

Safe Harbor





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Sangam: Weaving The Future

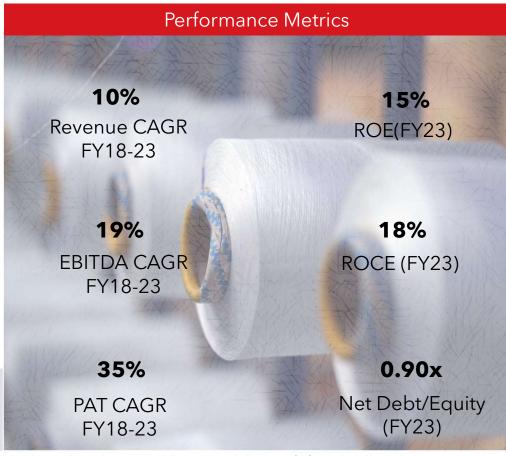


India's largest, fastest growing and most trusted brand in Textile Sector

- 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.
- **Marquee Clients**: Jockey, Decathlon, Walmart, Mango, Primark and many more.
- Fully Integrated Textile Company: Yarn to fabric to garmenting.
- Market Leaders: PV Yarn, PV Fabric, Denim Fabric

2023 KPIs

Rs. 2,712 Crores	Rs. 301 (Crores	Rs. 130 Crores
Revenue	EBITE	DΑ	Net Profit
Yarn	Fabric	Denim	Garment



Note: Revenue and EBITDA don't include Other Income. ROCE is calculated as Earning before Interest and Tax divided by Capital Employed (i.e. Total Assets less Current Liabilities). ROE is calculated as Profit after tax divided by Total Equity (i.e. Equity Share Capital+ Reserve and Surplus+ Money Received against Share Warrants). Net Debt to Equity is calculated as Long and Short-term borrowing less Cash and Cash Equivalents divided by Total Equity.

Key USPs



Presence Across Textiles Value Chain

☑ Diversified and De-Risk Business Model

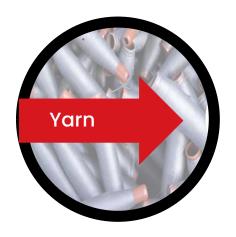
✓ Leadership in India: PV Dyed Yarn

✓ Diverse Offerings



Presence Across Textile Value Chain





FY 23 Revenue

- Contribution: 50%
 Prominent manufacturer and price maker of PV
- Manufacturer of 100% cotton Yarn: Core Spun Yarn, Eli Twist Yarn and Slub Yarn.

dyed Yarn.



FY 23 Revenue Contribution: 22%

- Manufacturer of finest fabrics in polyester, viscose and other blended Fibers.
- High Speed air jet weaving machines.
- Sangam Suiting brand.



FY 23 Revenue Contribution: 25%

- Latest finishing technique such as Flat, Thermo, Mill Wash, Calendar, Over Dyed
- Sangam Denim brand.

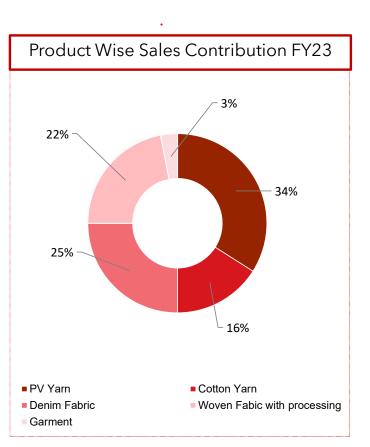


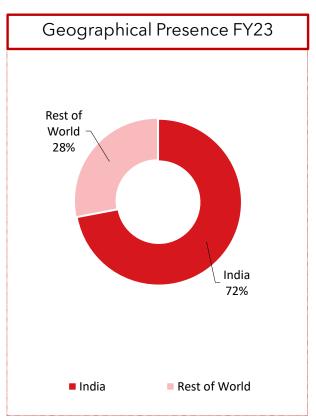
FY 23 Revenue Contribution: 3%

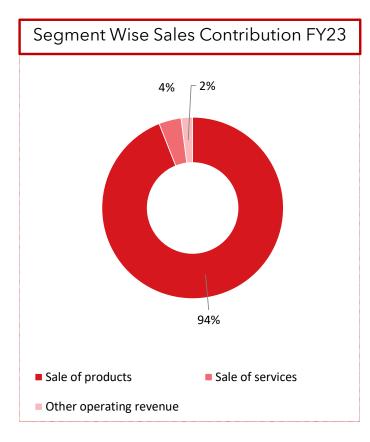
- Seamless garment-C9
- Athleisure wear, intimate wear, shape wear, casual wear.
- Wide variety of product blends.

Diversified And De-Risk Business Model









Leadership In India: PV Dyed Yarn



Date:14-03-2024



Date: 19-03-2024

- 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.

"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!



