SANGAM (INDIA) LIMITED

CIN: L17118RJ 1984PLC 003173

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Website: www.sangamgroup.com I Ph: +91-1482-245400-06



Ref: SIL/SEC/2024-25

Date: 12th August, 2024

The Manager,

Department of Corporate Services

The National Stock Exchange of India Ltd.

Exchange Plaza, 5th Floor, Plot No. C/1, G Block

Bandra Kurla Complex, Bandra (E)

Mumbai – 400051 Scrip Code: 5251 The Manager,

Department of Corporate Services,

Bombay Stock Exchange Ltd. Phiroze Jeejeebhoy Towers 25th Floor, Dalal Street,

Mumbai - 400 001 Scrip Code: 514234

Dear Sir/Madam,

Sub.: Intimation to Stock Exchange – Investor Presentation in connection with Unaudited Financial Results for the quarter ended 30th June, 2024.

Pursuant to Regulation 30 of Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find enclosed herewith the copy of Investor Presentation in connection with the Unaudited Financial Results for the quarter ended 30th June, 2024.

Kindly take the above on your record.

Yours faithfully For Sangam (India) Limited

Arjun Agal Company Secretary & Compliance Officer ICSI Mem No. 74400





Safe Harbor



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Table of Contents



- 2 Financial Performance 07-09
- 3 Key USPs 10
- 4 Strategic Priorities 17-24
- 5 Industry Outlook 23-25
- 6 Annexures 26-42





Sangam: Weaving The Future



India's largest, fastest growing and most trusted brand in Textile Sector

- One of the largest manufacturer of PV dyed Yarn and Denim Fabric.
- Strong Expertise: 4 decades of Industry experience.
- Skilled Employee Base: Workforce of 12,000+ skilled employees.
- o Marquee Clients: Jockey, Decathlon, Walmart, Mango, Primark & more.
- Fully Integrated Textile Company: Yarn to fabric to garmenting.
- o Market Leaders: PV Yarn, PV Fabric, Denim Fabric

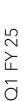
Yarn	Fabric	Denim	Garment

Performance Metrics					
Rs. 693 Cr	25%				
Revenue Q1 FY 25	Revenue CAGR (FY21-24)				
Rs. 67 Cr EBITDA Q1 FY 25	EBITDA CAGR (FY21-24)				
Rs. 14 Cr	113%				
PAT Q1 FY 25	PAT CAGR (FY21-24)				

Note: Revenue and EBITDA don't include Other Income.

