

JFL/NSE-BSE/2026-27/12

May 20, 2026

BSE Limited
P.J. Towers, Dalal Street
Mumbai – 400001

National Stock Exchange of India Limited
Exchange Plaza, Bandra Kurla Complex
Bandra(E), Mumbai – 400051

Scrip Code: 533155

Symbol: JUBLFOOD

Sub: Earnings Presentation

Ref: Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 ("Listing Regulations")

Dear Sir/ Madam,

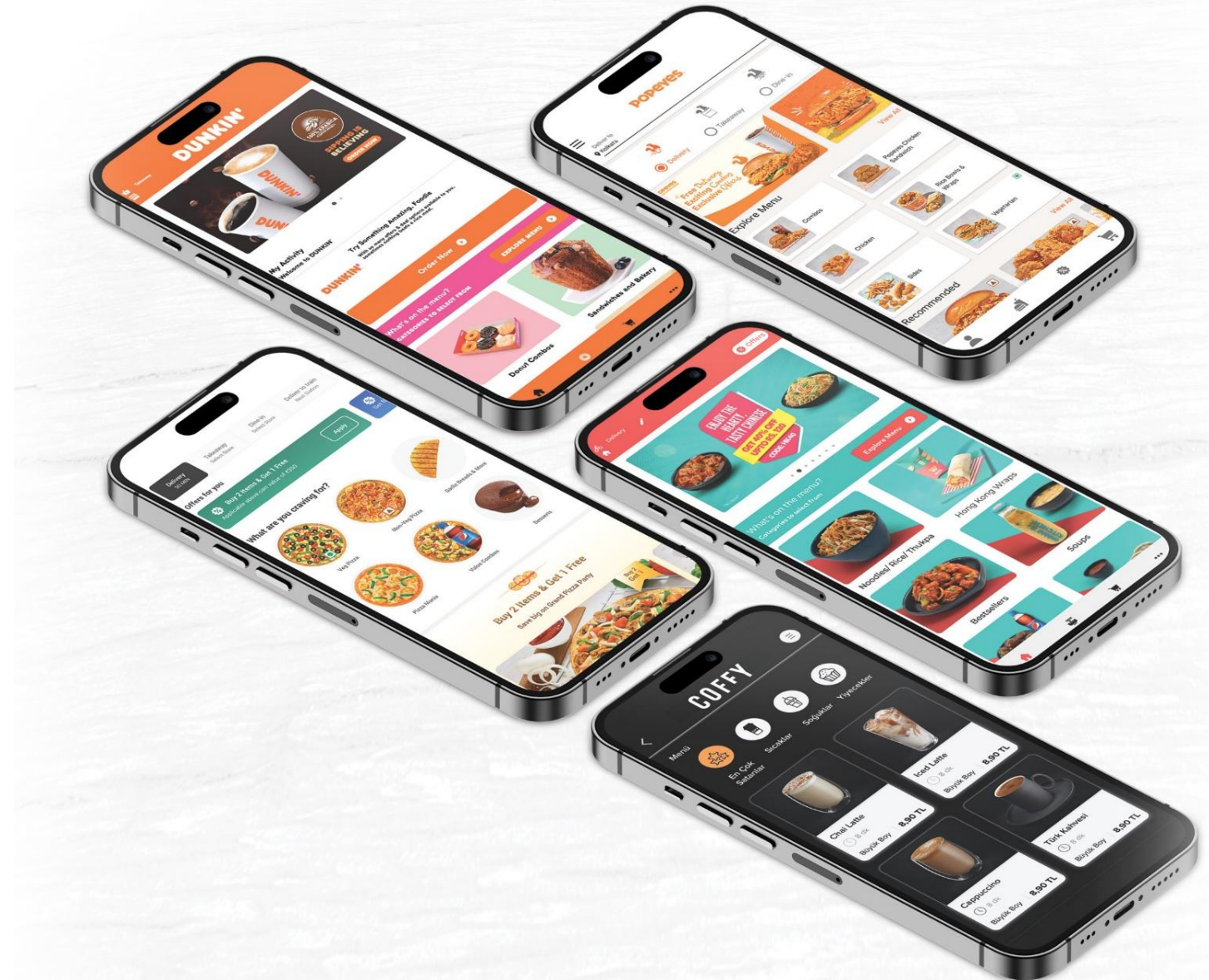
Pursuant to Regulation 30 of Listing Obligations, please find enclosed herewith the Earnings Presentation to be issued by the Company for Q4 FY26 & FY26 results.

The above details will also be available on the website of the Company at www.jubilantfoodworks.com under [Investor Relations](#) section.

This is for your information and records.

Thanking you,
For **Jubilant FoodWorks Limited**

Mona Aggarwal
Company Secretary and Compliance Officer
Investor E-mail id: investor@jublfood.com
Encl: A/a



Earnings Presentation

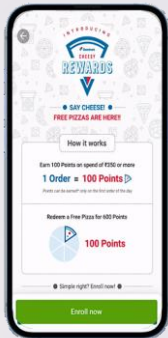
Q4 & FY26



Jubilant FoodWorks : A Multi-Brand Food-Tech Company

Breakthrough Technology

B



Loyalty Program



Immersive & Friction-free App



Location AI



Restaurant Co-pilot



4.3/5 CSAT Score⁽¹⁾



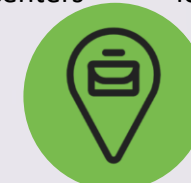
25+ Foodparks and Distribution centers



300+ Multi-temperature logistics fleet



~37k Bikes



650+ Cities

Operate with Excellence⁽²⁾

O

Our Purpose:

We Serve Joy 😊

Lead with Purpose

L



Drive GROWTH



Be CUSTOMER-FIRST



Find BETTER WAYS



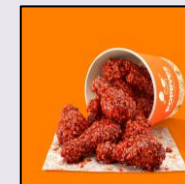
HUSTLE Mindfully



Lead with CARE



Domino's



POPEYES

D



HONG'S KITCHEN
Hearty! Tasty! Chinese!



COFFY

Delicious Food

(1) Customer satisfaction score consolidated across all channels
 (2) Consolidated across all geographies except CSAT score

Jubilant FoodWorks : Leading QSR player in Emerging High-Growth markets



We serve ~25% of the world population



Largest QSR player for 30yrs ; 1.7x the 2nd largest player



• New markets entered during last 15 years



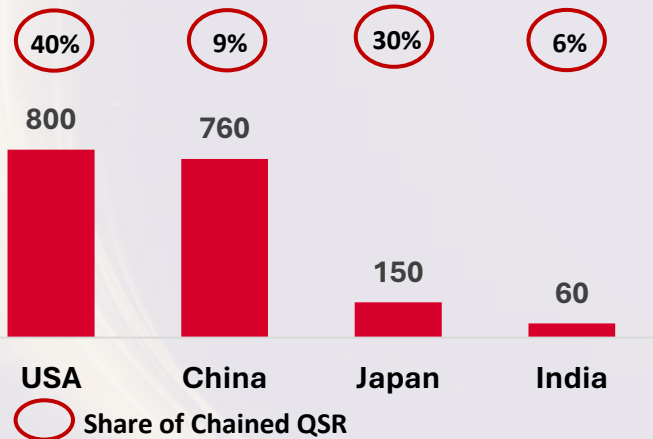
• High-growth markets contributing materially to the top and bottom-line



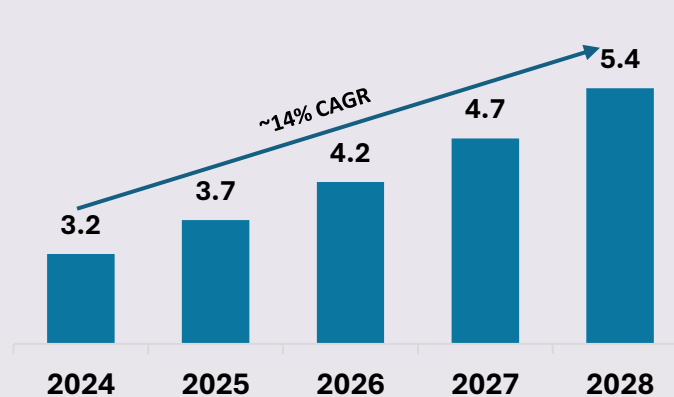
Significant headroom for growth

- Median age of population in the markets JFL operates is under 35⁽²⁾
- Strong demand for QSRs within GenZ and Gen Alpha: early adoption locks in lifelong customers
- Rising middle income class & discretionary spend-share of wallet: China discretionary share at 70% vs. India at 54%⁽¹⁾
- Rapid growth in smartphone penetration and adoption of online commerce
- Online commerce is an increasing trend in consumers: China at 67% vs India at 17% of population⁽¹⁾
- Aspirational consumption seeing significant growth within the expanding middle income class
- Consumers gravitating towards branded/organized chains for trusted quality

