

# Info Edge (India) Limited

India's internet classifieds company

May, 2016

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Data, numbers and statements made are what the company or investee company believes are a reasonable presentation 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 March 31, 2016 or for the quarter ended March 31, 2016, unless indicated otherwise

Q4 FY16 or Q4 FY15 - 16 means the period Jan 1, 2016 to Mar 31, 2016

FY16 or FY 15-16 or FY 2016 means the Financial Year starting April 1, 2015 and ending March 31, 2016

INR M means Indian Rupees in million

# Our online businesses



India's no. 1 jobsite  
Division of Info Edge



India's no. 3 matrimonial site  
Division of Info Edge



Job site focused on the  
Gulf market



India's leading real estate site  
Division of Info Edge



India's leading education listings site  
Division of Info Edge

# Strategic investments

**zomato**.com

India's leading restaurant ratings and review site

Shareholding ~47%\*

meritnation.com  
school made easy

India's leading education site for school children

Shareholding ~59%\*

**mydala**.com  
We Bargain. You Gain.

Deals and discounts site with a merchant platform

Shareholding ~42%\*

**policybazaar**.com<sup>®</sup>  
compare kiya kya?

India's leading financial products comparison site

Shareholding ~10%\*^

**Canvera**™  
preserving memories

India's leading site for professional photographers

Shareholding ~49%\*



Designing and selling fun products

Shareholding ~44 %\*

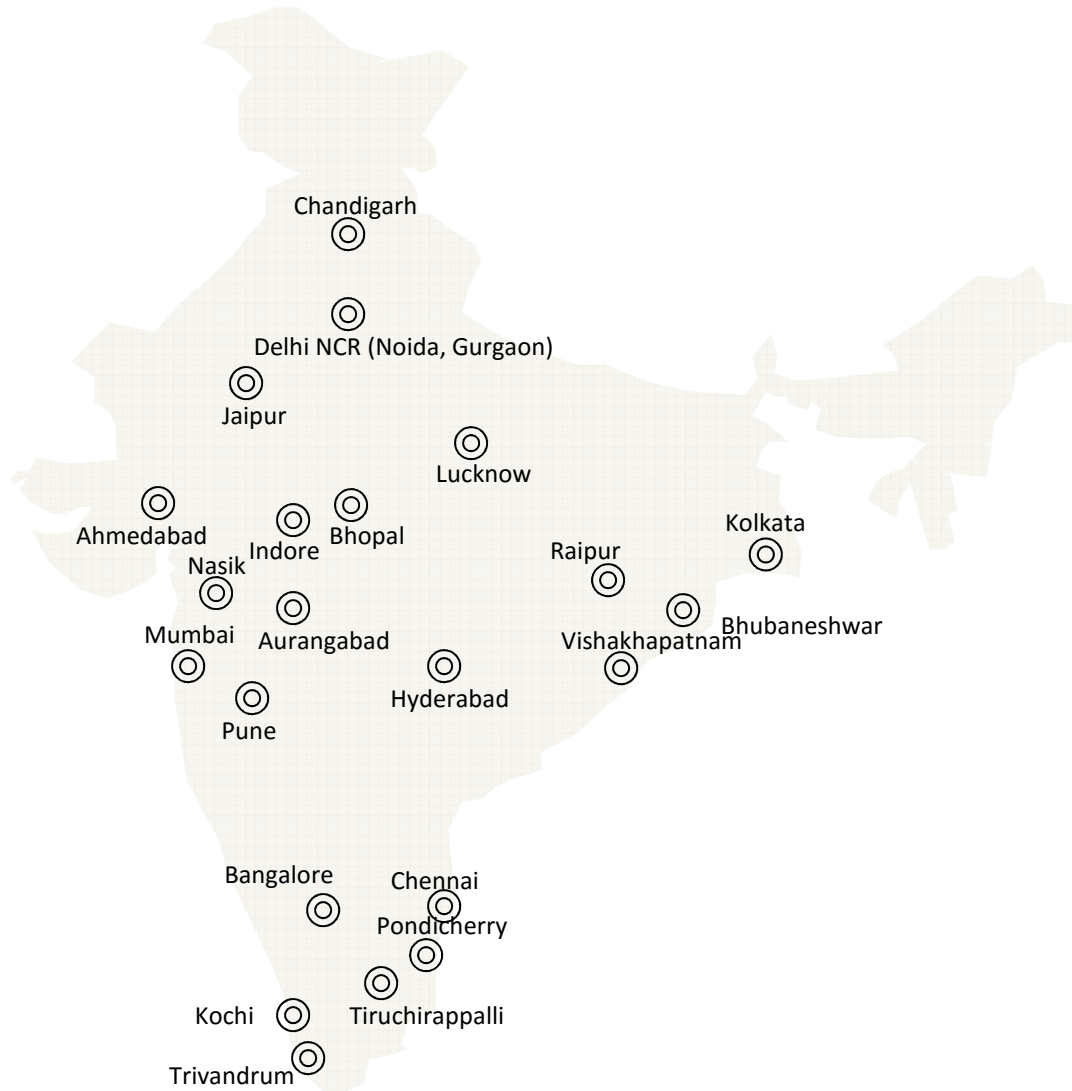
\* Approximate shareholding on fully disbursed and converted basis, held directly or indirectly (through subsidiaries, associates or affiliates). The % shareholding may or may not translate into an equivalent economic interest on account of conditions in the investment/ shareholders agreements.  
^ being Info Edge's proportionate share of economic interest. Info Edge's 50.01% subsidiary, Makesense holds nearly 20% of Policybazaar in association with Temasek. Temasek had infused a total of Rs 1.34 bn for its 49.99% stake in Oct, 2015

# Our brands are market leaders

- Internal businesses
  - Naukri
  - 99acres
  - Shiksha
- Strategic investments
  - Zomato
  - Policybazaar
  - Meritnation
  - Canvera
  - Mydala

# Nationwide sales/customer interface infrastructure

Info Edge sales offices illustrative map



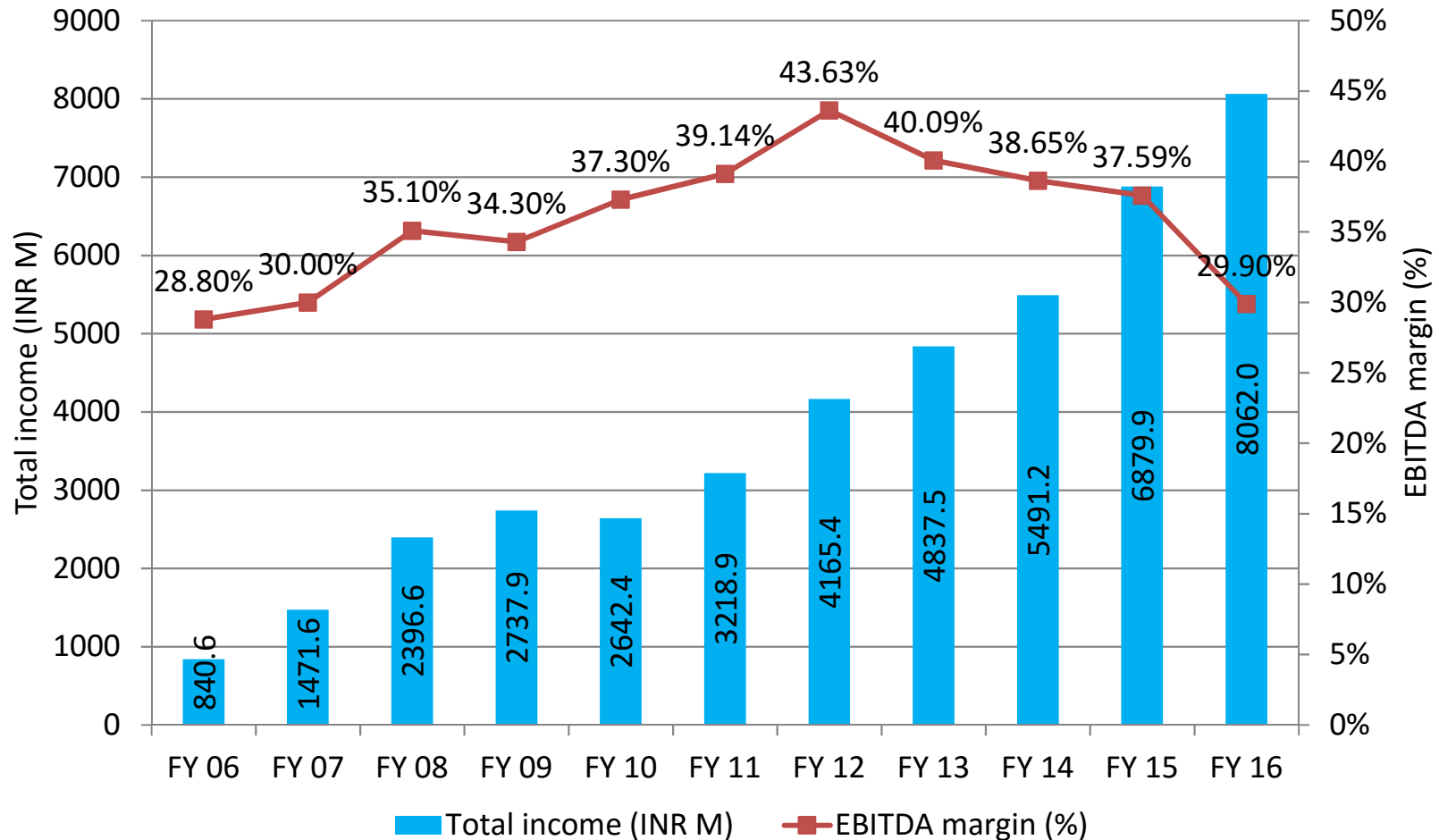
## Key Observations

- Nation wide coverage through 64 company branch offices in 44 cities in India
- ~ 2866 sales/ servicing/ client facing staff or 68% of the company's\* workforce of ~4195
- Only "dot com" player with this kind of sales organization

\* Including allcheckdeals, a wholly owned subsidiary

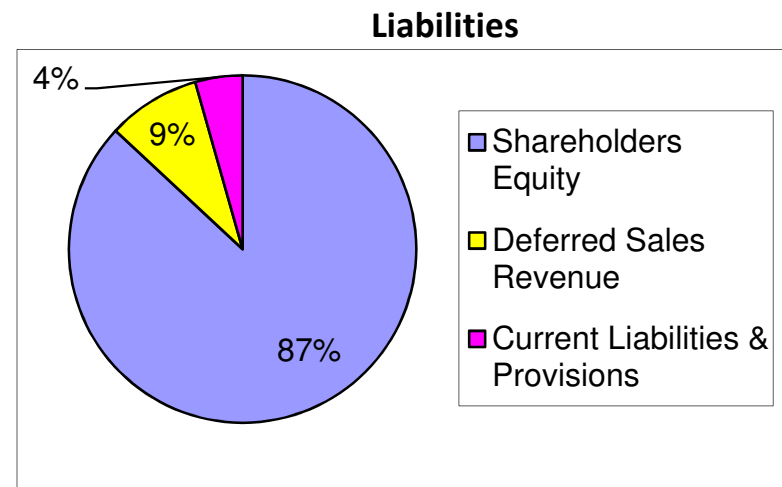
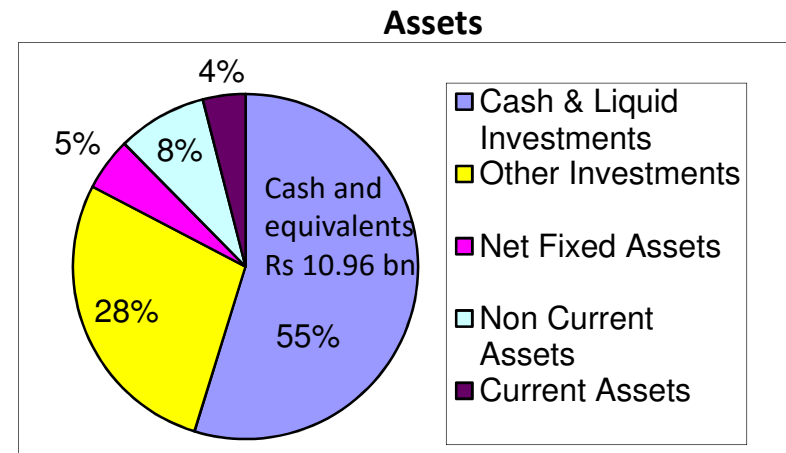
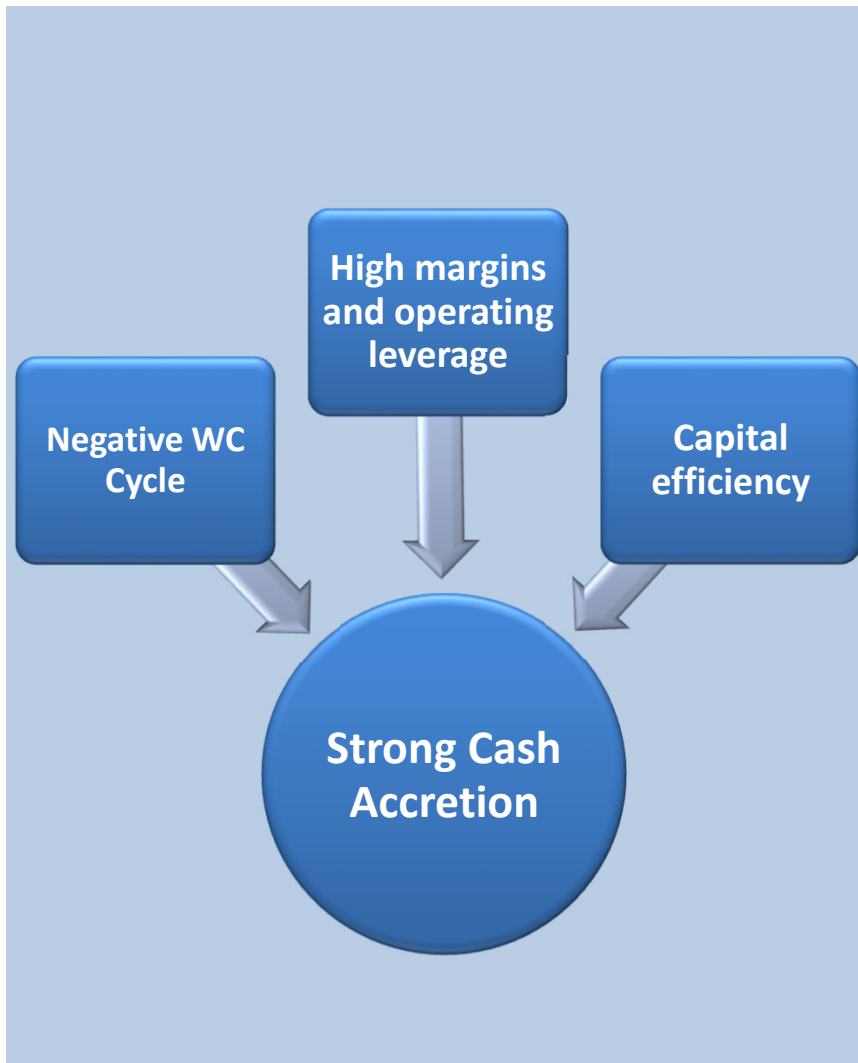
# Strong financial performance track record

