

April 30, 2025

BSE Limited Scrip Code: 543401	National Stock Exchange of India Ltd. Trading Symbol: GOCOLORS
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Dear Sir/Madam,

Sub: Investor Presentation for Q4 FY 2025 - Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015.

With reference to the above captioned subject, please find enclosed Investor Presentation for Q4 FY 25.

The aforesaid Investor Presentation is also being disseminated on company's website at <https://www.gocolors.com/investor-relations>.

This is for your information and record.

Thanking You,
For **Go Fashion (India) Limited**

Gayathri Kethar
Company Secretary & Compliance Officer
Encl: As above

GO COLORS!

Go Fashion (India) Limited



Investor Presentation

April 2025



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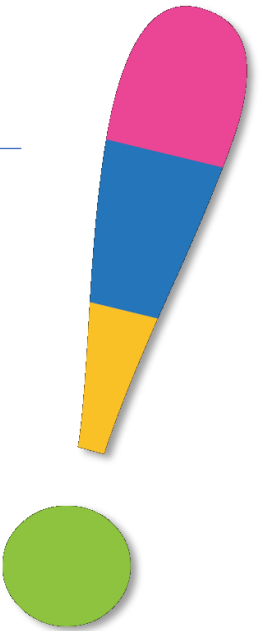
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Q4 & FY25 Highlights





Q4 FY25 FINANCIAL HIGHLIGHTS



Revenue from Operations

Rs. 204.8 crores



Gross Profit

Rs. 131.6 crores



EBITDA

Rs. 62.4 crores



Profit Before Tax

Rs. 25.4 crores

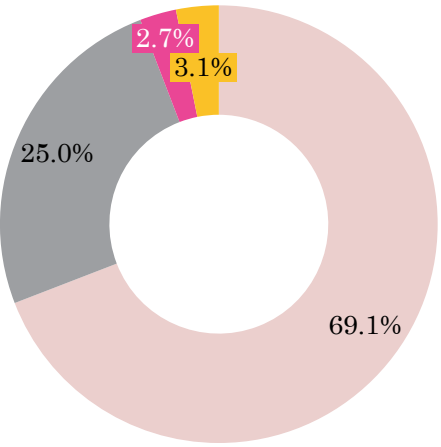


Profit After Tax

Rs. 19.9 crores

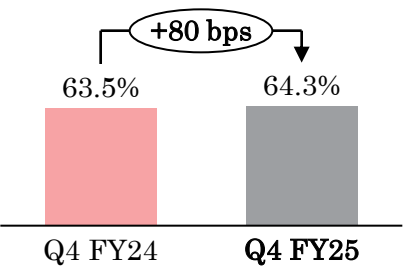


Sales Mix



EBOs Online
LFS MBO & Others

Gross Profit Margins



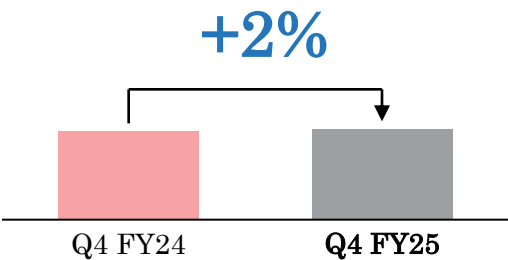
PAT Margins

9.7%

EBITDA Margins

30.5%

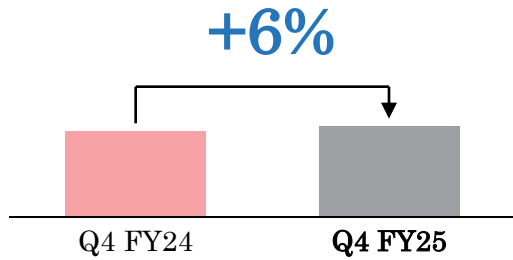
Same Store Sales Growth (SSSG)*








No. of EBO stores added during the quarter^

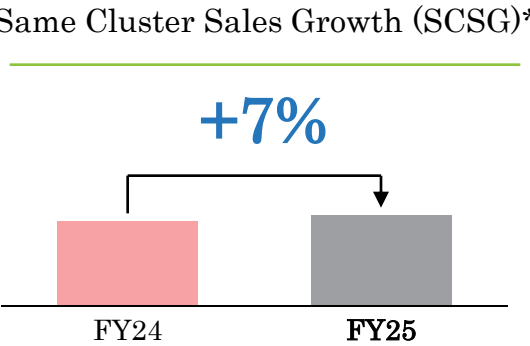
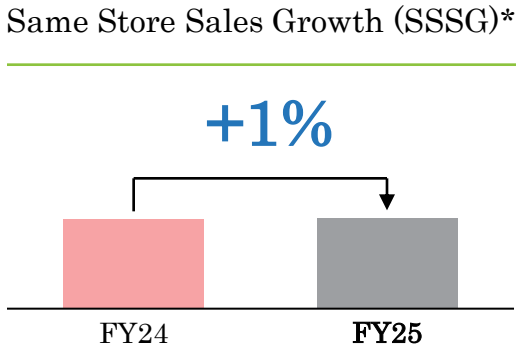
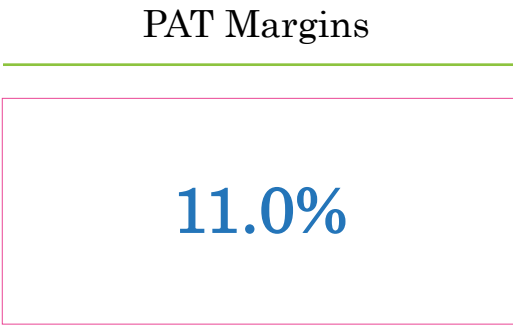
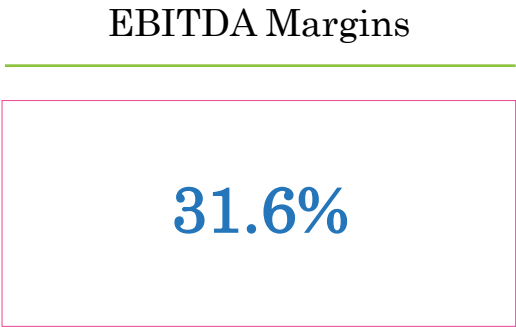
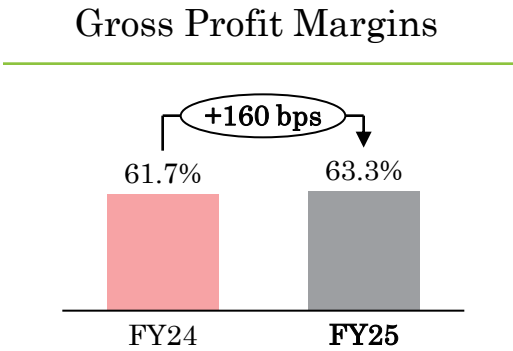
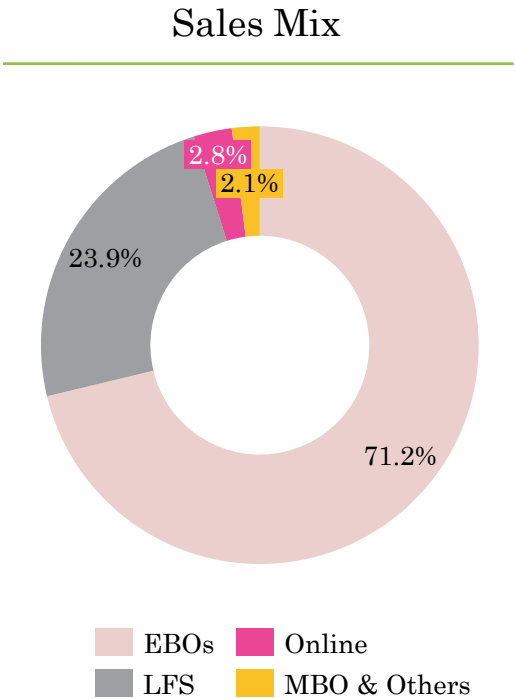
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Same Cluster Sales Growth (SCSG)*



^ Net Addition of EBO Stores All comparisons are on Y-o-Y basis * SSSG & SCSG for EBOs only

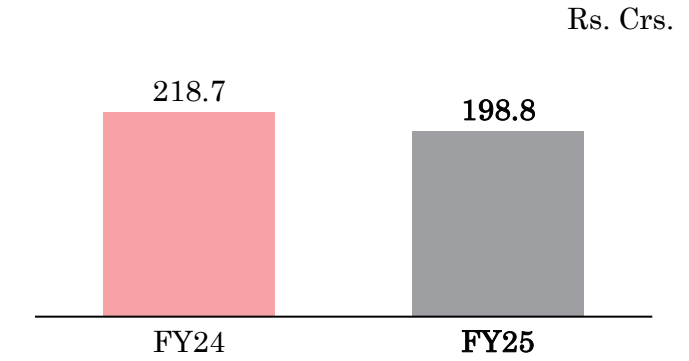
<div>Revenue from Operations</div> <div>Rs. 848.2 crores</div> <div> 11%</div>	<div>Gross Profit</div> <div>Rs. 536.8 crores</div> <div> 14%</div>	<div>EBITDA</div> <div>Rs. 268.0 crores</div> <div> 11%</div>	<div>Profit Before Tax</div> <div>Rs. 123.3 crores</div> <div> 12%</div>	<div>Profit After Tax</div> <div>Rs. 93.5 crores</div> <div> 13%</div>
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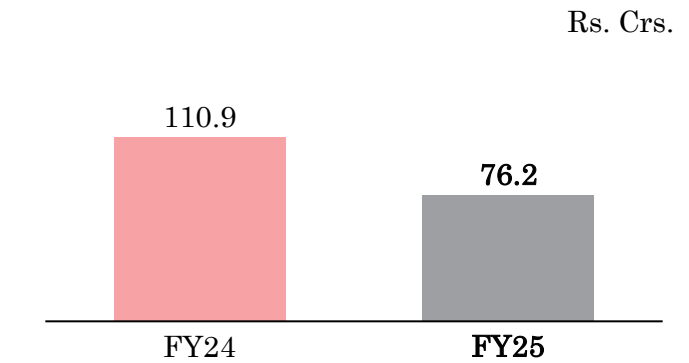