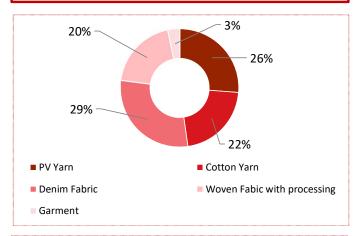
Diversified And De-Risk Business Model

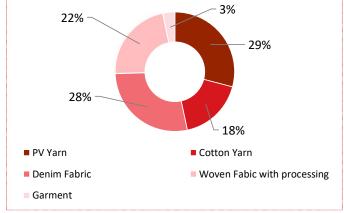




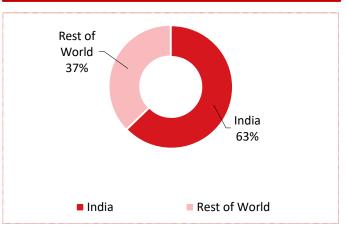
FY 24

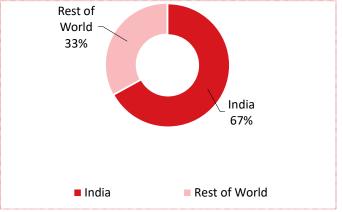
Product Wise Sales Contribution





Geographical Presence

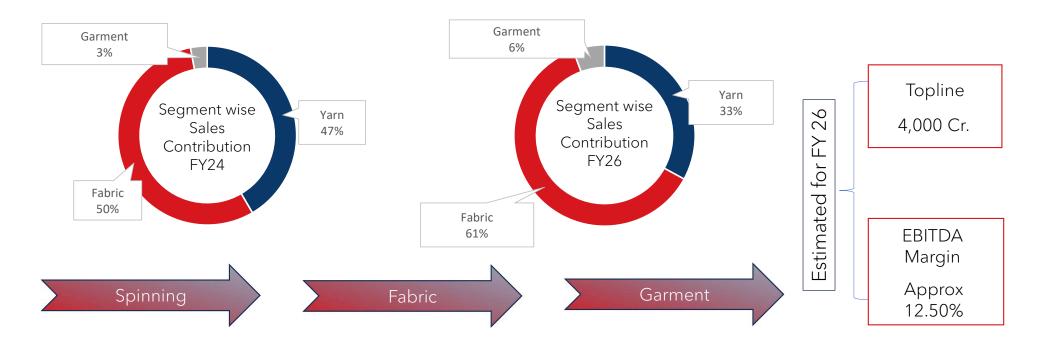




*Note: Numbers rounded off

Vision 2026: Moving up the Value Chain - Fabric & Garments

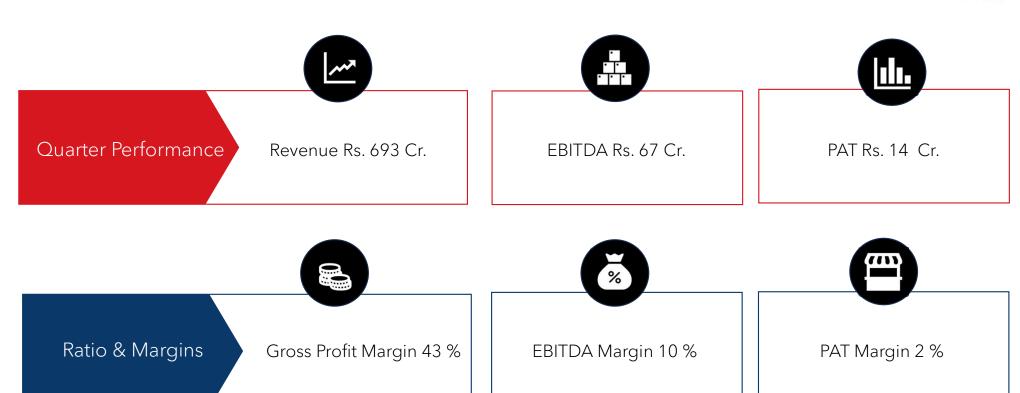






Key Highlights





Q1FY 25 Performance



Particulars (Rs in Cr)	Q1 FY25	Q4 FY 24	QoQ	Q1 FY 24	YoY
Revenue from Operations	693	701	-1%	677	2%
Gross Profit	298	294	1%	273	9%
EBITDA	67	67	1%	54	25%
EBITDA Margin (%)	10%	10%	20 bps	8%	176 bps
Depreciation	28	26	7%	22	29%
Profit Before Interest & Tax	39	41	-3%	32	22%
Interest	23	23	-1%	14	66%
Other Income	5	4	37%	2	112%
Profit Before Tax (After exceptional Item)	20	19	2%	19	3%
Tax	5	6	-5%	6	-15%
Profit After Tax	14	14	5%	13	12%
PAT Margin (%)	2%	2%	11 bps	2%	17 bps
Earnings Per Share Basic (Rs)	2.84	2.75	3%	2.57	11%
Diluted (Rs)	2.84	2.75	3%	2.57	11%



Yarn-Improving The Mix



Key Highlights

- Leader in PV dyed yarn in India.
- Price Maker.

Export yarn to 34+ countries. Established Distribution Network. Yarn Produced: Cotton & PV Dyed. Manufacturer of 100% cotton Yarn: Core Spun Yarn, Eli Twist Yarn & Slub Yarn.

Capacity (as of June 2024)

2,97,744 Spindles 2,664 Rotors

1,03,140 MTPA Yarn production capacity (including knitting machine production)

Unique Features

No. of Customers

(in FY 24): PV Yarn: 760+, Cotton Yarn: 360+ (in Q1 FY25): PV Yarn: 470+, Cotton Yarn: 100+ Latest technology for producing and exporting high quality cotton yarn with different fiber blends.

Plant Locations

Biliya Kalan

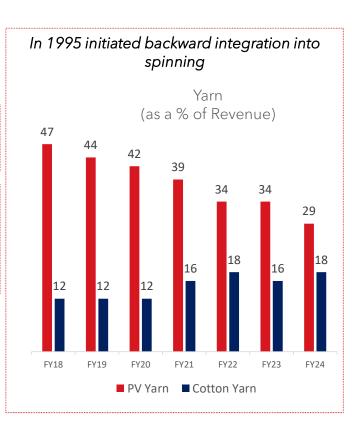
- 96,864 Spindles
- 3 Texturing Machines

Sareri

- 1,74,144 Spindles
- 2,664 Open end rotors
- 26 Knitting machines

Soniyana

• 26,736 Spindles



Garment - Revenue increased 5x in 7 years



Key Highlights

- India's largest manufacturers of Seamless Garments- C9
- Athleisure wear, Intimate wear and Casual Wear
- 2000+ touchpoints.
- FY 24:

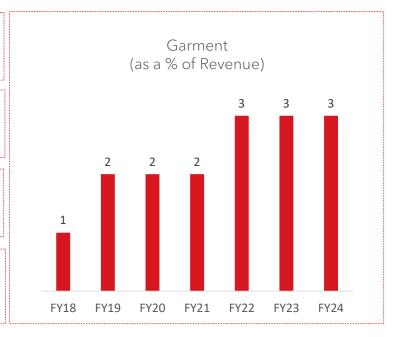
Domestic: 96% Export: 4%

Production Highlights

- Cutting edge machinery sourced from Santoni, Italy.
- Product range: encompasses variety of blends as well as natural fibers.

