

Date: 30th May 2023

The Secretary, National Stock Exchange of India Ltd., Exchange Plaza, C-1, Block 'G', Bandra-Kurla Complex, Bandra (E), Mumbai – 400 051	The Secretary, BSE Limited Phiroze Jeejeebhoy Towers, Dalal Street, Mumbai – 400 001
Symbol - DOLLAR	Scrip Code :541403

Dear Sir /Ma'am

**Reg: Investor Presentation to be made at Analyst(s) / Institutional Investor(s) meeting-
'Earnings Call'**

Pursuant to Regulation 30(6) of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, and further to our intimation dated 24th May 2023 regarding Conference Call viz. 'Earnings Call' for the Analyst(s)/ Institutional Investor(s) scheduled to be held on 31st May 2023 at 4.00 pm (IST) as organized by ICICI Securities, we are hereby enclosing a copy of Investor Presentation to be made on the financials and other matters of the Company at the aforesaid Earnings Call.

Please note that the schedule of the aforesaid Earnings Call is subject to change. The changes might happen due to exigencies on the part of the Company/ Investor(s)/ Analyst(s).

This may please be informed to all the concerned.

Thanking you,
Yours Sincerely,

For Dollar Industries Ltd.

**Mamta Jain
Company Secretary and Compliance Officer**

Encl: As above

DOLLAR INDUSTRIES LTD.

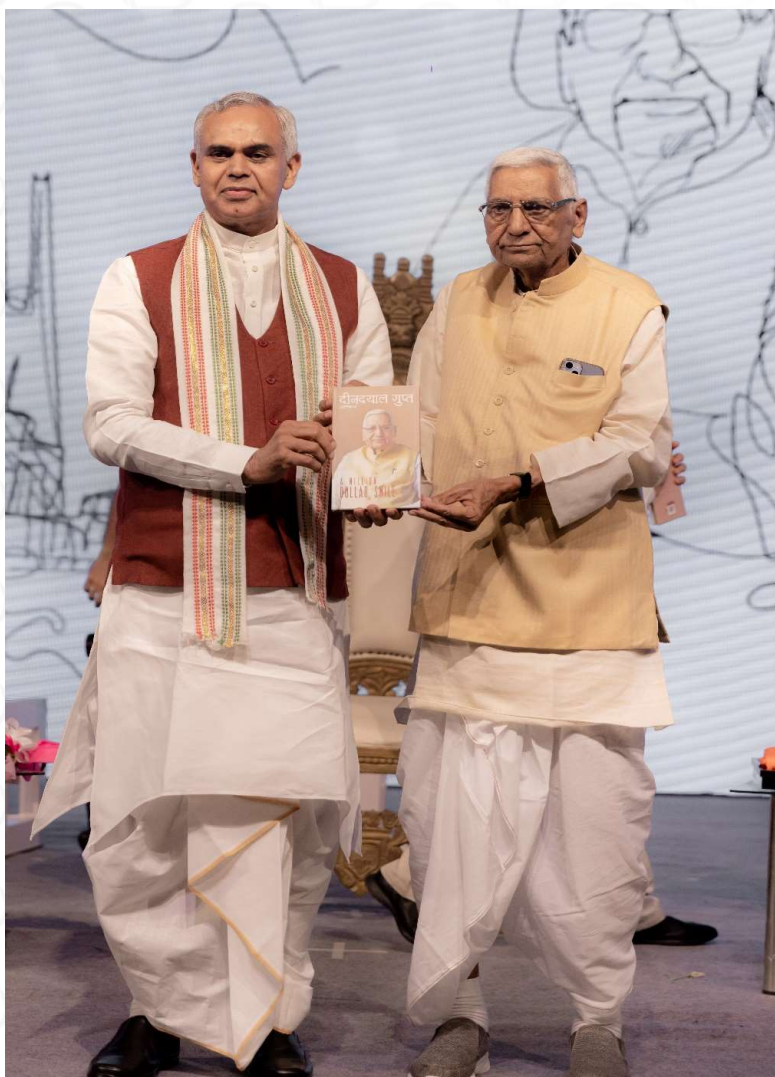
(AN ISO 9001:2015 CERTIFIED ORGANISATION)

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YEARS STRONGER

Dollar Industries Limited
INVESTOR PRESENTATION Q4FY2023



The Warp And Weft Of Memories And Learnings

Over a glittering function attended by the city glitterati, the Biography of Shri Din Dayal Gupta, Chairman Emeritus, Dollar Industries Limited, was launched amidst much fanfare. The book was launched by Shri Acharya Devrat, Hon'ble Governor of Gujarat

'A Million Dollar Smile' chronicles the journey of a young man with dreams in his eyes and a strong conviction in his beliefs who came to the city of joy from a small town of Manheru in Haryana way back in 1962 and started his hosiery business. Over 50 years, Dollar Industries under his leadership has created innumerable benchmarks in its field and graduated from being a hosiery to an apparel brand of international repute with their fibre to fashion methodology.

“From a dream to the reality of creating a market-responsive, multi-brand company that continues to retain its leading position in its category, my life has largely evolved around Dollar Industries. However, there are other facets to it - the struggle, the learning lessons, the presence of human pillars who ensured that I don't crumble and fall on the way. This book touches upon all of it. At my age, I hope it will not only make for an interesting read but also serve as a reminder about how flexibility and openness to change is important as we carry on in life”

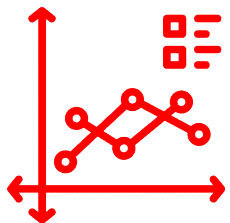
Mr. Dindayal Gupta

Chairman Emeritus & Founder



What's inside

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QUARTER FINANCIAL HIGHLIGHTS

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FY2023 highlights

Opened 14 EBO's till
FY2023.

Growth in revenue by
4% in FY23 vs FY22

Growth in volume by 5%
in FY23 vs FY22

Increase in DFS dealers
from 120 in FY22 to
270 till FY23.

