



May 30, 2023.

To, The Secretary, National Stock Exchange of India Ltd., Exchange Plaza, C-1, Block G, Bandra Kurla Complex, Bandera (E), Mumbai – 400 051 <u>Symbol: LUXIND</u>	To, The Secretary, BSE Limited, P.J. Towers, Dalal Street, Mumbai- 400 001 <u>Scrip Code: 539542</u>
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Dear Sir,

Sub: Investor Presentation.

Please find enclosed herewith Investor Presentation of the Company. The Investor Presentation is also available on the website of the Company.

This is for your information and record.

Thanking You,

Yours faithfully,
For Lux Industries Limited

SMITA
MISHRA

Digitally signed
by SMITA MISHRA
Date: 2023.05.30
16:48:58 +05'30'

Smita Mishra
(Company Secretary & Compliance Officer)
M.No:26489

Encl: As above

LUX INDUSTRIES LTD



POISED

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MARKET OUTLOOK & COMPANY UPDATE

Market Sluggish post festive

- Gradual softening of demand post Diwali. Demand recovery seen at year end.
- Delayed onset of winter
- Inflationary pressure leading to muted demands
- Economic Segment more severely impact

Market Update

- Volatility in raw material prices during the year has now normalized
- 'Omni channel' being driven by players as their core strategy
- Increased focus on modern trade and ecommerce.

Brand Performance

- Clear shift towards organized segment
- Recorded highest quarterly sales in Q4 led by strong affinity for our power brands
- Revenue grew by 18% & 20% YoY- for brands ONN and Lyra.

Operational Highlights

- Foraying into newer segments with focus on athleisure clothing and womenswear segment.
- Strategically broadening its reach within established markets while exploring new opportunities in both domestic and international markets.
- Aggressive branding and advertising - signed new celebrities as brand ambassadors

- 05 At a glance
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C O R P O R A T E

IDENTITY

ENSURING EVERYDAY COMFORT FOR DECADES

Lux group



Leadership

No.1

Indian innerwear company (volume terms)

₹2,379 crore

Combined revenue from operations



Prominence

~15%

Share in organised men's innerwear market

95%

Fill rate against industry average of 80%

Unique in its value proposition



Scale

34 crore

Garment pieces manufacturing capacity across 7 state-of-the-art plants

2 lakh+

Retailer network across India

46+

Country export presence

3,000+

Employees

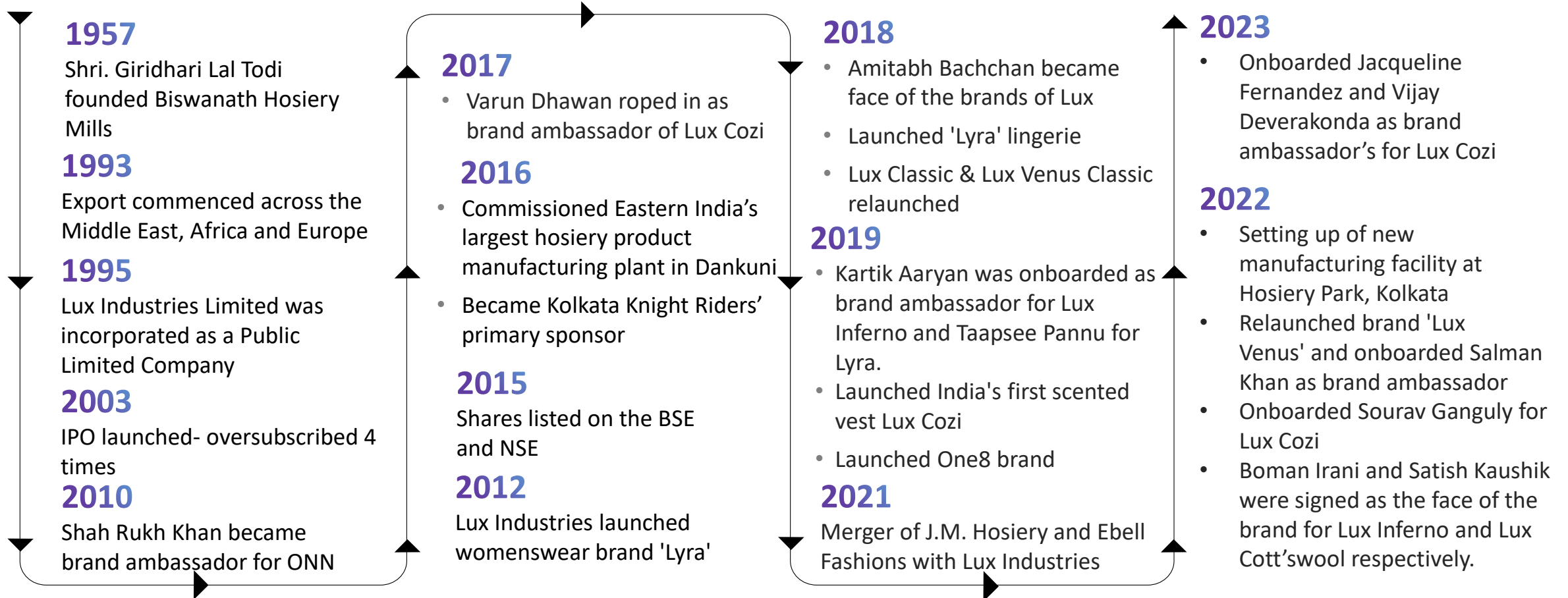
5K+

SKUs; among industry's largest innerwear ranges. It will be 13K+ if colour and size counted separately

100+

Products spanning innerwear, outerwear and athleisure wear categories

BUILDING ON A RICH LEGACY



LUX PRODUCT PORTFOLIO



Men's Innerwear

- Vest
- Brief
- Trunk
- T-Shirt

Kidswear

- Vest
- Mega Brief
- Trunk
- Half Pant
- Track Pants
- T-Shirt



Men's Innerwear

- Briefs
- Vests
- Boxers
- T Shirts



Womenswear Innerwear

- Brassieres
- Panties
- Camisole
- Shapewear



Mens Innerwear

- Vest
- Brief
- Trunk
- Thermals



Mens Outerwear

- T- Shirt
- Track Pant
- Jackets
- Sweatshirt
- Half Pant
- Joggers
- Socks

Kidswear

- T- Shirt
- Track Pant
- Sweatshirt
- Jackets



Men's Innerwear

- Vests
- T Shirts
- Track Pants
- Briefs & Trunks
- Boxers
- Shorts
- Winterwear



PRESENCE ACROSS DIVERSE PRICE POINTS

Categories	Prominent brands			Winter Wear	**Total Revenue in ₹ Cr
Premium					
₹ Cr	142	185	23		350
Semi-premium					
₹ Cr	633	362	95	134	1224
Economy			Others		
₹ Cr	612	39	70	66	787



Presence across price segments helps the Company cater to a wide customer base and fast-track growth

** Note : Net sales revenue of YE Mar'23

PBT MARGIN

Margins	Prominent brands	*Total Revenue in ₹ Cr
10-13%	    	846
8-10%	 	728
Upto 8%	   <p>Others</p>	787



Presence across price segments helps the Company cater to a wide customer base and fast-track growth

*Note : Net sales revenue of YE Mar'23

WIDENING AND DEEPENING REACH

1,170+ dealers'
network

Available in 2 lakh+ multi-
brand stores and 9 EBOs

Stronger e-retail platform
presence

11 Depots drive faster
distribution in India

550+

Sales teams drive offtake

19

Warehouses (12 states)



