

6th August, 2024.

To,

BSE Limited, Phiroze Jeejeebhoy Tower, Dalal Street, Mumbai – 400 001.	National Stock Exchange of India Ltd. Exchange Plaza, 5th Floor, Plot No. C/1, G Block, Bandra Kurla Complex, Bandra (East), Mumbai – 400 051
Scrip Code: 503811	Company Symbol: SIYSIL

Dear Sir/ Madam,

Sub: Investor Presentation

Pursuant to Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, we enclose herewith Investor Presentation on the Unaudited Financial Results of the Company for the quarter ended 30th June, 2024.

The Investor Presentation is also available on the website of the Company i.e. www.siyaram.com.

We request you to take the above information on record.

Thanking you,

Yours faithfully,

For SIYARAM SILK MILLS LIMITED

William Fernandes
Company Secretary

Encl : a/a.



Siyaram's

Investor Presentation | Q1 FY25

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Q1 FY25 Performance



Mr. Gaurav Poddar,
Executive Director

In Q1 FY25, subdued consumer demand was further affected by severe heat waves that shifted spending priorities and significant disruptions to sales channels due to election-related events. These factors combined to create a challenging environment for consumer driven sectors.

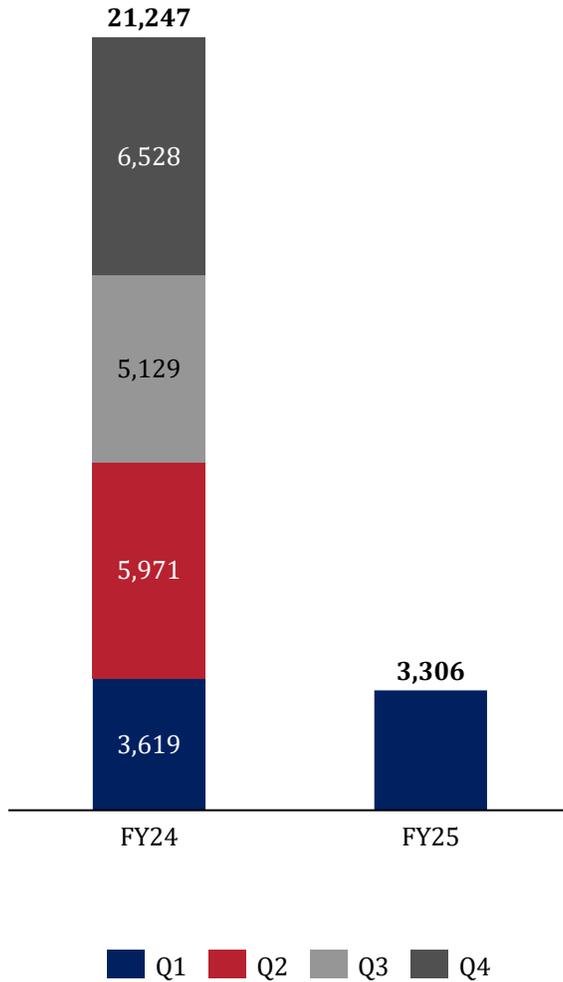
In terms of financial performance, our Total income for Q1FY25 stood at ₹ 3,306 mn, as compared to ₹ 362 crores in Q1FY24. Our revenue mix comprised Fabric at 77%, Garments at 13%, and Yarn & Others at 10% in Q1FY25. We are pleased to report an EBITDA of ₹ 34 crores with an EBITDA Margin of 10.3% for the quarter. Furthermore, our Profit After Tax (PAT) for the quarter stood at ₹ 12 crores, with a PAT Margin of 3.6%.

Further to boost our sales, we are setting up ~30 fast fashion and ethnic retail outlets separately in Tier I, II, and III cities. We will invest ~₹50 crores by 31st March 2025 to establish these stores, which will operate on a company-owned, company-operated model. These stores will be funded through internal accruals.

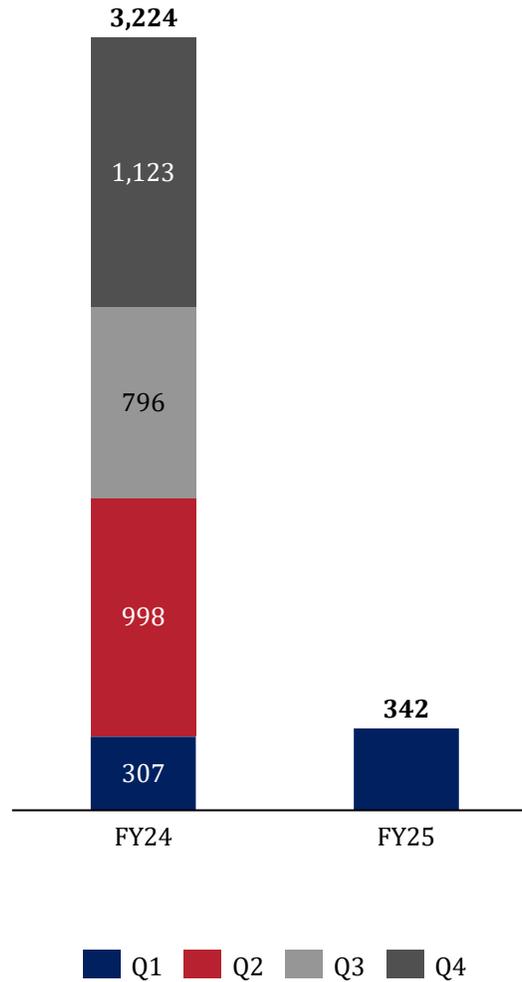
We anticipate that consumer demand will begin to increase from Q3, driven by the upcoming festivities. This rise in demand is expected to lead to improved financial performance. As a result, we foresee a boost in our overall financial stability and growth, positioning us more favourably for future success.

Quarterly Business Performance

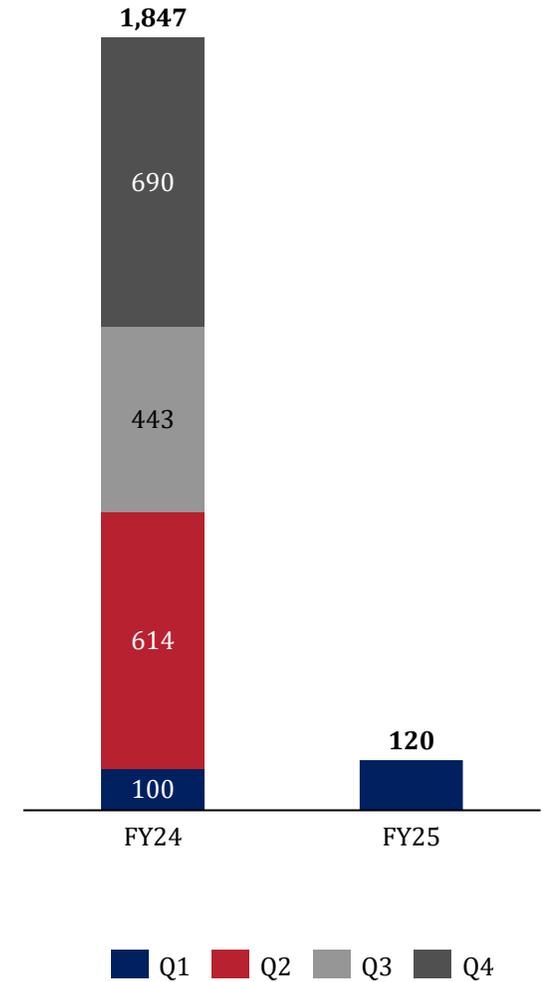
Total Income



EBITDA



Net Profit After Tax



Note: Rounded off to the nearest whole number

Q1 FY25 Profit & Loss Statement

Particulars (₹ in Mn)	Q1 FY25	Q1 FY24	Y-o-Y
Revenue from Operations	3,065	3,537	
Other Income	241	82	
Total Income	3,306	3,619	-8.7%
Cost Of Goods Sold	1,639	1,986	
Employee Expenses	402	400	
Other Expenses	923	926	
EBITDA	342	307	11.2%
EBITDA Margin (%)	10.3%	8.5%	
Depreciation	138	134	
EBIT	204	172	18.0%
EBIT Margin (%)	6.2%	4.8%	
Finance Cost	46	41	
Profit before Tax	158	132	20.2%
Profit before Tax(%)	4.8%	3.6%	
Tax	38	32	
Profit After Tax	120	100	20.0%
PAT Margin (%)	3.6%	2.8%	
EPS (As per Profit after Tax)	2.6	2.1	

Siyaram's

Our Legacy, Our Future



From 1978 till today, through our fabrics and brands, we have carved a niche in the hearts and minds of millions.

