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JFL/NSE-BSE/2016-17/118

The Manager Department of Corporate Services **BSE Limited** 25th Floor, P.J Towers, Dalal Street, Mumbai-400001

Scrip code: 533155

October 26, 2016

The Manager Listing Department **National Stock Exchange of India Limited** Exchange Plaza, Bandra Kurla Complex, Bandra (E), Mumbai- 400051

Symbol: JUBLFOOD

Sub: Press Release alongwith Earnings Presentation for Q2 FY 2017

Dear Sir/Madam,

Please find enclosed herewith the copy of the Press Release dated October 26, 2016 alongwith Earnings Presentation to be issued by the Company.

The Press Release and Earnings Presentation are also being disseminated on Company's website at <u>www.jubilantfoodworks.com</u>.

This is for your information and records.

Thanking you,

For Jubilant FoodWorks Limited

(Moría Aggarwal) Company Secretary cum Compliance Officer

Investor E-mail id: investor@jublfood.com

Encl: A/a

A Jubilant Bhartia Company

Jubilant FoodWorks Limited Corporate Office: 5th Floor, Tower-D, Plot No. 5, Logix Techno Park, Sector-127, Noida - 201 304, U.P, India Tel: +91 120 4090500 Fax: +91 120 4090599

Registered Office: Plot No. 1A, Sector 16-A, Noida - 201 301, U.P., India Tel : +91 120 4090500 Fax: +91 120 4090599 CIN No.: L74899UP1995PLC043677 Email: contact@jublfood.com

JUBILANT FOODWORKS LIMITED



Noida, October 26, 2016

Immediate release

<u>Financial Highlights</u>				
<u>Q2 FY17</u>	<u>H1 FY17</u>			
Total Income at Rs. 6,655 million	Total Income at Rs. 12,745 million			
EBITDA at Rs. 643 million	EBITDA at Rs. 1,220 million			
Net Profit after tax at Rs. 216 million	Net Profit after tax at Rs. 406 million			

Note: 1. *Figures have been rounded off for the purpose of reporting.*

2. Financial discussion throughout this release is based on standalone reporting.

3. The financials of Dunkin' Donuts have been included in the results & related financial discussion.

Jubilant FoodWorks Limited (JFL), India's largest Food Service Company, reported its financial results for the quarter and half year ended 30 September, 2016.

Commenting on the performance for Q2 FY17, Mr. Shyam S. Bhartia, Chairman and Mr. Hari S. Bhartia, Co-Chairman, Jubilant FoodWorks Limited said, "We are pleased to share JFL's improved performance for the quarter, driven by new product innovations such as the launch of Burger Pizza, positive response on pizza mania extreme and continued investments in restaurants. Technology and innovation continue to be our focus areas to achieve operational efficiencies, customer retention and addition. The SAP platform is now well connected across functions and will help fuel growth and generate deeper & precise insights on operational and financial parameters, thereby enabling faster and objective decision making. Additionally, we sharpened our targeted marketing initiatives using predictive analytics tools which have assisted in topline growth. For the Dunkin' brand, we continue to work on optimizing store level profitability, while working on introducing new products and overall cost efficiencies.

Going ahead, we believe we have a great business that we are very excited about and a very solid infrastructure for continued growth."

Commenting on the performance for Q2 FY17, Mr. Ajay Kaul, CEO-cum-Whole time Director, Jubilant FoodWorks Limited said, "Q2 performance has been encouraging for JFL. Our key strengths of innovation, technology and superior reach across regions, have helped JFL deliver positive results in an environment that is pressured by constrained consumer spends.

With our ROI-centric approach towards expansion of restaurants for both our brands, we have successfully grown our network at a healthy pace. Today Domino's Pizza is spread across 251 cities in the country with a network of 1085 restaurants, while Dunkin' Donuts has 73 restaurants across 23 cities.

Going ahead we are committed to executing on our long-term growth strategy and believe there are compelling opportunities ahead as we expand our reach to new and existing customers."

