

GTPL Hathway Limited

CIN : L64204GJ2006PLC048908

Registered Office : 202, 2nd Floor, Sahajanand Shopping Centre,
Opp. Swaminarayan Temple, Shahibaug, Ahmedabad-380004, Gujarat.
Phone : 079-25626470 Fax : 079-61400007



Ref. No.: GTPL/SE/2020

January 9, 2020

BSE Limited
Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai 400 001

National Stock Exchange of India Limited
Exchange Plaza,
Plot No. C/1, G Block,
Bandra Kurla Complex, Bandra (East),
Mumbai - 400051

Scrip Code: 540602

Trading Symbol: **GTPL**

Dear Sir/Madam,

**Sub: Investor Presentation on Unaudited Standalone and Consolidated Financial Results
for the quarter and nine months ended December 31, 2019**

Kindly find enclosed herewith a copy of Investor Presentation on Unaudited Standalone and Consolidated Financial Results for the quarter and nine months ended December 31, 2019 of the Company.

The same is also being uploaded on the Company's website at www.gtpl.net.

You are requested to take the same on your records.

Thanking you.

Yours faithfully,
For GTPL Hathway Limited

Hardik Sanghvi
Company Secretary & Compliance Officer
FCS: 7247



Encl: As above



GTPPL Hathway Limited

**Q3 & 9M FY20
RESULTS UPDATE**

JANUARY 2020

DISCUSSION SUMMARY

1 Company Overview & Strategy

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2 Key KPIs

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3 Consolidated Financials

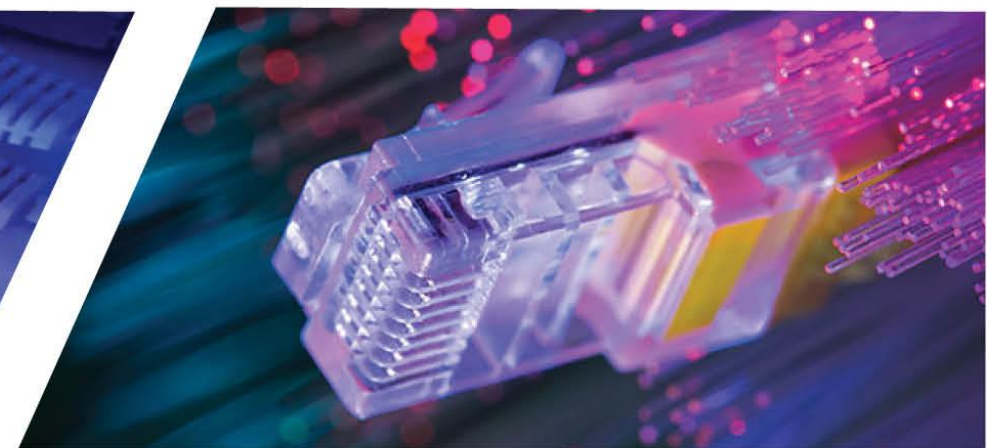
16 - 21

4 Standalone Financials

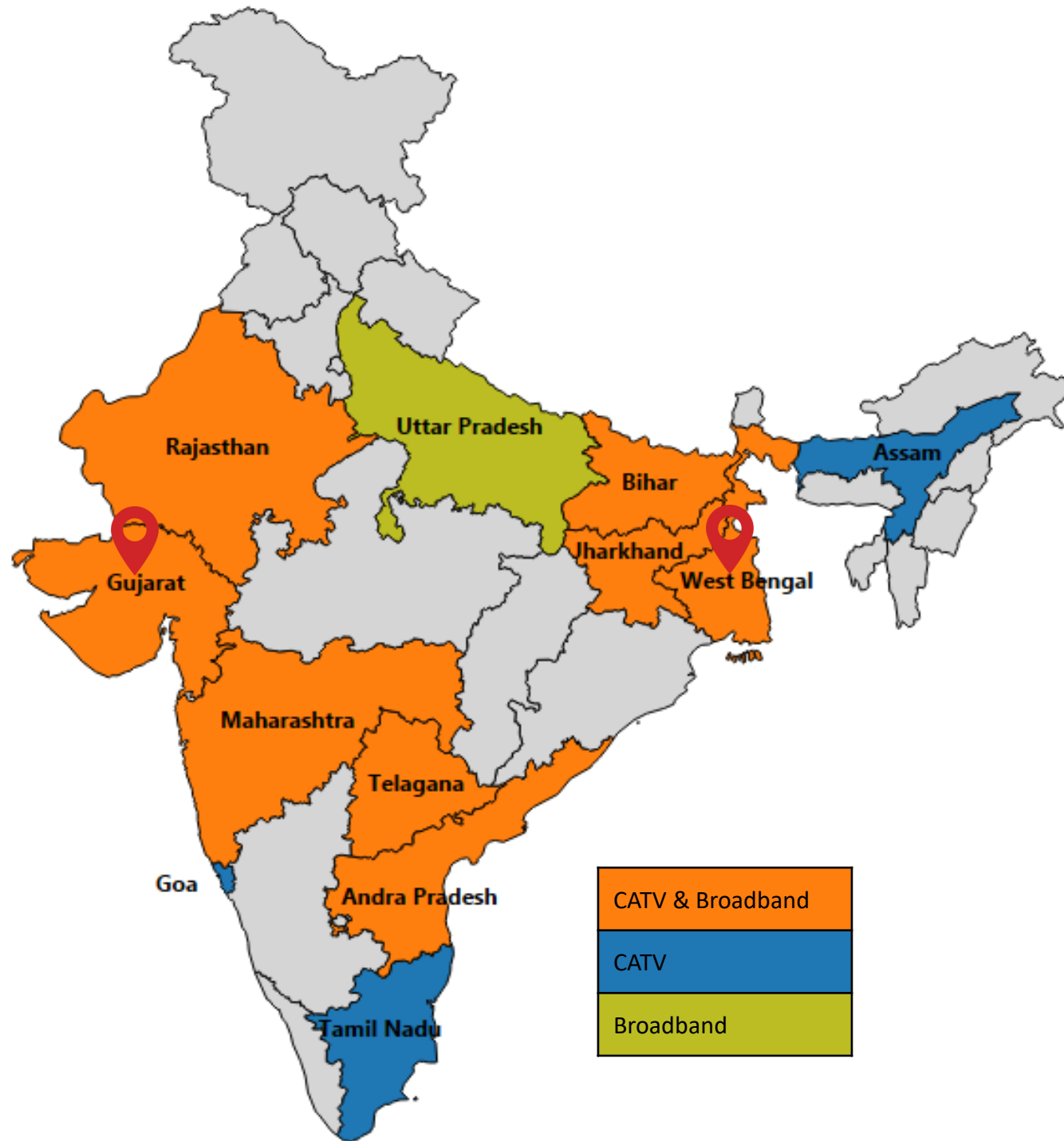
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Company Overview & Strategy



Leader across Key Cable Markets in India



Commenced Business from Gujarat in 2006 with CATV services.

Grew to National MSO with footprints in 750+ towns across 12 States in India in 13 Years, providing both CATV & Broadband Services.

#No.1 MSO in Gujarat with 67% market share.

#No.2 Player in West Bengal with 24% market share.

Significant presence in Maharashtra.




3.16 Mn Broadband Home Pass, mainly in Gujarat.

Substantial presence in Key Regions dominated by Hindi Speaking population.



- Total Revenue increased by 37% 9M-o-9M; Subscription Revenue increased by 46% 9M-o-9M;
- ISP Revenue increased by 13% 9M-o-9M
- EBITDA of ₹ 3,447 Mn in 9M FY20; 34% increase 9M-o-9M.
- PAT of ₹ 665 Mn in 9M FY20; ₹ 192 Mn increase 9M-o-9M.
- Gross Debt at ₹ 2,443 Mn in Dec-19; ₹ 2,918 Mn in Jun-19 & ₹ 3,452 Mn in Mar-19
- Drop by ₹ 475 Mn Q-o-Q; ₹ 1,009 Mn in FY20
- Net Debt at ₹ 1,861 Mn in Dec-19; ₹ 2,178 Mn in Sep-19 & ₹ 2,064 Mn in Mar-19
- Drop by ₹ 317 Mn Q-o-Q; ₹ 203 Mn in FY20
- Maintained Broadband ARPU of ₹ 415 during Q3 FY20

Key Financial Highlights (in ₹ Mn)

	9M FY20	9M FY19	FY19	FY18
 REVENUE	12,879	9,404	12,892	11,134
 EBITDA	3,447	2,579	3,615	3,175
 PAT	665	473	191 [#]	614

Exceptional item (Provision for Bad Debts) of ₹ 650 Mn



CATV Business Performance

- Increase of 150K Connected Homes during Q3 FY20
- Increase of 100K Paying Subscribers during Q3 FY20
- Phase I, II, III & IV contributes 11%, 20%, 33% & 36% respectively of total Connected Homes (10.05 Mn)
- Ventured in Tamil Nadu (Chennai) market during Q3 FY20
- More than **70%** collections through **Digital Mode**

Key Highlights



10.05 Mn

Connected
Homes



7.80 Mn

Active¹
Subscribers



7.35 Mn

Paying
Subscribers



46%

9M-o-9M growth in
Subscription
Revenue



100%

base converted in
Auto dunning
through GTPL Saathi



37

GTPL Owned &
Operated
Channels



- Active subscribers reached 375K ; increase of 20K in Q3 FY20
- 3.16 Mn Home Pass ; 50% Home Pass available for FTTX conversion
- Data Consumption per Customer stands at 126 GB / Month as on Dec-19; Up by 33% Y-o-Y, from 95 GB / month in Dec-18
- **“Truly Unlimited”** : 99%+ Subscribers opted for Unlimited data plans

Key Highlights



375K

Active Subscriber
#20K addition in
Q3FY20



3.16 Mn

Home Pass
#240K addition in
Q3FY20



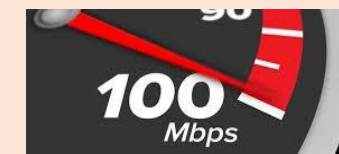
85K

FTTX Subscribers



17%

Y-o-Y growth in
Broadband ISP
Revenue



100 Mbps

Speed with
Unlimited Data
offered



99%

Subscribers with
Unlimited
data



Key Inherent Strength of GTPL Hathway

Leadership Position in Operating Markets



- #1 MSO in Gujarat, #2 in WB
- Significant Presence in Rest of Maharashtra; 1.5 Mn Connected Homes
- 3.16 Mn Broadband Home Pass, mainly in Gujarat

