

23<sup>rd</sup> January, 2020

**National Stock Exchange of India Limited**

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**Company Code: PVR / 532689**

**Sub: Quarter 3 – Investor Presentation for F.Y. 2019-20**

Dear Sir / Madam,

Please find attached presentation on Investor update for 03rd quarter for financial year 2019-20.

This is for your information and records.

Thanking You.

Yours faithfully,  
For **PVR Limited**

**Pankaj Dhawan**  
**Company Secretary cum Compliance Officer**

PVR LIMITED

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# INVESTOR UPDATE

## Q3 FY 2019-20

23<sup>RD</sup> JANUARY, 2020

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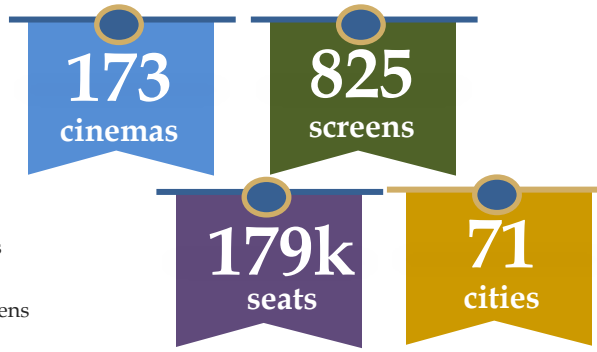
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# Screen Portfolio<sup>1</sup>

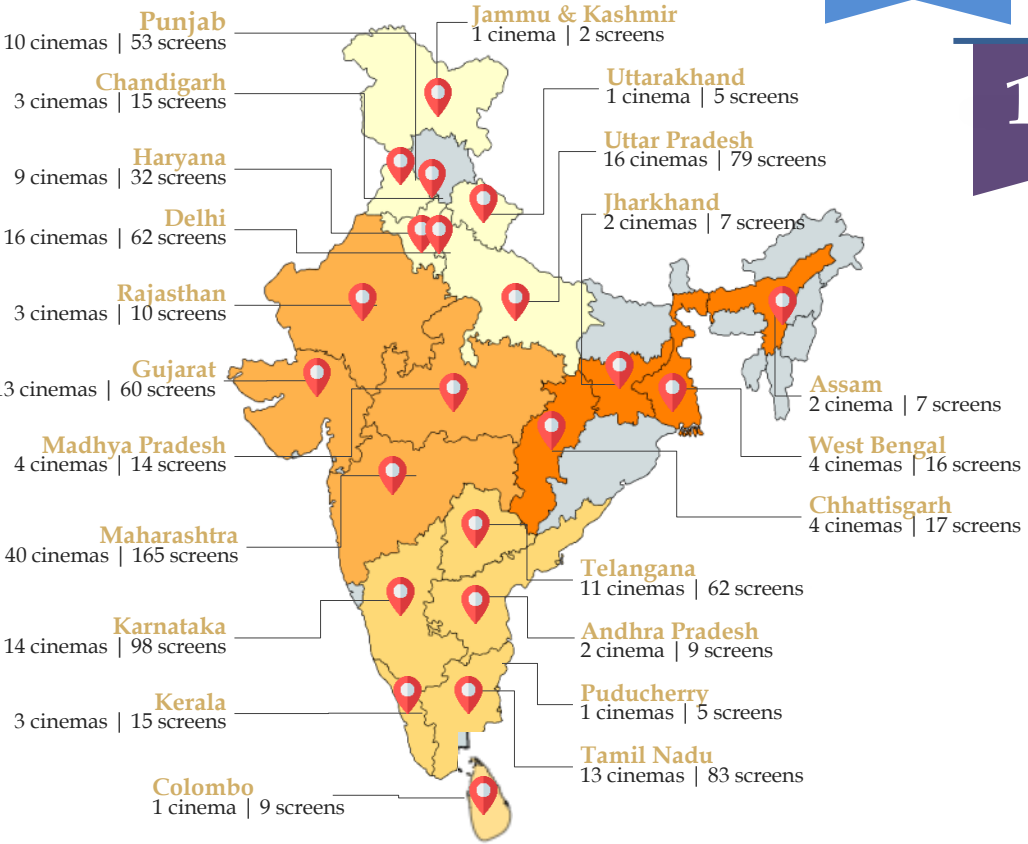


Format	Screens
Gold Class / Luxe	41
4DX	17
Playhouse	12
IMAX	9
P[XL]	8
Onyx	1
<b>Total</b>	<b>88</b>

11% of our screen portfolio is premium

## Screens by Region

Region	Current	% of total
South	281	34%
West	249	30%
North	248	30%
East	47	6%
<b>Total</b>	<b>825</b>	



Note: [1] Numbers as on 23<sup>rd</sup> January, 2020

# Key Updates for the Quarter



Successfully Completed the Qualified Institutional Placement of Equity Shares for INR 500 Crores

