



PHARMA MONITOR

Strategic Insights On Pharma Market Trends

Month Apr-25



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Therapy Monitor



Evolution Index (EI)

In the pharmaceutical industry, the Evolution Index is a crucial tool for strategic decision-making. It measures a product's growth relative to its market, offering valuable insights for maximizing profitability and navigating market competition effectively. With a range from -100 to positive values, this index enables companies to make informed, flexible decisions and stay ahead in a competitive landscape.

Analyzing the evolution index over time in combination with the current sales gives us clear picture how the company products are competing on the market against the total market sales.

$$\text{Evolution Index} = \frac{100 + (\text{Brand Growth\%}) \times 100}{100 + (\text{Market Growth\%}) \times 100}$$

Therapy Monitor

IPM registered a healthy growth of 7.8% for the month of Apr'25, with all therapies recording encouraging growth.

The cardiac segment registered the highest growth at 10.98%, along with the highest sales value. This reflects a significant expansion in cardiac-related drug sales over the past few year. According to an article on PubMed, the prevalence of coronary artery disease (CAD) in urban India has escalated from 1–2% in the 1960s to approximately 10–12% in recent years. Rural areas have also witnessed an increase—from 2–3% to 4–6% over the same period. Cardiovascular diseases (CVDs) now account for 27% of all deaths in India, highlighting the significant health burden and corresponding demand for cardiac medications.

The respiratory segment also showed strong growth of 7.66%, indicating rising demand in this therapeutic area. This could be attributed to factors such as an increase in the prevalence of respiratory illnesses and the launch of new products. Respiratory diseases constitute 15.3% of all prescriptions in India, making it the largest disease category. Air pollution, estimated to cause 670,000 deaths annually in India, significantly exacerbates conditions like chronic bronchitis and asthma.

Gastrointestinal segment has seen a consistent growth in the past decade due to rapid urbanization and dietary shifts. A significant surge in gastrointestinal disorders, including acid reflux and indigestion, keep driving the demand for related medications. For the month of Apr 25, GI registered 7.26% growth over Apr 24.

Other segments, including Pain/Analgesics (7.01%), Vitamins, Minerals, and Nutrients (VMN) (6.26%), Anti-Diabetic (5.60%), and Anti-Infectives (5.65%), also demonstrated healthy growth, reflecting consistent demand and market expansion across these key therapy areas

| SUPER GROUP | MTH Apr 25 | | | | |
|--------------------------------------|----------------|-------------|----------|------|---------------|
| | VAL | % Gr | % Contri | EI | Incr Gain |
| IPM | 19710.6 | 7.8% | | | 1424.3 |
| CARDIAC | 2751.2 | 11.0% | 13.96% | 103% | 272.2 |
| GASTRO INTESTINAL | 2469.6 | 7.3% | 12.53% | 100% | 167.2 |
| ANTI-INFECTIVES | 2168.8 | 5.7% | 11.00% | 98% | 116.0 |
| ANTI DIABETIC | 1795.2 | 5.6% | 9.11% | 98% | 95.2 |
| VITAMINS / MINERALS / NUTRIENTS | 1773.7 | 6.3% | 9.00% | 99% | 104.5 |
| PAIN / ANALGESICS | 1360.6 | 7.0% | 6.90% | 99% | 89.2 |
| RESPIRATORY | 1358.3 | 7.7% | 6.89% | 100% | 96.7 |
| NEURO / CNS | 1344.5 | 8.8% | 6.82% | 101% | 108.2 |
| DERMA | 1269.5 | 7.4% | 6.44% | 100% | 86.9 |
| GYNAECOLOGICAL | 633.5 | 1.6% | 3.21% | 94% | 10.2 |
| BLOOD RELATED | 622.9 | 12.7% | 3.16% | 105% | 70.0 |
| ANTI-NEOPLASTICS | 463.5 | 12.5% | 2.35% | 104% | 51.5 |
| OPHTHAL / OTOLOGICALS | 388.0 | 7.8% | 1.97% | 100% | 28.1 |
| UROLOGY | 331.6 | 14.5% | 1.68% | 106% | 42.1 |
| HORMONES | 327.5 | 10.8% | 1.66% | 103% | 32.0 |
| OTHERS | 186.0 | 17.5% | 0.94% | 109% | 27.7 |
| VACCINES | 180.5 | 6.5% | 0.92% | 99% | 11.0 |
| STOMATOLOGICALS | 132.4 | 9.1% | 0.67% | 101% | 11.0 |
| SEX STIMULANTS / REJUVENATORS | 105.5 | 1.8% | 0.54% | 94% | 1.9 |
| ANTI MALARIALS | 47.7 | 5.9% | 0.24% | 98% | 2.7 |

<= 94%

95- 105%

>= 106%

Corporate Monitor



Corporate Monitor

#1 - 20

Several Corporates among the top 20 outpaced overall market growth, driven by therapy-focused strategies and strong brand performance.

Sun Pharma led with robust growth in neurology (Oxcarbazepine, Brivaracetam, Desvenlafaxine + Escitalopram), pain (Tapentadol, Trypsin combos), diabetes (Sitagliptin combos), and gastroenterology (Lactitol + Isphagula).

Torrent Pharma delivered strong cardiac sales (Nebivolol, Rosuvastatin combos, Nicorandil), gastro (Domperidone + Esomeprazole, Papain enzymes), and CNS (Pregabalin, antidepressants), alongside diabetes therapies.

Alkem saw gains across pain (Paracetamol), anti-infectives (Amoxicillin + Clavulanic acid), gastro (Domperidone + Pantoprazole), and VMN (Cholecalciferol).

Intas posted double-digit growth through neurology (antiepileptics, antipsychotics), oncology (Denosumab), and diabetes (Voglibose combos).

Cipla maintained leadership in respiratory (asthma, COPD), while cardiac (Torsemide) and anti-infectives (Meropenem, Valaciclovir, Amphotericin B) contributed significantly.

Dr. Reddy's grew in probiotics (Saccharomyces Boulardii), dermatology (Minoxidil), and respiratory (cough & cold).

IPCA gained from analgesics (Aceclofenac), anti-malarials (Chloroquine), and antibacterials (Cefoperazone + Sulbactam).

