

**Italian Stock Market  
Opportunities Milano**  
*Virtual Conference*

**January 14, 2021**

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# Today's speakers

**Luca  
Sburlati**



**CEO**

-  7 years in Pattern
-  13 years of Fashion & Luxury industry experience as a Top Manager
-  Education: Executive MBA Bocconi / Graduated International Political Sciences

**Innocenzo  
Tamborrini**



**CFO**

-  10 years in Pattern
-  18 years as CFO and Senior Controller
-  Education: Graduated in Economics

**Sara  
De Benedetti**



**Investor Relations Manager**

-  Joined Pattern in July 2018
-  9 years in communication, last 5 years focused on the International Fashion Industry
-  Education: MSc Bocconi in Economics



# Index



1. Group at a glance & Updates
2. The Luxury Fashion Market
3. Group Strategy & Outlook
4. Pattern and Sustainability
5. 1H 2020 Results
6. Appendix
  - Pattern Overview
  - Business and Values

# Group at a glance & Updates



# The Italian Hub of Luxury Fashion Engineering





# The Italian Hub of Luxury Fashion Engineering

## Pattern: Luxury Menswear

**Pattern S.p.A** is one of the most important operators in the field of **engineering, development, prototyping and production** of fashion lines for the most prestigious brands worldwide exclusively for the top luxury range, in the segment of fashion shows and main lines.

-  Quality, Speed, Flexibility, and Reputation
-  A solid focus on **Research & Development, technology and innovation**
-  A market leader in A **highly experienced** task force
-  A business model based on **sustainability**

*Client Loyalty  
Pattern S.p.A.*

<i>Period</i>	<i>Share</i>
<3 Years	7%
3-10 Years	12%
>10 Years	81%

## Roscini Atelier: Luxury Womenswear Engineering





**Studio Roscini** was born in the early '80s and became **one of the most important Italian companies in pattern-making of women's collections**.

In **2017 Studio Roscini joined Pattern Group** with a clear mission: follow each step of the collection development. The craftsmanship of the creations combined with the most advanced technology allows Roscini Atelier to achieve the perfect balance between quality and speed.

-  Quality, Speed
-  Flexibility and Reputation
-  A solid focus on **craftsmanship and innovation**

## Società Manifattura Tessile (S.M.T.): Luxury Knitwear

**S.M.T. s.r.l.**, based in Correggio (Reggio Emilia), began its activity in the luxury knitwear sector in 2010 and today it **is a leading company in prototyping, engineering and production of luxury knitwear**. In **2020 Pattern** completed the acquisition of 51% of SMT's share capital while the remaining 49% will remain property of Stefano Casini.

-  Excellence, Quality
-  Proactivity
-  A solid focus on **Research & Development**
-  120 cutting-edge machines and 20 shima/stoll technicians

# March 2020 – SMT enters Pattern Group

## Società Manifattura Tessile (S.M.T.): Luxury Knitwear

Pattern thus confirms the expected growth path and **announces the entry of S.M.T. in the Group**, this achievement will allow the Piedmontese company (Pattern) to **enter the luxury knitwear sector which up until now was not a part of the company's activities**. The union with this Italian company aims to **enhance the growth prospects of both companies**.

### OPERATION DESCRIPTION

- Acquisition of 51% of SMT's share capital by Pattern while the remaining 49% will remain property of Stefano Casini
- The equity value of S.M.T. has been fixed at € 10.8 million.
- The transaction price was set at € 5.5 million with a possible price adjustment linked to the closure of the 2020 financial statements of S.M.T. Srl.

## SOCIETÀ MANIFATTURA TESSILE (S.M.T.)

S.M.T. s.r.l, based in Correggio (Reggio Emilia), is a leading company in prototyping, engineering and production of luxury knitwear for top luxury fashion brands.

The company began its activity in the luxury knitwear sector in 2010 and today owns a unique technological park consisting of almost 120 weaving machines and a programming department made of over 20 technical programmers.

- 2019 Revenues €17.9 million (€11.3 million FY 2018)
- 2019 Adjusted EBITDA margin at €2.6 million and EBITDA Margin 14.5% (8.8% reported FY 2018)
- Negative NFP 2019 of around € 3.4 million (negative NFP of € 3.5 million FY 2018)








# Updates December 4, 2020

## The Ordinary and Extraordinary Shareholders' Meeting:

On 4<sup>th</sup> December 2020 was met the Shareholders' Meeting in ordinary and extraordinary sessions and approved:

-  The **distribution of a dividend**, gross of withholding tax, of € 0.05 per share, for a total of € 685,769.20;
-  The Shareholders' Meeting resolved on the **authorization to purchase and sell** treasury shares in complete compliance with European and Italian regulations in force and accepted market practice over time, up to a maximum of 10% of the share capital and for 18 months from the date of the shareholders' resolution. The authorization to sell the treasury shares is open ended;
-  Approved the **share capital increase** in one or more tranches, up to a maximum of € 15 million, including the share premium, to be undertaken by 31 December 2022, through contributions in kind, with the exclusion of option rights.

# The Luxury Fashion Market



# Market Update

## A positive competition: new entrant to the market

October 2020, born **Florence S.p.A**, luxury fashionwear production hub in Italy, competing with **Pattern Group**.

The holding, born thanks to the initiative of **Fondo Italiano d'Investimento** and private equity **Vam Investments**, aggregates **Giuntini S.p.A** of Peccioli (Pisa), luxury fashion outerwear specialist, with a turnover of €76.1 million in 2019 and € 9,7 million profit, **Ciemmecci Fashion srl** of Empoli (Florence), specialized in the production of leatherwear, €17.3 million turnover in 2018; and **Mely's Maglieria** di Arezzo, knitwear specialist, with a turnover of €15.5 million in 2019.

Next announced steps are the entering in the jersey fashionwear sector, then denim and bags businesses.

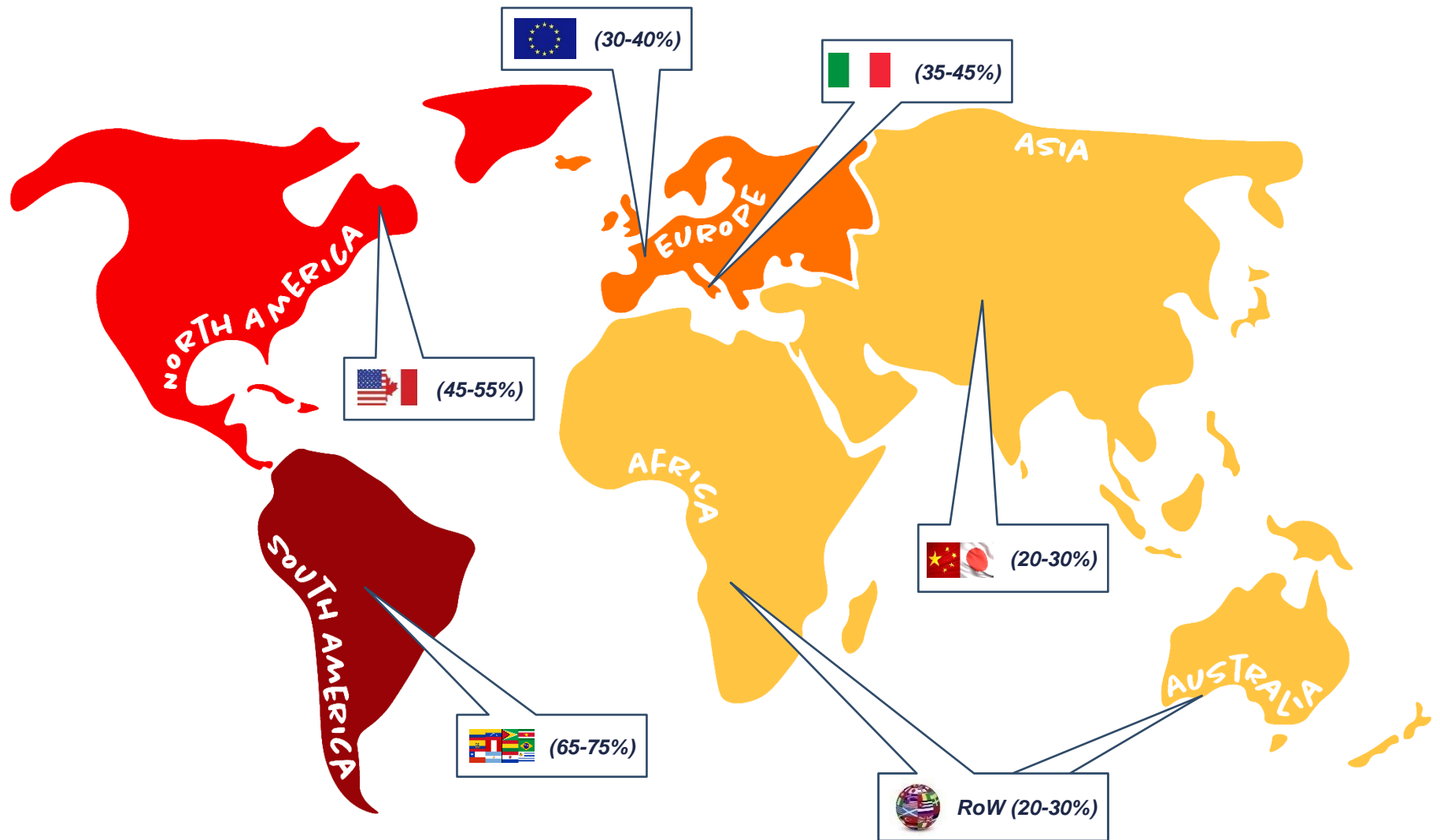
The consortium of investors, in which Italmobiliare also participates, will control 65% of the newly created holding Florence, which will own 100% of the three companies. The remaining 35% remains with the founding families, Giuntini, Capezzuoli, Maltinti, Ciampolini and Sanarelli, who have reinvested in the project

Turnover estimated at the end of the year of € 150 million and over 700 employees.

