

Ref. No.: GTPL/SE/2024

October 09, 2024

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 half year ended September 30, 2024

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, 2024.

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
Company Secretary and Compliance Officer

Encl: As above

GTPPL Hathway Limited

Q2 & H1 FY25 Results Update



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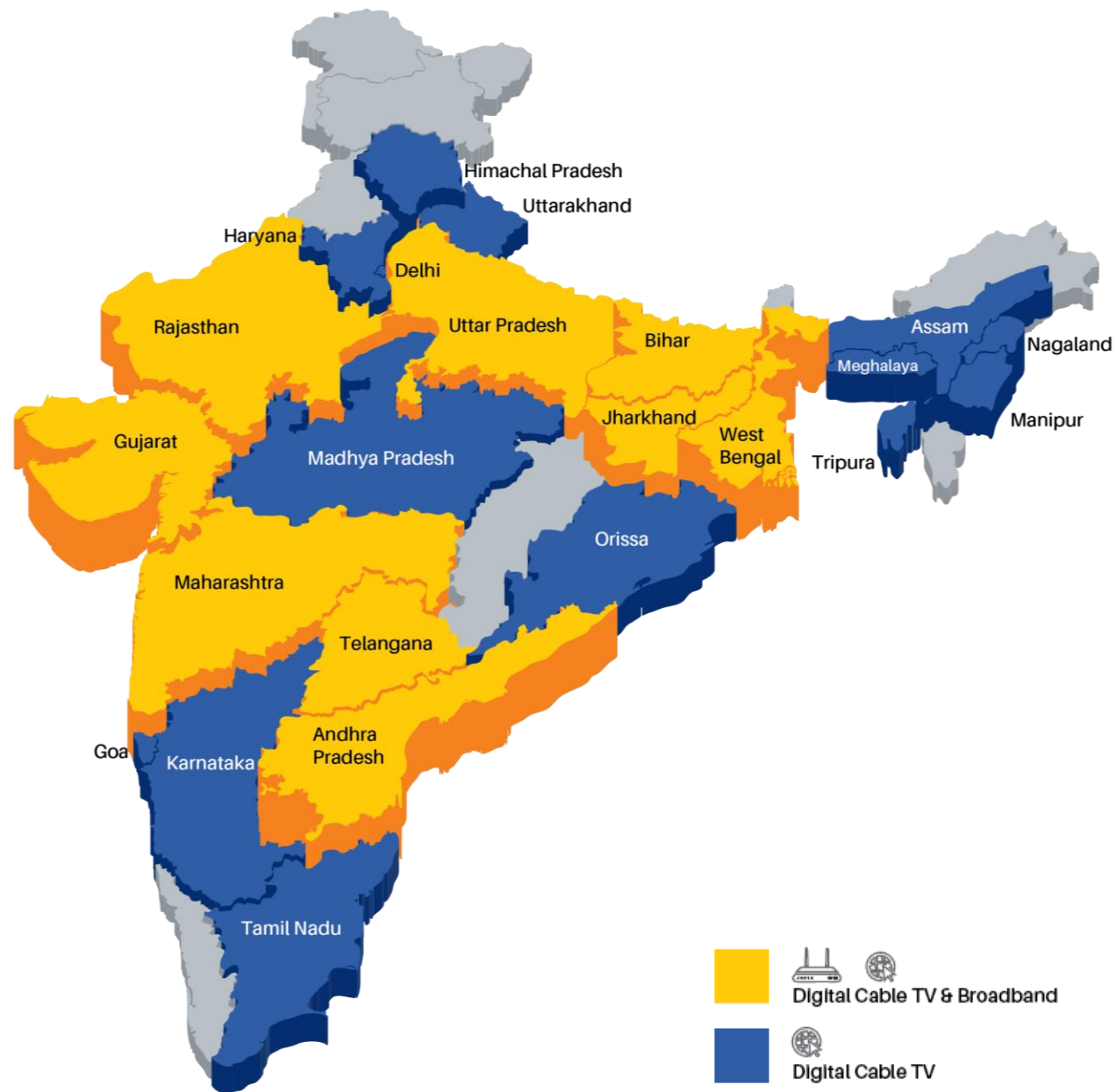




Company Overview




Leader Across Key Markets




- 01


Commenced Business in 2006


- 02


Footprint in 1,500+ towns across 23 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**
#Crossed 1 Mn Broadband subscribers in FY24

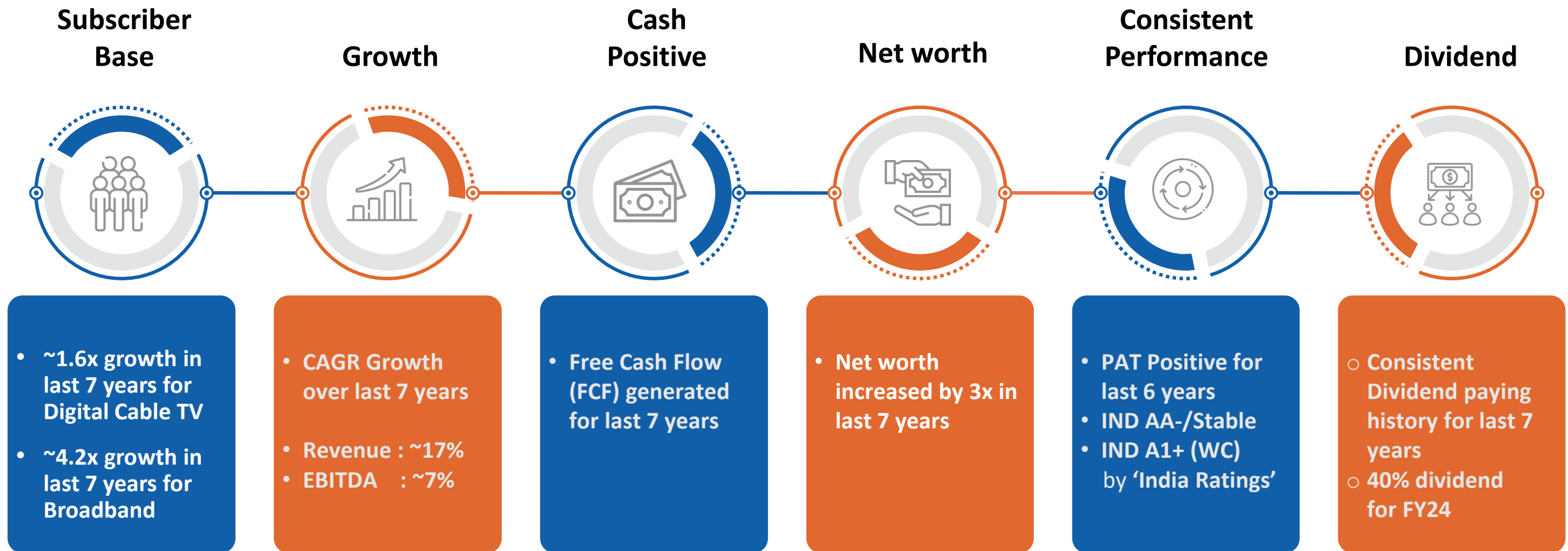

- 05

Significant presence in Maharashtra, AP, Telangana, Tamil Nadu & North-East
Footprint in Himachal Pradesh in Q4FY24



