



INDUSTRIES LIMITED
(Formerly known as DOMS INDUSTRIES PVT. LTD.)

Ref. No. DIL/SE/24-25/65

Date: November 10, 2024

To,

The Manager
Corporate Relationship Department
BSE Limited
Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai - 400 001

The Manager
Listing Department
National Stock Exchange of India Limited
Exchange Plaza, Bandra Kurla Complex,
Bandra (East),
Mumbai - 400 051

BSE Symbol - DOMS
BSE Scrip Code - 544045

NSE Symbol - DOMS

Subject: Investor Presentation in relation to the Unaudited (Standalone and Consolidated) Financial Results for the quarter and six months ended September 30, 2024

Dear Sir/ Madam,

In continuation of our letter dated November 04, 2024, this is to inform that pursuant to Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, as amended, ('**SEBI LODR Regulations**'), please find enclosed herewith the Investor Presentation in relation to Unaudited (Standalone and Consolidated) Financial Results for the quarter and six months ended September 30, 2024.

The Investor Presentation is available on the website of the Company at www.domsindia.com.

This is for your information and records.

Thanking you,
Yours faithfully,
For DOMS Industries Limited

Mitesh Padia
Company Secretary and Compliance Officer
Membership No.: A58693

Encl.: As above

Registered Office:

J-19, Opp. Telephone Exchange,
G.I.D.C., Umbergaon- 396171,
Dist. Valsad, Gujarat, India.

Website:

www.domsindia.com

Corporate Office:

Plot No. 117, G.I.D.C., 52, Hector Expansion
Area, Umbergaon- 396171,
Dist. Valsad, Gujarat, India.

Tel: (+91) 7434888445 / 446

E-mail: info@domsindia.com

Mumbai Office:

17th Floor, C-Wing, Kailas Business Park,
Hiranandani Link Road, Vikhroli (W)
Mumbai- 400079, Maharashtra, India.

Tel: (+91) 7069028500 / 600

Email: asst.admin@domsindia.com



DOMS INDUSTRIES LIMITED

INVESTOR PRESENTATION

Q2 & H1 FY2025

DOMS – A Leading Holistic Creative Product Company



Products & Market Presence



8

Product Categories



4,200+

SKUs



28 States and 8 UTs

PAN India Presence



50+

Export Countries

Manufacturing



47+ acres/1.80+ mn sq.ft

Operations Area



16

Facilities across 4 Locations



11,500+

Workforce



44+ acres

Upcoming Facility Area

Distribution*



125+

Super Stockists



4,750+

Distributors



1,35,000+

Retail Outlets



750+

Sales Personnel

Note: All the datapoints are as of September 30, 2024 unless mentioned otherwise
Excluding Uniclan Distribution Network

 **Corporate Video Link : [Click Here](#)**



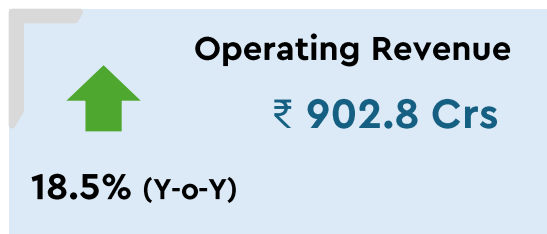
Q2 & H1 FY25 Performance Highlights



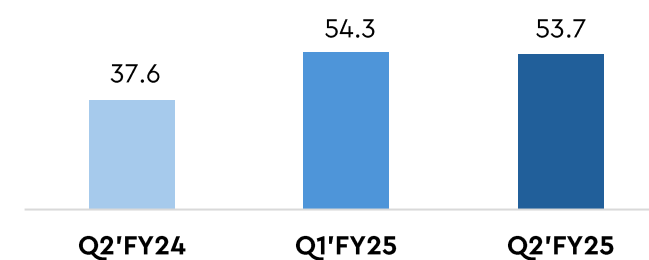
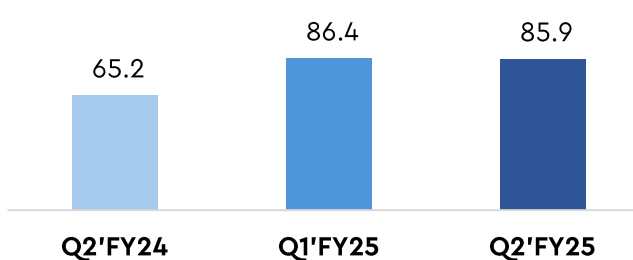
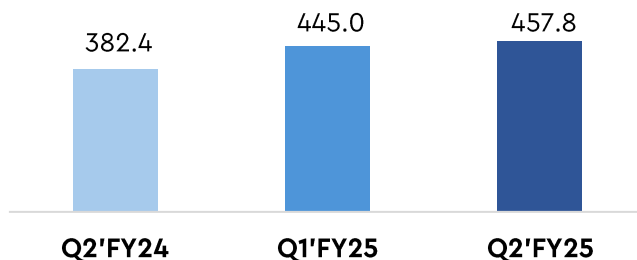
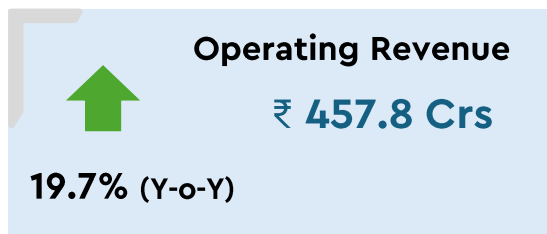
Q2 & H1 FY25 – Key Financial Highlights



H1'FY25



Q2'FY25



- **Resilient performance** for Q2'FY25 despite a challenging market environment
- Growth is largely driven by **increase in sales of writing pens, adhesives and kits & combination packs**
- **Positive impact of Uniclax acquisition** (September 16 to September 30) on revenue growth during the quarter

- **Completion of acquisition of 51.8% in Uniclan Healthcare Private Limited**
 - Growing company engaged in manufacturing and marketing of baby hygiene products – mainly diapers and wipes
 - Hosted annual Sales Conference at Jaipur which provided an opportunity to introduce the management, products & infrastructure of Uniclan to our network partners
- **Successful Capacity Expansion**
 - Increased capacity for mathematical Instrument boxes by 20%
 - Underway to increase capacity utilisation of the third pen plant to its maximum capacity of 1 million pens per day
 - Installed third automatic book manufacturing line in Pioneer Stationery increasing capacity by approximately 20%
- **New Product Launches Continue**
 - Introduction of new products like Highlighters and single use Marker Pens
 - New SKU introduction across almost all product categories including Ball Point Pens, Adhesives, Kits & Combination Packs, Scholastic Stationery, Scholastic Art and Fine Art
- **Increase in Retail Footprint:** Concentrated effort to increase our footprint leading to expansion of retail touchpoints from 1,25,000+ to 1,35,000+ stores.
- **Resumption of construction activity at the 44+ acres new land post monsoon:** Expect first building to be ready by Q3'FY26
- **Inauguration of Second DOMS Painting Studio at KidZania, NCR Region:** On the back of success of the Mumbai studio, launched second Painting studio in NCR Region to provide young consumers from that region, an immersive experience where they can explore various artistic roles with a special setting with DOMS products
- **Achieved Significant milestone of crossing 2 Mn subscribers on YouTube:** Reflecting growing trust of consumers who continue to engage with creative content, product showcases, and educational tutorials on the Company's Channel and in line with DOMS commitment to fostering a vibrant community of learners and artists while enhancing digital presence