Total Income and EBITDA margin for the standalone entity, 2006 – 2016



Margins declined in FY 16 mainly on account of increased investments in 99 acres

# Capital efficiency, high EBITDA margins and negative working capital have led to a strong balance sheet



As of March 31, 2016



# Board of Directors

## Whole time

### **Sanjeev Bikhchandani (52)**

Founder and Executive Vice  
Chairman

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

Previously with GlaxoSmithKline

### **Hitesh Oberoi (43)**

Managing Director and CEO

B.Tech IIT Delhi,  
PGDM IIM-B

Previously with HLL (Unilever)

### **Chintan Thakkar (49)**

Director and CFO

Chartered Accountant  
Previously with Computer  
Associates, India

## Non Executive

### **Kapil Kapoor (51)**

Chairman & Non Executive  
Director

B.A.Econ, PGDM IIM-A

Previously COO (Global Business  
Development), Timex Group

## Independent

### **Saurabh Srivastava (70)**

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

### **Arun Duggal (69)**

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

### **Bala Deshpande (49)**

Independent Director

MA Econ., MMS JBIMS

Sr. MD, New Enterprise  
Associates (NEA)

### **Naresh Gupta (49)**

Independent Director

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

Previously MD, Adobe India

### **Sharad Malik (52)**

Independent Director

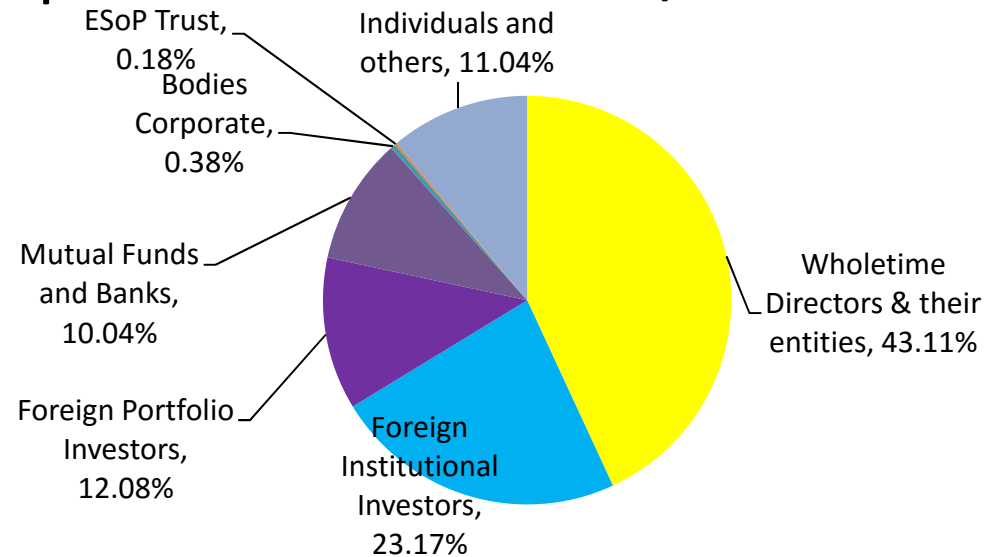
B Tech IIT-D, MS, PhD, University  
of California

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

# Corporate governance

- Independent Directors are a majority on the Board
- Separation of Chairman and CEO role
- Non Executive Chairman
- Statutory Audit performed by PWC
- Internal Audit performed by an external firm
- Audit committee comprises of only Independent Directors
- Disclosure of quarterly balance sheet and cash flow statements though not mandatory in India
- Formal dividend policy
- Whistle blower mechanism

~43% shareholding is with the Founding management group and ~35% with FIIs/ FPIs (as of Mar 31, 2016)



Matthews	3.33%
HDFC Mutual Fund	3.32%
Nalanda India Equity Fund	3.19%
Amansa Holdings Pvt Ltd.	3.01%
Aranda Investments (Mauritius) Ltd.	2.71%
WF Asian Smaller Companies Fund	1.57%
Axis Mutual Fund	1.34%
Reliance Mutual Fund	1.31%
Emerging Markets Growth Fund Inc	1.11%
WF Asian Reconnaissance Fund	1.06%
Capital Group	1.02%
FIL Investment (Mauritius) Ltd.	0.98%

Founders committed to growing the company

Total number of issued and paid up shares of Rs 10 each are 120.91 million (post 1:1 bonus in Sept, 2010, 1:1 bonus in Jun, 2012 and dilution (QIP) in Sept, 2014)

# Naukri

All Jobs

IIT/IIM Jobs

Govt. Jobs

International Jobs

Skills, Designations, Companies

Location

Experience ▾

Salary ▾

**Search**

Advanced Search

**Register with us**

-OR-

**Upload your CV**

Max 300kb, doc, docx, rtf, pdf

We will create your profile

Browse Jobs

All Jobs

Jobs by Company

Jobs by Category

Jobs by Location

Jobs by Designation

Jobs by Skill



Get best matched jobs on your email. No registration needed

**Create a Job Alert**

Top Employers



Best Places to Work

All Sectors

Information Technology

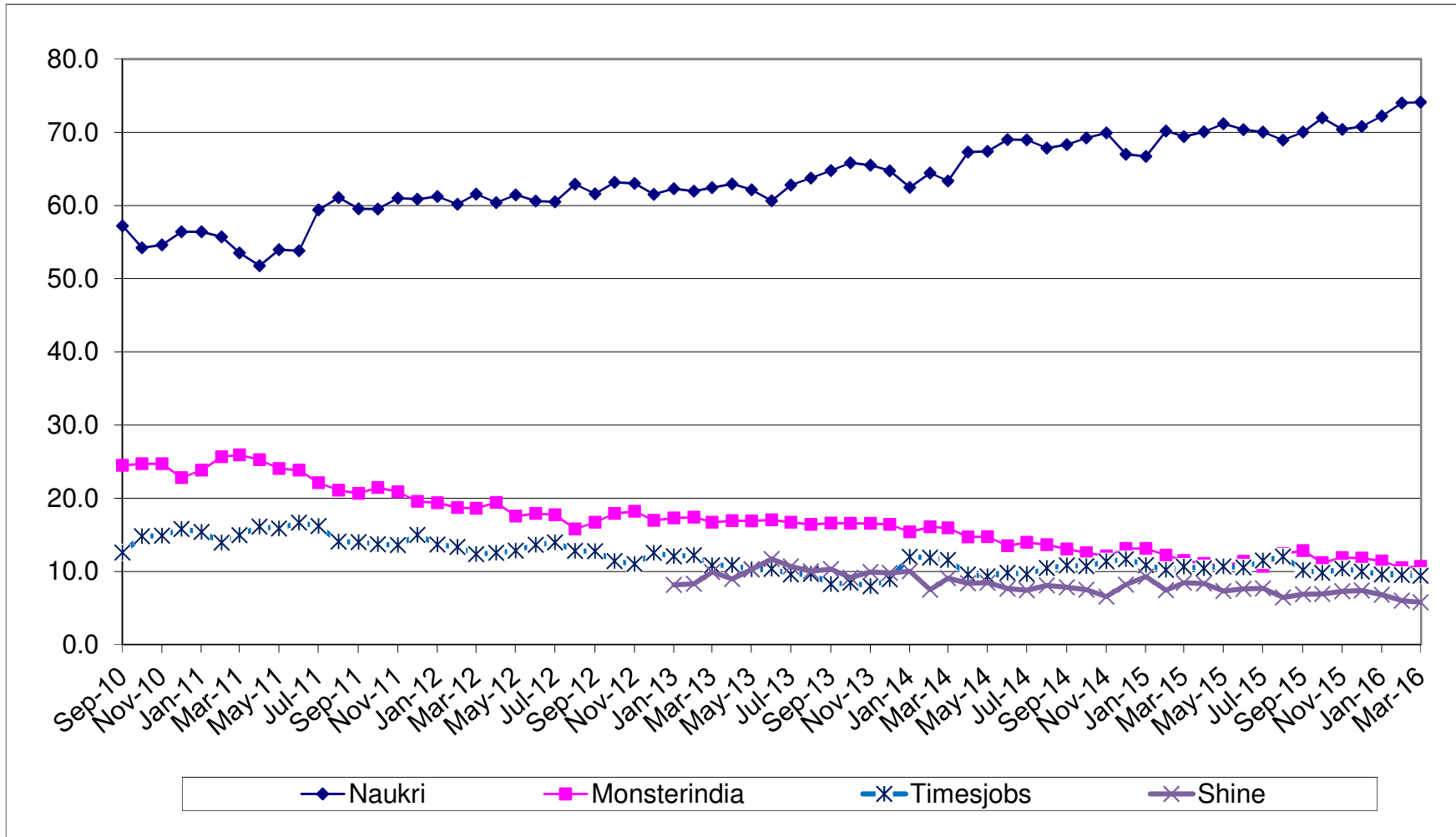
Manufacturing

Services

# Naukri is the dominant leader in the online job market

- During or end of, Q4 FY 15-16
  - ~72% traffic share (Source : comScore)
  - 260,000 to 340,000 jobs on a day
  - ~46 million resumes
  - 12,700+ avg. resumes added daily
  - 195,000+ resumes modified daily
  - 650,000 to 850,000 resume searches daily
  - 7.5 to 10.2 million resume contacts by recruiters daily
  - Over 29,900 job seekers availed premium services
- 36,300 clients in Q4 FY 15-16 vs 32,800 in Q4 FY 14-15
- 61,000 clients in FY 15-16 vs 57,000 in FY 14-15

# Dominant traffic share

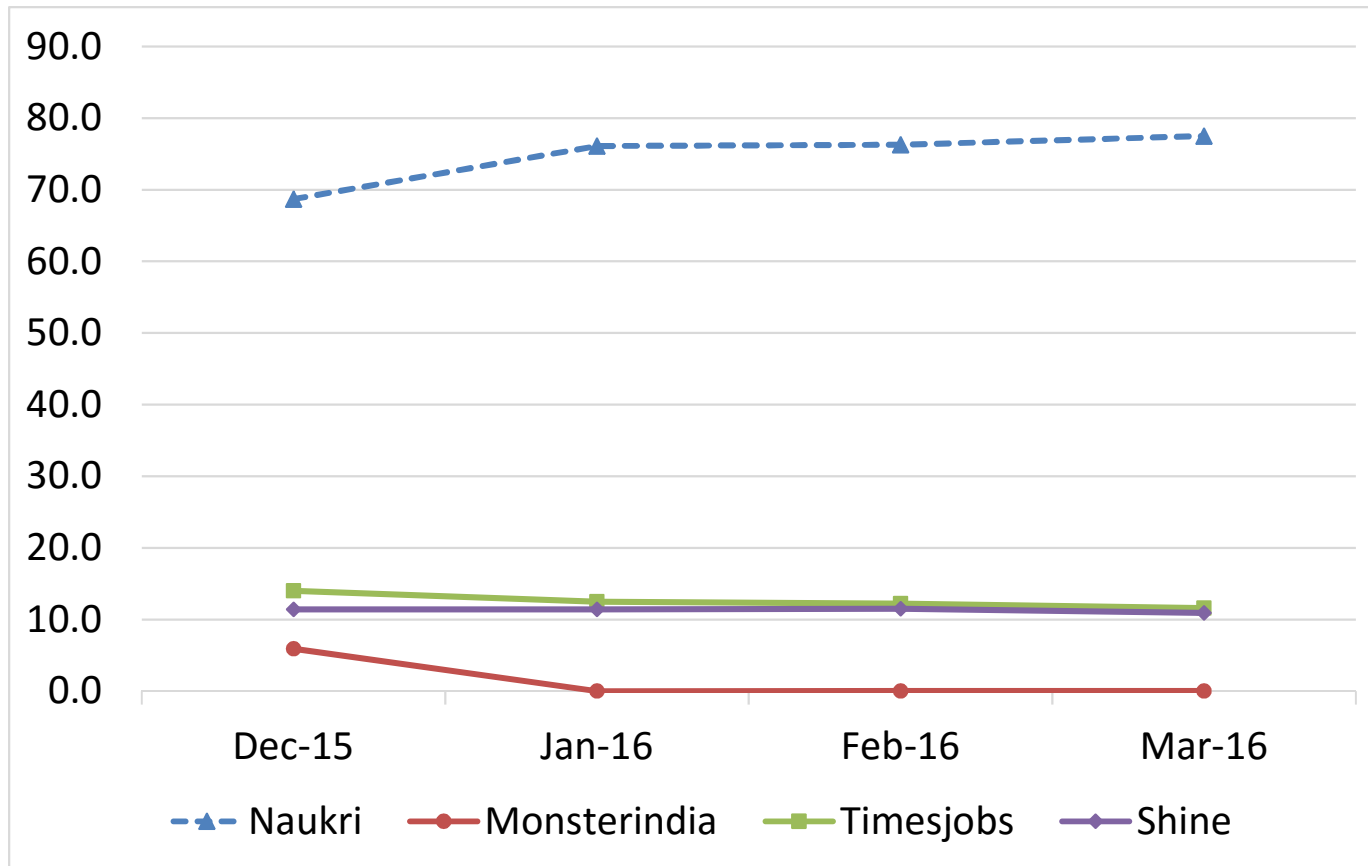


Source: comScore (excludes traffic from mobile and tablets)

