



**Bangkok Dusit Medical Services (BDMS)**  
**Investor Presentation 2Q18&6M18 Results**  
**September 2018**



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- Operational Statistics & Financial Highlights
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# Overview

## Overview



45 Hospitals



~ 8,000 Beds



10 Centers of Excellence



BDMS Wellness Clinic



12,000+ Doctors  
8,000+ Nurses  
14,000+ Staffs



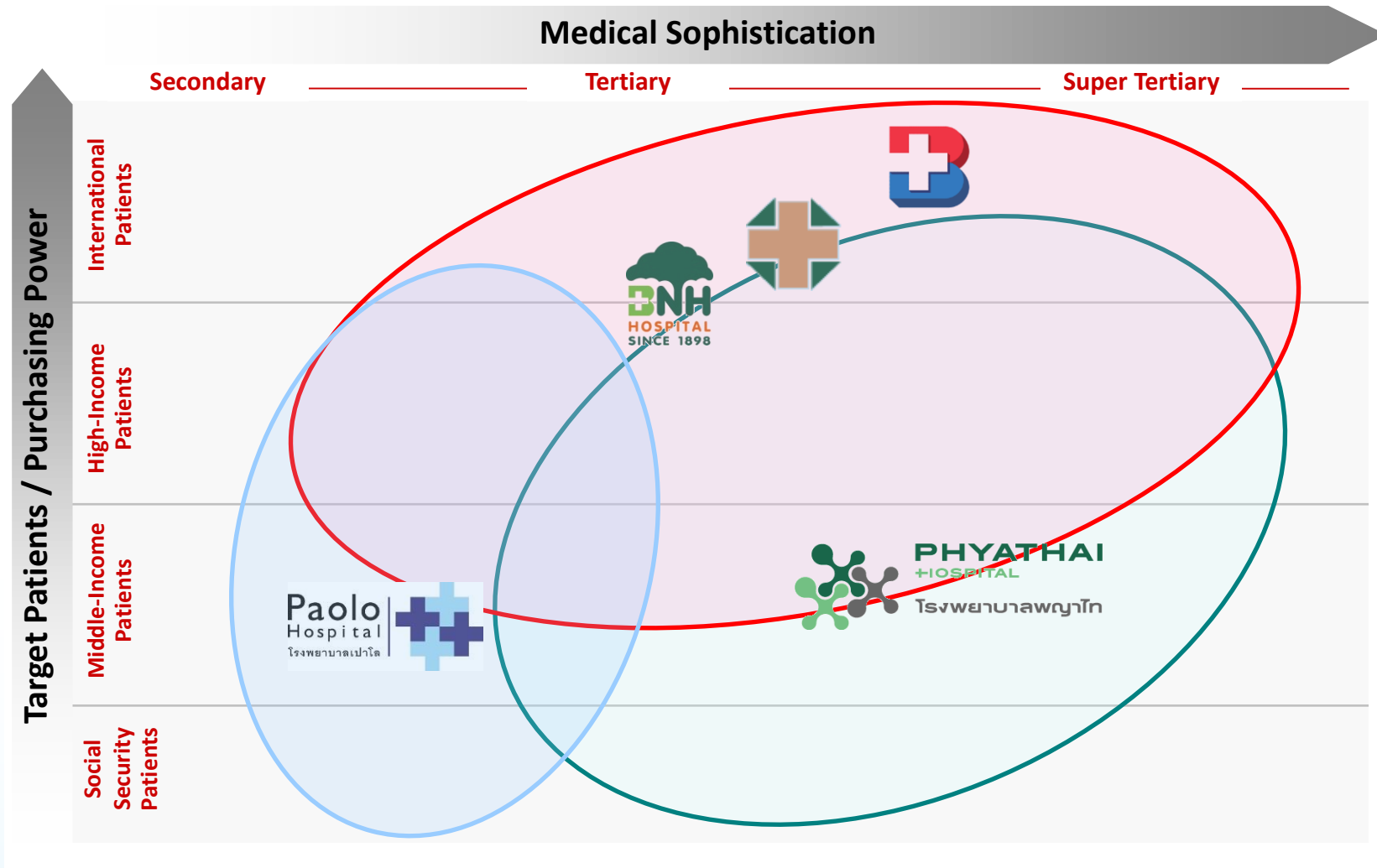
Pharmaceutical manufacturer and drug stores

- Established on February 26, 1972
- Top 5 private hospital operators in the world by market capitalization
- Hub-and-Spoke model with an established patient referral system helps create efficiency through scale

	Brand	No. of Hospitals	No. of Beds*
	Bangkok Hospital	21	3,602
	Samitivej Hospital	6	1,288
	Phyathai Hospital	5	1,241
	Paolo Hospital	6	1,008
	BNH Hospital	1	144
	Royal Hospital	2	130
	Local Hospital	4	546

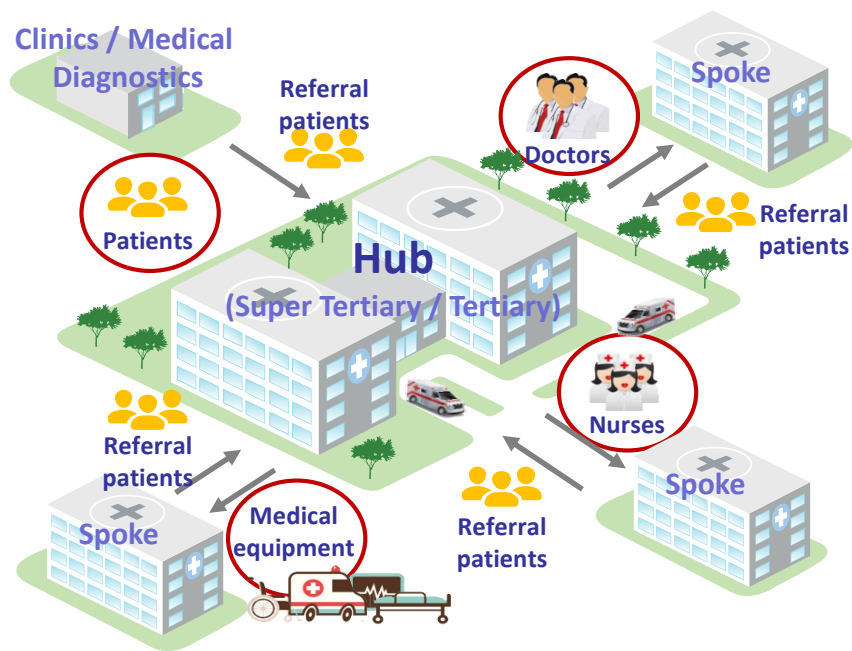
\* Maximum number of beds according to structure of the hospitals

# Diversification of Patient Mix



# 'Hub-and-Spoke' Model

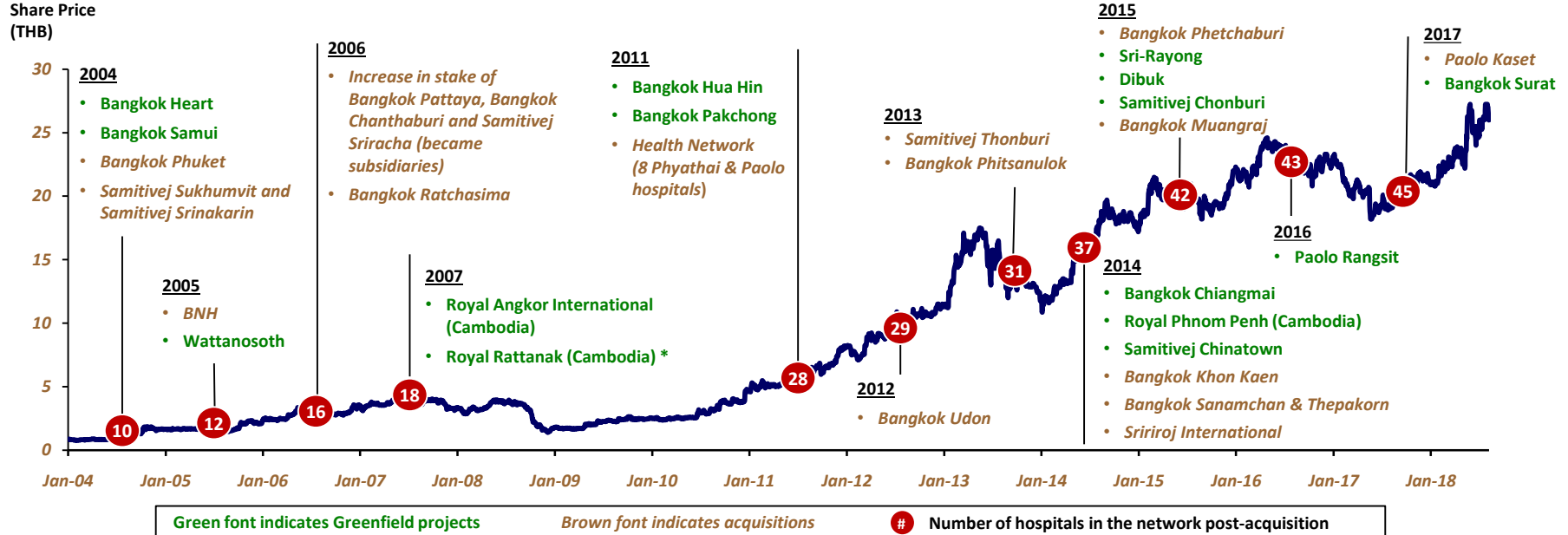
Providing a Proven Patient Referral System and Creating Efficiency Through Scale



- 1 Strong patient referral system within and across each hub and spoke
- 2 Enhances synergies and benefits of scale among hospitals within the group
- 3 Shared supporting services among multiple hubs which enhance efficiency and competitiveness
- 4 Established system provides a platform for future expansion

