

INOX
LIVE the MOVIE



OFFICIAL SPONSOR OF THE INDIAN OLYMPIC TEAM

RESULTS
UPDATE Q3&9M FY23

INOX

ADVANCING

Spectacularly

INSIGNIA



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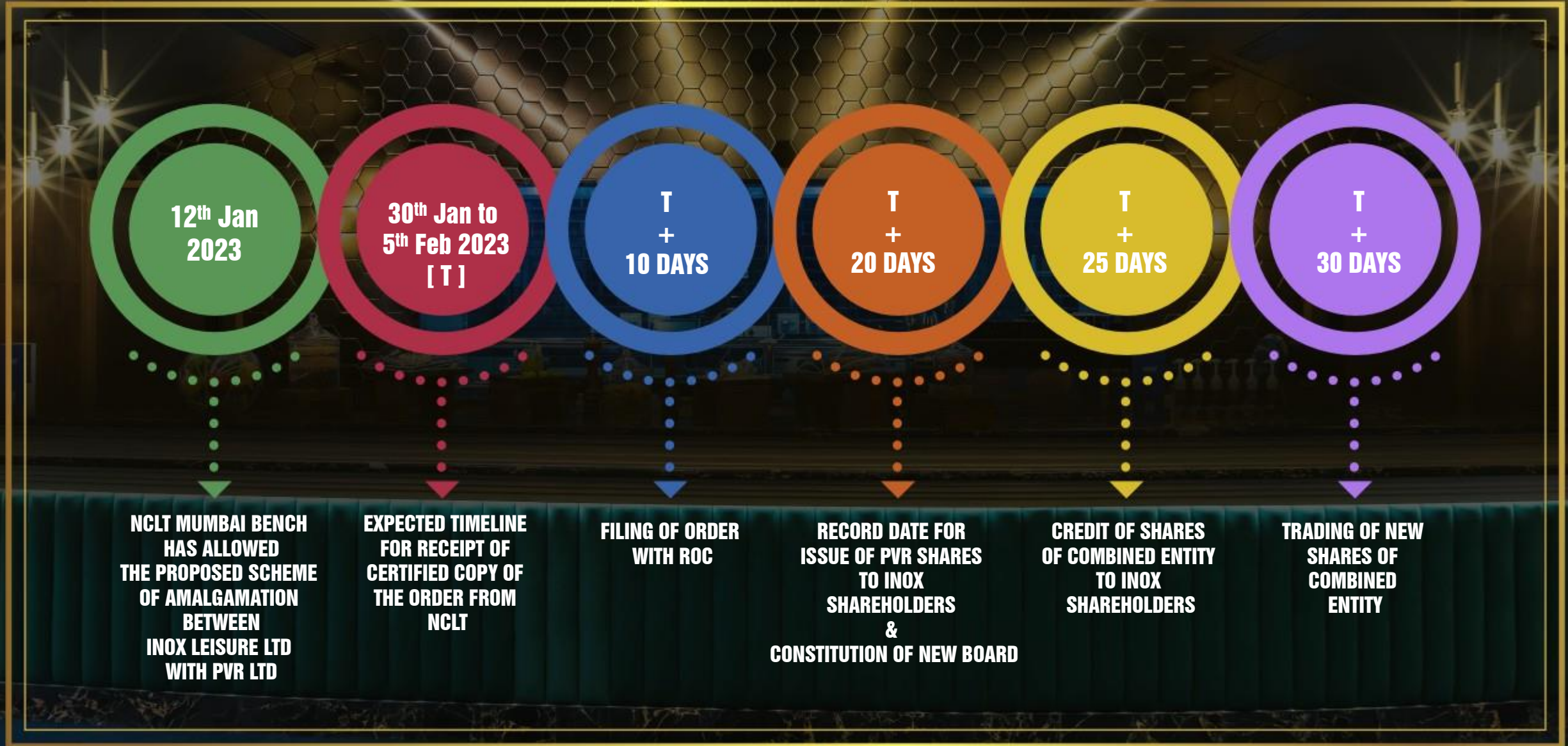
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SUMMARY

- **INOX PVR Merger Update**
- **Key Highlights**
- **Financial Highlights: Q3&9M FY23**
- **Shareholding Structure**
- **New Property Openings: Q3 FY23**
- **Screen Outlook FY23**
- **Movie Pipeline**
- **Enhanced Audience Outreach & Engagement**
- **Cash Flow Planning**
- **Annexure**



INOX PVR MERGER UPDATE



Note: Timelines suggested above are estimates and may change.

KEY HIGHLIGHTS

Highest
**SCREEN
ADDITION**
IN INDUSTRY FOR 9MFY23
45

Q3FY23
Highest Ever
QTRLY
ATP ₹ **230**
SPH ₹ **106**

9MFY23
Highest Ever
9 MONTHS
ATP ₹ **226**
SPH ₹ **101**

Strong
Liquidity
POSITION
₹ **230 Cr**
CASH & CASH EQUIVALENTS
AS ON 28TH JAN, 2023

Only
National
CHAIN
..... TO BE
NET DEBT FREE

Q3FY23 VS Q3FY20

	REVENUE	EBITDA*	Adj PAT*
Q3 FY23	₹522CR ▲ 1%	₹87CR ▼ 19%	₹40CR [#] ▼ 22%
Q3 FY20	₹518CR	₹108CR	₹51CR

*Excludes Impact of INDAS 116
FY21& FY22 were COVID-19 impacted hence compared with Q3FY20

To make PAT of Q3FY23 comparable with Q3FY20, following has been added back to PAT of Q3FY23

- ₹43cr of Deferred tax charge on account of business loss written-off and
- ₹24cr x (1-Tax) of Merger Expenses (Exceptional items)

9MFY23 VS 9MFY20

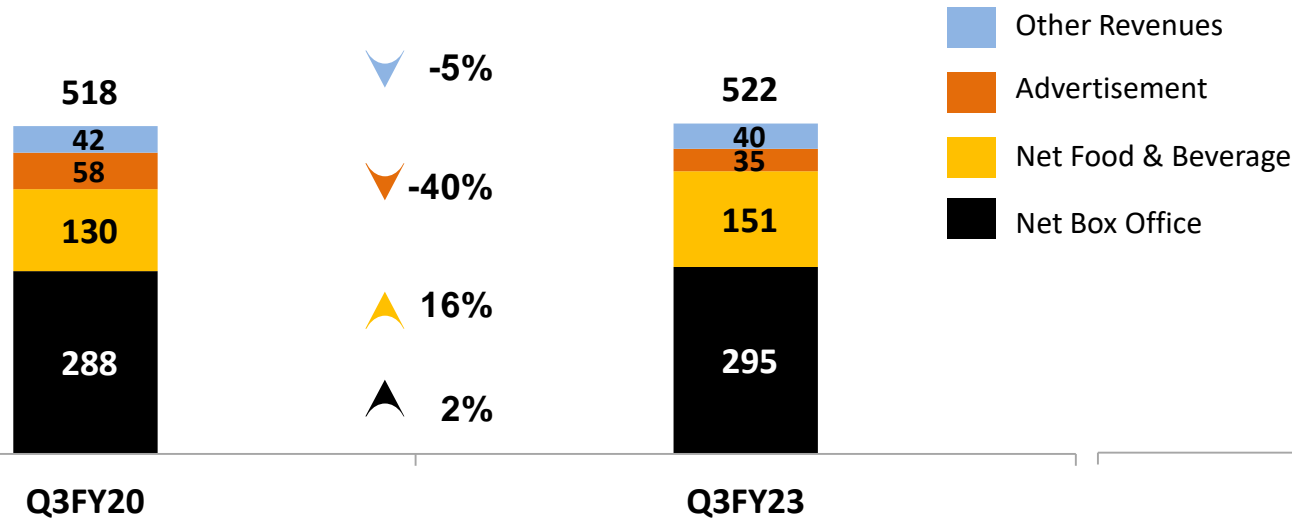
	REVENUE	EBITDA*	Adj PAT*
9M FY23	₹1,492CR ▼ 3%	₹220CR ▼ 29%	₹92CR [#] ▼ 36%
9M FY20	₹1,538CR	₹308CR	₹144CR

