



IHH Healthcare

Touching Lives, Transforming Care

14TH ANNUAL GENERAL MEETING

28 MAY 2024

A light blue world map is centered in the background of the slide, showing the outlines of continents and countries.

We are a truly **global**
healthcare leader with
differentiated **reach and scale**

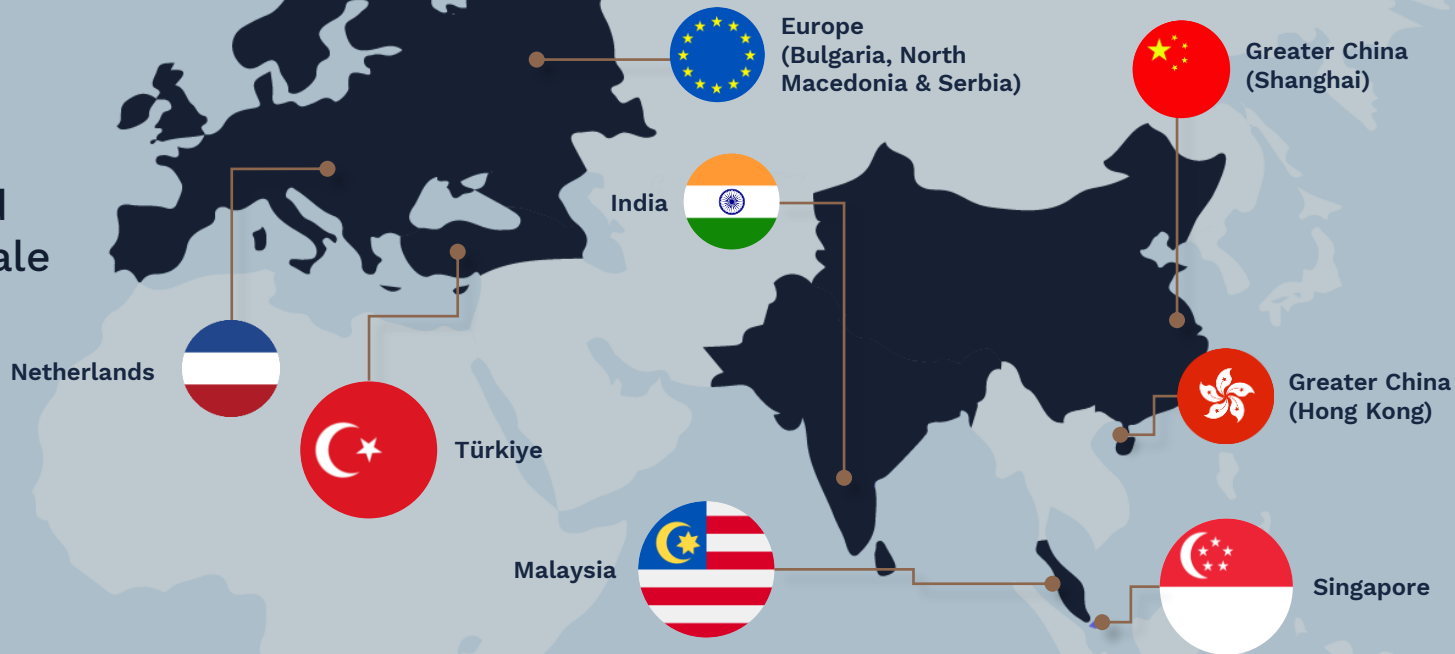
We are a truly global healthcare leader
with differentiated reach and scale

