

*Exceeding
expectations*

INOX
LIVE *the* MOVIE

**Investor
Presentation
July 2019**

INSIGNIA

IMAX

LASER

CLUB

Kidz

Onyx Diner

MX4D

BIGPIX

This presentation and the following discussion may contain “forward looking statements” by Inox Leisure Limited (“ILL” or “the Company”) that are not historical in nature. These forward looking statements, which may include statements relating to future state of affairs, results of operations, financial condition, business prospects, plans and objectives, are based on the current beliefs, assumptions, expectations, estimates, and projections of the management of ILL about the business, industry and markets in which ILL operates.

These statements are not guarantees of future performance, and are subject to known and unknown risks, uncertainties, and other factors, some of which are beyond ILL’s control and difficult to predict, that could cause actual results, performance or achievements to differ materially from those in the forward looking statements.

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Due to rounding-off, figures presented throughout this document may not add up precisely to the totals provided and percentages may not precisely reflect the rounded-off figures.

FY15 financial figures are as per IGAAP and for FY16 and thereafter are as per IND-AS. Revenues for FY15 are shown net of entertainment tax, to be consistent with the revenues under IND-AS for FY16 onwards

INOX
INSIGNIA

Cafe
UNWIND

DISCUSSION SUMMARY

- INDUSTRY OVERVIEW
- COMPANY OVERVIEW
- COMPETITIVE ADVANTAGE & OUTLOOK
- ANNEXURE

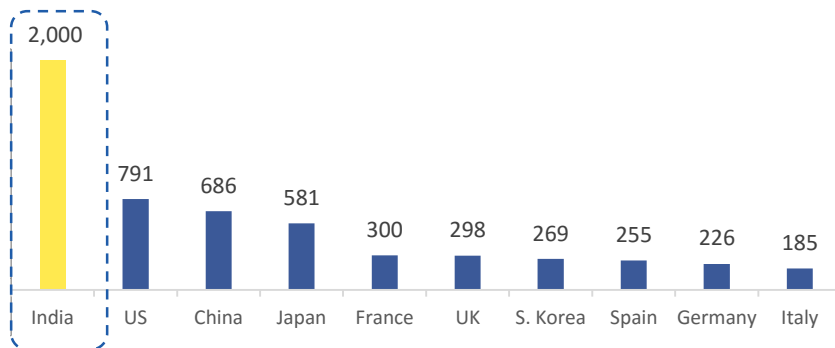
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INDUSTRY OVERVIEW

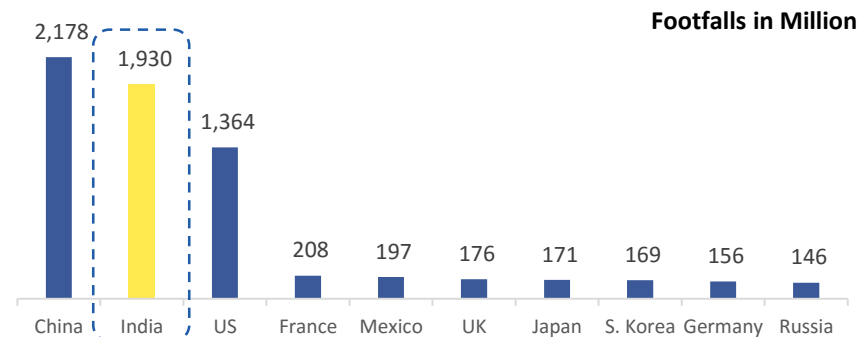
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Strong Fundamentals & Huge Growth Potential

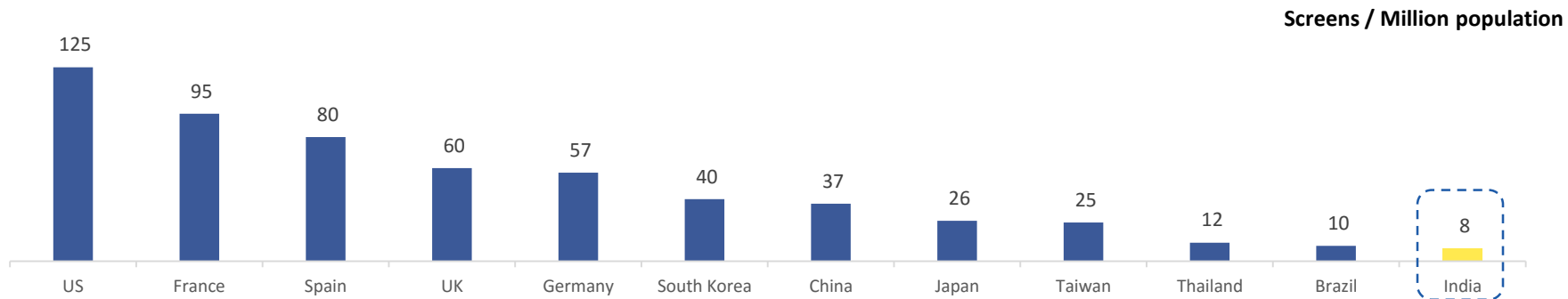
Highest Number of Film Produced in the World



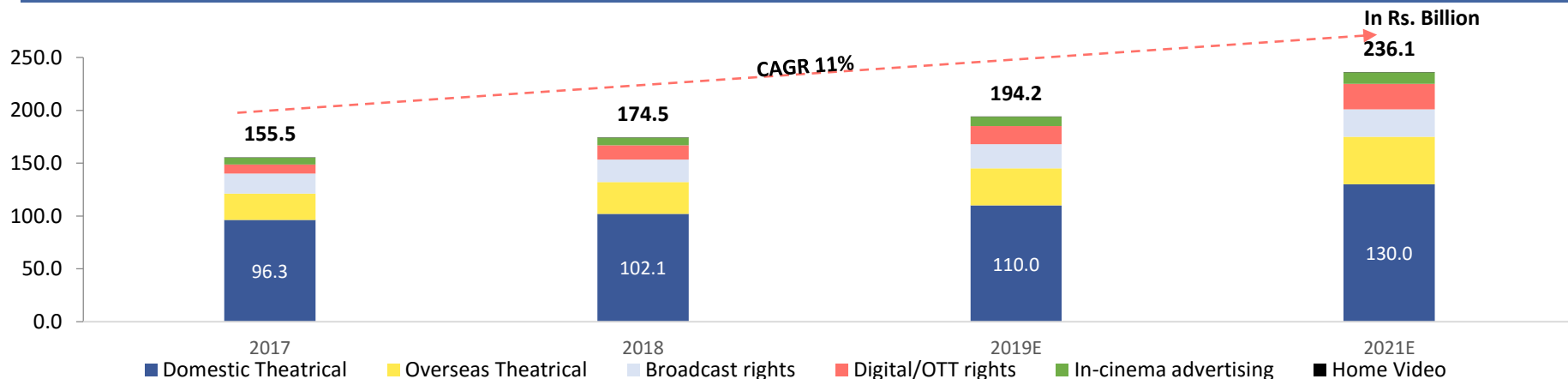
2nd Highest Number Of Theatre Footfalls in the World



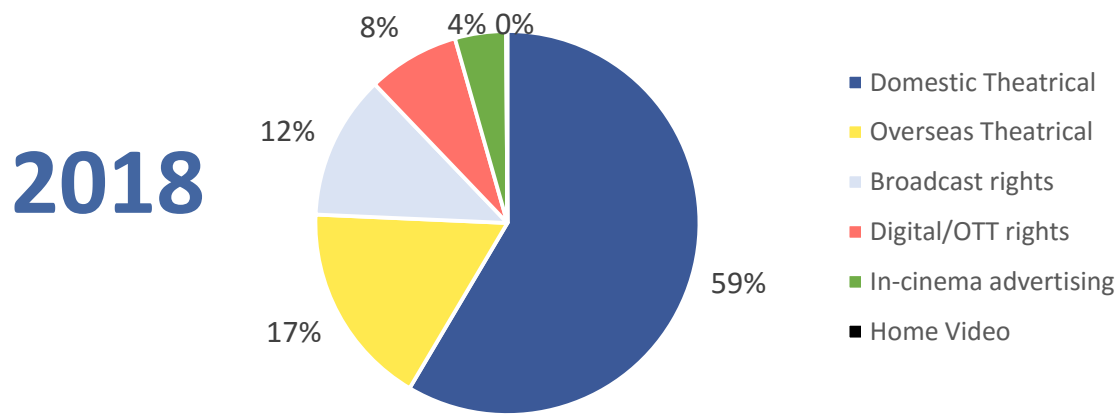
However, India's Screen Density is One of the Lowest

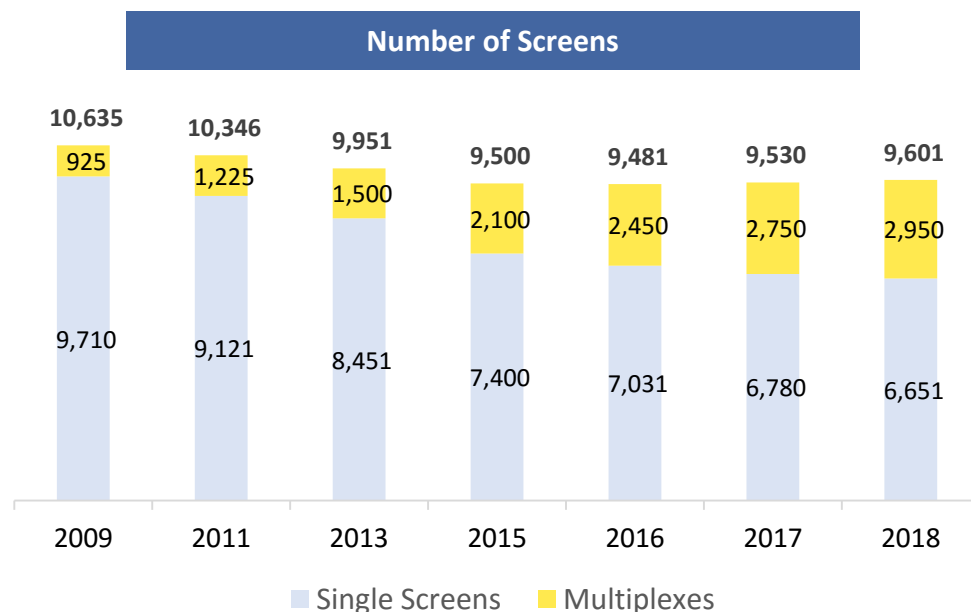


Indian Film Industry Displays Steady Performance Trends



Domestic Theatricals Constitutes 59% Of Total Film Industry





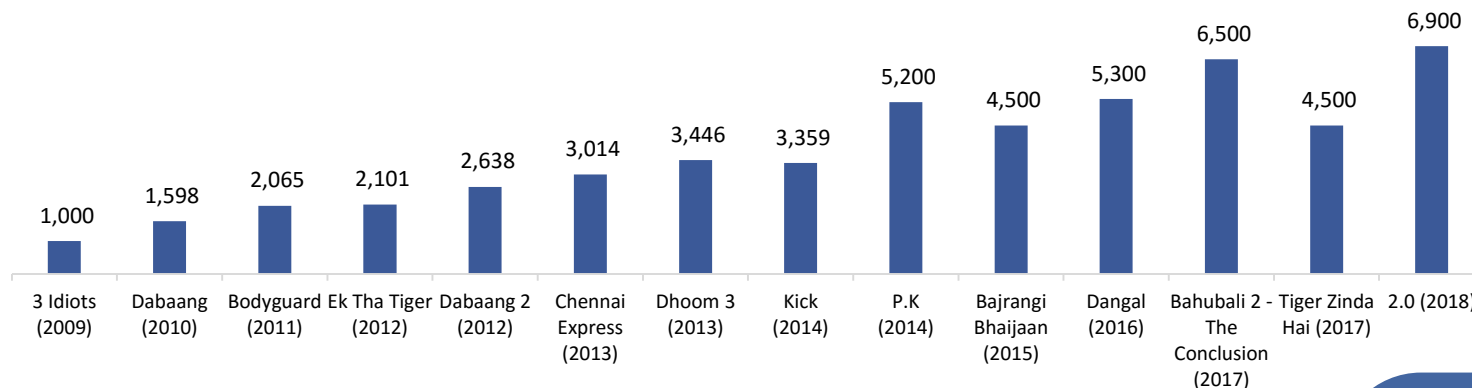
Multiplexes currently account for ~ 31% market share of the screens, however they account for ~55% of box office collections

FACTORS DRIVING GROWTH IN MULTIPLEXES:

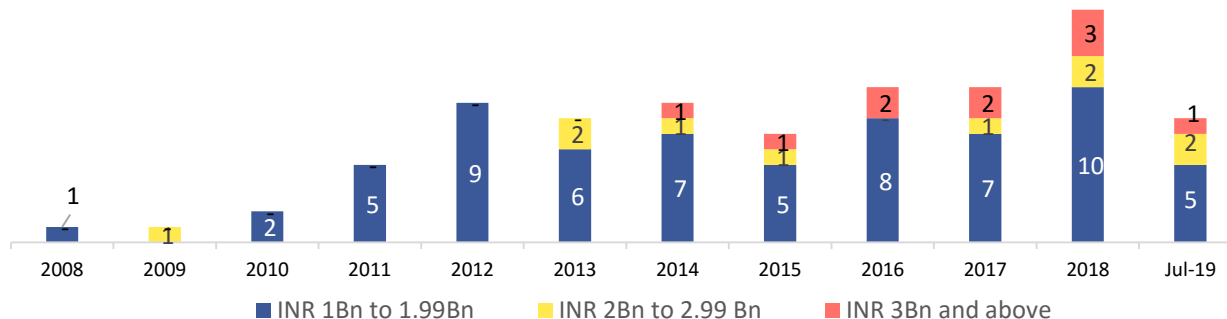
- Strong demographics, rising disposable incomes and discretionary spends.
- Superior location, destination and parking facilities.
- Multiple screens in one location offer a wider variety of content to the patrons.
- Different screen sizes provide programming flexibility. This results in higher occupancy ratios.
- State of art equipment (high quality video and audio), superior interiors, ambience and service.

