Hemas Holdings PLC

Investor Presentation

First Nine Months ending December 31, 2021 – Q3 FY 2021-22

Our Portfolio

Consumer Brands	Healthcare	Mobility
• Home and Personal Care - Sri Lanka *(HPC SL)* • Home and Personal Care - International *(HPC Int)* • Learning Segment - *Atlas*	• Pharmaceutical Import, Marketing and Distribution • Pharmaceutical Manufacturing - *Morison* • Hospitals	• Maritime • Logistics • Aviation

73	USD **199**mn	USD **165**mn	USD **358**mn	**AAA**	**15**	**>4.5k**	**34%**
Years in Operation	Market Capitalization	Total Equity	Total Assets	Long-term Fitch Rating	Export Destinations	Employees	Free Float

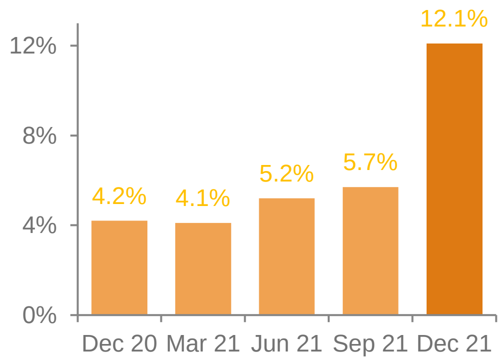
Note: As at December 31, 2021

Macroeconomic Snapshot of Sri Lanka

Inflation

Colombo Consumer Price Index (CCPI) reached a record high of 12.1% YoY in December on the back of accelerated food prices.

YoY CCPI Index Movement
(%)

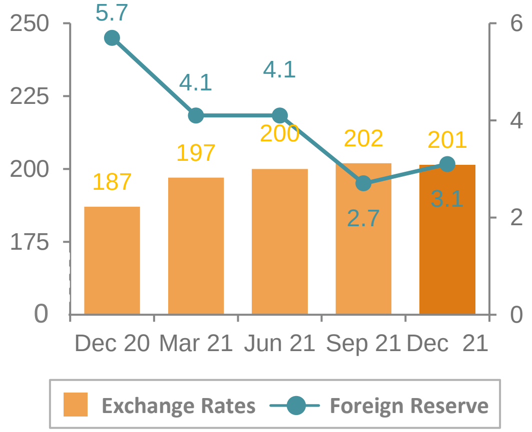


Sources : CBSL

LKR Depreciation

After a three-month downward trend, official reserves were reported at Rs 3.1 Bn in December covering ~ 2.0 months of imports.

Monthly Average Exchange Rate** (USD/LKR) **&
Foreign Reserve Balance (USD Bn)

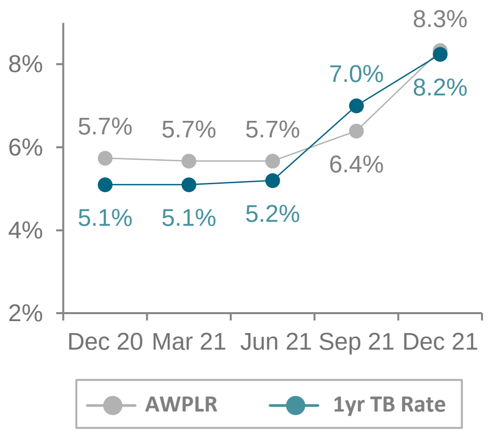


Sources : CBSL and tradingeconomics.com

Interest Rate

AWPLR is continuously on the rise with the expectation of CBSL increasing policy rates.

Monthly AWPLR & 1yr TB Rate (%)

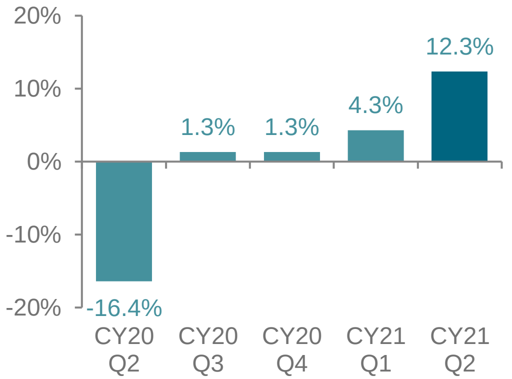


Sources : CBSL

GDP

GDP for Q2 2021 picked up 12% YoY owing to the lower base in Q2 2020, which was impacted by the first COVID lockdown.

GDP Growth (%)



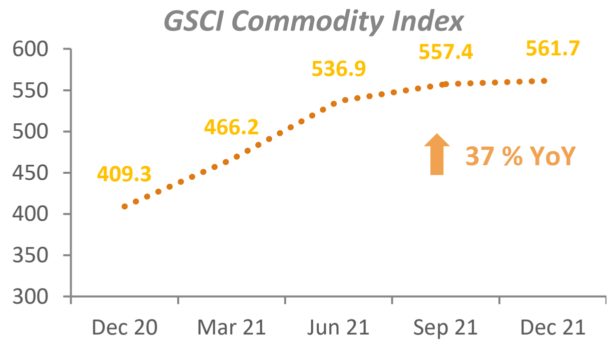
Sources : CBSL

CY: Current Year

High Impact | Medium Impact | Low Impact

Macroeconomic Snapshot Continued..

Commodity Price Hike



Sources : Nasdaq.com

Global economic recovery and supply disruptions (including freight rates) have resulted in a sharp escalation in commodity prices.

Palm Oil (USD/MT)	*Crude Oil (USD/BBL)*	*Paper & Plastic Prices (USD/MT)*
Prices 30% ↑ Dec 20 – Dec 21:	Prices 49% ↑ Dec 20 – Dec 21	Plastic Prices: 3% ↑ Paper Prices: 52% ↑ Dec 20 – Dec 21

Sources : World Bank, Company records

COVID-19 Update

Total confirmed cases 613,478

Total Deaths 15,492

38% **Booster Dose %** % out of population vaccinated with 2 doses

79% Vaccinated with 2 doses as a % of over 12 years population

83% **Vaccinated with 2 doses % at Hemas**

Sources : Ministry of Health, Company records

Note :COVID-19 update as of February 02, 2022

Pandemic Driven Volatility

- Supply chain disruptions
- Continuously increasing freight rates
- Disruption due to high number of COVID patients
- USD liquidity constraints
- Travel ban impacting tourism

High Impact | Medium Impact | Low Impact

Our Strategic Building Blocks – Q3 FY 2021-22

MORE FROM THE CORE

Accelerate current business efforts to drive higher value in core business

- **HPC SL :** Launched floral variants of washing powder and washing liquid for baby laundry under Baby Cheramy.
- **HPC SL:** Line extensions introduced for Baby Cheramy herbal lotions.
- **Atlas:** Introduced triangular colour pencils for enhanced grip.
- **Atlas:** *Sip Savi* – A virtual panel discussion was conducted to raise awareness of 22k+ kids who dropped out of school due to financial difficulties.
- **Pharma:** Launched 28 new pharmaceutical products and 43 new surgical/ diagnostic products in partnership with existing principals.

NEW WITHIN THE CORE

Capturing new revenue streams to further strengthen the core

- *'New revenue'* stood at 6.0% out of total Group revenue.
- **HPC SL :** Launched the salon channel operation
- **Atlas**: Relaunched 'Innovate' to penetrate the premium segment and relaunched Atlas pastels with improved stick width.
- **HPC INT:** Launched 'Actisef Nourish' enriched with milk protein which keeps the skin soft.
- **Pharmaceutical Distribution:** Registered one new principal addressing high demand therapeutic classes.

ADJACENCIES

Attractive adjacencies to target for breakout growth

- **HPC SL** : Introduced a range of skin care products to salons under the 'Swa' brand name.
- **Hospitals**: Post COVID clinics were introduced offering post COVID screening packages

EFFICENCY AND PRODUCTIVITY

Efficiency and productivity to further enhance capacity and improve growth

- **Hospitals :** *5S and Kaizen initiatives. Strong digital presence – EHR and ongoing initiatives with IFC.*
- **HPC SL :** *Ongoing Total Productive Maintenance (TPM) initiatives leading to annual savings.*
- **Atlas :** *Initiatives on SFA, Lean initiatives targeting cost savings, Initiatives on auto generated dash boards.*
- **Pharma:** Commenced providing analytics and automation support to warehouse teams

DRIVERS

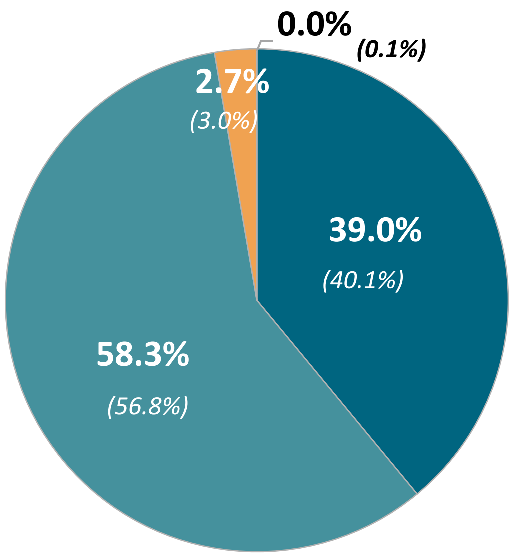
- Create sustainable and competitive advantage
- Drive growth
- Generate value
- Building high performance teams

