

# Info Edge (India) Limited

India's internet classifieds company

August, 2018

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Data, numbers and statements made are what the company or investee company believes are a reasonable representation of the respective business(es).

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All figures mentioned are for Info Edge (India) Ltd. as a standalone entity and are as of Mar 31, 2018 or for the quarter ended Mar 31, 2018, unless indicated otherwise

Q1 FY19 or Q1 FY18-19 means the period Apr 01, 2018 to June 30, 2018

FY18 or FY 17-18 or FY 2018 means the Financial Year starting April 1, 2017 and ending March 31, 2018

1 Crore = 10 Million = 100 Lakh

## Our internal businesses



Dominant market leader



India's leading real estate site



Number 3 but fastest growing



India's leading education listings site

# Strategic investments<sup>#</sup>



India's leading restaurant ratings and review site

Shareholding ~30.9%\*<sup>@</sup>



India's leading insurance comparison site

Shareholding ~13.6%\*<sup>^</sup>



Supplementary online learning platform for K12 and Entrance Exams

Shareholding ~66%\*



Men's grooming range (Ustraa) and women's range (Happily Unmarried)

Shareholding ~47 %\*

<sup>#</sup> Other strategic investments include Vacation Labs (SAAS solution for tour operators, 26%); Unnati Helpers (Tech enabled employment software, 28%); Rare Media Company (Field sales force management, 35%); Diro Labs (Phonebook app, 15%); Wishbook (Catalog sharing app, 22%), NoPaperForms (Advanced enrolments management platform, 28%), Univariety (Guidance on careers, admissions and tests ,30%), Zippserv (Online real estate intelligence platform, 29%), Gramophone (Agri-Inputs e-commerce, 25%), Shoekconnect (B2B footwear marketplace, 21%), Printo (Retail chain providing print and document services, 24%)

\* Approximate shareholding on fully disbursed and converted basis, held directly or indirectly (through subsidiaries, associates or affiliates). The % shareholding may or may not translate into an equivalent economic interest on account of conditions in the investment/ shareholders agreements.

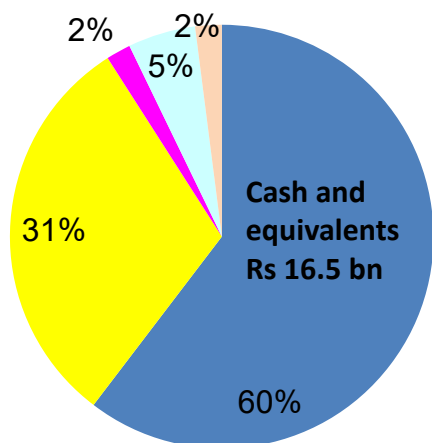
<sup>@</sup> Net of disposal of secondary sale with proceeds of USD 50 mn; Shareholding post the latest round of investment and dilution

<sup>^</sup> Represents effective economic interest held by Info Edge directly (1.3%) and indirectly through subsidiary companies – in partnership with Temasek (7.9%) and Softbank (4.4%)

# Info Edge has a strong balance sheet

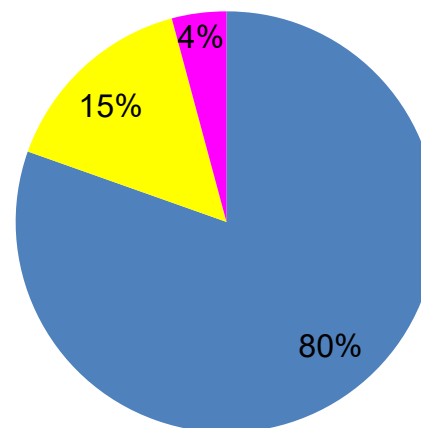
As of June 30, 2018

**Assets – 60% Cash**



- Cash & Liquid Investments
- Strategic Investments
- Net Fixed Assets
- Non Current Assets
- Current Assets

**Liabilities – Negligible leverage**

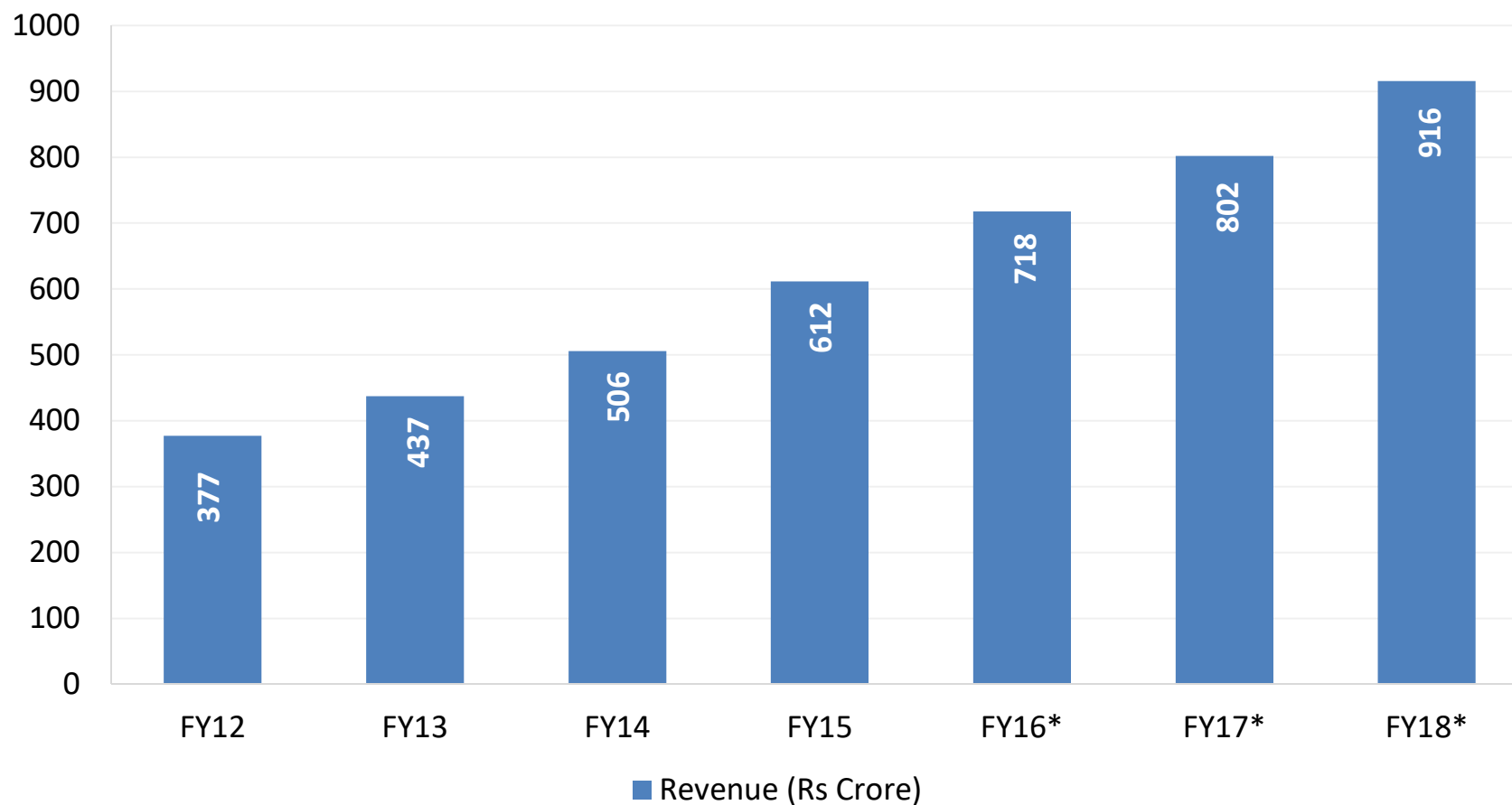


- Shareholders Equity
- Deferred Sales Revenue
- Liabilities & Provisions

**Info Edge has negative working capital, high margins on account of operational leverage and strong capital efficiency – which leads to very strong cash accretion**

# Financial performance track record

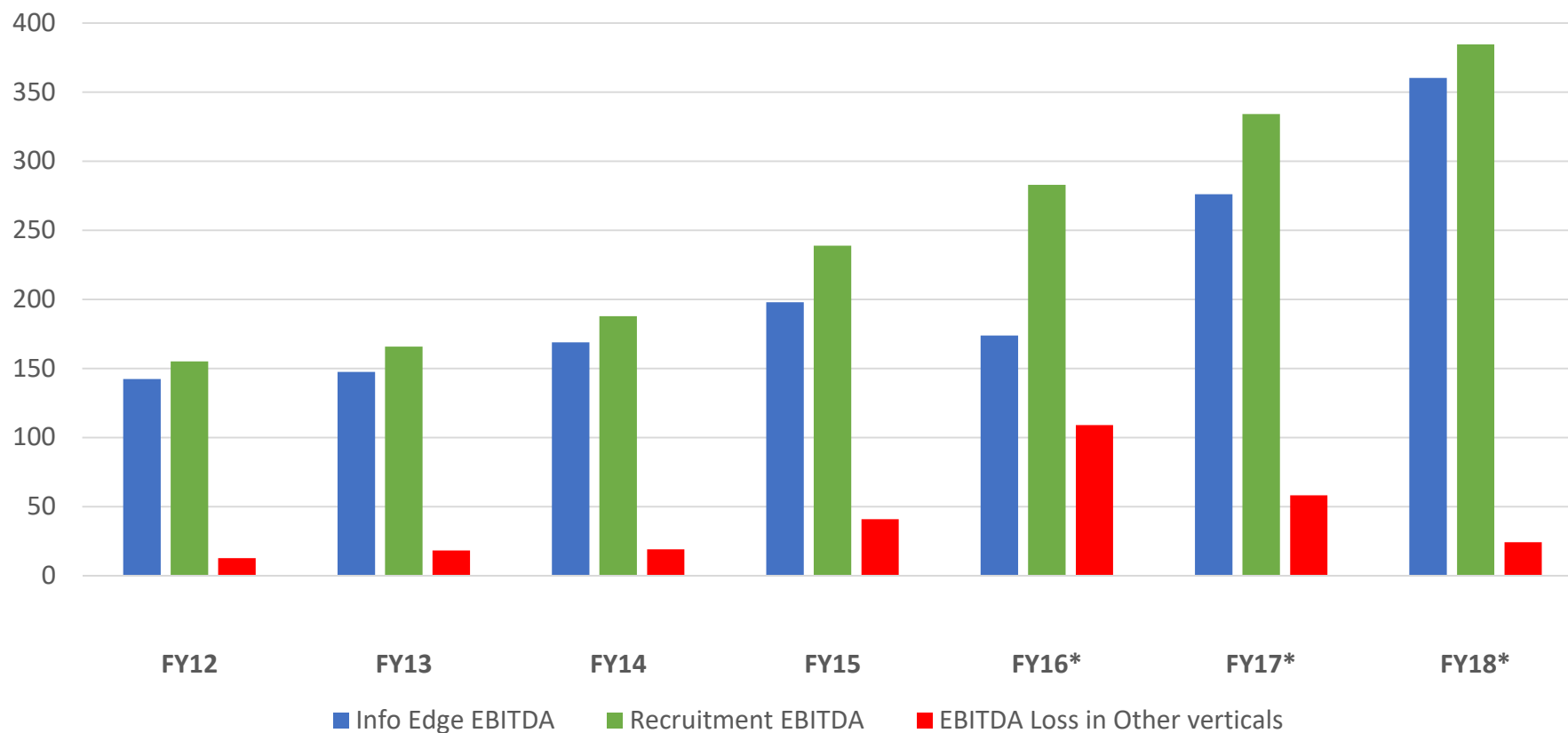
Revenue (Rs crore) for the standalone entity (2012 – 2018)



- IND-AS numbers for FY16-FY18; Margins for FY16-FY18 calculated on EBITDA adjusted for non-cash charges. Rest all years in I GAAP.

# Segmental operating EBITDA

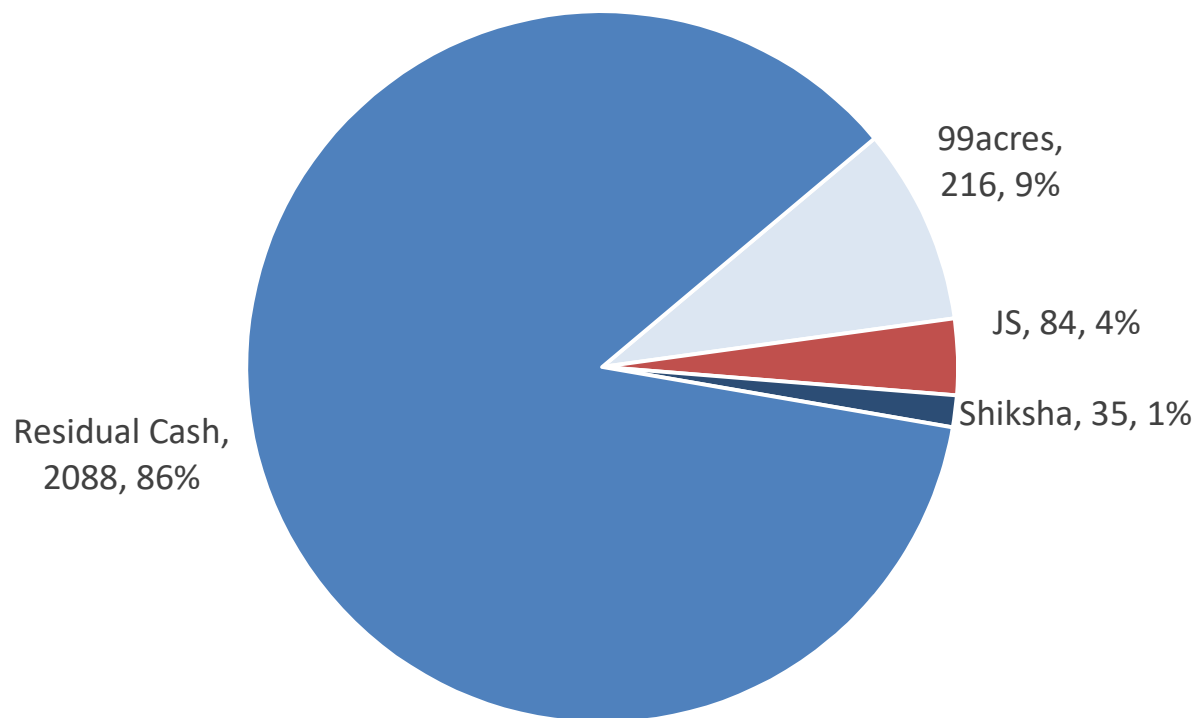
Info Edge and Segment-wise EBITDA (Rs crore)



\* FY16 - FY18\* in the charts above are IND-AS EBITDA numbers adjusted for non-cash charges, so as to be consistent with rest all years which are as per I GAAP

# Recruitment profits ploughed back to build 99acres, Jeevansathi and Shiksha

Total Cash generated from Recruitment business since inception (Rs crore)



**Only 14% of the cash generated by recruitment has been used to fund other businesses till FY18**

Above numbers are before adjusting for savings of ~33% due to tax shield



# Corporate Governance

- Independent Directors are a majority on the Board
- Separation of Chairman and CEO role
- Non Executive Chairman
- Statutory Audit performed by EY
- Internal Audit performed by an external firm
- Audit committee comprises of only Independent Directors
- Formal dividend policy (15 to 40% of standalone PAT)
- Whistle blower mechanism

# Board of Directors

## Whole time

### Sanjeev Bikhchandani (55)

Founder and Executive Vice  
Chairman

BA Econ. St. Stephen's.  
PGDM IIM-A

Previously with GlaxoSmithKline

### Hitesh Oberoi (46)

Managing Director and CEO

B.Tech IIT Delhi,  
PGDM IIM-B

Previously with HLL (Unilever)

### Chintan Thakkar (51)

Director and CFO

Chartered Accountant  
Previously with Computer  
Associates, India

## Non Executive

### Kapil Kapoor (53)

Chairman & Non Executive  
Director

B.A.Econ, PGDM IIM-A

Previously COO (Global Business  
Development), Timex Group

## Independent

### Saurabh Srivastava (72)

Independent Director

B.Tech IIT Kanpur,  
M.Sc Harvard  
Founder IIS Infotech  
(Now Xansa)  
NASSCOM, TIE, IAN, IVCA

### Arun Duggal (71)

Independent Director

B.Tech IIT Delhi, PGDM IIM-A  
Previously with  
Bank of America &  
HCL Technologies

### Bala Deshpande (52)

Independent Director

MA Econ., MMS JBIMS

Sr. MD, New Enterprise  
Associates (NEA)

### Naresh Gupta (51)

Independent Director

B Tech IIT Kanpur, Ph.D, University  
of Maryland

Previously MD, Adobe India

### Sharad Malik (54)

Independent Director

B Tech IIT-D, MS, PhD, University  
of California

Chair-(Deptt. of Electrical  
Engineering), Princeton University

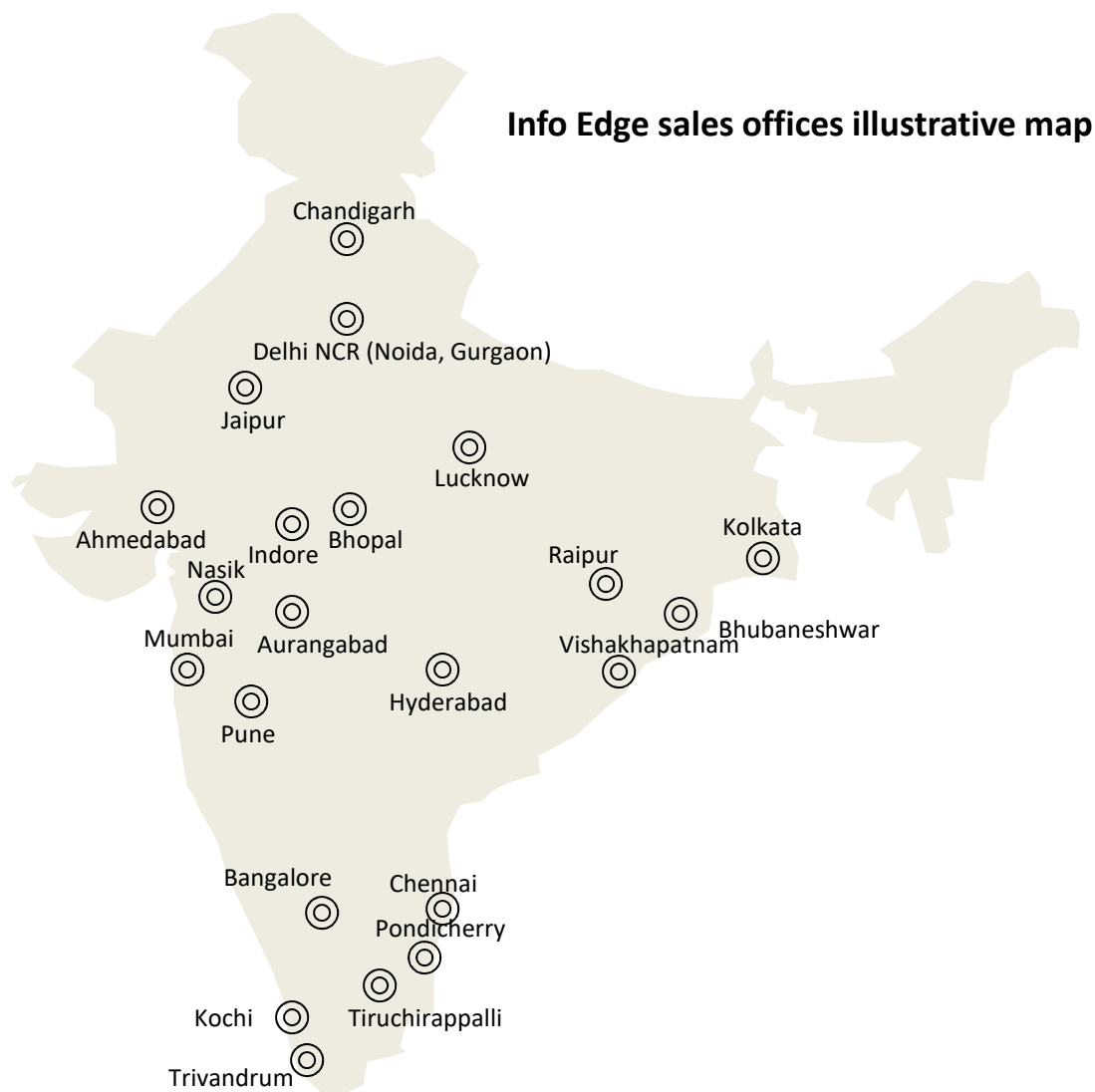
### Ashish Gupta (51)