Increasing Number Of INR 1bn + Movies

Wider Screen Releases

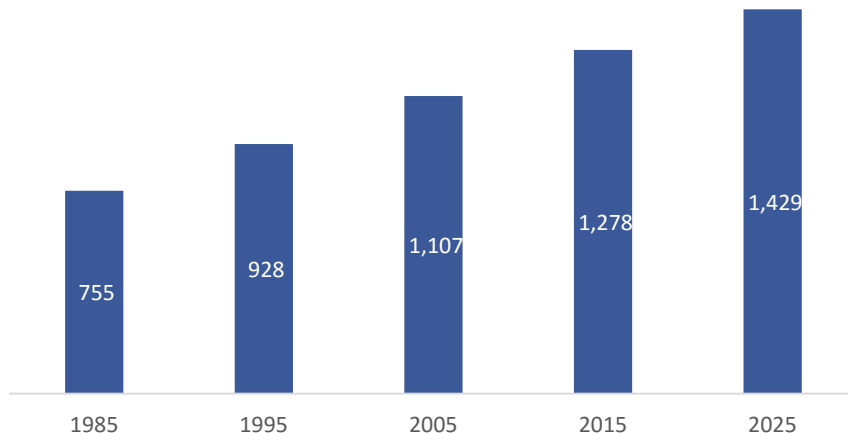


Higher Number Of INR 1 Bn + Movies

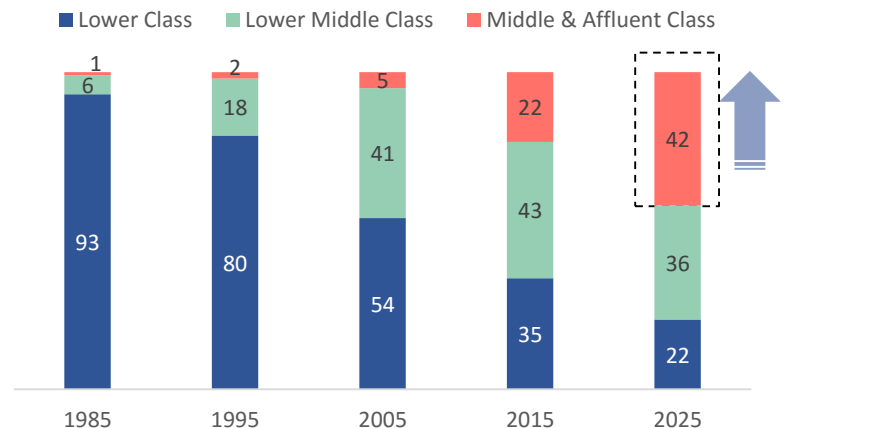


INCREASING NUMBER OF MOVIES ARE GENERATING MORE THAN RS 1 BN IN NET BOX OFFICE COLLECTIONS DRIVEN BY WIDER SCREEN RELEASES AND FACILITATED BY DIGITISATION OF CONTENT DELIVERY

Population of India (Million)

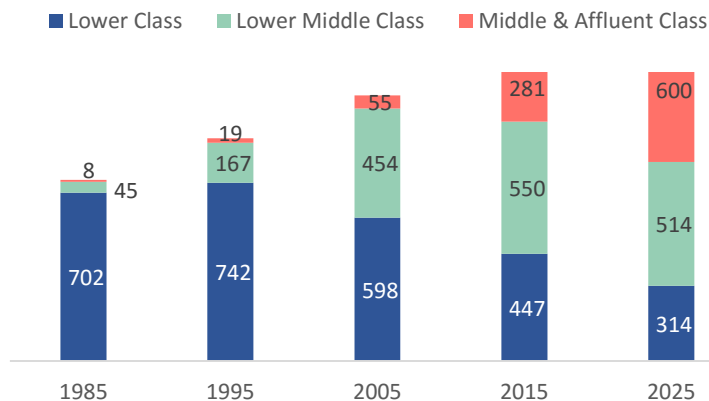


%Share of Population by Income Bracket

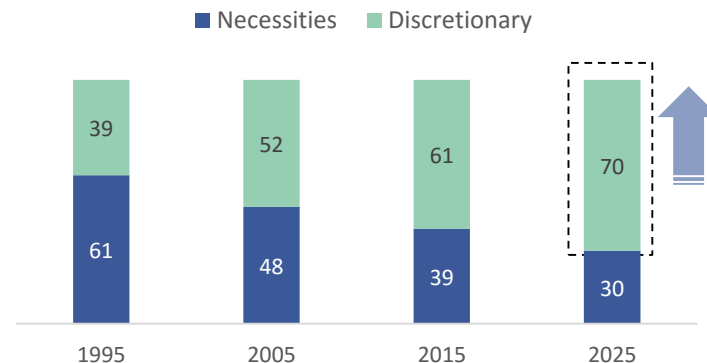


Based on Annual Household Income: Lower Class: < Rs.90,000, Lower Middle Class: Rs.90,000 to Rs.199,999, Middle & Affluent Class: > Rs.200,000

Share of Population by Income Bracket (Million)



%Share of Average Annual Household Consumption

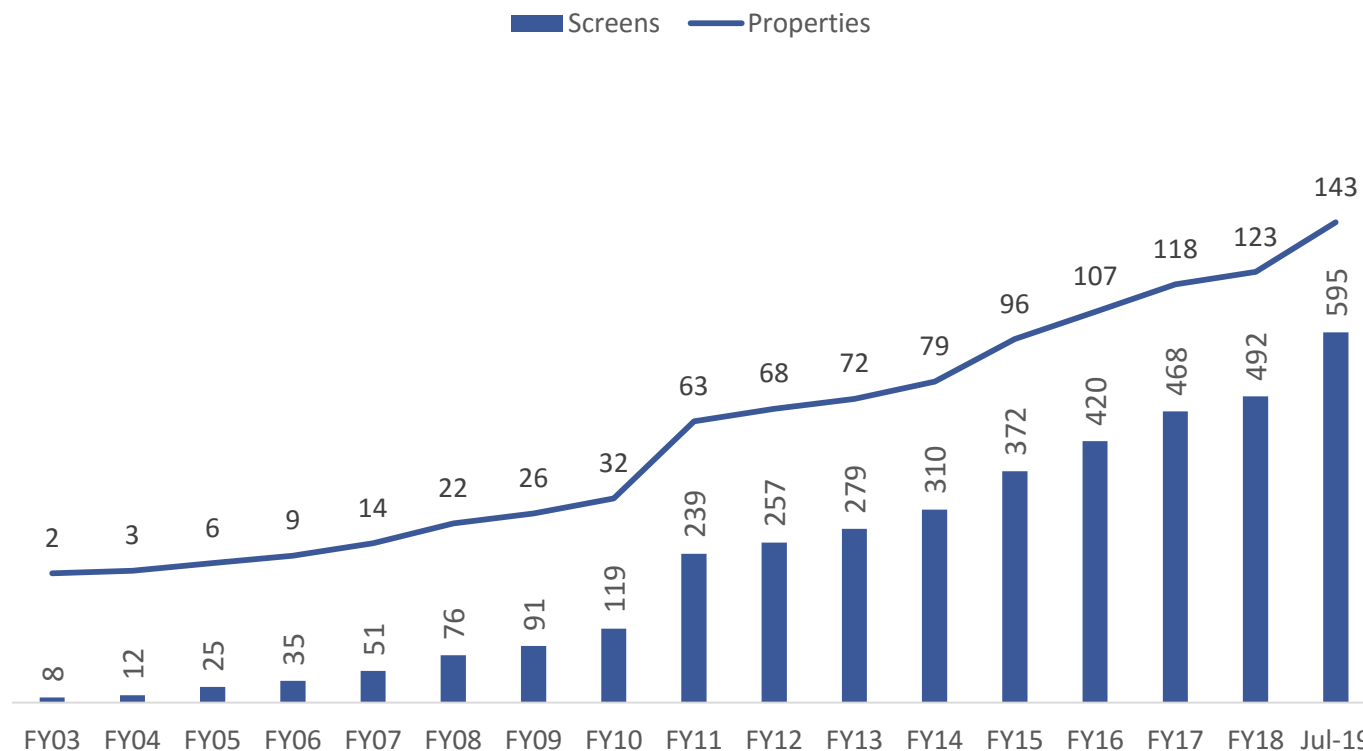




Company Overview

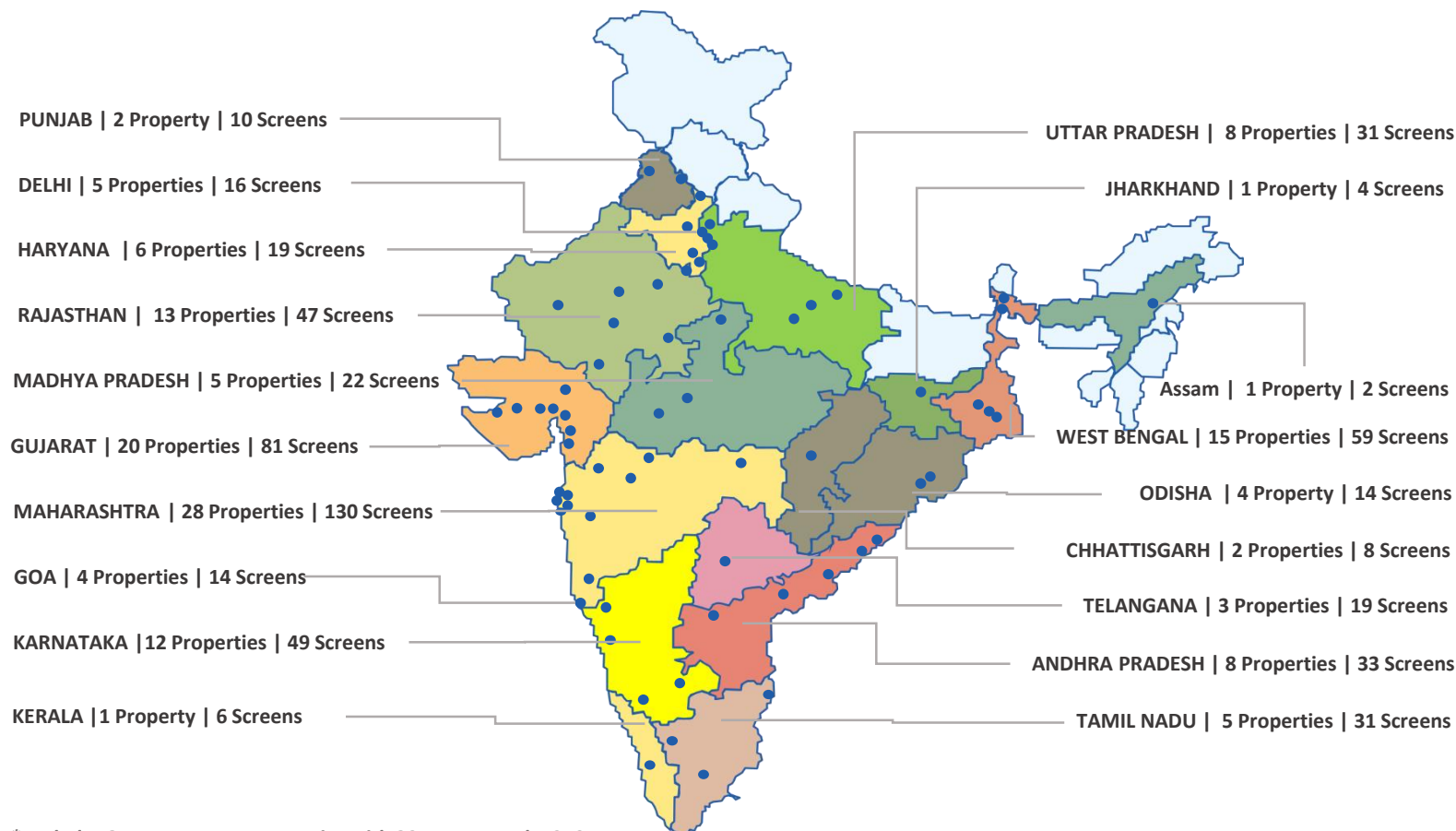
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Track Record of Aggressive Expansion



