

CENTURY Textiles and Industries Limited

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CIN-L17120MH1897PLC000163

OUR REF. :

SH/XII/2021

05th June, 2021

Corporate Relationship Department
BSE Limited
1st Floor, Phiroze Jeebhoy Towers
Dalal Street, Fort,
Mumbai-400 001
Scrip Code: 500040

Listing Department
**National Stock Exchange of India
Limited**
"Exchange Plaza" 5th floor,
Bandra-Kurla Complex
Bandra (East), Mumbai-400 051.
Scrip Code: CENTURYTEX

Dear Sir/ Madam,

**Sub: Investor Presentation of Century Textiles and Industries
Limited ('the Company')**

**Ref: Regulation 30 of Securities and Exchange Board of India
(Listing Obligations & Disclosure Requirements) Regulations,
2015 ('Listing Regulations')**

Pursuant to Regulation 30 of Listing Regulations, please find attached herewith the Investor Presentation- June 2021 of the Company.

This is for the information of the investors and for your records.

Thanking you,

Yours truly

For **CENTURY TEXTILES AND INDUSTRIES LIMITED**



ATUL K. KEDIA
Company Secretary

Encl: as above





Century
Textiles
and Industries
Limited

Investor Presentation – June 2021

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Company Overview



Real Estate



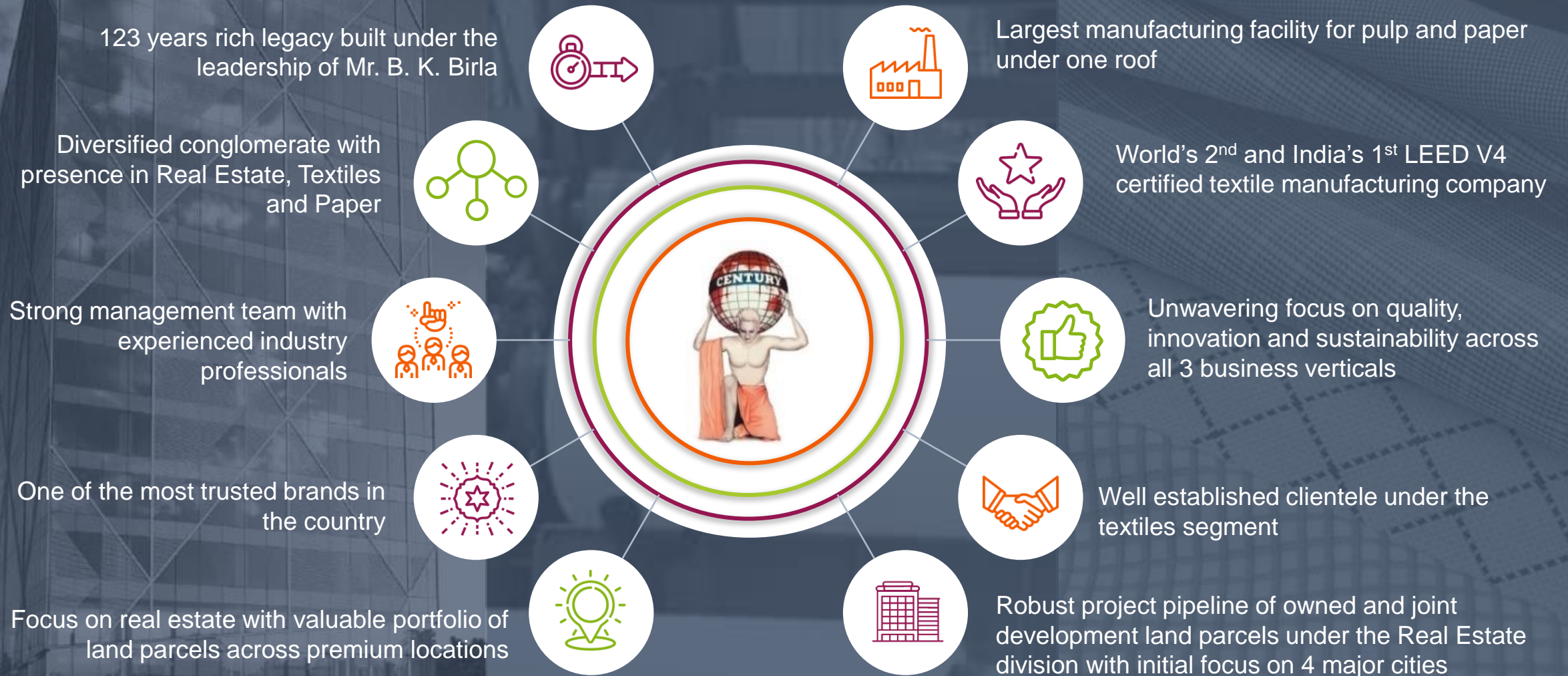
Pulp and Paper



Textiles



Financials



COMPANY OVERVIEW

- Incorporated in 1897, Century Textiles and Industries Limited (CTIL) has evolved from a single unit textile mill into a diversified conglomerate under the visionary leadership of Mr. B. K. Birla.
- The company's 123-years-old legacy is built on a steadfast commitment to the development of the nation with an unwavering focus on quality and innovation, combined with agility and customer centricity, Century is in a good stead to capitalise on market opportunities.

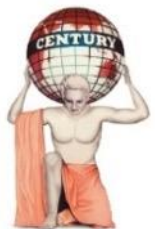
FY20 BUSINESS MIX (CONSOLIDATED)



Birla Estates – with an aim to deliver exceptional and premium home and office spaces, the company marked its entry into the realty sector in 2016.

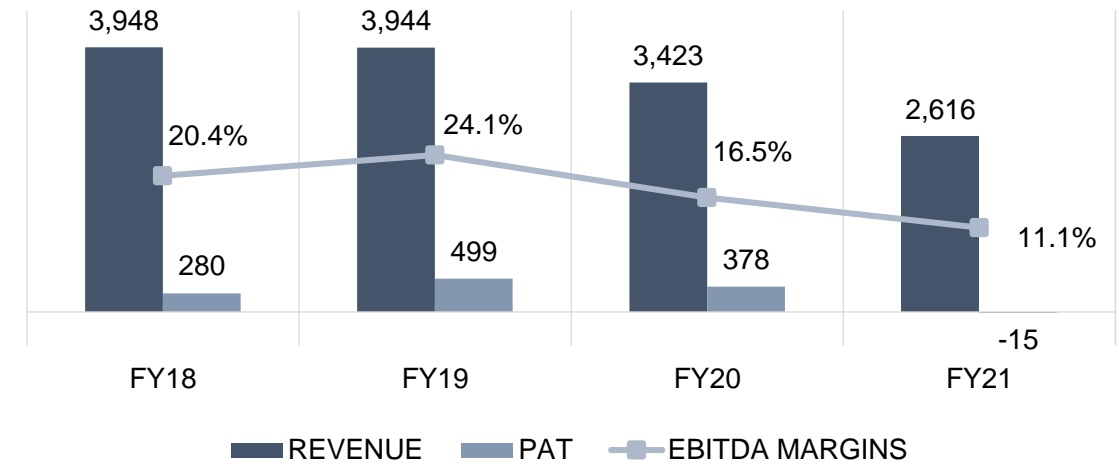


Century Paper & Pulp – is a producer of excellent quality writing and printing paper, and a leading manufacturer of tissue and board, as well as Rayon Grade Pulp products.

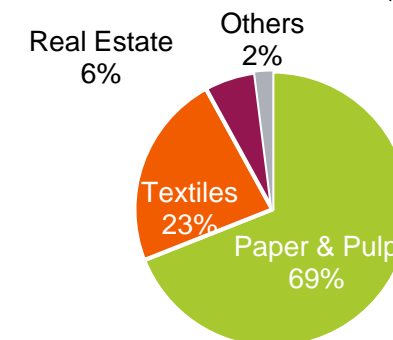


Birla Century - Produces a wide range of customised premium textiles which have applications in personal apparel and household linen.

REVENUE (RS. IN CRORES) EBITDA MARGIN (%)



REVENUE MIX – FY21 (RS. IN CRORES)



BOARD OF DIRECTORS



Mr. Kumar Mangalam Birla – Chairman – Mr. Kumar Mangalam Birla is one of the most renowned and respectable figures in Indian industry. He spearheads the iconic global conglomerate, Aditya Birla Group (ABG). His visionary leadership has, over the years, helped Century Textiles' to grow from strength to strength.. An educationist, Mr. Birla is the Chancellor of Birla Institute of Technology & Science (BITS). He is Chairman of IIT-Delhi, IIM-Ahmedabad and Chairman of Rhodes India Scholarship Committee for Oxford University. He serves on London Business School's Asia Pacific Advisory Board and is an Honorary Fellow of the London Business School. A qualified Chartered Accountant, Mr. Birla also holds a management degree from the London Business School.

Smt. Rajashree Birla - As Chairperson of the Aditya Birla Centre for Community Initiatives and Rural Development, Mrs. Rajashree Birla spearheads the social and community welfare activities across 40 companies in the Aditya Birla Group (ABG). The centre's initiatives in education, healthcare, sustainable livelihood and social reform work have benefitted more than 3000 villages and created a positive difference in the lives of seven million people. Her vision to elevate the under-privileged sections of society has inspired her to lead social causes including eradication of female infanticide, providing healthcare to the needy and providing homes to the homeless and destitute. Mrs. Birla is an iconic leader and a role model for those who aspire to bring about a positive transformation in society.



Mr. J. C. Laddha, Managing Director- Mr. Jagdish Chandra Laddha has a vast and rich business leadership experience of over 38 years. He has been associated with the Aditya Birla Group for over three decades, with his last assignment being at Hindalco Industries Ltd, where he led the copper business as its CEO. He has handled leadership positions across diverse industry sectors and also specialized functions in his illustrious career. Apart from the Aditya Birla Group, Mr. Laddha also had stints with Hindustan Lever Ltd, National Rayon Corporation Ltd. and Mangalore Refineries and petrochemicals Limited. Mr. Laddha has been the member of London Metal Exchange (LME) Copper Committee (representing India, South East Asia and Middle East), Director of Indian Copper Development Centre (ICDC), Director of Fertilizer Association of India (FAI), and Director of Dahej Harbour Infrastructure Limited (DHIL).Mr. Laddha has written extensively in many publications in India and has presented many papers on diverse subjects in National/International Conferences. Mr. Laddha is a fellow Chartered Accountant (FCA) by qualification.

Mr. R. K. Dalmia, Senior President, Century Textiles & Whole-time Director - A Chartered Accountant by qualification, Mr. Dalmia has been with the Group since the last four decades. He started his stint as Vice-President in The Technological Institute of Textiles and Sciences, Haryana and subsequently ascended to the position of President in 1983. In 1985, he was assigned the responsibility of improving the technical performance of Century Textiles' mill. Under his stewardship, the mill went on to win numerous accolades from the textile industry. Mr. Dalmia played a vital role in setting up two new divisions of the Company, i.e. Century Yarn and Century Denim in 1993 and 1997 respectively. He was also instrumental in the establishment of a new ultra-modern textile mill, near Bharuch in Gujarat in the year 2008 with 300 looms and over one lac spindles.



Mr. Sohanlal K. Jain
Independent Director

Ms. Preeti Vyas
Independent Director

Mr. Rajan A. Dalal
Independent Director

Mr. Yazdi. P. Dandiwala
Independent Director

KEY MANAGEMENT PERSONNEL



Mr. K. T. Jithendran – Chief Executive Officer (CEO), Birla Estates – Mr. K. T. Jithendran has over 26 years of work experience in the realty sector. One of his accomplishments includes taking a start-up company in the real estate sector to become one of the leading players in the category. Prior to joining Birla Estates, he was involved with Godrej Properties Limited (GPL) as an Executive Director. He has led most functions within the company while managing growth as well as building a strong talent team. A civil engineer from IIT Kharagpur, Mr. Jitendran also completed a Post Graduate Diploma in Management from IIM Kolkata and Advanced Management Program from Harvard Business School.

Mr. J. P. Narain – Chief Executive Officer (CEO), Century Pulp and Paper – Mr. Narain Jai Prakash has accumulated rich experience in his professional life, spanning 28 years, through his association with various FMCGs like Reckitt Benckiser India Limited, SAB Miller India Ltd, and Pepsico — at various levels. Throughout his professional life, he has an enviable track record of having introduced efficient manufacturing processes along with cost reduction in manufacturing operations. He is a Bachelor in Technology from Gujarat Agriculture University, Anand (Gujarat). Post his graduation, he enriched his management skills through a Diploma in Management (PGPEX) from Indian Institute of Management (IIM-C), Kolkata.



