

WIL/SEC/2020

July 24, 2020

Bombay Stock Exchange Limited Department of Corporate Services, SP. J. Towers, Dalal Street, Mumbai – 400 001 (Scrip Code-514162)	National Stock Exchange of India Limited Listing Compliance Department Exchange Plaza, Bandra-Kurla Complex, Bandra (E), Mumbai – 400 051 (Symbol: WELSPUNIND)
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Dear Sirs/ Madam,

Subject: Disclosure of information pursuant to Regulation 30 read with Part A of Schedule III of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015.

In compliance with Regulation 30 read with Part A of Schedule III of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 and the Company's Code of Practices and Procedure for Fair Disclosure of Unpublished Price Sensitive Information, kindly find attached investor presentation, inter alia, on unaudited financial results of the Company for the quarter ended July 24, 2020.

Please take the same on record.

Thank you,

Yours faithfully,
For **Welspun India Limited****Shashikant Thorat**
Company Secretary
FCS – 6505**Enclosed: Results Presentation as mentioned above****Welspun India Limited**Welspun House, 6th Floor, Kamala City, Senapati Bapat Marg, Lower Parel (West), Mumbai 400 013, India.
T : +91 22 6613 6000 / 2490 8000 F : +91 22 2490 8020 / 2490 8021
E-mail : companysecretary_wil@welspun.com Website : www.welspunindia.comRegistered Address: Welspun City, Village Versamedi, Taluka Anjar, District Kutch, Gujarat 370 110, India.
T : +91 2836 661 111 F : +91 2836 279 010Works: Survey No. 76, Village Morai, Vapi, District Valsad, Gujarat 396 191, India.
T : +91 260 2437437 F : +91 260 22437088

Corporate Identity Number: L17110GJ1985PLCO33271



WELSPUN INDIA LTD Investor Presentation July 2020



BRING HOME THE SUPERPOWERS OF



Bamboo Charcoal™

With
Anti-Microbial
Properties

Benefits of #NotYourRegular Bamboo Charcoal Home Linen

Sleep mode
made healthier
Lifelong Antimicrobial

Keeps you glued
to the bed
Softness and comfort

Laze away for days
without a wash
Freshness stays intact



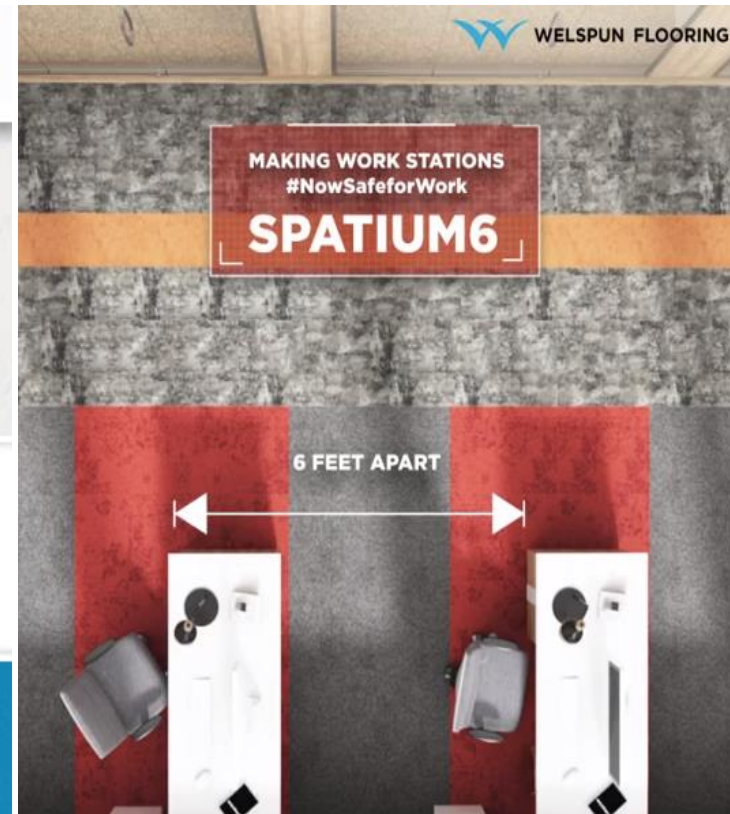
#TheNewWe



DISPOSABLE COVERALL
80 GSM : PV SPUNLACE NON-WOVEN + PE FILM

-SOFT, LIGHTWEIGHT, SWEAT-ABSORBENT SPUNLACE NON-WOVEN FABRIC
-POLYMER BARRIER COATING TO PROTECT THE WEARER FROM HAZARDOUS PARTICLES & LIQUID SPLASHES

WELSPUN FLOORING



MAKING WORK STATIONS
#NowSafeForWork

SPATIUM6

6 FEET APART

Response to COVID-19

WELSPUN



Digital QR Code

Swiftly restarting our operations with all safety protocols

Advantages of our vertically integrated facilities

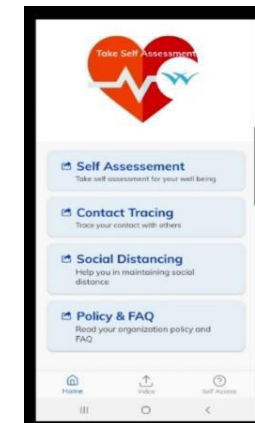
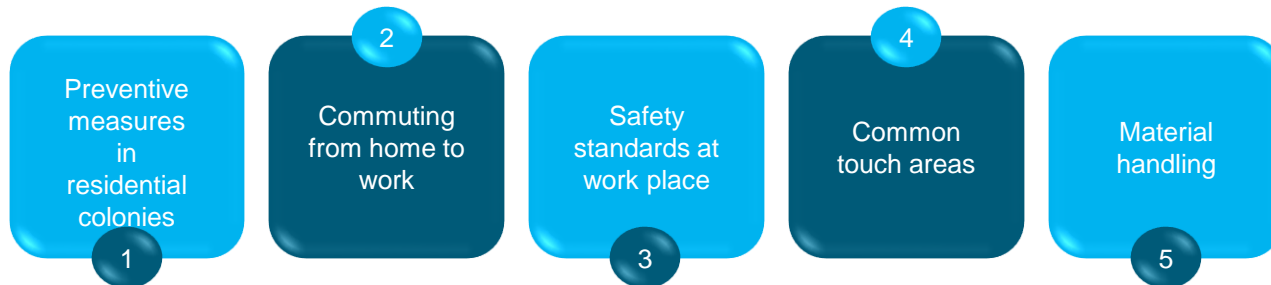
- Vertically integrated / Composite mill
- Worker's colony in factory vicinity
- Cotton warehouse – coverage for 6 months
- Ancillary units in same premises
- Location close to the ports

Taking care of Health and Safety of workforce



- Provision of all the essential items and PPE's
- Nutritious food and immunity booster drinks

24*7 well equipped medical centres



WelHeal App
(Testing, Tracing, Treatment)