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

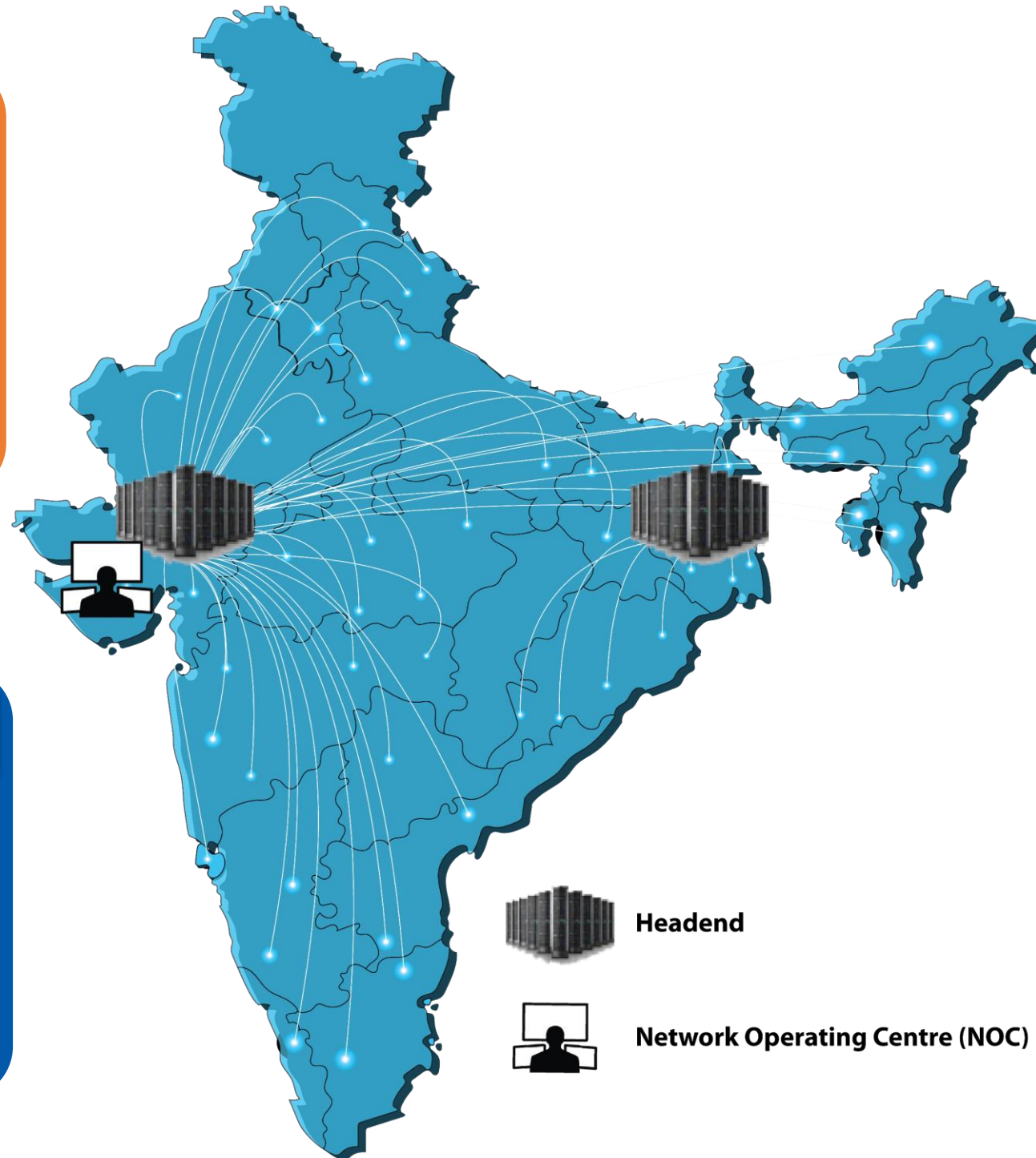
Value Creation Over The Period Of Time



Enhanced Infrastructure

Headend Infra

- Mother Headend in Ahmedabad, Gujarat
- 2nd Headend in Kolkata, West Bengal
- Distributing 940+ channels including 97+HD channels across India



NOC Infra

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

Fiber Infra

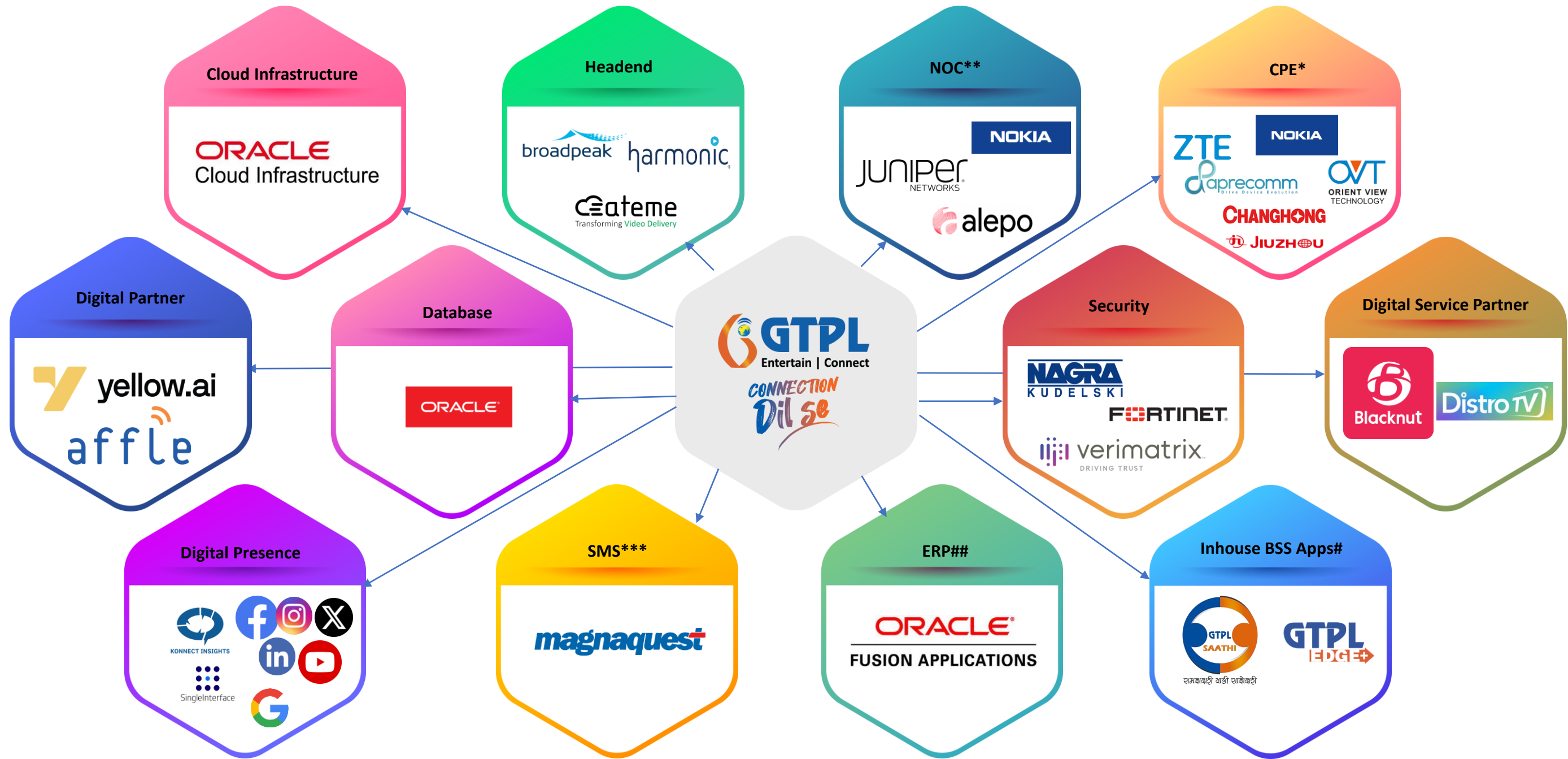
Vast Optical Fiber

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

Office Infra

326 offices across India to manage operations

Technology Partners – Best in Industry



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

Preferred Partner

01

- 43,000+ Business Partners
- 200+ Broadcasters
- 1,750+ Enterprise Clientele
- 30+ Government Projects

Pioneer Offerings

02

- 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

Leveraging Technology

03

- Strategic partnerships with industry leaders like Oracle, Nokia, Aprecomm, Nagra, Broadpeak and Harmonic
- Enables provision of fast, dependable, secure and cost-effective services to customers

All India Presence

04

- Covering 23 states
- Wide reach across consumption market
- Better Negotiation Power
- Commanding presence in key markets through deep coverage

Growth Initiatives

05

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

Huge Catalogue for Entertainment

06

- Extensive range of Digital Cable TV services with a seamless blend of OTT services
- 940+ Tv Channels, 97+ HD Channels, 130+ Company Owned and Operated Platform Services



We launched our new customer application “**GTPPL Buzz**” developed by Affle India Ltd., featuring a new and easy to navigate design and providing a direct touch point for our customers.

