



Creative Peripherals and Distribution Limited

**Result Update Presentation – Q2 & H1 FY19
November 2018**





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Financial Highlights



Management Comment



Commenting on performance of Q2 & H1 FY19, **Mr. Ketan Patel, Chairman & Managing Director of Creative Peripherals & Distribution Ltd.** Said:

"We are happy to share that our financial performance for the half year has been in line with our targets. We delivered over 45% revenue growth, more than 80% EBITDA growth and a 73% PAT growth. Our EBITDA and PAT margins have also expanded by 82 and 25 basis points respectively. This is mainly on the back on increase contribution of high margin value-added products in the imaging & IT business segments like GoPro, Honeywell, Samsung, ViewSonic etc. In fact sales from products of the niche and reputed brand GoPro increased more than three times in first half 2019 compared the corresponding previous period.

We are happy to share that we have partnered with new brands like MEPL, Daewoo & Indicoool for selling and distribution of LED TV's in India. We are excited to share that we have expanded our Trademark Licensing agreement with Honeywell to Middle East countries and also added new products into Wireless Networking range. We believe that there is huge opportunity and demand for such products which will further increase export opportunities for us; thereby improving margins. With the onset of festive season in India, we have received significant inquires and pre-booking across E-commerce platforms and the Modern Trade & Photo specialist stores for all our products. We continue to focus on increasing revenue mix of such high margin yielding products.

Our goal remains to be the best market entry specialist for niche brands seeking entry into the Indian markets. Our pan India presence helps us provide a unique solution to our clients. It is a matter of pride to be associated with prestigious brands that we partner with and promise to deliver on the trust they place in us. I would like to thank our channel partners, our business partners, and our employees for their invaluable support and belief in us which drives us to deliver robust performance every quarter."



Key Developments During Q2 & H1 FY19

- ✓ Company entered into agreement with Future Tech Electronics Pvt. Ltd. to become authorized Distributor for selling and marketing of LED TV's for DAEWOO, MEPL & INDICOOL brands in India

Details of Products Distributing for Future Tech:

Brand	Details	Screen Sizes (inch)
DAEWOO	Full HD integrated LED with 4K & Smart CMS	All Sizes
MEPL	Full HD integrated LED with 4K & Smart CMS	All Sizes
INDICOOL	Full HD integrated LED with 4K & Smart CMS	All Sizes

- ✓ Company expands Trademark Licensing agreement with Honeywell with geographic expansion to Middle East countries along with added new products
 - will now be able to additionally offer the products to additional six countries namely Saudi Arabia, United Arab Emirates, Bahrain, Oman, Qatar and Kuwait along with India
 - Product portfolio now includes Wireless Networking range of products



Quarterly Performance Highlights – Q2 FY19 (YoY)

28.69% ↑

Revenue Rs 79.00 Cr

51.42% ↑

EBITDA Rs 2.81 Cr

53 bps ↑

EBITDA Margin 3.55%

28.31% ↑

PAT Rs 1.05 Cr

28.37% ↑

EPS Rs 1.81 VS Rs. 1.41 (Q2 FY18)

Robust growth across all category, particularly Imaging



Key Quarterly Financial Highlights

Rs. Cr	Q2 FY19	Q2 FY18	YoY%	Q1 FY19
Income From Operations	79.00	61.18		77.44
Other Operating Income	0.08	0.27		0.02
Total Income from Operations	79.08	61.45	28.69%	77.47
Raw material	71.79	55.98		70.09
Employee Cost	1.65	1.33		1.61
Other Cost	2.83	2.29		3.07
Total Expenditure	76.27	59.59		74.77
EBITDA	2.81	1.85	51.42%	2.69
EBITDA Margin (%)	3.55%	3.01%	53 bps	3.48%
Interest	1.04	0.61		0.97
Depreciation	0.15	0.03		0.02
Other Income	0.00	0.00		0.00
Exceptional Item	0.00	0.00		0.00
Profit Before Tax	1.62	1.21		1.70
Tax	0.57	0.39		0.74
PAT	1.05	0.82	28.31%	0.96
PAT Margin (%)	1.33%	1.33%	0 bps	1.23%
EPS in Rs.	1.81	1.41	28.37%	1.65

- Revenue increased on account of higher sales in imaging business category, especially GoPro
- EBITDA Margin expansion was led by increased contribution of high margin value-added products in Imaging & IT like GoPro, Honeywell, Samsung, ViewSonic etc.



Half Yearly Performance Highlights – H1 FY19 (YoY)

40.26% ↑

Revenue Rs 156.54 Cr

83.15% ↑

EBITDA Rs 5.50 Cr

82 bps ↑

EBITDA Margin 3.51%

73.51% ↑

PAT Rs 2.01 Cr

25 bps ↑

PAT Margin 1.28%

72.14% ↑

EPS Rs 3.46 VS Rs. 2.01 (H1 FY18)

Robust growth across all category, particularly Imaging & IT products



Half Yearly Financial Highlights

Rs. Cr	H1 FY19	H1 FY18	YoY%
Income From Operations	156.45	111.07	
Other Operating Income	0.10	0.54	
Total Income from Operations	156.54	111.61	40.26%
Raw material	141.89	102.19	
Employee Cost	3.26	2.67	
Other Cost	5.90	3.75	
Total Expenditure	151.05	108.61	
EBITDA	5.50	3.00	83.15%
EBITDA Margin (%)	3.51%	2.69%	82 bps
Interest	2.01	1.22	
Depreciation	0.17	0.06	
Other Income	0.00	0.00	
Exceptional Item	0.00	0.00	
Profit Before Tax	3.32	1.72	
Tax	1.31	0.56	
PAT	2.01	1.16	73.51%
PAT Margin (%)	1.28%	1.04%	25 bps
EPS in Rs.	3.46	2.01	72.14%

- Revenue increased on account of higher sales in imaging business category, especially GoPro
- EBITDA Margin expansion was led by increased contribution of high margin value-added products in Imaging & IT like GoPro, Honeywell, Samsung, ViewSonic etc.



Balance Sheet Highlights- As on 30th September

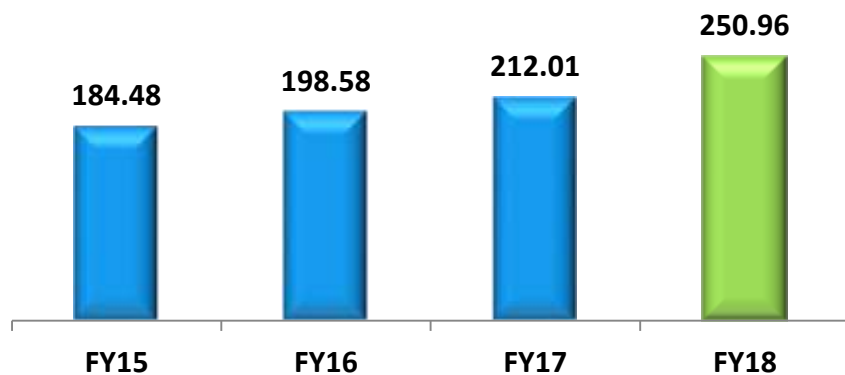
Rs. Cr	As on 30 th Sept 2018	As on 31 st March 2018
Shareholder's Funds	29.96	27.95
Share capital	5.80	5.80
Reserves & Surplus	24.16	22.15
Non-current liabilities	5.00	0.09
Long term borrowings	5.00	0.09
Defer Tax liabilities	0.00	0.00
Other Long-Term liabilities	0.00	0.00
Long-Term Provisions	0.00	0.00
Current liabilities	67.78	73.62
Short Term Borrowings	30.24	25.15
Trade Payables	26.32	34.23
Other Current liabilities	8.60	12.19
Short-term provisions	2.62	2.05
Total Equities & Liabilities	102.73	101.66

