

PARTNER SUCCESS OFFICE 2026-27



PSO Team FY 2026-27



Licensing update - YTD 2025-26

Head	Apr'25	May'25	Jun'25	Jul'25	Aug'25	Sep'25	Oct'25	Nov'25	Dec'25	Dec'25	Feb'26	Total as on Feb'26	YTD (Apr'25-Jan'26)	Jan'26 Volume	MTD Growth %	FLS Count	Jan'26 Productivity	Feb'26 Productivity
Vivek Srivastav	1205	1621	1321	1321	1450	1525	1203	1559	1872	1824	1780	16918	15138	1924	↓ -7%	1505	1.28	1.18
Bipin Mundada	81	66	76	76	88	118	109	121	128	128	145	1139	994	128	↑ 13%	138	0.93	1.05
Sarat Yadav	310	335	364	290	256	324	238	343	420	381	455	3716	3261	381	↑ 19%	732	0.52	0.62
Nps Shekhawat	133	151	162	168	112	139	88	108	117	108	97	1383	1286	108	↓ -10%	173	0.62	0.56
Anurag Choudhary	12	15	17	16	12	10	6	3	5	10	6	112	106	10	↓ -40%	96	0.10	0.06
Grand Total	12	15	17	16	12	10	6	3	5	5	6	112	106	10	↓ -40%	96	0.10	0.06
Grand Total	1741	2198	2010	1931	1918	2116	1644	2134	2542	2551	2483	23268	20785	2551	-3%	2644	0.66	0.94



***23,268**
Total YTD Licensing

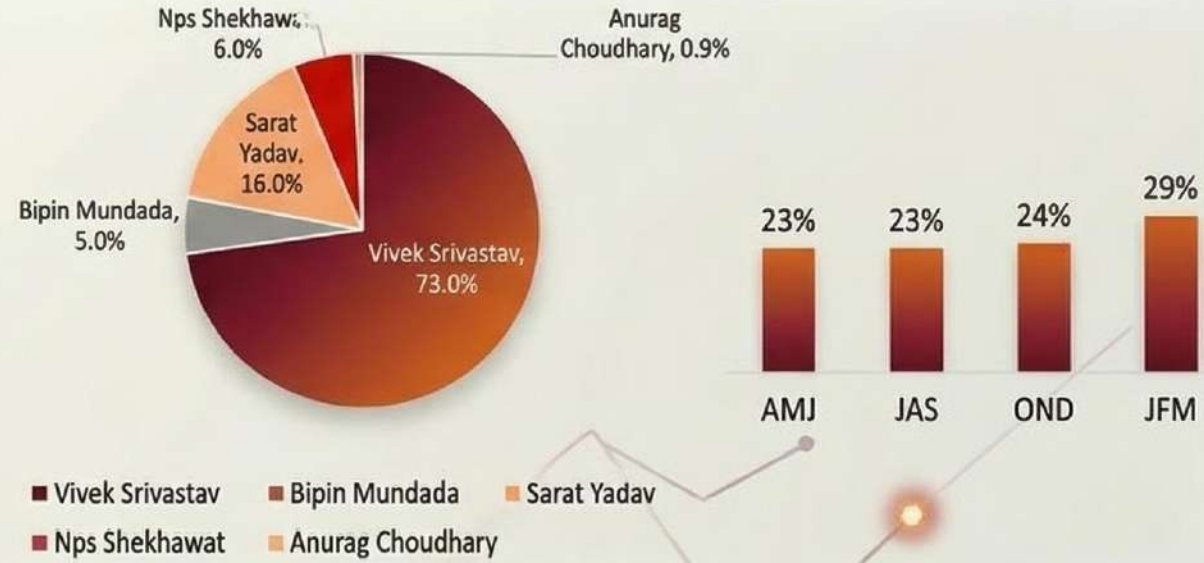
COUNT OF LICENSES

Head	AMJ	JAS	OND	JFM	Total
Vivek Srivastav	4217	4363	4634	5628	18842
Bipin Mundada	223	285	358	401	1267
Sarat Yadav	1009	870	1001	1217	4097
Nps Shekhawat	456	409	313	419	1491
Anurag Choudhary	44	38	14	14	122
Grand Total	5949	5965	6320	7585	25819