Increase in Contribution
% of Lakshya Distributors
from 8.33% in FY22 to
19% in FY23.

Overall 33% growth in
Modern Trade & E-com
Sales for FY23.

Generated positive cash
flow of Rs.1400 million
from operating Activities

No. of Lakshya
Distributors increased
from 142 in FY22 to 229
in FY23

Modern Trade share of
revenue increased from
3% in FY22 to 4% in FY23

Performance highlights

Performance during the quarter & Year

Figures in Q4FY23

Rs.In Million

4,075.74
Total Revenue

128.25
EBITDA

36.77
Net Profit

Growth in Q4FY23 Over Q4FY22

8%
Total Revenue

-29%
Value

37%
Volume

Figures in FY23

13,985.19
Total Revenue

1,032.71
EBITDA

582.38
Net Profit

Growth in FY23 Over FY22

4%
Total Revenue

-1%
Value

5%
Volume

Financial highlights

Profit & loss statement

Operational performance

Rs.In Million

	Q4FY2023	Q4FY2022	YoY %	FY2023	FY2022	YoY %
Revenue from Operations	4,063.50	3,719.36		13,938.01	13,425.34	
Other Income	12.23	37.88		47.19	65.32	
Total Revenue	4,075.74	3,757.24	8%	13,985.19	13,490.65	4%
Material Consumed	2,437.86	1,713.34		7,577.33	6,146.33	
Subcontracting Expenses	628.29	817.67		2,230.76	2,687.26	
Gross Profit (Excluding other income)	997.35	1,188.36	-16%	4,129.91	4,591.74	-10%
Gross Profit(%)	24.54%	31.95%		29.63%	34.20%	
Employee Benefit Expenses	209.90	187.24		769.12	639.57	
Other Expenses	671.43	447.32		2,375.28	1,785.10	
EBITDA	128.25	591.68	-78%	1,032.71	2,232.39	-54%
EBITDA Margin (%)	3.15%	15.75%		7.38%	16.55%	
Depreciation	42.59	44.81		176.35	165.76	
EBIT	85.67	546.86	-84%	856.36	2,066.63	-59%
EBIT Margin (%)	2.10%	14.55%		6.12%	15.32%	
Finance Cost	34.00	46.42		142.18	96.24	
Profit before Tax	51.67	500.44	-90%	714.18	1,970.39	-64%
PBT Margin (%)	1.27%	13.32%		5.11%	14.61%	
Tax	14.90	129.36		131.79	511.67	
Profit After Tax	36.77	371.08	-90%	582.38	1,458.72	-60%
PAT Margin (%)	0.90%	9.88%		4.16%	10.81%	

Financial highlights

Balance sheet

Particulars	Rs.In Million	
	FY2023	FY2022
A. Assets		
1 Total Non Current Assets	2,317.75	1,737.90
2 Total Current Assets	8,474.97	9,418.40
a) Inventory	3,523.55	4,752.10
b) Trade receivables	4,283.10	4,020.80
c) Other financial Assets	29.96	32.55
d) Other Assets	638.35	613.01
Total Assets	10,792.72	11,156.37
B. Equity & Liabilities		
1. Equity	7,177.00	6,758.19
a) Equity Share Capital	113.43	113.43
b) Other Equity	7,063.57	6,644.76
Liabilities		
2. Non Current liabilities	185.27	111.10
3. Current Liabilities	3,430.45	4,287.08
a) Borrowings	1,614.73	2,049.71
b) Trade payables	1,368.63	1,761.14
c) Other financial liabilities	361.66	314.53
d) Other Liabilities	85.44	161.70
Total Equity & Liabilities	10,792.72	11,156.37

Financial highlights

Cash Flow Statement

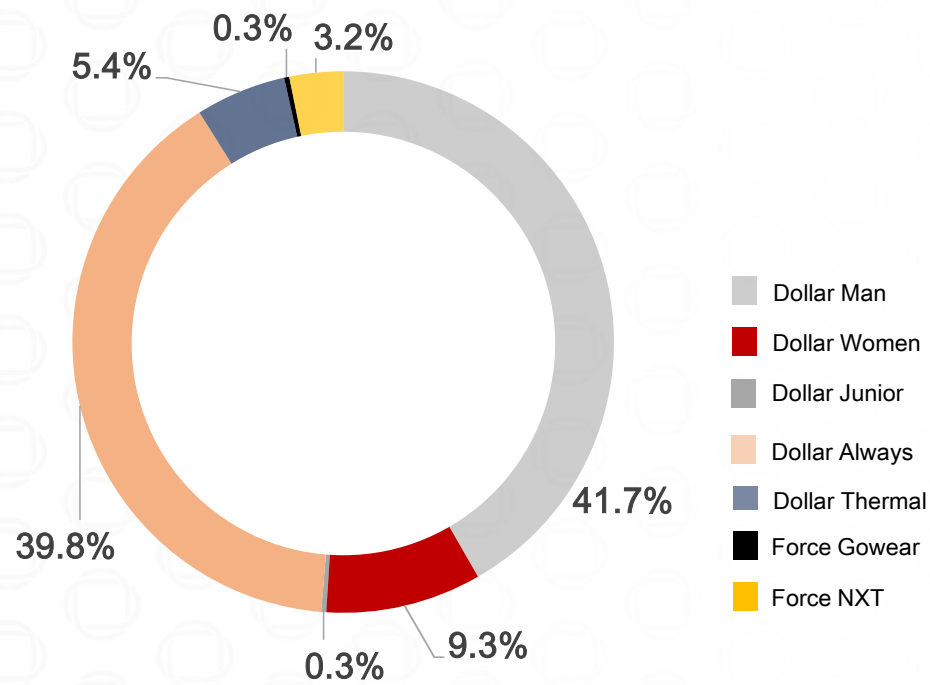
Rs.In Million

Particulars	FY2023	FY2022
Net Profit Before Tax	714.18	1970.39
Adjustment for : Non Cash items/Other Investment or Financial Items	344.65	310.17
Operating profit before Working capital Charges	1,058.82	2,280.55
Changes in Working capital	618.10	-1,830.87
Cash generated from Operating Activities	1,676.93	449.68
Direct taxes paid(net of refund)	281.84	446.24
Net cash from Operating Activities	1,395.08	3.44
Net cash from Investing Activities	-596.21	-618.51
Net cash from Financing Activities	-799.31	547.44
Net Decrease in Cash and Cash equivalents	-0.44	-67.62
Add : Cash & Cash equivalents at beginning of the period	2.06	69.69
Cash & Cash equivalents at the end of the period	1.62	2.06

