



Investor Presentation

Q4'FY22 & FY22

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**Leading domestic private sector employer,
with ~437,000 FTE**

FY22 – Highlights

	FY22	YoY Change
 Headcount	437k	↑ 20%
 Revenue	₹ 13,692 cr.	↑ 26%
 EBITDA¹	₹ 668 cr.	↑ 16%
 % EBITDA	4.9%	↓ 45bps
 PAT	₹ 251 cr.	↑ 241%
 OCF	₹ 428 cr.	↓ 27%

	FY22	YoY Change
 Net Debt / (cash)	₹ (16) cr.	↓ ₹ 18 cr.
 RoE	10.0%	↑ 692bps
 Book value per share	INR 164.7	↑ 4%
 EPS (dil.)	INR 16.2	↑ 318%
 Dividend Paid / Share²	INR 4	
 Share Price Movement³	-5.7%	Sensex Movement 18.3%

1 EBITDA from Operations

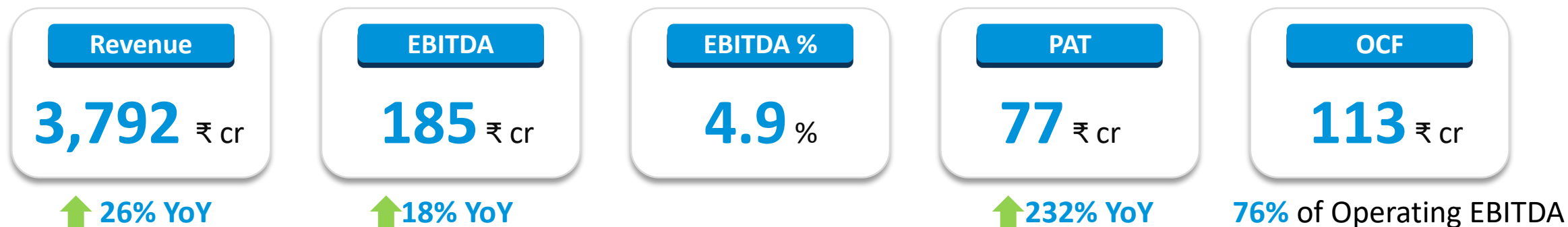
2 Board to consider additional dividend on 31st May, 2022

3 Calculated on the basis of closing price on 31st March'21 and 31st March'22 respectively

FY22 Business Highlights

- ▶ **Workforce Management:** Associate headcount crosses 300k
- ▶ **General Staffing:** Ranked 48 in SIA's 50 Largest Global Staffing Firms 2021 list
- ▶ **Conneqt:** Crosses ₹ 100cr in monthly revenue
- ▶ **Monster:** Raised ₹ 137.5cr at a valuation of ~ USD 100mn in Dec'21, up from ~USD 15mn in Jan'18
- ▶ **Cross sell initiatives:** Yields 70 wins and ACV of over ₹ 500 cr
- ▶ **Great Place to Work:** Re-affirmed with better and above-industry average score
- ▶ **Capital Allocation Policy:** Paid first-ever dividend at ₹ 7 per share for FY21, followed by interim dividend of ₹ 4/- per share for FY22

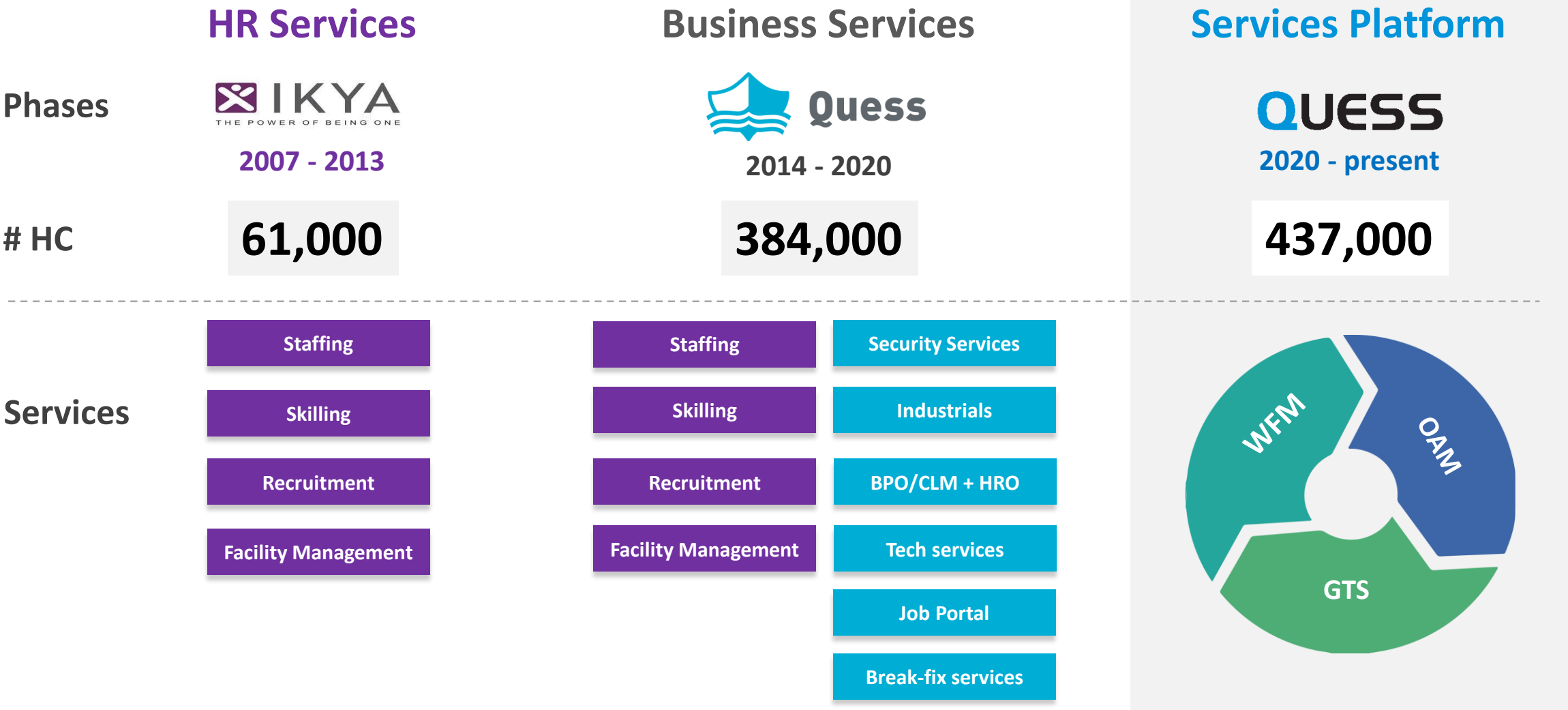
Q4FY22 – Financial Highlights



	Workforce Management	Global Technology Solutions	Operating Asset Management
Revenue % Change	2,570 ₹ cr 28% YoY	645 ₹ cr 22% YoY	577 ₹ cr 24% YoY
EBITDA % Change	89 ₹ cr 20% YoY	84 ₹ cr 14% YoY	26 ₹ cr -17% YoY

“ [Company Overview

From HR Services to a digitally-enabled Services Platform

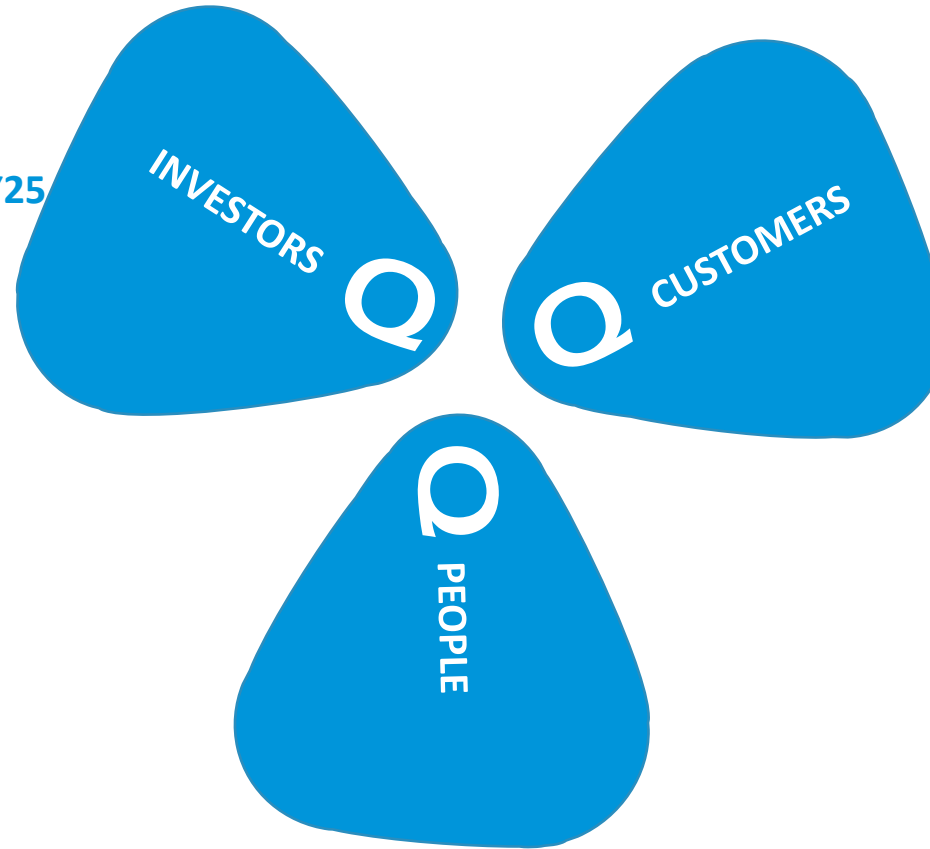


Our operations are spread across synergistic platforms



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%

20% Return on Equity



20% Y-o-Y OCF growth



Sustained Growth

- 20% EBITDA CAGR through enhanced sales capabilities, cutting edge technology, and improved cross-sell capability
- Portfolio adjustments to turnaround or exit underperforming businesses



