



Enduring Value

NATION FIRST: SAB SAATH BADHEIN

RESULTS UPDATE & FAQ Q2 FY23



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Q1. What is ITC's Vision and Mission?

Vision:

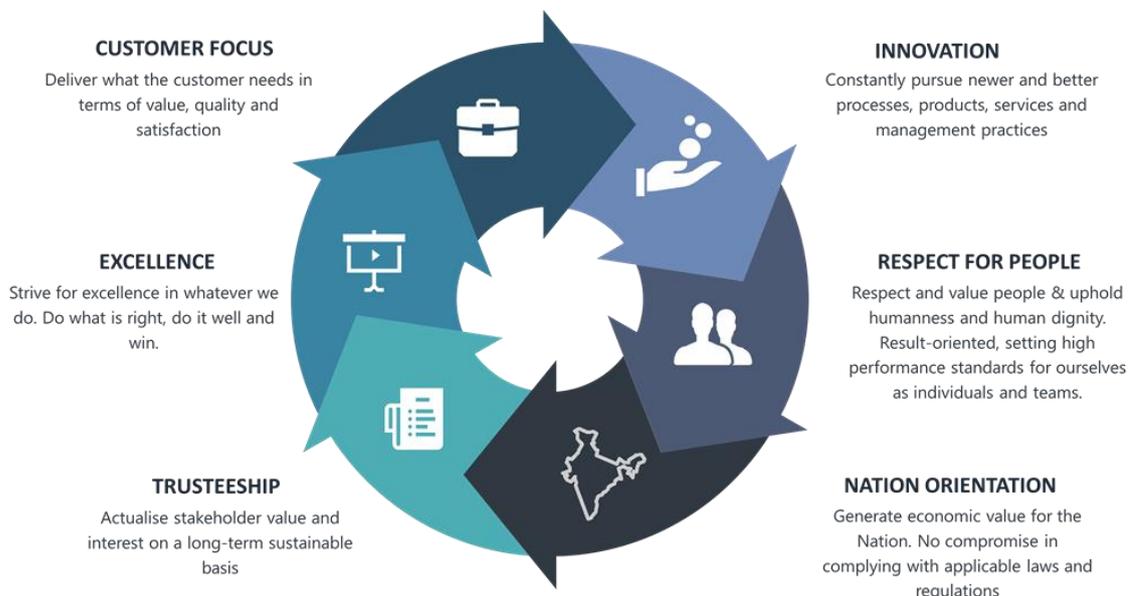
To sustain ITC's position as one of **India's most valuable and admired corporations** through **world-class performance**, creating **growing value for the Indian economy** and the **Company's stakeholders**.

Mission:

To enhance the wealth generating capability of the enterprise in a globalising environment, **delivering superior and sustainable stakeholder value**.

Q2. What are the Core Values of ITC?

ITC's core values are aimed at developing a customer focused, high-performance organisation which creates value for all its stakeholders.



Please refer <https://www.itcportal.com/about-itc/values/index.aspx#sectionb2>

Q3. How does the Company effectively manage a highly diversified business portfolio? What is the Company's Corporate Governance structure?

ITC's 'Strategy of Organisation' is crafted in a manner that enables focus on each business while harnessing the diversity of the portfolio to create unique sources of competitive advantage.