80+ Hospitals

10 Countries

12,000+ Operational Beds

We are a truly global healthcare leader with differentiated reach and scale



80+ Hospitals

10 Countries

12,000+ Operational Beds

ACIBADEM

Fortis

PANTAI

PRINCE COURT
MEDICAL CENTRE

Gleneagles

Mount Elizabeth

Parkway

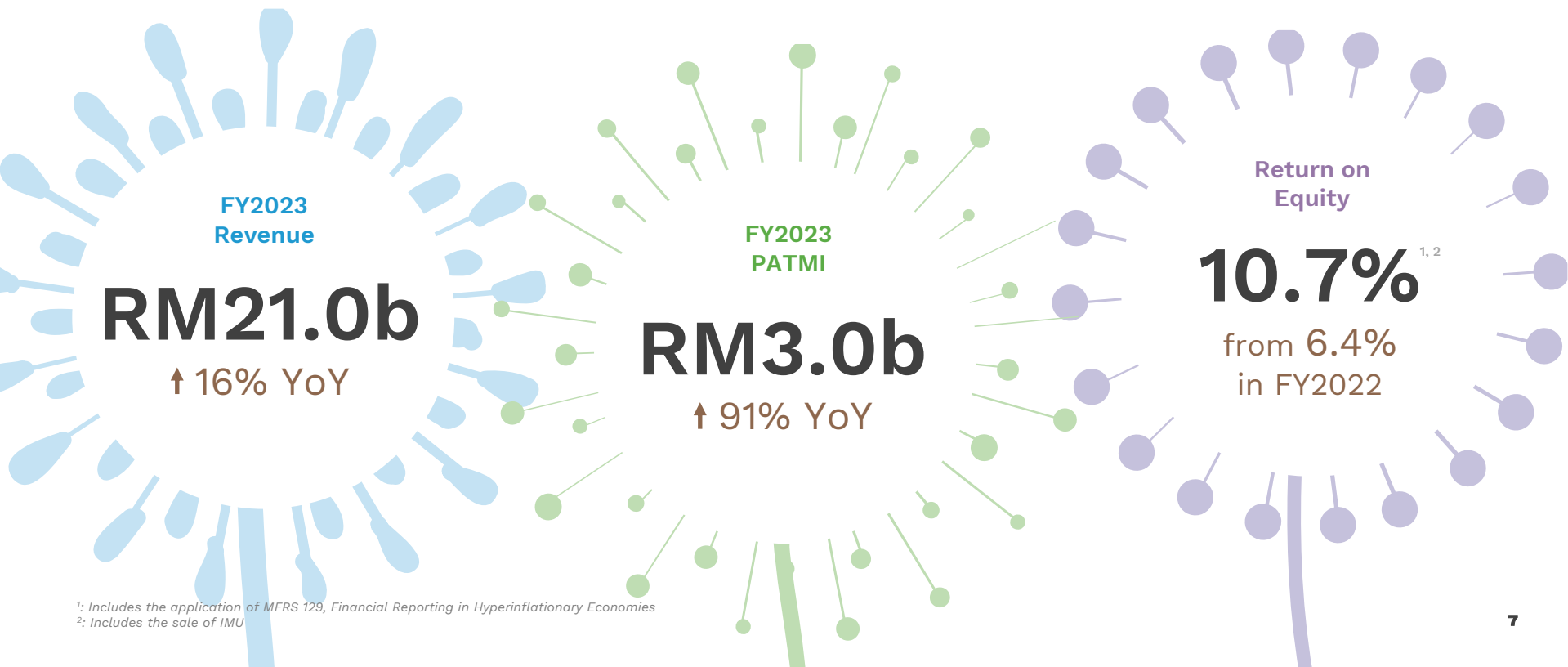
We deliver profitable
growth and value
while adhering to
our aspiration to
Care. For Good.



Care. For Good.
Putting Patients
in the centre of
what we do



We deliver profitable growth and value while adhering to our aspiration to Care. For Good.



¹: Includes the application of MFRS 129, Financial Reporting in Hyperinflationary Economies