Mr. Arun Gaur – Chief Human Resources Officer – Mr. Arun Gaur is a thoroughbred and versatile HR professional with close to 36 years of extensive experience. Having started his career in 1981 with DCM limited in their textile division, he swiftly rose to the position of Industrial Relations Manager in 1987. During his tenure there, he played a vital role in setting up a textile unit in Hisar, Haryana. In 1991, he joined the textile division of Aditya Birla Group (ABG) at Gwalior. In 2007, he was deputed as the Chief People Officer in the Carbon Black business of ABG and was stationed in Atlanta, USA. After a short stint as the Chief Human Resources Officer (CHRO) in the Pulp and Fiber Business of ABG, in 2016, he joined Century Textiles and Industries Limited in the same capacity. After graduating from St. Stephens College in Science, Mr. Gaur completed his post-graduation in social work from the Delhi School of Social Work.

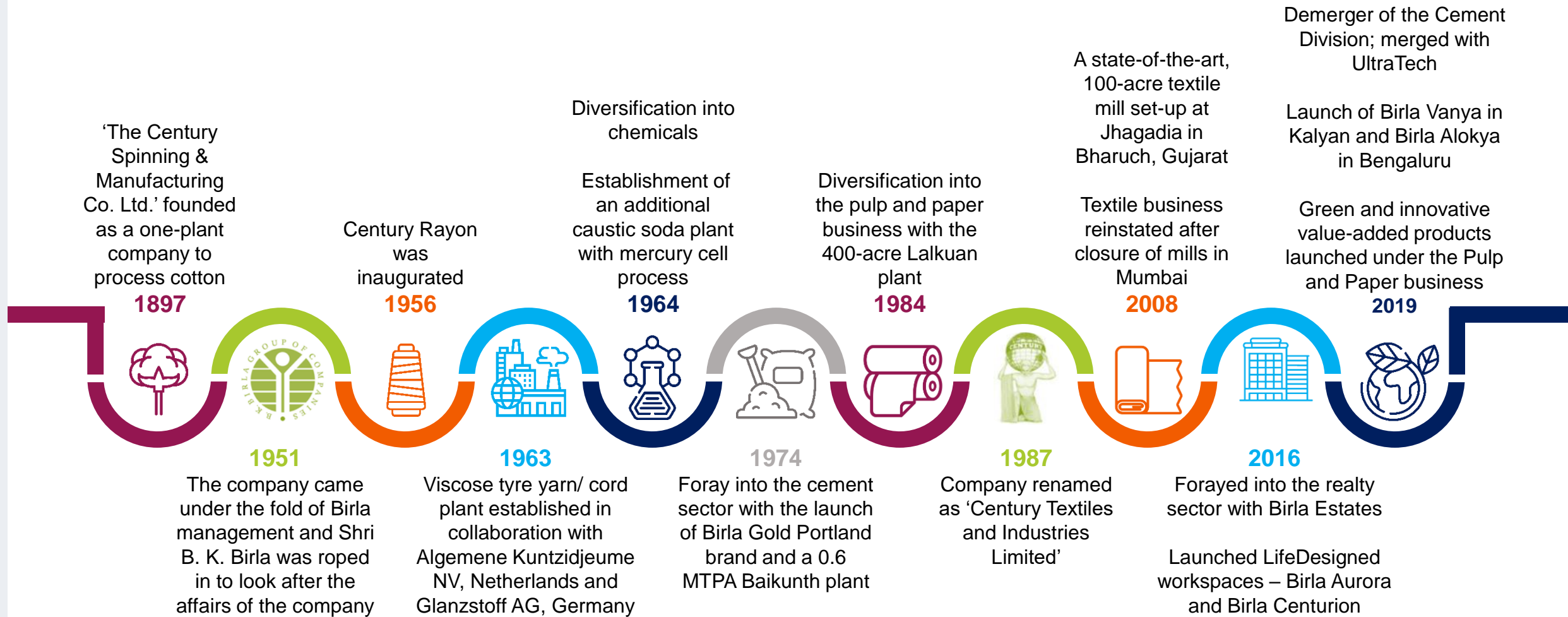
Mr. Snehal Shah – Chief Financial Officer (CFO) – Mr. Snehal Shah is a seasoned management professional specialising in business strategy with a cumulative experience of over 30 years in operations, business process, risk management MIS, administration, vendor management, and team building. His expertise spans across financial services, metals, cement, carbon black, textiles, chemicals and refineries. A Chartered Accountant by qualification, Mr. Shah headed the Corporate Management Services division at Aditya Birla Group for over four years; before donning the mantle of the CFO at Century Textiles and Industries Ltd. Mr. Shah was also part of Aditya Birla Capital for more than 12 years wherein he helmed the financial shared services operations, apart from the corporate operations of their life insurance wing. He also had a distinguished stint as a Senior General Manager in Birla Copper for over three years, managing the treasury desk for metals, forex and interest rate trading. In the early part of his career, he was closely involved with the Chairman's office at Aditya Birla Group in the capacity of Executive Assistant to the Chairman.



Mr. Atul K. Kedia – Vice President (Legal) and Company Secretary – Mr. Atul K. Kedia is Vice President (Legal), Company Secretary and Compliance Officer of the company. A Commerce and Law Graduate, he is a member of the Institute of Company Secretaries of India. He has been with the organisation for more than 30 years. He possesses vast experience in the field of investor relations apart from secretarial and legal matters.

7 OUR JOURNEY

Summary





Real Estate

Approx 36 lakh sq. ft. under construction across 3 projects



EXECUTIVE SUMMARY - REAL ESTATE

- The B. K. Birla Group forayed into the real estate sector in 2016 under the brand name 'Birla Estates'.
- The company is focused on developing land parcels owned by the Group, as well as growing the business with joint development agreements and strategic tie-ups across major cities in India.
- Furthering the Birla legacy of trust, excellence and leadership, the company aims to combine technology, innovation and sustainability to deliver premium real estate projects across commercial and residential segments.
- The vision is to transform the perception of the Indian real estate sector by delivering an exceptional experience and creating value; at every level, for every stakeholder.
- To start with, the company plans to focus on 4 cities – Mumbai, Bengaluru, NCR & Pune.

COMMERCIAL REAL ESTATE

- **BIRLA AURORA** - Birla Aurora is a 2.6 lakh square feet leasable property with distinctively refreshing architecture owing to an unconventional elliptical design. Birla Aurora houses some of the leading brands like General Atlantic, Siemens Ltd. and many more.
- **BIRLA CENTURION** - Birla Centurion is a 3.5 lakh square feet leasable property in a highly sought after business location with splendid architecture that inspires creativity. The sophisticated design incorporates minimalistic yet contemporary trends. Brands like Vodafone Idea, CoWrks, Hindalco Industries & Woori Bank have offices in this property.

REVENUE (RS. IN CRORES)



RESIDENTIAL REAL ESTATE

- **BIRLA VANYA** - Birla Estates launched its first residential project in FY 20 in Kalyan Maharashtra and within three days of the launch company had sold over 400 units and till date 95% of the total launched inventories.
- **BIRLA ALOKYA** – This duplex homes project in Bengaluru also saw a robust sales performance in FY21.
- **BIRLA NAVYA** - Birla Navya is a township project in the Golf Course extension road at Gurugram with premium floor residences. Company has achieved almost Rs. 500 Crs. of booking value within one year from the launch of the project.





STEP TOWARDS MORE FOCUS ON GROWING BUSINESS



Strengths



Opportunities



Strong Vision & Strategy

Leveraging:

- The Birla Brand
- Valuable portfolio of premium land parcels
- Dynamic team with extensive real estate experience
- Robust project pipeline of owned and joint development land parcels
- Strong sales and execution capability

Encash on:

- Rapid urbanization and nuclearization of families
- Rising per capita income in the long term
- Government thrust on Housing for All
- Rapid shift to becoming a professional and organised business
- Strong governance standards driven by RERA and GST implementation

Strong focus on:

- Maintaining a capital efficient, asset light model
- Delivering an exceptional experience and creating value for stakeholders
- Residential development, opportunistic approach to commercial
- Premium / mid-income residential segment
- Mumbai, NCR, Bengaluru & Pune Markets



BIRLA ESTATES

AWARDS & CERTIFICATIONS

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Real Estate



Green Project of the Year
National Infrastructure & Construction Awards



Green Building Project of the Year
Times Network Presents National Awards for Marketing Excellence - For excellence in real estate & infrastructure



Commercial Property of the Year
DNA Presents Real Estate & Infrastructure Round Table & Awards



Commercial Property of the Year
ET Now Presents Real Estate Awards



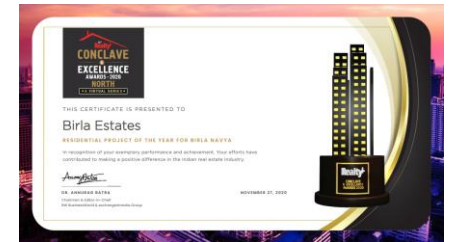
Green Building Project of the Year
ET Now Presents Real Estate Awards



Project Launch of the Year
The 11th Realty+ Excellence Awards 2019 West Zone



Iconic Project of the Year - Birla Alokya
Realty+ Conclave & Excellence Awards 2020 (South)



Residential Project of the Year - Birla Navya
Realty+ Conclave & Excellence Awards 2020 (North)

Pulp & Paper



Textiles



Financials



Innovative Marketing Campaign of the Year
DNA Presents Real Estate & Infrastructure Round Table & Awards



Iconic Marketing Campaign of the Year
Times Realty Icons Awards



ACE Alliance Award 2019 by SAP
For customer excellence and delivery in SAP Product Support



Iconic Emerging Developer, India
Mid-Day Real Estate & Infrastructure Icons



Best Real Estate Company
Global Real Estate Congress Real Estate Awards



Best Brand Marketing
Global Real Estate Congress Real Estate Awards



Emerging Developer of the Year (North) – Birla Estates
RE/MAX Presents Estate Awards



Luxury Project of the Year (North) – Birla Navya
RE/MAX Presents Estate Awards



BIRLA ESTATES

GEOGRAPHICAL PRESENCE

(C) - Commercial (R) Residential



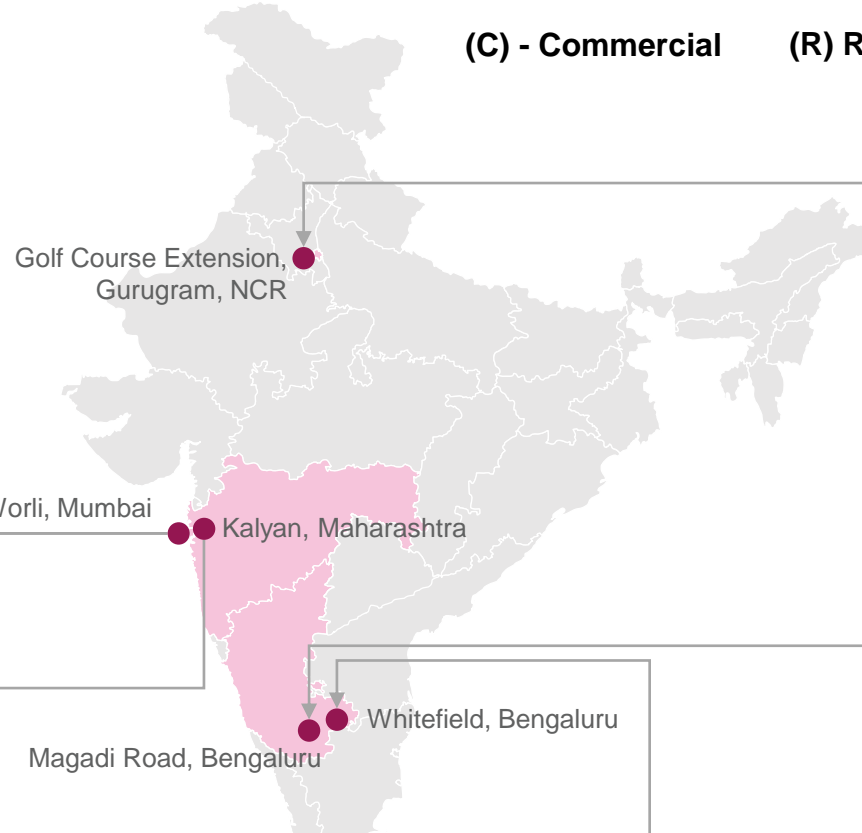
BIRLA CENTURION (C)



BIRLA AURORA (C)



CENTURY MILLS (R +C)



BIRLA NAVYA & GROUP HOUSING (R)



MAGADI ROAD (R)



BIRLA VANYA (R)



BIRLA ALOKYA (R)



