

Phoenix Palassio, Lucknow  
GLA: ~0.9 msft  
Launched on 8th July 2020



The Phoenix Mills Ltd.

115<sup>th</sup> AGM Presentation

Rendered Image. Plans, design and design elements are subject to change  
GLA is an estimate based on current plans and market/company norms and is subject to change based on changes in development plans and tenant negotiations.



- **Who We Are**
- **Parameters of Growth in EBITDA and portfolio**
  1. **Organic Growth**
  2. **Growth from Brownfield Acquisition**
  3. **Growth from New Build**
  4. **Growth from CPPIB JV**
  5. **Case Study – Pune**
  6. **Growth from Densification / Expansion**
  7. **Office Expansion**
- **Cash flows from Residential Business**
- **Advantage Phoenix**
- **Phoenix Nhance App and Omni- Channel**





# India's largest mall owner showing >13% rental CAGR FY13 through FY20

Total of ~12 msft mall GLA expected to be operational by FY24

~7 msft

GLA across 9 operational  
RETAIL malls in 6 cities

GLA of  
under-development &  
under-planning RETAIL

~5 msft

>100%

EBITDA margin  
in Retail Malls

Leased occupancy  
Across HSP and  
MarketCity malls

~98%

14%

Rental CAGR  
During FY13-FY20

Consumption CAGR  
During FY13-FY20

15%



Note: Under development and under planning assets are subject to change and carry risks of planning, approvals, execution and market conditions which may be beyond the control of the Company. GLA is an estimate based on current plans and market/company norms and is subject to change based on changes in development plans and tenant negotiations. Data as on 30 June 2020. Rental and Consumption CAGR adjusted for the for the period for which the mall was operational. EBITDA Margin > 100% is in most months on aggregate for the portfolio and is derived at the asset level before corporate costs and other non operating costs.



# Dynamic and diverse leading developer of mixed-use projects

## Retail

**Operational  
Retail Spaces GLA**

~7  
msft

**Under-development &  
Under-planning  
Retail GLA**

~5  
msft

**Total  
~12 msft**

## Commercial

**Operational  
Office Spaces GLA**

~1.3  
msft

**Under-development &  
Under-planning  
Offices GLA**

~4.9  
msft

**Total  
~6.2 msft**

## Hospitality

**The St. Regis, Mumbai  
+ Courtyard by Marriott, Agra**

588  
keys

**Under-planning  
Grand Hyatt, Bangalore**

~300  
keys

**Total  
~888 keys**

## Residential

**Total Saleable  
Area**

~4  
msft

**Completed Area  
(OC Received)**

~3  
msft

**Total  
~4 msft**

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Grand Hyatt term sheet executed, definitive documentation underway. Data as on 30 June 2020



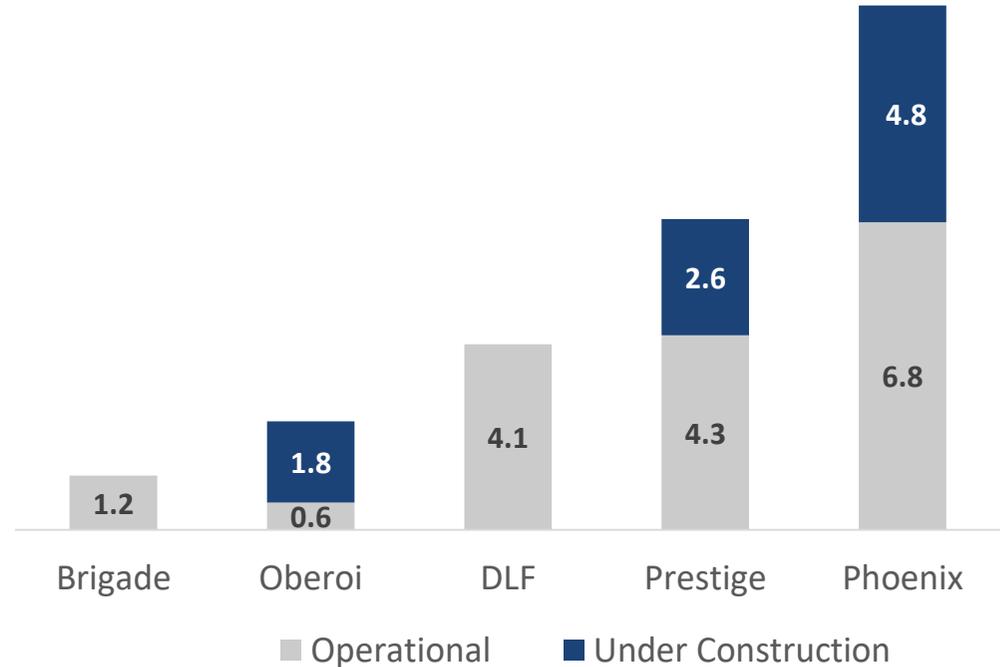
# Owner and Manager of India's Largest Portfolio

Largest Owner of Operational Retail Malls In India

Largest under development mall portfolio  
as on date

Presence across key Indian cities

Operational and Under Construction Retail GLA  
(msft) for Listed Developers in India



Source: Data is from Company Annual Reports / Corporate Presentations and Industry Reports.

Under Construction GLA for Phoenix includes the under planning retail GLA

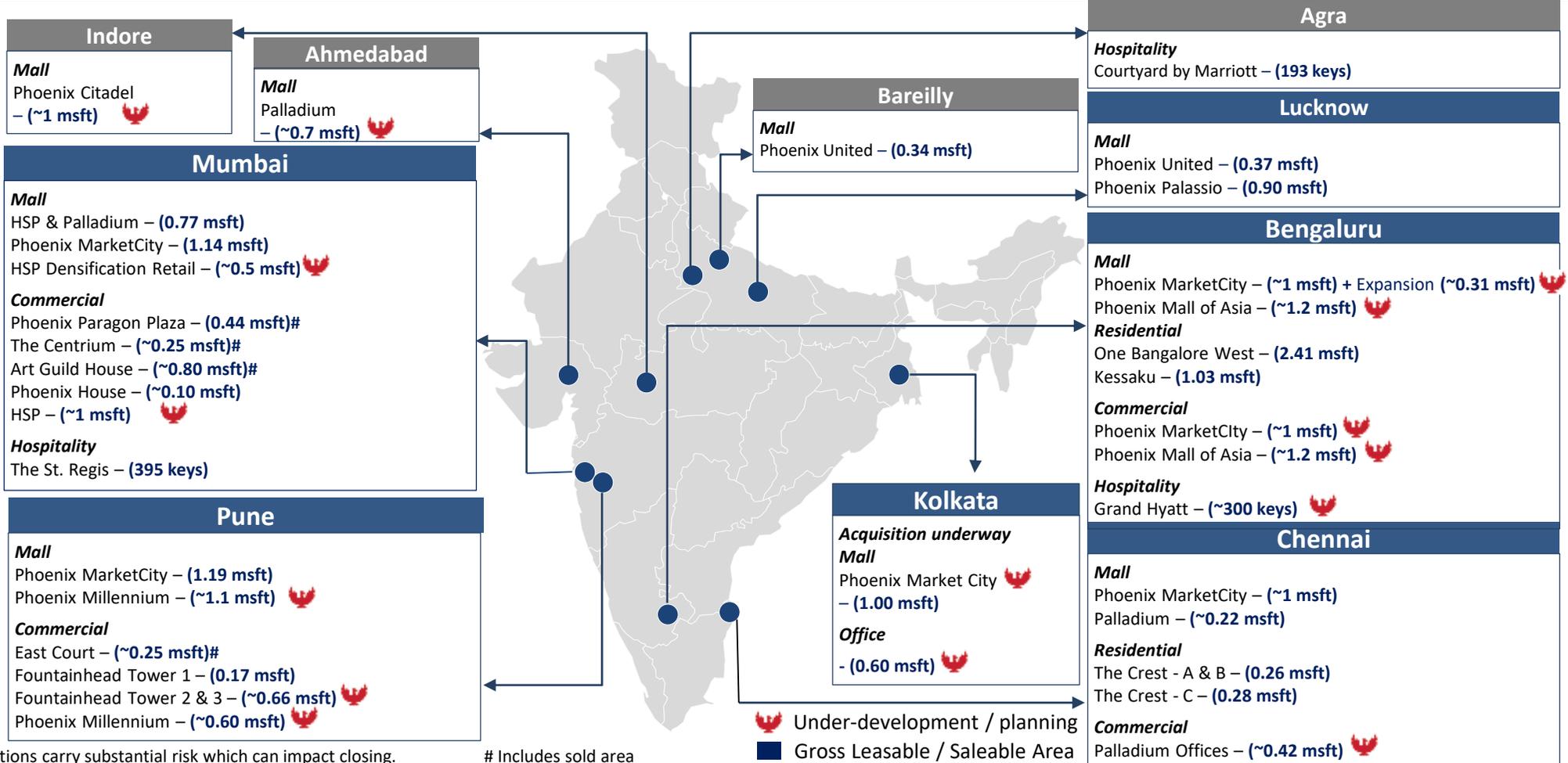
GLA is an estimate based on current plans and market/company norms and is subject to change based on changes in development plans and tenant negotiations.