Project Saksham
Connecting with associates families in Bihar, Jharkhand

Using technology to change behavior

Keeping extended Welspun family & neighbourhood Safe, Healthy and Motivated

Medical services for Welspun employees, their families & neighbourhood



AI based robotic consultancy, virtually connecting with specialist doctor



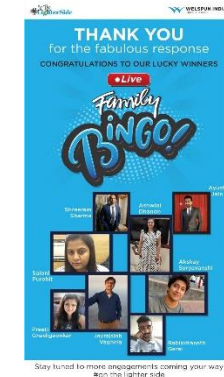
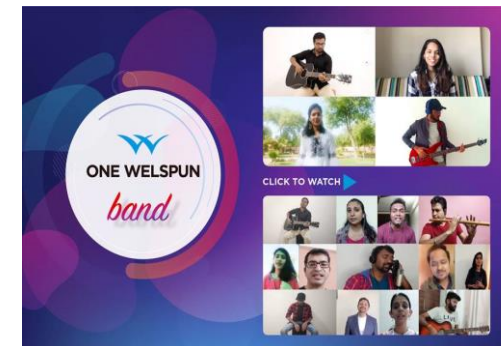
Hospital tie ups, COVID Committee, Awareness drives



Arrangement of 100+ Isolation Wards & Quarantine homes



Virtual Health, Wellness, Family Engagement, Digital Learning programs



Q1 FY21 Financial Performance

WELSPUN



Key Highlights - Q1 FY21

1st company in India to get **BIS** quality certification for the **disposable coverall**

Domestic **E-Commerce** business grew by **29% YoY** & global E-commerce business grew by **100%+**

Spaces.com doubled its sales YoY and **Christy E-Commerce** grew by **70%+ YoY**

Spaces becomes one of the the top online brands on Myntra in Home category

Strategic arrangement with one of largest US distributor, **50%** capacity of **Hard flooring** secured

'Women of Influence' award from Home Textiles Today, USA

Welspun won the **'Home Private Brands Supplier of the Year'** award from Walmart

Core business EBITDA Margin at **22.1%**, steady YoY

Core business **Net Debt** reduced by **Rs. 3,485 mn**



Financial Performance - Q1 FY21

(Rs. Million)

Particulars	Q1 FY21	Q1 FY20	YoY Change	Q4 FY20	QoQ Change	FY20	FY19	YoY Change
Total Income	12,160	17,363	(30.0%)	16,645	(26.9%)	68,362	66,084	3.4%
EBITDA	2,381	3,712	(35.9%)	2,963	(19.6%)	13,098	11,467	14.2%
EBITDA Margin (%)	19.6%	21.4%	(180 bps)	17.8%	178 bps	19.2%	17.4%	181 bps
Finance Cost	412	374	10.3%	612	(32.7%)	1,777	1,593	11.6%
Depreciation	1,106	1,094	1.1%	1,247	(11.3%)	4,811	4,358	10.4%
PBT (Before exceptional)	863	2,244	(61.5%)	1,103	(21.8%)	6,510	5,516	18.0%
Exceptional Items [^]	-	-	-	-	-	434	(2,647)	
PAT (After Minority Interest)	491	1,500	(67.3%)	856	(42.7%)	5,074	2,098	141.8%
Cash Profit*	1,648	2,746	(40.0%)	1,960	(15.9%)	9,702	8,977	8.1%
EPS (Rs.)	0.49	1.49	(67.3%)	0.85	(42.7%)	5.05	2.09	141.8%

Note:

1. [^]FY20 Exceptional Item: Rs. 434 mn (Reversal of excess provision related to provenance)
2. *Cash Profit = PBDT (before exceptionals) less Current Tax
3. Prior period figures are restated wherever necessary

Segment Results - Q1 FY21

(Rs. Million)

Particulars	Q1 FY21	Q1 FY20	YoY Change	Q4 FY20	QoQ Change	FY20	FY19	YoY Change
Home Textile								
Revenue	11,846	17,178	(31.0%)	15,845	(25.2%)	66,633	65,137	2.3%
EBITDA	2,613	3,795	(31.1%)	3,767	(30.6%)	14,692	11,278	30.3%
EBITDA Margin (%)	22.1%	22.1%	(3 bps)	23.8%	(172 bps)	22.0%	17.3%	474 bps
Flooring								
Revenue	254	104	144.1%	421	(39.7%)	872	131	564.4%
EBITDA	(273)	(86)	-	(597)	-	(1423)	(275)	-

Note:

1. Prior period figures are restated wherever necessary

Financial Performance Trend

(Rs. Million)

Particulars	FY17	FY18	FY19	FY20	Q1 FY21
Total Income	67,211	61,318	66,084	68,362	12,160
Growth %	11.8%	-8.8%	7.8%	3.4%	(30.0%)
EBITDA	16,639	12,046	11,467	13,098	2,381
EBITDA Margin	24.8%	19.6%	17.4%	19.2%	19.6%
Depreciation	5,054	5,042	4,358	4,811	1,106
Finance cost	1,583	1,408	1,593	1,777	412
PBT (Before exceptional)	10,003	5,597	5,516	6,510	863
Exceptional Items	(4,648)	-	(2,647)	434	-
PAT (After Minority Interest)	3,576	3,850	2,098	5,074	491
Cash Profit*	9,131	9,413	8,977	9,702	1,648
EPS (Rs.)	3.56	3.83	2.09	5.05	0.49

Note:

1. *Cash Profit = PBDT (Before exceptionals) less Current Tax

Balance Sheet Trend

(Rs. Million)

Particulars	31-Mar-17	31-Mar-18	31-Mar-19	31-Mar-20	30-June-20
Net Worth	23,971	26,057	27,793	29,721	30,698
Short Term Loans	11,721	12,580	14,080	17,717	16,315
Long Term Loans	21,393	20,228	19,024	16,704	9,368
of which Flooring Debt	-	-	2,870	6,378	6,774
Gross Debt	33,114	32,807	33,104	34,421	32,457
Cash & Cash Equiv.	2,725	2,538	2,821	4,803	5,928
Net Debt	30,389	30,269	30,283	29,618	26,529
Net Debt excluding Flooring debt	30,389	30,269	27,412	23,240	19,755
Capital Employed*	61,259	62,962	65,456	68,825	68,298
Net Fixed Assets (incl CWIP)^	35,713	33,641	36,154	38,105	38,347
Net Current Assets	20,114	23,734	22,210	21,828	19,781
Total Assets	73,283	72,249	77,423	83,103	82,502

Core business Net Debt reduced by Rs. 10,514 mn from 31st March 18

*Capital Employed = Net worth + Gross Debt + Other long term liabilities | ^Net current assets does not include Cash & cash equivalents

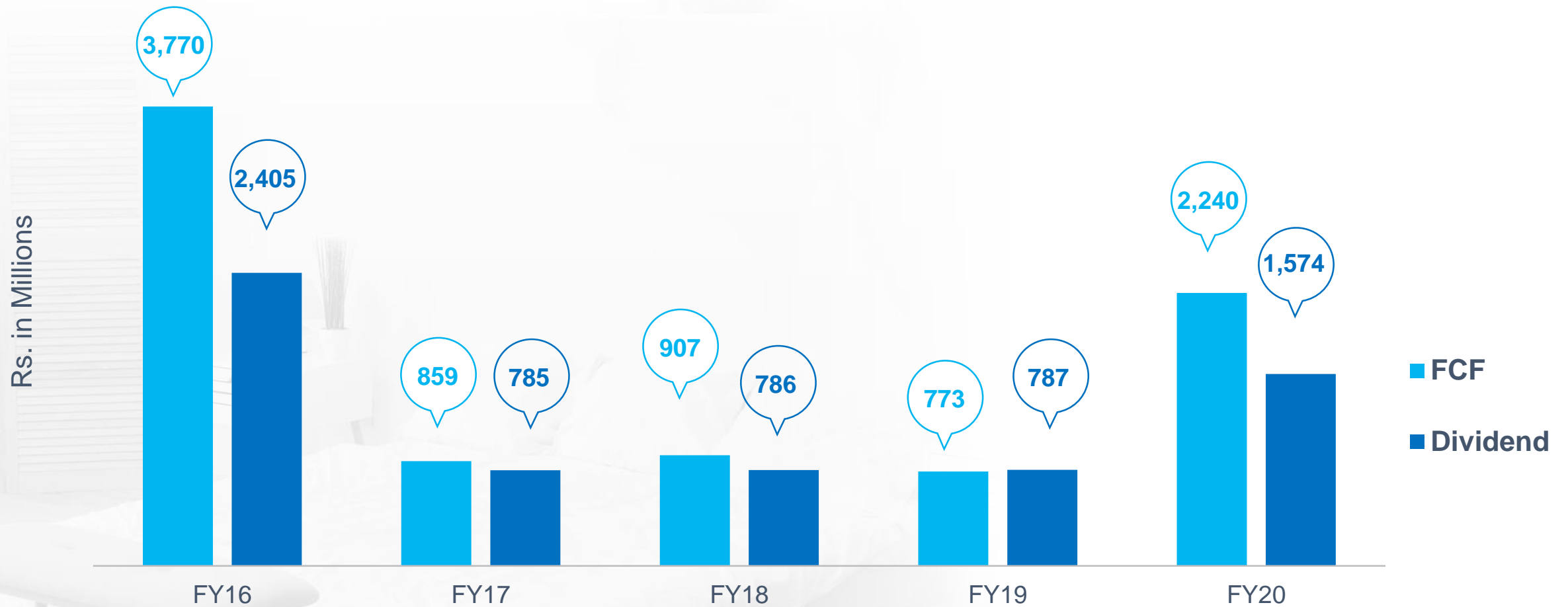
Financial Ratio Trend

		FY17	FY18	FY19	FY20	TTM
Solvency ratios	Net Debt/Equity	1.27	1.16	1.09	1.00	0.86
	Net Debt/EBITDA	1.83	2.51	2.64	2.26	2.25
	EBIT/Interest	7.32	4.98	4.46	4.66	3.83
Operational ratios	Current ratio	1.41	1.42	1.25	1.19	1.22
	Fixed asset turnover	1.86	1.80	1.81	1.77	1.62
	Total asset turnover	0.91	0.84	0.84	0.81	0.75
	Inventory days	70	79	75	83	87
	Debtor days	53	56	60	59	57
	Payable days	41	39	39	49	53
	Cash conversion cycle	82	96	95	93	91
Return ratios	ROE	29.6%	15.4%	15.2%	16.1%	12.1%
	ROCE (Pre-tax)	19.3%	11.3%	10.9%	12.3%	10.3%

Continuous Improvement in Net Debt/Equity

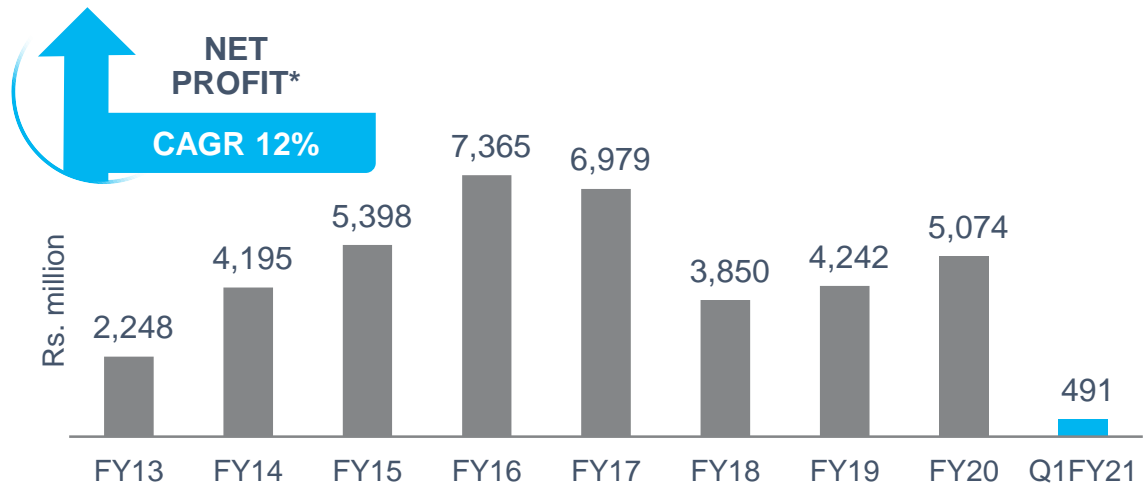
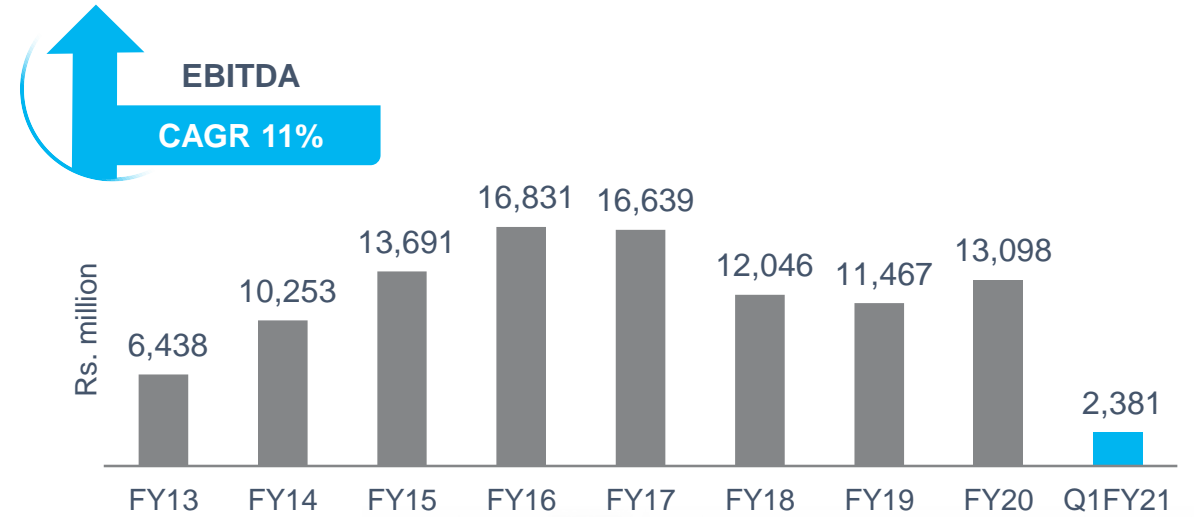
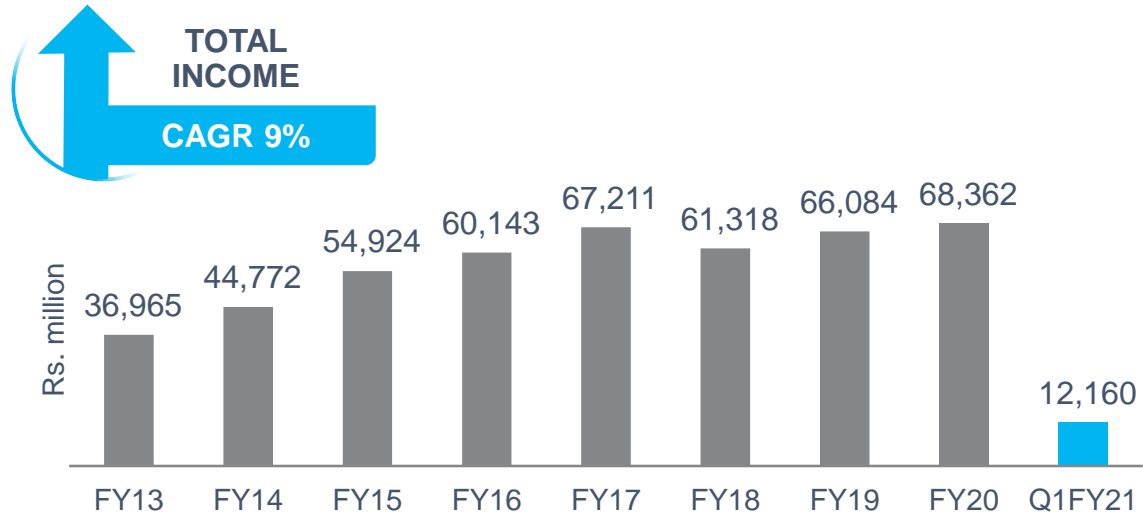
1. ROCE = EBIT / Average Capital Employed & ROE = Net Profit / Average Net worth
2. ROCE (pre-tax) excluding Welspun Flooring is 13.9% for FY20 & 11.9% on TTM basis
3. Total asset turnover = Sales/ (Fixed assets + Gross current assets)
4. FY17, FY19 & FY20 Return Ratios figures adjusted for Exceptional item
5. TTM ROE adjusted for Exceptional item & tax

Focus on Free Cash Flow



FCF positive and utilized for dividend payout

Trend of Financial Performance



*Net Profit for FY17 & FY19 is adjusted for exceptional items | CAGR is based on FY13-FY20

Dividend Policy



Board approved dividend distribution policy

25% of Standalone PAT to be the total payout
(incl. dividend tax if any)



Consistent track record of dividend distribution

Period	Standalone EPS	DPS	Dividend Tax Per Share	Payout Percentage
FY15	5.09	1.05	0.21	25%
FY16	5.99	1.30	0.26	26%
FY17	3.05	0.65	0.13	26%
FY18	3.03	0.65	0.13	26%
FY19	1.41	0.30	0.06	26%
FY20	4.73	1.00	0.20	25%

Capital Allocation Strategy

It has been our endeavor to allocate capital efficiently in order to enhance stakeholder value. Hence over the last few years our net debt has reduced, even though we have added capacities in various businesses, including our investment in the flooring business.

Our strategy on **capital allocation** is to:

- ✓ Calibrate our capex based on the cash flow available; and keep it around the total depreciation charge
- ✓ Maintain a steady dividend distribution of at least 25% of standalone profit
- ✓ Continue to invest in our brands across geographies and channels
- ✓ Continued focus on reduction of Net Debt; we have already reduced net debt in our core business by Rs 1,000 crore over the last 2 years and would continue to allocate capital towards net debt reduction

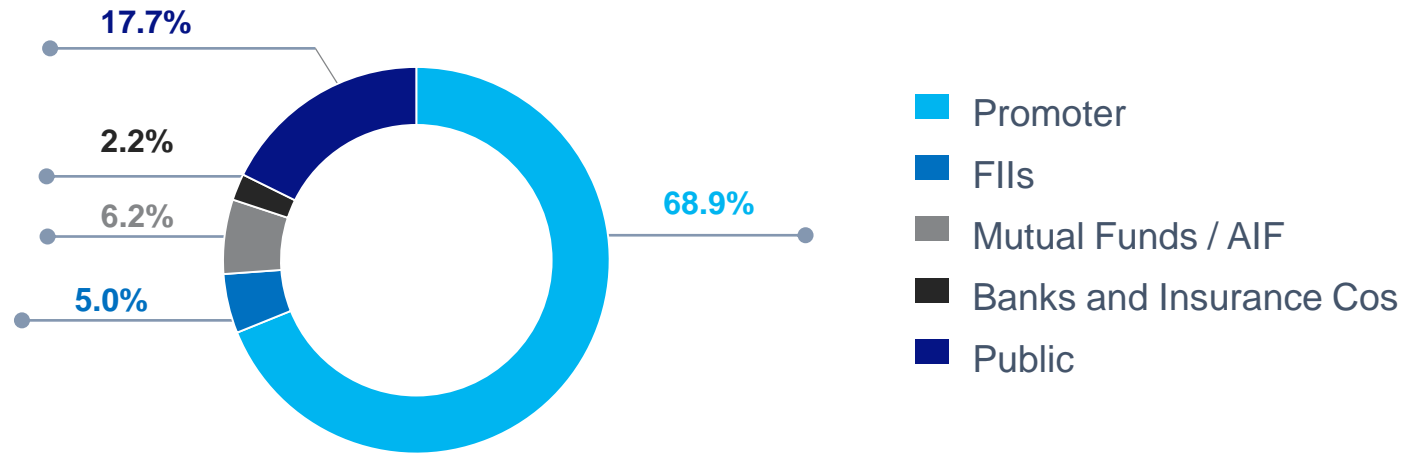
Any capital we are allocating, is after a comprehensive discussion and exercise which is supervised by the board. Any capital invested is with view to grow with a significantly higher margin than the current average margins.

Shareholding and Trading Snapshot



Shareholding Pattern

As on June 30, 2020



Market Statistics

As on July 23, 2020

	INR	USD
Price per share	34.35	0.46
No of shares outstanding (Mn)		1,005
Market capitalization (Mn)	34,512	462
Daily average trading Volumes (Q1 FY21) (Mn)		0.97
Daily average trading Value (Q1 FY21) (Mn)	29.25	0.39