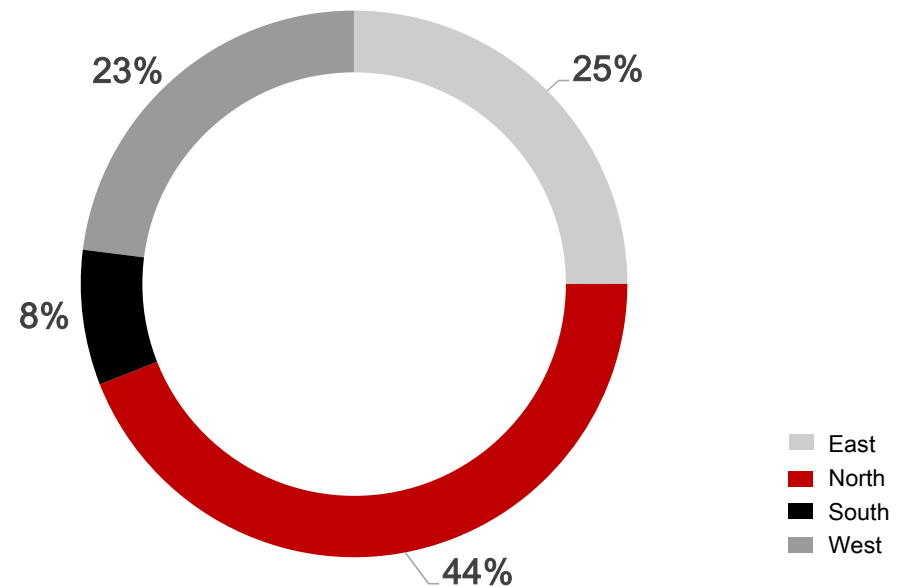
Financial highlights

Revenue contribution FY23

Category wise



Geography wise





GROWTH DRIVERS

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Future-ready

Transformational change

Perceived as a men's innerwear brand



Perceived as a brand for all

Push-based sales model



Replenishment-based sales model

100 retailers per distributors



Active retailers per distributors
150-200 by FY25

4% share of revenue



Share of revenue from modern retail
8% by FY25

6 warehouses across Kolkata



Integrated warehouse by FY23

Rs 1398.51 crore revenue in FY23



Rs. 2,000 crore revenue by FY25

229 distributors up to FY23



Distributors under Project Lakshya
~70% by FY25

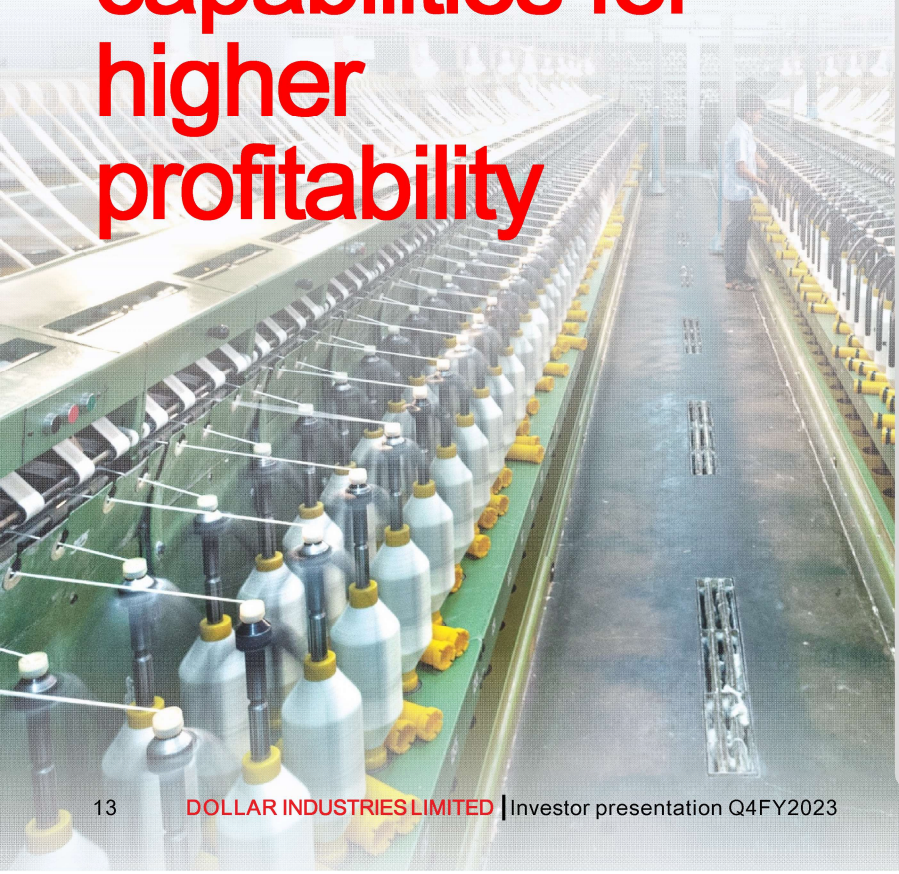
270 distributors up to FY23



Distributors under channel financing
~60% by FY25

Capacity expansions

Improving our capabilities for higher profitability



Integrated warehouse

Investments towards an integrated warehouse in West Bengal

Advantages:

- Improved operational efficiencies
- Cost savings on rent and overheads of multiple warehouses
- Significant reduction of waste and damage
- Better controls over inventory, productivity, quality and efficiency
- Catalysing Project Lakshya distribution expansion and related ERP initiatives

Rs.50 crore

Envisaged investments

FY 2023-2024

Expected commissioning

Expansion of spinning capacity

Increasing our spinning capacity from 22,000 spindles to 42,000 spindles

Advantages:

- Mitigation of irregular supply of yarn through increased production
- Maintaining quality of yarn
- Ensuring no stock outs within the company or with dealers and distributors
- Enabling us to provide quality products at reasonable prices
- Increase of in-house yarn capacity from 400 TPM to 600-700 TPM

Rs.65 crore

Envisaged investments

FY 2023-2024

Expected commissioning

Omni-channel

Pursing growth through EBO



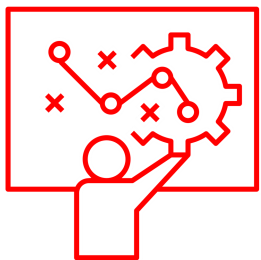
We successfully forayed into the exclusive brand outlet (EBO) segment

Launched 14 EBOs, two each in Delhi, Madhya Pradesh & Punjab One each in UP, Rajasthan, Maharashtra, Gujarat, Haryana & Odisha.

EBO set up under the FOFO model (Franchise-owned franchise-operated)

125

Targeted EBOs by 2025



STRATEGY

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Achieving through our strategic priorities

Strategic priorities



Leveraging new brand overhaul



Investing in digitisation



Growth through Project Lakshya



Partnering for growth



Brand evolution

Changing with the evolving times



2010

Actor Akshay Kumar came on board as brand ambassador. The revamped identity was truly Fit Hai Boss!



2020

The Mnemonic D stands for Dollar, for Dynamism and for the Determination to be a part of every millennial India closet



2005

Dollar hit the airwaves with actor Salman Khan and the identity became an instant hit



1990

The original logo underwent changes to address the demands of an open market economy



1972

Mr. Dindayal Gupta, the founding Chairman, started Dollar in a busy corner of Kolkata

Aligned with the evolving needs of the consumers, Dollar has continuously reinvented itself, shaping its ambition of becoming a brand of choice for its consumers

Branding

Changing the brand architecture



BIGBOSS



ULTRA



J-CLASS



WINTERCARE



MISSY



LEHAR



CHAMPION



ATHLEISURE

Why?

To change the perception that Dollar is just a men's innerwear brand

9.3%

Share of non-men's innerwear revenue in FY23

10%

Share of non-men's innerwear revenue in FY25

What are we doing?

- 5 categories created – MAN, WOMAN, JUNIOR, ALWAYS, THERMALS
- Akshay Kumar as our brand ambassador for Dollar man
- Signed Yami Gautam as our brand ambassador for Dollar Women
- Redesigned our logo to enhance connect with the consumers

Outcomes

- We have been able to significantly enhance our brand recall through our dedicated branding initiatives.
- We now address the needs of a huge consumer spectrum through differentiated price categories: premium, mass premium and economy
- We seamlessly connect with the millennials and cater to their needs

Branding

Catalyst for the mass segment



The advertisement features two men in white tank tops and blue jeans against a dark blue background. The man on the right is Saif Ali Khan, wearing sunglasses and a necklace. The Dollar logo and 'DOLLAR ALWAYS' are prominently displayed, along with the 'LEHAR' brand name and the slogan 'Masti Ki Lehar'. A list of products (VEST | BRIEF | BOXER | PANTY | SOCKS) is shown at the bottom. Social media icons and the website URL 'www.dollarglobal.in' are in the top left, and a '50 GLORIOUS YEARS' anniversary logo is in the top right.

Mr. Saif Ali Khan roped in as brand ambassador for Dollar Lehar

“Dollar Industries, one of the leading hosiery brands in India, has collaborated with Bollywood Actor, Mr. Saif Ali Khan as the face of Dollar Lehar, the affordable product segment of the brand. With Mr Akshay Kumar as the existing brand ambassador for Dollar Bigboss catering to the metro segment, the decision to increase the mass portfolio with a leading Bollywood celebrity is prompted by the growing fashion aspirations across the country’s Tier-2 and Tier-3 cities which strives for stylish yet affordable fashion. Dollar Lehar has a wide range of Innerwear’s like Vest, Bief, Trunk and Panty. The product are available pan India across retail and online stores”

Branding

Diversifying our product portfolio in Men's & Woman segment



Dollar Protect Rainguard Launch

Dollar Protect, the ultimate rainwear line that combines elegance with unbeatable protection! Introducing a wide range of raincoats for men, women and kids, made from premium fabric with additional leak-proof stitching of comprehensive waterproofing. Our commitment to unmatched quality and style ensures that you'll not only stay dry but also make a lasting impression. Crafted with meticulous attention to detail and cutting-edge technology, Dollar's new rainwear line combines fashion and functionality, keeping you dry and looking fabulous even amidst a downpour.

Project Lakshya

Project Lakshya Updates

229

Distributors added until FY23

26

Distributors added in Q4FY23

19%

Share of Revenue of Domestic Sales until FY23

2 new states

Tamil Nadu & Kerala in planning Stage

What are we doing?

- Mapping retail network in area allocated to distributor
- Enrolling retailers into Project Lakshya
- Supply to distributors under the replenishment model

Why?

To reinvent the entire distribution mode and transition from a push model to a replenishment based model

Outcomes

- Increased market penetration
- Increased primary sales and secondary sales
- Faster recovery of dues in retail



Digitalisation

Integrating digitalisation to increase efficiencies

Why?

To integrate digitalisation in our daily operations to increase efficiencies

What are we doing?

