

Info Edge (India) Limited

India's internet classifieds company

May, 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).

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

Q4 FY18 or Q4 FY17 - 18 means the period Apr 01, 2017 to Mar 31, 2018

FY17 or FY 16-17 or FY 2017 means the Financial Year starting April 1, 2016 and ending March 31, 2017

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[#]



India's leading restaurant ratings and review site

Shareholding ~31%*[@]



India's leading insurance comparison site

Shareholding ~10%*[^]



Supplementary online learning platform for K12 and Entrance Exams

Shareholding ~66%*



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

Shareholding ~47 %*

[#] 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%), Gramophone (Agri-Inputs e-commerce, 25%)

* 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.

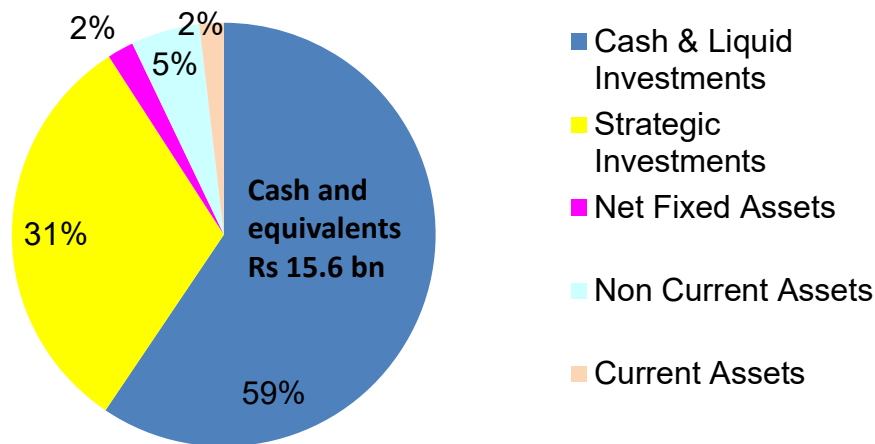
[@] As of 31 Mar 2018

[^] being Info Edge's proportionate share of economic interest. Info Edge's 50.01% subsidiary, Makesense holds nearly 16.4% of PolicyBazaar in association with Temasek. Temasek had infused a total of Rs 1.34 bn for its 49.99% stake in Makesense in Oct, 2015. Remaining 1.6% is held through a fully owned subsidiary.

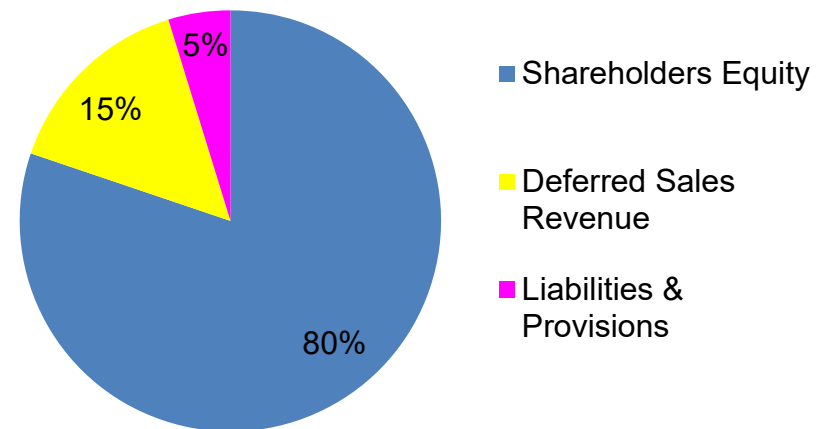
Info Edge has a strong balance sheet

As of Mar 31, 2018

Assets – 59% Cash



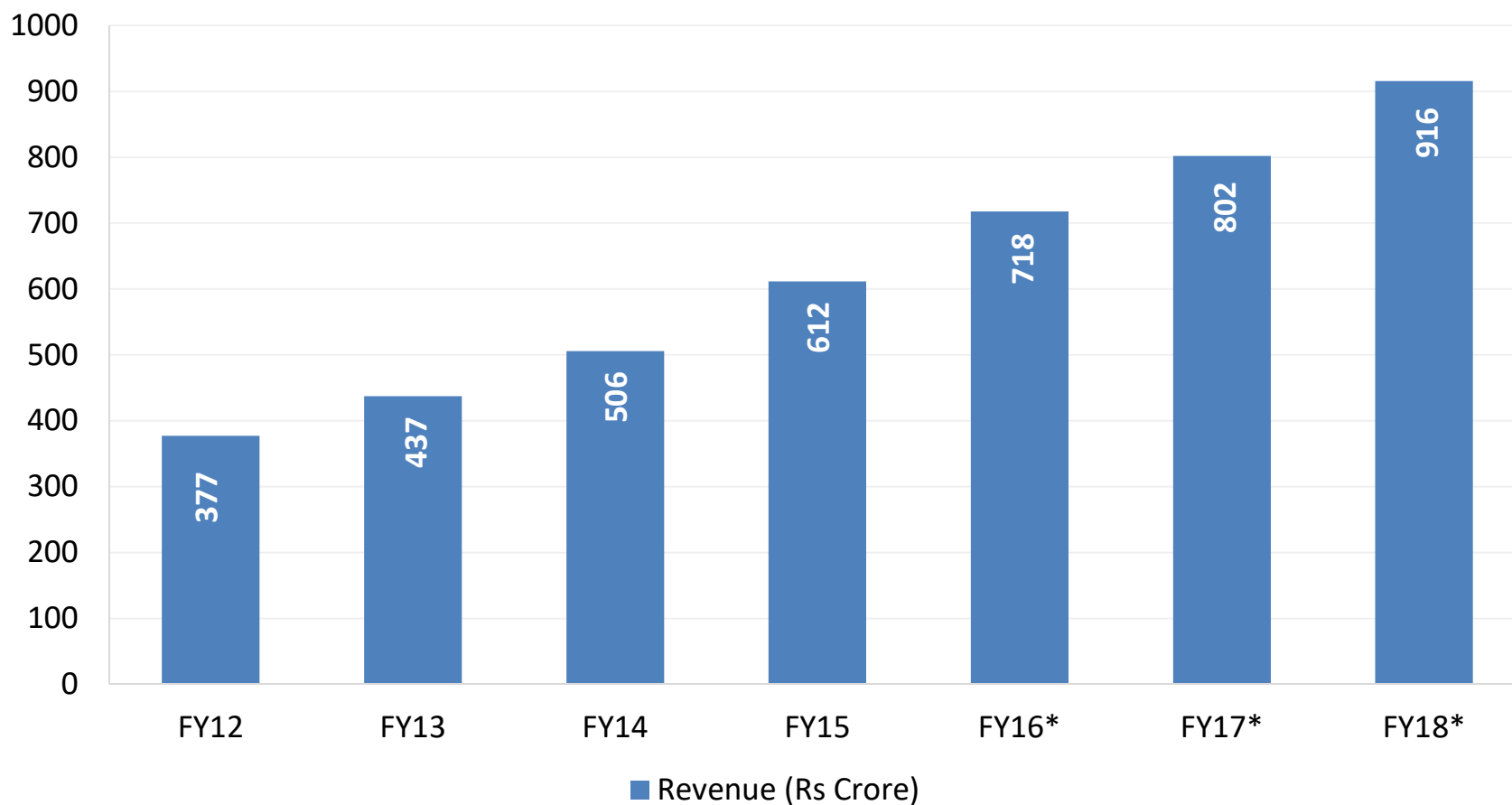
Liabilities – Negligible leverage



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

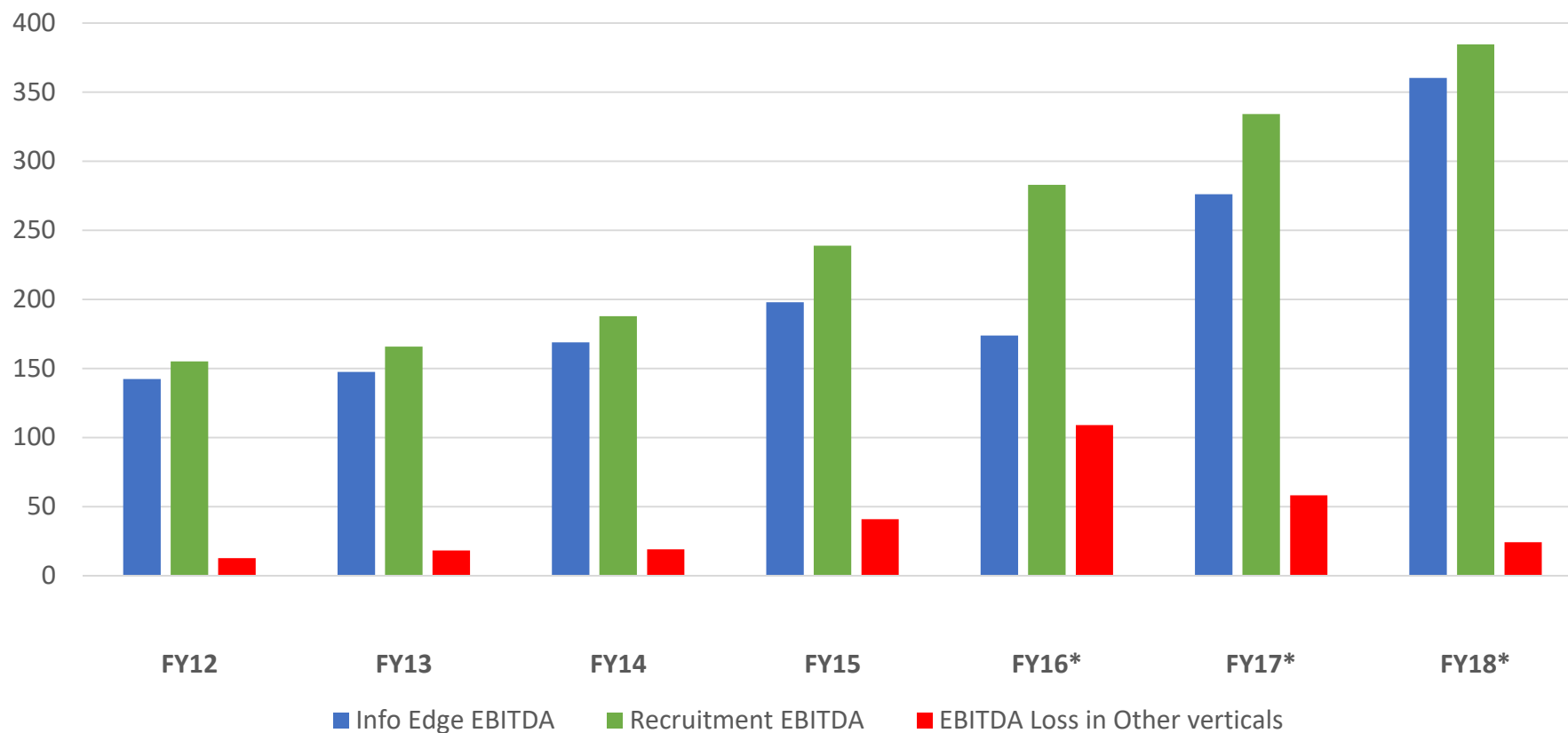
Revenue (Rs crore) for the standalone entity (2012 – 2018)



- 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

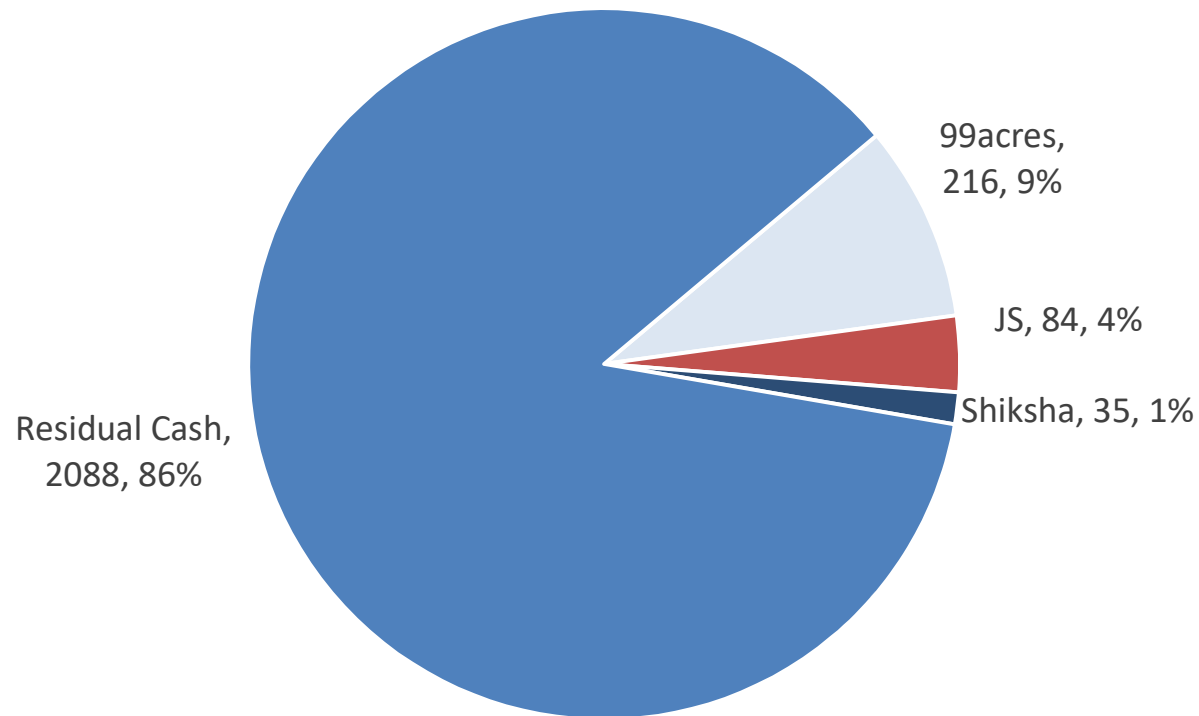
Info Edge and Segment-wise EBITDA (Rs crore)



* 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 date

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 (54)

Founder and Executive Vice
Chairman

BA Econ. St. Stephen's.

PGDM IIM-A

Previously with GlaxoSmithKline

Hitesh Oberoi (45)

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 (51)

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

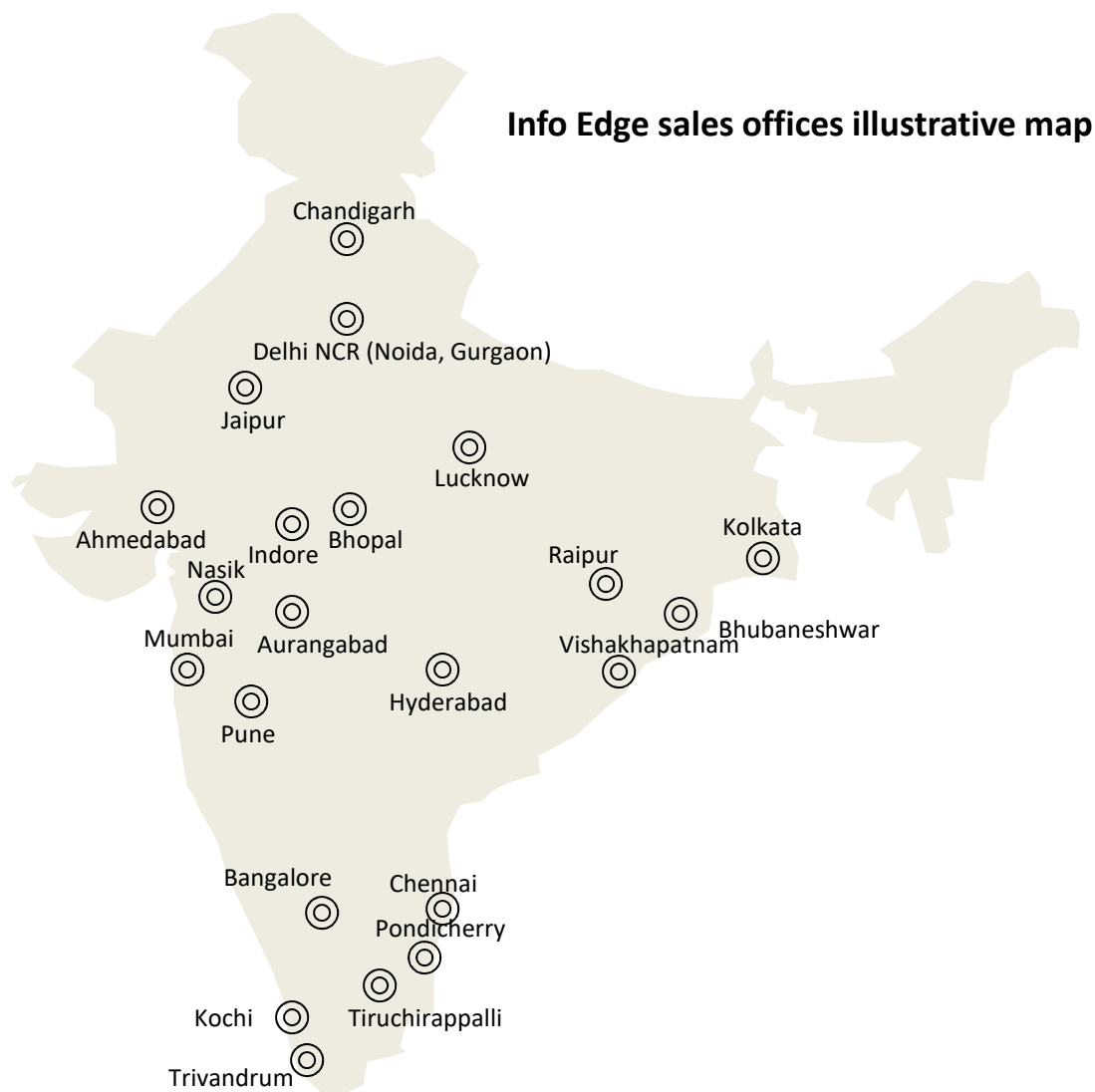
Ashish Gupta (51)

Independent Director

B Tech IIT-K, Doctorate from
Stanford University

Founder Tavant Technologies,
Jungle; Amazon

Nationwide sales/customer interface infrastructure

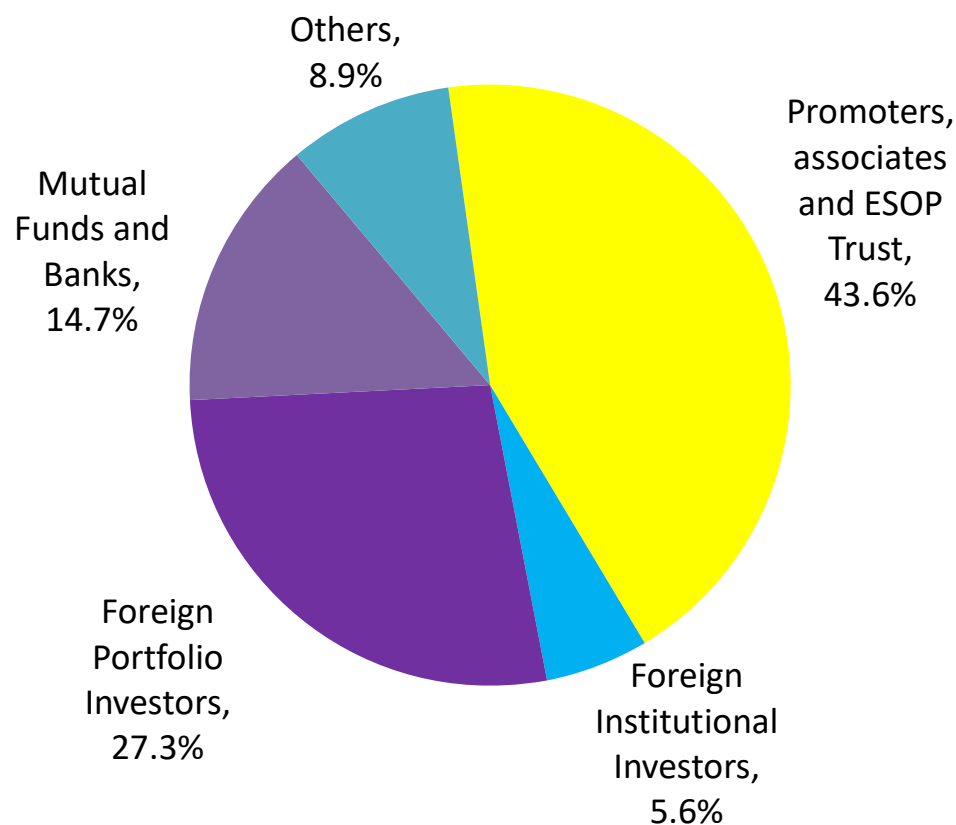


Key Observations

- Nation wide coverage through 71 company branch offices in 46 cities in India
- ~ 2,812 sales/ servicing/ client facing staff or 70% of the company's* workforce of ~4,036

* Including Allcheckdeals, a wholly owned subsidiary

Promoters and associates holding ~43.6% and Institutional Investors holding ~47.6% (as of Mar 31, 2018)



Axis Mutual Fund	3.62%
Ward Ferry	3.24%
Nalanda	3.16%
Amansa	3.05%
Aranda Investments (Mauritius)	2.69%
Matthews	2.51%
Goldman Sachs EM Fund	2.33%
Mirae Asset	2.20%
HDFC	1.99%
Reliance Mutual Fund	1.79%
Vanguard	1.60%
Franklin Templeton MF	1.47%
SBI	1.26%
Morgan Stanley (Mauritius)	1.15%
Karst Peak	0.96%
TVF Fund	0.81%
City of New York Group Trust	0.75%
Emerging Markets Asia Growth Fund	0.71%
Postal Life Insurance Fund	0.70%

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", "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 upload 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 tabs for "All Sectors", "Information Technology", "Manufacturing", and "Services".