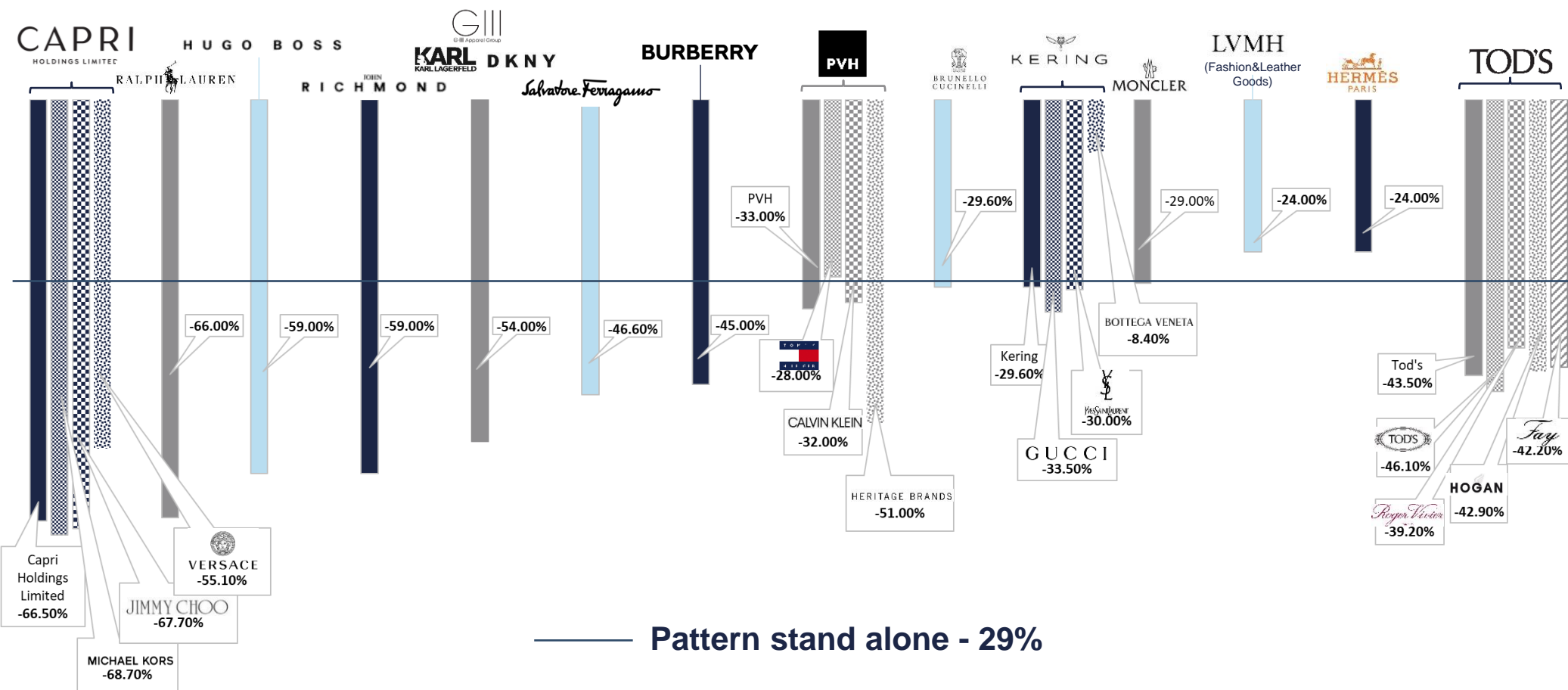
Strengths & Opportunities of Pattern:

- **Positive and winning strategy started in 2019**
- Competition creates a **reference benchmark** - always useful
- Florence is mainly a financial, not an **industrial, know-how-based pole**

