

GTPL Hathway Limited

CIN: L64204GJ2006PLC048908

Registered Office : 202, 2nd Floor, Shahjanand Shopping Centre,
Opp. Swaminarayan Temple, Shahibaug, Ahmedabad - 380 004, Gujarat.
Phone : 079-25626470



AN ISO 27001:2013 & ISO 9001: 2015
CERTIFIED COMPANY

Ref. No.: GTPL/SE/2023

January 12, 2023

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 the Standalone and Consolidated Unaudited Financial Results for the quarter and nine months ended December 31, 2022

Kindly find enclosed herewith a copy of Investor Presentation on the Standalone and Consolidated Unaudited Financial Results for the quarter and nine months ended December 31, 2022.

The same will also be available on the Company's website, 'www.gtpl.net'.

Thanking you.

Yours faithfully,
For GTPL Hathway Limited

Hardik Sanghvi
Company Secretary & Compliance Officer
FCS: 7247

Encl: As above

GTPL Hathway Limited

Q3 & 9M FY23 Results Update



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Company Overview & Strategy





- Brand Identity updated to highlight “**Entertain**” and “**Connect**”; effectively communicate the wider range of our offerings.
- Endeavour to provide a variety of options meeting all the Entertainment and Connectivity needs of our customers.

- GTPL Hathway is engaged in Digital Cable TV Distribution and High-speed Broadband Services for 16 years; connecting 11+ million households in 1,400+ towns across 22 states in India.
- The Company is the **No. 1** Multi-Service Operator (MSO) in India & Gujarat and the **No. 2** MSO in West Bengal.
- GTPL Broadband is the **No. 6** Private Wireline Broadband provider in India & the **No. 1** in Gujarat and providing high-speed fiber broadband at affordable rates to 8.95+ Lac connected Homes.



Digital Cable TV

- **No.1** MSO in India
- **Combined Offerings** of Digital Cable TV & OTT services
- 100% subscribers under Prepaid Model
- 50+ Owned & Operated Channels



Broadband

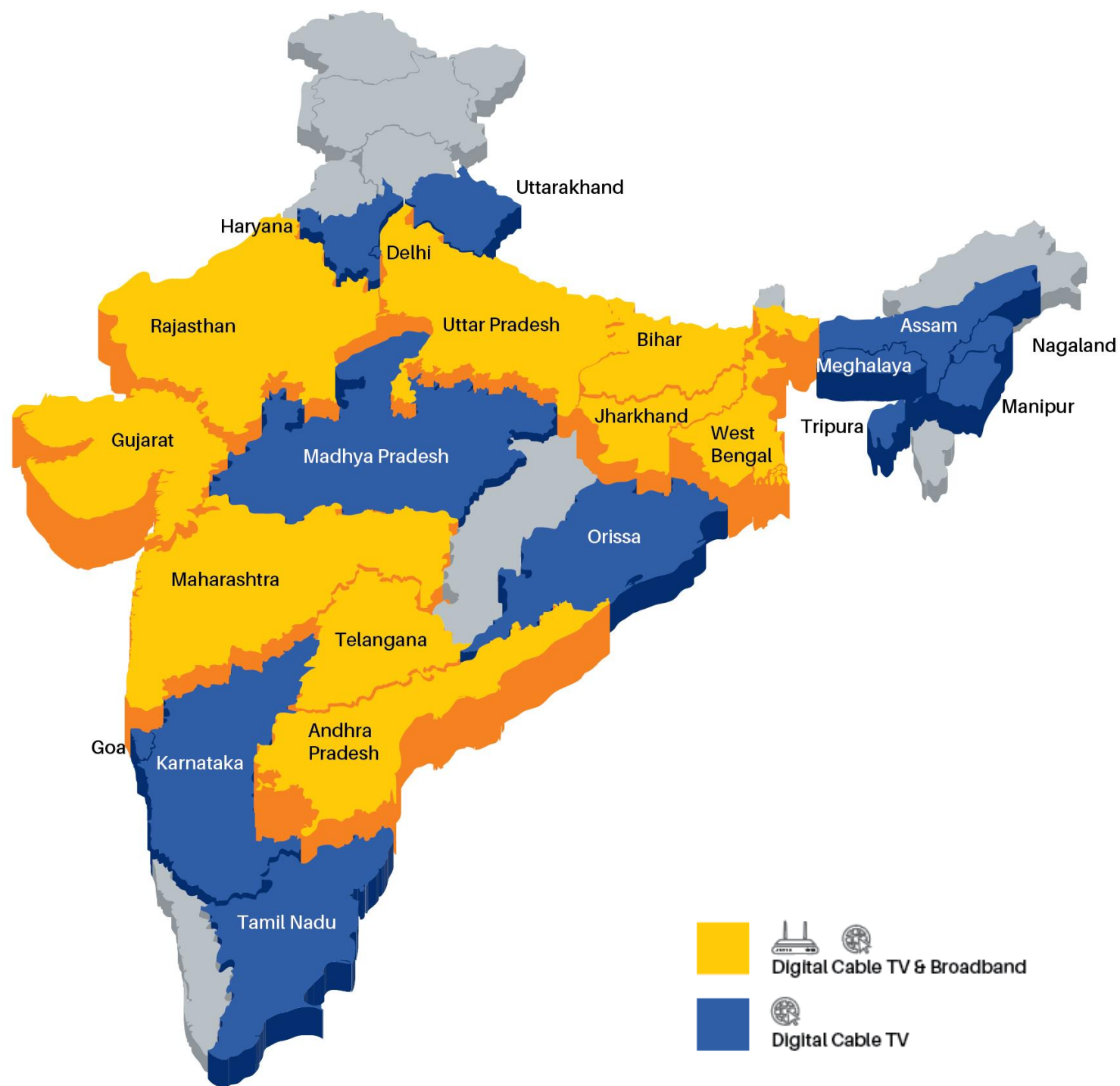
- **No. 6** Private Wireline Broadband player
- High Speed Broadband up to 200 Mbps
- Homepass of 5.15 Mn
- Uninterrupted connectivity through GPON Technology



Network & Infra

- 75,000 km+ of Optical fiber network
- BharatNet project (Phase-II, Gujarat) successfully delivered; connected 3,700 Gram Panchayat
- O&M contract - 17,000 km of Optical Fiber for BharatNet

Leader across Key Markets



01



Commenced Business in 2006

02



Footprint in 1,400+ towns across 22 States connecting 11+ Mn Households

03



#No.1* MSO in India
#No.1 MSO in Gujarat
#No.2 in West Bengal

04



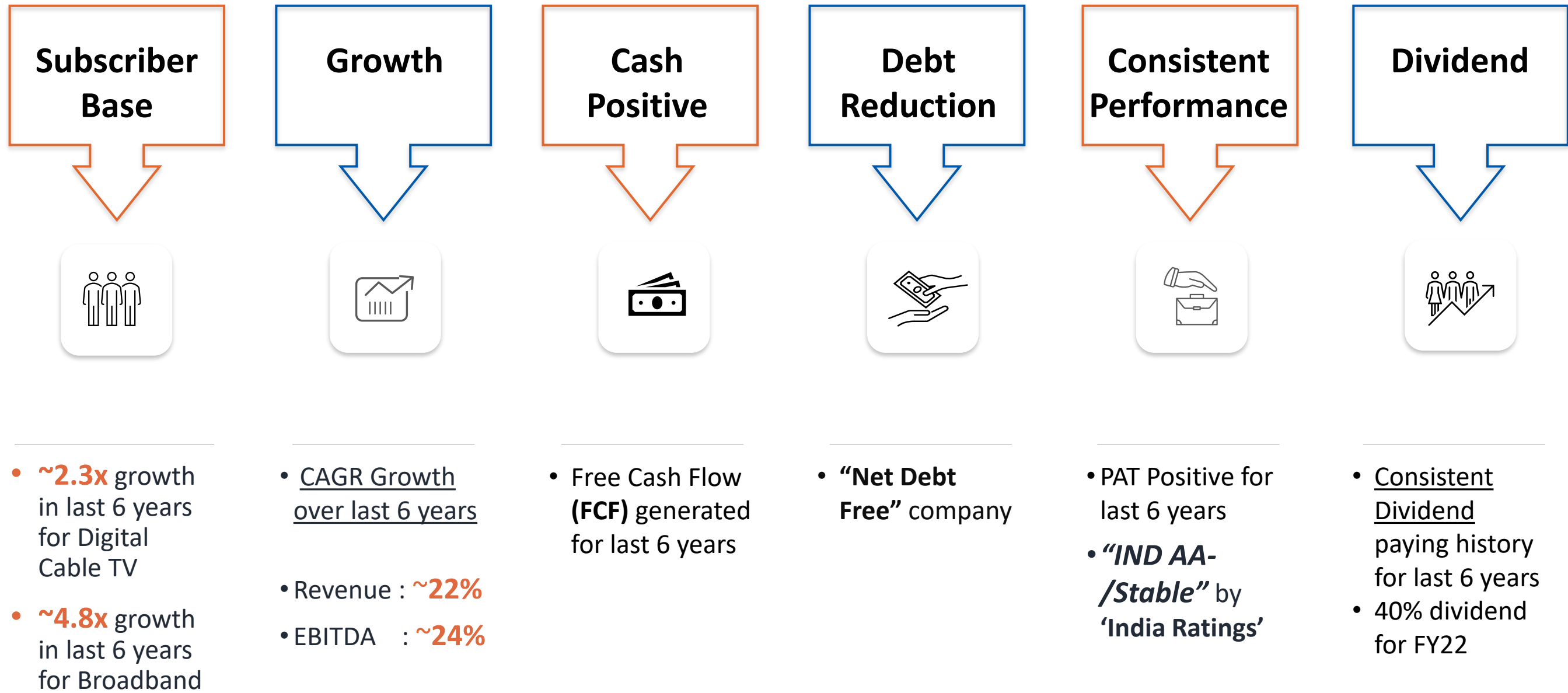
#No. 6* Private Wireline Broadband Player in India
#No. 1 in Gujarat**

