

Ref. No.: GTPL/SE/2025

April 16, 2025

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 Audited Financial Results for the quarter and financial year ended March 31, 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 Audited Financial Results for the quarter and financial year ended March 31, 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
Company Secretary and Compliance Officer

Encl: As above



GTPL Hathway Limited

Q4 & FY25 Results Update



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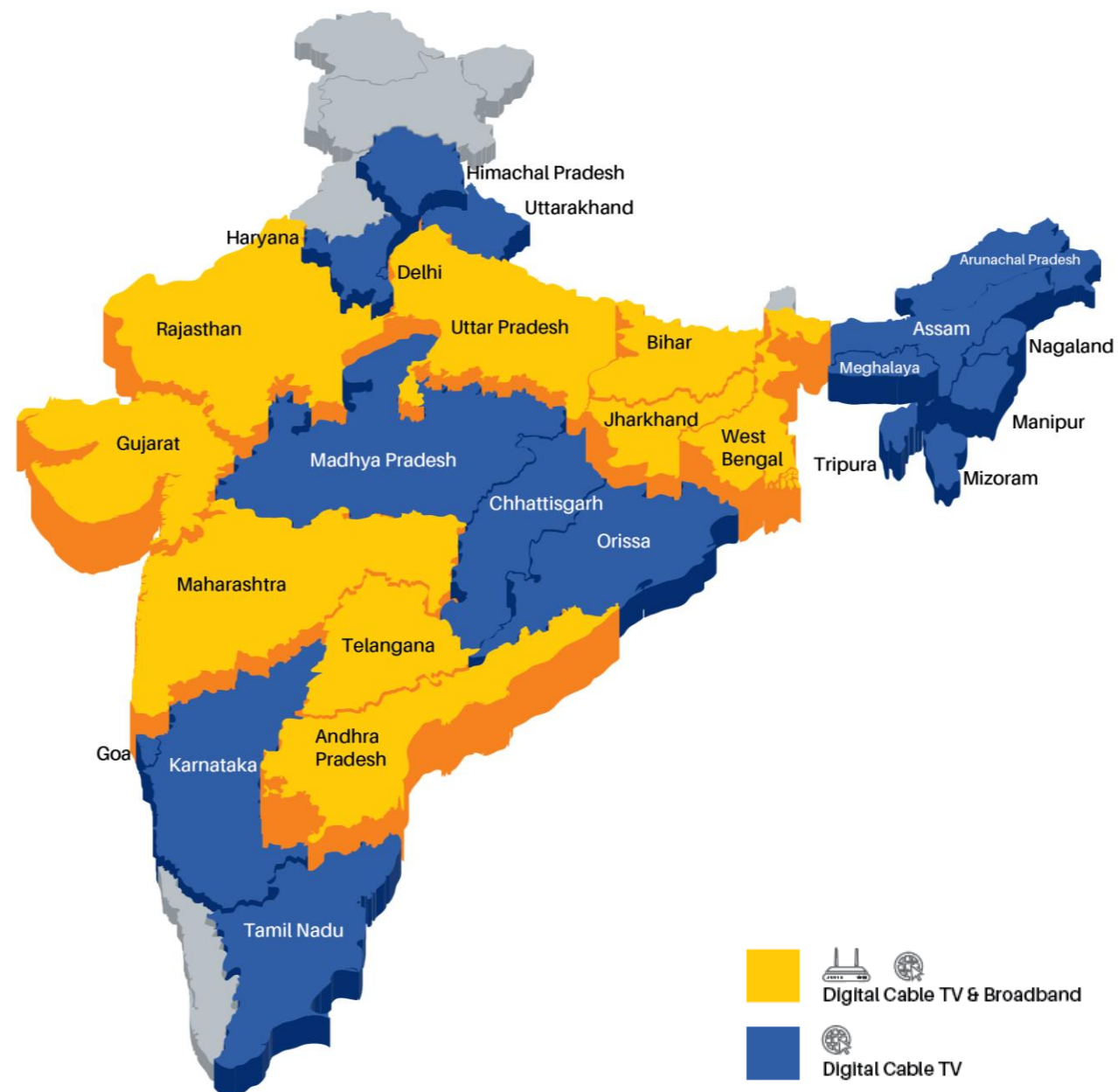
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Company Overview

Leader Across Key Markets




- 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

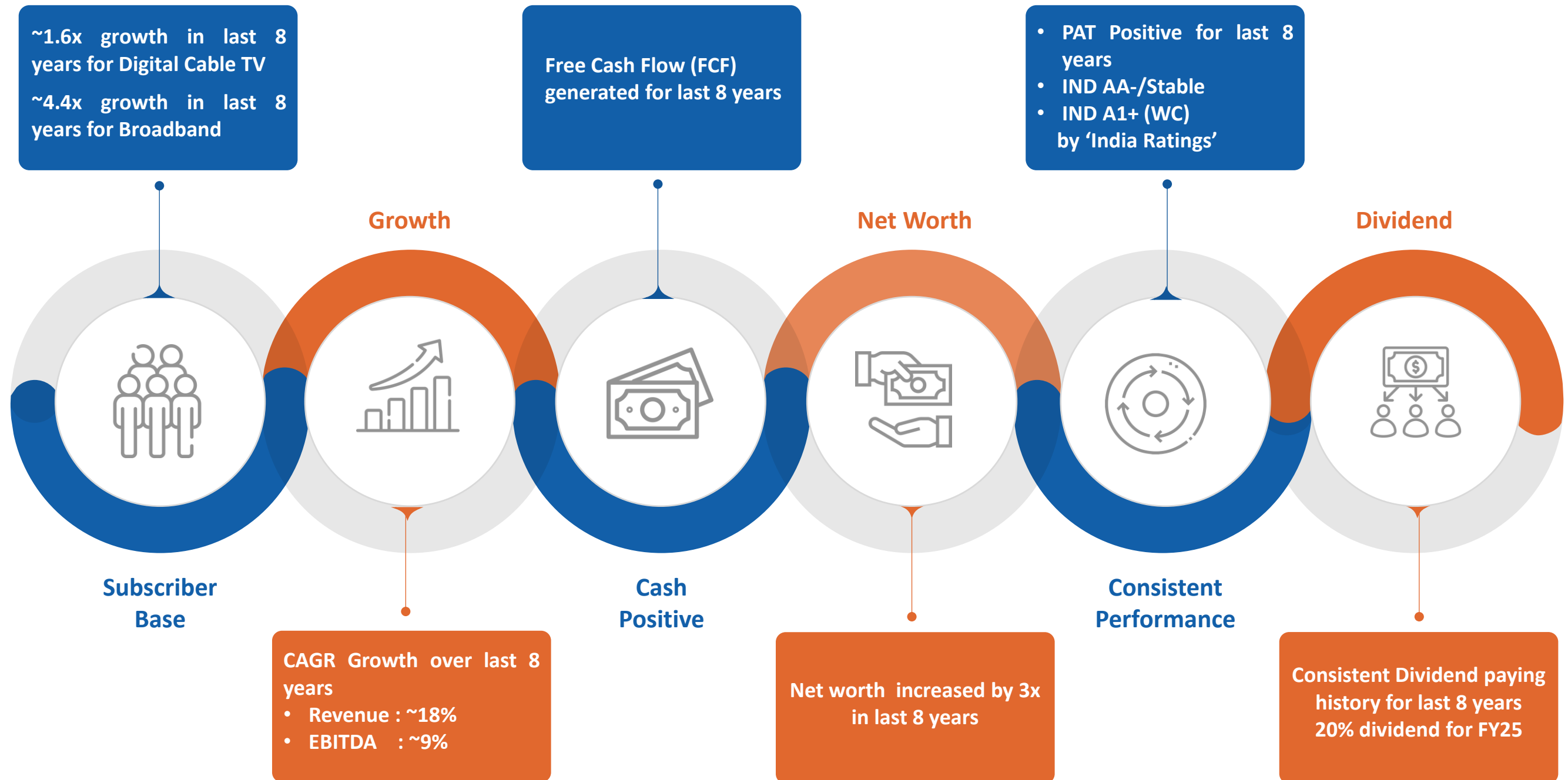
Leading private Wireline Broadband Player
No. 1 in Gujarat**
1+ Mn Broadband subscribers