GTPPL Buzz is available for Android and iOS Mobile devices. The app contains a host of new features for all GTPPL customers including:

- **Live TV – Available on GTPPL Buzz**
 - Live TV channels available on mobile devices without any additional cost
 - Access of Free-to-Air linear channels for GTPPL Broadband subscribers too
- **Distro TV – Available on GTPPL Buzz**
 - DistroTV FAST service integrated in the app with earning opportunity on revenue share basis
 - GTPPL customers get access to a wide variety of Indian & International channels

Customer Application “GTPPL Buzz” and revamped GTPPL Website



- **Blacknut Cloud Games – Available on GTPPL Buzz & Website**
 - Subscription-based access to 500+ Games including AAA games
 - Games can be played on multiple devices with multiple profiles
- **GIVA – GTPPL’s AI Bot – Available on GTPPL Buzz & Website**
 - GTPPL Buzz also integrates GIVA, 24X7X365 chatbot that provides seamless self-service, support & customer assistance
 - Enables consumers to explore & buy various services offered by GTPPL



Revamped GTPPL Website – www.gtpl.net

- Designed with a modern, minimalistic, uncluttered and user-friendly UI
- Provides effortless navigation across sections.
- Customers can easily view, compare, and buy GTPPL services.



Industry Dynamics & Growth Strategy



Huge Runway for Growth

Total TV households that can be targeted

~180 Mn households*

GTPL Hathway's Cable Subscribers – 9.5 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:- **~75 Mn households***



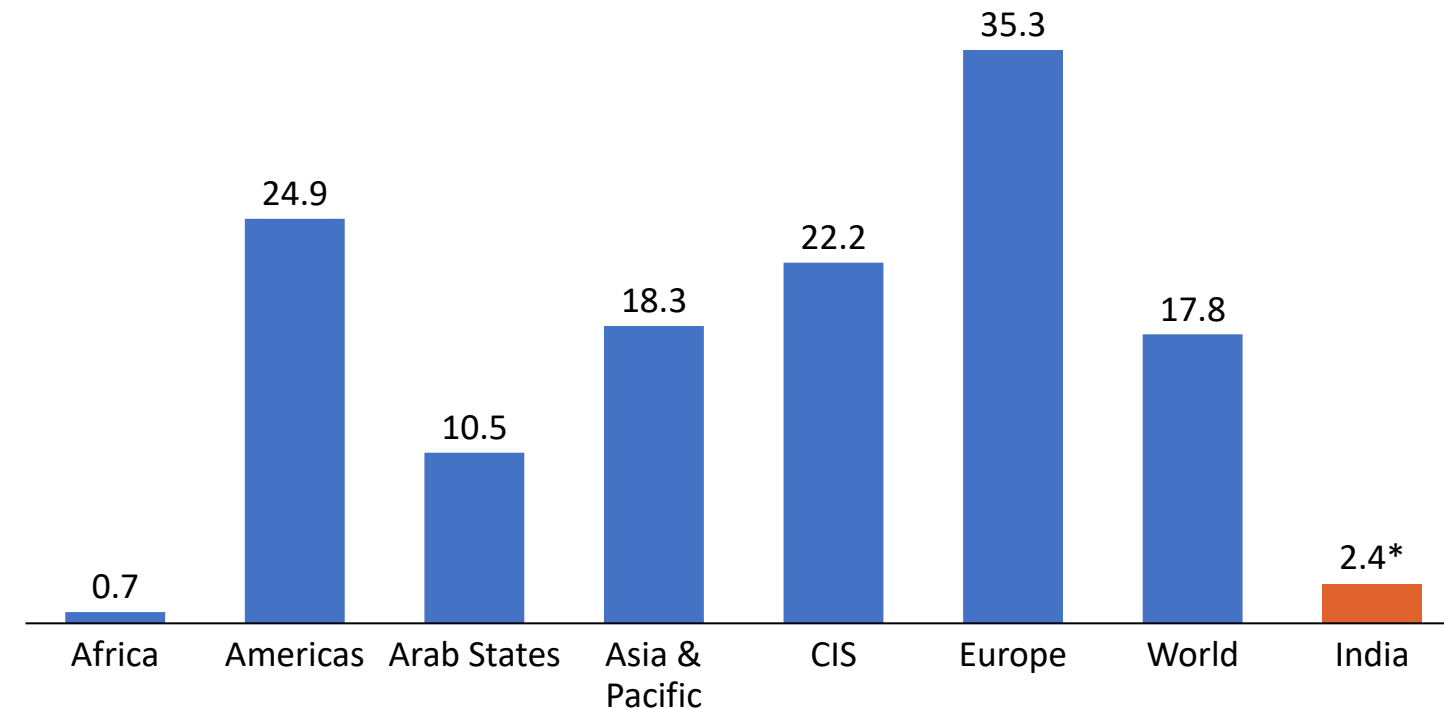
Industry dynamics favouring market consolidation in favour of organised players - MSO registration cancellation as well as shift from unorganised players presents opportunity for further **~40 Mn households***

Total broadband connections that can be targeted

~150 Mn households*

GTPL Hathway's Wireline Broadband Subscribers – 1.0+ Mn

■ Number of fixed broadband subscriptions per 100



India has one of the lowest fixed broadband penetration. July 2024 wired broadband subscribers stood at 41.98Mn. With ~325 Mn households in India – current subscribers represent **~13% penetration** which is far lower than penetration in developed nations of the world.

INORGANIC ACQUISITIONS



- ~40 Mn Cable TV Households catered by unorganized and small MSOs
- Opportunities to add and consolidate smaller/regional 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.

RURAL INDIA TO DRIVE GROWTH



- Increasing demand from rural India for TV sets will be a key contributor to CATV growth
- Regional content is preferred in rural India and especially in southern markets. Original ideas from the south, both scripted and non-scripted, will continue finding resonance across India. TV brands and characters will expand their reach more effectively with the world of social media

Multiple Growth Levers for Broadband Business



Acquiring Customers

- Increased Focus on B2B model
- Digital and broadband initiatives by 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



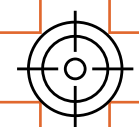
Staying Competitive

- 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 digital services

Higher data usage with increased adoption of Social Media & OTT



Push for digital growth and education all over 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.

