



Marshall

2021

VISION

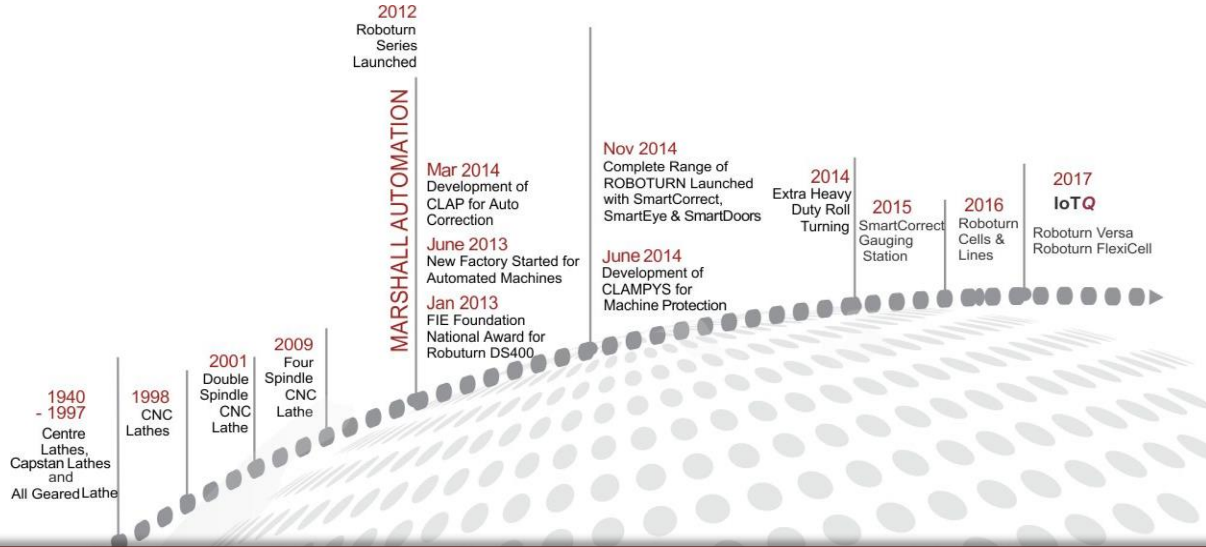
Marshall Machines Ltd



HISTORY OF INNOVATION



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MARSHALL MACHINES LTD, the most innovative machine tool manufacturer in India and the pioneer in 'Intelligent Automation' was started as Marshall Industries in 1961 by our visionary founder, Sh. Gautam Sarup. His father had built one of India's first lathes in 1940 in Lahore and instilled a love from a very young age. He was joined by his two sons Gaurav Sarup (in 1986) and Prashant Sarup (in 1989). From Bench Lathes to Capstan Lathes to Multi Spindle Drilling/Tapping machines to CNC Lathes to Intelligent Automated CNC Cells it has been a long journey fuelled by a passion for Excellence and Innovation.



MD GAURAV SARUP WITH OUR FOUNDER LATE SH. GAUTAM SARUP DURING JOINING CELEBRATIONS OF HIS SON SIDDHANT (BTECH & MBA) IN 2014. THE COMMITTED , ENERGETIC , PASSIONATE , PROFESSIONAL TEAM WITH LEGACY OF THREE GENERATIONS



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MORE THAN 1000 CUSTOMERS SERVED IN AUTOMOTIVE, AEROSPACE, RAILWAYS, DEFENCE & GENERAL ENGG SECTORS

- OEMs like Sonalika Tractors, Hero MotoCorp, Yamaha, NBC Bearings, Havells, Crompton, Usha (Shriram Group), ABB Motors, Polycab, RR Kabel, V Guard, CRI Pumps, BHEL, DRDL (Defence Organization), etc.
- Tier 1 like Rockman, Munjal Showa, MM Forgings, Shivam Autotech, Satyam Auto, Endurance Technologies, Varroc, Bharat Forge, Kalyani Technoforge, Sundram Fasteners, Brakes India, LG Balakrishnan, GNA Axles, RSB Transmissions, Tubes India, New Allenberry Works, Menon Pistons, etc.



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ACHIEVEMENT

AWARD



FIE- National AWARD at IMTEX-2009 for 'QUATTRO 4S' Four Spindle Chucker



**AWARD CEREMONEY 29TH JANUARY 2013 Mr. Gaurav & Prashant Sarup
receiving the National Award for ROBOTURN DS 450**



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National Award Being received from the jury of FIE foundation for our Automation Integration with intelligence in 2015



MARSHALL WINS THE FIE FOUNDATION NATIONAL AWARD IN 2017 FOR IT'S PATH BREAKING CONCEPT OF 'IOT_Q' INTERNET OF THINGS FOR *QUALITY*. IT IS A 'SUPER OPTIMIZED FACTORY MANAGEMENT FRAMEWORK

WORLD CLASS INFRASTRUCTURE



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**World Class
Manufacturing
Facilities**