SUMMARY OF PRODUCT PORTFOLIO

COMMERCIAL

Name of the Project	Location	Area (Lakh sq. ft)	No. of Storeys	Annual Leasing Revenues
Birla Aurora	Worli	2.6	22	Rs. 125 Cr
Birla Centurion		3.5	12	

RESIDENTIAL

Project Name	Location	Area (acres)	Saleable Area (lakh sq. ft)	Revenue Potential (Rs. In Cr)	Cumulative Booking Value (Rs. In Cr)	Project Type	Classification	Status
Birla Vanya	Kalyan, Maharashtra	22	Total 13.1 Phase I - 5.2	1,134	373	Residential – 1 BHK, 2 BHK, 3 BHK & 4 BHK	Own	Launched-Phase I
Birla Alokya	Whitefield, Bengaluru	8	5.5	393	215	Duplex homes with 3 BHK and 4 BHK spread across 2 floors	Own	Launched
Birla Navya (IF) + GH *	Golf Course Extention, Gurugram, NCR	65	Total 36.5 Phase I – 5.7	4,415	498	Residential – 2 BHK, 3 BHK & 4 BHK	JV	Launched-Phase I
Century Mills	Worli, Mumbai	30	Approx. Residential – 34 Commercial – 8	Res. – 10,000+ Comm. - lease	Yet to Launch	Product designing under progress	Own	Launch year-FY'22
Magadi Road	Magadi Road, Bengaluru	4.8	Approx 6	589	Yet to Launch	Product designing under progress	JV	Launch year-FY'22

* Currently Framework agreement is signed for group housing with revenue potential of Rs 2,150 Cr





RESIDENTIAL & COMMERCIAL SALES HIGHLIGHTS

Particulars	UOM	FY21	FY20	% chg YoY
Commercial				
Leasing Income	Rs. Cr.	125.7	134.6	(7)%
Average Rent Realisation (BA&BC)	Rs./sft	159.7	171.2	(7)%
Residential				
Booking Value	Rs. Cr.	621.0	464.2	34%
Collections	Rs. Cr.	154.2	84.0	83%





BIRLA VANYA, KALYAN – PROJECT UPDATE (LAUNCHED – Q1 FY20)



Location	Shahad, Kalyan
Area	22 acres
Saleable Area	13.12 lakh sq. ft. Phase 1 – 5.24 lakh sq. ft. launched
Revenue Potential	Rs. 1,134 Crs
Product Type	Residential – 1 BHK, 2 BHK, 3 BHK & 4 BHK
Cumulative Sales	Achieved Booking Value of Rs. 373 Crs
Construction	Construction of super structure in full swing



Location	Soukya Road, Bengaluru
Area	8.1 acres
Saleable Area	5.47 lakh sq. ft.
Revenue Potential	Rs. 393 Crs
Product Type	Residential – 3-Bed and 4-Bed Villaments
Cumulative Sales	Achieved Booking Value of Rs. 215 Crs
Construction	Construction of structure in full swing



BIRLA NAVYA, GURUGRAM (JV) – PROJECT UPDATE



Location	Sector 63 A, Gurugram, NCR
Area	65 acres
Saleable Area	36.5 lakh sq. ft. Phase 1 – 5.7 lakh sq. ft. launched
Revenue Potential	Rs. 4,415 Crs *
Product Type	Residential – 2 BHK, 3 BHK & 4 BHK
Launch Year	October 2020
Cumulative Sales	Achieved Booking Value of Rs. 498 Crs
Construction	Sample flat completed and opened for customers

* Includes Independent Floors and Group Housing

ENVIRONMENT, SOCIAL AND GOVERNANCE (ESG) – REAL ESTATE



ENVIRONMENT

- Adopted naturally ventilated apartments and Combustion Venting (Installation of CO sensors in Kitchen) in premium projects
- Measures for Water Conservation with a target of 50% water savings across all new projects: Existing projects have 45% water conservation measures
- Measures for Energy conservation with a target of 10% across all projects



SOCIAL

- We have a decent ratio of woman employees at 24%
- Have all policies which takes cares of women employees (maternity policy, POSH policy)
- CSR – We are spending sizable amount on account of CSR. Our focus is mental awareness among youth taking help of MPower foundation-
- MPower continuously organizing sensitivity training and programs for mental health and wellness of our employees and their families
- We have robust SOPs to take care of safety for all our employees in the prevailing pandemic situation.



GOVERNANCE

- Robust compliances of all regulatory requirements - RERA, Company's Act, RBI regulations, labour laws and MSME Act etc
- Company's Code of Conduct includes policies related to ethics, bribery and corruption.
- We also conduct periodic audits for safe working practices at the places of suppliers / vendors
- We are member of all reputed Trade and Chamber of Associations etc - MCHI- CREDAI (Mumbai Unit & Kalyan Dombivali Unit) & NAREDCO West Foundation



Pulp & Paper

Flag bearer in Paper Industry

PULP & PAPER - EXECUTIVE SUMMARY



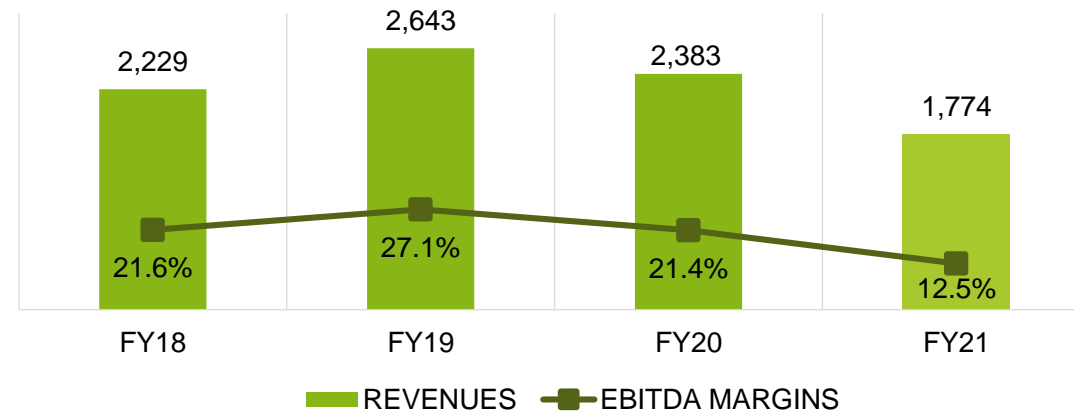
- Century Pulp and Paper (CPP) is a producer of excellent quality writing and printing paper, and a leading manufacturer of tissue and board, as well as Rayon Grade Pulp (RGP) products.
- Established in 1984, with relentless focus on quality, the company manufactures international-grade products and is now a leading player in India's pulp and paper industry.



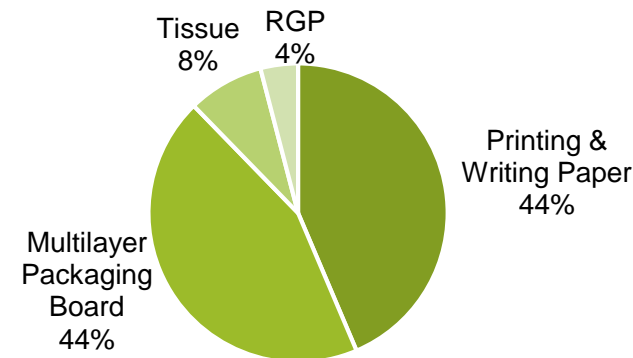
PRODUCT PORTFOLIO

- **WRITING & PRINTING PAPER** - Century Pulp & Paper range of writing and printing paper is used to produce a wide range of stationery such as notebooks and envelopes. The current capacity for Paper stands at 550 ton per day
- **MULTI LAYER PACKAGING BOARD** - With a capacity of 500 ton per day, the company manufactures packaging boards with applications in e-commerce, food, FMCG and pharma industries
- **TISSUE** - Set up in 2009 & 2021, Century is the largest and most advanced manufacturer of Jumbo Soft Tissue Paper Rolls in India. Further product diversification include Facial Tissue, Towel Grade Tissue, Napkin Tissue and Toilet Tissue with a total capacity of 200 ton per day.
- **RAYON GRADE PULP** - Rayon Grade Pulp is a highly purified form of cellulose made from wood and used in a wide variety of consumer applications including Viscose Staple Fiber, Viscose Filament Yarn and cellophane papers. The total capacity stands around 100 tons per day.

TURNOVER (RS. IN CRORES) & EBITDA MARGINS (%)



REVENUES MIX – FY21 (CONSOLIDATED)



STEP TOWARDS MORE FOCUS ON GROWING BUSINESS



Leveraging:

- India's only integrated Pulp & Paper mill providing comprehensive solution from single location
- The Birla Brand
- Recent expanded capacity in the tissue paper segment
- In-house power generation of up to 96% of the total requirement

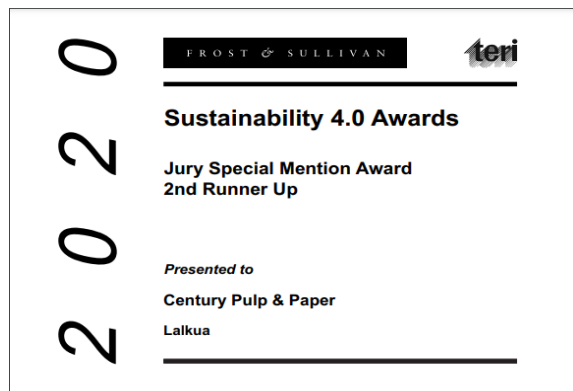
Encash on:

- Growth in tissue paper demand due to awareness towards hygiene & sanitation
- India's per capita paper consumption being one of the lowest compared to other developing economies like China & Indonesia
- Higher spends by Government on education and rising literacy levels
- Increased demand for packaging board for e-commerce, FMCG, Pharma & FMCD

Strong focus on:

- Cash Conservation and asset light model
- Increasing dealer network and improving working capital management
- Innovation & increasing exposure to specialty products like tissue and packaging Board
- Sustainable wood procurement

AWARDS & CERTIFICATIONS (2020-21)



Century Pulp and Paper is the holder of following certifications:

- Sustainability 4.0 Challengers Award : Lalkuan Plant has been awarded “Sustainability 4.0 Challengers Award-2020” in a joint assessment conducted by Frost & Sullivan and Teri, covering various business aspects under 4 major pillars i.e. People, Partnership, Purpose and Planet.
- Sustainability 4.0 Power Plant Optimization Award : Lalkuan Plant has been awarded “Sustainability 4.0 Jury Special Award-2020” (2nd runner-up) towards various Energy Conservation efforts made by the plant. This evaluation has been made in a joint assessment conducted by Frost & Sullivan and Teri, covering various energy conservation parameters like – boiler & TG combined cycle efficiency improvements, coal & power saving initiatives and plant’s contribution towards Environment etc.
- Agro-Industrial Exhibition Award : In the 109th “All India Farmer’ Fair and Agro-Industrial Exhibition – 2021”, organised by and held at G B Pant University of Agriculture & Technology, Pantnagar, Uttarakhand, the Division has received First prize.



