

3rd August, 2022

To,

BSE Limited

P J Towers,
Dalal Street,
Mumbai – 400 001

National Stock Exchange of India Limited

Exchange Plaza, 5th Floor, Plot No C/1,
G Block, Bandra-Kurla Complex,
Bandra (East), Mumbai – 400 051

Scrip Code: 532706

Symbol: INOXLEISUR

Dear Sir / Madam,

Sub.: Disclosure of Material Event / Information under Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 – Earnings Presentation.

Pursuant to Regulation 30 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, a copy of the Earnings Presentation that we propose to make during the Conference Call for analyst and investors scheduled to be held on Wednesday, 3rd August, 2022 at 5.30 p.m. is enclosed herewith and the said Earnings Presentation has also been uploaded on the Company's website at <https://www.inoxmovies.com/Corporate.aspx?Section=3>

We request you to kindly take the same on record.

Thanking you.

Yours faithfully,

For INOX Leisure Limited



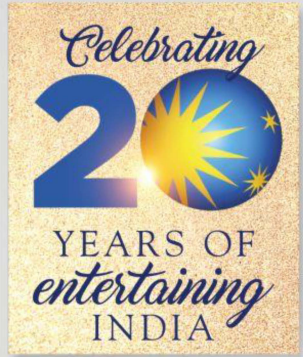
Vishav Sethi

Company Secretary & Compliance Officer

Encl.: a/a.



RESULTS
UPDATE Q1FY23



INOX
LIVE *the* MOVIE

TEAM INDIA


OFFICIAL SPONSOR OF THE INDIAN OLYMPIC TEAM

SHARP FOCUS.
UNDEVIATING ENERGY.



INOX
LIVE the MOVIE



RESULTS
UPDATE Q1FY23

OFFICIAL SPONSOR OF THE INDIAN OLYMPIC TEAM

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There are some important factors that could cause material differences to Company's actual results. These include (i) our ability to successfully implement our strategy (ii) our growth and expansion plans (iii) changes in regulatory norms applicable to the Company (iv) technological changes (v) investment income (vi) cash flow projections etc. The Company, as such, makes no representation or warranty, express or implied, as to, and does not accept any responsibility or liability with respect to, the fairness, accuracy, completeness or correctness of any information or opinions contained herein. The information contained in this Presentation, unless otherwise specified is only current as of the date of this Presentation. The Company assumes no responsibility to publicly amend, modify or revise any forward-looking statements, on the basis of any subsequent development, information or events, or otherwise. Unless otherwise stated in this Presentation, the information contained herein is based on management information and estimates. The information contained herein is subject to change without notice and past performance is not indicative of future results. The Company may alter, modify or otherwise change in any manner the content of this Presentation without obligation to notify any person of such revision or changes.

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SUMMARY

- **Key Highlights**
- **Financial Highlights: Q1FY23**
- **Shareholding Structure**
- **New Property Openings – Q1FY23**
- **Screen Outlook FY23**
- **Movie Pipeline**
- **Enhanced Audience Outreach & Engagement**
- **Cash Flow Planning**
- **Annexure**

Celebrating
20 
YEARS OF
entertaining
INDIA

11TH MAY 2022

20 YEARS AGO, WE STARTED WITH ONE MULTIPLEX &
A DREAM OF BRINGING THE BEST CINEMA EXPERIENCE TO INDIA.
SINCE THEN, WE HAVE REDEFINED WHAT CINEMATIC EXPERIENCE
SHOULD MEAN TO OUR GUESTS, BY OFFERING THEM
THE BEST CINEMA TECHNOLOGY, BRINGING GRANDEUR
AND LUXURY TO EVERY CINEMA SCREEN AND EXPANDING
THE DEFINITION OF CINEMA FOOD.

KEY HIGHLIGHTS Q1 FY23

Only
NATIONAL
Chain
.....TO BE.....
NET DEBT FREE

Highest Ever
TOTAL REVENUE
₹589CR

Highest Ever
EBITDA
₹130CR

Highest Ever
PAT
₹74CR

STRONG
Liquidity
POSITION
~₹250CR
IN CASH & CASH EQUIVALENTS
As on 31st July 2022