Cash Flow from Operations

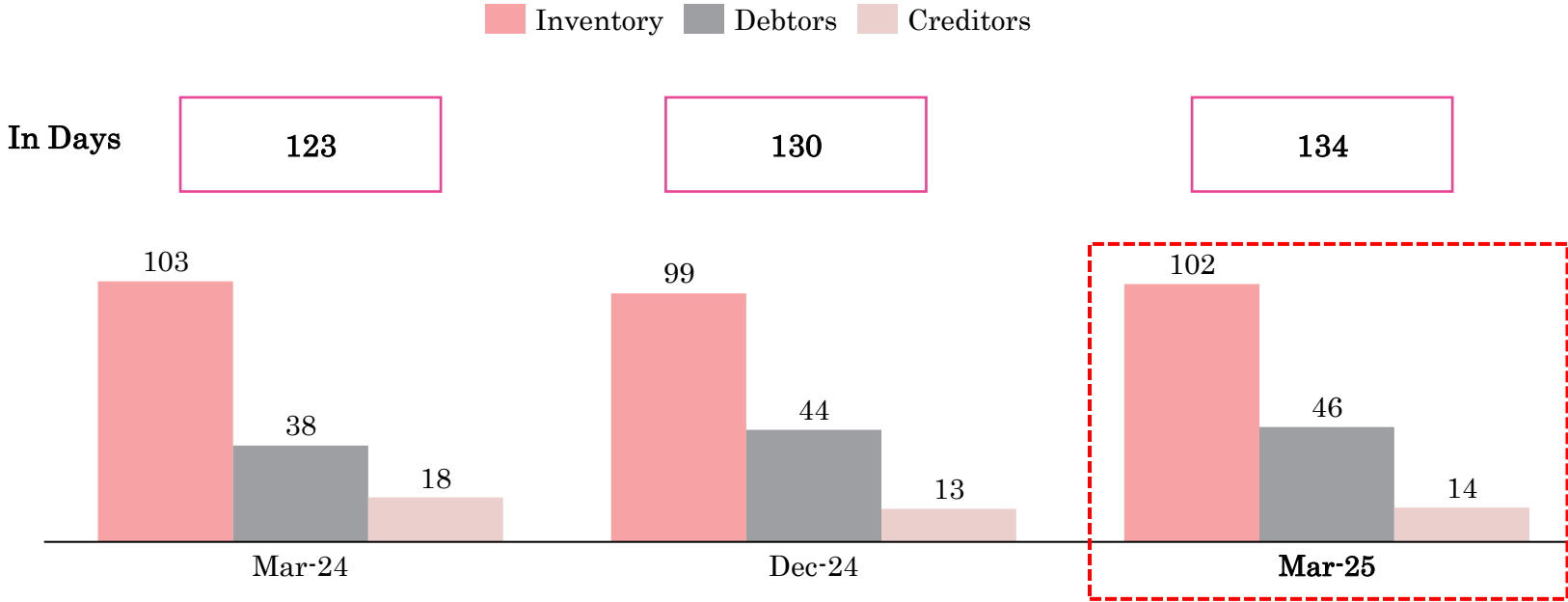
Post IND-AS 116



Pre IND-AS 116



Significant Improvement in Working Capital



RoCE*

19.2%

RoE*

15.0%

Cash & Cash
Equivalents^

Rs. 249 Crs.

^ Includes Mutual Funds & FD's

* ROCE and ROE are calculated without taking the Impact of IND-AS 116



Q4 FY25 PROFIT & LOSS STATEMENT



Profit & Loss (in Rs. Crore)	*Q4 FY25			*Q4 FY24			YoY (Reported)
	Reported	Ind-AS 116 Impact	Pre Ind-AS 116*	Reported	Ind-AS 116 Impact	Pre Ind-AS 116*	
Total Revenue	204.8		204.8	181.7		181.7	13%
Cost of Goods Sold	73.2		73.2	66.3		66.3	
Gross Profit	131.6		131.6	115.4		115.4	14%
Gross Margin	64.3%		64.3%	63.5%		63.5%	
Employee Cost	41.6		41.6	35.0		35.0	
Rent Expense	6.9	32.0	39.0	7.2	30.5	37.7	
Other Expenses	20.7		20.7	19.4		19.4	
EBITDA	62.4		30.4	53.9		23.4	16%
EBITDA Margin	30.5%		14.8%	29.7%		12.9%	
Other Income	6.6	(2.2)	4.5	5.5	(1.8)	3.7	
Depreciation	31.4	(26.1)	5.3	30.7	(25.0)	5.7	
EBIT	37.6		29.5	28.7		21.4	
Finance Cost	12.2	(11.7)	0.5	11.5	(11.4)	0.1	
Profit before Tax	25.4		29.0	17.2		21.3	48%
Tax	5.5		5.5	4.2		4.2	
PAT	19.9		23.5	13.1		17.1	52%
PAT Margin	9.7%		11.5%	7.2%		9.4%	
EPS (in Rs.)	3.68		4.35	2.42		3.17	



FY25 PROFIT & LOSS STATEMENT



Profit & Loss (in Rs. Crore)	FY25			FY24			YoY (Reported)
	Reported	Ind-AS 116 Impact	Pre Ind-AS 116*	Reported	Ind-AS 116 Impact	Pre Ind-AS 116*	
Total Revenue	848.2		848.2	762.8		762.8	11%
Cost of Goods Sold	311.4		311.4	291.9		291.9	
Gross Profit	536.8		536.8	470.9		470.9	14%
Gross Margin	63.3%		63.3%	61.7%		61.7%	
Employee Cost	160.2		160.2	130.2		130.2	
Rent Expense	13.6	125.0	138.6	15.6	107.8	123.4	
Other Expenses	95.0		95.0	82.6		82.6	
EBITDA	268.0		143.0	242.4		134.7	11%
EBITDA Margin	31.6%		16.9%	31.8%		17.7%	
Other Income	25.4	(9.0)	16.3	17.3	(5.0)	12.3	
Depreciation	123.7	(101.7)	22.0	110.4	(89.8)	20.6	
EBIT	169.7		137.3	149.4		126.4	
Finance Cost	46.4	(45.9)	0.5	39.1	(39.0)	0.1	
Profit before Tax	123.3		136.8	110.2		126.2	12%
Tax	29.8		29.8	27.4		27.4	
PAT	93.5		107.0	82.8		98.8	13%
PAT Margin	11.0%		12.6%	10.9%		13.0%	
EPS (in Rs.)	17.31		19.81	15.32		18.29	

BALANCE SHEET

EQUITY AND LIABILITIES (in Rs. Crore)	31-Mar-25	31-Mar-24
Equity		
Share Capital	54.0	54.0
Other Equity	643.4	549.9
Total Equity	697.4	603.9
Liabilities		
Non Current Liabilities		
Lease liabilities	416.6	393.4
Provision	6.1	5.1
Total Non Current Liabilities	422.8	398.5
Current Liabilities		
Lease liabilities	90.4	75.7
Trade payables	31.6	36.8
Other financial liabilities	23.6	21.0
Current tax liabilities (net)	3.9	1.3
Other current liabilities	8.2	4.1
Provisions	2.6	0.6
Total Current Liabilities	160.2	139.6
TOTAL EQUITY & LIABILITIES	1,280.3	1,142.0

ASSETS (in Rs. Crore)	31-Mar-25	31-Mar-24
Non Current Assets		
Property, plant and equipment	111.7	101.3
Capital work-in-progress	11.5	10.9
Intangible assets	0.8	0.9
Right-of-use assets	447.5	424.5
Financial Assets		
Other financial asset	40.2	36.1
Deferred tax assets (net)	31.7	23.4
Other non-current assets	1.3	2.1
Total Non-Current Assets	644.5	599.1
Current Assets		
Inventories	237.6	215.9
Financial Assets		
Investments	9.7	6.1
Trade receivables	105.7	79.8
Cash and cash equivalents	16.1	15.7
Bank balances other than cash and cash equivalents	222.2	176.4
Other financial assets	13.6	17.3
Other current assets	30.7	31.8
Total Current Assets	635.8	542.9
TOTAL ASSETS	1,280.3	1,142.0

