



Discussion Materials

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# Illustrative DIP Liquidity Analysis through Jan-22 – High Case Mexico

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	
(P\$ in thousands)	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
Month	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Total
Month Ending Date	08/27/21	10/01/21	10/29/21	11/26/21	12/31/21	01/28/22	
<b>Collections</b>							
Mexico Collections	\$ 60,671	\$ 73,478	\$ 66,605	\$ 52,169	\$ 93,852	\$ 54,356	\$ 401,131
<b>Total Net Collections</b>	<b>60,671</b>	<b>73,478</b>	<b>66,605</b>	<b>52,169</b>	<b>93,852</b>	<b>54,356</b>	<b>401,131</b>
<b>Disbursements</b>							
<b>Operating Disbursements</b>							
Payroll and Benefits	(10,356)	(19,913)	(5,727)	(2,951)	(11,754)	(2,771)	(53,472)
Sales Forces & Collections Fees	(3,350)	(3,512)	(3,312)	(3,312)	(3,512)	(3,312)	(20,309)
Broker Fees	(12,584)	(10,884)	(8,515)	379	(11,586)	(2,722)	(45,911)
Professional Fees	(8,096)	(11,143)	(7,366)	(7,537)	(10,074)	(6,521)	(50,736)
Other Operating Disbursements	(8,718)	(15,832)	(7,763)	(10,890)	(13,172)	(11,456)	(67,831)
Other SG&A Expenses	(1,343)	(1,190)	(694)	(694)	(868)	(694)	(5,484)
Other Contingency	(100)	(4,293)	(3,273)	(5,880)	(5,880)	(8,880)	(28,305)
Taxes	(19,605)	(15,179)	(15,819)	(15,798)	(15,798)	(33,648)	(115,848)
<b>Total Operating Disbursements</b>	<b>(64,153)</b>	<b>(81,945)</b>	<b>(52,467)</b>	<b>(46,683)</b>	<b>(72,644)</b>	<b>(70,004)</b>	<b>(387,895)</b>
<b>Net Cash Flow from Operations</b>	<b>\$ (3,481)</b>	<b>\$ (8,466)</b>	<b>\$ 14,138</b>	<b>\$ 5,485</b>	<b>\$ 21,207</b>	<b>\$ (15,647)</b>	<b>\$ 13,236</b>
Origination							-
<b>Net Cash Flow after Origination</b>	<b>\$ (3,481)</b>	<b>\$ (8,466)</b>	<b>\$ 14,138</b>	<b>\$ 5,485</b>	<b>\$ 21,207</b>	<b>\$ (15,647)</b>	<b>\$ 13,236</b>
<b>Non-Operating Disbursements</b>							
Principal Payments	(200)	(4,393)	(3,373)	(5,980)	(5,980)	(8,980)	-
Interest / Fee Payments	-	-	-	-	-	-	-
Restructuring Professionals	(31,600)	(24,408)	(22,628)	(19,570)	(19,570)	(59,570)	(177,345)
Other Restructuring Costs	(60,000)	(93,628)	(18,726)	-	(100,000)	-	(272,353)
Non-Operating Inflows	20	26	20	20	26	20	133
<b>Total Non-Operating Disbursements</b>	<b>(91,580)</b>	<b>(118,010)</b>	<b>(41,333)</b>	<b>(19,550)</b>	<b>(119,544)</b>	<b>(59,550)</b>	<b>(449,566)</b>
<b>Total Net Cash Flow</b>	<b>\$ (95,061)</b>	<b>\$ (126,476)</b>	<b>\$ (27,195)</b>	<b>\$ (14,064)</b>	<b>\$ (98,337)</b>	<b>\$ (75,197)</b>	<b>\$ (436,330)</b>
<b>LIQUIDITY</b>							
<b>Beginning Cash Balance - Available</b>	<b>\$ 32,580</b>	<b>\$ (62,481)</b>	<b>\$ (188,957)</b>	<b>\$ (216,152)</b>	<b>\$ (230,216)</b>	<b>\$ (328,553)</b>	<b>\$ 32,580</b>
Net Cash Flow	(95,061)	(126,476)	(27,195)	(14,064)	(98,337)	(75,197)	(436,330)
FX Variance	-	-	-	-	-	-	-
<b>Ending Cash Balance - Available</b>	<b>\$ (62,481)</b>	<b>\$ (188,957)</b>	<b>\$ (216,152)</b>	<b>\$ (230,216)</b>	<b>\$ (328,553)</b>	<b>\$ (403,750)</b>	<b>\$ (403,750)</b>
<b>Restricted Cash</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>

