



PERFORMANCE HIGHLIGHTS Q4FY22

 PAGE INDUSTRIES LIMITED

MAY 26, 2022

SAFE HARBOUR STATEMENT

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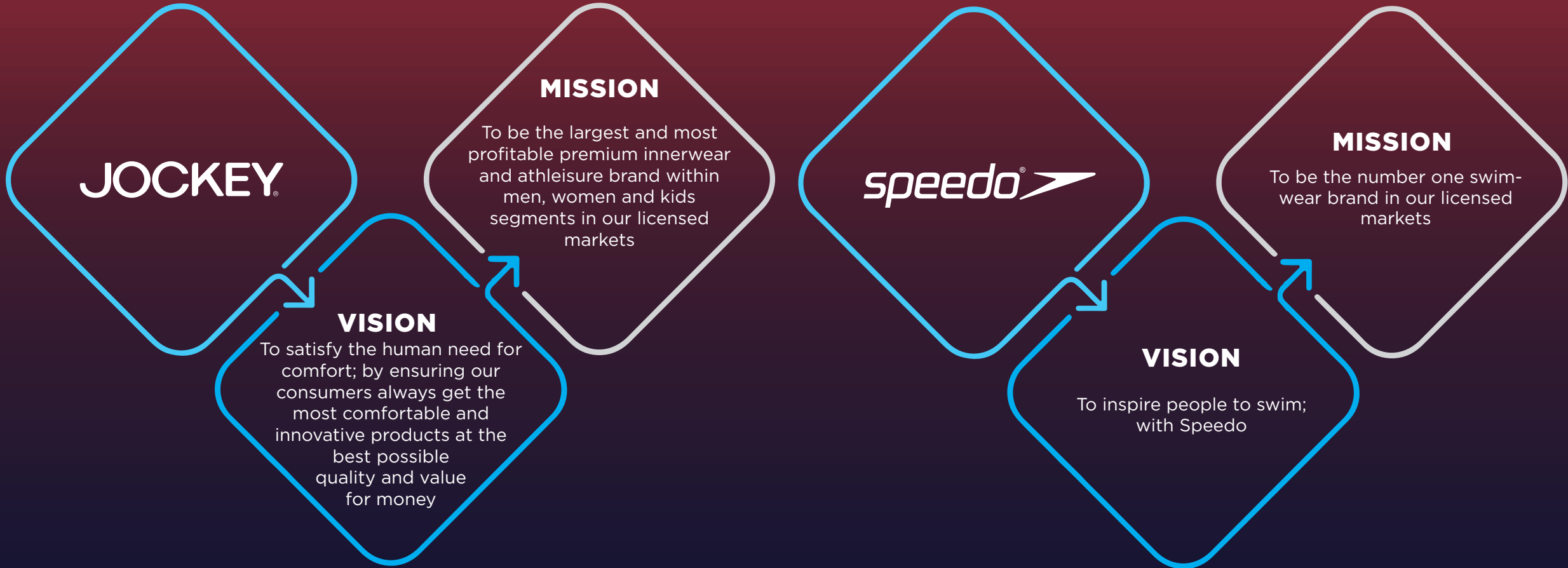


COMPANY OVERVIEW

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- KEY HIGHLIGHTS
- MULTIPLE PRODUCTS OFFERING
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- UNMATCHED MARKET COVERAGE
- EXTENSIVE BRAND REACH
- MANUFACTURING CAPABILITIES
- FINANCIAL HIGHLIGHTS
- SUSTAINABILITY
- SHAREHOLDING PATTERN

PAGE INDUSTRIES: VISION & MISSION STATEMENT



PAGE INDUSTRIES: AT A GLANCE



Leading player in Premium Innerwear and Athleisure market



Highly Experienced Professional Management supported by
27,730 Employees
82% Women Employees



Production Capacity
260 mn pieces
15 manufacturing units
Strong backward integration



PAN India Presence
1,10,548+ Retail Network
1,131+ Exclusive Business Outlets (EBO's)
2,800+ Large Format Stores (LFS) & E-Commerce



