

Before

Rejuvenate and Excite Channels

- Retail
- Wholesale
- Ecommerce

Maximize Product opportunity

- Build momentum
- rest of bottoms
- revamp top

Improve Connect with Consumer

- Campaigns
- Retail Merchandising
- DTC

Achieve operational excellence

- People excellence
- integration
- leverage digital

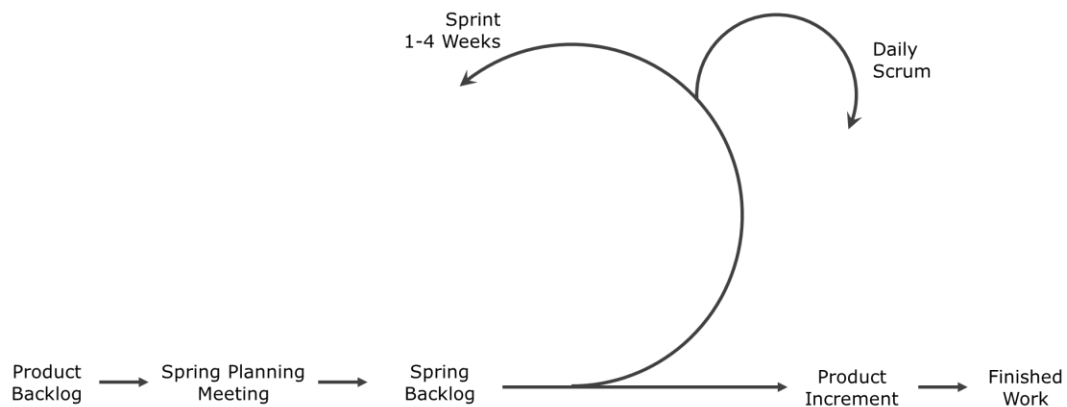
After

STRATEGIC IMPERATIVES

Scale business growth by leveraging channels, product launches, customer insights and maximizing synergies



