

The Manager - Listing

**National Stock Exchange of India Limited** 

(Scrip Symbol: PVRINOX)

The Manager – Listing

**BSE Limited** 

(Scrip Code: 532689)

Sub: 1st Quarter, FY 2025-26 - Investor Presentation

Dear Sir / Madam,

Please find attached presentation on Investor update for the First Quarter ended on 30th June, 2025.

This is for your information and to all concerned.

Yours sincerely,

For PVR INOX Limited

Murlee Manohar Jain SVP - Company Secretary & Compliance Officer

Encl: A/a.









# PVRINOX

AUGUST 6TH, 2025

## INVESTOR UPDATE Q1 FY'26

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| Particulars          | Slide No. |
|----------------------|-----------|
| Key Highlights       | 5         |
| Box Office Update    | 7         |
| Result Summary       | 13        |
| Screen Growth Update | 20        |
| Content Lineup       | 23        |

## **KEY FINANCIAL HIGHLIGHTS**



| (INR Mn)  | REVENUE & GROWTH% | EBITDA & EBITDA%  | PAT & PAT %          |
|-----------|-------------------|-------------------|----------------------|
| Q1, FY'26 | 14,879 +23.1%     | 1,141 +7.7%       | <b>-335</b> -2.3%    |
| Q1, FY'25 | 12,086            | <b>-199</b> -1.6% | <b>-1,366</b> -11.3% |

## **KEY OPERATING HIGHLIGHTS**



| (INR Mn)  | ADMITS (Mn) ATP (INR) |           | SPH (INR)     |
|-----------|-----------------------|-----------|---------------|
| Q1, FY'26 | 34.0                  | 254 +8.1% | 148           |
| Q1, FY'25 | 30.4 +12.1%           | 235       | +10.2%<br>134 |