Unique Features

- Capacity (as of June 2024)
- Revenue increased 5x in 7 years.
- 3% of total revenues of SIL
- 251.94 Crore seconds pa garment manufacturing capacity.
- No of Customers (in FY 24): 1010+ (in Q1FY25): 300+
- 114 seamless garment knitting machines.



Denim Fabric - Revenue increased 2.5x in 7 years



Key Highlights

- One of the largest exporter with exports to 25+ countries and market leader of Denim Fabric in country.
- Producers of wide range of denim fabric ranging from 40zs to 150zs.
- Working with value added yarns taking advantage of in-house yarn capabilities.

Unique Features

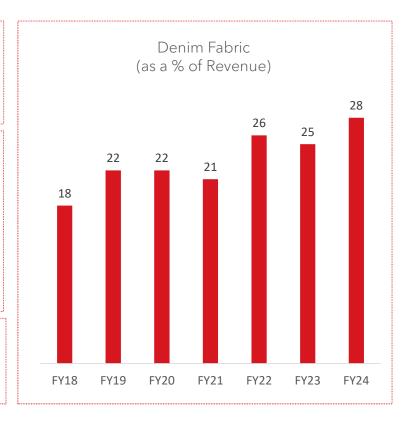
- R&D driven, sustainable product range encompasses Basic, Twills, Broken, Satins, Denim Shirting, Fancy Dobby and Regular Dobby.
- Very strong domestic market position while working with leading brands internationally and domestically.
- State of the art Lab setup for Quality Controls.
- Latest finishing technique such as Flat, Thermo, Mill Wash, Calendar, Over Dyed
- No of customers

(in FY 24): 320+

(in Q1FY25): 210+

Capacity (as of June 2024)

- 60 Million meters per annum Denim Fabric production capacity.
- 5 Indigo processing lines with 302 weaving machines and 1 Rope Dyeing for denim fabric weaving.



Synthetic Fabric - Significant Market Share



Key Highlights

- One of the largest exporter and market leader of PV fabric in country
- Significant market share in processing PV, PV Lycra, PVW, Polyester woolen & 100% wool.
- Strong Distribution
 Network: 10,000+
 Dealers
- Export to 45 + countries.

Capacity (as of June 2024)

- Fabric Weaving- 260 Weaving Machines,
 7 Stenters and 44 Chambers
- Fabric Weaving 48 MMPA
- Fabric Processing 72 MMPA

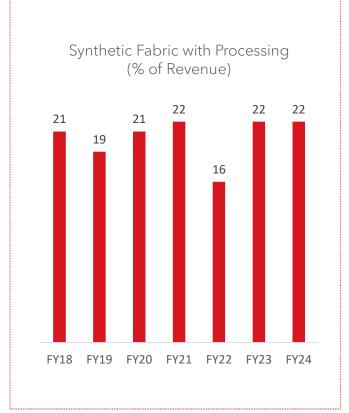
- Manufacturer of finest fabrics in polyester, viscose and other blended fibers
- Working with value added yarns taking advantage of in-house yarn capabilities

Unique Features

- State-of-the-art computerized designing and high speed air jet Weaving Machines.
- Very strong domestic market position while working with leading brands internationally and domestically.
- No of customers (in FY 24): 930+ (in Q1FY25): 680+

Plant Locations

Atun, Bhilwara Rajasthan



Leadership In India: PV Dyed Yarn



Date:14-03-2024



Date: 19-03-2024

"To whom so ever it may concern"

SANGAM SPINNERS A DIVISION OF SANGAM INDIA LTD. BHILWARA IS A REGULAR CUSTOMER OF GRASIM INDUSTRIED LTD. (PULP & FIBER BUSINESS) FOR BUYING THEIR REQUIREMENT OF DYED VISCOSE STAPLE FIBER FOR THEIR SPINNING OPERATION SNCE 1995

This is to certify that currently Sangam India Ltd. Is Largest Dyed Viscose buyer in India from Grasim Industries Ltd.

Thanks!



Ravi Chechani GM – Sales & Marketing GRASIM INDUSTRIES LIMITED AUTHORISED SIGNATORY

 Grasim Industries Limited has 80-85% market share globally.

 Sangam (India) Limited is the largest buyer of Viscose from Grasim.

 Using this Viscose and taking benefit of in-house dying polyester it manufactures PV dyed yarn.

Diverse Offerings



As an integrated player company can manage, multi counts and multi blends like polyester, wool, hemi, linen, cotton, man made blends, natural fibers etc. leading to value added products.

Blends

Engineered

Integration facilitates seamless coordination between different production stages, resulting in enhanced efficiency and reduced lead times.

Optimizing resource

Optimizing resource utilization and offer competitive pricing.

Shades

Sangam has produced more than 20,000+ colors of PV Dyed Yarn which gets converted into fabric.

Technology

Integrated production facility- Control over every stage of production, ensures stringent quality control measures, guaranteeing the superior quality of our products.

