



SH/XII/2023

12th May, 2023

Corporate Relationship Department
BSE Limited
1st Floor, Phiroze Jeejeebhoy 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’)**

Please refer to our earlier letter dated 11th May, 2023, regarding the physical meeting of the representatives of the Company to be held on Monday, 15th May, 2023 and Tuesday, 16th May, 2023 with several funds as mentioned in the said letter.

In connection to the above, please find attached herewith an Investor Presentation for a non-deal road show to UK to meet investors as referred to above.

This is for your information and record.

Thanking you,

Yours truly
For **CENTURY TEXTILES AND INDUSTRIES LIMITED**

ATUL K. KEDIA
Sr. Vice President (Legal) & Company Secretary

Encl: as above





Century
Textiles
and Industries
Limited

Investor Presentation – May 2023

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Company Overview



Real Estate



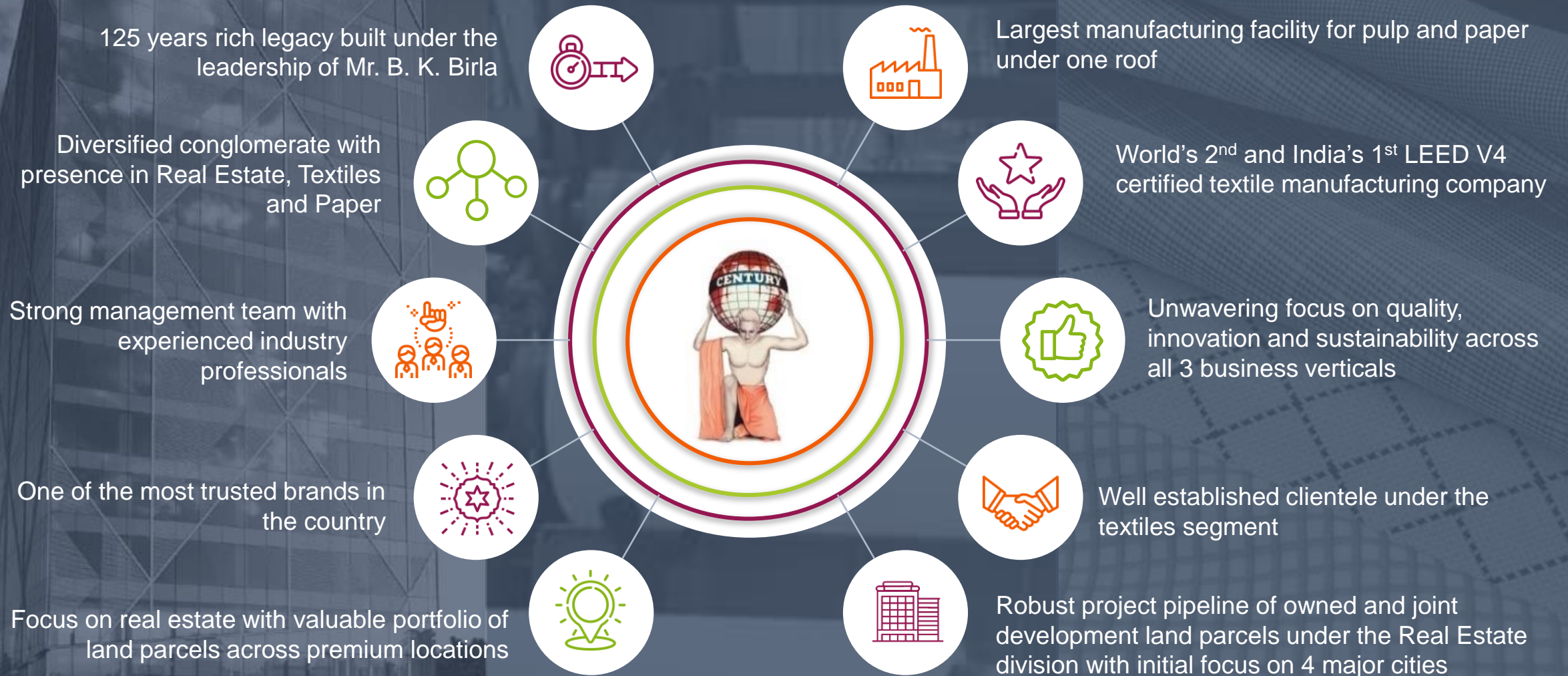
Pulp and Paper



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 125-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.

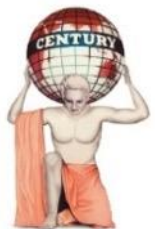
FY23 BUSINESS MIX



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.

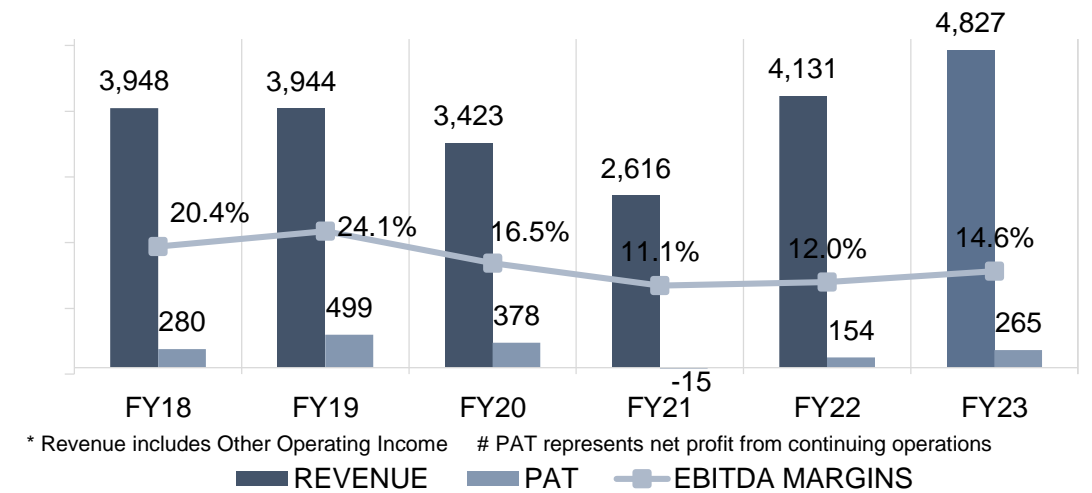


Century Pulp & Paper – is a producer of excellent quality writing and printing paper, and a leading manufacturer of tissue and board, as well as Rayon Grade Pulp products.

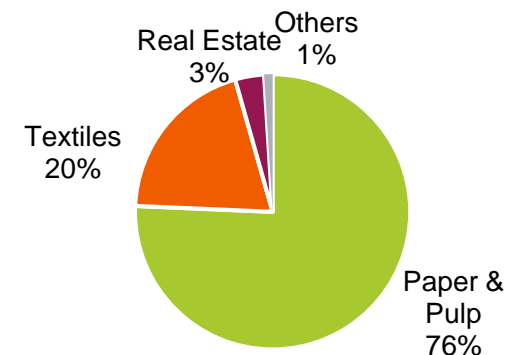


Birla Century - Produces a wide range of customised premium textiles which have applications in personal apparel and household linen.

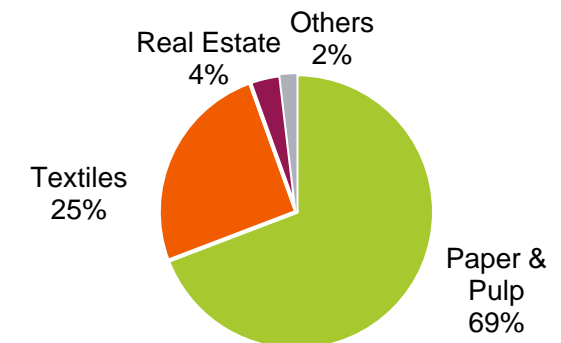
REVENUE* & PAT# (RS. IN CRORES) EBITDA MARGIN (%)



REVENUE MIX – FY23



REVENUE MIX – FY22



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. He was awarded the Padma Bhushan for his commendable contribution to the field of trade and industry in 2023. 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. R. K. Dalmia, Managing Director, Century Textiles & Industries Ltd. - 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. Vijay Kaul – Chief Executive Officer (CEO), Century Pulp and Paper – Mr. Vijay Kaul has worked with the Aditya Birla Group for close to four decades, during which he has handled many challenging assignments in Manufacturing and in Sales & Marketing. He has led manufacturing units and has set up various greenfield projects and has deep experience of commercialising new technologies. He holds a Bachelor's Degree in Engineering, also he has pursued various management programs at leading institutions such as Harvard Business School and Wharton School of Management to continuously upgrade his knowledge and managerial capabilities. He has also served as a member of IIM Indore Board and also on various committees of CII and FICCI.



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.



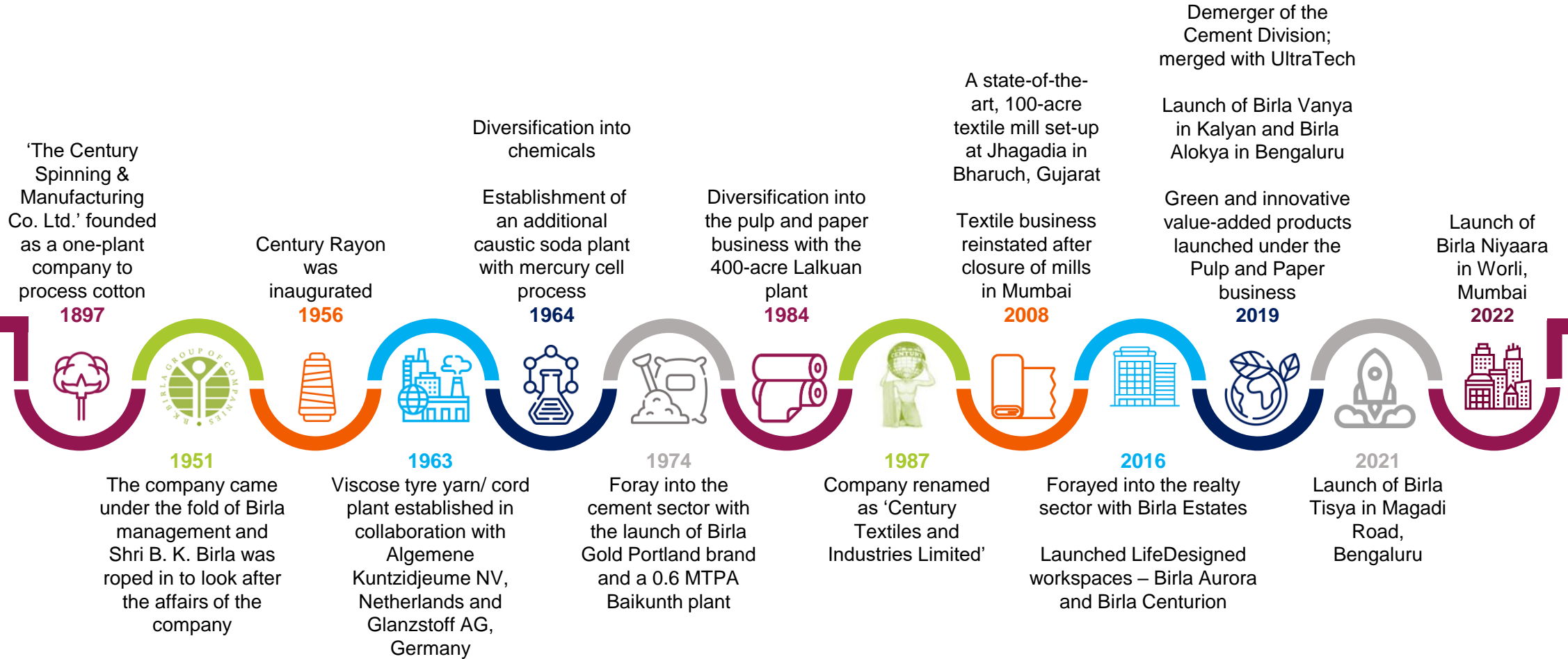
Mr. Snehal Shah – Chief Financial Officer (CFO) – Mr. Snehal Shah is a seasoned management professional specialising in business strategy with a cumulative experience of over 30 years in operations, business process, risk management MIS, administration, vendor management, and team building. His expertise 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.



