

Strides Shasun Ltd: Video interview with MD - Mr Arun Kumar

As part of Axis Capital's endeavor to provide unmatched corporate access to our institutional investors, we interviewed Mr. Arun Kumar, Executive Vice Chairman & MD of Strides Shasun Ltd. In this tête-à-tête, we have tried to capture – 1) the company's strategy (of creating a differentiated business model with "difficult to operate" theme), 2) its journey from Version 1.0 to Version 2.0 (selling and acquiring businesses in the past 5-6 years) 3) the next milestones (to optimize profitability across businesses) and 4) the views on some recent industry issues (USFDA etc.)

Click on the image below to see the interview*



* Note: Best viewed in Google Chrome

Key questions addressed in the interview

- ◆ Company's philosophy and vision
- ◆ Key milestones for next 3-5 years; revenue/ margin outlook
- ◆ Re-entering Australia in a leadership position
- ◆ Growth outlook in Africa market
- ◆ Shasun's merger ensures strong back-end
- ◆ US: Approvals/ filings momentum picking up
- ◆ US channel consolidation: Challenge or opportunities for new entrants
- ◆ Biotech R&D unit to be spun off in FY17
- ◆ Financial parameters used for acquisitions
- ◆ Rationale for exiting CRAMS business
- ◆ Succession planning at company
- ◆ Industry views – Niches to become commodities?
- ◆ Industry views – Increasing USFDA instances in India?
- ◆ Key attributes admired in other companies

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