05

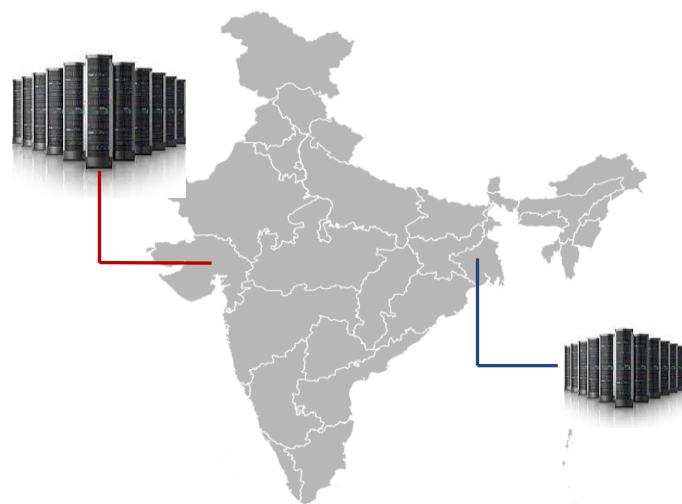


Significant presence in Maharashtra, Andhra Pradesh, Telangana, Tamil Nadu & North-East

Value Creation Over The Period Of Time

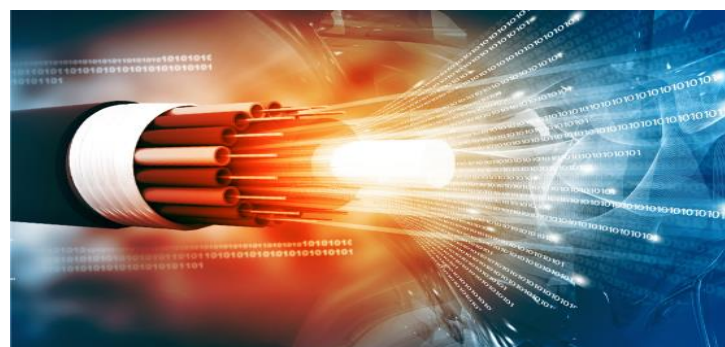


Advanced technology and equipment provided by leading technology vendors



Headend:

- Mother Headend & Network Operating Centre (NOC) in Ahmedabad, Gujarat
- 2nd Headend in Kolkata, West Bengal
- Distributing 875+ channels including 97+ HD channels across India



Optic Fiber Cable Network:

- Owned : 68,000+ KMs
- Underground : 7,500+ KMs
- Leased: 6,500+ KMs



GPON Technology:

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

Technology Partners


Headend  
Transforming Video Delivery

STBs & Modems  
 
 

SMS 

CAS  

DRIVING TRUST

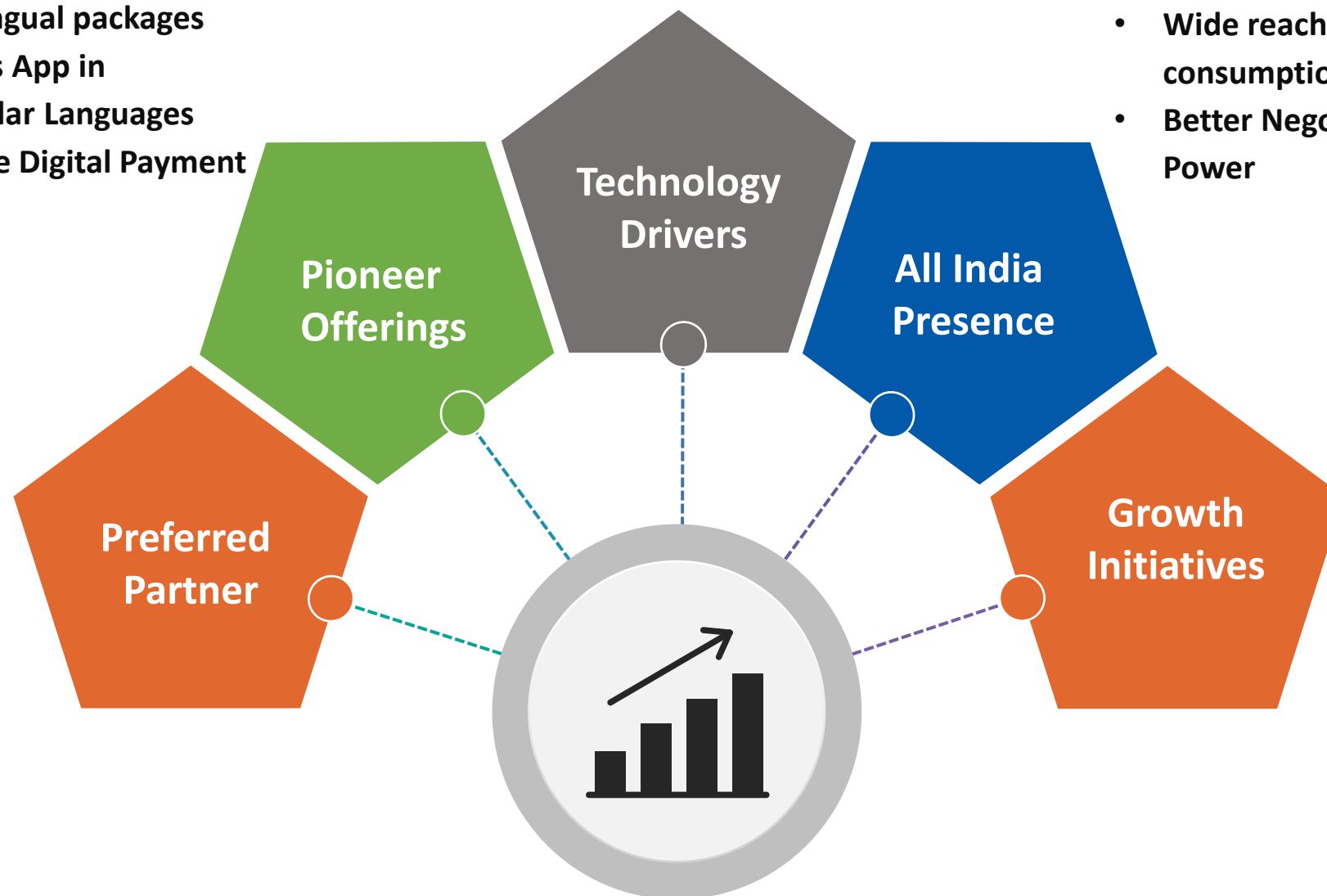
Database 

NOC & OSS  

- **GTPL Genie+ :**
Aggregation of OTT Apps For Digital Cable TV & Broadband customers
- **GTPL Genie :** *Bundle of Digital Cable TV + OTT*
- Multi-lingual packages
- Business App in Vernacular Languages
- New-Age Digital Payment Options

- Oracle's Exadata Database
- Nokia's BNG solution & Aprecomm's A.I. technology for Broadband
- Harmonic's MPEG4 Video Headend for Digital Cable TV + OTT

- Covering 22 states
- Wide reach across consumption market
- Better Negotiation Power

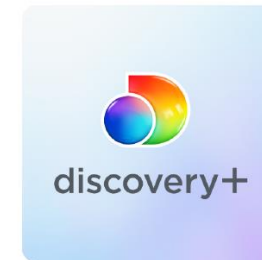


- 37,000+ Business Partners
- 200+ Broadcasters
- 1,700+ Enterprise Clientele
- 32+ Government Projects

- Continuously planning for expansion and penetration into new territories
- Strengthening presence in existing markets via different initiatives and product launches.

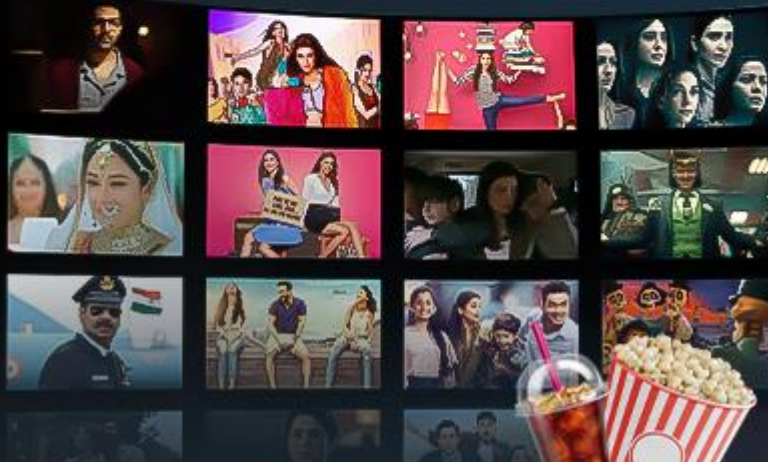



GTPL genie+



NON-STOP OTT PARTY.
ANYTIME. ANYWHERE

GTPL GENIE +
DEKHO PREMIUM OTT APPS





*T&C APPLY



**JAB CONNECTION HO DIL SE
TAB KYA DARNA BILL SE**

YOUR FAVOURITE OTT APPS WITH



*T&C APPLY



The Product

- An OTT Apps Aggregation
- Access to 15+ leading OTT Apps
- Available on a B2C basis
- To All GTPL active subscribers (Digital Cable TV & Broadband)

Advantage GTPL

- Offer all entertainment avenues to customers (Linear and Non-linear Content)
- Compete with DTH, ISPs and Telcos
- Direct Digital Payment to GTPL
- Effective retention tool

Advantage Customers

- *Unique 100% Guaranteed Cashback for all subscribers !*
- ~80% savings compared to MRP of OTT Apps
- Convenience of tenure options (1 Month, 3 Months, 6 Months & 12 Months)
- “Build your Bundle” option

Experienced Management Team with Strong Track Record

Anirudhsinh Jadeja
Promoter and MD

Zealous entrepreneur with 3 decades of leadership in cable operations; carving success story of GTPL since 2006. He has been awarded with numerous industry/social awards and has accomplished many firsts in the industry.

Anil Bothra
Chief Financial Officer

CA, CS and CMA with 27 years of experience with leading companies including Grasim, Atul Ltd, Shell Hazira LNG etc. Proficiency in managing Business Strategy, Corporate Finance, Budgeting, Internal Control and M&A.

