

November 09, 2022

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

To,  
**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 second quarter and half year ended September 30, 2022.

The above said presentation is also made available on the Company's website <https://www.quesscorp.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

**Quess Corp Limited**

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[www.quesscorp.com](http://www.quesscorp.com)

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**SIA**  
STAFFING INDUSTRY ANALYSTS

2021  
Largest Global  
Staffing Firms

**QUESS**  
WINNING TOGETHER



# Investor Presentation

Q2'FY23

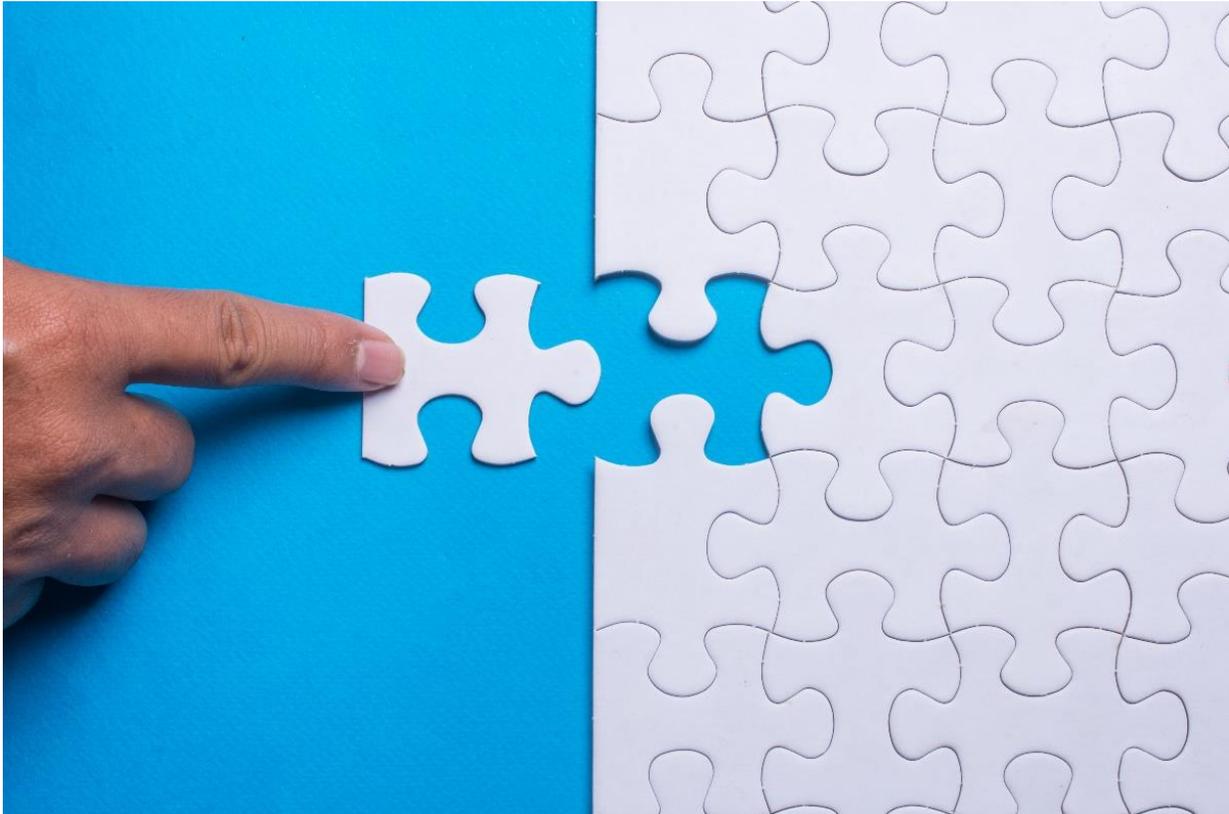
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Headcount reaches **500,000 milestone**

Corporate structure simplification with  
**divestment of Simpliance**

# Q2 FY23 – Highlights

	Q2 FY23	YoY Change
<b>Headcount</b>	504k	↑ 26%
<b>Revenue</b>	₹ 4,273 cr.	↑ 32%
<b>EBITDA</b>	₹ 135 cr.	↑ 20%
<b>% EBITDA</b>	3.16%	↓ 32 bps
<b>PAT</b>	₹ 40 cr.	↓ 4%

	Q2 FY23	YoY Change
<b>OCF</b>	₹ 68 cr. 72% of Op. EBITDA	↓ 46%
<b>Net Debt / (cash)</b>	₹ (57) cr.	↓ ₹ 126 cr.
<b>RoE</b>	6%	↓ 91bps
<b>Book value per share</b>	₹ 171	↑ 8.5%
<b>EPS (dil.)</b>	₹ 2.8	↑ 13%

Note: All numbers are on reported basis

# Q2FY23 – Financial Highlights – YoY

**Revenue** → ₹ 4,273cr ↑ 32%

**EBITDA** → ₹ 135cr ↑ 20%

**EBITDA %** → 3.2 %

**PAT** → ₹ 40cr ↓ 4%

**OCF** → ₹ 68cr 72% of Op EBITDA

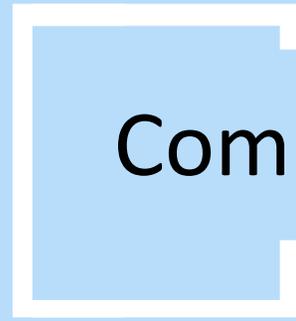
	Revenue   % Growth	EBITDA   % Growth
WFM	2,943 ₹ cr 33%	79 ₹ cr 82%
GTS	529 ₹ cr 23%	85 ₹ cr 9%
OAM	651 ₹ cr 33%	28 ₹ cr 65%
PLB	150 ₹ cr 62%	-24 ₹ cr -

# Q2 FY23 Business Highlights

- ▶ **Headcount:** Total Associate headcount crossed 500k
- ▶ **OCF to Operating EBITDA:** 72% conversion
- ▶ **Monster:** New user acquisition at highest ever with 1.8 million new registrations
- ▶ **Capital Allocation:** Announced the interim dividend of ₹ 8 per share for the Financial Year 2022-23
- ▶ **Portfolio Rebalancing:** Completed the divestment of Simpliance. The transaction closed at 21<sup>st</sup> Oct'22, valuing Simpliance at the Enterprise Value<sup>1</sup> of ₹ 120cr against our original investment of ₹ 4.5cr for 53% of the company