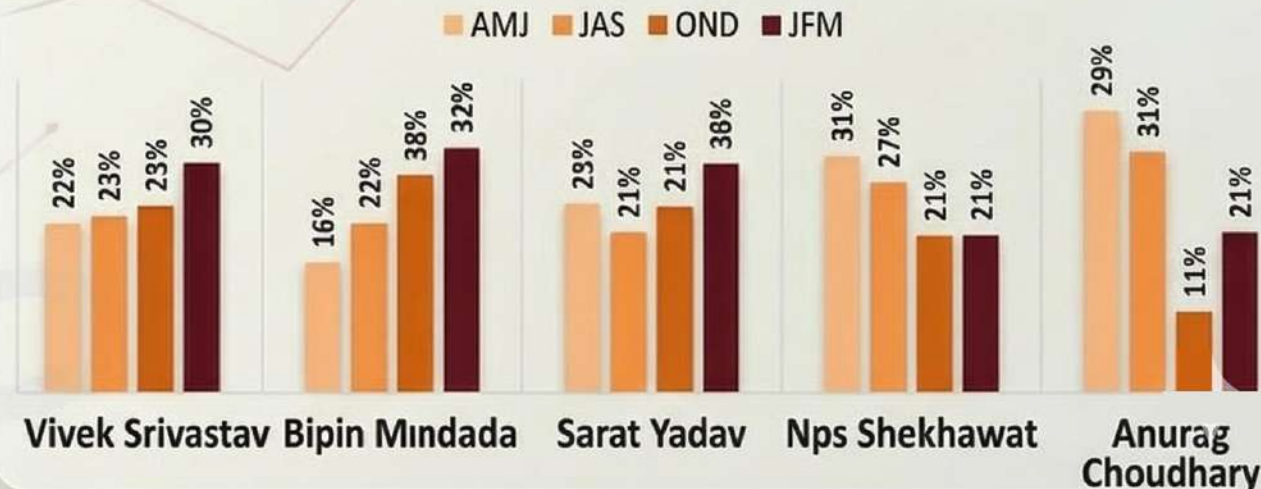
SHARE OF LICENSES

Head	AMJ	JAS	OND	JFM	Share
Vivek Srivastav	22%	23%	25%	30%	73%
Bipin Mundada	18%	28%	28%	32%	5%
Sarat Yadav	25%	27%	24%	30%	16%
Nps Shekhawat	31%	27%	21%	21%	6%
Anurag Choudhary	36%	31%	11%	21%	0.5%
Grand Total	23%	23%	24%	29%	100%

OVERVIEW & TRENDS



LICENSING TREND - BU WISE



*March numbers considered equal to Jan'26 license



Profiler Insight



Profiler Analysis

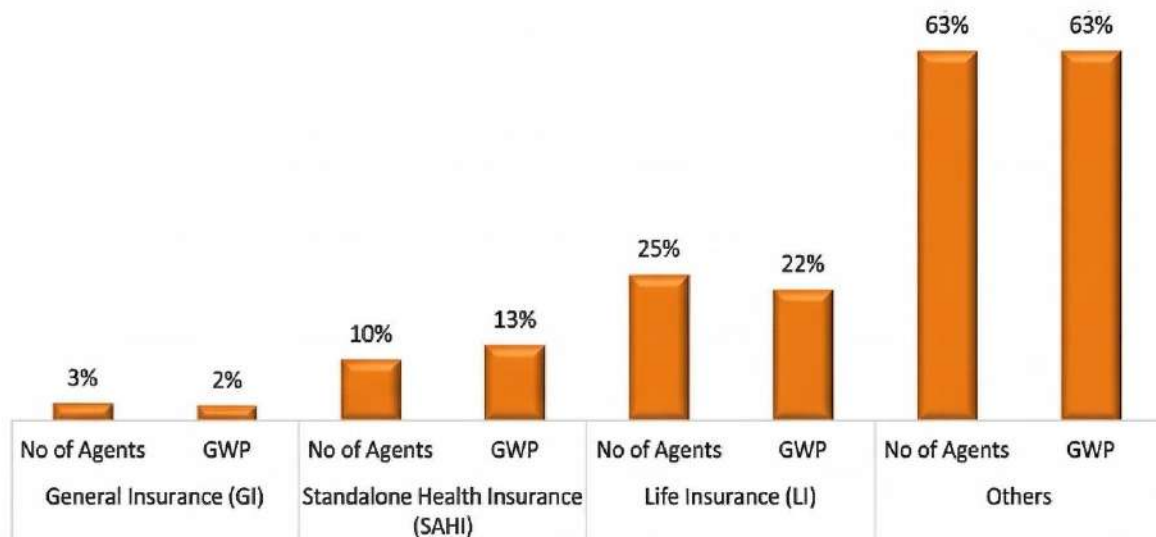
Heads	General Insurance (GI)		Standalone Health Insurance (SAHI)		Life Insurance (LI)		Others		Total	
	No of Agents	GWP	No of Agents	GWP	No of Agents	GWP	No of Agents	GWP	No of Agents	Overall Total
Anurag Choudhary	0	0	0	0	0	0	5	135195	5	135195
Bipin Mundada	139	4337915	6	17176	21	34005016.1	230	4478203.37	396	12238311
NPS SHEKHAWAT	234	14942307	7	78400	15	483598	173	9618129.97	429	25122444
SARAT YADAV	606	22270665	19	442478	59	522471	759	12746470.05	1443	36282105
Vivek Srivastav	163	2213293	647	11636743	1651	20551410	3996	57930568.49	8367	92332015
Grand Total	1142	44064200	679	12174797	1656	24962 495	5163	84908567.71	8640	16610000