Higher EBITDA To PAT Conversion

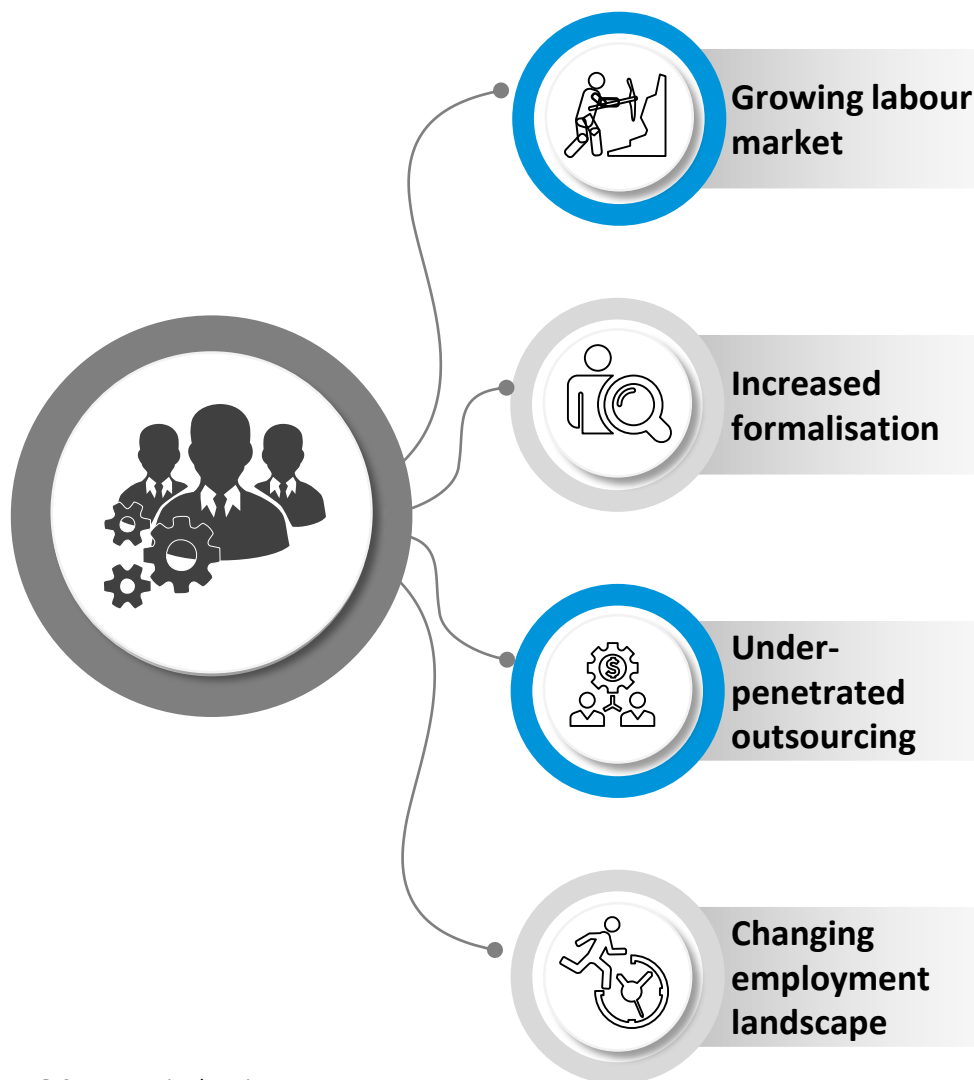
- Operating leverage through scale and technology intervention
- Prudent debt levels



Judicious Capital Allocation

- Capital allocation strategically aligned to 20% Return on Equity
- ~33% of FCF returned to shareholders over 3 years

We enjoy massive **macroeconomic tailwinds**



- India to remain fastest growing major economy in 2022[@]
 - ~ 563^{\$} 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[^] to increase from 20.8% currently to 30.3% by 2025
 - ~43 million new PF subscribers and ~70 million new ESIC subscribers in India since FY18
 - GST registered firms increased from 7.5mn in 2017 to over 13mn currently
- Indian companies increasingly exploring outsourcing to drive productivity and flexibility
 - 0.7%^{*} penetration of flexi staffing in India as compared to ~3% in most developed markets^{**}
- 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[#] million jobs and contribute incremental 1.25%[#] to country's GDP over the long term

@ Source: United Nations

[^] Source: Goldman Sachs, 2021

^{*} Source: Indian Staffing Federation, 2019

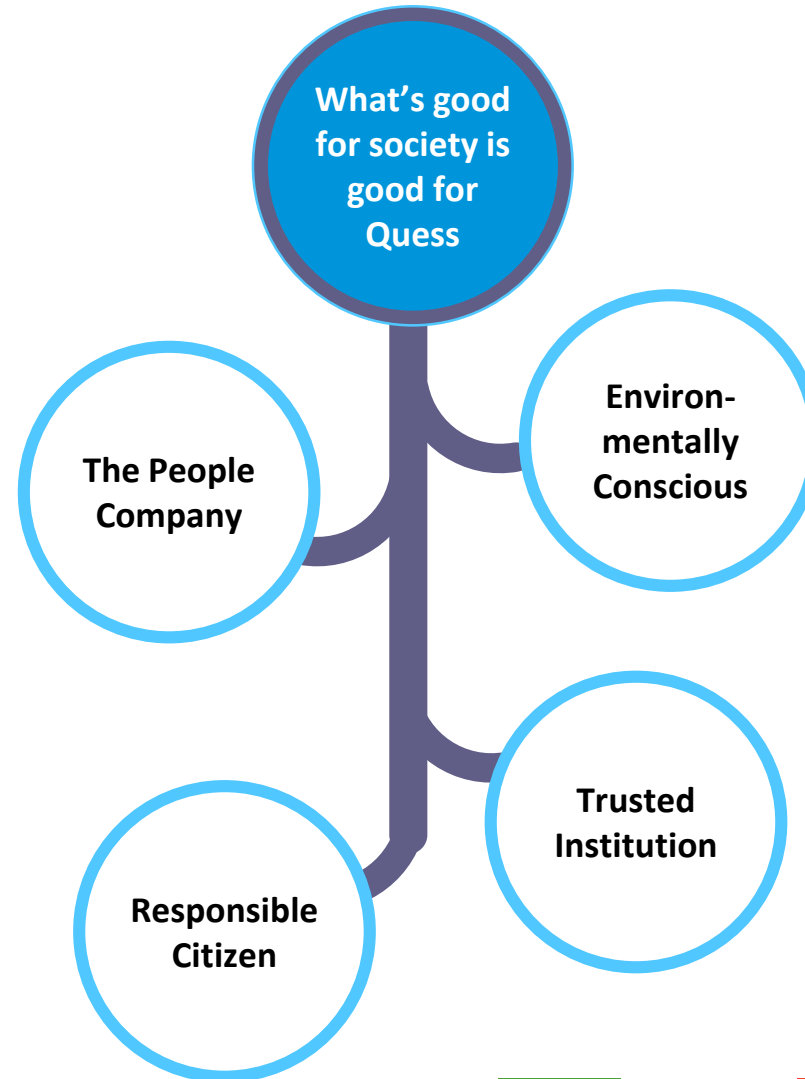
^{**} Source: World Employment Confederation

[#] 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%)** hired in FY22 were from outside Tier 1 and Tier 2 cities
- **~17% of our ~437K employees (~29% of core)** are women as on 31 March 2021
- Re-certified **Great Place to Work**
- In internal employee satisfaction survey, out of 110,000 respondents, **83% rated themselves Very Satisfied or Satisfied with Quess**
- **Keeping India safe** through our network ~19,000 security professionals
- **Infrastructure renovation for 74 schools** was carried out **benefiting 13,741 students** and teachers
- Through School Health Programs **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



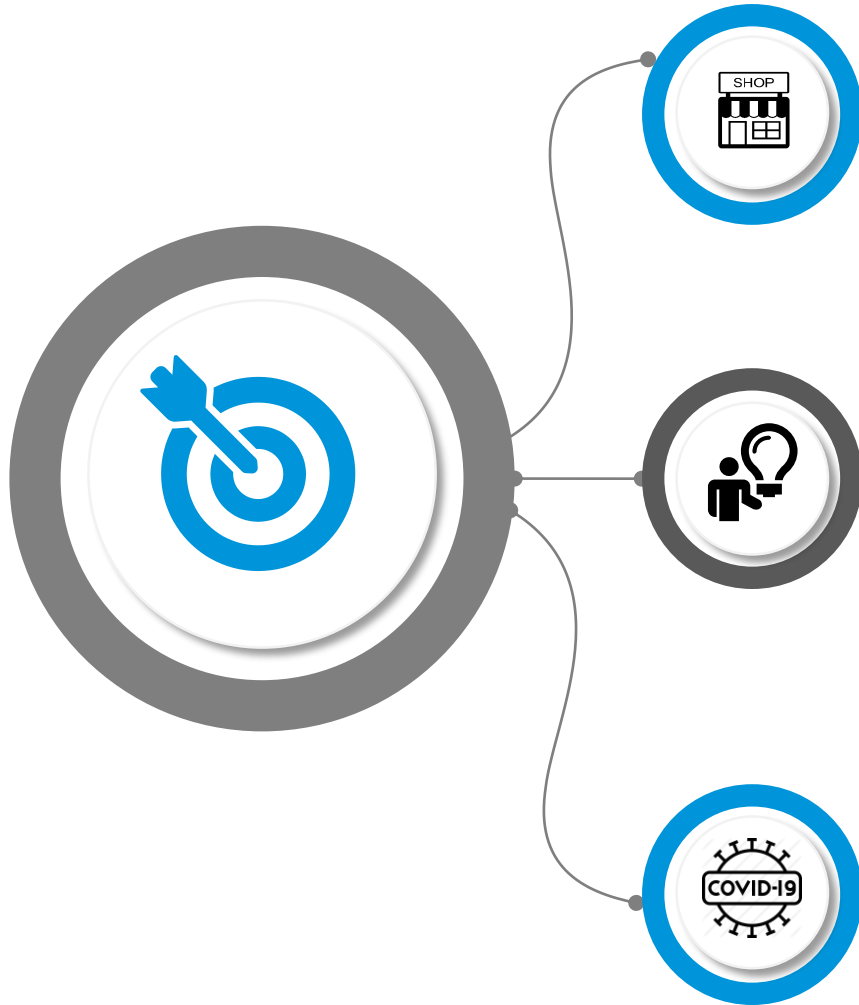
- **6.0 million sq. ft.** of green spaces maintained across India in FY22
- Business model drives **e-waste reduction** - ~1million devices repaired by QDigi in FY22
- **Responsible waste management**, including ~10,700 kgs of e-waste disposed responsibly and ~10,300 kgs of paper waste shredded and recycled 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 to continuously improve the security posture
- 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 Q4 operating environment



■ Opportunity-rich hiring environment...