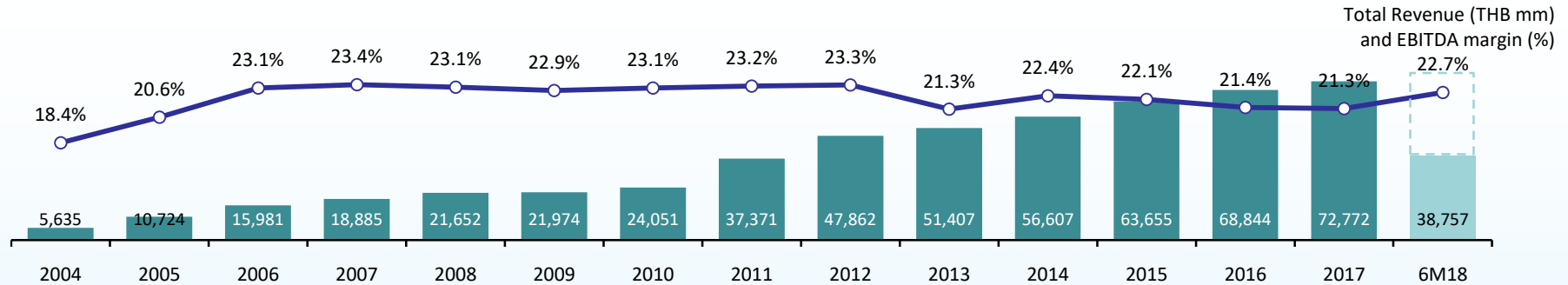
# Successful Track Record of Expansion Through M&A and Greenfield Projects

## Strong Share Price Performance Backed by a Successful Expansion Track Record



\* Transfer of business to our new facility, Royal Phnom Penh

## Solid Revenue Growth Over the Past Decade (2004-2017 CAGR of 21.7%) with Resilient EBITDA margin



Source: Derived from BDMS' financial statements

BDMS has developed 14 new hospitals and acquired a total of 30 hospitals to date



# BDMS Future Plan

## Key Strategies

	2017	2018	2019	2020
Hospitals in Pipeline	<ul style="list-style-type: none"> <li>45 Hospitals</li> </ul>			<ul style="list-style-type: none"> <li>~ 50 hospitals</li> </ul>
	<ul style="list-style-type: none"> <li>~ 8,000 beds</li> </ul>			<ul style="list-style-type: none"> <li>~ 8,500 beds</li> </ul>
	<ul style="list-style-type: none"> <li>✓ Paolo Kaset (162 beds)</li> <li>✓ Bangkok Surat (150 beds)</li> </ul>	<ul style="list-style-type: none"> <li>○ Bangkok Chiangrai (80 beds)</li> <li>○ Chiva Transitional Care (52 beds)</li> </ul>	<ul style="list-style-type: none"> <li>○ Phoenix Project (175 beds)</li> </ul>	<ul style="list-style-type: none"> <li>○ International Hospital (100 beds)</li> <li>○ Jomtien Hospital (233 beds)</li> </ul>
	<ul style="list-style-type: none"> <li>✓ BDMS Wellness Clinic: 1 Clinic</li> </ul>	<ul style="list-style-type: none"> <li>○ 8 Clinics for Wellness</li> </ul>	<ul style="list-style-type: none"> <li>○ Full operation for BDMS Wellness Clinic</li> </ul>	
Focus on Margin Expansion	<ul style="list-style-type: none"> <li>■ Increase utilization of ramping-up hospitals</li> <li>■ Improving operational efficiencies</li> <li>■ Centers of excellence</li> <li>■ International medical affiliation</li> </ul>			
Long-term Target	<ul style="list-style-type: none"> <li>■ Completed continuum of healthcare</li> <li>■ Top referral hospitals in Asia Pacific</li> <li>■ Long-term EBITDA margin target of ~ 25%</li> </ul>			

# BDMS Complete Continuum of Healthcare



## Centers of Excellence



Super Tertiary Care

Tertiary Care

Secondary Care

Promotive

Preventive

Early  
Detection

Curative

Transitional

Rehabilitative



BDMS Wellness Clinic



Phoenix Project



Chiva Transitional Care Hospital

## Non-Hospital Strategic Investment



Sterile Drug Manufacturer & Distributor



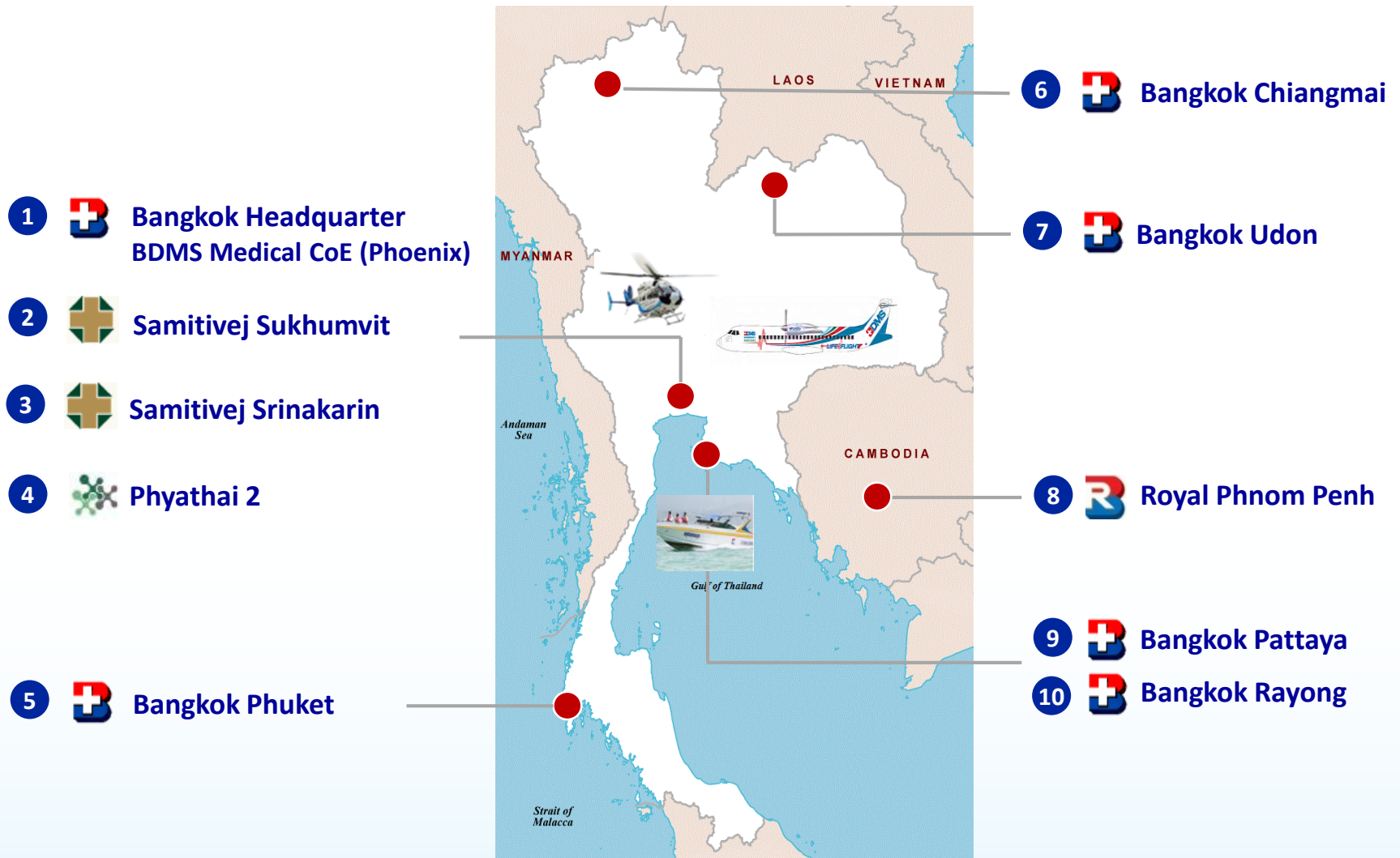
Generic Drug Manufacturer



Drug Store

# BDMS Centers of Excellence Network

Upgrading Existing 10 Hospitals to Become Centers of Excellence with the Focus on International Patients



# BDMS Network Capabilities

## Alarm Center: One Number All Access For Life Care



- One number access to entire BDMS network  
 **Thailand Domestic Calls 1724**  
**International Calls +66-2-BANGKOK, +66-2-226-4565**



- Dedicated multilingual emergency team  




- Complete range of emergency transportation available  


## State-of-the-Art Medical Equipment



New Radiation Machine: Varian EDGE



PET/CT Scan with Flow Motion



# BDMS Wellness Clinic

A Brand New Wellness Clinic Delivering World-Class Services



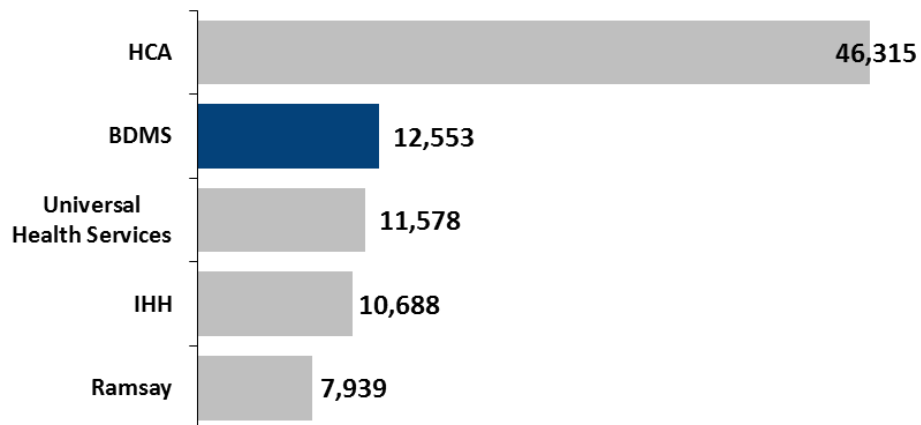
- Comprehensive preventative-care center
- Targeting high-end Thai and International customers
- Currently open Regenerative Clinic, Musculoskeletal and Sports Clinic and Dental Clinic