Leased occupancy is as on 30 June 2020. Rental and Consumption CAGR adjusted for the for the period for which the mall was operational.

Under development and under planning assets are subject to change and carry risks of planning, approvals, execution and market conditions which may be beyond the control of the Company.



# Portfolio in India's top cities



Acquisitions carry substantial risk which can impact closing.

# Includes sold area

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# New Town Centre – The MarketCity concept



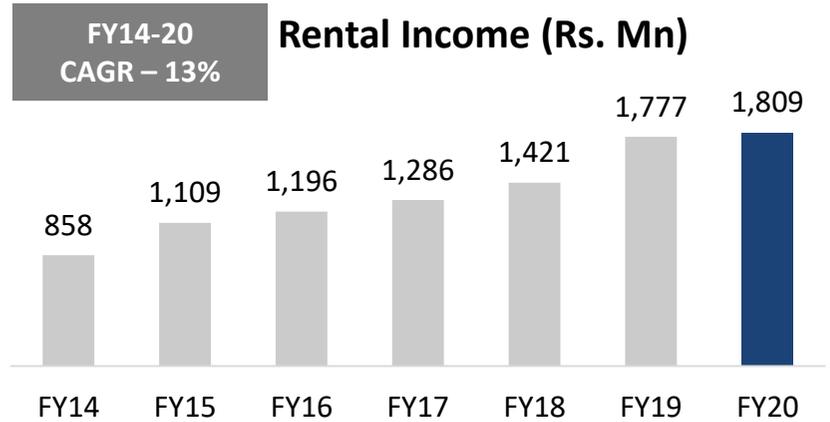
Data as on 30 June 2020.

Commercial Offices under planning and development subject to change and carry risks of planning, approvals, execution and market conditions which may be beyond the control of the Company.

GLA is an estimate based on current plans and market/company norms and is subject to change based on changes in development plans and tenant negotiations.



# Phoenix MarketCity and Palladium, Chennai



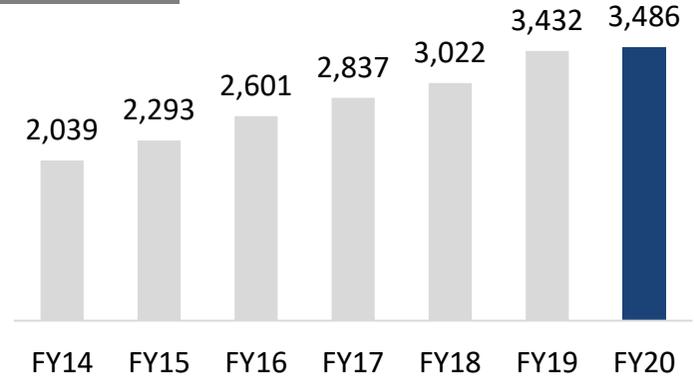


# HSP & Palladium, Mumbai



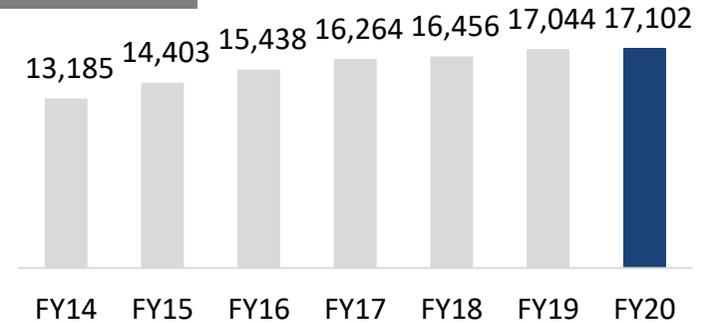
FY14-20  
CAGR – 9%

## Rental Income (Rs. Mn)



FY14-20  
CAGR – 4%

## Consumption (Rs. Mn)





# A Leading Developer of Mixed Use Projects

## Phoenix MarketCity, Mumbai

Centrium

Phoenix Paragon Plaza

Art Guild House

Asset Class	GLA (msft)
Retail	~1.14
Office	~1.52
Parking	~1.2
Total	~3.86



# Phoenix MarketCity, Bangalore

~1.0 msft  
Gross Leasable Area

~97%  
FY20 Occupancy

Rs. 13,140 Million  
FY20 Consumption

Rs. 1,795 pspm  
FY20 Trading Density



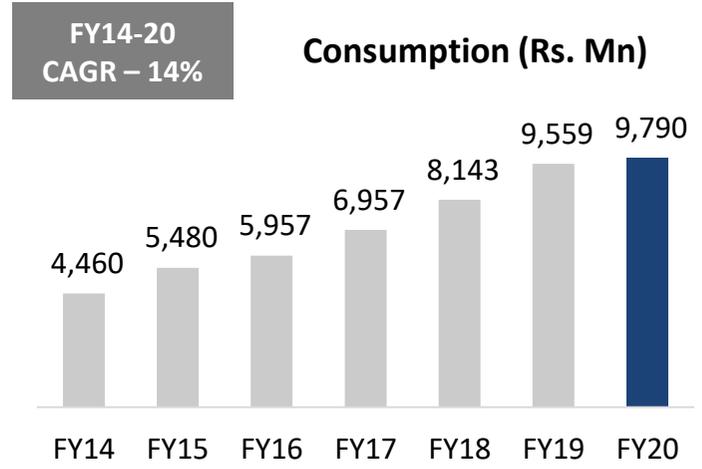
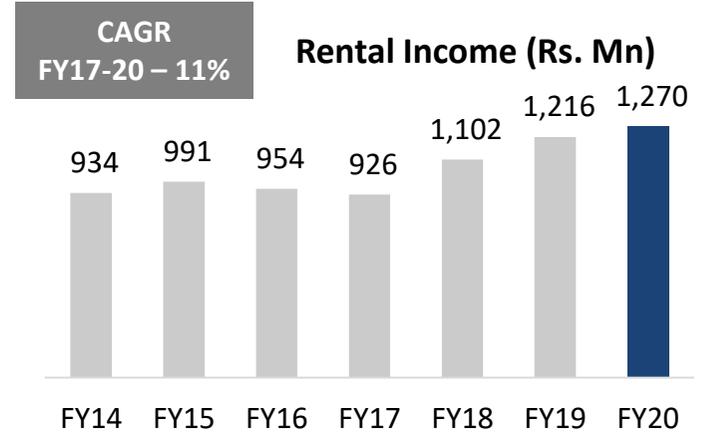
Photo shot at location