Note: Includes Acquisition of 89 Cinemas in FY07, Fame in FY11 and Satyam in FY15

ONE OF THE LARGEST MULTIPLEX CHAIN OPERATOR IN INDIA



19
States

67
Cities

143
Properties

595
Screens

139,797
Seats

* Includes 8 management properties with 29 screens and 7,370 seats

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INSIGNIA – LUXURY MOVIE WATCHING EXPERIENCE



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INOX Marina Mall, Chennai

INOX
INOX



Highest Ever New
Screen Openings for
the Industry in a Year

85 Screens

Highest Ad Revenue
Growth Rate in the
Industry for

**8 consecutive
quarters**

Breaking
**INDUSTRY
RECORDS**

Setting New Benchmarks

First National Chain
in the Industry to be

Net Debt Free

Highest “EBITDA to
Capital Invested” Ratio
in the Industry for FY19

22%

MILESTONES FY19

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*Exceeding
expectations*

HIGHEST YEARLY
FOOTFALLS

6.25Crs

HIGHEST YEARLY
ATP

Rs.197

HIGHEST YEARLY
SPH

Rs.74

HIGHEST YEARLY
REVENUE

Rs.1,692Crs

HIGHEST YEARLY
EBITDA

Rs.309Crs

HIGHEST YEARLY
PAT

Rs.133Crs



MOST AWARDED MULTIPLEX OF THE YEAR

INOX LEISURE
**ET BEST
BRANDS**
2018-19

**POPULAR
MULTIPLEX
TIMES RETAIL
ICON AWARDS**
2018-19

**MULTIPLEX
CHAIN OF THE YEAR
AT IMAX BIG
CINE AWARDS**
2018

**MOST ADMIRER
MULTIPLEX OF THE
YEAR AT ET NOW
GLOBAL AWARDS
FOR RETAIL
EXCELLENCE**

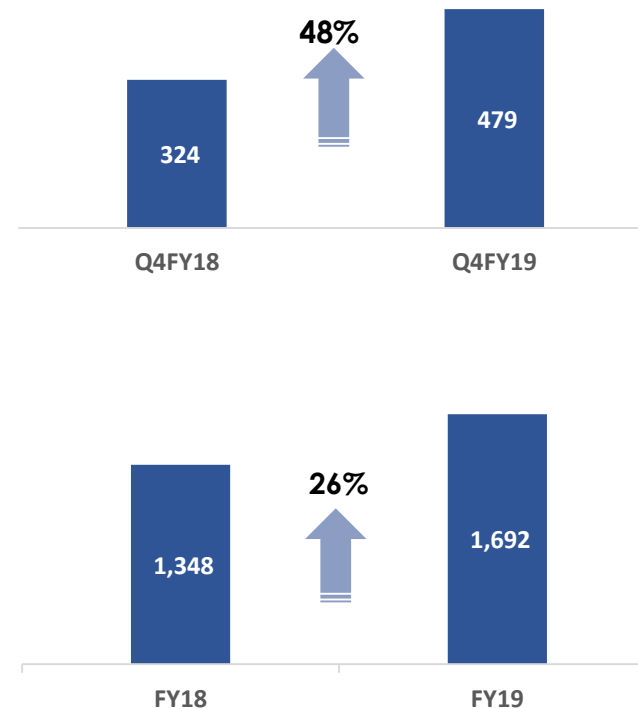
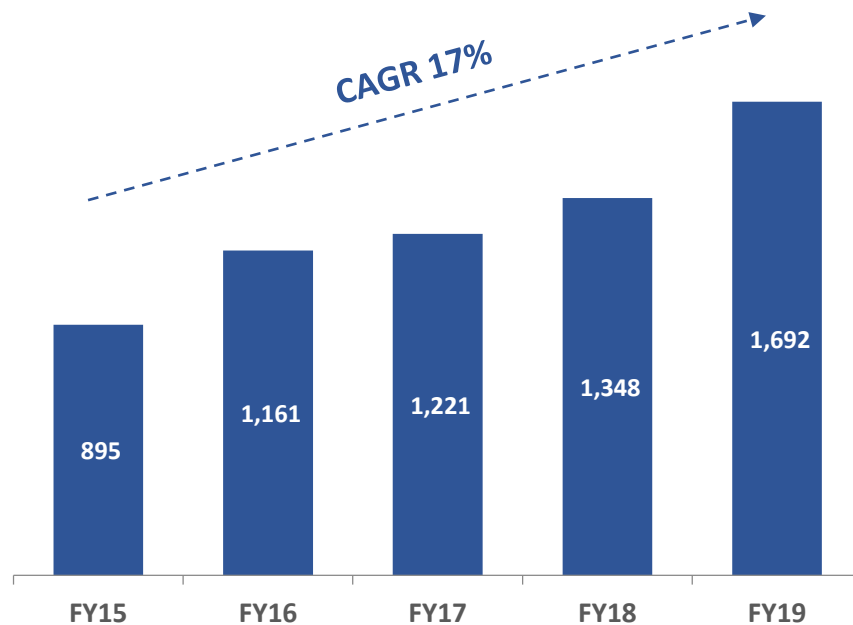
**BEST
TECHNOLOGY
OF THE YEAR
IMAX BIG CINE
AWARDS**
2018

**BEST
MARKETED
BRAND
KOTLER AWARD
OF EXCELLENCE**
2018-19

**HIGHEST LUXURY
STANDARDS
AT INTERNATIONAL
FILM BUSINESS
AWARDS 2018**

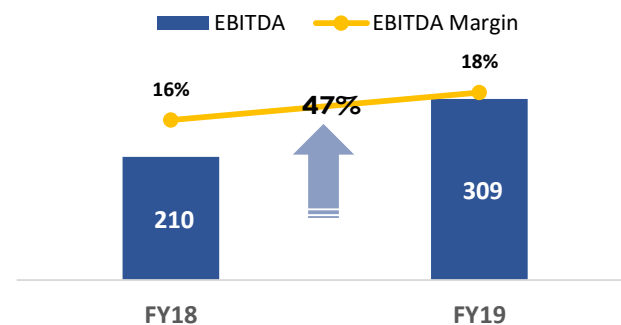
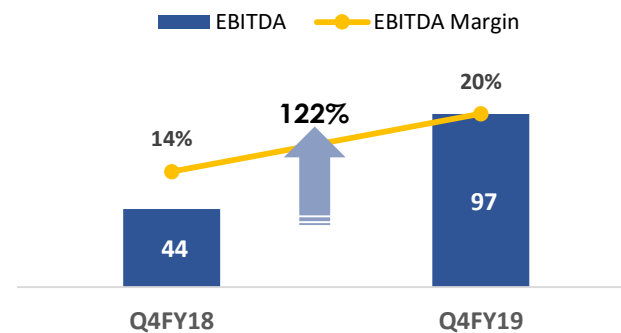
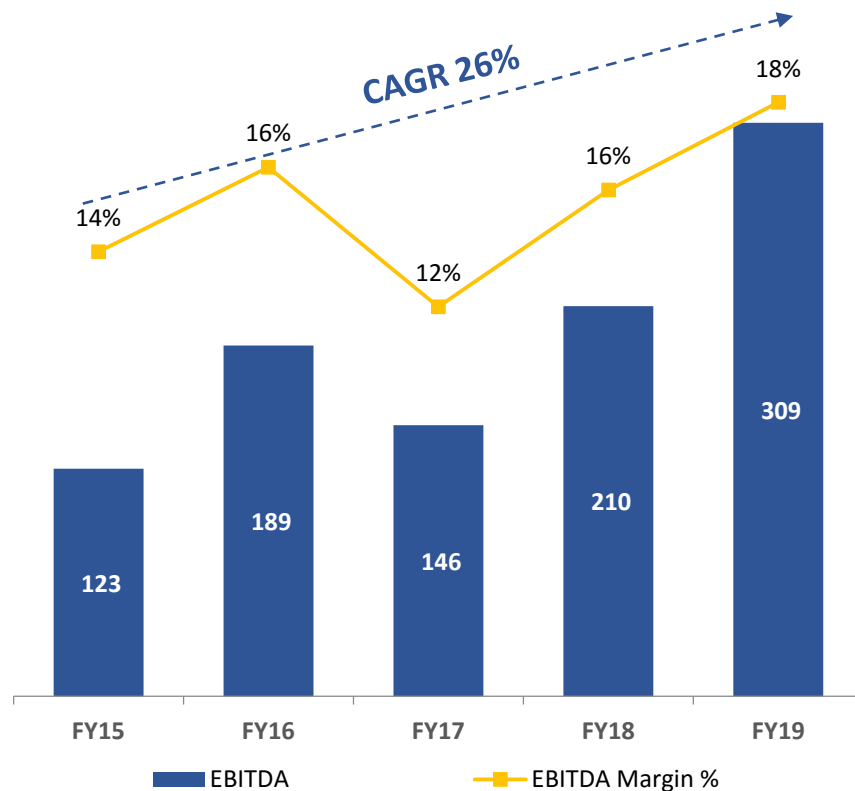
**BEST EMPLOYER
OF THE YEAR
AT EMPLOYER
BRANDING
AWARDS**
2018-19

Revenue from Operations



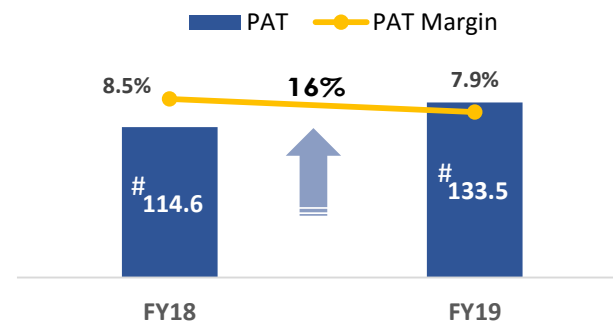
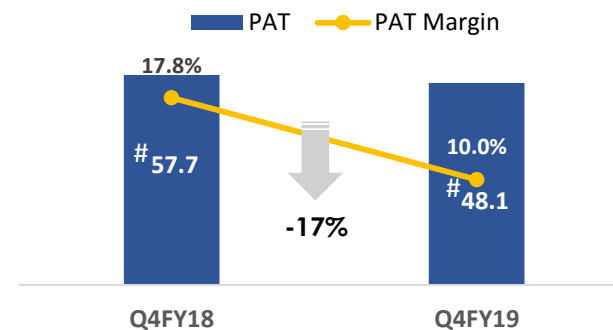
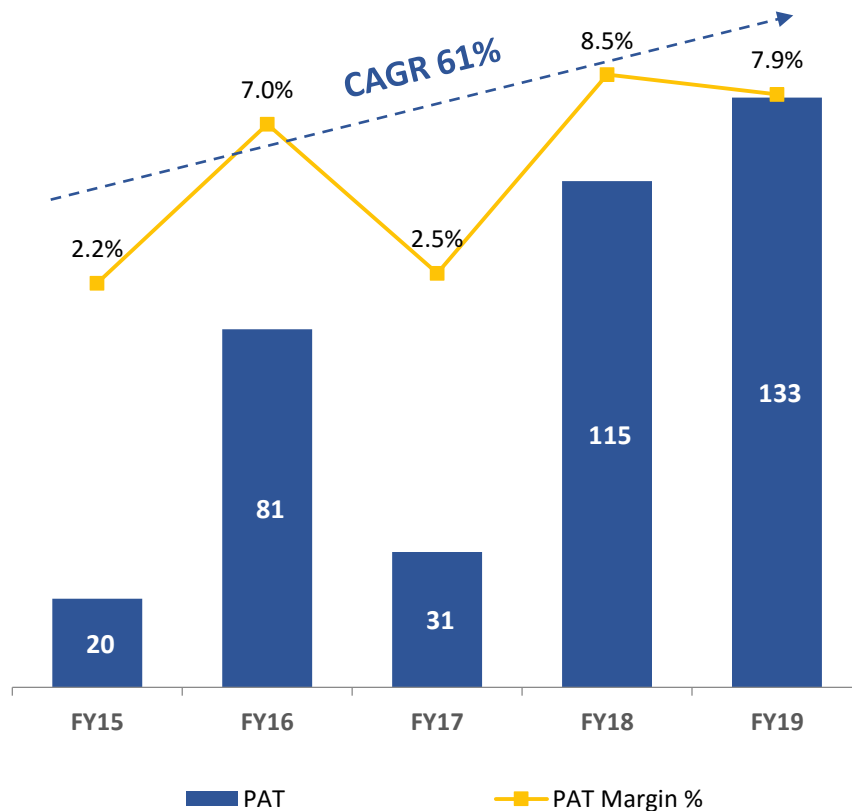
All figures in INR Crs., unless specified