ISO 9001



ISO 14001



OHSAS 18001



FSC C104223

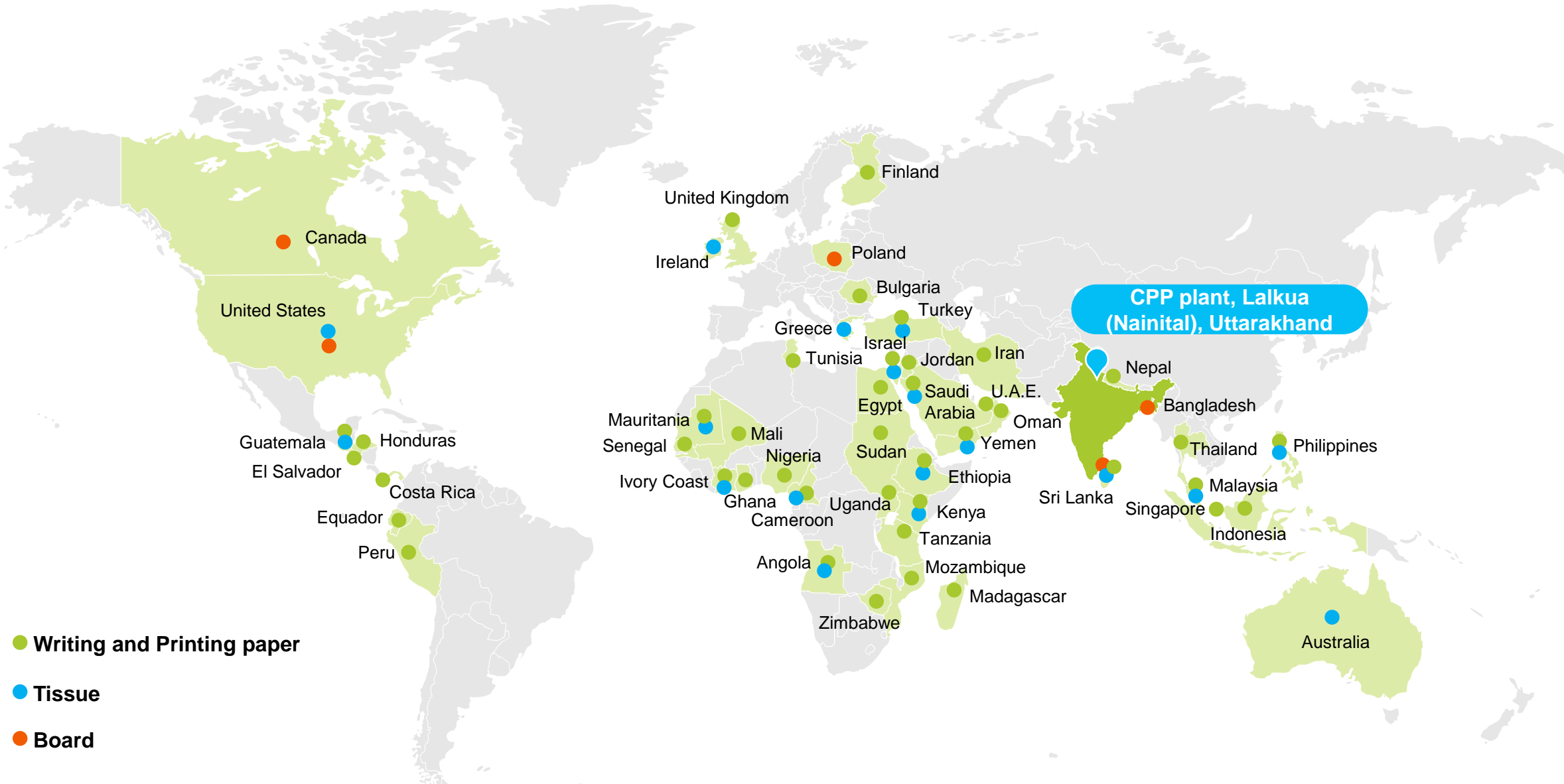
GEOGRAPHICAL PRESENCE

Real Estate

Pulp & Paper

Textiles

Financials



- Writing and Printing paper
- Tissue
- Board

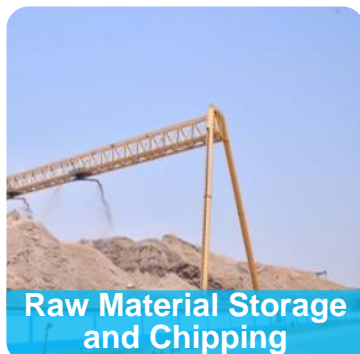
CENTURY PULP & PAPER MILL – MANUFACTURING CAPACITIES

- Established in **1984**, the manufacturing facility is **India's only integrated Pulp and Paper mill** that delivers **comprehensive solutions in finest varieties** of Writing & Printing Paper, Virgin fiber grade fine tissue, Multilayer Packaging Board and Rayon Grade Pulp.
- Situated at the foothills of the Himalayas in Lalkua (Nainital), Century Pulp and Paper is a committed employer of the local community.

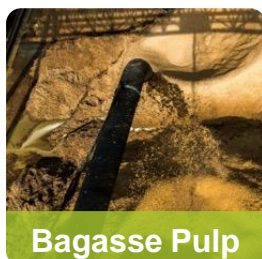


Fiber Line Pulp Mill

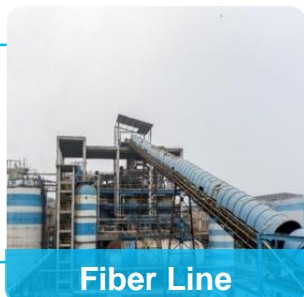
RGP Pulp Mill



Raw Material Storage and Chipping



Bagasse Pulp

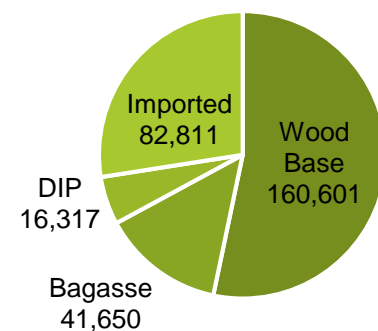


Fiber Line



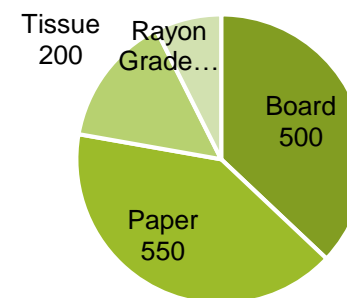
DIP

RAW MATERIAL FLEXIBILITY (VOLUME IN MT)- FY21



Total – 3,01,379 MT

PRODUCTION CAPACITY BREAK-UP (TONS/PER DAY)



Total – 4,81,130 MT

4.81 Lakh MTPA

Total Capacity

87 MW
(Self Generation Turbine)

Power

> 6,500
(Approx)

Manpower

Rs. 2,475 Cr
(Approx. opening FY21)

Fixed Assets

PRINTING & WRITING PAPER



- Century Pulp & Paper range of writing and printing paper is used to produce a wide range of stationery such as notebooks and envelopes.
- Printing paper is specially designed for printing books, note books, publishing and printing due to its uniform, fast ink-trapping and drying qualities, as well as its dimensional stability.
- The products manufactures include Cream Wove, Maplitho and Specialty Paper



INDUSTRIAL PAPER & PACKAGING BOARD

INDUSTRIAL PAPER

- Century manufactures different type of paper used in Industrial use: wide range of packaging, cardboard, tissue, insulation and wrapping products.

PACKAGING BOARD

- The company is a provider in primary and secondary packaging - offering ready to use material required by the pharmaceutical, food and FMCG sectors amongst others

TISSUE PAPER & RAYON GRADE PULP



TISSUE PAPER

- Set up in 2009 & 2021, Century is the largest and most advanced manufacturer of Jumbo Soft Tissue Paper Rolls in India.
- The Products include Facial Tissue, Towel Grade Tissue, Napkin Tissue and Toilet Tissue

RAYON GRADE PULP

- A dissolving grade pulp, Rayon Grade Pulp is a highly purified form of cellulose made from wood and used in a wide variety of consumer applications.
- Uses of the pulp include Viscose Staple Fiber, Viscose Filament Yarn (for textiles and non woven products for household, hygiene, medical and industrial absorbent products) and cellophane papers. Rayon grade pulp (RGP) is prepared and supplied to filament yarn manufacturers.

KEY INITIATIVES ENVISAGED

Real Estate

Pulp & Paper

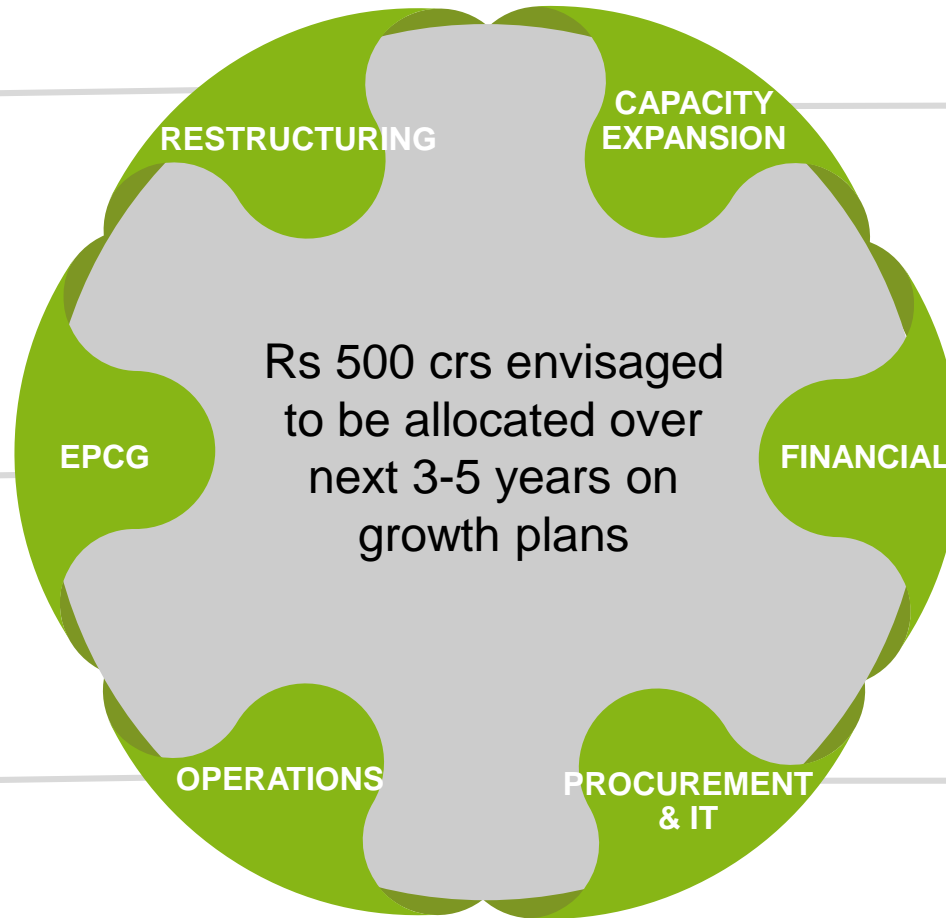
Textiles

Financials

Lean Senior Leadership Team
 Workmen Optimization
 Apprentice appointment
 Induct MT in sales and train them for direct sales rather than thru dealer

Increased Exports
 Plan to fulfill licenses by 2022

Sweating of existing assets
 Efficiency Drive
 Effective utilization of Power/Steam
 Debottlenecking of key ingredient - White Liquor (wherever possible)
 Asset Care Process Implementation – condition monitoring, MTBF/MTTR
 Continuous Cost Reduction Processes



Evaporator
 PM 3 & 4 Upgradation
 Fibreline & Rec Boiler
 BCTMP Plant
 New Recovery Boiler/Turbine
 43MW Turbine
 Energy Savings Projects

Extended credit days
 Working Capital Optimization
 Effective Management of debtors

Sustainable Wood Procurement
 Cost Effective Pulp combination
 Effective Coal Procurement
 JIT Procurement
 VMI – Vendor Managed Inventory

FUTURE AHEAD

B2C Channel ➔

Increase Dealer Network ➔

Innovation ➔

Asset Light Model (Outsourcing) ➔

Working Capital Management ➔

Reduce Logistic Cost ➔



Energy Management

Century Pulp & Paper takes every effort to reduce its carbon footprint and impact to the environment. This is achieved by constantly making improvements to its operations in the following key areas :

- Power Consumption
- Waste Management
- Usage of Raw Materials and Conservation.

Power Consumption

The plant consumes approximately 14.0 lacs units per day, of which an estimated 95% of power is generated internally. Out of this, 40% of CPP's power needs are met through the process of biomass waste in the form of black liquor, pith and sawdust.



Other Initiatives for conservation of energy include:

A) Conservation of Energy:

- (a) Steps taken on conservation of energy:
 - i) Blow Heat Recovery utilized to generate heat from digester,
 - ii) For steam saving, installed efficient secondary air heater,
 - iii) Installed burner at lime kiln for higher utilization of PG gas, in place of FO,
 - iv) Installed Centralized Refining System to feed pulp at multiple plant's need,
 - v) Improved turbine vacuum,
 - vi) Optimised PGP's consistency to save refining energy,
 - vii) Steam valve optimization to minimize MP steams peaks in various pulp mills.
- (b) Steps taken for utilizing alternative sources of energy:
 - i) Continued usage of Black Liquor & Pith (Bio mass product) for steam generation
 - ii) Continue usage of CMG at Tissue plant in place of LPG,
 - iii) Increased usage of Producer Gas in place of furnace oil in lime kiln
 - iv) Utilization of solar Energy.