# Phoenix MarketCity, Mumbai



Photo shot at location



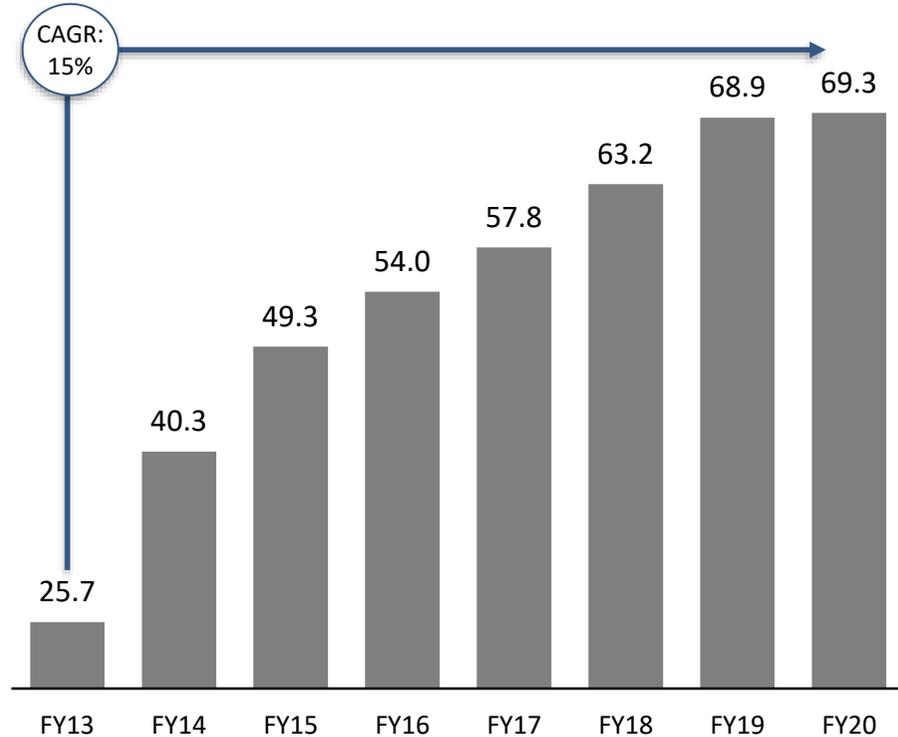
Erstwhile weaker mall in portfolio till FY2017; has exhibited strong growth since



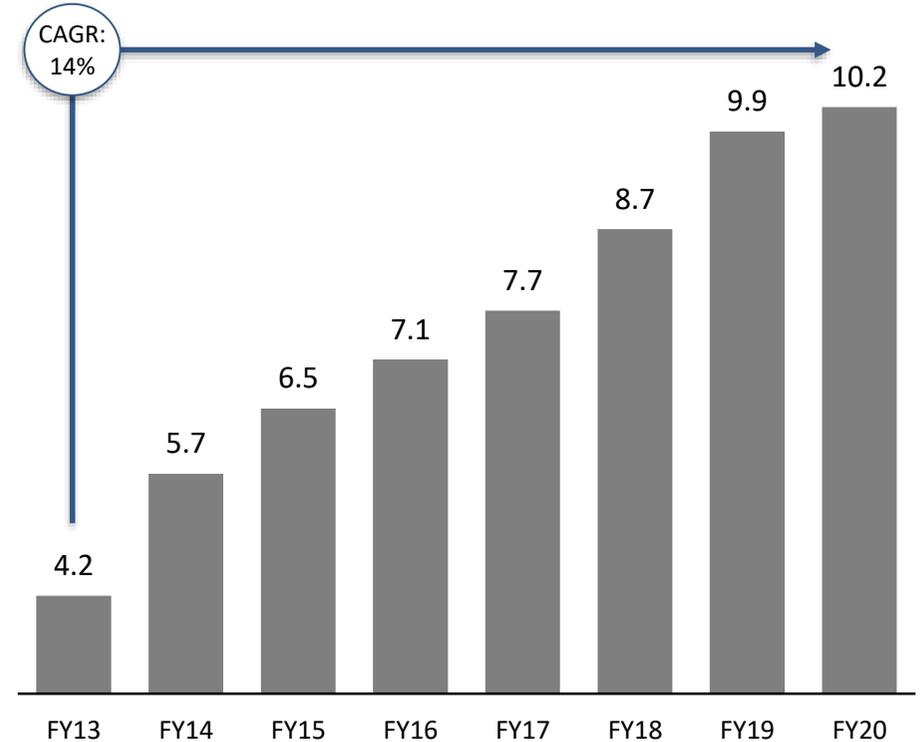
# Consumption & Rentals 15% & 14% CAGR FY13 through FY20

Company may consider options to monetise; including through a REIT

Mall consumption (Rs. bn)



Mall rentals (Rs. bn)





# Brownfield Acquisitions

Photo shot at location



**Phoenix Palassio, Lucknow**  
Possession in August 2018  
**Completed construction and opened to public in less than 24 months**

Photo shot at location



**Phoenix Citadel, Indore**  
Acquisition in July 2018



Rendered Image. Plans, design and design elements are subject to change





# Phoenix Palassio, Lucknow — West Entrance with Spectacular Musical Fountain

0.90 msft  
Gross Leasable  
Area

~Rs. 3.3 bn of  
equity infused  
from internal  
accruals

Construction  
cost per sq. ft. of  
~Rs. 2,500

Mall leased  
~90%+ basis  
LOIs executed



Rendered Image. Plans, design and design elements are subject to change



# Expansive Spaces... Opulent Interiors... Breathtaking Chandeliers



Rendered Image. Plans, design and design elements are subject to change.



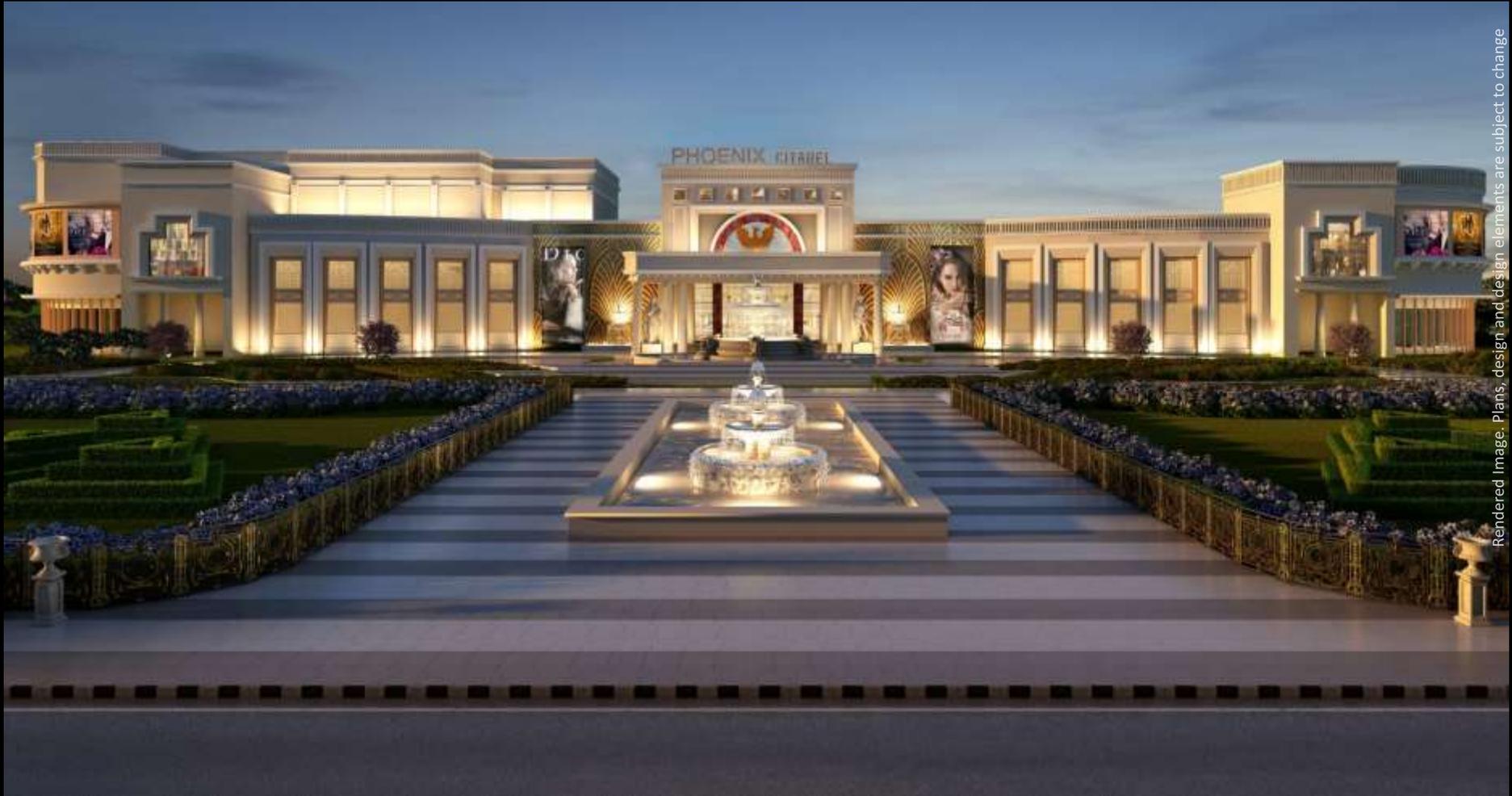
Photo shot at location



Photo shot at location



# Phoenix Citadel, Indore — Is it an Architectural Marvel?



Rendered Image. Plans, design and design elements are subject to change



## Phoenix Citadel, Indore — Tuscany Street: Reflecting classical hues of Florence



Rendered Image. Plans, design and design elements are subject to change

Interior design inspired by the beauty of Italy

Brownfield asset acquired in auction at ~Rs. 2,100 per sq. ft.