- Integrating Auto Replenishment System (ARS) and Distributor Management Systems for our Lakshya distributors
- Implemented ARS at the supply chain level.
- Implementing an after sales service app at the retail level and activity tracker for the sales team
- In process of transitioning from Oracle ERP to SAP
- Integrating automated tele calling for our tele-callers

Outcomes

- Transparent engagements with retailers
- Deeper insights about on-ground realities
- Increased productivity and efficiencies

Partnership

Strategic partnership for sustainable growth

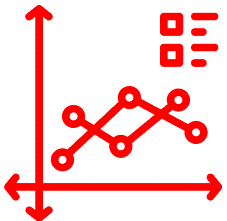


Joint Venture with G.O.A.T

1. We entered into a 51-49 JV with G.O.A.T Brands Lab Pte for Pepe Jeans Innerfashion Pvt. Ltd.
2. G.O.A.T Brands Lab Pte acquired 50% stake of Pepe and additional 2% non-voting equity
3. Multi-brand distributor for men, women and kids' undergarments under athleisure, sportswear, lingerie, leisure wear, sleepwear, lounge wear made of natural fibres and MMF
4. Would undertake business operations in the regions of India, Sri Lanka, Bhutan, Nepal and Bangladesh

Expected outcomes

1. Opportunity to widen our supply of finished goods directly to end consumers through D2C channels.
2. Go for in-organic growth or brand acquisition.
3. Set a foot mark in Super Premium brands



ANNUAL FINANCIAL HIGHLIGHTS

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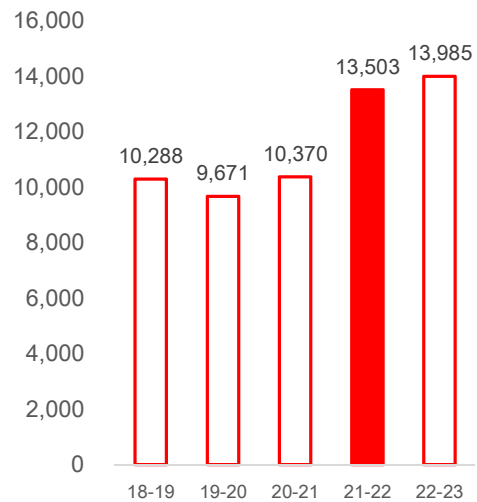
Financial highlights