Earnings Before Interest, Tax, Depreciation and Amortization [EBITDA]



All figures in INR Crs., unless specified
Note: EBITDA excludes Other Income (non-operating)

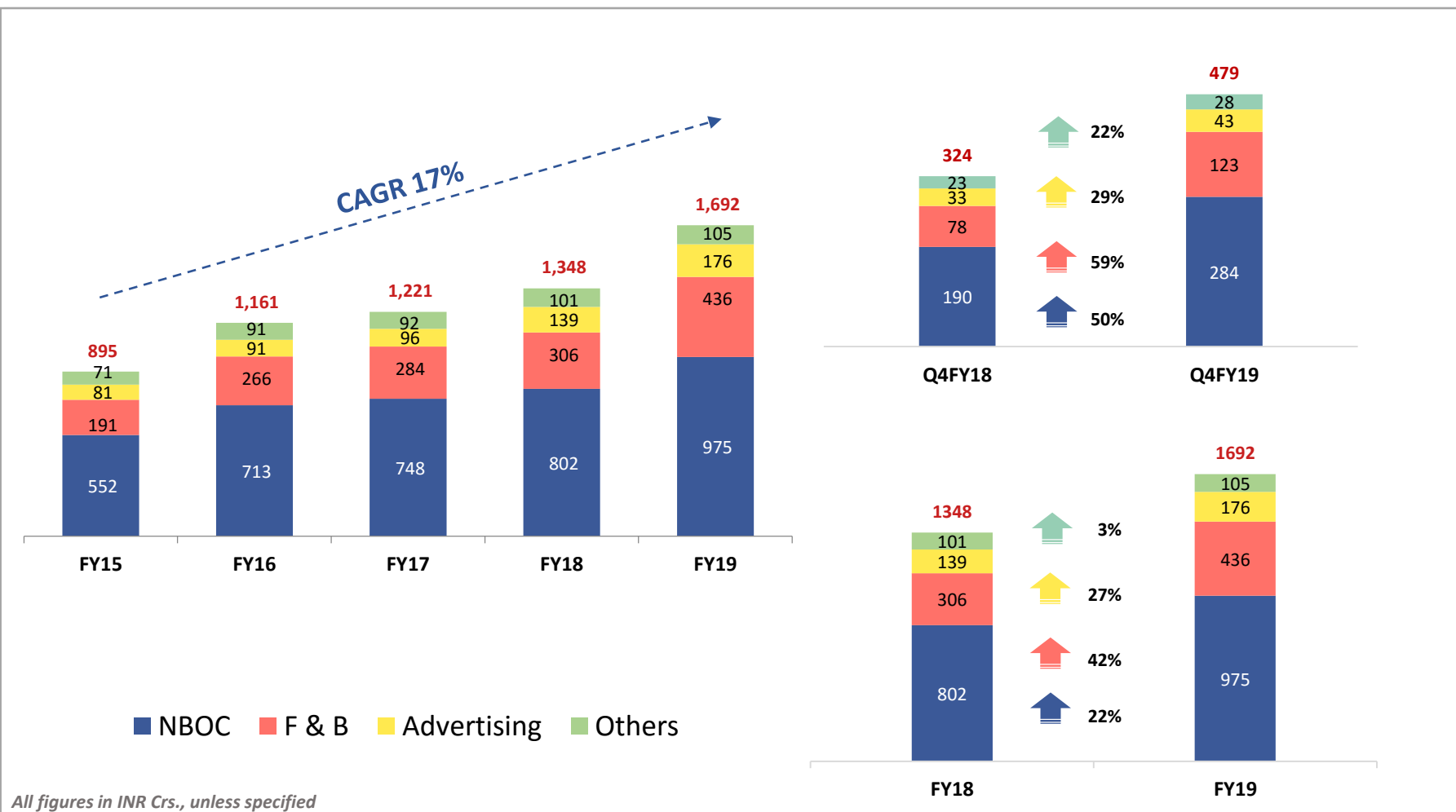
Profit after tax [PAT]



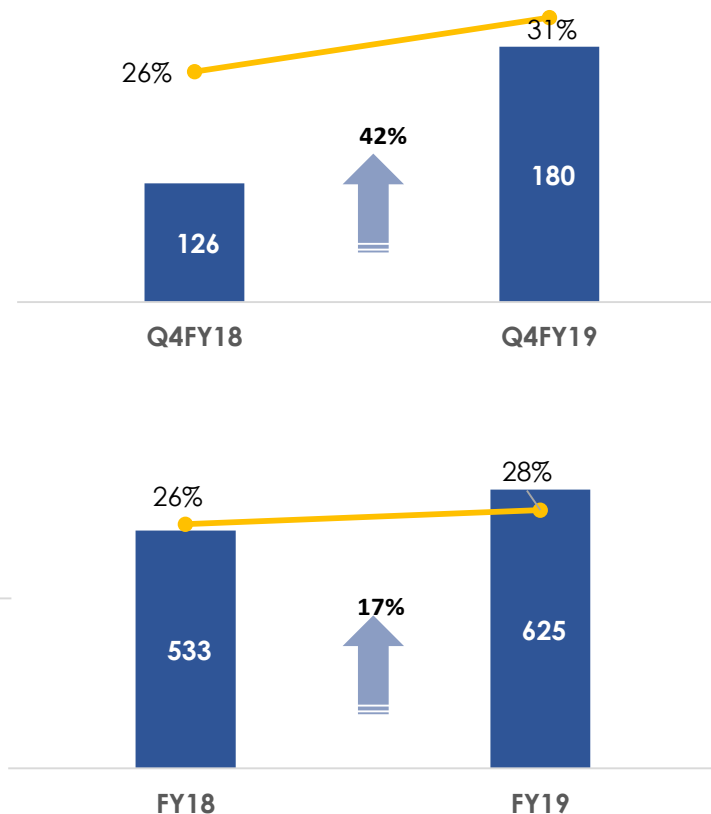
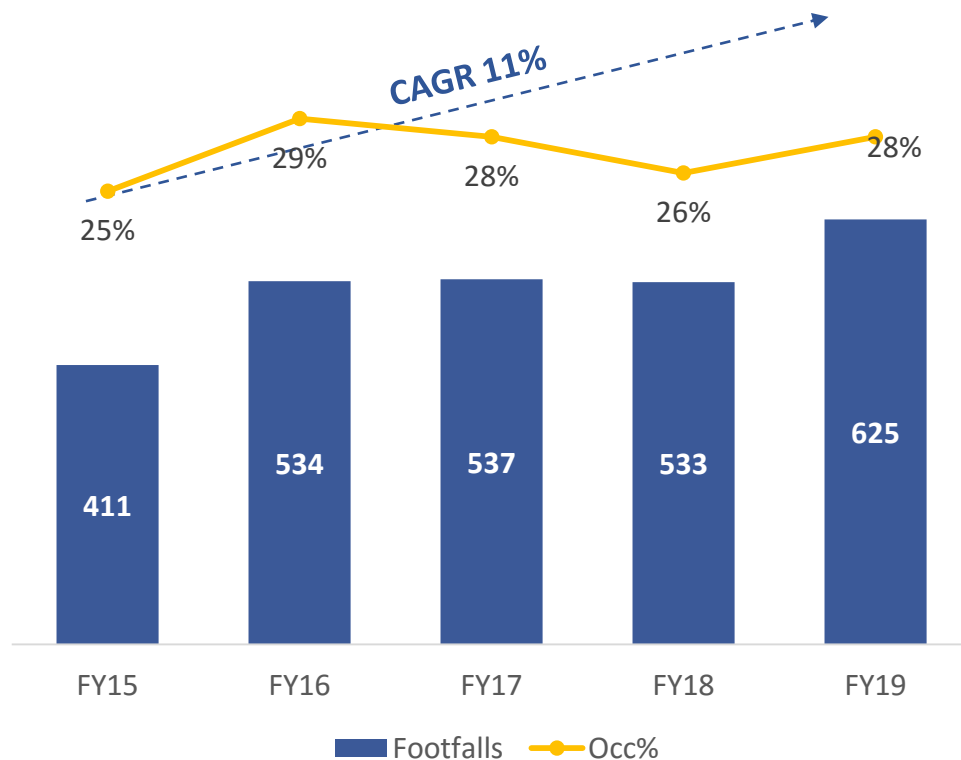
All figures in INR Crs., unless specified

Includes tax write back of Rs.54crs (FY18) and Rs.5crs (FY19)

Revenues - Segment Breakup

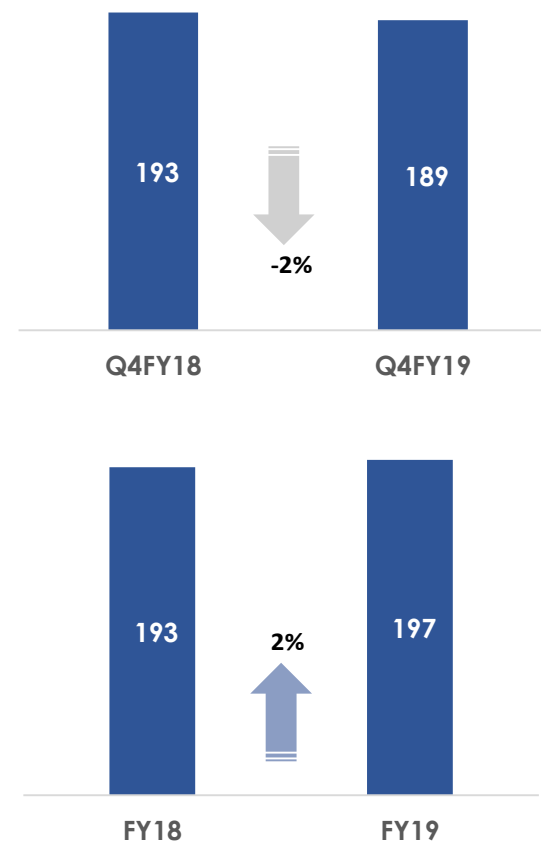
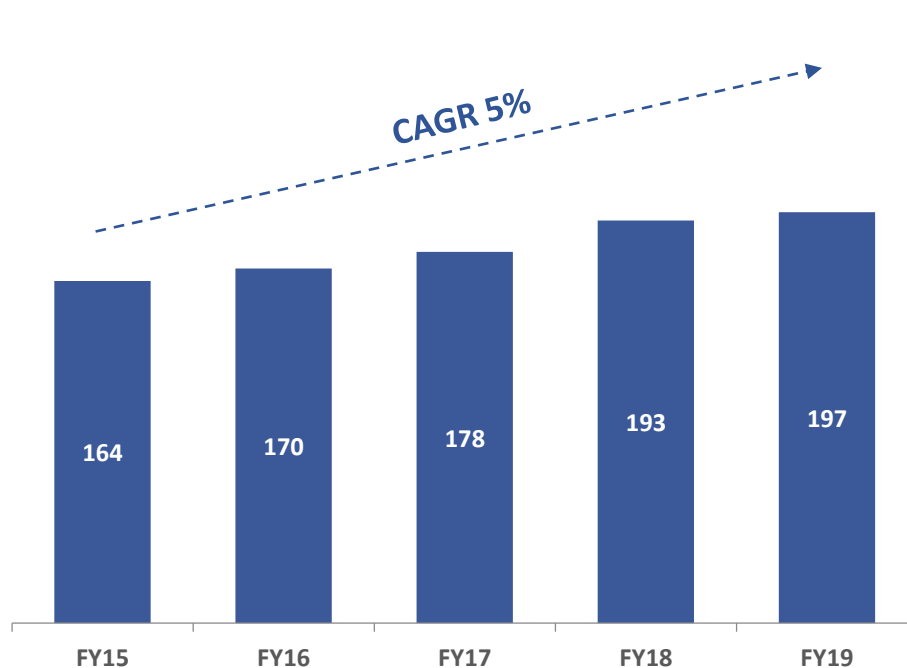