# Luxury Fashion Market performance post COVID-19



# Luxury brands' performance\* post COVID-19 - September 2020

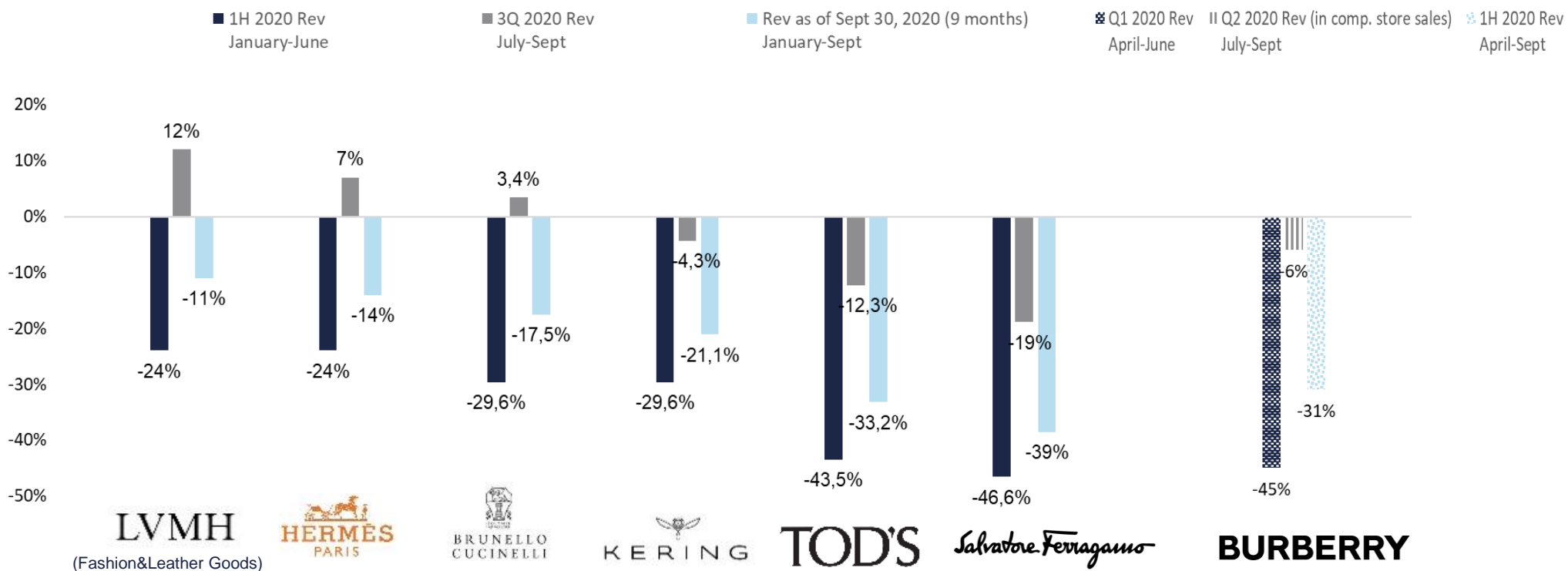


Sources: data published by the Companies

\* Update September 2020

# Luxury brands' performance trend – Updated results \*

## Luxury Fashion Trend

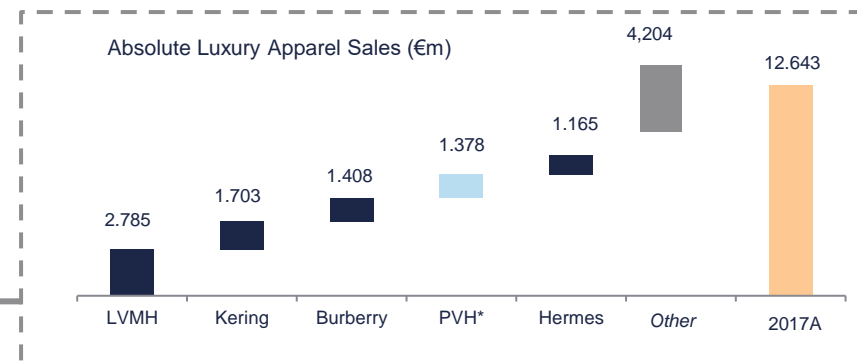




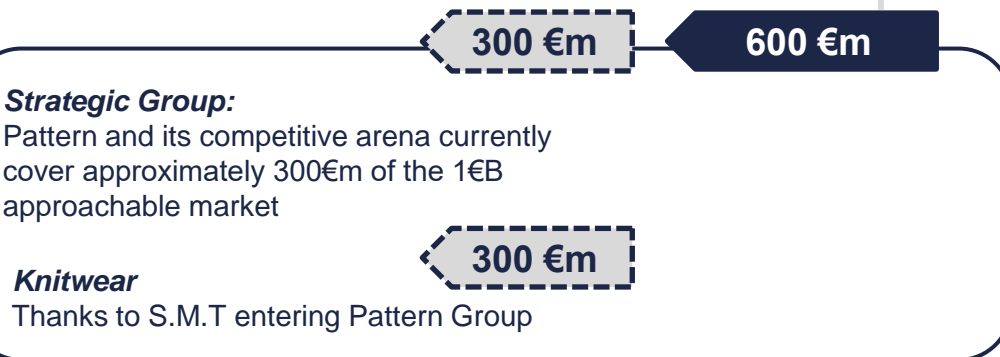
# The Luxury Fashion Market



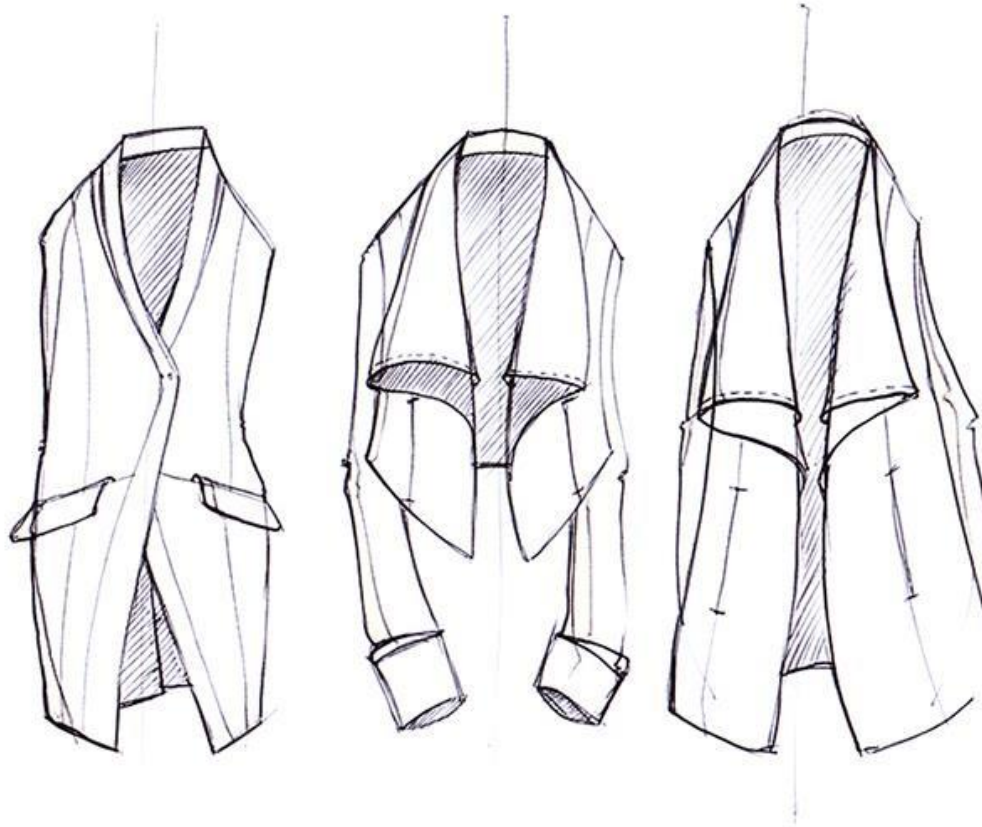
Net of the multiplier factor of 12x charged into the final price of absolute luxury fashion products



## Current competitive landscape



# Group Strategy & Outlook

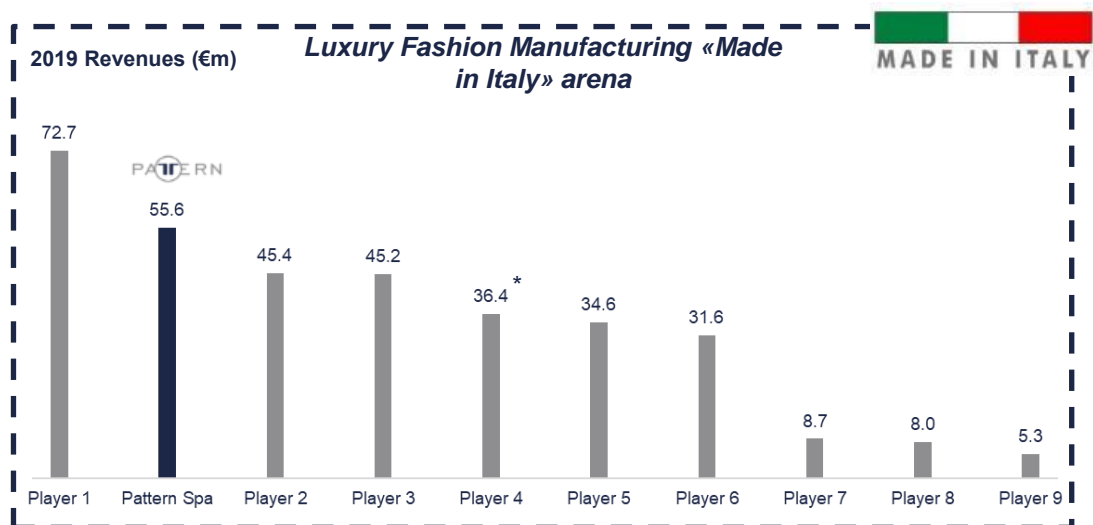


# Group Strategy

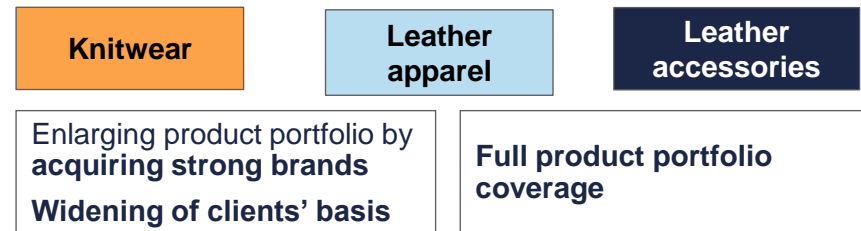


## Proceed with the growth of the Italian Hub of Luxury Fashion Engineering

### Organic Growth



### External Growth



# Stakeholder initiatives during COVID

## Local Community:

- Engineering and production of top-quality face mask for local community (3 plants Torino, Spello and Correggio)
- Direct support to design schools maintained during lock-down

## Employees:

- Implementation of a **strong working protocol** with several different preventions systems into our offices and facilities (mandatory temperature measurement / plexiglass barriers / spaces sanitations / creations of working shifts / mandatory use of mask also into offices since early February)
- Supply of face mask also for employees' families
- Strong use of **homeworking** across company
- Block of business trip since February
- Private Covid Insurance for employees

## Business recovery plan:

- Definition of **backup plan** in case of shutdown of one of the plant and complete support of the others
- Management self cutting salary** (25% CEO, 20% Mgmt Team)
- Use of **social safety nets** (cassa integrazione) for the 3 plants with an average of about 20% after lockdown and 90% during lockdown weeks

## Tax and Government:

- Notwithstanding the possibility given by the Covid Law (moratoria), it was decided – thanks to the positive cash – not to postpone tax payments or suspend leasings.

# Outlook 2020

The forecast for the second half of the year is **an economic trend in line with the first half, both in terms of volumes and margins** thanks to the social safety nets (cassa integrazione) and management's salary cut-off.

Regarding the **financial situation**, thanks to the reduction in net working capital and the related strengthening of the net financial position, we expect an **improvement compared to our records at 30 June**.

Regarding **Net Financial Position**, it should be noted that **at 31 August** it was **positive for € 5.7 million**, with an increase of 46% compared to the situation at 30 June 2020.

Waiting for a more vigorous recovery in 2021, this would be a positive result considering the international context and the actual economic situation.



# December 2020 - Pattern wins the "Premio dei Premi" 2020 award Prize is awarded by the President of the Italian Republic, Sergio Mattarella



Pattern is selected, amongst the winning companies of the XI Edition of “Imprese x Innovazione” award - organized by Confindustria. This prestigious recognition is awarded by the President of the Italian Republic, Sergio Mattarella, and established on behalf of the President of the Italian Republic within the Fondazione Nazionale per l’Innovazione Tecnologica COTEC (National Foundation of Technological Innovation).

The aim is to enhance the **best innovative and creative skills and to support the value of R&D and innovation** in every form and intensity.

Francesco Martorella - Founder & President of Pattern - receives the award from the President of the Italian Republic in the presence of Minister for Public Administration, Fabiana Dadone, the Minister for Technological Innovation and Digitization, Paola Pisano and the President of COTEC Foundation, Luigi Nicolais:

*"For the systematic research for a **balanced combination of sartorial craftsmanship and technological innovation** and for the development of an innovative strategy to **achieve sustainability and zero impact** on the environment".*



SUSTAINABILITY  
REPORT  
2019



PATTERN



# ESG RATING 2020

## PATTERN OVERPERFORMS THE MARKET

Pattern confirms its participation to the **Climate Change Reporting** managed by the international organization CDP and achieves a **2020 ESG Rating, referring to the year 2019, of level B-**.

An exceptional score, **almost unique in the fashion world** - especially in Italy - higher than the European regional average of C, and higher than the global "Textile&Fabric Goods" global sector average of D.

The ESG Rating is based on an in-depth assessment that involves three areas (Environment, Social Responsibility and Governance), always based on transparent parameters and measurable criteria and clear improvement objectives. Therefore, **only transparent companies** that improve themselves through measurable projects, can have in their sights the ESG Rating.

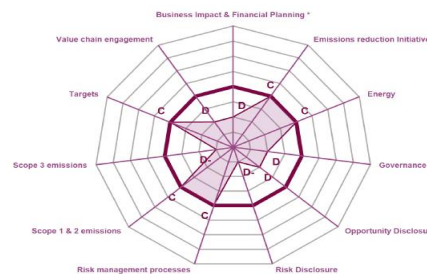
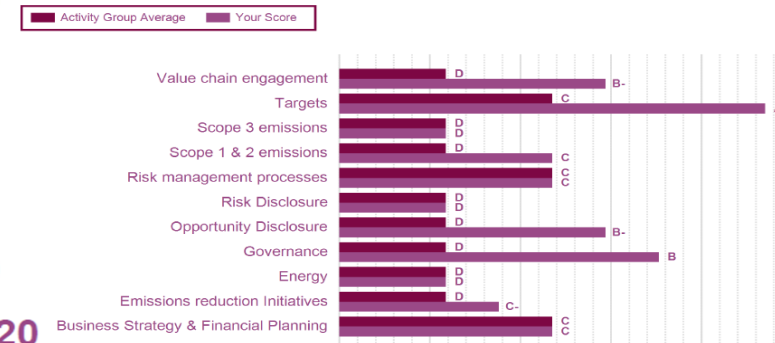
### CDP is recognized as the global standard of environmental reporting.

The British NGO has a strong reputation and receives its mandate from a pool of institutional investors.