These players capitalized on chronic therapy demand, differentiated portfolios, and execution excellence to outperform the broader IPM

| Rank | SUPER GROUP | MTH Apr 25 | | | | | |
|------|-------------|----------------|-------------|-------------|---------|-------------|---------------|
| | | VAL | % Gr | % MS | G/L %MS | EI | Incr Gain |
| | IPM | 19710.6 | 7.8% | 100% | | 100% | 1424.3 |
| 1 | SUN* | 1683.1 | 13.7% | 8.54% | ▲ | 105% | 202.7 |
| 2 | ABBOTT* | 1141.1 | 7.7% | 5.79% | ▬ | 100% | 81.7 |
| 3 | MANKIND* | 1127.8 | 4.3% | 5.72% | ▼ | 97% | 46.9 |
| 4 | CIPLA | 1019.1 | 11.6% | 5.17% | ▲ | 104% | 106.3 |
| 5 | ALKEM* | 792.1 | 12.1% | 4.02% | ▲ | 104% | 85.5 |
| 6 | INTAS | 761.7 | 11.9% | 3.86% | ▲ | 104% | 81.0 |
| 7 | TORRENT | 751.9 | 14.1% | 3.81% | ▲ | 106% | 92.8 |
| 8 | LUPIN | 694.6 | 8.0% | 3.52% | ▬ | 100% | 51.4 |
| 9 | ZYDUS* | 633.0 | 8.4% | 3.21% | ▲ | 101% | 49.3 |
| 10 | DR. REDDYS | 600.0 | 11.1% | 3.04% | ▲ | 103% | 59.9 |
| 11 | MACLEODS | 562.2 | 4.0% | 2.85% | ▼ | 96% | 21.6 |
| 12 | ARISTO | 531.4 | 2.4% | 2.70% | ▼ | 95% | 12.4 |
| 13 | EMCURE* | 498.9 | 5.9% | 2.53% | ▼ | 98% | 27.6 |
| 14 | GSK | 425.2 | 8.9% | 2.16% | ▲ | 101% | 34.7 |
| 15 | GLENMARK | 424.2 | 7.6% | 2.15% | ▬ | 100% | 30.1 |
| 16 | USV | 410.0 | 4.5% | 2.08% | ▼ | 97% | 17.7 |
| 17 | IPCA | 393.8 | 11.0% | 2.00% | ▲ | 103% | 39.2 |
| 18 | MICRO | 284.1 | 1.1% | 1.44% | ▼ | 94% | 3.0 |
| 19 | PFIZER* | 282.2 | 8.7% | 1.43% | ▲ | 101% | 22.7 |
| 20 | ERIS LS | 262.0 | 2.8% | 1.33% | ▼ | 95% | 7.0 |

<= 94%

95- 105%

>= 106%

Corporate Monitor

#21 - 40

Among the 21st to 40th ranked corporates, JB Chemicals, La Renon, P&G Health, Corona Remedies, and Bayer recorded robust double-digit growth, outperforming several peers in the IPM

JB Chemicals gained significant momentum, primarily due to the strong performance of its antihypertensive portfolio, especially Cilnidipine, which continues to see increasing demands across the country

La Renon performed exceptionally well in the Gastrointestinal therapy segment, led by Glutathione, a hepatic protector. It also saw strong traction in the anti-diabetic space, with consistent growth in Sitagliptin-based combinations, addressing the rising diabetic population.

P&G Health's growth was driven by its portfolio in vitamins, minerals, and nutrients (VMN), particularly the Vitamin E and D-Panthenol combination. Its nutraceutical segment also saw an uptick, led by Levocarnitine. Furthermore, growth in anti-anaemic preparations (Ferrous Fumarate + Folic Acid + Zinc) and respiratory products such as Oxymetazoline nasal sprays contributed meaningfully.

Corona Remedies registered impressive growth in the cardiac therapy segment with lipid-lowering agents like Rosuvastatin, and in gynaecology, particularly infertility treatments using Human Chorionic Gonadotropin. It also posted gains in the anti-diabetic segment with Voglibose-based combinations.

Bayer recorded stellar growth in cardiology, supported by diuretics and anti-thrombotic agents, and in gynaecology, led by its Estradiol portfolio.

Hegde & Hegde maintained its stronghold in dermatology, with continued growth also seen in respiratory therapies like the Montelukast + Levocetirizine combination, targeting asthma and COPD.

<= 94%

95- 105%

>= 106%

| Rank | SUPER GROUP | MTH Apr 25 | | | | | |
|------|---------------|----------------|-------------|-------------|---------|-------------|---------------|
| | | VAL | % Gr | % MS | G/L %MS | EI | Incr Gain |
| | IPM | 19710.6 | 7.8% | 100% | | 100% | 1424.3 |
| 21 | ALEMBIC | 234.5 | 1.8% | 1.19% | ▼ | 94% | 4.1 |
| 22 | JB CHEMICALS | 208.4 | 10.1% | 1.06% | ▲ | 102% | 19.1 |
| 23 | FDC | 185.9 | 5.1% | 0.94% | ▼ | 98% | 9.1 |
| 24 | SANOFI INDIA | 178.6 | 1.7% | 0.91% | ▼ | 94% | 3.0 |
| 25 | HIMALAYA | 154.8 | 8.7% | 0.79% | ▬ | 101% | 12.3 |
| 26 | LA RENON | 154.5 | 14.6% | 0.78% | ▲ | 106% | 19.7 |
| 27 | AJANTA | 153.7 | 7.5% | 0.78% | ▬ | 100% | 10.7 |
| 28 | P&G | 133.5 | 20.1% | 0.68% | ▲ | 111% | 22.3 |
| 29 | CORONA | 124.9 | 13.7% | 0.63% | ▲ | 106% | 15.1 |
| 30 | BAYER | 110.1 | 15.9% | 0.56% | ▲ | 108% | 15.1 |
| 31 | FRANCO | 109.7 | 4.5% | 0.56% | ▼ | 97% | 4.7 |
| 32 | SYSTOPIC | 106.1 | 8.0% | 0.54% | ▬ | 100% | 7.9 |
| 33 | HETERO | 103.9 | 8.5% | 0.53% | ▬ | 101% | 8.1 |
| 34 | INDOCO | 103.4 | 4.0% | 0.52% | ▼ | 97% | 4.0 |
| 35 | CADILA | 102.5 | -10.6% | 0.52% | ▼ | 83% | -12.2 |
| 36 | BLUE CROSS | 95.6 | 3.9% | 0.49% | ▼ | 96% | 3.5 |
| 37 | MEDLEY | 90.5 | 2.4% | 0.46% | ▼ | 95% | 2.1 |
| 38 | FOURRTS | 89.3 | 8.9% | 0.45% | ▬ | 101% | 7.3 |
| 39 | HEGDE & HEGDE | 88.4 | 9.3% | 0.45% | ▬ | 101% | 7.5 |
| 40 | NUTRICIA | 87.6 | -0.2% | 0.44% | ▼ | 93% | -0.2 |

Corporate Monitor

#41 - 60

Among the companies ranked 41st to 60th, Meyer, Wallace, Pharmed, Allergan, Samarth, Akumentis, Reliance, and RPG achieved impressive double-digit growth.