Highest Ever
BOX OFFICE
AND
F&B
Collection

Highest Ever
ATP
₹229

Launched
INOX
MERCHANDISE

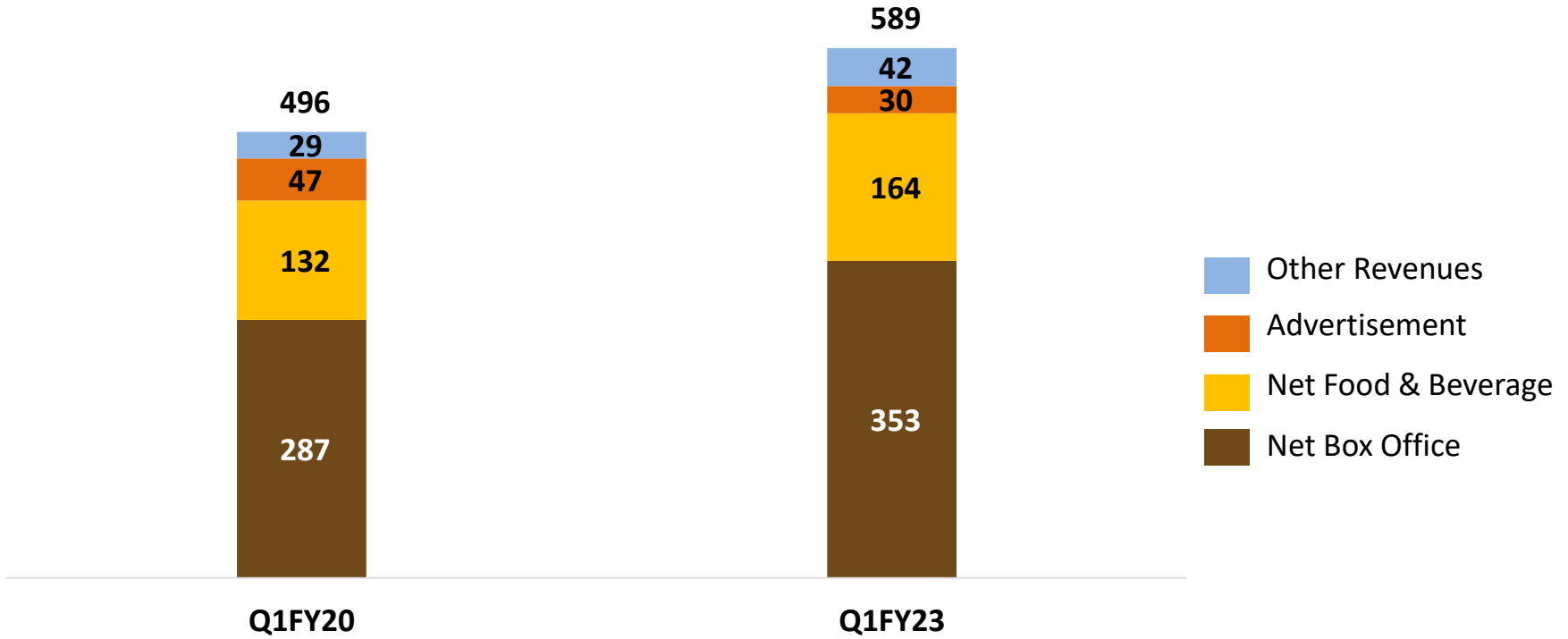
Q1FY23 VS Q1FY20

| | REVENUE | EBITDA* | PAT* |
|---------|-----------------|-----------------|----------------|
| Q1 FY23 | ₹589CR ▲ 19% | ₹130CR ▲ 41% | ₹74CR ▲ 80% |
| Q1 FY20 | ₹496CR | ₹92CR | ₹41CR |

*Excludes Impact of INDAS 116

FY21& FY22 were COVID-19 impacted hence compared with Q1FY20

Q1FY23 vs Q1FY20 (₹ Cr)



Note: FY21& FY22 were COVID-19 impacted hence compared with Q1FY20

| %Share | Q1FY20 | Q1FY23 |
|-----------------------|-------------|-------------|
| Net Box Office | 58% | 60% |
| Net Food & Beverage | 27% | 28% |
| Advertisement | 9% | 5% |
| Other Revenues | 6% | 7% |
| Total Revenues | 100% | 100% |

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

KEY OPERATIONAL METRICS ANALYSIS

Q1FY23 VS Q1FY20

| | FOOTFALLS | OCCUPANCY% | ATP | SPH |
|----------------|------------------------|--------------------|----------------------|---------------------|
| Q1 FY23 | 184Lakh ▲ 6% | 29% ▼ 1% | ₹229 ▲ 16% | ₹96 ▲ 19% |
| Q1 FY20 | 173Lakh | 30% | ₹198 | ₹81 |

Footfalls with management properties is 193lakh/183lakh for Q1FY23/Q1FY20 respectively

FY21& FY22 were COVID-19 impacted hence compared with Q1FY20

IND AS 116 IMPACT ON PROFIT & LOSS

| Consolidated Profit & Loss [In ₹ Cr] | Q1FY23 | | | | Q1FY20 | Q1FY22 | Q4FY22 |
|---|-------------|-------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| | Reported | Ind AS 116 Impact | Without Ind AS 116 | % Change Vs Q1FY20 | Without Ind AS 116 | Without Ind AS 116 | Without Ind AS 116 |
| Total Revenue | 589 | - | 589 | 19% | 496 | 26 | 325 |
| Exhibition Cost | 159 | - | 159 | 22% | 130 | 6 | 92 |
| Food & Beverages Cost | 36 | - | 36 | 9% | 33 | 1 | 20 |
| Employee Benefits Expense | 27 | - | 27 | -23% | 35 | 25 | 23 |
| Property Rent & CAM | 35 | 87 | 122 | 33% | 92 | 74 | 89 |
| Power & Fuel, R&M | 49 | - | 49 | 14% | 43 | 10 | 30 |
| Other Expenses | 65 | 0.12 | 65 | -8% | 71 | 13 | 51 |
| Total Expenses | 372 | 87 | 459 | 14% | 404 | 129 | 304 |
| EBITDA | 218 | -87 | 130 | 41% | 92 | -104 | 21 |
| EBITDA Margin | 37% | | 22% | | 19% | NA | 6% |
| Depreciation & Amortisation | 75 | -46 | 29 | 12% | 26 | 29 | 29 |
| EBIT | 142 | -41 | 101 | 53% | 66 | -132 | -8 |
| Finance Cost | 66 | -63 | 2 | -33% | 3 | 3 | 3 |
| PBT | 76 | 22 | 99 | 57% | 63 | -135 | -10 |
| Current tax | 0.0* | - | 0.0* | | 22 | - | (0.0)* |
| Deferred tax | 19 | 6 | 25 | | 0.3 | -34 | -2 |
| Taxation pertaining to earlier years | - | - | - | | - | - | 4 |
| PAT | 57 | 17 | 74 | 80% | 41 | -101 | -12 |
| PAT Margin | 10% | | 13% | | 8% | NA | -4% |
| Basic Earnings Per Share (EPS) | 4.67 | 1.38 | 6.05 | 44% | 4.19 | -8.85 | -0.96 |

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

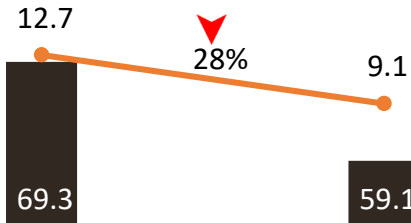
*Figure is less than ₹1 lakh

OPERATIONAL FIXED COST



Employee Benefit Expense (Incl. Agency Manpower)

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

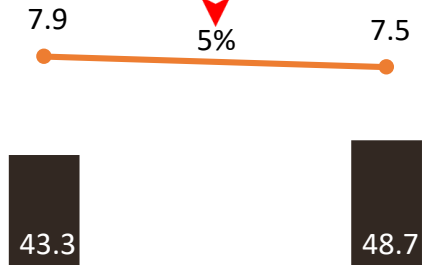


Q1FY20 Q1FY23

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)

