

December 11, 2019

To,
Dept. of Corporate Services (CRD)
BSE Limited
Phiroze Jeejeebhoy Towers,
Dalal Street, Mumbai – 400 001

Scrip Codes:
Equity: 540798
Debt: 958280, 958281

Dear Sir / Madam,

Sub: Presentation to Analysts/ Media

Please find enclosed herewith a presentation made during the Analysts meet/ Media event held on December 11, 2019 at Mumbai.

Please also take note that the said presentation shall also be available on Company's website at www.futuresupplychains.com

Kindly take the above information on your records.

Thanking you,

Yours faithfully,
For Future Supply Chain Solutions Limited


Vimal Dhruve
Company Secretary



To,
Listing Department
The National Stock Exchange of India Limited
Bandra Kurla Complex,
Bandra East,
Mumbai – 400 051

Scrip Symbol: FSC



Science of Supply Chain. **DELIVERED**

Future Supply Chain Solutions Limited



FSC –NE Joint Press Conference
December 11, 2019



India to be amongst the fastest growing economies; Growth in manufacturing and consumption demand driving the need for logistics service



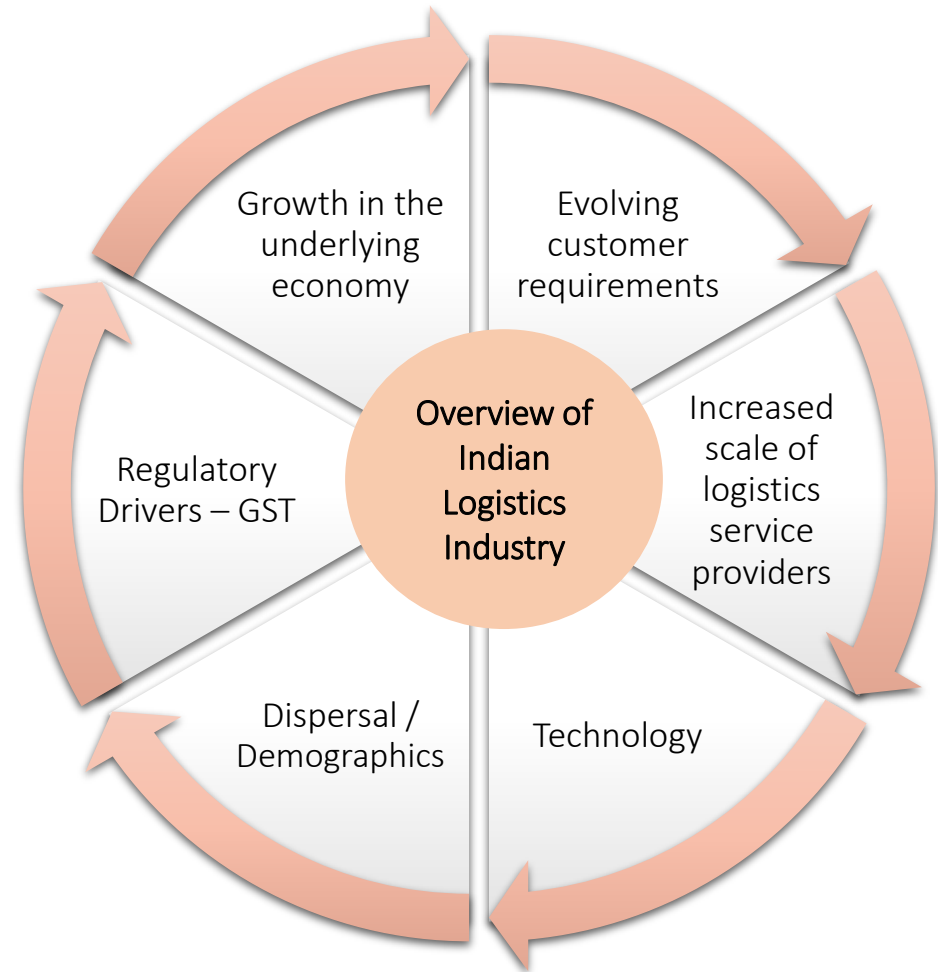
Opportunity to optimize logistics spend as industry is 2x less efficient than US and China; Unorganized participants constitute ~85% of the logistics demand



GST expected to improve performance of all logistics sub sectors; GST likely to create multiple opportunities



Organizations are increasingly focusing on their core competencies, while outsourcing crucial and complex operations, such as IT and Supply Chain.



