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DIXY Group

Investors & Analysts Presentation

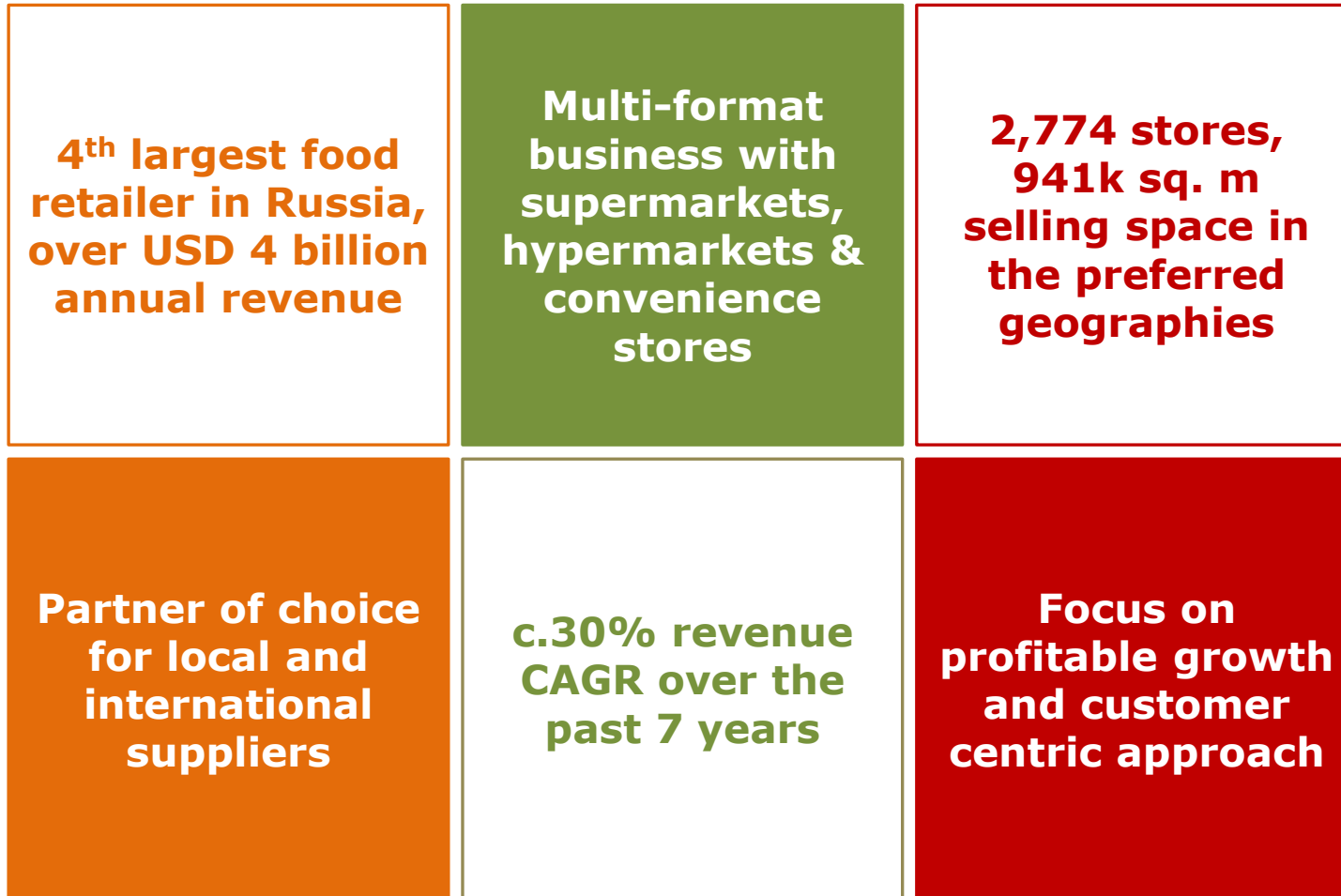
October 2016.



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Why DIXY?