Piyush Pankaj
Business Head - Cable TV &
Chief Strategy Officer

CFA and MBA with 24 years of varied experience in Media, Internet & e-commerce; has worked in Astro Group (Malaysia) and Zee Group (India). Track record of handling Strategy, Operations, Corporate Finance and Investor Relationships.

Neeraj Agrawal
Business Head - Broadband

MBA with 26 years of experience in managing diverse telecom products (both GSM & CDMA); has worked with industry leaders like Tata Tele and Reliance Communications.

Subrata Bhattacharya
Chief Information Officer

28 years of diverse experience in Cable TV and Broadband Technology Platforms across industry; previous experience with RPG Netcom, Siti Cable & Cable Comm. Strong focus on developing and implementing latest technology in the organization.

V Guruprasad
Chief Technology Officer

Over 31 years of core experience in Broadband and Cable Technology enterprises; has worked with global leaders like Reliance JIO, Silicon Applications(Singapore) and Scientific Atlanta.

Ekta Kanade
Chief Legal Officer

20 years of specialized expertise and experience largely in Media industry including Viacom 18, Walt Disney, etc.

Amit Shethia
Chief CSD Officer

29 years of experience in Sales & Customer Service Delivery domains mainly at Telco giants like Bharti Airtel, Idea Cellular and Reliance Communication.

Ashish Srivastava
Chief People Officer

28 years experience in leading HR operations across reputed organizations like M & B Engineering Ltd, Larsen & Toubro, Vodafone Idea Ltd, and Gujarat Ambuja Cements Ltd.

Cable TV Business Performance



8.90 Mn

Active STBs¹



8.30 Mn

Paying Subscribers



37k+

Business Partners



80%+

Digital Collection



100%

Base in prepaid business



Launch

GTPL Genie+

- Increased Active Subscribers by 700K Y-o-Y;
500K in 9M FY23

- Increased Paying Subscribers by 800K Y-o-Y;
500K in 9M FY23

- Entered 3 new states – Delhi, Haryana and
Uttarakhand

- Expanding aggressively in Andhra Pradesh,
Maharashtra, Telangana, Tamil Nadu and North-East

- 50+ Owned & Operated Channels



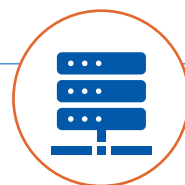
895K

Active Subscribers



5.15 Mn

Home-pass



310 GB

Average Data
consumption per month



18%

Y-o-Y Revenue Growth



200 Mbps

Speed with unlimited data



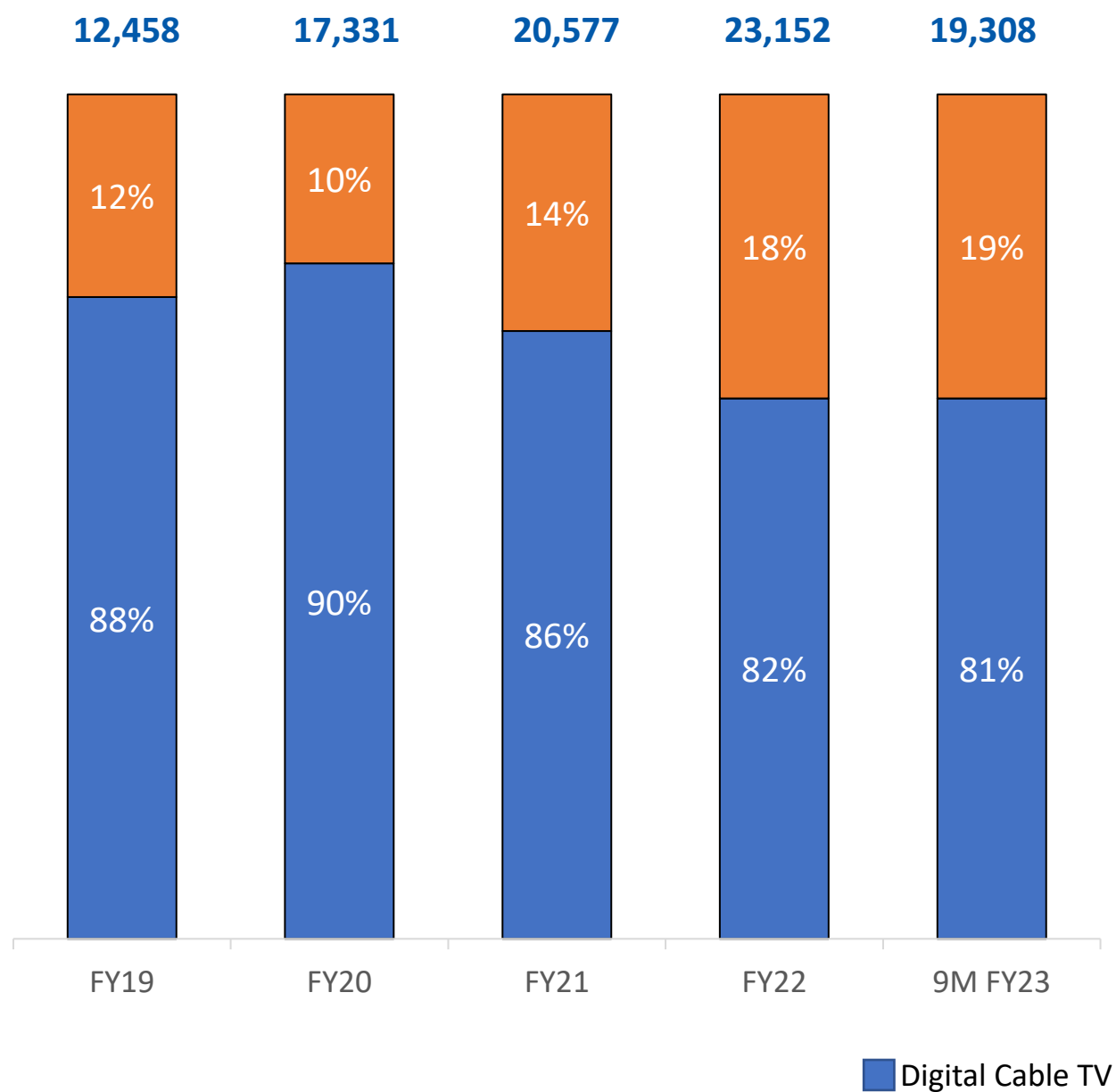
₹ 455/-

ARPU

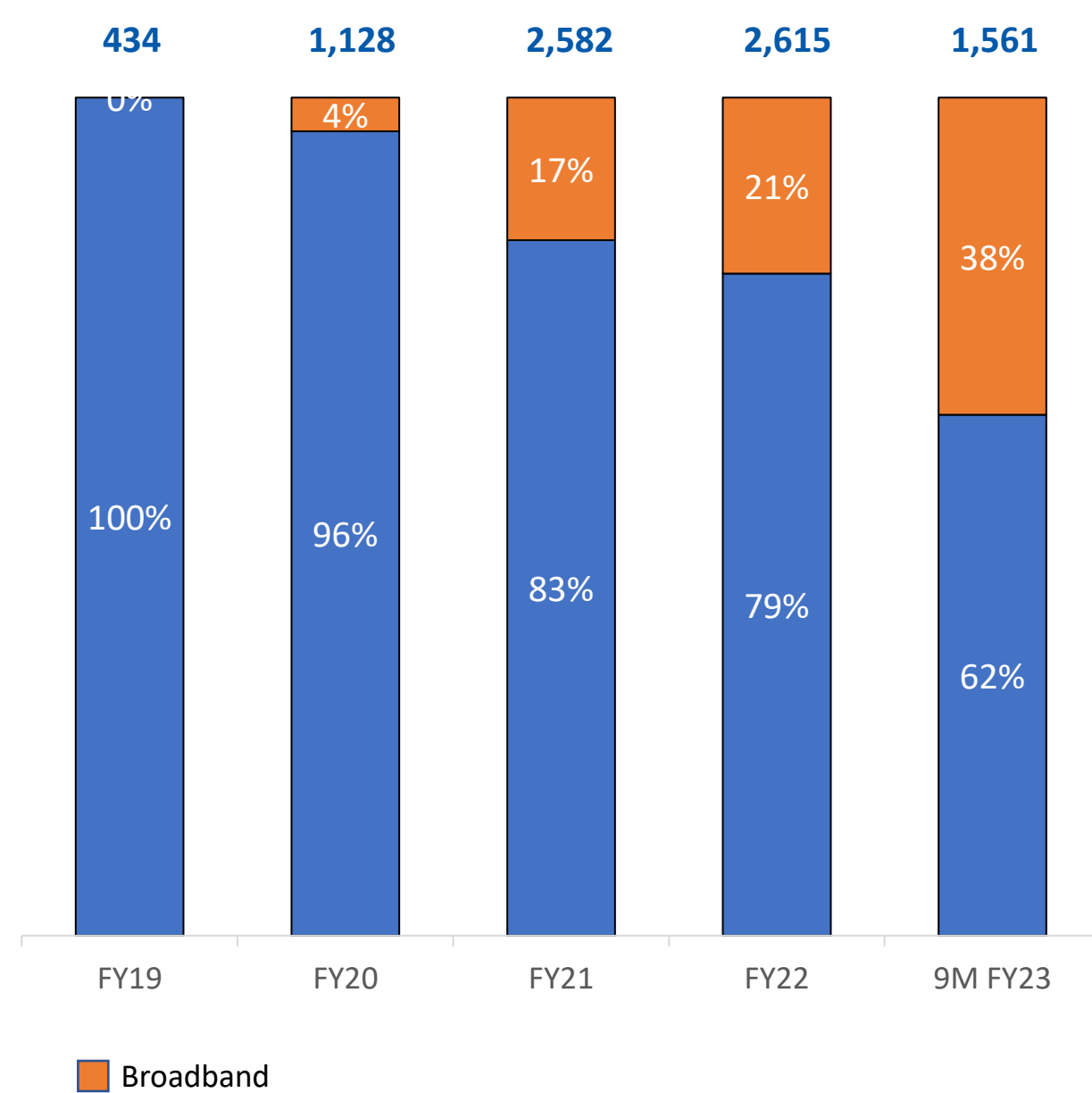
- Increase of 130K (17%) Subscribers Y-o-Y;
25K Subscribers Q-o-Q
- ARPU of ₹ 455 as of Dec-22; increase of ₹ 10 Y-o-Y
- Enhanced High Speed Broadband Service offering up to **200 Mbps** coupled with Truly Unlimited Data
- 5.15 Mn Home Pass; ~75% Home-pass available for FTTX conversion
- Average Data Consumption per Customer stands at 310 GB / Month for Q3 FY23; up by 28% Y-o-Y