- Q4 saw cumulative GST collection of ₹ 4,13,500cr, an increase of 6% on QoQ basis
- The Monster Employment Index (MEI)* saw hiring activity increased by 6% between Mar-21 and Mar-22
- Our Allsec payroll data shows a 17% increase in same-customer payslips processed in Mar this year on YoY basis, reflecting broad-based growth in employment amongst large enterprises across sectors.
- IT, BFSI, Manufacturing and Retail sectors have especially shown strong improvement in recruitment activity

■ Opening of Singapore economy and 'Great resignation wave' in India key drivers

- Selection business accelerated on the back of increased permanent staffing mandates
- Opening of Singapore economy provided tailwinds to overseas IT staffing business

■ Omicron wave shorter than anticipated

- Facilities management and security services recovered partially by focusing on non IT/ITES and Education sectors
- Food business continued to be impacted from delays in work from office

FY22 Financial Updates

Revenue:

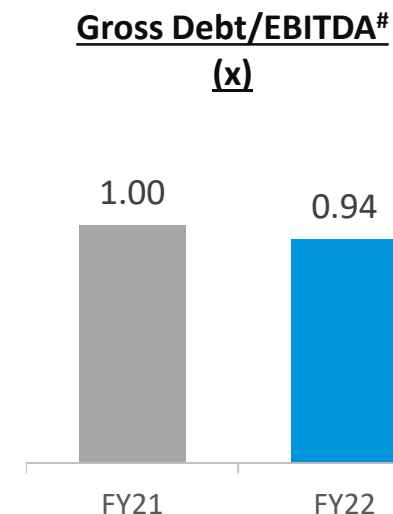
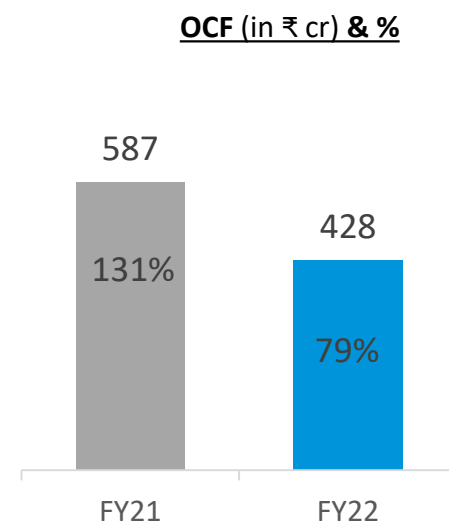
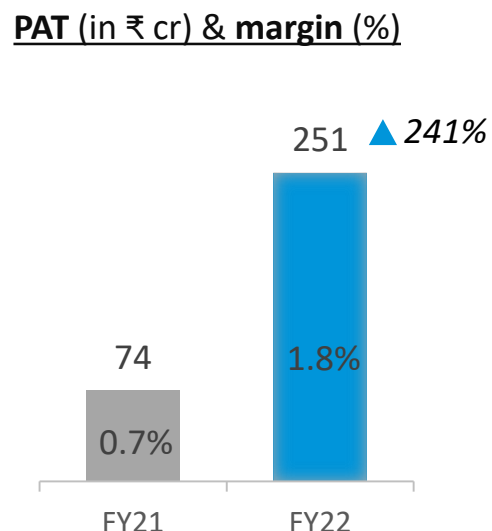
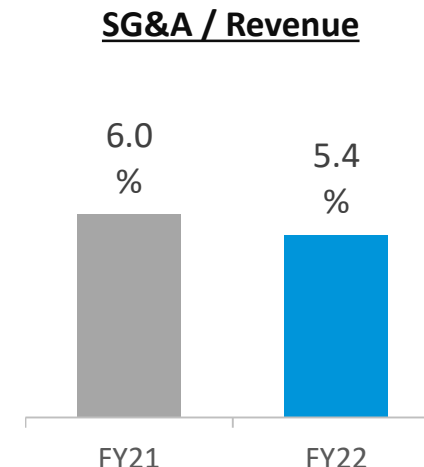
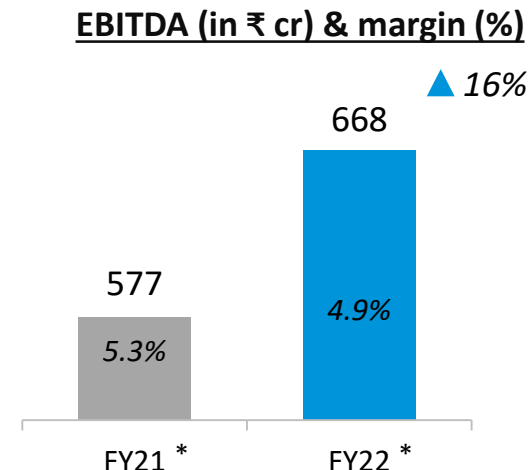
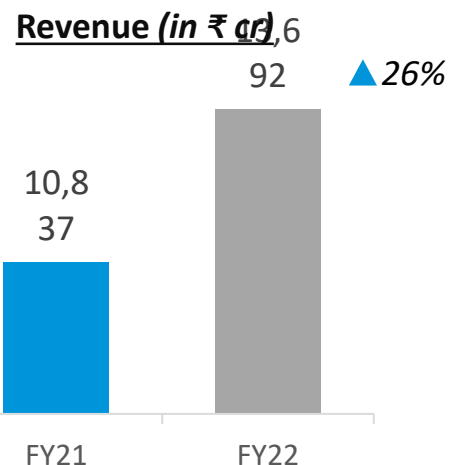
- Up **26% YoY** driven by General Staffing (up **28%**), QITS (up **42%**), and Conneqt (up **28%**)

Profitability:

- EBITDA from operations up **16% YoY to ₹ 668 cr**, lower than revenue growth due to service mix change
- SG&A / Revenue **decreased YoY from 6.0% to 5.4%** due to operational efficiencies
- PAT up **241% YoY**

Cash Generation:

- FY22 OCF / Operating EBITDA **conversion at 79%**, exceeding the guidance of 70%
- Net cash position sustained at **₹16 cr in FY22 against ₹34 cr in FY21**, despite revenue growth



*EBITDA from operations, excludes Provision of ₹ 119cr towards legacy government business in FY21 and excludes extraordinary ECL of ₹ 44 cr in FY22

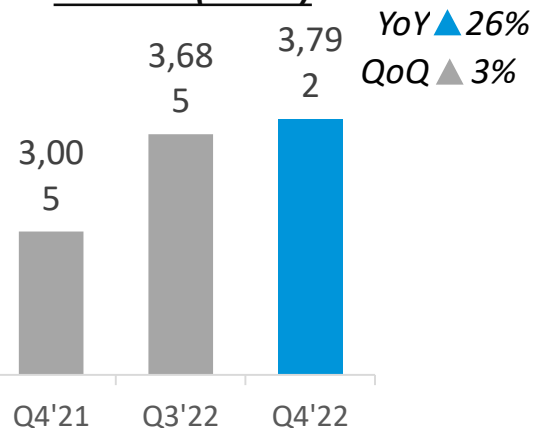
For FY21: Current maturities of long term debt has been reclassified from other financial liabilities as per schedule III of the Company Act

Q4'22 Financial Updates

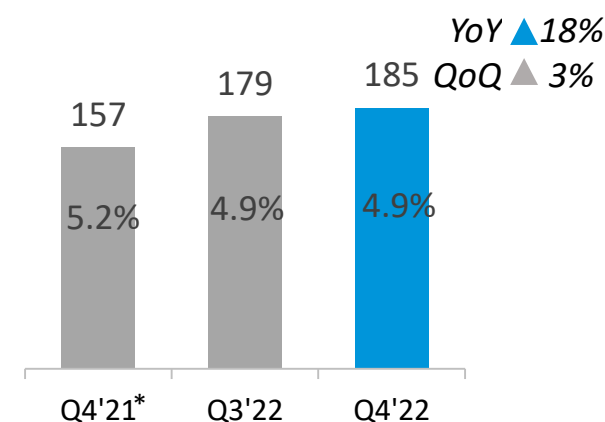
Revenue:

- Up **26% YoY** driven by General Staffing (up 25%), QITS (up 62%), and IFM (up 27%)
- Up **3% QoQ**, given macroeconomic tailwinds and strong execution. General Staffing (up 3%) QITS (up 6%), and Conneqt (up 5%)

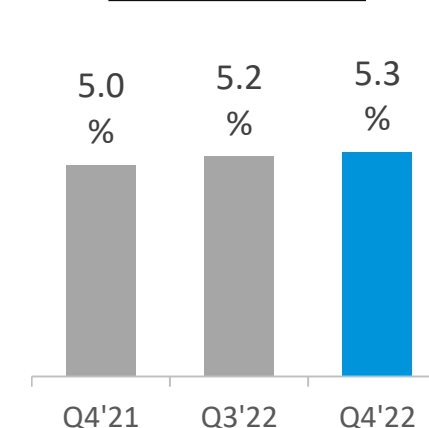
Revenue (in ₹ cr)