Financial Snapshot of the Group

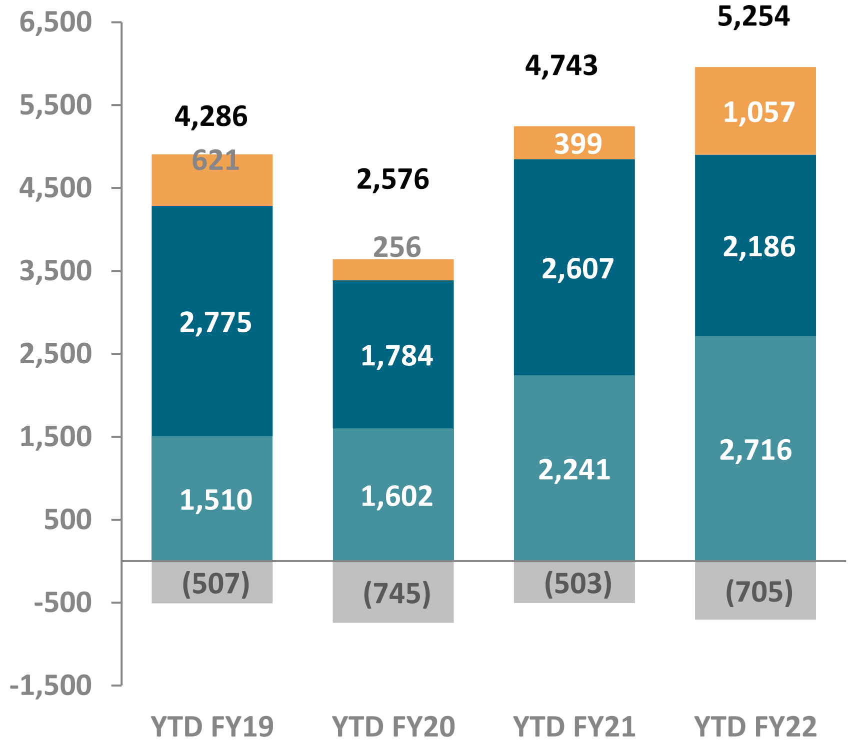
YTD FY 2021-22

Revenue	LKR 57.7Bn	↑ 20.5%
EPS	LKR 5.34	↑ 33.2%
Operating Profit	LKR 5.3Bn	↑ 10.8%
Debt-Equity Ratio	24.9%	↓ -5.0%
Earnings	LKR 3.2Bn	↑ 33.1%
ROCE	17.6%	↑ 2.1%

Group Revenue by Segment
YTD FY 2021-22



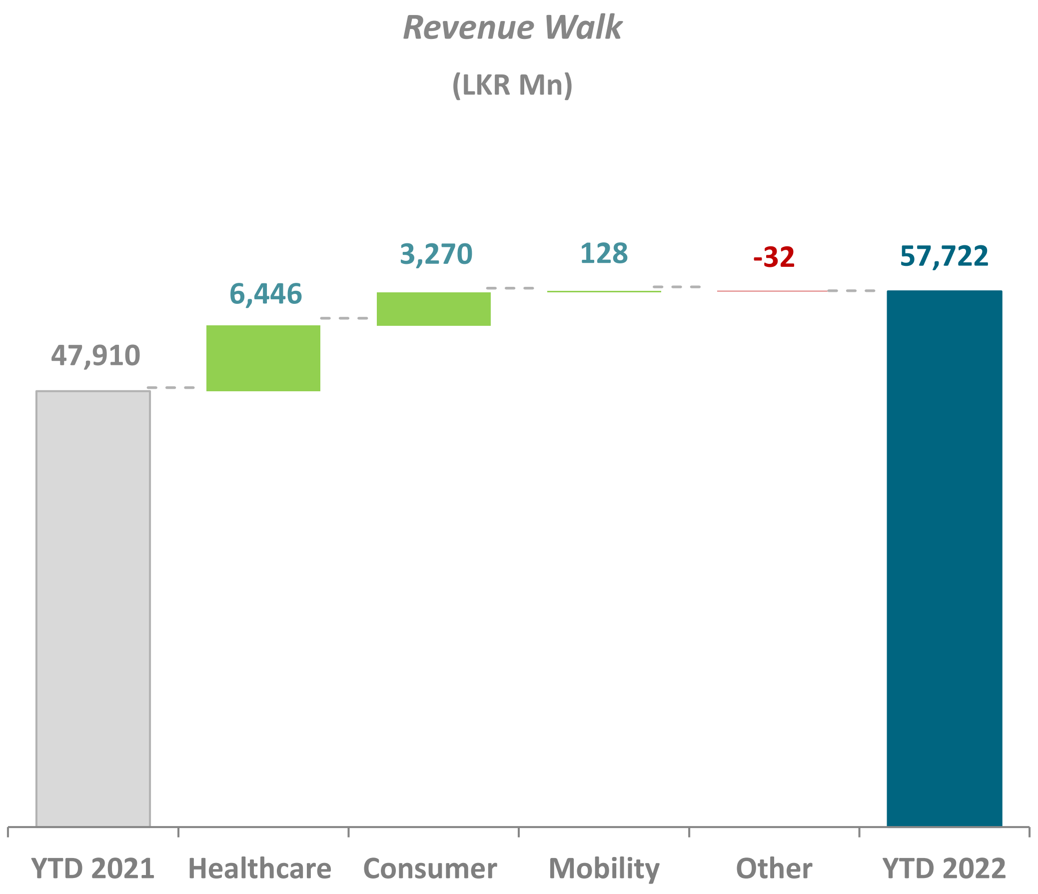
EBIT by Segment
YTD FY 2021-22
(LKR Mn)



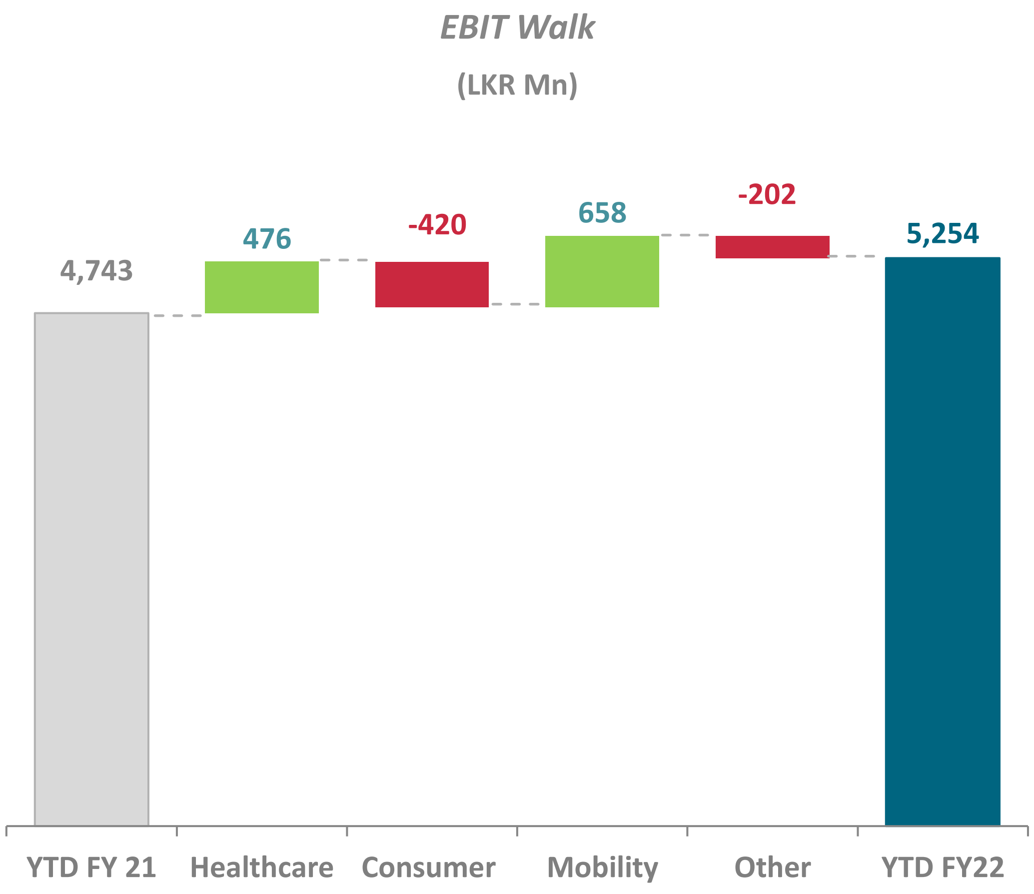
Healthcare Consumer Brands Mobility Other

Notes: The 'other segment' includes the corporate office and remaining leisure assets
Figures in brackets indicate last year contribution %