B) Technology Absorption:

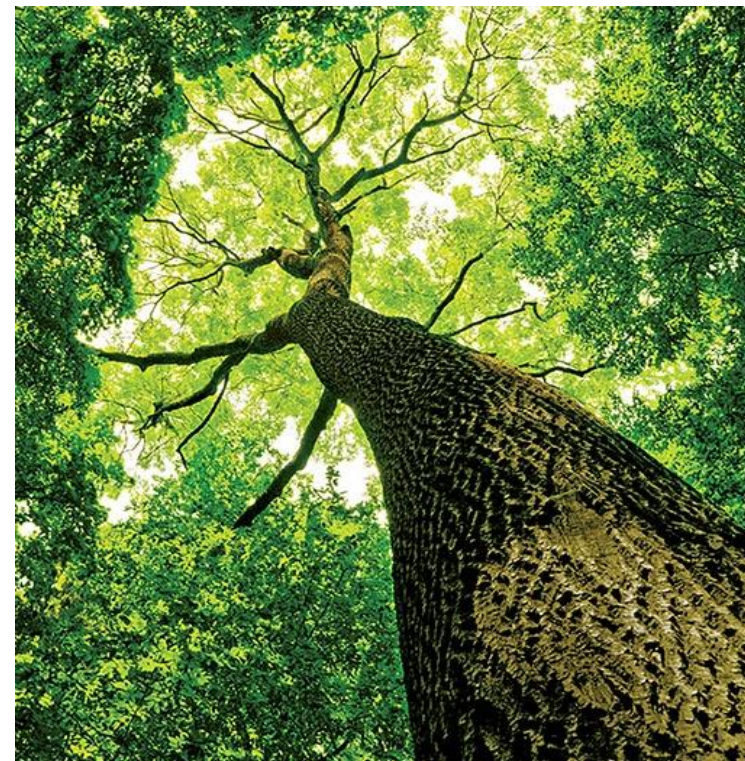
- (a) Efforts made towards technology absorption:
 - i) Upgradation of COL system at PM#3
 - ii) WPP Calendar upgradation
 - iii) Industry 4.0 at PM#4
- (b) Benefits derived as a result of above efforts.
 - i) Reduction in Power consumption
 - ii) Quality Improvement.
 - iii) Reduction in Steam consumption

CONSERVATION ACTS

Century Pulp & Paper runs a number of forest and water conservation initiatives in line with its corporate philosophy.

Forest conservation

- Bagasse and recycled waste paper used as a raw material eventually helps in conservation of forests
- ECF pulping at the new fibrelines (pulp mill) is chlorine-free
- Installation of screw presses for effluent solids to be reused
- Steam prehydrolysis process at fibrelines acts as an energy saver, helping in water conservation and reduction in effluent load
- Reuse of machine back water in the pulp mill after clarification and filtration process
- Reuse of RGP bleaching back water for washing of bagasse
- PH liquor is mixed with weak black liquor, concentrated in the evaporator, and finally fired in the recovery boiler to curb pollution and generation of steam.



RAW MATERIALS

- Century Pulp & Paper follows local legislations closely as it is committed in the conservation of the environment and the protection of its stakeholders' interests. As a result, we adhere to major raw material requirements set by the Agro-forestry sector.
- Century Pulp & Paper uses a variety of raw materials and pulpable raw material species such as eucalyptus, poplar, vineer waste, bamboo, bagasse and recycled waste paper to manufacture its products.
- As a technologically advanced company, Century Pulp & Paper generates its own plantation activities by preparing high-yielding eucalyptus clones on one of the best soils in India. This increases the size of the catchment areas and fulfils our own raw material requirements.
- Century Pulp & Paper has its own chemical recovery process where we treat black liquor into white liquor and recycled to pulping process. This is done as black liquor is harmful to the environment when left as an effluent. The company also adopts wood-free paper manufacturing, where a chemical pulping process is used to create our products. Made from pulpwood, chemical pulp is not considered wood as most of the lignin is removed and separated from the cellulose fibres during processing. This is unlike mechanical pulp where it retains most of its wood components. In addition, wood-free paper is not as prone to yellowing as papers made of mechanical pulp.
- Due to its numerous capabilities, Century Pulp & Paper is known to house one of the most complex manufacturing setups under one roof.



ENVIRONMENT

- Deployed FEM – Facility environmental module & FSLM social labour module to benchmark the sustainable drive in the management of Raw material, Energy, Water, Air emission & Chemical.
- Reduced carbon footprint by -
 - Planting 7,20,000 trees in FY21
 - Wood utilized for production made available by social forestry program
 - 2.4 MWp solar power plant installed
 - Using Biomass i.e. black liquor & bagasse pith for renewable energy.
- Better water management using 4R principle i.e reduce, reuse, reprocess & recycle. Approximately 25% water after tertiary treatment is reused while remaining is discharged outside within the prescribed norms.



SOCIAL

- Contributed during pandemic by ordering of 3 nos. Medical Oxygen plants of 9 M³/ hr capacity and provision of beds, Oxygen Cylinders, PPEs and pulse oximeters provided for hospitals. 180000 Ltrs. Sanitizer and 60000 masks (Prepared by ladies of our skill development center) distributed to surrounding areas.
- CSR – We are spending sizable amount on account of CSR. Our main focus on healthcare, Sanitation, Education & Infrastructure Development.
- MPower continuously organizing sensitivity training and programs for mental health and wellness of our employees and their families.
- We have robust SOPs to take care of safety for all our employees in the pandemic situation.



GOVERNANCE

- Robust compliances of regulatory requirements - Factory Act 1948, EPF Act, Contract Labor Act, Employees Compensation Act, Industrial Boiler Act, Electricity Act, EP Act & Petroleum Act etc.

STRATEGIC PERFORMANCE (2015-2021)

Real Estate

Pulp & Paper



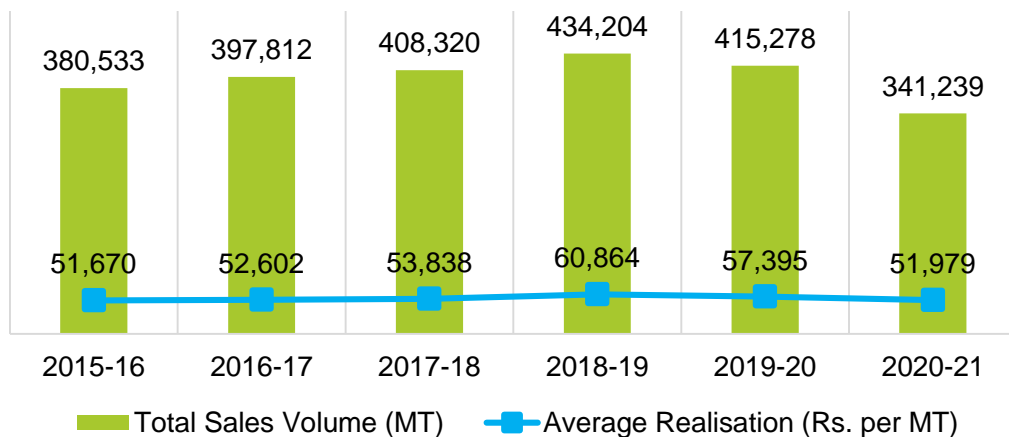
Textiles



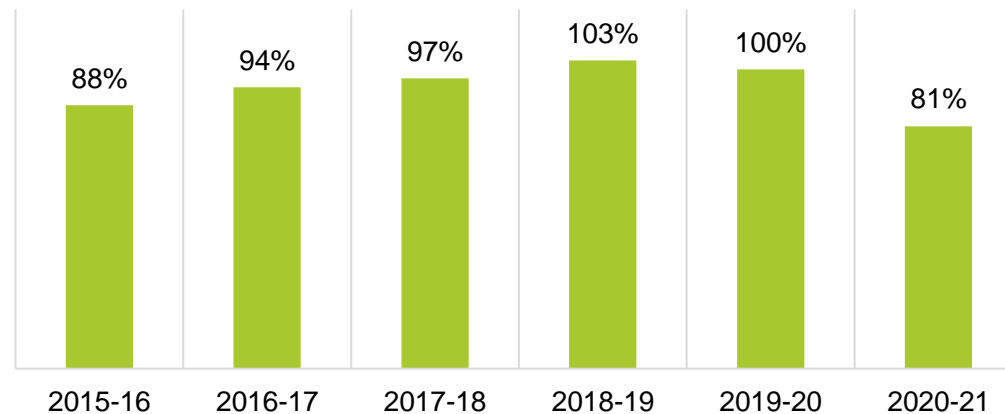
Financials



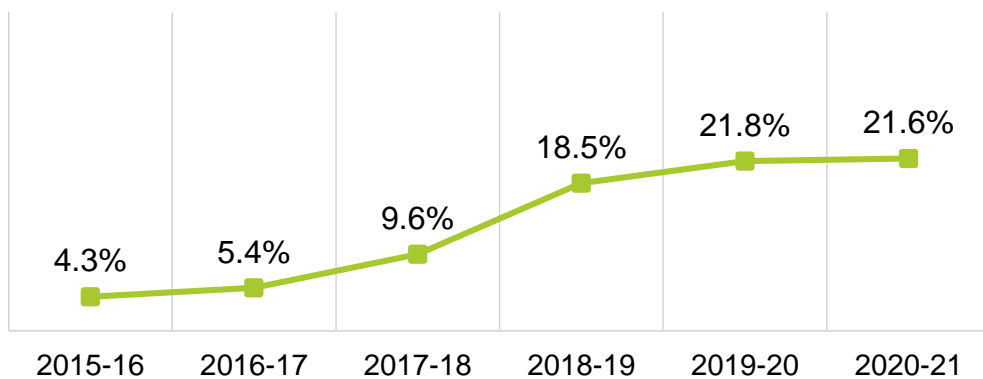
HISTORICAL SALES VOLUMES AND REALISATIONS



CAPACITY UTILIZATION PERCENTAGE

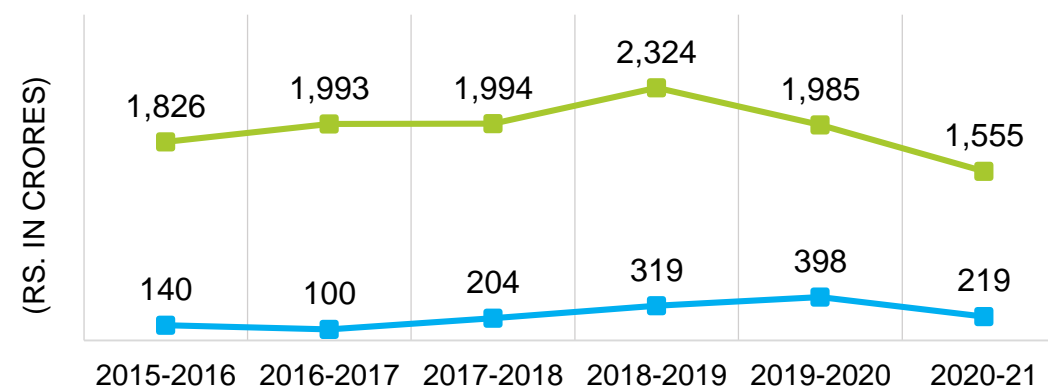


REVENUE CONTRIBUTION FROM VALUE ADDED PRODUCTS (%)



SALES TURNOVER

DOMESTIC EXPORTS





Textiles

World's 2nd and India's 1st LEED V4 certified textile mfg co.



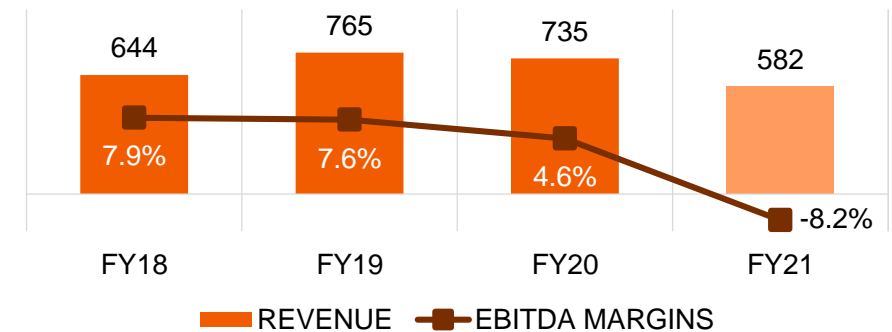
EXECUTIVE SUMMARY – CENTURY TEXTILES

- Century Textiles and Industries Limited (CTIL), was incorporated in Mumbai, India, in 1897. A state-of-the-art, vertically integrated plant, Birla Century (A Division of CTIL) was set up at Jhagadia, Bharuch, Gujarat, in the year 2008, using the best modern machinery to produce a wide range of premium textiles.
- The company's USP is the customisation it offers clients in terms of the weave, design and texture of products. It has an extensive network of distributors and dealers in India and we also sell our exclusive range of home-textiles and other products in the global market.
- The focus is on manufacturing products of excellent and consistent quality; adding value by offering a variety of weaves, designs, and finishes; innovating continuously to create new products; and satisfying our customers with our excellent service and timely delivery.