- 05

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



Value Creation Over The Period Of Time



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 950+ channels including 95+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

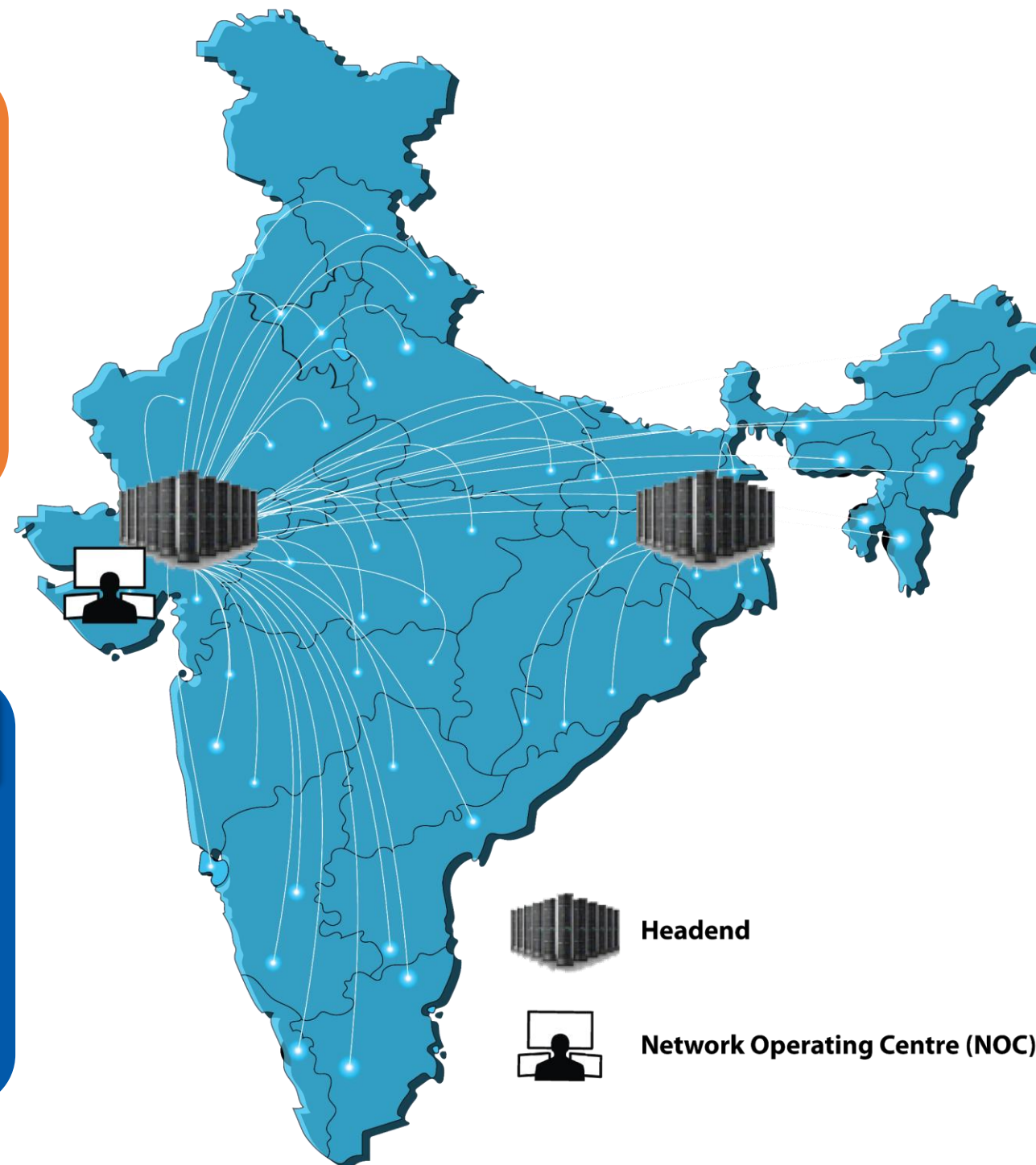
Fiber Infra

Vast Optical Fiber

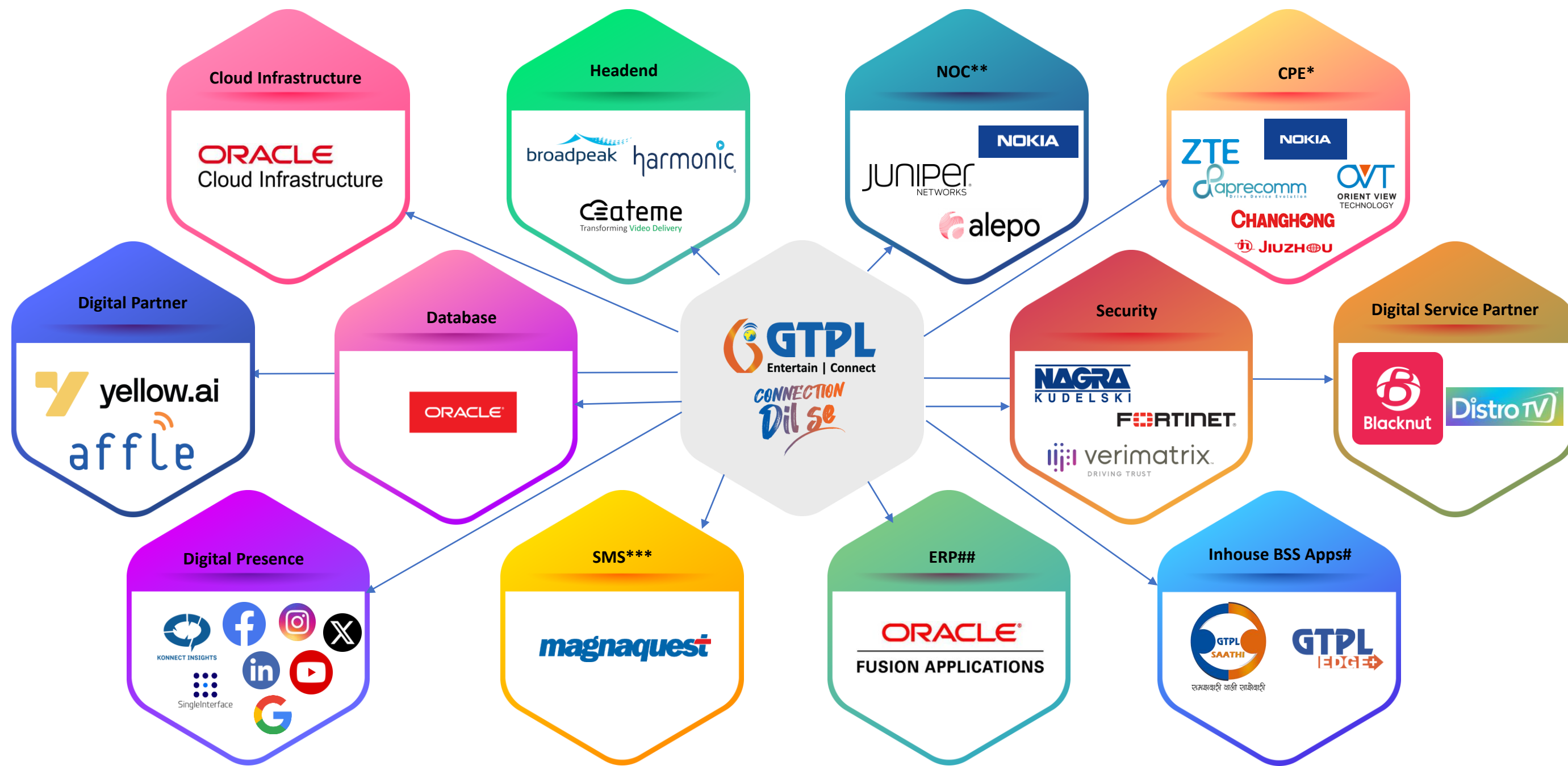
- Owned :1,00,000+ KMs
- Leased : 16,000+ KMs