Above chart excludes LinkedIn since traffic may not pertain to jobs

~56% of the total sessions for Naukri, in Q4 FY 15-16, through mobile, Source : Google Analytics

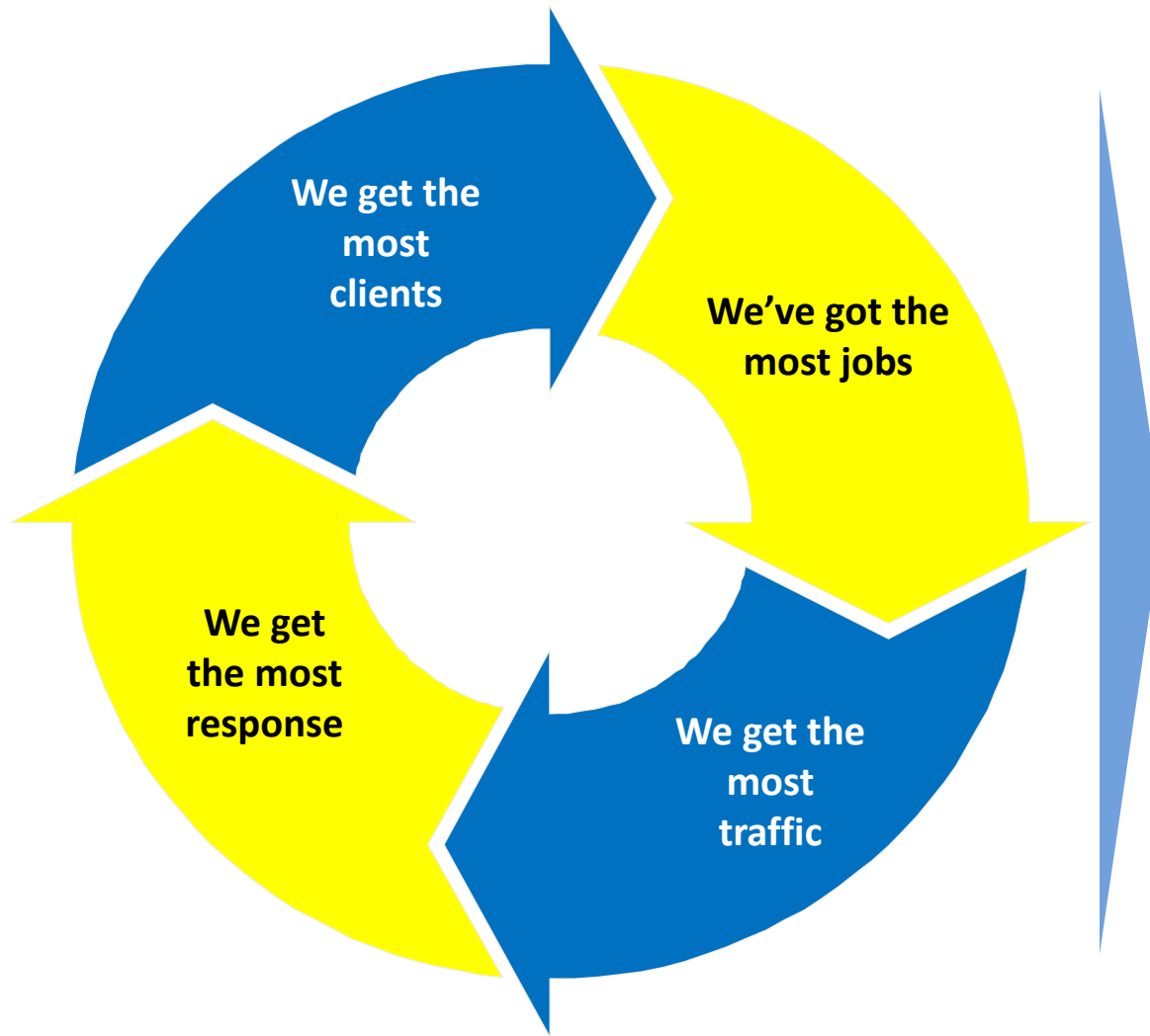
# Traffic share based on traffic from mobile phones



Source : comScore



# Naukri is a business of the virtuous circle



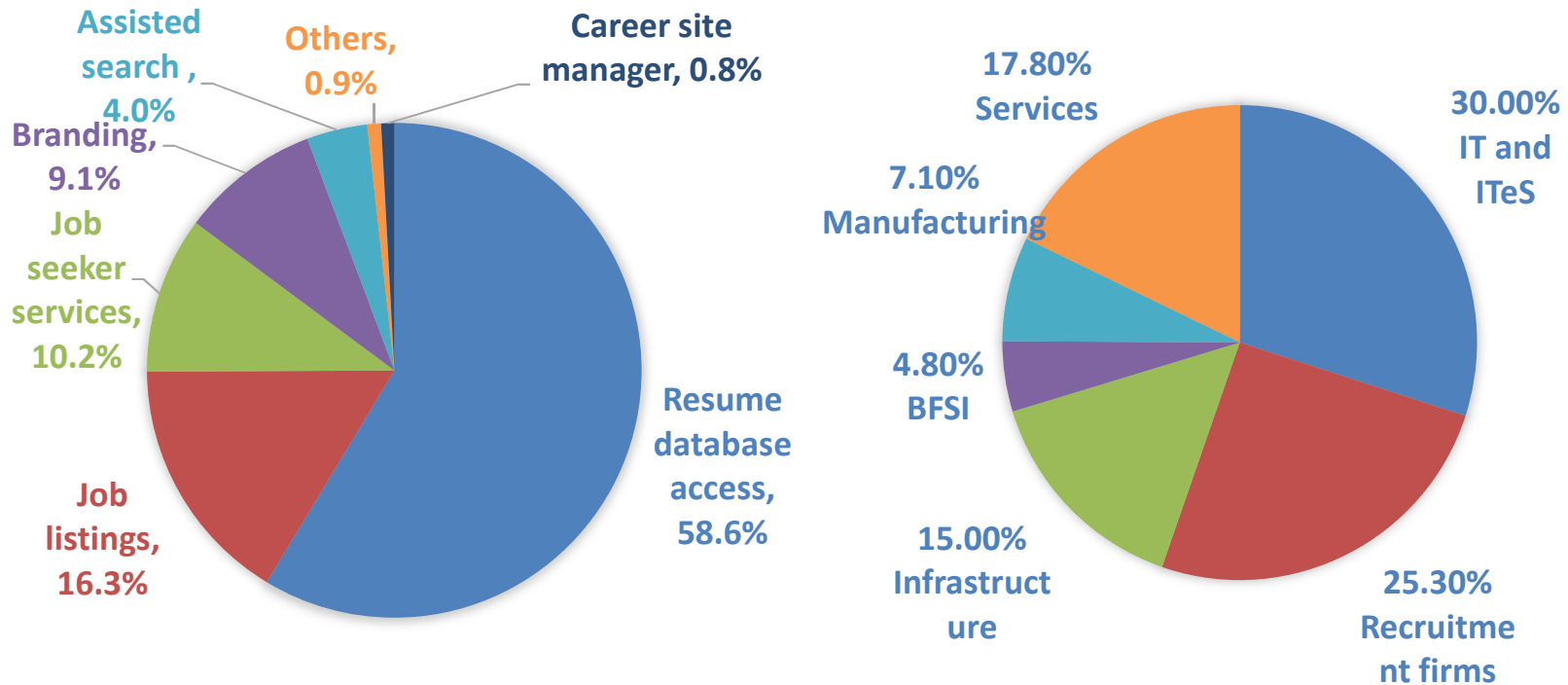
## Benefits

- 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 in FY 15-16

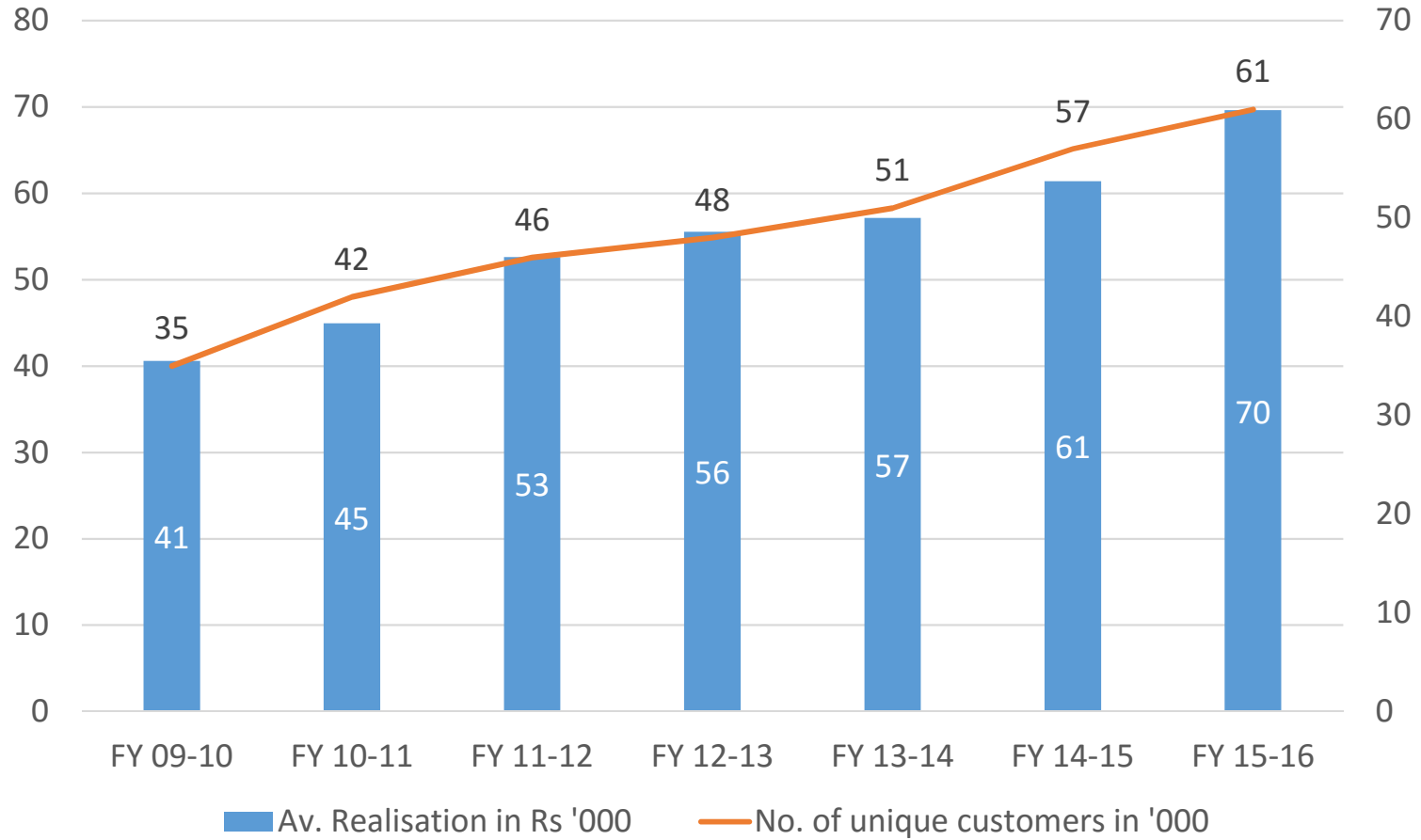
- B2B revenues about 90% (from Recruiters)
  - Resume database access
  - Job listing (response management)
  - Employer branding (visibility)
  - Career site manager
  - Others - Resume short listing and screening, campus recruitment
  - Non recruitment advertising (other than for jobs)
- B2C about 10%
  - Job seeker services

# Breakup of revenue by product type and industry in FY 15-16



Assuming 50% of the revenue from Recruitment firms is from IT industry, then IT and ITeS is about 42%  
 BFSI is banking, financial services and insurance

# Revenue per client



# Strategy

## Newer products for recruiters

- Career site manager, response management tools and applicant tracking system
- Employee referral tool
- Recruiter profile

## Mobile

- App for Android, iOS
- HTML5 site

## Superior search

- Semantic search
- Job seeker and recruiter experience better and faster
- Use of analytics to improve matching

## Customer service

- Responsive customer service
- Solution based approach

# Products and features being focused on

## Career site and Response management

- Powers career site for recruiters and corporates
- Helps manage responses from various sources

## Recruiter profile

- A Recruiter can create a personal profile on Naukri website
- Job seekers can choose to follow him/ her

## Referral hiring

- Power employee referral portal for corporates
- Employees can submit direct or social media referrals and track their status

## Semantic search

- Better search results for job seekers and recruiters
- Improved and optimized based on searches by recruiters

# Career site manager (CSM)

Powers a recruiters end-to-end recruitment process



## Career Link on website

+ Mobile ready career site

## Social Recruiting

+ Search Engine Optimization

## Application Tracking System

+ Searchable CV database

Sold to over 1600 recruiters (including corporates) in FY 15-16

Additional capabilities & features added and variants being launched

# Few clients of CSM





# Mobile an important source of traffic

About 56% of the sessions in Q4 FY 15-16 (vs 55% sessions in Q3 FY 15-16) from mobile

