Ref. No.: GTPL/SE/2025

October 14, 2025

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

Scrip Code: **540602**

National Stock Exchange of India Limited
Exchange Plaza,
Plot No. C/1, G Block,
Bandra Kurla Complex, Bandra (East),
Mumbai – 400 051

Trading Symbol: **GTPL**

Dear Sir/Madam,

Sub: Investor Presentation on the Standalone and Consolidated Unaudited Financial Results for the quarter and half year ended September 30, 2025.

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find enclosed herewith a copy of Investor Presentation on the Standalone and Consolidated Unaudited Financial Results for the quarter and half year ended September 30, 2025.

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

Thanking you,

Yours faithfully,
For GTPL Hathway Limited

SHWETA SULTANIA

Digitally signed by SHWETA SULTANIA
Date: 2025.10.14 19:15:19 +05'30'

Shweta Sultania
Company Secretary and Compliance Officer

Encl: as above

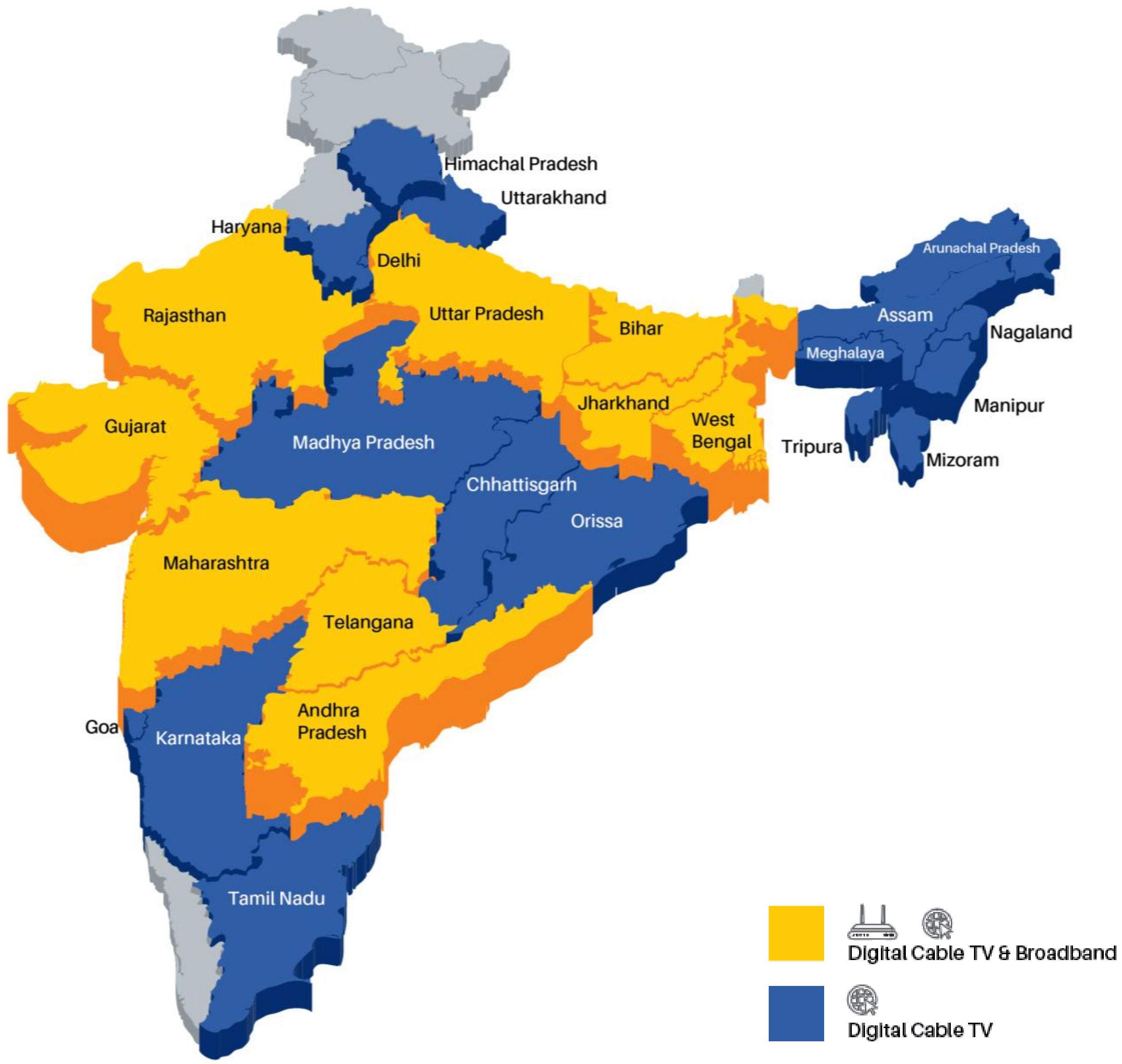
GTPL Hathway Limited

Q2 FY26 Results Update

Table of Contents

Company Overview

Leader Across Key Markets



Expanded in 3 new states in Q4 FY25 : Arunachal Pradesh, Chhattisgarh & Mizoram
Significant presence in Maharashtra, AP, Telangana, Tamil Nadu & North-East

01 # Commenced Business in 2006

02 # Footprint in 1,500+ towns in 26 States
Connecting 12 Mn+ Households

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

04 # Leading private Wireline Broadband Player
No. 1 in Gujarat**
1 Mn+ Broadband subscribers

05 #GTPL to launch HITS Platform in Q3 FY26.

Sources : ** Performance Indicators Report, TRAI*
*** Independent third party Report – FY2022*

Value Creation Over The Period Of Time

Subscriber Base

~1.6x growth in last 8 years for Digital Cable TV

~4.4x growth in last 8 years for Broadband

Growth

CAGR Growth over last 8 years

- Revenue : ~18%
- EBITDA : ~9%

Cash Positive

Free Cash Flow (FCF) generated for last 8 years

Net Worth

Net worth increased by 3x in last 8 years

Consistent Performance

- PAT Positive for last 8 years
- IND AA-/Stable
- IND A1+ (WC)

by 'India Ratings'

