

15th January, 2021

National Stock Exchange of India Limited

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Fax: 022-22723121/1278

Company Code: PVR / 532689

Sub: Quarter 3 – Investor Presentation

Dear Sir / Madam,

Please find attached presentation on Investor update for 03rd quarter for financial year 2020-21.

This is for your information and records.

Thanking You.

Yours faithfully,
For **PVR Limited**

Pankaj Dhawan
Company Secretary cum Compliance Officer

PVR LIMITED

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PVR

INVESTOR UPDATE

Q3 & 9M, FY 2020-21

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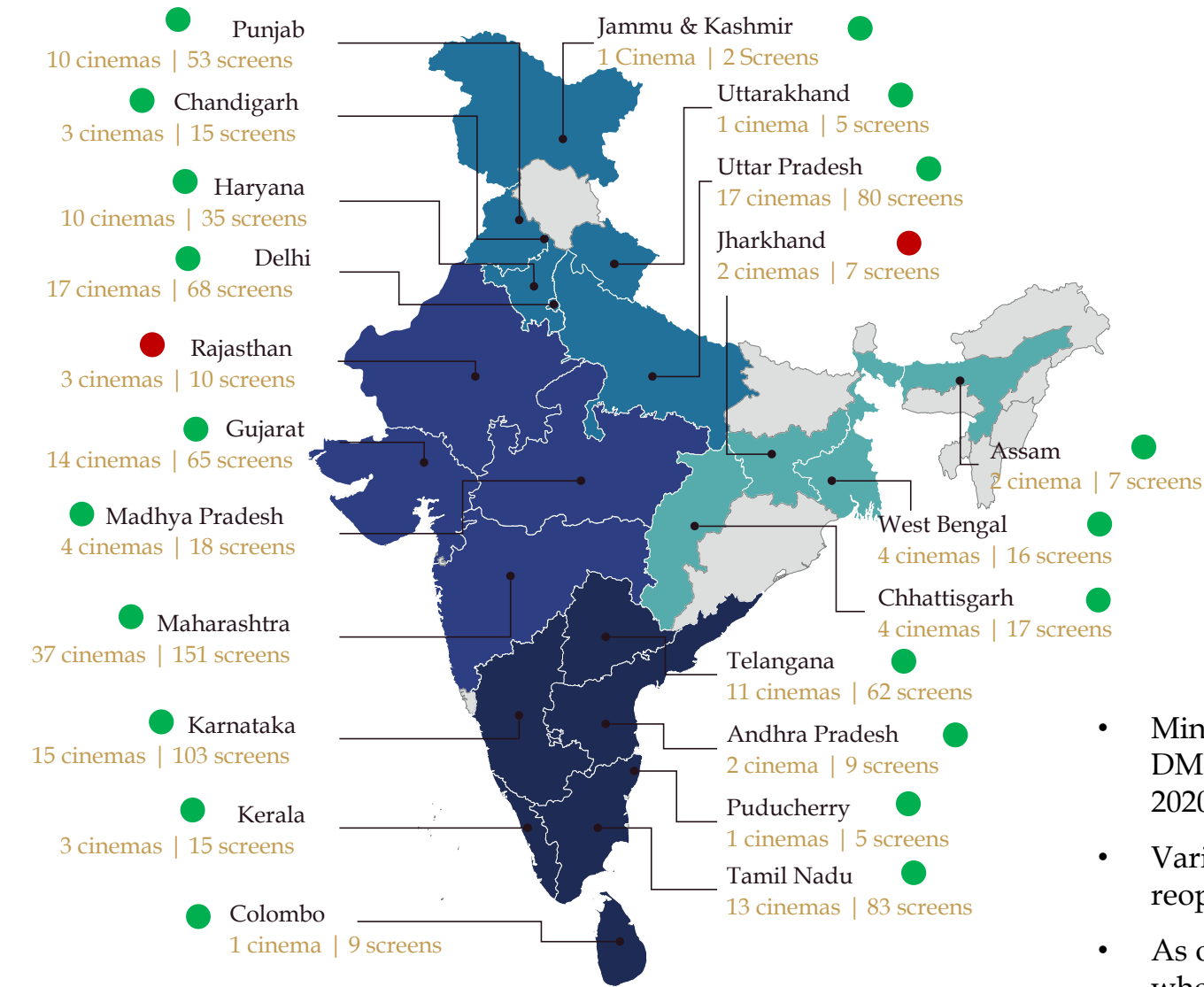
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PARTICULARS	SLIDE NO
Status Update On Reopening Of Cinemas	5
Consolidated Results Summary	6
Update on Negotiation With Landlords	10
Financial Results & Analysis	12
Movie Releases In Q3 FY21 And Content Pipeline	17

Status Update On Reopening Of Cinemas



175

CINEMAS

179K

SEATS

835

SCREENS

71

CITIES

SCREENS BY REGION		
Region	Current	% of total
South*	286	34%
West	244	29%
North	258	31%
East	47	6%
Total	835	

