

August 11, 2022

BSE Limited
Floor 25, Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai-400001
Security Code- 539978

National Stock Exchange of India Limited
"Exchange Plaza", Bandra-Kurla Complex,
Bandra (East),
Mumbai-400051
NSE Symbol- QUESS

Dear Sir / Madam,

Sub: Investors Presentation

Pursuant to Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, we are enclosing herewith Investor's presentation on the financial performance of Quess Corp Limited ("Company") for the first quarter ended June 30, 2022.

The above said presentation is also made available on the Company's website <https://www.uesscorp.com/investor-other-information/>.

Kindly take the same on record.

Thanking You,

Yours sincerely,
For Quess Corp Limited



Kundan K.Lal
Company Secretary & Compliance Officer



Encl. a/a



2021
Largest Global
Staffing Firms



Investor Presentation

Q1'FY23

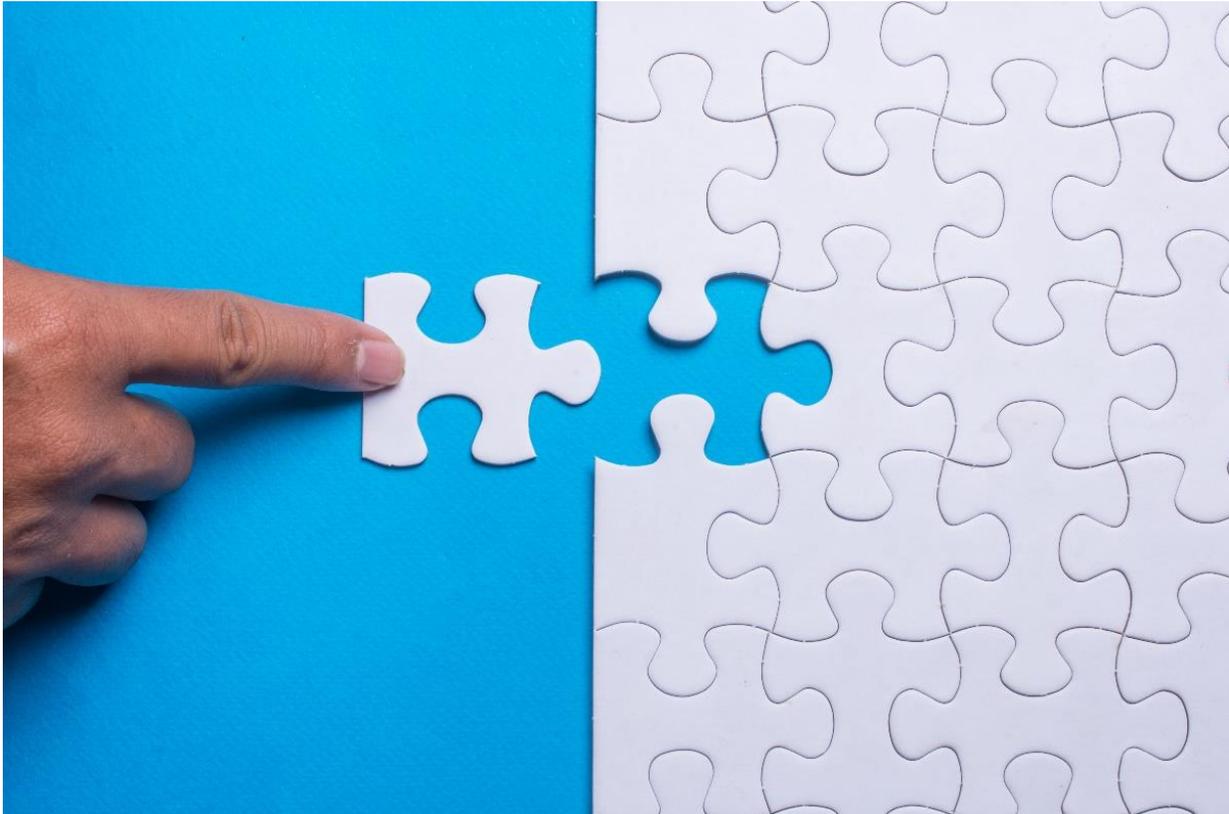
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Best ever quarter by Headcount Addition, PAT up **52% YoY**

Leading domestic private sector employer,
with **~470,000 FTE**

Q1 FY23 – Highlights

	Q1 FY23	YoY Change
Headcount	470k	↑ 27%
Revenue	₹ 3,979 cr.	↑ 33%
EBITDA	₹ 153 cr.	↑ 4%
% EBITDA	3.85%	↓ 106 bps
PAT	₹ 68 cr.	↑ 52%

	Q1 FY23	YoY Change
OCF	₹ 65 cr.	↓ 26%
Net Debt / (cash)	₹ 59 cr.	↓ ₹ 92 cr.
RoE	10.3%	↑ 288bps
Book value per share	₹ 166.4	↑ 7%
EPS (dil.)	₹ 4.5	↑ 46%

Q1 FY23 Business Highlights

- ▶ **General Staffing:** Associate headcount crossed 300k
- ▶ **Cross sell initiatives:** Yielded 32 wins and **ACV of over ₹ 160 cr**
- ▶ **Qjobs:** Total users reached **5 million**
- ▶ **Great Place to Work:** Quess is now amongst India's Top 100 Best Companies to Work For - **Ranked 98 by GPTW**
- ▶ **Corporate Action:** Board approved the Scheme of Amalgamation which *inter-alia* provides for the merger of Allsec into Quess
- ▶ **Capital Allocation:** Announced and paid the interim dividend of **₹ 4 per share** for the Financial Year 2021-22

Q1FY23 – Financial Highlights

Revenue → ₹ 3,979cr ↑ 33% YoY

EBITDA → ₹ 153cr ↑ 4% YoY

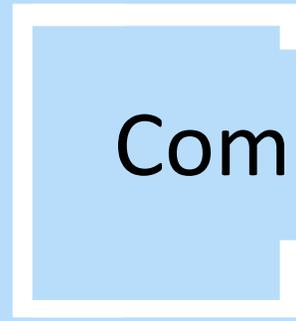
EBITDA % → 3.9 %

PAT → ₹ 68cr ↑ 52% YoY

OCF → ₹ 65cr 56% of Operating EBITDA

	Revenue % Growth	EBITDA % Growth
Workforce Management	2,758 ₹ cr 33% YoY	94 ₹ cr 29% YoY
Global Technology Solutions	507 ₹ cr 29% YoY	83 ₹ cr 30% YoY
Operating Asset Management	597 ₹ cr 29% YoY	30 ₹ cr -26% YoY
Product Led Business	117 ₹ cr 109% YoY	-24 ₹ cr -200% YoY

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Company Overview



From HR Services to a **digitally-enabled Services Platform**



HR Services

Business Services

Platforms

Phases



2007 - 2013

2014 - 2020

2020 - present

HC

61,000

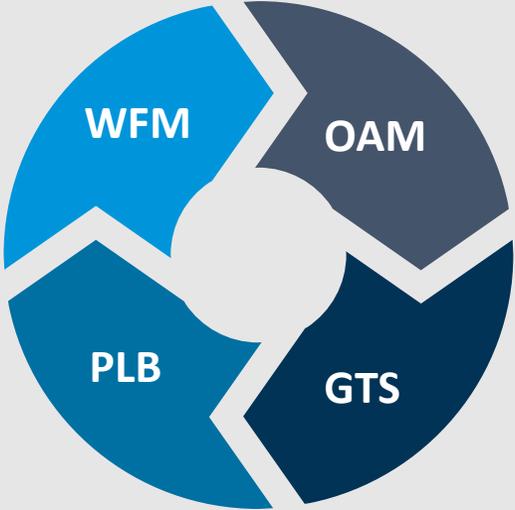
384,000

470,000

Services

- Staffing
- Skilling
- Recruitment
- Facility Management

- Staffing
- Skilling
- Recruitment
- Facility Management
- Security Services
- Industrials
- BPO/CLM + HRO
- Tech services
- Job Portal
- Break-fix services



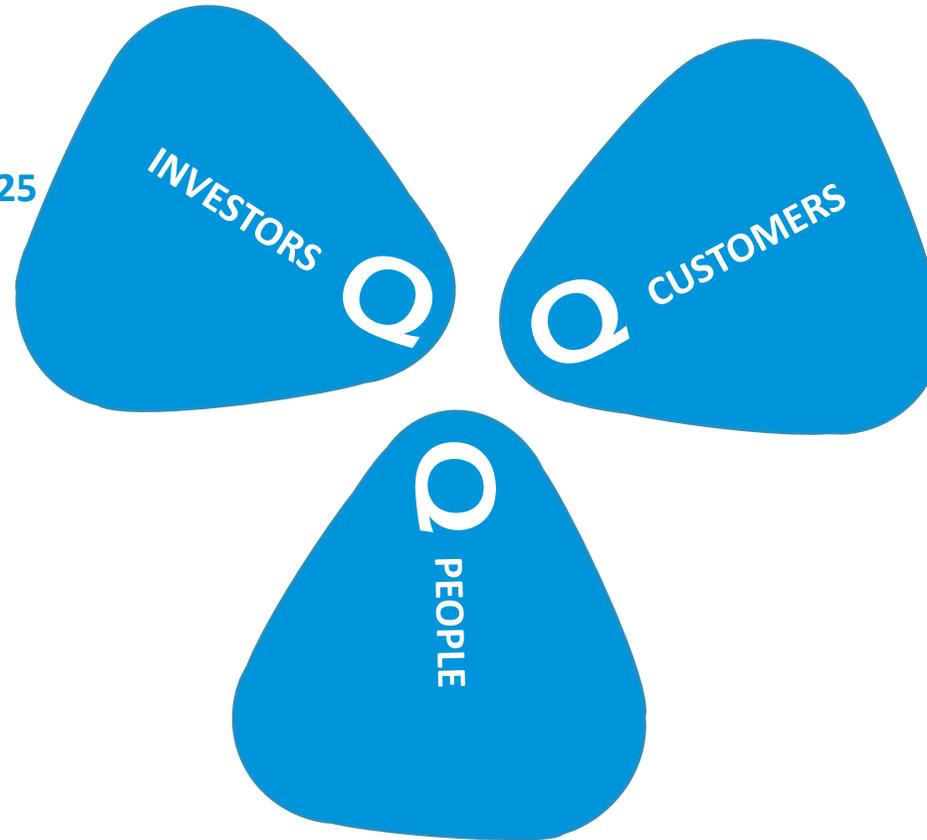
Our operations are spread across synergistic platforms