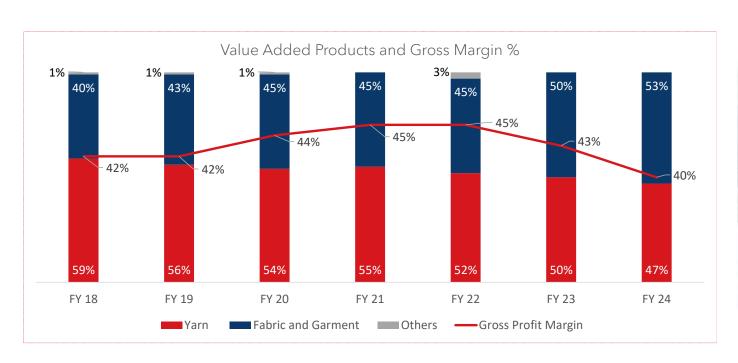




Value Addition Driving Margin Expansion



18



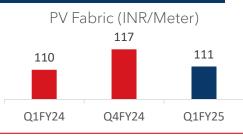
- Increased the revenue mix of value-added products, i.e. Fabric and Garment to 53% of total revenue, effectively mitigating market fluctuations and ensuring steady gross profit margins.
- Company aims to increase the proportion of revenue from fabric and garment to 60% as of FY 26, earning higher margins.

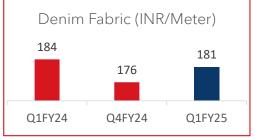


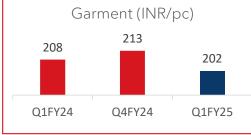
On The Path To Recovery

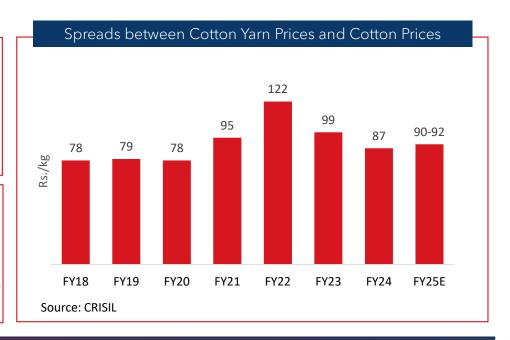












Cotton prices have seen a better turnaround in the sector, and demand as expected have taken a rise. While the recovery has been slow and gradual, both prices and demand are showing encouraging signs of progress. Looking ahead it would be interesting to observe how geopolitical landscape in Bangladesh and budget initiatives impact the market.

^{*}Cotton yarn spreads refer to the difference between the prices of raw cotton (average of domestic and international cotton prices) and domestic cotton yarn

Capacity Expansion to Drive Future Growth



	Capital Outlay	Machines		Capacity		Timeline	
		Current	Post Expansion	Current	Post Expansion	Current Status	Expected
Yarn	344 Cr			1,03,140 MTPA	1,12,440 MTPA	Ongoing	Q1 FY 26
Spindles		2,97,744	3,06,864				
Rotors		2,664	5,064				
Knitting Machines		26	32				
Synthetic Fabric	160 Cr			Weaving-48MMPA	Weaving-65 MMPA	Ongoing	Q4 FY 25
Weaving Machines		260	340				



Cost Competitiveness





Fully integrated model- From Yarn to Fabric operations, Sangam can offer unlimited product combination in unlimited shades in cost effective manner.



Upgradation of facilities and expansion to provide benefits of economies of scale.



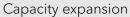
Existing diverse offerings to meet new demands of customers.



Savings in Power & Steam cost due to installation of 44 TPH Agri Husk Boilers and 20 TPH Agri Husk Boiler in Denim division and Synthetic Fabric Division respectively.