Amongst India's most renowned brands and marketers of fabrics, readymade garments, and other textiles products.

Strong brands & sub-brands like Siyaram, Mistair, J. Hampstead, CADINI, Oxemberg and many more

Operates franchises, retail stores and online platform presence, which offer menswear fashion fabrics, apparel, and accessories

An ISO 14001:2008, 45,001: certified company, with integrated state-of-the-art manufacturing plants across Tarapur, Daman, Amravati and Silvassa

A distribution ecosystem with brands focusing on all the segments of the market

Today, when we say, "**Come home to...**", the world says... **Siyaram's**



Manufacturing

1978-1987

- Established in 1978
- Went Public in 1980
- Setup capacity for manufacturing & weaving and processing at Tarapur



Business Expansion

1991-2009

- Started brand promotion exercise for brand Siyaram with the tagline **“Coming Home to Siyaram’s”**
- Introduced Oxemberg to venture into readymade garments
- Launched J. Hampstead to market with 100% pure worsted suiting fabrics
- Started & expanded the weaving capacity at Silvassa
- Launched Mistair, a fashion brand



Brand Creation

2013-2020

- Siyaram's voted as the most trusted brand by Economic Times and Nielsen Media Research
- Acquired the Italian Brand Cadini
- Set up indigo rope dyeing unit at Amravati
- Launched Siyaram's Mozzo - A casual Apparel Brand
- Set Guinness World Record for online Textile Mahakumbh



Innovation & Asset Light Model

2021-2024

- Launched DEN - KNIT Knitted Denim fabric brand
- Launched Siyaram's Exclusive Knit Wear Brand - Tessio
- Launched range of Bamboo blended shirting fabric brand under sub brands EVITA & BREEZY
- Launched Ethnic wear fabric brand Ethnair



We serve multiple end markets..



800+

Distributors spread across pin codes

~100 Mn Meters

Fabric Sold in FY24

245+

Stores Across Nation

~1.85L sqft

Retail Space

~4.5 Mn pieces

Apparels Sold in FY24

Distributors | MBO's | Institutions

5 Mn and counting...

Customers Served

Online Marketplace | Exclusive Shops



FABRICS

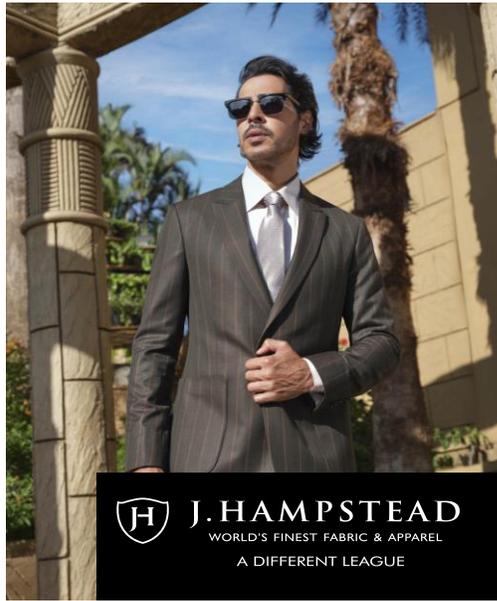
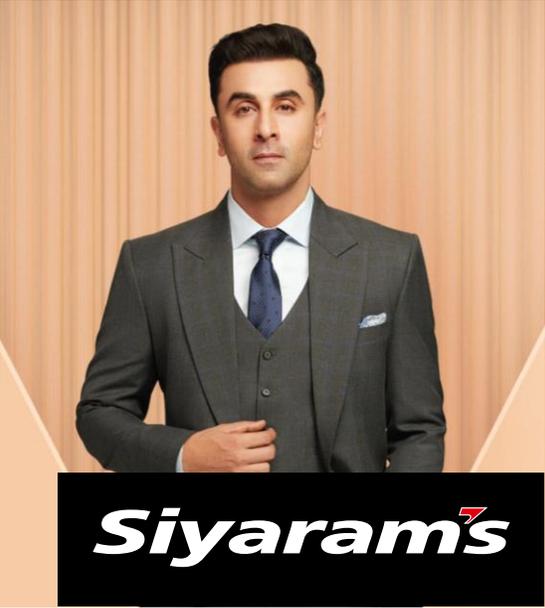


GARMENTS



...through serving Different Customer Needs

Siyaram's



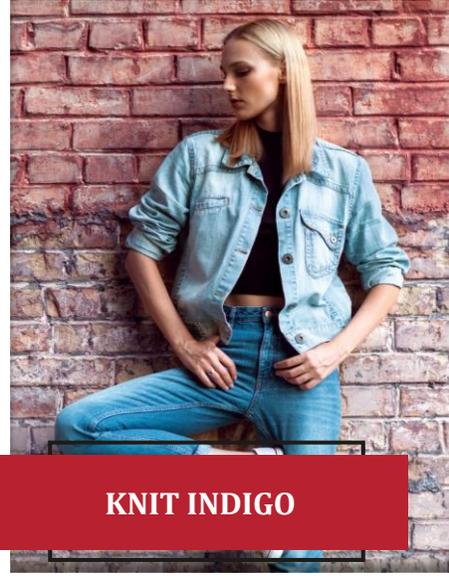
...through our Innovative Offerings



**BLENDED BAMBOO
FABRIC**



**TERRY RAYON SUITING
FABRIC**



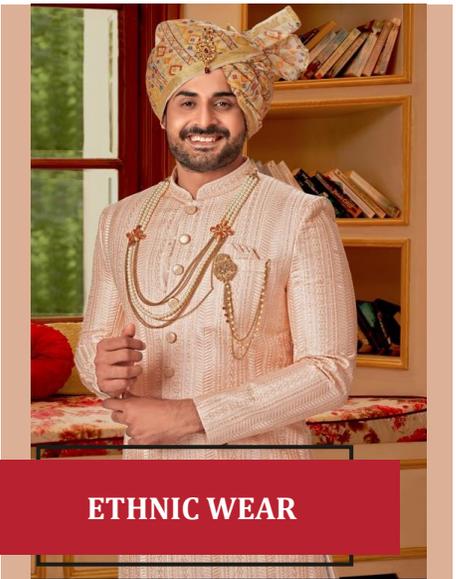
KNIT INDIGO



JET BLACK COLLECTION



KNIT WEAR



ETHNIC WEAR

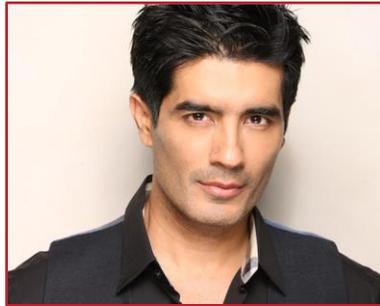
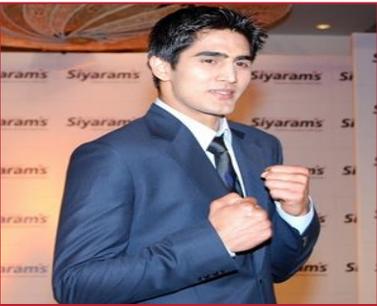


STRETCH COLLECTION

The urge to innovate, the quest for artisanal fabrics, and the transmission of exceptional know-how have enabled the creation of world-class bamboo cotton fabric clothing in India to stand the test of time and forge the uniqueness of Siyaram's