Indian Logistics Industry Size: Significant Growth Opportunity

FY22

24,400



20,000



3,600



48,000

FY17

11,000



10,000



1,400



22,400

**Contract
Logistics**

**Express
Logistics**

**Cold
Chain**

**Addressable
Market**

All figures in INR Crore

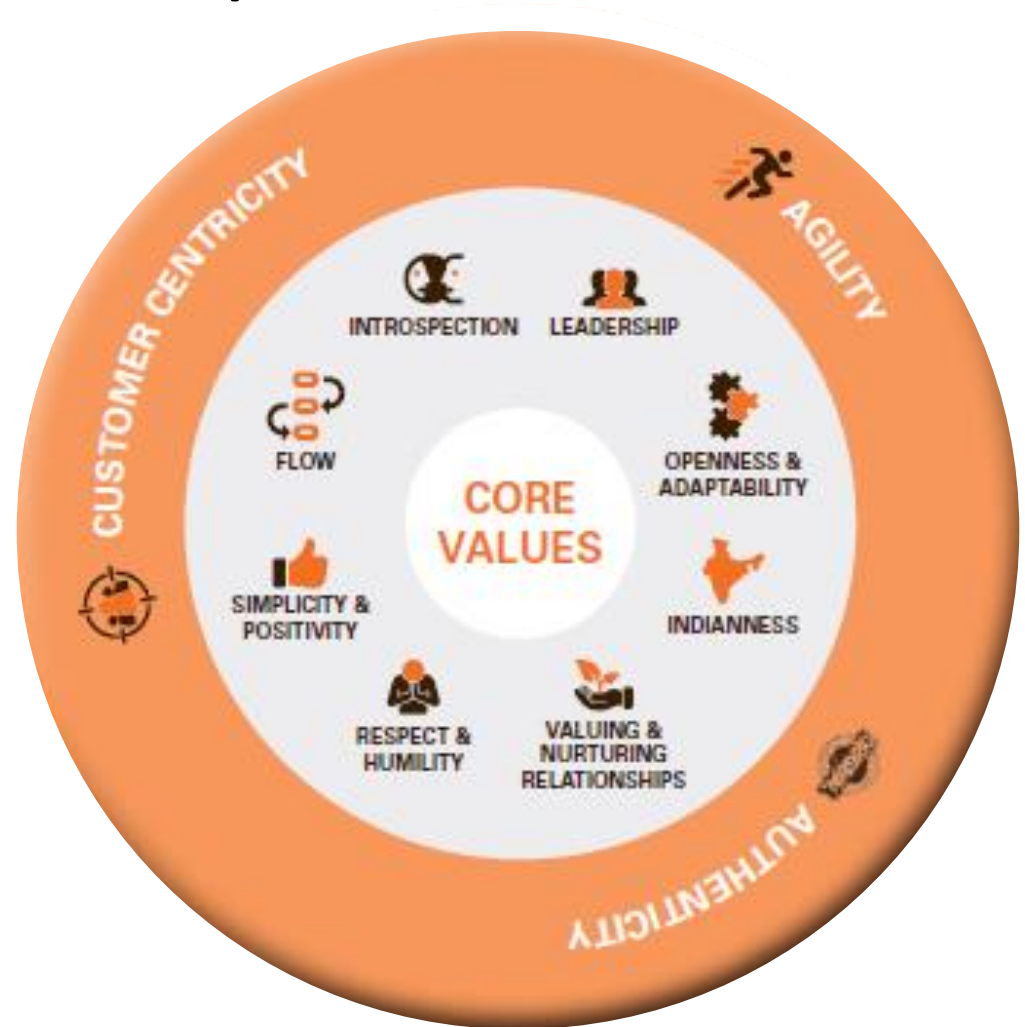
FSC's Target Segments Expected To Grow at 15-20% CAGR

PURPOSE

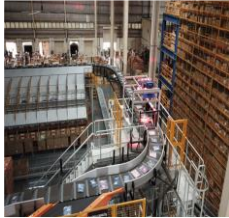
We **add velocity** to our customers' aspirations.

VISION

To be a **₹ 10,000 crore** company by partnering with **consumer-facing businesses** offering them **agile, reliable and integrated** supply chain solutions through our **world-class, technology-enabled infrastructure**.



