

Date: 14th February 2023

The Secretary, National Stock Exchange of India Ltd., Exchange Plaza, C-1, Block 'G', Bandra-Kurla Complex, Bandra (E), Mumbai – 400 051	The Secretary, BSE Limited Phiroze Jeejeebhoy Towers, Dalal Street, Mumbai – 400 001
Symbol - DOLLAR	Scrp Code :541403

Dear Sir /Ma'am

Reg: Presentation to be made at Analyst(s)/Institutional Investor(s) meet i.e. “Earnings Call”

Further to our intimation dated 8th February 2023 regarding schedule of Analyst(s)/ Institutional Investor(s) meet i.e. “Earnings Call”, to be held on 15th February 2023 at 4:00 pm (IST) as organized by SMIFS Limited, pursuant to Regulation 30(6) of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, we are hereby enclosing a copy of Investor Presentation on the financials for the quarter and nine months ended on 31st December 2022 and other matters of the Company at the aforesaid Earnings Call.

Please note that the schedule of the aforesaid Earning Call is subject to change. The changes might happen due to exigencies on the part of the Company/ Analyst(s) / Institutional Investor(s).

This is for your information and record.

Thanking you,
Yours sincerely,

For Dollar Industries Limited

Mamta Jain
Company Secretary and Compliance Officer

Encl: As above

DOLLAR INDUSTRIES LTD.

(AN ISO 9001:2015 CERTIFIED ORGANISATION)

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CIN NO. : L17299WB1993PLC058969

50

YEARS STRONGER

Dollar Industries Limited
INVESTOR PRESENTATION Q3FY2023



Completing 50 glorious years

The name '**Dollar**' was inspired from a Raighad stockist; the rationale behind going ahead with this name was it was smart, stylish and had an international feel, which would eventually attract small-town customers.

We are proud to say that our concerted efforts towards ensuring customer satisfaction for all these years, have enabled us to become a household name across the country. We are in the process of graduating our position from just a men's innerwear brand to 'Dollar for All'.

Not only do we have products for men, women and children, we possess a product portfolio that caters to all segments of the society.

We may have come a long way in our journey, but at Dollar, we wake up everyday as if the journey has just started.

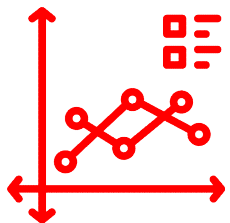
- Mr. Dindayal Gupta

Chairman Emeritus & Founder



What's inside

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QUARTER FINANCIAL HIGHLIGHTS

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Performance highlights

Key Challenges

Volatile Raw
Material Prices

Increase in
Production Cost

Shift in seasonality
and cycle slow
down.

Dent in Gross Profit
Margin

Positive response for newly launched
products –lingerie and Kurti under
Dollar women segment.

Launched new product range in Men's
Active wear in Force Nxt

Strengthening the product portfolio by
launching the new product range in
Women's Athleisure Segment

Opened **12** EBO's till date

Positive Aspect

Growth in revenue
by **2% in** 9MFY23

Increase in Contribution
% of Lakshya Distributors
from **7% to 17%** 9MFY23

No. of Lakshya Distributors
increased from **108 to 203**
in 9M(y-o-y)

Increase in DFS dealers
from **120 in March to**
245 till 9MFY23

Increase in share of revenue
from **3.5 % to 5 %** in Modern
Retail until 9MFY23

Overall **52 %** growth in
Modern Trade & E-com Sales
till 9MFY23

Overall **16 %** growth in
Online Sales till 9MFY23

Generated positive cash
flow of **Rs.980** million
from operating Activities

Performance highlights

Performance during the quarter

Figures in Q3FY23

Rs.In Million

2,858.92
Total Revenue

199.62
EBITDA

87.36
Net Profit

Figures in 9MFY23

9,909.45
Total Revenue

904.45
EBITDA

545.61
Net Profit

Growth in 9MFY23 Over 9MFY22

2%
Total Revenue

8%
Value

-6%
Volume

Financial highlights

Profit & loss statement

Operational performance

Rs.In Million

	Quarter Ended			Nine Month Ended		
	Q3FY2023	Q3FY2022	YoY %	9MFY2023	9MFY2022	YoY %
Revenue from Operations	2,853.40	3,814.90		9,874.50	9,705.98	
Other Income	5.52	14.98		34.95	27.44	
Total Revenue	2,858.92	3,829.88	-25%	9,909.45	9,733.42	2%
Material Consumed	1,562.43	1,867.55		5,139.47	4,433.00	
Subcontracting Expenses	431.65	642.57		1,602.47	1,869.60	
Gross Profit (Excluding other income)	859.32	1,304.79	-34%	3,132.56	3,403.39	-8%
Gross Profit(%)	30.12%	34.20%		31.72%	35.06%	
Employee Benefit Expenses	188.85	169.59		559.21	452.33	
Other Expenses	476.37	492.14		1,703.85	1,337.79	
EBITDA	199.62	658.03	-70%	904.45	1,640.71	-45%
EBITDA Margin (%)	6.98%	17.18%		9.13%	16.86%	
Depreciation	47.79	42.38		133.76	120.95	
EBIT	151.83	615.65	-75%	770.69	1,519.76	-49%
EBIT Margin (%)	5.31%	16.07%		7.78%	15.61%	
Finance Cost	39.78	19.65		108.18	49.82	
Profit before Tax	112.05	596.00	-81%	662.51	1,469.95	-55%
PBT Margin (%)	3.92%	15.56%		6.69%	15.10%	
Tax	24.69	151.94		116.89	382.31	
Profit After Tax	87.36	444.07	-80%	545.62	1,087.64	-50%
PAT Margin (%)	3.06%	11.59%		5.51%	11.17%	