Q2 & H1 FY25 – Consolidated P&L Snapshot

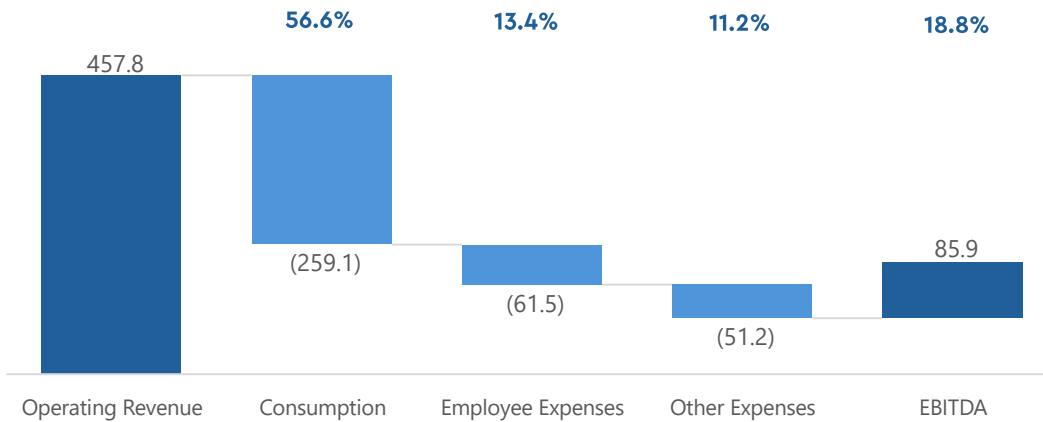


Particulars (in Crores)	Q2'FY25	Q2'FY24	Y-o-Y % Change	Q1'FY25	H1' FY25	H1' FY24	Y-o-Y % Change	FY24
Revenue from operations	457.8	382.4	19.7%	445.0	902.8	761.8	18.5%	153.7
Consumption Expenses	259.1	225.3		253.3	512.4	458.9		89.3
Gross Profit	198.7	157.1	26.5%	191.8	390.4	302.9	28.9%	64.4
<i>Gross Profit Margins (%)</i>	<i>43.4%</i>	<i>41.1%</i>		<i>43.1%</i>	<i>43.2%</i>	<i>39.8%</i>		<i>41.9%</i>
Employee Benefits Expense	61.5	53.3		61.1	122.6	102.5		21.3
Other Expenses	51.2	38.6		44.3	95.5	72.9		15.9
EBITDA	85.9	65.2	31.7%	86.4	172.3	127.4	35.2%	27.3
<i>EBITDA Margins (%)</i>	<i>18.8%</i>	<i>17.1%</i>		<i>19.4%</i>	<i>19.1%</i>	<i>16.7%</i>		<i>17.7%</i>
Other Income	6.1	1.2		5.6	11.6	2.4		1.0
Depreciation & Amortisation	16.1	11.8		14.8	30.9	22.8		5.1
EBIT	75.9	54.6	39.0%	77.2	153.1	107.1	42.9%	23.2
<i>EBIT Margins (%)</i>	<i>16.6%</i>	<i>14.3%</i>		<i>17.3%</i>	<i>17.0%</i>	<i>14.1%</i>		<i>15.1%</i>
Finance Costs	3.8	4.1		4.0	7.8	7.8		1.7
Share of Profit / (Loss) of Associates	-0.0	-0.0		0.0	-0.0	-0.1		-0.0
Profit Before Tax	72.1	50.4	42.9%	73.2	145.2	99.1	46.5%	21.4
<i>PBT Margins (%)</i>	<i>15.7%</i>	<i>13.2%</i>		<i>16.4%</i>	<i>16.1%</i>	<i>13.0%</i>		<i>14.0%</i>
Tax expenses	18.4	12.8		18.9	37.2	25.2		5.5
PAT	53.7	37.6	42.8%	54.3	108.0	73.9	46.1%	16.0
<i>PAT Margins (%)</i>	<i>11.7%</i>	<i>9.8%</i>		<i>12.2%</i>	<i>12.0%</i>	<i>9.7%</i>		<i>10.4%</i>