EBITDA (in ₹ cr) & margin (%)



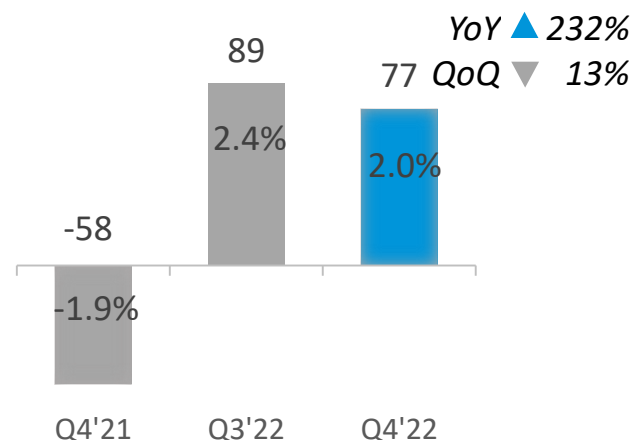
SG&A / Revenue



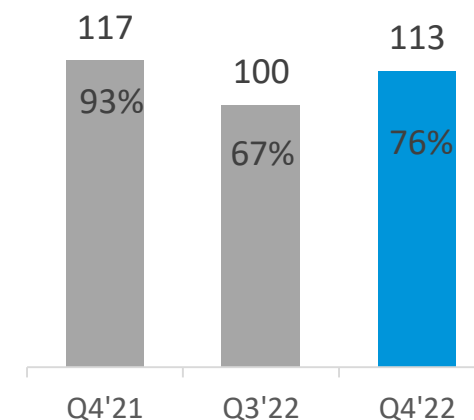
Profitability:

- EBITDA from operations **up 18% YoY to ₹ 185 cr**, lower than revenue growth due to service mix change
- SG&A / Revenue increased YoY from 5.0% to 5.3% due to increased business activity
- PAT down 13% QoQ due to higher depreciation and amortization expenses

PAT (in ₹ cr) & margin (%)



OCF (in ₹ cr) & %



Cash Generation:

- Q4'22 OCF/Operating EBITDA **conversion at 76%**
- DSO stable at 56 days**
- Company achieved net cash position ₹ 16cr in Q4'22 against net debt position of ₹ 108cr in Q3'22

* EBITDA from operations, excludes Provision of ₹ 119cr towards legacy government business

For FY21: Current maturities of long term debt has been reclassified from other financial liabilities as per schedule III of the Company Act

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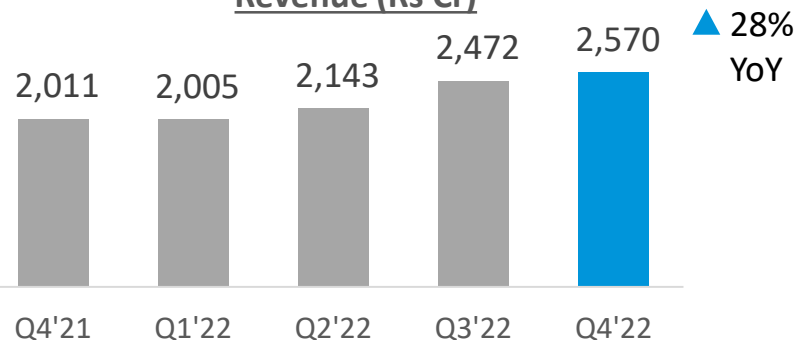


Platform-wise Updates

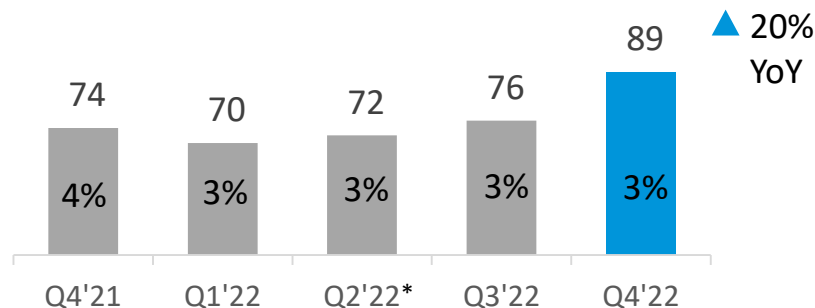
Workforce management – Performance Snapshot

Financial Metrics

Revenue (Rs Cr)

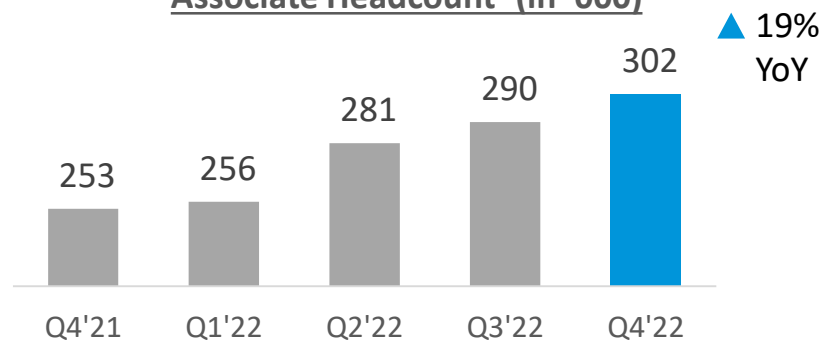


EBITDA from operations (Rs Cr)

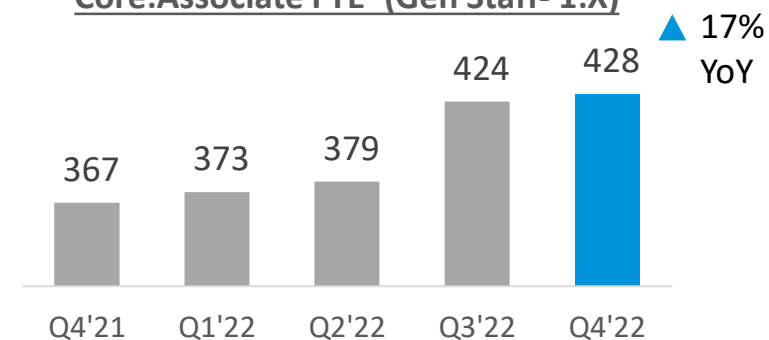


Operating Metrics

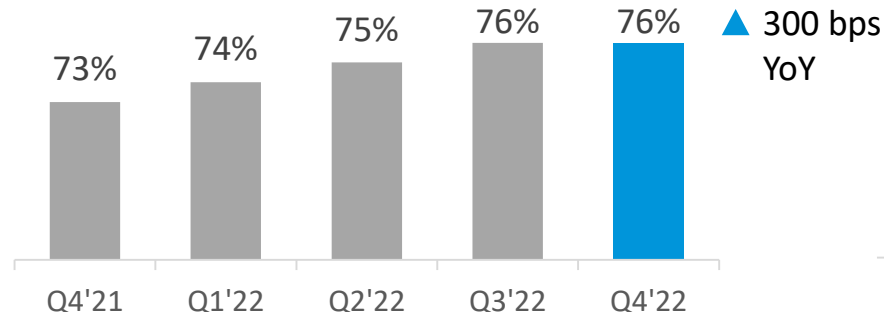
Associate Headcount# (in '000)



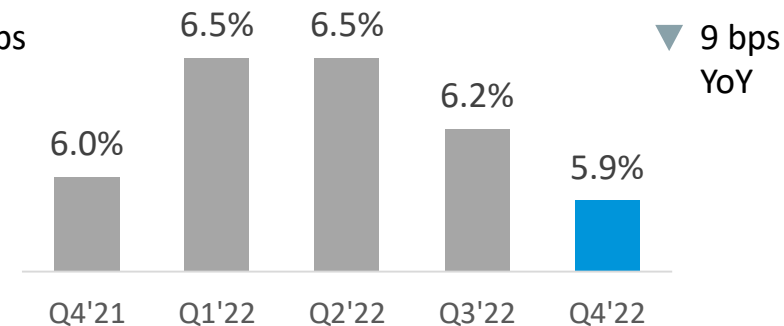
Core:Associate FTE^(Gen Staff- 1:X)



Collect & Pay - Headcount



SG&A / Revenue (IT Staff)