Independent Director

B Tech IIT-K, Doctorate from  
Stanford University

Founder Tavant Technologies,  
Jungle; Amazon

# Nationwide sales/customer interface infrastructure

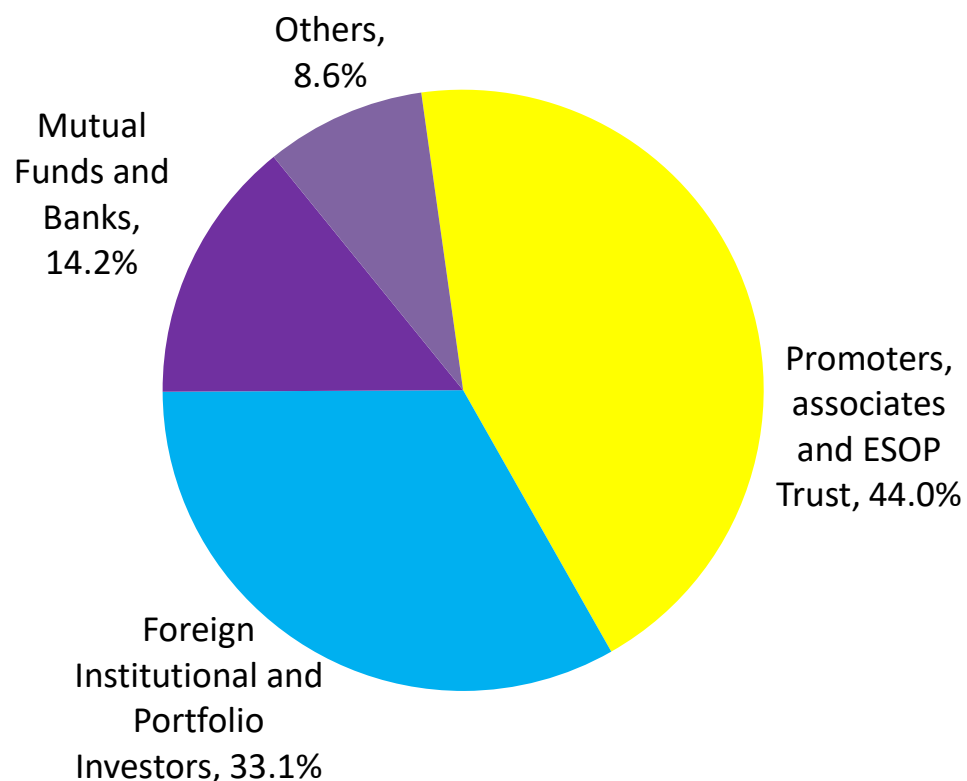


## Key Observations

- Nation wide coverage through 71 company branch offices in 46 cities in India
- ~ 2,808 sales/ servicing/ client facing staff or 68% of the company's\* workforce of ~4,133

\* Including Allcheckdeals, a wholly owned subsidiary

# Promoters and associates holding ~44% and Institutional Investors holding ~47% (as of June 30, 2018)



Axis Mutual Fund	3.70%
Ward Ferry	3.23%
Nalanda	3.16%
Amansa	3.01%
Aranda Investments (Temasek)	2.68%
Goldman Sachs EM Fund	2.51%
Matthews	2.38%
Reliance Mutual Fund	2.38%
Mirae Asset	2.31%
Vanguard	1.64%
Franklin Templeton MF	1.52%
SBI	1.26%
Morgan Stanley (Mauritius)	1.15%
Karst Peak	0.96%
Capital Group	0.87%
Postal Life Insurance Fund	0.84%
TVF Fund	0.81%
Emerging Markets Asia Growth Fund	0.80%
City of New York Group Trust	0.75%

Total number of issued and paid up shares of Rs 10 each are 121.5 million (post 1:1 bonus in Sept, 2010, 1:1 bonus in Jun, 2012 and dilution (QIP) in Sept, 2014)

The screenshot displays the Naukri.com website interface. At the top left is the Naukri.com logo with the tagline "India's No.1 Job Site". The main navigation bar includes "JOBS" (highlighted), "RECRUITERS", "COMPANIES", "SERVICES", "MORE", "LOGIN", "NOTIFICATIONS", and "Employer Zone" with a "Buy Online" link. Below the navigation bar are category tabs: "All Jobs" (selected), "IIT/IIM Jobs", "Govt. Jobs", "International Jobs", and "Walk-in Jobs".

The main content area is divided into three sections:

- Search Jobs:** A search bar with the text "Search Jobs" and a blue "Search" button. Below it, "Recent Searches" lists "java programmer- 186 new jobs" and "investor relation- 135 new jobs".
- Recommended Jobs:** Shows 27 jobs. A featured job is "Head Public Relations - Technology - MNC PR Firm, Bangalore" with 12-18 years of experience in Bengaluru/Bangalore. A "View All Jobs" link is provided.
- New to Naukri?:** An orange "Register with us" button, followed by "or" and a blue "Upload CV" button. Below the CV button, it states "Max 2 MB, doc, docx, rtf, pdf" and "We will fill your details".

Below the main content area is a horizontal banner with several elements:

- Buttons for "HIRING" and "APPLY NOW".
- Logos for Shell, Genpact, and Synechron.
- Text: "Get best matched jobs on your email. No registration needed" and a green "Create a Job Alert" button.

At the bottom, there are two sections:

- Top Employers:** Features the logo for Virtusa with the tagline "Accelerating Business Outcomes".
- Best Places to Work:** A navigation bar with "All Sectors" (selected), "Information Technology", "Manufacturing", and "Services".

# Key business metrics for Naukri

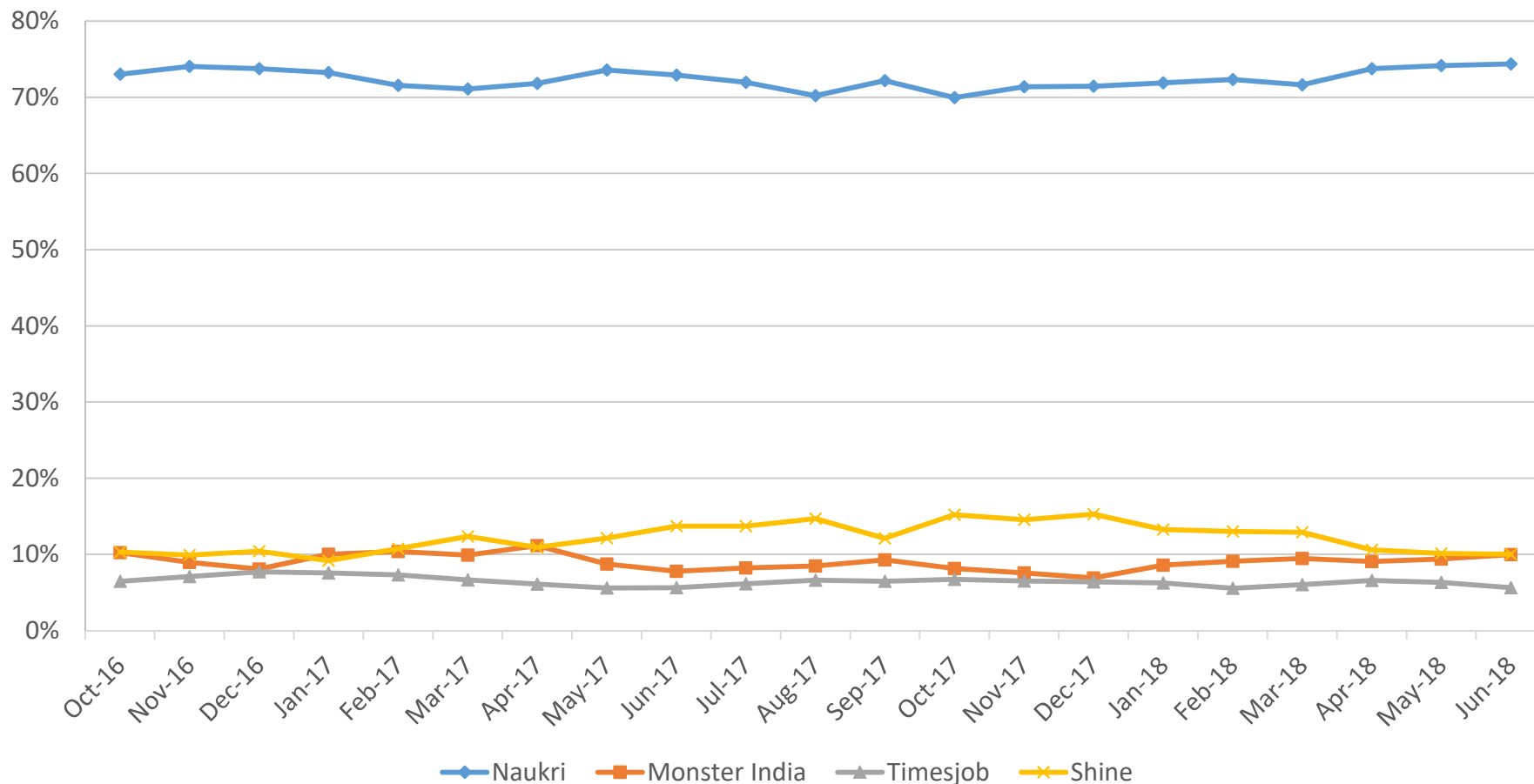
- During or end of, Q1 FY 18-19
  - 74% traffic share\* in June, 2018 (Source : SimilarWeb)
  - ~59 million resumes
  - ~500,000 avg. job listings on a given day
  - 18,000 avg. resumes added daily
  - 350,000+ resumes modified daily
  - 800,000 to 1,000,000+ resume searches daily
  - 7.5 to 10.5 million resume contacts by recruiters daily
  - 49,000+ job seekers availed premium services
- 52,663 unique clients in Q1FY19 vs 47,216 in Q1FY18 (based on IND-AS revenue)

\* From desktop and mobile web combined

\* Comparison among job-boards excludes LinkedIn and Indeed

# Naukri has dominant traffic share

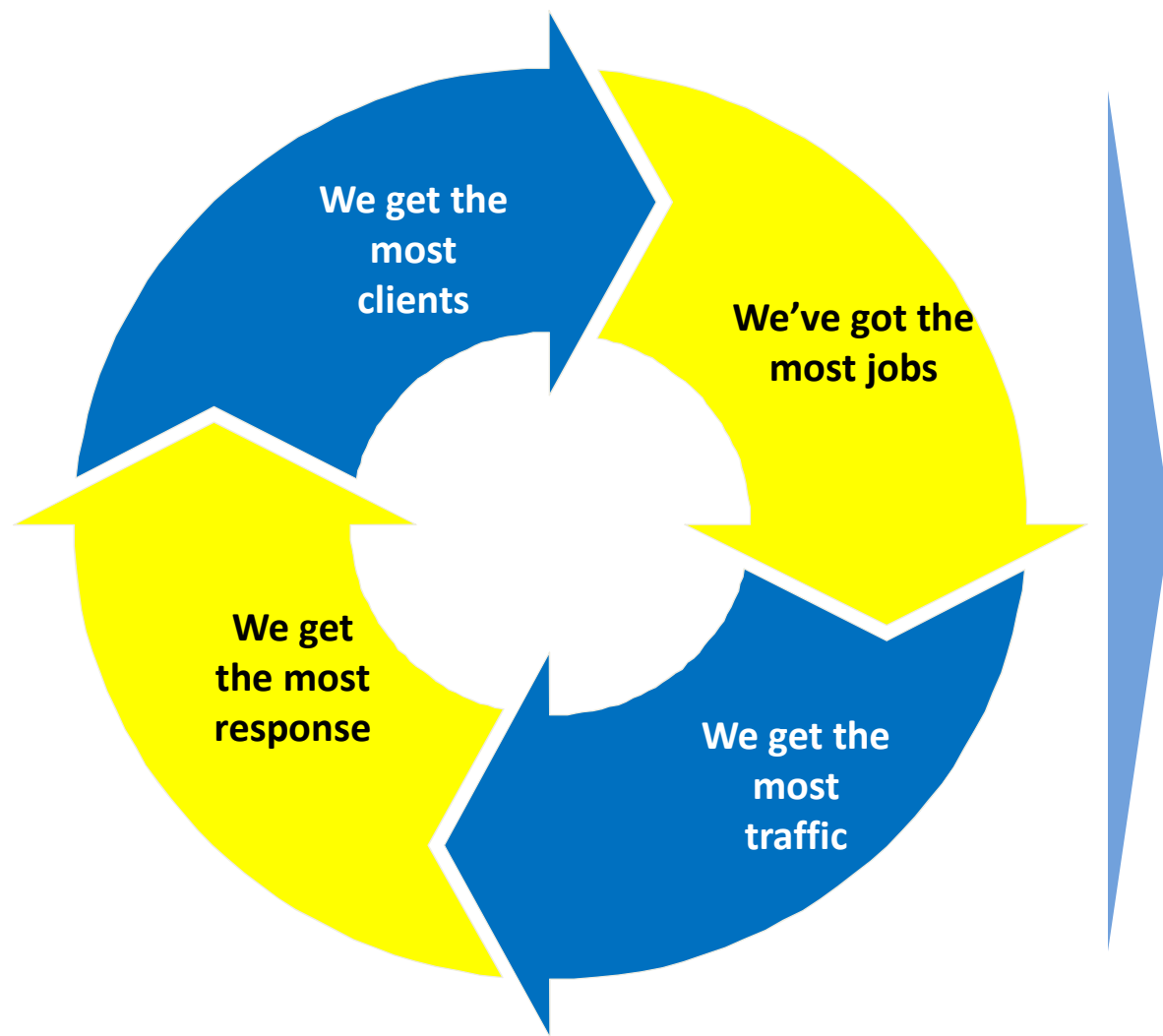
Overall traffic (from desktops & laptops and web mobile) based on time spent



Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs

# Naukri is a business of the virtuous circle



## Benefits

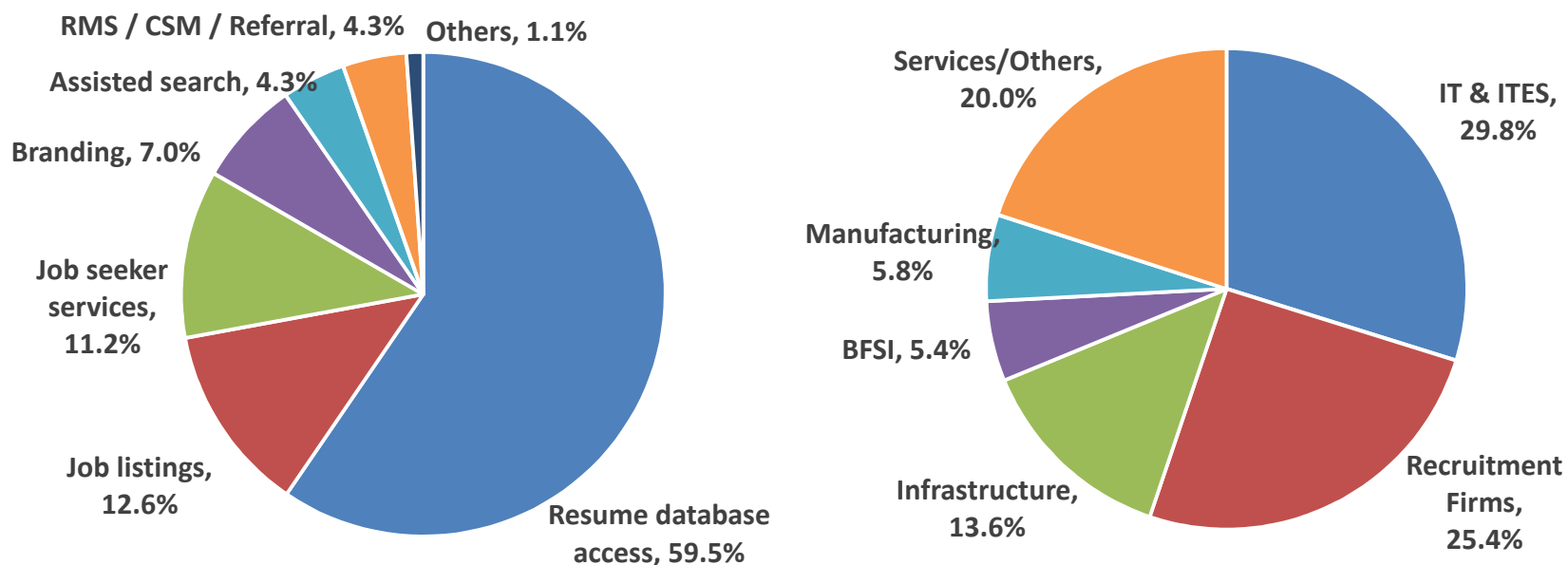
- Naukri has over 100% of industry profits enabling greater investment in
  - Product innovation
  - Engineering
  - Brand support
  - Sales network
  - Servicing back office
  - Superior talent



## Revenue sources for Naukri

- B2B revenues comprise ~89% of overall Naukri revenue and includes:
  - Resume database access
  - Job listing (response management)
  - Employer branding (visibility)
  - Career site manager
  - Others - Resume short listing and screening, campus recruitment
  - Non recruitment advertising (other than for jobs)
- B2C includes revenue from
  - Job seeker services

# Breakup of revenue by product type and industry in Trailing 12 months to June 2018

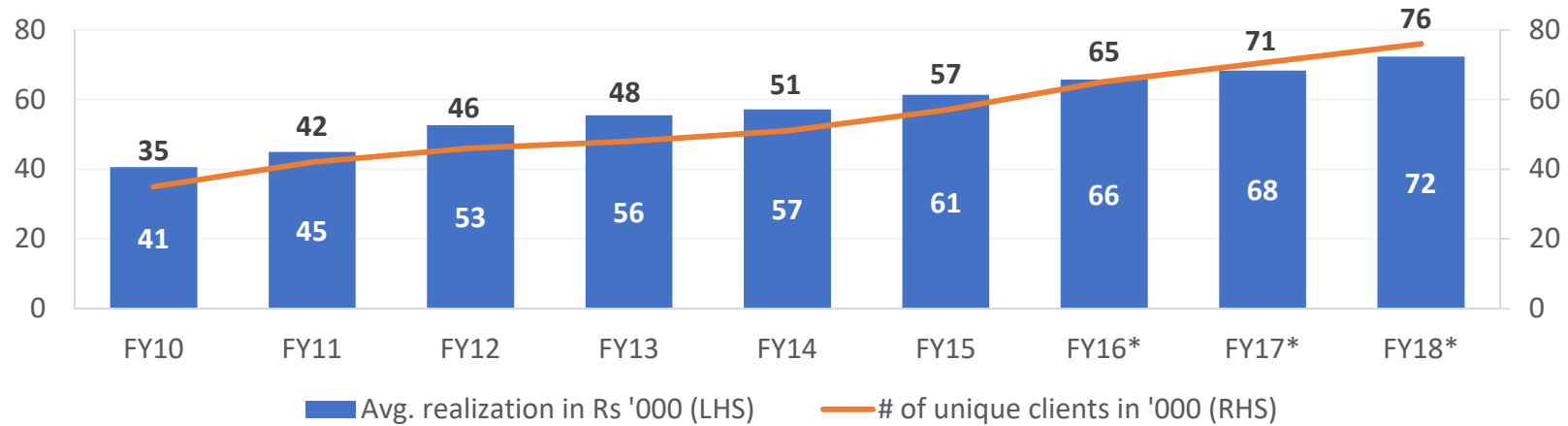


From our interaction with recruitment firms, we believe 50% of their revenues come from IT industry; Accordingly, IT and ITeS contributes ~40-42% of overall revenues.