Office Infra

336 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

Inherent Strengths

Preferred Partner

01

- 47,000+ 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 High-Speed Broadband upto 200 Mbps & premium Digital Cable TV services nationwide
- 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
- 950+ Tv Channels, 95+ 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 – 9.60 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***



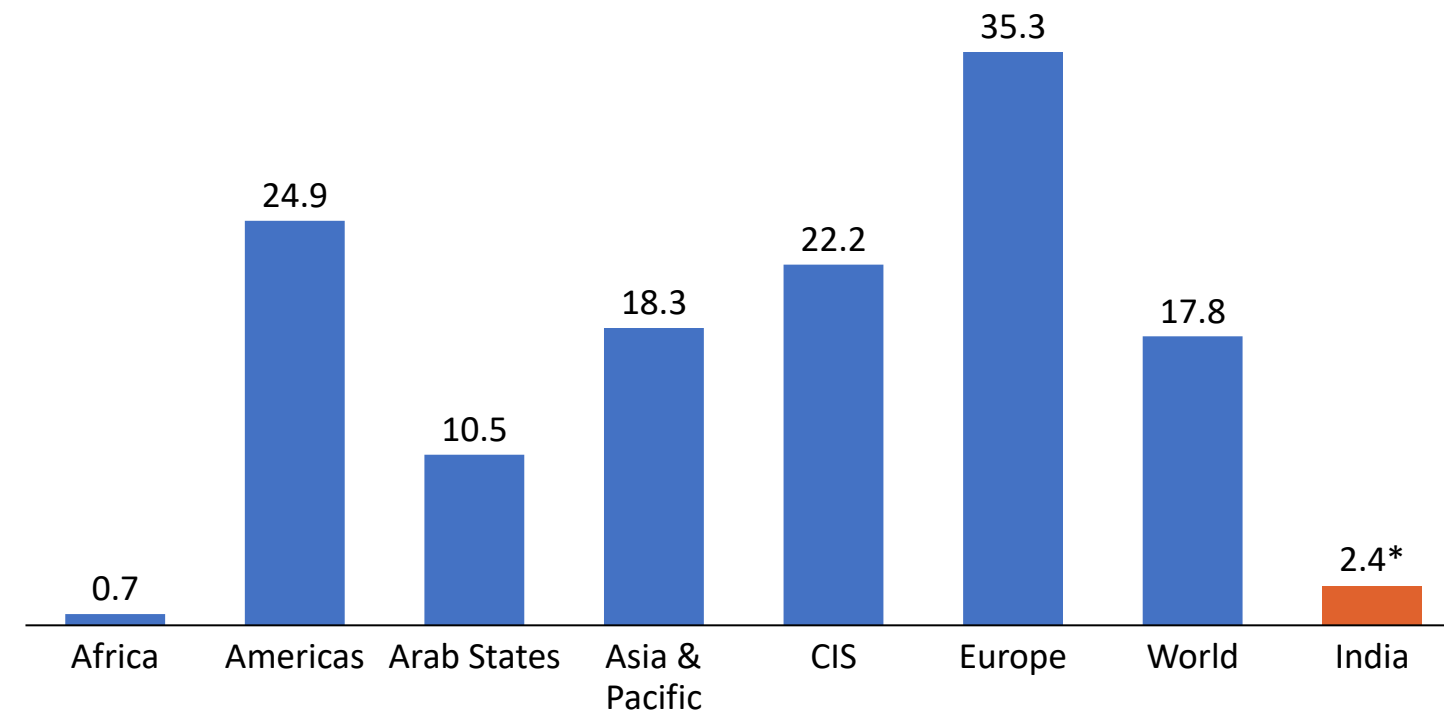
Industry dynamics favouring market consolidation in favour of organised players - MSO registration cancellation as well as shift from unorganised players presents opportunity for further **~40 Mn households***

Total broadband connections that can be targeted

~150 Mn households*

GTPL Hathway's Wireline Broadband Subscribers – 1.0+ Mn

Number of fixed broadband subscriptions per 100



India has one of the lowest fixed broadband penetration. December 2024 wired broadband subscribers stood at 41.19Mn as per TRAI. With ~325 Mn households in India – current subscribers represent **~13% penetration** which is far lower than penetration in developed nations.

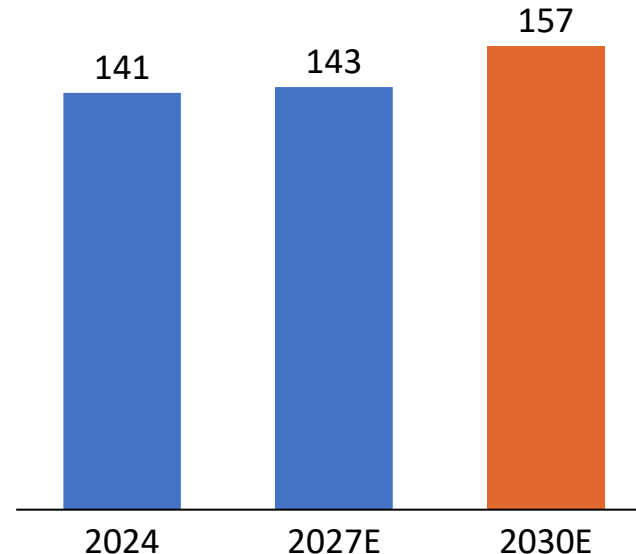
Capitalising on Favourable Industry Tides

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

TV continues to remain amongst the top media consuming platform. Aggregated viewership of **1.5 trillion gross AMA¹** in 2024 – marginally better than 2023

Company's operational segment subscription estimates²
(in millions)

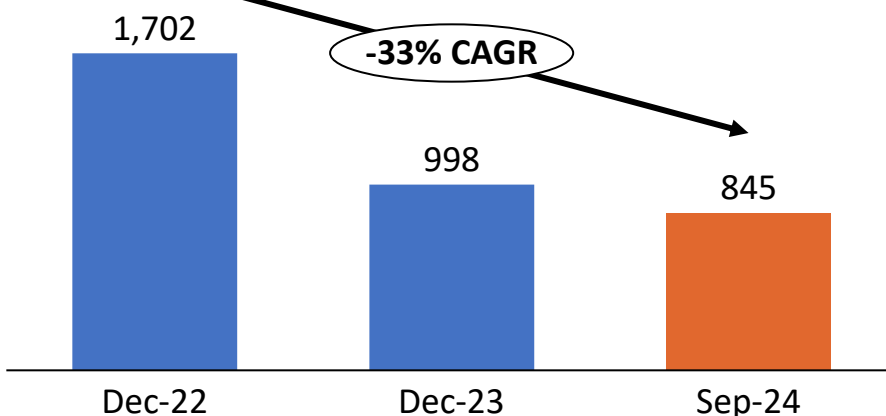


Average time spent per day increased slightly to reach 3:42 hours a day **with ~56% of overall viewership from non-hindi** languages

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

MSO Count



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

Strategies to Enhance Cable TV Business

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



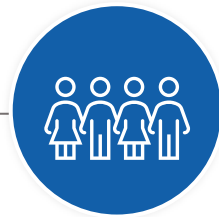
- Online payment mode available for instant activation of services.
- Availability of additional touch points for customer interaction including WhatsApp, Social Media, Website and Consumer Application

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



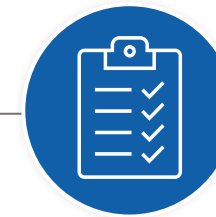
Acquiring Customers

- 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 Consumer & Enterprise needs

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.



