



CORPORATE BRIEFING SESSION 2023

FRIDAY NOVEMBER 17, 2023 AT 3 PM



SHABBIR TILES AND CERAMICS LIMITED



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.

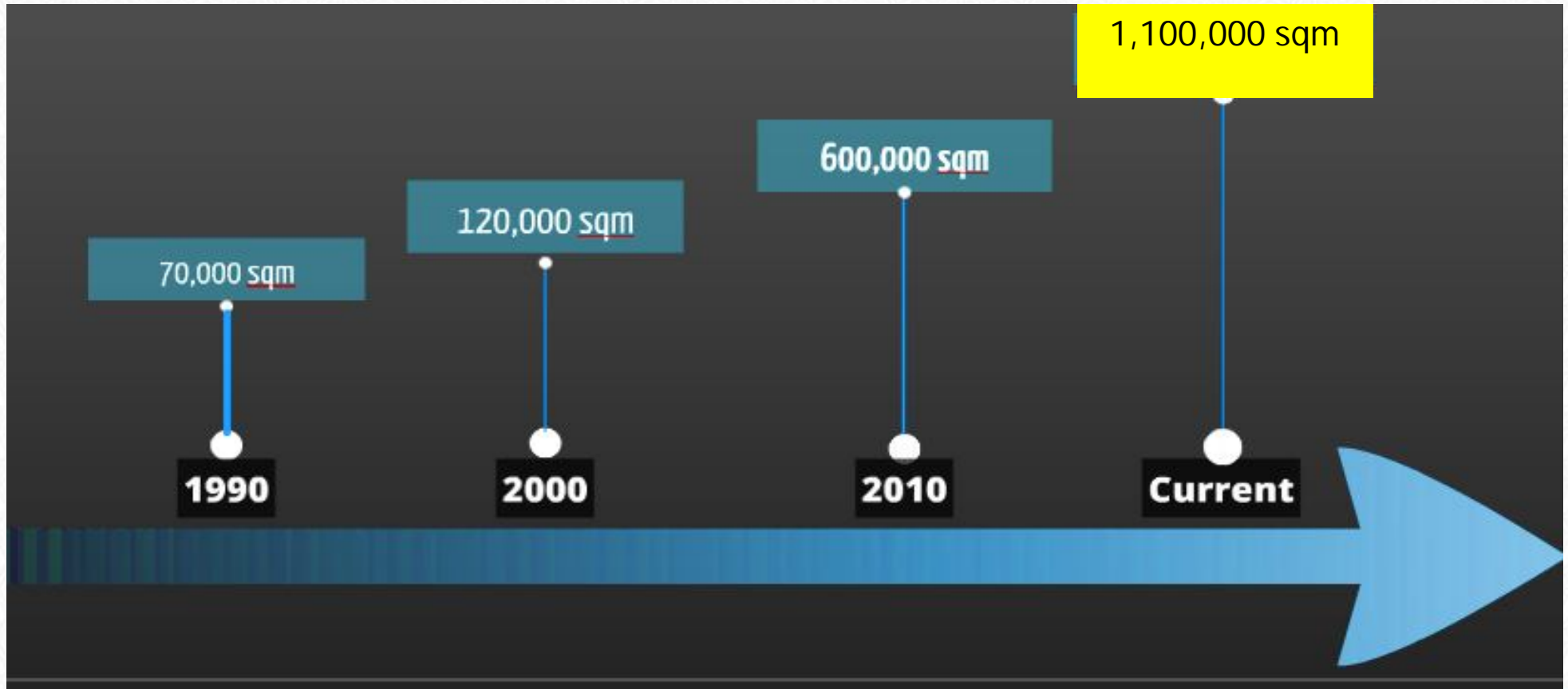


Why Stile?

- 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 on tiles.
- 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 16 company operated retail outlets currently operating in Karachi, Hyderabad, Lahore, Faisalabad, Multan, Peshawar, Rawalpindi and counting.



