



August 11, 2022

The Secretary
Corporate Relationship Dept.
The Bombay Stock Exchange
1st Floor, New Trading Ring
Rotunda Building
Phiroze Jeejeebhoy Towers
Dalal Street, Mumbai – 400 001

The Secretary
National Stock Exchange of India
Limited
Exchange Plaza
Bandra Kurla Complex
Mumbai – 400 051

Dear Sir,

Sub: Press Release & Investor Presentation - Reg

We herewith enclosed the Press Release and Investor Presentation for the Quarter ended 30 June 2022.

This is for your information and records.

Thanking you,

Yours truly,
For Page Industries Limited

Murugesh C
Company Secretary

Encl: as above



PAGE INDUSTRIES LIMITED

Head Office : 3rd Floor, Umiya Business Bay-Tower-1, Cessna Business Park, Varthur Hobli, Outer Ring Road, Bengaluru - 560 103. Ph: 91-80-4946 4646.

Corporate & Registered Office : 7th Floor, Umiya Business Bay-Tower-1, Cessna Business Park, Varthur Hobli, Outer Ring Road, Bengaluru - 560 103.
Ph: 91-80-4945 4545 | www.jockeyindia.com | info@jockeyindia.com | CIN # L18101KA1994PLC016554



Press Release

For Immediate Dissemination

Page Industries announces all-time high revenue & PAT with Q1FY23 results

Bengaluru, India 11 August 2022: Page Industries, India's leading apparel manufacturer, today announced its financial results for the quarter ended 30th June 2022.

Financial Highlights for Q1FY23

- Revenue at Rs. 13,413 million, up 167 % YoY and 21% QoQ.
- EBITDA at Rs. 2,978 million, margins at 22.2 %, up 771% YoY and 11% QoQ, with operating efficiencies.
- Reported Profit After Tax at Rs. 2,070 million; up 1791 % YoY and 9% QoQ.
- PAT margin at 15.4 %, compares with 2.2% YoY and 17.1% QoQ.
- Cash and cash equivalents at Rs. 3,144 million up from 2,835 million at Q4 FY22, liquidity continues to remain strong with robust cash flow management.

Commenting on the results, Managing Director Mr. V.S. Ganesh said, *“Riding on the back of strong sales performance and robust financial planning, despite external challenges, we have successfully delivered yet another milestone performance this quarter. I am happy to report that we are well poised with a clear vision for sustainable growth through delivering affordable premium apparel to our customers. Our roadmap of capacity augmentation and retail expansion will lead us to this vision and continue this momentum. We have also significantly invested in our people.*

We remain optimistic of the thriving market for our products and by banking on our pillars of quality, cost, product design and customer outreach, we will continue to deliver a wide range of premium products to our customers. Our strategy of introducing kids wear across exclusive womenswear stores has shown good results and we are confident of making inroads into this nascent and fast growing segment. Today, tier 2 and 3 centres are also becoming an important marketplace for us given the increased awareness of healthier lifestyle and availability of quality, functional innerwear and athleisurewear. This is in line with our retail expansion strategy across existing and new domestic and international markets. On a closing note, I acknowledge Mr. Genomal's guidance which ensured a smooth leadership transition and helped me settle in this role.”

Page Industries Limited

Registered Office: Cessna Business Park, Tower-1,
7th Floor, Umiya BusinessBay, Varthur Hobli, Outer Ring Road, Bengaluru, 560103
Tel: 080 - 4945 4545 | CIN: L18101KA1994PLC016554



About Page Industries Limited

Page Industries is the exclusive licensee of JOCKEY International Inc. (USA) for manufacture, distribution and marketing of the JOCKEY® brand in India, Sri Lanka, Bangladesh, Nepal, Oman, Qatar, Maldives, Bhutan and UAE. Page Industries is also the exclusive licensee of Speedo International Ltd. for the manufacture, marketing and distribution of the Speedo brand in India.

Jockey is the company's flagship brand and a market leader in the premium innerwear and leisure wear category. The brand is distributed in 2,852+ cities & towns and available in 113,715+ Multi Brand Outlets, 1,144+ Exclusive Brand Outlets (EBO) with extensive presence in 3,026+ Large Format Stores, as also online. Speedo brand is available in 1,074+ stores, 28+ EBOs and 10+ Large Format Stores, spread across 90+ cities.

For further information, please visit www.jockeyindia.com

Investor Contact – investors@jockeyindia.com

Disclaimer: *Certain statements that may be made or discussed in this release may be forward-looking statements and/or based on management's current expectations and beliefs concerning future developments and their potential effects upon Page Industries and its associates. The forward-looking statements are not a guarantee of future performance and involve risks and uncertainties and there are important factors that could cause actual results to differ, possibly materially, from expectations reflected in such forward-looking statements. Page Industries does not intend, and is under no obligation, to update any forward-looking statement made in this release.*



