

Dated : 14<sup>th</sup> August 2018

National Stock Exchange of India Limited  
Exchange Plaza  
Bandra Kurla Complex, Bandra (E)  
Mumbai 400 051  
Scrip: PROZONINTU

BSE Limited  
Listing Department  
P.J. Towers, Dalal Street, Fort  
Mumbai 400 001  
Scrip: 534675

Dear Sir,

**Subject : Intimation of Conference Call and Presentation to be shared with Investors/ Analysts - Q1 FY 2018-19.**

Pursuant to Reg. 30(6) read with Para A of Part A of Schedule III of the SEBI (LODR) Regulations 2015, please take note of the schedule of Investors/Analysts conference call to be conducted by the Company, as per the details given below:

Schedule of analyst/ investor interaction/ meeting			
Date	Type of Meeting	Location	Type of meeting
16 <sup>th</sup> August 2018	Investors/Analysts Conference Call	Mumbai	Conference Call

Further we enclose herewith a copy of Invitation letter and Investor Presentation to be shared with Analysts/Institutional Investors for discussion in the conference call. In Compliance with the Reg. 46(2)(o) of SEBI (LODR) Regulation 2015, the said Presentation shall also be disclosed on the website of the Company at i.e. [www.prozoneintu.com](http://www.prozoneintu.com).

Kindly note that the above schedule of meeting is subject to change in case of any exigency on the part of analysts/investors or the Company.

Thanking you,

Yours faithfully,  
For Prozone Intu Properties Limited

  
Ajayendra P. Jain  
CS & Chief Compliance Officer



Encl.: as above



You are cordially invited to the  
**Conference Call**  
of  
**Prozone Intu Properties Limited**  
to discuss the  
**Q1 FY19 Results & Business Outlook**

Represented by:	
<b>Mr. Nikhil Chaturvedi</b>	Managing Director
<b>Mr. Bipin Gurnani</b>	President
<b>Mr. Anurag Garg</b>	Chief Financial Officer

Conference Dial-In Number	
Primary Number	+91 22 6280 1116 / 7115 8017
Local Access Number	+91 22 70456 71221 (Ahmedabad, Bangalore, Chandigarh, Chennai, Gurgaon (NCR), Hyderabad, Kochi/Cochin, Kolkata, Lucknow, Pune)

International Toll Free Number	USA: 1 866 746 2133 UK: 0 808 101 1573 Singapore: 800 101 2045 Hong Kong: 800 964 448
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**Date: Thursday, 16<sup>th</sup> August 2018**

**Time: 2.30 PM (I.S.T)**

**RSVP:**

**Pranav Joshi**

Research Associate

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E-mail: [pranavj@dolatcapital.com](mailto:pranavj@dolatcapital.com)