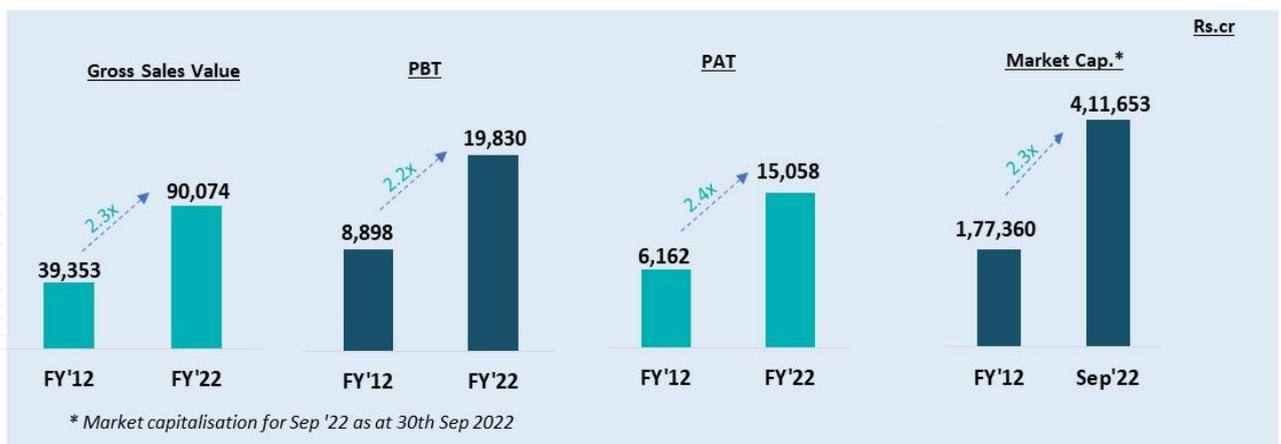
Please refer <https://www.itcportal.com/about-itc/values/index.aspx#sectionb4> for details of ITC's Governance Structure.

Q4. What are key elements of ITC's strategy?

ITC Next strategy is focused on creating structural drivers that will power the Company's next horizon of growth and ensure that the enterprise remains future-ready, consumer-centric and nimble.



Q5. What has been the financial performance track record of the Company over the last decade?



Growth largely organic and funded through Retained Earnings

Gross Sales Value includes all taxes (GST, Compensation Cess, VAT, Excise Duty, NCCD, etc.)

Q6. What has been the performance track record of the Company over the last 5 years?

- In FY22, the Company's EBITDA grew by 22.0% and Earnings Per Share (EPS) registered a growth of 15.4% & stood at Rs. 12.2 per share. During the five-year period i.e. between FY17 and FY22,
 - o The Company's EBITDA registered a growth of 30%
 - o The Company's EPS registered a robust growth of 45% in absolute terms from Rs. 8.4 to Rs. 12.2.

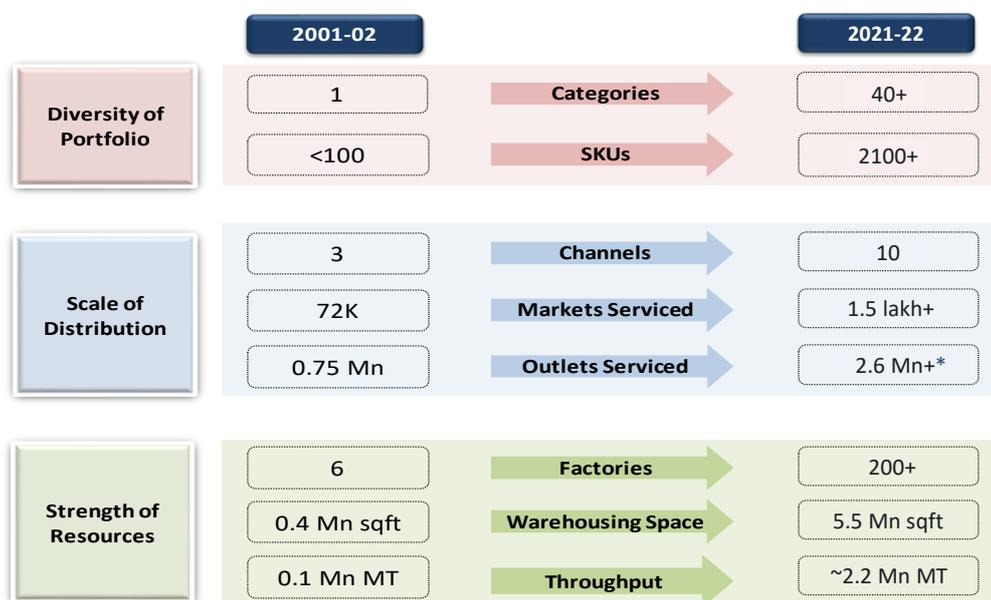
- The **Return on Segment Capital Employed (ROCE)** improved from 61% to **68%**.
- In the FMCG-Others segment, Segment EBITDA grew at a CAGR of 40% between FY17 to FY22. Segment **EBITDA margins expanded by ~650 bps since FY17**.

Q7. Please provide some dimensions of the Company’s transformation in the FMCG-Others segment over the years.