*Excludes Impact of INDAS 116
FY21& FY22 were COVID-19 impacted hence compared with 9MFY20

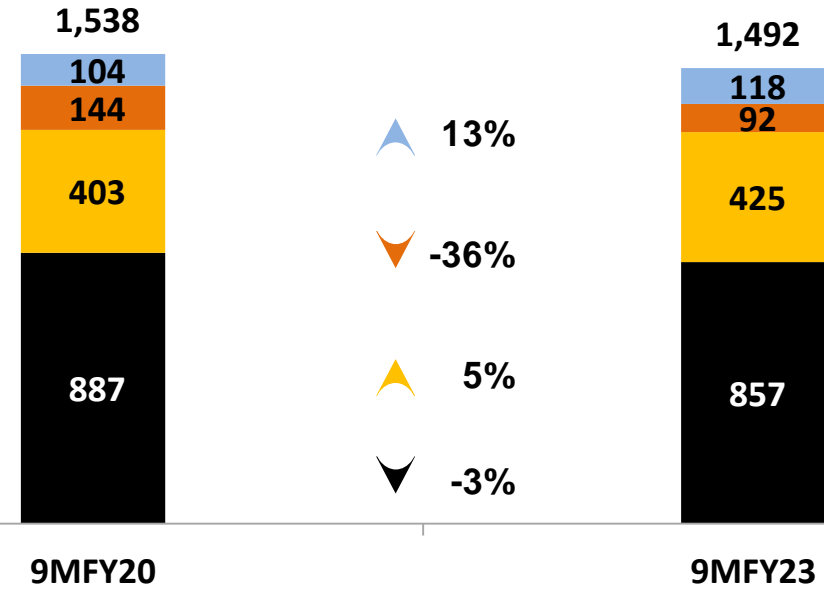
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- ₹43cr of Deferred tax charge on account of business loss written-off and
- ₹24cr x (1-Tax) of Merger Expenses (Exceptional items)

Q3FY20 vs Q3FY23 (₹ Cr)



9MFY20 vs 9MFY23 (₹ Cr)



Note: FY21& FY22 were COVID-19 impacted hence Q3/9MFY23 is compared with Q3/9MFY20

%Share	Q3FY20	Q3FY23	9MFY20	9MFY23
Net Box Office	56%	57%	58%	57%
Net Food & Beverage	25%	29%	26%	28%
Advertisement	11%	7%	9%	6%
Other Revenues	8%	8%	7%	8%
Total Revenues	100%	100%	100%	100%

Q3FY23 VS Q3FY20

	FOOTFALLS	OCCUPANCY%	ATP	SPH
Q3 FY23	153Lakh ▼ 9%	23% ▼ 4%	₹230 ▲ 13%	₹106 ▲ 31%
Q3 FY20	169Lakh	27%	₹204	₹81

Footfalls with management properties is 160lakh/178lakh for Q3FY23/Q3FY20 respectively

FY21& FY22 were COVID-19 impacted hence compared with Q3FY20

KEY OPERATIONAL METRICS ANALYSIS

9MFY23 VS 9MFY20

	FOOTFALLS	OCCUPANCY%	ATP	SPH
9M FY23	453Lakh ▼ 15%	23% ▼ 6%	₹226 ▲ 14%	₹101 ▲ 26%
9M FY20	532Lakh	29%	₹199	₹80

Footfalls with management properties is 474lakh/559lakh for 9MFY23/9MFY20 respectively

FY21& FY22 were COVID-19 impacted hence compared with 9MFY20

IND AS 116 IMPACT ON PROFIT & LOSS

Consolidated Profit & Loss [In ₹ Cr]	Q3FY23				Q3FY20 Without Ind AS 116	Q2FY23 Without Ind AS 116	9MFY23				9MFY20 Without Ind AS 116
	Reported	Ind AS 116 Impact	Without Ind AS 116	% Change Vs Q3FY20			Reported	Ind AS 116 Impact	Without Ind AS 116	% Change Vs 9MFY20	
Total Revenue	522	-	522	1%	518	381	1492	-	1,492	-3%	1,538
Exhibition Cost	132	-	132	-1%	134	95	386	-	386	-4%	403
Food & Beverages Cost	34	-	34	6%	32	26	97	-	97	-3%	100
Employee Benefits Expense	32	-	32	-14%	37	28	87	-	87	-20%	109
Property Rent & CAM	35	89	124	28%	97	117	100	264	364	27%	286
Power & Fuel, R&M	45	-	45	15%	39	48	142	-	142	15%	124
Other Expenses	67	0.14	67	-6%	71	63	195	0.40	196	-6%	209
Total Expenses	345	89	435	6%	409	377	1007	265	1,271	3%	1,231
EBITDA	176	-89	87	-19%	108	3	485	-265	221	-28%	308
EBITDA Margin	34%		17%	-19%	21%	1%	33%		15%	-25%	20%
Depreciation & Amortisation	79	-49	30	11%	27	30	231	-143	89	11%	80
EBIT	98	-41	57	-30%	81	-26	254	-122	132	-42%	228
Finance Cost	69	-66	3	50%	2	2	202	-195	8	14%	7
Exceptional Items (Note 1)	24	-	24		-	-	24	-	24		-
PBT	4	25	29	-63%	79	-29	27	73	100	-55%	220
Current tax	0.02	-	0.02	-100%	25	0.0*	0.02	-	0.02	-100%	73
Deferred tax (Note 2)	45	6	51	1600%	3	-7	51	18	69	1400%	4.6
Taxation pertaining to earlier years	-0.09	-	-0.09	-	-	-	-0.09	-	-0.09	-	-0.4
PAT	-40	19	-22	-	51	-22	-24	54	31	-78%	144
PAT Margin	-8%		-4%	-	10%	-6%	-2%		2%	-78%	9%
Basic Earnings Per Share (EPS)	-3.31	1.54	-1.77	-	5.20	-1.78	-1.94	4.44	2.50	-83%	14.61

Due to rounding-off, figures presented in the table may not add up precisely to the totals provided.

FY21& FY22 were COVID-19 impacted hence Q3/9MFY23 is compared with Q3/9MFY20

*Figure is less than ₹1 lakh

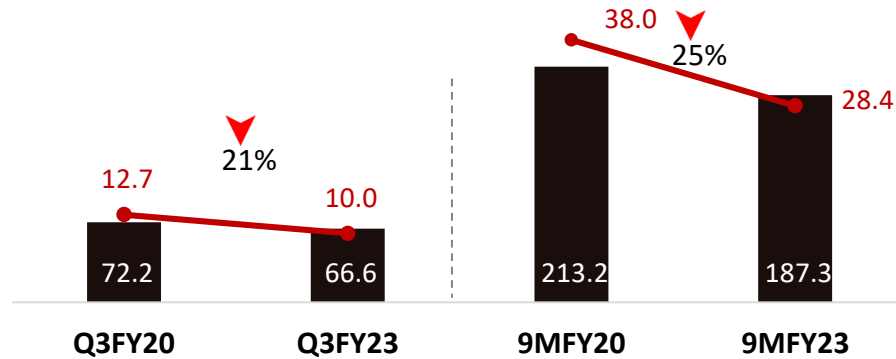
Note:

1) Exceptional item during the quarter/period ended 31 December 2022 is towards expenses incurred in connection with the amalgamation.