Launched the PVR brand film to celebrate patrons and their stories

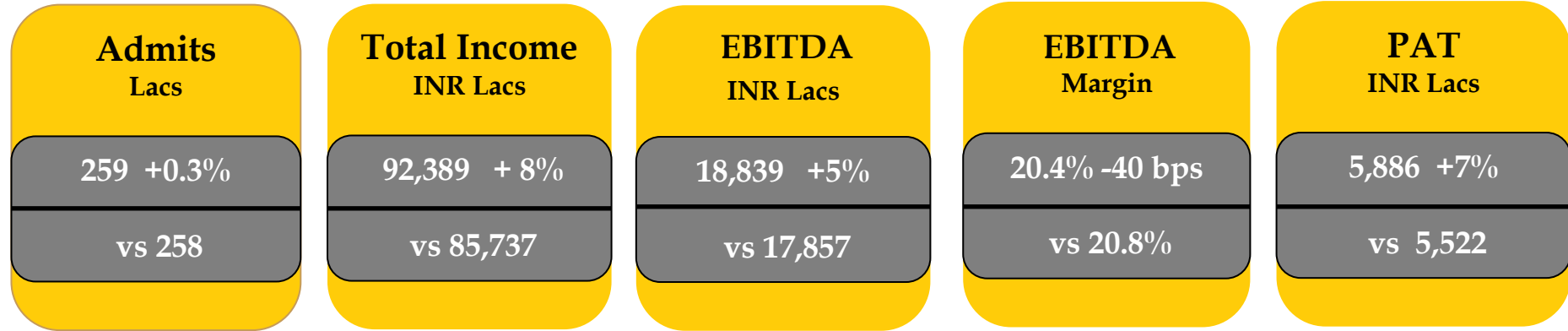
Opened 9 screens at Colombo, Sri Lanka, 12 screens Superplex in Delhi and 4 screens at Zirakpur; 67 screens opened till date

PVR Privilege Crossed 1 Crore members; an 3x increase from beginning of the FY

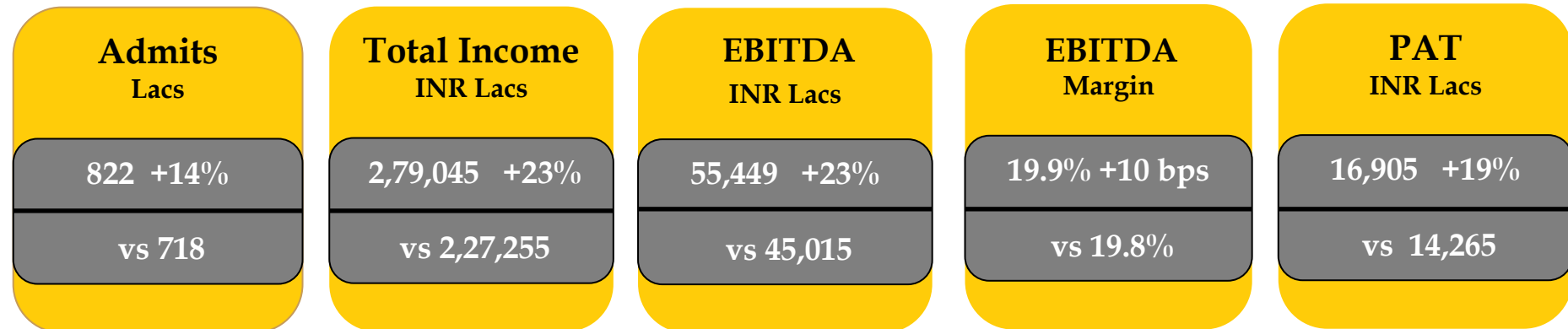
Renewed partnership with Kotak for co-branded credit card



## Key Consolidated Numbers - Q3, FY 19-20 vs Q3, FY 18-19



## Key Consolidated Numbers - 9M, FY 19-20 vs 9M, FY 18-19







# CONSOLIDATED RESULT SUMMARY

# Consolidated Result Summary - Q3, FY 19-20 vs Q3, FY 18-19

Particulars (INR Lacs)	Q3, FY19-20			Q3, FY18-19	Growth <sup>1</sup>
	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted		
Total Income	92,389		92,389	85,737	8%
Expenses	60,846	(12,704)	73,550	67,880	8%
<b>EBITDA</b>	<b>31,543</b>	<b>12,704</b>	<b>18,839</b>	<b>17,857</b>	<b>5%</b>
<b>EBITDA Margin</b>	<b>34.1%</b>		<b>20.4%</b>	<b>20.8%</b>	<b>-40 bps</b>
Depreciation & Amortization expense	13,485	7,854	5,631	5,144	9%
<b>EBIT</b>	<b>18,058</b>	<b>4,850</b>	<b>13,208</b>	<b>12,713</b>	<b>4%</b>
Finance Costs	12,210	8,293	3,917	3,787	3%
<b>PBT</b>	<b>5,833</b>	<b>(3,443)</b>	<b>9,276</b>	<b>8,911</b>	<b>4%</b>
Tax expense	2,207	(1,183)	3,390	3,389	0%
<b>PAT</b>	<b>3,626</b>	<b>(2,260)</b>	<b>5,886</b>	<b>5,522</b>	<b>7%</b>
<b>PAT Margin</b>	<b>3.9%</b>		<b>6.4%</b>	<b>6.4%</b>	<b>0 bps</b>
EPS - Basic (INR)	7.22	4.50	11.72	11.82	-1%
EPS - Diluted (INR)	7.19	4.48	11.68	11.40	2%