Financial highlights

Cash Flow Statement

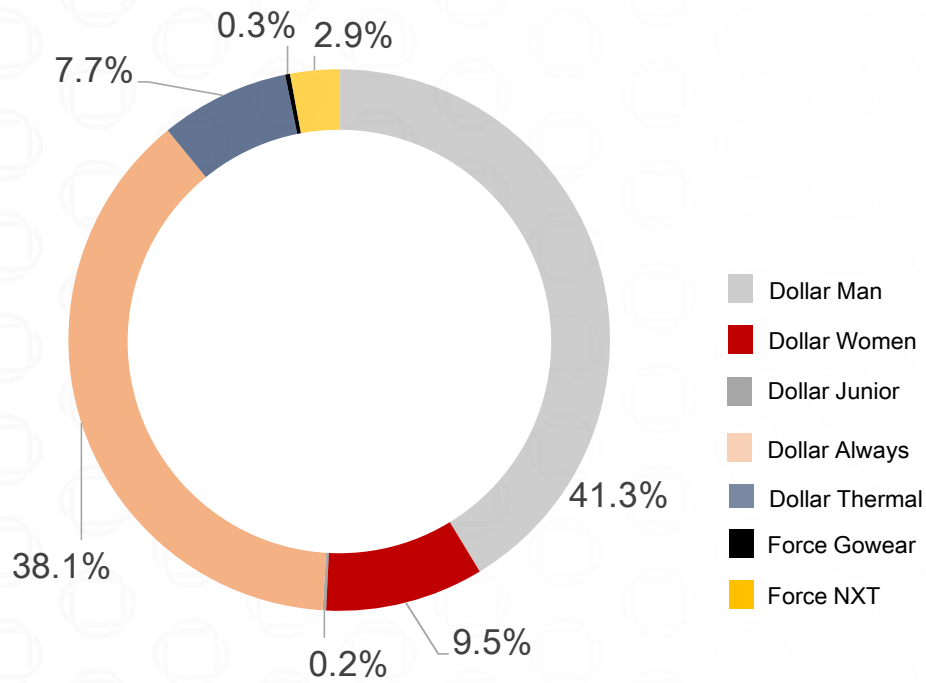
Rs.In Million

Particulars	9MFY 2023	9MFY 2022
Net Profit Before Tax	662.51	1469.95
Adjustment for : Non Cash items/Other Investment or Financial Items	255.74	222.01
Operating profit before Working capital Charges	918.25	1,691.96
Changes in Working capital	369.91	-1,378.34
Cash generated from Operating Activities	1288.16	313.62
Direct taxes paid(net of refund)	308.20	304.39
Net cash from Operating Activities	979.96	9.23
Net cash from Investing Activities	-424.94	-374.55
Net cash from Financing Activities	-554.88	438.37
Net Decrease in Cash and Cash equivalents	0.14	73.06
Add : Cash & Cash equivalents at beginning of the period	2.06	69.69
Cash & Cash equivalents at the end of the period	2.20	142.75

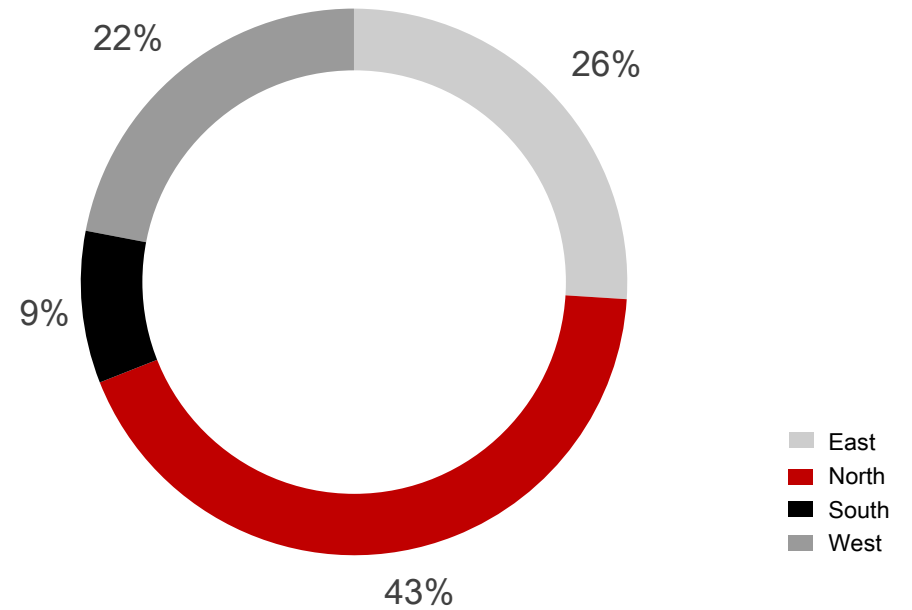
Financial highlights

Revenue contribution 9MFY23

Category wise



Geography wise





GROWTH DRIVERS

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Future-ready

Transformational change

Perceived as a men's innerwear brand



Perceived as a brand for all

Push-based sales model



Replenishment-based sales model

100 retailers per distributors



Active retailers per distributors
150-200 by FY25

4% share of revenue



Share of revenue from modern retail
8% by FY25

6 warehouses across Kolkata



Integrated warehouse by FY23

Rs 1356.85 crore revenue in FY22



Rs. 2,000 crore revenue by FY25

203 distributors up to 9MFY23



Distributors under Project Lakshya
~70% by FY25

245 distributors up to 9MFY23



Distributors under channel financing
~60% by FY25

Capacity expansions

Improving our capabilities for higher profitability

Integrated warehouse

Investments towards an integrated warehouse in West Bengal

Advantages:

- Improved operational efficiencies
- Cost savings on rent and overheads of multiple warehouses
- Significant reduction of waste and damage
- Better controls over inventory, productivity, quality and efficiency
- Catalysing Project Lakshya distribution expansion and related ERP initiatives

Rs.50 crore

Envisaged investments

March 2023

Expected commissioning

Expansion of spinning capacity

Increasing our spinning capacity from 22,000 spindles to 42,000 spindles

Advantages:

- Mitigation of irregular supply of yarn through increased production
- Maintaining quality of yarn
- Ensuring no stock outs within the company or with dealers and distributors
- Enabling us to provide quality products at reasonable prices
- Increase of in-house yarn capacity from 400 TPM to 600-700 TPM

Rs.65 crore

Envisaged investments

May 2023

Expected commissioning

Omni-channel

Pursing growth through EBO



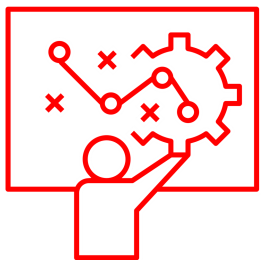
We successfully forayed into the exclusive brand outlet (EBO) segment

Launched 12 EBOs, two each in Delhi, Madhya Pradesh & Punjab One each in UP, Rajasthan, Maharashtra, Gujarat, Haryana & Odisha.

EBO set up under the FOFO model (Franchise-owned franchise-operated)

125

Targeted EBOs by 2025



STRATEGY

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Achieving through our strategic priorities

Strategic priorities



Leveraging new brand overhaul



Investing in digitisation



Growth through Project Lakshya



Partnering for growth



Brand evolution

Changing with the evolving times



2010

Actor Akshay Kumar came on board as brand ambassador. The revamped identity was truly Fit Hai Boss!



2020

The Mnemonic D stands for Dollar, for Dynamism and for the Determination to be a part of every millennial India closet



2005

Dollar hit the airwaves with actor Salman Khan and the identity became an instant hit



1990

The original logo underwent changes to address the demands of an open market economy



1972

Mr. Dindayal Gupta, the founding Chairman, started Dollar in a busy corner of Kolkata

Aligned with the evolving needs of the consumers, Dollar has continuously reinvented itself, shaping its ambition of becoming a brand of choice for its consumers

Branding

Changing the brand architecture



BIGBOSS



ULTRA



J-CLASS



WINTERCARE



MISSY



LEHAR



CHAMPION



ATHLEISURE

Why?

To change the perception that Dollar is just a men's innerwear brand

8%

Share of non-men's innerwear revenue in FY22

10%

Share of non-men's innerwear revenue in FY25

What are we doing?

- 5 categories created – MAN, WOMAN, JUNIOR, ALWAYS, THERMALS
- Akshay Kumar as our brand ambassador for Dollar man
- Signed Yami Gautam as our brand ambassador for Dollar Women
- Redesigned our logo to enhance connect with the consumers

Outcomes

- We have been able to significantly enhance our brand recall through our dedicated branding initiatives.
- We now address the needs of a huge consumer spectrum through differentiated price categories: premium, mass premium and economy
- We seamlessly connect with the millennials and cater to their needs