Global Foodservice Market (\$Bn)⁽¹⁾



India Chained QSR Market (\$Bn)⁽¹⁾



(1) Various industry reports

(2) <https://worldpopulationreview.com/country-rankings/median-age>

Jubilant FoodWorks⁽¹⁾ : 3,636 stores worldwide, 69 net stores added during Q4FY26



Store additions in Q4FY26

	End of Q3FY26					Net additions in Q4FY26					End of Q4FY26				
	India	Turkey ⁽²⁾	SL	BAN	Total	India	Turkey ⁽²⁾	SL	BAN	Total	India	Turkey ⁽²⁾	SL	BAN	Total
Domino's	2,396	783	53	40	3,272	59	4	0	0	63	2,455	787	53	40	3,335
POPEYES	73	-	-	-	73	5	-	-	-	5	78	-	-	-	78
HONG'S KITCHEN Hearty! Tasty! Chinese!	32	-	-	-	32	-3	-	-	-	-3	29	-	-	-	29
COFFY		190	-	-	190	-	4	-	-	4	-	194	-	-	194
Total	2,501	973	53	40	3,567	61	8	-	-	69	2,562	981	53	40	3,636

(1) Post reclassification of Dunkin as discontinued operations in current and prior periods only. As of March 31, 2026 – Dunkin had 27 stores operating

(2) Turkey includes Georgia and Azerbaijan as well



Jubilant FoodWorks⁽¹⁾ : 3,636 stores worldwide, 351 net stores added during FY26



Store additions in FY26

	End of FY25					Net additions in FY26					End of FY26				
	India	Turkey ⁽²⁾	SL	BAN	Total	India	Turkey ⁽²⁾	SL	BAN	Total	India	Turkey ⁽²⁾	SL	BAN	Total
Domino's	2,179	763	50	39	3,031	276	24	3	1	304	2,455	787	53	40	3,335
POPEYES	61	-	-	-	61	17	-	-	-	17	78	-	-	-	78
HONG'S KITCHEN Hearty! Tasty! Chinese!	33	-	-	-	33	-4	-	-	-	-4	29	-	-	-	29
COFFY	-	160	-	-	160	-	34	-	-	34	-	194	-	-	194
Total	2,273	923	50	39	3,285	289	58	3	1	351	2,562	981	53	40	3,636

(1) Post reclassification of Dunkin as discontinued operations in current and prior periods only. As of March 31, 2026 – Dunkin had 27 stores operating

(2) Turkey includes Georgia and Azerbaijan as well



Agenda

1

**Financial
Trends**

2

**Market-wise
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**Statement of
Profit and Loss**

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Appendix



Financial Trends



POPEYES
FAMOUS LOUISIANA CHICKEN

Boring hatao.
Bold ko laao.

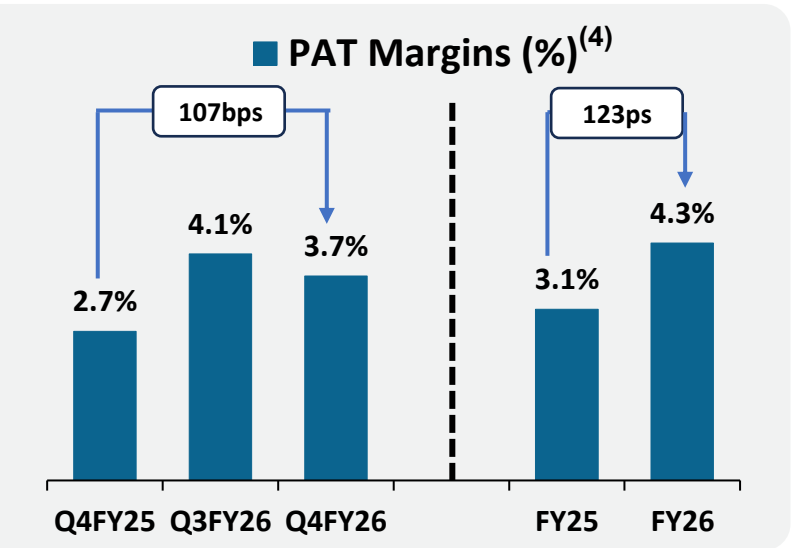
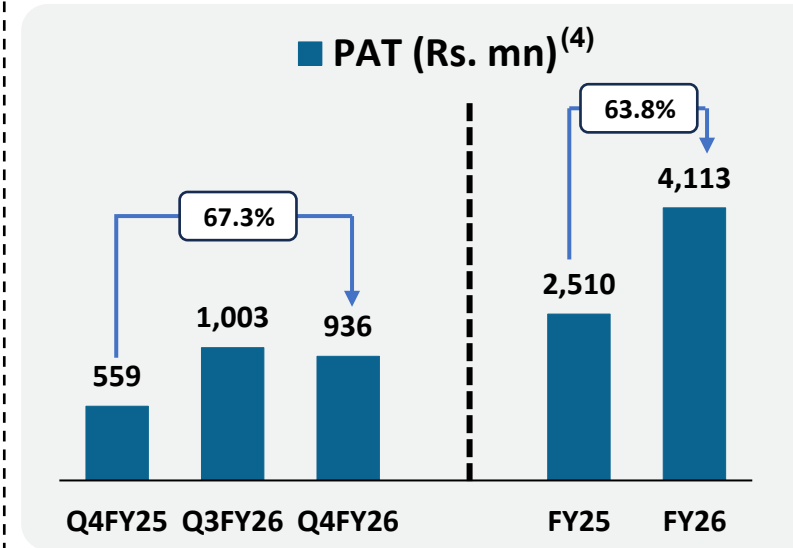
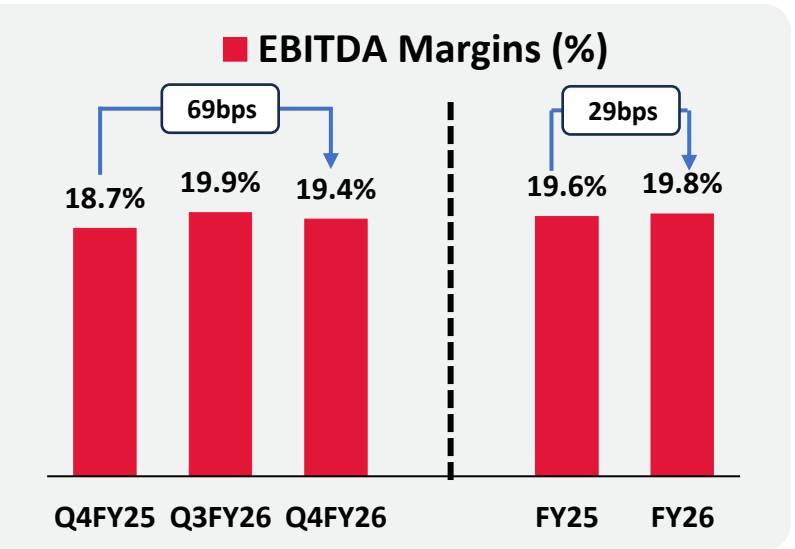
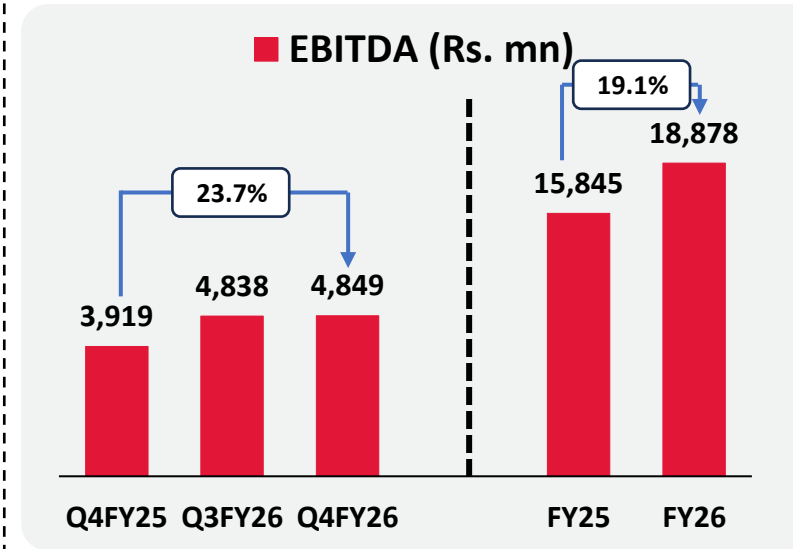
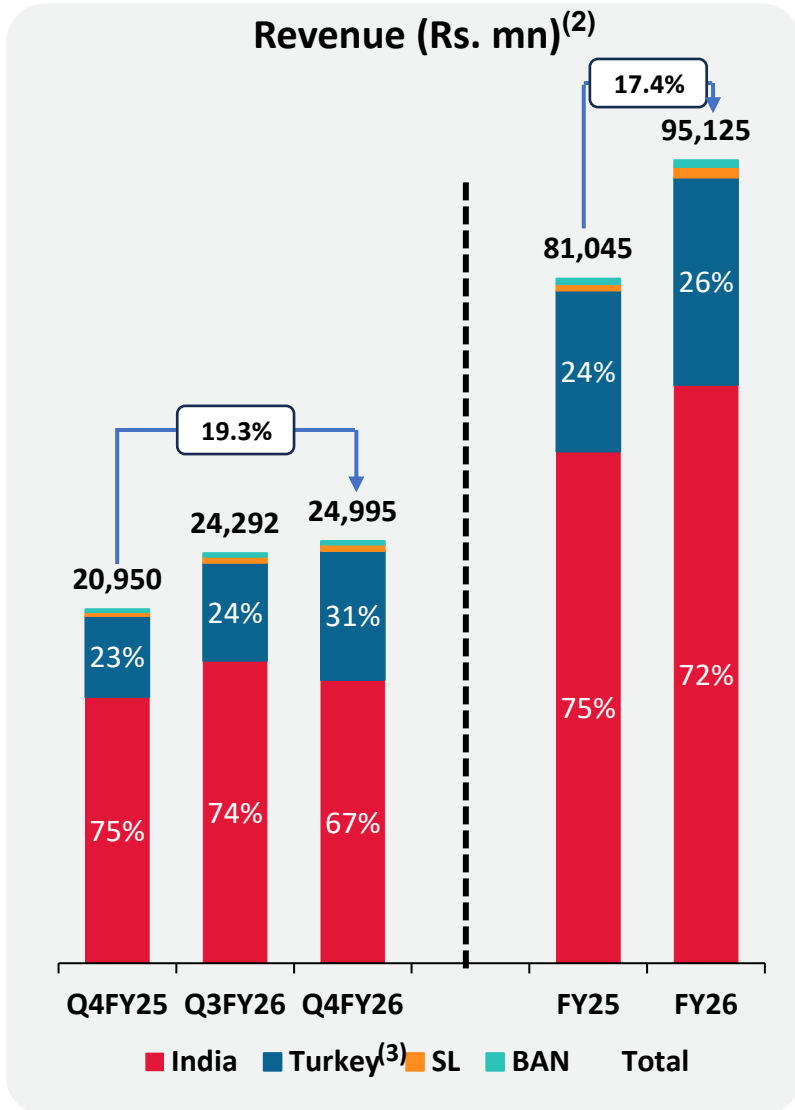
15 Pcs for ₹ 399