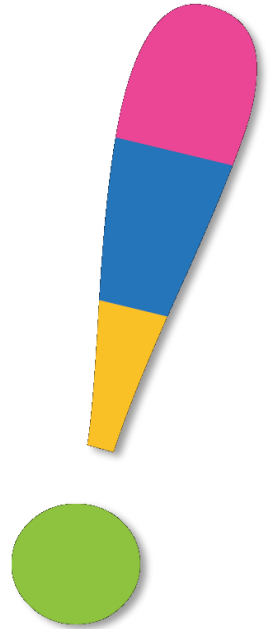


CASH FLOW STATEMENT

Cash Flow Statement (in Rs. Crore)	FY25	FY24
Net Profit Before Tax	123.3	110.2
Adjustments for: Non - Cash Items / Other Investment or Financial Items	152.2	136.4
Operating profit before working capital changes	275.5	246.6
Changes in working capital	-41.1	8.7
Cash generated from Operations	234.4	255.3
Direct taxes paid (net of refund)	-35.6	-36.6
Net Cash from Operating Activities	198.8	218.7
Net Cash from Investing Activities	-75.6	-128.9
Net Cash from Financing Activities	-122.7	-107.8
Net Decrease in Cash and Cash equivalents	0.4	-17.9
Add: Cash & Cash equivalents at the beginning of the period	15.7	33.7
Cash & Cash equivalents at the end of the period	16.1	15.7
Cash & Cash equivalents at the end of the year including Mutual Funds & FDs	248.5	198.4



Company Overview





One-stop destination for all women's bottom wear

✓ Among the largest Women Bottom Wear (WBW) brands in India with ~8% market share in branded WBW

✓ Customers catered primarily through **776** EBOs spread across 23 states and UTs and **2,386** LFSs across 31 states and UTs

✓ Premium quality products at affordable prices, **81.8% of products** retailed at < Rs. 1,049

✓ Extensive sourcing and manufacturing network of 135 suppliers and 68 job-workers spread across 12 states and UTs

✓ Supply chain for all channels managed from 99K sq. ft. warehouse in Tirupur, Tamil Nadu and 12K sq. ft. warehouse in Bhiwandi, Maharashtra. End-to-end automation in inventory operations resulting in optimal inventory management

50+ styles of bottom wear in
120+ colours.

‘If it is anything to do with bottomwear, don’t look beyond Go Colors.’



Well Diversified Product Portfolio



Ethnic Wear



- Churidar
- Salwar
- Patiala
- Silk-Pants
- Kurti-Pants
- Dhoti

From ₹ 599 to ₹ 1,399 ⁽¹⁾

Western Wear



- Leggings
- Ponte Pants
- Cropped Jegging
- Track Pants
- Jeans
- Culottes
- Cargo Pants
- Treggings
- Trousers
- Shorts

From ₹ 499 to ₹ 1,399 ⁽¹⁾

Fusion Wear



- Jeggings
- Palazzos
- Pants
- Harem-Pants

From ₹ 599 to ₹ 1,599 ⁽¹⁾

Athleisure



- Leggings
- Track Pants
- Joggers

From ₹ 799 to ₹ 1,199 ⁽¹⁾

Note: (1) Typical Range of Offering: Maximum Retail Price



Denims



- Jeggings
- Pants
- Joggers
- Denim Culottes
- Jeans
- Capris
- Denim Palazzos

From ₹ 799 to ₹ 1,499 ⁽¹⁾

Lounge Wear



- Lounge Pants
- Lounge Knit Pants
- Lounge Capris
- Lounge Shorts

From ₹ 449 to ₹ 949 ⁽¹⁾

Go Plus



- Churidars
- Leggings
- Jeggings
- Pants
- Palazzos

From ₹ 599 to ₹ 1,599 ⁽¹⁾

Girls Wear



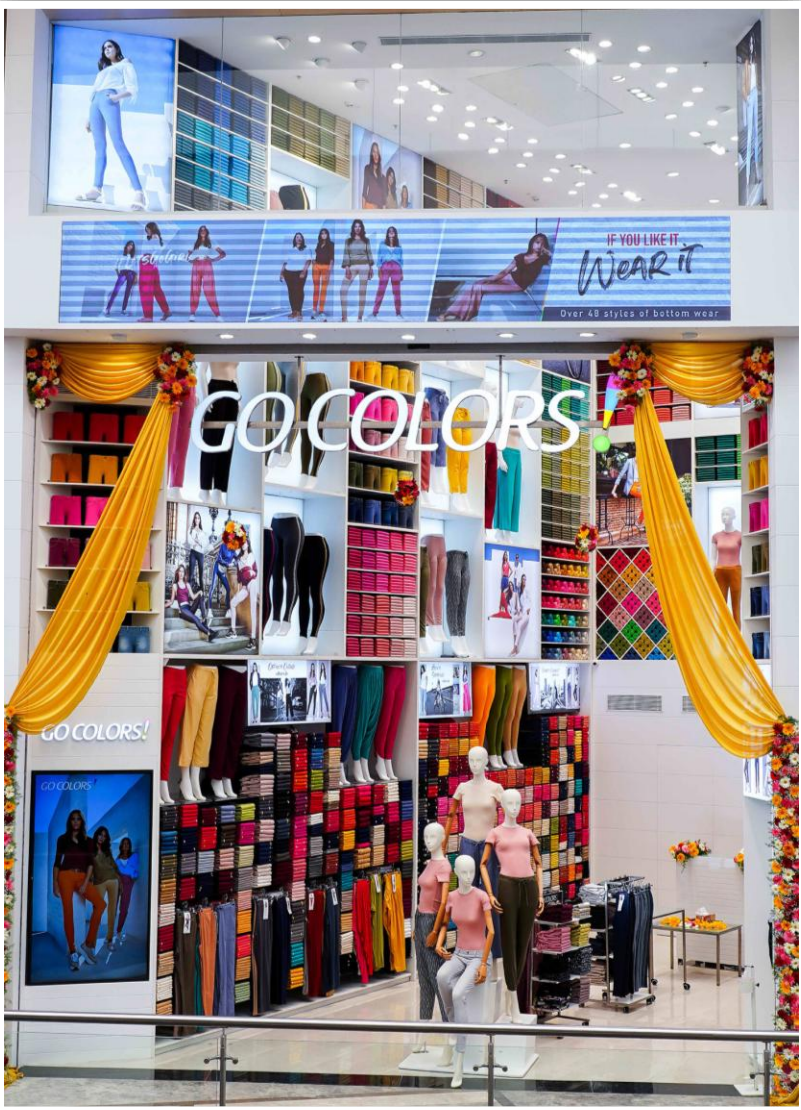
- Leggings
- Pants
- Jeggings
- Shorts
- Palazzos
- Harem- Pants

From ₹ 249 to ₹ 999 ⁽¹⁾

Note: (1) Typical Range of Offering: Maximum Retail Price



STANDARDIZED STORE DESIGNS AND LAYOUTS TO MAKE BRAND “GO COLORS” READILY IDENTIFIABLE

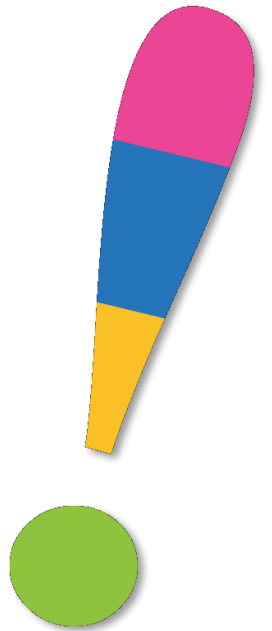


EBO Stores + Airport Stores +
LFS Stores





Key Differentiators



Among the Largest Women's Bottom-Wear Brand in India with Well-Diversified & Differentiated Product Portfolio and First Mover Advantage



Strong Unit Economics with an Efficient Operating Model



Demonstrated Track Record of Strong Financial Performance



Multi-Channel, Pan-India Distribution Network with a Focus on EBOs, Enhancing Brand Visibility



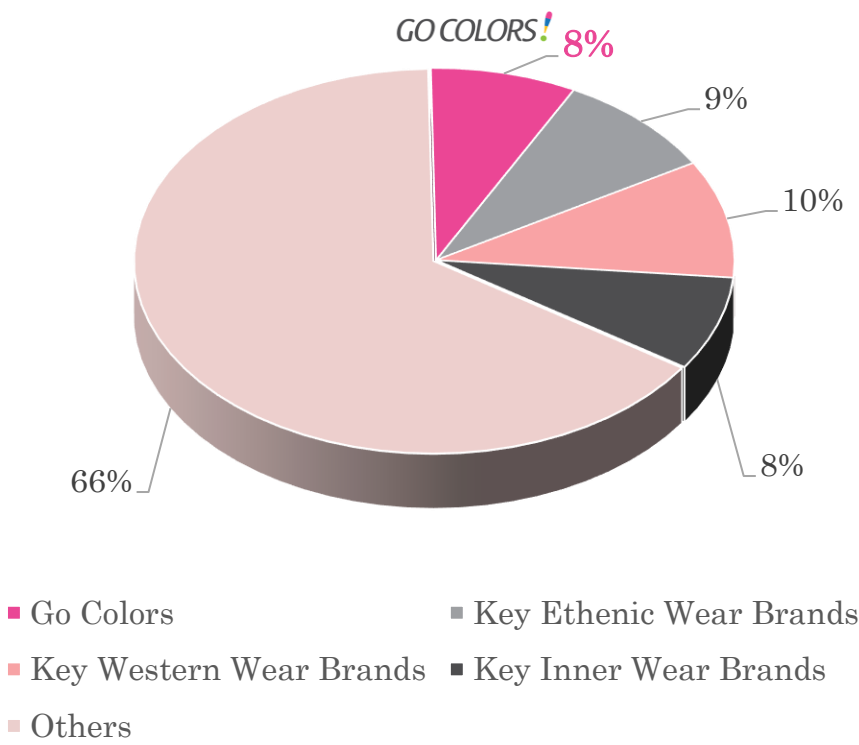
Extensive Procurement Base with Highly Efficient and Technology-Driven Supply Chain Management



