

03<sup>rd</sup> November, 2020

**National Stock Exchange of India Limited**

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Plot No. C/1, G Block,  
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**BSE Limited**

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**Company Code: PVR / 532689**

**Sub: Quarter 2 & Half Year for FY 2020-21 – Investor Presentation**

Dear Sir / Madam,

Please find attached presentation on Investor update for 2<sup>nd</sup> quarter and half year for Financial Year 2020-21.

This is for your information and records.

Thanking You.

Yours faithfully,  
For **PVR Limited**

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

A photograph of a luxury lounge area. The scene features several brown leather recliners arranged in rows. Each recliner has a yellow quilted pillow with a dark geometric pattern. Small round wooden side tables are attached to the recliners, holding water bottles and napkins. In the foreground, a side table with a glowing number '8' is visible. The background shows more recliners and decorative lamps with patterned shades. The entire image is framed by a large yellow curved shape on the right side.

**PVR**  
**INVESTOR UPDATE**  
**Q2 & H1, FY 2020-21**

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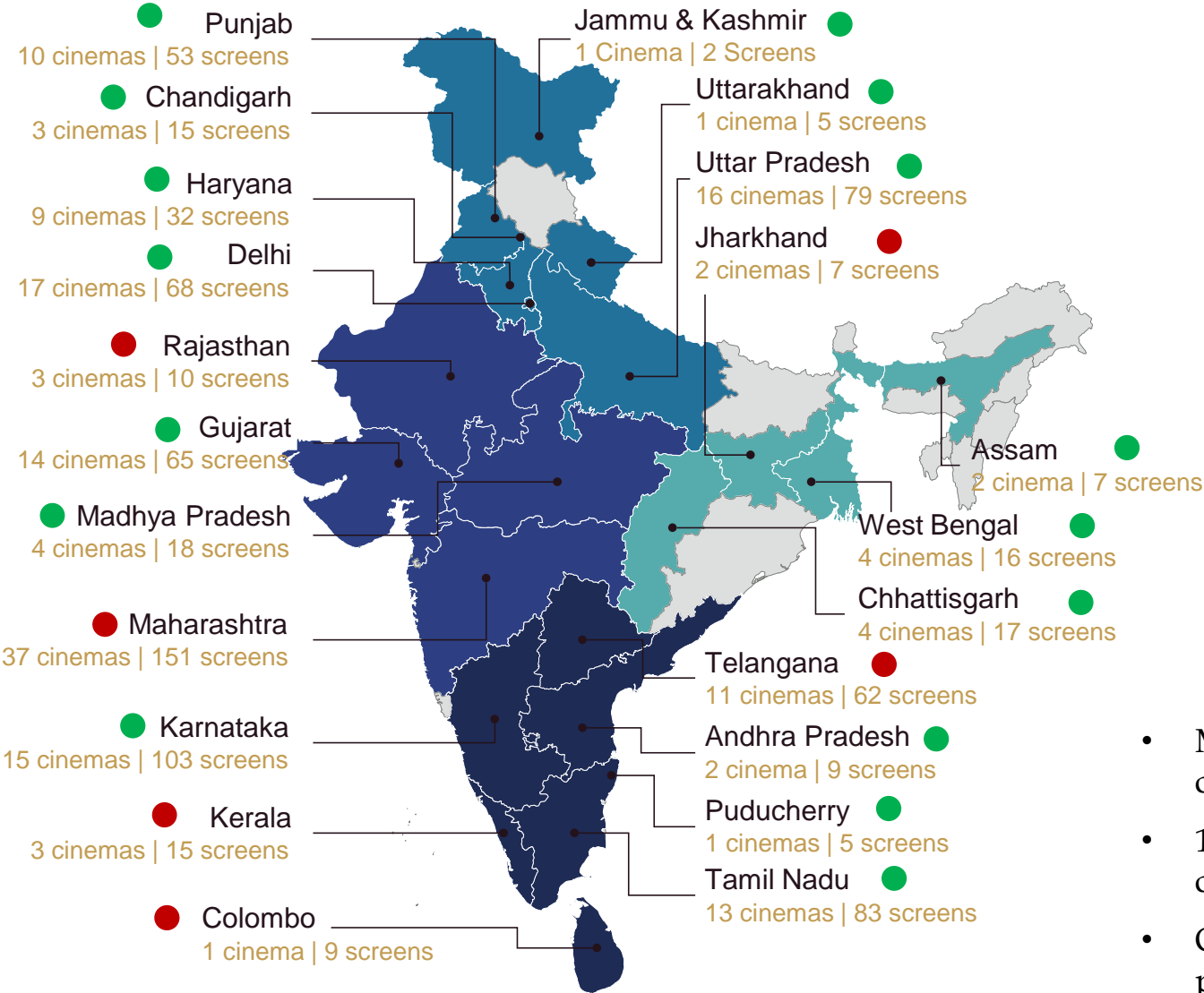
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**PARTICULARS****SLIDE NO****Status Update On Reopening Of Cinemas****5****Consolidated Results Summary****6****Key Initiatives****17***- Promotions & Offers***18***- Film Festivals***20***- F&B Initiatives***21****Strong Line Up Of Movies****22**

