



**Procter & Gamble Hygiene
and Health Care Limited**
CIN: L24239MH1964PLC012971
Registered Office:
P&G Plaza
Cardinal Gracias Road, Chakala
Andheri (E), Mumbai 400 099
Tel: (91-22) 2826 6000
Fax: (91-22) 2826 7337
Website: in.pg.com

September 22, 2023

To,
The Corporate Relations Department
The BSE Limited
Department of Corporate Services
Phiroze Jeejeebhoy Towers,
Dalal Street, Mumbai - 400001
Scrip Code: PGHH/500459

To,
The Listing Department
The National Stock Exchange of India Limited
Exchange Plaza, Plot No. C/1, G Block,
Bandra Kurla Complex, Bandra (East),
Mumbai - 400051

Dear Sir / Madam,

Sub: Analysts/Institutional Investors - outcome - presentation and recording

This has reference to the intimation dated September 05, 2023 with respect to the virtual connect with analysts/ institutional investors held today, Friday, September 22, 2023 at 9:00 a.m. (IST).

Pursuant to Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, enclosed herewith is the presentation made at above meeting with analysts/ institutional investors.

Further, a link to the recording of the meeting is made available on the website of the Company at: <https://in.pg.com/india-investors/pghh/shareholder-info/info/#meetings>

This is for your record and appropriate dissemination.

Thanking you.

Yours faithfully,

For Procter & Gamble Hygiene and Health Care Limited

Flavia Machado
Authorized Signatory



Procter & Gamble Hygiene and Health Care Ltd.

Investor and Analyst Presentation
22 September 2023

Disclaimer

This communication, except for the historical data, may contain forward-looking statements, including words, phrases, numbers that set forth anticipated results based on management's current plans and assumptions. Forward-looking statements are based on current expectations and assumptions, which are subject to risks and uncertainties that may cause results to differ materially from those expressed or implied in those statements. The Company cautions investors that any such forward-looking statements are not guarantees of future performance and that actual events or results may differ materially from those statements. Actual events or results may differ materially because of factors that affect international businesses and global economic conditions, as well as matters specific to the Company and the markets it serves. The Company undertakes no obligation to update these statements whether as a result of new information, future events or otherwise, except to the extent required by law.



**FORCE FOR
GROWTH**



**FORCE FOR
GOOD**

INTEGRATED GROWTH STRATEGY

BRINGING CONSUMER CENTRICITY TO LIFE

| Baby | Fem | Family | Fabric | Home | Hair | SPC | Grooming | Oral | PHC |
|----------------|----------------|------------------------|-----------------------|------------------------|--------------------------|--------------------------------|------------------------------|----------------------------------|----------------------------------|
| Pampers WIP | always SWAN | Downy Afta Lorox | Dove Afta Lorox | Downy Afta Lorox | PANTENE Afta Lorox | SK-II OLAY Afta Lorox | Gillette Veritas BRAUN | Crest Oral-B Afta Lorox | MyOut DayOut Afta Lorox |

PORTFOLIO

PERFORMANCE DRIVES BRAND CHOICE



ORGANIZATION

EMPOWERED • AGILE ACCOUNTABLE



SUPERIORITY

TO WIN WITH CONSUMERS



CONSTRUCTIVE DISRUPTION

ACROSS OUR BUSINESS



PRODUCTIVITY

TO FUEL INVESTMENTS





| Baby | Fem | Family | Fabric | Home | Hair | SPC | Grooming | Oral | PHC |
|---------|--------|---------|--------|----------|------------------|-----------|----------|--------|----------------|
| Pampers | always | Bounty | Tide | DAWN | Head & Shoulders | SK-II | Gillette | Crest | VICKS |
| Luvs | TAMIX | Charmin | Downy | FAIRY | PANTENE | OLAY | Venus | Oral-B | NyQuil DayQuil |
| | | Puffs | ARIEL | esencia | Rejoice 飘柔 | Old Spice | BRAUN | | M&A |
| | | Gain | lenor | Softener | elaboro | Sesquid | | | Pepito |
| | | | | | | Secret | | | Prilosec |