## Notes

1 Excludes any assumption for repayment by Colombia to Mexico of USD\$55M outstanding unsecured intercompany loan

# Illustrative DIP Liquidity Analysis through Jan-22 – Low Case Mexico

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	
(P\$ in thousands)	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
Month	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Total
Month Ending Date	08/27/21	10/01/21	10/29/21	11/26/21	12/31/21	01/28/22	
<b>Collections</b>							
Mexico Collections	\$ 26,371	\$ 47,870	\$ 52,366	\$ 53,777	\$ 67,815	\$ 37,395	\$ 285,593
<b>Total Net Collections</b>	<b>26,371</b>	<b>47,870</b>	<b>52,366</b>	<b>53,777</b>	<b>67,815</b>	<b>37,395</b>	<b>285,593</b>
<b>Disbursements</b>							
<b>Operating Disbursements</b>							
Payroll and Benefits	(10,356)	(19,913)	(5,727)	(2,951)	(11,754)	(2,771)	(53,472)
Sales Forces & Collections Fees	(3,350)	(3,512)	(3,312)	(3,312)	(3,512)	(3,312)	(20,309)
Broker Fees	(12,584)	(10,884)	(8,515)	379	(11,586)	(2,722)	(45,911)
Professional Fees	(8,096)	(11,143)	(7,366)	(7,537)	(10,074)	(6,521)	(50,736)
Other Operating Disbursements	(9,810)	(15,832)	(7,763)	(10,890)	(13,172)	(11,456)	(68,923)
Other SG&A Expenses	(1,545)	(1,190)	(694)	(694)	(868)	(694)	(5,686)
Other Contingency	(100)	(4,293)	(3,273)	(5,880)	(5,880)	(8,880)	(28,305)
Taxes	(19,605)	(15,179)	(15,819)	(15,798)	(15,798)	(33,648)	(115,848)
<b>Total Operating Disbursements</b>	<b>(65,446)</b>	<b>(81,945)</b>	<b>(52,467)</b>	<b>(46,683)</b>	<b>(72,644)</b>	<b>(70,004)</b>	<b>(389,189)</b>
<b>Net Cash Flow from Operations</b>	<b>\$ (39,075)</b>	<b>\$ (34,075)</b>	<b>\$ (101)</b>	<b>\$ 7,093</b>	<b>\$ (4,830)</b>	<b>\$ (32,608)</b>	<b>\$ (103,596)</b>
Origination	-	-	-	-	-	-	-
<b>Net Cash Flow after Origination</b>	<b>\$ (39,075)</b>	<b>\$ (34,075)</b>	<b>\$ (101)</b>	<b>\$ 7,093</b>	<b>\$ (4,830)</b>	<b>\$ (32,608)</b>	<b>\$ (103,596)</b>
<b>Non-Operating Disbursements</b>							
Principal Payments	-	-	-	-	-	-	-
Interest / Fee Payments	-	-	-	-	-	-	-
Restructuring Professionals	(31,600)	(24,408)	(22,628)	(19,570)	(19,570)	(59,570)	(177,345)
Other Restructuring Costs	(100,000)	(93,628)	(18,726)	-	(100,000)	-	(312,353)
Non-Operating Inflows	20	26	20	20	26	20	133
<b>Total Non-Operating Disbursements</b>	<b>(131,580)</b>	<b>(118,010)</b>	<b>(41,333)</b>	<b>(19,550)</b>	<b>(119,544)</b>	<b>(59,550)</b>	<b>(489,566)</b>
<b>Total Net Cash Flow</b>	<b>\$ (170,655)</b>	<b>\$ (152,085)</b>	<b>\$ (41,434)</b>	<b>\$ (12,456)</b>	<b>\$ (124,374)</b>	<b>\$ (92,158)</b>	<b>\$ (593,162)</b>
<b>LIQUIDITY</b>							
<b>Beginning Cash Balance - Available</b>	<b>\$ (6,441)</b>	<b>\$ (177,096)</b>	<b>\$ (329,180)</b>	<b>\$ (370,614)</b>	<b>\$ (383,070)</b>	<b>\$ (507,444)</b>	<b>\$ (6,441)</b>
Net Cash Flow	(170,655)	(152,085)	(41,434)	(12,456)	(124,374)	(92,158)	(593,162)
FX Variance	-	-	-	-	-	-	-
<b>Ending Cash Balance - Available</b>	<b>\$ (177,096)</b>	<b>\$ (329,180)</b>	<b>\$ (370,614)</b>	<b>\$ (383,070)</b>	<b>\$ (507,444)</b>	<b>\$ (599,602)</b>	<b>\$ (599,602)</b>
<b>Restricted Cash</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>	<b>176,083</b>