Key business metrics for Naukri

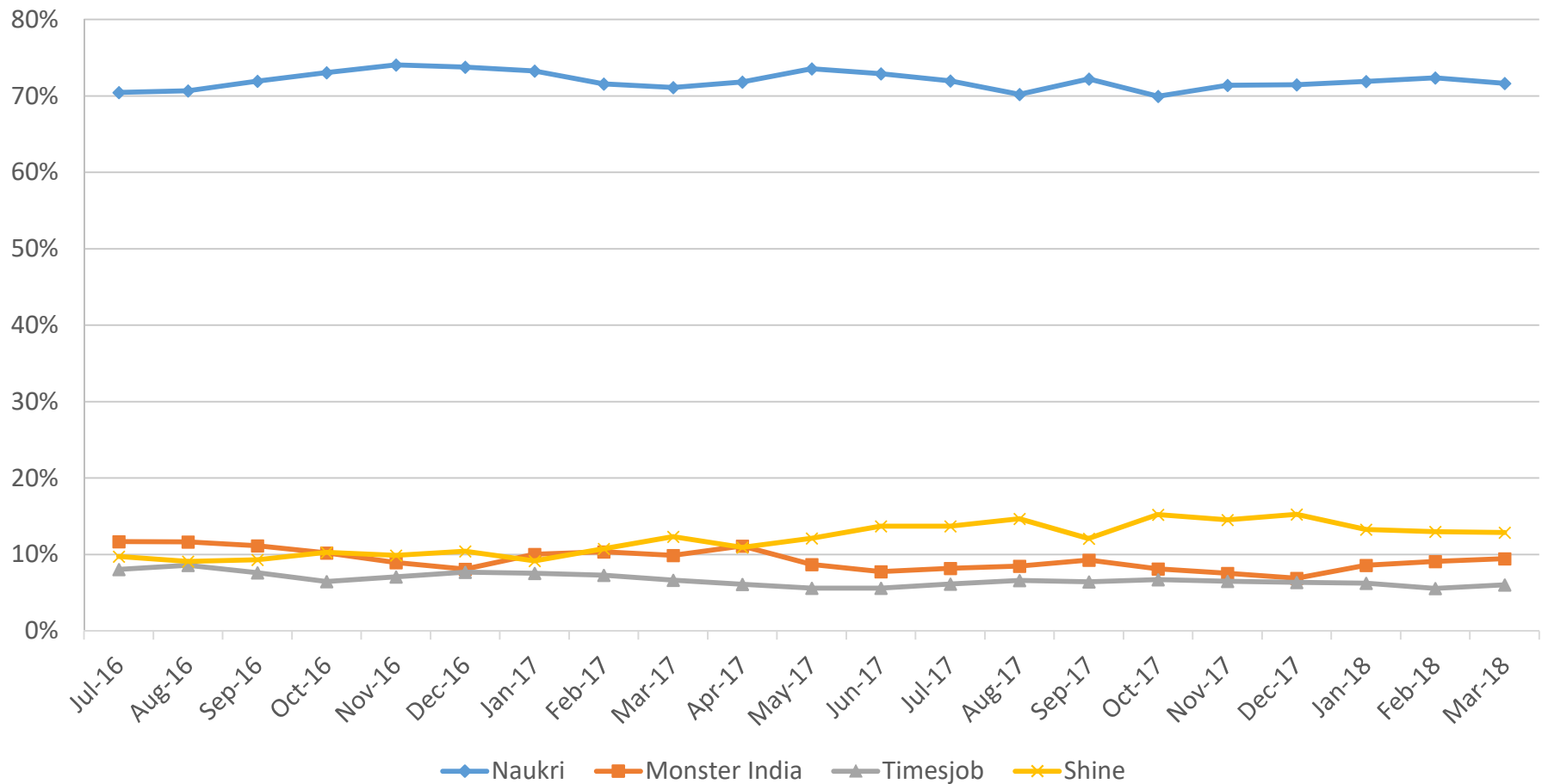
- During or end of, Q4 FY 17-18
 - 72% traffic share* in Mar, 2018 (Source : SimilarWeb)
 - 475,000 avg. job listings on a given day
 - ~57 million resumes
 - 16,600 avg. resumes added daily
 - 330,000+ resumes modified daily
 - 750,000 to 1,000,000+ resume searches daily
 - 6 to 10 million resume contacts by recruiters daily
 - 50,000+ job seekers availed premium services
- 76,000 unique clients in FY18 vs 70,500 in FY17 (based on IND-AS revenue)

* From desktop and mobile web combined

* Comparison among job-boards excludes LinkedIn and Indeed

Naukri has dominant traffic share

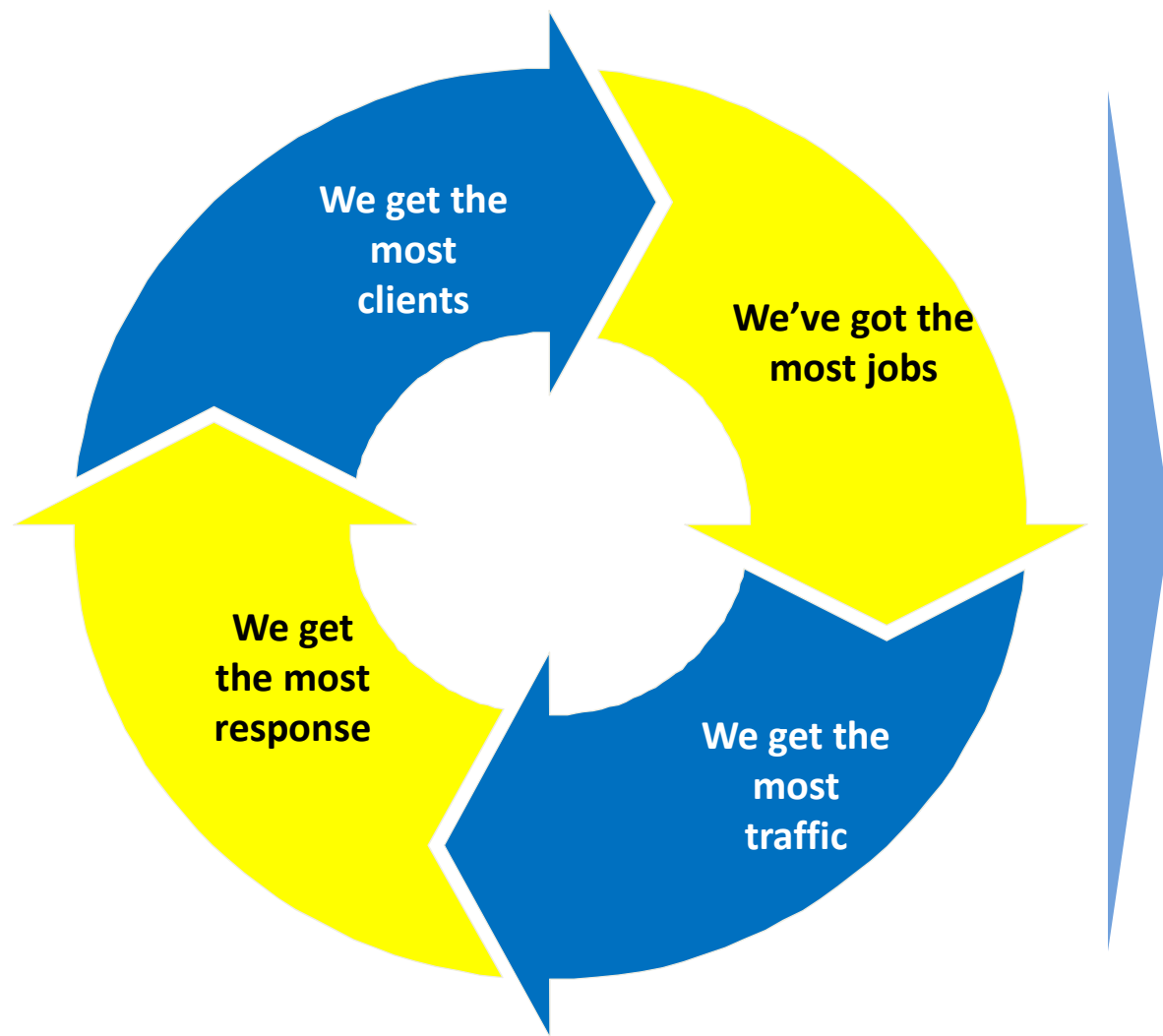
Overall traffic (from desktops & laptops and web mobile) based on time spent



Source: SimilarWeb

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

Naukri is a business of the virtuous circle



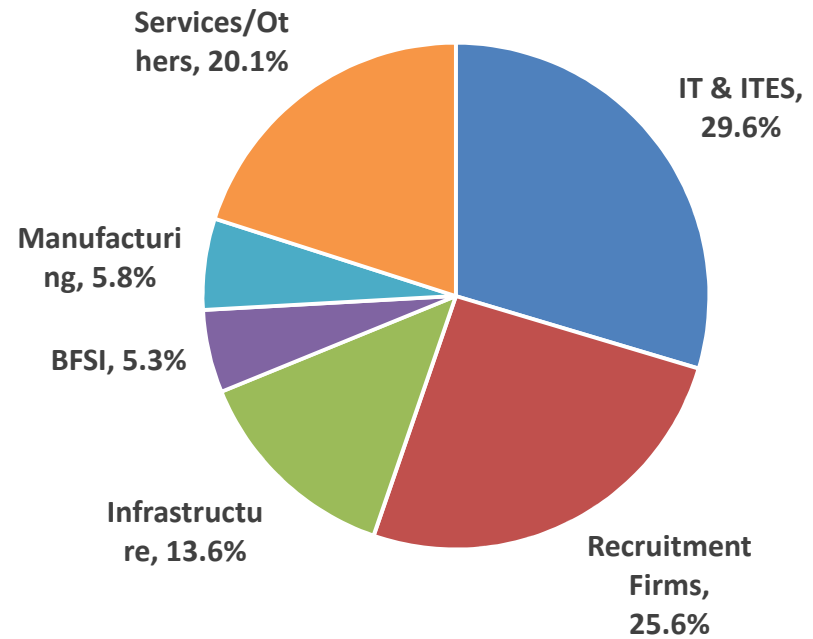
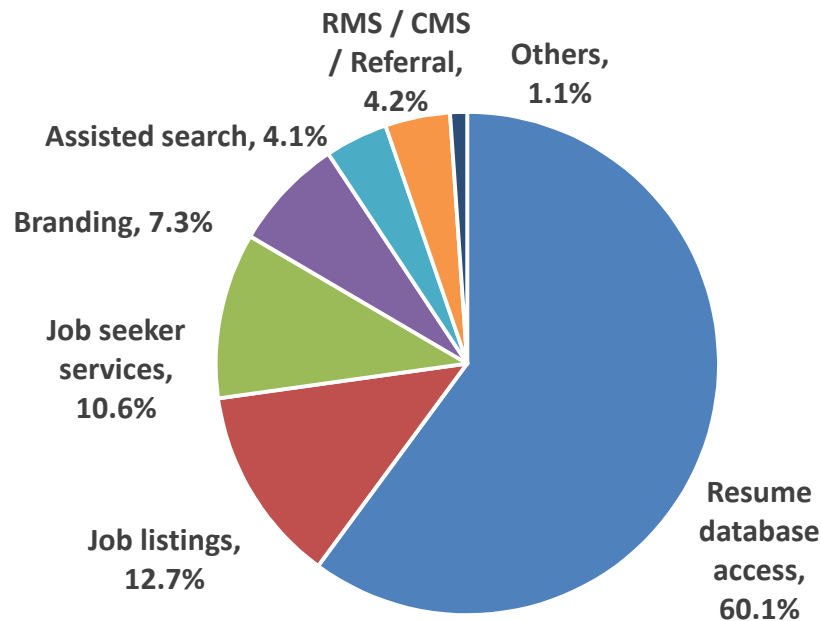
Benefits

- 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 ~90% 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 FY17-18

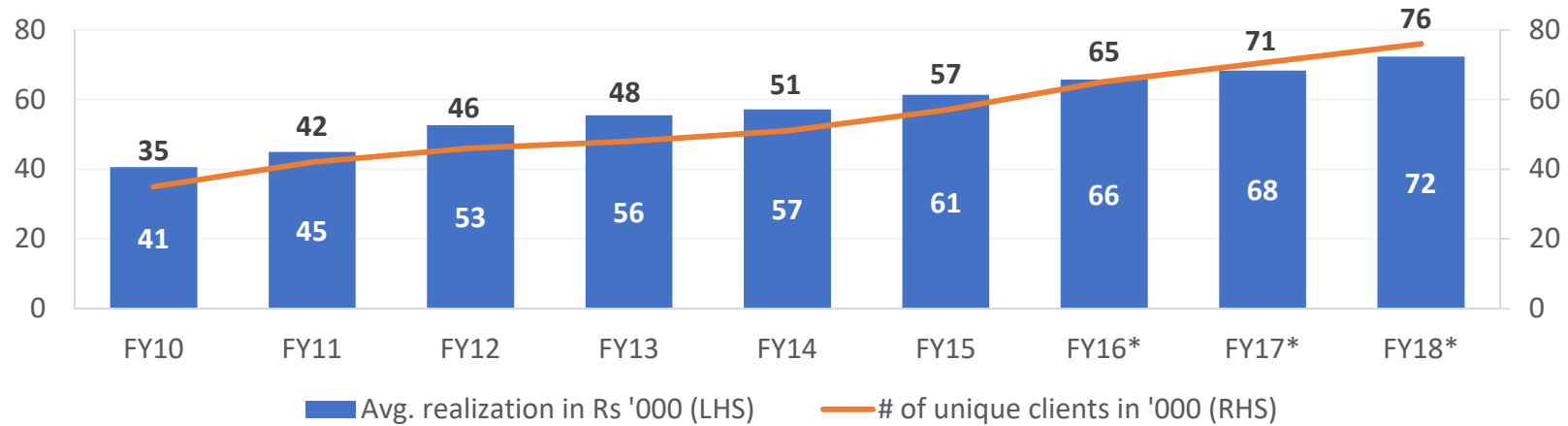


From our interaction with recruitment firms, we believe 50% of their revenues come from IT industry; Accordingly, IT and ITeS contributes ~42% of overall revenues.

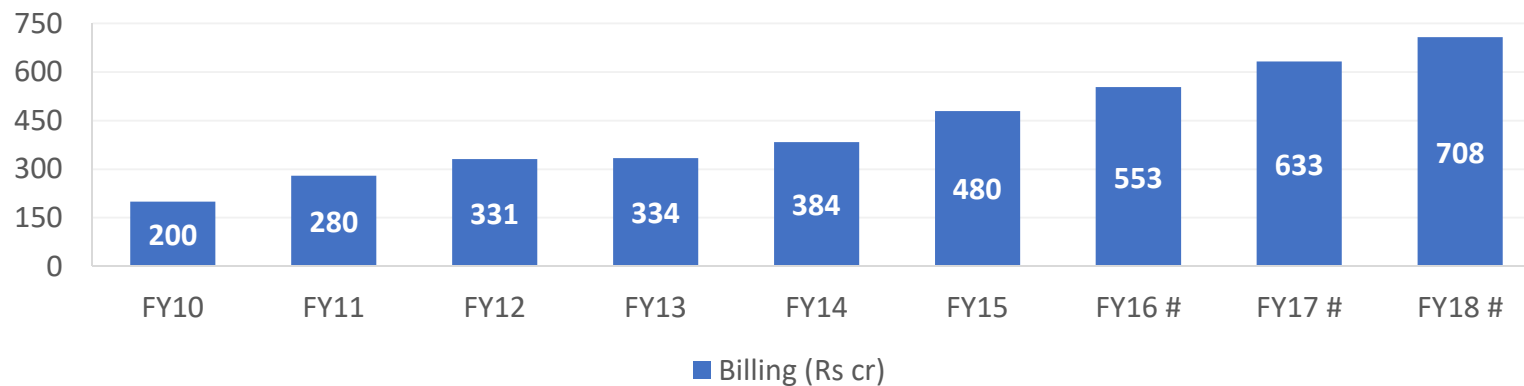
BFSI is Banking, Financial Services and Insurance