2) INOX Leisure Limited had recognised deferred tax asset on tax losses comprising of unabsorbed depreciation and business losses as per the Income-tax Act, 1961. These tax losses pertain to financial year 2020-21 and 2021-22, which was consequent to the COVID-19 pandemic and the resultant lockdown. The scheme of amalgamation between INOX Leisure Limited with PVR Limited has been allowed by NCLT and the appointed date is 1st January 2023. In view of the uncertainty involved in respect of allowability of carried forward of business losses of the INOX Leisure Limited by the PVR Limited, after the amalgamation, the Company has written off deferred tax asset of Rs. 43.37 cr in respect of such business loss

Employee Benefit Expense (Incl. Agency Manpower)

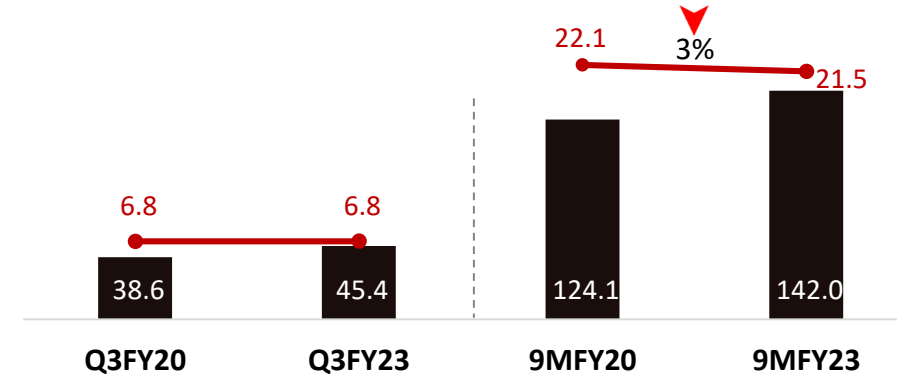
■ Employee Benefit Expense (₹ Cr) ● Per Screen (₹ lacs)



Note: In the above chart, Agency manpower has been regrouped from Other overheads into Employee benefit Expense

Power & Fuel, R&M

■ Power & Fuel, R&M (₹ Cr) ● Per Screen (₹ lacs)

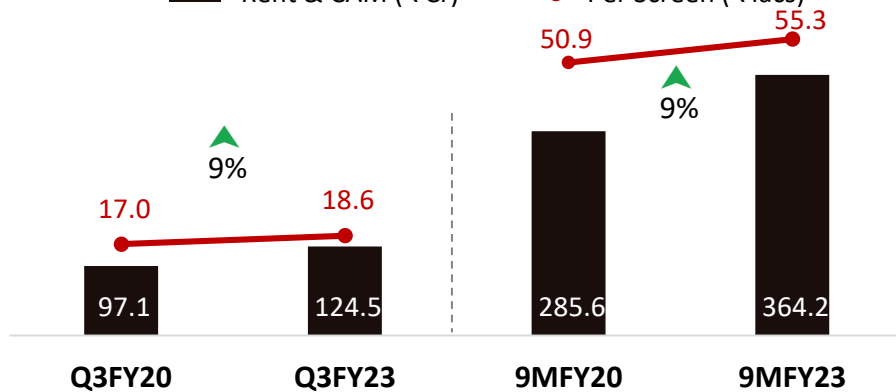


Cost Control

*Rent & CAM

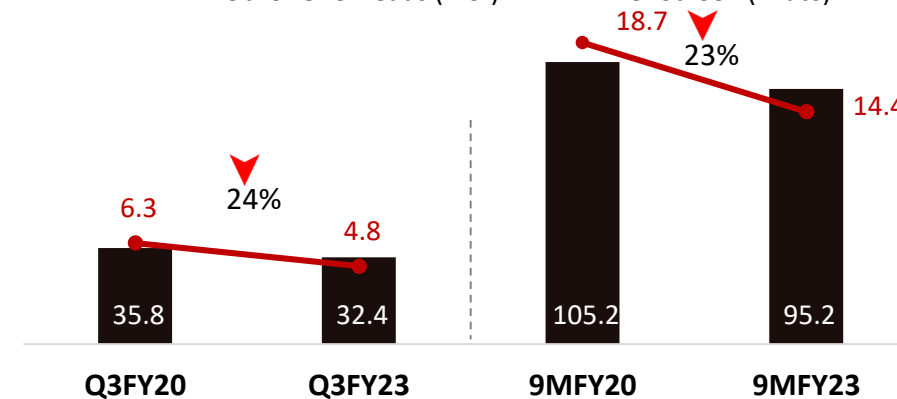
Rent & CAM Escalation kicked in as per agreements

■ *Rent & CAM (₹ Cr) ● Per Screen (₹ lacs)



*Other Overheads

■ Other Overheads (₹ Cr) ● Per Screen (₹ lacs)

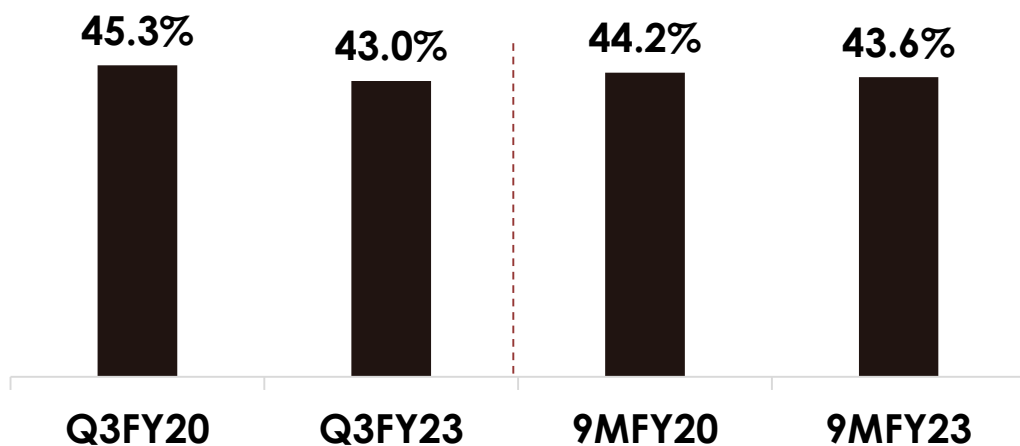


* Excludes INDAS 116 Impact

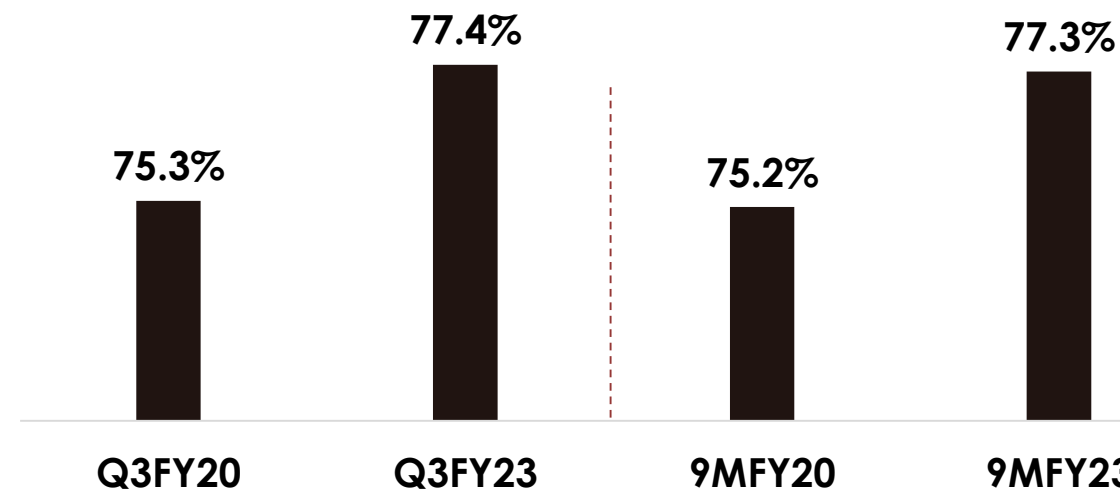
FY21& FY22 were COVID-19 impacted hence Q3/9MFY23 is compared with Q3/9MFY20