Branding

Catalyst for the athleisure segment



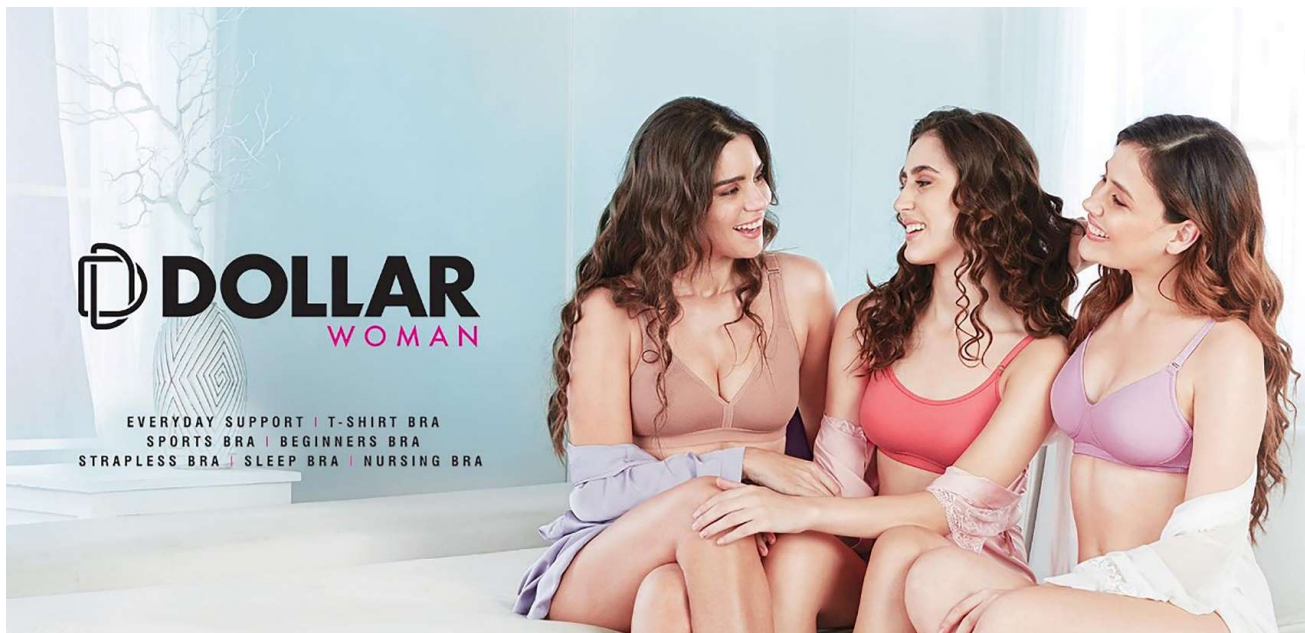
Dollar is the principal sponsor of Rajasthan Royals for the 15th edition of the Indian Premier League

“Rajasthan Royals, which won the maiden edition of IPL and is one of the most popular IPL franchises and an extremely competitive team with marquee national and international players representing them. Our association with Rajasthan Royals will allow us to leverage our brand -athleisure-nationally. Rajasthan also happens to be a key market for Dollar over the years. With the athleisure segment growing exponentially since the pandemic and contributing significantly towards enhancing the market share of our company, we are confident that this association will benefit the brand to a major extent.”

Vinod Kumar Gupta
Managing Director

Branding

Diversifying our portfolio in the women's segment



Dollar Woman Brassiere Launch

“A woman is born equal; she deserves to be treated as an equal. It’s time to change, time to acknowledge her rightful place in life. She is born free, it’s time for her to break free.

‘Dollar Woman’ celebrates the freedom of spirit every woman deserves with its newly launched lingerie line with a varied range of products like Everyday Bra, T-shirt Bra, Sports Bra, Beginners Bra, Strapless Bra, Sleep Bra, Nursing Bra.

Project Lakshya

Project Lakshya Updates

203

Distributors added until 9MFY23

14

Distributors added in Q3FY23

17%

Share of Revenue of Domestic Sales until 9MFY23

2 new states

Tamil Nadu & Kerala in planning Stage

What are we doing?

- Mapping retail network in area allocated to distributor
- Enrolling retailers into Project Lakshya
- Supply to distributors under the replenishment model

Why?

To reinvent the entire distribution mode and transition from a push model to a replenishment based model

Outcomes

- Increased market penetration
- Increased primary sales and secondary sales
- Faster recovery of dues in retail



Digitalisation

Integrating digitalisation to increase efficiencies

Why?

To integrate digitalisation in our daily operations to increase efficiencies

What are we doing?

- Integrating Auto Replenishment System (ARS) and Distributor Management Systems for our Lakshya distributors
- In the process of implementing ARS at the supply chain level
- Implementing an after sales service app at the retail level and activity tracker for the sales team
- In process of transitioning from Oracle ERP to SAP
- Integrating automated tele calling for our tele-callers

Outcomes

- Transparent engagements with retailers
- Deeper insights about on-ground realities
- Increased productivity and efficiencies

Partnership

Strategic partnership for sustainable growth



Joint Venture with G.O.A.T

1. We entered into a 51-49 JV with G.O.A.T Brands Lab Pte for Pepe Jeans Innerfashion Pvt. Ltd.
2. G.O.A.T Brands Lab Pte acquired 50% stake of Pepe and additional 2% non-voting equity
3. Multi-brand distributor for men, women and kids' undergarments under athleisure, sportswear, lingerie, leisure wear, sleepwear, lounge wear made of natural fibres and MMF
4. Would undertake business operations in the regions of India, Sri Lanka, Bhutan, Nepal and Bangladesh

Expected outcomes

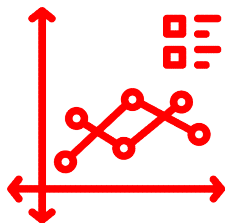
1. Opportunity to widen our supply of finished goods directly to end consumers through D2C channels.
2. Go for in-organic growth or brand acquisition.
3. Set a foot mark in Super Premium brands

Partnerships



Appointment of New CEO for Pepe Jeans Inner Fashion

Rishi Mohindru comes with more than 20 years of experience across blue chip firms. In his last role he was working with Tomorrow Capital - A Venture capital fund based out of Mumbai where he assisted multiple firms in their Go To Market strategy and in setting up their sales teams. At Tomorrow capital he worked with a proptech, an edtech and a fintech firm. He will be responsible for the next wave of profitable growth of Pepe Inner Fashion across its multiple channels in India and its neighbouring regions. With the launch of the new website pepeinner.com, he will not only concentrate on current business but D2C penetration for the brand. He will oversee the expansion of new product categories across men, women and kids.