PERFORMANCE HIGHLIGHTS Q1FY23



PAGE INDUSTRIES LIMITED

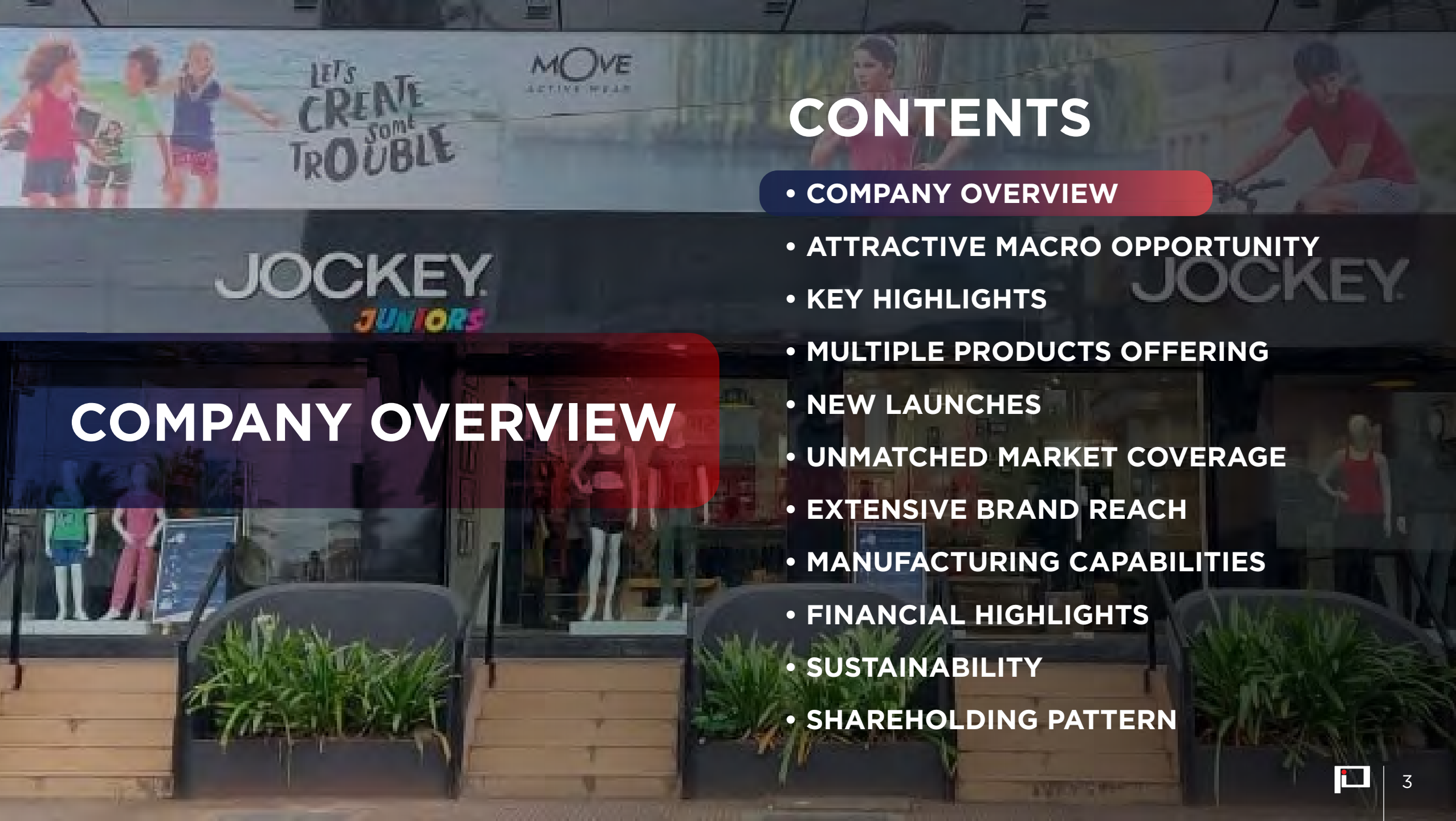
AUGUST 11, 2022

SAFE HARBOUR STATEMENT

This presentation, by Page Industries Limited (the “Company”), has been prepared solely for information purposes and does not constitute any offer, recommendation or invitation to purchase or subscribe for any securities.

This Presentation has been prepared by the Company based on information and data which the Company considers reliable, but the Company makes no representation or warranty, express or implied, whatsoever of the contents of this Presentation. This Presentation may not be all inclusive and may not contain all of the information that you may consider relevant. Any liability in respect of the contents of, or any omission from, this Presentation is expressly excluded.

This presentation updated as on August 11, 2022 may contain certain forward-looking statements concerning the Company’s future business prospects and business profitability, which are subject to a number of risks and uncertainties and the actual results could materially differ from those in such forward-looking statements. The risks and uncertainties relating to these statements include, but are not limited to, risks and uncertainties regarding fluctuations in earnings, our ability to manage growth, competition, economic growth in our markets, ability to attract and retain highly skilled professionals, our ability to manage our operations, government policies and actions, interest and other fiscal costs generally prevailing in the economy. The Company does not undertake to make any announcement in case any of these forward-looking statements become materially incorrect in future or update any forward-looking statements made from time to time by or on behalf of the Company.



LET'S
CREATE
SOME
TROUBLE

MOVE
ACTIVE WEAR

JOCKEY
JUNIORS

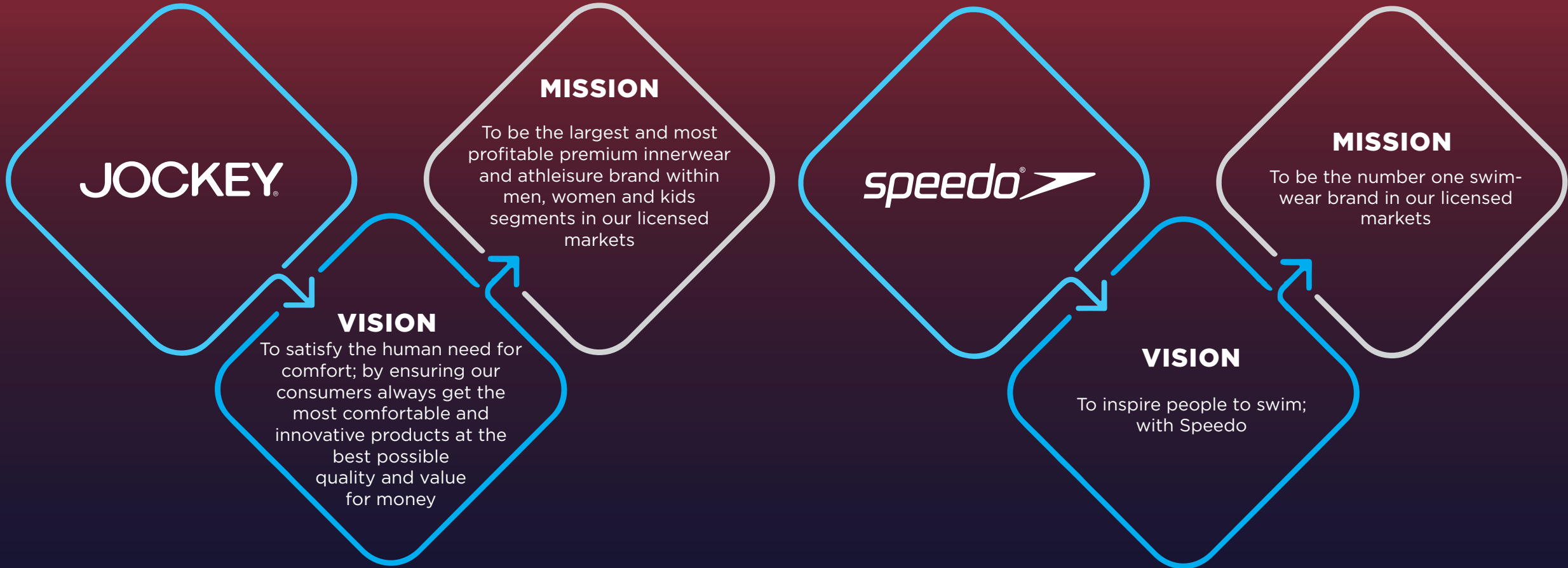
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COMPANY OVERVIEW



