WARRIX®

SPORT PUBLIC COMPANY LIMITED

1Q25 Analyst Meeting

22 May 2025

Agenda

01 1Q25 Financial Performance

02 2025 Key Strategies

03 Business Update & Outlook

01

1Q25 Financial Performance

1Q25 Financial Performance (Separate)

Unit: THB million

Separate P&L Statement	1Q24	4Q24	1Q25	%QoQ	%YoY
Revenues from core operation	**322**	**427**	**321**	**-25%**	**-0.2%**
COGS	160	217	166	-24%	4%
Gross Profit	**162**	**210**	**155**	**-26%**	**-4%**
Other Income	7	5	5	6%	-30%
SG&A	135	147	152	3%	13%
EBITDA	**50**	**85**	**26**	**-69%**	**-48%**
Net Profit	**26**	**52**	**5**	**-90%**	**-81%**
Adjust	-	(0.6)	-	-100%	-
Net Profit after Adjust	26	52	5	-90%	-81%

Separate P&L Statement	1Q24	4Q24	1Q25	%QoQ	%YoY
% Gross profit	50.4%	49.1%	48.3%	-0.8%	-2.1%
% SG&A	41.9%	34.5%	47.2%	12.7%	5.3%
% EBITDA	15.6%	19.9%	8.1%	-11.8%	-7.5%
% NI	8.1%	12.2%	1.6%	-10.6%	-6.5%

Key factor affecting 1Q25 Performance:

- Missed target revenues, esp. MT Channel.
- A key driver of sales growth was the Non-Licensed product, which yielded lower GPM.
- Allowance for slow-moving inventories regarding financial reporting standards affects GPM.
- Increased selling exp., which are now under control.

1Q25 Financial Performance (Consolidated)

Unit: THB million

Consolidated P&L Statement	1Q24	4Q24	1Q25	%QoQ	%YoY
Revenues from core operation	**328**	**447**	**330**	**-26%**	**1%**
COGS	164	225	172	-23%	5%
Gross Profit	**164**	**222**	**158**	**-29%**	**-3%**
Other Income	8	4	5	15%	-38%
SG&A	143	153	158	3%	11%
EBITDA	**46**	**93**	**24**	**-74%**	**-47%**
Net Profit	**20**	**57**	**2**	**-97%**	**-92%**
Adjust	0.9	(0.7)	0.8	-212%	-15%
Net Profit after Adjust	21	57	2	-96%	-89%

Consolidated P&L Statement	1Q24	4Q24	1Q25	%QoQ	%YoY
% Gross profit	49.9%	49.7%	47.9%	-1.9%	-2.0%
% SG&A	43.6%	34.3%	47.8%	13.5%	4.2%
% EBITDA	14.0%	20.7%	7.3%	-13.4%	-6.7%
% NI	6.2%	12.8%	0.5%	-12.34%	-5.7%

Key factor affecting 1Q25 Performance:

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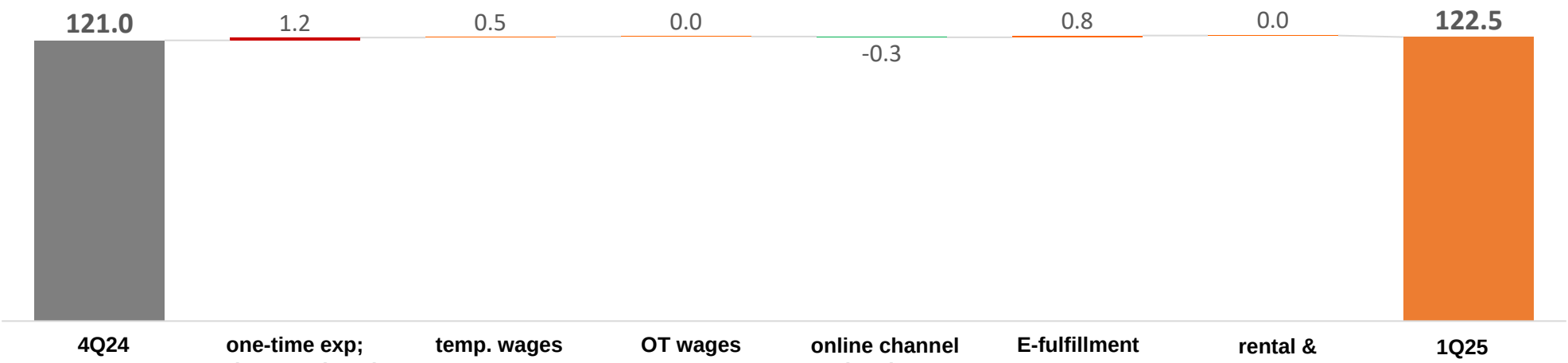
Key Financial Performance

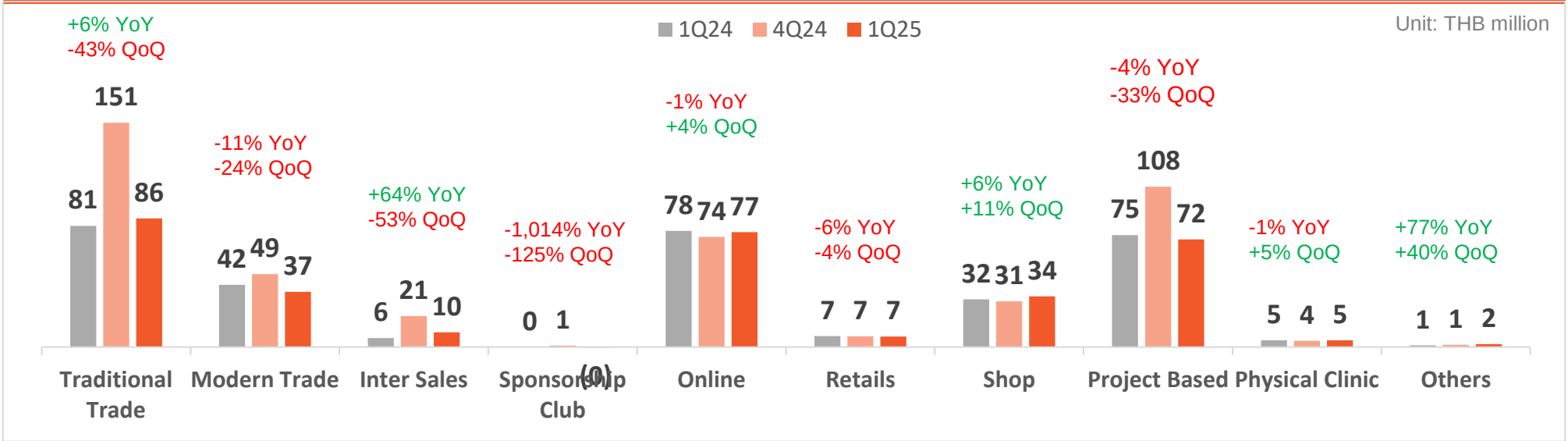
Highlight YoY Change in Selling Expenses

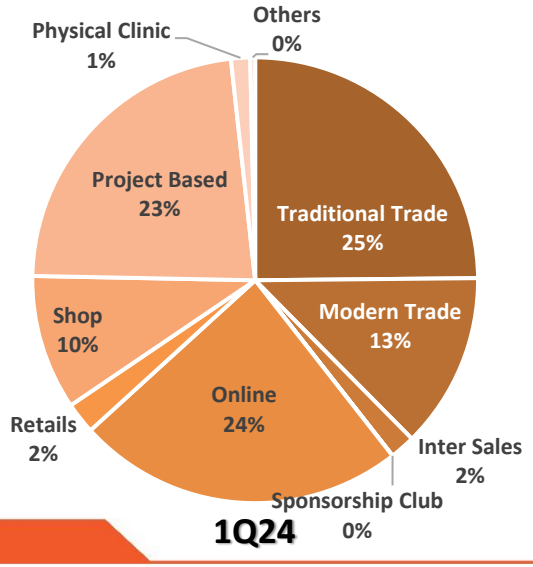
Highlight QoQ Change in Selling Expenses