Located in Consumption Market



- 95% CATV Subscribers in Hindi Speaking Market
- Gujarat, Maharashtra, WB key markets for National and Regional Advertiser
- Better Negotiation Power with Broadcaster

Trusted Partner



- 27,000+ LCOs as Business Partners
- Bottom-up company – Transparency in its approach
- Ease-of-Business via multiple Apps in Vernacular Languages
- “Digital Payment Options” to LCOs & Subscribers

High Quality Technology and Infrastructure

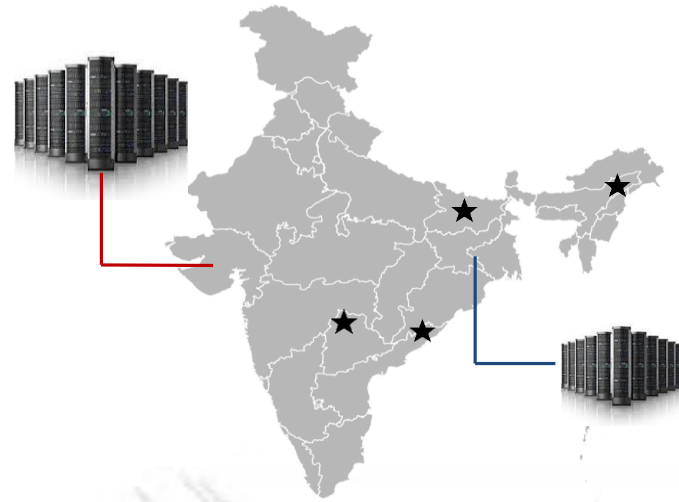


- State-of-the-Art Next Generation Video Headend System from Harmonics Inc., USA
- State-of-the-Art BNG solutions from Nokia for high speed FTTX broadband



Cutting Edge Technology and Infrastructure

Advanced technology and equipment provided by leading technology vendors



Headend:

- 2 Main Headend & 4 support Headend for disaster management.
- Mother Headend & Network Operating Centre (NOC) in Gujarat, capable to cater across India.
- 2nd Main Headend in Kolkata.
- Distributing 650+ channels including 79 HD channels across India.

Optic Fibre Cable Network:

- Owned : 35,000+ KMs
- Underground : 2,500+ KMs
- Leased: 5,500+ KMs

GPON Technology:

- Seamless connectivity
- Higher broadband speed
- VoD, OTT capabilities

Technology Partners

Headend



STBs & Modem



SMS



CAS



NOC & OSS



Experienced Management Team with Strong Track Record

Anirudhsinhji Jadeja
Promoter and MD

A zealous entrepreneur; started with cable operations in 90s and shaped GTPL in 2006; has many accomplishments to his credit and has won numerous industry/social awards

Anil Bothra
Chief Financial Officer

CA,CS and CMA with 24 years of experience; has worked with Grasim, Atul Ltd, Shell Hazira LNG etc. across various roles including Business Strategy, Corporate Finance, Budgeting, Internal Control and M&A

Piyush Pankaj
Business Head - CATV & Chief
Strategy Officer

CFA & MBA with 21 years of varied experience in Media, Internet & e-commerce; has worked in Astro Group (Malaysia) and Zee Group (India)

Neeraj Agrawal
Head Broadband (Retail)

MBA from Devi Ahilya Vishwavidyalaya University; 23 years of experience in managing diverse telecom products (both GSM & CDMA), largely in Reliance Communications

Subrata Bhattacharya
Chief Information & Technology
Officer

Electrical Engineer with 25 years of rich experience in analog / digital cable TV / Broadband Technology across reputed companies like RPG Netcom, Siti Cable & Cablecomm

Ekta Kanade
Chief Legal Officer

Bachelor in Law, University of Bombay; 18 years of experience, largely in Media industry and organizations including Viacom 18, Walt Disney, etc.

Ketan Bhatt
Chief People Officer

PGDRM from the Institute of Rural Management, Anand; has worked in British Gas, Idea Cellular, Torrent Pharma and Torrent Power; has 20+ years in experience HR & OD domains





- Successful implementation of New Tariff Order (NTO) across India has opened up avenues for expansion in existing markets & lifted entry barriers in untapped markets.
- Continue increasing footprints in existing market through expansion and venture into new markets through acquisitions & consolidations



- With 4.4 Mn Households' reach in Gujarat & 2.4 Mn in West Bengal, GTPL is better positioned to convert the HH into Broadband subscribers.
- Upgraded and deployed GPON Technology to provide High Speed, High Volume Broadband Services in Gujarat; other regions under way for upgrade to FTTX Solutions.

- **Giga^{HD} Through Hybrid Box– Industry First, Dual Service Product** : Broadband Services along with Cable services, as a single package with attractive rates to convert current customers & add new customers
- **Planned launch after implementing NTO-2**
- Capitalize on current infrastructure of CATV & Broadband business, for better ROI



- **EPC (Engineering, Procurement & Construction) based Project**
- Connected ~2,200 GPs up to Q3 FY20, of total 3,600 GPs to be connected in 10 Districts
- Completed ~11,500 Kms of T&D up to Q3 FY20, of ~17,000 Kms of T&D.



Twin Conditions:

MRP of channels in bouquet $\leq 1.5x$ of Bouquet Price

Channel MRP $\leq 3x$ of Average channel price*

No. of Bouquet to be \leq No. of A-la-Carte

✓ No of Bouquets will get restricted.

✓ Ease in operation

Cap & Pricing of Channels:

- Cap of ₹ 12 for Pay Channel to be part of Broadcaster Bouquet from current ₹ 19.
- A-la-Carte channel Rates are expected to reduce.

Amendments in Tariff

Δ in NCF :

Simplified NCF in 2 slabs

Below 200 channels - ₹ 130

Above 200 channels - ₹ 160

Multi TV Home :

- New provision inserted for Multi TV Homes – the NCF on Additional TV (Multi TV) to be capped at 40% of NCF

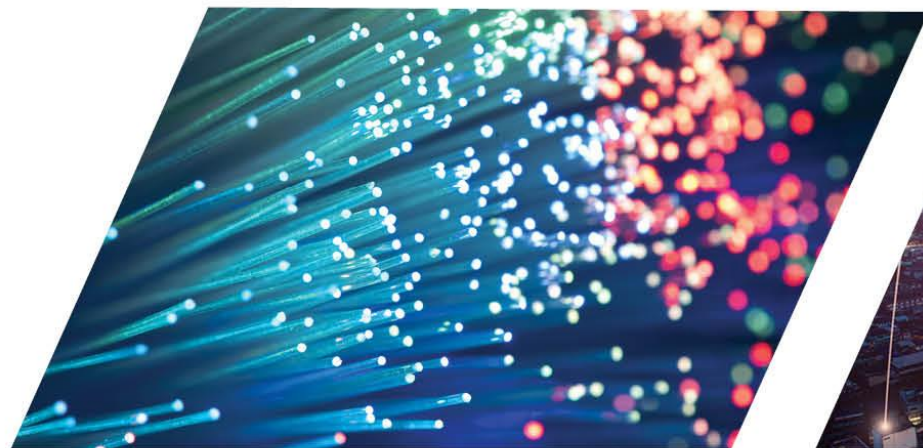
Amendments in Tariff are Expected to Bring More Transparency