* South includes Sri Lanka

- Ministry of Home Affairs in Unlock 5.0 guidelines (Order No. 40-3/2020-DM-I(A)) dated Sep 30th, 2020 allowed cinemas to reopen from Oct 15th, 2020 onwards with 50% capacity
- Various states have issued their respective notifications for cinema reopening in a staggered manner.
- As on date, except for the state of Rajasthan and Jharkhand, all other states, where PVR has presence, have allowed Cinemas to re-open
- Cinemas in Sri Lanka were shut from March 14, 2020 until July 2, 2020, and from October 11, 2020 until December 31, 2020



CONSOLIDATED RESULT SUMMARY

Results Highlights – Q3, FY 20-21 vs Q3, FY 19-20

INR Lacs

	Total Income	Adjusted EBITDA	Net Profit After Tax
Q3, FY21	6,339	-10,878	-13,674

Q3, FY20	92,389	18,839	5,886

Results Highlights – 9M, FY 20-21 vs 9M, FY 19-20

	Total Income	Adjusted EBITDA	Net Profit After Tax
9M, FY21	11,957	-30,582	-39,398

9M, FY20	2,79,045	55,449	16,905

Staggered re-opening & limited content availability post re-opening has significantly impacted the revenue

Note: Above financial numbers are after excluding the impact of Ind AS 116 – ‘Leases’

Adjusted EBITDA = net profit after tax plus total tax expense, exceptional item, share of profit/(loss) of equity accounted investees (net of tax), finance costs and depreciation and amortization expense

Consolidated Result Summary – Q3, FY 20-21 vs Q3, FY 19-20

Particulars (INR Lacs)	Q3, FY 21			Q3, FY 20		
	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted
Total Income	32,013 ⁽¹⁾	25,674	6,339	92,389	0	92,389
Expenses ⁽³⁾	12,352	-4,865 ⁽²⁾	17,217	60,846	-12,704	73,550
Adjusted EBITDA ⁽⁴⁾	19,661	30,539	-10,878	31,543	12,704	18,839
Adjusted EBITDA Margin				34.1%		20.4%
Depreciation & Amortization	14,246	8,400	5,846	13,485	7,854	5,631
EBIT	5,415	22,139	-16,724	18,058	4,850	13,208
Finance Costs	12,706	8,684	4,022	12,210	8,293	3,917
PBT	-7,291	13,455	-20,746	5,833	-3,443	9,276
Corporate Tax	-2,370	4,702	-7,072	2,207	-1,183	3,390
Net Profit After Tax	-4,921	8,753	-13,674	3,626	-2,260	5,886
Net Profit After Tax Margin				3.9%		6.4%
Non-controlling interests	11		11	8		8
Net Profit After Tax after adjustment of non-controlling interests	-4,910	8,753	-13,663	3,634	-2,260	5,894
EPS - Basic (INR)	-8.21		-22.81	7.08		11.49
EPS - Diluted (INR)	-8.21		-22.81	7.05		11.44

1. Includes other income with respect to rental waivers received during the quarter.

2. Represents rental expense for properties; it includes notional rent of INR 9.6 Cr pertaining to deferred rent on security deposit as required under Ind AS

3. Expenses = Total Expenses -Finance Costs -Depreciation and Amortization expense

4. Adjusted EBITDA = net profit after tax plus total tax expense, exceptional item, share of profit/(loss) of equity accounted investees (net of tax), finance costs and depreciation and amortization expense

Consolidated Result Summary – 9M, FY 20-21 vs 9M, FY 19-20

Particulars (INR Lacs)	9M, FY 21			9M, FY 20		
	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted	Reported	Ind-AS 116 Impact	Ind-AS 116 Adjusted
Total Income	48,609 ⁽¹⁾	36,652	11,957	2,79,045	0	2,79,045
Expenses ⁽³⁾	37,674	-4,865 ⁽²⁾	42,539	1,86,537	-37,059	2,23,596
Adjusted EBITDA ⁽⁴⁾	10,935	41,517	-30,582	92,508	37,059	55,449
Adjusted EBITDA Margin				33.2%		19.9%
Depreciation & Amortization	42,885	25,178	17,707	40,023	22,917	17,106
EBIT	-31,950	16,339	-48,289	52,485	14,142	38,343
Finance Costs	37,394	26,334	11,060	36,466	24,501	11,965
PBT	-69,403	-9,994	-59,408	15,978	-10,359	26,337
Corporate Tax	-23,503	-3,492	-20,011	5,832	-3,600	9,432
Net Profit After Tax	-45,900	-6,502	-39,398	10,146	-6,759	16,905
Net Profit After Tax Margin				3.6%		6.1%
Non-controlling interests	33		33	33		33
Net Profit After Tax after adjustment of non-controlling interests	-45,867	-6,502	-39,365	10,179	-6,759	16,938
EPS - Basic (INR)	-85.06		-73.01	20.36		33.92
EPS - Diluted (INR)	-85.06		-73.01	20.25		33.74