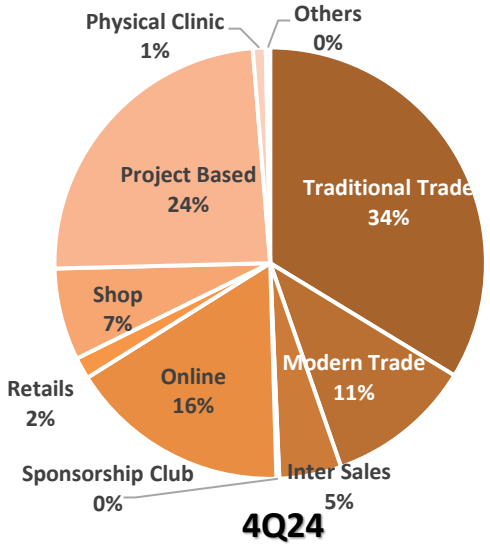


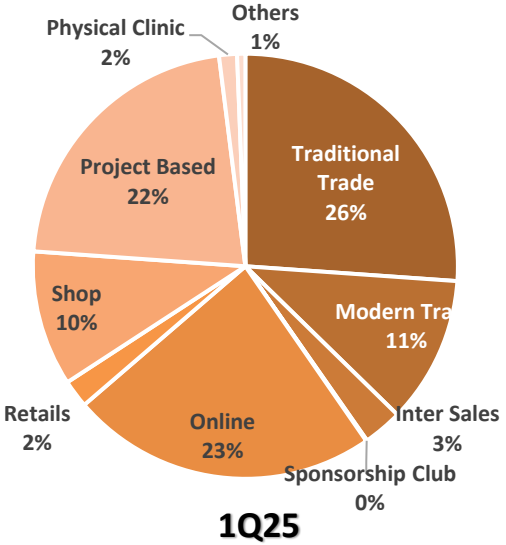
Key Financial Performance

Revenues Breakdown By Channel



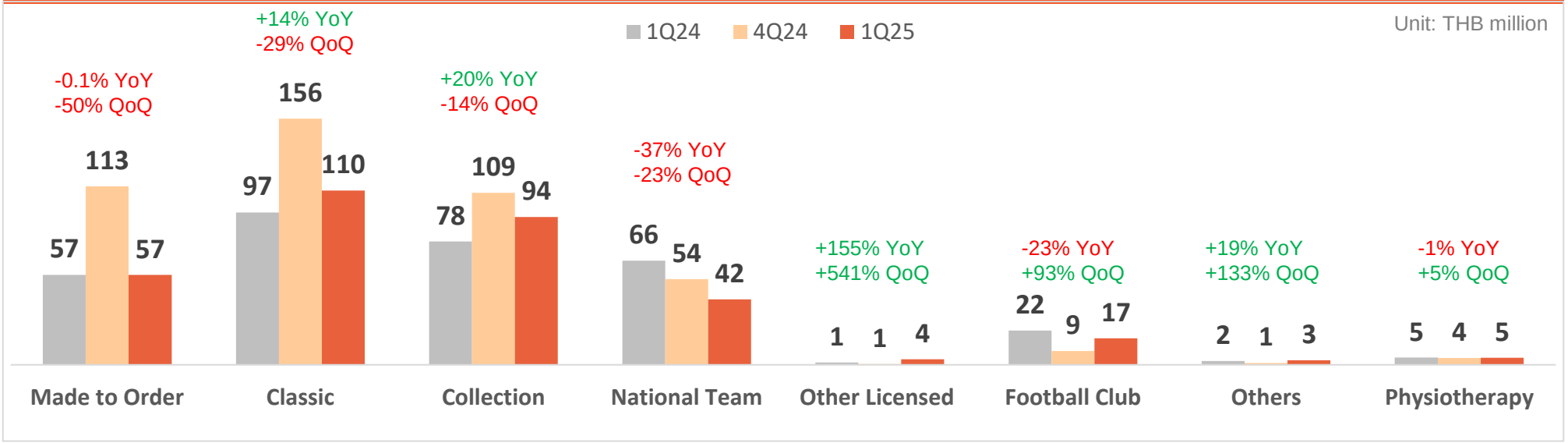


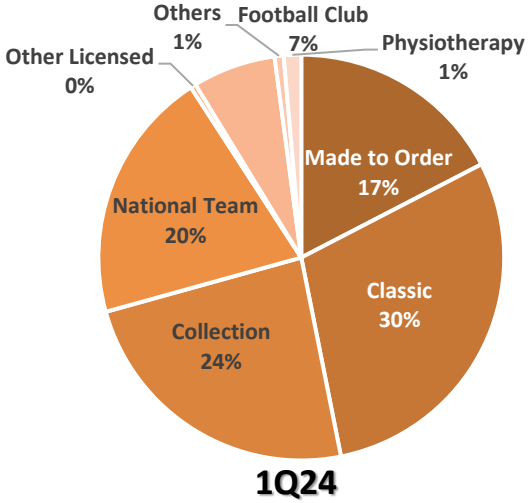


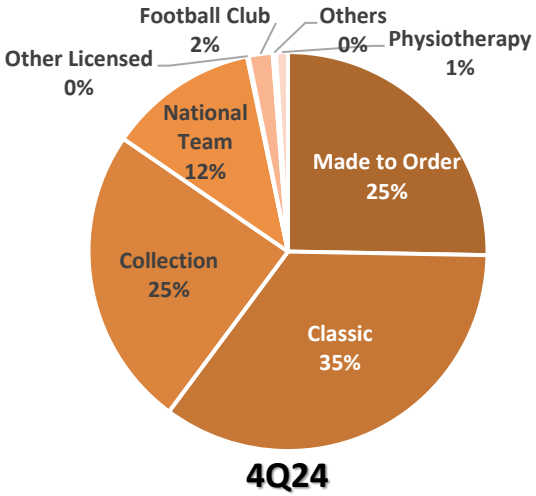


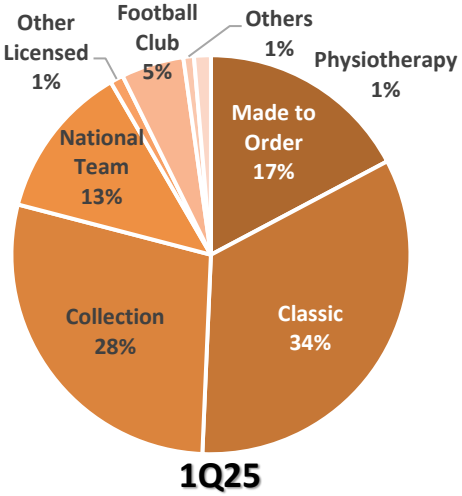
Key Financial Performance

Revenues Breakdown By Product



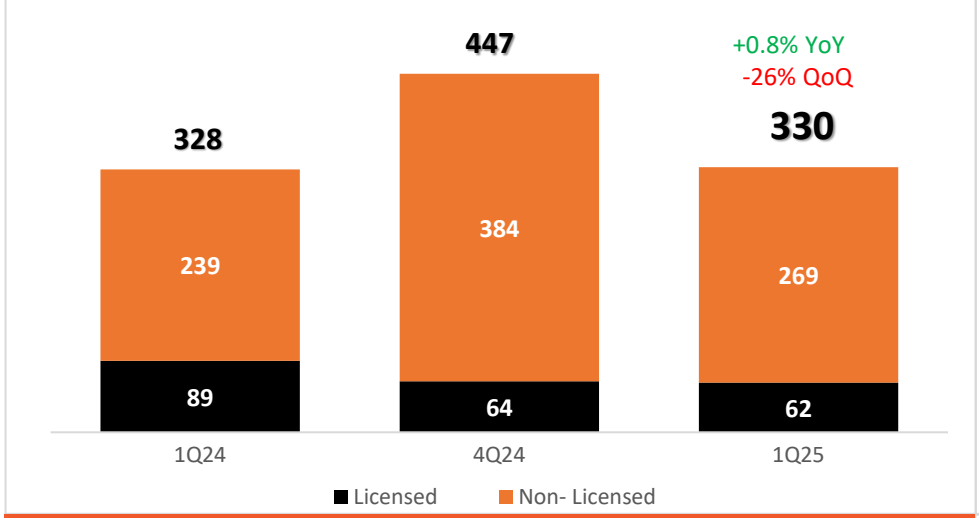




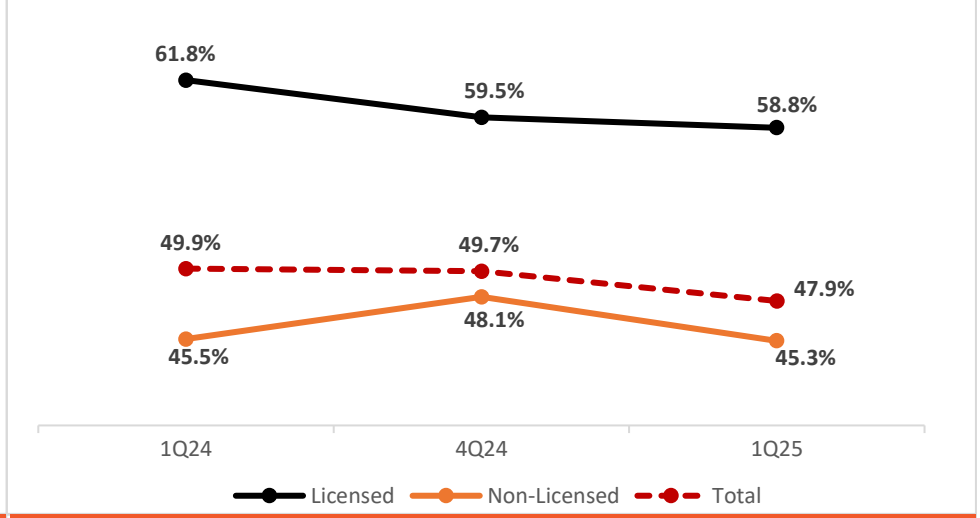


Key Financial Performance

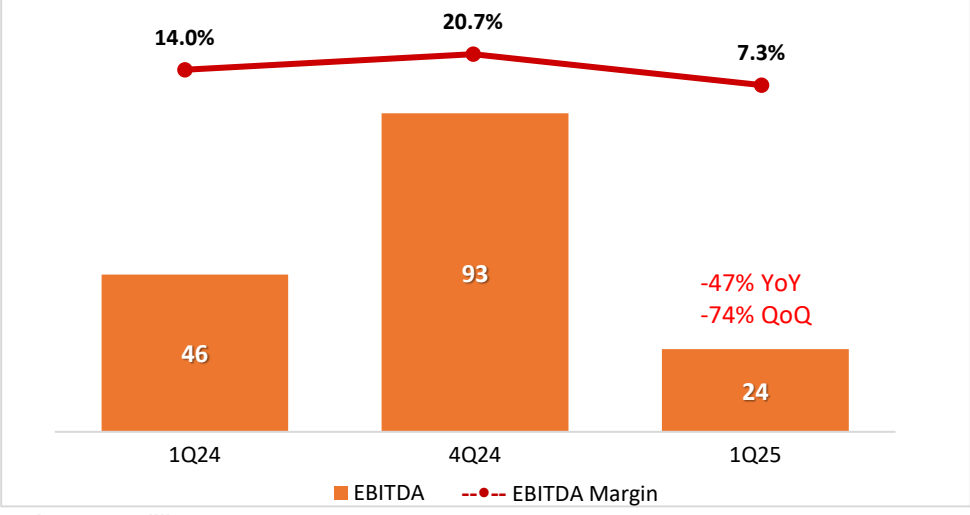
Revenues



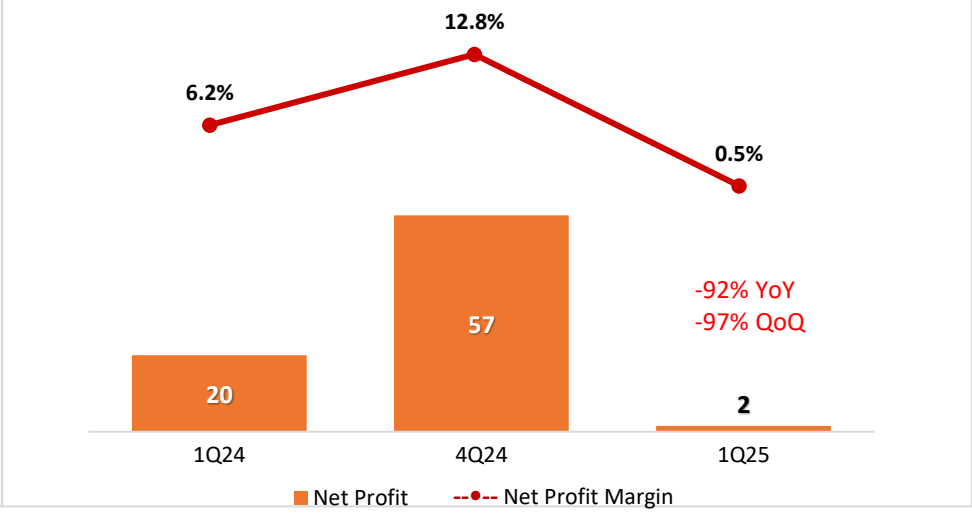
Gross Profit Margin



EBITDA



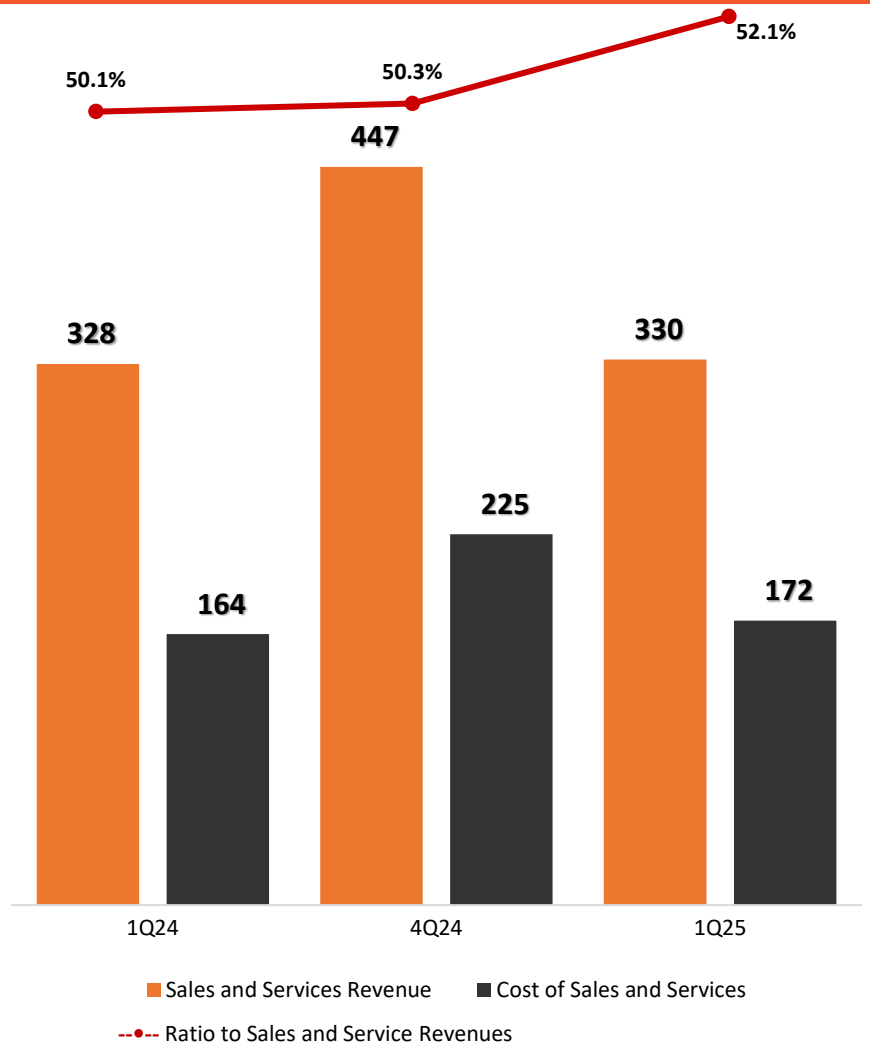
Net Profit



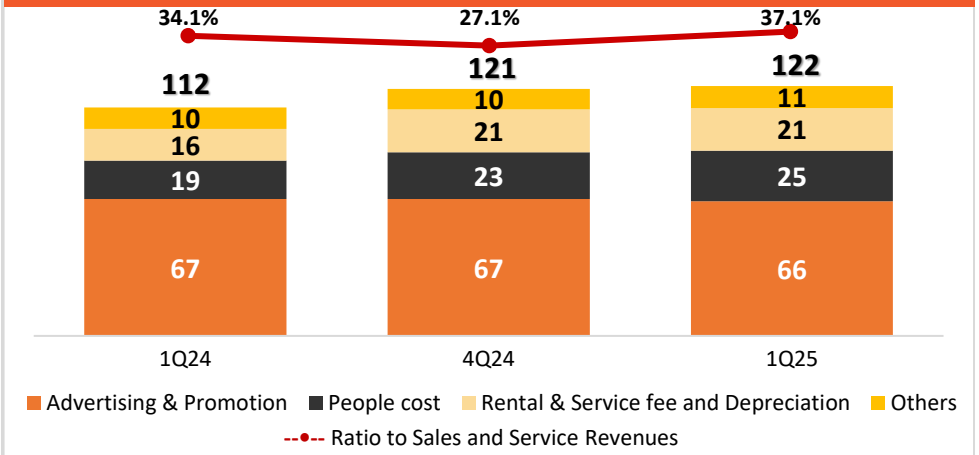
Unit: THB million

Key Financial Performance

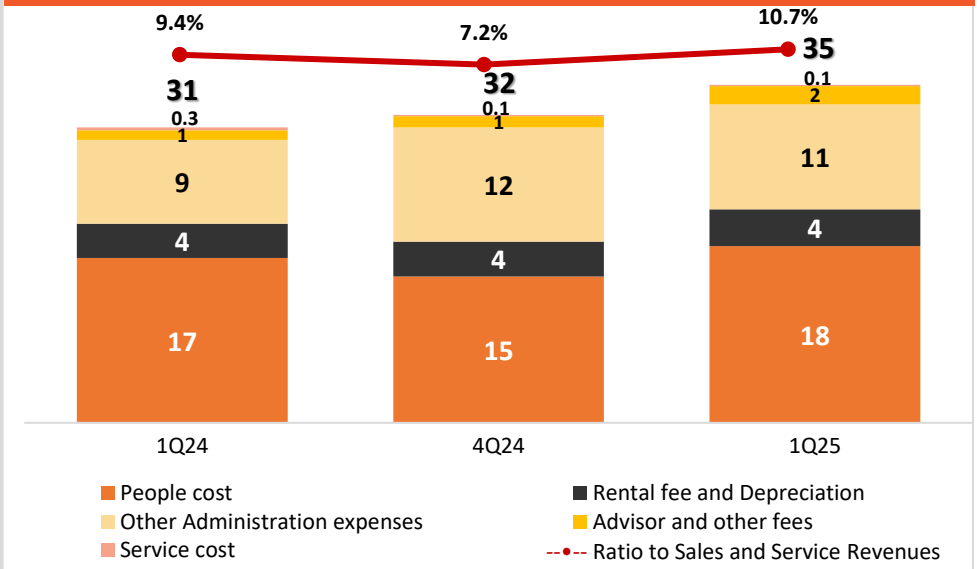
Cost of Sales and Services



Selling Expenses



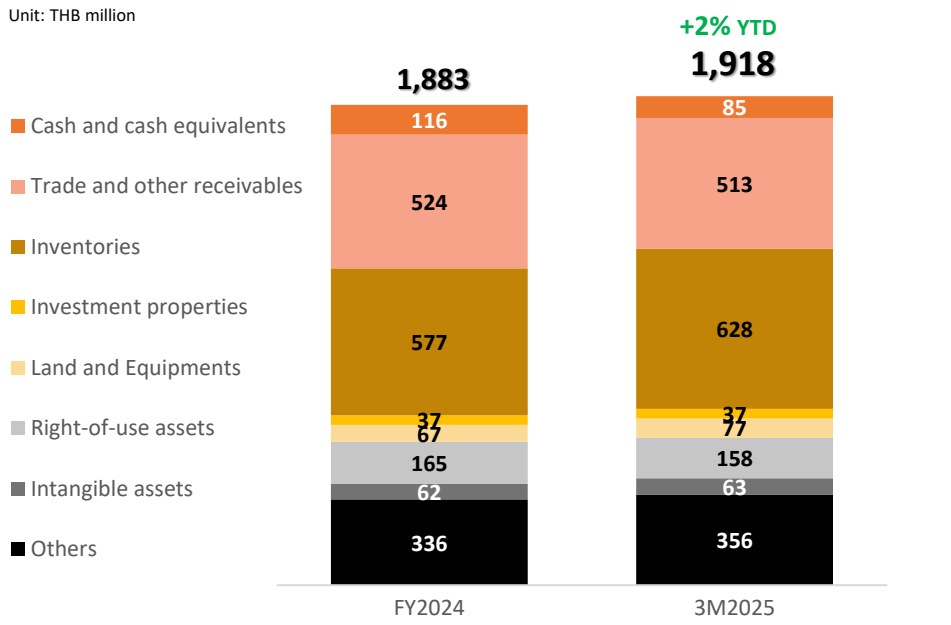
Administration Expenses



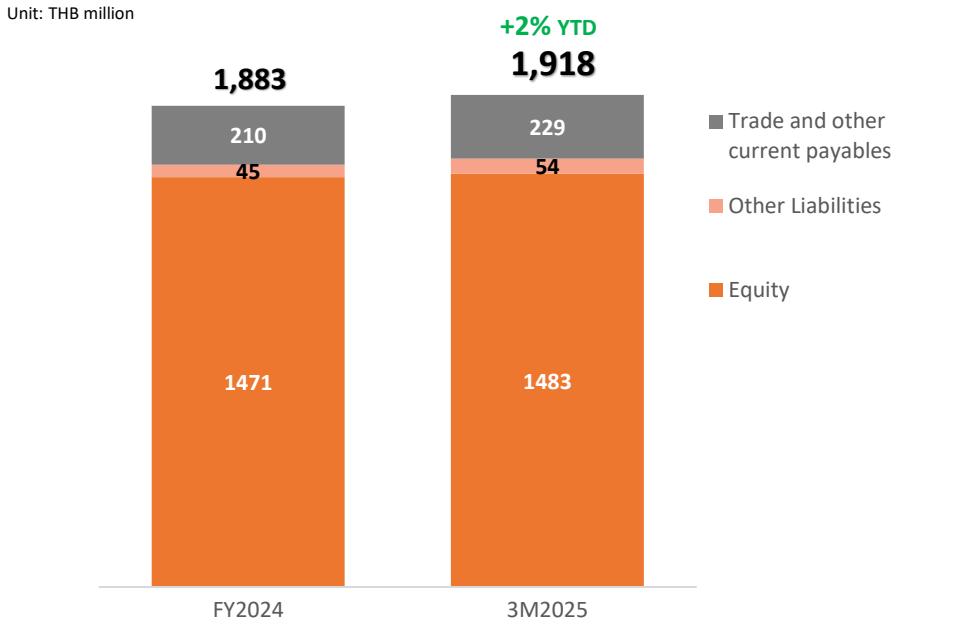
Unit: THB million

Balance Sheet

Assets



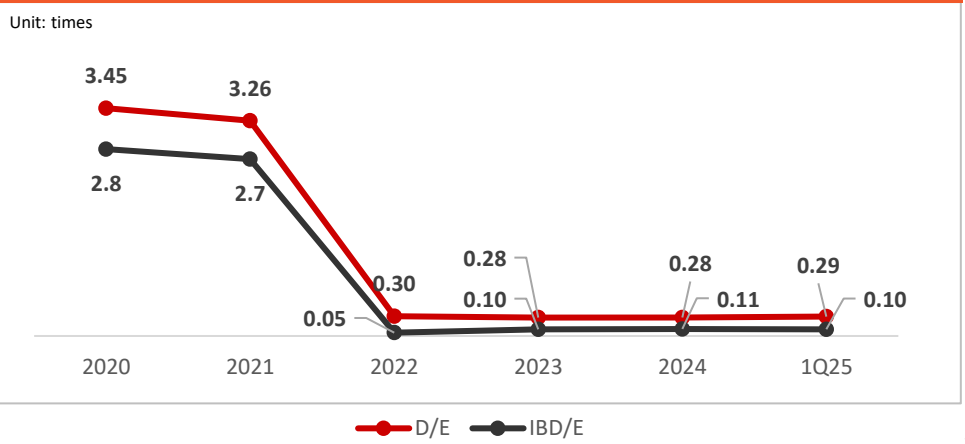
Liabilities & Equity



Key Financial Ratio

Key Financial Ratio	1Q24	2Q24	3Q24	4Q24	1Q25
Current ratio (Times)	5.78	5.59	5.07	5.59	5.09
Inventory Turnover (days)	299	262	235	231	319
AR Turnover (days)	91	80	76	94	143
AP Turnover (days)	104	87	85	86	116
