



**REACHING FARTHER.
GETTING CLOSER.**
Investing in the Future.

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Attendance Slip
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Vision



GAINING INDUSTRY LEADERSHIP



‘To gain the leadership position in the industry as a broadband service provider by becoming the preferred choice of consumers by offering high speed internet connectivity and best in class services, leveraging our existing infrastructure and reach in a platform neutral environment, using latest technology as an edge.’

Growing a Sustainable Business

Siti Cable Network Limited is one of India's leading Multi-System Operator (MSO) providing digital/analog cable tv and broadband services.

We are a part of an USD 8 Billion* Essel Group that has a strong presence across the media industry and interests in infrastructure, education, packaging, precious metals, gaming, theme parks and health, lifestyle & wellness. The group is one of the leading producers, content aggregators and distributors of Indian programming globally; and has a presence in over 169 countries with a strong bouquet of channels.

Being an Essel Group company, Siti Cable is in a unique advantageous position. We are the only MSO who is vertically integrated with a broadcasting group which has one of the largest bouquets in the country.

Since the last few years, we have been making consistent and considerable investments to expand reach, add new revenue streams, offer a differentiated experience to consumers, strengthen relationships with partners; and thus create a strong foundation for sustainable and profitable growth.

The Company expanded presence from 60 cities in 2012-13 to 130 cities in 2014-15; and plans to expand to over 200 cities by December 2015

which is the regulatory timeline for shutdown of analog cable in phase 3 areas.

For Siti Cable, reaching farther is not just about expanding the physical spread but also about deepening the relationships with customers by being close to their lives and enabling digital empowerment.

World over consumer habits are changing with more and more consumers moving from a linear viewing experience to on demand content. This movement is also leading to an implosion in data consumption. India is an under-penetrated market for broadband services with consumer ARPU significantly higher than video.

With over 10 million connectable households, we have the unique advantage of existing infrastructure and relationships with partners to be a potent force in the expanding broadband landscape of India. To build on to this advantage, we are also investing in technology and human capital to transform into a leading broadband service provider preferred by our consumers.