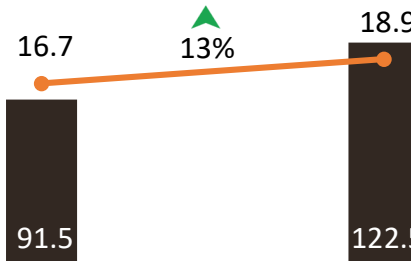


Q1FY20 Q1FY23

Exemplary COST CONTROL

*Rent & CAM

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

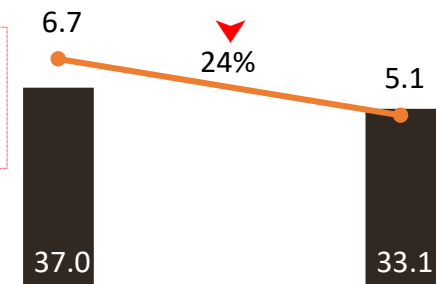


Q1FY20 Q1FY23

Rent & CAM Escalation kicked in as per agreements

Other Overheads

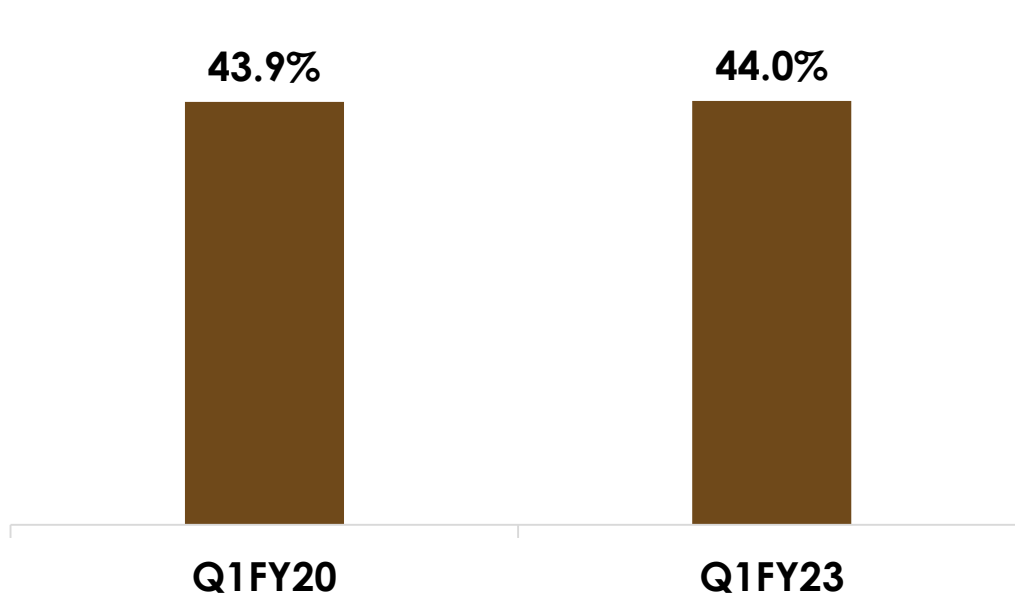
Other Overheads (₹ Cr) Per Screen (₹ lacs)



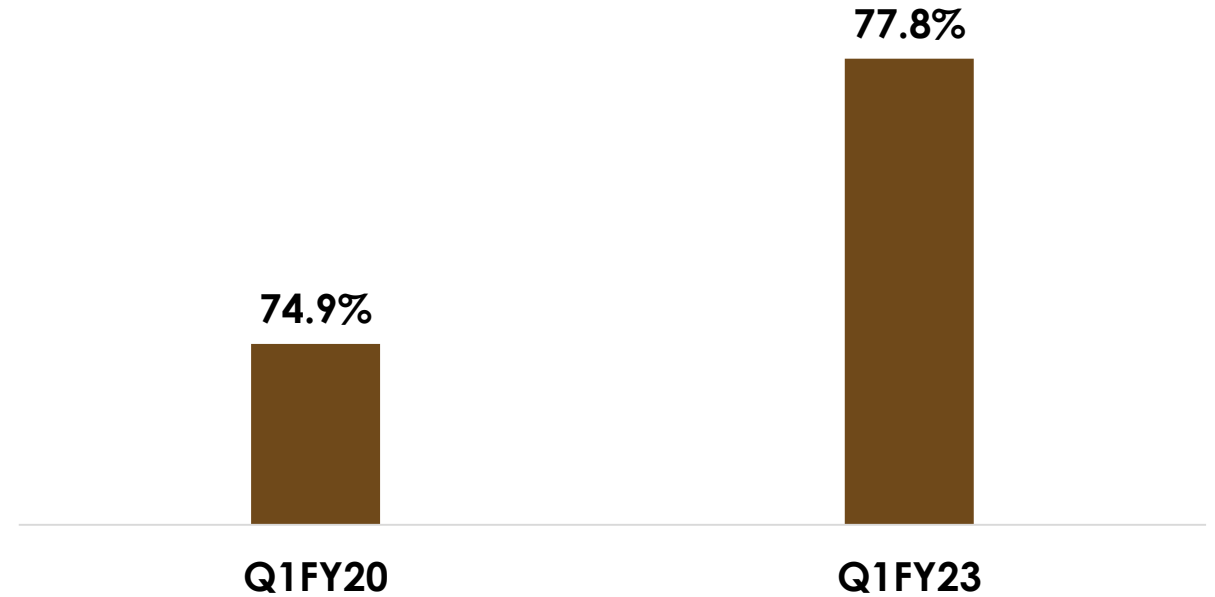
Q1FY20 Q1FY23

* Excludes INDAS 116 Impact
FY21& FY22 were COVID-19 impacted hence compared with Q1FY20