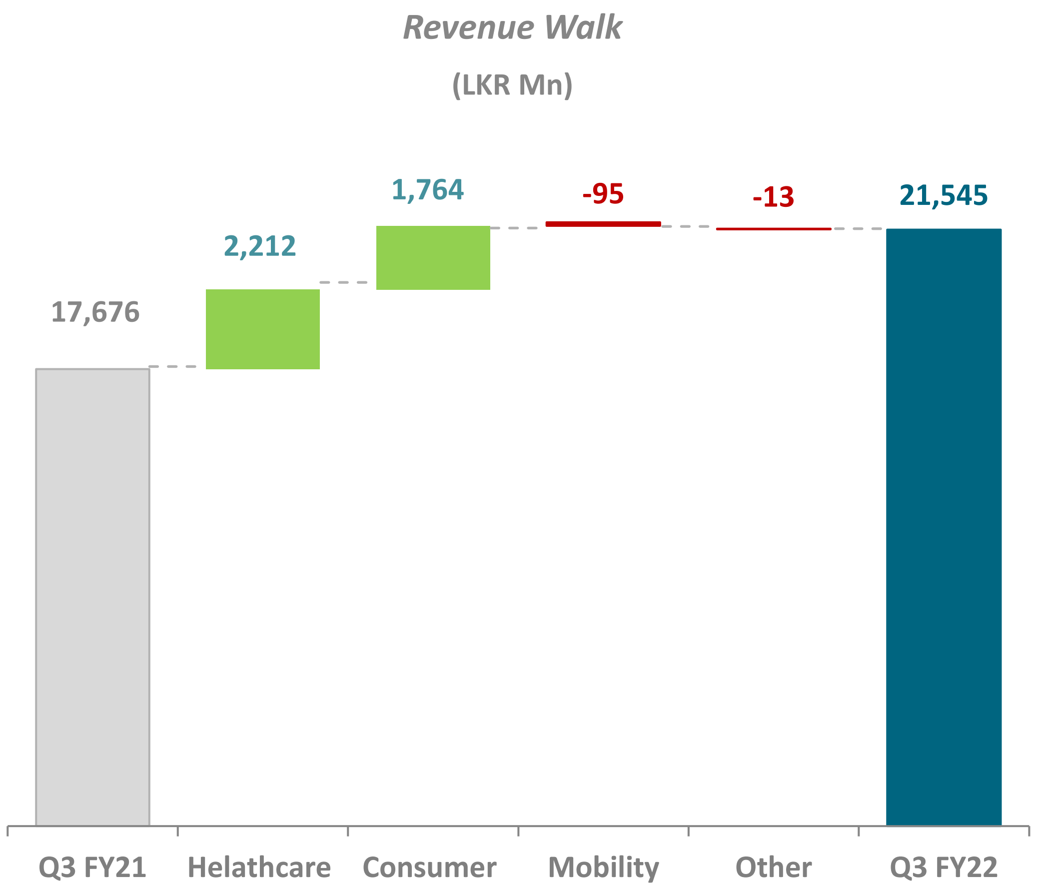
Sector Performance Summary – YTD FY 2021-22



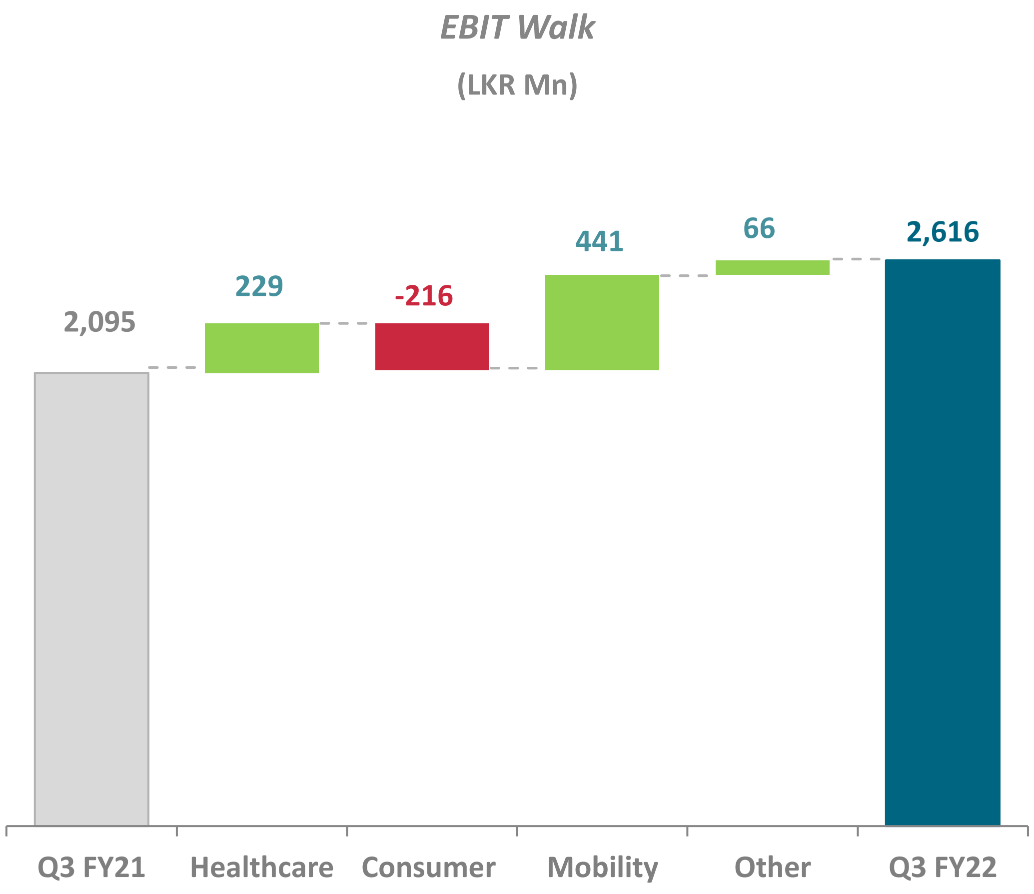
Note: The 'other segment' includes the corporate office and remaining Leisure assets



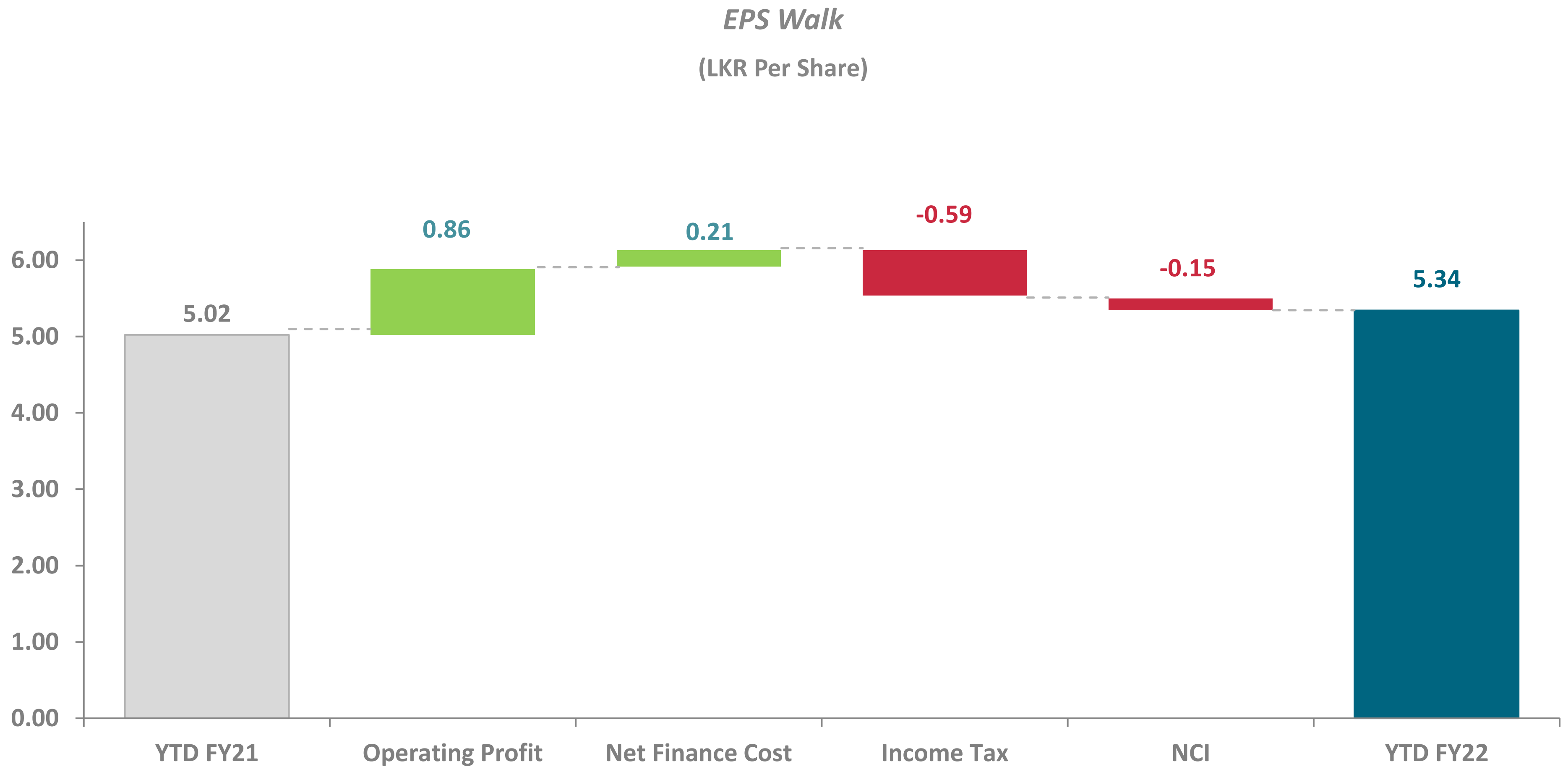
Sector Performance Summary – Q3 FY 2021-22