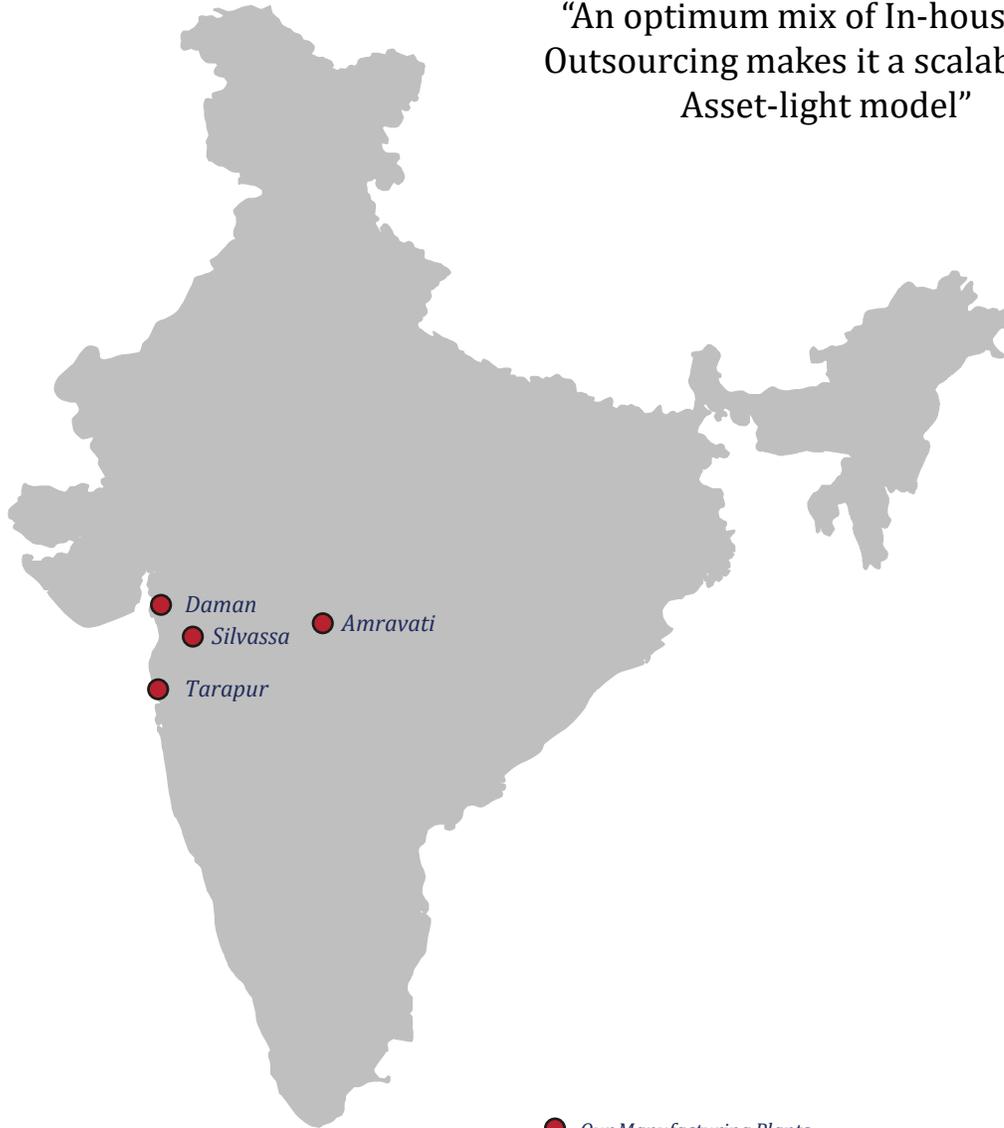
...through Brand Ambassadors

Siyaram's



...endorsing our Brands over the years

“An optimum mix of In-house and Outsourcing makes it a scalable and Asset-light model”



● Our Manufacturing Plants



Warping section hosts Bromas (Robotic), Karl Mayer and Benninger (Switzerland)



Weaving technology like Rapier: Picanol (Belgium) and Dornier (Germany), Projectile: Sulzer Textile (Switzerland), Airjet: Toyoda (Japan)



As we offer stylish and comfortable products, we also prioritize the safety of our customers. We ensure safety and unparalleled quality by using eco-friendly chemicals in all our fabrics and subjecting them to rigorous quality checks at every stage

In-house Design Studio

Every dream is distinct, and we ensure that our teams, the creative vision, materials, and craftsmen all work together to create a unique translation. We uphold the highest standards for materials, perfect lines, and meticulous attention to detail

Our in-house Design Studio comprises textile designers who have honed their skills through years of practice and work tirelessly to create designs that are both beautiful and comfortable

Moreover, our R&D department combines innovative textiles with the contemporary needs of today's man

WOOL BLENDS

100% COTTON

BLENDED BAMBOO
FABRIC

TERRY RAYON

COTTON BLENDS

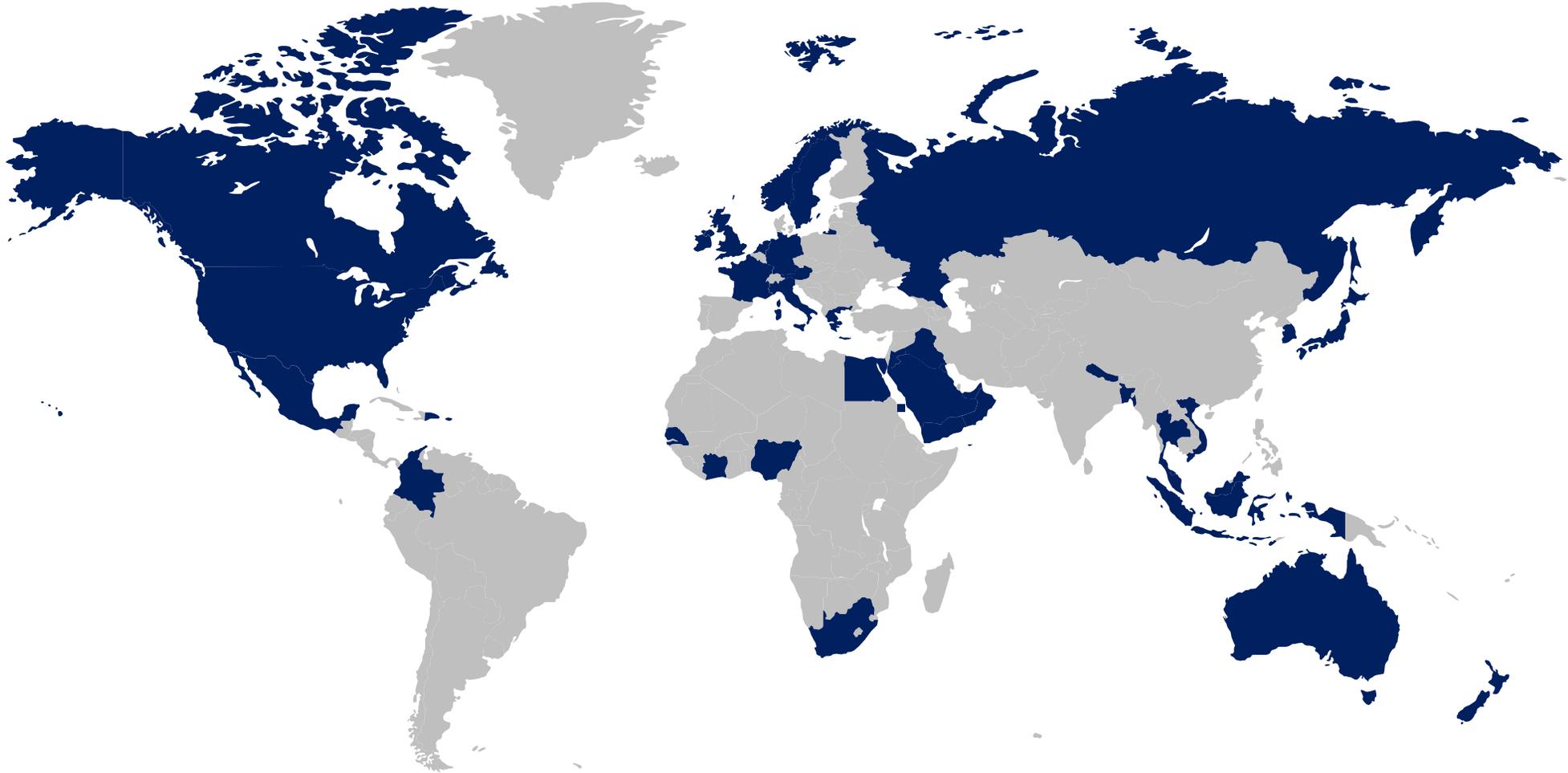
100% LINEN & LINEN
BLENDS

Export Regions

- ✓ Australia
- ✓ Bahrain
- ✓ Bangladesh
- ✓ Canada
- ✓ Colombia
- ✓ Dubai
- ✓ Egypt
- ✓ Germany
- ✓ Hong Kong
- ✓ Indonesia
- ✓ Japan
- ✓ Jordan
- ✓ Kuwait
- ✓ Malaysia
- ✓ Mexico
- ✓ Nepal
- ✓ New Zealand
- ✓ Oman
- ✓ Qatar
- ✓ Saudi Arabia
- ✓ South Korea
- ✓ Thailand
- ✓ UAE
- ✓ UK
- ✓ USA
- ✓ Vietnam
- ✓ West Indies
- ✓ Yemen