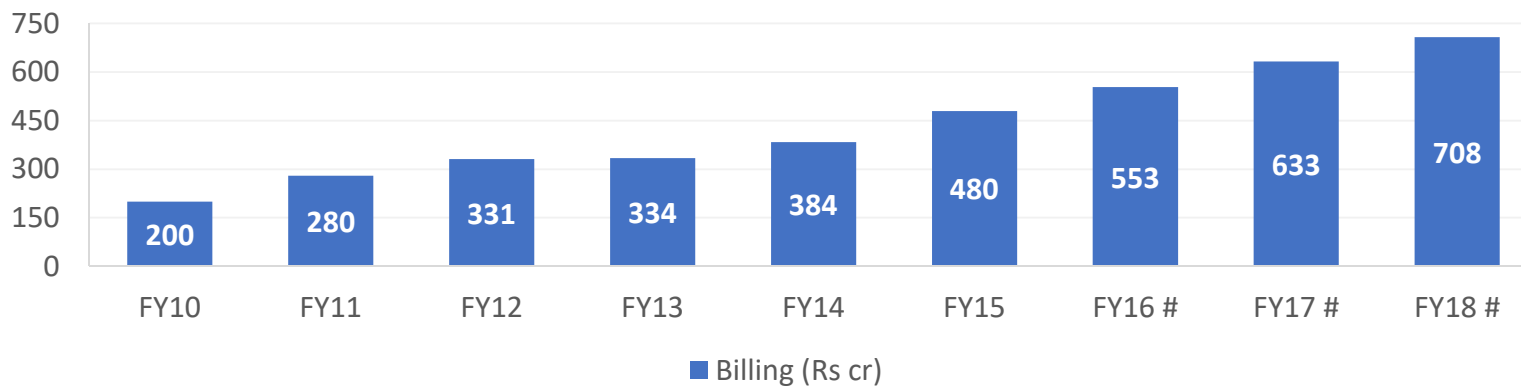
BFSI is Banking, Financial Services and Insurance

# Average Revenue per unique client growing with increasing number of clients\*

Naukri India - Revenue per client and # of clients

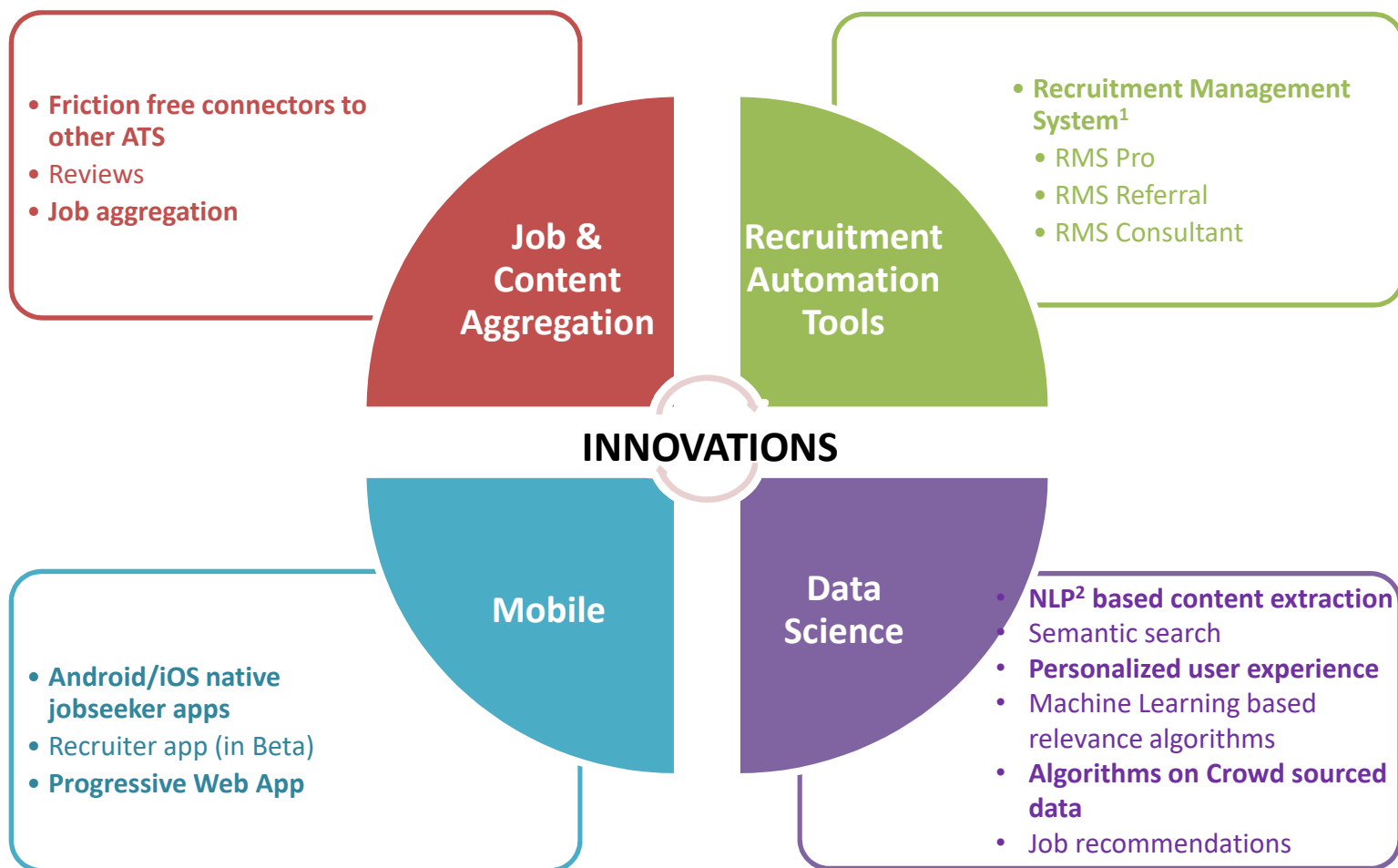


Recruitment segment Billing



\* # FY16 - FY18 numbers in IND-AS, rest all periods in IGAAP.

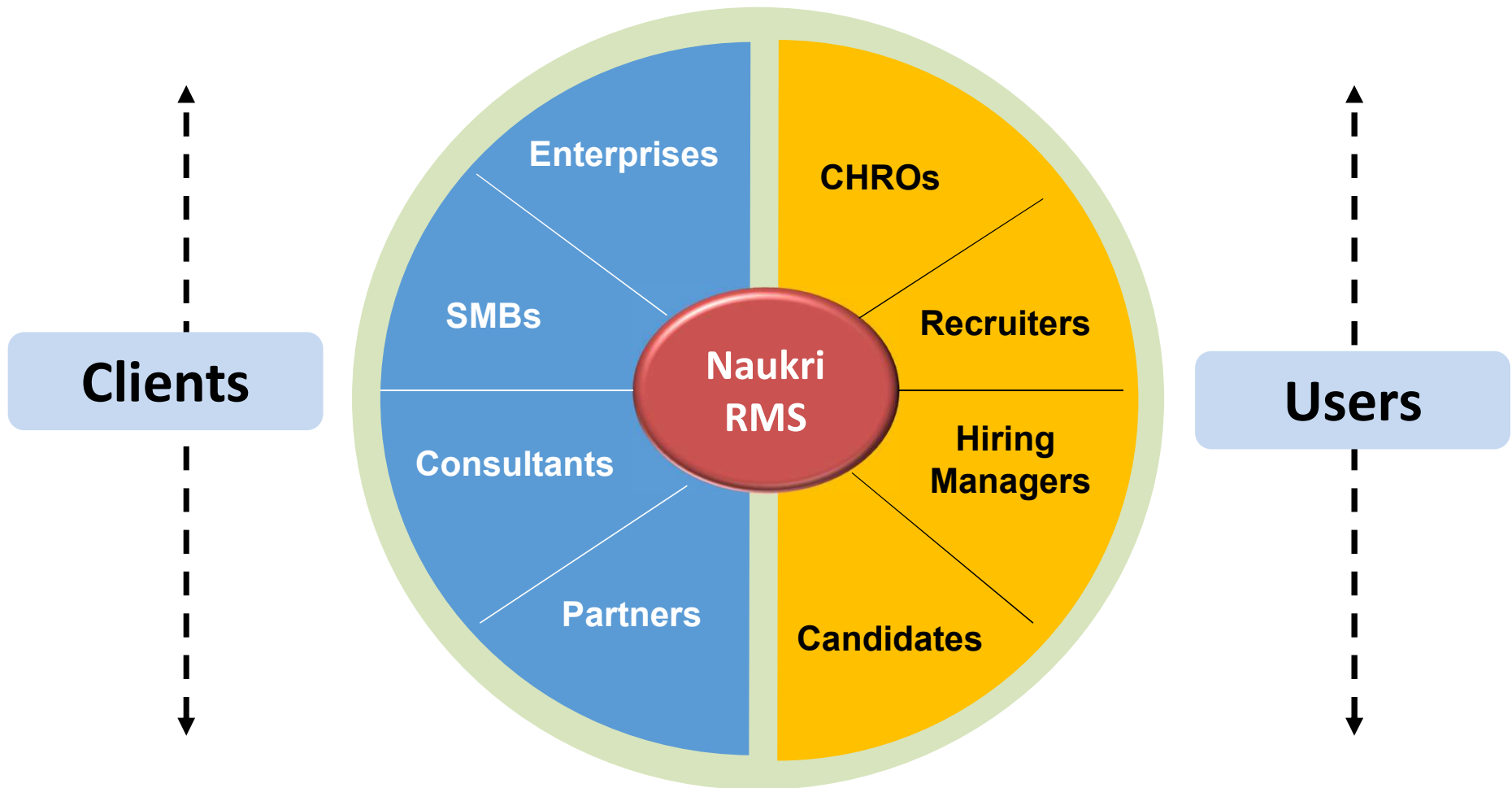
# Product Innovation is cornerstone of our strategy



1 All solutions earlier pertaining to CSM, Response management, application tracking, and referral hiring tool are being rebranded into an automated end-to-end hiring process tool called Naukri Recruitment Management System (Naukri RMS)

2 NLP = Natural Language Processing

# RMS – empowering recruitment ecosystem



- *The career site helps Naukri become part of a much larger ecosystem with thousands of connected corporate sites and RMS would help power the whole recruitment ecosystem*

# Naukri RMS



**naukri**  
**RMS** | RECRUITMENT  
MANAGEMENT  
SYSTEM

**EVOLVE**  
TO A NEW AGE  
**RECRUITMENT SOLUTION**

Automates hiring process, right from  
requisition to offer

**naukri**  
**RMS** | ENTERPRISE

**naukri**  
**RMS** | CONSULTANT

**naukri**  
**RMS** | REFERRAL

23

# Recruiter profile

Platform for public profiles of HR professionals and consultants



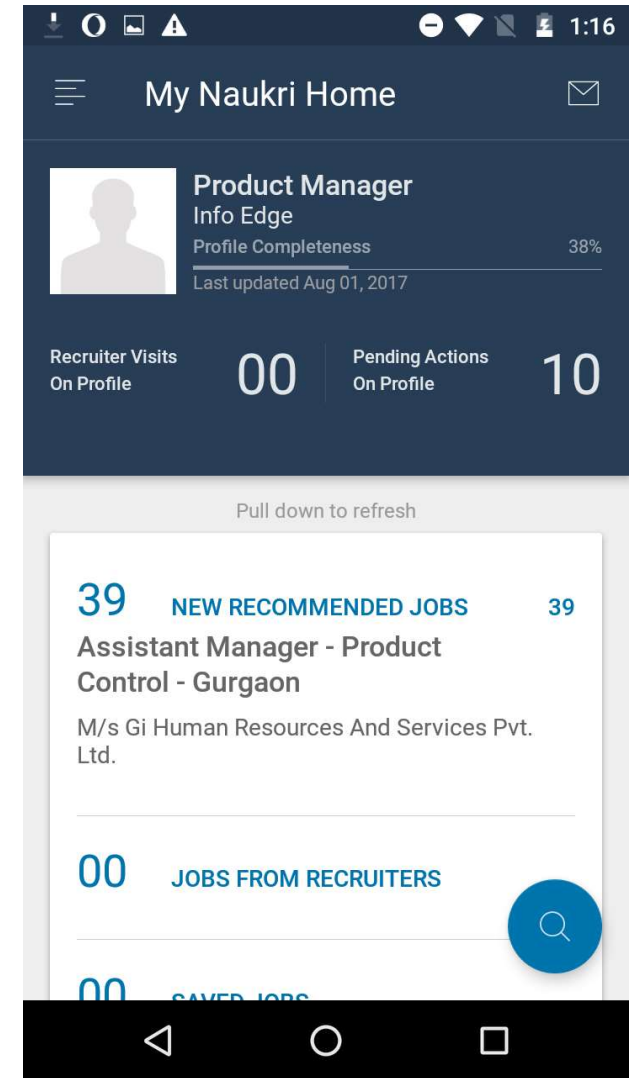
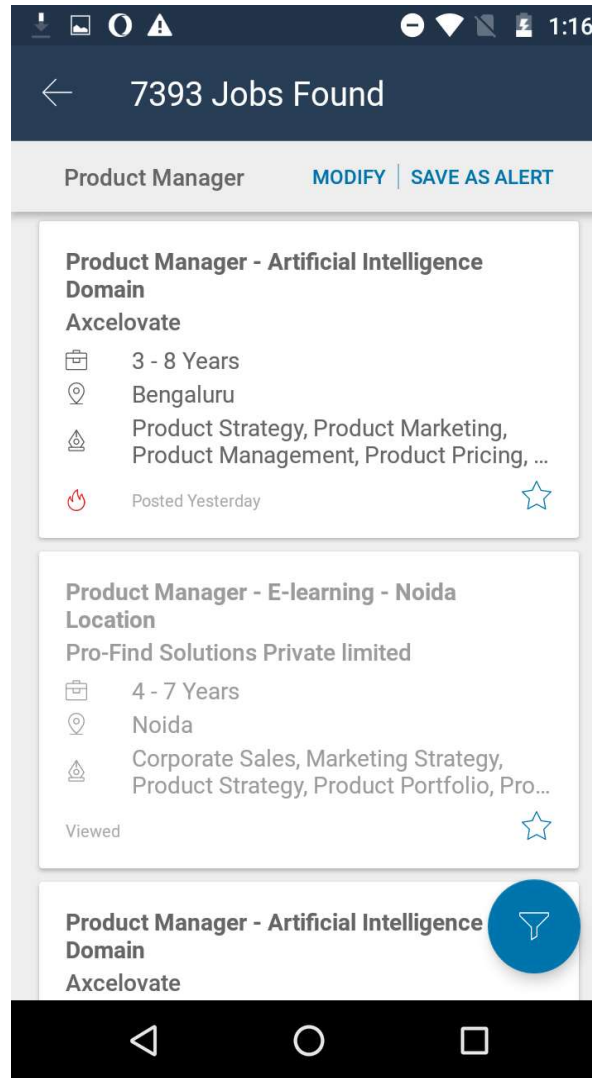
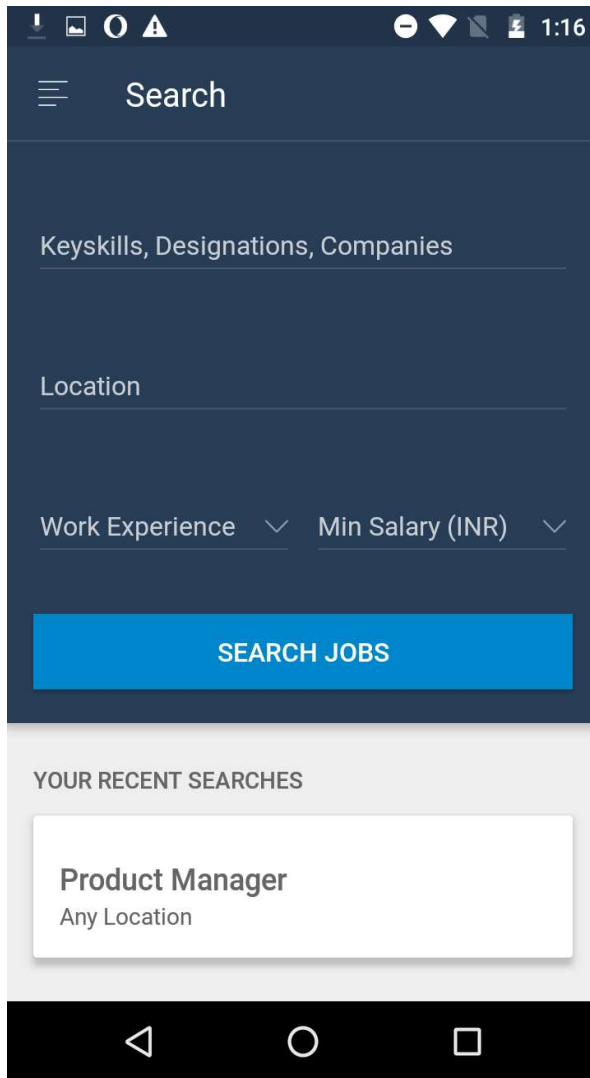
Jobseekers can  
**'FOLLOW'**  
Recruiter Updates

Keep jobseekers  
informed of recruiter's  
Active Jobs

Help Build recruiter's  
personal database

**Over 180,000 jobs have Recruiter Profile details, 40% of these jobs have Recruiter Photographs**  
40% more applies for jobs with a recruiter profile and a photograph attached  
**Jobseekers can search from over 330,000 recruiter profiles and follow them for updates**

# The App and HTML5 site





# Competition

- Local job boards
  - Indeed.co.in
  - Monsterindia.com
  - Timesjobs.com
  - Shine.com
- LinkedIn
  - Caters to a different segment / requirement

# Overseas peer comparison

Name of the website	Approx. revenue from recruitment (in USD mn) @	No. of profiles/resumes in mn	No. of unique clients	Approx. Market Cap of the company (in USD bn )***
51job.com* (China)	443	114	~520,000	5.7
Seek.com^ (Australia)	271	5.5	613,000	5.4
Recruit# (Japan)	1,976	-	-	47.2
Info Edge**	95	59	76,000	1.5

\* Annual report/ presentation for year ended December 31, 2017

^ Domestic revenue from Australia New Zealand as per annual report / presentation for year ended June 30, 2017

# financial nos./ corporate presentation for year ended March 31, 2018, total revenue of Recruit is ~USD 20 bn of which ~2 bn (mentioned above) is HR technology

\*\* As per latest numbers available. Market cap as per average valuation of recruitment business by analysts.

\*\*\* Some of the companies may be operating in other businesses, so the market cap numbers are not necessarily comparable

# 99acres

**99acres**  
India's No.1 Property Portal

ALL INDIA ▾

DOWNLOAD APP CUSTOMER SERVICE SELL / RENT PROPERTY HOME LOANS

BUY RENT PROJECTS COMMERCIAL DEALERS

All Residential ▾ Type Location or Project/Society or Keyword

SEARCH MAP SEARCH

Get personalized property suggestions on a single tap

GET IT ON Google Play Download on the App Store

The GSF Mobile Appies Awards Winner 2015 REAL ESTATE CATEGORY

**99acres**  
India's No.1 Property Portal

Get the App

**Al Seeb**  
REAL ESTATE DEVELOPMENT

**BOOK YOUR DREAM ADOBE IN THE HEART**  
of Dubai  
Pay After Handover

**AZIZI**

**INVEST IN DUBAI FOR LUXURY APARTMENTS**  
for Prices contact :  
971562998939

**Spring Valley DEW**

**SPRING VALLEY DEW KATARA HILLS**  
Bhopal  
@ 18.26 lakhs onwards

**avinash NEWCOUNTY**  
Naya Raipur  
279 Bungalows / 416 Apartments

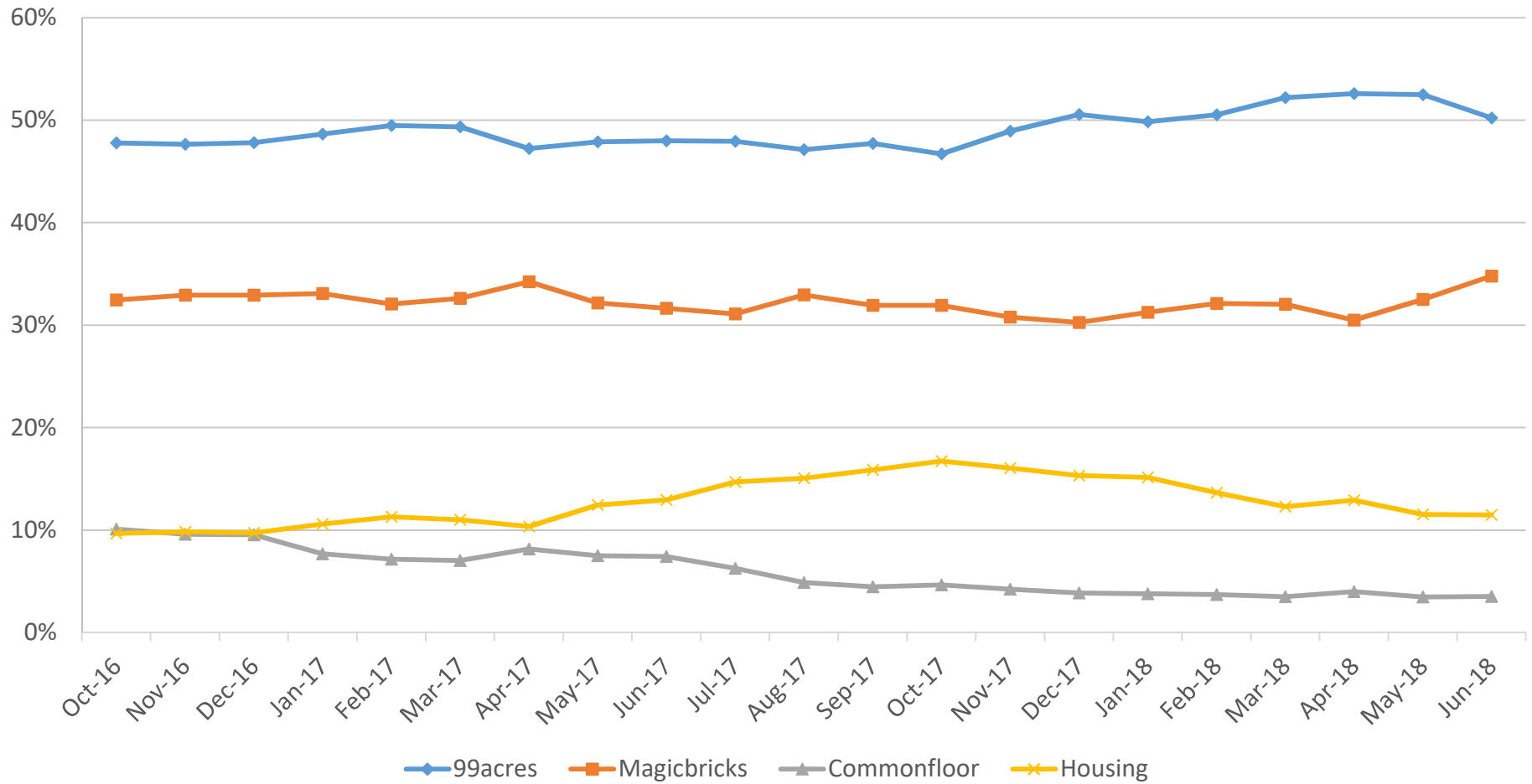
**AVINASH NAYA RA**  
Ready to r  
Apartment