# Status Update On Reopening Of Cinemas



**173 CINEMAS**

**178K SEATS**

**831 SCREENS**

**71 CITIES**

SCREENS BY REGION		
Region	Current	% of total
South	286	34%
West	244	29%
North	254	31%
East	47	6%
<b>TOTAL</b>	<b>831</b>	

- Ministry of Home Affairs in Unlock 5.0 guidelines allowed cinemas to reopen from 15<sup>th</sup> October onwards with 50% capacity
- 16 states and UTs, where PVR has presence, have permitted cinemas to restart operations
- Out of total 831 screens of the company 575+ have received permission to reopen

Note: [1] Numbers as on date  
 During the quarter the company has shutdown 3 properties with 14 screens on account of expiry of leases.

● Opened ● Closed





# CONSOLIDATED RESULT SUMMARY



## Results Highlights - Q2, FY 20-21 vs Q2, FY 19-20

	Total Income INR Lacs	EBITDA INR Lacs	PAT INR Lacs
<b>Q2, FY21</b>	4,359	(8,101)	(11,617)
<b>Q2, FY20</b>	97,940	20,064	6,597

## Results Highlights - H1, FY 20-21 vs H1, FY 19-20

	Total Income INR Lacs	EBITDA INR Lacs	PAT INR Lacs
<b>H1, FY21</b>	5,617	(19,704)	(25,724)
<b>H1, FY20</b>	186,656	36,610	11,019

Performance for the period was impacted led by COVID 19 induced lockdown





# Consolidated Result Summary - Q2, FY 20-21 vs Q2, FY 19-20

Particulars (INR Lacs)	Q2, FY 21			Q2, FY 20		
	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted
Total Income	11,061	6,702	4,359	97,940	0	97,940
Expenses	12,461	0	12,461	65,510	-12,366	77,876
<b>EBITDA</b>	<b>-1,400</b>	<b>6,702</b>	<b>-8,101</b>	<b>32,430</b>	<b>12,366</b>	<b>20,064</b>
<b>EBITDA Margin</b>				<b>33.1%</b>		<b>20.5%</b>
Depreciation & Amortization	14,188	8,361	5,827	13,952	7,970	5,982
<b>EBIT</b>	<b>-15,588</b>	<b>-1,659</b>	<b>-13,929</b>	<b>18,478</b>	<b>4,396</b>	<b>14,082</b>
Finance Costs	12,288	8,776	3,512	11,113	7,209	3,904
<b>PBT</b>	<b>-27,920</b>	<b>-10,435</b>	<b>-17,485</b>	<b>7,349</b>	<b>-2,814</b>	<b>10,162</b>
Corporate Tax	-9,514	-3,646	-5,868	2,582	-983	3,565
<b>PAT</b>	<b>-18,406</b>	<b>-6,789</b>	<b>-11,617</b>	<b>4,767</b>	<b>-1,830</b>	<b>6,597</b>
<b>PAT Margin</b>				<b>4.9%</b>		<b>6.7%</b>
Non-controlling interests	11		11	21		21
<b>PAT after adjustment of non-controlling interests</b>	<b>-18,395</b>	<b>-6,789</b>	<b>-11,606</b>	<b>4,788</b>	<b>-1,830</b>	<b>6,618</b>
EPS - Basic (INR)	-33.76		-21.31	9.71		13.44
EPS - Diluted (INR)	-33.76		-21.31	9.66		13.37

# Consolidated Result Summary - H1, FY 20-21 vs H1, FY 19-20

Particulars (INR Lacs)	H1, FY 21			H1, FY 20		
	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted
Total Income	16,596	10,979	5,617	1,86,656	0	1,86,656
Expenses	25,322	0	25,322	1,25,691	-24,355	1,50,046
<b>EBITDA</b>	<b>-8,726</b>	<b>10,979</b>	<b>-19,704</b>	<b>60,965</b>	<b>24,355</b>	<b>36,610</b>
<b>EBITDA Margin</b>				<b>32.7%</b>		<b>19.6%</b>
Depreciation & Amortization	28,639	16,778	11,861	26,538	15,063	11,475
<b>EBIT</b>	<b>-37,365</b>	<b>-5,800</b>	<b>-31,565</b>	<b>34,427</b>	<b>9,292</b>	<b>25,135</b>
Finance Costs	24,688	17,649	7,039	24,256	16,208	8,048
<b>PBT</b>	<b>-62,112</b>	<b>-23,449</b>	<b>-38,663</b>	<b>10,145</b>	<b>-6,916</b>	<b>17,061</b>
Corporate Tax	-21,133	-8,194	-12,939	3,625	-2,417	6,042
<b>PAT</b>	<b>-40,979</b>	<b>-15,255</b>	<b>-25,724</b>	<b>6,520</b>	<b>-4,499</b>	<b>11,019</b>
<b>PAT Margin</b>				<b>3.5%</b>		<b>5.9%</b>
Non-controlling interests	22		22	25		25
<b>PAT after adjustment of non-controlling interests</b>	<b>-40,957</b>	<b>-15,255</b>	<b>-25,702</b>	<b>6,545</b>	<b>-4,499</b>	<b>11,044</b>
EPS - Basic (INR)	-76.85		-48.24	13.27		22.43
EPS - Diluted (INR)	-76.85		-48.24	13.20		22.31