Strategically located
manufacturing units
(West Bengal, Punjab,
Tamil Nadu and Uttar
Pradesh) to address
growing markets



TAKING HOMEGROWN BRANDS TO THE GLOBAL MARKET

Star Export House recognition by Government of India



24

New countries added in past 5 years

46+

Country-wide presence

60

Targeted country-presence by 2025

Market traction in tropical countries (including GCC region and Africa)

Geography-wise sales

92%

Domestic

8%

Exports



ADVANCING WITH GOOD GOVERNANCE

Experienced Board

- Promoter-Directors with 25+ years of average industry experience; expertise- Sales & Marketing, Brand Promotion, Product Development, Board service & Governance
- Independent Directors with expertise in Accounting & Finance, Legal, Printing and Packaging

- Inducted E&Y as Internal Auditor
- Inducted Economic Laws Practice (ELP) as Compliance Consultant
- Inducted Mumbai based consultant for SoP's, RM and IFC
- S.K. Agarwal and Co. is the Statutory Auditor

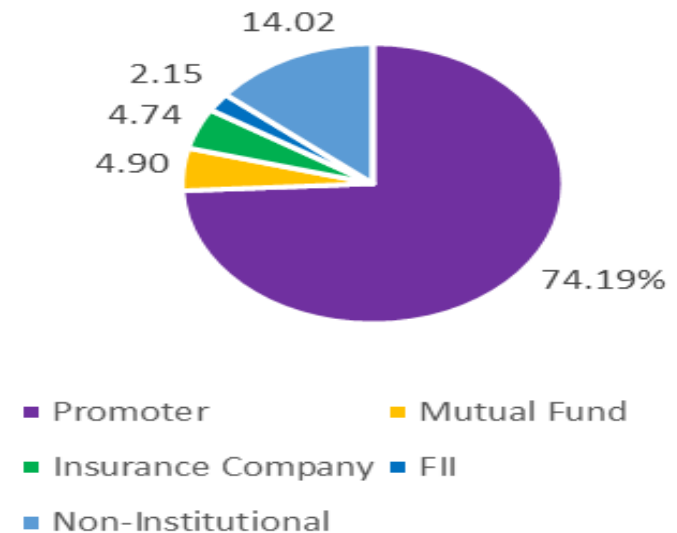
Strong Management Team

- Inducted several new members in the recent years
- New members include:
Udai Kumar Agarwal- COO
Prateek Agarwal – GM-IT and New Initiatives
Amit Kumar Goel – AVP, Finance
Ajay Nagar– Chief Financial Officer

Growing Trust

- Marquee investors like Nippon Life India, Jupiter India Fund, Kotak Mutual Funds and Life Insurance Corporation of India, among others
- Covered by key research and brokerage houses such as Anand Rathi, SMIFS, B&K Securities, Phillip Capital

Shareholding Pattern as on 31.03.2023



2/12

Women Independent Directors

50%

Share of Independent Directors on Board

STRENGTHENING INTERNAL CONTROLS

Robust risk-management framework

- Minimal manual interventions
- Well implemented Cyber Security framework

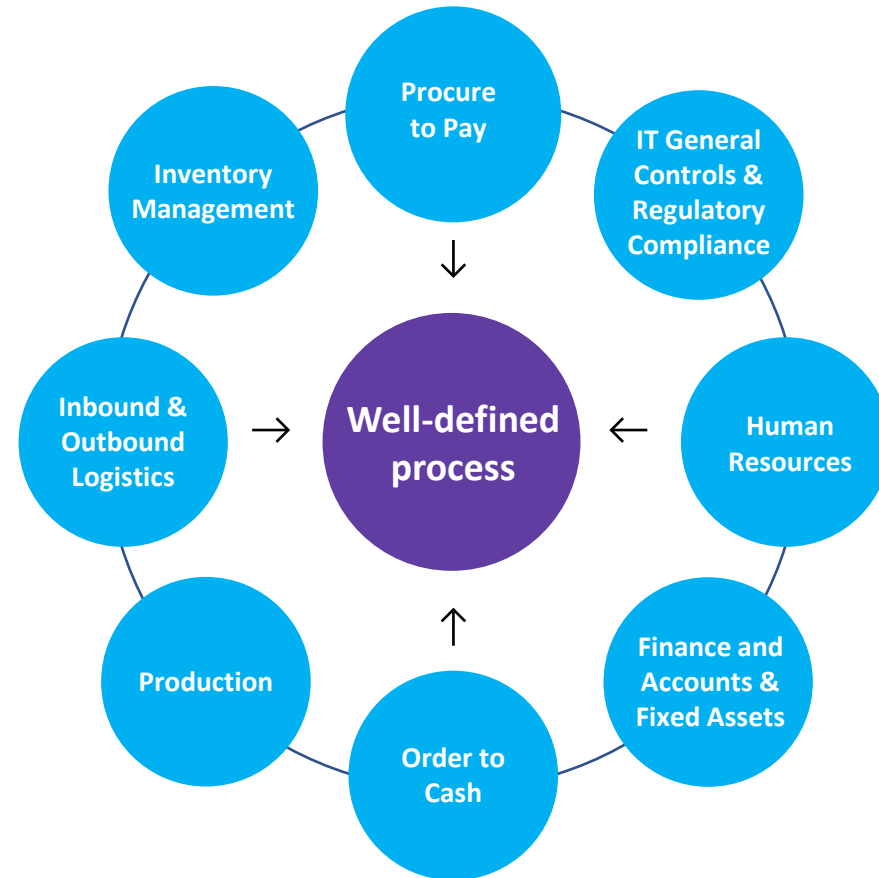
Organisation-wide accountability

Execution excellence through:

- Digital capability
- Streamlined processes
- Higher transparency

Process to be fully streamlined by 2023-24

SOP driven culture



15 Opportunity landscape



OPPORTUNITIES

RESPONDING TO MARKET OPPORTUNITIES

1,170+

Strong distribution channel

3,000+

Employee workforce

20+ years

Longstanding dealer relationship

₹50 crore

Near-term investment to augment production through internal accrual

₹24 to ₹1790

Price range of products

~15%

Existing market share in men's innerwear

₹134 crore

Gross cash balance

674+

Districts-presence in India



Lux industries Dankuni factory

Lux Industries Limited

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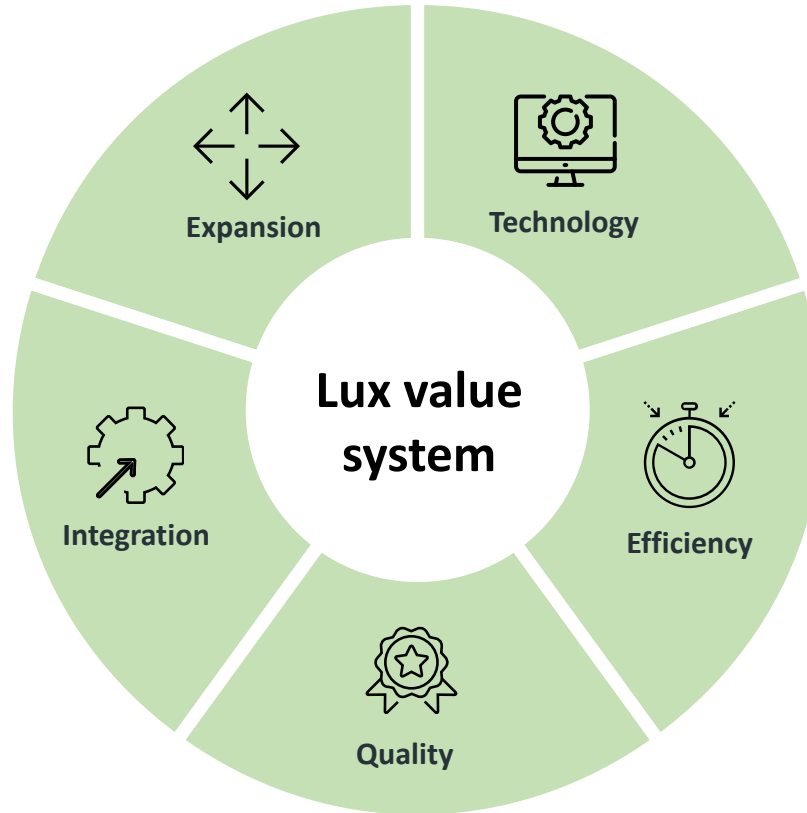
FAST-TRACK