Cadini Sales Regions

- ✓ Austria
- ✓ Belgium
- ✓ Canada
- ✓ Cote d'Ivoire
- ✓ Egypt
- ✓ France
- ✓ Great Britain
- ✓ Greece
- ✓ Iraq
- ✓ Ireland
- ✓ Italy
- ✓ Nigeria
- ✓ Norway
- ✓ Puerto Rico
- ✓ Russia
- ✓ Senegal
- ✓ Hong Kong
- ✓ South Africa
- ✓ Sweden
- ✓ USA



Our Organization



VISION

To be the preferred partner to every stakeholder in the textile and fashion industry by delivering high quality fabrics, implementing design-driven innovation, building trust, creating unsurpassed value and delighting customers time and again

MISSION

To provide quality products and to be a name, synonymous with high fashion in India and across the globe

VALUES



Core Values

Passion

Integrity

Team Spirit

Humility

Excellence



Ramesh Poddar

Chairman & Managing Director

Mr Ramesh Poddar is a stalwart of textile industry having rich experience of over 4 decades.

He has been instrumental in creating brand Siyaram's. His futuristic vision made Siyaram's a brand that exudes dynamism, quality and innovation. He led the company to build comprehensive product portfolio of suitings, shirtings and garments.

Mr Poddar is a member of various charitable trusts, offering services in many sectors. He was also a member of Textile committee to the Government of India and has represented the industry through key trade forums & associations. People in industry regard him as mentor because of his vast experience & knowledge and seek his help in solving complex business challenges.

Under his leadership, today Siyaram's has become one of the most trustworthy and household names in India.



Pawan Poddar

Joint Managing Director

Mr Pawan Poddar's vision from the beginning was to make Siyaram's a truly state-of-the art manufacturing organisation. His efforts stood the test of time and today Siyaram's manufacturing plants are considered the best in the industry.

Mr Poddar is also a well-known social figure who participates in various causes and activities supported by trade associations and industrial bodies such as FAITMA, BTRA and TIMA to make a difference in the industry.



Shrikishan Poddar

Executive Director

Mr Shrikishan Poddar established the Exports Division in Siyaram's to tap into global markets. With his intuition and relentless innovation, Siyaram's expanded to the USA, Europe, Australia, Far East, Gulf and Sri Lanka.

He launched Siyaram's home furnishings, offering fashionable curtains and upholstery fabrics.

With his unending quest he made Siyaram's a prominent force in International markets



Gaurav Poddar

Executive Director

Mr Gaurav Poddar is a new age leader whose dynamic and high energy persona always guides teams to excel in business.

He is involved in strategic planning for the group and new business initiatives especially in garments and retail businesses.

He has also contributed significantly across functions such as manufacturing, product development and technology upgradation.

Mr Poddar inherited his family's business acumen and combined it with a modern outlook making him a role model for young and budding entrepreneurs



**SHRI. SACHINDRA N.
CHATURVEDI**

He is a Fellow member of the ICAI, a bachelors' degree with honors in Technology and holds a master's degree in business administration. He has over 32 years of experience as a Practicing Chartered Accountant, and he is a member of Bombay Chartered Accountants' society and Tax Consultants Association. He has expertise in the areas of Audit, Taxation, Project / Corporate Finance, Investment Banking, M&As, Corporate Laws, DD exercises, Valuation, Restructuring & Rehabilitation and Strategic Business Planning. He has varied experience of auditing BFSI, PSU and many large companies. He also has valuable experience in monitoring / inspection / investigating / companies at the behest of banks / FIs / IT authorities / High Courts/ NCLT/ as well as inspection of books and records of MFs/ SE brokers/ plantation companies on behalf of SEBI.



**SHRI. CHETAN S.
THAKKAR**

He is a Graduate and has done his LLB from Shivaji University Kolhapur and LLM from Bombay University. He thereafter qualified as a Solicitor from Bombay and has since been associated with Kanga & Co., as an Associate and then as a partner from 2006 onwards. He is in practice for over 19 years and has vast experience in matters relating to capital markets including IPO, Rights Issues, QIPs, FCCB offerings foreign collaborations, Mergers & Acquisitions, private equity investments, corporate laws, banking, loan syndication, ECBS FDI, franchising, insurance matters and intellectual property matters.



**SHRI. DEEPAK R.
SHAH**

He is a Graduate and a Fellow member of the ICAI with 30 years of experience in the field of Direct and Indirect Tax. He was the Chairman of All India Federation of Tax Practitioners Western Zone for 2018 and 2019 and also the Chairman of Indirect Taxation Committee of Bombay Chartered Accountants' Society. He has served as President of Bombay Chartered Accountants' Society in the year 2012-13. He also served as an Editor of BCA Referencer for 12 years till 2012. He has expertise in the field of Audit, Company Law and Taxation (Direct and Indirect)



**SMT. MANGALA R.
PRABHU**

She is a Postgraduate in Commerce, a Law Graduate as well as CAIIB. She has 41 years of experience in the Banking Sector with cross multiple roles spanning across corporate credit, foreign exchange, HR and branch banking. Presently working as a Financial Consultant imparting Corporate Financial Advisory Services in Mid/ Large Corporate Clients.



**DR. ASHOK N.
DESAI**

He holds a Ph. D (Tech) in Textile Technology and is a Fellow of Institute of Engineers, India. He joined Bombay Textile Research Association (BTRA) in 1980. In July 2000 he took over as Director of BTRA and he initiated many activities towards self-sufficiency and finance discipline as well as gave a new direction to BTRA. He is a Scientist member of the Governing Council of SITRA. He is also the Chairman of TX30 and TX33 of the Bureau of Indian Standards and is Chairman of Textile Division Council of Bureau of Indian Standards. He has gained expertise in the fields of Spinning Technology, Microbiology, E-beam Radiation of Textiles, Plasma Processing applications to Textiles and other related fields.

Testimony to our Success



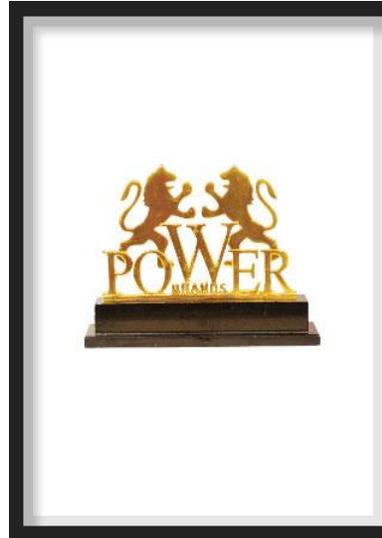
Guinness World Records for creating World's most viewed live stream