EFFICIENCY & PRODUCTIVITY METRICS

Heads	GI		SAHI		LI		Others		Productivity			
	% Agents	% GWP	% Agents	% GWP	% Agents	% GWP	% Agents	% GWP	GI	SAHI	LI	Others
Anurag Choudhary	NA	NA	NA	NA	NA	NA	100%	100%	NA	NA	NA	27039
Bipin Mundada	35%	35%	2%	0%	5%	28%	58%	37%	31208	2863	162144	19470
NPS SHEKHAWAT	55%	59%	2%	0%	3%	2%	40%	38%	63856	11200	32240	55596
SARAT YADAV	42%	62%	1%	1%	4%	1%	53%	33%	37245	23288	8855	16794
Vivek Srivastav	3%	2%	10%	13%	25%	22%	63%	63%	13378	13986	13166	14467
Grand Total	13%	27%	8%	7%	19%	15%	60%	51%	33855	17930	15074	16446

Profiler Analysis - Health & Emerging - % wise

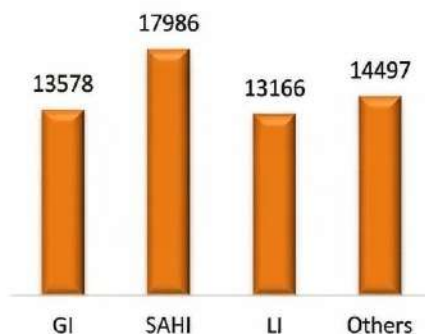
Vivek Srivastav



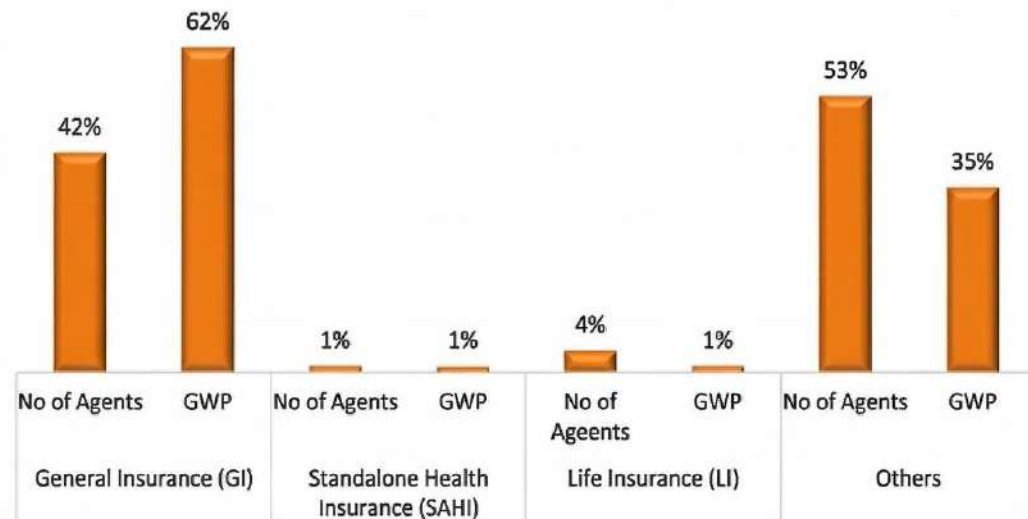
Other Agent - 63% contribution in recruitment and GWP from new agents