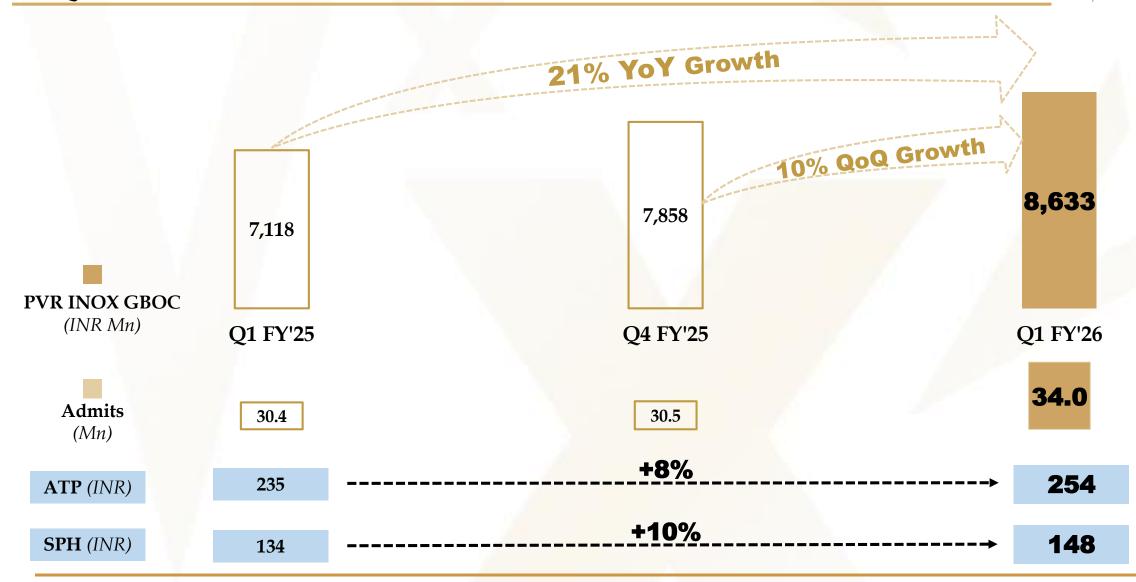






## **BOX OFFICE UPDATE**

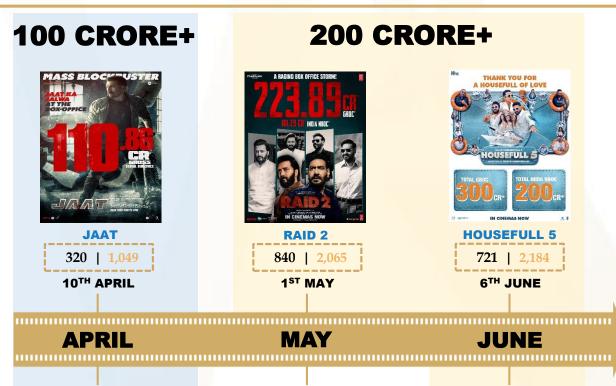
## SEQUENTIAL AND YOY GROWTH IN BOX OFFICE COLLECTIONS PYR INOX



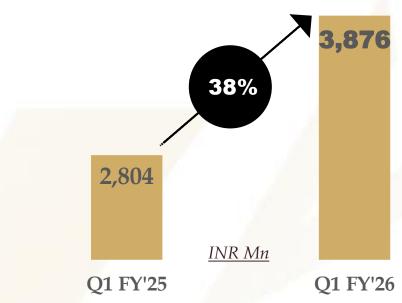
Robust performance across all key parameters with Highest ever SPH

## STEADY VOLUME DRIVES BOLLYWOOD GROWTH





### PVR INOX BOLLYWOOD GBOC (1)



(1) Hindi + Hindi Dubbed GBOC increased by 21% from INR 3,269 mn to INR 3,946 mn

- Back-to-back hits and a steady Hindi release slate has built strong momentum for Bollywood in Q1
- ► Healthy performance driven by five ₹100 Cr+ films and less reliance on big ticket blockbusters.

#### 18<sup>TH</sup> APRIL



#### 23rd MAY



380 | 857

20<sup>TH</sup> JUNE

SITAARE ZAMEEN PAR

960 | 2,006

Life time Box Office collections have been considered

(2) Source: Ormax Media, Sacnilk, Company estimates

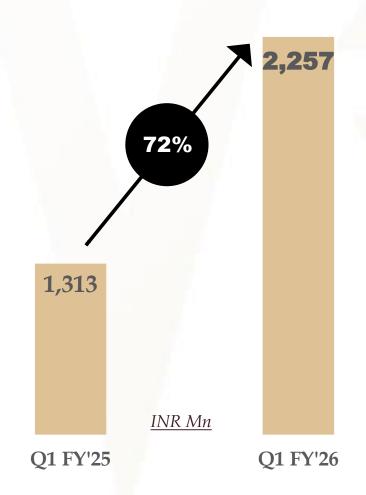
PVR INOX GBOC | India GBOC(2) (INR Mn)

510 | 1,108

## FRANCHISE TITLES FUEL HOLLYWOOD'S PERFORMANCE



## PVR INOX Hollywood GBOC

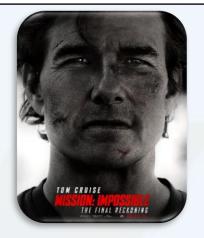


### Hollywood Box Office crosses INR 200 crs after almost 2 years





722 | 1,086



**FINAL RECKONING** 

670 | 1,234



410 | 749



191 | 282



**HOW TO TRAIN YOUR DRAGON** 

PVR INOX GBOC | India GBOC (1) (INR Mn)

## REGIONAL BOX OFFICE DEMONSTRATES STABILITY



## **PVR INOX Regional GBOC**

2,537 2,429

INR Mn

Q1 FY'26







**THUDARUM** (MALAYALAM) 170 | 1,416



**TOURIST FAMILY (TAMIL)** 163 | 717



**KUBERAA** (TAMIL/TELUGU)

152 | 1,065



HE THIRD CASE (TELUGU)

140 | 945

PVR INOX GBOC | India GBOC (1) (INR Mn)

Q1 FY'25

## MANUFACTURING FOOTFALLS



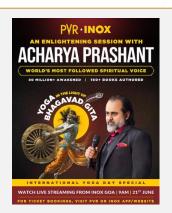
### 1. BLOCKBUSTER TUESDAYS



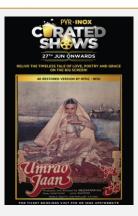
INITIATIVE (1)
BROUGHT
~1 MILLION
NEW + LAPSED(2)
TRANSACTORS
TO CINEMAS

### 2. ALTERNATE PROGRAMMING (INCL. RE-RELEASES)









LTERNATE PROGRAMMING CONTRIBUTED 0.5 MN+ FOOTFALLS TO THE QUARTER

### 3. AFFORDABLE PRICING INITIATIVES









- (1) Analysis done for 15 weeks (8th Apr 15th July)
- (2) People who have not transacted for more than 6 months