<sup>1</sup> On a cash free debt free basis

“



# 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**

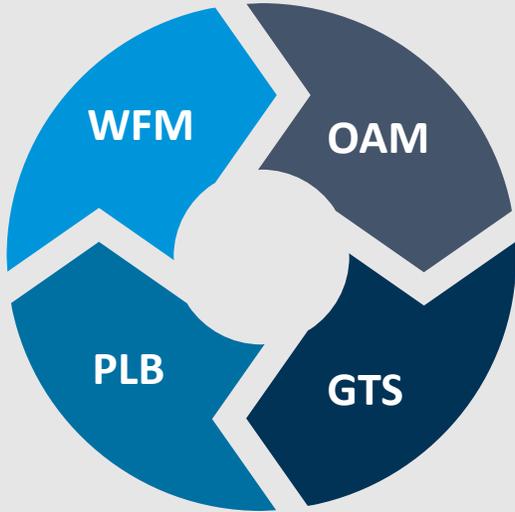
**384,000**

**504,000**

Services

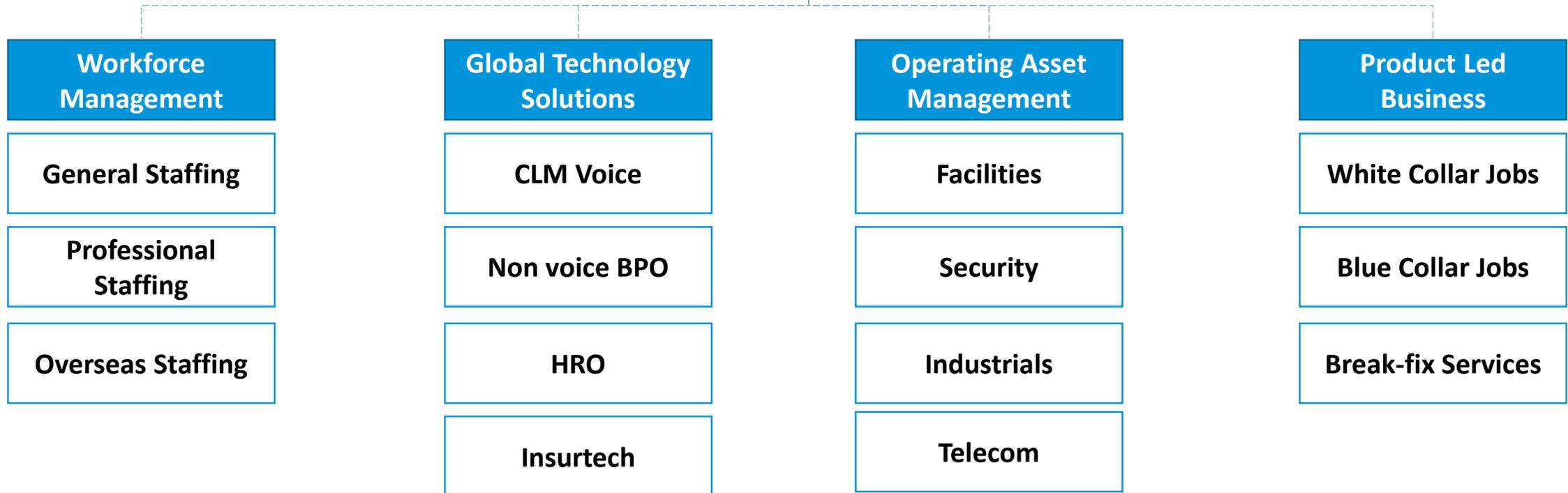
- Staffing
- Skilling
- Recruitment
- Facility Management

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



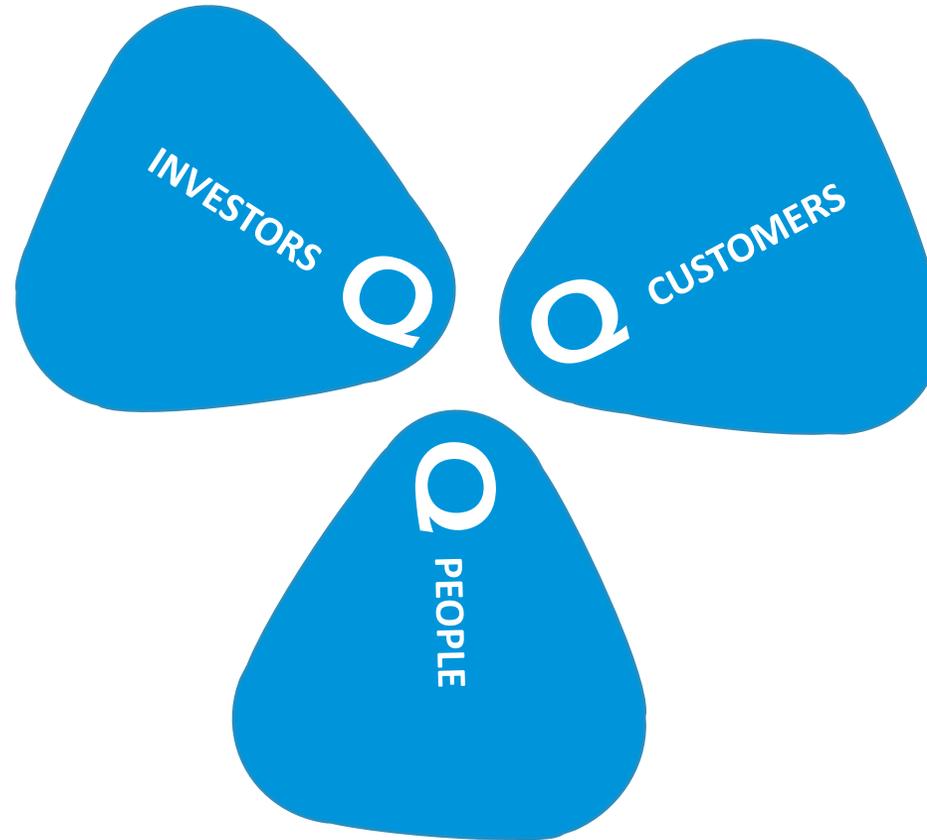
Our operations are spread across synergistic platforms

**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

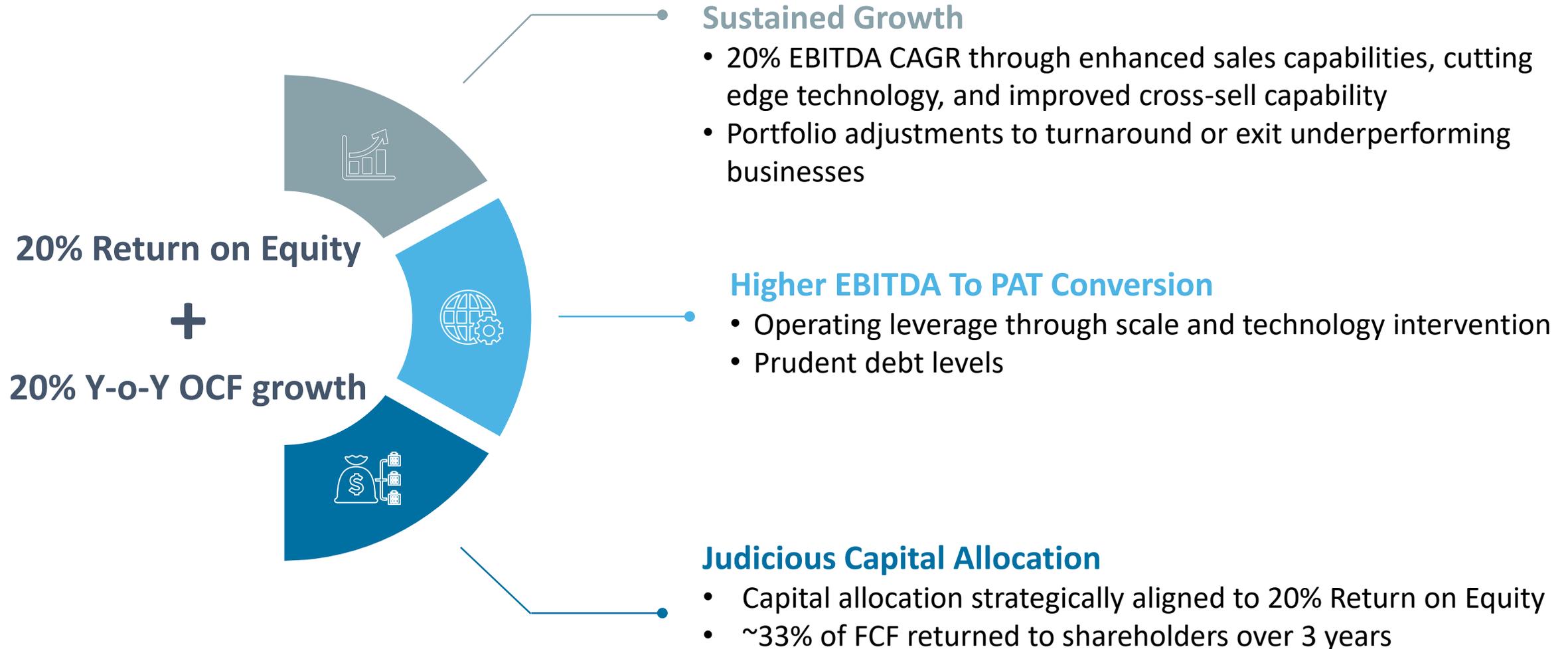


- Achieving and sustaining **25% RoE**
- Continue **Delivering 20% CAGR on OCF**
- Aspirational EBITDA of **6% by 2025**