In-House Expertise in Developing and Designing Products



% Branded Women’s Bottom Wear Market (FY20)



Covering the entire spectrum of women’s requirements across age-groups and body-types

Brand	SKUs	Ethnic	Western	Athleisure	Fusion	Denim
GO COLORS	728	✓	✓	✓	✓	✓
Player A	800	✗	✓	✗	✗	✓
Player B	700	✓	✗	✗	✓	✓
Player C	673	✓	✓	✗	✓	✗
Player D	656	✗	✓	✗	✗	✓
Player E	343	✓	✗	✓	✓	✓

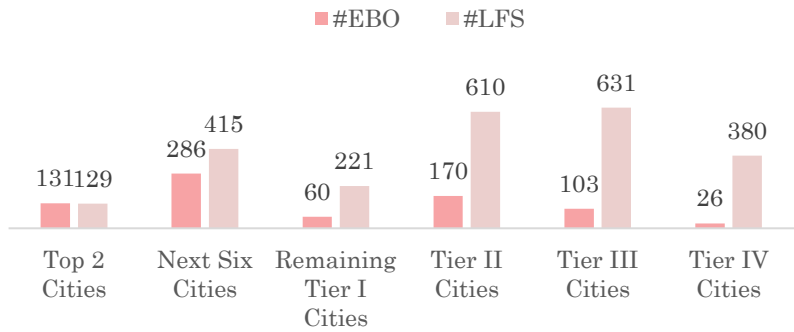
Go Colors offers products across multiple categories making its portfolio ‘universal’ & round-the-year for every occasion that is not subject to seasonal trends



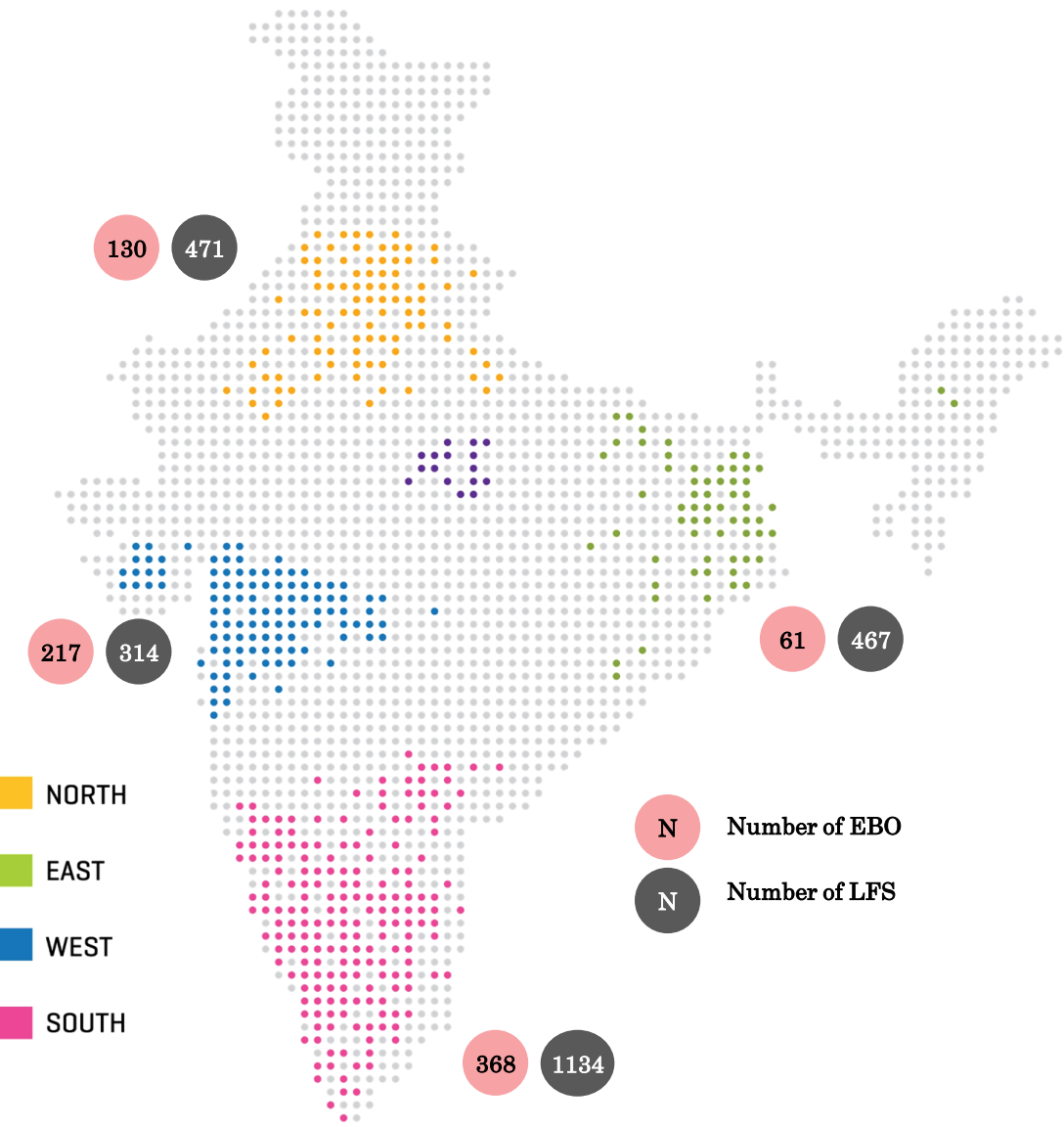
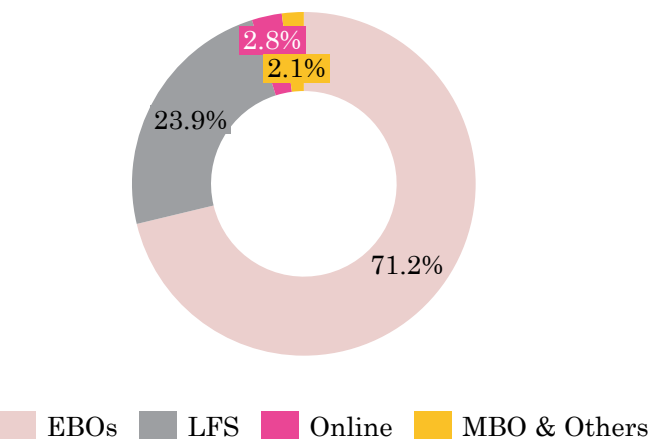
DIRECT TO CONSUMER BRAND WITH AN EXTENSIVE DISTRIBUTION NETWORK ACROSS INDIA



Diversified presence across geographies



Sales Mix



EBO Stores
776

Malls & Airports (200)
High Streets (576)

