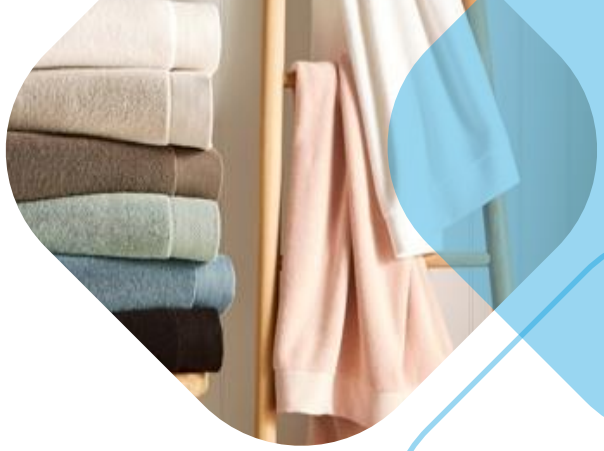
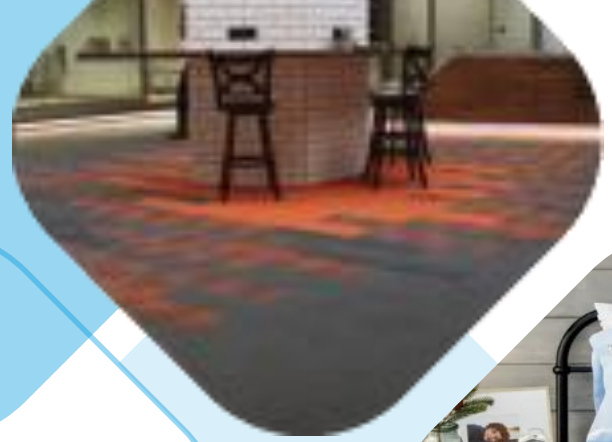
WELSPUN





Earnings Presentation

Welspun India Limited

Home Textile | Advance Textile | Flooring

Q3 FY21
January 2021

NSE: WELSPUNIND
Bloomberg: WLSI:IN
Reuters: WLSP.NS

Inside this **Presentation**

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Executive Summary

Diversified Brand and License Portfolio

Multipronged

E-Commerce

Strategy to accelerate growth & capture larger share of the fast-growing market

ESG Focused

organisation with well-defined principles, roadmap and targets

Strong **Emerging Businesses:**

- Flooring Solutions disrupting the world of flooring
- Advanced Textiles dealing with innovative product applications

Thought leader

in Home Textiles with robust innovation portfolio and more than 30 patents

#1 Ranking

in "Top 15 Home Textile Supplier Giants to USA"*

1 in 5 Towels &

1 in 9 Sheets

sold in the USA made by Welspun**

A certified

woman owned business

with ~25% women in a 20,000+ strong workforce

Note:

** Source: HTT Magazine*

*** Source: OTEXA data*

WELSPUN INDIA
HOME TEXTILES

Welspun India Ltd (WIL), part of $2.7 Bn Welspun Group, is a global leader in the Home Textiles landscape. With a strong distribution network in more than 50 countries and world-class, vertically-integrated manufacturing facilities located in India, Welspun is strategic partners with top global retailers.

WIL is differentiated by its strategy based on Branding, Innovation and Sustainability.

Management Commentary

Q3FY21

With emergence of homebody economy, there is a visible structural shift in consumers' spending for home products.

We delivered solid performance despite seasonally weak quarter, clocking highest ever quarterly revenue in the history of the company. Our Branded business delivered 28% growth YoY & Innovation portfolio contributed 45% to the total home textile export sales.

With increased focus on Innovation, ESG and fast growing E-Commerce channel we continue to advance our operating models to the rapidly changing business landscape while increasing our capacities to cater to the growing demand.