Distributor Share to NBOC%

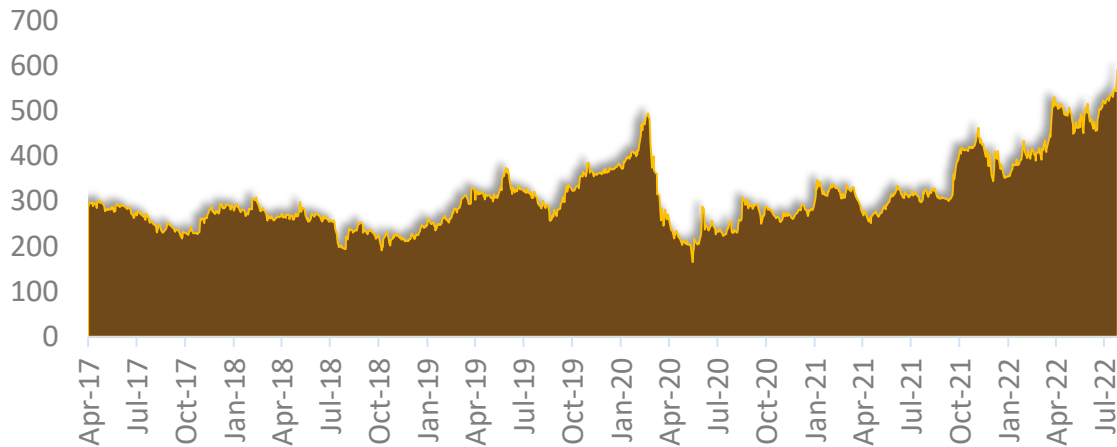


F&B Contribution %

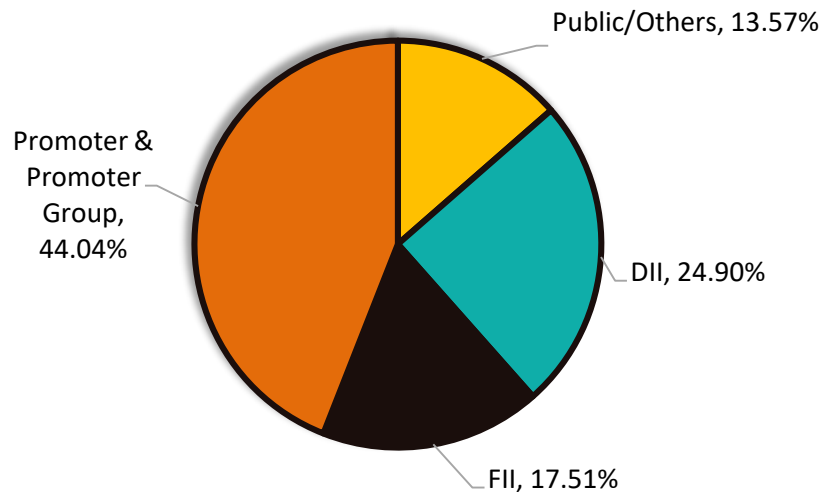


DISTRIBUTOR SHARE IN CONTROL | SIGNIFICANT IMPROVEMENT IN F&B CONTRIBUTION

Share Price Performance



% Shareholding as on 29th Jul 2022



Market Data

As on 29-Jul-22

| | |
|--------------------------------|---------------|
| No. of Shares Outstanding (Cr) | 12.2 |
| Face Value (₹) | 10.0 |
| Price (₹) | 591.65 |
| 52 week High/Low (₹) | 599.15/299.25 |
| Market Capitalisation (₹ Cr) | 7,238 |

Source: BSE

Key Institutional Investors – 29th Jul 2022

%

| | |
|----------------------------------|-------|
| ICICI Prudential | 7.80% |
| HDFC MF | 4.91% |
| Kuwait Investment Authority Fund | 4.70% |
| Aditya Birla Sunlife MF | 3.17% |
| Baroda BNP Pribas | 3.12% |
| Eastspring Investments | 2.54% |
| DSP MF | 2.51% |
| Abu Dhabi Investment Authority | 2.15% |
| Nippon MF | 1.86% |
| Sundaram MF | 1.29% |