## Online real estate business - India

- Real estate is one of the largest spender on advertising in print media
- Our estimate of spend on online real estate portals is about Rs 3.5-4.0 bn in FY 17-18 (excluding Google and Facebook)
- 99acres, a leader in this category
  - Google, Facebook and local classifieds sites (like Olx and Quikr) also compete for this market
- Access through mobile increasing consistently

# Time share of 99acres vs. competitors

Overall traffic (from desktops & laptops and web mobile) based on time spent



Source: SimilarWeb

# 99acres business model



## Revenue Model

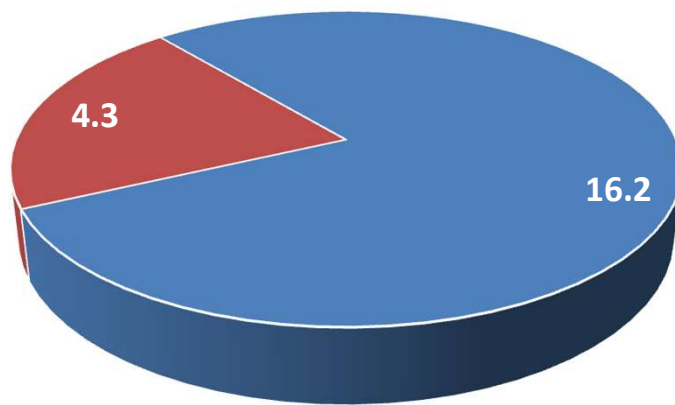
- Projects
  - Listings
  - Featured listings
  - Microsites
  - Email campaigns
  - Banner Ads
- Re-sale
  - Listings
  - Featured listings
- Rental
  - Listings
  - Featured listings

## Key business metrics for 99acres

- As of June 30, 2018
  - Total projects 155,000+ (under construction or ready-to-move-in)
  - Total listings\*\* 747,000 (including 283,000 owner listings)
    - Residential 624,000
    - Commercial 123,000

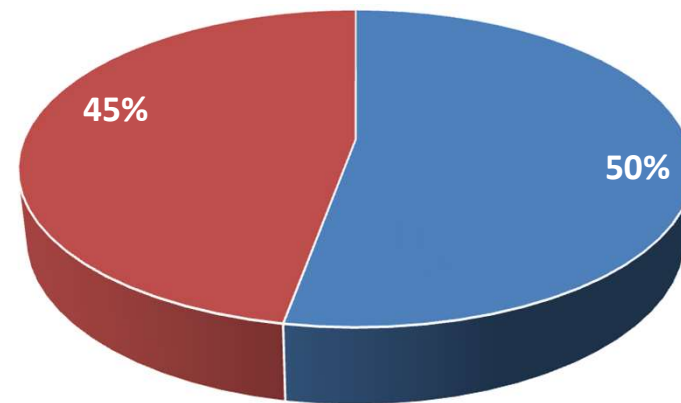
# Break-up of customers and billing in trailing 12 months to June 2018

No. of customers in '000



■ BROKER ■ BUILDER

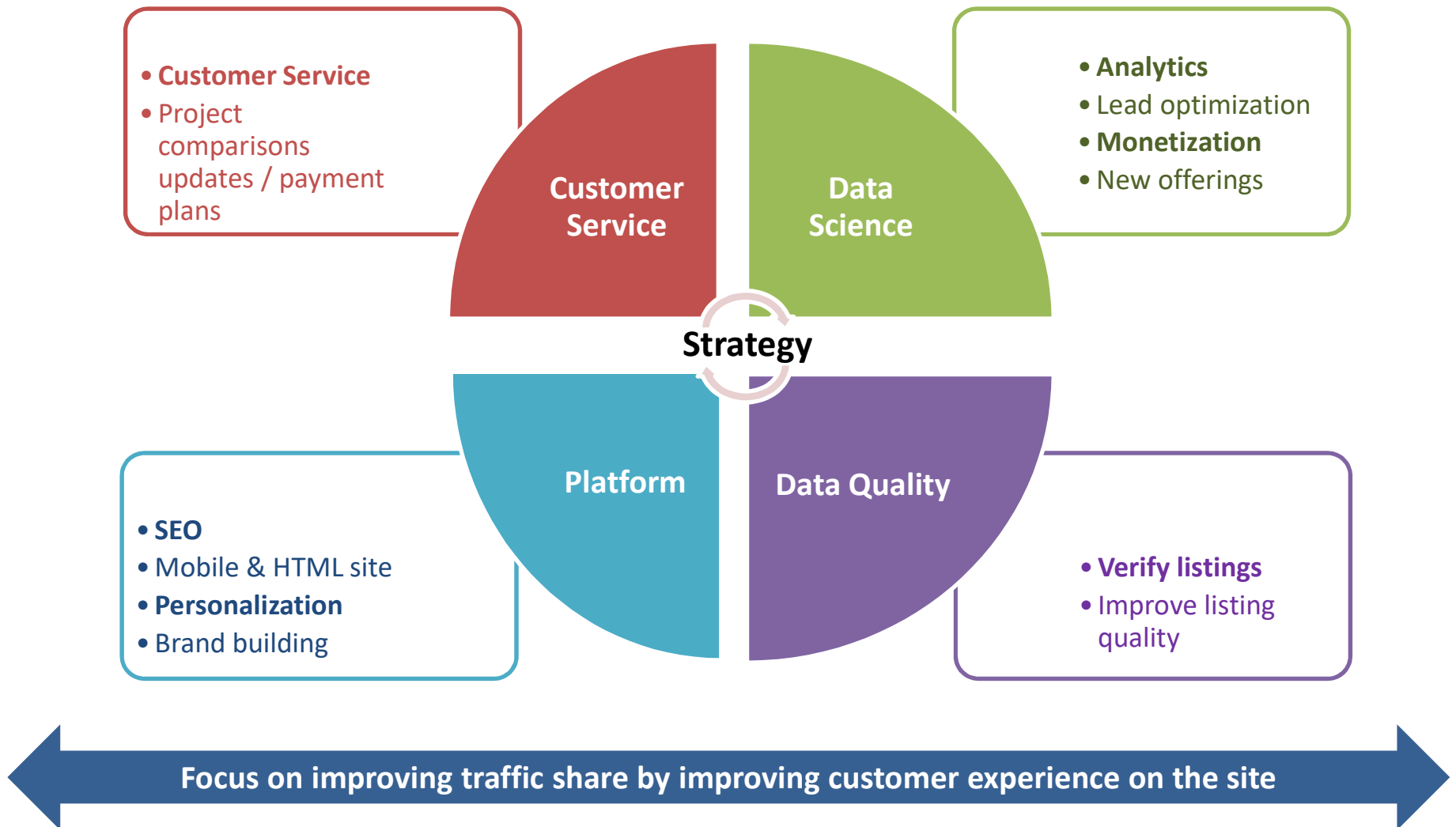
Billing breakup by customer type



■ BROKER ■ BUILDER



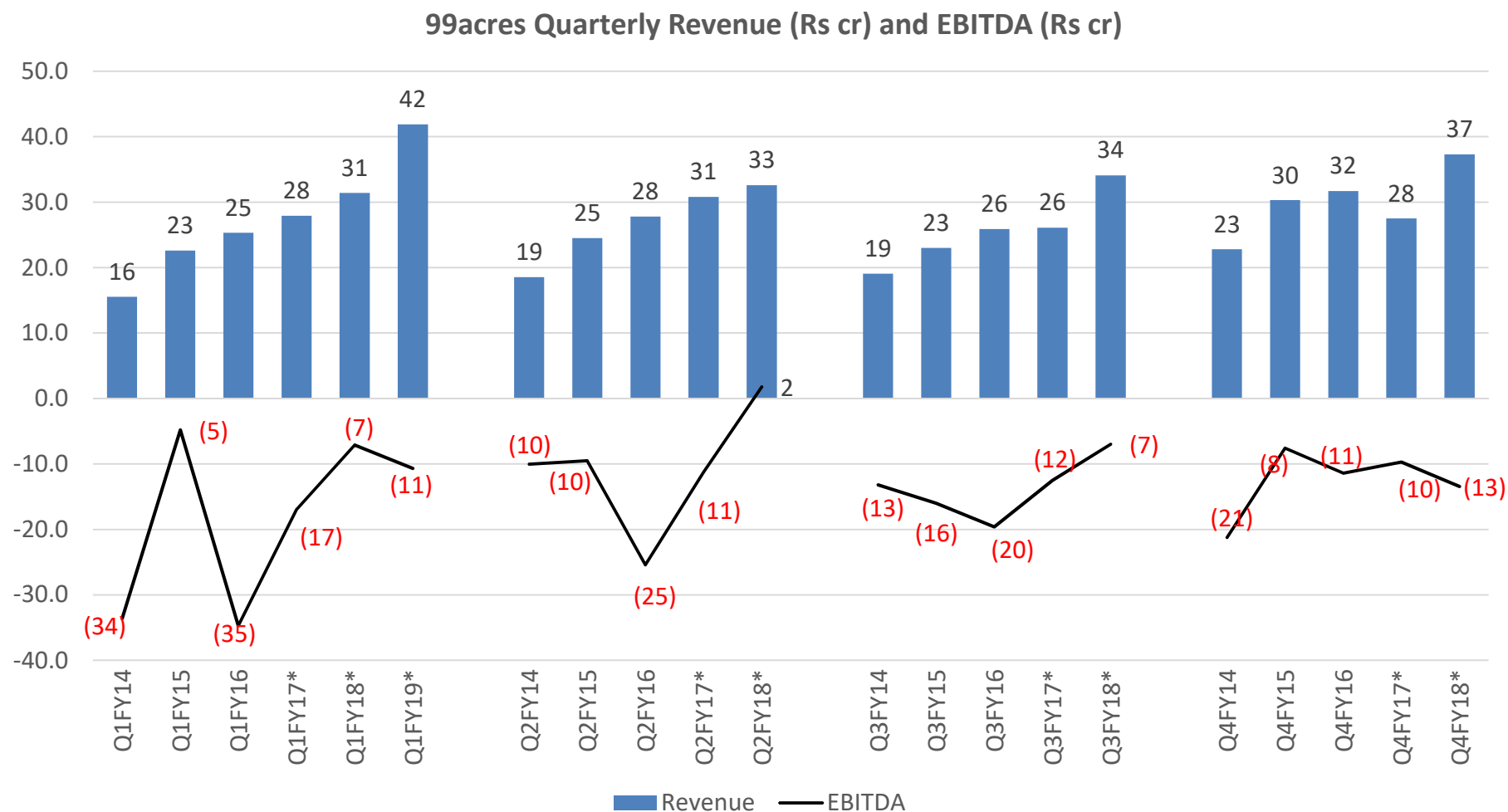
# 99acres –strategy



# Position in the classifieds market

- **Leadership position maintained**
  - We have maintained highest traffic share for 99acres for past several quarters
  - To ensure data quality, innovation and customer retention, we have increased our investments in product / data quality / marketing
- **Listings growth intact amidst poor markets**
  - Listings growth on 99acres has remained intact amidst poor market conditions and events such as demonetization, GST rollout, RERA implementation
  - We believe the worst in real estate is behind us and hope to see the industry do better going ahead
- **Competitive activity has subdued considerably**
  - Competitive activity in real estate online classifieds has reduced considerably
  - Currently only MagicBricks is a sizeable competitor for 99acres, apart from horizontal players like Google and Facebook
    - Housing is owned by Proptiger (an agency business with REA Group investment) and Commonfloor is owned by Quikr. These businesses have limited focus areas of offerings / operations.
- The company continues to have a **war chest** for investment into 99acres and would use it if 99acres requires more investments

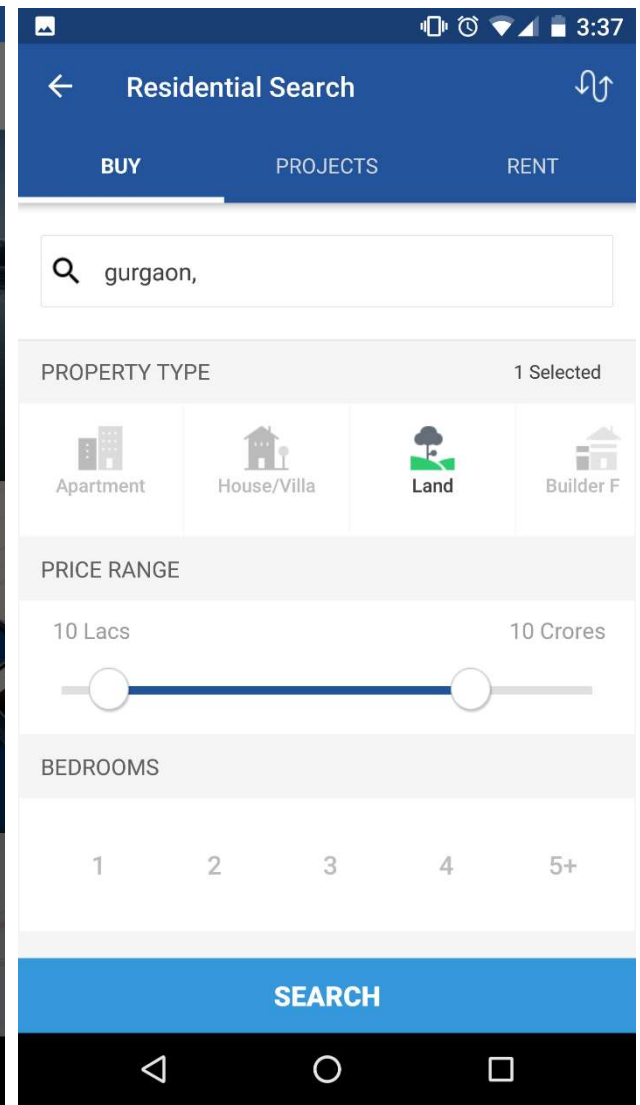
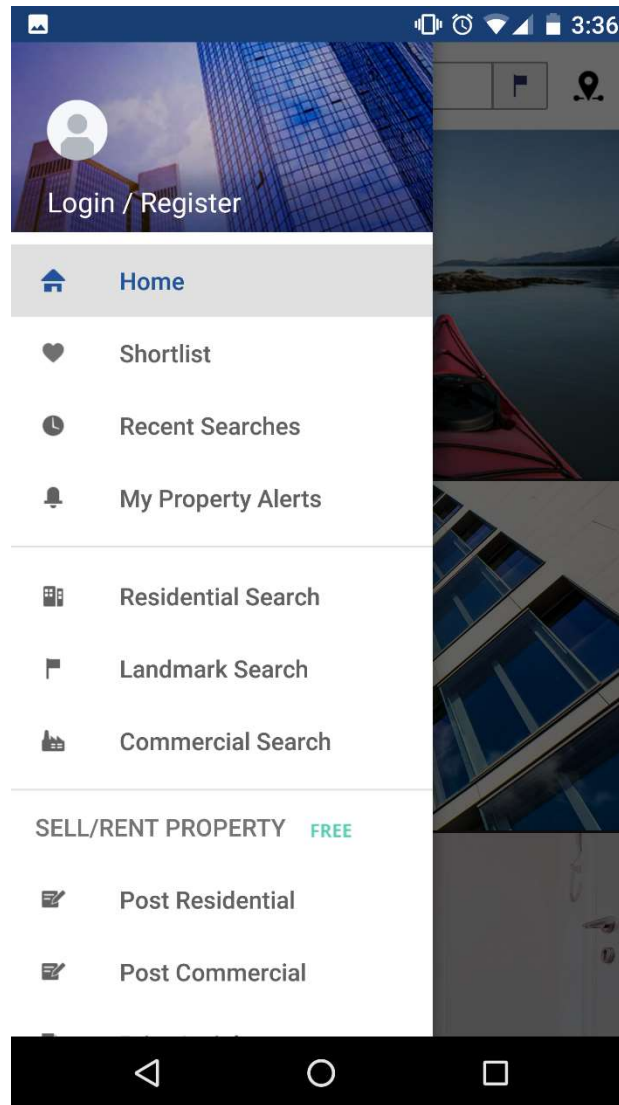
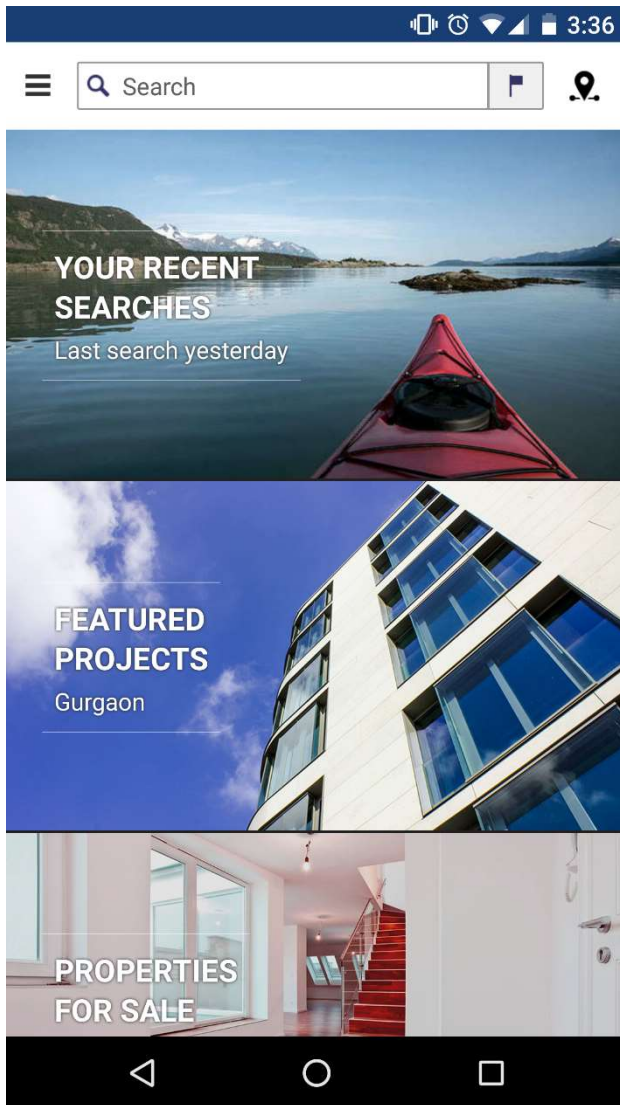
# 99acres Quarterly Financials