Key Performance Indicators

Cable TV Business Performance



9.60Mn

Active STBs¹



8.90Mn

Paying Subscribers



47K+

Business Partners



80%+

Digital Collection



100%

Base in prepaid
business



Launch

GTPL Buzz

New customer facing App

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

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

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.**

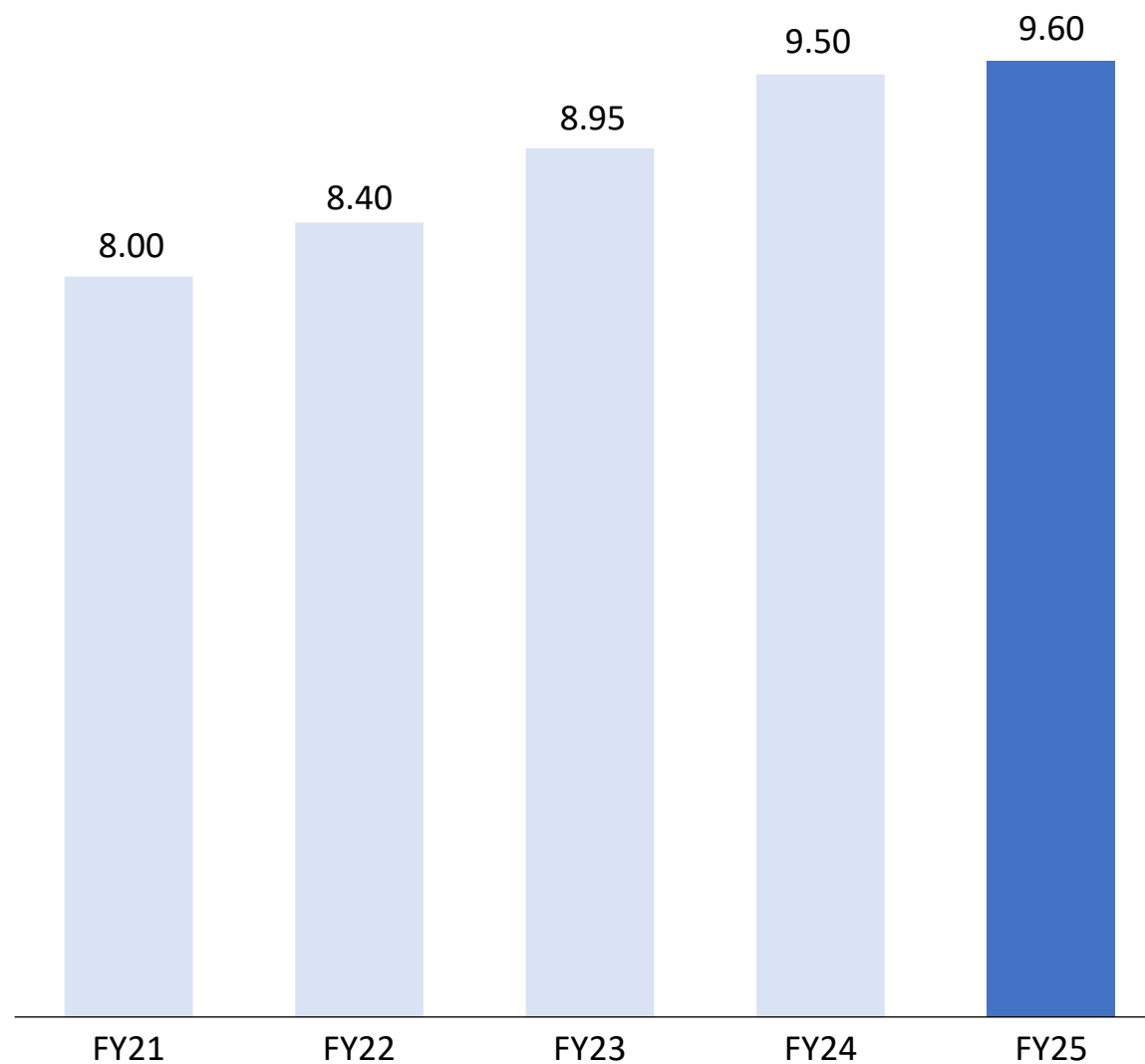
130+ Owned & Operated Channels

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

¹Active = Active during last 60 days

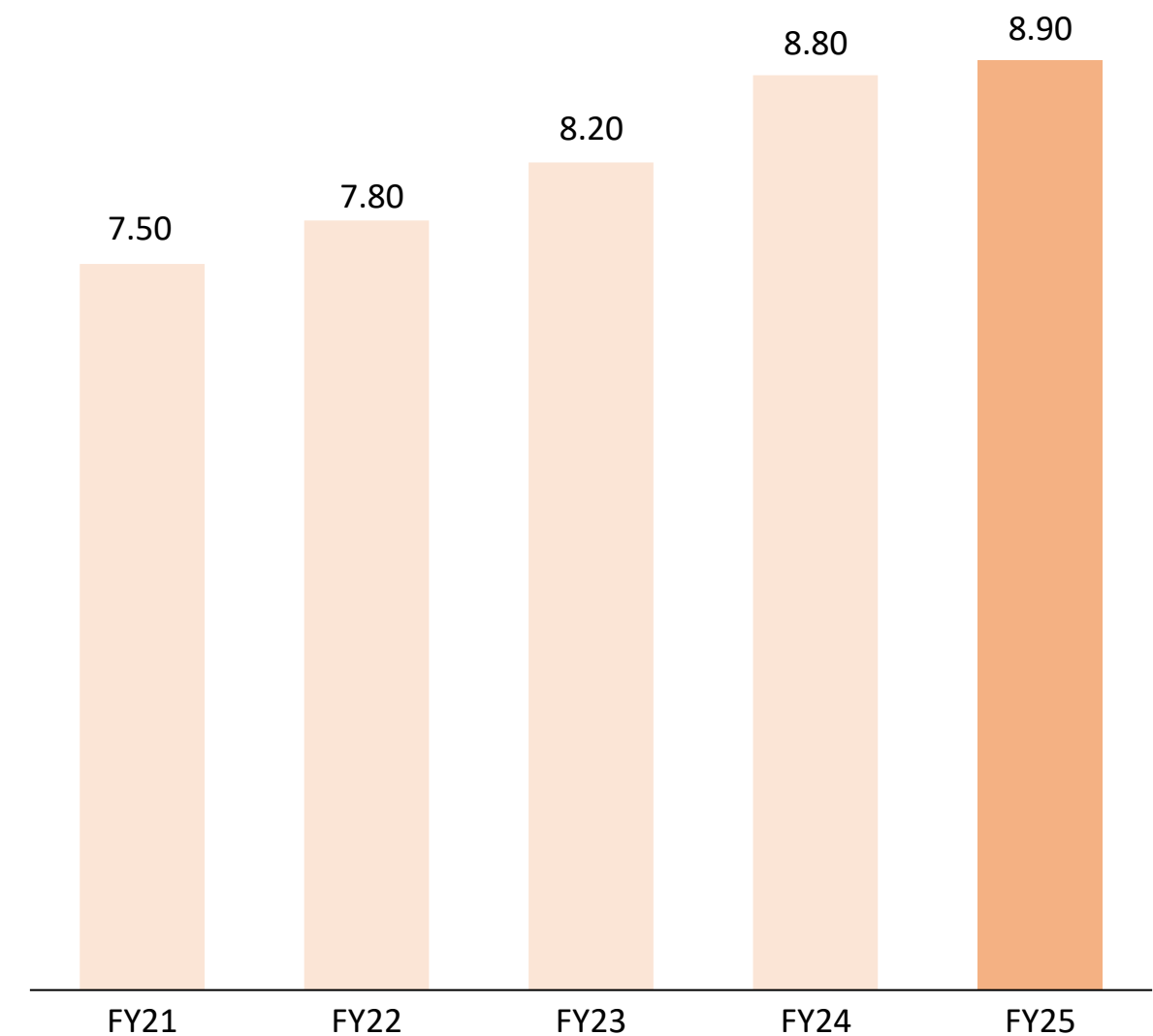
Cable TV Business: Annual*

Active¹ Subscribers (Mn)



Active Subscribers increased by 100K Y-o-Y

Paying Subscribers (Mn)