## RESULT SUMMARY

## RESULT SUMMARY (CONSOLIDATED) - Q1, FY'26 VS Q1, FY'25



|                             |          | Q1, FY'26            |                        |          | Q1, FY′25            |                        |
|-----------------------------|----------|----------------------|------------------------|----------|----------------------|------------------------|
| Particulars (INR Mn)        | Reported | Ind-AS 116<br>Impact | Ind-AS 116<br>Adjusted | Reported | Ind-AS 116<br>Impact | Ind-AS 116<br>Adjusted |
| Total Income                | 15,015   | 136                  | 14,879                 | 12,194   | 108                  | 12,086                 |
| Expenses                    | 10,718   | -3,020               | 13,738                 | 9,392    | -2,893               | 12,285                 |
| EBITDA                      | 4,297    | 3,156                | 1,141                  | 2,802    | 3,001                | -199                   |
| EBITDA Margin               | 28.6%    |                      | 7.7%                   | 23.0%    |                      | <b>-1.6</b> %          |
| Depreciation & Amortization | 3,085    | 1,962                | 1,123                  | 3,142    | 1,978                | 1,164                  |
| EBIT                        | 1,212    | 1,194                | 18                     | -340     | 1,023                | -1,363                 |
| Finance Costs               | 1,914    | 1,474                | 440                    | 2,041    | 1,590                | 451                    |
| Share in net loss of JV     | -1       |                      | -1                     | 0        |                      | 0                      |
| PBT                         | -703     | -280                 | -423                   | -2,381   | -567                 | -1,814                 |
| Corporate Tax               | -158     | -70                  | -88                    | -591     | -143                 | -448                   |
| PAT                         | -545     | -210                 | -335                   | -1,790   | -424                 | -1,366                 |
| PAT Margin                  | -3.6%    |                      | -2.3%                  | -14.7%   |                      | -11.3%                 |
| EPS - Basic (INR)           | -5.51    |                      | -3.39                  | -18.21   |                      | -13.89                 |
| EPS - Diluted (INR)         | -5.51    |                      | -3.39                  | -18.21   |                      | -13.89                 |
|                             |          |                      |                        |          |                      |                        |

## **KEY OPERATING NUMBERS**



| Particulars                             | Units | Q1, FY′26       | Q1, FY'25       |                             |
|---|-------|-----------------|-----------------|-----------------------------|
| Operating Numbers                       |       | Reported<br>(A) | Reported<br>(B) | YoY Change (%)<br>(A / B-1) |
| Cinema Count (at the end of period) (1) |       | 352             | 361             | -2.5%                       |
| Screen Count (at the end of period) (1) |       | 1,743           | 1,754           | -0.6%                       |
| Weighted Average Screens (2)            |       | 1,689           | 1,702           | -0.8%                       |
| Admits                                  | Mn    | 34.0            | 30.4            | 12.1%                       |
| Occupancy                               | %     | 22.0%           | 20.3%           | 167 bps                     |
| Avg. Ticket Price (ATP)                 | INR   | 254             | 235             | 8.1%                        |
| F&B Spend per Head (SPH)                | INR   | 148             | 134             | 10.2%                       |

<sup>(1)</sup> Includes 51 management screens across 14 cinemas which are managed under a 'Management fee' model. The above table excludes Operating KPIs of management properties

<sup>(2)</sup> Weighted average screens has been calculated basis the actual no. of days of operations of each cinema during the period, excluding 51 management screens across 14 cinemas

## **REVENUE ANALYSIS**



| Particulars (INR Mn)         | Q1, FY′26       | Q1,             |
|------------------------------|-----------------|-----------------|
| Weighted Average Screens (1) | 1,689           | 1,702           |
| <u>Financials</u>            | Reported<br>(A) | Reported<br>(B) |
| Sale of Movie Tickets        | 7,281           | 5,935           |
| Sale of Food & Beverages     | 4,919           | 4,018           |
| Advertisement Income         | 1,096           | 934             |
| Convenience Fees             | 481             | 438             |
| Other Operating Income (2)   | 914             | 582             |
| Other Income                 | 188             | 179             |
| Total Income                 | 14,879          | 12,086          |

Consolidated Financials

FY'25

-0.8%

YoY Change (%) (A / B-1)

22.7%

22.4%

17.3%

9.8%

57.0%

5.0%

23.1%

<sup>(1)</sup> Weighted average screens has been calculated basis the actual no. of days of operations of each cinema during the period, excluding 51 management screens across 14 cinemas (2) Increase in Other operating income due to:

Increase in 'Income from Film Distribution' from INR 309 mn in Q1 FY'25 to INR 698 mn in Q1 FY'26 for distributing 'Raid 2', 'Sitaare Zameen Par', 'Maa', 'Ballerina' etc.