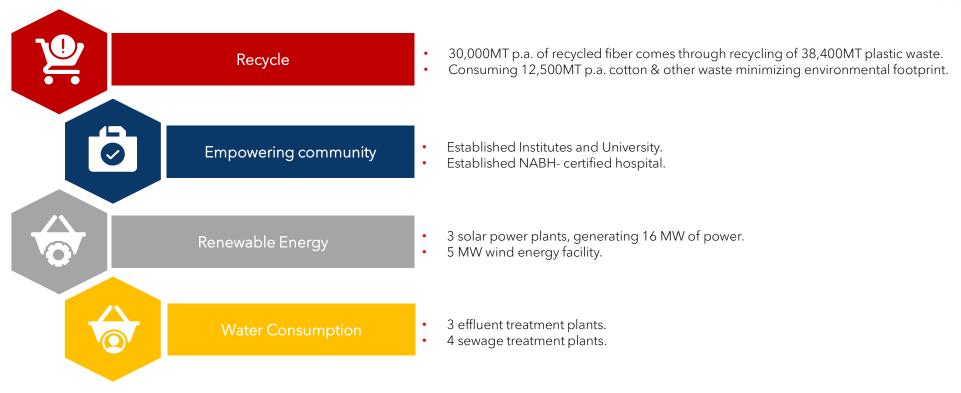






Significant Focus on Sustainability And CSR









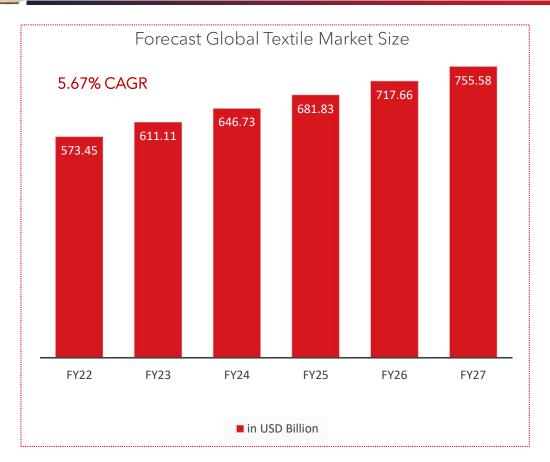
Government Initiatives



Budget Allocation	Increase of ~1,000 Cr. for Ministry of Textiles with the focus to grow and enhance textile sector.
Quality and Skills	Increased funding for specialized programs is designed to enhance skills and innovation, driving the creation of high-value textile products.
Custom Duty	Reduction of custom duty on Methylene Diphenyl Diisocyanate (MDI) for the manufacture of spandex yarn to 5.0% from 7.5%
Textile Parks	"The government is setting up 12 new industrial parks across the country and has 5-6 mega textile parks lined up." Minister of Commerce and Industry Piyush Goyal, 30-Jul2024

Strong Presence in a Growing Sector





Market size of the Indian textile industry is projected to reach USD190bn by 2025-26 from USD99bn in 2021-22.

(Source: Company Annual report FY22-23)

INR190bn

PLI scheme to Textile Industry

7,50,000

Employment opportunities in Textile from PLI scheme

INR44bn

Outlay through PM MITRA scheme

2.3%

Contribution of textiles industry to India's GDP

India is 6th largest exporter of textiles and apparels in the world

Emerging trends towards eco fashion and sustainable clothing

Ability to customize & provide end to end solutions

India is the second largest MMF producer in the world

India has highly skilled workforce and cost-effective production methods









Mr. Ram Pal Soni FOUNDER & CHAIRMAN

- 40 years of rich experience in the textiles industry
- Led the company to be among the world's largest yarn manufacturers.
- Recognized for business acumen, started with 8 weaving machines.



Dr. S.N. Modani VICE CHAIRMAN

- Holds a Ph.D. in strategic management, M.Sc., MBA, and more
- Active in leading industry bodies like FICCI, contributing to HRD.
- Chairman of the The Rajasthan Textile Mills Association" (RTMA) since January 2018.



Mr. Vinod Kumar Sodani ED & CEO (FABRIC & GARMENT BUSINESS)

- Managing PV Suiting and Furnishing business
- Expanded roles from Home Furnishing to Overseas Marketing responsibilities.



Mr. Anurag Soni MANAGING DIRECTOR

- Leads Sangam India Ltd., focusing on finance and operations.
- Drives corporate strategy and future expansions, analysing competitive advantages.
- Manages treasury, emphasizing sustainable business growth.







Mr. Pranal Modani CEO (YARN & DENIM BUSINESS)

- Led successful launch of C9 Airwear, the group's retail venture.
- Active member in entrepreneurship organizations, focusing on global initiatives.
- Spearheads Sangam's ESG initiatives.



Mr. S. R. Dakhera

 He is graduated with B.Sc (Maths) from Rajasthan University and Fellow Chartered Accountant with over 35 years of rich and extensive management Experience Across various Industries.



Mr. Sudhir Maheshwari
INDEPENDENT DIRECTOR

- With a 34-year long career currently he is founding and Managing Partner of Synergy Capital Corp. LLP.
- Former member of Group Management Board, Alternate Chairman of the Corporate Finance & Tax Committee and the Chairman of the Risk Management Committee of Arcelor Mittal.



Dr. T.K. Mukhopadhyay
INDEPENDENT DIRECTOR

- Served 30 years, Chief General Manager at IDBI BANK.
- Currently holds Whole Time Director position, Empanelled Independent Director at Srei Mutual Fund.



Leadership





Mr. Upendra Singh ADDITIONAL DIRECTOR

- More than 37 years of service in IAS, Odisha Cadre he was superannuated as Secretary to Government of India, Ministry of Textiles.
- He also served as secretary, Department of Water Resources, River Development and Ganga Rejuvenation, Ministry of Jalshakti for more than 3 years.



Ms. Irina Garg ADDITIONAL DIRECTOR

- After serving as IRS Income Tax officer for 35 years in Ministry of Finance, Govt. Of India before retiring as the Principal Chief Commissioner of Income Tax, Rajasthan
- She holds a post graduate degree in psychology & a PhD in revenue administration. She also pursued an Executive Programme from Wharton University, Pennsylvania.



Mr. D C Patwari ADDITIONAL DIRECTOR

- Served for 36 years in Indian Revenue Service.
 He have an extensive and varied career in the field of income tax administration.
- He holds an MBA degree from IIM- A. He has also completed Treasury & Forex Management from ICFAI.
- He had also handled investigations related to Securities scam in 1992.