## 8 Centers of Preventive Excellence

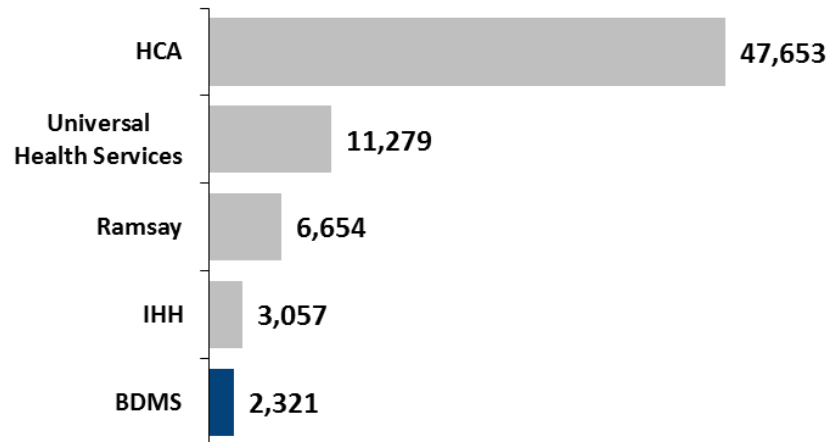
- 1 Regenerative Clinic
- 2 Musculoskeletal and Sports Clinic
- 3 Cardioscience Clinic
- 4 Neuroscience Clinic
- 5 Digestive Wellness Clinic
- 6 Breast Clinic
- 7 Fertility Clinic
- 8 Dental Clinic

# Global Hospital Rankings

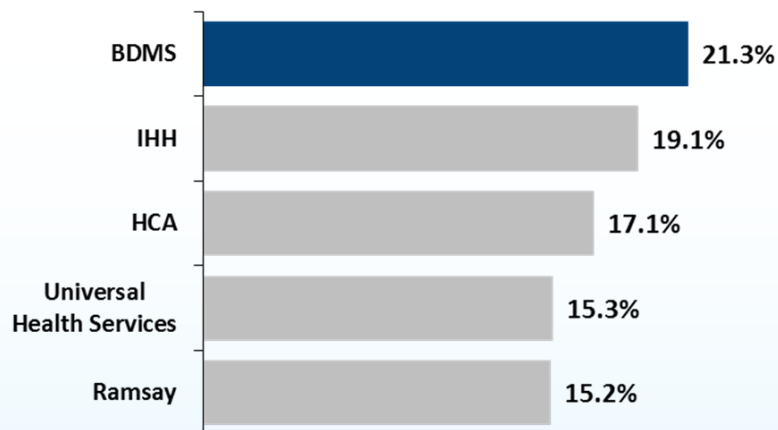
## Market Capitalization (USD mm)



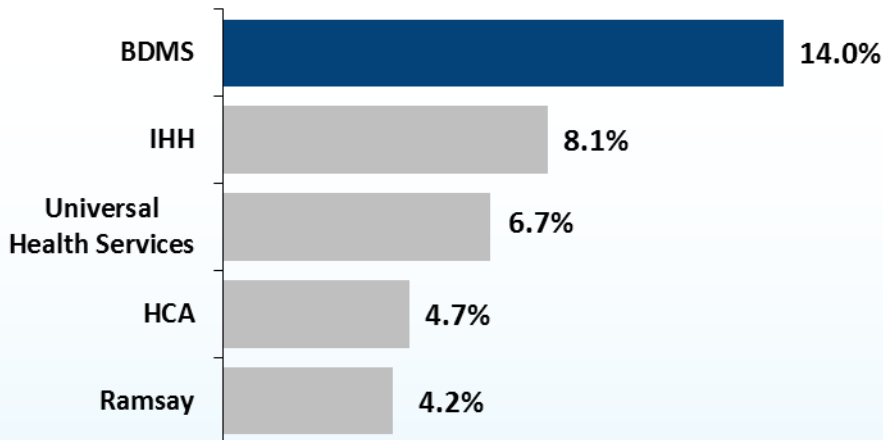
## Revenue (USD mm)



## EBITDA Margin



## Net Profit Margin



Remark: - Market capitalization as of 13 September 2018

- Financial performance for year ended December 2017 except Ramsay for the year ended June 2018

# Strategic Focus on Health Insurance

My First Class Healthcare @ BDMS by Allianz Ayudhya : Exclusive Health Insurance at BDMS Network with High Coverage at THB 100 Million per Year



## 1st Class for you by World Class Health Care Service & World Class Health Protection



วงเงินสูงสุดถึง 100 ล้านบาทต่อปี  
ให้ความคุ้มครองสุขภาพ ในโรงพยาบาลเครือข่าย BDMS  
กว่า 45 โรงพยาบาลทั่วประเทศและทั่วมุมโลก



ครอบคลุมทุกการรักษาพยาบาล  
ทั้งผู้ป่วยใน ผู้ป่วยนอก  
ทันตกรรม คลอดบุตร และสาวยศ



ค่าตรวจสุขภาพ  
สูงสุดถึง 20,000 บาท/ปี  
สัญญาต้องปีผลบังคับต่อเนื่องมากกว่า 12 เดือน



บริการดูแลคุณตลอดการเจ็บป่วย  
การบริการดูแลคุณยามพักฟื้นที่บ้าน (Nursing care)



สิทธิประโยชน์เหนือระดับสำหรับลูกค้า HEALTH PRESTIGE  
ของบวญวันเกิดสุดพิเศษ และโทรศัพท์หมายเลขพิเศษสำหรับให้บริการด้านกรรมกรรรมของคุณ



# The Best Managed Healthcare Company in Asia by FinanceAsia



*thank you*  
for your votes

BDMS remains committed to be  
"Your Trusted Healthcare Network"



BDMS won Best Managed Healthcare Company in Asia from FinanceAsia's 18<sup>th</sup> Annual Best companies in Asia Poll which gathered over 140 responses from fund managers and analysts around the world



**2Q18 & 6M18 in review**

# Consolidated Financial Summary

## 2Q18 & 6M18 Results

	2Q18		6M18	
	Chg (yoy)	% to Revenue	Chg (yoy)	% to Revenue
<b>Operating income</b>	<b>+9%</b> (THB 18,729 mm)		<b>+12%</b> (THB 38,757 mm)	
<b>Patient revenue</b>	<b>+10%</b> (THB 17,799 mm)		<b>+13%</b> (THB 36,856 mm)	
<b>Breakdown by location</b>				
▪ Bangkok & Vicinity	+7%	59%	+10%	58%
▪ Upcountry	+14%	41%	+16%	42%
<b>Breakdown by nationality</b>				
▪ Thai	+11%	72%	+13%	70%
▪ International	+7%	28%	+10%	30%
<b>Breakdown by type of patients</b>				
▪ Outpatients	+10%	46%	+10%	45%
▪ Inpatients	+9%	54%	+14%	55%

# Consolidated Financial Summary

## 2Q18 & 6M18 Profitability Ratio

(THB mm)	2Q18	2Q17	Chg (yoy)	6M18	6M17	Chg (yoy)
EBITDA	3,853	3,366	+14%	8,786	7,156	+23%
EBITDA margin	20.5%	19.6%		22.7%	20.7%	
Core profit	2,043	1,596	+28%	4,962	3,569	+39%
Core profit margin	10.9%	9.3%		12.8%	10.3%	
Net profit	2,043	3,791*	(46)%	4,962	5,764*	(14)%
Net profit margin	10.9%	22.1%*		12.8%	16.7%*	

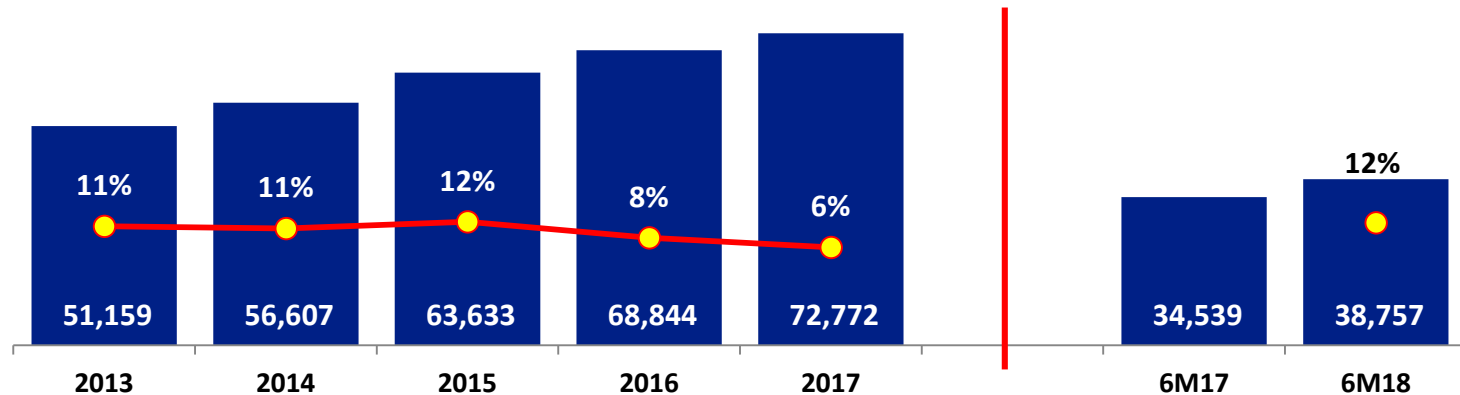
\* Including extra gain of THB 2,195 million (net of taxes) on partial sale of investment in Bumrungrad Hospital Public Co., Ltd. (BH)

## **Operational Statistics & Financial Highlights**

# Operating Income Growth

## Operating Income Trend

(THB mm)