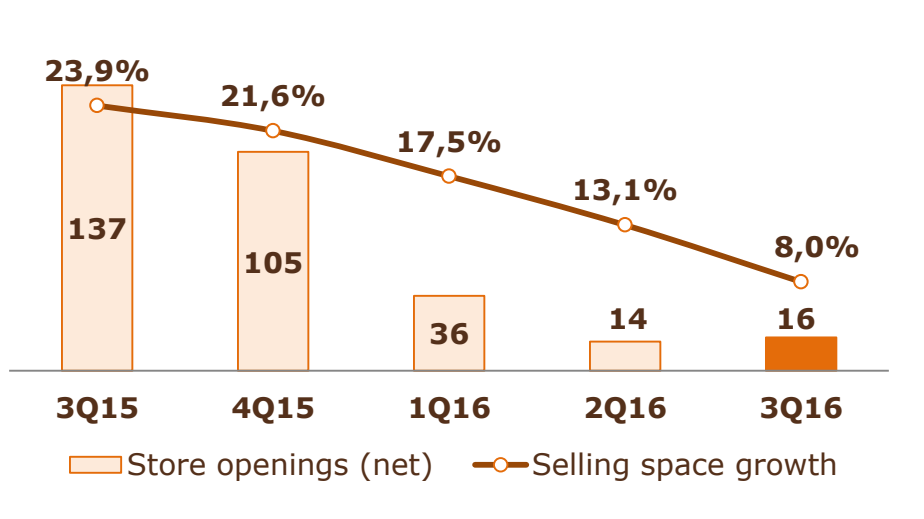
DIXY Group Performance Q3 & 9m 2016

DIXY Group Trading Update Highlights

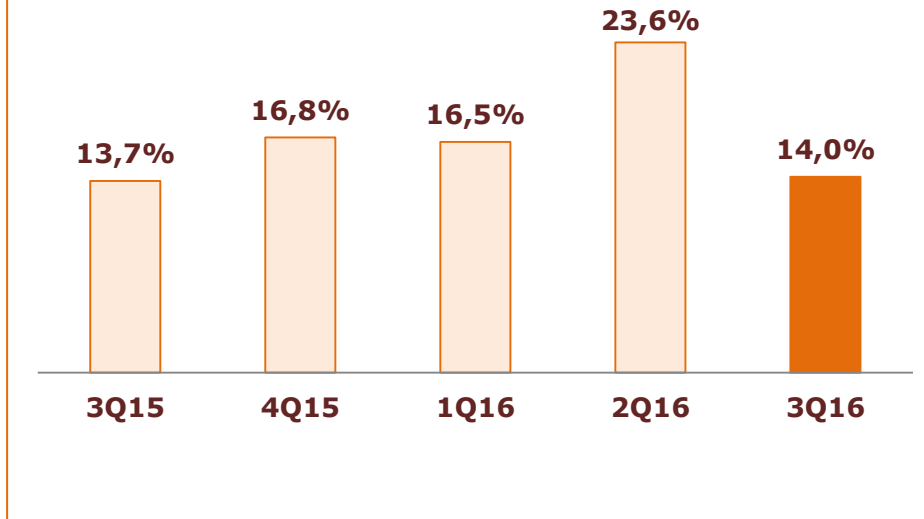
- Q3 2016 sales: 75 billion RUB, 14% growth y-o-y.
- Q3 2016 LFL: 4.2% growth (traffic +1.0%; average ticket +3.1%).
- 9m 2016 sales: 233 billion RUB, 18% growth y-o-y; selling space added 8%.
- 9m 2016 LFL: 6.5% growth (traffic +2.9%; average ticket +3.5%).
- 111 new stores opened while 45 closed, 66 net openings in 9m 2016.