Note: [1] Growth is computed basis Ind-AS 116 Adjusted numbers over Q3, FY18-19 reported financials

# Consolidated Result Summary - 9M, FY 19-20 vs 9M, FY 18-19

Particulars (INR Lacs)	9M, FY19-20			9M, FY18-19	Growth <sup>1</sup>
	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted		
Total Income	2,79,045		2,79,045	2,27,255	23%
Expenses	1,86,537	(37,059)	2,23,596	1,82,240	23%
<b>EBITDA</b>	<b>92,508</b>	<b>37,059</b>	<b>55,449</b>	<b>45,015</b>	<b>23%</b>
<b>EBITDA Margin</b>	<b>33.2%</b>		<b>19.9%</b>	<b>19.8%</b>	<b>10 bps</b>
Depreciation & Amortization expense	40,023	22,917	17,106	13,635	25%
<b>EBIT</b>	<b>52,485</b>	<b>14,142</b>	<b>38,343</b>	<b>31,380</b>	<b>22%</b>
Finance Costs	36,466	24,501	11,965	8,850	35%
<b>PBT</b>	<b>15,978</b>	<b>(10,359)</b>	<b>26,337</b>	<b>22,482</b>	<b>17%</b>
Tax expense	5,832	(3,600)	9,432	8,217	15%
<b>PAT</b>	<b>10,146</b>	<b>(6,759)</b>	<b>16,905</b>	<b>14,265</b>	<b>19%</b>
<b>PAT Margin</b>	<b>3.6%</b>		<b>6.1%</b>	<b>6.3%</b>	<b>-20 bps</b>
EPS - Basic (INR)	21.15	14.09	35.23	30.57	15%
EPS - Diluted (INR)	20.64	13.75	34.40	29.87	15%

Note: [1] Growth is computed basis Ind-AS 116 Adjusted numbers over 9M, FY18-19 reported financials



# FINANCIAL ANALYSIS - EXHIBITION BUSINESS

# Revenue Analysis (Exhibition)<sup>1</sup>

## Q3, FY19-20 vs Q3, FY18-19

Particulars (INR Lacs)	Q3, FY19-20		Q3, FY18-19		% Change	
	Comp	Total	Comp	Total	Comp	Total
Screens	629	821	629	748	-	10%
Seats	1,38,125	1,78,063	1,38,125	1,67,271	-	6%
Income from sale of movie tickets	37,508	45,283	37,974	42,542	-1%	6%
Sales of Food & Beverages	20,339	24,403	19,451	21,670	5%	13%
Advertisement Income	10,054	12,195	9,852	11,249	2%	8%
Convenience Fees	4,459	4,749	4,301	4,491	4%	6%
Other Operating Income	1,563	1,763	3,898	4,192	-60%	-58%
<b>Revenue from Operations</b>	<b>73,923</b>	<b>88,394</b>	<b>75,476</b>	<b>84,144</b>	<b>-2%</b>	<b>5%</b>
Other Income	759	759	316	316	140%	140%
<b>Total Income</b>	<b>74,682</b>	<b>89,153</b>	<b>75,792</b>	<b>84,460</b>	<b>-1%</b>	<b>6%</b>

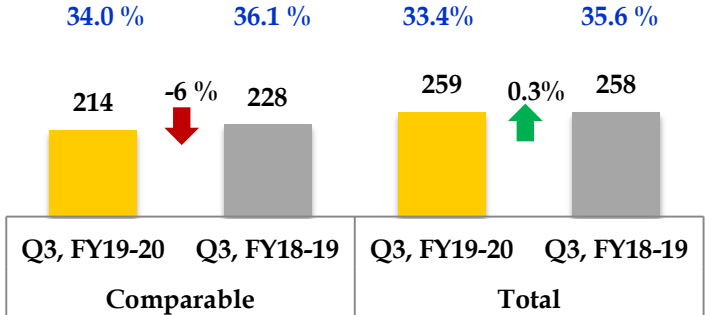
## 9M, FY19-20 vs 9M, FY18-19

Particulars (INR Lacs)	9M, FY19-20		9M, FY18-19		% Change	
	Comp	Total	Comp	Total	Comp	Total
Screens	515	821	515	748	-	10%
Seats	1,09,555	1,78,063	1,09,555	1,67,271	-	6%
Income from sale of movie tickets	97,759	1,40,160	93,674	1,18,427	4%	18%
Sales of Food & Beverages	51,612	77,367	47,983	61,476	8%	26%
Advertisement Income	22,035	30,733	21,331	26,540	3%	16%
Convenience Fees	9,371	13,376	6,806	8,889	38%	50%
Other Operating Income <sup>2</sup>	3,461	5,552	4,050	7,035	-15%	-21%
<b>Revenue from Operations</b>	<b>1,84,238</b>	<b>2,67,189</b>	<b>1,73,844</b>	<b>2,22,367</b>	<b>6%</b>	<b>20%</b>
Other Income	1,731	1,731	992	992	75%	75%
<b>Total Income</b>	<b>1,85,969</b>	<b>2,68,920</b>	<b>1,74,836</b>	<b>2,23,359</b>	<b>6%</b>	<b>20%</b>