PROGRESS

GROWTH INITIATIVES

Expansion: Foraying into new segments and geographies and expanding multi-channel footprint

Quality: Creating new benchmarks for quality and comfort



Technology: Augmenting digital capability with investments in automation (SAP Hana) for enhanced operational control

Efficiency: Presence across value-chain and scale driving organisation-wide efficiency



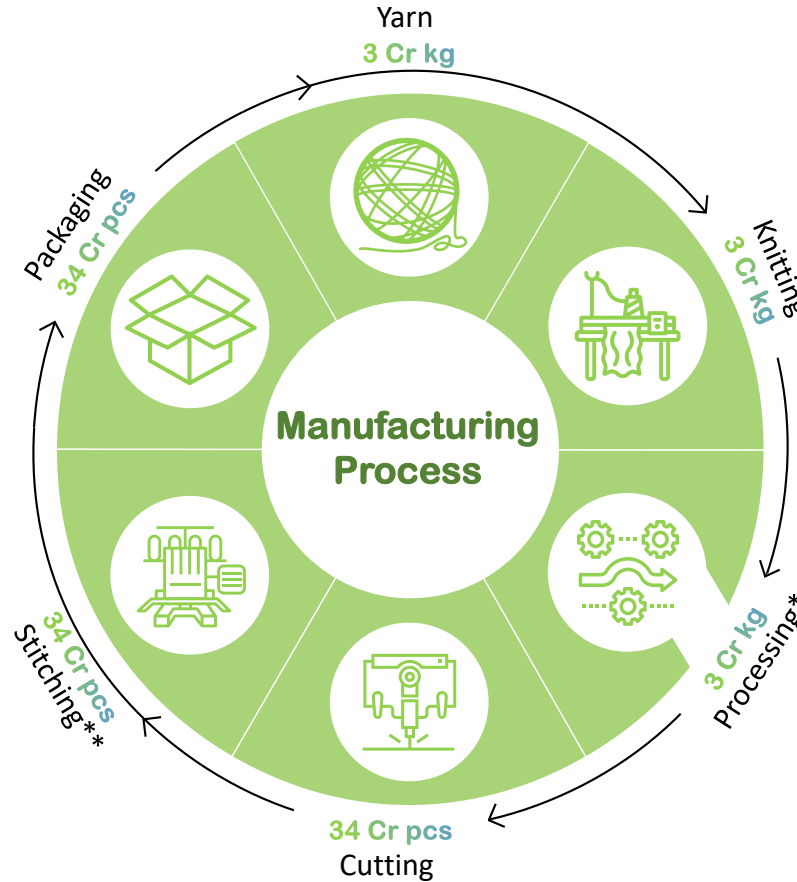
ENHANCING MANUFACTURING CAPABILITIES

Demonstrated manufacturing excellence for over 3 decades

Ability to consistently deliver high quality products on timely basis

₹13.4 crore*

Investment on machines from Italy, Germany, and Singapore



Flexible core manufacturing process

Key focus areas: quality, cost effectiveness and innovation

Completed upgradation and replacement of old equipment

* Year Ended Mar'23

Note **Outsourced to job workers with strong company control

VENTURING INTO NEWER REGIONS AND SEGMENTS

From an innerwear pureplay to a mix of athleisure and outerwear player

Unique socks, innerwear and sleepwear collection for One8, globally

Establish presence in 60 countries; grow exports revenue by 60% in five years

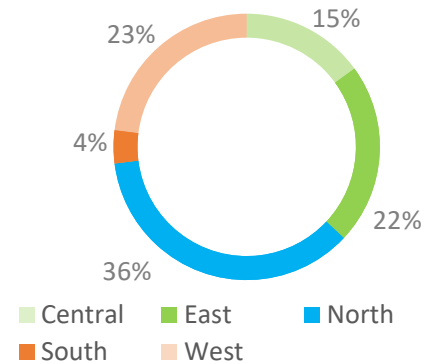
Diversify product portfolio in female (innerwear and outerwear) and kids segment

Focus on premium innerwear range:
 - ₹349 Crore in YE Mar'23
 - Expected ₹500 Crore by FY25

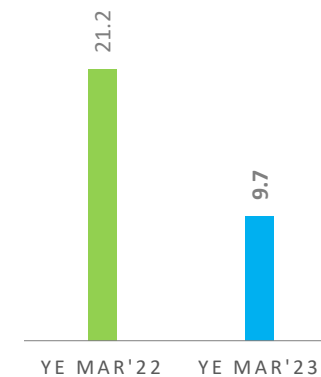
Future growth in women's wear sector by innovating and introducing new products that are comfort-driven

- More than ₹400 Crore in YE Mar'23
 - Expected to cross ₹600 Crore by FY25

Domestic Sales (%)



EBITDA margin (%)



Share of revenues from value, semi-premium and premium products category of YE Mar'23

Revenue share	Amount %	Volume %
Premium	15	11
Sub Premium	52	41
Economy	33	48

Share of revenues from value, semi-premium and premium products category of YE Mar'22

Revenue share	Amount %	Volume %
Premium	14	11
Sub Premium	52	40
Economy	34	49

EXPANDING THROUGH MULTI-CHANNEL FOOTPRINT

- Growing wholesale market presence
- Association with 1,170+ dealers with focused engagement initiatives

Strong presence in multi-brand outlets and large format stores

Enlarging e-commerce footprint with Amazon, Flipkart, Myntra and AJIO, among others



#FOFO: Franchise-owned-franchise operated

Adopting investment-light #FOFO model

Target revenue of ₹100 Cr from online sales in next 3 years



<1%

Dealer attrition

4,000+

Average daily online orders

9

Exclusive brand outlets (EBOs)

160+

Large store formats to showcase the entire product range

CRAFTING 360° BRANDING INITIATIVES

Building brands judiciously

Salman Khan, Sourav Ganguly, Vijay Deverakonda, Varun Dhawan, Boman Irani, Taapsee Pannu are brand endorsers