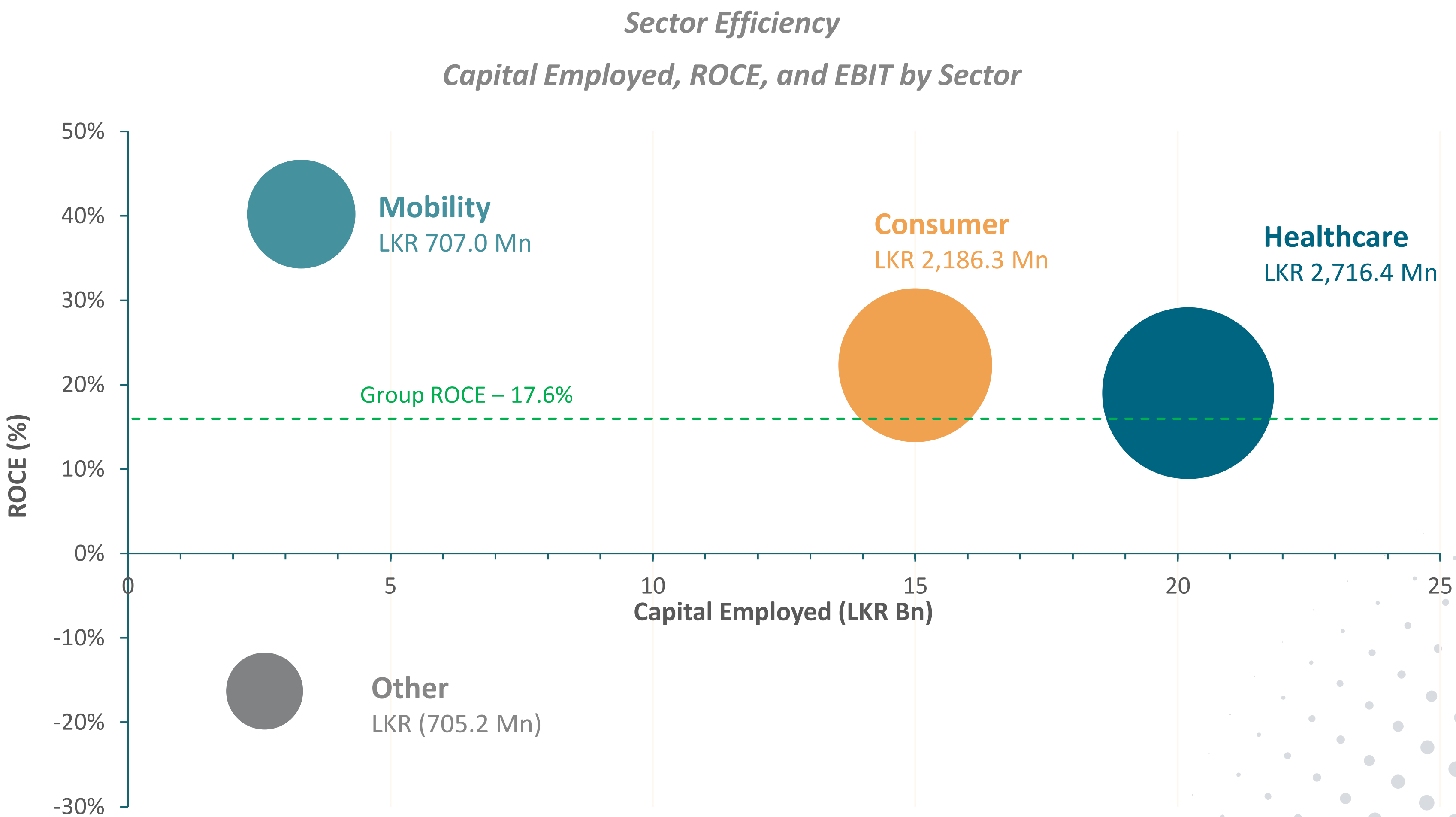
Note: The 'other segment' includes the corporate office and remaining Leisure assets



Continuing Operation EPS



Capital Employed – YTD FY 2020-21



Note:
The size of the circle indicates the EBIT values
The 'other segment' includes the corporate office and remaining leisure assets
Mobility sector figures excluding logistics and gains from divestment

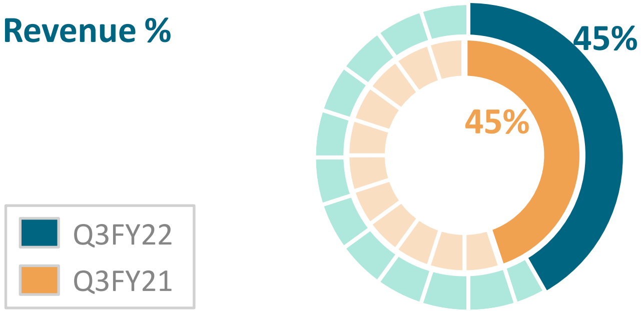
Consumer Brands

- Home and personal care – Sri-Lanka
- Home and personal care – International
- Learning Segment

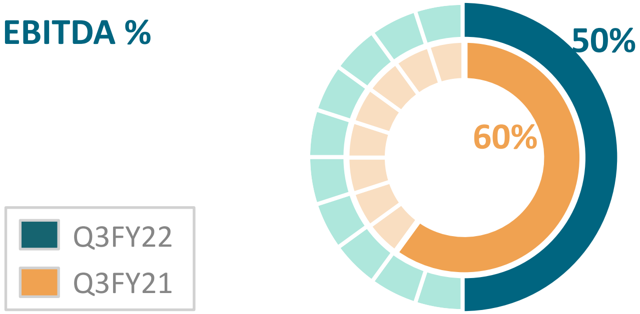
Consumer Brands

Contribution to Group

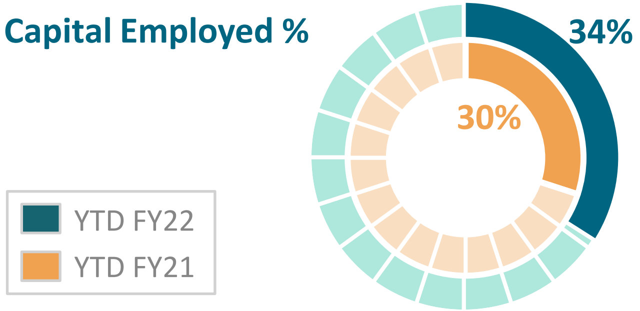
Revenue %



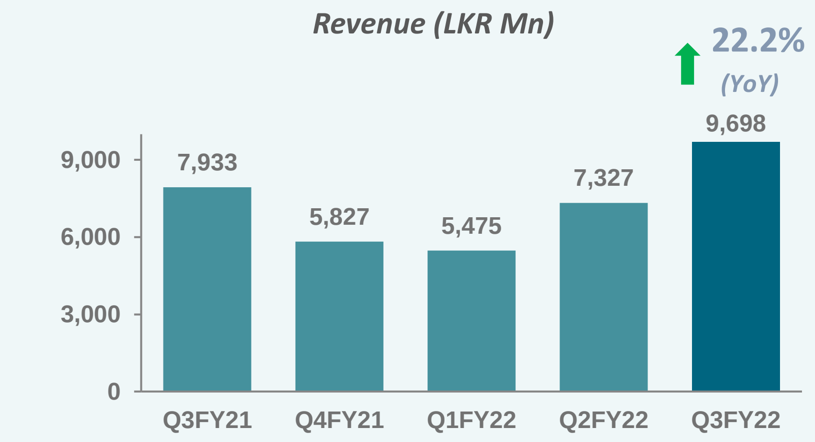
EBITDA %

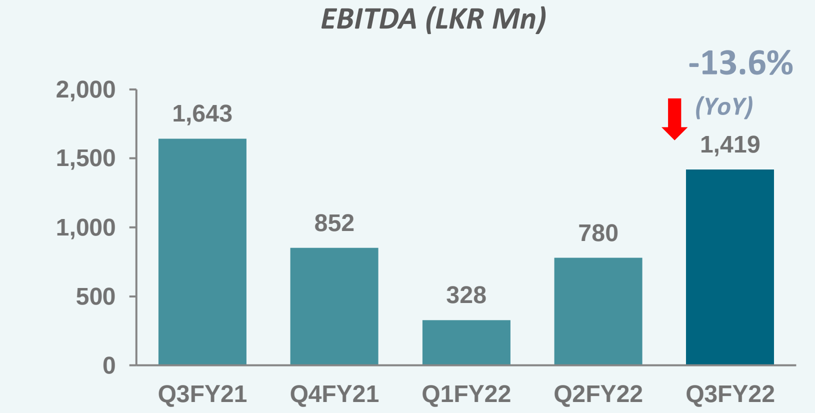


Capital Employed %



Sector Performance – Q3 FY 2021-22





Key Highlights

- The pandemic continued to influence consumer behaviour, sales mix and market channels.
- Resulting from lower infection rates, quarter was a near ‘normal’ quarter with minimal disruptions to trade and operations.
- Revenue contribution mix within the sector remained in line with last year with contribution from Atlas being higher.
- Atlas seasonality led to QoQ (Quarter on Quarter) revenue growth.
- New revenue from recent launches and relaunches stood at 9%.
- Margins were under pressure with commodity inflation and challenges around foreign exchange liquidity.
  - Pricing continues to step up in response to growing inflation.