DISTRIBUTOR SHARE AND F&B CONTRIBUTION

Distributor Share to NBOC %

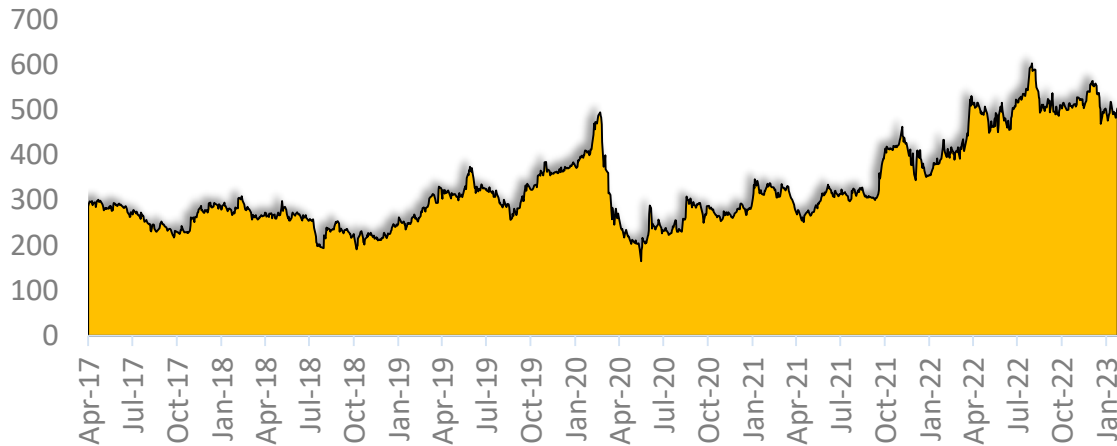


F&B Contribution %

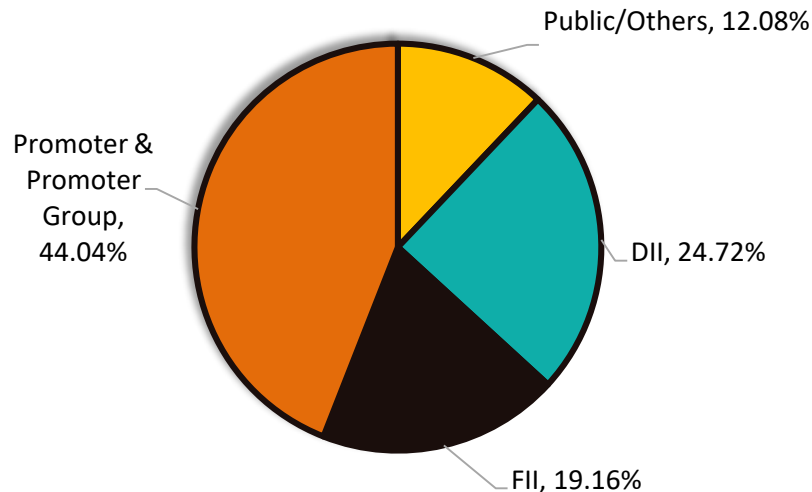


DISTRIBUTOR SHARE IN CONTROL | SIGNIFICANT IMPROVEMENT IN F&B CONTRIBUTION

Share Price Performance



% Shareholding as on 27th Jan 2023



Market Data

As on 27-Jan-23

No. of Shares Outstanding (Cr)	12.2
Face Value (₹)	10.0
Price (₹)	504.40
52 week High/Low (₹)	622.30/380.55
Market Capitalisation (₹ Cr)	6,171

Source: BSE

Key Institutional Investors – 27-Jan-2023

%

ICICI Prudential	9.11%
HDFC MF	4.83%
Kuwait Investment Authority Fund	4.72%
Eastspring Investments	2.65%
Aditya Birla Sunlife MF	2.55%
Sundaram MF	2.46%
Abu Dhabi Investment Authority	2.15%
DSP MF	2.11%
Baroda BNP Pribas	1.26%
Tata MF	1.20%