GM – Sales & Marketing

GRASIM INDUSTRIES LIMITED AUTHORISED SIGNATORY

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.

Belends

Integration facilitates seamless coordination between different production stages, resulting in enhanced efficiency and reduced lead times. Optimizing resource utilization and offer competitive pricing.

Engineered

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.

Management Commentary



"Since our establishment, we have embraced a forward-thinking approach, constantly seeking innovation in both our business strategies and product offerings. We are working towards making our business model resilient by moving up the value chain and enhancing our portfolio of value-added products.

We have delivered good results in a challenging time. Our Industry continues to face headwinds due to subdued demand and complexities in the yarn business. However, it is noteworthy that positive indicators, exemplified by favorable domestic cotton prices relative to global markets, suggest a promising trajectory for the future."



R.P. Soni Chairman, Sangam (India) Limited

Strategic Priorities







Capacity Expansion

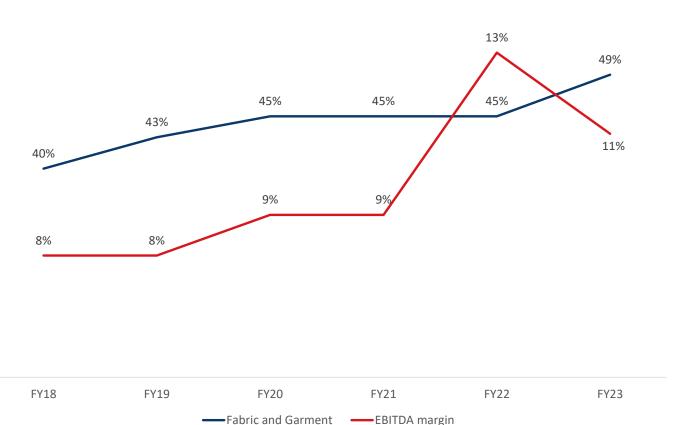
Cost Competitiveness

m Significant Focus On Sustainability

Value Addition Driving Margin Expansion







Last 6 Years (FY 18-FY 23) Our Achievements

Fabric and Garment contribution increasing

EBITDA more than doubled

EBITDA Margin Expansion from 8% to 11%

Improving The Mix Within Yarn



Key Highlights

 Leader in PV dyed yarn in India.

Price Maker.

Export yarn to 29+ countries.

Established Distribution Network.

Capacity (as of Feb,24) 2,97,744 Spindles 2,664 Rotors

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

Unique Features

Yarn produced:

Cotton

PV Dyed

Latest technology for producing and exporting high quality cotton yarn with different fiber blends.

Revenue Contribution: FY18: Cotton yarn -12%; PV dyed yarn-47% FY23: Cotton yarn- 17%; PV dyed yarn-34%

Plant Locations

Biliya Kalan

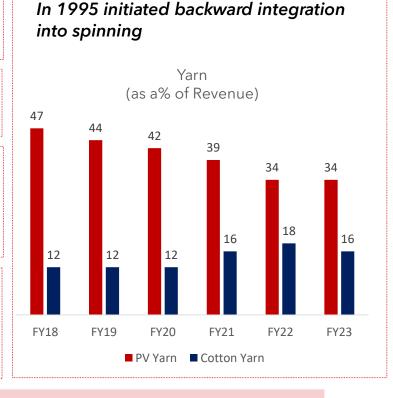
- 96,864 Spindles
- 3 Texturing Machines
- 1 Indigo rope-dyed yarn

Sareri

- 1,74,144 spindles
- 2,664 open end rotors
- 26 knitting machines

Soniyana

26,736 Spindles



The Cotton and PV Yarn Spinning Project:

Undertaking capex expansions for additional spindles and rotors, advancement of technology and new machineries. This modernisation will lead to margin expansion.

Capex Outlay: INR344 Crore

Yarn capacity of Increased 9,300 MTPA

Garment - Revenue increased 4.4x in 6 years



Key Highlights

- India's largest manufacturers of Seamless Garments.
- Innerwear and Activewear for both men and women.
- 4.10 MMPA garments manufactured in FY 23
- 2000+ touchpoints.

Production Highlights

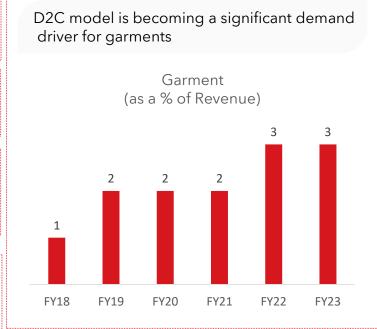
- Cutting edge machinery sourced from Santoni, Italy.
- Domestic: 90%
- Export:10%

Product range: encompasses variety of blends as well as natural fibers.

- **Unique Features**
- Revenue increased 4.4x in 6 years.
- 3% of total revenues of SIL

Capacity (as of Dec,2023)

- 251.94 Crore seconds pa garment manufacturing capacity.
- 114 seamless garment knitting machines.