The Company remains focused on rapidly scaling up the FMCG businesses anchored on strong growth platforms and a future-ready portfolio powered by purpose-led brands and supported by agile innovation leveraging the robust R&D platforms of ITC Life Sciences and Technology Centre (LSTC). In addition to fortifying their core portfolio, the Businesses continue to address adjacent growth opportunities by leveraging the 25+ powerful mother brands established over the years. Simultaneously, the Businesses continue to make strategic investments in building categories of the future and establishing the Company’s ‘right to win’ by progressively scaling up those nascent categories where beachheads have been created.

The FMCG Businesses continue to create structural competitive advantages and enhance profitability by leveraging world-class distributed infrastructure, multi-channel distribution network, delayed operations, smart buying & value engineering and smart manufacturing anchored on the twin pillars of Digital and Sustainability.

ITC’s FMCG-Others Segment has grown manifold in scale, diversity of portfolio and in terms of resources deployed, as shown below:



*Serviced directly. Total reach approx 7 million outlets

Q8. Please provide some insight on how the company is strengthening its presence across distribution channels.

- The Company continues to strengthen its deep & wide multi-channel distribution network and sharpen channel-specific strategies to efficiently service consumer demand across the country. Critical insights into consumer behaviour and channel-specific trends gained over the years are being continuously leveraged to deliver competitive advantage through superior product availability, visibility and freshness. The rapid growth of Modern Trade & e-Commerce channels and the emergence of several new players in recent years, have also warranted crafting of differentiated market/outlet specific strategies, channel-specific assortments to seize the emergent opportunities.
 - Market and outlet coverage at appx. 2.0x and 1.3x of pre-pandemic levels.
 - e-Commerce channel continues to scale up rapidly leveraging account specific strategies, new product introductions (including e-Commerce first brands) and customized supply chain solutions; availability of products has been further expanded with new trade partners on Quick Commerce and Social Commerce platforms.
 - Modern Trade sales accelerated with resumption of activities, higher store footfalls and joint business planning with key accounts.
 - Presence in the Food Service and Institutional channels continues to be scaled up by leveraging existing partnerships and enhancement of product range. Tech-enabled cloud kitchens are also being piloted/progressed to actualise emergent opportunities.
 - Product availability and accessibility continues to-be augmented by leveraging new routes-to-market through multiple strategic partnerships covering a range of brands including 'B Natural', 'Sunfeast', 'ITC Master Chef', etc.
- The Company continues to strengthen presence in the rapidly emerging Direct to Consumer (D2C) space by leveraging 'ITC e-store' - the Company's exclusive D2C platform (<http://www.itcstore.in>) and supporting startups in the D2C segment.
- 'Unnati', the digitally powered eB2B platform, has been rolled out to over 4.4 lakh retailers facilitating sharp and direct engagement with retailers, superior analytics, personalised recommendations of hyperlocal baskets based on consumer purchase insights, and deeper brand engagement.

Q9. In the FMCG-Others Segment, please provide an overview of ITC's scale, offerings, Brands and market standing.

The Company's vibrant portfolio of over 25 world-class Indian brands, largely built through an organic growth strategy in a relatively short period of time, represents an annual consumer spend of over Rs. 24000 crores in FY22. The market standing and offerings under various brands are as detailed below:

Brand	Offerings	Market Standing
	- Atta, Salt & Spices	#1 in Branded Atta
	- Biscuits & Cakes	#1 in the Cream Biscuits
	- Bridges, Potato chips & Namkeens	#1 in Bridges Snacks

Brand	Offerings	Market Standing
	- Noodles & Pasta	#2 in Noodles
	- Educational & Stationery products	#1 in Notebooks
	- Matches, Dhoop & Agarbatti	#1 in Dhoop #2 in Agarbattis
   	- Soaps, Handwash, Bodywash, Fragrances & Deodorants, range of Health & Hygiene products	#1 in women's Deo #1 in Surface Disinfectant spray

Other key brands:



Q10. Please provide an overview of other Operating segments.