Q2, FY20-21 vs Q2, FY19-20; H1, FY20-21 vs H1, FY19-20

Particulars (INR Lacs)	Q2, FY 21	Q2, FY 20	% Change	H1, FY 21	H1, FY 20	% Change
Income from sale of movie tickets	60	49,184	-100%	60	94,843	-100%
Sales of Food & Beverages	373	27,279	-99%	508	53,615	-99%
Advertisement Income	0	9,383	-100%	0	18,539	-100%
Income from movie distribution	2,754	5,611	-51%	3,046	7,349	-59%
Other Income	1,172	6,483	-82%	2,003	12,310	-84%
<b>Total Income</b>	<b>4,359</b>	<b>97,940</b>	<b>-96%</b>	<b>5,617</b>	<b>1,86,656</b>	<b>-97%</b>

- Sale of F&B represents revenue from sale of F&B products from our subsidiary Zea Maize and PVR Lanka.
- Income from movie distribution includes income from sale and distribution of movie rights from our subsidiary PVR Pictures.
- Other income\* includes interest income, gain on redemption of MF/investments, convenience fee and other non operating income.

Performance for the quarter and half year was impacted due to COVID -19 induced lockdown

Note: Above financial numbers are excluding Ind AS 116 "Leases" impact.

\* Convenience fee represents notional income recognised in the P&L for income received in advance from ticketing aggregators as required under Ind AS : 115 - "Revenue from contracts with customers"

# Fixed Expenditure Analysis (Consolidated)

## Q2, FY20-21 vs Q2, FY19-20 vs Q1, FY20-21

Particulars (INR Lacs)	Q2, FY 21	Q2, FY 20	% Change	Q1, FY 21	% Change
Screens	831	800	4%	845	-2%
Seats	177,877	175,260	1%	181,917	-2%
Employee Benefit Expense	4,069	10,494	-61%	6,817	-40%
Electricity and water charges	838	5,709	-85%	595	41%
Other Expenses (ex Rent & CAM)	2,480	9,524	-74%	2,538	-2%
<b>Total Expenses excl. Rent and CAM</b>	<b>7,387</b>	<b>25,727</b>	<b>-71%</b>	<b>9,950</b>	<b>-26%</b>
<b>Expenses per Month#</b>	<b>2,431</b>	<b>8,576</b>	<b>-72%</b>	<b>3,233</b>	<b>-25%</b>
Rent	0	14,842	-100%	0	0%
Common area maintenance	2,571	3,878	-34%	2,802	-8%
<b>Total Expenses</b>	<b>9,958</b>	<b>44,447</b>	<b>-78%</b>	<b>12,752</b>	<b>-22%</b>
<b>Expenses per Month</b>	<b>3,288</b>	<b>14,816</b>	<b>-78%</b>	<b>4,167</b>	<b>-21%</b>

- Rent and CAM negotiations currently underway (Refer Slide: 13 for details)
- Significant reduction in personnel cost through manpower & cost rationalisation
- Continued focus on reducing all other fixed expenses

#Expense per month is after removing one time inventory write off of Rs 94 Lac in Q2 FY21 and Rs 252 Lac in Q1 FY21



# Fixed Expenditure Analysis (Consolidated)

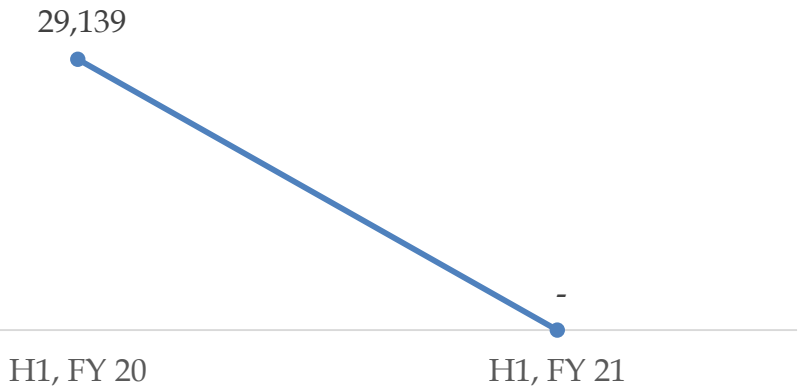
H1, FY20-21 vs H1, FY19-20 vs H2 FY19-20