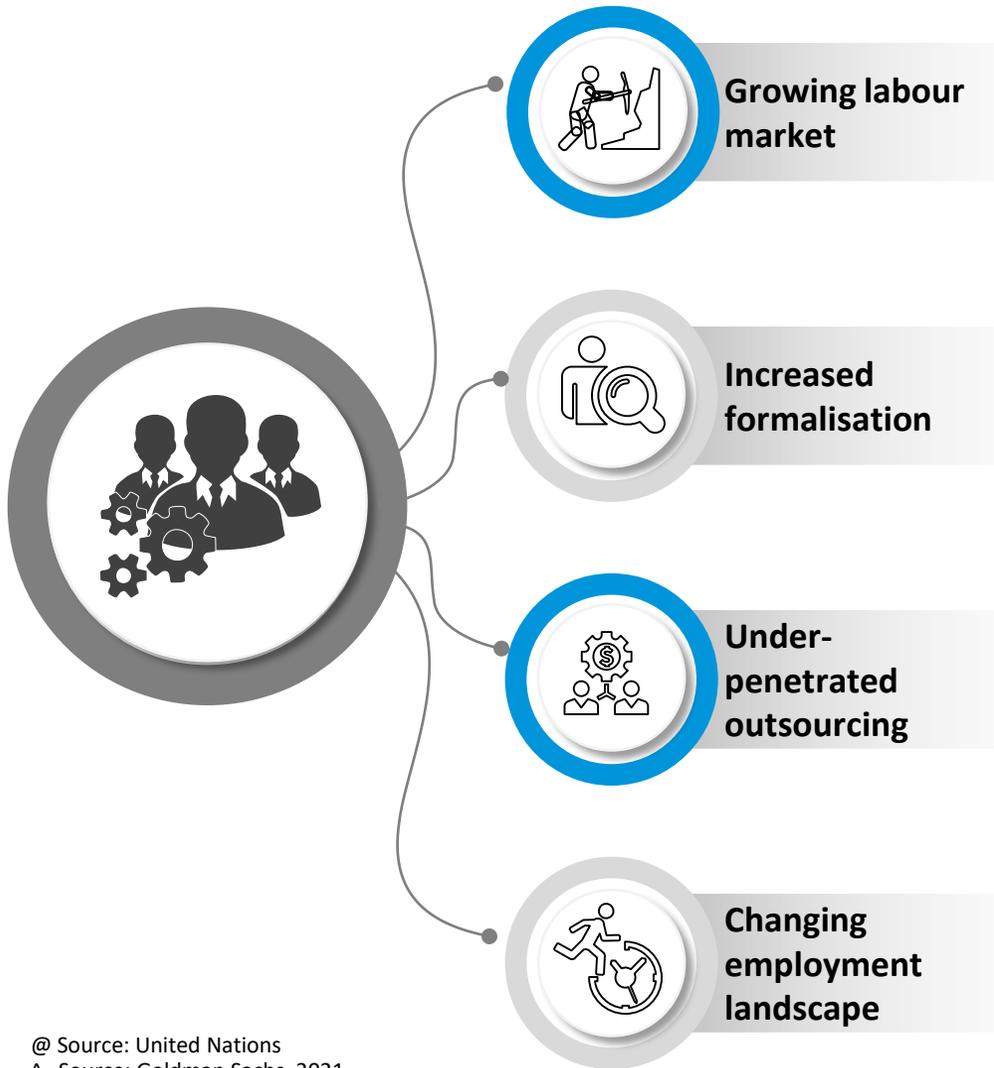
- **Build Scale - single operating platforms** for all organic business, brings in agility and speed in the way we work
- **Measure digital revenues separately**
- **Annual CSAT** across all business

- 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



- India to remain fastest growing major economy in 2022<sup>@</sup>
  - ~ 563<sup>§</sup> million Indian labour force growing at 5% CAGR (2017-20)
  - One of the world's largest labour forces, experiencing a tectonic shift in composition and focus
- Formalisation<sup>^</sup> to increase from 20.8% currently to 30.3% by 2025
  - ~58<sup>\*</sup> million new PF subscribers and ~72 million new ESIC subscribers in India since FY18
  - GST registered firms increased from 7.5mn in 2017 to ~14mn currently
- Indian companies increasingly exploring outsourcing to drive productivity and flexibility
  - 0.7%<sup>~</sup> penetration of flexi staffing in India as compared to ~3% in most developed markets<sup>\*\*</sup>
- Proposed new labour codes to accelerate formalization, compliance and outsourcing
  - Huge potential to improve labour productivity through increased usage of technology, as minimum wages rise
  - Gig economy to create ~90<sup>#</sup> million jobs and contribute incremental 1.25%<sup>#</sup> to country's GDP over the long term

@ Source: United Nations

^ Source: Goldman Sachs, 2021

\* Source: NSO - Payroll Reporting in India

~ Source: Indian Staffing Federation, 2019

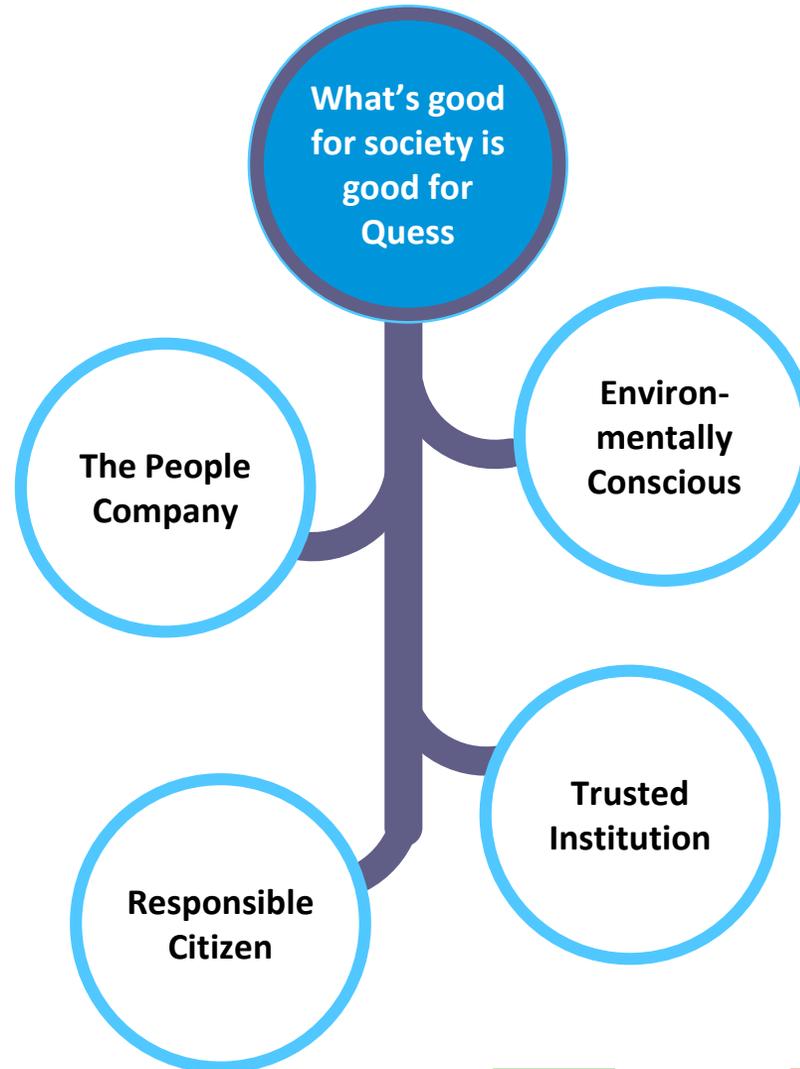
\*\* Source: World Employment Confederation

# 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 2022
- Amongst India's Top 100 Best Companies to Work For - **Ranked 98 by GPTW**
- **Infrastructure renovation for 75 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
- **Responsible waste management**, including ~10,700 kgs of e-waste and ~10,300 kgs of paper waste shredded and recycled in FY22
- Committed to setting a near-term science-based emissions reductions targets with the **Science Based Targets initiative (SBTi) by FY25**
- **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 Q2 operating environment

## Indian services activity grows at the slowest pace since March

- The Sep'22 Services PMI saw the Indian services sector end Q2FY23 on a weaker footing. The Services PMI stood at 54.3, falling from 57.2 in August. New business inflows and output rose at the slowest pace since Mar'22, which in turn dampened job creation
- The Monster Employment Index (MEI)\* saw weak hiring across IT – Hardware / Software (-11%) and BPO / ITES (-7%). BFSI (+20%) and Telecom (+13%) witnessed strong growth in hiring

## BFSI, Retail and Break-fix services were key business drivers

- General staffing added over 5k headcount in BFSI and Retail segments
- Break-fix services observed high growth driven by festival season

## IT Staffing and permanent recruitment slowed down

- IT staffing saw an associate HC drop of 4% YoY
- Selection business saw the 30% decline in revenue on QoQ basis