Before



After

Scrum process PowerPoint Template



Before

VF Capabilities

Key Features in FY20



VF on Dell Rail & MX



VF on HE Synergy



Stretched Cluster
Support



Integrated
Automation



NX-T Support



Upgrade/patch
Enhancements



PKS Support



Public APIs

Customers are Driving VF Capabilities

After

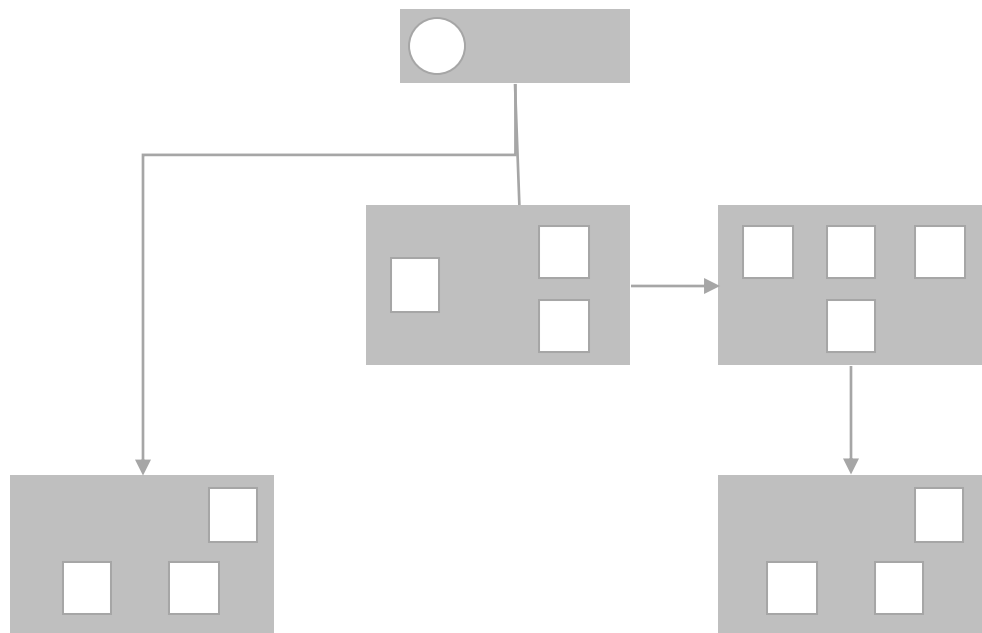
VF Capabilities

Key Features in



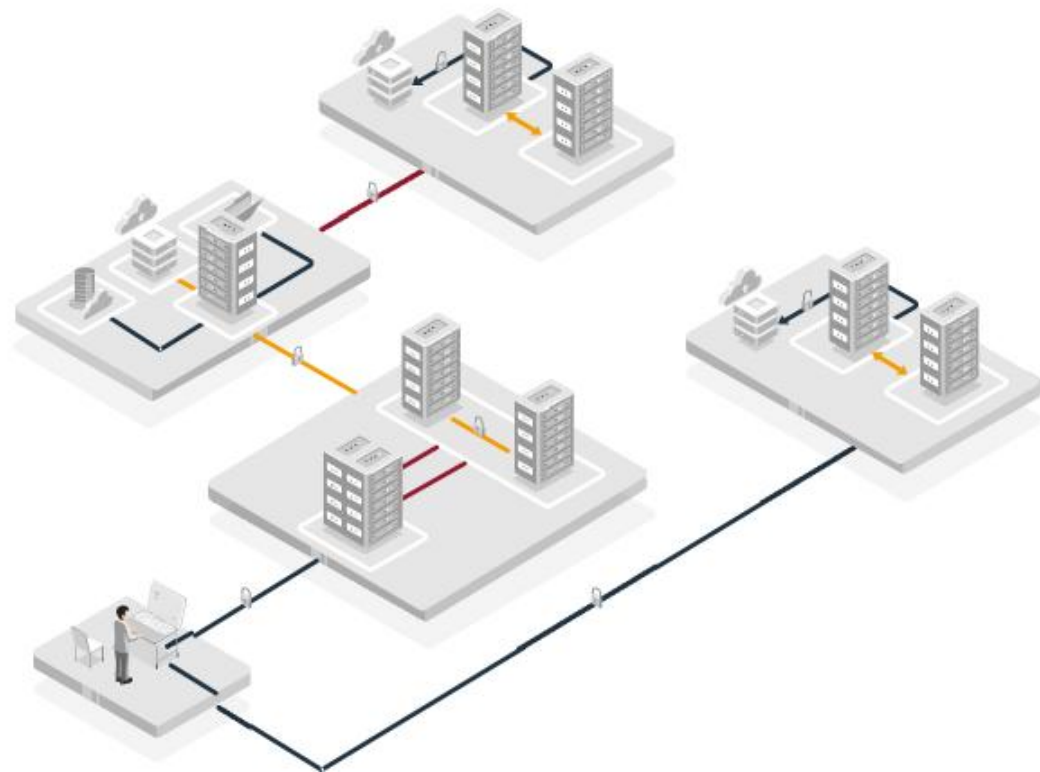
Customers are Driving VF Capabilities

Before



After

Isometric



Business Snapshot

Our Business Highlights

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Top products

- 20% Lorem ipsum dolor sit amet, consectetur
- 40% Lorem ipsum dolor sit amet, consectetur
- 50% Lorem ipsum dolor sit amet, consectetur
- 70% Lorem ipsum dolor sit amet, consectetur

Key Numbers

- Revenue: 244.2MM
- EBIT: 25.2MM
- 27 Partners
- 43 Cities

	Revenue	EBIT
Indian Terrain	96	12.8
Mills	1260	49.6
Madhu	1137	132
Shop	1002	72.2
ture	5306	257.7
Ray	396.9	51.9

Competitors performance

Business Snapshot

Business Highlights and Reach

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Our Top Products



20%
Lorem ipsum dolor sit amet,



40%
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50%
Lorem ipsum dolor sit amet,



