

March 29, 2022

To,
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: Analyst Meet Presentation

This is in continuation to our letter dated March 17, 2022 intimating about the schedule of the annual analyst meet on March 29, 2022. Pursuant to Regulation 30(6) of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 please find attached the presentation to be made at the analyst meet today.

The aforesaid presentation will also be available on the Company's website <https://www.quesscorp.com/investor-other-information/>

Kindly take the same on record.

Yours sincerely,
For Quess Corp Limited

Kundan K Lal
Company Secretary & Compliance Officer

Quess Corp Limited

Quess House, 3/3/2, Bellandur Gate, Sarjapur Road, Bengaluru-560103, Karnataka, India
Tel: +91 80 6105 6001 | connect@quesscorp.com | CIN No.L74140KA2007PLC043909

www.quesscorp.com



Winning Together

Investors Meet 2022

March 29, 2022

Agenda

- Opening remarks
- Workforce Management
- Global Technology Services
- Product-led Platforms
- Operating Asset Management
- Closing remarks
- Q&A Session

Opening remarks

Guruprasad Srinivasan
ED and CEO



Our Purpose

To build a **leading institution** that drives **productivity** for our clients by **outsourcing and optimizing** their key **business processes**, and to be the **preferred firm** for employees, customers and investors alike.

What we want to be...

Today

FY25



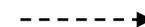
#6 Business services employer in the world by Headcount



#3 Business services employer in the world by Headcount



Ranked 48th largest Global Staffing Firm



Top 25 Global Staffing Firm



Women constitute 28% of core workforce



Women constitute **50%** of core workforce



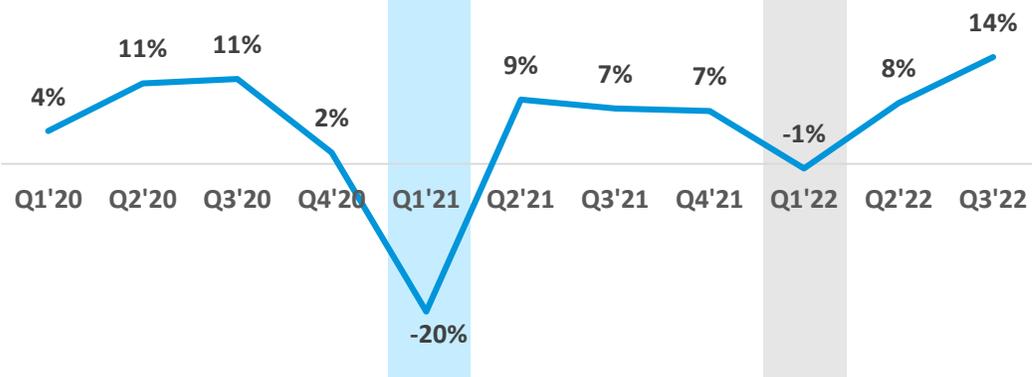
Market leader position across most Business lines



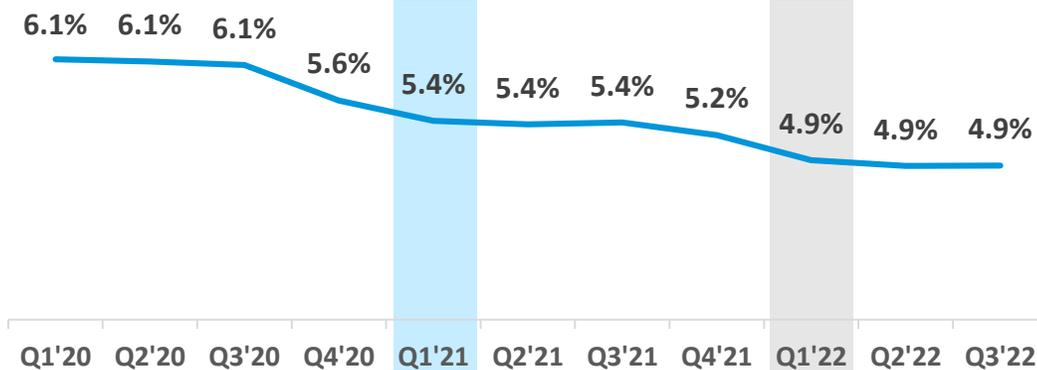
Must be **top 3** in every business line

How we handled the pandemic...

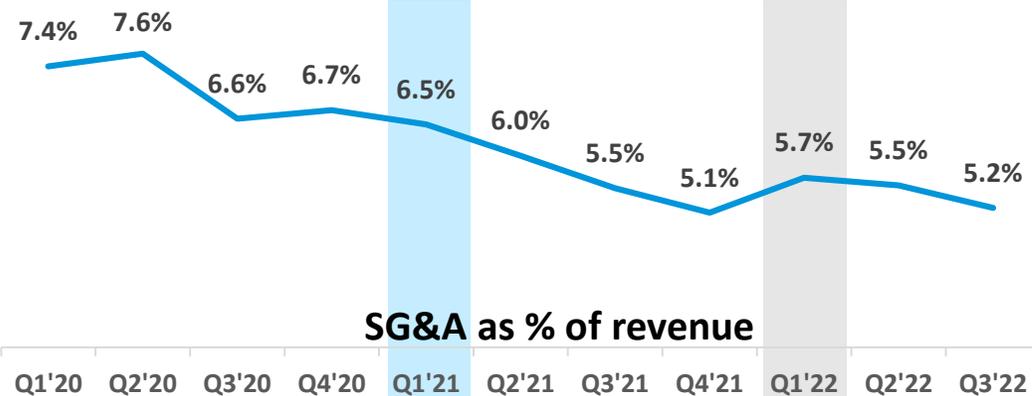
Revenue growth back to pre-COVID levels



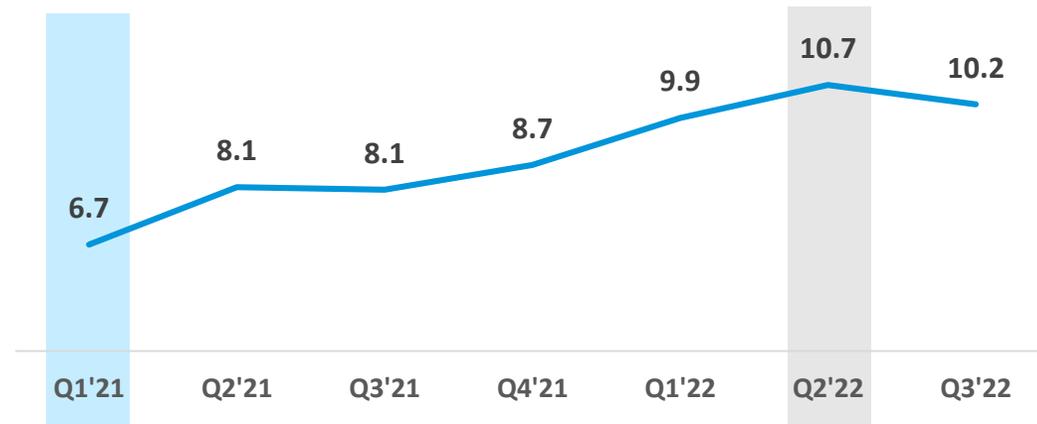
EBITDA Margin Stabilized



SG&A supported by productivity and efficiency



Absolute IT Spend (INR Cr)



Revenue growth has picked up to pre-covid levels, while the focus on technology has yielded back office efficiencies

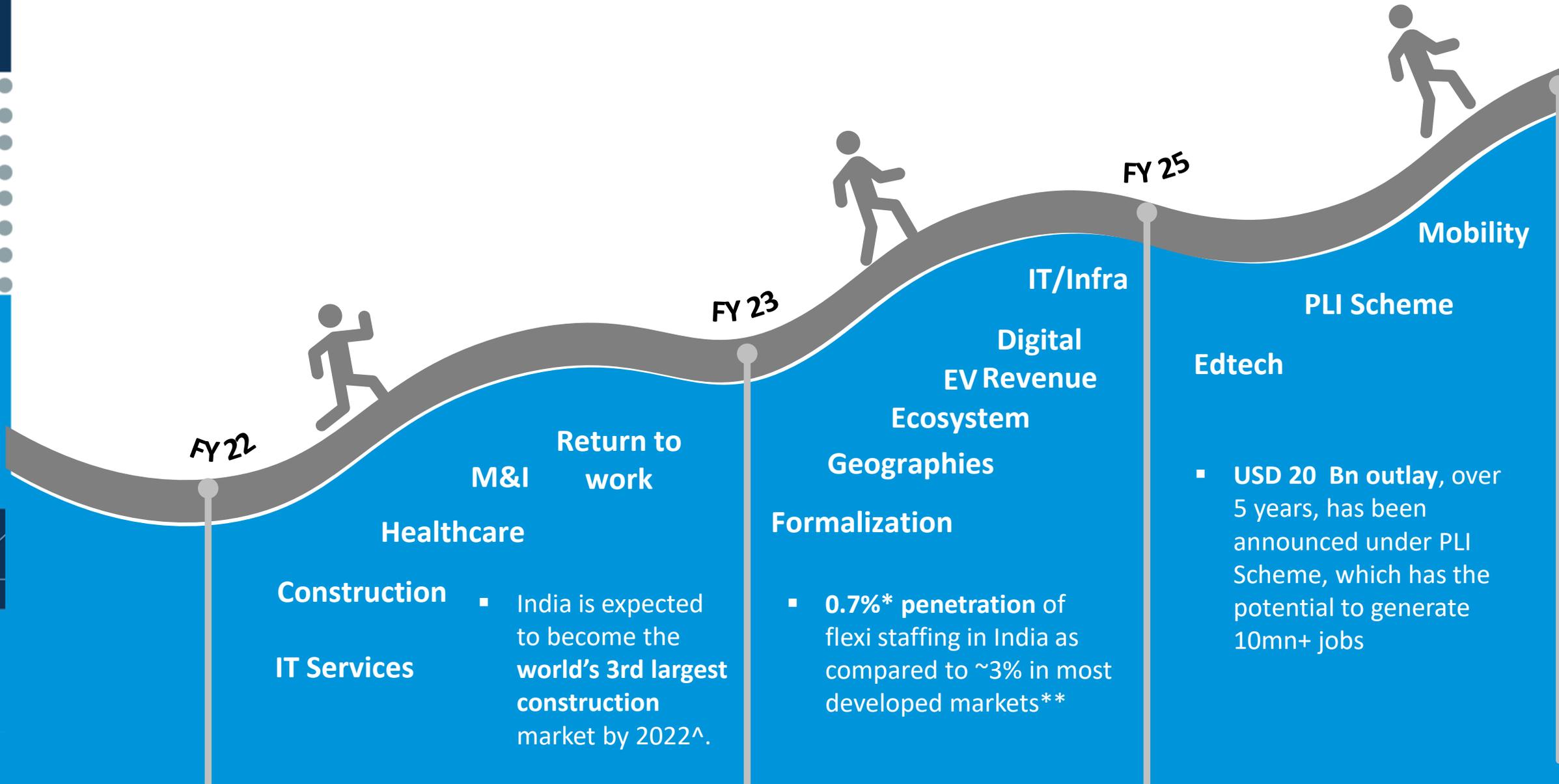
Covid-19 wave 1

Covid-19 wave 2

Wins during the year – FY22

- **Highest ever** reported PBT - Q3
 - ConneQt **crossed Rs 100cr** in monthly revenue
 - **QITS, ME, QRS, Philippines** – Accelerated growth (**> 50%**)
 - Cross-sell initiative yielded 70 wins and over **Rs 500 cr** ACV
 - Acceleration of **Qjobs – Hyper-scaling: Now adding 500k users per month**
 - **Stabilized debt level** despite funding growth
 - DSO maintained at **55 days**
 - **First Dividend** Payout
- 

Growth Drivers

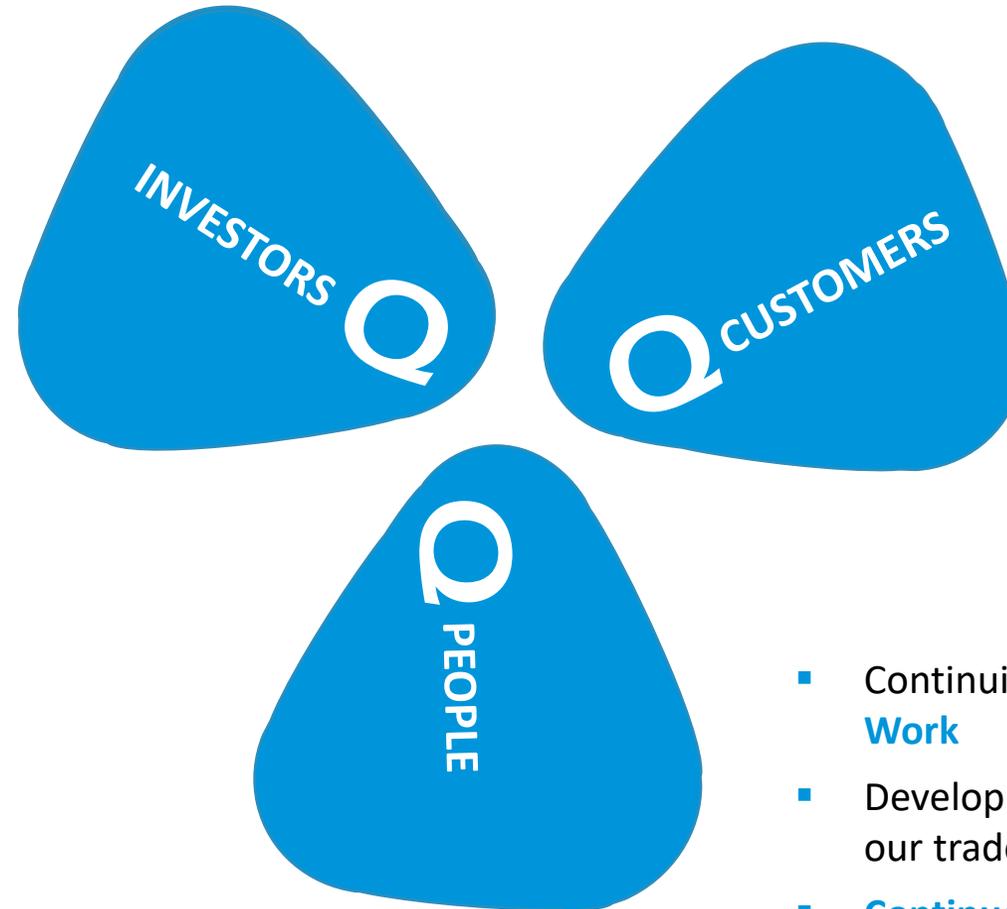


* Source: Indian Staffing Federation, 2019

** Source: World Employment Confederation ^ IBEF

We have made significant progress on the Three Pillars

- Achieving and sustaining **20% RoE**
- Delivering **20% CAGR on OCF**
- Enhancing investor value through **judicious capital allocation**