Ms. Dipali Goenka

CEO & Joint Managing Director, Welspun India Limited

Key Highlights

Q3FY21

Brands | **E-Commerce** | **Innovation**

Click the Icons to know more

Total Income up 28% YoY at ₹ 20,497 mn

Highest ever in a quarter

EBITDA up 75% YoY at ₹ 4,187 mn and Margin stood at 20.4%

Core business EBITDA up 48% YoY at ₹ 4,348 mn and Margin stood at 22.1%

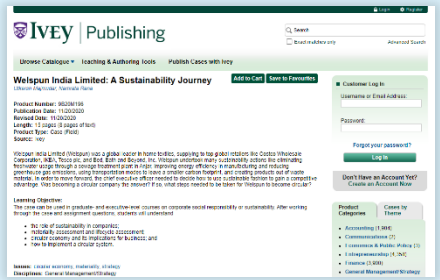
Branded business grew by 28% YoY and stood at ₹ 2,679 mn

Innovation (Export) products sales grew by 46% YoY

Emerging Business **(Advanced Textile & Flooring)** grew by 97% YoY

Net Debt reduced by ₹ 4,932 mn from 31st March 2020 and stood at ₹ 24,686 mn

Recent Awards & Recognition



Visit Website

Read More

Welspun's Sustainability journey now a case study on Ivey publishing website

Watch video

Read More

Welspun has been recognized by Walmart as its **trusted partner for 20 years** in their recent corporate announcement & HT leadership summit

Quarterly Highlights

Q3FY21

(₹ Million)

	Revenue^	EBITDA^	PBT	PAT	Cash Profit
	20,497	4,187	2,489	1,808	3,217
Growth (YoY)	27.7% ↑	75.3% ↑	308.8% ↑	147.0% ↑	97.4% ↑
Growth (QoQ)	2.9% ↑	3.4% ↑	(1.9)%	0.6% ↑	1.2% ↑
Margin (%) (y-o-y)		20.4% ↑	12.1% ↑	8.8% ↑	
Margin Expansion/Contraction (y-o-y)		554 bps	835 bps	426 bps	
EPS/CEPS				1.80	3.20

Note:
1. *Cash Profit = PBDT (before exceptionals) less Current Tax
2. Prior period figures are restated wherever necessary
3. ^Total Income & EBITDA includes prior period impact on reversal of MEIS benefit for ₹ 947 mn in Q3FY20

Quarterly Highlights (Cont.)

Q3FY21

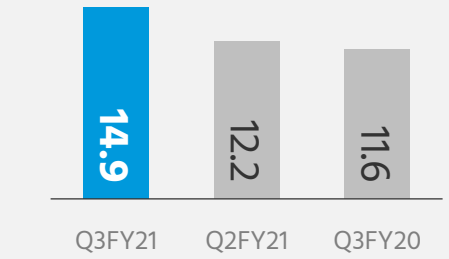
(₹ Million)

Particulars	31-Dec-20	31-Mar-20
Net Worth	**35,324**	**29,721**
Short Term Loans	16,374	17,717
Long Term Loans	14,633	16,704
of which Flooring Debt	6,799	6,378
Gross Debt	31,007	34,421
Cash & Cash Equiv.	6,321	4,803
Net Debt	**24,686**	**29,618**
Net Debt excluding Flooring debt	**17,887**	**23,240**
Total Assets	85,446	83,103

Net Debt reduced by ₹ 4,932 mn; excl. Flooring by ₹ 5,353 mn

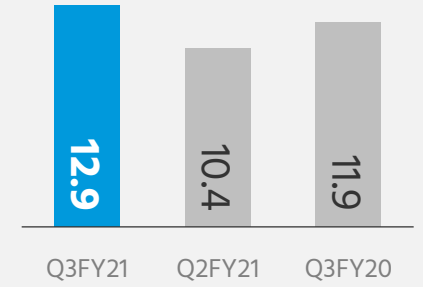
ROE

(In %)