Particulars (INR Lacs)	H1, FY 21	H1, FY 20	% Change
Employee Benefit Expense	10,886	21,059	-48%
Electricity and water charges	1,433	11,590	-88%
Other Expenses (ex Rent & CAM)	5,018	18,781	-73%
<b>Total Expenses excluding Rent and CAM</b>	<b>17,337</b>	<b>51,430</b>	<b>-66%</b>
<b>Expenses per Month</b>	<b>2,832</b>	<b>8,572</b>	<b>-67%</b>
Rent	0	29,139	-100%
Common area maintenance	5,373	7,615	-29%
<b>Total Expenses</b>	<b>22,710</b>	<b>88,184</b>	<b>-74%</b>
<b>Expenses per Month</b>	<b>3,727</b>	<b>14,697</b>	<b>-75%</b>

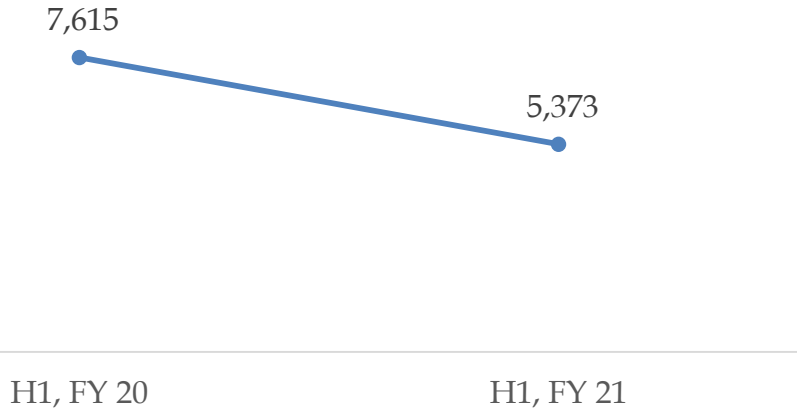
- Rent and CAM negotiations currently underway (Refer Slide: 13 for details)
- Significant reduction in personnel cost through manpower & cost rationalisation
- Continued focus on reducing all other fixed expenses

#Expense per month is after removing one time inventory write off of Rs 346 Lac in H1 FY21

### Rent (INR Lacs)



### CAM (INR Lacs)



### RENT

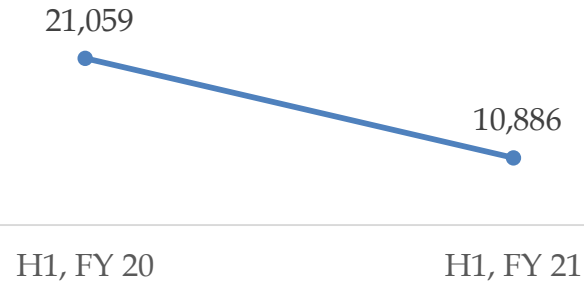
- Settlements reached with developers in more than 60% of cinemas;
  - Complete rent waiver for lockdown period
  - reduced rent / revenue share post opening
- Discussions with balance developers in progress and expected to close once cinemas are allowed to reopen in those states.

### CAM

- Settlements reached with developers in more than 60% of cinemas with either complete waiver or at reduced CAM during the lockdown period.
- Discussions with balance developers in progress and expected to close once cinemas are allowed to reopen in those states.
- Expect discounts between 30%-50% on final settlement.



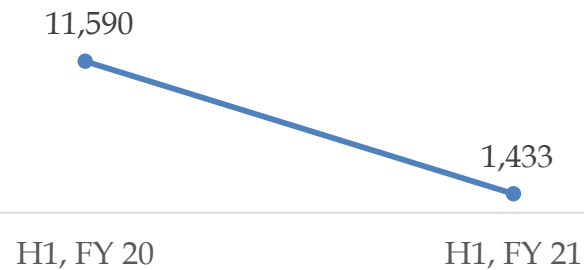
## Personnel Expenses (INR Lacs)



### Personnel Expenses:

- Continued manpower rationalisation; headcount reduced 11,073 on Mar 31, 2020 to 6,241 on Sep 30, 2020
- Temporary salary cuts of between 25%~ 50% implemented across organisation
- H1, FY21 cost includes one time expense of ~INR 8.6 Cr on account of full and final settlement for left employees.

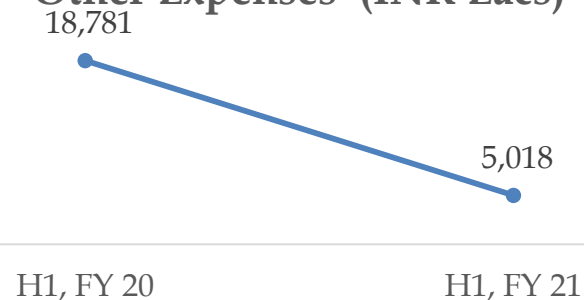
## Electricity & Water Charges



### Electricity & Water Charges

- Savings of 88% vs H1, FY 20 due to closure of Cinemas.