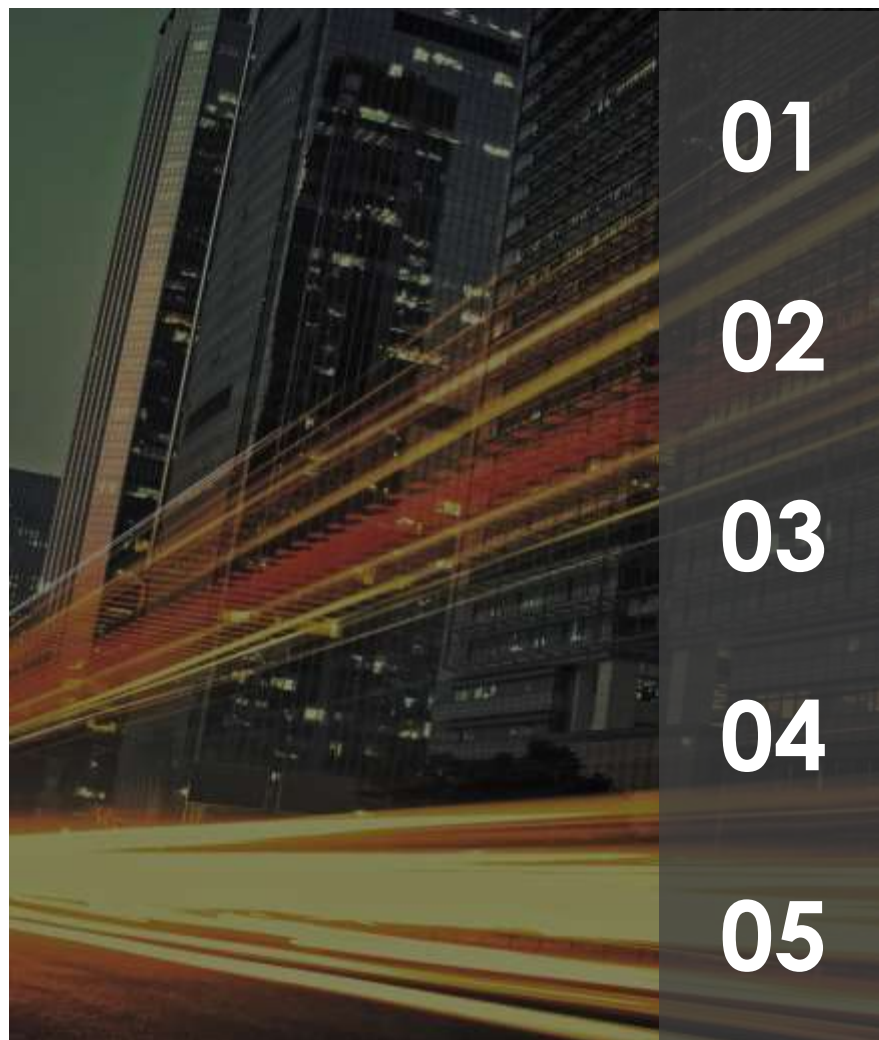
Upward  
And Forward

prozone  
intu 

Q1 FY19 RESULTS  
UPDATE PRESENTATION  
August 2018



PROZONE INTU PROPERTIES LIMITED



01

Sector Update

02

Quarterly Business Update

03

Financial Results

04

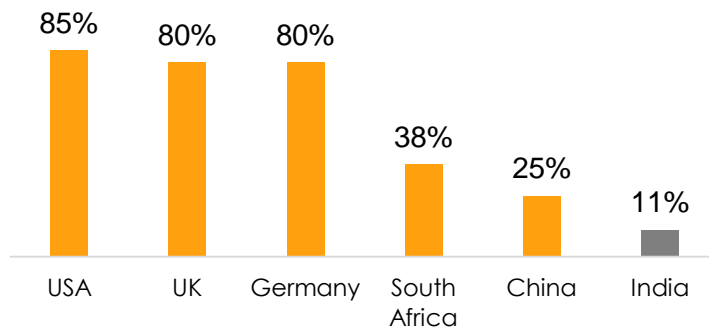
Asset Snapshot

05

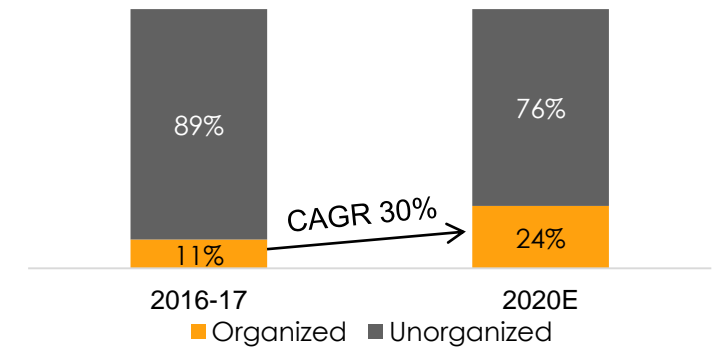
Annexure



## Organised Retail Penetration



## Transition to organised retail

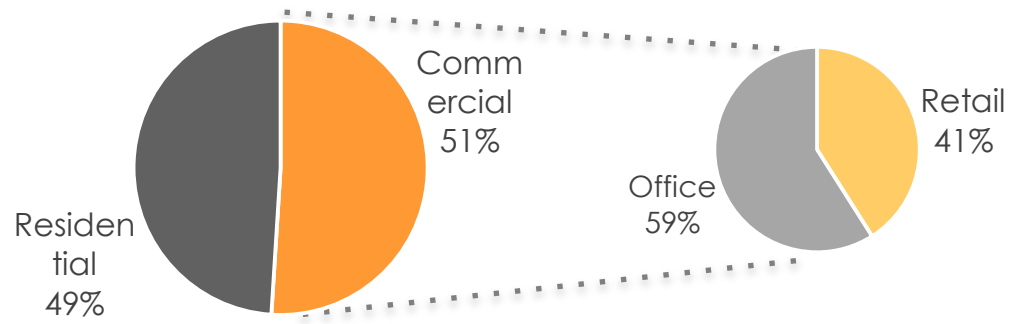


### Key Factors driving this growth include:

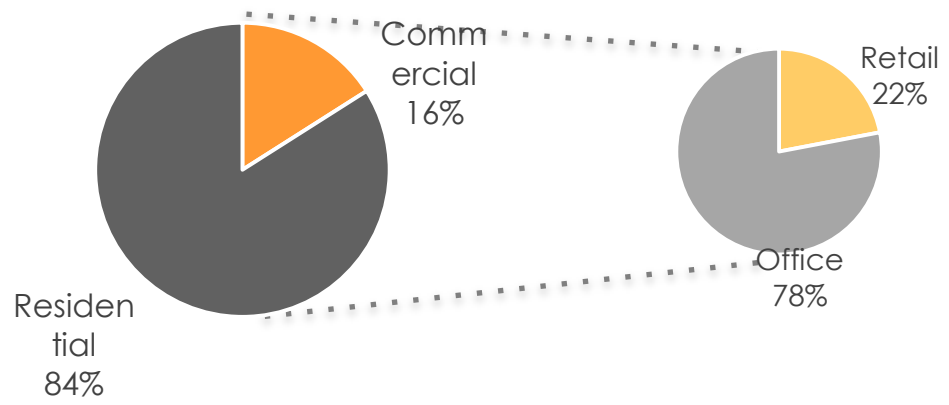
- ❑ Easing consumer credit and increase in quality products
- ❑ Rising incomes & increasing purchasing power
- ❑ Changing consumer preferences coupled with growing urbanisation
- ❑ Increase in number of high net worth individuals (HNIs)