DIXY Group Performance Q3 2016

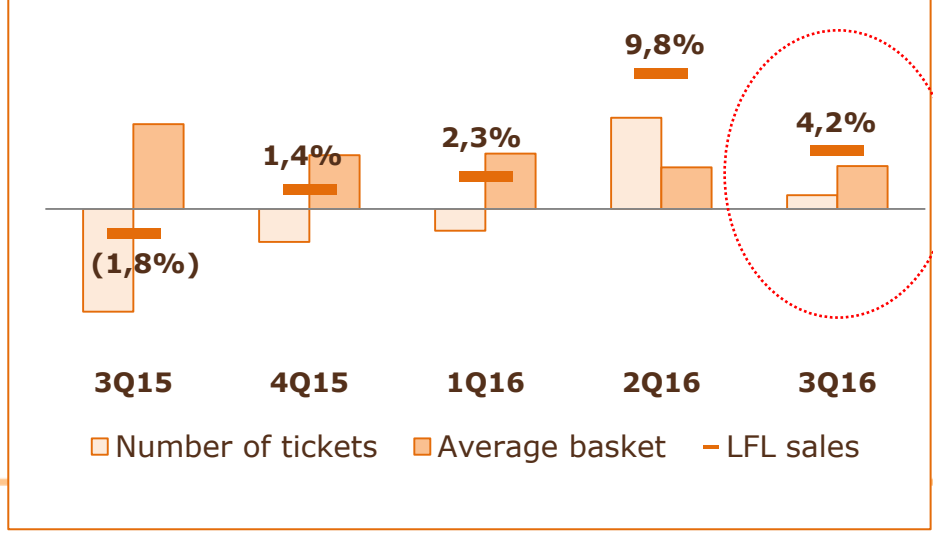
Organic expansion



Total revenue growth, % (y-o-y)