## Notes

1 Excludes any assumption for repayment by Colombia to Mexico of USD\$55M outstanding unsecured intercompany loan

# Illustrative DIP Liquidity Analysis through Jan-22 – High Case Colombia

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	
(P\$ in thousands)	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
Month	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Total
Month Ending Date	08/27/21	10/01/21	10/29/21	11/26/21	12/31/21	01/28/22	
<b>Collections</b>							
Colombia Collections	\$ 263,163	\$ 260,924	\$ 187,143	\$ 183,049	\$ 179,880	\$ 192,889	\$ 1,267,049
<b>Total Net Collections</b>	<b>263,163</b>	<b>260,924</b>	<b>187,143</b>	<b>183,049</b>	<b>179,880</b>	<b>192,889</b>	<b>1,267,049</b>
<b>Disbursements</b>							
<b>Operating Disbursements</b>							
Payroll and Benefits	(3,261)	(4,278)	(1,496)	(585)	(2,031)	(771)	(12,421)
Sales Forces & Collections Fees	(5,258)	(2,854)	(450)	(2,854)	(5,258)	(450)	(17,125)
Broker Fees	-	-	-	-	-	-	-
Professional Fees	(368)	(395)	(400)	(404)	(400)	(385)	(2,352)
Other Operating Disbursements	(1,377)	(2,503)	(2,380)	(2,352)	(2,370)	(1,315)	(12,296)
Other SG&A Expenses	-	-	-	-	-	-	-
Other Contingency	-	-	(100)	(10,314)	(8,884)	(12,179)	(31,476)
Taxes	(10,124)	(20,574)	(3,875)	(10,575)	(5,575)	(8,976)	(59,700)
<b>Total Operating Disbursements</b>	<b>(20,389)</b>	<b>(30,604)</b>	<b>(8,700)</b>	<b>(27,084)</b>	<b>(24,518)</b>	<b>(24,076)</b>	<b>(135,370)</b>
<b>Net Cash Flow from Operations</b>	<b>\$ 242,774</b>	<b>\$ 230,321</b>	<b>\$ 178,443</b>	<b>\$ 155,965</b>	<b>\$ 155,362</b>	<b>\$ 168,814</b>	<b>\$ 1,131,679</b>
Origination	(2,225)	-	-	-	-	-	(2,225)
<b>Net Cash Flow after Origination</b>	<b>\$ 240,550</b>	<b>\$ 230,321</b>	<b>\$ 178,443</b>	<b>\$ 155,965</b>	<b>\$ 155,362</b>	<b>\$ 168,814</b>	<b>\$ 1,129,454</b>
<b>Non-Operating Disbursements</b>							
Principal Payments	-	-	-	-	-	-	-
Interest / Fee Payments	-	-	-	-	-	-	-
Restructuring Professionals	(7,082)	(12,582)	(99,775)	(76,502)	(62,991)	(87,827)	(346,758)
Other Restructuring Costs	(40,000)	(8,001)	(1,600)	-	(30,000)	-	(79,601)
Non-Operating Inflows	-	-	-	-	-	-	-
<b>Total Non-Operating Disbursements</b>	<b>(47,082)</b>	<b>(20,582)</b>	<b>(101,375)</b>	<b>(76,502)</b>	<b>(92,991)</b>	<b>(87,827)</b>	<b>(426,359)</b>
<b>Total Net Cash Flow</b>	<b>\$ 193,468</b>	<b>\$ 209,738</b>	<b>\$ 77,068</b>	<b>\$ 79,463</b>	<b>\$ 62,372</b>	<b>\$ 80,986</b>	<b>\$ 703,096</b>
<b>LIQUIDITY</b>							
<b>Beginning Cash Balance - Available</b>	<b>\$ 134,379</b>	<b>\$ 327,847</b>	<b>\$ 537,586</b>	<b>\$ 614,654</b>	<b>\$ 694,117</b>	<b>\$ 756,488</b>	<b>\$ 134,379</b>
Net Cash Flow	193,468	209,738	77,068	79,463	62,372	80,986	703,096
FX Variance	-	-	-	-	-	-	-
<b>Ending Cash Balance - Available</b>	<b>\$ 327,847</b>	<b>\$ 537,586</b>	<b>\$ 614,654</b>	<b>\$ 694,117</b>	<b>\$ 756,488</b>	<b>\$ 837,475</b>	<b>\$ 837,475</b>
<b>Restricted Cash</b>	<b>166</b>	<b>166</b>	<b>166</b>	<b>166</b>	<b>166</b>	<b>166</b>	<b>166</b>