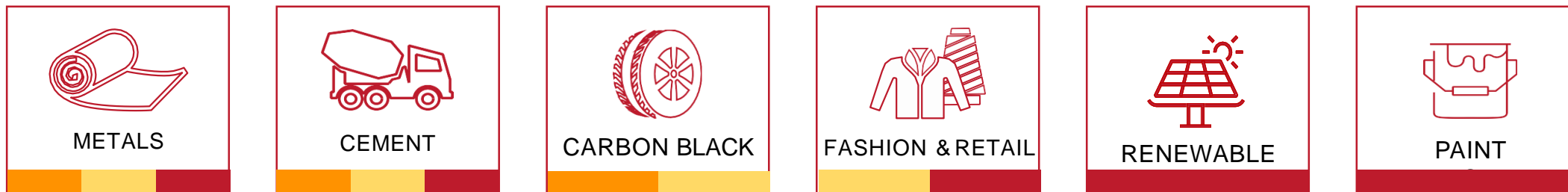
Mr. Atul K. Kedia – Vice President (Legal) and Company Secretary – Mr. Atul K. Kedia is Vice President (Legal), Company Secretary and Compliance Officer of the company. A Commerce and Law Graduate, he is a member of the Institute of Company Secretaries of India. He has been with the organisation for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

7 OUR JOURNEY

Summary



ADITYA BIRLA GROUP AT A GLANCE



■ Global Top 3
 ■ India Top 3
 ■ Future Growth Engine

US\$ 60 BN
CONGLOMERATE

130+
STATE-OF-THE-ART
GLOBAL
MANUFACTURING
FACILITIES

140K+
EMPLOYEES

<1x
NET DEBT TO EBITDA

60+
ACQUISITION MERGERS
FORAYS AND JV'S

US\$ 70 BN
CAPITAL INVESTED BY THE
GROUP ACROSS BUSINESSES
OVER THE LAST 15 YEARS

300 MN+
LOYAL CUSTOMER BASE

200K+
DEALERS & PARTNERS

36+
COUNTRIES



The Real Estate Arm of The Aditya Birla Group



Projects with a revenue potential of more than INR 35,000 Crs under development

(Including presales of ~INR 5,200 Crs)

- Birla Estates Private Limited, is a 100 per cent wholly owned subsidiary of Century Textiles and Industries Limited and is the real estate venture of the Aditya Birla Group
- The company is developing land parcels both through outright purchases as well as as well as asset light Joint Ventures apart from developing its own land parcels.
- 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 residential, commercial and mixed use segments and aims to be amongst the top real estate companies in India
- 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.
- The company plans to focus on 4 the key markets in India – MMR, Bengaluru, NCR & Pune.



EXECUTIVE SUMMARY - REAL ESTATE

RESIDENTIAL REAL ESTATE

LAUNCHED PROJECTS

- **Birla Vanya** - Birla Estates launched its first residential project in FY 20 in Kalyan, Maharashtra which sold almost 400 units in 3 days and has sold 69% of the total units till date.
- **Birla Alokya** - The villament homes project in Whitefield, Bengaluru has witnessed robust sales performance with 92% units sold till date.
- **Birla Navya** - Birla Navya, a low rise township project at Gurugram has witnessed stellar performance wherein 100% inventory of Phase 1 is sold out with more than 89% of the units launched sold out.
- **Birla Tisya** - Birla Tisya, a multi-storey twin towers residential project at Magadi Road, Bengaluru. The project has witnessed robust sales performance with 86% inventory sold out in the project till date.
- **Birla Niyaara** - Birla Niyaara, strategically located project in Mumbai has received robust sales response. Till the end of Q4 FY23 approx. Rs. 2,360 Crores of booking value has been generated and around 82% of the units are sold from the launched units.

NEW PROJECTS

- **Devanhalli, Bengaluru** - 52 acres at North Bengaluru to be developed as a township project providing holistic living in different formats
- **RR Nagar, Bengaluru** - 10-acres at Raja Rajeshwari Nagar in South Bengaluru to be developed as high rise luxury residences
- **Sangamwadi, Pune** - 5.76 acres in the heart of Pune to be developed as a premium residential project with curated amenities and setting new benchmarks of contemporary living.
- **Walkeshwar, Mumbai** - 0.25 acres in South Mumbai to be developed as a high end luxury residential project
- **Sarjapur, Bengaluru** - 28.6-acre prime land parcel to be developed as a high end residential complex with convenience retail.

with a combined total **revenue potential** upwards of **INR 10,000 Crs**

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.



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:

- Judicious mix of outright land purchase and a JV/JD asset light projects
- 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



AWARDS & CERTIFICATIONS



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



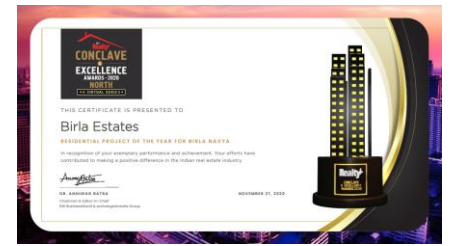
Green Building Project of the Year
ET Now Presents Real Estate Awards



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)



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

AWARDS & CERTIFICATIONS

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Real Estate

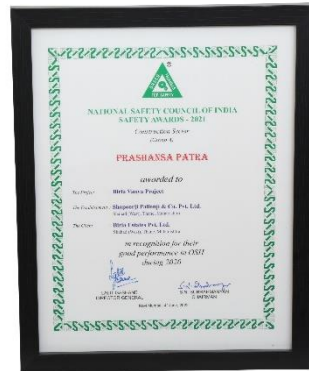
Pulp & Paper

Textiles

Financials



Birla Alokya
National Safety
Council of India -
Safety Awards 2021



Birla Vanya
National Safety
Council of India -
Safety Awards 2021



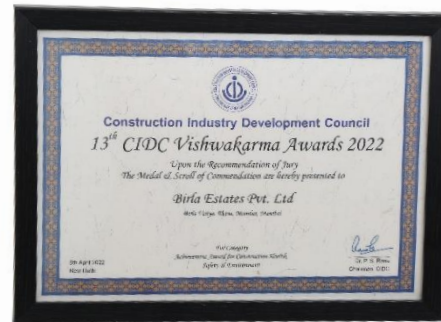
**Commercial Birla
Birla Vanya**
RoSPA - Health and
Safety Awards 2022



Birla Estates
CIDC Partners in
Progress Trophy -
2022



Birla Vanya
Greentech
Effective Safety
Culture Award -
2021



Birla Vanya
13th CIDC Vishwakarma
Awards - 2022



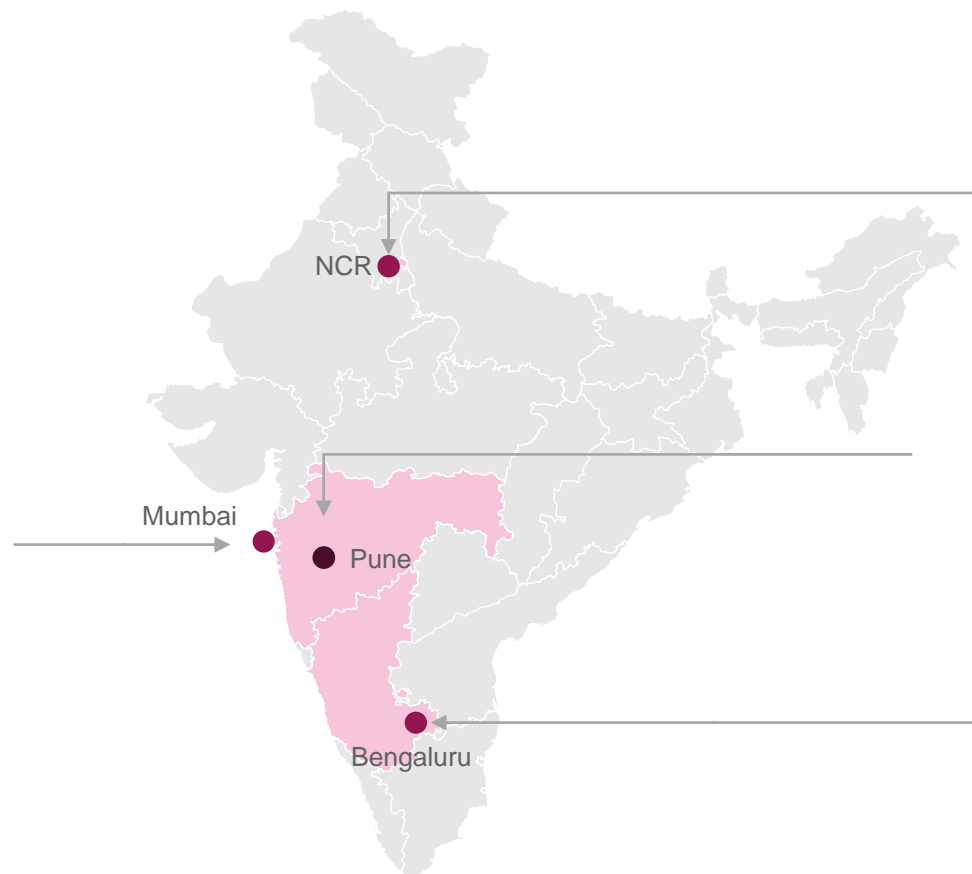
Birla Alokya
National Safety
Council of India