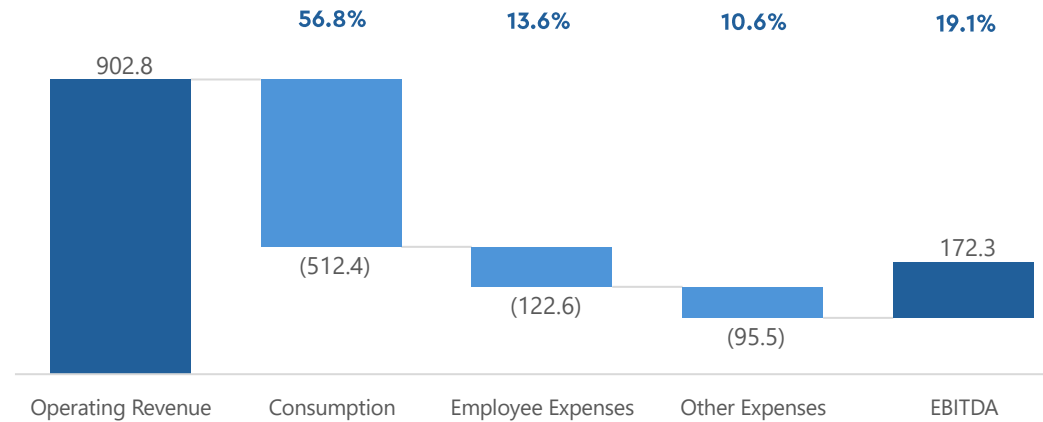
Q2 & H1'FY25 - Operational Profile



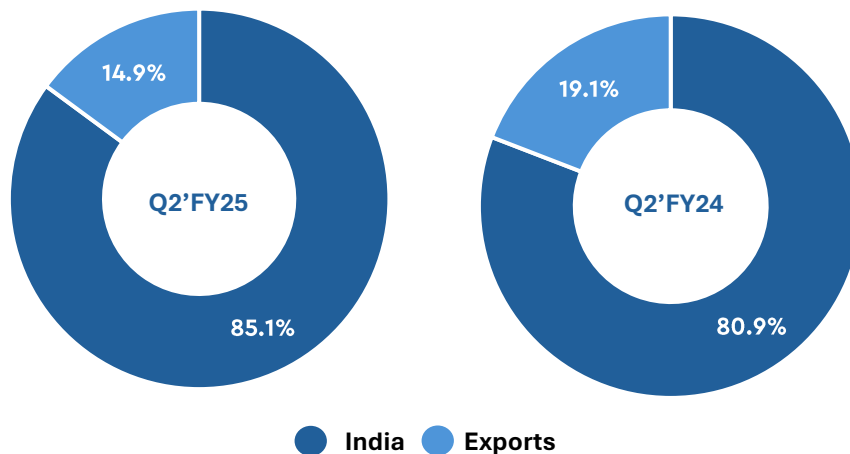
Q2'FY25 - Operational Analysis



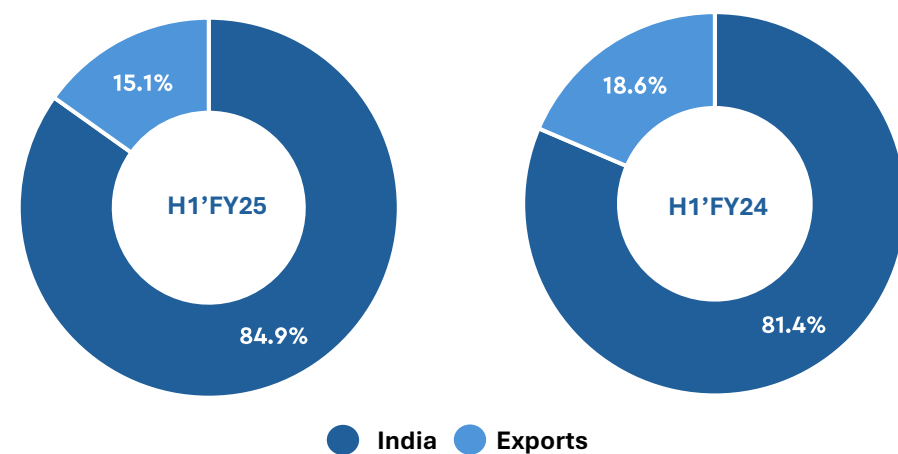
H1'FY25 - Operational Analysis



Q2 (Y-o-Y) - Geographical Sales Break up



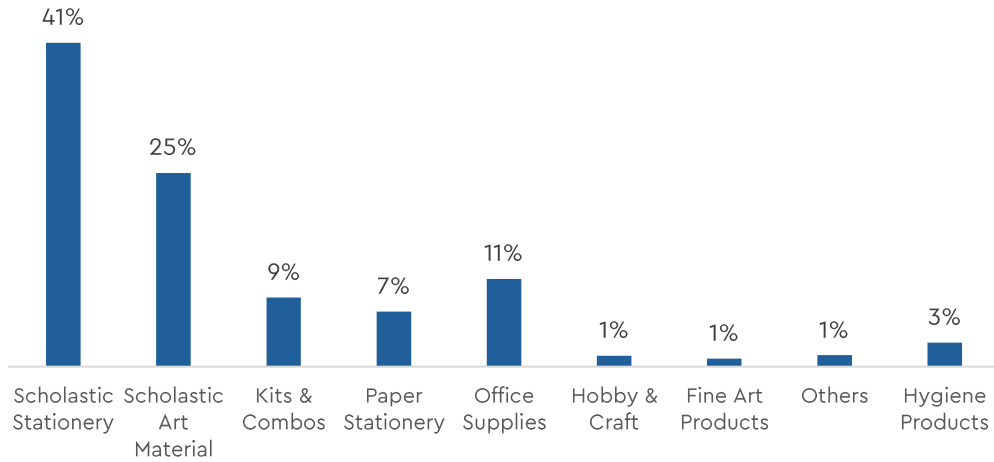
H1 (Y-o-Y) - Geographical Sales Break up



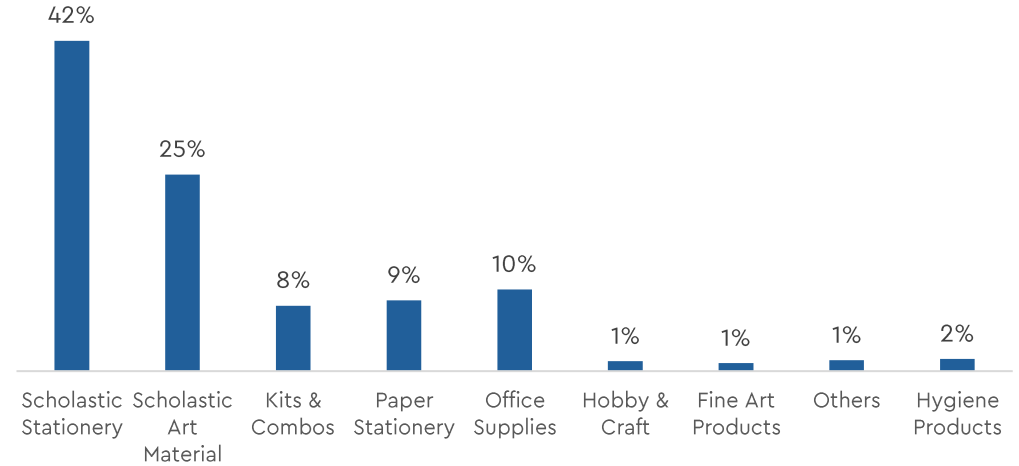
Q2 & H1'FY25 - Operational Profile



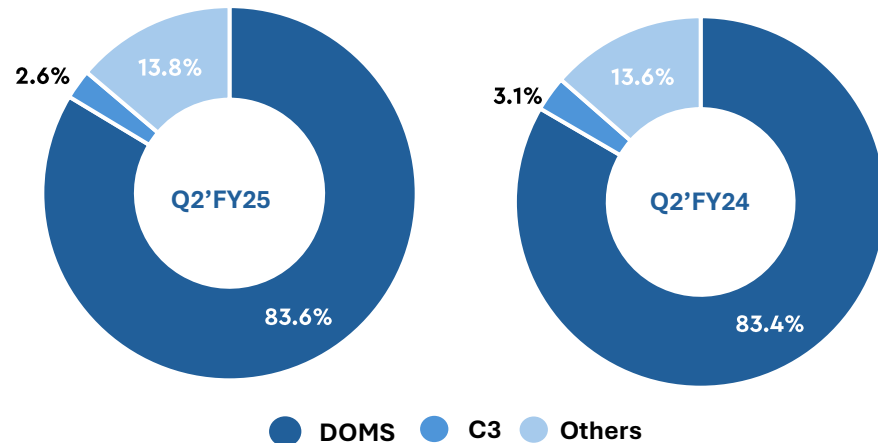
Q2'FY25 - Product Category wise Sales Break up



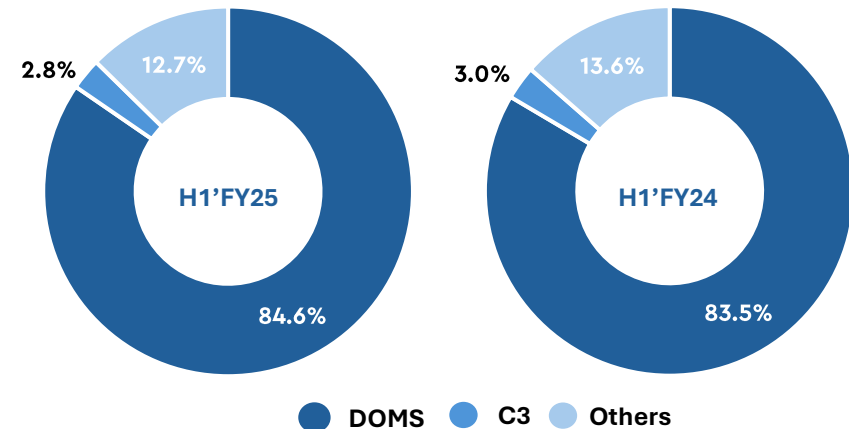
H1'FY25 - Product Category wise Sales Break up