## Notes

1 Excludes any assumption for repayment by Colombia to Mexico of USD\$55M outstanding unsecured intercompany loan

# Illustrative DIP Liquidity Analysis through Jan-22 – Low Case Colombia

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	
(P\$ in thousands)	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
Month	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Total
Month Ending Date	08/27/21	10/01/21	10/29/21	11/26/21	12/31/21	01/28/22	
<b>Collections</b>							
Colombia Collections	\$ 165,978	\$ 163,041	\$ 160,647	\$ 158,613	\$ 157,303	\$ 169,703	\$ 975,286
<b>Total Net Collections</b>	<b>165,978</b>	<b>163,041</b>	<b>160,647</b>	<b>158,613</b>	<b>157,303</b>	<b>169,703</b>	<b>975,286</b>
<b>Disbursements</b>							
<b>Operating Disbursements</b>							
Payroll and Benefits	(3,261)	(4,278)	(1,496)	(585)	(2,031)	(771)	(12,421)
Sales Forces & Collections Fees	(5,258)	(2,854)	(450)	(2,854)	(5,258)	(450)	(17,125)
Broker Fees	-	-	-	-	-	-	-
Professional Fees	(821)	(395)	(400)	(404)	(400)	(385)	(2,805)
Other Operating Disbursements	(1,528)	(2,503)	(2,380)	(2,352)	(2,370)	(1,315)	(12,448)
Other SG&A Expenses	-	-	-	-	-	-	-
Other Contingency	-	-	(100)	(10,314)	(8,884)	(12,179)	(31,476)
Taxes	(10,124)	(20,574)	(3,875)	(10,575)	(5,575)	(8,976)	(59,700)
<b>Total Operating Disbursements</b>	<b>(20,993)</b>	<b>(30,604)</b>	<b>(8,700)</b>	<b>(27,084)</b>	<b>(24,518)</b>	<b>(24,076)</b>	<b>(135,975)</b>
<b>Net Cash Flow from Operations</b>	<b>\$ 144,984</b>	<b>\$ 132,438</b>	<b>\$ 151,947</b>	<b>\$ 131,529</b>	<b>\$ 132,785</b>	<b>\$ 145,628</b>	<b>\$ 839,311</b>
Origination	(2,225)	-	-	-	-	-	(2,225)
<b>Net Cash Flow after Origination</b>	<b>\$ 142,760</b>	<b>\$ 132,438</b>	<b>\$ 151,947</b>	<b>\$ 131,529</b>	<b>\$ 132,785</b>	<b>\$ 145,628</b>	<b>\$ 837,086</b>
<b>Non-Operating Disbursements</b>							
Principal Payments	-	-	-	-	-	-	-
Interest / Fee Payments	-	-	-	-	-	-	-
Restructuring Professionals	(7,082)	(12,582)	(99,775)	(76,502)	(62,991)	(87,827)	(346,758)
Other Restructuring Costs	(60,000)	(8,001)	(1,600)	-	(70,000)	-	(139,601)
Non-Operating Inflows	-	-	-	-	-	-	-
<b>Total Non-Operating Disbursements</b>	<b>(67,082)</b>	<b>(20,582)</b>	<b>(101,375)</b>	<b>(76,502)</b>	<b>(132,991)</b>	<b>(87,827)</b>	<b>(486,359)</b>
<b>Total Net Cash Flow</b>	<b>\$ 75,678</b>	<b>\$ 111,856</b>	<b>\$ 50,572</b>	<b>\$ 55,026</b>	<b>\$ (205)</b>	<b>\$ 57,801</b>	<b>\$ 350,727</b>
<b>LIQUIDITY</b>							
<b>Beginning Cash Balance - Available</b>	<b>\$ 69,698</b>	<b>\$ 145,376</b>	<b>\$ 257,231</b>	<b>\$ 307,803</b>	<b>\$ 362,829</b>	<b>\$ 362,624</b>	<b>\$ 69,698</b>
Net Cash Flow	75,678	111,856	50,572	55,026	(205)	57,801	350,727
FX Variance	-	-	-	-	-	-	-
<b>Ending Cash Balance - Available</b>	<b>\$ 145,376</b>	<b>\$ 257,231</b>	<b>\$ 307,803</b>	<b>\$ 362,829</b>	<b>\$ 362,624</b>	<b>\$ 420,425</b>	<b>\$ 420,425</b>
<b>Restricted Cash</b>	<b>166</b>	<b>166</b>	<b>166</b>	<b>166</b>	<b>166</b>	<b>166</b>	<b>166</b>