Diversifying Business

Segmental Revenue from Operations



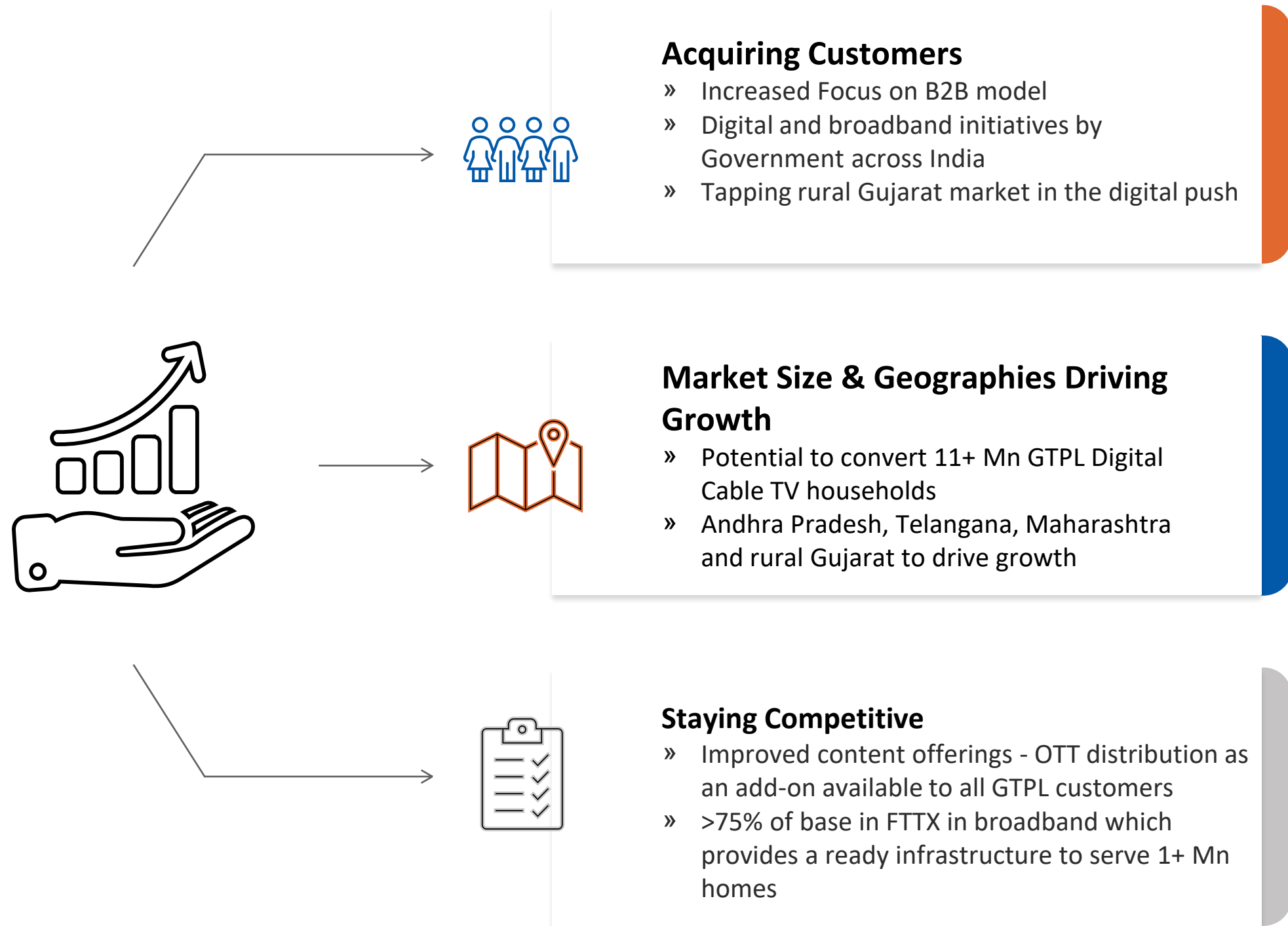
Segmental PBT



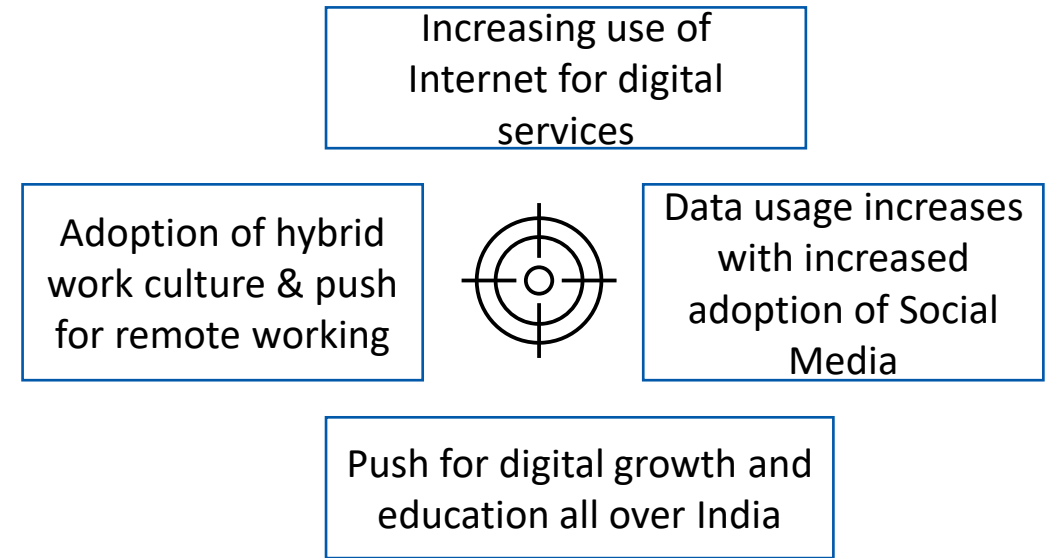
* FY = Apr-Mar, Q1 = Apr-Jun, Q2 = Jul-Sep, Q3 = Oct-Dec, Q4 = Jan-Mar, 9M = Apr-Dec

Note : Numbers are excluding EPC

Multiple Growth Levers for Broadband Business




Factors contributing to growth in Data consumption




Television continues to be preferred

 **TV still holding its ground against Digital**

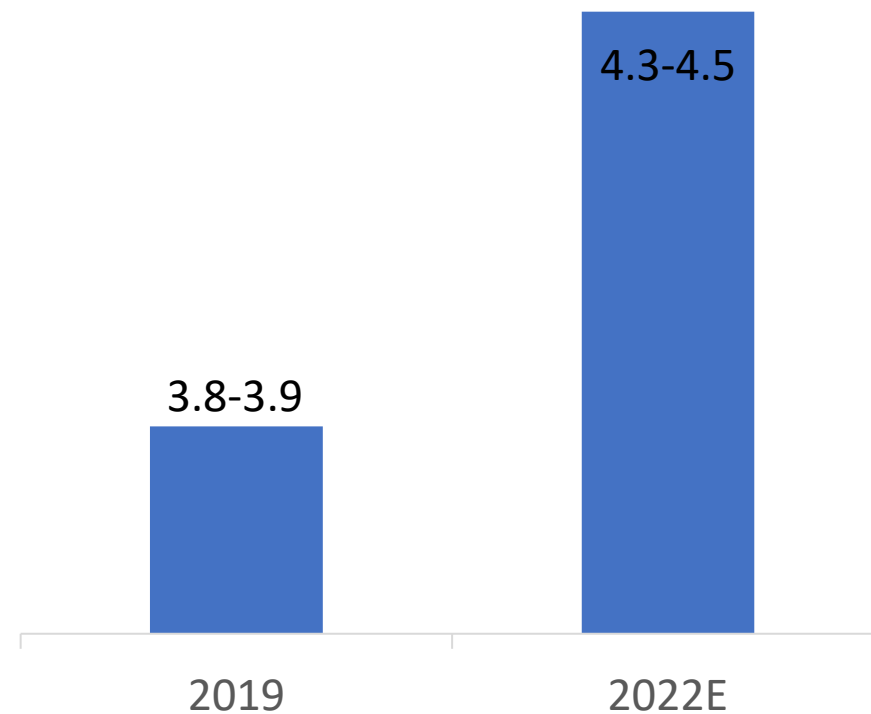
+2-4%

 **YoY increase in total households**
(Total 205 Mn in 2022)

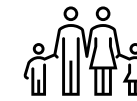
+10%

 **Total TV ad volume growth from 2020 to 2022**

 **No. of hours of consumption/day**



Note: TV ages 18+ who use at least once per month; includes live, DVR, and other prerecorded video (such as video downloaded from the internet but saved locally); includes all time spent watching TV, regardless of multitasking. If all population with age 18+ is considered, average hours per day is 3.28 hours as of 2022