Strong Financial Performance
Healthy ROCE 68%
Debt Free

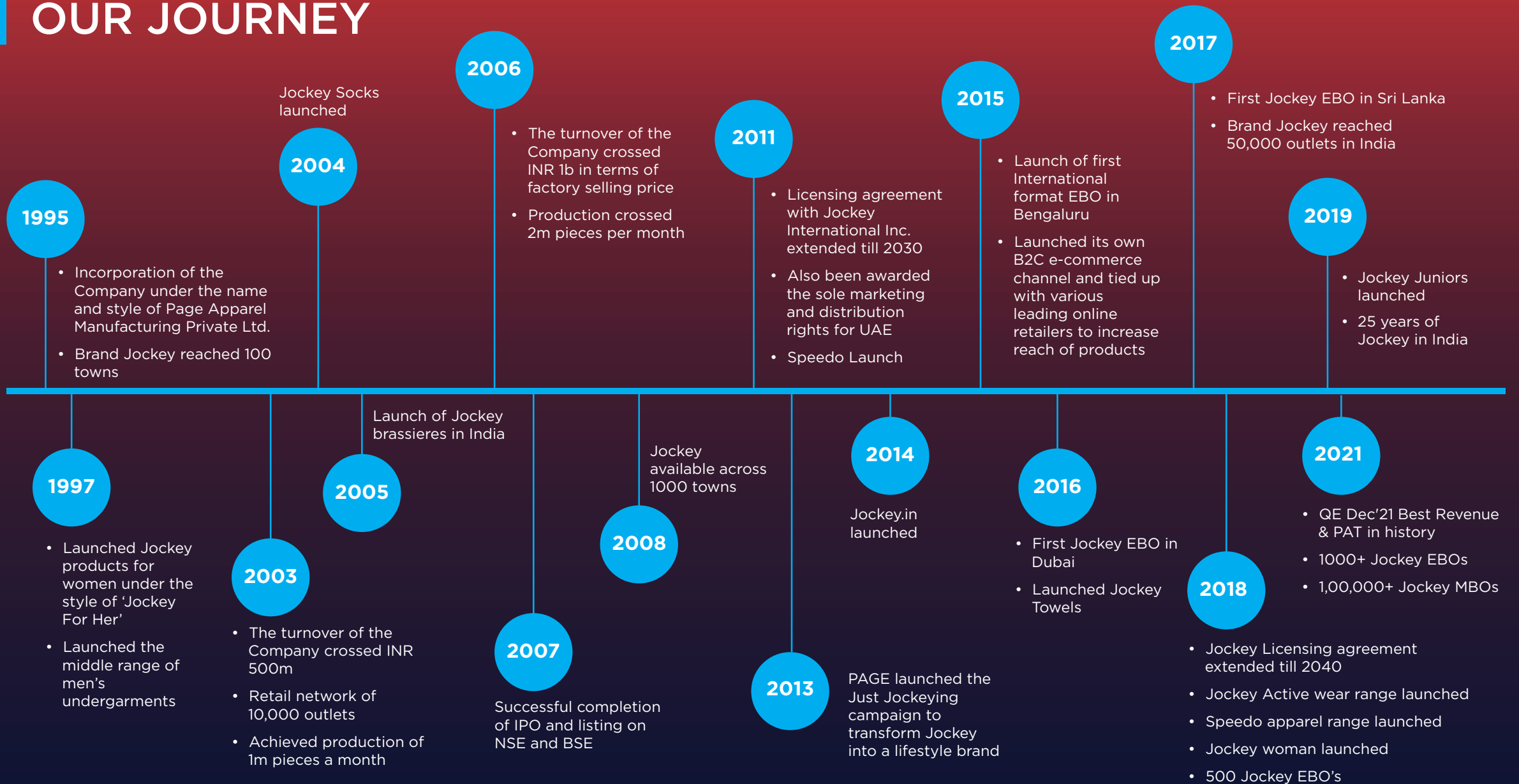
JOCKEY®

- Jockey is world's best-loved and most recognisable brand. Active in more than 120 countries
- Exclusive licensee of **JOCKEY International Inc. (USA)** for manufacture, distribution and marketing in India, Sri Lanka, Bangladesh, Nepal, Oman, Qatar, Maldives, Bhutan and UAE
- Products include **Innerwear, Athleisure, Socks for Men and Women, Thermal, Towels, Handkerchief, Caps and Face Mask**

speedo®

- Speedo International Ltd. is a manufacturer and distributor of swimwear and swimming accessories based in Nottingham, UK
- Exclusive licensee of **Speedo International Ltd.** for manufacture, distribution and marketing in India
- Products include **Swimwear, Equipment, Water shorts, Apparel and Footwear**

OUR JOURNEY



MANAGEMENT GROWTH INITIATIVES

Capacity Ramp-up in both Manufacturing and Sales

Expanding Channel presence in distribution, Exclusive Brand outlets, Large Format Stores & E-Commerce

Expanding investments and spends in Sales and Marketing at Point of Sale

Enhance investments in R&D, Product Development and Innovation, Automation and Digital Transformation



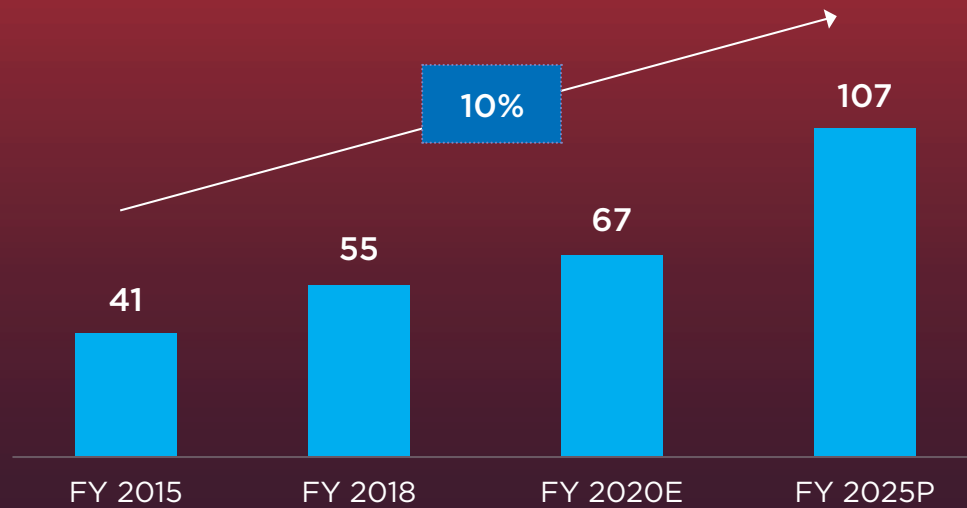
A photograph of a retail store interior, likely a clothing boutique. The store is well-lit with track lighting and a large black pendant light. Clothing is displayed on racks and shelves. A sign in the background reads "MOVE X PAUSE APPAREL THAT WORKS FOR BOTH". Another sign on the left says "A timeline of greatness." and "THE ONLY ONE". A sign on the right says "AMERICANA".

ATTRACTIVE MACRO OPPORTUNITY

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ATTRACTIVE MACRO: MULTIPLE DRIVERS FOR GROWTH



Indian Fashion Market (USD Bn)

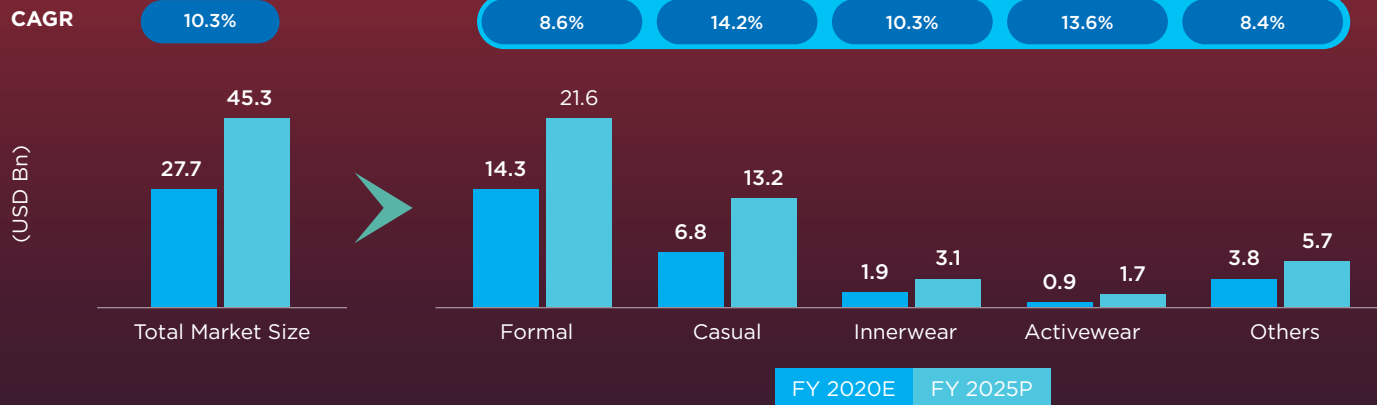
The market is projected to grow at 10 percent and reach USD 107 bn by FY 2025.