## Other Expenses (INR Lacs)



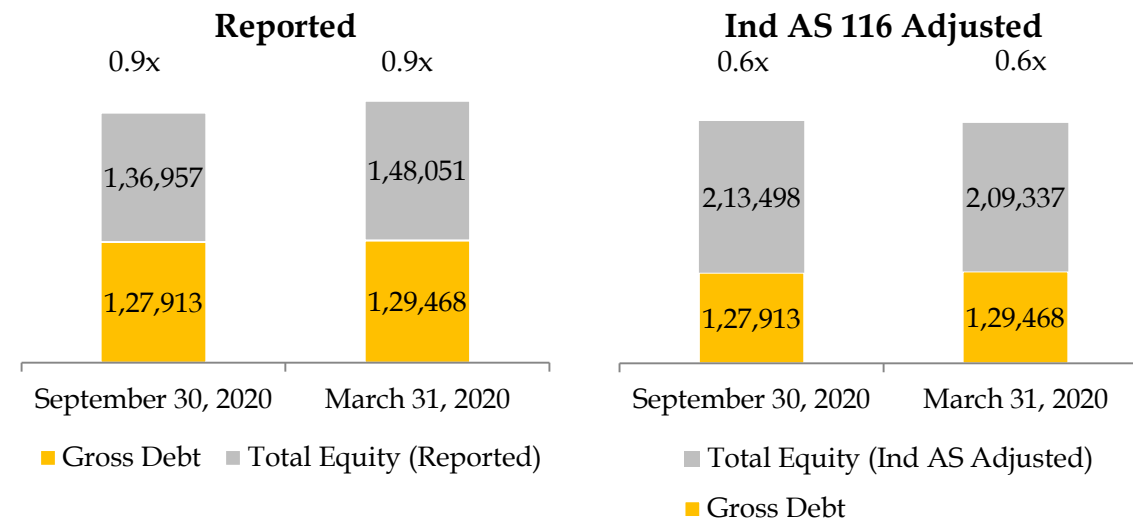
### Other Expenses

- Overheads down 73% vs H1, FY 20 due to cost control initiatives

# Consolidated Balance Sheet

Particulars (INR Lacs)	Reported	
	September 30, 2020	March 31, 2020
<b>Total Shareholder funds</b>	1,36,957	1,48,051
Equity Share Capital	5,517	5,135
Other Equity	1,31,433	1,42,887
Non-Controlling Interest	7	29
<b>Total Debt</b>	1,27,913	1,29,468
Long Term Borrowings	1,08,158	1,10,734
Short Term Borrowings	19,755	18,734
Lease Liability	3,86,757	377,147
Other Non Current Liabilities	14,218	17,566
<b>Total Sources of Funds</b>	<b>6,65,845</b>	<b>6,72,232</b>
Net Fixed Assets Incl. CWIP	1,94,242	1,98,397
Goodwill	1,05,204	1,05,204
Right of Use assets (ROU)	2,86,225	3,00,473
Financial Assets	26,773	26,234
Other Non Current Assets	57,028	37,251
Cash & Cash Equivalents	37,719*	32,347 <sup>#</sup>
Current Assets	25,812	43,014
Less: Current Liabilities	67,158	70,688
Net Current Assets	-41,346	-27,674
<b>Total Assets</b>	<b>6,65,845</b>	<b>6,72,232</b>

## Gross Debt / Equity (INR Lacs)



Net Debt (INR Lacs)	September 30, 2020	March 31, 2020
Gross Debt	1,27,913	1,29,468
Cash & Cash Equivalents	37,719	32,347
<b>Net Debt</b>	<b>90,194</b>	<b>97,121</b>

\* includes deposits (Rs. 690 Lac) and Investments (Rs. 103 Lac) as security towards government authorities.

# includes deposits (Rs. 671 Lac) and Investments (Rs. 117 Lac) as security towards government authorities.

Particulars	INR Lakhs
Profit / (loss) before tax	-62,112
Add : Depreciation	28,639
Add: Finance Cost	24,571
Add: Share In Net Profit/(Loss) Of Joint Venture	59
Less : Ind AS 116 adjustments for rent waivers (Incl. lease liabilities reversal)	-10,861
<b>EBITDA</b>	<b>-19,704</b>
Less : Working capital and other non-cash adjustments	1,276
<b>Cash Flow from operations</b>	<b>-18,428</b>
Less: Payment for Capex creditors	-4,191
<b>Cash Flow from Investing activities</b>	<b>-4,191</b>
Add : Rights issue funding (Net of expenses)	29,754
Add: Net Change in borrowings	2,229
Less : Interest paid	-3,998
<b>Cash Flow from financing activities</b>	<b>27,985</b>
<b>Net (decrease)/increase in cash and cash equivalents</b>	<b>5,366</b>
Opening Cash and cash equivalent	31,559
<b>Closing Cash and Cash equivalents</b>	<b>36,926</b>



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18<sup>TH</sup> TO 23<sup>RD</sup> SEPTEMBER




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**IRRFAN KHAN, RISHI KAPOOR & SUSHANT SINGH RAJPUT**

DATE 18<sup>TH</sup> - 20<sup>TH</sup> SEP



FOR SHOW TIMES AND BOOKING VISIT THE PVR APP/WEBSITE

**NOZAN**  
FILM FESTIVAL

17<sup>TH</sup> - 23<sup>RD</sup> OCTOBER 2020

**PVR IMAX**

CATCH CHRISTOPHER NOLAN'S BEST. ON THE BEST FORMAT FOR THE BIGGEST BLOCKBUSTERS!