Dividend

Consistent Dividend paying history for last 8 years
20% dividend for FY25

Enhanced Infrastructure

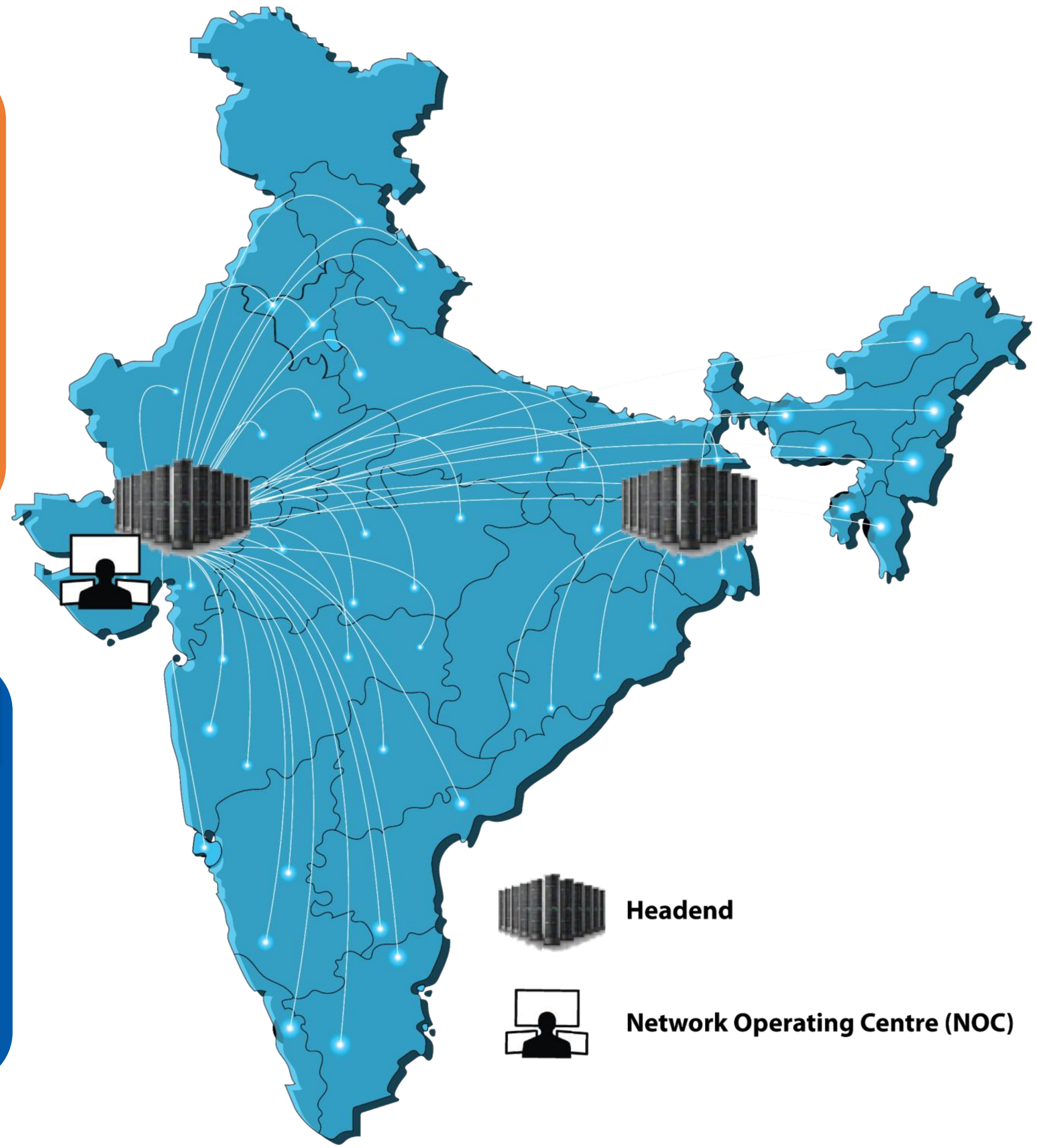
Headend Infra

- Mother Headend in Ahmedabad, Gujarat serves as epicenter for nation wide services
- 2nd Headend in Kolkata, West Bengal to enhance coverage and service quality in Eastern India
- Distributing 975+ channels including 97+ HD channels across India

Fiber Infra

Vast Optical Fiber

- Owned : 1,00,000+ KMs
- Leased : 16,000+ KMs



NOC Infra

Network Operating Centre (NOC) in Ahmedabad, Gujarat forms the backbone of operations ensuring smooth delivery of services to customers across the country

Office Infra

336 offices across India to manage operations

Technology Partners – Best in Industry

GTPL Entertain | Connect

GTPL Entertain | Connect
CONNECTION Dil se

Cloud Infrastructure
ORACLE Cloud Infrastructure

Headend
broadpeak
harmonic
ateme Transforming Video Delivery

NOC**
NOKIA
JUNIPER NETWORKS
alepo

CPE*
ZTE
NOKIA
aprecomm
OVT ORIENT VIEW TECHNOLOGY
CHANGHONG
JIUZHOU

Digital Partner
yellow.ai
affle

Database
ORACLE

Security
NAGRA KUDELSKI
FORTINET
verimatrix DRIVING TRUST

Digital Service Partner
Blacknut
DistroTV
OTTplay

Digital Presence
KONNECT INSIGHTS
SingleInterface

SMS***
magnaquest

ERP##
ORACLE FUSION APPLICATIONS

Inhouse BSS Apps#
GTPL SAATHI समझदारी वाली साझेदारी
GTPL EDGE+

The brand names mentioned are the property of their respective owners and are used here for identification purpose only

- CPE- Consumer Premises Equipment; ** NOC- Network Operation Centre
- *** SMS - Subscriber Management System; # BSS - Business Support Systems; ## ERP- Enterprise Resource Planning

Inherent Strengths

Preferred Partner
01

- 48,000+ Business Partners
- 200+ Broadcasters
- 1,750+ Enterprise Clientele
- 30+ Government Projects

Pioneer Offerings
02

- Launched Consumer application “GTPL Buzz” with features such as Live TV, Distro TV and Blacknut Cloud Games
- GTPL Genie : Bundle of Digital Cable TV + OTT
- Business App in Vernacular Languages
- Industry first Launch of Live TV on Samsung Connected TVs using TVKey Cloud

Leveraging Technology
03

- Strategic partnerships with industry leaders like Oracle, Nokia, Aprecomm, Nagra, Broadpeak and Harmonic
- GIVA – AI chatbot integrated in consumer app and website for providing seamless self-service, support & customer assistance

Pan India Presence
04

- Covering 26 states thus providing premium Digital Cable TV services nationwide & High-Speed Broadband in 11 states
- Better Negotiation Power backed by largest subscriber franchise
- Commanding presence in key markets through deep coverage

Growth Initiatives
05

- Consistently working on strategies for expanding and entering new markets
- Enhancing market presence through various initiatives and new product launches

Huge Catalogue for Entertainment
06

- Deliver the highest number of total channels from the headend combined with a seamless blend of OTT services
- 975+ Tv Channels, 97+ HD Channels, 130+ Company Owned and Operated Platform Services

Industry Dynamics & Growth Strategy

Huge Runway for Growth

Total TV households that can be targeted

~180 Mn households*

GTPL Hathway's Cable Subscribers – 9.50 Mn

Natural Growth from TV dark households buying a TV - as households come out of poverty line with rise in income: **70 to 80 Mn households***

+

Shift of DTH viewers to cable TV since quality of broadcast and no. of channels offered have become at par post digitisation:**- ~60 Mn households***