## Commentary

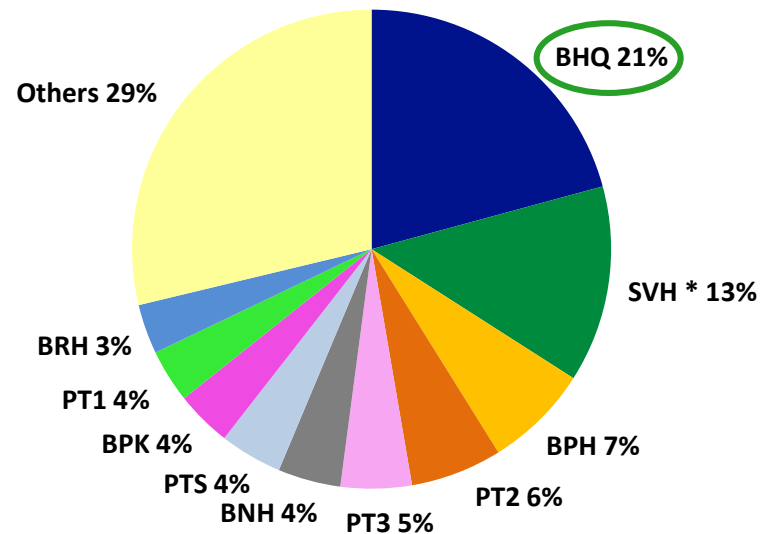
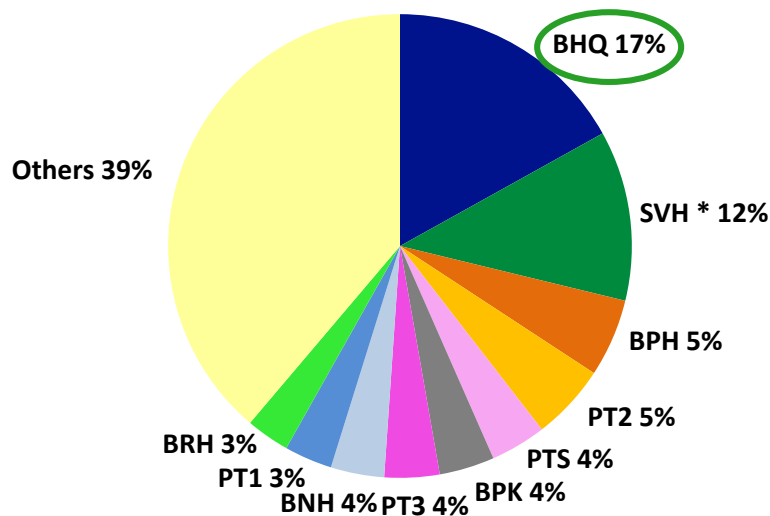
- 6M18 Operating income increased by 12% yoy mainly from
  - Patient revenue increased 13% yoy, attributed to
    - Solid growth from Center of Excellence
    - Expansion of insurance patients base
    - Increasing in influenza and outbreak during 1Q18
  - Revenue from sales of goods grew 10% yoy from increase in sales of The Medicpharma, A.N.B. Laboratories and Bangkok Save Drug

Remark:- Operating income is calculated from hospital revenue + revenue from sales of goods and food + other income

# Diversified Sources of Revenues and Profitability

## Operating Income Contribution in 6M18

## Total EBITDA Contribution in 6M18



## Commentary

- In 6M18, top 5 hospitals contributed 43% of total revenues and 52% of total EBITDA
- Key hospitals that drive revenue growth were SCH (+49%), BKN (+36%), BCM (+27%), BSN (+25%), PT3 (+16%), BRH (+16%), SSH (+15%) and PTS (+14% yoy)

\* SVH also included SNH performance

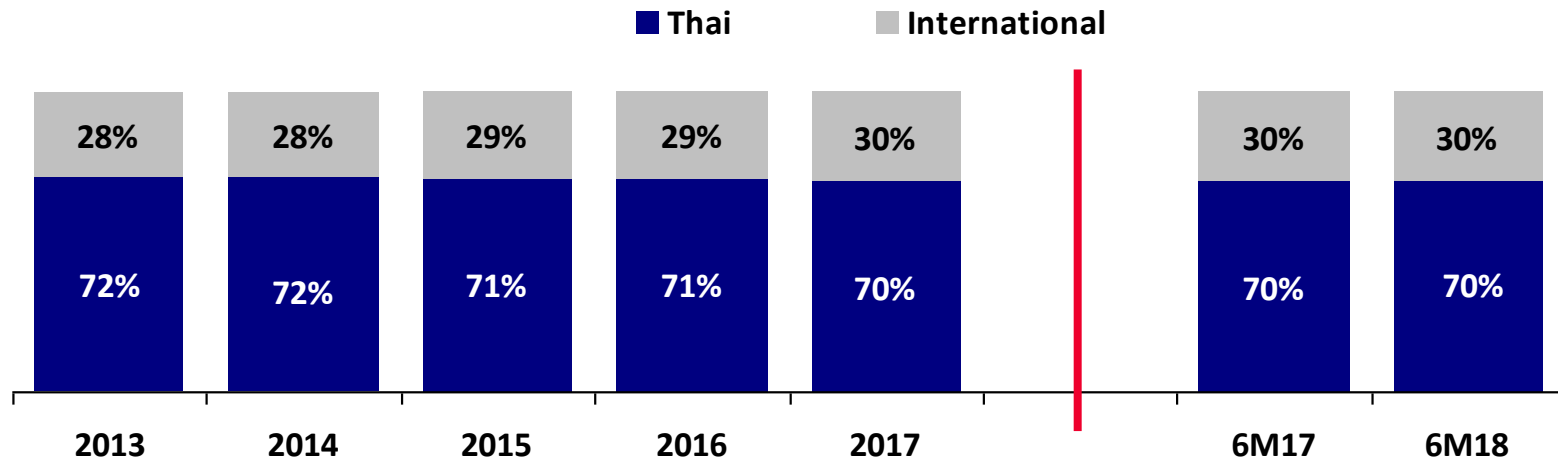
Remark: - Operating income is calculated from hospital revenue + revenue from sales of goods and food + other income

- EBITDA is calculated from revenue from hospital operations + revenue from F&B + other income – cost from hospital operations – SG&A expenses

- Hospital abbreviation shown on Appendix

# Thai and International Patients

## Revenue Contribution by Nationality

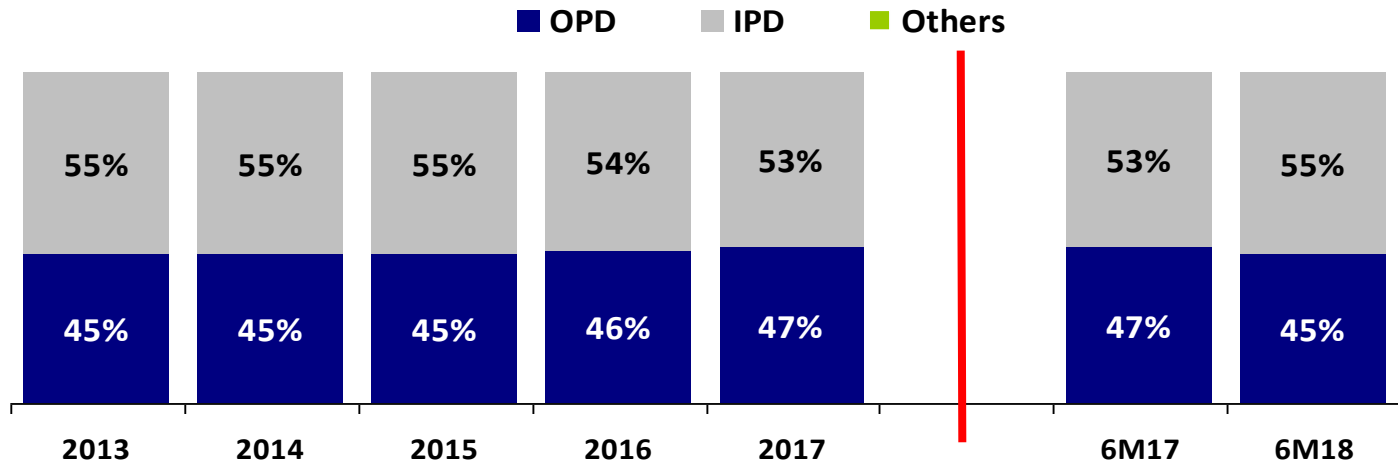


## Commentary

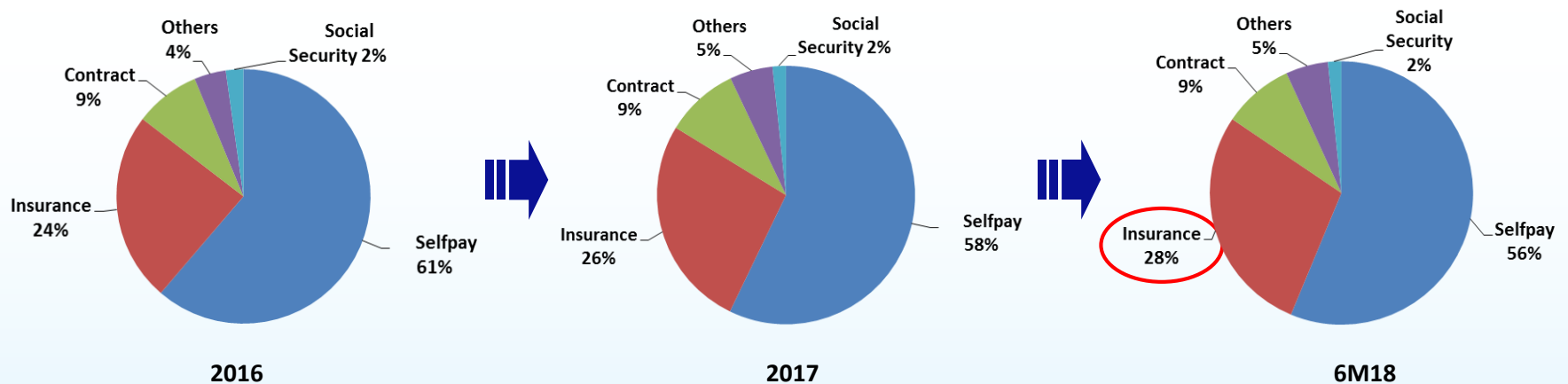
- 6M18 revenues from Thai patients grew 13% yoy while international patients grew 10% yoy
  - Top 5 international patient revenues are from Japan, China, UK, Myanmar and USA which contribute 2.1%, 1.8%, 1.6%, 1.6% and 1.5% of total patient revenues respectively
  - Key growth for International patient revenues are Kuwait (+80%), China (+30%) and Cambodia (+19% yoy)