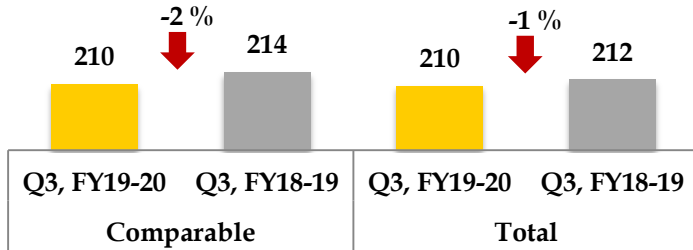
YoY reduction of distribution income in current quarter in SPI Cinemas circuit has led to reduction in Other Operating Income

# Box Office : Q3, FY19-20 vs Q3, FY18-19

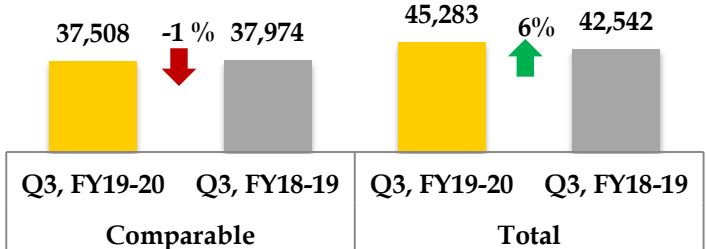
## Admits (lacs) & Occupancy (%)



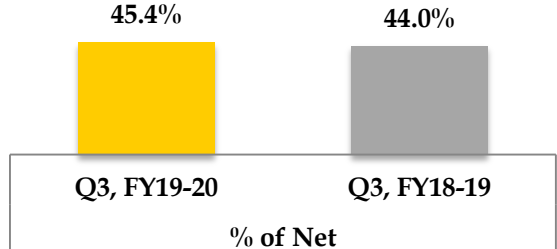
## Gross ATP<sup>1</sup> (Rs)



## Net Box Office (INR lacs)



## FHC (% of NBOC)

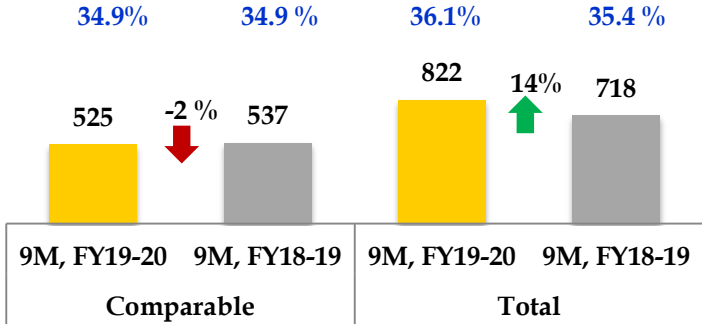


**Weakness in the content performance in Tamil & Telugu film industry resulted in decline in comparable admits**

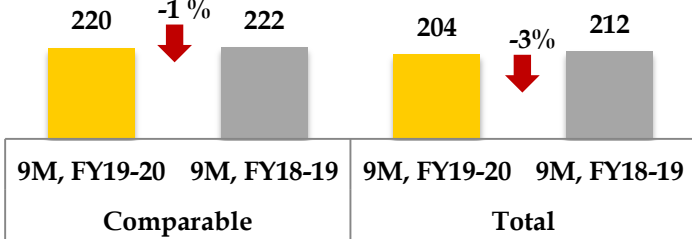
Note: [1] ATP includes 3D Glasses upcharge

# Box Office : 9M, FY19-20 vs 9M, FY18-19

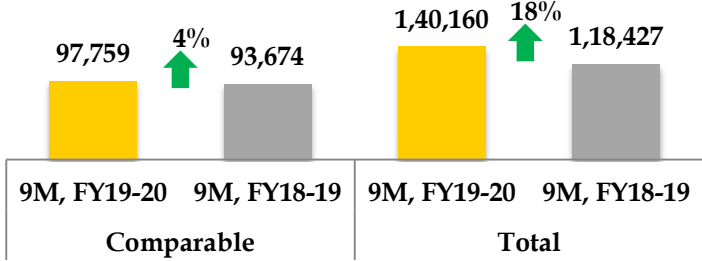
## Admits (lacs) & Occupancy (%)



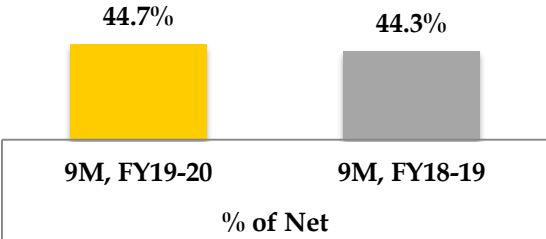
## Gross ATP<sup>1</sup> (INR )