QUESS



We are a leading service provider in India for most of the services provided

Our focus is on **Winning Together** with our Customers, People and Investors

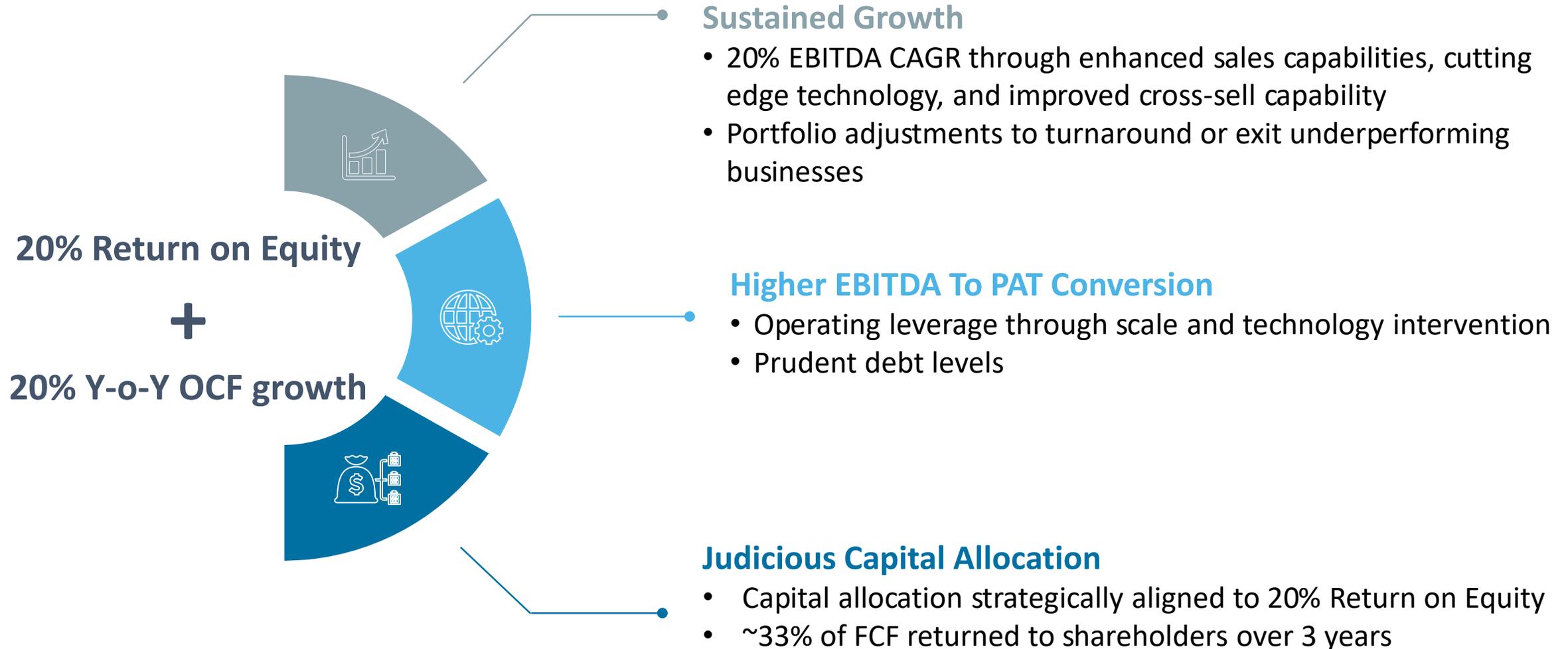


- Achieving and sustaining **25% RoE by FY25**
- Continue **Delivering 20% CAGR on OCF**
- Aspirational EBITDA of **6% by 2025**

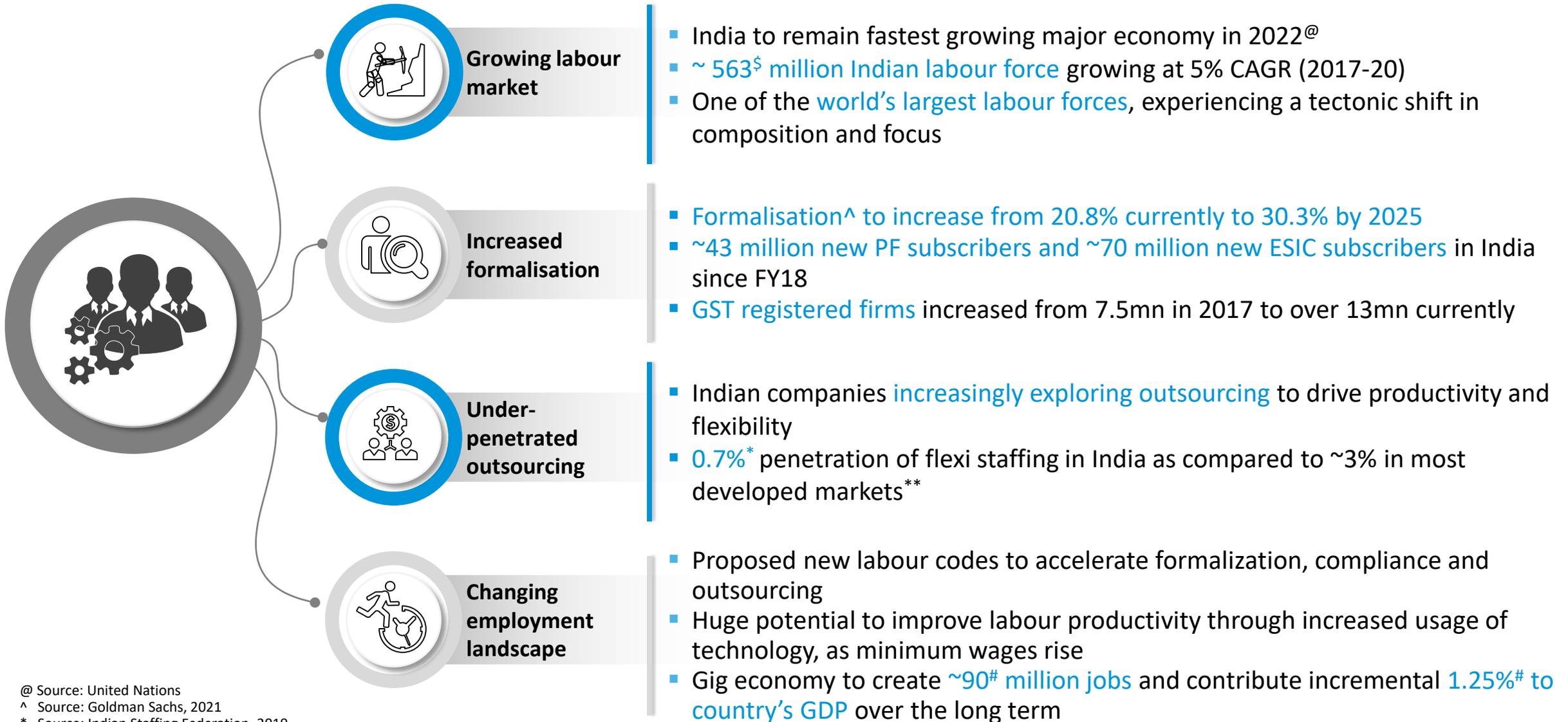
- **Build Scale - single operating platforms** for all organic business, brings in agility and speed in the way we work
- **Measure digital revenues separately**
- **Annual CSAT** across all business

- Becoming India's **Top 50 Great Place To Work**
- Women to constitute **50% of core workforce**
- Benefits coverage for Associates to cover **>70% of Associates**