ANNUAL FINANCIAL HIGHLIGHTS

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Financial highlights

Profit & loss statement

Operational performance

`Rs In Million

	FY2022	FY2021	Y-O-Y(%)
Revenue from Operations	13,503.20	10,369.50	30%
Other Income	65.30	34.80	
Total Revenue	13,568.50	10,404.30	30%
Material Consumed	6,146.30	4,452.80	
Subcontracting Expenses	2,687.30	2,107.70	
Gross Profit (Excluding other income)	4,669.60	3,809.00	23%
Gross Profit(%)	34.58%	36.73%	-6%
Employee Benefit Expenses	639.50	446.30	
Other Expenses	1,863.00	1,981.90	
EBITDA	2,232.40	1,415.60	58%
EBITDA Margin (%)	16.45%	13.61%	21%
Depreciation	165.80	154.70	
EBIT	2,066.60	1,260.90	64%
EBIT Margin (%)	15.23%	12.12%	26%
Finance Cost	96.20	87.90	
Profit before Tax	1,970.40	1,173.00	68%
PBT Margin (%)	14.52%	11.27%	29%
Tax	511.70	300.20	
Profit After Tax	1,458.70	872.80	67%
PAT Margin (%)	10.75%	8.39%	28%

Financial highlights

Balance sheet

Particulars	Rs In Million	
	FY 2022	FY 2021
A. Assets		
1. Total Non Current Assets	1,737.90	1,206.40
2. Total Current Assets	9,418.40	7,226.60
a) Inventory	4,752.10	3,339.50
b) Trade receivables	4,020.80	3,309.20
c) Other financial Assets	30.70	94.60
d) Other Assets	614.80	483.30
Total Assets	11,156.30	8,433.00
B. Equity & Liabilities		
1. Equity	6,758.20	5,428.10
a) Equity Share Capital	113.40	113.40
b) Other Equity	6,644.80	5,314.70
Liabilities		
2. Non Current liabilities	111.10	95.40
3. Current Liabilities	4,287.00	2,909.50
a) Borrowings	2,049.70	1,217.20
b) Trade payables	1,761.10	1,385.10
c) Other financial liabilities	352.50	271.90
d) Other Liabilities	123.70	35.30
Total Equity & Liabilities	11,156.30	8,433.00