Q2 (Y-o-Y) - Brand Wise Sales



H1 (Y-o-Y) - Brand Wise Sales





Recent Key Events & Engagements



Recent Acquisition – Uniclan Healthcare



Robust Infrastructure



Strong Product Portfolio



Experienced Management Team



Function	Strength
Production*	236
Sales	210
R&D and Quality	7
Finance, Admin, HR & Others	18
* Includes 200 contractual workers	

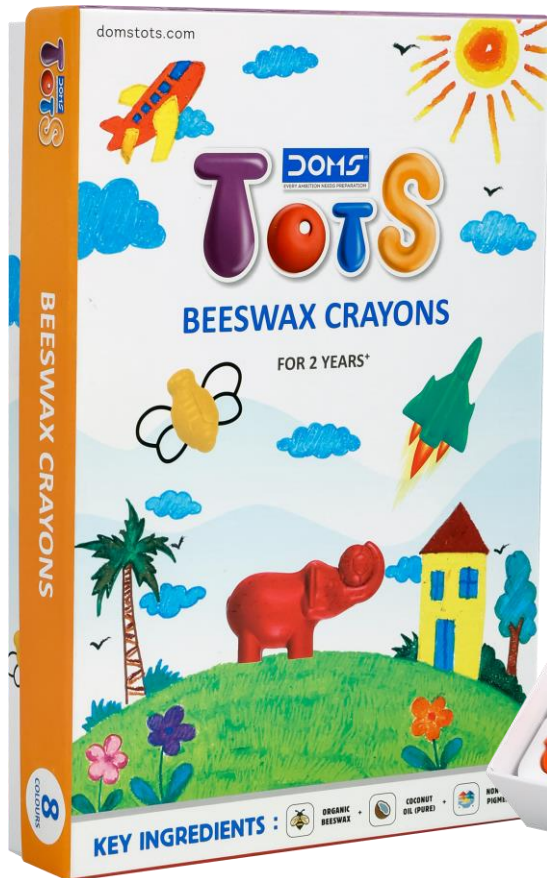
Recent Product Introductions



Recent Product Introductions



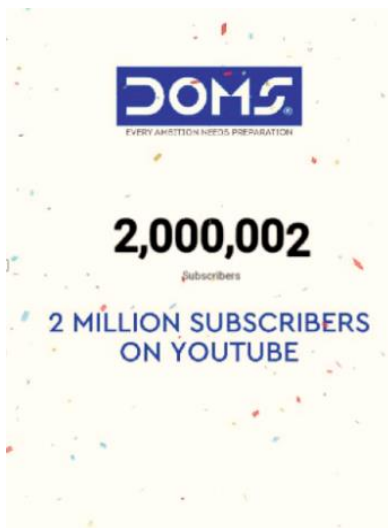
Recent Product Introductions



Recent Marketing Initiatives



Online Engagement & Product Videos



Branding & Product FSU's



Inxon – Superfast Pen Challenge, Lucknow

DOMS
EVERY AMBITION NEEDS PREPARATION

INXON ∞ Superfast Pen Challenge!

**TOP 3 FASTEST
ESSAY WRITERS WITH
MOST WORDS WIN
DOMS INXON PENS!**

Write an Essay
based on these
incredible features of
DOMS INXON PEN

FEATURES:

- Smoother ink flow due to the Vacuum Centrifuged technology
- Ergonomic soft grip for comfortable handling
- Elegant cap-clip combination for added style
- Unique foil design for a distinctive look
- Modern, premium design for professional use



Interactive Events – DOMS Painting Studio Kidzania, Mumbai



Recent Consumer Interactive Events



Medicos Associational Conference, Powai



On the Spot - Drawing Competition, Bengaluru



Factory Visits - Umergaon Factory





DOMS Industries Limited received the **“Award for Business Excellence 2024”** from the **AIICP, India-Italy Association for Cooperation and Partnership**.

The event took place in Rome on October 16, 2024 at the Confindustria (Confederation of Italian Industry) headquarters in the august presence of H.E. Vani Rao (Ambassador of India to Italy), Ms. Emma Marcegaglia (President AIICP), H.E. Antonio Enrico Bartoli (Ambassador of Italy to India), Mr. Sanjiv Puri (President CII – Confederation of Indian Industry) and representatives of major companies in India and Italy.

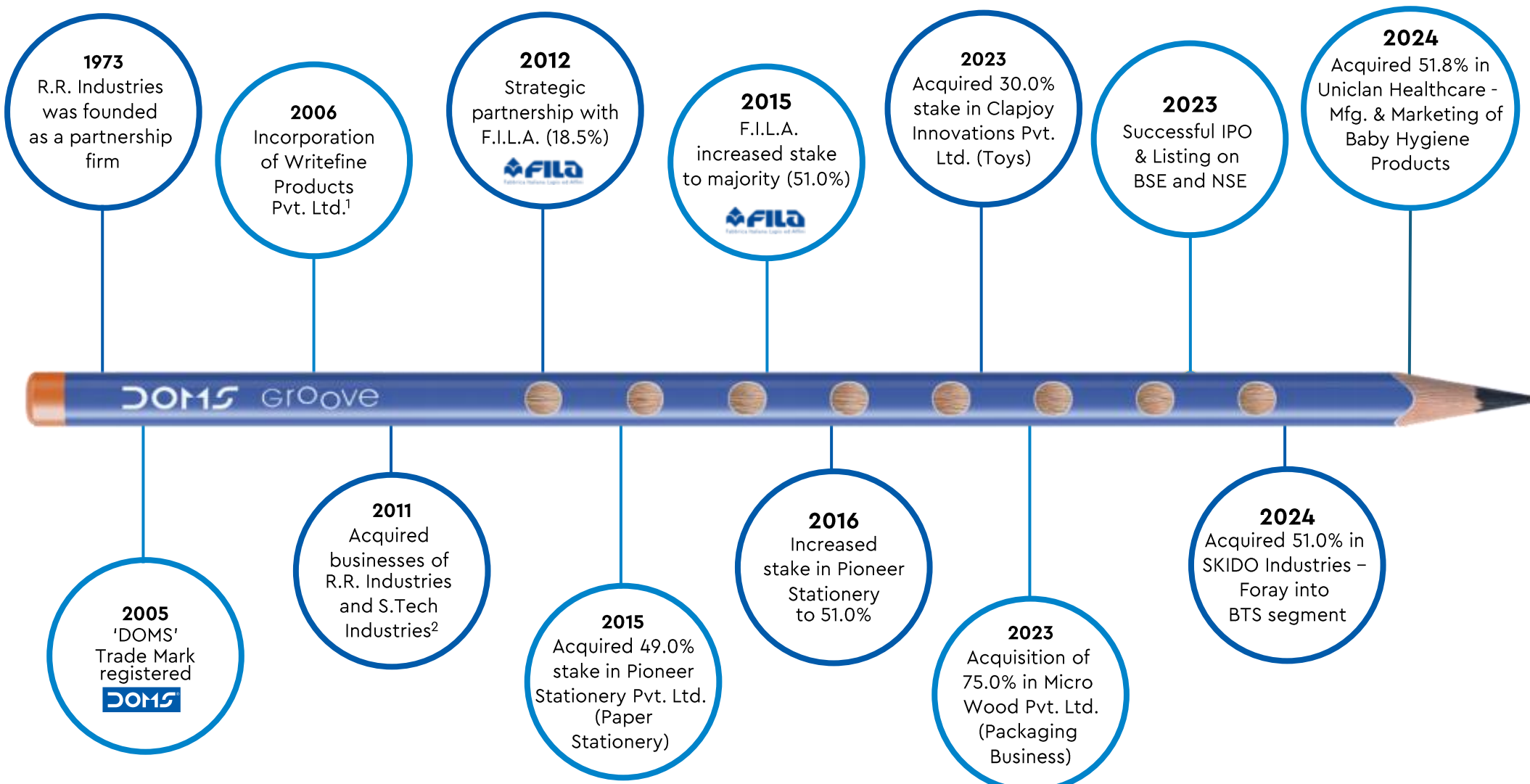
The AIICP Award for business Excellence 2024 was given to DOMS recognizing its emergence **as the largest disruptor in the Indian Stationery Market and on track to become one of the world’s leading companies in its sector**. Further, the **DOMS FILA partnership was highlighted as an example of strategic partnership for global success and expanded market reach**.