Cities Present
180

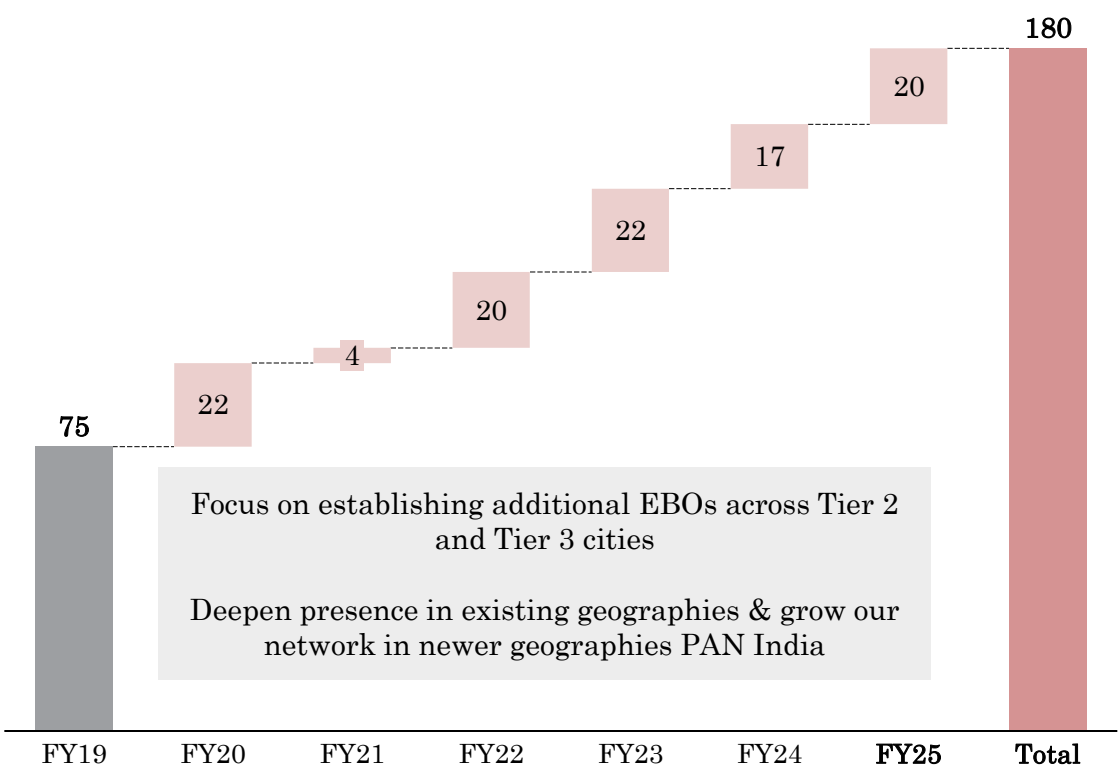
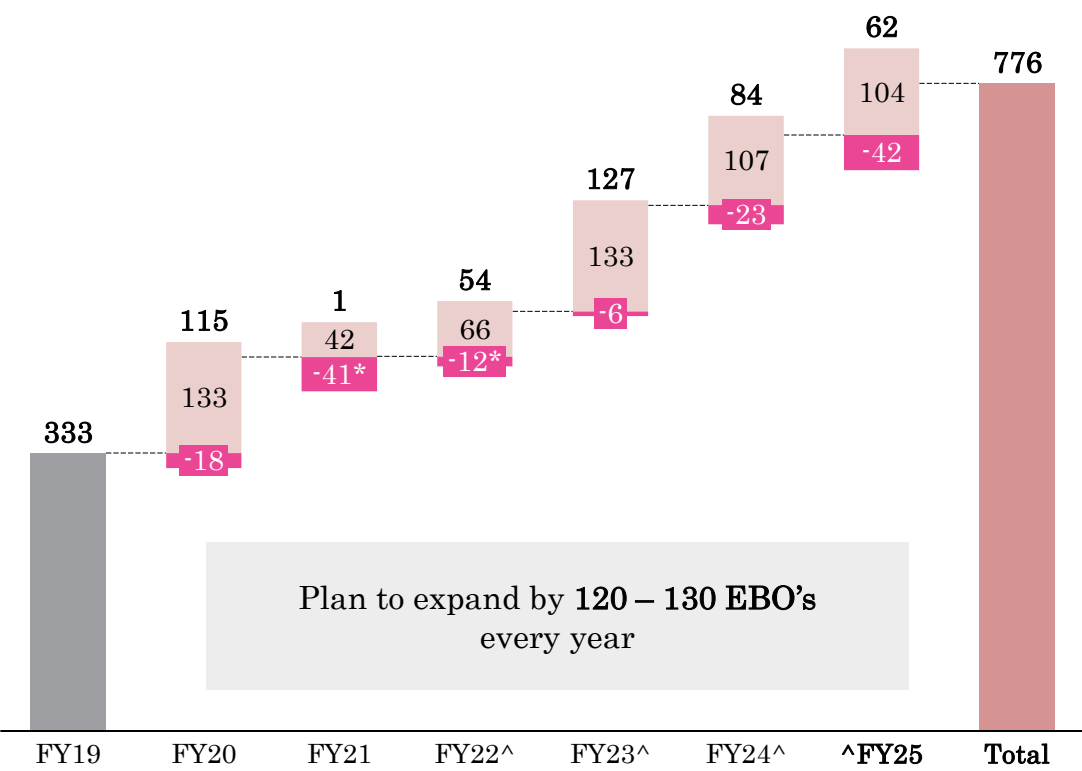
Cluster-based model
53.7%

EBOs across top 8 cities

Large Format Stores
2,386



CONTINUOUS INCREASE OF EBO PRESENCE PAN INDIA



New EBO Stores Opened Closed during the period

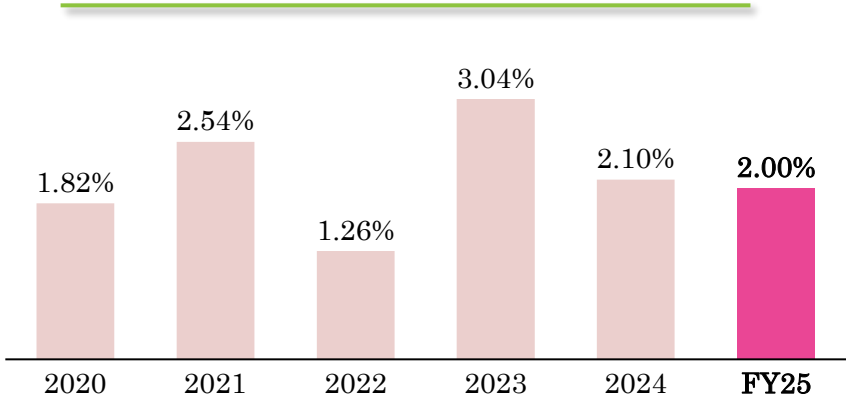
New Cities PAN India

* Majority of stores closed down in FY21 and FY22 are due to CoVID impact

^ FY22, FY23, FY24 & FY25 stores are net of replacements



Prudent use of resources to undertake brand-building initiatives and gain visibility



Rs. 49.10 of Revenue
on every rupee of Advertisement Spent



Store at high footfall location with large external hoardings

Go Colors utilizes its EBOs as its primary advertising channel

Outdoor marketing initiatives include leveraging advertisements through large hoardings at vantage points, bus shelters and metro pillars

Situated in locations with significant footfalls, increasing brand visibility and enhancing brand equity and recall

Significant importance on digital marketing by creating frequent consumer generated content uploaded across social media platforms



Standardized visual designs and layout of the store

Efficient Space Utilization offers one of the highest sales per square foot in the industry

Average Store Size (Sq. ft.)

400 - 600

Average Selling Price*

Rs. 769

Present across

180 cities

Average Investments for 1 EBO store (Incl. Inventory)

Rs. 37 - 38 Lakhs

Payback Period

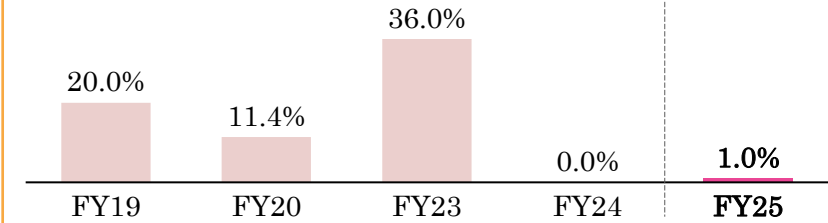
15 – 18 months

Average Yearly Revenue Per Store

Rs. 85-90 Lakhs

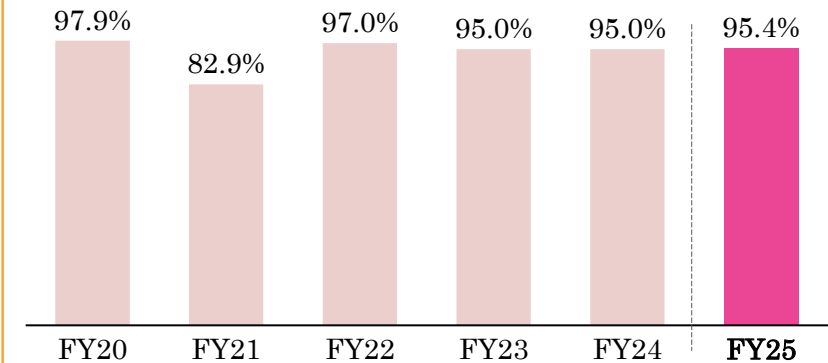
- Store location and size optimized, ensuring the sustainability of store profitability
- Ability to identify the stores at the right location and limited store closures resulted in healthy SSSG
- Product portfolio resistant to redundancy from vagaries of fashion trends and seasonality (round-the-year relevance)
- Given that bottom-wear is a 'core essential', demand for our products is consistent which results in limited discounting and higher full-price sales

Same Store Sales Growth (in %)



SSSG for FY21 & FY22 is not comparable due to CoVID related lockdowns

Full Price Sale (% of EBO Sales)





EXTENSIVE PROCUREMENT BASE WITH HIGHLY EFFICIENT AND TECHNOLOGY DRIVEN SUPPLY CHAIN MANAGEMENT



Outsourced Manufacturing

- Manage an extensive sourcing network to support product development teams
- 135 suppliers and 68 job-workers spread across 12 states and UTs
- Longstanding relationship with suppliers and job-workers
- Work closely with suppliers, supervising manufacturing and conducting inspections for quality checks

Sourcing Team

- Sourcing team closely monitors suppliers and provides strict quality assurance analysis
- Regular inspections of fabrics sourced from suppliers helps consistently maintain product and service quality
- Stringent norms of quality assurance at various levels through quality control mechanisms
- Track suppliers' capacity and output to ensure production requirements are met and finished products are procured in a timely manner