# RETAIL DEVELOPMENT SHARE HAS SHRUNK AS SMALLER, INEXPERIENCED PLAYERS HAVE EXITED

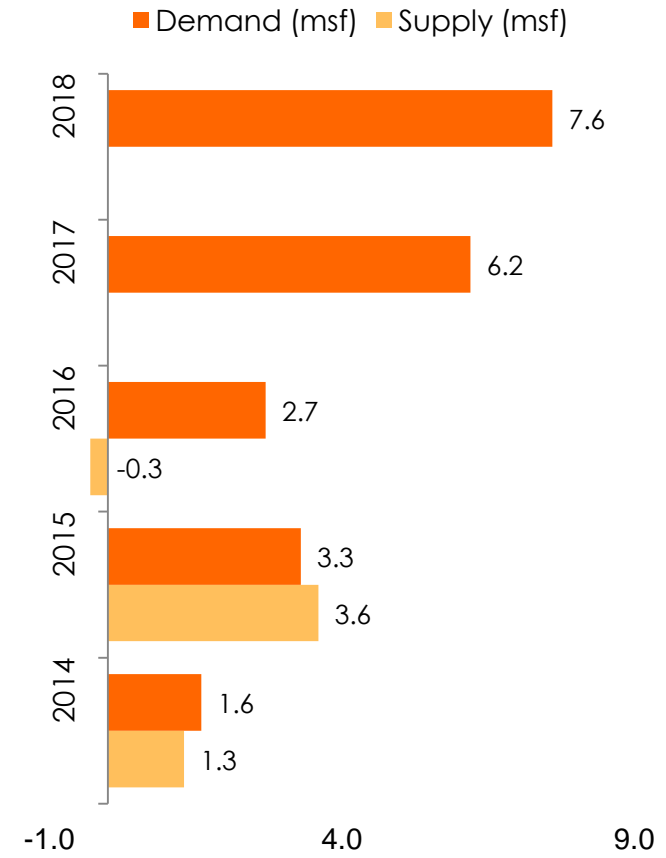
## 2008



## 2018



## Demand – Supply Gap







### IND AS 115 – ( Revenue from contracts with customers )

- Ministry of Corporate Affairs (MCA) vide notification dated March 28, 2018 has amended The Companies (Indian Accounting Standards) Amendment Rules, 2018 to introduce 'Ind AS 115 – Revenue from Contracts with Customers'.
- Ind AS 115 has become effective for accounting periods beginning on or after 1 April 2018.
- Earlier guidance note on accounting of Real estate transaction issued by Institute of chartered Accountants of India ( ICAI ) permitting revenue recognition as per POCCM is withdrawn for companies to whom IND AS is applicable
- Ind AS 115 is based on a core principle that requires an entity to recognise revenue:
  - In a manner that depicts the transfer of goods or services to customers
  - At an amount that reflects the consideration the entity expects to be entitled to in exchange for those goods or services.
- As per IND AS 115 ,revenue can be recognised either **over period of time** ( similar to POCCM ) or **at a point of time** ( on completion of contract ) based on assessment of contracts with customers and relevant law
- Based on management assessment , it is concluded that company shall recognise revenue **at point of time** ( completion of contract )
- Accordingly revenue from uncompleted contracts as on 01st April 18 will be recognised on completion of contract /project and margin already recognised till 31st March 18 net of deferred tax is debited to retained earnings as per modified retrospective approach



01

- Aurangabad and Coimbatore mall leased out space currently stands at 80% and 89% respectively, annuity income to increase significantly with ramp-up of Coimbatore mall

02

- Coimbatore Mall awarded as “Most admired Shopping Centre Launch of the Year (Non Metro – South)”
- Upon finalisation, brands under discussion will take Coimbatore lease area above 90%

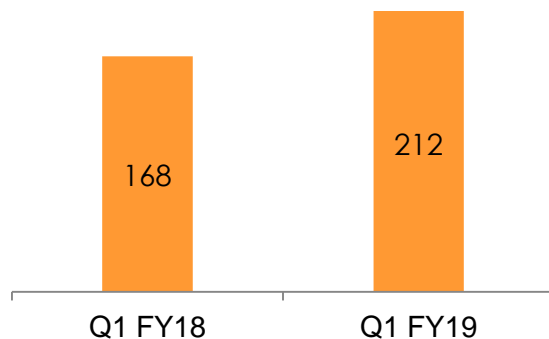
03

- Aurangabad: International Anchor Brands **H&M and Marks & Spencer** commenced operations
- Opening of additional National Anchor Brand **Home Town** and several inline stores to improve Revenue