*Average channel price = Bouquet Price / No. of Pay channels in Bouquet



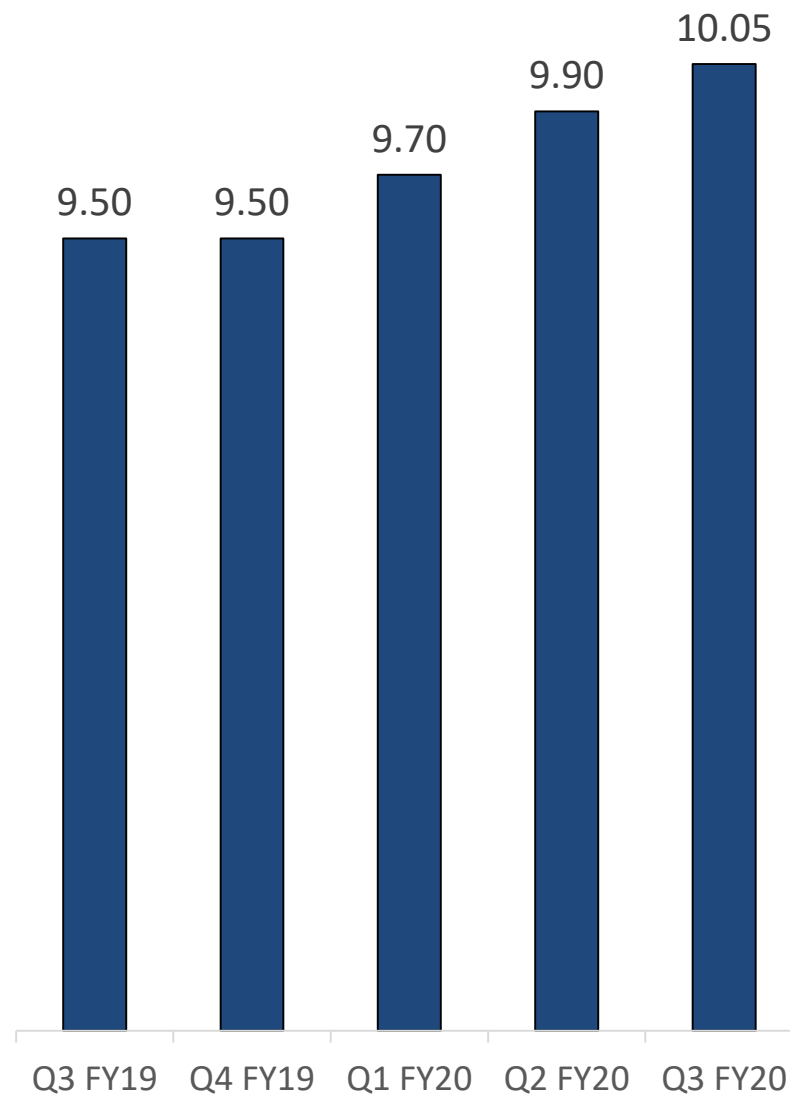


Key KPIs



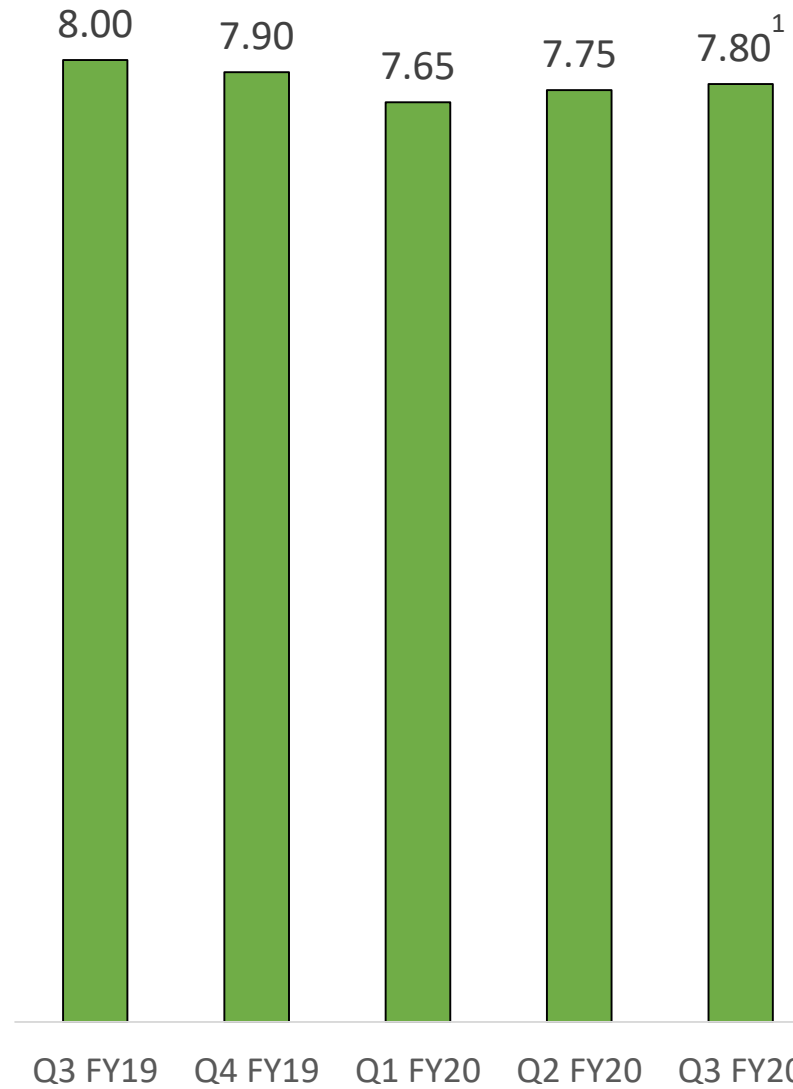
KEY KPIs : CATV Business : Quarterly : Consolidated*

Connected Homes (Mn)

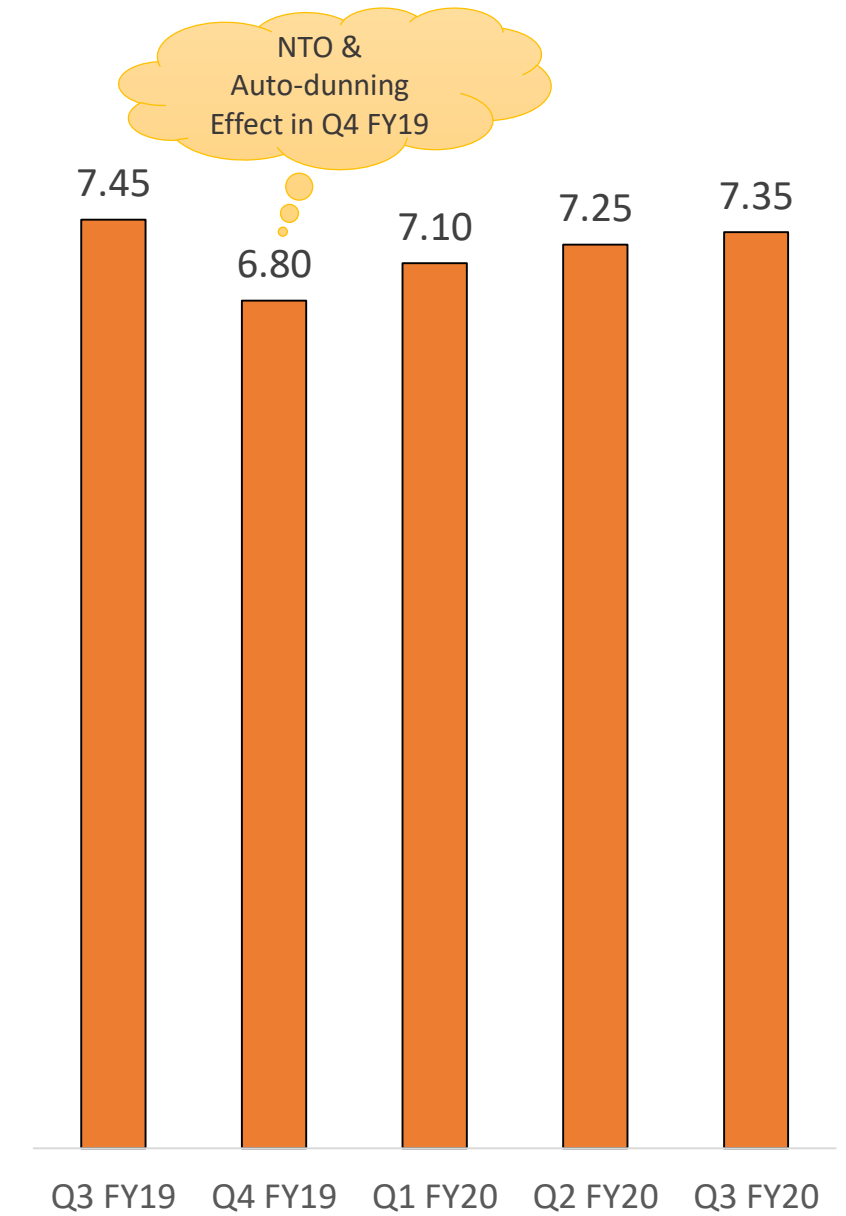


Connected 550K Homes in FY20

Active Subscribers (Mn)



Paying Subscribers (Mn)

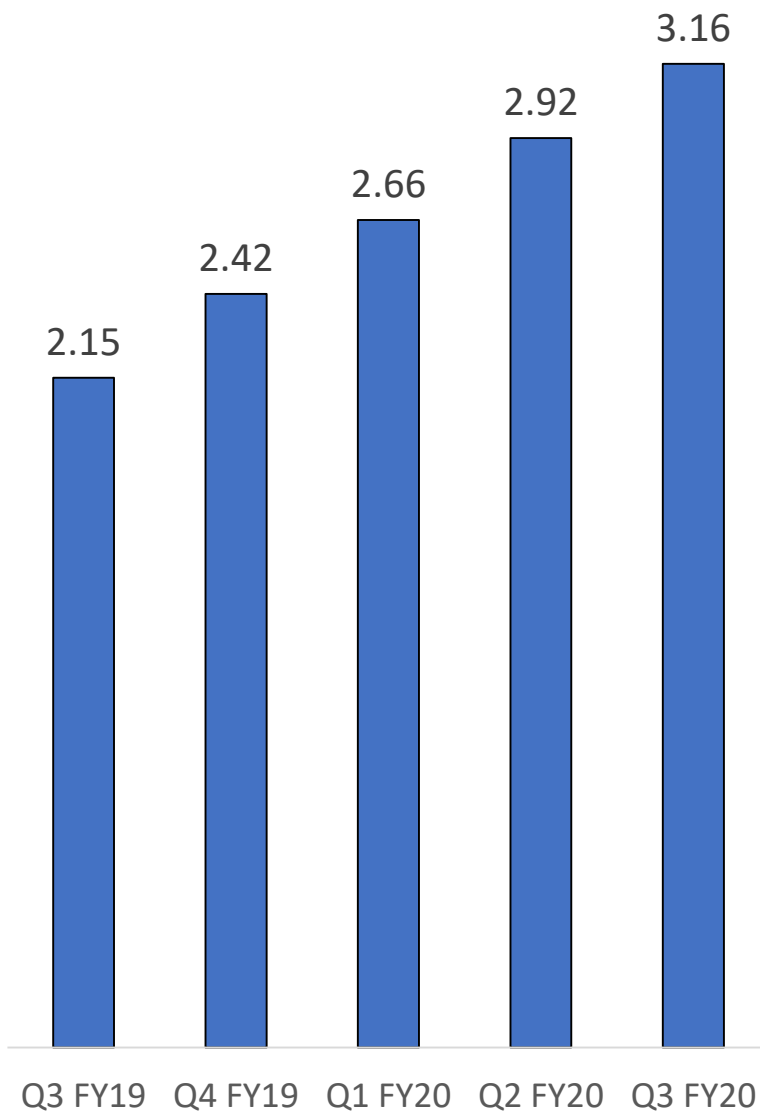


Increase of 550K Subscribers in FY20



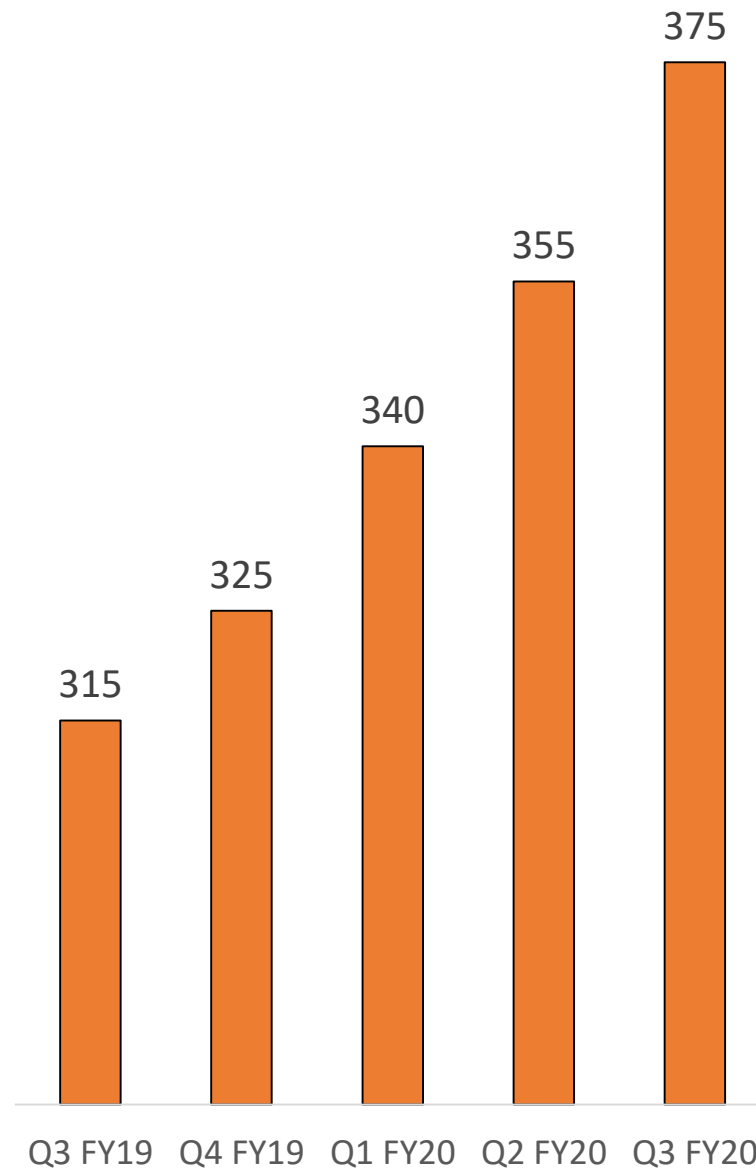
KEY KPIs : Broadband Business : Quarterly