Broadband Poised For High Growth

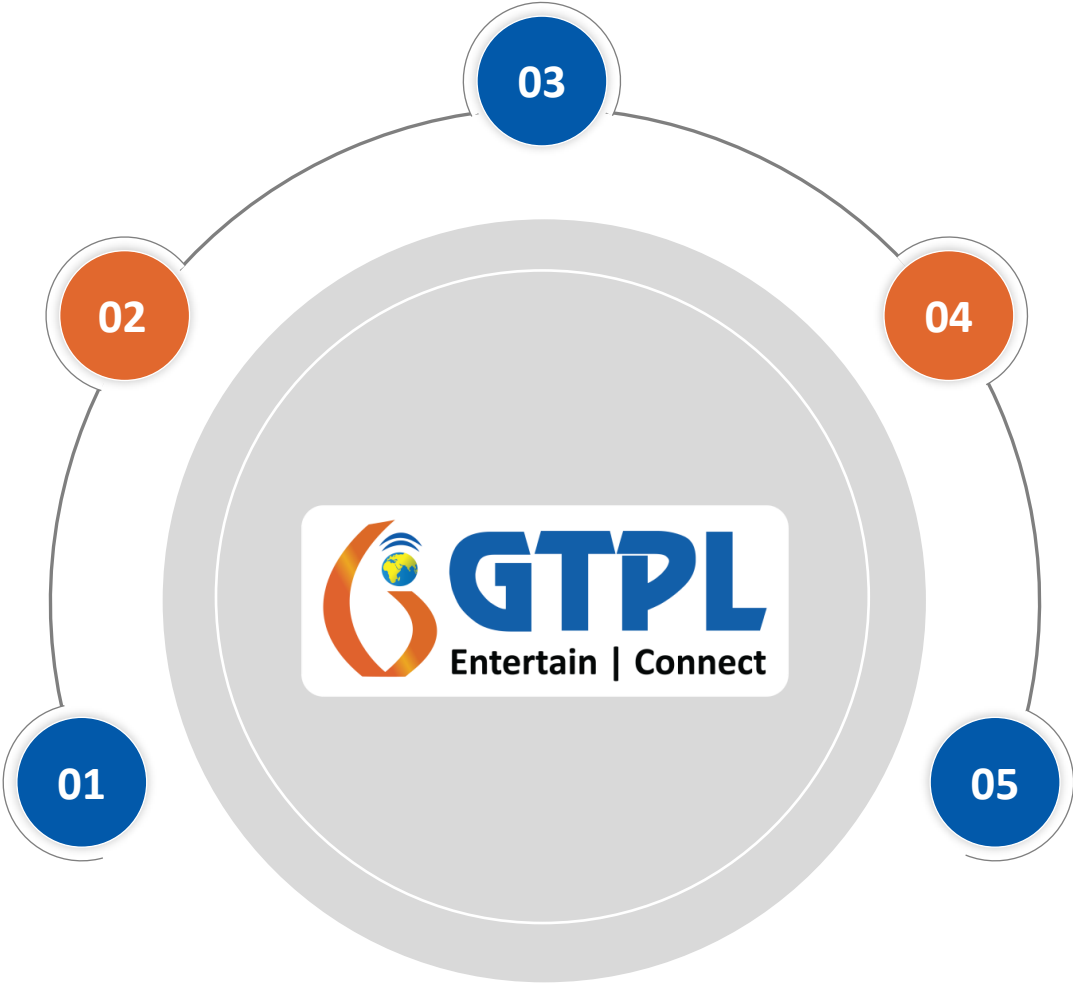
Broadband subscribers have grown by CAGR of **18%** over FY 20-24 and thus presents immense scope for growth. Broadband subscribers has already crossed a million mark and growth will be further accentuated by adopting B2B model.

Favourable Cable TV Landscape

Industry dynamics point towards market consolidation in favour of organised players for Cable TV. Inorganic Acquisition opportunities of smaller MSOs are present to readily boost customer base demonstrated by Metro Cast Networks Acquisition.

Established Player

GTPL Hathway continues to remain the largest MSO in the country and a leading player amongst the private wireline players. The company has a pan India presence, exhaustive catalogue and decades of experience in operating in a competitive industry.



Deploying Strategy For Bundling Of Services

Pioneer offerings such as GTPL Genie and TVKey Cloud will help bundle linear Cable TV offerings with a basket of OTT entertainment apps. Bundling of services from Cable TV and Broadband will help arrest subscriber churn and increase ARPU leading to higher margins.

Healthy Balance Sheet

A consistently free cash flow generating that fund capex requirements resulting in a Net Debt/Equity* of 0.12 in FY24. History of consistently paying dividend to shareholders. Operating in broadband through B2B model will enhance growth without significant capex requirement.

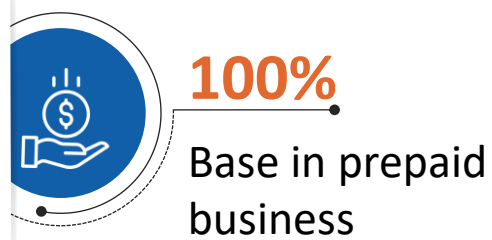
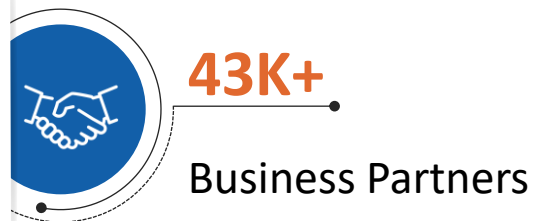
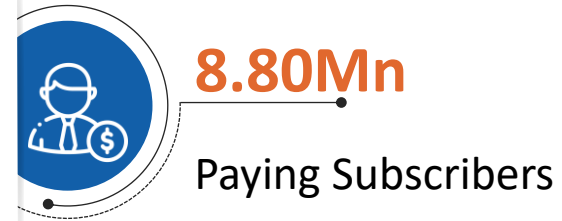
* Net Debt/Equity = (Total Borrowing + Total Lease Liabilities – Cash & Cash Equivalents (incl. Bank Balance))/Total Equity



Key Performance Indicators



Cable TV Business Performance



Increased Active Subscribers by **100K** Y-o-Y

Increased Paying Subscribers by **100K** Y-o-Y

Entered **4** new states in FY24 – Delhi, Haryana, Himachal Pradesh and Uttarakhand