PORTFOLIO
PERFORMANCE DRIVES
BRAND CHOICE



FEMININE CARE



Choice Portfolio



Ultra Portfolio



Nights Portfolio

HEALTH CARE



Throat Drops



Multi symptom relief



Vicks Rubs & Inhaler



Sleep

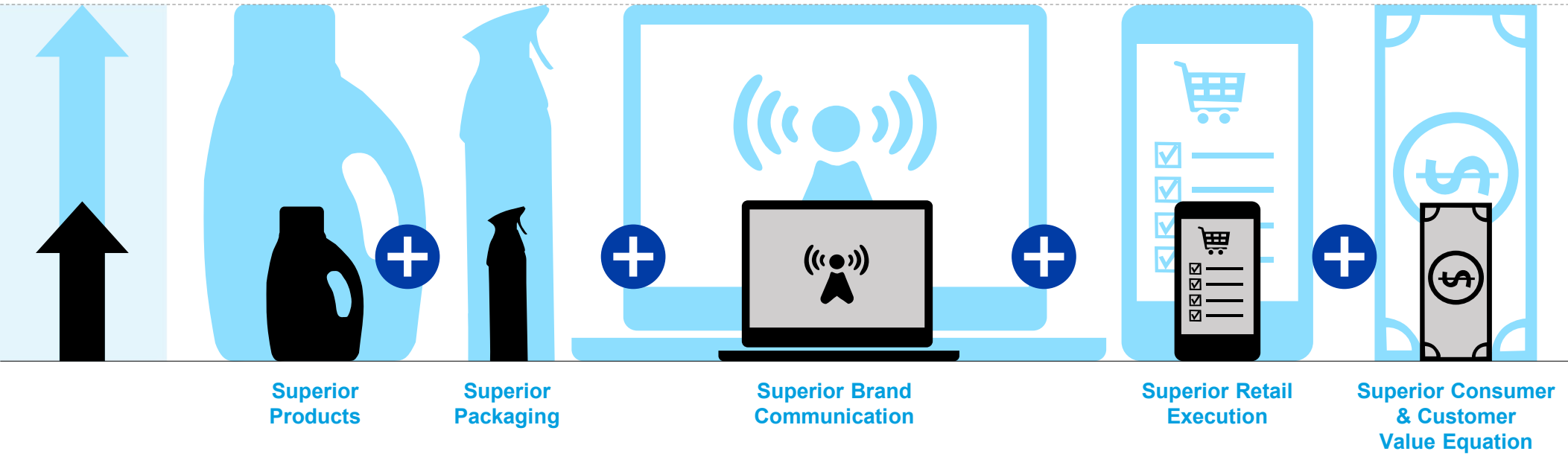


SUPERIORITY
TO WIN WITH CONSUMERS



SUPERIORITY TO WIN WITH CONSUMERS

*New Standard
Of Excellence*





**SUPERIOR
PRODUCTS**



**DELIVERING SUPERIOR CONSUMER EXPERIENCE THROUGH
EVOLVED BENEFITS**





**SUPERIOR BRAND
COMMUNICATION**



**एक
VICKS
असर**

हमेशा लेबल पढ़ें. निर्देश अनुसार ही इस्तेमाल करें. यदि लक्षण बने रहें,
तो अपने डॉक्टर से संपर्क करें.

VICKS
VapoRub
RELIEVES COUGH & COLD SYMPTOMS

**COMMUNICATION THAT IS TARGETED,
RELEVANT AND INSPIRING**



**SUPERIOR BRAND
COMMUNICATION**



whisper
choice

नो डर, दिन भर

₹ 40**

NEW
whisper
choice **XL**
ULTRA
4TIMES
SOAKING POWER
WITH MAGIC GEL

UP TO 100% STAIN PROTECTION*

6 PADS
XL

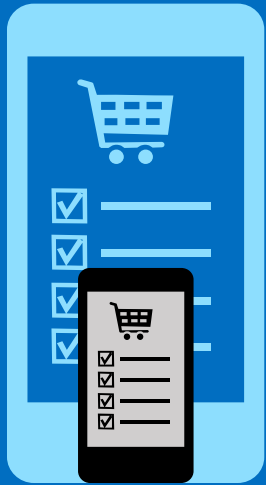
UP TO 100% STAIN PROTECTION*

UP TO 100% STAIN PROTECTION*

**MRP में सभी टैक्स शामिल हैं

No fear, all day long. Whisper

**COMMUNICATION THAT BRINGS THE
TECHNOLOGY TO LIFE**



SUPERIOR RETAIL EXECUTION





| | | | |
|-----------------|--|-------------------------------|--|
| LEAN INNOVATION | | BRAND BUILDING | |
| SUPPLY CHAIN | | DIGITIZATION & DATA ANALYTICS | |

**CONSTRUCTIVE
DISRUPTION**
TO FUTURE-PROOF
BUSINESS



DIGITAL TRANSFORMATION WITH AI/ML



**Cross-screen Media
Planning basis
consumer habit**



**Evolving Go-To-Market
to serve customers
and consumers better**



**Digitized Forecasting
for Optimized Supply
chain**

The P&G logo is displayed in white, italicized serif font inside a dark blue circular graphic that has a 3D effect with a lighter blue highlight on the top left.

PRODUCTIVITY
TO FUEL INVESTMENTS



PRODUCTIVITY INTEGRATED INTO THE STRATEGY

MATERIALS

MANUFACTURING

OVERHEAD

**AD SPEND &
PROMOTION**

**WORKING
CAPITAL**



Delivering Savings of ~₹105 Crore



ORGANIZATION
EMPOWERED • AGILE
ACCOUNTABLE



WE ARE UNIQUE AND WE ARE UNITED: THE BUSINESS OF BELONGING.



ORGANIZATION
EMPOWERED • AGILE
ACCOUNTABLE



PEOPLE



BRANDS



COMMUNITIES



PARTNERS

POSITIVELY IMPACTING THE WORKPLACE AND COMMUNITIES

P&G India rolls out initiative to support employees who are caregivers to children with disabilities, special needs

P&G to pay for infertility treatment expenses of employees

On track. P&G commits to digitally upskill 5 lakh women in five years

P&G India Is Fostering Inclusion For The LGBTQ+ Community

 WE ARE UNIQUE AND WE ARE UNITED:
THE BUSINESS OF BELONGING.