Rs. Cr	As on 30 th Sept 2018	As on 31 st March 2018
Non-current assets	9.93	9.64
Tangible Assets	8.14	7.65
Non-current Investments	1.44	1.38
Net Deferred Tax Asset	0.06	0.26
Long-term loans & advances	0.00	0.00
Other non-current assets	0.00	0.00
Miscellaneous Expenses	0.29	0.34
Current assets	92.79	92.02
Inventories	22.81	27.92
Trade receivables	41.90	42.85
Cash & Cash equivalents	2.29	2.24
Short-term loans & Advances	25.79	19.02
Other Current Assets	0.00	0.00
Total Assets	102.73	101.66

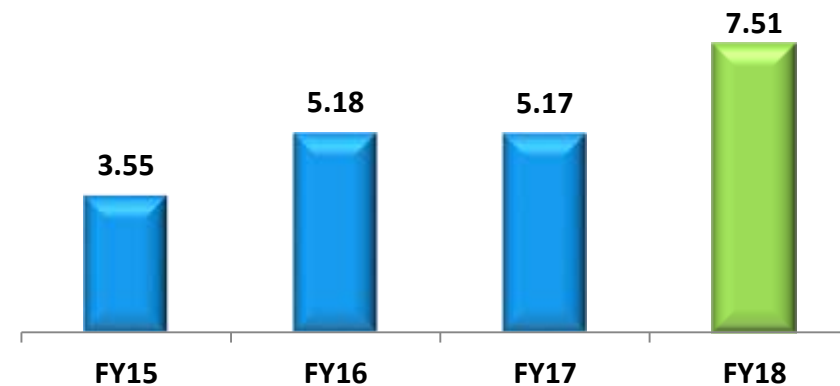


Annual Financial Highlights

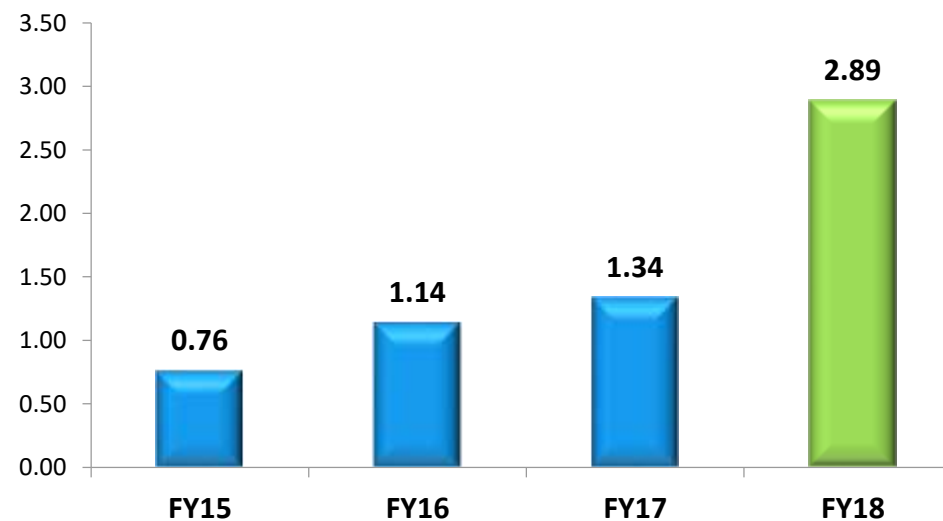
Revenue (Rs. Cr)



EBITDA (Rs. Cr)



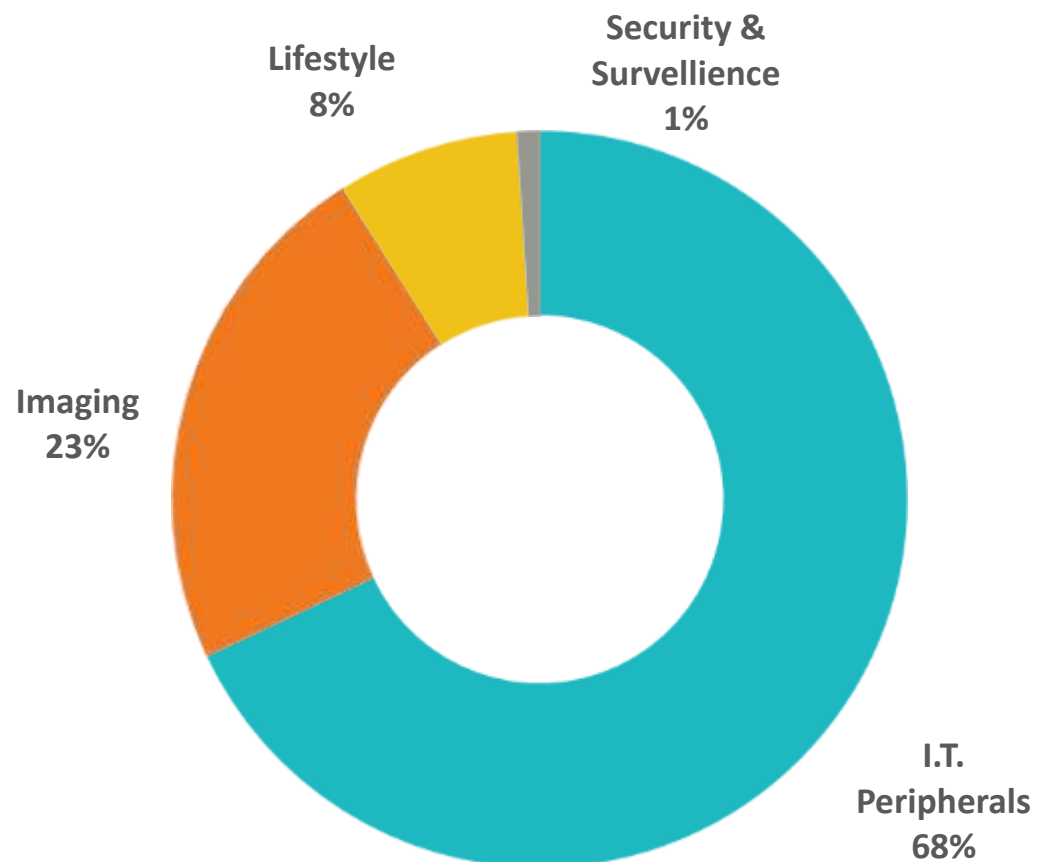
PAT (Rs. Cr)