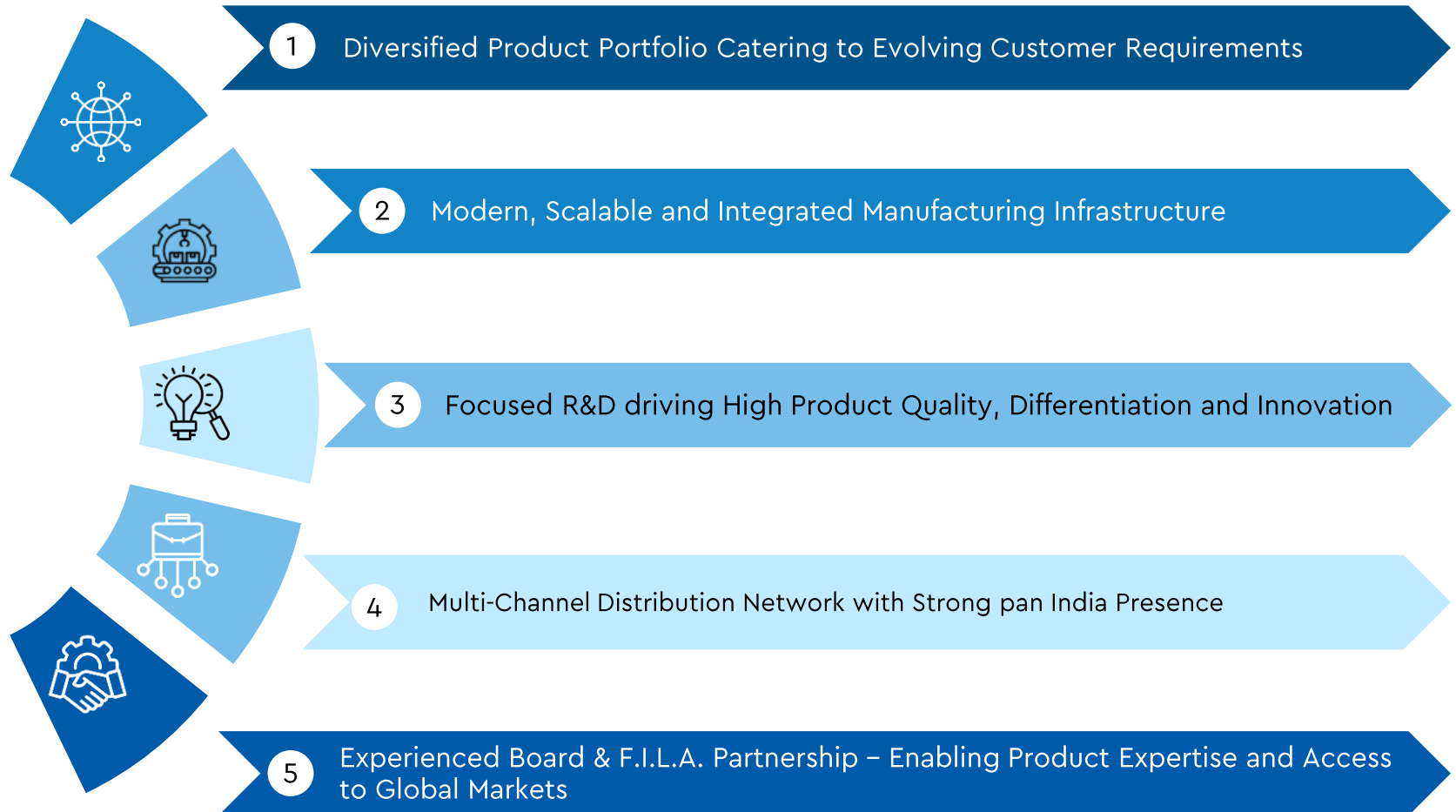
Company Overview



Major Corporate Events and Timeline



Note: (1) DOMS Industries Limited was originally incorporated as Writefine Products Private Limited; (2) R.R. Industries was engaged in the business of manufacturing and sale of pencils and crayons as a partnership firm and S. Tech Industries was engaged in the business of manufacturing and sale of polymer based pencils



01. Diversified Product Portfolio



Diversified Product Portfolio – One stop shop for all Stationery & Art Materials and Baby Hygiene Products

Scholastic Stationery



Scholastic Art Material



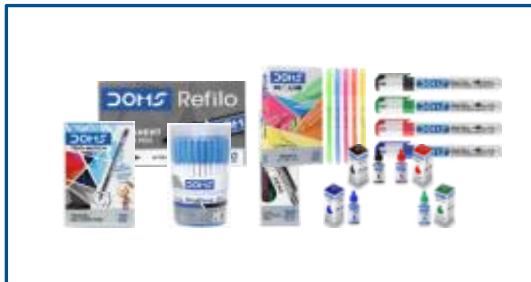
Paper Stationery



Kits & Combos



Office Supplies



Hobby & Craft



Fine Art Products



Hygiene Products



Products offered in multiple categories at diverse price points through our wide range of SKUs

02. Modern, Scalable and Integrated Manufacturing Infrastructure (1/2)

Scale and Size of Operations – 16 Manufacturing Facilities Spread Across 1.80 mn sq.ft. Facility Area



Operations spread across ~43+ acres in Umbergaon and 4 acres in Jammu, Jalandhar & Jaipur