Ranked amongst Top 100 Franchise Opportunities



Awarded as India's Most Attractive Brands by Trust Research Advisory



Awarded as Most Trusted Brand by ET & Nielsen Media Research



Awarded as The Next 500 by Fortune India



Felicitated as Iconic Brands of India by ET

Our Advertising & Marketing Initiatives

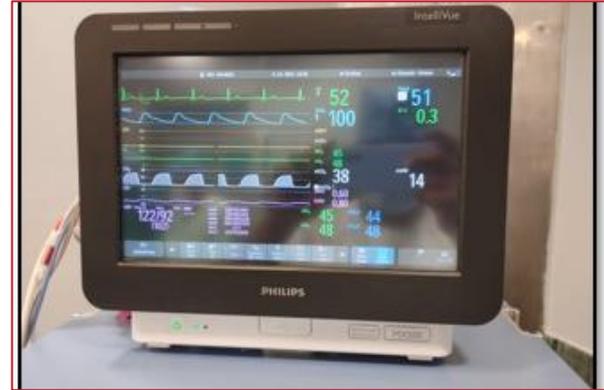




Blind Cricket Tournament 2024, Mumbai



Conducted Tailoring Workshops across 8 states



Disease Prevention Equipments at Tata Memorial, Mumbai



World Environment Day, Tarapur



Yoga Day Campaign, Mumbai



Green Energy Initiatives, Tarapur & Silvassa

Our Strategic Priorities

01 | Strengthen Distribution Network

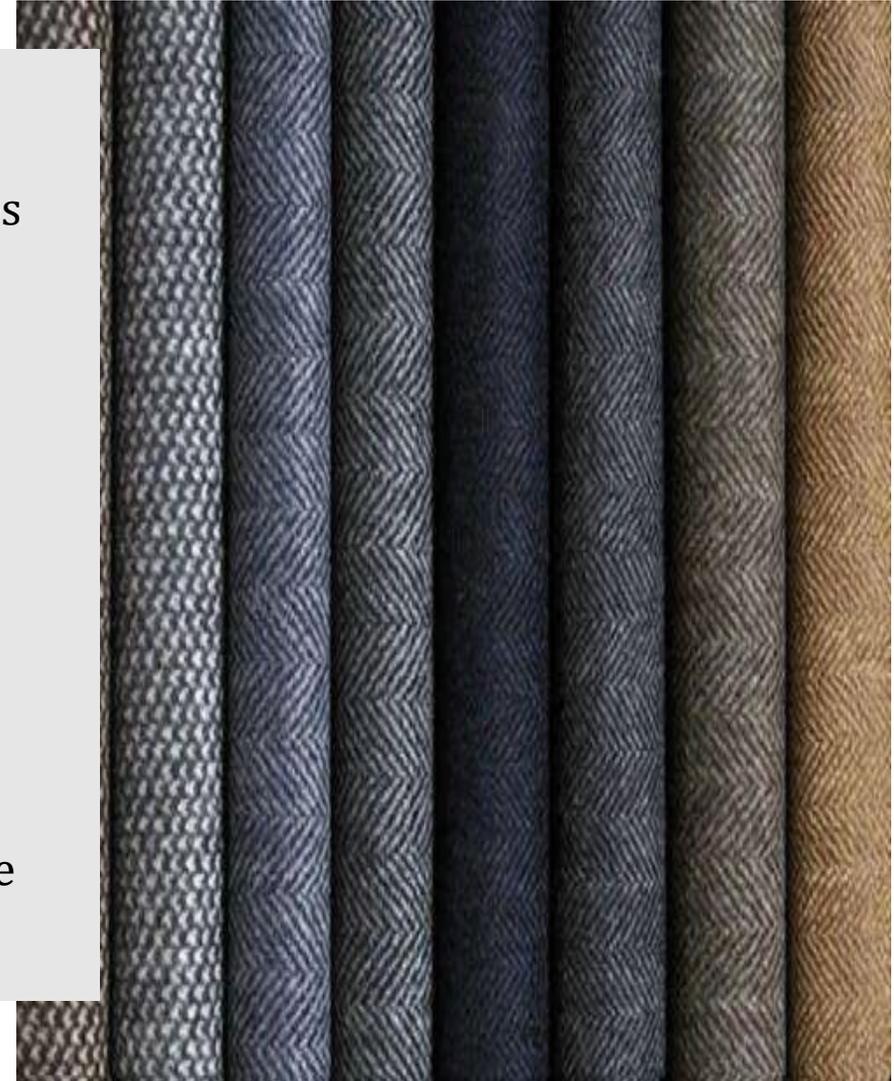
02 | Manufacturing through Outsourcing Partners

03 | Leverage Brand Siyaram's

04 | Expand Retail Network through Exclusive Stores

05 | Focus on Innovation & Quality Experience

06 | Promote Tailoring in the Community



Franchise Model : Win-win Proposition

Partnering with Siyaram's shop will provide a lucrative & sustainable business model and unmatched growth opportunities