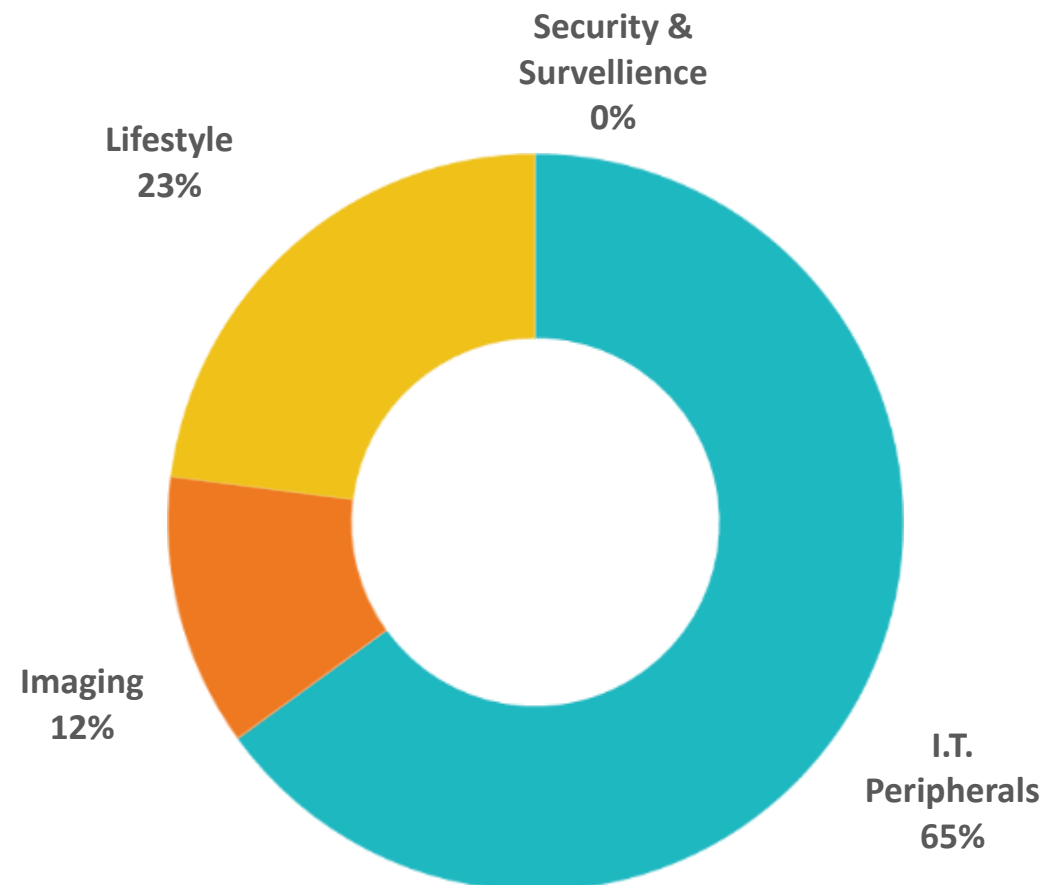


Revenue Contribution – Business category

FY2018



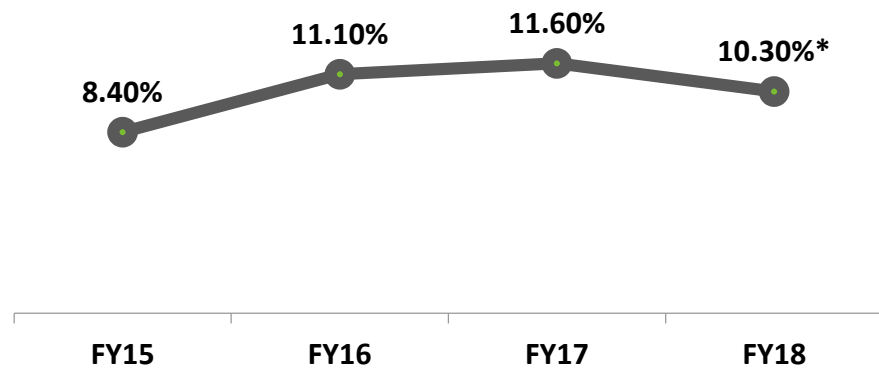
FY2017



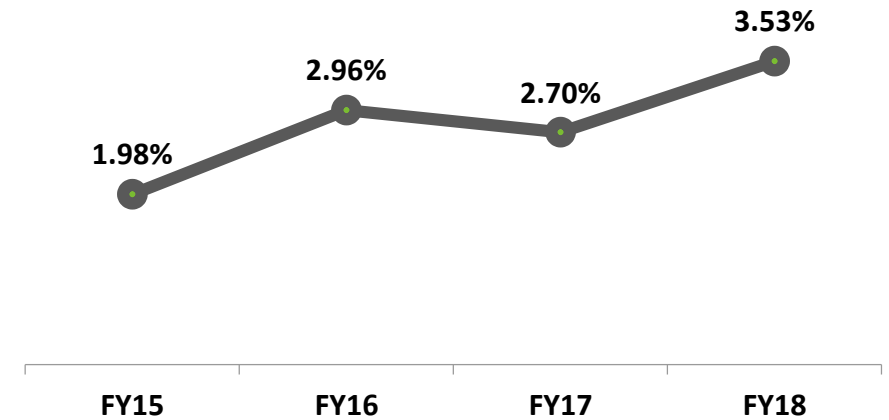


Consolidated Key Return Ratios

RoE(%)



RoA(%)



Return on Assets reflects impact of new high-end product additions in existing and new Security business category during the financial year

* On account of equity base increasing as company raised money through IPO

RoE = Net Profit/Net Worth | RoA = Net Profit/Average Total Assets



Annual Financial Highlights

Rs. Cr	FY18	FY17	YoY%
Income from Operations	249.83	210.95	18.43%
Other Operating Income	1.12	1.06	
Total Income from Operations	250.96	212.01	18.37%
Raw material	226.41	196.88	
Employee Cost	5.76	4.99	
Other Cost	11.28	4.98	
Total Expenditure	243.45	206.85	
EBITDA	7.51	5.17	45.35%
EBITDA Margin%	2.99%	2.44%	55bps
Interest	3.02	2.91	
Depreciation	0.14	0.15	
Other Income	0.00	0.00	
Exceptional Item	0.00	0.00	
Profit Before Tax	4.34	2.11	
Tax	1.46	0.77	
PAT	2.89	1.34	115.51%
PAT Margin%	1.15%	0.63%	52bps
EPS in Rs.	5.02	5.75	

*Company raised funds through IPO in April 2017



Balance Sheet Highlights- As on 31st March

Rs. Cr	As on 31 st March 2018	As on 31 st March 2017
Shareholder's Funds	27.95	11.56
Share capital	5.80	4.00
Reserves & Surplus	22.15	7.56
Non-current liabilities	0.09	0.09
Long term borrowings	0.09	0.09
Defer Tax liabilities	0.00	0.00
Other Long-Term liabilities	0.00	0.00
Long-Term Provisions	0.00	0.00
Current liabilities	73.62	50.16
Short Term Borrowings	25.15	23.20
Trade Payables	34.23	23.16
Other Current liabilities	12.19	3.10
Short-term provisions	2.05	0.70
Total Equities & Liabilities	101.66	61.81

Rs. Cr	As on 31 st March 2018	As on 31 st March 2017
Non-current assets	9.64	0.56
Tangible Assets	7.65	0.28
Non-current Investments	1.38	0.00
Net Deferred Tax Asset	0.26	0.19
Long-term loans & advances	0.00	0.00
Other non-current assets	0.00	0.00
Miscellaneous Expenses	0.34	0.09
Current assets	92.02	61.25
Inventories	27.92	20.94
Trade receivables	42.85	28.29
Cash & Cash equivalents	2.24	1.73
Short-term loans & Advances	19.02	10.29
Other Current Assets	0.00	0.00
Total Assets	101.66	61.81

*Company raised funds through IPO in April 2017



Company Overview



Who we are

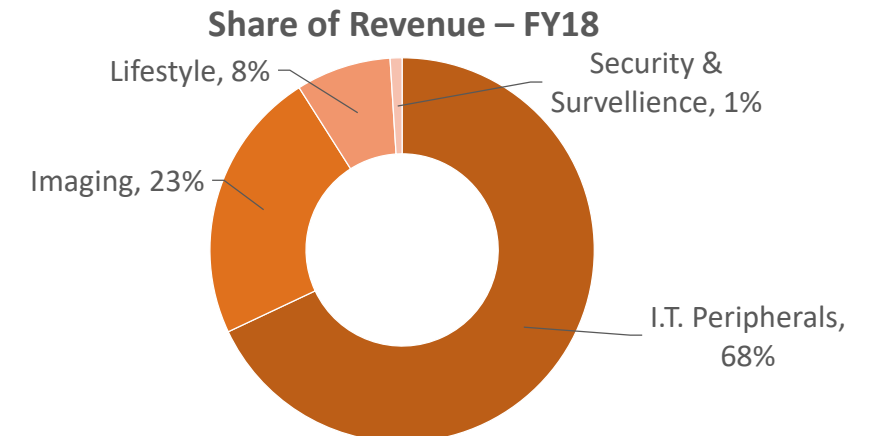
Specialists in Market Penetration & Distribution in IT, Imaging, Lifestyle and Security domains

- ❑ Industry leader specialising in market entry for **global brands** in India
- ❑ Specialist in leveraging partners' market positioning and **enhancing partners' business value**
- ❑ **Fastest growing** national distributor 2014-15 (Digital Terminal)
- ❑ **Unique** distribution model, well-placed to capitalise on market opportunities
- ❑ FY18 Revenues of Rs 251 Crores

**25+
Brands**

**3200+
Products**

**5000 +
Partners**





Journey so far...