Sponsored KKR team in the IPL to enhance brand respect and visibility worldwide



₹847 crore

Branding investments in the last seven years including FY23

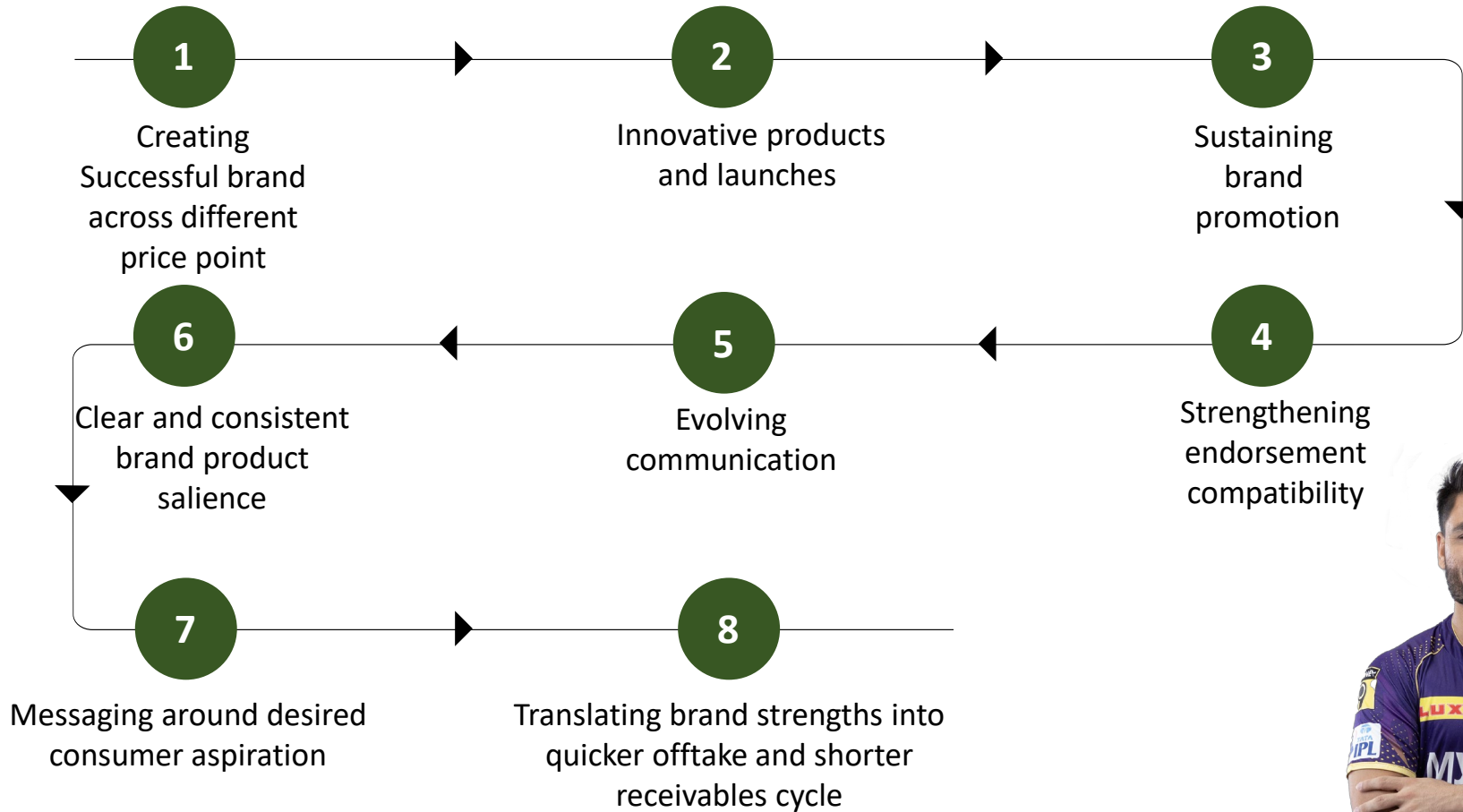
8%

Average share of revenues spent on branding (FY17- FY23)

12.74

Return on every rupee spend on A&P for YE 23

CREATING SUCCESSFUL BRAND STRATEGY



THE INNER STORY
July – Sep, 2019
VOL I | ISSUE III

FROM THE CHAIRMAN'S DESK

We heartily welcome you all to a successful completion of Q2. The innovations and progressions made in the Q1 yielded us tremendous appreciation, especially for the launch of Lux Cozi Scented Vest, the first ever in India. Even, our overseas campaigns conducted to promote the scented vest range in the GCC countries were a huge hit as the product did immensely well in their market.

This quarter, we opted for developments that proved to be quite beneficial for the organization. Be it the launch of one8, increasing our product range under our premium brand ONN and trendy brand GenX, or launching Taapsee Pannu as the new face for Lyra, we garnered a noteworthy response from our consumers all across.

Meanwhile, many new projects are in the pipeline, starting from our portfolio expansion to new launches. We believe these persistent changes will enable us achieve new milestones for our brand in the coming months.

LUX TIES-UP WITH VIRAT KOHLI'S ONES UNDER ARTIMAS FASHIONS

Artimas Fashions Pvt. Ltd., a subsidiary of Lux Industries Ltd., and the official licensee for Indian cricketer Virat Kohli's one8 innerwear collection has recently launched the much-awaited one8 innerwear range. The one8 innerwear has officially launched two collections under the brand, 'Edge' and 'Scented', which include innerwear varieties and socks in the same category. The company has officially flagged off the on e-commerce with a TVC featuring Virat Kohli.

The product range has been meticulously idealized for a man, which is always on the move and believes in comfort in every situation. Staying true to brand phy, the subtle branding strikes a chord with the core message "Comfort for the Restless".

TAAPSEE PANNU- THE NEW FACE FOR LYRA

After successfully establishing itself as the leading legging brand in the country, Lyra is now topping the chart of becoming the number one women's wear brand in the segment. To welcome this change, the brand recently roped in the compassionate actress Tapsee Pannu as the new face for Lyra.

As Tapsee Pannu is perfectly in sync with the youth, and the generation's latest-favoured, she will aptly strike a chord with the brand's consumer base. This move will not only reflect the actress's confidence, positivity and liveliness of the brand, but will also aid the brand to connect with its consumers directly.

The latest slogan of Lyra "Time to Style" is a straight message to its consumers that if you got to style, it's none other than Lyra.

FEATURES Pg 2

- The latest winter collections are here!
- ONN expands into kids wear segment
- Lyra launches 'Black Pearl'
- Lux Cozi Tyle Thank the latest from Lux Cozi

Pg 3

- Lyra TVC wins hearts
- ONN launches new TVC for men's poles and ties
- Lux Cozi launches the new TVC for Scented Vest
- ONN - All India Sales Meet, 2019