Hotels 2 nd largest Hotel Chain	AGRI No 1. Agri business Player	Paper Clear Market Leader
<ul style="list-style-type: none"> 114 properties with over 11,000 Keys One of the fastest growing hospitality chains in India Trailblazer in Green Hoteliering (All ITC Luxury Hotels LEED® Platinum certified) First 4 hotels in the world to receive the LEED® Zero Carbon Certification. 	<ul style="list-style-type: none"> Leading Agri Business player in India Pioneer in rural transformation (<i>e-Choupal</i>) Digitising Agri value chain with ITCMAARS – a crop-agnostic ‘phygital’ full stack AgriTech platform Largest procurer of Wheat after FCI No 1. leaf tobacco exporter in India (5th largest in World) 	<ul style="list-style-type: none"> No. 1 in Revenue No. 1 in Profitability World-class Environmental Performance Best-in-Class operating metrics
<ul style="list-style-type: none"> World’s first hotel chain to receive Platinum certification in infection risk management by M/s DNV World-class properties and iconic cuisine brands ‘Asset-right’ growth strategy Focus on sweating existing assets 	<ul style="list-style-type: none"> Best-in-class profitability Sourcing & Supply operations in 22 states Delivering competitive advantage to ITC’s Foods Business through distinctive sourcing capabilities World-class processing facilities Focus on scaling up Value-added segment (<i>Spices, Coffee, Aqua, MAPE, etc.</i>) 	<ul style="list-style-type: none"> Integrated Operations (BCTMP <i>first-of-kind in India</i>) Secure, sustainable & cost competitive fibre base (<i>Cumulative plantations @ over 9.5 lakh acres</i>) 44% of energy consumption from renewable sources

Q11. How does the Company choose new categories in the FMCG space? Which are the new categories it has forayed into in recent years?

The choice of category is guided by its growth prospects, profitability profile and the ability of the Company to effectively leverage its institutional strengths with a view to achieving leadership status within a reasonable time frame. Synergies with existing categories in terms of overlap of distribution reach, brand extension possibility, procurement efficiencies, etc. are considered while choosing new categories.

In the Branded Packaged Foods Businesses, Chocolates, Dairy, Coffee and Frozen Foods are some of the areas that the Company has entered into over the last few years. In the Personal Care Products Business, the Business has successfully entered the Hygiene space with the acquisition of ‘Savlon’ brand a few years ago and more recently, the ‘Nimyle’ brand in the Floor Cleaner segment.

Q12. Is the Company open to making acquisitions in order to accelerate growth in the FMCG segment?

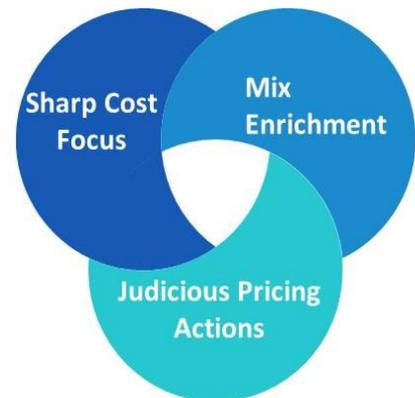
ITC examines prospects for inorganic growth that arise from time to time not only in this business segment but also in the other businesses, guided by considerations such as strategic fit, valuation, financial viability and ease of integration.

In recent times, the Company has acquired Brands such as ‘Savlon’, ‘Nimyle’ and ‘Charmis’ to strengthen its presence in Personal Care Products Business. In July’20, the Company **acquired 100% of the equity share capital of M/s Sunrise Foods Private Limited** (Sunrise), an Indian company primarily engaged in the business of spices under the trademark ‘Sunrise’.

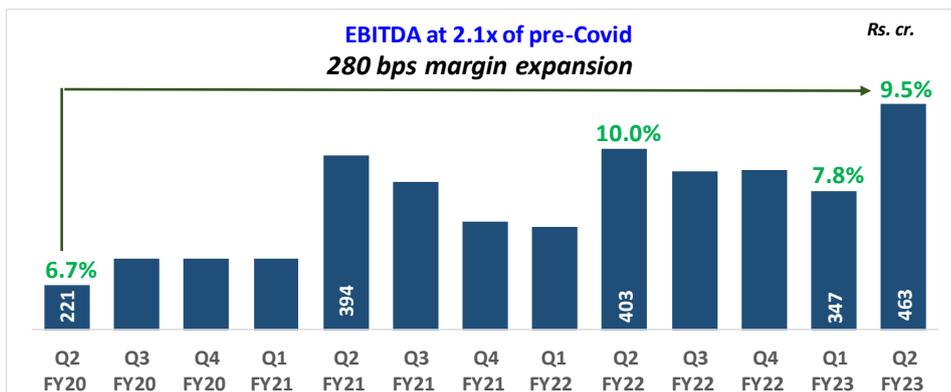
The Company shall continue to pursue opportunities for inorganic growth that are value-accretive and synergistic.