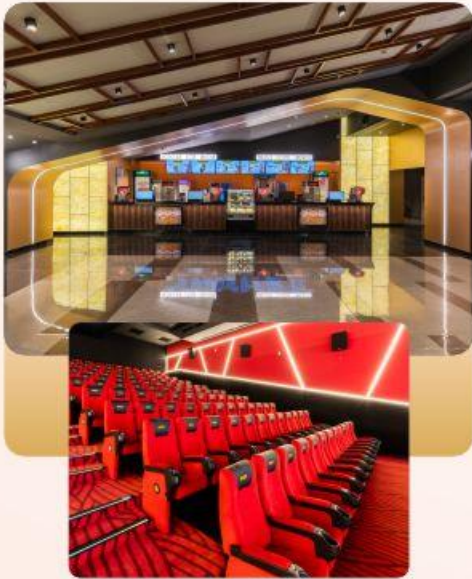
Source: Company

NEW PROPERTY OPENING Q3FY23

15 SCREENS | 2452 SEATS

CMR MALL, GAJUWAKA

3 SCREENS | 803 SEATS



OPENED ON 28TH OCTOBER 2022

CENTRO, MYSURU

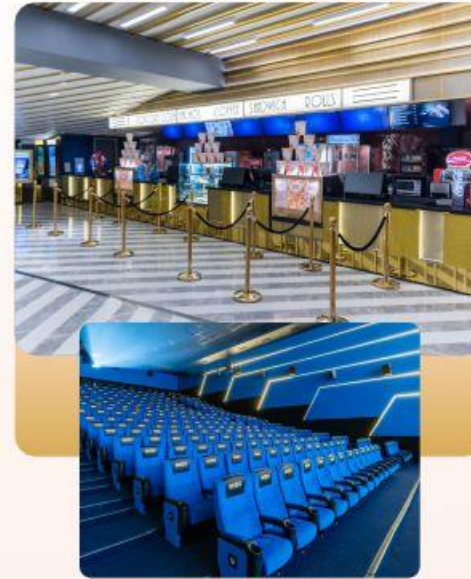
4 SCREENS | 474 SEATS



OPENED ON 25TH NOVEMBER 2022

LAILA MALL, VIJAYAWADA

3 SCREENS | 959 SEATS



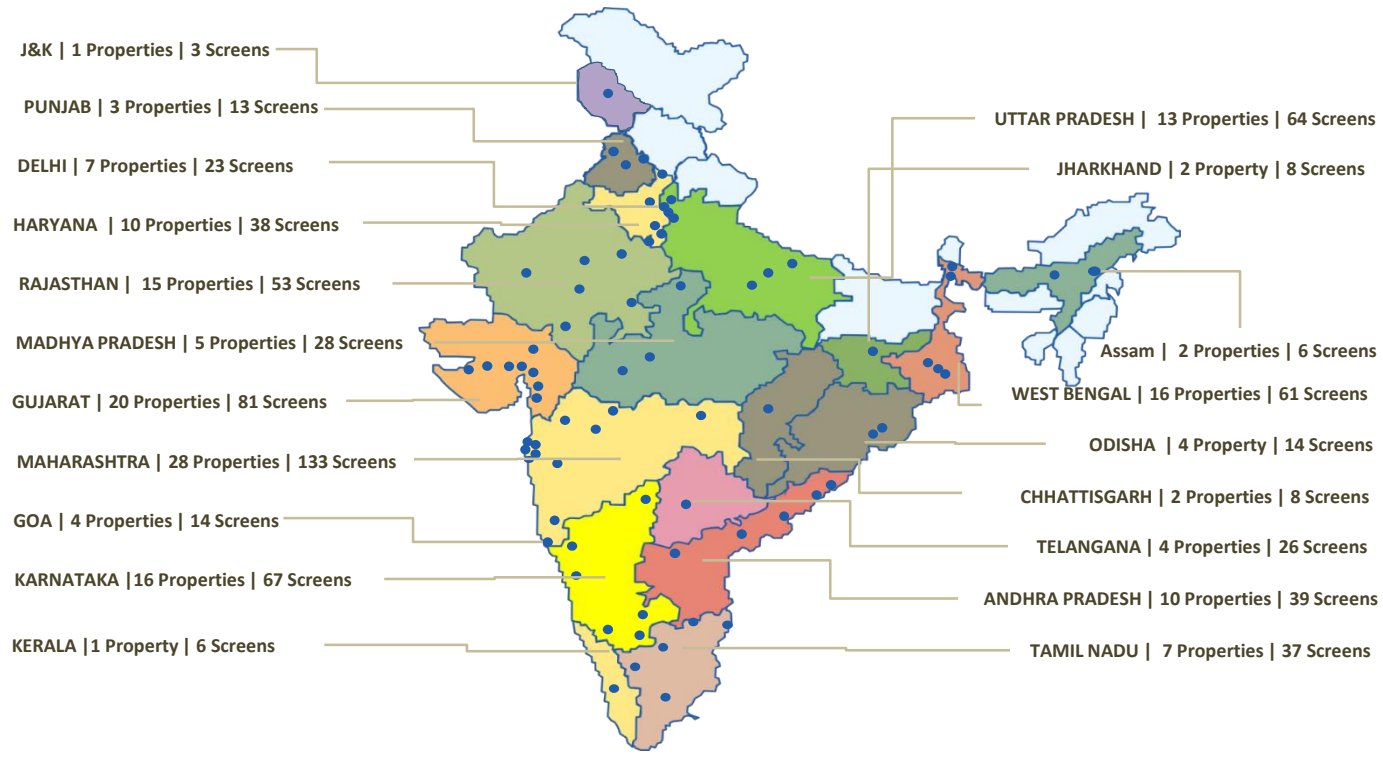
OPENED ON 21ST DECEMBER 2022

RCUBE MONAD MALL, NEW DELHI

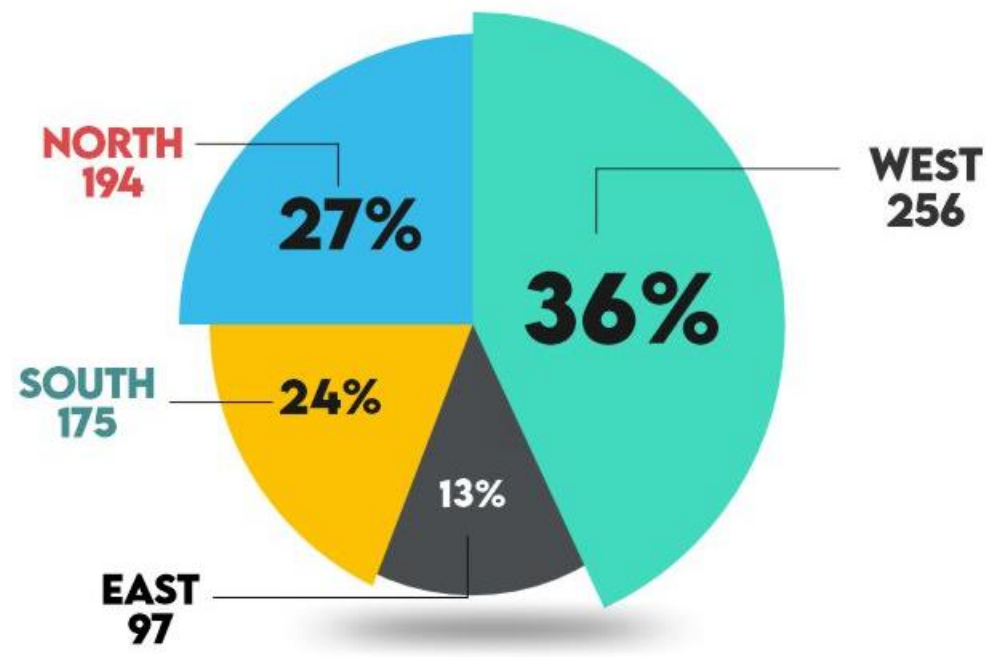
5 SCREENS | 216 SEATS



OPENED ON 21ST DECEMBER 2022



SCREENS ZONE WISE



Includes 10 management properties with 35 screens and 8,360 seats

SCREEN OUTLOOK FOR FY23

FY23 Openings /Upcoming Openings

Properties/Cities	Opening Date	Properties	Screens	Seats
Properties Opened FY23				
Gurugram AIPL Joy Street	14-Apr-22	1	6	940
Hyderabad Necklace	06-May-22	1	7	1,533
Kalaburagi Orchid Mall	15-May-22	1	4	794
Lucknow Emerald	12-Aug-22	1	10	1,550
Srinagar GCM Mall (management)	30-Sep-22	1	3	522
Vizag CMR Gajuwaka	28-Oct-22	1	3	803
Mysuru Centro	25-Nov-22	1	4	474
Delhi R Cube	21-Dec-22	1	5	216
Vijayawada Laila	21-Dec-22	1	3	959
Delhi Odeon	19-Jan-23	1	2	592
FY23 Openings till date		10	47	8,383

Upcoming Properties FY23

Hyderabad		2	9	2,161
Delhi		1	6	983
Patna		1	3	600
Indore		1	8	1,376
Dharwad		1	4	733
Upcoming FY23 total		6	30	5,853
FY23 Estimated Pipeline		16	77	14,236

	Properties	Screens	Seats
Upto FY22	160	675	1,52,173
[+]FY23 Openings till date	10	47	8,383
[+]FY23 Upcoming Openings	6	30	5,853
[-] *Reduction	-	-	-217
At the End of FY23 (Est.)	176	752	1,66,192
Additions Post FY23	115	819	1,50,012
Leading to (Est.)	291	1,571	3,16,204

*Reduction in seats due to conversion of regular screens into premium screens



Note: In the above table, we have not included the proposed acquisition of **Luxe Cinemas (11 screens, 2688 seats)**, which is subject to legal, regulatory, contractual and customary approvals (as applicable) and the completion of the agreed conditions set out in the agreement.