Winning with Investors: The path to 20%



We enjoy massive macroeconomic tailwinds



@ Source: United Nations

^ Source: Goldman Sachs, 2021

* Source: Indian Staffing Federation, 2019

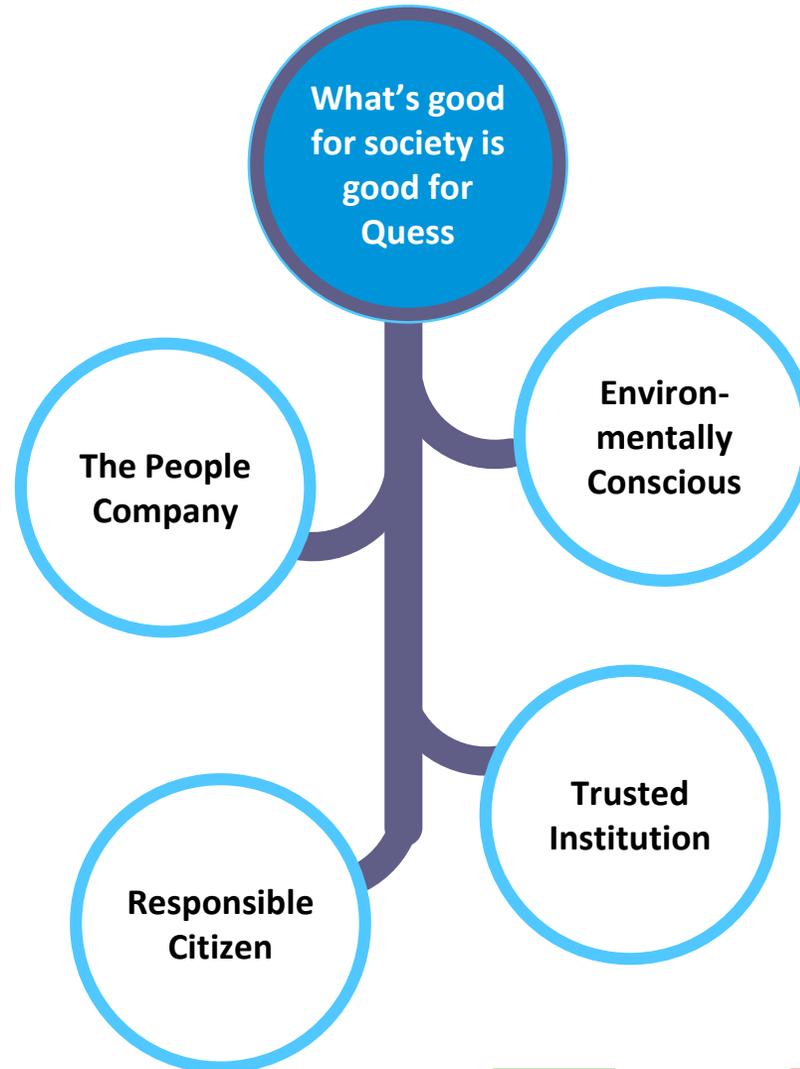
** Source: World Employment Confederation

Source: Boston Consulting Group, 2021

§ Economic Survey 2021-22

We have a defined ESG framework

- **>93,400 employees** hired in FY22 enjoyed first time social security benefits
- **~144,250 employees (~33%)** employed in Q4'FY22 from outside Tier 1 and Tier 2 cities
- **~17% of our ~437K employees (~29% of core)** are women as on 31 March 2021
- In internal employee satisfaction survey, **83% rated themselves Very Satisfied or Satisfied with Quess**
- **Infrastructure renovation for 74 schools** was carried out **benefiting 13,741 students** and teachers
- School Health Program: **12,903 students & 267 teachers** were provided Drinking water facility
- Committed to a CSR grant of **INR 15cr over 4 years** towards building a 350 bed paediatric hospital at CMC Vellore



- **6.0 million sq. ft.** of green spaces maintained across India in FY22
- Business model drives **e-waste reduction** - ~1million devices repaired by QDigi in FY22
- **Responsible waste management**, including ~10,700 kgs of e-waste and ~10,300 kgs of paper waste shredded and recycled in FY22
- **Industry-leading business processes, with digital platform to provide training** to our workforce on Ethical standards such as Code of Conduct, Anti-Bribery & Corruption, POSH, Whistle Blower, etc.
- **Cyber-Security Council formed** with executive level oversight
- Quess Corp and our large subs (AllSec and Conneqt) are **ISO 27001:2013 certified**



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Key Corporate and Financial
Updates

Update on Q1 operating environment

Positive hiring environment in certain segments...

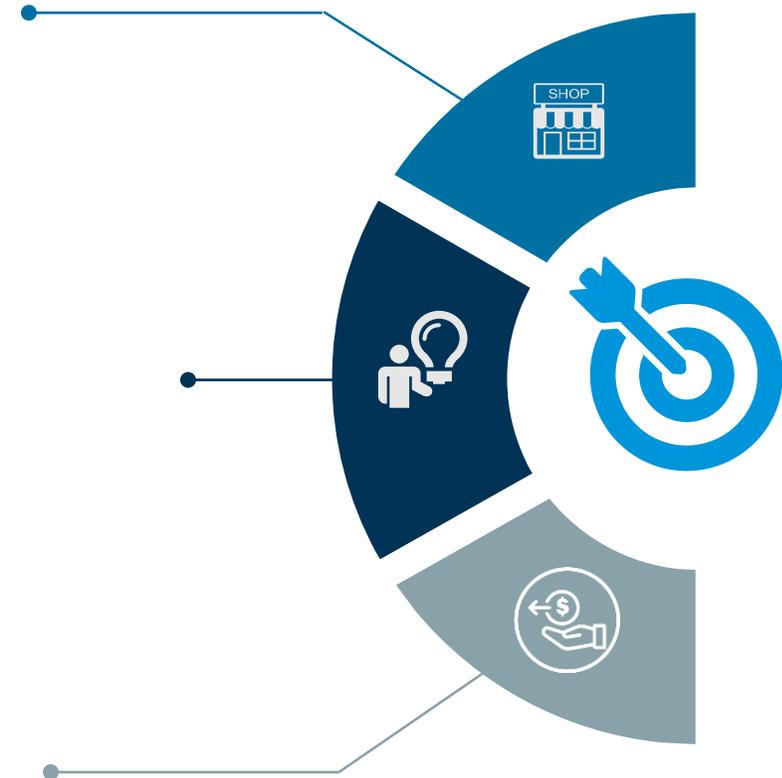
- Q1 saw cumulative GST collection of ₹ 4.53 lac cr, an increase of 12% QoQ
- While Jun'22 Manufacturing PMI saw the weakest pace of growth since last September, Services PMI hit the highest mark since Apr'11
- The Monster Employment Index (MEI)* saw hiring activity increase in BFSI (28%), ITeS (12%) and Telecom (12%) in Jun'22 on YoY basis
- Our Allsec payroll data shows a 12% increase in same-customer payslips processed in Jun this year on YoY basis

BFSI, Retail and IT were key business drivers

- General staffing added over 3k headcount in BFSI, Retail and Telecom segments
- Selection business continue to outperform the expectations on the back of increased permanent staffing mandates
- Opening of Singapore economy provided tailwinds to overseas IT staffing business

Increased SG&A on the back of higher salary costs

- Quess' overall core headcount increased by ~350, led by GTS and Monster. Most of the hiring has been to strengthened sales team
- Q1 FY'23 SG&A cost increased by 11% QoQ, chiefly due to higher salary cost



Q1FY23 Financial Updates

Revenue:

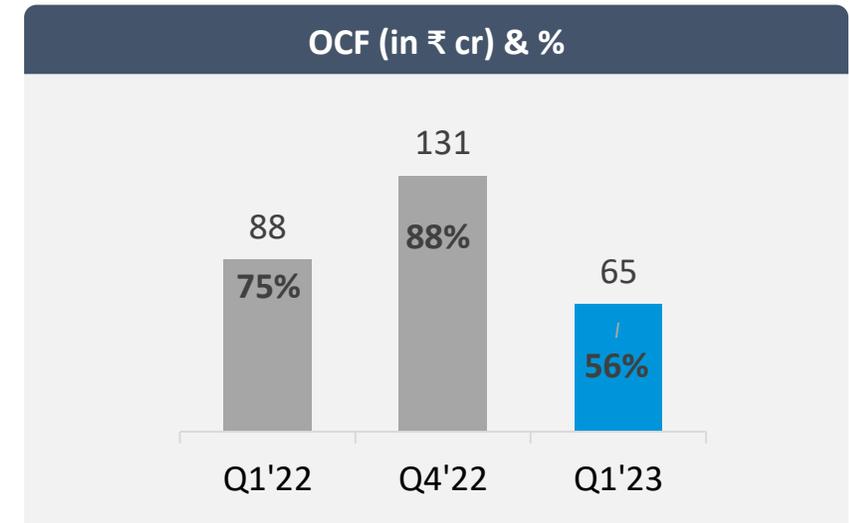
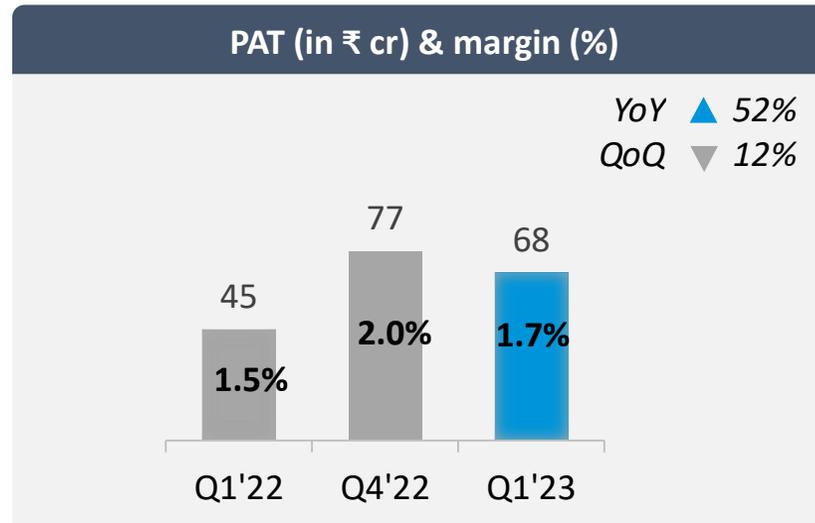
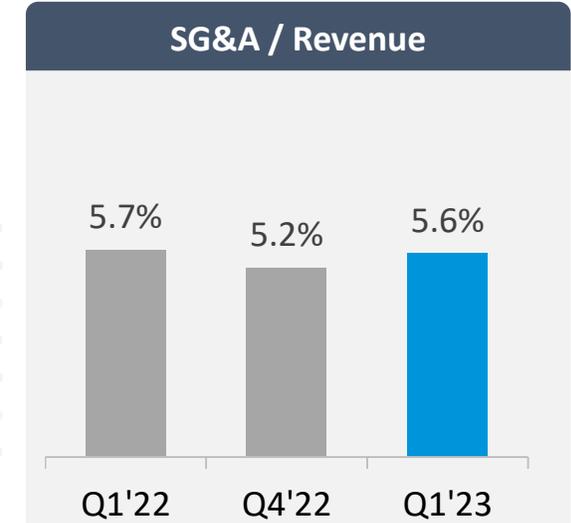
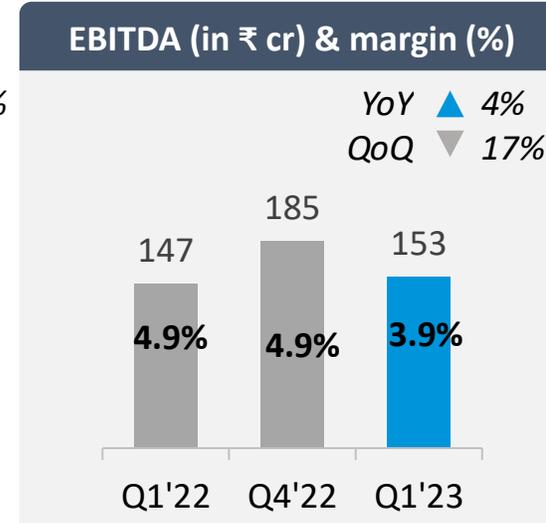
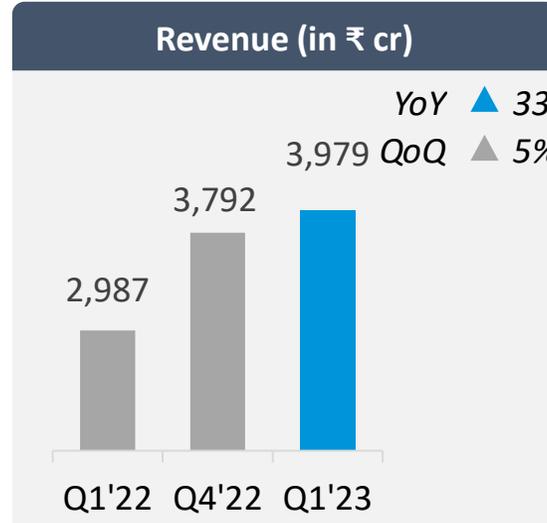
- **Up 33% YoY** driven by General Staffing (up 34%), QITS (up 33%), and ConneQt (up 33%)
- **Up 5% QoQ**, due to strong execution. General Staffing (up 6%) Singapore IT Staffing (up 16%), and Conneqt (up 6%)

Profitability:

- EBITDA from operations **up 4% YoY** to ₹ 153 cr, margin decline due to:
 1. Increase cash burn in Product Led Business
 2. Increase in SG&A / Revenue from 5.2% to 5.6% due to 1) Higher salary cost, 2) Increased spend on tech tools
 3. IFM EBITDA margin declined by ~220 bps YoY, due to contract re-negotiation with a major customer
- **PAT up 52% YoY**

Cash Generation:

- Q1'23 OCF/Operating EBITDA conversion at 56%
- DSO increased to 59 days from at 56 days in Q4'FY22



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Platform-wise Updates



Changes in Reporting Segments (1/2)

- **New Segment ‘Product Led Businesses’ has been created.** This segment will include erstwhile emerging businesses i.e. Monster.com, Blue collar Jobs and Qdigi. Previously these businesses were reported under Global Technology Solutions Segment
- The **Canadian Staffing business**, previously reported under Global Technology Solutions Segment, **is subsumed under Workforce Management from Q1 FY23**
- Changes in the reporting structure have been instituted in order to:
 - **Create clear demarcation between the mature businesses which are cash generating** and the businesses that require cash infusion
 - All of the overseas staffing businesses are now reported under Workforce Management platform

Changes in Reporting Segments (2/2)

Old Segments		
Workforce Management	Global Technology Solutions	Operating Asset Management
General Staffing	CLM Voice	Facilities
Professional Staffing India	Non voice BPO	Security
Overseas Staffing	HRO	Industrials
	Insurtech	Telecom
	Professional Staffing Canada	
	Monster.com	
	QDigi	

New Segments			
Workforce Management	Global Technology Solutions	Operating Asset Management	Product Led Business
General Staffing	CLM Voice	Facilities	Monster.com
Professional Staffing India	Non voice BPO	Security	QDigi
Overseas Staffing	HRO	Industrials	Blue Collar Jobs
Professional Staffing Canada	Insurtech	Telecom	

Moved to Workforce Management

Moved to Product Led Business

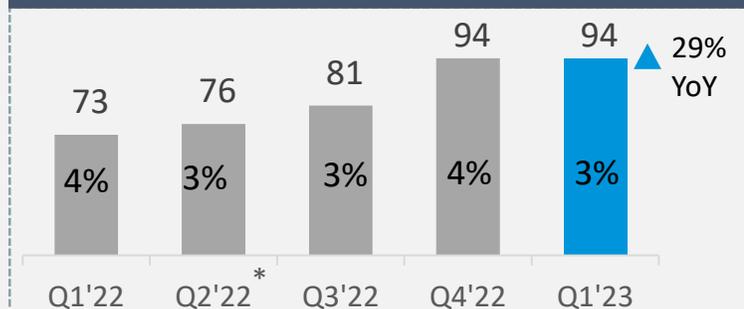
Workforce management – Performance Snapshot

Financial Metrics

Revenue (in ₹ cr)

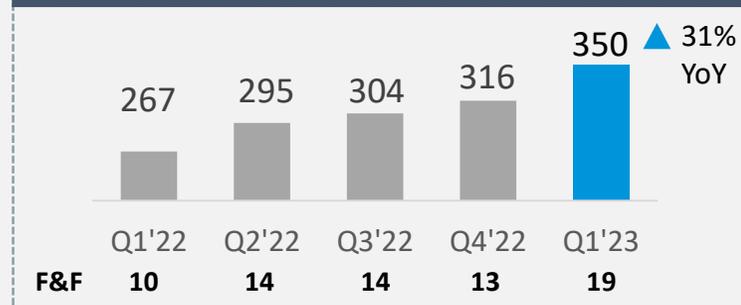


EBITDA from operations (Rs Cr)



Operating Metrics

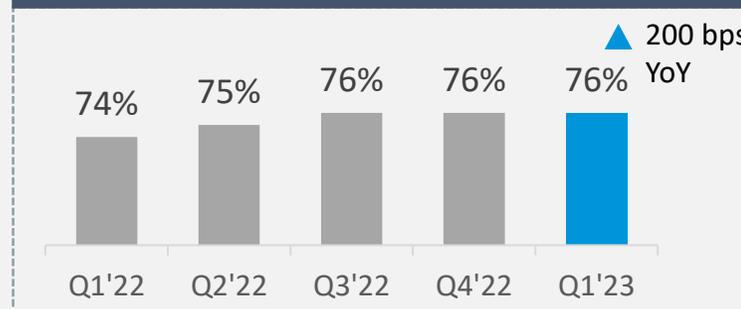
Associate Headcount# (in '000)



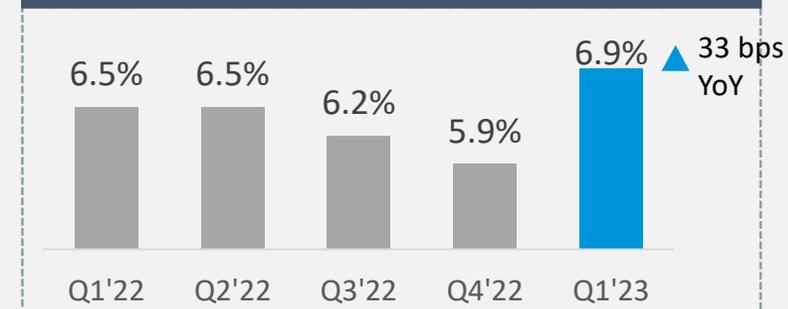
Core:Associate FTE^(Gen Staff- 1:X)



Collect & Pay - Headcount



SG&A / Revenue (IT Staff)