Source: BSE & NSE

Corporate Overview

WELSPUN



Digital QR Code

Welspun Group - Global Conglomerate



WELSPUN INDIA
HOME TEXTILES

**Global Leader
in Home
Textiles**

WELSPUN CORP
PIPES AND PLATES

**Global Leader
in Large
Diameter Pipes**



WELSPUN ENTERPRISES
INFRASTRUCTURE AND ENERGY

**Infrastructure,
Investments in
Oil & Gas**

WELSPUN ONE
Logistics Parks

**Leading
Warehousing
player**



Group Revenue
US\$ 2.7 Billion



Fixed Asset Base
US\$ 1.1 Billion



Net Debt / EBITDA
0.8 x



Employees
25,000+

WELSPUN



\$1 Bn

Global Home
Textile leader



Vertically Integrated Facilities

Presence in **50+ countries**
with DC's in North America,
Europe and Asia

Thought leader
in Home

30 Patents



Trusted Partner

Preferred Supplier to
Top Global Retail giants &
Hospitality players



Ranked #1

Among Home Textile
Suppliers to USA
5 Times in
Last 6 Years*

* Source: HTT Magazine

A Certified
**Woman Owned
Business**

**35+ Years
History**



Diversified **Brand
Portfolio**



**Socially Responsible,
Sustainability-focused**

**1 in 5
Towels**

**1 in 9
Sheets**

Sold in the US**

** Source: OTEXA data

WELSPUN2.0

1



Innovation

2



Brands

3



Sustainability

4



New Channels /
Markets

5



New Products

Increasing Share of Innovative Products



41%
of Sales from
Innovative
Products



30
unique inventions
filed globally



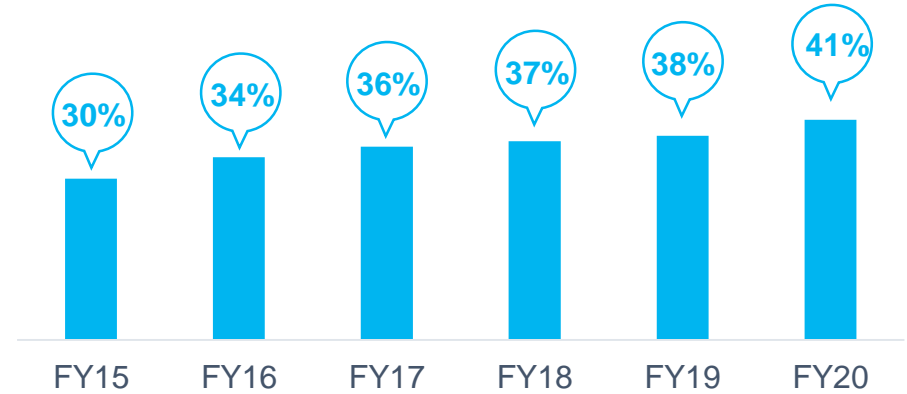
- 15 successful years of Hygro Cotton
- Contributing \$1bn in FOB sales
- Gaining traction in hospitality & domestic market



- Patented construction provides superior allergy protection



- Patented traceability solution, constitutes 3% of total revenue



Innovative products account for **41% of revenue (FY20)**



**Global Collaboration
on Innovation**



Top Universities



Technology Partners



Industry Associations



HYGROCOTTON®

Regulates temperature for individual comfort

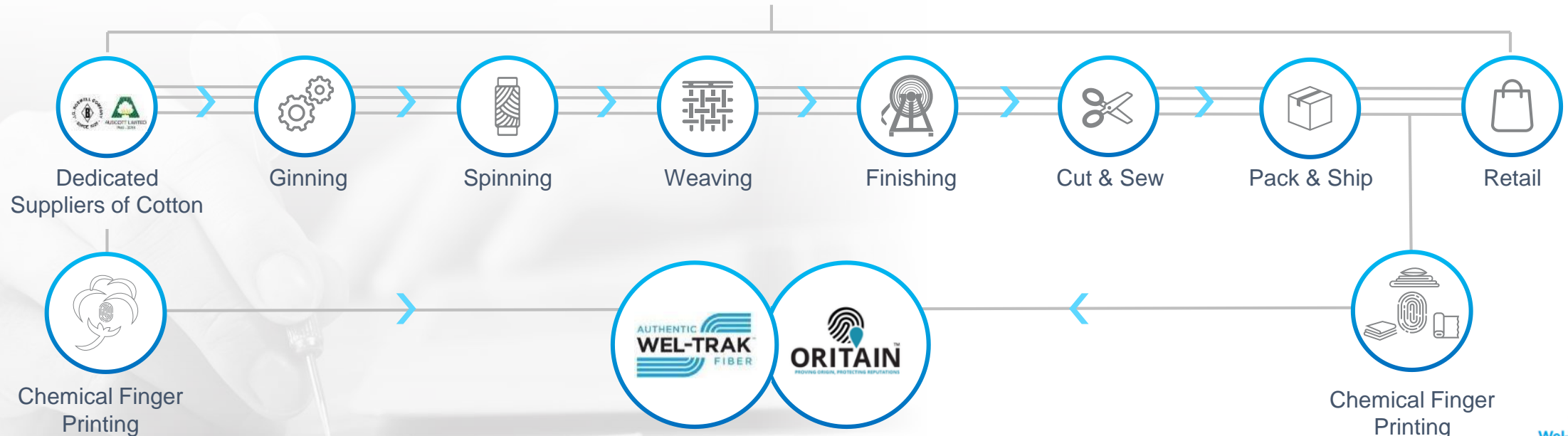
Before washing After 3 washings



WEL-TRAK : Patented Global Cotton Integrity Solution



Welspun's patented Wel-Trak[®] process, supplemented by scientific traceability from Oritain[™] is now the industry defining end-to-end fiber tracking process



Seal of Authenticity of Origin

Traceability Like No Other

Visit Wel-Trak.com



Verifies fiber from the origin and at every stage of production

Ensures rigorous process control of fiber's physical parameters

Authenticates cotton from dedicated sources

Assures independent third-party testing

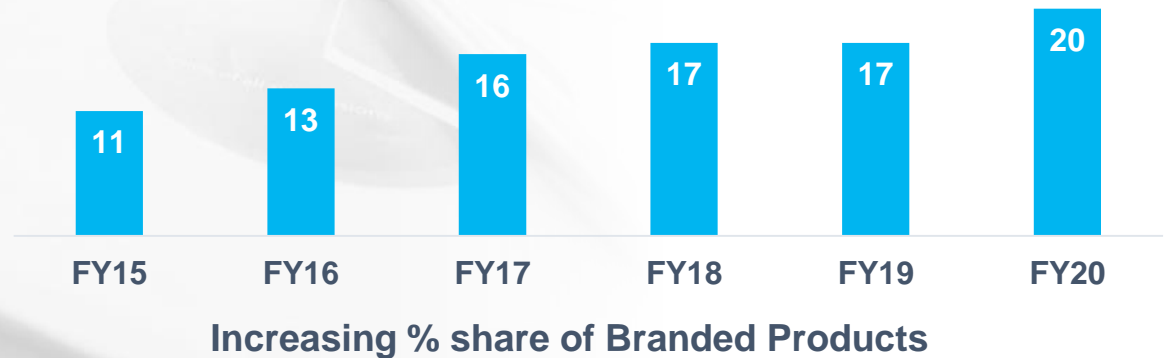
Allows consumers to track fiber in product back to the farm where it was produced

Diversified Brand & Licensed Portfolio

	India	UK/Europe	North America	Online
	Dual Brand Strategy	Christy as Digital brand	WellivingHome BY WELSPUN	WELHOME™
Own	 	 	 	Sustainability & Empowerment
Licenses	 		 	Innovations
	Branded products contributed to ~ 20% revenues in FY20			

Global Brand Strategy

- Grow B2C & B2B2C business - online & offline
- Invest in building/acquiring relevant brands/licenses
- Build customer stickiness & tap global sourcing



Premium Brand: Spaces



Focus on Tapping Domestic Market Potential

India – One of the fastest growing economies in the world with huge potential for increasing organized market

2000+ Outlets across 350 Cities & Towns

Presence in 200+ shop-in-shops



- Spaces is 2nd most famous brand in premium category
- Spaces continues to be No 1 in shop-in-shops
- 'Spaces' was recognized as best brand in home category by Myntra.
- Amazon Marketing Services Award for Spaces.