CONTENT DRIVES RECOVERY

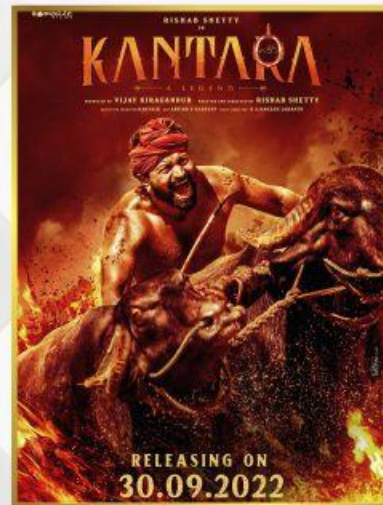
Content Q3FY23

AVATAR: THE WAY OF WATER



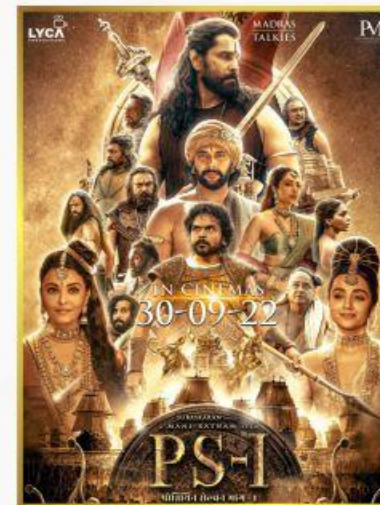
₹ **385 Cr***

KANTARA



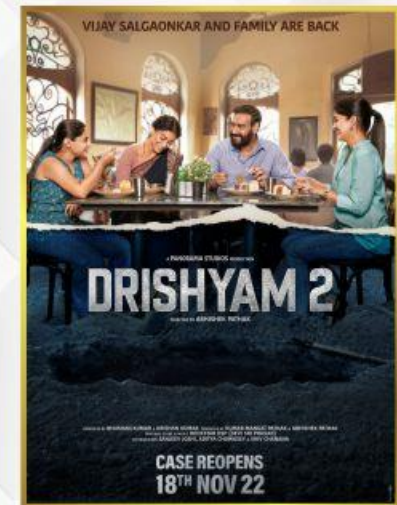
₹ **310 Cr***

PONNIYIN SELVAN: PART I

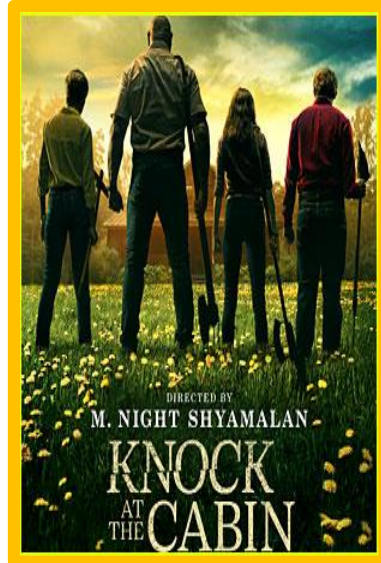


₹ **265 Cr***

DRISHYAM 2



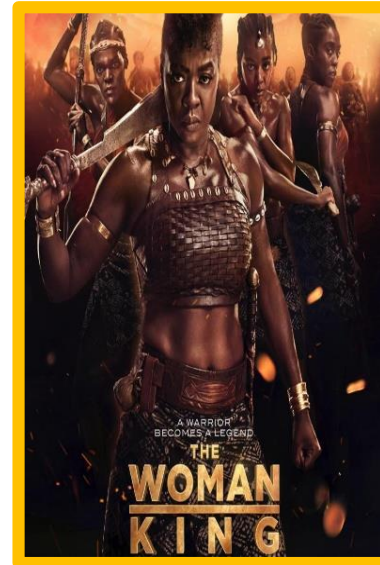
₹ **239 Cr***



KNOCK AT THE CABIN

Cast: Jonathan Groff, Dave Bautista, Rupert Grint
Director: M. Night Shyamalan

Release Date: 3rd Feb'23

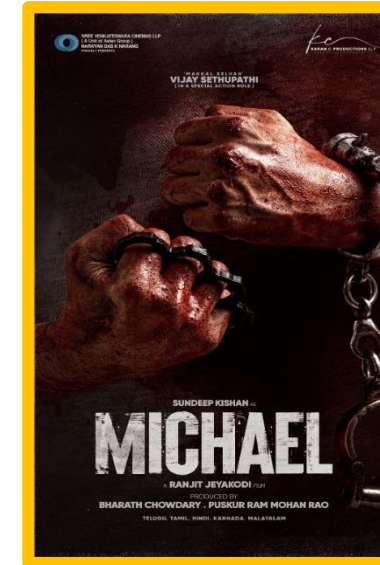


THE WOMAN KING (IMAX)

Cast: Viola Davis, Lashana Lynch, Thuso Mbedu

Director: Ginaprince-Bythewood

Release Date: 3rd Feb'23



MICHAEL [Tamil]

Cast: Vijay Sethupathi, Sundeep Kishan

Director: : Ranjit Jeyakodi

Release date: 3rd Feb'23



CHRISTOPHER [Malayalam]

Cast: Mammootty, Aishwarya, Lekshmi

Director: B. Unnikrishnan

Release date: 9th Feb'23



SHEHZADA

Cast: Kartik Aryan, Kriti Sanon, Paresh Rawal

Director: : Rohit Dhawan

Release date: 10th Feb'23



A MAN CALLED OTTO

Cast: Tom Hanks, Manuel Garcia-Rulfo, Cameron Britton

Director: Marc Forster

Release date: 10th Feb'23



ANT-MAN AND THE WASP : QUANTUMANIA (IMAX)

Cast: Paul Rudd, Evangeline Lilly, Kathryn Newton
Director: : Reyton Reed

Release date: 17th Feb'23



VAATHI (TAMIL)

Cast Dhanush, Samyuktha Menon, Sai Kumar

Director: Venky Atluri

Release date: 17th Feb'23



SHAAKUNTALAM (TELGU)

Cast Samantha Rauth Prabhu, Dev Mohan

Director: Gunashekhar

Release date: 17th Feb'23



SELFIEE

Cast: Akshay Kumar, Emraan Hashmi, Nushratt Bharuccha

Director: Raj Mehta

Release date: 24th Feb'23



CREED III (IMAX)

Cast: Michael B Jordan, Tessa Thompson, Jonathan Majors

Director: Michael B. Jordan

Release date: 3rd Mar'23

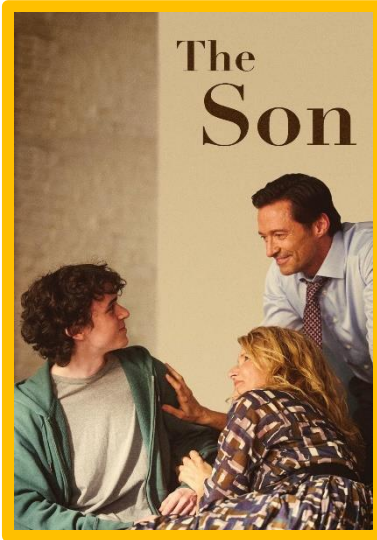


MRS. CHATTERJEE VS NORWAY

Cast: Rani Mukerji, Kristjan Uksula

Director: Ashima Chibber

Release date: 3rd Mar'23



THE SON

Cast: Vanessa Kirby, Hugh Jackman, Laura Dern, William Hope

Director: Florian Zeller

Release date: 3rd Mar'23

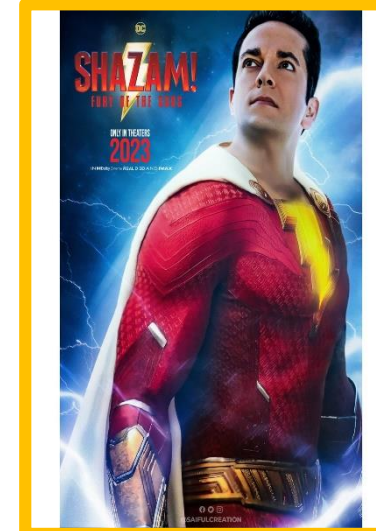


TU JHOOTHI MAIN MAKKAR

Cast: Ranbir Kapoor, Shraddha Kapoor, Boney Kapoor, Dimple Kadadia

Director: Luv Ranjan

Release date: 8th Mar'23



SHAZAM: FURY OF THE GODS (IMAX)

Cast: Zachary Levi, Marta Milans, Rachel Zegler

Director: David F. Sandberg

Release date: 17th Mar'23



JOHN WICK : CHAPER 4 (IMAX)

Cast: Keanu Reeves, Donnie Yen, Bill Skarsgard

Director: Chad Stahelski

Release date: 24th Mar'23

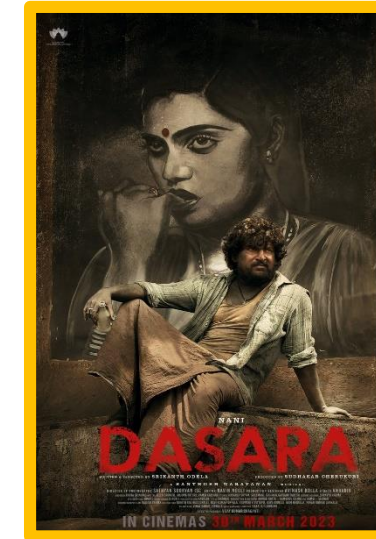


BHOLAA (3D)

Cast: Ajay Devgan, Tabu, Shanjay Mishra, Sharad Kelkar

Director: Dharmendra Sharma

Release date: 30th Mar'23



DASARA (TELUGU)