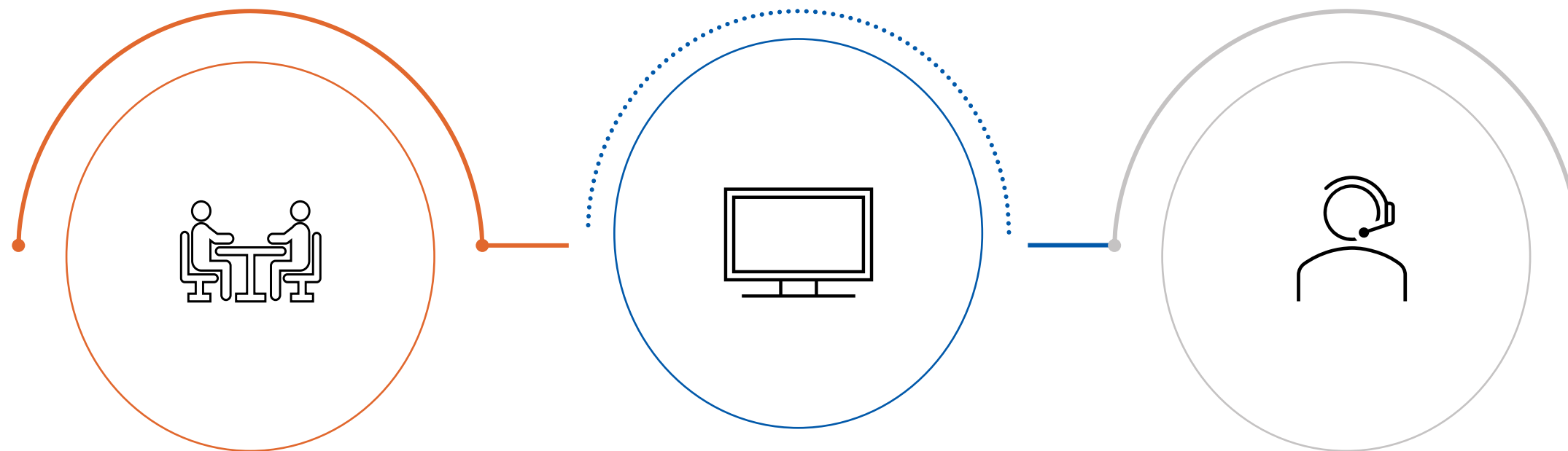
Co-viewership

TV continues to be a family viewing platform with 82% consumers reporting co-viewing with 3.5 average number of co-viewers per household in 2022



Preferred destination for Sporting events

In India and globally, TV viewership of the FIFA World Cup 2022 has shown a healthy trend, corroborating the thesis that TV continues to be a preferred platform to watch live sports.



Inorganic acquisitions

- ~45 Mn Cable TV Households catered by unorganized and small MSOs
- Potential to add and consolidate small players

Content Availability

- Distribution of Content (Broadcasting & OTT) to be available through GTPL
- Availability of local content through platform channels in multiple languages.

User friendly services

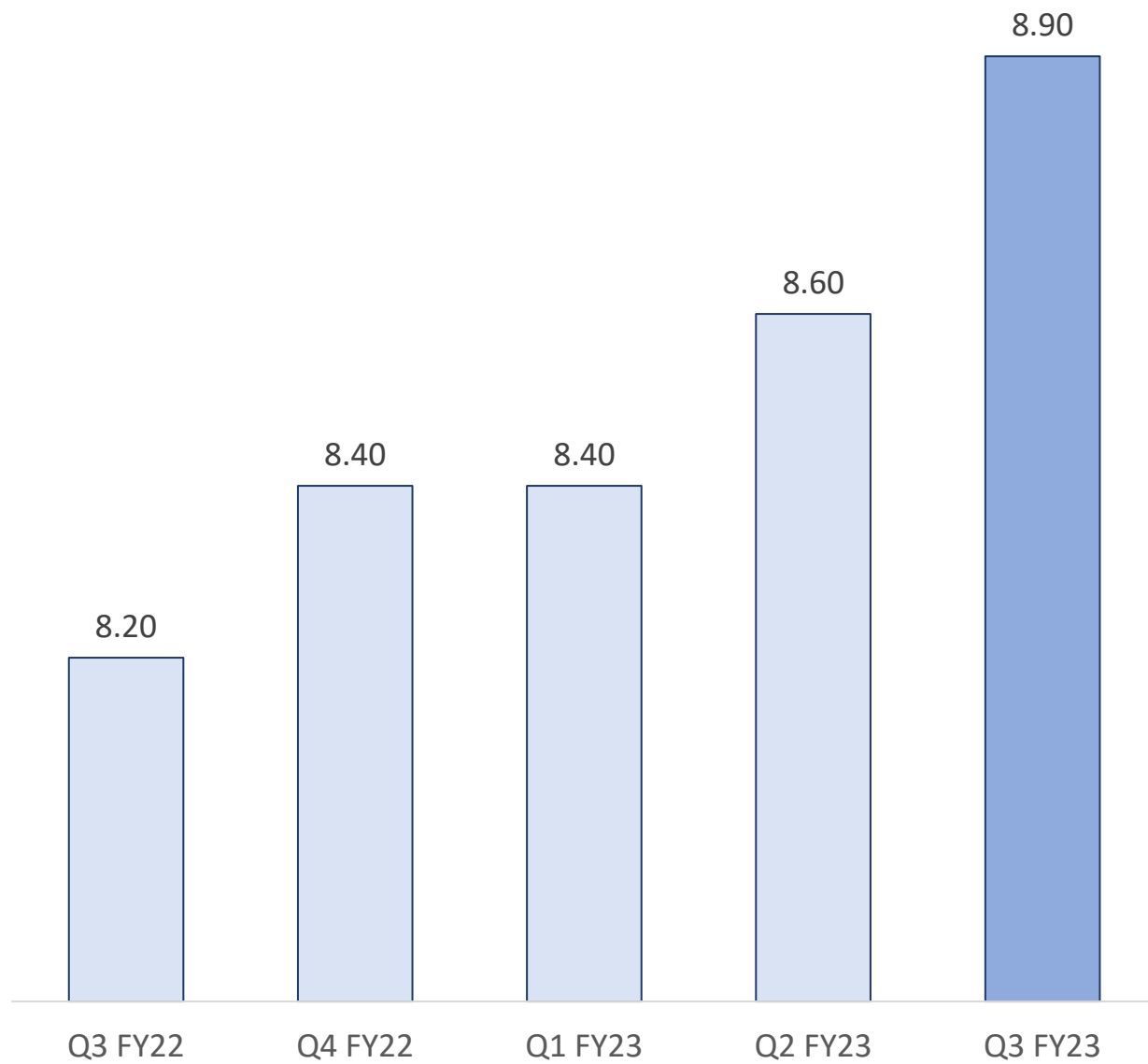
- Online payment mode available for instant activation of services.
- Availability of additional touch points for customer interaction including WhatsApp, Social Media, Website and App.



Key Performance Indicators

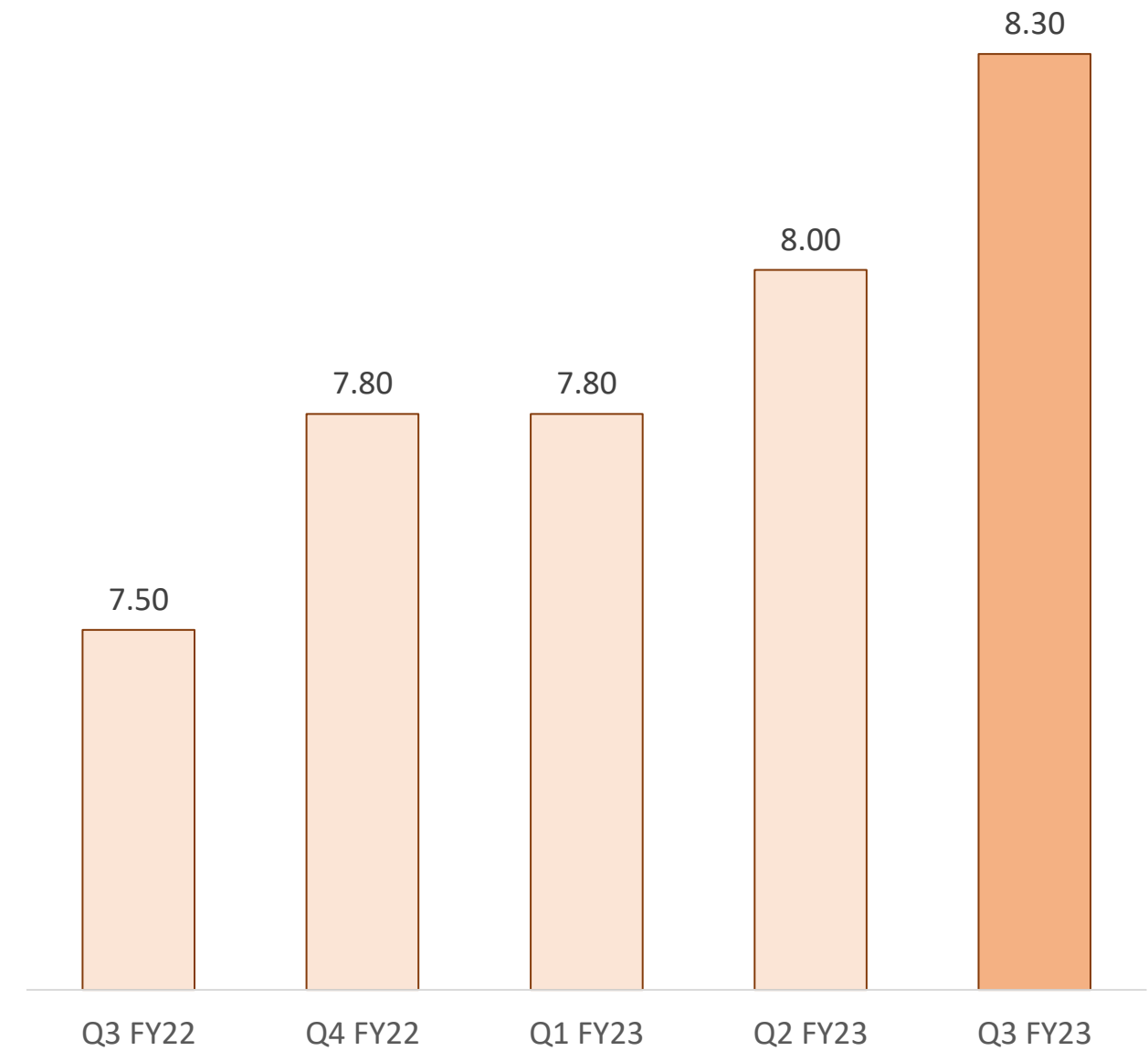


Active¹ Subscribers (Mn)



Active Subscribers increased 700K Y-o-Y

Paying Subscribers (Mn)