## Net Box Office (INR lacs)





## FHC (% of NBOC)








**Weakness in the content performance in Tamil & Telugu film industry resulted in decline in comparable admits**

Note: [1] ATP includes 3D Glasses upcharge

# Box Office Analysis - Top Grossers

Top 5 Movies - Q3, FY 19-20			
Movie	Admits (Lacs)	NBOC (INR Lacs)	
 War	26	5,256	
 Housefull 4	18	3,439	
 Bala	14	3,171	
 Joker	17	2,645	
 Good Newwz	10	2,415	
<b>Total Top 5</b>	<b>85</b>	<b>16,927</b>	

Top 5 Movies - Q3, FY 18-19			
Movie	Admits (Lacs)	NBOC (INR Lacs)	
 2.0	35	5,490	
 Badhaai Ho	24	4,288	
 Andhadhun	14	2,382	
 Thugs Of Hindostan	11	2,271	
 Simmba	9	2,102	
<b>Total Top 5</b>	<b>95</b>	<b>16,532</b>	

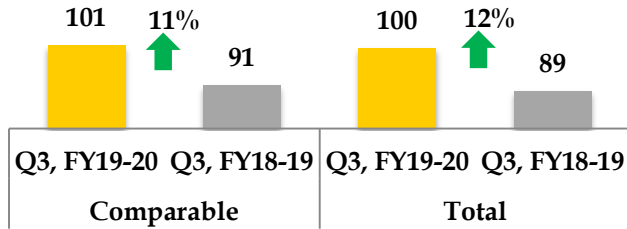
Contribution of regional content fell from 34% to 23% YOY on account of poor performance of Tamil & Telugu Content



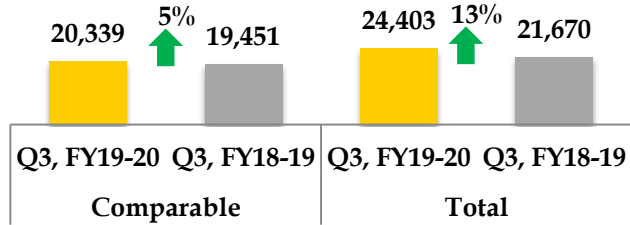
# F&B

## Q3, FY19-20 vs Q3, FY18-19

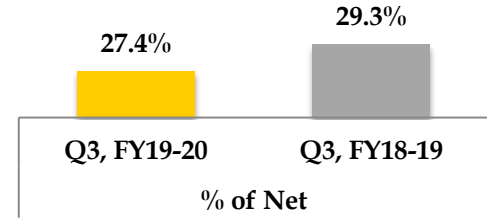
### Spend Per Head (INR )



### Net F&B (INR Lacs)

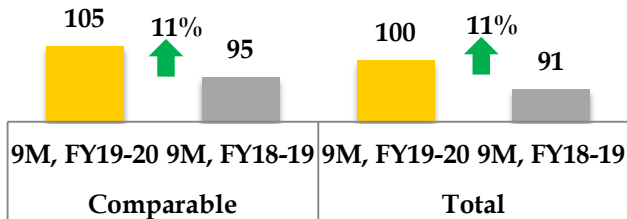


### COGS (% of net)

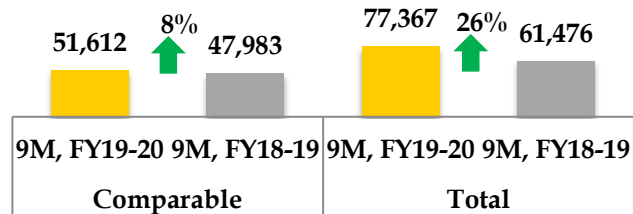


## 9M, FY19-20 vs 9M, FY18-19

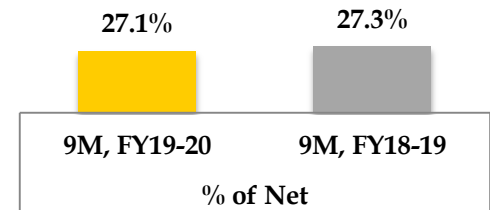
### Spend Per Head (INR )



### Net F&B (INR Lacs)



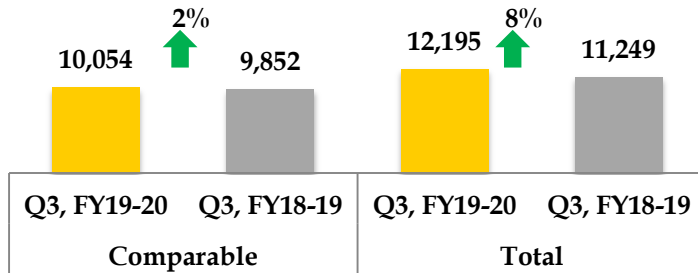
### COGS (% of net)