Source: Company

AIPL JOY STREET, GURUGRAM

6 SCREENS | 940 SEATS



**OPENED
ON
14TH APRIL
2022**



SATTVA NECKLACE MALL, HYDERABAD

7 SCREENS | 1528 SEATS



**OPENED
ON
6TH MAY
2022**



ORCHID MALL, KALABURAGI

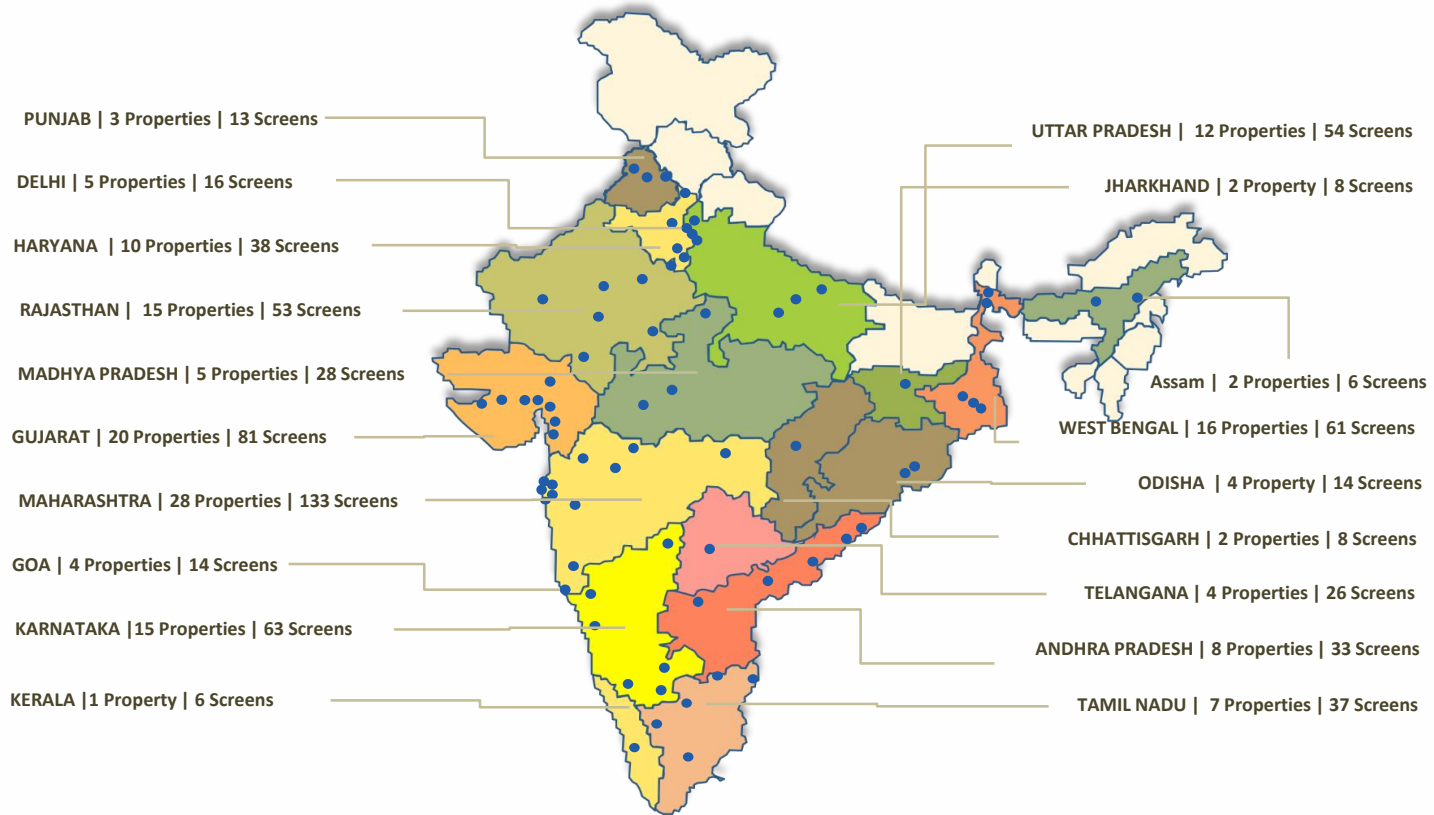
4 SCREENS | 794 SEATS



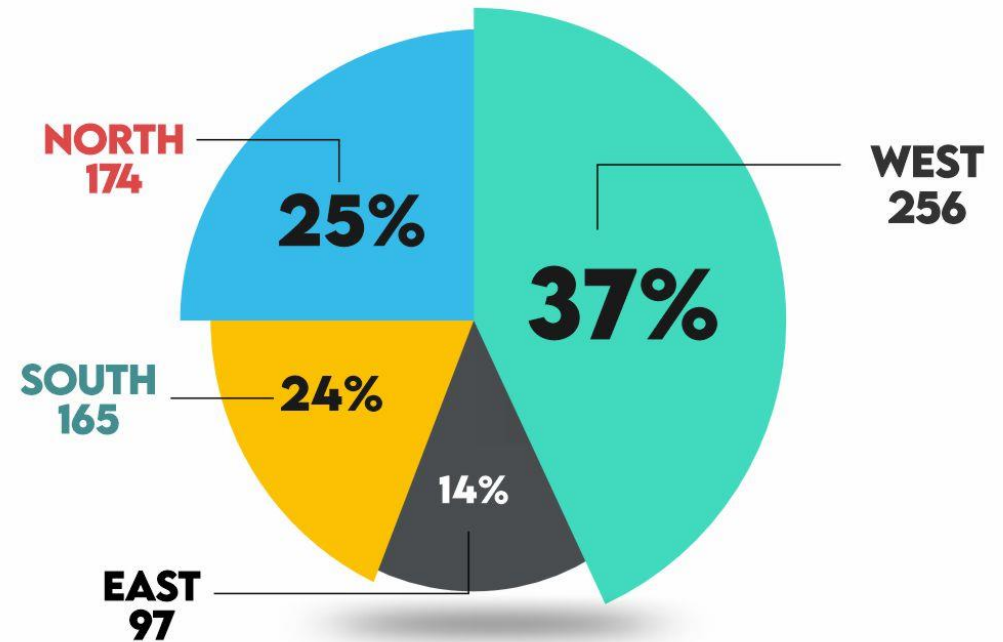
**OPENED
ON
15TH MAY
2022**



PAN INDIA PRESENCE



SCREENS ZONE WISE



Includes 9 management properties with 32 screens and 7,838 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 | 1,528 |
| Kalaburagi Orchid Mall | 15-May-22 | 1 | 4 | 794 |

| | | | | |
|--------------------------------|--|----------|-----------|--------------|
| FY23 Openings till date | | 3 | 17 | 3,262 |
|--------------------------------|--|----------|-----------|--------------|

Upcoming Properties FY23

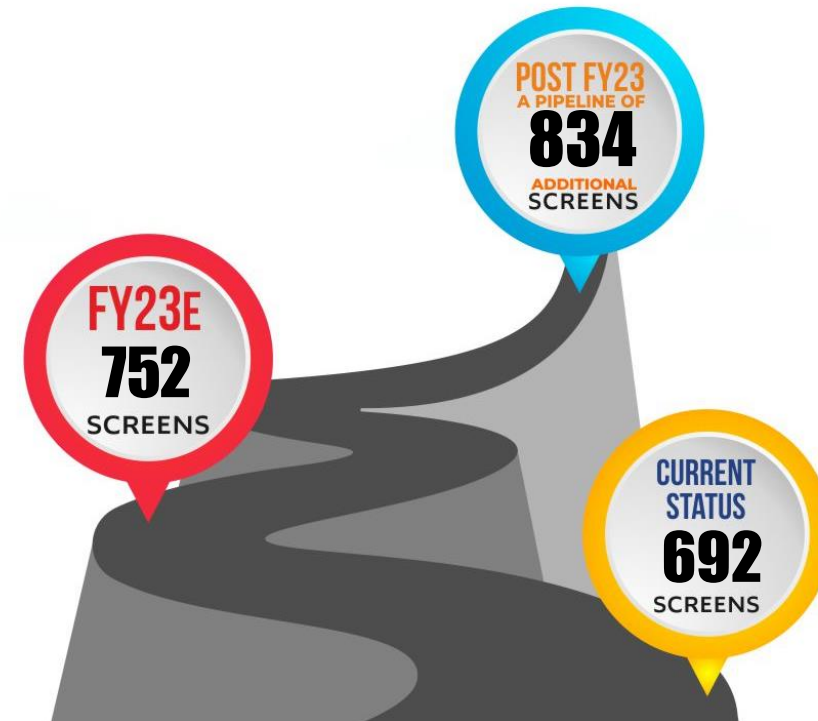
| | | | | |
|------------|--|---|----|-------|
| Vizag | | 1 | 3 | 854 |
| Hyderabad | | 2 | 9 | 2,161 |
| Lucknow | | 1 | 10 | 1,560 |
| Vijayawada | | 1 | 3 | 1,022 |
| Delhi | | 4 | 14 | 2,290 |
| Mysore | | 1 | 4 | 501 |
| Ahmedabad | | 1 | 5 | 1,200 |
| Indore | | 1 | 8 | 1,376 |
| Dharwad | | 1 | 4 | 733 |

| | | | | |
|----------------------------|--|-----------|-----------|---------------|
| Upcoming FY23 total | | 13 | 60 | 11,697 |
|----------------------------|--|-----------|-----------|---------------|

| | | | | |
|--------------------------------|--|-----------|-----------|---------------|
| FY23 Estimated Pipeline | | 16 | 77 | 14,959 |
|--------------------------------|--|-----------|-----------|---------------|

| | Properties | Screens | Seats |
|----------------------------|------------|--------------|----------------|
| Upto FY22 | 160 | 675 | 152,173 |
| [+]FY23 Openings till date | 3 | 17 | 3,262 |
| [+]FY23 Upcoming Openings | 13 | 60 | 11,697 |
| [-] *Reduction | - | - | -217 |
| At the End of FY23 | 176 | 752 | 166,915 |
| Additions Post FY23 | 117 | 834 | 152,353 |
| Leading to | 293 | 1,586 | 319,268 |

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



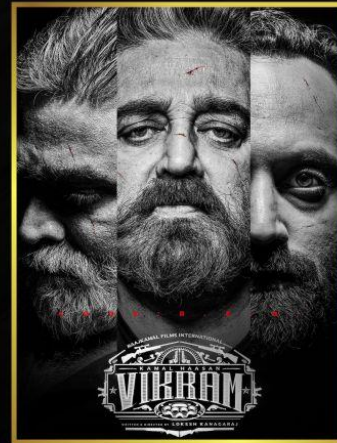
Q1 FY23 Driven by SUPERIOR CONTENT

KGF 2



₹895 Cr*

VIKRAM



₹242 Cr*

BHOOL BHULAIYAA 2



₹186 Cr*

DOCTOR STRANGE
IN THE MULTIVERSE OF MADNESS



₹127 Cr*

*Above figures are All INDIA Net Box Office collection from various Industry Sources.