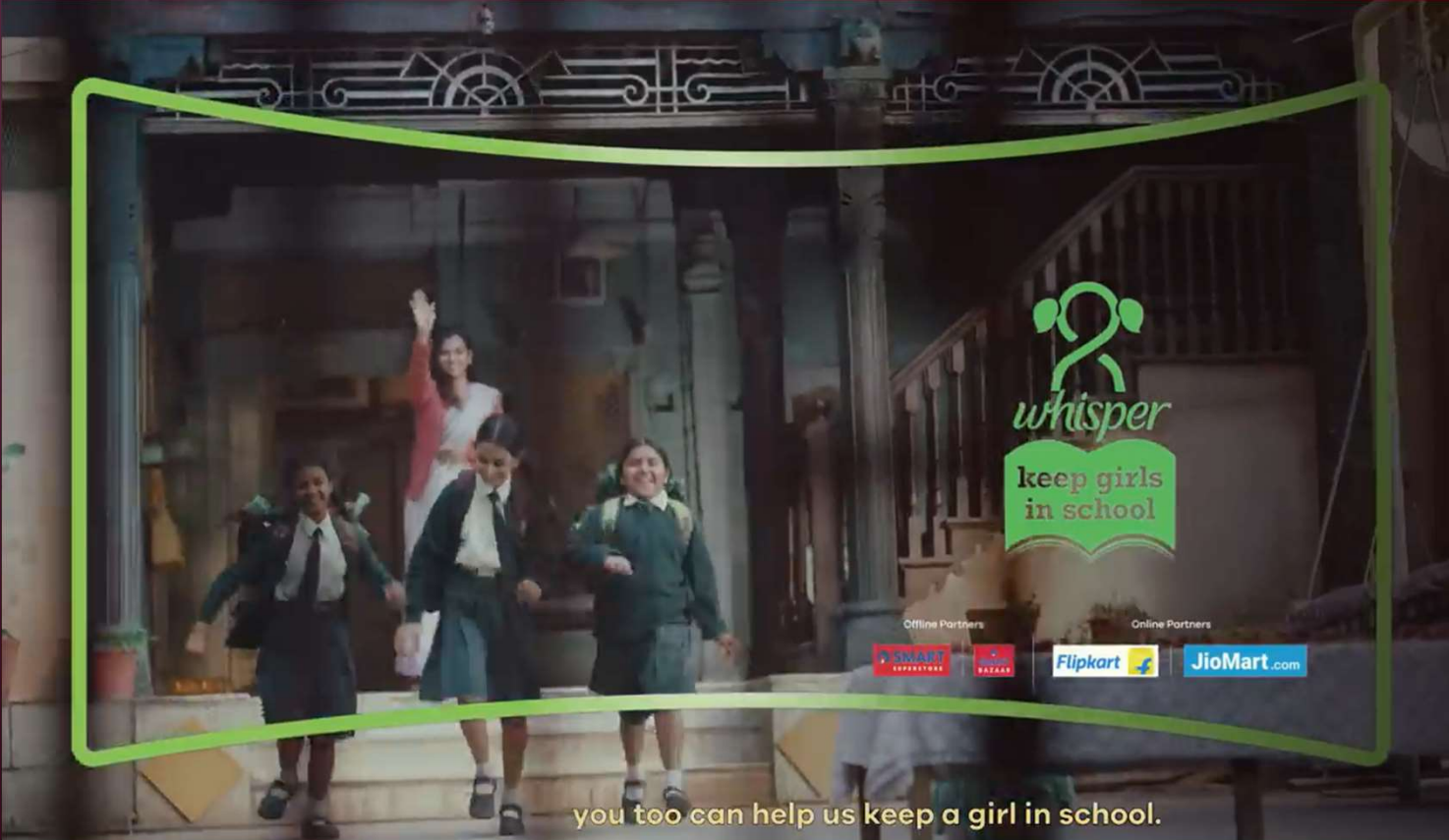


P&G Whisper and UNESCO collaborate to launch 'Spotlight Red'

Under the initiative #KeepGirlsInSchool, five teaching-learning modules were introduced to promote menstrual health and hygiene management.

Procter & Gamble India Bolsters Its Mental Well-Being Program For Employees At Workplace

LEVERAGING THE VOICE OF OUR BRANDS TO EMPOWER AND ENABLE



The advertisement features a scene of three schoolgirls in uniform running happily down the steps of a building entrance. A woman in a white and red outfit stands on the steps behind them, waving. The scene is framed by a green border. In the bottom right corner, there is a logo for 'whisper' with the tagline 'keep girls in school' inside a green speech bubble. Below this, there are logos for 'Offline Partners' (SARAFI SUPERSTORE and SARAFI) and 'Online Partners' (Flipkart and JioMart.com). At the bottom center, the text reads 'you too can help us keep a girl in school.'

whisper
keep girls
in school

Offline Partners

Online Partners

SARAFI SUPERSTORE SARAFI

Flipkart JioMart.com

you too can help us keep a girl in school.