3 Pcs Signature Chicken + 6 Pcs Tenders + 6 Pcs Sweet Chilli Wings



Q4FY26 Consolidated Performance⁽¹⁾

Revenue up 19.3%; EBITDA margin up 69bps; PAT margin up 107bps



(1) Post reclassification of Dunkin as discontinued operations in current and prior periods

(2) System sales for the year was Rs. 109,838 Mn in FY26; +17.9% vs FY25

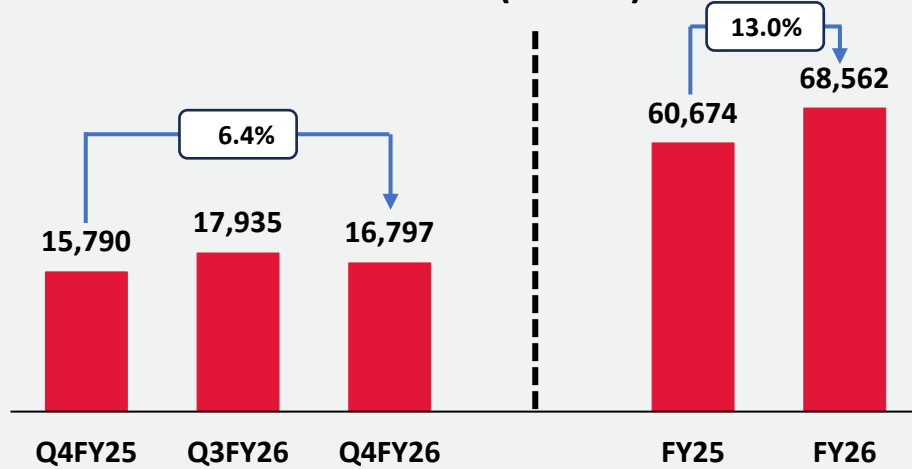
(3) Turkey includes Georgia and Azerbaijan as well

(4) PAT of continued operations before exceptional items

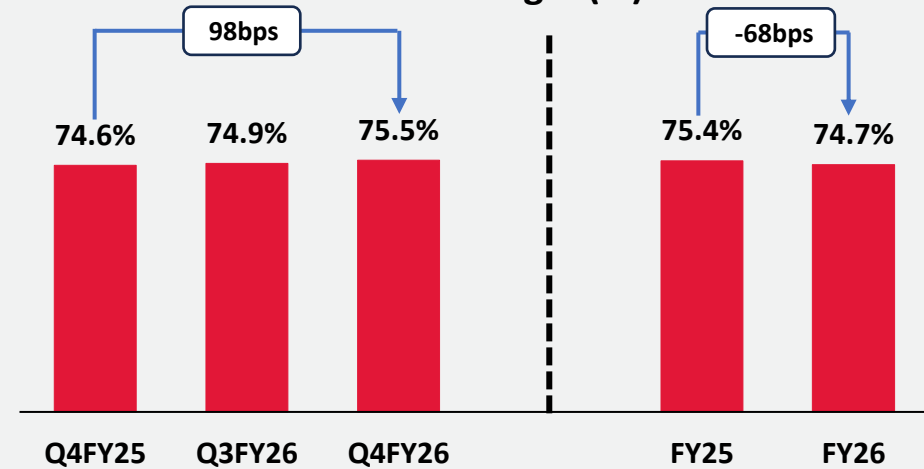
Q4FY26 Standalone Performance⁽¹⁾

Revenue up 6.4%; Gross margin up 98bps; Adj. EBITDA⁽²⁾ up 5.5%

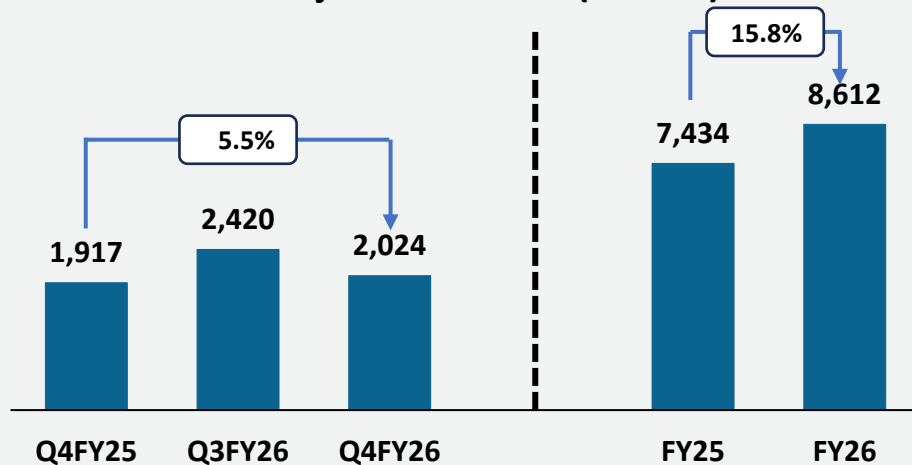
■ Revenue (Rs. mn)



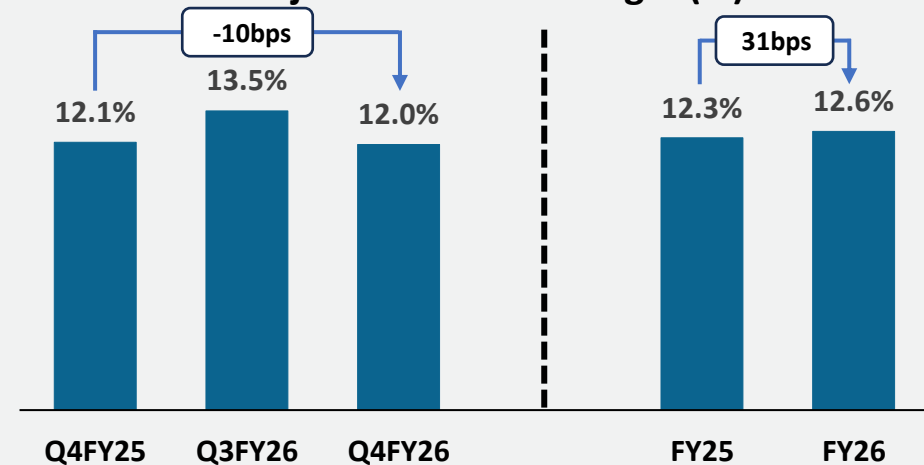
■ Gross Margin (%)



