



McPherson's Limited Investor Presentation

April 2016



MCP Financial Update (CFO, Paul Witheridge)

⌘ Divestment of remaining 49% of Housewares joint venture has completed

- ❄ \$21.3m in funds generated, inclusive of \$2.2m in repaid working capital loans
- ❄ \$2.0m profit before tax generated on total divestment
- ❄ \$10.0m applied to buyback bonds
- ❄ Balance of funds applied to reduce working capital debt
- ❄ Material reduction in debt and strengthening of balance sheet

⌘ As per 1H 2016 Results Release, improved second half F2016 performance relative to F2015 is expected despite the significant adverse impact of AUD/USD depreciation



Strategy Update

Paul Maguire

Managing Director



Trading commentary

- ⌘ Retail trading conditions favourable with brands performing well
- ⌘ Commercial building approvals trending upwards
- ⌘ Margins adversely impacted by the weak AUD
- ⌘ Easing commodity prices partially offsetting the weak AUD
- ⌘ Price increases and other performance improvement initiatives helping offset the impact of currency
- ⌘ Note - 2H2015 was adversely impacted by the requirement to supply unprofitable private label products. These contracts were exited June 2015, therefore 2H2016 will benefit from their absence



Corporate Brand Identity

Mission

To be a world-class consumer products company
through
1st choice products for consumers
and by being a
1st choice partner for customers and suppliers
1st choice employer for employees
1st choice investment for shareholders

Vision

Making life easier

for

Consumers: through high quality value for money branded products that improve their lives

Customers: by providing retail solutions through McPherson's products and services

Suppliers: through McPherson's growth

Employees: careers, rewards and recognition

Shareholders: through earnings growth

Vision

Making
life easier

Proposition

Providing innovative, high quality
branded products and services that
improve the lives of consumers

Proof Points

Tangible: revenue, profit and market share growth; market
leading brands; diversity of product, categories, customers
and channels

Intangible: trusted heritage brands; reputation; strong
relationships; longevity; passion and commitment

Benefits

Consumers: high quality, value for money branded products that help consumers to look
and feel their best everyday

Customers: profit, consistent supply, category management, innovation & strong brands

Suppliers: distribution through multiple brands, categories customers and channels

Employees: careers at a quality workplace with people who respect & support each other

Shareholders: return on investment, earnings growth, consistent dividends

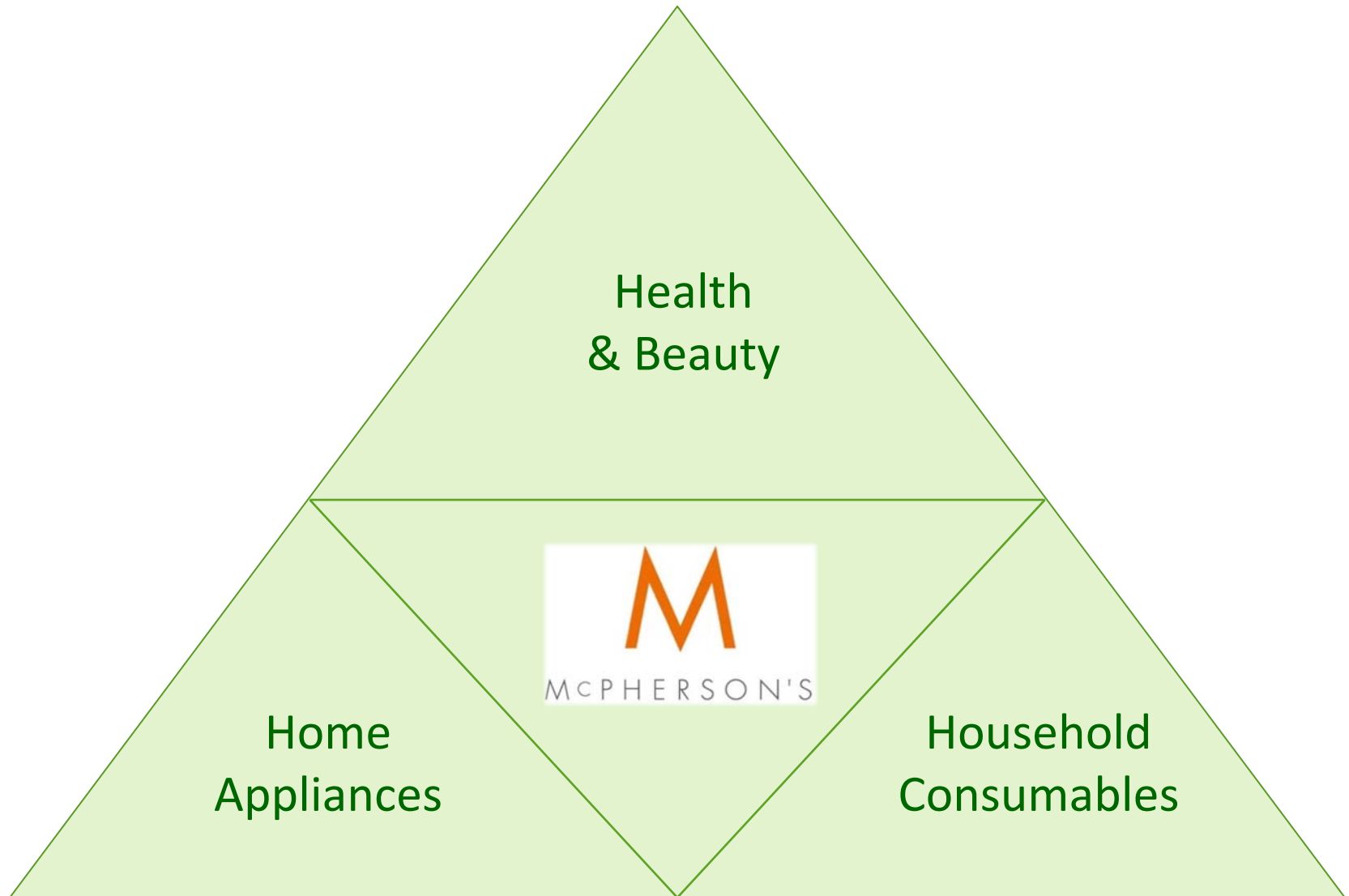
Culture

Accountable. Aspirational. Proactive. Innovative. Communicative. Helpful. Passionate.






Values

Respect. Integrity. Quality. Openness. Customer & Consumer Centric. Success.

Company divisions



Divisional revenue summary (Aus & NZ)*

		SHARE OF REVENUE 1H2016	REVENUE GROWTH 1H16 vs 1H15	REASONS	OUTLOOK
HEALTH & BEAUTY	 [A'kin] 	48%	11%	New products and new ranging	Growth in revenue and profit
HOME APPLIANCES	 	23%	18%	New products and new ranging	Growth in revenue and profit
HOUSEHOLD CONSUMABLES	 <small>Inspiring Professional Results</small>	25%	(10%)	Multix sales up 1%, market leadership maintained, some private label exited	Consistent performance
IMPULSE MERCHANDISING (IMD) / OTHER		4%	(7%)	IMD grew but pet products exited	Planned exit

* Revenue summary excludes Housewares due to the divestment of 51% of Housewares, which has been 'equity accounted' since Nov 2014



Company transformation

McPherson's is substantially **transforming** through acquisition & divestment and the establishment of new agency partnerships; increasing participation in more profitable categories, channels and markets