# Patient Mix

## Revenue Breakdown by Patient Types



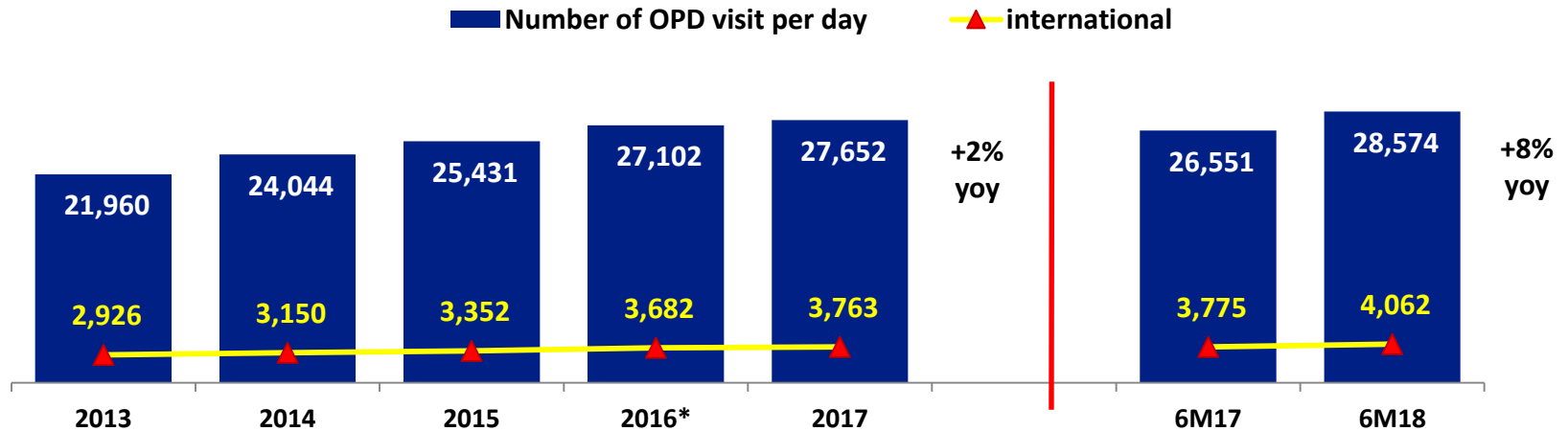
## Patient Revenue by Payor: Increasing Insurance Portion



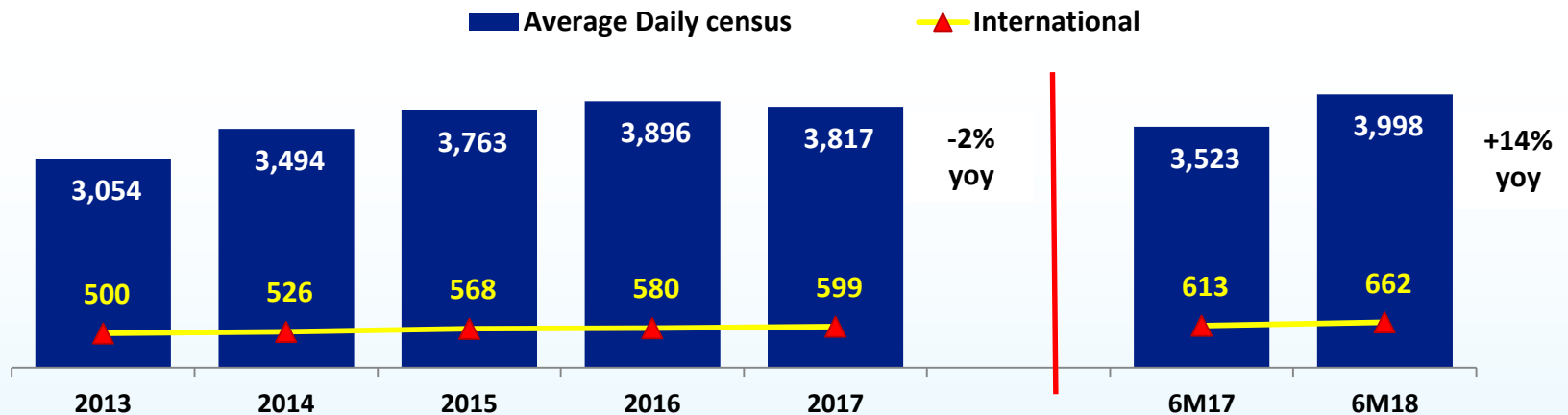


# Patient Volume

## Number of OPD Visits per Day



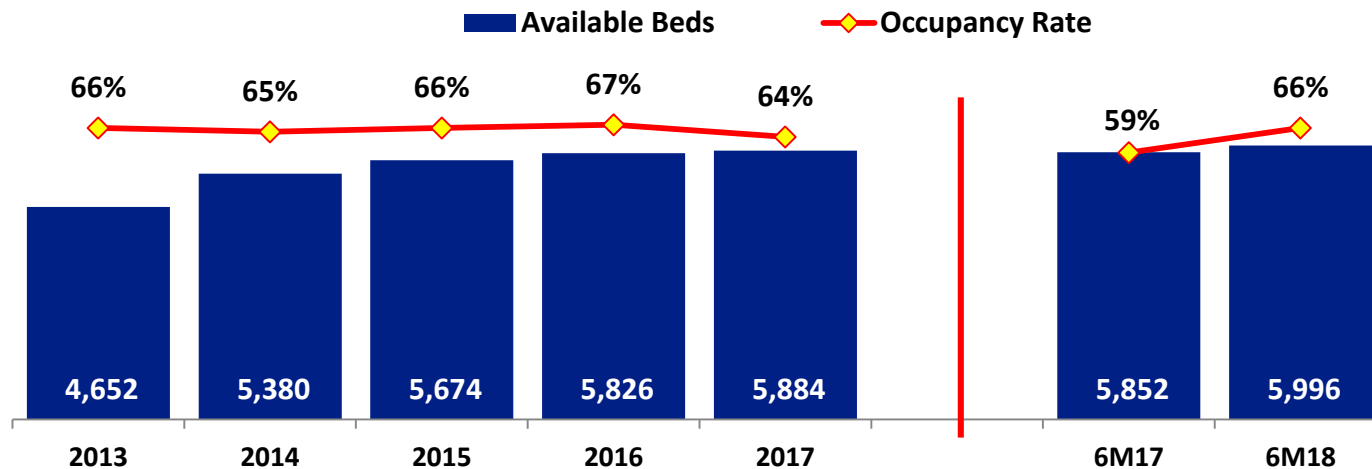
## Average Daily Census ( ADC )