■ Adjusted EBITDA (Rs. mn)⁽²⁾



■ Adjusted EBITDA Margin (%)⁽²⁾



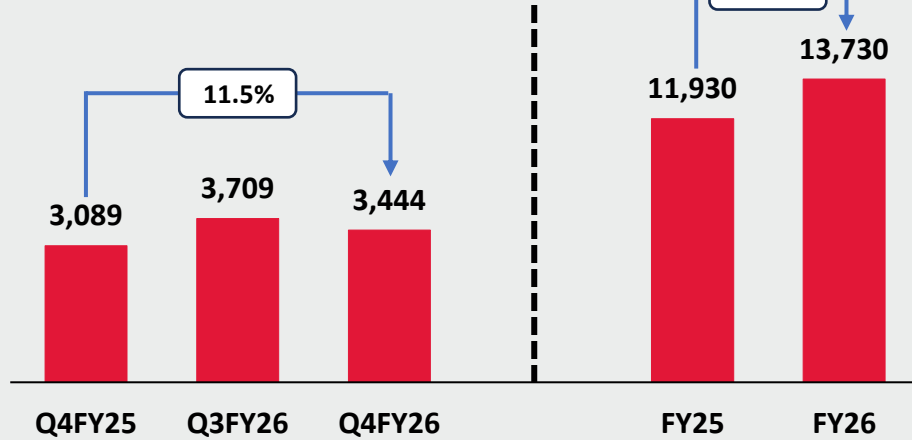
(1) Post reclassification of Dunkin as discontinued operations in current and prior periods

(2) Adjusted EBITDA margin is Pre-Ind AS 116 EBITDA margin

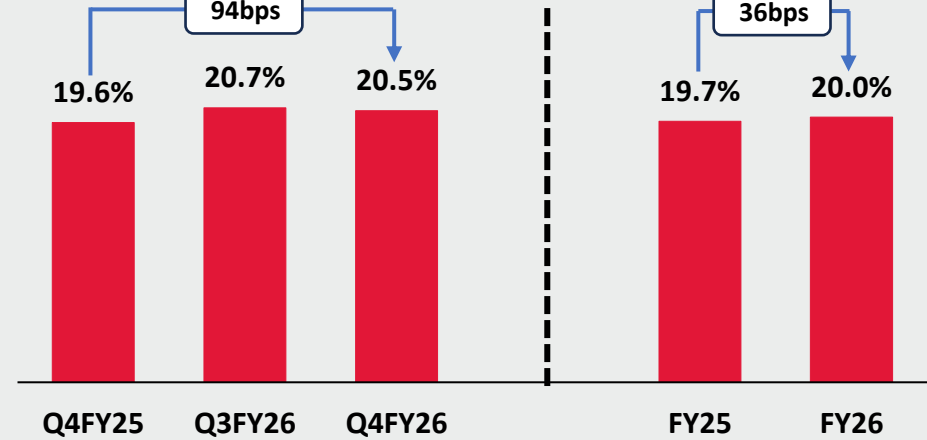
Q4FY26 Standalone Performance⁽¹⁾

EBITDA margin up by 94bps in Q4; PAT margin down 30 bps

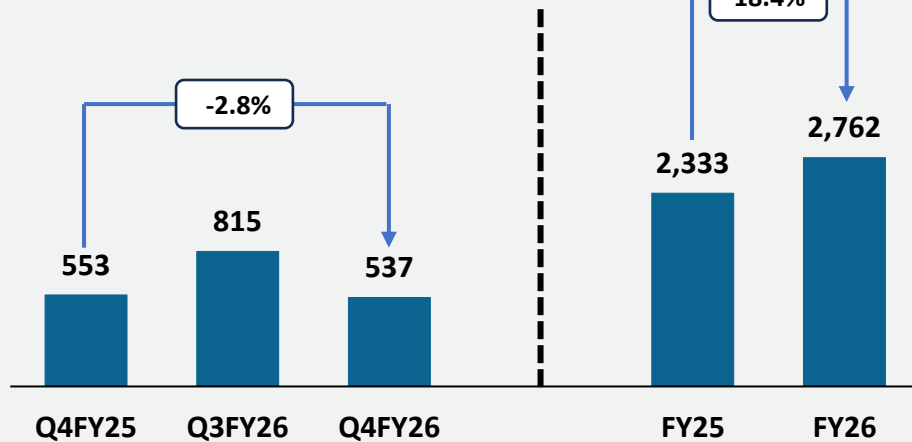
■ EBITDA (Rs. mn)



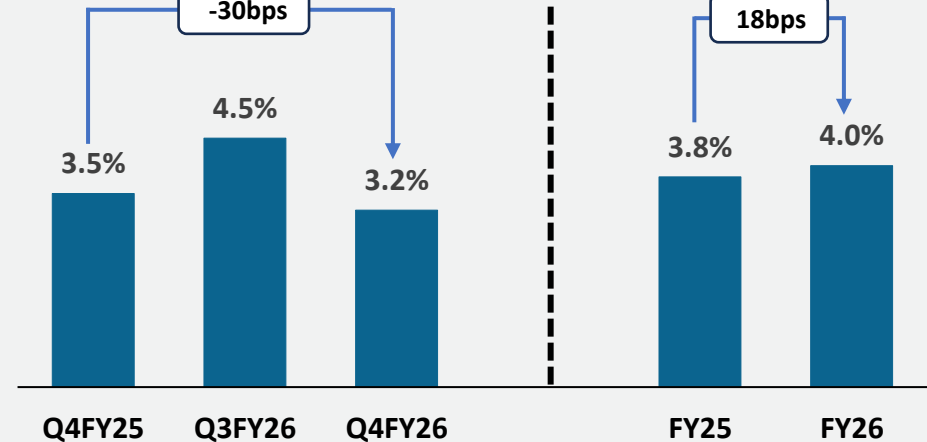
■ EBITDA Margins (%)



■ PAT (Rs. mn)⁽²⁾



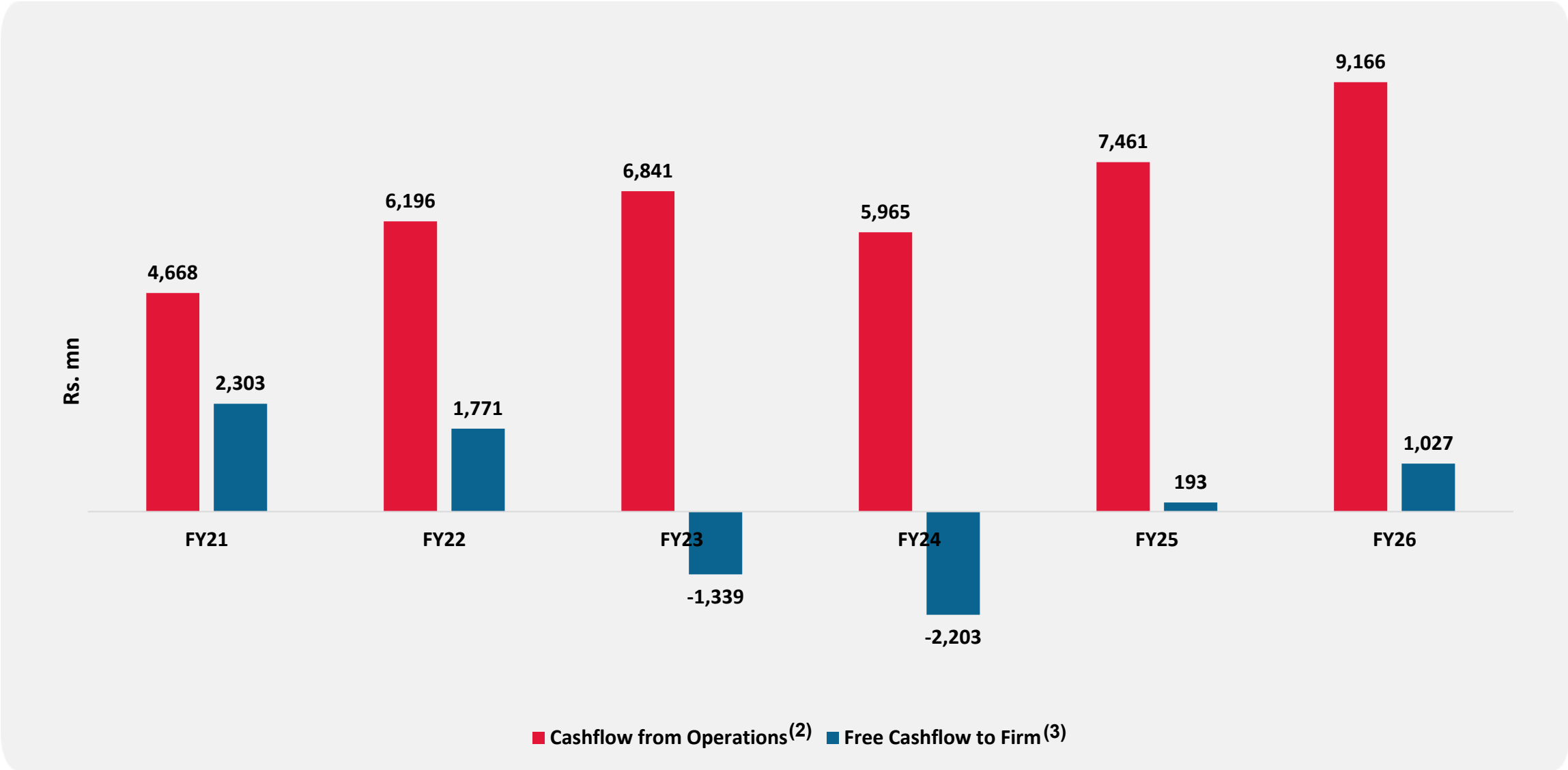
■ PAT Margin (%)⁽²⁾



(1) Post reclassification of Dunkin as discontinued operations in current and prior periods