Home Pass (Mn)



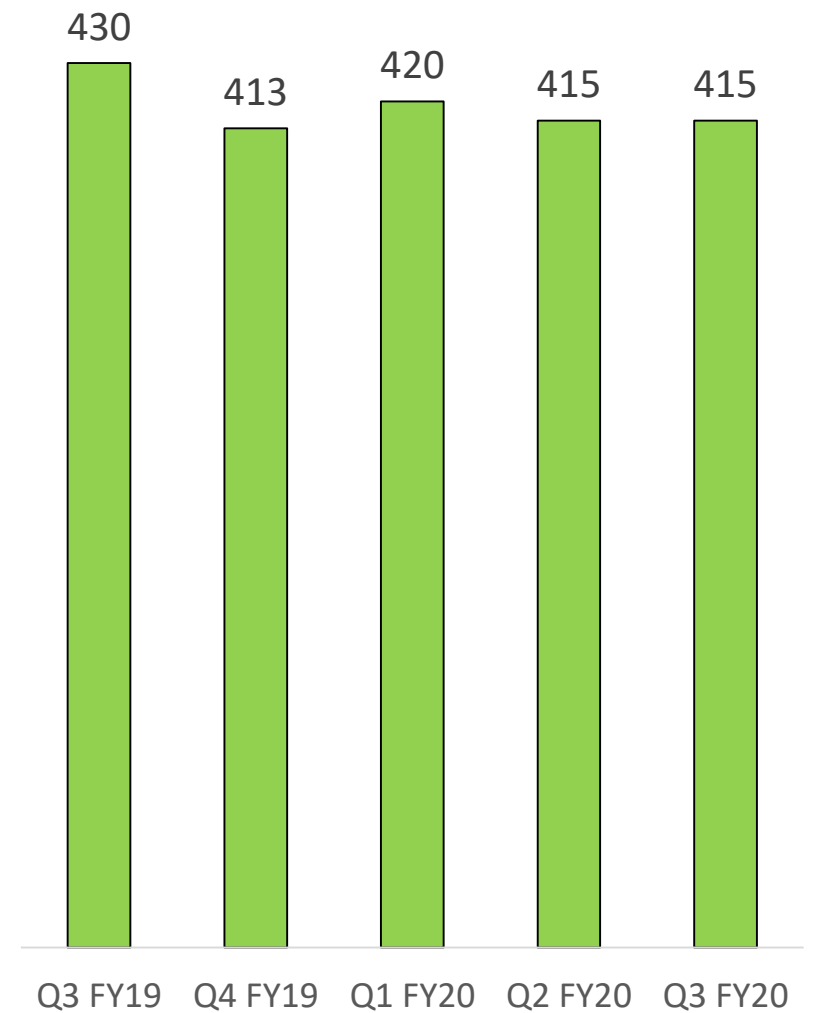
240K New Home Pass in Q3 FY20

Active Subscriber ('000)



ACB Reached 375K ; increase by 20K Q-o-Q

ARPU (₹) (Net of Taxes)

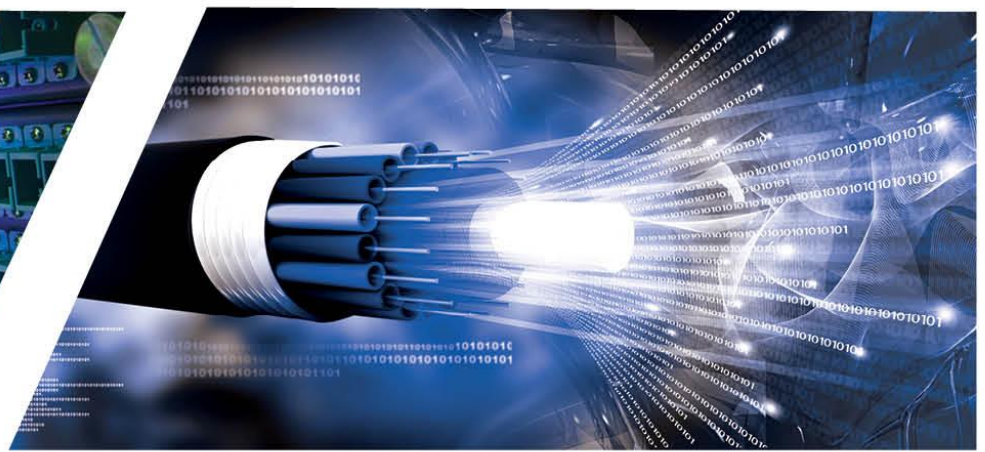


Maintained ARPU of ₹ 400+ in FY20





Consolidated Financials



Financial Highlights : Consolidated*

(Ex EPC)

1 Revenue



Total Revenue up by 37% 9M-o-9M; 41% Y-o-Y
Subscription Revenue up by 46% 9M-o-9M; 44% Y-o-Y
ISP Revenue up by 13% 9M-o-9M; 17% Y-o-Y; 6% Q-o-Q

2 Expenses



Admin cost down by 13% Q-o-Q
Finance cost down by 23% 9M-o-9M

3 EBITDA



EBITDA of ₹ 3,447 Mn in 9M FY20; ₹ 1,188 Mn in Q3 FY20
Up by ₹ 868 Mn (34%) 9M-o-9M; ₹ 32 Mn (3%) Q-o-Q
EBITDA Margin stands at 27% in 9M FY20

4 PAT



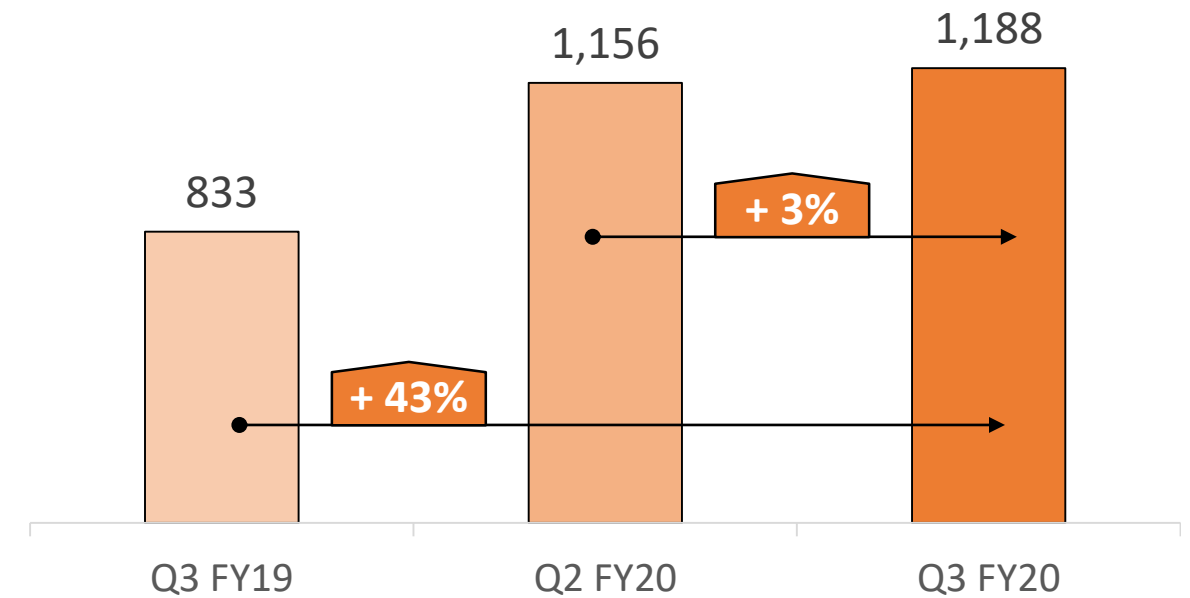
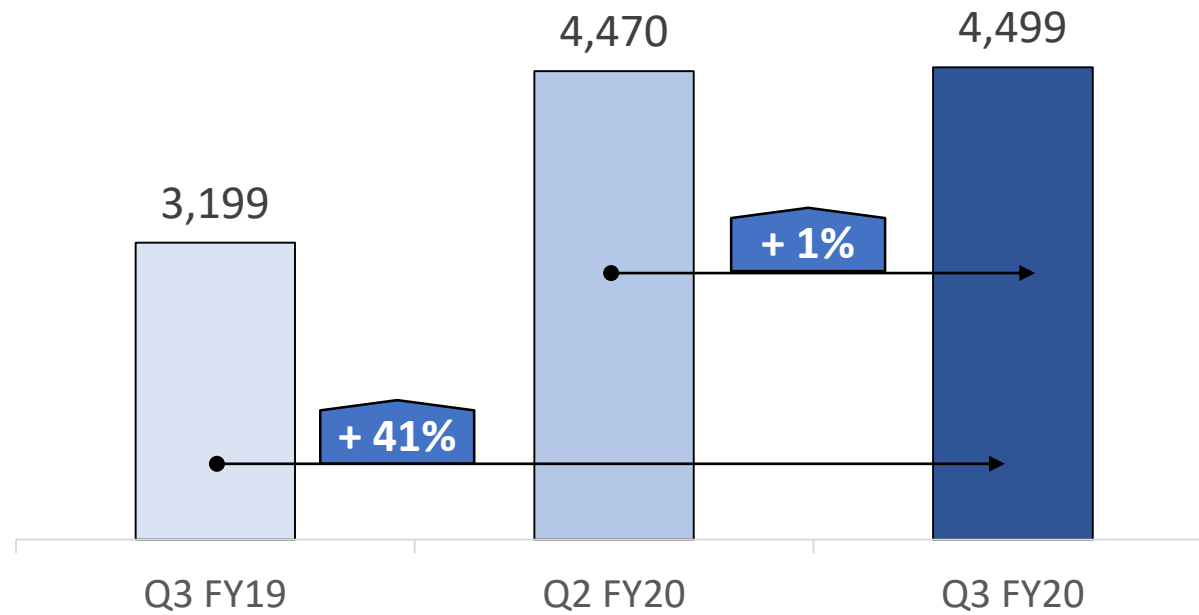
PAT of ₹ 665 Mn in 9M FY20; Up by ₹ 192 Mn (41%) 9M-o-9M