FRANCHISE

BRAND'S LEGACY



Of over 4 decades

WARDROBE SOLUTION



Fashioning Modern Man

MULTIPLE BRANDS



Under One Roof

WIDE TARGET AUDIENCE



Right from 18 years to 60+ men

TAILOR FIT



Customized Services

LOYALTY PROGRAM



Base of 2.17 lac members

PAYBACK PERIOD



~3 years

READY CUSTOMER BASE



Higher Footfall

COMPANY

HIGHER MARKET SHARE

INCREASED REACH

HIGHER ROCE

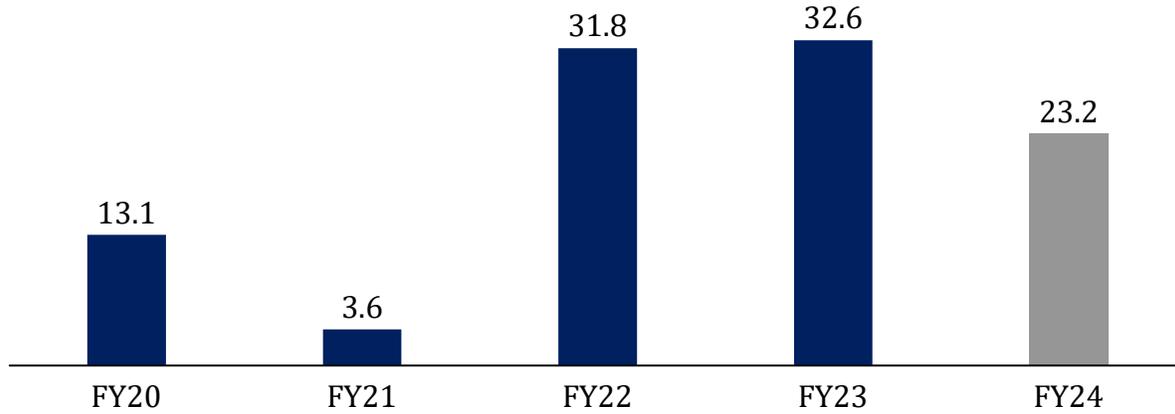
LOWER DEBT

FASTER GROWTH

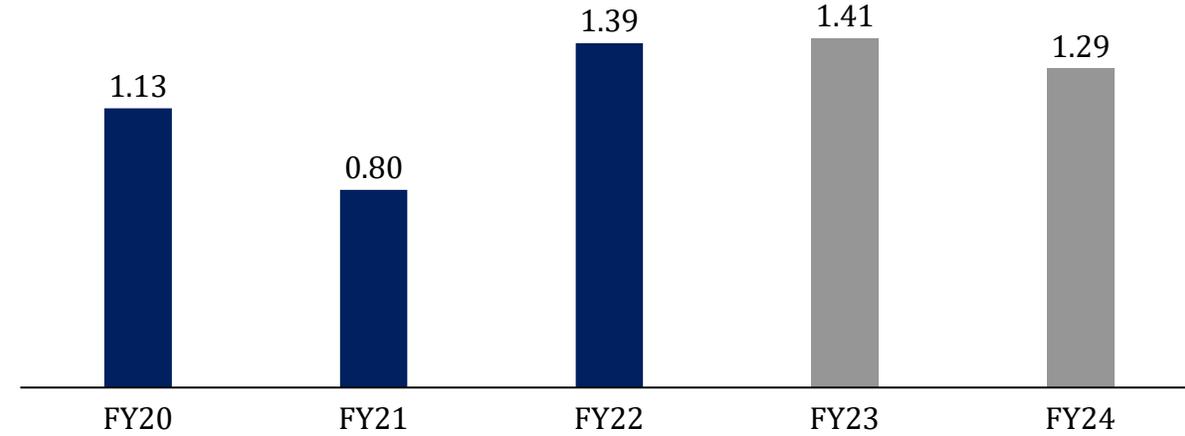
Outcome of Strategic Actions

Return on Capital Employed %

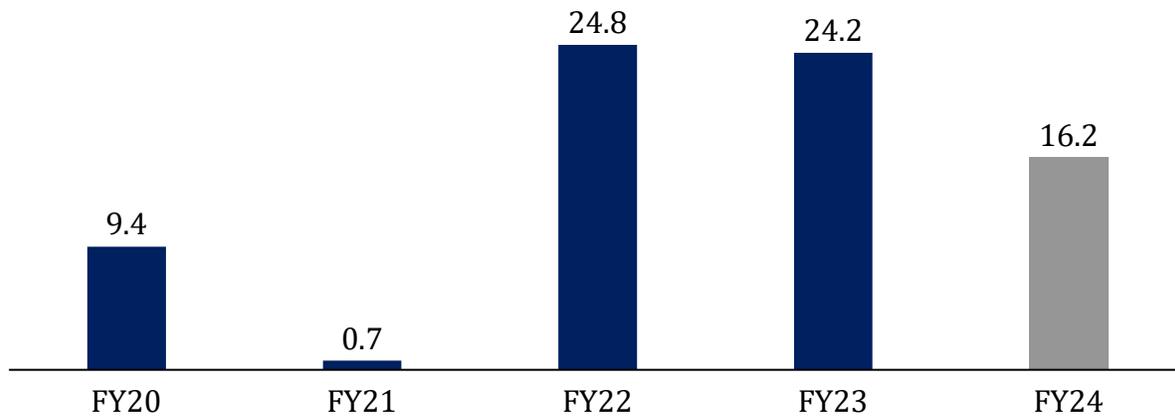
* Adjusted for cash & Investments



Asset Turnover ratio (x)

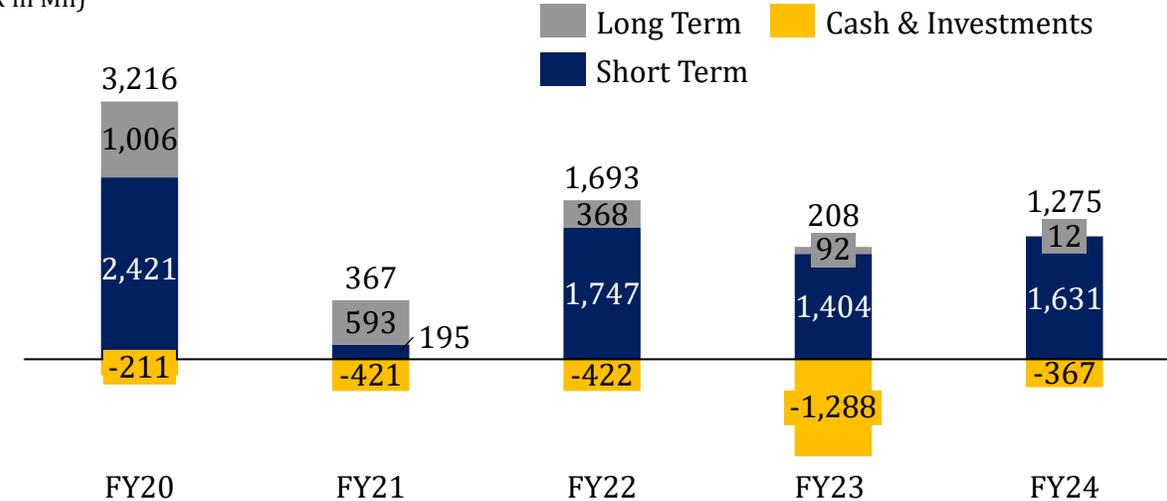


Return on Equity %



Net Debt Calculation

(₹ in Mn)



*FY21 was impacted by Covid related disruptions

Enhance the consumer experience

We survey customers regularly to adjust our products based on behavior and innovate with new designs, striving to be at the top of customer preferences in a competitive fashion industry

Rationalising the Product Mix

We have reduced SKUs and focused on fast-moving products and preferred designs to avoid inventory blockage, leading to enhanced profitability and receivables



New Marketing Approach

Our traditional marketing strategy garnered positive results in the domestic market, developing a vast network and penetrating tier-I, tier-II and tier-III cities. Now, it aims to attract online shoppers by targeting the digital space.



Redefining the sales strategy

We shifted from consignment sales to net sales to de-risk sales and collection cycle, eliminating provisions for returns and replacements and avoiding blocked working capital. This strategy also saves management bandwidth and provides a clear picture of demand



Accelerating Digital Adoption

We embrace digitalization in our day-to-day operations to improve efficiency, offering frequent training programs to help employees adapt to digital transformation initiatives