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

Naukri India - Revenue per client and # of clients

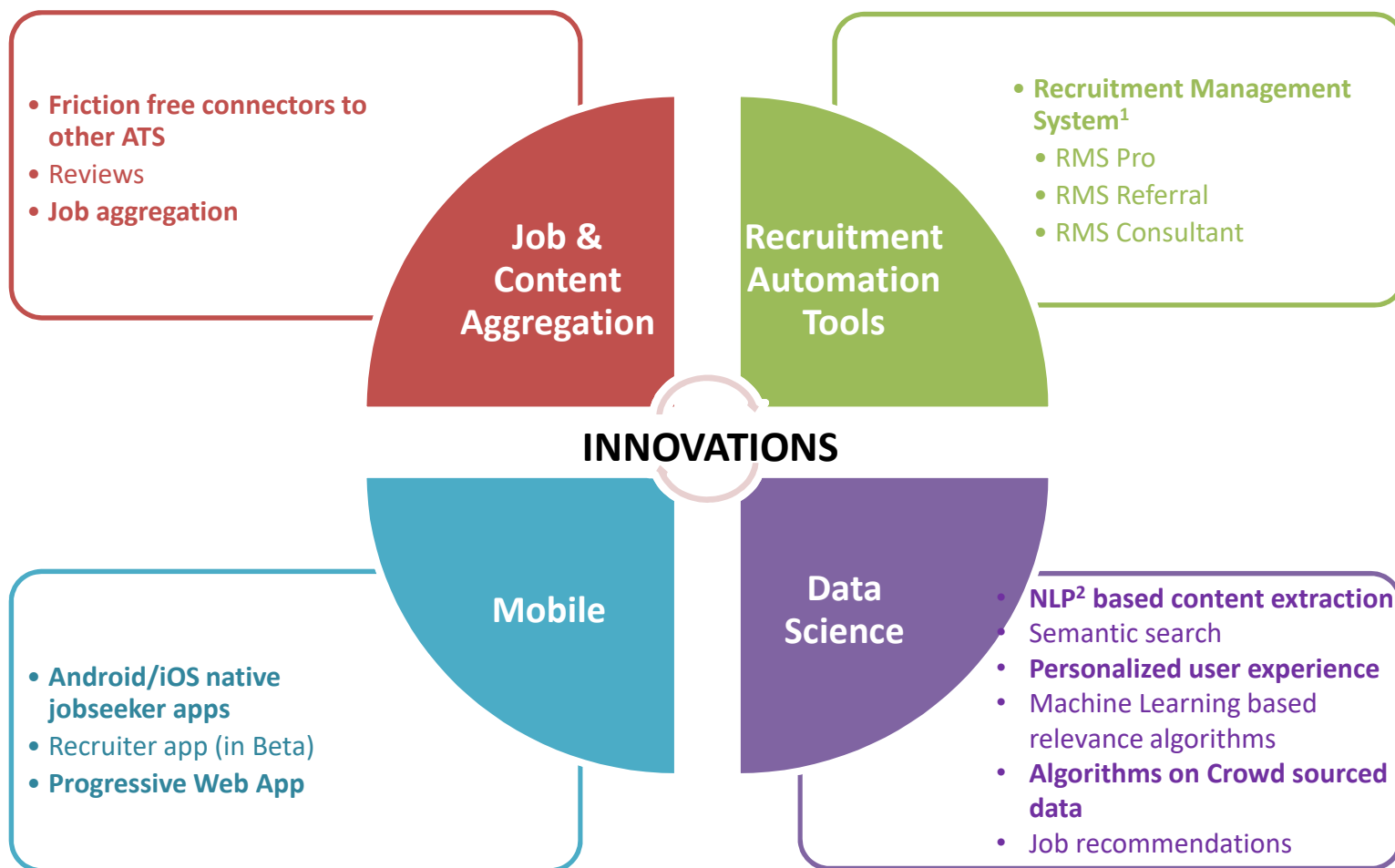


Recruitment segment Billing



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

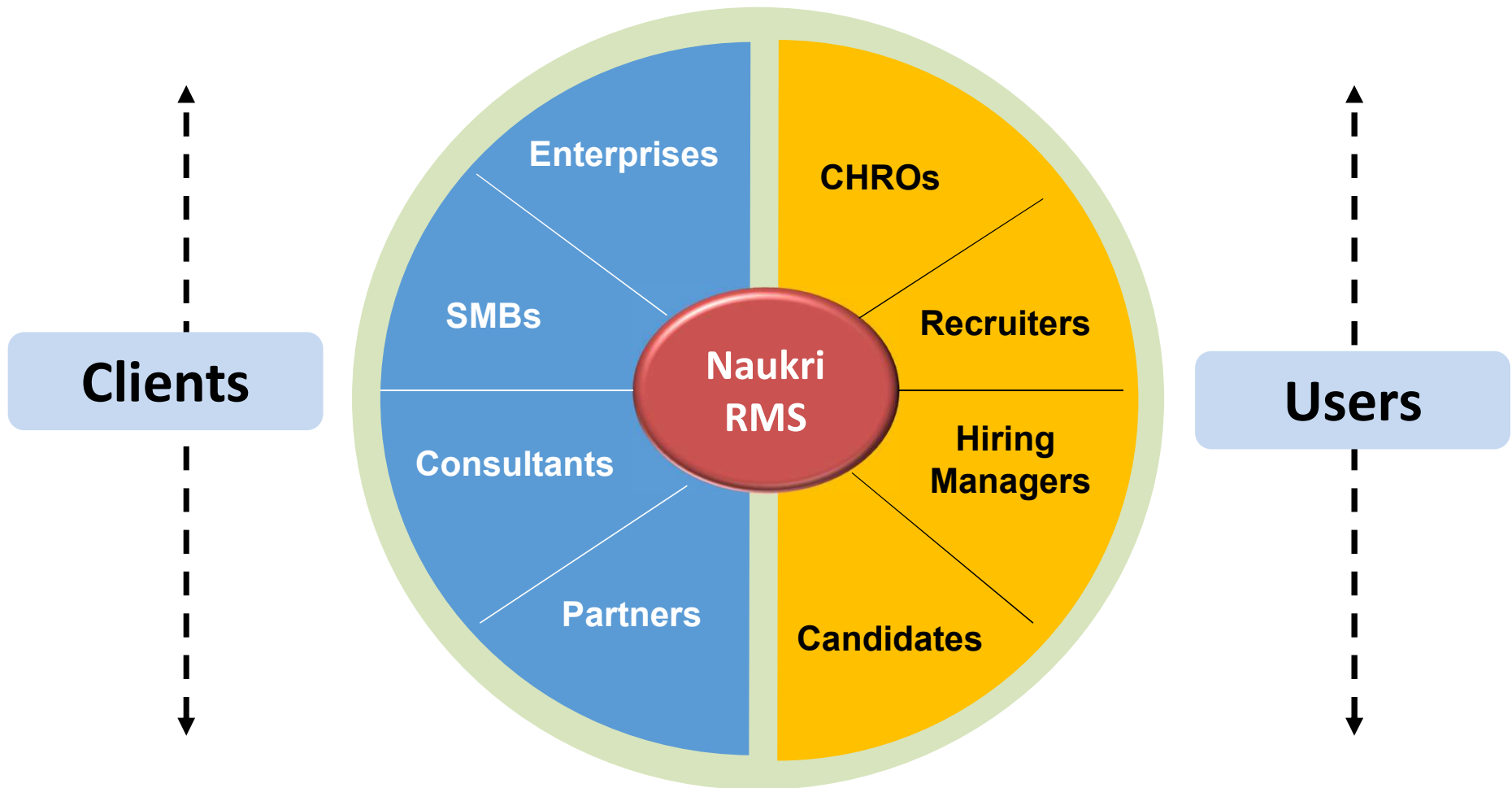
Product Innovation is cornerstone of our strategy



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



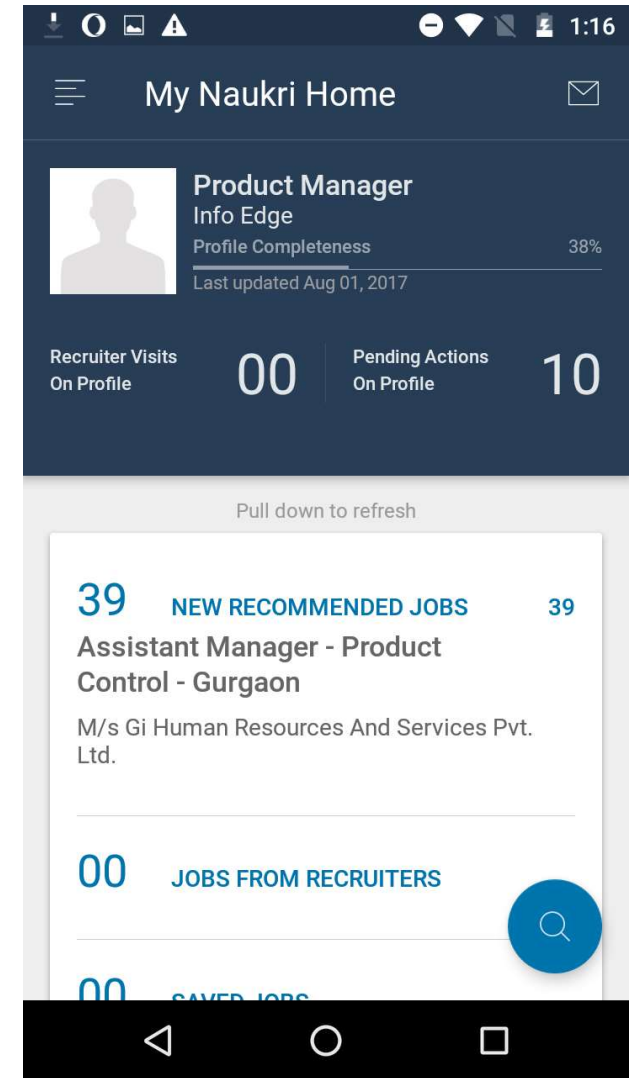
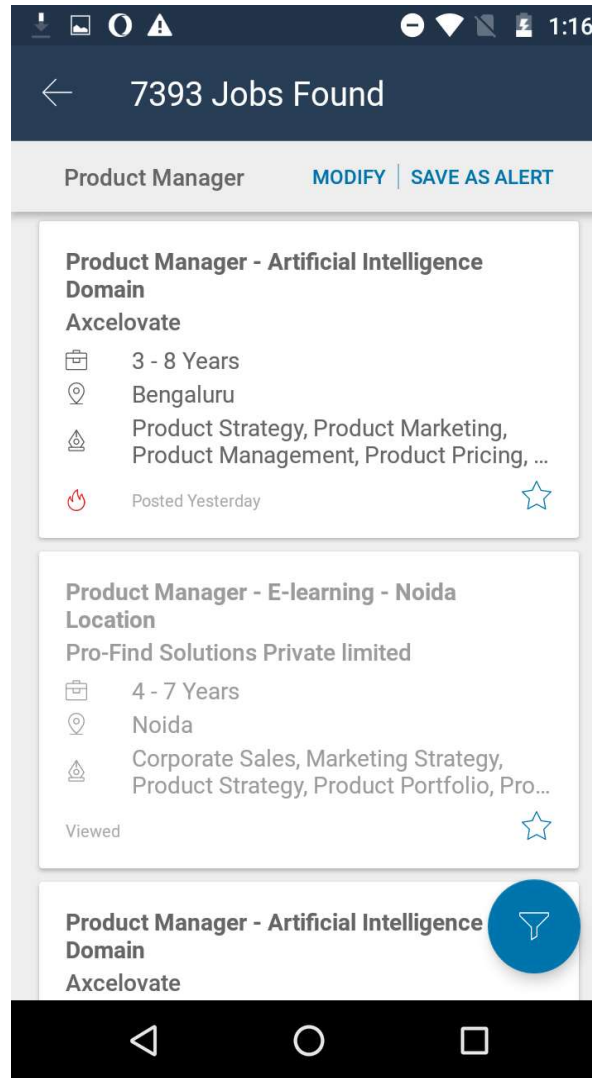
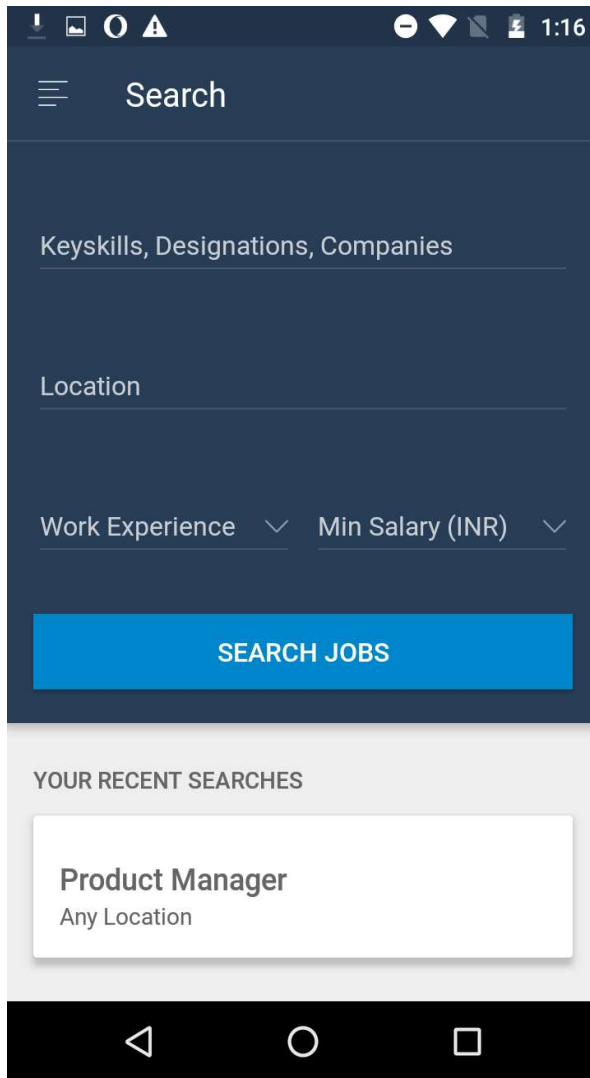
Jobseekers can
'FOLLOW'
Recruiter Updates

Keep jobseekers
informed of recruiter's
Active Jobs

Help Build recruiter's
personal database

Over 175,000 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 300,000 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)	353	103	460,000	6.7
Seek.com^ (Australia)	271	5.5	613,000	5.4
Recruit# (Japan)	1,976	-	-	47.2
Info Edge**	99	57	76,000	1.3

* Annual report/ presentation for year ended December 31, 2016

^ 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 annual results for period ending March 2018. 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

@ Revenue converted basis 1 USD = 1.32 AUD = 108.9 JPY = INR 67.5 being exchange rates as of May 31, 2018

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 NEW COUNTY 1
Naya Raipur
279 Bungalows / 416 Apartments

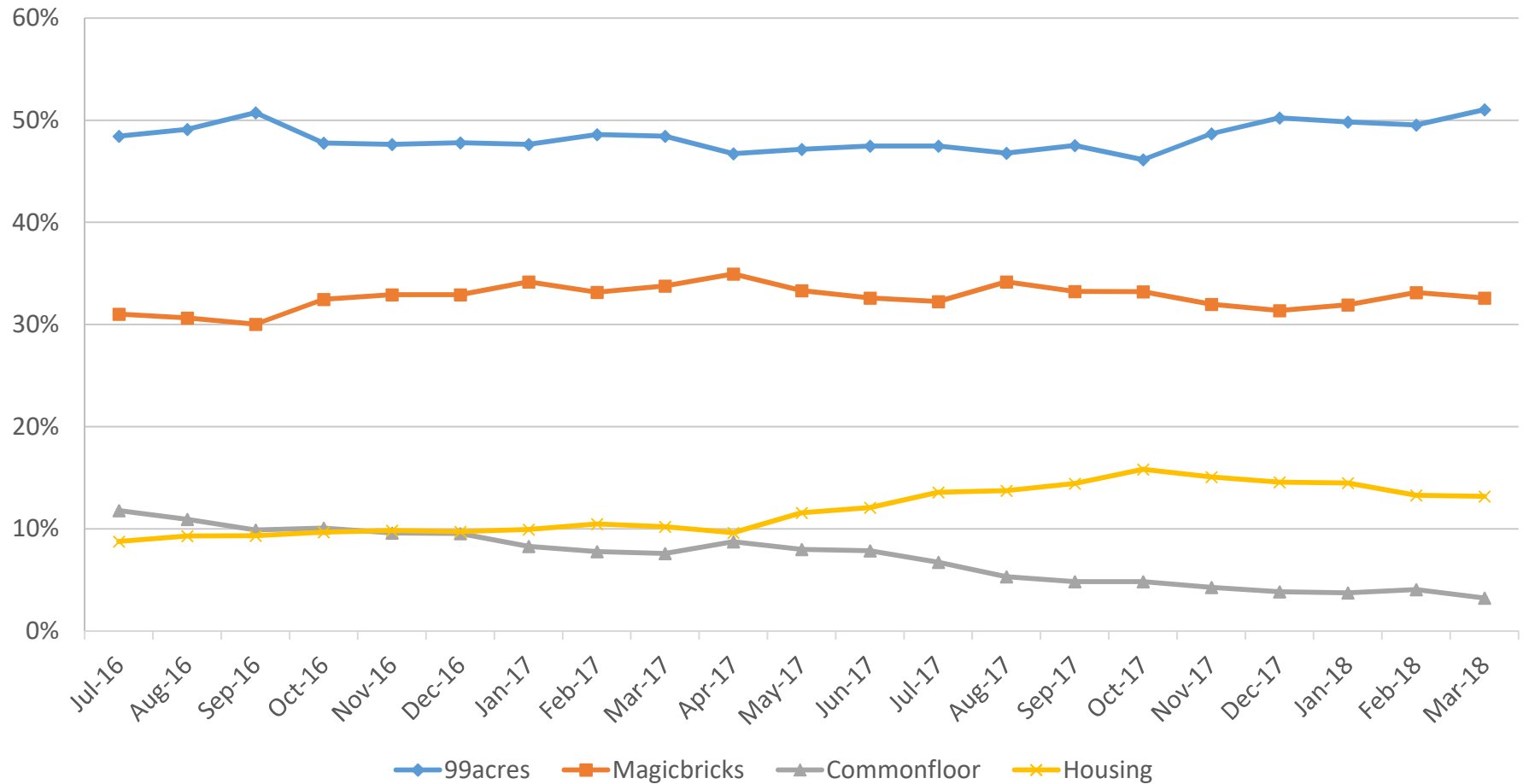
AVINASH NAYA RA
Ready to r
Apartment

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

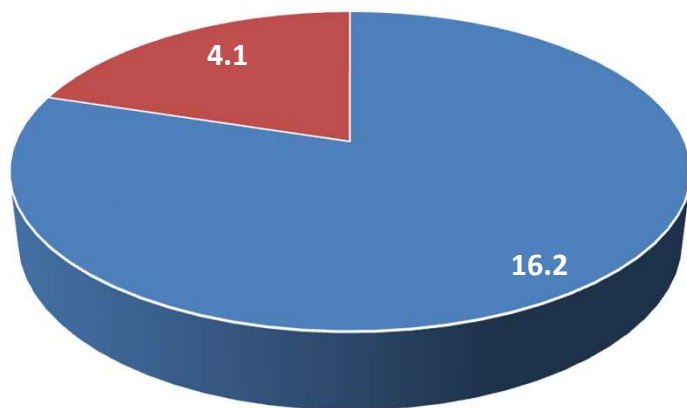
Key business metrics for 99acres

- As of March 31, 2018
 - Total projects 152,000+ (under construction or ready to move in)
 - Total listings** 755,000 (including 302,000 owner listings)
 - Residential 637,000
 - Commercial 118,000

**Typically, listings stay live for 2 months

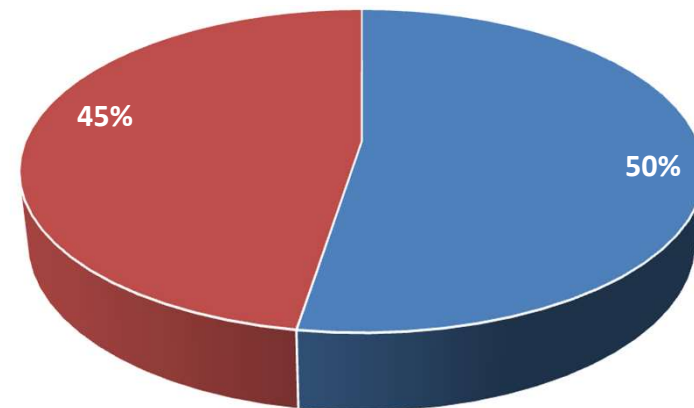
Break-up of customers and billing in FY18