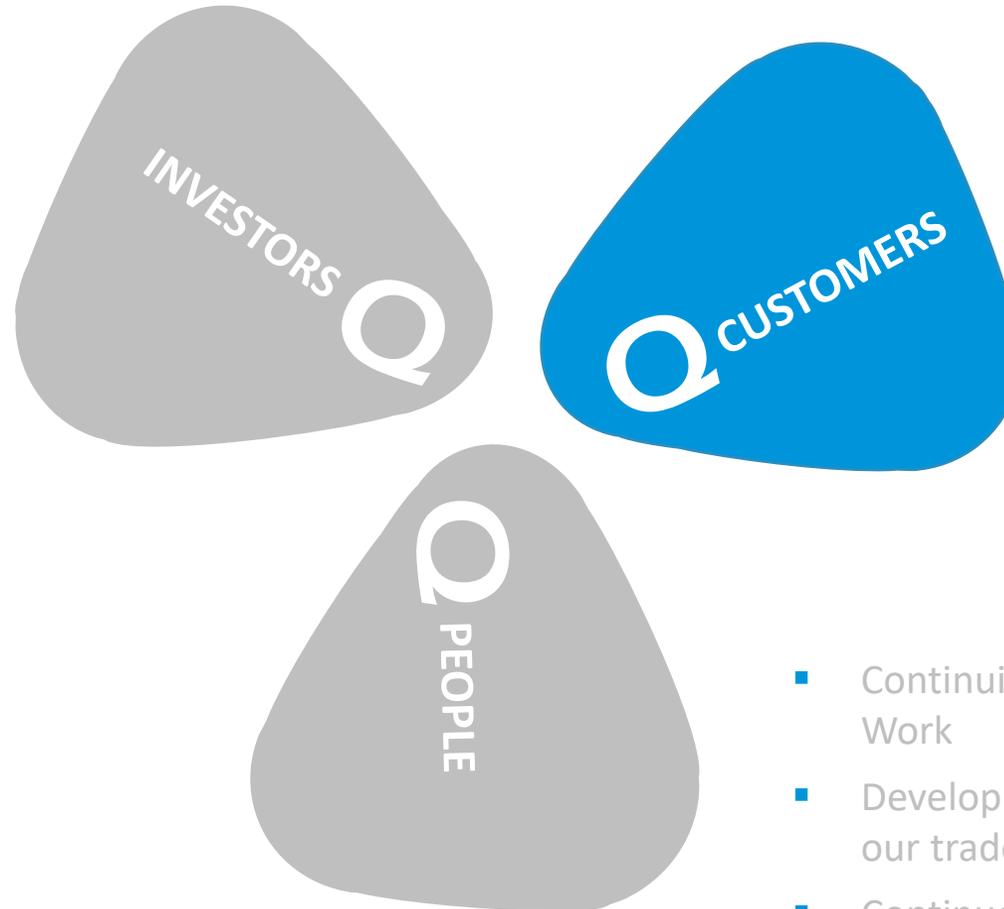


- Leveraging **technology** to become **extensions** of our customers' operations
- **Innovating** our services to meet customer needs
- Helping our customers enjoy greater **productivity**, enhanced **flexibility** and lower **costs**

- Continuing to be a **Great Place To Work**
- Developing **leading practitioners** of our trade
- **Continuously learning**, to drive performance

Winning Together: We have made significant progress on the Three Pillars

- Achieving and sustaining 20% RoE
- Delivering 20% CAGR on OCF
- Enhancing investor value through judicious capital allocation

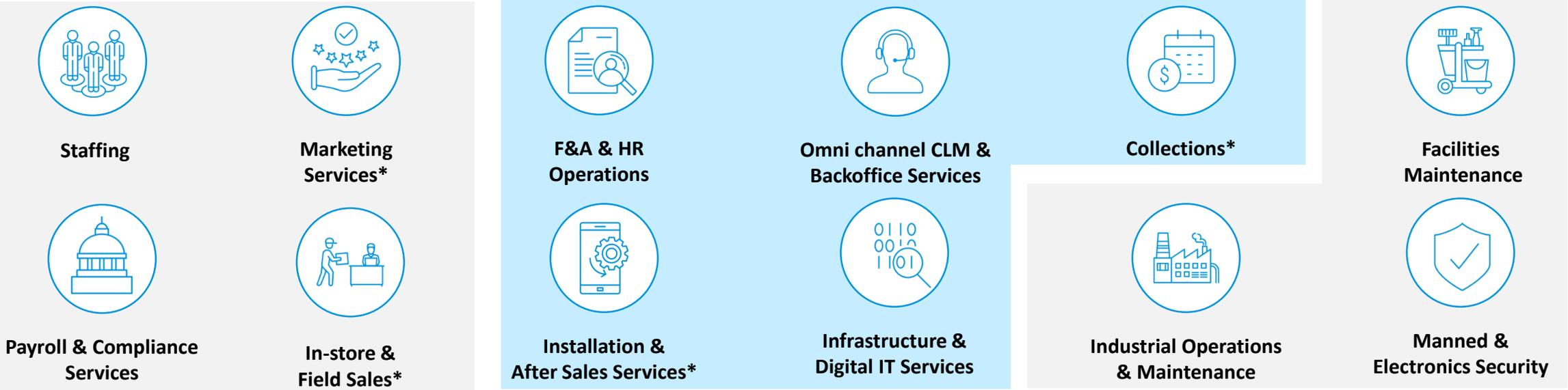


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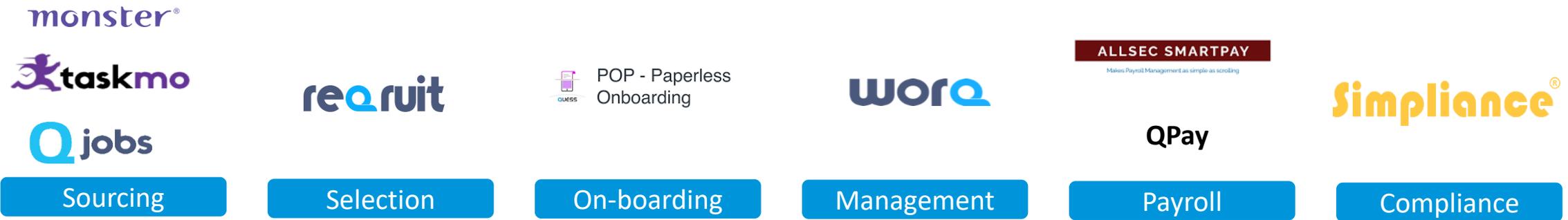
- Continuing to be a Great Place To Work
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Winning Together: Customers

We source over 20,000 associates every month to provide complete employment solutions to our customers



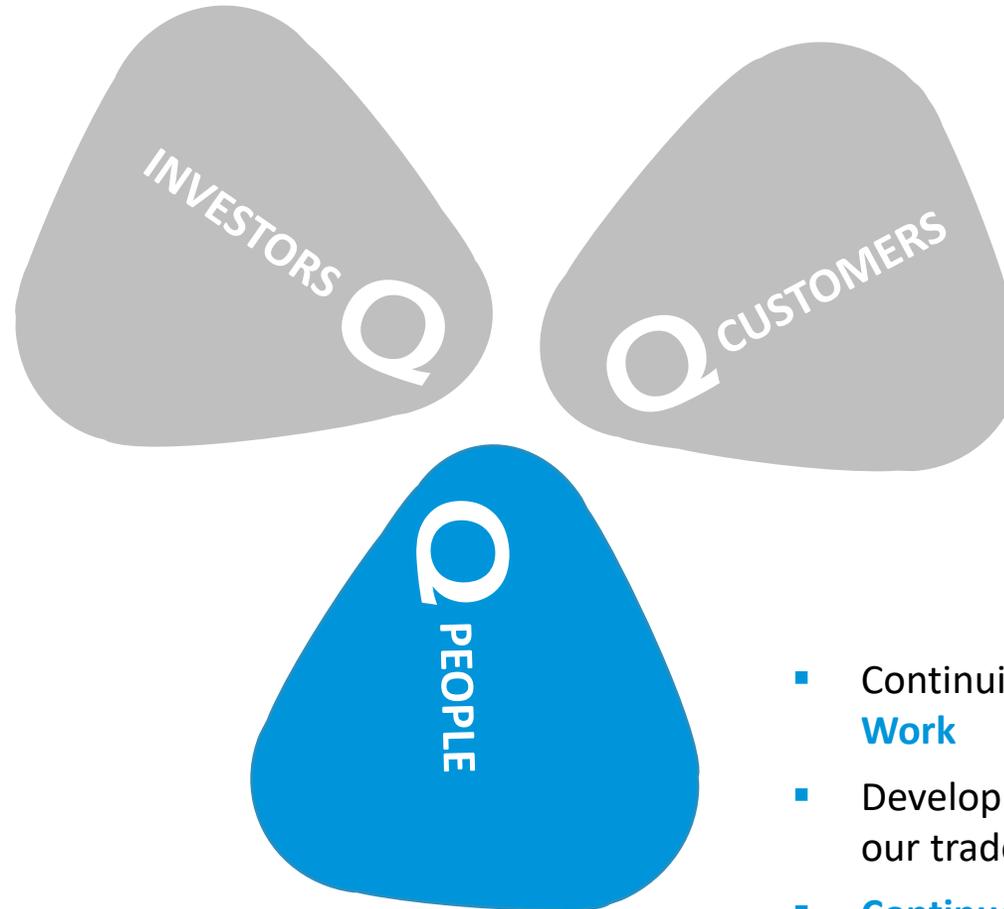
Backed by Digital ecosystem across the hire-to-retain value chain



* Includes Gig based workforce

Winning Together: We have made significant progress on the Three Pillars

- Achieving and sustaining 20% RoE
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- Leveraging technology to become extensions of our customers' operations
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- Continuing to be a **Great Place To Work**
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Winning Together: People

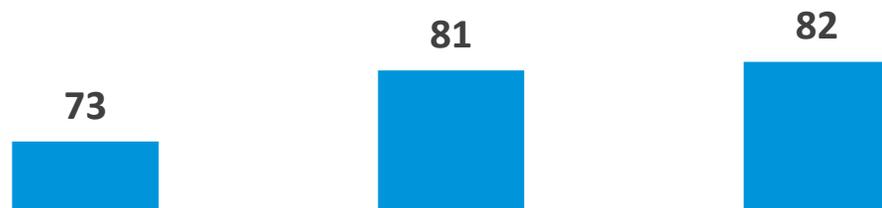
DASH – Our employee benefits platform



- Currently 1.5 lacs MAU with 80% repeat users
- 200+ products from 70+ partners
- 12 categories of benefits
- Dash helps to increase Employee's salary by 3%
- Leverage group buying to negotiate exclusive discounts with each partner