1. Includes other income of INR 369 Cr with respect to rental waivers received till Dec 31, 2020

2. Represents rental expense for properties; it includes notional rent of INR 9.6 Cr pertaining to deferred rent on security deposit as required under Ind AS

3. Expenses = Total Expenses - Finance Costs - Depreciation and Amortization expense

4. Adjusted EBITDA = net profit after tax plus total tax expense, exceptional item, share of profit/(loss) of equity accounted investees (net of tax), finance costs and depreciation and amortization expense

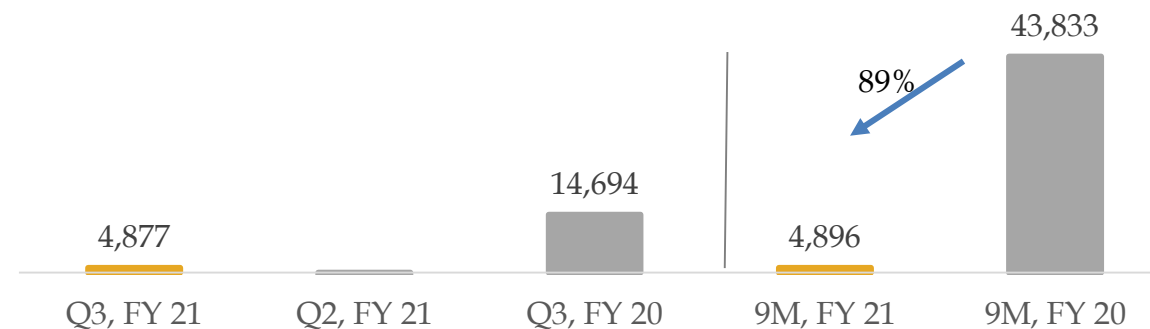


UPDATE ON NEGOTIATION WITH LANDLORDS

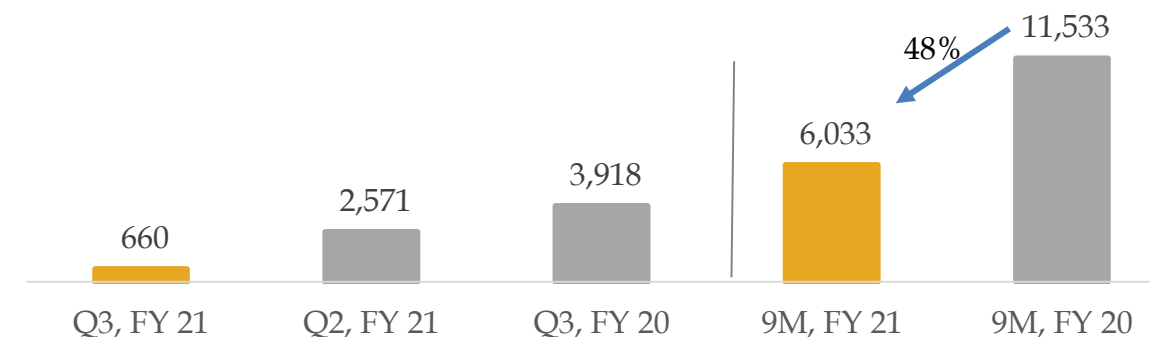
Adjusted RENT & CAM

- Settlements reached with Landlords for 88% of cinemas for complete or partial waiver / discounts for the lockdown period;
- Negotiated discounts/ rebates in the form of revenue share/ reduction in minimum guarantee post re-opening generally until March 31, 2021
- Discussions with balance Landlords in progress and expected to close in the near future.
- We are yet to re-open 56 screens in 13 cinemas, as of 15th January 2021, since certain rental negotiations are currently on-going with the mall developers, landlords, lessors and partners
- Adjusted rent expense does not include an amount of INR 32 Cr for rental waivers sought by the company for the lockdown period in case of properties where rental negotiations with landlords are not concluded.
- CAM Expenses for Q3, FY 21 lower on account of credit notes received from developers on final settlement

Adjusted Rent (INR Lacs)



CAM (INR Lacs)



Adjusted Rent & CAM expense for 9M, FY 21 is lower by INR 444 Cr as compared to 9M FY 20, a reduction of 80%



Financial Results & Analysis

Q3, FY20-21 vs Q3, FY19-20; 9M, FY20-21 vs 9M, FY19-20

Particulars	Q3, FY 21	Q3, FY 20	% Change	9M, FY 21	9M, FY 20	% Change
<u>Operating Numbers</u>						
Screens	835	821	2%	835	821	2%
Seats	1,78,994	1,78,063	1%	1,78,994	1,78,063	1%
Admits (Lacs)	10	259	-96%	10	822	-99%
ATP (In Rupees)#	164	210	-22%	166	204	-19%
SPH (In Rupees)^	95	100	-5%	97	100	-3%
<u>Financials (INR Lacs)</u>						
Income from sale of movie tickets	1,335	45,281	-97%	1,395	1,40,124	-99%
Sales of Food & Beverages *	1,402	24,741	-94%	1,910	78,356	-98%
Advertisement Income	422	12,195	-97%	422	30,734	-99%
Income from movie distribution	144	3,158	-95%	3,190	10,507	-70%
Other Income^^	3,036	7,014	-57%	5,040	19,324	-74%
Total Income	6,339	92,389	-93%	11,957	2,79,045	-96%