Productivity of SAHI agent better than LI



SARAT YADAV



GI Agent - 42% agent from GI and 62% new agent business mix from GI agents



Life and SAHI marginal contribution in GWP



GI productivity is also highest amongst all cohort

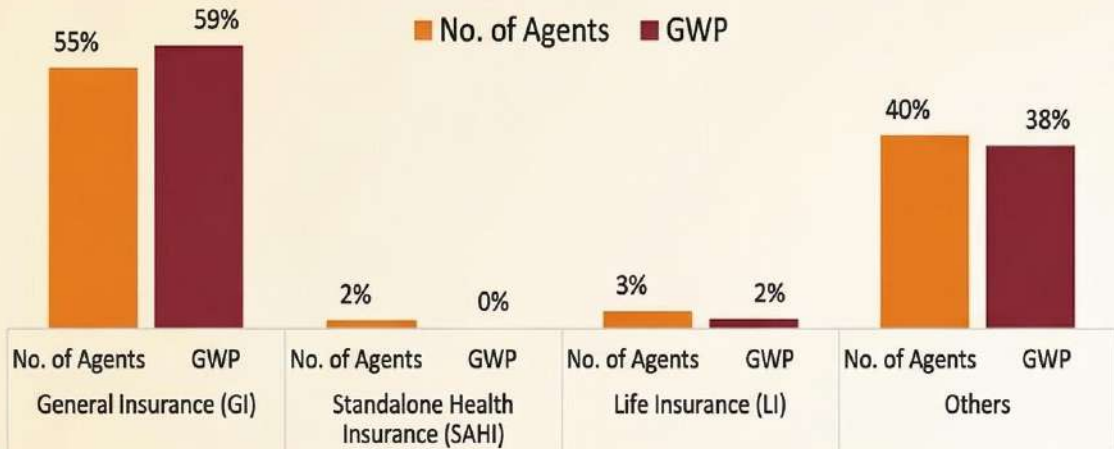


25 Years
ONEIL
Team

CELEBRATING
A LEGACY OF TRUST

Profiler Analysis – Motor and MM - % wise

Profile: NPS SHEKHAWAT



➤ GI & Other agents are dominating in recruitment and GWP



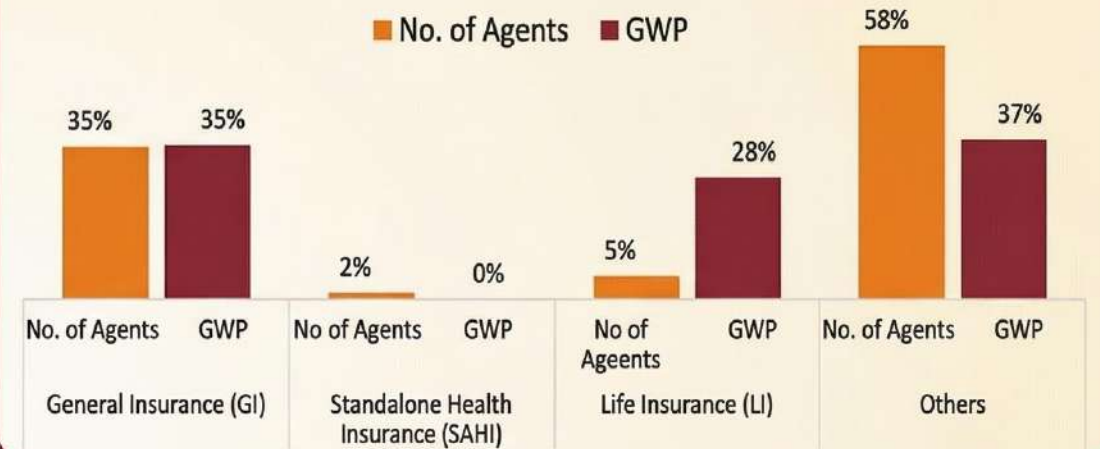
➤ In productivity also GI & Others have edge over LI and SAHI



Shekhawat Productivity (Valuation)