Meyer showed significant progress in several therapeutic areas, particularly in Vitamins, Nutrients, and Minerals, with a strong performance in Calcium Products (Calcium+Cholecalciferol+Others), Vitamins, Pain Analgesics (through collagen and combinations), and Gastrointestinal therapy, benefiting from antifatulents like Dill Oil, Fennel Oil, and Simethicone.

Wallace maintained strong growth momentum in Gastrointestinal therapy, particularly with oral electrolytes and Antacids (Aluminium+Dimethicone+Magnesium), which continued to drive their success.

Pharmed also recorded a notable growth, especially in Vitamins, Minerals, and Nutrients (Calcium Products and Mineral Supplements like Cholecalciferol and Magnesium) and Pain Analgesics, largely driven by treatments for osteoarthritis and musculoskeletal products such as collagen and combinations.

Allergan demonstrated robust performance in ophthalmology, primarily through dry eye treatments (Carboxy methyl cellulose), Miotics, and Anti-glaucoma preparations (Timolol+Brimonidine).

Samarth posted growth driven by its Cardiac therapy (Heparins), while Reliance saw good performance in blood-related products, particularly Albumin.

Akumentis gained momentum through its Gynaecological offerings (Natural Microionized progesterone) and Cardiac therapy, especially Lipid-lowering drugs like Rosuvastatin. RPG registered growth in Gastrointestinal therapy (Loperamide) and Pain Analgesics (Naproxen).

<= 94%

95- 105%

>= 106%

| Rank | SUPER GROUP | MTH Apr 25 | | | | | |
|------|----------------------|----------------|-------------|-------------|------------|-------------|---------------|
| | | VAL | % Gr | % MS | G/L %MS | EI | Incr Gain |
| | IPM | 19710.6 | 7.8% | 100% | | 100% | 1424.3 |
| 41 | MEYER | 78.2 | 21.4% | 0.40% | ▲ | 113% | 13.8 |
| 42 | WIN-MEDICARE | 77.3 | -0.4% | 0.39% | ▼ | 92% | -0.3 |
| 43 | ASTRAZENECA | 77.1 | -1.8% | 0.39% | ▼ | 91% | -1.4 |
| 44 | APEX | 70.1 | 4.7% | 0.36% | ▼ | 97% | 3.2 |
| 45 | WALLACE | 69.3 | 10.1% | 0.35% | ▬ | 102% | 6.3 |
| 46 | JANSSEN | 65.0 | -7.3% | 0.33% | ▼ | 86% | -5.1 |
| 47 | PHARMED | 64.7 | 20.8% | 0.33% | ▲ | 112% | 11.1 |
| 48 | RAPTAKOS | 61.3 | 1.1% | 0.31% | ▼ | 94% | 0.7 |
| 49 | NOVARTIS* | 61.1 | 0.7% | 0.31% | ▼ | 93% | 0.4 |
| 50 | BOEHRINGER INGELHEIM | 57.4 | -2.9% | 0.29% | ▼ | 90% | -1.7 |
| 51 | ALLERGAN | 55.8 | 17.3% | 0.28% | ▲ | 109% | 8.2 |
| 52 | SAMARTH | 54.2 | 12.9% | 0.27% | ▲ | 105% | 6.2 |
| 53 | MSD* | 53.6 | -5.6% | 0.27% | ▼ | 88% | -3.2 |
| 54 | WOCKHARDT | 49.6 | 8.9% | 0.25% | ▬ | 101% | 4.1 |
| 55 | VIATRIS | 49.4 | 0.3% | 0.25% | ▼ | 93% | 0.1 |
| 56 | AKUMENTIS | 49.2 | 10.6% | 0.25% | ▬ | 103% | 4.7 |
| 57 | KLM | 47.2 | 6.8% | 0.24% | ▬ | 99% | 3.0 |
| 58 | CENTAUR | 46.4 | 7.2% | 0.24% | ▬ | 99% | 3.1 |
| 59 | RELIANCE | 46.4 | 17.0% | 0.24% | ▲ | 109% | 6.7 |
| 60 | RPG | 46.4 | 10.4% | 0.24% | ▬ | 102% | 4.4 |

Corporate Monitor

#61 - 80

Among corporates ranked between 61 to 80 in IPM Roche, Gaiderma, Merck, Biological E, Pure & Cure Healthcare, Ozone, and Lloyd, achieved double-digit growth.

Roche's strong performance was driven by its specialty anti-neoplastics, notably monoclonal antibodies like Pertuzumab and Trastuzumab, alongside its diagnostic agents for glucose monitoring.

Gaiderma's double-digit growth was primarily fueled by its cosmo derma portfolio, specifically combinations of emollients and kojic acid.

Merck's growth was significantly propelled by its anti-hypertensive drugs, including combinations of Bisoprolol, Amlodipine, and Telmisartan.

For Biological E, the Vitamins, Multivitamins, and Minerals segment was the primary growth driver, achieving 100% growth, followed by its vaccines (bacterial and viral).

Pure & Cure Healthcare's double-digit growth was mainly attributed to its lipid-lowering portfolio, featuring combinations like Aspirin + Rosuvastatin + Clopidogrel and Atorvastatin + Clopidogrel.

Ozone experienced double-digit growth by focusing on its anti-diabetic product range, particularly Voglibose + Metformin + Glimepiride combinations.

Lloyd Healthcare also demonstrated double-digit growth, with a broad range of products contributing, focusing on therapy areas such as cardiac, anti-diabetic, and vitamins & minerals.

<= 94%

95- 105%

>= 106%

| Rank | SUPER GROUP | MTH Apr 25 | | | | | |
|------|-----------------------|----------------|-------------|-------------|---------|-------------|---------------|
| | | VAL | % Gr | % MS | G/L %MS | EI | Incr Gain |
| | IPM | 19710.6 | 7.8% | 100% | | 100% | 1424.3 |
| 61 | SERDIA | 42.7 | 1.5% | 0.22% | ▼ | 94% | 0.6 |
| 62 | ROCHE | 42.3 | 51.6% | 0.21% | ▲ | 141% | 14.4 |
| 63 | GALDERMA | 42.2 | 14.2% | 0.21% | ▲ | 106% | 5.2 |
| 64 | MERCK | 41.2 | 17.4% | 0.21% | ▲ | 109% | 6.1 |
| 65 | BIOLOGICAL E | 41.1 | 10.9% | 0.21% | ▬ | 103% | 4.0 |
| 66 | TROIKAA | 41.0 | -15.5% | 0.21% | ▼ | 78% | -7.5 |
| 67 | MANEESH* | 39.7 | 1.2% | 0.20% | ▼ | 94% | 0.5 |
| 68 | INTEGRACE HEALTH | 39.2 | 3.7% | 0.20% | ▬ | 96% | 1.4 |
| 69 | WALTER BUSHNELL | 39.1 | 7.3% | 0.20% | ▬ | 100% | 2.7 |
| 70 | SERUM INSTITUTE | 38.6 | 7.4% | 0.20% | ▬ | 100% | 2.7 |
| 71 | PURE AND CURE HEALTHC | 35.6 | 13.4% | 0.18% | ▬ | 105% | 4.2 |
| 72 | MSN | 35.2 | -13.2% | 0.18% | ▼ | 81% | -5.3 |
| 73 | JOHNSON & JOHNSON | 34.8 | 1.6% | 0.18% | ▼ | 94% | 0.5 |
| 74 | PIRAMAL | 31.6 | 3.2% | 0.16% | ▬ | 96% | 1.0 |
| 75 | UNISON | 31.5 | 8.0% | 0.16% | ▬ | 100% | 2.3 |
| 76 | OZONE | 31.2 | 24.7% | 0.16% | ▲ | 116% | 6.2 |
| 77 | LLOYD HC | 29.5 | 20.9% | 0.15% | ▲ | 112% | 5.1 |
| 78 | TABLETS INDIA | 29.5 | 3.2% | 0.15% | ▬ | 96% | 0.9 |
| 79 | ALBERT DAVID | 29.4 | 5.4% | 0.15% | ▬ | 98% | 1.5 |
| 80 | FRESENIUS | 28.8 | 5.7% | 0.15% | ▬ | 98% | 1.6 |