²: Includes the sale of IMU

Delivering and enhancing value for shareholders



RM21.0b

FY2023 Revenue



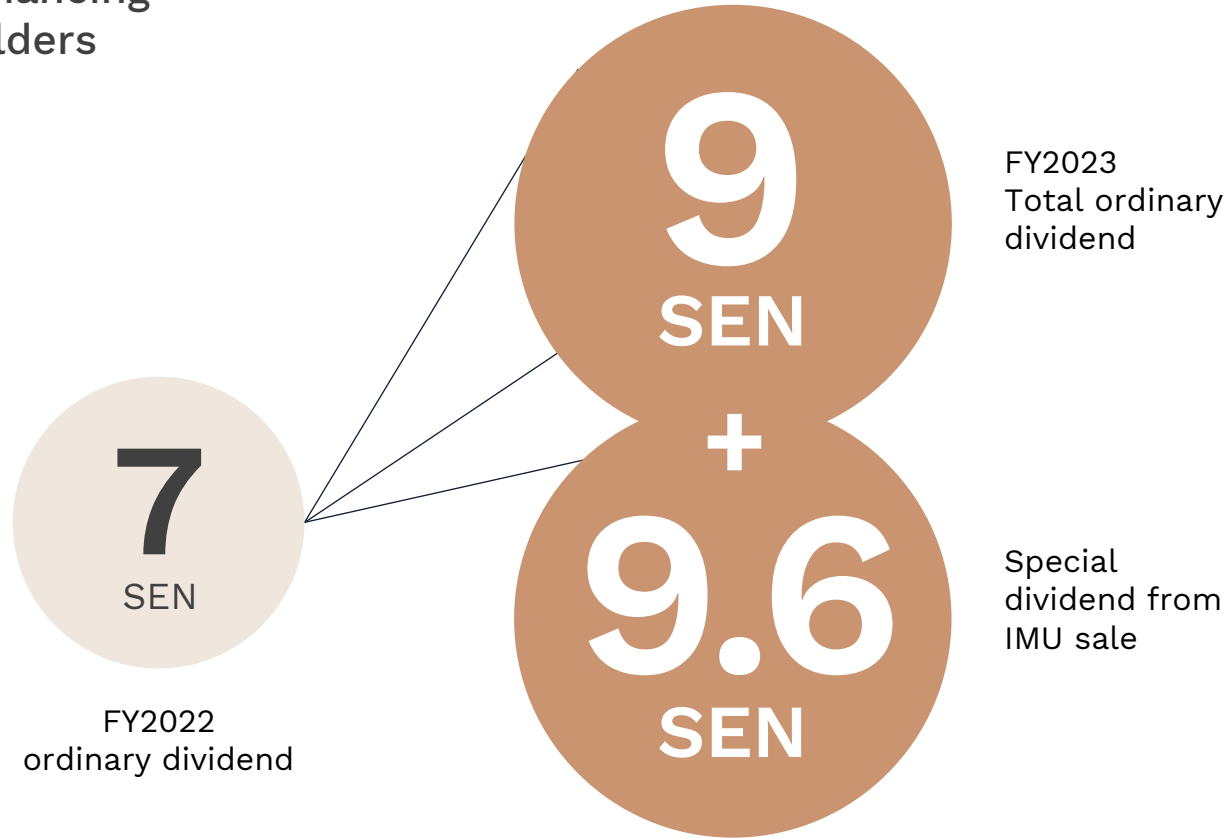
RM3.0b

FY2023 PATMI



10.7%

Return on Equity



Delivering and enhancing value for shareholders



RM21.0b

FY2023 Revenue