Footfalls and Occupancy Rate



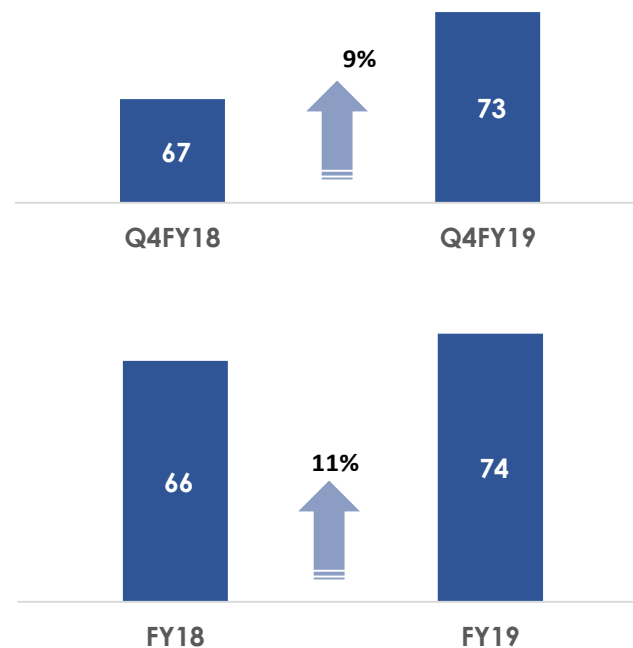
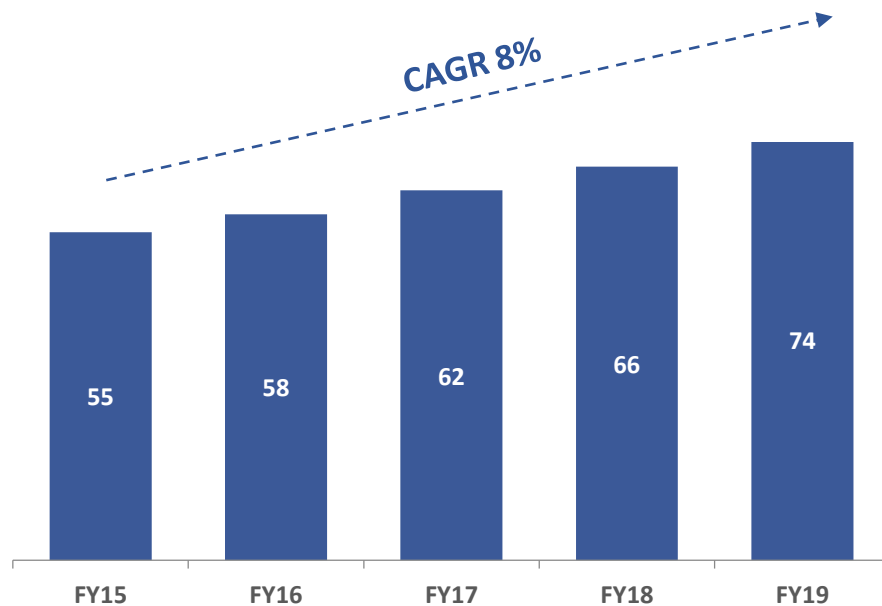
All figures in Lakhs, unless specified

Average Ticket Price [ATP]

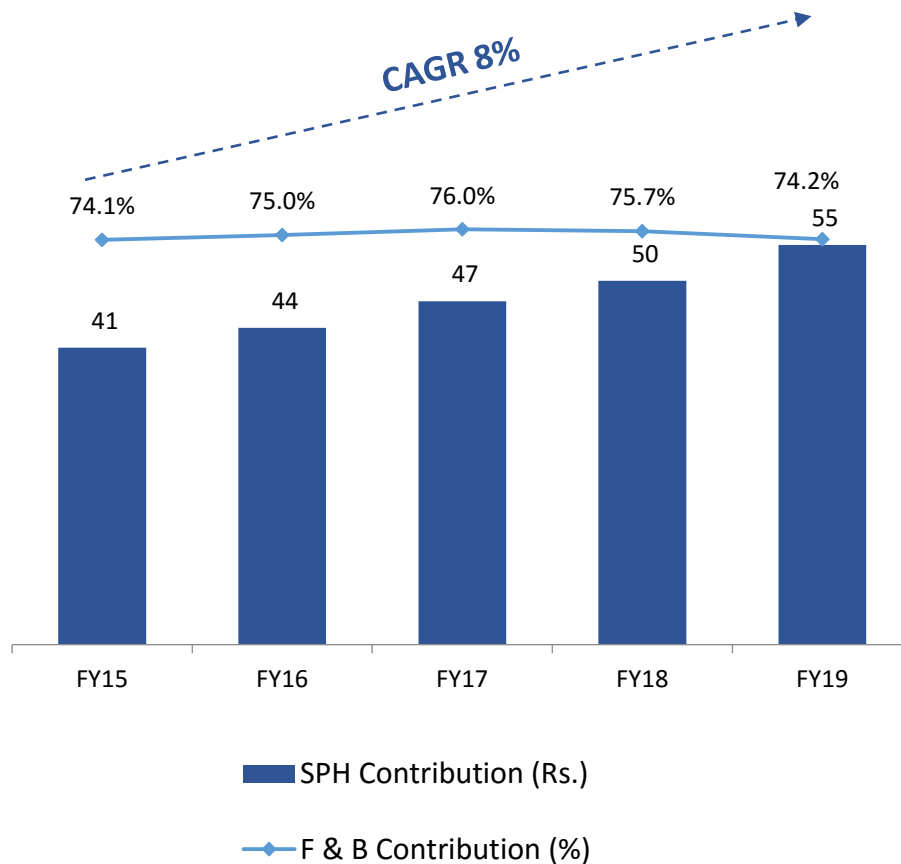


* W.e.f 1st Jan 2019, GST rate on tickets is reduced from 28%/18% to 18%/12%, thereby affecting the YoY ATP growth.

Spend Per Head [SPH]

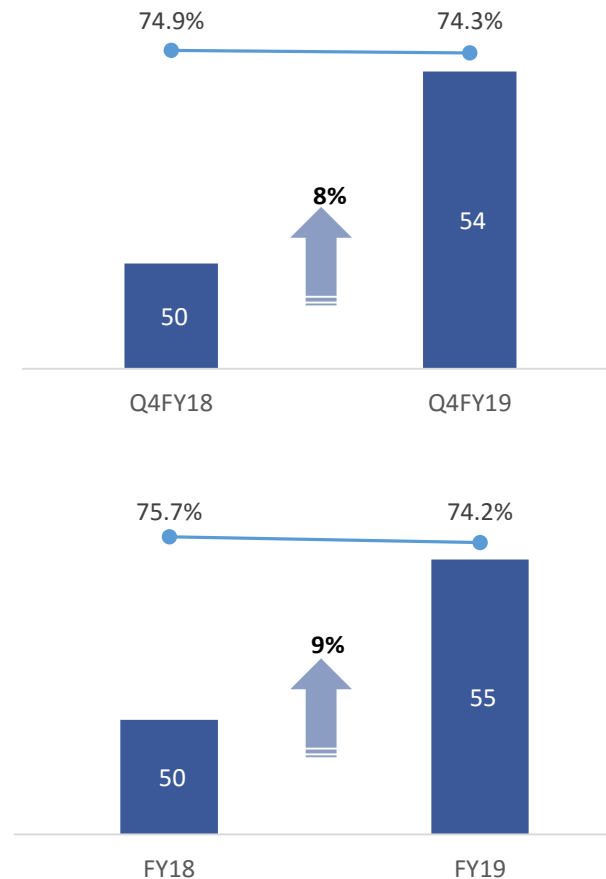


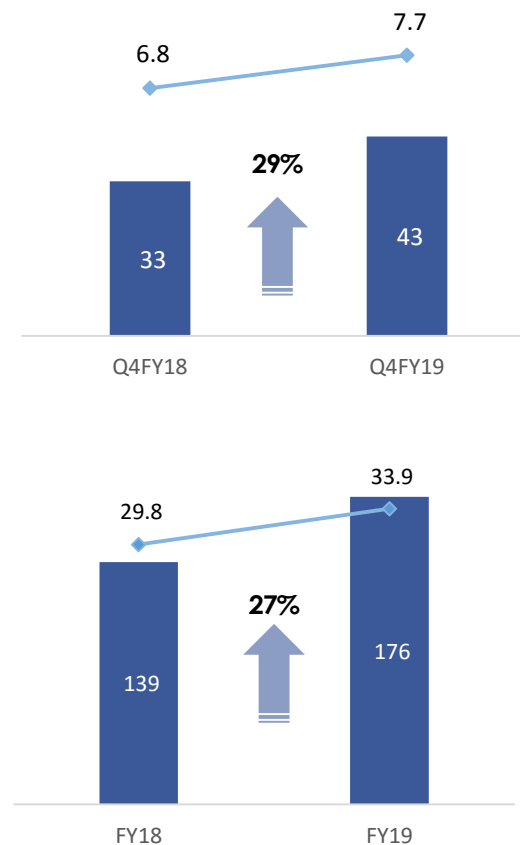
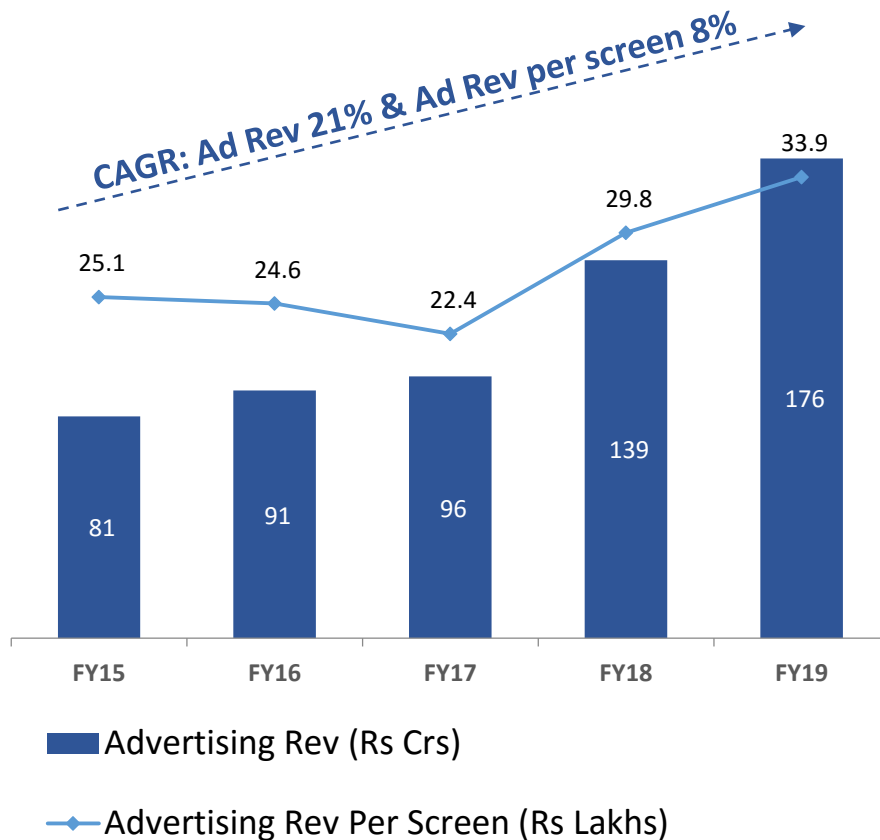
All figures in INR, unless specified