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

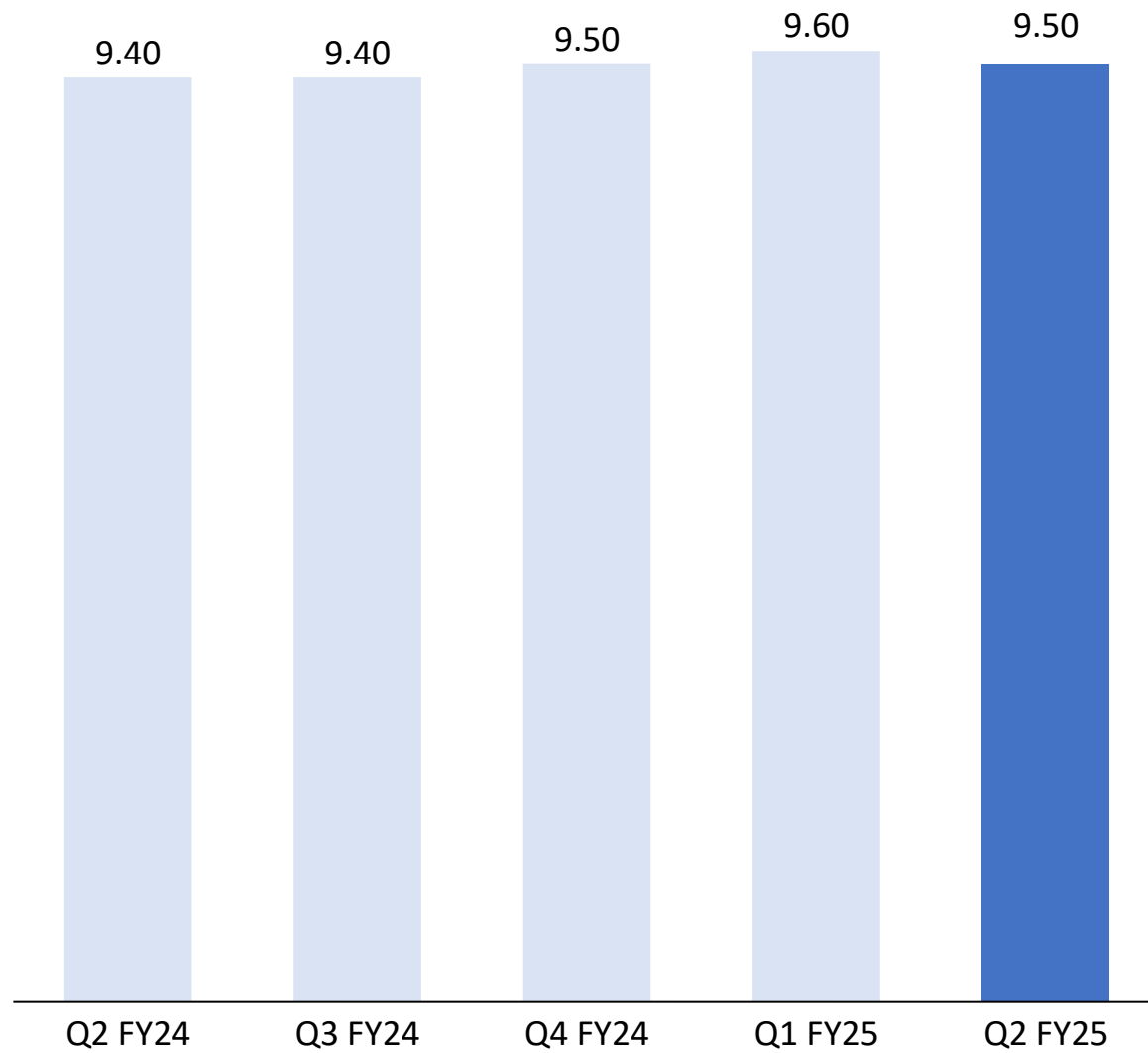
130+ Owned & Operated Channels

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

¹Active = Active during last 60 days

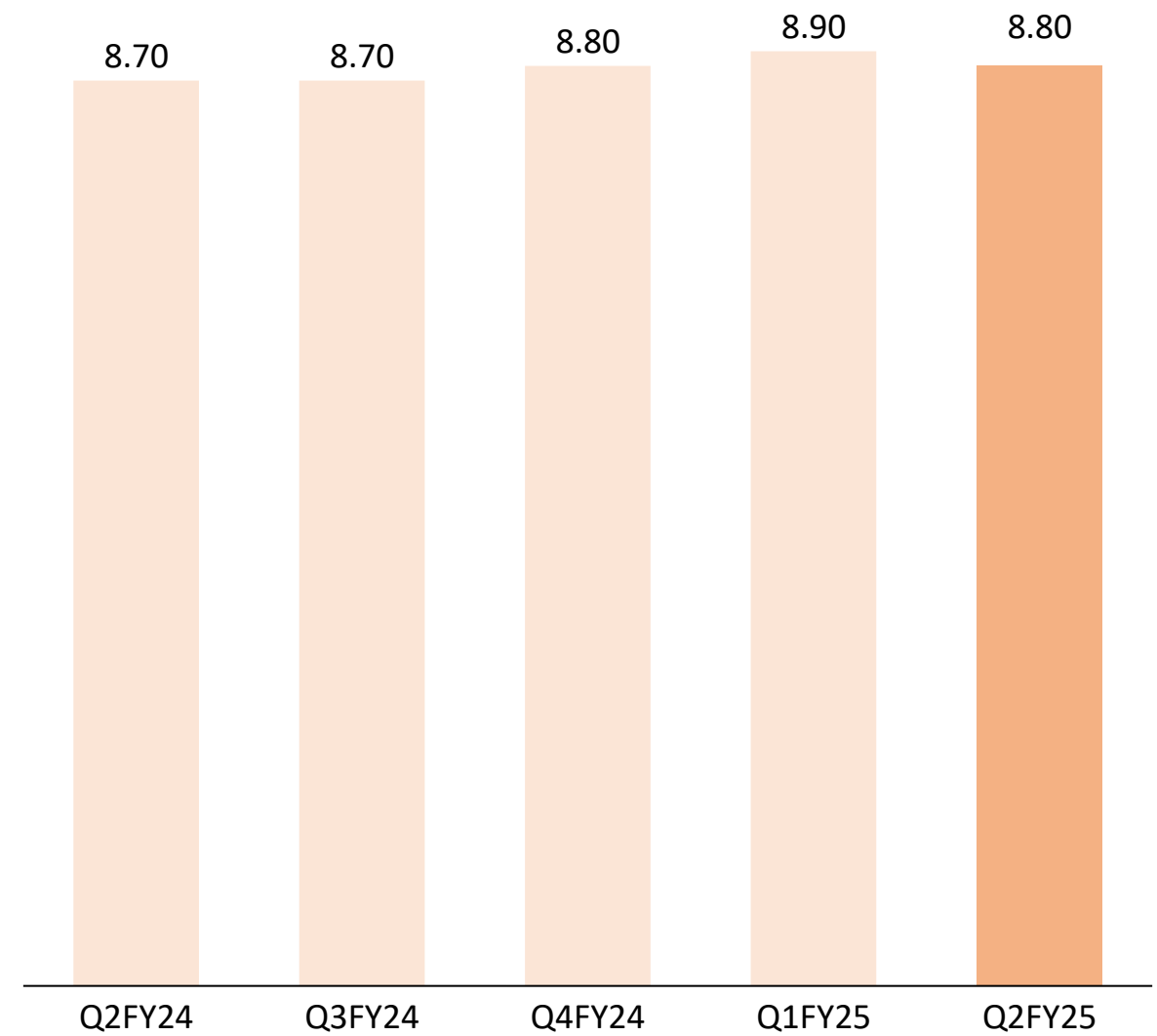
Cable TV Business: Consolidated*

Active¹ Subscribers (Mn)



Active Subscribers increased by 100K Y-o-Y

Paying Subscribers (Mn)



Active Subscribers increased by 100K 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 Performance



1040K

Active Subscribers



5.95Mn

Home-pass

Increase of **50K** (5%) Subscribers Y-o-Y

ARPU of **₹ 460** as of September 24; remained constant

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

5.95Mn Home Pass; **~75%** Home-pass available for FTTX conversion

Average Data Consumption per Customer stands at **350 GB / Month** for Q2 FY25; up by **13%** Y-o-Y