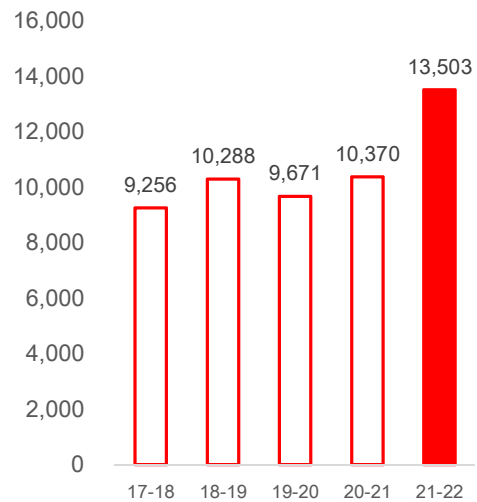
Financial highlights

Performance track record

5-year KPIs

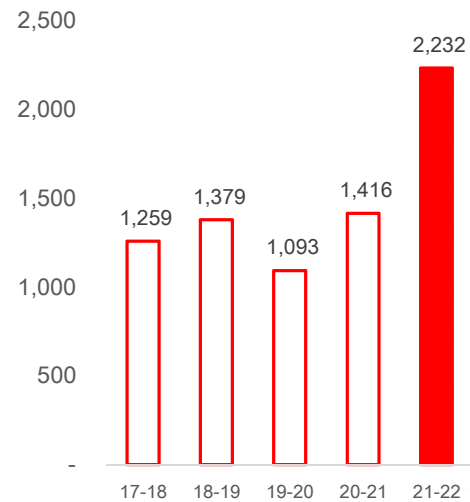
Revenue

Rs In Million



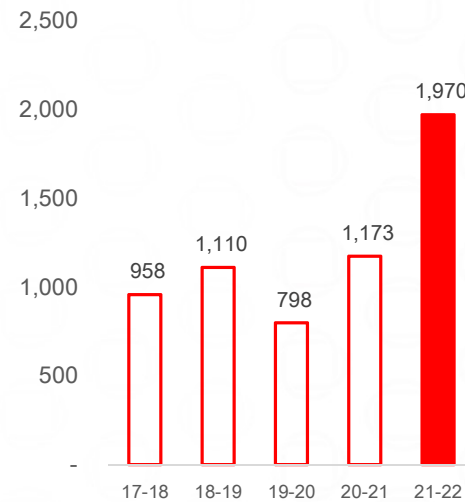
EBITDA

Rs In Million



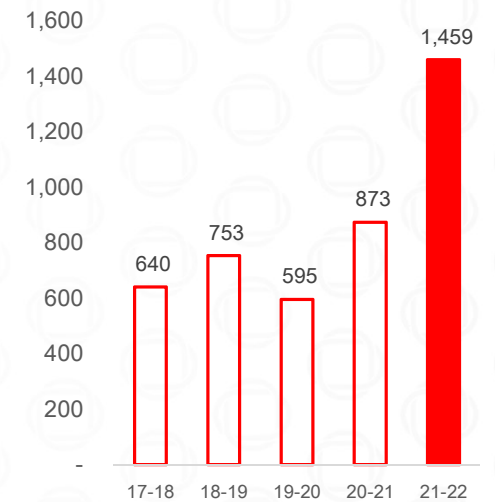
PBT

Rs In Million



PAT

Rs In Million



Financial highlights

Performance track record

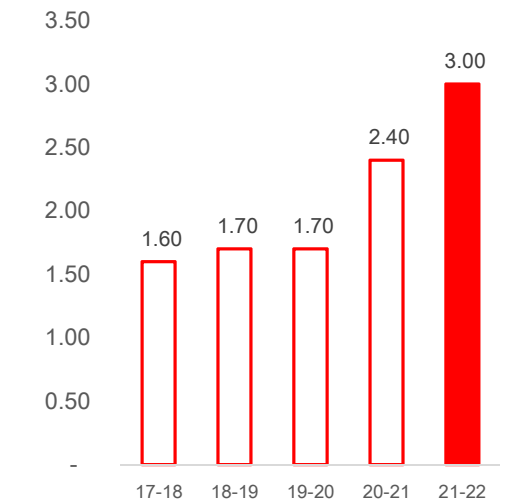
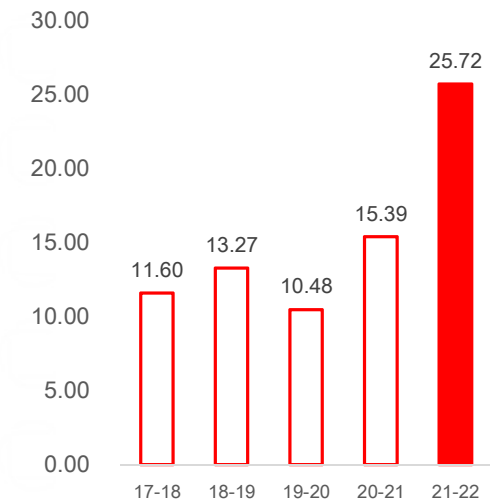
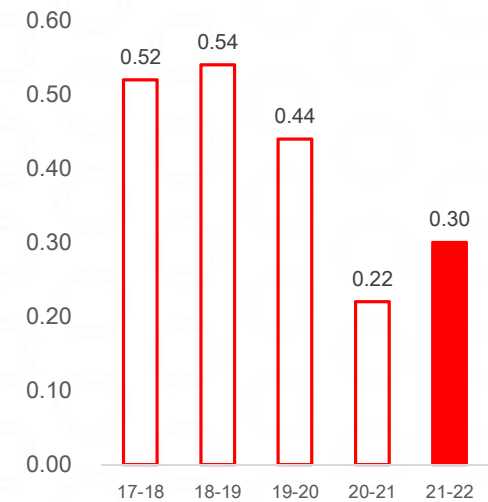
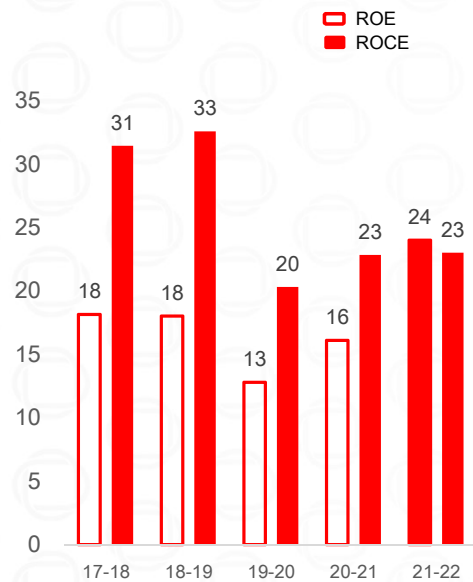
5-year KPIs

ROE & ROCE (%)

Debt-equity Ratio (x)

EPS (Rs)

DPS (Rs)



Financial snapshot

Backed by improving working capital



Strengthening working capital cycle



Improving Balance Sheet health by reducing gearing



Expanding business with focus on newer segments and premiumisation

(days)	FY22	FY21	FY20
Debtor turnover	99	121	134
Inventory cycle	109	112	119
Creditor cycle	54	55	60
Interest cover (x)	23.20	16.11	23.20
Debt-equity (x)	0.30	0.22	0.44

24 days

Decrease in working capital days

24%

ROE

23%

ROCE

15%

Return on assets





ESG AT DOLLAR

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Environment

Contributing towards a greener future

Solar power

75 lakh units/year

Power generation capacity of the solar power plant in Tirupur

4 MW

Total power generation capacity commissioned

Wind power

70 lakh units

Total power generated annually

4.95 MW

Total power generation capacity of our four windmills

Zero liquid discharge

13.5 tonnes

Daily production capacity of our effluent treatment plant

1000 KL

Zero liquid discharge capacity with multiple evaporators



Social



Empowering our biggest asset

Employee-centricity



Employee engagement

Engaging with our employees on a daily basis to address their grievances



Skill development

Conducting regular on-the-job and off-the-job training sessions to upskill our employees



Women empowerment

Working towards reducing the gender gap and creating a safe working environment



Diversity and inclusion

Implementing anti-harassment and anti-discrimination policies across all verticals of our Company

Social

Being a responsible corporate



Donated ~Rs 72 lakhs to schools in UP, Rajasthan, Chhattisgarh and Odisha, to ensure underprivileged children have access to quality education