Since
2005

Partners
13

Impacting Children
35+
Lakh

1

Enhancing Learning Environment

2

Improving Learning Outcomes

3

Empowering Marginalized Communities



INDIA-SUBCONTINENT ENVIRONMENTAL SUSTAINABILITY



Environmental sustainability is embedded in how we do business. It is core to our purpose of improving lives now and for generations to come

AMBITION 2030
ENABLE AND INSPIRE
POSITIVE IMPACT



NET ZERO 2040
IT'S OUR HOME



WATER POSITIVE FUTURE



Climate



Waste



Water



Nature



PLASTIC PACKAGING WASTE COLLECTION

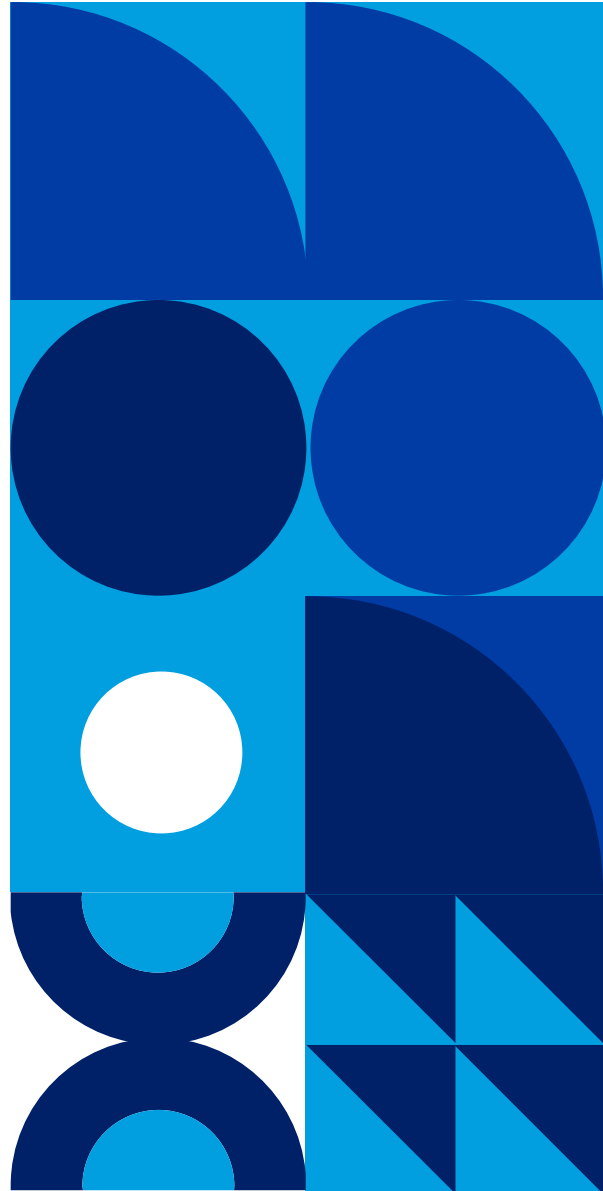
More than what we put out



BRANDS LEVERAGING PCR

100% for Vicks Cough Drop Jars

EXTERNAL RECOGNITION

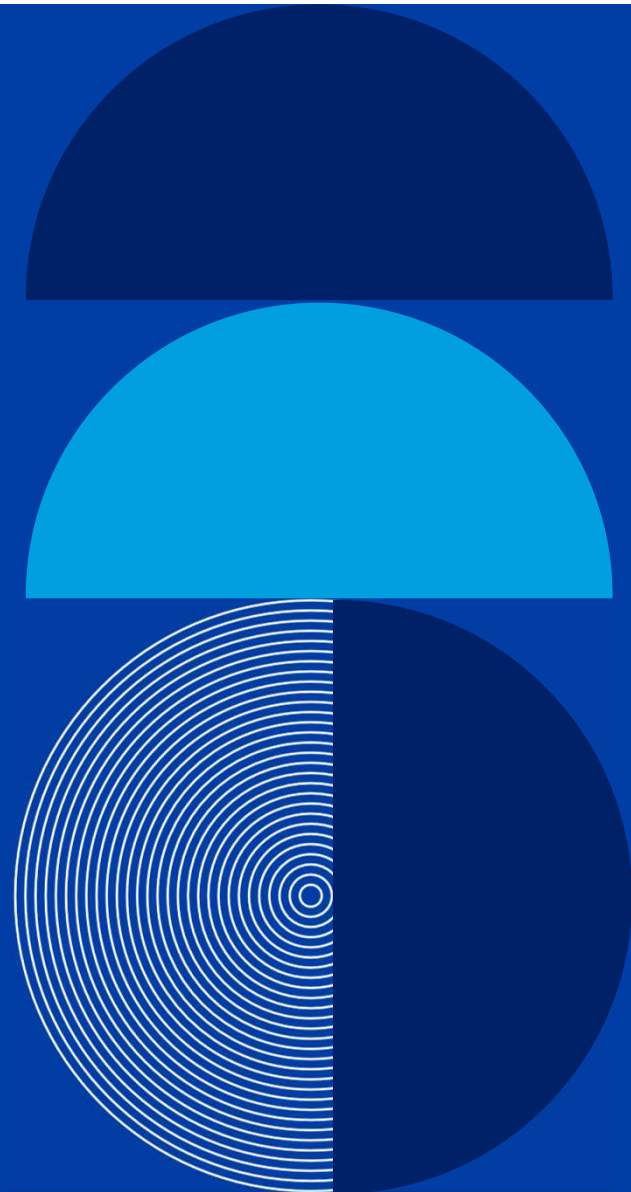


**FORCE FOR
GROWTH**



**FORCE FOR
GOOD**

OUR RESULTS



DELIVERED A RESILIENT YEAR

AMJ 2023 | Strongest Quarter in FY 23



Strong Growth across both Portfolios



Premiumization/ Pricing Advertising & Promotions optimization.