Staggered re-opening & limited content availability post re-opening has significantly impacted the revenue

Note: Above financial numbers are after excluding the impact of Ind AS 116 – ‘Leases’
* Sale of Food and Beverages represents sale of food and beverages and sale of other/traded goods.
Average Ticket Price = Gross Box Office Collection (gross collection from sale of movie tickets including applicable taxes)+3D Glasses Income / Admits
^ Spend Per Head = Gross Sale of Food and Beverages (gross sales from food and beverages including applicable taxes)/ Admits
^^ Other Income = Total Income – Income from sale of movie tickets – Sale of Food and Beverages – Advertisement Income – Income from movie Distribution

Fixed Expenditure Analysis (Consolidated)

Q3, FY20-21 vs Q3 FY19-20 vs Q2, FY20-21; 9M, FY20-21 vs 9M, FY19-20

Particulars (INR Lacs)	Q3, FY 21	Q3, FY 20	% Change	Q2, FY 21	% Change	9M, FY 21	9M, FY 20	% Change
Adjusted Rent^	4,877	14,694	-67%	0	NM	4,896	43,833	-89%
Common Area Maintenance	660	3,918	-83%	2,571	-74%	6,033	11,533	-48%
Employee Benefit Expense	4,858	10,674	-54%	4,069	19%	15,744	31,733	-50%
Electricity & Water Charges	1,470	5,084	-71%	838	75%	2,903	16,674	-83%
Other Expenses*	4,034	9,106	-56%	2,480	63%	9,033	27,887	-68%
Total	15,899	43,476	-63%	9,958	60%	38,609	1,31,660	-71%
Expenses Per Month#	5,273	14,492	-64%	3,288	60%	4,242	14,629	-71%

- Rent and CAM negotiations closed for 88% of properties (Refer Slide: 11 for details)
- Salary cuts for frontline staffs reversed in line with reopening of states; Pay cuts for Corporate and other staff being rolled back in a staggered manner
- Continued focus on keeping all other fixed expenses under check.

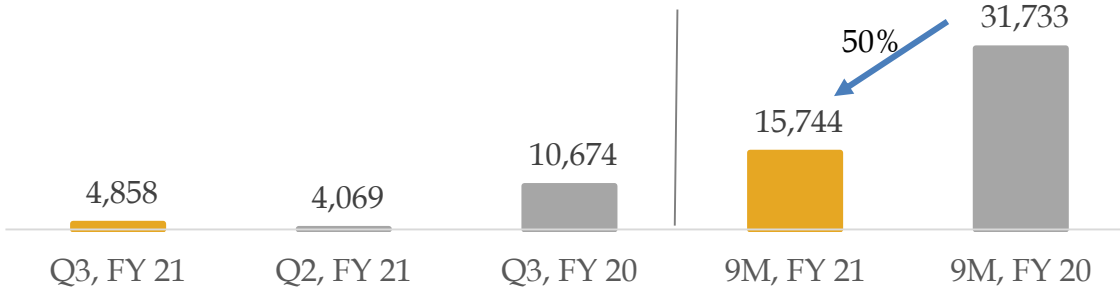
* Other Expenses = Total Expenses -Movie Exhibition Cost -Consumption of food and beverages -Employee Benefit Expenses -Rent -Common Area Maintenance -Electricity and Water Charges - Movie Production, Distribution And Print Charges

Expense per month = [Total Expenses - Movie Exhibition Cost - Consumption of food and beverages - Movie Production, Distribution And Print Charges - Inventory write Off]/number of months. one time inventory written off is Rs 81 Lac in Q3 FY21, and Rs 427 Lac in 9M, FY21

^ Adjusted Rent Expenses = Net Rent Expenses + Impact of Ind AS 116 Adjustment in Other Expenses

Note: Above financial numbers are after excluding the impact of Ind AS 116 - 'Leases'

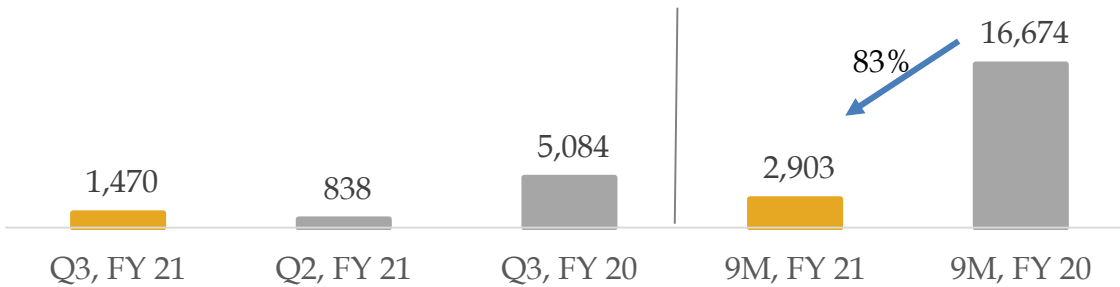
Personnel Expenses (INR Lacs)