Q13. (a) Please update on the margin expansion trajectory in the FMCG-Others segment.

The **Segment EBITDA margins** of the FMCG-Others segment have been on an upward trajectory and have **moved up by ~650 bps (between FY17 to FY22)**. **Segment EBITDA for FY22 grew by 10% to Rs. 1449 crores**, with margins being sustained at 9.1% in spite of unprecedented inflationary headwinds. The unprecedented increase in prices of key inputs was mitigated through focused cost management interventions across the value chain, premiumisation, product mix enrichment, judicious pricing actions and fiscal incentives.



During the quarter ending 30th September, 2022, **Segment EBITDA margin** stood at 9.5% (Q1 FY23: 7.8%; Q2 FY22: 10.0%); the sharp escalation in input costs was mitigated through multi-pronged interventions viz. strategic cost management, premiumisation, supply chain agility, judicious pricing actions, fiscal incentives, leveraging digital and optimising channel assortments. **Segment EBITDA margins have expanded by 280 bps over Q2 FY20 (pre-pandemic) and by 170 bps over Q1 FY23 (sequentially)**.



Please refer to the Investor Presentation <https://www.itcportal.com/investor/pdf/ITC-Quarterly-Result-Presentation-Q2-FY2023.pdf>

(b) Please provide an overview of the margin profile of the Branded Packaged Foods Businesses and the Personal Care Products Business.

The Branded Packaged Foods Businesses of the Company comprise ‘Staples & Meals’, ‘Snacks’, ‘Dairy & Beverages’, ‘Biscuits & Cakes’ and ‘Chocolates, Coffee & Confectionery’. These Businesses **have evolved over a period of time and are currently at different stages of their lifecycles**. As such, the revenue dimensions, cost structures and profitability profiles of each of these businesses are distinct from one another. For example, **EBIT margin for the Staples Business**, which is a relatively mature category, is in the **high single digit range** while for **Snack Foods** the same is in the **mid-single digit range** representing upfront investments towards category development and brand building.

The Personal Care Products Business comprise ‘Personal Wash & Hygiene’, ‘Health’, ‘Fragrances’, ‘Home Care’, ‘Skin Care’ and ‘Talc’ categories. The Company continues to **make significant investments** in this Business primarily in the **area of brand building, R&D and product development** towards competing effectively with incumbent players comprising firmly entrenched MNCs and domestic companies.

Presently, each category is **operating at industry benchmarked gross margins**. With enhanced scale and consumer connect, each category is expected to earn best-in-class EBIT margins progressively over the medium-term.

Q14. Please provide an overview of the capex plan of the Company.

The Company’s capex plans **are directed primarily towards capacity gearing, productivity enhancement, ensuring the highest standards in quality and environment, health & safety, and R&D**.

In the FMCG-Others segment, in the recent years, the Company has been investing behind setting up **state-of-the-art owned integrated consumer goods manufacturing and logistics facilities (ICMLs)** across regions in line with demand projections. These ICMLs provide structural advantages such as enhancing market responsiveness, reducing the cost of servicing proximal markets, ensuring delivery of products fresher to the market and providing heightened focus on product hygiene, safety and quality. Currently, **ten ICMLs have been operationalized** and one more project is at an advanced stage. Going forward, over the next few years, additional investments in these ICMLs will be largely through equipment lines on a modular basis in line with demand growth.

In the Hotels Business, the planned investments in the current capex cycle has now been completed with the launch of ITC Narmada (a luxury 291-key hotel in Ahmedabad) in August’22.