Unique campaign called #SafeSPACES to make people feel comfortable and at peace in their homes amid COVID-19



Licenses for Domestic Market



Brand Strategy

Use of 360 degree marketing approach by increasing customer touch points including social media, POS, in-store, PR news, TV, outdoor, radio, customer service.

Spaces brand campaign



Aiming to be “Har Ghar Welspun”

Campaign starring **Amitabh Bachchan**



‘Welspun’ brand has catapulted to 2nd position in value segment*

https://www.youtube.com/watch?v=_aVUdYzpPog

Outdoor Advertising



Festive Campaigns

Towel Hygiene Campaign
Educating people about personal hygiene & role of towel



https://www.youtube.com/watch?v=1F_pdoX_0-Q

Reaching Larger Audience → 2500+ Outlets across 50 Cities



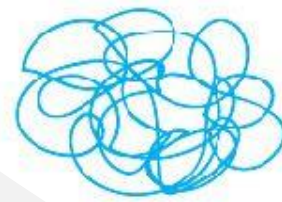
2,500 +
strong and
growing daily



Real-time “chat” on a social media-like platform, with results segmented across various demographics

FAMILY-FIRST CONNECTION.

Welspun is creating and maintaining a community that we interact with regularly to help guide our decision-making with regard to product development, consumer marketing and retailer assortments.



the welspun
brain trust

Leveraging consumer insights to accelerate innovation

Sustainability woven in Value Chain

Sourcing of Raw Materials



Sustainable Sourcing
Farming Projects



Organic Cotton



Recycled Cotton



Manufacturing Process



Zero Fresh Water Usage
Green Cover



Recycling / Upcycling



PRODUCTS & OFFERINGS

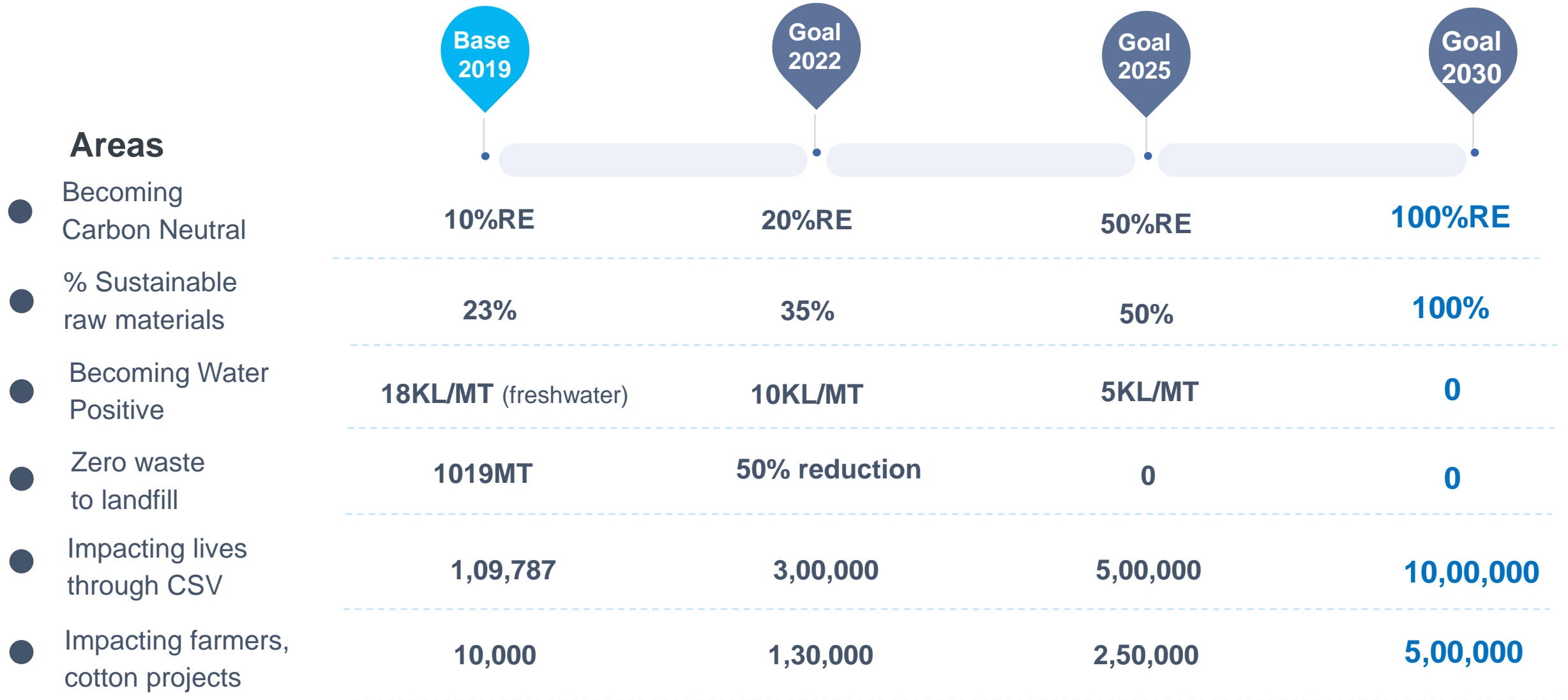
Ancillarisation
Reducing Carbon Footprint

Supply Chain & Packaging



Weaving Sustainability in all aspects of the Value chain

Sustainability Targets



Inclusive Growth: Corporate Social Value



Environment & health



Building Model Villages
Sustainable business practices, clean water, improved sanitation and development of green spaces within the communities

Education



Our initiative to improve the quality of education at schools serves over **160+ schools**, **~317 digital Classroom**, **1300+ teachers** and **65,000+ students** in Gujarat

Empowerment



Welspun 2.0, spun centers, smart villages are empowering the women in Gujarat to lead the way to economic independence and growth. **450+ Women Entrepreneurs** across **205 Villages**

Supporting Sportswomen



250+ Medals won through Welspun Super Sports across 11 different sports. Partnership with sports agency – Meraki Sports **26 Athletes** across India

Emerging Business: Flooring Solutions

Wide range of flooring products



Carpet tiles



Broadloom carpets



Click n Lock tiles



Artificial grass

Welspun Flooring
Only company to
manufacture both Hard &
Soft Flooring under one roof

Vertically integrated
company

LEED Gold
certified

In-house
Design lab



One day flooring with company provided expert installation

- Facility located in Telangana
- Investment of **~Rs. 8.8 billion**
- Ongoing Digital transformation at breakneck speed with upcoming tools such as **Virtual retailing tour** experience, **Online Design studio**, interactive e-catalogs etc.
- 50 distributors and **~500 dealers** have been appointed so far pan-India
- Aim to become leading one-stop Flooring solution provider in Domestic & Global markets

Emerging Business: Advanced Textile

Spunlace

Cater to medical disposables, hygiene and cosmetic applications

Successfully tested for manufacturing Aerospace cleaning material



Wet wipes

Tailor made for end applications like Baby Care, Personal Hygiene, Cosmetics, & Home-care

“Made in India” products range gaining traction globally

Needlepunch

Applications like Air filtration, EAF (Engine air filter), liquid filtration- Industrial oil, fuel, food & beverage, paint, pharma etc.