Expected to start operations in FY22 at estimated cost of ~Rs. 3,500 per sq. ft.

Strong leasing traction witnessed



# Phoenix Citadel — Opulent Grand Arrivals, Venetian inspired Chandeliers & Glasswork



Rendered Image. Plans, design and design elements are subject to change

Skylit arrival atrium with grand fountain



Rendered Image. Plans, design and design elements are subject to change

Venice Street View



## Palladium Ahmedabad — Ahmedabad's very own Luxury mall

**0.70 msft  
Gross Leasable Area**



Rendered Image. Plans, design and design elements are subject to change

Gross leasable area is an estimate based on current plans and market/company norms and is subject to change based on changes in development plans and tenant negotiations.



# Palladium Ahmedabad — Timeless Luxury



Rendered Image. Plans, design and design elements are subject to change.



# Palladium Ahmedabad — Modernity and Sophistication



Rendered Image. Plans, design and design elements are subject to change.



# PML CPPIB Alliance — Paved path for the next leg of growth



THE PHOENIX  
MILLS LIMITED



CPP  
INVESTMENT  
BOARD





# One Brownfield and Two Greenfield Acquisitions

Quick commitment of equity money. Zero debt drawn in these SPVs as on date

	Phoenix Millennium	Phoenix Mall of Asia	Phoenix Citadel
Proposed Retail and Office GLA	Retail GLA - ~1.1 msft Office GLA - ~0.6 msft	Retail GLA - ~1.2 msft Office GLA - ~1.2 msft	Retail GLA - ~1 msft
Equity* invested till 30 <sup>th</sup> June 2020	~Rs. 5.2 bn	~Rs. 8.6 bn	~Rs. 3.5 bn
Status update	 Photo shot at location	 Photo shot at location	 Photo shot at location
Expected year of operation	FY2024	FY2024	FY2022

Data is as on 30 June 2020

\* Equity invested is by Island Star Mall Developers Pvt. Ltd. in the form of equity, ICD, OFCD or other similar instruments

Development timelines and costs carry risks of planning, approvals, execution and market conditions which may be beyond the control of the Company.

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# Phoenix Mall of Asia, Bangalore

Retail GLA ~1.2 msft  
under construction

Office GLA ~1.2 msft  
under planning

Prime parcel in  
Hebbal of ~13 acres



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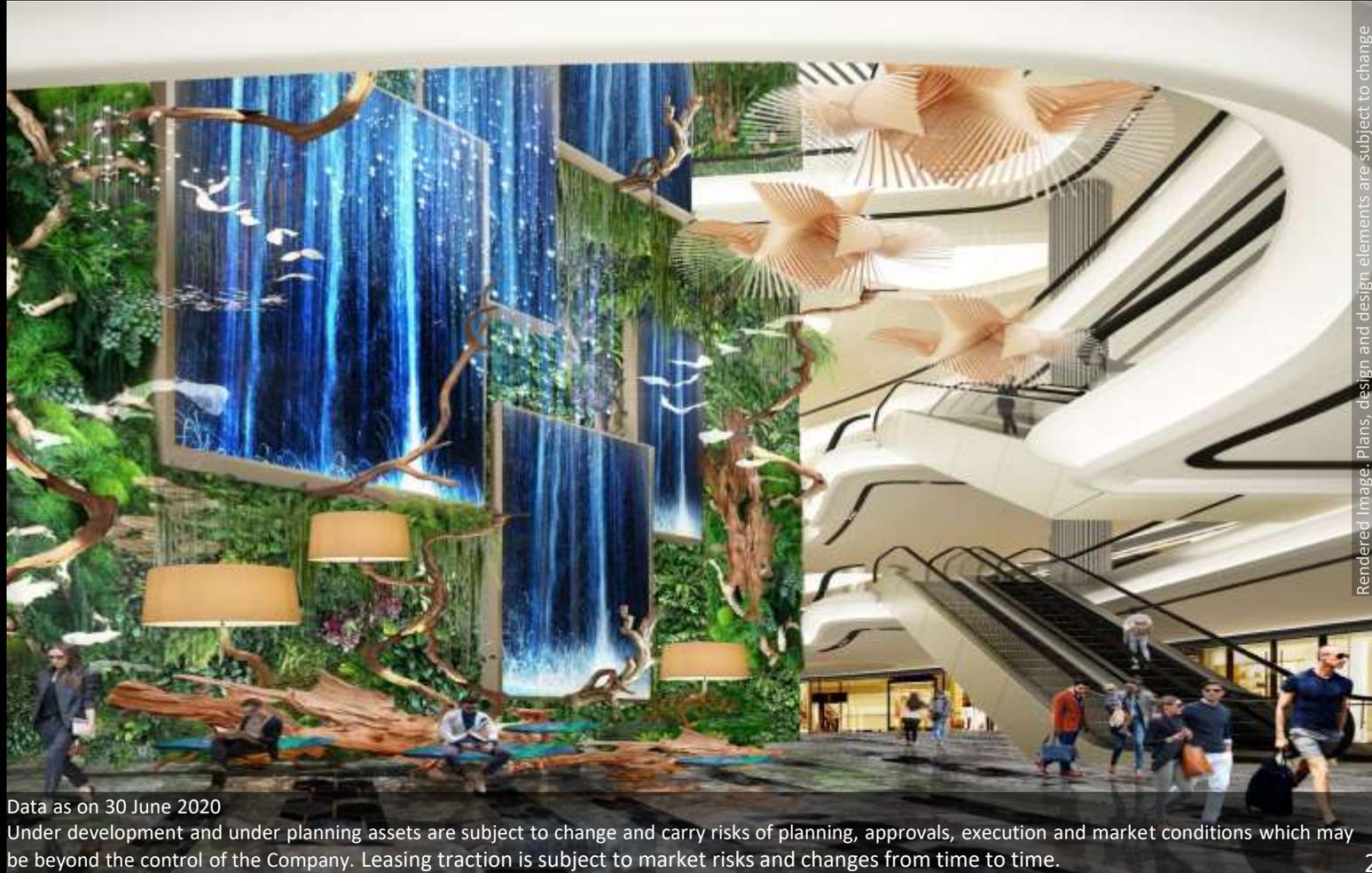
## Mall of Asia, Bangalore — Arrival at Ground Floor into Eden Arcadia

Equity infused  
~Rs. 8.6 bn

No debt on the  
project on date

Expected to be  
Operational in FY24

Strong leasing traction



Data as on 30 June 2020

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Rendered Image. Plans, design and design elements are subject to change.