10.5 Mn
Video Subscribers

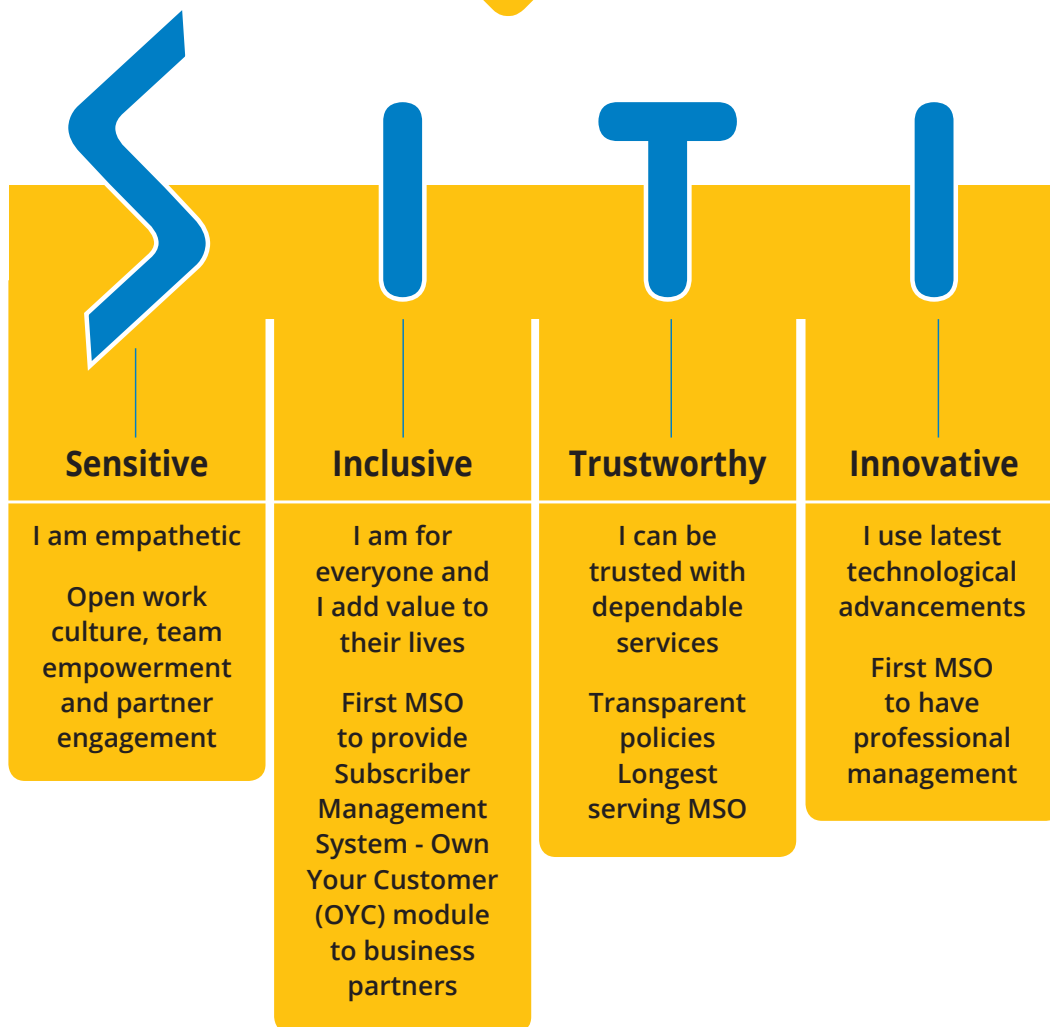
The Company expanded presence from 60 cities in 2012-13 to 130 cities in 2014-15; and plans to expand to over 200 cities by December 2015 which is the regulatory timeline for shutdown of analog cable in phase 3 areas.