**New 5 Axis CNC Universal
Machining Center with Auto
Indexing head with "A" &
"B" Axis**



**Machine Parts
Designed & Validated
Using Solid Works**



**World's Best STUDER
CNC Cylindrical Grinder**



**World Class German
Mother Machinery**

WORLD CLASS INFRASTRUCTURE



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**Machine Structure
(SL-12D Double Head)**



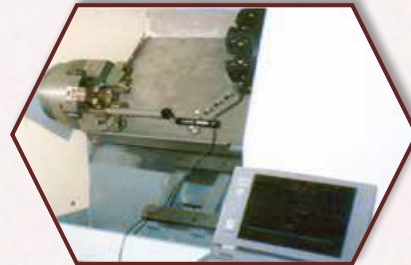
**Headstock Assembly
& Testing**



**Laser Calibration &
Testing**



Inspection of Machine



**Ball Bar Test for Checking
Dynamic Performance of M/c**

FOREIGN TIEUPS



Marshall is Dealer of M/s SPINNER (**Germany**) one of Europe's top builders of Turning & Machining Centres

Marshall has Technical Partnership with M/s CARON Eng. (**USA**) for machine performance enhancement technologies

Marshall had a tie-up with M/s DOOSAN (**S. Korea**) from 2012-2014 to produce LYNX 220 series in India.

VISIT TO DOOSAN, SOUTH KOREA IN FEB. 2012 TO SIGN COLLABORATION



**Marshall Team With Doosan M.D at R&D Centre
Marshall & Doosan Team**

**Marshall Team at Doosan Factory Shop
Visiting Doosan Assembly**





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USA BUSINESS

**Highlights of 2020 &
Road Ahead in 2021
Post Covid**



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Marshall Automation America, Inc. successfully started operations from Atlanta, US launching & inaugurating their Technology Center



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MAAI participated in SOUTHTEC Exhibition in Greenville, SC, the hub of Automotive manufacturing in South East USA

NEW PARTNERS OPEN HUGE POSSIBILITIES



- Marshall was hampered by lack of direct sales force in USA and was relying only on tradeshows & Digital Marketing.
- In 2019 end, it tied up with the world's leading IIoT Platform (**Machine Metrics**) who has its systems installed on thousands of CNC machines in hundreds of customers AND with THE TOOL & GAGE HOUSE, one of the largest dealers of measurement equipment who has almost all top OEMS & TIER 1 & 2 companies in its customer base.



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Marshall - Machine Metrics Agreement





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Machine Metrics (World # 1 Industrial IoT Hybrid Platform (SaaS + Platform) & Marshall signed agreement for cooperation in India & USA

MARSHALL - MACHINEMETRICS AGREEMENT (INDIA)



- Marshall will integrate MM solution for machine monitoring, called MachineMetrics Production on existing machines for OEM, Tier 1 & Top Tier 2 companies. Apart from direct revenue, it will build relationships and help reach out to Vendors of OEM & TIER 1 companies.
- Pre-Load MM in its top end machines & automated lines to deliver high value to customers & enhance the saleability of its products

This is a **HUGE** Competitive advantage for Marshall.



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**THE TOOL
&
GAGE HOUSE
&
MORRIS SOUTH**

**MARSHALL ADDS
DEALERS**

TGH WILL SELL MARSHALL PRODUCTS THROUGH ITS WIDE NETWORK



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MARSHALL ADDS A TOP USA DEALER – MORRIS SOUTH



Charlotte: 12428 Sam Neely Road
Charlotte, NC 28278
Tel: 704-523-6008

Huntsville: 350 Electronics Boulevard
Huntsville, AL 35824
Tel: 256-461-8111

About Us

Morris South is a division of Morris Group, Inc. We supply CNC machine tools, tooling, accessories, software, automation, and more to manufacturers of precision machined parts. Our customer base is located in Alabama, Arkansas, Georgia, Mississippi, North Carolina, South Carolina, Tennessee, Virginia and the Florida panhandle.

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POST COVID SCENARIO IN USA (AUGUST 2020 ONWARDS)



- Most US Businesses are investing in upgrading their manufacturing setup to meet 'Rebound in demand' caused by many factors including reduction of imports from China.
- Top Industrial magazine Modern Machine Shop (MMS) reports that biggest focus is on reduction in manpower through Industry 4.0 & Automation.
- With TGH & Morris (South), Marshall has conducted 3 Webinars for potential customers and received several Inquiries for their Smart Technologies.
- We hope to finalize many orders in the next 3 months.