Denim Fabric - Revenue increased 2.2x in 6 years



Key Highlights

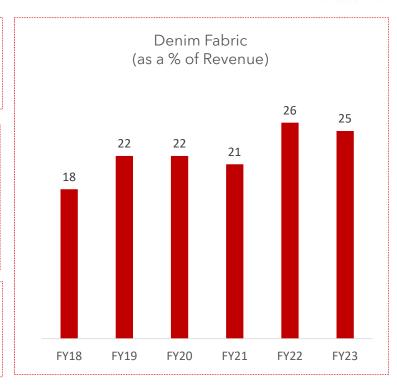
- Producers of wide range of denim fabric ranging from 4Ozs to 15Ozs.
- Sustainable and innovative product range with key focus on R&D.
- Working with value added yarns taking advantage of in-house yarn capabilities.

Unique Features

- One of the largest exporter with exports to 25+ countries and market leader of Denim Fabric in country.
- Denim Fabric product range encompasses Basic, Twills, Broken, Satins, Denim Shirting's, Fancy Dobby, Regular Dobby.
- Very strong positioning of Sangam brand in domestic market.
- Working with leading brands internationally and domestically.
- State of the art Lab setup for Quality Controls.

Capacity (as of Dec,2023)

- 48 million meters per annum Denim Fabric production capacity.
- 5 Indigo processing lines with 302
 Weaving Machines for denim fabric
 weaving.



Denim Expansion Project

Undertaking capex expansions for replacing existing machines with high-speed advanced machine, installing additional new machineries.

Capex Outlay: INR 180 Crore

Increased Denim Fabric Production by 12MMPA and savings in Power & Steam cost due to installation of 44 TPH Agri Husk Boilers.

Synthetic Fabric - Significant Market Share



Key Highlights

- Significant market share in processing PV, PV Lycra, PVW, Polyester woolen & 100% wool.
- Working with value added yarns taking advantage of in-house yarn capabilities.

Strong Distribution

Network: 10,000+ Dealers

Capacity
(as of Dec,2023)

Fabric Weaving 260 Weaving Machines

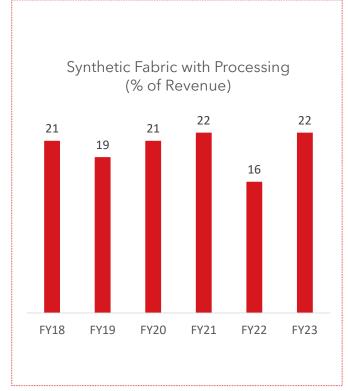
Fabric Processing 72 MMPA

Unique Features

- State-of-the-art computerized designing Weaving Machines.
- One of the largest exporter and market leader of PV fabric in country. Export to 45 + countries.
- Working with leading brands internationally and domestically.
- Very strong positioning of Sangam suiting brand in domestic market.
- Wide product range: Polyester/ Viscose, PV Lycra, PVW, Polyester Woolen &100% wool.

Plant Locations

Atun, Bhilwara Rajasthan



Undertaking capex expansions for additional looms, advancement of technology and new machineries which will lead to additional production of 30 MMPA.

PV Fabric Expansion Project 1

Capex Outlay: INR 108 Crore

67 new Weaving Machines to be added.

PV Fabric Expansion Project 2

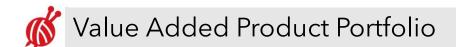
Capex Outlay: INR 160 Crore

44 new Weaving Machines to be added.

Strategic Priorities







Capacity Expansion

Cost Competitiveness

m Significant Focus On Sustainability

Capacity Expansion To Drive Future Growth



	Current* Machines	Post Expansion	Expected Completion
Spindles	2,97,744	3,06,864	Q1 FY26
Rotors	2,664	5,064	Q1 FY26
Knitting Machines	26	32	Q1 FY26
Weaving Machines	562	642	Q3 FY25
Finishing Lines	4	5	Q1 FY25

	Capital Outlay	Current* Capacity	Post Expansion
Denim	INR 180 Crore	48 MMPA	60 MMPA
Synthetic Fabric	INR 268 Crore	Weaving-48MMPA Processing-72 MMPA	Weaving-65 MMPA Processing-72 MMPA
Yarn	INR 344 Crore	1,03,140 MTPA	1,12,440 MTPA

*Note: Data as of February,2024

Strategic Priorities







Capacity Expansion

Cost Competitiveness

m Significant Focus On Sustainability

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.