Personnel Expenses:

- Salary Cuts for frontline staffs reversed in line with reopening of states; Pay cuts for Corporate and other staff being rolled back in a staggered manner
- As cinemas have re-opened personnel expenses have increased from INR 40.7 Cr in Q2 to INR 48.6 Cr in Q3
- For 9M, FY 21 the personnel expenses is lower by 50% as compared to 9M FY 20 and lower by 54% as against Q3, FY20

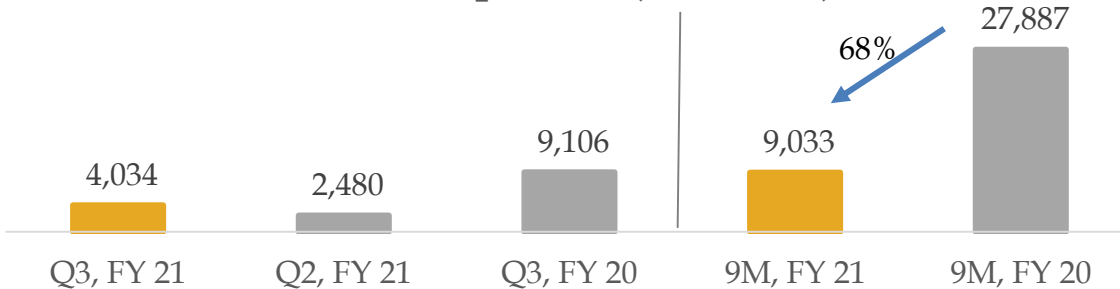
Electricity & Water Charges (INR Lacs)



Electricity & Water Charges

- For 9M, FY 21 expenses lower by 83% as compared to 9M FY 20 and lower by 71% as against Q3, FY20

Other Expenses (INR Lacs)



Other Expenses

- For 9M, FY 21 expenses lower by 68% as compared to 9M FY 20 and lower by 56% as against Q3, FY20.

Net Debt (INR Lacs)	December 31, 2020	March 31, 2020
Total Gross Debt	1,50,009	1,29,468
Cash & Cash Equivalents	37,256	32,347
Net Debt	1,12,753	97,121

Total Gross Debt represents long term borrowings including current maturities and short term borrowings and does not include lease liabilities. Cash and cash-like items represent investments (current), cash and cash equivalents (current) and other bank balances.

The Board of Directors of the company in its meeting held on 18th Dec 2020, subject to approval of the members of the company, approved the resolution to raise equity for an amount not exceeding INR 800 Cr.



MOVIE RELEASES IN Q3 FY21 AND CONTENT PIPELINE



As of 13th January 2021.

Given the current evolving situation around COVID-19, the release dates for all content slated for release in CY21 are yet to be finalized.

This information is based on public sources and is not exhaustive. The company has not independently verified this information.

MOVIE RELEASES IN Q3, FY 20-21

PVR



SURAJ PE MANGAL BHARI

CAST

Manoj Bajpayee,
Diljit Dosanjh,
Fatima Sana Shaikh

DIRECTOR

Abhishek Sharma



INDOO KI JAWANI

CAST

Kiara Advani,
Aditya Seal,
Rakesh Bedi

DIRECTOR

Abir Sengupta



TENET

CAST

John David Washington,
Robert Pattinson,
Elizabeth Debicki

DIRECTOR

Christopher Nolan



WONDER WOMAN 1984

CAST

Gal Gadot,
Chris Pine,
Kristen Wiig

DIRECTOR

Patty Jenkins



SOLO BRATHUKE SO BETTER [TELUGU]

CAST

Ajay,
Vennela Kishore,
Kalyani N.

DIRECTOR

Subbu



BISKOTH [TAMIL]

CAST

Anandraj,
K. Bujji Babu,
Krithika Bala

DIRECTOR

R. Kannan



DRACULA SIR [BENGALI]

CAST

Anirban Bhattacharya,
Bidipta Chakraborty,
Mimi Chakraborty

DIRECTOR

Debaloy Bhattacharya



IRANDAM KUTHTHU [TAMIL]

CAST

Santhosh P. Jayakumar,
Daniel Annie Pope,
Karishma Kaul

DIRECTOR

Santhosh P. Jayakumar

Staggered re-opening of Cinemas across the country, with 50% capacity cap, saw limited movie releases

I BOLLYWOOD CONTENT PIPELINE

BOLLYWOOD CONTENT PIPELINE (1/3)