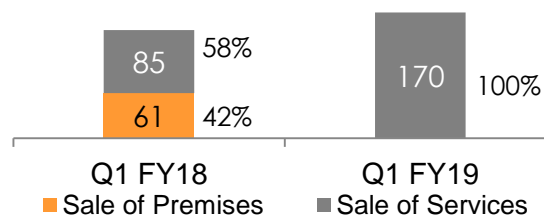
04

- Company has set up Alternate Investment Fund and received necessary approval from SEBI for AIF formation .company is evaluating acquisition opportunities and shall invite subscription once deal is finalised

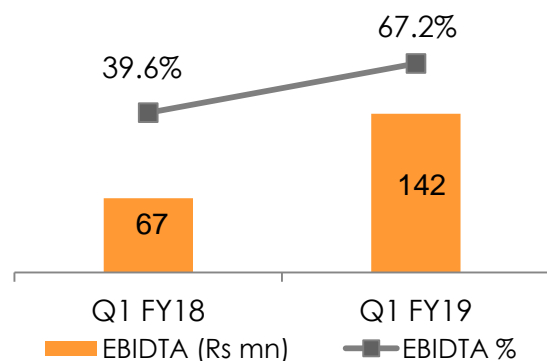
## Revenues (Rs. Mn)\*



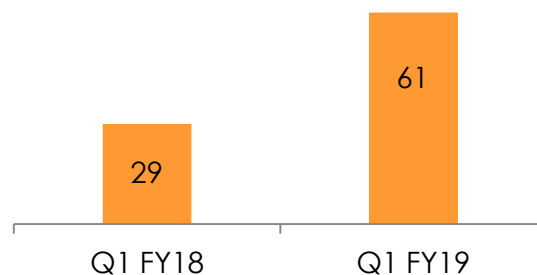
## Revenues Mix (Rs. Mn)#



## EBIDTA & EBIDTA Margin\*



## Cash PAT (%)



- ❑ **Strong growth of revenue continues**, revenue up 26% YoY despite no contribution from sale of premises considered in Q1 FY2019
- ❑ **Strong EBIDTA** of Rs 142 mn with EBITDA margin of 67.2%
- ❑ **Revenue mix moving towards sale of services** as we moved towards project completion method under IND AS – 115#
- ❑ **Cash PAT more than doubled** post commencement of Coimbatore mall operations

# Due to IND AS 115, Percentage Completion method followed earlier is not applicable. In line with IND AS 115 revenue shall be recognised on completion of project. (Impact of IND AS 115: Revenue for quarter ended June 18 is lower by Rs 88.84 mn and Net profit after tax is lower by Rs 21.22 mn)

\* Revenue, EBITDA and EBITDA margin reflects number including other income

# FINANCIAL RESULTS: CONSOLIDATED INCOME STATEMENT

Rs. Mn.	1Q19	1Q18	YoY	4Q18	QoQ	FY18	FY17	YoY
Revenue from Real Estate Projects	-	61.2		158		445.1	299.2	49%
Lease Rental & Related Income	170.1	85.3	99.4%	167.7	1.4%	516.3	332.5	55%
<b>Total Income from operations</b>	<b>170.1</b>	<b>146.5</b>	<b>16.1%</b>	<b>325.7</b>	<b>-47.8%</b>	<b>961.4</b>	<b>631.7</b>	<b>52%</b>
Other Income	41.8	21.7	92.6%	45.7	-8.5%	115.6	107.5	8%
<b>Total Income including other income</b>	<b>211.9</b>	<b>168.1</b>	<b>26.1%</b>	<b>371.4</b>	<b>-42.9%</b>	<b>1,077.0</b>	<b>739.2</b>	<b>46%</b>
<b>EBITDA w/o Other Income</b>	<b>100.5</b>	<b>44.8</b>	<b>124.3%</b>	<b>132</b>	<b>-23.9%</b>	<b>376.3</b>	<b>49.1</b>	<b>667%</b>
<b>EBITDA</b>	<b>142.3</b>	<b>66.5</b>	<b>114.0%</b>	<b>177.7</b>	<b>-19.9%</b>	<b>491.9</b>	<b>156.6</b>	<b>214%</b>
<b>EBITDA Margin</b>	<b>67.2%</b>	<b>39.6%</b>		<b>47.8%</b>		<b>46%</b>	<b>21%</b>	
Depreciation	78	26.5	194.3%	86.4	-9.7%	265.7	117.1	127%
Interest	77.1	38.7	99.2%	90	-14.3%	274.7	97.8	181%
Profit before tax	-12.8	1.3	NM	<b>1.3</b>	NM	<b>-48.4</b>	<b>-58.3</b>	<b>17%</b>
Profit after tax	-17.3	2.3	NM	<b>-14.8</b>	NM	<b>-71.7</b>	<b>12.3</b>	<b>NM</b>
<b>PAT after minority interest</b>	<b>-6.4</b>	<b>-2.8</b>	<b>NM</b>	<b>2.8</b>	<b>NM</b>	<b>-42.2</b>	<b>-53.2</b>	<b>21%</b>