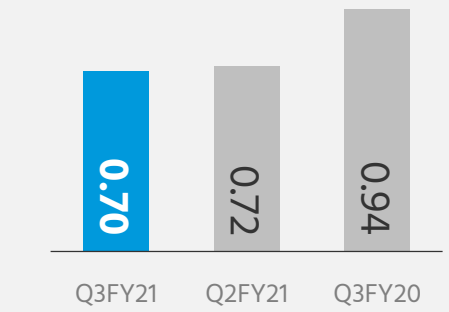
ROCE

(In %)



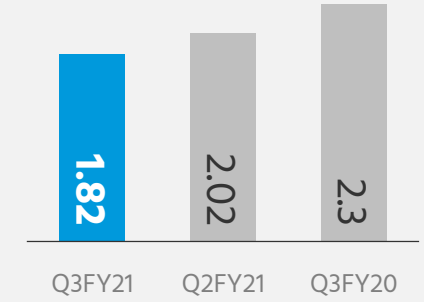
Net Debt / Equity

(x)



Net Debt / EBITDA

(x)



Note:
1. All quarterly chart figures are on TTM basis.

Quarterly Highlights (Cont.)

Q3FY21

(₹ Million)

Revenue	B2B			Branded#			
	Global*		Domestic	Global*		Domestic	
	Innovation	Others		Online	Offline	Online	Offline
Q3FY21	6,060	8,225	1,033	900	873	60	846
Sales Contribution (%)	*34%*	*46%*	*6%*	*5%*	*5%*	*0%*	*5%*
Q3FY20	4,440	7,553	700	762	609	27	701
Sales Contribution (%)	*30%*	*51%*	*5%*	*5%*	*4%*	*0%*	*5%*
Q2FY21	3,772	10,090	1,052	1,400	623	41	437
Sales Contribution (%)	*22%*	*58%*	*6%*	*8%*	*4%*	*0%*	*3%*
Growth YoY	*36%*	*9%*	*48%*	*18%*	*44%*	*119%*	*21%*
Growth QoQ	*61%*	*(18%)*	*(2%)*	*(36%)*	*40%*	*47%*	*93%*

22% YoY

Growth in **E-Com channel**

28% YoY

Growth in **Brand business**

21% YoY

Growth in **B2B business**

Note:
*Non-Domestic
#Includes Innovation
Revenue excludes Other Operating Income

Quarterly Highlights (Cont.)

Q3FY21

(₹ Million)

Revenue	Textiles Business			Other Businesses		
	HT - B2B	HT – Branded	HT - E-Comm	Advanced Textile	Flooring – B2B	Flooring – Branded
Q3FY21	13,855	1,509	960	738	725	210
Sales Contribution (%)	*77%*	*8%*	*5%*	*4%*	*4%*	*1%*
Q3FY20	11,945	1,208	789	618	131	102
Sales Contribution (%)	*81%*	*8%*	*5%*	*4%*	*1%*	*1%*
Q2FY21	13,584	919	1,441	730	601	141
Sales Contribution (%)	*78%*	*5%*	*8%*	*4%*	*4%*	*1%*
Growth YoY	*16%*	*25%*	*22%*	*20*	*455%*	*107%*
Growth QoQ	*2%*	*64%*	*(33%)*	*1%*	*21%*	*49%*

17% YoY

Growth in **Textile business**

97% YoY

Growth in **Other Businesses**

Note:
HT - Home Textile
HT-Branded includes sales from licensed brands
Revenue excludes Other Operating Income

Operational highlights

Manufacturing Capacity & Utilization

	Particulars	UOM	Annual Capacity	Q3FY21	Utilization (%)	Q2FY21	Q3FY20
Home Textile	Bath Linen	*MT*	80,000	19,717	99%	18,223	17,967
	Bed Linen	*Mn mtrs*	90	21.2	94%	18.9	14.5
	Rugs & Carpets	*Mn sq mtrs*	10	2.6	105%	2.0	2.0