Performance track record

5-year KPIs

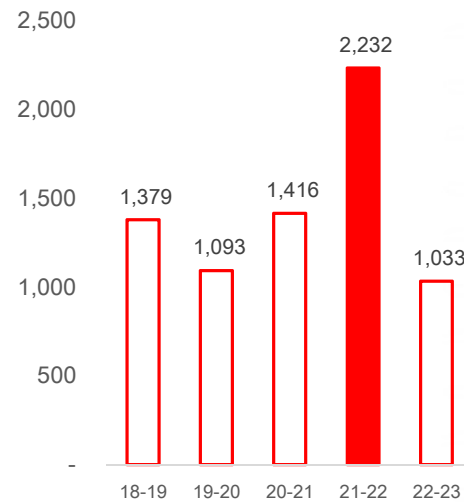
Revenue

Rs In Million



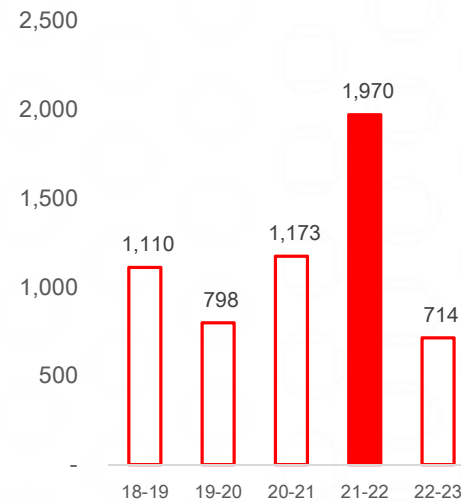
EBITDA

Rs In Million



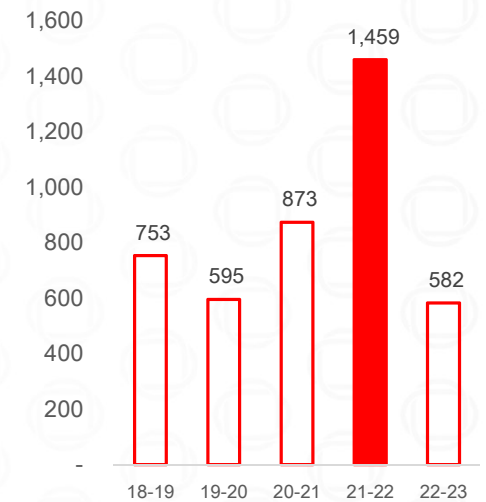
PBT

Rs In Million



PAT

Rs In Million



Financial highlights

Performance track record

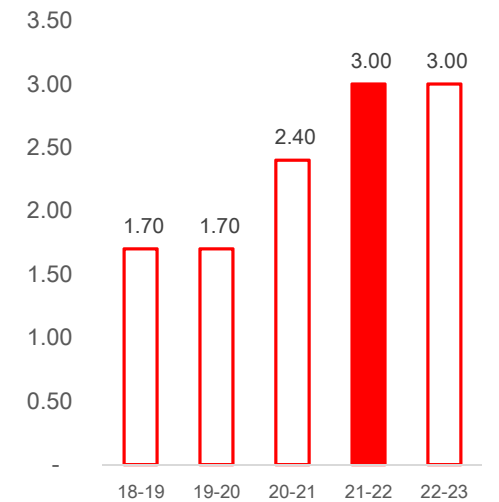
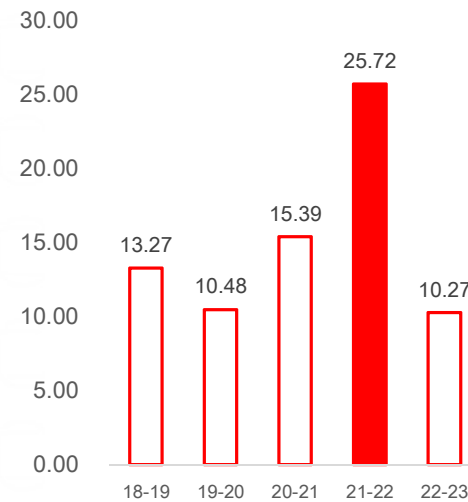
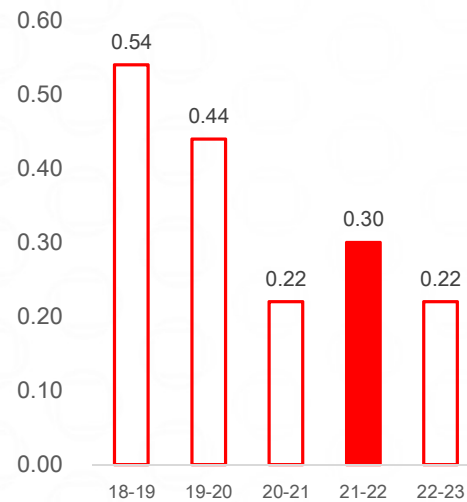
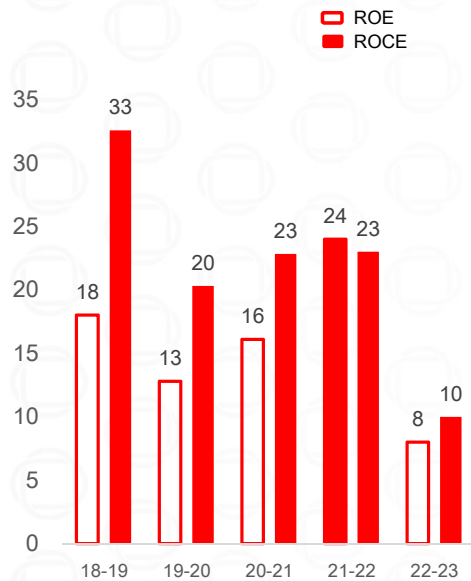
5-year KPIs

ROE & ROCE (%)

Debt-equity Ratio (x)

EPS (Rs)

DPS (Rs)



Financial snapshot

Backed by improving working capital



Strengthening working capital cycle



Improving Balance Sheet health by reducing gearing



Expanding business with focus on newer segments and premiumisation

(days)	FY23	FY22	FY21
Debtor turnover	109	99	121
Inventory cycle	108	109	112
Creditor cycle	57	54	55
Interest cover (x)	7.26	23.20	16.11
Debt-equity (x)	0.22	0.30	0.22

6 days

Increase in working capital days

8%

ROE

10%

ROCE

5%

Return on assets





ESG AT DOLLAR

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Environment

Contributing towards a greener future

Solar power

75 lakh units/year

Power generation capacity of the solar power plant in Tirupur

4 MW

Total power generation capacity commissioned

Wind power

70 lakh units

Total power generated annually

4.95 MW

Total power generation capacity of our four windmills

Zero liquid discharge

13.5 tonnes

Daily production capacity of our effluent treatment plant

1000 KL

Zero liquid discharge capacity with multiple evaporators



Social



Empowering our biggest asset

Employee-centricity



Employee engagement

Engaging with our employees on a daily basis to address their grievances



Skill development

Conducting regular on-the-job and off-the-job training sessions to upskill our employees



Women empowerment

Working towards reducing the gender gap and creating a safe working environment



Diversity and inclusion

Implementing anti-harassment and anti-discrimination policies across all verticals of our Company

Social

Being a responsible corporate



Donated ~Rs 72 lakhs to schools in UP, Rajasthan, Chhattisgarh and Odisha, to ensure underprivileged children have access to quality education

Donated ~Rs 44 lakhs to various hospitals in Bengal for upgradation of medical facilities and equipment

Installed water huts and kiosks across the states of Delhi NCR, Odisha, Rajasthan, Uttar Pradesh and Tamil Nadu, among others

Donated sanitary napkins to the underprivileged women residing in the slums of Kolkata and girl schools

Governance

Strengths that drive



Diverse and experienced
Board of Directors



75% members of the Audit
Committee consist of
Independent Directors



Promoters possess
>3 decades of experience



All members of the
Nomination & Remuneration
Committee are Independent
Directors



Independent Director
account for 50%



We have one Woman
Independent Director on
our Board

Highlights

- Appointed Link Intime India Pvt Ltd as consultant for ESOP
- Reappointed Singhi & Co. as a statutory auditor of the Company

Leadership team

Guided by experienced Directors



Mr. Vinod Kumar Gupta
Managing Director



Mr. Binay Kumar Gupta
Managing Director



Mr. Krishan Kumar Gupta
Whole-time Director



Mr. Bajrang Kumar Gupta
Whole-time Director



Mr. Gopal Krishnan Sarankapani
Whole-time Director



Mr. Rajesh Kumar Bubna
Independent Director



Mr. Binay Kumar Agarwal
Independent Director



Mr. Sandip Kumar Kejriwal
Independent Director



Mr. Srikumar Bandyopadhyay
Independent Director



Mrs. Divya Newatia
Independent Director

Management team

Supported by a experienced team



Mr. Ankit Gupta
President, Marketing



Mr. Gaurav Gupta
Vice-president, Strategy



Mr. Aayush Gupta
Vice-president, Sales



Mr. Ajay Kumar Patodia
Chief Financial Officer



Ms. Mamta Jain
Company Secretary



Mr. Shantanu Banerjee
General Manager – Marcom
and Branding



Mr. Sanjay Srivastava
General Manager –
Sales



Mr. Vedpal Verma
General Manager –
Fabric Division



Mr. Krishna Kumar Soni
General Manager – Spinning
Division

Awards and accolades

Being recognised for our efforts



2021
INDIA'S most
admirable brand
by THE BRAND
STORY



2018
Company of the
Year-Textile

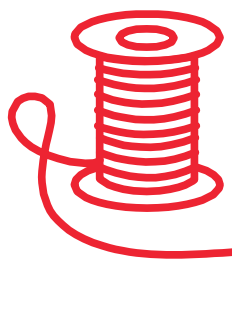
Zee Business Dare
to Dream Awards



2019
" Best in Men's
Hosiery "
TIMES BUSINESS
AWARD



2019
ET's Most
promising brand
Award



COMPANY OVERVIEW

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Dollar at a glance

A leading player in branded outerwear and innerwear

Established in 1972, we have been able to solidify our presence as one of the leading players in the Indian hosiery space.