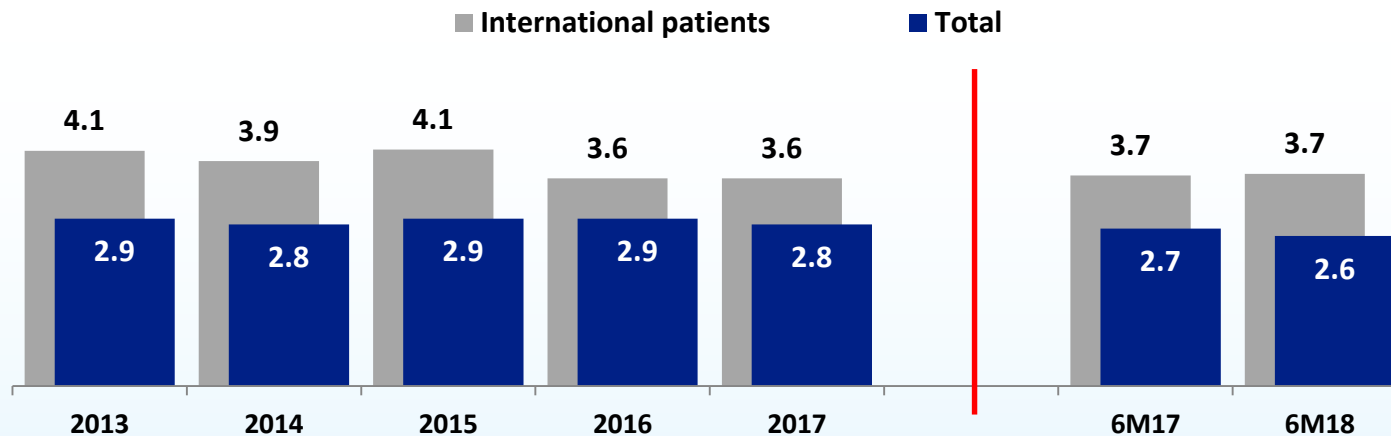
Remarks: - Including social security

# Utilization of Beds

## Occupancy Rate Based on Available Beds



## Average Length of Stay (days)

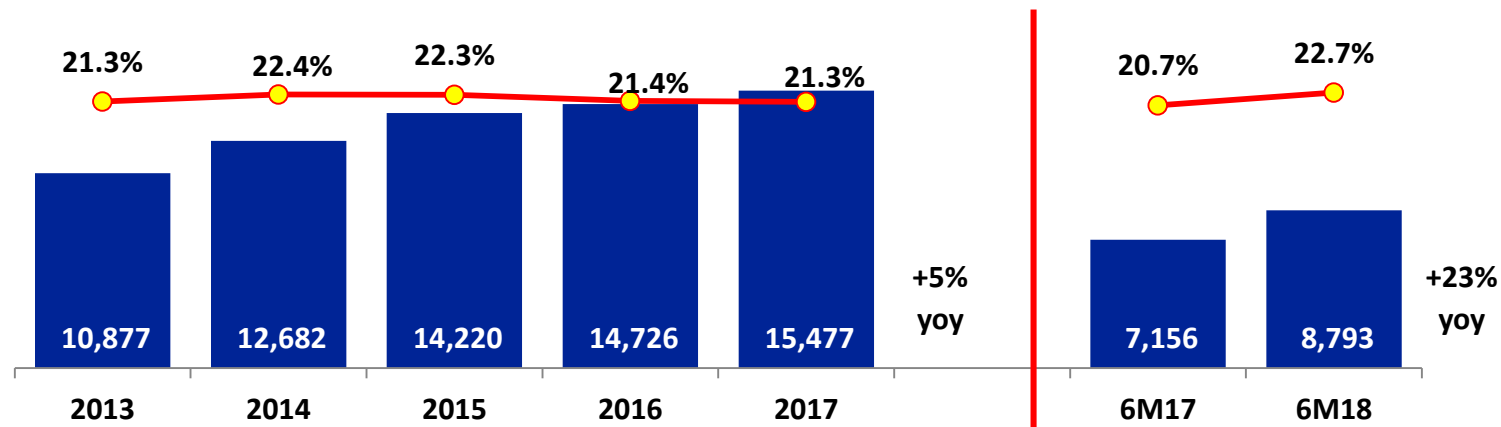


Remarks:- Including social security patients

# Profitability Trend

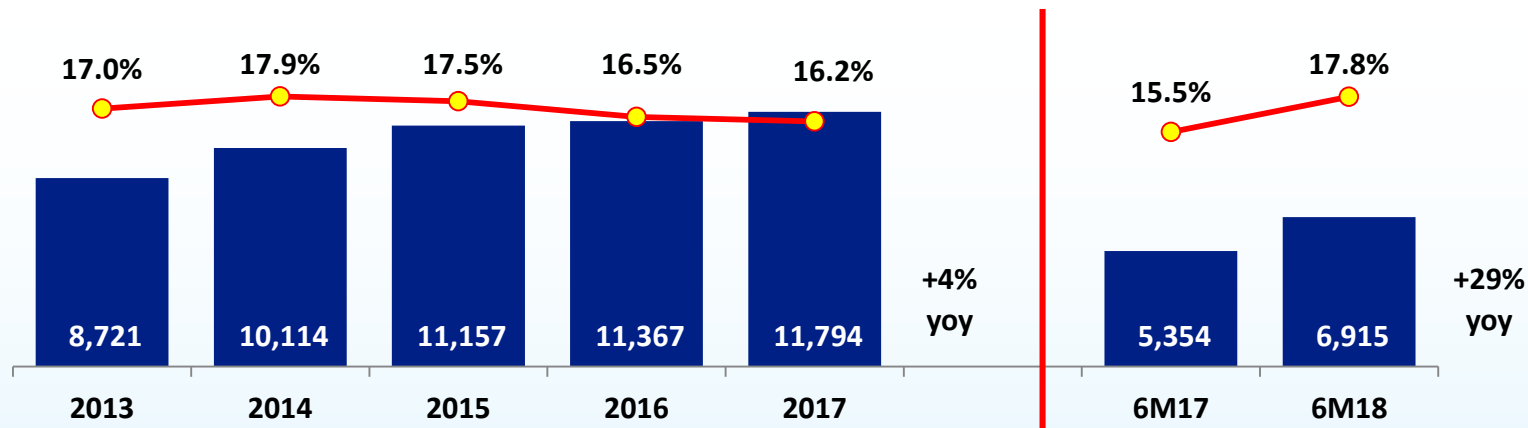
## EBITDA & EBITDA Margin

(THB mm)



## EBIT & EBIT Margin \*

(THB mm)

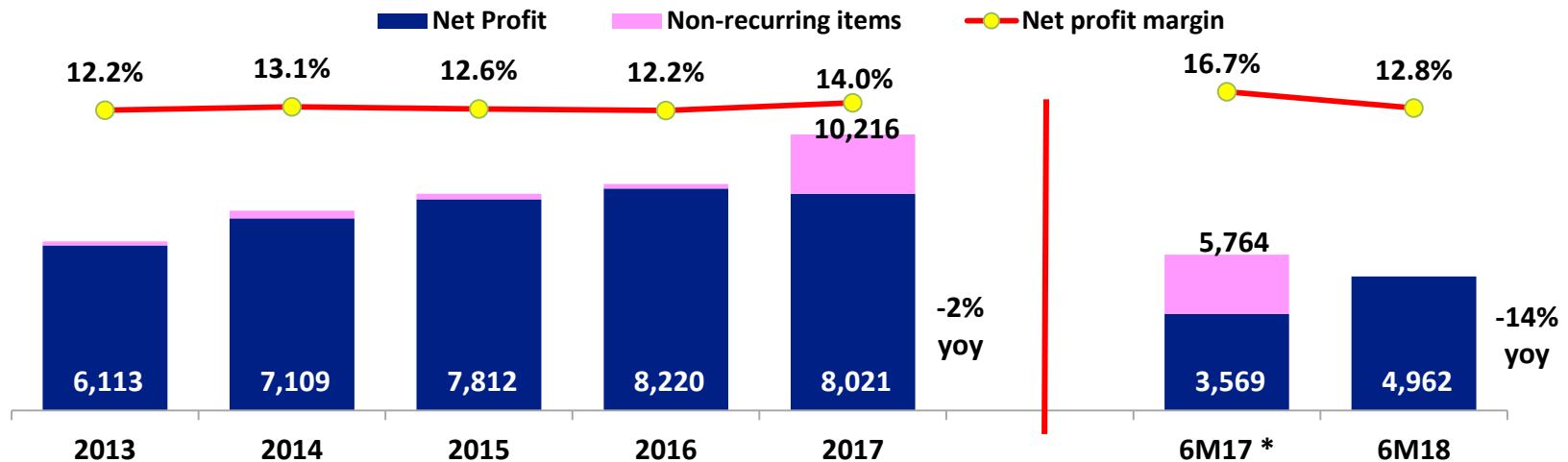


\* Excluding non-recurring items

# Profitability Trend

## Net Profit & Net Profit Margin

(THB mm)



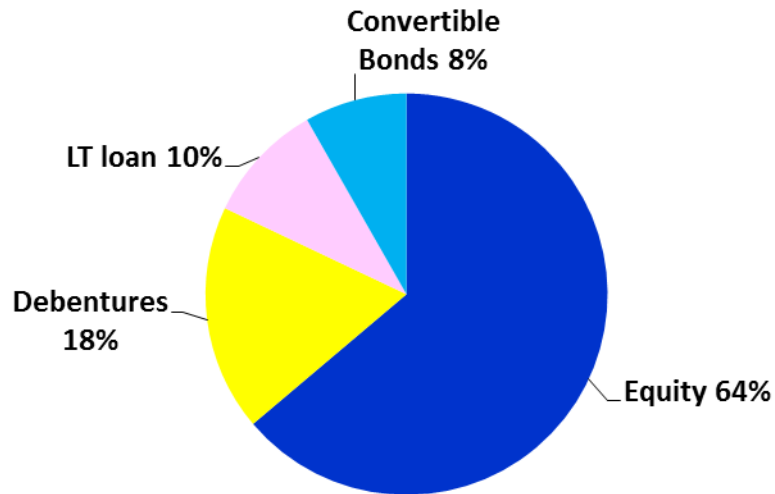
\* If excluding non-recurring item, net profit margin in 6M17 would be 10.3%

## Commentary

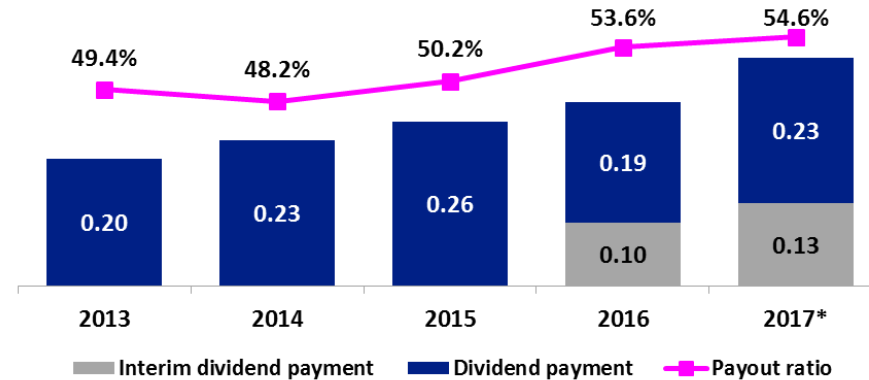
- In 6M18, net profit were THB 4,962 million with net profit margin of 12.8%
- If excluded gain on sales of investment in BH of Baht 2,195 mm in 6M17, net profit grew 39% yoy mainly from
  - Strong revenue growth
  - Continued cost containment measures
  - Decrease in finance expenses

# Capital Management

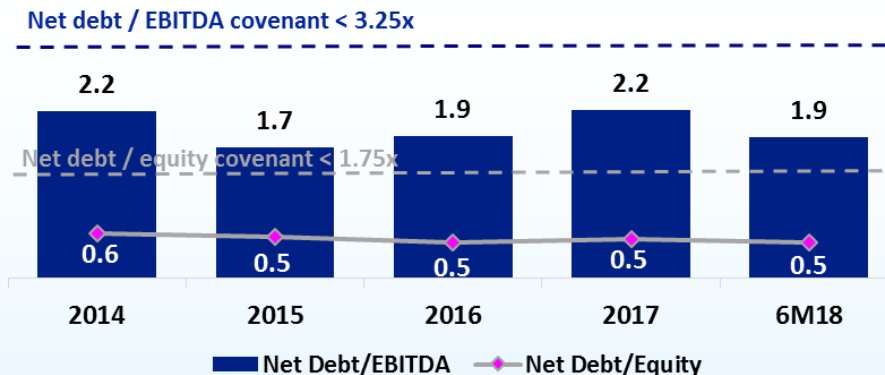
## Capital Structure as of June 2018



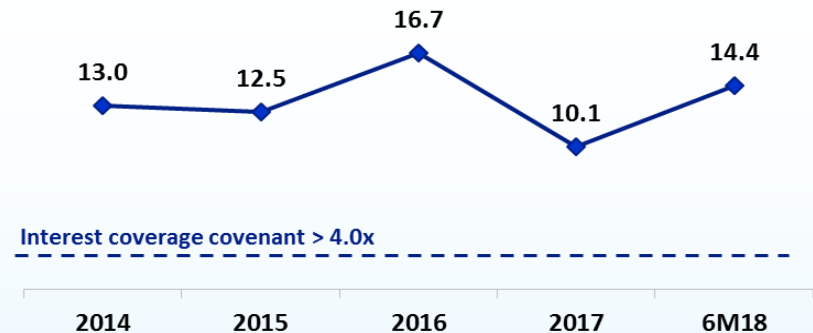
## Dividend Payment & Payout Ratio



## Gearing Ratios: Well Within Covenants



## Interest Coverage



## Healthcare Industry

# Key Trend for Thai Healthcare Industry

## Supportive Demographic and Economic Trends

- Aging demographics and rising income support growth of Thai healthcare
- Thailand as top tourist destination, capable medical personnel, convenient infrastructure & facilities and value for money attract medical tourism

## Healthy Trend

- Increase health conscious lifestyle driven demand on preventive care
- Shifting from traditionally treatment-based approach to preventive care which focuses on individual genetic, wellness, early detection, vaccination, diet and exercise including mental health awareness

## Health Insurance

- Insurance companies increase co-operation with local hospitals to increase Thailand's private health insurance penetration
- Thai Government approved tax break on premiums paid for health insurance supporting an increase in healthcare demand