No. of customers in '000



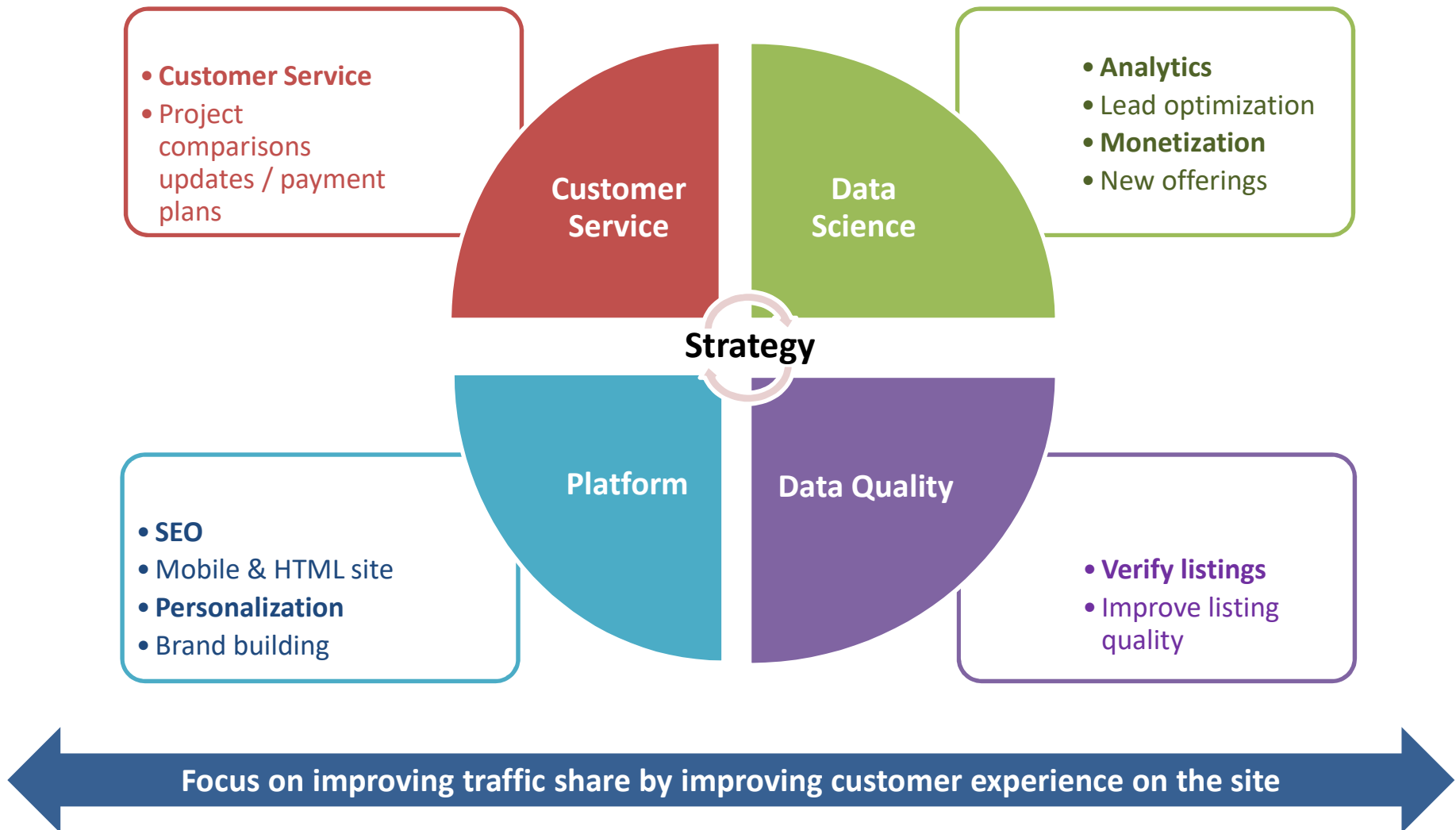
■ BROKER ■ BUILDER

Billing breakup by customer type



■ BROKER ■ BUILDER

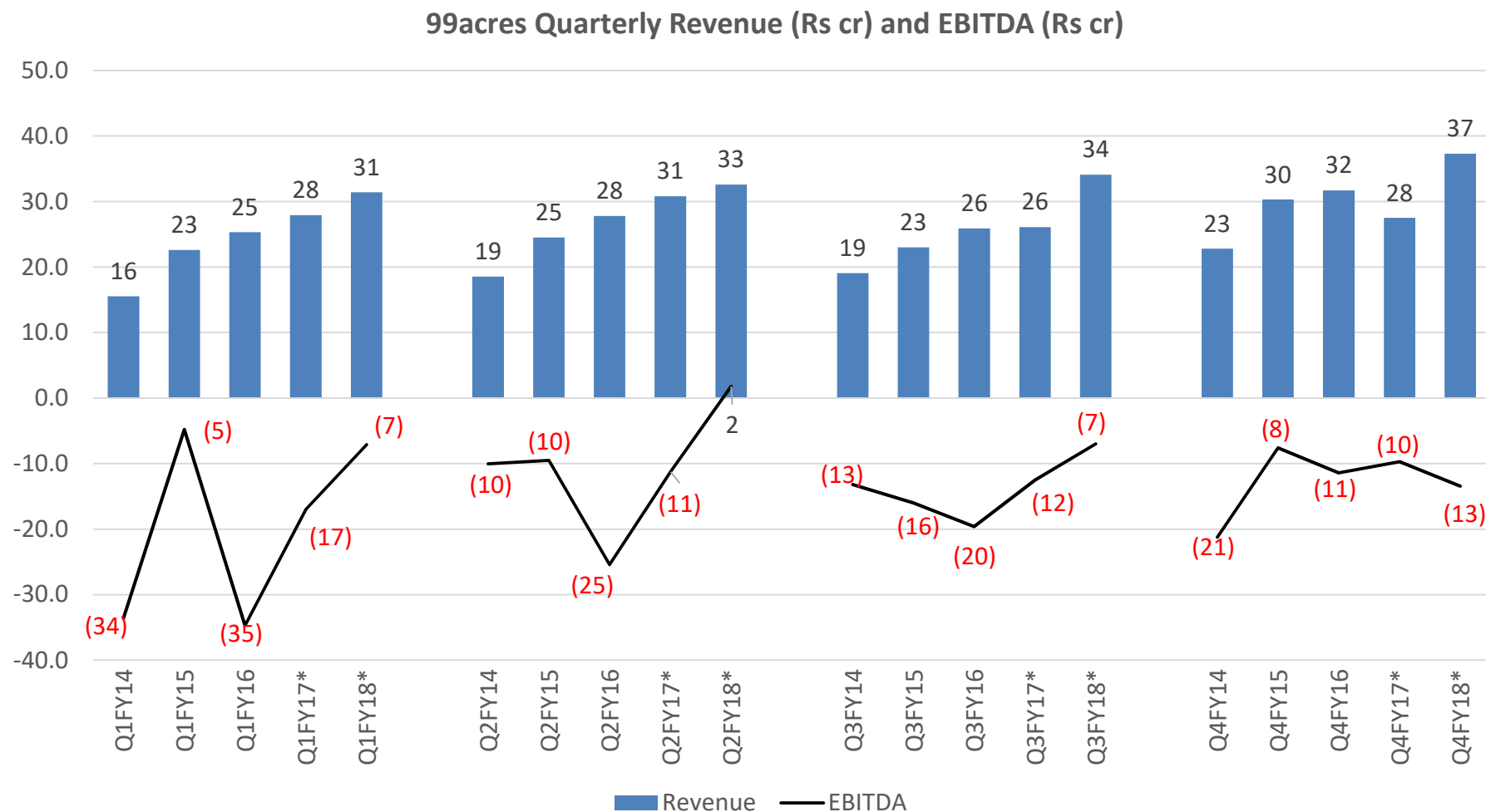
99acres –strategy



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 from here on
- **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

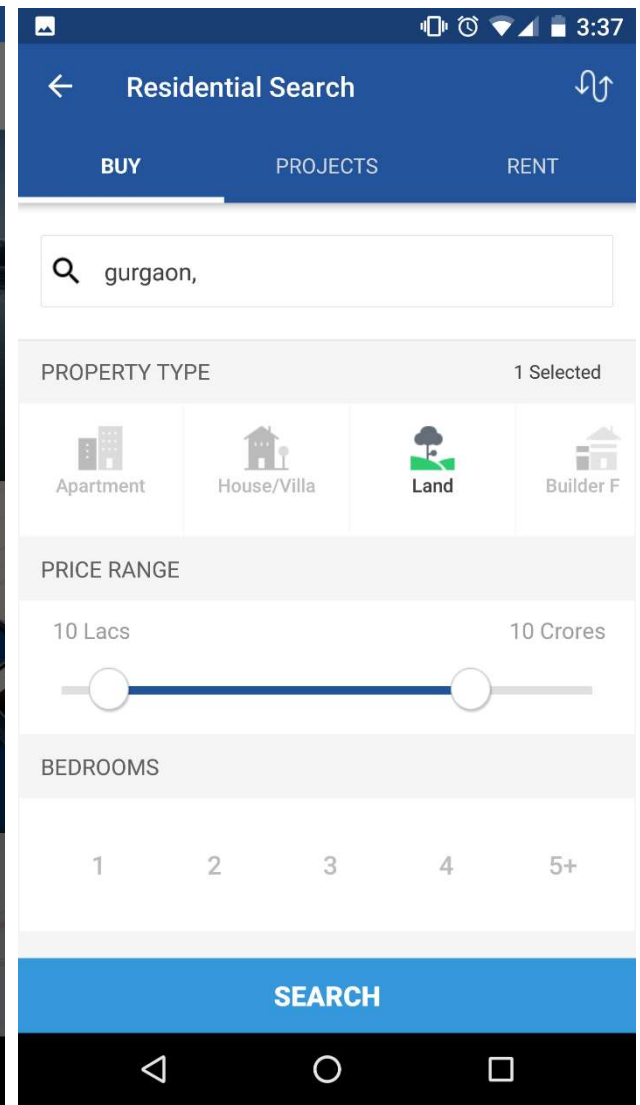
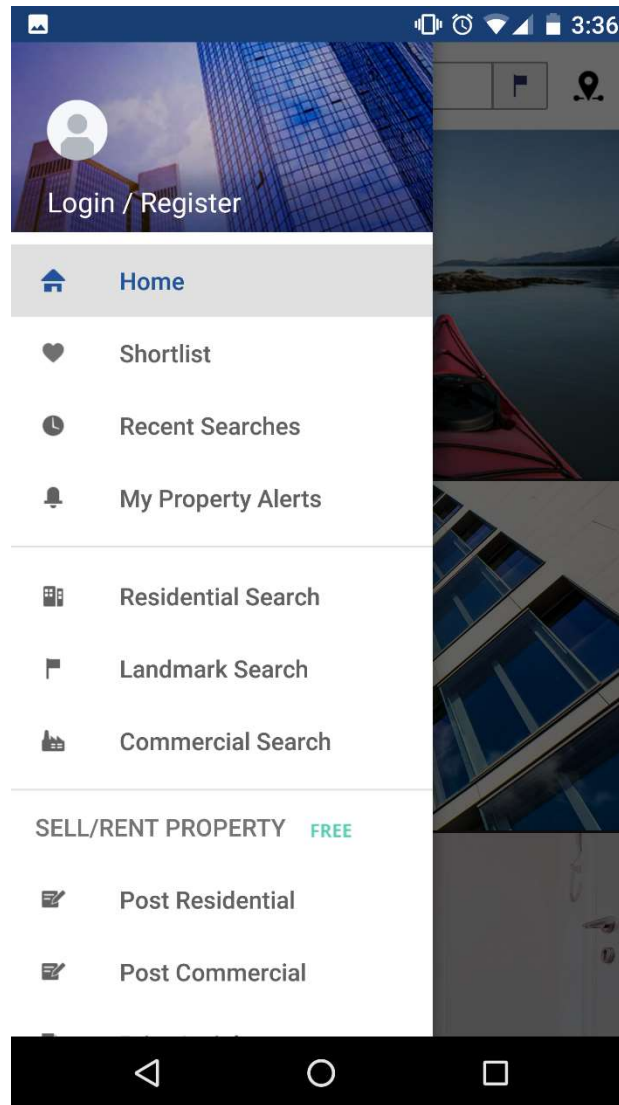
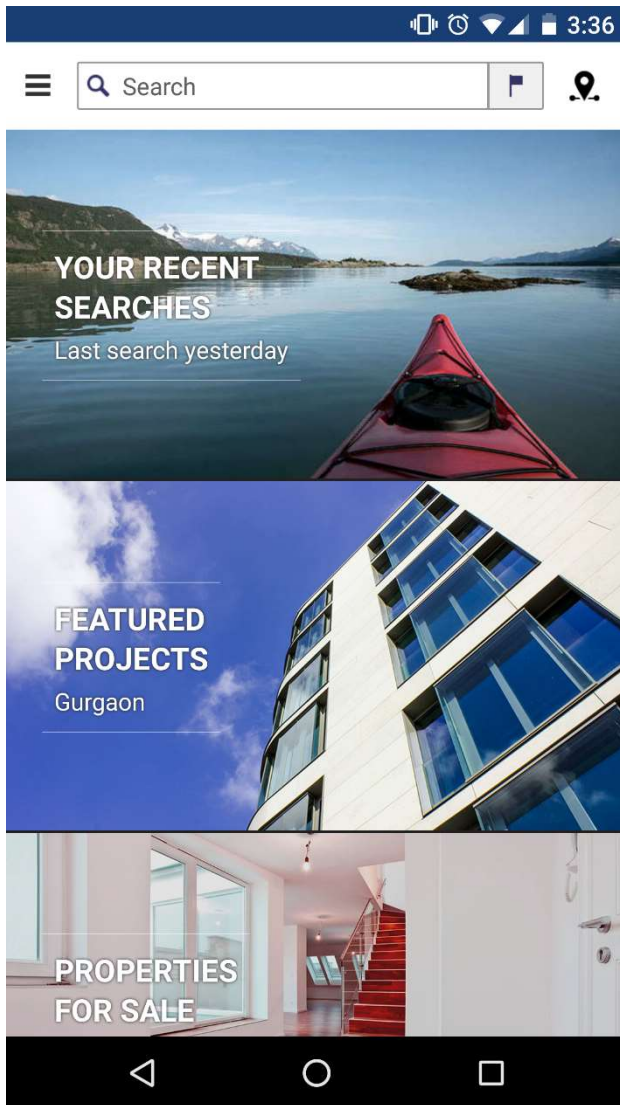
99acres Quarterly Financials



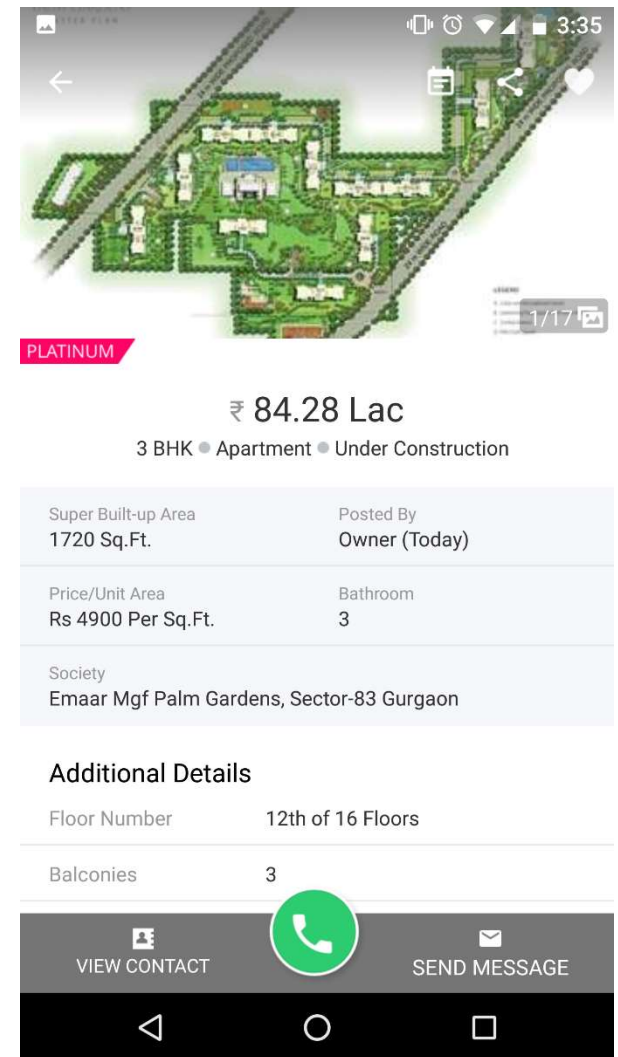
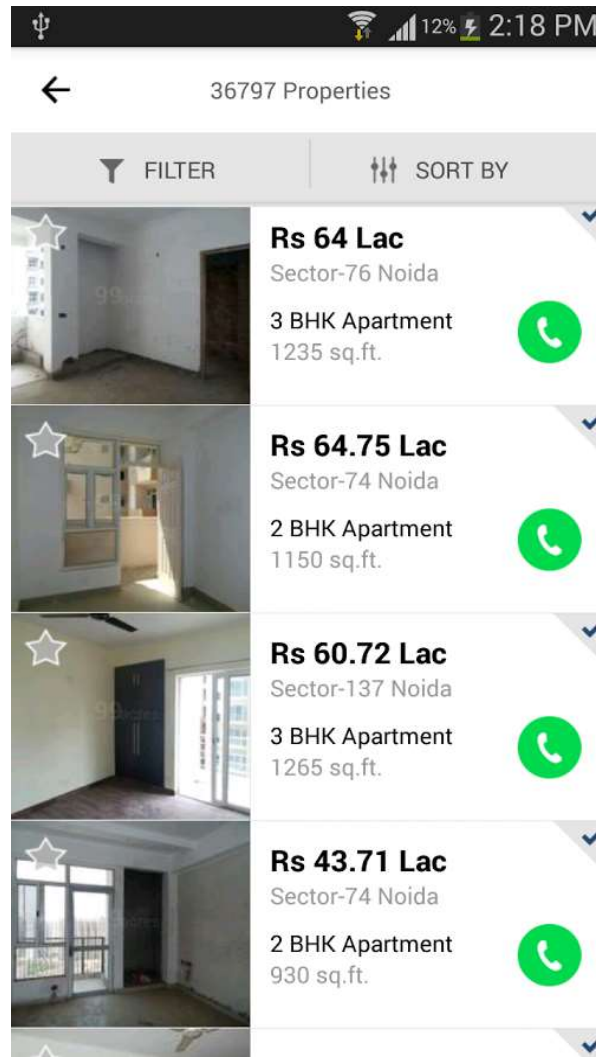
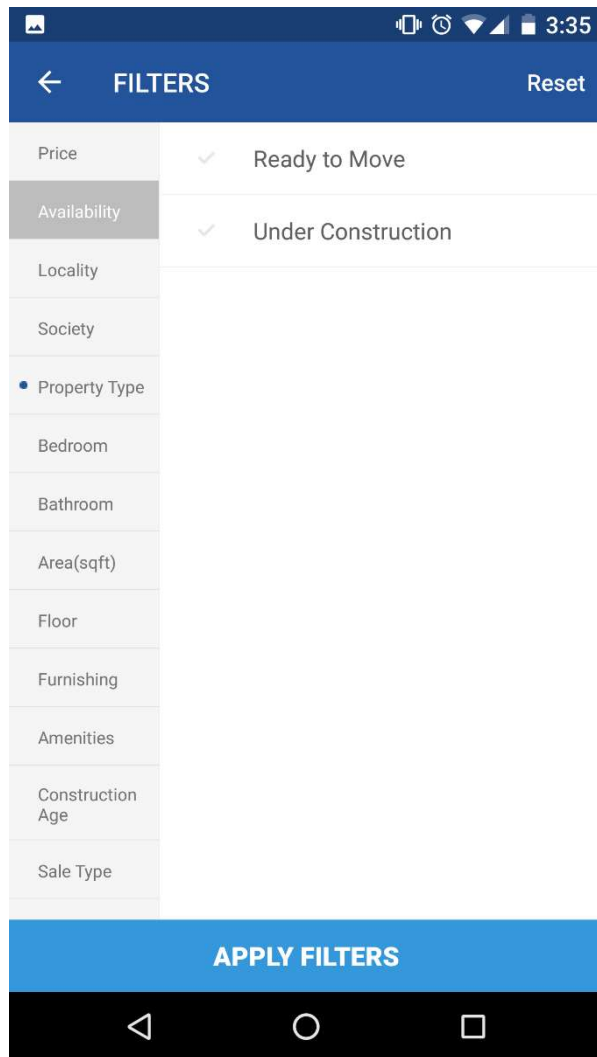
99acres cumulative cash loss (management estimate) at Rs 230 cr