70,100
Internet Subscribers

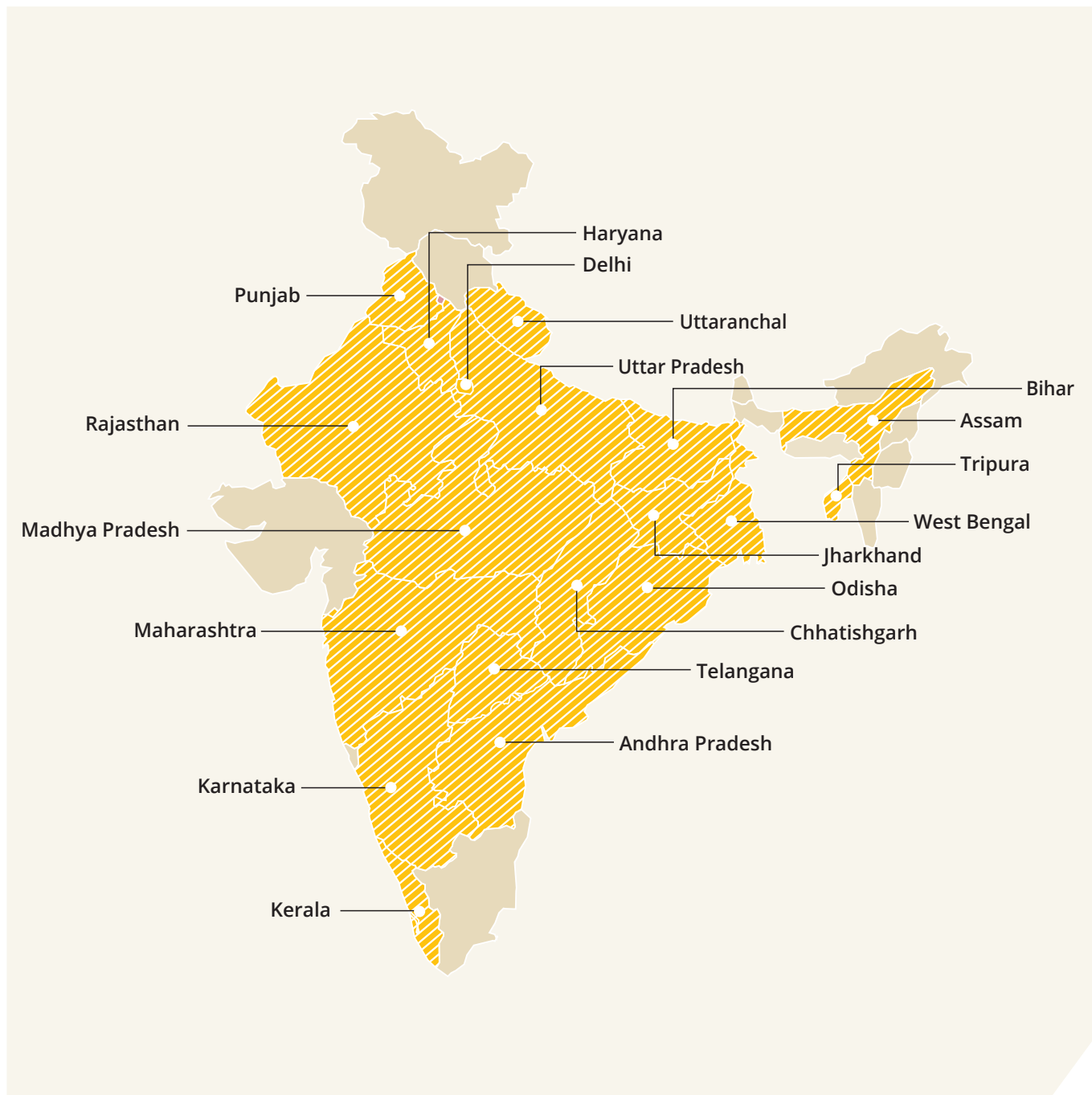
* As per the Market Cap of the listed entities under the Parent Group as on June 29, 2015



I am



India Loves SITI Cable



Our Growth Story

2006

- Wire and Wireless (India) Ltd. incorporated

2007

- Implemented CAS in metros of Delhi, Mumbai, Kolkata and Chennai

2008

- Initiated mass digitisation through Headend-in-the-Sky (HITS) Services

2009

- Rights issue of ₹ 4,500 million fully subscribed

2010

- India's largest Multi System Operator (MSO) in the cable industry

2011

- Spread across 54 key cities

2012

- DAS implemented in Phase-1 Cities; Delhi, Mumbai and Kolkata
- Offered 400 Standard Definition (SD) channels
- Consolidated pan-India presence through strategic expansions in Uttar Pradesh and Central India
- Broadband started in eastern region on EOC Technology

2013

- DAS implemented in Phase-2 cities
- Operationalised 'Own Your Customer' Customer Management System
- Achieved 3 million digital subscriber base
- Fund infusion of ₹ 3,240 million by promoters

2014

- Achieved 4 million digital subscriber base
- Broadband launched in Delhi on DOCSIS2/3 technology
- Package-wise billing started in DAS Phase 1 cities
- Started providing 18 HD channels

2015

- Successfully raised ₹ 2,210 million from the secondary market through the QIP route in February 2015; marquee investors included HDFC, UBS, Reliance Mutual Fund and others
- Digital cable subscribers at 5.38 million with a cable universe of 10.5 million; internet subscribers at 70,100
- Providing 500 SD and 30+ HD channels
- Ready to roll out cable operations in 70 more cities and broadband services in 8 cities