RM3.0b

FY2023 PATMI

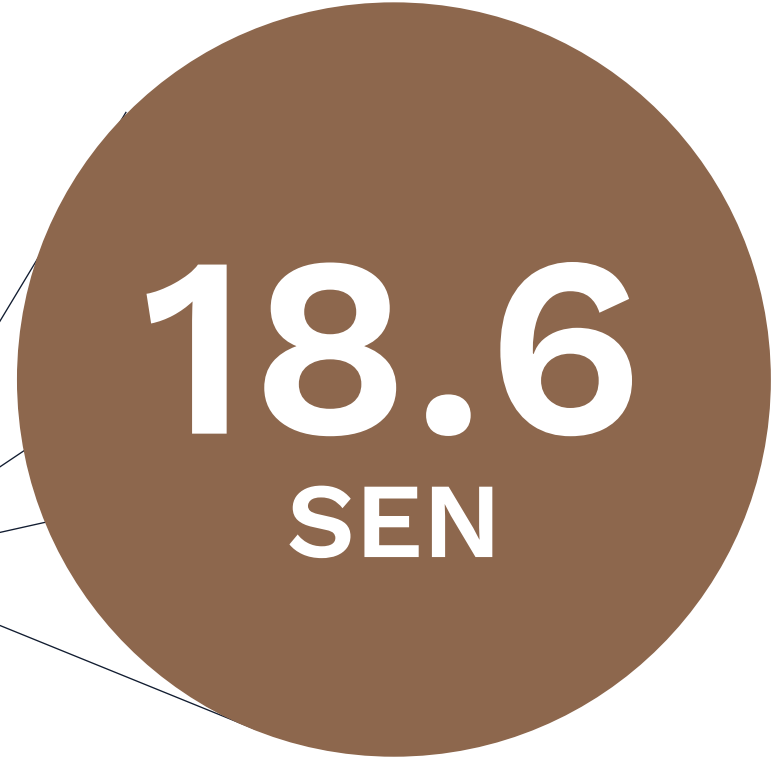


10.7%

Return on Equity

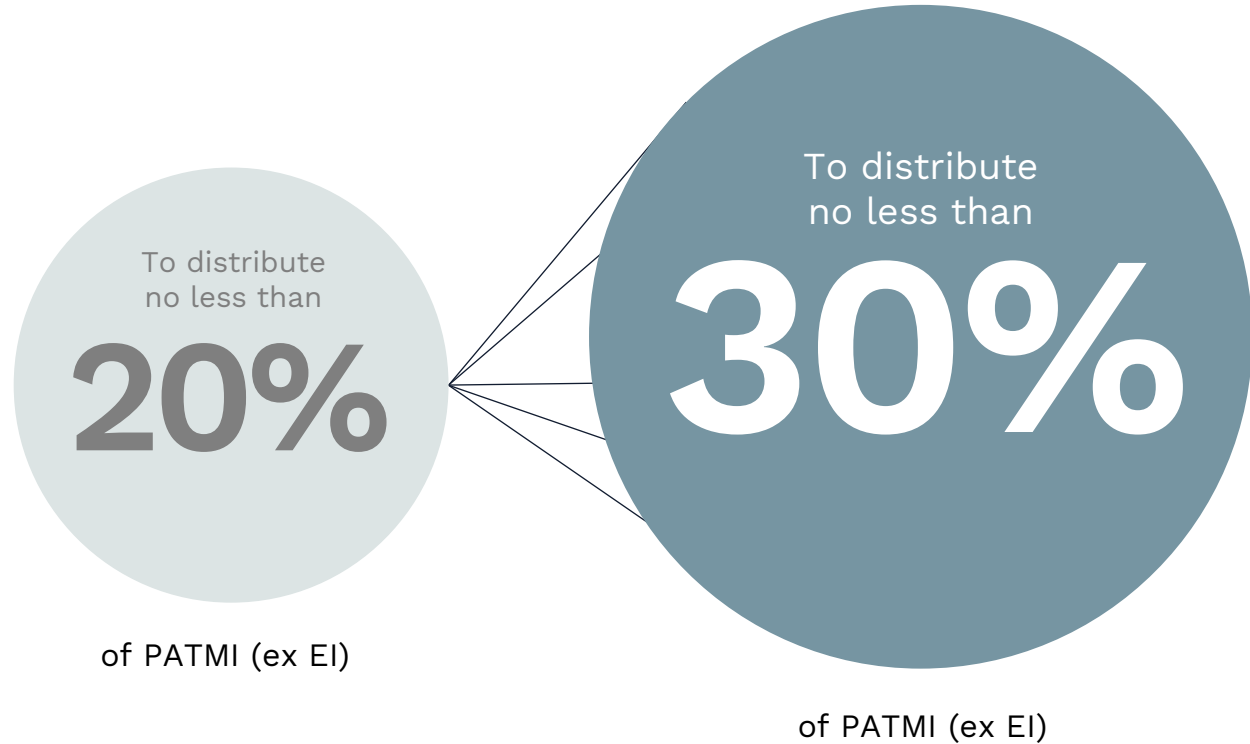
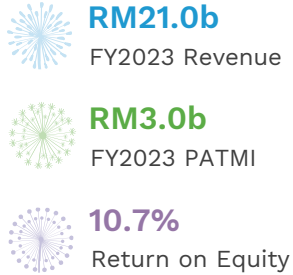


FY2022
ordinary dividend

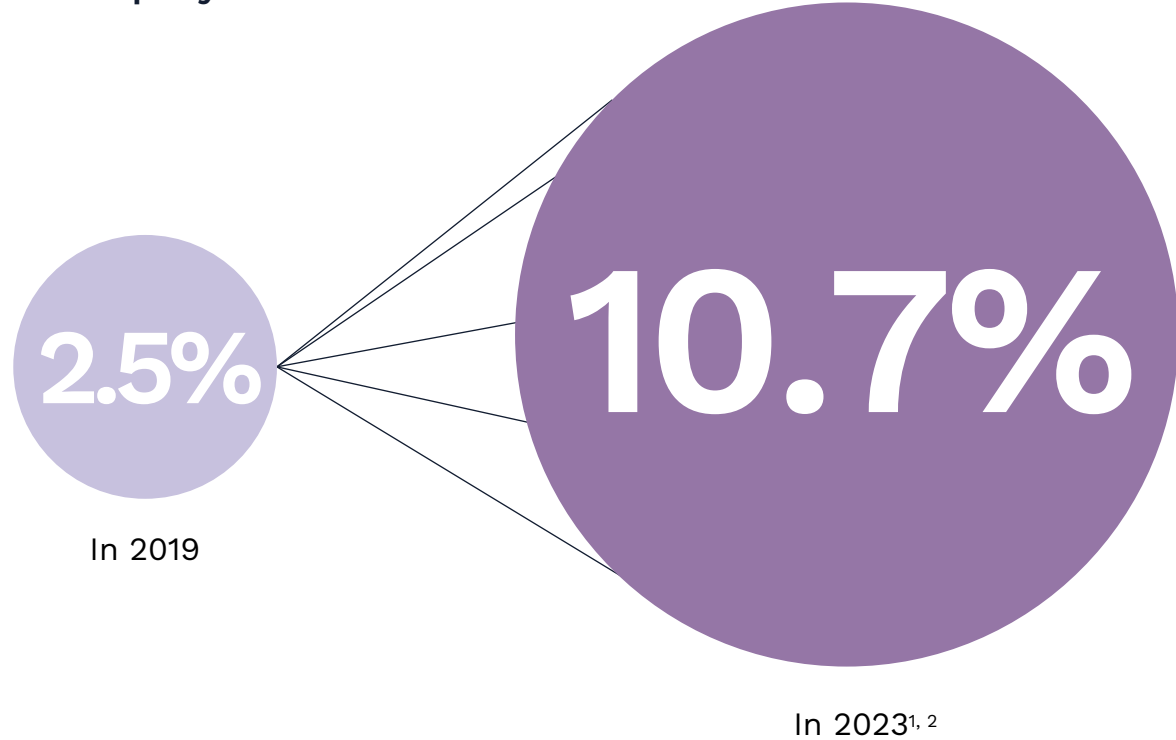
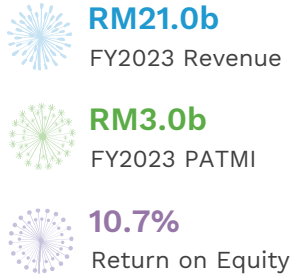