Highlights

	Domino's Pizza	a				
Particulars	Q2 FY17	Q2 FY16	H1 FY17	H1 FY16		
SSG	4.2%	3.2%	0.5%	4.0%		
	Network data					
	Q2 FY17	Q2 FY16	H1 FY17	H1 FY16		
Restaurant at the beginning of the period	1049	911	1026	876		
New Restaurants	32	39	55	74		
Closed restaurants	-	-	-	-		
Restaurants at the end of the period	1081	950	1081	950		
Number of New Cities added	7	8	15	20		
1085 restaurants as of 26 October 2016 across 251 cities						
New cities with 1st restaurant in Q2 FY17						
 Nanded (Maharashtra) Miraj (Maharashtra) Kottayam (Kerala) Huttur Hubli (Karnataka), 	 Suryapet (Telangana) Bettiah (Bihar) Nagaon (Assam) 					
	Online data					
Particulars	Q2 F	Y17	Q2	FY16		
OLO to Delivery Sales %	47	2%	3	86%		
Mobile Ordering sales to OLO %	54	!%	3	80%		
App Download Count (in mn)	5.0 3.5			3.5		
New Product launches during the year						
 Navratra Pizza - Crust made with water chestnut (Singhara) & White Millet (Samak) flour, fresh paneer & mozzarella cheese with rock salt. Burger Pizza- is a result of the Company's focus on innovation and growth and is an attempt to create a new category and bring Pizza-ness in a consumption segment that is addressed by Burgers and Sandwiches 						

Pizza Mania Extremes - offering is an extension of the brands' much loved Pizza Mania range that became a runaway success. Pizza Mania Extremes aims to give value conscious pizza lovers – especially the Pizza Mania loyalists – a culinary experience by providing them a new menu packed with rich tastes, at an economical price point

* "Same store growth" (SSG) refers to the year-over-year growth in sales for restaurants in operation for 2 whole years (i.e. current & previous year)

Dunkin' Donuts							
Particulars	Q2 FY17	Q2 FY16	H1FY17	H1FY16			
	Network data						
Restaurants at beginning of period	77	59	71	54			
New restaurants	1	7	8	12			
Closed restaurants	5	-	6	-			
Restaurants at end of period	73	66	73	66			
City Count	23	23	23	23			
73 restaurants as of 26 October 2016 across 23 cit	ies						
New Produ	uct launches dur	ing the year					
 Donut Cakes – New era Dunkin' Donut cakes revel in the indulgence of chocolate in three glorious variants. Choco Strawberry for a playfully sweet strawberry twist. Choco Rum & Raisins for a heady mix of flavorful fun. And Double Choco Chips for that extra, extra choco kick. Part donut, part cake, wholly sweet. 100% eggless 							
• DunkyDoos- is the newest range of donuts that embodies fun and exuberance for the younger audience. Range of 6 donuts priced at Rs.199 plus applicable taxes							
• Big Joy Burger - is an outcome of delivering the differentiated and delightful Dunkin' burger experience for the value conscious customers at an economical price point							

Result Analysis (All figures as per Ind-AS)

Total revenue in Q2 FY17 was at Rs. 6,655 million.

- Revenues showed improvement on the back of enhanced volumes and positive same store sales growth, driven by;
 - o Network extension into existing and new cities and towns
 - Menu additions such as Burger Pizza and Pizza Mania Extremes
 - Targeted promotional measures
 - Benefit of extensive online/mobile presence
- Domino's SSG during the period was at 4.2%

Total Expenditure in Q2 FY17 stood at Rs. 6,013 million, up 14%. This was the result of;

- Rise in employee cost due to increase in restaurant network and annual increments. This increase was offset by efficiency gains due to deployment of six sigma techniques and impact of increase in OLO business
- Increase in rental expenses as per escalation agreement and increased network
- Increment in other expenses as a result of heightened marketing and promotions in order to drive sales including the introduction of burger pizza
- Total number of employees as on 30 September 2016 stood at 28,321 as against 29,169 as on 30 September 2015. The reduction in headcount is result of a continuous focus on improving and enhancing productivity of every resource.