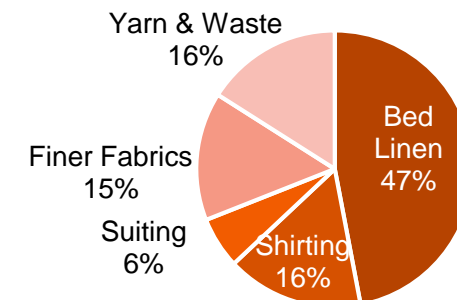
PRODUCT PORTFOLIO

- **SHIRTINGS** - Manufactures premium range elite shirting in elegant designs, weaves and colours in the range of Ne 40 to Ne 150 in singles and Ne 2/80 to Ne 2/200 in 2 plys.
- **BOTTOM WEIGHT** - As one of the leading bottom-weight fabric manufacturers in India, the company manufactures luxury bottom weights in the range of Ne 10 to Ne 4/100 and is available in whites, solids, prints, and yarn dyed with special weaves and designs.
- **FINER FABRICS** - The Birla Century range of Finer Fabrics i.e. dress materials are available in a variety of contemporary designs, weaves and colours. Poplin, cambric, lawn, twill, satin, mull, voile, dobby and slub dress materials are manufactured at the technologically-advanced factory in the range from Ne 40 to Ne 150 in singles and doubles.
- **BED LINEN** - Premium quality household linen from Birla Century includes a wide range of elegantly tailored sheets, and bed and bath coordinate pieces. Suited perfectly for domestic as well as international markets, the 100% cotton products are available in varied styles and designs in the range of 180 TC to 2000 TC.

TURNOVER (RS. IN CRORES) & EBITDA MARGINS (%)



REVENUE MIX – FY21 (CONSOLIDATED)





STEP TOWARDS MORE FOCUS ON GROWING BUSINESS



- State-of-the-Art Vertically Integrated Plant (Fibre to Finishing)
- Birla Century Brand
- Fine spinning up to count 200 ne
- Legacy of Textile for more than 100 years
- STEP Certification – 1st fabric manufacturing company in India to receive this for sustainability

- US-China trade war has increased demand of Indian products in USA
- RCEP (Regional Comprehensive Economic Partnership) non signing at present helps India's domestic market
- Go-green & zero discharge at Bharuch unit, justifies parameters of global brand
- Opened LLC at USA to cater big brands, regional retailers, hospitality industries, etc.

- Increased penetration of organised retail, better demographics and rising income levels
- Abundant availability of raw material - cotton
- Growing exports demand and direct catering to big brands in USA



BIRLA CENTURY - JOURNEY OF BUSINESS SUSTAINABILITY



Oeko-Tex Standard 100



NABL Accreditation for our Testing Laboratory of Birla Century



STeP– Certification



MIG Tags



SA 8000- 2014



LEED (Leadership in Energy and Environmental Design)



BCI Registered Member (Better cotton Initiative)



Global Organic textile Standards (GOTS)

Apart from above, Birla Century has similar certifications from world renowned international accreditation institutes, certifying either Go-Green, product safety, safer environment, social performance expectation, healthy working conditions, sustainability etc. Other sustainability initiatives include Fair Trade, HIGG Index Level 3, ZDHC participation, Joint Life Program approved unit from Inditex (Zara). Birla Century is the approved supplier of international brands like Macy's, West point Home, William Sonoma, COSTCO, Standard Fibre etc. for Bed linens.



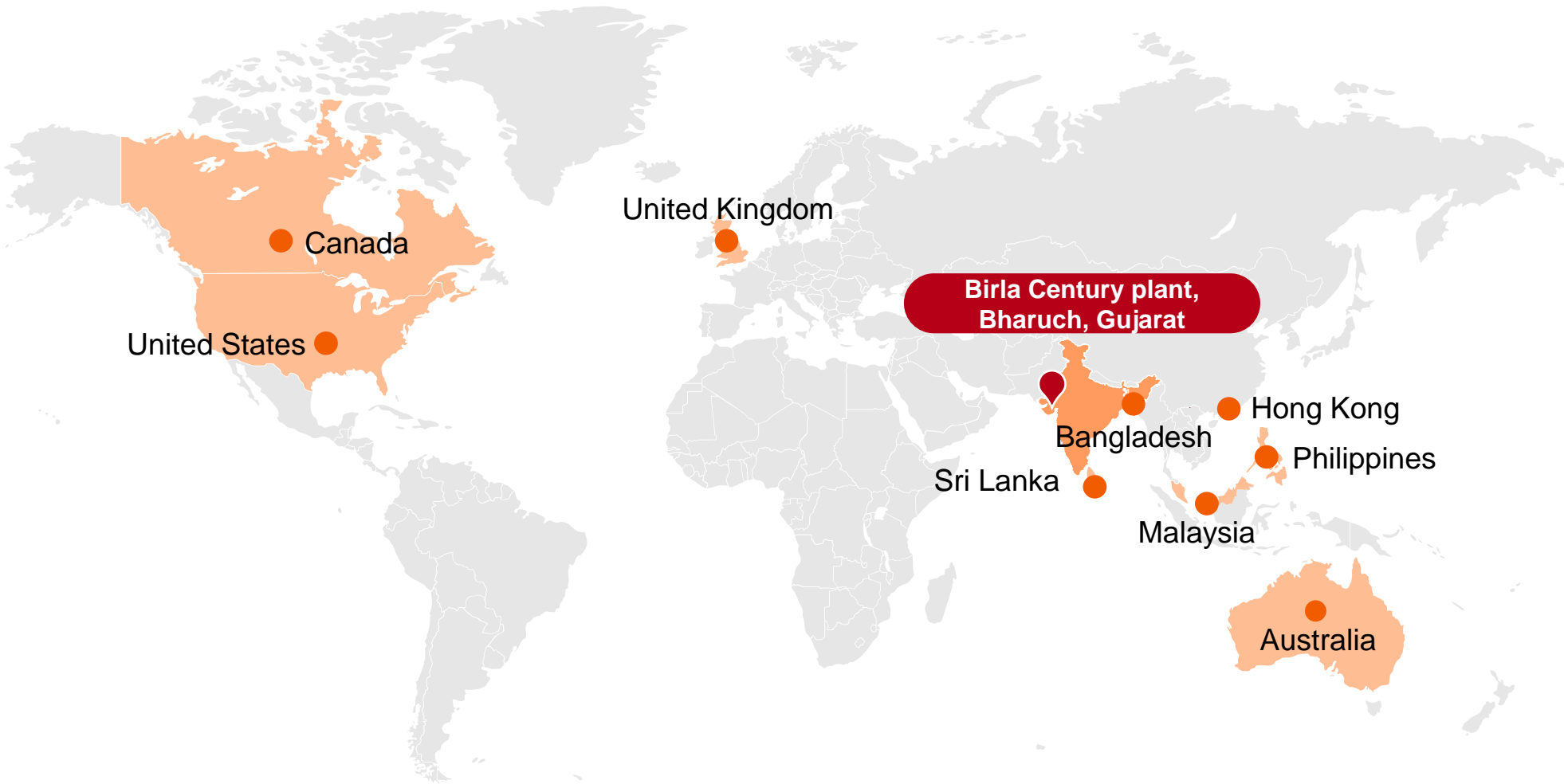
GEOGRAPHICAL PRESENCE

Real Estate

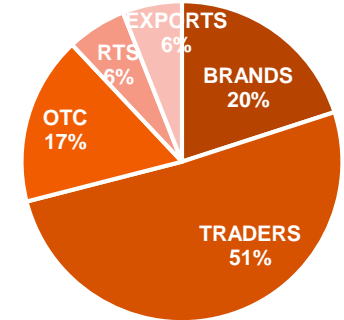
Pulp & Paper

Textiles

Financials

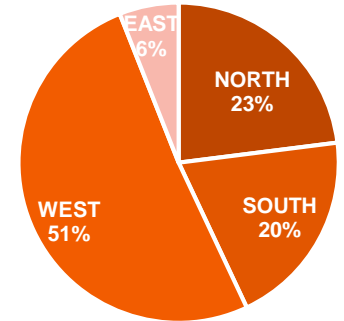


SEGMENT-WISE

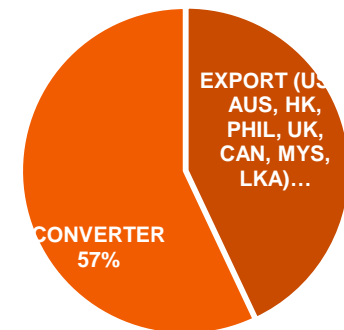


APPARELS

ZONE WISE



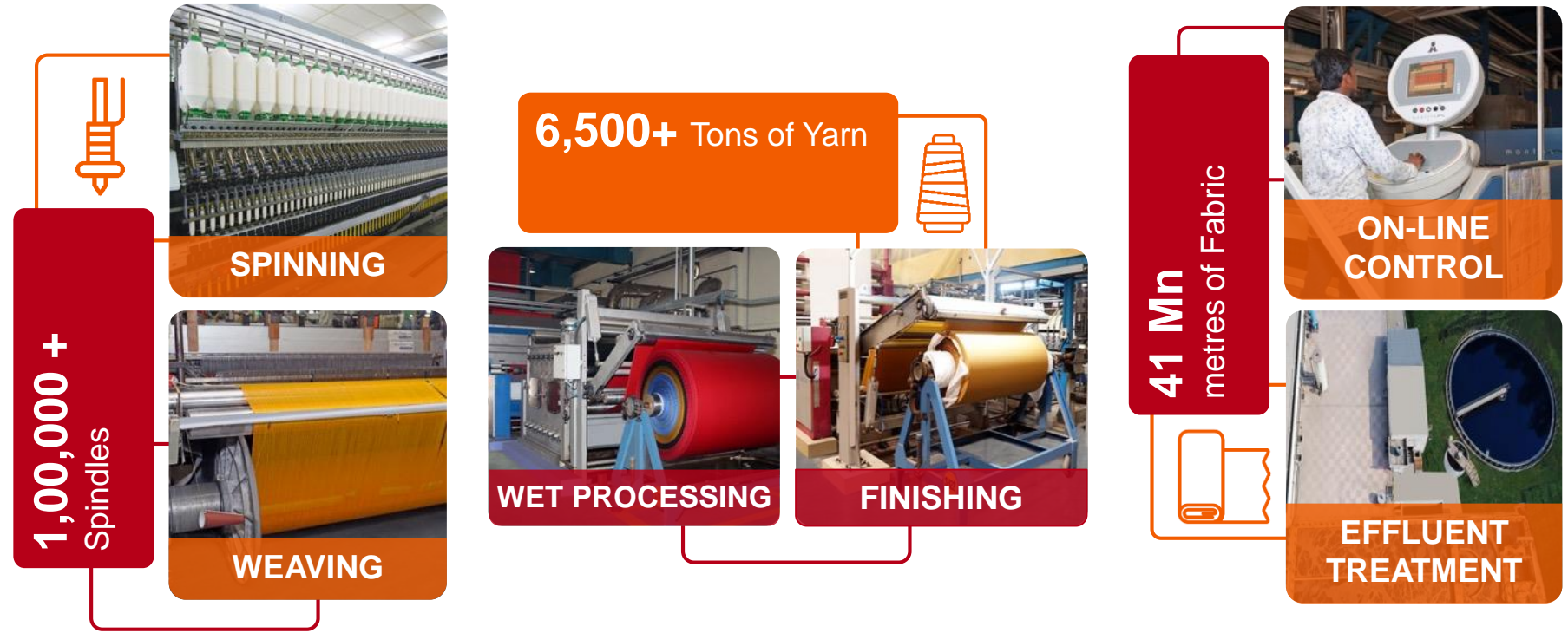
HOME TEXTILES





INTEGRATED MANUFACTURING FACILITY & PROCESS

- Century Textiles & Industries Limited invested about US\$180 million (Rs. 850 Crore) in setting up, a Greenfield project in Jhagadia, Bharuch, Gujarat known as "BIRLA CENTURY" to manufacture textile products.
- Spread over an area of 42.56 mn Sq. Ft (100 acres) of land, it's strategic location provides it logistical advantage in terms of easy connectivity and accessibility via rail, air and road links.
- Our manufacturing technology compares with the best across the globe, offering speed, versatility and quality. Most of the technology procured for the plant is from the best manufacturers of equipment in their respective fields.



INNOVATION THROUGH RESEARCH & DEVELOPMENT

The company has an established design studio at our corporate office in Mumbai and at the plant in Bharuch, Gujarat, equipped with an active library of designs for weaves. Designers continue to add new designs to this portfolio every day and this ongoing design development and the extensive design database enables us to be a trendsetter in the market.