Key developments:-

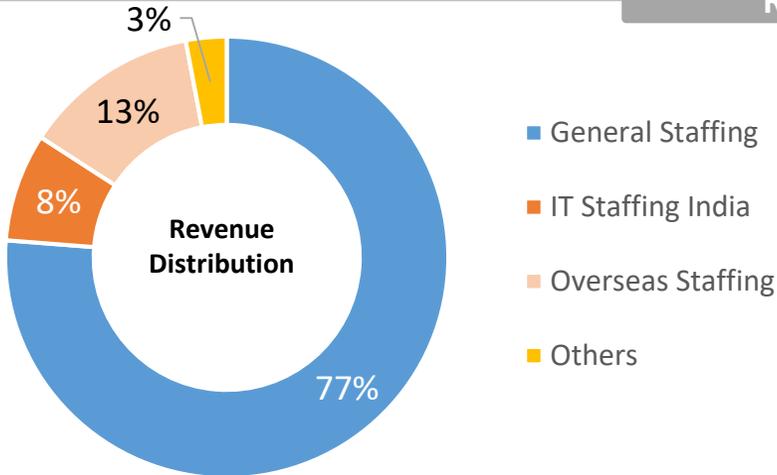
- **General Staffing** headcount crossed >300k. BFSI, Retail and Telecom were key drivers. Revenue up 34% YoY and 6% QoQ
- **IT Staffing** revenue up 33% YoY. Continued focus on high margin segments and strengthened delivery to drive profitability growth. HC with >10k GM now makes up 35% of total associate base vs. 32% a year earlier

*EBITDA from operations excludes extraordinary ECL of ₹ 33 cr (TSD)

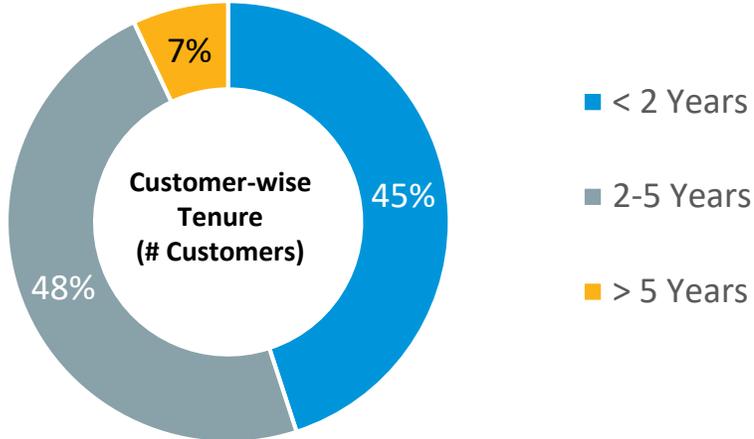
^ Core excludes Temps, Retainers and Interns

Workforce Management – Revenue Distribution and Customer Insights

Revenue Distribution

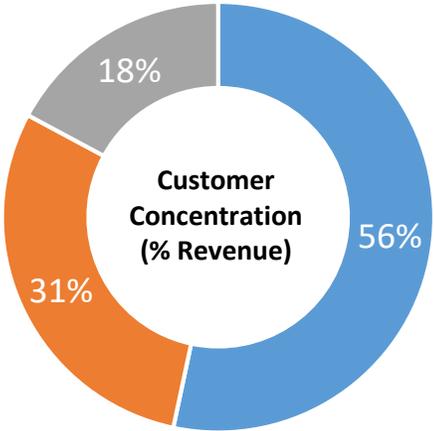


Staffing constitutes 97% of the revenue

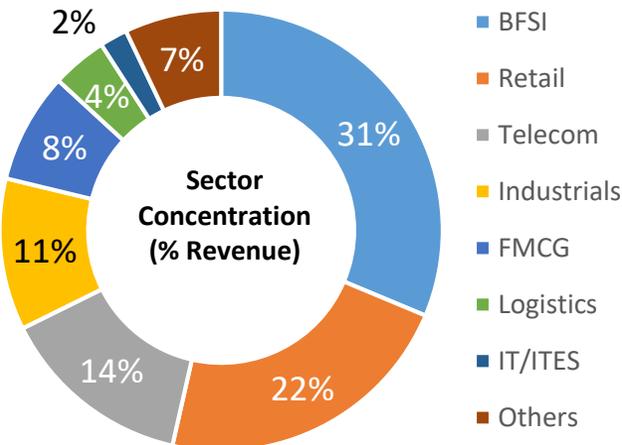


Good customer loyalty & healthy new customer addition:
Half of the Customers have tenure >2 years

Customer Insights (Gen. Staffing)

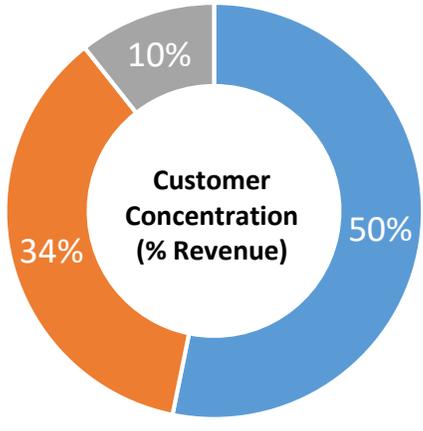


■ Top 10 ■ Next 40 ■ Others

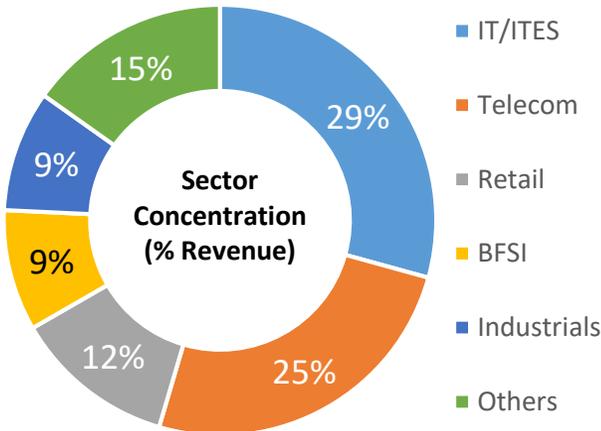


■ BFSI
■ Retail
■ Telecom
■ Industrials
■ FMCG
■ Logistics
■ IT/ITES
■ Others

Customer Insights (QITS)



■ Top 10 ■ Next 40 ■ Others



■ IT/ITES
■ Telecom
■ Retail
■ BFSI
■ Industrials
■ Others

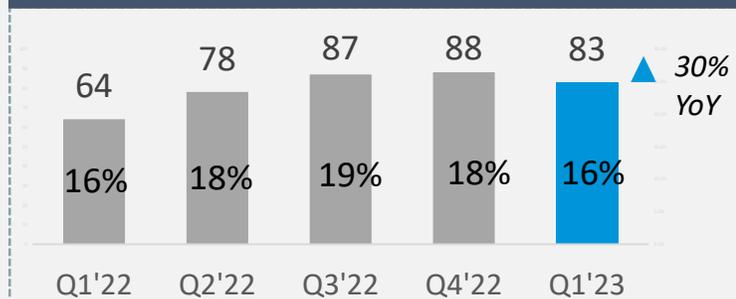
Global Technology Solutions – Performance Snapshot

Financial Metrics

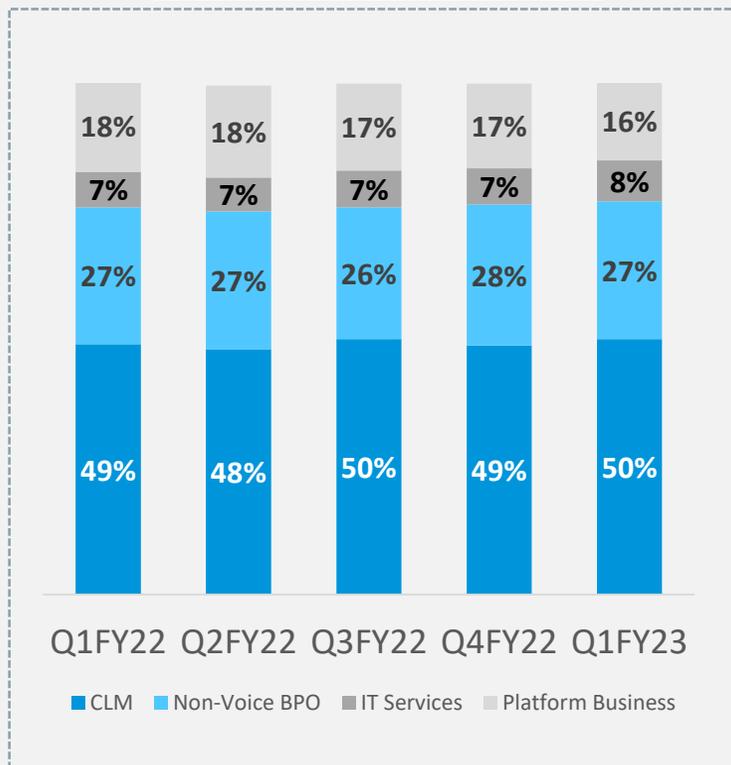
Revenue (Rs Cr)



EBITDA from operations (Rs Cr)



Revenue Distribution

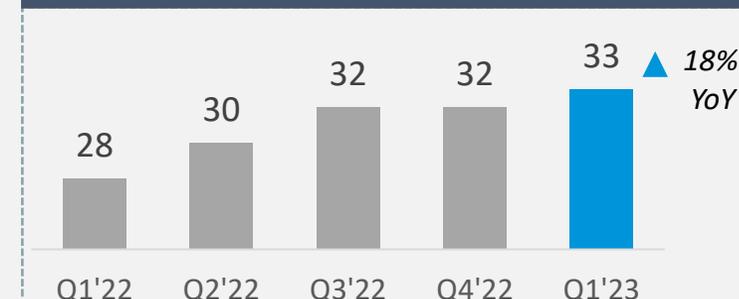


Operating Metrics

Revenue / Employee (Rs '000)



HRO Records Processed (Allsec: in lakhs)