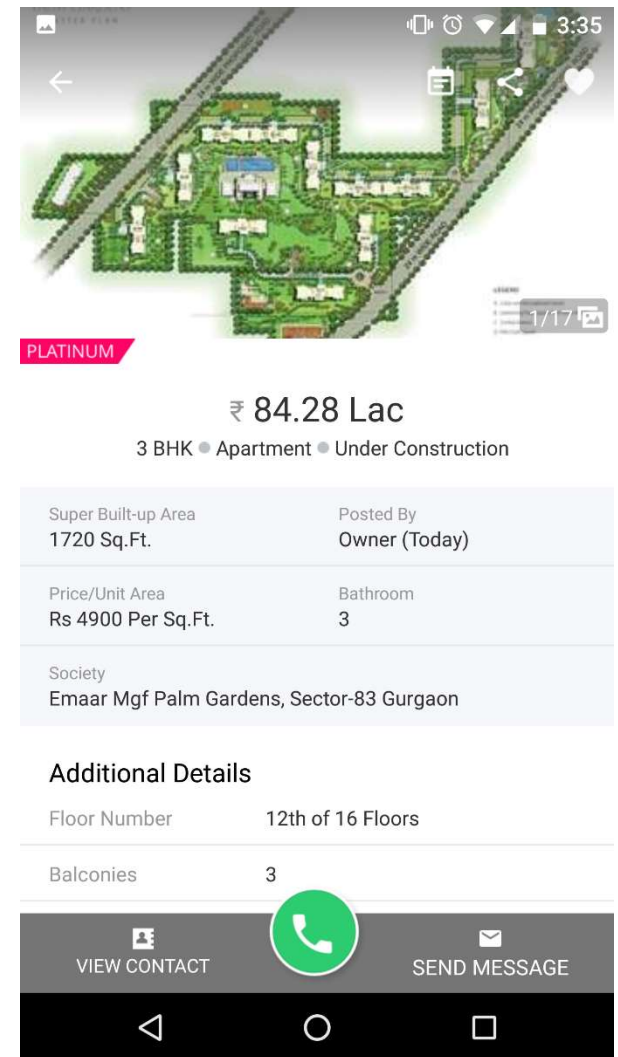
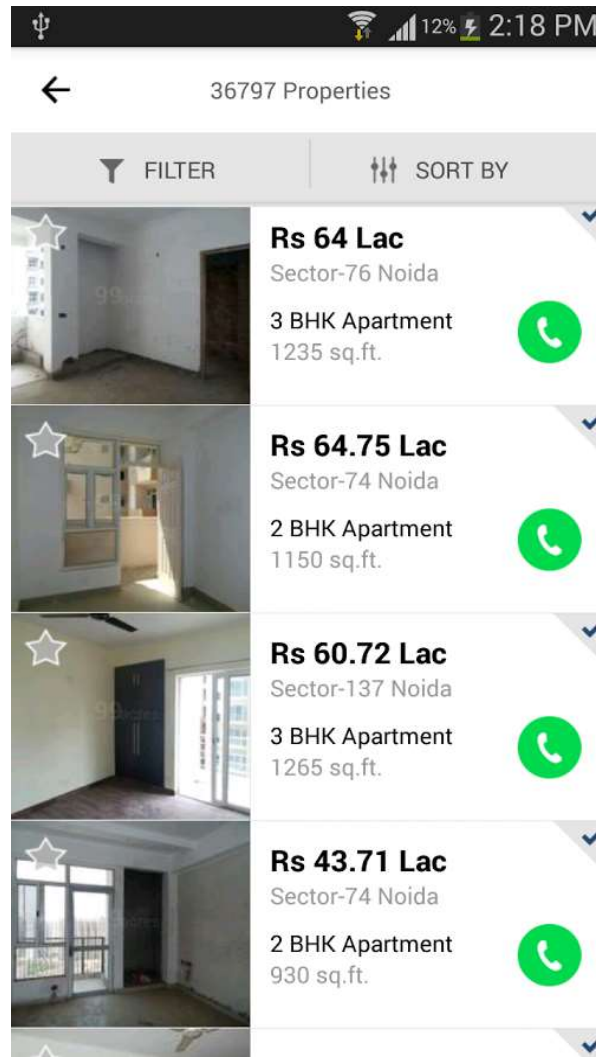
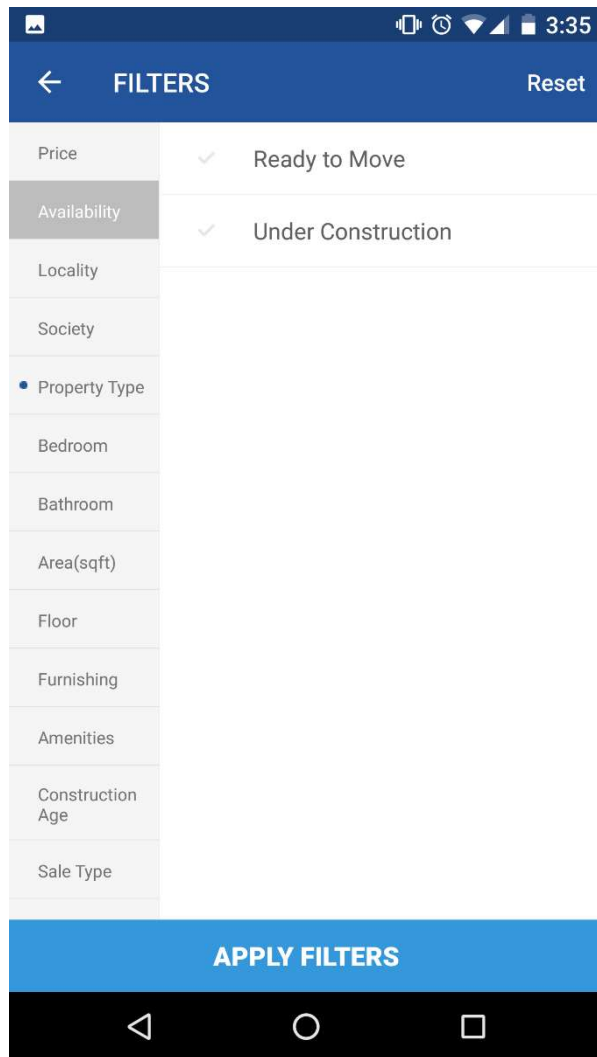
99acres cumulative cash loss (management estimate) at Rs 230 cr

\* Q1FY17-Q4FY18 numbers are EBITDA numbers (adjusted for non-cash ESOP charges) as per IND-AS; All others in I GAAP

# Mobile app – home screen, navigation and search

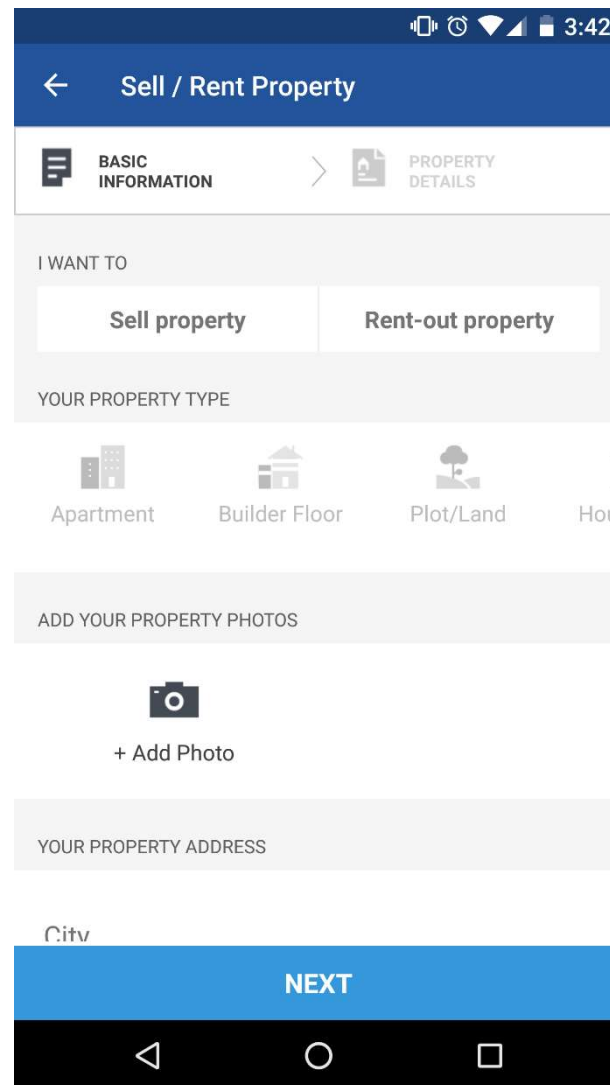
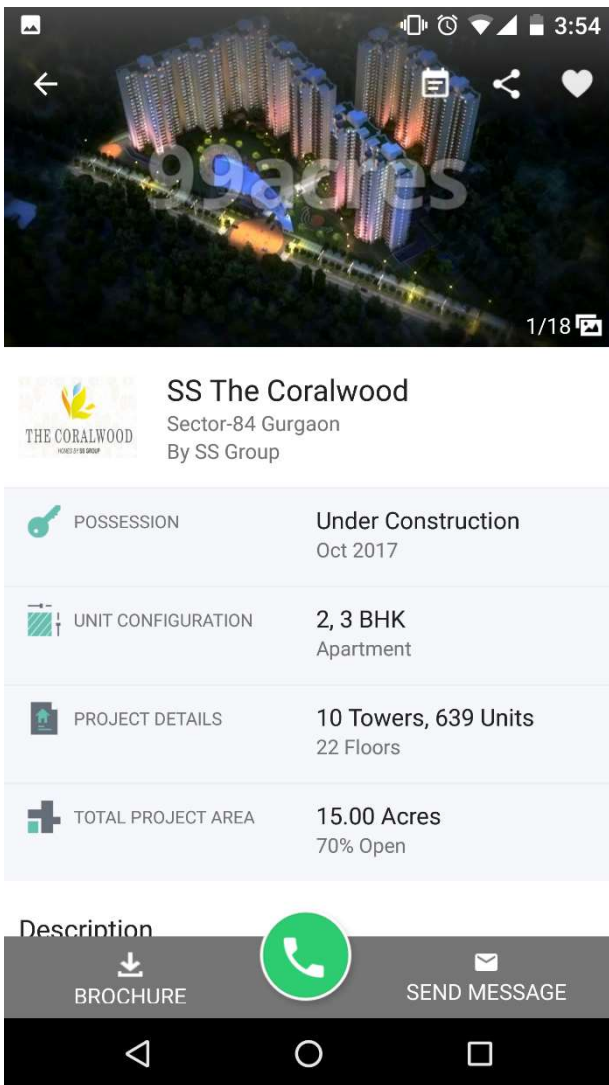
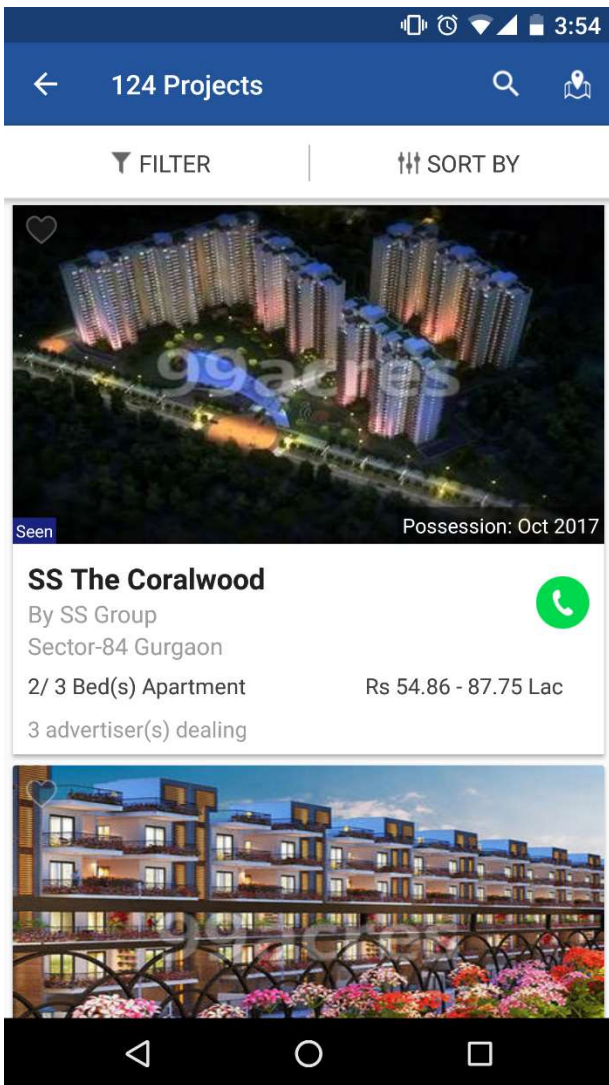


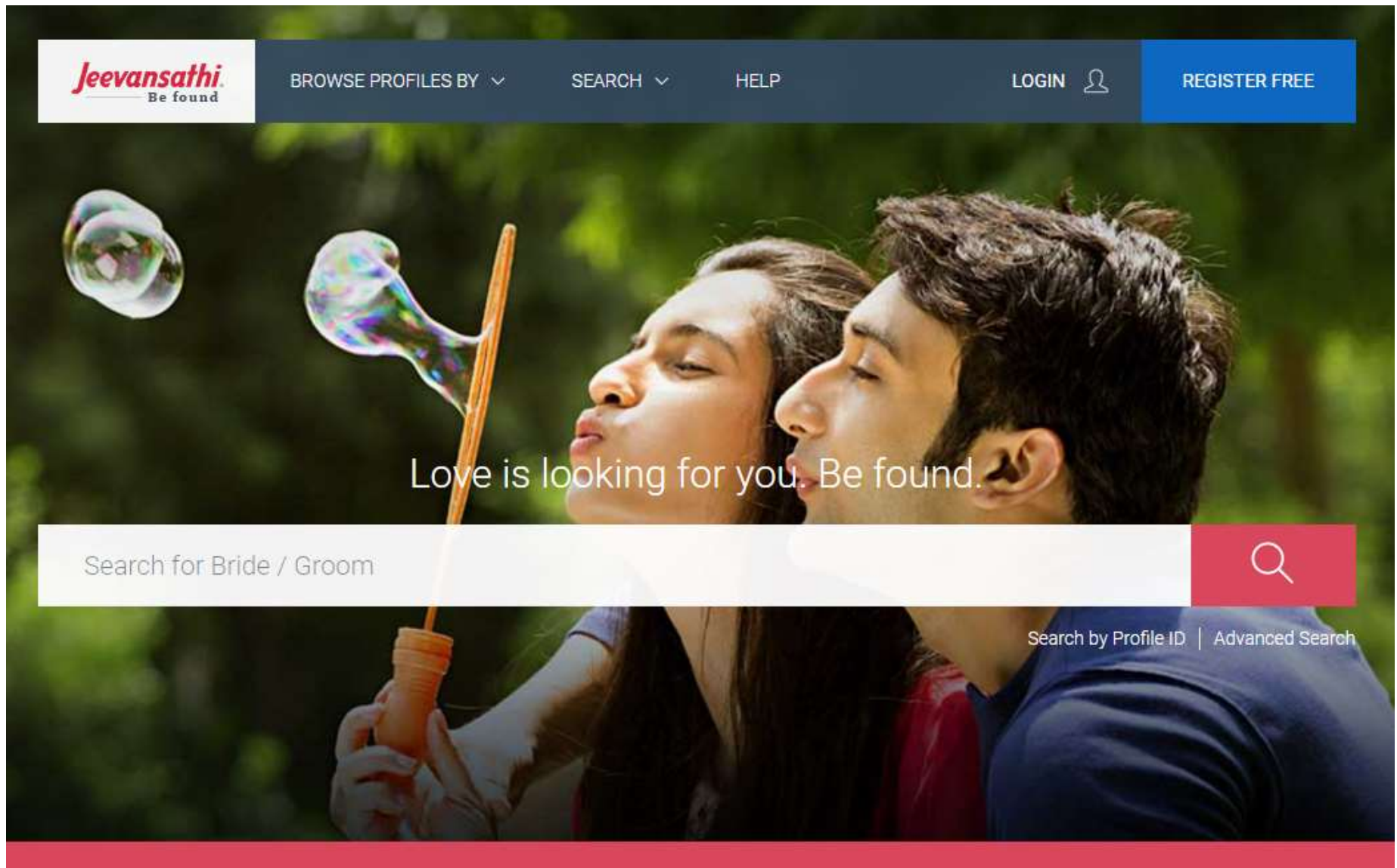
# Mobile app - Property search results page, filter page, property detail page





# Mobile app – project search results page, project detail page and property posting form





# Online matrimonial business - India

- Online spend by users estimated to be ~Rs 6-7 bn in FY 17-18
- Three main players – Bharat matrimony, Shaadi and Jeevansathi
- Used primarily by
  - Those disconnected from mother communities
  - Youngsters looking for choices
  - Families for match-making
- Fragmented market basis
  - Geography
  - Communities (religion, caste, sub castes)



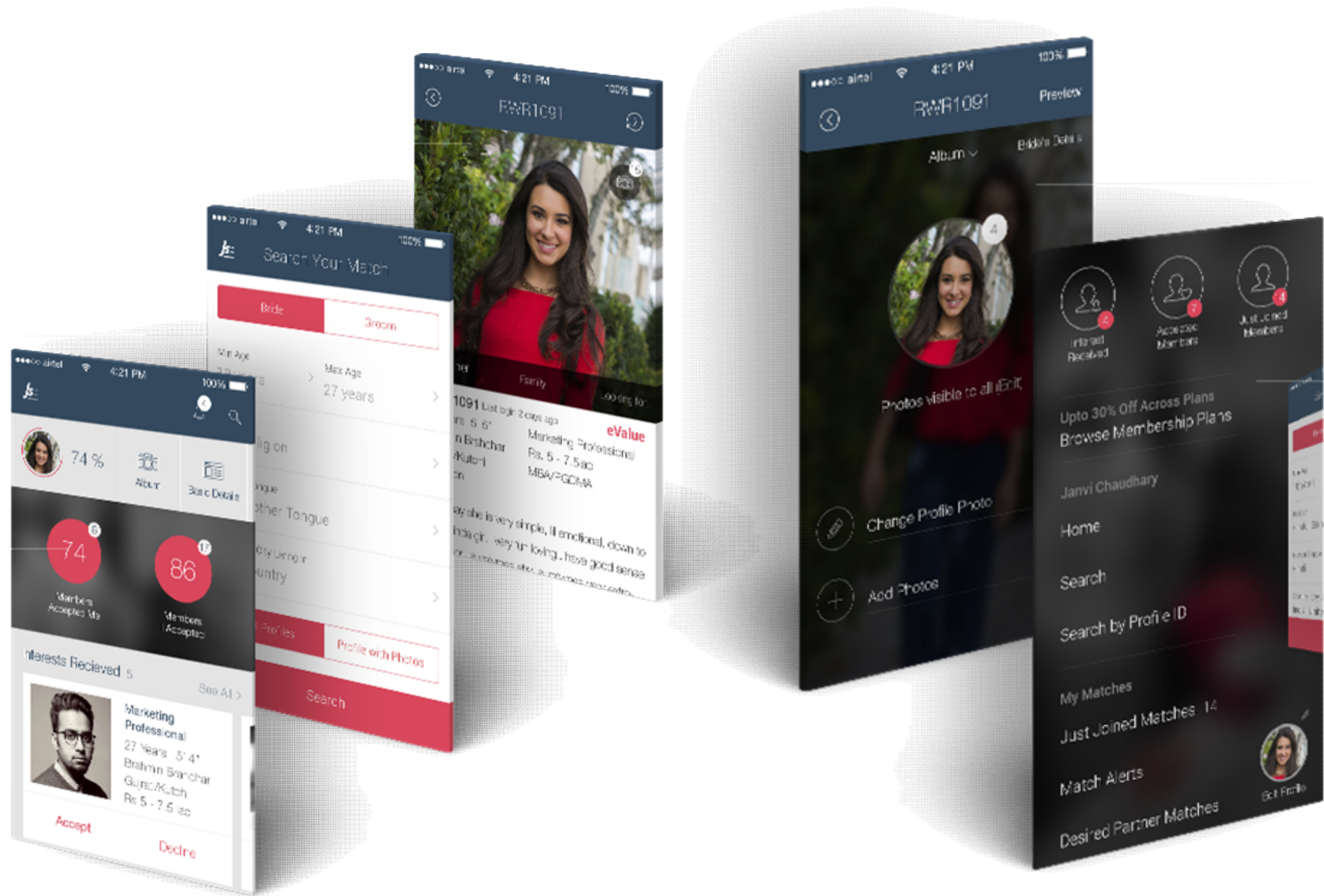
# Jeevansathi business model

- Jeevansathi is a freemium model, wherein
  - Users do not pay for listing, searching, expressing interest and accepting others' expression of interest
  - Payment is required to contact the other person
- Offline centres
  - Walk in sales for matching services
- Franchise - walk in centers