(2) PAT of continued operations before exceptional items

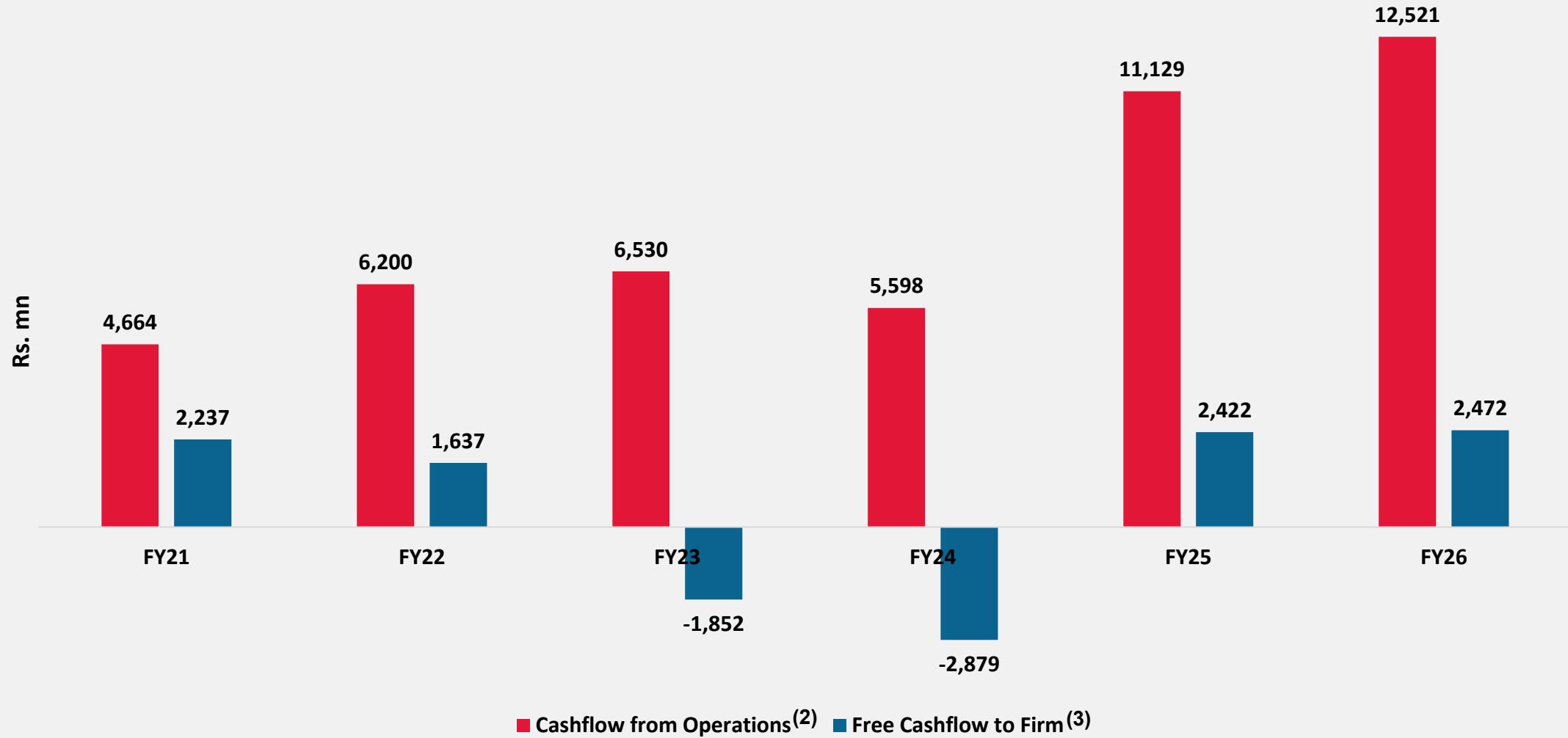
Standalone Performance⁽¹⁾ : Steady Progress in Free Cashflow Generation



(1) Post reclassification of Dunkin as discontinued operations in FY25 and FY26 only
 (2) Cashflow from Operations is post repayment of lease liabilities under Ind AS 116
 (3) Free Cashflow to Firm = Cashflow from Operations minus net Capex on cash basis instead of accrual basis



Consolidated Performance⁽¹⁾ : Steady Progress in Free Cashflow Generation



(1) Post reclassification of Dunkin as discontinued operations in FY25 and FY26 only

(2) Cashflow from Operations is post repayment of lease liabilities under Ind AS 116

(3) Free Cashflow to Firm = Cashflow from Operations minus net Capex on cash basis instead of accrual basis



Market-wise Highlights



Revenue & Store Growth

Revenue: Rs. 16,797 mn (+6.4% YoY)

Stores: Net addition of 61 stores QoQ

Domino's revenue grew **5.0% YoY** in Q4

- LFL growth of **0.2% YoY**; ADS at **Rs. 80,069/-**
- Strong order growth of **10.4% YoY**
- Delivery channel revenue grew **10.3% YoY**, Delivery mix at **76.1%**
- **59 stores added**; expanded to **10 new cities**, Cities present: **521**

Popeyes on strong growth trajectory

- **SSG of 28%** in **FY26**
- **Added 5 stores**; store count increased to **78**
- **Expanded footprint in West - entered Pune**

Profitability

EBITDA 20.5%: Rs. 3,444 mn (+11.5% YoY)

PAT⁽²⁾ 3.2%: Rs. 537 mn (-2.8% YoY)

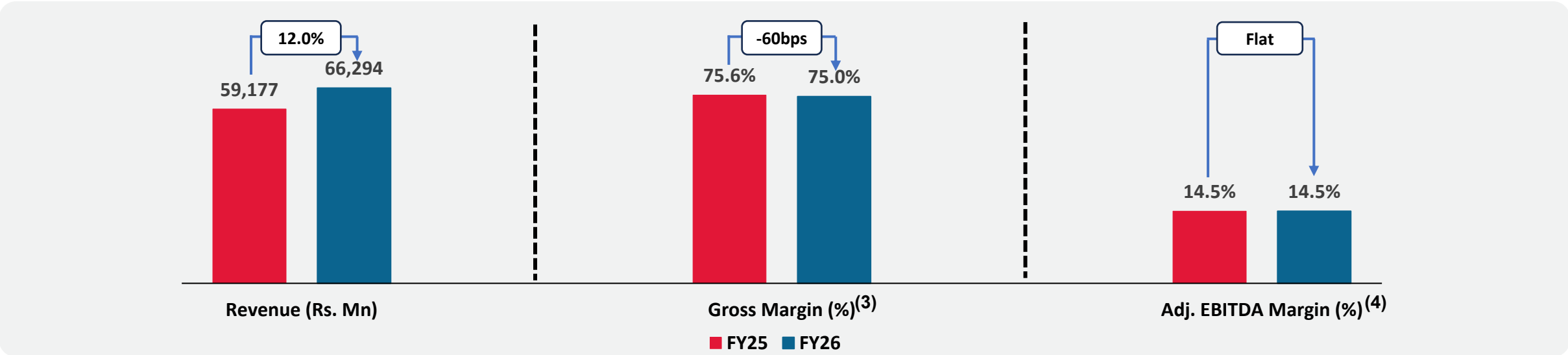
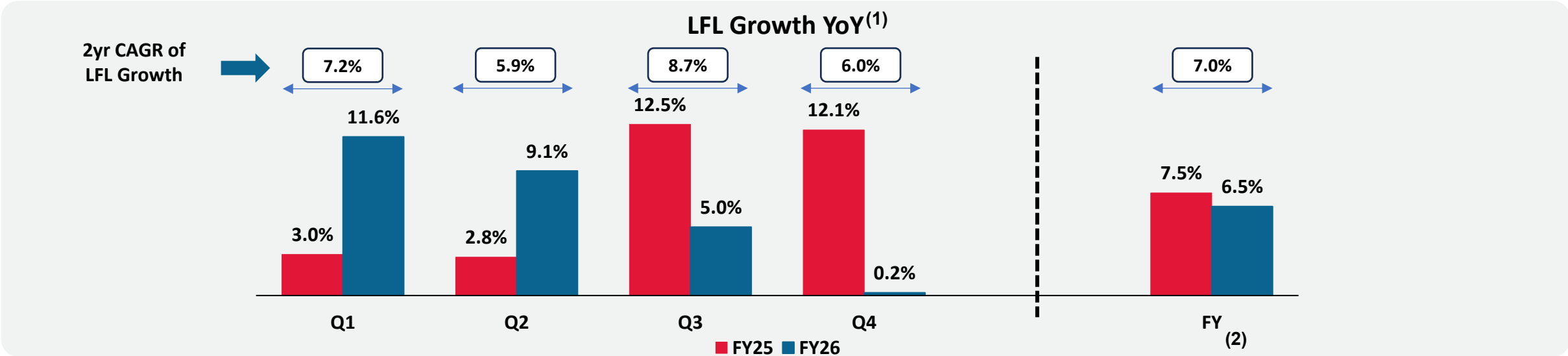
- ❖ **Gross Margin expanded ~100 bps YoY and ~60bps QoQ** on account of increasing share of gross margin accretive SKUs and reduction in wastage
- ❖ **Adjusted EBITDA margin shrunk by 10 bps YoY** due to inflation in wage cost and energy cost
- ❖ **RoCE⁽³⁾ expanded by 70 bps** to 18.9% in FY26 vs FY25 driven by improvement in Supply chain and Tech assets' utilization as business scaled