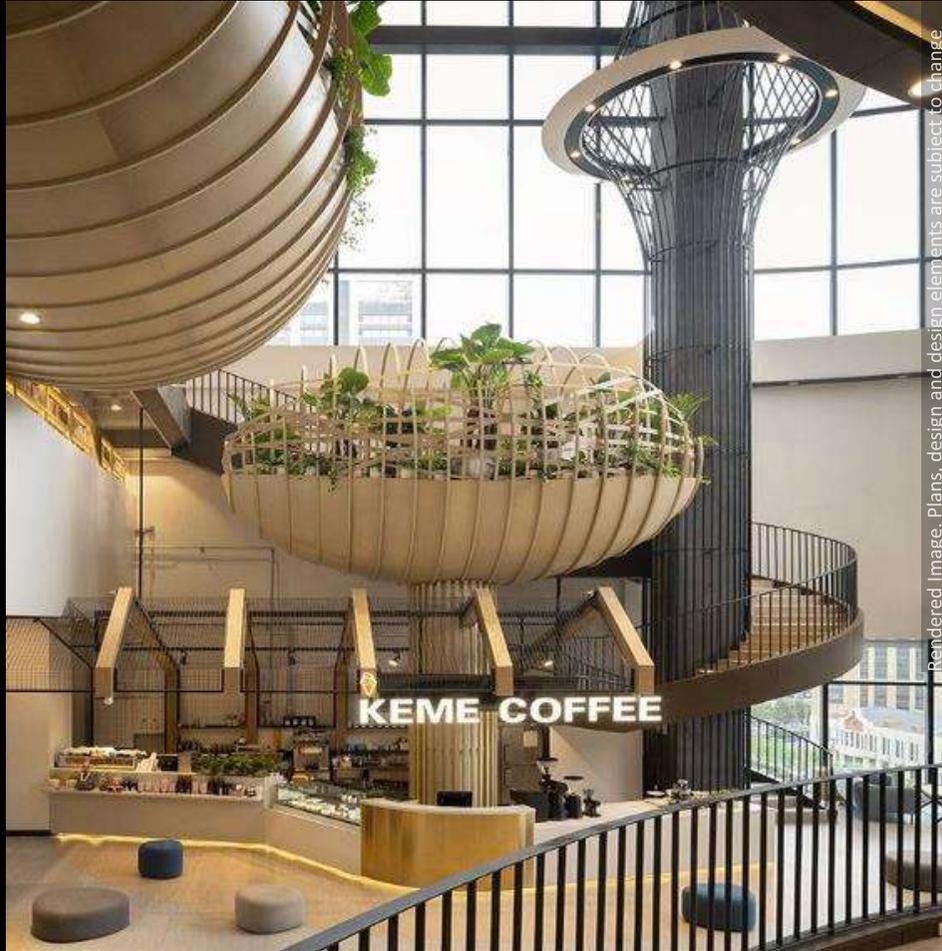


## Mall of Asia, Bangalore — A 15 screen multiplex





## Mall of Asia, Bangalore — Tiered atrium with cafes and restaurants



Rendered Image. Plans, design and design elements are subject to change



Rendered Image. Plans, design and design elements are subject to change



# Phoenix MILLENNIUM

Retail GLA ~1.1 msft  
under construction

Office GLA ~0.6 msft  
under planning

Prime parcel in  
Wakad of ~13 acres



GLA is an estimate based on current plans and market/company norms and is subject to change based on changes in development plans and tenant negotiation 31

Rendered Image. Plans, design and design elements are subject to change



# Phoenix Millennium, Pune — Plaza Flourish, the gateway to luxury

Equity infused  
~Rs. 5.2 bn

No debt on the  
project on date

Expected to be  
Operational in FY24



Data as on 30 June 2020

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Rendered Image. Plans, design and design elements are subject to change



# Phoenix Millennium, Pune — Rains of Nourish, 2nd floor grand entry



Rendered Image. Plans, design and design elements are subject to change



# Growth by Densification

Phoenix MarketCity Bangalore



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# Case Study – Densification and Organic Growth

Phoenix MarketCity Pune

Photo shot at location



**~1.2 msft**  
**Gross Leasable Area**

**~96%**  
**FY20 Occupancy**

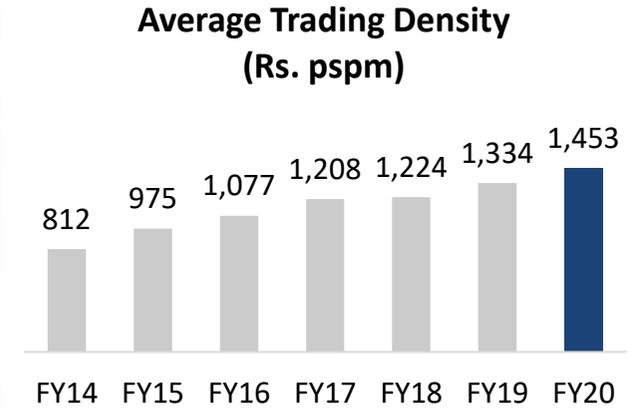
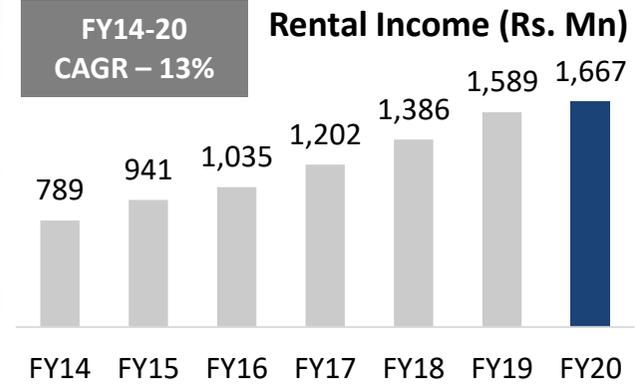
**Rs. 12,592 Million**  
**FY20 Consumption**

**Rs. 1,453 pspm**  
**FY20 Trading Density**

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Photo shot at location





# Phoenix MarketCity, Pune – Grand Interiors and Large Space at Liberty Square

Photo shot at location



**Grand Interiors**

Photo shot at location

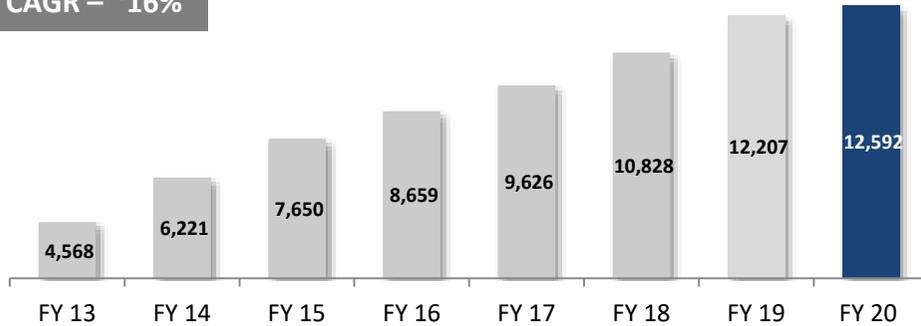


**Events at Liberty Square**



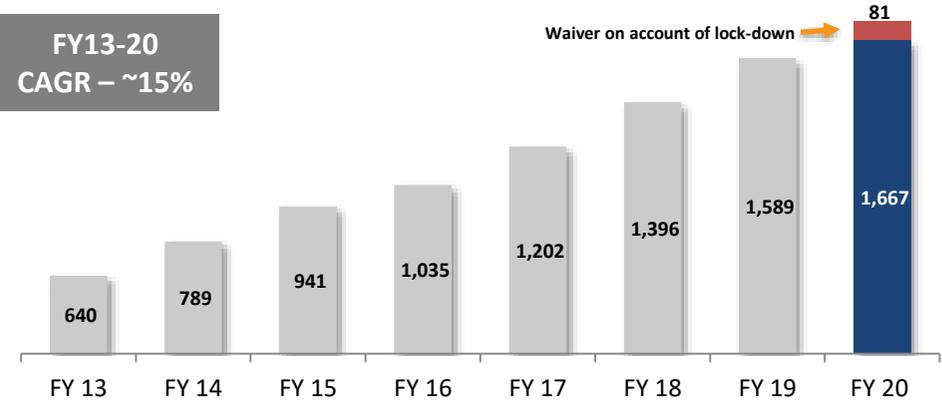
## Consistent Growth in Consumption (Rs. Mn)

FY13-20  
CAGR – ~16%



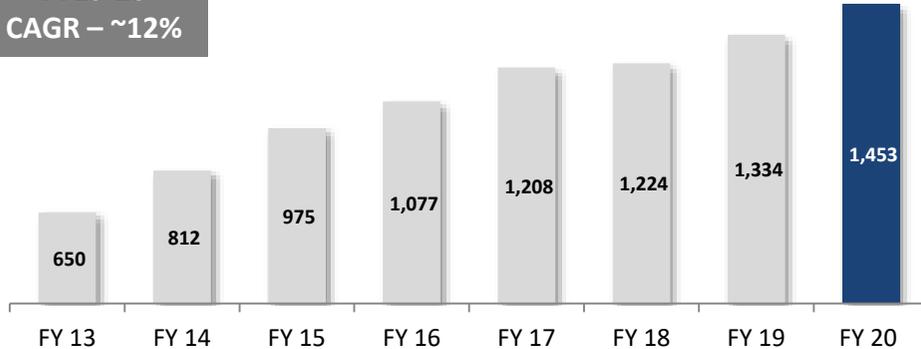
## High Rental Yield (Rs. Mn)

FY13-20  
CAGR – ~15%



## Consistent Growth in Average Trading Density (Rs. pspm)

FY13-20  
CAGR – ~12%





Consumption grew at a CAGR of 16% over the last 7 years (FY13 to FY20)