70%
Lorem ipsum dolor sit amet,



Our Competitors



MARKET MAP

Market Segment 01

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Market Segment 02

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Target

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Main Category

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Sub Category

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Niche Category

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MARKET MAP



Market Segment 01



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V/s

Market Segment 02



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Before

Strategic Imperatives

Rejuvenate and Excite Channels

- Retail
- Wholesale
- Ecommerce
- DTC/

Maximize Product opportunity

- Build momentum on Reset of bottoms
- Reset of bottoms
- Revamp Top

Improve Connect with Consumer

- Campaigns
- Retail Merchandising

Achieve operational excellence

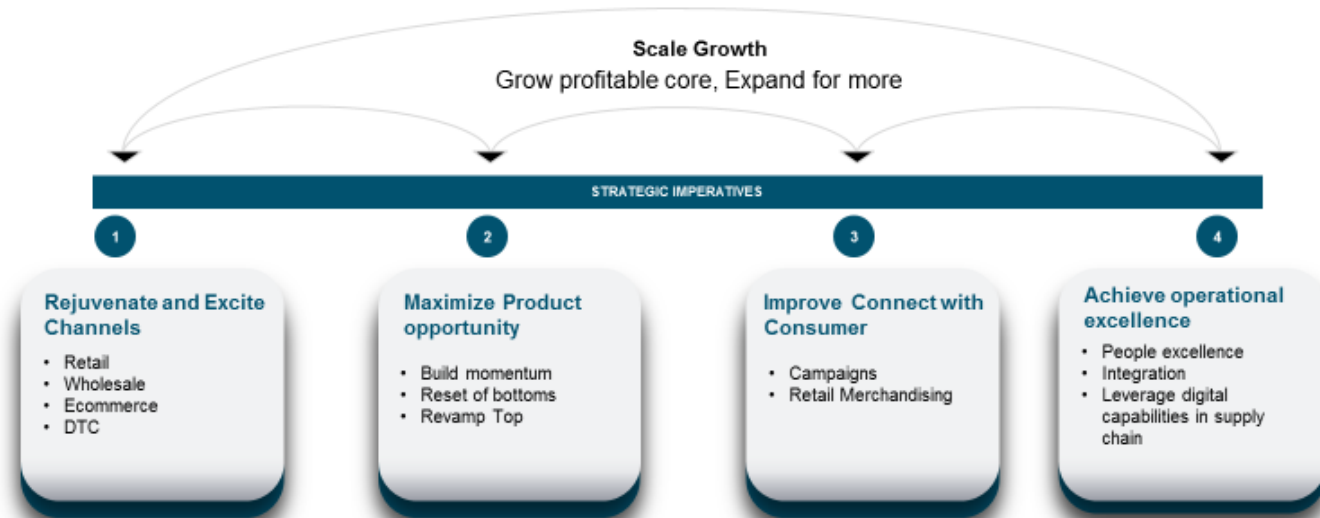
- People excellence
- Integration of
- Leverage digital capabilities in supply chain