Continuously improved score in GPTW survey

Trust Index Score



2019

2020

2021

50%

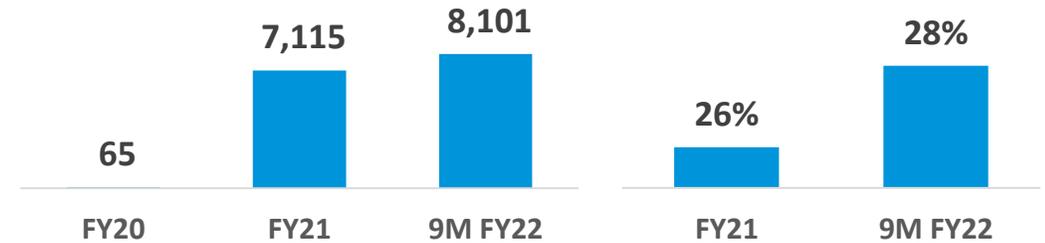
70%

72%

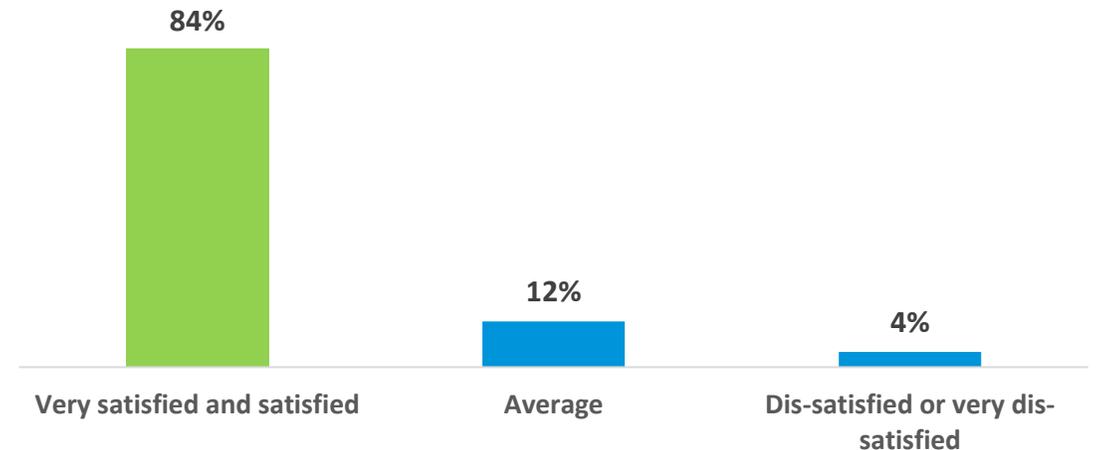
% Response Rate

Equal opportunity employer

Onboarding Differently Aabled People % Employee Women

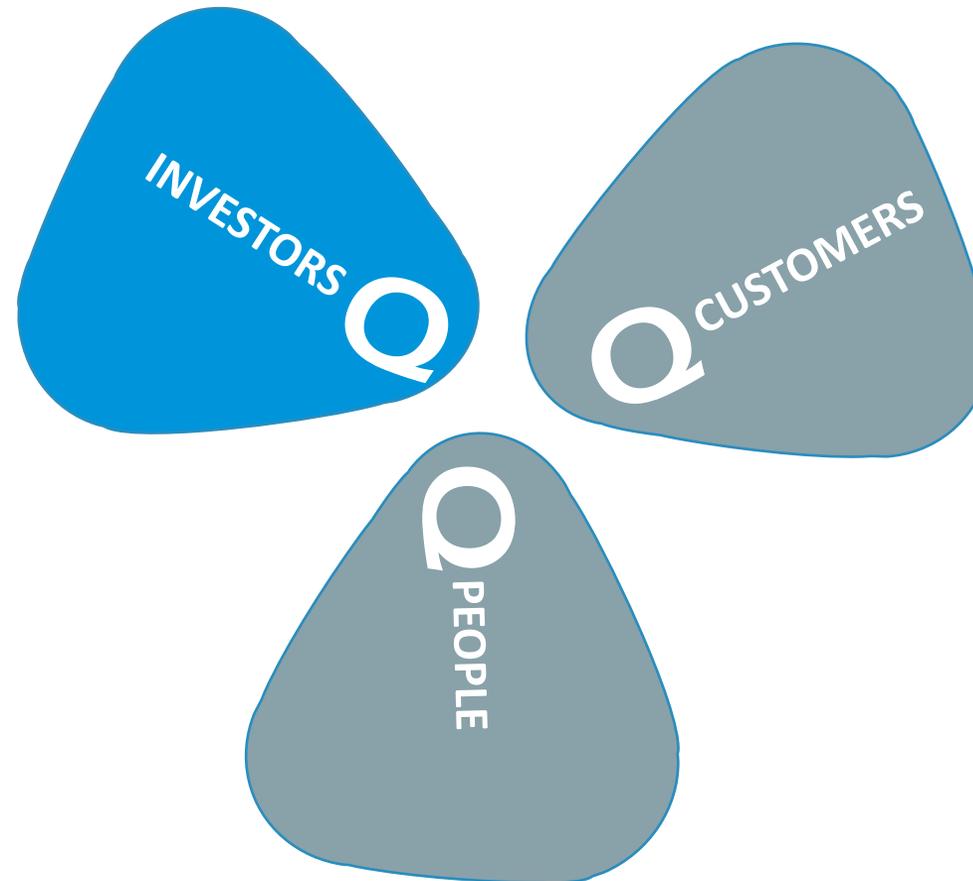


Stellar NPS in first ever large scale associate survey



Winning Together: We have made significant progress on the Three Pillars

- Achieving and sustaining **20% RoE**
- Delivering **20% CAGR on OCF**
- Enhancing investor value through **judicious capital allocation**

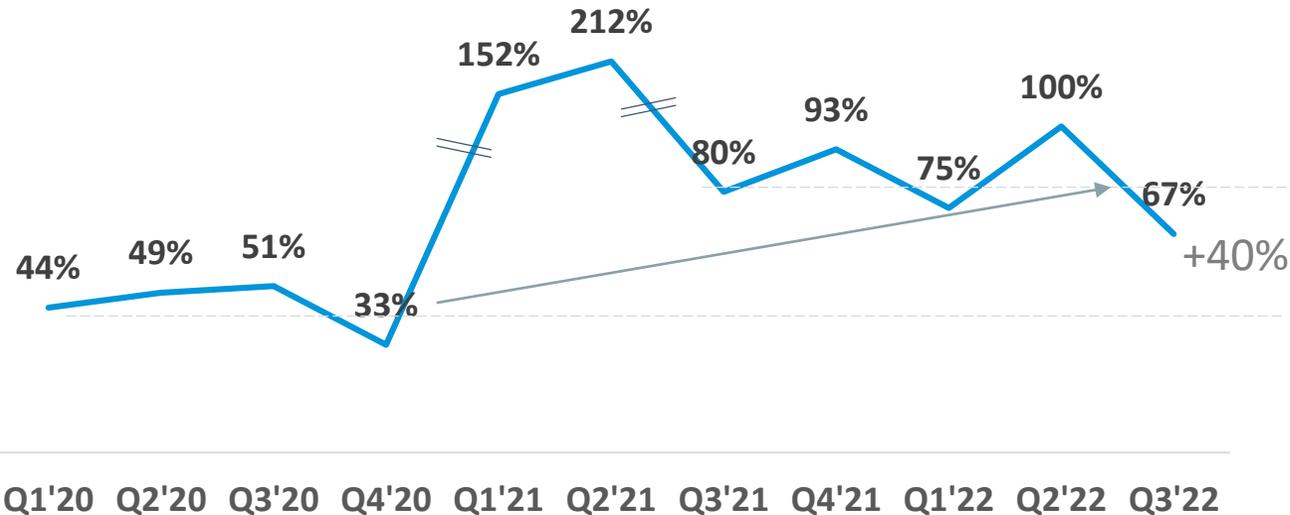


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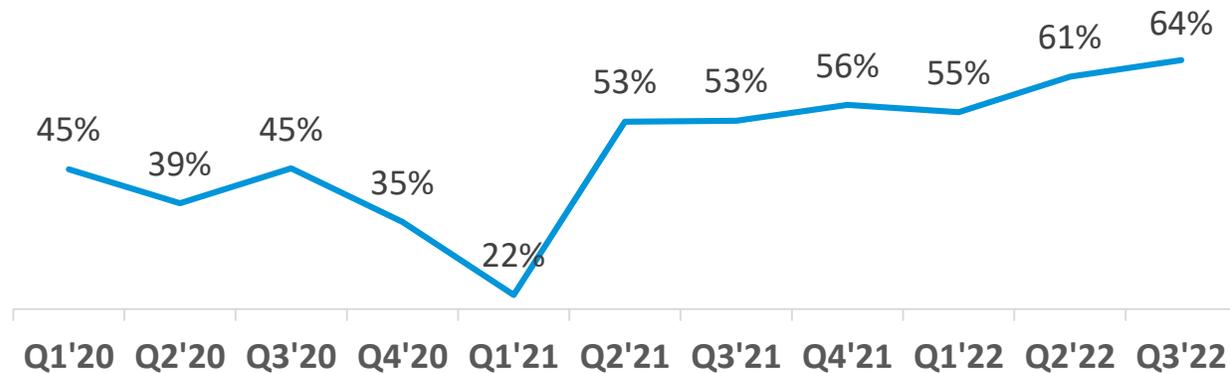
- Continuing to be a **Great Place To Work**
- Developing **leading practitioners** of our trade
- **Continuously learning**, to drive performance

Winning Together: Investors

OCF / EBITDA has structurally gone up



EBITDA to PBT Conversion



- Consolidation of following entities is underway:
 - MFX India
 - Greenpiece
 - ConneQt Business Solutions
- Total dividend payout of **INR 162cr** in FY22
- On track to achieve 20% RoE

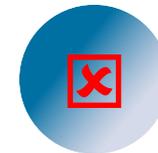
Our Business Guidelines



Path to **25% RoE**
20% OCF CAGR



Cultural Fit



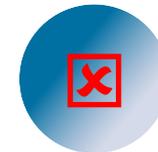
Businesses with **high Govt. policy risk**



Path to **\$ 200mn EBITDA**



Digitally driven Leadership



Asset heavy



Tech Intensity



ESG driven



Business with **long gestation projects**

Why do we have a clear and compelling investment case?