Home and Personal Care – Sri Lanka

8 Key categories with market leading positions

Entered the 'Salon Channel' with '*Swa*'

8% Full term volume growth

80k+ Direct outlet coverage

59% YTD contribution to consumer revenue

Purpose-driven brands touching the lives of the Sri Lankan consumer

Inclusive Parenting
Both parents coming together for the best care for baby

Baby Cheramy

Strong roots Stronger together
strengthening family bonds through good practices passed down

Clogard

Celebrating & Nurturing SL Beauty

Kumarika

Make a Positive Difference by **investing in Yourself**

Velvet

Enabling Women to be future-ready

Diva

Home and Personal Care Sri Lanka: Strong Brand Portfolio

#1
In Hair Oil

#1
In Beauty Soap

#1
In Baby Care

#2
In Feminine Care

#2
In Laundry Care

#2
In Oral Care

Beauty Care

Hygiene Care

Female Fragrances

Male Grooming

Shampoo

95% of business where Hemas is among the Top 3 players

Presence in all modern trade chains and outlets

98% of households reached by Hemas brand

Strong 3rd party manufacturing partnerships

New partners such as Garnier, L'Oreal and Nivea

Our Consumer Health Brands

Skincare

Baby Care

Cold and Flu

Home and Personal Care – International

2 Geographies
Bangladesh & West Bengal

2 Key categories
Health soap category—**Actisef**

12% Market share in VAHO (Bangladesh)

270k+ Retailers reached in Bangladesh

9% YTD contribution to Consumer Brands revenue

Note: VAHO – Value Added Hair Oil, CNO – Coconut Oil

Locally led and localized in Bangladesh

- All products are exclusively designed for Bangladesh.
- We have a local leadership team with 90% local talent.
- *Kumarika* Hair Oil has been relaunched in Mar-21 with an improved USP and design and made 17.3% penetration in Bangladesh.
- Hemas has entered the Value Added CNO Segment in Sep-21. Launched a new brand *Eva*, with unique proposition.

Reach in Bangladesh

19.0% Rural penetration by Hemas

17.3% 7.2Mn Households — of households reached by Hemas

100% On-shore manufacturing

12.5% Urban penetration of Hemas

Source: Penetration as per Household Panel data – Kantar – Jun-21.

Home and Personal Care – Sri Lanka and International

Sri Lanka

Revenue

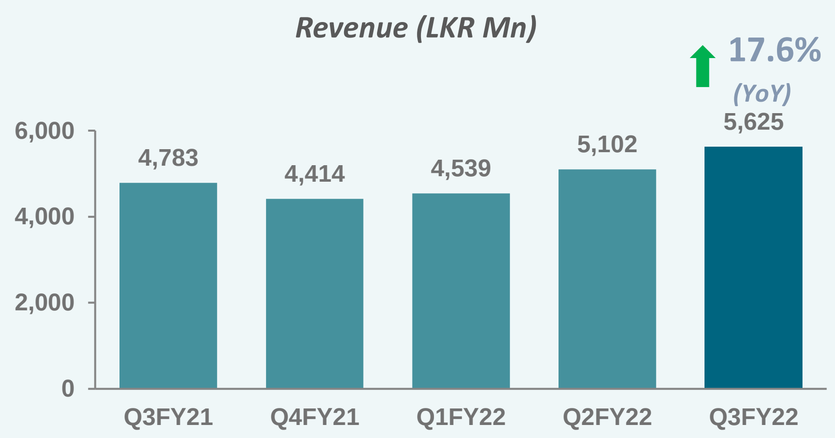
- Increased market shares in the larger Personal Care space such as hair and toothpaste.
- Delivered a steady volume-led growth across both modern and general trade channels compared to last year.
- Over 13% of revenue from new launches and relaunches.

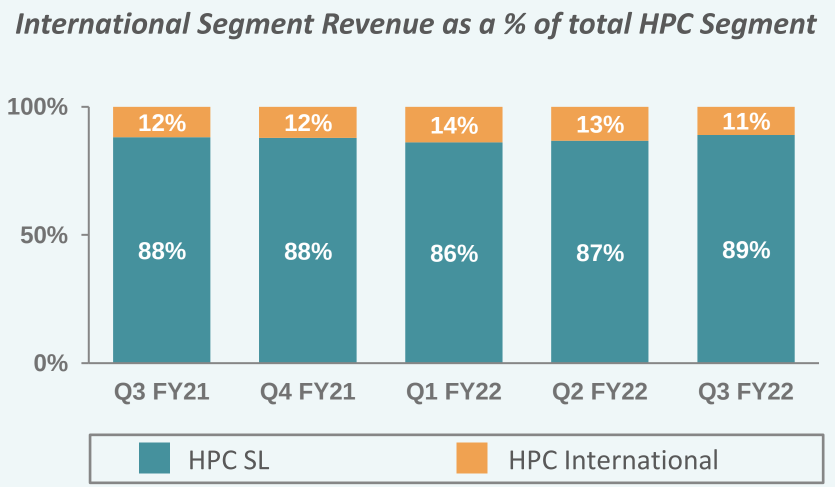
Profitability

- Over 10 % gross profit margin erosion due to raw material cost escalation and exchange rate depreciation.
- Adopted multiple strategies to mitigate the impact of inflationary headwinds whilst continuing to prudently manage cost.

Outlook

- We are cautious of the rising inflation and the resulting household consumption patterns on essential and non-essential items.
- Margins will continue to be under pressure due to increased commodity prices.





International

Revenue

- HPC Bangladesh witnessed double digit revenue growth whilst profitability growth remained stable due to improved market conditions in the first two months.
- Revenue contribution from new products in Bangladesh stood at ~ 17%.

Profitability

- Amidst the rising commodity inflation and constant revenue, profitability growth was driven by efficiency improvements.

Outlook

- Current growth momentum in Bangladesh to recover volumes.
- Recent launch, *Eva hair oil* is expected to pick up momentum.
- Margins will continue to be under pressure due to commodity price increase.

Learning Segment

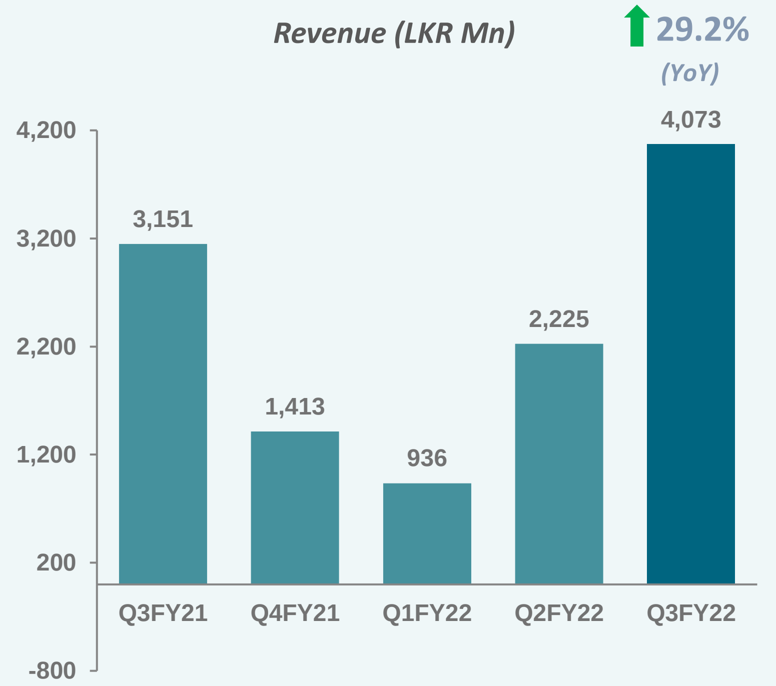
6 Key categories

High Efficiency and productivity through lean initiatives

Market leader in key product categories

50k Outlet coverage across Sri Lanka

32% YTD contribution to Consumer Brands revenue



Revenue

- Atlas continued to gain market share across all key categories including books and colour products over last year.
- Market share within the premium books category was doubled with the relaunch of the Innovate Brand.