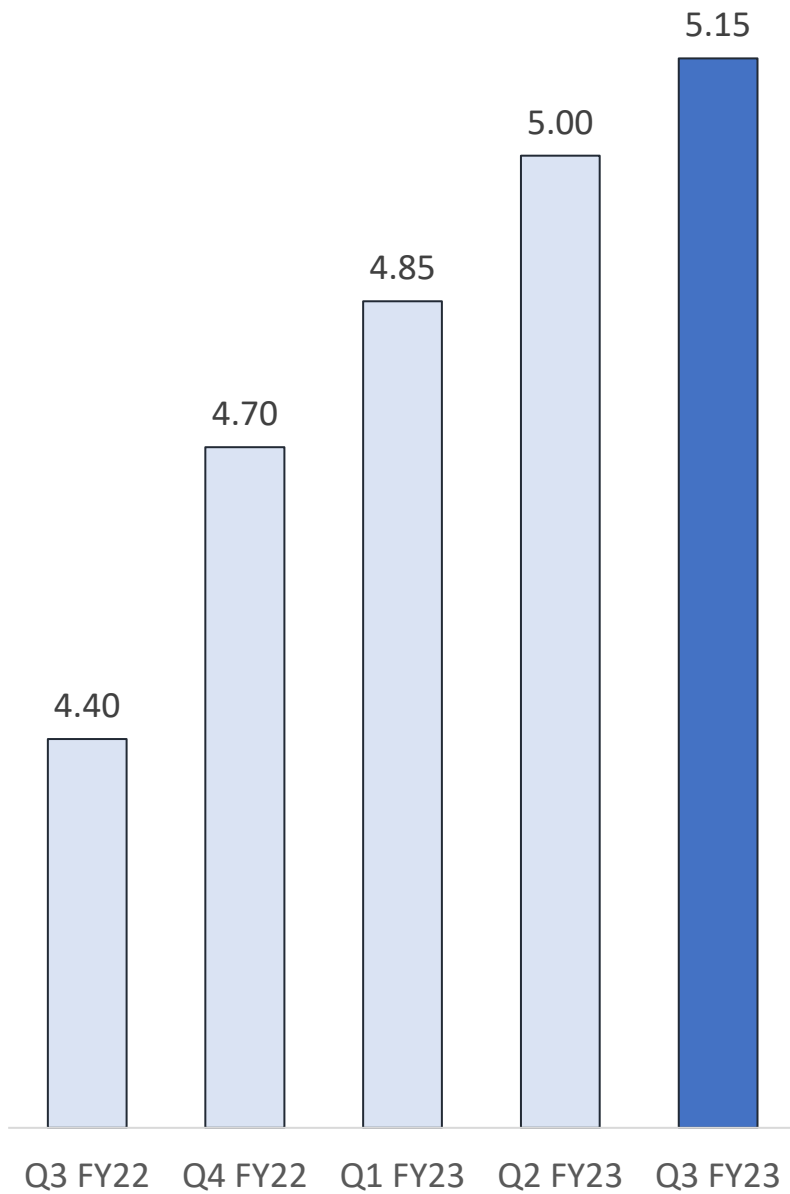
#Paying Subscribers increased 800K Y-o-Y

* FY = Apr-Mar, Q1 = Apr-Jun, Q2 = Jul-Sep, Q3 = Oct-Dec, Q4 = Jan-Mar

¹Active = Active during last 60 days

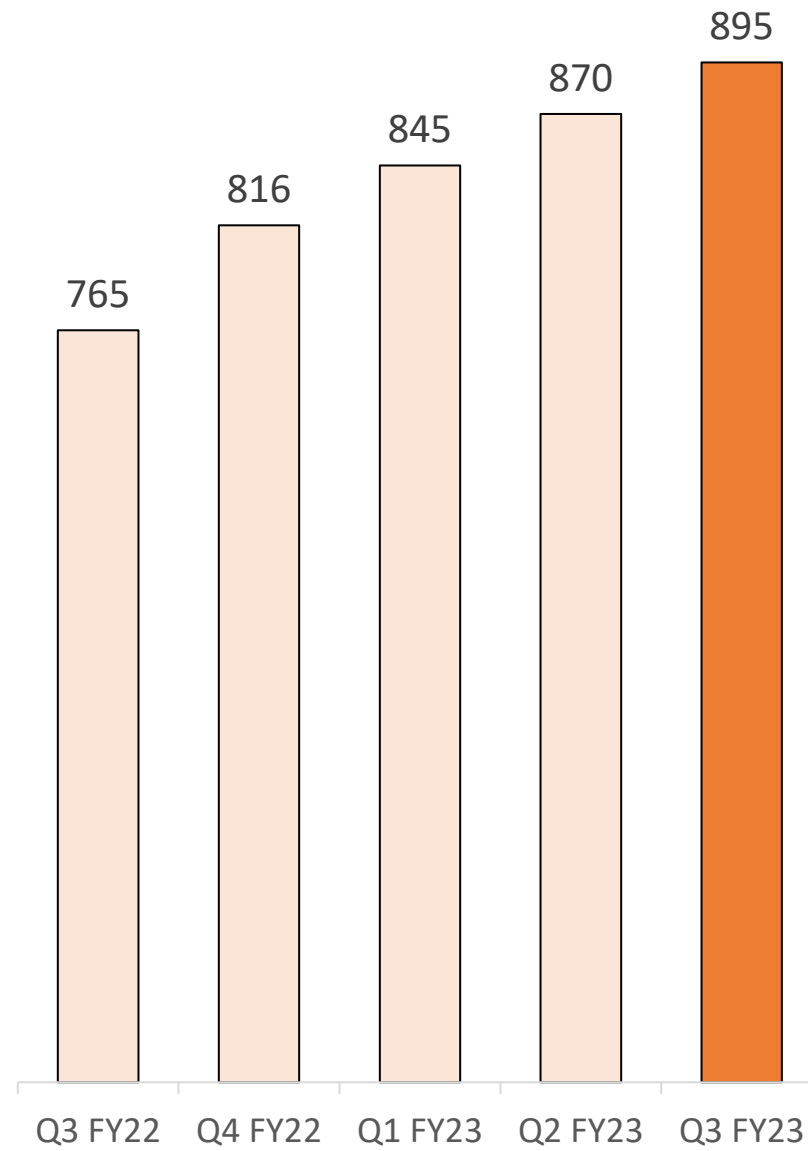
Broadband Business*

Homepass (Mn)



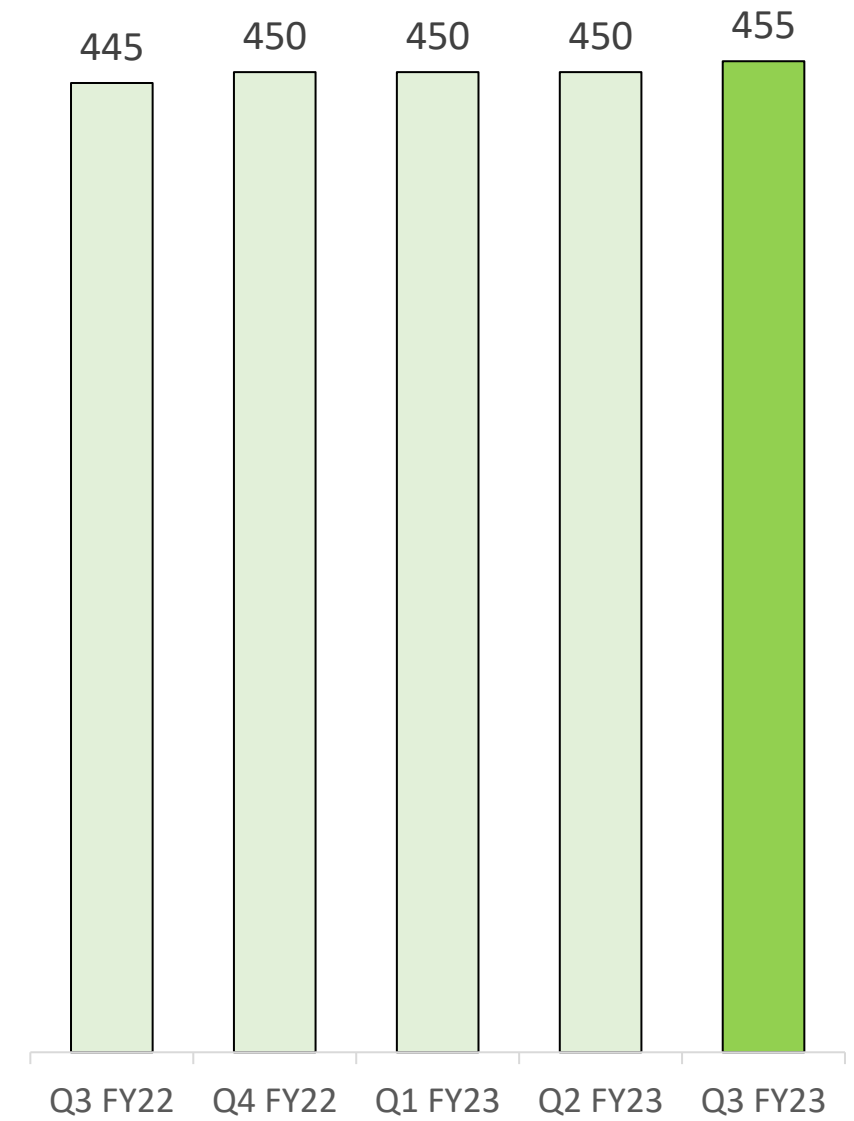
Homepass increased 750K Y-o-Y

Active Subscriber's ('000)



ACB increased 130K Y-o-Y

ARPU (₹) (Net of Taxes)



ARPU increased ₹ 10 Y-o-Y

* FY = Apr-Mar, Q1 = Apr-Jun, Q2 = Jul-Sep, Q3 = Oct-Dec, Q4 = Jan-Mar



Consolidated Financials



Financial Highlights : Consolidated

1 Revenue

Total Revenue up by 15% Y-o-Y
Subscription Revenue up by 3% Y-o-Y
ISP Revenue up by 18% Y-o-Y

2 EBITDA

EBITDA of ₹ 1,314 Mn in Q3 FY23; ₹ 4,051 Mn in 9M FY23
EBITDA Margin stands at 20.1% in 9M FY23