	Particulars	UOM	Annual Capacity	Q3FY21	Utilization (%)	Q2FY21	Q3FY20
Advanced Textile	Spunlace	*MT*	9,930	2,147	86%	2,429	2,088
	Needle Punch	*MT*	3,411	369	43%	261	391
	Wet Wipes	*Mn Packs*	79.4	4.4	22%	6.0	2.7

	Particulars	UOM	Annual Capacity		Q3FY21	Utilisation (%)	Q2FY21
			Expected*	Operational			
Flooring	Soft Flooring	*Mn sq mtrs*	16.3	7.5#	0.16	8%	0.13
	Hard Flooring		10.7	2.7@	0.50	74%	0.20

Note:
*Expected Capacity at Full Capex | @ The same has increased to 5.4 in January 2021 | # The same will increase to 16.3 operationally based on business needs by making small investment in balancing equipment
During Q3FY20 the flooring plant was in stabilization stage

Enhancing capacity; catering to growing demand

- Rise of homebody economy & focus on hygiene driving increased consumption of Home textile products
- Enhancing our capacity through de-bottlenecking & rebalancing facilities to cater to this demand
- Capital light expansion in the areas of processing, cut & sew etc.

Towels

80,000 MT
Current Annual Capacity

85,400 MT
*Revised Annual Capacity

7%
Starting Q1 FY22 E

Bed Linen

90 Mn. Meters
Current Annual Capacity

108 Mn. Meters
*Revised Annual Capacity

20%
Starting Q2 FY22 E

Rugs & Carpets

10 Mn. Sq. Meters
Current Annual Capacity

18 Mn. Sq. Meters
*Revised Annual Capacity

80 %
Starting Q2 & Q3 FY22 E

HOME TEXTILE:

- Capacity expansion at Vapi and Anjar
- Expected investment of around ₹ 2,250 mn over FY21 & FY22
- Benefits will start accruing from as early as Q1 FY22 and revenue potential from second year ~ ₹ 12,000 mn

ADVANCED TEXTILE:

- Disinfectant wipes line to commence production in February 2021 & Spunlace expansion to commence operations by September 2021
- Out of the ₹ 4,957 mn project announced earlier, ₹ 1,961 mn has been deferred
- Potential topline: ~ ₹ 6,000 mn by FY23

FLOORING:

- Hard flooring capacity doubled in January 2021
- Further doubling of capacity of Hard Flooring by Q2FY22

Quarterly Profit & Loss

(₹ Million)

Particulars	Q3 FY21	Q3 FY20^	YoY Change	Q2 FY21	QoQ Change	9M FY21	9M FY20^	YoY Change	FY20
Total Income	**20,497**	**16,049**	**27.7%**	**19,926**	**2.9%**	**52,511**	**51,721**	**1.5%**	**68,362**
EBITDA	**4,187**	**2,389**	**75.3%**	**4,048**	**3.4%**	**10,616**	**10,135**	**4.7%**	**13,098**
EBITDA Margin (%)	**20.4%**	**14.9%**	***554 bps***	**20.3%**	***11 bps***	***20.2%***	**19.6%**	***62 bps***	**19.2%**
Finance Cost	559	455	22.8%	362	54.5%	1333	1,165	14.5%	1,777
Depreciation	1,139	1,325	(14.0%)	1,149	(0.8%)	3,394	3,564	(4.8%)	4,811
PBT (before exceptional)	2,489	609	308.8%	2,537	(1.9%)	5,889	5,406	8.9%	6,510
PAT (After Minority Interest)	**1,808**	**732**	**147.0%**	**1,797**	**0.6%**	**4,096**	**4,218**	**(2.9%)**	**5,074**
Cash Profit*	3,217	1,629	97.4%	3,179	1.2%	8,043	7,741	3.9%	9,702
EPS (₹)	**1.80**	**0.73**	**147.0%**	**1.79**	**0.6%**	**4.08**	**4.20**	**(2.9%)**	**5.05**