EBITDA in Q2 FY17 was at Rs. 643 million

• EBITDA performance stands constrained due to the challenging operating environment

- Gross Margins reflect the impact of higher promotional activates in order to enhance customer engagement
- Rise in rental expenses and other manufacturing expenses further burdened EBITDA during the quarter

Profit after Tax in Q2 FY17 stood at Rs 216 million

• PAT is reflective of the curbed revenue growth and impact of higher promotional activities on gross margins in the quarter on account of weak consumer sentiment

JFL's Outlook

ROI focused expansion

- Pace of expansion to be strongly governed by ROI parameters
 - For FY17, target of around 130 new Domino's Pizza and around 15 new Dunkin' Donuts
 - o Successfully opened 59 Domino's Pizza and 8 Dunkin' Donuts' restaurants thus far

Enhance use of technology

• Online and mobile ordering expected to gain further traction and continue meaningfully to overall performance

Continuous investments for development of supply chain & manufacturing capabilities

- Strengthen infrastructure to support growth and capitalize demand
- Progress on construction of Greater Noida mega commissary as per plan

Brand development

• Enhance brand equity through continuous efforts towards remaining relevant and given customers a delightful brand experience

Driving Innovation initiatives

• Innovation stands as a key component of business DNA and plays an important role in creating a unique advantage

Business goals aligned to long term vision

• Efforts to further strengthen business foundation will continue in order to best capitalize sector potential

Key achievements and awards received during the quarter

- Domino's Pizza has won the "Best Customer Service Award" at the Indian Restaurant Awards 2016, organized by Franchise India.
- Dunkin' Donuts has won
 - "National Award Excellence In Customer Service & Loyalty in the Category of Café Restaurant" at Global Awards for Excellence in Quality Management & Leadership organized by World Quality Congress.

- "Asian Award for Best in Quality Service" at 7th Asian Best Employer Brand Award 2016 organized jointly by World HRD Congress.
- "National Award Best Customer Service by a Café Restaurant" at Indian Restaurants Awards 2016 organized by Franchise India.
- "Food Safety Excellence Award" at the Dunkin' International Middle East Rally Awards 2016 organized by Dunkin' International.
- India CSR world's popular CSR newswire under its '3rd Annual CSR Awards Ceremony' honored Jubilant FoodWorks Ltd for its significant contribution to society. The awards were won in two main categories Sanitation – Swacch Bharat Abhiyan (Clean our Neighborhood program) and Road Safety.

About Jubilant FoodWorks Ltd:

Jubilant FoodWorks Limited (JFL/Company) is part of Jubilant Bhartia group and India's largest food service company, with a network of 1085 Domino's Pizza restaurants across 251 cities (as of October 26, 2016). The Company & its subsidiary have the exclusive rights to develop and operate Domino's Pizza brand in India, Sri Lanka, Bangladesh and Nepal. At present it operates in India and Sri Lanka. The Company also has exclusive rights for developing and operating Dunkin' Donuts restaurants for India and has launched 73 Dunkin' Donuts restaurants across 23 cities in India (as of October 26, 2016).

Corporate Identification No: L74899UP1995PLC043677 Investor e-mail id: investor@jublfood.com Regd Office: Plot 1A, Sector 16A, Institutional Area, Noida-201301, U.P. Corporate Office: 5th Floor, Tower D, Plot No. 5, Logix Techno Park, Sector 127, Noida 201304, U.P. Website: <u>www.jubilantfoodworks.com,www.dominos.co.in</u>, <u>www.dunkinindia.com</u>

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Disclaimer

Certain statements in this document may be forward-looking statements. Such forward-looking statements are subject to certain risks and uncertainties like government actions, local political or economic developments, technological risks, and many other factors that could cause our actual results to differ materially from those contemplated by the relevant forward-looking statements. JFL will not be in any way responsible for any action taken based on such statements and undertakes no obligation to publicly update these forward-looking statements to reflect subsequent events or circumstances.



Q2 & H1 FY17 Earnings Presentation

26 October - 2016

Overview



Continued expansion

Enhance customer reach

- Restaurant network
 expansion
- Technology-based accessibility

Capitalise potential - in the chained FSI which is poised to grow at a healthy rate





Exclusive franchise for Domino's Pizza and Dunkin' Donuts

Domino's Pizza- "Yeh Hai Rishton ka time" - for focussed on relationships and bonding and aimed at strengthening the emotional connect with consumers

Dunkin' Donuts & More- Get your Mojo back -focused on the urban youth consumer

New product development

 Keep developing & offering new/ wide range of products to build excitement and enrich culinary experience of customers

Talented & motivated workforce



- Employee empowerment
- Training & development
- Reward and recognition
- Career progression