## Result Update -

- Due to IND AS 115, Percentage Completion method followed earlier is not applicable. In line with IND AS 115 revenue shall be recognised on completion of project. (Impact of IND AS 115: Revenue for quarter ended June 18 is lower by Rs 88.84 mn and Net profit after tax is lower by Rs 21.22 mn)
- EBITDA margin improved during the quarter as the revenue mix moved towards lease rental and related income
- Depreciation and interest expenses increased compared to corresponding quarter previous year as it now includes numbers from Coimbatore Mall also. Same numbers are lower than Q4 FY18 as in Q4, one – time finance cost for Coimbatore Mall were reflected

## Note-

- Sale of Services represent rent income and CAM Income received from Aurangabad Mall and Coimbatore Mall.; Sale of premises represent Revenues recognized from the Build & Sell model
- Other Income constitutes Interest & Dividend Income on Investments



## 01 Lease Rental revenue up 99% during the quarter

- Lease rental revenue almost doubled with additional revenue from Coimbatore mall
- Revenue expected to increase further with expected operations of Inox in Q2 FY2019 in Coimbatore



## 02 Opening of new stores leading to higher occupancy

- Large Anchor brands, **Hometown, Mark & Spencers, H&M** and Inline Brands like Viva Fitness, Tuan, LG, Riwaayat & Mad Over Chicken commenced operations in Aurangabad
- Major inline brands Sabhyata, Rangriti, Nike and Toni & Guy commenced operations in Coimbatore



## 03 Strong EBITDA margin of 67.2%

- EBITDA stands at Rs 142 mn, **114% higher than 1Q FY2018**
- With opening of new stores during the quarter, EBITDA is expected to increase further during the year



## 04 Profitability

- Higher interest and depreciation booking on account of commencement of Coimbatore Mall drags PBT, which is in line with nature of Mall Business
- Improvement in Leasing and Coimbatore mall stabilization will lead to improvement in profitability

## 01

### AURANGABAD MALL

- ❑ Letting out the balance space and also maintain effective Brand mix by undertaking churn in the mall

## 02

### COIMBATORE MALL

- ❑ **Leasing stands at 89%**, working towards further increasing occupancy
- ❑ With further brands under discussion, leasing should go **above 90% during FY19**

## 03

### NAGPUR SPV

- ❑ Project nearing completion. Phase wise delivery to start from Q3 FY19.
- ❑ Planning for Nagpur mall construction underway, see good opportunity for retail in Nagpur

## 04

### COIMBATORE RESI & INDORE LAND

- ❑ Statutory approval received for Coimbatore residential phase -1 and construction to start soon
- ❑ In Indore, pre launch sale of Plots with focus on faster monetization has commenced