Average Production (Monthly)_{approx.}





Product Portfolio

CERAMIC TILES

PRODUCTS RANGE

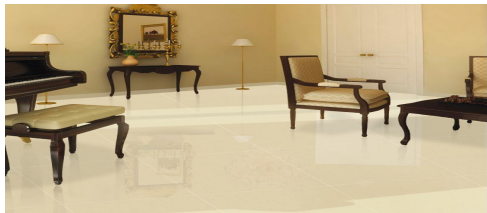


BATHROOM TILES

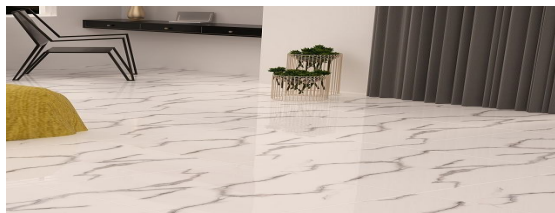


KITCHEN TILES

PORCELAIN TILES



NANO POLISH



GLAZED POLISH

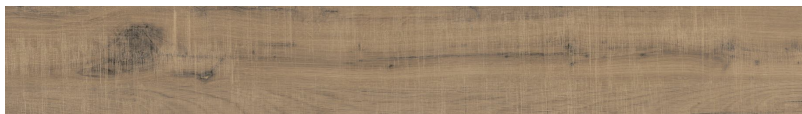


GLAZED MATT

VITRIFIED TILES



OUTDOOR TILES



WOODEN PLANKS



BUILDING MATERIAL PRODUCTS

Stile Bond
Grout

Latex 73

Stile Waterproof
and
Epoxy Flooring



Unmatched Quality Tiles



Allure 16' x 32'
Collection 400mm x 800mm



Unmatched Quality Tiles



The
BOOKMATCH
Signature Collection

24" x 48"
600mm x 1200mm





Unmatched Quality Tiles

The All-New

LANDSCAPE

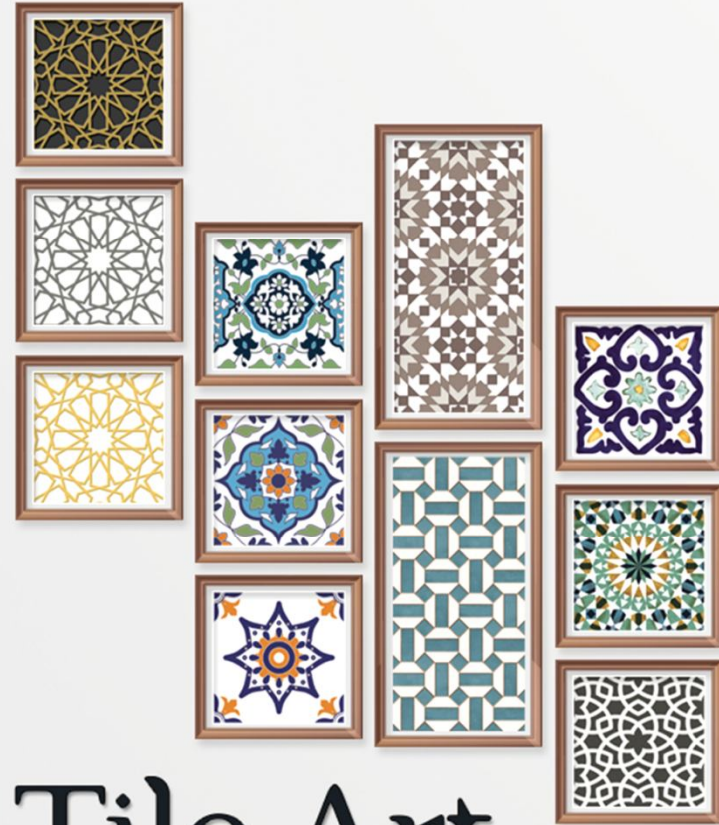
Signature Collection

24" x 24"

600mm x 600mm



Unmatched Quality Tiles



Tile Art



Unmatched Quality Tiles



The
VINTAGE 12' x 12'
Collection 300mm x 300mm



Stile Emporium & Design Studio



**STILE EMPORIUM AND DESIGN STUDIO
NEW TOWN , KARACHI**



**STILE EMPORIUM AND DESIGN STUDIO
GUJRANWALA**



**STILE EMPORIUM AND DESIGN STUDIO
WAH CANTT**



**STILE EMPORIUM AND DESIGN STUDIO
DHA BUKHARI**

Note: This is an actual image of STILE EMPORIUM, DHA Bukhari.