Paying Subscribers increased by 100K Y-o-Y

Broadband Business Performance



1045K

Active Subscribers



5.95Mn

Home-pass

Increase of **25K (2%)** Subscribers Y-o-Y

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



396GB

Average Data consumption per month



4%

Y-o-Y Revenue Growth

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

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



200 Mbps

Speed with unlimited data



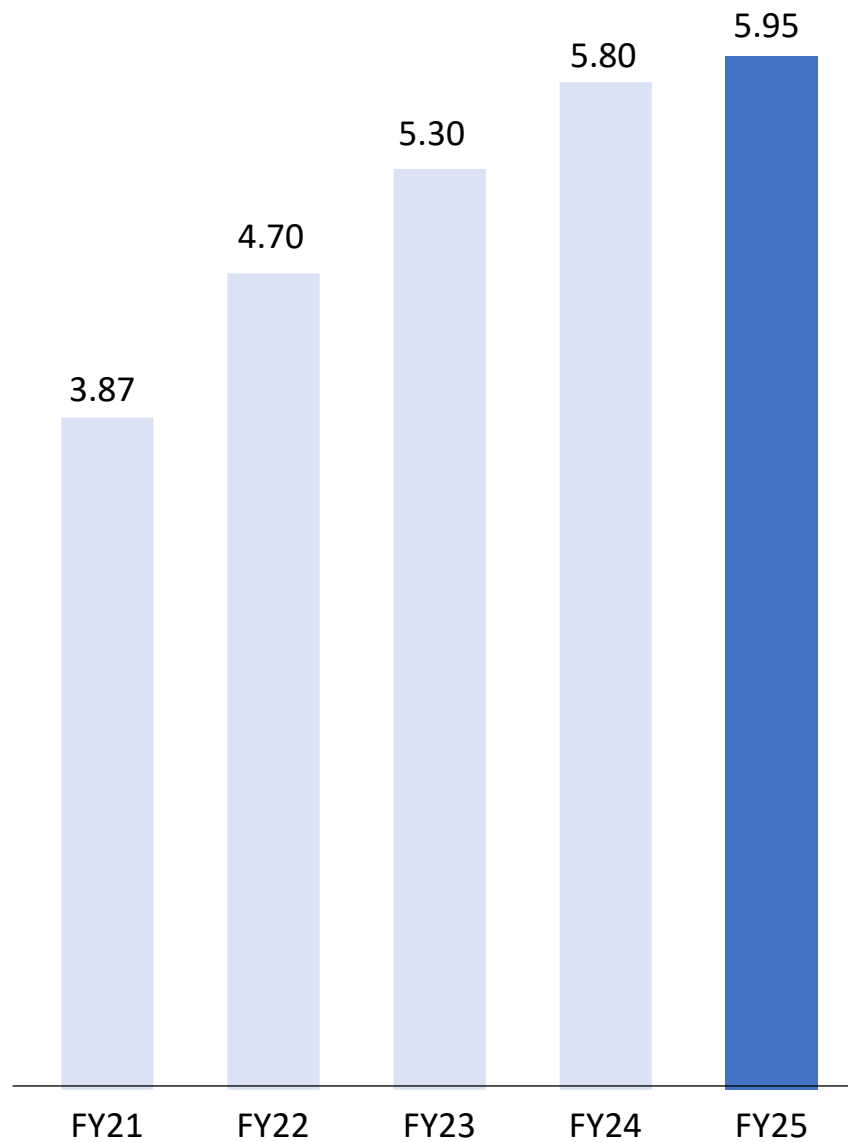
₹ 465/-

ARPU

Average Data Consumption per Customer stands at **396 GB** / Month for Q4 FY25; up by **11 %** Y-o-Y

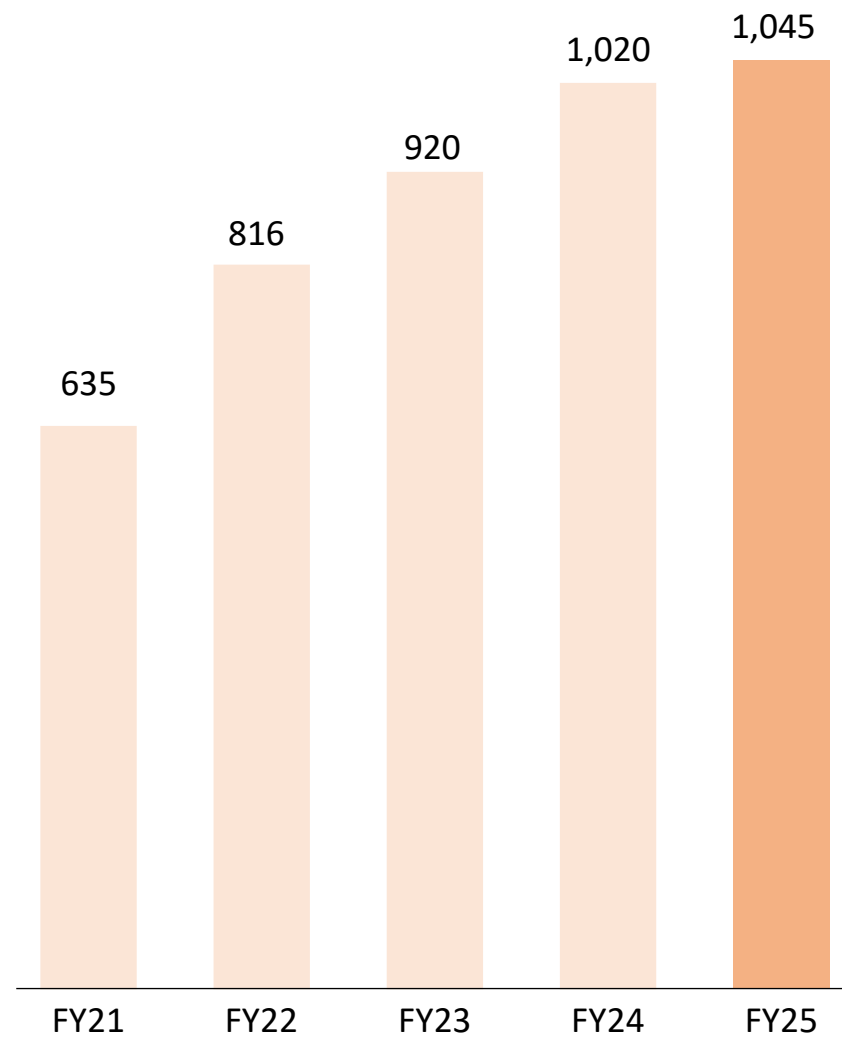
Broadband Business: Annual*

Homepass (Mn)