**Android app**

22% of total Naukri sessions

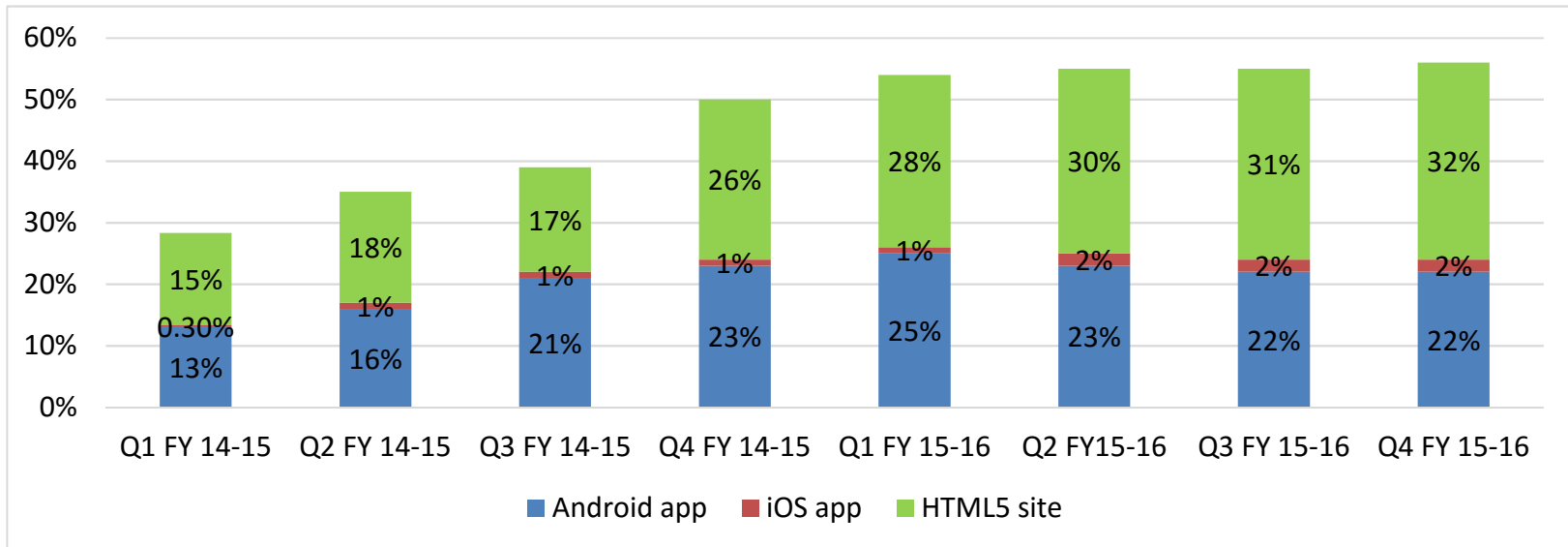
**iOS app**

2% of total Naukri sessions

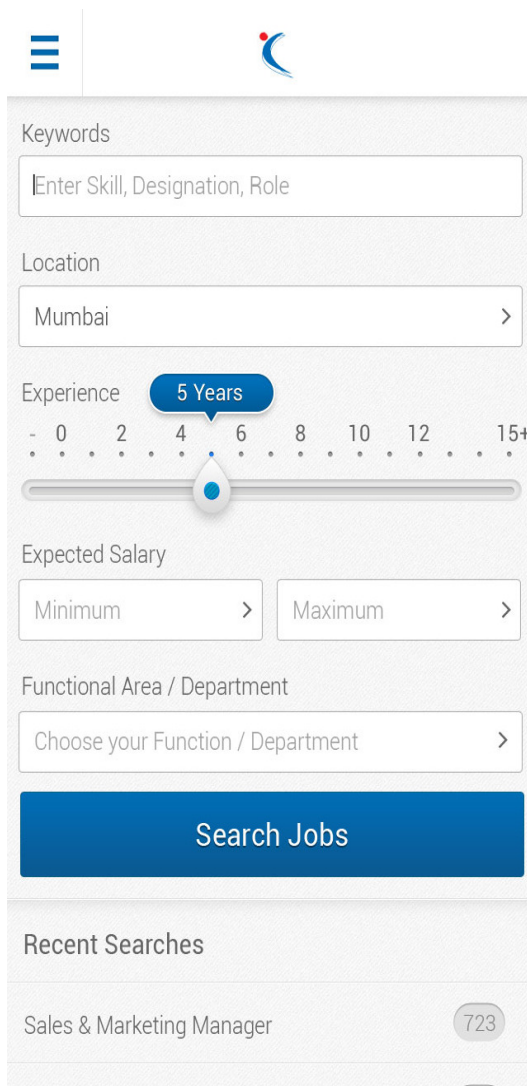
**HTML5 site**

32% of total Naukri sessions

Trend over eight quarters



# The App and HTML5 site



Keywords  
Enter Skill, Designation, Role

Location  
Mumbai

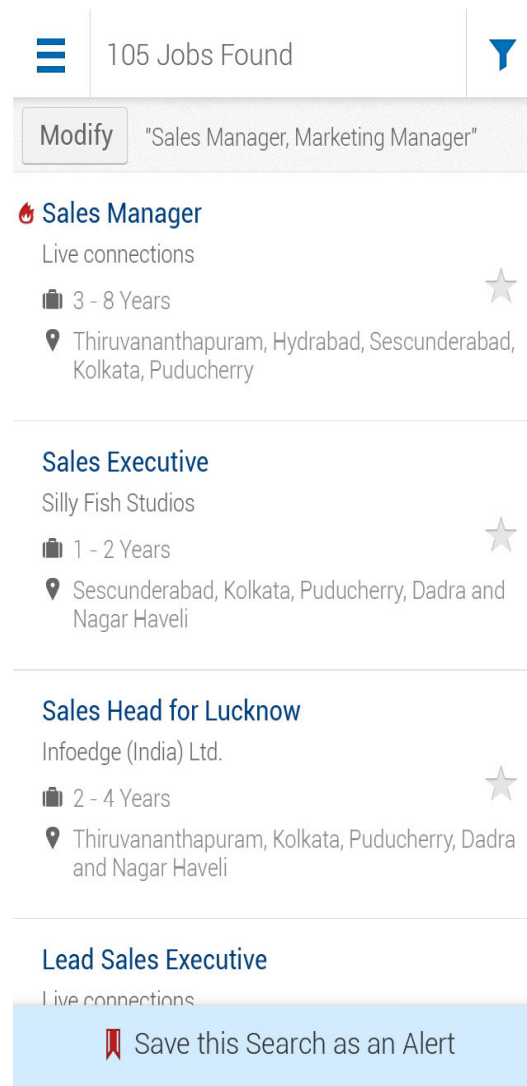
Experience  
5 Years  
- 0 2 4 6 8 10 12 15+

Expected Salary  
Minimum Maximum

Functional Area / Department  
Choose your Function / Department

**Search Jobs**

Recent Searches  
Sales & Marketing Manager (723)



105 Jobs Found

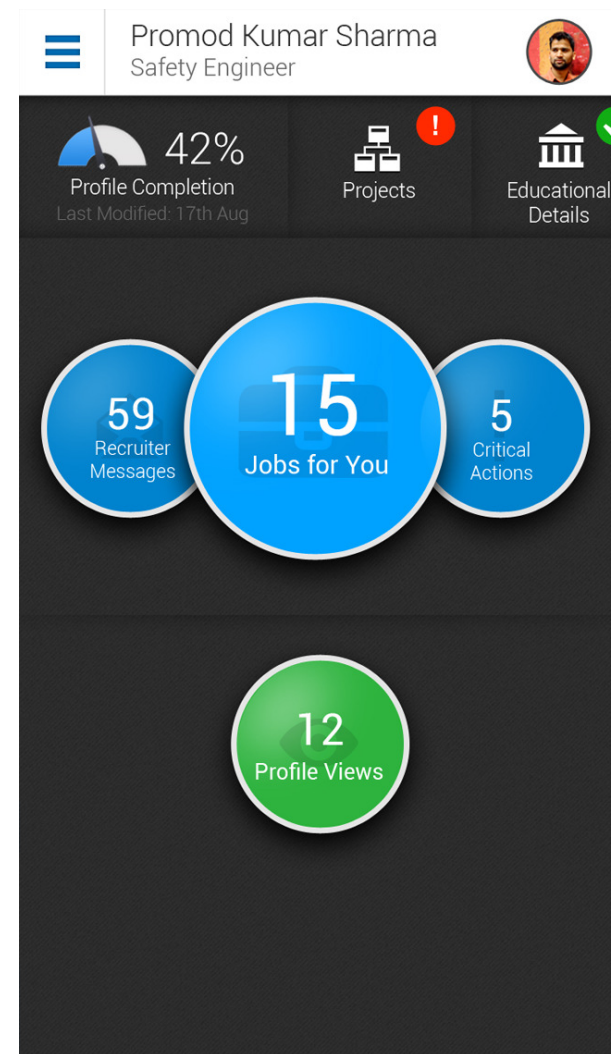
Modify "Sales Manager, Marketing Manager"

**Sales Manager**  
Live connections  
3 - 8 Years  
Thiruvananthapuram, Hyderabad, Secunderabad, Kolkata, Puducherry

**Sales Executive**  
Silly Fish Studios  
1 - 2 Years  
Secunderabad, Kolkata, Puducherry, Dadra and Nagar Haveli

**Sales Head for Lucknow**  
Infoedge (India) Ltd.  
2 - 4 Years  
Thiruvananthapuram, Kolkata, Puducherry, Dadra and Nagar Haveli

**Lead Sales Executive**  
Live connections  
**Save this Search as an Alert**



Promod Kumar Sharma  
Safety Engineer

Profile Completion 42%  
Last Modified: 17th Aug

Projects

Educational Details

59 Recruiter Messages

15 Jobs for You

5 Critical Actions

12 Profile Views

# Competition

- Local job boards
  - Monsterindia.com
  - Timesjobs.com
  - Shine.com
- LinkedIn
  - Solves a different problem
- Continuous innovation and improvements in product and service is the key to counter competition

# Some international job sites

Name of the website	Revenue	No. of profiles/ resumes in mn	No. of unique clients	Approx. Market Cap **
51job.com* (China)	USD 317 mn	90	406,000	USD 1.61 bn
Seek.com^ (Australia)	AUD 277 mn	6.1	-	AUD 5.70 bn
Recruit# (Japan)	@JPY 15.88 (in bn)	-	-	JPY 1.97 tn
Info Edge# (Recruitment)	INR 5312 mn	46	61,000	INR 91.09 bn (for the company)

\* Annual report/ presentation for year ended December 31, 2015

^ Domestic revenue from Australia as per annual report / presentation for year ended June 30, 2015

# financial nos./ corporate presentation for year ended March 31, 2016

@ of which about 22.6% from HR media

\*\* As of May 10, 2016, 1 USD = 1.36 AUD = 109.07 JPY = INR 66.68

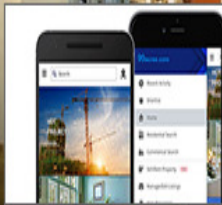
99 acres

Buy Rent Projects Commercial Dealers

All Residential ▾ Type Location or Project/Society or Keyword

SEARCH

MAP SEARCH



List your property just in few steps on 99acres mobile app



★★★★★

★★★★★



REAL ESTATE CATEGORY

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

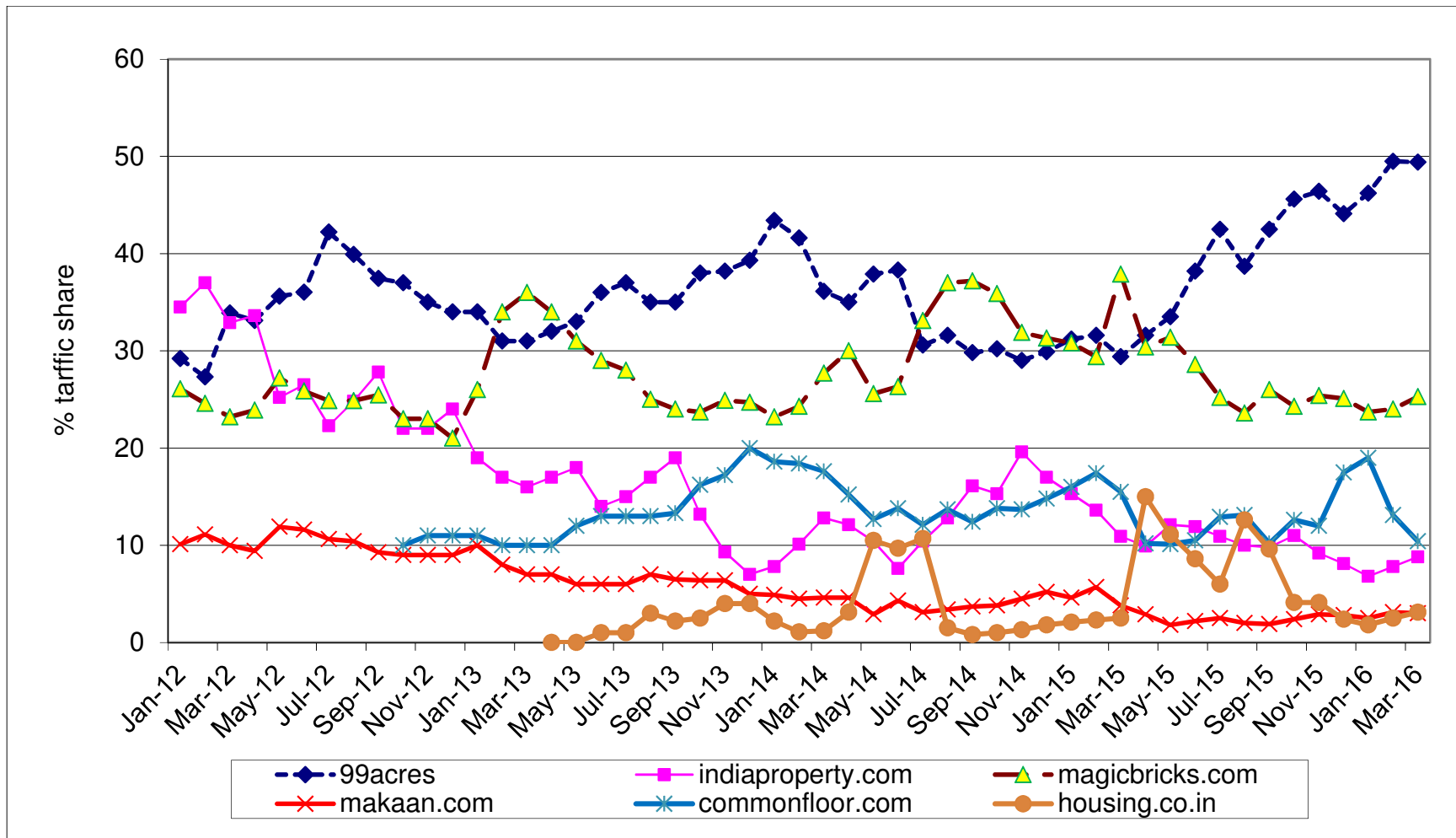
Get the App

Explore Real Estate in India

# Online real estate business - India

- Real estate estimated to be the largest advertising category in print
- Our estimate of spend on online real estate portals was INR 3.2 to 3.3 bn in FY 15-16
- 99acres, a leader amongst 6 players
  - Google and local classifieds sites (like olx and quikr) also compete for this market
- Access through mobile increasing