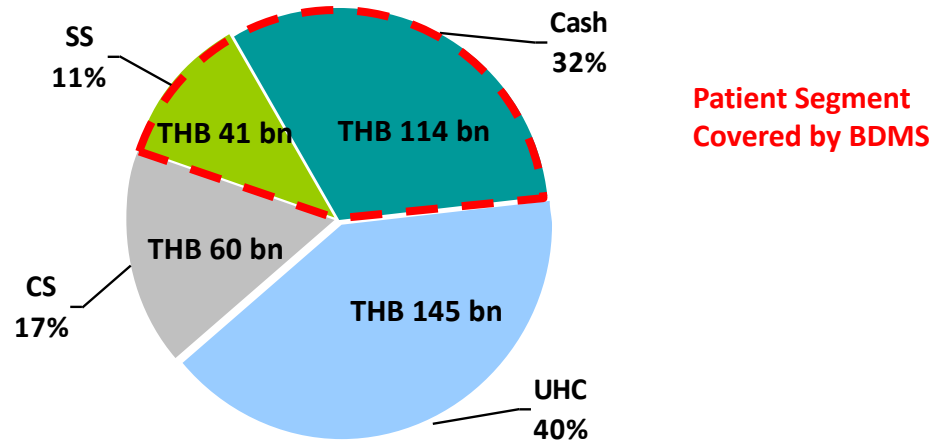
## Health Tech

- Mobile health apps would increase health conscious and preventive care
- Support existing healthcare service rather than replacement
- Mostly in searching for doctor and personal health information

# Thailand Healthcare Coverage

## Healthcare Segments in Thailand

Total Expenditure for 2014: THB 360 bn\*



\* Excluding general government expenditure on healthcare  
Source: SSO, NHSO, WHO, BOT, Phatra Securities estimates

<b>Universal Healthcare Coverage (UHC)</b>	A welfare program for Thai people to receive medical coverage for IPD and OPD care at registered facilities
<b>Civil Servant (CS)</b>	A welfare program provided to employees of governments and state-owned enterprises
<b>Social Security Scheme (SS)</b>	Minimum requirement of healthcare provided to employees of private companies
<b>Private Healthcare (Cash)</b>	Proportion of Thai population not covered or choose not to use public healthcare schemes (UHC, CS and SS), though may have private insurance coverage



# Thailand Healthcare Demand & Supply

## Healthcare Supply in Thailand (2014)

	# of Hospitals	# of Beds
Private	329	34,567
Public	1,019	120,322
<b>Total</b>	<b>1,348</b>	<b>154,889</b>

(Number per 10,000 population)	Thailand	Global
Doctor	4	14
Nurse	21	30
Bed	21	26

Source: WHO, Department of Health Service Support, Bureau of Policy and Strategy

## BDMS Market Coverage (2014)

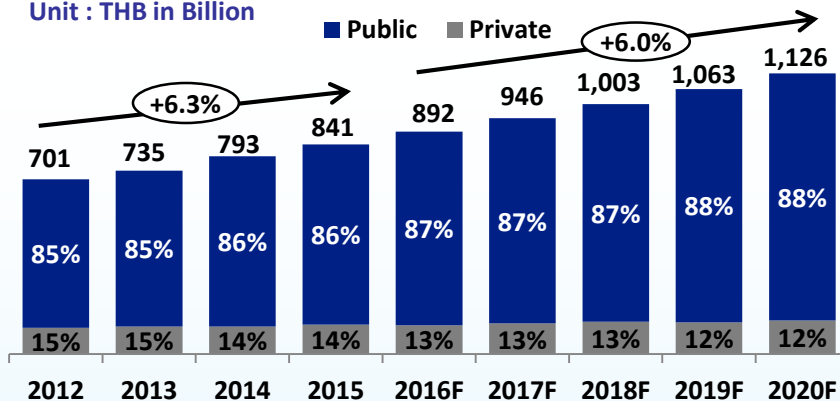
	Total Private Beds	BDMS Registered Beds *	Market Share
Bangkok	14,339	2,871	20%
Central	10,654	2,004	19%
South	2,467	662	26%
Northeast	2,904	337	12%
North	4,128	194	5%
<b>Total</b>	<b>34,492</b>	<b>6,014</b>	<b>17%</b>

\* Company data as of 2017

Source: WHO and Department of Health Service Support

## Increasing Healthcare Expenditures in Thailand

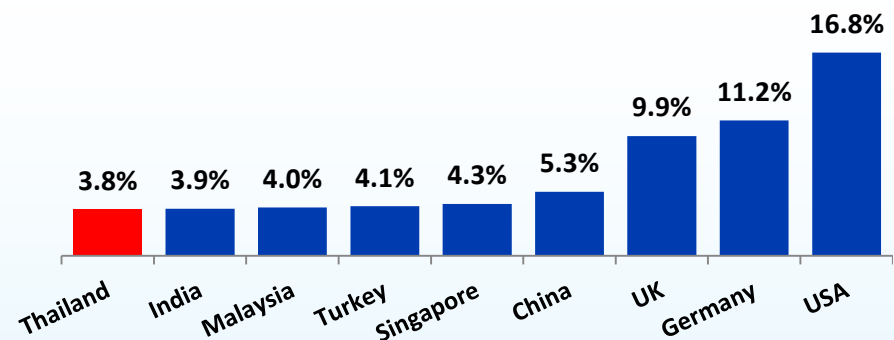
Unit : THB in Billion



Source : EIC SCB and WHO

## Low Healthcare Penetration

% of Healthcare expenditure to GDP

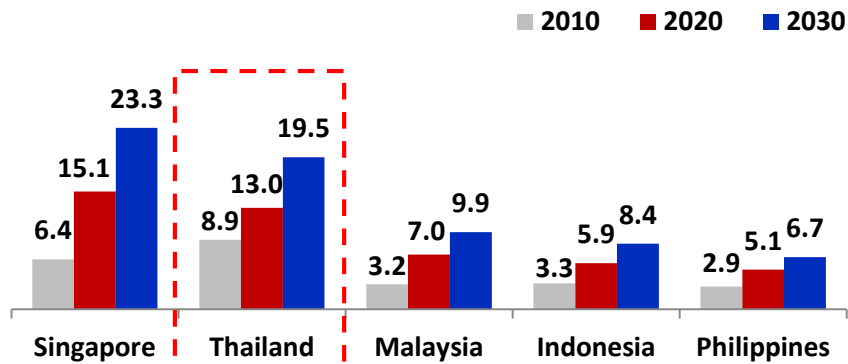


Source: WHO (2015)

# Increasing Healthcare Demand

## Population Growth and Aging Profile

Percentage of population above 65 years (%)

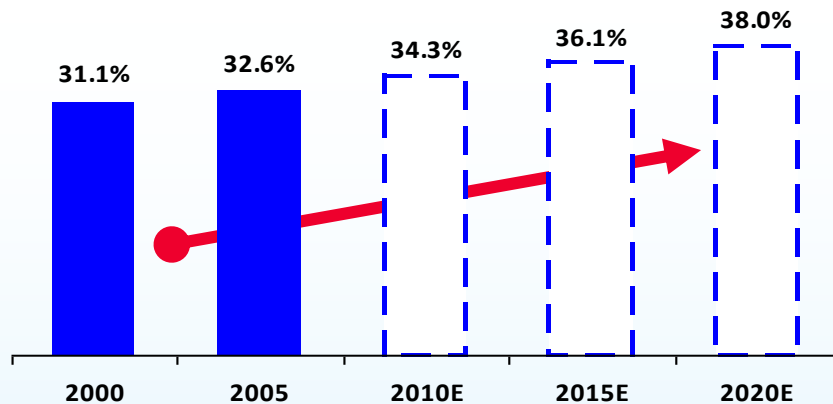


Source: UN Population Database: 2015

## Commentary

- Aging population will have great implications on both healthcare costs as well as its capacity to serve demand. In addition, aging population also means a strain on healthcare capacity if it fails to catch up well with increasing demand
- Increasing degree of urbanization is expected over time from 31.1% in 2008 to 38.0% in 2020
- The trend has also been the same for overall South East Asia countries where rapid urbanization is expected from 36.7% in 2000 to 50.6% in 2025

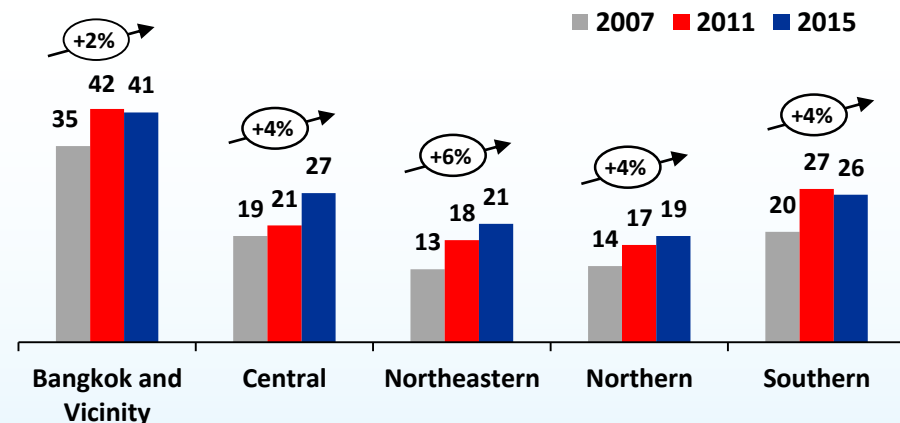
## Urbanization



Sources: NESDB, Health & Welfare Surveys, National Statistics Office (Data related to Thailand)