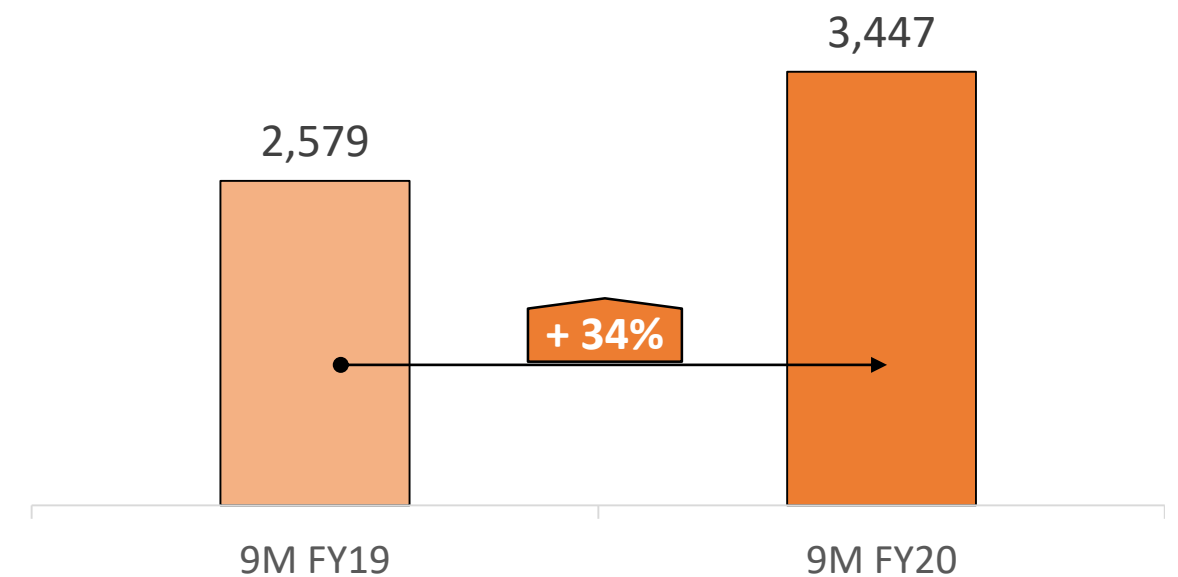
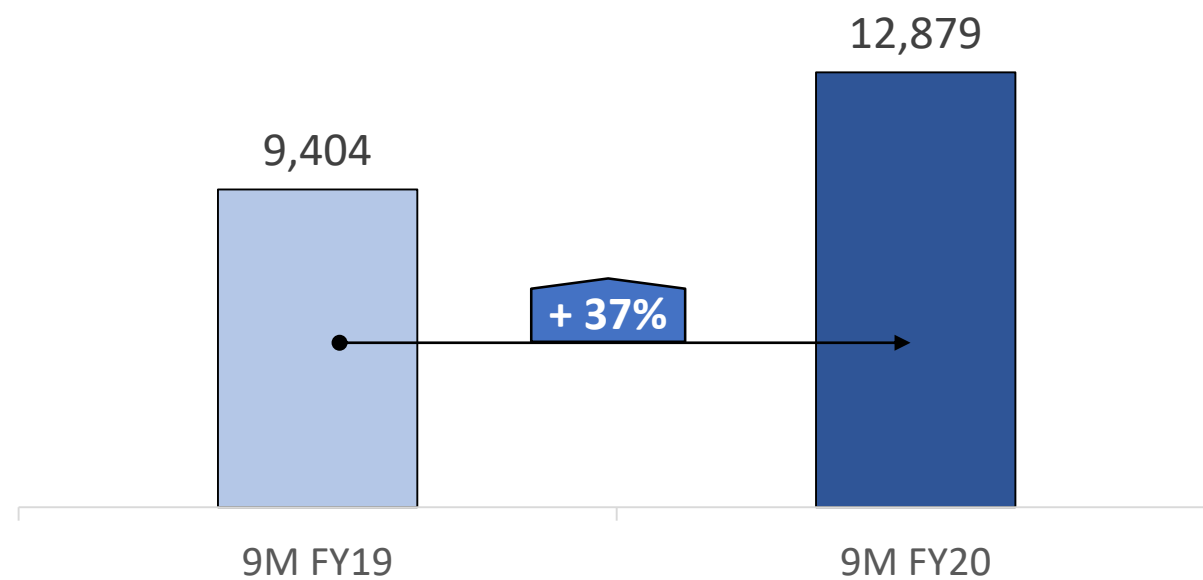
Total Revenue (In ₹ Mn)

EBITDA (In ₹ Mn)

Quarterly



9 Months



* FY = Apr-Mar, Q1 =Apr-Jun, Q2= Jul-Sep, Q3= Oct-Dec, 9M= Apr-Dec

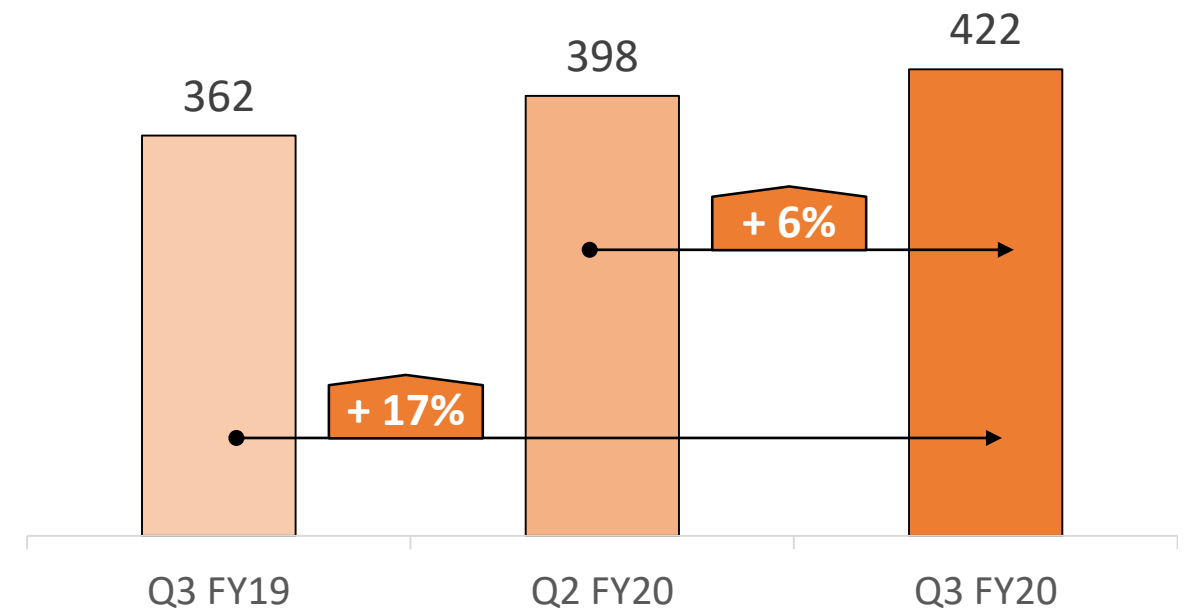
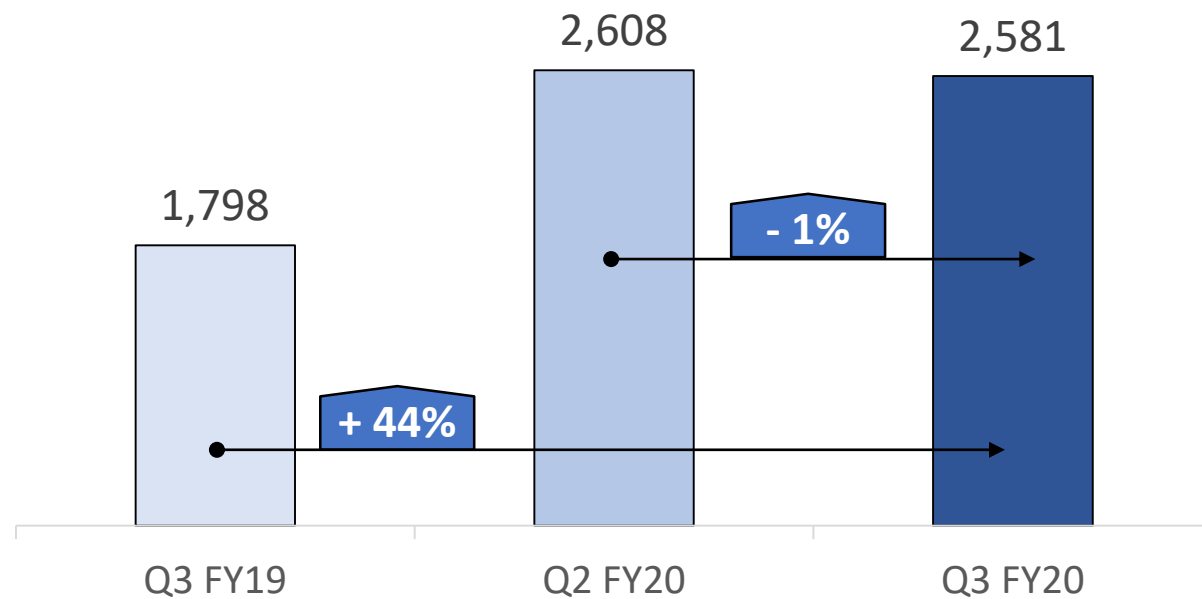
Note : Financial figures are excluding EPC contract