Cast: Nani, Keerthy Suresh, Samuthirakani

Director: Srikanth Odhela

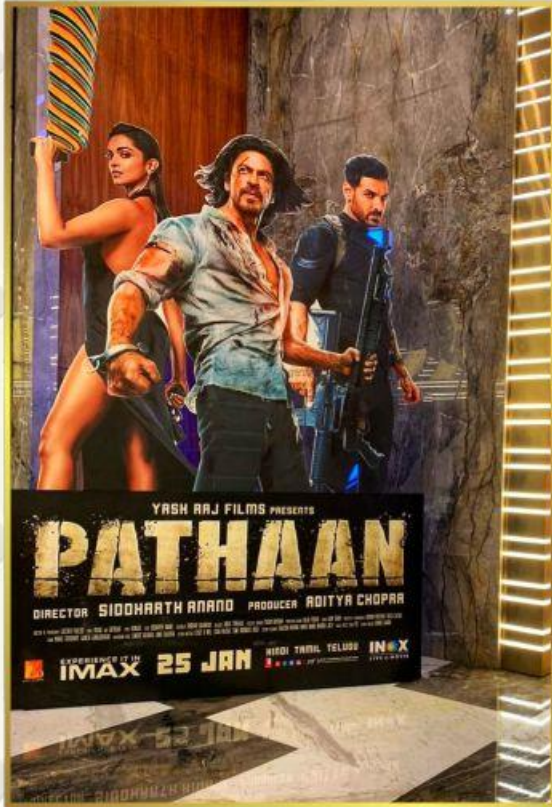
Release date: 30th Mar'23



Enhanced
AUDIENCE
OUTREACH &
ENGAGEMENT

AGGRESSIVE MOVIE MARKETING

MOVIE PROMOTIONS



STAR VISITS



ALTERNATE CONTENT INNOVATION



**COLDPLAY LIVE CONCERT
SCREENING**



**T20 WORLD CUP
LIVE SCREENING**



**FIFA WORLD CUP
LIVE SCREENING**

CASH FLOW PLANNING

CAPEX

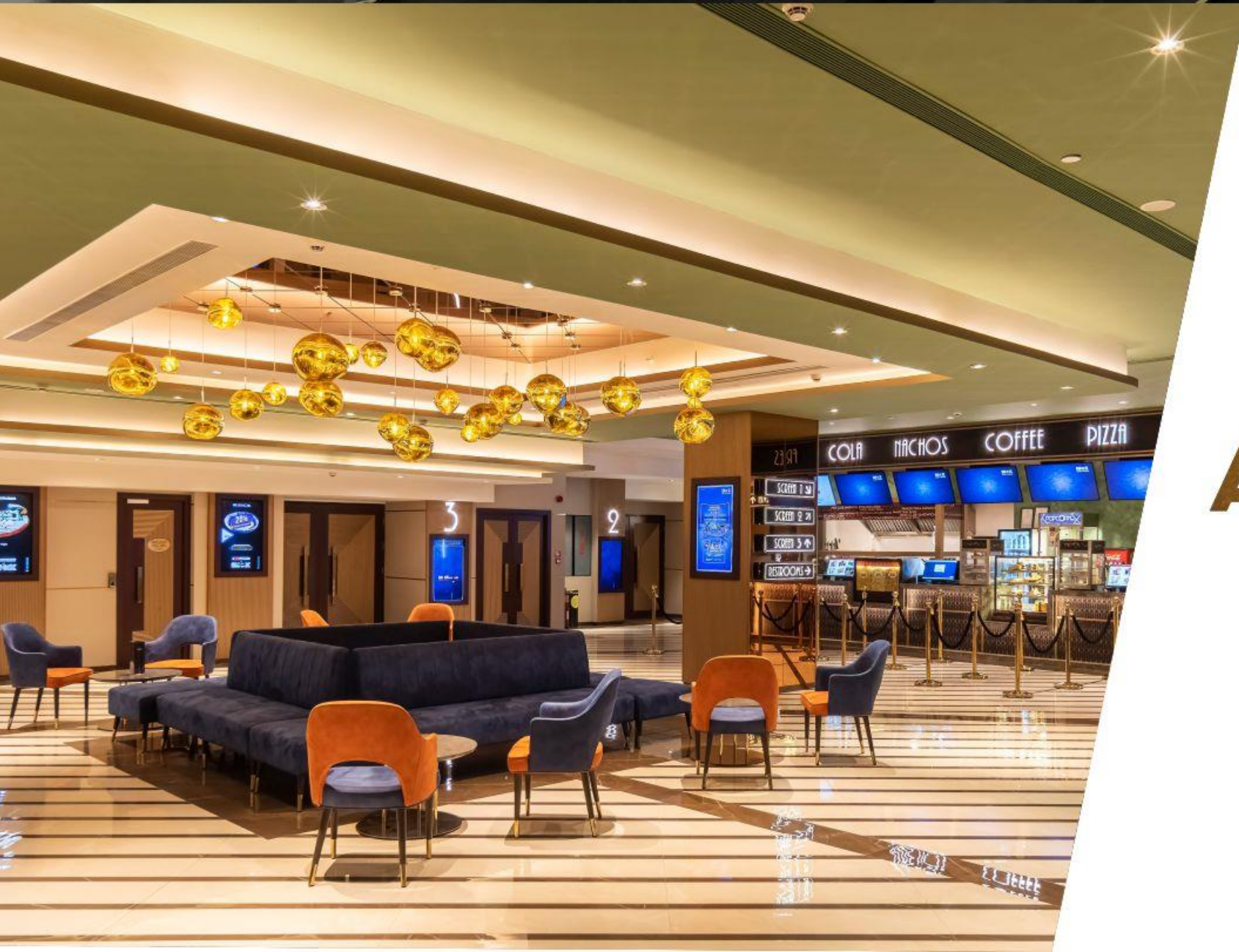
- INOX has organically planned to open 77 screens in FY23 which would be funded through internal accruals
- INOX has proposed to acquire 11 screens of Luxe cinemas which would be funded through a mixture of Debt & Internal Accruals

FUND PLANNING

- The liquidity position is very strong. As on 28th Jan'23, we have ~₹355cr (including undrawn limit of ₹125cr)
- INOX owns 6 cinema properties and a head office. As per market valuation, if required, we can raise close to ₹400 cr by doing a 'sale-lease back' of these properties

DEBT

- As on 28th Jan'23, INOX is 'NET DEBT FREE'
- As on 28th Jan'23, our 'Gross Debt' is ~ ₹162cr.



ANNEXURE

CONSOLIDATED PROFIT & LOSS (INCLUDING INDAS 116)

Particulars [In ₹ Cr]	Q3FY23	Q3FY20	Var %	Q2FY23	QoQ %	9MFY23	9MFY20	YoY %
Total Revenue	522	518	1%	381	37%	1,492	1,538	-3%
Exhibition Cost	132	134	-1%	95	39%	386	403	-4%
Food & Beverages Cost	34	32	6%	26	31%	97	100	-3%
Employee Benefits Expense	32	37	-14%	28	14%	87	109	-20%
Property Rent & CAM	35	32	9%	29	21%	100	94	6%
Power & Fuel, R&M	45	39	15%	48	-6%	142	124	15%
Other Expenses	67	71	-6%	63	6%	195	209	-7%
Total Expenses	345	344	0%	289	19%	1,007	1,039	-3%
EBITDA	176	174	1%	92	91%	485	499	-3%
<i>EBITDA Margin %</i>	<i>34%</i>	<i>34%</i>	<i>0%</i>	<i>24%</i>		<i>33%</i>	<i>32%</i>	
Depreciation & Amortisation	79	65	22%	77	3%	231	190	22%
Finance Cost	69	55	25%	68	1%	202	160	26%
Exceptional Items (Note 1)	24	-		-		24	-	
PBT	4	54	-93%	(53)		27	149	-82%
Current tax	0.02	25	-100%	-		0.02	73	-100%
Deferred tax (Note 2)	45	(5)		(13.09)		51	(20)	
Taxation pertaining to earlier years	(0.09)	-		-		(0.09)	(0.4)	
PAT	(40)	35		(40)		(24)	97	
<i>PAT Margin %</i>	<i>-8%</i>	<i>7%</i>		<i>-10%</i>		<i>-2%</i>	<i>6%</i>	
Basic Earnings Per Share (EPS)	(3.31)	3.56		(3.30)		(1.94)	9.89	

Due to rounding-off, figures presented in the table may not add up precisely to the totals provided. FY21& FY22 were COVID-19 impacted hence Q3/9MFY23 is compared with Q3/9MFY20.

*Figure is less than ₹1 lakh

Note:

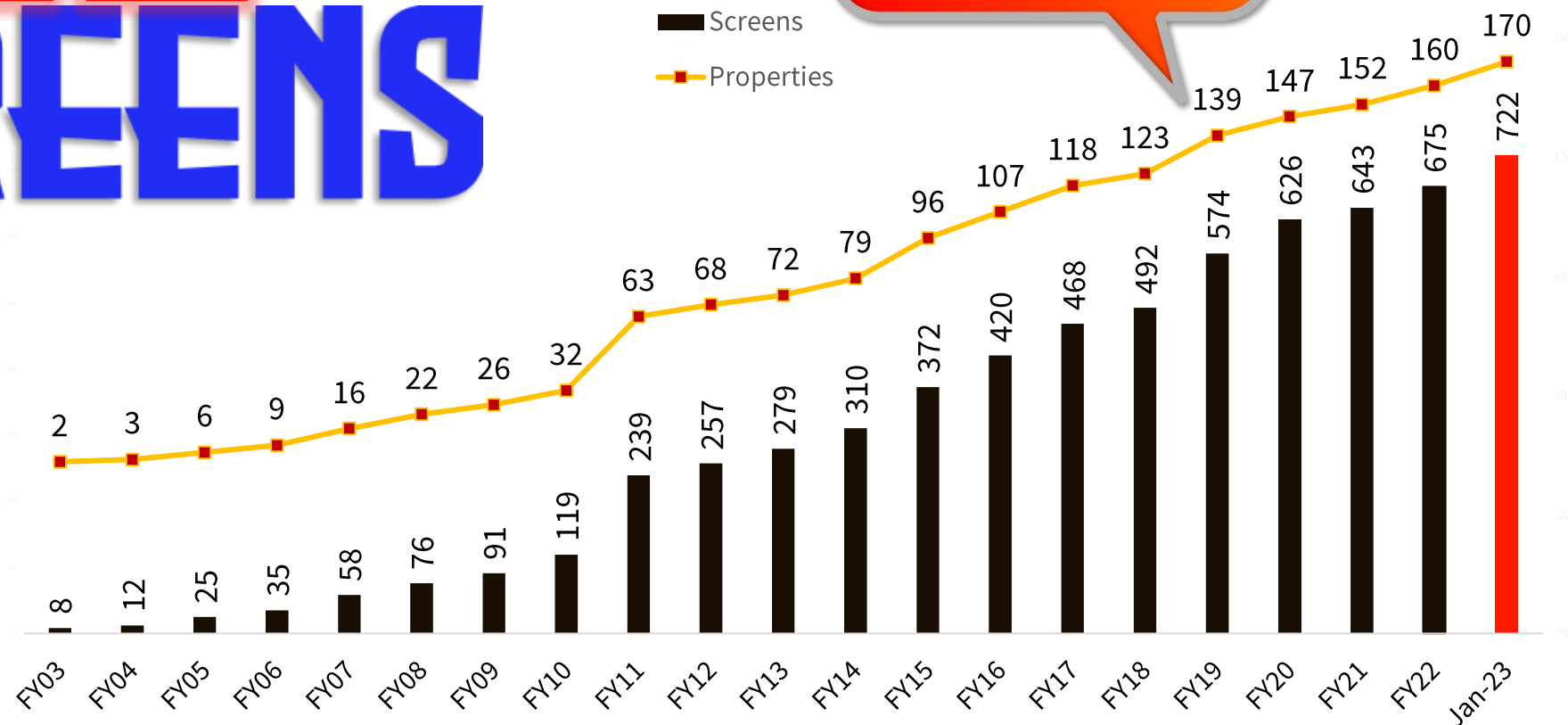
1) Exceptional item during the quarter/period ended 31 December 2022 is towards expenses incurred in connection with the amalgamation.

2) INOX Leisure Limited had recognised deferred tax asset on tax losses comprising of unabsorbed depreciation and business losses as per the Income-tax Act, 1961. These tax losses pertain to financial year 2020-21 and 2021-22, which was consequent to the COVID-19 pandemic and the resultant lockdown. The scheme of amalgamation between INOX Leisure Limited with PVR Limited has been allowed by NCLT and the appointed date is 1st January 2023. In view of the uncertainty involved in respect of allowability of carried forward of business losses of the INOX Leisure Limited by the PVR Limited, after the amalgamation, the Company has written off deferred tax asset of Rs. 43.37 cr in respect of such business loss

TRACK RECORD OF AGGRESSIVE EXPANSION

722 SCREENS

HIGHEST EVER OPENING
SINCE THE INCEPTION OF INOX
85 NEW
SCREENS
ADDED
IN FY19

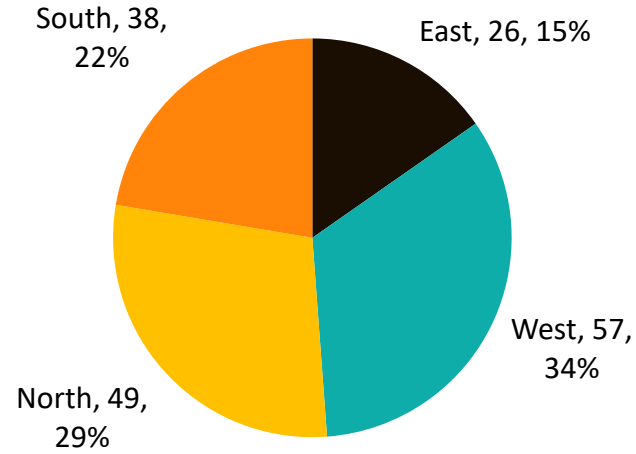


Includes 10 management properties with 35 screens and 8,360 seats

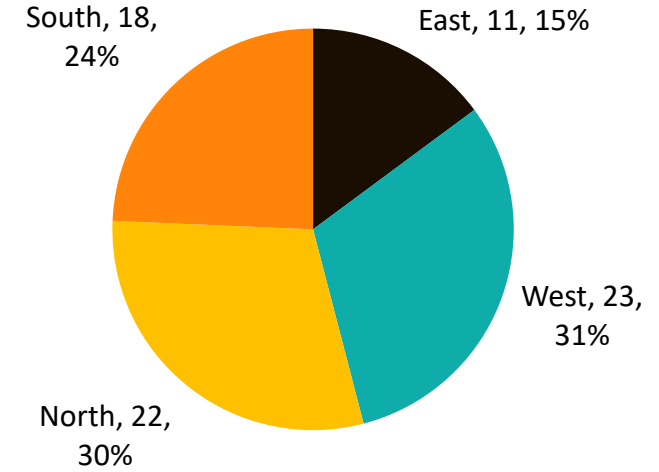
WELL DIVERSIFIED PRESENCE ACROSS INDIA

- WELL DIVERSIFIED DISTRIBUTION OF MULTIPLEXES ACROSS INDIA
- ACCESS TO WIDE VARIETY OF REGIONAL CONTENT
- LOWER DEPENDENCY ON HINDI AND ENGLISH CONTENT

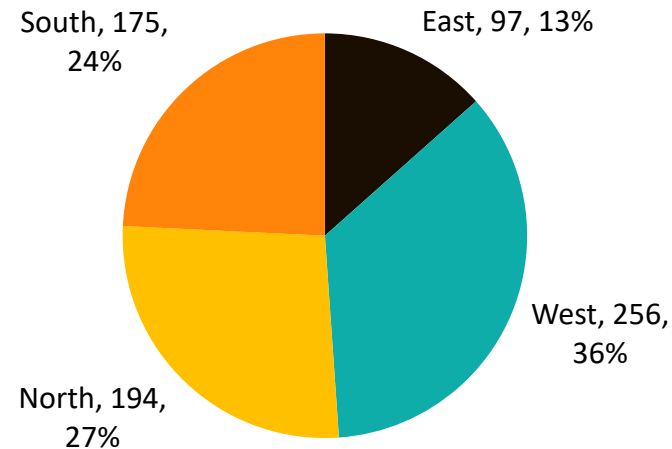
170 Properties



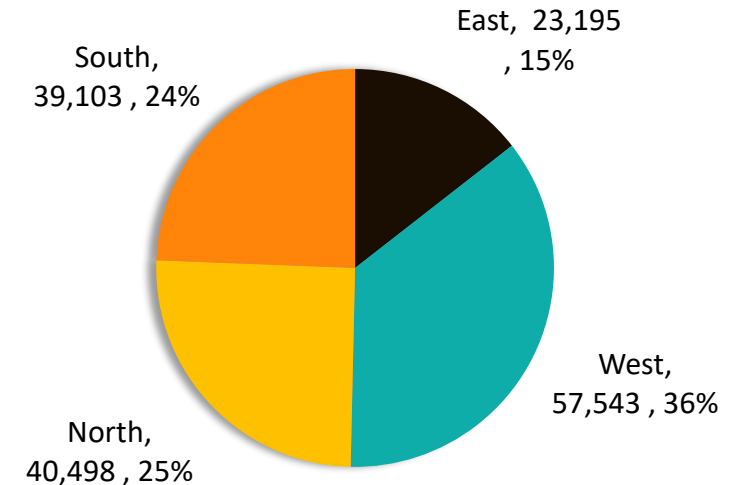
74 Cities



722 Screens



160,339 Seats



Includes 10 management properties with 35 screens and 8,360 seats

INOX
LIVE the MOVIE

OFFICIAL SPONSOR OF THE INDIAN OLYMPIC TEAM



RESULTS
UPDATE Q3&9M FY23

INOX

Thank You

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