Construction going on in full swing at the 44+ acres new facility

Robust Manufacturing Infrastructure – Enabling End-to-End Operations



02. Modern, Scalable and Integrated Manufacturing Infrastructure (2/2)

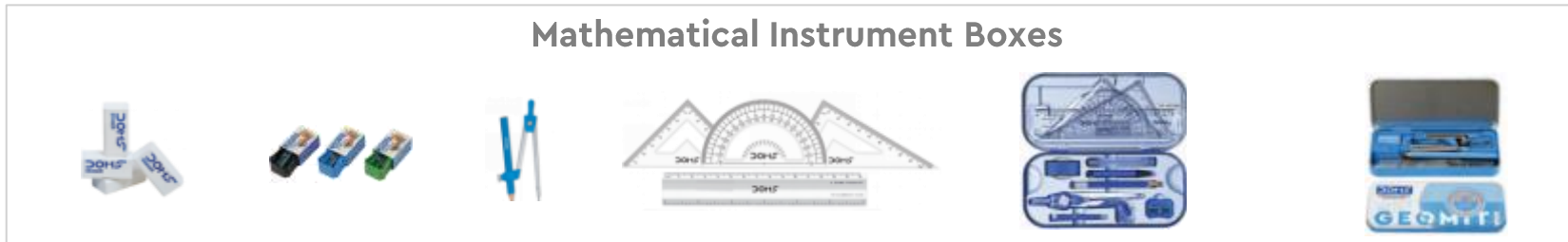
Backward Integrated In-House Manufacturing Infrastructure – Driving Operational Efficiency

Wooden Pencils



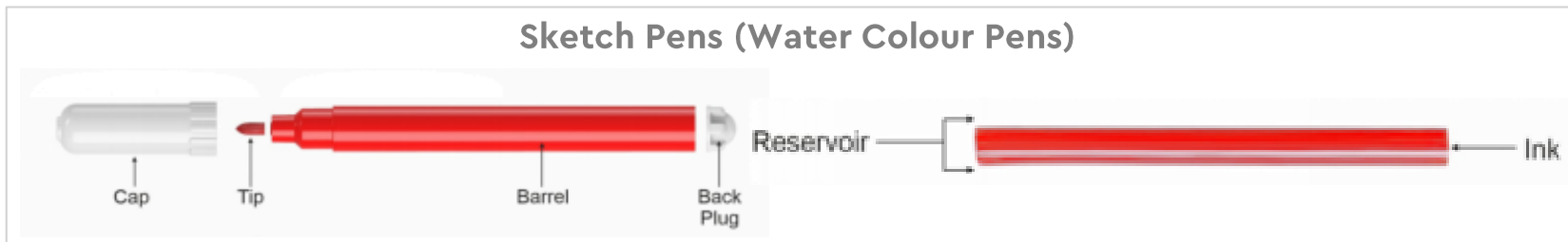
- All key components are manufactured in-house

Mathematical Instrument Boxes



- Tin boxes & Label Printing
- Mathematical Instruments
- Other Stationery Materials

Sketch Pens (Water Colour Pens)



- From sketch pen caps to ink & reservoir – All are manufactured in-house

03. Focused R&D driving High Product Quality, Differentiation and Innovation



State-of-Art R&D Facility and In-House Designing Team




R&D and Design Team
50+ employees¹




Quality Check & Assurance Team
115+ employees¹

F.I.L.A. Expertise as a Strategic Partner



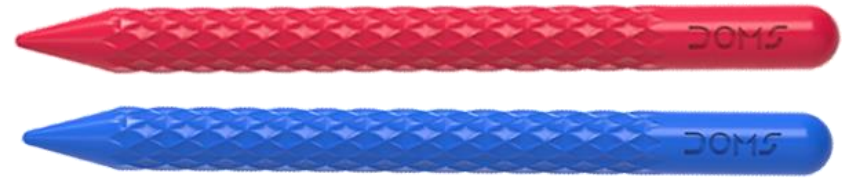
 Knowledge sharing arrangement with F.I.L.A.



 F.I.L.A. partnership augmenting DOMS R&D capabilities

 Exchanging technical know-how from F.I.L.A.

Key Innovation Initiatives



Improved Usability

Innovative Design

Patented Technology

Note: (1) As of September 30, 2024

04. Multi-Channel Distribution Network with Strong pan India Presence



125+
Super Stockists

4,750+
Distributors

135,000+
Retail Outlets

750+
Sales Personnel



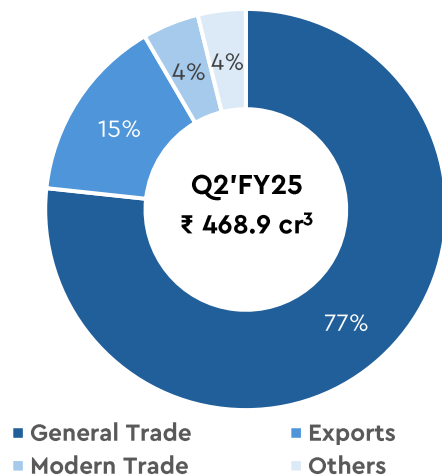
6
Continents

50+
Countries

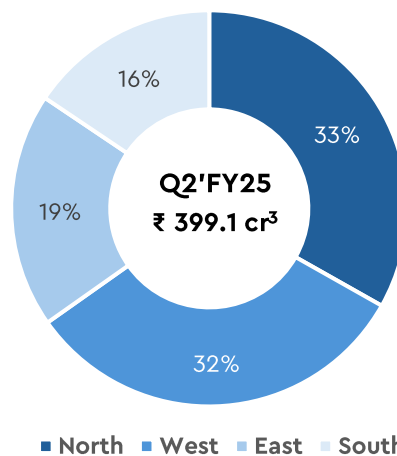
8.6%
F.I.L.A. Group Exports¹

6.3%
Third Party Exports¹

Multi Channel Presence



Balanced Regional Mix²



Key Distribution Strengths



Pan India presence and accessibility



Minimal receivables in general trade



Presence across leading modern trade chains



Available on multiple e-commerce platforms

Note: (1) As of September 30 2024 (2) North includes New Delhi, Haryana, Chandigarh, Punjab, Jammu and Kashmir, Uttar Pradesh, Uttarakhand, and Himachal Pradesh; West includes Maharashtra, Madhya Pradesh, Chhattisgarh, Gujarat, Dadra and Nagar Haveli and Daman and Diu, Goa, and Rajasthan; East includes West Bengal, Bihar, Jharkhand, Orissa, Assam, Tripura, Manipur, and Nagaland; South includes Tamil Nadu, Kerala, Karnataka, Telangana, Puducherry, and Andhra Pradesh: (3) Q2-FY25 Gross Product Sales; (4) Other Key data points as of September 30, 2024 unless otherwise mentioned

Board of Directors

Indian Promoter Family



Santosh Raveshia
Managing Director

Joined R.R. Industries in 2000



Sanjay Rajani
Whole Time Director

Joined R.R. Industries in 1985



Ketan Rajani
Whole Time Director

Joined R.R. Industries in 2003



Chandni Somaiya
Whole Time Director

Associated with S-Tech Industries as a partner since 2004

Foreign Promoter - F.I.L.A. Group



Massimo Candela
Non- Executive Director

Chief Executive Officer – F.I.L.A.; Associated with F.I.L.A. since 1992



Annalisa Barbera
Non- Executive Director

Non-Executive Director – F.I.L.A.; Ex. Trifirò and Partners



Luca Pelosin
Non- Executive Director

Executive Director – F.I.L.A.; Ex. Nuova Alpa Collanti S.r.l.