Pg 4

- Awards so prestigious!
- ONN TIME
- Justine Words
- Puzzle Words

ACCELERATING DIGITAL ADOPTION

End-to-end IT solutions through dealer integration systems

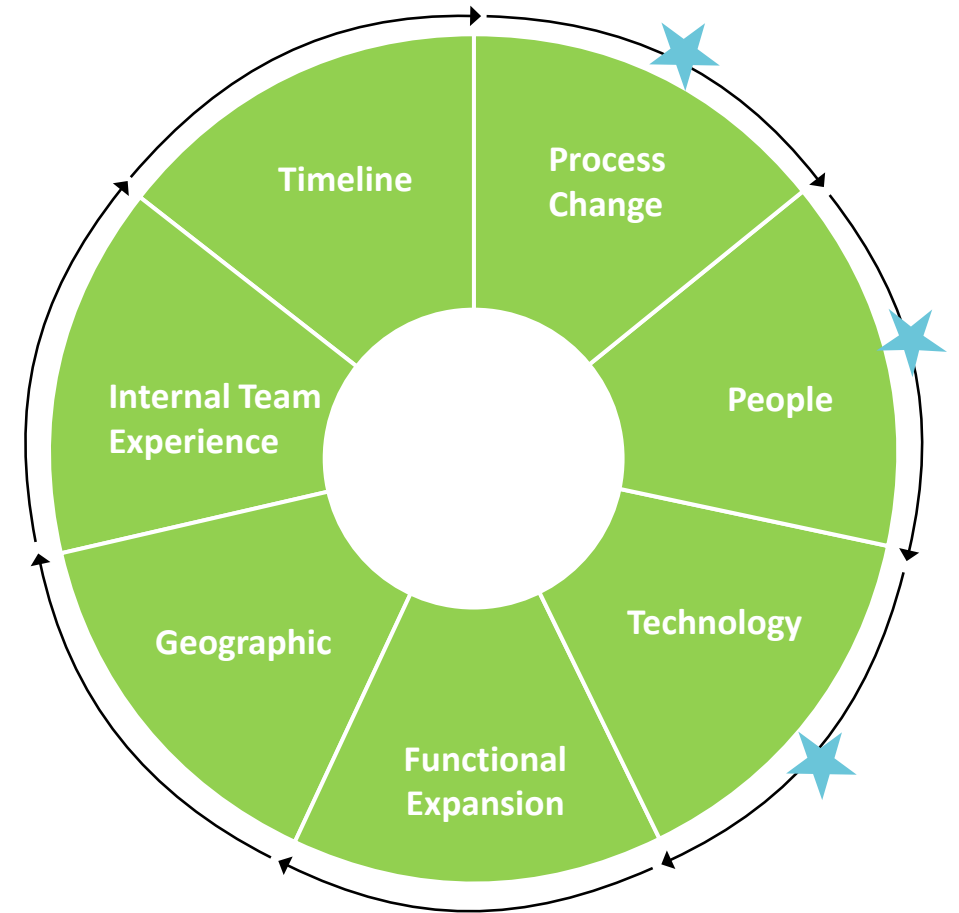
Enhanced MIS system for business visibility; data-based decision-making

Led by Bibek Maity, CIO and his 25-member team

Rollout new website “www.onninternational.com” direct ONNline platform for customers

IT New Initiatives by developing new age solutions for better customer experiences – led by Prateek Agarwal and his team.

Launched ‘Lyra Connect’ Retailer App- a first of its kind app to directly connect with its retailers



STRENGTHENING FINANCIALS

Overhauled credit policy to strengthen working capital

14.19%

ROCE, YE Mar'23

188 days

Working Capital Days in YE Mar'22

176 days

Working Capital Days in YE Mar'23

Deleveraged balance sheet and created strong liquidity buffer

3.7%

Sales Growth, YE Mar'23 vs YE Mar'22

132 days

Inventory cycle in YE Mar'22

104 days

Inventory cycle in YE Mar'23

Aggressive investment in brand building with focus on premiumization

₹134 crore

Gross cash and cash equivalents, YE Mar'23

46 days

Creditor days in YE Mar'22

50 days

Creditor days in YE Mar'23

30x

Interest cover in YE Mar'22

9x

Interest cover in YE Mar'23

Working Capital days has improved marginally on account of better inventory management.

0.26

Debt-equity in YE Mar'22

0.17

Debt-equity in YE Mar'23

OUR LEADERSHIP PROFILE



Ashok Kumar Todi
Chairman

- Visionary, Founder and Promoter
- Commerce Graduate; engaged in the hosiery business for over five decades
- Forte lies in capturing market share, marketing, formulating various policies for growth and expansion
- Introduced attractive schemes for dealers, retailers and consumers
- Associated with various philanthropic organisations in India



Pradip Kumar Todi
Managing Director

- Founder and Promoter
- Commerce Graduate
- Primarily focuses on product development and production functions
- Deep technical knowledge of the hosiery industry
- Forte lies in developing new patterns, yarn combinations, and knitting technologies
- Introduced new styles and optimised production costs

NEXT GENERATION TAKING VISION FORWARD



Navin Kumar Todi
Executive Director

- Commerce Graduate
- Engaged with the Company for 21 years
- Looking after the GenX and Lux Cozi Her brands
- Responsible for operations of the Tirupur unit
- Focusing on product premiumisation, new brands and product categories



Rahul Kumar Todi
Executive Director

- Post Graduate (Marketing) from GRD, Coimbatore
- Engaged with the company for 17 years
- Looking after the Production function of the Tirupur Unit
- Handled wide range of responsibilities across businesses
- Overseeing several functions like finance, personnel, operations, among others



Saket Todi
Executive Director

- Post Graduate (Brand Management) from MICA
- Engaged with the Company for 9 years
- Responsible for premium brands in the retail channel - ONN brand and exports market
- Introduced in-house capacity for stitching for better quality and cost control
- Expanded presence by 24+ countries
- Focus on quality; created a loyal customer base



Udit Todi
Executive Director

- MSC in Finance from LSE, Economics (Hons.) from St. Stephens College, Delhi.
- Engaged with the Company for 9 years
- Launched brand Lyra - +500 crore within 5 years making it the market leader.
- Instrumental in setting up the Dankuni facility with cost optimization.
- Setting up new facilities for further growth plans.
- Expanding women's wear segment into a complete range including inner wear and athleisure.

STRENGTHENING THE MANAGEMENT TEAM

Professionals in key positions



Udai Kumar Agarwal
Chief Operating Officer - COO

- Qualified Chartered Accountant and Cost Management Accountant
- 13+ years of experience in Manufacturing Industry, Strategic Planning, Setting up of projects, Business Development and Business Improvement.
- Represented many global companies having recognition worldwide such as Creora, PT. Primayudha Madirijaya, etc.



Smita Mishra
Company Secretary & Compliance Officer

- Qualified Company Secretary, associated with the Company for the last 11 years
- Heads the complete compliance functions and ensures efficient administration; compliance with statutory and regulatory requirements
- Played a critical role during listing on NSE and BSE



Sanjay Mittal
Vice President (Sales)

- Has led and supported various leadership roles for 25+ years at the company
- Heads the sales function and plays a significant role in formulating the Sales Strategy
- Strong understanding of hosiery market and achieving targets, critical role in gaining market share via new launch with incremental topline

STRENGTHENING THE MANAGEMENT TEAM

Well-defined roles and responsibilities



Bibek Maity
Chief Information Officer

- Postgraduate (MBA & MCA)
- 22+ years of experience in IT
- Associated with the Company for 5+ years
- Responsible for SAP implementation in the Company
- Enabling smoother business decisions by implementing IT-enabled tools



Surendra Kumar Bajaj
Vice President (Marketing)