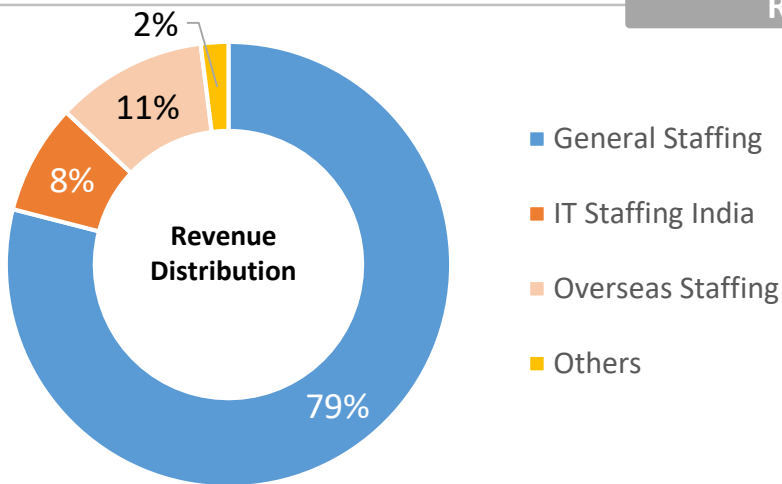


Key developments:-

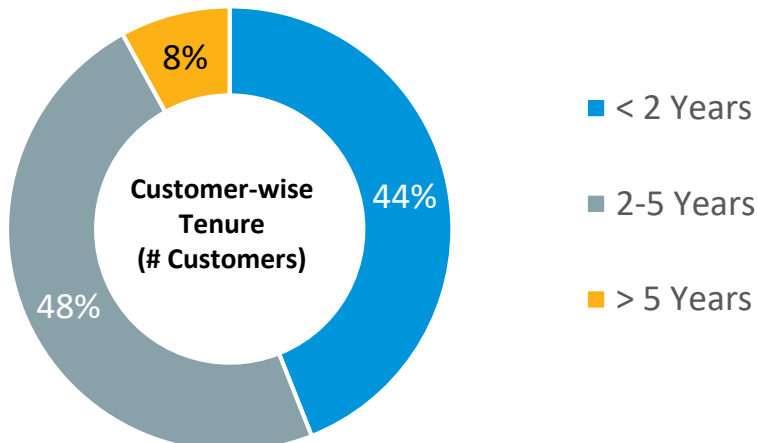
- **General Staffing** headcount crossed >285k. Retail and Telecom were key drivers. Revenue up 25% YoY
- **IT Staffing** domestic headcount up by 10% YoY with improved mix towards high margin. EBITDA up 33% YoY. Continued focus on high margin segments and strengthened delivery to drive profitability growth. HC with >10k GM now makes up 33% of total associate base
- **Comtel** saw 62% QoQ growth in EBITDA on the back of ease in covid restrictions in Singapore

Workforce Management – Revenue Distribution and Customer Insights

Revenue Distribution

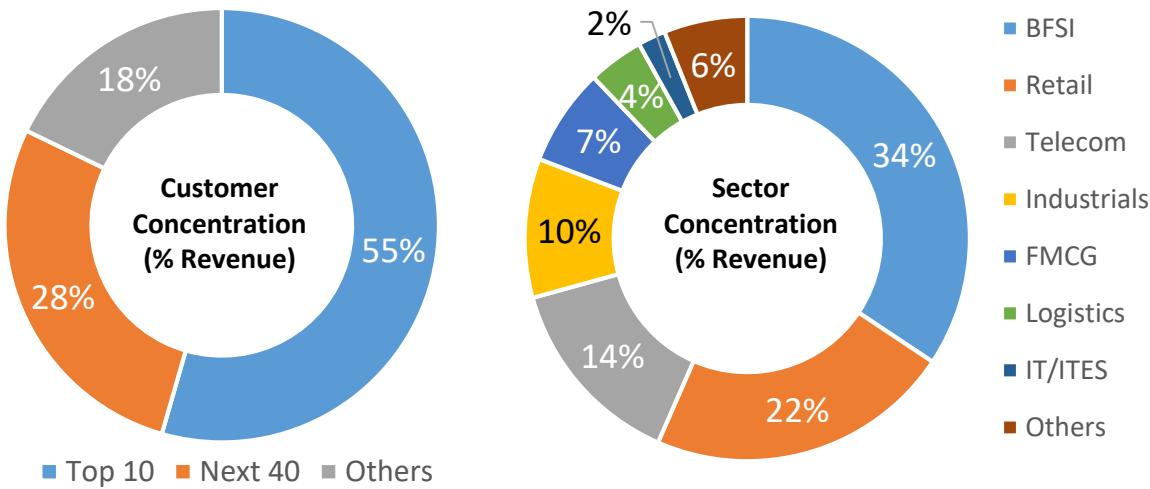


Staffing constitutes 98% of the revenue

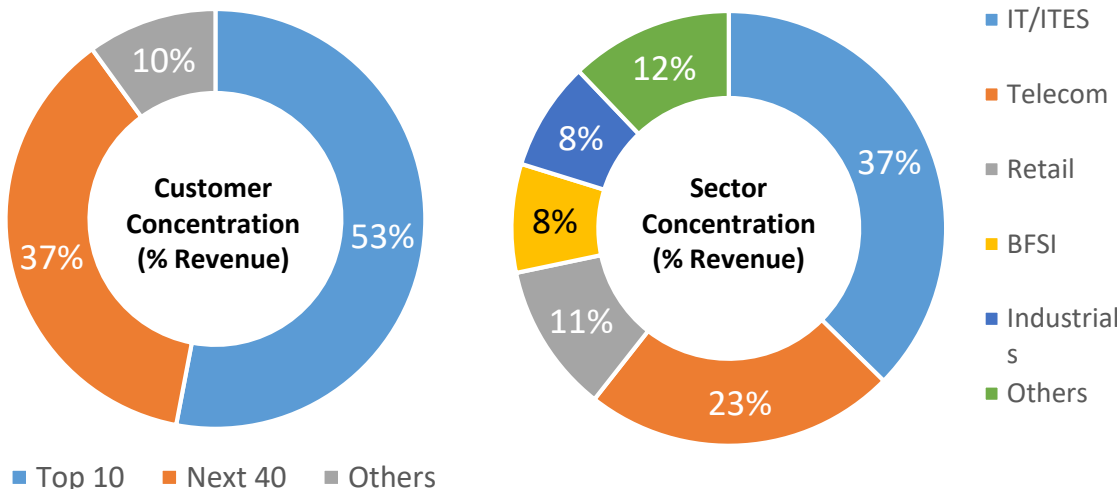


Good customer loyalty & healthy new customer addition:
Half of the Customers have tenure >2 years

Customer Insights (Gen. Staffing)



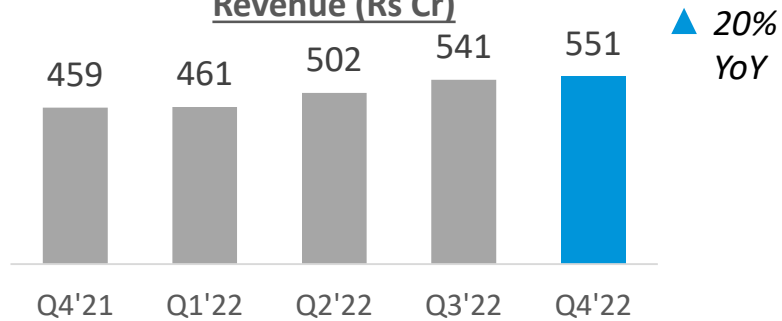
Customer Insights (QITS)



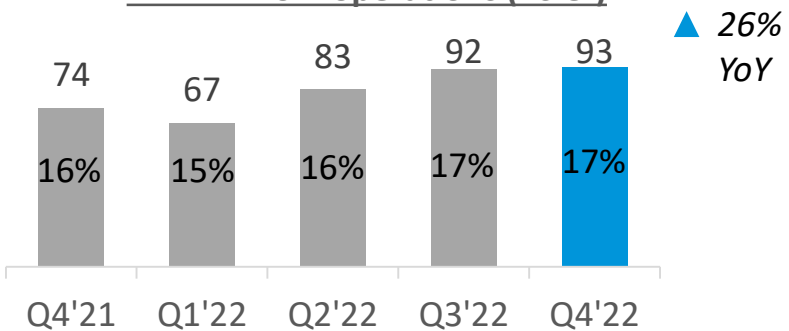
Global Technology Solutions – Performance Snapshot (excl. Emerging Businesses)

Financial Metrics

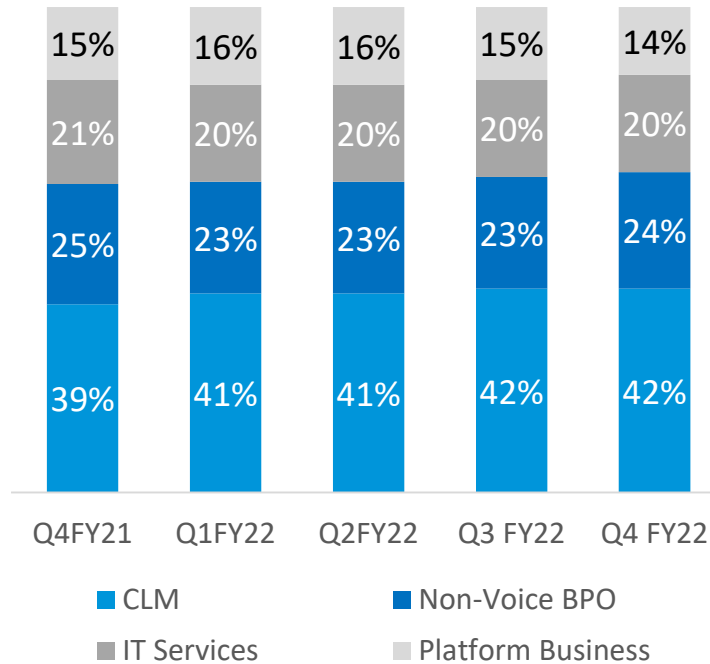
Revenue (Rs Cr)



EBITDA from operations (Rs Cr)

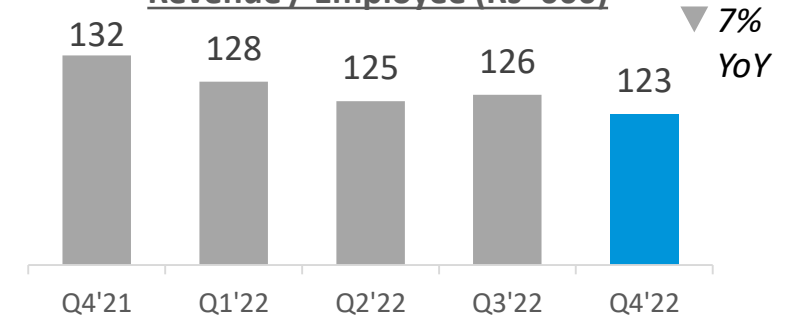


Revenue Distribution

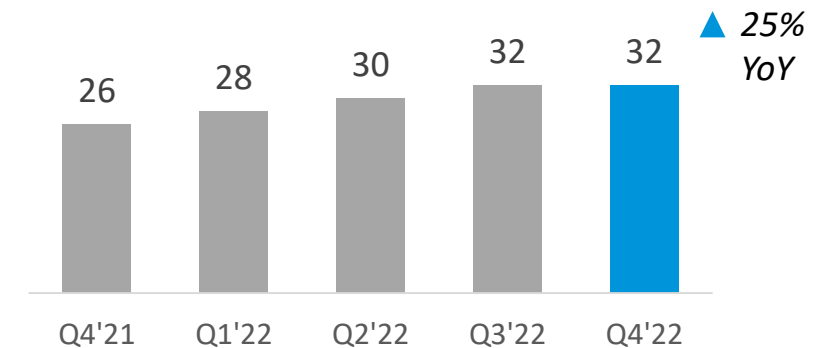


Operating Metrics

Revenue / Employee (Rs '000)