Total dividends paid
out for FY2023

Delivering and enhancing value for shareholders: Dividend Policy



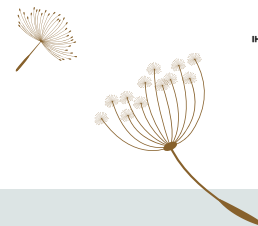
Delivering and enhancing value for shareholders: Return On Equity



¹: Includes the application of MFRS 129, Financial Reporting in Hyperinflationary Economies

²: Includes the sale of IMU

Doing well, doing good.
Growing responsibly and profitably.



**Most Outstanding
Company in Singapore**

Healthcare Sector



Growth in PAT over 3 years

*Healthcare Services,
Pharmaceuticals, Biotechnology
and Medical Research sector*

**Forbes 2023
WORLD'S BEST
EMPLOYERS**



**Ranked 250 among 700
best employers globally**

ACE framework

Anchored on Care. For good.



Align to propel
profitable growth



Challenge
to transform



Empower
to excel



ACE framework: Propel growth and be a sustainable healthcare leader

1 / Deliver
profitable growth
and healthy ROE

2 / Leverage our
clinical and care
excellence to
Care. For Good.



Grow
Organically



Expand Across
Healthcare Continuum



Develop new
growth engines



Capture Inorganic
Opportunities



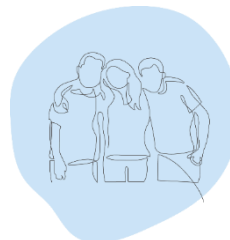
Turnaround
underperforming
assets



Our Patients

7.4m

Patients have access to
their medical records online



Our People

70,000+

Talented and dedicated
employees



Our Public

~1.3m*

Number of
lives touched



Our Planet

2050

Commitment to
Net-Zero by 2050

*Number of lives touched includes cumulative number of patients utilising IHH services targeted at reducing antimicrobial resistance and disease burden, and number of beneficiaries reached through our public corporate responsibility programmes.

Driving Our Business Forward

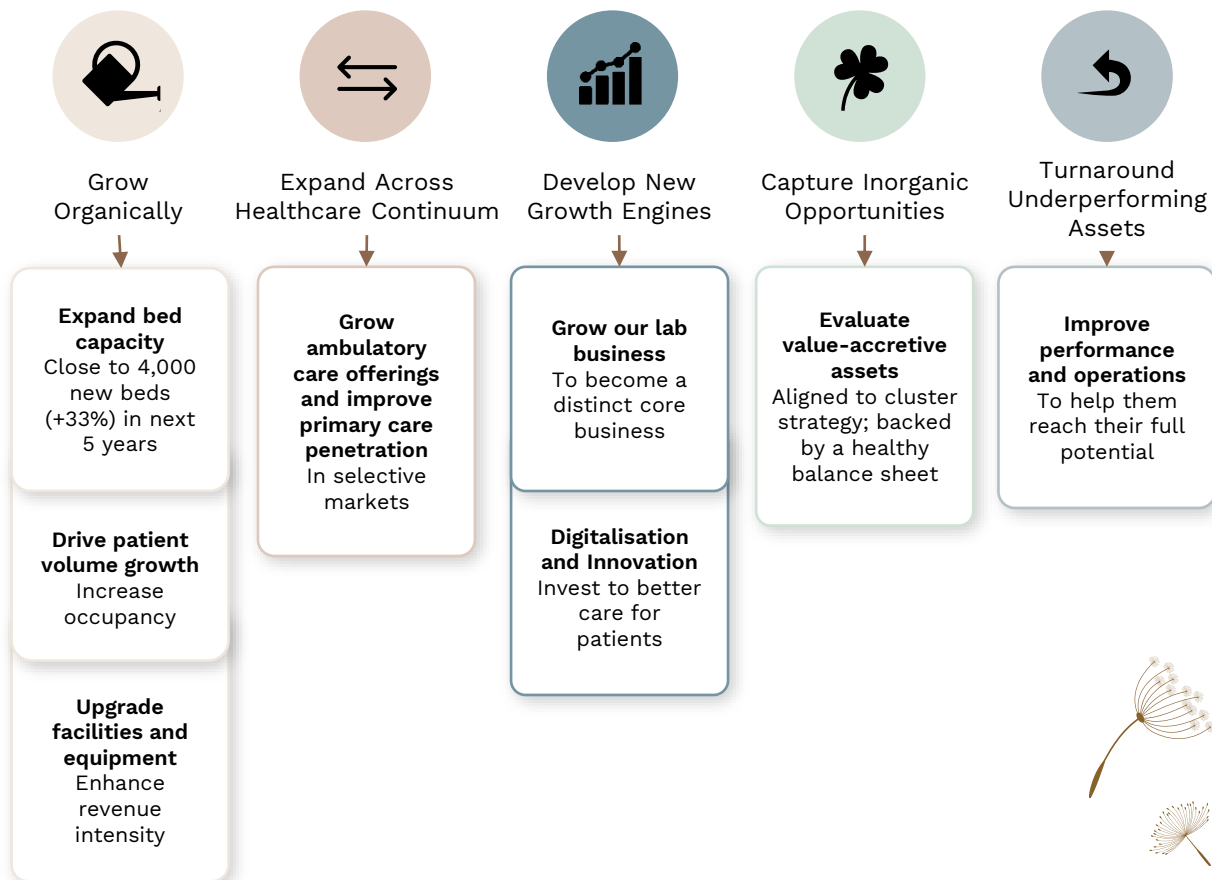
Guided by ACE Framework to Propel Growth