# Sponsorship Revenues

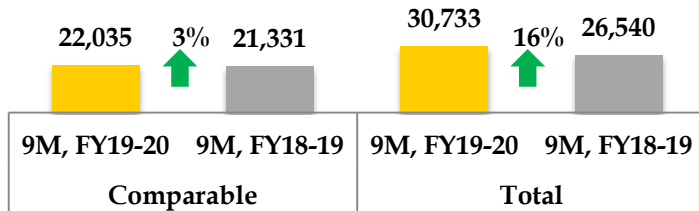
Q3, FY19-20 vs Q3, FY18-19

## Sponsorship Revenues (INR Lacs)



9M, FY19-20 vs 9M, FY18-19

## Sponsorship Revenues (INR Lacs)



# Expenditure Analysis (Exhibition):

## Q3, FY19-20 vs Q3, FY18-19

Particulars (INR Lacs)	Q3, FY19-20		Q3, FY18-19		% Change	
	Comp	Total	Comp	Total	Comp	Total
Employee Benefit Expense	9,172	10,380	8,530	9,264	8%	12%
Rent	11,742	14,672	11,081	12,957	6%	13%
Common area maintenance	3,258	3,918	2,960	3,293	10%	19%
Electricity and water charges	4,170	5,074	3,998	4,551	4%	11%
Other Expenses	7,592	8,883	10,284	11,479	-26%	-23%
<b>Total Expenses</b>	<b>35,934</b>	<b>42,926</b>	<b>36,853</b>	<b>41,544</b>	<b>-2%</b>	<b>3%</b>

## 9M, FY19-20 vs 9M, FY18-19

Particulars (INR Lacs)	9M, FY19-20		9M, FY18-19		% Change	
	Comp	Total	Comp	Total	Comp	Total
Employee Benefit Expense	21,772	30,884	19,047	23,930	14%	29%
Rent	30,173	43,747	28,126	36,576	7%	20%
Common area maintenance	8,643	11,532	8,012	9,406	8%	23%
Electricity and water charges	10,606	16,629	10,300	13,666	3%	22%
Other Expenses	20,348	27,438	20,107	26,602	1%	3%
<b>Total Expenses</b>	<b>91,541</b>	<b>1,30,230</b>	<b>85,592</b>	<b>1,10,179</b>	<b>7%</b>	<b>18%</b>

YoY reduction of distribution expenses in current quarter in SPI Cinemas circuit has led to reduction in Other Expenses



# PROFORMA FINANCIALS - SPI CIRCUIT

# Proforma Financials for SPI Circuit<sup>1,2</sup>

Particulars (INR Lacs)	Q3			9M		
	FY 19-20	FY 18-19	Growth	FY 19-20	FY 18-19	Growth
Income from sale of movie tickets	4,991	5,633	-11%	15,065	7,877	91%
Sale of food and beverages	3,675	3,844	-4%	11,314	5,599	102%
Advertisement Income	1,414	1,133	25%	3,348	1,539	117%
Convenience Fees	997	1,000	0%	2,917	1,435	103%
Other Revenue from operations	80	2,029	-96%	1,109	2,569	-57%
<b>Revenue from Operations</b>	<b>11,157</b>	<b>13,639</b>	<b>-18%</b>	<b>33,753</b>	<b>19,019</b>	<b>77%</b>
Other Income	103	61	68%	246	92	166%
<b>Total Income</b>	<b>11,259</b>	<b>13,700</b>	<b>-18%</b>	<b>33,999</b>	<b>19,112</b>	<b>78%</b>
<b>Total Expenses</b>	<b>8,141</b>	<b>10,626</b>	<b>-23%</b>	<b>25,446</b>	<b>14,944</b>	<b>70%</b>
<b>EBITDA</b>	<b>3,118</b>	<b>3,074</b>	<b>1%</b>	<b>8,553</b>	<b>4,168</b>	<b>105%</b>
<b>EBITDA Margin</b>	<b>27.7%</b>	<b>22.4%</b>	<b>530 bps</b>	<b>25.2%</b>	<b>21.8%</b>	<b>340 bps</b>
Location	16	16	-	16	16	-
Screens	75	72	4%	75	72	4%
Seats	19,146	18,825	2%	19,146	18,825	2%
Admits (Lacs)	39	44	-12%	118	64	84%
Occupancy %	49.9%	57.0%	-710 bps	51.0%	56.3%	-530 bps
ATP <sup>3</sup> (INR)	161	172	-7%	162	167	-3%
SPH (INR)	98	88	12%	99	88	13%

Note: [1] Proforma numbers are adjusted for IndAS 116 Impact

[2] Financials of SPI Cinemas are for period post 17th August,2018

[3] ATP Includes 3D Glasses Upcharge



**SCREENS OPENED YTD 2019-2020**

# Screens Opened YTD FY19-20

S. No	Property	City	State	Screen
Q1, FY 20				27
1	Suraj Chanda Tara	Amritsar	Punjab	6
2	Downtown Mall, Newtown	Kolkata	West Bengal	3
3	Vegas Mall	Gorakhpur	Uttar Pradesh	4
4	Uthandi Mall	Chennai	Tamil Nadu	10
5	Preston Mall	Hyderabad	Telangana	4
Q2, FY 20				15
6	Gaur City Mall	Noida	Uttar Pradesh	9
7	GMS City Centre Mall	Satna	Madhya Pradesh	3
8	Riddhi Siddhi Mall	Shri Ganga Nagar	Rajasthan	3
Q3, FY 20				21
9	One Galle Face Mall	Colombo	Colombo	9
10	Vegas Mall, Dwarka	Delhi	Delhi	12
Q4, FY 20				4
11	Cosmo Mall	Zirakpur	Punjab	4
<b>Total Screens Opened As on Date</b>				<b>67</b>