# Q2FY23 Financial Updates

## Revenue:

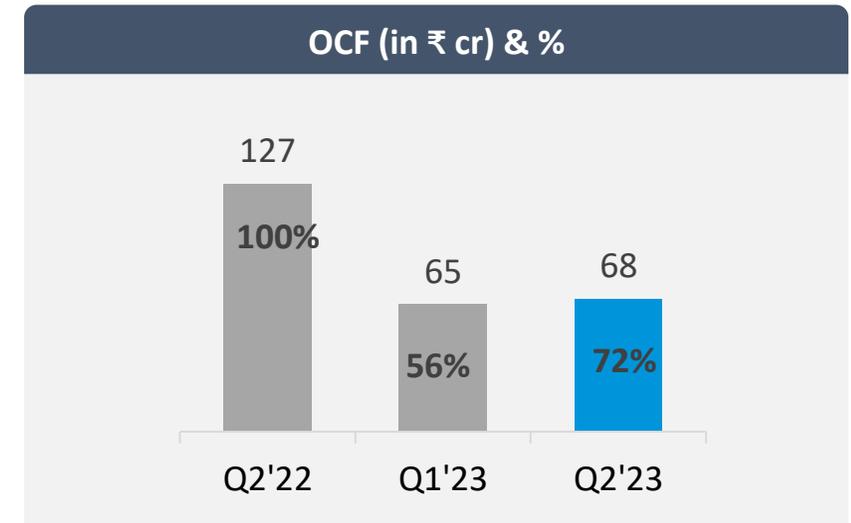
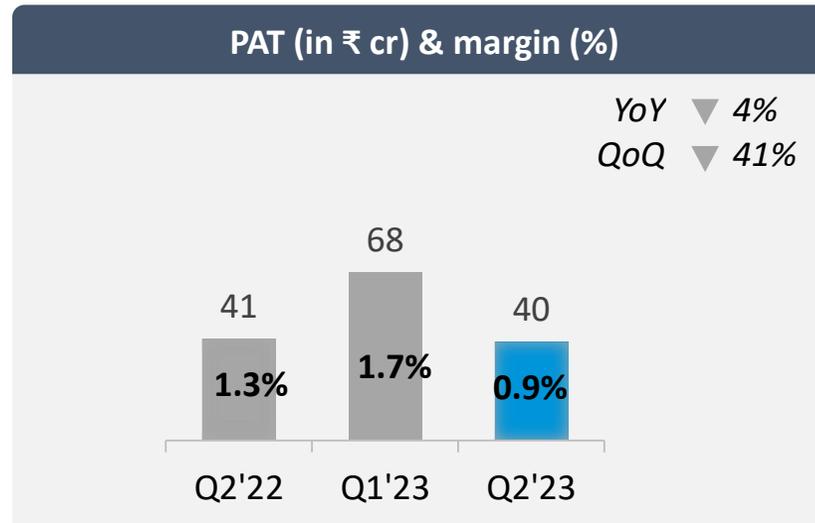
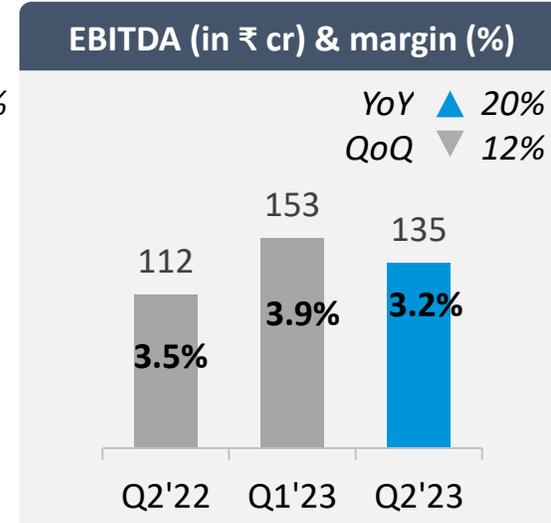
- **Up 32% YoY** driven by General Staffing (up 36%), Comtel (up 48%) and ConneQt (up 24%)
- **Up 7% QoQ**, due to steady execution by General Staffing (up 8%) Comtel (up 11%) and Qdigi (up 41%)

## Profitability:

- EBITDA from operations **up 20% YoY** to ₹ 135 cr, lower than revenue growth due to slowdown in IT-Staffing and Selection Business
- SG&A / Revenue increased YoY from 5.5% to 6.2% due to 1) Higher salary cost, 2) Increased spend on Travel and other corporate expenses
- **PAT down 4% YoY**

## Cash Generation:

- Q2'23 OCF/Operating EBITDA conversion at 72%
- DSO reduced by 1 day QoQ to 58 days
- Company achieved net cash position ₹ 57cr in Q2'23 against net debt position of ₹ 59cr in Q1'23



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Platform-wise Updates



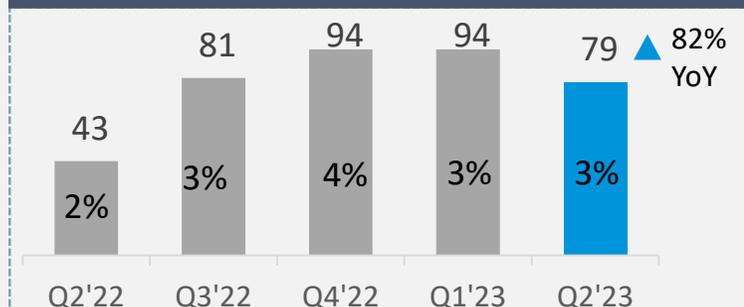
# Workforce management – Performance Snapshot

## Financial Metrics

### Revenue (in ₹ cr)



### EBITDA from operations (Rs Cr)



## Operating Metrics

### Associate Headcount# (in '000)

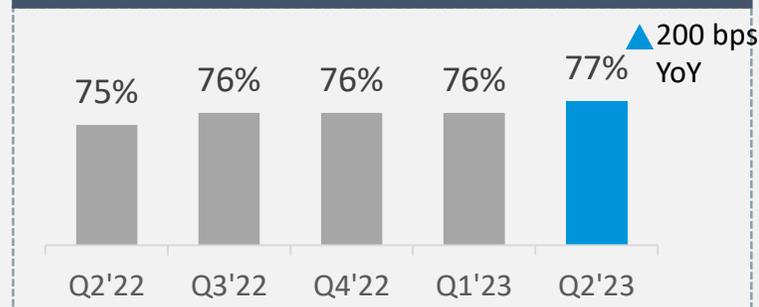


F&F 14 14 13 19 20

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



### Collect & Pay - Headcount



### SG&A / Revenue (IT Staff)

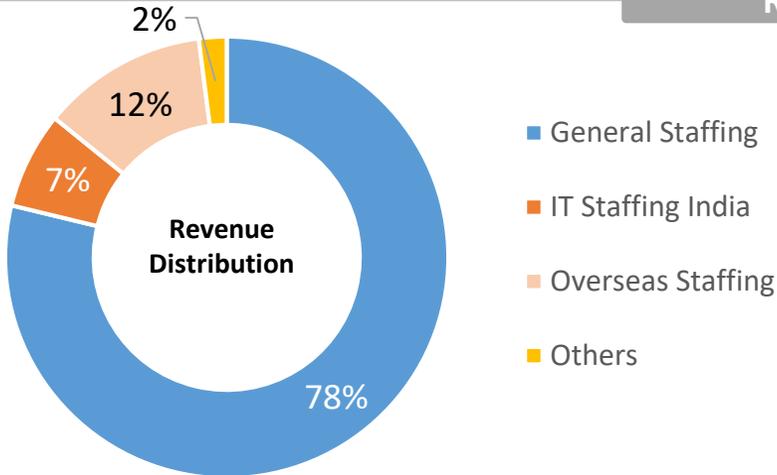


## Key developments:-

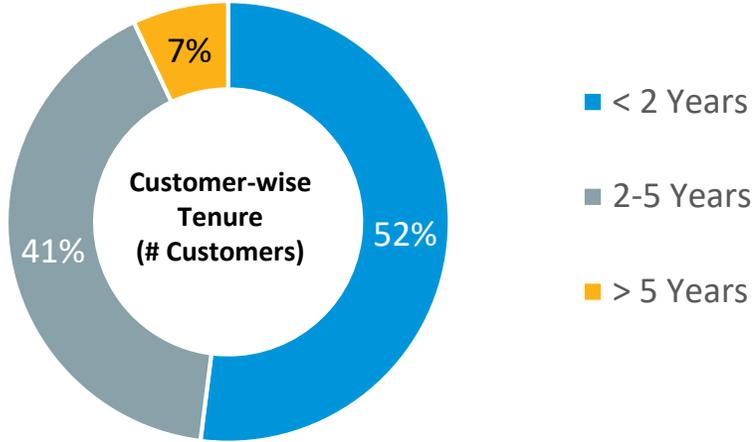
- **General Staffing** headcount crossed >330k. BFSI and Retail were key drivers. Revenue up 36% YoY and 8% QoQ
- **IT Staffing and Selection** revenue flat QoQ. Slowdown in IT hiring has contributed to EBITDA drop of 55% QoQ
- EBITDA margin dropped by **72bps QoQ** due to investment in **USA staffing** in addition to slowdown in IT hiring