Profile: Bipin Mundada



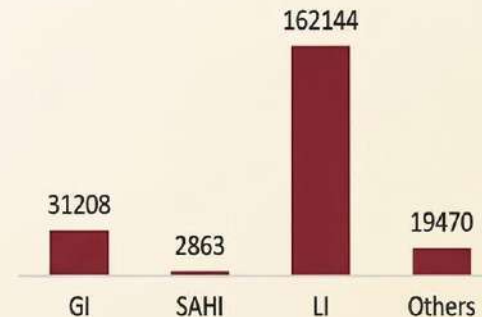
➤ In recruitment contribution others are **58%** and GI - **35%**



➤ Productivity GI is better than others, LI has **1.62 Lakh** but agent recruitment contribution is only 5%



Mundada Productivity (Valuation)



25 Years
ONEIL
Team

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Licensing Plan - 2026-27

Head	Licensing Strategy	PSO Drive	AMJ
Vivek Srivastav	<ul style="list-style-type: none"> • 25 K for FY 2026-27 • Per FLS 2 MOM for HA / Per FLS 4 MOM for PBL 	<ul style="list-style-type: none"> • Avg. 1500 FLS * 2 Licensing MOM = 3K • Race to Licensing for AMJ • as per trend – 22% Q1- Tgt 	5595
Bipin Mundada	1.5k for FY 2026-27	<ul style="list-style-type: none"> • Avg. FLS 130 * 1 Licensing MOM Per FLS 1 MOM as per trend – 18% Q 1- Tgt 	264
Sarat Yadav	5K for FY 2026-27	<ul style="list-style-type: none"> • 500 licensing MOM FLS-732 as per trend – 25% Q 1- Tgt 	1231
Nps Shekhawat	1.5k for FY 2026-27	<ul style="list-style-type: none"> • Drive 300 IRDA license per month as per trend – 31% Q 1- Tgt 	459
Anurag Choudhary	1k For FY 2026-27	Segment wise recruitment Cluster approach for recruitment as per trend – 36% Q 1- Tgt	361
Total AMJ:			7910

Recruitment Flow Chart

Zone Wise Adherence

KPI Linkage

Governance at PSO CH Level



Recruitment Flow Chart- AI Led recruitment tools, Prospecting to Licensing Journey.
 Zone Wise Adherence- Robust strong governance mechanism with weekly reviews at all levels
 KPI Linkage- KPI Linkage between sales and PSO CH KPI.



Overall Activation

OVERALL PERFORMANCE FY'25 - FY'26

FY'25: **16005**  FY'26: **17967**  Growth: 12%

PMG

FY'25: **8164**
FY'26: **9363**

Growth: 15%

EMG

FY'25: **7107**
FY'26: **7634**

Growth: 7%




PMG MM

FY'25: **734**
FY'26: **969**

Growth: 32%

FUTURE-FOCUSED TARGETING

Targeting growth of XXX % Overall

-  PMG- XX%
-  EMG- XX%
-  PMG MM- XX%

3 P Activation Drive



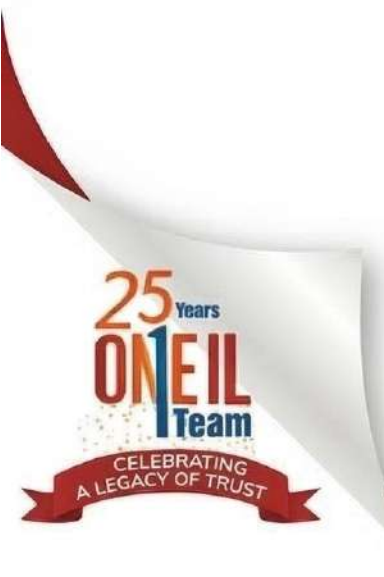
Key Support Initiatives | Monthly Status