(1) Post reclassification of Dunkin as discontinued operations in current and prior periods

(2) PAT of continued operations before exceptional items

(3) RoCE is defined as Pre-Ind AS 116 EBIT / Average Capital Employed for the year. Capital Employed is calculated as PP&E + Intangible assets + Security deposits + Other non-current assets (excluding investments and tax assets) + Current assets (excluding investments, cash and cash equivalents) – Current Liabilities (excluding borrowings and tax liabilities)

India: Domino's LFL Growth within medium term guidance range of 5-7%



(1) LFL ADS/Mature Store ADS: Defined as average daily sales for non-split(mature) restaurants opened before previous financial year(computed on 1,638 stores)

LFL: Defined as YoY growth in revenue for non-split(mature) restaurants opened before previous financial year

(2) Full year LFL growth is simple average of LFL growth of the four quarters during the year

(3) Restaurant margin is post direct marketing expense and aggregator commission

(4) Adjusted EBITDA margin is Pre-Ind AS 116 EBITDA margins



Customized late night menu addition

CHEESE BOWL-CANO



Domino's

Cheese Bowl-Cano

~~₹ 299~~
₹ 149

AVAILABLE 11PM-3AM ONLY

T&C Apply. Images are for representation purposes only.

The advertisement features a large, round, golden-brown bowl filled with melted yellow cheese sauce, garnished with green herbs. The bowl is placed on a dark blue plate. The background is a dark wood-grain texture. The Domino's logo is in the top left corner. The product name 'Cheese Bowl-Cano' is written in a large, bubbly, yellow font with a dripping effect. A price tag in the bottom left shows a crossed-out price of ₹ 299 and a current price of ₹ 149. A yellow banner at the bottom states 'AVAILABLE 11PM-3AM ONLY'. Small text at the bottom left reads 'T&C Apply. Images are for representation purposes only.'

Launched Big Big Cheese Burst Pizza



Domino's

Big Big 6 in 1 CHEESE BURST Pizza

~~₹ 2149~~
₹ 999*

T&C Apply. Images are shown for illustration purpose only. Prices starting at (₹999 Veg - ₹1199 Non Veg).

The advertisement shows a hand holding a square slice of pizza topped with melted cheese, red and green bell peppers, jalapeños, and olives. In the background, a large pizza is cut into many small squares on a wooden board. The Domino's logo is in the top right corner. The product name 'Big Big 6 in 1 CHEESE BURST Pizza' is written in a large, stylized font. A price tag in the bottom right shows a crossed-out price of ₹ 2149 and a current price of ₹ 999*. Small text at the bottom left reads 'T&C Apply. Images are shown for illustration purpose only. Prices starting at (₹999 Veg - ₹1199 Non Veg).'

Flavorful menu innovation



POPEYES
FAMOUS LOUISIANA CHICKEN

The most flavorful chicken is here!*

Classic Ranch

Sweet Chilli

Hot & Spicy

Wood Smoke

Pepper BBQ

Korean Twist

*TAC apply. Creative visualization. Actual product and quantity may vary. Offer valid at select stores. *As per the report of Simon Kucher, dated July 2024. This product contains added MONOSODIUM GLUTAMATE. NOT RECOMMENDED FOR INFANTS BELOW 12 MONTHS AND PREGNANT WOMEN. | Applicable only for Non-Vegetarian Products.



POPEYES
FAMOUS LOUISIANA CHICKEN

The most flavorful chicken is here!

Korean Twist | Sweet Chilli | Signature Chicken | Smoky Pepper

*TAC apply. Creative visualization. Actual product and quantity may vary. Offer valid at select stores. Applicable only for Non-Vegetarian Products. This product contains added MONOSODIUM GLUTAMATE. NOT RECOMMENDED FOR INFANTS BELOW 12 MONTHS AND PREGNANT WOMEN.