Industry Growth Drivers

- HIGHER DISPOSABLE INCOME
- 15 - 34 YRS LARGEST CONSUMER GROUP
- INCREASE IN URBAN POPULATION
- INCREASED SHIFT IN ORGANISED RETAIL
- HIGH GROWTH MIDDLE, PREMIUM, SUPER- PREMIUM SEGMENT
- INCREASED INVOLVEMENT IN BRANDED INNERWEAR
- MORE DISCERNING CONSUMERS
- HIGHER ASPIRATION FOR GLOBAL BRANDS

ATTRACTIVE MACRO: INDIAN APPAREL MARKET SEGMENTS

Men's Apparel Market

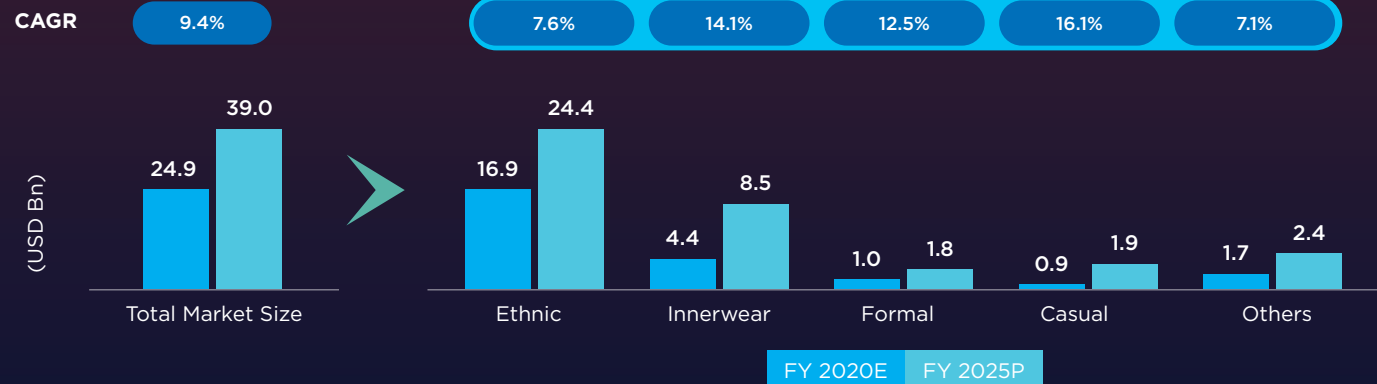


Men's innerwear category in FY2020 is estimated to be USD 1.9 bn and is expected to grow at a CAGR of 10.3 percent to USD 3.1 bn in FY 2025.

Men's casual and activewear category in FY2020 is estimated to be USD 7.7 bn and is expected to grow at a CAGR of 13.9 percent to USD 14.9 bn in FY 2025.

Women's casualwear category in FY2020 is estimated to be USD 0.9 bn and is expected to grow at a CAGR of 16.1 percent to USD 1.9 bn in FY 2025.

Women's Apparel Market



Women's innerwear category in FY2020 is estimated to be USD 4.4 bn and is expected to grow at a CAGR of 14 percent to USD 8.5 bn in FY 2025.

The kids wear market in India is currently about USD 14 bn (FY 2020) and is expected to grow at a CAGR of 10.5 percent and grow to nearly USD 23 bn by FY 2025.

KEY HIGHLIGHTS

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KEY HIGHLIGHTS

- MBO - Added 32,548 in FY2022, now present in 1,10,548+ stores and 2,850+ cities and towns
- EBO - Added 193 in FY2022, now present in 1,131+ stores and 387+ cities
- LFS - Added 4 LFS & 440+ stores in FY2022, now present with 26 partners in 2,800+ stores
- With robust demand we achieved the best financial year in our history, in terms of revenue and PAT
- Continue to be debt-free during this year

A photograph of a retail store interior, likely a lingerie boutique. The store features white shelving units with glass doors, displaying various items of lingerie such as bras, panties, and pajamas. The displays are arranged in rows, with some items hanging and others folded. A sign above one of the displays reads "Lingerie that fits like no other". The lighting is bright, and the overall atmosphere is clean and organized.

MULTIPLE PRODUCTS OFFERING

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JOCKEY PRODUCT PORTFOLIO

JUNIORS BOYS

VESTS
BRIEFS
TRUNKS
BOXER SHORTS
T-SHIRTS
POLO T-SHIRTS
TRACK PANTS
SHORTS
SWEAT SHIRTS
JACKETS

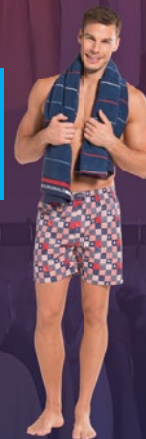


MEN INNERWEAR

VESTS
BRIEFS
BOXER BRIEFS
TRUNKS
BOXER SHORTS
INNER TEES
MIDWAYS

TOWELS

FACE
HAND
BATH



WOMEN INNERWEAR

BRASSIERES
SPORTS BRA
PANTIES
CAMISOLE
CROP TOP
TANK TOPS
SHAPEWEAR
SHORTIES



JUNIORS GIRLS

PANTIES
BLOOMERS
SHORTIES
CAMISOLE
TANK TOPS
T-SHIRTS
SHORTS
CAPRIS
TRACK PANTS
PYJAMAS
SWEAT SHIRTS
JACKETS

OUTERWEAR

BERMUDAS
TRACK PANTS
LOUNGE PANTS
SPORTS SHORTS
T-SHIRTS
POLO T-SHIRTS
GYM VESTS
YOGA PANTS
SLEEPWEAR
JACKETS
TANK TOP
MUSCLE VEST
CAPRIS
LEGGINGS