Support Item	MOS

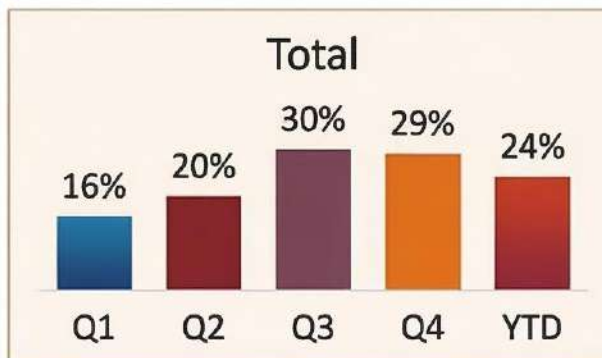
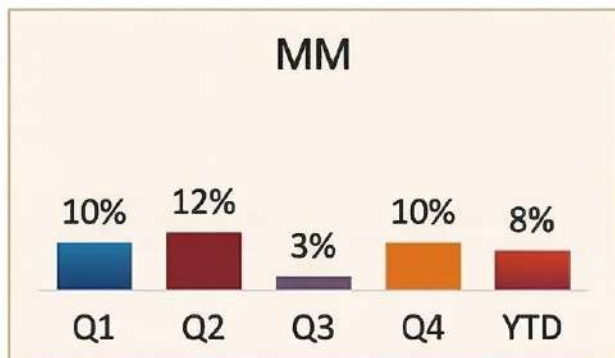
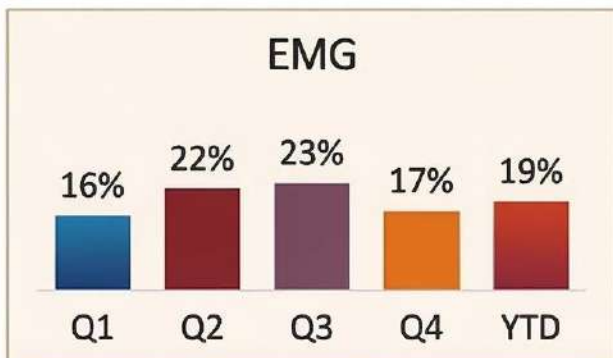
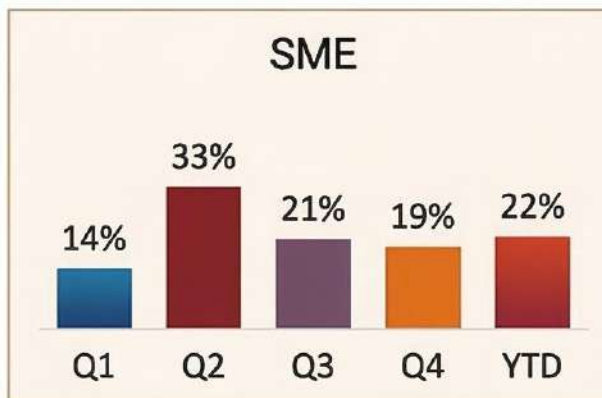
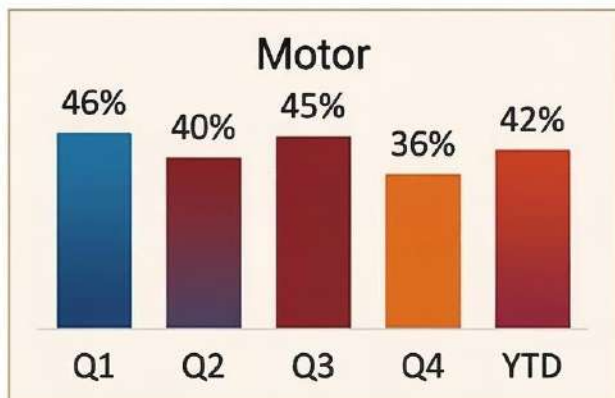
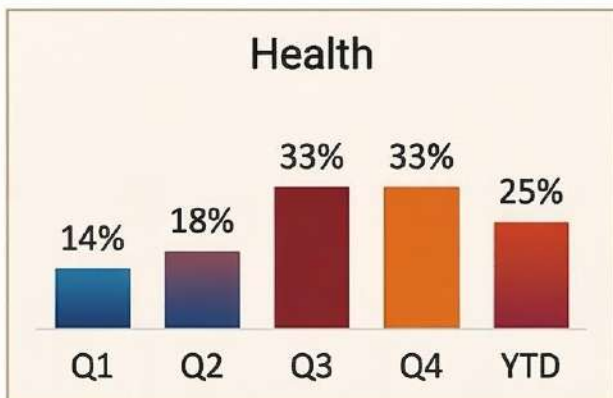
Support Item	MOS

Support Item	MOS

Support Item	MOS



Activation Update YTD M0-M1



Overall M1 Activation
24%

Lead Segment
Motor at 42%

Lowest Segment
MM at 8%

Q1 Highlights
Q1 Details: Health 14%, Motor 46%, SME 14%, EMG 16%, MM 10% and overall 16%