Strategic Priorities







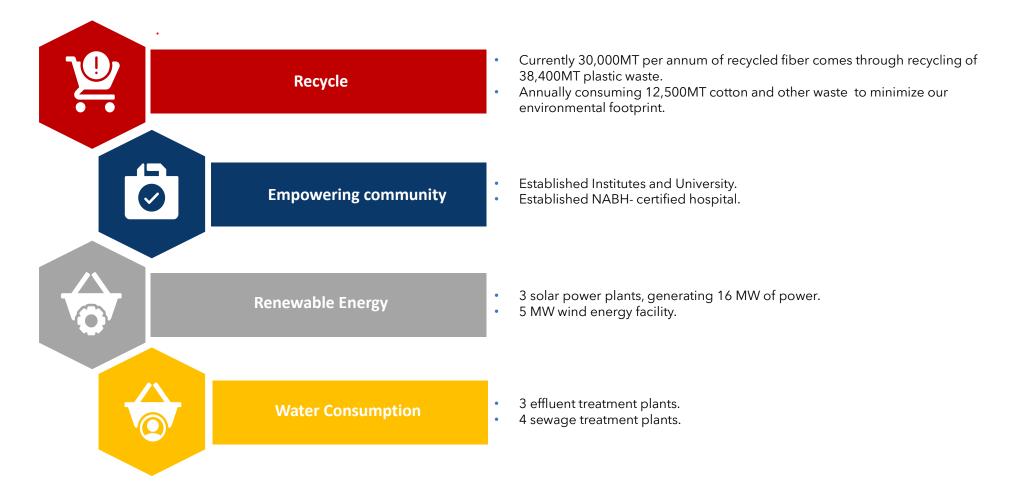
Capacity Expansion

Cost Competitiveness

m Significant Focus On Sustainability

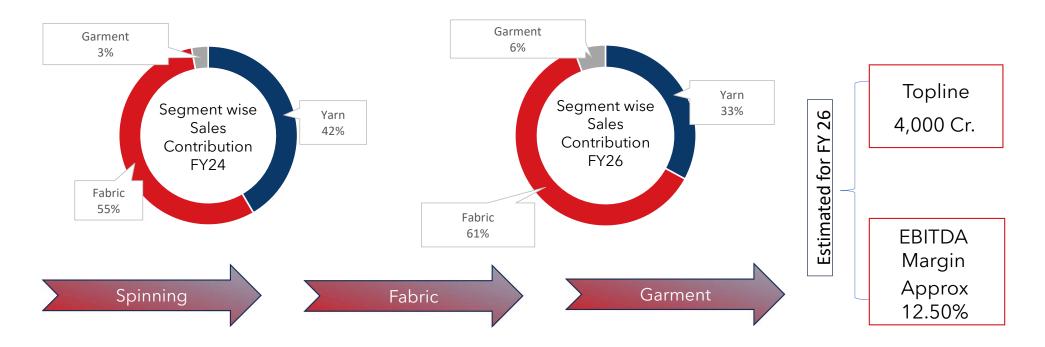
Significant Focus on Sustainability





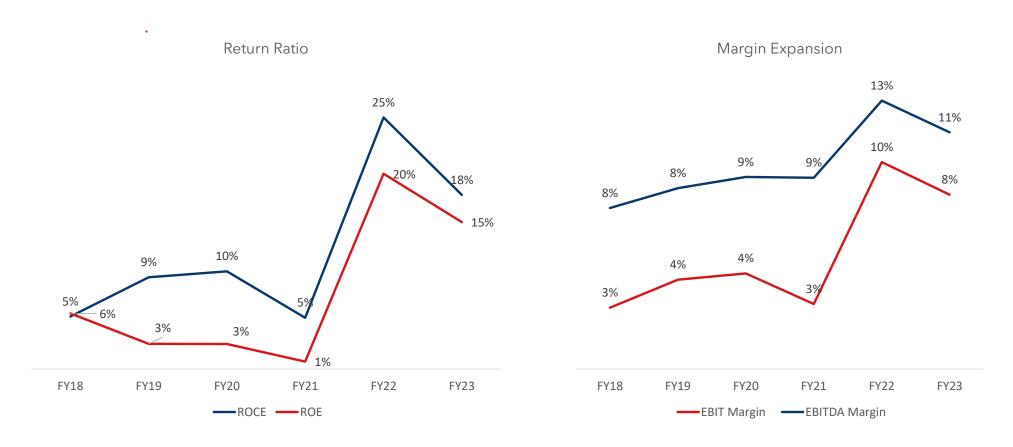
Vision 2026: Moving up the Value Chain - Fabric & Garments