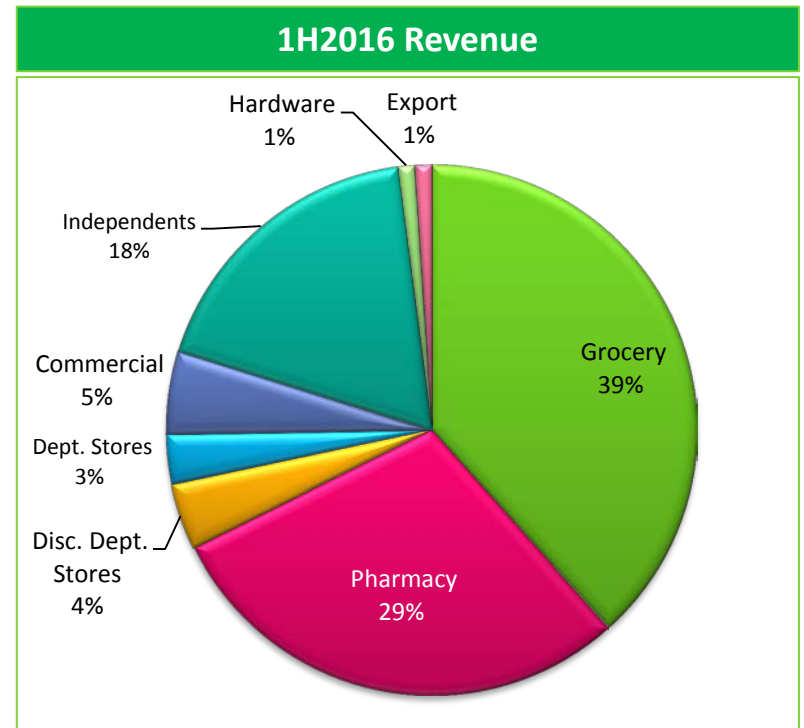
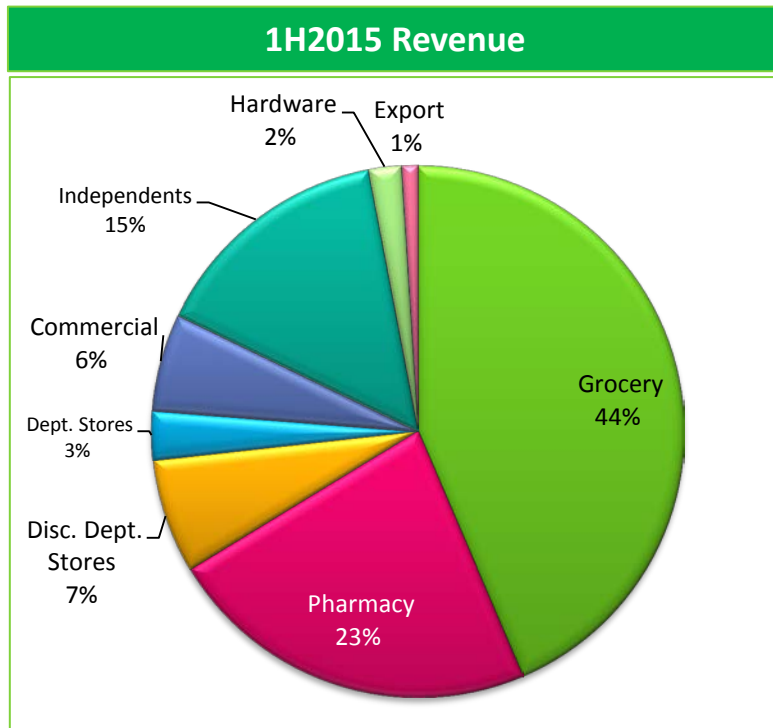
McPherson's is a **consumer centric** organisation committed to providing consumers with **innovative, high quality** branded products that **improve** their lives

Our **transformation** is designed to ensure that we can **continue to deliver** on this **promise** and in doing so **create value** for shareholders



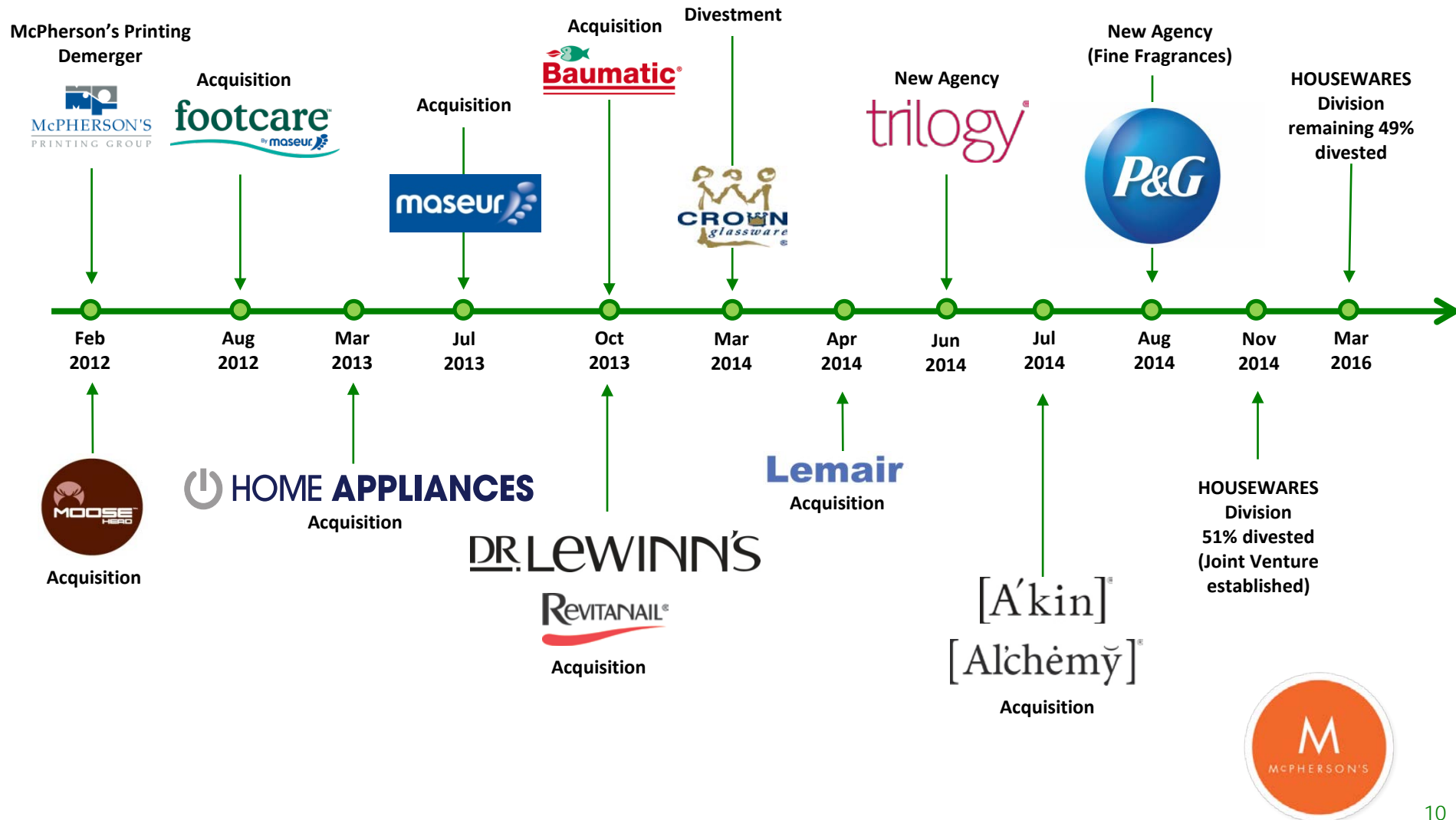
Transformation benefits

- ⌘ Lessened exposure to foreign exchange
- ⌘ A more profitable channel and customer mix



Company transformation timeline

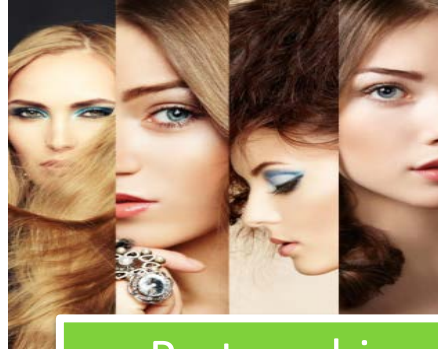
Diversification achieved through acquisitions, divestments and new agencies



Transformation progress



Acquisitions



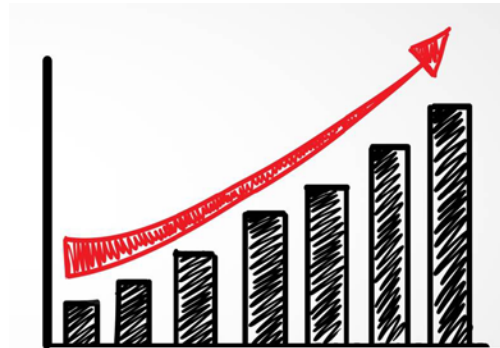
Partnerships



Divestment



New Products



Performance Improvement



Home Appliances

- ⌘ 'Home Appliances' business acquired, inclusive of the Euromaid and Baumatic brands
 - ❄ providing growth via diversification into electrical retail, hardware and commercial building





Beauty brands

- ⌘ Dr LeWinn's skincare
- ⌘ A'kin natural skincare & haircare
 - ❄ Leveraging McPherson's strengths
 - ❄ Expansion in Pharmacy channel
 - ❄ Significant growth potential



[A'kin][®] DR. LEWINN'S

Beauty Agency

⌘ Partnership with Trilogy natural skincare



Partnership

trilogy®



Beauty Agency

⌘ Partnership with Procter & Gamble Fine Fragrances



Partnership



GUCCI



Procter&Gamble



BOSS
HUGO BOSS



D&G
DOLCE & GABBANA



New Products

⌘ Pipeline of innovative new products across all divisions



Innovation

MULTI AWARD WINNING NAIL STRENGTHENER



Performance improvement continuing >\$10 million in annualised benefit from:



Performance Improvement

Price Increases



Organisational Redesign



Product Cost Savings



IT System



In progress...