UPCOMING MOVIE PIPELINE



Bullet Train

Cast: Brad Pitt, Joey King

Director: David Leitch

Release date: 4th Aug'22



DC League Of Super Pets

Cast: Dwayne Johnson, Kevin Hart

Director: Jared Stern

Release Date: 5th Aug'22

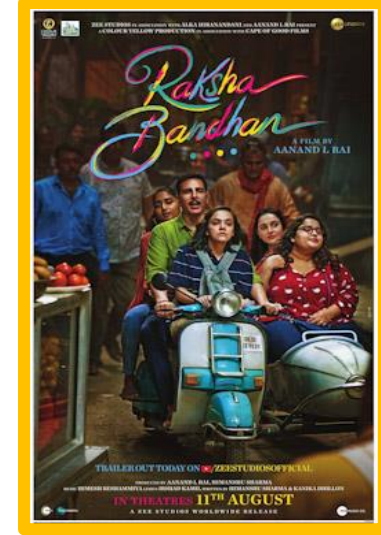


Laal Singh Chaddha

Cast: Aamir Khan, Kareena Kapoor

Director: Advait Chandan

Release Date: 11th Aug'22



Raksha Bandhan

Cast: Akshay Kumar, Bhumi Pednekar

Director: Aanand L. Rai

Release date: 11th Aug'22



Macherla Niyajakavargam

Cast: Nithiin, Krithi Shetty

Director: S R Shekhar

Release date: 12th Aug'22



Thiruchitra MBA [Tamil]

Cast: Dhanush, Rasshi Khanna

Director: Mithran Jawahar

Release date: 18th Aug'22



NOPE

Cast: Daniel Kaluuya, Keke Palmer

Director: Jordan Peele

Release date: 19th Aug'22



LIGER [Telugu]

Cast: Vijay Deverakonda, Anyana Pandey

Director: Puri Jagannadh

Release date: 25th Aug'22



Yaar Mera Titliyaan Warga [Punjabi]

Cast: Gippy
Grewal, Tanu
Grewal

Director: Vikas
Vashisht
Release Date:
2nd Sep'22



Brahmastra Part One : Shiva

Cast: Ranbir
Kapoor, Alia
Bhat

Director: Ayan
Mukherji

Release Date:
9th Sep'22



Vendhu Thanindhathu Kaadu

Cast: Silambarasan T. R.,
Siddhi Idnani

Director: U R Jameel

Release date: 15th Sep'22



Vikram Vedha

Cast: Hrithik
Roshan, Saif Ali
Khan
Director:
Gayatri Pushkar

Release date:
30th Sep'22

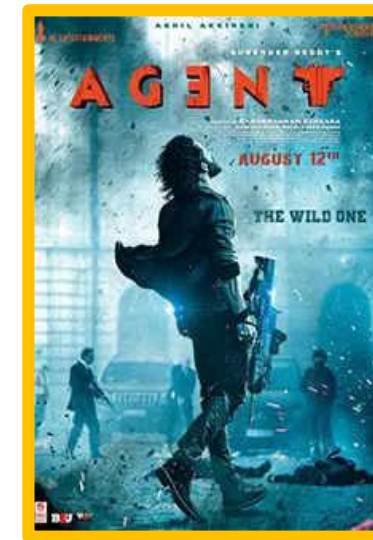


Ponniyin Selvan [Tamil]

Cast: Karthi,
Vikram,
Aishwarya Rai
Bachchan

Director: Mani
Rathnam

Release date:
30th Sep'22



Agent [Telugu]

Cast: Akhil Akkineni
Sakshi Vaidya

Director: Surender Reddy

Release date: 30th Sep'22

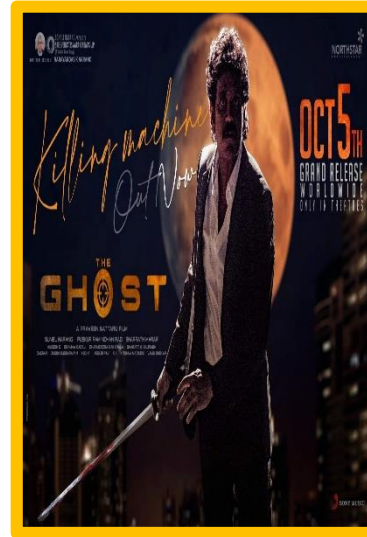


Godfather [Telugu]

Cast:
Chiranjeevi,
Salman Khan,
Nayanthara

Director:
Mohan Raja

Release date:
5th Oct'22

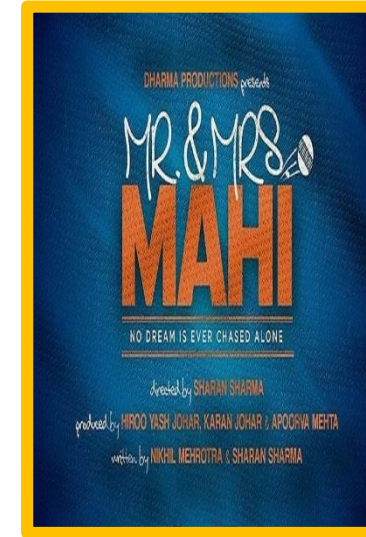


The Ghost [Telugu]

Cast: Nagarjuna
Akkineni, Sonal
Chauhan Gul
Panag

Director:
Praveen Sattaru

Release date:
5th Oct'22



Mr And Mrs Mahi

Cast: Rajkumar
Rao, Janhvi
Kapoor

Director:
Sharan Sharma

Release date:
7th Oct'22

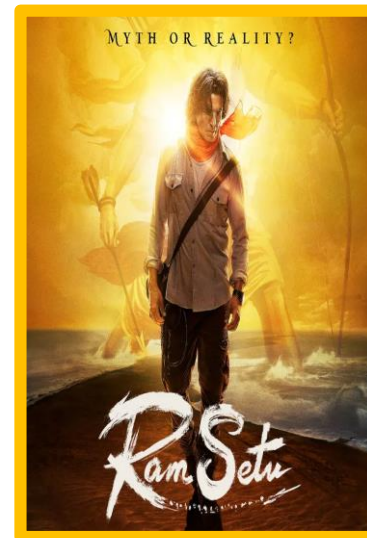


Black Adam (Imax)