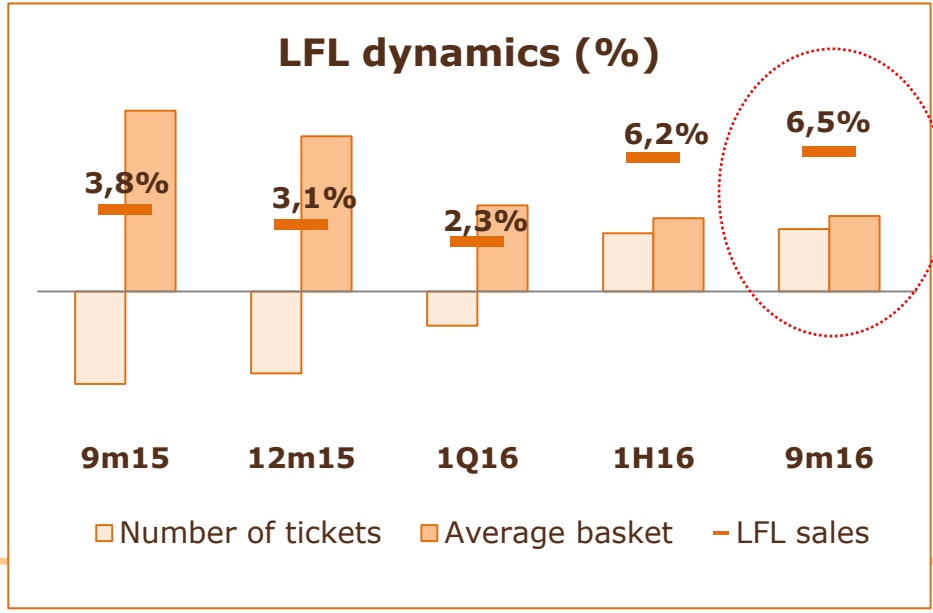
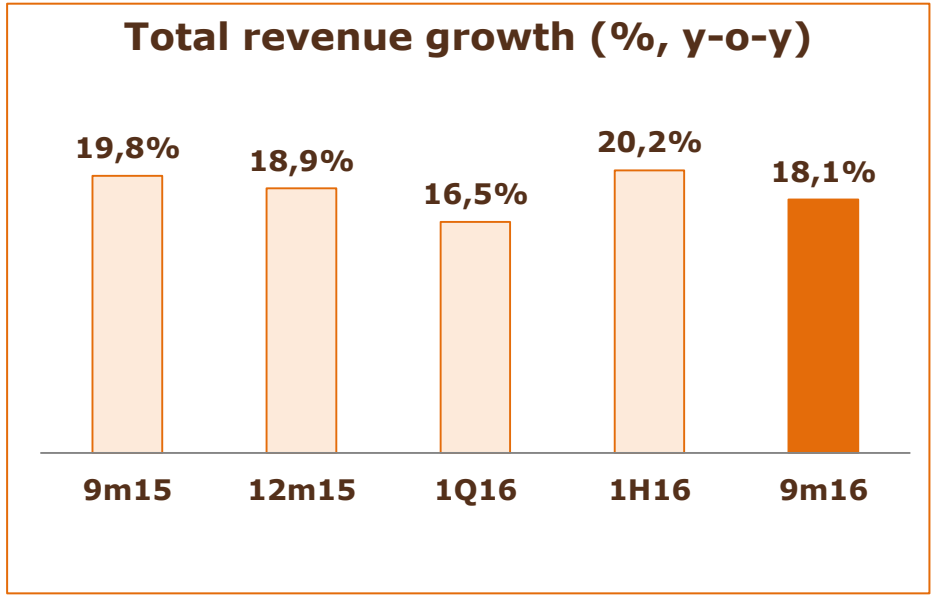
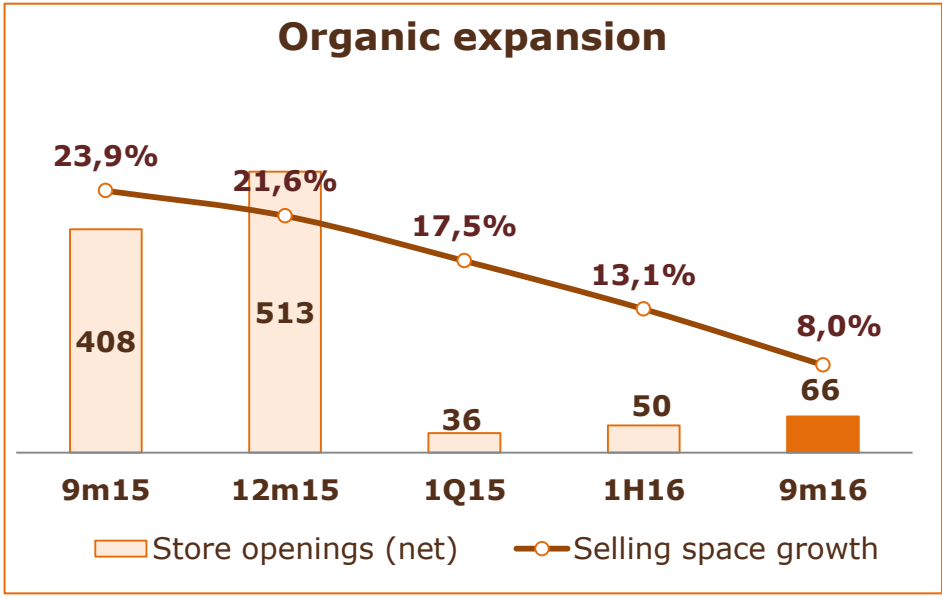


LFL sales dynamics, % (y-o-y)