PVR



SOORYAVANSHI

CAST
Akshay Kumar,
Katrina Kaif,
Anupam Kher

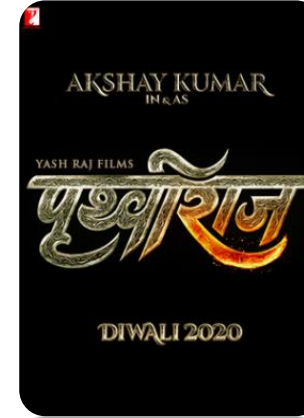
DIRECTOR
Rohit Shetty



83

CAST
Ranveer Singh,
Deepika Padukone

DIRECTOR
Kabir Khan



PRITHVIRAJ

CAST
Akshay Kumar,
Manushi Chhillar

DIRECTOR
Chandraprakash Dwivedi



ATRANGI RE

CAST
Akshay Kumar,
Dhanush, Sara Ali

DIRECTOR
Aanand L. Rai



LAL SINGH CHADDHA

CAST
Aamir Khan,
Kareena Kapoor

DIRECTOR
Advait Chandan



RADHE

CAST
Salman Khan,
Disha Patani

DIRECTOR
Prabhu Deva



PATHAN

CAST
Shah Rukh Khan,
John Abraham

DIRECTOR
Siddharth Anand



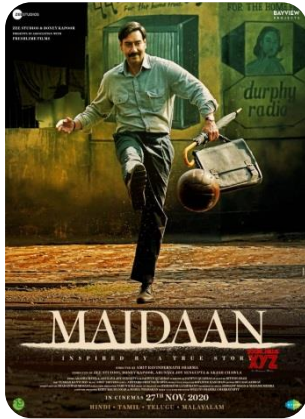
JERSEY

CAST
Shahid Kapoor,
Mrunal Thakur,
Pankaj Kapur

DIRECTOR
Gowtam Tinnanuri

BOLLYWOOD CONTENT PIPELINE (2/3)

PVR



MAIDAAN

CAST

Ajay Devgn,
Priyamani

DIRECTOR

Amit Sharma



BELL BOTTOM

CAST

Akshay Kumar;
Vaani Kapoor

DIRECTOR

Ranjit M Tewari



JAYESHBHAI JORDAAR

CAST

Ranveer Singh; ,
Shalini Pandey

DIRECTOR

Divyang Thakkar



BRAHMASTRA

CAST

Ranbir Kapoor,
Alia Bhatt,
Amitabh Bachchan

DIRECTOR

Ayan Mukerji



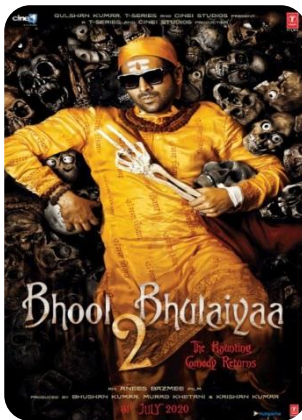
SATYAMEVA JAYATE 2

CAST

John Abraham,
Divya Khosla Kumar

DIRECTOR

Milap Zaveri



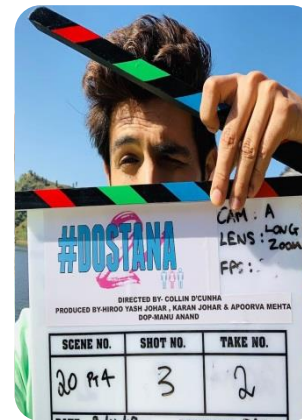
BHOOOL BHULAIYAA 2

CAST

Kartik Aaryan,
Kiara Advani,
Tabu

DIRECTOR

Anees Bazmee



DOSTANA 2

CAST

Kartik Aaryan,
Janhvi Kapoor,
Laksh Lalwani

DIRECTOR

Collin D'Cunha



BADHAAI DO

CAST

Rajkummar Rao,
Bhumi Pednekar

DIRECTOR

Amit Sharma

BOLLYWOOD CONTENT PIPELINE (3/3)

PVR

ANTIM: THE FINAL TRUTH

CAST

Salman Khan,
Jisshu Sengupta,
Aayush Sharma

DIRECTOR

Mahesh Manjrekar

SARDAR UDHAM SINGH

CAST

Vicky Kaushal

DIRECTOR

Shoojit Sircar

GANAPATH

CAST

Tiger Shroff

DIRECTOR

Vikas Bahl

HERO PANTI 2

CAST

Tiger Shroff

DIRECTOR

Ahmed Khan

MISSION MAJNU

CAST

Siddharth Malhotra

DIRECTOR

Shantanu Bagchi

TOOFAN

CAST

Farhan Akhtar

DIRECTOR

Rakesh Om Prakash Sharma

GANGUBAI

KATHIAWADI

CAST

Alia Bhatt

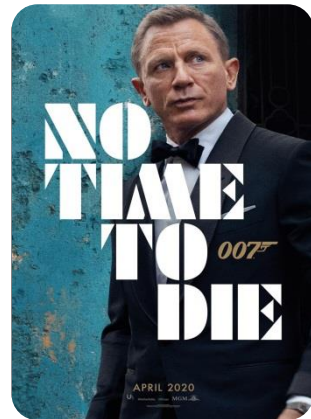
DIRECTOR

Sanjay Leela Bansali

I HOLLYWOOD CONTENT PIPELINE

HOLLYWOOD CONTENT PIPELINE (1/3)