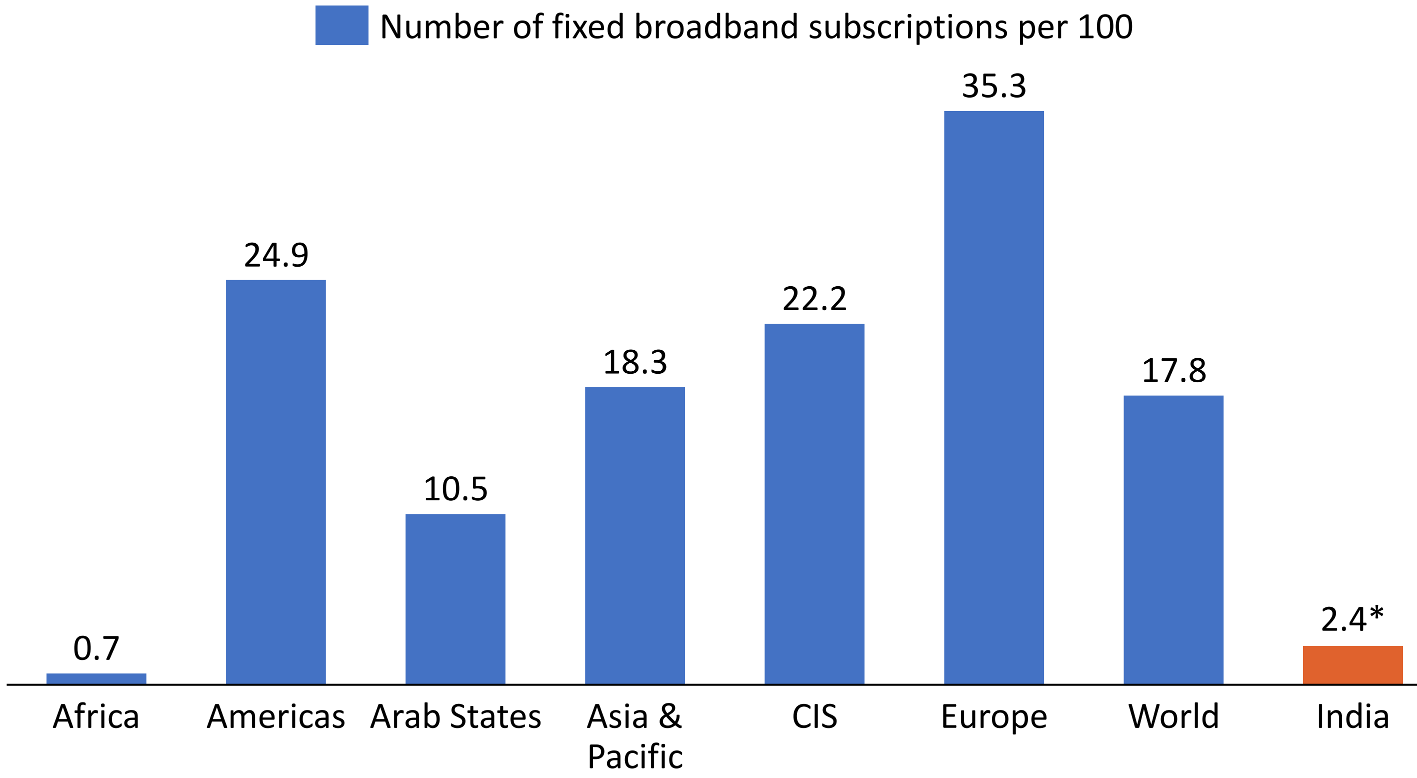
+

Industry dynamics favouring market consolidation in favour of organised players - MSO registration cancellation as well as shift from unorganised players presents opportunity for further **~40 Mn households***

Total broadband connections that can be targeted

~150 Mn households*

GTPL Hathway's Wireline Broadband Subscribers – 1.0+ Mn



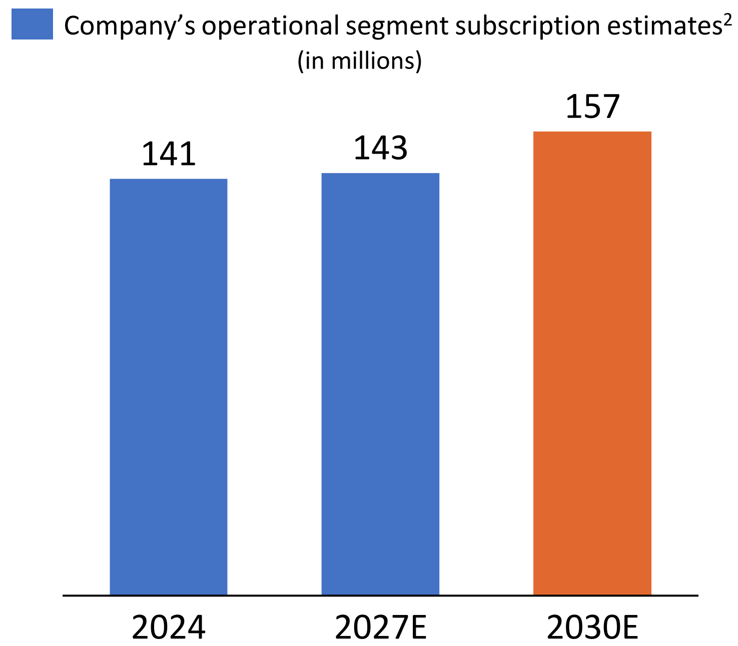
India has one of the lowest fixed broadband penetration. August 2025 wired broadband subscribers stood at 44.07Mn as per TRAI. With ~325 Mn households in India – current subscribers represent **~13.6% penetration** which is far lower than penetration in developed nations.

***Source:**, FICCI-EY 2024 Report, Global Data, ITU, Statista Company Estimates, TRAI report dated 06st Oct 2025

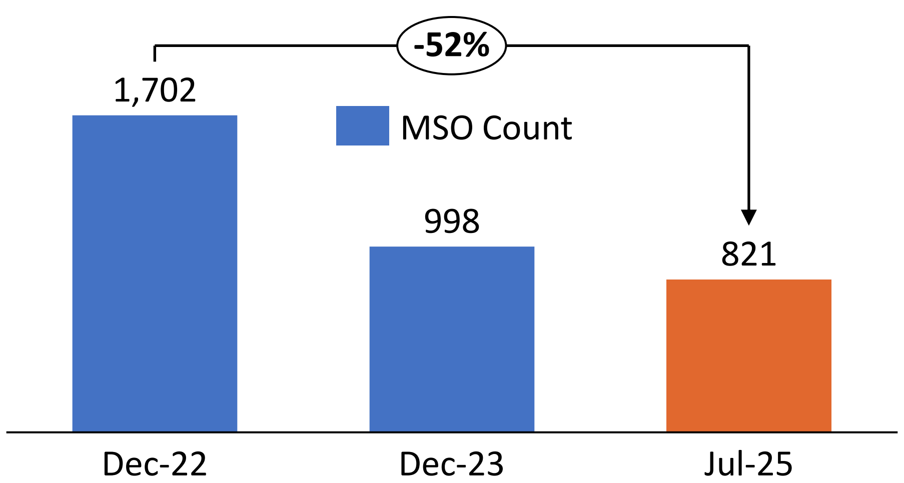
Capitalising on Favourable Industry Tides