GEOGRAPHICAL PRESENCE



- Birla Vanya, Kalyan
- Birla Niyaara, Worli
- Walkeshwar, South Mumbai
- Birla Centurion, Worli (C)
- Birla Aurora, Worli (C)



Birla Navya, Golf Course Extension Road

Sangamwadi, Central Pune

Birla Alokya, Whitefield

Birla Tisya, Magadi Road

RR Nagar

Devanhalli, North Bengaluru

Sarjapur

- Yet to be Launched
- Existing

(C) - Commercial

LAUNCHED PROJECTS UPDATE

Project	Birla Vanya, (Kalyan)	Birla Alokya, (Whitefield, Bengaluru)	Birla Navya, (Golf Course Extension, Gurugram)	Birla Niyaara, (Worli, Mumbai)	Birla Tisya, (Rajajinagar, Bengaluru)
Project Photo					
Launch Period	Q1 FY20	Q3 FY20	Q3 FY21	Q4 FY22	Q3 FY22
Land Area	22 acres (Own)	8 acres (Own)	48 acres (JV)	14 acres (Own)	5 acres (JV)
Total Saleable Area	13.3 lac sqft	5.5 lakh sqft	18.5 lakh sqft (Ph 1+2 – 9.4)	24 lakh sqft (Residential) (Ph 1 – 9.1)	6.5 lakh sqft
Total Units	1,205 units	Rs. 394 Crs (218 units)	Launched - 556 units	Launched 414 units	392 units
Cum. Booking Value	Rs. 652 Crs	Rs. 353 Crs	Rs. 1,302 Crs	Rs. 2,360 Crs	Rs. 513 Crs
Architect	Hafeez Contractor	Synergy	ARCOP	Foster & Partners	RSP
Construction Status	Super structure and Finishing under progress	Super structure and Finishing under progress	Super structure and Finishing under progress	Podium under progress	Superstructure under progress

ENVIRONMENT SOCIAL GOVERNANCE (ESG) – REAL ESTATE – FY 23



ENVIRONMENT

We tied up with BMC to provide ‘Exercise + Green’ bus stops on the Pandurang Budhkar Marg

Vanotsav – a customer engagement event with Green theme



ENVIRONMENT SOCIAL GOVERNANCE (ESG) – REAL ESTATE – FY 23



SOCIAL

Masterclass – an online customer engagement event promoting healthy living



Medical and Blood Donation Camp at the Vanya, Navya, Niyaara and Tisya project sites as part of National Safety Week Celebrations



Predict and Win – a customer engagement event with IPL theme



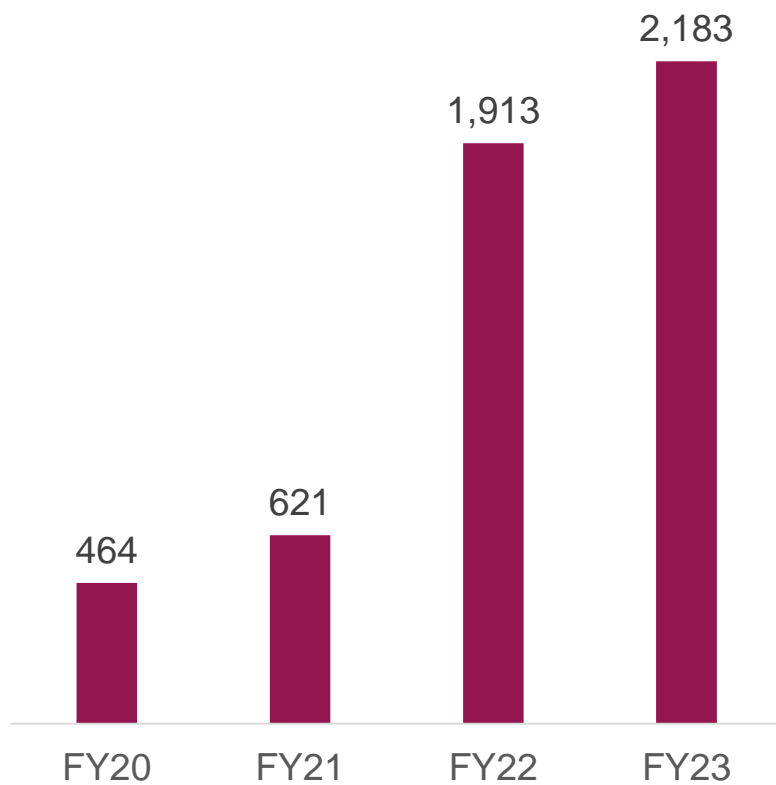
Governance - Robust compliances of all statutory regulations



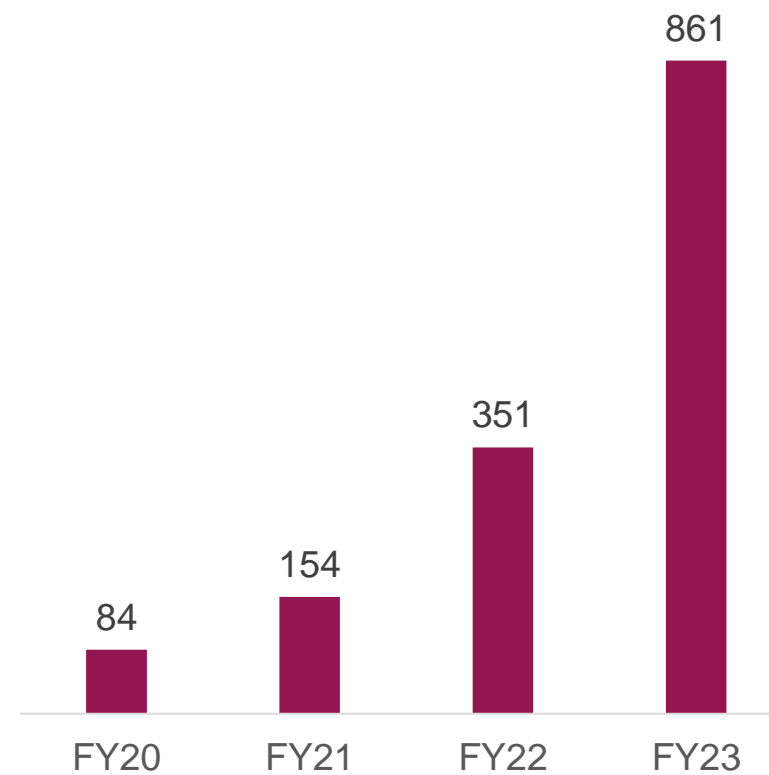
RESIDENTIAL HIGHLIGHTS



Booking Value



Collections



Figures in INR Crs



Pulp & Paper

Flag bearer in Paper Industry

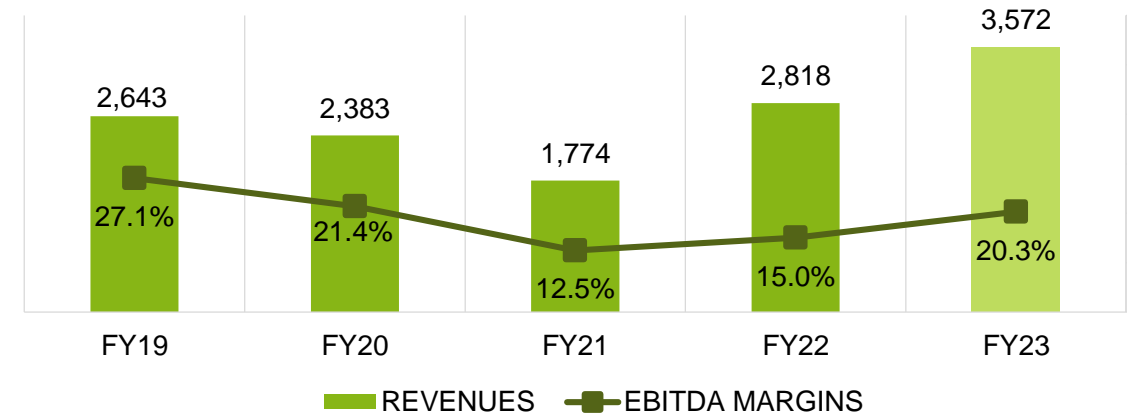
PULP & PAPER - EXECUTIVE SUMMARY

- 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.

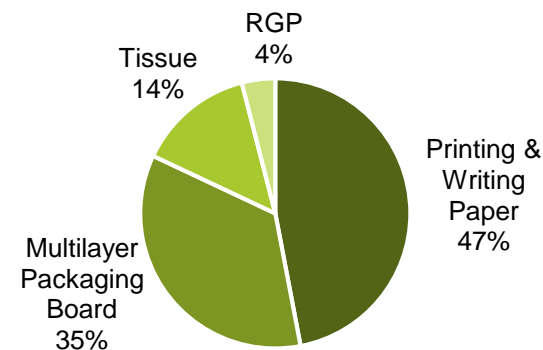
PRODUCT PORTFOLIO

- **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.

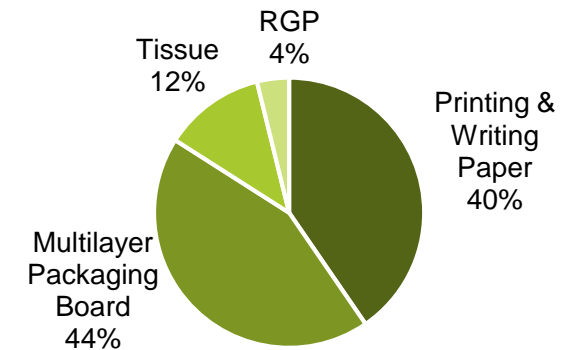
TURNOVER (RS. IN CRORES) & EBITDA MARGINS (%)



REVENUE MIX – FY23



REVENUE MIX – FY22



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 94% of the total requirement

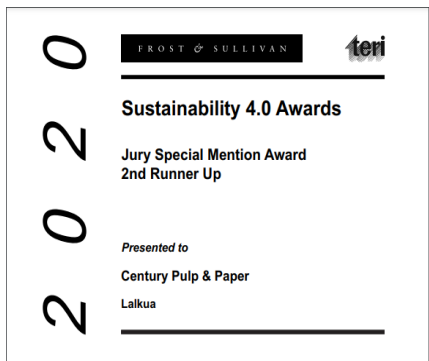
Encash on:

- 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 (2020-22)



- 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 111th “All India Farmer’ Fair and Agro-Industrial Exhibition – 2022”, organised by and held at G B Pant University of Agriculture & Technology, Pantnagar, Uttarakhand, the Division has received First prize.
- Golden Peacock Award for Energy Efficiency 2021 from Institute of Directors, India
- CONCOR Award 2021: Certificate of Appreciation in recognition of outstanding business association organised by Container Corporation of India Ltd., the division was awarded as “Importer- First Position”.