PMC Pune following the growth trajectory of HSP and Palladium which has witnessed Rs. 3,000+ pspm trading density

As trading density grows, store profitability increases; retailer can afford to pay more rent

Mall in very affluent part of the city

Customers from the city gravitate to this mall which has become a consumption hub

Sizeable catchment of residential and office in micro market and growing

## Highly sought-after brands with limited presence in Pune under single roof

Scotch & Soda	Diesel	Armani Exchange	Superdry
Mont Blanc	GAP	UNi (Apple Premium Reseller)	H&M
Mango	Onitsuka Tiger	Bath & Body Works	Tommy Hilfiger
Sephora	GAS	Zara	MAC
Charles & Keith	Steve Madden	Ethos	Aldo



# No competition in the micro market

Phoenix MarketCity Pune

Inorbit Mall  
Jewel Square  
G-Corp Pulse Mall  
Nitesh Hub

Have been fully or partially converted to office spaces

Seasons Mall

Several international brands seen at PMC  
Pune not present

Pavillion Mall

Smaller mall of  
~0.4 msft GLA

Amanora

Higher vacancies

**Phoenix MarketCity,  
Pune is the  
UNDISPUTED LEADER**



# Growth by Densification

Phoenix MarketCity Pune

Offices Fountainhead  
Tower 1  
~0.17 msft GLA

Offices Fountainhead  
Tower 2  
~0.25 msft GLA

Existing Mall (LG + G + 2)  
~1.1 msft GLA

Offices Fountainhead  
Tower 3  
~0.41 msft GLA

3rd Floor Retail  
~0.08 msft GLA

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# Palladium Case Study & Densification – Future Proofing

**Retail GLA expansion of**  
– Existing Unutilised Area: ~0.15 msft  
– New Construction Area: ~0.35 msft  
Total: ~0.50 msft

**Office GLA Expansion: ~1.00 msft**

**No cost of land**  
**TDR / Premium FSI to be purchased**



The St. Regis, Mumbai

Palladium Mall

Office Expansion Tower 2

Office Expansion Tower 1

Retail Mall Expansion

Existing Mall

Rendered Image. Plans, design and design elements are subject to change

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# ~1.5 msft GLA being added at one of India's most expensive Real Estate



**Enhanced retail offering at India's iconic shopping location**



**Grand Office Lobby**



# Operational commercial portfolio to grow five fold in 4 years



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# Office Expansion by densification of mixed use developments

Operational Office Assets	Location	GLA <sup>^</sup> (msft)
Art Guild House	Mumbai	0.63
Phoenix Paragon Plaza	Mumbai	0.31
The Centrium	Mumbai	0.10
Phoenix House	Mumbai	0.10
Fountainhead Tower 1	Pune	0.17
<b>Total Office Area</b>		<b>1.31</b>

Under Development / Planning Offices	Location	GLA* (msft)
Fountainhead T2 and T3	Pune	~0.66
Phoenix Millennium, Wakad - Office	Pune	~0.6
Palladium Chennai - Office	Chennai	~0.42
PMC Bangalore - Office	Bengaluru	~1
Phoenix Mall of Asia, Hebbal - Office	Bengaluru	~1.2
The Rise, Lower Parel	Mumbai	~1
<b>Total Office Area</b>		<b>~4.88</b>
<b>GRAND TOTAL</b>		<b>~6.19</b>

Office portfolio to grow from 1.31 msft to ~6.19 msft in 4 years

Land is already paid for and historically owned by respective SPV



# Residential Developments

## 9 Towers - One Bangalore West

Towers 1 to 6 – OC received

Tower 7 – Under construction

## 5 Towers – Kessaku, Bangalore

OC received for all





# One Bangalore West - Robust Cash Flow from ready to move in inventory (Towers 1-6)

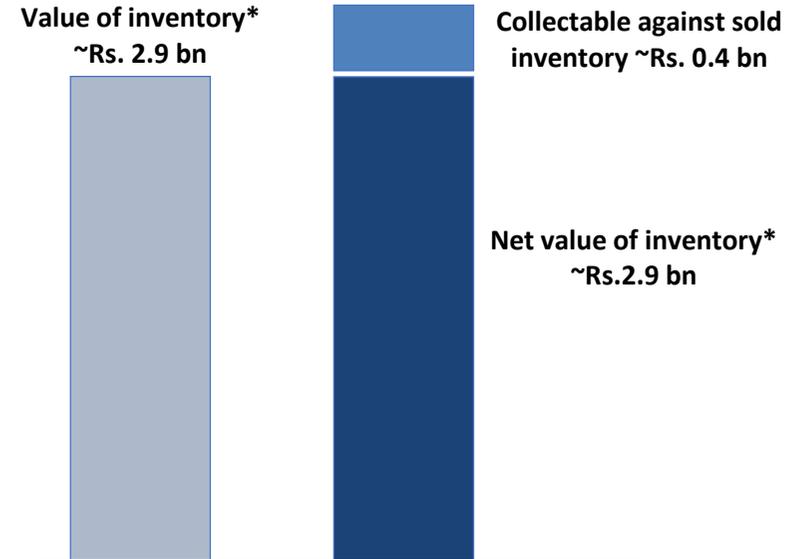
Average Base Price achieved in FY20 for transactions in Tower 1-6  
~Rs. 15,260 per sq. ft.

Inventory of saleable area in ready towers (Tower 1-6)  
~0.19 msft

Value of inventory if sold at the achieved base price of FY20  
~Rs. 2.9 billion

We are not predicting for price increase / decrease or sale velocity.

Total net value of inventory\* +  
Collections against sold flats  
~Rs.3.3 billion



\* At average base price achieved in FY20

Saleable Area is an estimate based on current plans and market/company norms and is subject to change based on negotiations.

This net value of inventory inflow does not factor in corporate, employee expenses and taxes



## One Bangalore West – Sizeable Value in Under Construction Towers 7-9

Average Base Price achieved in FY20 for Tower 7  
~Rs. 14,400 per sq. ft.

Inventory of saleable area in under construction towers  
(Tower 7-9)  
~0.86 msft

Value of under construction inventory if sold at the achieved  
base price of FY20  
~Rs. 12.4 billion

Land is paid for and zero debt on Towers 7-9

We are not predicting for price increase / decrease or sale velocity.

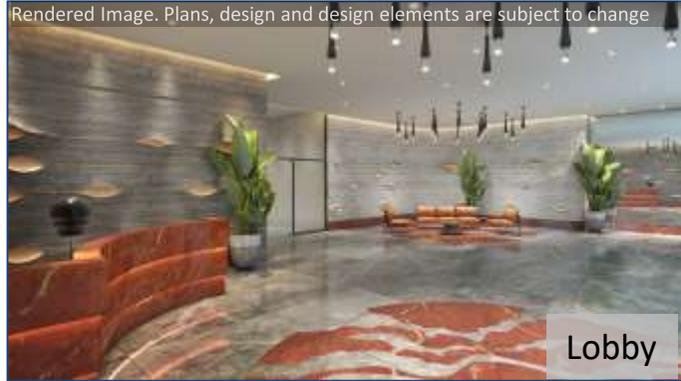


Photo shot on location of a completed tower of One Bangalore West

\* At average base price achieved in FY20  
Saleable Area is an estimate based on current plans and market/company norms and is subject to change based on negotiations.  
This net value of inventory inflow does not factor in corporate, employee expenses and taxes



# Kessaku – The Masterpiece





# Kessaku - Robust Cash Flow from sale of ready to move in inventory

Average Base Price achieved in FY20 for transactions in Towers - Sora, Niwa & Mizu  
~Rs. 15,500 per sq. ft.