Our Competitive Edge



Part of an USD 8 Billion* Group, India's leading Media Conglomerate

- Promoter entity (Essel Group) is India's leading media conglomerate with interests spanning broadcasting (one of India's largest network of Hindi GEC, multilingual entertainment and special interest channels as well as 10 news channels in six languages), distribution (India's first and largest DTH TV business) and SITI Cable (India's oldest and third largest MSO), as well as print (National English newspaper)
- Fully-integrated presence across the media value chain and access to Group synergies and media library
- Better deal terms through collaboration and stronger negotiation abilities, leveraging economies of scale across the network



Strong systems and processes

- 'Own Your Customer' Subscriber Management System provides robust back end and customer insights; majority of CAF forms collected
- Proactive carriage sharing with LCOs
- Uniform commercial policies in place
- Advanced technology infrastructure



Strong adherence to regulatory compliance

- Systems and processes to adhere to TRAI recommended standardised industry practices
- First to launch Gross Billing in Phase-1 cities of Delhi, Mumbai and Kolkata as mandated by TRAI
- LCO Interconnect Agreements signed and revenue share with LCOs



Talented and seasoned management team

- Our people maintain high level of professionalism and corporate integrity
- They are empowered to make real-time proactive decisions and respond to emerging opportunities and challenges
- Strong consumer orientation, hired from industries, such as telecom, FMCG and consumer durables to ensure that Siti Cable imbibes the ethos of a consumer centric company as opposed to a business-to-business enterprise
- Siti Cable has completely revamped its senior management team. Today, we have people with a variety of experience who help inculcate new systems and processes, and ensuring a continuity of the corporate culture at the same time
- The cross pollination of ideas and learnings from diverse industries allows Siti Cable to appreciate and anticipate customer needs better and respond to them proactively
- We have streamlined the operations of our subsidiaries in the nine zones we operate in, and now have a robust management structure that ensures efficient operations

* As per the Market Cap of the listed entities under the Parent Group as on June 29, 2015



Corporate Governance

- Strong corporate governance practices
- Transparent and consistent commercial policies govern interaction with various stakeholders



Established relationship with industry leading suppliers

- Head-ends and servers from leading suppliers, such as Tandberg, Harmonic, Cisco and HCL.
- Software/SMS from Elitecore, Zee Turner, SAP



Differentiated consumer experience

- Implemented the 'own your customer' ('OYC') subscriber management system for real-time access of subscriber billings, payments, account statements, activation, de-activation, up-gradation, down gradation, packaging and monthly collections at the business partner's end
- Educating subscribers about their rights and options in relation to fostering the B2C model in line with regulatory requirements
- Have set up two call centres in Noida and Kolkata for efficient customer service and have provided toll free access for our customers



Cable subscribers

10.5 Mn



Digital cable subscribers

5.38 Mn



Internet subscribers

70,100



India household reach

5%



Presence

130 cities



Broadband presence

5 cities

2014-15 : Operational Highlights



Expanded Footprint

Digital Cable

- Entered into new cities, such as Nagpur, Pune, Mysore and Dehradun
- Made inroads in towns coming under the ambit of Phase-3 rollout plan in states, such as Kerala, Madhya Pradesh, Maharashtra, Andhra Pradesh and Haryana

Broadband

- Launched high speed internet services through DOCSIS 3.0 platform on our cable network in Delhi/NCR with an internet speed ranging from 5 Mbps to 100 Mbps with a data plan policy of up to 100 GB

Upgraded Infrastructure

- Newly installed 6 state of the art headends for future ready technology offering 500 SD and 30+ HD channels

- Introduced innovative advertising through the STB

Launching New Channels

- Launched four in-house channels, viz. SITI Shopping, SITI Romance, SITI Events and SITI Cinema
- Offered sports and other select content channels on 'a-la-carte' basis to subscribers

Awards and Accolades

Awarded at the 6th BCS Ratna which is the most prestigious industry felicitation

- Recognised as the Most Outstanding MSO in the implementation of DAS policies, for strict adherence to regulatory and tax compliances
- Recognised for our outstanding performance in managing LCO Networks