Corporate Monitor

#81 - 100

A double digit growth was registered by Overseas, Charak, Kepler, Entod, BMS, British Biologicals, HBC LSS, and Glowderma in the last set of 20 Corporates from the TOP 100 list

Overseas' growth was significantly supported by its Vitamins & Minerals portfolio, particularly calcium combinations, and its anti-anaemic portfolio featuring elemental iron range.

Charak gained momentum due to its Gynaecological portfolio (M2 Tone) and Gastrointestinal portfolio (Hepatic protectors - Livomyn), followed by its Respiratory portfolio (Kofol).

Kepler HC observed growth driven by its Vitamins & Minerals segment, specifically Moktel & Bifolate.

BMS demonstrated double-digit growth with a complete focus on its Anti-neoplastic therapy, primarily the monoclonal antibody Nivolumab.

British Biologicals, known for its Nutraceuticals, performed well in protein supplements (B-Protin, D-Protin), followed by its Vitamins & Minerals range (MMS & MMS GOLD).

Glowderma achieved double-digit growth by focusing on its Cosmo derma range (MOIZ range) and anti-infectives, both with and without corticosteroids (Kevon).

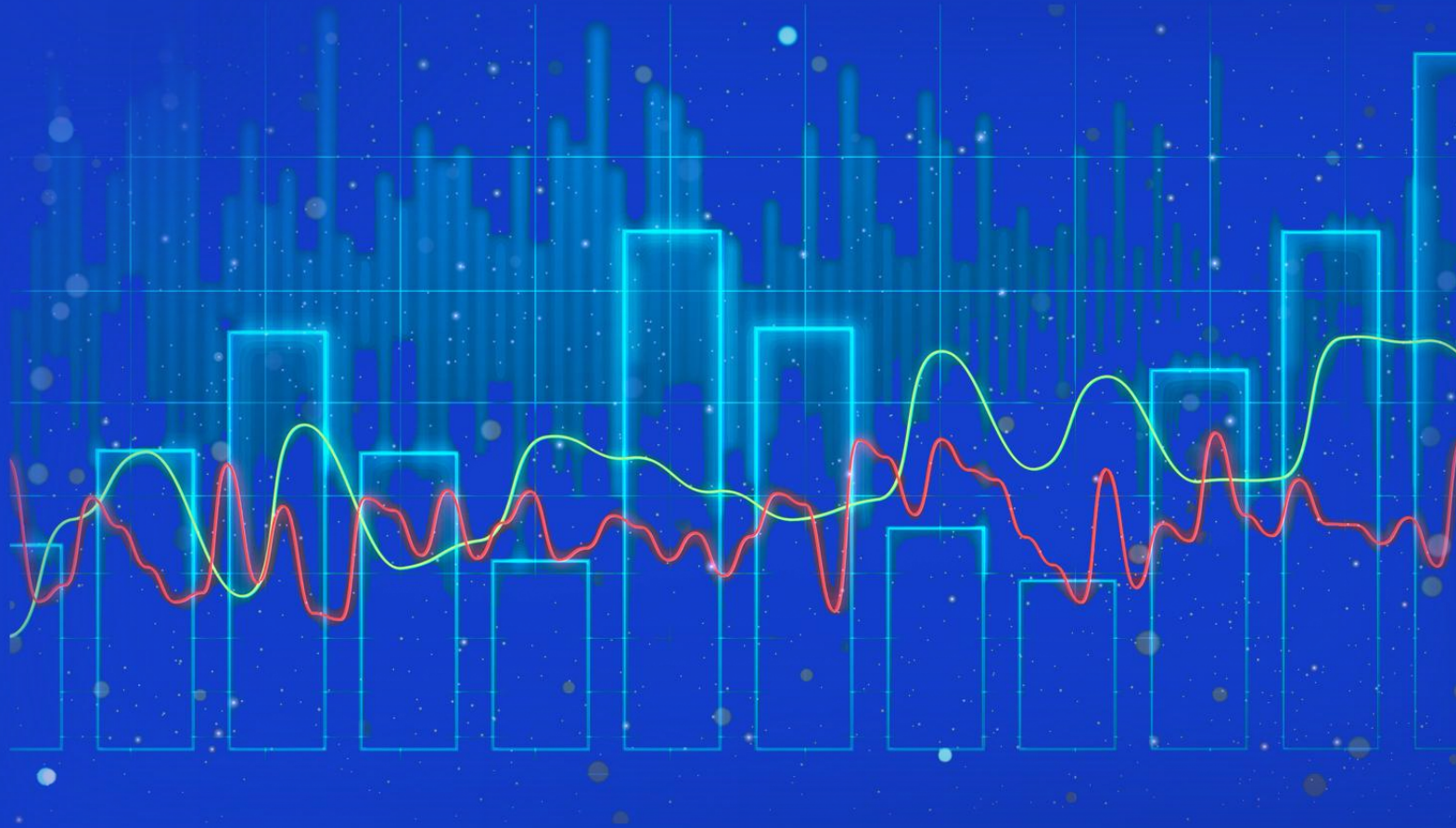
<= 94%

95- 105%

>= 106%

| Rank | SUPER GROUP | MTH Apr 25 | | | | | |
|------|--------------------|----------------|-------------|-------------|---------|-------------|---------------|
| | | VAL | % Gr | % MS | G/L %MS | EI | Incr Gain |
| | IPM | 19710.6 | 7.8% | 100% | | 100% | 1424.3 |
| 81 | NATCO | 28.3 | -5.0% | 0.14% | ▼ | 88% | -1.5 |
| 82 | LEEFORD HC | 28.0 | 4.1% | 0.14% | ▬ | 97% | 1.1 |
| 83 | EAST INDIA | 27.7 | 4.8% | 0.14% | ▬ | 97% | 1.3 |
| 84 | OVERSEAS | 27.2 | 13.2% | 0.14% | ▬ | 105% | 3.2 |
| 85 | CHARAK | 27.2 | 35.6% | 0.14% | ▲ | 126% | 7.1 |
| 86 | NEON | 26.5 | -16.4% | 0.13% | ▼ | 78% | -5.2 |
| 87 | KEPLER HC | 26.2 | 14.2% | 0.13% | ▬ | 106% | 3.3 |
| 88 | JAGSONPAL | 25.8 | -5.1% | 0.13% | ▼ | 88% | -1.4 |
| 89 | GUFIC BIOSCIENCE | 24.4 | 4.1% | 0.12% | ▬ | 97% | 1.0 |
| 90 | ENTOD | 23.8 | 35.0% | 0.12% | ▲ | 125% | 6.2 |
| 91 | BMS | 23.1 | 14.3% | 0.12% | ▬ | 106% | 2.9 |
| 92 | BRITISH BIOLOGICAL | 23.1 | 31.7% | 0.12% | ▲ | 122% | 5.5 |
| 93 | LINCOLN | 22.9 | -12.3% | 0.12% | ▼ | 81% | -3.2 |
| 94 | ICON LSS | 22.8 | 4.8% | 0.12% | ▬ | 97% | 1.0 |
| 95 | GALPHA | 22.1 | 6.3% | 0.11% | ▬ | 99% | 1.3 |
| 96 | MODI MUNDI | 22.0 | -6.2% | 0.11% | ▼ | 87% | -1.5 |
| 97 | HBC LSS | 21.8 | 10.7% | 0.11% | ▬ | 103% | 2.1 |
| 98 | LINUX LAB. | 21.6 | 4.6% | 0.11% | ▬ | 97% | 0.9 |
| 99 | UNS | 21.1 | 3.5% | 0.11% | ▬ | 96% | 0.7 |
| 100 | GLOWDERMA | 21.1 | 20.7% | 0.11% | ▲ | 112% | 3.6 |

Brand Monitor



Brand Monitor #1 – 20