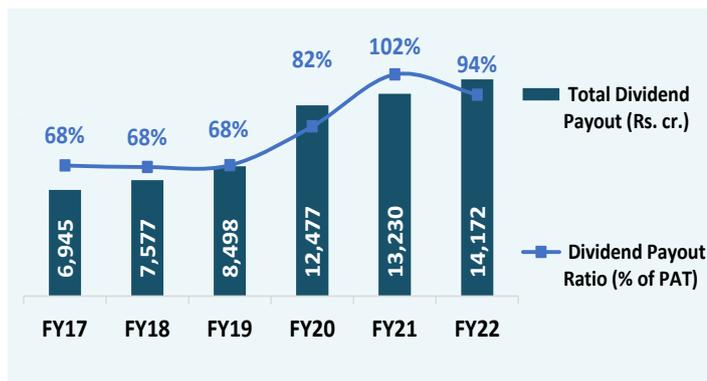
In line with its ‘asset-right’ strategy, the Business has generated, a healthy pipeline of management contracts under its brands viz. Welcomhotel, Mementos, Storii and Fortune, which is expected to be a key vector of growth. Properties under these brands are expected to be launched in a phased manner over the next few quarters. The Company remains committed to focus on sweating existing assets, create additional revenue streams and pursue alternate structures in line with industry recovery dynamics towards engendering the next horizon of growth as also enhancing value creation.

The major items of capital expenditure in the **Paperboards, Paper and Packaging segment** going forward comprise investments for gaining structural cost advantages in the segment and are in line with the growth needs of the Business.

In the short term, the Company shall primarily focus on timely completion/operationalisation of ongoing projects. The spends would be appropriately calibrated depending on several factors such as pick-up in economic activity and improvement in demand conditions.

Q15. What is the Dividend policy of the Company? What has been the trend of dividend payouts in recent years?

As per the Dividend Distribution policy approved by the Board of Directors on 18th March, 2020, effective financial year 2019-20, in the medium term, the dividend pay-out ratio is expected to be around 80% to 85% of the Profit After Tax of the Company. The Board may declare interim dividend(s) at its discretion. The



The Board's recommendation to the shareholders on the final dividend may include special dividend(s) as considered appropriate. At its meeting held on 18th May, 2022, the Directors have recommended Final Dividend of Rs. 6.25 per share for the financial year ending 31st March, 2022. Together with the Interim Dividend of Rs. 5.25 per share paid on 4th March 2022, the total Dividend for the financial year ended 31st March 2022 amounts to Rs. 11.50 per share (previous year: Rs. 10.75 per share). Total cash outflow on account of Dividends (including interim Dividend of Rs. 6469.48 crores paid in March 2022) will be Rs. 14171.51 crores.

Refer chart alongside for Dividends in the last 5 years.

Please refer to the following link for the Dividend Distribution policy of the Company. <http://www.itcportal.com/about-itc/policies/dividend-distribution-policy.pdf>

Q16. Please provide a brief overview of Q2 FY23 results.

Economic activity continued to gather momentum during the quarter along with improvement in business and consumer sentiments. However, input prices remained elevated even as some commodities witnessed softening in course of the quarter. Inflationary headwinds continued to weigh on consumption expenditure which was partly offset by early onset of festive season this year in some parts of the country.

Amidst such a challenging operating environment, the Company's focus on accelerated digital adoption, customer centricity, execution excellence and agility enabled it to continue to deliver strong growth across operating segments during the quarter, both sequentially and on YoY basis. The FMCG Businesses witnessed strong growth across channels and markets (both urban and rural) driven by ramp-up in outlet coverage, enhanced penetration and last mile execution. Gross Revenue stood at Rs. 16,971 crores representing a growth of 27.1% YoY while EBITDA at Rs. 5,864 crores also grew by 27.1% YoY. PAT grew by 20.8% YoY to Rs. 4,466 crores. Earnings Per Share for the quarter was Rs. 3.6 (previous year Rs. 3.0).

The anticipated moderation in inflation going forward, normal monsoon in most parts of the country and proactive interventions by the Government and RBI augur well for sustained recovery and a pick-up in consumption expenditure in the second half of the year.

Please refer to the quarterly Press Release and Investor Presentation uploaded on the Corporate Website for detailed segment wise update.