1

THE BREADTH OF
OUR BUSINESS
MODEL ACROSS
GEOGRAPHIES,
SECTORS &
CONTRACT TYPES

2

OUR EXPOSURE TO
FASTEST GROWING
ECONOMIES IN THE
WORLD

3

OUR SUPERIOR
EXECUTION
CAPABILITIES
ACROSS
UNMATCHED
RANGE OF SERVICES

4

SIGNIFICANT
CASHFLOW
GENERATION &
CLEAR CAPITAL
ALLOCATION
GUIDELINES

Workforce Management

Lohit Bhatia
President

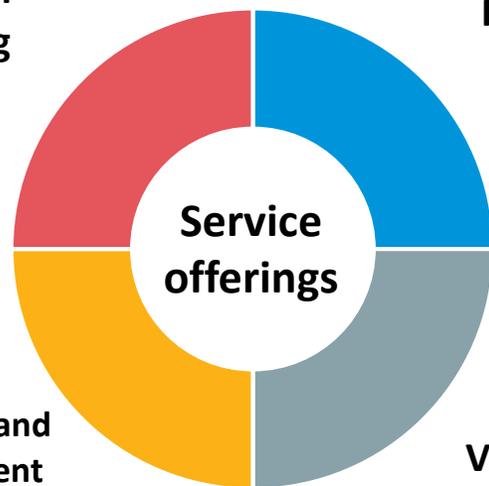
Quess WFM: Bird's eye view

- India
- Sri-Lanka
- UAE
- South East Asia

- India
- Singapore

General Staffing

Professional Staffing



Selection and Recruitment

Value Added Services

- RPO
- Selection

- Master Service Provider
- Managed Services

Highlights



273 K+ Associates



48th Largest Global Staffing Company by Value



10k+ Professional Staffing HC deployed



6.4K Associates deployed in ME and APAC

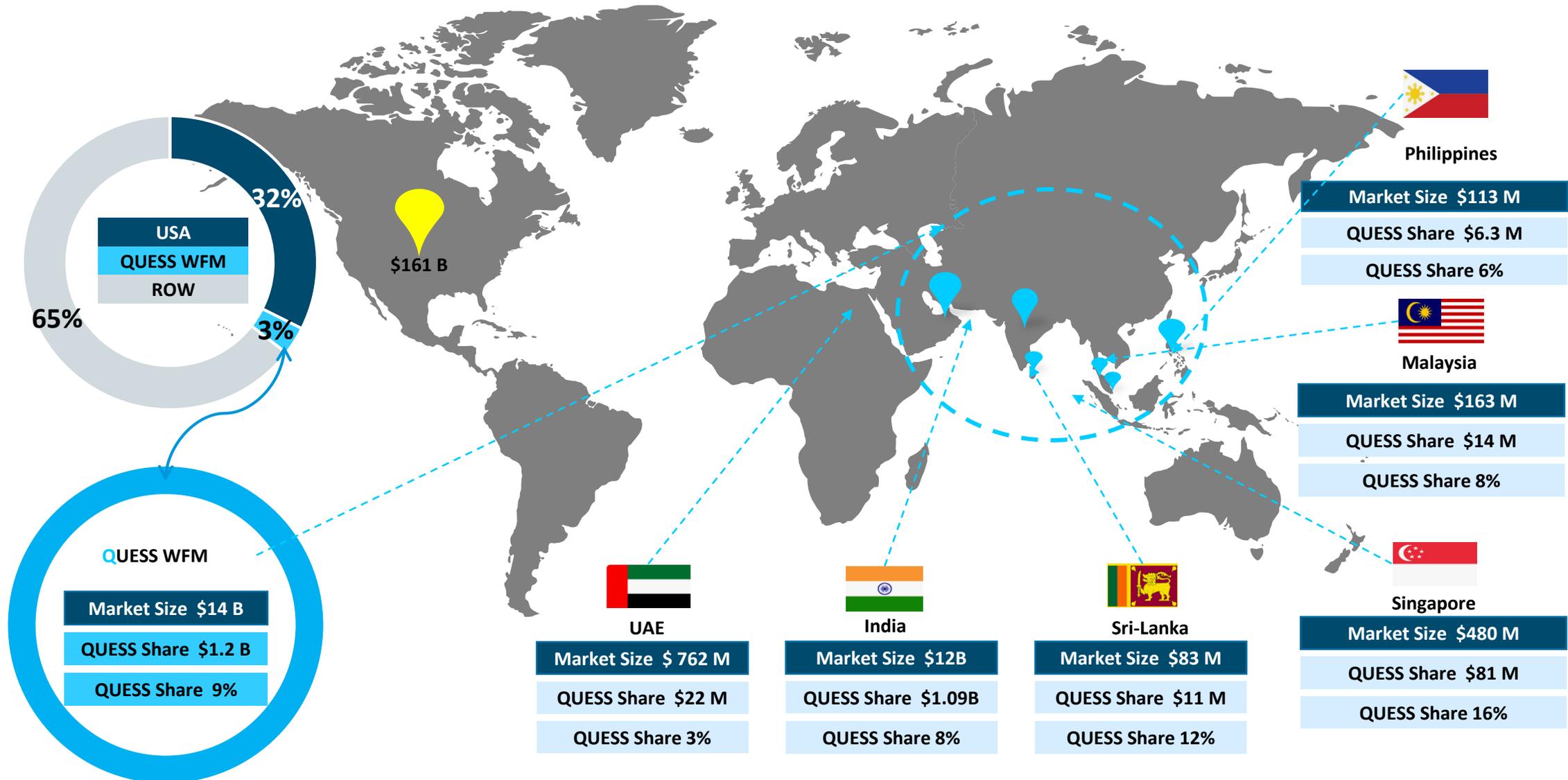


Over 1,500 clients



4,800 taskers active on gig platform

Global Staffing Market Size is \$ 497 B



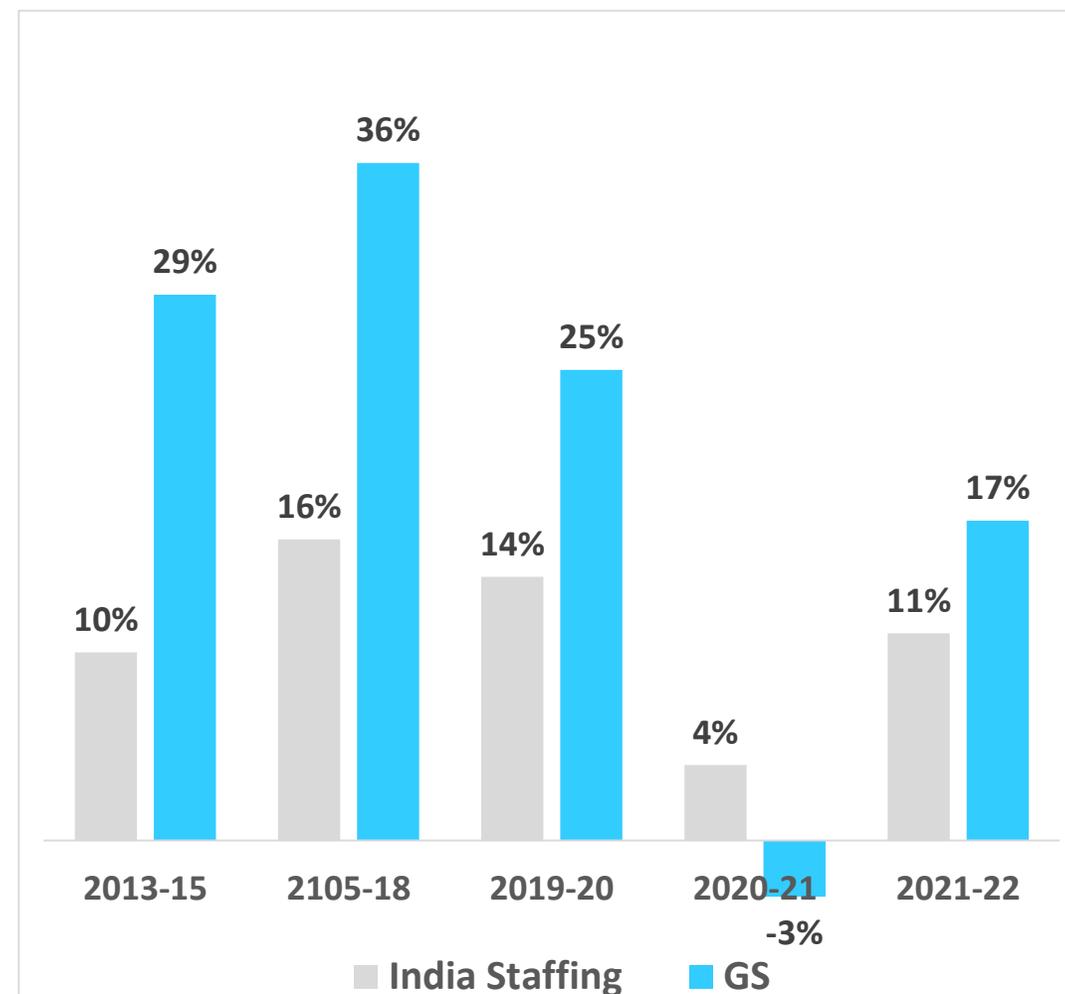
We have continued to outperform global benchmarks...

Global Peers



	1	2	3	4	5
Revenue (USD)	23 B	27 B	21 B	5.3 B	1.24 B
CAGR	5%	5%	4%	2%	23%
EBITDA Margin	4.6%	4.4%	3.2%	2.0%	3.14%
EBITDA/GM	22%	22.4%	20%	13%	60%
HC	2Mn +	700k +	600k +	370k +	273k +

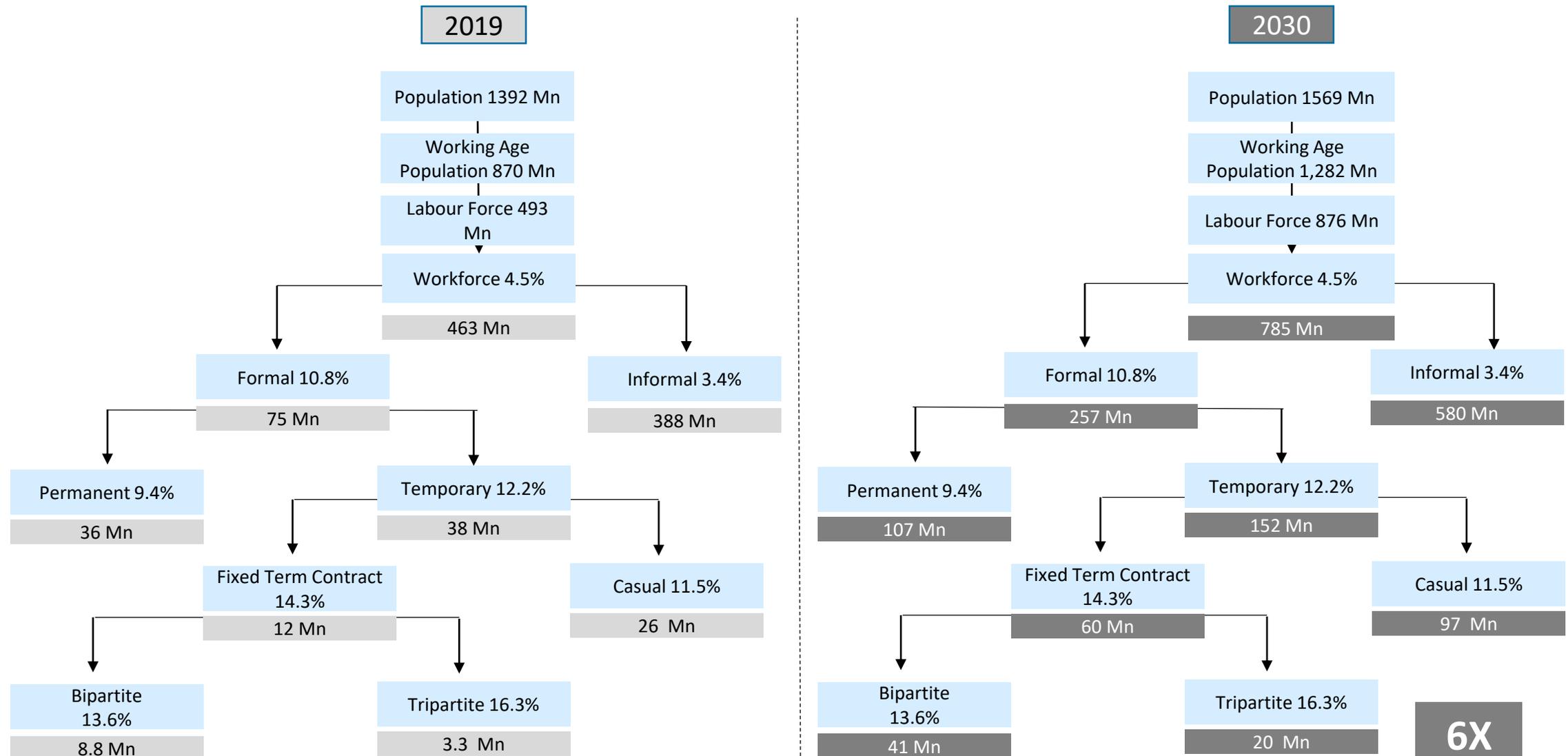
HC Growth



...by making significant progress across verticals and geographies

	FY 19-20		FY 21-22		
	General Staffing	IT Staffing & APAC	General Staffing	IT Staffing & APAC	IT Staffing APAC,QRS
 Associate HC	243,948	15,007	273,110	14,589	14,589
 Revenue PAPM	21,066	78,703	23,366	98,168	101,346
 GM PAPM	690	9,822	683	12,979	15,225
 Associate to Core	330:1	19:1	424:1	18:1	18:1
 Clients	987	356	1,154	381	415

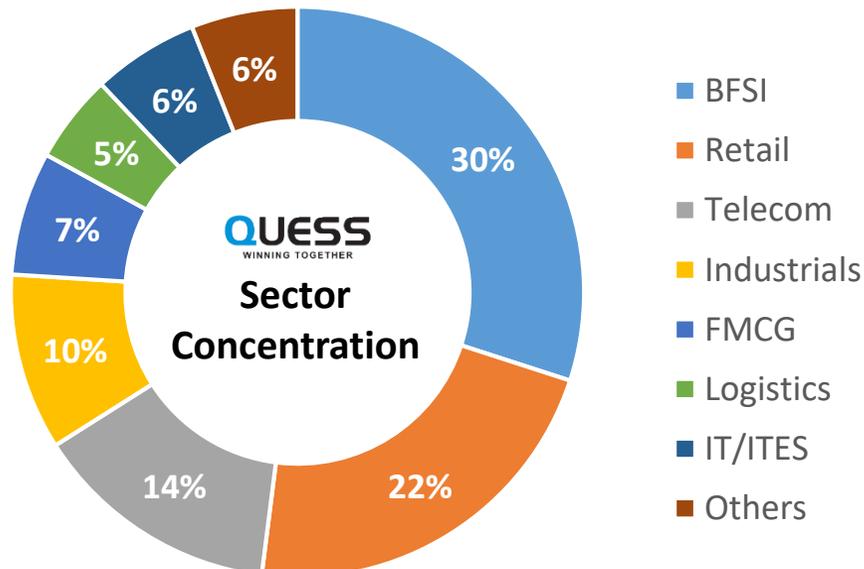
Temp Staffing Opportunity Decade Ahead



Indian Staffing Market: Two-pronged focus to drive future growth

PLFS Survey Findings (Figures in million)

Sector	Total Workforce Employed	Regular Wage	Casual Labor
Mining	1.5	0.9	0.5
Electricity	3.5	2.7	0.3
Manufacturing	62.4	27.9	7.6
Construction	62.2	3.4	51.8
Trade, hotel and restaurants	74.7	24.7	5.6
Transport	31.5	13.2	3.6
Other Services	67.1	50.1	1.7



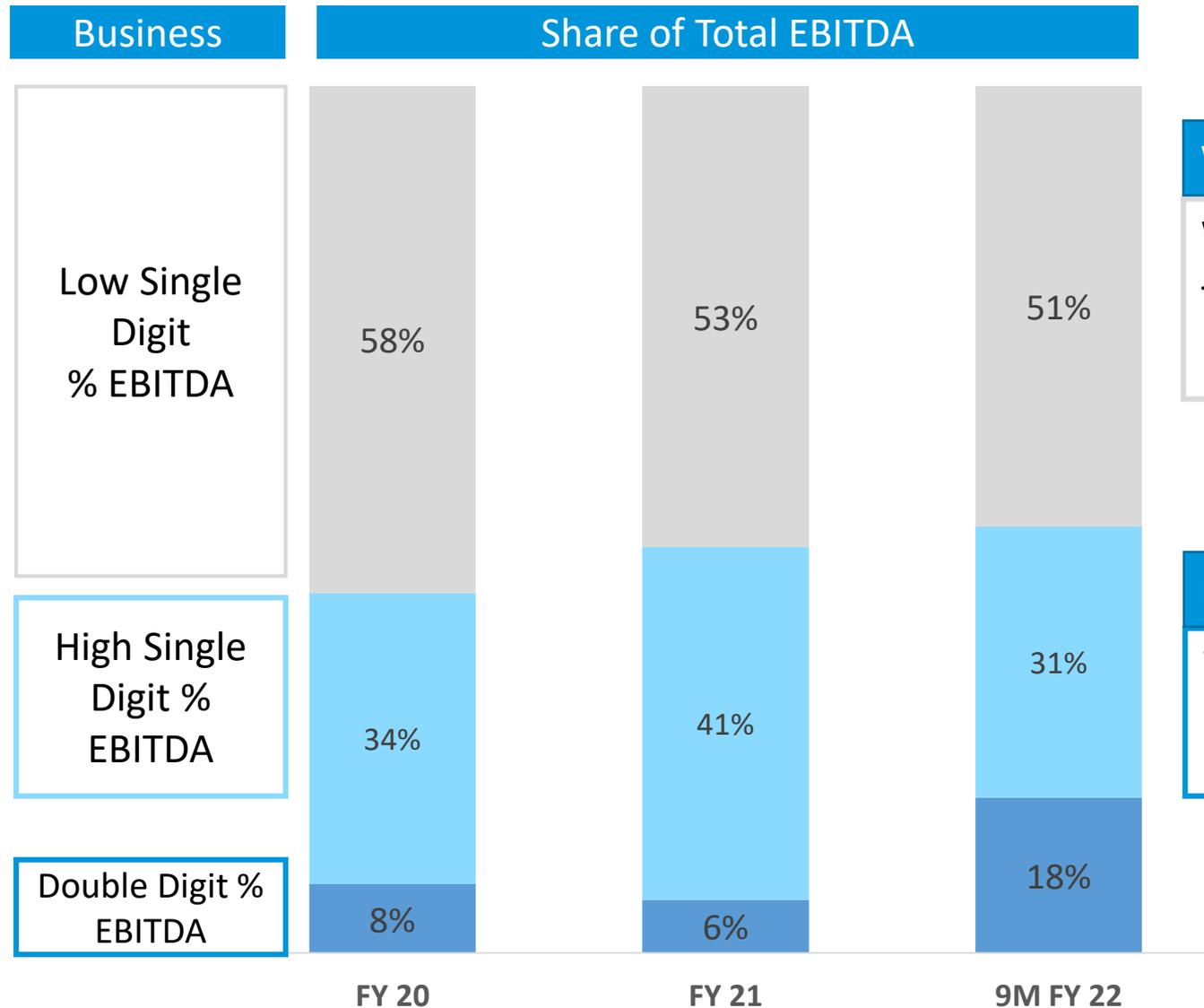
Focused effort to capture untapped segments:

- Manufacturing and Construction poses the largest untapped opportunity in for staffing business
- Initiatives taken to tap the opportunity:
 - Construction: 3,000 workmen deployed. Site Based training to improve productivity of fresh workmen.
 - Sampoorna Rozgar Yojna

Increase the wallet share in existing segments:

- Core growth to come from BFSI, Retail, IT / ITeS
- Enhanced growth from new segments like e-commerce, and Start-ups
- WFM: New accounts sales to drive incremental HC growth (~50% in Q3 FY22)

Margin mix of WFM



While the Volume Verticals

Will continue to provide growth and form the backbone of Workforce Management

Focus on Value Verticals

Will drive the margin expansion

Digitally enabled services driving higher productivity and leading to deeper customer relationships

Front End Process

85% of Associates are using WorQ Application for

- Task Management
- Attendance Capturing
- Sales Modules
- Administering Instant Surveys
- Route Management
- Digital Supervisor