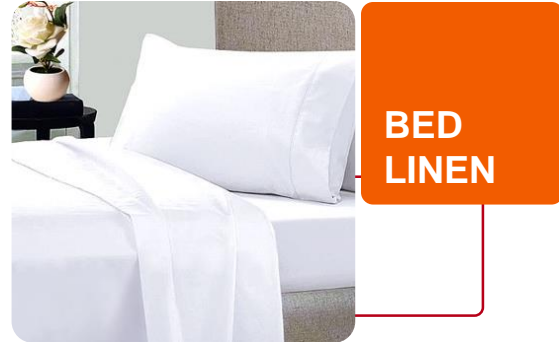




PRODUCT PORTFOLIO



- The company manufactures premium range elite shirting in elegant designs, weaves and colours.
- Birla Century's shirting with 100% Indian and Egyptian cotton with various blends etc. comes in innovative finishes like Bio-polish, Wrinkle free and Crease resistance



- Birla Century is one of the leading bed and bath linen manufacturers in India.
- Birla Century's bed linen products come in innovative finishes like MXL, easy iron, easy care, anti-wrinkle, aroma, water repellent, anti-bacterial etc.
- The products are manufactured with yarn made of 100 per cent cotton i.e. Indian, Suvin, Giza, Pima, Organic etc and blends of linen, Modal, Excel, bamboo, etc.

MARQUEE CLIENTS

- Macy's
- Costco
- CHF
- Hometex
- Royal Linen



- The Birla Century range of Finer Fabrics i.e. dress materials are available in a variety of contemporary designs, weaves and colours.
- Poplin, cambric, lawn, twill, satin, mull, voile, dobby and slub dress materials are manufactured at the technologically - advanced factory.
- In addition to products with cotton, fibres like modal, excel, viscose etc. are manufactured along with a range of traditional sarees and dhotis.

MARQUEE CLIENTS

- US Polo
- Arrow
- Louis Philippe
- Van Heusen
- Allen Solley



- Birla Century offers luxury suiting fabrics (bottom-weight fabrics) in myriad shades and textures to suit every taste.
- As one of the leading bottom-weight fabric manufacturers in India, our suiting is characterised by high dimensional stability, or, in other words, the ability to retain its size and form. It is wrinkle-free, crease recoverable, amazingly smooth, and exudes a brilliant lustre.



ENVIRONMENT

- Deployed two modules : FEM – Facility environmental module and FSLM – Facility social labour module to benchmark for the sustainable drive in the management of Environment, Energy, Water, Air emission, Waste & Chemical
- Reduced energy needs by 17% in the past 4 years and recycled 95% of water used
- 5-year roadmap - plan to adopt renewable energy to replace fossil fuel thereby reducing carbon footprint. Also, plan to reduce waste from ETP substantially (80% lesser load of landfill)



SOCIAL

- Keeping our objective of women empowerment, approx. 8-10% of our manpower are women
- CSR – We are spending sizable amount on account of CSR. Our focus is mental awareness among youth taking help of MPower foundation.
- MPower continuously organizing sensitivity training and programs for mental health and wellness of our employees and their families
- We have robust SOPs to take care of safety for all our employees in the prevailing pandemic situation.
- Plantation of more than 3000 trees in and around the Plant
- Installed ESP (Electrostatic presipitator) on Thermopac chimney to avoid air pollution to nearby villages



GOVERNANCE

- Robust compliances of regulatory requirements - EPF act, Factory Act 1948, Contract labour act, employee's compensation act, Industrial Boiler act, Electrical act, Air pollution and hazardous waste act, Gujarat energy development act (GEDA), etc.
- Achieved the target of PAT cycle (Performance, achieve & trade) under Bureau of Energy Efficiency.



BIRLA CENTURY, STRATEGIC PERFORMANCE

Real Estate



Pulp & Paper



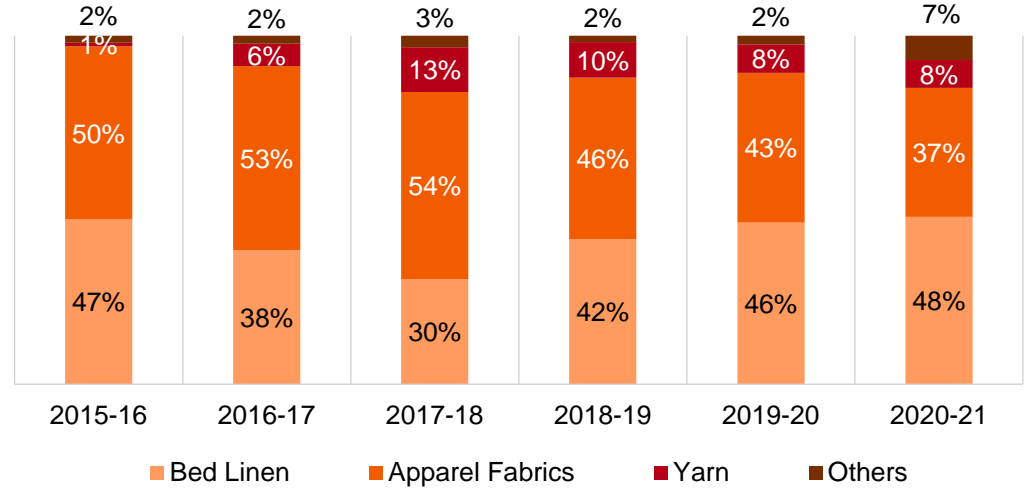
Textiles



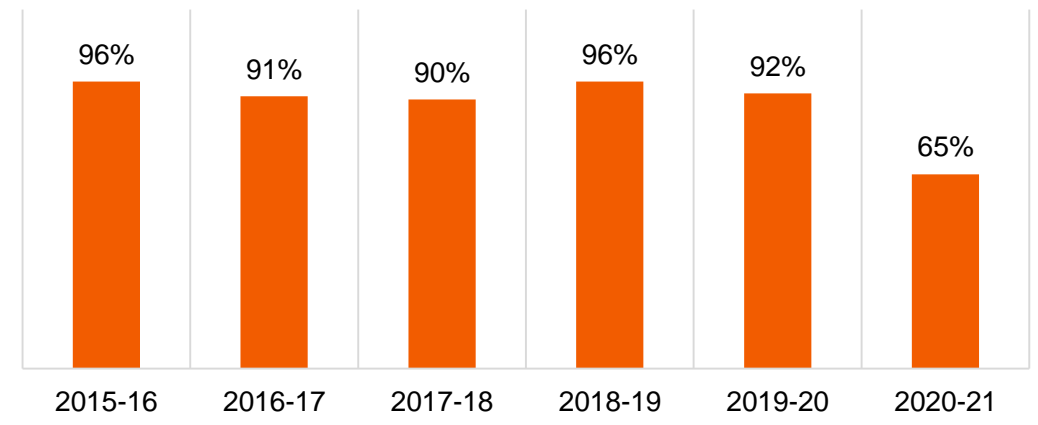
Financials



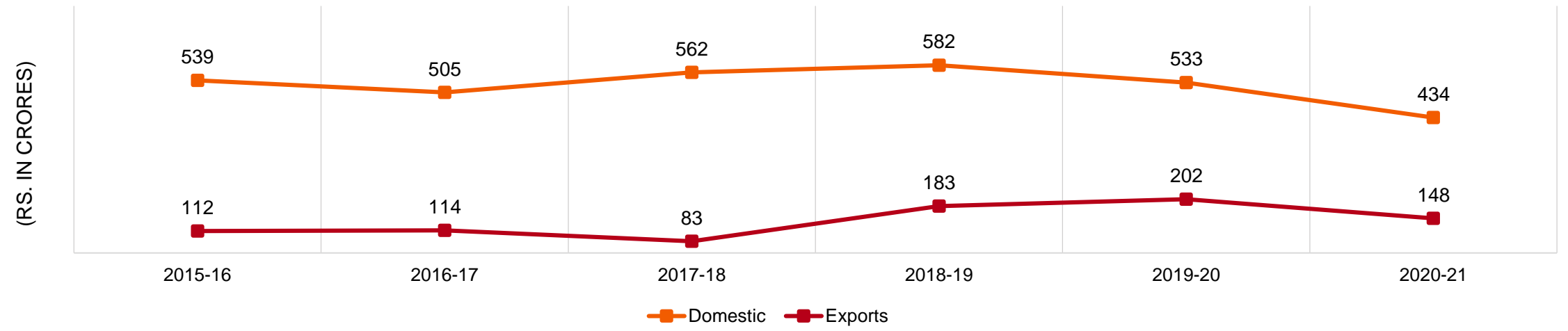
BUSINESS MIX



CAPACITY UTILIZATION PERCENTAGE



SALES TURNOVER





Financial Summary

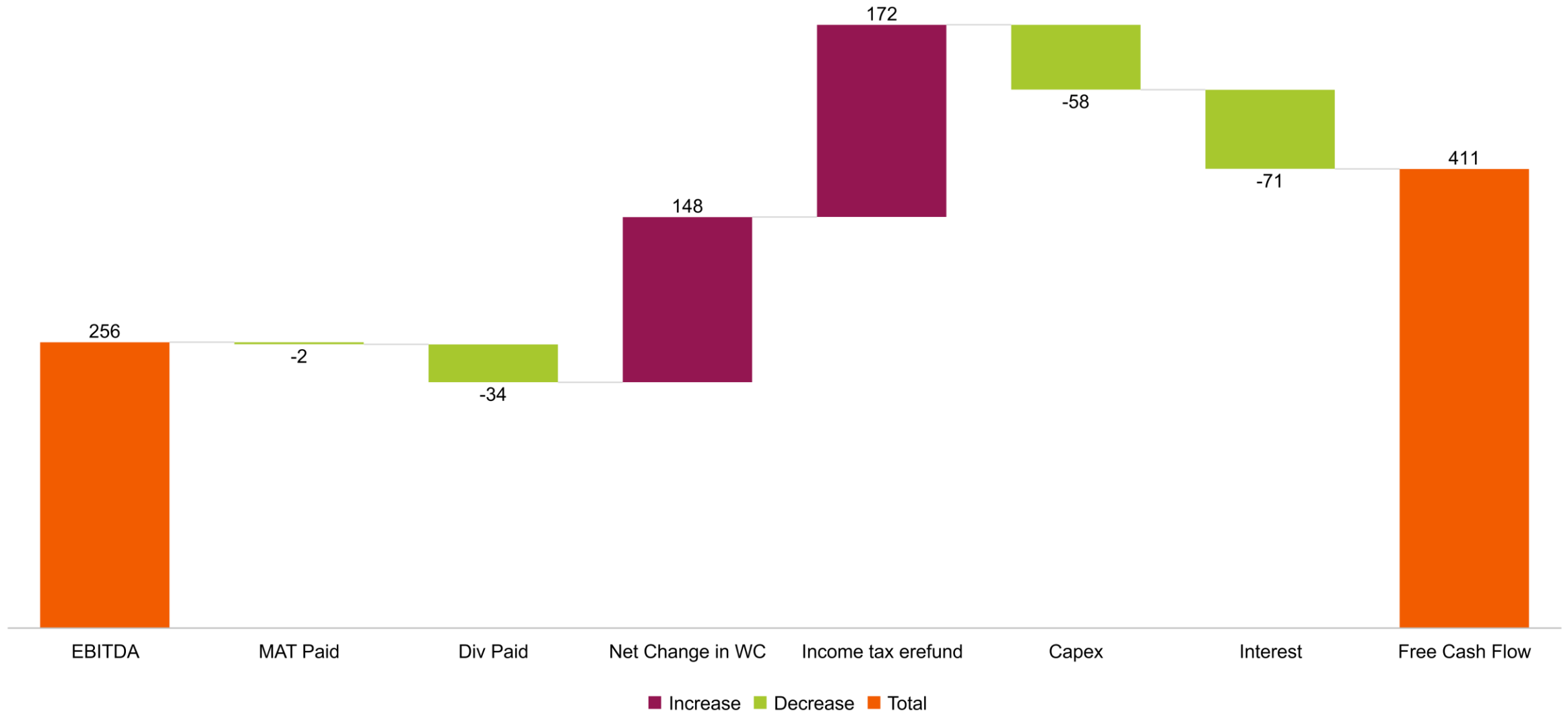
PROFIT & LOSS – FY21

(RS. IN CRORES)