Note:
1. *Cash Profit = PBDT (before exceptionals) less Current Tax
2. Prior period figures are restated wherever necessary
3. ^Total Income & EBITDA includes prior period impact on reversal of MEIS benefit for ₹ 947 mn in Q3FY20 and for ₹ 109 mn in 9MFY20

Quarterly Segment Results

(₹ Million)

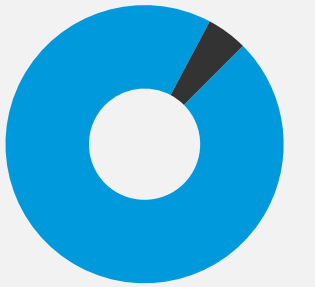
Particulars	Q3 FY21	Q3 FY20^	YoY Change	Q2 FY21	QoQ Change
Home Textile					
Revenue	19,672	15,490	27.0%	19,242	2.2%
EBITDA	4,348	2,947	47.6%	4,215	3.2%
EBITDA Margin (%)	22.1%	19.0%	*308 bps*	21.9%	*20 bps*

(₹ Million)

Particulars	Q3 FY21	Q3 FY20	YoY Change	Q2 FY21	QoQ Change
Flooring					
Revenue	977	218	347.9%	772	26.7%
EBITDA	(240)	(545)	-	(295)	-

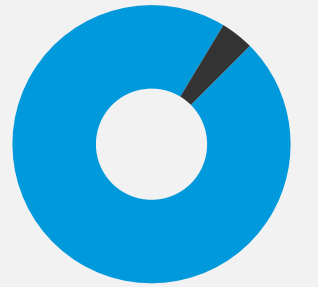
Revenue Segmentation

Q3 FY21



Q3 FY20

Q2 FY21



Legend

- Home Textile
- Flooring

Note:
1. ^Total Income & EBITDA includes prior period impact on reversal of MEIS benefit for ₹ 947 mn in Q3FY20

Welspun Experience Centre, Hyderabad

Summary of **Financial Statements**

Profit & Loss Summary

(₹ Million)

Particulars	FY17	FY18	FY19	FY20	9M FY21
Total Income	**67,211**	**61,318**	**66,084**	**68,362**	**52,511**
Growth %	11.8%	-8.8%	7.8%	3.4%	1.5%
EBITDA	**16,639**	**12,046**	**11,467**	**13,098**	**10,616**
EBITDA Margin	**24.8%**	**19.6%**	**17.4%**	**19.2%**	**20.2%**
Depreciation	5,054	5,042	4,358	4,811	3,394
Finance cost	1,583	1,408	1,593	1,777	1,333
PBT (Before exceptional)	10,003	5,597	5,516	6,510	5,889
Exceptional Items	(4,648)	-	(2,647)	434	-
PAT (After Minority Interest)	**3,576**	**3,850**	**2,098**	**5,074**	**4,096**
Cash Profit*	9,131	9,413	8,977	9,702	8,043
EPS (₹)	**3.56**	**3.83**	**2.09**	**5.05**	**4.08**

Note:
1. *Cash Profit = PBDT (before exceptionals) less Current Tax
2. Prior period figures are restated wherever necessary

Balance Sheet Summary

(₹ Million)

Particulars	31-Mar-17	31-Mar-18	31-Mar-19	31-Mar-20	31-Dec-20
Net Worth	**23,971**	**26,057**	**27,793**	**29,721**	**35,324**
Short Term Loans	11,721	12,580	14,080	17,717	16,374
Long Term Loans	21,393	20,228	19,024	16,704	14,633
of which Flooring Debt	-	-	*2,870*	*6,378*	*6,799*
Gross Debt	**33,114**	**32,807**	**33,104**	**34,421**	**31,007**
Cash & Cash Equiv.	2,725	2,538	2,821	4,803	6,321
Net Debt	30,389	30,269	30,283	29,618	24,686
Net Debt excluding Flooring debt	**30,389**	**30,269**	**27,412**	**23,240**	**17,887**
Capital Employed*	61,259	62,962	65,456	68,825	71,838
Net Fixed Assets (incl CWIP)^	35,713	33,641	36,154	38,105	37,062
Net Current Assets	20,114	23,734	22,210	21,828	24,149
Total Assets	73,283	72,249	77,423	83,103	85,446