Back End Process

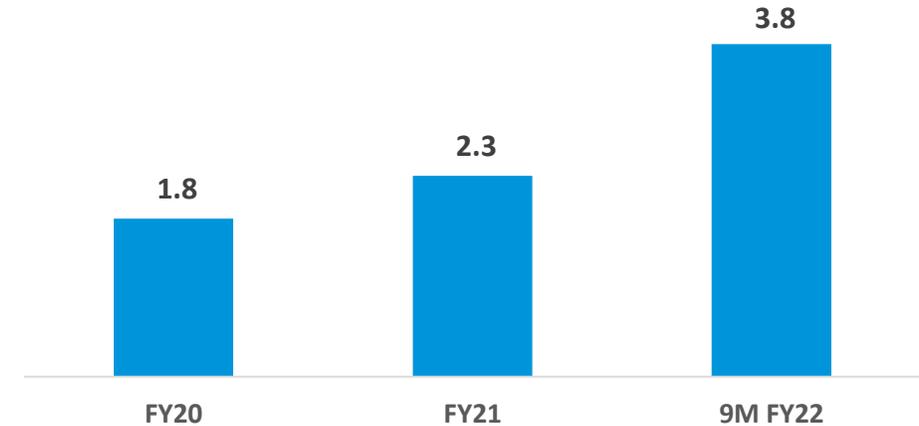
Sourcing

- Cost to hire down by 50%
- Recruiter Productivity improved by 2x

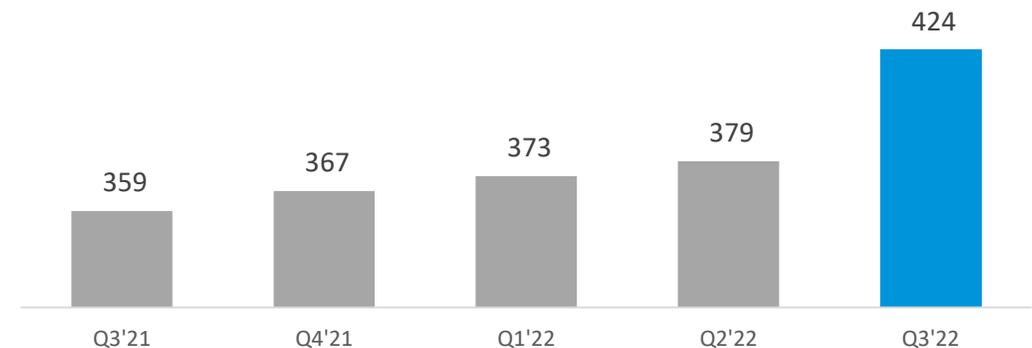
Onboarding

- 29,000+ Associates are on-boarded (POP) every month
- Speed of on-boarding improved by 42%

WorQ GM (INR Cr.)



Associate to Core Ratio



WFM: Focus Areas

General Staffing

- Use technology in all areas. 50% of the sourcing to be through alternate channels
- Increase the VAS share of total GM
- No 1 with associates with satisfaction levels above 90%
- Grow the Construction and M&I Vertical

IT Staffing India and Recruitment

- **QITS-** Captives , managed services , new age platform based hiring
- **Recruitment** – Digital Search, Functional RPO, Hire Train and Deploy

IT Staffing Singapore

- New client addition expands from 10% to 20%
- New Service Lines: General Staffing and Permanent Recruitment

APAC and ME

- Center Of Excellence being set up in Philippines for creating recruiting capacity across APAC
- Focusing on industry diversification – FMCG, Insurance, Agro. & Manufacturing



Global Technology Solutions

Pinaki Kar
President

Quess GTS: Bird's eye view

- SaaS solution for Policy, Underwriting,
- Data Management spanning the P&C value chain across Carriers/MGAs/TPAs
- Payslip processing outsourcing

- Collections
- Back-office automation

Platform Business

Non-voice BPO

Service offerings

Customer Life-cycle Management

IT Services

- Voice based CLM
- Non-voice based CLM

- IT Consulting player in Canadian Government market
- Private Cloud based Platform Solution

Highlights



Over 40,000 billable employees



Payroll and IT Services debuted on the Everest Group PEAK Matrix



500 Mn+ customer connects / year



Over a million payslips processed per month



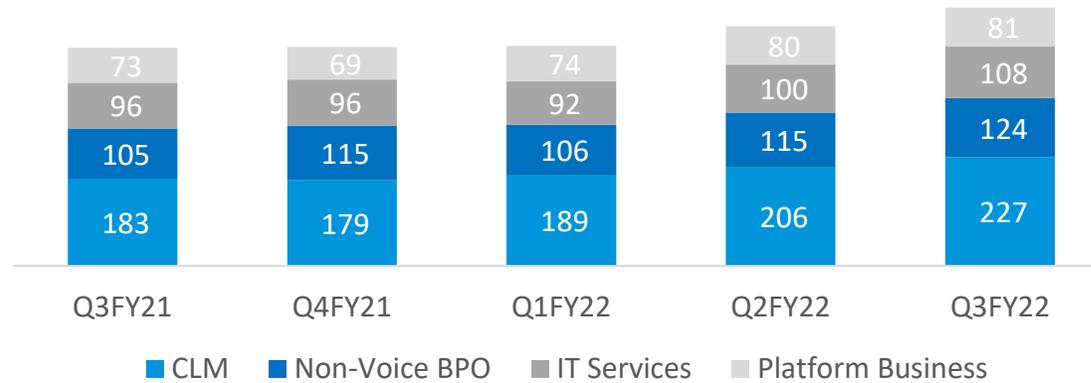
End-to-end collections covering **95%+** Indian pin codes



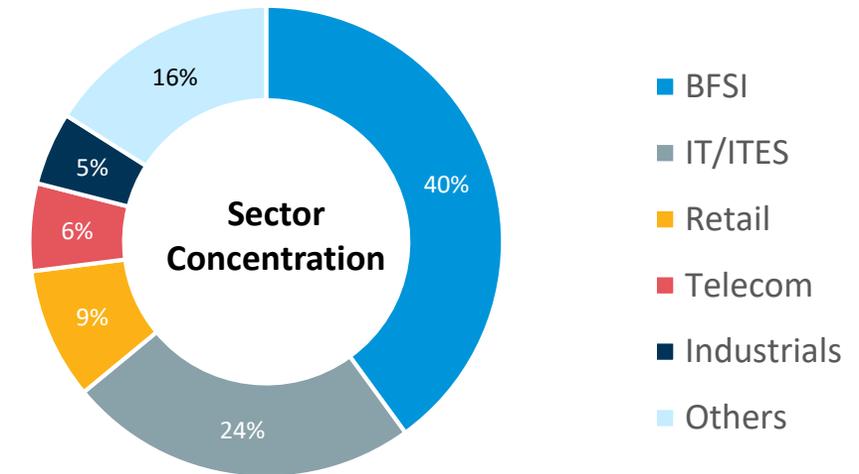
MFX: Gross underwritten premium **USD 3.3 Bn**

GTS: Customer insights

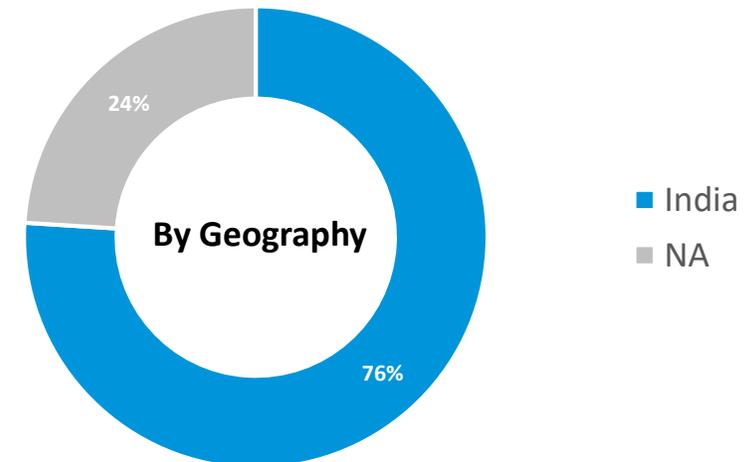
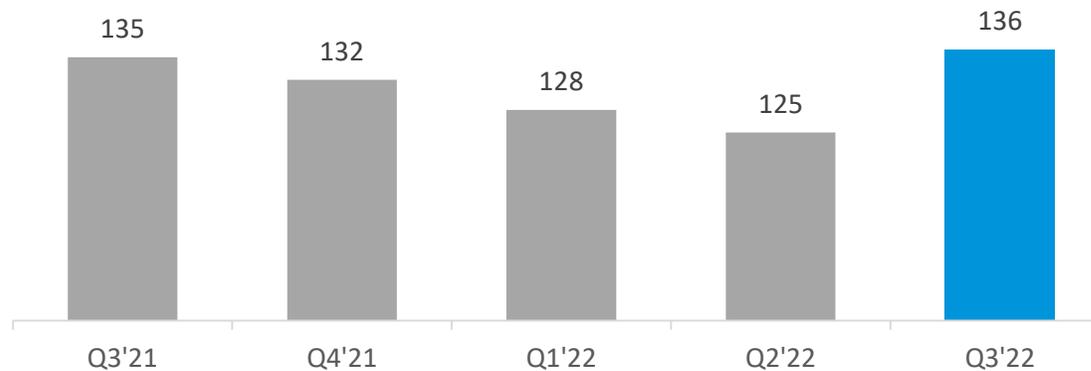
Revenue Distribution (Rs Cr)



Diversified Revenue Base

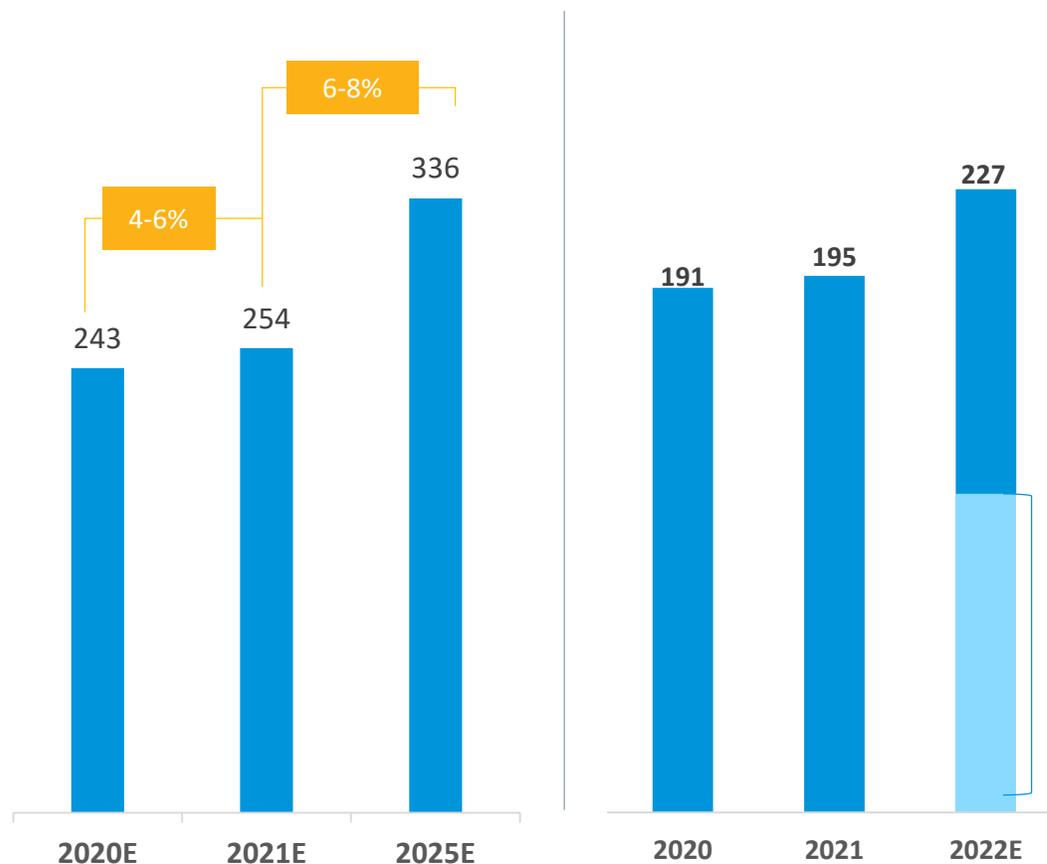


Revenue / Employee (Rs '000)