Cristian Nicoletti
Non- Executive Director

Chief Financial Officer – F.I.L.A.; Ex. Akzo Nobel Coatings S.p.A.

Independent Directors



Gianmatteo Terruzzi
Chairman & Independent Director

Ex. LVT Advisors S.R.L., Egida SRL, I.R.E. 2 S.R.L., Lusben Varazze S.R.L



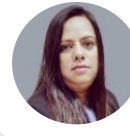
Rajiv Mistry
Independent Director

Founder and Chairman of Ascent Meditech Limited



Mehul Shah
Independent Director

Advocate with Bar Council of Maharashtra and Goa



Darshika Thacker
Independent Director

Partner, Thacker & Associates

Experienced Senior Management Team



Harshad Raveshia
Chief Consultant
Wood Working
Division



Suresh Rajani
Chief Consultant
Color Pencil Division



Vijay Somaiya
Head – Polymer
Division



Purav Raveshia
Vice President
Product
Development



Sumit Rajani
Vice President
Color Pencil &
Graphite Lead



Suraj Raveshia
Vice President
International
Business



Santosh Swain
Vice President
Purchase & General
Affairs



Rahul Shah
Chief Financial
Officer



Saumitra Prasad
Chief Marketing
Officer

DOMS Family – Inclusive, Balanced & Diverse

11,500+
Total Employees¹

1,000+
Contractual Employees¹

~6,000 (Over 50%)
Female Employees¹

About F.I.L.A. Group



Industry Experience
100 years

Market Presence
150 countries

No. of Brands
25

Production Sites
22

Revenues¹
EURO 779mn

Symbiotic Relationship with F.I.L.A. Group

Access to F.I.L.A. Capabilities



Product Manufacturing for F.I.L.A.



DOMS Manufacturing Experience



Access to F.I.L.A. Group's Popular and Premium Brands



Exclusive Marketing Rights in 7 countries

Note: (1) As of December 31, 2023



Focus on expanding Manufacturing Capacity

- Wooden Pencil manufacturing capacity expansion underway – expected to commence production by Q4'FY25
- Increase in capacity of paper stationery, fine art products, adhesives & polymer pencils planned towards end of the current financial year
- Regular modernization/upgradation at existing facility leading to improving manufacturing capacities
- Construction at ~44 acre land parcel ongoing in full swing



Capitalising Inorganic Growth Opportunities

- Acquisition of SKIDO Industries & Uniclan Healthcare, providing entry into Back to School segment (BTS) & Baby Hygiene industry, respectively
- Explore opportunities across products with focus around universe of kids – Expand Addressable Market Size
- Seek partnership opportunities in international markets to enhance geographical presence



Continue Expanding Product Lines

- Recent Expansion of product portfolio - Introduction of refillable pens, adhesives and fine art products
- Seek to expand product lines associated through growing years of kids, children and young adults with an aim to evolve more than just a stationery brand viz. School Bags (BTS segment)
- Additionally, continue to focus on increasing depth within products thereby improving ASP



Strengthen Distribution & Market Reach

- Omnichannel distribution network expansion strategy in place
- Deepen existing relationship by increasing shelf space for products (new SKUs & Products)
- Arrangements with more super stockists & distributors to reach under-served areas and smaller towns
- Parallely focus to develop modern trade & e-commerce platforms



Leverage Technology & Data Capabilities

- Continue to invest in technology to drive business efficiencies and cross-functional synergies
- Strengthen systems for better production planning & managing distribution operations
- Further strengthen data analytics enabling better understanding of preferences of customers, improve sales and help in scaling operations



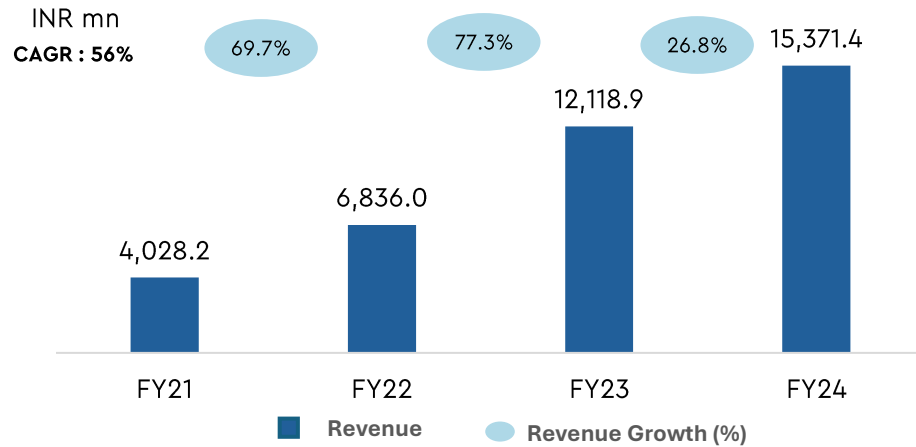
Impeccable Financial Performance



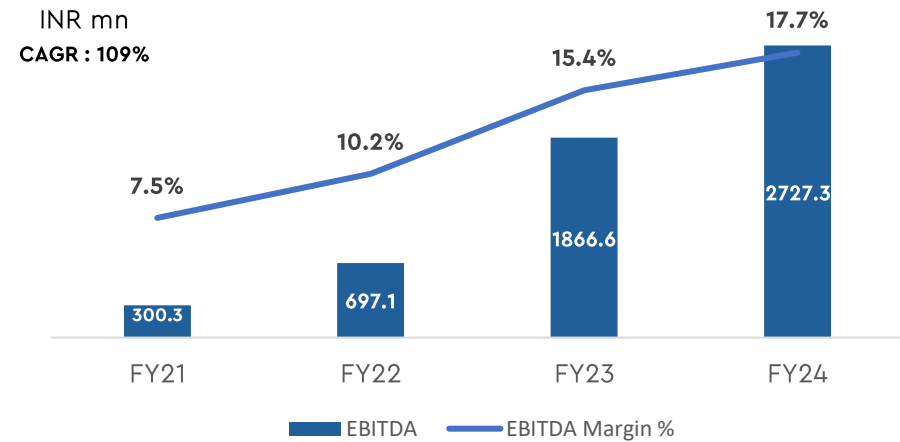
Strong Financial Profile



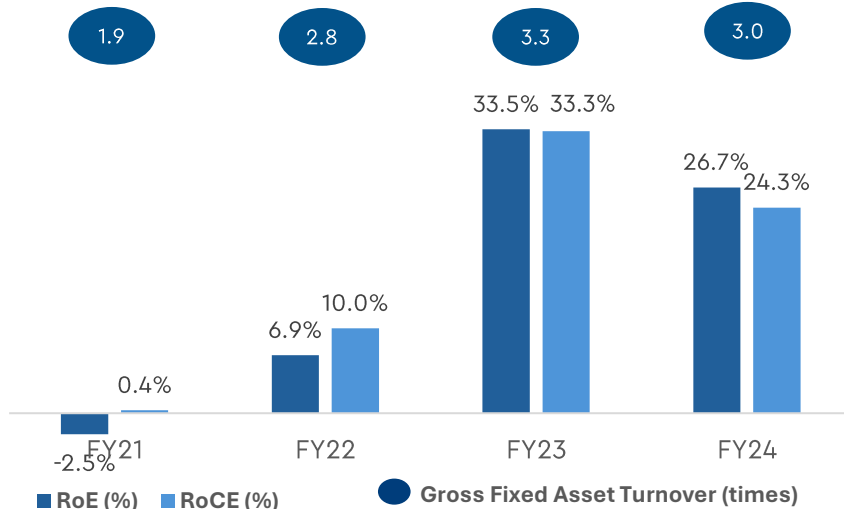
Revenue and Revenue Growth (%)