- Started 'Creative Computers' - proprietary trading concern with 02 employees

1992

2013

- Foray into Imaging business
- Exclusive Photo Distribution from Vitec Group of Italy for Manfrotto
- Exclusive distribution for 5 new global IT vendors

2015

- Reliance Digital 'Best Fulfillment Partner'
- Exclusive distribution for 8 new global brands

2016

- Distribution license received for GoPro

- Change to Public Limited- Listing on NSE- SME Platform
- Forayed into Security and Surveillance business
- Exclusive license for Honeywell
- Received 'Licensing Partner of the year 2017' award from Honeywell
- Addition of 5 new Honeywell branded products
- Renewal of partnership agreement with Samsung
- Agreement with Shyam Telecom Ltd. For distribution of Motorola accessories & with DgFlick Solutions Pvt. Ltd. to distribute software products in India
- Expands Trademark Licensing agreement with Honeywell with geographic expansion to Middle East countries along with added new products
- Agreement with Future Tech Electronics Pvt. Ltd. to become authorized Distributor for selling and marketing of LED TV's for DAEWOO, MEPL & INDICOOL brands in India

2017-18

2005

- Change to Creative Peripherals & Distribution Pvt. Ltd.
- MICROSOFT Best Retailer Award
- EPSON Best Channel Partners Award, Best Performer award for Inkjet printer & All in One

2007

- Epson Business Partner
- AOC Asia -Pacific- Excellent Distributor Award

2010

- Foray into Lifestyle business
- SENNHEISER Best Distributor Consumer segment Of Year
- BELKIN Jo Jeeta Wohi Sikandar Award

- Awarded 'Best Trade Show Execution' by Vitec Group for seamless execution of Consumer Electronic Imaging Fair – CEIF 2018.
- Signed Exclusive Agreement with InVue Security Products Corp. to distribute their products nationally.
- Signed Agreement with ASRock Inc. to distribute their motherboards in India
- Received "Best Fulfillment Partner 2017" award from Reliance Digital
- Renewed National Authorised Distribution Agreement with Apple India Pvt. Ltd.
- Renewed distribution agreement with Vitec Group of Italy for their top brands Manfrotto and Gitzo for 5th Consecutive year
- Launched GoPro Hero 7 series Products – HERO 7 Black, HERO 7 Silver, HERO 7 White



Key Team



Mr. Ketan Patel

..... **Chairman & Managing Director**

- IIM - B Alumnus with Engineering in Computer Technology from Mumbai University
- With over three decades of experience, he has built expertise in business strategy, planning, product marketing and people management
- Responsible for maintaining vendor relations & new product development



Mrs. Purvi Patel

..... **Whole Time Director**

- She holds a Diploma in Pharmacy with graduation in Computer Programming
- Responsible for human resource, administration and logistics functions



Abhijit Kanvinde

..... **Chief Financial Officer**

- Chartered Accountant with over 20 years of strong and multi-industry experience
- Worked in companies like Garnier India, Novartis Consumer Health, Shringar Cinemas, etc
- Has been CFO of listed company for over 6 years, also successfully completed the IPO 2x in his career



Vijay Advani

..... **Whole Time Director**

- Bachelor of Commerce from Mumbai University, with over 32 years of experience
- His expertise lies in business planning, execution and key account management. He has over a decade's experience in Value Added Distributors Industry, including companies like General Electronics



Upendra Singh

..... **National Sales Head**

- Bachelor of Commerce from Ranchi University, with nearly three decades experience in Sales & Marketing
- His expertise lies in vendor management, sales generation & market penetration. With over 11 years' experience in IT hardware industry, he drives national channel & corporate sales



Amol Patil

..... **National Product Head**

- MBA in Marketing with Engineering in Electronics and Telecom, with over 20 years' experience in the IT industry
- His expertise lies in identifying latest market opportunities with excellent team management and execution skills. He is responsible for profitable management of products portfolio



Awards & Recognitions



"Most Valuable Partner"
- **ADATA**



"Excellence Distributor"
- **AOC Asia Pacific**



*"Best Distributor in the
Consumer segment"*
- **Sennheiser**



*"Microsoft Best Retailer
Award"*



Best Trade Show Execution –
Vitec Group



*"Long Term Partnership
& Best Distributor"*
- **Sennheiser**



*"Reliance Digital Brand of
the Year & Best Fulfilment
Partner"*



*"Smart Photography Award
2016"* - **Olympus**



"Jo Jeeta Wohi Sikandar" –
Belkin



"Partner of the Year 2017" -
Honeywell



Industry Overview



Technology distributors have evolved, navigating challenges

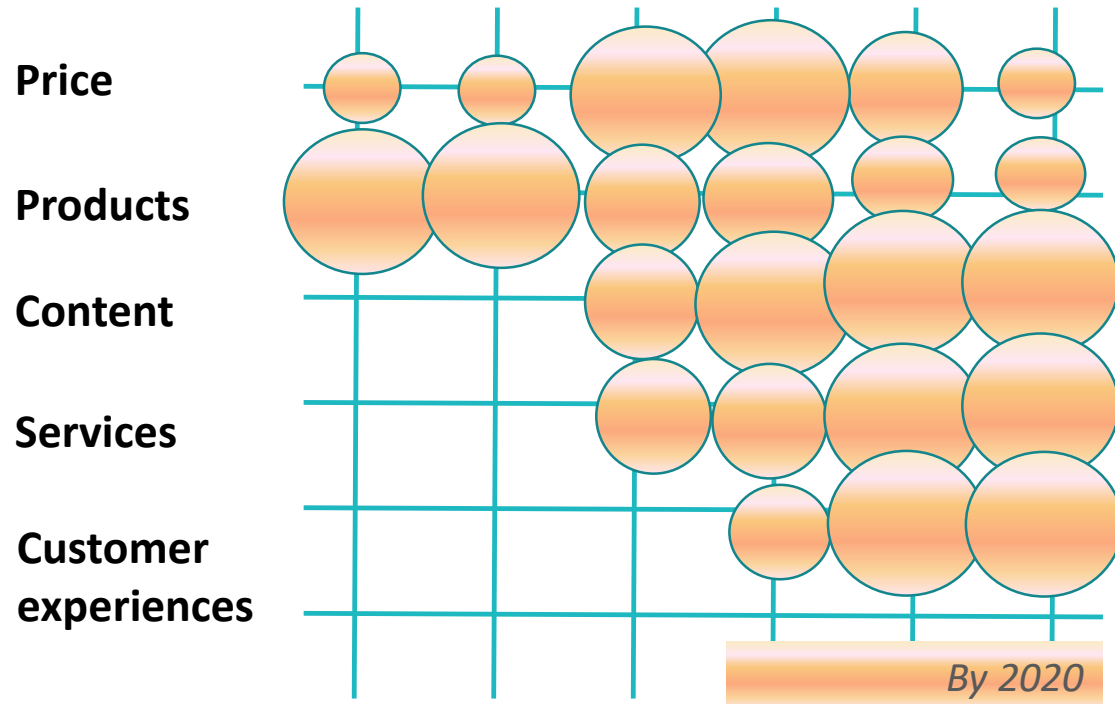
	Cycle I 'Dawn of the PC era'	Cycle II Internet Grows Globally	Cycle III MSPs, Mobility advance	Cycle IV Digital disruption
	1970s-1980s	1990s	2000s	Current
Key Characteristics	• "Pick, pack and ship" • End-users chained to desktop	• Distributor financing programs fund channels • Wireless technology, e-Commerce models	• Shift to "problem solving" • Managed services • Internet enabled solutions and services	• Market shift from "products" to "experiences" • Connected ecosystems • Big Data, device management, Cloud and IoT
What was needed to succeed	• Capital • Scale	• Innovation • Skilled developers	• Capital • Expertise • Information sharing	• Access to partnerships • Scale & Skills • Customer intimacy, information network
Addressable market size	<\$100 BN	<\$300 BN	\$650 BN +	\$900 BN +
Key challenges	• Capital Intensive • Monolithic • Unresponsive	• Complex environment • High cost • Skills gap	• Extreme price-sensitivity • Lack of innovation • Skills gap	• Widening skills gap • Transformation pressure • Poor execution of brand strategy