Integrated Service Offering



Contract Logistics

Warehousing, distribution and value-added services



Express Logistics

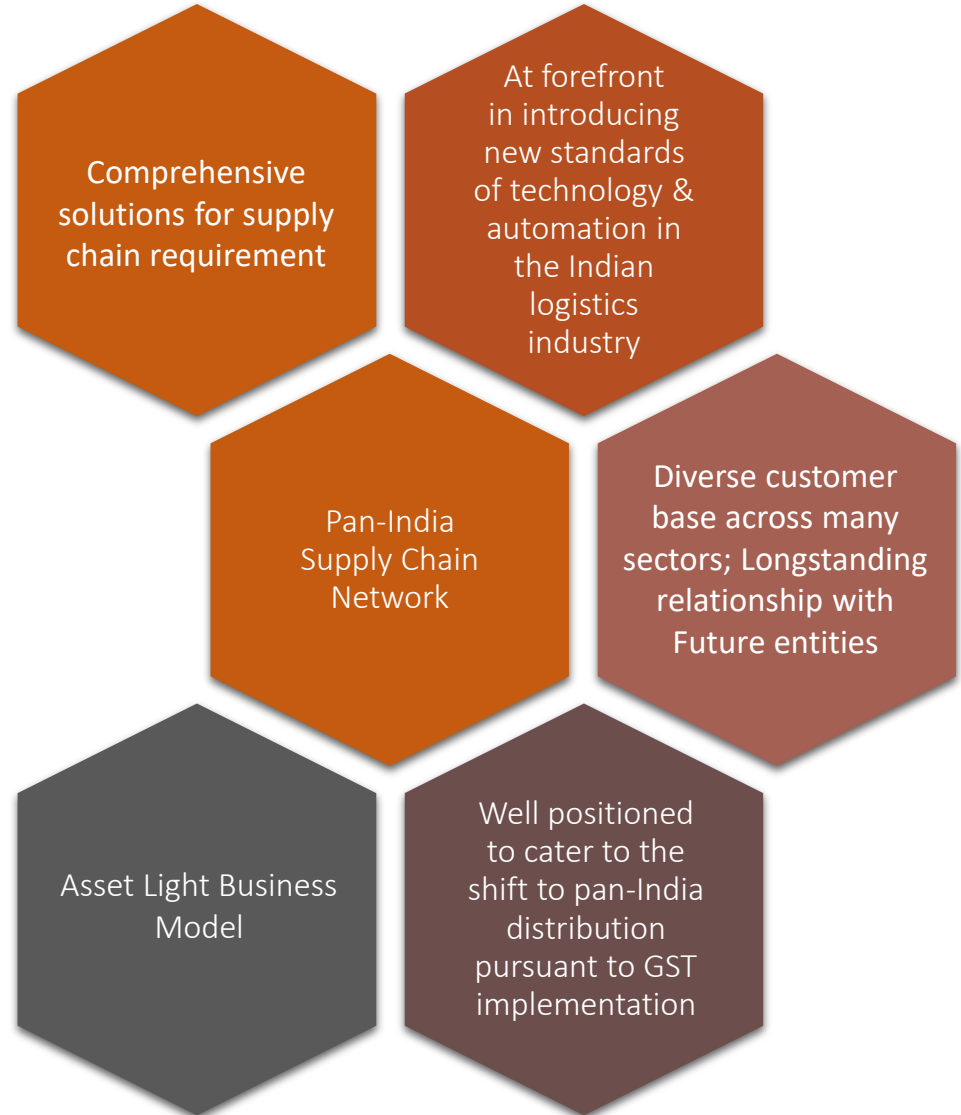
Point-to-point, full and part truck-load, time-definite transportation services