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

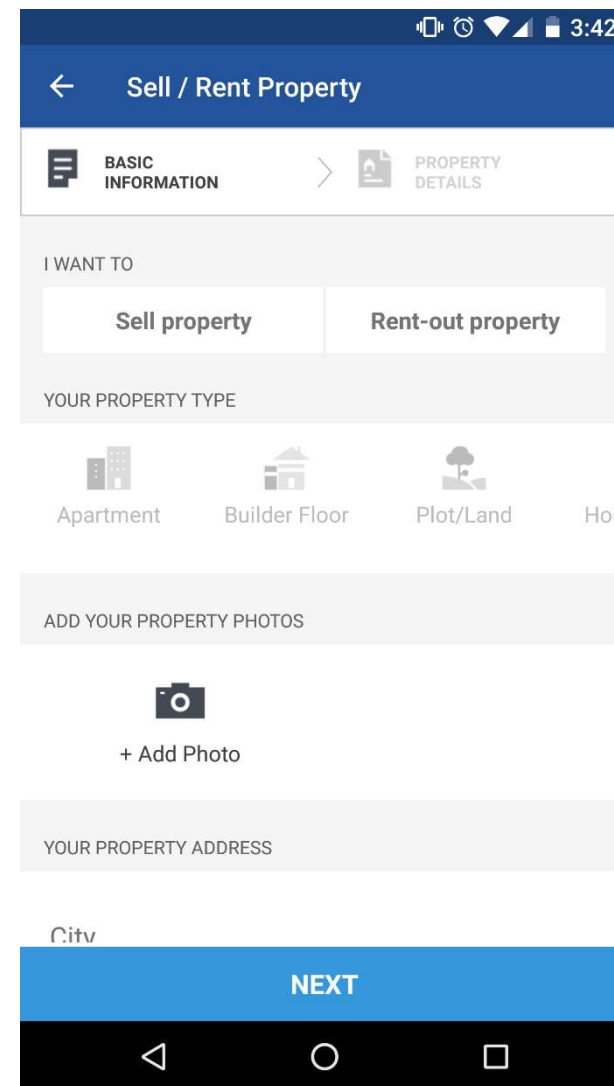
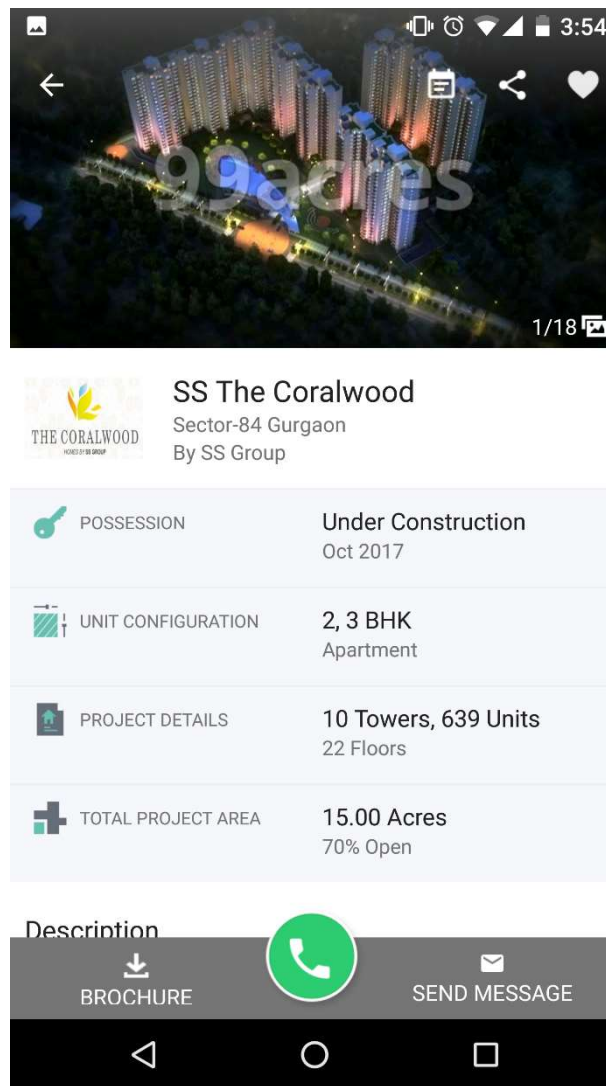
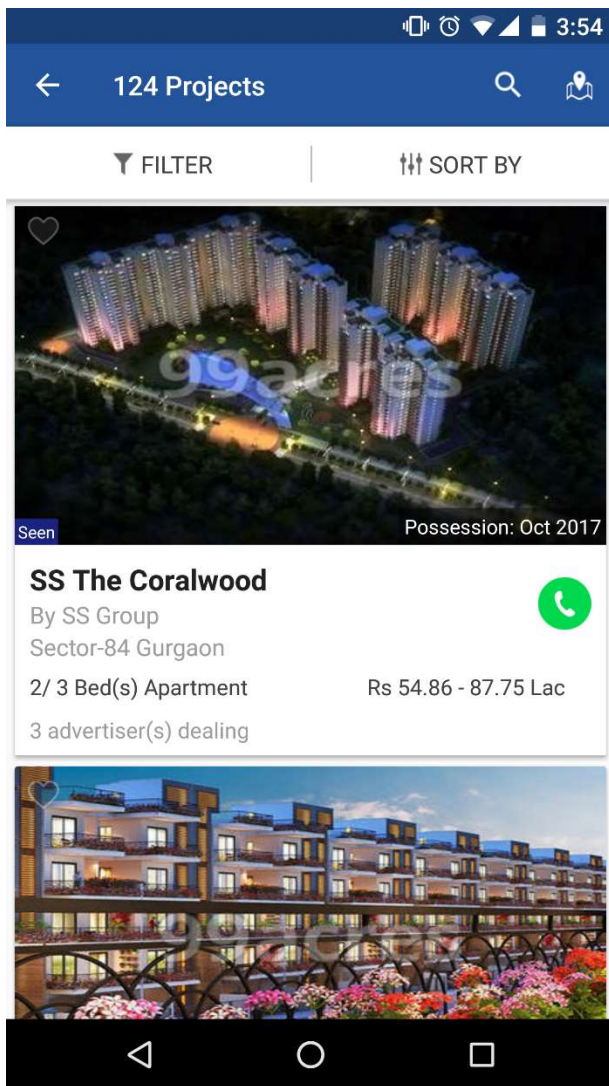
Mobile app – home screen, navigation and search

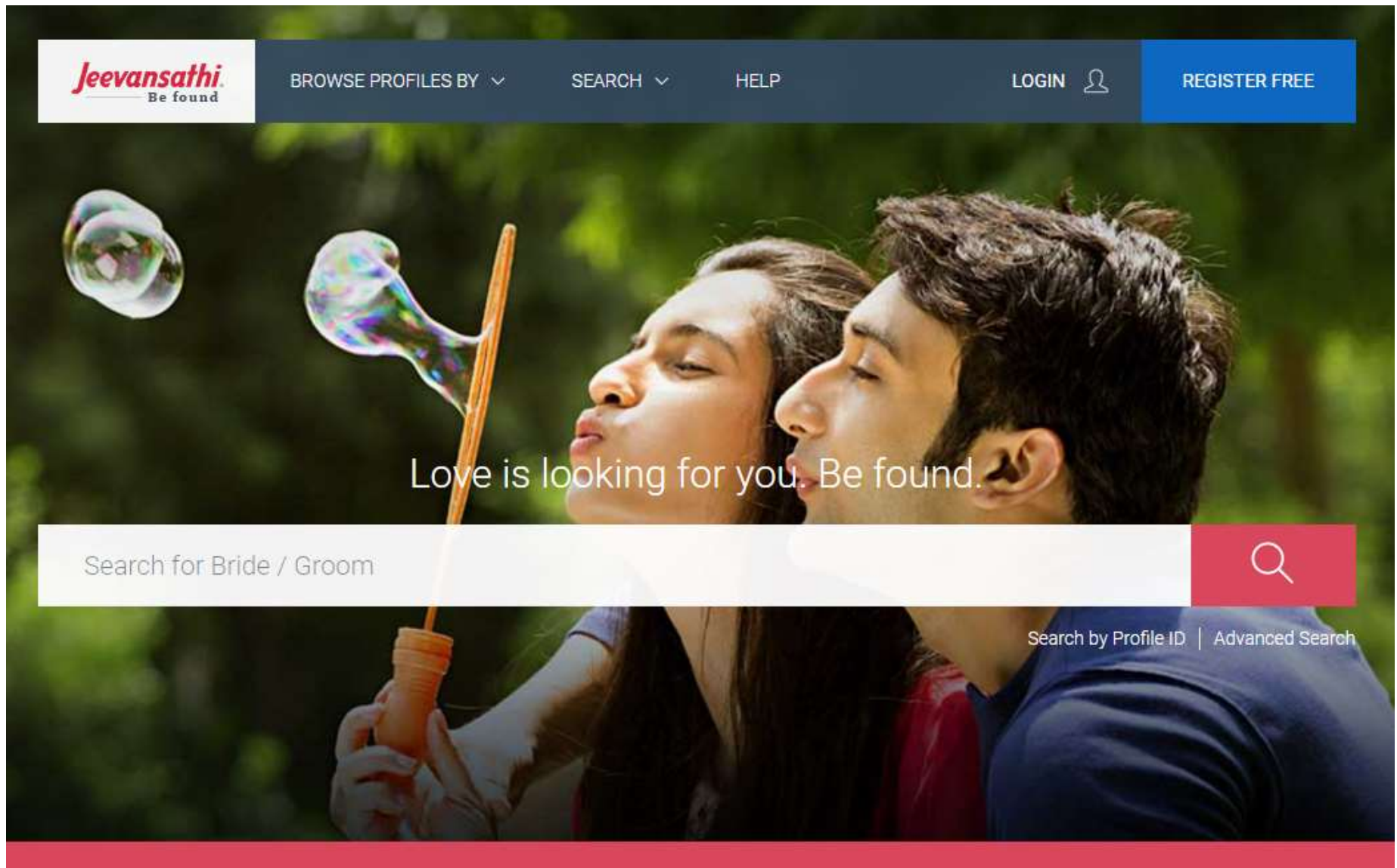


Mobile app - Property search results page, filter page, property detail page



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)

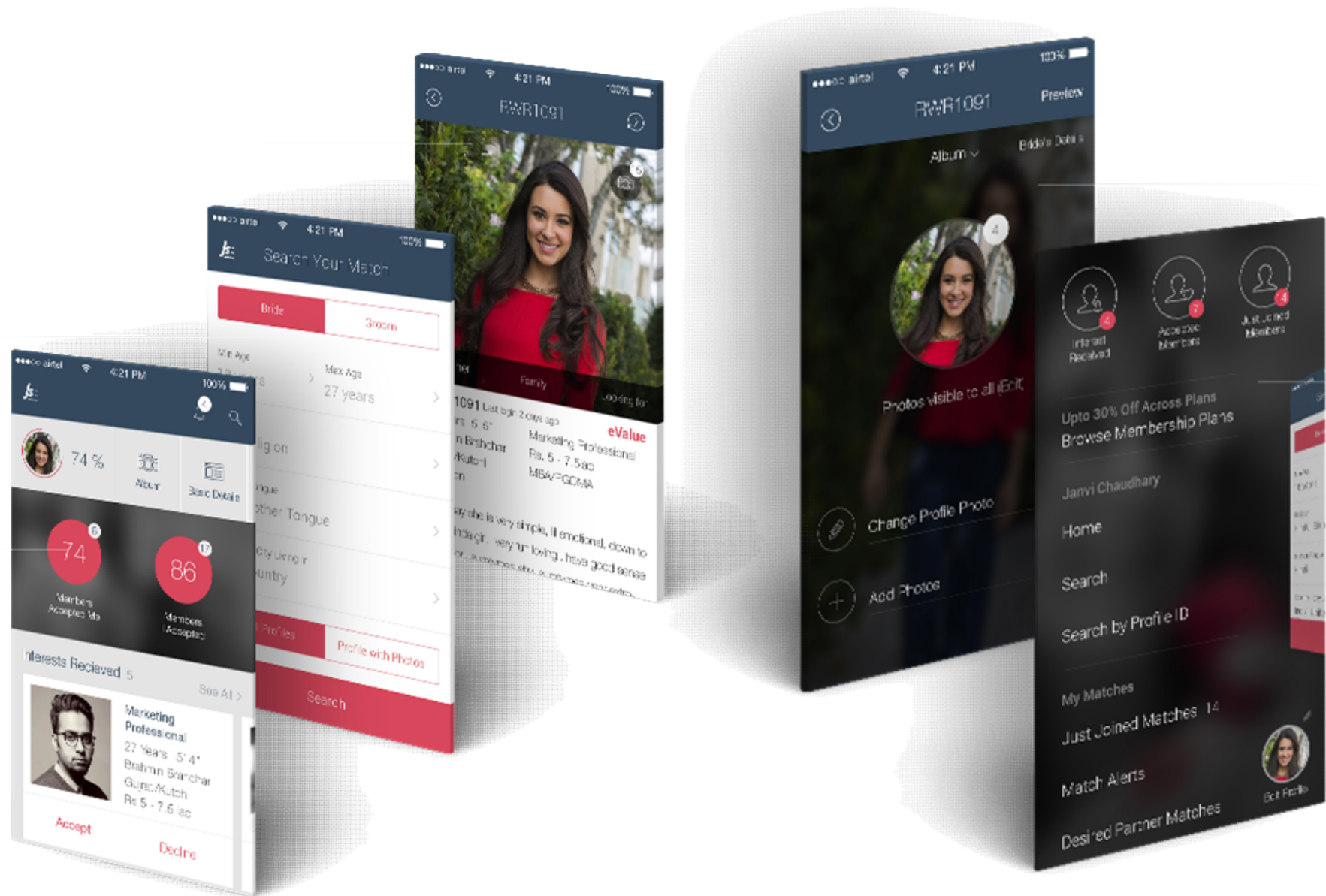
Jeevansathi business model

- **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 (10 centres operational)**
 - Walk in sales for matching services
- **Franchise - walk in centers**

Competition

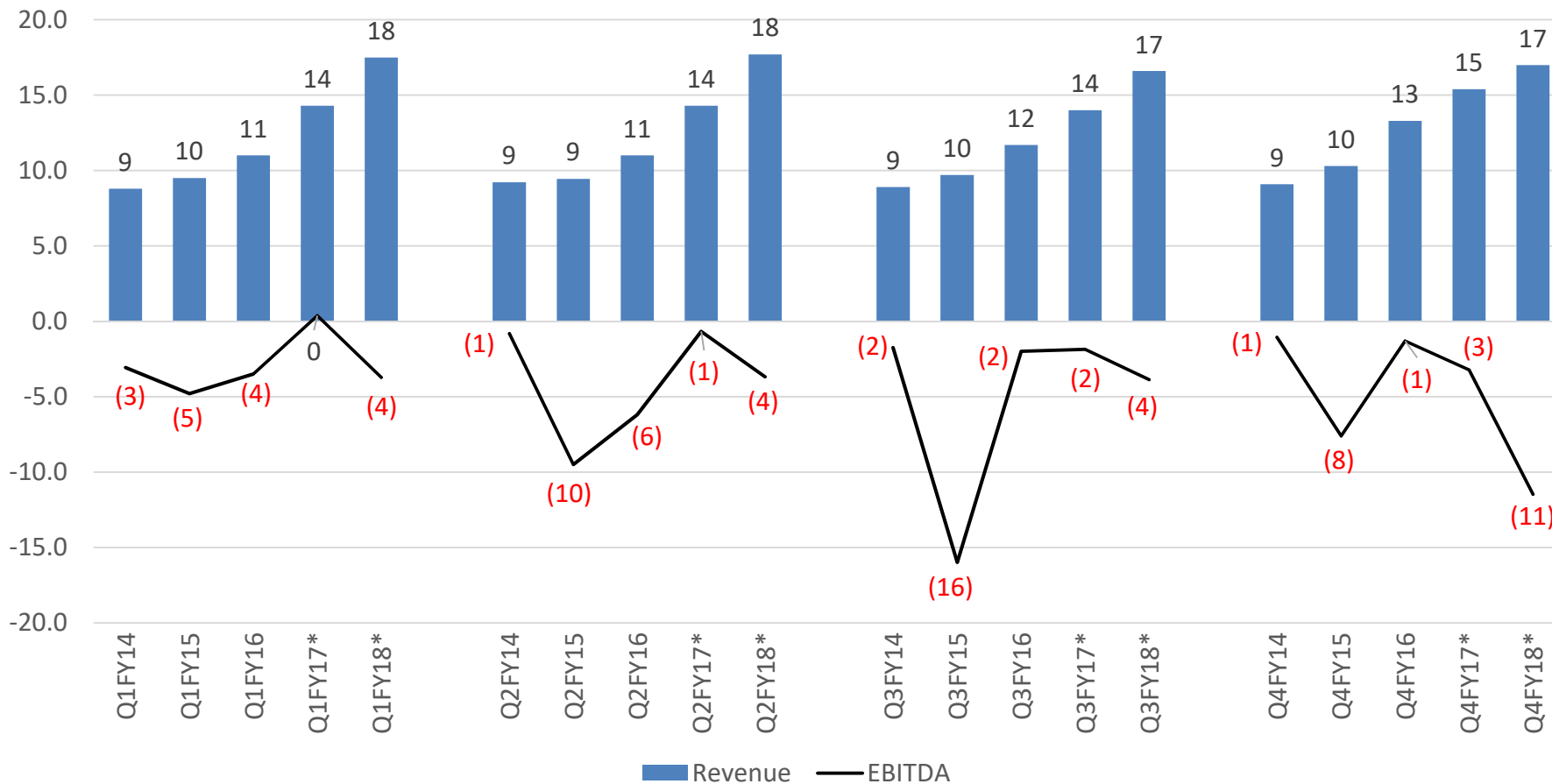
- Three main players – Bharat Matrimony is the leader, followed by Shaadi and then Jeevansathi
- Bharat Matrimony dominates states in south India and non resident Indians from these states
- Shaadi leads in Gujarat and Punjab and non resident Indians from these states
- Jeevansathi leads in certain North 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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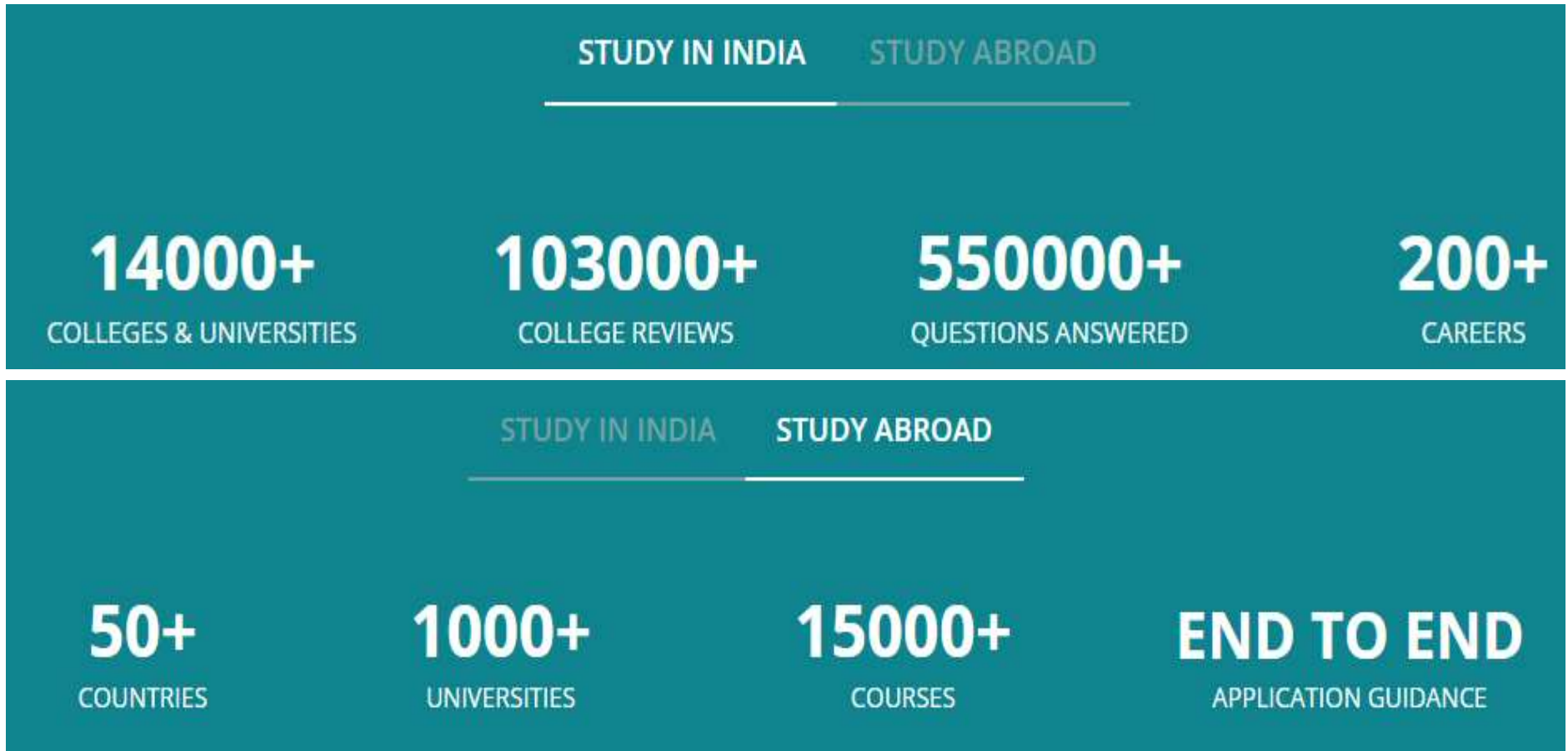
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Indus Business Academy (IBA), Bangalore [\(view details\)](#)