...brand consolidation, product rationalisation and digital transformation

Digital transformation ongoing

- ⌘ Digital transformation is technology enabling innovation, creativity, and growth
- ⌘ Driven by our strategic objectives and consumer expectations
- ⌘ Helps build meaningful relationships with consumers based on their actions
- ⌘ Leverages McPherson's capabilities
- ⌘ McPherson's selected e-commerce platform is:



Digital transformation impacts McPherson's across:



Platforms / Technology



Syndication



Marketing



Big Data



Customer & Consumer Relationships



Product

Outlook



Health and Beauty division

Current Status

- ⌘ Revenue 1H 2016 11% ahead of prior year
- ⌘ Successful new products under trusted brands
- ⌘ Acquisitions and new agencies boosting McPherson's presence in Pharmacy and Department Stores and reaffirming McPherson's beauty industry credentials



Outlook

- ⌘ Brand consolidation
- ⌘ Range harmonisation
- ⌘ Profitability boosted by price increases, structural reforms and operational initiatives
- ⌘ Focus on advanced beauty and natural beauty
- ⌘ Enhanced digital capability
- ⌘ Continued growth through:
 - ⌘ new product development
 - ⌘ the potential to utilise available DC capacity for additional product lines
 - ⌘ international expansion

DR. LEWINN'S®



Lady Jayne



Household Consumables division

Current Status

- ⌘ Multix branded revenue up 1% 1H 2016 and market leadership maintained
- ⌘ Profit impacted by:
 - ✱ Unfavourable effect of weak AUD
 - ✱ Delayed acceptance of price increases
 - ✱ Increased 'promotional support' required
 - ✱ Favourable lower commodity prices

Outlook

- ⌘ Multix market leadership maintained
- ⌘ Reduced private label involvement
- ⌘ Favourable impact of price increases, new products, sourcing initiatives and easing commodity prices but downside currency risk
- ⌘ Expansion in New Zealand



Outlook summary remains as per Half Year



- ⌘ Price increases, operational initiatives and reduced operational expenditure will improve profit in FY2016; however, currency downside risk remains longer term
- ⌘ Health & Beauty and Home Appliances to benefit from new products and continued growth
- ⌘ Multix to maintain market leadership but profitability dependent upon currency and commodity pricing mix
- ⌘ Housewares divestment strengthens the balance sheet
- ⌘ Company transformation to continue through further price increases, innovative new products, brand consolidation and expense reductions
- ⌘ Emphasis on Health & Beauty expansion through boosted digital capability and market development



Home Appliances

Steve Rorie

Chief Executive Officer

April 2016



Home Appliances division

Euromaid

Current Status

- ⌘ Excellent customer and supplier network
- ⌘ New products launched 2H2015 & 1H2016
- ⌘ Commercial building approvals up
- ⌘ Revenue up 18% in 1H 2016 but margins adversely affected by weak AUD
- ⌘ Uncertainty around Masters



Home Appliances –

Gross Sales Approximately \$90 million

Key brands:

- Euromaid
- Baumatic
- ARC

Key Points:

- Channel Management Strategy
- Product Range
- Product displays
- Sales representation
- After sales service

Retail 70%

Key brands:

- Euromaid
- Baumatic

Key points:

- Product Range
- Merchant relationships
- Builder relationships
- After sales service

Commercial 25%

Key brands:

- IAG
- Baumatic - Studio Solari

Key points:

- Product range
- Merchant Relationships
- Product displays
- Customer service
- After Sales Service

Kitchen 5%

Home Appliances – Key initiatives

Implemented:

- ⌘ Organisational re-design
- ⌘ Core ranging of new lines
- ⌘ New products launched
- ⌘ Visual merchandising updated
- ⌘ Supplier consolidation



Core ranging – 54cm Wide Ovens

Home Appliances – Key initiatives

Implemented:

- ⌘ Range rationalisation
- ⌘ Supply chain review
- ⌘ Internal sales - Service Centre efficiencies
- ⌘ Aftersales – Service Centre efficiencies
- ⌘ Business margins re-set for lower currency environment



Core ranging – Rangehoods

Home Appliances - Outlook

⌘ Continued growth from recent new ranges:

❄ new products launched 2H 2015 & 1H 2016

⌘ Uncertainty around Masters

⌘ Strong building approvals benefiting commercial

⌘ Kitchen channel sales bolstered

⌘ Supply chain savings

⌘ Savings from Service Centre efficiencies

⌘ Margin restoration through:

❄ Price increases – effective 1 June 2016

❄ Supplier consolidation delivering lower costs

Euromaid

Baumatic®

ARC
appliances

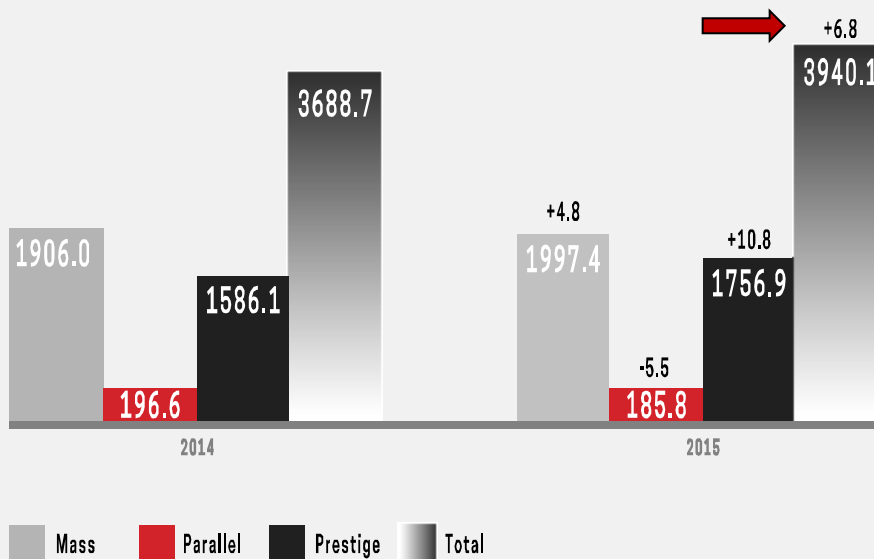
Donna Chan
Marketing Director
April 2016



MARKET GROWTH

BEAUTY CATEGORY MARKET VALUE

\$ Retail (M)



Source: Beauty Update Market Report 2015

Key growth drivers:

- Drop in AUD kept shoppers at home.
- Prestige segment +10.8%.
- High volume of purchasing from Chinese consumers.
- Internet (+18%) and Specialist (+16%) represented the fastest growing channels.