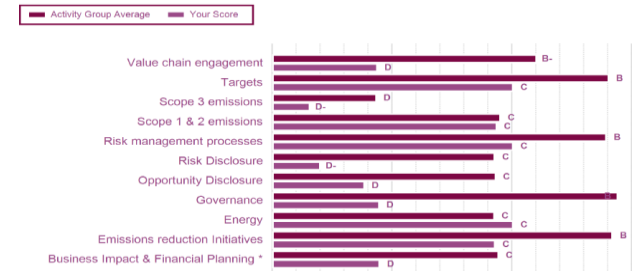
The market demand for corporate environmental transparency is louder than ever: 515 investors with US\$106 trillion in assets, and 150+ large purchasers with US\$4 trillion in buying power requested thousands of companies to disclose through CDP in 2020. They use CDP data, including scores, to inform their investment and procurement strategies.



#### CATEGORY SCORES BENCHMARKING



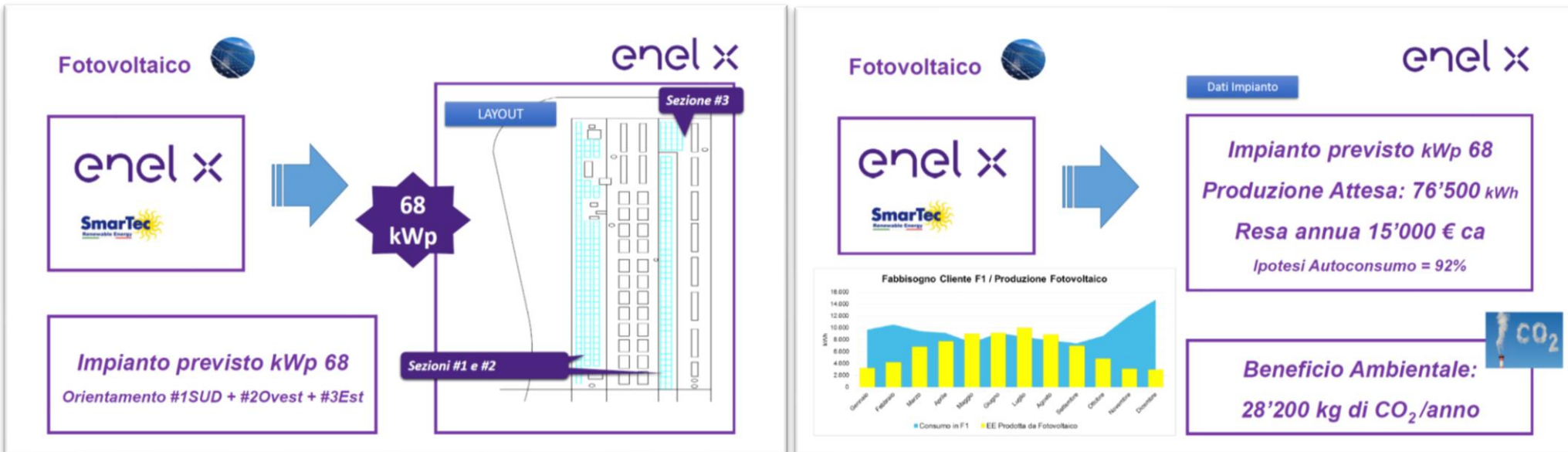
#### CATEGORY SCORES BENCHMARKING



# PHOTOVOLTAIC PLAN

In May 2020 Pattern accomplished the installation of the photovoltaic plant, now 100% operating

The plant makes the company almost completely self-sufficient, fully covering energy needs in the warmer months. With the achievement of this goal, **Pattern avoids 28 tons CO2 emissions every year** and continues the path to become **totally sustainable and 0 emissions by 2023**.



# FROM RED TO GREEN CARPET

“From Red to Green Carpet” is a **five-year plan** announced in 2018 by Pattern.

The aim is to create the same luxury but drastically reducing the impact on the environment without compromising the quality.

Pattern has identified three main goals to achieve:



With this project Pattern is facing an important challenge: creating value from sustainability. In order to achieve these ambitions Pattern aims to involve suppliers through its actions, including them in a path of raw materials and workers sustainability, by trying to improve the environment in which they operate.

# PATTERN RESPONDS TO THE UN INVITATION



ESG Certified Company



**SUSTAINABLE  
DEVELOPMENT GOALS**

**17 GOALS TO TRANSFORM OUR WORLD**

## **Goal 5:**

Achieve gender equality and empower all women and girls



## **8 DECENT WORK AND ECONOMIC GROWTH**



## **Goal 8:**

Promote inclusive and sustainable economic growth, employment and decent work for all

## **Goal 9:**

Build resilient infrastructure, promote sustainable industrialization and foster innovation

## **9 INDUSTRY, INNOVATION AND INFRASTRUCTURE**



## **12 RESPONSIBLE CONSUMPTION AND PRODUCTION**



## **Goal 12:**

Ensure sustainable consumption and production Patterns

Pattern has decided to respond to the UN challenges by **identifying 4 goals to work immediately on**, with the aim of contributing to make our world sustainable and achieve the “**2030 Agenda for Sustainable Development**”.



# PATTERN ADHERES TO THE ONU'S "FASHION INDUSTRY CHARTER FOR CLIMATE ACTION"



Pattern is the first Italian company to join the **UNFCCC's Fashion for Global Climate Action** initiative as a signatory to the **Fashion Industry Charter for Climate Action**.

The initiative calls on the Fashion industry to acknowledge the contribution of the sector to climate change and the responsibility to strive towards climate neutrality for a safer planet. By signing the Charter, Pattern has demonstrated the **commitment to playing its part to ensure the fashion sector is on the path to a low-carbon future**.

In line with the principles enshrined in the Charter and the aims of the Paris Agreement, **Pattern commits to a 30% GHG emissions reduction by 2030** and will strive to de-carbonization of the production phase, selection of climate friendly and sustainable materials, low-carbon transport, consumer dialogue and awareness, work with the financing community and policymakers to catalyse scalable solutions, and explore circular business models.



# 1H 2020 Results



# 1H 2020 Highlights



€ mln

Revenues  
**€ 24.5**  
+14%<sup>1</sup>

EBITDA  
**€ 2.5**  
+22%<sup>1</sup>

EBITDA margin  
**10.2%**

Net Income  
**€ 1.3**  
+5%<sup>1</sup>

POSITIVE NFP  
**€ 3.9**  
€ 12.4 m<sup>1</sup>

“

COVID has been having a significant impact on the entire luxury fashion sector and this obviously also affects the first half of Pattern.

However, we are **proud to present a result in line with that of the most performing luxury players**, thanks to the **fundamental contribution of S.M.T.** - from this year in the Pattern Group - to a light cost structure as it is mainly composed of variable costs, to the use of social safety nets (cassa integrazione) and the voluntary reduction of remuneration agreed by all management.

This allows us to continue without hesitation on our path towards the **creation of the Italian Hub of Luxury Fashion Engineering** and to confirm the strategic investments already planned regarding sustainability, technology and innovation.”

”