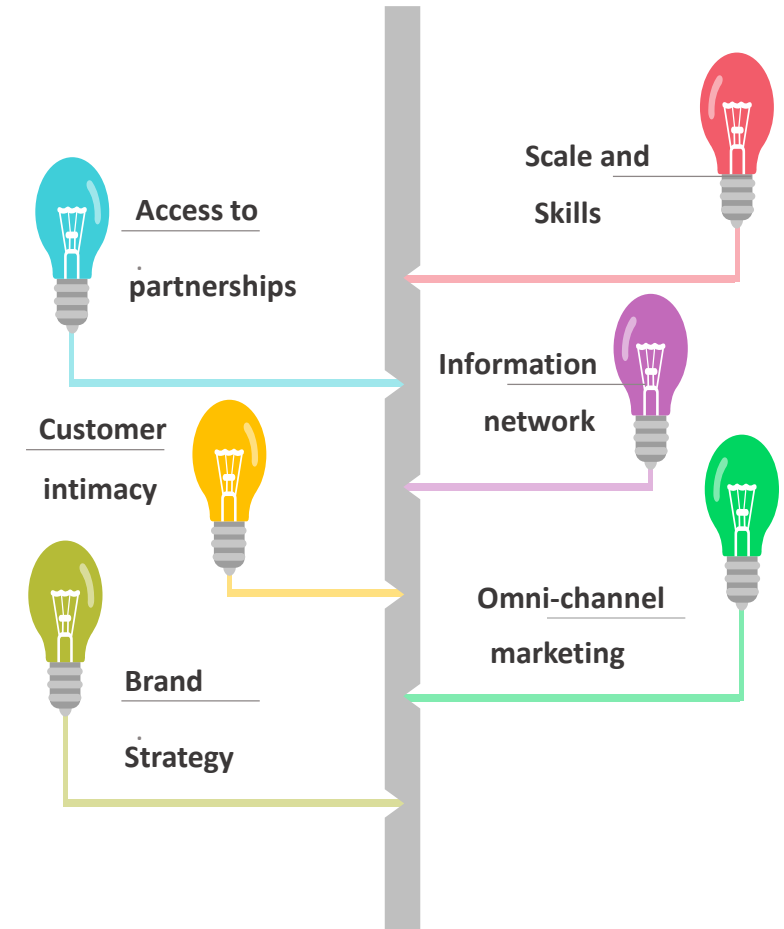
Digital Transformation : From “Product” to “Experience”



Creative Peripherals



What is needed?



By 2020, **CUSTOMER EXPERIENCE** is set to overtake **PRICE** and **PRODUCT** as the most important **BRAND DIFFERENTIATOR**



We are leading the Digital Disruption Cycle

Scale & Skills

5000+ Partners

3200+ Products

26 Branches

135+ employees

25+ Brands

Integrated Distribution Model

100+ Trained, professional sales staff

Region-wise sales targets



Building customer intimacy and improving partnerships

1200+ Trainings conducted at shop level annually

POP Installations at point-of-sale locations

150+ On-ground events conducted for brand promotion

Reseller workshops and product demos

Technology – driven innovations and brand strategy

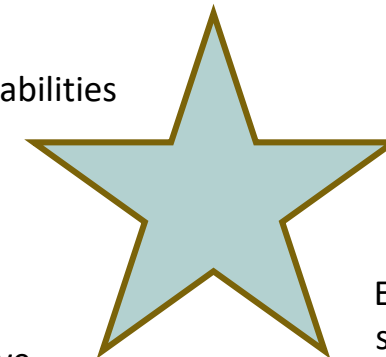
Enabling newcomers/channel partners leverage their capabilities

Identifying right vendors & partners

Continually vetting tech landscape for ideal products and solutions

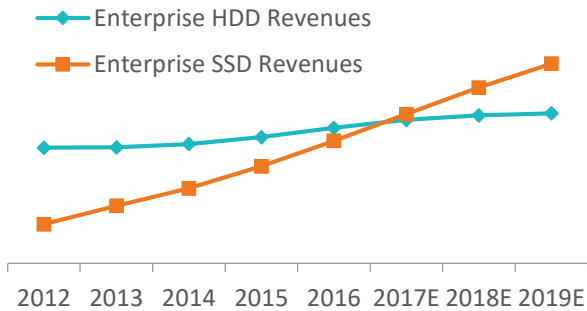
Supporting ramp-up in multiple countries/regions with cost-effective scalable processes

Ensuring vendors have right structure for global channel programs





Key trends – Business category : IT



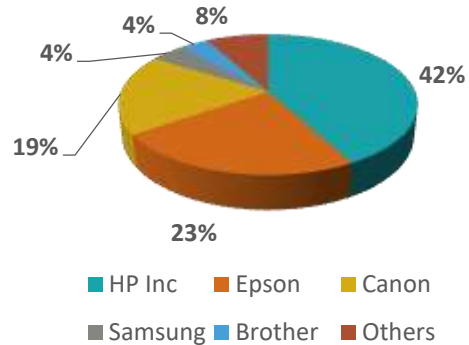
India Storage Market Growth

17.5%

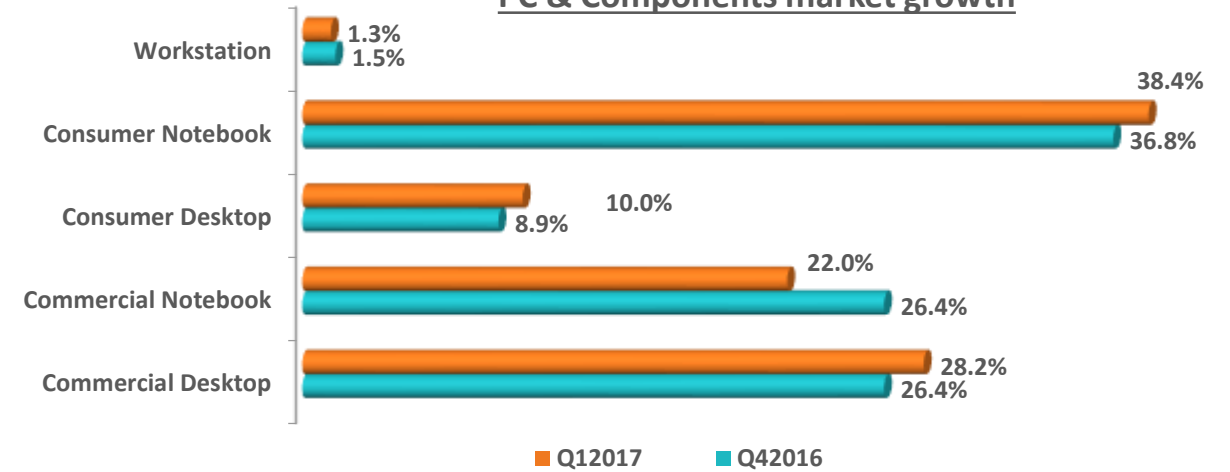
Storage: Enterprise SSD storage revenues crossover HDD data

India Market – Hardcopy Peripherals	
Q42016	7,95,188
Q1 2017	7,99,164
Growth %	0.5%