350GB

Average Data consumption per month



4%

Y-o-Y Revenue Growth



200 Mbps

Speed with unlimited data

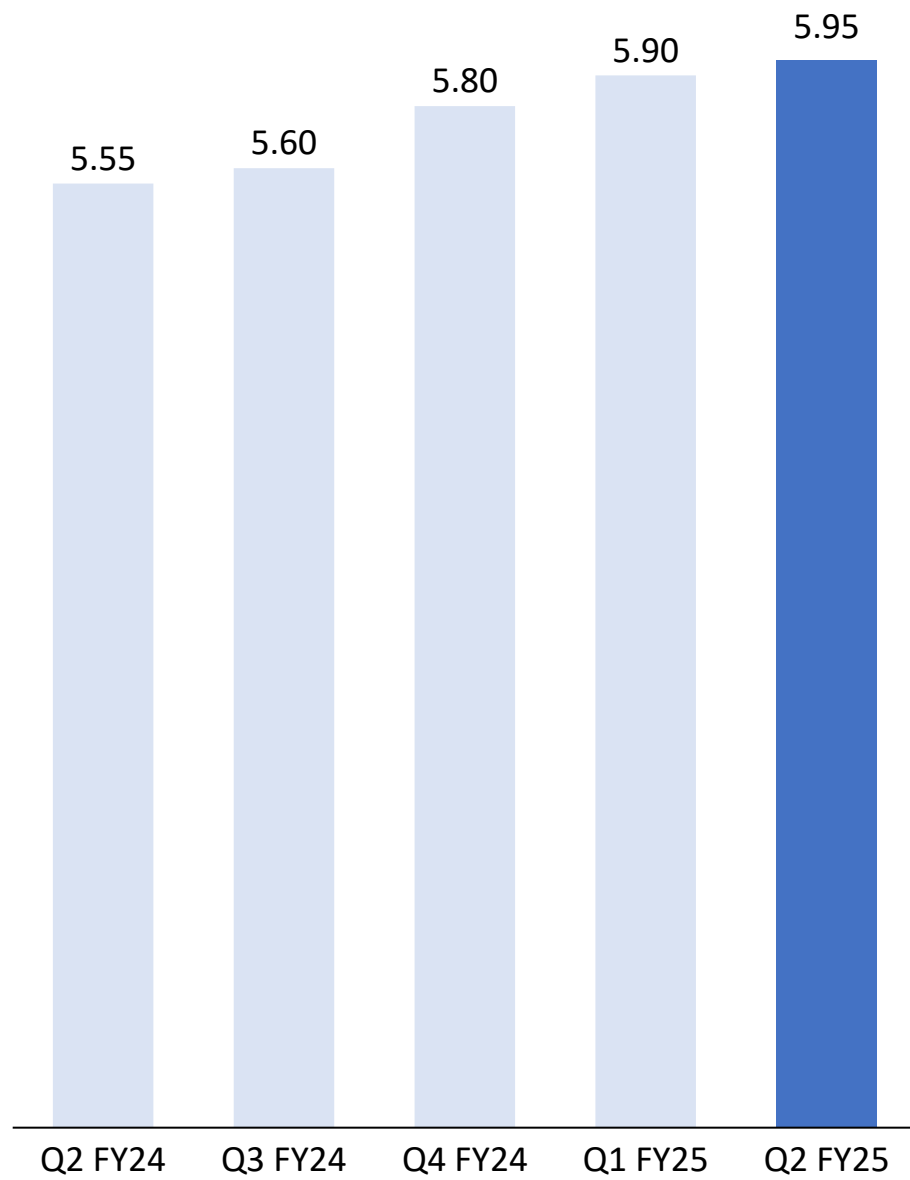


₹ 460/-

ARPU

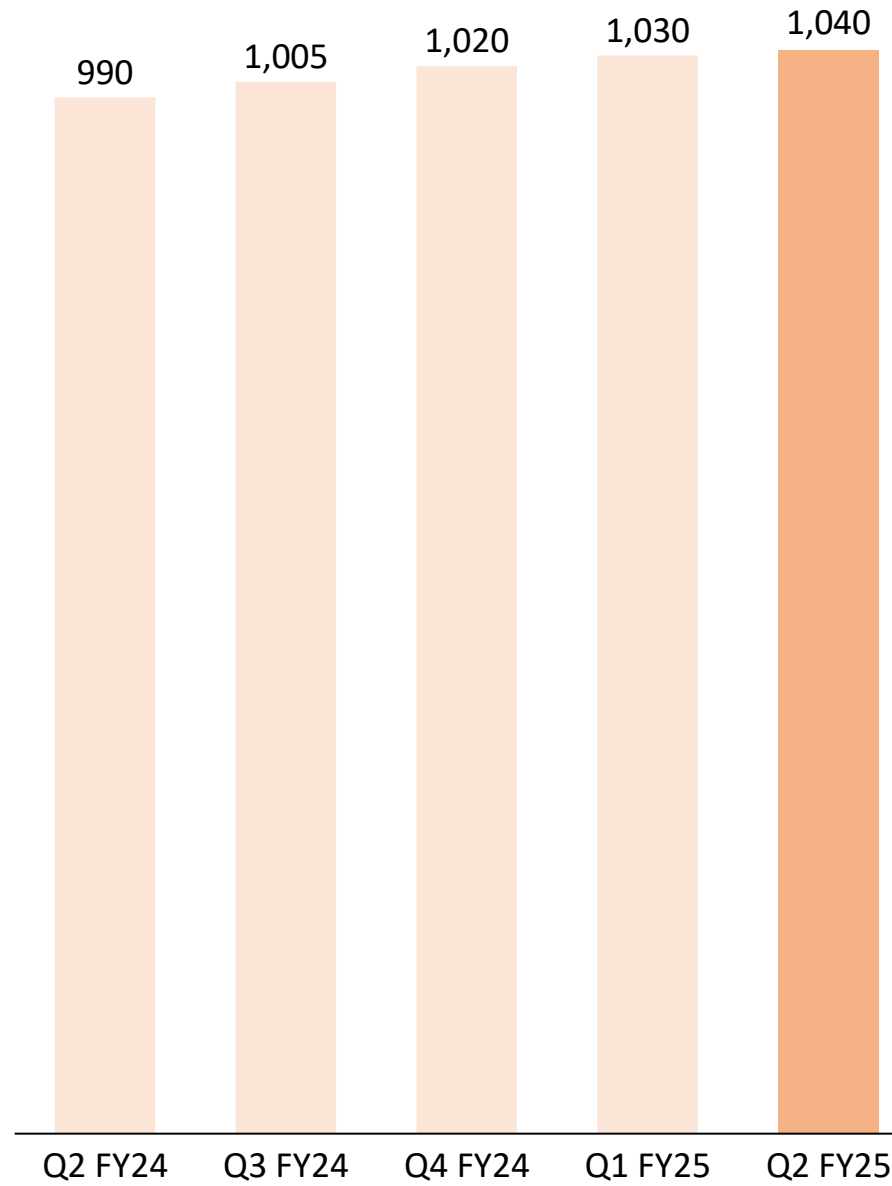
Broadband Business: Quarterly*

Homepass (Mn)