Luca Sburlati, Group CEO



# 1H 2020 Highlights: A focus on SMT



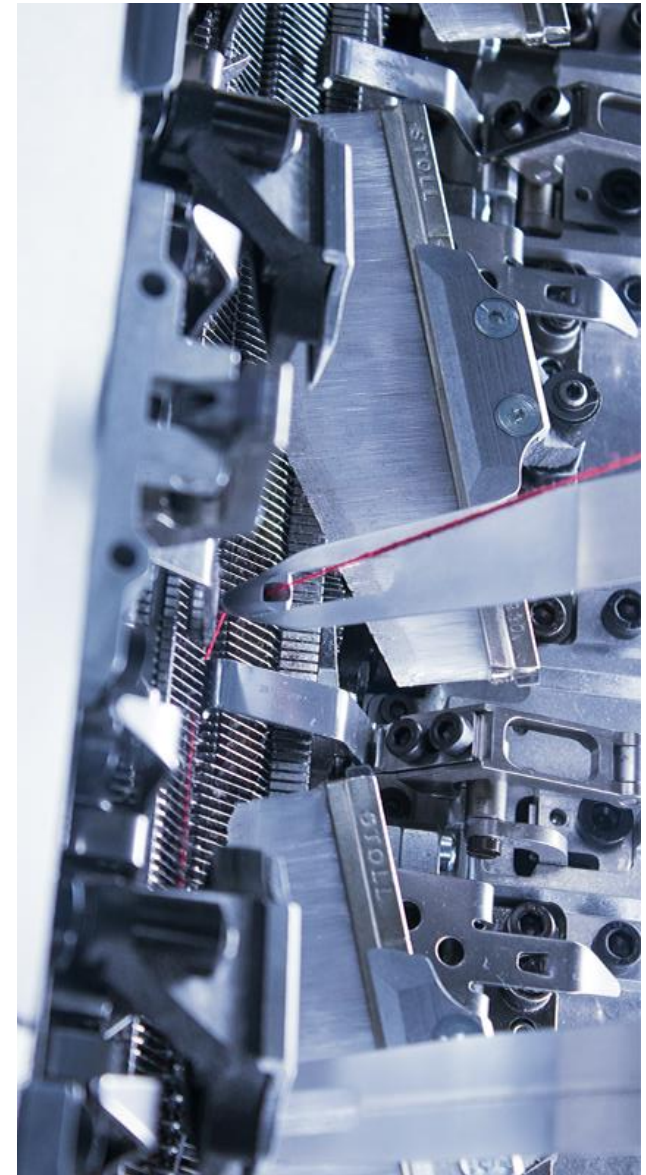
€ mln

Revenues  
**€ 9.2**

EBITDA  
**€ 1.2**

EBITDA margin  
**13%**

NFP  
**(€ 3.8)**



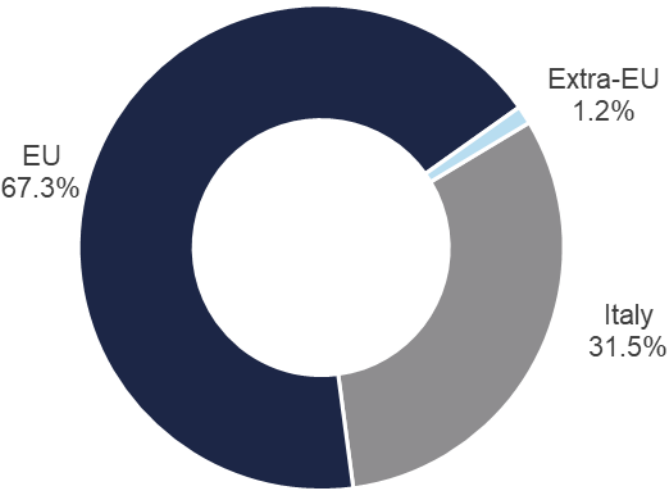
# 1H 2020 Income Statement

(€ 000)	1H 2020	1H 2019	%
Sales revenues	23,808.8	21,520.4	11%
Other revenues	728.7	33.3	2089%
<b>Total Revenues</b>	<b>24,537.5</b>	<b>21,553.7</b>	<b>14%</b>
Change in inventories	580.0	3,565.8	-84%
<b>Value of production</b>	<b>25,117.5</b>	<b>25,119.5</b>	<b>0%</b>
Raw materials	(6,969.2)	(10,461.1)	-33%
Change inventories raw materials	158.3	1,841.0	-91%
Cost of services	(9,081.6)	(9,845.8)	-8%
Leases and rentals	(732.6)	(259.8)	182%
Personnel Expenses	(5,906.3)	(4,288.6)	38%
Other operating expenses	(94.1)	(66.9)	41%
<b>EBITDA</b>	<b>2,492.0</b>	<b>2,038.3</b>	<b>22%</b>
<i>EBITDA margin</i>	<i>10.2%</i>	<i>9.5%</i>	
D&A	894.9	215.4	315%
<b>EBIT</b>	<b>1,597.1</b>	<b>1,822.9</b>	<b>-12%</b>
<i>EBIT margin</i>	<i>6.5%</i>	<i>8.5%</i>	
Net financial income	(60.6)	(37.5)	62%
<b>EBT</b>	<b>1,536.6</b>	<b>1,785.4</b>	<b>-14%</b>
Taxes	(230.3)	(544.5)	-58%
<b>Net income</b>	<b>1,306.3</b>	<b>1,240.9</b>	<b>5%</b>

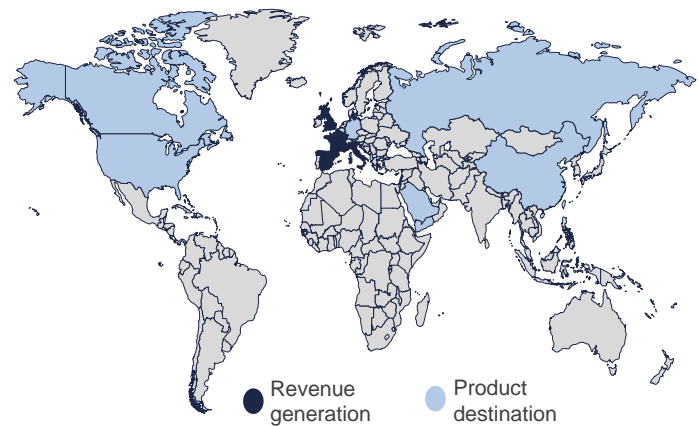
- **Revenues** at 30 June 2020 amount to € 24.5 million compared to € 21.5 million at 30 June 2019, showing an increase of around 14%.
- **EBITDA**, amounted to € 2.5 million compared to € 2.0 million at June 30, 2019, showing an increase of 22%. **EBITDA margin** at 10.2% compared to 9.5%.
- **Net income for the period** at € 1.3 million compared to € 1.2 million at June 30, 2019, showing an increase of 5%.

# Revenues Breakdown

(€ 000)	1H 2020	1H 2019
Italy	31.5%	14.1%
EU	67.3%	85.3%
Extra-EU	1.2%	0.6%
Total	100.0%	100.0%



Geographic footprint



The geographical breakdown of sales shows a significant **increase in revenues from Italian clients**, whose share of the total has more than doubled, rising from 14.1% to 31.5%. **The internationalization rate of S.M.T. is high**, but lower than that of Pattern. Overall, the foreign share of sales revenues remains very high, since it stands at 68.5%.

# 1H 2020 Balance Sheet (Use and Sources)

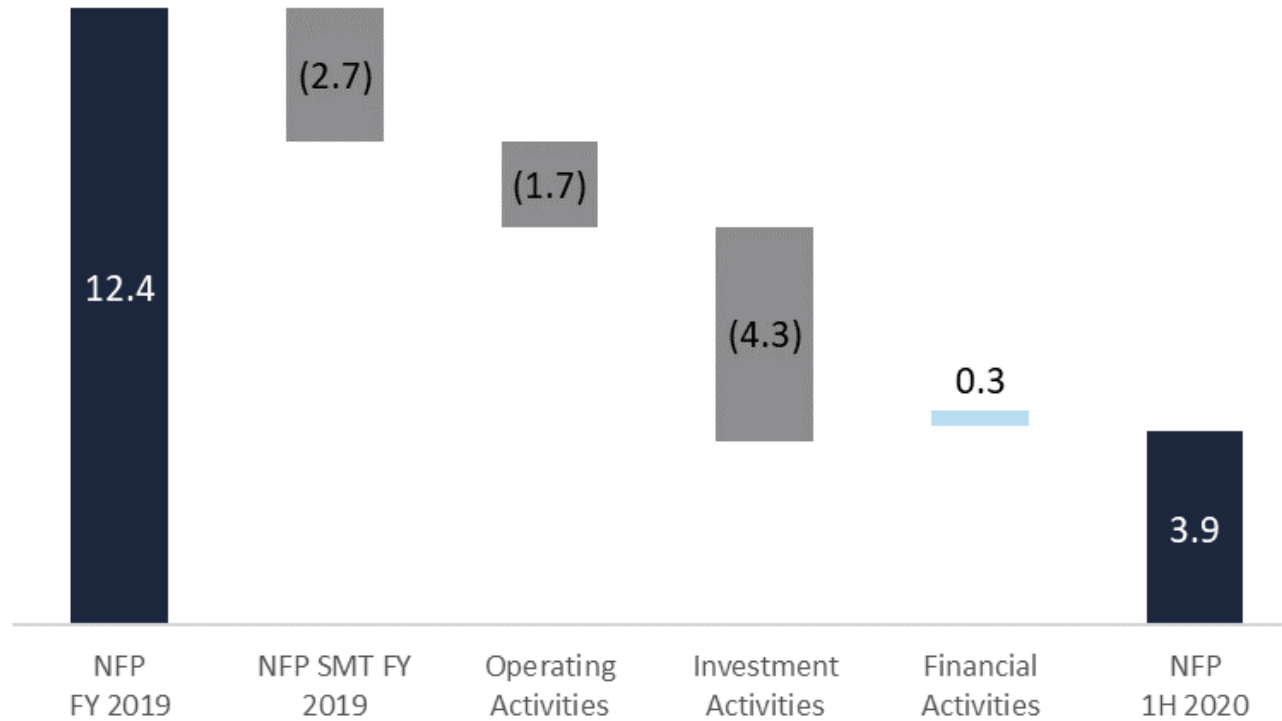
(€ 000)	30-giu-20	31-dic-19
<b>Fixed Assets</b>	<b>10,457.2</b>	<b>3,589.3</b>
Warehouse	5,201.1	3,435.0
Trade Receivables	9,250.6	8,005.6
Other Receivables	2,659.0	1,332.0
Prepayments and accrued income	718.9	512.5
<b>Working Capital</b>	<b>17,829.5</b>	<b>13,285.0</b>
Trade Payables	(7,291.2)	(8,894.4)
Other Payables	(3,170.2)	(2,021.0)
Accrued expenses and deferred income	(75.8)	(22.5)
<b>Net Working Capital</b>	<b>7,292.3</b>	<b>2,347.0</b>
Funds	(1,751.2)	(928.1)
<b>Net Invested Capital</b>	<b>15,998.2</b>	<b>5,008.1</b>

(€ 000)	30-giu-20	31-dic-19
<b>Shareholders' Equity</b>	<b>19,930.3</b>	<b>17,393.7</b>
<b>Cash and Cash equivalents</b>	<b>(17,923.3)</b>	<b>(16,073.9)</b>
Short term bank debt	4,213.5	925.8
Medium term financial debt	9,777.7	2,762.5
<b>Bank Debt</b>	<b>13,991.2</b>	<b>3,688.3</b>
<b>Net Debt/(Cash)</b>	<b>(3,932.1)</b>	<b>(12,385.6)</b>
<b>Total Sources</b>	<b>15,998.2</b>	<b>5,008.1</b>

- Also in terms of assets, the acquisition of 51% of S.M.T. has brought substantial **changes due to the different structure of the latter which reflects greater vertical integration with respect to Pattern**, which has resulted in greater fixed capital - especially for investments in machinery - and greater working capital, due to the lower variability of operating costs.
- The amount of **fixed assets of € 10.5 million grew by 191%** compared to € 3.6 million at 31 December 2019. Investments concerned intangible and tangible fixed assets. The former mainly refer to the recognition of the consolidation difference (€ 4 million). The increase in tangible fixed assets, on the other hand, is a consequence of the consolidation of S.M.T. **Financial fixed assets underwent a reduction of about 80%**, following the loss of the security deposit paid in December last year under the framework contract signed for the purchase of the stake in S.M.T.
- Net working capital increased considerably, from € 2.3 to € 7.3 million, registering a + 211%.** This increase is explained by the expansion of the consolidation area but also with a higher working capital than the turnover of S.M.T. Finally, the lock-down due to Covid-19 also had an impact on the extent that production was postponed by a month and this contributed to keeping the working capital of the latter company higher. The net invested capital at 30 June 2020 was approximately € 16 million, compared to € 5 million at 31 December 2019, with a consequent increase of 219%.
- The **structure of the sources of capital also changed due to the different consolidation area.** Shareholders' equity increased by 15% from € 17.4 million to € 19.9 million.

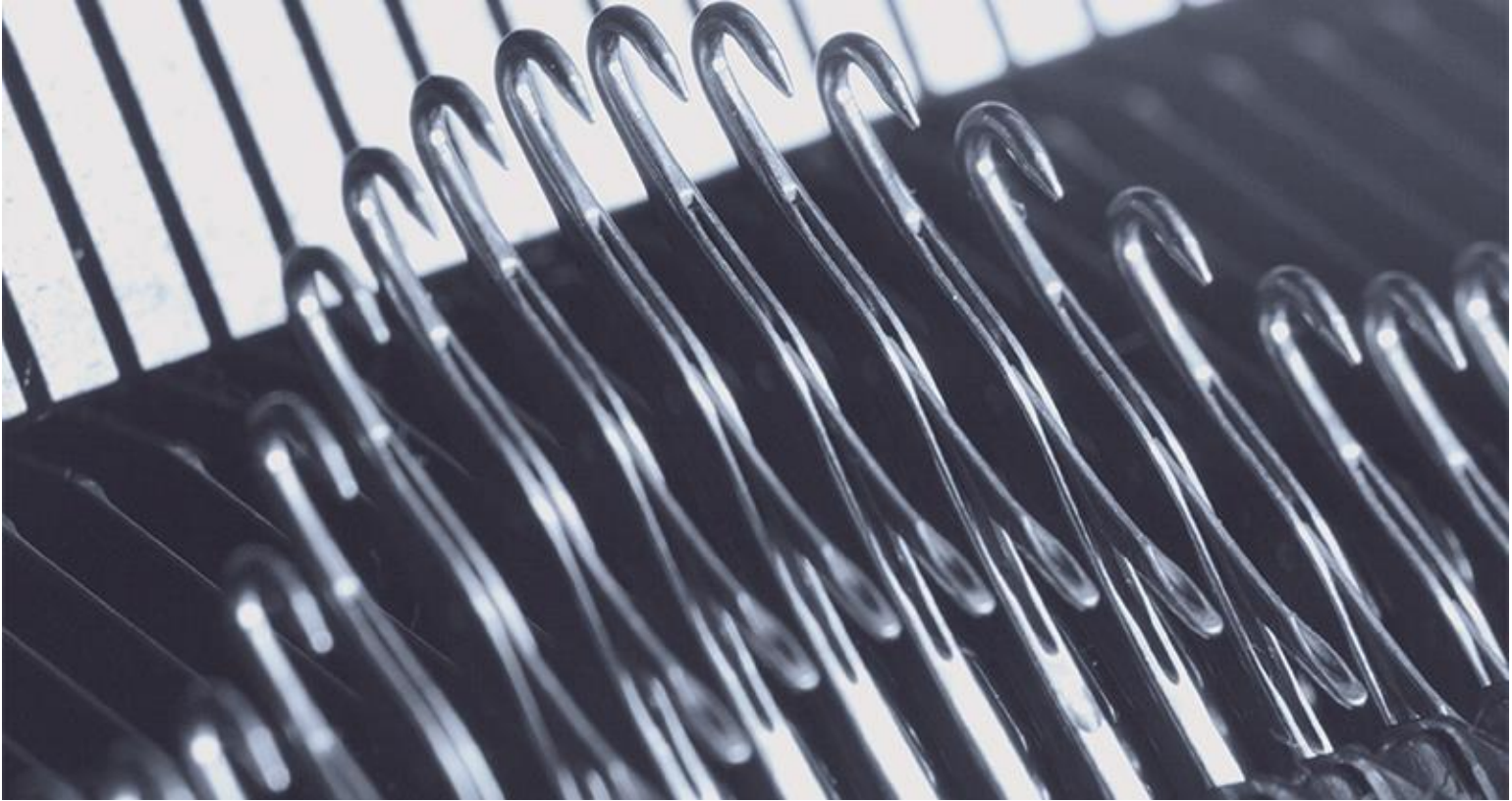


# NFP Bridge



**Group's cash and cash equivalents, equal to approximately € 18 million**

# Appendix



# 1. Pattern overview



# History of Continuous Growth



Set up of the **Collegno plant**

First Italian brand to obtain the SA8000 Social Accountability Certificate



First Sustainability Report (GRI index)

Acquisition of **Roscini – Spello plant**, reinforcing the women segment



Borsa Italiana **IPO**



Pattern was **established in 2000** by Fulvio Botto and Francesco Martorella

Acquisition of the **tailoring production unit**, Buble, focused on handmade garments

Acquisition of **Esemplare brand**, specialized in sport/urban collections

**ESEMPLARE**

Beginning of managerialization process with **Mr Sburlati joining the team**

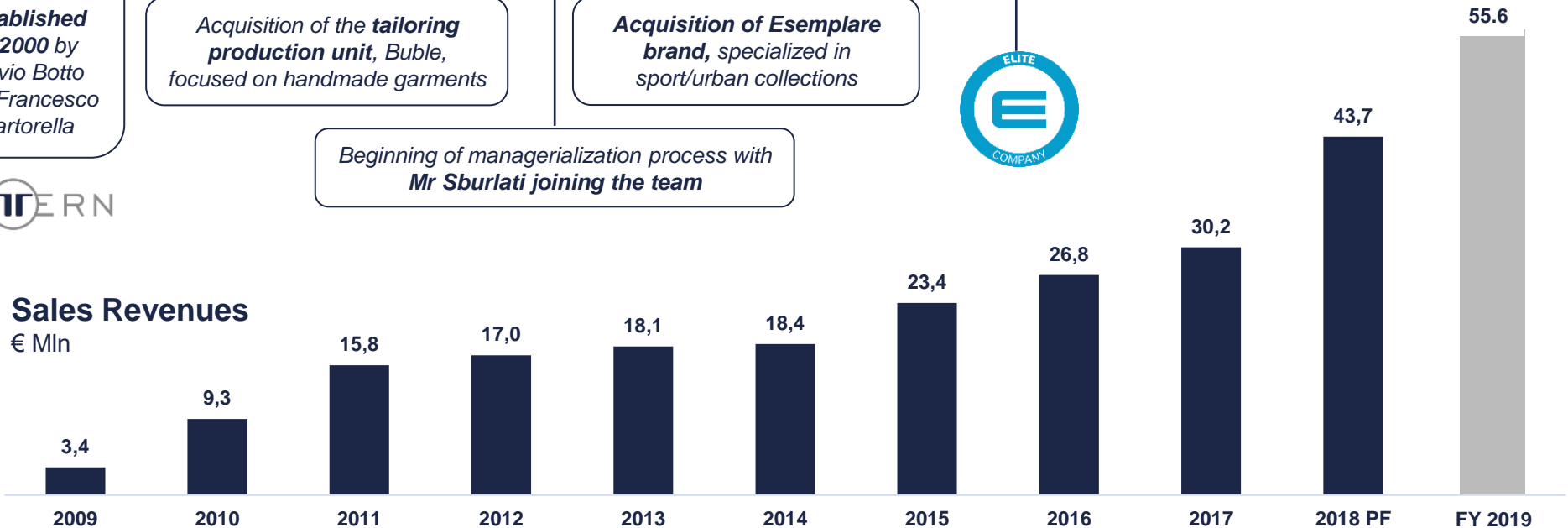
Acquisition of **S.M.T. Pattern** enters the luxury knitwear sector