Total TV subscriptions expected to grow to **214 million by 2030**, driven by a rising number of Indian households and increasing per capita income

TV continues to remain amongst the top media consuming platform. Aggregated viewership of **1.5 trillion gross AMA**[1] in 2024 – marginally better than 2023



Average time spent per day increased slightly to reach 3:42 hours a day **with ~56% of overall viewership from non-hindi** languages



Decrease in MSO counts indicates stringent compliance & consolidation trends for the industry

3 out of 4 LCO respondents provide or feel the need to provide wired broadband services

TV subscription in the company's target domain will continue to exhibit healthy growth driving overall operational and financial performance

The company has undertaken several strategic steps towards addressing key trends within the broadcasting industry:

- **Varying Content Preferences:** GTPL Hathway has a vast content of regional, local channels to cater to a pan-India subscriber base
- **Competitive Landscape:** Increasing competitive intensity has affected inefficient & smaller operators providing acquisition opportunities
- **Subscriber Acquisition:** The company's subscriber base has grown by 60% since 2017 because the company focussed on consumer centric initiatives such as bundling of services through its GTPL Buzz App, Live TV without set-top-box through TVKey Cloud, promoting self service through GIVA and also providing wired broadband services

Source:, FICCI-EY 2025 Report,TRAI,[1]AMA: Average minute audience, [2]TV Subscription Estimates are sum of Pay TV & Connected TV Subscriptions

Strategies to Enhance Cable TV Business

GTPL Entertain | Connect

INORGANIC ACQUISITIONS

- Opportunities to add and consolidate smaller/regional players catering to ~40 Mn Cable TV Households
- Increase in compliances leads to consolidation of industry & also triggered by cancellation of licenses by MIB of non-compliant MSOs.

CONTENT AVAILABILITY

- Distribution of Content (Broadcasting & OTT) to be available through GTPL at competitive prices
- Availability of extensive local content through platform channels in multiple languages
- Live TV channels & Distro TV service available on mobile devices without any additional cost via GTPL Buzz App.

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 Consumer Application.

HITS – EXPANSION OF MARKET & DELIVERY COST SAVING

- HITS provides ability to expand Company's reach nationwide. It enables to deliver signal seamlessly all over India including rural markets, cable-dark areas, hilly terrains and other geographies where earlier expansion was not viable due to high delivery costs. This opens up a very large growth opportunity in underserved and new markets
- Will help company to conserve delivery costs for its current business and for future expansion.

Multiple Growth Levers for Broadband Business

GTPL Entertain | Connect

Acquiring Customers

- Increased Focus on B2B model
- Digital and broadband initiatives by the Government across India
- Tapping rural Gujarat market in the digital push.

Market Size & Geographies Driving Growth

- Potential to convert 12+ Mn GTPL Digital Cable TV households
- Andhra Pradesh, Telangana, Maharashtra and rural Gujarat to drive growth.

Staying Competitive

- Improved content offerings - OTT distribution as an add-on available to all GTPL customers
- >75% of Homepass in FTTX in broadband which provides a ready infrastructure.

Factors contributing to growth

Increasing use of Internet for Consumer & Enterprise needs	Higher data usage with increased adoption of Social Media & OTT
Push for digital connectivity by the Government of India	Necessity of uninterrupted broadband services at homes

Large opportunity market size

India Wired Broadband Market stood at USD 605.37 Million in FY2023 and is expected to register a CAGR of 15.43% from FY23 to FY2028. Of the overall wired broadband market the Fibre to the Home (FTTH) segment is expected to grow at a CAGR of 17.62% during the forecast period.

Source: Report by Internet and Mobile Association of India (IAMAI) and KANTAR; Wired Broadmand Report by TechSci Research and marketxcel

GTPL
Entertain | Connect

Key Performance Indicators

Cable TV Business Performance

9.50 Mn
Active STBs[1]

8.80 Mn
Paying Subscribers

48K+
Business Partners

80%+
Digital Collection

100%
Base in prepaid business

Launch
GTPL Buzz
New customer facing App

Active Subscribers at **9.50 Mn** by Q2 FY26

Paying Subscribers at **8.80 Mn** by Q2 FY26

Launched new value-for-consumer bundled services through the **GTPL Buzz App**

Expanding aggressively **in Andhra Pradesh, Telangana, Tamil Nadu, North-East, Delhi, Haryana, Uttarakhand, Himachal Pradesh, Arunachal Pradesh & Chhattisgarh**