FACE MASK



THERMAL MEN, WOMEN & KIDS

TANK TOP
CAMISOLE
VEST
LEGGINGS
T-SHIRT
LONG JOHN



SOCKS

CALF
ANKLE
LOW SHOW
NO SHOW



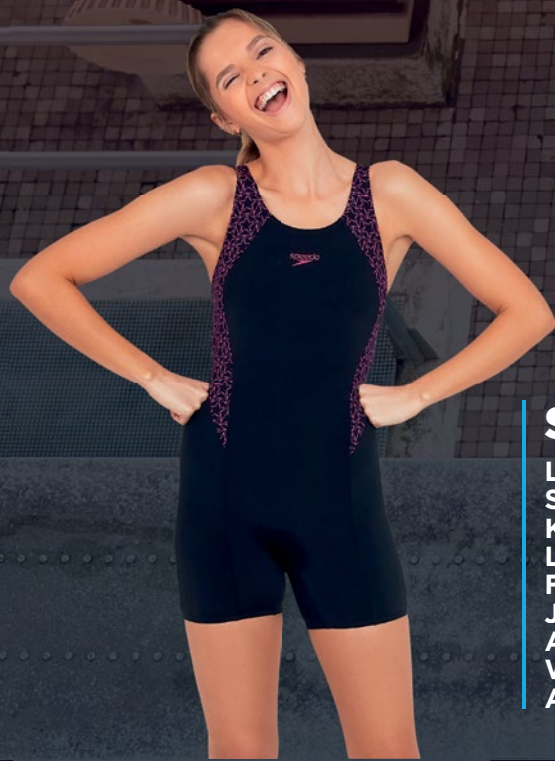
CAPS



HANDKERCHIEF



SPEEDO PRODUCT PORTFOLIO



SWIMWEAR

LEISURE
SWIMDRESS
KNEESUIT
LEGSUIT
FULL BODY SUIT
JAMMER
AQUASHORTS
WATERSHORTS
ALL-IN-ONE SUIT



SWIMACTIVE

H2O ACTIVE
SUN TOP
CAPRI
LEGGING
WATERSHORT



EQUIPMENT

GOGGLES
CAPS
TRAINING AID
SWIM CONFIDENCE



FOOTWEAR

SLIDE
THONG



A photograph of a retail store interior, likely for underwear. On the left, a mannequin is dressed in a black tank top and black lace underwear. To the right, there are several tall, black metal shelving units filled with various packages of underwear. A large, semi-transparent purple and red graphic overlay is positioned in the center-left of the image, containing the text 'NEW LAUNCHES'.

NEW LAUNCHES

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JOCKEY - NEW LAUNCHES



Style No. 2718
T-shirt



Style No. AB39
Polo



Style No. AG70
T-shirt



Style No. IM05
Shorts



Style No. MW13
Performance Capri

Style No. MW62
T-shirt



A photograph of a retail store interior, likely a clothing boutique. The store features white shelving units with various clothing items, including socks and underwear, displayed on hangers and in boxes. A sign at the top left reads "FUN MUST BE TAKEN SERIOUSLY" and another sign at the top right says "LET'S CREATE SOME TROUBLE". The background is slightly blurred, focusing attention on the products and the text overlay.

UNMATCHED MARKET COVERAGE

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MULTI BRAND OUTLETS: PAN INDIA DISTRIBUTION NETWORK

CHANNEL SALES

4,347+ Distributor Accounts

2,852+ Cities / Towns

1,10,548+ Retail Network

706+ Channel Sales Strength



EXCLUSIVE BRAND OUTLETS: FIRST TO OFFER

1131+ Exclusive Brand Outlets

48 Exclusive Woman Outlets

71 Exclusive Juniors Outlets

16 Factory Outlets

216 Outlets in malls

915+ Outlets in high street

Present in **387+** cities



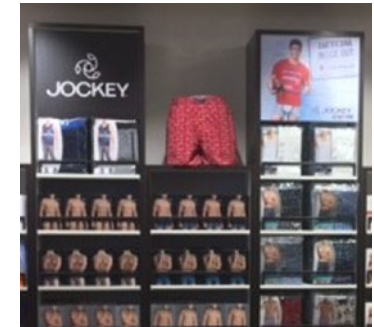
LARGE FORMAT STORES: ENHANCING CUSTOMER REACH



**26 Large Format
partners**



**~ 2,800
Stores**



**~ 4,200
Point of sale across
the country**

**ONLINE & E-COMMERCE:
RIDING THE DIGITAL WAVE**

**EXCLUSIVE ONLINE STORE
jockey.in | speedo.in**

SELLING THROUGH ONLINE KEY PARTNERS



Myntra



**...and
other Partners**

A photograph of a retail clothing store interior. The store is well-lit with modern lighting fixtures. Clothing is displayed on racks and shelves. A sign on the wall reads "AMERICAN INSIDE OUT". In the foreground, there are tables with folded clothing items. A "JOCKEY" brand sign is visible on a display case on the right.

EXTENSIVE BRAND REACH

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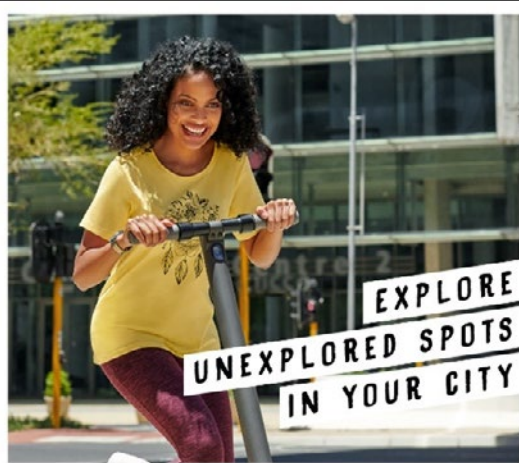
DIGITAL/SOCIAL MEDIA REACH



YOUR SUMMER PLANS
JUST GOT COOLER

Live The City
in Jockey Athleisure

JOCKEY
ATHLEISURE



EXPLORE
UNEXPLORED SPOTS
IN YOUR CITY

Live The City
in Jockey Athleisure

JOCKEY
ATHLEISURE



HOLIDAY
MISCHIEF

JOCKEY
JUNIORS

Wrap yourself in luxury
Premium towels that impress



JOCKEY



MAKE NEW
MEMORIES
IN YOUR CITY

Live The City
in Jockey Athleisure

JOCKEY
ATHLEISURE



POSE
THE CITY

Live The City
in Jockey Athleisure

JOCKEY
ATHLEISURE



#AB09

#AB10

BREEZY-
COOL

JOCKEY
JUNIORS

Incredibly soft
Delight for your skin



JOCKEY

Followers



9,49,647



2,44,172



22,308



19,401



24



MANUFACTURING CAPABILITIES

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MANUFACTURING CAPABILITIES

STRONG IN-HOUSE MANUFACTURING CAPABILITIES

- Facilities spread over 2.2 million sq ft across 15 manufacturing units
- Present in 14 locations in Karnataka and 1 in Tamil Nadu
- >70% in-house manufacturing