Creating Shareholder Value

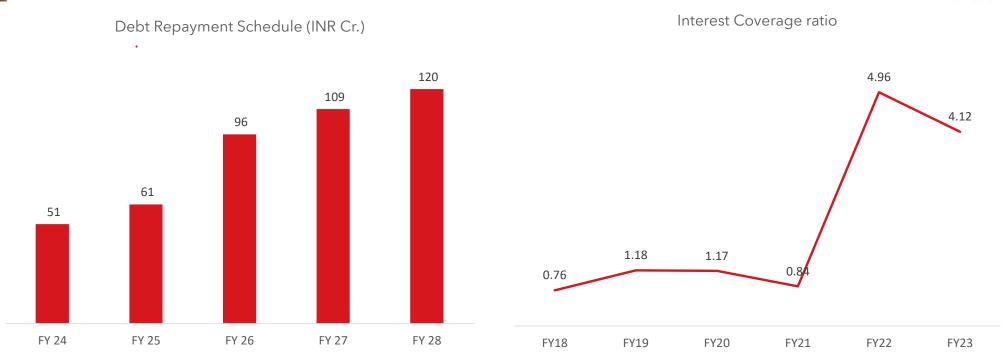




Note: ROCE is calculated as Earning before Interest and Tax divided by Capital Employed (i.e. Total Assets less Current Liabilities). ROE is calculated as Profit after tax divided by Total Equity (i.e. Equity Share Capital+ Reserve and Surplus+ Money Received against Share Warrants). EBIT and EBITDA margin do not include Other income.

Comfortable Debt Repayments: Funded from Internal Accruals

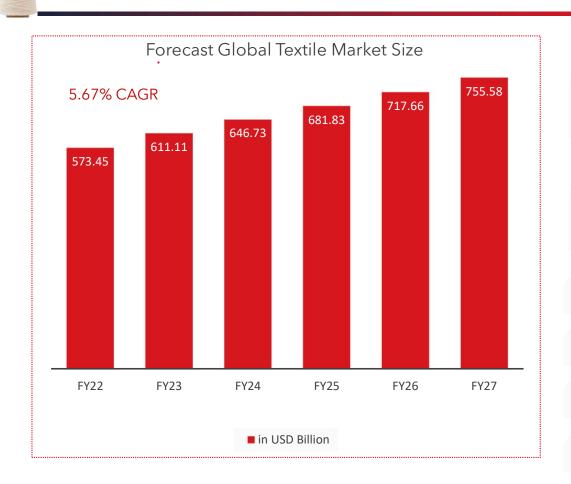




- Debt repayment through internal accruals.
- Capex plans to expand capacity and boost revenue growth.

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.

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 6^{th} 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

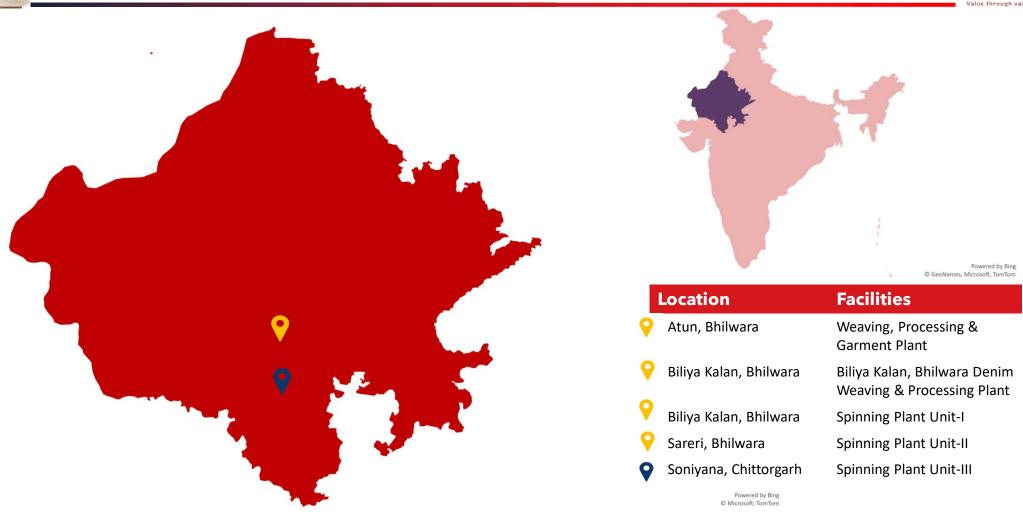
India has highly skilled workforce and cost-effective production methods



Annexure

Strong Presence in Rajasthan











Mr. Ram Pal Soni FOUNDER & CHAIRMAN

- 30 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. 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.



Mr. Yaduvendra Mathur
INDEPENDENT
DIRECTOR

- Former Officer of Indian Administrative Service, joined in January 2021.
- CMD of Export Import Bank of India, associated with African Development Bank.
- Ranked first in the 1986 IAS seniority, awarded three gold medals.