Source: Company data

DIXY Group Performance 9m 2016

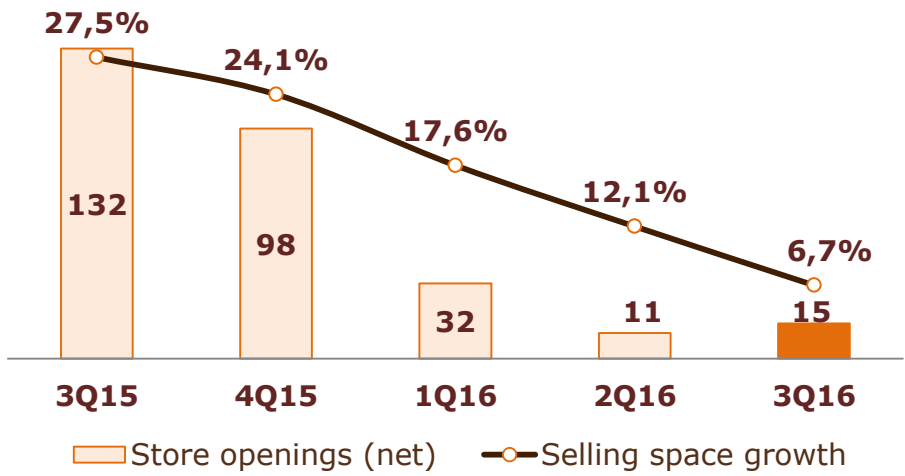


Source: Company data

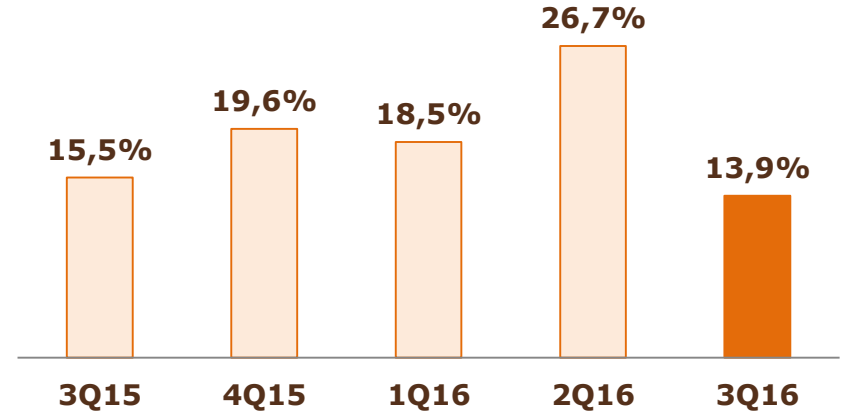
Formats' Performance Q3 2016

DIXY Division 3Q 2016 Performance

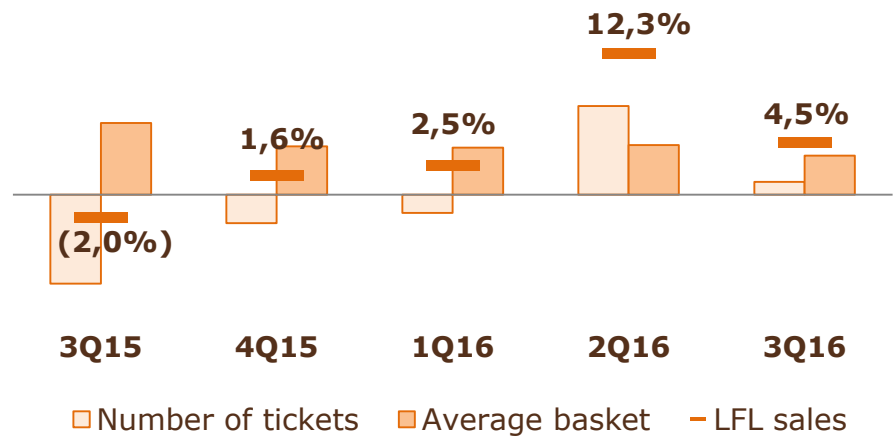
Organic expansion



Retail revenue growth, % (y-o-y)

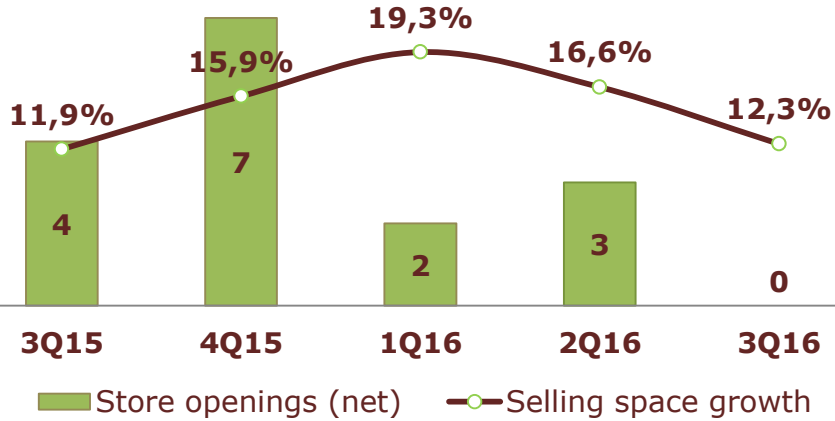


LFL sales dynamics, % (y-o-y)