| RANK | CORPORATE | COMPANY | BRAND | SG | SG GR% | MTH Apr 25 | | | | | |
|------|--------------|---------------------------------------|-------------|-------------------|--------|------------|-------|-------------|-----------------|---------------|-----------|
| | | | | | | VAL | % GR | % MS in IPM | G/L % MS in IPM | EI against SG | Incr Gain |
| | | | | | | 19710.6 | 7.8% | 100% | | | 1424.3 |
| 1 | USV | USV PVT LTD | GLYCOMET GP | ANTI DIABETIC | 6% | 74.5 | 4.8% | 0.38% | ▼ | 99% | 3.4 |
| 2 | HIMALAYA | HIMALAYA DRUG COMPANY | LIV.52 | GASTRO INTESTINAL | 7% | 72.3 | 13.8% | 0.37% | ▲ | 106% | 8.8 |
| 3 | GSK | GLAXOSMITHKLINE PHARMACEUTICALS LTD. | AUGMENTIN | ANTI-INFECTIVES | 6% | 66.3 | 7.5% | 0.34% | ▬ | 102% | 4.6 |
| 4 | CIPLA | CIPLA LTD. | FORACORT | RESPIRATORY | 8% | 64.3 | 13.5% | 0.33% | ▲ | 105% | 7.7 |
| 5 | ALKEM* | ALKEM LABORATORIES LTD. | PAN | GASTRO INTESTINAL | 7% | 62.9 | -0.6% | 0.32% | ▼ | 93% | -0.4 |
| 6 | FDC | FDC LTD. | ELECTRAL | GASTRO INTESTINAL | 7% | 61.8 | 4.9% | 0.31% | ▬ | 98% | 2.9 |
| 7 | ALKEM* | ALKEM LABORATORIES LTD. | PAN D | GASTRO INTESTINAL | 7% | 59.8 | 25.3% | 0.30% | ▲ | 117% | 12.1 |
| 8 | ALKEM* | ALKEM LABORATORIES LTD. | CLAVAM | ANTI-INFECTIVES | 6% | 55.8 | 10.2% | 0.28% | ▬ | 104% | 5.2 |
| 9 | ABBOTT* | ABBOTT INDIA LTD. | UDILIV | GASTRO INTESTINAL | 7% | 55.5 | 10.0% | 0.28% | ▬ | 103% | 5.0 |
| 10 | IPCA | IPCA LABORATORIES PVT LTD. | ZERODOL SP | PAIN / ANALGESICS | 7% | 55.3 | 5.0% | 0.28% | ▬ | 98% | 2.6 |
| 11 | ABBOTT* | NOVO NORDISK INDIA PVT LTD | MIXTARD | ANTI DIABETIC | 6% | 55.0 | -9.9% | 0.28% | ▼ | 85% | -6.1 |
| 12 | ARISTO | ARISTO PHARMACEUTICALS PVT.LTD | MONOCEF | ANTI-INFECTIVES | 6% | 51.8 | -4.4% | 0.26% | ▼ | 90% | -2.4 |
| 13 | ABBOTT* | ABBOTT INDIA LTD. | THYRONORM | HORMONES | 11% | 51.1 | 16.8% | 0.26% | ▲ | 105% | 7.4 |
| 14 | GLENMARK | GLENMARK PHARMACEUTICALS LTD. | TELMA | CARDIAC | 11% | 49.0 | 27.9% | 0.25% | ▲ | 115% | 10.7 |
| 15 | WIN-MEDICARE | WIN-MEDICARE PVT. LTD. | BETADINE | DERMA | 7% | 45.8 | -2.1% | 0.23% | ▼ | 91% | -1.0 |
| 16 | JB CHEMICALS | JB CHEMICALS | CILACAR | CARDIAC | 11% | 45.6 | 23.4% | 0.23% | ▲ | 111% | 8.6 |
| 17 | ABBOTT* | NOVO NORDISK INDIA PVT LTD | RYZODEG | ANTI DIABETIC | 6% | 44.8 | 10.1% | 0.23% | ▬ | 104% | 4.1 |
| 18 | USV | USV PVT LTD | ECOSPRIN AV | CARDIAC | 11% | 43.3 | 15.9% | 0.22% | ▲ | 104% | 5.9 |
| 19 | JANSSEN | JANSSEN | ULTRACET | PAIN / ANALGESICS | 7% | 42.2 | -4.7% | 0.21% | ▼ | 89% | -2.1 |
| 20 | FRANCO | FRANCO INDIAN PHARMACEUTICALS PVT LTD | DEXORANGE | BLOOD RELATED | 13% | 41.5 | 1.6% | 0.21% | ▼ | 90% | 0.7 |

| | | |
|--------|----------|---------|
| <= 94% | 95- 105% | >= 106% |
|--------|----------|---------|