# Workforce Management – Revenue Distribution and Customer Insights

## Revenue Distribution

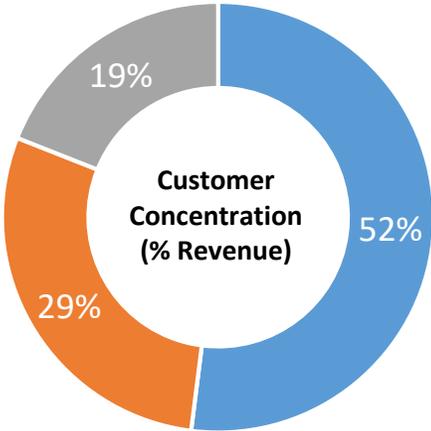


Staffing constitutes 97% of the revenue

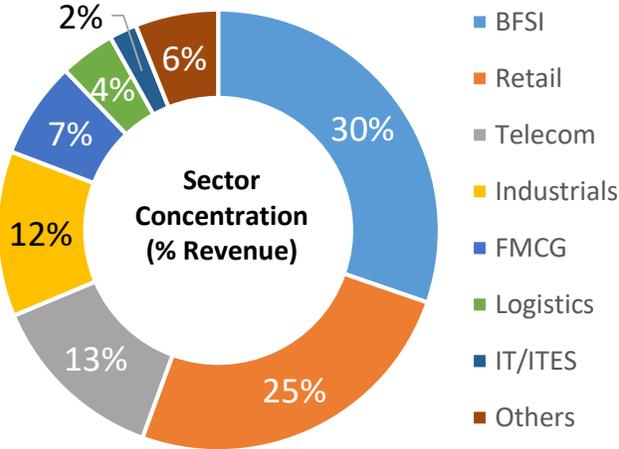


Good customer loyalty & healthy new customer addition

## Customer Insights (Gen. Staffing)

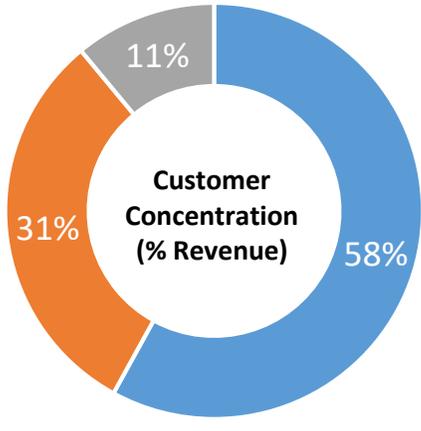


■ Top 10 ■ Next 40 ■ Others

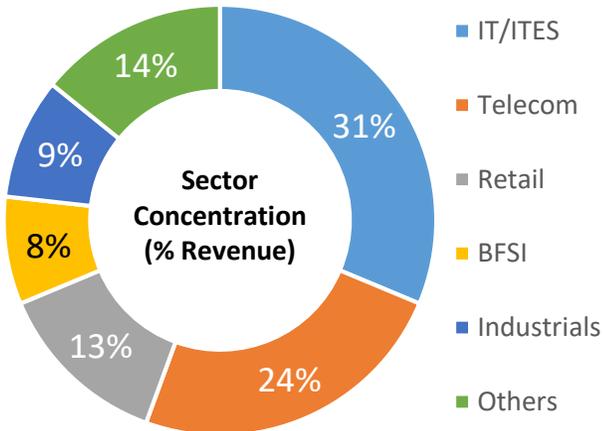


- BFSI
- Retail
- Telecom
- Industrials
- FMCG
- Logistics
- IT/ITES
- Others

## Customer Insights (QITS)



■ Top 10 ■ Next 40 ■ Others



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

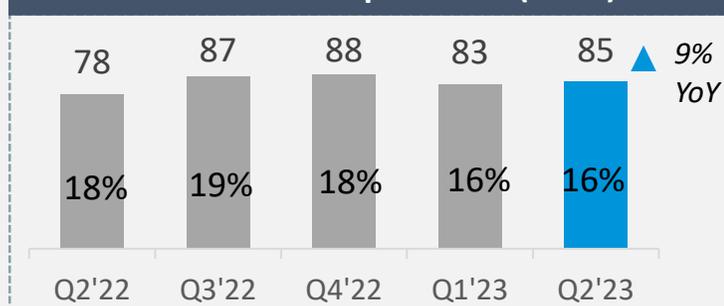
# Global Technology Solutions – Performance Snapshot

## Financial Metrics

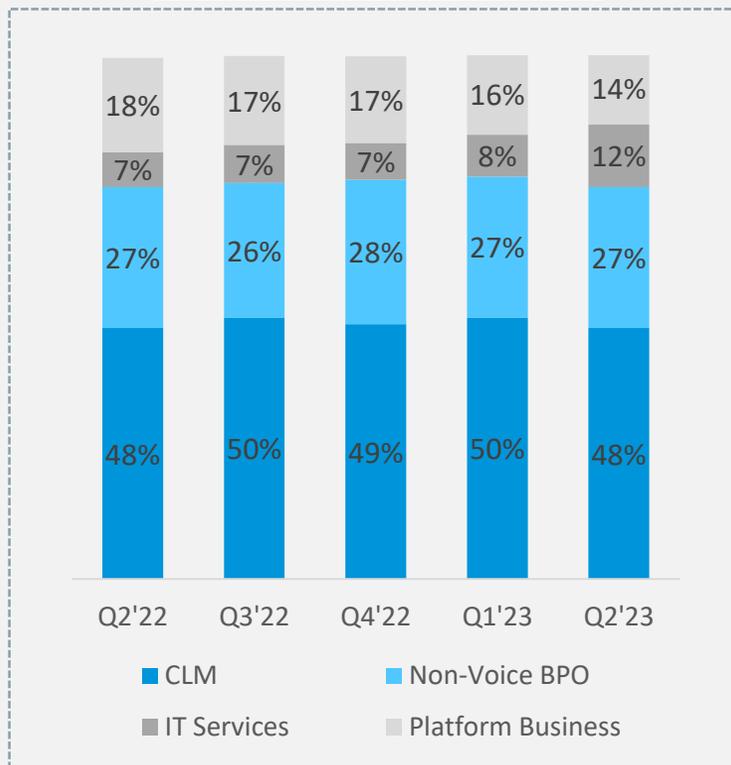
### Revenue (Rs Cr)



### EBITDA from operations (Rs Cr)



## Revenue Distribution

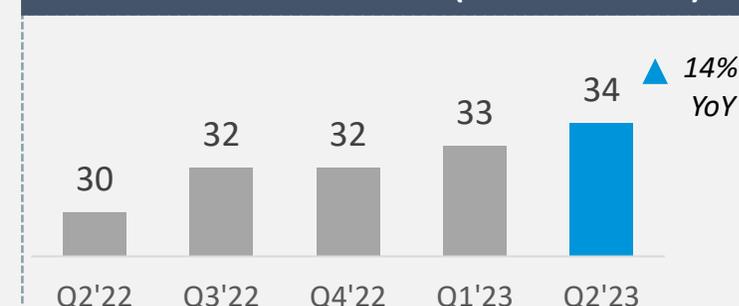


## Operating Metrics

### Revenue / Employee (Rs '000)



### HRO Records Processed (Allsec: in lakhs)

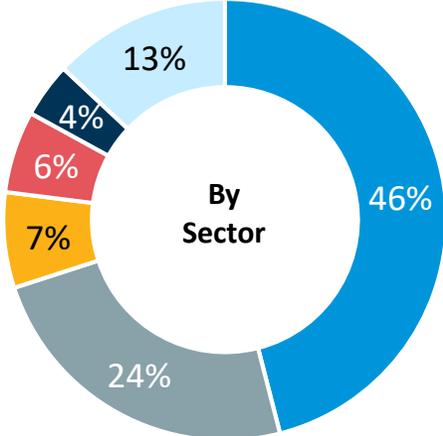


### Key developments:

- **CLM:** Revenue up 23% YoY. New logo addition continue to be high with **17 logos added during the quarter**
- **Non-Voice BPO:** Collection business revenue up 23% YoY
- **Platform based services (InsurTech in US and HRO in India):** HRO platform payslips processed per quarter up 14% YoY **on the back of 41 new logos won**