PVR



NO TIME TO DIE

CAST

Daniel Craig,
Ana de Armas,
Rami Malek

DIRECTOR

Cary Joji Fukunaga



PETER RABBIT 2

CAST

James Corden,
Elizabeth Debicki,
Lennie James

DIRECTOR

Will Gluck



F9

CAST

Vin Diesel,
Michelle Rodriguez,
Charlize Theron

DIRECTOR

Justin Lin



A QUIET PLACE II

CAST

Emily Blunt,
Millicent Simmonds,
Cillian Murphy

DIRECTOR

John Krasinski



BLACK WIDOW

CAST

Scarlett Johansson,
Florence Pugh,
David Harbour

DIRECTOR

Cate Shortland



GODZILLA VS KONG

CAST

Millie Bobby Brown,
Alexander Skarsgård,
Eiza González

DIRECTOR

Adam Wingard



FREE GUY

CAST

Taika Waititi,
Ryan Reynolds,
Jodie Comer

DIRECTOR

Shawn Levy



TOP GUN : MAVERICK

CAST

Tom Cruise,
Jennifer Connelly,
Miles Teller

DIRECTOR

Joseph Kosinski

HOLLYWOOD CONTENT PIPELINE (2/3)

PVR

MORTAL KOMBAT

CAST
Jessica McNamee,
Hiroyuki Sanada,
Joe Taslim

DIRECTOR
Simon McQuoid

THE CONJURING THE DEVIL MADE ME DO IT

THE CONJURING : THE DEVIL MADE ME DO IT

CAST
Vera Farmiga,
Patrick Wilson,
Julian Hilliard

DIRECTOR
Michael Chaves



GHOSTBUSTERS AFTER LIFE

CAST
Finn Wolfhard,
Mckenna Grace,
Carrie Coon

DIRECTOR
Jason Reitman



VENOM: LET THERE BE CARNAGE

CAST
Tom Hardy,
Michelle Williams,
Woody Harrelson

DIRECTOR
Andy Serkis

CRUELLA

CAST
Emma Stone,
Paul Walter Hauser,
Emma Thompson

DIRECTOR
Craig Gillespie



MINIONS: THE RISE OF GRU

CAST
Julie Andrews,
Steve Carell,
Lucy Lawless

DIRECTOR
Kyle Balda,
Brad Ableson



JUNGLE CRUISE

CAST
Emily Blunt,
Dwayne Johnson,
Jesse Plemons

DIRECTOR
Jaume Collet-Serra



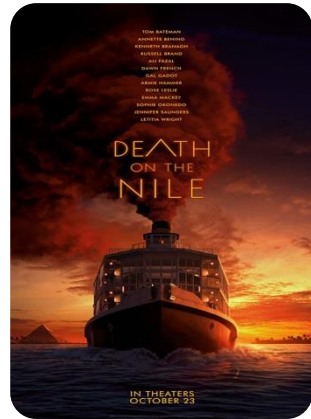
THE SUICIDE SQUAD 2

CAST
Margot Robbie,
Taika Waititi,
Alice Braga

DIRECTOR
James Gunn

HOLLYWOOD CONTENT PIPELINE (3/3)

PVR



DEATH ON THE NILE

CAST

Gal Gadot,
Emma Mackey,
Kenneth Branagh

DIRECTOR

Kenneth Branagh



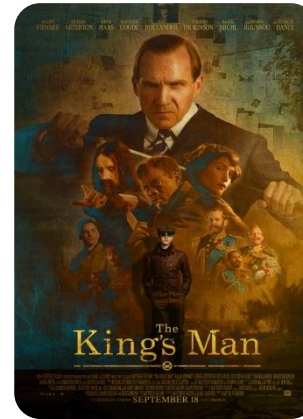
THE BOSS BABY : FAMILY BUSINESS

CAST

Alec Baldwin,
John Flanagan,
James McGrath

DIRECTOR

Tom McGrath



THE KING'S MAN

CAST

Matthew Goode,
Gemma Arterton,
Aaron Taylor-Johnson

DIRECTOR

Matthew Vaughn



THE TOMORROW WAR

CAST

Yvonne Strahovski,
Betty Gilpin,
Chris Pratt

DIRECTOR

Chris McKay



BLACK ADAM

CAST

Dwayne Johnson,
Sarah Shahi,
Aldis Hodge

DIRECTOR

Jaume Collet-Serra



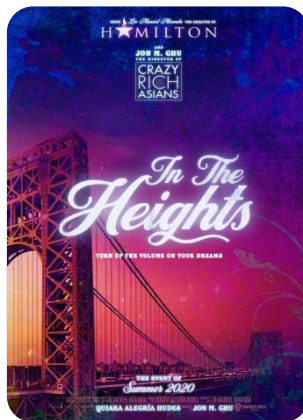
DOCTOR STRANGE IN THE MULTIVERSE OF MADNESS