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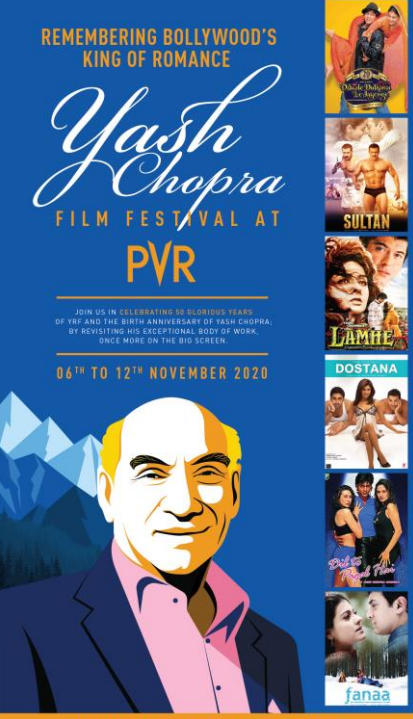
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REMEMBERING BOLLYWOOD'S KING OF ROMANCE

*Yash Chopra*  
FILM FESTIVAL AT  
**PVR**

JOIN US IN CELEBRATING 40 GLORIOUS YEARS OF YFC AND THE BIRTH ANNIVERSARY OF YASH CHOPRA, BY REVISITING HIS EXCEPTIONAL BODY OF WORK, ONCE MORE ON THE BIG SCREEN.

06<sup>TH</sup> TO 12<sup>TH</sup> NOVEMBER 2020



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### F&B Initiatives for Immediate Implementation

FOOD & PACKAGING SERVICE



QR Food Ordering



Segregating Ordering & Pickup



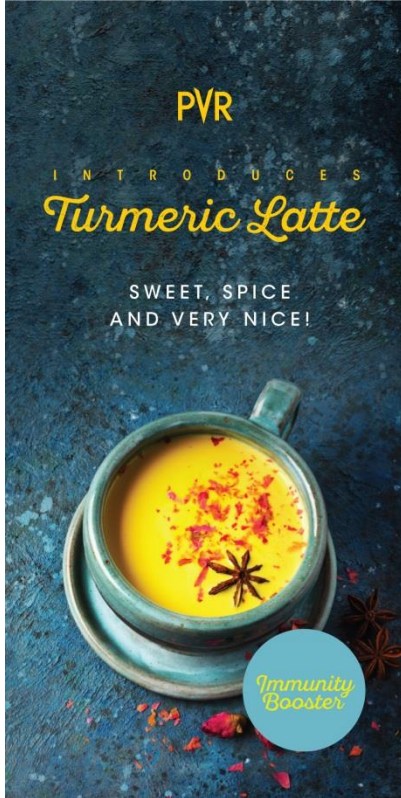
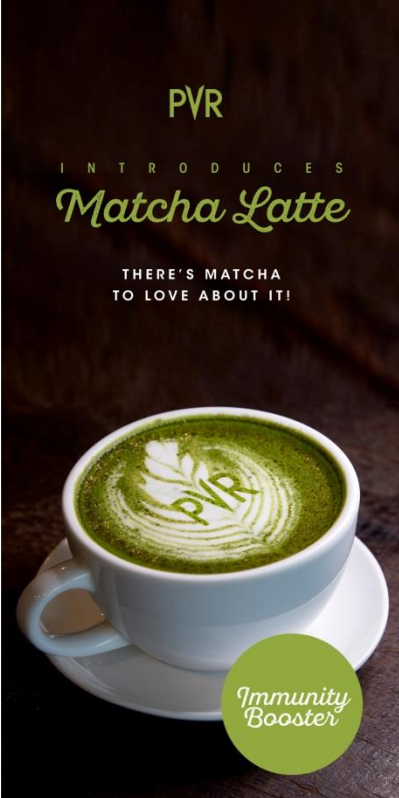
UVC Sterilization & Packaging