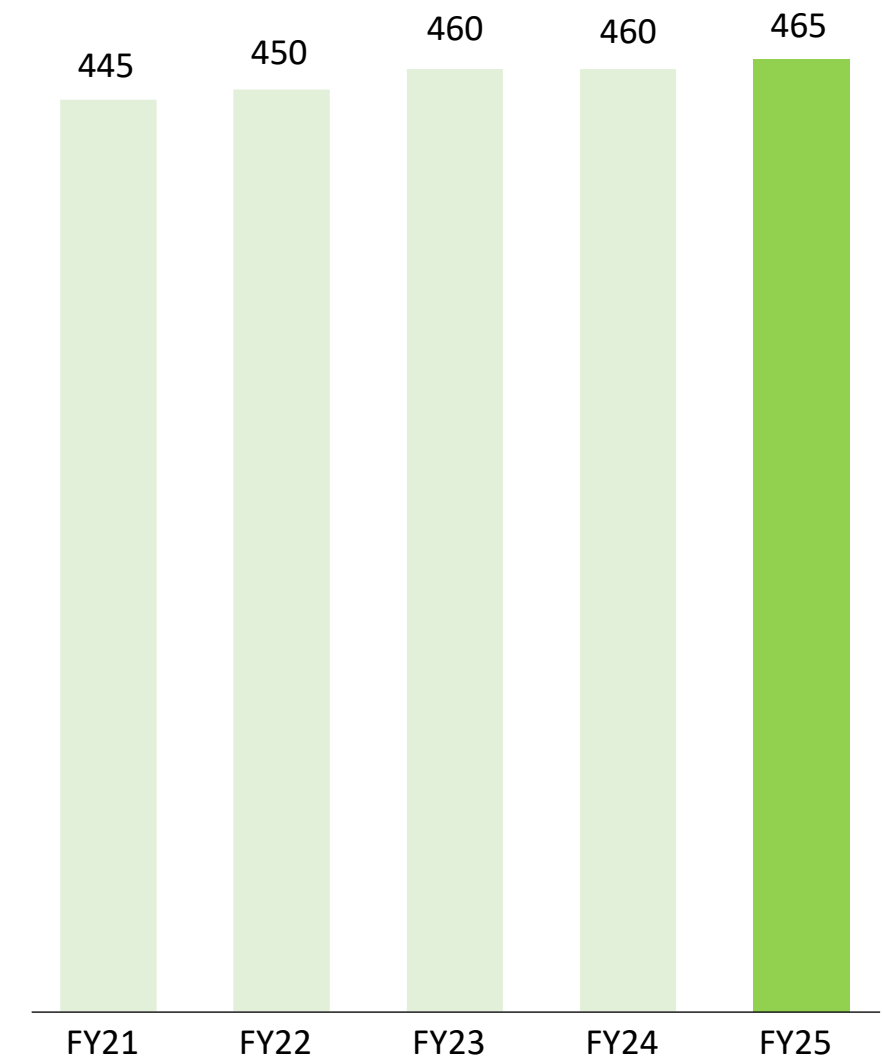
Homepass increased by 150K Y-o-Y

Active Subscriber's ('000)



ACB increased by 25K Y-o-Y

ARPU (₹) (Net of Taxes)



ARPU increased by ₹ 5 Y-o-Y

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



Consolidated Financials

Financial Highlights : Consolidated *



1 Revenue

Total Revenue up by 8% Annually & 10% Y-o-Y
ISP Revenue up by 4% Annually & 4% Y-o-Y

2 EBITDA

EBITDA of ₹ 4,625 Mn in FY25 & ₹ 1,144 Mn in Q4 FY25
EBITDA Margin stands at 13.2% in FY25

3 PBT

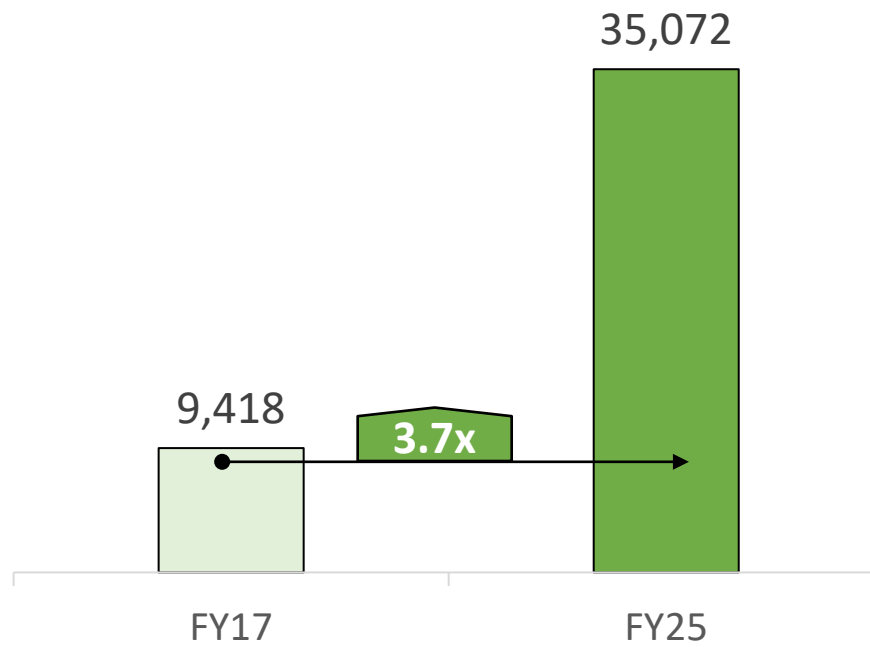
PBT of ₹ 641 Mn in FY25 & ₹ 124 Mn in Q4 FY25

4 DIVIDEND

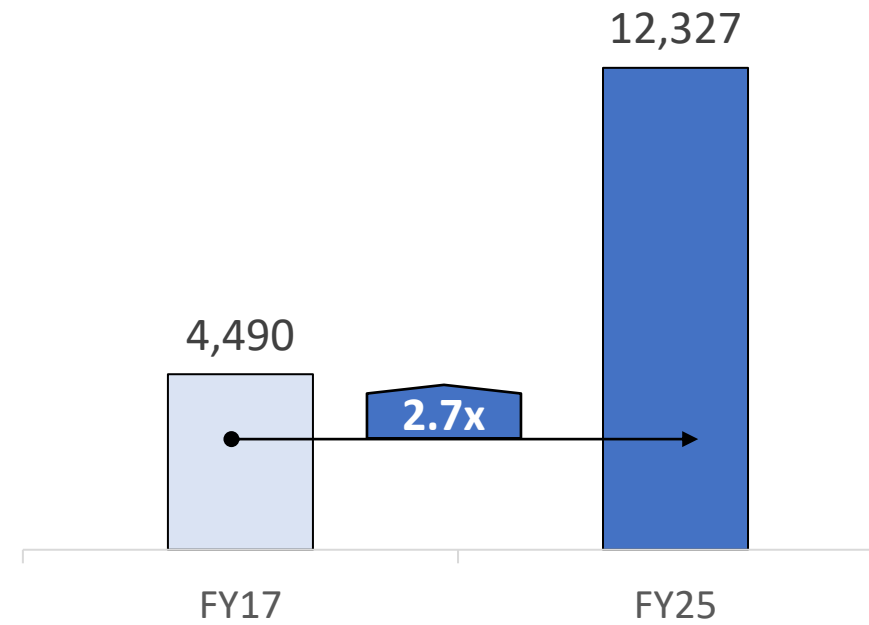
Board of Directors have recommended Dividend of 20%
(₹ 2/- per share)