Products include specialized features such as fire retardants, anti-bacterial, PET resistant, among others



Technology →

Hydro Entanglement

Thermo bonding

Needlepunch

Markets →

Automotive

Protective

Filtration

Coating Substrates

Personal Hygiene

Health & Hygiene foray



- Leveraging integrated capabilities in woven & non-woven fabrics
- National and international certifications on Facilities & Products
- Product range : Masks, coveralls, wipes, disposable linen
- 1st company in India to get BIS quality certification for the disposable coverall
- Current Capacity: Daily > 250,000 Masks and 10,000 Coveralls
- Catering to business requirements both within India and exports

#TheNewWe

WELSPUN HEALTH

IS - 17423 : 2020

CM/L 7600131808

SAFETY, QUALITY AND RELIABILITY CERTIFIED.

WELSPUN BECOMES THE FIRST COMPANY IN INDIA TO RECEIVE BIS CERTIFICATION FOR DISPOSABLE COVERALL.



Textile capacity for making Personal Protection products



Anti-Viral Textiles

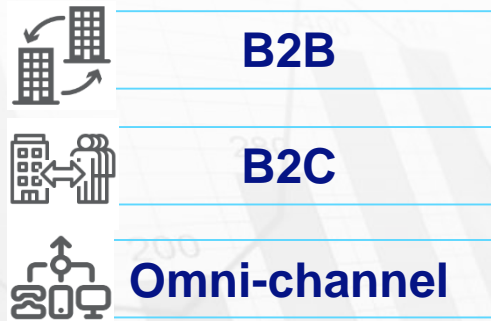


Partnership with HealthGuard corporation, Australia



Ecommerce - Multipronged strategy to drive growth

Presence across the spectrum



Brand Play

- ❖ Private Label
- ❖ White Label
- ❖ Branded
- ❖ Hospitality



Choice Play



- Channels
- Categories & Brands
- Target Consumers

Strategic Levers



- Balanced Portfolio mix
- Partnerships
- Profitability – Margins



Supported by
Core Capability

Digital marketing

Supply chain

Data Analytics

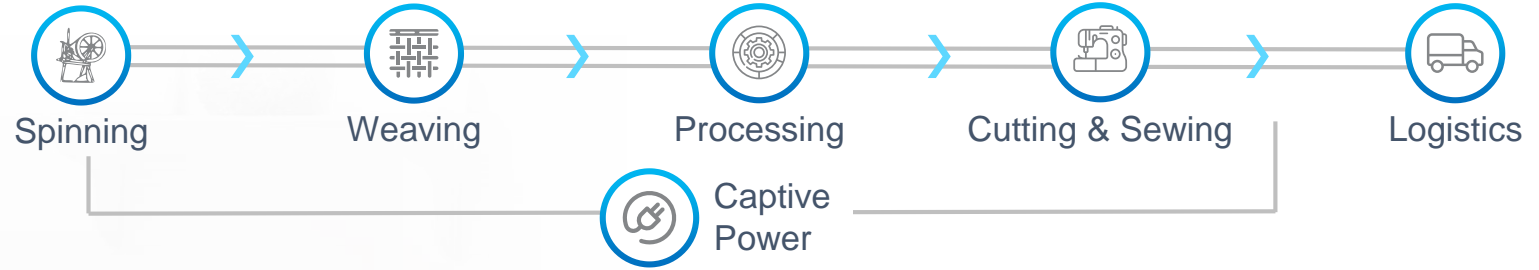
Vertically Integrated Presence with Significant Capabilities

India Supply Advantage

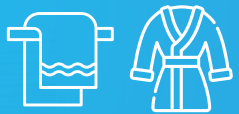


Cotton

Vertically Integrated Facilities Across Manufacturing Chain



Current integration of about **70%** in Spinning and Weaving



Towels,
Bath Robe



Sheets, TOB,
Utility & Fashion Bedding



Carpets, Rugs,
Flooring Solutions



	Towel (‘000MT)	Bed Linens (‘Mn mtrs)	Rugs & Carpets (‘Mn sq. mtrs)
Capacities	80	90	10
FY20 Effective Utilization	84%	74%	78%

Global Distribution Network with Marquee Clients



Delivery and Reach in Over 50 Countries

Awards & Accolades - Testimony to Excellence



Experienced Board & Management with Proven Track Record



Board of Directors

B. K. Goenka, Chairman

- Amongst India's most dynamic businessmen
- Past President ASSOCHAM (2019)
- Recipient of Asian Business Leadership (ABLF) Award, 2019

Arun Tadarwal, Independent Director, Audit Committee Chairman

- **20+ years** of experience in Finance, Audit, Taxation and Quality Management. Member of ICAI, practicing since 1981

Ms. Anisha Motwani, Independent Director

- **28+ years** experience in advertising, auto-manufacturing, financial and health services. Currently advisor to World Bank. Voted among '50 Most Powerful Women in Indian Business' by Business Today for 3 consecutive years

Pradeep Poddar, Independent Director

- Technocrat & Corporate Leader with **30+ years** of experience in consumer products industry and vast experience in brand building

Arvind Singhal, Independent Director

- MBA from University of California, founded Technopak, India's leading management & operations consulting firm with focus on Textiles, Retail, Healthcare etc



Management Team

Rajesh Mandawewala, Managing Director; Member of Board

- Qualified Chartered Accountant; Played an instrumental role in establishing Welspun's Textile & Pipe business
- Leading new strategic initiatives of the Group

Ms. Dipali Goenka, CEO & Joint Managing Director; Member of Board

- Driving force behind textile business, successfully led development of two brands – SPACES and Welhome
- Graduate in Psychology & completed Management Program from Harvard

Sanjeev Sancheti, CFO (Welspun India)

- **29+ years** of experience in corporate finance, accounts and strategy
- Was with SREI as Chief Strategy Officer for 12 years before joining Welspun

Ms. Nemisha Ghia, CEO (Retail)

- **18 years+** of diverse experience across E Commerce, FMCG & Telecom
- Worked with Swiggy, Amazon, Mondelez, HUL, PepsiCo Fritolay, Reliance Telecom and Bharti Airtel

Cherian Thomas, CEO (Advanced Textiles)

- **24+ years** of experience across diverse functions & global functional expertise
- Worked with Essel Propack, ITW Signode, Packaging India Private India Limited, Amcor Flexibles India

Mukesh Savlani, CEO (Welspun Flooring - Exports)

- Home-grown CEO with **17+ years** experience in various roles at Welspun; Engineering graduate
- Leadership Program from Harvard

Mahesh Shah, CEO (Welspun Flooring - Domestic)