~210 million

Garment manufacturing
capacity (pieces)

15%

Market share in the
Indian hosiery space

2000+

Products across all
segments of presence

15+ countries

Export presence

04

Manufacturing units

1500+

Strong Pan-India
dealer network

900+

Presence across
large format stores



Ethos

Vision, mission and values



Our Vision

Dollar in everyone's lives.

Medium-term vision: We aspire to metamorphise the Company into an aspirational brand by offering premium and super premium products

Long-term vision: To emerge as a complete brand and distribution company present across multiple categories of fashion wear – from garments to innerwear.



Our Mission

- To emerge as India's leading and most-loved innerwear brand
- To make fashionable yet affordable outerwear and innerwear
- To provide our customers with a higher standard of apparel
- To reach out to customers conveniently (modern trade and e-commerce)
- To outperform industry standards in terms of quality of earnings
- To enhance the lives of people centred around Dollar
- To achieve high governance standards

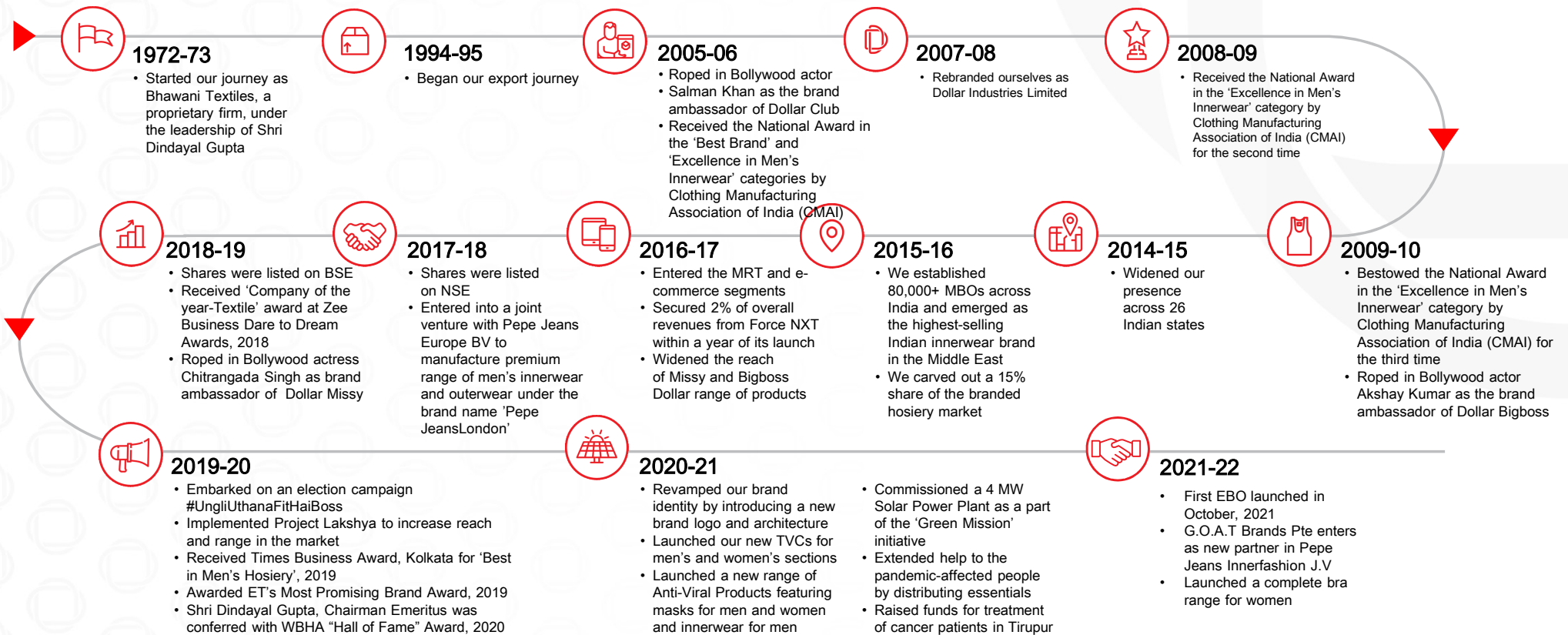


Core Values

- Insights and constant innovation are a way for Dollar. We also add value to the Dollar experience so as to keep it more vibrant and relevant
- The benchmark for Dollar's success is customer satisfaction.
- Dollar delights its customers through a range of products that not only deliver comfort, but are constantly upgraded to keep the styling in line with the latest trends
- Business integrity is the way of life at Dollar. The Company is proud to stand by integrity and transparency in all its dealings and ensures adherence to highest standards of business ethics
- At Dollar, we value time and its optimum utilisation for timely decision making.