3 Finance Cost

Finance Cost down by 54% Y-o-Y

4 PAT

PAT of ₹ 376 Mn in Q3 FY23; ₹ 1,268 Mn in 9M FY23

Profit & Loss Statement: Consolidated * : 9M-o-9M

Particulars	9M FY23	9M FY22 Ex. EPC	9M FY22 EPC Contract	9M FY22 Total	9M-o-9M% (Ex. EPC)
Revenue					
Subscription CATV	8,253	8,057	-	8,057	2%
Revenue from EPC contract	-	-	343	343	0%
Broadband ISP	3,580	2,978	-	2,978	20%
Placement / Carriage / Marketing Incentive	6,900	5,529	-	5,529	25%
Activation	275	444	-	444	-38%
Other Operating Income	708	618	-	618	15%
Other Income	408	319	1	320	28%
Total Income	20,123	17,945	344	18,288	12%
Expenditure					
Pay Channel Cost	10,380	9,001	-	9,001	15%
EPC cost of material consumed & sub contracting cost	-	-	320	320	0%
Employee Cost	1,067	881	-	881	21%
Other Operating, Admin & Selling Exp.	4,626	3,786	-	3,786	22%
Total Expenditure	16,072	13,668	320	13,988	18%
EBITDA	4,051	4,277	24	4,301	-5%
EBITDA %	20.1%	23.8%	6.9%	23.5%	
Depreciation/Amortization	2,193	1,875	0	1,875	17%
Finance cost	71	102	-	102	-30%
Profit before Tax & Exceptional item	1,787	2,299	24	2,323	-22%
Exceptional item / Share of Profit/(Loss) from Associate and JVs	17	(130)	-	(130)	
PBT	1,805	2,170	24	2,194	-17%
Tax	449			573	
PAT before Other Comprehensive Income	1,355			1,621	-16%
(Add)/Less : Share of Non Controlling Interest	(98)			(169)	
Add/(Less) Other Comprehensive Income	11			2	
PAT	1,268			1,454	-13%

* FY = Apr-Mar, Q1 = Apr-Jun, Q2 = Jul-Sep, Q3 = Oct-Dec, Q4 = Jan-Mar, 9M = Apr-Dec

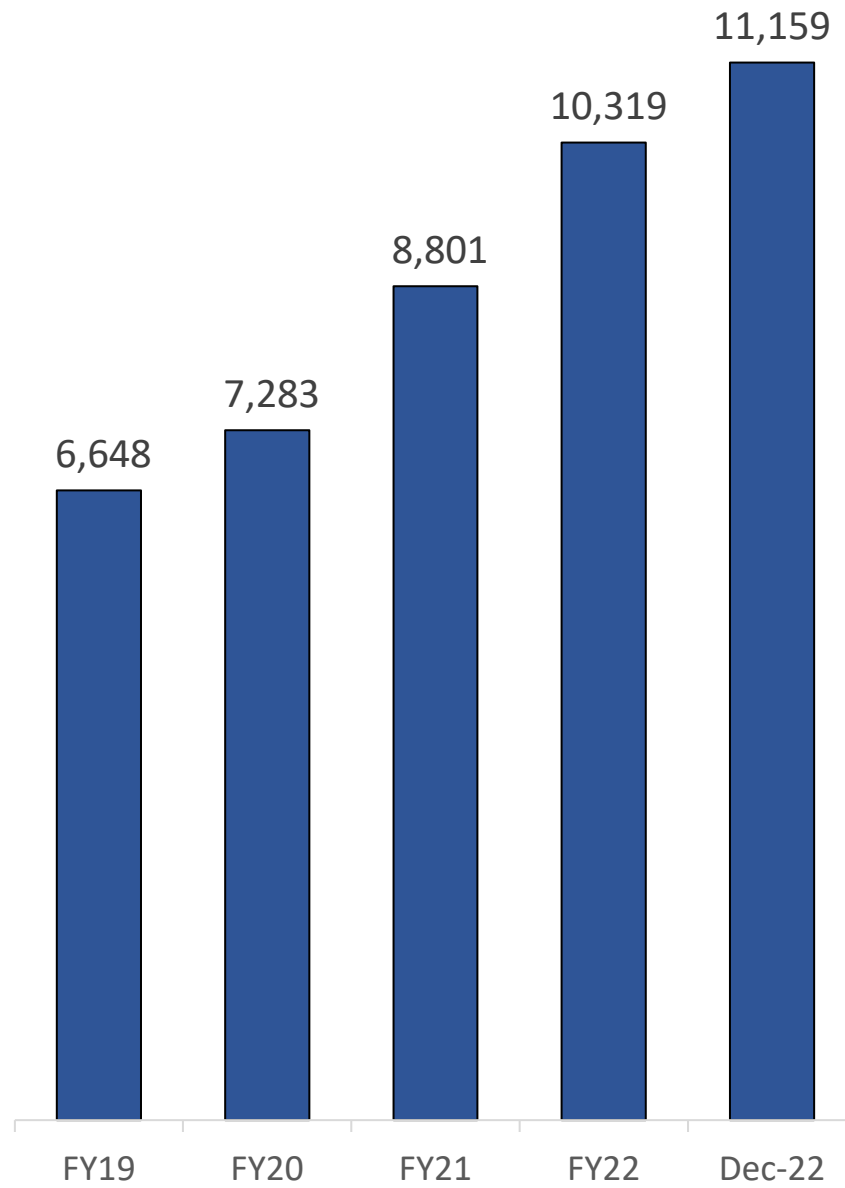
Profit & Loss Statement: Consolidated * : Q-o-Q

Particulars	Q3 FY23	Q2 FY23	Q-o-Q% (Ex. EPC)	Q3 FY22 Ex. EPC	Q3 FY22 EPC Contract	Q3 FY22 Total	Y-o-Y% (Ex. EPC)	FY22 Ex. EPC	FY22 EPC Contract	FY22 Total
Revenue										
Subscription CATV	2,775	2,751	1%	2,702	-	2,702	3%	10,753	-	10,753
Revenue from EPC contract	-	-	-	-	19	19	-	-	412	412
Broadband ISP	1,243	1,198	4%	1,054	-	1,054	18%	4,075	-	4,075
Placement / Carriage / Marketing Incentive	2,539	2,247	13%	1,859	-	1,859	37%	7,546	-	7,546
Activation	78	100	-22%	132	-	132	-41%	584	-	584
Other Operating Income	221	255	-13%	225	-	225	-2%	771	-	771
Other Income	193	70	177%	138	0	138	40%	424	1	425
Total Income	7,050	6,620	6%	6,110	19	6,130	15%	24,154	413	24,567
Expenditure										
Pay Channel Cost	3,709	3,391	9%	3,020	-	3,020	23%	12,137	-	12,137
EPC cost of material consumed & sub contracting cost	-	-	-	-	18	18	-	-	389	389
Employee Cost	379	360	5%	305	-	305	24%	1,207	-	1,207
Other Operating, Admin & Selling Exp.	1,647	1,485	11%	1,313	-	1,313	25%	5,133	-	5,133
Total Expenditure	5,735	5,237	10%	4,639	18	4,657	24%	18,477	389	18,866
EBITDA	1,314	1,383	-5%	1,472	1	1,473	-11%	5,677	24	5,701
EBITDA %	18.6%	20.9%		24.1%	7.6%	24.0%		23.5%	5.8%	23.2%
Depreciation/Amortization	758	743	2%	636	0	636	19%	2,529	0	2,529
Finance cost	25	23	8%	53	-	53	-54%	144	-	144
Profit before Tax & Exceptional item	532	617	-14%	782	1	784	-32%	3,004	24	3,028
Exceptional item / Share of Profit/(Loss) from Associate and JVs	8	9		(2)	-	(2)		(129)	-	(129)
PBT	539	626	-14%	780	1	782	-31%	2,875	24	2,899
Tax	141	151				195				712
PAT before Other Comprehensive Income	398	475	-16%			586	-32%			2,187
(Add)/Less : Share of Non Controlling Interest	(23)	(26)				(40)				(190)
Add/(Less) Other Comprehensive Income	1	10				(0)				9
PAT	376	459	-18%			546	-31%			2,006

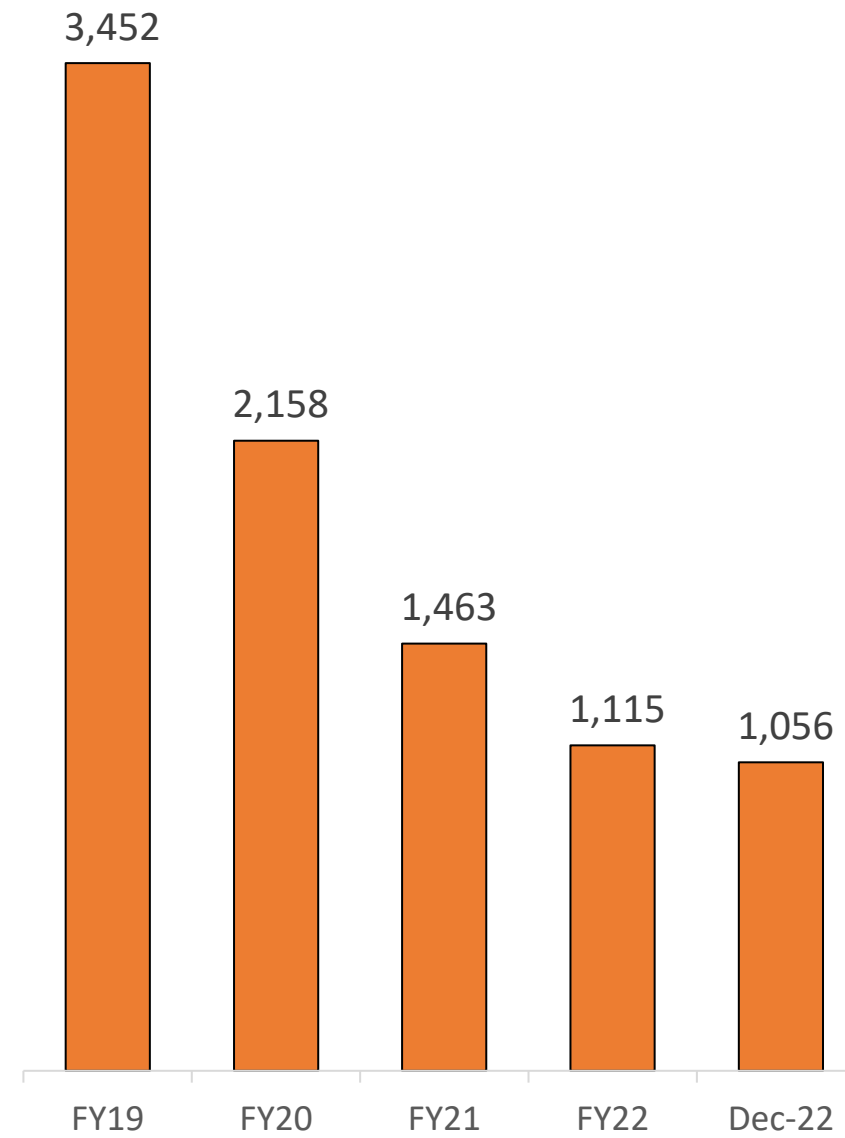
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Financial Performance Trend: Consolidated*