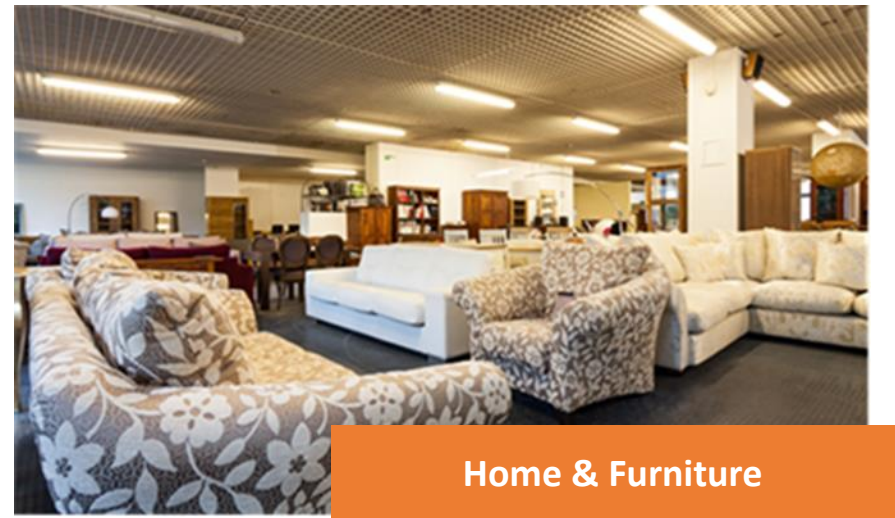
Temperature Controlled

Cold-chain warehousing & transportation for perishable products

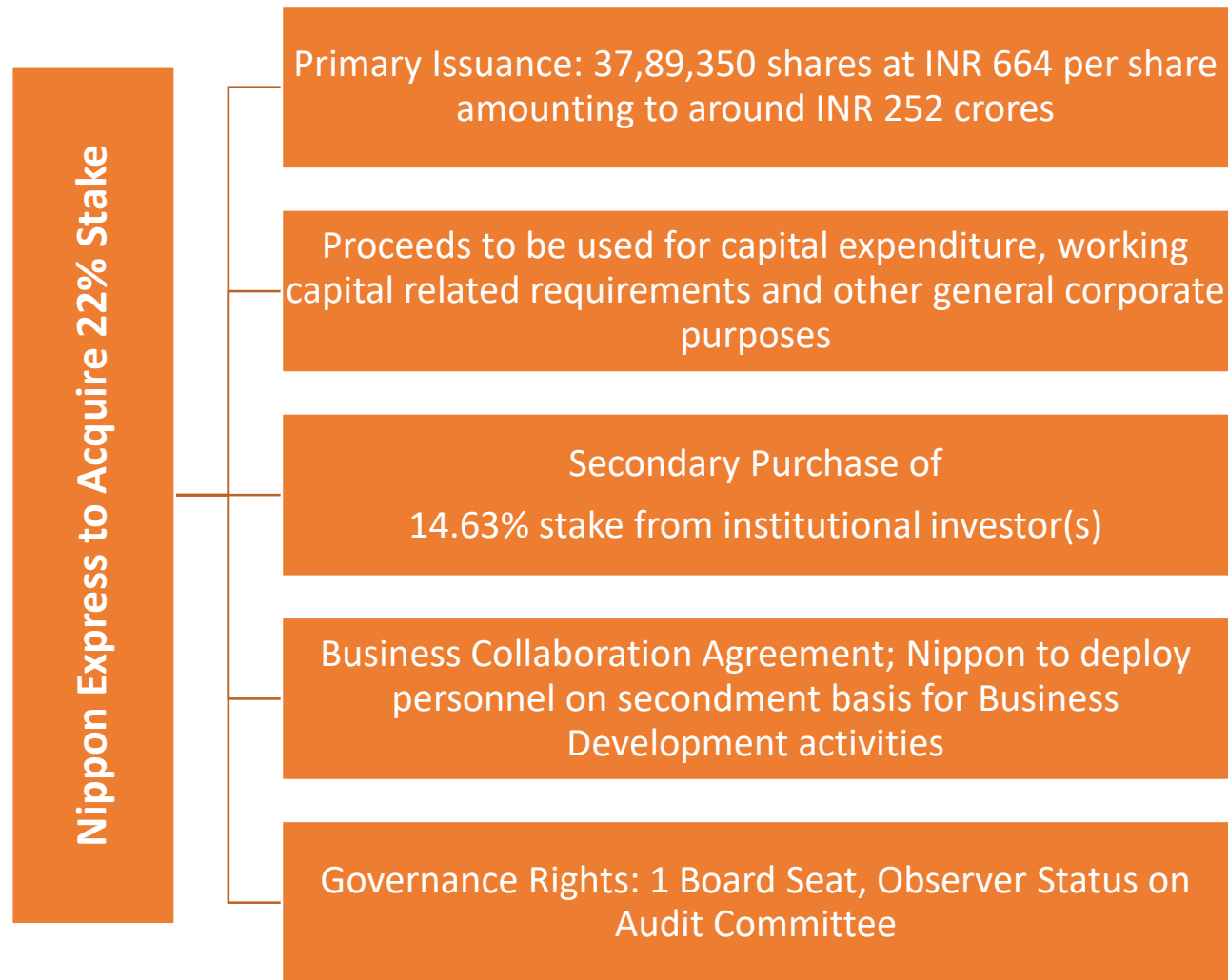
Amongst India's largest organized third-party logistics operators



Strong Presence in Fast Growing Consumption Sectors



85-90% of the business is driven by the consumption-driven sectors.



Transaction has received all necessary approvals including Competition Commission of India, Stock Exchanges in India and FSC Shareholders



Let's aspire to become India's leading logistics player, capturing opportunities arising from remarkable growth in the Indian logistics industry

The background of the image consists of a dense, repeating pattern of thin, brown, wavy lines that create a textured, wood-grain-like effect. The lines are oriented diagonally, sloping upwards from left to right. The overall color palette is a range of brown tones, from a dark chocolate brown to a lighter, more ashy brown.

NAMASTE