Top vendors by Market share

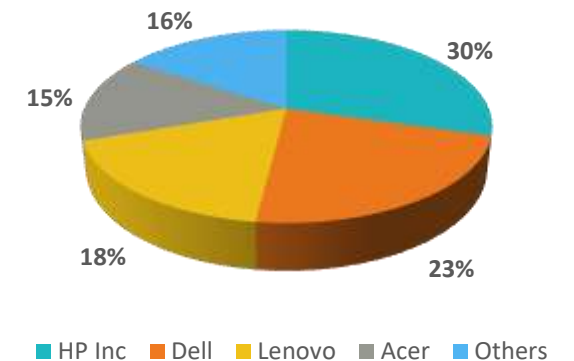


PC & Components market growth



PC & Components: Desktop shipments growth bouncing back

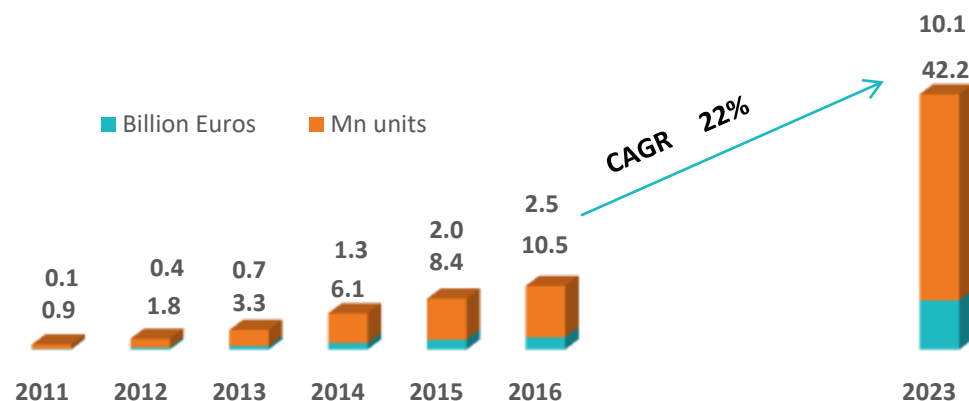
Top vendors by Market share



Peripherals: Steady growth in Printers & Monitors

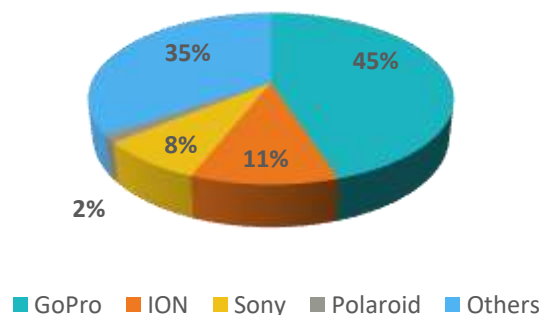


Key trends – Business category : Imaging



Global Action Cameras market seen at over 10 Bn Euros by 2023

Top vendors by Market share



Growth drivers

Product Innovation

Innovations like Flash higher storage, VR/AR, 360 degree images, longer battery life, connectivity through Wi-fi, bluetooth driving growth

Social Media Marketing

Facebook, Twitter, Instagram, YouTube, other social media platforms used for product promotions

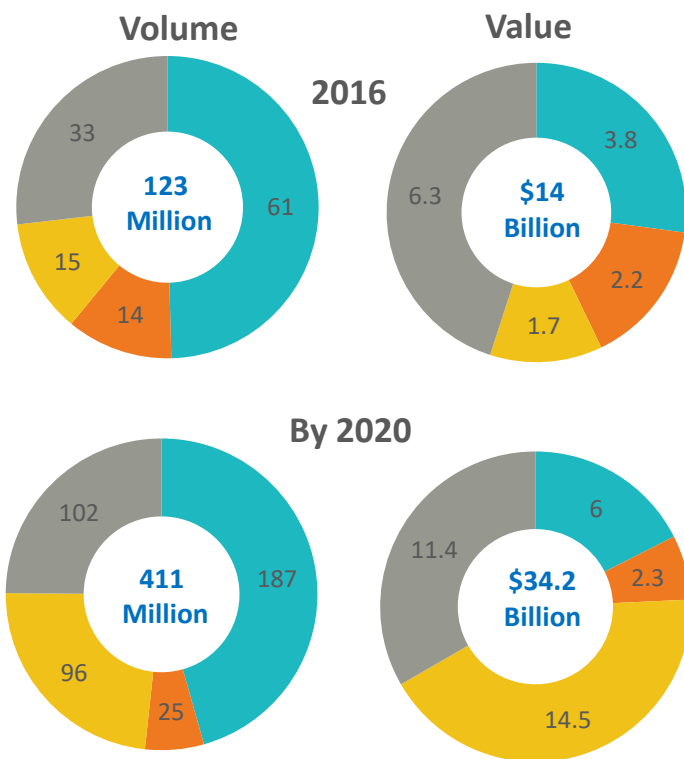
Imaging for Business

- Virtual Reality (VR) Glasses can fit into any hardware or PC
- Augmented Reality (AR) reads bar codes in a warehouse and acts as virtual monitor
- Security systems for monitoring buildings, properties
- Media, healthcare, automotive, industrial usages

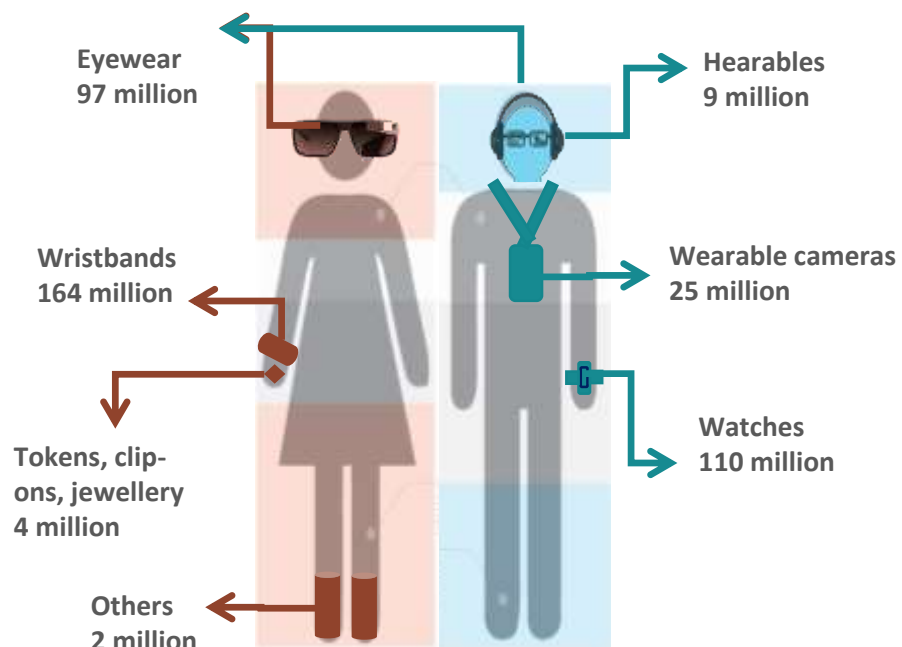


Key trends – Business category: Lifestyle Gadgets

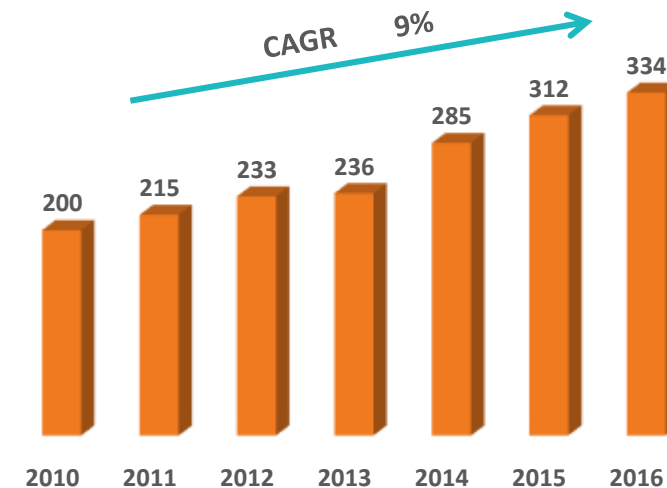
Global wearables market size



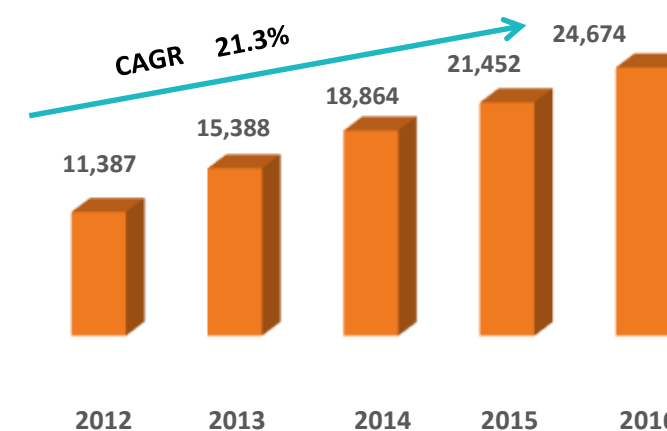
Device sales by 2020



Headphones & Earphones Market Opportunity



Panel TV Market Opportunity



Smartphones market has stabilized, incremental growth driven by durables like Panel TVs
Smart audio, headphones and ear phones market to see exponential growth