Cast: Dwayne
Johnson, Sarah
Shahi, Pierce
Brosnan

Director: Jaume
Collect-Serra

Release date:
21st Oct'22



Ram Setu

Cast: Akshay
Kumar,
Jacqueline
Fernandez,

Director:
Abhishek
Sharma

Release date:
24th Oct'22



Thank God

Cast: Ajay
Devgn, Rakul
Preet Singh,
Siddharth
Malhotra

Director: Indra
Kumar

Release date:
24th Oct'22

INOX
LIVE *the* MOVIE

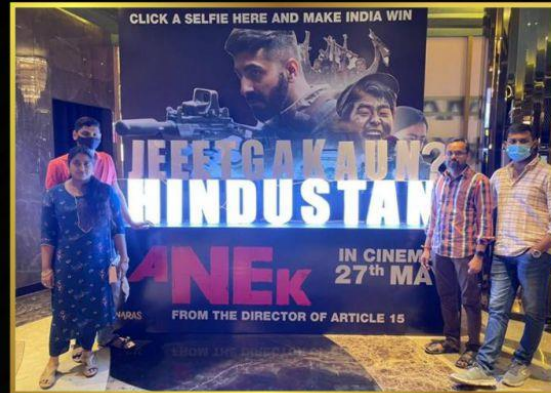


OFFICIAL SPONSOR OF THE INDIAN OLYMPIC TEAM

RESULTS
UPDATE Q1FY23

Enhanced
AUDIENCE
OUTREACH &
ENGAGEMENT

MOVIE PROMOTIONS



STAR VISITS



INOX MERCHANDISE LAUNCH

INOX
LIVE the MOVIE

SHOW OFF YOUR LOVE FOR THE MOVIES

— WITH **INOX** —
MERCHANDISE

LAUNCH OFFER
FLAT 10% OFF
TILL 30TH JUNE

COFFEE MUGS HEADPHONES NOTEBOOKS

PHONE CASES & COVERS AIRPOD CASES COASTERS

T-SHIRTS

Get official Marvel, Disney, DC, Star Wars, MPL, IPL and INOX branded merchandise now.

inox.macmerise.com

Scan Code to Shop

Powered By **macmerise**

TRENDING COLLECTIONS



THOR: LOVE AND THUNDER



DOCTOR STRANGE IN THE MULTIVERSE OF MADNESS



THE BATMAN



ALAN WALKER O

BEST SELLERS



Marvel Comics
Cap Am Ironman Kawaii - Sipper Bottles Set Of 2
Rs. 1,099.00 ~~Rs. 1,798.00~~



Marvel Comics
Strongest Avenger - Female Designer T-Shirt
Rs. 599.00 ~~Rs. 899.00~~



Marvel Comics
Ironman Arc Reactor - Qi Compatible Pro Wireless Charger
Rs. 1,199.00 ~~Rs. 1,999.00~~



Marvel Comics
Minimalistic Deadpool - Coffee Mugs
Rs. 899.00 ~~Rs. 1,499.00~~



Marvel Comics
Endgame Suit Avengers - Decibel Wireless On Ear Headphones
Rs. 1,699.00 ~~Rs. 1,999.00~~

CAPEX

- INOX has planned to open 77 screens in FY23
- All upcoming screens would be funded through internal accruals

FUND PLANNING

- The liquidity position is very strong. As on 31st Jul'22, we have ~₹375 cr (including undrawn limit of ₹125 cr)
- INOX owns 6 cinemas 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 31st Jul'22, INOX is 'NET DEBT FREE'
- As on 31st Jul'22, our 'Gross Debt' is ~ ₹81 cr.



ANNEXURE

CONSOLIDATED PROFIT & LOSS (INCLUDING INDAS 116)

| Particulars [In ₹ Cr] | Q1FY23 | Q1FY20 | Var % | Q1FY22 | Q4FY22 | QoQ % | FY22 |
|---------------------------------------|--------------|--------------|-------------|----------------|---------------|-------------|----------------|
| Total Revenue | 589 | 496 | 19% | 26 | 325 | 81% | 706 |
| Exhibition Cost | 159 | 130 | 22% | 6 | 92 | 73% | 196 |
| Food & Beverages Cost | 36 | 33 | 9% | 1 | 20 | 80% | 43 |
| Employee Benefits Expense | 27 | 35 | -23% | 25 | 23 | 17% | 95 |
| Property Rent & CAM | 35 | 30 | 17% | 19 | 25 | 40% | 75 |
| Rent concessions | - | - | | (23) | (20) | | (145) |
| Power & Fuel, R&M | 49 | 43 | 14% | 10 | 30 | 63% | 84 |
| Other Expenses | 65 | 71 | -8% | 13 | 51 | 27% | 120 |
| Total Expenses | 372 | 343 | 8% | 51 | 219 | 70% | 467 |
| EBITDA | 218 | 153 | 42% | (26) | 106 | 106% | 239 |
| <i>EBITDA Margin %</i> | <i>37.0%</i> | <i>30.8%</i> | | <i>NA</i> | <i>32.6%</i> | | <i>33.9%</i> |
| Depreciation & Amortisation | 75 | 61 | 23% | 73 | 74 | 1% | 294 |
| Finance Cost | 66 | 51 | 29% | 64 | 64 | 3% | 258 |
| PBT | 76 | 42 | 81% | (163) | (32) | | (313) |
| Current tax | 0.0 * | 22 | -100% | - | (0.0)* | | - |
| Deferred tax | 19 | (7) | | (41) | (8) | | (78) |
| Taxation pertaining to earlier years | - | - | | - | 4 | -100% | 4 |
| PAT | 57 | 27 | 111% | (122) | (28) | | (239) |
| <i>PAT Margin %</i> | <i>9.7%</i> | <i>5.4%</i> | | <i>NA</i> | <i>-8.6%</i> | | <i>-33.9%</i> |
| Basic Earnings Per Share (EPS) | 4.67 | 2.75 | 70% | (10.67) | (2.26) | | (19.91) |