Financial Highlights : Consolidated *

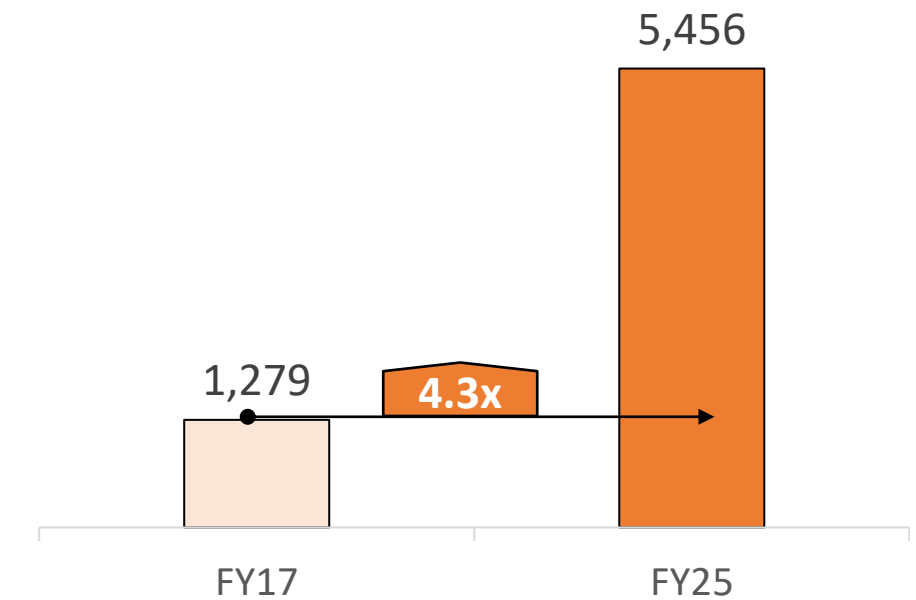
Total Revenue



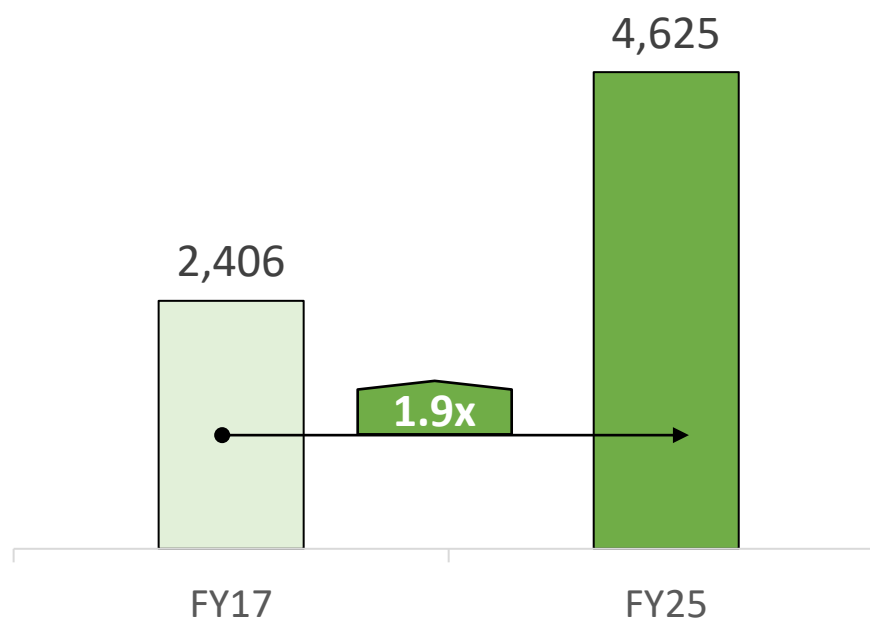
CATV Subscription Revenue



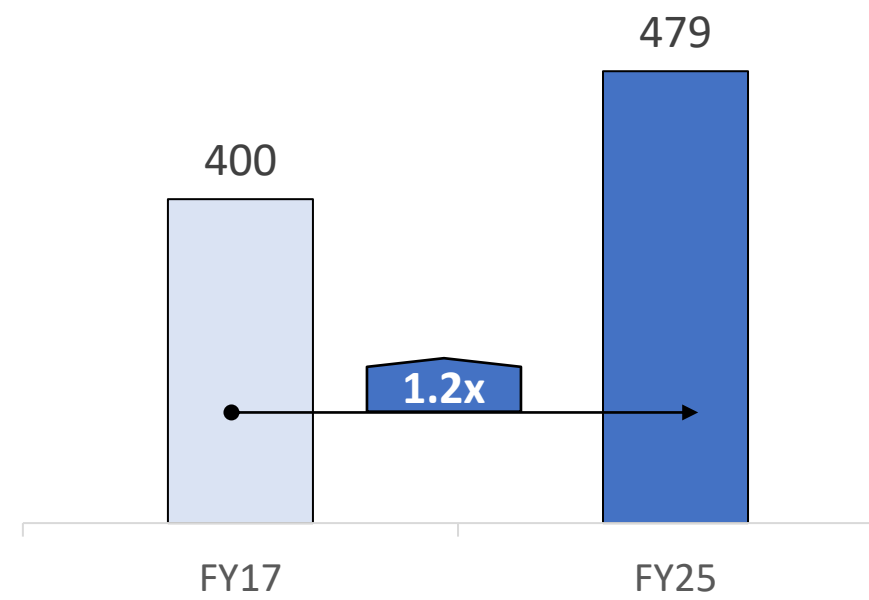
Broadband Revenue



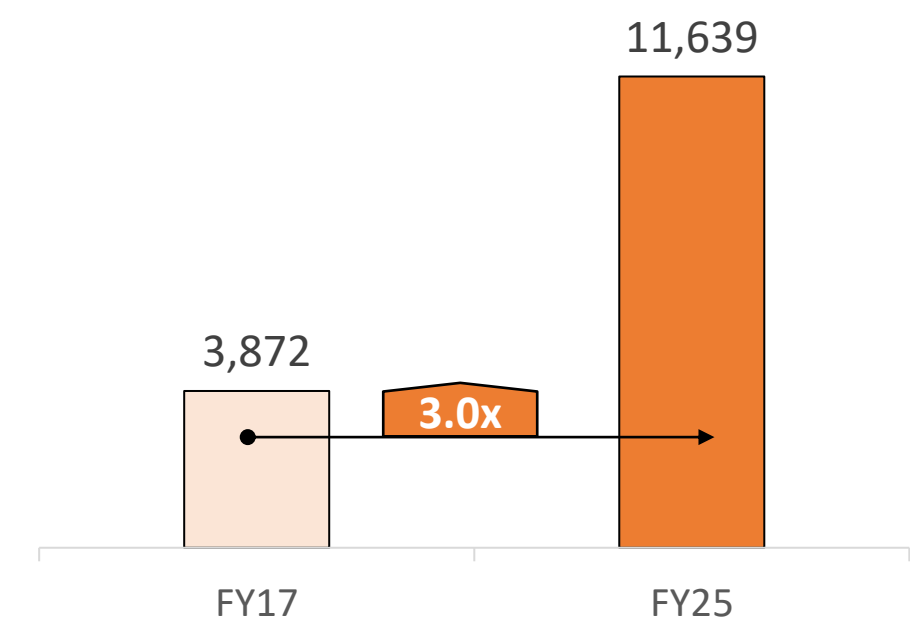
EBITDA



PAT



Net Worth



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

Profit & Loss Statement: Consolidated *

Particulars	Q4 FY25	Q3 FY25	Q-o-Q%	Q4 FY24	Y-o-Y%	FY25	FY24	Annual%
Revenue								
Subscription Income CATV	2,982	3,024	-1%	3,148	-5%	12,327	12,604	-2%
Broadband ISP	1,358	1,383	-2%	1,308	4%	5,456	5,268	4%
Placement / Carriage / Marketing Incentive	4,204	4,147	1%	3,349	26%	15,693	12,677	24%
Project Income	-	-	-	-	-	-	416	-
Activation	44	33	34%	49	-11%	161	174	-7%
Other Operating Income	323	287	13%	226	43%	1,134	985	15%
Other Income	79	84	-6%	69	16%	300	336	-10%
Total Income	8,989	8,957	0%	8,148	10%	35,072	32,460	8%
Expenditure								
Pay Channel Cost	5,348	5,399	-1%	4,637	15%	20,733	17,983	15%
Employee Cost	380	401	-5%	401	-5%	1,592	1,545	3%
Project Cost	-	-	-	-	-	-	414	-
Other Operating, Admin & Selling Exp.	2,117	2,018	5%	1,913	11%	8,122	7,407	10%
Total Expenditure	7,845	7,819	0%	6,951	13%	30,447	27,349	11%
EBITDA	1,144	1,138	1%	1,198	-4%	4,625	5,111	-10%
EBITDA %	12.7%	12.7%		14.7%		13.2%	15.7%	
Depreciation/Amortization	937	928	1%	904	4%	3,688	3,372	9%
Finance cost	84	87	-3%	73	14%	296	229	29%
Profit before Tax & Exceptional item	124	124	0%	221	-44%	641	1,510	-58%
Exceptional Items	(1)	-		-		(1)	-	
Share of Profit/(Loss) from Associate and JVs	(11)	9		(3)		2	(2)	
PBT	111	133	-16%	218	-49%	641	1,508	-58%
Tax	3	37		57		149	390	
PAT before Other Comprehensive Income	108	96	12%	160	-33%	492	1,118	-56%
Share of Non Controlling Interest	(2)	5		(29)		(13)	(48)	
Other Comprehensive Income	(2)	1		(4)		0	(1)	
PAT	105	102	2%	128	-18%	479	1,069	-55%