KR Pet Unit



Sewing Unit



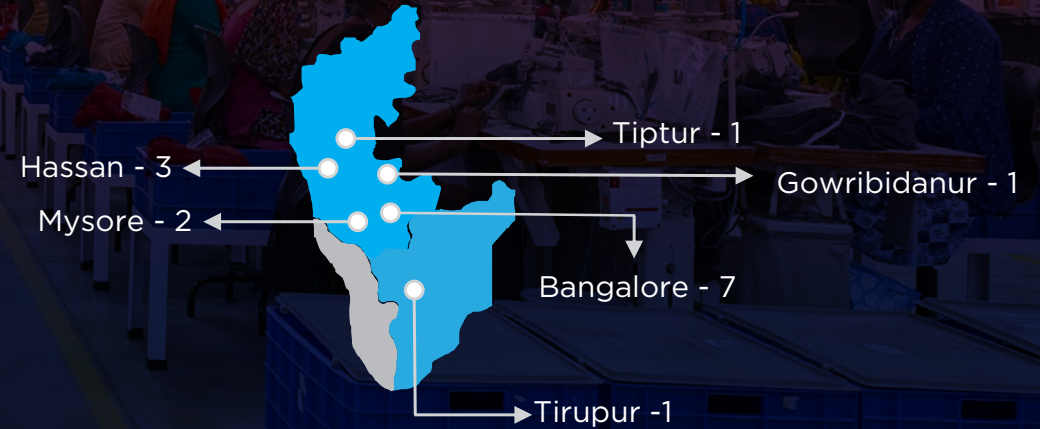
Socks Knitting



Quality Control Unit

COMMITTED TO QUALITY

- Our own manufacturing helps set high quality standards for both in-house and outsourced manufacturing
- Monitor every stage of manufacturing process: Designing, Raw Materials, Production Process, Packaging and Final Products

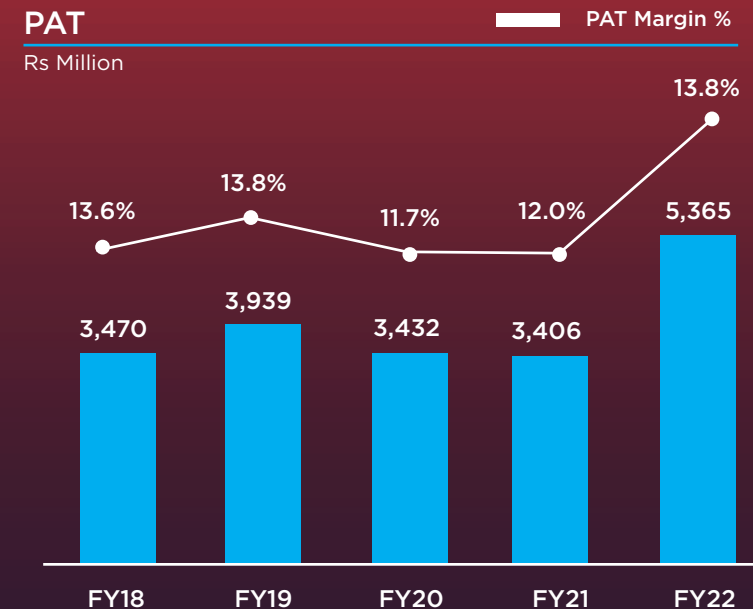
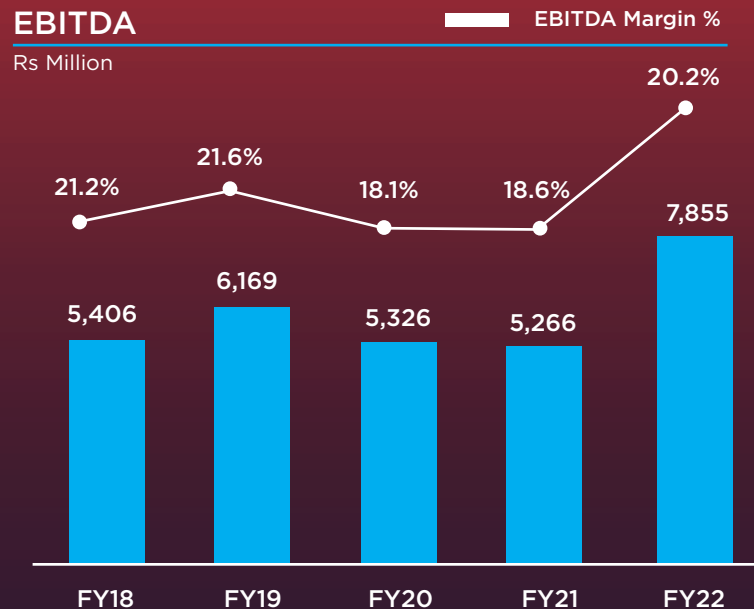
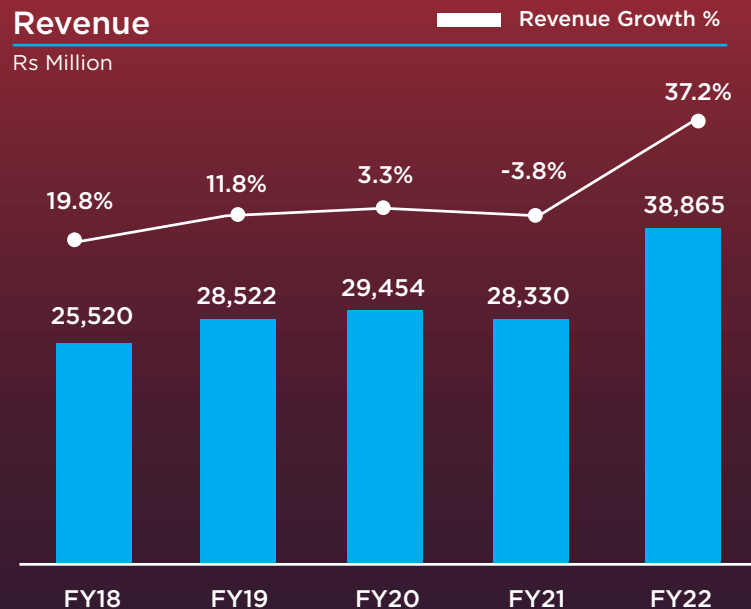


FINANCIAL HIGHLIGHTS

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PROVEN TRACK RECORD OF FINANCIAL PERFORMANCE



Delivered Growth and continuous margin expansion

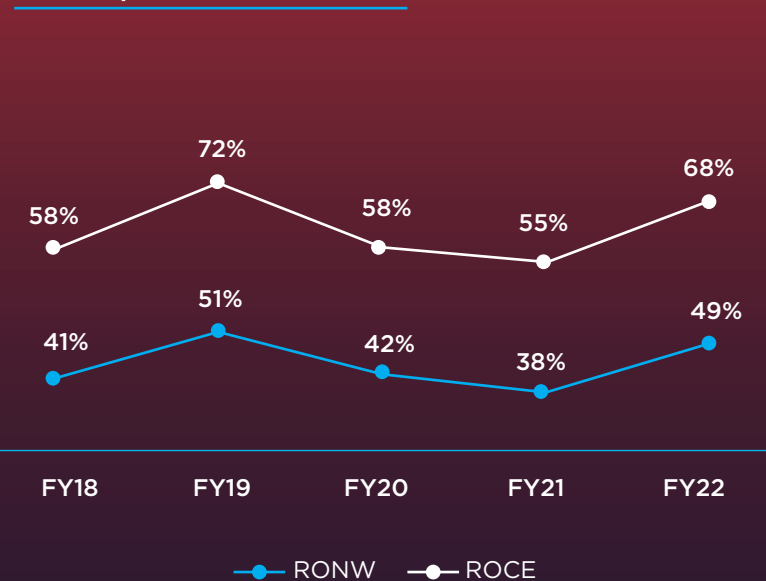
Strong
Brand Value

Expansion of
Distribution
Network

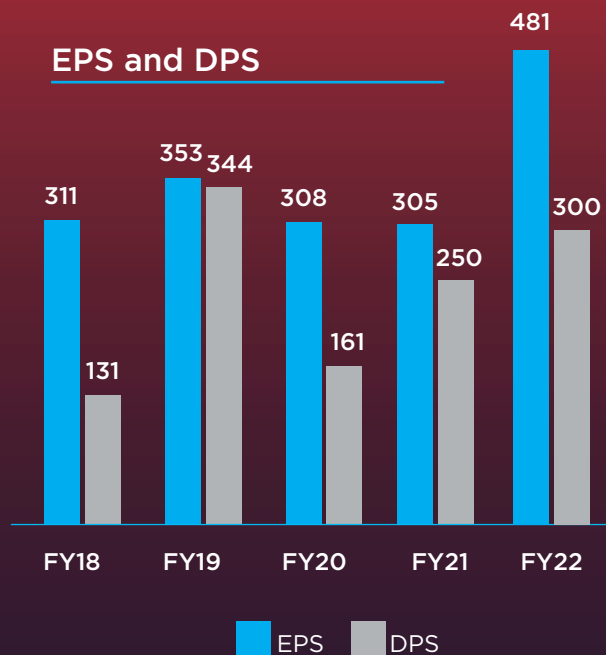
Focus on
Profitable Growth

PROVEN BALANCE SHEET STRENGTH

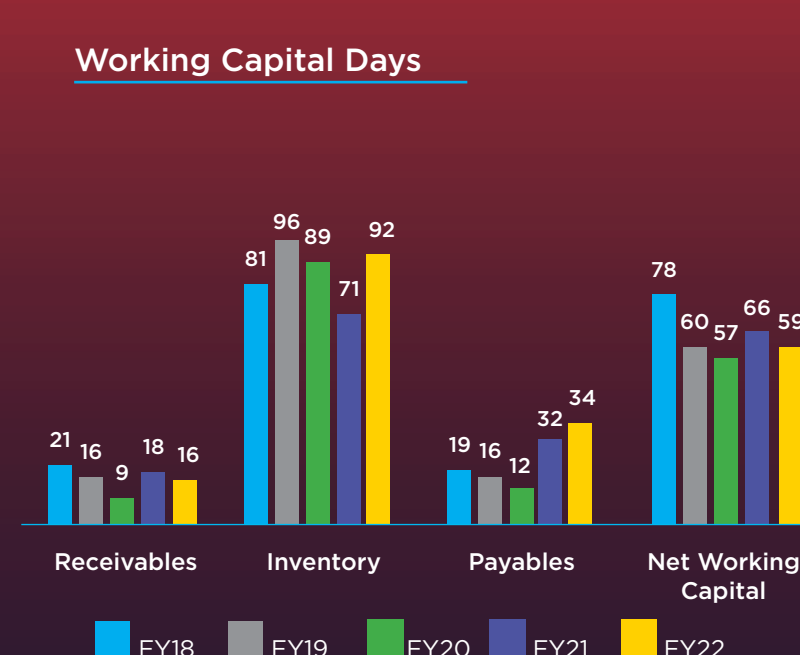
RONW/ROCE



EPS and DPS



Working Capital Days



Investing in future, through strong internal accruals, while maintaining debt-free status and generating high ROCE.



PROFIT AND LOSS STATEMENT: FULL YEAR

Financials (INR mn)	FY 22	%	FY 21	%	YoY growth
Revenue	38,865	100.0%	28,330	100.0%	37.2%
COGS	17,090	44.0%	12,639	44.6%	35.2%
Employee Cost	7,201	18.5%	5,638	19.9%	27.7%
Other operating cost	6,719	17.3%	4,787	16.9%	40.4%
Emp + operating cost	13,920	35.8%	10,424	36.8%	33.5%
EBITDA	7,855	20.2%	5,266	18.6%	49.2%
Other Income	210	0.5%	195	0.7%	7.8%
Depreciation	655	1.7%	629	2.2%	4.1%
Finance Cost	322	0.8%	297	1.0%	8.3%
PBT	7,088	18.2%	4,534	16.0%	56.3%
Tax	1,723	4.4%	1,128	4.0%	52.7%
PAT	5,365	13.8%	3,406	12.0%	57.5%

PROFIT AND LOSS STATEMENT: QUARTERLY

Financials (INR mn)	Q4FY22	%	Q3FY22	%	Q4FY21	%	QoQ growth	YoY growth
Revenue	11,111	100.0%	11,898	100.0%	8,808	100.0%	-6.6%	26.2%
COGS	4,508	40.6%	5,563	46.8%	3,733	42.4%	-19.0%	20.8%
Employee Cost	2,006	18.1%	1,900	16.0%	1,648	18.7%	5.5%	21.7%
Other operating cost	1,927	17.3%	1,927	16.2%	1,729	19.6%	0.0%	11.5%
Emp + operating cost	3,932	35.4%	3,828	32.2%	3,377	38.3%	2.7%	16.5%
EBITDA	2,671	24.0%	2,507	21.1%	1,698	19.3%	6.5%	57.3%
Other Income	49	0.4%	71	0.6%	56	0.6%	-31.0%	-11.3%
Depreciation	164	1.5%	167	1.4%	156	1.8%	-2.1%	5.0%
Finance Cost	97	0.9%	77	0.6%	72	0.8%	25.0%	35.0%
PBT	2,460	22.1%	2,334	19.6%	1,526	17.3%	5.4%	61.2%
Tax	555	5.0%	589	4.9%	371	4.2%	-5.8%	49.7%
PAT	1,905	17.1%	1,746	14.7%	1,156	13.1%	9.1%	64.9%

GROSS MARGIN

Financials (INR mn)	Q4,FY22	Q4,FY21		FY22	FY21
Revenue*	10,695	8,631		37,406	27,797
Material consumed*	4,086	3,345		15,585	11,860
Sub contract costs #	510	349		1,575	1,058
Contribution	6,099	4,937		20,245	14,879
Contribution %	57.0%	57.2%		54.1%	53.5%
Other manufacturing costs	1,492	1,058		5,261	3,507
Gross Profit	4,606	3,879		14,984	11,372
Gross Margin %	43.1%	44.9%		40.1%	40.9%

* excludes Revenue, Cost and Profit/Loss on sale of RM to Outsourced vendors and sale of Non Moving Inventory

Sub contract costs are incurred for processing yarn to fabric and shown under other operating costs in P&L

BALANCE SHEET

Assets (Rs Million)	FY22	FY21	FY20
Non Current Assets			
Fixed Assets	3,766	3,165	3,298
Financial Assets	221	213	257
Other Non Current Assets	1,401	1,370	1,430
Total Non Current Assets	5,389	4,748	4,984
Current Assets			
Inventories	9,749	5,549	7,186
Trade receivables	1,651	1,371	738
Cash and Bank Balances	2,835	4,350	1,169
Other Financial Assets	58	70	73
Other Current Assets	1,389	910	980
Total Current Assets	15,681	12,251	10,145
Total Assets	21,069	16,999	15,129

Total Equity & Liabilities (Rs Million)	FY22	FY21	FY20
Equity Share Capital	112	112	112
Reserves and Surplus	10,775	8,737	8,087
Total Equity	10,886	8,849	8,199

Total Equity & Liabilities (Rs Million)	FY22	FY21*	FY20
Non Current Liabilities			
Borrowing	-	-	201
Other Non Current Liabilities	820	1,027	1,164
Total Non Current Liabilities	820	1,027	1,365
Current Liabilities			
Borrowing	0	0	68
Trade payables	3,628	2,508	938
Other Financial Current liabilities	4,564	3,706	3,631
Other Current Liabilities	1,171	909	929
Total Current Liabilities	9,364	7,123	5,566
Total Liabilities	10,183	8,150	6,931
Total Equity & Liabilities	21,069	16,999	15,129

Note : Lease liabilities and assets as per Ind-AS 116 have been grouped under Other current, non-current liabilities and assets respectively

* Previous year figures have been regrouped / reclassified, wherever necessary



KEY INVESTMENT HIGHLIGHTS



SUSTAINABILITY

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SUSTAINABILITY CULTURE

VISION

To be a leading apparel company through balanced growth with a focus on quality, innovation and sustainable design, thereby, creating lasting value for all our stakeholders

Commitment to Sustainability

- Public disclosure through sustainability report, corporate presentations and annual publications
- Communicate through product development and retail services
- Commitment to WASH and contribution to Sustainability Development Goals

Building Capacity

- Comparing processes and business practices to industry-bests
- Modifying existing systems and processes to achieve improved efficiency
- Invest in R&D and technology for process improvements
- Increasing focus on sustainability initiatives and projects

Fostering Commitment

- Integrating sustainability into vision, mission, value and governance practices
- Developing policies, framework and guidelines
- Setting annual sustainability targets and goals
- Allocation of resources

Raising Awareness

- Motivate employees to participate through awareness programs and workshops
- Internal competitions as a means to generate and identify new ideas
- Posters and fliers promoting sustainability practices and behaviour

Assigning Responsibility

- Engaging the board and senior management by establishing sustainability committees
- Linking incentives to performance on sustainability goals and targets
- Identifying, training and assigning responsibility to sustainability champions

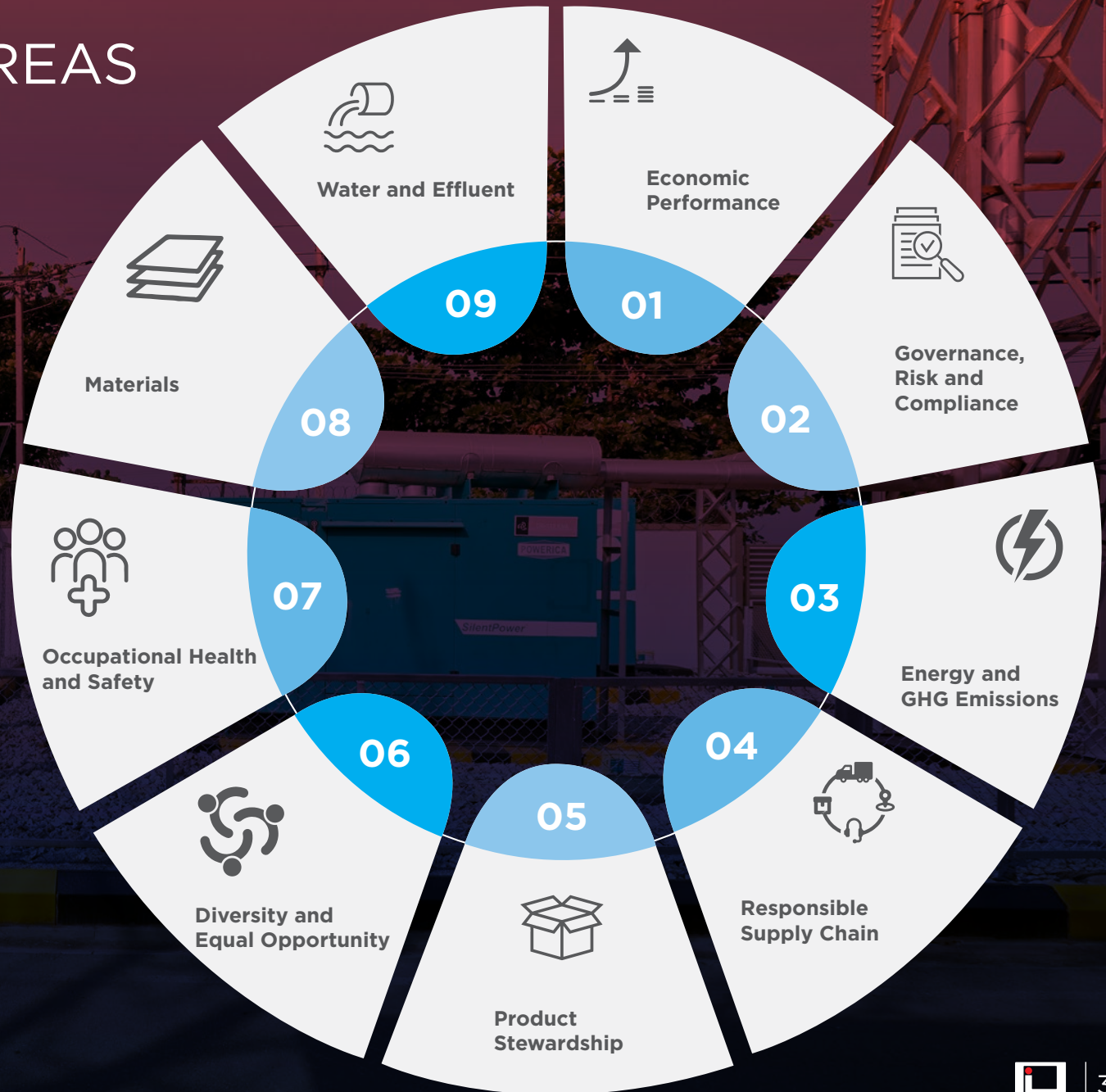
Monitoring and Evaluation

- Continuous monitoring and evaluation of performance against set goals
- Effective feedback
- Monitoring effectiveness of employee awareness