After

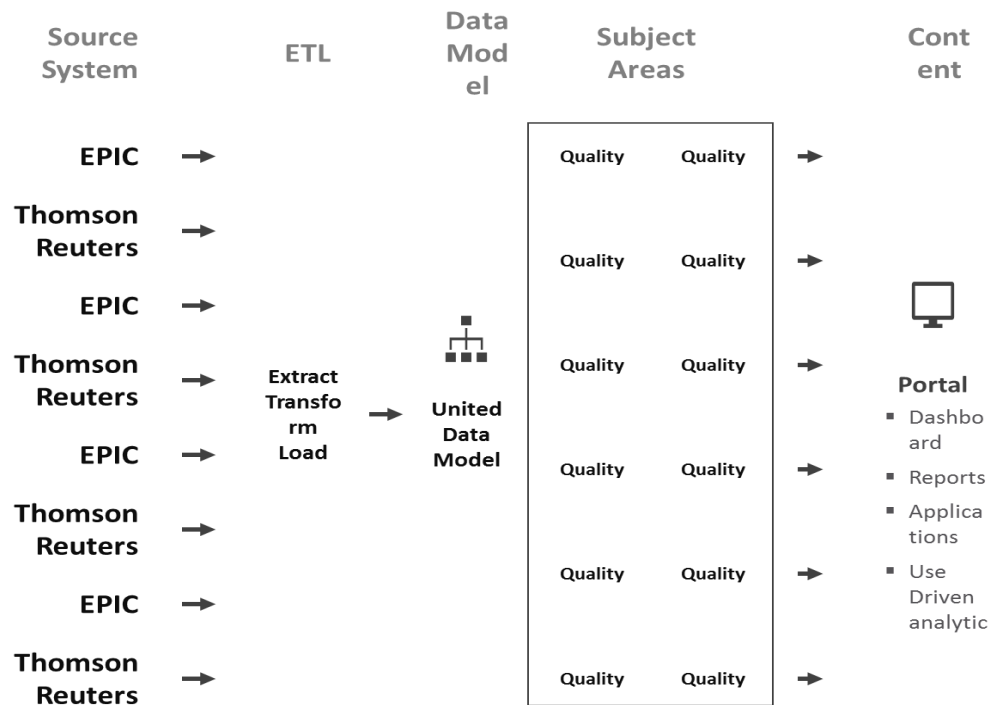
Strategic Imperatives

Overall Strategy

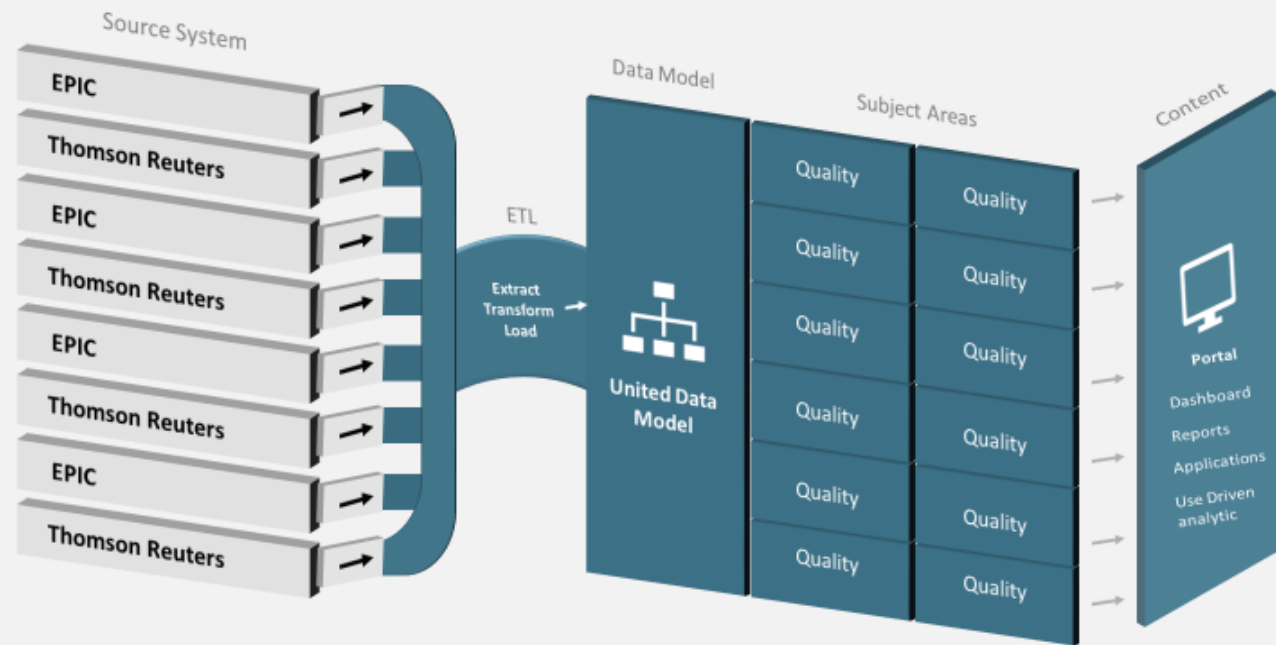
Scale business growth by leveraging channels, product launches, consumer insights and maximizing synergies



Before



After



Before

Performance Update, Retail

		V Plan	V PY	What went well?
+	Sell In Net Revenue	95%	3%	<ul style="list-style-type: none"> 25 new stores launched 15 in pipeline 35 stores renovated Avg growth of 15% post renovation 3 O&O stores launched @ 2.52 vs national avg of 2.24 Old liquidated and replaced with new line
+	Sell Out Revenue	93%	6%	Challenges
+	Sell Out Units	100%	8%	<ul style="list-style-type: none"> 2% de-growth in Non recovery of GST during impacted topline to the tune of 3% Higher discount outflow Inward issues at the onset of season launch reduced FQ contribution during Double digit de-growth during in Kerala due to floods
+	MGP Revenue	100%	21%	