# Competition

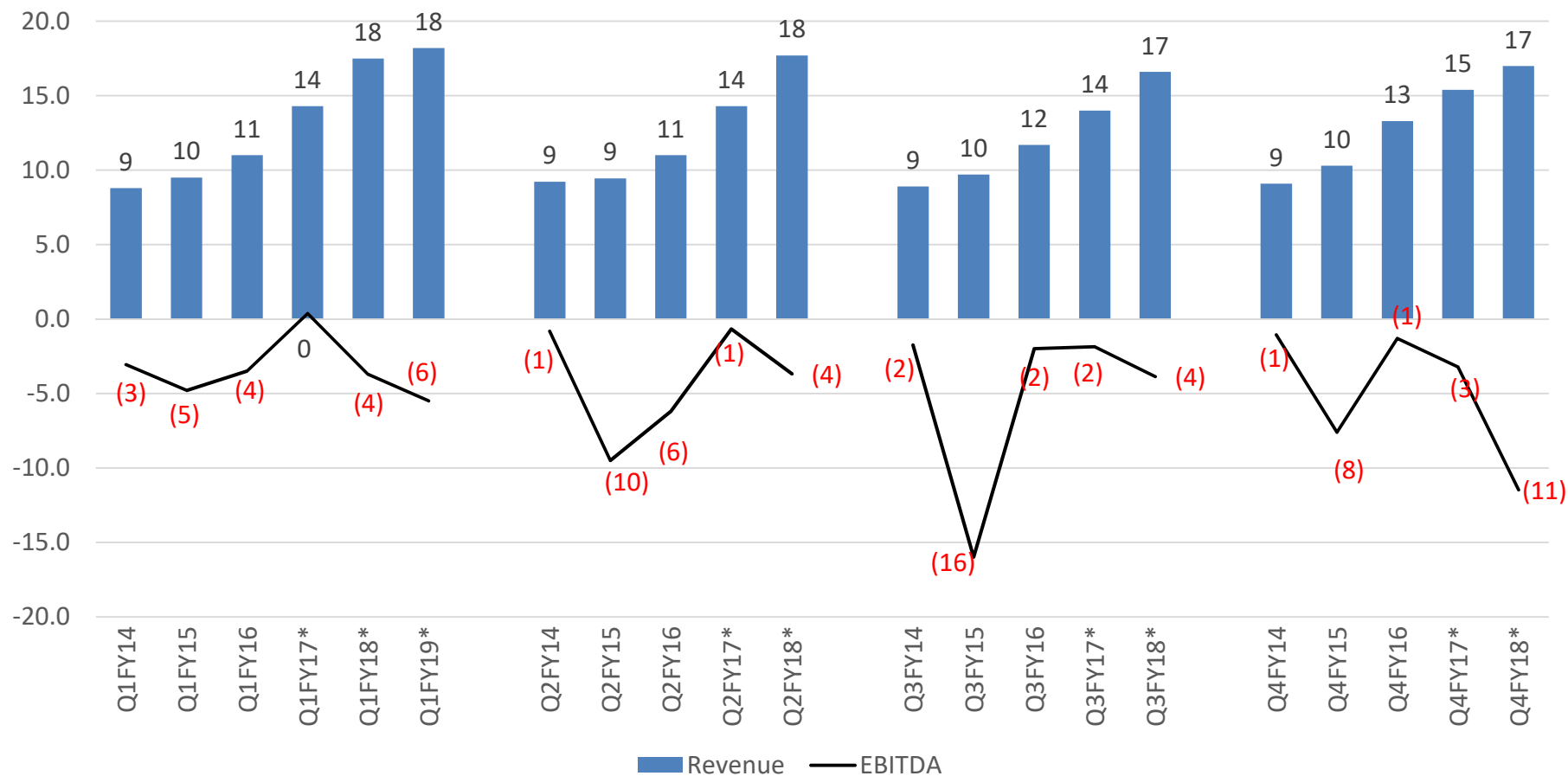
- Three main players – Bharat Matrimony is the leader, followed by Shaadi and then Jeevansathi
- Bharat Matrimony dominates states in south India and non resident Indians from these states
- Shaadi leads in Gujarat and Punjab and non resident Indians from these states
- Jeevansathi leads in certain North Indian communities and states
- There are overlaps in profiles amongst sites

# Mobile app



# Jeevansathi quarterly financials

Jeevansathi Quarterly Revenue (Rs cr) and EBITDA (Rs cr)



Jeevansathi cumulative cash loss (management estimate) at Rs 82 cr

\* Q1FY17-Q4FY18 numbers are EBITDA numbers (adjusted for non-cash ESOP charges) as per IND-AS; All others in I GAAP

# Shiksha

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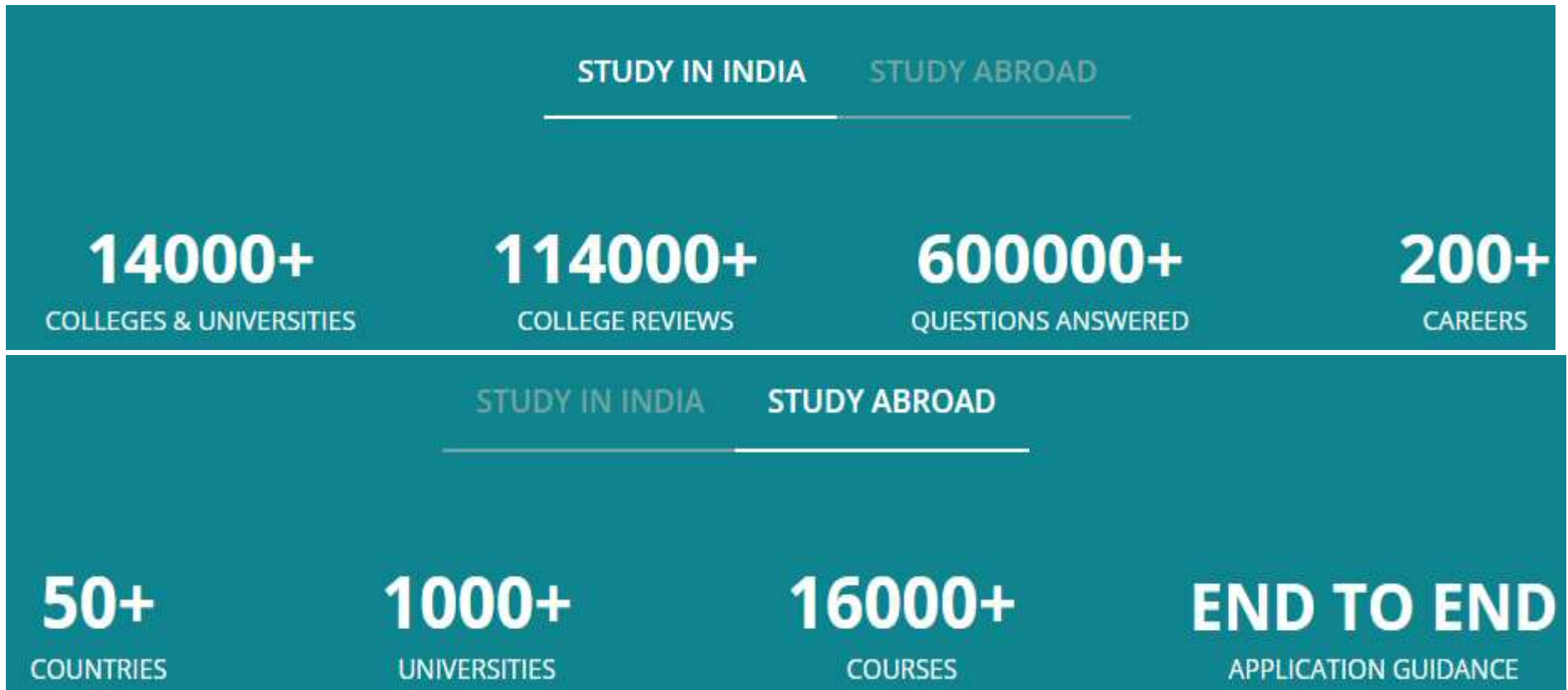
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# Shiksha – some approx. nos.





## Educational classifieds business - India

- Education as a category spends amongst the highest in print
  - Spend in print estimated to be similar to real estate
- Online , School/College contact programs, Consultant commissions & fairs form bulk of remaining marketing spends by colleges and Universities
- Growing number of online players


# Shiksha

A website which helps students decide undergraduate and post graduate options, by providing useful information on careers, exams, colleges & courses

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---


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**COMPARE COLLEGES**

You always have options. Did you choose the right one?



# Shiksha business model

- **Branding & advertising** solution for colleges & universities (UG, PG, post PG)
  - Both Indian and foreign entities advertise
  - Large number of Indian students go overseas for higher education
    - Estimated at ~125,000 + every year
- **Lead generation**
  - Potential student/applicants details bought by colleges and their agents
  - Full counselling service for international university partners
- **Prospective students have free access** to all information on the site (some post registration)

# Authentic College Reviews

## National Institute of Technology, Tiruchirappalli - Reviews (57)

Established 1964 | UGC Approved ⓘ | Deemed University ⓘ

☆ Shortlist

Filter the results

Select course

Sort by

Year of graduation

Sai | Batch of 2019 | Rating 4.6 / 5

👍 Recommends this course

Course reviewed : B.Tech. in Civil Engineering

**Good college with nice placements.**

**Placements :** Compared to other batches, last year's placements were not up to the mark. There are 100 percent placements in CSE, ECE and mechanical. The average package is about 9 LPA for CSE, 8 LPA for ECE & EEE.

**Infrastructure :** Infrastructure is too good and full campus is covered under WiFi. College provides basic facilities like bank, post office, hostel, 24 hours computer center, indoor stadium, etc. inside the campus itself. They have smart classrooms and the classes are air conditioned. Quality of food is decent.

**Faculty :** Faculty is bad so you have to study on your own. Presently, they are using flexible curriculum. They use both chalk and board and smart class methods for teaching. There are 50 students in each section.

Is this review helpful YES | NO

Posted: 09 Nov 2016

**Related university links**

- [Courses Offered](#)
- [Admission Process](#)
- [Questions & Discussions](#)
- [News & Articles](#)

**You may be interested in reviews on**

- [National Institute of Technology, Warangal](#)
- [Indian Institute of Technology, Madras](#)
- [National Institute of Technology, Surathkal](#)
- [National Institute of Technology \(NITC\)](#)
- [Birla Institute of Technology, Mesra](#)

**Search similar college reviews**

🔍

Mallikarjun | Batch of 2018 | Rating 3.2 / 5

👎 Doesn't recommend this course

Course reviewed : B.Arch

**Are you a student or an alumni of this university?**

Compare

# Q&A mobile app for expert advice

Shiksha Ask & Answer  
India's largest education community



# Campus representatives from colleges for credible advice

The screenshot shows the Shiksha website's 'Campus Connect' page. The header features the Shiksha logo on the left and navigation links for MBA, ENGINEERING, DESIGN, OTHER COURSES, STUDY ABROAD, and COUNSELLING in the center. A search icon is on the right, along with 'Log in | Register' links. The main content area has a breadcrumb trail: Home > MBA > Resources > Campus Connect. Below this is the title 'Campus Connect - Ask Current Students before making a college decision'. A large banner image shows a group of diverse students. Overlaid on the image are two columns of text: 'Ask Current Student Directly' with subtext 'Find all about college admissions, placements, campus life & more', and 'Know the Inside-Story' with subtext 'Catch the latest buzz on 400+ colleges & what others are talking about'. At the bottom of the banner is a search bar with the placeholder text 'Search by college name to ask or view questions' and a search icon.

shiksha

MBA ENGINEERING DESIGN OTHER COURSES STUDY ABROAD COUNSELLING

Log in | Register

Home > MBA > Resources > Campus Connect

Campus Connect - Ask Current Students before making a college decision

**Ask Current Student Directly**  
Find all about college admissions, placements, campus life & more

**Know the Inside-Story**  
Catch the latest buzz on 400+ colleges & what others are talking about

Search by college name to ask or view questions

# Home page for Overseas Education

**shiksha**  
STUDY ABROAD

Signup Login

Home Bachelors Masters Countries Application Process Enter Institute or Course Name Study in India

### Start your college search

**1. CHOOSE A COURSE**

MBA  MS  BE/Btech

Or select from more courses

**2. CHOOSE STUDY DESTINATION**

Choose Country

**More options**

Any Exam Any Score

Any fees Sort by Sponsored

**Continue**

### Most viewed Courses

In USA	In Canada	In Australia	In UK
Harvard University Cambridge, USA	Memorial Universi ... St. John's, Canada	Kaplan Business S ... Adelaide, Australia	King's College Lo ... London, UK



# Comprehensive Scholarship information for study abroad

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STUDY ABROAD

Signup Login

Home Bachelors Masters Countries Application Process Enter Institute or Course Name Study In India

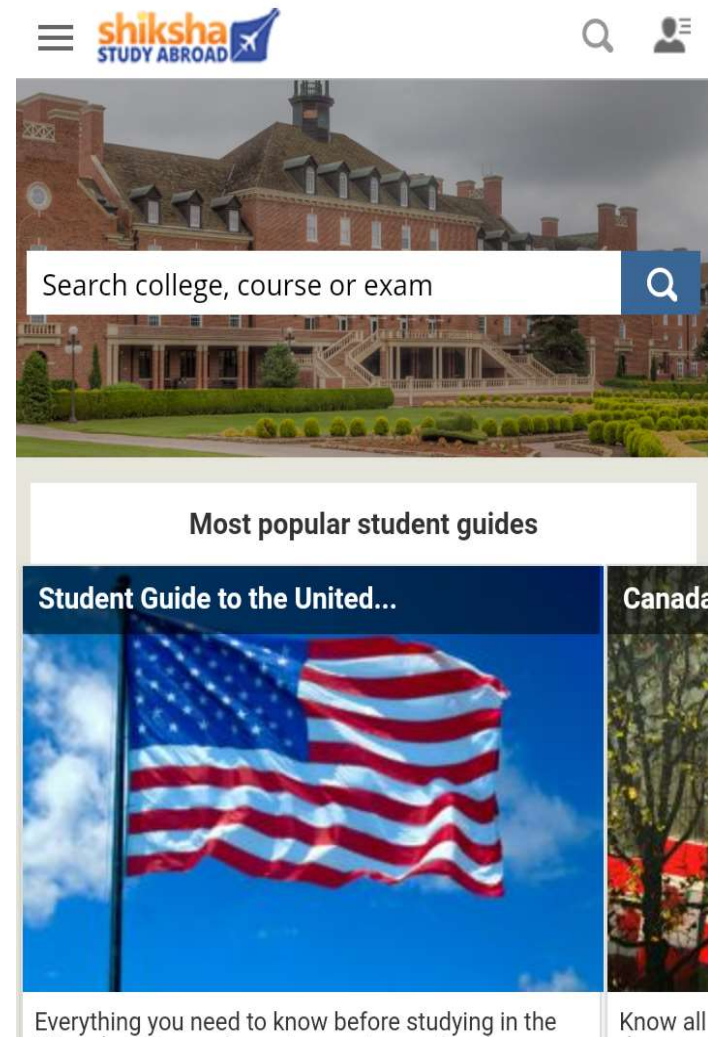
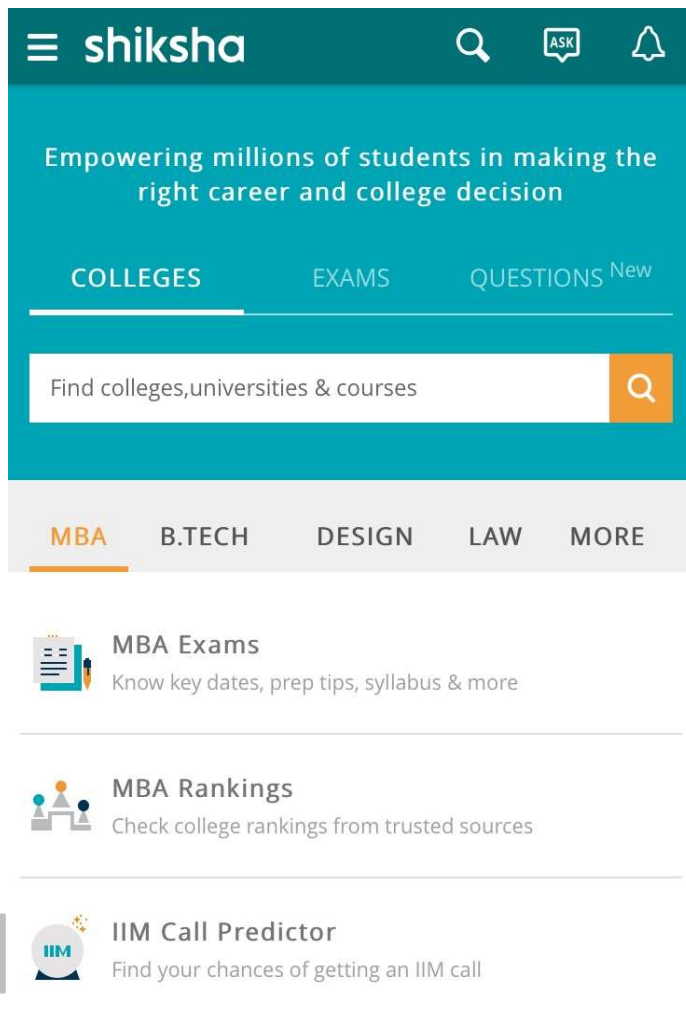
The most comprehensive study abroad scholarships  
1766 Scholarships, 11 Countries, Rs 3063 crores in total amount

Course Level Course Stream Study Destination Find Scholarships

Suggest a missing scholarship, win Rs 500!

Explore Scholarships by Country

# Mobile sites



# Competition

## Domestic

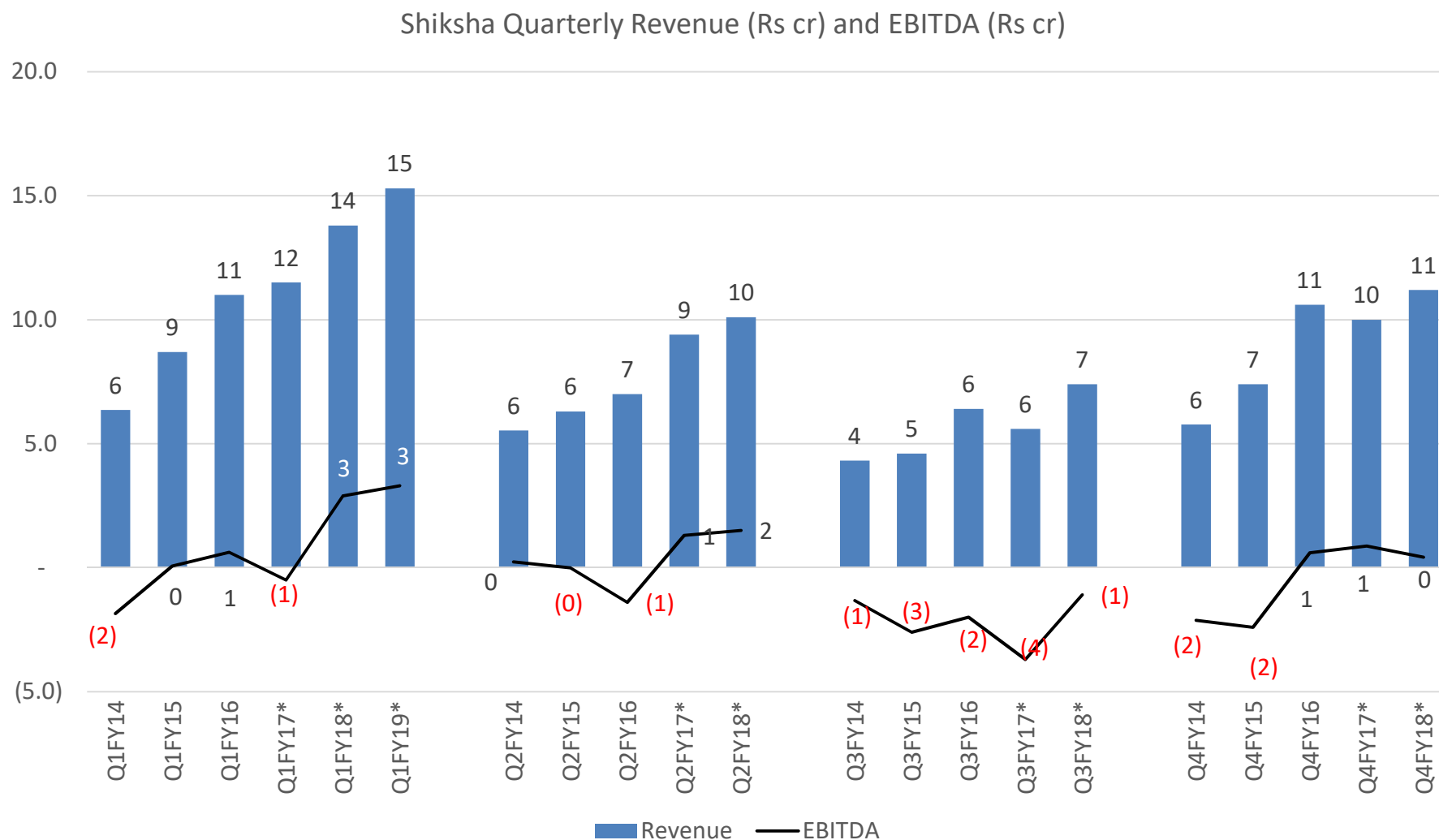
- Print Media
- Online
  - Google
  - Pagalguy
  - HTcampus
  - Minglebox
  - Careers360
  - MBA Universe
  - CollegeDekho
  - CollegeDunia
  - Sarvgyan
  - Aglasem
  - Others

## Study abroad

- Online
  - HotCourses India/ IDP
  - Studyportals
  - Masterstudies
  - Top mba / Top universities (QS)
  - Collegeboard
  - Yocket
  - Multiple Emerging start-ups
- Study Abroad consultants



# Shiksha quarterly financials



Shiksha cumulative cash loss (management estimate) at Rs 42 cr

\* Q1FY17-Q4FY18 numbers are EBITDA numbers (adjusted for non-cash ESOP charges) as per IND-AS; All others in I GAAP

# Investee companies

# Portfolio of investment in start-ups

Investee Company	Website	Book Value of Investment (Rs cr)	% Holding on fully diluted basis
<b>Active</b>			
Zomato Media Pvt Ltd.	<a href="http://www.zomato.com">www.zomato.com</a>	*152	*30.9%
Applct Learning Systems Pvt Ltd.	<a href="http://www.meritnation.com">www.meritnation.com</a>	135	65.7%
Etechaces Marketing and Consulting Pvt Ltd.	<a href="http://www.policybazaar.com">www.policybazaar.com</a>	**389	**13.6%
Happily Unmarried Marketing Pvt Ltd.	<a href="http://www.happilyunmarried.com">www.happilyunmarried.com</a>	26	47.2%
Mint Bird Technologies Pvt Ltd.	<a href="http://www.vacationlabs.com">www.vacationlabs.com</a>	6	26.1%
Rare Media Company Pvt Ltd.	<a href="http://www.bluedolph.in">www.bluedolph.in</a>	11	43.9%
Unnati Online Pvt Ltd	<a href="http://www.unnatihelpers.com">www.unnatihelpers.com</a>	4	31.6%
VCare Technologies Pvt Ltd.	<a href="http://www.diolabs.com">www.diolabs.com</a>	4	15.1%
Ideaclicks Infolabs Pvt. Ltd.	<a href="http://www.zippserv.com">www.zippserv.com</a>	5	45.3%
Wishbook Infoservices Pvt. Ltd.	<a href="http://www.wishbooks.io">www.wishbooks.io</a>	4	25.7%
NoPaperForms Solutions Pvt.Ltd.	<a href="http://www.nopaperforms.com">www.nopaperforms.com</a>	6	39.9%
International Educational Gateway Pvt. Ltd	<a href="http://www.univariety.com">www.univariety.com</a>	13	31.4%
Agstack Technologies Private Limited	<a href="http://www.gramophone.in">www.gramophone.in</a>	6	27.8%
Bizcrum Infotech Pvt. Ltd.	<a href="http://www.shoekonnnect.com">www.shoekonnnect.com</a>	3	21.4%
Printo Document Services Pvt. Ltd.	<a href="http://www.printo.in">www.printo.in</a>	20	23.5%
<b>Sub Total</b>		<b>784</b>	

\* Net of disposal of secondary sale with proceeds of USD 50 mn; Shareholding post the latest round of investment and dilution

\*\* Represents effective economic interest held by Info Edge directly (1.3%) and indirectly through subsidiary companies – in partnership with Temasek (7.9%) and Softbank (4.4%); The amount represents Info Edge's net investment; The Softbank transaction is in progress and subject to regulatory approvals.