Cash Cycle (days)	285	255	226	240	346

Financial Leverage



02

2025 Key Strategies

2025 Key Strategies

Brand Building

- Improve brand positioning: stretch brand awareness to regional active & lifestyle brand to capture new-wider target groups and growing brand awareness of its non-license products.
- Enhance communication of each sales channels.
- Strengthen 'Run Hub' as Lifestyle Sport Community.

Cost Management

- Cost improvement from higher bargaining power with suppliers and better value chain management.
- Efficient inventory management i.e. using data analytic program for inventory forecast, SKUs refurbishment.

Focus on Direct to Customer (Own Channels from 54% in 2024 to 65% in 2025)

- Expand distribution channel, mainly focus on own channels; 24 new (temporary) shops, online
- Increasing high margin product mix.
- AI-Driven Efficiency.
- Develop every touch point for better customer experience.

New Partnership

- Expand new partnership through licensing strategy to diverse customer target groups in SEA.
- Potential new business expansion related to health and lifestyle.

2025 Key Strategies

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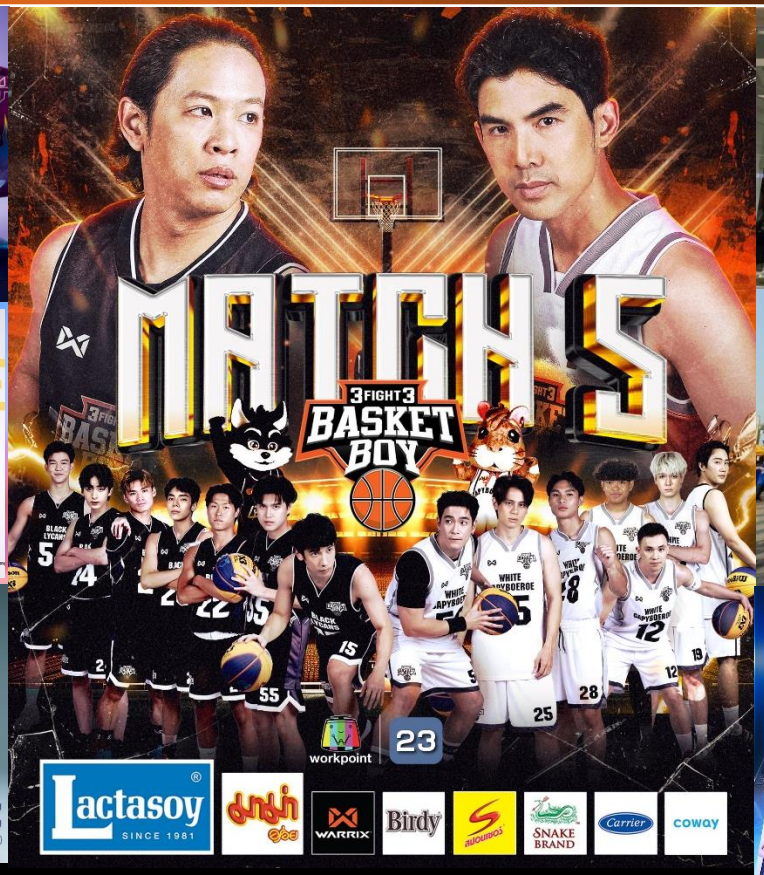
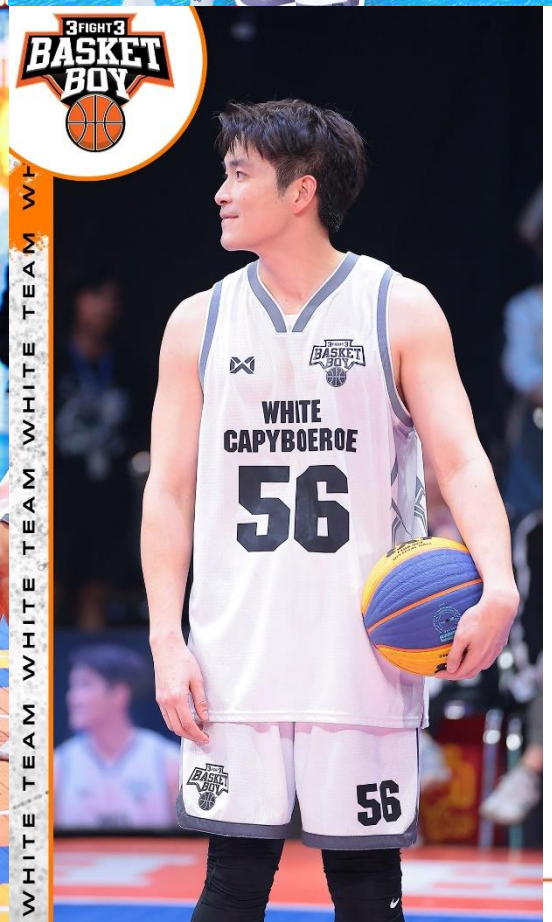
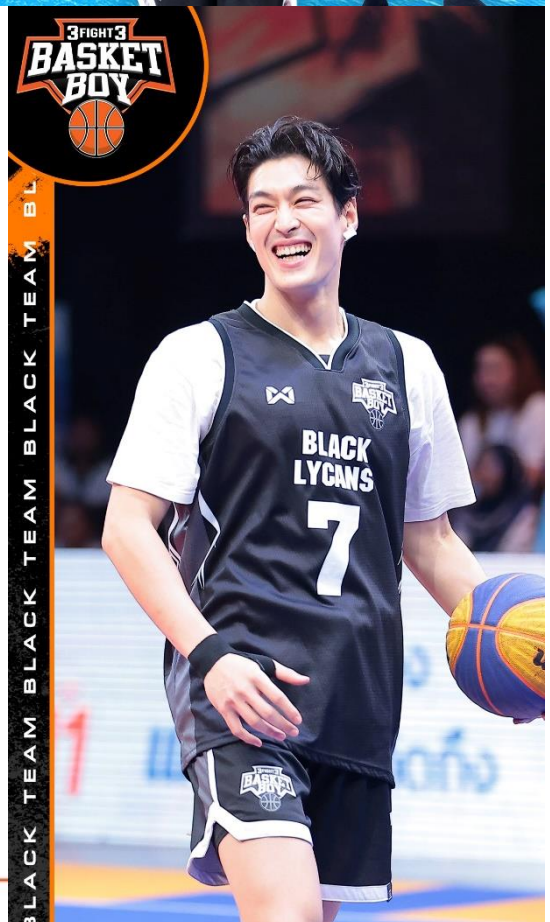