# Traffic share – Evolving in to a two horse race

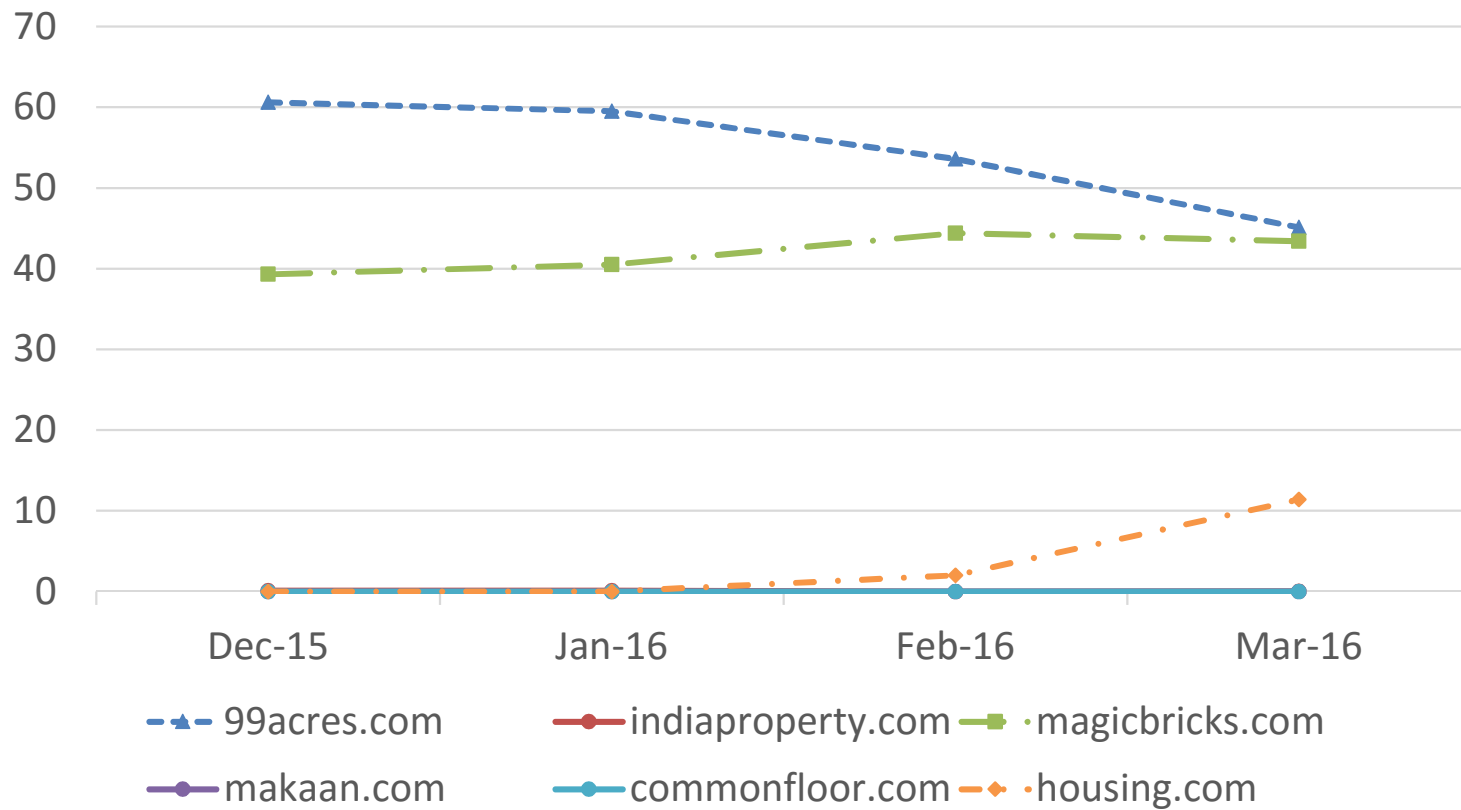


Source : comScore.com (excludes traffic from mobile and tablets)

~51% of the total sessions for 99acres, in Q3 FY15-16, through mobile. Source : Google Analytics



# Traffic share based on traffic from mobile phones



# 99acres business model



## Revenue Model

- Listing and Branding/ Visibility advertisements
  - Paid by agents and developers
  - Currently free to individuals
- Others:- Microsites, home page links, Google Ad sense, advertising other than for real estate, buyer database access, international listings

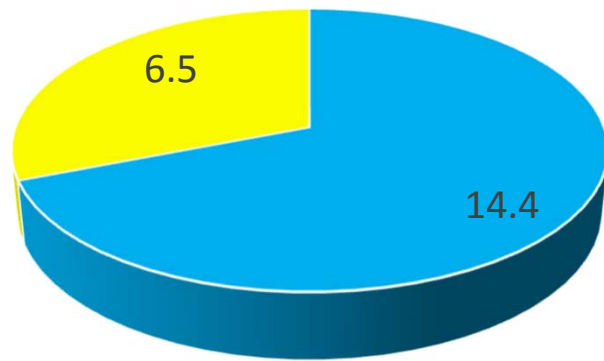
# Some approx. numbers for 99 acres

- Total projects 1,34,200 (under construction or ready to move in, as of March 11, 2016)
- Total listings 7.74 lac of which owner listings were 2.61 lac (as of May 11, 2016)
  - Residential 6.53 lac
  - Commercial 1.21 lac

Since Jan 4, 2016 projects listings have reverted to being live for 2 months (vs 4 months) resulting in drop in total no. of listings vs January, 2016

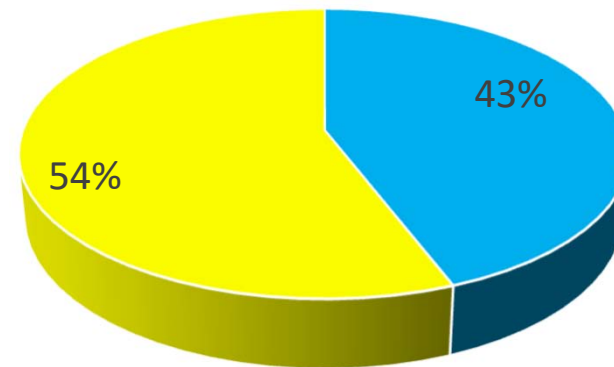
# In FY 15-16

No. of customers in '000



■ BROKER ■ BUILDER

Revenue breakup by customer type



■ BROKER ■ BUILDER

# 99acres's strategy



# Products/ features being focused on

## Quality of information

- Photos, videos, spam detection and reduction

## New projects platform

- Improved user experience on site and app
- New offerings for builders
- Comparison with similar projects, payment plans, construction status updates

## Mobile app

- For android and iOS
- Personalisation

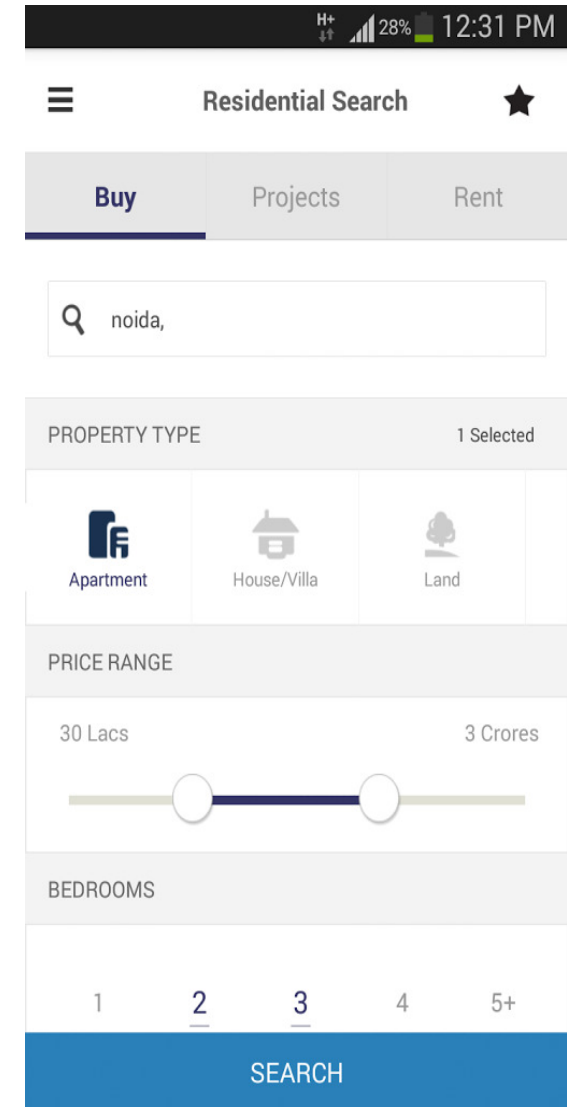
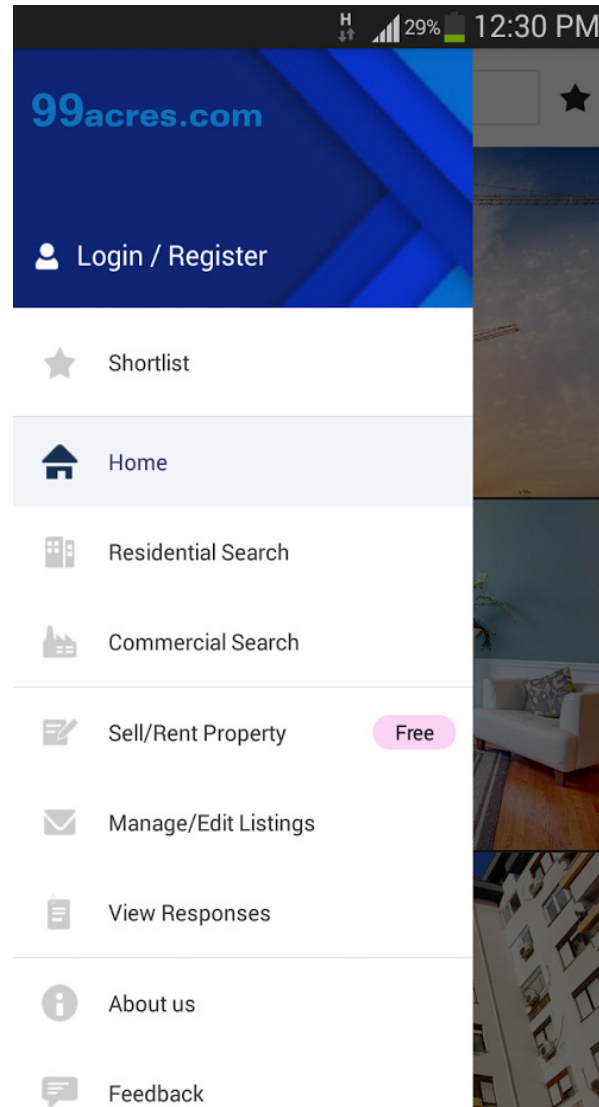
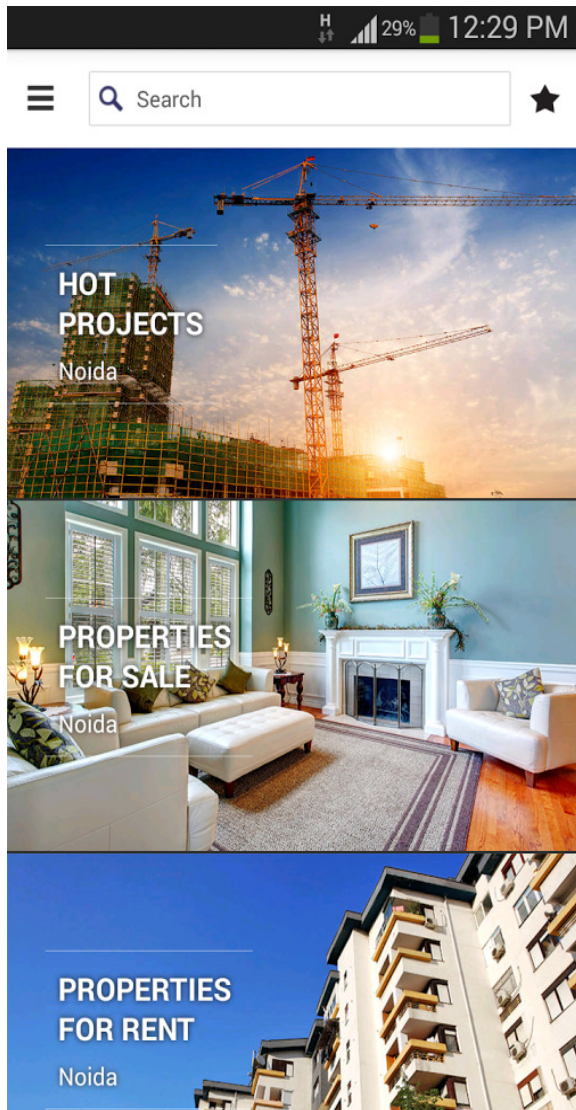
## Verified listings