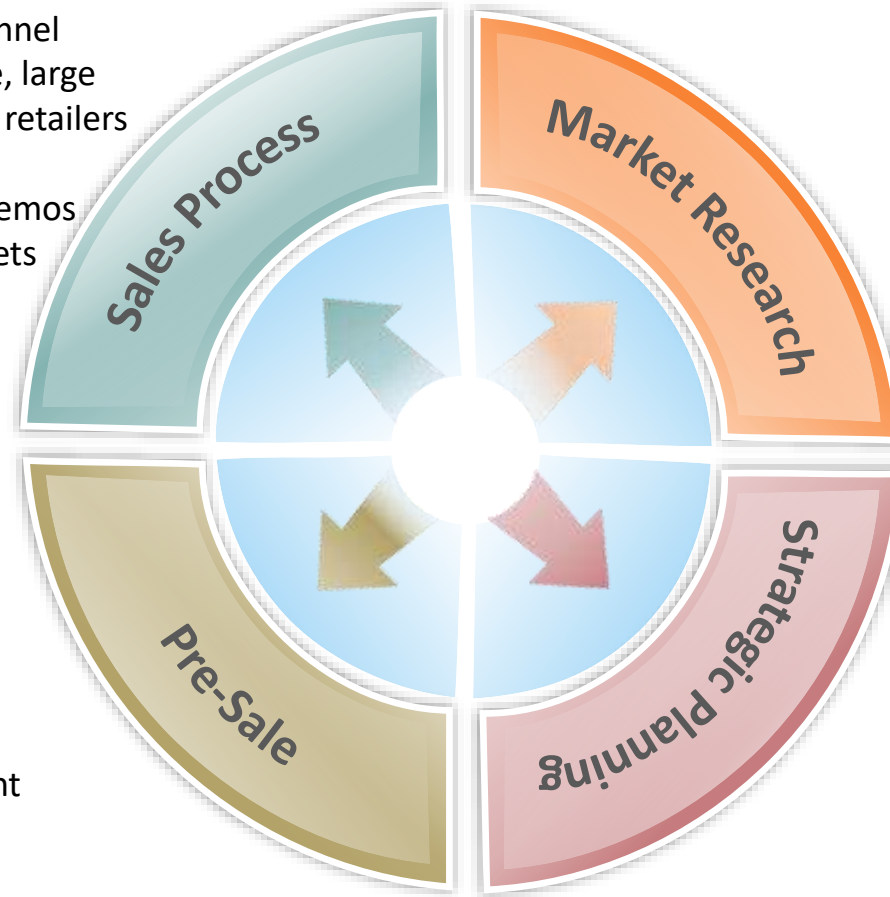
Business Overview



Integrated Distribution Model

- Relationships with channel partners : E-Commerce, large format and specialized retailers
- Corporate Sales team
- Reseller workshop & demos
- Region-wise Sales targets

- Digital Cataloguing
- POP Installations
- Brand Awareness
- Customer Engagement



- Generating Brand Interest
- Location-wise market demand
- Market demand Analysis
- Competition Analysis

- ***Dedicated product sales specialists***
- ***Identification & Training of partners***
- ***On-site product implementation & support***
- ***Bundling products with ISVs***
- ***Marketing activities***

- Channel Strategy
- Sales Planning
- Quarterly Tracking
- Promotions
- Training & events



Brands we work with



Information Technology

- AOC, ASRock, DGFlick, Honeywell, NZXT, Net Protector, Philips Signage, Printronix, Rapoo, Samsung, Transcend, Viewsonic



Imaging

- GoPro, GITZO, Manfrotto, National Geographic, Olympus



Lifestyle

- Daewoo, MEPL, Sharp, Sennheiser, Viewsonic



Security

- InVue



Brands we work with



Creative Peripherals





Geographical Presence; Network

Current Presence

- Mumbai- Lamington Road, Kandivali
- Ahmedabad
- Aurangabad
- Bangalore
- Bhopal
- Chennai
- Delhi
- Goa
- Hyderabad
- Haryana
- Hubli
- Indore
- Jaipur
- Kolhapur
- Kolkata
- Kerala,
- Ludhiana
- Lucknow,
- Noida
- Nasik
- Nagpur
- Pune
- Raipur
- Rajkot
- Surat



Extensive Reach

A network of 5,000+ partners

Opened new branch in Hong Kong

131 employees (on & off roll)



Operations – Process Improvements

Training



- **100+** Trained, professional sales staff
- **1,200+** Trainings conducted at shop level annually

Events



- **150+** On-ground events conducted for brand promotion

Promotions



- Digital Catalogues
- POP Displays



Infrastructure & warehousing

Mother Warehouse @ Bhiwandi, Maharashtra



Dispatch all over India from Central warehouse

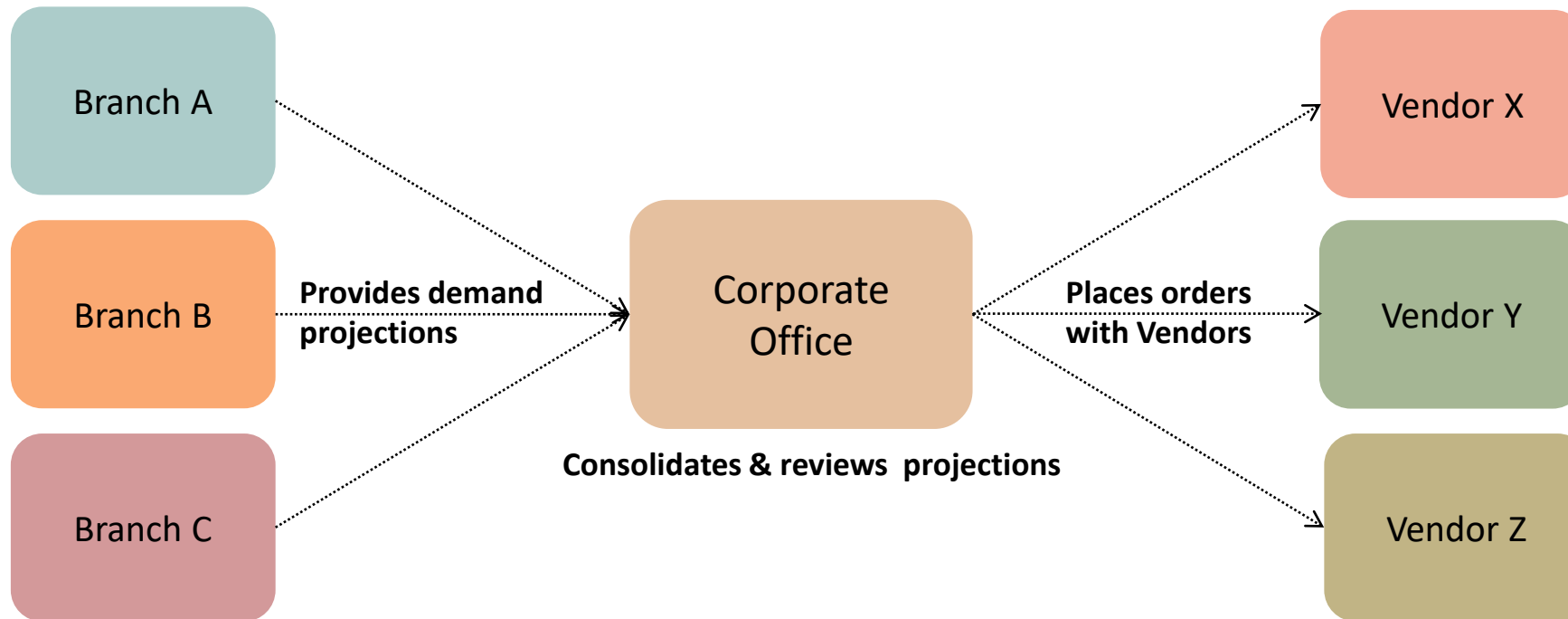
- Services offered: Warehousing and Transportation
- Area : 40,000 Sq. ft.
- Transactions handled: 3,500 tonnes per annum
- Safety measures: Camera and Fire fighters
- Systems & processes: Systems for inward & outward, packing and stock keeping (Bar Code system for outward)
- Semi-automatic warehousing