*OTI – One Time Impacts

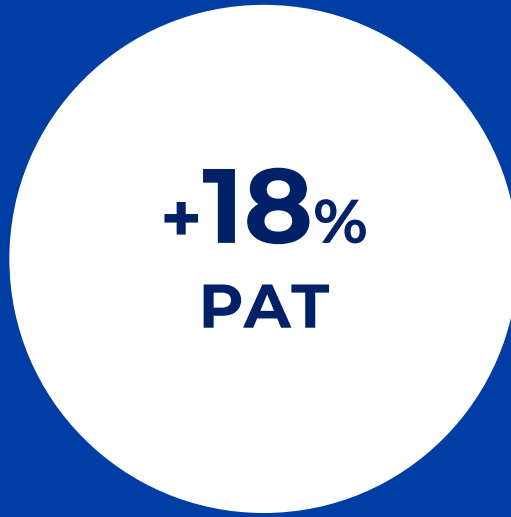
DELIVERED A RESILIENT YEAR

FY 2022-23

Strong operational results despite challenging macro & demand situation while maintaining share leadership



Strong Growth across both Portfolios

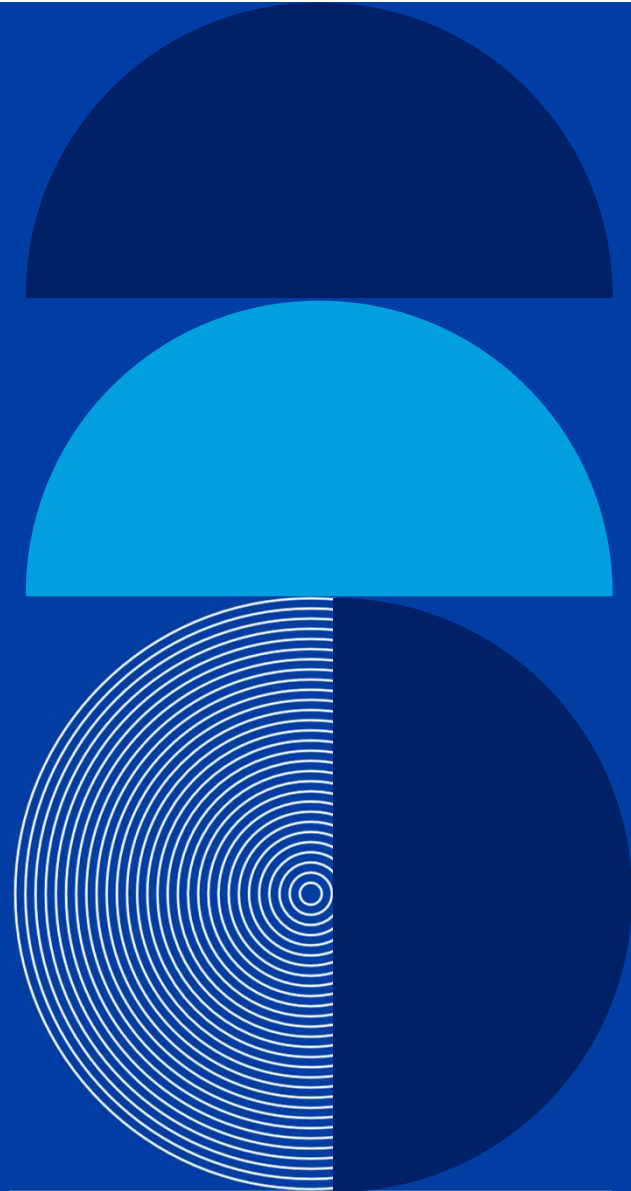


Operational Progress
PAT up +10% ex. one-time tax impacts



*OTI – One Time Impacts

LANDSCAPE



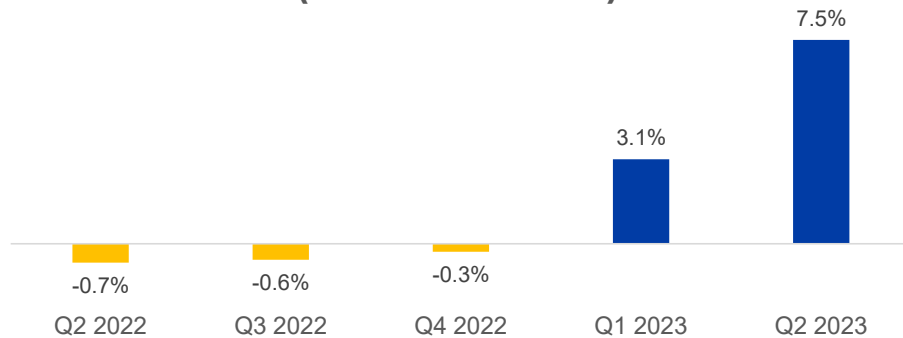
AMJ'23 vs YA – FASTEST MARKET GROWTH IN 6 QUARTERS