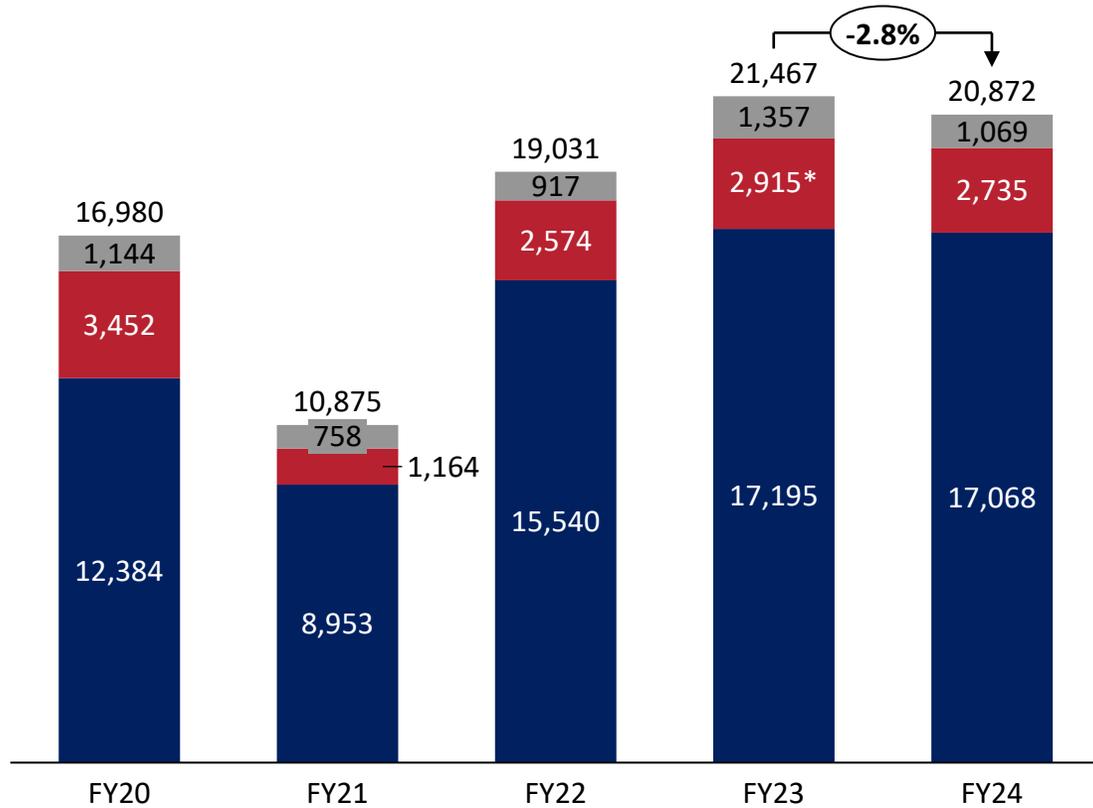
Our Financial Performance

Revenue Break-up

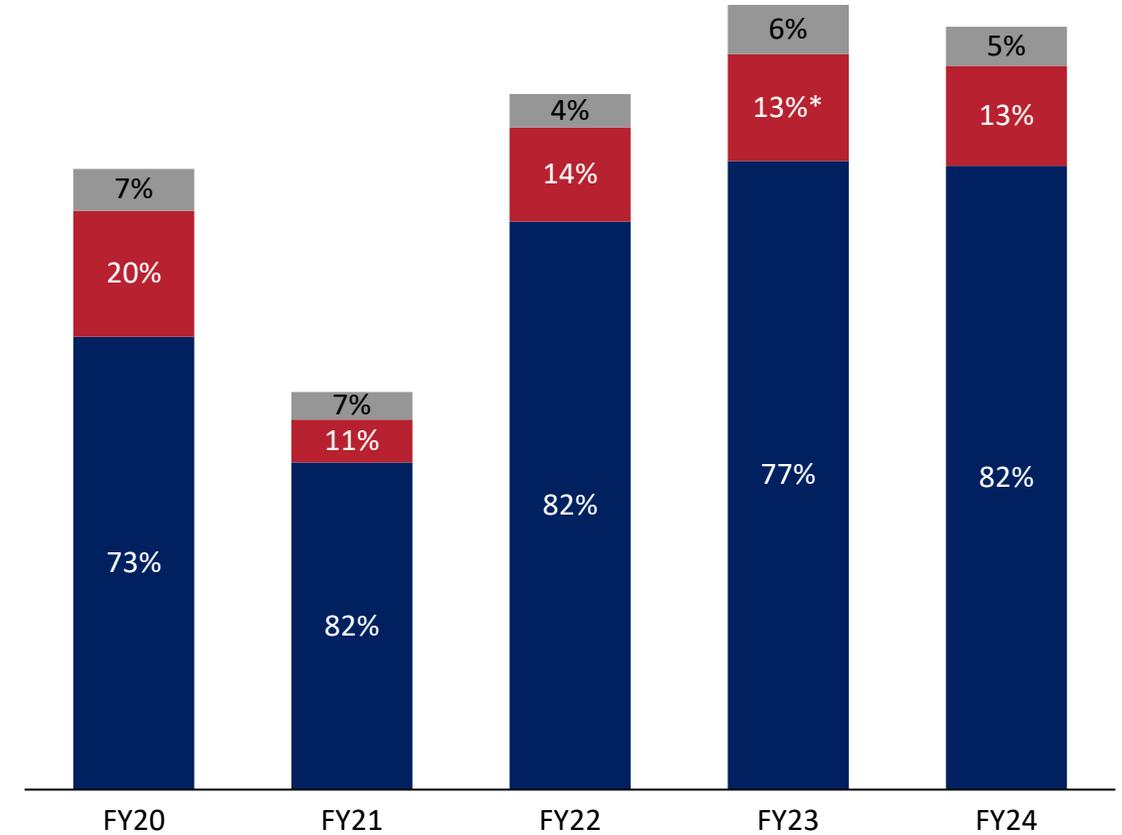
(in ₹ Million)

(in %)

* excl INR 826 mn of one time export order



* excl INR 826 mn of one time export order

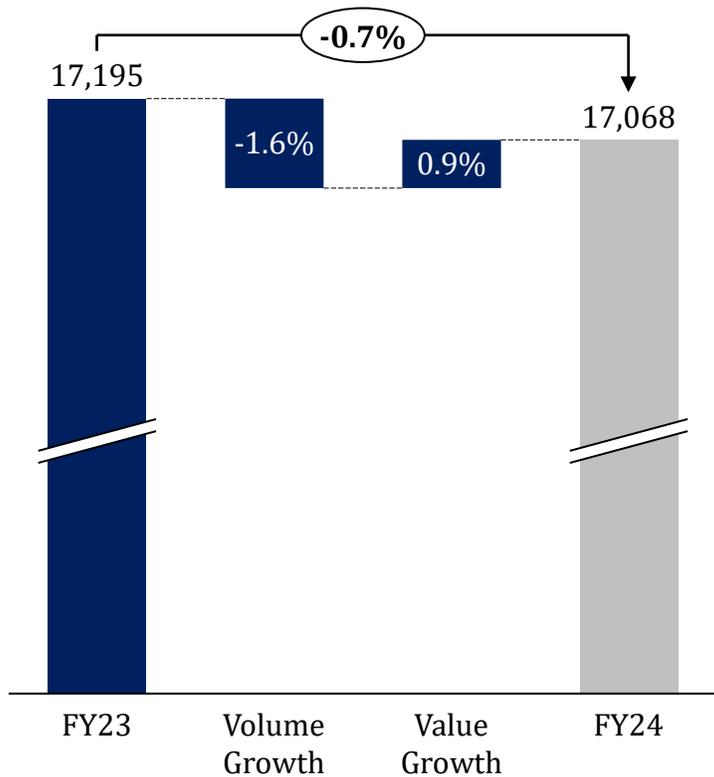


Yarn/knitting & Others Garment Fabric

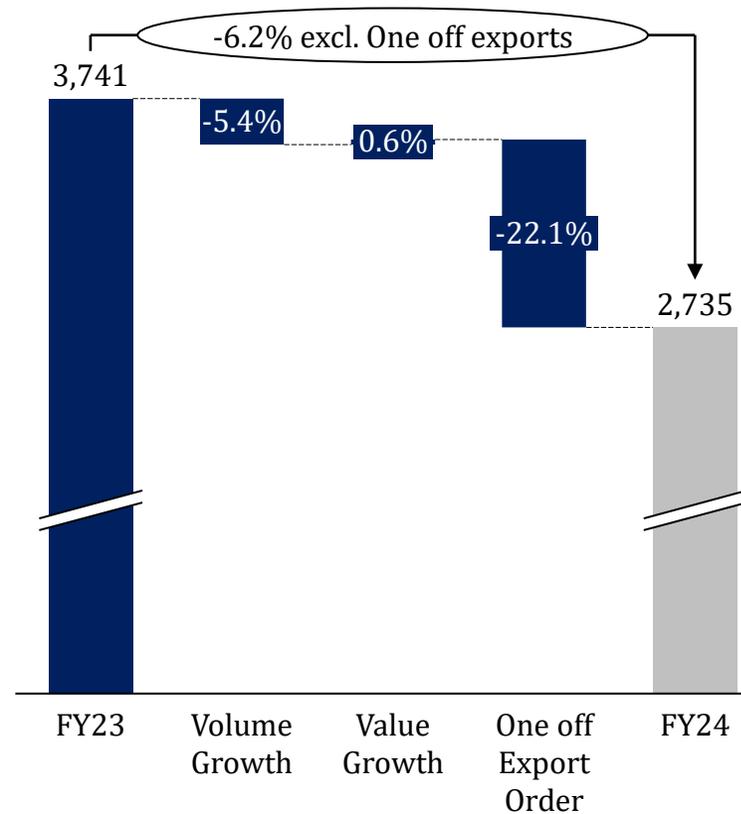
Yarn/knitting & Others Garment Fabric

*FY21 was impacted by Covid related disruptions ; Excludes Other Income

Fabric



Garments



- ✓ Value growth led by better Product Mix
 - Sale of Premium Fabrics was higher in the last fiscal year
- ✓ Exports contributed 9% of the Revenues in FY24
- ✓ Raw Material prices remained volatile in the last year, the price increase is passed on to the end customers with a lag effect
- ✓ In spite of the increase in Raw Material pressure, EBITDA Margins are maintained consistently ~14%

*Excluding Other Income ; Note: Rounded off to the nearest whole number

Profit & Loss Statement

Particulars (₹ in Mn)	FY22	FY23	FY24
Revenue from Operations	19,030	22,293	20,872
Other Income	345	402	375
Total Income	19,375	22,695	21,247
Cost Of Goods Sold	10,739	12,971	12,106
Employee Expenses	1,595	1,791	1,723
Other Expenses	3,354	3,842	4,194
EBITDA	3,687	4,091	3,224
EBITDA Margin (%)	19.0%	18.0%	15.2%
Depreciation	585	578	550
EBIT	3,102	3,513	2,674
EBIT Margin (%)	16.0%	15.5%	12.6%
Finance Cost	181	197	203
Profit before Tax	2,921	3,316	2,471
Profit before Tax(%)	15.1%	14.6%	11.6%
Exceptional Item	53		
Tax	743	798	624
Profit After Tax	2,125	2,518	1,847
PAT Margin (%)	11.0%	11.1%	8.7%
EPS (As per Profit after Tax)	45.3	53.7	39.9