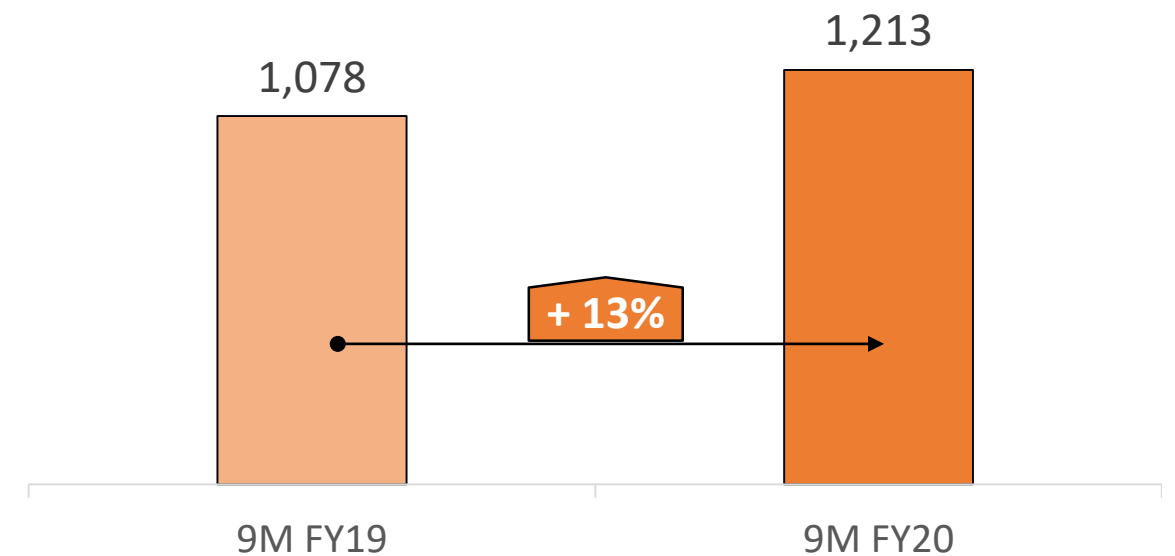
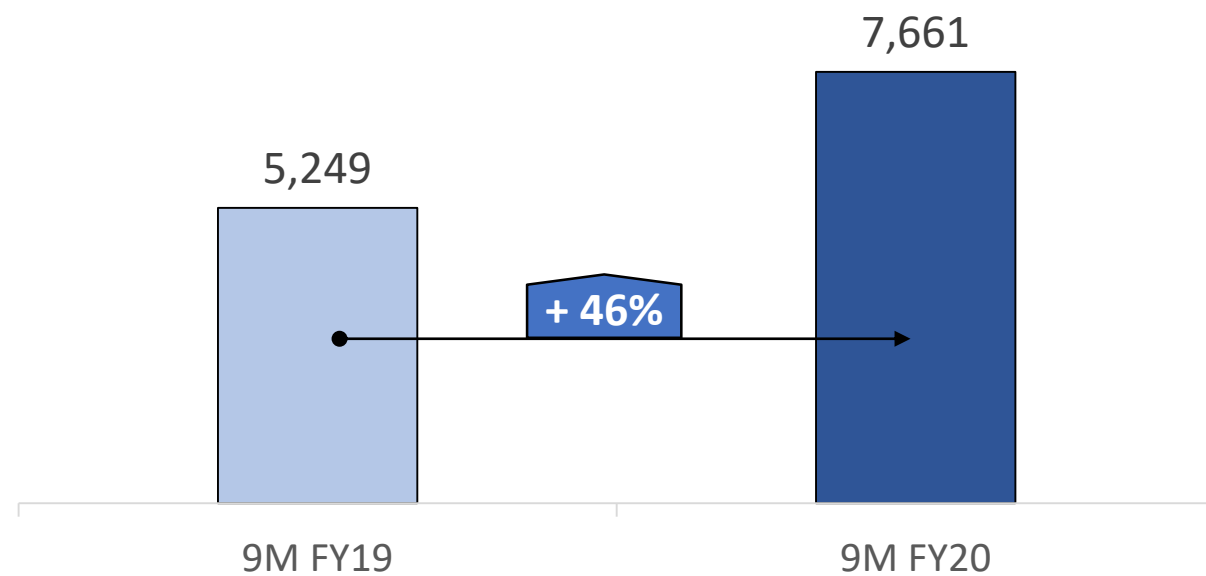
Subscription Revenue (In ₹ Mn)

ISP Revenue (In ₹ Mn)

Quarterly



9 Months



* FY = Apr-Mar, Q1 =Apr-Jun, Q2= Jul-Sep, Q3= Oct-Dec, 9M= Apr-Dec

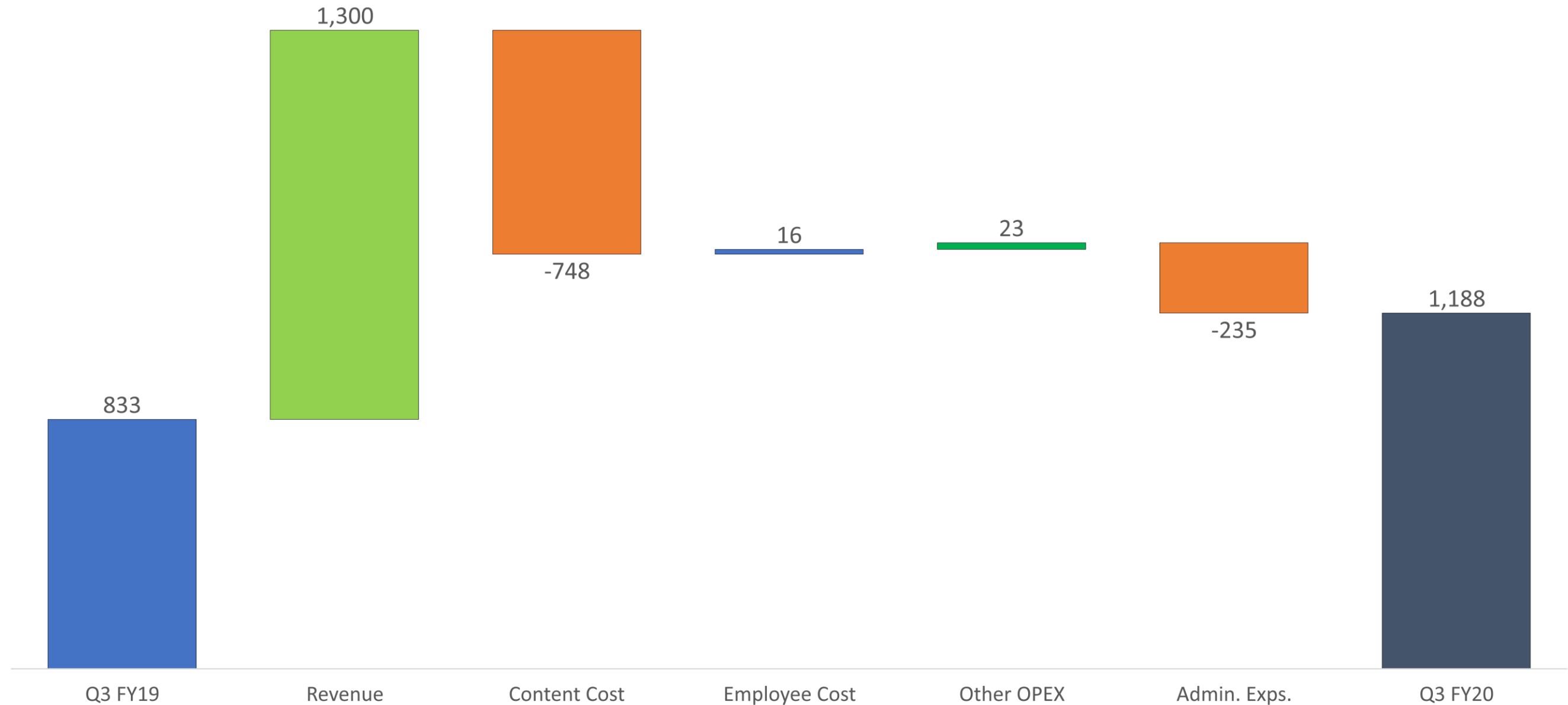
Note : Financial figures are excluding EPC contract



EBITDA Bridge : Consolidated*

(Ex EPC)