Mr. A. Karati INDEPENDENT DIRECTOR

- Worked in diverse roles at a conglomerate and ICICI Ltd.
- Extensive experience in commercial, legal, and secretarial functions.

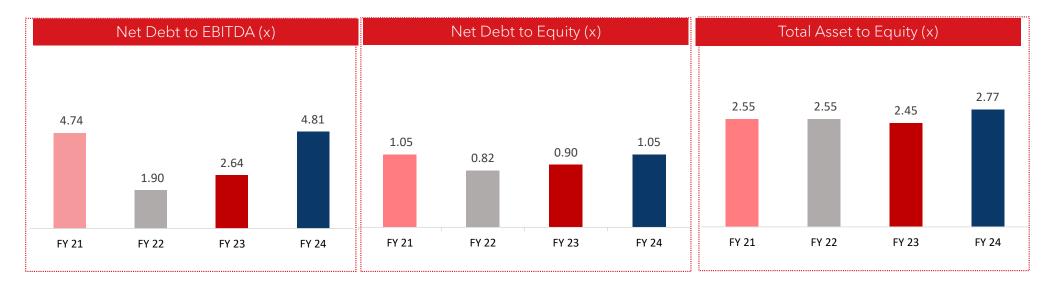


Mrs Aparna Sahay
INDEPENDENT
DIRECTOR

- An MA (Political Science) and MBA by profession.
- She has more than 35-year vast experience in finance, accounts, gender, good governance and environment sector in the Govt. of Rajasthan and in the voluntary sector.

Consolidated Balance Sheet Highlights





Historical Income Statement



Particulars (Rs in Cr)	FY 19	FY 20	FY 21	FY 22	FY 23	FY 24
Revenue from Operations	1,873.53	1,790.11	1,358.97	2,437.76	2,712.30	2,628.06
Total Expenditure	1,714.3	1,628.58	1,236.83	2,130.38	2,410.73	2,412.58
EBITDA	159.23	161.53	122.14	307.38	301.57	215.48
EBITDA Margin %	8%	9%	9%	13%	11%	8%
Depreciation	80.53	81.05	80.58	70.34	79.39	96.81
Profit Before Interest & Tax	78.70	80.48	41.56	237.04	222.18	118.67
Interest	66.61	68.81	49.39	47.80	53.91	71.43
Other Income	9.00	8.47	9.81	7.14	17.14	12.79
Exceptional Items	-	-	-	12.29	25.75	6.64
Profit Before Tax	21.09	20.14	1.98	184.09	159.66	53.39
Tax	7.86	6.86	-2.23	43.44	29.12	12.57
Profit After Tax	13.23	13.28	4.21	140.65	130.54	40.82
PAT Margin (%)	1%	1%	0%	6%	5%	2%
Earnings Per Share Basic (Rs)	3.36	3.37	1.04	32.23	29.41	8.21
Earnings Per Share Diluted (Rs)	3.36	3.37	1.04	32.06	27.26	8.21