PAGE INDUSTRIES: VISION & MISSION STATEMENT



PAGE INDUSTRIES: AT A GLANCE



Leading player in Premium Innerwear and Athleisure market



Highly Experienced Professional Management supported by
28,582 Employees
81% Women Employees



Production Capacity
260 mn pieces
15 manufacturing units
Strong backward integration



PAN India Presence
1,13,715+ Retail Network
1,144+ Exclusive Business Outlets (EBO's)
3,026+ Large Format Stores (LFS) & E-Commerce



Strong Financial Performance
Healthy ROCE 68%
Debt Free

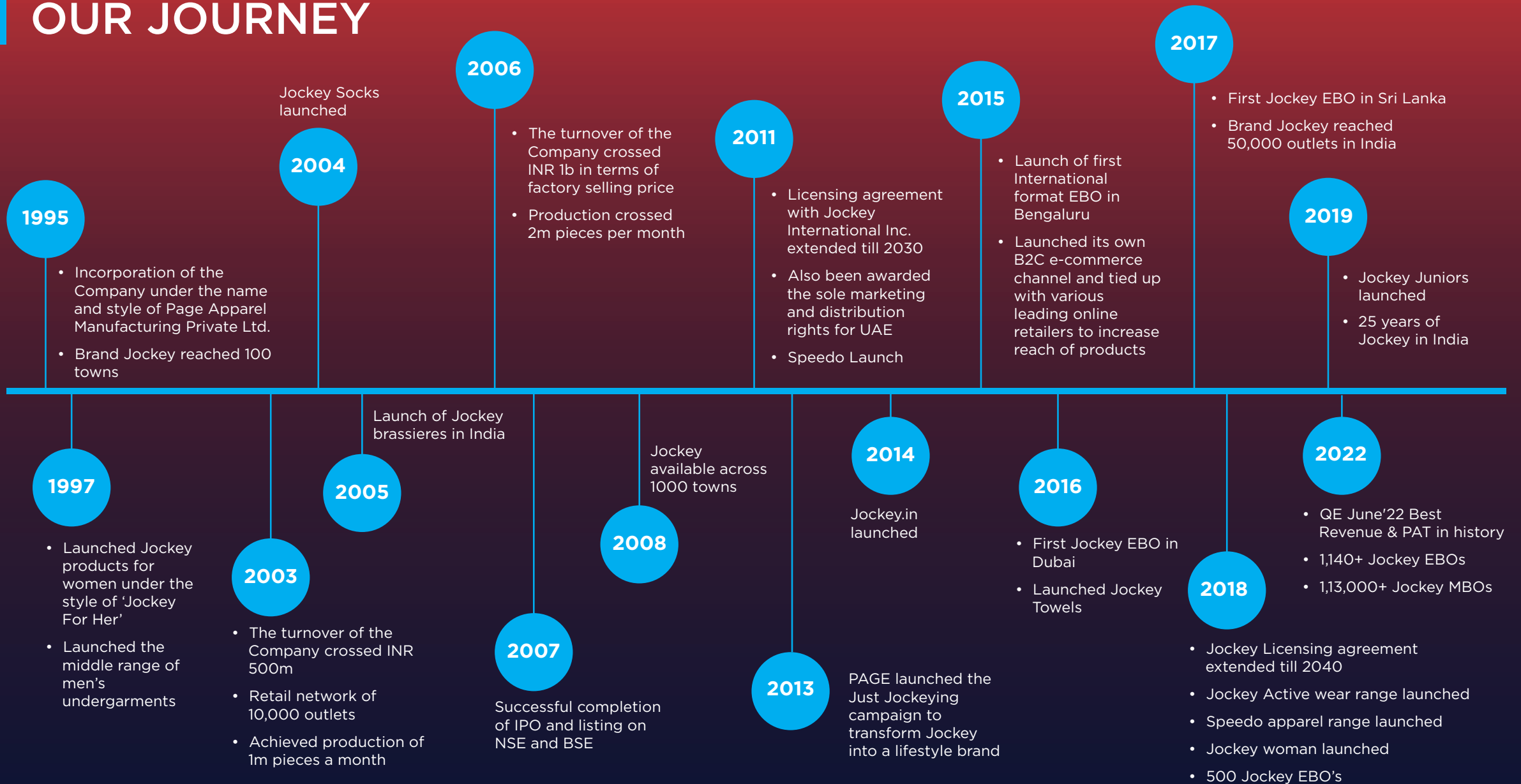
JOCKEY®

- 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



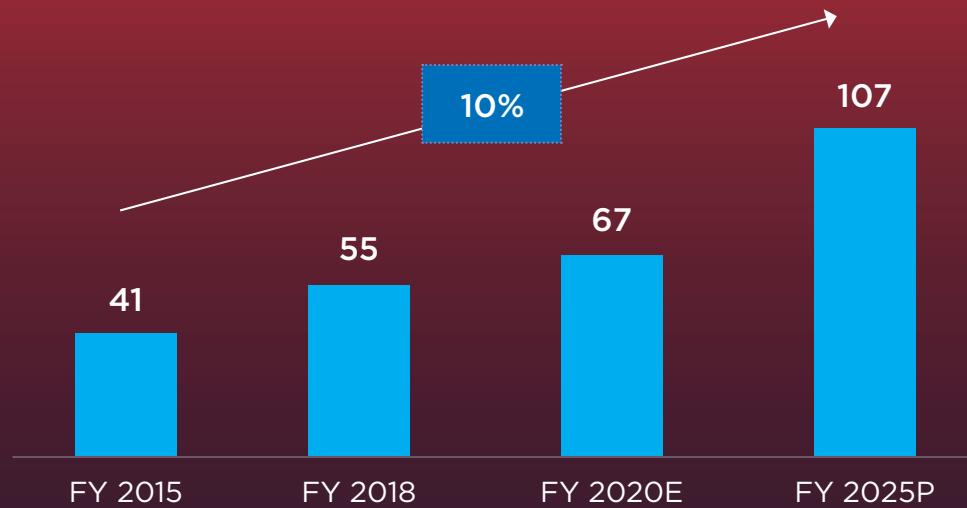
A photograph of a retail store interior, likely a clothing boutique. The store is well-lit with a large black pendant light hanging from the ceiling. In the foreground, there is a rack of dark-colored clothing. Behind it, there are shelves and racks filled with various items, including folded clothes and hanging garments. A sign on the wall reads "MOVE X PAUSE APPAREL THAT WORKS FOR BOTH". Another sign on the left wall says "A timeline of greatness." and "THE ONLY ONE". The overall atmosphere is modern and organized.