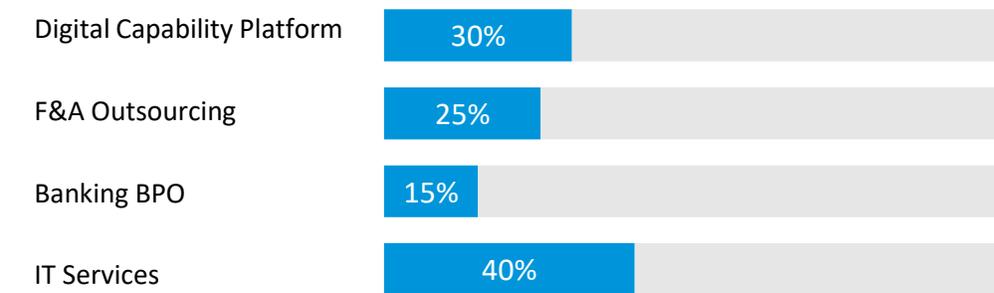
GTS: Market Potential

Global BPM Market Size (USD Bn) **India Technology Market Size (USD Bn)**

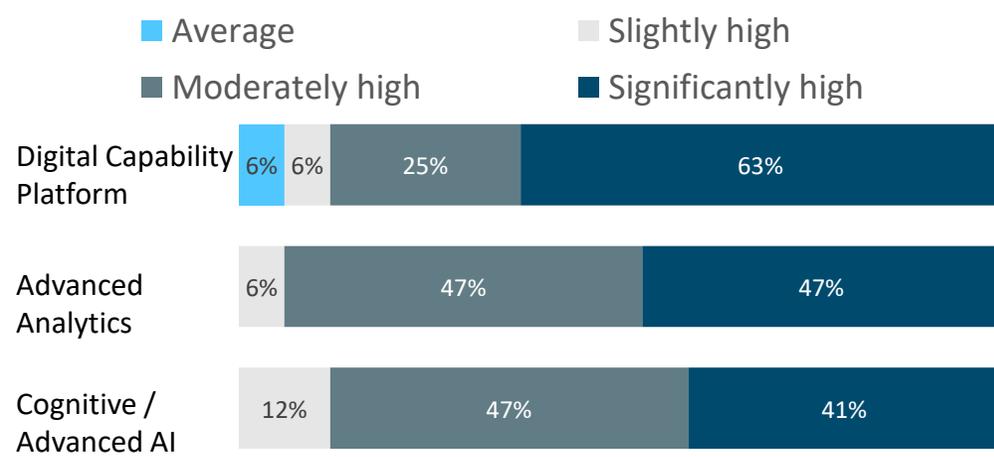


We have immense room to grow

Global presentation of sample market segments



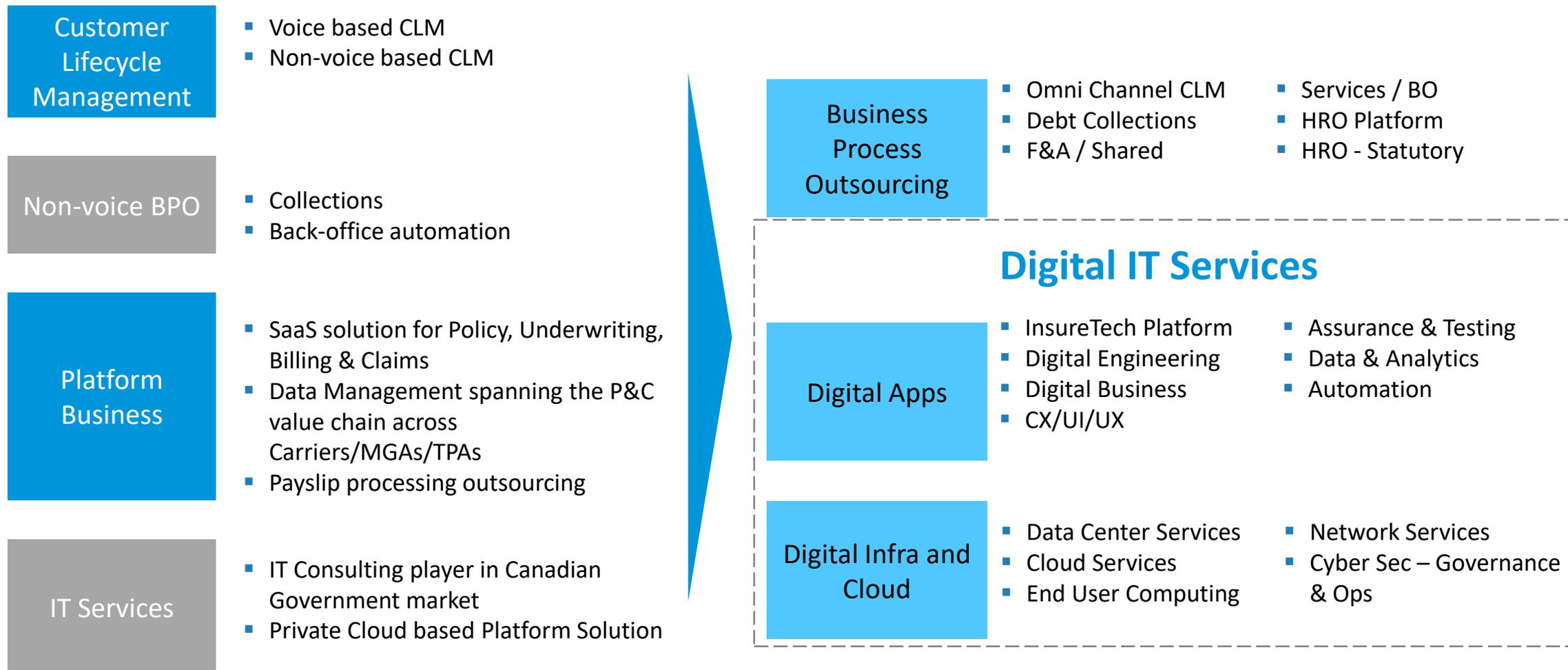
Level of importance of levers in BPM industry in the next five years (% BPM respondents)



Future focus to be on building digital capability

GTS: Way forward

- Continue to grow BPO business
- Create Digital IT Services business combining competencies across existing businesses



Focus areas

Business Process Outsourcing

- Premium-ization – F&A, Social ORM, digital marketing, platforms
- BPM – Focus on new geographies (US and Middle East)
- New Services: Digital BPM services
 - Social ORM
 - Digital marketing
 - Digital Collection
- Aggressive automation plan in Payroll for FY'23

Digital IT Services

- Reinforcement of proposition in Digital Business Apps BPM
- Assurance and Testing
- Data Center Services / End user computing
- Cyber Security
- Data Analytics and Automation
- Augmentation of skills

Cross Sell with existing Qess clients

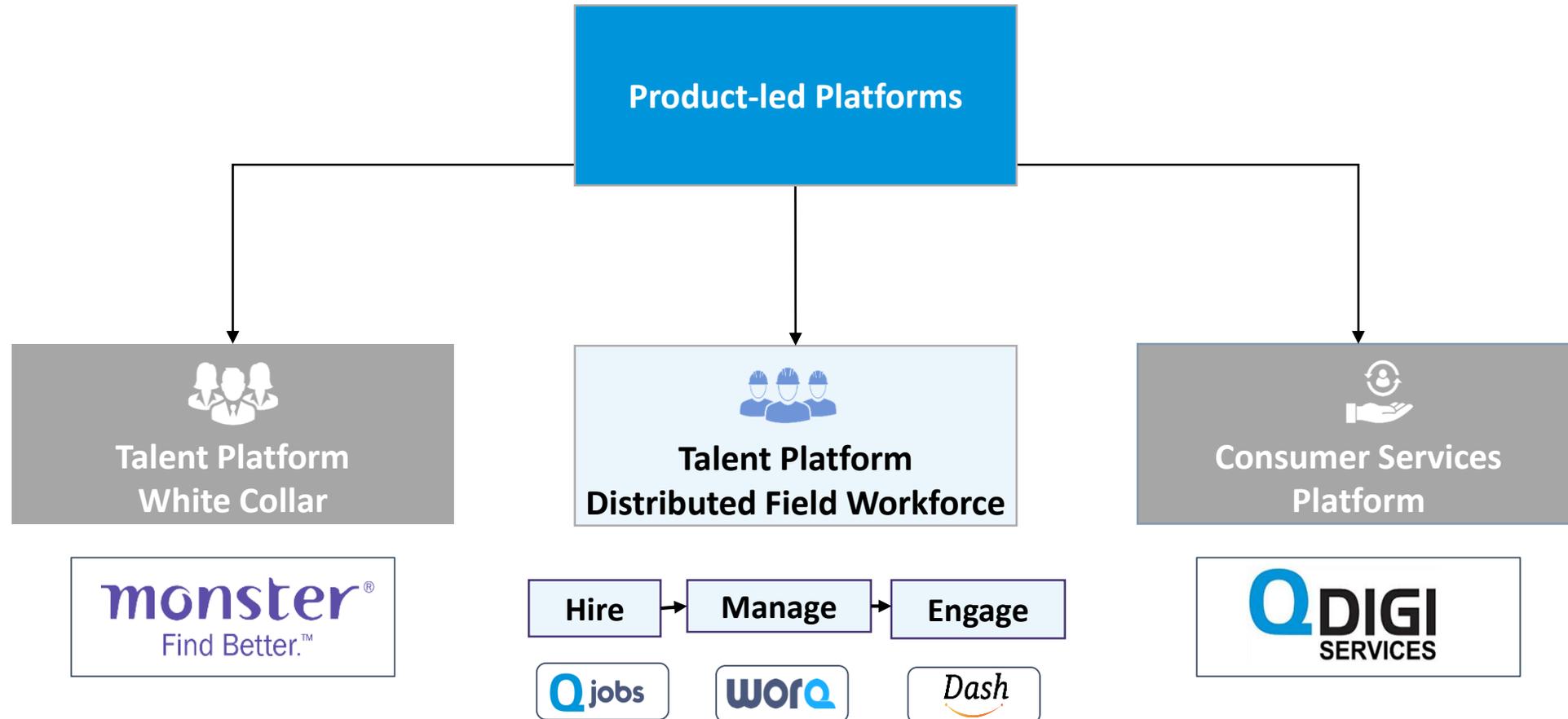


- Break -

Product-led Platforms

Sekhar Garisa
President

Quess Product-led Business: Bird's eye view



- **65M+** Seeker Base
- **550K+** Active Jobs
- **7500+** Customers

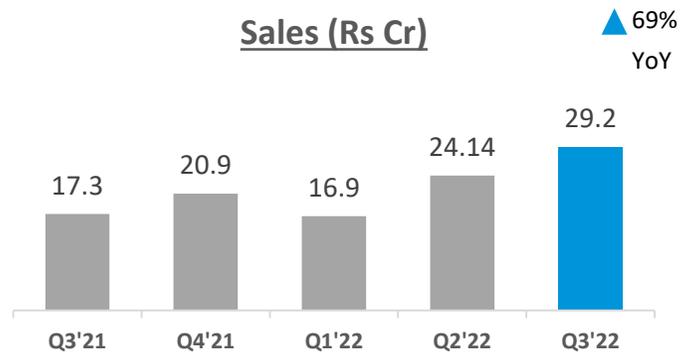
- Qjobs: **3M+** candidates, **1M +** Jobs, **5000+** Companies
- WorQ: **270k+** MAU
- DASH: **55 cr+** Annual GMV

- **150k+** monthly transactions
- **17400** Serviceable Pin Codes

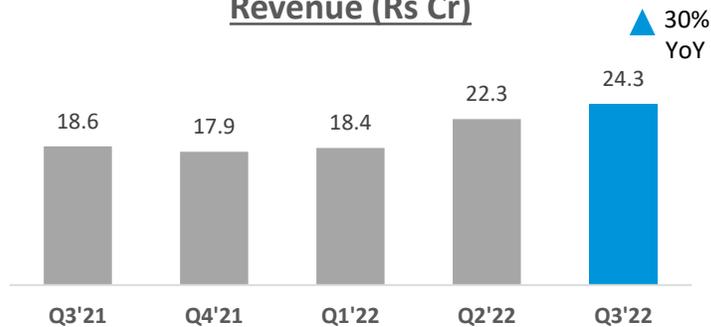
Monster : Reaping rewards for consistent performance

Financial Metrics

Sales (Rs Cr)

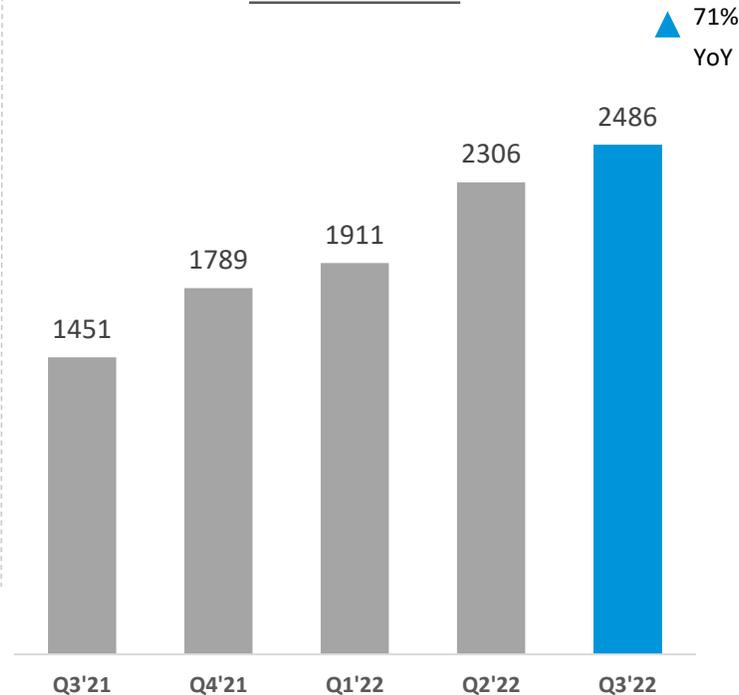


Revenue (Rs Cr)

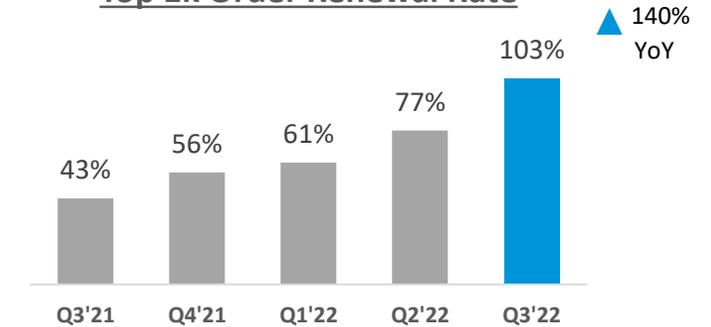


Operating Metrics

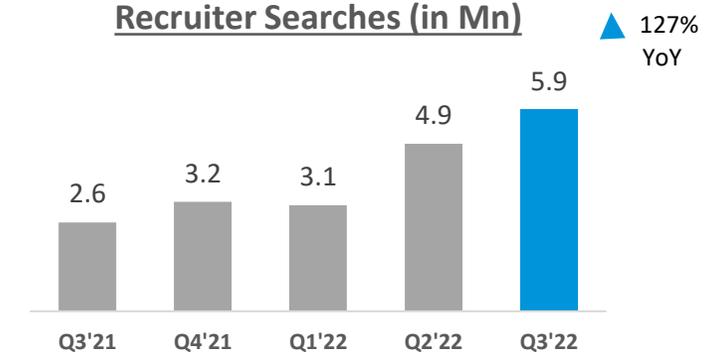
New Orders



Top 1k Order Renewal Rate



Recruiter Searches (in Mn)



Key developments:

- **INR 137.5 Cr** investment raised, led by Volrado Venture Partners, Meridian Investments and Qess Corp
- **122% YoY** Growth in # of Active jobs on the platform. There is a large focus on Job Quality with a new metric of **Job Quality score** introduced
- Customer retention rate constant at **~70% QoQ** with focus on larger customers helping achieve **103% value renewals**
- User Acquisition & Re-activation crossed **1.5 million** in the quarter