ACE framework: Propel growth and be a sustainable healthcare leader

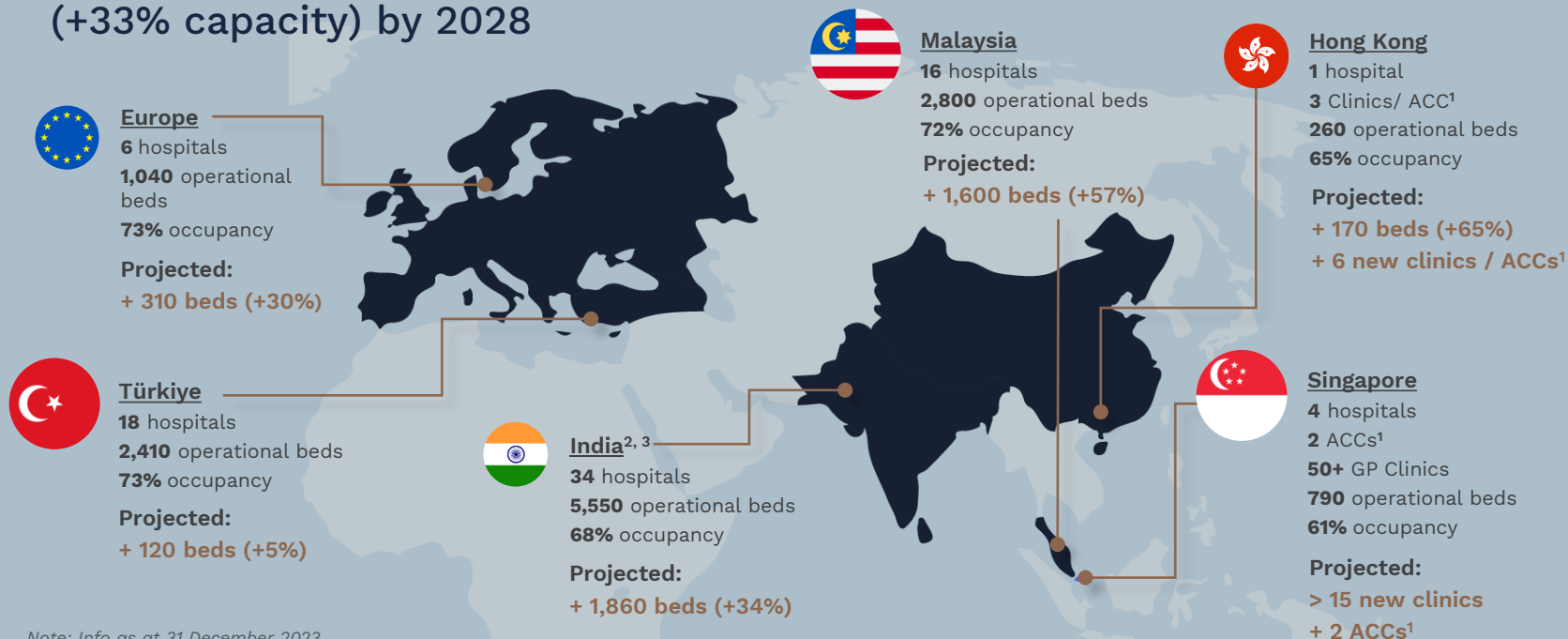


1 / Deliver
profitable growth
and healthy ROE

2 / Leverage our
clinical and care
excellence to
Care. For Good.