Written off / provisioned investments – Studyplaces, 99Labels, Nogle Technologies, Canvera Digital, Kinobeo Software Pvt. Ltd. (Mydala) and Green Leaves Consumer Services (Bigstylist). Total amount written off is Rs 201 crore.

# Investee companies financials

Rs. Crore

Investee Company	Operating revenue						Operating EBITDA					
	FY13	FY14	FY15	FY16	FY17	FY18	FY13	FY14	FY15	FY16	FY17	FY18
<b>Partly owned subsidiary</b>												
Meritnation	10	20	22	29	36	31	(21)	(29)	(23)	(42)	(23)	(13)
Canvera	30	44	54	56	49	42	(21)	(33)	(22)	(33)	(27)	(25)
<b>Associate Companies</b>												
Zomato												
PolicyBazaar												
Mydala												
Happily Unmarried												
Vacation Labs												
BigStylist												
Nopaperforms	68	127	255	390	579	865	(38)	(55)	(189)	(607)	(213)	(149)
Wishbook												
Univariety												
Gramophone												
Rare Media												
Unnati												
Diro Labs												
<b>Total</b>	<b>108</b>	<b>191</b>	<b>331</b>	<b>475</b>	<b>664</b>	<b>937</b>	<b>(80)</b>	<b>(117)</b>	<b>(234)</b>	<b>(682)</b>	<b>(263)</b>	<b>(188)</b>

\* FY16 - FY18 numbers are based on IND AS vs. I GAAP earlier

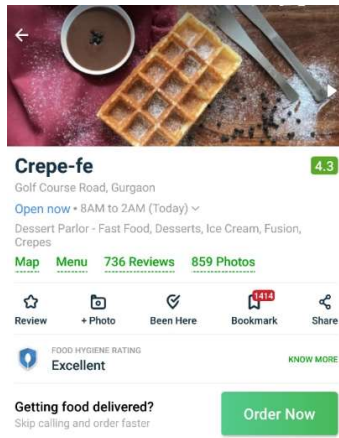
# Zomato



# Zomato is world's leading restaurant search, discovery and transaction platform

## Zomato has three key businesses

### 1. Listings & Reviews



- Launched in 2008
- Present in 24 countries
- 1.3m+ high quality restaurant listings with up to date scanned menus, photos and user reviews

Largest restaurant reviews & ratings platform

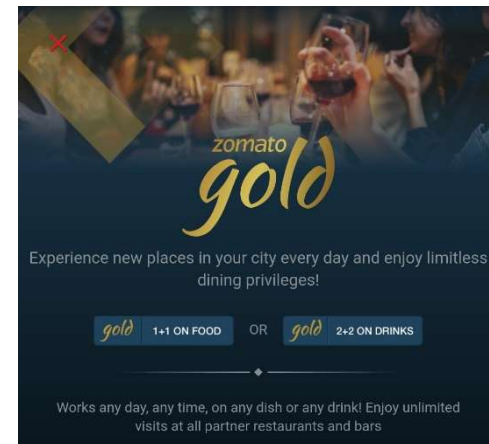
### 2. Food Delivery



- Launched in 2015
- Present in India and Middle East
- Hybrid delivery model – combination of self fulfilled and restaurant fulfilled orders

One of the leading food delivery players

### 3. Subscription Programs



- Launched in 2017
- India and international presence
- Privileged membership programs; privileges are funded by restaurants

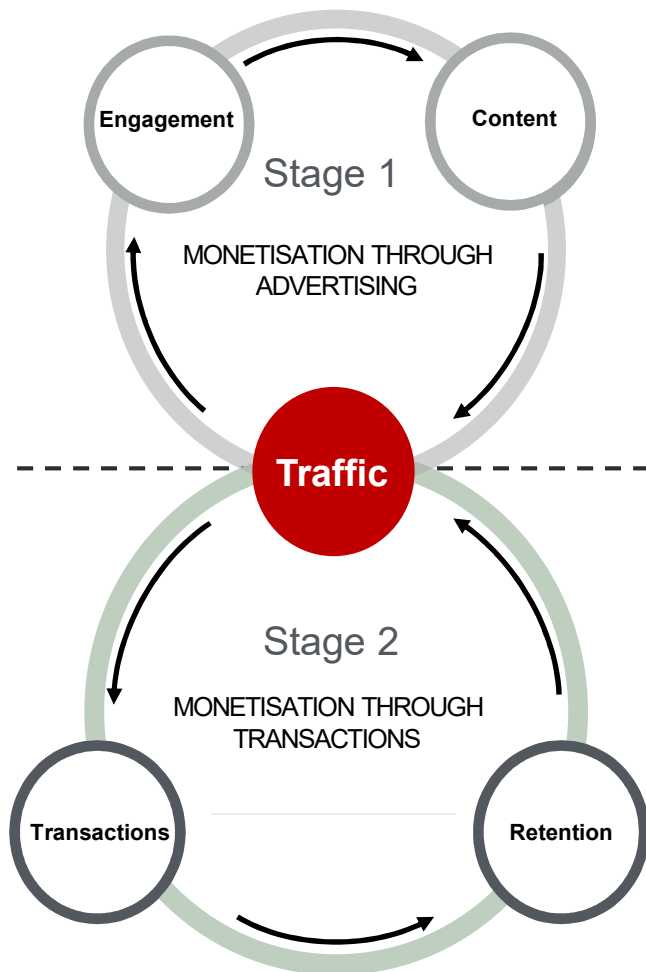
One of its kind, unique membership program

Other key investors in Zomato – Alipay, Sequoia, VY Capital and Temasek



# Growth is fuelled by two self feeding “flywheels”, that define Zomato’s unique business model

Multiple use cases across dining-out and food delivery result in strong network effects



## STAGE 1 – LISTINGS AND REVIEWS

- ✓ High quality, exhaustive restaurant listings (*using a combination of tech and human output*) yield large organic traffic
- ✓ Users engage with the platform to write reviews and upload photos - further enriching our content

## STAGE 2 - TRANSACTIONS

- ✓ Traffic from search/recommendations product naturally drives transactions off-take, without having to spend on marketing and discounts
- ✓ Users who transact on Zomato visit us more often than users who don't - further increasing traffic and hence adding back to the first flywheel

# Highly interactive platform ensures high user and restaurant engagement



## Bookmark

Retrieval of favorite places with a single click

## Social Feed

Latest updates from friends and foodies

## Reviews & Ratings

Description and rating of user experiences

## Photos

High quality user generated content

## Menus

Comprehensive and updated menus

## Customized Collections

Trend-based, curated group of restaurants

## Advanced Search

Multi-dimensional filters for targeted search

Users can also order food and reserve tables at restaurants with a click of a button



# PolicyBazaar

**policybazaar.com**  
Compare. Buy. Save.  
An ISO 27001:2013 certified company

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## India's Best Insurance Destination

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- Health
- Life Insurance Investment
- Car
- Two Wheeler
- Travel
- Term Life 100yrs+ (New)
- Child Plans
- Retirement Solutions
- Guaranteed Plans
- Zero Commission Investment Plans
- Home Insurance

Also See : [Group Mediciam](#) [Corporate Insurance](#) [Cancer](#) Group Companies : [Free CIBIL Score \(Paisabazaar\)](#) [Etechaces](#)

# PolicyBazaar

- PolicyBazaar is India's online price comparison site for insurance
  - Significant value add to individuals and Financial Institutions for policy related decision-making
- A leader in its category
  - Captures an estimated 90% share of insurance comparison & 50% of online Insurance transactions
- Huge potential in the market
  - Currently less than 4% of the Indian population is insured
- Other key investors in Policybazaar include – Tiger Global, Temasek, Softbank

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## Our students love us



“ Meritnation is just simply Awesome!! :) A lot of my problems get solved when i come here..greatly blessed to have this.I have now started improving in my studies now. Thank you so much! ”

Sanchita Verma, Class X  
Apeejay School



“ It gives me immense pleasure to inform you that I have got 96.5% in Class 12 Board Exams(Science). Meritnation has helped me a lot in getting 97 in Maths and 99 in economics, not to forget chemistry and english, in which I got 95 marks. From ... [Read more](#) ”

Joyjit Chatterjee, Class XII



“ I find it really easy and interesting to study on meritnation. The animations help me in enjoying what I study, which has made my study routine really interesting! ”

Swapnil Lohani, IITJEE Advanced Qualified

# Meritnation

- Supplementary online learning platform for K12 and Entrance Exams
  - Proprietary content
  - Freemium model
  - Direct to consumer
- Provides free solutions mainly for
  - mathematics and science for K12 of popular national Indian curriculum's viz. CBSE and ICSE and some State Boards
  - free solutions restricted to popular text books and user generated content
- Paid product for online assessment and teaching solutions
  - provides resources to kids for self study after school
  - Option for live online tuition classes
- Test prep product for engineering and medical entrance examinations
- Over 10 mn registered users
- ~55-60% sessions through mobile



# Happily Unmarried



## Happily Unmarried

- Grooming range for men “Ustraa”
- Focus on online sales
- Have introduced a women’s range under brand name ‘Happily Unmarried’
- Received funding from Wipro Consumer

# Team

# Management Team

Name	Age	Qualifications	Designation/ Role	Previously worked with	Year of joining
Sanjeev Bikhchandani	55	BA Economics St. Stephens, PGDM IIM-A	Founder and Executive Vice Chairman	Lintas, Glaxo Smith Kline	1995
Hitesh Oberoi	46	B Tech, IIT Delhi, PGDM, IIM-B	Managing Director and CEO	HLL (Unilever)	2000
Deepali Singh	44	B Sc, LLB, Delhi University, PGDBA, IPM	Executive Vice President Firstnaukri	Aptech	2000
Arif Ismail Parker	43	BA	Executive Vice President- Sales	ITNation.com	2000
Vibhore Sharma	44	B Sc, IGNOU	Chief Technology Officer Naukri	Pioneer	2001
Suresh V.	46	BE, Masters in Management, Sathya Sai Institute of Management	Chief Sales Officer - Naukri.com	Xerox	2001
Neeraj Sharma	45	B.Com , PGPM	Executive Vice President- Sales	-	2001
Niraj Kumar Rana	42	BSC, MBA	Executive Vice President- Sales	-	2001
Swati Vashista	40	MBA	Senior Vice President Sales Systems	-	2001
Manoj P	44	BE- University of Mysore MBA - Xavier Institute of Management and Entrepreneurship	Executive Vice President- Sales	Indian Seamless Group	2002
Harveen Singh Bedi	46	PGDBA-Birla Institute of Management Technology	Executive Vice President Quadrangle & Ehire	Nestle	2002
Satyajit Yogeshchandra Tripathi	44	BSc ,PGDBM	Executive Vice President- Emerging Markets, 99acres	-	2002
Ambrish Kumar Singh	44	Btech, MBA	Executive Vice President and Head Sales & Customer Delivery Shiksha	LSI Software, Pentasoft Tech	2003
Ankur Kheterpal	44	B.Com Christ College Bengaluru	Senior Vice President IT Infrastructure	Solutions Infosystems, Wintech Education, Sunrise Consultancy	2005
Meetu Arora	40	PG Diploma, Computer Applications - Acharya Narendra Dev College - New Delhi	Senior Vice President Quality Assurance	Induslogic India Pvt. Ltd. , IBM Global Services, Magic Software Pvt. Ltd.	2006
Sharmeen Khalid	47	MBA, IRMA	Chief Human Resources Officer	Polaris	2006
Shalabh Nigam	46	B Tech, IIT Kanpur	Chief Technology Officer - JS, 99acres	Baypackets	2007
Sumeet Singh	44	BBA, MBA	Chief Marketing Officer	CII	2007
Nishant Pandey	42	B Tech, IIT Delhi, MBA ISB	Executive Vice President and Product Head Shiksha	Schlumberger	2008
Rinchan Gupta	40	BE - Comp Science	Senior Vice President User experience and Design	HP India	2008
Vivek Jain	44	B Tech, IIT Delhi, PGDM, IIM – B	Business Head – Shiksha, Naukri FF and Learning	Isoft, Adobe, IBM, ICICI Securities	2010

About 10% of the total employees are covered under ESOP



# Management Team

Name	Age	Qualifications	Designation/ Role	Previously worked with	Year of joining
Maneesh Upadhyaya	40	B Sc, MBA, FMS, Delhi University	Business Head – 99acres	Bain & Co.	2010
Amit Kumar Singh	41	Btech - IIT Kanpur, PGDBM - IIM Calcutta	Executive Vice President - Product Development	Adobe Systems, Citibank	2011
Jai Prakash Sharma	43	MBA Sikkim Manipal University	Senior Vice President Technical Operations	AOL Online, First Advantage, Adobe Software	2011
Rohan Mathur	34	PGDM Business Management, IIM Ahmedabad	Senior Vice President & Business Head Jeevansathi	Cadence Design Systems, Mindtree	2011
Murlee Manohar Jain	40	Bcom, CS	Associate Vice President- Secretarial & CS	Apollo Tyres	2013
Chintan Arvind Thakkar	51	CA	CFO	Computer Associates	2014
Pankaj Jain	43	B.Tech - IIT Delhi, MS- Stanford University	Executive Vice President- Key Projects	Spice Online Retail, Spice Televentures, Taxila, Siebel Systems	2014
Shailesh Chandra	44	BE - Delhi College of Engg, PGDBM- IIM A	Product Operations Naukri, 99acres, JS, Shiksha	Amazon, Genpact, Indian Railways, Maruti Udyog, Indian Petrochemicals	2014
Atul Kumar	41	BE – Nagpur University; MBA – FMS	SVP and Delivery Head, Naukri FF	Citibank, Whirlpool, Standard Chartered	2015
Niraj Seth	47	B.Tech - IIT Kharagpur	Executive Vice President – Career Site Manager, Naukri	Intuit Inc., Cleartrip.com, Monster.com	2017
Nitin Bansal	41	Btech, Computer Science, IIT Delhi	Executive Vice President	Meritnation.com, Applect Learning Systems, Intel & Hughes Software Systems	2017
Pradeep Kumar Singh	40	Btech, IET Lucknow; Lucknow University; Mtech IIT Roorkee	Executive Vice President	Amazon, Adobe Systems, Novell Inc.	2017
Nitendra Rajput	43	BE, Govt. Engg College, Jabalpur; Rani Durgavati University	Senior Vice President Analytics	IBM Research	2017
Arvind Heda	41	BE (Honours), MREC; Rajasthan Technical University	Executive Vice President, Engineering – Tech Naukri	Snapdeal	2017
Rajesh Kumar Aggarwal	46	CA (ICAI), CS (ICSI), B.Com (Hons) from SRCC	Senior Vice President – Finance	Citigroup, Ranbaxy, E&Y, Genpact, BDO Lodha & Co.	2017
Vivek Aggarwal	40	B.Com(H) – DU, CA	Senior Vice President - Finance	Olam, Bharti Cellular, Genpact, HCL	2018
Aditya Kumar Agrawal	38	M.C.A, DU, IIT Roorkee	Senior Vice President – Engineering – Naukri technology	EROS Digital, Sanpdeal, Syncapse, MarketShare, Guruji.com, BEA Systems	2018
Rishi Gupta	37	Punjab University	Senior Vice President and Head Technology - Jeevansathi	Snapdeal, PayTM, one97, SAP	2018

About 10% of the total employees are covered under ESOP

# Banks/ brokerages that cover us

Firm	Analyst	Phone Number	E-mail
Ambit	Vivekanand Subbaraman	+91.22.3043 3261	<a href="mailto:vivekanand.s@ambit.co">vivekanand.s@ambit.co</a>
B&K Securities	Sushil Sharma	+91.22.4031 7117	<a href="mailto:sushil.sharma@bksec.com">sushil.sharma@bksec.com</a>
BAML	Sachin Salgaonkar	+91 22 6632 8667	<a href="mailto:sachin.salgaonkar@baml.com">sachin.salgaonkar@baml.com</a>
Centrum Broking	Ankit Kedia	+91.22.4215 9634	<a href="mailto:ankit.kedia@centrum.co.in">ankit.kedia@centrum.co.in</a>
Citigroup	Gaurav Malhotra	+91.22.6631 9885	<a href="mailto:gaurav.a.malhotra@citi.com">gaurav.a.malhotra@citi.com</a>
CLSA	Ankur Rudra	+91.22.6650 5059	<a href="mailto:ankur.rudra@clsa.com">ankur.rudra@clsa.com</a>
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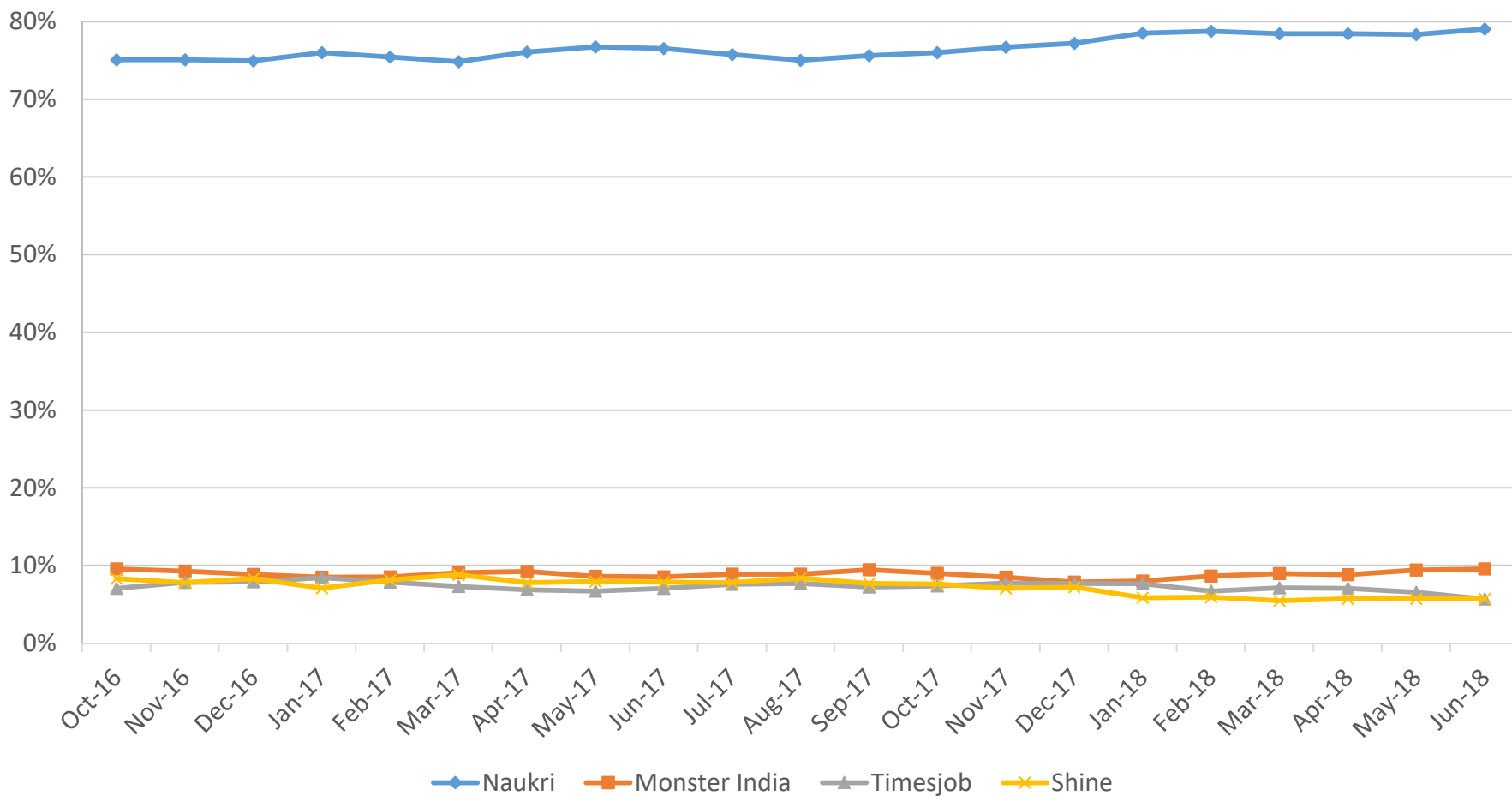
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# Annexures