Donated ~Rs 44 lakhs to various hospitals in Bengal for upgradation of medical facilities and equipment



Installed water huts and kiosks across the states of Delhi NCR, Odisha, Rajasthan, Uttar Pradesh and Tamil Nadu, among others



Donated sanitary napkins to the underprivileged women residing in the slums of Kolkata and girl schools

Governance

Strengths that drive



Diverse and experienced Board of Directors



75% members of the Audit Committee consist of Independent Directors



Promoters possess >3 decades of experience



All members of the Nomination & Remuneration Committee are Independent Directors



Independent Director account for 50%



We have one Woman Independent Director on our Board

Highlights

- Appointed Link Intime India Pvt Ltd as consultant for ESOP
- Reappointed Singhi & Co. as a statutory auditor of the Company

Leadership team

Guided by experienced Directors



Mr. Vinod Kumar Gupta
Managing Director



Mr. Binay Kumar Gupta
Managing Director



Mr. Krishan Kumar Gupta
Whole-time Director



Mr. Bajrang Kumar Gupta
Whole-time Director



Mr. Gopal Krishnan Sarankapani
Whole-time Director



Mr. Rajesh Kumar Bubna
Independent Director



Mr. Binay Kumar Agarwal
Independent Director



Mr. Sandip Kumar Kejriwal
Independent Director



Mr. Srikumar Bandyopadhyay
Independent Director



Mrs. Divya Newatia
Independent Director

Management team

Supported by a experienced team



Mr. Ankit Gupta
President, Marketing



Mr. Gaurav Gupta
Vice-president, Strategy



Mr. Aayush Gupta
Vice-president, Sales



Mr. Ajay Kumar Patodia
Chief Financial Officer



Ms. Mamta Jain
Company Secretary



Mr. Shantanu Banerjee
General Manager – Marcom
and Branding



Mr. Sanjay Srivastava
General Manager –
Sales



Mr. Vedpal Verma
General Manager –
Fabric Division



Mr. Krishna Kumar Soni
General Manager – Spinning
Division

Awards and accolades

Being recognised for our efforts



2021
INDIA'S most
admirable brand
by THE BRAND
STORY



2018
Company of the
Year-Textile

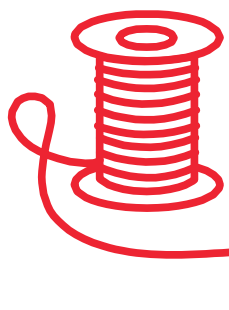
Zee Business Dare
to Dream Awards



2019
" Best in Men's
Hosiery "
TIMES BUSINESS
AWARD



2019
ET's Most
promising brand
Award



COMPANY OVERVIEW

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Dollar at a glance

A leading player in branded outerwear and innerwear

Established in 1972, we have been able to solidify our presence as one of the leading players in the Indian hosiery space.

~210 million

Garment manufacturing
capacity (pieces)

15%

Market share in the
Indian hosiery space

2000+

Products across all
segments of presence

15+ countries

Export presence

04

Manufacturing units

1500+

Strong Pan-India
dealer network

900+

Presence across
large format stores



Ethos

Vision, mission and values



Our Vision

Dollar in everyone's lives.

Medium-term vision: We aspire to metamorphise the Company into an aspirational brand by offering premium and super premium products

Long-term vision: To emerge as a complete brand and distribution company present across multiple categories of fashion wear – from garments to innerwear.



Our Mission

- To emerge as India's leading and most-loved innerwear brand
- To make fashionable yet affordable outerwear and innerwear
- To provide our customers with a higher standard of apparel
- To reach out to customers conveniently (modern trade and e-commerce)
- To outperform industry standards in terms of quality of earnings
- To enhance the lives of people centred around Dollar
- To achieve high governance standards