- Register Warrix as not only football wear, but lifestyle and sportswear for everyday use.
- Utilize its licenses/presenters to capture new-wider target groups and create sales for all Warrix’s products.
- By using ONE take-out brand message & impact brand visibilities.

3FIGHT3
BASKET BOY
WARRIX
Birdy
JOSS
WHITE CAPYBOEROE
56
23

workpoint
WARRIX
WARRIX BASKET BOY
COLLECTION
3FIGHT3
BASKET BOY
BASKET BOY LOOK
เท่แบบนักกีฬา สไตล์ไอดอล!
WHITE CAPYBOEROE
23
78
33
BLACK LYCANS
99
WHITE
BLACK


3FIGHT3
BASKET BOY
WHITE TEAM WHITE TEAM WHITE TEAM
WHITE CAPYBOEROE
56


3FIGHT3
BASKET BOY
BLACK TEAM BLACK TEAM BLACK TEAM
BLACK LYCANS
7

WARRIX
SMILEY WORLD
SMILE. SHOOT.
REPEAT
WARRIX | SMILEYWORLD
BASKETBALL SET

EVERY MOVE MATTERS
WARRIX

EVERY MOVE MATTERS
WARRIX

STUDIO 1
WARRIX

EVERY MOVE MATTERS
WARRIX

EVERY MOVE MATTERS
STUDIO
WARRIX

2025 Key Strategies

Focus on Direct to Customer (Own Channels from 54% in 2024 to 65% in 2025)

- Expand distribution channel, mainly focus on own channels; 20 new (temporary) shops and online.
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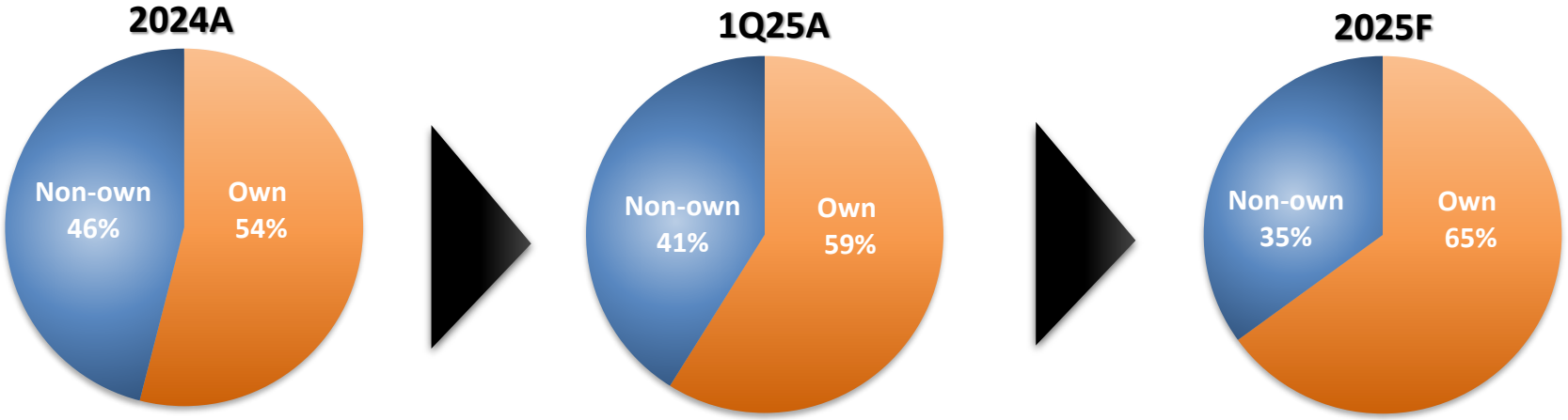

Permanent Shop

14 Permanent
(Long-term rental contract >1 yr.)

- 4 Flagship / Hub
- 7 Official Shop
- 3 Outlet

Temporary Shop

3 Temporary
(Short-term rental contract 6-12 mo.)

- 2 Official Shop
- 1 Outlet

As of 31 Mar 2025

Warrix's Own Shop:

Permanent Shop

14 Permanent
(Long-term rental contract >1 yr.)

- **4** Flagship / Hub
- **7** Official Shop
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As of 31 Mar 2025

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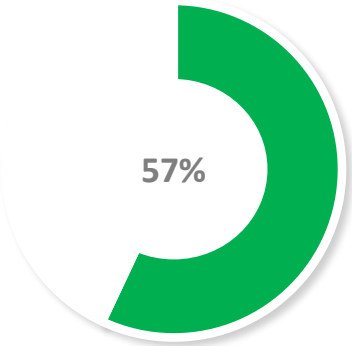
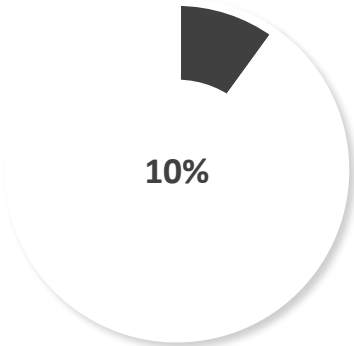
2025 Warrix's shop expansion plan



9 Discount Store

7 Department Store



3 Flagship & Hub

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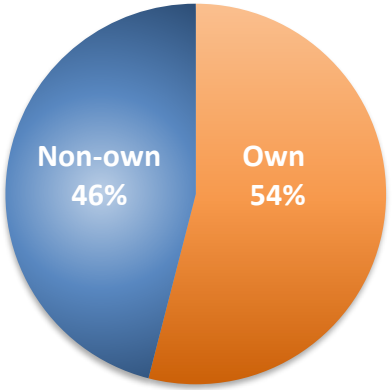
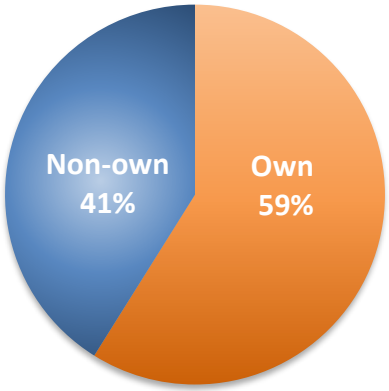
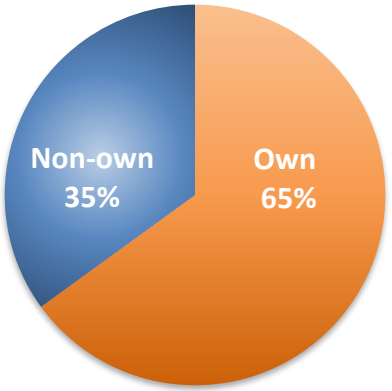
2024A



1Q25A



2025F



2024

Store No.9-16 :

+ 5 Permanent Shop / Outlet

+ 3 Temporary Shop / Outlet

Jan

Store No.17: (Hub Store)
KSL SPORT x WARRIX

2Q25

Store No.18-20: (Temp)

~ 3 Temporary Shops in Discount & Department Store

Store No.21: (Hub Store)

Hub Store
ESIE PLAZA 1
in Eastern Seaboard Industrial Estate (Rayong)

2025 Key Strategies

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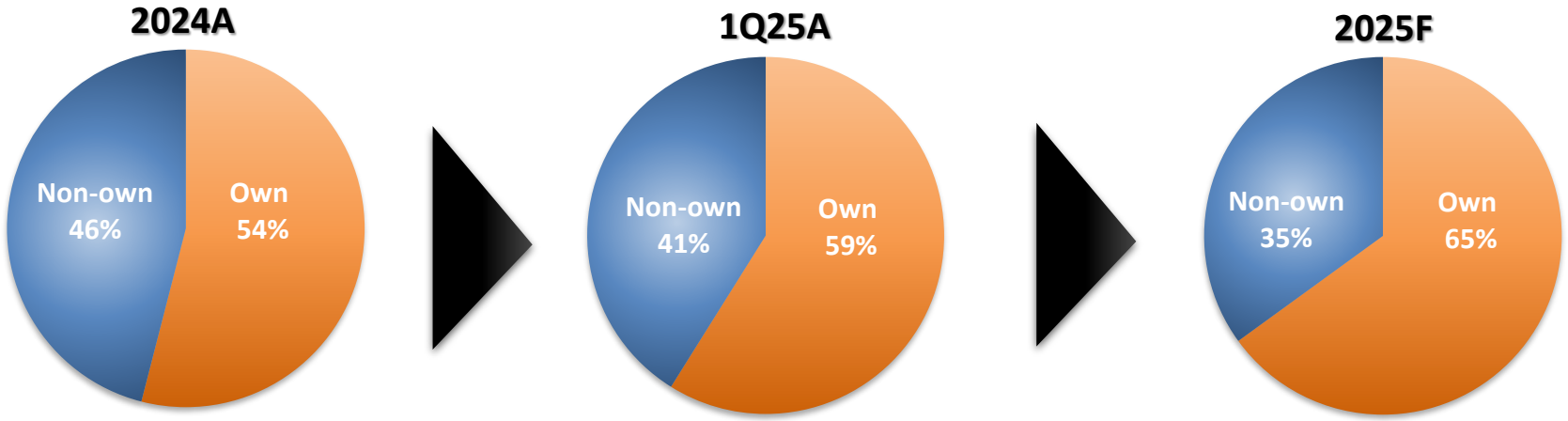


3Q25

4Q25

Store No.22: (Temp)	Store No.23-33: (Temp)	Store No.34-37: (Temp)	Store No.38:
Temporary Shop Central Hatyai	~ 9 Temporary Shops in Discount & Department Store	~ 5 Temporary Shops in Discount & Department Store	Flagship Muang Thong Thani 1,000 sqm.

2024 Key Strategies

New Partnership

- Expand new partnership through licensing strategy to diverse customer target groups in SEA.
- Potential new business expansion related to health and lifestyle.