Dr. T.K. MukhopadhyayINDEPENDENT
DIRECTOR

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



Mr. A. Karati INDEPENDENT DIRECTOR

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



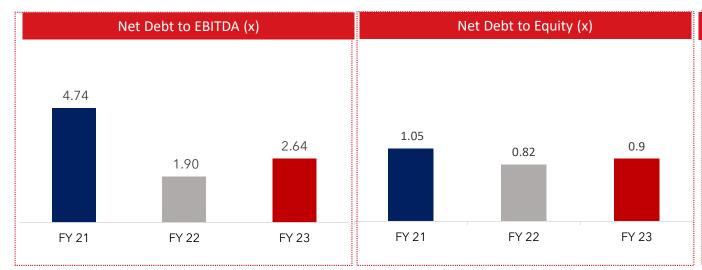
Mrs Aparna Sahay
INDEPENDENT
DIRECTOR

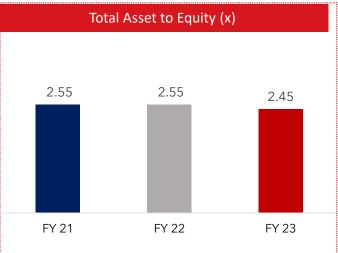
- An MA (Political Science) and MBA by profession.
- She has more than 35-year vast experience in finance, accounts, gender, good governance and environment sector in the Govt. of Rajasthan and in the voluntary sector.

Consolidated Balance Sheet Highlights









Historical Income Statement



Particulars (Rs in Cr)	FY 19	FY 20	FY 21	FY 22	FY 23	9M FY 24
Revenue from Operations	1,873.53	1,790.11	1,358.97	2,437.76	2,712.30	1,926.94
Total Expenditure	1,714.3	1,628.58	1,236.83	2,130.38	2,410.73	1,778.15
EBITDA	159.23	161.53	122.14	307.38	301.57	148.79
EBITDA Margin %	8%	9%	9%	13%	11%	8%
Other Income	9.00	8.47	9.81	7.14	17.14	9.11
Depreciation	80.53	81.05	80.58	70.34	79.39	70.69
Profit Before Interest & Tax	78.70	80.48	41.56	237.04	222.18	78.1
Interest	66.61	68.81	49.39	47.80	53.91	48.09
Profit Before Tax	21.09	20.14	1.98	184.09	159.66	34.14
Tax	7.86	6.86	-2.23	43.44	29.12	6.98
Net Profit	13.23	13.28	4.21	140.65	130.54	27.16
PAT Margin (%)	1%	1%	0%	6%	5%	1%
Earnings Per Share Basic (Rs)	3.36	3.37	1.04	32.23	29.41	5.46*
Earnings Per Share Diluted (Rs)	3.36	3.37	1.04	32.06	27.26	5.46*

^{*} Cumulative amount of Earnings per share of three quarters.