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PHARMACY CHANNEL

PHARMACY	MAT 03/01/2016	
	Dollars (\$M)	Dollars Growth % YA
Total Beauty Department	\$ 2,388	11.5
<i>Total Baby Care</i>	\$ 264	37.1
<i>Total Beauty Accessories</i>	\$ 108	7.3
Total Beauty Accessories Cosmetic Tools	\$ 52	20.0
<i>Total Fragrances</i>	\$ 441	3.2
<i>Total Hair Care</i>	\$ 286	5.0
Total Hair Care Shampoo & Conditioner	\$ 103	9.6
Total Hair Care Styling	\$ 42	9.2
Total Hair Care Hair Accessories	\$ 33	2.7
<i>Total Make-up Prestige</i>	\$ 21	10.0
<i>Total Make-up Self Select</i>	\$ 388	7.6
<i>Total Personal Care</i>	\$ 214	8.7
<i>Total Skincare Prestige</i>	\$ 19	-11.4
<i>Total Skincare Self Select</i>	\$ 547	18.0
Total Skincare Self Select Facial Self Select	\$ 299	17.3
Total Skincare Self Select Hand & Body Self Select	\$ 200	18.0
<i>Total Suncare</i>	\$ 100	15.8

69% of MCP H&B sales within Pharmacy Channel

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MCP leads the category with 43% market share

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Alchemy leads
Natural S&C with
34% market share
within Priceline

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Total Suncare	\$ 100	15.8

MCP leads the category with 46% market share



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Fast growing categories:

- **Natural +31%**
- **Cosmeceutical +29%**

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MCP H&B GROWTH PLAN

Fewer, Bigger Brands

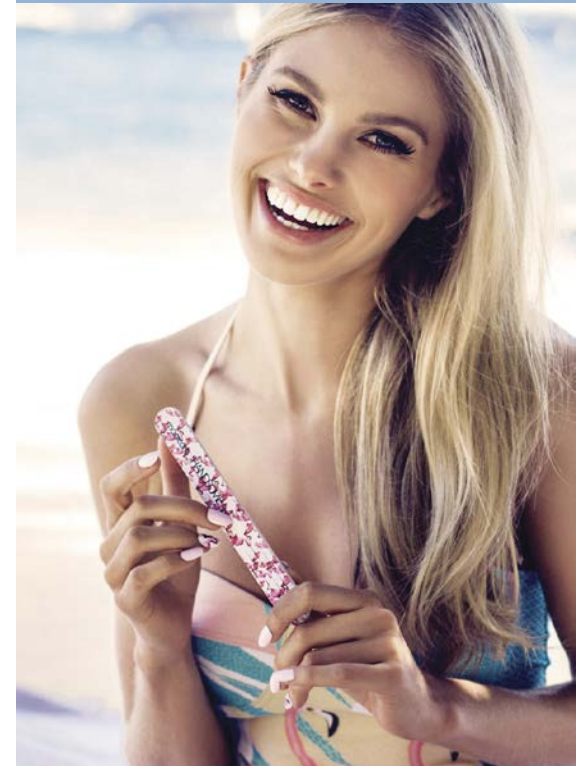
ADVANCED BEAUTY






NATURAL BEAUTY



ESSENTIAL BEAUTY



MCP STRATEGIC PRIORITIES

CATEGORY	KEY BRANDS	STRATEGIC INTENT	VISION
ADVANCED BEAUTY		High Growth	To be the renowned leader in Anti-Ageing
NATURAL BEAUTY		High Growth	To be the market leader in Natural Beauty
ESSENTIAL BEAUTY		Selective Growth	To be the leading player in Essential Beauty
HEALTH & BEAUTY		Margin Enhancement	Retail price and cost optimisation
HEALTH & BEAUTY		Digital transformation	Omni-channel consumer centric strategy



ADVANCED BEAUTY

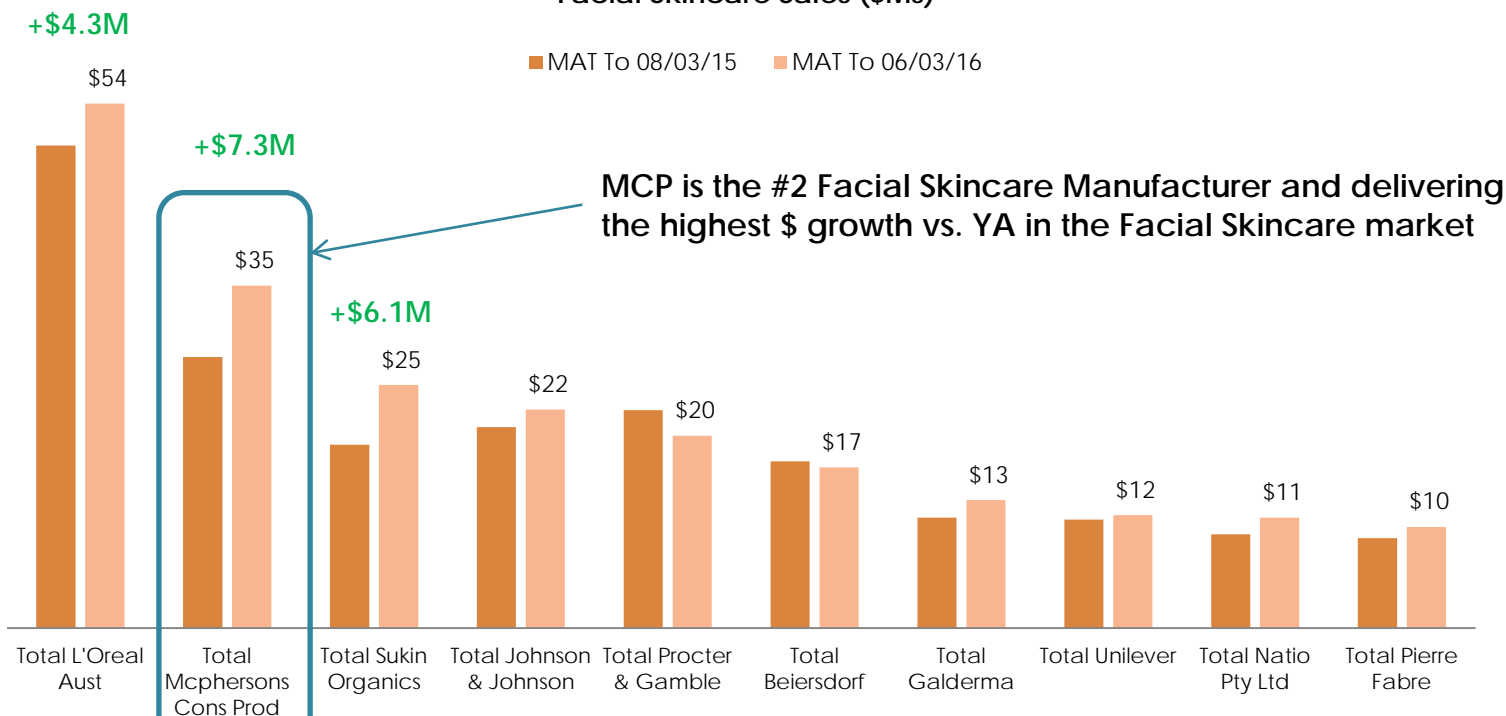


PHARMACY FACIAL SKINCARE: MCP #2

Top 10 Facial Skincare Manufacturers MAT \$ Value, Share and Growth

AU Pharmacy Facial Skincare Sales (\$Ms)

■ MAT To 08/03/15 ■ MAT To 06/03/16



MCP is the #2 Facial Skincare Manufacturer and delivering the highest \$ growth vs. YA in the Facial Skincare market