^{*}Note: Total Expenditure excluding Depreciation and Finance Cost

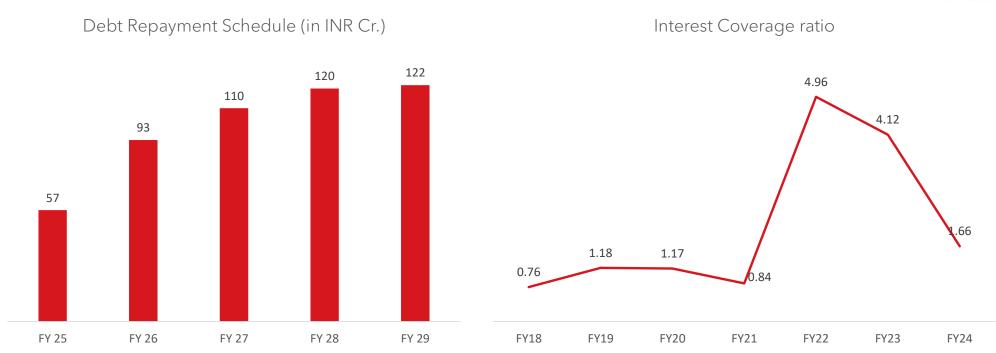
Historical Balance Sheet



Particulars (Rs in Cr)	FY24
(b) Share Warrant - - - 26 23 - Property, Plant and Equipment 648 615 586 595 720 (c) Other Equity 481 488 509 647 815 934 Right of Use Assets - - - - 3 2 Total Equity 521 527 552 716 883 984 Capital Work in Progress 10 6 9 74 223 Non-current Liabilities 521 527 552 716 883 984 Capital Work in Progress 10 6 9 74 223 Non-current Liabilities 521 527 552 716 883 984 Capital Work in Progress 10 1 5 4 3 Other Intangible Assets under development 2 4 - 0 0 0 (a) Borrowing 285 242 204 181 340 619 Financial Assets (b	
(c) Other Equity 481 488 509 647 815 934 Right of Use Assets - - - - - 3 2 Total Equity 521 527 552 716 883 984 Capital Work in Progress 10 6 9 74 223 Non-current Liabilities - - - - - - - - - 3 2 Non-current Liabilities - </td <td></td>	
Total Equity 521 527 552 716 883 984 Capital Work in Progress 10 6 9 74 223 Non-current Liabilities United progress 1 1 5 4 3 Financial Liabilities 1 1 5 4 3 (a) Borrowing 285 242 204 181 340 619 Financial Assets (b) Lease Liability - - - 2 1 0 6 6 0 1 1 Other Non-Current Liabilities & Provisions - - - - - - - 0 6 6 0 1 1	1,004
Non-current Liabilities Other Intangible Assets 1 1 5 4 3 Financial Liabilities Intangible Assets under development 2 4 - 0 0 (a) Borrowing 285 242 204 181 340 619 Financial Assets (b) Lease Liability - - - 2 1 0 (a) Investments 6 6 0 1 1 Other Non-Current Liabilities & Provisions - - - - - 1 10 10 10 10 26 31	1
Financial Liabilities Intangible Assets under development 2 4 - 0 0 (a) Borrowing 285 242 204 181 340 619 Financial Assets (b) Lease Liability - - - - 2 1 0 (a) Investments 6 6 0 1 1 Other Non-Current Liabilities & Provisions - - - - - 10 10 10 10 26 31	219
Calcolor Calcolor	2
(b) Lease Liability - - - 2 1 0 (a) Investments 6 6 0 1 1 Other Non-Current Liabilities & Provisions - - - - 10 19 (b) Other Financial Assets 10 10 10 26 31	3
Other Non-Current Liabilities & 10 19 (b) Other Financial Assets 10 10 10 26 31 Provisions	
Provisions 10 19 (b) Other Financial Assets 10 10 10 26 31	1
Deferred Tax Liabilities (Net) 46 49 49 38 35 36 Other Non-Current Assets 8 6 6 54 114	27
	115
Total Non-Current Liabilities 331 291 253 221 385 675 Total Non-Current Asset 685 648 615 757 1,094	1,372
Current Liabilities Current Assets	
Financial Liabilities 361 373 376 528 513	669
(a) Borrowings 355 359 385 426 484 446 Investments 7	10
(b) Lease Liabilities 1 2 1 Trade Receivables 350 292 280 376 353	448
(c) Trade Payables 165 115 116 287 227 427 Cash and Cash Equivalents 1 14 10 22 28	28
(d) Other Financial Liabilities 137 117 74 132 137 145 Other financial assets 48 50 55 61 56	68
Provisions 14 18 17 19 23 145 Current Tax Assets 8 4 6 - 7	9
Other current liabilities 12 13 10 18 19 37 Other current assets 82 61 66 72 102	124
Current Tax Liabilities 4 Assets Held for Sale 8 -	-
Total Current Liabilities 683 622 603 887 892 1070 Total Current Assets 850 793 794 1,067 1,067	
Total Equity and Liabilities 1,534 1,441 1,409 1,824 2,161 2,729 Total Assets 1,534 1,441 1,409 1,824 2,161	1,357

Comfortable Debt Repayments



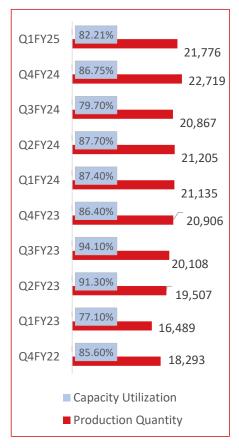


- Debt repayment through internal accruals.
- Capex plans to expand capacity and boost revenue growth.

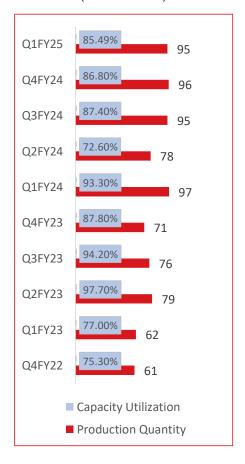
Production Quantity & Capacity Utilization %



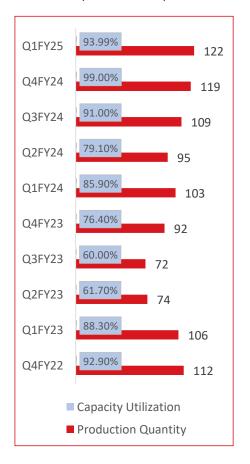




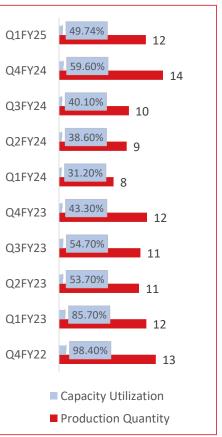
PV Fabric (Lakh Meter)



Denim Fabric (Lakh Meter)