<sup>➤</sup> Increase in 'Management fees' from INR 11 mn in Q1 FY'25 to INR 24 mn in Q1 FY'26

## FIXED EXPENSE ANALYSIS - COMPARABLE CINEMAS



| Particulars (INR Mn)            | Q1, FY′26 | Q1, I | FY′25 |
|---------------------------------|-----------|-------|-------|
| Comparable Screens (1)          | 1,585     | 1,585 | 0%    |
| Fixed Cost                      |           |       |       |
| Rent                            | 2,868     | 2,700 | 6.2%  |
| CAM                             | 834       | 806   | 3.6%  |
| Rent + CAM                      | 3,703     | 3,505 | 5.6%  |
| Personnel                       | 1,491     | 1,448 | 3.0%  |
| Electricity & Water / Utilities | 923       | 946   | -2.4% |
| Other Expenses                  | 1,554     | 1,563 | -0.6% |
| Other Fixed Costs               | 3,968     | 3,957 | 0.3%  |
| <b>Total Fixed Expenses</b>     | 7,671     | 7,462 | 2.8%  |

## **Continued Fixed Cost Control**

<sup>(1)</sup> Comparable screens are screens which were fully operational in both the periods. Excludes Lanka

## **EXPENSE ANALYSIS - CONSOLIDATED**



| Particulars (INR Mn)                   | Q1, FY'26    | Q1              | , FY'25                     |
|--|--------------|-----------------|-----------------------------|
| Weighted Average Screens (1)           | 1,689        | 1,702           | -0.8%                       |
| Variable Cost                          | Reported (A) | Reported<br>(B) | YoY Change (%)<br>(A / B-1) |
| FHC (%)                                | 46.1%        | 44.2%           | 184 bps                     |
| COGS (%)                               | 23.4%        | 24.5%           | -117 bps                    |
| Fixed Cost                             |              |                 |                             |
| Rent                                   | 3,180        | 3,029           | 5.0%                        |
| CAM                                    | 927          | 891             | 4.0%                        |
| Personnel                              | 1,726        | 1,643           | 5.1%                        |
| Electricity & Water / Utilities        | 1,023        | 1,066           | -4.0%                       |
| Other Expenses ex Movie Dist., Print   | 1,788        | 1,779           | 0.5%                        |
| Total Fixed Expenses ex Movie Dist.    | 8,644        | 8,408           | 2.8%                        |
| Movie Dist., Print charges (2)         | 1,094        | 421             | 159.9%                      |
| Total Fixed Expenses incl. Movie Dist. | 9,738        | 8,829           | 10.3%                       |

Consolidated Financials

<sup>(1)</sup> Weighted average screens has been calculated basis the actual no. of days of operations of each cinema during the period, excluding 51 management screens across 14 cinemas

<sup>(2)</sup> Expenses relating to Distribution of movies

## CONSISTENT DEBT REDUCTION POST MERGER





| (INR Mn)          | 31 Mar'23 | 31 Mar'24 | 31 Mar'25 | 30 June'25 |
|-------------------|-----------|-----------|-----------|------------|
| <b>Gross Debt</b> | 17,927    | 17,177    | 14,908    | 14,335     |
| Cash              | 3,623     | 4,237     | 5,386     | 5,420      |
| Net Debt          | 14,304    | 12,940    | 9,522     | 8,915      |

38% Reduction in Net Debt Post Merger by INR 5,389 Mn



## SCREEN GROWTH UPDATE



| #  | CINEMAS OPENED                               | MODEL       | OPENING DATE | SCREENS |
|----|--|-------------|--------------|---------|
| 1. | PVR ELAN MIRACLE 84, GURGAON                 | LEASE       | 25-APR-25    | 6       |
| 2. | PVR ZORA MALL, RAIPUR                        | FOCO        | 25-APR-25    | 5       |
| 3. | PVR KA MALL, JABALPUR                        | FOCO        | 30-APR-25    | 4       |
|    | PVR DIRECTOR'S CUT, MALL OF INDIA, NOIDA (1) | ASSET LIGHT | 2-MAY-25     | 5       |
|    | NEW SCREENS OPENED IN Q1 FY'26               |             |              | 20      |