Key features

- Fast and on-time delivery
- Can arrange dispatch from single unit to container
- Tie-ups with reputed transporters and couriers
- Trained and experienced staff



Inventory and Receivables Management



Inventory Management

- Continuous monitoring of stock over-ageing
- Physical verification by internal and external audit team
- Annual audit of each warehouse

Receivables Management

- Credit assessment to assign dealer credit limit
- Dealer accounts reviewed & monitored periodically
- Credit team present across India



Key Achievements

01

60% growth in number of partners year on year for Sennheiser, along with 42% growth in turnover for retail since partnering with CPDPL

02

40% growth in number of partners over the years, with 35% increase in turnover for retail for Beats (exclusively distributed by Creative Peripherals)

03

25% growth in turnover for retail was seen by AOC monitors and TV, after partnering with Creative Peripherals

04

48% increase in turnover in retail for Bandridge, after partnering with Creative Peripherals



Way Ahead



Expanding on Exclusive Partnership with Honeywell



Product Designing and Manufacturing

- Contract manufacturing of Stock Keeping Units (SKUs) in Honeywell certified and approved factories.
- Designing and packing products as per Honeywell global packing guidelines
- Design ID's owned by Creative Peripherals



Honeywell



Exclusive Distribution, Premium Pricing

- Supplying, merchandising across India in modern retail, E-commerce and traditional channel stores
- Warranty and after sales service for Honeywell products
- Premium pricing of products



International Markets

- Distribution agreement for India and SAARC countries
- Currently selling via large format retail, e-commerce and traditional channels
- Plans to target SAARC countries in FY19

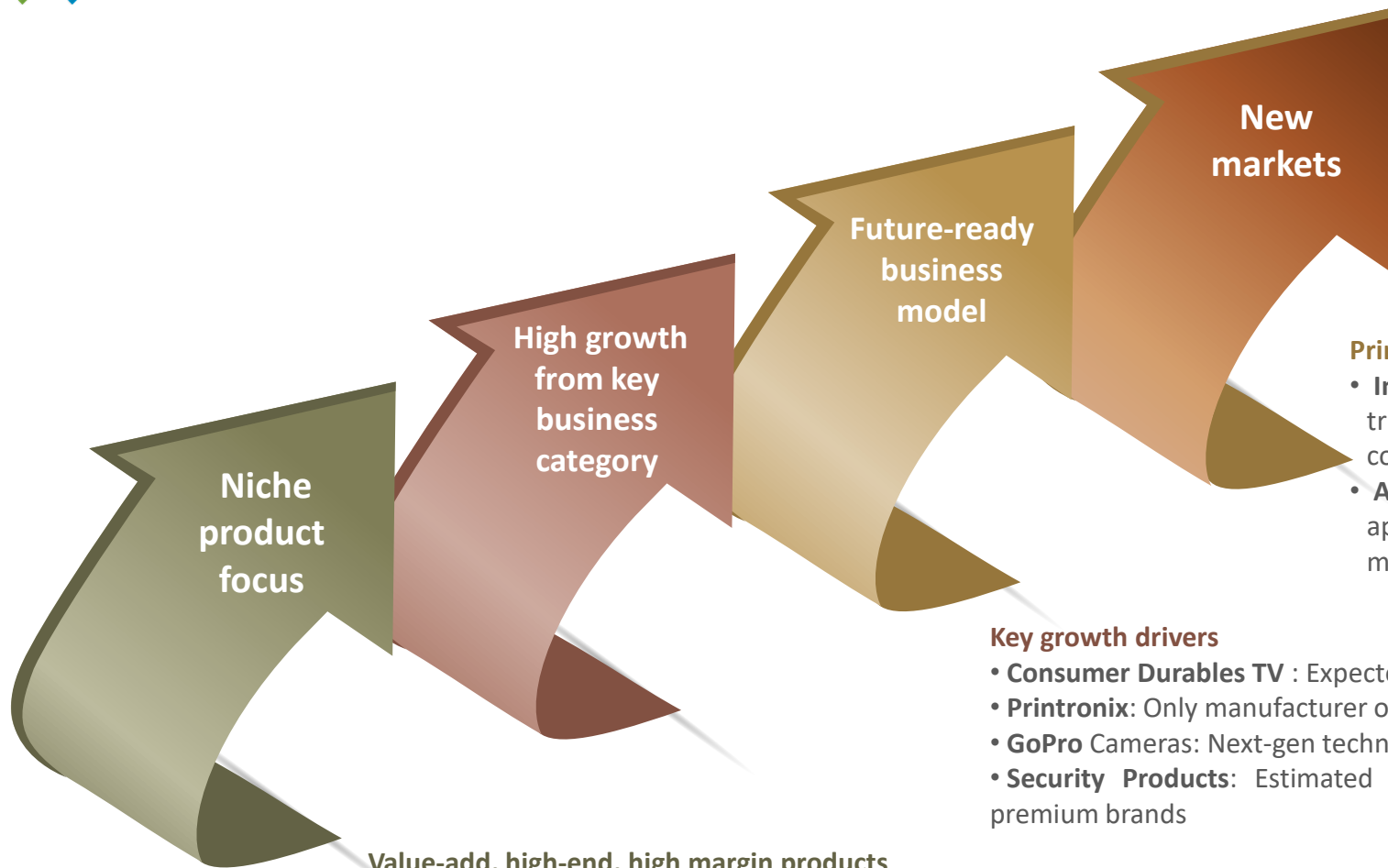


Scalability

- Going forward, plan to manufacture in India under the 'Make in India' initiative
- Strong demand for networking, specialty technology products



Future-ready business growth



Value-add, high-end, high margin products

- Focus on select brands like GoPro, Honeywell, Manfrotto, Olympus
- High-margin, high-volume products
- Creating “Retail experience zones” for value add
- Target elite channel partners and end-user category

Key growth drivers

- **Consumer Durables TV** : Expected to grow 22%, as smartphone market stabilizes
- **Printronix**: Only manufacturer of line printers; target BFSI, logistics, pharma industries
- **GoPro Cameras**: Next-gen technology, premium pricing, target high-end users
- **Security Products**: Estimated market size over \$350 bn; exclusive distribution of premium brands

Expansion in new markets

- **Domestic market**: Smart Cities and Make in India boosting demand from OEMs as well as service providers; Smart Homes, Vehicles; Big Data and Analytics, Intelligent technology & hardware to drive future growth
- **International market**: Expanding in the Middle East and SAARC Countries

Primed for new-age customer behavior

- **Internet of Things (IoT)**: Asia-Pacific investment projected over \$2.5 trillion by 2020; smart connected machines, augmented reality, cloud connectivity in enterprise markets
- **Artificial Intelligence(AI)**: Machine learning solutions and applications used across institutions ; advanced robotics, wearables market size currently over \$35bn



Thank You



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