In ₹ Mn



* FY = Apr-Mar, Q1 =Apr-Jun, Q2= Jul-Sep, Q3= Oct-Dec, 9M= Apr-Dec

Note : Financial figures are excluding EPC contract



Profit & Loss Statement : Consolidated*

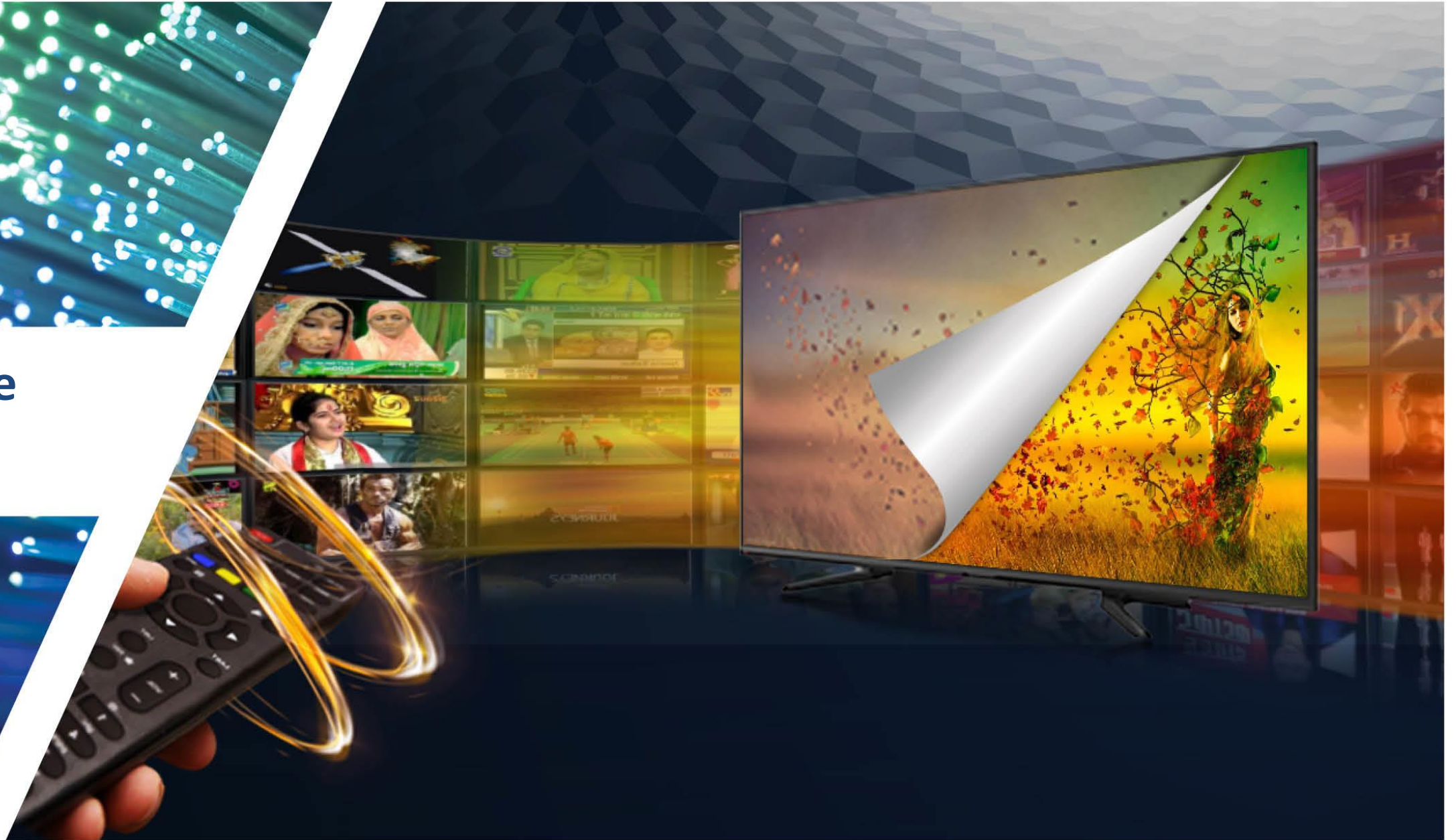
In ₹ Mn

Particulars	Q3 FY20 Ex. EPC Contract	Q3 FY20 EPC Contract	Q3 FY20 Total	Q2 FY20 Ex. EPC Contract	Q2 FY20 EPC Contract	Q2 FY20 Total	Q-o-Q% (Ex. EPC)	Q3 FY19	Y-o-Y% (Ex. EPC)	9M FY20 Ex. EPC Contract	9M FY20 EPC Contract	9M FY20 Total	9M FY19	9M-o- 9M% (Ex. EPC)	FY19
Revenue															
Subscription CATV	2,581	-	2,581	2,608	-	2,608	-1%	1,798	44%	7,661	-	7,661	5,249	46%	7,332
Revenue from EPC contract	-	2,377	2,377	-	1,694	1,694	0%	-	0%	-	4,691	4,691	-	0%	-
Broadband ISP	422	-	422	398	-	398	6%	362	17%	1,213	-	1,213	1,078	13%	1,442
Placement / Carriage / Marketing Incentive	1,036	-	1,036	997	-	997	4%	712	46%	2,741	-	2,741	2,089	31%	2,610
Activation	274	-	274	360	-	360	-24%	234	17%	864	-	864	700	23%	939
Other Operating Income	50	-	50	32	-	32	54%	40	26%	115	-	115	118	-3%	136
Other Income	136	-	136	74	-	74	84%	54	151%	286	12	298	170	68%	433
Total Income	4,499	2,377	6,875	4,470	1,694	6,164	1%	3,199	41%	12,879	4,703	17,582	9,404	37%	12,892
Expenditure															
Pay Channel Cost	2,125	-	2,125	1,982	-	1,982	7%	1,377	54%	5,909	-	5,909	3,965	49%	5,138
EPC cost of material consumed & sub contracting cost	-	2,212	2,212	-	1,579	1,579	0%	-	0%	-	4,370	4,370	-	0%	-
Employee Cost	361	-	361	401	-	401	-10%	376	-4%	1,115	-	1,115	1,088	2%	1,471
Other Operating Expense	217	-	217	233	-	233	-7%	240	-9%	664	-	664	664	0%	883
Administrative expense	608	-	608	698	-	698	-13%	373	63%	1,745	-	1,745	1,108	57%	1,784
Total Expenditure	3,311	2,212	5,523	3,314	1,579	4,893	0%	2,366	40%	9,433	4,370	13,803	6,825	38%	9,276
EBITDA	1,188	165	1,352	1,156	115	1,271	3%	833	43%	3,447	332	3,779	2,579	34%	3,615
EBITDA %	26.4%	6.9%	19.7%	25.9%	6.8%	20.6%		26.0%		26.8%	7.1%	21.5%	27.4%		28.0%
Depreciation/Amortization	600	-	600	569	-	569	6%	466	29%	1,697	-	1,697	1,437	18%	2,019
Finance cost	99	-	99	93	(0)	93	7%	59	69%	308	8	316	402	-23%	514
Profit before Tax & Exceptional item	488	165	653	494	115	609	-1%	309	58%	1,441	324	1,765	740	95%	1,082
Exceptional item / Share of Profit/(Loss) from Associate and JVs	(4)		(4)	(4)	-	(4)		2		(6)	-	(6)	(2)		(650)
PBT	484	165	649	491	115	606	-1%	310	56%	1,435	324	1,759	737	95%	432
Tax	218	42	259	232	25	256		113		606	82	688	254		185
PAT before Other Comprehensive Income	267	123	390	259	91	349	3%	197	35%	829	242	1,072	483	72%	248
(Add)/Less : Share of Non Controlling Interest	(59)		(59)	(61)	-	(61)		(12)		(158)	-	(158)	(17)		(59)
Add/(Less) Other Comprehensive Income	(2)		(2)	(4)	-	(3)		-		(6)	-	(6)	7		3
PAT	205	123	328	194	91	285	6%	185	11%	665	242	908	473	41%	191

Note : Exceptional items provided in books amounting ₹ 650 Mn during FY19 due to change in pricing mechanism between industry stakeholders in the value chain post implementation of New Tariff Order



Standalone Financials



Financial Highlights : Standalone*

(Ex EPC)

1 Revenue



Total Revenue up by 43% 9M-o-9M; 54% Y-o-Y & 6% Q-o-Q
Subscription Revenue up by 50% 9M-o-9M & 52% Y-o-Y

2 Expenses



Finance cost down by 26% 9M-o-9M
Other Operating Expense down by 40% 9M-o-9M; 43% Y-o-Y

3 EBITDA



EBITDA of ₹ 2,307 Mn for 9M FY20; ₹ 788 Mn for Q3 FY20
Up by ₹ 624 Mn (37%) 9M-o-9M; ₹ 14 Mn Q-o-Q
EBITDA Margin stands at 26.3% for 9M FY20

4 PAT



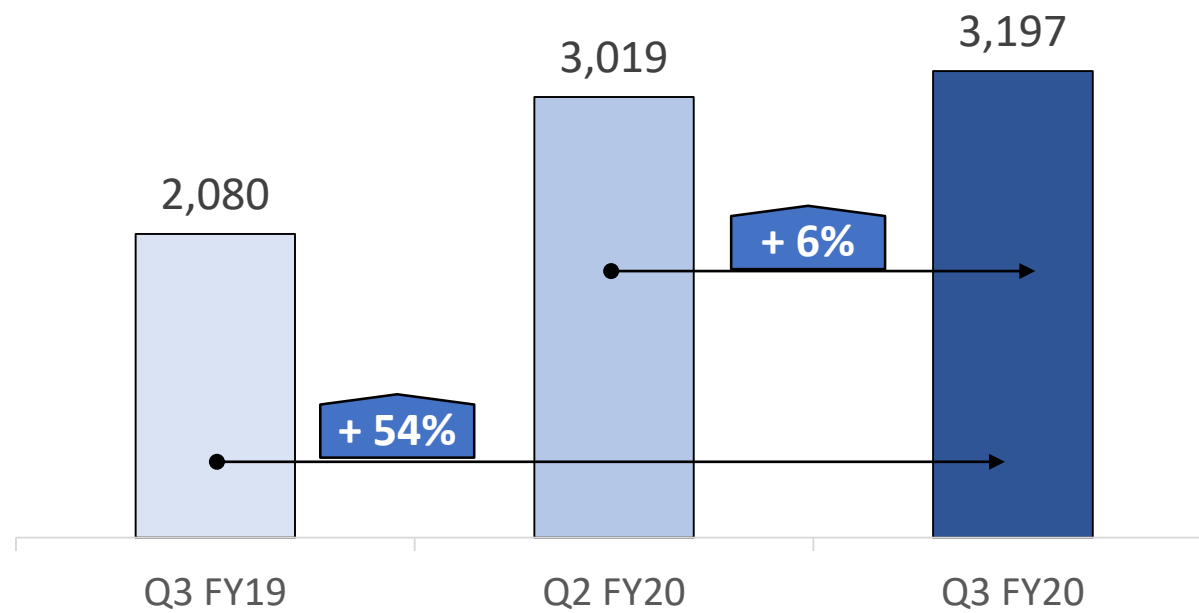
PAT of ₹ 603 Mn for 9M FY20; Up by ₹ 272 Mn (82%) 9M-o-9M



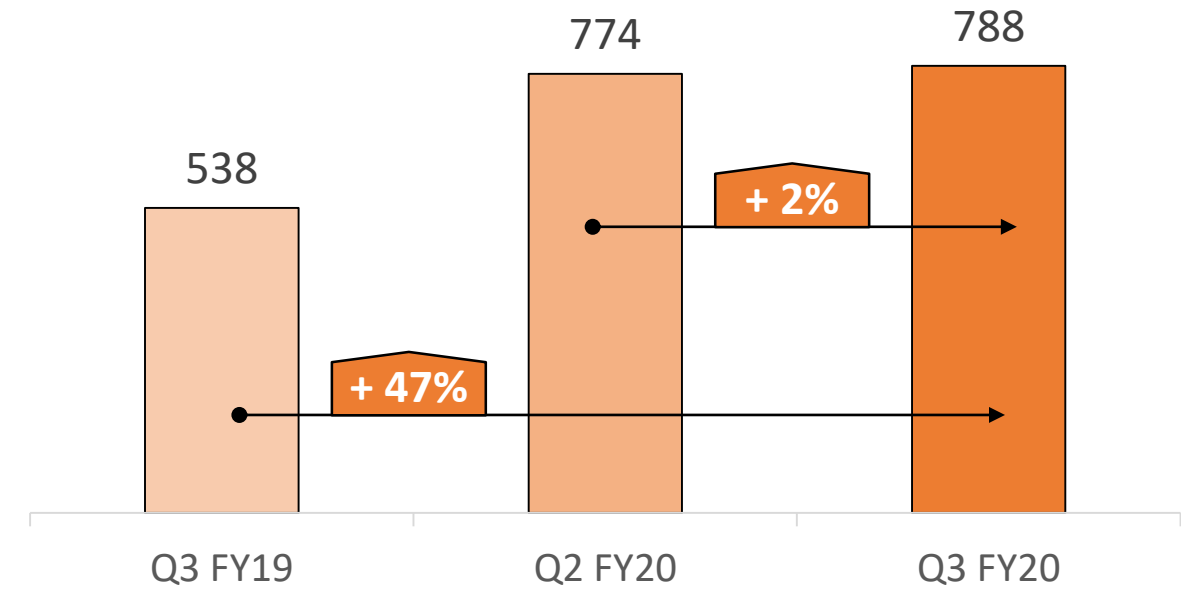
Financial Performance : Standalone*

(Ex EPC)