Featured	Garden City University Bangalore Emphasis on Life	Birla Global University Bhubaneswar MBA Admissions 2018	International Management Institute Kolkata 100% Placement Record	SRM Chennai Amaravati Delhi Ncr Apply Now SRMJEEE 2018	T. A. Pai Management Institute (TAPMI) Manipal Last Date to Apply 11th Feb 18
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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

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- **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

Mallikarjun | Batch of 2018 | Rating 3.2 / 5

👎 Doesn't recommend this course

Course reviewed : B.Arch

Related university links

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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

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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

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Or select from more courses

2. CHOOSE STUDY DESTINATION

Choose Country

More options

Any Exam Any Score

Any fees Sort by Sponsored

Continue

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Comprehensive Scholarship information for study abroad

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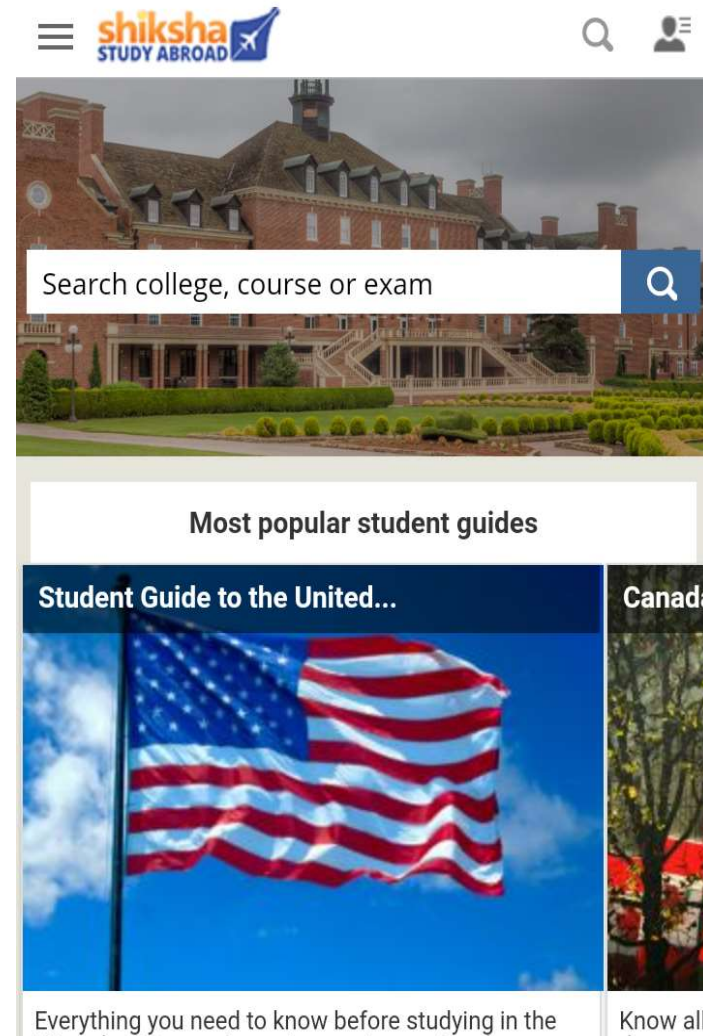
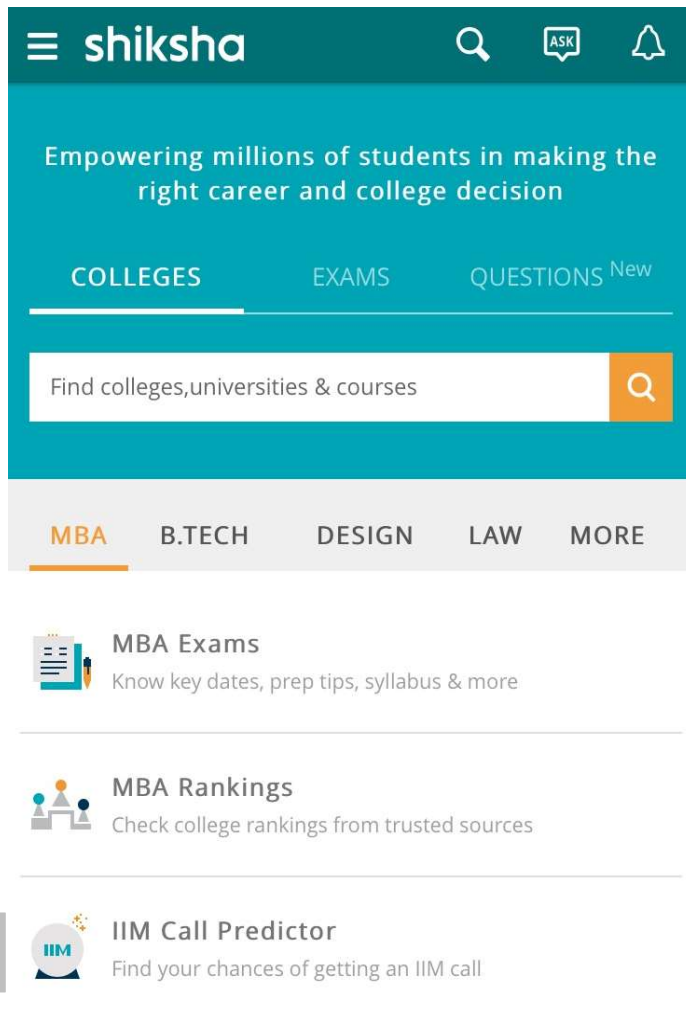
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Course Level Course Stream Study Destination Find Scholarships

Suggest a missing scholarship, win Rs 500!

Explore Scholarships by Country

Mobile sites



Competition

Domestic

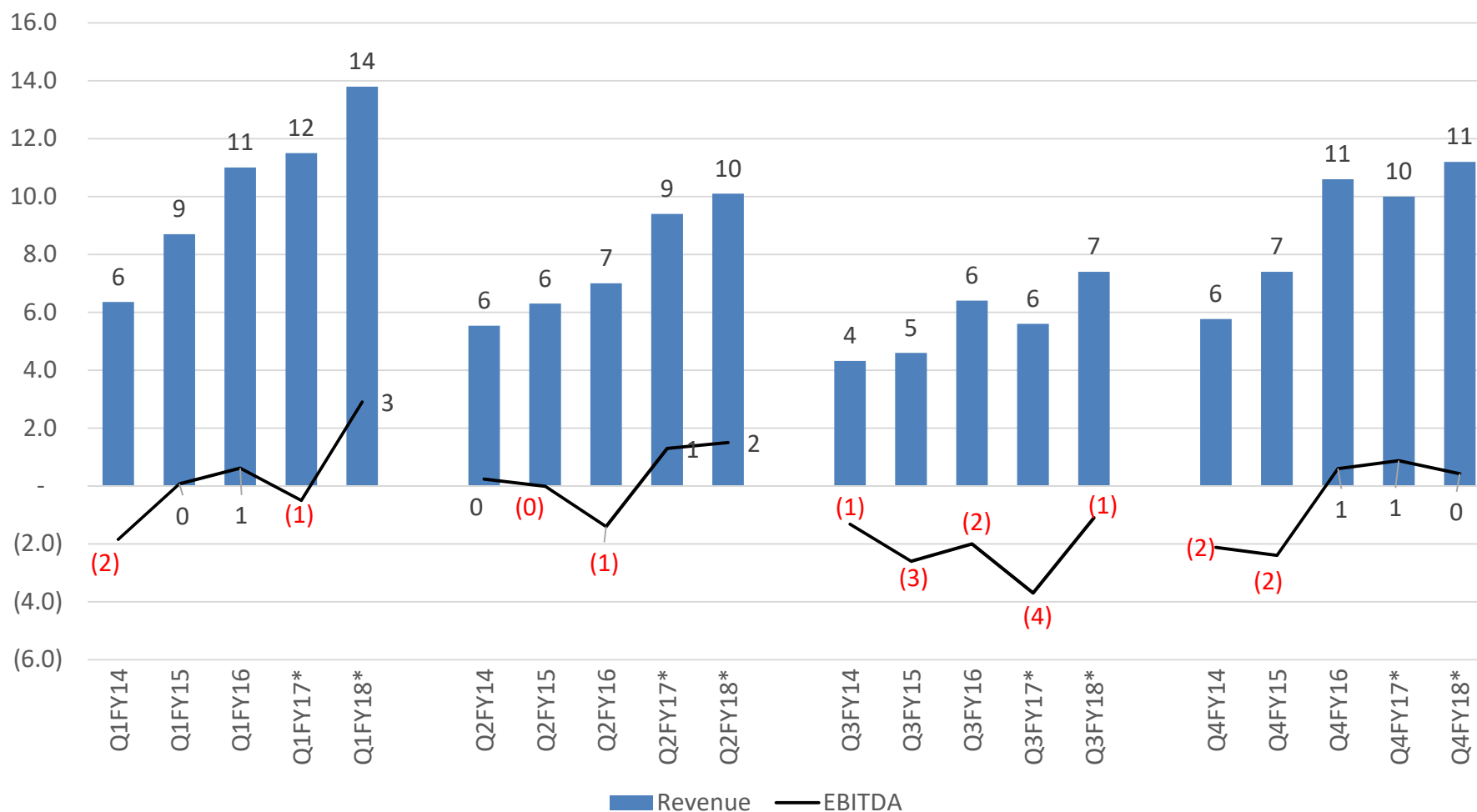
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 - Pagalguy
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 - Minglebox
 - Careers360
 - MBA Universe
 - CollegeDekho
 - CollegeDunia
 - Sarvgyan
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 - Others

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 - Masterstudies
 - Top mba / Top universities (QS)
 - Collegeboard
 - Yocket
 - Multiple Emerging start-ups
- Study Abroad consultants

Shiksha quarterly financials

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



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 status

As of Mar 31, 2018

Investee Company	Website	Book Value of Investment (Rs cr)	% Holding on fully diluted basis
Active			
Zomato Media Pvt Ltd.	www.zomato.com	*156	*31%
Applect Learning Systems Pvt Ltd.	www.meritnation.com	**135	66%
Etechaces Marketing and Consulting Pvt Ltd.	www.policybazaar.com	^67	^^10%
Canvera Digital Technologies Pvt Ltd.	www.canvera.com	15	62%
Happily Unmarried Marketing Pvt Ltd.	www.happilyunmarried.com	26	47%
Mint Bird Technologies Pvt Ltd.	www.vacationlabs.com	6	26%
Rare Media Company Pvt Ltd.	www.bluedolph.in	7	35%
Unnati Online Pvt Ltd	www.unnatihelpers.com	4	28%
VCare Technologies Pvt Ltd.	www.dirolabs.com	4	15%
Wishbook Infoservices Pvt. Ltd.	www.wishbooks.io	4	22%
NoPaperForms Solutions Pvt.Ltd.	www.nopaperforms.com	6	28%
International Educational Gateway Pvt. Ltd	www.univariety.com	13	30%
Agstack Technologies Private Limited	http://www.gramophone.in	6	25%
Sub Total		448	
Written off/ exited/ provisioned			
Studyplaces, Inc.	www.studyplaces.com	5	13%
Ninety Nine Labels Pvt Ltd.	www.99labels.com	28	47%
Nogle Technologies Pvt Ltd.	www.floost.com	3	31%
Canvera Digital Technologies Pvt Ltd.	www.canvera.com	106	-
Kinobeo Software Pvt Ltd.	www.mydala.com	27	42%
Green Leaves Consumer Services Pvt Ltd.	www.bigstylist.com	17	49%
Sub Total		186	
Total		634	

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

** Including Rs 26 cr of loan

^ Excluding Rs 16 cr monetized in Nov, 2015

^^ Being Info Edge's share of economic interest. Info Edge's 50.01% subsidiary, Makesense holds ~16.4% of PolicyBazaar in association with Temasek. Temasek had infused Rs 1.34 bn for its 49.99% stake in Makesense in Oct, 2015. Remaining 1.6% is held through a fully owned subsidiary of IE.

Investee companies financials

Rs. Crore

Investee Company	Operating revenue						Operating EBITDA					
	FY13	FY14	FY15	FY16	FY17	FY18	FY13	FY14	FY15	FY16	FY17	FY18
Partly owned subsidiary												
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)
Associate Companies												
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												
Total	108	191	331	475	664	937	(80)	(117)	(234)	(682)	(263)	(188)

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

Zomato

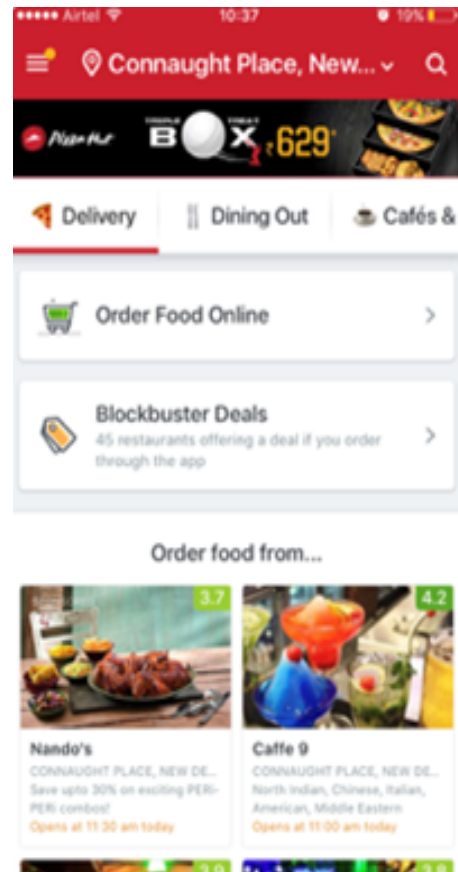
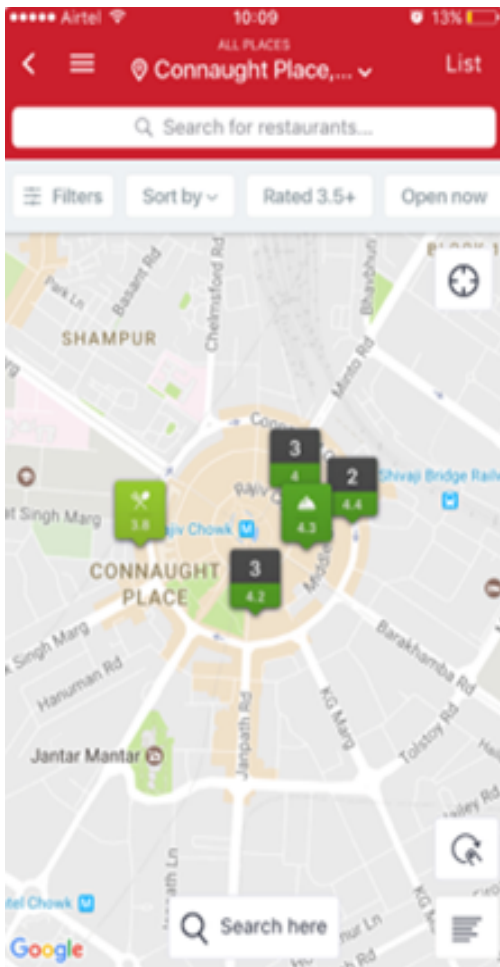


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Zomato

- Zomato is the largest restaurant search & discovery platform globally with presence in 24 countries
 - Food ordering service is available in India, UAE and Lebanon and is growing strongly
- Unique tech enabled, low cost feet-on-street model ensures exhaustive listings in a particular city and rich content ensures users are able to discover restaurants of their choice
- High volume of user generated content results in strong network effects

Rich content ensures that users are able to discover restaurants of their choice



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

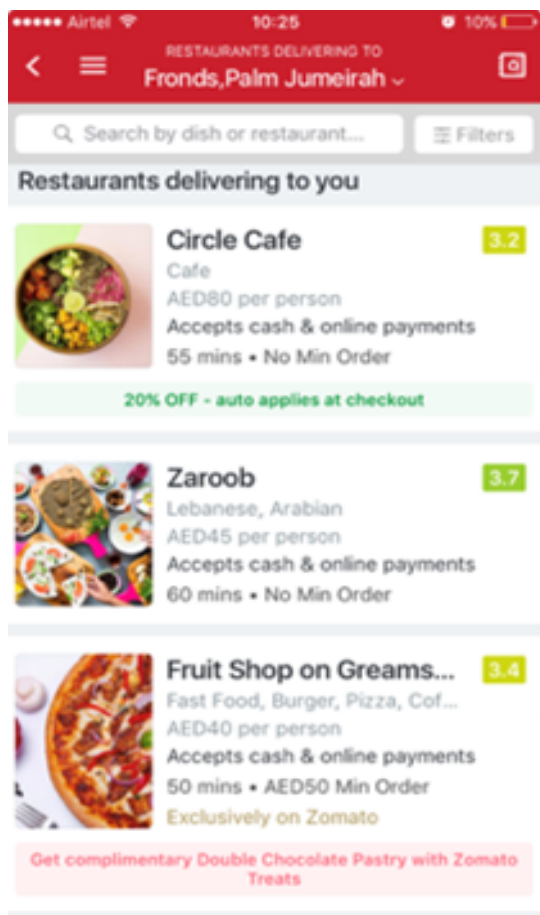
Customized Collections

Trend-based, curated group of restaurants

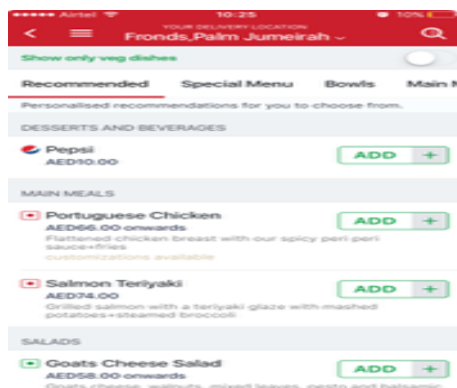
Advanced Search

Multi-dimensional filters for targeted search

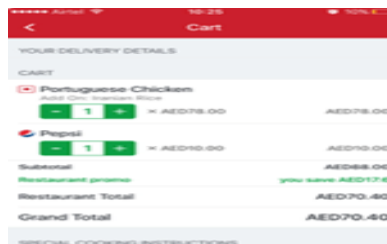
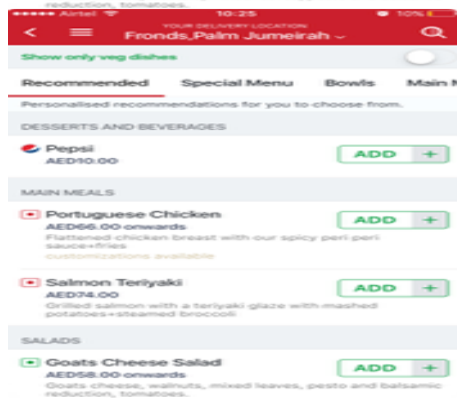
Food ordering at the click of a button helps users order-in with ease