## Rising Monthly Income per Capita

Unit : THB Thousand



Source : NSO

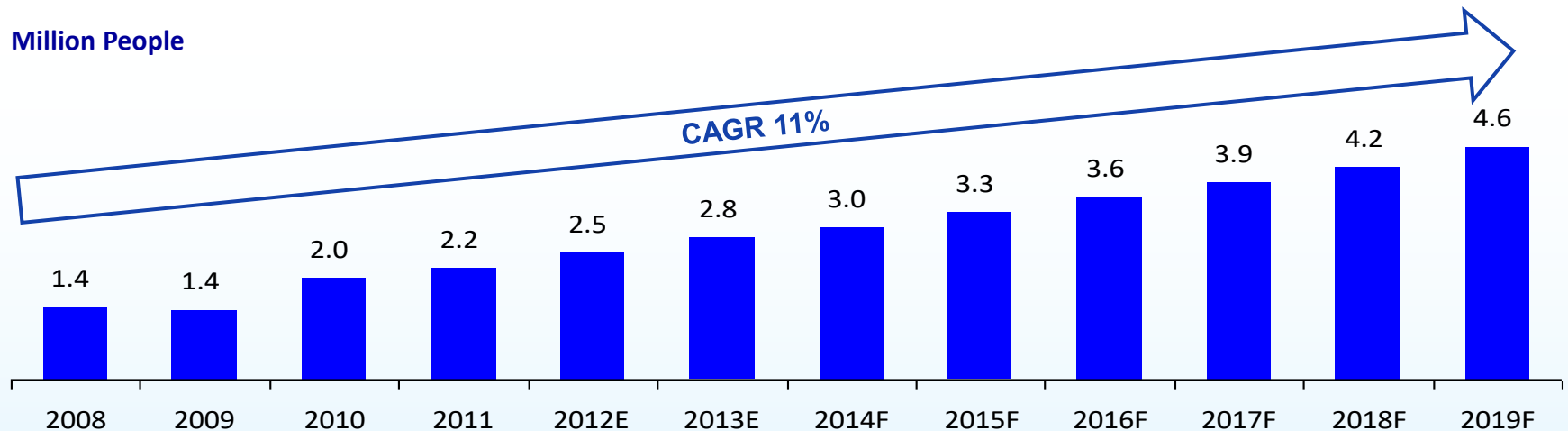
# Medical Tourism

## Chinese Tourists Drive Strong Growth of International Tourists Arrival to Thailand



Source: Tourism Authority of Thailand and Ministry of Tourism & Sports

## Increasing Trend of Medical Tourists to Thailand



Source: EIC, SCB and Ministry of Commerce

# Medical Tourism

## Medical Tourism as a Rising Phenomenon

Procedures ( In USD)	USA	Singapore	Thailand	Malaysia	India
Heart Bypass	123,000	17,200	15,000	12,100	7,900
Heart Valve Replacement	170,000	16,900	17,200	13,500	9,500
Knee Replacement	35,000	16,000	14,000	7,700	6,600
Spinal Fusion	110,000	12,800	9,500	6,000	10,300
IVF Treatment	12,400	14,900	4,100	6,900	2,500

Source: Medicaltourism.com (2016)

## Comparison Five Year Survival Rate of Primary Tumor

Primary Tumor	China	Taiwan	Japan	Germany	Hong Kong	USA	BDMS
Breast	73%	82.4%	84.7%	85.3%	90%	88.6%	94.8%
Lung	16.1%	14.3%	30.1%	16.2%	21%	18.7%	39.6%
Colorectal	47.2%	60%	62.3%	63.4%	60.9%	64.4%	78.5%

Sources: WHO, <http://www.thelancet.com>, <http://onlinelibrary.wiley.com> and Wattanosoth Cancer Registry 2014

# Sustainability Development

## Your Trusted Healthcare Network

### Good Corporate Governance

Practiced good Corporate Governance to ensure long-term growth and sustainability



### Employee Well-Being and Human Rights

Fully committed to support diversity and human rights in term of gender and cultural differences



### Environmental Friendly

Encouraged reductions of energy use without reducing the quality of care and raised awareness on efficient energy consumption



### Social and Community Development

Encouraged donation of medical supplies and equipment to unfortunate person  
Provided health check-up to promote health and well-being of communities

# Appendix

## Shareholding Structure

(As of 15 March 2018)

	% of Shareholding
1 Mr. Prasert Prasarttong-Osoth, M.D. and family	23.3%
2 Mr. Wichai Thongtang and family	7.5%
3 Bangkok Airways*	7.3%
4 The Viriyah Insurance Co., Ltd.	6.1%
5 Thai NVDR Co., Ltd.	5.3%
6 Social Security Office	4.1%
7 Mr. Chirothana Suchato, M.D. and family	2.6%
8 Ladpli family**	2.3%
9 Mr. Chuladej Yossundharakul, M.D. and family	1.9%
10 The Bank of New York Mellon	1.7%
<b>Total</b>	<b>62.1%</b>

Source: Summary of the information from Thailand Securities Depository Company Limited (TSD)

\* Consisted of Bangkok Airways PCL and Bangkok Airways Holding Co., Ltd

\*\* Consisted of Miss Napamas Ladpli, Mrs. Atinuch Malakul Na Ayudhaya and Mr. Parameth Ladpli

# Medical Cooperation

## International and Local Partnership

### Cancer



- Sister Institute with MD Anderson on cancer

### Occupational health, Pediatrics, Rehabilitation and Informatics



- Collaboration with Oregon Health and Science University on occupational health, pediatrics, rehabilitation, clinical simulation and informatics

### Trauma and Orthopedics



- Collaboration with Missouri Orthopaedic Institute, University of Missouri Health Care in education, training and research



- Collaboration with Hannover Medical School for education and research on trauma and orthopedics



- Collaboration with Stanford University for knowledge sharing on orthopedics



# Medical Cooperation

## International and Local Partnership

### Neuroscience



- Research collaboration with Department of Neurosurgery, Cedars-Sinai on the TRFS laser device for brain tumor surgery

- Collaboration with Black Brain Health Center of Dr. Keith L. Black, one of the world leading neurosurgeons

### Gastrointestinal



- Collaboration with Sano Hospital on Gastrointestinal Medicine

### Others



- Collaboration with Nagoya University for education, medical treatment assistance and patient referral



- Collaboration with local institutions

# Investments

## Investments in Other Hospitals : - Listed Companies

- Ramkhamhaeng Hospital PCL (RAM) 38.24%
- Bumrungrad Hospital PCL (BH) 20.50%

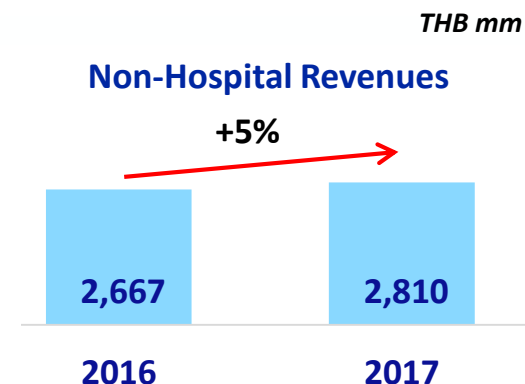
## Non- Hospital Strategic Investments \*

### Pharmaceutical Business

- A.N.B. Laboratories 100% Sterile pharmaceutical product manufacturer & distributor
- Save Drug Center 100% Drugstore
- The Medicpharma 87% Generic pharmaceutical product manufacturer
- General Hospital Products PCL 46% Sterile pharmaceutical product manufacturer

### Other Complimentary Business

- National Healthcare Systems 100% Central lab, central supply chain, procurement & other shared services
- Greenline Synergy 100% Shared IT services
- Bangkok Premier Life Insurance Broker 100% Health & life insurance broker
- Bangkok Helicopter Services 100% Transportation of patients via helicopter services



\* Not included all BDMS' investments

**Group 1 (Bangkok&West&Cambodia) Ownership No. of Beds**

1. Bangkok Hospital	100%	373
2. Bangkok Heart Hospital	100%	97
3. Wattanosoth Hospital	100%	48
4. Bangkok Huahin (BHN)	100%	64
5. Bangkok Sanamchan (BSN)	100%	210
6. Thepakorn (TPK)	44.5%	100
7. Bangkok Phetchaburi (BPR)	100%	255
8. Bangkok Muangraj (BMR)	100%	142
9. Royal Phnom Penh (RPH)	100%	100
10. Royal Angkor International (RAH)	80.0%	30

**Group 2**

11. Samitivej Sukhumvit (SVH)	95.8%	275
12. Samitivej Srinakarin (SNH)	95.8%	400
13. Samitivej Sriracha (SSH)	70.1%	184
14. Samitivej Thonburi (STH)	63.5%	150
15. Samitivej Chonburi (SCH)	100%	220
16. Samitivej Chinatown (SCT)	100%	59
17. BNH Hospital (BNH)	91.5%	144

**Group 3 (East)**

18. Bangkok Pattaya (BPH)	97.3%	400
19. Bangkok Rayong (BRH)	100%	220
20. Bangkok Chanthaburi (BCH)	99.7%	170
21. Bangkok Trat (BTH)	99.8%	114
22. Sri Rayong (SRH)	100%	195

**Group 4 (North&Northeast)**

23. Bangkok Chiangmai (BCM)	100%	175
24. Bangkok Ratchasima (BKH)	91.4%	180
25. Bangkok Pakchong (BHP)	91.4%	31

**Group 4 (North&Northeast)**

26. Bangkok Udon (BUD)	100%	120
27. Bangkok Phitsanulok (BPL)	100%	195
28. Bangkok Khon Kaen (BKN)	100%	140

**Group 5**

29. Phyathai 1 (PT1)	100%	224
30. Phyathai 2 (PT2)	99.2%	260
31. Phyathai 3 (PT3)	98.2%	267
32. Phyathai Sriracha (PTS)	75.1%	350
33. Phyathai Nawamin (PTN)	99.8%	140
34. Paolo Paholyothin (PLP)	100%	267
35. Paolo Samutprakarn(PLS)	93.6%	200
36. Paolo Chokchai 4 (PLC)	85.7%	169
37. Paolo Rangsit (PLR)	100%	150
38. Paolo Kaset (PLK)	100%	162
39. Paolo Phrapradaeng (PLD)	84.0%	60

**Group 6 (South)**

40. Bangkok Phuket (BPK)	99.7%	266
41. Siriroj International (SIH)	100%	151
42. Dibuk (DBK)	99.7%	100
43. Bangkok Hat Yai (BHH)	98.8%	200
44. Bangkok Samui (BSH)	100%	52
45. Bangkok Surat (BSR)	100%	150

**Group 7: Non-Hospital**

1. National Healthcare System	100%
2. Bio Molecular Laboratories	95.0%
3. The Medicpharma	87.1%
4. A.N.B Laboratories	100%
5. Save Drug Center	100%
6. General Hospital Products	46.0%

Remark:- Number of beds is structured beds