Official Licenses

Thailand National & Thai League

(New) (New)

International Football Club

(New)

Other Sport Licenses

Educational & Academy Licenses

International Distributor

Corporate & Project

Partnership

and more

(New)

New Partnership

WARRIX x SUKHOTHAI FC

Official Partner
2025/2026

New Partnership

WARRIX x KANCHANABURI POWER FC

Official Partner
2025/2026

Official License | Football Club in Thai League 2

New Partnership

WARRIX x KELANTAN RED WARRIOR FC

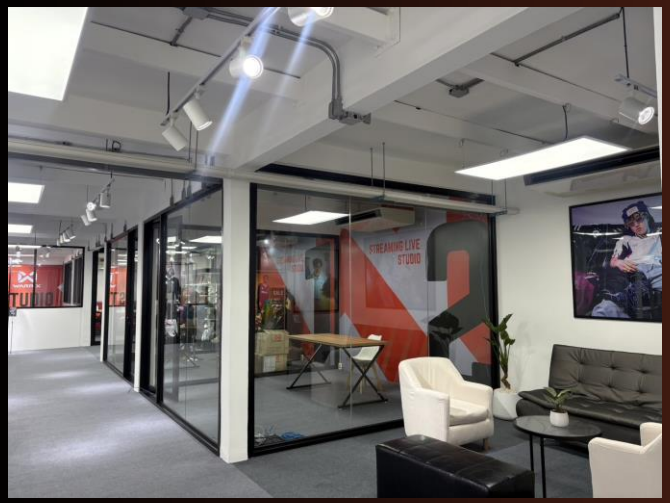
Official Partner
2025/2026 – 2026/2027

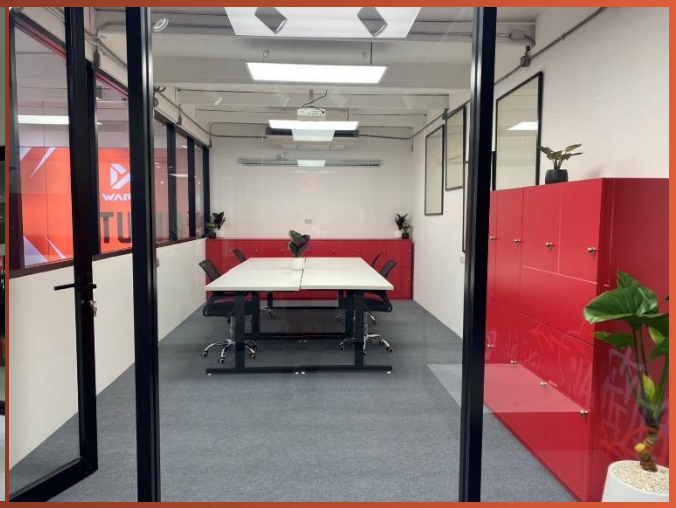
Official License | International Football Club in Malaysia A1 Semi-Pro League

New Partnership

WARRIX x TikTok

Live Base Center





New Partnership

03

Business Update & Outlook

Warrix International in Recovery

Warrix Singapore:

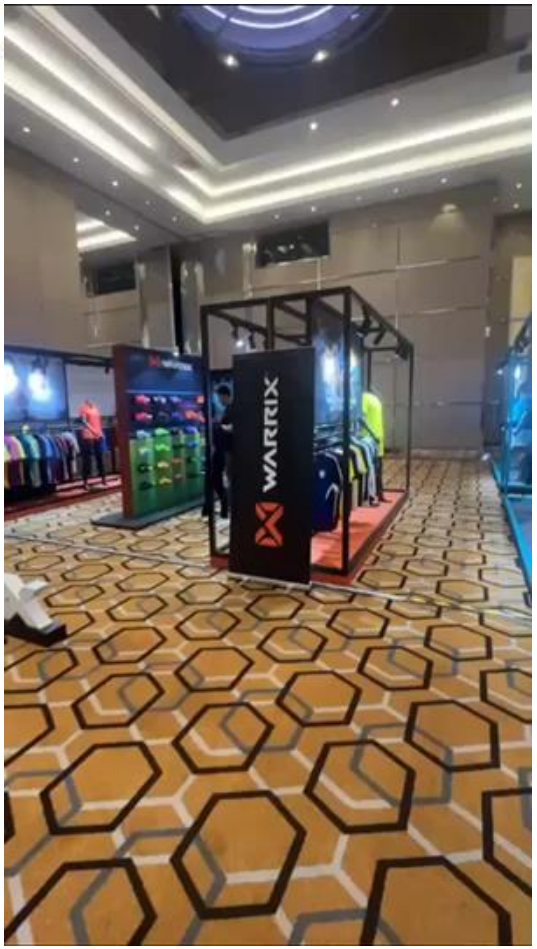
- Operations will be supported by USS appointed as the primary distributor.
- This partnership is expected to streamline logistics and distribution for both offline and online channels, including PFI stores.
- With licensing model, USS will have rights to manufacture and distribute football and futsal shoes under Warrix's trademark.

Warrix Malaysia:

- USS as the exclusive distributor has launched 1st physical store at Central I City in Nov 2024, with plans for a 2nd location in Negeri Sembilan in 2025.
- USS leverages football licenses to penetrate market with localized marketing and introduce Warrix to wholesale dealers for potential sales opportunities.

The partnership with **Universal Sports** marks a significant milestone in Warrix's international recovery, reinforcing brand expansion, localized market engagement, market penetration in Malaysia and Singapore, and cost optimization.

Warrix International in Recovery



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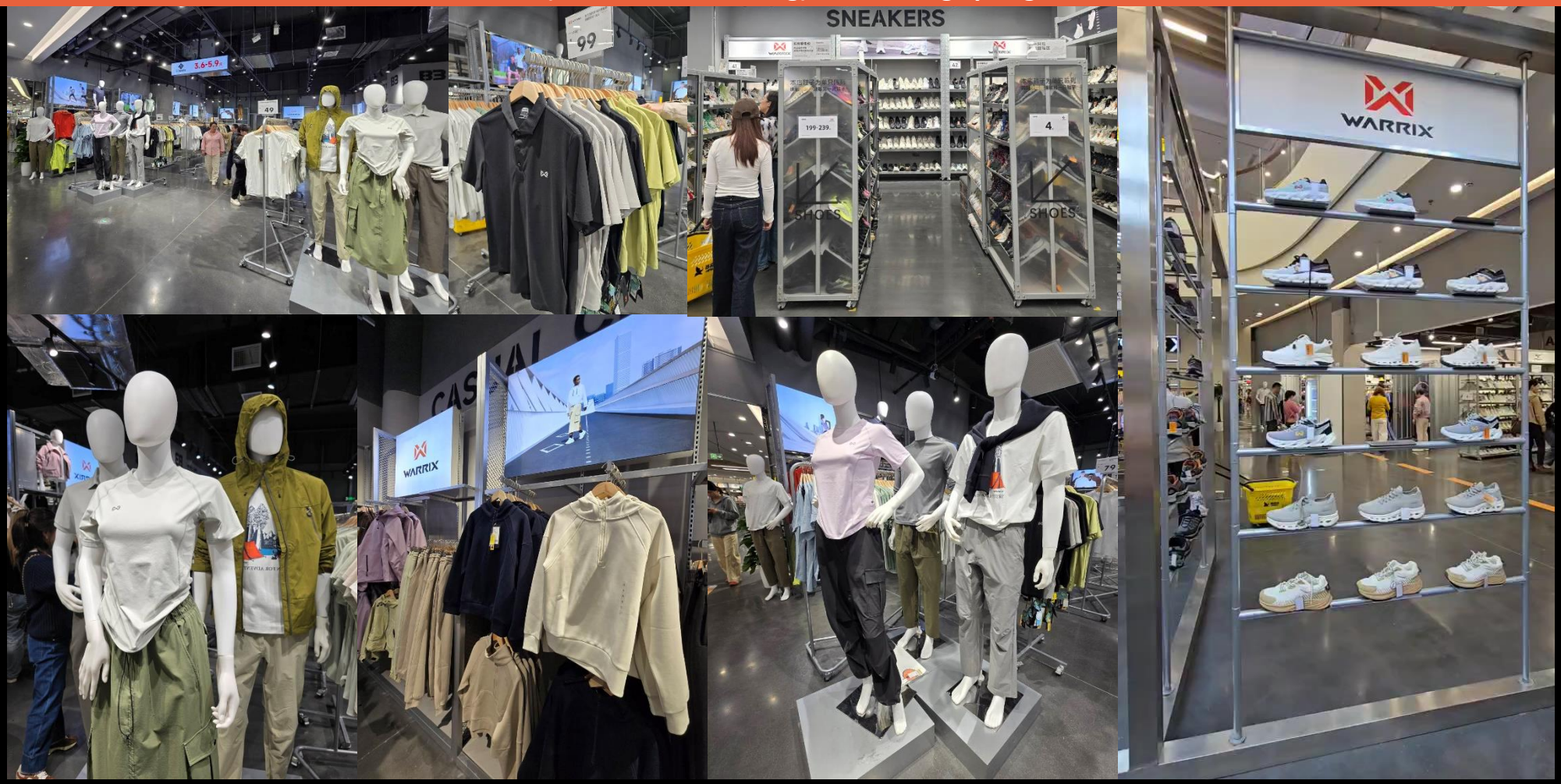
Leveraging new partnership to penetrate Chinese market

WARRIX

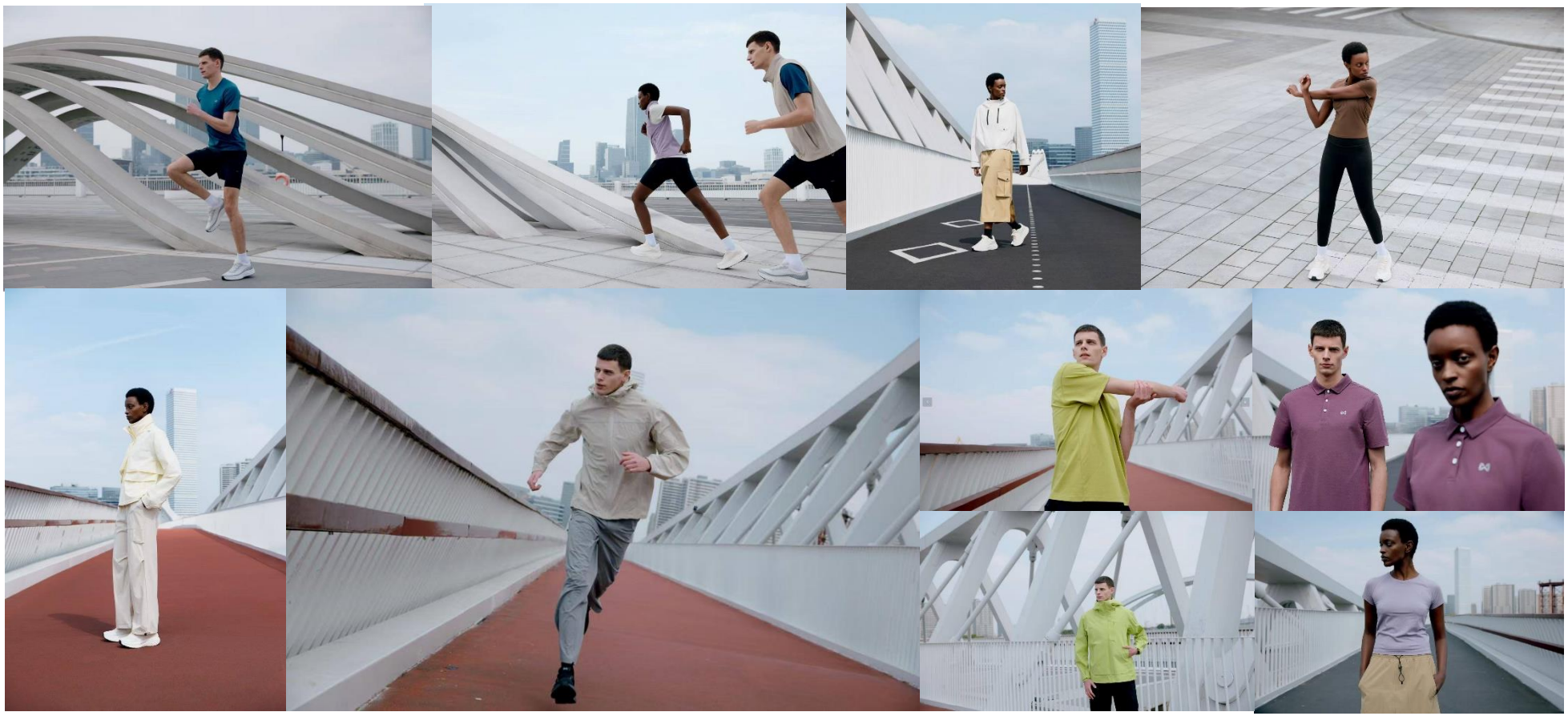
Himaxx x Warrix (Trademark Licensing) : Launching Spring 2025 Collection



- **Launched F/W 2024 Collection in first Himaxx Outlet Store since September 2024 to 26 stores with Warrix product at the present (+10 stores YTD) and aims to reach 60-70 stores with Warrix product by 2025. (Himaxx now has 50 stores around Shanghai and aims to reach 100 stores by 2025)**
- **Opportunities to cross borders for some items to leverage economies of scale of production and R&D costs, resulting in better COGS management.**

WARRIX Spring 2025 Collection

(Trademark Licensing)



WARRIX Spring 2025 Collection

(Trademark Licensing)

Efficiency Improvements in Distribution

Fully Operating New Warehouse

Existing Warehouse operated by 3rd party Fulfillment

5,300 sqm.