Brand Monitor #21 – 40

| RANK | CORPORATE | COMPANY | BRAND | SG | SG GR% | MTH Apr 25 | | | | | |
|------|--------------|--------------------------------------|-------------|---------------------------------|--------|------------|-------|-------------|-----------------|---------------|-----------|
| | | | | | | VAL | % GR | % MS in IPM | G/L % MS in IPM | EI against SG | Incr Gain |
| | | | | | | 19710.6 | 7.8% | 100% | | | 1424.3 |
| 21 | MANKIND* | MANKIND PHARMACEUTICALS LTD. | MANFORCE | SEX STIMULANTS / REJUVENATORS | 2% | 41.4 | -2.9% | 0.21% | ▼ | 95% | -1.2 |
| 22 | SUN* | SUN PHARMA LABORATORIES LTD. | LEVIPIL | NEURO / CNS | 9% | 39.8 | 4.7% | 0.20% | ▬ | 96% | 1.8 |
| 23 | CIPLA | CIPLA LTD. | DUOLIN | RESPIRATORY | 8% | 37.7 | -0.6% | 0.19% | ▼ | 92% | -0.2 |
| 24 | SUN* | RANBAXY LABORATORIES LTD | ROSUVAS | CARDIAC | 11% | 36.6 | -5.3% | 0.19% | ▼ | 85% | -2.0 |
| 25 | ARISTO | ARISTO PHARMACEUTICALS PVT.LTD | PANTOP | GASTRO INTESTINAL | 7% | 36.4 | 3.4% | 0.18% | ▬ | 96% | 1.2 |
| 26 | SANOFI INDIA | SANOFI INDIA LTD. | LANTUS | ANTI DIABETIC | 6% | 35.0 | -1.8% | 0.18% | ▼ | 93% | -0.6 |
| 27 | GSK | GLAXOSMITHKLINE PHARMACEUTICALS LTD. | CALPOL | PAIN / ANALGESICS | 7% | 34.8 | 3.8% | 0.18% | ▬ | 97% | 1.3 |
| 28 | IPCA | IPCA LABORATORIES PVT LTD. | ZERODOL P | PAIN / ANALGESICS | 7% | 34.1 | 10.2% | 0.17% | ▬ | 103% | 3.2 |
| 29 | ABBOTT* | NOVO NORDISK INDIA PVT LTD | RYBELSUS | ANTI DIABETIC | 6% | 33.9 | 30.8% | 0.17% | ▲ | 124% | 8.0 |
| 30 | ABBOTT* | ABBOTT INDIA LTD. | VERTIN | NEURO / CNS | 9% | 32.7 | 14.3% | 0.17% | ▬ | 105% | 4.1 |
| 31 | PFIZER* | PFIZER LTD | BECOSULES | VITAMINS / MINERALS / NUTRIENTS | 6% | 32.1 | 10.5% | 0.16% | ▬ | 104% | 3.0 |
| 32 | ASTRAZENECA | ASTRAZENECA PHARMA INDIA LTD | BRILINTA | CARDIAC | 11% | 31.9 | 12.1% | 0.16% | ▬ | 101% | 3.5 |
| 33 | LUPIN | LUPIN LTD | GLUCONORM-G | ANTI DIABETIC | 6% | 31.5 | 10.4% | 0.16% | ▬ | 105% | 3.0 |
| 34 | GSK | GLAXOSMITHKLINE PHARMACEUTICALS LTD. | BETNOVATE N | DERMA | 7% | 31.3 | 25.9% | 0.16% | ▲ | 117% | 6.4 |
| 35 | ARISTO | ARISTO PHARMACEUTICALS PVT.LTD | MIKACIN | ANTI-INFECTIVES | 6% | 31.2 | 2.7% | 0.16% | ▬ | 97% | 0.8 |
| 36 | GSK | GLAXOSMITHKLINE PHARMACEUTICALS LTD. | T BACT | DERMA | 7% | 31.1 | 14.6% | 0.16% | ▬ | 107% | 4.0 |
| 37 | SUN* | SUN PHARMA LABORATORIES LTD. | SUSTEN | GYNAECOLOGICAL | 2% | 30.6 | 12.6% | 0.16% | ▬ | 111% | 3.4 |
| 38 | GSK | GLAXOSMITHKLINE PHARMACEUTICALS LTD. | BETNOVATE C | DERMA | 7% | 30.4 | 23.7% | 0.15% | ▲ | 115% | 5.8 |
| 39 | INTAS | INTAS PHARMACEUTICALS LTD | LEVERA | NEURO / CNS | 9% | 30.3 | 12.7% | 0.15% | ▬ | 104% | 3.4 |
| 40 | CIPLA | CIPLA LTD. | BUDECORT | RESPIRATORY | 8% | 30.2 | 0.3% | 0.15% | ▼ | 93% | 0.1 |

| | | |
|--------|----------|---------|
| <= 94% | 95- 105% | >= 106% |
|--------|----------|---------|