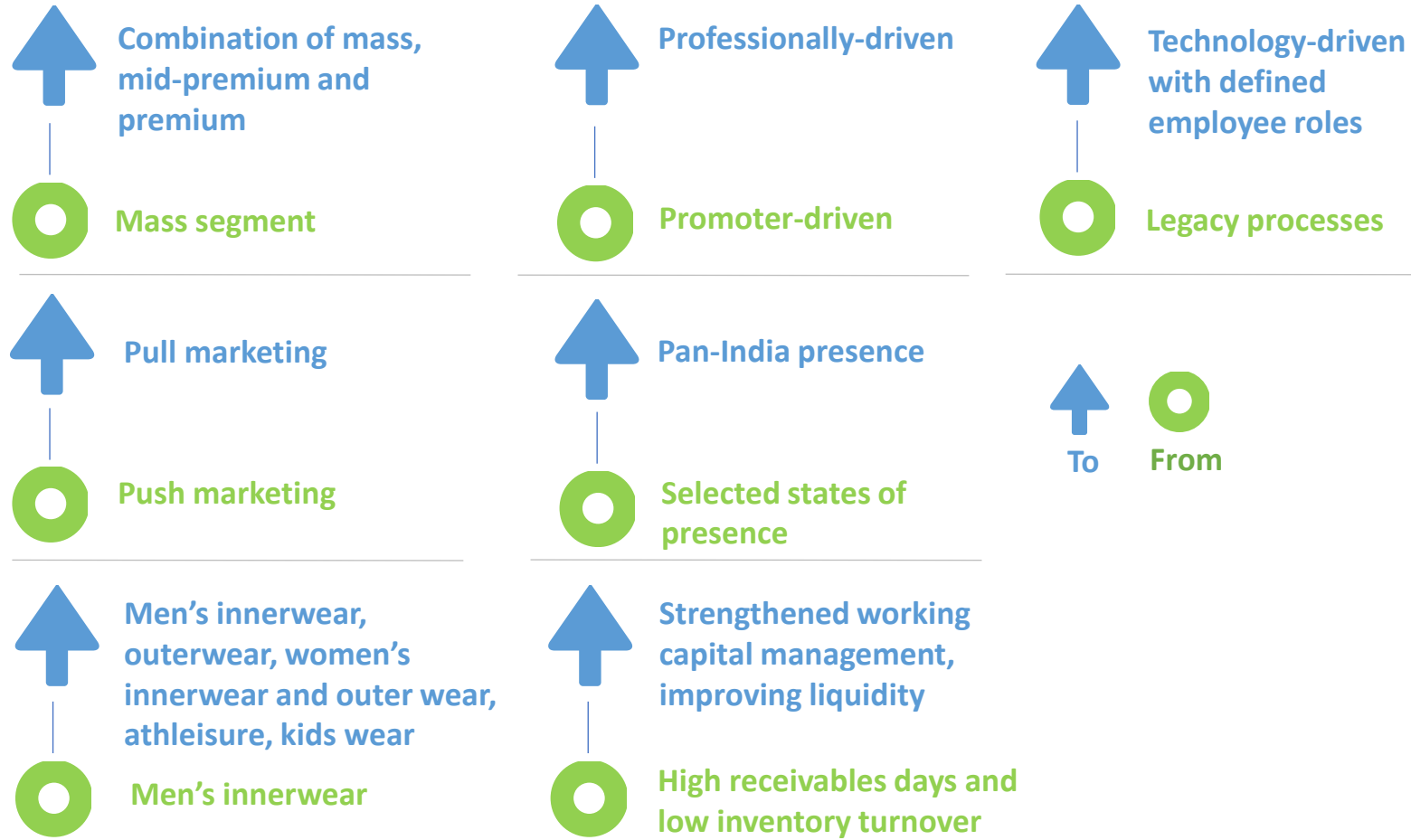
- 35+ years of experience in marketing industry
- Associated with the Company for 6+ years
- Worked with Khaitan Group of Companies before joining Lux
- Instrumental in formulating marketing strategy and plans



Prateek Agarwal
GM – IT & New Initiatives

- Qualified Chartered Accountant and Company Secretary
- 10+ years experience in IT & IT-enabled Business Development
- Worked with companies like Vikram Solar, Century Plyboards.
- Demonstrated history of working towards IT-enabled Business Development, ML, IoT, Salesforce CRM

PREPARED FOR TOMORROW



- 31 Business Highlights
- 32 Financial performance



PERFORMANCE

FY'23 BUSINESS HIGHLIGHTS



FINANCIAL PERFORMANCE

3.7% annual YoY sales growth

Quarterly YoY sales growth of 22% along with 32% volume growth

Recommended dividend of 250% of face value of Rs. 2/- each



POWER BRANDS

Power brands ONN and Lyra registering annual growth of 19% and 20% respectively.

Wide range of brands and products- catering across all age groups.

Lyra continued to dominate market in womenswear segment



DIGITAL PLAY

Pivoting from primarily offline to Omni-channel enabled innerwear & Outerwear brand.

Investing in IT infra to build digital platforms and create a connect with the channel partners

Having presence in major ecommerce platforms.



BRAND INVESTMENT

Substantial investment in brand building

Roping in top celebrities as brand ambassadors

Enhancement of brand appeal through targeted marketing initiatives



GROWTH DRIVERS

Long Standing Relationships with Distributors.

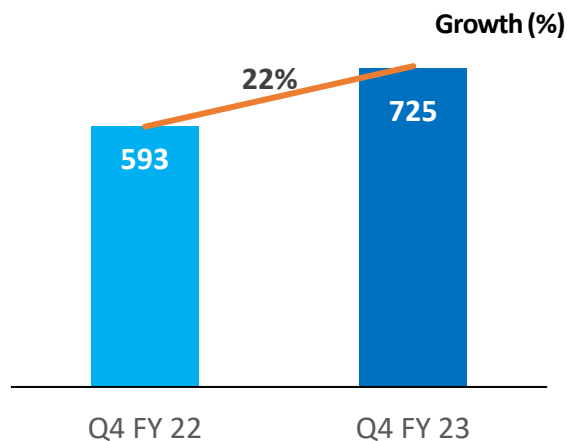
Experienced Board of Directors aided by professional partners

Significant potential and space for growth of our emerging brands

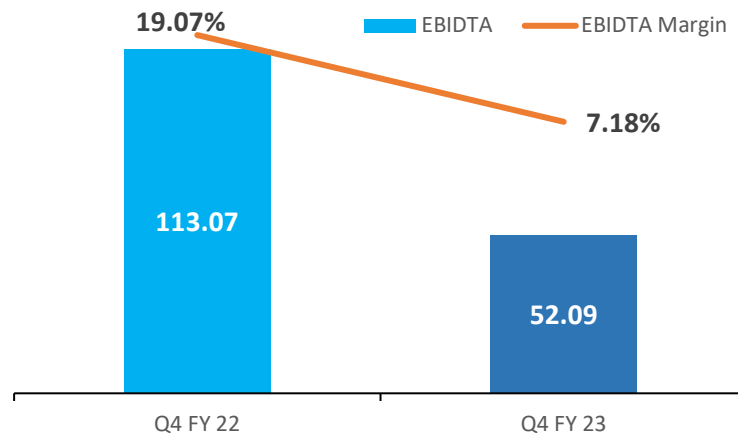
FINANCIAL SNAPSHOT – Q4 FY23 & FY23

Q4FY23

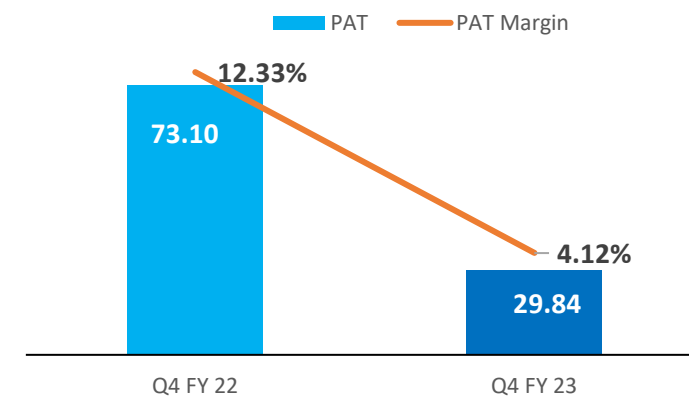
Revenue (₹ In Crores)



EBITDA (₹ In Crores)