1. Quarterly Press Release: <https://www.itcportal.com/investor/pdf/ITC-Press-Release-Q2-FY2023.pdf>
2. Investor Presentation: <https://www.itcportal.com/investor/pdf/ITC-Quarterly-Result-Presentation-Q2-FY2023.pdf>

Q17. Please explain the Company's 'Triple Bottom Line' philosophy & Environment, Social & Governance (ESG) credentials



ITC believes that when enterprises make societal value creation an integral part of their corporate strategy, powerful drivers of innovation emerge that make growth more enduring for all stakeholders. At ITC, this paradigm is called 'Responsible Capitalism' - an abiding strategy that focuses on extreme competitiveness but in a manner that replenishes the environment and supports sustainable livelihoods.

The Company's innovative business models synergise the building of economic, environmental and social capital, thus embedding sustainability at the core of its corporate strategy. Today, this strategy has not only contributed to building strong businesses of the future as well as a portfolio of winning world-class brands, but also in making the Company a global exemplar in 'Triple Bottom Line' performance. The Company is the only enterprise in the world of comparable dimensions to have achieved and sustained the three key global indices of environmental sustainability of being 'water positive' (for 20 years), 'carbon positive' (for 17 years), and 'solid waste recycling positive' (for 15 years) and is a global exemplar in sustainability. This approach has enabled the Company and its businesses, to support sustainable livelihoods for more than six million people.

ITC has sustained its 'AA' rating for the 4th successive year by MSCI-ESG - the highest amongst global tobacco companies. The Company has also been included in the Dow Jones Sustainability Emerging Markets Index - a reflection of being a sustainability leader in the industry and a recognition of its continued commitment to people and planet. The Company has also been rated at the 'Leadership Level' score of 'A-' for both Climate Change and Water Security (Asia and Global average at B- for climate change and B for water security) by CDP, a reputed independent global platform for disclosures on environmental impacts.

As a testament to the Company's 'Triple Bottom Line' philosophy and Responsible Luxury ethos, ITC Windsor, Bengaluru achieved the distinction of being the first hotel in the world

to achieve LEED® Zero Carbon Certification. ITC Grand Chola, Chennai (largest hotel in the world to receive this), and ITC Gardenia, Bengaluru also received the LEED® Zero Carbon Certification during FY22. During the quarter Welcomhotel Bengaluru received the prestigious LEED® Zero Carbon certification by USGBC, reaffirming the Company's commitment to the ethos of 'Responsible Luxury'. These properties are the first four hotels in the world to receive the LEED Zero Carbon Certification.

The Company commissioned its first offsite solar plant in Dindigul, Tamil Nadu in FY22. The 14.9 MW solar plant (Phase I) will help reduce CO2 emissions significantly and has already enabled the Company to meet 90% of its electricity requirement in the state of Tamil Nadu from renewable sources. Additionally, the Company's Paperboards & Specialty Papers Business commissioned a state-of-the-art and future-ready High Pressure Recovery Boiler at the Bhadrachalam mill, replacing conventional soda recovery boilers, which will contribute towards reducing carbon footprint through lower coal consumption.

Refer link below for highlights:

<https://www.itcportal.com/investor/pdf/ITC-Quarterly-Result-Presentation-Q2-FY2023.pdf>

The Company is actively working towards its Sustainability 2.0 agenda which calls for inclusive strategies that can support sustainable livelihoods, pursue newer ways to fight climate change, enable the transition to a net zero economy, work towards ensuring water security for all and create an effective circular economy. With its bold Sustainability 2.0 ambitions, the Company is setting the bar higher with a multi-dimensional contribution to societal value creation, and remains committed to making a meaningful contribution to the Nation's future while retaining its status as a sustainability exemplar.

To achieve its Sustainability 2.0 vision, the Company continues to strengthen its management approach which is guided by a comprehensive set of sustainability policies and is being implemented across the organisation. The Company is also strengthening the mechanisms of engagement with key stakeholders, identification of material sustainability issues and progressively monitoring and mitigating the impacts along the value chain of each Business. Sustainability 2.0 broadly captures the theme of reducing resources utilisation, recycling, restoring the environment and replenishing. The Company will continue to update these systems and processes in line with evolving disclosure standards and Environmental, Social and Governance (ESG) requirements.

The Company's Sustainability & Integrated Report for FY 2021-22, in addition to conforming with Global Reporting Initiative (GRI) Standards, is also aligned with the requirements of the International Framework developed by the International Integrated Reporting Council.