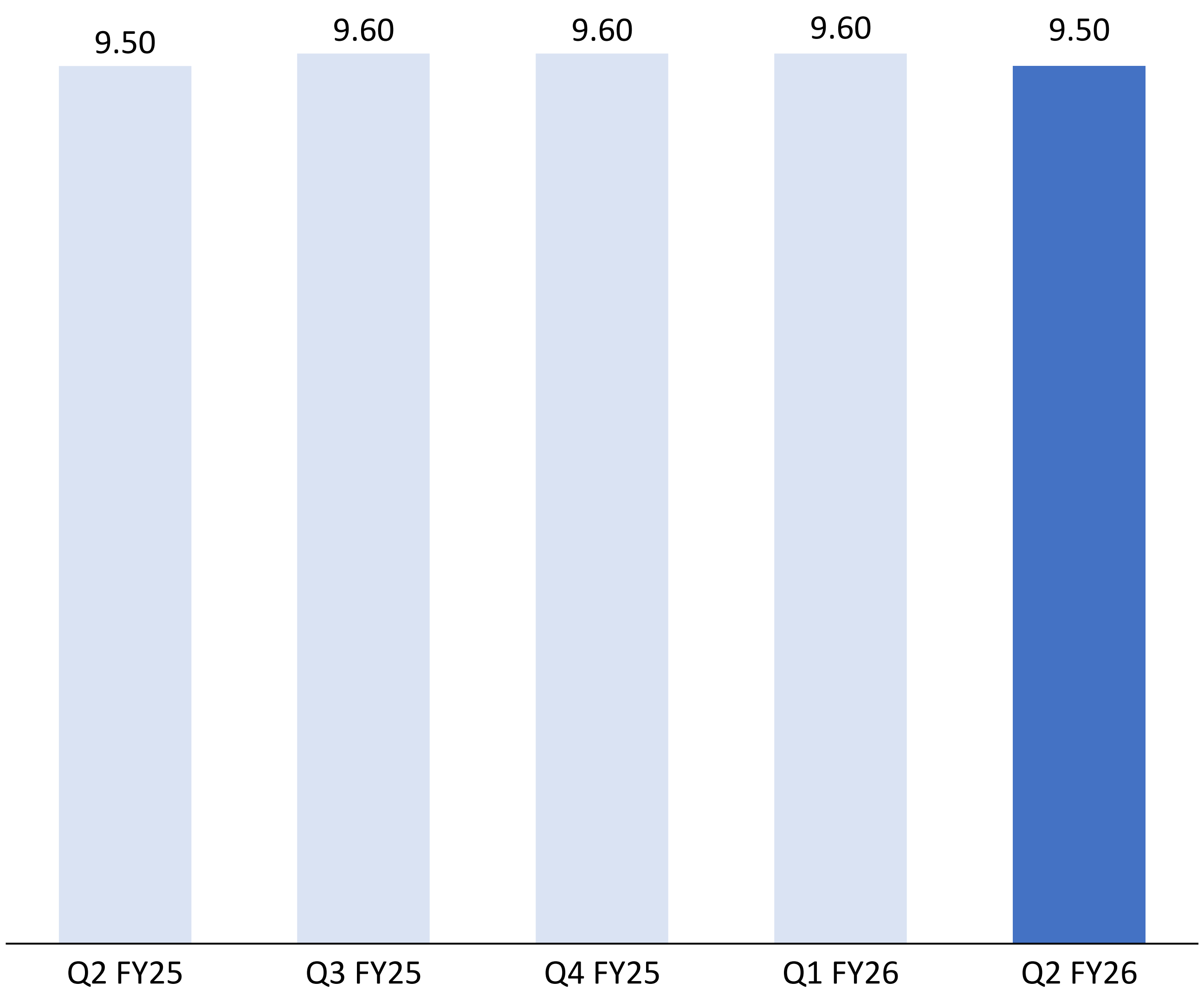
130+ Owned & Operated Channels

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

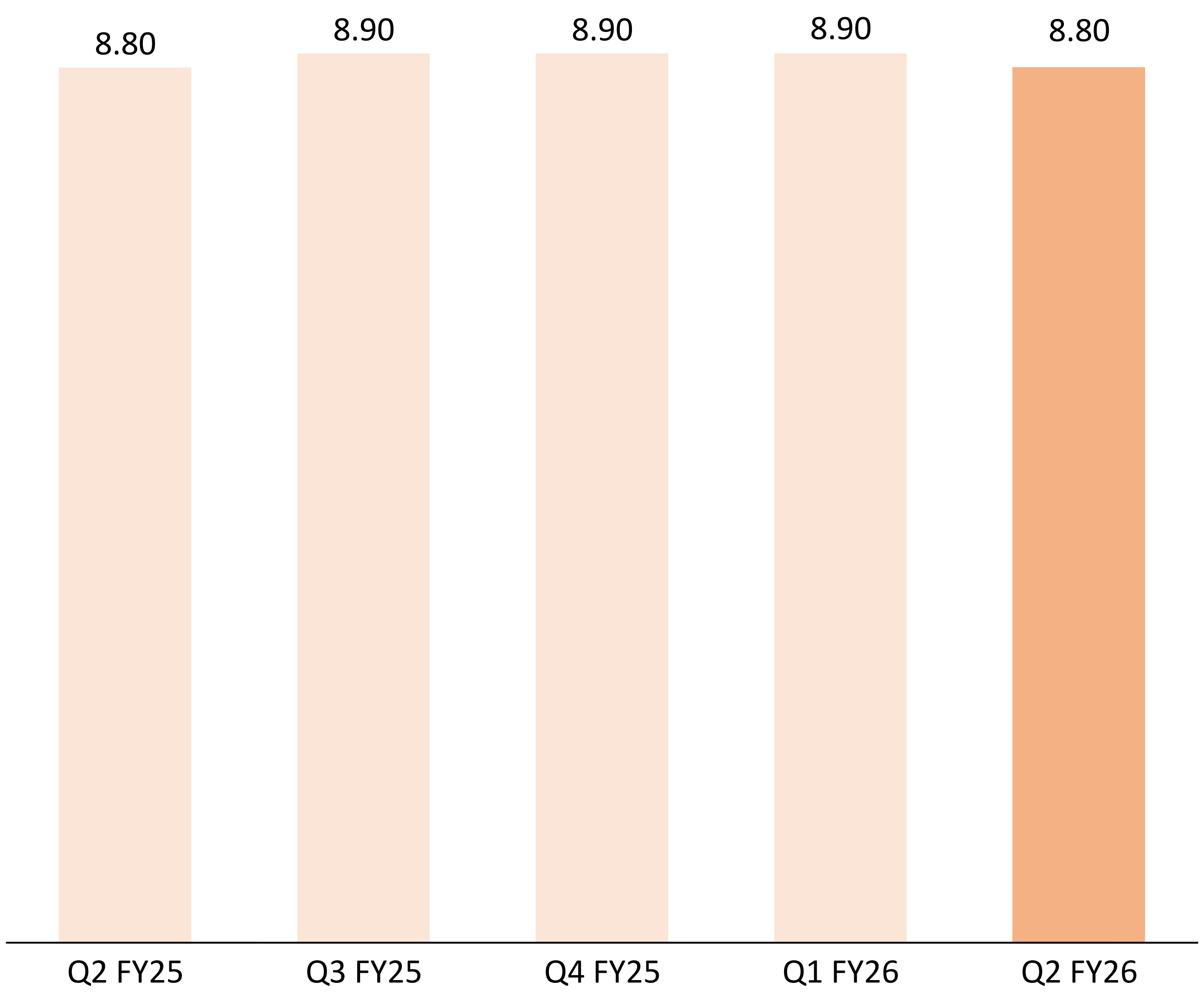
[1]Active = Active during last 60 days

Cable TV Business: Quarterly*

Active[1] Subscribers (Mn)



Paying Subscribers (Mn)



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[1]Active = Active during last 60 days