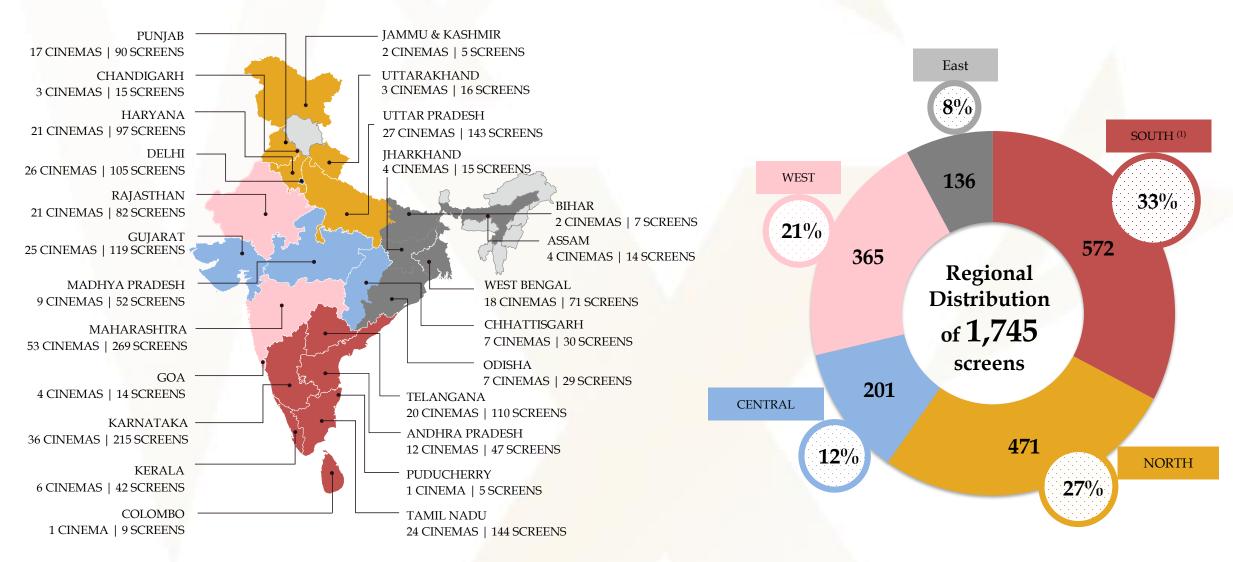
<sup>(1) 5</sup> DIRECTOR'S CUT SCREENS WERE ADDED TO OUR EXISTING CINEMA IN MALL OF INDIA, NOIDA

## Expect to open 90 - 100 New Screens in FY'26

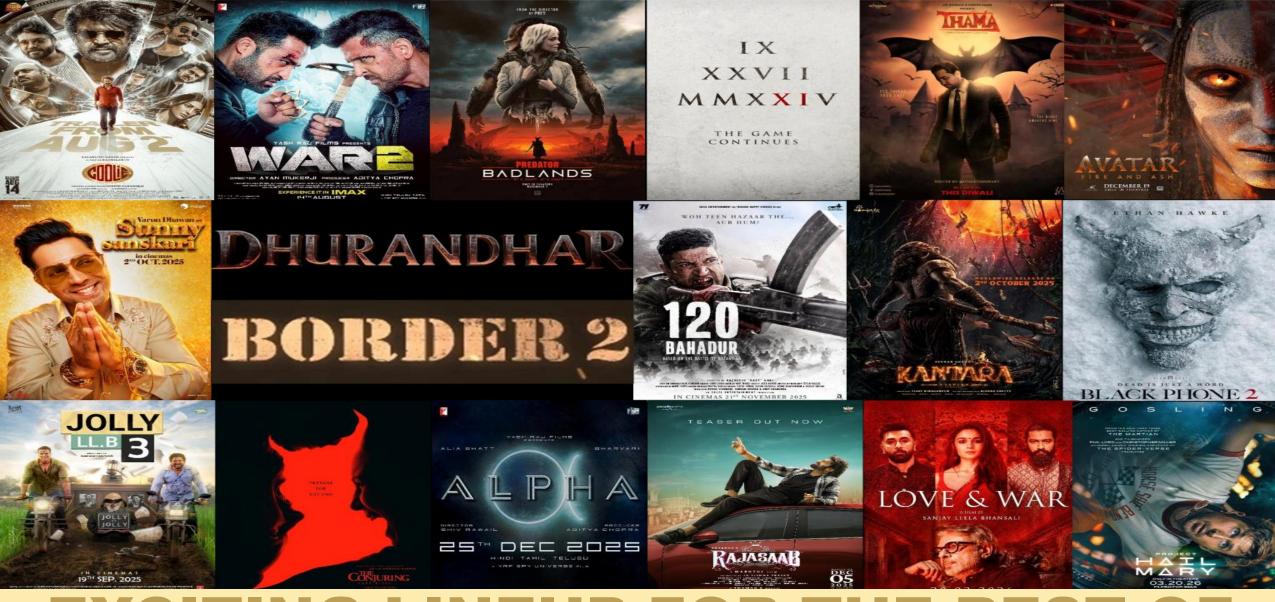
<sup>4</sup> SCREENS AT INOX SMR VINAY MALL, HYDERABAD WERE ADDED ON 4<sup>TH</sup> JULY'25 2 SCREENS AT INOX PACIFIC MALL, JASOLA, DELHI WERE SURRENDERED ON 22<sup>nd</sup> JULY'25

