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RESTAURANTS

3M 2013 IFRS financial results

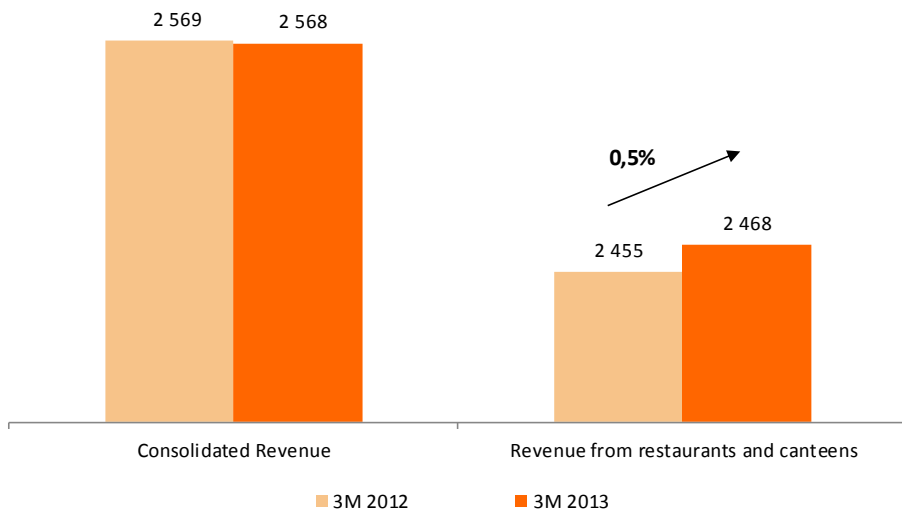
Investors and Analysts Presentation



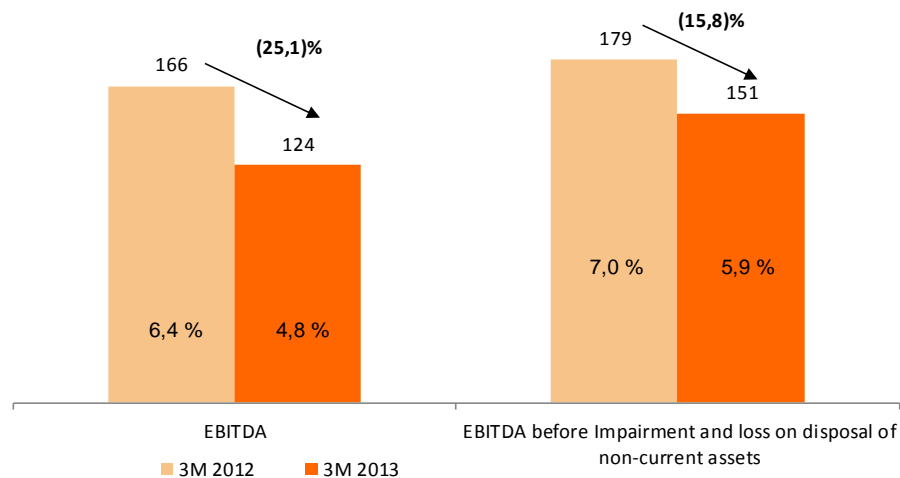
10 June 2013

- Same store portfolio gross revenue increased in 3M 2013 by 0.3%. The same store transactions decline slowed to (1.5)% in 3M 2013 compared to (5.1)% for the 3M 2012 showing some green shoots of recovery.
- Consolidated net revenue stood at RUB 2,568 mln and is flat compared with 3M 2012.
- Operating profit before impairment amounted to RUB 48 mln for an operating margin before impairment of 1.9% compared with a margin of 2.8% in 3M 2012.
- EBITDA before impairment and write-offs amounted to RUB 151 mln for a margin of 5.9% compared with a margin of 7.0% in 3M 2012.
- Net loss amounted to RUB 26 mln and net loss margin stood at (1.0)% compared with a net loss margin of (1.4)% in 3M 2012.
- Net debt decreased by 4% to RUB 904 mln.