Century Pulp and Paper is the holder of following certifications:



ISO 9001



ISO 14001



OHSAS 18001



FSC C104223

GEOGRAPHICAL PRESENCE

Real Estate



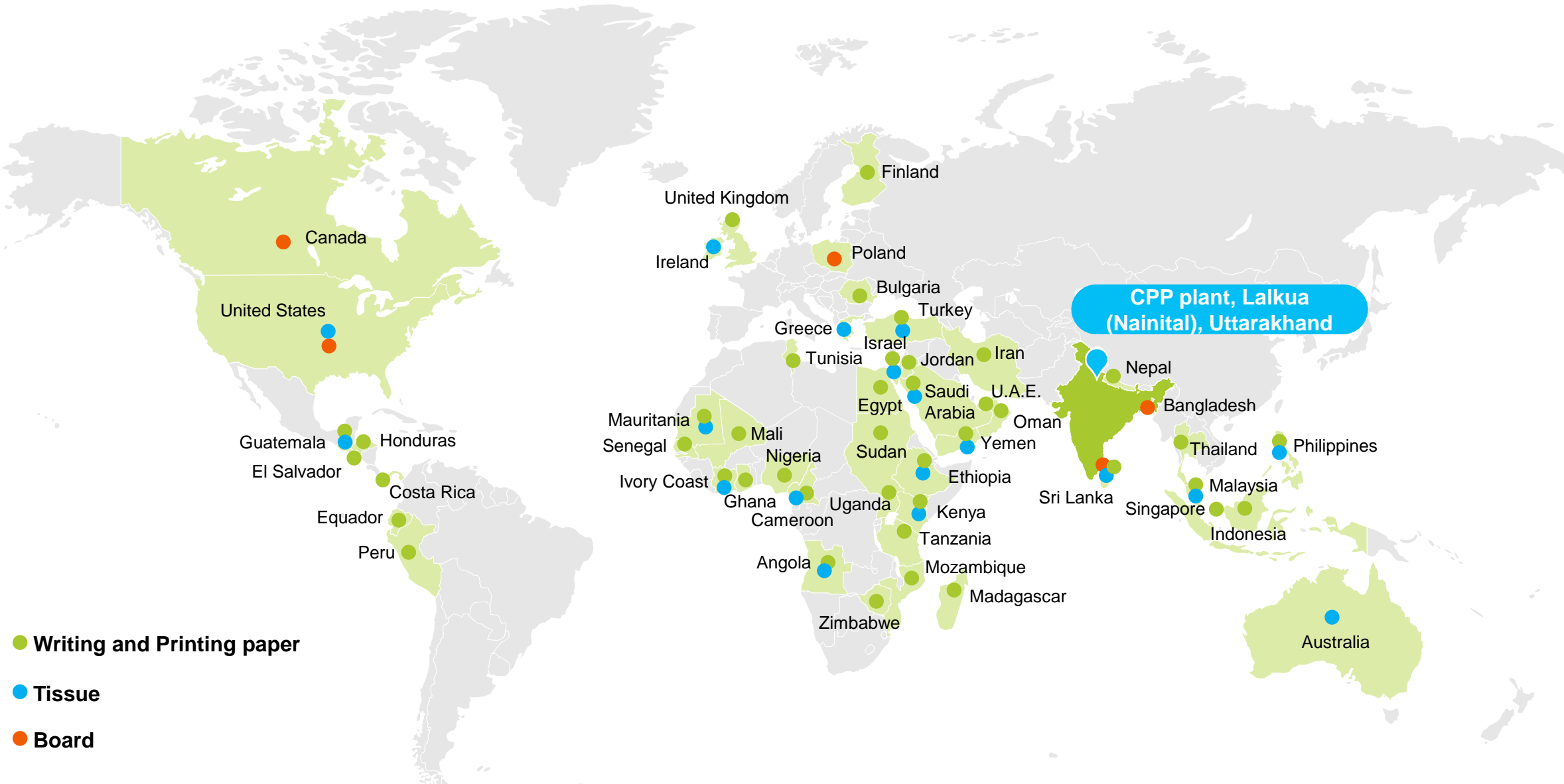
Pulp & Paper



Textiles



Financials



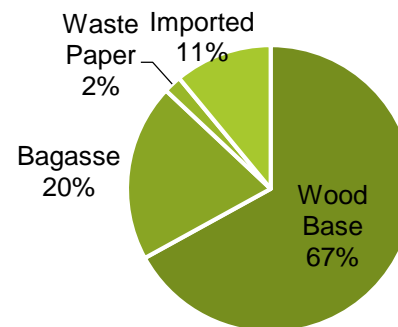
- Writing and Printing paper
- Tissue
- Board

CENTURY PULP & PAPER MILL – MANUFACTURING CAPACITIES

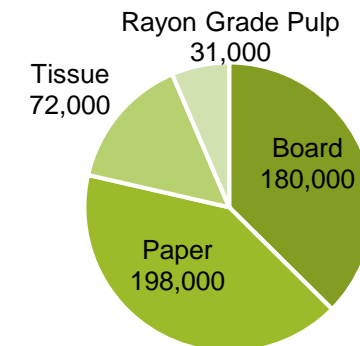
- Established in **1984**, the manufacturing facility is **India's only integrated Pulp and Paper mill** that delivers **comprehensive solutions in finest varieties** of Writing & Printing Paper, Virgin fiber grade fine tissue, Multilayer Packaging Board and Rayon Grade Pulp.
- Situated at the foothills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



RAW MATERIAL FLEXIBILITY (VOLUME IN MT) - FY23



PRODUCTION CAPACITY BREAK-UP (TONS/PER YEAR)



4.81 Lakh MTPA	> 6,500 (Approx)
Total Capacity	Manpower
87 MW (Self Generation Turbine)	Rs. 3,040 Cr (31 st March 2023)
Power	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

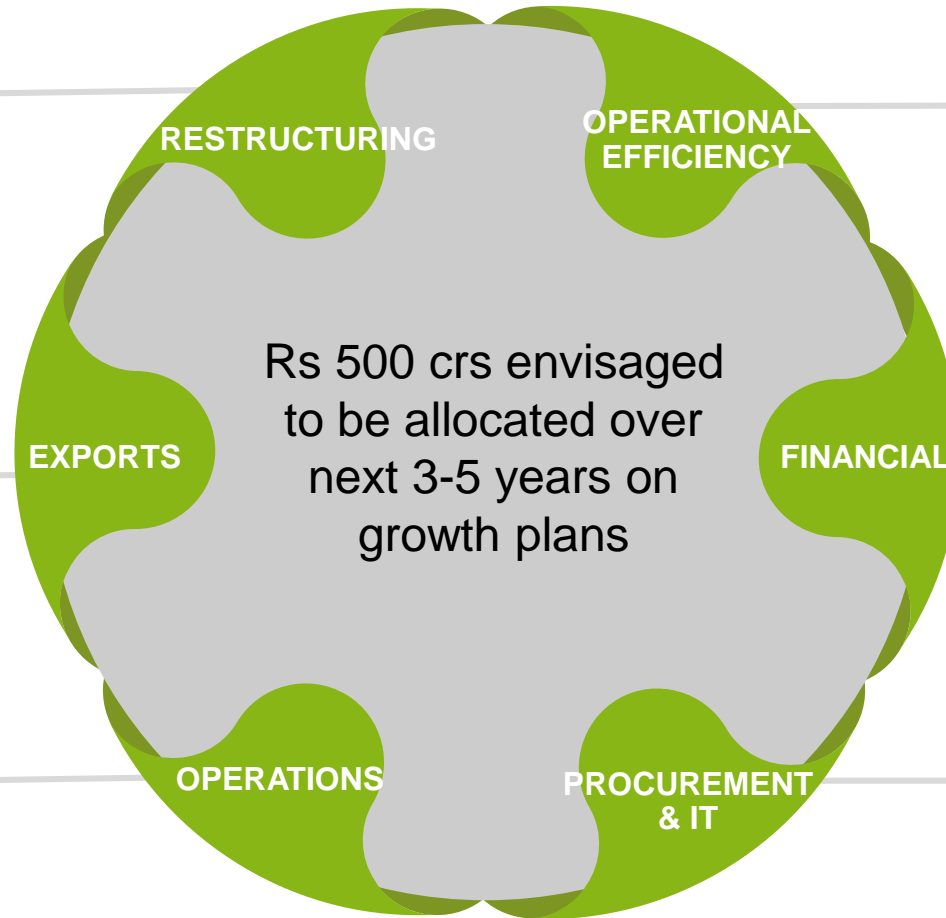


Financials



Workmen Optimization
Marketing Function to be created along with sales function. Market intelligence set up to be created. New positions to be inducted to create Nomination/ Direct customer/ Dealer business segment. Plant to have focus on pulp & paper separately.