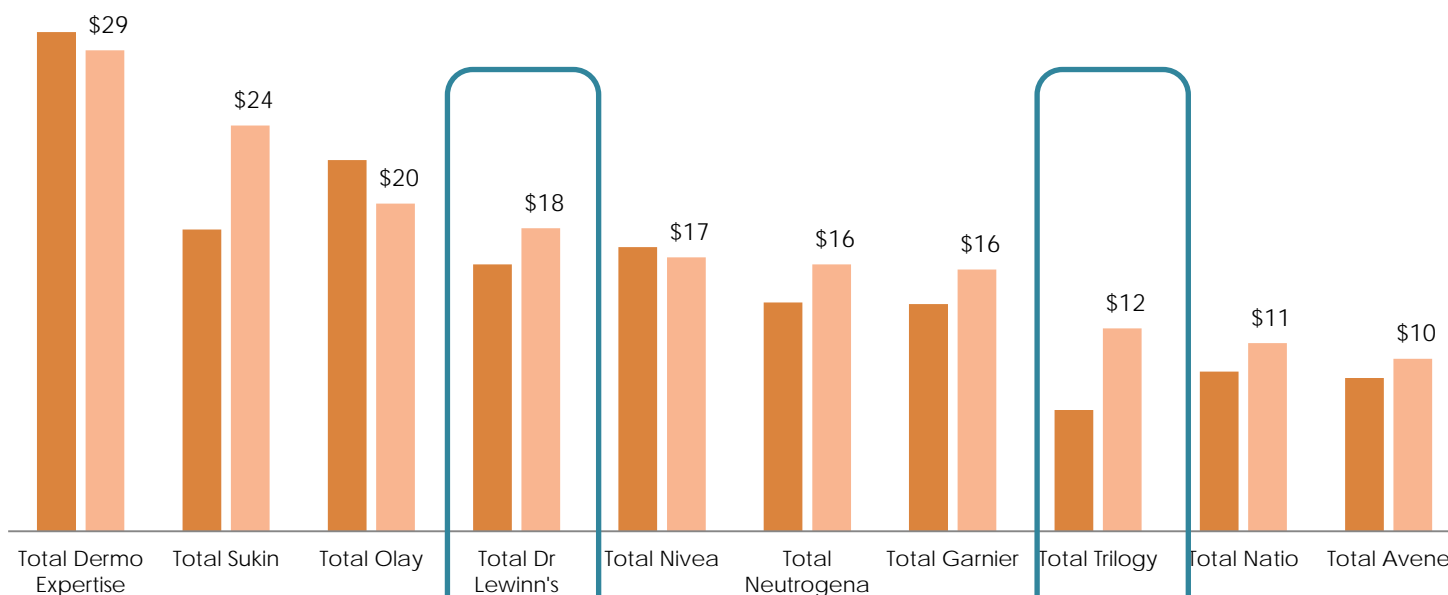
\$ Growth % vs YA	8.7	26.4	32.5	8.8	-11.8	-3.6	15.9	4.0	17.7	12.7
\$ Share of Facial Skincare	15.4	10.1	7.2	6.4	5.7	4.7	3.8	3.3	3.2	3.0

Dr LeWinn's RANKED #4

Top 10 Facial Skincare Brands MAT \$ Value, Share and Growth

AU Pharmacy
Facial Skincare Sales (\$Ms)

■ MAT To 08/03/15 ■ MAT To 06/03/16



\$ Growth % vs YA	-3.7	34.5	-11.8	13.6	-3.6	16.7	15.1	67.3	17.7	12.7
\$ Share of Facial Skincare	8.3	7.0	5.7	5.2	4.7	4.6	4.5	3.5	3.2	3.0

VISION – Dr LeWinn's

To be the renowned leader in
Anti-Ageing.

- Engage consumers at every touch-point
- Increase trial & penetration
- Grow through leading edge innovation

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NEW BRAND COMMUNICATIONS

Ownable Brand Idea based on strong foundations and insights

DR. LEWINN'S®

#1 COSMECEUTICAL
SKINCARE BRAND

CELEBRATING
25
YEARS



Tammy

From: Perth WA
Age: 25 to 34
Gender: Female
Eye Colour: Hazel
Hair Colour: Blonde
Skin Tone: Light
Skin Type: Combination

Dr. LeWinn's Eternal Youth

This is lightweight formula
plump, skin has visibly be
There's not been a change
light floral scent which is
and won't shadow into a t
pay as you get a day and



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LEADING EDGE NEW PRODUCTS

Insight led innovation

Highly experienced R&D team

Intriguing ingredient stories



Known ingredients



Visible Results

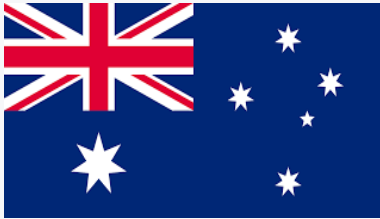


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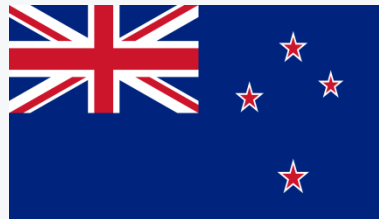
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MARKET EXPANSION



AUSTRALIA
PRIORITY GROWTH
MARKET



NEW ZEALAND
Growth Plan



SINGAPORE
Growth Plan



KOREA
Licensing Agreement



UK
Venture to secure
DLW trademark



CHINA
Developing e-commerce
go to market plan

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By end 2017, Dr LeWinn's will have....

- Transformed into a brand with a strong positioning and purpose
- Acquired the attention & hearts of skin care users
- Improved margins to fuel investment in top-line growth
- Own an exciting, viable platform to expand into new categories, new distribution channels and internationally



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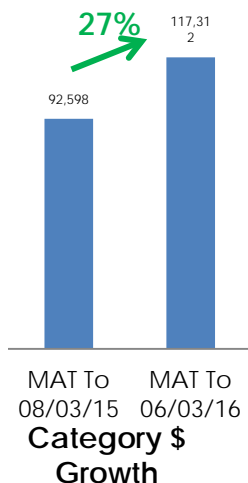


NATURAL BEAUTY

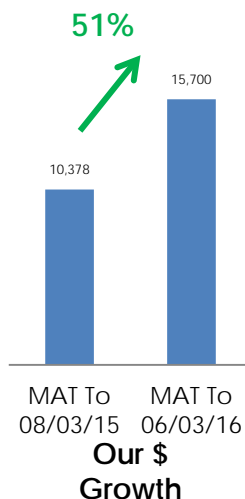


HIGH GROWTH CATEGORY

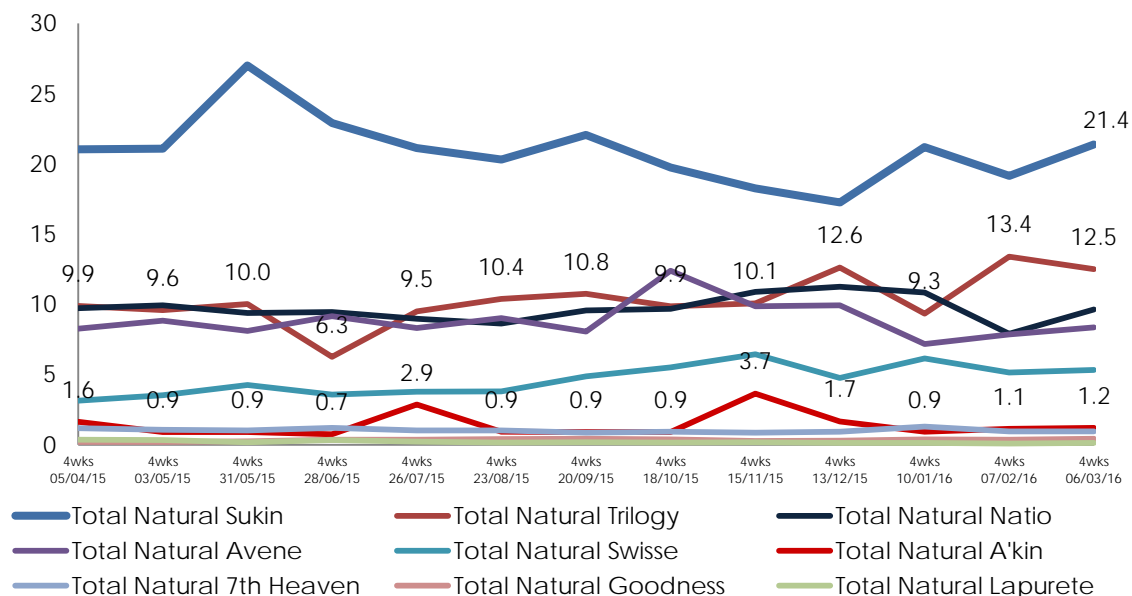
AU Pharmacy
Natural Skincare
Sales \$000s



AU Pharmacy
MCP Natural
Skincare Sales
\$000s



Natural Skincare Scorecard



	MAT To 06/03/16				Quarter To 06/03/16			
Australia Pharmacy	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA
Total Natural	117,312	26.7	100.0	0.0	31,036	18.2	100.0	0.0
Total Natural Sukin	24,483	34.5	20.9	1.2	6,315	21.0	20.3	0.5
Total Natural Trilogi	12,232	67.3	10.4	2.5	3,735	56.4	12.0	2.9
Total Natural Natio	11,342	17.7	9.7	-0.7	2,958	12.2	9.5	-0.5
Total Natural Swisse	5,486	119.0	4.7	2.0	1,681	133.7	5.4	2.7
Total Natural Jurlique	3,514	23.3	3.0	-0.1	829	10.1	2.7	-0.2
Total Natural Antipodes	1,626	32.0	2.0	-0.0	625	96.2	2.8	0.9
Total Natural Rosehip By Essano	1,923	73.5	1.6	0.4	688	56.5	2.2	0.5
Total Natural A'kin	1,658	32.3	1.4	0.1	324	-5.2	1.0	-0.3
Total Natural Goodness	389	7305.8	0.3	0.3	116	2104.7	0.4	0.4

BRAND HERITAGE

- 1987: One man's vision to pioneer advances in natural chemistry to create **pure and natural** products free of chemicals, containing **more than a drop** of concentrated goodness to deliver effective results.
- 1994: **Al'chemy** haircare was launched.
- 2002: **A'kin** natural skincare was launched to complement Al'chemy.
- 2014: McPherson's acquired the brand.