Driven by softening inflation & pick-up in rural consumption

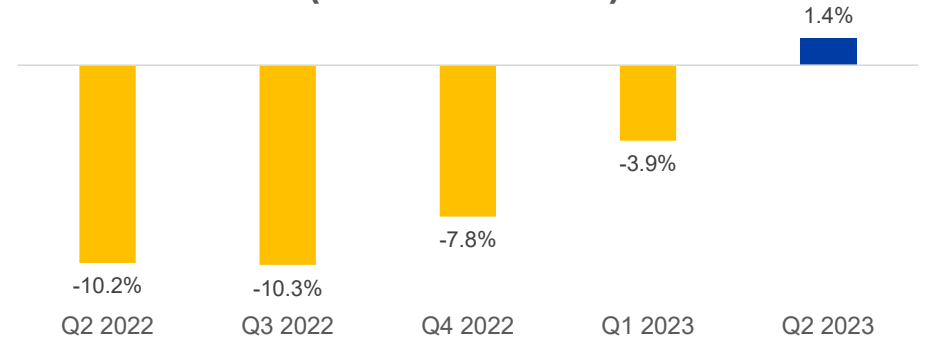
12% value growth driven by 7.5% consumption growth

Rural growth inflecting now – Growing vs YA (negative P2Y CAGR)

Consumption Drives FMCG Growth during AMJ
(% Volume Growth)



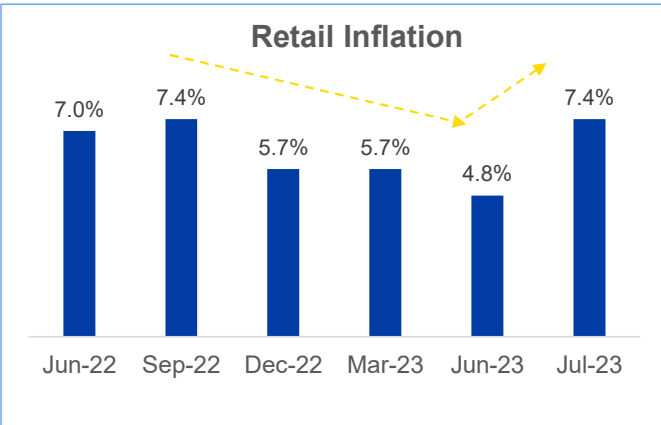
Non Food Demand Revives in Rural Markets
(% Volume Growth)



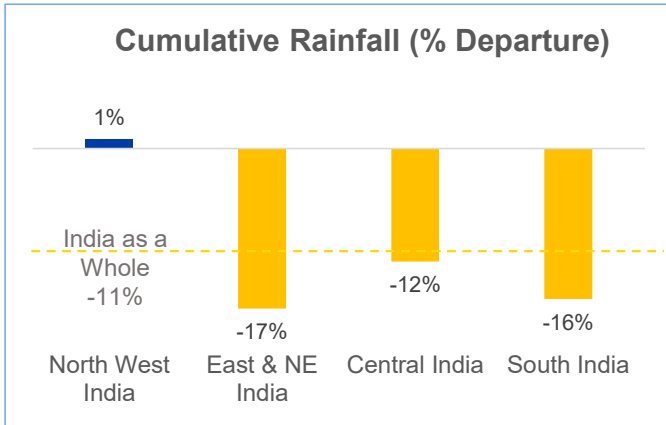
MARKET GROWTH OUTLOOK – CAUTIOUSLY OPTIMISTIC

Near Term Risks to Rural Demand Revival

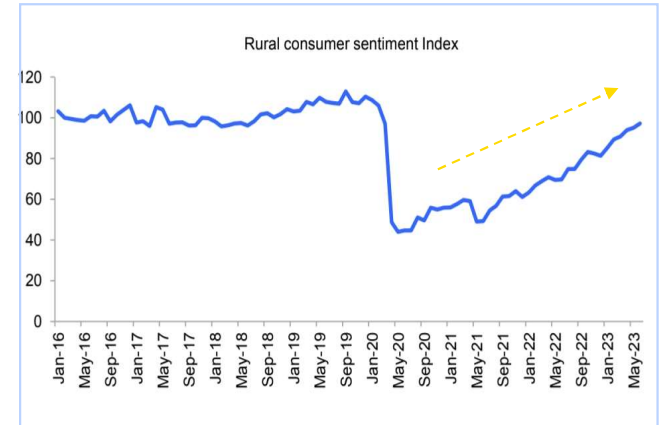
Pick up in retail inflation after sequential decline...



... and below average monsoons in August risking crop sowing..