# Naukri has dominant traffic share

Traffic from desktops and laptops based on time spent – excluding indeed

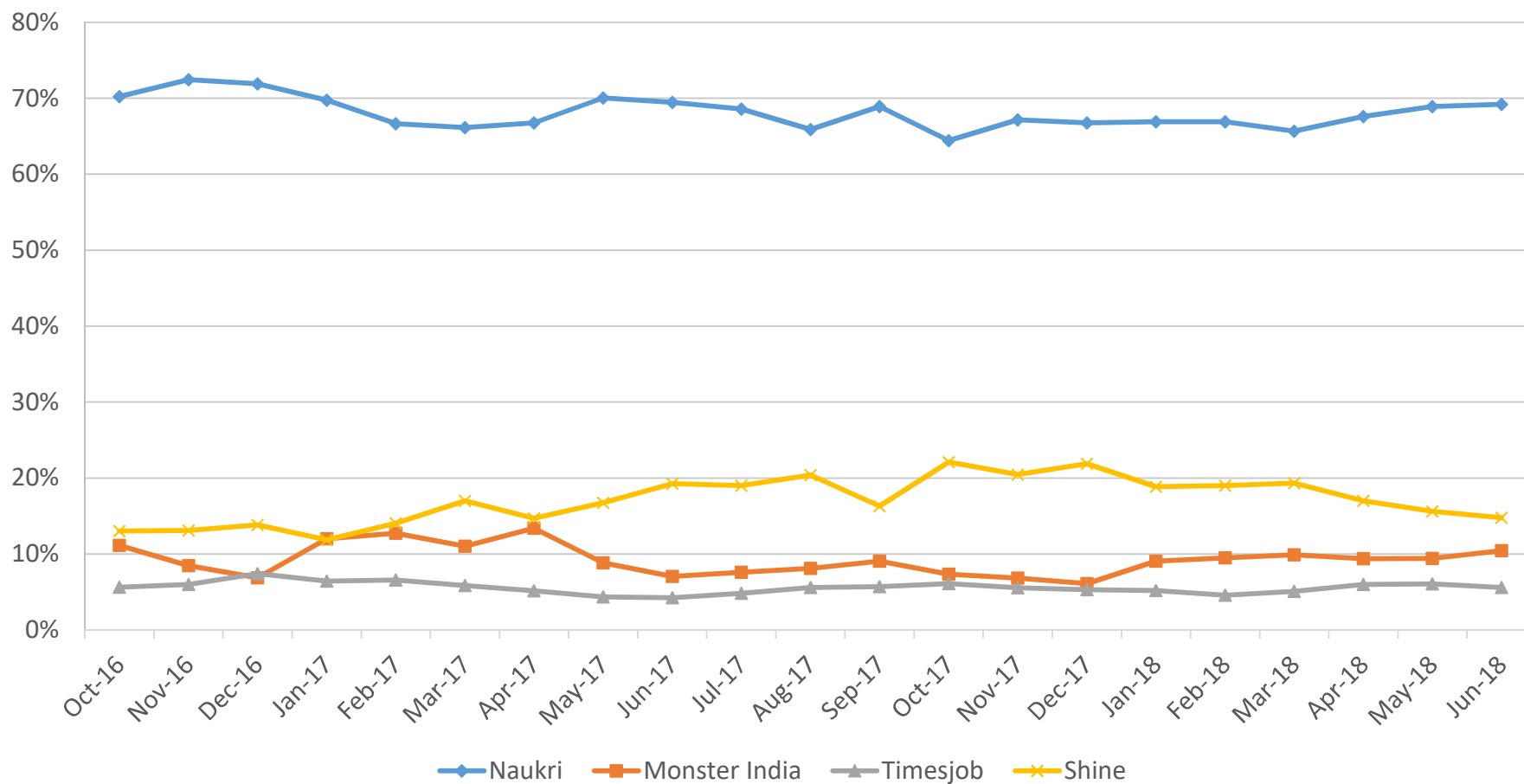


Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs

# Naukri has dominant traffic share

Traffic from mobile web based on time spent – excluding indeed



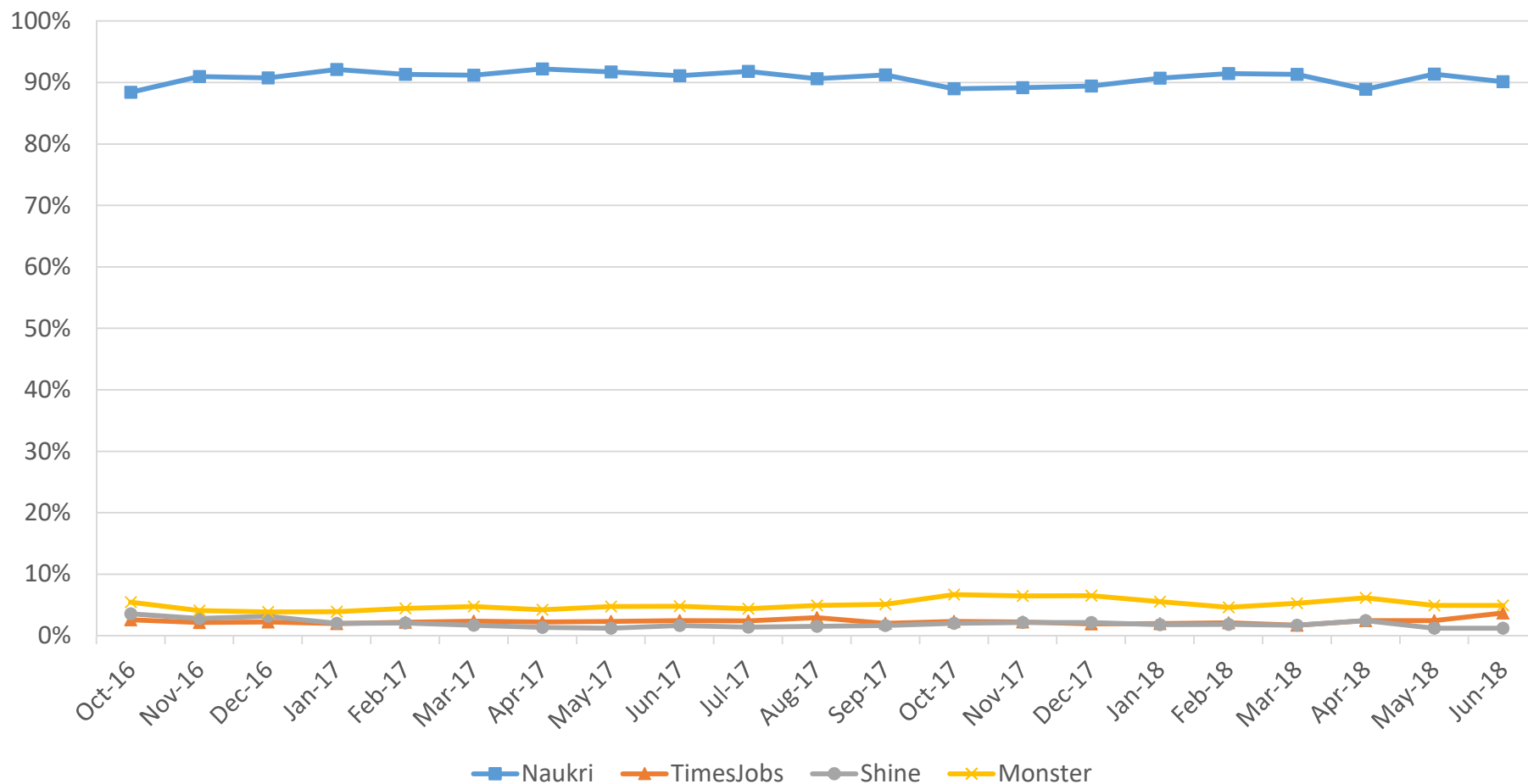
Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs

\* ~70% of Naukri's traffic comes through Android / iOS apps and mobile site

# Naukri has dominant traffic share

Android App traffic share based on time spent – excluding indeed



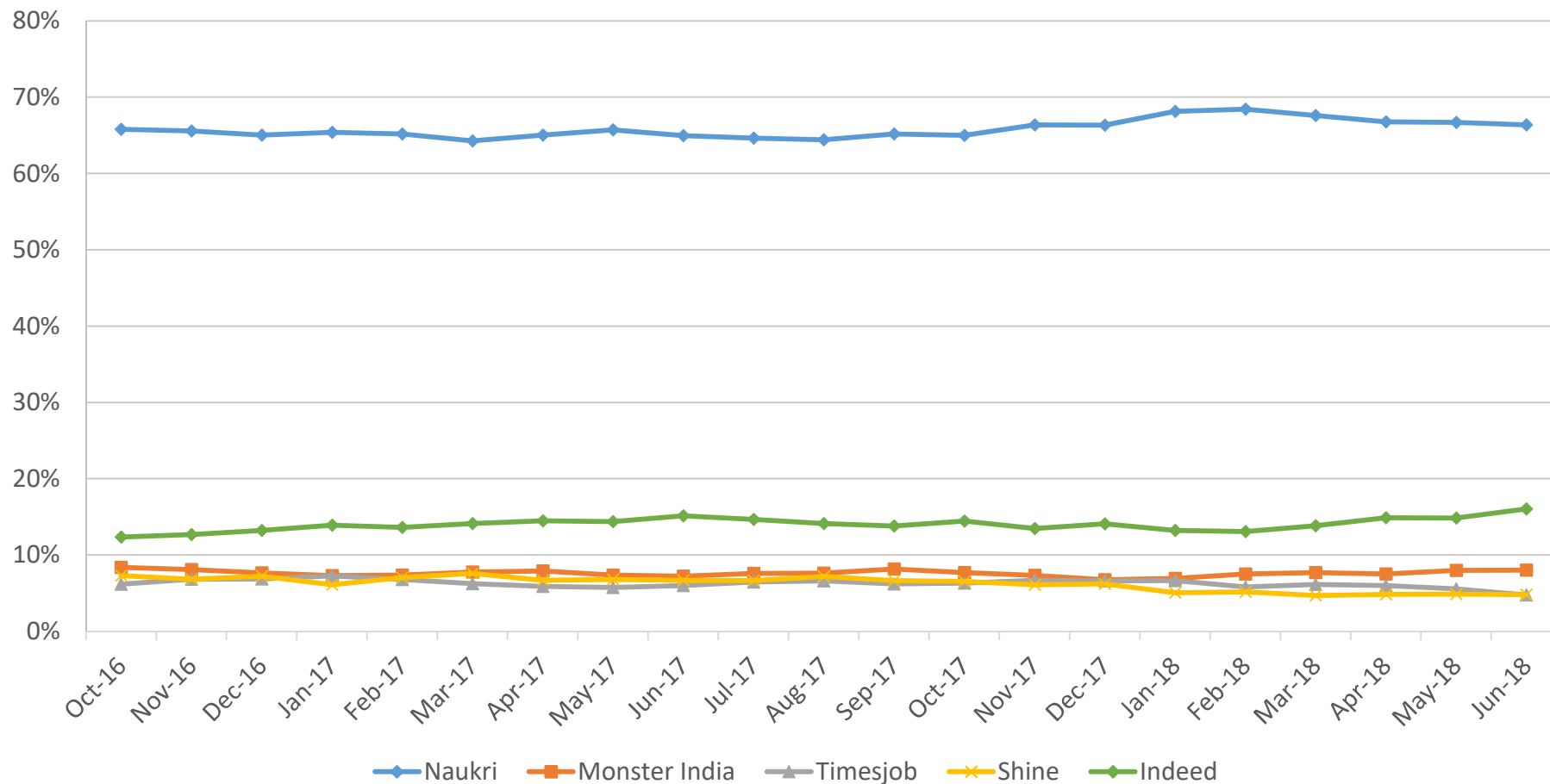
Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs

\* ~70% of Naukri's traffic comes through Android / iOS apps and mobile site

# Naukri's traffic share

Naukri's Desktop and Laptops traffic based on time spent – including Indeed



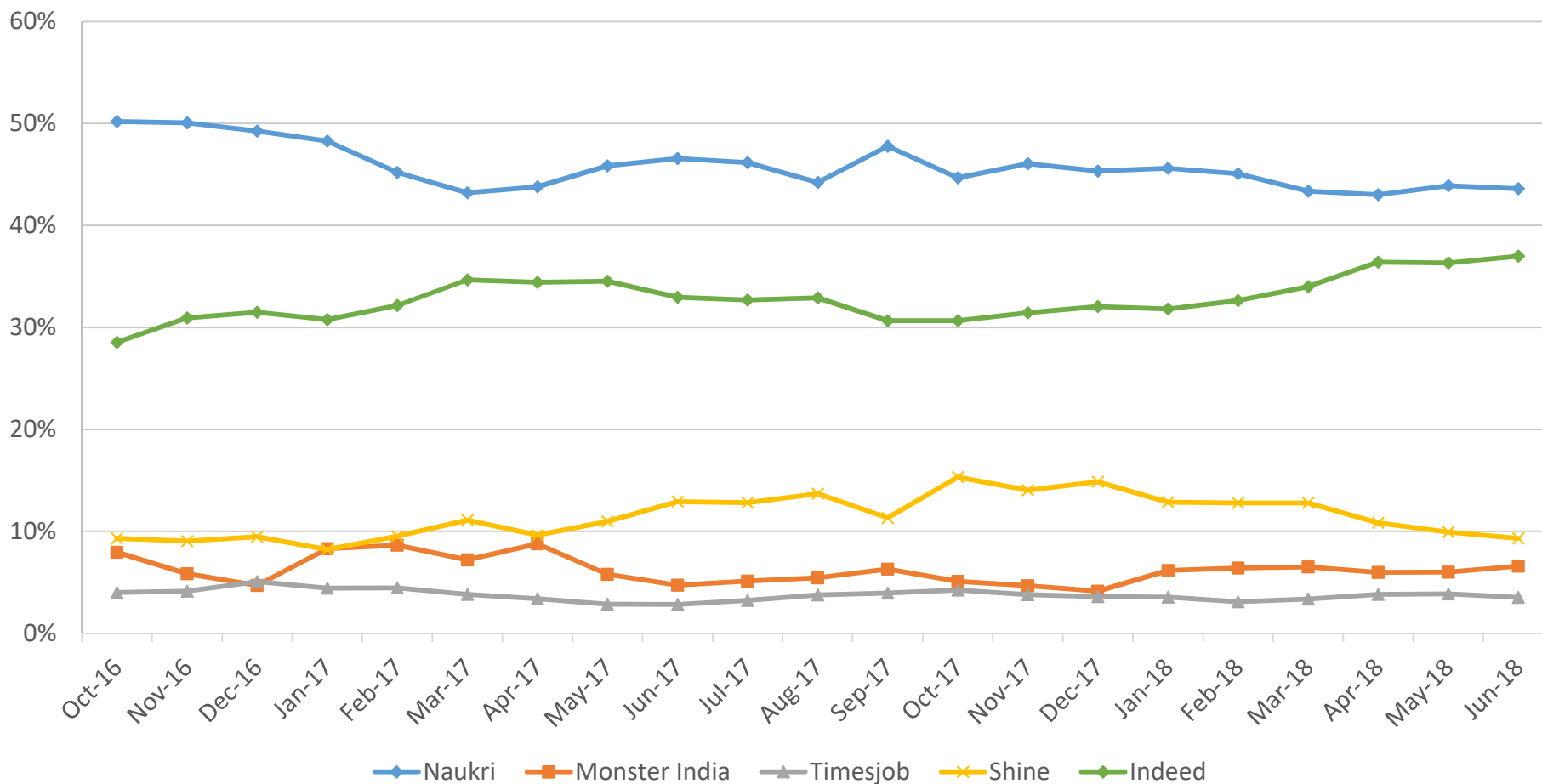
Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs



# Naukri's traffic share

Naukri's mobile web traffic based on time spent – including Indeed

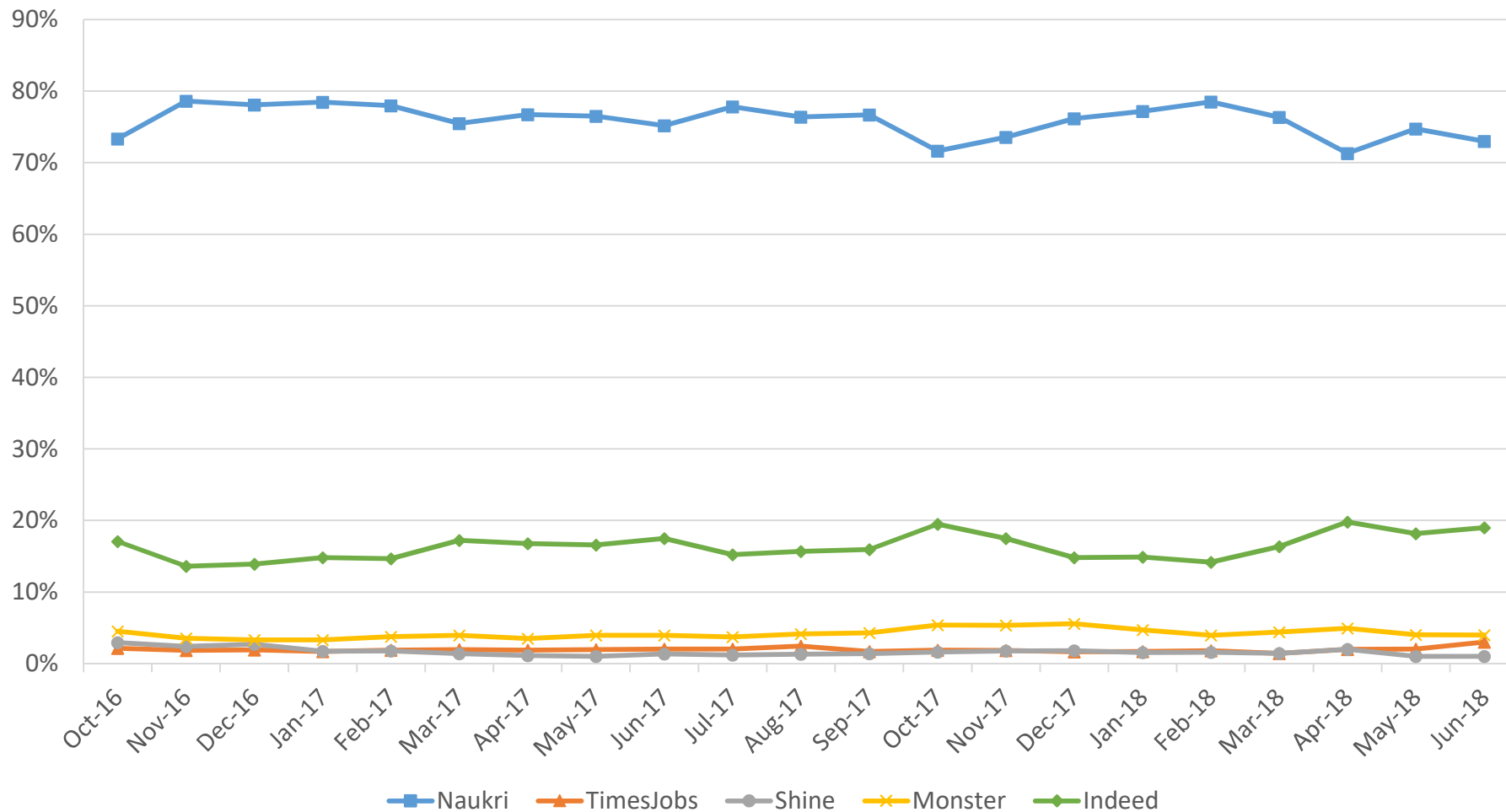


Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs

# Naukri's traffic share

Naukri's Android App traffic based on time spent – including Indeed



Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs