



# PERFORMANCE HIGHLIGHTS Q3FY21

 PAGE INDUSTRIES LIMITED

**FEBRUARY 10, 2021**

# SAFE HARBOUR STATEMENT

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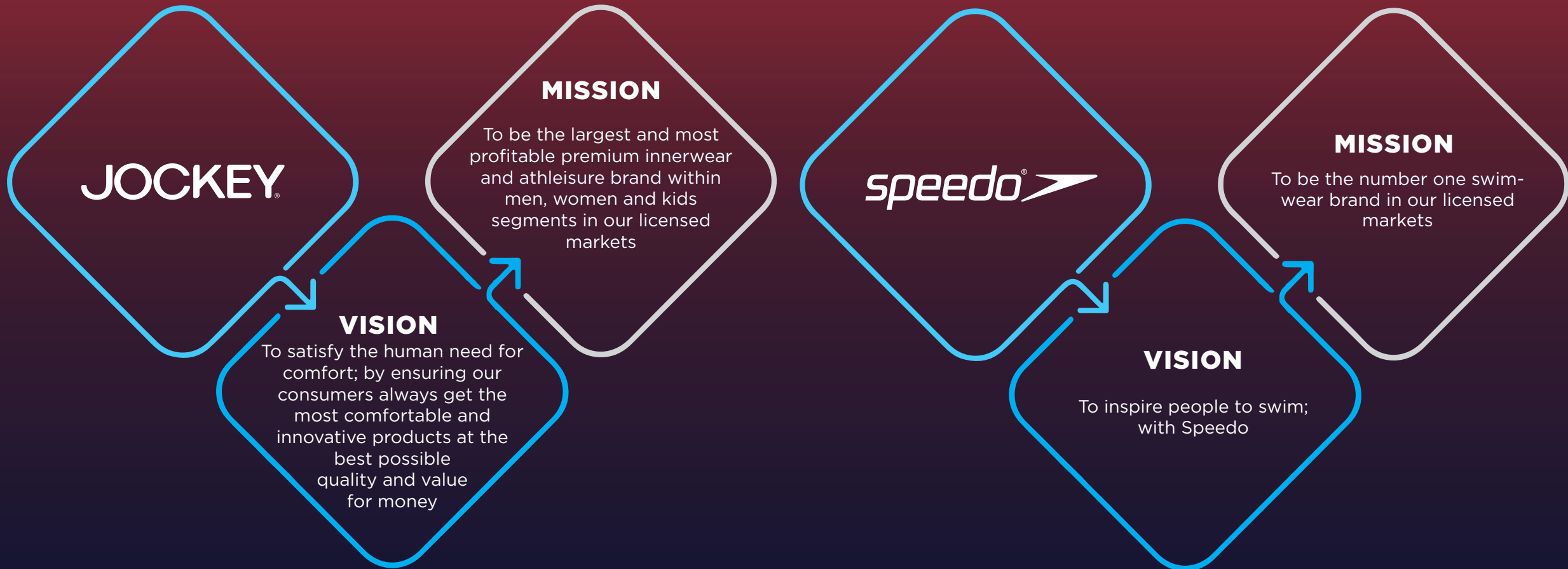
# CONTENTS



## COMPANY OVERVIEW

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- ATTRACTIVE MACRO OPPORTUNITY
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- MULTIPLE PRODUCTS OFFERING
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- UNMATCHED MARKET COVERAGE
- EXTENSIVE BRAND REACH
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- 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  
20,600+ Employees  
*79% Women Employees*



**Production Capacity**  
260 mn pieces  
15 manufacturing units  
Strong backward  
integration



**PAN India Presence**  
72,300+ Retail Network  
870+ Exclusive Business Outlets (EBO's)  
Increasing presence in  
Large Format Stores (LFS)  
& E-Commerce



**Strong Financial  
Performance**  
Healthy ROCE 58%  
Debt Free

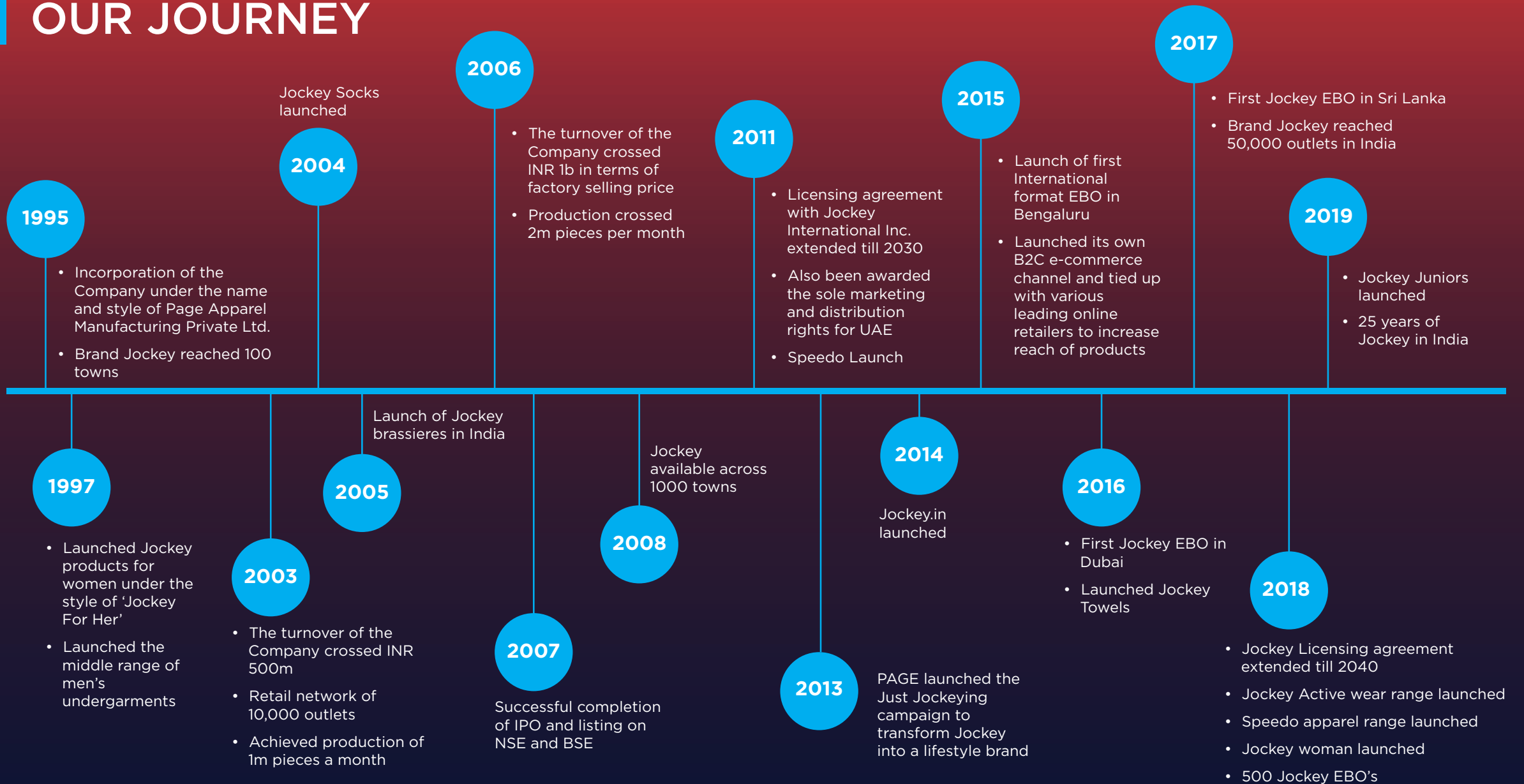
## JOCKEY®

- 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 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





# ATTRACTIVE MACRO OPPORTUNITY

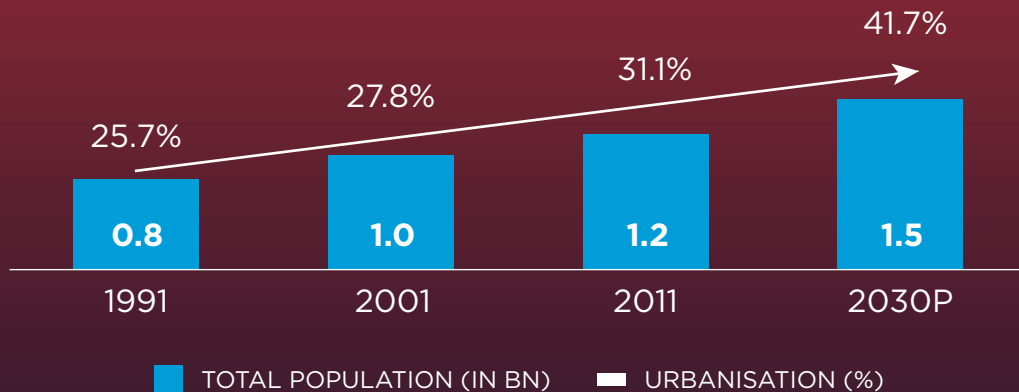
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# ATTRACTIVE MACRO: MULTIPLE DRIVERS FOR GROWTH

## Favourable Demographics



Increase in Propensity to spend, leading to increase in demand for improved products



Per Capita Income CAGR of ~10% over last 5 years



Metropolitan cities in India to rise from **46 in 2011 to 68 in 2020**



Increasing urban women population and corporate workforce



Increase in trend towards swimming for various reasons such as, Healthy Living & Weight Management, Fitness, Relaxation and Hobby

## 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

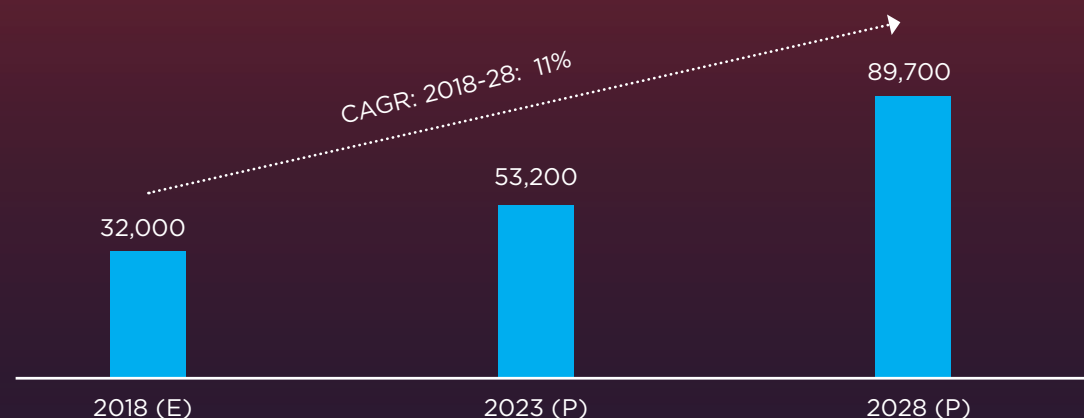


HIGHER  
ASPIRATION FOR  
GLOBAL BRANDS

# ATTRACTIVE MACRO: LARGE MARKET

## Indian Innerwear Market

- Among all the fashion categories, innerwear is one of the fastest growing categories over the last few decades
- Domestic demand of innerwear has changed with consumer buying behavior, transforming from need based to aspiration based, coupled with increased fashion consciousness among millennials



The men's innerwear market is currently valued at ₹ 11,000 crore and is expected to grow at a CAGR of 7% over the next decade to reach ₹ 21,800 crore by 2028



Women's innerwear segment is poised to grow at an impressive growth rate of 12.5% over the next decade to reach ₹ 68,000 crore by 2028 from current market size of ₹ 21,000 crore

## Indian Outerwear Market



### Athleisure Market

- Athleisure, a phenomenon in world fashion has in the last few years become the most dynamic and fast-growing segments in the India apparel market
- India's athleisure market is ~ ₹ 54,000 crore growing at 18-20%



### Kidswear Market

- With a booming kids population in India and owing to distinct factors like the growing trend of nuclear family system, increased spending on children, greater brand awareness among kids, and better focus on this segment by organized players
- The kids wear market in India is estimated at ₹ 81,900 crores and expected to grow at a CAGR of 8.5% in the next five years



A photograph of a Jockey store interior. In the foreground, there are wooden display tables with black metal frames, showcasing various pieces of men's underwear, including red and black briefs and boxers. In the background, there are shelves and racks filled with folded and hanging clothing items. A mannequin wearing a black tank top is visible in the distance. The store has a modern, clean aesthetic with white walls and recessed ceiling lights. A semi-transparent purple and red gradient bar is overlaid across the middle of the image, containing the text 'KEY HIGHLIGHTS' and a list of content items.

# KEY HIGHLIGHTS

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# KEY HIGHLIGHTS

- Strong growth achieving all-time high Revenue and PAT aided by festive season and increased footfalls due to gradual lifting of the lockdown
- Liquidity continues to remain strong with cash and cash equivalents increasing 23% QoQ and 275% YoY to ₹ 4,941 million
- Retail stores of channel partners' open as of end-December
  - MBO: More than 94% of our outlets are fully functional; 67,500+ outlets
  - EBO: 100% of our outlets have re-opened; 873 outlets
  - LFS: 93% of our stores have re-opened; 2,299 stores
- Successful re-certification of all our units by Worldwide Responsible Accredited Production (WRAP), an independent, objective, non-profit team of global social compliance experts dedicated to promoting safe, lawful, humane, and ethical manufacturing around the world
- Safety precautions and measures continue at manufacturing facilities and retail outlets to ensure customers and employees stay safe
- Repaid all outstanding borrowings during the quarter





# 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 UNDERWEAR

VESTS  
BRIEFS  
BOXER BRIEFS  
TRUNKS  
BOXER SHORTS  
INNER TEES  
MIDWAYS

## 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



## TOWELS

FACE  
HAND  
BATH



## WOMEN UNDERWEAR

BRASSIERES  
SPORTS BRA  
PANTIES  
CAMISOLE  
CROP TOP  
TANK TOPS  
SHAPEWEAR  
SHORTIES



## THERMAL MEN, WOMEN & KIDS

TANK TOP  
CAMISOLE  
VEST  
LEGGINGS  
T-SHIRT  
LONG JOHN



## SOCKS

CALF  
ANKLE  
LOW SHOW  
NO SHOW



## FACE MASK



## CAPS





# SPEEDO PRODUCT PORTFOLIO

## SWIMACTIVE

H2O ACTIVE  
SUN TOP  
CAPRI  
LEGGING  
WATERSHORT

## EQUIPMENT

GOGGLES  
CAPS  
TRAINING AID  
SWIM CONFIDENCE

## SWIMWEAR

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

## FOOTWEAR

SLIDE  
THONG







# NEW LAUNCHES

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# JOCKEY ATHLEISURE - NEW LAUNCHES



Style No. IM21  
T-SHIRT



Style No. MV24  
TRACK PANTS

Style No. MV23  
SHORTS



Style No. AW73  
LEGGINGS



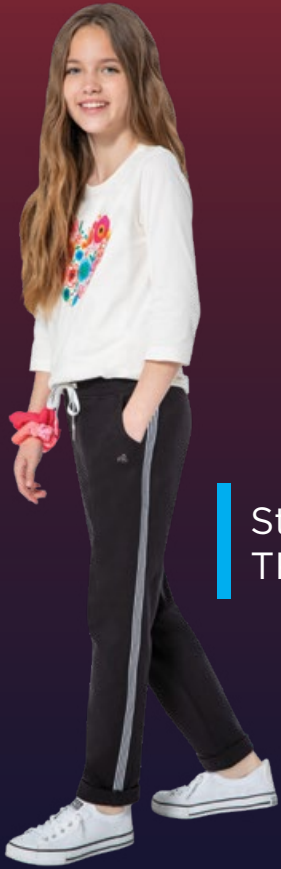
Style No. IW06  
ALL DAY PANTS



Style No. AW46  
T-SHIRT



# JOCKEY JUNIORS - NEW LAUNCHES



Style No. AG44  
TRACK PANTS



Style No. UG22  
JEGGINGS

Style No. CG18  
JOGGER



Style No. AB31  
JOGGER



Style No. CB08  
T-SHIRT

Style No. CB05  
TRACK PANTS







# UNMATCHED MARKET COVERAGE

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# MULTI BRAND OUTLETS: PAN INDIA DISTRIBUTION NETWORK

## CHANNEL SALES

**3,865+** Distributor Accounts

**2,890+** Cities / Towns

**72,300+** Retail Network

**610+** Channel Sales Strength





# EXCLUSIVE BRAND OUTLETS: FIRST TO OFFER

**870+** Exclusive Brand Outlets

**43** Exclusive Woman Outlets

**28** Exclusive Juniors Outlets

**190+** Outlets in malls

**680+** Outlets in high street

Present in **300+** cities





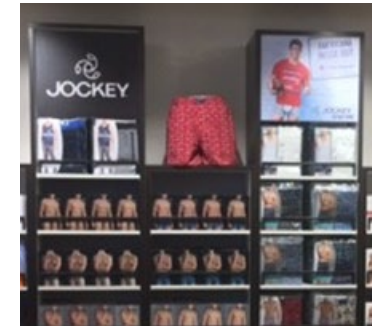
# LARGE FORMAT STORES: ENHANCING CUSTOMER REACH



**23 Large Format  
partners**



**~ 2,450  
Stores**



**~ 3,900  
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**





# EXTENSIVE BRAND REACH

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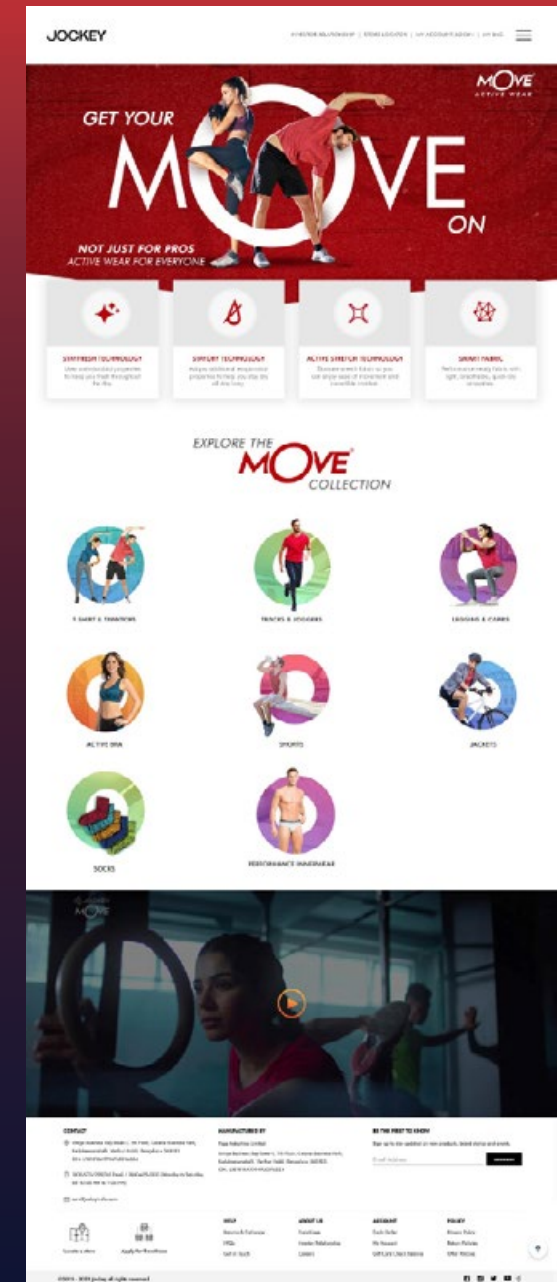
# DIGITAL/SOCIAL MEDIA REACH

## Followers

f 9,33,452

o 1,74,907

t 21,800







# MANUFACTURING CAPABILITIES

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# MANUFACTURING CAPABILITIES

## STRONG IN-HOUSE MANUFACTURING CAPABILITIES

- Facilities spread over 2.4 million sq ft across 15 manufacturing units
- Present in 14 locations in Karnataka and 1 in Tamil Nadu
- >70% in-house manufacturing



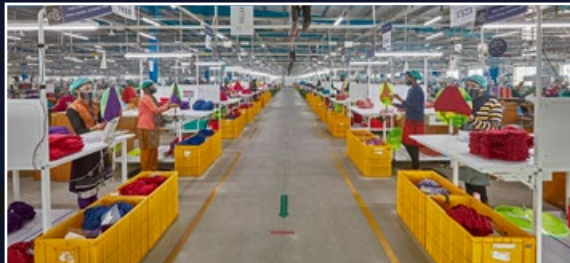
KR Pet Unit



Sewing Unit



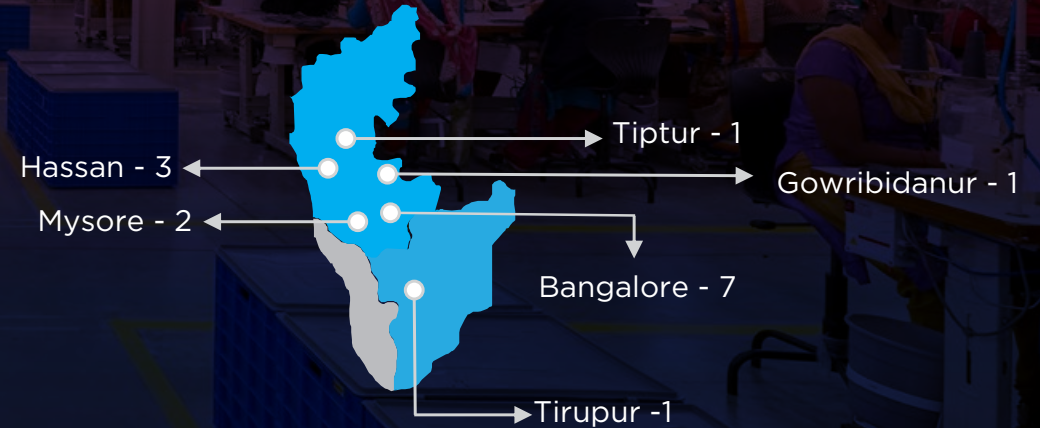
Socks Knitting



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

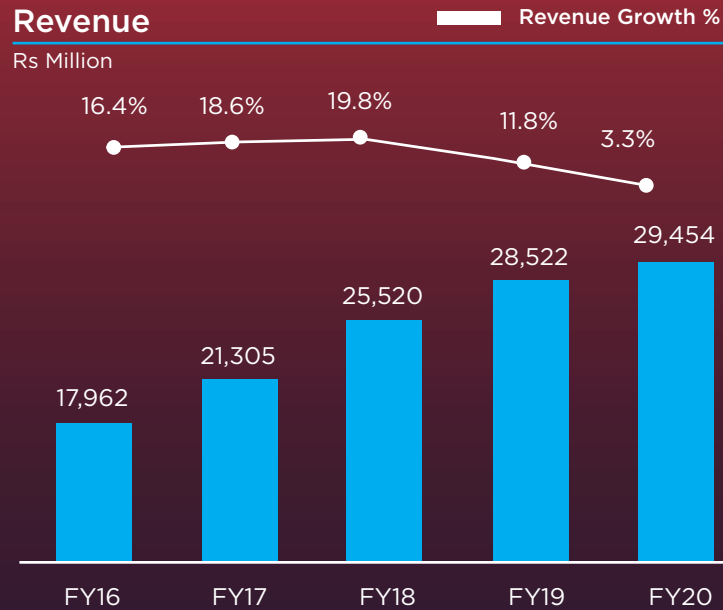
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- **FINANCIAL HIGHLIGHTS**
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# PROVEN TRACK RECORD OF FINANCIAL PERFORMANCE

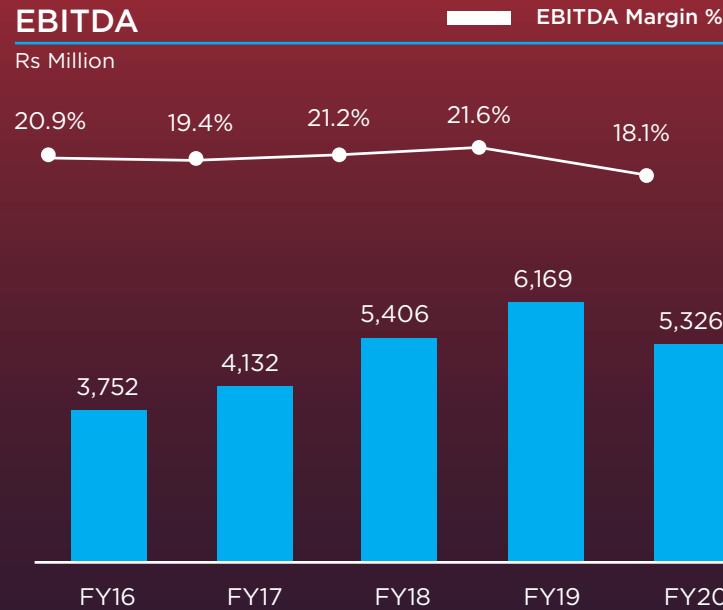
## Revenue

Rs Million



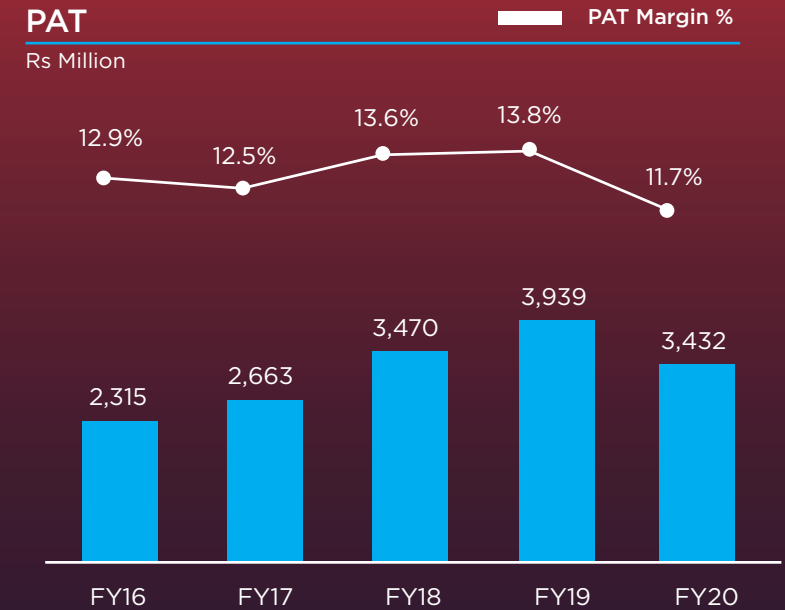
## EBITDA

Rs Million



## PAT

Rs Million



Delivered Growth and continuous margin expansion

Strong  
Brand Value

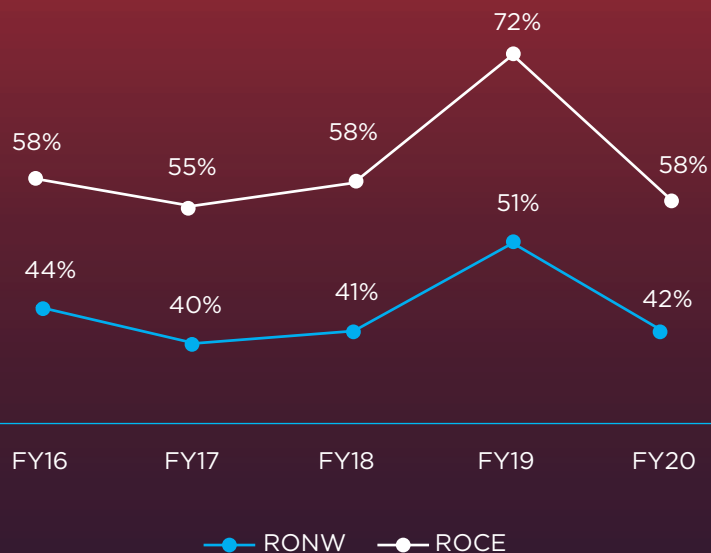
Expansion of  
Distribution  
Network

Focus on  
Profitable Growth

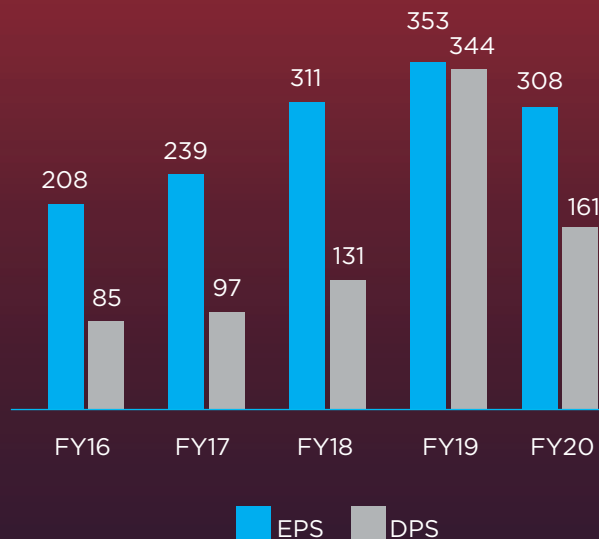


# PROVEN BALANCE SHEET STRENGTH

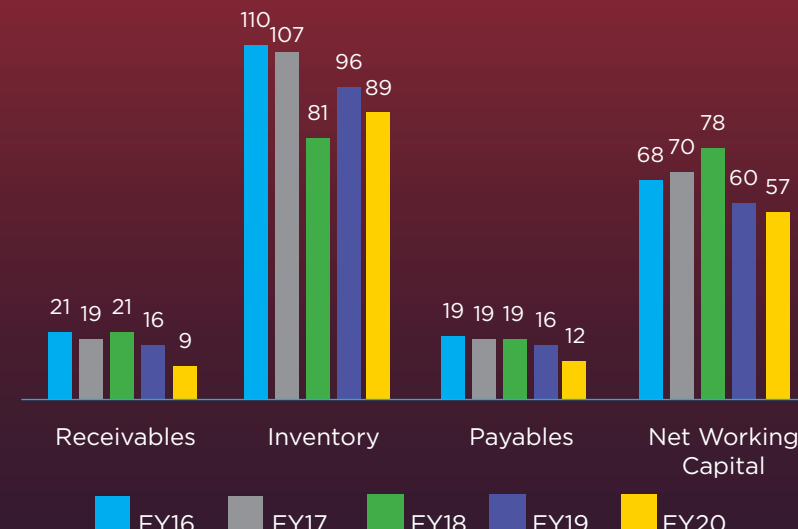
RONW/ROCE



EPS and DPS



Working Capital Days



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

Debt Free

High returns for  
shareholders

Best in class  
Return on Capital  
Employed

# PROFIT AND LOSS STATEMENT: QUARTERLY

| Financials (INR mn)  | Q3FY21       | %           | Q2FY21       | %           | Q3FY20       | %           | QoQ growth | YoY growth |
|----------------------|--------------|-------------|--------------|-------------|--------------|-------------|------------|------------|
| <b>Revenue</b>       | <b>9,271</b> | <b>100%</b> | <b>7,403</b> | <b>100%</b> | <b>7,938</b> | <b>100%</b> | <b>25%</b> | <b>17%</b> |
| COGS                 | 4,131        | 45%         | 3,297        | 45%         | 3,718        | 47%         | 25%        | 11%        |
| Employee Cost        | 1,462        | 16%         | 1,299        | 18%         | 1,346        | 17%         | 13%        | 9%         |
| Other operating cost | 1,417        | 15%         | 1,153        | 16%         | 1,486        | 19%         | 23%        | -5%        |
| Emp + operating cost | 2,878        | 31%         | 2,452        | 33%         | 2,832        | 36%         | 17%        | 2%         |
| <b>EBITDA</b>        | <b>2,261</b> | <b>24%</b>  | <b>1,654</b> | <b>22%</b>  | <b>1,388</b> | <b>17%</b>  | <b>37%</b> | <b>63%</b> |
| Other Income         | 42           | 0%          | 37           | 1%          | 35           | 0%          | 12%        | 19%        |
| Depreciation         | 156          | 2%          | 157          | 2%          | 164          | 2%          | 0%         | -5%        |
| Finance Cost         | 74           | 1%          | 75           | 1%          | 90           | 1%          | -2%        | -18%       |
| <b>PBT</b>           | <b>2,073</b> | <b>22%</b>  | <b>1,459</b> | <b>20%</b>  | <b>1,169</b> | <b>15%</b>  | <b>42%</b> | <b>77%</b> |
| Tax                  | 536          | 6%          | 350          | 5%          | 299          | 4%          | 53%        | 79%        |
| <b>PAT</b>           | <b>1,537</b> | <b>17%</b>  | <b>1,109</b> | <b>15%</b>  | <b>870</b>   | <b>11%</b>  | <b>39%</b> | <b>77%</b> |



# GROSS MARGIN

| Financials (INR mn)       | Q3FY21       | Q3FY20       |  | FY20          |
|---------------------------|--------------|--------------|--|---------------|
| Revenue                   | 9,271        | 7,938        |  | 29,454        |
| Material consumed         | 4,131        | 3,718        |  | 13,108        |
| Sub contract costs #      | 343          | 267          |  | 1,237         |
| <b>Contribution</b>       | <b>4,796</b> | <b>3,953</b> |  | <b>15,109</b> |
| <b>Contribution %</b>     | <b>51.7%</b> | <b>49.8%</b> |  | <b>51.3%</b>  |
|                           |              |              |  |               |
| Other manufacturing costs | 1,026        | 922          |  | 3,536         |
| <b>Gross Profit</b>       | <b>3,770</b> | <b>3,031</b> |  | <b>11,574</b> |
| <b>Gross Margin %</b>     | <b>40.7%</b> | <b>38.2%</b> |  | <b>39.3%</b>  |
|                           |              |              |  |               |
| Other operating costs     | 1,508        | 1,643        |  | 6,248         |
| <b>EBITDA</b>             | <b>2,261</b> | <b>1,388</b> |  | <b>5,326</b>  |
| <b>EBITDA%</b>            | <b>24.4%</b> | <b>17.5%</b> |  | <b>18.1%</b>  |

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

# PROFIT AND LOSS STATEMENT: NINE MONTHS

| Financials (INR mn)  | 9MFY21        | %           | 9MFY20        | %           | YoY growth  |
|----------------------|---------------|-------------|---------------|-------------|-------------|
| <b>Revenue</b>       | <b>19,522</b> | <b>100%</b> | <b>24,043</b> | <b>100%</b> | <b>-19%</b> |
| COGS                 | 8,906         | 46%         | 10,880        | 45%         | -18%        |
| Employee Cost        | 3,989         | 20%         | 3,974         | 17%         | 0%          |
| Other operating cost | 3,058         | 16%         | 4,444         | 18%         | -31%        |
| Emp + operating cost | 7,048         | 36%         | 8,418         | 35%         | -16%        |
| <b>EBITDA</b>        | <b>3,568</b>  | <b>18%</b>  | <b>4,744</b>  | <b>20%</b>  | <b>-25%</b> |
| Other Income         | 139           | 1%          | 147           | 1%          | -6%         |
| Depreciation         | 473           | 2%          | 451           | 2%          | 5%          |
| Finance Cost         | 226           | 1%          | 253           | 1%          | -11%        |
| <b>PBT</b>           | <b>3,008</b>  | <b>15%</b>  | <b>4,188</b>  | <b>17%</b>  | <b>-28%</b> |
| Tax                  | 758           | 4%          | 1,066         | 4%          | -29%        |
| <b>PAT</b>           | <b>2,250</b>  | <b>12%</b>  | <b>3,122</b>  | <b>13%</b>  | <b>-28%</b> |



# 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

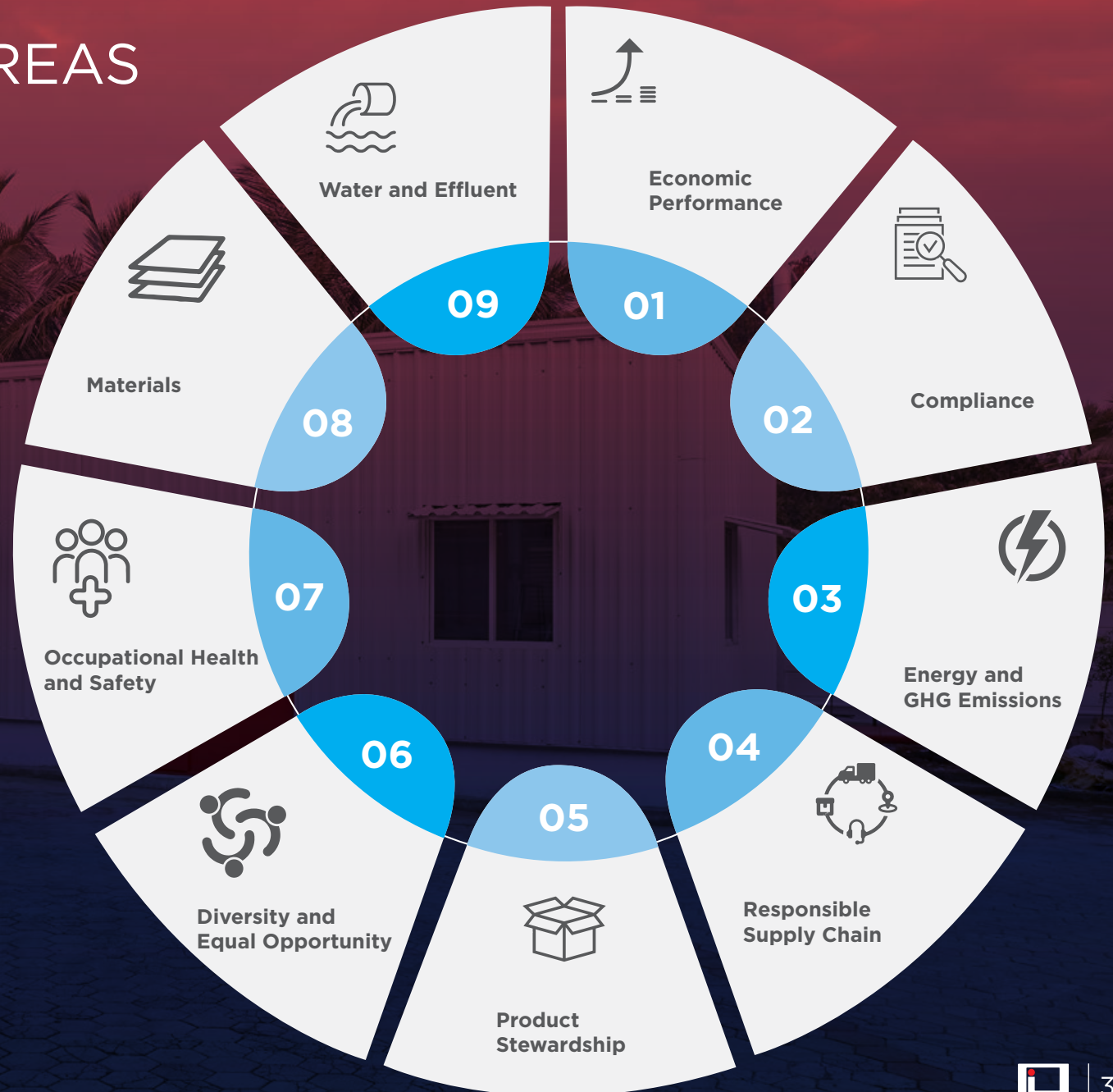
- Engaging the board and senior management by establishing sustainability committees
- Identifying, training and assigning responsibility to sustainability champions

### 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 2019-2020: [View here](#)

The background image shows a laboratory or manufacturing facility. In the foreground, a worker in a white lab coat and blue jeans is working at a long, dark, reflective table. The table is cluttered with various items, including papers, a small blue device, and some orange and blue objects. In the background, another worker in a white lab coat is standing near a red cabinet. The room has a high ceiling with a grid of square light panels. The overall color scheme is dominated by the red of the cabinets and the white of the lab coats.

# SHAREHOLDING PATTERN

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- MANUFACTURING CAPABILITIES
- FINANCIAL HIGHLIGHTS
- SUSTAINABILITY
- SHAREHOLDING PATTERN



# SHAREHOLDING PATTERN

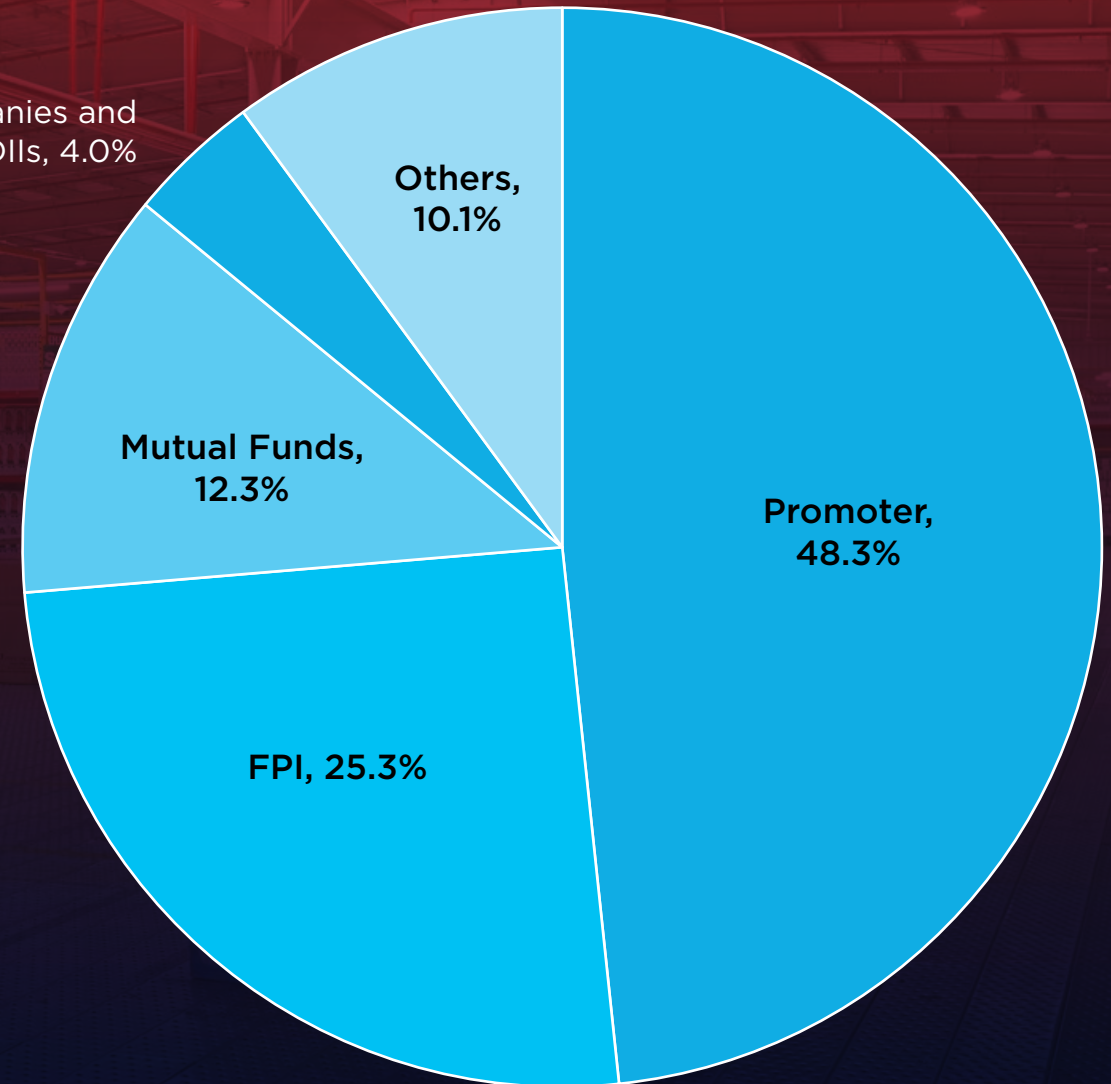
As of 31st December 2020



**Market Cap: ~ INR 310 bn**

(as on 1st February, 2021)

Insurance Companies and  
Other DII, 4.0%





# THANK YOU

## **PAGE INDUSTRIES LIMITED**

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