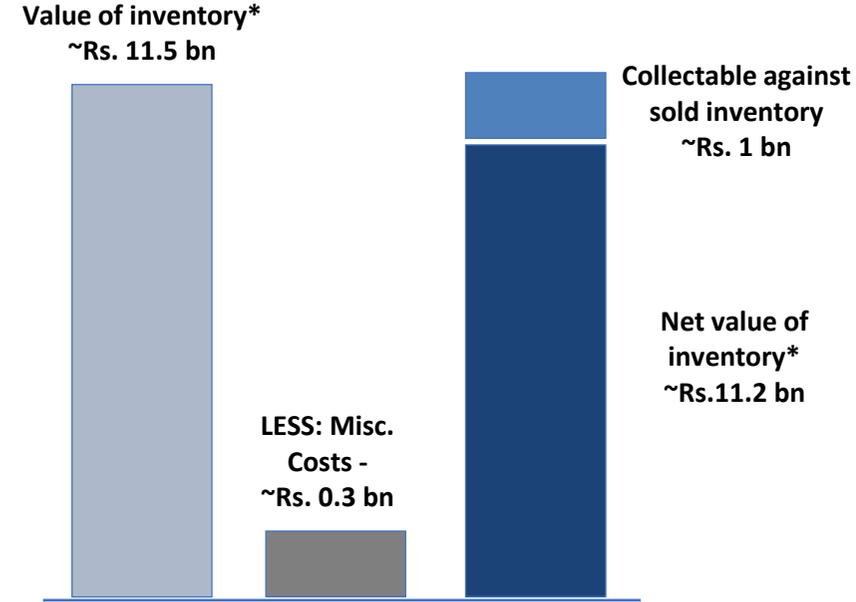
Inventory of saleable area in ready towers  
~0.74 msft

Value of inventory if sold at the achieved base price of FY20  
~Rs. 11.5 billion

No existing debt on Kessaku

We are not predicting for price increase / decrease or sale velocity.

Total net value of inventory\* +  
Collections against sold flats  
~Rs.12.2 billion



\* At average base price achieved in FY20

Saleable Area is an estimate based on current plans and market/company norms and is subject to change based on changes in configuration and negotiations.

Misc. costs could vary based on changes in market conditions and input prices

This net value of inventory inflow does not factor in corporate, employee expenses and taxes



# Amenities – Club One

Photo shot at location



2 TENNIS COURTS



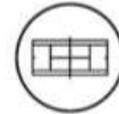
2 BADMINTON COURTS



2 SQUASH COURTS



2-LANE BOWLING ALLEY



MULTI-PURPOSE INDOOR COURTS



INDOOR GAMES ROOM



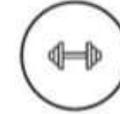
BILLIARDS & SNOOKER



OUTDOOR POOLS



INDOOR TEMPERATURE-CONTROLLED POOL



GYMNASIUM



YOGA ROOM



JOGGING TRACK



SPA & SALON



CHILDREN'S PLAY AREA



18-SEATER MINI THEATRE



READING ROOM



POOLSIDE CAFÉ



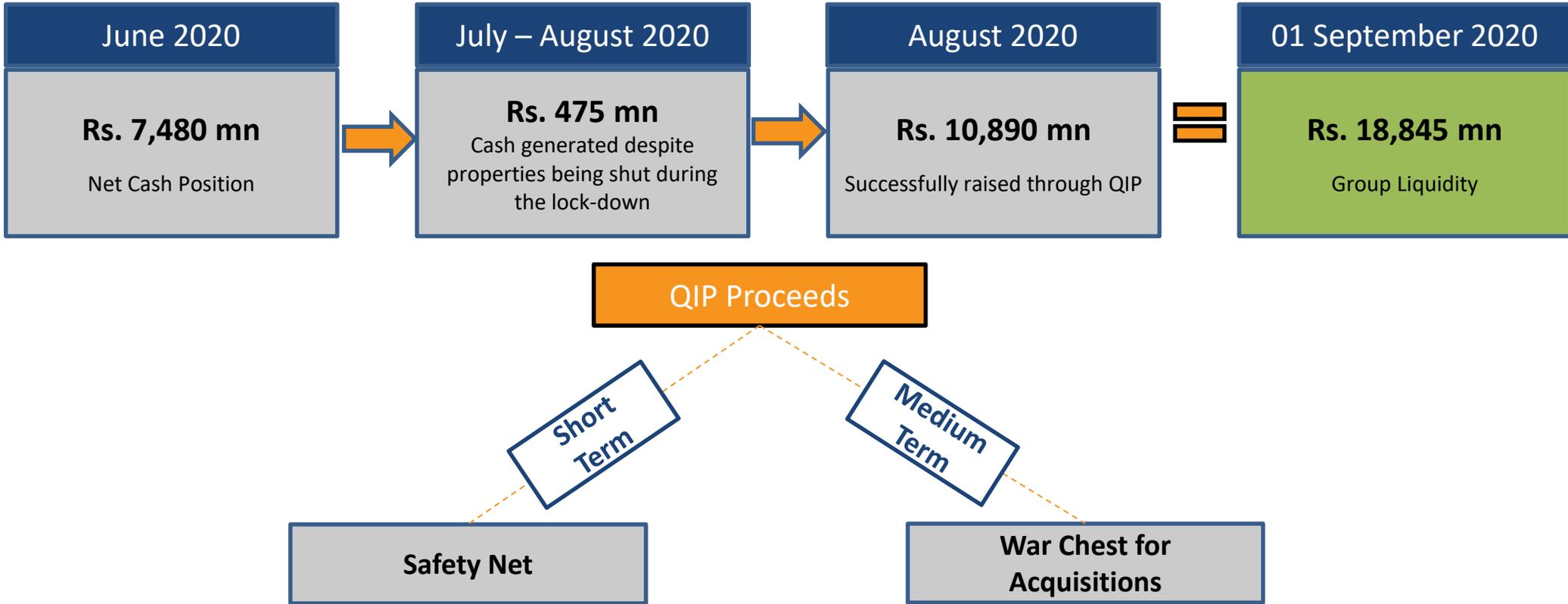
BANQUET HALL WITH PRE-FUNCTION AREA



DOCTOR'S ROOM



# Fund Raising to further strengthen PML's balance sheet



Strong Cash Position despite lockdown; QIP proceeds improved Group liquidity, Stabilize short – medium term operations



# Advantage Phoenix



# Awards • Accolades • Excellence

## HIGH STREET PHOENIX & PALLADIUM

### ET Now 2020

Most Admired Shopping Centre (Marketing & Promotions)  
Shopping Centre of the Year

Times Network - National Awards 2019

Most Admired Shopping Centre Shopping Centre (Luxury)

### CMO Asia 2019

Shopping Centre (Luxury)  
Best Digital Marketing Campaign - #HSPWISHCIRCLE

### ABP News 2019

Brand Excellence Awards

### Golden Globe Tiger 2019

Brand Excellence in Retail & Real Estate

### TAVF 2019

Best Festive Decor

## PHOENIX MARKETCITY PUNE

### ET Now – Global Awards 2020 Shopping Centre – Luxury (West)

### BTVI National Awards 2019

The Good Life Moment – Most Admired Marketing Campaign  
Best Thematic Décor – Wax of Fame

### Pride of Maharashtra Awards 2019

Shopping Centre  
Best Social Media Marketing Campaign

My Maharashtra Awards 2019  
Luxury Mall of Maharashtra

### TAVF 2019

Best Festive Décor – Sheesh Mahal

ABP News Awards 2019  
Marketing Campaign – Royal Diwali

## PHOENIX MARKETCITY BANGALORE

### Times Business Awards 2020

The Times Retail Trailblazers Award  
Most Admired Shopping Centre

### ET Now – Global Awards 2020

Most Admired Marketing Campaign

### Golden Globe Tiger Awards

Excellence & Leadership Awards in Brands & Marketing (2020)  
Shopping Centre – Metro West (2019)

### TAVF Awards 2020

Most Innovative Experiential Display – Holiday Land  
Best IP of the year – Phoenix Festival Season 2

Times Network – National Awards 2019

Best Thematic Decoration – Tallest Christmas Tree in the Country

## PHOENIX MARKETCITY MUMBAI

### ET Business Icon Awards 2020

Popular Shopping Mall

### GIAA – Genius Indian Achievers Award 2020

Best Shopping Mall of the Country

### Times Hospitality Icon Awards 2020

Popular F&B Destination of the City – Dublin Square

### Mid Day Awards 2020

Iconic Retailers Award

### TAVF Awards 2020

Best Entertainment Venue

### HSE Summit & Awards India

Safe Retail Facility Award

## PHOENIX MARKETCITY CHENNAI

### Times Retail Icon Awards 2020

Most Luxurious Fashion Destination (Palladium)  
Best Shopping Mall (PMC Chennai)

### Global Awards 2020

Best Customer Shopping Mall (PMC Chennai)  
Shopping Centre – Luxury (Palladium Chennai)

### Guinness World Records 2020

Largest Cricket Bat (PMC Chennai & Palladium)