Brand Monitor #41 – 60

| RANK | CORPORATE | COMPANY | BRAND | SG | SG GR% | MTH Apr 25 | | | | | |
|------|--------------|--------------------------------|----------------|---------------------------------|--------|------------|--------|-------------|-----------------|---------------|-----------|
| | | | | | | VAL | % GR | % MS in IPM | G/L % MS in IPM | EI against SG | Incr Gain |
| | | | | | | 19710.6 | 7.8% | 100% | | | 1424.3 |
| 41 | APEX | APEX LABORATORIES LTD. | ZINCOVIT | VITAMINS / MINERALS / NUTRIENTS | 6% | 30.1 | -0.2% | 0.15% | ▼ | 94% | -0.1 |
| 42 | SUN* | SUN PHARMA LABORATORIES LTD. | GEMER | ANTI DIABETIC | 6% | 29.9 | 4.7% | 0.15% | ▬ | 99% | 1.3 |
| 43 | CADILA | CADILA PHARMACEUTICALS LTD | ACILOC | GASTRO INTESTINAL | 7% | 29.7 | -19.6% | 0.15% | ▼ | 75% | -7.2 |
| 44 | GALDERMA | GALDERMA INDIA PVT. LTD | CETAPHIL | DERMA | 7% | 29.7 | 9.9% | 0.15% | ▬ | 102% | 2.7 |
| 45 | GLENMARK | GLENMARK PHARMACEUTICALS LTD. | TELMA AM | CARDIAC | 11% | 29.6 | 14.3% | 0.15% | ▬ | 103% | 3.7 |
| 46 | JB CHEMICALS | JB CHEMICALS | RANTAC | GASTRO INTESTINAL | 7% | 29.1 | -9.4% | 0.15% | ▼ | 84% | -3.0 |
| 47 | TORRENT | TORRENT PHARMACEUTICALS LTD. | CHYMORAL FORTE | PAIN / ANALGESICS | 7% | 28.2 | 11.4% | 0.14% | ▬ | 104% | 2.9 |
| 48 | MANKIND* | MANKIND PHARMACEUTICALS LTD. | PREGA NEWS | OTHERS | 17% | 28.2 | 30.3% | 0.14% | ▲ | 111% | 6.6 |
| 49 | INTAS | INTAS PHARMACEUTICALS LTD | GABAPIN NT | NEURO / CNS | 9% | 28.2 | 14.9% | 0.14% | ▬ | 106% | 3.7 |
| 50 | P&G | PROCTER & GAMBLE HEALTH LTD | EVION | VITAMINS / MINERALS / NUTRIENTS | 6% | 27.6 | 17.7% | 0.14% | ▲ | 111% | 4.2 |
| 51 | SUN* | SUN PHARMA LABORATORIES LTD. | PANTOCID | GASTRO INTESTINAL | 7% | 27.4 | 5.3% | 0.14% | ▬ | 98% | 1.4 |
| 52 | TORRENT | TORRENT PHARMACEUTICALS LTD. | SHELCAL | VITAMINS / MINERALS / NUTRIENTS | 6% | 27.4 | -8.3% | 0.14% | ▼ | 86% | -2.5 |
| 53 | ALKEM* | ALKEM LABORATORIES LTD. | A TO Z NS | VITAMINS / MINERALS / NUTRIENTS | 6% | 27.3 | 17.3% | 0.14% | ▲ | 110% | 4.0 |
| 54 | EMCURE* | EMCURE PHARMACEUTICALS LTD | OROFER-XT | BLOOD RELATED | 13% | 27.2 | -9.0% | 0.14% | ▼ | 81% | -2.7 |
| 55 | ABBOTT* | ABBOTT INDIA LTD. | DUPHALAC | GASTRO INTESTINAL | 7% | 27.2 | 8.5% | 0.14% | ▬ | 101% | 2.1 |
| 56 | MICRO | MICRO LABS LTD | DOLO | PAIN / ANALGESICS | 7% | 27.1 | -12.3% | 0.14% | ▼ | 82% | -3.8 |
| 57 | GLENMARK | GLENMARK PHARMACEUTICALS LTD. | TELMA H | CARDIAC | 11% | 26.5 | -1.0% | 0.13% | ▼ | 89% | -0.3 |
| 58 | ALEMBIC | ALEMBIC LTD | AZITHRAL | ANTI-INFECTIVES | 6% | 26.4 | -11.9% | 0.13% | ▼ | 83% | -3.6 |
| 59 | NUTRICIA | NUTRICIA INTERNATIONAL PVT.LTD | DEXOLAC 1 | VITAMINS / MINERALS / NUTRIENTS | 6% | 26.4 | 7.0% | 0.13% | ▬ | 101% | 1.7 |
| 60 | ABBOTT* | ABBOTT INDIA LTD. | DUPHASTON | GYNAECOLOGICAL | 2% | 26.0 | 3.3% | 0.13% | ▬ | 102% | 0.8 |

<= 94%

95- 105%

>= 106%

Brand Monitor #61 – 80

| RANK | CORPORATE | COMPANY | BRAND | SG | SG GR% | MTH Apr 25 | | | | | |
|------|--------------|--------------------------------------|-----------------|---------------------------------|--------|------------|--------|-------------|-----------------|---------------|-----------|
| | | | | | | VAL | % GR | % MS in IPM | G/L % MS in IPM | EI against SG | Incr Gain |
| | | | | | | 19710.6 | 7.8% | 100% | | | 1424.3 |
| 61 | EMCURE* | ZUVENTUS HEALTHCARE LTD | ZOSTUM | ANTI-INFECTIVES | 6% | 25.8 | 14.5% | 0.13% | — | 108% | 3.3 |
| 62 | INTAS | INTAS PHARMACEUTICALS LTD | ZORYL-M | ANTI DIABETIC | 6% | 25.8 | 6.6% | 0.13% | — | 101% | 1.6 |
| 63 | SUN* | RANBAXY LABORATORIES LTD | VOLINI | PAIN / ANALGESICS | 7% | 25.6 | 5.3% | 0.13% | — | 98% | 1.3 |
| 64 | MANKIND* | MANKIND PHARMACEUTICALS LTD. | MOXIKIND CV | ANTI-INFECTIVES | 6% | 25.6 | -5.2% | 0.13% | ▼ | 90% | -1.4 |
| 65 | MSD* | MSD PHARMACEUTICALS PRIVATE LTD. | JANUMET | ANTI DIABETIC | 6% | 25.5 | -6.3% | 0.13% | ▼ | 89% | -1.7 |
| 66 | ALKEM* | ALKEM LABORATORIES LTD. | TAXIM O | ANTI-INFECTIVES | 6% | 25.2 | 2.6% | 0.13% | — | 97% | 0.6 |
| 67 | ABBOTT* | ABBOTT HEALTHCARE PVT. LTD | STEMETIL | GASTRO INTESTINAL | 7% | 25.2 | 3.7% | 0.13% | — | 97% | 0.9 |
| 68 | MANKIND* | MANKIND PHARMACEUTICALS LTD. | UNWANTED KIT | GYNAECOLOGICAL | 2% | 25.1 | -0.6% | 0.13% | ▼ | 98% | -0.1 |
| 69 | MANKIND* | MANKIND PHARMACEUTICALS LTD. | AMLOKIND-AT | CARDIAC | 11% | 24.9 | 10.0% | 0.13% | — | 99% | 2.3 |
| 70 | SUN* | SUN PHARMA LABORATORIES LTD. | SOMPRAZ D | GASTRO INTESTINAL | 7% | 24.8 | 18.9% | 0.13% | ▲ | 111% | 4.0 |
| 71 | CIPLA | CIPLA LTD. | DYTOR | CARDIAC | 11% | 24.7 | 12.0% | 0.13% | — | 101% | 2.6 |
| 72 | ABBOTT* | NOVO NORDISK INDIA PVT LTD | NOVOMIX | ANTI DIABETIC | 6% | 24.6 | -22.4% | 0.12% | ▼ | 74% | -7.1 |
| 73 | CIPLA | CIPLA LTD. | SEROFLO | RESPIRATORY | 8% | 24.5 | 5.6% | 0.12% | — | 98% | 1.3 |
| 74 | FDC | FDC LTD. | ENERZAL | GASTRO INTESTINAL | 7% | 24.2 | 0.2% | 0.12% | — | 93% | 0.1 |
| 75 | USV | USV PVT LTD | ECOSPRIN GOLD | CARDIAC | 11% | 24.2 | 11.4% | 0.12% | — | 100% | 2.5 |
| 76 | P&G | PROCTER & GAMBLE HEALTH LTD | NEUROBION FORTE | VITAMINS / MINERALS / NUTRIENTS | 6% | 24.2 | 18.7% | 0.12% | ▲ | 112% | 3.8 |
| 77 | SUN* | SUN PHARMA LABORATORIES LTD. | PANTOCID DSR | GASTRO INTESTINAL | 7% | 23.8 | 11.8% | 0.12% | — | 104% | 2.5 |
| 78 | SANOFI INDIA | SANOFI INDIA LTD. | ALLEGRA | RESPIRATORY | 8% | 23.6 | 17.9% | 0.12% | ▲ | 110% | 3.6 |
| 79 | GSK | GLAXOSMITHKLINE PHARMACEUTICALS LTD. | ELTROXIN | HORMONES | 11% | 23.2 | 6.1% | 0.12% | — | 96% | 1.3 |
| 80 | NUTRICIA | NUTRICIA INTERNATIONAL PVT.LTD | APTAMIL GOLD | VITAMINS / MINERALS / NUTRIENTS | 6% | 23.2 | -1.6% | 0.12% | ▼ | 93% | -0.4 |