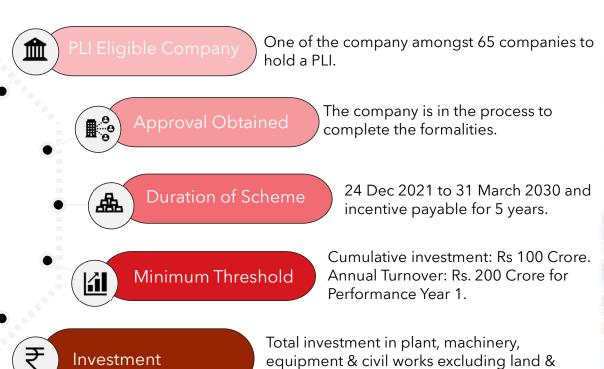
Historical Balance Sheet



													through values
Particulars (Rs in Cr)	FY 19	FY 20	FY 21	FY 22	FY 23	H1 FY24	Particulars (Rs in Cr)	FY 19	FY 20	FY 21	FY 22	FY 23	H1 FY24
(a) Equity Share Capital	39.42	39.42	43.42	43.42	45.05	50.25	Non-Current Assets						
(b) Share Warrant	0	0	0	25.65	23.40	0	Property, Plant and Equipment	647.52	615.41	585.7	594.75	719.63	913.92
(c) Other Equity	481.28	487.70	508.92	646.86	814.68	916.89	Right of Use Assets	0	0	0	3.49	2.40	1.63
Total Equity	520.70	527.12	552.34	715.93	883.13	967.14	Capital Work in Progress	10.14	6.02	8.81	73.93	222.98	196.89
Non-current Liabilities							Other Intangible Assets	0.88	0.81	4.61	3.54	3.24	2.83
Financial Liabilities							Intangible Assets under development	1.68	3.56	0	0.14	0.09	0.78
(a) Borrowing	285.17	242.28	204.37	180.55	339.53	425.85	<u>Financial Assets</u>						
(b) Lease Liability	0	0	0	2.19	0.95	0.36	(a) Investments	5.85	5.85	0.04	0.79	0.75	0.75
Other Non-Current Liabilities	0	0	0	0	10.11	0	(b) Other Financial Assets	10.21	9.50	9.89	26.49	30.99	34.66
Deferred Tax Liabilities (Net)	45.98	49.11	48.95	37.86	34.7	32.60	Other Non-Current Assets	8.37	6.39	5.91	54.02	113.94	128.57
	_							•					
Total Non-Current Liabilities	331.15	291.39	253.32	220.60	385.29	458.81	Total Non-Current Asset	684.65	647.54	614.96	757.15	1,094.02	1,280.03
	331.15	291.39	253.32	220.60	385.29	458.81	Total Non-Current Asset Current Assets	684.65	647.54	614.96	757.15	1,094.02	1,280.03
Liabilities	331.15	291.39	253.32	220.60	385.29	458.81		360.8	647.54 372.78	614.96 376.35	757.15 527.97	1,094.02 513.36	1,280.03 506.04
Liabilities Current Liabilities	331.15 355.07	291.39 358.99	253.32 385.13	220.60 426.14	385.29 484.2	505.32	Current Assets						
Liabilities Current Liabilities Financial Liabilities							Current Assets Inventories	360.8	372.78	376.35	527.97	513.36	506.04
Liabilities Current Liabilities Financial Liabilities (a) Borrowings (b) Lease Liabilities (c) Trade Payables	355.07	358.99	385.13	426.14	484.2	505.32	Current Assets Inventories Investments	360.8	372.78 0	376.35 0	527.97 0	513.36 6.86	506.04
Liabilities Current Liabilities Financial Liabilities (a) Borrowings (b) Lease Liabilities	355.07	358.99	385.13 0	426.14 1.43	484.2 1.65	505.32 1.45	Current Assets Inventories Investments Trade Receivables	360.8 0 349.88	372.78 0 291.55	376.35 0 280.01	527.97 0 376.43	513.36 6.86 352.82	506.04 8.12 416.81
Liabilities Current Liabilities Financial Liabilities (a) Borrowings (b) Lease Liabilities (c) Trade Payables (d) Other Financial	355.07 0 164.58	358.99 0 114.66	385.13 0 116.07	426.14 1.43 287.43	484.2 1.65 226.87	505.32 1.45 249.71	Current Assets Inventories Investments Trade Receivables Cash and Cash Equivalents	360.8 0 349.88 0.68	372.78 0 291.55 13.65	376.35 0 280.01 10.10	527.97 0 376.43 22.3	513.36 6.86 352.82 27.97	506.04 8.12 416.81 20.69
Liabilities Current Liabilities Financial Liabilities (a) Borrowings (b) Lease Liabilities (c) Trade Payables (d) Other Financial Liabilities	355.07 0 164.58 137.31	358.99 0 114.66 150.13	385.13 0 116.07 74.46	426.14 1.43 287.43 131.9	484.2 1.65 226.87 137.25	505.32 1.45 249.71 158.64	Current Assets Inventories Investments Trade Receivables Cash and Cash Equivalents Other financial assets	360.8 0 349.88 0.68 47.86	372.78 0 291.55 13.65 49.52	376.35 0 280.01 10.10 55.21	527.97 0 376.43 22.3 60.58	513.36 6.86 352.82 27.97 56.08	506.04 8.12 416.81 20.69 41.74
Liabilities Current Liabilities Financial Liabilities (a) Borrowings (b) Lease Liabilities (c) Trade Payables (d) Other Financial Liabilities Provisions	355.07 0 164.58 137.31 13.51	358.99 0 114.66 150.13 17.52	385.13 0 116.07 74.46 16.96	426.14 1.43 287.43 131.9 18.99	484.2 1.65 226.87 137.25 23.31	505.32 1.45 249.71 158.64 31.98	Current Assets Inventories Investments Trade Receivables Cash and Cash Equivalents Other financial assets Current Tax Assets	360.8 0 349.88 0.68 47.86 8.35	372.78 0 291.55 13.65 49.52 4.45	376.35 0 280.01 10.10 55.21 5.65	527.97 0 376.43 22.3 60.58	513.36 6.86 352.82 27.97 56.08 7.01	506.04 8.12 416.81 20.69 41.74 8.85
Liabilities Current Liabilities Financial Liabilities (a) Borrowings (b) Lease Liabilities (c) Trade Payables (d) Other Financial Liabilities Provisions Other current liabilities	355.07 0 164.58 137.31 13.51 12.08	358.99 0 114.66 150.13 17.52 10.35	385.13 0 116.07 74.46 16.96 10.35	426.14 1.43 287.43 131.9 18.99 17.73	484.2 1.65 226.87 137.25 23.31 18.86	505.32 1.45 249.71 158.64 31.98 21.47	Current Assets Inventories Investments Trade Receivables Cash and Cash Equivalents Other financial assets Current Tax Assets Other current assets	360.8 0 349.88 0.68 47.86 8.35 82.18	372.78 0 291.55 13.65 49.52 4.45 61.02	376.35 0 280.01 10.10 55.21 5.65 66.35 0	527.97 0 376.43 22.3 60.58 0 71.80 7.76	513.36 6.86 352.82 27.97 56.08 7.01 102.44	506.04 8.12 416.81 20.69 41.74 8.85 112.24 0
Liabilities Current Liabilities Financial Liabilities (a) Borrowings (b) Lease Liabilities (c) Trade Payables (d) Other Financial Liabilities Provisions Other current liabilities Current Tax Liabilities	355.07 0 164.58 137.31 13.51 12.08 0	358.99 0 114.66 150.13 17.52 10.35 0	385.13 0 116.07 74.46 16.96 10.35 0	426.14 1.43 287.43 131.9 18.99 17.73 3.84	484.2 1.65 226.87 137.25 23.31 18.86 0	505.32 1.45 249.71 158.64 31.98 21.47 0	Current Assets Inventories Investments Trade Receivables Cash and Cash Equivalents Other financial assets Current Tax Assets Other current assets Assets Held for Sale	360.8 0 349.88 0.68 47.86 8.35 82.18	372.78 0 291.55 13.65 49.52 4.45 61.02 0	376.35 0 280.01 10.10 55.21 5.65 66.35 0	527.97 0 376.43 22.3 60.58 0 71.80 7.76 1,066.84	513.36 6.86 352.82 27.97 56.08 7.01 102.44 0	506.04 8.12 416.81 20.69 41.74 8.85 112.24 0