## DIVERSIFIED SCREEN NETWORK OF 1,745 SCREENS IN 111 CITIES PYR INOX





Note: Includes 14 Management Properties with 51 screens Map not to scale, Screen Portfolio as on date



EXCITING LINEUP FOR THE REST OF THE YEAR





## WAR 2

CAST HRITIK ROSHAN, JR NTR, KIARA ADVANI

DIRECTOR AYAN MUKERJI

HINDI, TAMIL, TELUGU

14TH AUG'2025



#### COOLIE

CAST RAJNIKANTH

DIRECTOR LOKESH KANAGARAJ

TAMIL, KANNADA, TELUGU, HINDI

14ST AUG'2025



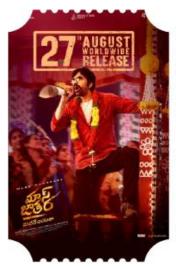
#### NOBODY 2

CAST BOB ODENKIRK, CONNIE NIELSEN, RZA

DIRECTOR TIMO TJAHJANTO

**ENGLISH** 

22ND AUG'2025



#### MASS JATARA

CAST RAVI TEJA, SREE LEELA

DIRECTOR BHANU BOGAVARAPU

**TELUGU** 

27TH AUG'2025



#### THE CONJURING: LAST RITES IMAX/ICE

CAST VERA FARMIGA, PATRICK WILSON

DIRECTOR MICHAEL CHAVES

**ENGLISH** 

05TH SEP'2025



#### **BAAGHI 4**

CAST TIGER SHROFF, SARA ALI KHAN

DIRECTOR AHMED KHAN

HINDI

05TH SEP'2025



## THE BENGAL FILES

CAST ANUPAM KHER, MITHUN CHAKRABORTY, PUNEET ISSAR

DIRECTOR VIVEK AGNIHOTRI

HINDI

05TH SEP'2025



#### MADHARASI

CAST SIVAKARTHIKEYAN, RUKMINI VASANTH

DIRECTOR AR MURUGADOSS

TAMIL, TELUGU

05TH SEP'2025





#### MIRAI

CAST TEJA SAJJA, RITIKA NAYAK

DIRECTOR KARTHIK GHATAMANENI

**TELUGU** 

05TH SEP'2025



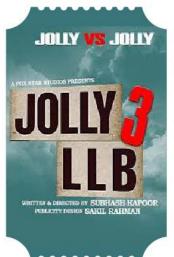
#### **NIKAA ZAILDAR 4**

CAST AMMY VIRK, SONAM BAJWA

DIRECTOR SIMERJIT SINGH

PUNJABI

12<sup>™</sup> SEP'2025



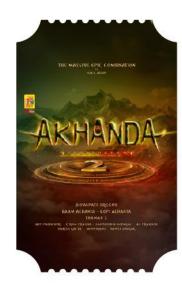
#### **JOLLY LLB 3**

CAST AKSHAY KUMAR, ARSHAD WARSI, HUMA QURESHI

DIRECTOR SUBHASH KAPOOR

HINDI

19TH SEP'2025



#### **AKHANDA 2**

CAST BALAKRISHNA

DIRECTOR BOYAPATI SEENU

TELUGU

25<sup>™</sup> SEP'2025



#### SAW XI

CAST TOBIN BELL, COSTAS MANDYLOR

DIRECTOR
KEVIN GREUTERT
ENGLISH

26TH SEP'2025



#### **IDLI KADAI**

CAST DHANUSH, NITHYA MENEN

**DIRECTOR**DHANUSH

TAMIL





#### EK DEEWANE KI DEEWANIYAT

CAST HARSHVARDHAN RANE, SONAM BAJWA

DIRECTOR MILAP ZAVERI

HINDI

02<sup>ND</sup> OCT'2025



#### KANTARA: A LEGEND CHAPTER 1

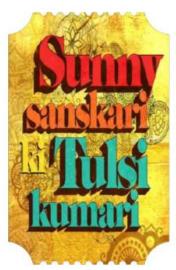
CAST RISHAB SHETTY

DIRECTOR RISHAB SHETTY