CAST

Elizabeth Olsen,
Rachel McAdams,
Benedict Cumberbatch

DIRECTOR

Sam Raimi



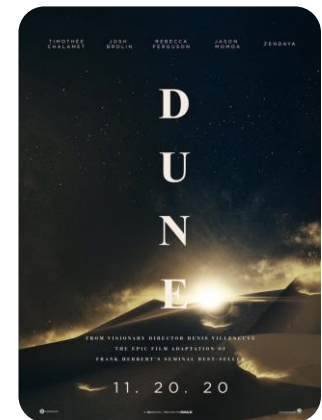
IN THE HEIGHTS

CAST

Lin-Manuel Miranda,
Stephanie Beatriz,
Anthony Ramos

DIRECTOR

Jon M. Chu



DUNE

CAST

Zendaya,
Rebecca Ferguson,
Timothée Chalamet

DIRECTOR

Denis Villeneuve

I REGIONAL CONTENT PIPELINE

REGIONAL CONTENT PIPELINE (1/2)

PVR



DOCTOR
[TAMIL]

CAST
Sivakarthikeyan,
Priyanka Arul Mohan,
inay

DIRECTOR
Nelson Dilipkumar



COBRA
[TAMIL]

CAST
Vikram,
Srinidhi Shetty,
Irfan Pathan

DIRECTOR
R. Ajay Gnanamuthu



JAGAME THANTHIRAM
[TAMIL]

CAST
James Cosmo,
Dhanush,
Decca Heggie

DIRECTOR
Karthik Subbaraj



ANNAATTHE
[TAMIL]

CAST
Rajinikanth,
Prakash Raj

DIRECTOR
Siva



VALIMAI
[TAMIL]

CAST
Ajith Kumar
Huma Qureshi

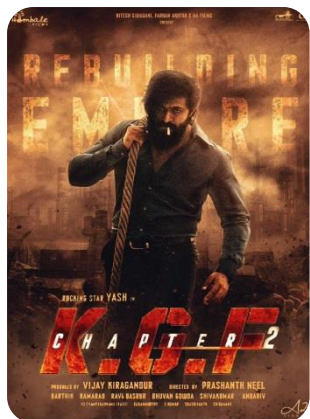
DIRECTOR
H. Vinoth



RRR
[TELUGU]

CAST
N.T. Rama Rao Jr.,
Ram Charan,
Ajay Devgn

DIRECTOR
S.S. Rajamouli



K.G.F: CHAPTER 2
[KANNADA]

CAST
Yash,
Sanjay Dutt,
Srinidhi Shetty

DIRECTOR
Prashanth Neel



RADHE SHYAM
[TELUGU]

CAST
Prabhas,
Pooja Hegde,
Kunaal Roy Kapur

DIRECTOR
K.K. Radhakrishna Kumar

REGIONAL CONTENT PIPELINE (2/2)

PVR



PUSHPA
[TELUGU]

CAST
Allu Arjun,
Vijay Sethupathi,
Rashmika Mandanna

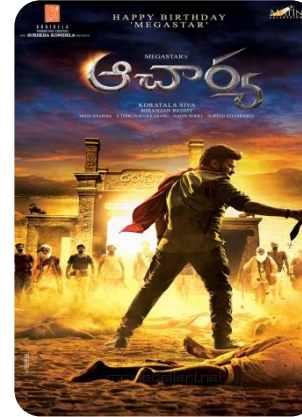
DIRECTOR
Sukumar



VAKEELSAAB
[TELUGU]

CAST
Prakash Raj,
Nivetha Thomas,
Pawan Kalyan

DIRECTOR
Venu Sriram



ACHARYA
[TELUGU]

CAST
Ram Charan,
Kajal Aggarwal,
Chiranjeevi

DIRECTOR
Koratala Siva



SARKARU VARI PATTU
[TELUGU]

CAST
Mahesh Babu,
Keerthy Suresh

DIRECTOR
Parasuram



POGARU
[KANNADA]

CAST
Dhruva Sarja, Rashmika
Mandanna

DIRECTOR
Nanda Kishore



ROBERT
[KANNADA]

CAST
Jagapathi Babu,
Darshan Thoogudeep,
Asha Bhat

DIRECTOR
Tarun Sudhir



KOTIGOBBA 3
[KANNADA]

Cast
Madonna Sebastian,, Kicha
Sudeep, Shraddha Das

DIRECTOR
Shiva Karthik



MARAKKAR
[MALAYALAM]

CAST
Mohanlal,
Sunil Shetty,
Arjun Sarja

DIRECTOR
Priyadarshan



Thank You



**For any queries please contact investor relations team:
Email ID: investorrelations@pvrcinemas.com**