- Verification of listings to improve quality of data

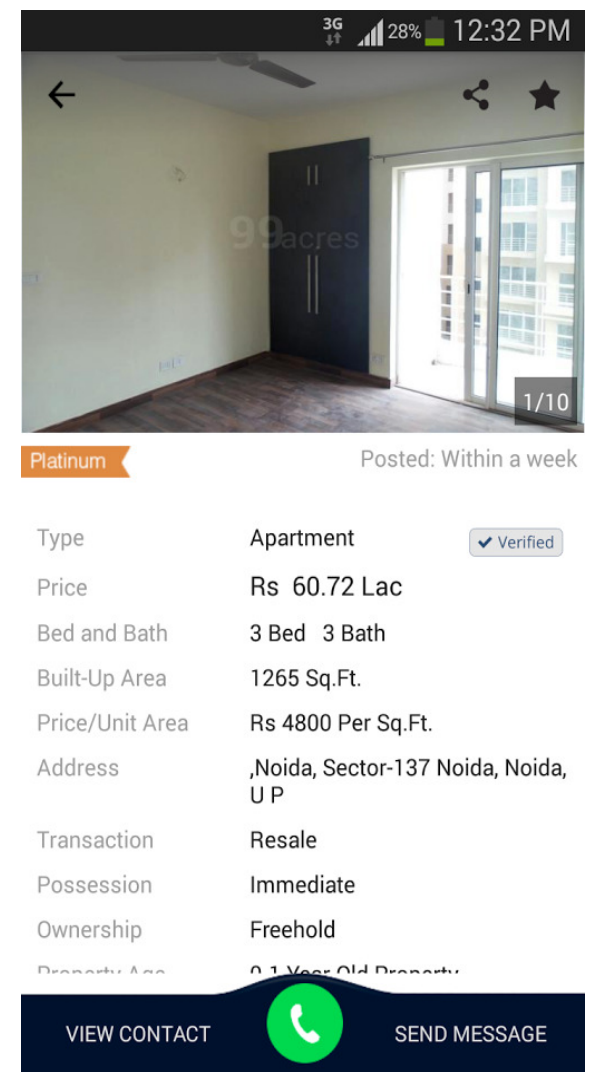
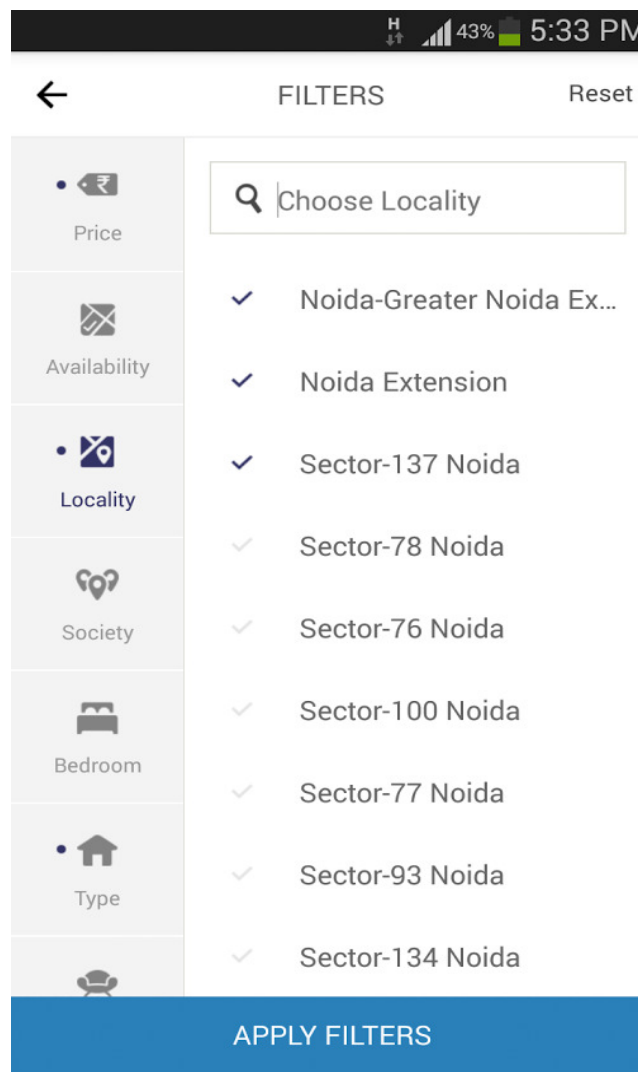
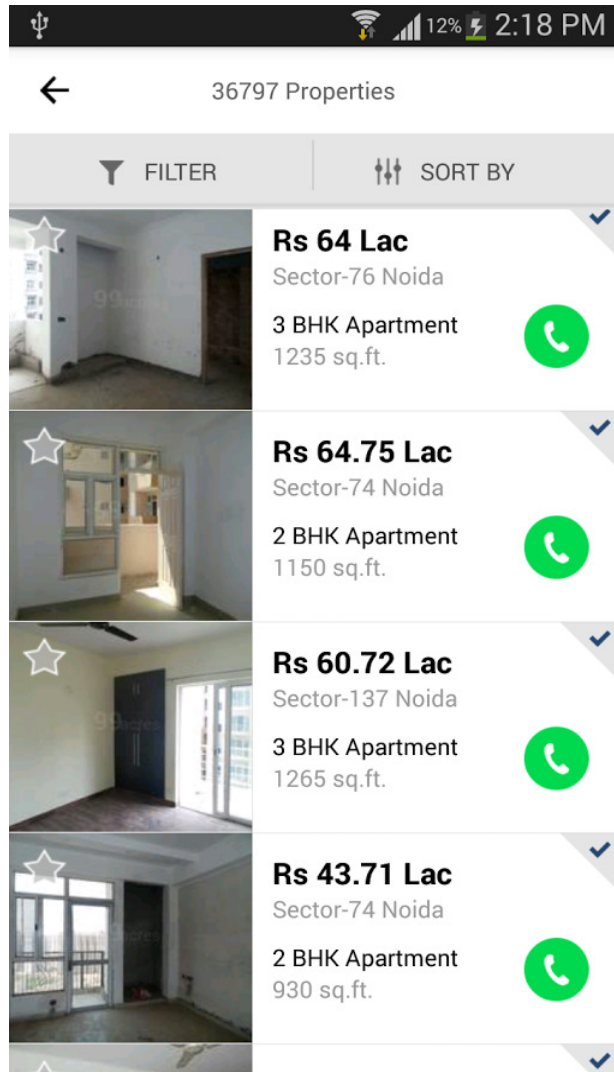
## Lead management system

- Lead optimization and monetisation

# Mobile app – home screen, navigation and search page

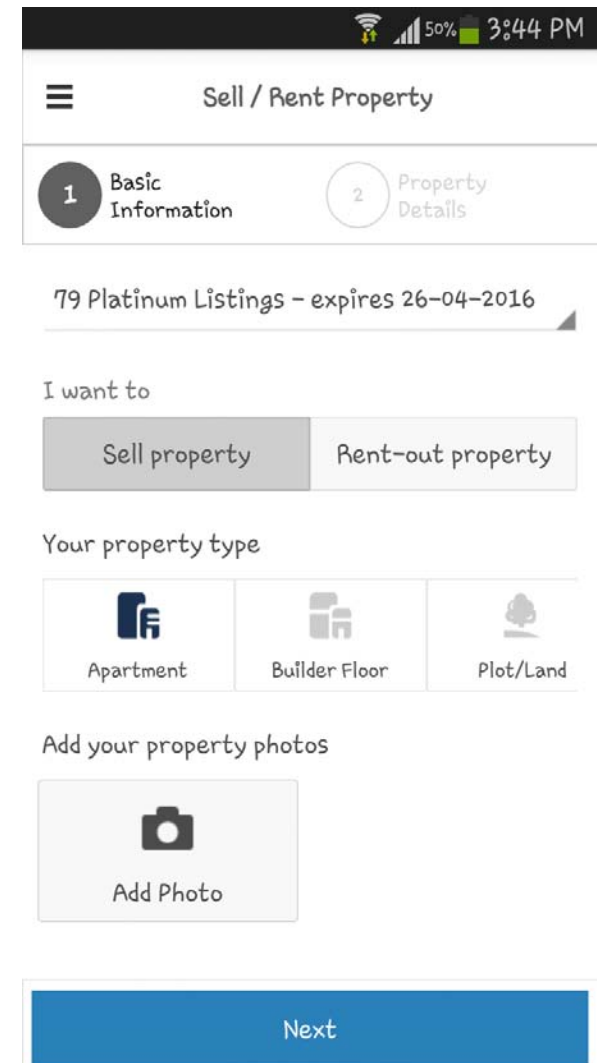
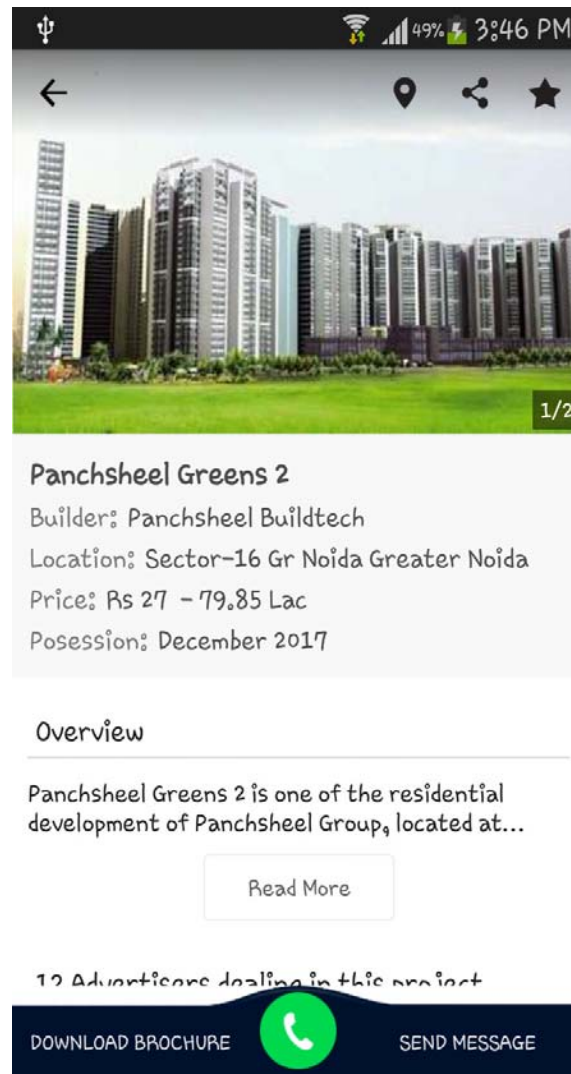
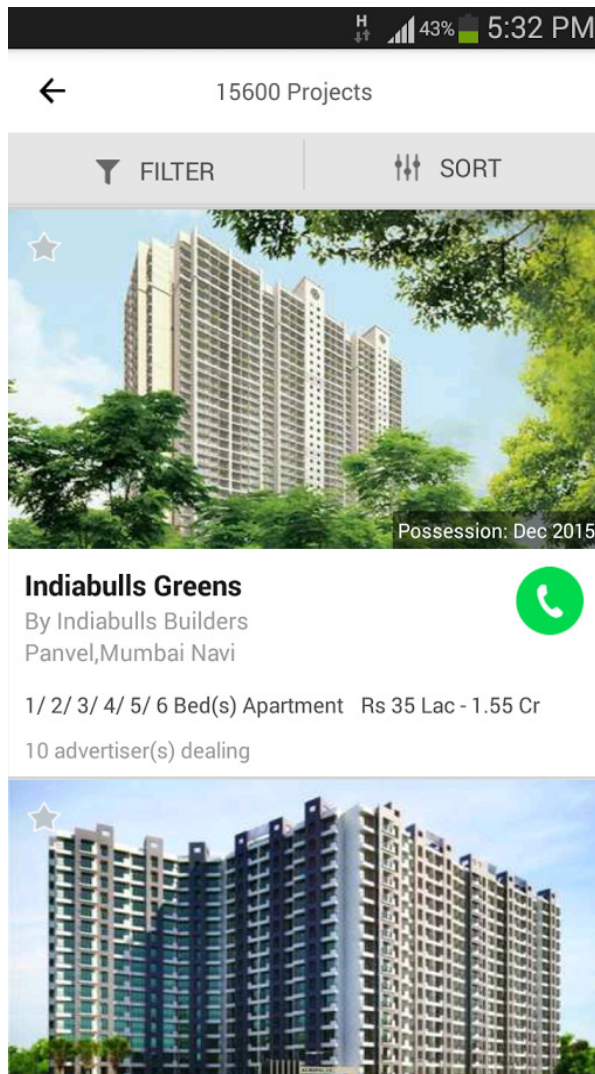


# Mobile app - Property search results page, filter page, property detail page





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



# Mobile an important source of traffic

About 52% of the sessions in Q4 FY 15-16 (vs 51% of the sessions in Q3 FY 15-16) from mobile

**Android app**

21% of total

99acres sessions

**iOS app**

2% of total

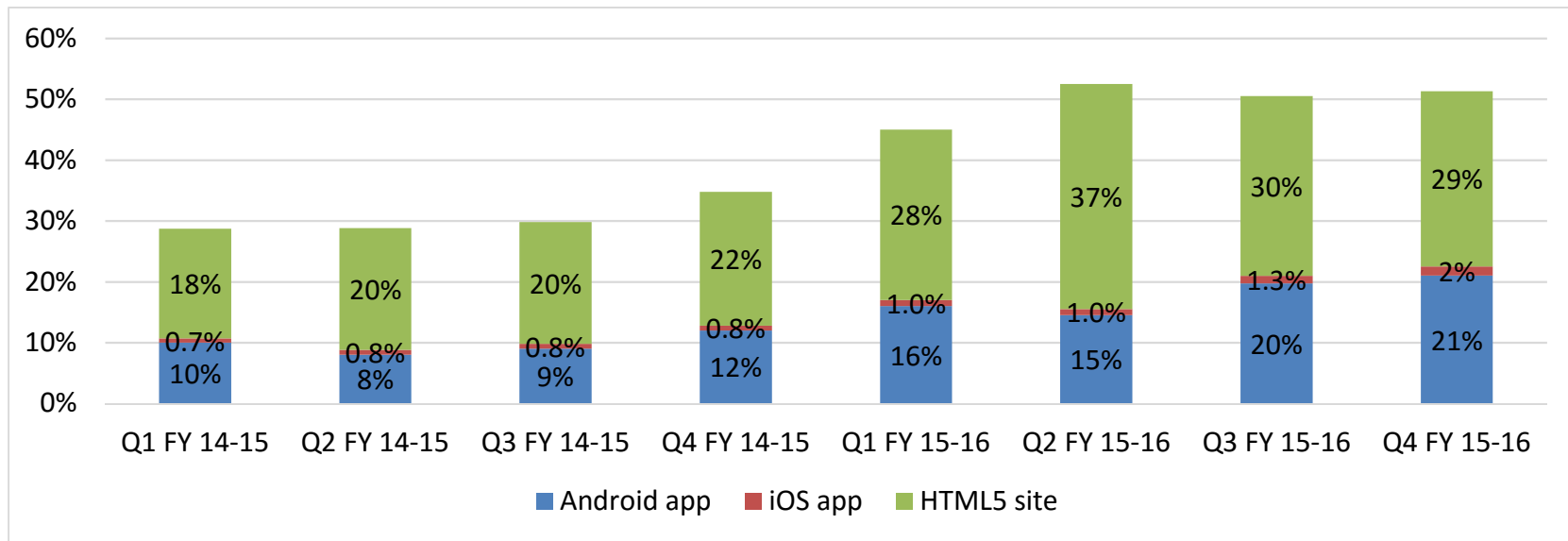
99acres sessions

**HTML5 site**

29% of total

99acres sessions

Trend over seven quarters



# Jeevansathi



[Hindi-Delhi](#) | [Marathi](#) | [Hindi-UP](#) | [Punjabi](#) | [Telugu](#) | [Bengali](#) | [Tamil](#) | [Gujarati](#) | [Kannada](#) | [Hindi-MP](#) | [Bihari](#) | [More](#) ▼