New Warehouse operated by Warrix

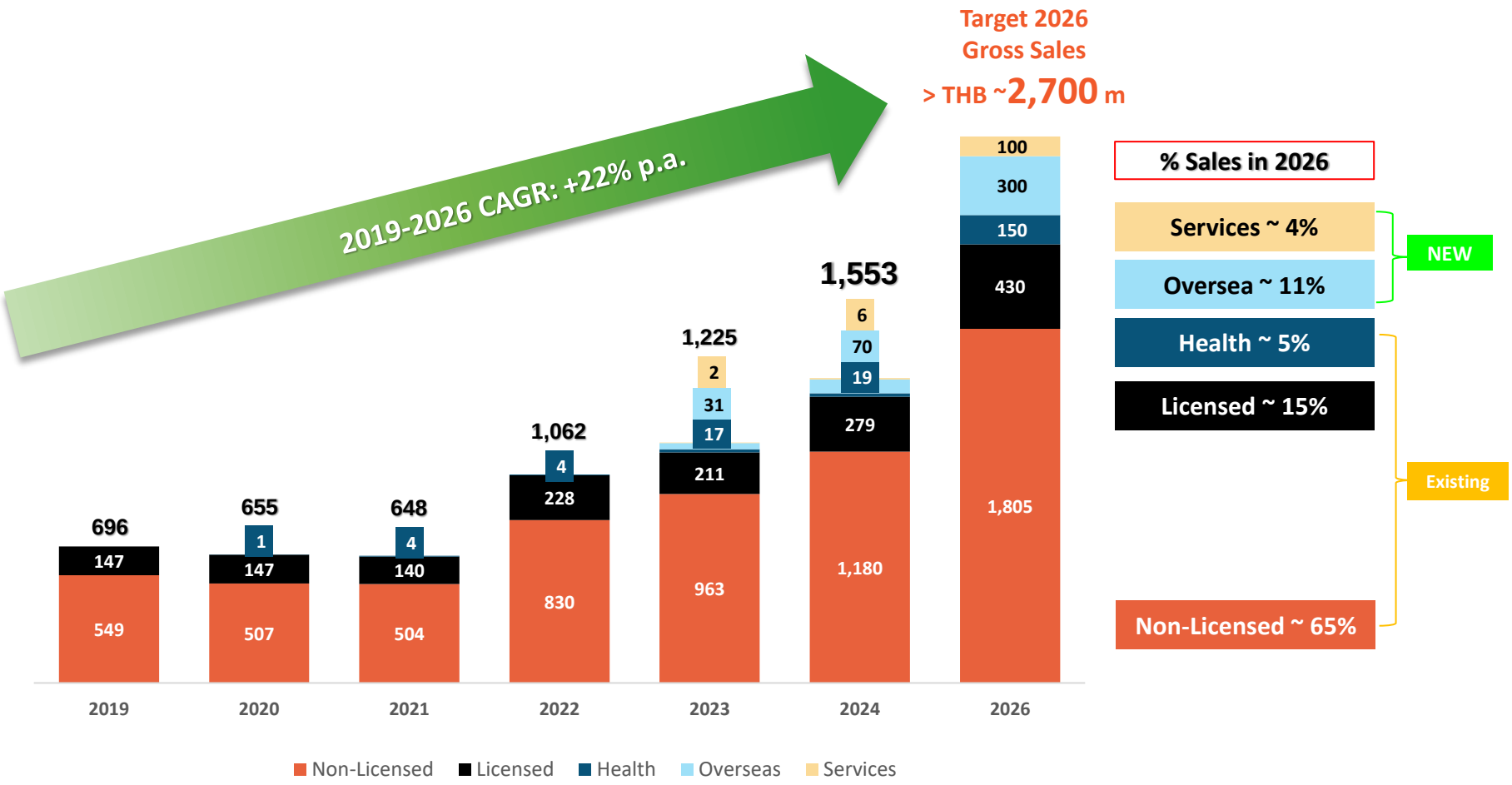
7,369 sqm. sqm.

- To improve its distribution efficiency, Warrix decided to rent a new warehouse in Bangkok Free Trade Zone and operate by its experienced team.
- Warrix has begun relocating some inventories to the new warehouse since Feb 2025. It realized 1.23MB as one-time exp in 1Q25 for warehouse relocation.
- At the present, The new warehouse is fully operated. As a result, Warrix has successfully commenced product deliveries to all channels since mid-April 2025.

Activity Roadmap 2025

	Q1			Q2			Q3			Q4		
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
FOOTBALL EVENT			**FIFA** 17-25 Mar			**FIFA** 2 - 10 Jun		**TNT new joursey**	**King's Cup** 1-9 Sep	**FIFA: Saudi** 9 / 14 Oct	**FIFA** 10-18 Nov	
		AFC: U20 Asian Cup 6-23 Feb	**FIFA: Saudi** 25 Mar	**AFC: U17 Asian Cup** 3-20 Apr		**FIFA: Saudi** 10 Jun			**AFC: U23 Asian Cup** 1-9 Sep		**FIFA: Saudi** 18 Nov	
								TL 25/26 Aug - May				
		FIFA Inter Women 17-26 Feb	**AFC: U20 Women** 8-16 Mar	**AFC: U17 Women** 26 Apr - 4 May				**AFC: U20 Women** 11-17 Aug	**AFC: U17 Women** TBC	**FIFA Inter Women** 20-29 Oct		
		75th TU-CU TRADITIONAL FOOTBALL MATCH 15 Feb	**FIFA: Inter Women** 31 Mar - 8 Apr								**31st JATURAMITR FOOTBALL FEST** 15-22 Nov	
			AFC: Beach Soccer TBC		**FIFA: Beach Soccer** 1 - 10 May							
RUNNING EVENT	**Run Hub Activities at QSNCC** Every Saturday											
	Trail Series 12 Jan					**Road Race** 1 Jun		**Tets-Special** TBC		**Trail Series** TBC	**Trail Series** TBC	**Trail Series** TBC
	Buriram Marathon 2025 25 Jan					**Trail Series** TBC	**Partner Activity** TBC					
OTHER SPORT EVENT	**AFC: Futsal Women** 11-19 Jan				**AFC: Futsal Women** 7 - 18 May					**AFC: Futsal** 15-26 Oct		**33rd SEA Games** 9-20 Dec
		FIBA: Asia Cup 20/23 Feb	**FIBA: Asia Cup** 24-30 Feb		**FIBA: Asia Cup** Big Matches: May / July / Aug							
			Table Tennis 23-31 Mar		**Table Tennis** 17-25 May		**Table Tennis** TBC				**Table Tennis** 14-23 Nov	
				SCAT 18-20 / 25-27 Apr	**SCAT** 2-4/16-18/23-25	**SCAT** 6-8/13-15/25-29	**SCAT** 5-6/11-13/26-27	**SCAT** 28 Jul - 3 Aug / 7-17	**SCAT** 5-6 / 21-28			
LIFESTYLE EVENT		**Branding / Lifestyle Campaign Launch** Product: Jeans / T-Shirt						**Branding / Lifestyle Campaign Launch** Product TBC				

2026 Sales Target



Q&A

For more information, please contact IR Department
ir@warrix.co.th or 094 310 7103

Disclaimer

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This presentation may include information which is forward-looking based on management's current views and assumption including, but not limited to, prevailing economic and market conditions. These statements involve known and unknown risks and uncertainties that could cause actual results, performance or events to differ from the results, performance or achievements expressed or implied by such forward-looking statements. Such statements are not, and should not be constructed as representation as to future performance of WARRIX. In particular, such targets should not be regarded as a forecast or projection of future performance of WARRIX. It should be noted that the actual performance of WARRIX may vary significantly from such targets.

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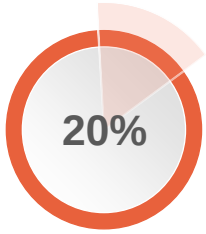
04

Appendix

Sport Apparel Industry Outlook

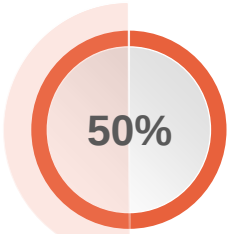
- The sport apparel goods market in Thailand is **worth approximately THB 30 billion.**
- **Recovered to pre-COVID-19 level, and on an uptrend with prospect to grow 15-20% per year** premised on increasing in health awareness as more people are committed to leading healthier and more active lifestyle.
- Along with huge opportunities from the resuming of large sports events including **FIFA World Cup in 2022, AFF Mitsubishi Electric Cup 2022, and the Olympics in 2024 etc.**
- **An ongoing rise in popularity of outdoor and home-based sports** (running, cycling, home exercise and yoga are becoming more popular).

The sport apparel goods market in Thailand



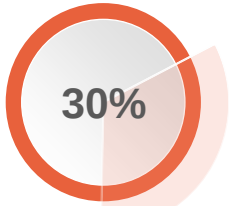
Discounted/Mass market

Import product by Thai company, no brand and cheap price



Middle market

Thai brand produce by Thai company



Global market

Global brand, both import and export

Top 5 most popular sports in Thailand

Football

Rattan Ball

Badminton

Volleyball

Futsal

Top 5 most popular exercise activities in Thailand

Walking

Running

Cycling

Aerobic

Fitness

~THB 30 billion
of sport apparel goods market in Thailand

42 %
of Thai population exercise regularly

>70%
of Thai people who exercise regularly are middle to high income

8 %
of Thai population playing sport regularly

Sources : Mckinsey sporting goods 2021-2022 report, Manager Daily news the mall group research 2018, Marketeer online

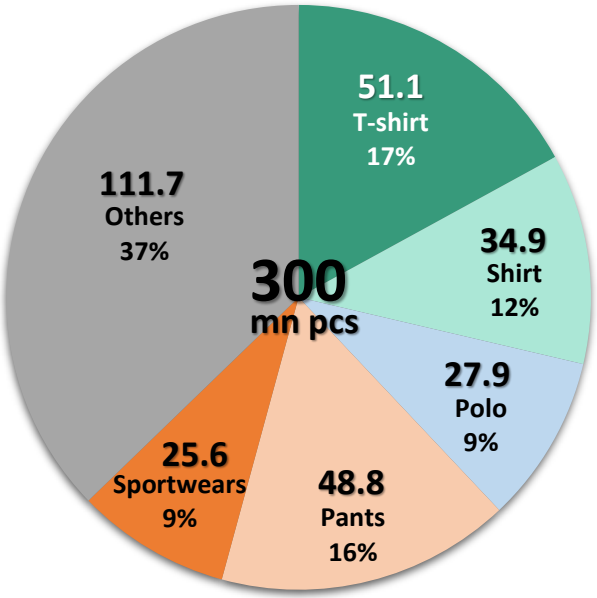
Thailand Annual Garment Consumption

Garment annual consumption

- According to a study by UTCC, Thailand 2020 annual garment consumption is estimated at 300mn pieces
- The estimated T-shirt consumption is ~51mn pieces annually, contributing ~17% of all garment consumption and slightly higher than annual pants consumption at ~49mn pieces

Fashion macro trend

- According to UN, number of garment purchased per capita between 2000 and 2014 increased by about 60 percent, while each item is kept for only half as long. Hence people wants to buy more and spend less per piece