Broadband Business Performance

1050K
Active Subscribers

5.95Mn
Homepass

410GB
Average Data Consumption per month

2%
Y-o-Y Revenue Growth

200 Mbps
Speed with Unlimited Data

₹ 465/-
ARPU

Increase of **10K** (**1%**) Subscribers Y-o-Y

ARPU of **₹ 465** as of Sep 25; increased by **₹ 5** Y-o-Y

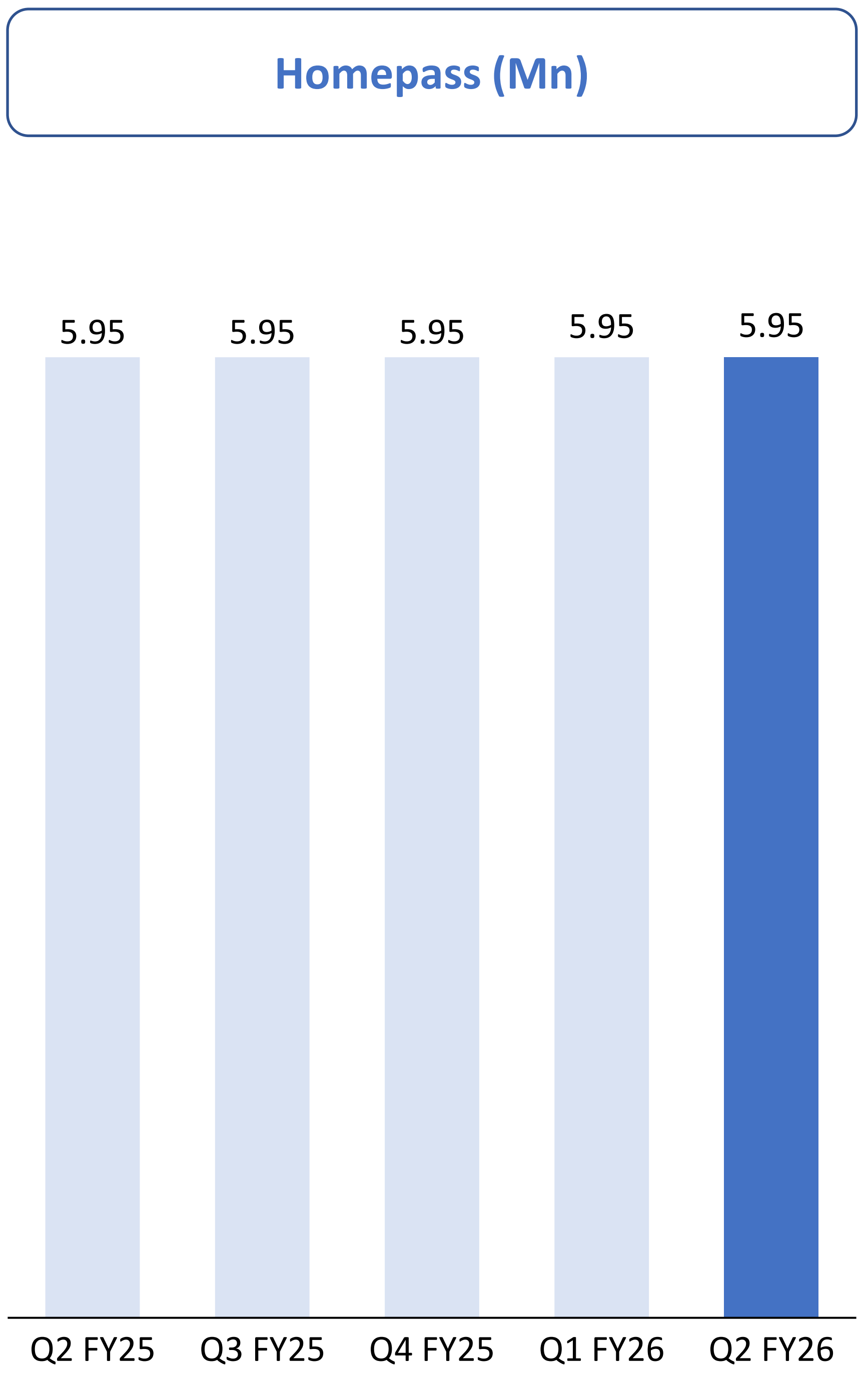
Enhanced High Speed Broadband Service offering up to **200 Mbps** coupled with Truly Unlimited Data

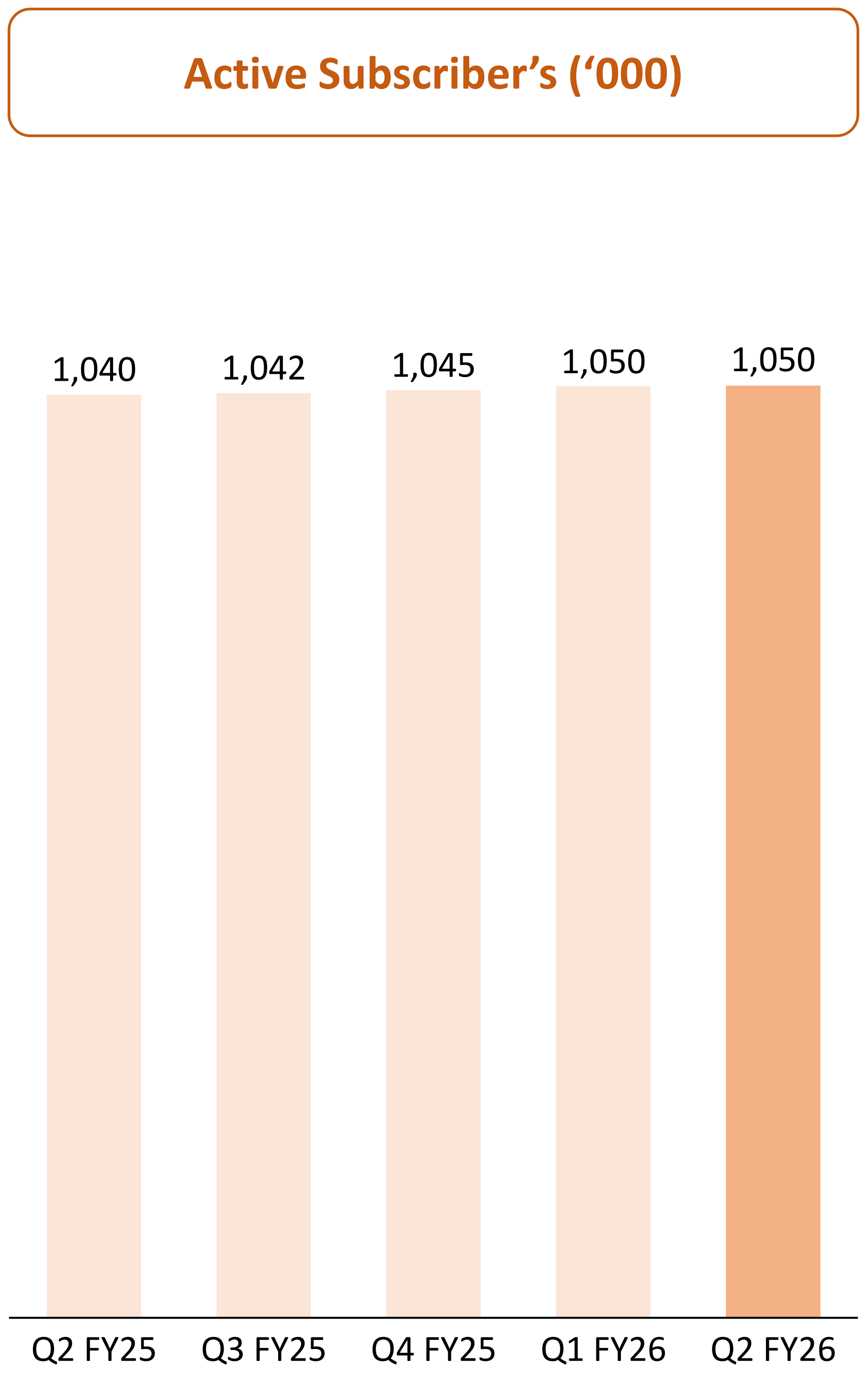
5.95 Mn Homepass; **~75%** Homepass available for FTTX conversion