Quick  
Search

Bride ▼

Religion ▼

Mother tongue ▼

Caste ▼

21 Yrs ▼ to 35 Yrs ▼

Marital Status ▼

City/State/Country ▼

With photos only

**Search**

[▶ Search by profile id](#) | [▶ Advanced Search](#)

Success Stories

Millions of Profiles

Safe & Secure

Paid Membership

Find a match on the basis of  
**Community Religion Caste Profession**

MBA's Marathi Baniya Punjabi Patil  
Gujarati Jain Sikh Brahmin Tamil  
Bhumihar Gupta Konkani Kshatriya  
Khatri Rajput Sindhi Vaishnav Defence  
Agarwal Kayastha Muslim Hindi-UP  
NRI's Haryanvi Professionals Jat  
Yadav Hindi-Delhi Manglik Christian  
Bengali Muslim Doctors Malayalee  
Software Parsi Arora Nair Bihari  
Teachers Divorcee Telegu Buddhist



Existing User - Login

Email ID

Password

Remember Me

[Forgot Password?](#)

[New User? Register Now!](#)



**1 Register**

Create your profile and start



**2 Search**

Find exactly the kind of people you are



**3 Contact**

Email them or View Phone Numbers to

New User?

**Register FREE**

# Online matrimonial business - India

- Online market estimated to be INR 5.5 to 6 bn in FY 15-16
- Three main players – Bharat matrimony, Shaadi and Jeevansathi
- Used by
  - Those disconnected from mother communities
  - Youngsters wanting choice
- In many instances process is driven by family
- Fragmented market
  - Basis geography
  - Communities (religion, caste, sub castes)

# Jeevansathi business model

- **Website**
  - Free to list
  - Free to search
  - Free to express interest
  - Free to accept others expression of interest
  - Pay to get contact details
- **Offline centres** (10 centres operational)
  - Walk in sales for matching services
- **Franchise** - walk in centres

# Jeevansathi imperatives

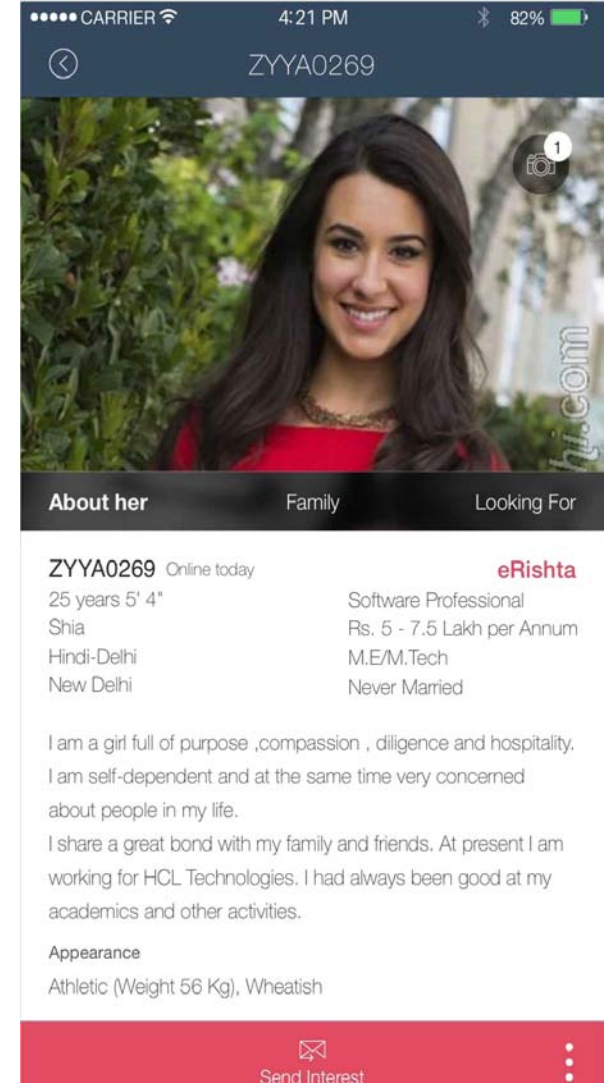
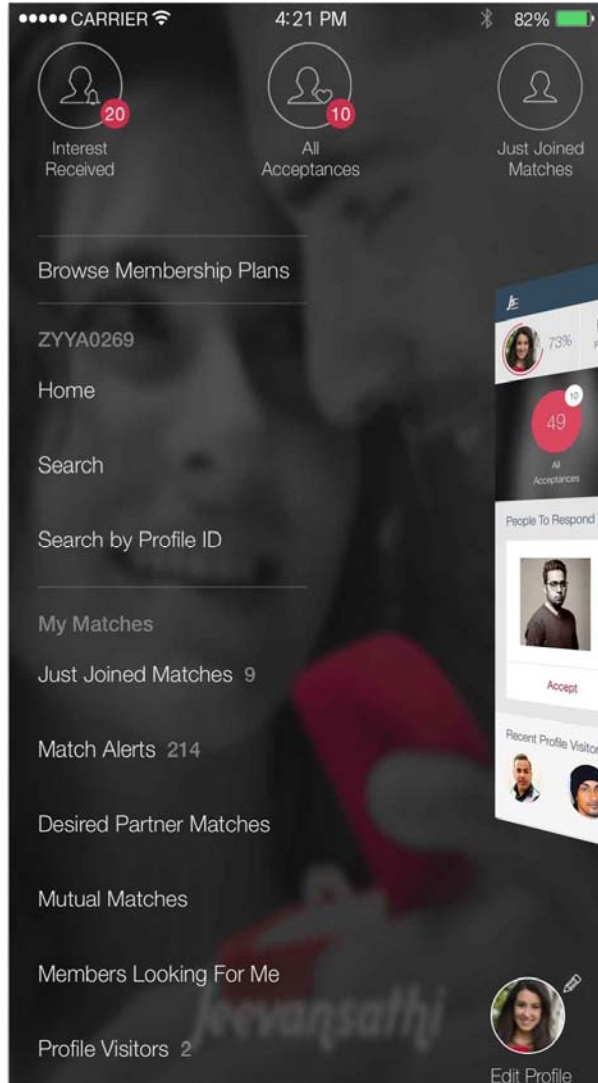
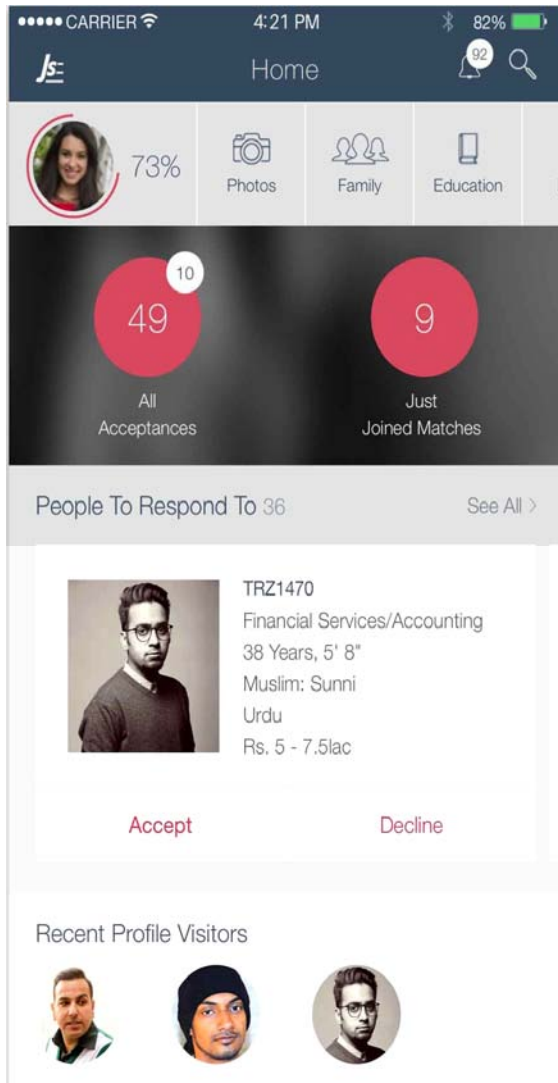
- Improve free to paid conversion rate
- Improve revenue growth rates
- Increase profile acquisitions
- Focus on key identified communities
- Leverage mobile

# Competition

- Three main players
  - Bharatmatrimony is the leader
  - Shaadi is no. 2
  - Jeevansathi no. 3
- Bharatmatrimony 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 India communities and states
- However, there are overlaps amongst sites



# Mobile app



# Mobile an important source of traffic

About 79% sessions in Q4 FY 15-16 (vs 74% sessions in Q3 FY 15-16) from mobile

## Android app

45% of total  
Jeevansathi sessions

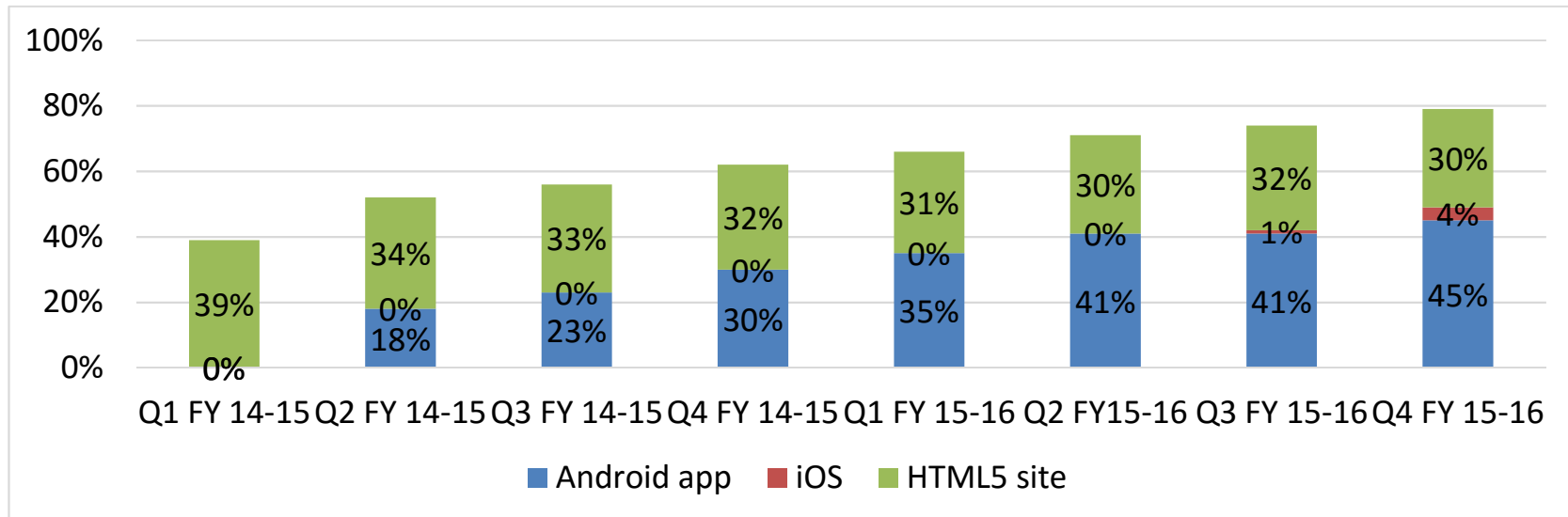
## iOS app (launched on Nov 13, 2015)