ATTRACTIVE MACRO OPPORTUNITY

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ATTRACTIVE MACRO: MULTIPLE DRIVERS FOR GROWTH



Indian Fashion Market (USD Bn)

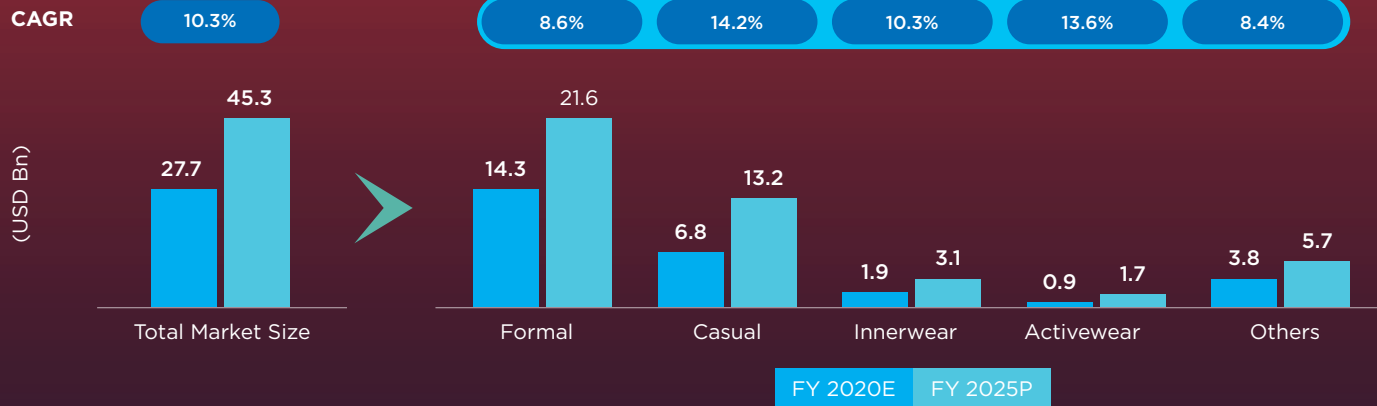
The market is projected to grow at 10 percent and reach USD 107 bn by FY 2025.

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

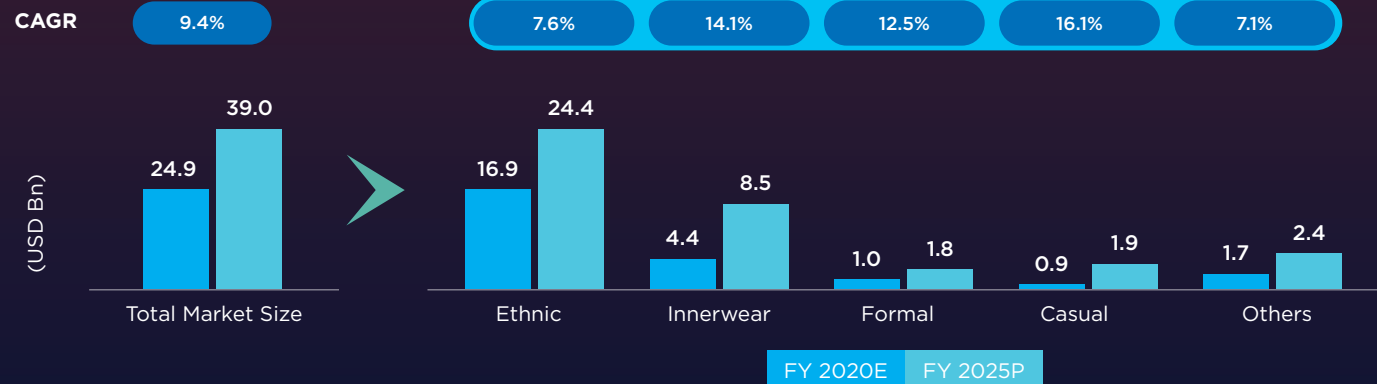


Men's innerwear category in FY2020 is estimated to be USD 1.9 bn and is expected to grow at a CAGR of 10.3 percent to USD 3.1 bn in FY 2025.

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.

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KEY HIGHLIGHTS

KEY HIGHLIGHTS

- Multi Brand Outlets (MBO) - Added 3,167 in Q1 FY23, now present in 1,13,715+ stores and 2,852+ cities and towns
- Exclusive Brand Outlets (EBO) - Added 13 in Q1 FY23, now present in 1,144+ stores and 392+ cities
- Large Format stores (LFS) - Added 1 LFS & 226+ stores in Q1 FY23, now present with 27 partners in 3,026+ stores
- With Robust demand backed by expansion in our channel network, we achieved the best highest ever revenue & PAT, surpassing Q3 & Q4 of FY22
- Continue to be debt-free during this year

A photograph of a retail store interior, likely a lingerie boutique. The store features multiple display cases and shelves filled with various types of lingerie, including bras, panties, and bodysuits in different colors and styles. A prominent 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