Please refer to the following link

- **Sustainability & Integrated Report:**

<https://www.itcportal.com/sustainability/sustainability-integrated-report-2022/ITC-Sustainability-Integrated-Report-2022.pdf>

- **ITC Sustainability at a glance:**

<https://www.itcportal.com/sustainability/index.aspx>

In addition, the Business Responsibility & Sustainability Report (BRSR), as mandated by the Securities and Exchange Board of India (SEBI) for the year under review is annexed to the Report and Accounts 2022.

Q18. Please provide a brief on ITC's Digital journey.

ITC continues to build a dynamic 'Future-Tech' enterprise powered by state-of-the-art digital technologies and infrastructure across the value chain adding significant impetus to digital marketing, digital commerce, digital products and digital operations.

ITC today, is a pioneer in adoption of cutting-edge digital technologies across strategic impact areas spanning Intelligent new-age insights that reimagine Consumer Experience, Business Model Transformation, Smart Operations and Employee Experience. Initiatives such as 'DigiNext' and 'Young Digital Leaders Forum' are accelerating the Company's digital journey and inculcating a data driven and 'digital first' culture across the organisation.

The FMCG Businesses continue to increasingly leverage 'Sixth Sense', the Marketing Command Centre and Consumer Data Hub – an AI powered hyper-personalised platform backed by a robust partner ecosystem for content and data - to gain insights on market trends and consumer behaviour, and synthesise the same to craft contextual and hyper-personalised brand communication and product development. Over 3000 content assets have been deployed leveraging this capability within a relatively short span of time at significantly lower cost.

Cutting-edge digital technologies including Industry 4.0, Advanced Analytics, Big Data and industrial Internet of Things (IoT) continue to be deployed towards strengthening the Company's real time operations and execution platform. Several digitally powered interventions are underway towards enhancing productivity, driving efficiency and reducing costs. These initiatives are anchored on the key pillars of deepening trade & consumer connect, synchronised planning and forecasting, next generation agile supply chain, smart manufacturing and sourcing, and smart demand capture and fulfilment. Strategic investments are also being made towards enhancing value creation leveraging data and analytics. Key interventions include augmenting the Company's NextGen data architecture powered by Artificial Intelligence/Machine Learning (AI/ML), identifying and prioritising use cases for impactful outcomes and setting up a Data Science academy comprising data scientists and engineers to strengthen data and analytics programmes.

Towards enhancing the competitiveness of domestic agri-value chains, fostering new business models and further augmenting value creation opportunities, the Company has successfully launched ITCMAARS (Metamarket for Advanced Agriculture and Rural Services) – a crop-agnostic 'phygital' full stack AgriTech platform in nine states, with over 460 FPOs encompassing about 180,000 farmers already added to the Company's network. This initiative, powered by cutting-edge digital technologies, will create a robust eco system to deliver seamless customised solutions to farmers, whilst creating new revenue streams, strengthening sourcing efficiencies and powering the Company's world-class Indian brands. This digitally powered platform seeks to empower the farming community by delivering customised solutions through synergistically integrating NextGen agri-technologies. These include an e-Marketplace for agri inputs and farm outputs, wide range of advisory services covering weather forecasts, agronomy, best practices for improved productivity, quality assurance, etc. Value propositions across each of these opportunity spaces are expected to create new and scalable revenue streams for the Company over time. The Business expects to rapidly scale up the initiative to create a unique platform providing significant competitive advantage to the Company's Agri Business.

The Company's TM&D vertical continues to leverage cutting-edge digital technologies to drive productivity, improve market servicing, draw actionable insights for sharp-focused

interventions, augment sales force capability and deepen connect with retailers. Technology enablement in the form of customised mobility and routing solutions, machine learning algorithms, data science models, data analytics comprising insightful visualisation tools and predictive analysis are being increasingly leveraged to enable speedy and accurate data capture, enable real-time informed decisions and aid in scientific design of trade inputs to drive sales.

Several Robotic Process Automation BOTs are operational across businesses thereby eliminating non-value adding and repetitive work. Access to secure and contemporary platforms has been provided by seamlessly and securely implementing remote working for its employees through extensive IT enablement.



Notes