Fibreline & Rec Boiler BCTMP Plant
New Recovery Boiler/Turbine
43MW Turbine Energy Savings Projects



Working Capital Optimization
Effective Management of debtors
Inventory Management based on per ton/ per day consumption

Opportunistic approach towards exports

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

Sustainable Wood Procurement
Cost Effective Pulp combination
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:

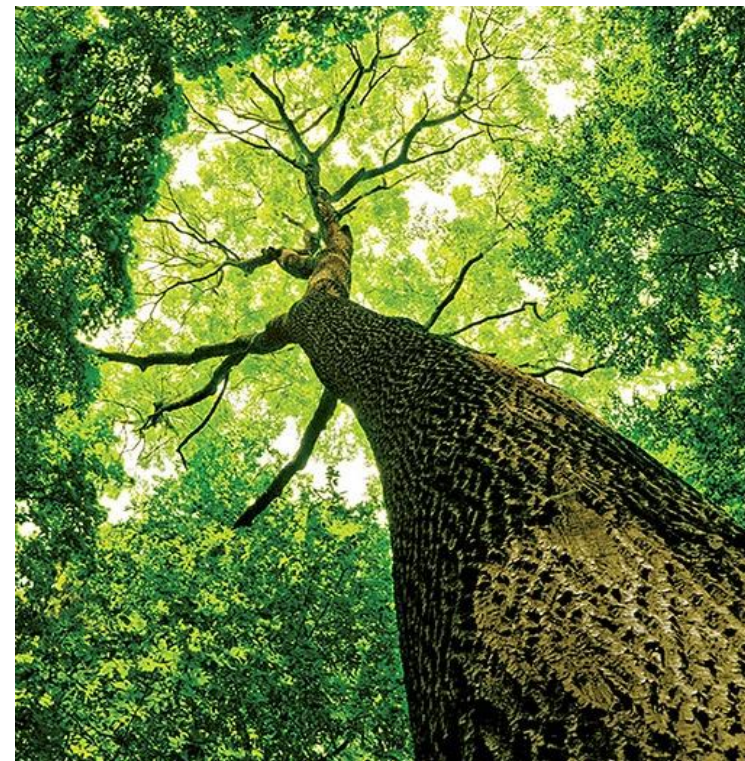
- (a) Efforts made towards technology absorption:
 - i) Upgradation of COL system at PM#3
 - ii) WPP Calendar upgradation
 - iii) Industry 4.0 at PM#4
- (b) Benefits derived as a result of above efforts.
 - i) Reduction in Power consumption
 - ii) Quality Improvement.
 - iii) Reduction in Steam consumption

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




SOCIAL



Development of grassland and water holes for wildlife at Forest Division Haldwani

- ▶ Grassland restoration increases the area of grazing ground for both livestock and wild ungulates. Water holes will provide drinking water for wildlife as well as recharge ground water thus helping in creating a sustainable environment.
- ▶ Catering to about 10000 direct and indirect beneficiaries.

- ▶ Installation of 37 Nos. of Hand pumps for drinking water at Bindukhatta, Lalkua & Shanti Puri. Catering to about 4000 Nos. of direct beneficiaries.
- ▶ Community Medical camp was organized at Government Inter-College, Lalkua on Feb 26, 2023, with a team of expert doctors including physicians, ENT Specialists, Gynecologist, Child specialist, Neurologist and pathologist.
 - ▶ Free medicines provided with required checkup
 - ▶ Direct beneficiaries of the camp - 748 Nos.

STRATEGIC PERFORMANCE (2015-2023)

Real Estate

Pulp & Paper



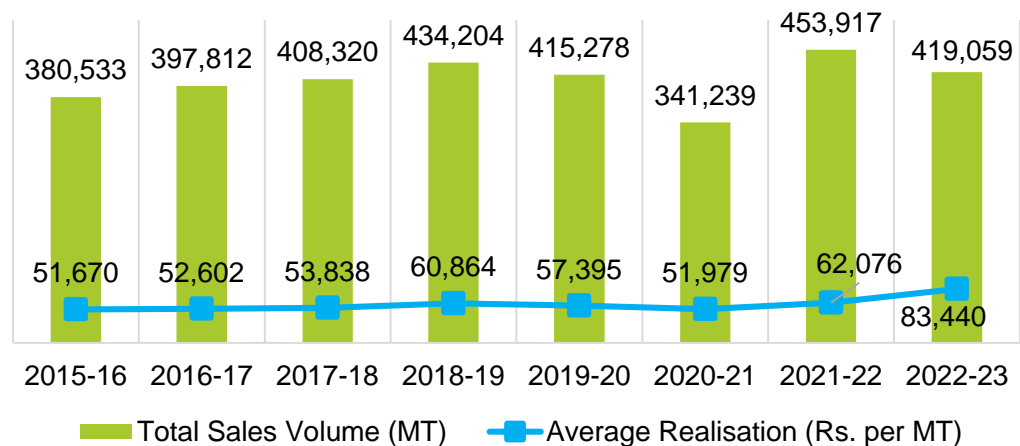
Textiles



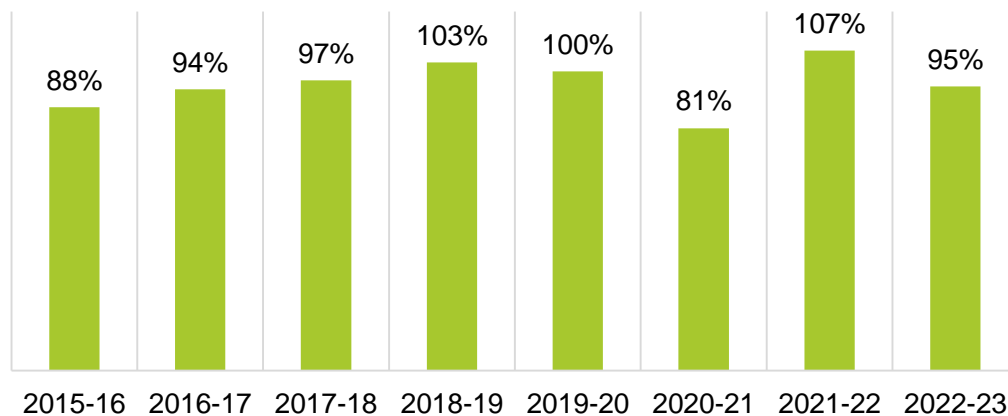
Financials



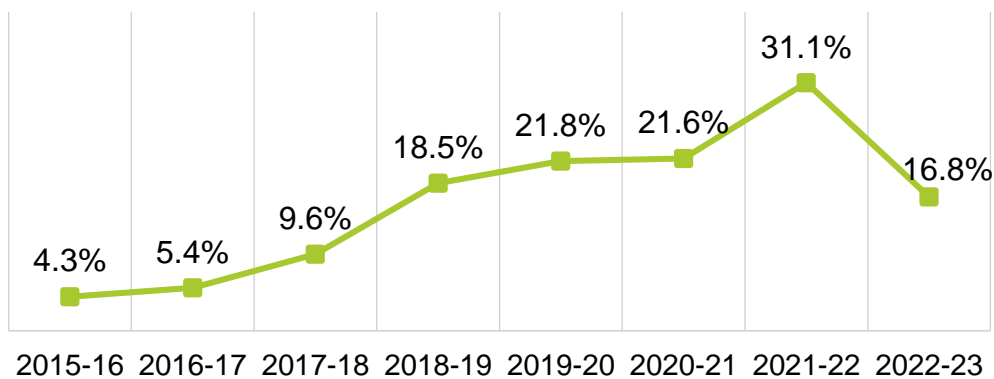
HISTORICAL SALES VOLUMES AND REALISATIONS



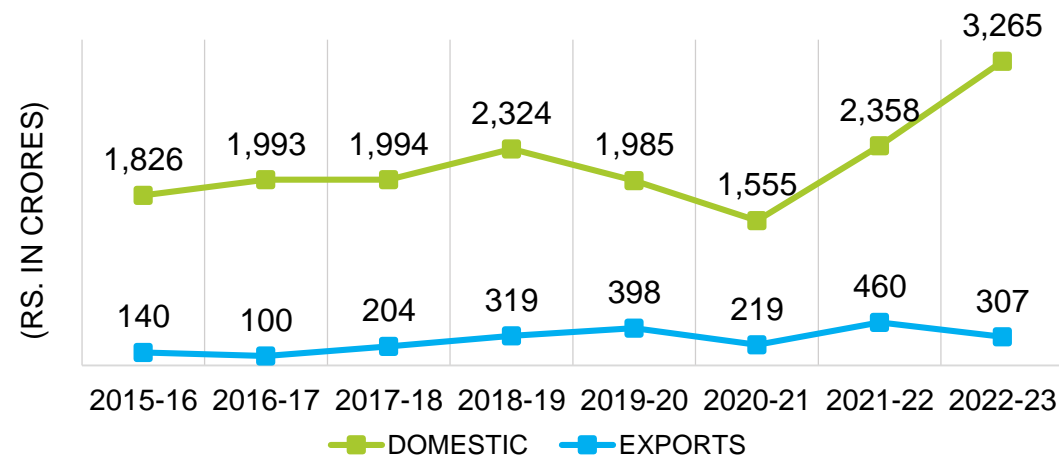
CAPACITY UTILIZATION PERCENTAGE



VOLUMES FROM VALUE ADDED PRODUCTS (%)



SALES TURNOVER DOMESTIC EXPORTS





Textiles

World's 2nd and India's 1st LEED V4 certified Textile Mfg. Co.



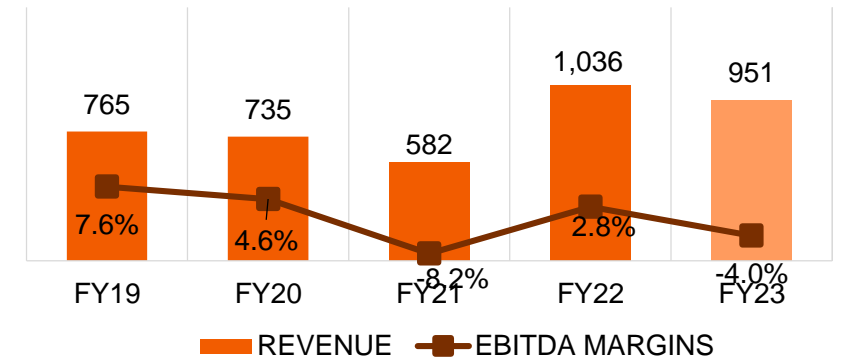
EXECUTIVE SUMMARY – CENTURY TEXTILES

- 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.

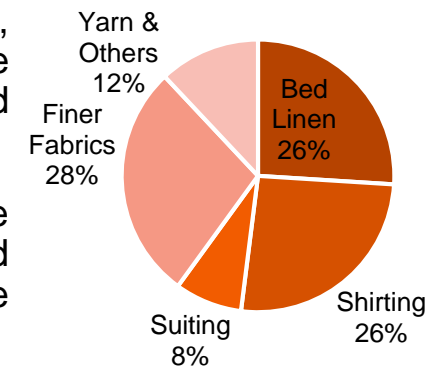
PRODUCT PORTFOLIO

- **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.

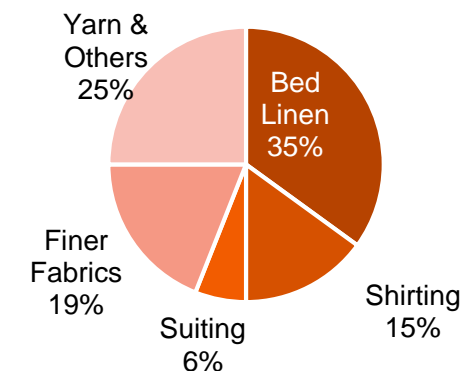
TURNOVER (RS. IN CRORES) & EBITDA MARGINS (%)



REVENUE MIX – FY23



REVENUE MIX – FY22





STEP TOWARDS MORE FOCUS ON GROWING BUSINESS



Strengths

- 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



Growth Drivers

- 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.