## Notes

1 Excludes any assumption for repayment by Colombia to Mexico of USD\$55M outstanding unsecured intercompany loan

# Overview of Mexico Restructuring Professional Fees Accrued over the Period

(MXN\$)	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	
Month	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Total
<b><u>Restructuring Professionals<sup>1</sup></u></b>							
AlixPartners	\$ 8,400,000	\$ 6,120,000	\$ 6,120,000	\$ 4,320,000	\$ 4,320,000	\$ 4,320,000	\$ 33,600,000
White & Case	5,000,000	2,800,000	1,700,000	1,600,000	1,600,000	1,600,000	14,300,000
Rothschild	1,250,000	1,250,000	1,250,000	1,250,000	1,250,000	1,250,000	7,500,000
Other Company Advisors	16,950,000	14,237,500	13,557,500	12,400,000	12,400,000	12,400,000	81,945,000
Other Concurso Related Costs	-	-	-	-	-	40,000,000	40,000,000
<b>Total Restructuring Professionals Fees</b>	<b>\$ 31,600,000</b>	<b>\$ 24,407,500</b>	<b>\$ 22,627,500</b>	<b>\$ 19,570,000</b>	<b>\$ 19,570,000</b>	<b>\$ 59,570,000</b>	<b>\$ 177,345,000</b>
<b>Total Restructuring Professionals Fees USD\$</b>	<b>\$ 1,593,545</b>	<b>\$ 1,230,837</b>	<b>\$ 1,141,074</b>	<b>\$ 986,889</b>	<b>\$ 986,889</b>	<b>\$ 3,004,034</b>	<b>\$ 8,943,268</b>

## Notes

1 Restructuring Professional Fees do not include transaction or back-end fees

# Overview of Colombia Restructuring Professional Fees Accrued over the Period

(MXN\$)	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	
Month	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Total
<b><u>Restructuring Professionals<sup>1</sup></u></b>							
AlixPartners	\$ 15,300,000	\$ 15,725,000	\$ 12,155,000	\$ 12,240,000	\$ 12,240,000	\$ 7,150,000	\$ 74,810,000
White & Case	20,000,000	17,000,000	12,750,000	13,600,000	13,600,000	7,500,000	84,450,000
Rothschild	1,250,000	1,250,000	1,250,000	1,250,000	1,250,000	1,250,000	7,500,000
Richards Layton Finger PA	2,000,000	1,700,000	1,700,000	1,600,000	1,600,000	1,000,000	9,600,000
Other Company Advisors	14,842,857	10,916,429	10,066,429	11,874,286	8,905,714	8,460,714	65,066,429
Skadden Arps Slate Meagher Flom LLP	12,000,000	5,600,000	2,500,000	2,500,000	2,500,000	2,500,000	27,600,000
Board Director	-	-	5,000,000	-	-	5,000,000	10,000,000
PricewaterhouseCoopers Advisory Services LLC	7,000,000	-	-	-	-	-	7,000,000
Lender Advisors	8,581,680	8,581,680	8,581,680	8,581,680	8,581,680	10,081,680	52,990,080
UCC Advisors	10,000,000	10,000,000	10,000,000	8,000,000	8,000,000	8,000,000	54,000,000
Other Restructuring Fees	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	4,000,000	24,000,000
<b>Total Restructuring Professionals Fees</b>	<b>\$ 94,974,537</b>	<b>\$ 74,773,109</b>	<b>\$ 68,003,109</b>	<b>\$ 63,645,966</b>	<b>\$ 60,677,394</b>	<b>\$ 54,942,394</b>	<b>\$ 417,016,509</b>
<b>Total Restructuring Professionals Fees USD\$</b>	<b>\$ 4,748,727</b>	<b>\$ 3,738,655</b>	<b>\$ 3,400,155</b>	<b>\$ 3,182,298</b>	<b>\$ 3,033,870</b>	<b>\$ 2,747,120</b>	<b>\$ 20,850,825</b>

## Notes

1 Restructuring Professional Fees do not include transaction or back-end fees