NO PARABENS
NO SULPHATES



NO NASTIES



CRUELTY
FREE



100% VEGAN



AUSTRALIAN
MADE & OWNED

VISION – A'kin

To be recognised as a leading natural skincare & haircare brand.

- Extend appeal and reach to a wider group of consumers
- Transform with a relevant and distinctive brand proposition
- Increase awareness and trial
- Build a global brand (AU, NZ and Asia)

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A'KIN BRAND TRANSFORMATION

Natural Heritage + Pure, Fresh, Efficacious + New Pack Design +

Loved by Consumers

ONE BRAND

[A'kin][®]



A'kin

OVERALL STAR RATING



5/5 stars from

[FOLLOW THIS PRODUCT](#)

A'kin Jojoba & Corn Gentle Exfolia
refines skin texture by using jojoba


NO PARABENS
NO SULPHATES



"This product just about
changed my life!"

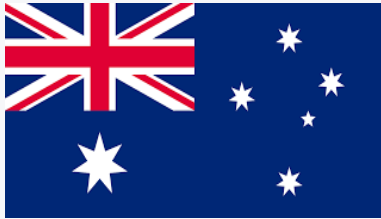
BEAUTYHEAVEN MEMBER

"My skin has never been
so soft and supple."

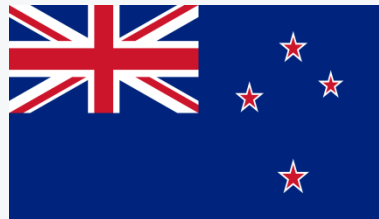
BEAUTYHEAVEN MEMBER

EMPOWERING YOU TO LOOK & FEEL YOUR BEST

MARKET EXPANSION



AUSTRALIA
PRIORITY GROWTH
MARKET



NEW ZEALAND
Growth Plan



CHINA
Developing e-commerce
go to market plan



SINGAPORE
Growth Plan

EMPOWERING YOU TO LOOK & FEEL YOUR BEST





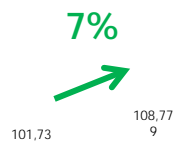
ESSENTIAL BEAUTY



CLEAR MARKET LEADER

Beauty Accessories Scorecard

AU Pharmacy
Beauty Sales
\$000s



MAT To 22/03/15
MAT To 20/03/16
Category
\$ Growth

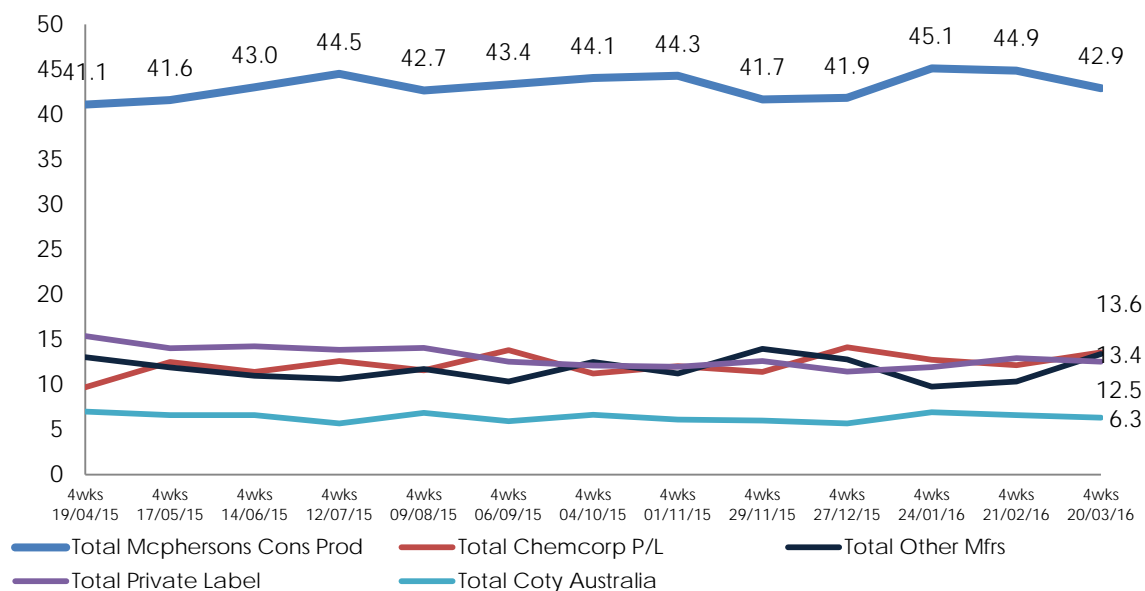
AU Pharmacy
MCP Beauty
Sales \$000s

11%



MAT To 22/03/15
MAT To 20/03/16
MCP
\$ Growth

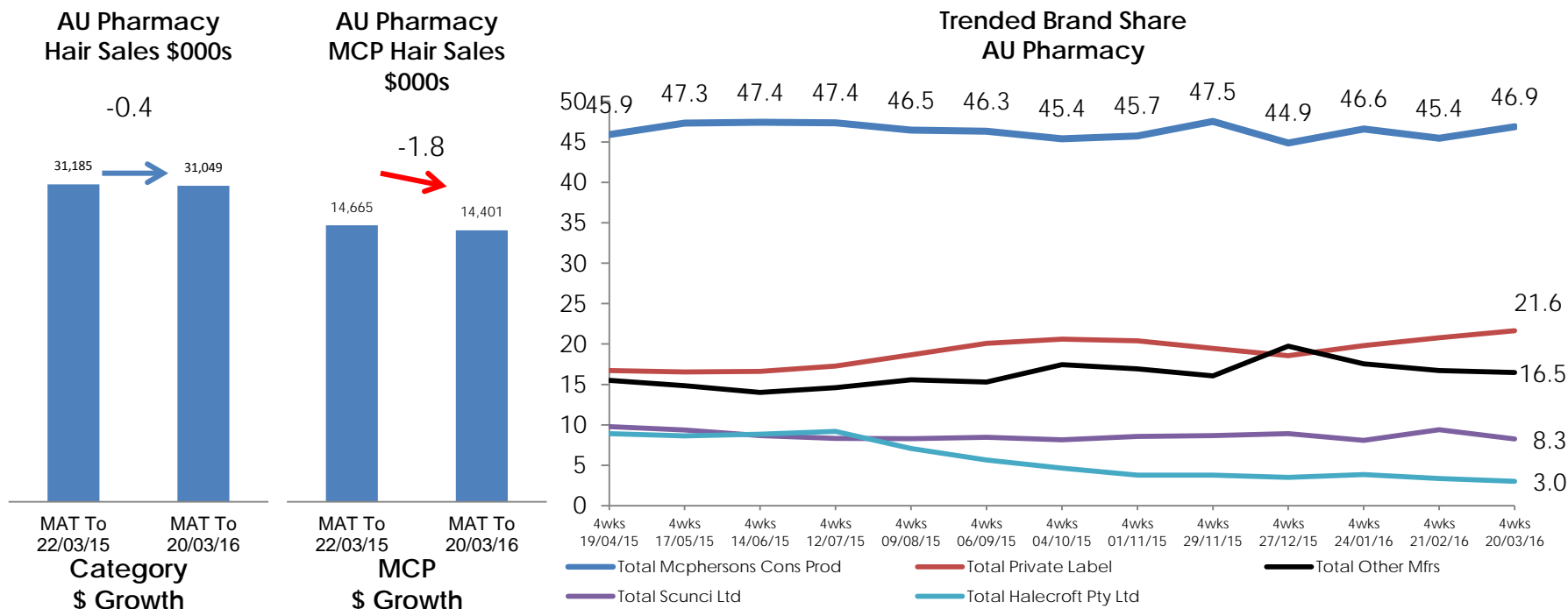
Trended Brand Share
AU Pharmacy



	MAT To 20/03/16				Quarter To 20/03/16			
Australia Pharmacy	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA
Total Beauty Accessories	108,779	6.9	100.0	0.0	27,813	6.0	100.0	0.0