Advantages

- 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

35
Real Estate
Pulp & Paper
Textiles
Financials



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)

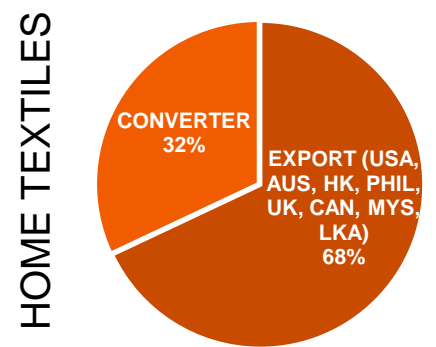
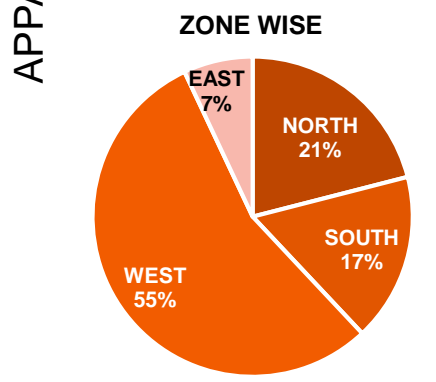
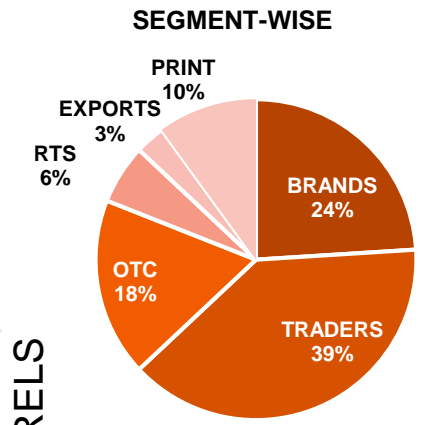
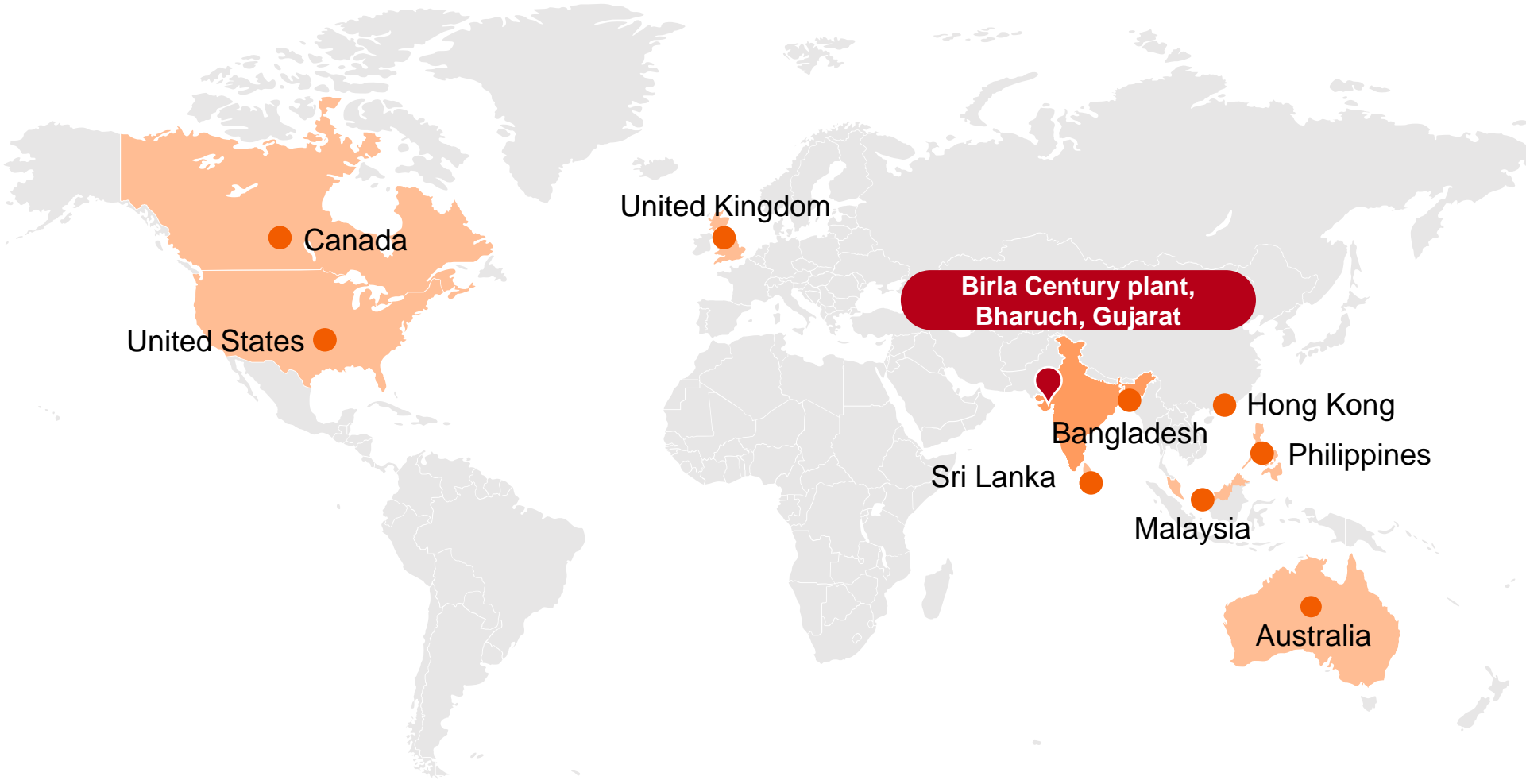


Global Organic textile Standards (GOTS)

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.



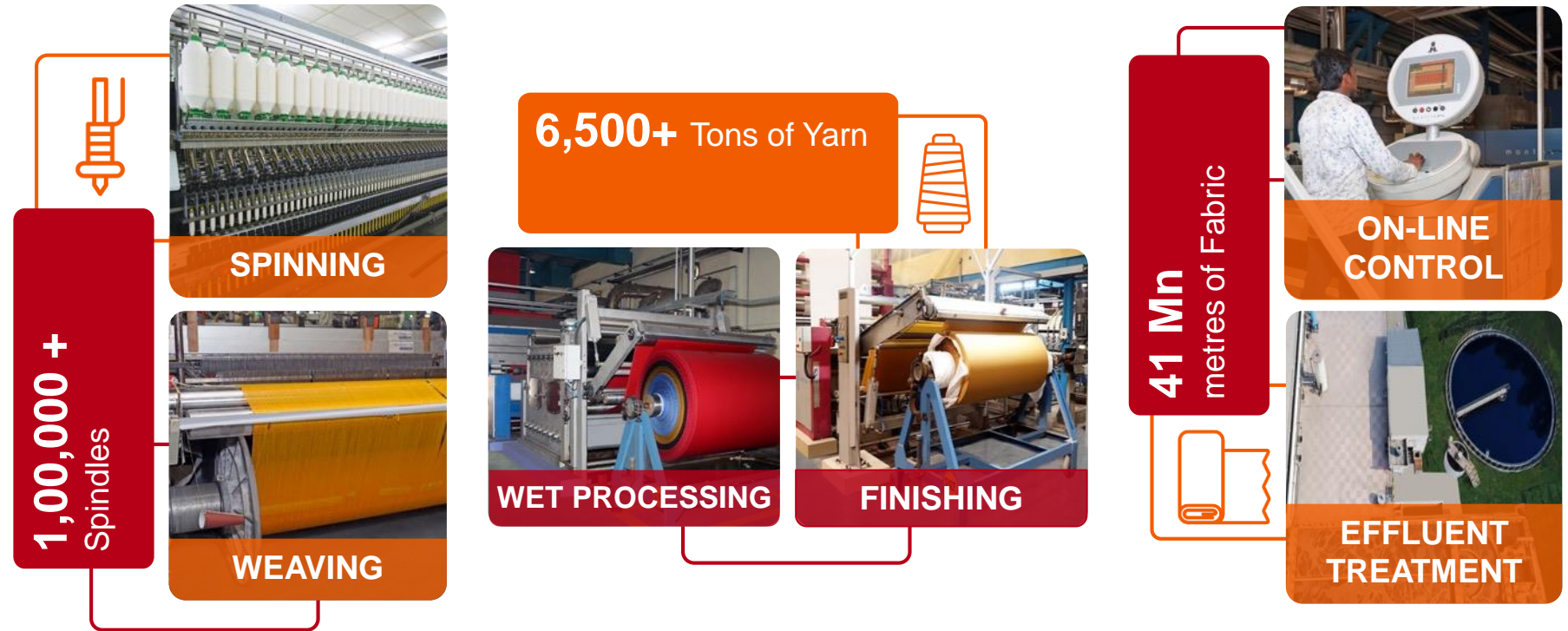
GEOGRAPHICAL PRESENCE





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

SHIRTINGS



- 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

BED LINEN

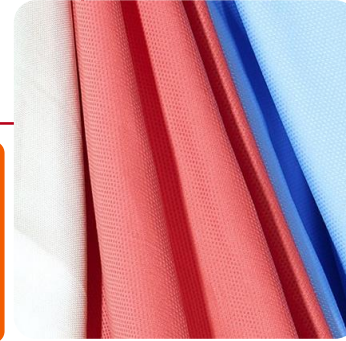


- Birla Century is one of the leading bed and bath linen manufacturers in India.
- Birla Century's bed linen products come in innovative finishes like MXL, easy iron, easy care, anti-wrinkle, aroma, water repellent, anti-bacterial etc.
- The products are manufactured with yarn made of 100 per cent cotton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

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 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

BOTTOM WEIGHTS



- 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 SOCIAL GOVERNANCE (ESG) – TEXTILES



ENVIRONMENT



- Birla Century received **PLATINUM** category in SSI (Suppliers Sustainability Index) assessment of Aditya Birla Fashion & Retail Limited.
- Sustainability Index is a rating system designed to gauge the sustainability of supply chain. It provides an all-encompassing evaluation of a supplier's ESG performance, culminating in a singular score

Overall Score	300
Score Achieved (Round off)	277
Rating	Platinum

SOCIAL

CSR initiative of
BIRLA CENTURY, JHAGADIA
MO:8264029259

प्राकृतिक कृषिનો ઉપહાર ખેડૂતોની પ્રગતિ અપરંપાર

PRAGATI : Rural Development Project for Organic Farming
(પ્રાકૃતિક ખેતી અપનાવી ખેતીની આવક વધારો)

- Birla Century Designed sustainable & easily adoptable solution i.e vermicompost plant. We have installed this unit at 200 farms where farmer producing fertilizers through vermicompost plant & doing organic farming as well as selling fertilizers in the market for organic farming on handsome cost.
- Recently we have done appreciation ceremony for farmers for their efforts and Our chief Guest was SDM- Jhagadia.