# Concert at Liberty Square, Phoenix MarketCity, Pune



Photo shot at location



## A Concert Venue



Photo shot at location

Guru Randhawa Concert at Phoenix MarketCity, Mumbai



# Larger than life installations



Photo shot at location

Phoenix MarketCity, Mumbai



Photo shot at location

High Street Phoenix, Mumbai



Photo shot at location

Phoenix MarketCity, Mumbai



# Spectacular Events



**Amit Trivedi**



**Euphoria**



**Shaggy**



**Shankar Mahadevan**



**Sonu Nigam**



**Lucky Ali**



**Vengaboys**



**Divine**



**The Local Train**



## Record breaking festive décor

Tallest Christmas Tree for 3 years in a row



Photo shot at location





# Tech Integration – Phoenix Nhance App

Loyalty Program with Earn & Burn Capability



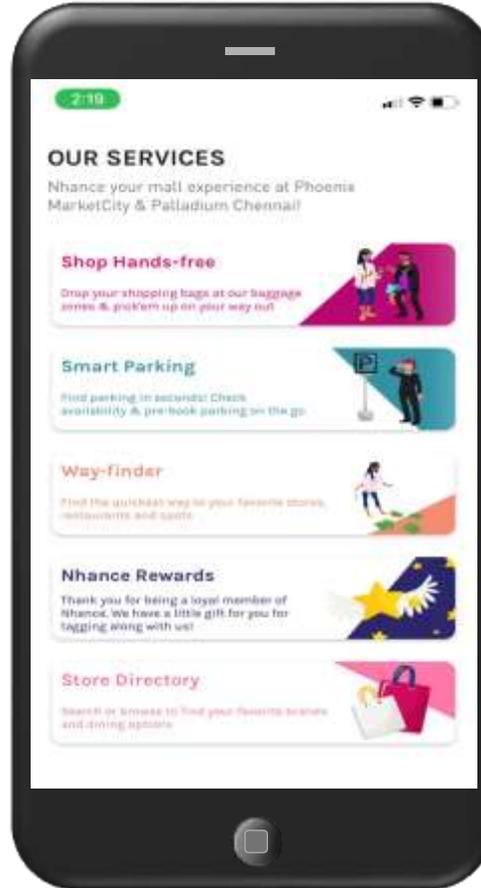
Parking Pre Booking & Navigation



Hands Free Shopping



Customer Behavior & Big Data



In-Mall Real Time Navigation App



Event Ticket Booking



Customer Chat Bot



Contactless Food Ordering



# Omni-Channel – A digital extension for in-mall brands - Under Development



## Online Sales & Engagement

All the brands available in the mall available on boarded online to enable online sales



## Multiple Modes & Pan India Reach

Accessible through multiple devices with identical user interaction and ease of shopping



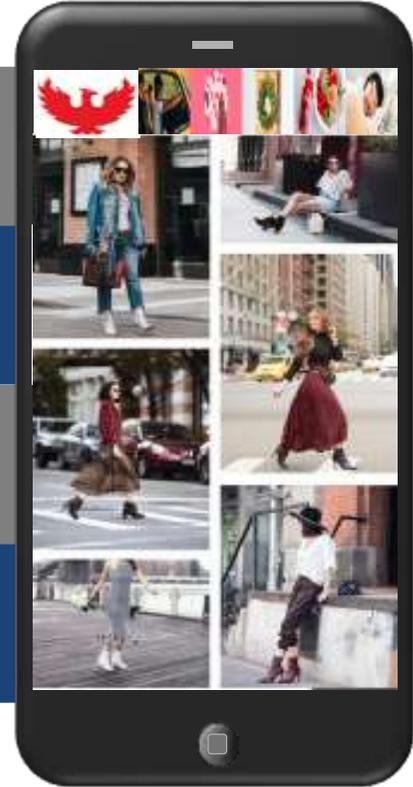
## Premium Showcase

With showcase of premium brands that any customer expects in a Phoenix mall, the offering stands out from the clutter



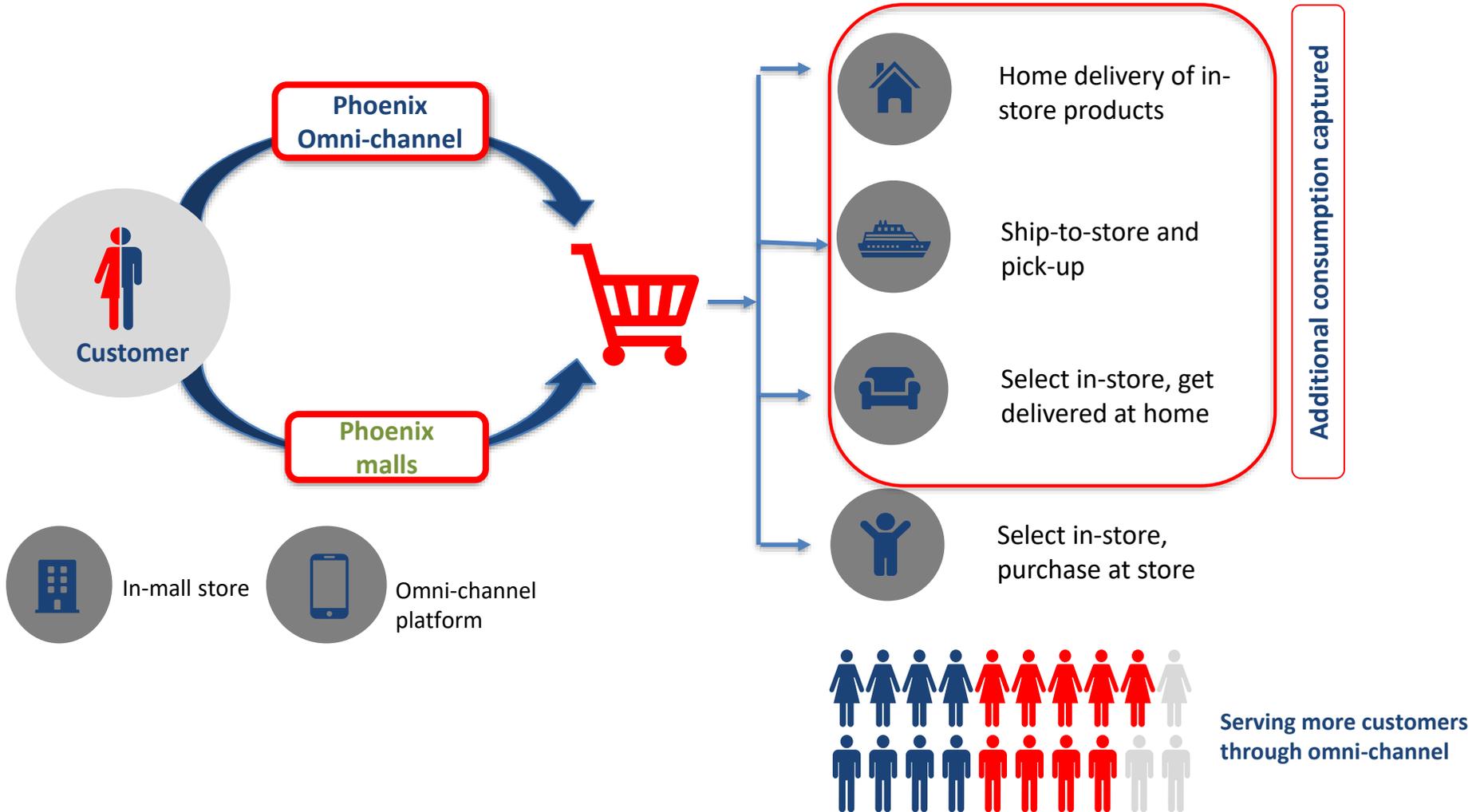
## Tailored Shopping

Services such as pick-up from the mall, reserve for trial, deliver to home , contactless payments, curb side pick





# Omni-Channel - Boosting consumption - Under Development





# Omni-Channel - Value creation for all stakeholders - Under Development



**Customers**



Surf through more stores in less time



Convenience of shopping 24X 7 through multiple devices



Unique online offering of premium in-season products



Rewards Earn and Burn



**Retail partners**



Easier integration with their own multi-channel



Reduced incremental customer acquisition cost



Increase in sales



Bespoke marketing and offers to customers



**Phoenix**



Incremental Sales



Encourage mall visits through in-mall pick-ups



Increase the catchment of physical malls through same day city-wide delivery



Better understanding of customers' Purchase Behavior & Preferences

# Thank you!

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