**Company on track to open 90-100 screens in the current financial year**

# Property Opening Images (1/2)



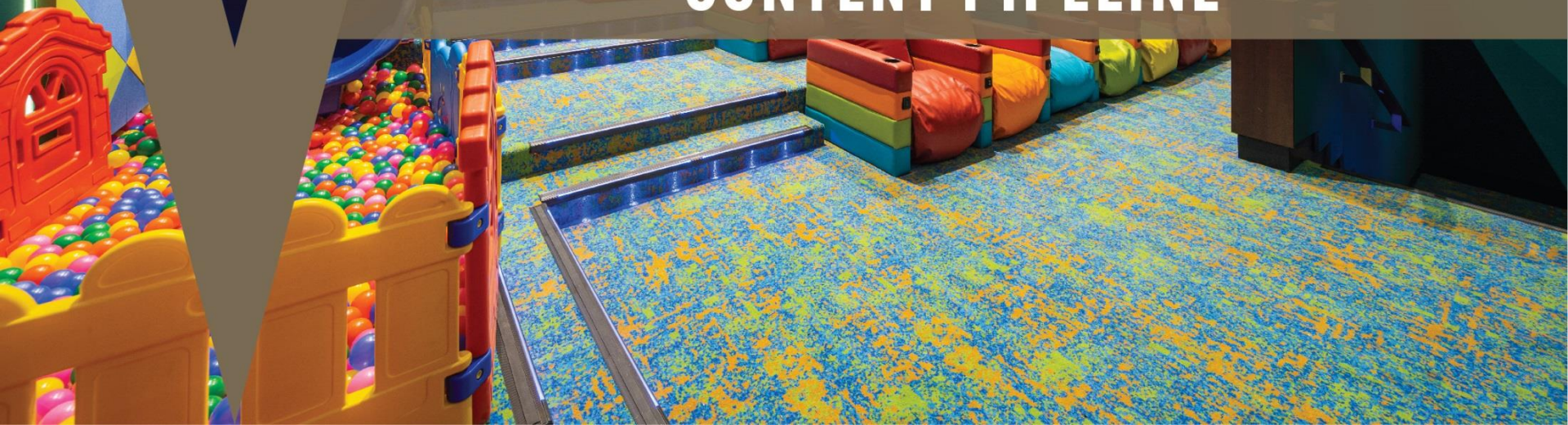


# Property Opening Images (2/2)





# CONTENT PIPELINE



# Content Pipeline: Jan'20 & Feb'20



## PANGA

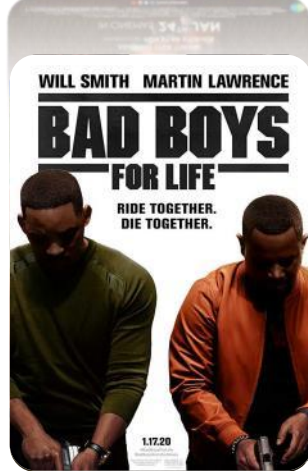
### CAST

Kangana Ranaut, Jassie Gill, Richa Chadha

### DIRECTOR

Ashwiny Iyer Tiwari

24 JAN'20



## BAD BOYS FOR LIFE [IMAX/4DX/D-BOX]

### CAST

Will Smith, Vanessa Hudgens

### DIRECTOR

Adil El Arbi, Bilal Fallah

31 JAN'20



## STREET DANCER [3D]

### CAST

Varun Dhawan, Shraddha Kapoor, Raghav Juyal

### DIRECTOR

Remo D'Souza

24 JAN'20



## BIRDS OF PREY [IMAX/4DX]

### CAST

Margot Robbie, Mary Elizabeth, Junee Smollett-Bell

### DIRECTOR

Cathy Yan

7 FEB'20



## JAWAANI JAANEMAN

### CAST

Saif Ali Khan, Tabu, Alaya Furniturewala

### DIRECTOR

Nitin Kakkar

31 JAN'20



## MALANG

### CAST

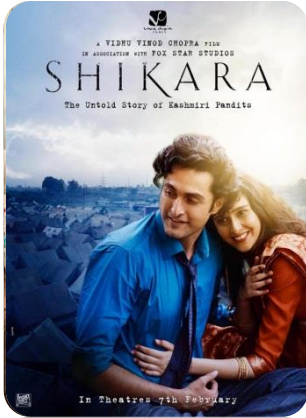
Aditya Roy Kapoor, Anil Kapoor, Disha Patani