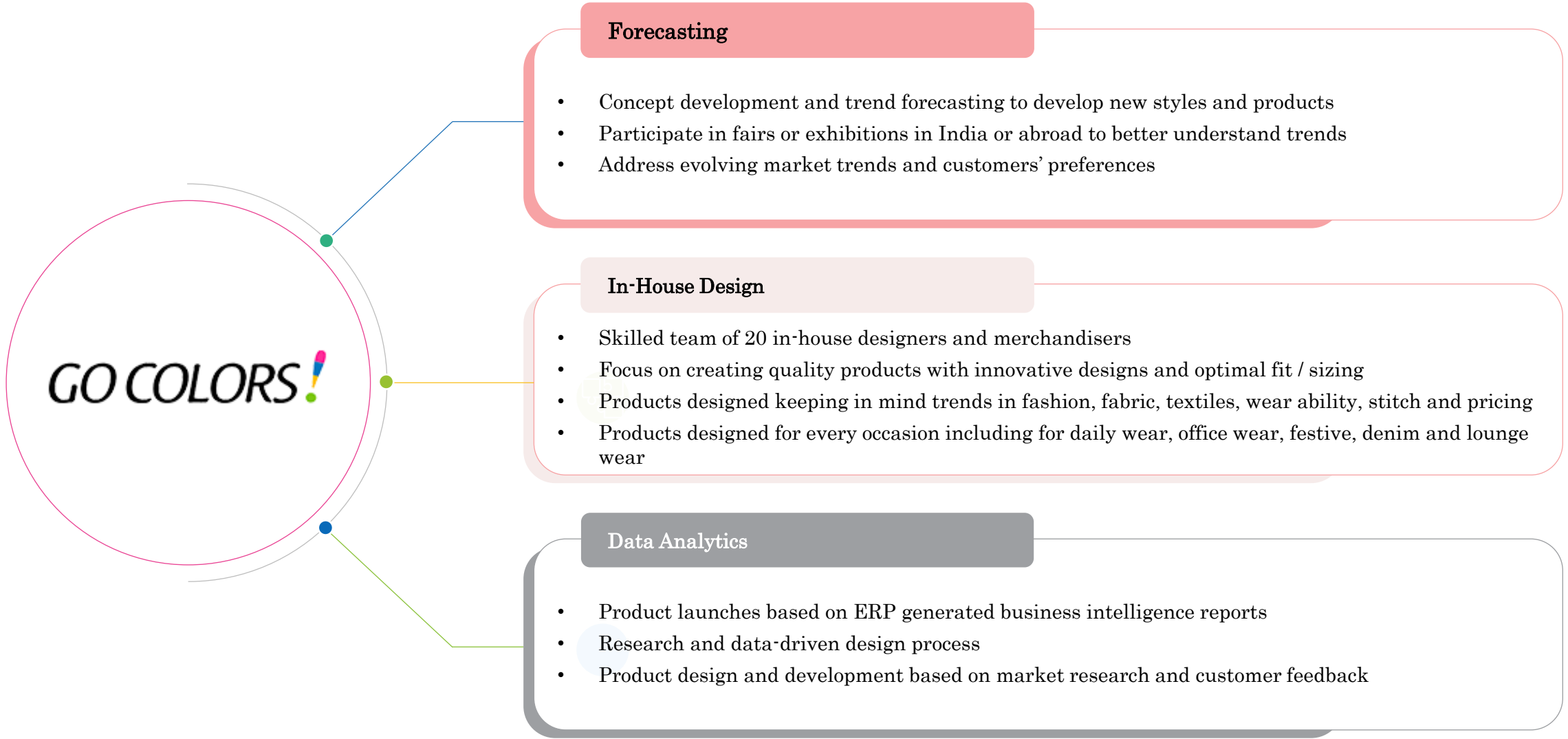
Centralized Warehouse

- Inventory, logistics and entire supply chain for all channels managed from warehouse in Tirupur, Tamil Nadu
- Warehouse spread over >99k square feet & 12K sq. ft. warehouse in Bhiwandi, Maharashtra
- Implemented end-to-end automation in inventory operations resulting in seamless and optimal inventory management
- Implemented business intelligence tool for inventory optimization, avoiding stock-out and ensuring sufficient supply at stores

Supply Chain Automation

- Entire procurement and supply chain operation automated through ERP system
- Helps maintain flexibility while meeting requirements in an efficient manner without relying on any one vendor, supplier or factory
- Procurement needs streamlined avoiding over or under-stocking
- SCMS & internal controls minimize product shortage and occurrence of out-of-stock events enabling efficient operations and high productivity

GO COLORS!





Mr. Prakash Kumar Saraogi
Managing Director

- Promoter of Go Fashion (India) Limited
- >28 years of experience in garment manufacturing, the fashion industry, and retail industry
- Holds a bachelor's degree in chemical engineering from Anna University, Chennai



Mr. Gautam Saraogi
Executive Director and CEO

- Promoter of Go Fashion (India) Limited
- >10 years of experience in consumer retail, marketing, brand building and garment manufacturing
- Holds a bachelor's degree in commerce from University of Madras and an executive diploma in marketing management from Loyola Institute of Business Administration, Chennai
- Has received a token of appreciation for his contribution to the Chennai Retail Summit 2018



Mr. R Mohan
Chief Financial Officer

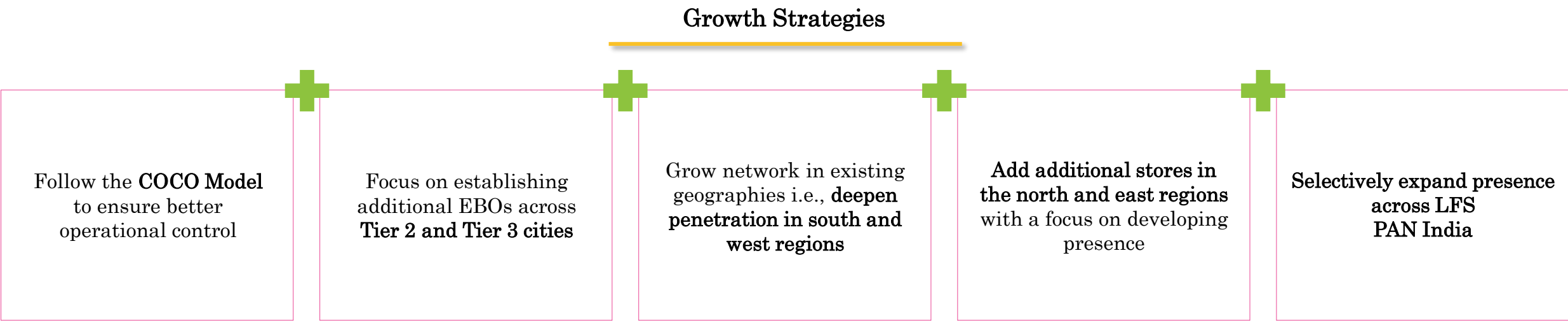
- Chartered Accountant by profession and has been associated with our Company since 2019
- Holds a bachelor's degree in commerce from Bharathiar University and is a member of the ICAI since 1991
- Served as the chairman of the Coimbatore Branch of Institute of Chartered Accountant India from 2000 to 2001
- Member of economic affairs and taxation panel of Confederation of Indian Industry, Coimbatore from 2016 to 2017



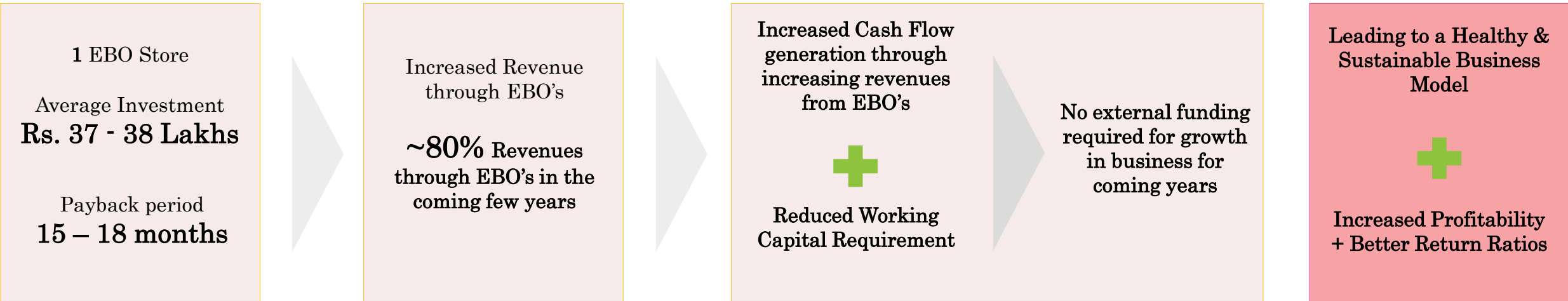
- 1 Continue to Expand Retail Network with a **Focus on EBOs**
- 2 Grow Sales Through **Online Channel**
- 3 Leverage Technology to Bring Cost Efficiency and **Enhance Customer Experience**
- 4 Leverage Leadership Position in **Women's Bottom-Wear**



1. CONTINUE TO EXPAND RETAIL NETWORK WITH A FOCUS ON EBOs



Plan to expand by 120 – 130 EBO's every year

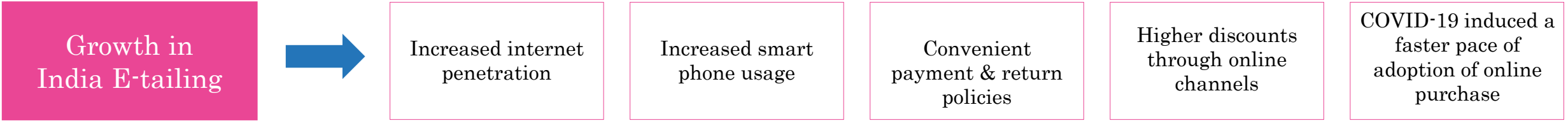




2. GROWTH THROUGH ONLINE CHANNEL



E-retail in India has witnessed rapid growth and is expected to reach ₹ 7.8 trillion by FY25 growing at 23% CAGR ⁽¹⁾