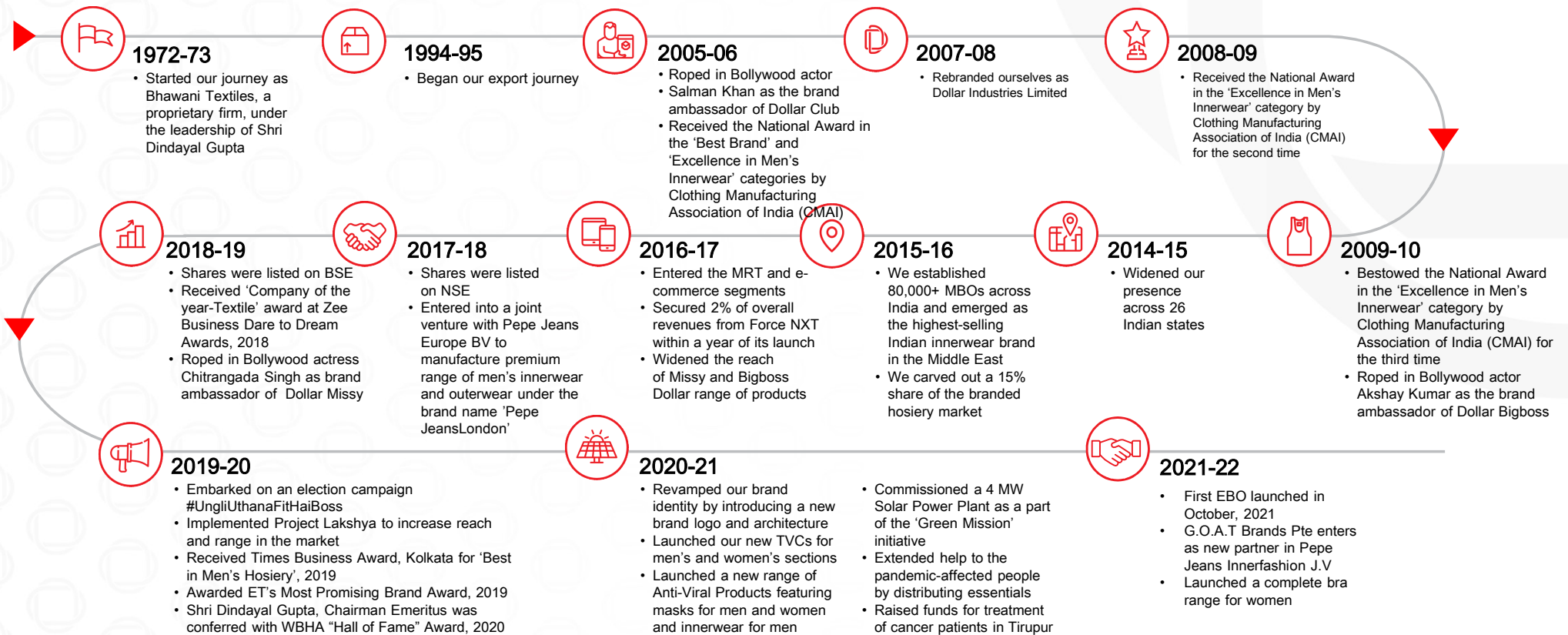


Core Values

- Insights and constant innovation are a way for Dollar. We also add value to the Dollar experience so as to keep it more vibrant and relevant
- The benchmark for Dollar's success is customer satisfaction.
- Dollar delights its customers through a range of products that not only deliver comfort, but are constantly upgraded to keep the styling in line with the latest trends
- Business integrity is the way of life at Dollar. The Company is proud to stand by integrity and transparency in all its dealings and ensures adherence to highest standards of business ethics
- At Dollar, we value time and its optimum utilisation for timely decision making.

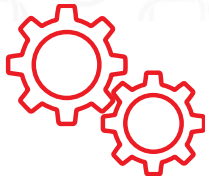
Milestones

Mapping our progress over 50 years



Strengths

Leveraging our strengths to penetrate deeper into affordable branded hosiery market



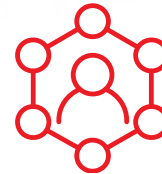
Integrated operations

Integrated value chain



Wide reach

Channel expansion & Omni Channel strategy



Multi-brand portfolio covering wider user base

Increasing share of non-male users



Favourable financial positioning

Continuously strengthening financials

Value chain

Edging past competition with integrated value chain

2.5 Million

metres per month
Captive elastic
production capacity

400 tonnes

Average monthly
output of Ne 20s to
40s single yarn

400 tonnes

Monthly installed capacity
of bleaching and dyeing

0.3 Million

pieces per day Captive
cutting capacity

300 tonnes

Monthly captive
knitting capacity

Manufacturing facilities:



- Kolkata
- Ludhiana
- Tirupur
- Delhi



Presence

Widening footprint to cater to the wide population

Sales Team 500+	Dealer network 1500+	Retail reach 1,20,000+	
EBOs 12	Branches 14	Depots 15	Warehouses 20+

Multi-platform

E-retail presence **Flipkart** **Myntra** **snapdeal** **AJIO** **amazon**

Modern trade **BRAND FACTORY** **VISHAL MEGA MART** **spencer's** **TRENDS**



Expanding global reach

Penetrating more countries across the world

Export revenue in FY22

15+ | **10%**
Countries

Export revenue in FY25

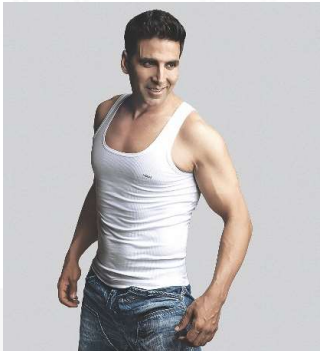
30 | **11%**
Countries



Where we export			
1. UAE	5. Bahrain	9. Myanmar	13. Georgia
2. Oman	6. Yemen	10. Nigeria	14. Sri Lanka
3. Qatar	7. Iraq	11. Jordan	15. Somalia
4. Kuwait	8. Nepal	12. Bangladesh	16. Thailand

Brands

Dollar for all



Dollar Man

Big boss | J-Class | Athleisure

Vests, Briefs, Trunks, Gym vests, Socks, Tank tops, Crew necks, Polos, Henley, Bermudas, Capri, Track pants, Joggers



Dollar Woman

Missy

Leg wears, Casual wear, Bra Camisoles, Panties, Socks



Dollar Junior

Champion

T-shirts, Bermudas, Trousers, Socks



Dollar Always

Lehar

Vests, Briefs, Trunks, Panties, Socks, Camisoles



Dollar Thermals

Ultra | Wintercare

Thermal v-necks, Thermal trousers, Long camisoles, Short camisoles, Socks



FORCE GO WEAR

RKG®

Club®

Standalone Brands

- Force Nxt
- Force Gowear
- RKG
- Club

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Thank you

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