Organic Growth: To add ~4,000 beds (+33% capacity) by 2028



Note: Info as at 31 December 2023

¹: ACC refers to Ambulatory Care Centre

²: Includes Fortis Healthcare and Gleneagles Hospitals

³: Includes 5 hospitals managed for third parties.

**FY2023 Overall
Group performance**



Occupancy
69%



Inpatient Admissions
869,673 (+7%)



Operational Beds
12,307



Lab Tests
96.0 million (+6%)

Malaysia

Strategic Priorities



Grow
Organically



Capture
Inorganic
Opportunities



- Strong growth in **inpatient volume and revenue**
- Hospital network expanded from **11 to 16**
- **Signed MOU** to develop block adjacent to Gleneagles Hospital Kuala Lumpur
- Acquired **Timberland Medical Centre** in Kuching, Sarawak, and able to scale up via construction of a new 200-bed hospital
- Attract more **foreign patients**

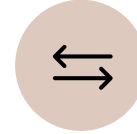


Singapore

Strategic Priorities



Grow
Organically



Expand Across
Healthcare
Continuum

- Supports national agenda with **ambulatory care centres (ACCs)** and **GP clinics**
- Executing “**Out of Hospital**” strategy to leverage on fast growing healthcare market as population ages and focuses on preventive health increases
- Plans to **increase ACCs**
- Plans to **add over 15 primary care clinics** over the next 5 years



Türkiye & Europe

Strategic Priorities



Grow
Organically



Capture
Inorganic
Opportunities

-
- Ramp up **Acibadem Ataşehir hospital** and **Acibadem Kent hospital**
 - Close to 50% of business is non-Lira as part of currency diversification strategy
 - On the lookout for opportunities in Türkiye, particularly in Istanbul, and Europe
 - **6 million patient admissions yearly**
 - Performs **162,000 surgeries**



India

Strategic Priorities



Grow
Organically



Capture
Inorganic
Opportunities

- **Twin engines of growth:** Fortis Healthcare and Gleneagles Hospitals
- Unique pan-India footprint
- **World-class organ transplant outcomes** comparable to top US research hospitals: **~1,500 transplants** performed in 2023
- Invest in **cutting-edge medical equipment** and upgrade hospitals for better clinical treatments, outcomes and patient experience

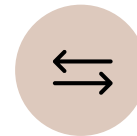


Hong Kong

Strategic Priorities



Grow
Organically



Expand Across
Healthcare
Continuum

- Grown from single hospital in 2017 to healthcare services network offering ambulatory care and laboratory testing
- Ramp up operations in Gleneagles Hong Kong hospital
- Plans to open **another 2 to 3 ambulatory care centres**, on top of existing 2



IHH Labs



Strategic Priorities



Grow
Organically



Expand Across
Healthcare
Continuum



- Organic growth through expansion of high-end test menus (e.g., genetics testing)
- Transformation of our operations
- Digitalisation of our core platforms
- Continued productivity focus
- Establish reference labs within core markets

Our Sustainability Goals

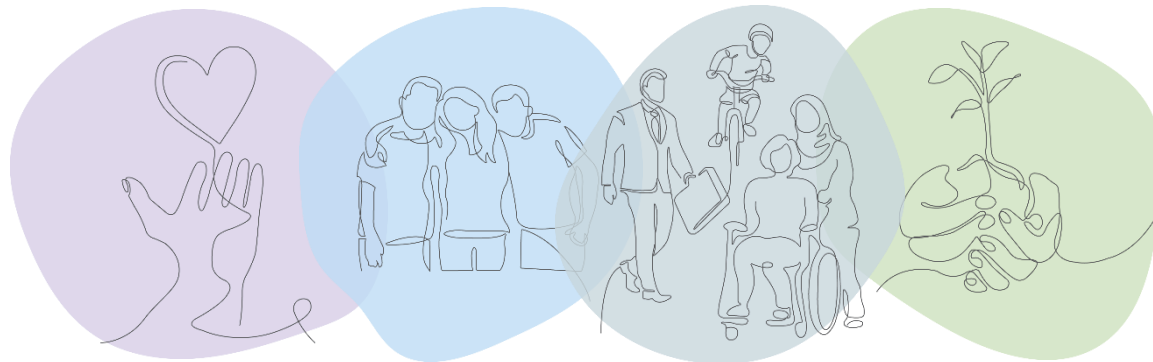
Leveraging our
leadership to catalyse
a sustainable ecosystem