Store Locations



SOCIAL MEDIA PRESENCE



Unmatched Quality Tiles

ONE NUMBER

IS ALL YOU NEED

0311-11STILE

[78453]



Buy Online



Customer Inquiry



Customer Feedback



Call



WhatsApp



SMS



CLICK TO EXPLORE





STILE ONLINE EMPORIUM

Now Buy Tiles Online for the First Time in Pakistan!
Expert Assisted Selling & Online Design Consultancy

- CLICK THE ONLINE EMPORIUM LINK
- FOLLOW THE STEPS
- BROWSE THE TILE COLLECTIONS
- CHOOSE YOUR DESIGNS
- CALL OUR EXPERTS
- EXPERTS WILL GUIDE IN YOUR SELECTION
- PLACE YOUR ORDER



<https://shoponline.stile.com.pk/store> **GO**

+92-311-2653572

- Catalogs**
<https://www.stile.com.pk/catalogs>
- Virtual Tour**
<https://www.stile.com.pk/virtual-tour>
- Tile Visualiser**
<https://tiledesigner.stile.com.pk/room2d>
- Tile Calculator**
<https://tilecalculator.stile.com.pk>

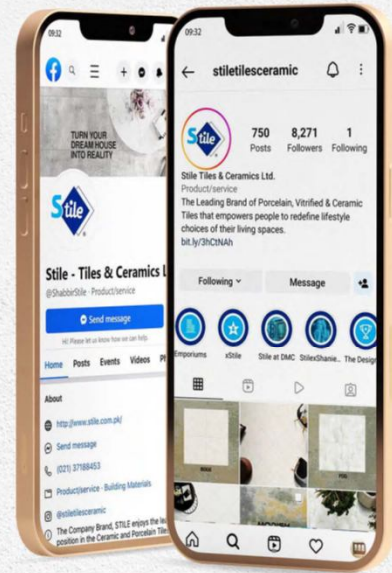


STILE CONNECT

Like, Follow, Share!
Stay connected, engaged and entertained on your favorite social media platforms.

FACEBOOK

Get updates on the latest news, product launches and discounts.



INSTAGRAM

We've got something new for you every day!

+92-311-2653572

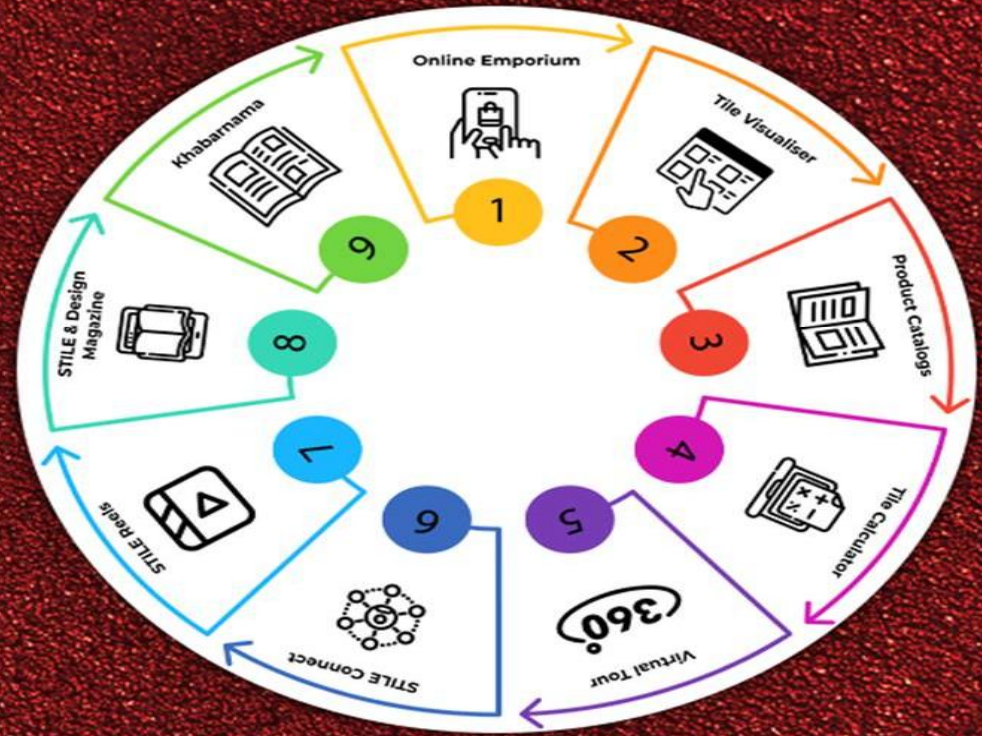
- Click to Explore**
Facebook
- Click to Explore**
Instagram
- Click to Explore**
WhatsApp