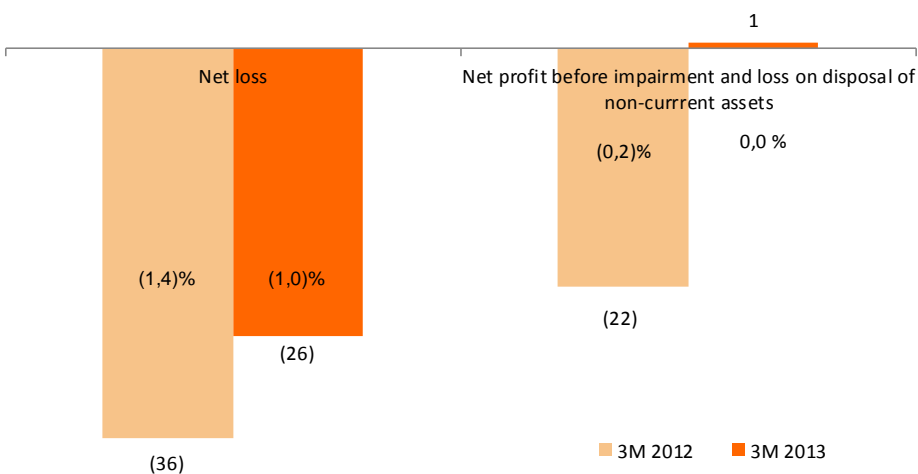
Net Revenue, Rub mln



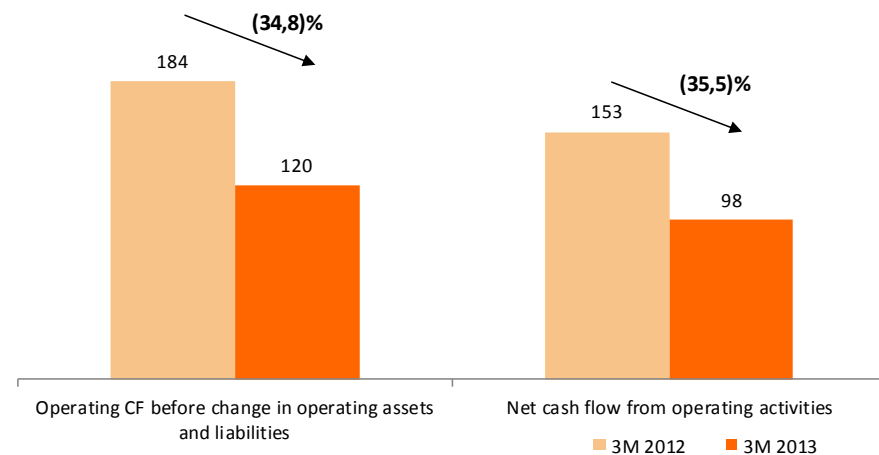
EBITDA, Rub mln



Net Loss/Profit, Rub mln



Operating Cash Flow, Rub mln

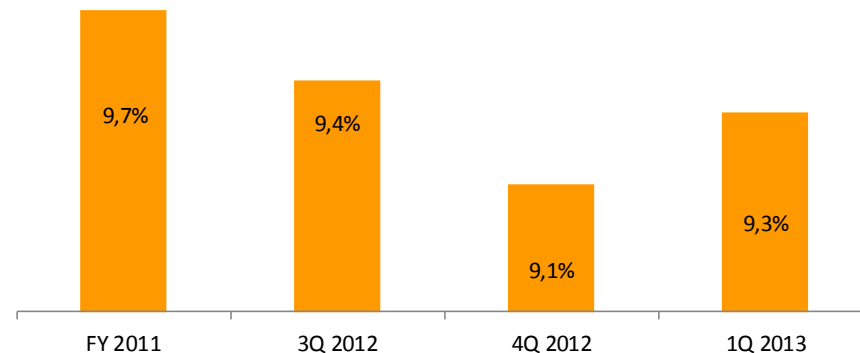


3M 2013 Income Statement

RUB mln.		3M 2013		3M 2012	
Net revenue		2 568 379	100,0 %	2 569 378	100,0 %
<i>Incl. Revenue from restaurants and canteens</i>		2 468 054	96,1 %	2 454 912	95,5 %
<i>Incl. Revenue from franchising</i>		69 383	2,7 %	69 130	2,7 %
Cost of sales		2 130 091	82,9 %	2 078 787	80,9 %
<i>Incl. Food and beverages</i>		592 001	23,0 %	600 243	23,4 %
<i>Incl. Payroll and related taxes</i>	✗	590 609	23,0 %	568 173	22,1 %
<i>Incl. Rent</i>	✗	509 918	19,9 %	456 780	17,8 %
Gross profit		438 288	17,1 %	490 591	19,1 %
SG&A Expenses	✓	346 427	13,5 %	385 245	15,0 %
Start-up expenses		29 594	1,2 %	22 879	0,9 %
Other gains		18 958	0,7 %	11 815	0,5 %
Other losses		33 450	1,3 %	21 742	0,8 %