KANNADA, TAMIL, TELUGU, HINDI

02ND OCT'2025





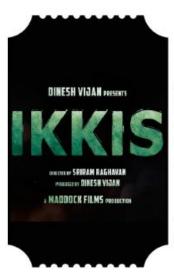
#### SUNNY SANSKARI KI TULSI KUMARI

CAST VARUN DHAVAN, JANHVI KAPOOR

DIRECTOR SHASHANK KHAITAN

HINDI

02ND OCT'2025



#### IKKIS

CAST DHARMENDRA, AGASTYA NANDA, SIMAR BHATIA, JAIDEEP AHLAWAT

DIRECTOR SRIRAM RAGHAVAN

HINDI

02ND OCT'2025



## TRON : ARES

CAST JODIE TURNER SMITH, JEFF BRIDGES, EVAN PETERS

DIRECTOR JOACHIM RØNNING

**ENGLISH** 

10<sup>™</sup> OCT'2025



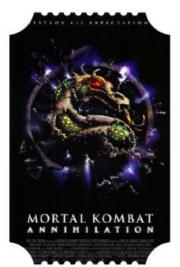
#### THE BLACK PHONE 2

CAST MASON THAMES, ETHAN HAWKE, JEREMY DAVIES

DIRECTOR SCOTT DERRICKSON

**ENGLISH** 

17TH OCT'2025



#### MORTAL KOMBAT 2 IMAX

CAST KARL URBAN, HIROYUKI SANADA TADANOBU ASANO

DIRECTOR SIMON MCQUOID

**ENGLISH** 

24TH OCT'2025



#### THAMA

CAST

AAYUSHMAN
KHURANA,
RASHMIKA
MANDANNA,
NAWAZUDDIN
SIDDIQUI

DIRECTOR ADITYA SARPOTDAR

HINDI

24TH OCT'2025



#### PREDATOR: BADLANDS

CAST ELLE FANNING

DIRECTOR DAN TRACHTENBERG

**ENGLISH** 

07TH NOV'2025



#### THE RUNNING MAN 4DX

CAST GLEN POWELL, KATY O'BRIAN, DANIEL EZRA

DIRECTOR EDGAR WRIGHT

**ENGLISH** 

07TH NOV'2025

26





#### **NOW YOU SEE** ME: NOW YOU DON'T

CAST ROSAMUND PIKE, MORGAN FREEMAN. DANIEL RADCLIFFE, MARK RUFFALO

DIRECTOR RUBEN FLEISCHER

**ENGLISH** 

14TH NOV'2025



#### **DE DE PYAAR** DE 2

CAST AJAY DEVGN. ANIL KAPOOR

DIRECTOR ANSHUL SHARMA

HINDI

14TH NOV'2025



#### WICKED: FOR GOOD IMAX, 4DX,

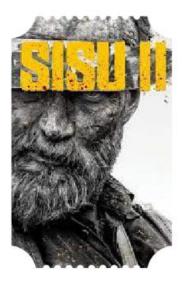
CAST JONATHAN BAILEY,

JEFF GOLDBLUM, ARIANA GRANDE

DIRECTOR JON M CHU

**ENGLISH** 

21<sup>ST</sup> NOV'2025



#### SISU SEQUEL

CAST STEPHEN LANG, RICHARD BRAKE, JORMA TOMMILA

DIRECTOR **JALMARI** HELANDER

ENGLISH, HINDI, TAMIL, TELUGU

21<sup>ST</sup> NOV'2025



N CINEMAS 2151 NOVEMBER 302

#### **120 BAHADUR**

CAST FARAN AKHTAR

DIRECTOR RAZNEESH GHAI

HINDI

21st NOV'2025



#### ZOOTOPIA IMAX

CAST

JASON BATEMAN, FORTUNE FEIMSTER. GINNIFER GOODWIN

DIRECTOR JARED BUSH, BYRON HOWARD

**ENGLISH** 

28TH NOV'2025



#### **TERE ISHK MEIN**

CAST DHANUSH, KRITI SANON

DIRECTOR AANAND L RAI

HINDI, TAMIL