*Figure is less than ₹1 lakh

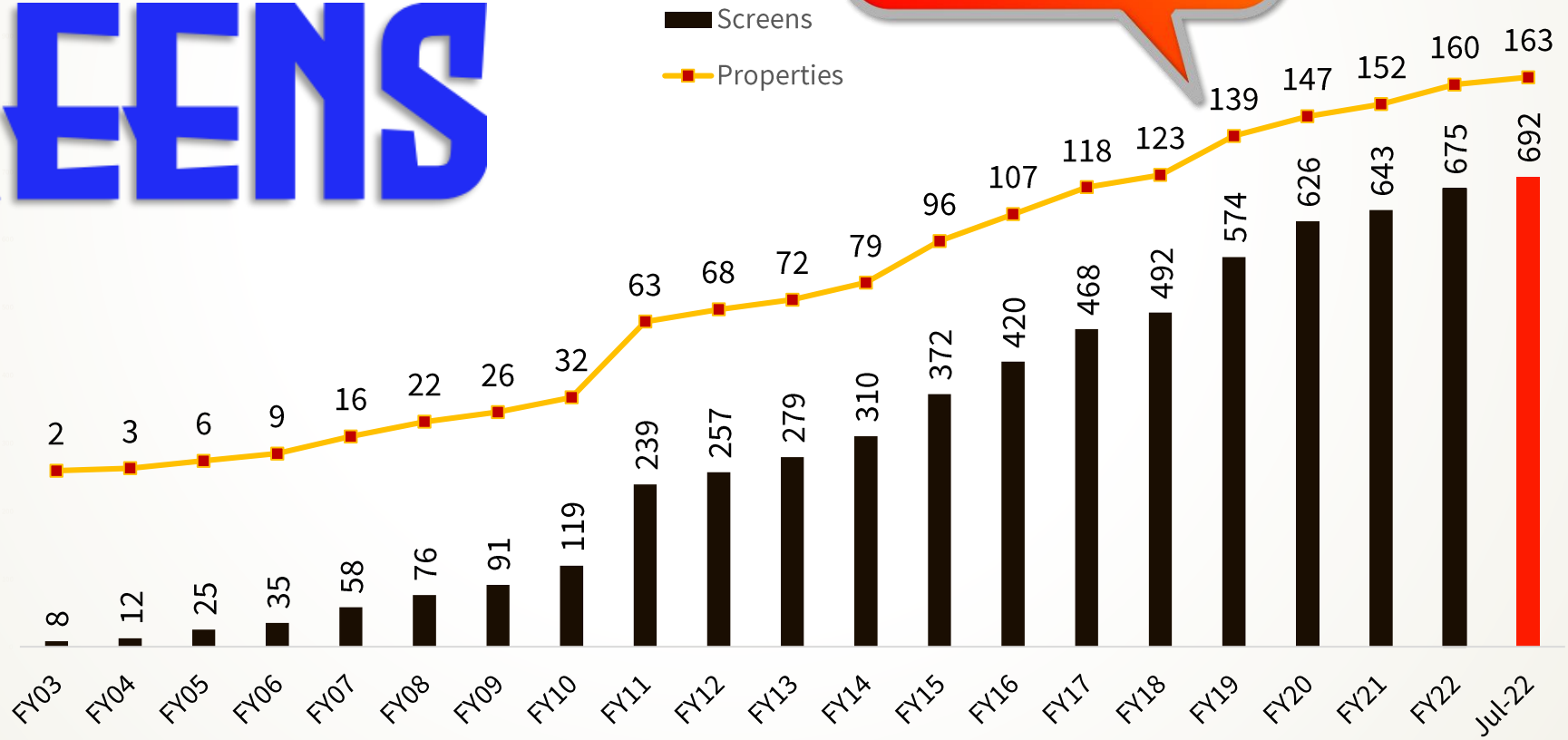
Due to rounding-off, figures presented in the above table may not add up precisely to the totals provided and percentages may not precisely reflect the rounded-off figures.

TRACK RECORD OF AGGRESSIVE EXPANSION

692 SCREENS

HIGHEST EVER OPENING
SINCE THE INCEPTION OF INOX

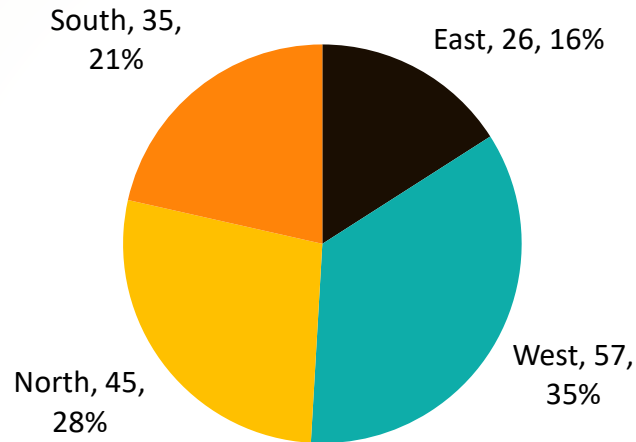
85 NEW
SCREENS
ADDED
IN FY19



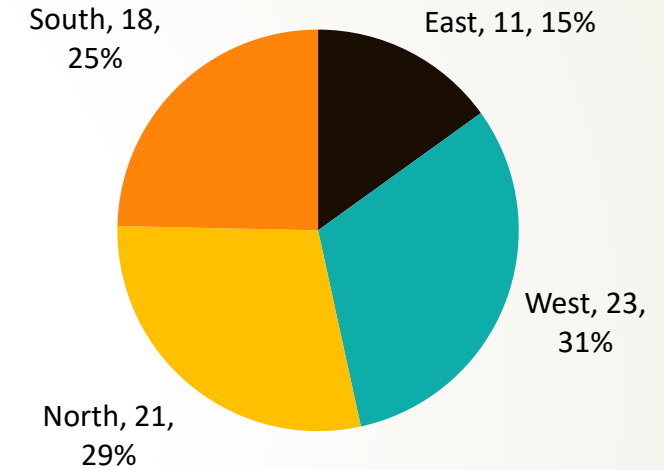
Includes 9 management properties with 32 screens and 7,838 seats

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

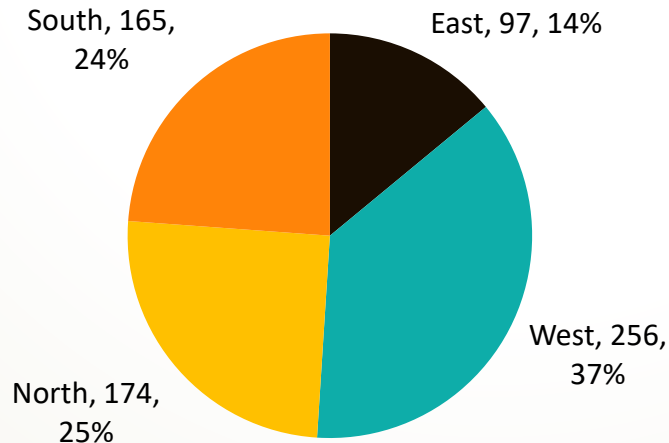
163 Properties



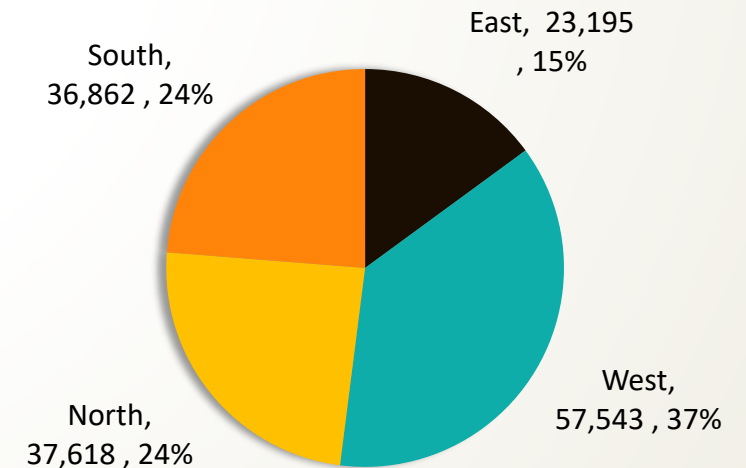
73 Cities



692 Screens



155,218 Seats



Includes 9 management properties with 32 screens and 7,838 seats



Thank You

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