Total Mcphersons Cons Prod	46,939	11.1	43.2	1.6	12,203	11.3	43.9	2.1
Total Private Label	14,093	6.6	13.0	-0.0	3,441	-6.8	12.4	-1.7
Total Chemcorp P/L	13,345	34.4	12.3	2.5	3,687	40.0	13.3	3.2
Total Other Mfrs	12,829	1.4	11.8	-0.6	3,124	-2.2	11.2	-0.9
Total Coty Australia	6,907	-12.7	6.4	-1.4	1,814	-11.8	6.5	-1.3

CLEAR MARKET LEADER

Hair Accessories Scorecard



	MAT To 20/03/16				Quarter To 20/03/16			
	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA
Australia Pharmacy								
Total Hair Accessories	31,049	-0.4	100.0	0.0	7,713	-3.8	100.0	0.0
Total Mcphersons Cons Prod	14,401	-1.8	46.4	-0.6	3,556	-1.4	46.1	1.2
Total Private Label	5,913	25.6	19.0	3.9	1,580	9.3	20.5	2.5
Total Other Mfrs	5,053	5.0	16.3	0.8	1,333	6.3	17.3	1.7
Total Scunci Ltd	2,698	-10.6	8.7	-1.0	662	-12.5	8.6	-0.8
Total Halecroft Pty Ltd	1,751	-41.0	5.6	-3.9	267	-63.1	3.5	-5.6

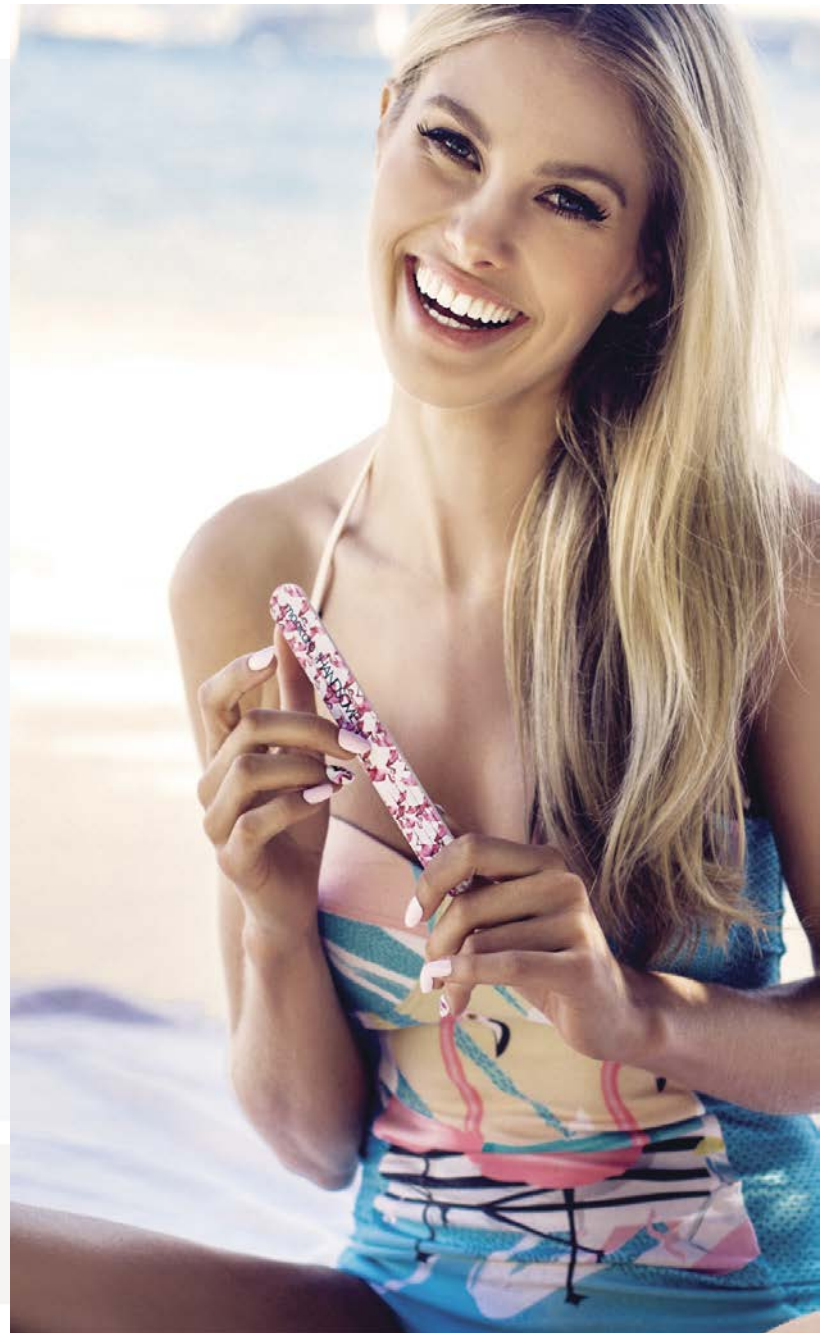
VISION

Essential Beauty

To be the leading player in the Essential Beauty market.

- Attract younger consumers to Manicare and Lady Jayne through innovation and re-invention
- Increase brand relevance and conversion to purchase
- Drive advocacy and endorsement across multiple touch points

EMPOWERING YOU TO LOOK & FEEL YOUR BEST



FASHION COLLABORATION

- New news on top selling core beauty and hair accessories
- Attract the attention of younger consumers



tropical inspired BEAUTY ESSENTIALS

Sydney swimwear label, We Are Handsome, have teamed up with Manicare® & Glam By Manicare™ to create a limited edition collection of exotic-fusion beauty tools and accessories. So prep in style this Summer with your newest, purse-worthy beauty essentials.



CONSUMER ADVOCACY

- Awards voted by consumers leveraged on -pack, on-line and in-store
- Reviews and ratings
- Digital marketing campaigns featuring blogger amplification