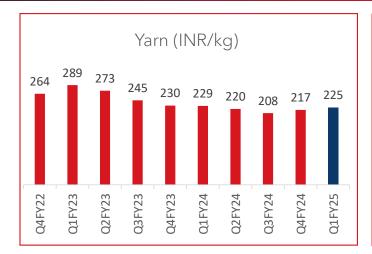


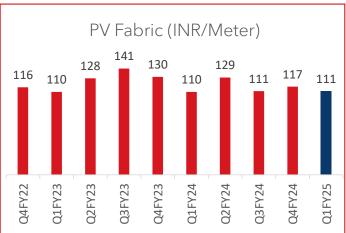
Garment (Lakh pcs)

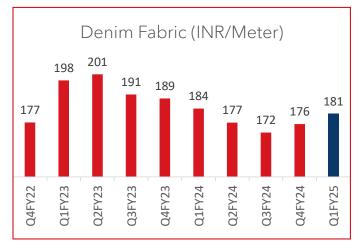


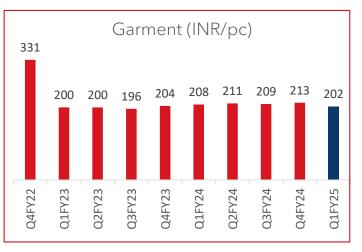
Product wise price realization











Secured PLI

Investment





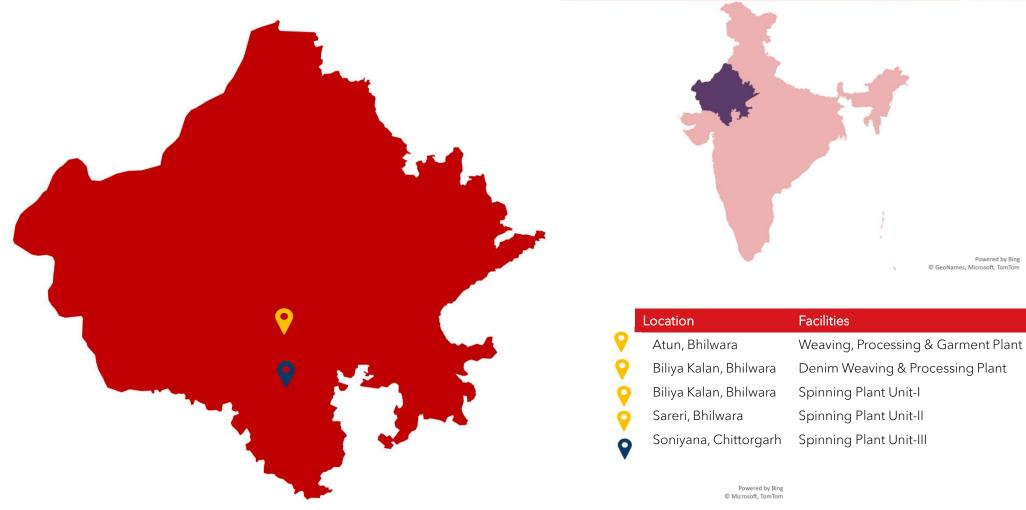
equipment & civil works excluding land &

administrative building cost.



Strong Presence in Rajasthan

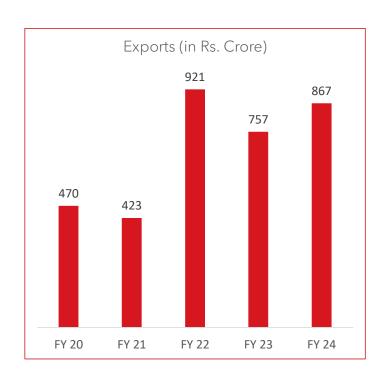




Recognised Four Star Export House



Sangam (India) Limited has been recognized as a four-star export house.





Certifications





QUALITY MANAGEMENT SYSTEMS CERTIFICATIONS



OKEO-TEX STANDARD 100



SOCIAL ACCOUNTABILITY STANDARDS



GLOBAL RECYCLED STANDARD



ORGANIC CONTENT STANDARD

GLOBAL ORGANIC TEXTILE STANDARD

Our Customers































































Awards And Recognitions



TEXPROCIL Export Award 2022-23

Gold Trophy for the Highest Exports of 'Denim Fabrics' under category II TEXPROCIL Export Award 2016-17

Gold Plaque for the Highest Exports of 'Denim Fabrics' under category I "Rajasthan Energy Conservation Award" 2009-10 by Hon'ble Ex-CM of Rajasthan Sh. Ashok Gahlot.

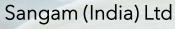
Rajasthan State Award 2008 for Export Excellence in textile sector by Hon'ble Ex-CM of Rajasthan Smt.

Vasundhara Raje.

Textile Excellence Award in 2003 to Sangam
Spinners, by Hon'ble
Shri Narpat Singh Rajvi,
Ex-Minister of Industries,
Government of

Rajasthan.

"Power Brand Rising Star" awarded in year status by Indian Council For Market Research (ICMR) and Planman Consultancy. "Rising Entrepreneur of the Year Award" for outstanding contribution to industry & India rising by Planman Consultancy.



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THANK YOU

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