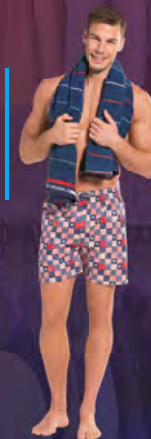


MEN INNERWEAR

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



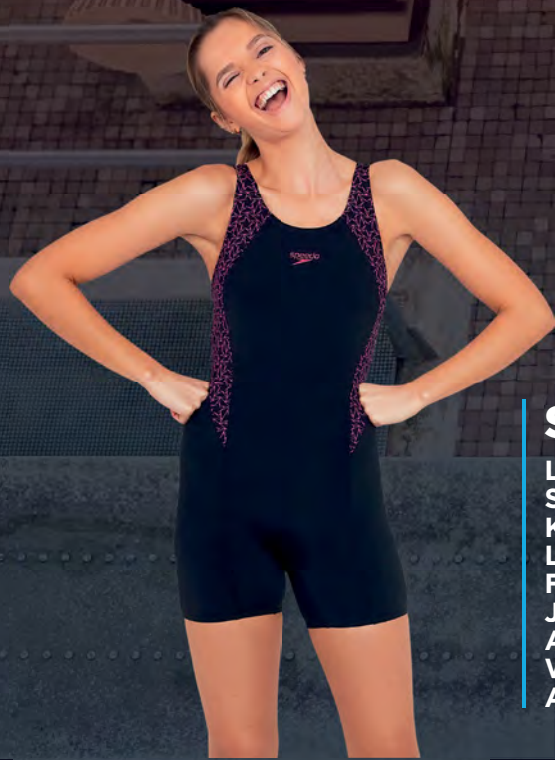
CAPS



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. Above it, a framed image shows a man in athletic wear. To the right, a large display rack is filled with various packages of underwear. A white counter is visible in the foreground. A semi-transparent purple and red graphic overlay is positioned across the middle of the image, containing text.

NEW LAUNCHES

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JOCKEY - NEW LAUNCHES



Style No. IM16
Polo



Style No. AB43
Polo



Style No. AG75
T-shirt



Style No. MV25
Track Pant



Style No. MW81
Performance Training
Shorts

Style No. RX57
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. Promotional signs are visible above the shelves, including one that says "FUN MUST BE TAKEN SERIOUSLY" and another that says "LET'S CREATE SOME TROUBLE". The lighting is bright, and the overall atmosphere is clean and organized.

UNMATCHED MARKET COVERAGE

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MULTI BRAND OUTLETS: PAN INDIA DISTRIBUTION NETWORK

CHANNEL SALES

4,362+ Distributor Accounts

2,852+ Cities / Towns

1,13,715+ Retail Network

743+ Channel Sales Strength



EXCLUSIVE BRAND OUTLETS: FIRST TO OFFER

1144+ Exclusive Brand Outlets

47 Exclusive Woman Outlets

71 Exclusive Juniors Outlets

16 Factory Outlets

217 Outlets in malls

927+ Outlets in high street

Present in **392+** cities



LARGE FORMAT STORES: ENHANCING CUSTOMER REACH



**27 Large Format
partners**



**~ 3,026
Stores**



**~ 4,498
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**



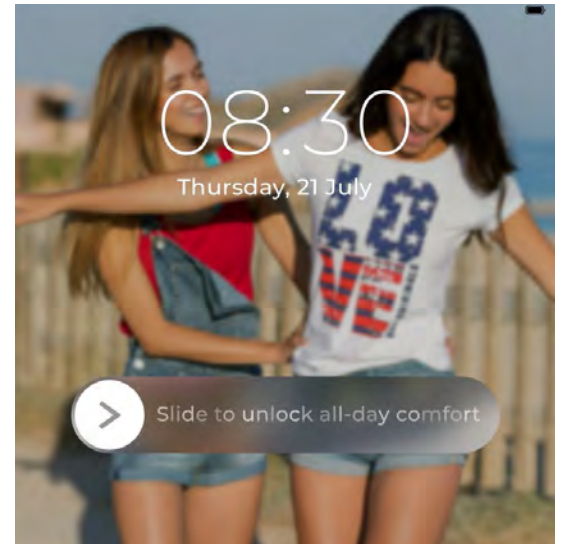
A photograph of a retail store interior, likely a clothing boutique. The store features various displays of clothing, including bras and underwear. A prominent sign on the left wall reads "LET'S CREATE SOME TROUBLE". Another sign on the right wall says "PUSH YOURSELF OR DON'T APPROVED THAT WORKS FOR BOTH". A mannequin is visible in the center. The lighting is modern, with a large black pendant light hanging from the ceiling. The overall atmosphere is clean and organized.

EXTENSIVE BRAND REACH

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DIGITAL/SOCIAL MEDIA REACH



Followers

f 9,23,142

📷 2,70,542

🐦 22,387

▶ 20,200





MANUFACTURING CAPABILITIES

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- **MANUFACTURING CAPABILITIES**
- FINANCIAL HIGHLIGHTS
- SUSTAINABILITY
- SHAREHOLDING PATTERN