YTD Productivity

- 81 k overall
- Health- 55k
- Motor-1.43 Lakh
- SME- 7.46Lakh
- EMG 1.48Lakh
- MM-1.33

	Health	Motor	SME	EMG	MM	Total
Q1	60169	77124	762543	121087	87579	80171
Q2	70628	78309	869288	151853	103156	96743
Q3	52269	227464	265788	170331	163850	81838
Q4	50742	250014	732446	147480	174398	74047
YTD	55717	143320	746212	148559	133322	81582

Activation Plan for FY 2026-27

TARGET M1 ACTIVATION



Drive for **60% M1 Activation**

KEY LICENSING (Health/EMG)



Focus on Health & EMG- **90% Licensing** from both BU

CELEBRATE GRADUATION DAY



Drive of **Graduation day**

MAXIMIZE GROWTH POTENTIAL



Business **Growth Potential**

BUSINESS UNIT FOCUS & TARGETS



DETAILED PERFORMANCE METRICS (FY 2026-27)

	M1 Activation	License Activation	GWP	FY'26-Q1	Growth over Last year
Health	40%	2238	134557667	37665678	258%
Motor	50%	230	17699949	16118907	10%
SME	20%	72	55055637	6100348	803%
SME	40%	492	59623151	22279975	168%
EMG	40%	492	59623151	22279975	168%
MM	30%	79	6936218	2014306	244%
Total	39%	3111	273972761	84179214	225%

OVERALL RESULTS CARD



Engagement Initiative & Impact



Unified Branch Meet

Business Impact

Accelerate 3P activation & distribution alignment across branches



Motor Bandhan

Business Impact

Re-engage and reactivate inactive agents to improve productivity and contribution.



Bandhan Elite

Business Impact

Enhance top agent productivity, drive New age product adoption and deepen the penetration.



Health Branch Meet


Business Impact

Improve MOM activation while strengthening Summit qualification pipeline



Product Launches


Product Launches/ Product Refresher

Enable faster product adoption and incremental GWP growth 



Win-back


Activity/Cross Sell

Improve agent activation and unlock 2 P growth opportunities through targeted cross sell 



Summit Agents

Business Impact

Enable upwards club movement by enhancing engagement with high potential agents 

Training Calendar and Outcome

Prarambh



For M0-M1 Agents

- Content: 3P centric content, Sales process, Opportunity & Action planning
- Duration : 1 HOUR - Centrally in batches of 100- BU specific

Neev I



For M2 Agents

- Content: 4D concept, Health combo
- Duration : 1 HOUR - Centrally in batches of 100- BU specific

Neev II

For M3 Agents

- Content: Motor, SME and Travel
- Duration : 1 HOUR - Centrally in batches of 100- BU specific



Any Other Trainings

Any Other Trainings

- New Product launch/ Update
- Leader Induction and monthly leader trainings
- As per requirement- Motor, SME
- Any ad-hoc trainings





Scheduling Info

Prarambh, Neev 1 and Neev 2 will be scheduled before 15th of every month



Activation Goals

M0-M1 Activation – 50% 

M0-M3 Activation – 70% 

Training Schedule

AGENT

Pre-licensing (IRDA)

- BOP **Fortnightly**
- IRDA Refresher **Weekly**
- Reinforcing One IL opportunity **Fortnightly**

Post Licensing

- Prarambh **Monthly**
- Neev I & Neev II **Monthly**
- Saksham- Skilling Session **Monthly**
- Graduation Day **Weekly**
- Shiksha Abhiyaan **Monthly**
- Branch Meet **Monthly**

LEADER

Pre Coding

- Leader COP **Fortnightly**

Post Coding

- New Leader Induction (2 days) **Monthly**
- Leader Huddle **Weekly twice**
- Leader Skilling **Fortnightly**
- Leader Skilling - Udaan Leaders **Monthly**
- Leader Skilling - Vijaypath Leaders **Monthly**
- Leader Townhall **Monthly**
- Shiksha Abhiyaan **Weekly**
- Leader COP/ BOP TTT **Monthly**

FLS / BM

- Shiksha Abhiyaan **Weekly**
- Employee Pathshala **Weekly**
- Product & Sales Pitches **Fortnightly**

Thank You