Core business Net Debt reduced by ₹12,382 mn from 31st March 18

Note:
*Capital Employed = Net worth + Gross Debt + Other long term liabilities | ^Net current assets does not include Cash & cash equivalents

Ratios Summary

		FY17	FY18	FY19	FY20	TTM
Solvency ratios	Net Debt/Equity	1.27	1.16	1.09	1.00	0.70
	Net Debt/EBITDA	1.83	2.51	2.64	2.26	1.82
	EBIT/Interest	7.32	4.98	4.46	4.66	4.59
Operational ratios	Current ratio	1.41	1.42	1.25	1.19	1.36
	Fixed asset turnover	1.86	1.80	1.81	1.77	1.87
	Total asset turnover	0.91	0.84	0.84	0.81	0.81
	Inventory days	70	79	75	83	78
	Debtor days	53	56	60	59	64
	Payable days	41	39	39	49	48
	Cash conversion cycle	82	96	95	93	94
Return ratios	ROE	29.6%	15.4%	15.2%	16.1%	14.9%
	ROCE (Pre-tax)	19.3%	11.3%	10.9%	12.3%	12.9%

Continuous improvement in Net Debt / Equity & Net Debt / EBITDA

Note:

- ROCE (pre-tax) excluding Welspun Flooring is 13.9% for FY20 & 14.8% on TTM basis
- ROCE = EBIT / Average Capital Employed & ROE = Net Profit / Average Net worth
- Total asset turnover = Sales/ (Fixed assets + Gross current assets)
- FY17, FY19 & FY20 Return Ratios figures adjusted for Exceptional item

The ESG way: Encompassing all stakeholders

Welspun is going through a major transformation where we are embedding sustainability and circularity in every realm of our value chain.

We are striving to be the absolute benchmark and global leader in the use of ESG framework and compliance to sustainable practices. We are enabling a sustainable and circular approach in all our operations, be it sourcing of raw materials, manufacturing, supply chain and waste recycling; We have built a roadmap on Sustainability for WIL that enlists our goals under Sustainability till 2030.

ESG WORLD

Independent review of Welspun India's performance across 170+ ESG (Environmental, Social & Governance) parameters

Click here for more details

Environmental

- Implemented the ISO 140001 EMS at both manufacturing sites
- "SPUN" business is empowering women in rural communities earn livelihood by making handicraft goods from Factory textile scrap - thus circular economy
- Setup 30-MLD STP to collect sewage from 3 municipalities and use the treated sewage instead of Freshwater in production operations
- Successfully completed trials to use Hazardous sludge from ETP as alternate fuel in Power Plant (coal replacement)

Social

- Focus on inclusion and gender diversity – large segment of women workers in Cut-&-Sew operations
- Welspun Foundation is established to run the CSR and philanthropic programs
- Welspun CSR initiatives are based on 3E's – Environment & Health, Education, Empowerment
- Contributed to COVID-19 relief efforts
- Working with Cotton Farmers to enable them to grow sustainable forms of Cotton

Governance

- Initiated putting in place a broad Enterprise Risk Management framework
- Implemented the ACCESS module in SAP to enable access of relevant data to authorized users
- Ethics framework is in place
- Compliance management tool is in place
- Innovation and intellectual property is encouraged as evidenced in 30+ patents

ESG Journey till date & Way Forward ...