GOVERNANCE

OEKO TEX®
STANDARD 100
22.HIN.45123
HOHENSTEIN HTTI

ORGANIC

COMMISSION DYEING & FINISHING

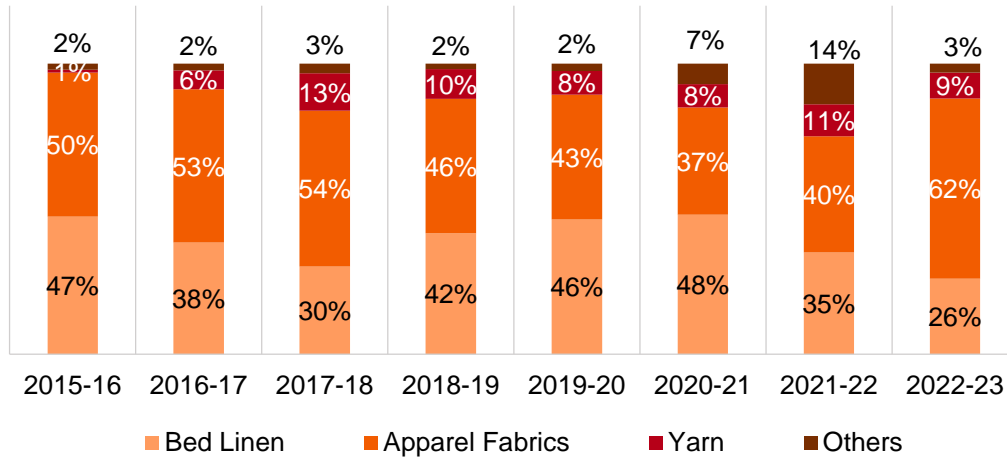
OEKO TEX®
STANDARD 100
22.HIN.44922
HOHENSTEIN HTTI

- Oeko-Tex for organic products: We can offer Organic & Oeko-Tex certified product in the market, it means product manufactured with sustainable fiber & used ecofriendly dyes chemicals which are tested by Oeko -Tex for more than 300 hazardous chemicals.
- Oeko -Tex certification for Commission Dyeing & finishing: Now we can cater customer those wants to process their greige fabric in Birla Century, Its opened new business opportunity to us

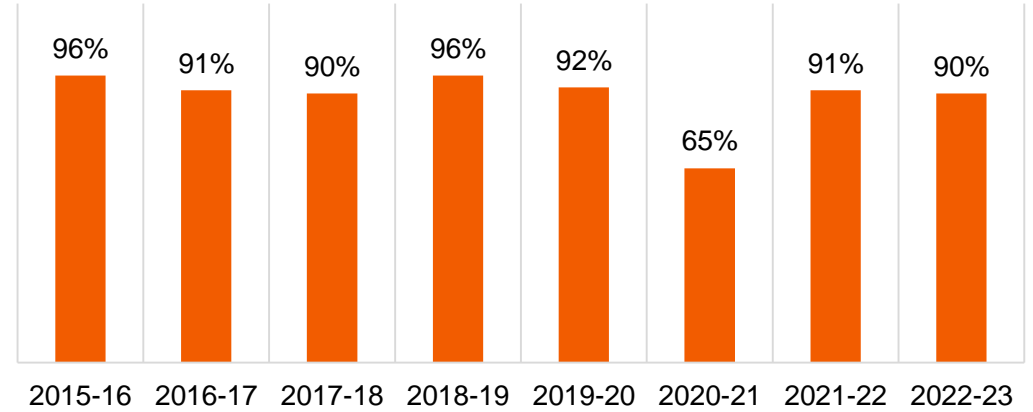


BIRLA CENTURY, STRATEGIC PERFORMANCE

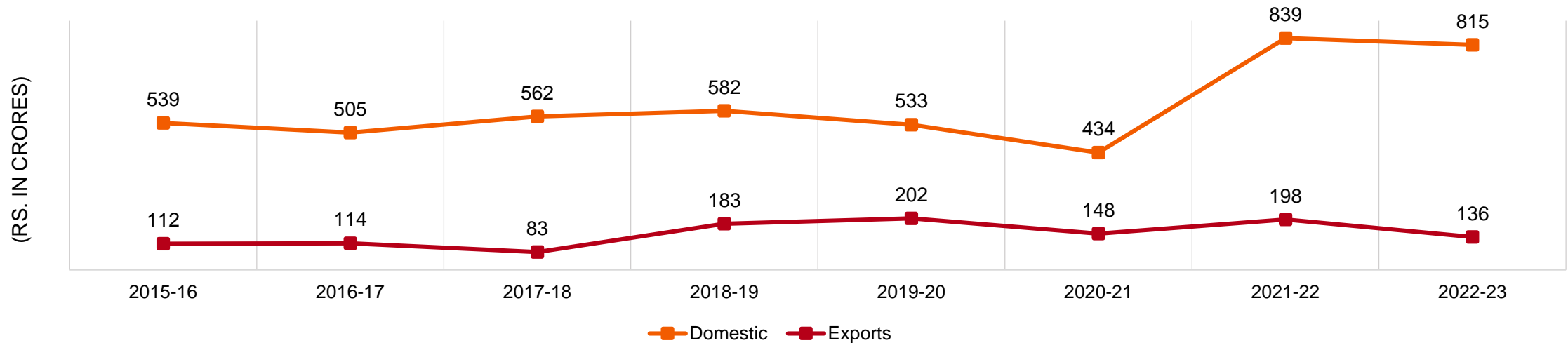
BUSINESS MIX



CAPACITY UTILIZATION PERCENTAGE



SALES TURNOVER





Financial Summary

Excellent financial performance during the year as compared to FY22

HISTORICAL CONSOLIDATED FINANCIAL PERFORMANCE

(RS. IN CRORES)

Particulars	FY19	FY20	FY21	FY22	FY23
Continuing Operations					
Sales					
Textiles	765	735	582	1,036	951
Pulp & Paper	2,643	2,383	1,774	2,818	3,572
Real Estate	159	146	142	140	137
Others	66	67	69	74	59
Total Sales	3,633	3,331	2,567	4,068	4,719
EBITDA					
Textiles	58	34	-48	29	-38
Pulp & Paper	716	511	221	424	725
Real Estate	232	4	31	-22	-50
Others	55	51	48	56	50
Interest income of income tax refund	-	-	33	-	-
Total EBITDA	1,061	600	285	487	687
Less : Finance Cost	102	87	71	52	54
PBDT	959	513	214	434	633
Less : Depreciation	193	229	230	231	227
PBT	766	284	-16	204	407
Tax	266	-94	-1	50	142
Net Profit after tax	500	378	-15	154	265
Discontinuing Operations					
Profit after tax	-30	-17	-19	8	-
Total Net profit after tax	470	361	-34	162	265

CASH FLOW – FY23

(RS. IN CRORES)

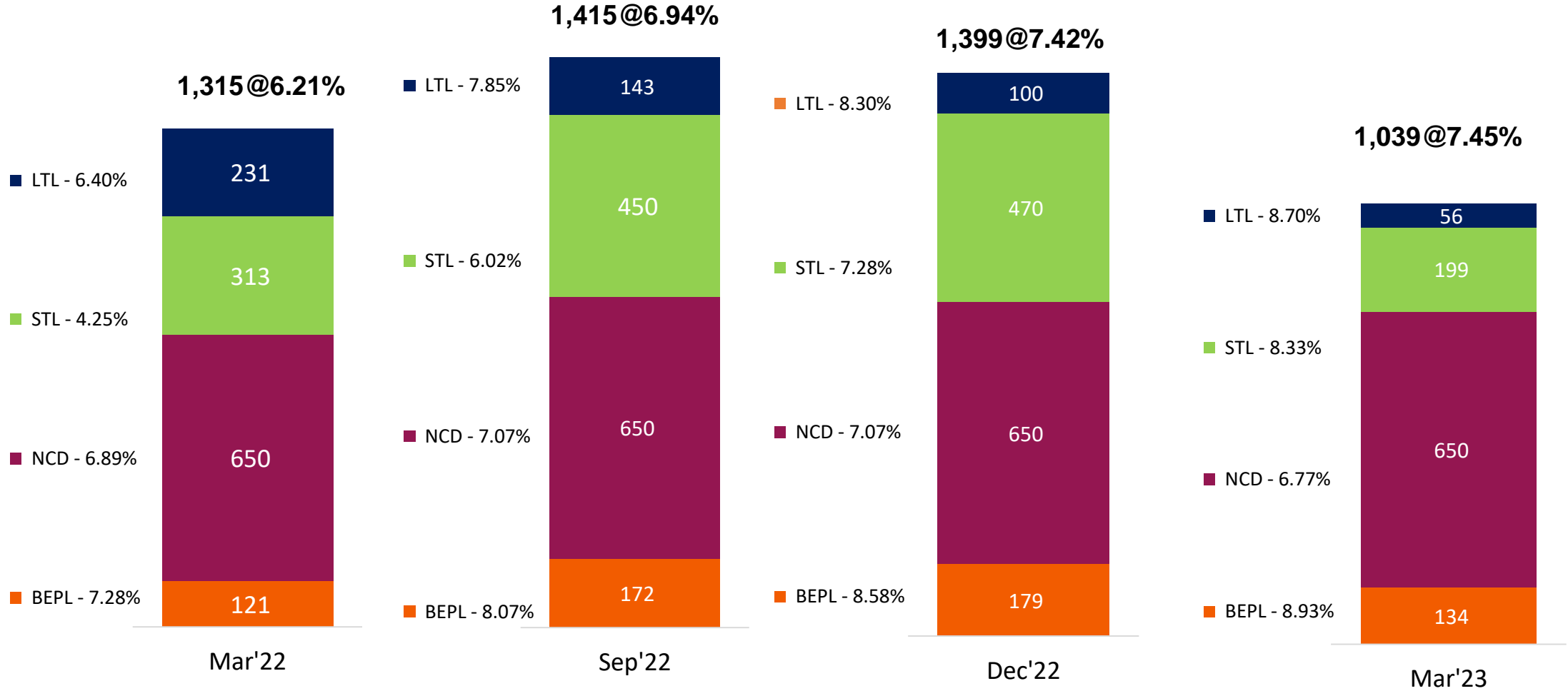
No	Particulars	Textile	Rayon	Pulp & Paper	Birla Estates	H.O.	Grand Total
	EBITDA-Normal Business	(38)	52	591	(50)		555
	EBITDA-Exceptional Item			156			156
	MAT Paid					(71)	(71)
	Dividend Paid (Including Tax)					(45)	(45)
	Collections				861		861
	Project Development Cost				(902)		(902)
	Net Change in Working Capital	24	(42)	(153)	26		(145)
A)	Operating Cash Flow	(14)	10	594	(65)	(116)	409
	Capital Expenditure	(20)	-	(83)	(9)	(3)	(115)
B)	Investing Cash Flow	(20)	-	(83)	(9)	(3)	(115)
	Interest	(20)	(7)	(11)	(16)		(54)
	Equity Investment in JV					(10)	(10)
C)	Financing Cash Flow	(20)	(7)	(11)	(16)	(10)	(64)
D)	Free Cash Flow (A+B+C)	(54)	3	500	(90)	(129)	230
E)	Capex done on behalf of BAKPL					(10)	(10)
F)	Free Cash Flow-CTIL & BAKPL (D+E)						220
	<u>Sources of Fund Required</u>						
	Loan Taken / (Repaid)						(276)
	Bank Balance & Investment Reduced /(Increase)						56
	Net						(220)

