

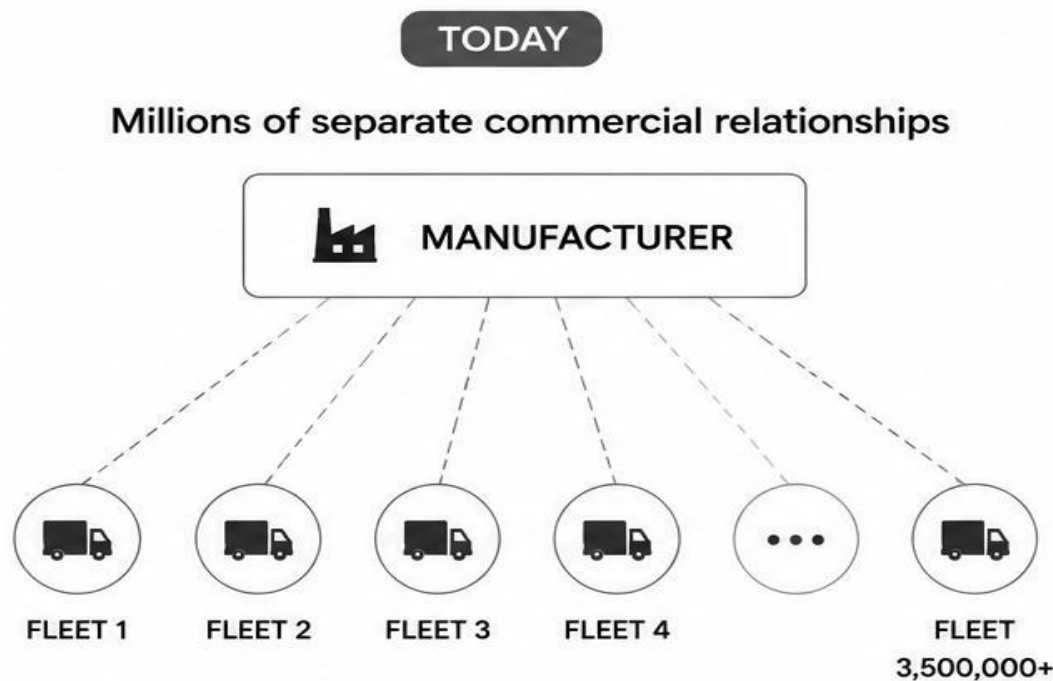
**3.5 million
truck operators.**

Purchasing separately.

What if they purchased as one?

The transport industry buys like **retail**.

Millions of negotiations. Zero enterprise leverage.



Manufacturers reward scale. **Fragmentation prevents it.**

TONNE

Makes 3.5 million transport businesses
buy like one enterprise.



Manufacturers gain
one enterprise relationship.



Transport businesses
retain their independence.

Why no one built the demand chain.

WHO COULD HAVE BUILT IT?		WHY THEY DIDN'T	
	OEMs (Michelin, MRF, Apollo, etc.)	→ Cannot be demand-neutral. They only represent their own products.	 Supply-first
	Dealers	→ Compete with each other. No incentive to organize demand beyond their territory.	 Territory-first
	Marketplaces (IndiaMART, B2B platforms, etc.)	→ Connect buyers and sellers but don't become the buyer or negotiate enterprise terms.	 Transaction-first
	Large Fleet Operators	→ Build buying power only for themselves, not the industry.	 Self-interest
	Transport Businesses (3.5 million+)	→ Too fragmented to coordinate and negotiate at scale.	 Fragmented
	TONNE	→ Built solely to organize fragmented demand across the industry.	 Demand-first



Every incumbent is designed to optimize supply. **TONNE** is designed to organize **demand**.

The Missing Layer.

Every participant in the transport ecosystem optimizes for their own interests.

No one can represent **the market**.

THE OLD REALITY: SILOS WITH CONFLICTING INCENTIVES



OEMs

Optimize for their own brands and margins.

Can't represent competing OEMs.



Dealers

Optimize for their own inventory and profits.

Can't recommend competing dealers.



Fleet Owners

Optimize for their own fleet outcomes.

Can't coordinate fragmented demand.



Financial Institutions

Optimize for risk and lending returns.

Can't become a neutral commercial coordinator.



No entity can connect everyone without choosing sides.



TONNE

The Neutral Commercial Infrastructure

Represents the market. Aligns every participant.
Coordinates demand. Enables better commercial outcomes for all.



Every major industry eventually develops a neutral coordination layer.
Transport is the last trillion-rupee industry that still doesn't have one.



3.5M+
Transport businesses awaiting coordination.

We start where procurement pain is highest.

Then we **expand with the same buyer.**

3.5 million transport businesses. One commercial operating layer.

MARKET BY FLEET SIZE (BY # OF VEHICLES)



EXPANSION PATH (SEQUENTIAL)



ANNUAL RECURRING COMMERCIAL SPEND BREAKUP*	 TYRES ₹1,05,000 Cr 31%	 LUBRICANTS ₹52,500 Cr 15%	 BATTERIES ₹41,500 Cr 12%	 INSURANCE ₹1,00,000 Cr 29%	 REPAIRS & SPARES ₹67,500 Cr 20%	 VEHICLE FINANCE ₹77,500 Cr 23%	TOTAL RECURRING COMMERCIAL SPEND* ₹3.4 Lakh Crore*
All numbers approximate							

*Bottom-up estimate based on industry reports, expert interviews and internal analysis. Detailed assumptions and model available upon request.

The more TONNE grows, the harder it is to compete.

Three compounding moats that competitors can't replicate.



1

LARGEST PURCHASING NETWORK

- ✓ More fleets on TONNE
- ✓ Higher purchasing power
- ✓ Best commercial terms
- ✓ Lower prices, better quality, more services



Better economics
at every scale



2

LARGEST DEMAND INTELLIGENCE LAYER

- ✓ Millions of recurring purchases
- ✓ Richer data at every layer (fleet, vehicle, route, region, spend)
- ✓ Superior demand intelligence (forecasting, planning, price discovery)
- ✓ Better decisions for OEMs & fleets



Data advantage compounds
with scale and time



3

DEEPEST OEM RELATIONSHIPS

- ✓ OEMs & suppliers integrate deeply
- ✓ Exclusive commercial programs
- ✓ Finance partners provide working capital
- ✓ Fleets transact, plan & rely on TONNE



High switching costs.
Built to last.



Competitors can copy software. **They can't copy the network.**

Built From **Zero**. Repeatedly.

Over 12 years, I have been trusted to build new growth engines from zero—across regions and industries.

Every time, I encountered the same truth: **demand is fragmented, but scale is consistently rewarded.**



TONNE

Applies every lesson to one problem.

Enterprise buying power for independent transport businesses.

From building channels to building businesses, and finally building a full digital lending engine—
my journey has been about one thing: creating new growth engines that solve real problems.