ACE framework: Propel growth and be a sustainable healthcare leader



1 / Deliver
profitable growth
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Our Patients

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Our Public

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Our Approach to Sustainability

Empowering Our Patients

We focus on delivering better, faster, more convenient and transparent care through a variety of initiatives that range from striving for better clinical outcomes to empowering patients via digital platforms

Protecting Our Planet

We are progressively advancing in environmental stewardship by focusing first on our waste management and carbon footprint through energy efficiency projects



Shaping the Best Place to Work

We enhance our programmes and policies to foster a safe culture and workplace environment that prioritise employee total well-being, that nurture diversity and inclusion, and that continuously engage and develop our people to bring out the best in them



Nurturing a Healthier Society

We focus on tackling antimicrobial resistance, reducing disease burden through health literacy and screening (for cancer and cardiovascular diseases) and making available quality healthcare to the underserved through free or subsidised treatment.

Governance

A robust governance structure keeps us on track in our sustainability journey, with clear accountability ensuring that all legal and regulatory obligations are met.

Our Approach to Sustainability



Patients

Empowering Our Patients

Comprehensively reviewed our existing 17 clinical quality indicators and undertook a crosswalk analysis to align them with international indicators

Increased number of Value-Driven Outcomes (VDO) quality indicators tracked from 113 to 157 to improve value based care

Increased billing estimate accuracy from 85% to 87% using AI

Over 7.4 million patients have access to their medical records online

Established 2 new innovative partnerships with Annalise and Airdoc offering AI-powered digital imaging capabilities

¹ VDO is about using data to improve quality and outcomes while ensuring cost effectiveness.

² Applicable to our hospitals in Malaysia and Singapore

³ Global IHH Pulse survey 2023



People

Shaping the Best Place to Work

42.5% women in leadership roles across IHH

Partnered with Intellect to provide comprehensive mental wellbeing services for employees

5.6% increase in nursing talent

Over 1 million training hours achieved to foster a culture of Learning & Development across IHH

EES score on employee engagement was 2% above Global Healthcare benchmarking score

86% of our employees felt that we collaborate well, 85% of our employees trust their immediate manager



Public

Nurturing a Healthier Society

As part of our Antimicrobial Stewardship Programme, 100% of our markets established relevant committees and guidelines for common infections and procedures

Conducted 667,560 health screenings

Conducted 297,049 cancer screenings for breast, cervical and colorectal cancers

Contributed close to USD\$5 million in aid of earthquake victims in Türkiye and Syria

Expanded our flagship corporate responsibility initiative – Life Renewed – from Malaysia to Singapore via a two-year partnership with Para Athletics (Singapore)



Planet

Protecting Our Planet

Reduced 3.8% emission intensity per patient bed day, across our operations

Reduced 99% single-use virgin plastics in non-clinical areas in Singapore and 79% single-use virgin plastics in non-clinical areas in Malaysia

Expanded Group's Balanced Scorecard to include anaesthetic gas emissions reduction targets

Began to chart a roadmap for climate disclosures aligned with the recommendations of the Task Force on Climate-Related Financial Disclosures (TCFD)

Our Approach to Sustainability



Patients

Empowering Our Patients

- Increased number of **Value-Driven Outcomes (VDO) quality indicators tracked from 113 to 157** to improve value-based care
- Increased billing estimate accuracy from **85% to 87%** using AI



Our Approach to Sustainability



People

Shaping the Best Place to Work



- **5.6% increase** in nursing talent
- **86%** of our employees felt that we **collaborate well**; **85%** of our employees **trust** their immediate manager

Our Approach to Sustainability



Public

Nurturing a Healthier Society

- **Life Renewed** – IHH Malaysia renews MOU with Ministry of Health Malaysia to provide free radiotherapy and radiosurgery treatment for 500 patients from government hospitals



- As part of our **Antimicrobial Stewardship Programme**, 100% of our markets established relevant committees and guidelines for common infections and procedures

Our Approach to Sustainability



Planet

Protecting Our Planet



- **Reduced 3.8% emission intensity** per patient bed day, across our operations
- **Reduced 99%** single-use virgin plastics in non-clinical areas in Singapore and **79%** single-use virgin plastics in non-clinical areas in Malaysia

Touching Lives, Transforming Care.

1

Put patients first, with a greater focus on delivering better, faster, more convenient and transparent care

2

Raise the bar in healthcare across the multiple geographies we operate in and pursue clinical excellence and outcomes

3

Continued revenue growth with a focus on driving profitability and a sustained healthy ROE



IHH Healthcare

Thank you

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