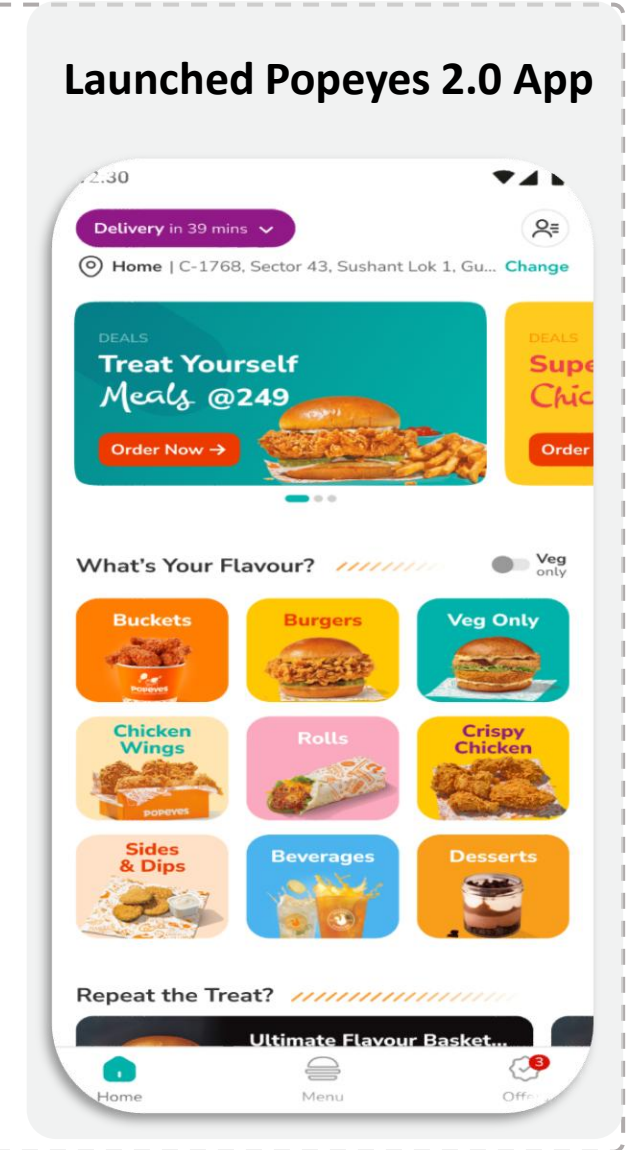
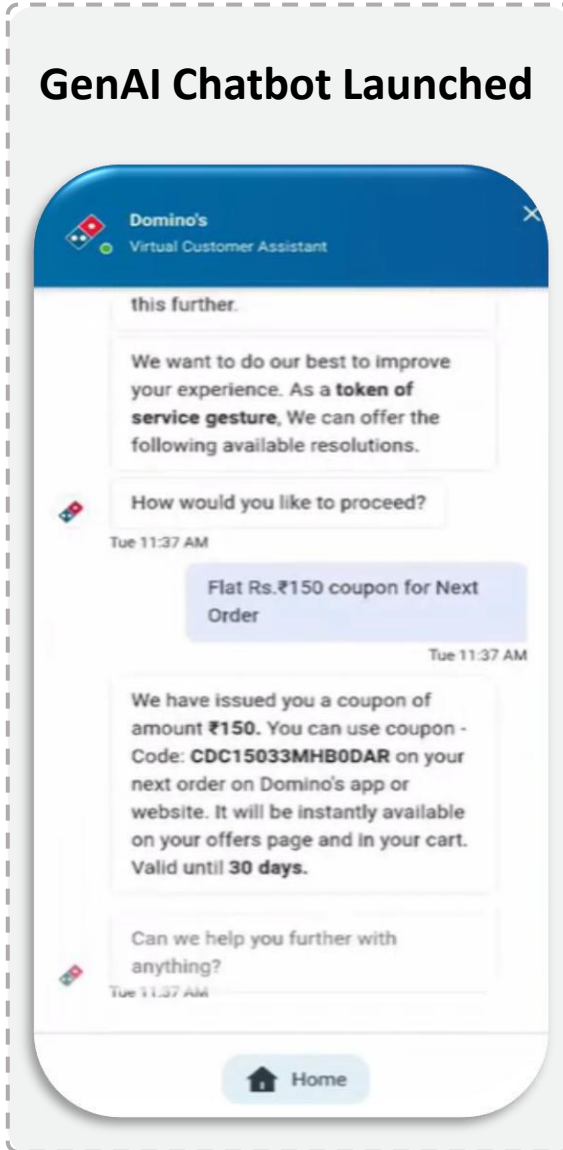
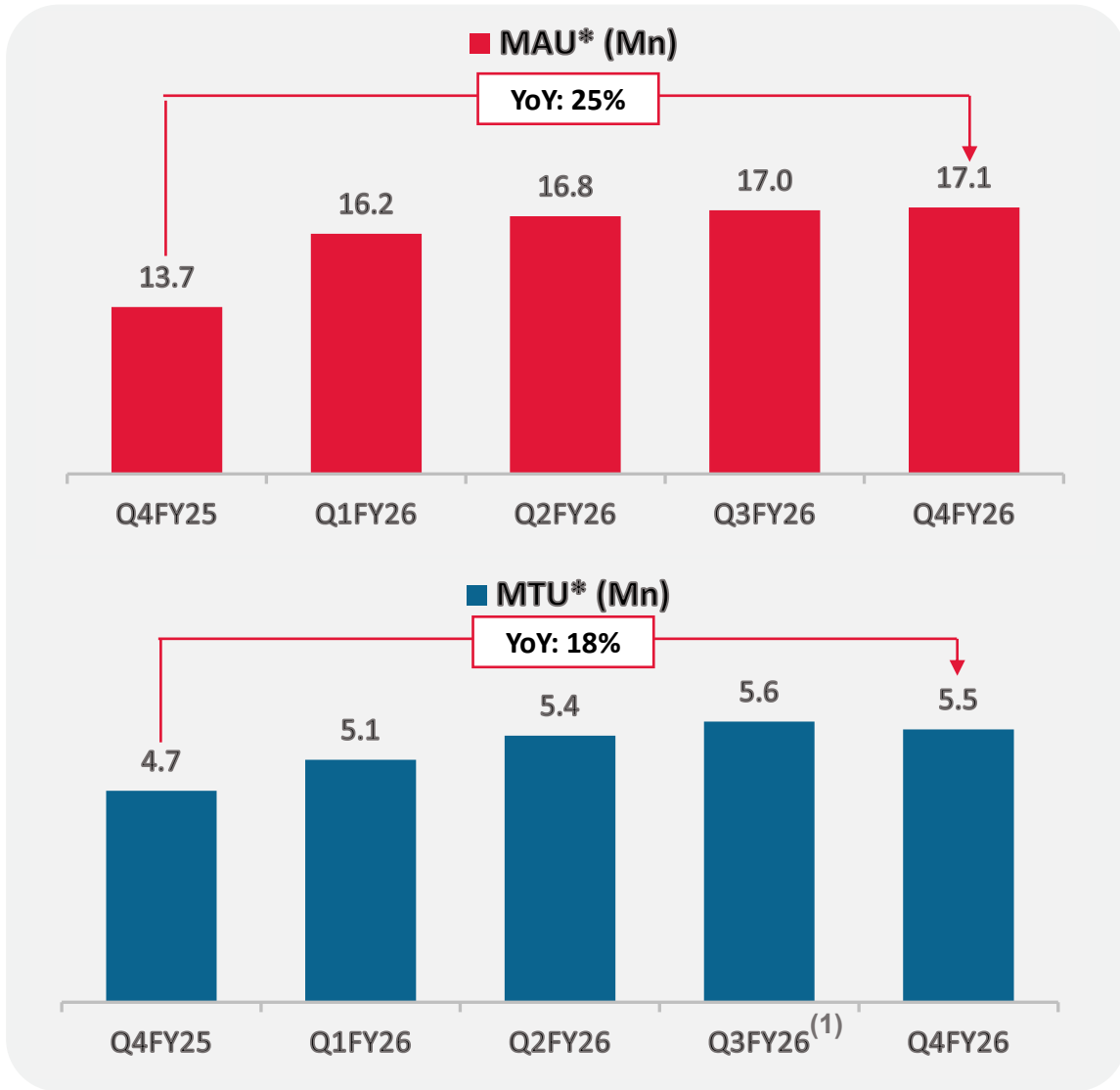
Collab with Gen-Z stars



POPEYES
FAMOUS LOUISIANA CHICKEN

PLOT TWIST:
we've extended the contest!

*TAC apply. Creative visualization. Actual product and quantity may vary. Offer valid at select stores. Applicable only for Non-Vegetarian Products. This product contains added MONOSODIUM GLUTAMATE. NOT RECOMMENDED FOR INFANTS BELOW 12 MONTHS AND PREGNANT WOMEN.



Turkey⁽¹⁾



Particulars (Rs. Mn)	Q4FY26	YoY	QoQ	FY26	YoY
Store Network (#)	981	58	8	981	58
Revenue from Operations	7,644	59.2%	31.8%	24,560	28.8%
PAT ⁽²⁾	576	150.0%	61.1%	2,036	62.4%
PAT Margin (%) ⁽²⁾	7.5%	274 bps	137 bps	8.3%	171 bps

Q4 LFL Growth ⁽³⁾ (%)	Pre-Inflation Adjusted	Inflation Adjusted ⁽⁴⁾
Domino's	42.8%	9.0%
Coffy	18.4%	-9.7%

Highlights

Consistent 7%+ PAT Margins
Stores: Net addition of 8 stores QoQ

- ❖ Strong order growth in Domino's
- ❖ Coffy 5th largest coffee brand in terms of store footprint in Turkey
- ❖ Coffy price index correction put in effect in Q4
- ❖ Improvement in PAT margins on account of re-financing of loan from Lira to Euro
- ❖ Business continues to generate strong cash flows and repatriate dividend

(1) Includes Turkey, Azerbaijan and Georgia

(2) PAT of continued operations before exceptional items

(2) LFL computation in TRY

(3) Inflation adjusted as per IAS 29

Note: DPEU numbers are for continued operations; TRY:INR currency conversion is as on March 31, 2026 for reported INR and are inflation adjusted numbers

İkonix Pizza



Burger Pizza



Cinnamon Roll



Iced Matcha



Valentines Day Muffin



Campaigns during the Quarter

More Tasty Years



We are coming Big



Turkiye Pizza Days



Take Away



App Rewards



International: SL and BAN delivering consistent topline growth



Sri Lanka



Particulars	Q4FY26	YoY	QoQ	FY26	YoY
Stores (#)	53	+3	0	53	+3
Revenue (Rs. Mn)	367	61.4%	3.9%	1,285	64.3%
LFL Growth (%)	52.2%	-	-	59.1%	-

New products launched



Bangladesh



Particulars	Q4FY26	YoY	QoQ	FY26	YoY
Stores (#)	40	+1	0	40	+3
Revenue (Rs. Mn)	209	29.4%	-4.5%	799	27.4%
LFL Growth (%)	12.9%	-	-	10.6%	-

