



Unmatched Quality Tiles

**CORPORATE BRIEFING SESSION
FOR THE YEAR ENDED JUNE 30, 2020**

**Scheduled on
November 17, 2020
At 3:00 P.M.**

Agenda of the Session:

1. About Stile
2. Market Size and Share of Competitors
3. Financial Highlights of 2019-20
4. Products Portfolio
5. Q & A Session



About Stile



- Stile was founded by the "House of Habib" in 1978 which is one of the largest groups of Pakistan.
- House of Habib is a reputable group with market reputable names like;



- First private sector enterprise & Market Leader in the Ceramic and Porcelain Tiles industry of Pakistan.
- We were incorporated in Pakistan as a Public Limited company and listed on the Pakistan Stock Exchange Limited.
- We have Latest state of the art plants producing tiles for every market segment.
- ISO 9001:2015 certified from Lloyd Quality Assurance.



Why Stile?

- We are committed to provide the Best Quality products to our customers.
- Stile is the only Brand in Pakistan certified on ISO standards by Centro Ceramico, Italy.
- Stile is also the only brand making Real Porcelain Tiles in Pakistan of water absorption less than 0.5%
- We have acquired Latest European technology to produce best quality tiles.
- Stile is the first brand in Pakistan which introduced digital printing in the year 2013.
- Research & development is the backbone of Stile where we invest heavily.
- Development of Human resource is our success.
- Our strength is our Huge dealership network which has spread over to 300 plus dealers from Karachi to Gilgit.
- We are the only vertically integrated tiles manufacturer. Having retail presence with 14 company operated retail outlets currently operating in Karachi, Hyderabad, Lahore, Faisalabad, Multan, Peshawar, Rawalpindi and counting.

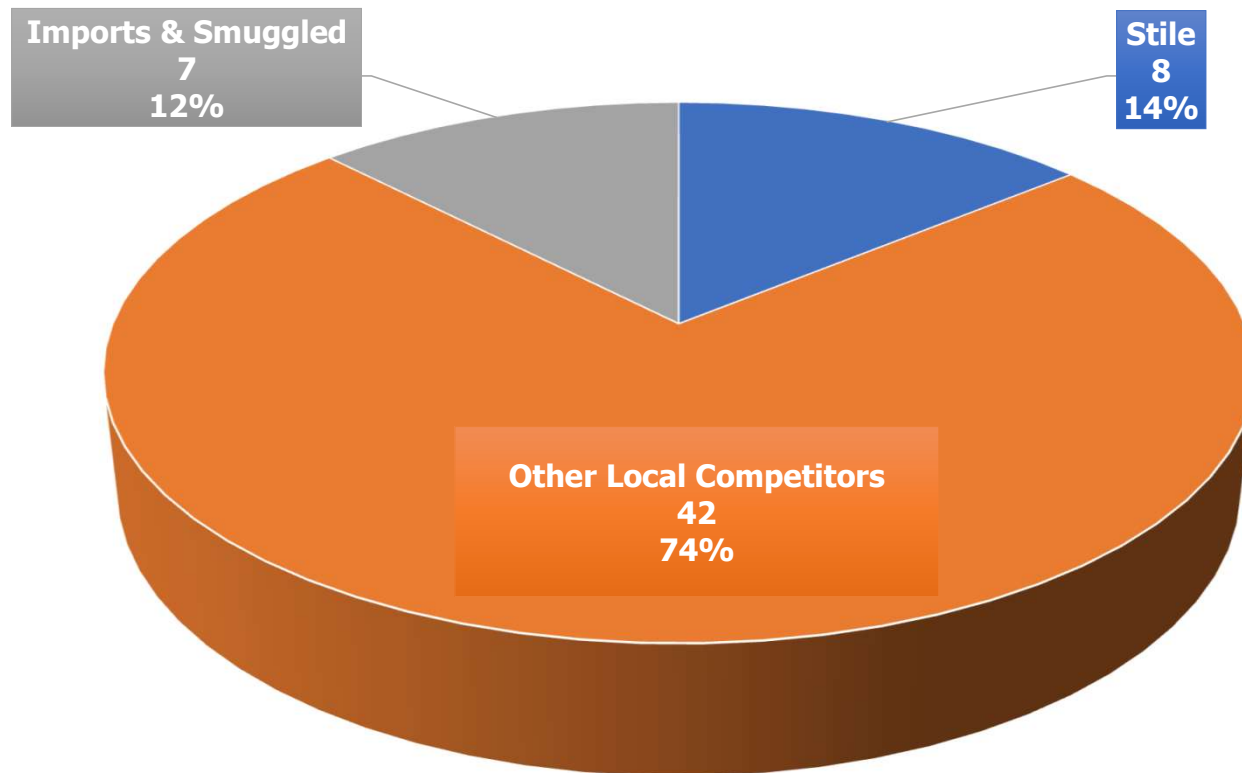


Market Size & Share of Competitors

TILES MARKET ANNUAL SHARE 2019-20

SQM in Millions

Total Estimated Market Size – 57 Million SQM

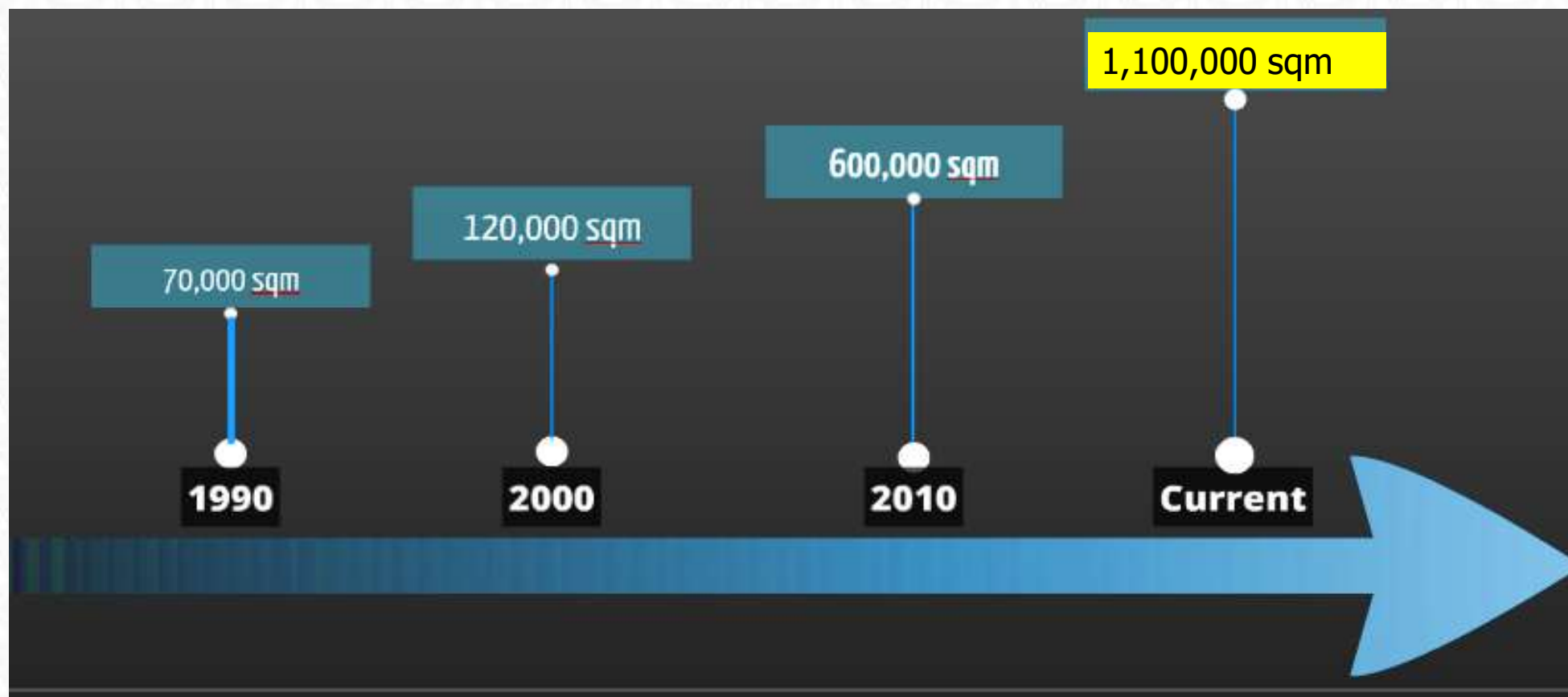


■ Stile ■ Other Local Competitors ■ Imports & Smuggled

Source: General Market Information

Average Production (Monthly)_{approx.}

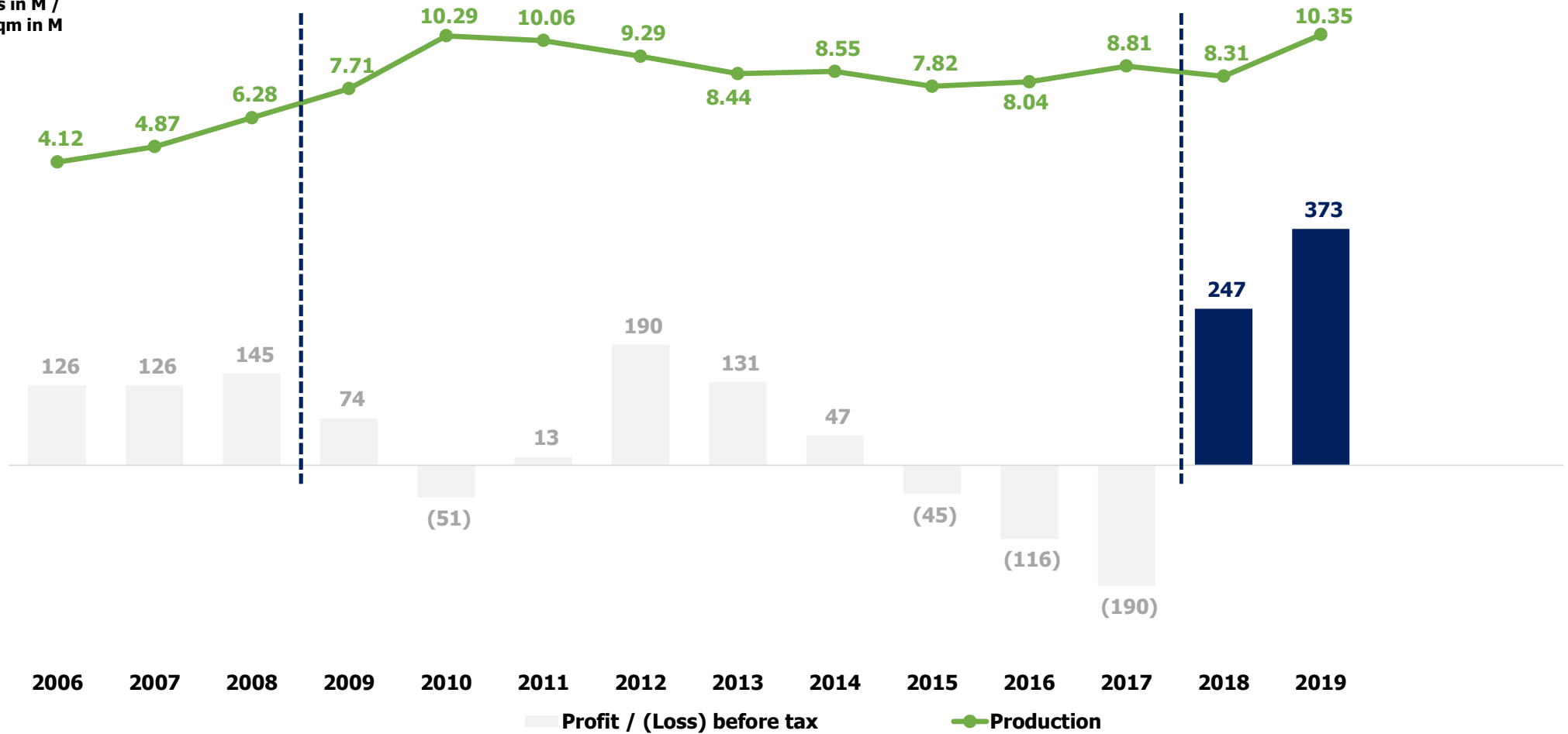
Production Capacity:
1,300,000 sqm



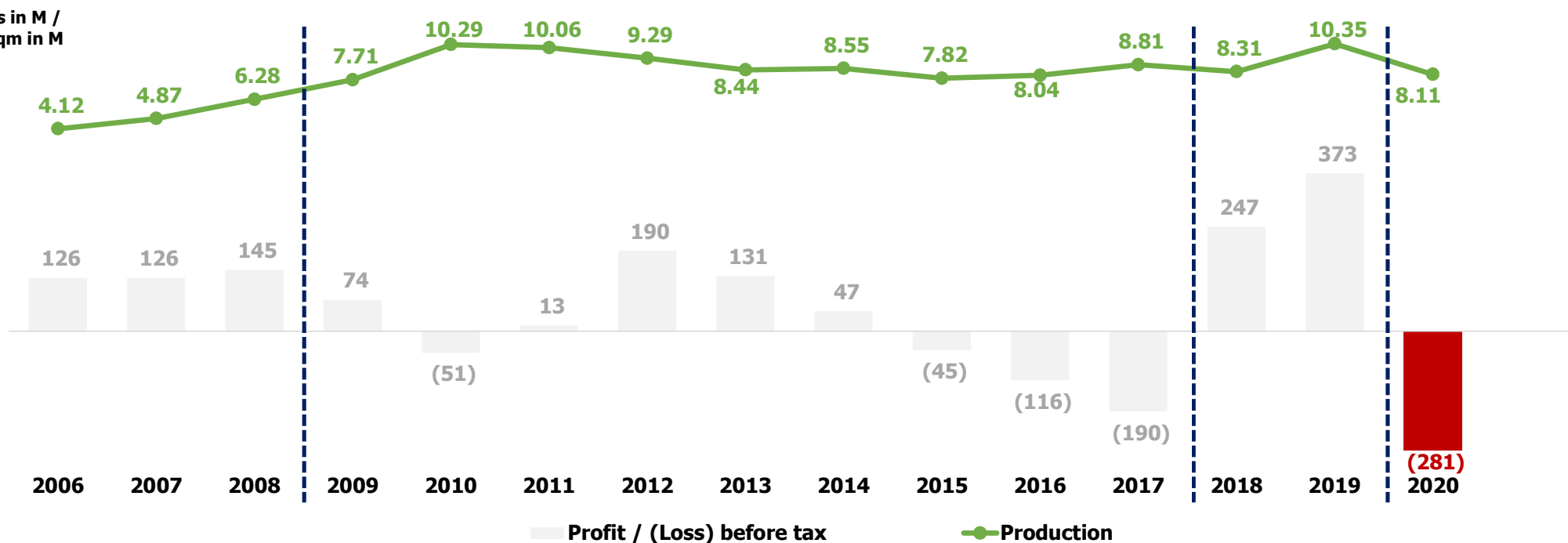
STILE EVOLUTION

STILE BUSINESS SEGMENTATION

Rs in M /
Sqm in M



Rs in M /
Sq m in M

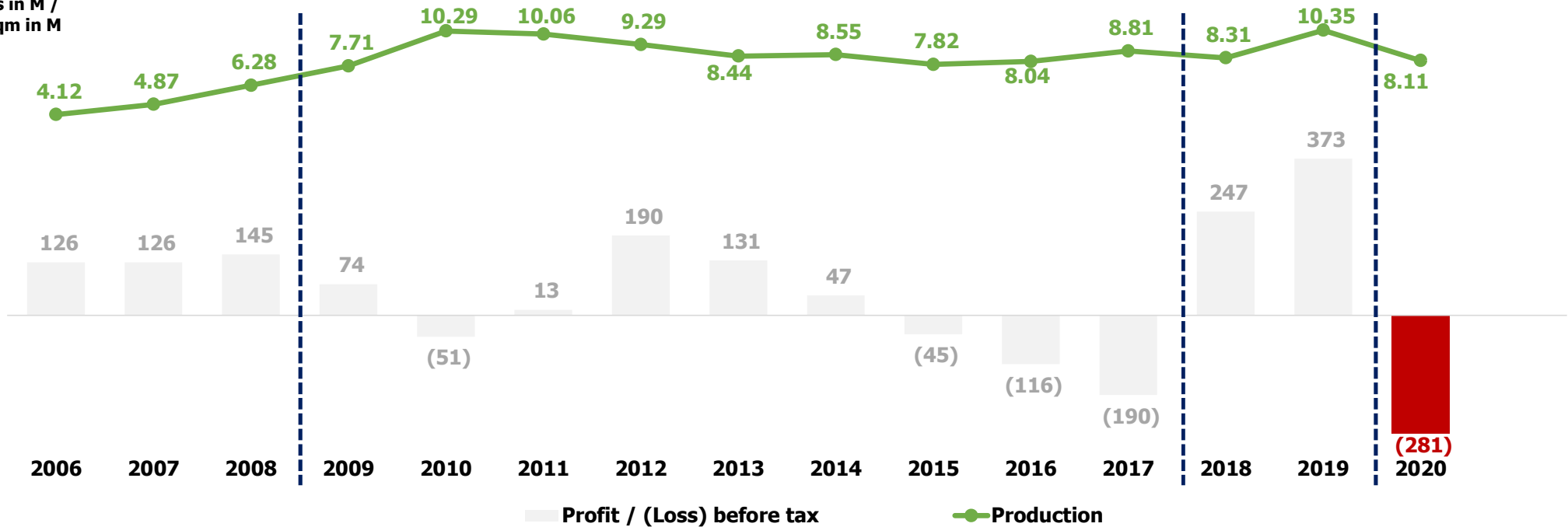


Qtr	P & L (Rs in M)	Remarks
1	(115)	Changes in tax laws plus cost pressures
2	48	Recovery mode
3	51	Recovery mode
4	(264)	Impact of Covid-19
Total	(281)	

STILE EVOLUTION

LOCKDOWN POSITIVES

Rs in M /
Sqm in M



INVENTORY

Mar 31, 20: Rs. 767 m
June 30, 20: Rs. 575 m

Rs. 192 m
 25%



DEBTORS

Mar 31, 2020: Rs. 807 m
June 30, 2020: Rs. 435 m

Rs. 372 m
 85%

BORROWINGS

NO SHORT-TERM FINANCE
 FACILITY USED

COVID-19 (SOP COMPLIANCES)

FACTORIES
 OFFICES
 EMPORIUMS



HUMAN RESOURCE

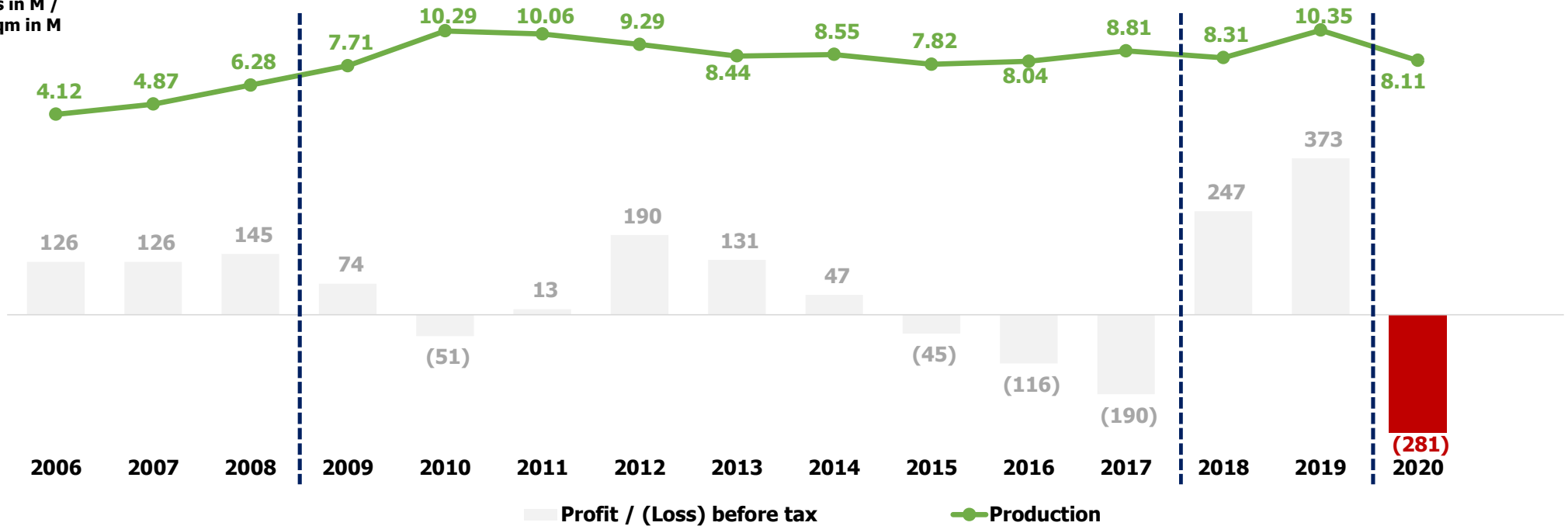
**100%
 RESOURCES
 ENGAGED**



ONLINE EMPORIUM



Rs in M /
Sq m in M



THE ORGANIZATION PREPARED ITSELF TO RESTAND AND BE GO READY

COVID-19

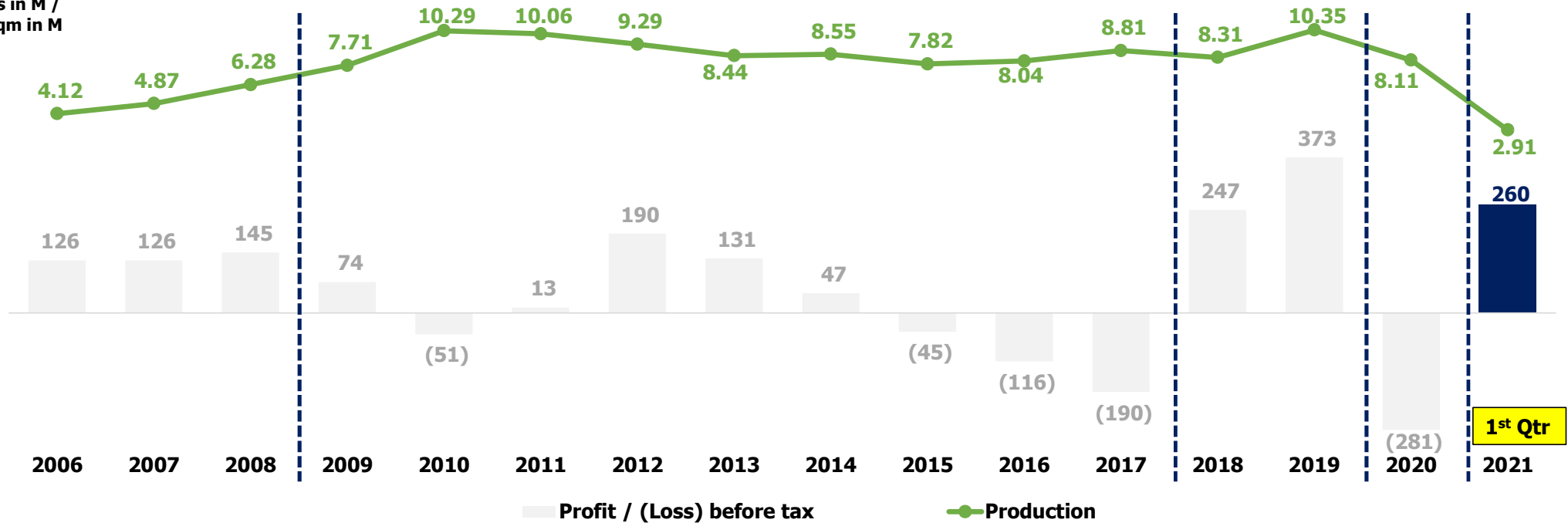
SAFETY
PROCEDURES
IMPLEMENTED

MOTIVATED TEAM

MATERIAL AND PRODUCT AVAILABILITY

ENGAGEMENT WITH CUSTOMERS

Rs in M /
Sqm in M





Product Portfolio

CERAMIC TILES

PRODUCTS RANGE



BATHROOM TILES



KITCHEN TILES

PORCELAIN TILES



NANO POLISH

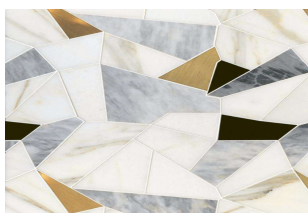


GLAZED POLISH

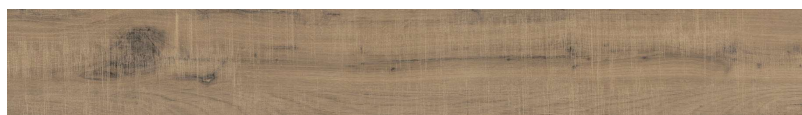


GLAZED MATT

VITRIFIED TILES



OUTDOOR TILES



WOODEN PLANKS



SIZE: 16" X 32"



SIZE: 24" X 48"



Unmatched Quality Tiles



24 x 24 | CARVING INK - SILVER MATT



24 x 24 | LAPPATTO



24 x 24 | LAPPATTO MULTI GLOSSY

24 x 24 | MICA – GREENISH GREY



Unmatched Quality Tiles

ANTI – SLIP TILES



Unmatched Quality Tiles

24 x 48 | MASJID COLLECTION



BUILDING MATERIAL PRODUCTS

Stile Bond
Grout
Latex 73
and
Epoxy Flooring



Stile Emporium & Design Studio

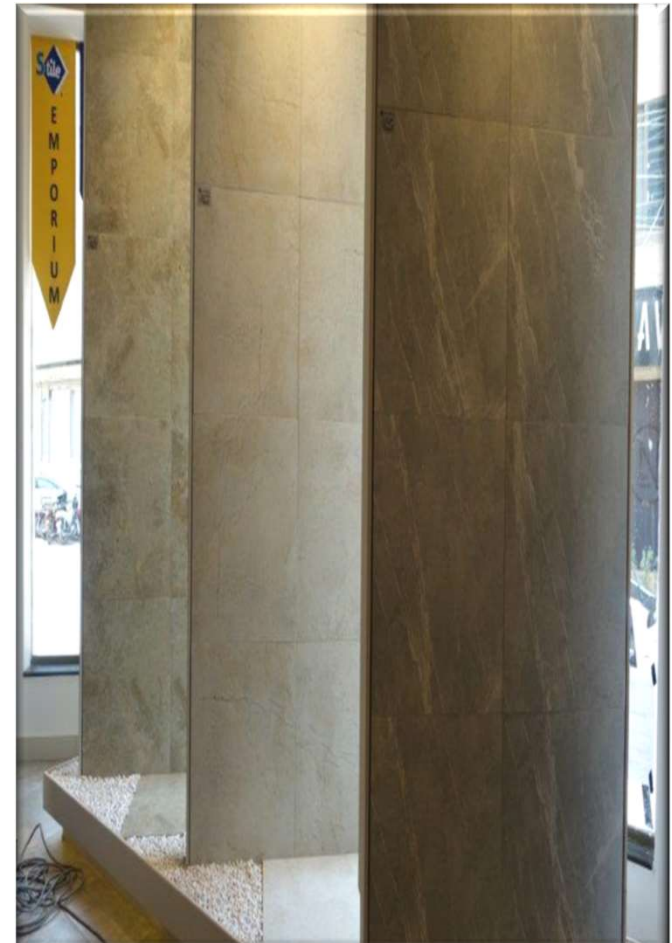








EMPORIUM & DESIGN STUDIO



EMPORIUM & DESIGN STUDIO





DOLMEN MALL ACTIVITY





Q&A

THANK YOU!