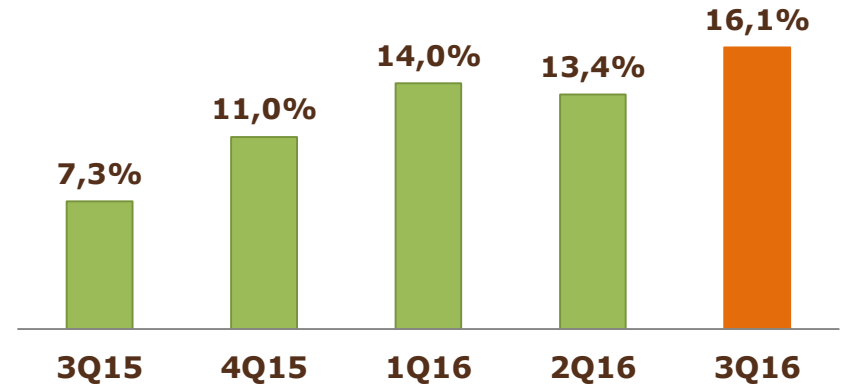


Victoria Division 3Q 2016 Performance

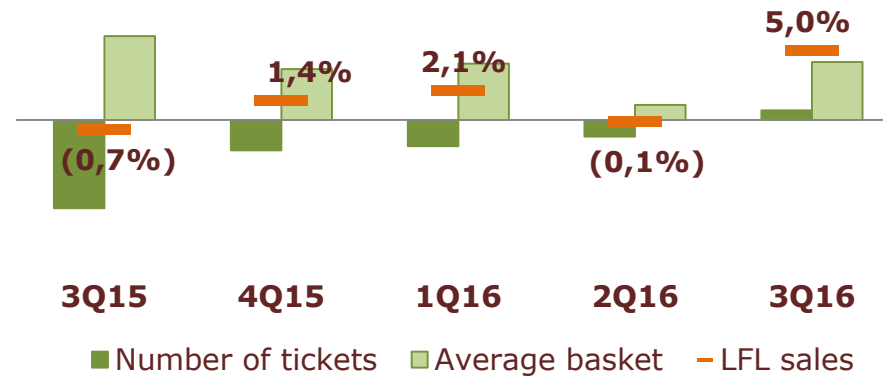
Organic expansion



Retail revenue growth, % (y-o-y)

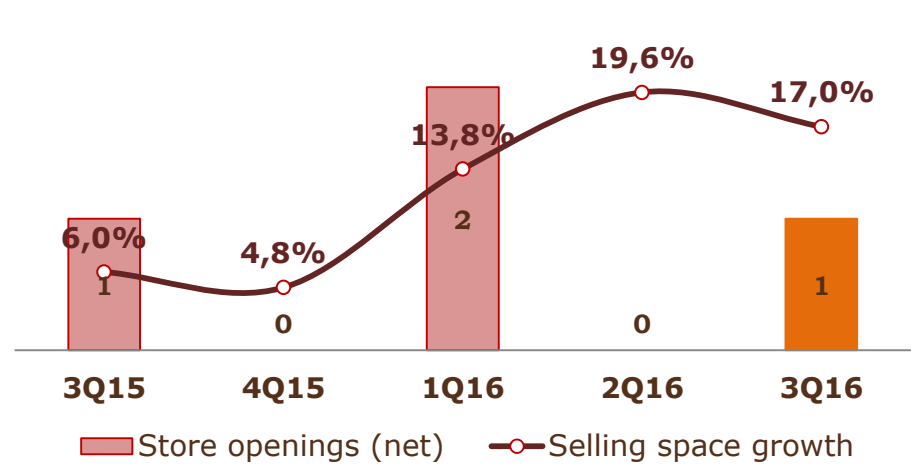


LFL sales dynamics, % (y-o-y)