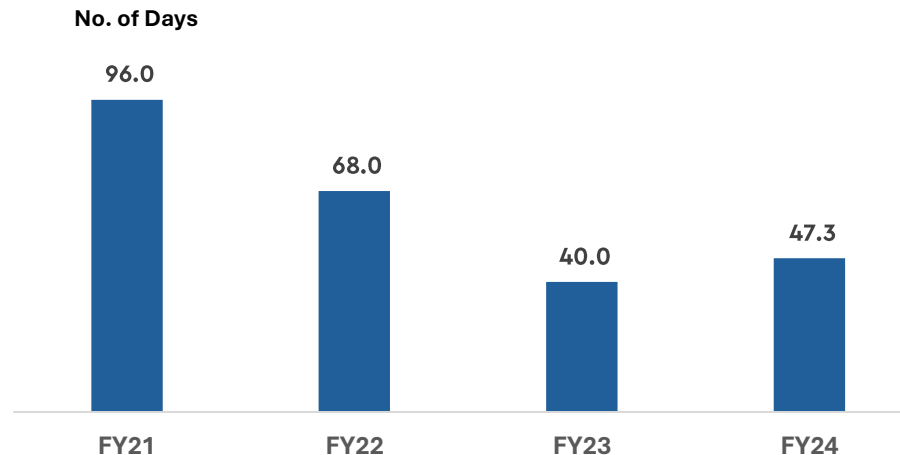
EBITDA and EBITDA Margin (%)



Return on Capital Employed (%) and Return on Equity (%)



Working Capital Cycle



Consolidated Profit and Loss Statement



Particulars (₹ mn)	FY21	FY22	FY23	FY24
Revenue from Operations	4,028	6,836	12,119	15,371
Other Income	60	26	46	101
Total Income	4,088	6,862	12,165	15,473
Cost of Materials Consumed	2,321	4,251	7,427	8,784
Purchase of Stock-in-Trade	116	138	261	591
Changes in Inventories of Finished Goods, Stock-in-Trade and WIP	16	(68)	(55)	(448)
Employee Benefits Expense	711	1,014	1,418	2,131
Finance Costs	88	103	119	171
Depreciation and Amortization	348	380	407	512
Other Expenses	564	804	1,201	1,586
Total Expenses	4,164	6,622	10,778	13,328
Profit / (Loss) Before Tax	(76)	240	1,388	2,145
Tax Expenses	(16)	69	359	548
Profit / (Loss) After Tax	(60)	171	1,029	1,597

Consolidated Balance Sheet

Particulars (₹ mn)	FY21	FY22	FY23	FY24
Non-Current Liabilities				
Borrowings	29	29	152	837
Lease Liabilities	283	294	303	430
Provisions	60	78	91	149
Total Non-Current Liabilities	372	400	545	1,416
Current Liabilities				
Borrowings	944	821	849	322
Lease Liabilities	81	87	95	130
Trade Payables	568	811	870	904
Other Financial Liabilities	131	131	175	411
Other Current Liabilities	63	144	310	294
Total Current Liabilities	1,787	1,993	2,299	2,061
Equity				
Equity Share Capital	4	4	4	607
Other Equity	2,332	2,469	3,371	7,537
Non-Controlling Interest	81	108	179	278
Total Equity	2,417	2,581	3,553	8,422
Total Equity and Liabilities	4,575	4,975	6,398	11,900

Particulars (INR mn)	FY21	FY22	FY23	FY24
Non- Current Assets				
Property, Plant and Equipment	1,869	1,861	2,799	3,814
Capital Work-in-Progress	31	40	69	254
Right of use Assets	379	382	382	543
Goodwill	33	20	20	624
Other Intangible Assets	5	2	1	1
Financial Assets	114	106	124	144
Other Non-Current Assets	71	117	209	355
Total Non-Current Assets	2,502	2,528	3,604	5,735
Current Assets				
Inventories	1,208	1,592	1,846	2,251
Trade Receivables	419	492	356	646
Cash and Cash Equivalents	227	93	343	565
Bank Balance other than above	63	65	75	2,495
Other Current Assets	156	205	174	209
Total Current Assets	2,074	2,446	2,794	6,165
Total Assets	4,575	4,975	6,398	11,900

Consolidated Cash Flow Statement

Particulars (₹ mn)	FY21	FY22	FY23	FY24
Cash flow from Operating Activities				
Profit / (Loss) before tax	(76)	240	1,388	2,145
Adjustments for non-cash items	350	416	431	509
Adjustment for non-operating items	49	92	106	105
Operating cash inflow before working capital changes	323	748	1,924	2,758
Net decrease / (increase) in working capital	(149)	(207)	154	(289)
Cash generated from Operations	174	541	2,077	2,469
Income tax paid (net of refunds)	22	32	345	(643)
Net cash flows generated from Operating activities (A)	152	509	1,733	1,826
Cash flow from Investing Activities				
Purchase of property, plant and equipment (including CWIP and capital advances)(net)	(230)	(349)	(1,363)	(1,535)
Acquisition of subsidiary, net of cash	-	-	-	(705)
Proceeds from sale of property plant & equipment	66	2	8	3
Other Inflow / (Outflow) from Investing Activities	(23)	10	(5)	(2340)
Net cash flows used in Investing activities (B)	(187)	(337)	(1,359)	(4,576)
Cash flow from Financing Activities				
Proceeds from Fresh Issue of Shares (Net)	-	-	-	3,347
Dividends paid	-	-	(56)	(93)
Finance cost paid	(84)	(110)	(140)	(158)
Payment of lease liabilities	(51)	(79)	(74)	(111)
Proceeds / (Repayments) of borrowings	384	(117)	145	(13)
Net cash flows (used in) / generated from Financing activities (C)	249	(306)	(124)	2,972
Net increase/(decrease) in cash and cash equivalents (A+B+C)	214	(134)	250	222

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DOMS Industries Limited

17th Floor, C – Wing, Kailas Business Park, Hiranadani Link
Rd, Vikhroli West, Mumbai, Maharashtra 400079
E.: ir@domsindia.com



Investor Relations Advisor

Marathon Capital Advisory Private Limited

Bhavin Ranawat (9819345619 / bhavin@marathoncapital.in)
Amit Porwal (9819773905 / amit@marathoncapital.in)