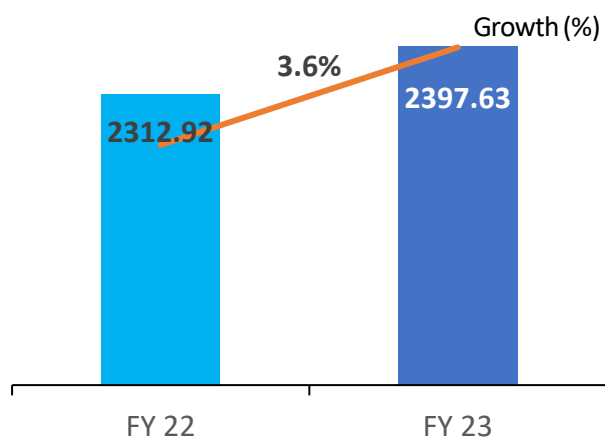


PAT (₹ In Crores)

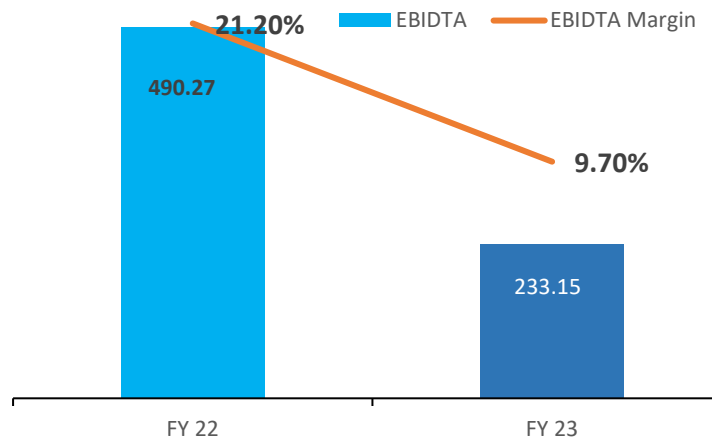


FY23

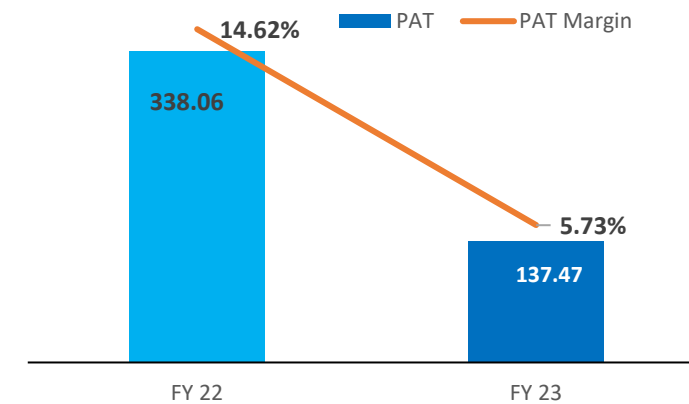
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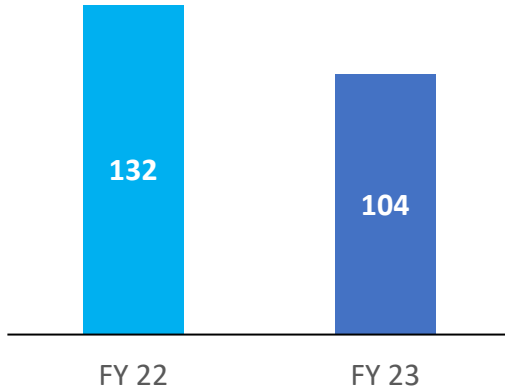


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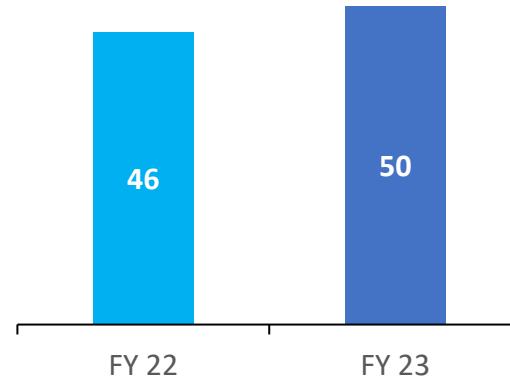


PERFORMANCE

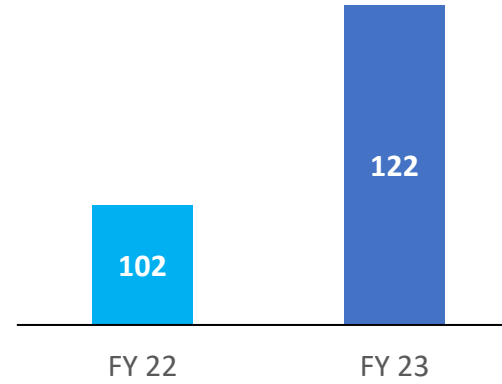
Inventory Turnover (days)



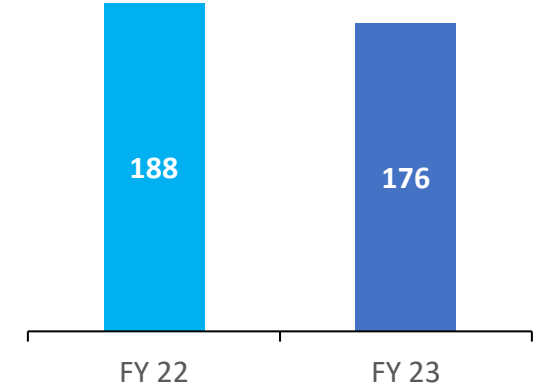
Credit Turnover (days)



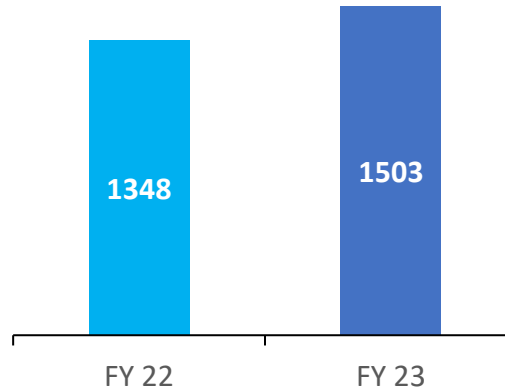
Debtor Turnover (days)



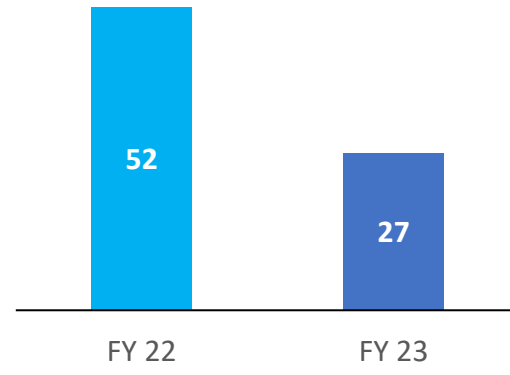
Working Capital Turnover (days)



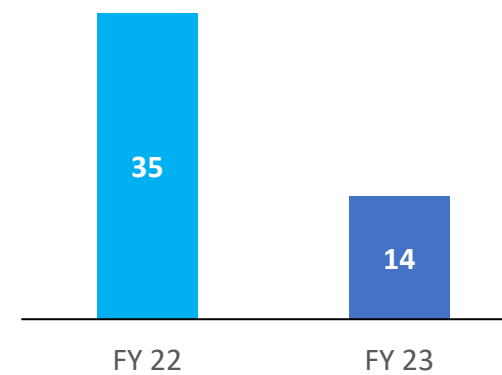
Capital Employed (₹ In Crores)