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



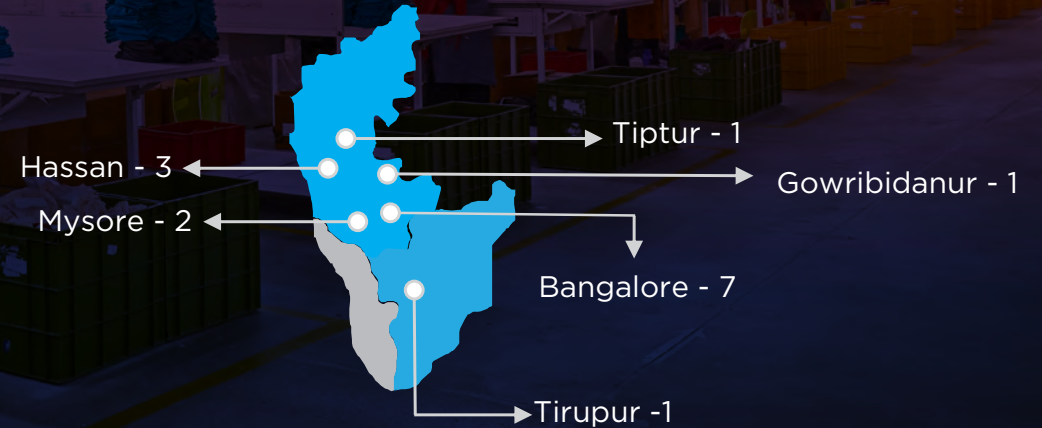
Socks Knitting



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

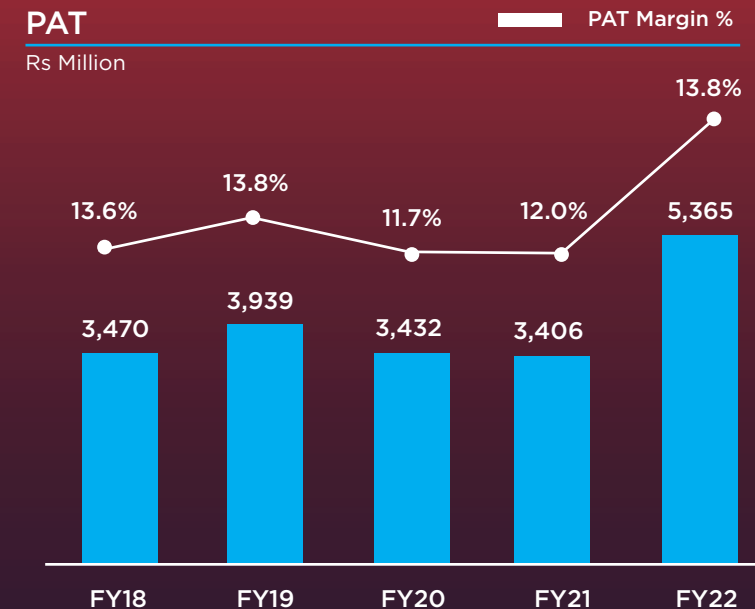
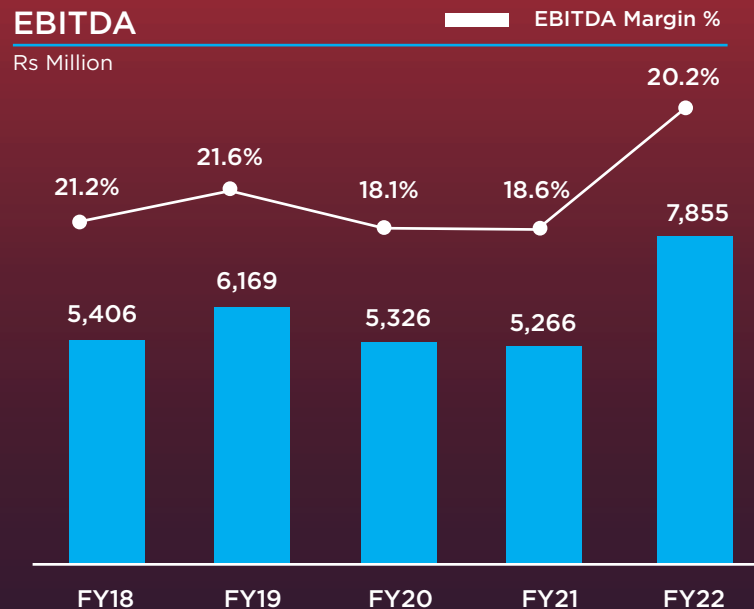
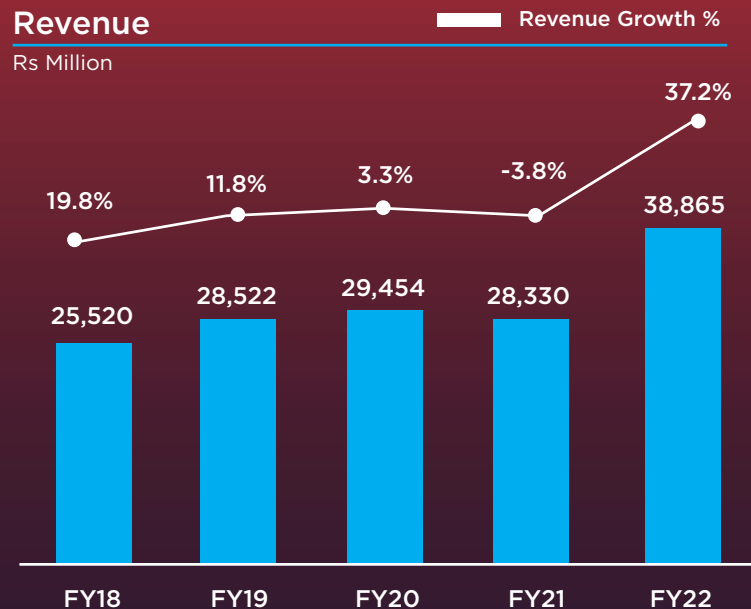