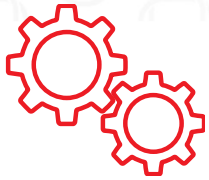
Milestones

Mapping our progress over 50 years



Strengths

Leveraging our strengths to penetrate deeper into affordable branded hosiery market



Integrated operations

Integrated value chain



Wide reach

Channel expansion & Omni Channel strategy



Multi-brand portfolio covering wider user base

Increasing share of non-male users



Favourable financial positioning

Continuously strengthening financials

Value chain

Edging past competition with integrated value chain

2.5 Million

metres per month
Captive elastic
production capacity

400 tonnes

Average monthly
output of Ne 20s to
40s single yarn

400 tonnes

Monthly installed capacity
of bleaching and dyeing

0.3 Million

pieces per day Captive
cutting capacity

300 tonnes

Monthly captive
knitting capacity

Manufacturing facilities:



- Kolkata
- Ludhiana
- Tirupur
- Delhi



Presence

Widening footprint to cater to the wide population

Sales Team 500+	Dealer network 1500+	Retail reach 1,20,000+	
EBOs 14	Branches 14	Depots 15	Warehouses 20+

Multi-platform

E-retail presence     

Modern trade    





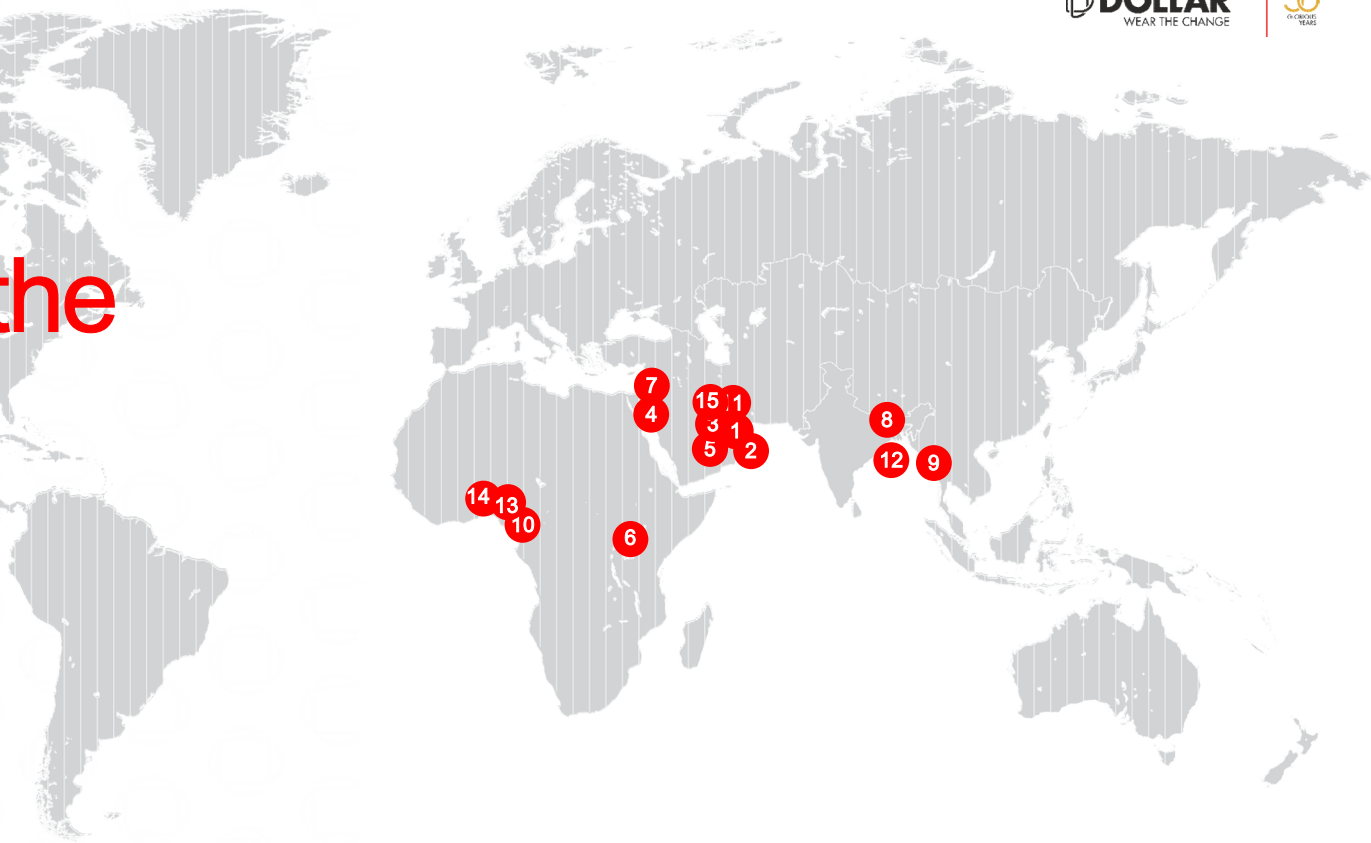
Expanding global reach

Penetrating more countries across the world

Export revenue in FY23



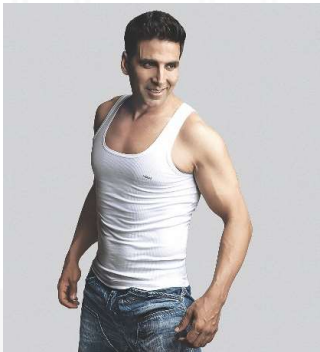
Export revenue in FY25



Where we export			
1. UAE	5. Bahrain	9. Myanmar	13. Benin
2. Oman	6. Tanzania	10. Nigeria	14. Togo
3. Doha	7. Iraq	11. Sharjah	15. Dubai
4. Kuwait	8. Nepal	12. Bangladesh	

Brands

Dollar for all



Dollar Man

Big boss | J-Class | Athleisure

Vests, Briefs, Trunks, Gym vests, Socks, Tank tops, Crew necks, Polos, Henley, Bermudas, Capri, Track pants, Joggers



Dollar Woman

Missy

Leg wears, Casual wear, Bra Camisoles, Panties, Socks



Dollar Junior

Champion

T-shirts, Bermudas, Trousers, Socks



Dollar Always

Lehar

Vests, Briefs, Trunks, Panties, Socks, Camisoles



Dollar Thermals

Ultra | Wintercare

Thermal v-necks, Thermal trousers, Long camisoles, Short camisoles, Socks



FORCE GO WEAR

RKG®

Club®

Standalone Brands

- Force Nxt
- Force Gowear
- RKG
- Club

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Thank you

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