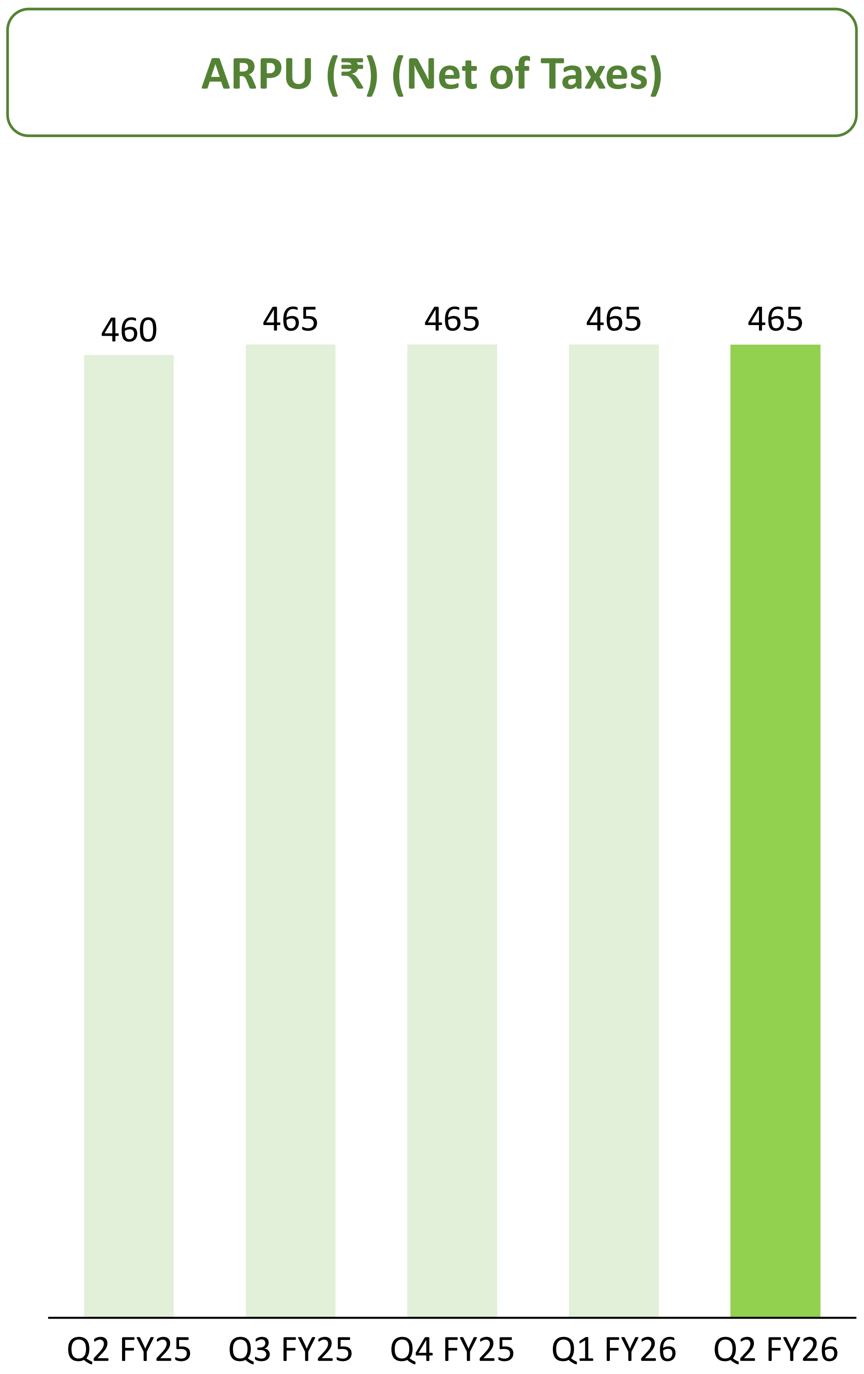
Average Data Consumption per Customer stands at **410 GB** / Month for Q2 FY26; up by **17%** Y-o-Y

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

Broadband Business: Quarterly*







* 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 6% Q-o-Q & 12% Y-o-Y

ISP Revenue up by 2% Q-o-Q & 2% Y-o-Y

2 **EBITDA**

EBITDA of ₹ 1,101 Mn in Q2 FY26

EBITDA Margin stands at 11.4% in Q2 FY26

3 **PBT**

PBT of ₹ 108 Mn in Q2 FY26

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

Profit & Loss Statement: Consolidated *

In ₹ Mn

Particulars	Q2 FY26	Q1 FY26	Q-o-Q%	Q2 FY25	Y-o-Y%	FY25
Revenue						
Subscription Income CATV	3,024	3,018	0%	3,129	-3%	12,327
Broadband ISP	1,393	1,359	2%	1,367	2%	5,456
Placement / Carriage / Marketing Incentive	4,885	4,315	13%	3,793	29%	15,693
Activation	27	27	-1%	43	-37%	161
Other Operating Income	261	318	-18%	224	17%	1,134
Other Income	59	54	8%	65	-9%	300
Total Income	**9,649**	**9,091**	**6%**	**8,620**	**12%**	**35,072**
Expenditure						
Pay Channel Cost	6,160	5,604	10%	5,106	21%	20,733
Employee Cost	418	390	7%	414	1%	1,592
Other Operating, Admin & Selling Exp.	1,970	1,975	0%	1,962	0%	8,122
Total Expenditure	**8,548**	**7,968**	**7%**	**7,482**	**14%**	**30,447**
EBITDA	**1,101**	**1,123**	**-2%**	**1,138**	**-3%**	**4,625**
EBITDA %	**11.4%**	**12.4%**		**13.2%**		**13.2%**
Depreciation/Amortization	909	914	-1%	905	0%	3,688
Finance cost - Borrowing	57	61	-7%	44	29%	241
Finance cost - IND AS 116	30	25	20%	16	87%	56
Profit before Tax & Exceptional item	**105**	**122**	**-14%**	**173**	**-39%**	**641**
Exceptional Items	-			-		(1)
Share of Profit/(Loss) from Associate and JVs	2	(0)		6		2
PBT	**108**	**122**		**180**		**641**
Tax	34	49		42		149
PAT before Other Comprehensive Income	**74**	**73**		**137**		**492**
Share of Non Controlling Interest	18	32		(10)		(13)
Other Comprehensive Income	1	(0)		1		0
PAT	**93**	**105**		**129**		**479**