Unmatched Quality Tiles

STILE TOOLBOOK

- Features Distinctive Tools
- Explore Special Features
- User Friendly
- Clickable Links for Access
- Avail Digitally

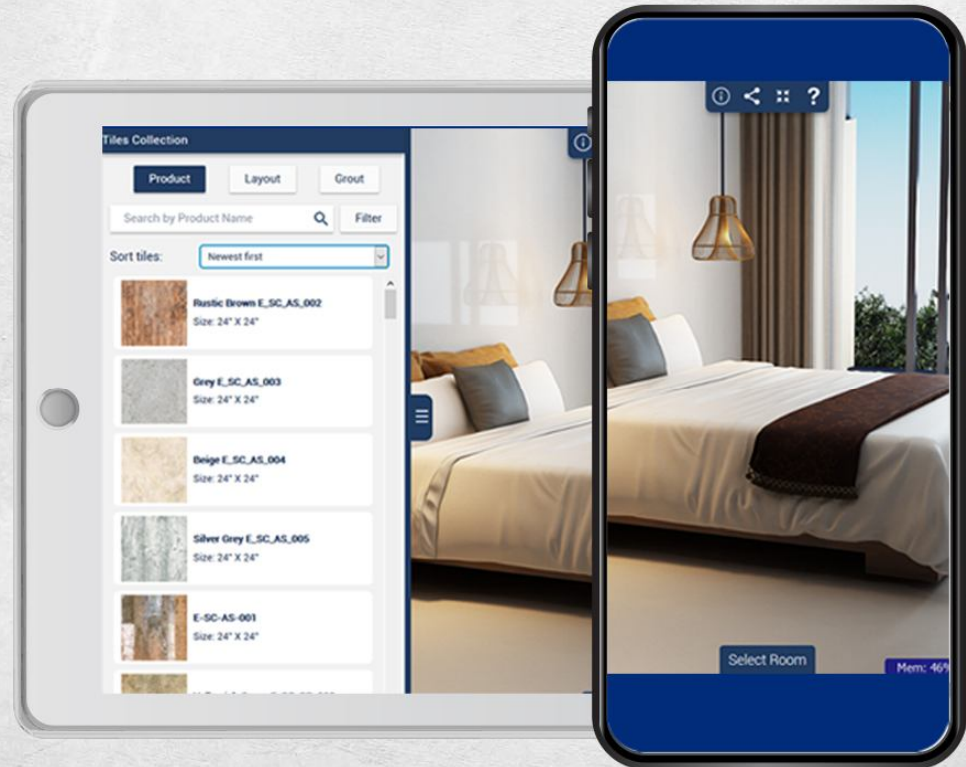


VISUALIZER

STILE TILE VISUALISER

NOW CONVERT YOUR
INSPIRATION INTO

REALITY!





VISIT OUR SAFE
STILE EMPORIUM & DESIGN STUDIO
WITH YOUR FAMILY
&
UPGRADE YOUR LIFESTYLE WITH STILE TILES

PROVIDING YOU WITH
A SAFE SHOPPING ENVIRONMENT

THERMAL SCANNING



MANDATORY WEARING OF MASK



SANITISING STATION



FREQUENT EMPORIUM CLEANING
AND DISPLAY SANITISATION



MAJOR ACTIVITIES ON SOCIAL MEDIA IN LAST YEAR

Marketing Campaigns*

(All mediums; Traditional, On-ground & Digital)

- Living with Stile (Apr.– Sept. 22)
- Why Stile (Oct. 22 – Feb 23)
- Your Stile Everywhere (Mar. – Sept. 23)
- The Majestic Stile of Pakistan (Oct. 23 – Mar. 24)

New Emporium Launch Events / Other Events

- Ferozepur, Lahore (Oct. 22)
- DHA Bukhari, Karachi (Dec. 22)
- Gujranwala (Mar. 23)
- New Town, Karachi (May 23)
- D.G. Khan (Oct. 23)
- New Product Launches
- The Yellow Day (Oct. 22)