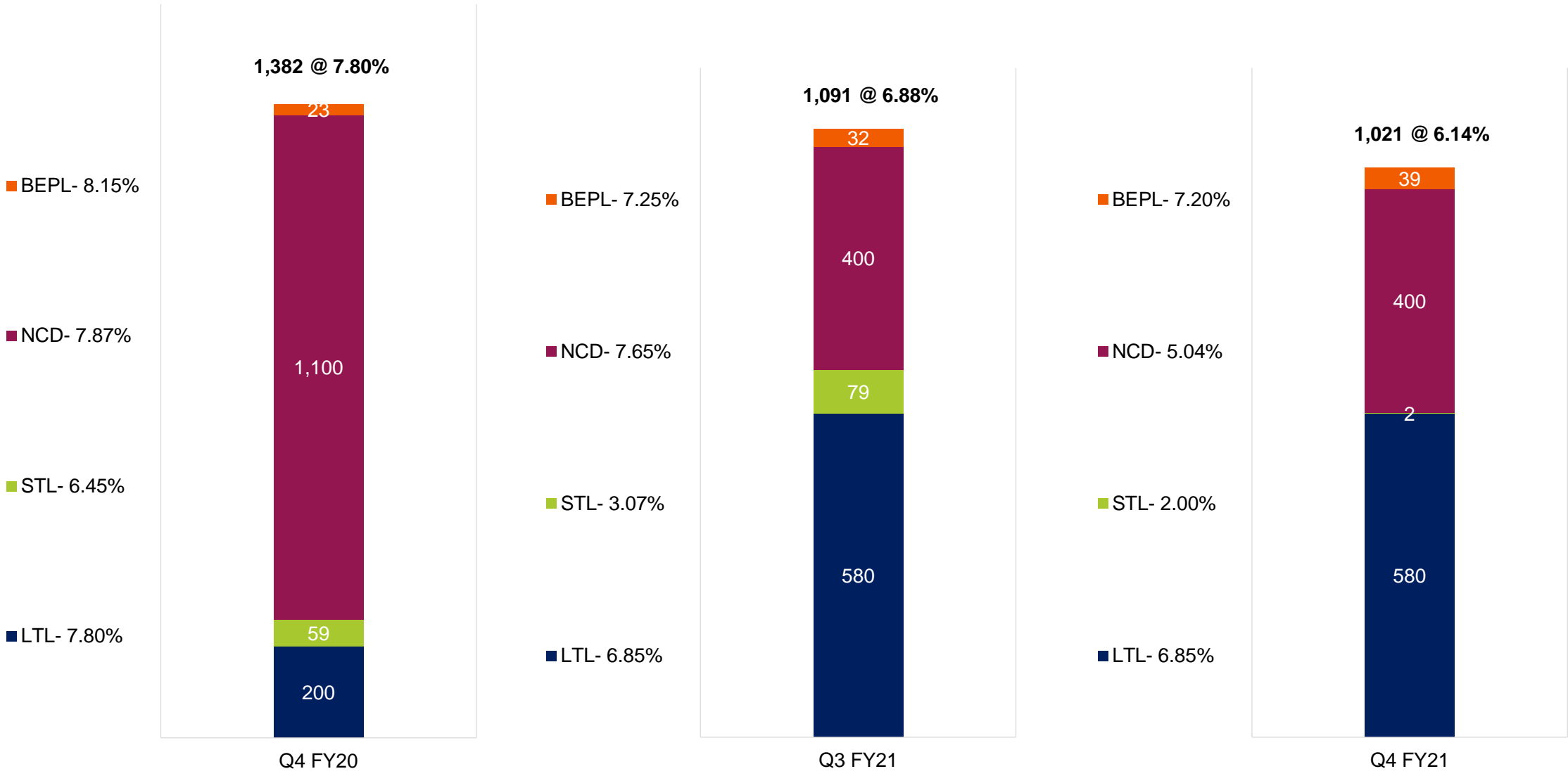
Particulars	FY20	FY21	Variance Y on Y	
			Amount	%
Continuing Operations				
Sales				
Textiles	735	582	-153	-21%
Pulp & Paper	2,383	1,774	-609	-26%
Real Estate	146	142	-4	-3%
Others	67	69	2	3%
Total Sales	3,331	2,567	-764	-23%
EBITDA				
Textiles	34	-48	NA	NA
Pulp & Paper	511	221	-290	-57%
Real Estate	4	31	27	675%
Others	51	48	-3	-6%
Interest income of income tax refund		33	NA	NA
Total EBITDA	600	285	-315	-53%
Less : Finance Cost	87	71	-16	-18%
PBDT	513	214	-299	-58%
Less : Depreciation	229	230	-1	0%
PBT	284	-16	NA	NA
Tax	-94	-1	NA	NA
Net Profit after Tax	378	-15	NA	NA
Discontinuing Operations				
Profit after Tax	-17	-19	NA	NA
Total Net Profit after Tax	361	-34	NA	NA

CASH FLOW – FY21

(RS. IN CRORES)



OUTSTANDING LOAN



FINANCIAL PERFORMANCE

Real Estate



Pulp & Paper



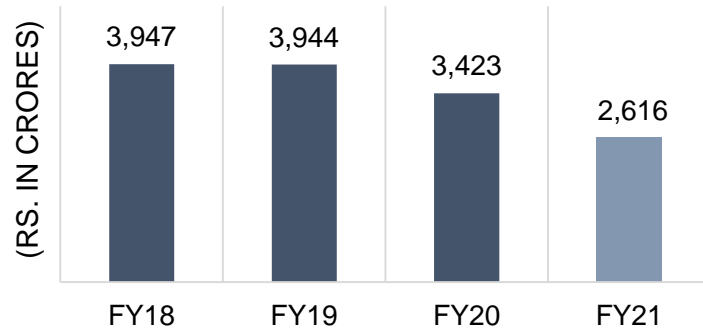
Textiles



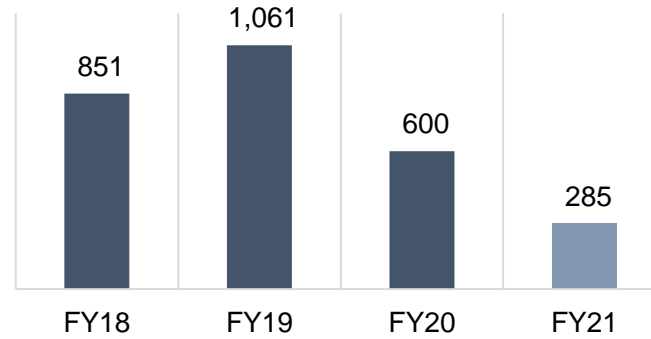
Financials



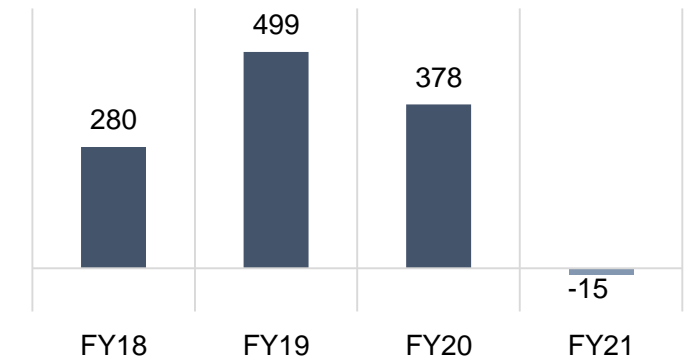
REVENUES (RS. IN CRORES)



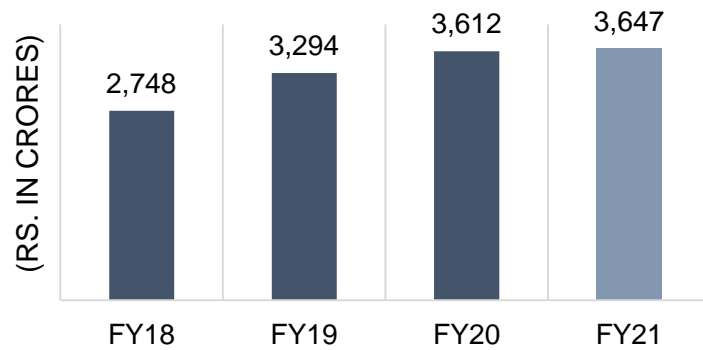
EBITDA (RS. IN CRORES)



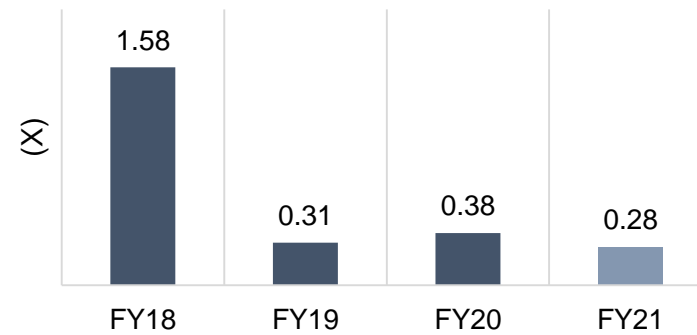
PAT (RS. IN CRORES)



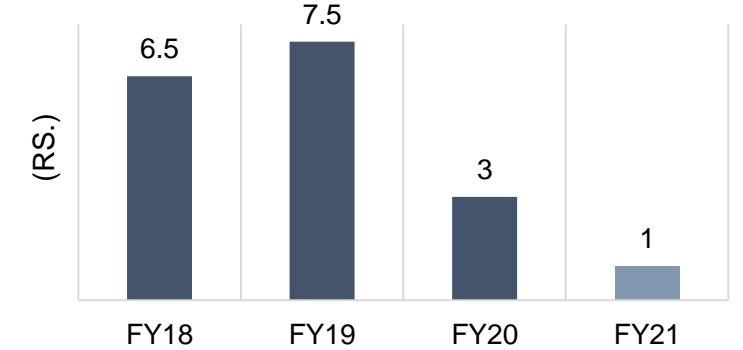
NET WORTH (RS. IN CRORES)



NET DEBT TO EQUITY (X)



DIVIDEND PER SHARE (RS.)



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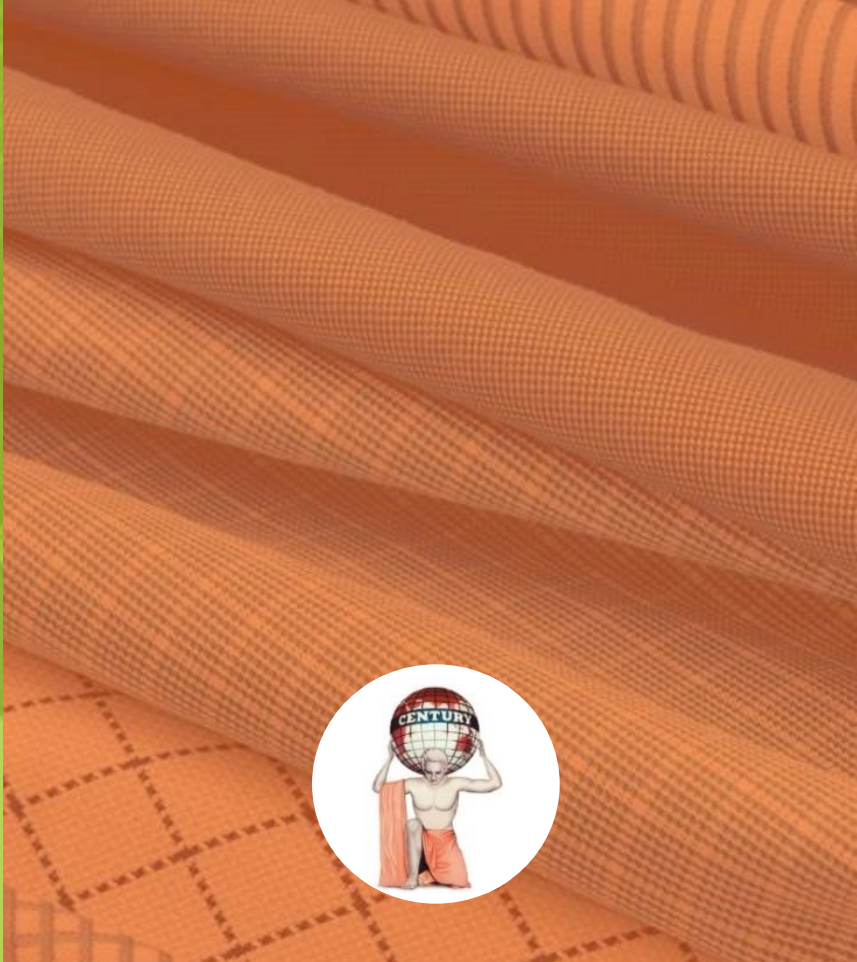
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Email: century@valoremadvisors.com



Bringing our century old legacy and expertise into all our businesses while focusing on sustainability, customer centricity, technology and innovation to be future ready

Thank You