— LASHES **VS** NO LASHES —
EXPERIMENT
TWO GIRLS. HIDDEN CAMERAS. ONE NIGHT OUT

Without Lashes
With Lashes

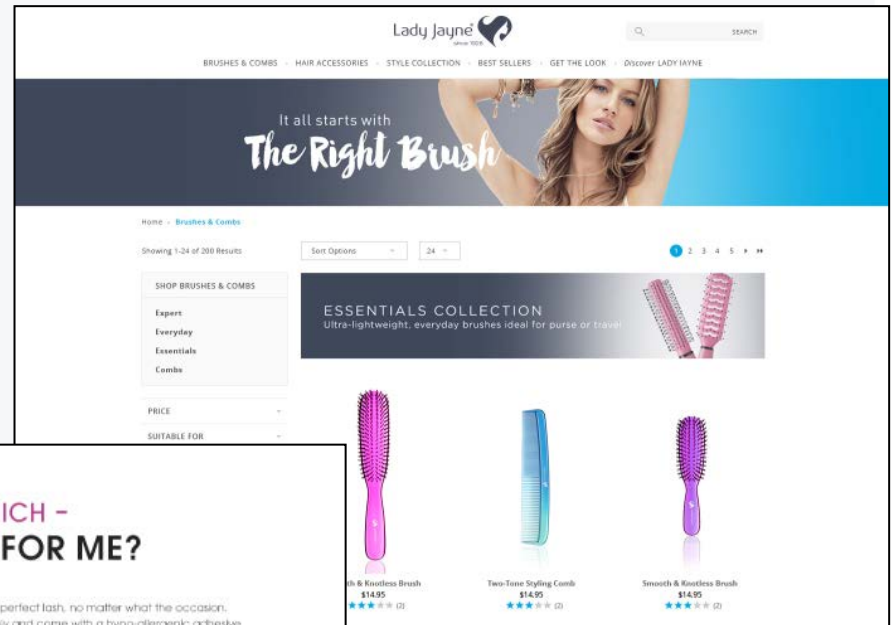
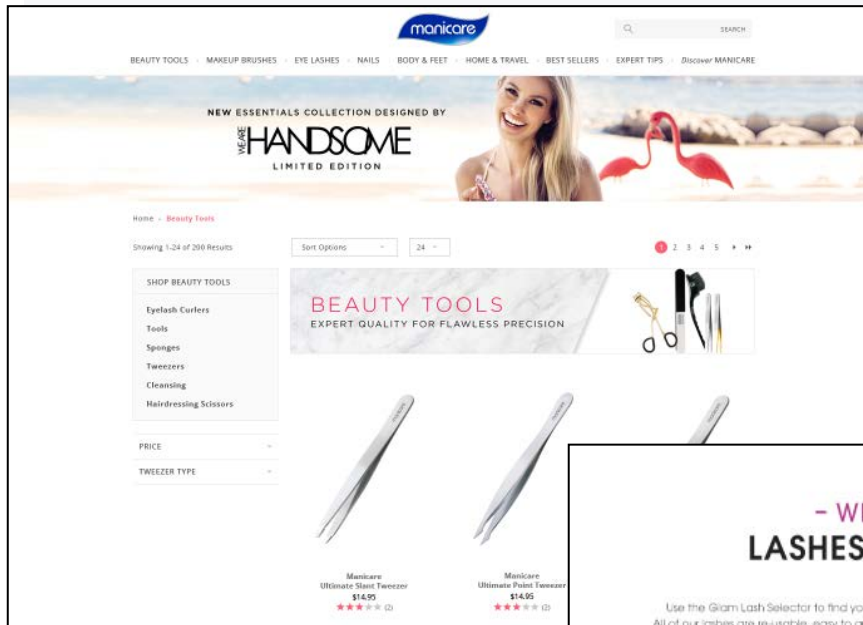
42%
MORE LOVE[®]
wearing GLAM LASHES

WATCH THE EXPERIMENT NOW
getyourglam.com.au

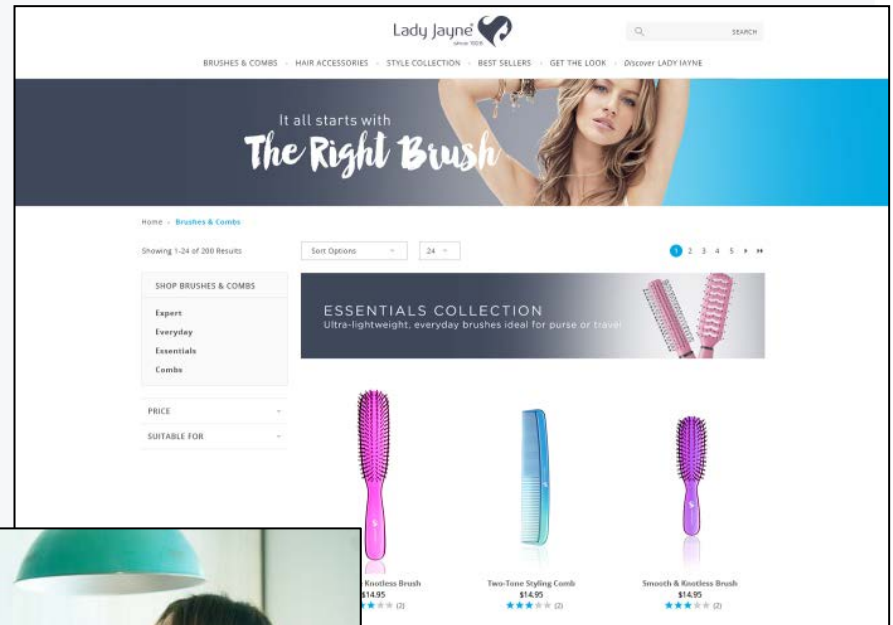
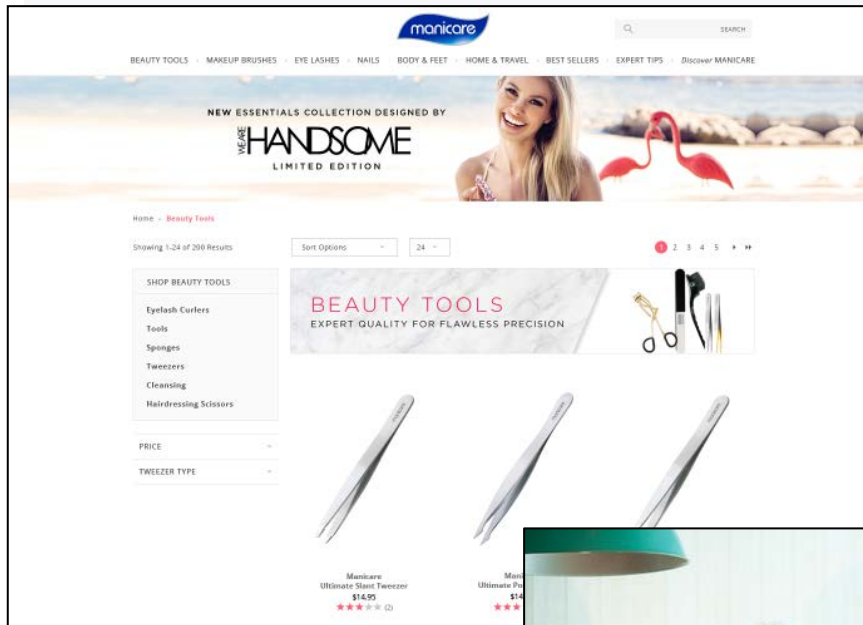
GET YOUR **glam** ON
with more

An advertisement for the 'Glam Lashes Experiment'. It features two women, one without lashes and one with, both smiling. A large red heart graphic contains the text '42% MORE LOVE wearing GLAM LASHES'. Below the women are three boxes of Glam eyelashes: 'NATURAL', 'DRAMATIC', and 'VOLUME'. The bottom of the ad includes the text 'WATCH THE EXPERIMENT NOW' and the website 'getyourglam.com.au', along with the slogan 'GET YOUR glam ON with more'.

CHANNEL EXPANSION



CHANNEL EXPANSION



MCP H&B GROWTH PLAN

Fewer, Bigger Brands

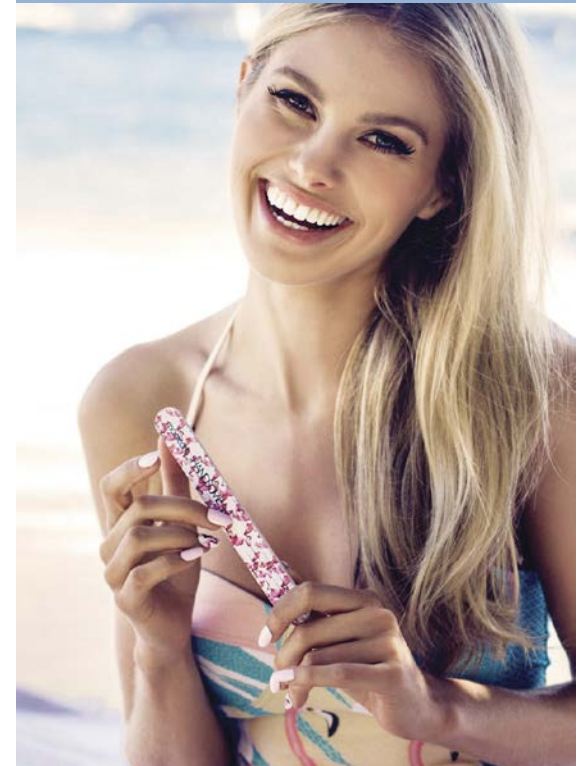
ADVANCED BEAUTY



NATURAL BEAUTY



ESSENTIAL BEAUTY



McPherson's Limited



M
McPHERSON'S