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

Analysis on Operating Margin : Consolidated *

Particulars	Q4 FY25	Q3 FY25	Q-o-Q%	Q4 FY24	Y-o-Y%	FY25	FY24	Annual%
Revenue								
Subscription Income CATV	2,982	3,024	-1%	3,148	-5%	12,327	12,604	-2%
Broadband ISP	1,358	1,383	-2%	1,308	4%	5,456	5,268	4%
Other Operating Income	323	287	13%	226	43%	1,134	985	15%
Total Income	4,662	4,694	-1%	4,682	0%	18,917	18,857	0%
Expenditure								
Net Pay Channel Cost	1,144	1,252	-9%	1,288	-11%	5,039	5,305	-5%
<i>Pay Channel Cost</i>	5,348	5,399	-1%	4,637	15%	20,733	17,983	15%
<i>Placement / Carriage / Marketing Incentive</i>	(4,204)	(4,147)	1%	(3,349)	26%	(15,693)	(12,677)	24%
Employee Cost	380	401	-5%	401	-5%	1,592	1,545	3%
Other Operating, Admin & Selling Exp.	2,117	2,018	5%	1,913	11%	8,122	7,407	10%
Total Expenditure	3,641	3,672	-1%	3,602	1%	14,754	14,258	3%
Operating EBITDA	1,021	1,021	0%	1,080	-5%	4,163	4,599	-9%
Operating EBITDA %	22%	22%		23%		22%	24%	
Activation	44	33	34%	49	-11%	161	174	-7%
Project Margin (Income - Cost)	-	-		-		-	3	
Other Non Operating Income	79	84	-6%	69	16%	300	336	-10%
Published EBITDA	1,144	1,138	1%	1,198	-4%	4,625	5,111	-10%

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

Balance Sheet : Consolidated

Liabilities	As on 31st Mar 2025	As on 31st Mar 2024
Equity		
Equity Share Capital	1,125	1,125
Other Equity	11,804	11,742
Total Equity	12,929	12,867
Non-Current Liabilities		
Financial Liabilities		
Borrowings	559	584
Other Financial Liabilities	649	460
Deferred Tax Liabilities	789	754
Other Non-Current Liabilities	278	253
Total Non-Current Liabilities	2,275	2,051
Current Liabilities		
Financial Liabilities		
Borrowings	1,998	1,700
Trade Payables	9,247	7,154
Other Financial Liabilities	2,675	2,924
Other current liabilities (Deferred Rev.)	3,556	3,839
Current Tax liability(Net)	2	11
Total Current Liabilities	17,477	15,628
Total Liabilities	32,681	30,545

Assets	As on 31st Mar 2025	As on 31st Mar 2024
Non-Current Assets		
Fixed Assets	21,755	21,177
Financial Assets		
Investments	119	106
Other Financial Assets	419	399
Deferred Tax Assets	325	352
Other non-current Assets	997	1,263
Total Non-Current Assets	23,615	23,297
Current Assets		
Inventories	252	244
Financial Assets		
Trade Receivables	5,884	4,373
Cash, Cash equivalents & Bank Balances	1,162	1,488
Other Financials Assets	229	316
Current Tax Assets (Net)	-	-
Other Current Assets	1,539	827
Total Current Assets	9,066	7,248
Total Assets	32,681	30,545



Standalone Financials



Financial Highlights : Standalone



1 Revenue

Total Revenue up by 8% Annually & 10% Y-o-Y

2 EBITDA

EBITDA of ₹ 2,658 Mn in FY25 & ₹ 663 Mn in Q4 FY25

EBITDA up by ₹ 10 Mn Q-o-Q

EBITDA Margin stands at 12 % in FY25

3 PBT

PBT of ₹ 686 Mn in FY25 & ₹ 151 Mn in Q4 FY25

4 PAT

PAT of ₹ 477 Mn in FY25 & ₹ 80 Mn in Q4 FY25

Profit & Loss Statement : Standalone

Particulars	Q4 FY25	Q3 FY25	Q-o-Q%	Q4 FY24	Y-o-Y%	FY25	FY24	Annual%
Revenue								
Subscription Income CATV	2,083	2,112	-1%	2,212	-6%	8,651	8,886	-3%
Placement / Carriage / Marketing Incentive	3,140	3,084	2%	2,588	21%	11,831	10,069	17%
Activation	12	15	-19%	19	-37%	67	110	-39%
Other Operating Income	387	351	10%	271	43%	1,386	1,221	14%
Other Income	71	90	-21%	63	13%	296	324	-9%
Total Income	5,693	5,652	1%	5,154	10%	22,230	20,610	8%
Expenditure								
Pay Channel Cost	3,753	3,824	-2%	3,353	12%	14,796	13,318	11%
Employee Cost	183	194	-6%	191	-4%	771	748	3%
Other Operating, Admin & Selling Exp.	1,093	979	12%	943	16%	4,005	3,657	10%
Total Expenditure	5,030	4,998	1%	4,486	12%	19,572	17,722	10%
EBITDA	663	654	1%	668	-1%	2,658	2,887	-8%
EBITDA %	11.7%	11.6%		13.0%		12.0%	14.0%	
Depreciation/Amortization	446	446	0%	425	5%	1,750	1,628	8%
Finance cost	66	66	0%	42	55%	222	158	41%
Profit before Tax & Exceptional item	151	142	6%	201	-25%	686	1,101	-38%
Exceptional Items	(38)	-		(60)		(38)	(60)	
PBT	113	142	-20%	141	-20%	648	1,042	-38%
Tax	32	36		41		170	279	
PAT before Other Comprehensive Income	81	107	-24%	100	-18%	478	762	-37%
Add/(Less) Other Comprehensive Income	(2)	0		(4)		(1)	(1)	
PAT	80	107	-25%	95	-16%	477	761	-37%

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

Analysis on Operating Margin : Standalone *


Particulars	Q4 FY25	Q3 FY25	Q-o-Q%	Q4 FY24	Y-o-Y%	FY25	FY24	Annual%
Revenue								
Subscription Income CATV	2,083	2,112	-1%	2,212	-6%	8,651	8,886	-3%
Other Operating Income	387	351	10%	271	43%	1,386	1,221	14%
Total Income	2,470	2,463	0%	2,483	-1%	10,036	10,106	-1%
Expenditure								
Net Pay Channel Cost	613	741	-17%	765	-20%	2,965	3,249	-9%
<i>Pay Channel Cost</i>	3,753	3,824	-2%	3,353	12%	14,796	13,318	11%
<i>Placement / Carriage / Marketing Incentive</i>	(3,140)	(3,084)	2%	(2,588)	21%	(11,831)	(10,069)	17%
Employee Cost	183	194	-6%	191	-4%	771	748	3%
Other Operating, Admin & Selling Exp.	1,093	979	12%	943	16%	4,005	3,657	10%
Total Expenditure	1,890	1,914	-1%	1,898	0%	7,741	7,653	1%
Operating EBITDA	580	549	6%	585	-1%	2,296	2,453	-6%
Operating EBITDA %	23%	22%		24%		23%	24%	
Activation	12	15	-19%	19	-37%	67	110	-39%
Other Non Operating Income	71	90	-21%	63	13%	296	324	-9%
Published EBITDA	663	654	1%	668	-1%	2,658	2,887	-8%

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

Balance Sheet : Standalone


Liabilities	As on 31st Mar 2025	As on 31st Mar 2024
Equity		
Equity Share Capital	1,125	1,125
Other Equity	7,945	7,917
Total Equity	9,070	9,042
Non-Current Liabilities		
Financial Liabilities		
Borrowings	448	425
Other Non-Current Liabilities	654	447
Total Non-Current Liabilities	1,102	873
Current Liabilities		
Financial Liabilities		
Borrowings	1,175	1,086
Trade Payables	6,212	4,818
Other Financial Liabilities	2,154	2,320
Other current liabilities	1,048	1,115
Total Current Liabilities	10,589	9,339
Total Liabilities	20,761	19,253

Assets	As on 31st Mar 2025	As on 31st Mar 2024
Non-Current Assets		
Fixed Assets	9,676	8,747
Financial Assets		
Investments	3,907	2,402
Loans & Other Financial Assets	1,102	2,381
Deferred Tax assets	11	90
Other non-current Assets	515	889
Total Non-Current Assets	15,212	14,509
Current Assets		
Inventories	248	232
Financial Assets		
Trade Receivables	3,932	3,367
Cash, Cash equivalents & Bank Balances	327	648
Loans & Other Financial Assets	38	47
Other Current Assets	1,004	450
Total Current Assets	5,549	4,744
Total Assets	20,761	19,253



EMKAY GLOBAL FINANCIAL SERVICES LTD
is pleased to invite you for a conference call to discuss Q4FY25 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, April 17, 2025 at 4:00 PM (IST)

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Thank You