Sales from online channels for Go Fashion is Rs. 24.0 crores in FY25 (2.8% of Sales)

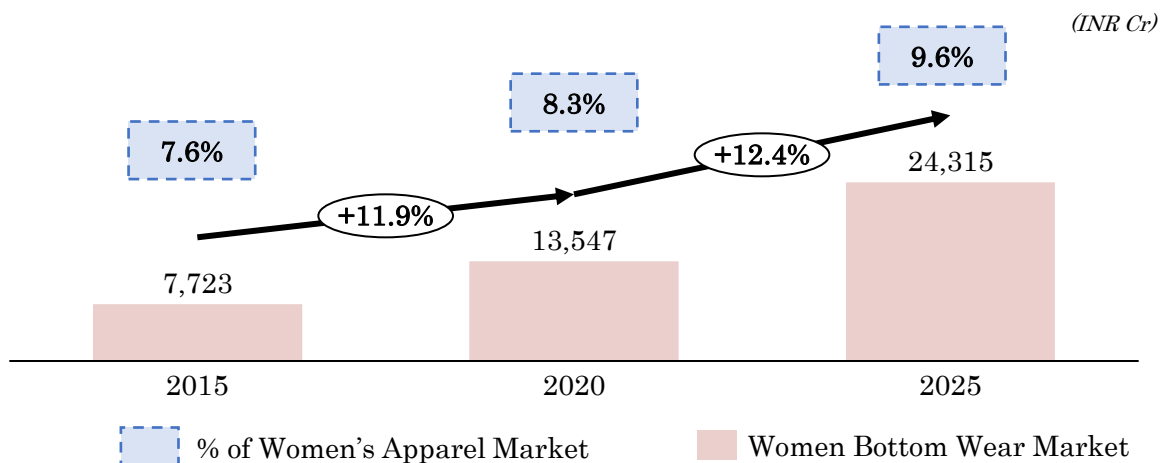
Growth Strategies



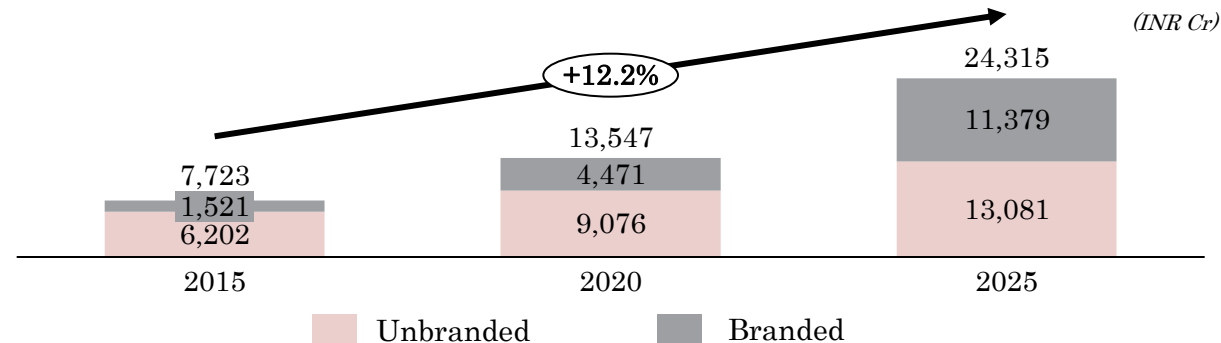
Note: (1) FY20-FY25
Source: Technopak Report

3. LEVERAGE LEADERSHIP POSITION

WBW market expected to grow at **12.4% CAGR** reaching **Rs. 243 Bn** by FY25



Branded women's bottom-wear market expected to see continued high growth in future



From 2020-25 Share of Branded WBW expected to Grow at **20.5% CAGR** v/s **7.4% CAGR** of Unbranded WBW Segment

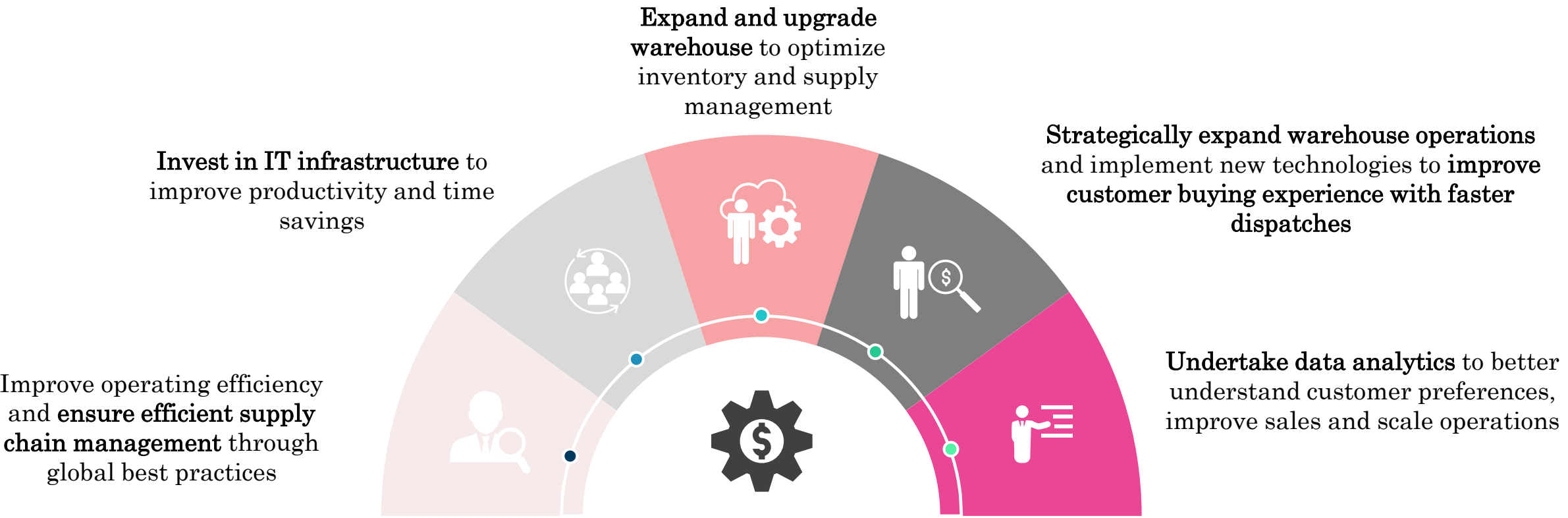
Go Colors has the **early mover advantage** in exclusive bottom-wear category with **8% market share**

With relatively low organized / branded penetration and modern women's growing disposable income, branded WBW market is expected to reach Rs. 114 billion in FY25

Shift from unorganized to organized sector
Positioned to benefit from growth given the fragmented nature of the industry

Scope for Expansion
WBW is a horizontal category enabling multiple extensions and new products
Expand into loungewear, a work-from-home collection, athleisure and other new products
in the ethnic, western and fusion wear segments

Leverage Technology to Bring Cost Efficiency and Enhance Customer Experience



2016

'Images Retail Award'

Most admired retailer of the year –
Concept Stores



2019

Transforming India Retail Award



2019

'Sustaining Enterprise of the Year' at the TIECON, Chennai

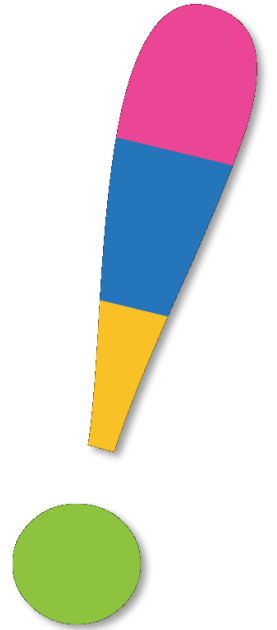


2022





Financials





HISTORICAL PROFIT & LOSS ACCOUNT STATEMENT

Particulars (in Rs. Crore)	31-Mar-25	31-Mar-24	31-Mar-23	31-Mar-22*	31-Mar-21	31-Mar-20
Total Revenue	848.2	762.8	665.3	401.3	250.7	392.0
Cost of Materials Consumed	311.4	291.9	261.6	160.2	104.0	157.6
Gross Profit	536.8	470.9	403.6	241.1	146.7	234.5
Gross Margin	63.3%	61.7%	60.7%	60.1%	58.5%	59.8%
Employee Cost	160.2	130.2	102.6	73.1	61.5	62.0
Other Expenses	108.6	98.2	88.8	45.8	38.9	46.0
EBITDA	268.0	242.4	212.3	122.2	46.3	126.5
EBITDA Margin	31.6%	31.8%	31.9%	30.5%	18.5%	32.3%
Other Income	25.4	17.3	11.9	20.8	31.6	4.8
Depreciation	123.7	110.4	87.1	71.8	60.5	46.6
EBIT	169.7	149.4	137.1	71.2	17.4	84.8
Finance Cost	46.4	39.1	28.5	23.3	20.6	16.5
Profit before Tax	123.3	110.1	108.7	47.9	-3.2	68.3
Tax	29.8	27.4	25.9	12.3	0.4	15.7
PAT	93.5	82.8	82.8	35.6	-3.6	52.6
PAT Margin	11.0%	10.9%	12.4%	8.9%	-1.4%	13.4%
EPS (in Rs.)	17.3	15.33	15.33	6.74	-0.68	10.08