FINANCIAL HIGHLIGHTS

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



Delivered Growth and continuous margin expansion

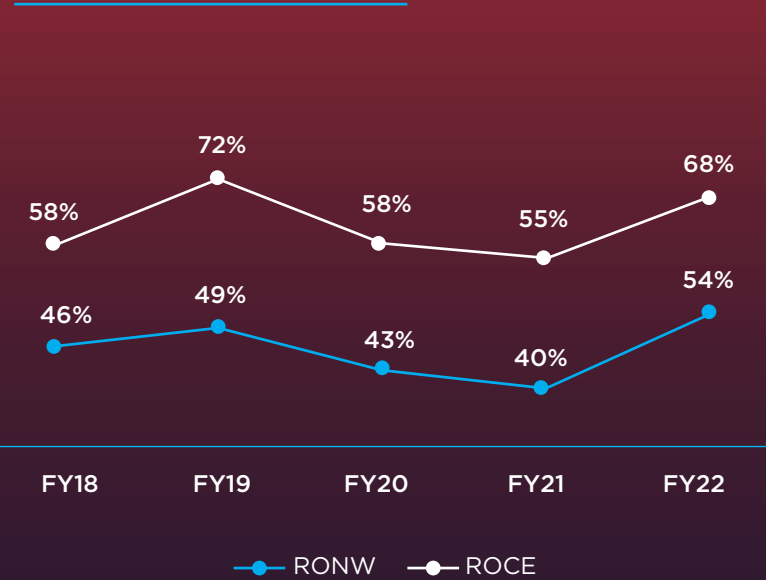
**Strong
Brand Value**

**Expansion of
Distribution
Network**

**Focus on
Profitable Growth**

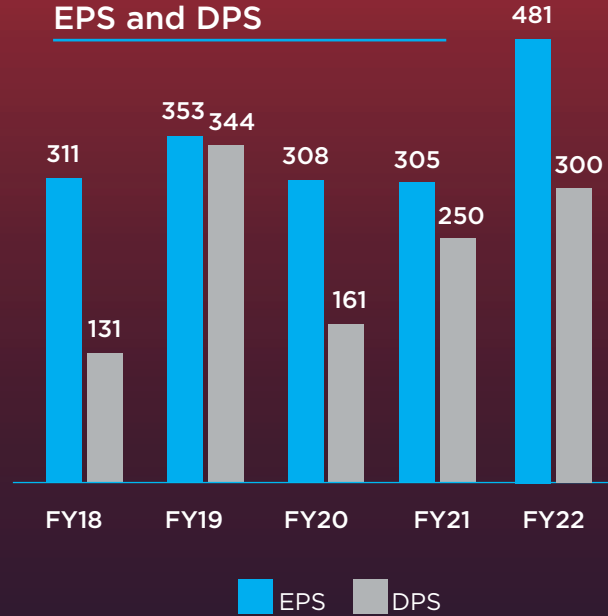
PROVEN BALANCE SHEET STRENGTH

RONW*/ROCE

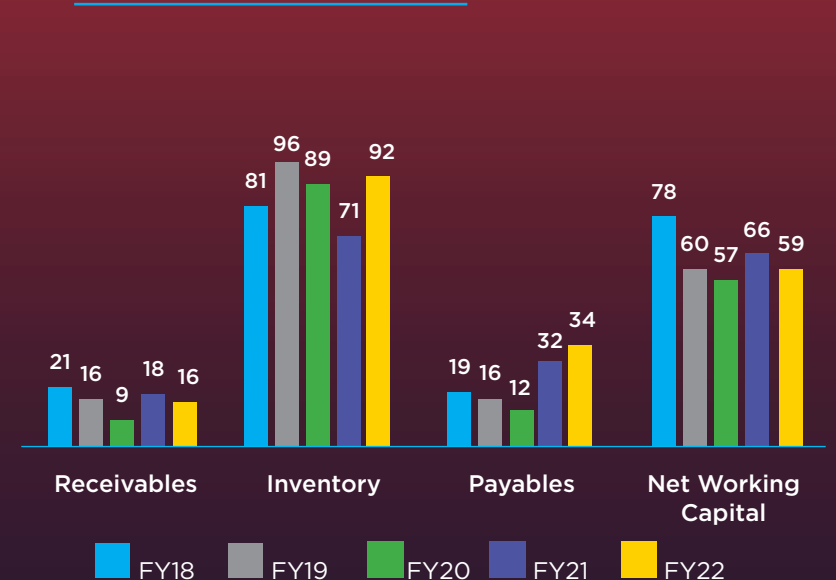


*RONW now calculated on Average Network

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: QUARTERLY

Financials (INR mn)	Q1FY23	%	Q4FY22	%	Q1FY22	%	QoQ growth	YoY growth
Revenue	13,413	100.0%	11,111	100.0%	5,015	100.0%	21%	167%
COGS	6,102	45.5%	4,508	40.6%	2,120	42.3%	35%	188%
Employee Cost	2,160	16.1%	2,006	18.1%	1,527	30.4%	8%	41%
Other operating cost	2,173	16.2%	1,927	17.3%	1,026	20.5%	13%	112%
Emp + operating cost	4,333	32.3%	3,932	35.4%	2,553	50.9%	10%	70%
EBITDA	2,978	22.2%	2,671	24.0%	342	6.8%	11%	771%
Other Income	33	0.2%	49	0.4%	36	0.7%	-33%	-7%
Depreciation	180	1.3%	164	1.5%	159	3.2%	10%	13%
Finance Cost	85	0.6%	97	0.9%	73	1.5%	-12%	16%
PBT	2,746	20.5%	2,460	22.1%	145	2.9%	12%	1792%
Tax	675	5.0%	555	5.0%	36	0.7%	22%	1794%
PAT	2,070	15.4%	1,905	17.1%	109	2.2%	9%	1791%

GROSS MARGIN

Financials (INR mn)	Q1FY23	Q1FY22	FY22
Revenue*	13,187	4,785	37,406
Material consumed*	5,853	1,930	15,585
Sub contract costs [#]	458	224	1,575
Contribution	6,876	2,631	20,245
Contribution %	52.1%	55.0%	54.1%
Other manufacturing costs	1,674	1,005	5,261
Gross Profit	5,202	1,626	14,984
Gross Margin %	39.4%	34.0%	40.1%

* 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

KEY INVESTMENT HIGHLIGHTS



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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