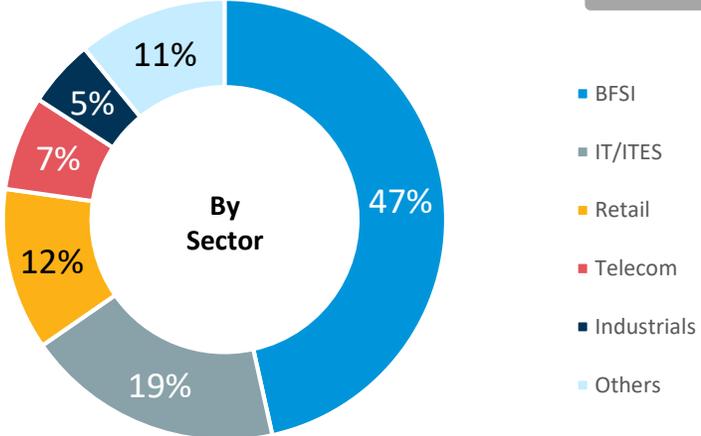


Key developments:

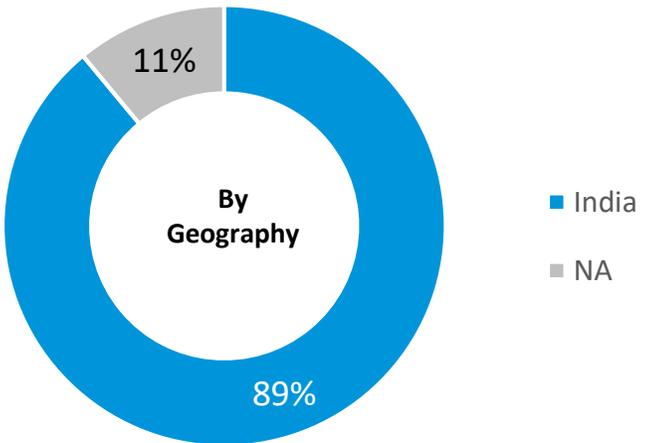
- **CLM:** Revenue up 33% YoY. Non-voice CLM grew by 10% YoY. New logo addition continue to be high with **31 logos added during the quarter**
- **Non-CLM BPO:** Collection business revenue up 35% YoY
- **Platform based services (InsurTech in US and HRO in India):** HRO platform payslips processed per quarter up 18% YoY on the back of 18 new logos won

Global Technology Solutions– Revenue Distribution and Customer Insights

Diversified Revenue Base

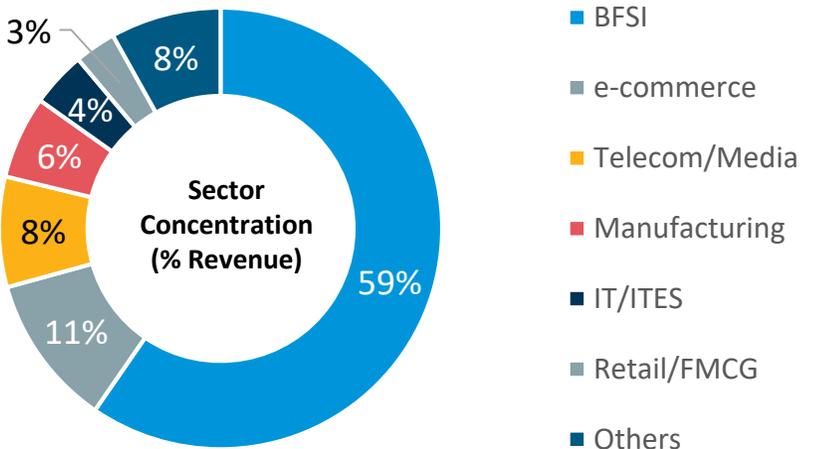
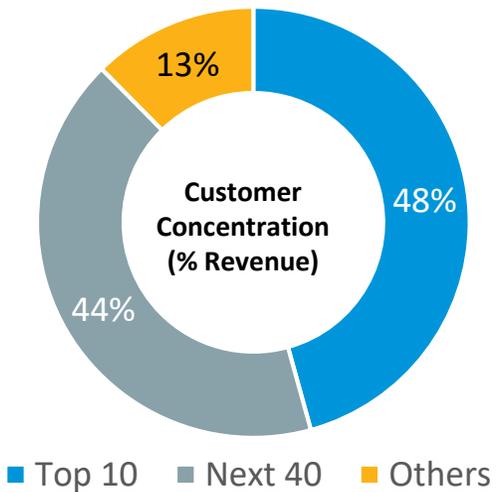


Revenue-base diversified across sectors



India is the main focus

Customer Insights (CLM and Non-voice BPO)



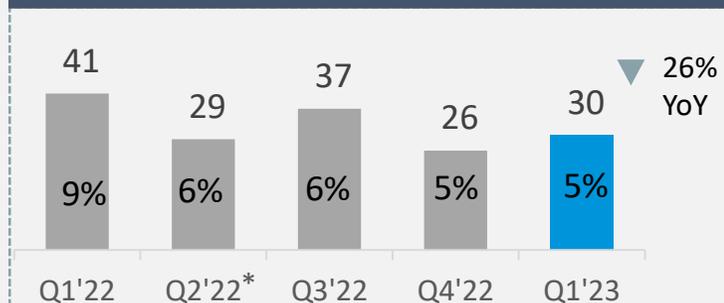
Operating Asset Management – Performance Snapshot

Financial Metrics

Revenue (Rs Cr)

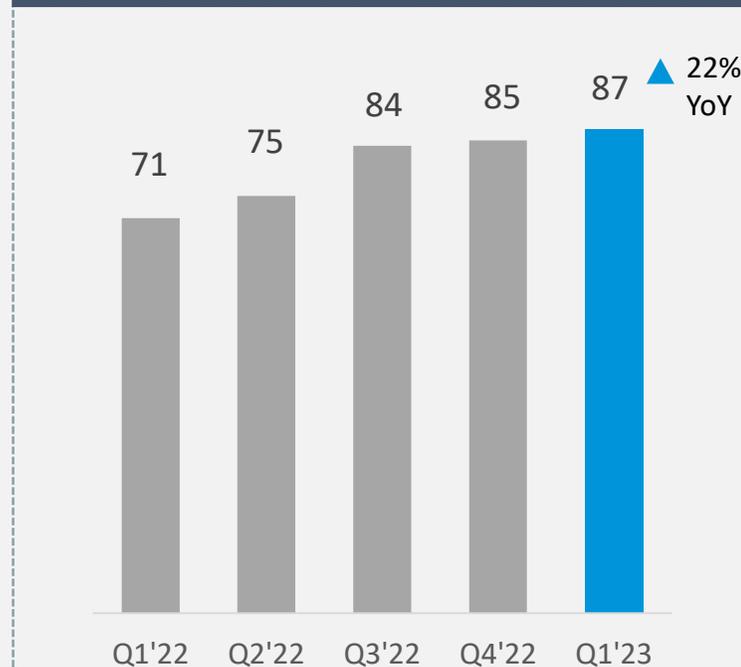


EBITDA from operations (in Rs Cr)



Operating Metrics

Associate Headcount# (in '000)



Revenue/Headcount/Month (Rs '000)



Core to Associate



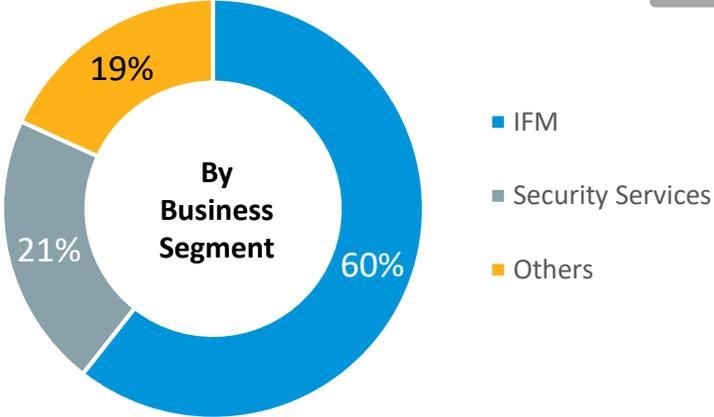
Key developments:

- **IFM:** Revenue up 25% YoY. EBITDA margin declined by ~220 bps YoY, due to contract re-negotiation with major customer. Added 23 new customers during the quarter.
- **Terrier Security:** Revenue up 29% on YoY basis on the back of strong HC addition (up 27% YoY), customer sales momentum remains strong with 15 new customers in the quarter

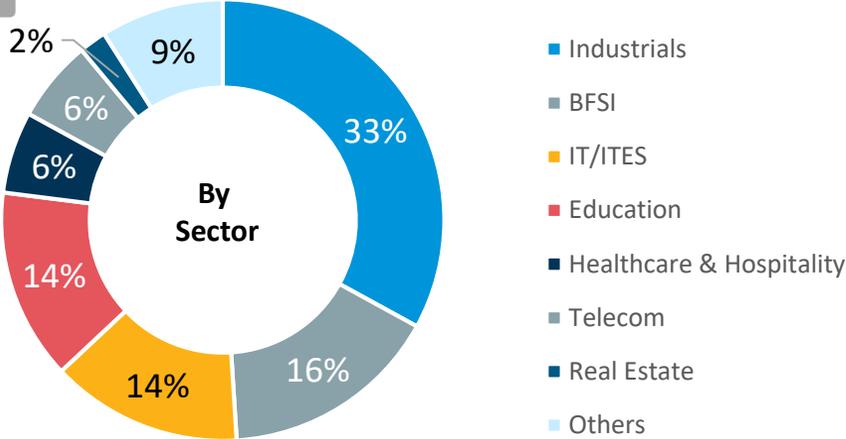
* EBITDA from operations excludes extraordinary ECL of ₹ 12 cr