Talent Acquisition growing in complexity, but presents a huge opportunity



- Gen Z & Millennials looking for **frequent job changes, career advancement opportunities and work flexibility**
- Work from home/ Gig jobs seeing growth along with rising demand for technical talent
- Companies to spend 6x more on hiring technical talent, and replacement costs at 0.5x to 2x of salary cost



- 61% of recruiters expect future hiring processes to be a combination of virtual and in-person
- 58% of recruiters are now using social media like LinkedIn, Facebook etc. to connect with potential hires
- Growing use of Assessment – **47%** of Indian tech recruiters have started using **online assessment tools** for hiring

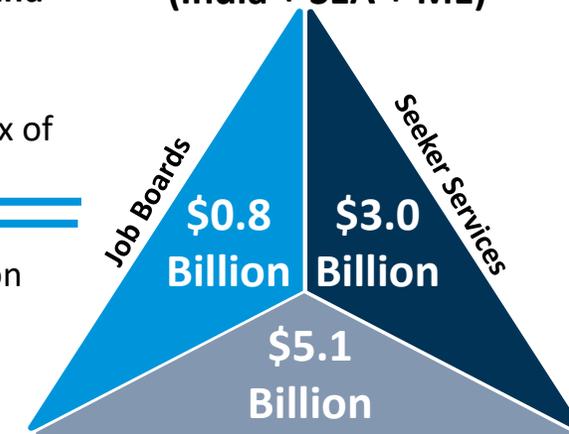


- **\$8.5 Bn of total funding raised** by Ed-tech start-ups in India, of which \$6.1 Bn funding has been raised since 2020, leading to pipeline stuffing of talent which will need employment outlet
- 50%+ India's workforce will need re-skilling to meet talent demands by 2022, indicating higher investment potential



- India has anomaly in job boards market with the largest player having 62% market share
- SEEK Asia (JobStreet & JobsDB), the largest jobs board player in SEA has 22% market share
- **Top 3 job boards in US and UK have market share of 28% and 32% respectively**

Talent Marketplace (India + SEA + ME)



Assisted Search

India **\$3.8 Bn**, SEA & ME **\$5.1 Bn**

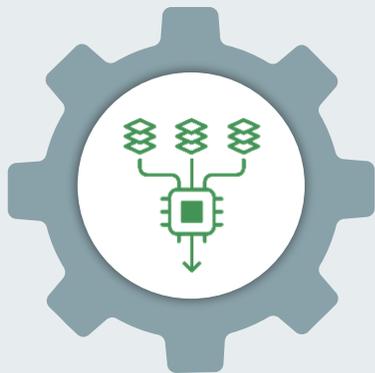
13%

\$16.4 Billion

2025P

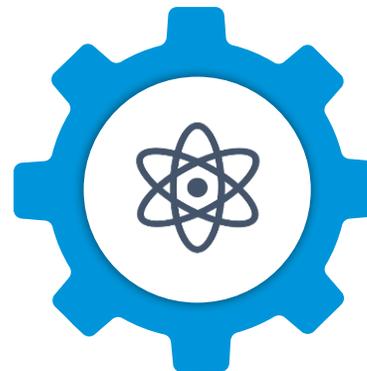
Product Differentiation built around 3 core principles to build a category defining company

DATA SETS



- More information per candidate through UGC, SGC, & PGC
- Largest & Richest Contextual Information to offer a range of Candidate Services
- Vantage point at the beginning of the funnel & depth of information

FULL STACK



- Interoperable platform architecture
- Intelligent job postings & screening
- Proprietary & 3rd party skilling & assessments
- P2P engagement
- Automated hiring work-flows – assisted search

NETWORK EFFECTS



- Seeker communities focused on contextual interactions
- Multiple use cases for engagement & P2P interaction of both candidates & recruiters
- Strategic partnerships for growth hacking
- Position as eco-system player leading to product & solution Aggregations

Monster Talent Platform to provide disruptive value to both Candidates & Recruiters

Core Product

- Best-in-class search & matching based on best data sets
- Cohort based matching for personalization
- Best of both - Active & Passive hiring - to generate most relevant outcomes

Candidate Services

- Widest range of services based on contextual data
- Open architecture & Partnerships providing complete platform experience
- Nurturing platforms for better candidate lifecycle management

Assisted Search

- Multiple modes of engagement – pay per profile/interview/ hire
- Eco-system play focused on aggregation & automation
- Campaign based SAAS product for customized hiring

- Higher realization per customer – value selling
- Best-in-class community engagement
- Demonstrable ROI through platformization
- Thought leadership position as eco-system aggregator

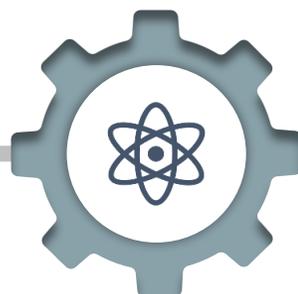
Focus on Five Operational Engines delivering Aggressive Growth & Strategic Edge

Product extensions



- Intelligent job postings & screening
- Proprietary & 3rd party skilling & assessments
- P2P engagement
- Automated hiring work-flows
- Candidate lead hiring process

Eco-system approach



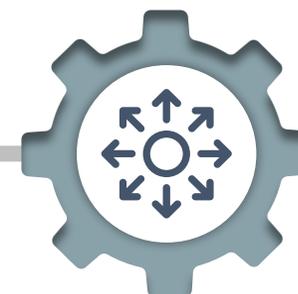
- Technology OEM partnerships
- Ed Tech & assessment partnerships
- College partnerships
- ATS / Internal MP partnerships

Brand re-positioning and expand reach



- Positioning as thought leader in solving full recruitment life-cycle challenges
- Reconnect with Gen Z thru partnerships, campaigns & gamified engagement
- Positioning as Global Talent Management partner

Aggressive expansion



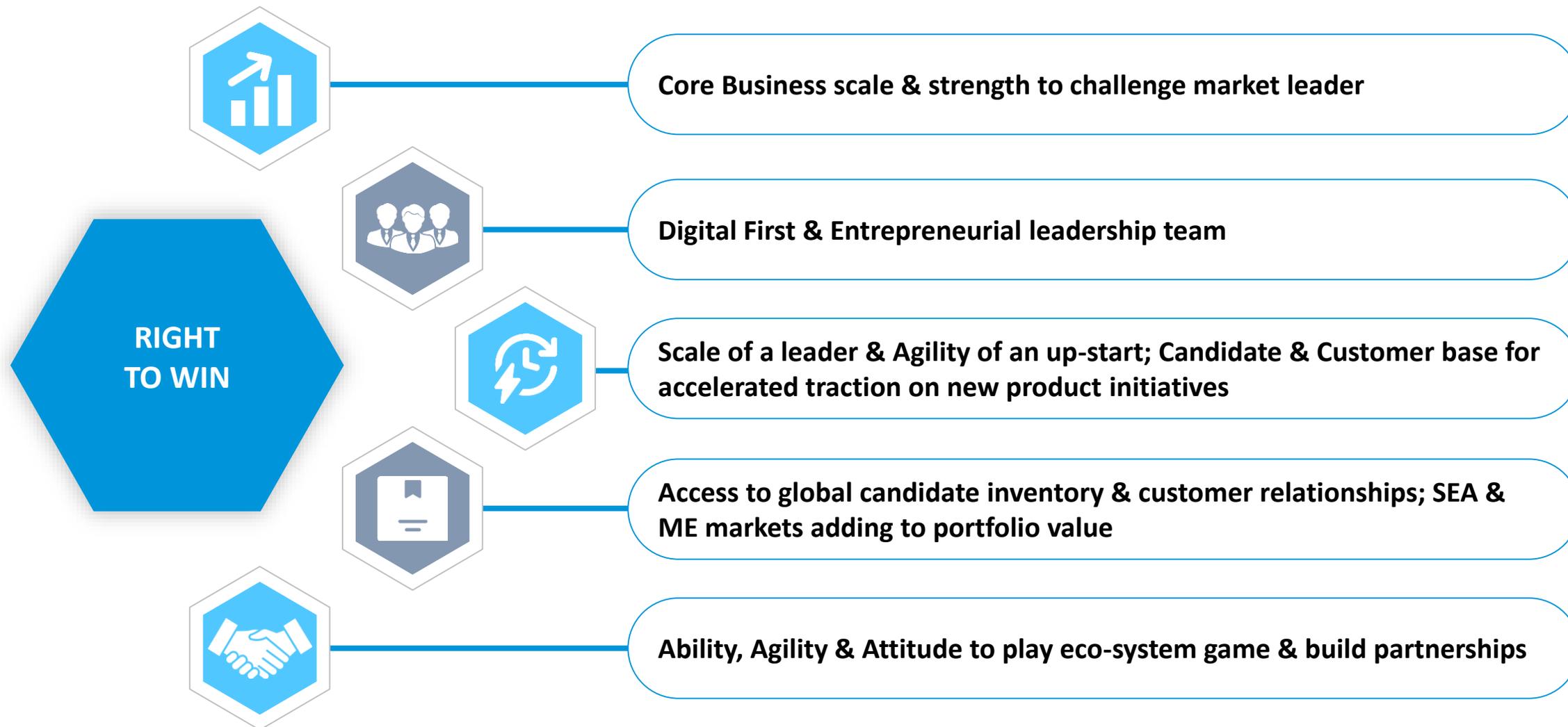
- Expand GTM scale & outcomes with investments in people, digital driven sales & content based marketing
- Double down on SEA & ME markets to improve portfolio metrics

Reap network effect benefits



- Seeker re-activation @scale for lower CAC
- Strategic partnerships for growth hack
- Position as partner of choice for eco-system participants leading to product & solution innovations

Monster is uniquely placed to address this opportunity



Distributed Field Workforce Platform

Friction Points

Hire **Q jobs**

Candidates

- Difficulty in discovering hyperlocal jobs
- Skill gap to get aspirational jobs
- Delays and Lack of transparency in hiring process

Employers

- Unable to access skilled talent at scale
- Time consuming screening and validation process
- Lack of verified and skilled candidates

Manage **work**

Employees

- Offline and ineffective interaction with organization
- Unable to track and report their daily work
- Poor employee engagement with the organization

Employers

- Difficult to Manage distributed workforce
- Hard to monitor daily productivity
- High employee churn rate and dissatisfaction

Engage **Dash**

Employees

- Financial insecurity is the #1 concern for employees
- Employees expect benefits and engagement in their jobs

Employers

- Hiring and Retaining Frontline Employees is the #1 challenge for Companies
- Employee engagement and benefits impacts margins in manpower driven businesses

422k+ FTEs

1k Full time recruiters

500k+ Candidates Processed Annually

65 Offices across 34 Cities

150 Trainers

27% of employees hired from outside Tier 1 cities

Distributed Field Workforce Platform – Story so far....

1

Q jobs

- Solving for Discovery by **Digitally Connecting Employers with Job-Seekers**
- Upskilling with **Micro Learning and Certifications**
- **AI Assisted Hiring** with Fastrack for **On-board Ready Candidates**

- **3.4M+** Registered Job Seekers
- **1.2 M+** Recruiter-candidate interactions facilitated monthly
- **>500k** Skill assessments enabled on the platform monthly

2

worq

- **Mobile first, vernacular** frontline workforce management platform
- **Productivity Modules** that robustly govern employees' day to day activities
- **Learning and Engagement** to upskill and empower employees

- **270k+** Monthly Active Users
- **2.6 M+** Attendance markings performed monthly
- **97%** Survey response rate

3

Dash

- **Benefits marketplace** with **200+** Products from **70+** Partners and **12+** Categories
- **Reduces Employee Attrition** by 19%
- **Daily Micro Engagement** with **80%** repeat rate via Quizzes, Games, Surveys

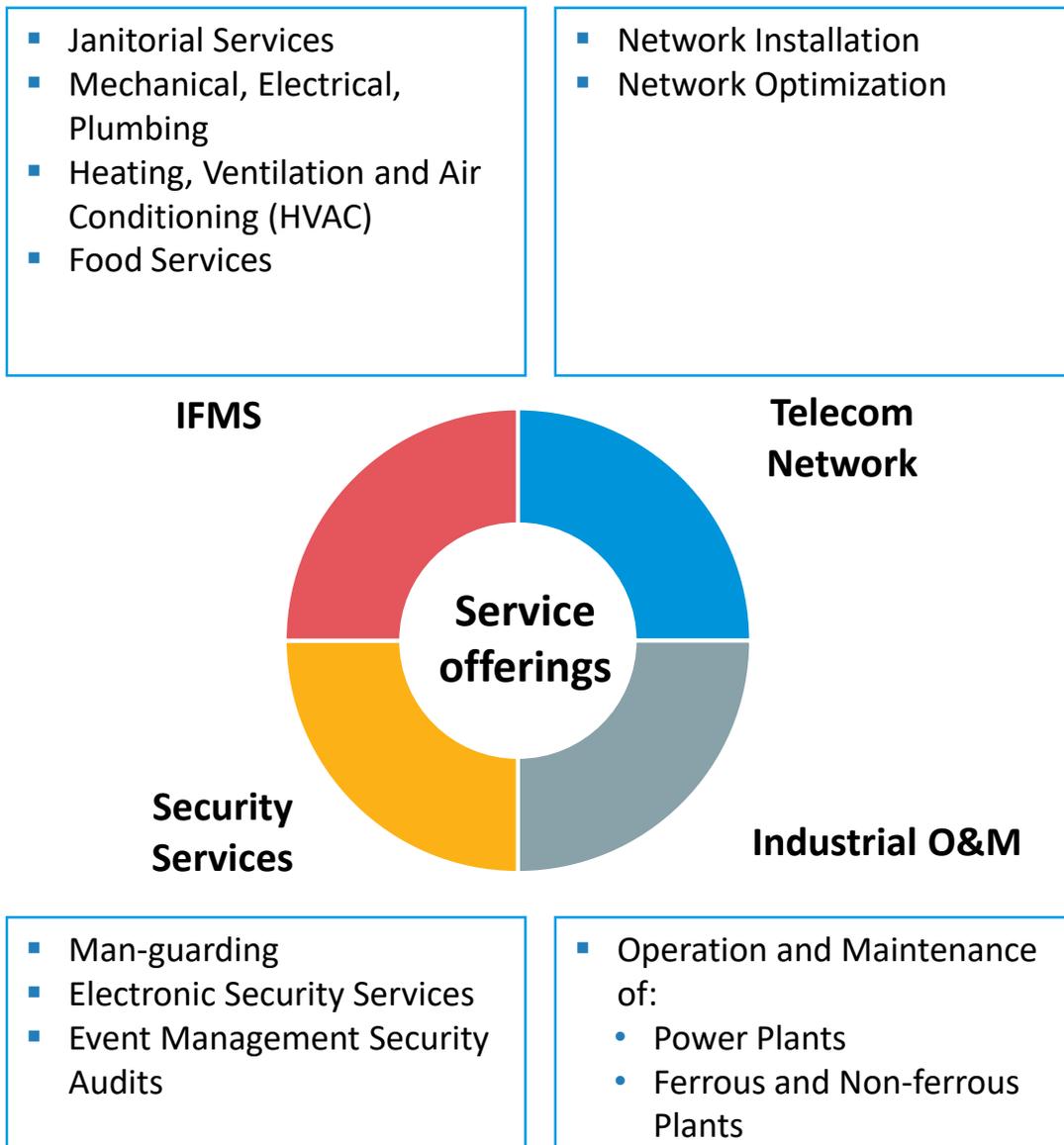
- **54+ Cr.** Annual GMV Run Rate
- **1.5 Lakhs** Monthly Active Users
- **8 Visits** per user per month

Scale Achieved

Operating Asset Management

Guruprasad Srinivasan
ED and CEO

Quess OAM: Bird's eye view



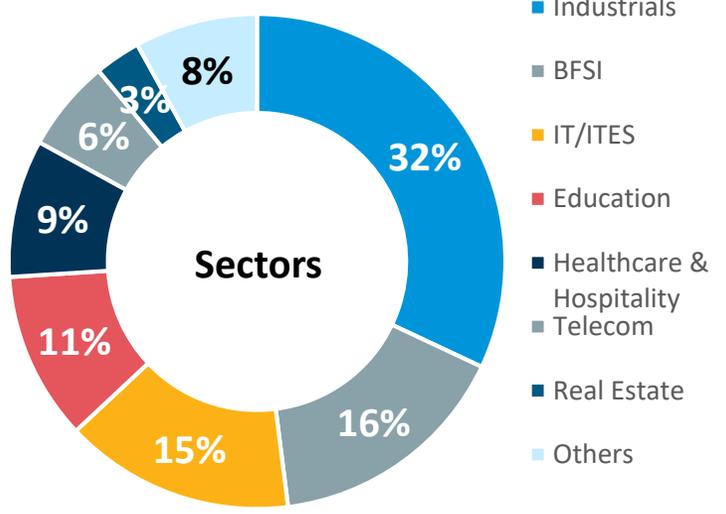
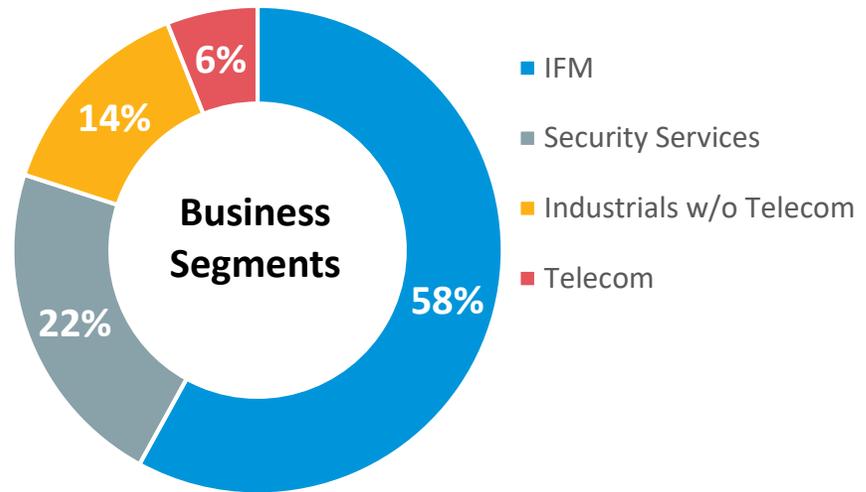
Highlights

- 279 Mn+ Sq. Ft. Space**
Managed
- HC: **83K+**
Associates
- Security: **2,400**
operating sites
- 53** Hospitals
managed
- 2,000MW** power
plant managed
- 2.8 Mn** meals served
per month

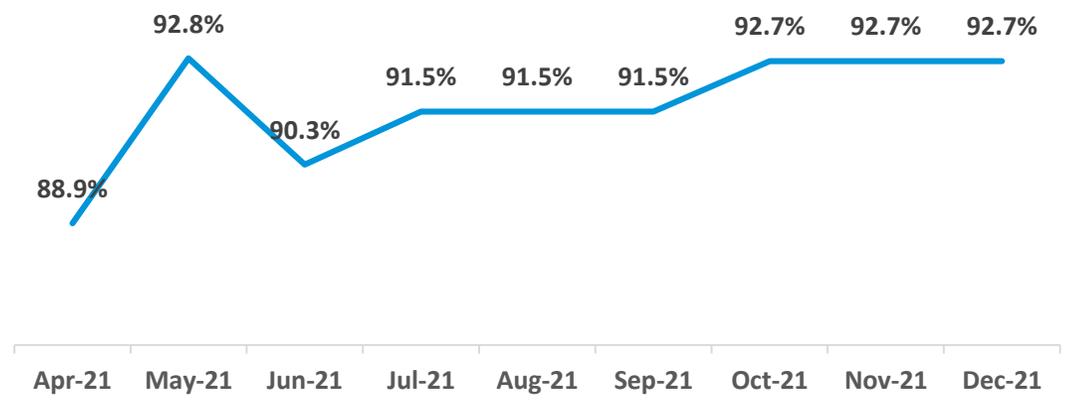


OAM: Revenue distribution and customer insights

Revenue Distribution



% Revenue from Direct Contracts have gone up



Security business has built PAN India presence



Exists – 22 States

In Process -- 2 States



Private Security Agencies (Regulations) Act – 2005
9001:2015 : ISO Certified company accredited to TUV SUD

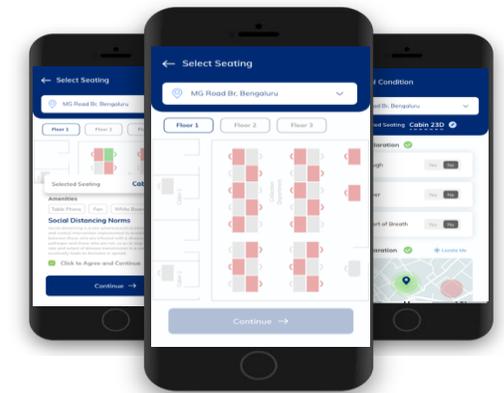
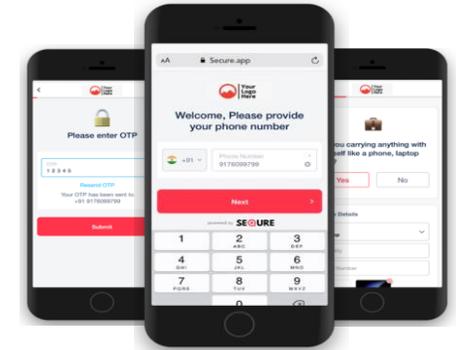
OAM: Technology Drive

DIGITAL DRIVE OUTBOUND

- **Upscaled home grown SeQure App – Digitizing FM operations**
 - Visitor Management System (~500 sites)
 - Helpdesk Management system (~500 sites)
 - Checklist & Asset Management System (more than 500+ logins)
 - Space Management (Anchor customer IBS software with 3000 logins)
- **Digital Supervisor app** for Retail and Distributed Asset Mgt.
- **Home grown Food App** (implemented in selected customer sites); All existing food sites to go live by Q1 FY 23
- **100% of attendance** now captured digitally
- **Q-bridge:** Digitization of Site survey to Invoicing , soft launched, Q1'23 target to migrate in full.

DIGITAL DRIVE INBOUND

- Digitized on-boarding of Associates strengthened in POP
 - BGV increased from 45% to 95% completion
 - Features added to align new labor laws related to Aadhar and UAN.
 - 100% digitized attendance
- **In Pipeline**
 - Qbridge – App to bridge from **Site survey** to **Invoice generation** online.
 - Retail FM Application – On call FM for Retail.
 - Meeting room Management



OAM: Focus Areas

Growth Drivers

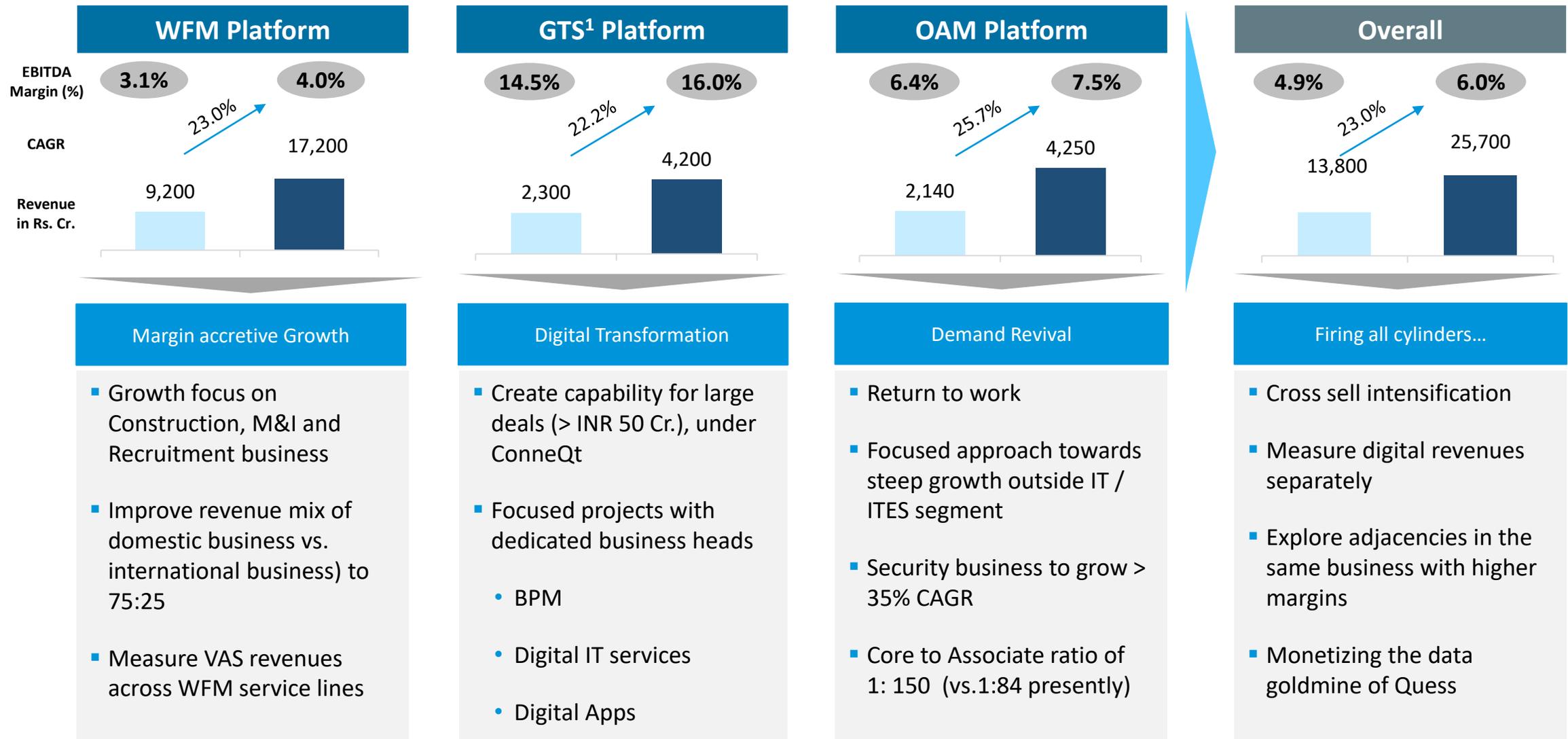
Addressable Market Size

IFM	Return to Work	Specialized Cleaning	Service Integration	Value added services	USD 12-15 billion
Security	Building all India presence		Electronic Security	Premium Services	USD 10-12 billion
Industrials	Formalization of workforce	Increasing Infrastructure Spending		Renewable energy	USD 1-2 billion
Telecom	5G Rollout		End-to End System Integration		USD 0.5-1 billion



Closing Remarks

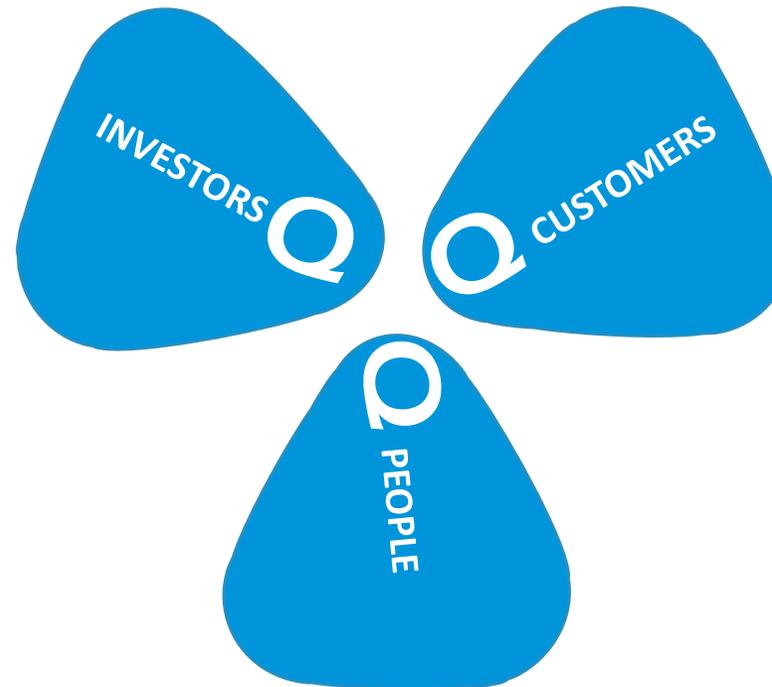
FY25 Segment wise evolution & value drivers



¹ Without Emerging business

Quess 3.0

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

Thank You





Q & A



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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 14- 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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