New products launched



3

Q4FY26 & FY26 Statement of Profit and Loss

WHY INDIA LOVES DOMINO'S



-  FREE DELIVERY*
-  NO HIDDEN CHARGES
-  NO PLATFORM FEES
-  FASTEST DELIVERY
-  HOT & FRESH ALWAYS

Terms & Conditions apply*

Quarterly Statement of Profit and Loss – YoY comparison⁽¹⁾

Consolidated			Profit and Loss Metrics Particulars in INR mn	Standalone		
Q4FY26	Q4FY25	Growth %,bps		Q4FY26	Q4FY25	Growth %,bps
24,995	20,950	19.3%	Revenue from operations	16,797	15,790	6.4%
233	106	119.4%	Other Income	71	65	8.2%
25,228	21,056	19.8%	Total Income	16,867	15,855	6.4%
7,130	5,949	19.9%	Raw Material Cost	4,109	4017	2.3%
17,864	15,001	19.1%	Gross Profit	12,687	11,773	7.8%
71.5%	71.6%	-13bps	Margins	75.5%	74.6%	98bps
4,499	3,705	21.4%	Personnel Expenses	2,929	2,694	8.7%
8,516	7377	15.4%	Manufacturing and Other Expenses	6,314	5,989	5.4%
13,015	11,082	17.4%	Total Operating Expense	9,243	8,684	6.4%
4,849	3,919	23.7%	Op. EBITDA	3,444	3,089	11.5%
19.4%	18.7%	69bps	Margin	20.5%	19.6%	94bps
1,175	1,161	1.2%	Interest Cost	745	662	12.5%
2,694	2,097	28.5%	Depreciation	2,077	1737	19.6%
7	6	n.a	Share of Profit/(Loss) in Associate	0	0	n.a
1,220	773	57.8%	PBT from continued operations before exceptional items	693	755	-8.2%
4.9%	3.7%	119bps	Margin	4.1%	4.8%	-66bps
936	559	67.3%	PAT from continued operations before exceptional items	537	553	-2.8%
3.7%	2.7%	107bps	Margin	3.2%	3.5%	-30bps
0	0	n.a	Exceptional Items	0	0	n.A
936	559	67.3%	PAT from continued operations	537	553	-2.8%
3.7%	2.7%	107bps	Margin	3.2%	3.5%	-30bps
-112	-66	n.a.	Profit/(Loss) from discontinued operations	-112	-58	n.a.
824	493	67.1%	PAT	426	495	-13.9%
3.3%	2.4%	94bps	Margin	2.5%	3.1%	-60bps

(1) Post reclassification of Dunkin as discontinued operations in current and previous periods

Quarterly Statement of Profit and Loss – QoQ comparison⁽¹⁾

Consolidated			Profit and Loss Metrics Particulars in INR mn	Standalone		
Q4FY26	Q3FY26	Growth %		Q4FY26	Q3FY26	Growth %
24,995	24,292	2.9%	Revenue from operations	16,797	17,935	-6.3%
233	172	35.6%	Other Income	71	83	-14.7%
25,228	24,464	3.1%	Total Income	16,867	18,017	-6.4%
7,130	6,910	3.2%	Raw Material Cost	4,109	4,501	-8.7%
17,864	17,382	2.8%	Gross Profit	12,687	13,434	-5.6%
71.5%	71.6%	-8bps	Margins	75.5%	74.9%	63bps
4,499	3,968	13.4%	Personnel Expenses	2,929	2,964	-1.2%
8,516	8,576	-0.7%	Manufacturing and Other Expenses	6,314	6,761	-6.6%
13,015	12,544	3.8%	Total Operating Expense	9,243	9,725	-5.0%
4,849	4,838	0.2%	Op. EBITDA	3,444	3,709	-7.1%
19.4%	19.9%	-52bps	Margin	20.5%	20.7%	-17bps
1,175	1,031	14.0%	Interest Cost	745	692	7.6%
2,694	2,468	9.2%	Depreciation	2,077	1,988	4.5%
7	7	n.a	Share of Profit/(Loss) in Associate	0	0	n.a
1,220	1,519	-19.7%	PBT from continued operations before exceptional items	693	1,112	-37.7%
4.9%	6.3%	-137bps	Margin	4.1%	6.2%	-207bps
936	1,003	-6.7%	PAT from continued operations before exceptional items	537	815	-34.0%
3.7%	4.1%	-38bps	Margin	3.2%	4.5%	-134bps
-	337	n.a.	Exceptional Items	-	337	n.a
936	751	24.7%	PAT from continued operations	537	563	-4.5%
3.7%	3.1%	65bps	Margin	3.2%	3.1%	6bps
-112	-22	n.a.	Profit/(Loss) from discontinued operations	-112	-22	n.a.
824	729	13.1%	PAT	426	541	-21.3%
3.3%	3.0%	30bps	Margin	2.5%	3.0%	-48bps

(1) Post reclassification of Dunkin as discontinued operations in current and previous periods

Full Year Statement of Profit and Loss⁽¹⁾

Consolidated			Profit and Loss Metrics Particulars in INR mn	Standalone		
FY26	FY25	Growth %		FY26	FY25	Growth %
95,125	81,045	17.4%	Revenue from operations	68,562	60,674	13.0%
741	737	0.7%	Other Income	350	354	-1.3%
95,866	81,781	17.2%	Total Income	68,912	61,029	12.9%
27,104	22,578	20.0%	Raw Material Cost	17,318	14,915	16.1%
68,021	58,467	16.3%	Gross Profit	51,244	45,760	12.0%
71.5%	72.1%	-63bps	Margins	74.7%	75.4%	-68bps
16,224	13,947	16.3%	Personnel Expenses	11,734	10,622	10.5%
32,919	28,675	14.8%	Manufacturing and Other Expenses	25,780	23,208	11.1%
49,143	42,622	15.3%	Total Operating Expense	37,514	33,830	10.9%
18,878	15,845	19.1%	Op. EBITDA	13,730	11,930	15.1%
19.8%	19.6%	29bps	Margin	20.0%	19.7%	36bps
4,360	5,202	-16.2%	Interest Cost	2,755	2,585	6.6%
9,587	7,954	20.5%	Depreciation	7,643	6,613	15.6%
70	-46	n.a	Share of Profit/(Loss) in Associate	0	0	n.a
5,742	3,380	69.9%	PBT from continued operations before exceptional items	3,681	3,086	19.3%
6.0%	4.2%	187bps	Margin	5.4%	5.1%	28bps
4,113	2,510	63.8%	PAT from continued operations before exceptional items	2,762	2,333	18.4%
4.3%	3.1%	123bps	Margin	4.0%	3.8%	18bps
337	45	n.a	Exceptional Items	337	248	n.a
3,860	2,501	54.4%	PAT from continued operations	2,509	2,121	18.3%
4.1%	3.1%	97bps	Margin	3.7%	3.5%	16bps
582	-329	n.a.	Profit/(Loss) from discontinued operations	-236	-180	n.a.
4,442	2,171	104.6%	PAT	2,273	1,941	17.1%
4.7%	2.7%	199bps	Margin	3.3%	3.2%	12bps

(1) Post reclassification of Dunkin as discontinued operations in current and previous periods



Appendix

Domino's
LAUNCHING

mousse mania

BLUEBERRY

BUTTERSCOTCH

CHOCOLATE

AVAILABLE @
₹ 49

Images are for representation purpose only

POPEYES
FAMOUS LOUISIANA CHICKEN

Punjabi chicken lovers

show us your real Popeyes bite.



Responsible Sourcing



Empowering dairy farmers with expert guidance



Localized Corn sourcing



100% farm traceability for chicken, oregano, chili, basil and tomato paste



No Antibiotics Ever milestone

Baking Goodness



All ingredients are 100% free from artificial preservatives, colors and flavors for Domino's



100% dairy-based mozzarella cheese



99% food ingredients certified under GFSI for Dominos



100% recyclable pizza boxes and lid-less dine-in boxes

Benefit People and Communities



~**34%** of workforce are women



Medical health care access to **1,200,000+** people



Training and veterinary support to **14,000+** farmers



Trained ~**13,000+** cumulative students under **J-FARM**



Trained ~ **5000+** street vendors on food safety skills

Emissions, Energy and Waste Management



~**67%** of fleet is EV and is on an increasing trend



Eliminated **single-use** plastic



Commissary electricity needs being **partially fulfilled** by **renewable** energy



Co-processing "Used Cooking Oil" to **Bio-fuel**

Jubilant FoodWorks Limited (JFL Group/Group), incorporated in 1995, ranks among the leading emerging markets' food-tech companies. Its Group network comprises 3,636 stores across six markets – India, Turkey, Bangladesh, Sri Lanka, Azerbaijan and Georgia. The Group has a strong portfolio of brands in emerging markets with franchise rights for two global brands - Domino's and Popeyes – and two own-brands, Hong's Kitchen, an Indo-Chinese QSR brand in India, and a CAFÉ brand - COFFY in Turkey.

Note: The store count for the Group is as on March 31, 2025, post reclassification of Dunkin as discontinued operations. As of March 31, 2026 – Dunkin had 27 stores operating

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Note: 1. All financial data in this presentation are derived from audited consolidated and standalone IND-AS financial statements for continuing operations until specified otherwise

2. Due to rounding-off, the financial figures may not recalculate exactly
3. All growth comparisons are vs. prior year and all network addition pertains to net stores added during the specified period unless specified otherwise
4. TRY:INR is as per currency conversion on March 31, 2026. Turkey financials are reported as per IAS 29 – Hyperinflation adjusted accounting
5. The growth % for Bangladesh and Sri Lanka is computed on reported financials in INR
6. PBT and PAT margins are on revenue from operations

Disclaimer

Certain statements in this presentation may be forward-looking statements. Such forward-looking statements are subject to certain risks and uncertainties like government actions, local political or economic developments, technological risks, and many other factors that could cause our actual results to differ materially from those contemplated by the relevant forward-looking statements. JFL will not be in any way responsible for any action taken based on such statements and undertakes no obligation to publicly update these forward-looking statements to reflect subsequent events or circumstances