#### **ARJUN USTARA**

CAST SHAHID KAPOOR, TRIPTI DIMRI, NANA PATEKAR, RANDEEP HOODA

DIRECTOR VISHAL BHARDWAJ

HINDI

05<sup>™</sup> DEC'2025





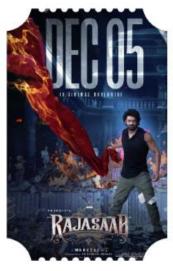
#### **DHURANDHAR**

CAST RANVEER SINGH, SANJAY DUTT, ARJUN RAMPAL

DIRECTOR ADITYA DHAR

HINDI

05<sup>™</sup> DEC'2025



#### THE RAJA SAAB

CAST PRABHAS

DIRECTOR MARUTHI DASARI

TELUGU, KANNADA, TAMIL, HINDI

05TH DEC'2025



#### AVATAR : FIRE AND ASH (3D) IMAX, ICE, SCREEN-X

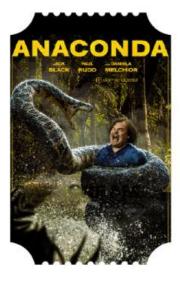
CAST ZOE SALDANA,

CLIFF CURTIS, OONA CHAPLIN

DIRECTOR JAMES CAMERON

ENGLISH/HINDI/TA MIL/TELEGU

19<sup>™</sup> DEC'2025



#### THE ANACONDA

CAST JACK BLACK, PAUL RUDD, DANIELA MELCHIOR

DIRECTOR TOM GORMICAN

**ENGLISH** 

25TH DEC'2025



#### ALPHA ICE

CAST ALIA BHATT, SHARVARI WAGH

DIRECTOR SHIV RAWAIL

HINDI

25TH DEC'2025



#### JANA NAYAGAN

CAST VIJAY, POOJA HEDGE, BOBBY DEOL

DIRECTOR H VINOTH

TAMIL

09TH JAN'2026



#### **BORDER 2**

CAST SUNNY DEOL, VARUN DHAWAN, DILJIT DOSANJH

DIRECTOR ANURAG SINGH

HINDI

23RD JAN'2026



#### TU MERI MAIN TERA, MAIN TERA TU MERI

CAST KARTIK ARYAN, ANANYA PANDEY

DIRECTOR SAMEER VIDWANS

HINDI

13<sup>™</sup> FEB'2026





#### **SCREAM 7**

CAST ISABEL MAY, MCKENNA GRACE, NEVE CAMPBELL

DIRECTOR KEVIN WILLIAMSON

**ENGLISH** 

27TH FEB'2026



#### MARDAANI 3

CAST RANI MUKHERJEE

DIRECTOR ABHIRAJ MINAWALA

HINDI

27TH FEB'2026



#### TOXIC

CAST YASH, KIARA ADVANI

DIRECTOR GEETHU MOHANDAS

KANNADA, HINDI



#### STREET FIGHTER

CAST JASON MOMOA, NOAH CENTINEO

DIRECTOR KITAO SAKURAI

**ENGLISH** 

20TH MAR'2026



#### **PROJECT HAIL** MARY

CAST RYAN GOSLING, MILANA, SANDRA HULLER

DIRECTOR PHIL LORD

**ENGLISH** 

20TH MAR'2026



#### **DHAMAAL 4**

CAST

AJAY DEVGN RITEISH DESHMUKH, ARSHAD WARSI, JAAVED JAAFERI

DIRECTOR INDRA KUMAR

HINDI

20TH MAR'2026



#### **LOVE AND WAR**

CAST

RANBIR KAPOOR. ALIA BHATT, VICKY KAUSHAL

DIRECTOR SANJAY LEELA BHANSALI

HINDI

20TH MAR'2026



#### PEDDI

CAST RAM CHARAN, DR.SHIVA RAJKUMAR. JANHVI KAPOOR

DIRECTOR **BUCHI BABU SANA** 

TELUGU, TAMIL, MALAYALAM, KANNADA, HINDI

27TH MAR'2026



# THANK YOU