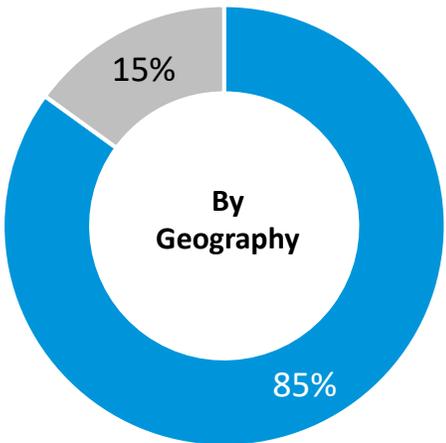
# Global Technology Solutions– Revenue Distribution and Customer Insights

## Diversified Revenue Base



Revenue-base diversified across sectors

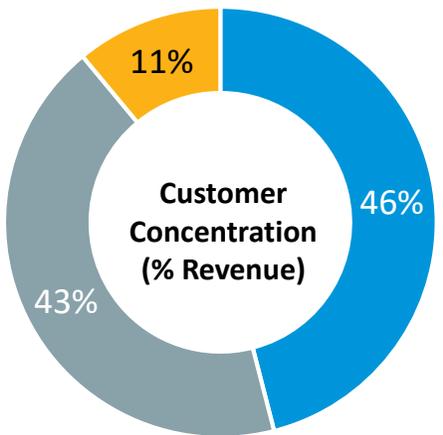
- BFSI
- IT/ITES
- Retail
- Telecom
- Industrials
- Others



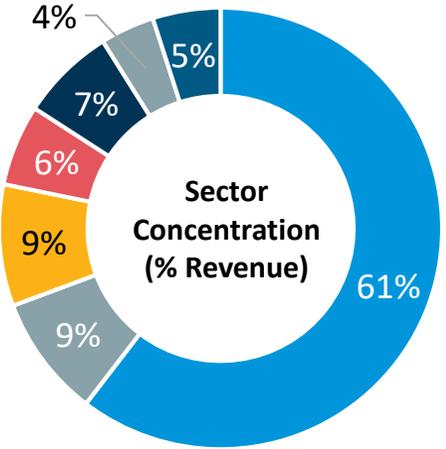
India is the main focus

- India
- NA

## Customer Insights (CLM and Non-voice BPO)



■ Top 10 ■ Next 40 ■ Others



- BFSI
- e-commerce
- Telecom/Media
- Manufacturing
- IT/ITES
- Retail/FMCG
- Others

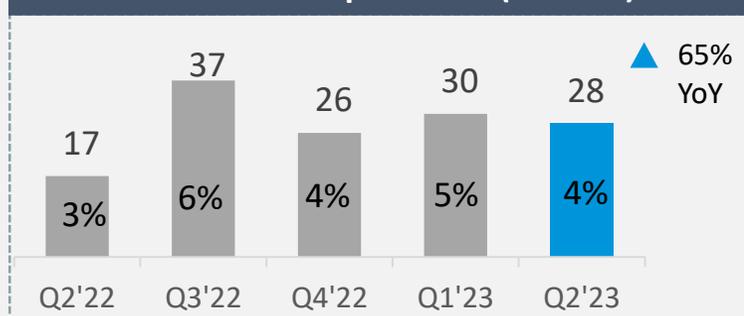
# Operating Asset Management – Performance Snapshot

## Financial Metrics

### Revenue (Rs Cr)

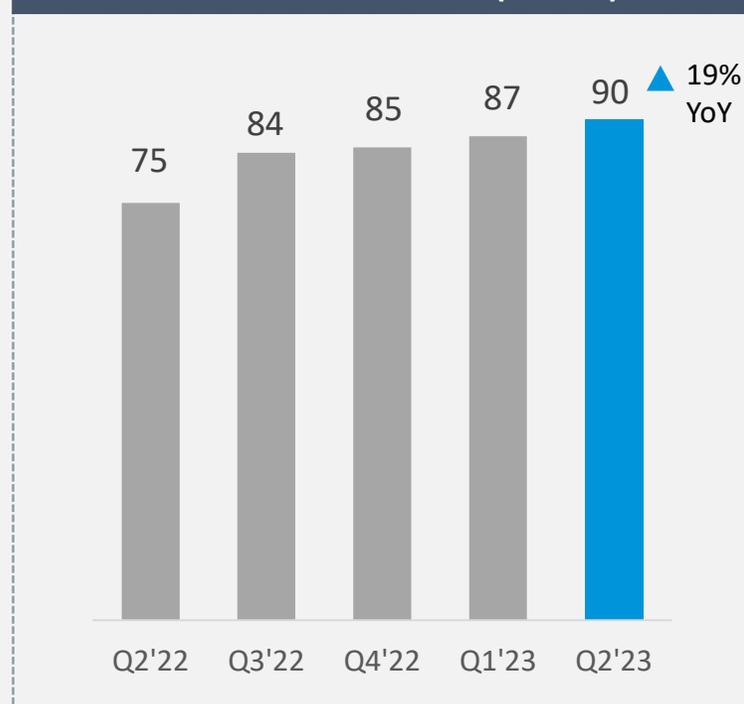


### EBITDA from operations (in Rs Cr)

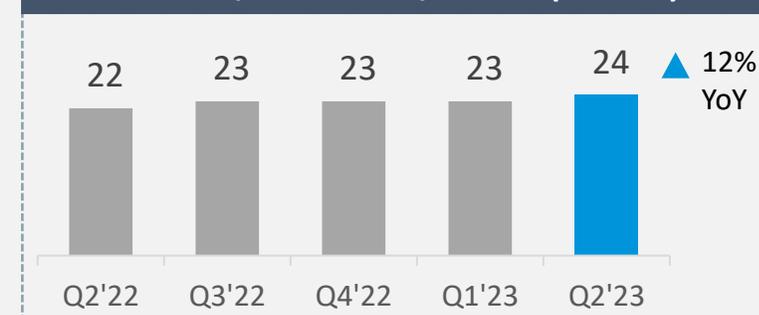


## Operating Metrics

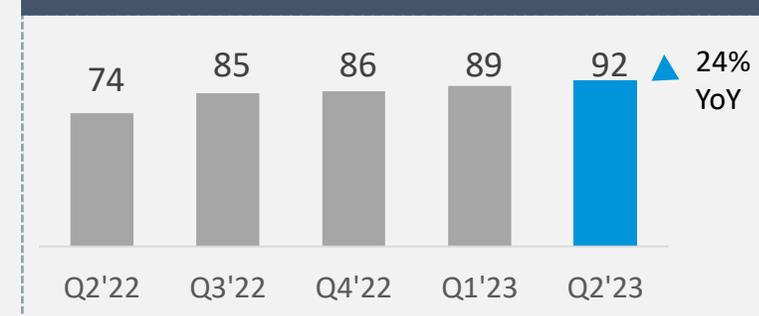
### Associate Headcount# (in '000)