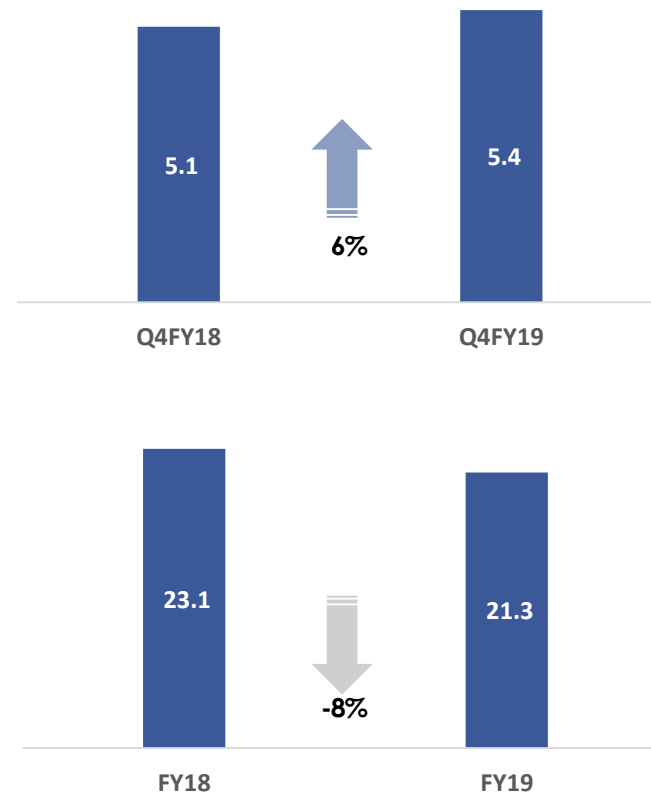
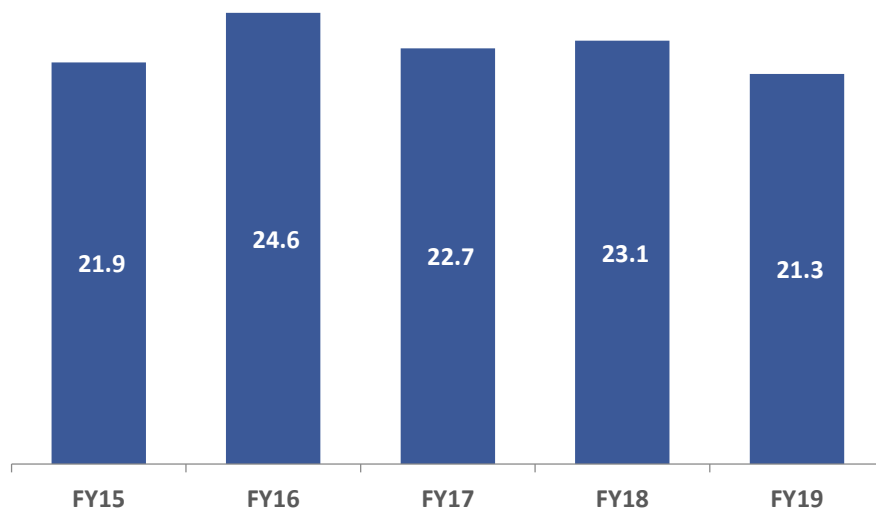
SPH Contribution (Rs.) = SPH (Rs.) x F&B Contribution (%)

All figures in INR, unless specified

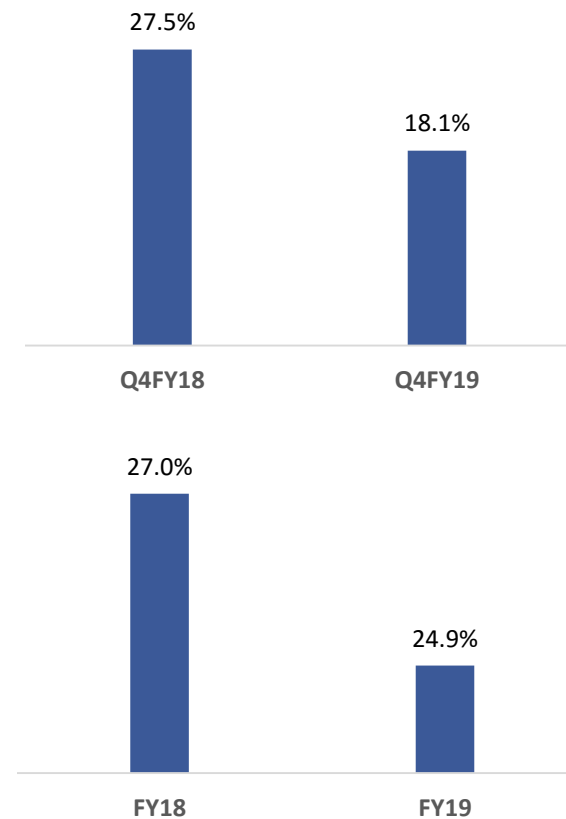
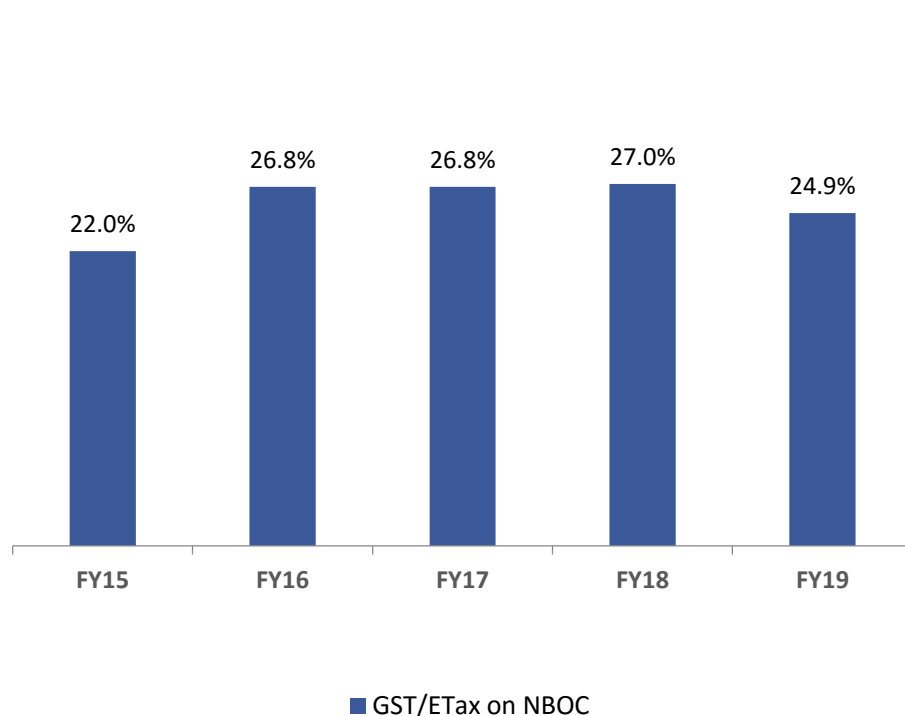




Other Operating Income Per Screen

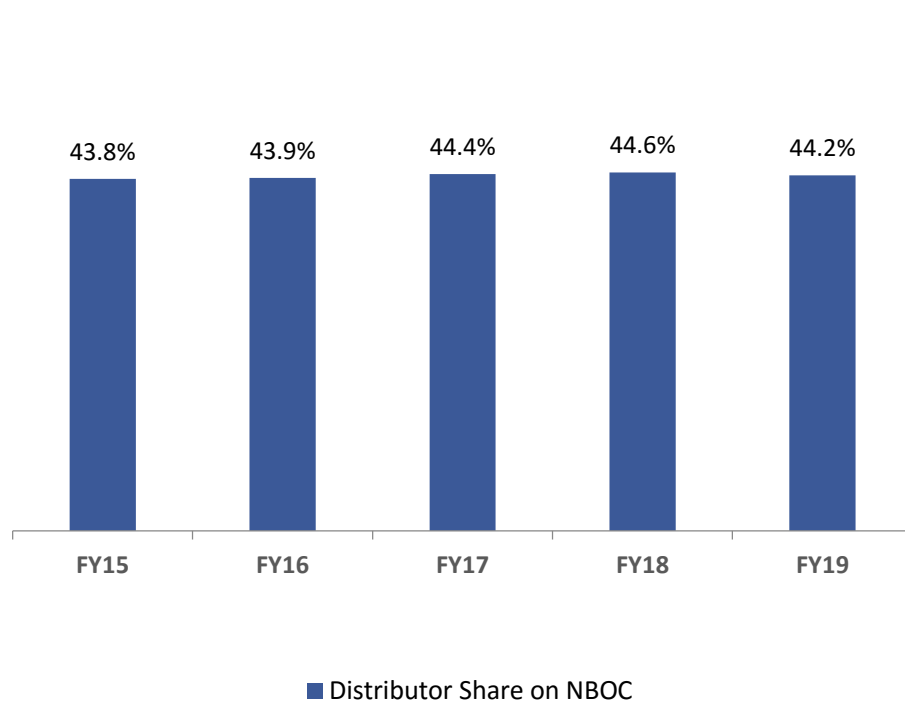


All figures in INR Lakhs, unless specified

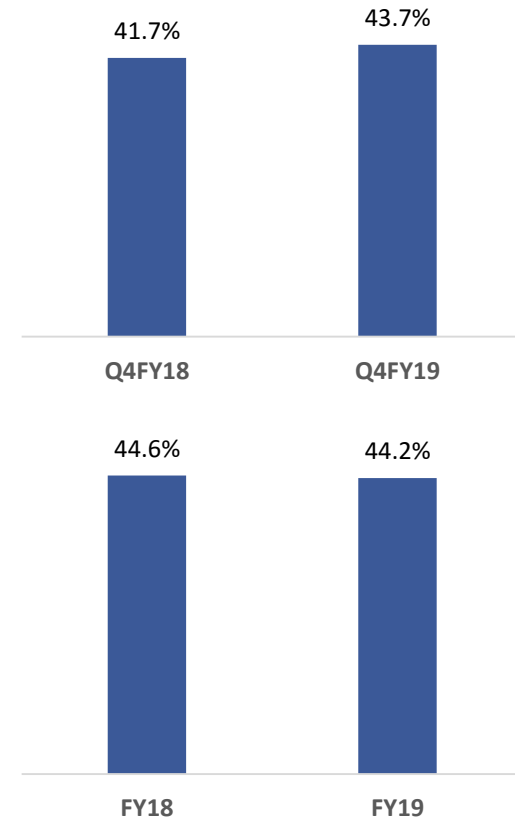


* W.e.f 1st Jan 2019, GST rate on tickets is reduced from 28%/18% to 18%/12%

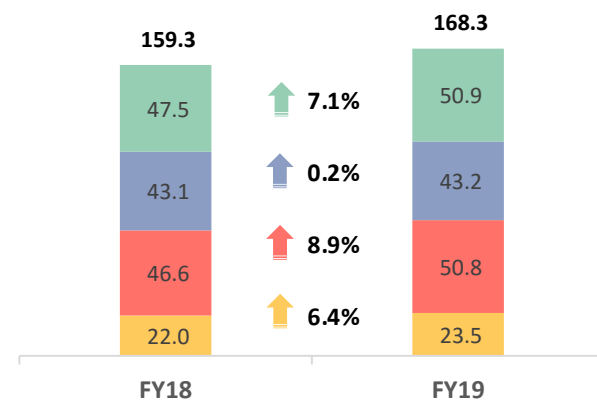
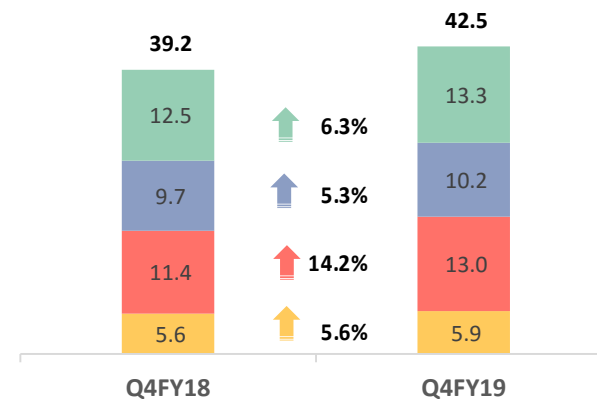
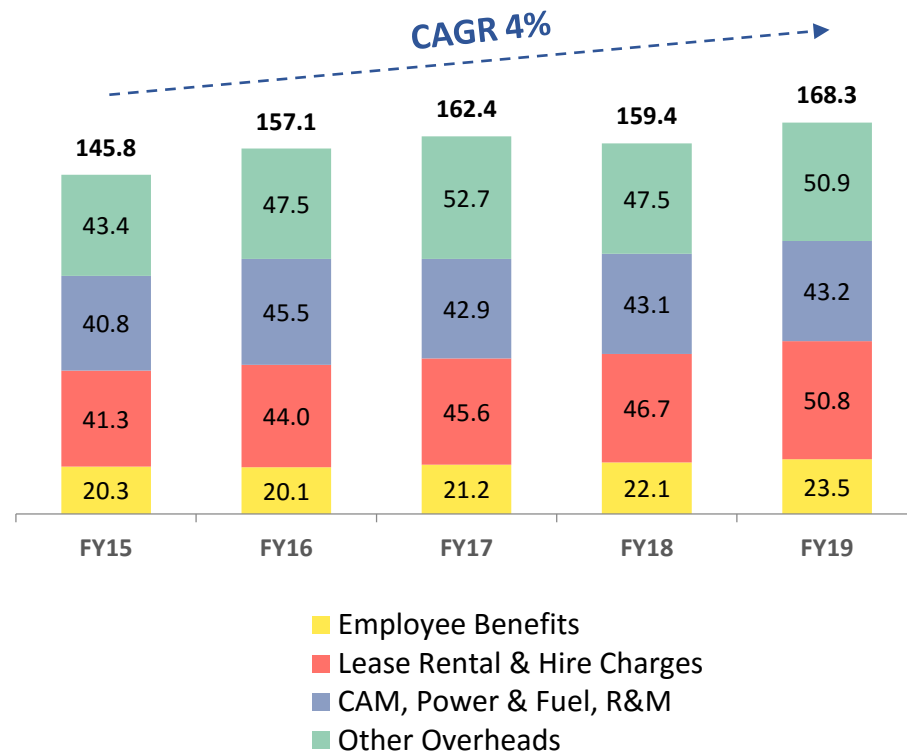
Film Distributor Share (%)



NBOC (Net Box Office Collections)



Other Overheads Per Operating Screen



All figures in INR Lakhs, unless specified

Competitive Advantage

- Recognised And Trusted Corporate Group
- Well Diversified Presence Across India
- Strong New Screens Pipeline
- Strong Brand Partnerships
- Strong Balance Sheet
- State Of The Art Technology, Unmatched Service And Ambience

ANNEXURE: RECOGNISED AND TRUSTED CORPORATE GROUP



LISTED COMPANIES

OTHER KEY COMPANIES



- Largest producer of (by volume) Chloromethanes, refrigerants and Polytetrafluoroethylene in India.
- Pioneer of carbon credits in India

- Fully integrated player in the wind energy market
- State-of-the-art manufacturing plants near Ahmedabad (Gujarat), Una (Himachal Pradesh) and Barwani (Madhya Pradesh). Our Madhya Pradesh facility is one of the largest in Asia
- Ability to provide end-to-end turnkey solutions for wind farms

- One of the largest multiplex chains in India
- In the business of setting up, operating and managing a national chain of multiplexes under the brand name 'INOX'
- Present in 67 cities with 143 multiplexes and 595 screens

- 50:50 joint venture with Air Products Inc., USA
- Largest producer of industrial gases in India
- 40 plants spread throughout the country

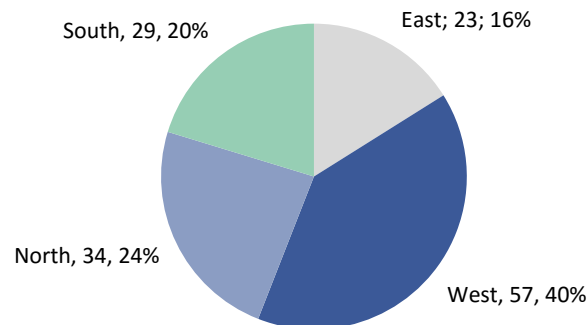
- Largest producer of cryogenic liquid storage and transport tanks in India
- Offers comprehensive solutions in cryogenic storage, vaporization and distribution engineering
- Has operations in India, USA, Netherlands and Brazil

- 90 Year track record of consistent business growth
- USD \$3 Billion Inox Group diversified across 7 different businesses

- 10,000+ employees at 150+ business units across India
- Distribution network spread over 50+ countries

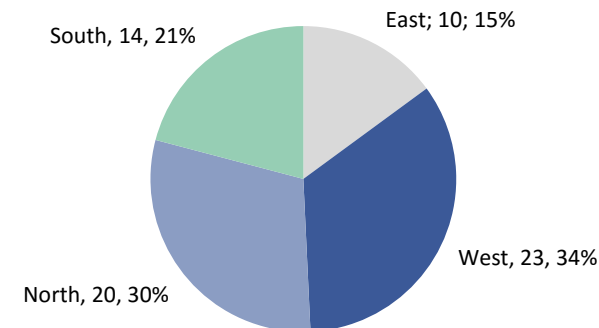
**Well Diversified
Distribution of
Multiplexes
across India**

143 Properties



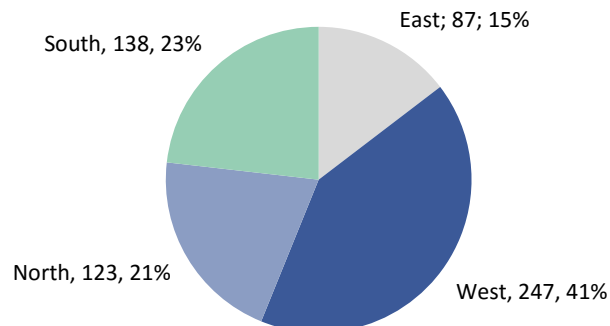
**Access to
Wide Variety of
Regional Content**

67 Cities

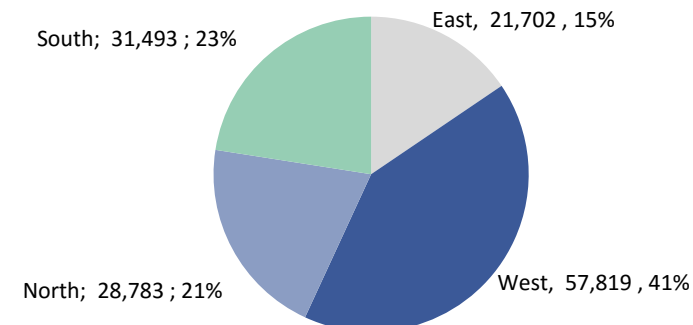


**Lower Dependency
on Hindi and English
Content**

595 Screens



139,797 Seats



Includes 8 management properties with 29 screens and 7,370 seats

FY20 Pipeline				
Properties	Open Date	Properties	Screens	Seats
Lucknow Garden	12-Apr-19	1	4	803
Taksh Galaxy	3-May-19	1	5	976
Bengaluru Yelahnika	28-Jun-19	1	4	756
Hyderabad GSM	29-Jun-19	1	8	1,691
Openings Till Date		4	21	4,226
Gurugram		2	8	970
Kolkata		1	2	342
Bengaluru		1	5	629
Gorakhpur		1	4	761
Lucknow		2	9	1,817
Jalandhar		1	3	822
Indore (existing)		-	6	403
Pune		1	5	1,160
Delhi		2	6	498
Tumkur		1	5	1,000
Vijayawada		1	3	1,022
Salem		1	3	803
Total		18	80	14,453

	Properties	Screens	Seats
FY19	139	574	135,586
FY20 Openings till date	4	21	4,226
Expected Jul'19 to Mar'20	14	59	10,227
*Adjustments	-	-	(15)
FY20 Expected	157	654	150,024
Additions Post FY20	129	882	162,440
Leading to	286	1,536	312,464

STRONG VISIBILITY FROM NEW SCREENS PIPELINE BACKED BY SIGNED AGREEMENTS

*Siliguri ,15 seats reduced due to renovation

Strong Brand Partnerships



BFSI

FMCG

CONSUMER DURABLES

AUTOMOBILES

GEC

ECOMMERCE & TELECOMM.

OTHERS



17%



IDFC LIMITED



Particulars (INR Crs.)	Mar-19	Mar-18
Share Capital	102.6	96.2
Other Equity	893.9	606.1
Interest in Inox Benefit Trust, at cost	(32.7)	(32.7)
Total Shareholder funds	963.8	669.6
Non-Controlling Interest	0.01	0.01
Total Equity	963.8	669.6
Total Debt	110.0	291.9
Other Non-Current Liabilities	90.7	88.9
Total Sources of Funds	1,164.5	1,050.4
Fixed Assets	986.1	825.7
Other Non-Current Assets	341.3	315.8
Current Assets	137.6	116.5
Cash & Cash Equivalents	13.7	26.9
Less: Current Liabilities	314.3	234.6
Net Current Assets	(163.0)	(91.1)
Total Assets	1,164.5	1,050.4

Key Balance sheet Ratios	Mar-19	Mar-18
Net Debt : Equity	0.10	0.40
Return on Equity (ROE)#	16.3%	18.8%
Return on Capital Employed (ROCE)	20.9%	13.2%

ROE (TTM): PAT/Avg. Equity, ROCE (TTM): EBIT/Avg. Capital Employed (Capital Employed = Equity + Total Debt)

#Includes Tax write back pertaining to earlier years of Rs.53.7 crs.(FY18) and Rs.4.6crs (FY19)

**Strong
Balance Sheet**



**Low Leverage
Net D/E: 0.10x**

**Treasury Stock in
Inox Benefit Trust**



142 INR Crs.

As on 28-Jun-19

**Real Estate on
Balance Sheet**



INR 350 Crs.

Promoters Stake



51.9%



**Potential To Grow Aggressively Without Any
Stress On Balance Sheet**

Focus On Strong Technology, Unmatched Service And Ambience

Focus On Technology

- ILL is the first multiplex chain to implement SAP HANA with all integrated functions
- Focus on ensuring transparency with regulatory agencies and distributors through daily performance analysis reports
- The Network Operations Centre (NOC) in Mumbai enables continuous monitoring, control and reporting of information on all digital systems across the country. Advertisers can track their advertisement screening at various multiplexes on real-time basis leading to improved transparency and higher advertising revenues for ILL
- ILL stands for the best in LUXURY, SERVICE and TECHNOLOGY and keeping this core in mind; INOX has tied up with IMAX for the best in cinema viewing experience for 10 screens.
- ILL has pioneered Laser projection across the country including India's first Laserplex.
- ILL has tied up with Samsung for its ONYX Cinema LED screen technology.
- ILL has tied up with MX4D for providing exciting in-cinema 4D effects to its Patrons.
- ILL has tied up with ScreenX to provide a 270 degree viewing experience on 3 walls of the theatre enabled through multi-projection system.

Focus on high quality video and audio

- ILL operates high quality DCI Compliant 2K & 4K Digital Projection Systems across all the screens in India
- High-definition picture quality, strong 3D capabilities and high frame rate (HFR) (can go up to 60 fps)
- ILL has been one of the early adopters of Dolby ATMOS sound technology. Excellent acoustic systems and distortion free sound

Focus on service and ambience:

- Focus on providing world class ambience.
- ILL with its in-app F&B ordering and Qbuster service, is able to considerably reduce its queue size and transaction time
- Emphasis on safety, comfort and convenience



Spider-Man: Far from Home

Release Date:

5th July 2019

Cast: Zendaya, Tom Holland, Jon Favreau

Director: Jon Watts

Banner: Sony Pictures Releasing, Columbia Pictures, Marvel Studios



Malaal

Release Date:

5th July 2019

Cast: Sharmin Segal, Meezaan Jaffrey

Director: Mangesh Hadawale

Banner: Bhansali Productions, T-Series



Super 30

Release Date:

12th July 2019

Cast: Hrithik Roshan, Mrunal Thakur

Director: Vikas Bahl

Banner: Phantom Films, Reliance Entertainment, Nadiadwala Grandson Entertainment



The Lion King

Release Date:

19th July 2019

Cast: Chiwetel Ejiofor, Seth Rogen, Billy Eichner

Director: Jon Favreau

Banner: Fairview Entertainment, Walt Disney Pictures



Arjun Patiala

Release Date:

26th July 2019

Cast: Diljit Dosanjh, Kriti Sanon

Director: Abhishek Chaubey

Banner: Maddock Films



Mental Hai Kya

Release Date:

26th July 2019

Cast: Kangana Ranaut, Rajkumar Rao

Director: Prakash Kovelamudi

Banner: Balaji Motion Pictures, Karma Media

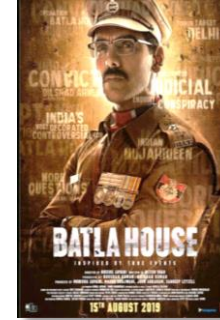


Hobbs & Shaw

Release Date:
2nd August 2019
Cast: Dwayne Johnson,
Idris Elba, Eiza
González
Director: David Leitch
Banner: Universal
Pictures

Mission Mangal

Release Date:
15th August 2019
Cast: Akshay Kumar,
Vidya Balan, Taapsee
Pannu
Director: Jagan Shakti
Banner: Cape of Good
Films, Fox Star Studios



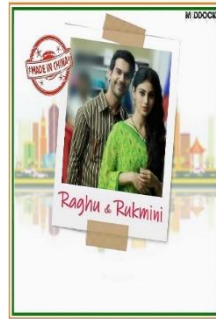
Batla House

Release Date:
15th August 2019
Cast: John Abraham,
Mrunal Thakur
Director: Nikhil Advani
Banner: T-Series Super
Cassettes Industries Ltd.,
Emmay Entertainment
Pvt. Ltd, JA
Entertainment Pvt. Ltd.