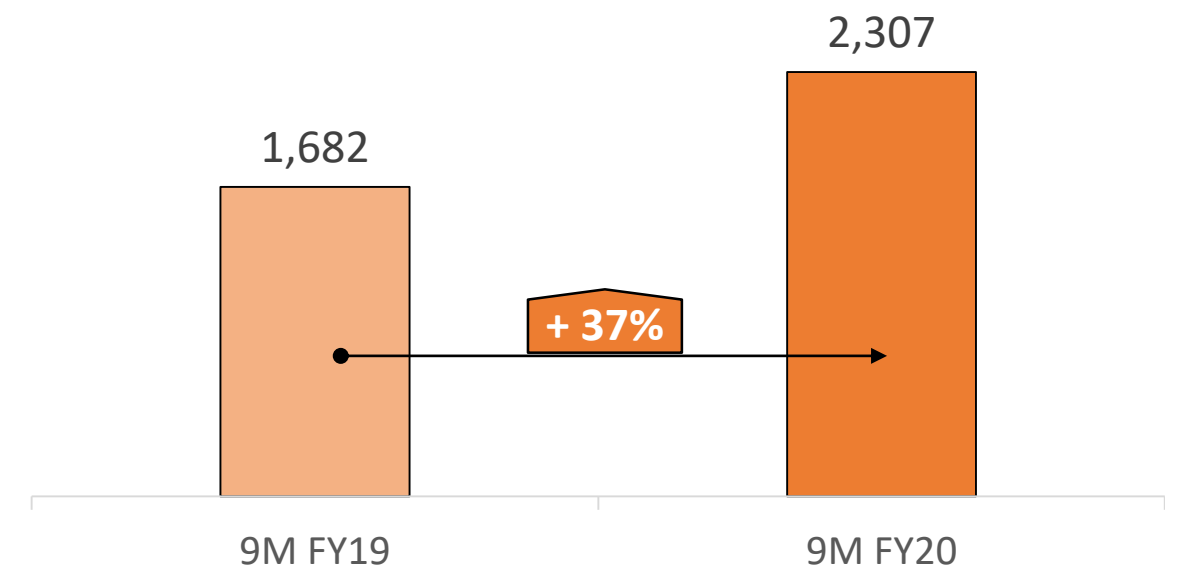
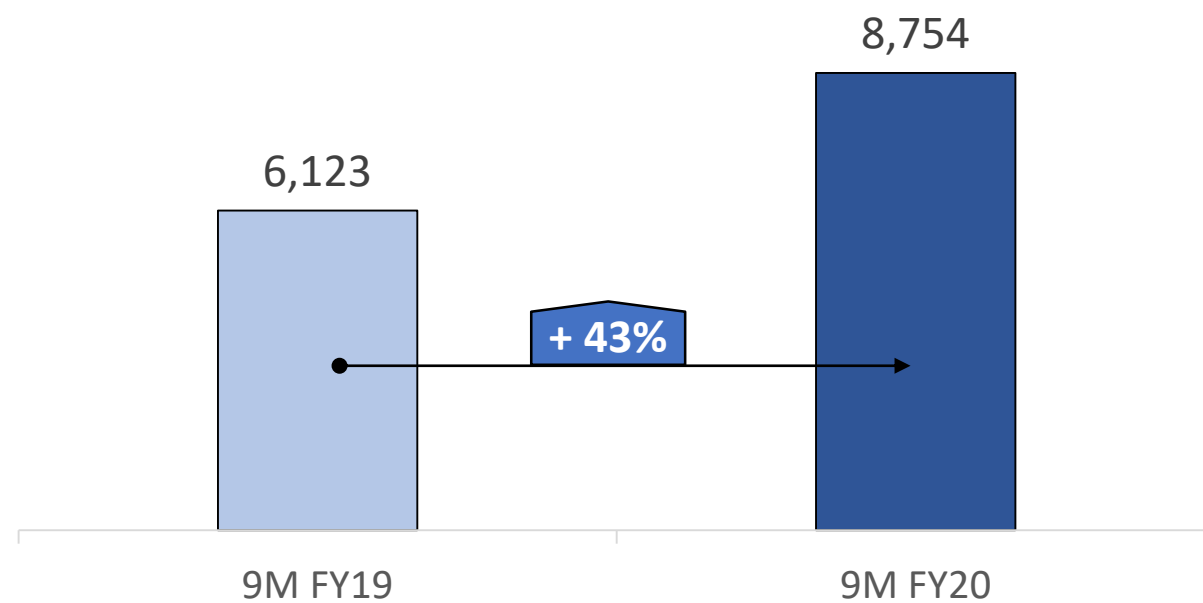
Total Revenue (In ₹ Mn)



EBITDA (In ₹ Mn)



9 Months



* FY = Apr-Mar, Q1 =Apr-Jun, Q2= Jul-Sep, Q3= Oct-Dec, 9M= Apr-Dec

Note : Financial figures are excluding EPC contract



Profit & Loss Statements : Standalone *

In ₹ Mn

Particulars	Q3 FY20	Q3 FY20	Q3 FY20 Total	Q2 FY20	Q2 FY20	Q2 FY20 Total	Q-o-Q% (Ex. EPC)	Q3 FY19	Y-o-Y % (Ex. EPC)	9M FY20	9M FY20	9M FY20 Total	9M FY19	9M-o- 9M%	FY19
	Ex. EPC Contract	EPC Contract		Ex. EPC Contract	EPC Contract					Ex. EPC Contract	EPC Contract		Ex. EPC Contract	EPC Contract	
Revenue															
Subscription CATV	1,784	-	1,784	1,734	-	1,734	3%	1,171	52%	5,150	-	5,150	3,439	50%	4,942
Revenue from EPC contract	-	2,377	2,377	-	1,694	1,694	0%	-	0%	(0)	4,691	4,691	-	--	-
Placement	1,073	-	1,073	942	-	942	14%	652	65%	2,682	-	2,682	1,919	40%	2,398
Activation	171	-	171	218	-	218	-22%	161	6%	545	-	545	491	11%	645
Other Operating Income	84	-	84	97	-	97	-14%	50	68%	228	-	228	160	42%	202
Other Income	85	-	85	27	-	27	210%	46	83%	150	12	161	115	30%	240
Total Income	3,197	2,377	5,574	3,019	1,694	4,713	6%	2,080	54%	8,754	4,703	13,456	6,123	43%	8,428
Expenditure															
Pay Channel Cost	1,712	-	1,712	1,601	-	1,601	7%	1,026	67%	4,652	-	4,652	2,908	60%	3,805
EPC cost of material consumed & sub contracting cost	-	2,212	2,212	-	1,579	1,579	0%	-	0%	(0)	4,370	4,370	-	--	-
Employee Cost	171	-	171	170	-	170	1%	141	21%	498	-	498	428	16%	569
Other Operating Expense	84	-	84	88	-	88	-5%	146	-43%	259	-	259	431	-40%	545
Administrative expense	444	-	444	387	-	387	15%	228	95%	1,038	-	1,038	674	54%	1,030
Total Expenditure	2,409	2,212	4,621	2,245	1,579	3,824	7%	1,542	56%	6,447	4,370	10,818	4,441	45%	5,949
EBITDA	788	165	952	774	115	889	2%	538	47%	2,307	332	2,639	1,682	37%	2,479
EBITDA %	24.6%	6.9%	17.1%	25.6%	6.8%	18.9%		25.8%		26.3%	7.1%	19.6%	27.5%		29.4%
Depreciation/Amortization	335	-	335	326	-	326	3%	294	14%	983	-	983	878	12%	1,252
Finance cost	73	-	73	73	(0)	73	-1%	35	106%	227	8	235	308	-26%	392
Profit before Tax & Exceptional item	380	165	544	374	115	489	2%	208	82%	1,097	324	1,421	496	121%	835
Exceptional item	-	-	-	-	-	-		-		-	-	-	-		(550)
PBT	380	165	544	374	115	489	2%	208	82%	1,097	324	1,421	496	121%	285
Tax	155	42	197	212	25	237		73		487	82	569	169		140
PAT before Other Comprehensive Income	225	123	348	162	91	252	39%	135	66%	609	242	852	327	86%	145
Add/(Less) Other Comprehensive Income	-	-	-	(6)	-	(6)				(6)		(6)	4		1
PAT	225	123	348	156	91	246	44%	135	66%	603	242	846	331	82%	145

Note : Exceptional items provided in books amounting ₹ 550 Mn during FY19 due to change in pricing mechanism between industry stakeholders in the value chain post implementation of New Tariff Order



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Invitation to GTPL Hathway Ltd.
3QFY20 Earnings Conference Call



Maybank Kim Eng is pleased to host, on behalf of GTPL Hathway Ltd. a Conference Call on Friday 10th January 2020 (04:00pm India Time) following the announcement of financial results for the quarter December 2019.

The call will be initiated with a brief management discussion on the earning performance followed by an interactive Question & Answer session.

The Management will be represented by
Mr. Anirudhsinh Jadeja – Promoter & Managing Director
Mr. Rajan Gupta – Chairman and Non Executive Director
Mr. Piyush Pankaj – Head - CATV Business & Chief Strategy Officer
Mr. Anil Bothra – Chief Financial Officer

Date: 10th January 2020

Time:
04:00 PM - India
06:30 PM - Hong Kong/Singapore
02:30 AM - USA (Pacific time)
10:30 AM - London

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THANK YOU