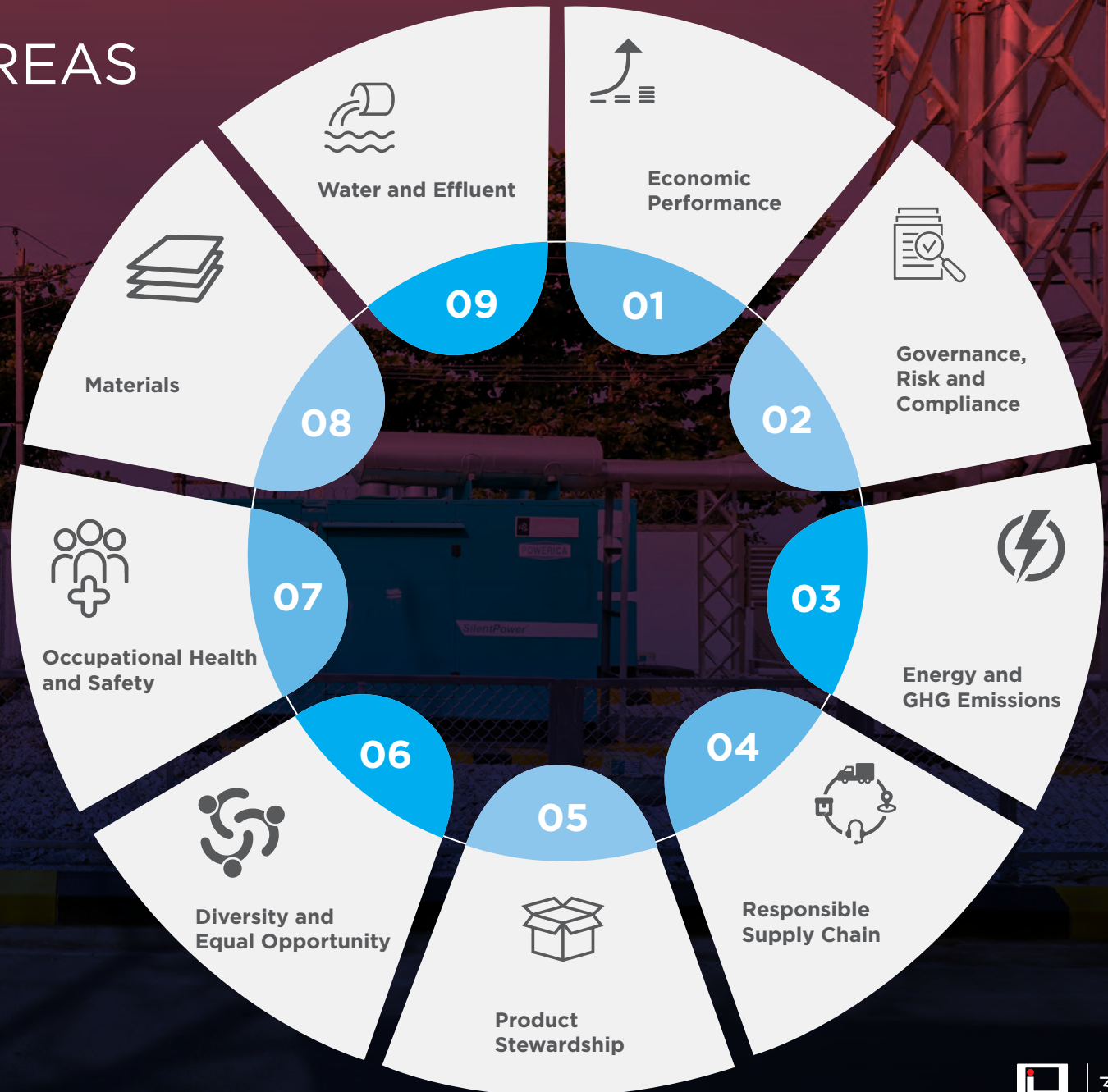
Monitoring and Evaluation

- 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

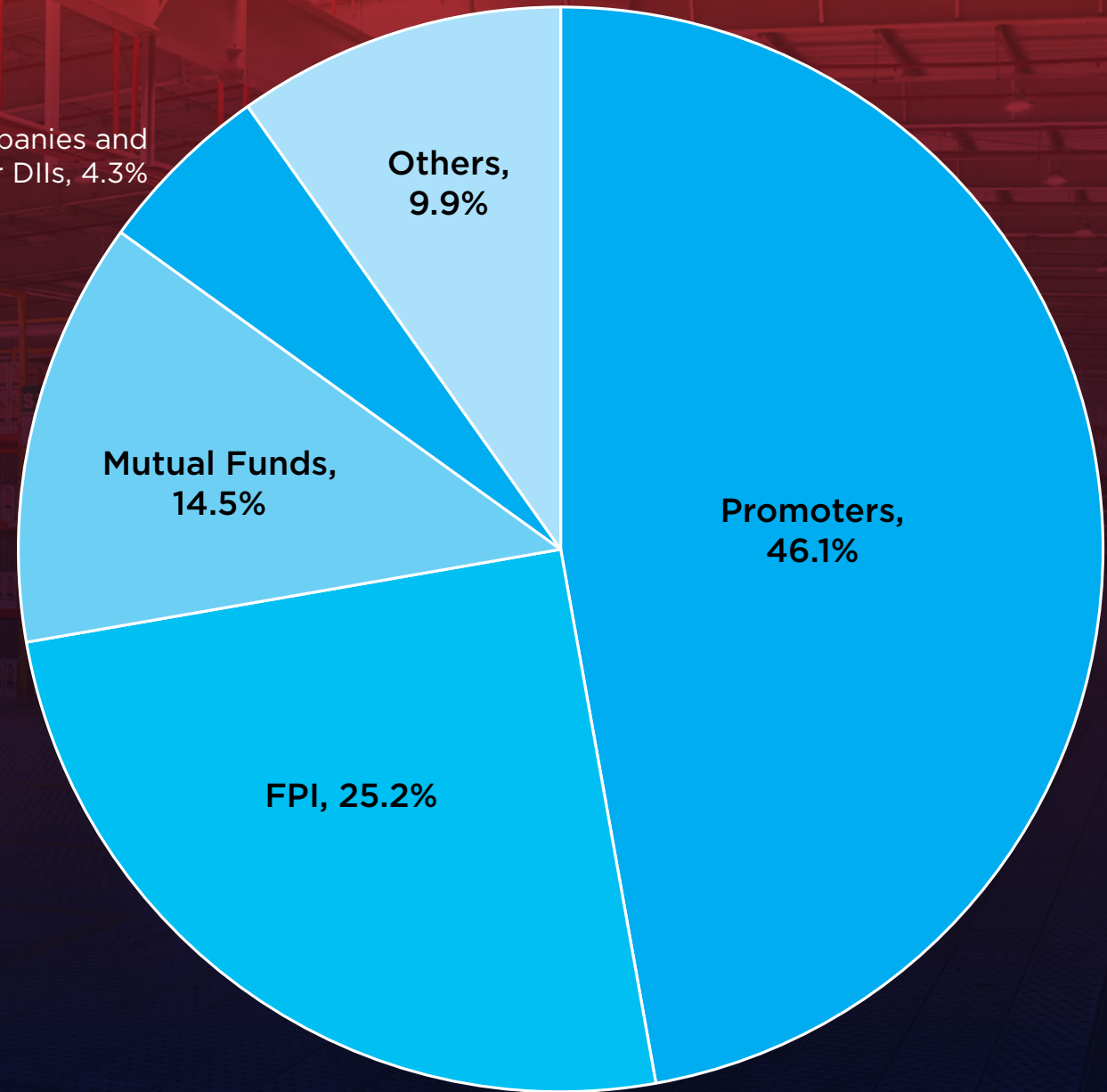
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- SUSTAINABILITY
- **SHAREHOLDING PATTERN**

SHAREHOLDING PATTERN

As of 30th June 2022

Insurance Companies and
Other DIIs, 4.3%



Market Cap: ~ INR 548 bn

(as on 04th August, 2022)



THANK YOU

PAGE INDUSTRIES LIMITED

CIN: L18101KA1994PLC016554

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