HRO Records Processed (Allsec: in lakhs)

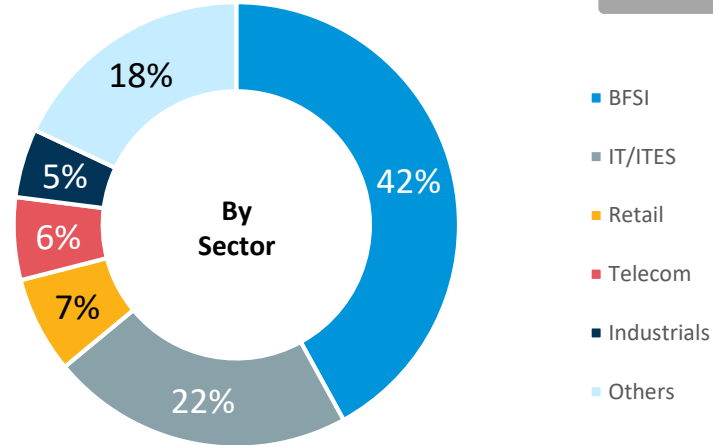


Key developments:

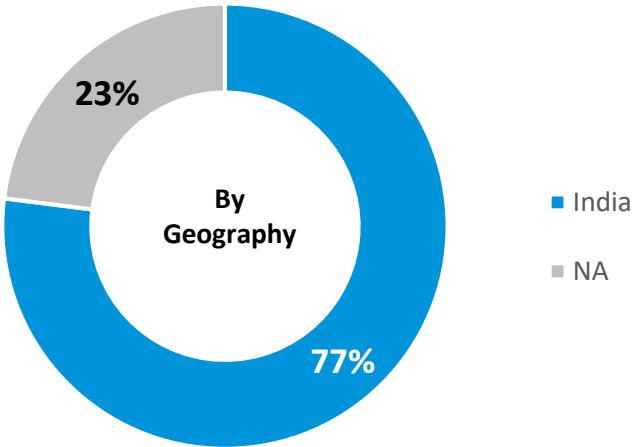
- **CLM:** Revenue up 30% YoY. Non-voice CLM grew by 61% YoY. New logo addition continues to be high with 27 logos added during the quarter
- **Non-CLM BPO:** Collection business revenue up 13% YoY as restrictions across country eased up.
- **Platform based services (InsurTech in US and HRO in India):** HRO platform payslips processed per quarter up 25% YoY
- **IT Services:** Domestic IT Services up 30% YoY

Global Technology Solutions– Revenue Distribution and Customer Insights (excl. Emerging Businesses)

Diversified Revenue Base

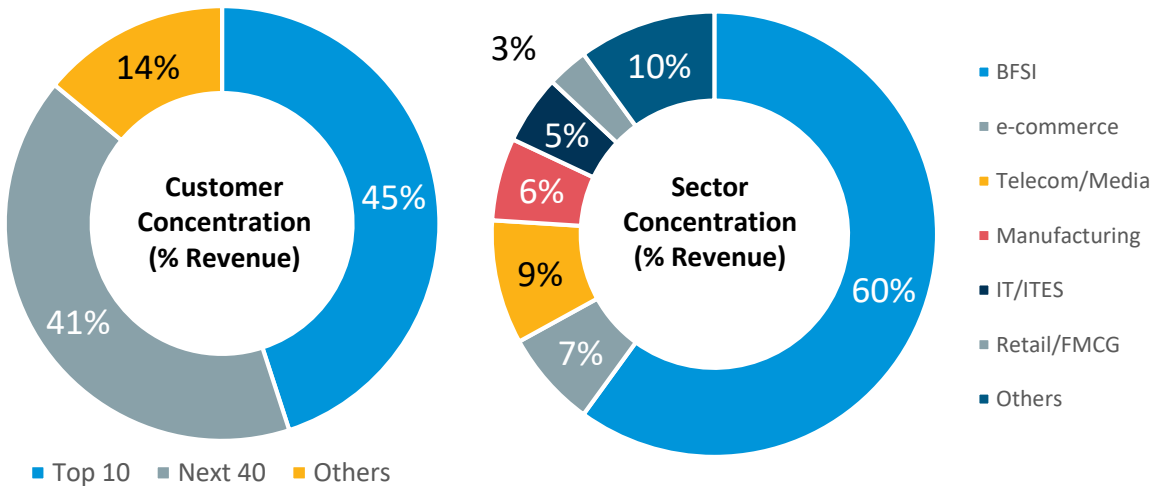


Revenue-base diversified across sectors

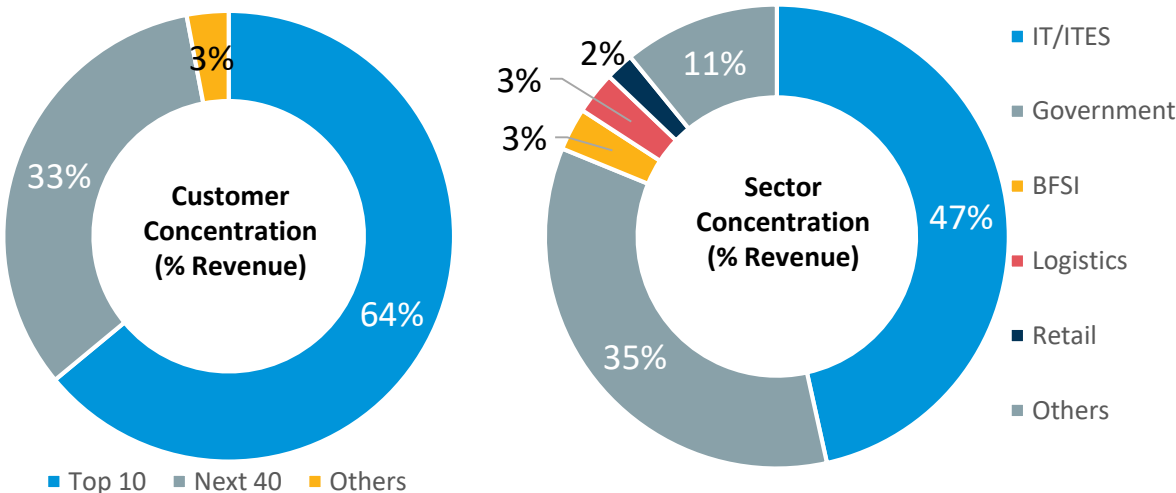


India is the main focus

Customer Insights (CLM and Non-voice BPO)



Customer Insights (IT Services)

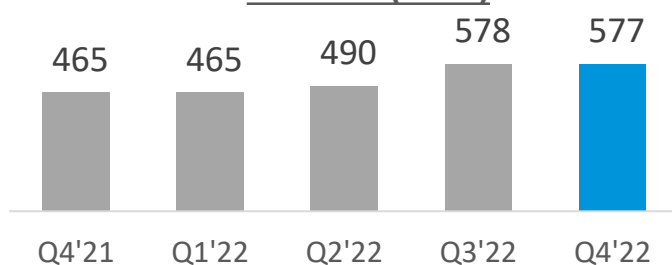


Operating Asset Management – Performance Snapshot

Financial Metrics

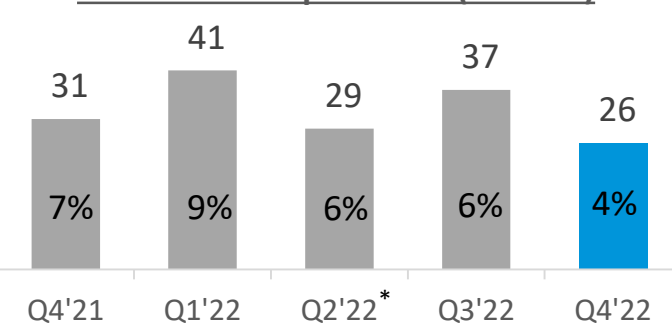
Revenue (Rs Cr)

▲ 24%
YoY



EBITDA from operations (in Rs Cr)

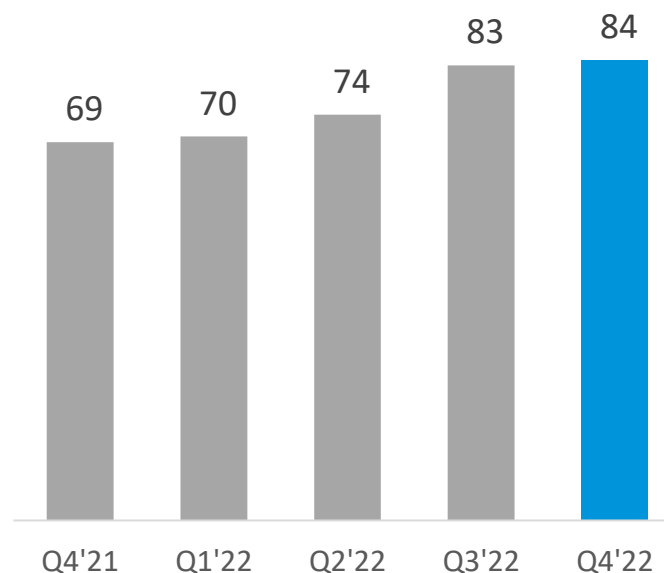
▼ 17%
YoY



Operating Metrics

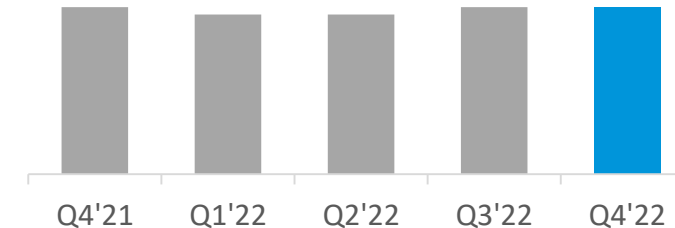
Associate Headcount ('000)