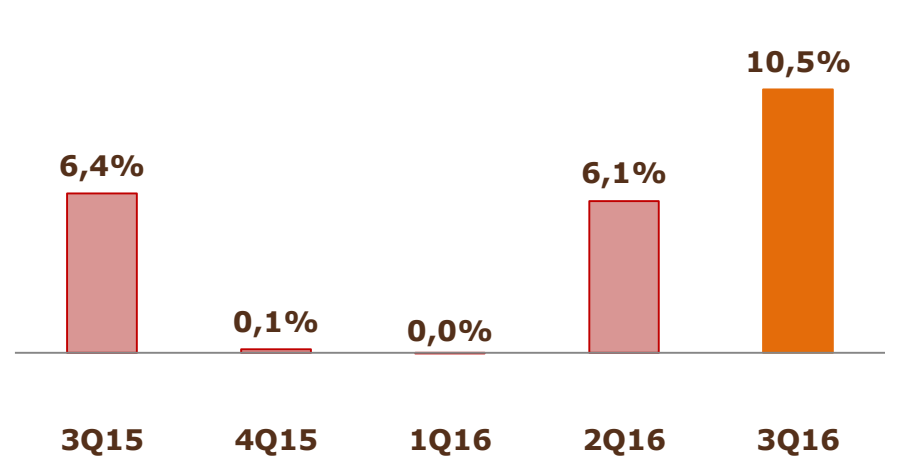


Megamart Division 3Q 2016 Performance

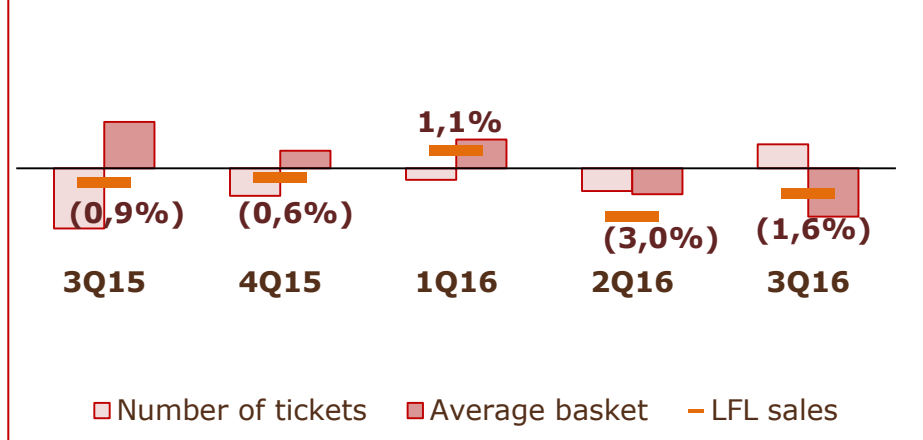
Organic expansion



Retail revenue growth, % (y-o-y)



LFL sales dynamics, % (y-o-y)



Appendix. DIXY Group Historical Operational Data

DIXY Group Operational Data Dynamics (1/3)

	3Q14	4Q14	1Q15	2Q15	3Q15	4Q15	1Q16	2Q16	3Q16
Total space, 000' m2	1,479	1,550	1,622	1,690	1,766	1,832	1,868	1,877	1,908
- DIXY division	1,165	1,228	1,299	1,360	1,426	1,479	1,503	1,510	1,517
- Victoria division	165.9	171.9	172.4	179.7	184.7	196.4	199.8	202.4	223.9
- Megamart division	148.2	150.5	150.5	150.5	155.1	156.4	165.0	165.0	167.1
Selling space, 000' m2	703.5	746.5	788.0	827.2	871.4	907.6	925.9	935.7	941.3
- DIXY division	562.7	601.1	643.2	678.8	717.5	746.1	756.6	760.7	765.5
- Victoria division	79.6	82.9	82.3	85.9	89.0	96.1	98.2	100.2	100.0
- Megamart division	61.2	62.5	62.5	62.5	64.8	65.5	71.1	74.8	75.9
Number of stores	2,068	2,195	2,338	2,466	2,603	2,708	2,744	2,758	2,774
- DIXY division	1,943	2,065	2,208	2,333	2,465	2,563	2,595	2,606	2,621
- Victoria division	91	95	95	98	102	109	111	114	114
- Megamart division	34	35	35	35	36	36	38	38	39