### DIRECTOR

Mohit Suri

7 FEB'20

# Content Pipeline: Feb'20



## SHIKARA

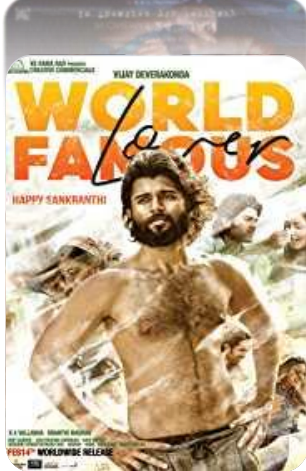
### CAST

Aadil Khan,  
Sadia

### DIRECTOR

Vidhu Vinod Chopra

7 FEB'20



## WORLD FAMOUS LOVER [TELUGU]

### CAST

Vijay Deverakonda, Raashi  
Khanna, Aishwarya Rajesh

### DIRECTOR

Kranthi Madhav

14 FEB'20



## LOVE AAJ KAL

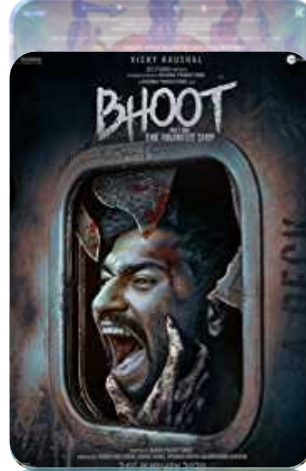
### CAST

Kartik Aaryan, Randeep  
Hooda,  
Sara Ali Khan

### DIRECTOR

Intiaz Ali

14 FEB'20



## BHOOT: PART ONE - THE HAUNTED SHIP

### CAST

Vicky Kaushal,  
Bhumi Pednekar, Ashutosh  
Rana

### DIRECTOR

Bhanu Pratap Singh

21 FEB'20



## SUFNA [PUNJABI]

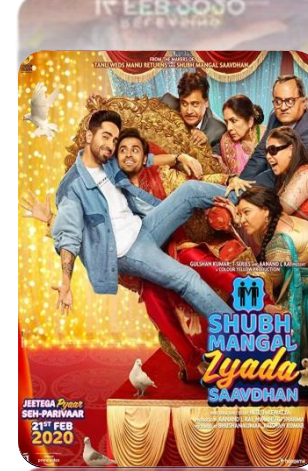
### CAST

Taniya Paul,  
Ammy Virk

### DIRECTOR

Jagdeep Sidhu

14 FEB'20



## SHUBH MANGAL ZYADA SAAVDHAN

### CAST

Maanvi Gagroo,  
Ayushmann,  
Neena Gupta

### DIRECTOR

Hitesh Kewalya

21 FEB'20

# Content Pipeline: Feb'20 & Mar'20



## BLOODSHOT [4DX]

**CAST**  
Eiza González,  
Sam Heughan,  
Vin Diesel

**DIRECTOR**  
Dave Wilson

28 FEB'20



## ONWARD [IMAX /4DX /3D]

**CAST**  
Tom Holland,  
Chris Pratt,  
Julia Louis-Dreyfus

**DIRECTOR**  
Dan Scanlon

6 MAR'20



## THAPPAD

**CAST**  
Taapsee Pannu,  
Manoj Pahwa,  
Sharman Joshi

**DIRECTOR**  
Anubhav Sinha

28 FEB'20



## BAAGHI 3

**CAST**  
Shraddha Kapoor,  
Tiger Shroff,  
Riteish Deshmukh

**DIRECTOR**  
Ahmed Khan

6 MAR'20



## IK SANDHU HUNDA SI [PUNJABI]

**CAST**  
Gippy Grewal,  
Neha Sharma, Vikramjeet  
Virk

**DIRECTOR**  
Rakesh Mehta

28 FEB'20



## THE INVISIBLE MAN [IMAX]

**CAST**  
Elisabeth Moss,  
Oliver Jackson-Cohen,  
Aldis Hodge

**DIRECTOR**  
Leigh Whannell

13 MAR'20

# Content Pipeline: Mar'20



## GUNJAN SAXENA: THE KARGIL GIRL

**CAST**  
Janhvi Kapoor,  
Pankaj Tripathi,  
Angad Bedi

**DIRECTOR**  
Sharan Sharma

13 MAR'20



## MULAN [IMAX /4DX /3D]

**CAST**  
Yifei Liu,  
Donnie Yen,  
Jet Li

**DIRECTOR**  
Niki Caro

27 MAR'20

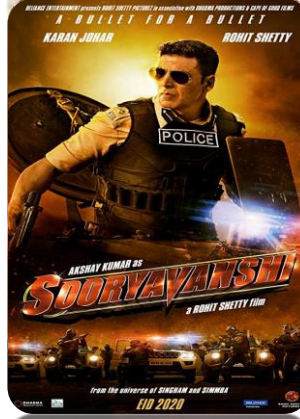


## CHHALANG

**CAST**  
Rajkummar Rao, Nushrat  
Bharucha, Mohammed  
Zeeshan Ayyub

**DIRECTOR**  
Hansal Mehta

13 MAR'20



## SOORYAVANSHI

**CAST**  
Akshay Kumar,  
Katrina Kaif,  
Ajay Devgn

**DIRECTOR**  
Rohit Shetty

27 MAR'20



## ANGREZI MEDIUM

**CAST**  
Irrfan Khan,  
Radhika Madan,  
Poorvi Jain

**DIRECTOR**  
Homi Adajania

20 MAR'20

**THANK YOU**

**For any queries please contact investor relations team:**

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**Phone : 0124 4708100 / Extn: 8197**