After

Performance Update, Retail

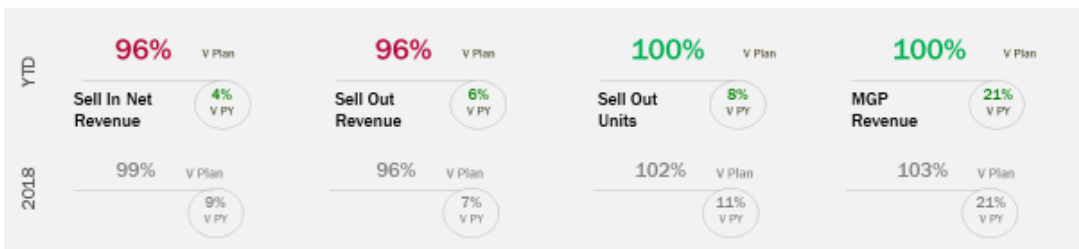


What went well?

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Challenges

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Top Priorities

- Execute
- Growth in Men's & Women's Bottoms
- model stock fill and replenishment to drive sell-out
- Launch & grow White Tab
- Achieve 5% L2L growth
- 43 store renovations planned in 2018

THE PROBLEM

- **Challenge**

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- **Solution**

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THE PROBLEM



Challenge

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Solution



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Before

Maximizing Product Opportunity

Top Priorities

- Growth in Men's Bottoms
- New & White Tab Execution
- Space Expansion
- Brand Presentation

Marketing Strategy

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USD 25 Avg MRP	44 DSO	20DSI
USD 25 Bottoms Average	34 Bottoms	50% Bottoms Mix
USD 25 Tops Average	20% Tops mix	

Key Numbers

Market Size	821 MM
5 Year CAGR	4.1%
2011 Revenue	3.8 MM
2022 Revenue	10 MM

After

Maximizing Product Opportunity

821 MM

Market Size

4.1%

5 year CAGR

3.8 MM

2011 Revenue

10 MM

2022 Revenue

Marketing Strategy

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USD 25 Avg MRP

44

DSO

20

DSI

USD 25 Bottoms Avg

34

Bottoms Nos.

50%

Bottoms Mix

USD 25 Tops Avg

20%

Tops Mix

Top Priorities

- Growth in Men's Bottoms
- New & White Tab Execution
- Space Expansion
- Brand Presentation

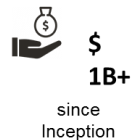
Before

Cloud Performance

Market Leader in Solution

Performance Highlights

Bookings since Inception



Bookings in 2020



Customers



Bookings Growth

Year	Series 1
FY18	1.0
FY19	2.4
FY20	3.4
FY21	7.0

7x projected growth

Customer Count

Year	Series 1
FY18	139
FY19	271
FY20	450
FY21	860

6x projected growth

Going Forward...

After

Cloud Performance

Market Leader in Solution

Performance Highlights

Bookings since Inception



Bookings in 2020



Customers



Bookings Growth

Going Forward...



Customer Count



Before

After

Human Resources Function

Our Initiatives

1. Team workshops to settle in new teams
2. SMT Leadership Journey: via Project Horizon
3. Addressing engagement & recognition needs via
4. Action plans for Gallup result
5. Making the workplace for more vibrant – slides follow
6. Developing frontline leaders across functions

Key Numbers

- Gender Ratio: 20% Female
- Geographic Split
 - Bangalore: 71%
 - East: 5%
 - North: 12%
 - South: 3%
 - West: 9%

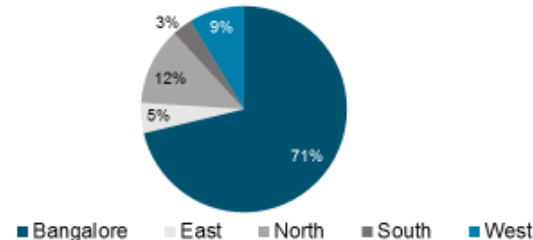
Talent Strategy

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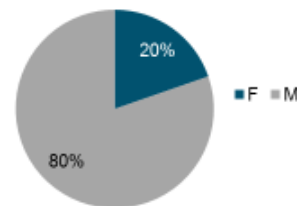
Employee	Years Spent
K Patel	23.33
HS Gupta	22.63
Hiren	9.27
Aman singh	8.11
Pankaj	6.91
Meeta shitole	4.86
Shelly vashisht	2.75
Arun kumar	2.69

Human Resources Function

Region Wise Distribution of Employees



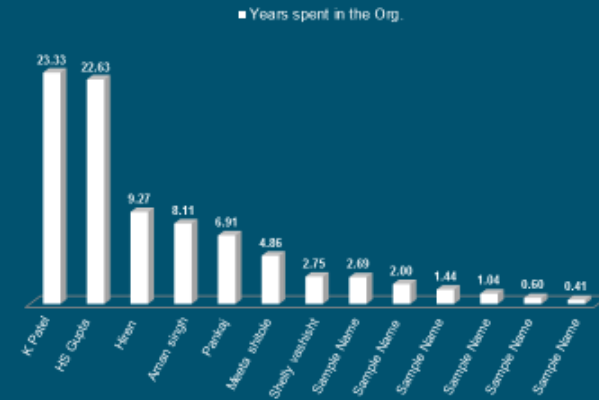
Gender Ratio



Our Initiatives

1. Team workshops to settle in new teams
2. SMT Leadership Journey: via Project Horizon
3. Addressing engagement & recognition needs via Kwench
4. Action plans for Gallup result
5. Making the workplace for more vibrant – slides follow
6. Developing frontline leaders across functions

SMT: Years spent in the Org.



LSIL Attrition % 10.40%

Before

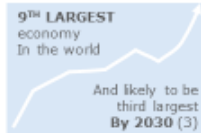
India economy

- India's GDP growth has slowed down to 6.6% in the December quarter. The growth in GDP during 2018-19 is estimated at 7.0% as compared to the growth rate of 7.2% estimated earlier
- Results of elections to Indian Parliament would be announced in May 2019
- 2019 budget exercise was aimed at pleasing farmers, informal workers and small taxpayers. This is expected to have an impact on consumer sentiments. Various labour welfare reforms have been implemented in the last year to improve the wages of formal/informal workers
- Uncertainty around space with changes to Ecommerce Policy
- There is significant slowdown in footfalls and transactions across the apparel sector. Recent ES also was a long drawn one with increasing trend of deeper discounts

After

INDIA AN OVERVIEW

ECONOMY



MAIN INDUSTRIES

GDP GROWTH FOR FY 2016 7.3% (6)

TOP EXPORTERS TO

TOP IMPORTERS FROM

COUNTRY FACTS



X 13 = INDIA
India is approximately 13 times the sizes of the UK



India has the world's largest youth population with 356 million 10-24 year-olds

INDIA

ACCOUNTS FOR



INDIA

IS THE LARGEST...



Democracy in the world, and English speaking nation in the world

MEMBER OF THE **G20**

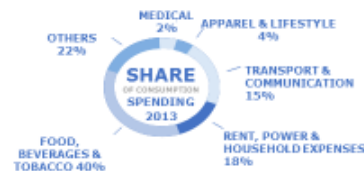
₹ CURRENCY
INDIAN RUPEE (INR)



Geographic area: 3,28 million sq km (1)

CONSUMER MARKET

- INDIA LABOR FORCE STANDS AT 496,960,163 MILLION(8)



Before

... and You Got Behind VF
in a **Big Way**

FedEx

COMCAST

Bank of America

BARCLAYS

JPMORGAN CHASE & CO.

IBM

SBERBANK

CommonwealthBank

DAIMLER

THALES

ING BANK

T-Systems

MILLICOM
THE DIGITAL LIFESTYLE

Deloitte.

Qualcomm

TESCO

AIRBUS

RBS

Elavon

CSRA

NTT

Prudential

DBS

pôle emploi

BWI

GM

SAP

BROADCOM

After

... and You Got Behind VF
in a **Big Way**

FedEx

COMCAST

Bank of America

BARCLAYS

JPMORGAN CHASE & CO.

SBERBANK

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VW

GE

GM

SAP

BROADCOM