*Includes Architect Interviews & Testimonials, Customer Testimonials & Projects Videography

Traditional Marketing Initiatives

- Morning Show, Subah se Agay (Sept. 22 – Feb. 23)
- Morning Radio Show (Aug. 23)
- Brand Development, New Signboards (Dec. 22 till date)
- Internal Rebranding of all Emporiums (Dec. 22 till date)
- Stile Art Design – a Student Initiative (Oct. 22 till date)

Digital Marketing Initiatives

- Google Ads
- YouTube Ad (Jun. 23 onwards)
- Instagram & Facebook

Publications*

- Dealer's Magazine; Khabarnama (Dec. 22 & Apr. 23)
- Architect's Magazine; Stile & Design (Dec. 22 & May 23)

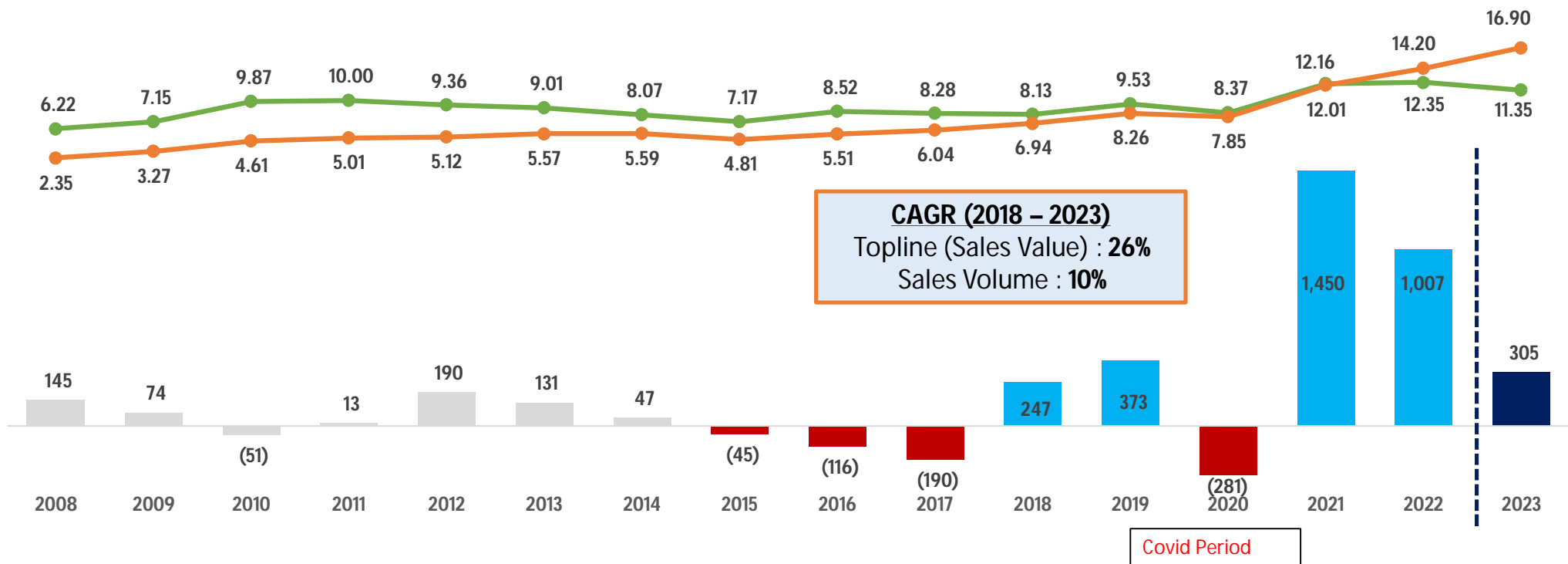
FINANCIAL HIGHLIGHTS



STILE EVOLUTION

Rs in M

Rs in M /
Sqm in M



Profit / (Loss) before tax

Sales Volume

Top Line

PRODUCTION ERA

- Monopolistic Situation
- Wall and Floor in Unit-2

SELLING ERA

- Emergence of New Players
- Competition at dealers end
- Dealer – Driver of business