Profitability

- Margins were under pressure with the current challenges in the FOREX market.

Outlook

- We expect Atlas to recover to pre-COVID levels with schools reopening.
- Margins will be challenged due to exchange rate pressure.
- Internal efficiencies on lean management will negate the impact to an extent.

Atlas: Where We Inspire the Next Generation to Unleash Their Potential

"We provide tools, content and experiences which will enable the next generation to unleash their potential"

KIDS

Catering to all stationery and back to school needs

Young/Adults

Growing market due to greater focus on higher education &stationery as a lifestyle product

Office

Providing one stop professional stationery solutions

Institution

Service oriented approach

Atlas

- Our story started over 60 years ago in September 1959
- Business continues to drive the lean manufacturing agenda
- Focuses on brand building and premiumization and on extending to emerging markets.

Creating A Purpose Based Brand Experience

Facilitating Learning

Assisting Learning

Carefully Crafted Brand Portfolio in Line with Growth Areas

Atlas was crowned the school supply brand of the year at SLIM people's awards 2021.

New Product Launches during the Quarter

Home and Personal Care Sri Lanka

Expanding the Baby Cheramy Portfolio

Floral Baby Laundry wash Powder and Liquid

Newborn Baby Diapers

'Bedtime' giftbox

New Variants under Herbal Baby Lotion Range

Swa Range

Home and Personal Care International

Actisef Nourish

Enriched with milk protein to keep the skin soft and smooth

New Actisef Nourish with scientifically proven 99.99% germ killing capabilities.

Learning Segment

Expanding the innovate brand

New themes under Atlas Brand

Relaunched pastel with improved stick width

Triangular colour pencils

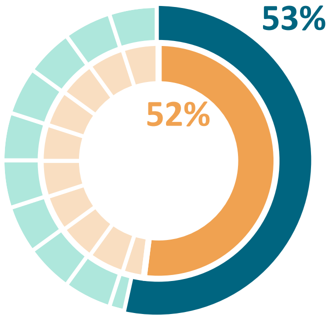
Healthcare Sector

- Pharmaceutical Import, Marketing and Distribution
- Pharmaceutical Manufacturing
- Hospitals

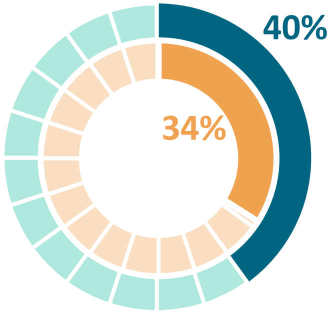
Healthcare Sector

Contribution to Group

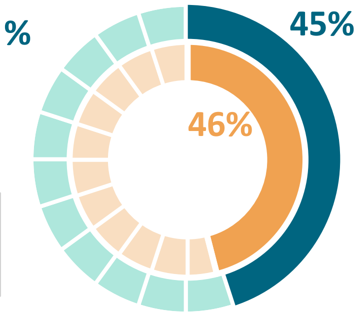
Revenue %



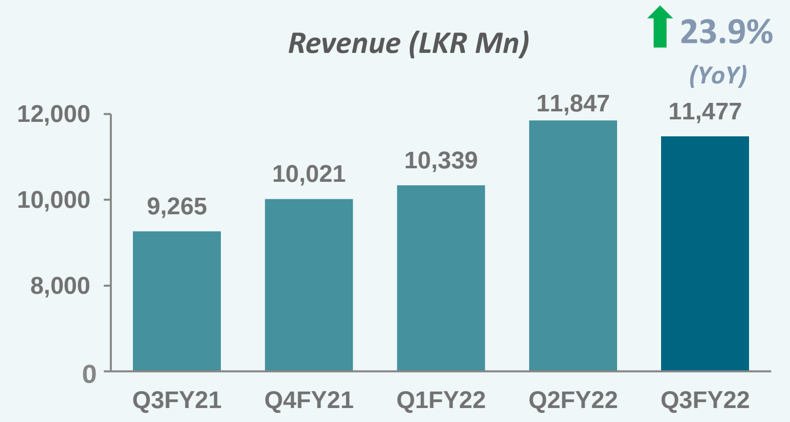
EBITDA %

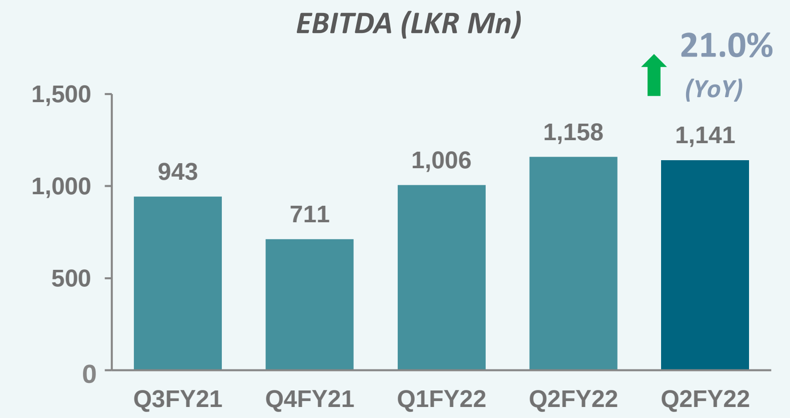


Capital Employed %



Sector Performance – Q3 FY 2021-22





Key Highlights

- Market demand for healthcare services and medicines experienced a sudden surge with the COVID cases escalating.
- Hospitals recorded a robust growth with improved surgical revenue mix and ICCs.
- Significant reduction in buy back volumes against guaranteed amounts by the Ministry of Health Sri Lanka adversely impacted overall performance.
- Profit margins continued to be impacted due to challenges around forex liquidity.
- The digital transformation programme with IFC across Hemas Hospitals and Pharmaceutical businesses is progressing well.

Post Balance Sheet Event

- Entered into a sale and purchase agreement with our joint venture partner to sell HHL's stake in Myanmar.

Pharmaceutical Import, Marketing, Distribution and Pharmaceutical Manufacturing

Pharmaceutical Import, Marketing, and Distribution

- **50+** Principals
- Private market leader In import and distribution
- Distributes: Pharmaceuticals, Surgicals & Diagnostics, leading consumer healthcare products
- **Beheth 2.0 & Healthnet** Digital connectivity & online pharmacy
- Fastest island wide product availability (within 24 hours)
- **110+** Distributors **3,100+** Pharmacies