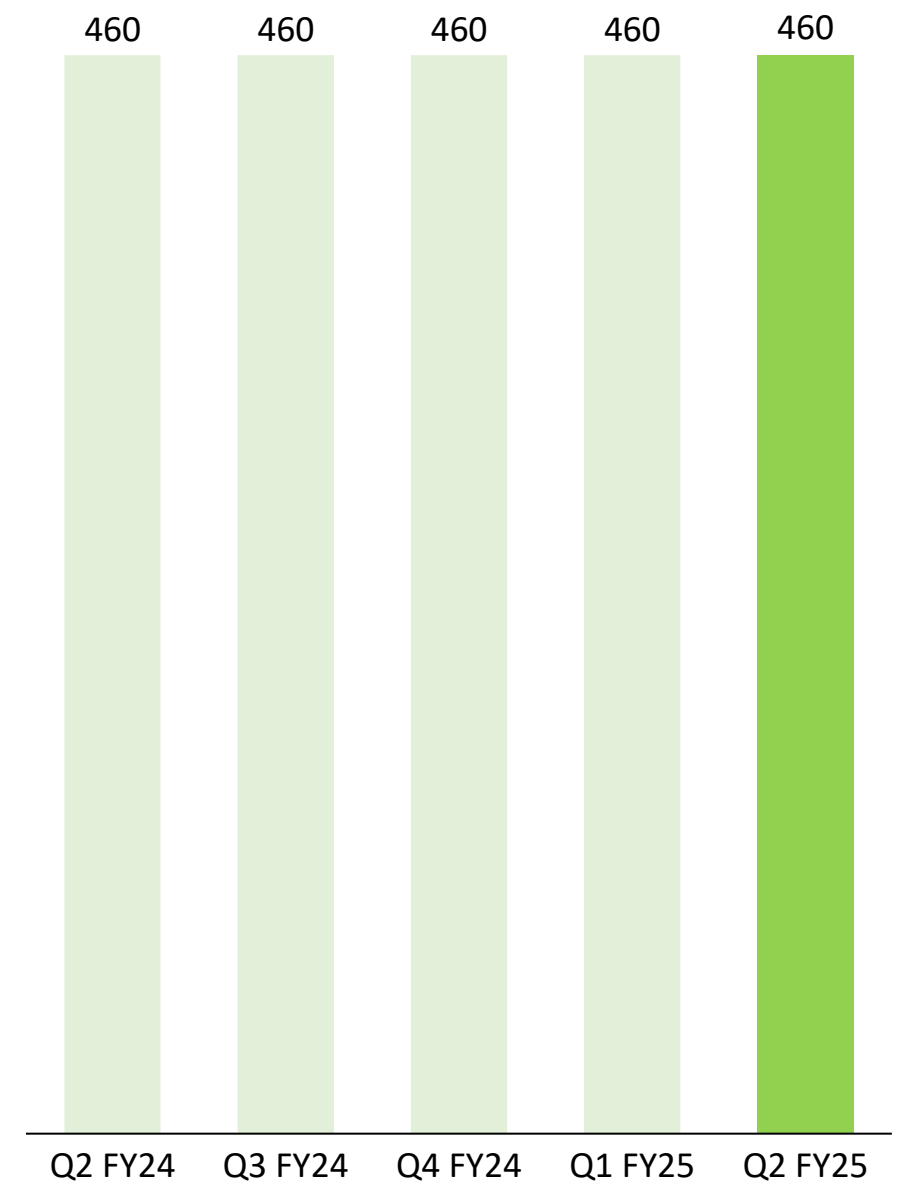
Homepass increased by 400K Y-o-Y

Active Subscriber's ('000)



ACB increased by 50K Y-o-Y

ARPU (₹) (Net of Taxes)



ARPU remained constant

* 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 9% Y-o-Y
ISP Revenue up by 4% Y-o-Y

2 EBITDA

EBITDA of ₹ 1,138 Mn in Q2 FY25
EBITDA Margin stands at 13.2% in Q2 FY25

3 PBT

PBT of ₹ 173 Mn in Q2 FY25

4 PAT

PAT of ₹ 129 Mn in Q2 FY25

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

Profit & Loss Statement: Consolidated *

Particulars	Q2 FY25	Q1 FY25	Q-o-Q%	Q2 FY24	Y-o-Y%	FY24
Revenue						
Subscription Income CATV	3,129	3,193	-2%	3,226	-3%	12,604
Broadband ISP	1,367	1,348	1%	1,317	4%	5,268
Placement / Carriage / Marketing Incentive	3,793	3,549	7%	2,967	28%	12,677
Project Income	-	-	0%	-	NA	416
Activation	43	42	1%	39	9%	174
Other Operating Income	224	301	-26%	243	-8%	985
Other Income	65	72	-10%	108	-40%	336
Total Income	8,620	8,506	1%	7,900	9%	32,460
Expenditure						
Pay Channel Cost	5,106	4,880	5%	4,340	18%	17,983
Employee Cost	414	396	5%	378	10%	1,545
Project Cost	-	-	NA	-	NA	414
Other Operating, Admin & Selling Exp.	1,962	2,025	-3%	1,831	7%	7,407
Total Expenditure	7,482	7,301	2%	6,549	14%	27,349
EBITDA	1,138	1,205	-5%	1,351	-16%	5,111
EBITDA %	13.2%	14.2%		17.1%		15.7%
Depreciation/Amortization	905	919	-2%	820	10%	3,372
Finance cost	60	66	-9%	50	21%	229
Profit before Tax & Exceptional item	173	220	-21%	481	-64%	1,510
Exceptional Items	-	-		-		-
Share of Profit/(Loss) from Associate and JVs	6	(2)		(2)		(2)
PBT	180	217	-17%	479	-62%	1,508
Tax	42	67		120		390
PAT before Other Comprehensive Income	137	150	-8%	359	-62%	1,118
Share of Non Controlling Interest	(10)	(7)		(17)		(48)
Other Comprehensive Income	1	(0)		2		(1)
PAT	129	143	-9%	344	-62%	1,069

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

Analysis on Operating Margin : Consolidated *

Particulars	Q2 FY25	Q1 FY25	Q-o-Q%	Q2 FY24	Y-o-Y%	FY24
Revenue						
Subscription Income CATV	3,129	3,193	-2%	3,226	-3%	12,604
Broadband ISP	1,367	1,348	1%	1,317	4%	5,268
Other Operating Income	224	301	-26%	243	-8%	985
Total Income	4,720	4,842	-3%	4,786	-1%	18,857
Expenditure						
Net Pay Channel Cost	1,313	1,331	-1%	1,373	-4%	5,305
<i>Pay Channel Cost</i>	5,106	4,880	5%	4,340	18%	17,983
<i>Placement / Carriage / Marketing Incentive</i>	(3,793)	(3,549)	7%	(2,967)	28%	(12,677)
Employee Cost	414	396	5%	378	10%	1,545
Other Operating, Admin & Selling Exp.	1,962	2,025	-3%	1,831	7%	7,407
Total Expenditure	3,689	3,752	-2%	3,582	3%	14,258
Operating EBITDA	1,031	1,090	-5%	1,204	-14%	4,599
Operating EBITDA %	22%	23%		25%		24%
Activation	43	42	1%	39	9%	174
Project Margin (Income - Cost)	-	-		-		3
Other Non Operating Income	65	72	-10%	108	-40%	336
Published EBITDA	1,138	1,205	-5%	1,351	-16%	5,111

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

Balance Sheet: Consolidated *

Liabilities	As on 30th Sep 2024	As on 31st Mar 2024
Equity		
Equity Share Capital	1,125	1,125
Other Equity	11,614	11,742
Total Equity	12,739	12,867
Non-Current Liabilities		
Financial Liabilities		
Borrowings	509	584
Other Financial Liabilities	360	460
Deferred Tax Liabilities	763	754
Other Non-Current Liabilities	263	253
Total Non-Current Liabilities	1,895	2,051
Current Liabilities		
Financial Liabilities		
Borrowings	2,178	1,700
Trade Payables	10,908	7,154
Other Financial Liabilities	3,242	2,924
Other current liabilities (Deferred Rev.)	3,565	3,839
Current Tax liability(Net)	11	11
Total Current Liabilities	19,904	15,628
Total Liabilities	34,538	30,545

❖ Increase in Trade Payables by ₹ 3,754 Mn primarily due to Broadcasters payables