Journey Till Date

Featured among Top 100 Sustainable companies in India by ET-Futurescape

100,000+ acres
Landbank of sustainable cotton farming

7,000+ billion
Liters of water recycled annually

5,5000+ T Co_2
Saved annually through energy conservation

260,000+ trees
Planted for improving Green cover

85%
Carton usage with recycled paper

Welspun is rated **"Low Risk"** on ESG factors by one of the **top ESG rating agency**

Welspun's Sustainability journey now a case study on Ivey publishing website

Way Forward

	Sustainalytics	DJSI (S&P)	MSCI ESG Leaders Index
ESG 2020	Available by Jun-21	Available by Mar-21	Available by Sep-21

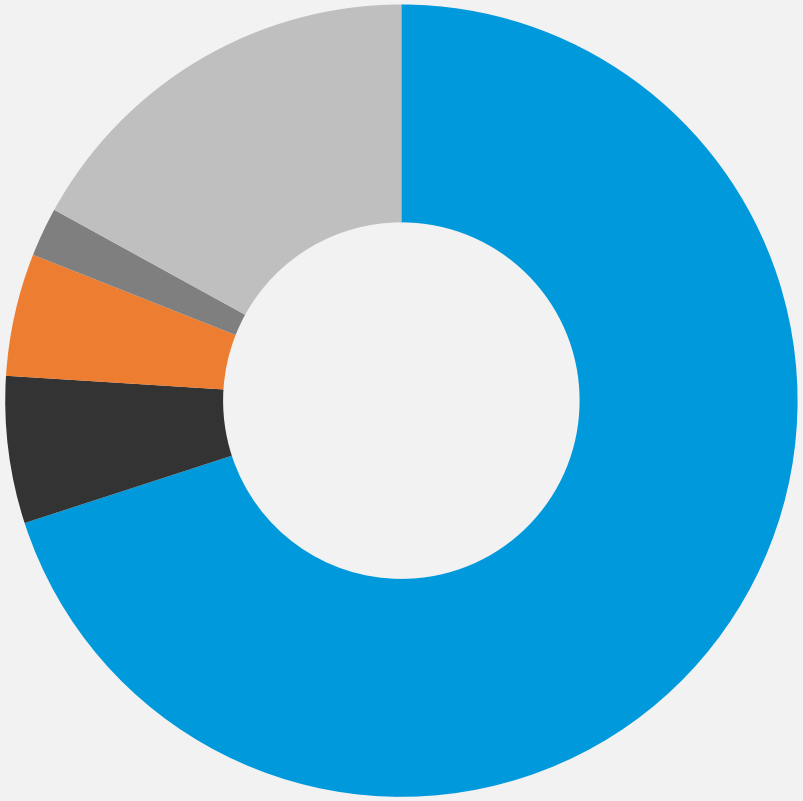
Conducting Gap-assessment and identifying measures to move to "Negligible Risk" rating

Sustainability targets

Aspects	2015-16	2018-19	Goal 2022	Goal 2025	Goal 2030	YTD Dec 20
Carbon Neutral	0%	10% RE	20% RE	50% RE	100% RE	**7%**
100% Sustainable RM - Cotton	11%	23%	35%	50%	100%	**29%**
Fresh Water Positive	78 KL/ MT	18 KL/ MT	10 KL/MT	5 KL/MT	0	**10 KL/MT**
Zero waste out of site (ETP chemical sludge – landfill)	1,342 MT	1,019 MT	500 MT	0	0	**850 MT**
Impacting 1 million lives in CSV	62,848	109,787	300,000	500,000	1,000,000	**160,729**
5-Lakh farmers growing sustainable cotton	0	7,000	130,000	250,000	500,000	**13,029**

Share Holding Summary

Shareholding Pattern (Dec 2020)



Promoter Group	70%
FIIS	6%
Mutual Funds/AIF	5%
Banks and Insurance Co's	2%
Public	17%