Truncated Menu



Immunity Booster Menu







**STRONG LINE UP OF  
MOVIES**

**WE  
TAKE**

# I BOLLYWOOD CONTENT PIPELINE



# BOLLYWOOD CONTENT PIPELINE



83

**CAST**  
Ranveer Singh,  
Deepika Padukone,  
Tahir Raj Bhasin

**DIRECTOR**  
Kabir Khan



SARDAR UDHAM SINGH

**CAST**  
Vicky Kaushal,  
Stephen Hogan

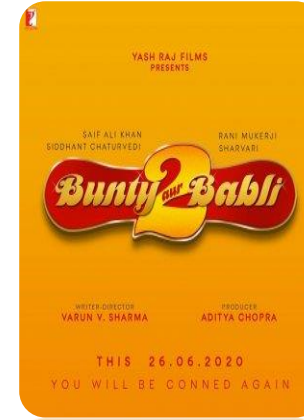
**DIRECTOR**  
Shoojit Sircar



SOORYAVANSHI

**CAST**  
Akshay Kumar,  
Katrina Kaif,  
Anupam Kher

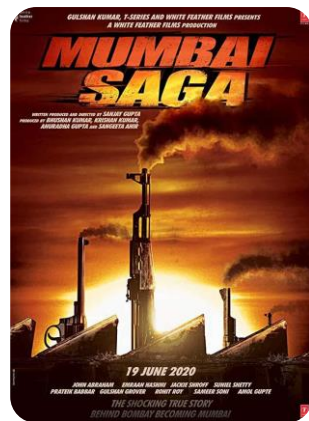
**DIRECTOR**  
Rohit Shetty



BUNTY AUR BABLI 2

**CAST**  
Rani Mukherji, Saif Ali Khan,  
Siddhant Chaturvedi,  
Sharvari Wagh

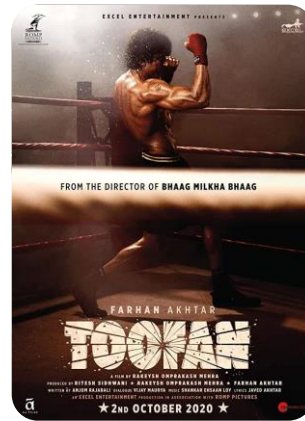
**DIRECTOR**  
Varun V Sharma



MUMBAI SAGA

**CAST**  
John Abraham,  
Sunil Shetty,  
Emraan Hashmi

**DIRECTOR**  
Sanjay Gupta



TOOFAN

**CAST**  
Farhan Akhtar,  
Isha Talwar,  
Paresh Rawal

**DIRECTOR**  
Rakeysh Omprakash Mehra



KGF 2

**CAST**  
Sanjay Dutt,  
Yash,  
Srinidhi Shetty

**DIRECTOR**  
Prashanth Neel



JAYESH BHAI JORDAAR

**CAST**  
Ranveer Singh,  
Shalini Pandey,  
Boman Irani

**DIRECTOR**  
Krishna Bhatt

# I HOLLYWOOD CONTENT PIPELINE



# HOLLYWOOD CONTENT PIPELINE



## TENET

**CAST**  
John David Washington,  
Robert Pattinson,  
Elizabeth Debicki

**DIRECTOR**  
Christopher Nolan



## WONDER WOMAN 1984

**CAST**  
Kristen Wiig,  
Gal Gadot,  
Connie Nielsen

**DIRECTOR**  
Patty Jenkins



## GHOSTBUSTERS AFTER LIFE

**CAST**  
Finn Wolfhard,  
Mckenna Grace,  
Carrie Coon

**DIRECTOR**  
Jason Reitman



## PETER RABBIT 2

**CAST**  
James Corden,  
Elizabeth Debicki,  
Lennie James

**DIRECTOR**  
Will Gluck



## FREE GUY

**CAST**  
Taika Waititi,  
Ryan Reynolds,  
Jodie Comer

**DIRECTOR**  
Shawn Levy



## THE KING'S MAN

**CAST**  
Aaron Taylor-Johnson,  
Gemma Arterton,  
Matthew Goode

**DIRECTOR**  
Matthew Vaughn



## MONSTER HUNTER

**CAST**  
Milla Jovovich, Tony Jaa, Tip  
"T.I" Harris, Meagan Good

**DIRECTOR**  
Paul W. S. Anderson



## TOM & JERRY

**CAST**  
Chloë Grace Moretz,  
Michael Peña,  
Rob Delaney

**DIRECTOR**  
Tim Story

# I REGIONAL CONTENT PIPELINE

# REGIONAL CONTENT PIPELINE



**MASTER**  
[TAMIL]

**CAST**  
Joseph Vijay,  
Vijay Sethupathi,  
Andrea Jeremiah

**DIRECTOR**  
Lokesh Kanagaraj



**COBRA**  
[PTAMIL]

**CAST**  
Vikram,  
Srinidhi Shetty,  
Irfan Pathan

**DIRECTOR**  
R. Ajay Gnanamuthu



**JAGAME THANTHIRAM**  
[TAMIL]

**CAST**  
James Cosmo,  
Dhanush,  
Decca Heggie

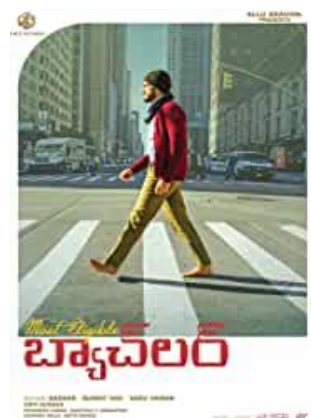
**DIRECTOR**  
Karthik Subbaraj



**DOCTOR**  
[TAMIL]

**CAST**  
Sivakarthyeyan, Priyanka  