DIXY Group Operational Data Dynamics (2/3)

	3Q14	4Q14	FY14	1Q15	2Q15	3Q15	4Q15	FY15	1Q16	2Q16	3Q16
Total revenue, RUB billion	57.9	64.1	229.0	63.6	68.0	65.8	74.9	272.3	74.1	84.1	75.0
Retail revenue, RUB billion	57.4	63.6	227.1	63.1	67.5	65.3	74.5	270.5	73.6	83.5	74.4
- DIXY division	46.2	50.5	180.2	50.6	54.8	53.3	60.3	219.0	60.0	69.4	60.7
- Victoria division	7.2	8.4	29.9	8.2	8.1	7.7	9.3	33.3	9.3	9.2	9.0
- Megamart division	4.1	4.8	17.0	4.4	4.6	4.3	4.8	18.1	4.4	4.9	4.8
Average ticket, RUB	319	353	333	366	352	335	361	353	377	361	344
- DIXY division	296	323	306	339	327	312	334	328	351	339	321
- Victoria division	428	494	459	497	479	452	512	485	519	487	472
- Megamart division	587	671	613	644	629	607	671	638	642	618	592
# of customers, mln	204.7	205.2	775.6	196.2	218.3	222.3	235.1	871.9	222.7	263.7	246.1
- DIXY division	178.0	177.9	670.7	170.0	190.9	195.0	206.5	762.3	194.9	233.4	215.6
- Victoria division	18.9	19.1	73.2	18.4	19.1	19.2	20.4	77.1	20.1	21.3	21.3
- Megamart division	7.9	8.2	31.7	7.7	8.4	8.1	8.2	32.5	7.8	9.0	9.2

DIXY Group Operational Data Dynamics (3/3)

	3Q14	4Q14	FY14	1Q15	2Q15	3Q15	4Q15	FY15	1Q16	2Q16	3Q16
LFL, %	14.6%	14.6%	11.4%	11.7%	2.3%	(1.8%)	1.4%	3.1%	2.3%	9.8%	4.2%
- DIXY division	17.7%	17.0%	13.5%	13.0%	2.2%	(2.0%)	1.6%	3.3%	2.5%	12.3%	4.5%
- Victoria division	5.9%	8.2%	5.9%	9.1%	4.4%	(0.7%)	1.4%	3.4%	2.1%	(0.1%)	5.0%
- Megamart division	2.7%	4.3%	2.7%	2.9%	0.2%	(0.9%)	(0.6%)	0.3%	1.1%	(3.0%)	(1.6%)
LFL average basket, %	8.1%	10.5%	9.5%	11.5%	7.7%	6.2%	3.9%	7.2%	4.0%	3.0%	3.1%
- DIXY division	10.2%	12.0%	11.2%	12.8%	7.8%	6.2%	4.2%	7.6%	4.1%	4.3%	3.4%
- Victoria division	1.7%	6.8%	4.6%	7.6%	7.5%	6.1%	3.7%	6.2%	4.1%	1.1%	4.2%
- Megamart division	6.9%	9.5%	6.5%	7.4%	5.7%	2.9%	1.1%	4.2%	1.8%	(1.6%)	(3.0%)
LFL number of tickets, %	6.0%	3.7%	1.7%	0.1%	(5.0%)	(7.5%)	(2.4%)	(3.8%)	(1.6%)	6.6%	1.0%
- DIXY division	6.8%	4.4%	2.1%	0.2%	(5.2%)	(7.8%)	(2.5%)	(4.0%)	(1.6%)	7.7%	1.1%
- Victoria division	4.1%	1.4%	1.2%	1.4%	(2.9%)	(6.4%)	(2.2%)	(2.6%)	(1.9%)	(1.2%)	0.7%
- Megamart division	(4.0%)	(4.8%)	(3.6%)	(4.2%)	(5.2%)	(3.7%)	(1.7%)	(3.7%)	(0.7%)	(1.4%)	1.5%

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