<= 94%

95- 105%

>= 106%

Brand Monitor #81 – 100

| RANK | CORPORATE | COMPANY | BRAND | SG | SG GR% | MTH Apr 25 | | | | | |
|------|--------------|----------------------------------|---------------|-------------------|--------|------------|-------|-------------|-----------------|---------------|-----------|
| | | | | | | VAL | % GR | % MS in IPM | G/L % MS in IPM | EI against SG | Incr Gain |
| | | | | | | 19710.6 | 7.8% | 100% | | | 1424.3 |
| 81 | DR. REDDYS | DR. REDDYS LABORATORIES LTD | ECONORM | GASTRO INTESTINAL | 7% | 23.1 | 19.4% | 0.12% | ▲ | 111% | 3.7 |
| 82 | BMS | BMS INDIA PVT. LTD. | OPDYTA | ANTI-NEOPLASTICS | 12% | 23.1 | 14.3% | 0.12% | ▬ | 102% | 2.9 |
| 83 | RELIANCE | RELIANCE LIFE SCIENCE | ALBUREL | BLOOD RELATED | 13% | 22.5 | 33.0% | 0.11% | ▲ | 118% | 5.6 |
| 84 | TORRENT | TORRENT PHARMACEUTICALS LTD. | NIKORAN | CARDIAC | 11% | 22.5 | 32.0% | 0.11% | ▲ | 119% | 5.5 |
| 85 | CIPLA | CIPLA LTD. | MONTAIR LC | RESPIRATORY | 8% | 22.3 | 18.8% | 0.11% | ▲ | 110% | 3.5 |
| 86 | ARISTO | ARISTO PHARMACEUTICALS PVT.LTD | MERO | ANTI-INFECTIVES | 6% | 22.2 | 12.8% | 0.11% | ▬ | 107% | 2.5 |
| 87 | PFIZER* | PFIZER LTD | COREX DX | RESPIRATORY | 8% | 22.0 | 22.2% | 0.11% | ▲ | 114% | 4.0 |
| 88 | TORRENT | TORRENT PHARMACEUTICALS LTD. | NEXPRO RD | GASTRO INTESTINAL | 7% | 21.9 | 21.3% | 0.11% | ▲ | 113% | 3.8 |
| 89 | ALKEM* | ALKEM LABORATORIES LTD. | PIPZO | ANTI-INFECTIVES | 6% | 21.8 | 31.4% | 0.11% | ▲ | 124% | 5.2 |
| 90 | ARISTO | ARISTO PHARMACEUTICALS PVT.LTD | MONOCEF SB | ANTI-INFECTIVES | 6% | 21.8 | 4.6% | 0.11% | ▬ | 99% | 1.0 |
| 91 | SYSTOPIC | SYSTOPIC LABORATORIES LTD-MEM | CYRA D | GASTRO INTESTINAL | 7% | 21.6 | 5.0% | 0.11% | ▬ | 98% | 1.0 |
| 92 | ZYDUS* | ZYDUS CADILA - ZHL | LIPAGLYN | CARDIAC | 11% | 21.6 | 37.4% | 0.11% | ▲ | 124% | 5.9 |
| 93 | BLUE CROSS | BLUE CROSS LABORATORIES LTD | MEFTAL SPAS | GASTRO INTESTINAL | 7% | 21.5 | 1.5% | 0.11% | ▬ | 95% | 0.3 |
| 94 | FDC | FDC LTD. | ZIFI | ANTI-INFECTIVES | 6% | 21.4 | -7.2% | 0.11% | ▼ | 88% | -1.7 |
| 95 | JB CHEMICALS | JB CHEMICALS | CILACAR T | CARDIAC | 11% | 21.2 | 24.0% | 0.11% | ▲ | 112% | 4.1 |
| 96 | USV | USV PVT LTD | GLYCOMET TRIO | ANTI DIABETIC | 6% | 21.1 | -4.1% | 0.11% | ▼ | 91% | -0.9 |
| 97 | ABBOTT* | ABBOTT HEALTHCARE PVT. LTD | KENACORT | DERMA | 7% | 21.1 | 9.2% | 0.11% | ▬ | 102% | 1.8 |
| 98 | MACLEODS | MACLEODS PHARMACEUTICALS PVT.LTD | MEROMAC | ANTI-INFECTIVES | 6% | 21.0 | 7.8% | 0.11% | ▬ | 102% | 1.5 |
| 99 | ARISTO | ARISTO PHARMACEUTICALS PVT.LTD | MONTAZ | ANTI-INFECTIVES | 6% | 20.9 | 11.4% | 0.11% | ▬ | 105% | 2.1 |
| 100 | SUN* | SUN PHARMA LABORATORIES LTD. | RIFAGUT | GASTRO INTESTINAL | 7% | 20.6 | 17.0% | 0.10% | ▬ | 109% | 3.0 |

| | | |
|--------|----------|---------|
| <= 94% | 95- 105% | >= 106% |
|--------|----------|---------|

Stars of the month



Incremental Gain

- Pan D
- Telma
- Liv 52
- Cilacar
- Rybelsus



% MS Gain

- Pan D
- Rybelsus
- Cilacar
- Telma



Highest EI

- Pipzo
- Lipaglyn
- Rybelsus
- Alburel
- Nicoran

Thank you

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