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

Analysis on Operating Margin : Consolidated *

In ₹ Mn

Particulars	Q2 FY26	Q1 FY26	Q-o-Q%	Q2 FY25	Y-o-Y%	FY25
Revenue						
Subscription Income CATV	3,024	3,018	0%	3,129	-3%	12,327
Broadband ISP	1,393	1,359	2%	1,367	2%	5,456
Other Operating Income	261	318	-18%	224	17%	1,134
Total Income	**4,678**	**4,695**		**4,720**		**18,917**
Expenditure						
Net Pay Channel Cost	**1,275**	**1,289**	**-1%**	**1,312**	**-3%**	**5,039**
Pay Channel Cost	*6,160*	*5,604*	*10%*	*5,106*	*21%*	*20,733*
Placement / Carriage / Marketing Incentive	*(4,885)*	*(4,315)*	*13%*	*(3,793)*	*29%*	*(15,693)*
Employee Cost	418	390	7%	414	1%	1,592
Other Operating, Admin & Selling Exp.	1,970	1,975	0%	1,962	0%	8,122
Total Expenditure	**3,663**	**3,653**		**3,688**		**14,754**
Operating EBITDA	**1,016**	**1,042**		**1,031**		**4,163**
Operating EBITDA %	**22%**	**22%**		**22%**		**22%**
Activation	27	27	-1%	43	-37%	161
Other Non Operating Income	59	54	8%	65	-9%	300
Published EBITDA	**1,101**	**1,123**		**1,138**		**4,625**

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

Balance Sheet: Consolidated *

In ₹ Mn

Liabilities	As on 30th Sep 2025	As on 31st Mar 2025
Equity		
Equity Share Capital	1,125	1,125
Other Equity	11,613	11,804
Total Equity	**12,737**	**12,929**
Non-Current Liabilities		
Financial Liabilities		
Borrowings	798	559
Other Financial Liabilities	936	649
Deferred Tax Liabilities	849	789
Other Non-Current Liabilities	278	278
Total Non-Current Liabilities	**2,861**	**2,275**
Current Liabilities		
Financial Liabilities		
Borrowings	1,828	1,725
Trade Payables	14,481	9,520
Other Financial Liabilities	2,565	2,675
Other current liabilities	3,508	3,556
Current Tax liability(Net)	0	2
Total Current Liabilities	**22,381**	**17,477**
Total Liabilities	**37,980**	**32,681**

Assets	As on 30th Sep 2025	As on 31st Mar 2025
Non-Current Assets		
Fixed Assets	21,764	21,755
Financial Assets		
Investments	112	119
Other Financial Assets	302	419
Deferred Tax Assets	327	325
Other non-current Assets	1,146	997
Total Non-Current Assets	**23,650**	**23,615**
Current Assets		
Inventories	294	252
Financial Assets		
Trade Receivables	11,381	5,884
Cash, Cash equivalents & Bank Balances	1,093	1,162
Other Financials Assets	171	229
Current Tax Assets (Net)	-	-
Other Current Assets	1,390	1,539
Total Current Assets	**14,329**	**9,066**
Total Assets	**37,980**	**32,681**

- ❖ Increase in Trade Payables by ₹ 4,961 Mn primarily due to Broadcasters Payables

- ❖ Increase in Trade Receivables by ₹ 5,497 Mn mainly due to Broadcasters Receivables

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

Standalone Financials

Financial Highlights : Standalone *

1 Revenue	Total Revenue up by 7% Q-o-Q & 17% Y-o-Y
2 EBITDA	EBITDA of ₹ 593 Mn in Q2 FY26 EBITDA Margin stands at 9.3% in Q2 FY26
3 PBT	PBT of ₹ 73 Mn in Q2 FY26

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

Profit & Loss Statement : Standalone *

In ₹ Mn

Particulars	Q2 FY26	Q1 FY26	Q-o-Q%	Q2 FY25	Y-o-Y%	FY25
Revenue						
Subscription Income CATV	2,191	2,250	-3%	2,207	-1%	8,651
Placement / Carriage / Marketing Incentive	3,831	3,305	16%	2,881	33%	11,831
Activation	13	13	1%	16	-16%	67
Other Operating Income	322	378	-15%	287	12%	1,386
Other Income	44	43	2%	62	-28%	296
Total Income	**6,402**	**5,990**	**7%**	**5,452**	**17%**	**22,230**
Expenditure						
Pay Channel Cost	4,615	4,190	10%	3,684	25%	14,796
Employee Cost	156	188	-17%	199	-22%	771
Other Operating, Admin & Selling Exp.	1,039	1,020	2%	919	13%	4,005
Total Expenditure	**5,809**	**5,398**	**8%**	**4,801**	**21%**	**19,572**
EBITDA	**593**	**592**	**0%**	**651**	**-9%**	**2,658**
EBITDA %	**9.3%**	**9.9%**		**11.9%**		**12.0%**
Depreciation/Amortization	447	443	1%	421	6%	1,750
Finance cost	73	72	2%	41	80%	222
Profit before Tax & Exceptional item	**73**	**78**	**-6%**	**189**	**-61%**	**686**
Exceptional Items	-	-		-		(38)
PBT	**73**	**78**	**-6%**	**189**	**-61%**	**648**
Tax	21	21		49		170
PAT before Other Comprehensive Income	**53**	**56**	**-7%**	**140**	**-62%**	**478**
Add/(Less) Other Comprehensive Income	1	(0)		1		(1)
PAT	**54**	**56**	**-4%**	**141**	**-62%**	**477**

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

Balance Sheet : Standalone *

In ₹ Mn

Liabilities	As on 30th Sep 2025	As on 31st Mar 2025
Equity		
Equity Share Capital	1,125	1,125
Other Equity	7,830	7,945
Total Equity	**8,954**	**9,070**
Non-Current Liabilities		
Financial Liabilities		
Borrowings	715	448
Other Non-Current Liabilities	935	654
Total Non-Current Liabilities	**1,650**	**1,102**
Current Liabilities		
Financial Liabilities		
Borrowings	1,443	1,175
Trade Payables	10,555	6,212
Other Financial Liabilities	1,992	2,154
Other current liabilities	965	1,048
Total Current Liabilities	**14,955**	**10,589**
Total Liabilities	**25,560**	**20,761**

Assets	As on 30th Sep 2025	As on 31st Mar 2025
Non-Current Assets		
Fixed Assets	9,864	9,676
Financial Assets		
Investments	4,008	3,907
Loans & Other Financial Assets	818	1,102
Deferred Tax assets	-	11
Other non-current Assets	628	515
Total Non-Current Assets	**15,318**	**15,212**
Current Assets		
Inventories	283	248
Financial Assets		
Trade Receivables	8,569	3,932
Cash, Cash equivalents & Bank Balances	465	327
Loans & Other Financial Assets	42	38
Other Current Assets	882	1,004
Total Current Assets	**10,242**	**5,549**
Total Assets	**25,560**	**20,761**

- Increase in Trade Payables by ₹ 4,343 Mn primarily due to Broadcasters Payables

- Increase in Trade Receivables by ₹ 4,637 Mn mainly due to Broadcasters Receivables

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

Investor Conference Call Details

emkay connect

EMKAY GLOBAL FINANCIAL SERVICES LTD

is pleased to invite you for a conference call to discuss **Q2 and H1 FY26** results with

Mr. Anirudhsinh Jadeja – Promoter and Managing Director

Mr. Piyush Pankaj – Business Head B2B (CATV, Broadband) and Chief Strategy Officer

Mr. Saurav Banerjee – Chief Financial Officer

GTPL Hathway Limited

On Wednesday, October 15, 2025, at 4:00 PM (IST)

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