### Revenue/Headcount/Month (Rs '000)



### Core to Associate

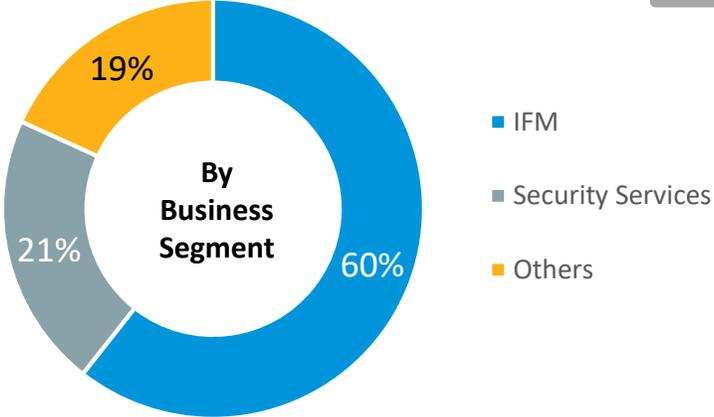


### Key developments:

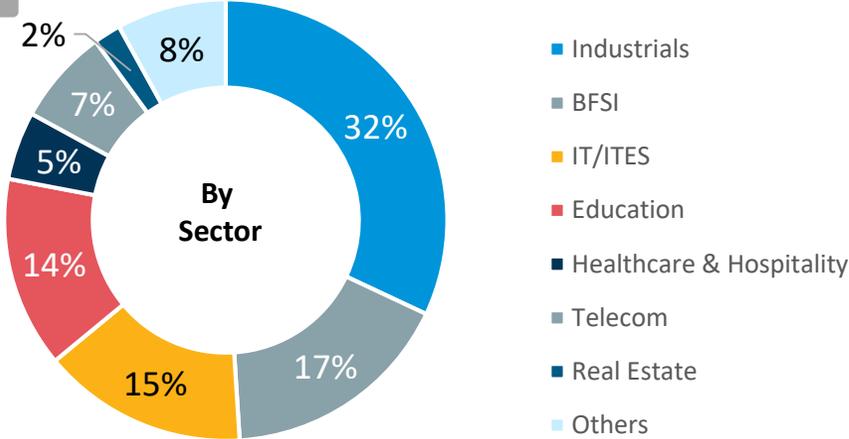
- **IFM:** Revenue up 33% YoY. EBITDA margin stabilized on QoQ basis, decline of ~300 bps YoY is due to contract re-negotiation with major customer.
- **Terrier Security:** Revenue up 28% on YoY basis on the back of strong HC addition (up 25% YoY), customer sales momentum remains strong with 21 new customers in the quarter

# Operating Asset Management – Revenue Distribution and Customer Insights

## Revenue Distribution

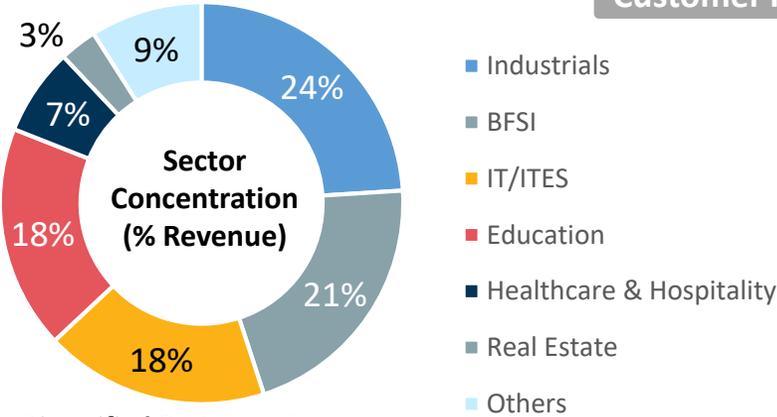


IFM\* is the largest business segment

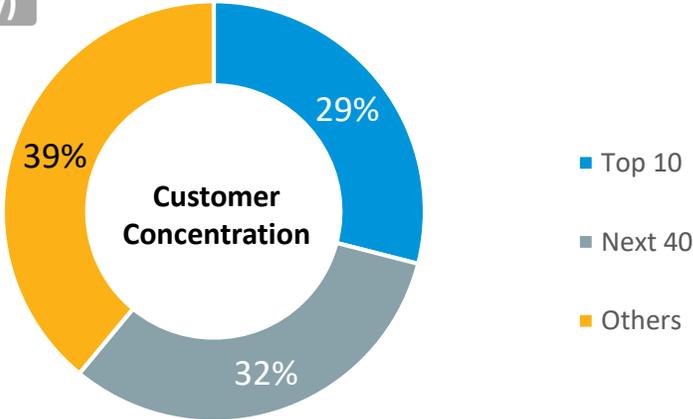


Revenue-base diversified across sectors

## Customer Insights (IFM\*+Security)



Diversified Customer Exposure:  
Healthy distribution of contracts across customers

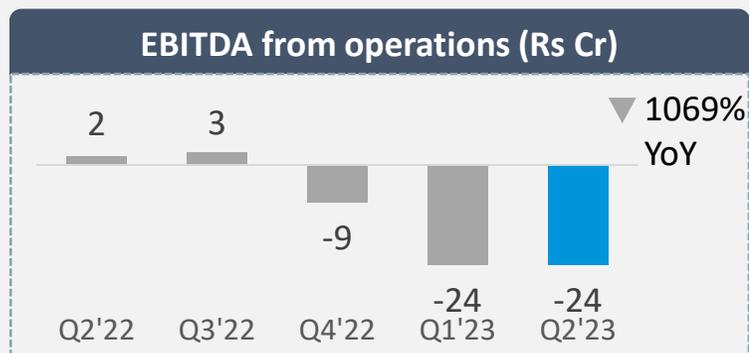
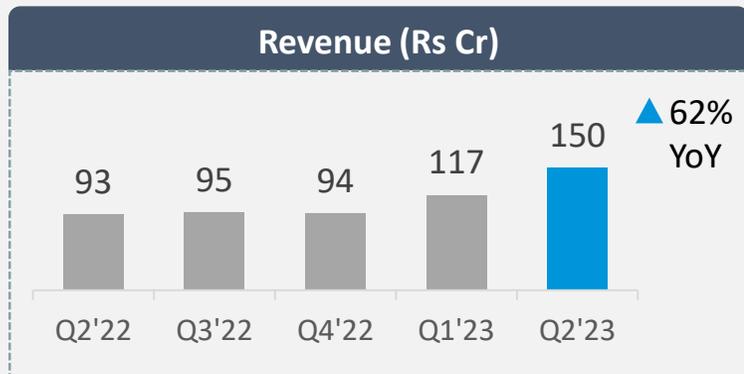


No Customer concentration risk  
Top 10 customers account for 29% of revenue

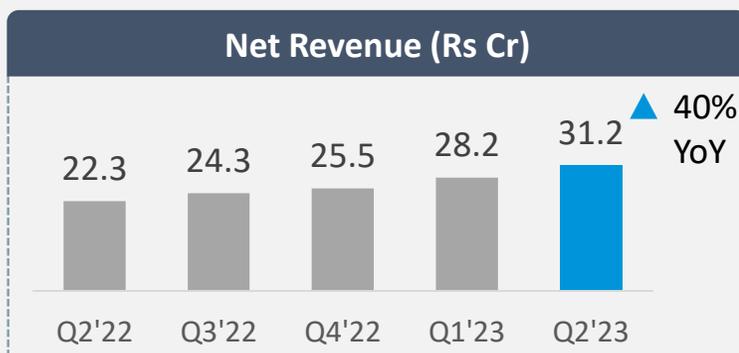
\*Integrated Facility Management

# Product Led Business – Performance snapshot

## Product Led Business



## Monster.com



## Monster - Key developments:

- Mobile first revamp of product leading to improvement of mobile app ratings from 3.7 to 4.5
- Beta readiness of key product improvements in place – talent platform, Assessment platform
- New user acquisition at highest ever with 1.8 million registrations in Q2, 6-month active user base grew to 17.3 M; Traffic grew by 25 % to 44.2 Million
- Zuno fellowship launched with the more than 130 K candidates registering for the fellowship test.
- C-SAT & NPS continues to be above targets – 90 % & 20 respectively

# Product Led Business – Blue Collar Jobs

## Qjobs

### New Users Signed Up (in Mn)



### External Customers



### New Job Openings (in Mn)



### NPS



- 5.2 million+ candidates and 1.4 million+ active job openings in Q2'23
- 670k monthly recruiter-candidate interactions facilitated
- 432K+ candidates' upskilling facilitated in Q2'23

## Key Operational Metrics

- New Product Launched – Grow (L&D Platform)
- 275K + Monthly Active Users & 100K + DAU
- 50K+ Learners in Qpedia
- 200k+ Responses submitted through Survey
- 35L Attendance Markings monthly
- New Features
  - Seamless two-way sync between Worq and Grow
  - Advanced user permissions management

## Dash

## Key Operational Metrics

- Expanded user base to 420K with 180K + MAU
- >15K monthly leads
- >6,600+ monthly units sold across Loans, Salary Advance, and Savings categories
- INR 67+ Cr Annual GTV Run Rate (Employee benefits delivered)