▲ 22%
YoY



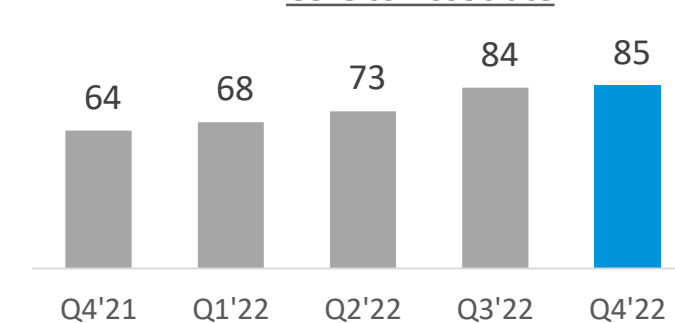
Revenue/Headcount/Month (Rs '000)

↔ YoY



Core to Associate

▲ 33%
YoY

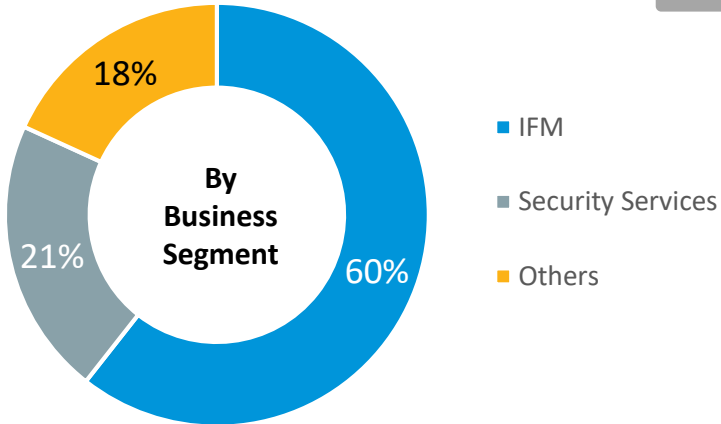


Key developments:

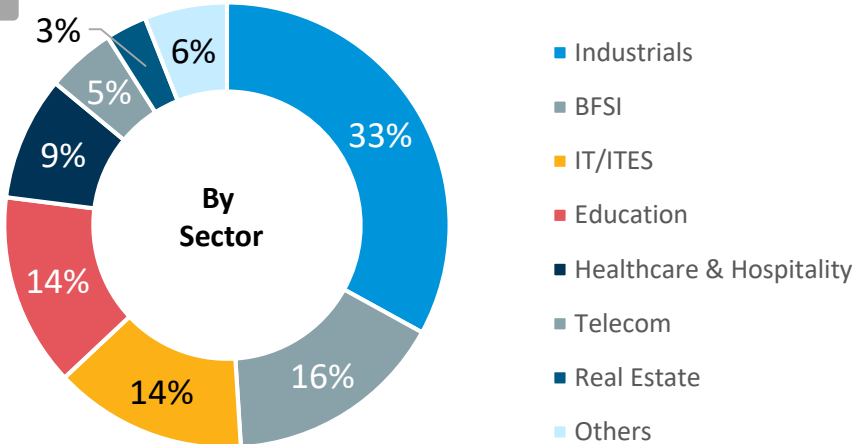
- **IFM:** Revenue up 27% YoY, with 20 client wins in the quarter. Margin declined by 340bps QoQ due to provisions taken in normal course of business
- **Terrier Security:** Revenue up 21% on YoY basis on the back of strong HC addition (up 17% YoY), customer sales momentum remains strong with 18 new customers in the quarter

Operating Asset Management – Revenue Distribution and Customer Insights

Revenue Distribution

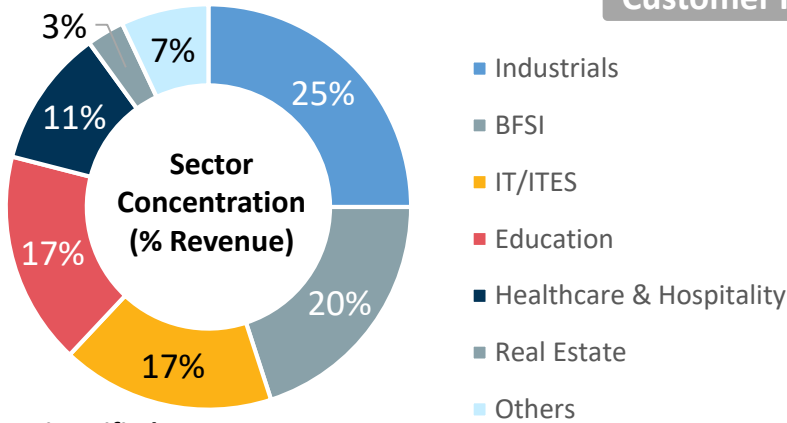


IFM* is the largest business segment

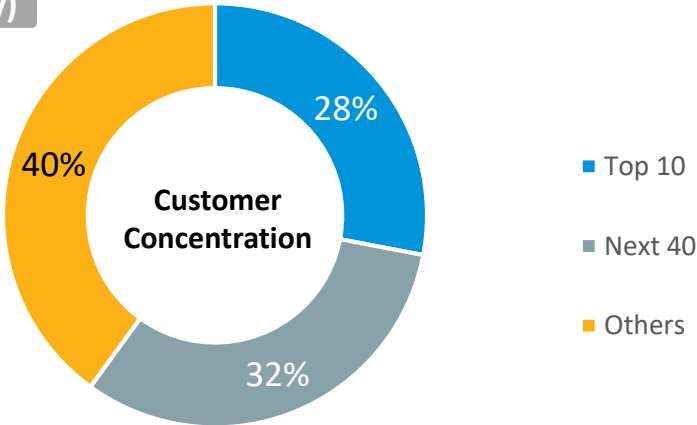


Revenue-base diversified across sectors

Customer Insights (IFM*+Security)



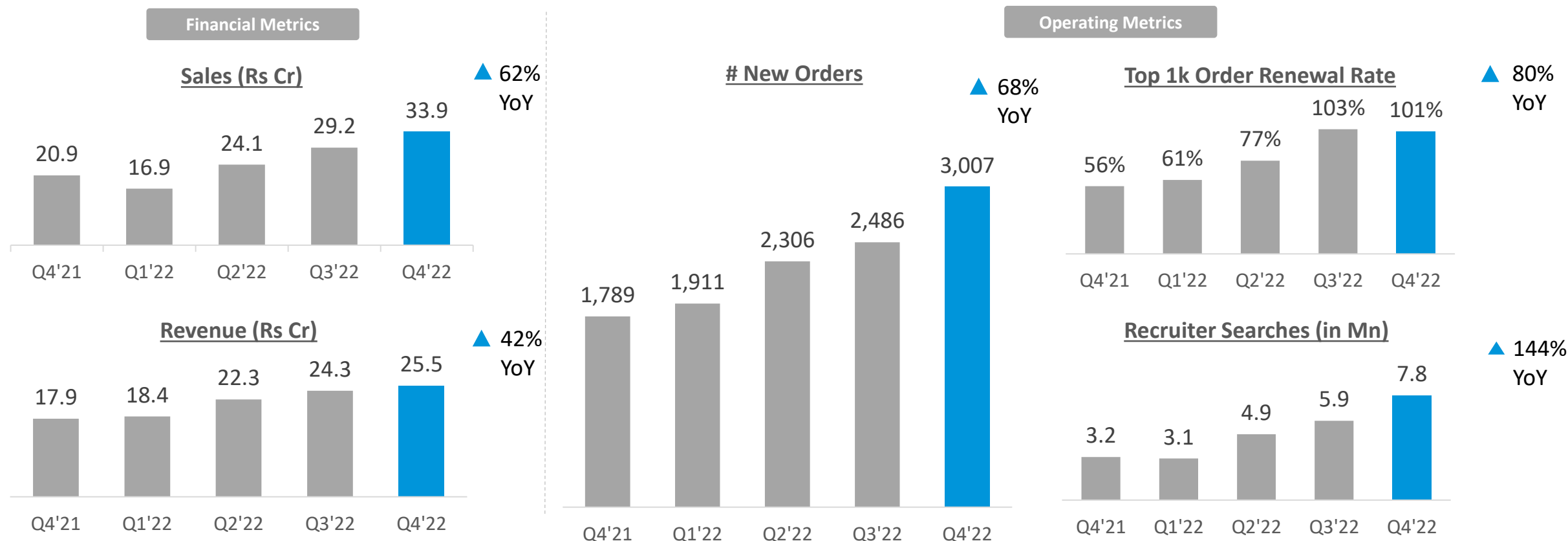
Diversified Customer Exposure:
Healthy distribution of contracts across customers



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

*Integrated Facility Management

Emerging Business – Monster.com – Performance snapshot



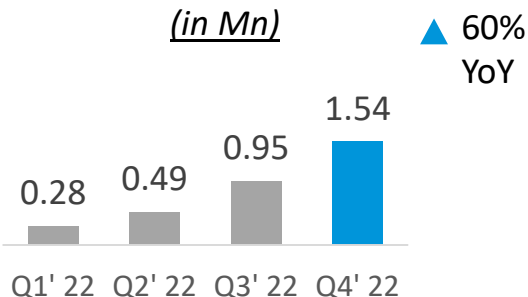
Key developments:

- Closure of first round of up to INR 137.5 Cr investment raised. **INR 62.5 Cr** received through CCPS subscription by investors as the first tranche
- 6 month active user base more than doubled in the year to 14.6 M; User Acquisition & Re-activation crossed **2 million** in the quarter.
- **28M Traffic** representing **20% YoY** growth with March traffic crossing 10 M ;
- Customer retention grew to **~73% (+26 % QoQ)** with focus on larger customers helping achieve **101% value renewals**
- Strategic Nurture Partnerships signed with **Salesforce** and **L&T Edutech** while Microsoft partnership has been significantly expanded

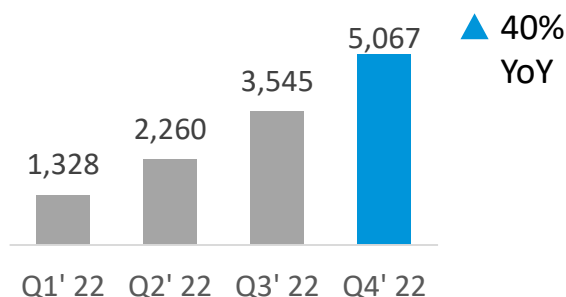
Emerging Businesses – Blue Collar Jobs



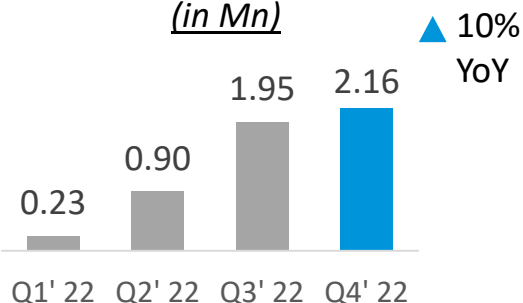
New Users Signed Up
(in Mn)



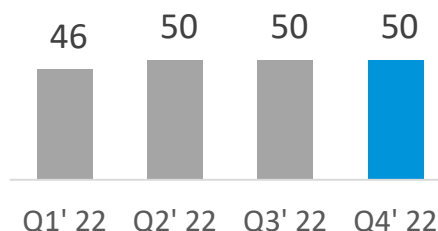
External Customers



New Job Openings
(in Mn)



NPS



- Qjobs platform crossed **3.5 million+ candidates** and **2 million+ active job openings** in FY22
- **1.13 M+ monthly recruiter-candidate interactions** being facilitated on Qjobs platform
- **500K+ candidates' upskilling** facilitated on Qjobs



Key Operational Metrics (Q4 FY22)

- 240K + Monthly Active Users & 100K + DAU
- 26L Attendance Markings Monthly and 6L + shifts supervised thru digital supervisor reducing manual effort
- Dedicated sales & marketing team hired for external monetization
- Beta launch for SEA Market



Key Operational Metrics (Q4 FY22)

- Expanded user base to 420K with 150K + MAU
- >15K monthly leads
- >6,400+ monthly units sold across Loans, Salary Advance, and Savings categories
- INR 66+ Cr GMV Annual Run Rate of benefits facilitated

“Annexures

Income Statement

Particulars (in ₹ cr)	Q4 FY22	Q4 FY21	Q3 FY22	YoY	QoQ
Revenue from operations	3,792	3,005	3,685	26%	3%
Less:					
Employee benefit expense	(3,228)	(2,563)	(3,102)	26%	4%
Cost of material	(84)	(57)	(77)	47%	8%
Other expenses	(295)	(346)	(326)	-15%	-9%
Total expenses	(3,607)	(2,967)	(3,506)	22%	3%
EBITDA	185	38	179	388%	3%
Extraordinary ECL charge	0	119	0		
EBITDA from Operations	185	157	179	18%	3%
Other income	5	3	3	40%	63%
Interest	(19)	(19)	(18)	4%	6%
Depreciation and amortisation	(56)	(49)	(43)	15%	30%
Operating EBT	114	(27)	121	-529%	-6%
Intangible amortisation	(8)	(6)	(6)	33%	33%
NCI Put Option Liability	(0)	2	(0)	-104%	5%
Share of Profit from Associates (net of tax)	(1)	(1)	(1)	-20%	12%
Profit before tax and Exceptional items	105	(31)	114	-435%	-8%
Exceptional items	1	-	-	100%	100%
Profit before tax	104	(31)	114	-430%	-9%
Tax	(27)	(27)	(25)	0%	6%
Profit after tax	77	(58)	89	-232%	-13%
EBITDA margin	4.87%	1.26%	4.87%	361 bps	bps
PAT margin	2.02%	-1.94%	2.40%	396 bps	-38 bps
Basic EPS	4.98	(4.29)	5.67	-216%	-12%
Diluted EPS	4.94	(4.22)	5.59	-217%	-12%

FY22	FY21	YoY
13,692	10,837	26%
(11,687)	(9,297)	26%
(279)	(201)	39%
(1,103)	(881)	25%
(13,068)	(10,379)	26%
623	458	36%
44	119	
668	577	16%
20	45	-56%
(79)	(99)	-20%
(165)	(205)	-19%
400	200	100%
(47)	(24)	96%
(0)	(13)	-97%
(2)	(11)	-85%
350	152	131%
(7)	(33)	-78%
358	185	94%
(107)	(111)	-4%
251	74	241%
4.55%	4.23%	33 bps
1.83%	0.68%	115 bps
16.32	3.92	316%
16.18	3.87	319%

Balance Sheet

Particulars (in ₹ cr)	31-Mar-22	31-Mar-21	Var %
Non-current assets			
Fixed assets	498	431	16%
Intangibles	1,174	1,104	6%
Investments	10	4	154%
Other non-current assets	568	591	-4%
Current assets			
Trade receivables	1,270	894	42%
Unbilled revenue	1,062	905	17%
Cash and cash equivalents	604	614	-2%
Loans & other current assets	184	175	5%
Total assets	5,371	4,720	14%
Equity			
Share capital	148	148	0%
Other equity	2,290	2,195	4%
Non controlling interest	131	94	39%
Debt			
Long term debt	24	54	-56%
Short term debt	564	526	7%
Other liabilities			
Trade & other payables	115	121	-5%
Other Financial Liabilities	1,321	1,037	27%
Other provisions & tax liabilities	778	545	43%
Total equities and liabilities	5,371	4,720	14%

For FY21: Current maturities of long term debt has been reclassified from other financial liabilities as per schedule III of the Company Act

Segment Reporting

Particulars (in ₹ cr)	Quarter Ended				
	Mar-22	Dec-21	Sep-21	Jun-21	Mar-21
Workforce Management Platform					
Revenue	2,570	2,472	2,143	2,005	2,011
Reported EBITDA	89	76	39	70	37
<i>Reported EBITDA %</i>	<i>3.47%</i>	<i>3.09%</i>	<i>1.84%</i>	<i>3.47%</i>	<i>1.85%</i>
EBITDA from operations			72		74
<i>EBITDA from operations %</i>			<i>3.34%</i>		<i>3.66%</i>
Global Technology Services Platform*					
Revenue	645	636	595	517	528
Reported EBITDA	84	94	85	59	74
<i>Reported EBITDA %</i>	<i>12.98%</i>	<i>14.86%</i>	<i>14.22%</i>	<i>11.50%</i>	<i>13.95%</i>
Operating Asset Management Platform					
Revenue	577	578	490	465	465
Reported EBITDA	26	37	17	41	-52
<i>Reported EBITDA %</i>	<i>4.43%</i>	<i>6.37%</i>	<i>3.44%</i>	<i>8.76%</i>	<i>-11.26%</i>
EBITDA from operations			29		31
<i>EBITDA from operations %</i>			<i>5.83%</i>		<i>6.60%</i>

* Includes Emerging Businesses

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

We lead with **technology** and **innovation**

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 ReQruit 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

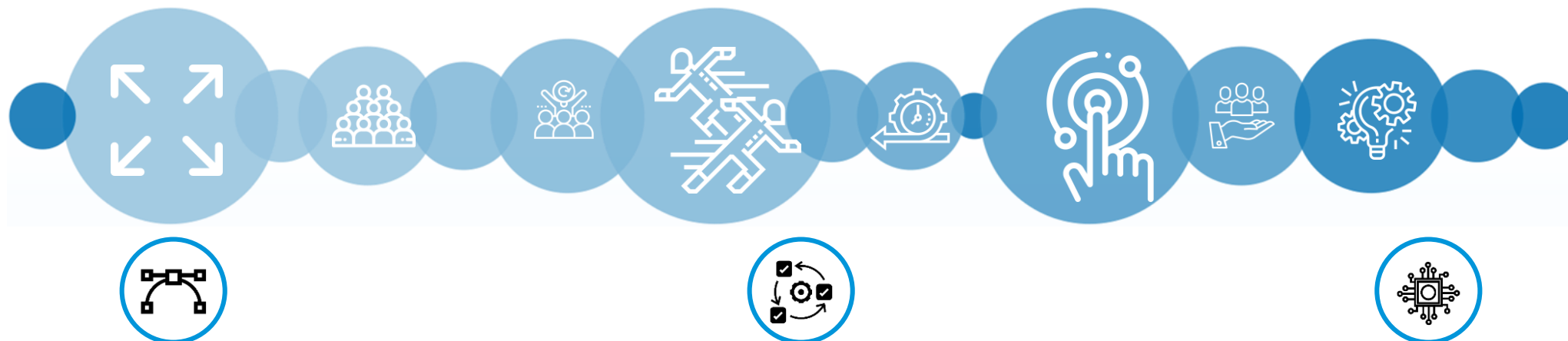
Processes and tooling

- **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

- ~**437,000*** 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 Quess Corp

Quess Corp Limited (Quess) 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, Quess 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.

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