Robust processes & infrastructure

- Hub-and-Spoke commissary arrangement
- Uninterrupted cold-chain
- Intensive site selection process for new restaurants
- Consistency of quality
- · Joint utilisation of commissaries for both brands
- Deploying Six Sigma & SAP systems





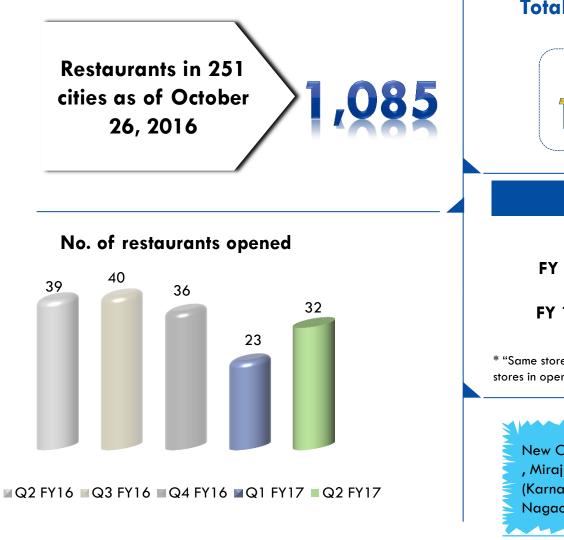
Sustained Profitability

- Vision to drive long term growth and profitability
- Leveraging and building infrastructure and brand equity to capitalise on future potential
- Corporate governance



Highlights - Domino's Pizza





Total number of restaurants (as of)



Same Store Growth (SSG) %					
	Q2	H1			
FY 17	4.2%	0.5%			
FY 16	3.2%	4.0%			

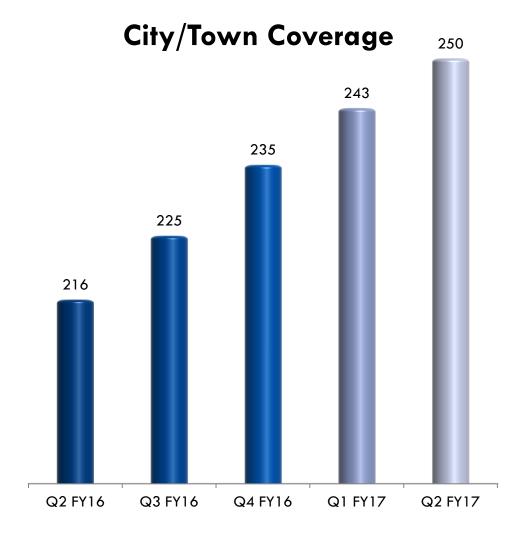
* "Same store growth" (SSG) refers to the year-over-year growth in restaurants for stores in operation for 2 whole years (i.e. current & previous year)

New Cities entered in Q2 FY17: Nanded (Maharashtra) , Miraj (Maharashtra) , Kottayam (Kerala), Huttur Hubli (Karnataka), Suryapet (Telangana) , Bettiah (Bihar), Nagaon (Assam)



Highlights - Domino's Pizza – Restaurant Network





States/Union Territory	Cities	Restaurants
Maharashtra	27	220
Uttar Pradesh	22	76
Haryana	19	52
Gujarat	19	75
Punjab	19	45
Karnataka	15	123
Madhya Pradesh	15	39
Tamil Nadu	12	75
Rajasthan	11	24
Seemandhra	10	18
Bihar	9	17
Uttranchal	9	14
West Bengal	9	58
Himachal Pradesh	8	8
Chhatisgarh	7	15
Kerala	7	18
Assam	6	14
Odisha	6	10
Jharkhand	5	9
Telangana	3	55
Jammu & Kashmir	2	4
Sikkim	2	2
Arunachal Pradesh	1	1
Chandigarh	1	7
Dadra And Nagar Haveli	1	1
Daman	1	1
Goa	1	11
Meghalaya	1	2
New Delhi	1	85
Puducherry	1	2
Grand Total	250	1,081



New Launches - Domino's Pizza



Navratra Menu



The latest innovative offering includes a 100% Vegetarian Pizza, Sago Pudding and Sabudana Crispies. This is in line with the festive season on Navratra, where there is significant reduction in consumption of non-

vegetarian food



Pizza Mania Extremes



Pizza Mania Extremes - offering is an extension of the brands' much loved Pizza Mania range that became a runaway success. Pizza Mania Extremes aims to give value conscious pizza lovers – especially the Pizza Mania loyalists – a culinary experience by providing them a new menu packed with rich tastes, at an economical price point