Losses from impairment of operating assets		4 719	0,2 %	1 647	0,1 %
Profit from operating activities		43 056	1,7 %	70 892	2,8 %
Profit/(loss) before tax		8 045	0,3 %	(20 547)	(0,8)%
Income tax		(34 423)	(1,3)%	(15 171)	(0,6)%
Net loss		(26 378)	(1,0)%	(35 718)	(1,4)%
EBITDA		124 071	4,8 %	165 646	6,4 %
EBITDA before impairment		128 790	5,0 %	167 293	6,5 %
EBITDA before impairment and write-offs		151 060	5,9 %	179 479	7,0 %

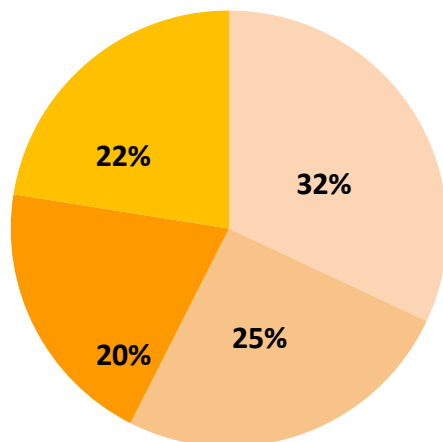
- In 3 months 2013 gross debt is at a similar level as it was in 3 months 2012.
- Long-term component of the debt portfolio increased to 42,5% as of March 31, 2013.

Average Interest Rates



Debt maturity

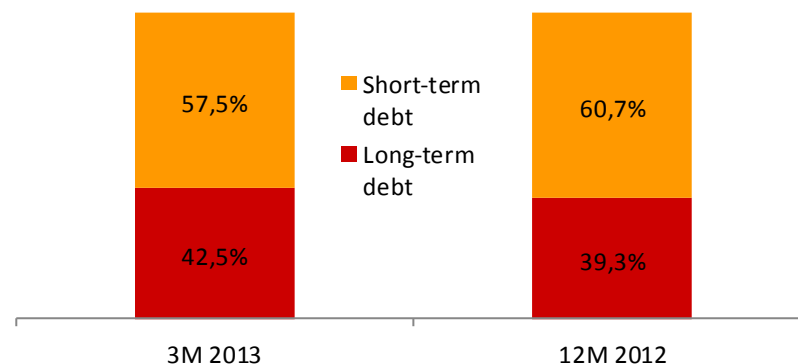
- Within 6M (2Q'13-3Q'13)
- 6M-12M (4Q'13-1Q'14)
- 12M-18M (2Q'14-3Q'14)
- 18M+



Debt Portfolio

US \$ 40,25
RUB 1,251 mln

US \$ 39,26
RUB 1,220 mln



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