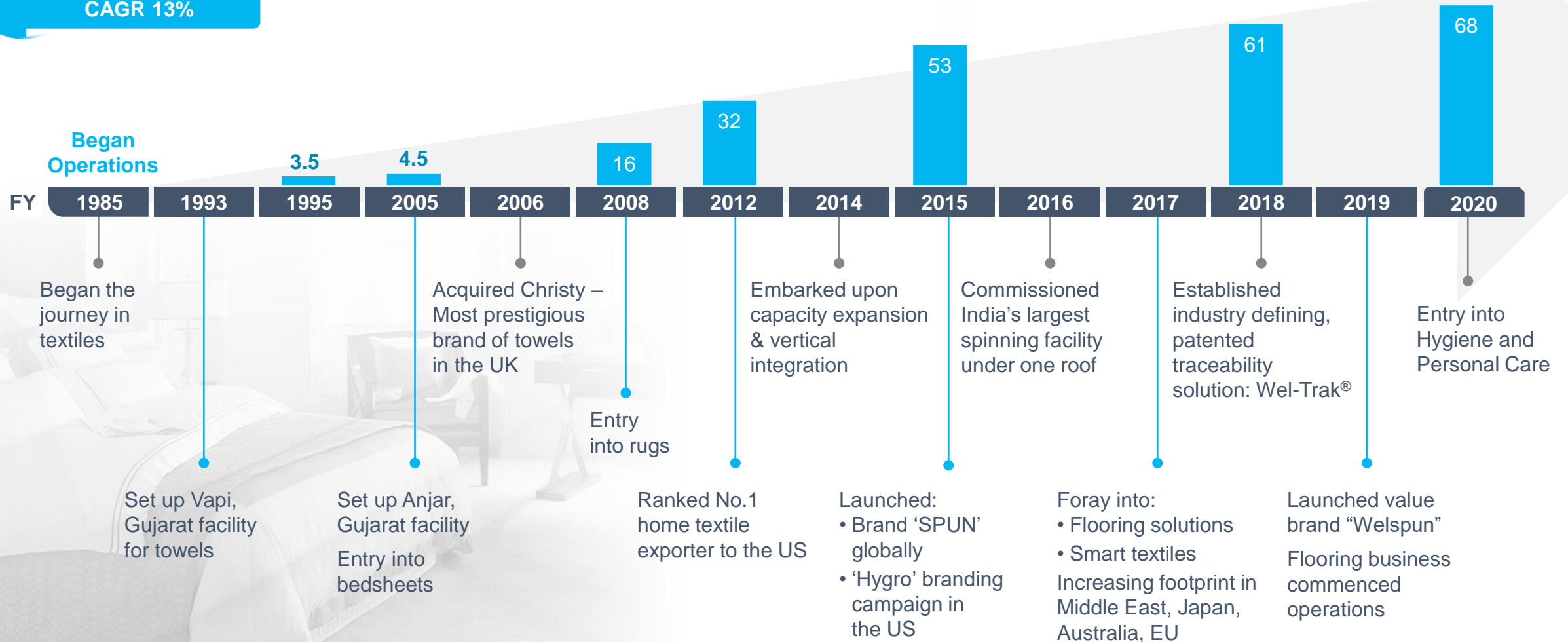
- **30+ years** of experience in Turning around businesses, Go-To- Market strategy alignment and managing large teams
- Prior experience with NITCO, Future Group, Nilkamal Retail, VIP Industries Crompton Greaves, among others

Ravi Panicker, Head (Christy)

- 26+ yrs. experience in Retail Sales, Ecommerce & Category
- Previously worked with Raymond, Bombay Dyeing among others

Key Milestones

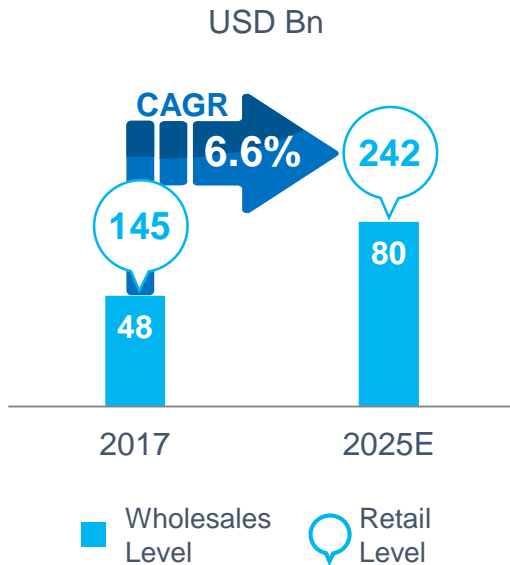
Revenue (Rs Bn)
CAGR 13%



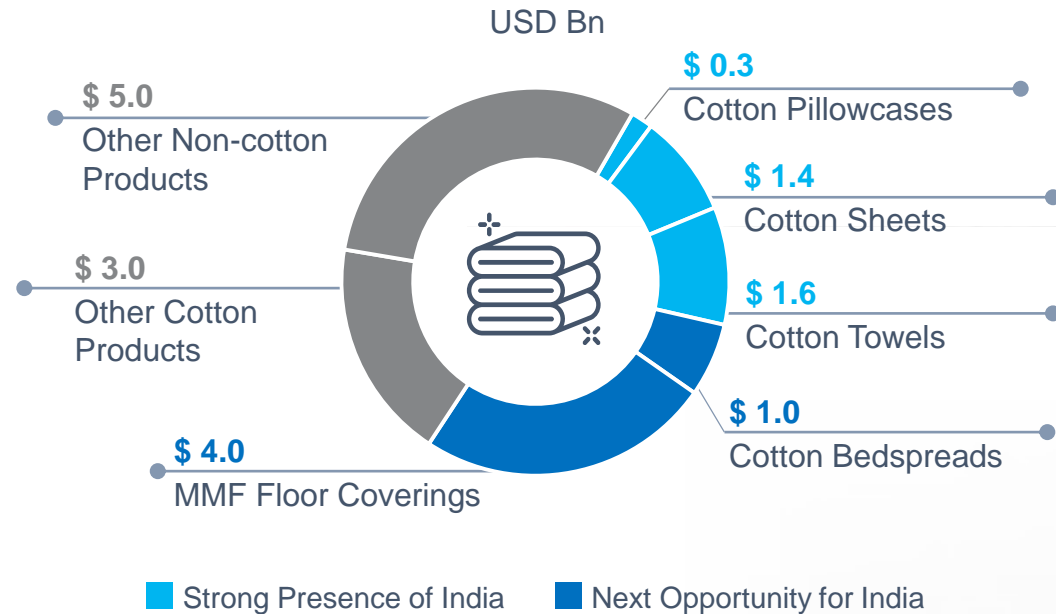
CAGR from FY08-FY20

Global Market Opportunity

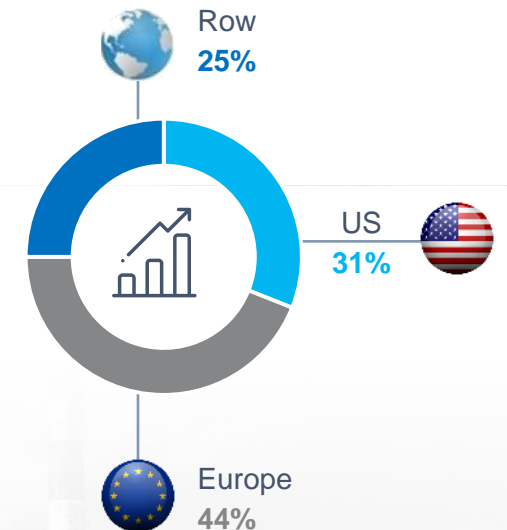
Global Home Textile Market



US Home Textile Market (2018)



Market Composition



- **US and Europe** are the major end markets comprising a **75%** of the textile market
- India players have concentrated in US because
 - US is a large and homogenous market making it a more attractive market to target first
 - While US is a level playing field, Europe provides preferential tariff rates to some competing countries

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WELSPUN



THANK YOU

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