**PATTERN**

## Sales Revenues


€ Mln

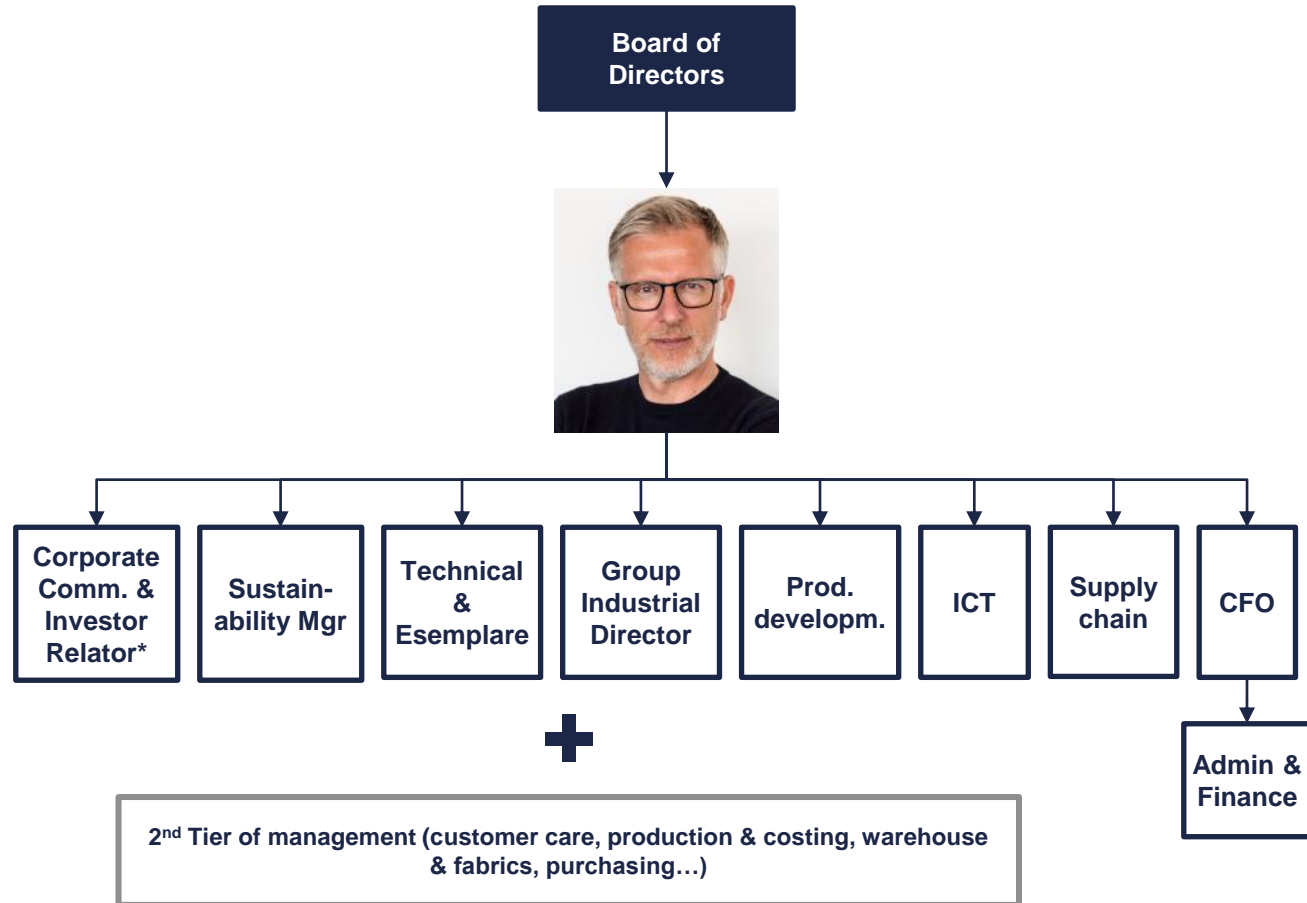


# HR - Highly Experienced and Committed Management Team



F. Botto and F. Martorella, founders and owners, are **recognized and valued professionals among fashion industry**, having cooperated with some of the most **prestigious brands** (i.e. Armani, Valentino)

 The two have **rapidly built a team of highly skilled personnel** thanks to a constant knowledge sharing approach and internal training of staff which ensure protection and leverage of their heritage