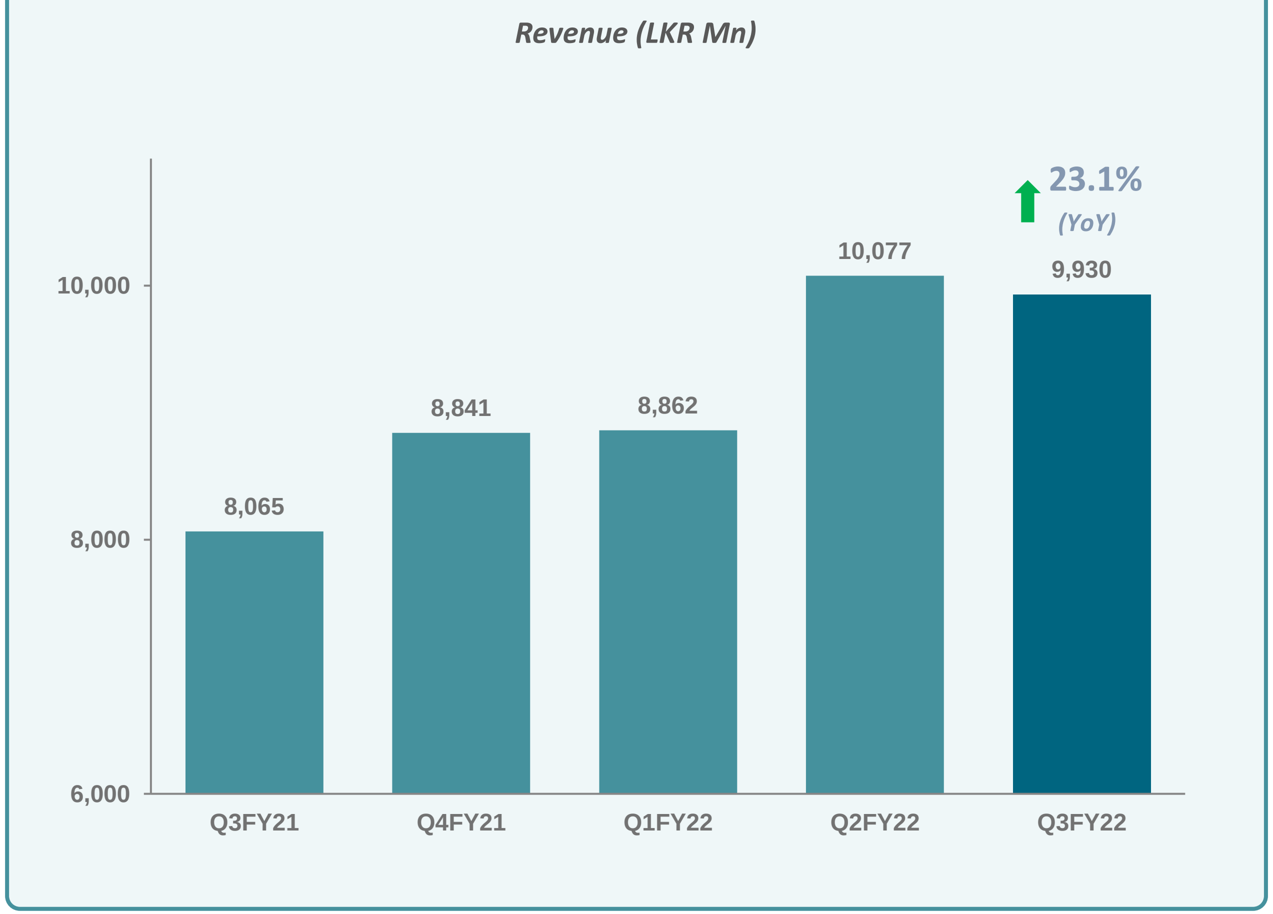
Pharmaceutical Manufacturing

- **70+** Formulations - Manufacturing
- **1st and largest EU GMP** compliant general oral solid and liquid dosage manufacturing plant
- Launched **Empamor** 1st SGLT2 drug manufactured in Sri Lanka
- **5Bn** tablets and **2Mn L** liquids Morison capacity per annum
- **#1 in volume** Highest selling SKU in the country – Morison Ascorbic Acid 100mg
- Partnering with **3** Global manufacturers

Morison Plant and Key Highlights

- NPD focused separate manufacturing line consisting of advanced technology, Partnerships with International CRO
- Minimum human interaction using latest global technology 1st zero liquid discharge effluent treatment plant in Sri Lanka
- Built in SLINTEC park in collaboration with SLINTEC for research
- Contract manufacturing opportunities lined up for leading global brands
- Largest supplier of bulk generics to the private market in volumes
- Branded Generics- Focus on premium quality at affordable prices

Pharmaceutical Import, Marketing, Distribution and Pharmaceutical Manufacturing



Revenue

- The distribution segment witnessed a double digit growth in revenue owing to steady demand.
- Manufacturing segment revenue was adversely impacted by the slowdown in government buy-back revenue.
  - Excluding the contribution from buyback contracts, Morison reported a growth of 37% in revenue by refocusing on alternative opportunities.

Profitability

- Ongoing currency volatility and liquidity constraints continued to pressurize margins.
- HHL decided to exit the investment in Myanmar due to current political turmoil in the country. profit margins continued to be impacted due to challenges around forex liquidity.

Outlook

- Commercial production at the new plant at Homagama is scheduled to commence towards the end of the financial year.
- We will be accelerating contract manufacturing, exports and other alternative opportunities to de-risk Morison from the volatility of the buyback agreements.

Hospitals

180+ Beds

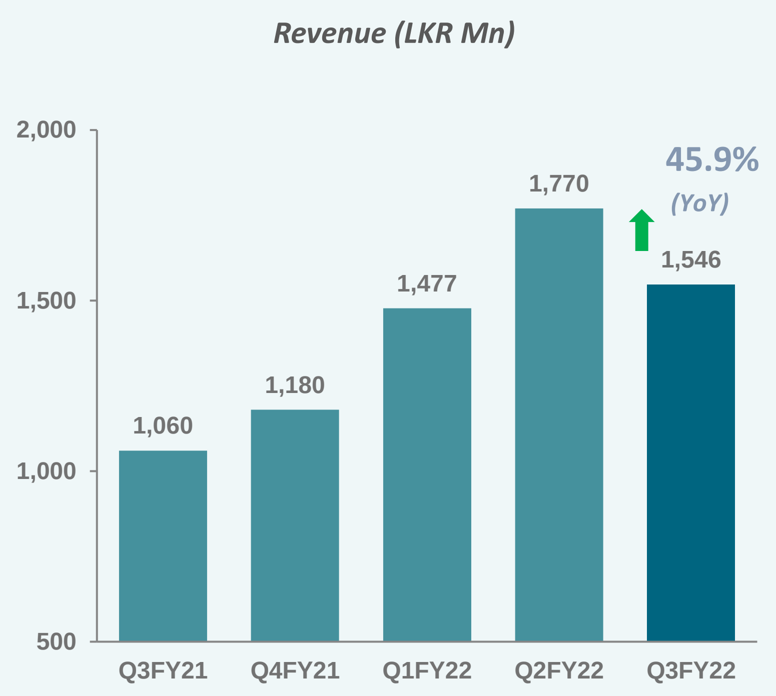
59% Hospital occupancy

First hospital in Sri Lanka to implement fully fledged EHR system

2 Hospitals

50+ Lab network

14% YTD contribution to Healthcare revenue



Revenue

- Witnessed an average increase in admission volumes by 25 % over last year.
- Focus on non-COVID-19 patients was increased, especially Non Communicable Diseases (NCDs) which translated to elective surgeries.

Profitability

- EBITDA Margins were improved by 997 bps on the back of better occupancy rates.
- The COVID ICC centers provided a steady cash flow for the segment.

Outlook

- We continue to expect the occupancy to improve with the easing of lockdown.
- OPD is expected to see significant growth with the easing of COVID restrictions.

OPD : Inpatient Rev. Mix	Q3FY21	Q4FY21	Q1FY22	Q2FY22	Q3FY22
	52%	50%	47%	49%	52%

We are the only COVID-Certified Hospital in Sri Lanka

Hemas Hospitals Highlights

Centers of Excellence:

- In vitro fertilization unit (IVF) (50 cycles in Oct-Dec 21)
- Gastrointestinal unit (GI)
- Orthopedic unit
- Urology and Kidney Care unit (26 Kidney Transplants in Oct-Dec 21)
- Dialysis unit (2,150+ Dialyses in Oct-Dec 21)
- Cosmetic unit
- Maternity unit (515+ baby deliveries in Oct-Dec 21)

"The first Internationally accredited hospitals chain in Sri Lanka by the Australian Council on Healthcare Standards International (ACHSI)"

Aim To Become Sri Lanka's First SMART & LEAN Hospital Chain

International Patient Centre One Stop Services for International Patients

Operates Home Care and Primary Care Centres

Q3 FY 2021-22 Performance

20 k+	175+	570+	4,240+	245k+	3,470+
PCR Tests	Covid ICU Patients	ICC Patients	Admissions	Outpatients	Surgeries

We have a widespread Lab Network

Lab Network Highlights

Centers of Excellence:

- Main Lab Services to Hospitals (10 B2B Labs +4 B2B CCs)
- Outer Labs services across the country (14 Labs)
- Collection centers across the country (21 CCs)
- PCR lab service
- 2400+ test portfolio
- Home mobile service
- Digitally connected lab network and patient portal

Q3 FY 2021-22 Performance

279k+
Test volumes

605+
GP Referrals (Targeting 1000+ by end FY21/22)

32k+
Rapid Antigen Tests (RAT)