MARKETING ERA

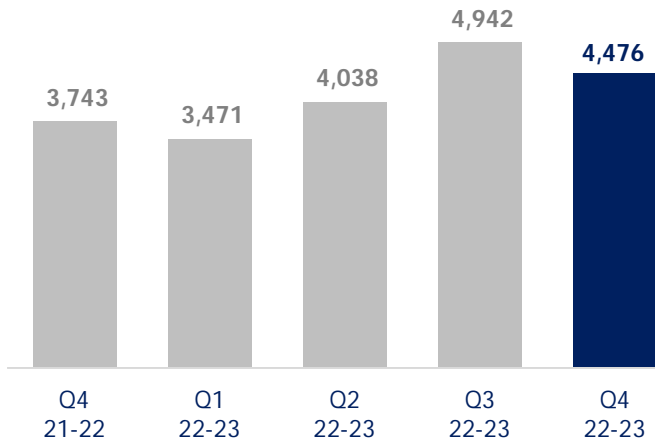
- Product positioning/differentiation
- Branding
- Advocacy
- End user engagement

KEY HIGHLIGHTS

Top Line

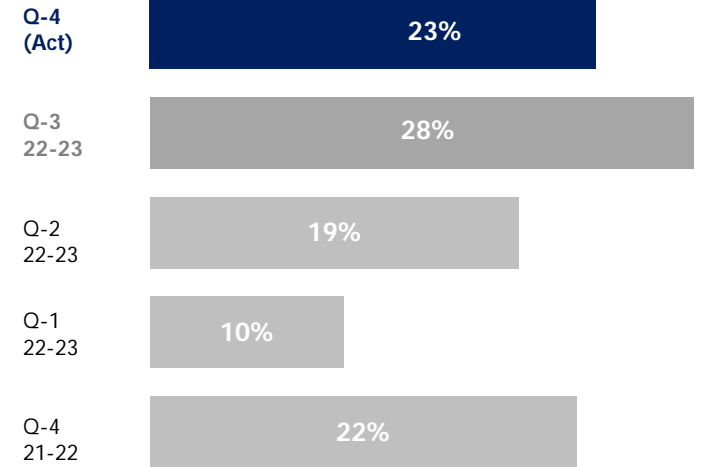
Rs in Million

Y-T-D
Act : 16,947
Bud : 18,075



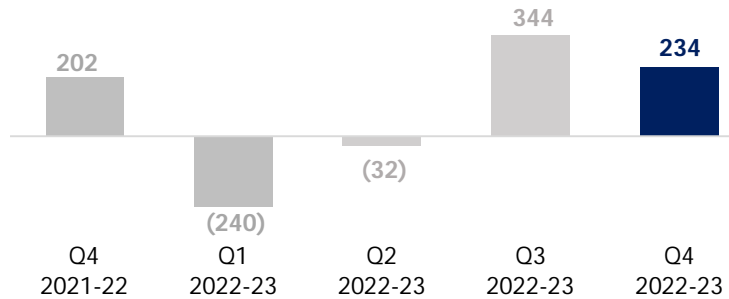
GROSS MARGIN

Y-T-D
Act : 21%
Bud : 23%



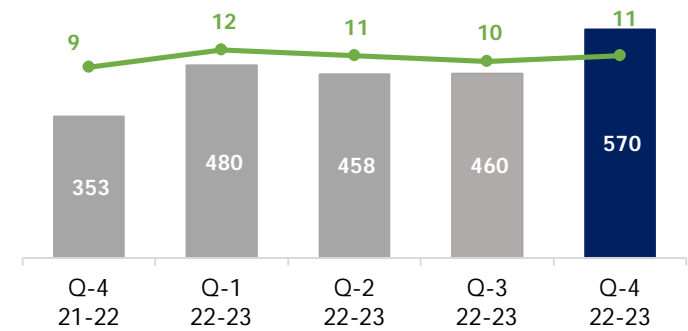
PROFIT / (LOSS) BEFORE TAX

Y-T-D
Act : Rs. 305 M
Frcst: Rs. 200 M



DEBTORS

Rs in Million and
No of Days



KEY CHALLENGES

Cost impacts

- Increase of 84% in gas tariff.
- Unstable gas pressures – quality issues.
- Vulnerable exchange rate parity (continued rupee devaluation)

Market Situation

- Lower purchasing power impacting secondary sales.
- Increasing influence of Chinese players commoditizing the market.