CAPITAL EMPLOYED – AS ON 31st MARCH, 2023

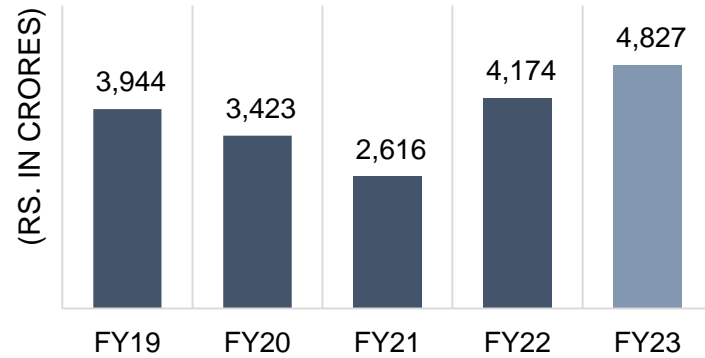
(RS. IN CRORES)

No	Particulars	Continued operations				
		Textile	Rayon	Pulp & Paper	Birla Estates	Total
A)	Net Block	363	226	2357	1162	4,108
B)	(i) Current & Non Current Assets					
	Inventory	184	0	585	2372	3,141
	Debtors	114	0	40	0	154
	Other Assets	32	20	91	440	583
	Sub-Total	330	20	716	2,812	3,878
	(ii) Current & Non Current Liabilities					
	Creditors	274	0	370	103	747
	Other Liability	9	733	168	1595	2505
	Sub-Total	283	733	538	1698	3,252
	Net Working Capital (i-ii)	47	-713	178	1114	626
	Net Working Capital (March 22)	71	-755	25	1083	424
C)	Cash & Bank Balances	0	6	2	74	82
D)	Capital Employed in the Segment	410	-481	2537	2350	4816
F)	Loan Allotment to Segment	30	0	101	908	1039
	i. Specific Loan	30			283	313
	ii. Allocated Loan			101	625	726
Ratios						
	Debt / Equity					0.26

OUTSTANDING LOAN

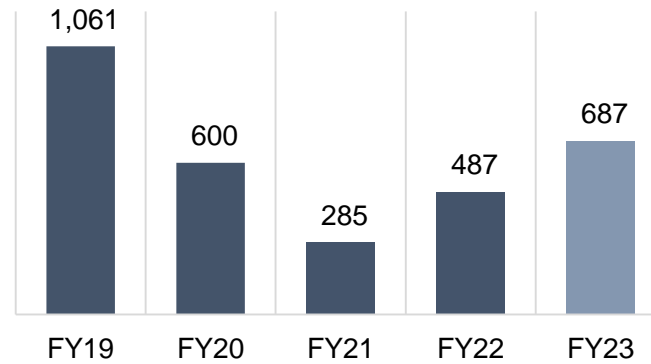


REVENUES* (RS. IN CRORES)

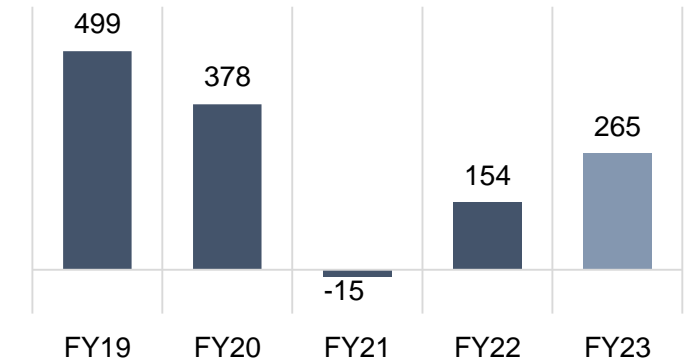


* Revenue includes Other Operating Income

EBITDA (RS. IN CRORES)

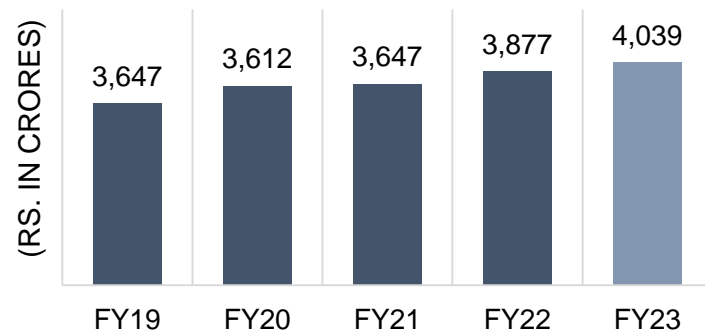


PAT# (RS. IN CRORES)

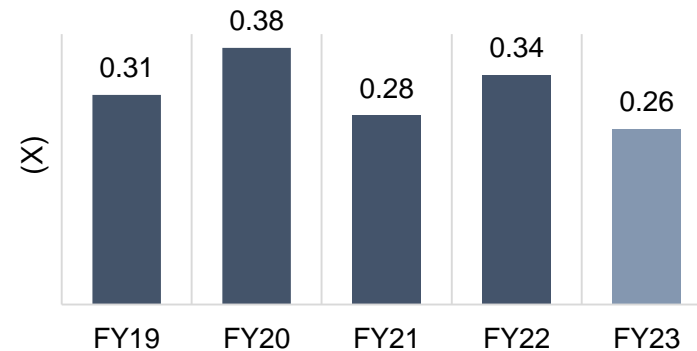


PAT represents net profit from continuing operations

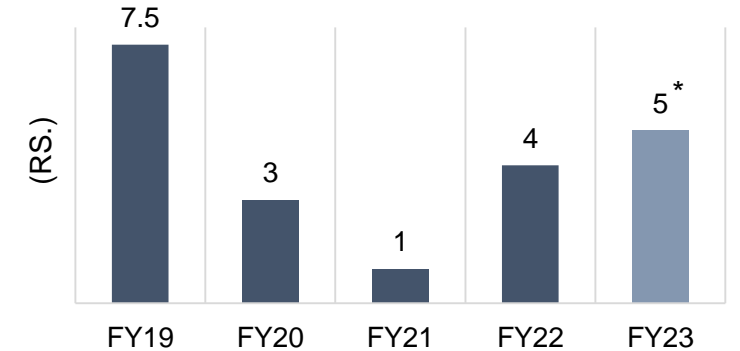
NET WORTH (RS. IN CRORES)



NET DEBT TO EQUITY (X)



DIVIDEND PER SHARE (RS.)



* - Recommended

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Century Textiles and Industries Limited

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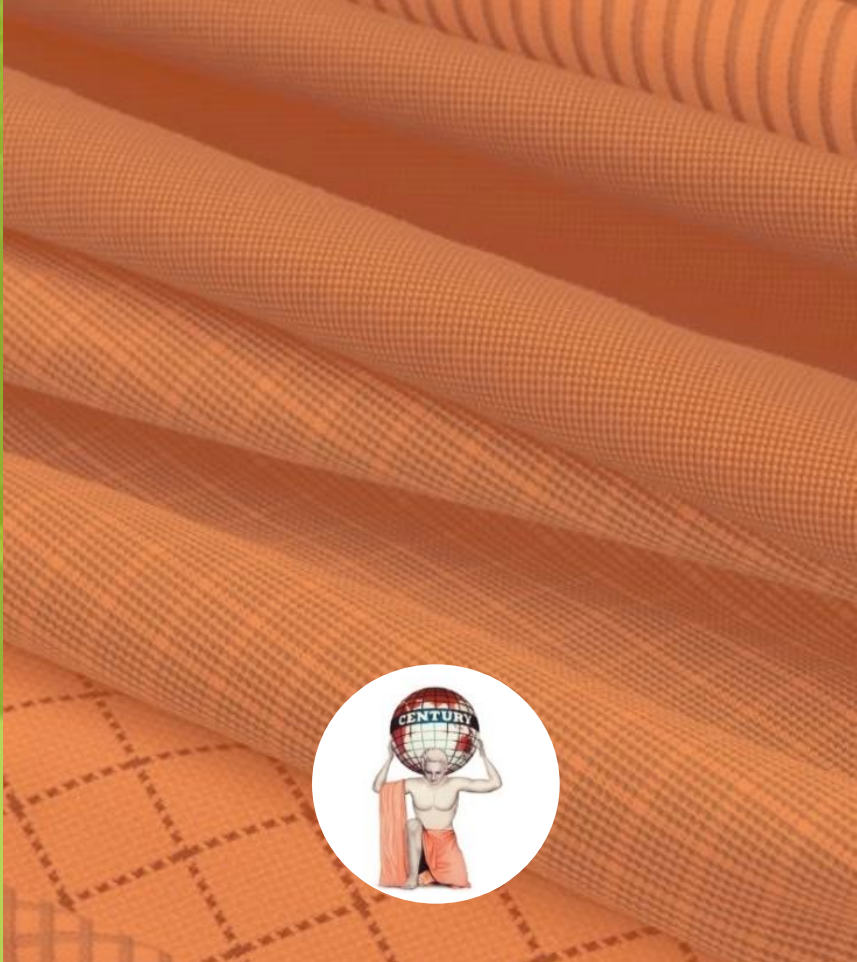
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