***Aurangabad Mall***



***Nagpur Mall***



***Nagpur Residential***



***Coimbatore Mall***



***Aurangabad PTC***

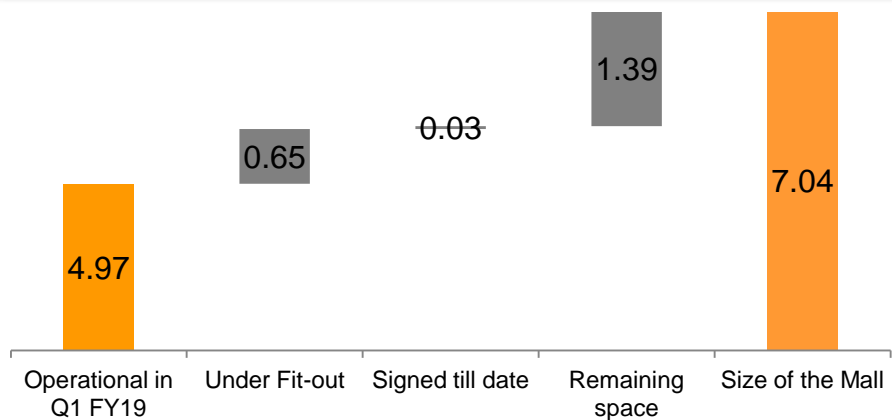


***Coimbatore Residential***





## Occupancy

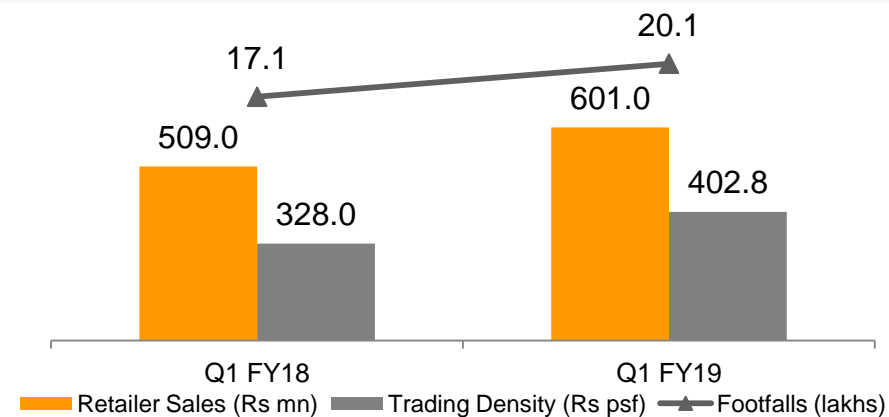


## Key Operating Parameters

Q1 FY2018-19

Gross Leased Area (lakh sq.ft.)	5.7
Current Leasing Status	80%
Number of Stores Signed	102
Retailer Sales (Rs. Mn.)	601
Average Monthly Trading Density (Rs/sqft)	403
Footfalls (Mn.)	2.01

## Footfall & Trading Density



Operational Details (Rs. Mn.)	Q1 FY19	Q4 FY18	Q3 FY18	Q2 FY18	Q1 FY18
Area Leased (lakh sq. ft.)	5.65	5.43	5.67	5.57	5.41
% Leased	80%	78%	80%	79%	77%
Sale of Premises	-	60.3	34.9	30.7	28.9
Rental Income	46.9	56.7	46.9	43.9	49.0
Recoveries (CAM & Other)	42.2	41.9	39.9	37.4	38.4
<b>Total Income</b>	<b>89.1</b>	<b>158.0</b>	<b>121.7</b>	<b>112.0</b>	<b>116.3</b>
<b>EBIDTA</b>	54.9	83.8	73.8	63.8	57.7
<b>EBIDTA Margin % (as % of Total Income)</b>	<b>61.6%</b>	<b>53.0%</b>	<b>60.6%</b>	<b>57.0%</b>	<b>49.6%</b>

- Brand churn has been undertaken to bring in international brands like H&M and M&S. Churn includes shifting of existing stores and change in mall layouts to meet requirements of tenants and to improve customer experience as well as overall performance of the Mall.
- Due to IND AS 115, Percentage Completion method followed earlier is not applicable. In line with IND AS 115 revenue shall be recognised on completion of project.
- EBIDTA continues to improve over the quarters, **EBIDTA margin for Aurangabad mall stands at 61.6%**

# NEW STORES OPENED at AURANGABAD MALL



# BRAND PARTNERS AT AURANGABAD MALL



## Maharashtra Day Celebration



## Fashion Show



## Samsung Smart Café Activity



## Kids Carnival



Prozone Trade Center (PTC) Phase 1	Q1 FY 2018-19
Total Area Launched (sqft)	190,528
Total Units Launched (No)	117
Total Area Sold (sqft)	184,796
% Total Area Booked	96%
Avg. Sale Rate per sqft (Rs)	3,258
Total Sale Value (Rs. Mn.)	595.4
Amount Collected (Rs. Mn.)	224.2
Estimated Project Completion Date	Q2 FY19



### Prozone Trade Centre (PTC) Phase 1

- Construction of Prozone Trade Centre (PTC) Phase 1 of ~190,000 sq ft progress as per plan
- **Expect net cash inflows of ~Rs. 306 Mn. to be generated by FY19**
- Applied for OC





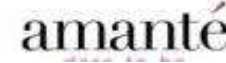
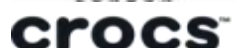
Operational Details (Rs. Mn.)	Q1 FY19	Q4 FY18	Q3 FY18	Q2 FY18
Area Leased (lakh sq. ft.)	4.45	4.42	4.37	4.23
% Leased	89%	88%	87%	85%
Rental Income	57.7	42.8	48.2	21.0
Recoveries (CAM & Other)	29.9	28.2	24.1	12.8
<b>Total Income</b>	<b>87.6</b>	<b>71.0</b>	<b>72.3</b>	<b>33.8</b>
<b>EBIDTA</b>	<b>66.2</b>	<b>45.0</b>	<b>48.9</b>	<b>8.4</b>
<b>EBIDTA Margin % (as % of Total Income)</b>	<b>75.6%</b>	<b>63%</b>	<b>68%</b>	<b>25%</b>

- Rentals income improved during the quarter due to new store launched also March quarter reversal of income due to lower revenue share of H & M and rebate granted to few of the brands
- **Strong EBITDA margin at 75.6%**, with EBITDA of Rs 66.2 mn during the quarter
- Coimbatore mall is expected to reflect stabilised income in **FY2018-19**