General Economic Policy

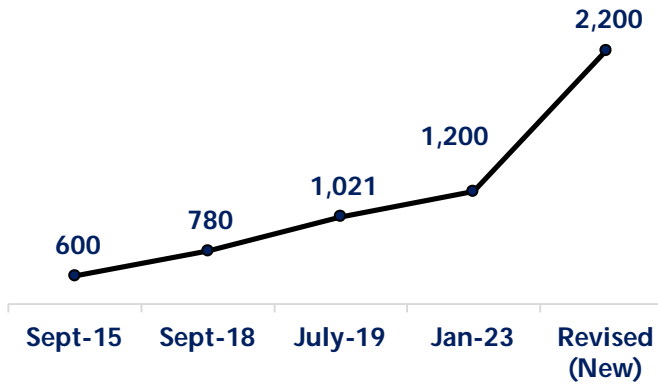
- Constant increase in diesel prices leading to rise in freight cost (inward/outward).
- Vulnerability of exchange rate impacting the business operations.



KEY CHALLENGES

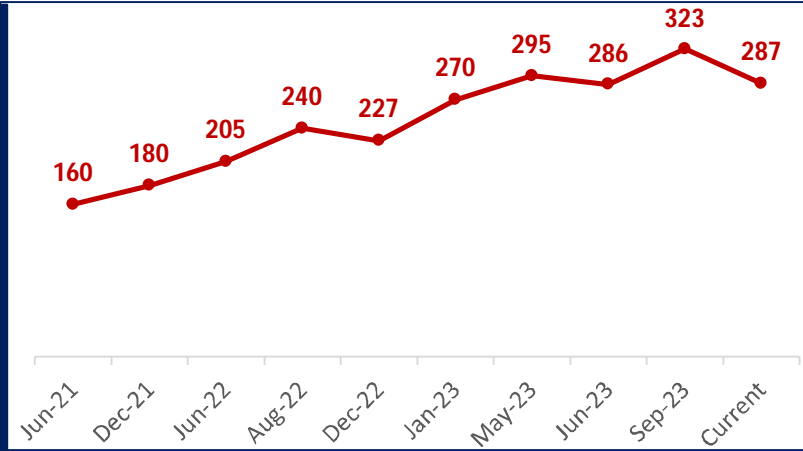
GAS TARIFF

Rs./MMBTU



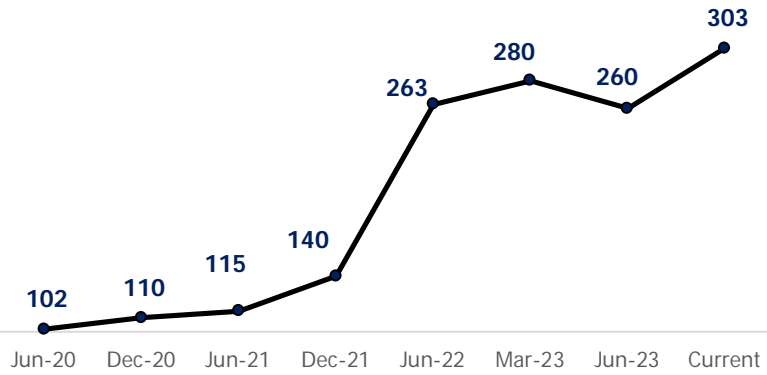
RUPEE DEVALUATION

Rs./USD



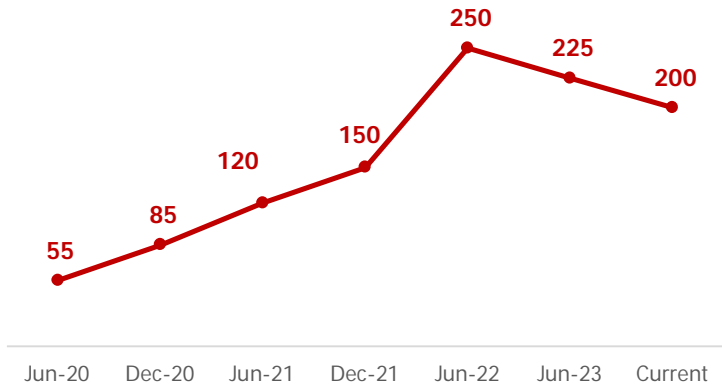
DIESEL PRICE TREND

Rs./Litre



COAL PRICE TREND

USD per Ton





Q&A

THANK YOU!