Burger Pizza

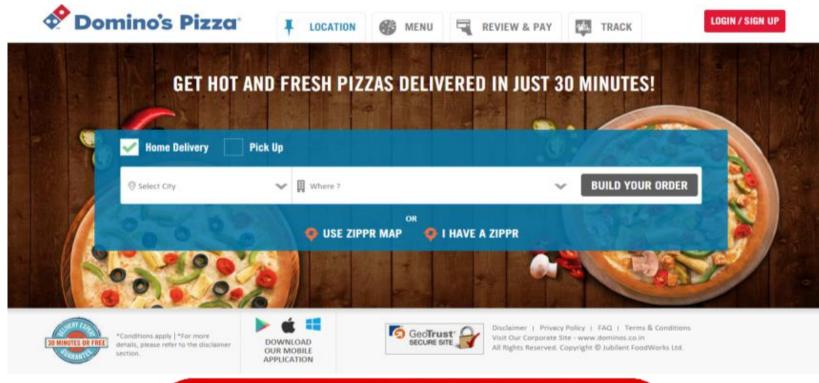
Burger Pizza- is a result of the Company's focus on innovation and growth and is an attempt to create a new category and bring Pizza-ness in a consumption segment that is addressed by Burgers and Sandwiches





The OLO Connect





CLICK TO ORDER ONLINE

	Q2 FY16	Q3 FY16	Q4 FY16	Q1 FY17	Q2 FY17
Average OLO contribution to delivery sales	36%	36%	41%	44%	47%
Mobile Ordering sales contribution to overall OLO	30%	38%	38%	41%	54%
Downloads of mobile ordering app	3.5 mn	3.7 mn	3.9 mn	4.4 mn	5.0 mn





Dunkin' Donuts & more - All Day Part Menu









Restaurants as on 26 October 2016 across 23 cities

Network data		
Particulars	Q2 FY17	Q2 FY16
Restaurants at beginning of period	77	59
New restaurants	1	7
Closed restaurants	5	-
Restaurants at end of period	73	66
City Count	23	23





New Launches– Dunkin' Donuts





DunkyDoos- is the newest range of donuts that embodies fun and exuberance for the younger audience. Range of 6 donuts priced at Rs.199 plus applicable taxes





New era Dunkin' Donut cakes revel in the indulgence of chocolate in three glorious variants. Choco Strawberry for a playfully sweet strawberry twist. Choco Rum & Raisins for a heady mix of flavorful fun. And Double Choco Chips for that extra, extra choco kick. Part donut, part cake, wholly sweet. 100% eggless

Big Joy Burgers

Big Joy Burger - is an outcome of delivering the differentiated and delightful Dunkin' burger experience for the value conscious customers at an economical price point



Management Views



Commenting on the performance for Q2 FY17, Mr. Shyam S. Bhartia, Chairman and Mr. Hari S. Bhartia, Co-Chairman, Jubilant FoodWorks Limited said, "We are pleased to share JFL's improved performance for the quarter, driven by new product innovations such as the launch of Burger Pizza, positive response on pizza mania extreme and continued investments in restaurants. Technology and innovation continue to be our focus areas to achieve operational efficiencies, customer retention and addition. The SAP platform is now well connected across functions and will help fuel growth and generate deeper & precise insights on operational and financial parameters, thereby enabling faster and objective decision making. Additionally, we sharpened our targeted marketing initiatives using predictive analytics tools which have assisted in topline growth. For the Dunkin' brand, we continue to work on optimizing store level profitability, while working on introducing new products and overall cost efficiencies.

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Result Highlights



During the current quarter, the Company has implemented Ind AS accounting standard, as applicable.