SUSTAINABILITY FOCUS AREAS

Page sustainability focus areas cover all aspects of value chain viz., product development, supply chain & logistics, manufacturing, sales & marketing and economic performance.

9 focus areas identified based on our material assessment and industry best practices.



SUSTAINABILITY FOCUS AREAS



Economic Performance

Sustain strong financial performance by tracking economic value generated and distributed, assess and address the financial implications of sustainability risks and investing in sustainability projects



Compliance

Ensuring Compliance to all legal and statutory requirements by maintaining compliance score cards and creating awareness among third-party/outsourcing factories



Energy and GHG Emissions

Reduce our energy intensity by investing in energy efficiency initiatives, adopting renewable energy and consequently reduce direct and indirect emissions



Responsible Supply Chain

Align sustainability across supply chain and drive responsible business operation by enhancing supplier sustainability assessments, vendor and supplier code of conduct and a responsible chemical management policy



Product Stewardship

Enhancing the share of sustainable packaging and product sustainability attributes such as renewable and recycled materials, vendor certifications and Life Cycle Assessment



Diversity and Equal Opportunity

To ensure a diverse and inclusive workplace through policies, pay parity, infrastructural support and motivation



Occupational Health and Safety

Promote a zero harm workplace



Materials

Ensuring raw materials used in our products are sustainable in terms of impact on the environment, safety of our customers and highest quality and packaging materials are recycled 100%



Water and Effluents

Reduce fresh water consumption by adopting innovative water efficient technologies and increasing the percentage of water recycled and reused

Sustainability Report 2020-2021: [View here](#)

SHAREHOLDING PATTERN

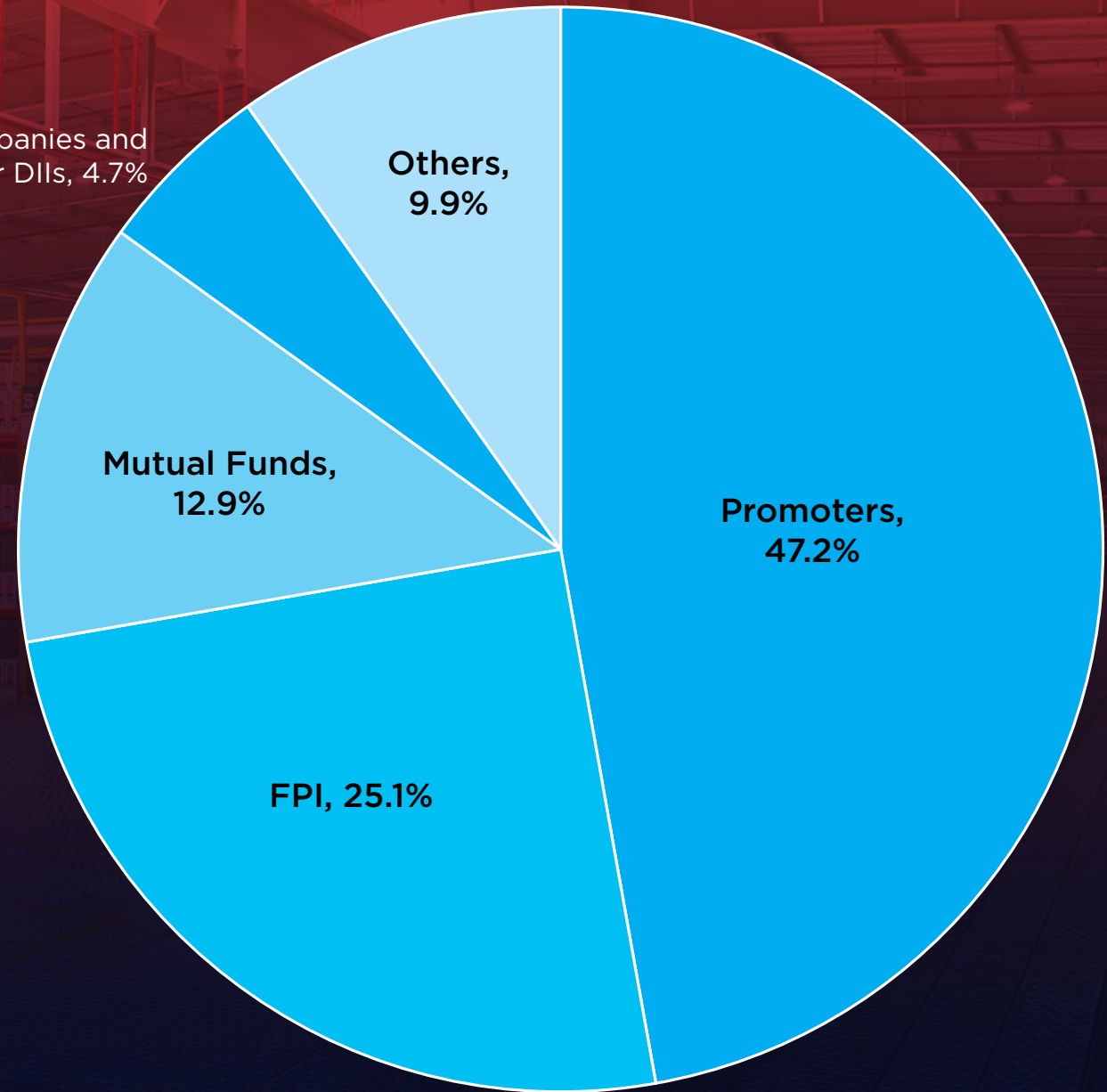
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SHAREHOLDING PATTERN

As of 31st March 2022

Insurance Companies and
Other DIIs, 4.7%



Market Cap: ~ INR 472 bn

(as on 23rd May, 2022)



THANK YOU

PAGE INDUSTRIES LIMITED

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