Operating Asset Management – Revenue Distribution and Customer Insights

Revenue Distribution

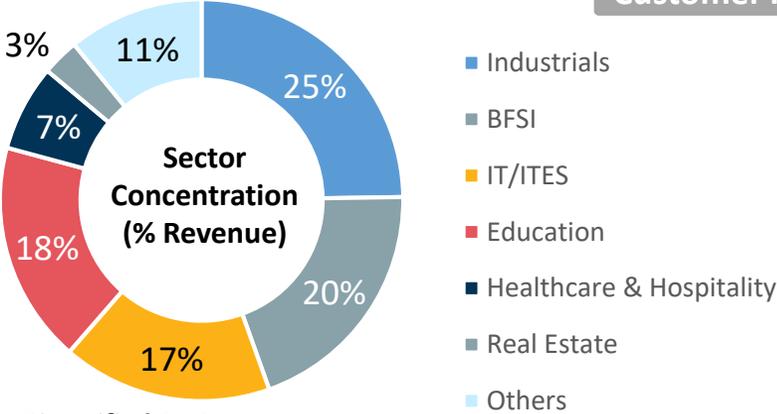


IFM* is the largest business segment

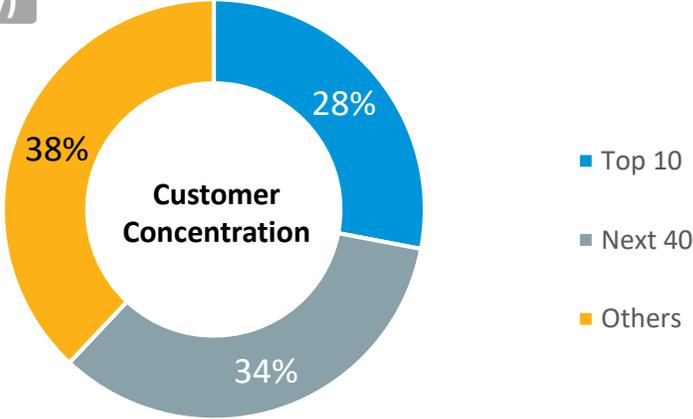


Revenue-base diversified across sectors

Customer Insights (IFM*+Security)



Diversified Customer Exposure:
Healthy distribution of contracts across customers

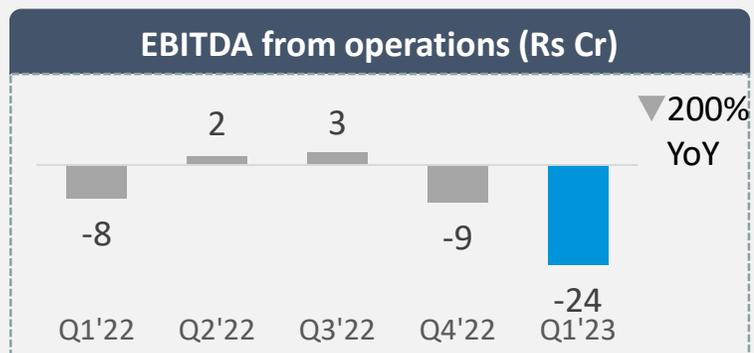
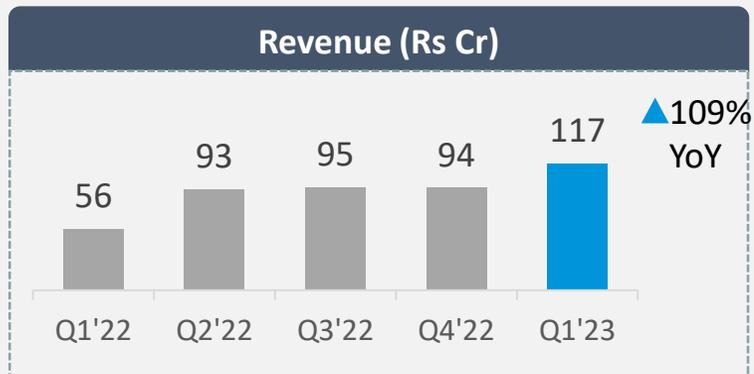


No Customer concentration risk
Top 10 customers account for 28% of revenue

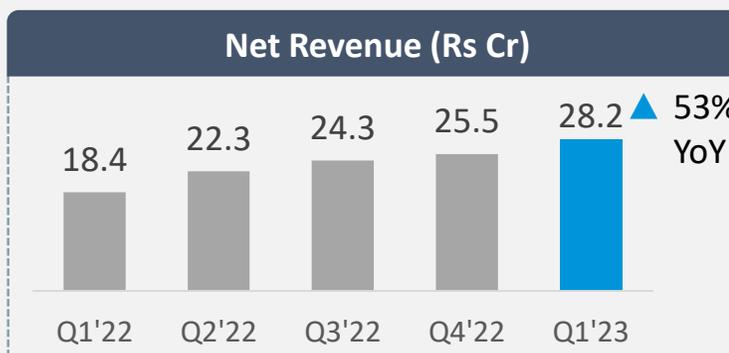
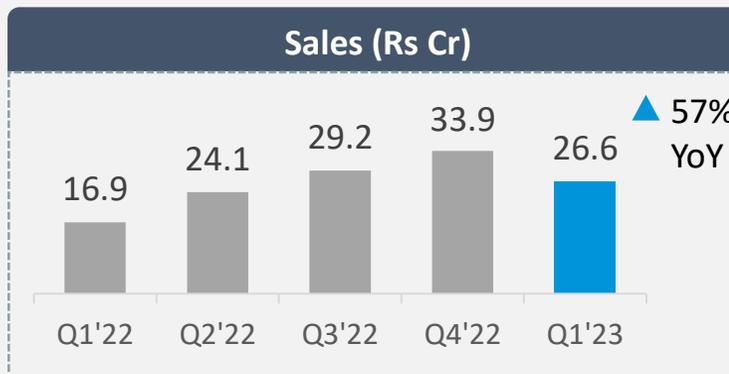
*Integrated Facility Management

Product Led Business – Performance snapshot

Product Led Business



Monster.com



Monster - Key developments:

- Launch of **new Recruiter Search V4.1**; **100%** customers onboarded.
- Beta launch of **Early Career Platform** as **connect** and **nurture** platform for the millennials.
- 6-month active user base grew **17% QoQ** to 17.1 M; User Acquisition & Re-activation crossed **2 million** in the quarter.
- **35M Traffic** representing **24% QoQ**.
- Highest ever **C-SAT at 95%** while NPS grew by **71% QoQ** to **24**.

Product Led Business – Blue Collar Jobs

Qjobs

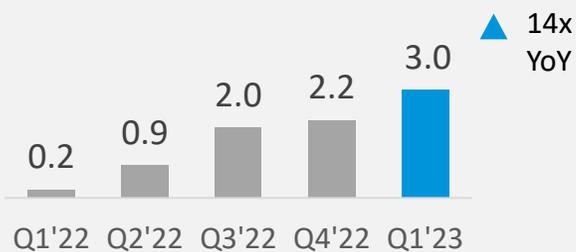
New Users Signed Up (in Mn)



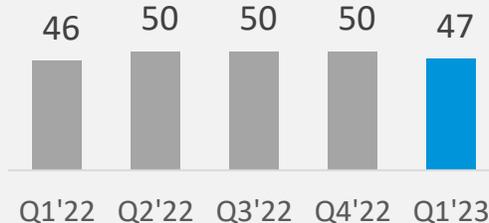
External Customers



New Job Openings (in Mn)



NPS



- **4.9 million+ candidates** and **3 million+ active job openings** in Q1'23
- **1.25 million+ monthly recruiter-candidate interactions** facilitated
- **580K+ candidates' upskilling** facilitated in Q1'23

Key Operational Metrics

- Won first direct external customer (1.2k Users)
- 255K + Monthly Active Users & 100K + DAU
- 30L Attendance Markings Monthly and 6.5L + shifts supervised thru digital supervisor reducing manual effort
- New features launched - Multi-location attendance , Attendance automated reports (15+ Companies), Retail Associate Dashboard



Key Operational Metrics

- Expanded user base to 420K with 150K + MAU
- >15K monthly leads
- >6,700+ monthly units sold across Loans, Salary Advance, and Savings categories
- INR 74+ Cr Annual GTV Run Rate (Employee benefits delivered)

“
Annexures

Income Statement

Particulars (in ₹ cr)	Q1 FY23	Q1 FY22	Q4 FY22	YoY	QoQ
Revenue from operations	3,979	2,987	3,792	33%	5%
Less:					
Employee benefit expense	(3,395)	(2,599)	(3,228)	31%	5%
Cost of material	(98)	(47)	(84)	106%	17%
Other expenses	(333)	(194)	(295)	72%	13%
Total expenses	(3,826)	(2,840)	(3,607)	35%	6%
EBITDA	153	147	185	4%	-17%
Other income	7	5	5	49%	54%
Interest	(20)	(17)	(19)	21%	4%
Depreciation and amortisation	(61)	(50)	(64)	23%	-5%
Operating EBT	79	85	106	-7%	-25%
NCI Put Option Liability	(0)	(5)	(0)	-97%	106%
Share of Profit from Associates (net of tax)	0	0	(1)	363%	-113%
Profit before tax and Exceptional items	79	80	105	-1%	-25%
Exceptional items	-	-	1	100%	100%
Profit before tax	79	80	104	-1%	-24%
Tax	(12)	(36)	(27)	-68%	-57%
Profit after tax	68	45	77	52%	-12%
EBITDA margin	3.85%	4.92%	4.87%	-106 bps	-102 bps
PAT margin	1.70%	1.49%	2.02%	21 bps	-32 bps
Basic EPS	4.52	3.13	4.98	44%	-9%
Diluted EPS	4.48	3.07	4.94	46%	-9%