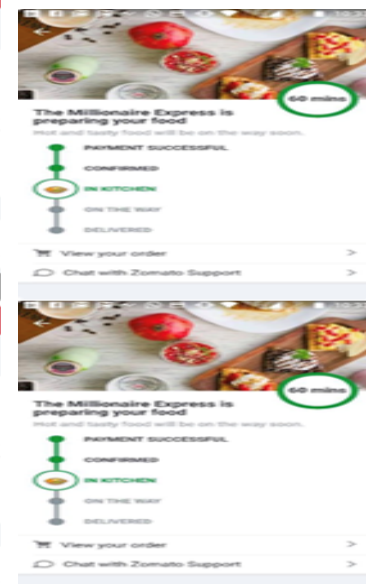
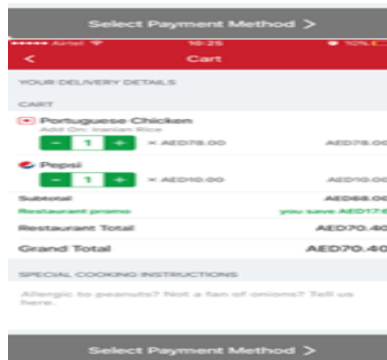
Choose from a list of delivery restaurants nearby



Select your favorite dishes & beverages



Pick your preferred payment method, and your food is on its way



Track your order status with real-time notifications

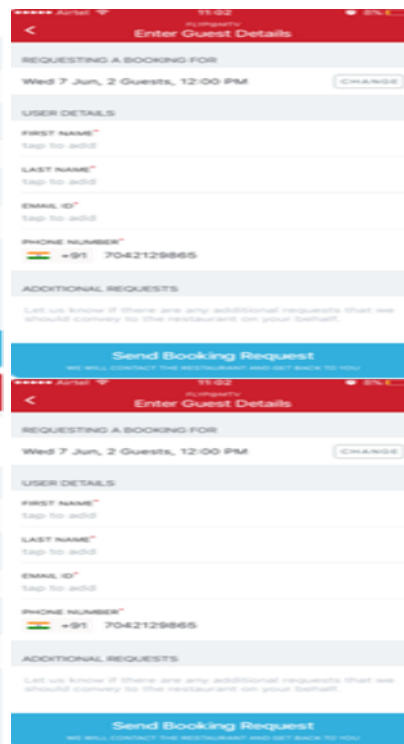
Table Reservations platform ensures users never have to wait again



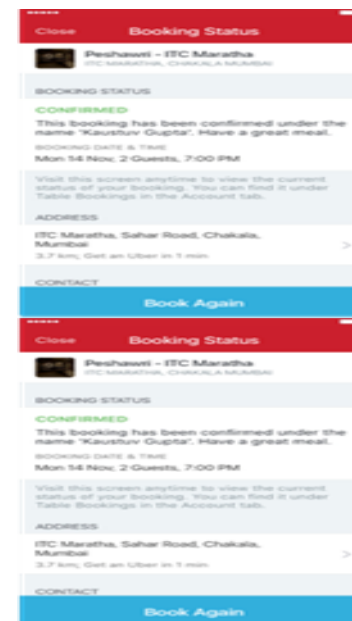
Pick your favorite place to dine out



Select date, time and no. of guests



Enter your details



Get a confirmation message and your booking is done

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 - 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

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Sanchita Verma, Class X
Apeejay School



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..Joyjit Chatterjee, Class XII



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Swapnil Lohani, IITJEE Advanced Qualified

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 - 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	54	BA Economics St. Stephens, PGDM IIM-A	Founder and Executive Vice Chairman	Lintas, Glaxo Smith Kline	1995
Hitesh Oberoi	45	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	43	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
Dinesh P Kumar	42	MBA	Executive Vice President- Sales	Notre Advertising	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	46	MBA, IRMA	Chief Human Resources Officer	Polaris	2006
Shalabh Nigam	45	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	39	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	39	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	42	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	40	BE (Honours), MREC; Rajasthan Technical University	Executive Vice President, Engineering – Tech Naukri	Snapdeal	2017
Rajesh Kumar Aggarwal	45	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	37	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

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BAML	Sachin Salgaonkar	+91 22 6632 8667	sachin.salgaonkar@baml.com
Centrum Broking	Ankit Kedia	+91.22.4215 9634	ankit.kedia@centrum.co.in
Citigroup	Gaurav Malhotra	+91.22.6631 9885	gaurav.a.malhotra@citi.com
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Macquarie	Alankar Garude	+91.22.6720 4328	alankar.garude@macquarie.com
Morgan Stanley	Parag Gupta	+91.22.6118 2230	parag.gupta@morganstanley.com
Motilal Oswal	Ashish Chopra	+91.22.3982 5424	ashish.chopra@motilaloswal.com
Nomura	Ashwin Mehta	+91.22.40374465	ashwin.mehta@nomura.com
Spark Capital	Soumitra Chatterjee	+91.44.4228 8151	soumitra@sparkcapital.com
UBS	Gautam Chhaochharia	+91.22.6155 6080	gautam.chhaochharia@ubs.com

Indicative list, subject to change

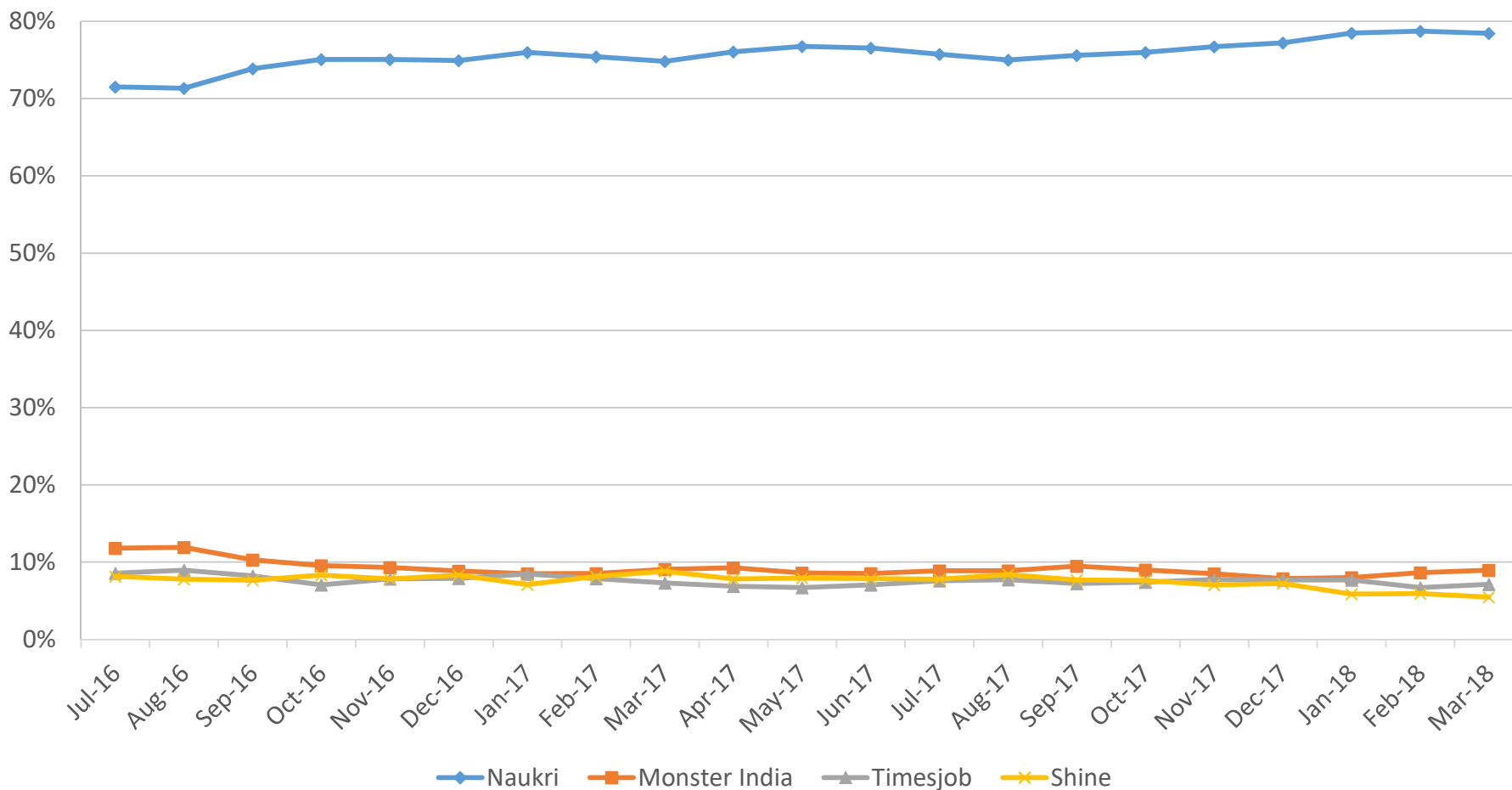
Investor relations contacts

Name	Chintan Thakkar	Vivek Aggarwal	Prince Poddar
Designation	CFO	SVP – Finance	Investor Relations
e mail	chintan.thakkar@naukri.com	vivek.aggarwal@naukri.com	prince.poddar@naukri.com
Telephone	+91 120 3082137	+91 120 3082007	+91 120 3082091
Fax	+91 120 3082095		
Address	Info Edge (India) Limited, B 8, Sector 132, Noida – 201 301, Uttar Pradesh, India		
Website	www.infoedge.in		