Saaho

Release Date:
15th August 2019
Cast: Prabhas,
Shraddha Kapoor
Director: Sujeeth
Banner: UV Creations,
T-Series, Dharma
Productions



Made in China

Release Date:
30th August 2019
Cast: RajKummar
Rao, Mouni Roy
Director: Mikhil
Musale
Banner: Maddock
Films



Chhichhore

Release Date:
30th August 2019
Cast: Sushant Singh
Rajput, Shraddha Kapoor
Director: Nitesh Tiwari
Banner: Fox Star Studios,
Nadiadwala Grandson
Entertainment



IT - Chapter 2

Release Date:
6th September 2019
Cast: James McAvoy ,
Jessica Chastain
Director: Andy
Muschiatti
Banner: KatzSmith
Productions, Lin
Pictures, New Line
Cinema

Commando 3

Release Date:
6th September 2019
Cast: Vidyut Jammwal,
Adah Sharme
Director: Aditya Datt
Banner: Reliance
Entertainment



Laal Kaptaan

Release Date:
6th September 2019
Cast: Saif Ali Khan,
Manav Vij
Director: Navdeep
Singh
Banner: Eros
International
Colour Yellow
Productions



Dream Girl

Release Date:
13th September 2019
Cast: Ayushmann
Khurrana, Nushrat
Bharucha
Director: Raaj
Shaandilyaa
Banner: Balaji Motion
Pictures, ALT
Entertainment,
Mangl Murti Films



The Zoya Factor

Release Date:
20th September 2019
Cast: Sonam Kapoor,
Dulquer Salman
Director: Abhishek
Sharma
Banner: Fox Star
Studios, Adlabs Films
Ltd



Ad Astra

Release Date:
20th September 2019
Cast: Brad Pitt, Tommy
Lee Jones, Liv Tyler
Director: James Gray
Banner: Maddock
Films



INOX Metro, Mumbai

Annexure

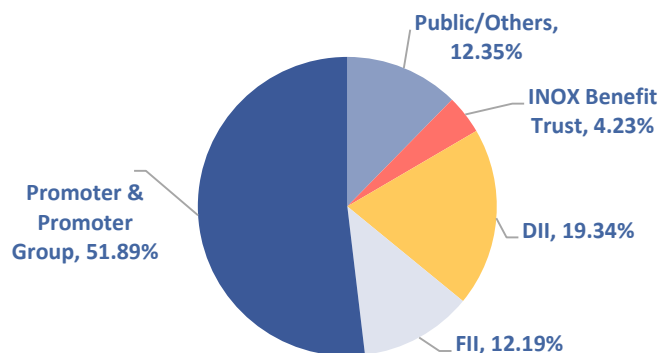
INOX
LIVE *the* MOVIE

Share Price Performance



Source: BSE

% Shareholding as of 28th Jun 2019



Source: Company

Market Data

As on 28-Jun-19

No. of Shares Outstanding (Cr.)	10.3
Face Value (INR)	10.0
Price (INR)	327.3
52 week High/Low (INR)	382.60/189.65
Market Capitalisation (INR Cr.)	3,367

Source: BSE

Key Institutional Investors – 28th Jun 2019

Holding

HDFC MF	6.2%
Reliance MF	3.4%
Sundaram MF	3.1%
Aditya Birla Sunlife	2.6%
DSP Blackrock MF	2.0%
Taiyo Greater India Fund Ltd	1.7%
BNP Paribas MF	1.2%
DFA Investments Group	1.2%
Morgan Stanley	1.0%
RAMS Equities Portfolio Fund	0.9%
Cohesion Fund	0.8%
AADI financial	0.7%

Source: Company

Consolidated Profit & Loss Statement



Particulars (INR Crs.)	Q4FY19	Q4FY18	YoY %	Q3FY19	QoQ %	FY19	FY18	YoY %
Revenue from Operations	478.8	323.6	48.0%	433.1	10.6%	1,692.2	1,348.1	25.5%
Exhibition Cost	127.2	81.3	56.5%	112.2	13.4%	444.2	367.3	20.9%
Food & Beverages Cost	31.7	19.5	62.6%	28.3	11.9%	112.5	74.4	51.3%
Employee Benefits Expense	30.9	25.4	21.4%	30.2	2.3%	115.2	96.4	19.5%
Lease Rental & Hire Charges	68.3	52.1	31.2%	64.2	6.5%	249.3	203.8	22.4%
CAM, Power & Fuel, R&M	53.6	44.3	21.0%	52.7	1.7%	211.9	188.2	12.6%
Other Expenses	69.8	57.2	22.1%	62.1	12.5%	249.9	207.7	20.3%
EBITDA	97.4	43.9	121.9%	83.5	16.6%	309.2	210.4	46.9%
EBITDA Margin %	20.3%	13.6%	678 bps	19.3%	105 bps	18.3%	15.6%	266 bps
Depreciation & Amortisation	24.8	21.9	13.2%	24.5	1.3%	95.5	86.7	10.1%
Impairment Loss on PP&E	0.8	1.8	-55.1%	-		0.8	3.1	-73.5%
Other Income	5.2	6.2	-16.0%	3.1	69.3%	14.9	14.5	3.1%
Finance Cost	3.8	7.1	-46.7%	6.2	-38.9%	23.7	28.9	-18.1%
Exceptional Items	5.0	8.5	-41.5%	-		5.0	8.5	-41.5%
Share of Profit from Joint Ventures	-	(0.0)	-100.0%	-		-	(0.0)	-100.0%
PBT	68.2	10.7	538.1%	55.9	22.0%	199.1	97.6	103.9%
Current Tax	21.5	0.9	2207.5%	16.5	30.3%	60.1	32.5	84.9%
Deferred Tax	3.1	5.8	-45.5%	2.9	7.5%	10.1	4.2	139.3%
Tax pertaining to earlier years	(4.6)	(53.7)	-91.5%	-		(4.6)	(53.7)	-91.5%
PAT	48.1	57.7	-17%	36.4	32%	133.5	114.6	16%
PAT Margin %	10.0%	17.8%	-779 bps	8.4%	162 bps	7.9%	8.5%	-61 bps
Earnings Per Share (EPS)	4.97	1.43	248%	3.90	27%	14.20	12.49	14%

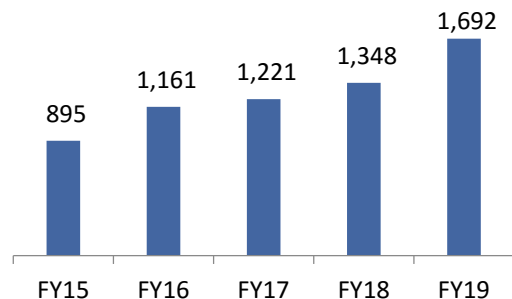
Consolidated Balance Sheet Statement



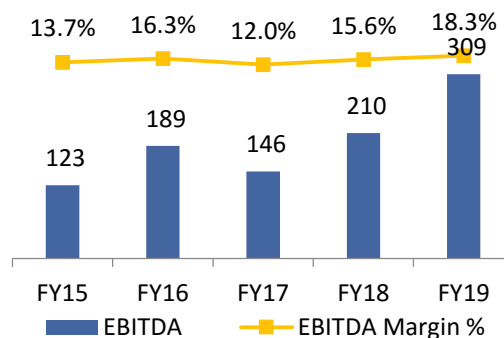
Equity & Liabilities (INR Crs.)	Mar-19	Mar-18
Equity:		
Equity Share Capital	102.6	96.2
Other Equity	893.9	606.1
Interest in Inox Benefit Trust, at cost	(32.7)	(32.7)
Equity attributable to owners of the company	963.8	669.6
Non-Controlling Interest	0.0	0.0
Total Equity	963.8	669.6
Non-current liabilities:		
Borrowings	55.0	252.4
Other Financial Liabilities	9.0	3.1
Provisions	12.7	10.1
Other Non-current Liabilities	69.0	75.7
Total of Non-Current Liabilities	145.7	341.3
Current Liabilities:		
Borrowings	20.0	-
Trade Payables	159.6	113.2
Other Financial Liabilities	120.4	105.7
Other Current Liabilities	47.5	38.2
Provisions	14.4	14.8
Income Tax Liabilities (Net)	7.4	2.1
Total of Current Liabilities	369.3	274.1
Total Equity & Liabilities	1,478.8	1,285.0

Assets (INR Crs.)	Mar-19	Mar-18
Non-Current Assets:		
Property, Plant & Equipment	893.9	742.7
Capital work-in-progress	63.7	53.9
Goodwill	17.5	17.5
Other Intangible Assets	11.1	11.5
Investments in Joint Ventures	-	-
Other Investments	0.6	1.2
Loans	89.2	74.2
Other Financial Assets	86.0	67.5
Deferred Tax Assets (Net)	52.9	81.1
Tax Assets (Net)	8.8	9.1
Other Non Current Assets	103.9	82.7
Total Non Current Assets	1,327	1,142
Current Assets:		
Inventories	12.2	9.4
Other Investments	0.6	12.4
Trade Receivables	88.2	75.9
Cash and Bank Balances	11.8	13.3
Bank Balances Other than above	1.9	1.7
Loans	5.2	5.9
Other Financial Assets	0.2	0.2
Income Tax Assets (net)	4.6	-
Other Current Assets	26.7	24.6
Total Current Assets	151.3	143.4
Total Assets	1,478.8	1,285.0

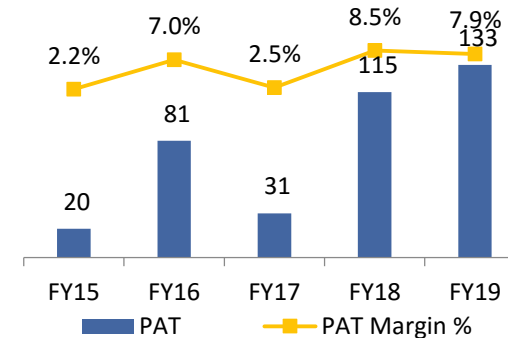
REVENUES



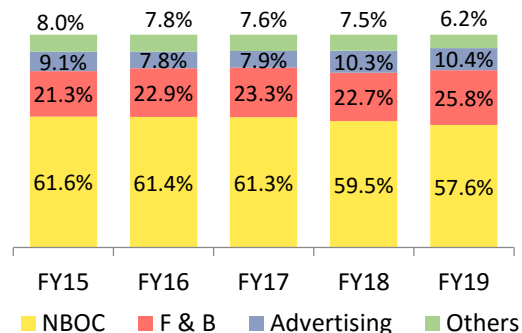
EBITDA



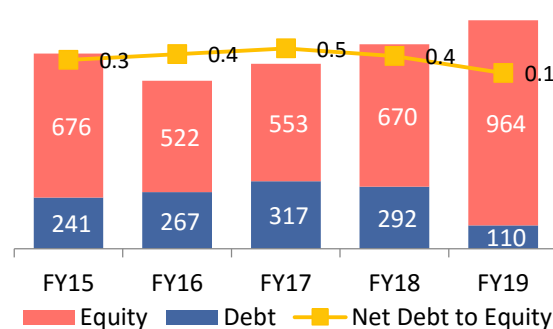
PAT



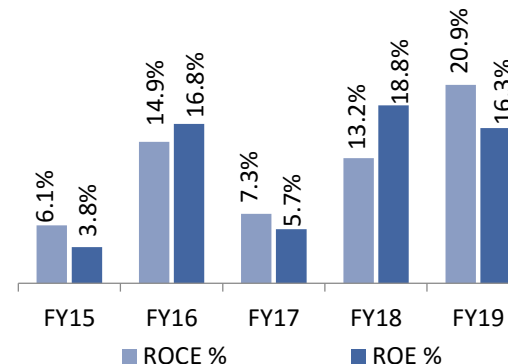
REVENUES - SEGMENT BREAKUP



LEVERAGE ANALYSIS



RETURN METRICS



ROE: PAT/Avg. Equity, ROCE: EBIT/Avg. Capital Employed [(Capital Employed = Equity + Total Debt)

Net Debt = Total Debt – Cash – Bank – Liquid MF Investments

All figures in INR Crs., unless specified



Thank You

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INOX

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IMAX

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