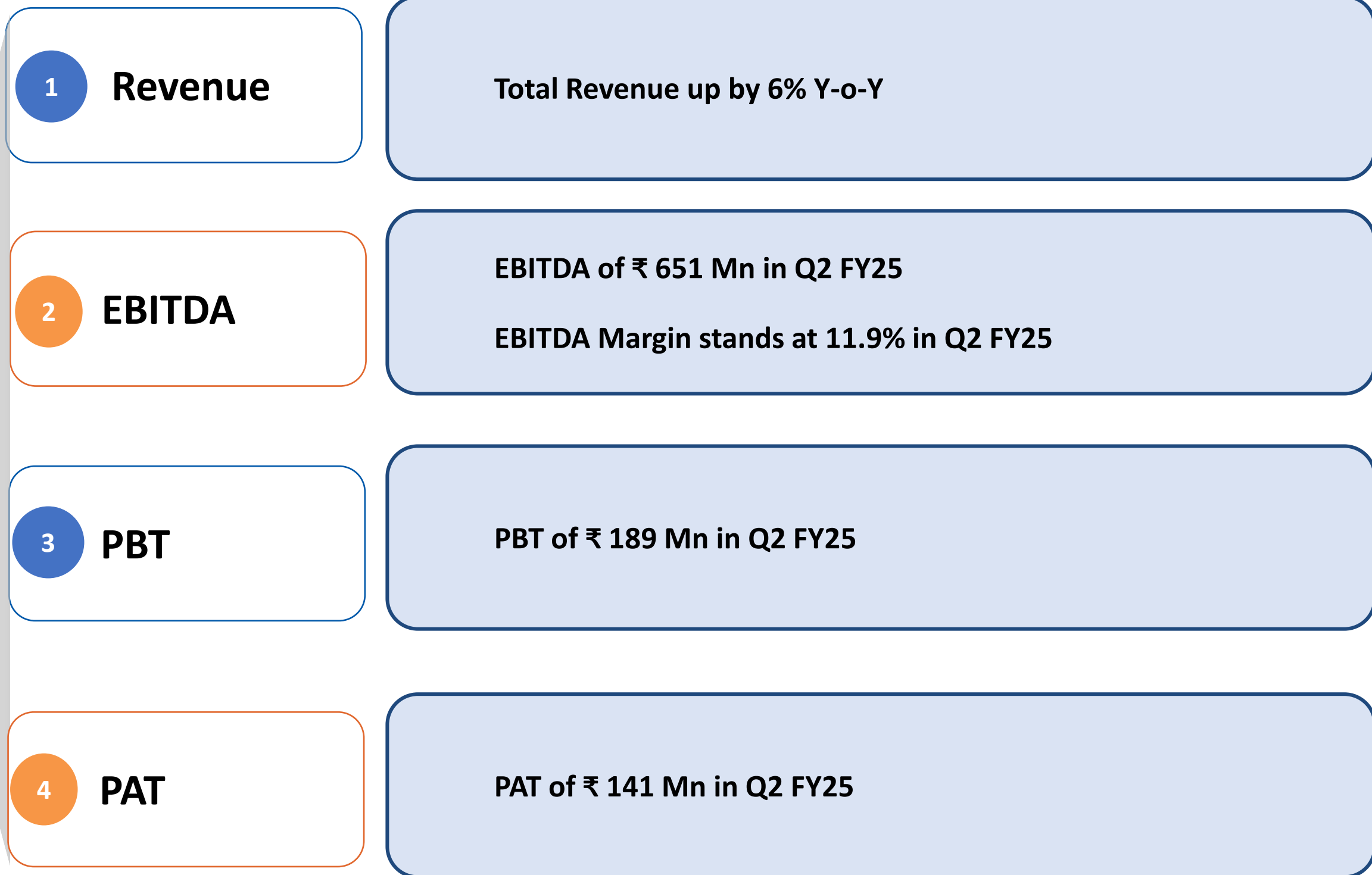
Assets	As on 30th Sep 2024	As on 31st Mar 2024
Non-Current Assets		
Fixed Assets	21,233	21,177
Financial Assets		
Investments	118	106
Other Financial Assets	369	399
Deferred Tax Assets	314	352
Other non-current Assets	1,235	1,221
Total Non-Current Assets	23,269	23,255
Current Assets		
Inventories	297	244
Financial Assets		
Trade Receivables	7,873	4,373
Cash, Cash equivalents & Bank Balances	1,372	1,488
Other Financials Assets	262	316
Current Tax Assets (Net)	62	43
Other Current Assets	1,403	827
Total Current Assets	11,269	7,290
Total Assets	34,538	30,545

❖ Increase in Trade Receivables by ₹ 3,501 Mn mainly due to Broadcasters Receivables



Standalone Financials





Profit & Loss Statement : Standalone

Particulars	Q2 FY25	Q1 FY25	Q-o-Q%	Q2 FY24	Y-o-Y%	FY24
Revenue						
Subscription Income CATV	2,207	2,249	-2%	2,237	-1%	8,886
Placement / Carriage / Marketing Incentive	2,881	2,726	6%	2,445	18%	10,069
Activation	16	24	-35%	28	-43%	110
Other Operating Income	287	361	-20%	304	-6%	1,221
Other Income	62	73	-15%	106	-42%	324
Total Income	5,452	5,433	0%	5,121	6%	20,610
Expenditure						
Pay Channel Cost	3,684	3,534	4%	3,282	12%	13,318
Employee Cost	199	194	2%	180	11%	748
Other Operating, Admin & Selling Exp.	919	1,014	-9%	894	3%	3,657
Total Expenditure	4,801	4,743	1%	4,355	10%	17,722
EBITDA	651	690	-6%	765	-15%	2,887
EBITDA %	11.9%	12.7%		14.9%		14.0%
Depreciation/Amortization	421	437	-3%	398	6%	1,628
Finance cost	41	50	-19%	37	11%	158
Profit before Tax & Exceptional item	189	204	-7%	330	-43%	1,101
Exceptional Items	-	-		-		(60)
PBT	189	204	-7%	330	-43%	1,042
Tax	49	53		87		279
PAT before Other Comprehensive Income	140	150	-7%	243	-43%	762
Add/(Less) Other Comprehensive Income	1	(0)		0		(1)
PAT	141	150	-6%	243	-42%	761

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

Analysis on Operating Margin : Standalone *

Particulars	Q2 FY25	Q1 FY25	Q-o-Q%	Q2 FY24	Y-o-Y%	FY24
Revenue						
Subscription Income CATV	2,207	2,249	-2%	2,237	-1%	8,886
Other Operating Income	287	361	-20%	304	-6%	1,221
Total Income	2,494	2,609	-4%	2,541	-2%	10,106
Expenditure						
Net Pay Channel Cost	803	808	-1%	836	-4%	3,249
<i>Pay Channel Cost</i>	3,684	3,534	4%	3,282	12%	13,318
<i>Placement / Carriage / Marketing Incentive</i>	(2,881)	(2,726)	6%	(2,445)	18%	(10,069)
Employee Cost	199	194	2%	180	11%	748
Other Operating, Admin & Selling Exp.	919	1,014	-9%	894	3%	3,657
Total Expenditure	1,920	2,016	-5%	1,910	1%	7,653
Operating EBITDA	573	593	-3%	631	-9%	2,453
Operating EBITDA %	23%	23%		25%		24%
Activation	16	24	-35%	28	-43%	110
Other Non Operating Income	62	73	-15%	106	-42%	324
Published EBITDA	651	690	-6%	765	-15%	2,887

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


Balance Sheet: Standalone *

Liabilities	As on 30th Sep 2024	As on 31st Mar 2024
Equity		
Equity Share Capital	1,125	1,125
Other Equity	7,758	7,917
Total Equity	8,883	9,042
Non-Current Liabilities		
Financial Liabilities		
Borrowings	405	425
Other Non-Current Liabilities	366	447
Total Non-Current Liabilities	771	873
Current Liabilities		
Financial Liabilities		
Borrowings	1,368	1,086
Trade Payables	7,619	4,818
Other Financial Liabilities	2,531	2,320
Other current liabilities	974	1,115
Total Current Liabilities	12,492	9,339
Total Liabilities	22,145	19,253

❖ Increase in Trade Payables by ₹ 2,801 Mn primarily due to Broadcasters payables


Assets	As on 30th Sep 2024	As on 31st Mar 2024
Non-Current Assets		
Fixed Assets	8,789	8,747
Financial Assets		
Investments	2,400	2,402
Loans & Other Financial Assets	2,428	2,381
Deferred Tax assets	42	90
Other non-current Assets	852	889
Total Non-Current Assets	14,511	14,509
Current Assets		
Inventories	267	232
Financial Assets		
Trade Receivables	5,913	3,367
Cash, Cash equivalents & Bank Balances	490	648
Loans & Other Financial Assets	135	47
Other Current Assets	829	450
Total Current Assets	7,634	4,744
Total Assets	22,145	19,253

❖ Increase in Trade Receivables by ₹ 2,546 Mn mainly due to Broadcasters Receivables



EMKAY GLOBAL FINANCIAL SERVICES LTD.
is pleased to invite you for a conference call to discuss the Q2FY25 results with

Mr. Anirudhsinh Jadeja – Promoter & Managing Director
Mr. Piyush Pankaj – Business Head B2B (CATV & Broadband) & Chief Strategy Officer
Mr. Saurav Banerjee – Chief Financial Officer





GTPL Hathway Limited
On Thursday, October 10, 2024 at 4:00 PM (IST)

[Pre-register to avoid wait time and Express Join with DiamondPass™](#)

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