“  
Annexures

# Income Statement

Particulars ( in ₹ cr)	Q2 FY23	Q2 FY22	Q1 FY23	YoY	QoQ
<b>Revenue from operations</b>	<b>4,273</b>	<b>3,228</b>	<b>3,979</b>	<b>32%</b>	<b>7%</b>
Less:					
Employee benefit expense	(3,658)	(2,758)	(3,395)	33%	8%
Cost of material	(129)	(70)	(98)	84%	33%
Other expenses	(351)	(287)	(333)	22%	5%
<b>Total expenses</b>	<b>(4,138)</b>	<b>(3,116)</b>	<b>(3,826)</b>	<b>33%</b>	<b>8%</b>
<b>EBITDA</b>	<b>135</b>	<b>112</b>	<b>153</b>	<b>20%</b>	<b>-12%</b>
Other income	9	7	7	18%	22%
Interest	(26)	(19)	(20)	36%	30%
Depreciation and amortisation	(68)	(49)	(61)	39%	11%
<b>Operating EBT</b>	<b>50</b>	<b>52</b>	<b>79</b>	<b>-4%</b>	<b>-37%</b>
Share of Profit from Associates (net of tax)	(0)	(0)	0	-58%	-310%
<b>Profit before tax and Exceptional items</b>	<b>50</b>	<b>51</b>	<b>79</b>	<b>-3%</b>	<b>-37%</b>
Exceptional items	-	(9)	-	100%	100%
<b>Profit before tax</b>	<b>50</b>	<b>60</b>	<b>79</b>	<b>-17%</b>	<b>-37%</b>
Tax	(10)	(19)	(12)	-46%	-14%
<b>Profit after tax</b>	<b>40</b>	<b>41</b>	<b>68</b>	<b>-4%</b>	<b>-41%</b>
EBITDA margin	3.16%	3.48%	3.85%	-32 bps	-70 bps
PAT margin	0.93%	1.28%	1.70%	-35 bps	-77 bps
Basic EPS	2.84	2.54	4.52	12%	-37%
Diluted EPS	2.82	2.51	4.48	13%	-37%

# Balance Sheet

Particulars ( in ₹ cr)	30-Sep-22	31-Mar-22	Var %
<b>Non-current assets</b>			
Fixed assets	579	498	16%
Intangibles	1,176	1,174	0%
Investments	3	10	-75%
Other non-current assets	634	568	12%
<b>Current assets</b>			
Trade receivables	1,459	1,270	15%
Unbilled revenue	1,247	1,062	17%
Cash and cash equivalents	598	604	-1%
Loans & other current assets	240	184	30%
<b>Total assets</b>	<b>5,938</b>	<b>5,371</b>	<b>11%</b>
<b>Equity</b>			
Share capital	148	148	0%
Other equity	2,379	2,290	4%
Non controlling interest	175	131	34%
<b>Debt</b>			
Long term debt	13	24	-45%
Short term debt	527	564	-6%
<b>Other liabilities</b>			
Trade & other payables	109	115	-6%
Other Financial Liabilities	1,795	1,321	36%
Other provisions & tax liabilities	791	778	2%
<b>Total equities and liabilities</b>	<b>5,938</b>	<b>5,371</b>	<b>11%</b>

# Segment Reporting

Particulars ( in ₹ cr)	Quarter Ended				
	Sep-22	Jun-22	Mar-22	Dec-21	Sep-21
<b>Workforce Management Platform</b>					
Revenue	2,943	2,758	2,644	2,545	2,214
Reported EBITDA	79	94	94	81	43
<i>Reported EBITDA %</i>	<i>2.69%</i>	<i>3.41%</i>	<i>3.56%</i>	<i>3.18%</i>	<i>1.94%</i>
<b>Global Technology Services Platform</b>					
Revenue	529	507	477	468	431
Reported EBITDA	85	83	88	87	78
<i>Reported EBITDA %</i>	<i>15.98%</i>	<i>16.37%</i>	<i>18.45%</i>	<i>18.59%</i>	<i>18.10%</i>
<b>Operating Asset Management Platform</b>					
Revenue	651	597	577	578	490
Reported EBITDA	28	30	26	37	17
<i>Reported EBITDA %</i>	<i>4.27%</i>	<i>5.03%</i>	<i>4.43%</i>	<i>6.37%</i>	<i>3.44%</i>
<b>Product Led Business</b>					
Revenue	150	117	94	95	93
Reported EBITDA	(24)	(24)	(9)	3	2
<i>Reported EBITDA %</i>	<i>-15.94%</i>	<i>-20.51%</i>	<i>-9.57%</i>	<i>3.16%</i>	<i>2.15%</i>

# Segment Reporting: Old Segments

Particulars ( in ₹ cr)	Quarter Ended				
	Sep-22	Jun-22	Mar-22	Dec-21	Sep-21
<b>Workforce Management Platform</b>					
Revenue	2,865	2,683	2,570	2,472	2,143
Reported EBITDA	75	90	89	76	39
<i>Reported EBITDA %</i>	<i>2.60%</i>	<i>3.35%</i>	<i>3.47%</i>	<i>3.09%</i>	<i>1.84%</i>
<b>Global Technology Services Platform*</b>					
Revenue	757	700	645	636	595
Reported EBITDA	65	62	84	94	85
<i>Reported EBITDA %</i>	<i>8.61%</i>	<i>8.86%</i>	<i>12.98%</i>	<i>14.86%</i>	<i>14.22%</i>
<b>Operating Asset Management Platform</b>					
Revenue	651	597	577	578	490
Reported EBITDA	28	30	26	37	17
<i>Reported EBITDA %</i>	<i>4.27%</i>	<i>5.03%</i>	<i>4.43%</i>	<i>6.37%</i>	<i>3.44%</i>

\* 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**



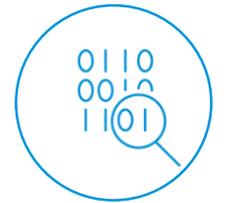
**Facilities Maintenance**



**Manned & Electronics Security**



**F&A & HR Operations**



**Infrastructure & Digital IT Services**

\*Including gig-based workforce

## 1

### Digital Hire-to-Retire

#### *Sourcing*



#### *Recruiting*



#### *Onboarding*



#### *Payrolling*



#### *Compliance*

- **Digital sourcing** via auto-hiring engines, with digital pre-screening and assessment via [Qjobs](#) and [Monster](#)
- **End-to-end ATS ReQuit platform** from mandate creation, to candidate tagging and offer generation
- **Paperless on-boarding** of candidates within 14 minutes via [POP](#) (Paperless On-boarding Platform)
- **Flow-through payroll processing** and pay-slip generation on proprietary cloud-based **QPay** and **SmartPay** platforms
- **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

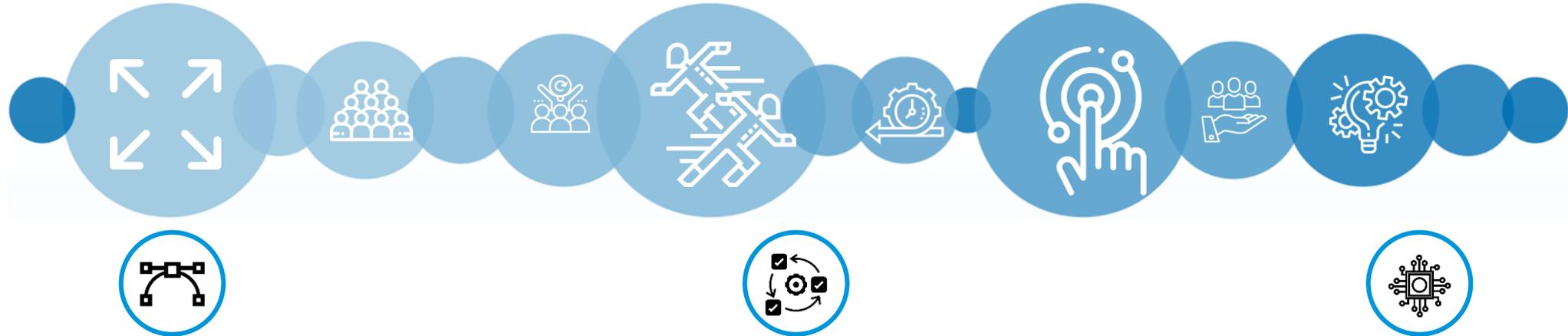
#### *Processes and tooling*

- **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

- **~504,000\*** associates and employees deployed over **600+** cities
- International operations in **South East Asia, North America & the Middle East**
- **3,000+ clients, 63 offices** in **34 Indian cities**

## Agility

- **An entrepreneurial** 15 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](http://www.qesscorp.com)



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