Balance Sheet

Particulars (in ₹ cr)	30-Jun-22	31-Mar-22	Var %
Non-current assets			
Fixed assets	494	498	-1%
Intangibles	1,186	1,174	1%
Investments	3	10	-74%
Other non-current assets	606	568	7%
Current assets			
Trade receivables	1,399	1,270	10%
Unbilled revenue	1,186	1,062	12%
Cash and cash equivalents	522	604	-13%
Loans & other current assets	232	184	26%
Total assets	5,627	5,371	5%
Equity			
Share capital	148	148	0%
Other equity	2,317	2,290	1%
Non controlling interest	143	131	9%
Debt			
Long term debt	20	24	-16%
Short term debt	561	564	0%
Other liabilities			
Trade & other payables	122	115	6%
Other Financial Liabilities	1,541	1,321	17%
Other provisions & tax liabilities	774	778	0%
Total equities and liabilities	5,627	5,371	5%

Segment Reporting

Particulars (in ₹ cr)	Quarter Ended				
	Jun-22	Mar-22	Dec-21	Sep-21	Jun-21
Workforce Management Platform					
Revenue	2,758	2,644	2,545	2,214	2,073
Reported EBITDA	94	94	81	43	73
<i>Reported EBITDA %</i>	<i>3.41%</i>	<i>3.56%</i>	<i>3.18%</i>	<i>1.94%</i>	<i>3.52%</i>
EBITDA from operations				76	
<i>EBITDA from operations %</i>				<i>3.43%</i>	
Global Technology Services Platform					
Revenue	507	477	468	431	393
Reported EBITDA	83	88	87	78	64
<i>Reported EBITDA %</i>	<i>16.37%</i>	<i>18.45%</i>	<i>18.59%</i>	<i>18.10%</i>	<i>16.28%</i>
Operating Asset Management Platform					
Revenue	597	577	578	490	465
Reported EBITDA	30	26	37	17	41
<i>Reported EBITDA %</i>	<i>5.03%</i>	<i>4.43%</i>	<i>6.37%</i>	<i>3.44%</i>	<i>8.76%</i>
EBITDA from operations				29	
<i>EBITDA from operations %</i>				<i>5.83%</i>	
Product Led Business					
Revenue	117	94	95	93	56
Reported EBITDA	(24)	(9)	3	2	(8)
<i>Reported EBITDA %</i>	<i>-20.51%</i>	<i>-9.57%</i>	<i>3.16%</i>	<i>2.15%</i>	<i>-14.29%</i>

Segment Reporting: Old Segments

Particulars (in ₹ cr)	Quarter Ended				
	Jun-22	Mar-22	Dec-21	Sep-21	Jun-21
Workforce Management Platform					
Revenue	2,683	2,570	2,472	2,143	2,005
Reported EBITDA	90	89	76	39	70
<i>Reported EBITDA %</i>	3.35%	3.47%	3.09%	1.84%	3.47%
EBITDA from operations				72	
<i>EBITDA from operations %</i>				3.34%	
Global Technology Services Platform*					
Revenue	700	645	636	595	517
Reported EBITDA	62	84	94	85	59
<i>Reported EBITDA %</i>	8.86%	12.98%	14.86%	14.22%	11.50%
Operating Asset Management Platform					
Revenue	597	577	578	490	465
Reported EBITDA	30	26	37	17	41
<i>Reported EBITDA %</i>	5.03%	4.43%	6.37%	3.44%	8.76%
EBITDA from operations				29	
<i>EBITDA from operations %</i>				5.83%	

* Includes Product Led Business

India's largest business services platform, driving productivity for customers

Front End Processes



Marketing Services*



In-store & Field Sales*



Omni channel CLM & Backoffice Services



Collections*



Installation & After Sales Services*



Industrial Operations & Maintenance



Staffing & Payroll



Compliance Tech & Services



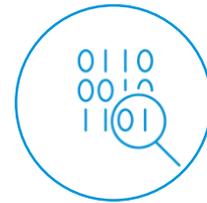
Facilities Maintenance



Manned & Electronics Security



F&A & HR Operations



Infrastructure & Digital IT Services

*Including gig-based workforce

1

Digital Hire-to-Retire

Sourcing



- **Digital sourcing** via auto-hiring engines, with digital pre-screening and assessment via [Qjobs](#) and [Monster](#)

Recruiting



- **End-to-end ATS ReQuit platform** from mandate creation, to candidate tagging and offer generation

Onboarding



- **Paperless on-boarding** of candidates within 14 minutes via [POP](#) (Paperless On-boarding Platform)

Payrolling



- **Flow-through payroll processing** and pay-slip generation on proprietary cloud-based **QPay** and **SmartPay** platforms

Compliance

- **AI-driven RegTech engine, [Simpliance](#)**, to ensure compliance with Laws

2

Technology-led Frontline Productivity

Digital workflow management

- [WorQ WorkTech](#) platform to remotely assign & monitor tasks, driving frontline productivity

Digitally delivered skilling

- [WorQ](#) digital skilling modules to **efficiently train & continuously update** employees

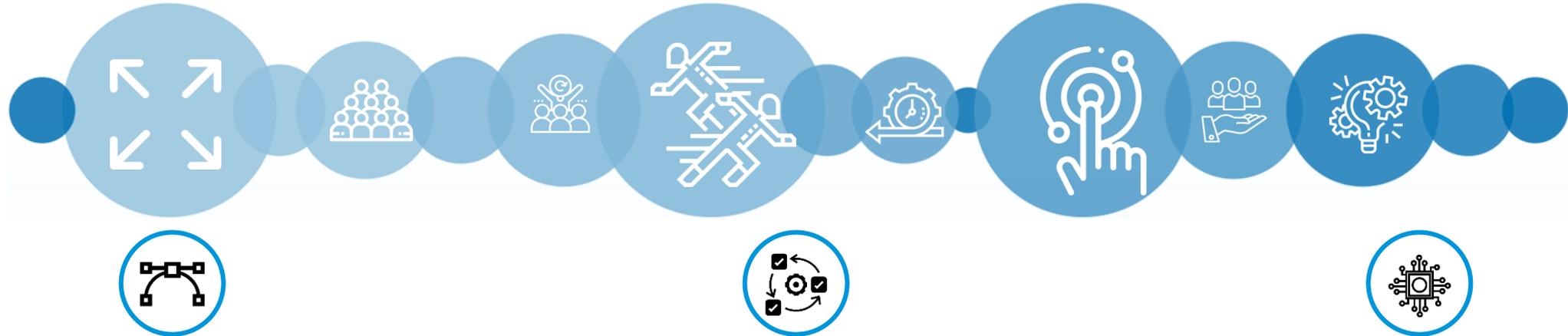
Processes and tooling

- **Superior tooling and SOPs** to drive productivity and improve dignity of labour

Ensuring flexibility and higher productivity

- [Taskmo](#), an on-demand task fulfilment platform to **manage seasonal demand through a distributed network of gig-workers** that ensures higher flexibility to customers at lower costs

Our customer proposition is unrivalled



Scale

- **~470,000*** associates and employees deployed over **600+** cities
- International operations in **South East Asia, North America & the Middle East**
- **3,000+ clients, 66 offices** in **34 Indian cities**

Agility

- **An entrepreneurial** 14 year old startup
- **Widest repertoire of services**, including up-skilling platform
- We deliver tailor made solutions per **customer needs**, consistently
- Unrivalled capabilities to **Source, Screen and Select talent** (75mn+ database, tech-led hiring via MonsterIndia.com and QJobs)

Technology

- Significant **frontline productivity capabilities** (e.g., WorQ, Qjobs, Taskmo)
 - Digitised **hire-to-retain platform**
 - Leading **front-line productivity tools**

Winning Together
In your win lies our win





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About Qess Corp

Qess Corp Limited (Qess) is India's leading business services provider, leveraging our extensive domain knowledge and future-ready digital platforms to drive client productivity through outsourced solutions.

We provide a host of technology enabled staffing and managed outsourcing services across processes such as sales & marketing, customer care, after sales service, back office operations, manufacturing operations, facilities and security management, HR & F&A operations, IT & mobility services, etc.

Our passion for delivering exceptional services, augmented by proprietary digital platforms, has strongly established our credentials as India's largest employer in the private sector and the biggest integrated business services provider in the country. We are proud to achieve this success as a 13- year old start-up.

A core value driving our business is constantly making the workforce more productive. Our business strategy is aligned to this, including training and skill development for better employability, helping job seekers easily find employment opportunities, digitising workflows, and providing social security benefits to a wider employable population.

Established in 2007 and headquartered in Bengaluru, Qess today has unmatched geographic presence and scale with more than 644 locations across India, South East Asia & North America, backed by technology-intensity and domain specialization to create unmatched service experiences.

Learn more about us at

www.qesscorp.com



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