Annexures

Naukri has dominant traffic share

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

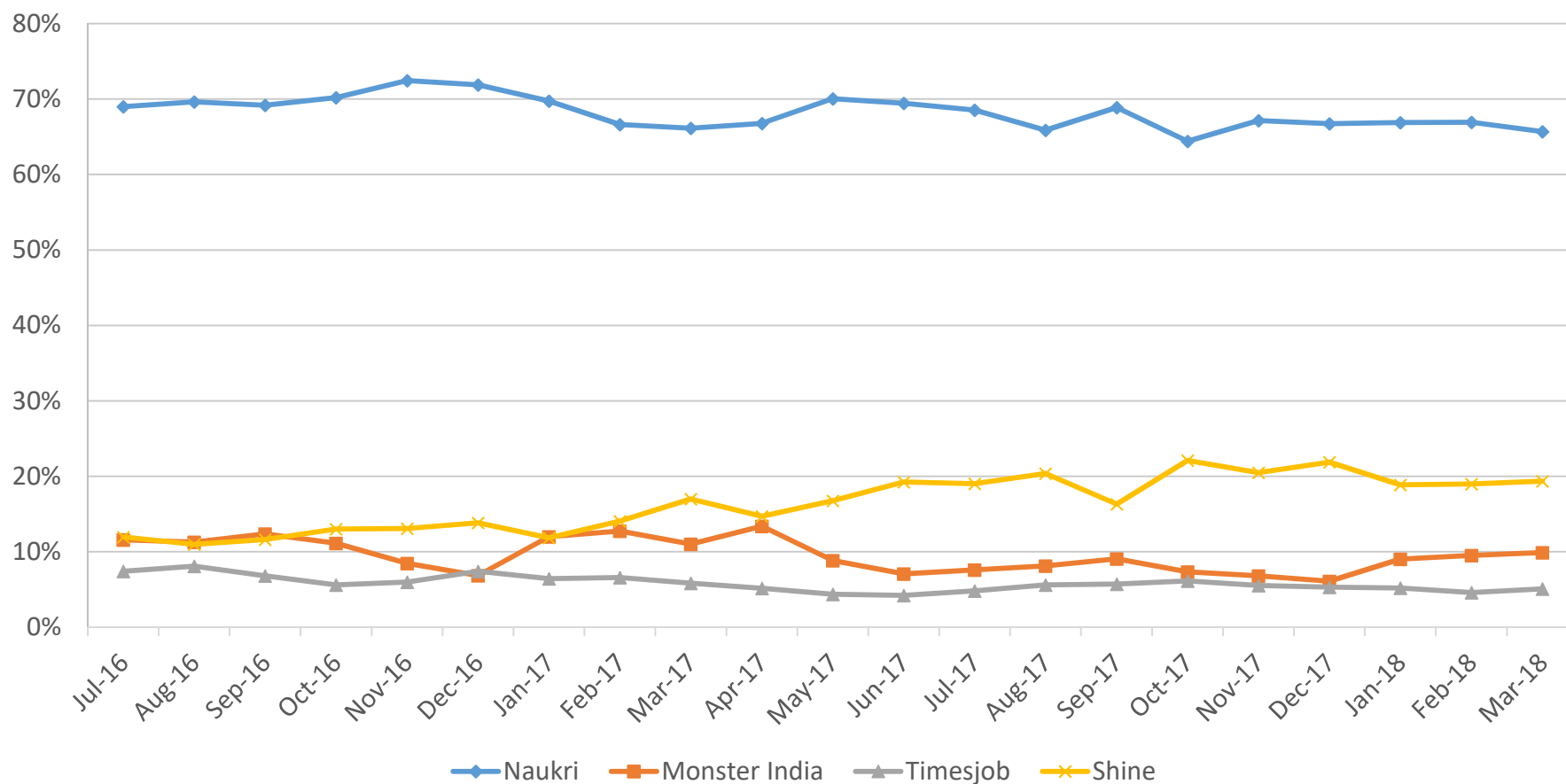


Source: SimilarWeb

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



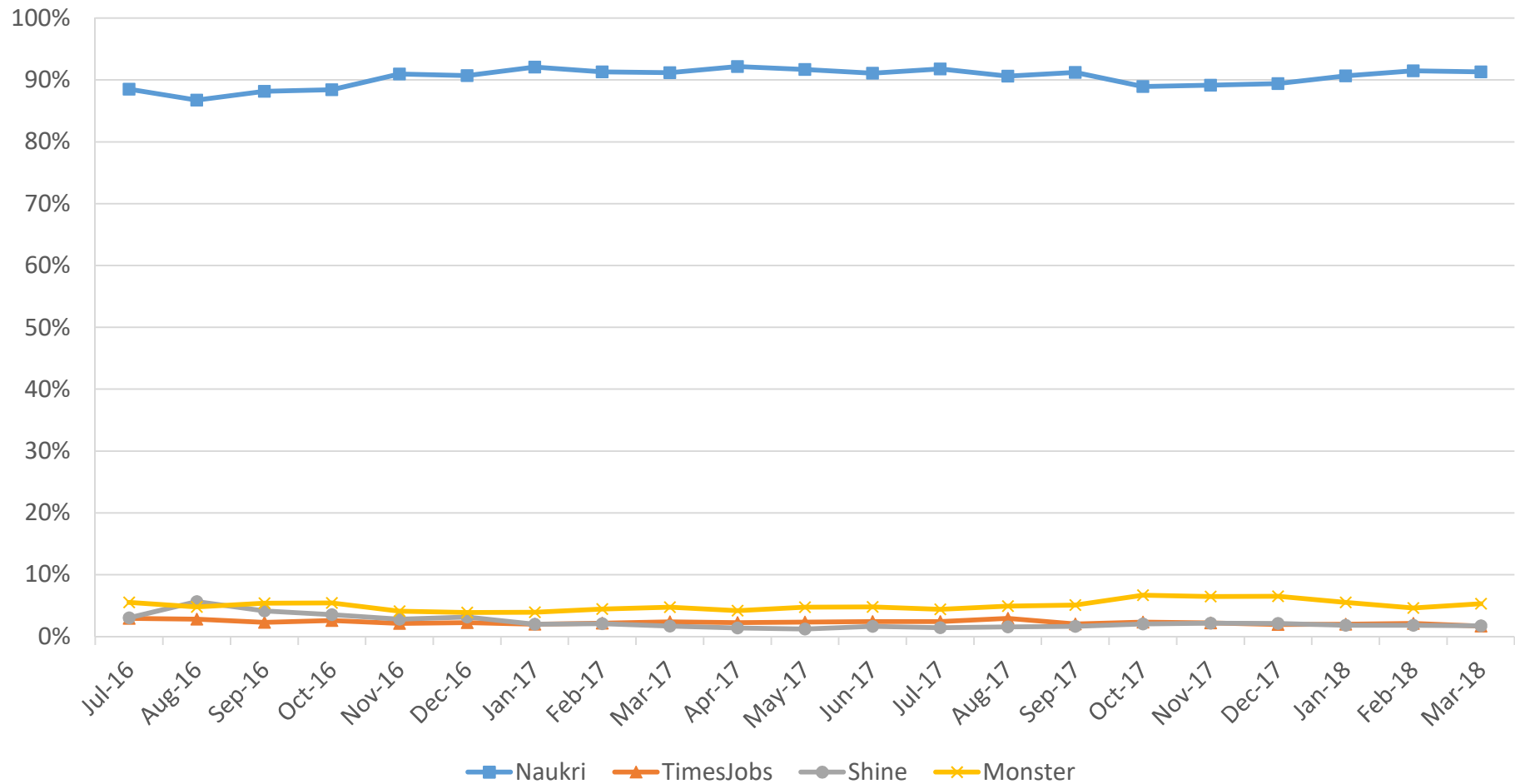
Source: SimilarWeb

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



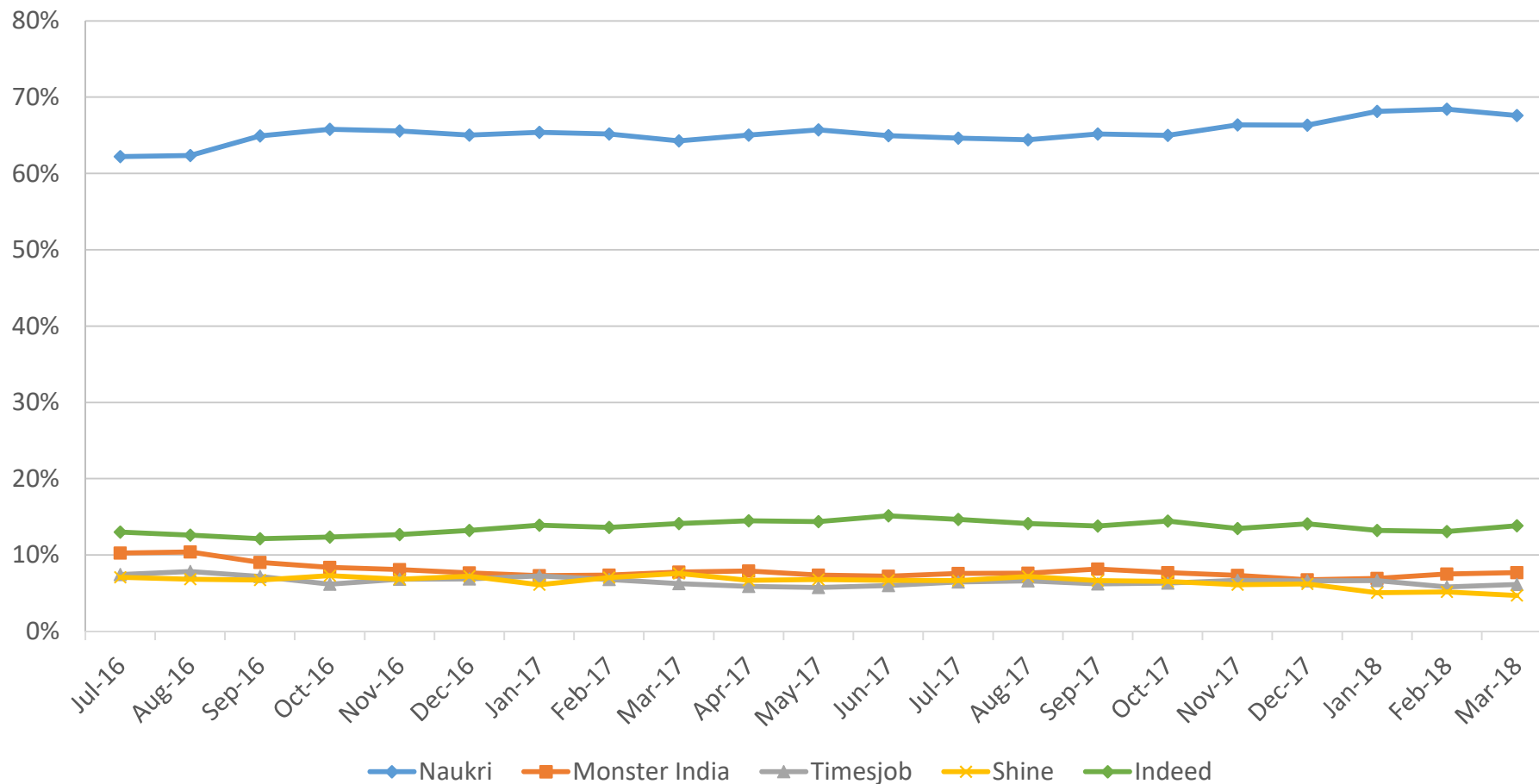
Source: SimilarWeb

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

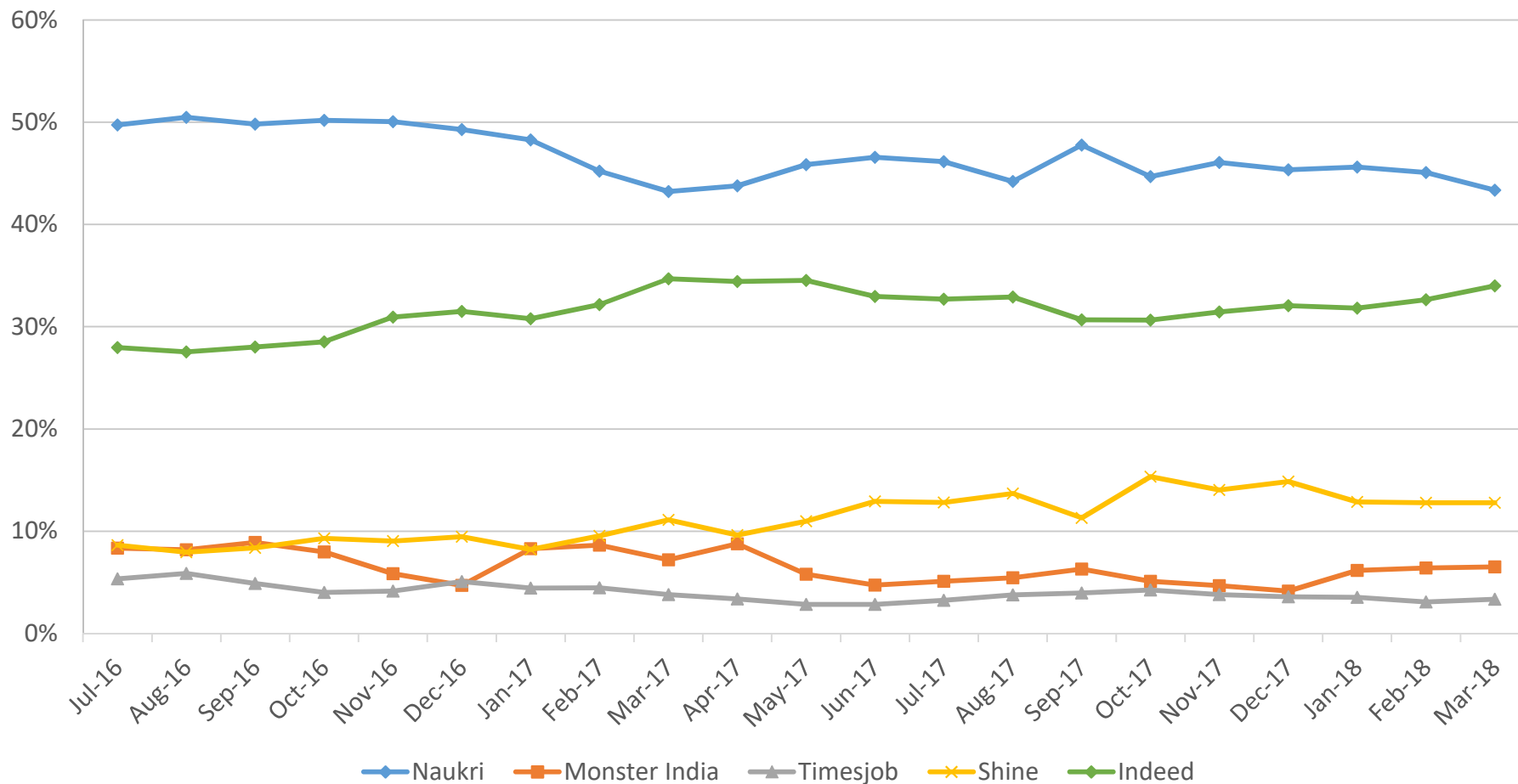


Source: SimilarWeb

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

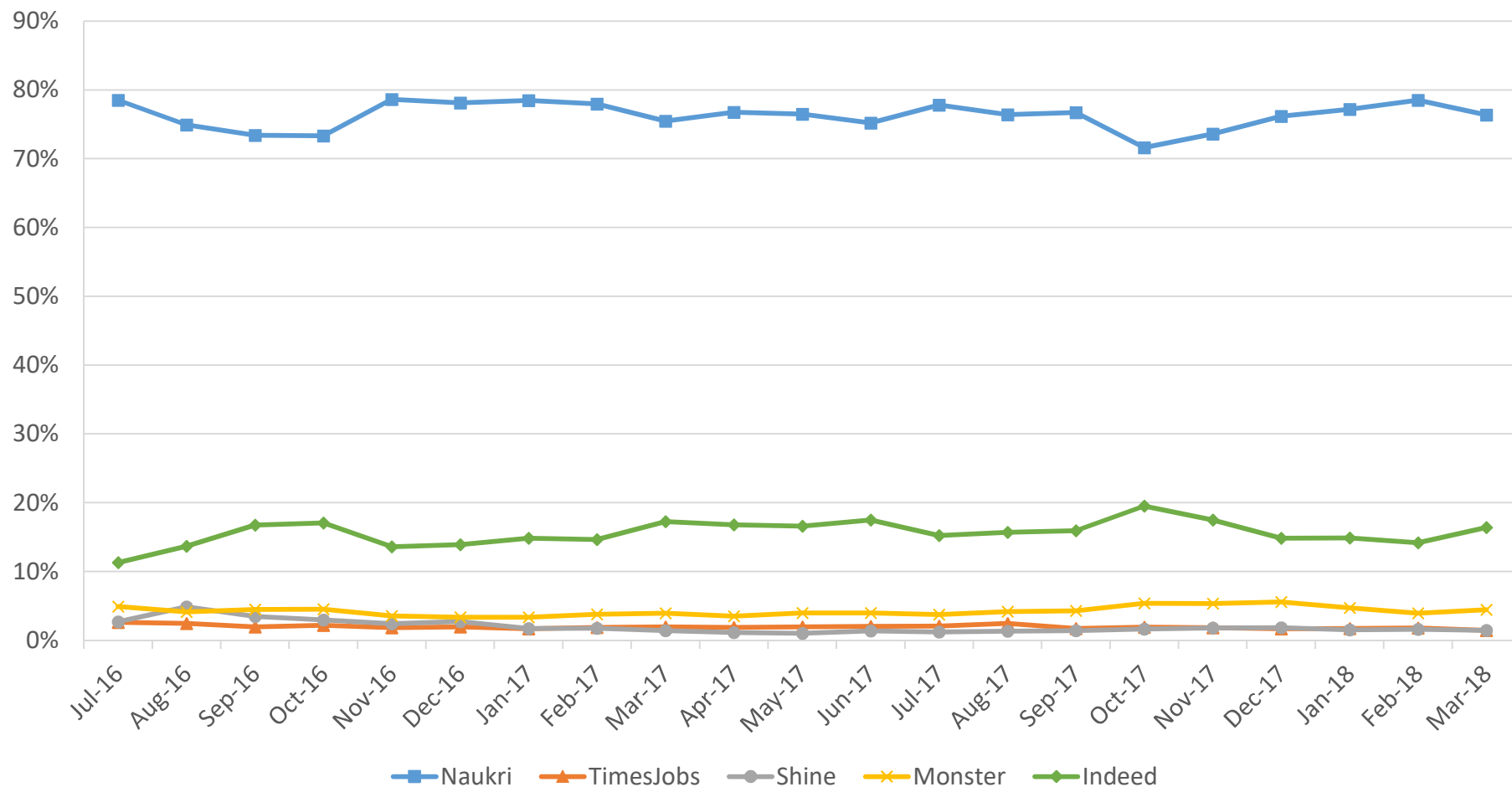


Source: SimilarWeb

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

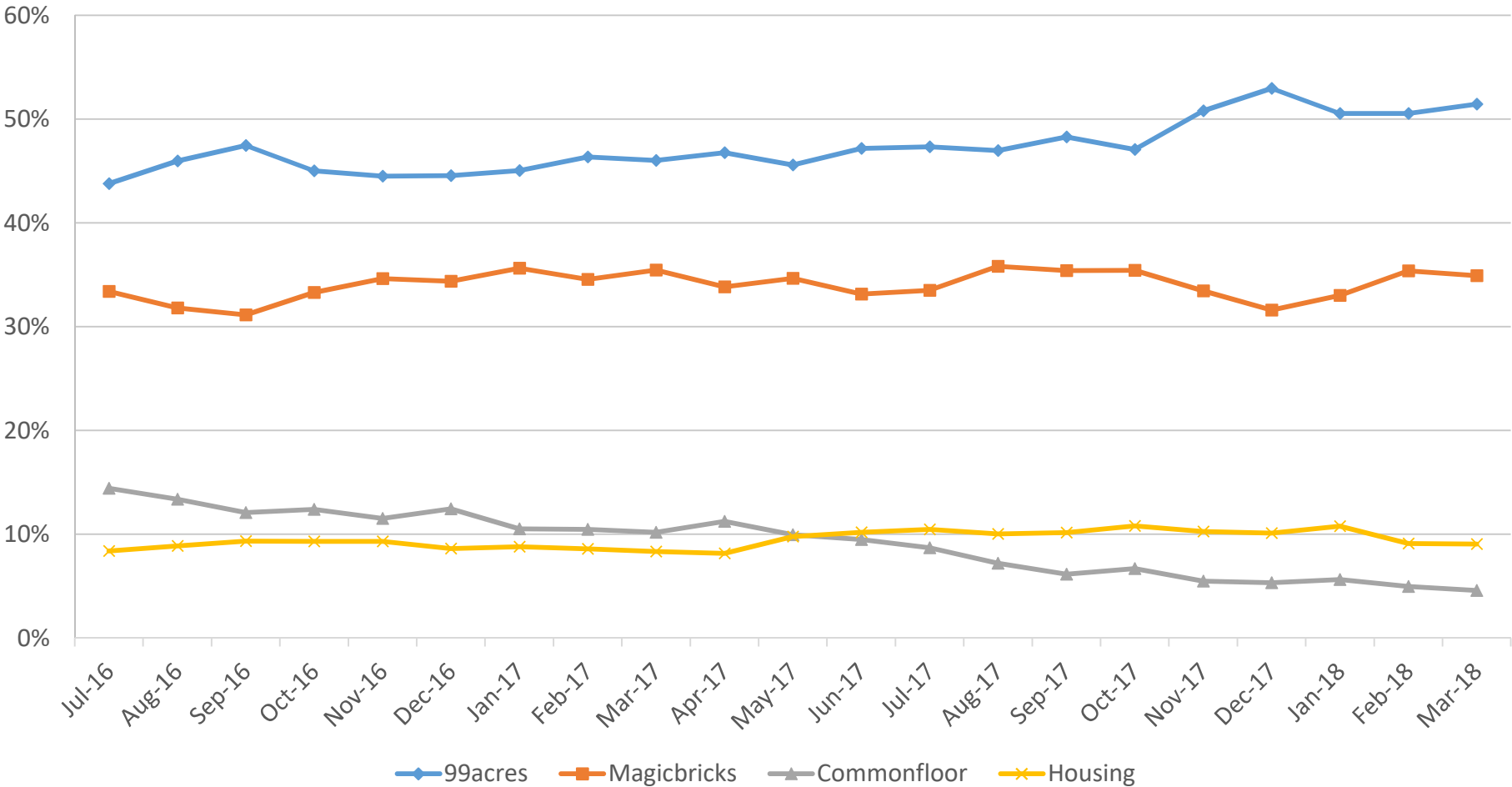


Source: SimilarWeb

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

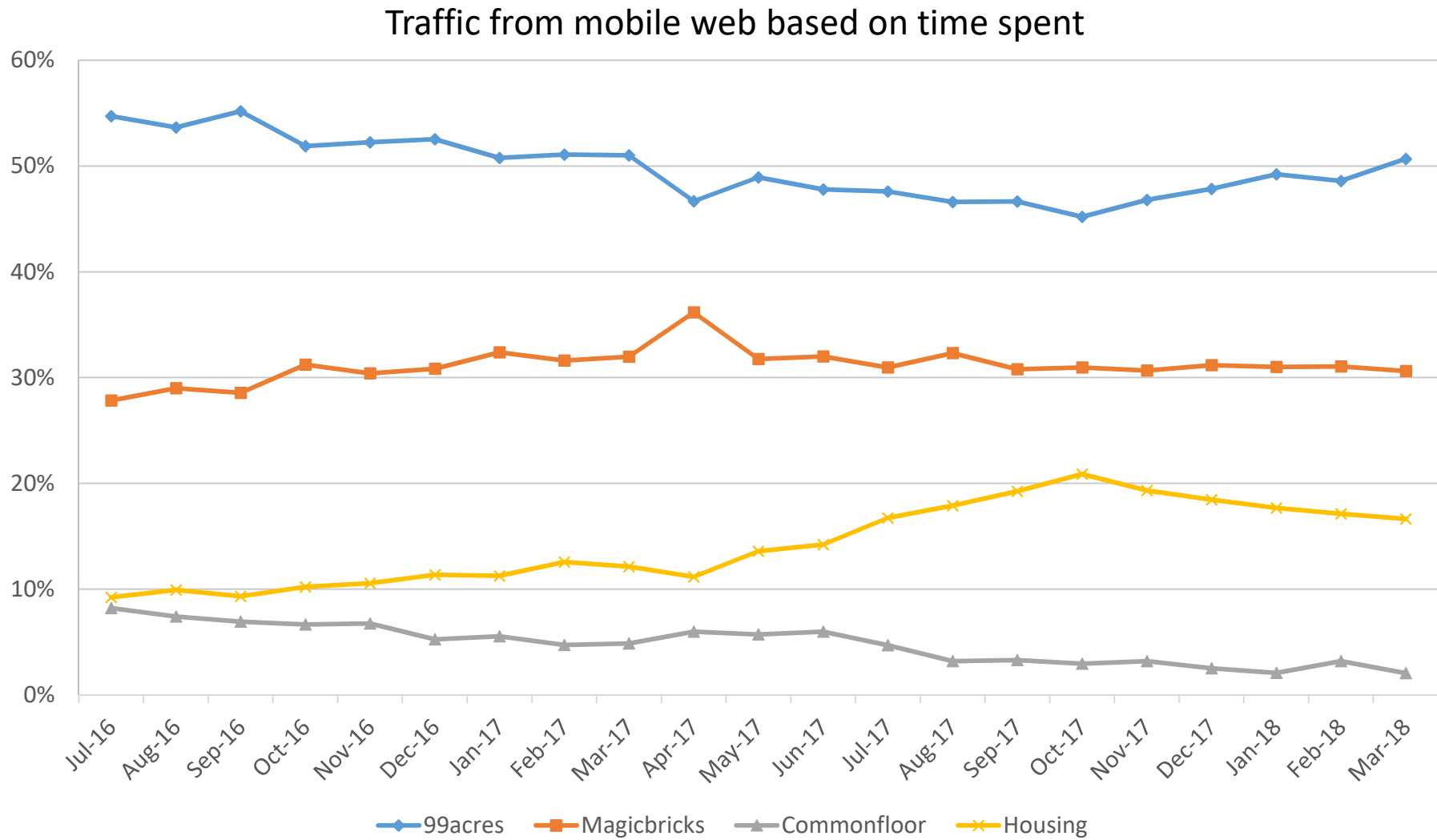
Time share of 99acres vs. competitors

Traffic from desktops and laptops based on time spent



Source: SimilarWeb

Time share of 99acres vs. competitors

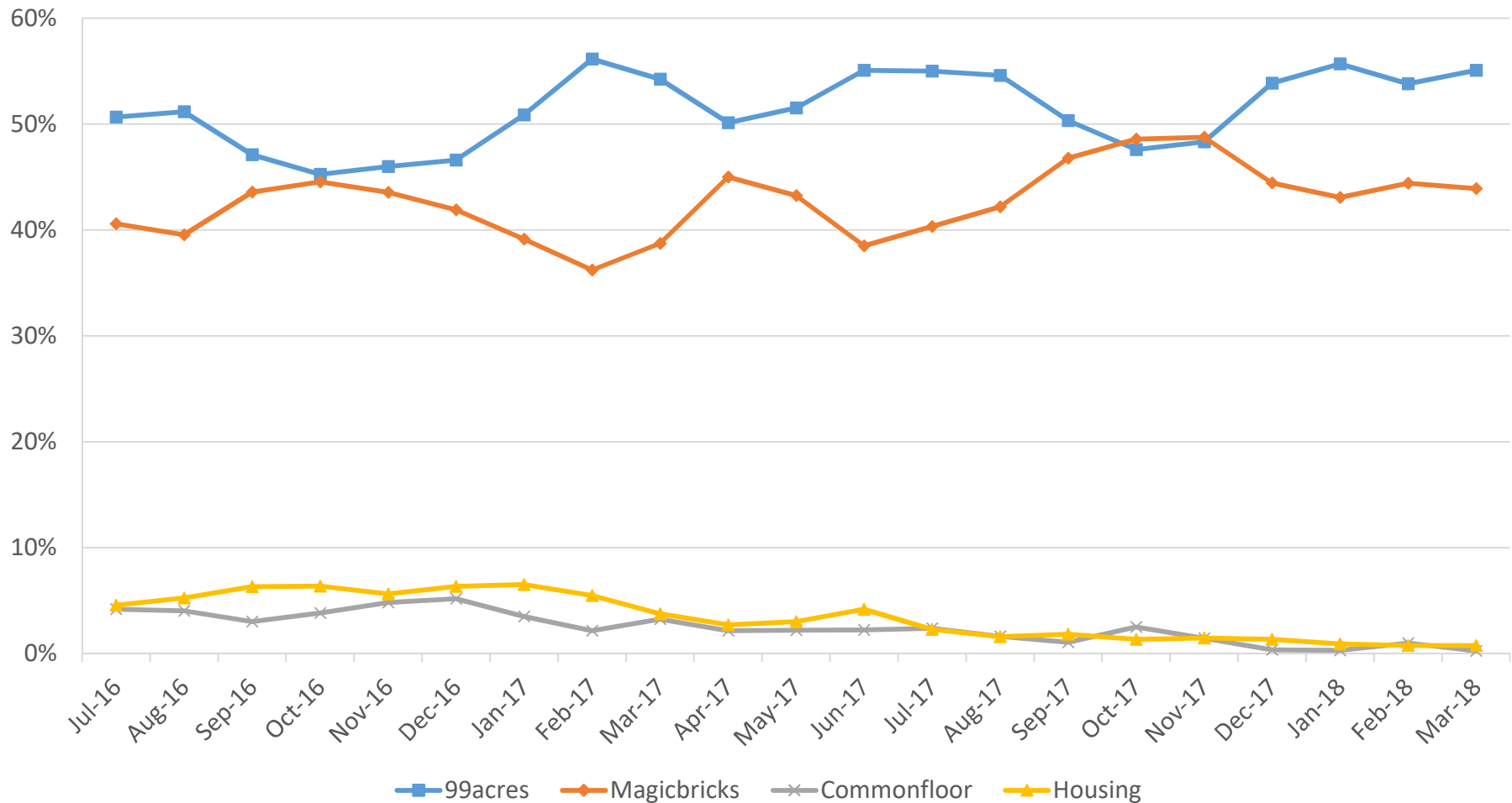


Source: SimilarWeb

* About 75% of 99acres' traffic comes from Android / iOS apps and mobile site

Time share of 99acres vs. competitors

Android app traffic based on time spent



Source: SimilarWeb

* About 75% of 99acres' traffic comes from Android / iOS apps and mobile site