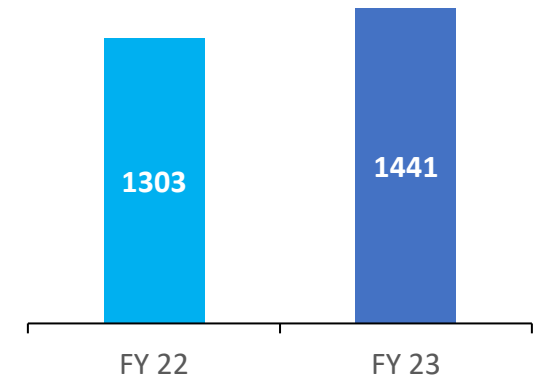
Cash and Cash Equivalents (₹ In Crores)



RoCE (%)



Net Worth (₹ In Crores)



BIRD'S-EYE VIEW

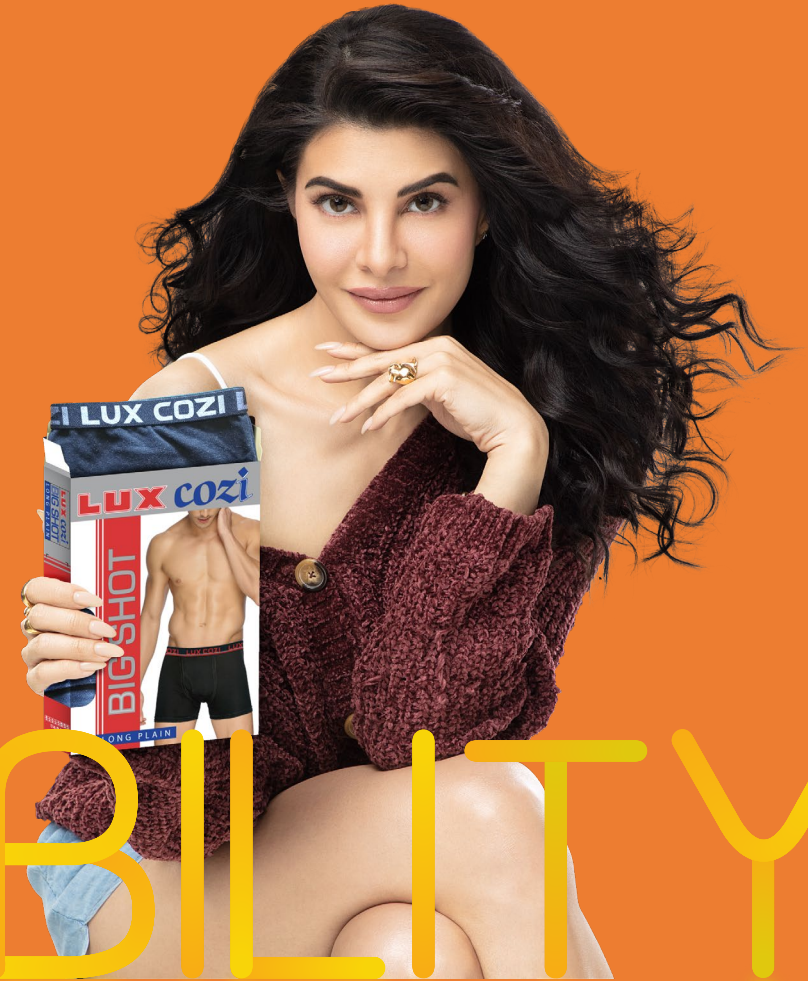
Category	Year Ended				
	NSV Mar'23 (in ₹ crores)	NSV Mar'22 (in ₹ crores)	Sales Growth	Volume Growth	ASP Growth
Premium	349	309	12.8%	5.2%	7.3%
Mid- Premium	1225	1184	3.5%	1.2%	2.2%
Economy	788	790	-0.3%	-6.3%	6.5%
Total	2362	2283	3.4%	-2.1%	5.7%

CONSOLIDATED CASH FLOW STATEMENT

In ₹ crore

Cash Flow	Mar'23	Mar'22
Net Cash flow from/ (used in) Operations	180.82	(228.47)
Cash flow from / (used in) investing activities	(88.46)	43.80
Cash flow from / (used in) in financing activities	(117.66)	152.43
Net increase / (decrease) in cash and cash equivalents	(25.30)	(32.24)
Cash and cash equivalents at the end of the period	27.15	52.45
Add: Investments lying in the closing date	106.66	81.48
Closing Gross Cash Balance	133.81	133.93
Borrowings as on Closing Date	247.87	338.60

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SUSTAINABILITY

REINFORCING OUR ESG COMMITMENT



- Collaborated with Churchgate Partners to implement ESG
- Provide more transparency in disclosures regarding Environment, Social and Governance related issues
- Guided by the principles to make a difference in society by giving back in equal measures
- Recognizing the need for sustained progress of society to pursue long-term goals that are beneficial for the community

ESG Public Profile

View ESG details of Lux Industries



CONTINUING SUSTAINABILITY COMMITMENT



Action

Our products are made of 100% natural fibre and we use recyclable packaging

Many suppliers manufacture exclusively for us

Manufacturing locally and maximising local sourcing

Embedding sustainability and circularity across the value chain

Social commitment includes sustainability and inclusive growth



Impact

Hygienic products and reduced environmental impact

Consistent product quality and employment generation

Boosting local economy and well-being in the society

Including sourcing sustainable raw materials, manufacturing processes, supply chain and waste management

Including sustainable raw materials; enhanced workforce management and greater community reach



WIDENING COMMUNITY IMPACT

Supporting economically backward people through various measures such as by building rest rooms

Addressing environment sustainability

Supporting 180+ elderly people

Focusing on animal welfare benefiting 500+ cows

Making available safe drinking water benefiting 1 lakh+ people

Promotion of traditional art & culture

Encourage Sports activities

Providing Education to underprivileged Children

₹6.80 crores

Actual CSR expenditure for YE Mar'23

2,000+

Trees planted in 35-40 acres of land



SPREADING THE SEEDS OF KNOWLEDGE

Commitment for support of ₹ 2 crores towards the building of a free residential school project for over 1000+ unprivileged girls in Joka, WB has been fulfilled.

Built the Saraswati Sishu Mandir School at Bali (Murshidabad)

Contributed ₹ 1.5 crores to Dhanuka Dhunseri Foundation for promotion of Chess activities

Partnership and consultation with NGOs, registered trusts and Section 8 companies

100 +

Students enrolled



Saraswati Sishu Mandir School at Bali (Murshidabad)

ENSURING WELL-BEING FOR ALL

Supporting Pushpawati Singhania Hospital & Research Institute

Reaching healthcare through focused intervention areas (kidney ailments, cardiovascular diseases, cancer among others)

Engaging in providing treatment to ailing population

Providing OPD and IPD services to the economically underprivileged

200+

Bed facility

1,500+

Liver transplants



Tata Medical Center Operation Theatre

Developed one Operation Theatre at Tata Medical Center by contributing ₹ 2.50 crore including infrastructure and medical equipment's

Help Us Help Them Foundation – School Project



Current Status of Project



Proposed

REDUCING ENVIRONMENTAL FOOTPRINT

1 MW rooftop solar power plant at Dankuni (West Bengal) unit

Process technology help save water

Substantial electricity cost reduction

Reducing carbon footprint

Energy-saving LED lighting systems in our plants save energy

30-40% of our total power requirements met through renewable sources

Installations of Capacitors to reduce plant load

2 lakh litre

Water saved every day through state-of-the-art processing technology



Rooftop solar power plant at Dankuni unit



Safe Harbor

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