Particulars (Rs. mn)	Q2 FY17	Q2 FY16	Growth %	H1 FY17	H1 FY16	Growth %
Income from Sales	6,654	5,873	13.3%	12,742	11,579	10.0%
Other Operating Income	1	2	-53.2%	3	3	-22.6%
Total Income	6,655	5,875	13.3%	12,745	11,582	10.0%

• Revenues showed improvement on the back of enhanced volumes and positive same store sales growth, driven by;

- Network extension into existing and new cities and towns
- Menu additions such as Burger Pizza and Pizza Mania Extremes
- Targeted promotional measures
- Benefit of extensive online/mobile presence
- Domino's SSG during the period was at 4.2%

Particulars (Rs. mn)	Q2 FY17	Q2 FY16	Growth %	H1 FY17	H1 FY16	Growth %
Raw Material and Provisions Consumed	1,677	1,402	1 9.6 %	3,091	2,789	10.8%
Personnel Expenses	1,502	1,418	5.9%	2,903	2,692	7.8%
Rent	728	608	19.7%	1,445	1,211	19.4%
Other Expenses	2,106	1,844	14.2%	4,086	3,614	13.1%
Total Expenditure	6,013	5,271	14.1%	11,525	10,305	11.8%

- Total expenditure increased on account of
 - Rise in employee cost due to increase in restaurant network and annual increments. This increase was offset by efficiency gains due to deployment
 of six sigma techniques and impact of increase in OLO business
 - Increase in rental expenses as per escalation agreement and increased network
 - Increment in other expenses as a result of heightened marketing and promotions in order to drive sales including the introduction of burger pizza

Total number of employees as on 30 September 2016 stood at 28,321 as against 29,169 as on 30 September 2015. The reduction in headcount is result of a continuous focus on improving efficiency and enhancing productivity of every resource.





Particulars (Rs. mn)	Q2 FY17	Q2 FY16	Growth %	H1 FY17	H1 FY16	Growth %
EBITDA	643	604	6.5%	1,220	1,277	-4.5%
Margins	9.7%	10.3%	(62) Bps	9.6%	11.0%	(145) Bps

• EBITDA performance stands constrained due to the challenging operating environment

- Gross Margins reflect the impact of higher promotional activates in order to enhance customer engagement
- Rise in rental expenses and other manufacturing expenses further burdened EBITDA during the quarter

Particulars (Rs. mn)	Q2 FY17	Q2 FY16	Growth %	H1 FY17	H1 FY16	Growth %
PBT	320	326	-2.0%	602	737	-18.3%
Margins	4.8%	5.6%	(75)Bps	4.7%	6.4%	(164) Bps
PAT	216	219	-1.4%	406	494	-18.0%
Margins	3.2%	3.7%	(48) Bps	3.2%	4.3%	(109) Bps

• PAT reflects the impact of curbed revenue growth and higher promotional activities on gross margins in the quarter on account of weak consumer sentiment





Ind AS Reconciliation



	Profit Reconciliation				
Particulars (Rs. mn)	Quarter ended Sep. 30, 2015	Half Year ended Sep. 30, 2015	Year ended March 31, 2016		
Net Profit as reported under Previous GAAP	239	534	1,146		
Effects of transition to Ind AS					
Actuarial Gain/(Loss) on employee defined benefit plan	(5)	(9)	(19)		
Impact of discounting of Security deposit					
- Rent Expense (net of Straight lining)	(9)	(18)	(39)		
- Other Income	13	26	52		
Employee stock option Scheme measured at Fair Value	(19)	(38)	(76)		
Income Tax (including deferred tax)	-	-	2		
Provision for proposed dividend and tax thereon	-	-	-		
Net Profit/(loss) for the Quarter/year ended under Ind AS and Reserves	219	494	1,066		
Other Comprehensive Income/(expense) (net of taxes)	3	6	13		
Total Comprehensive Income under Ind AS as reported	222	500	1,079		



Outlook





ROI focused expansion

- Pace of expansion to be strongly governed by ROI parameters
 - For FY17, target of around 130 new Domino's Pizza and around 15 new Dunkin' Donuts
 - Successfully opened 59 Domino's Pizza and 8 Dunkin' Donuts' restaurants thus far



Enhance use of technology

• Online and mobile ordering expected to gain further traction and continue meaningfully to overall performance



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Brand development

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Driving Innovation initiatives

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Business goals aligned to long term vision

• Efforts to further strengthen business foundation will continue in order to best capitalize sector potential







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Website: <u>www.jubilantfoodworks.com,www.dominos.co.in</u>, <u>www.dunkinindia.com</u>

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