# NEW STORE OPENING AT COIMBATORE MALL



# RETAIL – STRONG BRANDS AT COIMBATORE MALL



## WORLD BREASTFEEDING WEEK : 4TH & 5TH AUG 2018



## Fashion Show

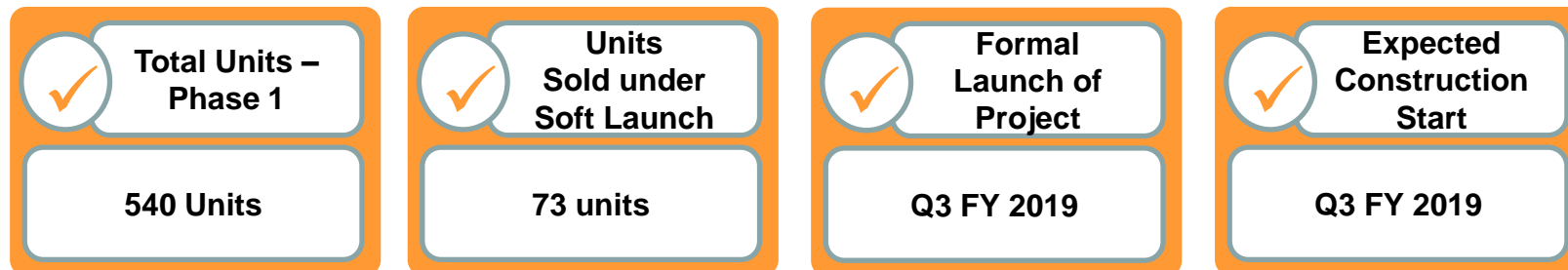


Coimbatore Residential (CGI)



- ~1.9 m sqft of residential
- 7 towers of 18 floors comprising 1,152 apartments
- **Amenities:**  
Club house, swimming pool, tennis court, amphi theatre, squash court, gymnasium

## RESIDENTIAL UPDATE



- **0.5m** sqft of retail space under planning
  - **0.39m** additional development potential
- 
- **4.5m** catchment population
- 
- **15.7 acres** of residential under development
- 
- **12 towers** of 14 floors comprising ~**1,000** apartments
- 
- **Amenities:** Club house, swimming pool tennis court, amphi theatre, cricket court, meditation centre, gymnasium



Nagpur mall design (CGI)

**RESIDENTIAL UPDATE**

<p><b>Units Launched</b></p> <p>336 Units</p>	<p><b>Units Sold</b></p> <p>278 units</p>	<p><b>Sale Value</b></p> <p>Rs. 1,748 mn</p>	<p><b>Cash Collection</b></p> <p>Rs. 1,299 Mn</p>
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- **1.9m** city population
- Prominent business and industrial centre in Madhya Pradesh
- **43.5 acres** comprising residential township with 5 acres for commercial to be developed in phases
- **Phase 1&2** is for plotted development of about 200 units for better monetisation
- **Phase 3&4** will be high rise development of about **800** apartments
- **Amenities:**  
Club house, swimming pool, tennis court, amphi theatre, cricket court, meditation centre, gymnasium





## Generic Disclaimer

The following is a general overview of Prozone INTU Limited (the “Company”) and is qualified in its entirety by reference to the applicable offering memorandum, memorandum and articles of association or other constitutional documents and subscription agreement (together the “Investment Documents”) relating to the purchase of interests in the Company, all of which will be available upon request from the Company’s administrator and should be reviewed carefully prior to making an investment decision. This overview is being furnished on a confidential basis for discussion purposes only to a limited number of persons who may be interested in this type of investment. Neither the information nor any opinion expressed herein constitutes a solicitation or recommendation by anyone of the purchase or sale of any securities or other financial instruments. Any reproduction or distribution of this overview, in whole or in part, or the disclosure of its contents, without prior written consent is prohibited.

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THANK YOU



Email: [investorservice@prozoneintu.com](mailto:investorservice@prozoneintu.com)

Website: [www.prozoneintu.com](http://www.prozoneintu.com)



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## BUSINESS OVERVIEW

- Prozone Intu Properties Ltd. (Prozone Intu) is jointly developed by Promoters and Intu Properties Plc set up to create, develop and manage world-class regional shopping centres and associated mixed-use developments Pan-India.
- Prozone Intu strategy is to participate and dominate in the retail space in Tier 2 and 3 cities in which robust urbanization is expected, which will result in growth of consuming middle class from 300 to 500 million in next 5 years
- Key Business Strategy - Develop Large scale Land Parcels for Mixed Use development with 75% of the Land to be developed as Residential & Commercial – Build & Sell model whereas 25% of the Land to be developed as Retail – Build & Lease Model

## STRONG PEDIGREE

- The Promoters hold 31.1%, INTU holds 32.4% and balance is held by public<sup>1</sup>
- Intu Properties is UK's Largest Retail Real Estate Company.
- Intu Properties plc is a UK FTSE 100 listed Company owning and managing assets worth more than 10 bn pounds. They own more than 20 properties across UK and Spain, 10 of which are among the top 25 shopping centers in the UK, representing ~ 38% UK market share.
- Intu Properties plc has more than 22mn sqft of retail space; 400 million customer visits a year