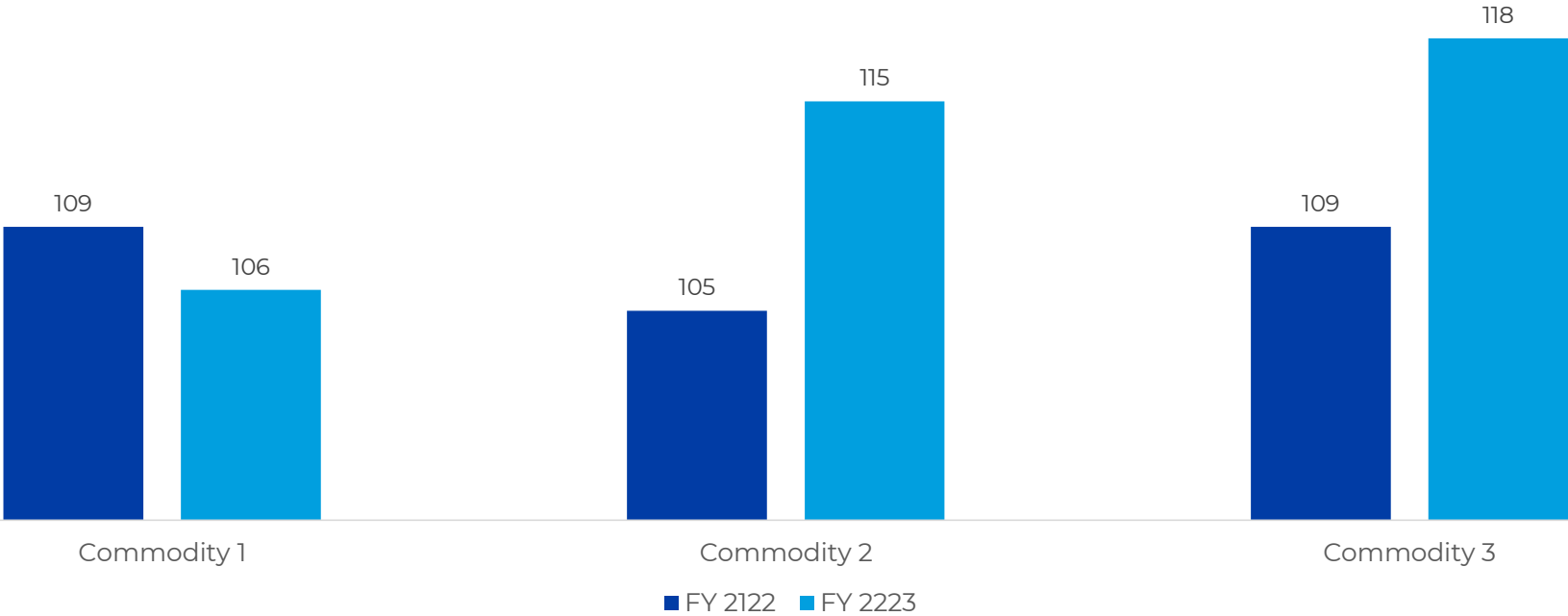
.. Presenting a risk to improving rural sentiments



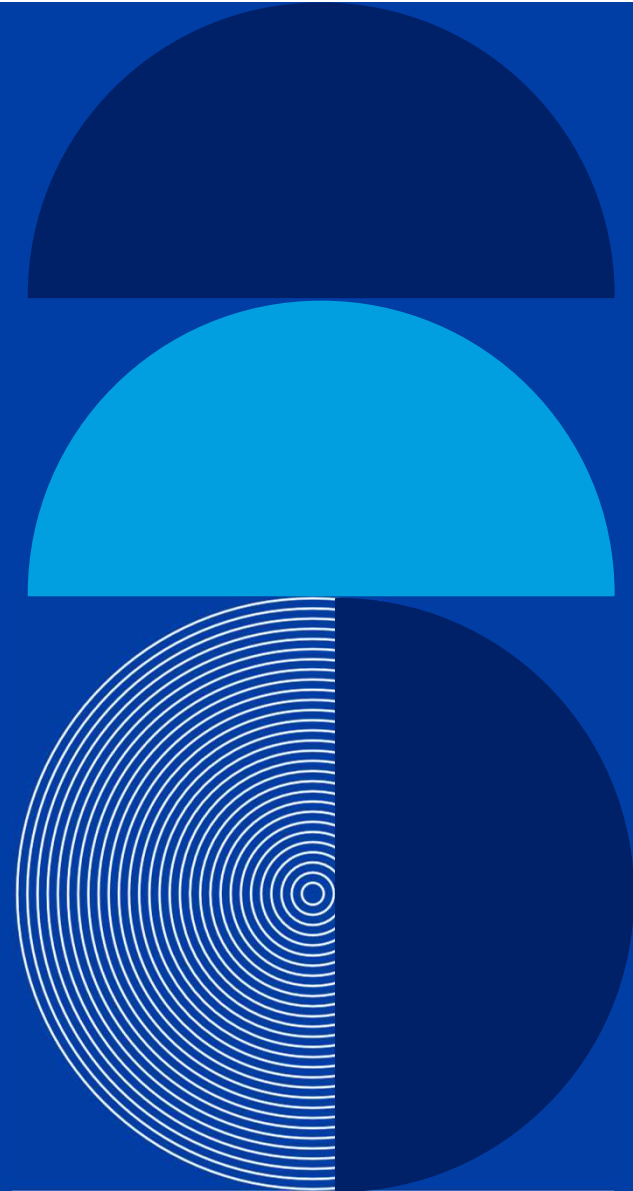
Source: Analyst Reports; IMD Data; News Articles