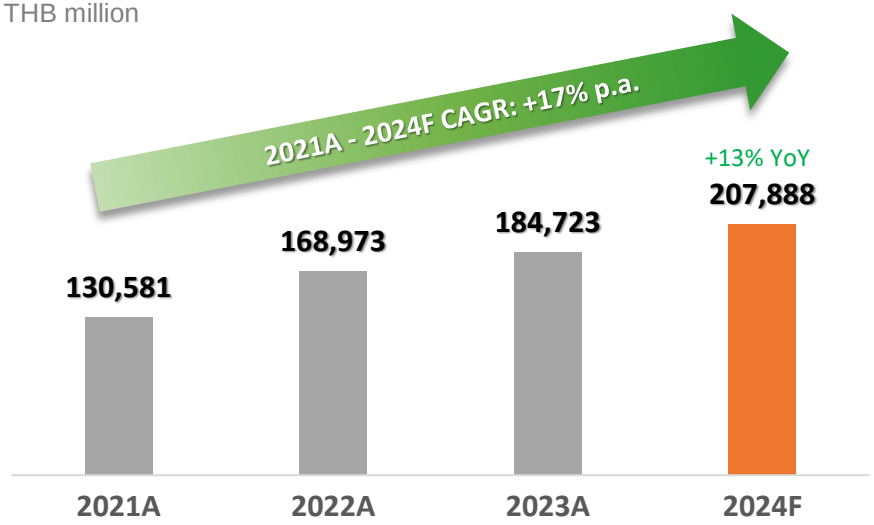
Thailand Annual Garment Consumption 2020 (mn pcs)

Sources : Mckinsey sporting goods 2021-2022 report, Manager Daily news the mall group research 2018, Marketeer online

Industry Outlook

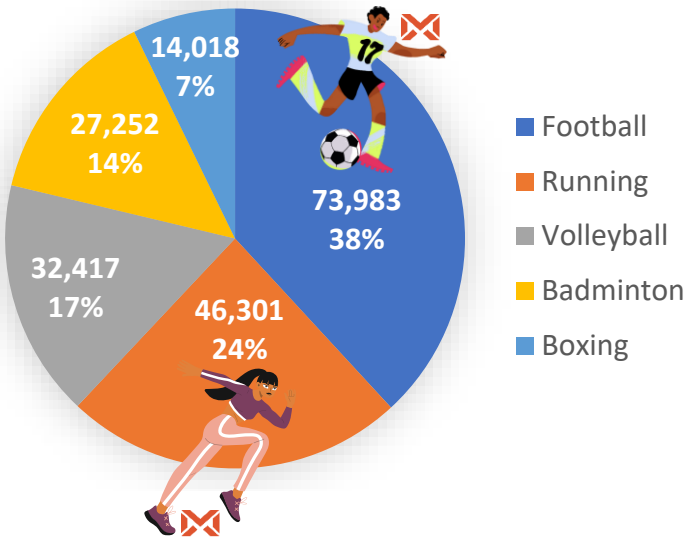
Thailand's Sports Industry

Unit: THB million



Top 5 Sports Contributing to the Industry in 2023

Unit: THB million



Sports-Related Expenditure per Person in 2023

Average

7,055 THB/person

Sports Shoes

2,093 THB/person

Food and Beverages
during watching, competing, playing sports

1,299 THB/person

Sportswear

948 THB/person

Sports Equipment

815 THB/person

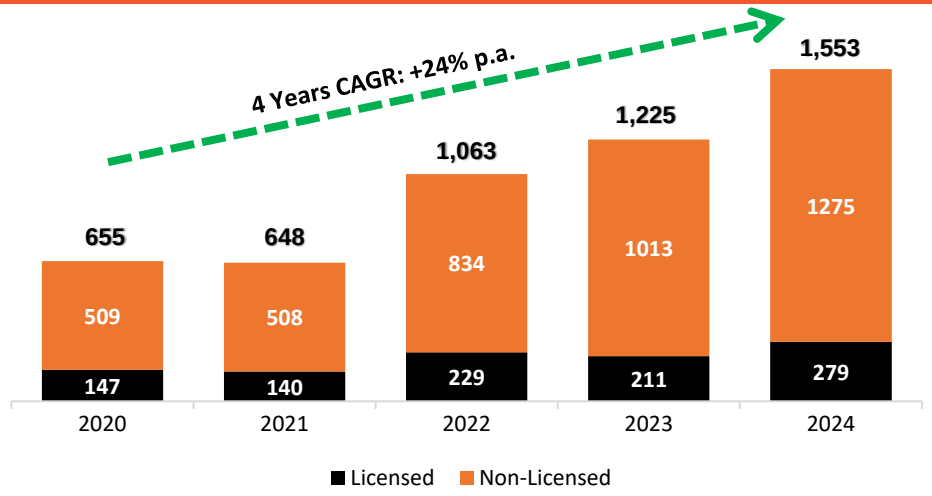
Tickets and Fees

391 THB/person

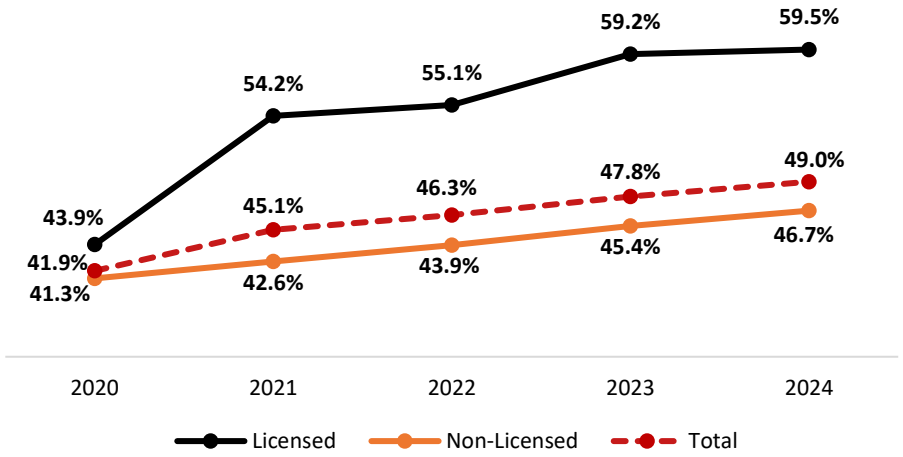
Source: Ministry of Tourism and Sports, Marketeer Online, 2023