Arul Mohan, Vinay

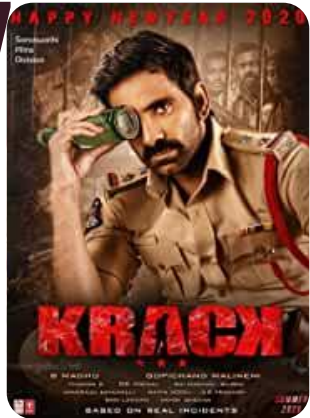
**DIRECTOR**  
Nelson Dilipkumar



**MOST ELIGIBLE BACHELOR**  
[TELUGU]

**CAST**  
Akhil Akkineni, Pooja Hegde

**DIRECTOR**  
Bommarillu Bhaskar



**KRACK**  
[TELUGU]

**CAST**  
Shruti Haasan, Ravi Teja,  
Varalaxmi Sarathkumar

**DIRECTOR**  
Gopichand Malineni



**RED**  
[TELUGU]

**CAST**  
Ram Pothineni, Malvika  
Sharma

**DIRECTOR**  
Kishore Tirumala



**VAKEELSAAB**  
[TELUGU]

**CAST**  
Prakash Raj,  
Nivetha Thomas,  
Pawan Kalyan

**DIRECTOR**  
Venu Sriram



# REGIONAL CONTENT PIPELINE



**RANGDE**  
[TELUGU]

**CAST**  
Nitin, Keerthi Suresh

**DIRECTOR**  
Venky Atluri



**KGF 2**  
[KANNADA]

**CAST**  
Sanjay Dutt,  
Yash,  
Srinidhi Shetty

**DIRECTOR**  
Prashanth Neel



**ROBERT**  
[KANNADA]

**CAST**  
Jagapathi Babu,  
Darshan Thoogudeep,  
Asha Bhat

**DIRECTOR**  
Tarun Sudhir



**KOTLI GOBBA 3**  
[KANNADA]

**CAST**  
Madonna Sebastian,, Kicha  
Sudeep, Shraddha Das

**DIRECTOR**  
Shiva Karthik



**YUVARATHNA**  
[KANNADA]

**CAST**  
Puneeth Rajkumar,  
Dhananjay,  
Sayyesha Saigal, Vashista N  
Simha

**DIRECTOR**  
Santhosh Anandram



**KAVAAL**  
[MALAYALAM]

**CAST**  
Suresh Gopi, Nithin Renji  
Panicker,  
Joby George

**DIRECTOR**  
Nithin Renji  
Panicker



**KURUP**  
[MALAYALAM]

**CAST**  
Dulquer Salman, Sunny Wayne,  
Indrajith Sukumaran

**DIRECTOR**  
Srinath  
Rajendran



**GOLGAPPE**  
[PUNJABI]

**CAST**  
Rajat Bedi,  
Binnu Dhillon,  
Ihana Dhillon

**DIRECTOR**  
Smeep Kang



# REGIONAL CONTENT PIPELINE



**QISMAT 2**  
[PUNJABI]

**CAST**  
Sargun Mehta, Tania, Ammy Virk

**DIRECTOR**  
Jagdeep Sidhu



**PUAADA**  
[PUNJABI]

**CAST**  
Sonam Bajwa, Ammy Virk

**DIRECTOR**  
Rupinder Chaha



**PANNI CH MADHAANI**  
[PUNJABI]

**CAST**  
Gippy Grewal, Neeru Bajwa

**DIRECTOR**  
Vijay Kumar Arora



**KOKKA**  
[PUNJABI]

**CAST**  
Neeru Bajwa, Gurnam Bhullar

**DIRECTOR**  
Ksshitij Chaudhary



**KAKABABUR  
PROTYORTON**  
[BENGALI]

**CAST**  
Prosenjit Chatterjee

**DIRECTOR**  
Srijit Mukherjee



**SWITZERLAND**  
[BENGALI]

**CAST**  
Abir Chatterjee, Rukmini Maitra

**DIRECTOR**  
Sauvik Kundu



**LOKKHI CHELE**  
[BENGALI]

**CAST**  
Ambarish Bhatta Charya, Churni Ganguly, Babul Supriyo

**DIRECTOR**  
Kaushik Ganguly



**SHOKUNER LOBH**  
[BENGALI]

**CAST**  
Parambrata Chatterjee, tuhina Das, Joy Sengupta

**DIRECTOR**  
Anindya Bikash Dutta



# Thank You



**For any queries please contact investor relations team:  
Email ID: [investorrelations@pvrcinemas.com](mailto:investorrelations@pvrcinemas.com)**