COMMODITY PRICES REMAIN ELEVATED

Commodity Inflation (Average Cost vs. Year Ago)



LONG TERM TRENDS



SUPERIOR AND SUSTAINED EXECUTION OVER P10Y

+9%
CAGR
Net Sales

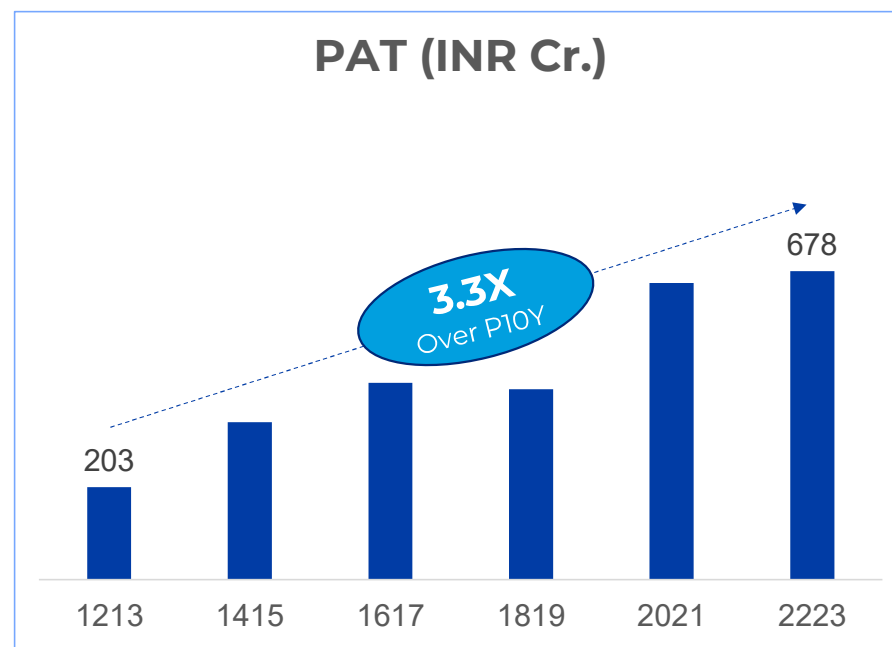
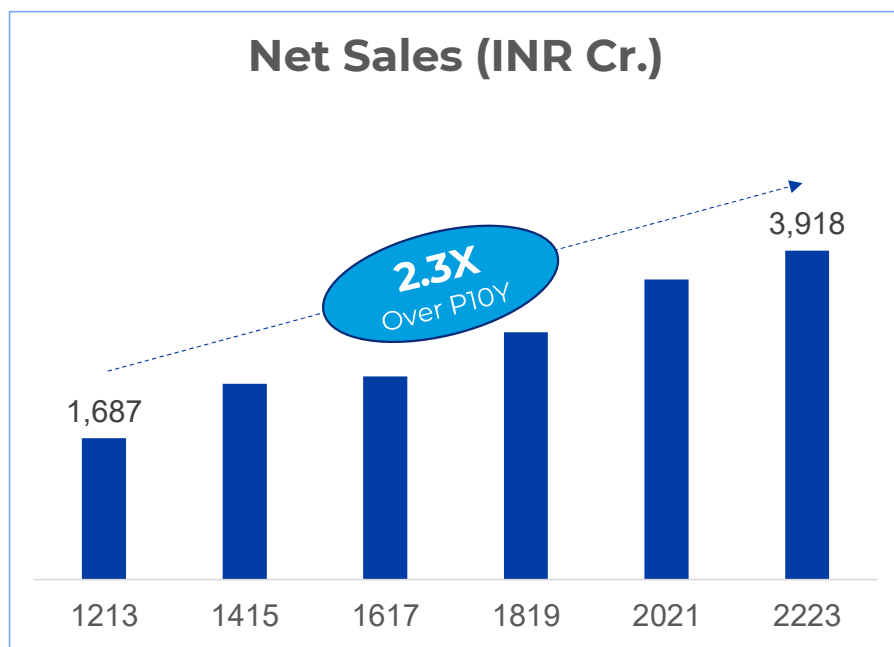
+13%
CAGR
PAT

+54%
Increase
In ROE



Note: 1) Basis Published results; 2) Net Sales refers to revenue from operations; 3) PAT Excluding OCI; 4) ROE = PAT/ Avg. Equity

SUPERIOR AND SUSTAINED EXECUTION OVER P10Y



Note: 1) Basis Published results; 2) Net Sales refers to revenue from operations; 3) PAT Excluding OCI; 4) PAT – Profit After Tax; OCI – Other Comprehensive Income

CREATING SIGNIFICANT SHAREHOLDER VALUE

- 20% CAGR in Stock Price over Past 10 Years vs. 12% for Nifty FMCG Index
- Consistent Dividend Payout Since Past ~3 Decades



Source: NSE; Yahoo Finance

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Q&A