Key Financial Performance

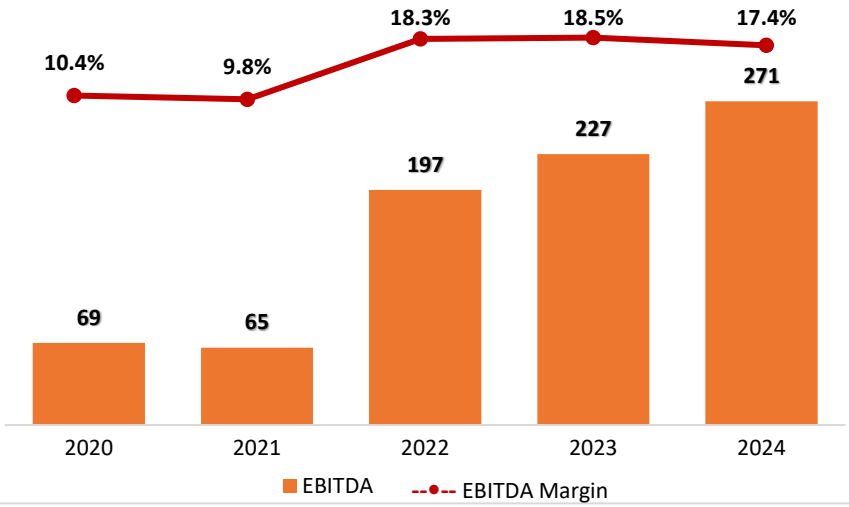
Revenues



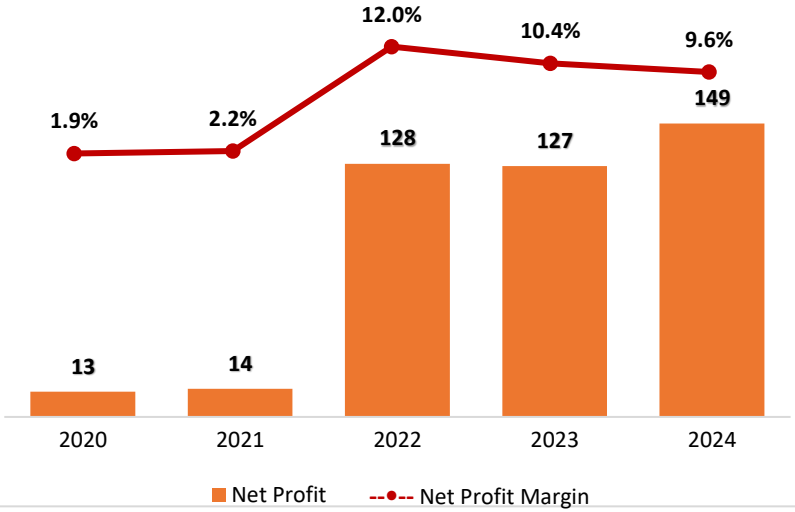
Gross Profit Margin



EBITDA



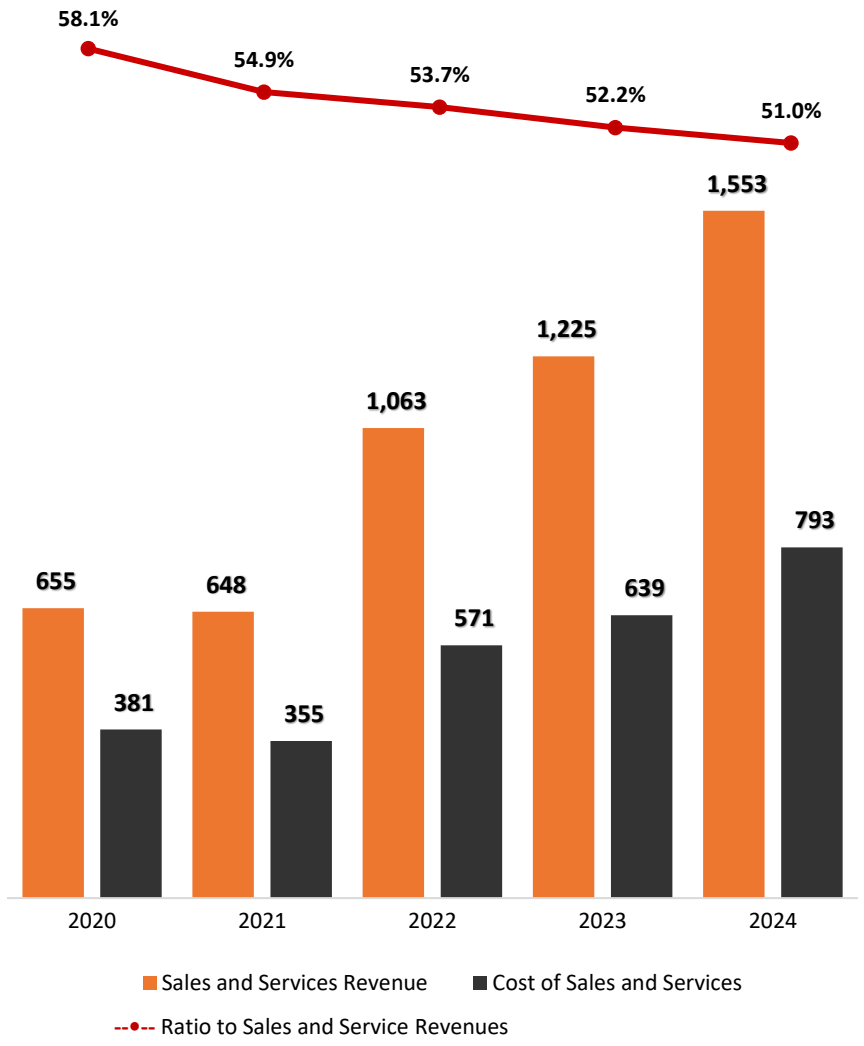
Net Profit



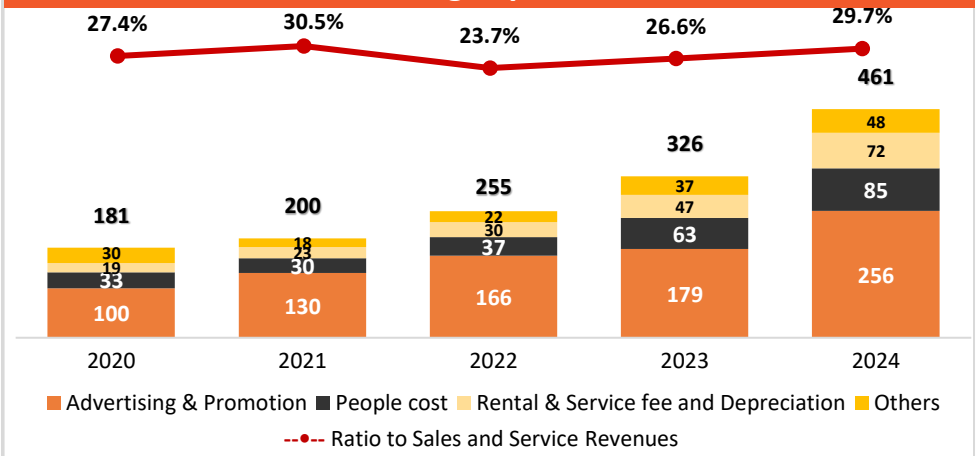
Unit: THB million

Key Financial Performance

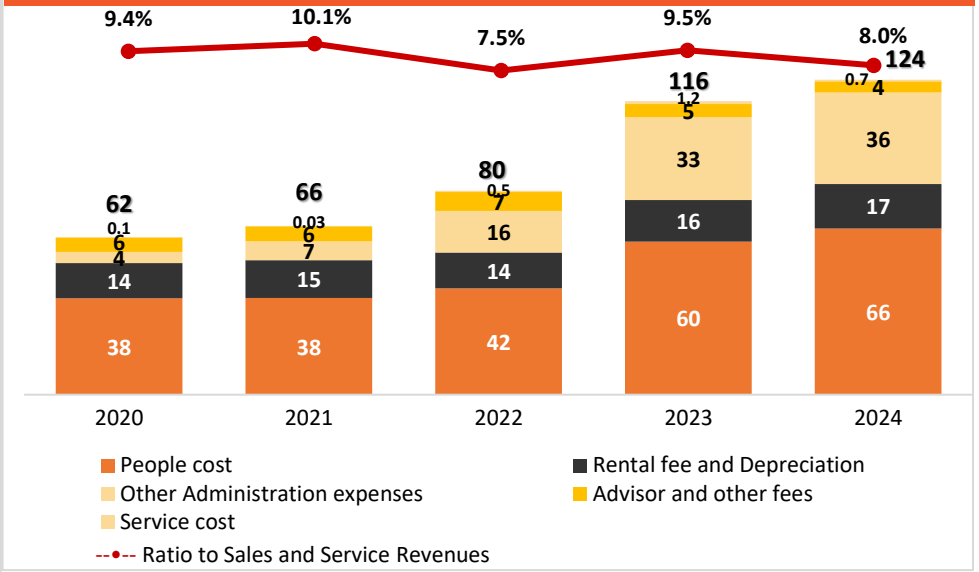
Cost of Sales and Services



Selling Expenses



Administration Expenses



Unit: THB million

Key Financial Performance

Unit : Million Baht	1Q23	2Q23	3Q23	4Q23	1Q24	2Q24	3Q24	4Q24
Total A/R	327.2	245.9	344.3	357.1	294.8	317.6	400.5	524.3
Total Inventory	558.8	540.3	555.2	529.9	545.5	543.3	559.7	576.9
Total A/P	270.2	144.1	180.0	202.4	173.1	189.0	211.2	210.5
Total Assets	1906.6	1658.9	1735.7	1799.7	1771.5	1729.3	1831.1	1883.4
Interest Bearing Debt	146.0	129.6	126.7	141.5	135.8	137.9	166.2	156.8
Total Liabilities	454.7	299.2	334.8	392.3	363.2	364.5	416.1	411.9
Total Equity	1451.9	1359.7	1400.9	1407.5	1408.3	1364.8	1415.0	1471.5
EBITDA	28.5	41.8	66.9	89.3	45.8	42.6	89.7	92.6
CPLTD	17.9	18.2	19.5	25.6	26.5	28.2	36.4	35.4

Current ratio (Times)	3.98	5.99	3.66	5.39	5.78	5.59	5.07	5.59
D/E (Times)	0.31	0.22	0.24	0.28	0.26	0.27	0.29	0.28
IBD/E (Times)	0.10	0.10	0.09	0.10	0.10	0.10	0.12	0.11
Inventory Turnover by days	335	378	301	243	299	262	235	231
AR Turnover by days	124	102	83	81	91	80	76	94
AP Turnover by days	199	143	89	86	104	87	85	86
Cash Cycle (days)	259	338	295	239	285	255	226	240

05

Business Overview

Establishment period | Transformation from sport apparel to active and lifestyle | Listed Co.,

Key Milestones

2013

WARRIX was founded

2014-2015

Starting local marketing strategy by supporting sportswear and athlete's clothing for 2 Thailand football clubs in League I and League II

2016

- Capital increase to 100 MB
- Win the rights to produce the Thai national football team sportswear products (2017-2020)

2017-2018

Win the rights to produce the Myanmar national football team sportswear products

2020

- Warrix Holding Pte. Ltd. was founded
- Opening 1st Physiotherapy & Performance Studio at Stadium One
- Official Match Ball and Kit Supplier for AFF Suzuki Cup 2020

2021

- Win the rights to produce Thai national football team sportswear (2021-2028)
- Win the rights to produce Thai national basketball team sportswear
- Warrix Sdn. Bhd. was founded as subsidiary of Warrix Holding Pte. Ltd.

2022

- Listed on the mai stock exchange
- Capital increase to 300 MB

2023

Acquired Fit Junction and Premier Football

2025

Established a subsidiary, KSL & WARRIX Co., Ltd.

Transforming to "Active & Lifestyle" business

WARRIX to become top of mind brand locally and globally

At the forefront of innovation & sustainability

Sales reaching THB 2.7 billion in 2026

Warrix at a glance

Innovation & Design

Unbreakable Jersey
Exclusive technology by WARRIX

COMBATECH
COMBATEC7 + AIRFLOW 360

COMBALITE
COMBALITE3 + VENTILATION

COMBA+ COOL
WARRIX T-SHIRT
COOL FROM WITHIN
UV PROTECT · QUICK DRY · ANTI-BAC

Strong Partnership

2 National Football team licenses

4 International licenses

>30 Clubs licenses

6 Educational licenses

6 Sponsorship licenses

Extensive Distribution Channel

4 Flagship Stores / Hub

13 Official Stores

200+ Traditional Trade

450+ Modern Trade

15,000+ CVS/24 Shopping

Wide-reaching E-commerce Platform

Data Driven with Marketing Technology

- Data Marketing Analytics
- Content Marketing
- Decentralized Advertising
- Programmatic Advertising
- Social Media Marketing
- Local Marketing

Warrix Key Product Portfolio

Expanding portfolio and products

Extendable business

Sportswear

Football

Running

Basketball

Golf

Table Tennis

Sport Equipment

Active & Lifestyle

Training

Footwear

Innerwear

Streetwear

Lifestyle

Health

RUN HUB

Physiotherapy & Performance Studio

Explorer

Trail / Marathon event

Running event

Music event

Food event

Camping

Web 3.0

Warrix Product Portfolio at a Glance

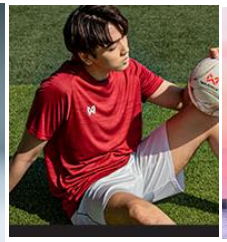
Non - Licensed products (81%)

Classic Product

Product with simple design, wear in classic and trendy ways for every occasion i.e. Polo T-shirt, short pants.

Collection Product

More variety, seasonal and fashionable products to meet all lifestyles and needs of customer, designed based on the periodic popularity, changing in fashion era/ season.



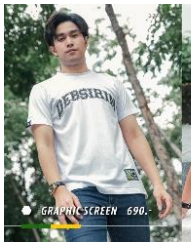
Made to Order and Sport Equipment Product

Customize design and origination of individual customer own product for various events i.e. sport events, organization, corporate.

Licensed products (18%)

National Team, Football Club, and Other Licensed

Warrix exclusive products with the official right to support the Thailand National Team, football club, and other licensed product for organization, education institutions for various activities.



Health business (1%)

Physiotherapy and Performance Studio & Warrix Run Hub

Providing advice and knowledge on physical and nutrition including professional trainers with modern medical equipment and specialized courses for athletes and the general public by professional and experience team.

As of 31 Dec 2024

Robust trajectory for growth in the enduring wave of healthier and fitter lifestyle

Warrix continuously expand the distribution channel to cover many areas in local and global. Currently, there are 5 mains channels, which consists of

16 Warrix Own Shop

- CHANGSUEK Flagship Store at Stadium One, 1,000 sq.m.
- Warrix Outlet Muang Thong Thani 1 & 2
- Warrix Shop BCC, 20 sq.m.
- Warrix Run Hub at QSNCC, 557 sq.m.
- Warrix Outlet at Stadium One
- Warrix Lifestyle at Siam Square, 300 sq.m.
- Warrix Shop at The Mall Bang Khae & Bang Kapi
- Warrix Shop at Terminal 21 Korat & Pattaya
- Warrix Shop at Future Park Rangsit
- Warrix Shop Market Village Suvarnabhumi
- Warrix Shop Robinson Buriram
- Warrix Shop Central Westgate
- Warrix Outlet Siam Premium Outlet

New in 2024

As of 31 Dec 2024

> 200 Traditional Trade

> 15,000 Modern Trade

~69 stores

~ 80 stores

~ 305 stores

>14,545 via 24shopping

2022 - 2028

Robust trajectory for growth in the enduring wave of healthier and fitter lifestyle

E-Commerce /1

Website: www.WARRIX.co.th
>300,000 members

Facebook: WARRIX
>800,000 followers

Lazada: WARRIX
>275,000 followers

Shopee: WARRIX
>1,000,000 followers

Instagram: warrix_official
>78,500 followers

Line: WARRIX
>100,000 followers

Tiktok: warrixthailand
>91,000 followers

Project Base

Robust trajectory for growth in the enduring wave of healthier and fitter lifestyle

- Continue development in other businesses related to health and lifestyle.
- One stop service for supporting related sport event and to be a leader in sport-health and lifestyle business.

Warrix's active health businesses :

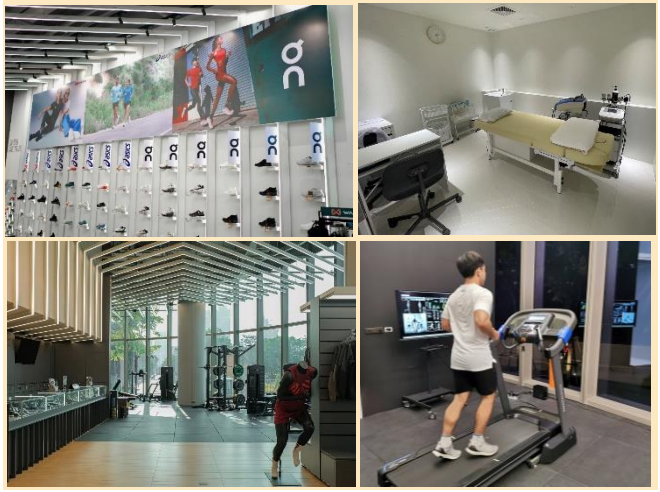
1. Physiotherapy Clinic & Performance Studio located at Stadium One, Samyan

- Providing physiotherapy treatment & rehabilitation, pre-post ACL operation, weight control, height increase, advice and knowledge on nutrition, including professional trainers with modern medical equipment.
- Sport specialized courses for football, marathon, golf, cycling and office syndrome such as physical analysis, sport massage and performance training for athletes and general public.

2. Warrix Run Hub located at QSNCC

- Warrix Run Hub provides full facilities for athletes, general public and runners in Benjakitti Park.
- Including 3 main facilities:

1) Performance Training: Motion Metrix Analysis and Exercise & Training Workshop.
2) Flagship store for running products: running/training shirts, running shoes (Warrix, On, Asics), running gadgets and equipment.
3) Physiotherapy clinic.



3. Fit Junction

- Multi-funnels fitness and nutrition educator: Online Courses, E-book, Workshop, 1 on 1 Training.
- More than 2M of total followers and subscribers from all social media platforms.
- Using 10 years worth of R&D, SOP, customer base and data from FJ to build strong foundation and boost exponential growth for Warrix Health.