20k+
PCR Tests

50+ Labs & Collection Centers across the Country

ISO 15189 : 2012
Accredited laboratory chain in Sri Lanka by SLAB

Aims to become the No.02 Laboratory Chain in Sri Lanka by 2024

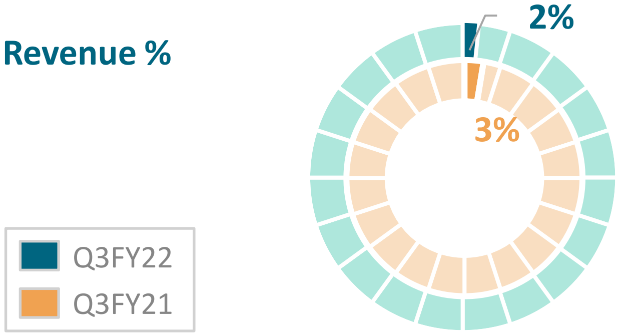
Mobility Sector

- Maritime
- Logistics
- Aviation

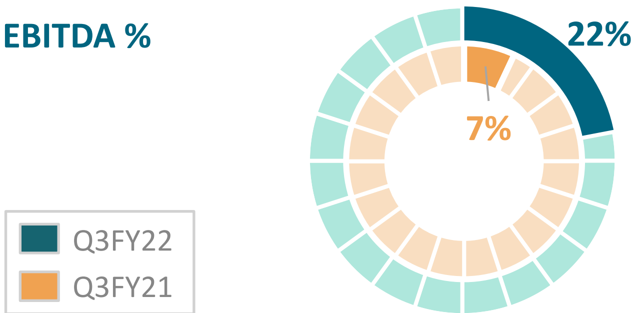
Mobility Sector

Contribution to Group

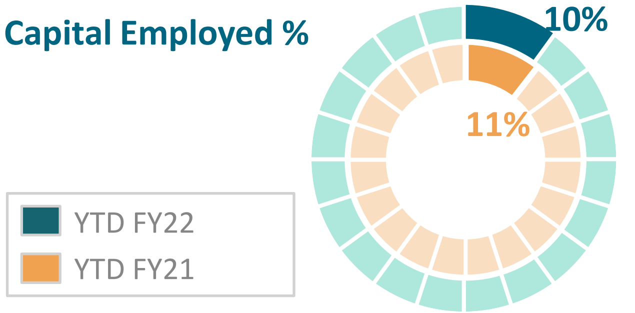
Revenue %



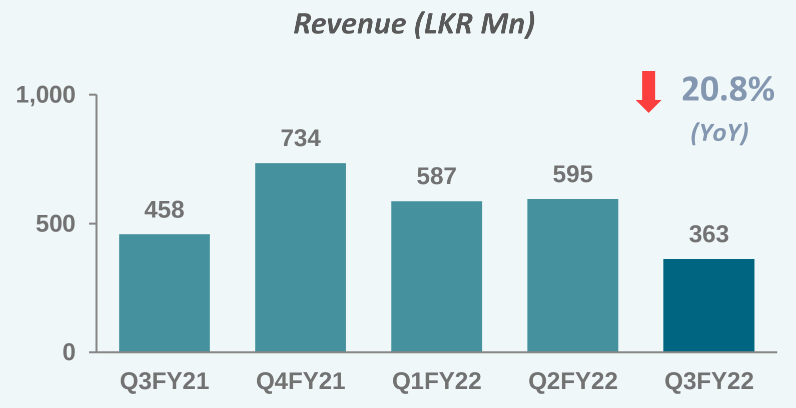
EBITDA %

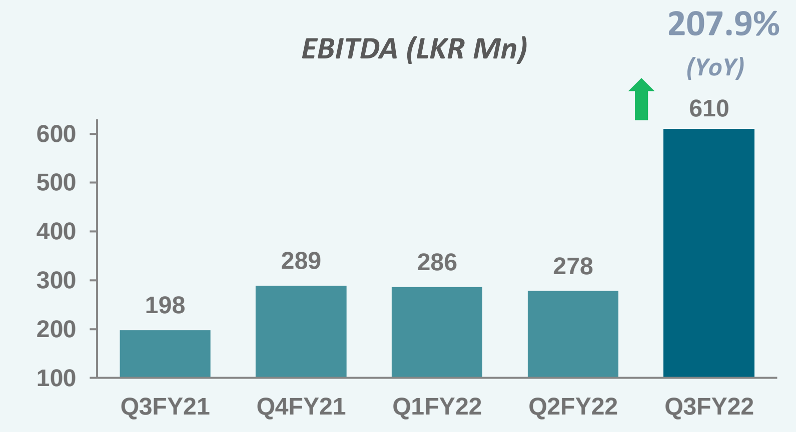


Capital Employed %



Sector Performance – Q3 FY 2021-22





Key Highlights

- Growth in industry freight rates partially negated the adverse impact of the drop in throughput, due to vessels continuing to skip Colombo to recover schedules.
- Maritime witnessed a steady double digit growth in revenue for the quarter.
- Aviation segment doubled profitability over last year with the resumption of passenger travel whilst sustaining the robust performance in the cargo segment.
- The group divested its interest in ‘Spectra Logistics’ for a total consideration of Rs 1.3 Bn in October 2021.
- The gain realized from the divestment amounted to Rs 295.3 Mn.

Mobility Sector

2 Shipping line – Evergreen line & Far Shipping

125,000+ TEUs
Throughput

15+ Vessels calling Colombo each week

Emirates
General Sales Agent for over 20 years

19% Air cargo market share

31% Passenger Market share

"Offering a Full Spectrum of End-to-end Services across Land, Sea and Air"

Facilitating over 1000+ supply chains

Emirates Sky Cargo – 1st in the network to operate mini freighters and cabin loading aircrafts in FY21

Represents the leading feeder operator to the East Coast of India and Bay of Bengal

Representations

Emirates

EVERGREEN LINE

FAR

A Group Digital Transformation that will Reimagine, Re-organize, Rebuild, Reinvent and Refocus Hemas

Reorganize
Leadership, Organization & Governance
New Ways of Working
Skills for the future
Digital DNA in our people

Rebuild
Digital Operations
Digital Infrastructure and Enablers
New Technologies
Leveraging Ai and ML across the Group

Reimagine
(Digital Vision & Strategy)

Reinvent
New Business Models and Markets
Ecosystems & Partnerships
Innovation & R+D

Refocus
Customer Experience and Digital Services
Digital Go To Market
Data Insights & data science
Advanced CRM

External

Digital Outcomes

Revenue and Value Creation

- New digital business models
- Customer retention / driving LTV
- Predictive data / AI driving sales

Cost Savings

- Automation (demand & supply planning)
- Faster & efficient Processes
- Use of IoT
- Reducing customer acquisition cost for B2C BUs

Non-quantifiable Benefits

- Higher customer satisfaction
- Decrease in staff turnover

Environmental Agenda 2030

Responsible Plastic Manufacture and Disposal Practices

From Design to disposal, we will strive to reduce use of plastic that are harmful to the environment

- **MoU with Ministry of Environment** : Over 2,000 plastic bins were placed at schools and Government institutions. Approximately 90,000 kg plastic collected annually.
- **MoU with Marine Environmental Protection Authority (MEPA):** River Strainer Trash Trap and 5 Beach Caretaker Project. Approximately 16,000 kg plastic waste collected annually.

Safeguard our Eco System

We will embrace and champion initiatives that protect and nurture our unique eco system

- Partnership with WNPS to restore mangroves in the Aniwiludana sanctuary.
- Partnership with rainforest protectors to convert the 15 acre degraded land belonging to the Rajawaka Forest Reserve into a forest over a period of 05 years.
- Commenced work on an Agro forest at the Dankotuwa factory.(herbarium)

Protect our Natural Resources

Actively pursue the use of natural resources in a responsible manner limiting the impact our operations have on the environment

- Started the process to shift to the utilization of solar energy at key locations: Morison, Atlas and Hemas Manufacturing.

Social and Purpose Led Initiatives

Say Yes To Life

Create awareness and support the early management of diabetes in our communities.

- Launch of 'Yes to Life' website.
- Healthy corners established at Government institutions.
- Tied up with the Ministry of Health to screen and stratify diabetics among Sri Lankans of all ages in line with World Health Organization guidelines.
- Awareness campaign for stakeholders during World Diabetes Day.

Eka Se Salakamu

Creating a social movement to empower children and families with Downs Syndrome to live a dignified life.

- Launch of AYATI Song.
- Launch of Ideation Zone designed to provide art therapy for children to express their thoughts visually as a form of communication that helps the therapist to have a better understanding of the child.

Sonduru Diriyawanthi

Providing natural hair wigs to patients undergoing chemotherapy and advocating that women are strong and beautiful with or without hair.

- Donation of natural hair wigs and care packs has taken place in 10 hospitals located island-wide.

Sustainability Performance – Q3 FY 2021-22 vs Q3 FY 2020-21

Carbon Footprint	(per Rs. Mn Revenue) 0.21 MT	↓ 12%
Water Consumption	(per Rs. Mn Revenue) 252.9 m^3	↓ 4%
Waste Recycled, Reused, or Recovered	63%	↑ 29%
Renewable Energy Generated	20,101 kWh	↓ 33%
Values of Fines for Non-Compliance with Laws and Regulations in the Social Economic Area		NONE
Total Work-Related Injury Rate	(per 100 employee) 0.09%	-
Training Hours and Development	12,489 Hours	↑ 92%
Gender Diversity	(female employees) 30%	↑ 7%

Corporate Governance

COG
Consists of the senior leadership team of 9 members - MDs of our 5 major businesses and 4 leaders from Corporate Office. Responsible for formulation and implementation of Group strategic plan. The COG, as in a gearbox in a vehicle, ensures that the Group works in a collaborative and high-performance manner not-withstanding the circumstances and challenges the Group faces.

The Board
Takes overall responsibility for the performance and affairs of the Group

Board Sub-committees
Ensures in-depth focus on delegated matters

Group CEO
Leads the Executive Management team. Responsible for strategy development, implementation and Group performance

Board Competition
- Independent directors
- Non-Executive Directors (including Chairman)
- Executive Directors

Independence
33%

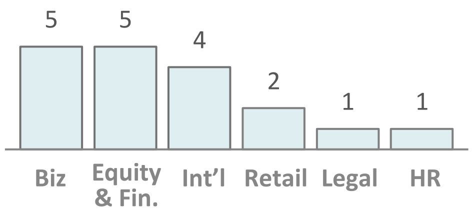
of the board is independent

Gender
89% : 11%

Independence
09

Board size promoting accountability and encouraging healthy, constructive debate and decision-making, while meeting regulatory requirements

Expertise
Experienced Board, combining knowledge and skills relevant to the Group



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