Secured PLI





administrative building cost.

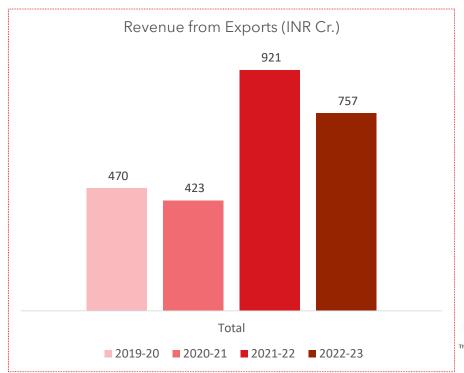


Recognised Four Star Export House



UDINSTAT00355382AM24

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

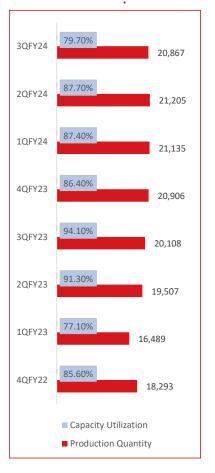




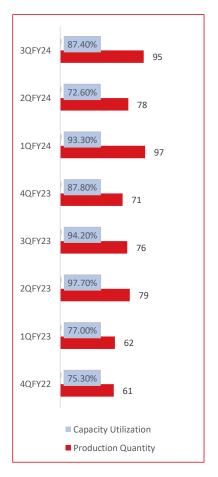
Production Quantity & Capacity Utilization %



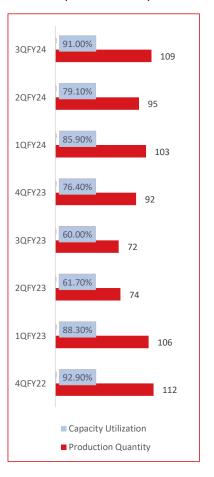




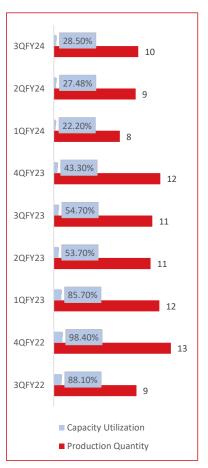
PV Fabric (Lakh Meter)



Denim Fabric (Lakh Meter)

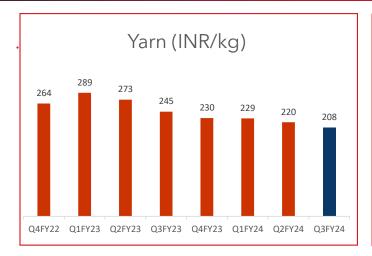


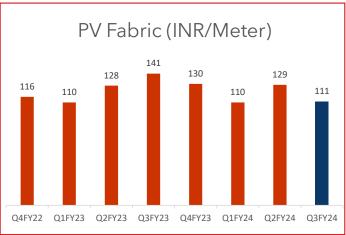
Garment (lakh pcs)

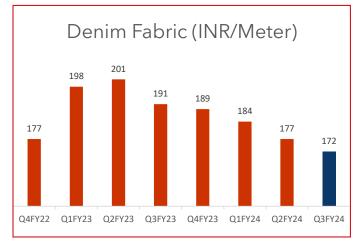


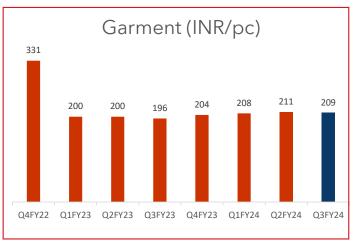
Product wise price realization











Our Customers































































Thank You



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