BUSINESS IN INDIA POST COVID

**Highlights
of
2020-21**



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Manpower Shortage

Competitive through efficiency improvement and elimination of waste

Social Distancing in Factories

Return on Investment (ROI)

Avoid Rejections

**MARSHALL PROVIDE
SOLUTIONS
FOR**

WE ARE PIONEER IN SMART MANUFACTURING IN INDIA



Affordable automation

Universal Machines on Cloud

Predictive Maintenance

Auto Gauging for Auto Correction

SMART AUTOMATED MACHINES & I 4.0



- From 10% share in FY 19, sales of Smart Automated Machines rise to over 40% in FY 20.
- Indian manufacturers are rapidly moving towards smart, automated factories and Marshall is the pioneer & leader in this field. 5 Patent awarded & 16 patent pending .
- We offer ROBOT operated Cells for higher end applications & our Patented SMARTLOAD as 'affordable automation' to cost conscious Tier 2 & 3 customers



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**ROBOT OPERATED MACHINING CELLS: ORDERS WORTH 29.0 CR (10 CELLS @
RS. 2.90 CR EACH) RECEIVED IN FY 20 FOR ROCKMAN**



AFFORDABLE AUTOMATION FINDS ENTHUSIASTIC ACCEPTANCE

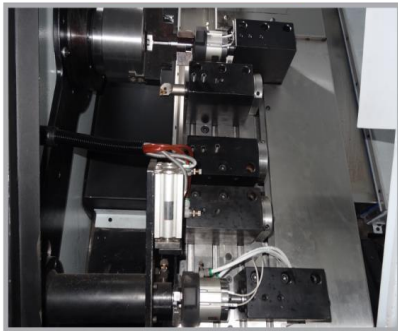


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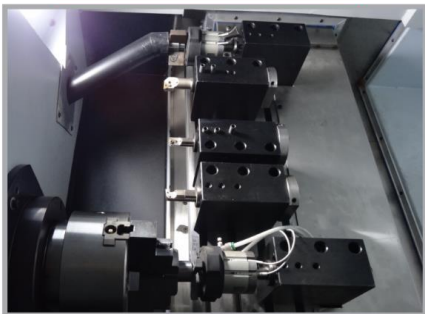


RAPIDTURN ST-1 Launched at IMTEX-1998

TWIN GRIP



TWIN RELEASE



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***uno* + SmartLoad 10**

NATIONAL AWARD BEING RECEIVED FROM THE JURY OF FIE FOUNDATION FOR OUR AUTOMATION INTEGRATION WITH INTELLIGENCE IN 2015



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MARSHALL SETUP INDIA'S FIRST INDUSTRY 4.0 CENTER IN IMT MANESAR TO TRAIN CUSTOMERS IN 'SMART MANUFACTURING'



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INDIA

**ROAD AHEAD IN INDIA
AUGUST 2020 ONWARDS**

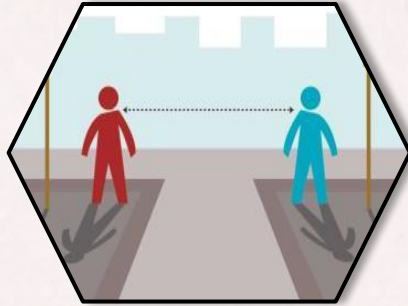




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**Shortage of Skilled
Operators**



**Social Distancing after
COVID Pandemic**



**Need to have higher OEE to
improve profits.
(Automated machines have
25-40% extra output)**

**WHY IS AUTOMATION & SMART TECHNOLOGIES NEEDED IN POST COVID
SCENARIO?**

DOMESTIC TIE-UP FOR PROMOTING INDUSTRY 4.0 & AUTOMATION (SMART TECHNOLOGIES)



- Marshall has joined **CII** Smart Manufacturing Platform as 'Technology Provider' and to provide TRAINING in Smart Manufacturing to their members.
- Marshall has joined hands with **ACMA & SAKSHAM Centre of Excellence** to provide TRAINING in Smart Manufacturing to their members.
- Marshall is working closely with many OEM's & Tier 1 companies to provide Smart Technologies to their vendors.
- Marshall is signing MoU with **PHD Chamber of Commerce** to Train its members & supply Industry 4.0 solutions
- Marshall is partnering with IamSME of India (India's largest & fastest growing MSME organization) to supply CNC machines pre-loaded with Industry 4.0.



LAUNCH OF INDIA'S 1ST CNC MACHINE TOOL PRE-LOADED WITH LATEST CLOUD BASED MACHINE MONITORING (INDUSTRY 4.0) AND OPTION OF PREDICTIVE MAINTENANCE



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**LAUNCH OF GANTRY TURN, WORLD'S MOST ECONOMICAL DOUBLE SPINDLE
AUTOMATED CNC LATHE**



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**LEADING THE AUTOMATION REVOLUTION IN INDIA WITH WIDEST VARIETY OF
AUTOMATED MACHINES**

सक्षम THROUGH LEARNING & DEVELOPMENT



ACMA & **Marshall**learning present the World's

1st HYBRID TRAINING PROGRAM in

Automation & Industry 4.0

TRAINING 4.0:

**UPSKILLING FOR
SMART
MANUFACTURING**



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- Domestic and Global Manufacturing Opportunities.
- Supply Chain disruption from China- Opportunity for India.
- AatmaNirbhar Bharat –Initiative for domestic Manufacturing Contribution move from 15% to 25% of India's GDP.





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THANK YOU