Top Institutional Shareholders
DSP Mutual Fund
L&T Mutual Mund
Aditya Birla Mutual Fund
LIC of India
Vanguard
Dimensional
State Street

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Annexure

Brands – Evolving into a dominant retail player

← Back

Owned Brands

India

SPACES BED • BATH • RUGS

WELSPUN FLOORING

WELSPUN

Global

Christy ENGLAND

LIVING BY Christy

KINGSLEY

WelLivingHome BY WELSPUN

WELHOME™

Licensed Brands

India

THE CHAMPIONSHIPS WIMBLEDON

MARVEL

ILLUMINATION presents DESPICABLE ME MINION MADE

Disney

Global

MARTHA STEWART

SCOTT LIVING

THE CHAMPIONSHIPS WIMBLEDON

STAY WELL

American Cotton AMERICAN PRIDE IN EVERY THREAD

Brand Presence

Brand Presence: SPACES

- **2,300+** outlets | **200+** shop-in-shops | **400+** cities

Brand Presence: WELSPUN

- **3,600+** outlets | **50+** distributors | **57+** cities

Brands Highlights

SPACES

- 2nd most famous brand in premium category
- No 1 brand in shop-in-shops
- Best brand in home category at Myntra

WELSPUN

- 2nd most famous brand in the Home Linen mass-market category within 2 years of launch

E-Commerce – Multipronged strategy to drive growth

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Project WAVE
Accelerating E-Commerce growth

$100 Mn+
Target Revenue by FY23

3
Geographies in focus

US UK India

Target Annualized Share (%)

US	UK	India
70%	15% - 20%	7% - 10%

Ecommerce Channel Growth
Brand.com
Marketplaces
Retailer.com

Build & Grow Branded Business
Own Brand
License Brand

Robust Supply Chain
Inventory Planning
Network Design

Strong Technology Back-end
Tech-Stack: Middleware
PIM
Analytics – GC3

Right Organization
COE Org Model
Wave Academy
Capability

Notes:
- PIM –Product Information Management
- GC3 –Global Command & Control Centre
- COE –Center of Excellence

E-Commerce – (Contd.)

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Value	Earth Friendly	Health & Wellness	Fashion	Luxury
WELSPUN BASICS. ESSENTIAL HOME TEXTILES	WelHOME. BY WELSPUN { Textile Solutions for Better Living }		MARTHA STEWART M; SCOTT LIVING	Christy ENGLAND

Growth platforms
Marketplaces, D2C, Omni

Digital Marketing and Activation

Sharp Product Assortment

Capabilities

Organization & People	Brilliant Basics	Analytics led control tower
◆ Up skilling & Talent acquisition ◆ WAVE Academy	◆ Middleware technology ◆ Marketing automation	◆ Global Command and Control Center

Innovation – Our strong suite

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30 Unique patents

Filed globally

WINNER

CLARIVATE SOUTH AND SOUTH EAST ASIA INNOVATION AWARD 2020

Welspun India

has been recently recognized as the most 'Influential Innovators' at the Clarivate South and South East Asia Innovation Award 2020

Global

Collaborations with Top Universities, Technology Partners and Industry Associations

Key Innovations

HYGROCOTTON

Led to softer Towels, fluffier after wash, and temperature regulating sheets.

Our patented HYGROCOTTON is crafted with our patented spinning technology, producing yarn with a revolutionary hollow core.

WEL-TRAK

Patented traceability solution that tracks fibre from source to finished product.

WEL-TRAK is the most trusted traceability solution in home textiles supported by blockchain technology, it enhances trust, transparency through Digital and third-party verification.

Other Innovations

ORGANIC

Unique mechanism that provides wrinkle resist properties inherent to the product

NANOCARE

Patented construction provides superior allergy protection

DRYLON

This poly material is ultra soft to touch & dries super fast to create an ideal bath rug, sheets and towels

CHARCOAL

Charcoal woven into our fabrics provides natural odor control benefits