## FULLY PAID UP LAND BANK & ROBUST BALANCE SHEET

- The Company has 17.79 mn sq. ft. of fully paid-up land bank in prime locations with 1.2 mn developed till date and more than 16.5 mn sq. ft. balance to be monetized which is being developed in different phases .
- Robust Balance sheet with Low Leverage.
- At current valuation, the Land bank valuation for the company is expected to be Rs. 20,000 mn

1: As on 30<sup>th</sup> Jun 2018

## **Business Strategy –**

- Develop Large scale Land Parcels for Mixed Use development.
- 75% of the Land to be developed as Residential & Commercial – Build & Sell model
- 25% of the Land to be developed as Retail – Build & Lease Model
- The Company follows this model so as the Cash Flows from Build & Sell portfolio facilitate the Build & lease model, Thus resulting into Debt Free Annuity Assets and free cash flows for future developments.

## **Residential Projects - Strategy**

- The Company invests and develops the entire Clubhouse and Site Infrastructure for the project upfront before the Launch of the Project.
- It provides credibility to the business and accelerates the sale of the project, resulting into better cash flows.
- Due to this, the Company emerges as the strongest and the most credible player in the region Eg, In Nagpur, Company has received an overwhelming response as compared to the best players in the region..

## **Mall Development - Strategy**

- Dominant regional shopping and leisure destination
- Design-G + 1 Mall horizontal model with racetrack circulation
- Infrastructure-Large parking spaces planned to cater for future growth
- Tenant Mix- Well planned tenant mix with category focus to aggregate consumption



- Locations selected in high growth corridors within city limits
- Execute high quality retail assets at the right price and the right time
- Develop and sell mixed-use assets to facilitate retail investments



## **Nikhil Chaturvedi**

Founder and Managing Director, Nikhil is a visionary and hands-on leader, who inspires the organisation with a passion for excellence and single-mindedness to build shareholder value which is his driving force



## **John Abel (Director Emeritus)**

Mr John Abel joined the Liberty Intl Group in 1972 and was appointed an Executive Director in 2000. He was appointed a Director of INTU in 1994 and MD in 2005 and he continues as a consultant to Intu Properties plc with a special focus on India



## **Dushyant Sangar**

Mr. Dushyant Sangar is the Corporate Development Director of Intu Properties plc and is a member of Intu's Executive Committee which is responsible for the day to day operations of the business. He has overall responsibility for Intu's acquisitions, divestments and joint venture transactions. Prior to Intu, Dushyant worked for MGPA & UBS



## **Salil Chaturvedi**

Co-Founder, and Deputy Managing Director, Salil's vision has charted the strategic direction of the Company. He leads all business development, land acquisition and new asset class initiatives in the residential and commercial sectors



## **Punit Goenka**

Mr. Goenka, Director of Essel Group, is CEO of Zee Entertainment Enterprises Limited, managing one of India's most successful TV and Media businesses. He has an extensive, diversified background in the areas of media, entertainment, and telecommunications in global markets



## **David Fischel**

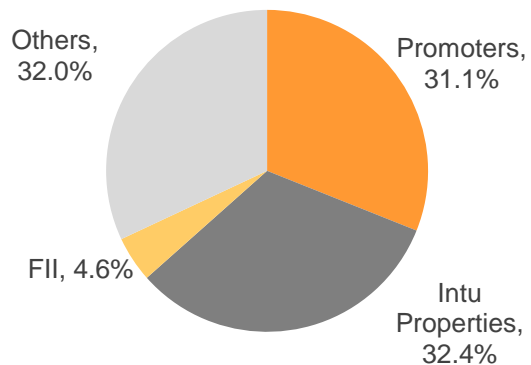
Mr David Fischel is the Chief Executive of Intu Properties Plc. He converted the business into a Real Estate Investment Trust (REIT) to make Intu one of the top 20 REITs in the world. He is today one of the most respected retail property professionals of his generation



## **Deepa Harris (Independent Director)**

Ms. Deepa Misra Harris is Founder & CEO of BrandsWeLove Marketing and Branding Services. Specialist in Branding, Marketing and Sales, Deepa has over 30 years experience in the luxury and hospitality category.

**Shareholding in % – Jun 2018**



Source: BSE

**Share Price Performance**



**Key Investors**

**Holding (%)**

ACACIA Partners	3.25%
Aditya Chandak & Family	3.08%
Rakesh Jhunjhunwala	2.46%
Ramesh Damani & Family	1.19%
Cavendish AM	1.18%
Life Insurance Corporation (LIC)	0.11%

**Market Data**

**As on 08.08.18 (BSE)**

Market Capitalisation (Rs Mn)	5,913
Price (Rs)	38.8
No. of Shares Outstanding (Mn)	152.6
Face Value (Rs)	2.0
52-Week High-Low (Rs)	78.4 – 33.0