Balance Sheet

Equity & Liabilities (₹ in Mn)	FY22	FY23	FY24
Equity			
Equity Share Capital	94	94	91
Other Equity	9279	11315	11319
Total Equity	9,373	11,409	11410
Non-Current Liabilities			
Financial Liabilities:			
i. Borrowing	368	92	12
ii. Lease Liabilities	73	96	77
iii. Other Financial Liabilities	417	414	402
Provisions	100	94	99
Other Non-Current Liabilities	79	56	36
Deferred Tax Liabilities	107	106	100
Total Non-Current Liabilities	1,144	858	726
Current Liabilities			
Financial Liabilities:			
i. Borrowings	1,747	1,404	1,631
ii. Lease Liabilities	39	35	30
iii. Trade Payables	2,133	1,921	1,642
iv. Other Financial Liabilities	65	49	52
Other Current Liabilities	620	682	529
Provisions	34	40	36
Total Current Liabilities	4,638	4,131	3921
Total Equity & Liabilities	15,155	16,398	16,056

Assets (₹ in Mn)	FY22	FY23	FY24
Non-Current Assets			
Property, plant and equipment	4,728	4,512	4,522
Capital Work-in-Progress	24	54	187
Other Intangible Assets	5	4	4
Investment Property	150	136	127
Right Of Use Assets	96	119	92
Investment in Subsidiaries	109	109	109
Financial Assets:			
i. Investments	170	180	181
ii. Loans	18	22	45
iii. Other	123	110	105
Other non-current assets	31	175	19
Total Non-Current Assets	5,454	5,421	5,391
Current Assets			
Inventories	4,030	4,223	4,657
Financial Assets:			
i. Current Investments	207	1,061	117
ii. Trade Receivable	3,864	4,272	4,677
iii. Cash and Cash Equivalentents	35	35	57
iv. Bank balances other than above	10	12	13
v. Loans	11	21	23
vi. Other Financial Assets	59	2	2
Other Current assets	1,179	1,131	944
Current Tax Assets (Net)	306	220	175
Total Current Assets	9,701	10,977	10,665
Total Assets	15,155	16,398	16,056

Cash Flow Statement

Particulars (₹ in Mn)	FY22	FY23	FY24
Cash Flow from Operating Activities			
Profit before Tax	2,868	3,316	2,471
Adjustment for Non-Operating Items	630	472	488
Operating Profit before Working Capital Changes	3,498	3,788	2,959
Changes in Working Capital	-2,373	-720	-1096
Cash Generated from Operations	1,125	3,068	1,863
Less: Direct Taxes paid	-770	-714	-584
Net Cash from Operating Activities	356	2,354	1,279
Cash Flow from Investing Activities	-549	-1,129	682
Cash Flow from Financing Activities	188	-1,225	-1,939
Net increase/ (decrease) in Cash & Cash equivalent	-6	0	22
Add: Cash and cash equivalents as at 1st April	41	35	35
Cash and cash equivalents as at 31st March	35	35	57

Consistent Returns to Stakeholders since Listing

FY20 ₹ 48.6 Cr Dividend Outlay	FY21 ₹ 21.5 Cr Dividend Outlay	FY22 ₹ 43.1 Cr Dividend Outlay	FY23 ₹ 51.6 Cr Dividend Outlay	FY24 ₹ 108 Cr Buyback (Post Tax) ₹ 49.9 Cr Dividend Outlay
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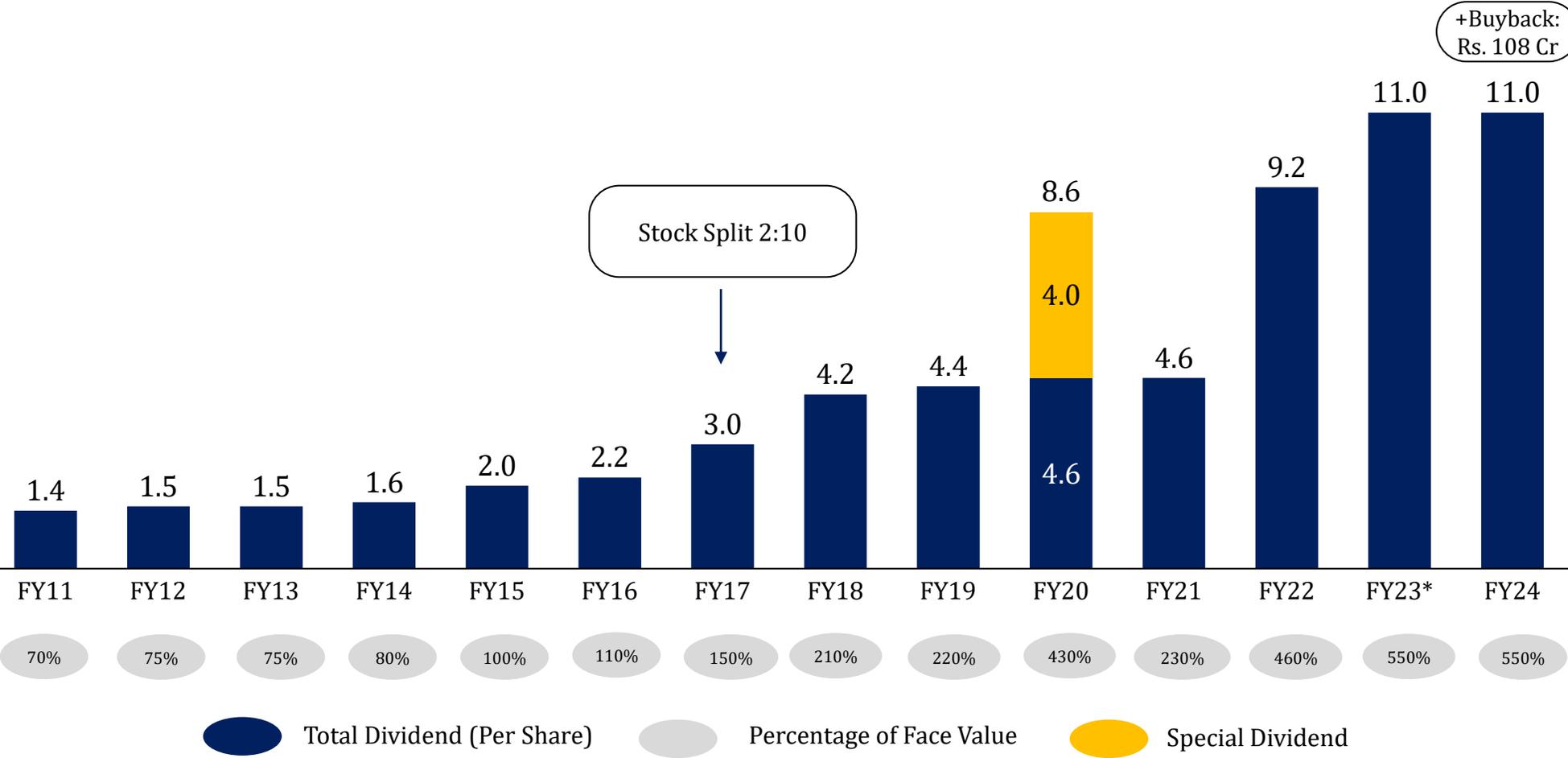
VALUE CREATION FOR SHAREHOLDERS

Robust shareholder returns over the last 10 years

Value creation through stock split in FY17 during which dividend of ₹ 15 (150%) was paid

Dividend paid consistently since listing

Completed Buyback worth ₹ 108 crore



* Adjusted for Split prior to FY17

Well Recognized Brand

Well recognised brand- **“Coming home to Siyaram”** is a well-known tagline in all Indian households

1

Debt to Equity

Debt to Equity of 0.17x with asset light strategy for future expansion

2

Asset Light Model

Asset-light approach for manufacturing & distribution to enhance ROCE

3

Right Portfolio Mix

Well balance range of products, catering to both affordable and luxury segments of consumers

4

Distribution Network

Targeting the sizeable unorganized, fragmented and under-penetrated market through powerful distribution & franchisee network

5

Branded Blended Fabric

Top player in Branded Polyviscose market in India

6

Stakeholder Returns

Consistently delivered balanced growth & sustainable value to its various stakeholders despite strong competition

7



THANK YOU

Company :

Siyaram's

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