HISTORICAL BALANCE SHEET STATEMENT

EQUITY AND LIABILITIES (in Rs. Cr)	31-Mar-25	31-Mar-24	31-Mar-23	31-Mar-22*	31-Mar-21	31-Mar-20
Equity						
Share Capital	54.0	54.0	54.0	54.0	79.0	79.0
Other Equity	643.4	549.9	466.4	384.4	203.9	207.3
Total Equity	697.4	603.9	520.4	438.4	282.9	286.3
Liabilities						
Non Current Liabilities						
Lease liabilities	416.6	393.4	274.6	177.7	217.3	179.4
Provision	6.1	5.1	5.1	2.9	2.1	1.4
Total Non Current Liabilities	422.8	398.5	279.7	180.6	219.4	180.9
Current Liabilities						
Borrowings	0.0	0.0	0.0	0.0	10.4	2.8
Lease liabilities	90.4	75.7	64.9	72.1	4.6	27.4
Trade payables	31.6	36.8	36.2	17.7	10.7	10.5
Other financial liabilities	23.6	21.0	17.5	3.2	3.4	2.9
Current tax liabilities (net)	3.9	1.3	3.6	4.7	1.8	0.0
Other current liabilities	8.2	4.1	2.4	30.6	11.6	5.3
Provisions	2.6	0.6	2.3	3.9	3.4	3.2
Total Current Liabilities	160.2	139.6	126.8	132.2	46.0	52.0
TOTAL EQUITY & LIABILITIES	1,280.3	1,142.0	927.0	751.2	548.4	519.2

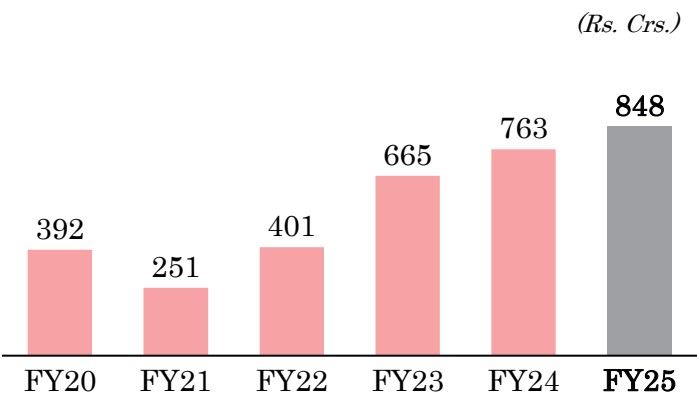
ASSETS (in Rs. Cr)	31-Mar-25	31-Mar-24	31-Mar-23	31-Mar-22*	31-Mar-21	31-Mar-20
Non Current Assets						
Property, plant and equipment	111.7	101.3	85.0	64.1	58.4	60.3
Capital work-in-progress	11.5	10.9	7.4	226.7	8.6	8.1
Intangible assets	0.8	0.9	0.7	8.7	0.5	0.7
Right-of-use assets	447.5	424.5	308.0	0.4	200.6	194.7
Financial Assets						
Other financial asset	40.2	36.1	54.9	24.0	23.7	20.3
Deferred tax assets (net)	31.7	23.4	16.8	11.4	7.6	5.6
Other non-current assets	1.3	2.1	2.6	1.0	4.3	1.3
Total Non-Current Assets	644.5	599.1	475.4	336.3	303.7	291.0
Current Assets						
Inventories	237.6	215.9	230.3	165.9	80.9	105.9
Financial Assets						
Investments	9.7	6.1	21.7	45.9	46.4	8.9
Trade receivables	105.7	79.8	72.2	60.2	47.1	55.6
Cash and cash equivalents	16.1	15.7	33.7	42.4	13.2	0.1
Bank balances other than cash	222.2	176.4	53.5	63.4	26.5	32.4
Other financial asset	13.6	17.3	11.5	11.2	7.1	5.5
Current tax assets (net)	0.0	0.0	0.0	0.0	0.0	1.8
Other current assets	30.7	31.8	28.7	26.0	23.3	18.0
Total Current Assets	635.8	542.9	451.6	415.0	244.6	228.2
TOTAL ASSETS	1,280.3	1,142.0	927.0	751.2	548.4	519.2



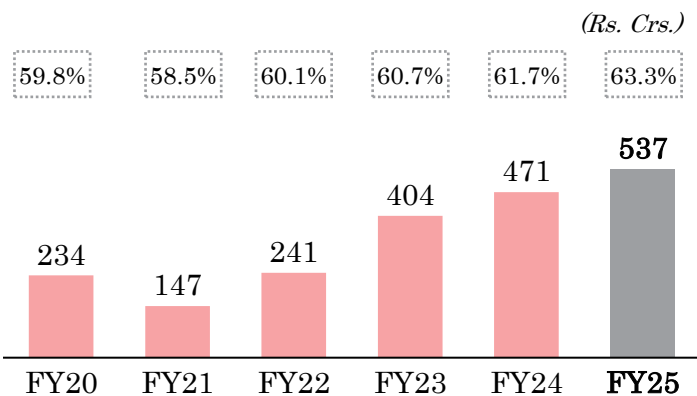
DEMONSTRATED TRACK RECORD OF STRONG PERFORMANCE



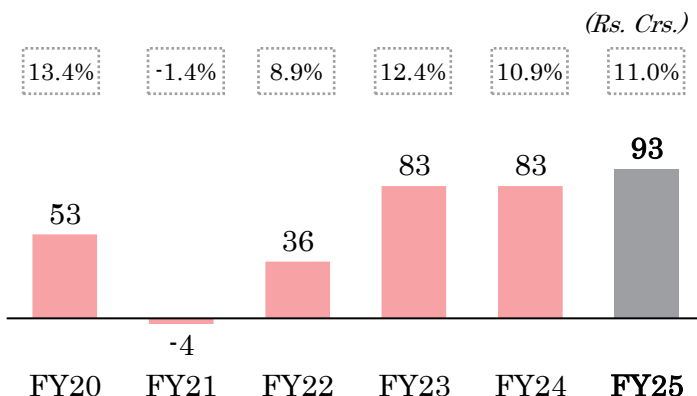
Revenues



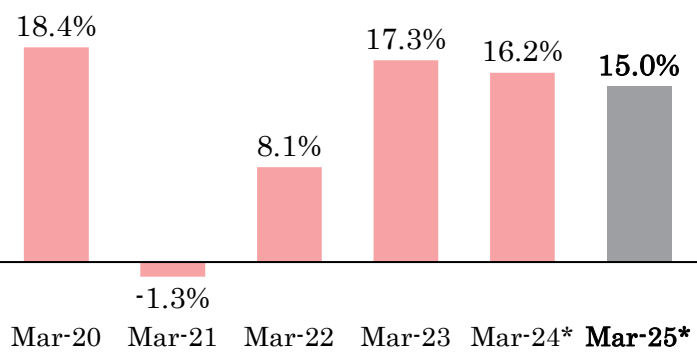
Gross Profit & GP Margins



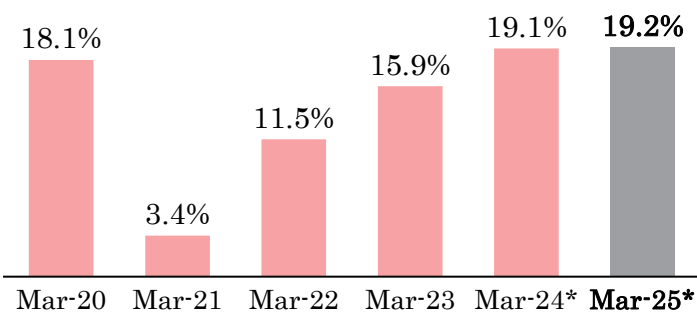
Profit After Tax & PAT Margins



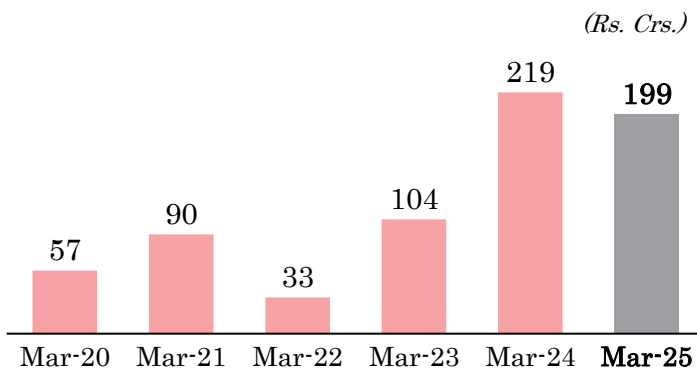
*Return on Equity (RoE)



*Return on Capital Employed (RoCE)



Cash Flow from Operations



Note - FY21 & FY22 Financials Impacted on account of CoVID-19 induced lockdowns

* ROCE and ROE are calculated without taking the Impact of IND-AS 116



THANK YOU!

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