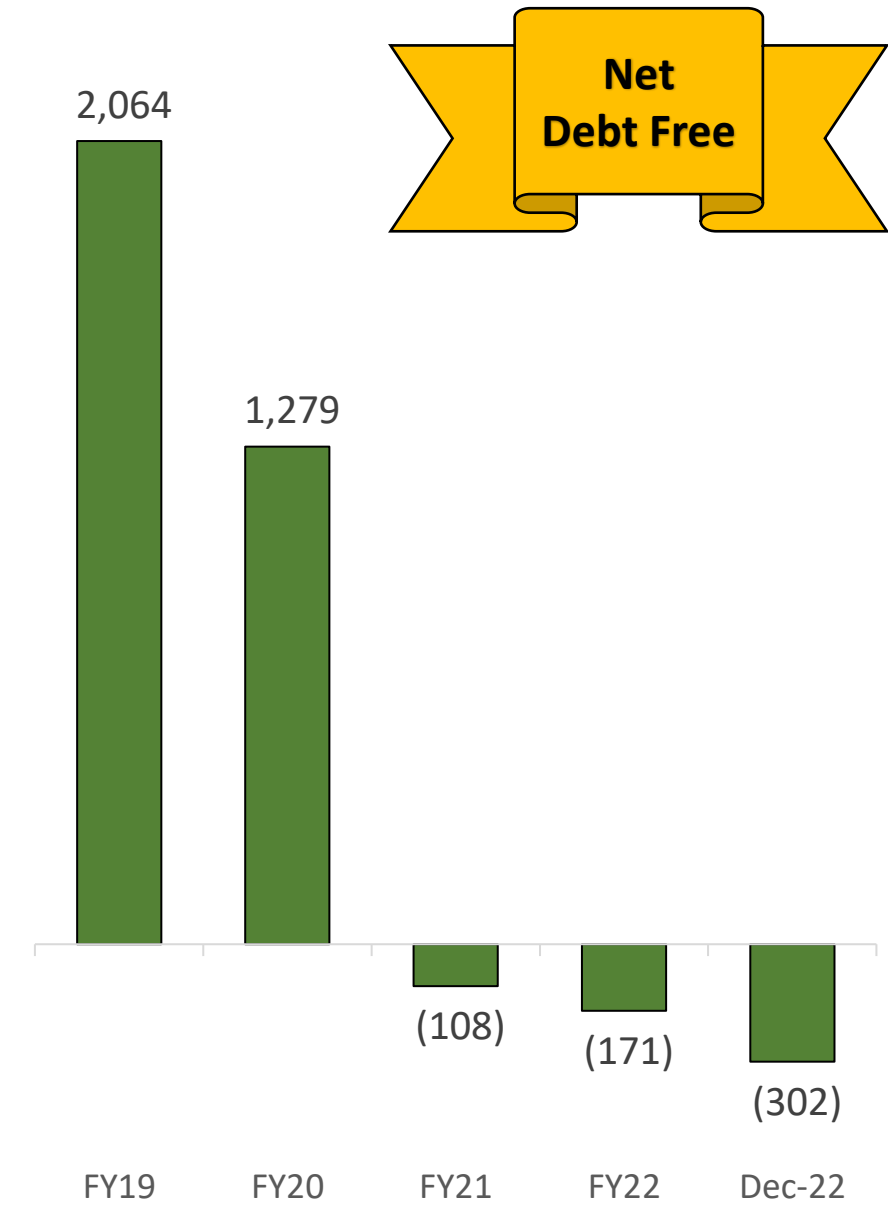
Net Worth



Gross Debt



Net Debt



* FY = Apr-Mar



Standalone Financials





1 Revenue

Total Revenue up by 16% Y-o-Y
Subscription Revenue up by 4% Y-o-Y

2 EBITDA

EBITDA of ₹ 712 Mn in Q3 FY23; ₹ 2,242 Mn in 9M FY23
EBITDA Margin stands at 17.5% in 9M FY23

3 Finance Cost

Finance Cost down by 49% Y-o-Y

4 PAT

PAT of ₹ 210 Mn in Q3 FY23; ₹ 760 Mn in 9M FY23

Profit & Loss Statement : Standalone* : 9M-o-9M

Particulars	9M FY23	9M FY22 Ex. EPC	9M FY22 EPC Contract	9M FY22 Total	9M-o-9M% (Ex. EPC)
Revenue					
Subscription CATV	5,790	5,601	-	5,601	3%
Revenue from EPC contract	-	-	343	343	-
Placement / Carriage / Marketing Incentive	5,607	4,415	-	4,415	27%
Activation	171	252	-	252	-32%
Other Operating Income	913	822	-	822	11%
Other Income	313	269	1	270	16%
Total Income	12,795	11,358	344	11,702	13%
Expenditure					
Pay Channel Cost	7,608	6,440	-	6,440	18%
EPC cost of material consumed & sub contracting cost	-	-	320	320	-
Employee Cost	522	438	-	438	19%
Other Operating, Admin & Selling Exp.	2,423	2,055	-	2,055	18%
Total Expenditure	10,553	8,933	320	9,253	18%
EBITDA	2,242	2,425	24	2,449	-8%
EBITDA %	17.5%	21.3%	6.9%	20.9%	
Depreciation/Amortization	1,188	1,022	0	1,022	16%
Finance cost	55	89	-	89	-38%
Profit before Tax & Exceptional item	999	1,314	24	1,338	-24%
Exceptional item / Share of Profit/(Loss) from Associate and JVs	-	-	-	-	
PBT	999	1,314	24	1,338	-24%
Tax	250			348	
PAT before Other Comprehensive Income	749			990	-24%
Add/(Less) Other Comprehensive Income	11			1	
PAT	760			991	-23%

* FY = Apr-Mar, Q1 = Apr-Jun, Q2 = Jul-Sep, Q3 = Oct-Dec, Q4 = Jan-Mar, 9M = Apr-Dec

Profit & Loss Statement : Standalone * : Q-o-Q

Particulars	Q3 FY23	Q2 FY23	Q-o-Q% (Ex. EPC)	Q3 FY22 Ex. EPC	Q3 FY22 EPC Contract	Q3 FY22 Total	Y-o-Y% (Ex. EPC)	FY22 Ex. EPC	FY22 EPC Contract	FY22 Total
Revenue										
Subscription CATV	1,952	1,936	1%	1,878	-	1,878	4%	7,488	-	7,488
Revenue from EPC contract	-	-	-	-	19	19	-	-	412	412
Placement / Carriage / Marketing Incentive	2,063	1,830	13%	1,488	-	1,488	39%	6,040	-	6,040
Activation	50	65	-24%	82	-	82	-40%	324	-	324
Other Operating Income	292	323	-10%	303	-	303	-4%	1,049	-	1,049
Other Income	140	64	119%	110	0	111	27%	364	1	364
Total Income	4,497	4,218	7%	3,861	19	3,881	16%	15,264	413	15,677
Expenditure										
Pay Channel Cost	2,730	2,481	10%	2,145	-	2,145	27%	8,693	-	8,693
EPC cost of material consumed & sub contracting cost	-	-	-	-	18	18	-	-	389	389
Employee Cost	186	176	6%	149	-	149	24%	593	-	593
Other Operating, Admin & Selling Exp.	869	785	11%	715	-	715	22%	2,710	-	2,710
Total Expenditure	3,785	3,441	10%	3,009	18	3,027	26%	11,996	389	12,385
EBITDA	712	777	-8%	852	1	854	-16%	3,268	24	3,292
EBITDA %	15.8%	18.4%		22.1%	7.6%	22.0%		21.4%	5.8%	21.0%
Depreciation/Amortization	404	411	-2%	343	0	343	18%	1,382	0	1,382
Finance cost	21	16	36%	41	-	41	-49%	104	-	104
Profit before Tax & Exceptional item	287	351	-18%	468	1	469	-39%	1,782		1,805
Exceptional item / Share of Profit/(Loss) from Associate and JVs		-		-		-				-
PBT	287	351	-18%	468	1	469	-39%	1,782		1,805
Tax	78	85				116				433
PAT before Other Comprehensive Income	209	266	-21%			354	-41%			1,372
Add/(Less) Other Comprehensive Income	1	10				-				8
PAT	210	276	-24%			354	-41%			1,380

* FY = Apr-Mar, Q1 = Apr-Jun, Q2 = Jul-Sep, Q3 = Oct-Dec, Q4 = Jan-Mar

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EMKAY GLOBAL FINANCIAL SERVICES LTD.

is pleased to invite you for a conference call to discuss the **Q3FY23** results with

Mr. Anirudhsinh Jadeja – Promoter & Managing Director

Mr. Piyush Pankaj – Business Head – CATV & Chief Strategy Officer

Mr. Anil Bothra – Chief Financial Officer



GTPL Hathway Limited

On Friday, January 13, 2023 at 4:00 PM (IST)

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For further information please contact:



Mr. Pulkit Chawla
pulkit.chawla@emkayglobal.com
Tel.: +91 22 6624 2458

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Mr. Piyush Pankaj

Business Head - Cable TV &
Chief Strategy Officer



+91 98113 21102



piyush.pankaj@gtpl.net



Mr. Bhavin Soni
Mr. Irfan Raeen



+91 98335 37225

+91 97737 78669



bhavin.soni@linkintime.co.in
irfan.raeen@linkintime.co.in