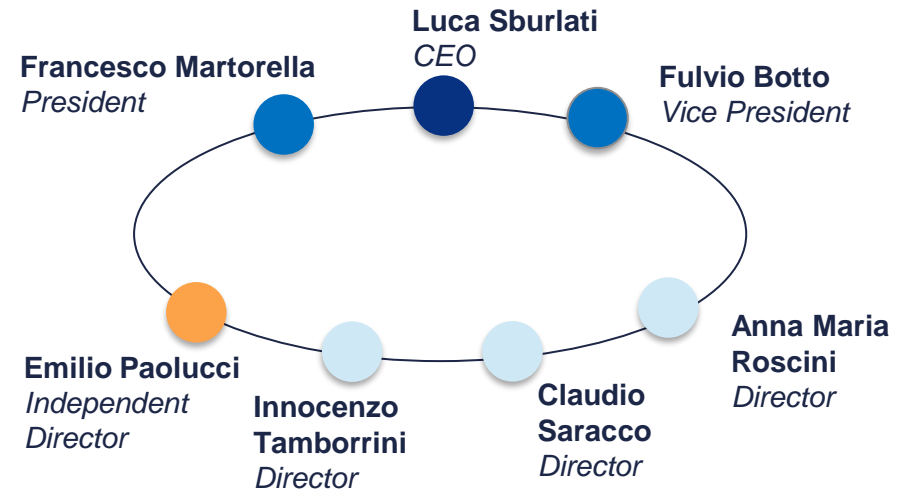


**Sole player, in its competitive arena, to have adopted a modern management structure as a key competitive advantage**

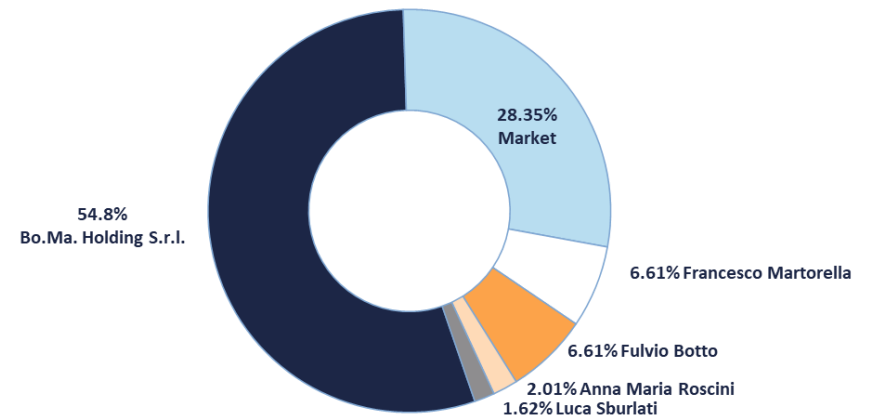
# Corporate Governance



## Board of Directors



## Shareholder Structure



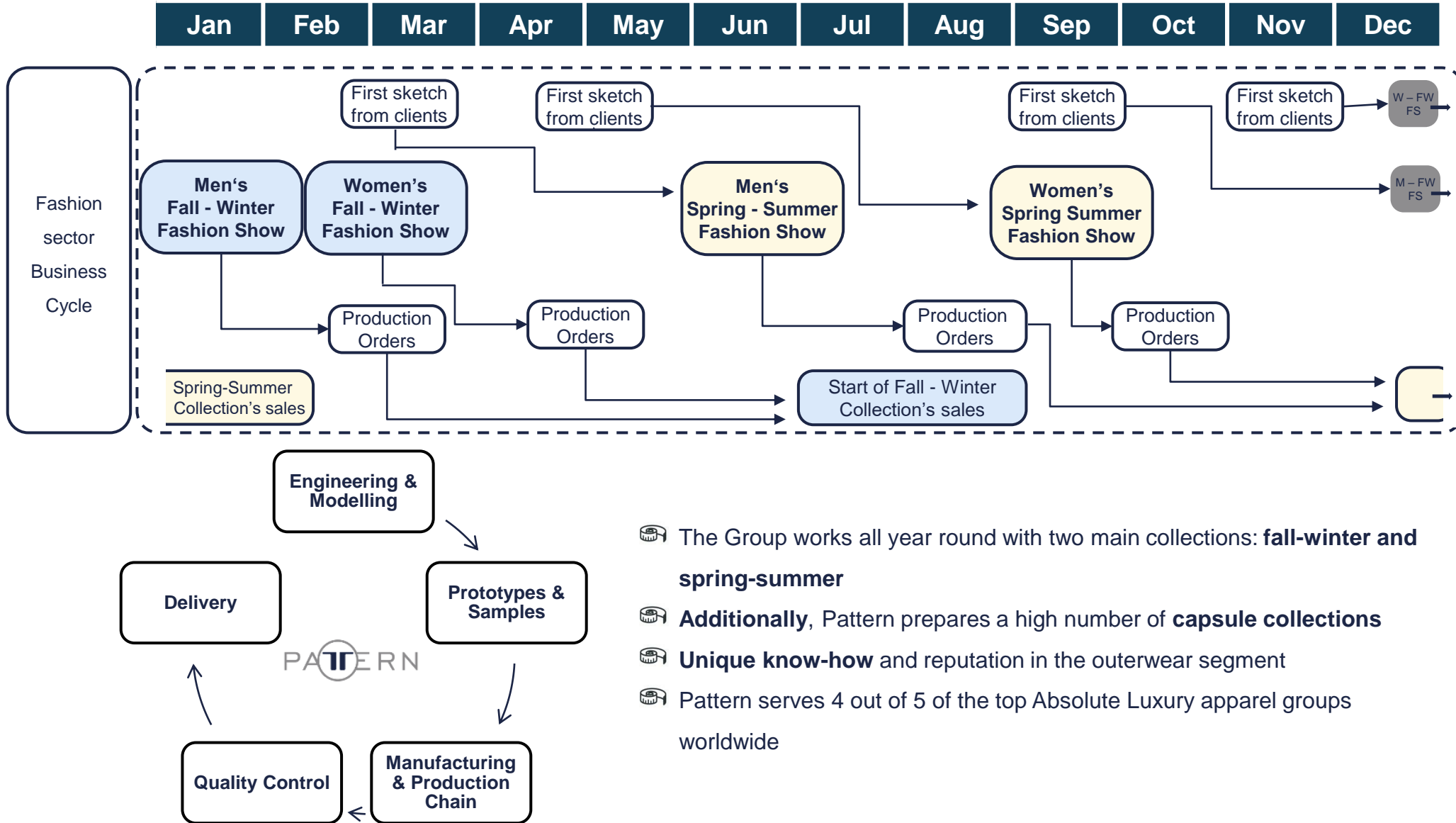


## 2. Business and Values



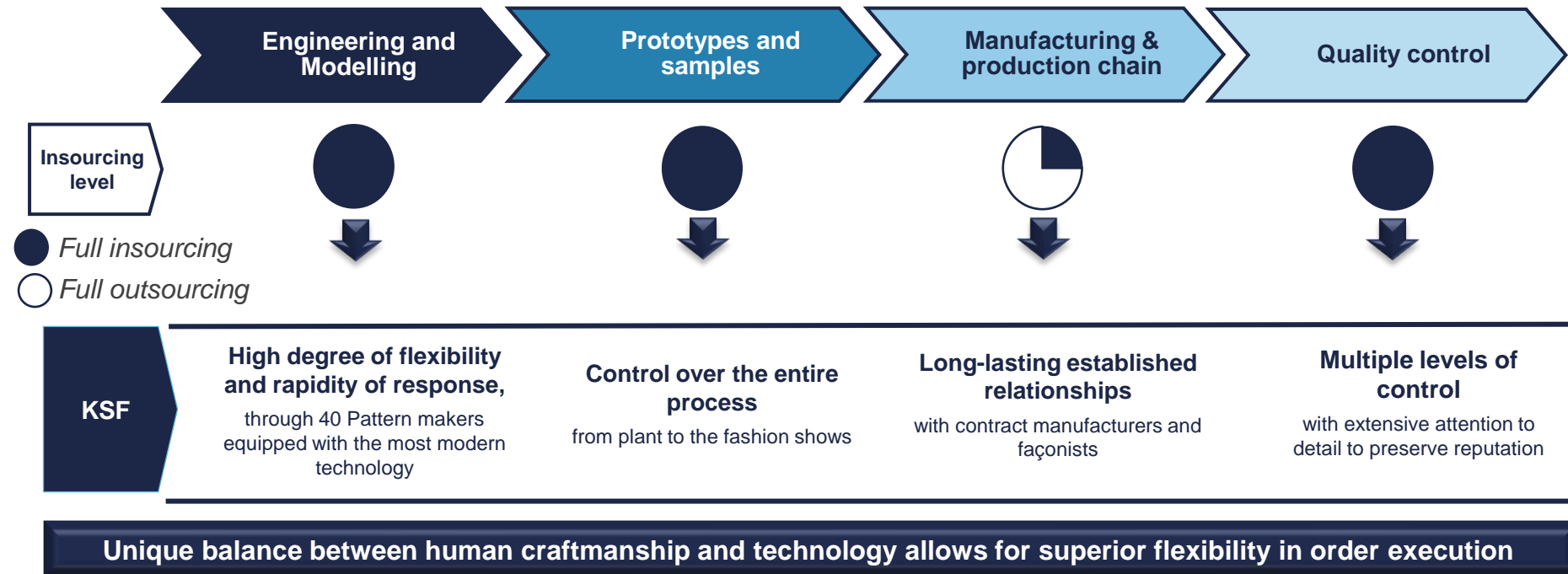


# How the fashion sector works



- 📞 The Group works all year round with two main collections: **fall-winter** and **spring-summer**
- 📞 **Additionally**, Pattern prepares a high number of **capsule collections**
- 📞 **Unique know-how** and reputation in the outerwear segment
- 📞 Pattern serves 4 out of 5 of the top Absolute Luxury apparel groups worldwide

# Pattern's business model



## Competitive Advantages

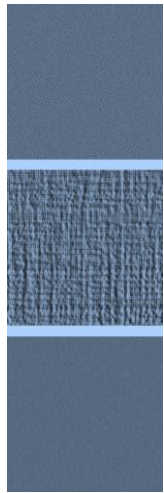
Quality	Flexibility	Speed	Reputation
Highest quality through technology, human resources and control of the supply chain	Flexible organizational structure with vertical integration	Superior time-to-market, thanks to newest technologies and proven procedures	20 years heritage of a fine-tuned business model for the luxury apparel industry

***Pattern operates in a strategic stage of the process, the "Formula 1"***

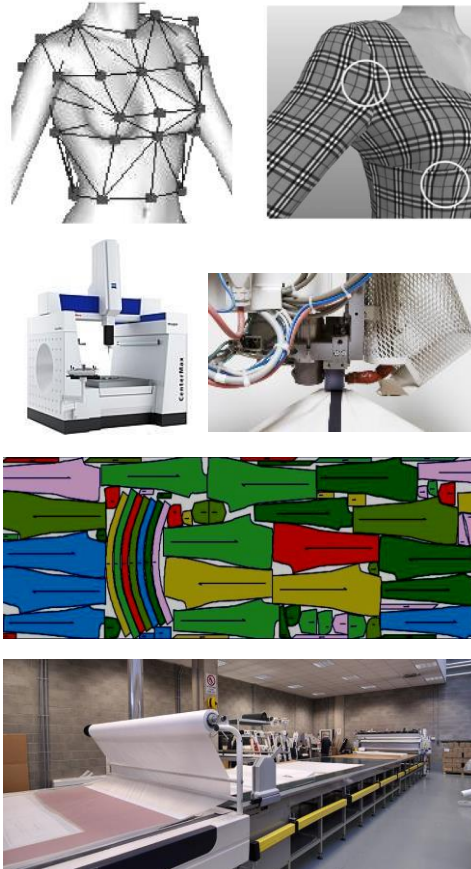
# Pattern is fully integrated with Italy's Best Suppliers and *Façonists*

## Suppliers


### Selection of suppliers




## Pattern / Project Engineering



## Façonist / Contract Manufacturer

 Pre-production samples are prepared internally to allow clients to pre-verify



 The majority of production is carried out externally by *façonists*



 High fragmentation of minor suppliers

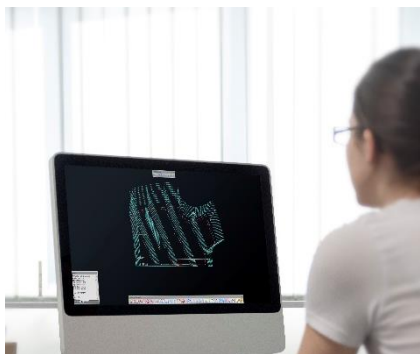
 Full control over the value chain by dictating own standards

Established partnerships with suppliers of certified raw materials, mainly located in Italy

Full control over the value chain through established long-term partnership with the key players of a highly polarized industry

# Pattern's Key Business Values

## Technology and R&D



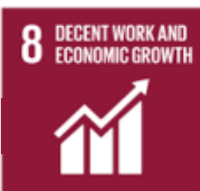
*Unique laborations*

## Human Resources



*Quality assurance*

## Sustainability



*Circular economy*

# Technology and R&D



## Technology

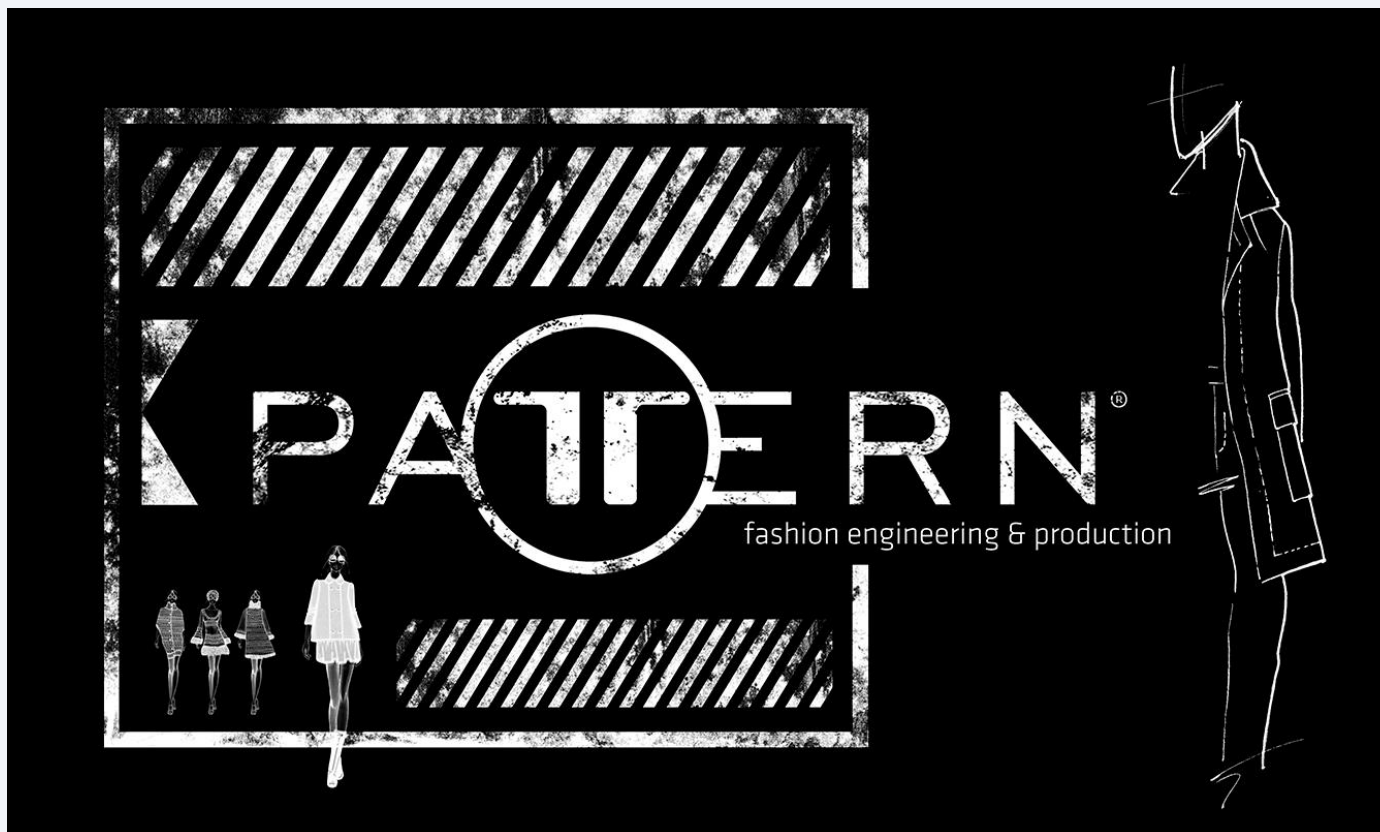
- 🔊 For **prototyping**, Pattern has been investing for the last 8 years in the **latest CAD technologies**
- 🔊 **Introduction of a more advanced plotting machine, up to date with the latest machinery (heat-sealing, ultrasound)**
- 🔊 3D CAD, advanced PDM and breakthrough production technologies allow for flexibility and superior response to clients



## Innovation

- 🔊 Experimentation on new fabric technologies and a recognized signature of eco-sustainability
- 🔊 The ESEMPLARE brand is a:
  - 🔊 R&D tool for the experimentation of new fabrics and the use of the newest technologies
  - 🔊 Marketing tool to show Pattern capabilities
- 🔊 Continuous experimentation and process improvement to stay always ahead of market trends





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