4% of total  
Jeevansathi sessions

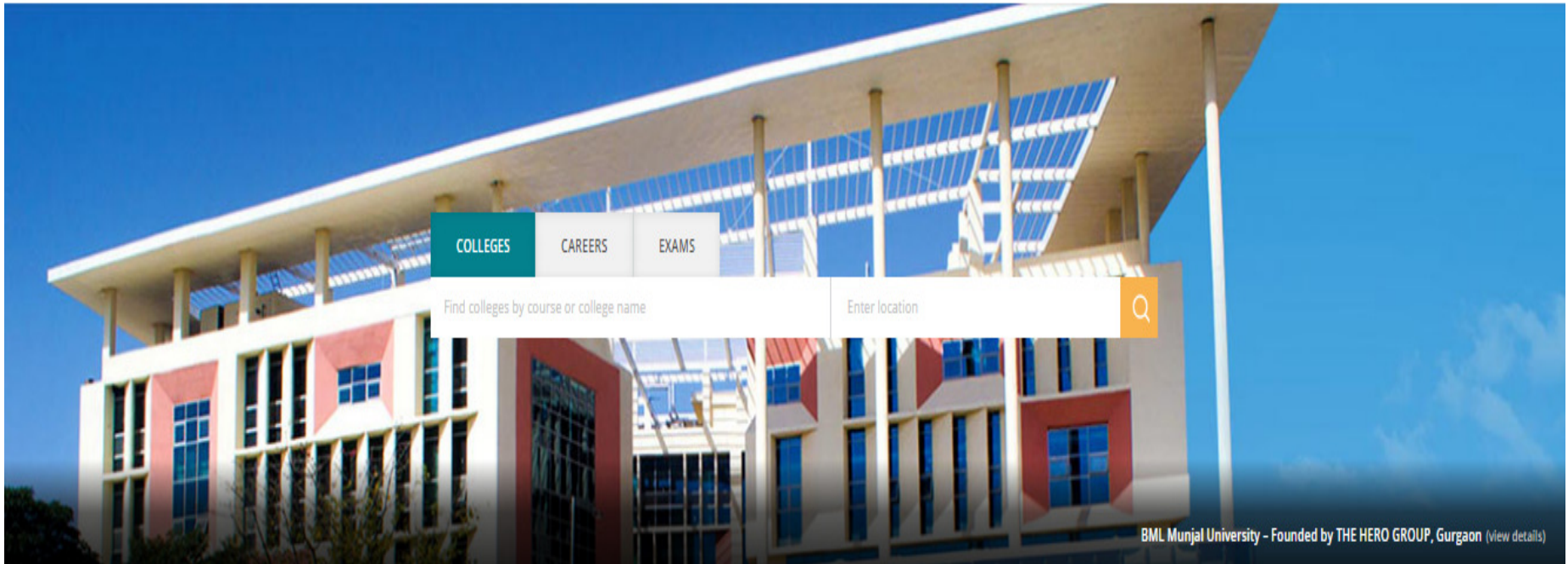
## HTML5 site

30% of total  
Jeevansathi sessions

Trend over eight quarters



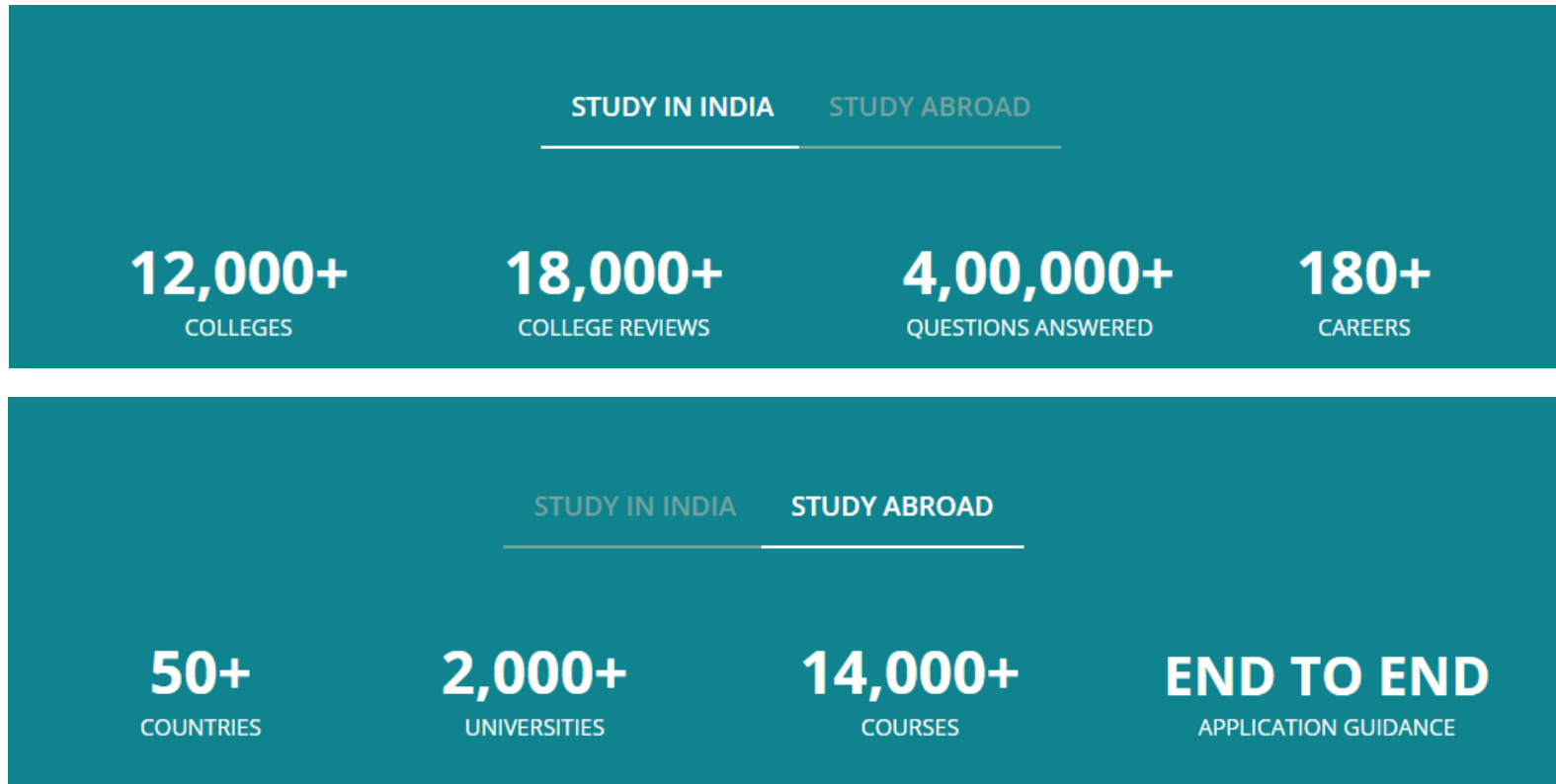
# Shiksha



Featured	<b>Alliance University</b> Bengaluru Admissions open 2016	<b>Kalasalingam University</b> Tamil Nadu KAREEEE 2016 - Apply Now	<b>Integral University</b> Lucknow   Shahjahanpur B.Tech/Arch/MBBS/Law - Apply	<b>SRM University</b> Sonepat, Haryana Admissions Open 2016	<b>Vel Tech Dr.RR &amp; Dr.SR Technical university</b> Chennai VTUEEE2016 Apply Now
----------	---	--	--	---	--

Empowering millions of students in making the right  
career and college decision

# Shiksha – some approx. nos.



As of end March, 2016

# Educational classifieds business - India

- Education as a category spends amongst the highest in print
  - ~ INR 3.8 bn (Source TAM Adex) in FY 14-15
  - 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

**MBA** ENGINEERING DESIGN LAW OTHERS

3,00,000+ applicants every year and 2,500+ colleges. Stressed?  
Make informed decisions at each step to get to the right MBA college.



## MBA EXAMS

50 + MBA exams. Do you know enough about them?

Know important dates, preparation tips, syllabus and more



## COLLEGE REVIEWS

Nobody knows a college better than its alumni and students.



## MBA RANKINGS

Curious to know the top MBA colleges?



## IIM CALL PREDICTOR

IIMs consider a lot more than just the CAT score



## FIND MBA COLLEGES

Want to find the right MBA college for you?



## ASK CURRENT MBA STUDENT

Have college specific questions?



## ALUMNI SALARY DATA

Wondering about your career journey post-MBA?



## 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)



# Shiksha strategy

Build differentiated & useful content

- Improved information on colleges & courses for different streams
- User generated content (Q&A with community/experts/campus reps, college reviews) & interactive student tools

Strong mobile experience

- Full feature mobile sites for domestic & study abroad
- Full version App (Android) with personalized experience

New User growth

- Updated course architecture
- For courses beyond B Tech, MBA & Study Abroad

Key Account development

- Innovative branding & student engagement solutions
- Applications for International clients
- Deeper key account management by sales team

# Campus Representatives from Colleges for credible advice

The screenshot shows the Shiksha website's navigation bar with categories: MBA, ENGINEERING, DESIGN, OTHER COURSES, STUDY ABROAD, and COUNSELLING. A search icon is present on the right, along with 'Log in | Register' links. The breadcrumb trail reads 'Home > MBA > Resources > Campus Connect'. The main heading is 'Campus Connect - Ask Current Students before making a college decision'. Below this is a banner image of five smiling students. The banner contains 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'. A search bar at the bottom of the banner prompts 'Search by college name to ask or view questions'.

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

# Authentic College Reviews

## College Reviews

Sort: **Year of Graduation** | Recently Submitted | Highest Rating | Lowest Rating

Average Alumni Rating: **3.2/5**

✓ **Itish Singh** Class of 2019 | Rating: **2.8/5** | Doesn't Recommend This Course

The college location seizes all the goods it have. If the academics are considered they're quite well and disciplinary but when it comes to the administration it's not up to the mark. As a student who comes from a good school having scored a 95 percent in boards I personally feel that my caliber is degraded by being here. Just because the placements are astonishing here doesn't compensate for the frustrating and depressing life here. Having this [Read More...](#)

Is this review helpful? **YES**

Share on

Worth the Money	
Crowd & Campus Life	
Salary & Placements	
Campus Facilities	
Faculty	

✓ **Kshitij Kumar** Class of 2019 | Rating: **2.8/5** | Doesn't Recommend This Course

College is 'okay'. Keep that in mind before getting in here

Worth the Money	
-----------------	--

# Q&A mobile app for expert advice

Shiksha Ask & Answer  
India's largest education community

**ASK**  
any question related to careers and education

**JOIN**  
discussions on career choices, exam prep, college selection & more

**FOLLOW EXPERTS**  
to never miss reliable guidance from people who matter

**FOLLOW TAGS**  
to see latest questions and discussions basis your interest

**ASK questions**

**JOIN discussions**

**FOLLOW tags & experts**

**SEARCH information & people**

**JAGADISH BHATIA**  
Contributor - level 14 | 1947 points  
10 years of experience in teaching LAW  
Professor at National Law University  
LL.B., LL.M from Symbiotic Law College

**ELECTRICAL ENGINEERING**  
132 FOLLOWERS

**Engineering**  
Which is a better college between Manipal and VIT for Engineering?  
3 Answers - 24 Followers - 988 Views

# Home page for Overseas Education



**shiksha**  
STUDY ABROAD

Signup Login

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

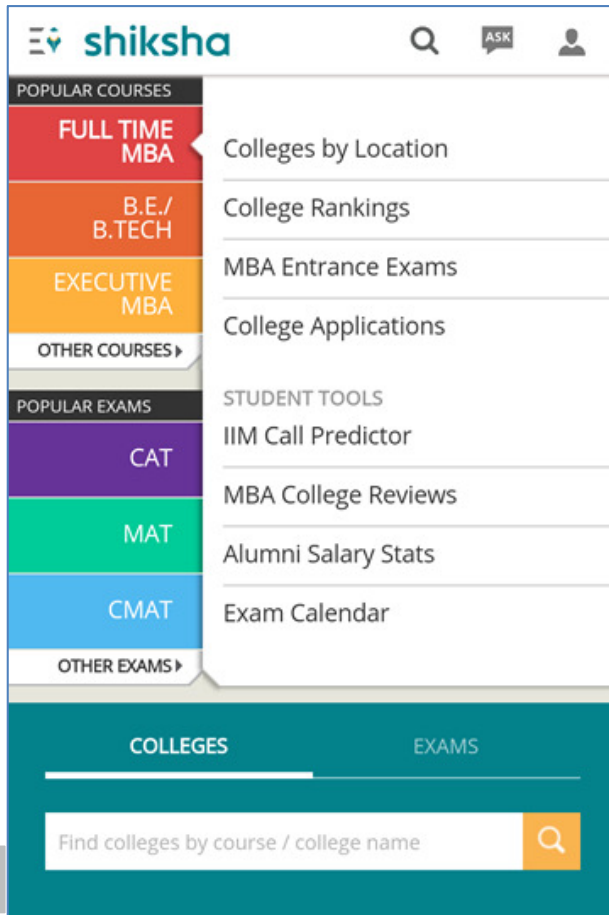
Continue

### Most viewed Courses

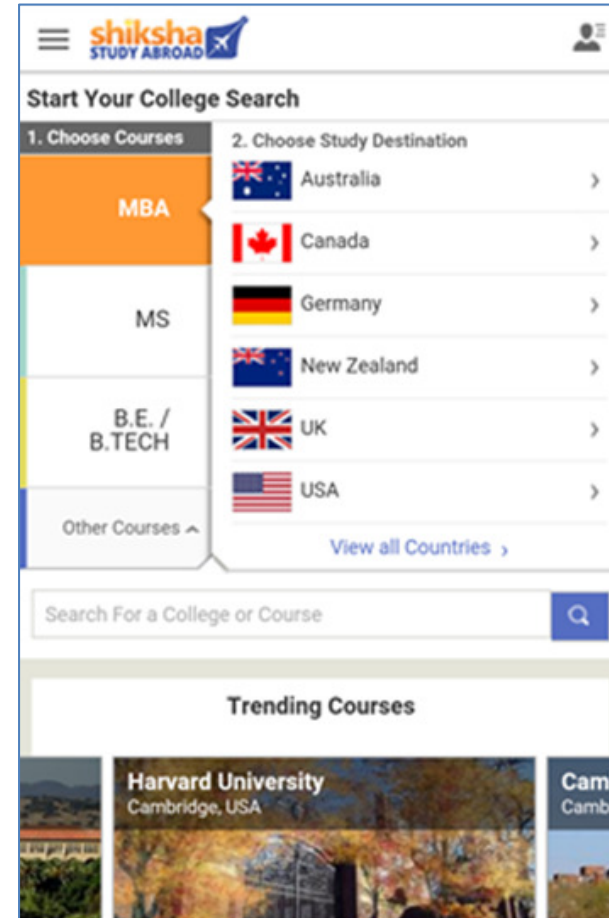
In USA	In Canada	In Australia	In UK
Harvard University Cambridge, USA	Memorial Universi ... St. John's, Canada	Kaplan Business S ... Adelaide, Australia	King's College Lo ... London, UK



# Mobile sites



India



Study Abroad

# Competition – different for India and abroad

## Domestic

- Print
- Online
  - Google
  - Pagalguy
  - Careers360
  - HTcampus
  - Minglebox
  - MBA Universe
  - CollegeDekho
  - CollegeSearch
  - CollegeDunia

## Studyabroad

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

# Investee companies



# Portfolio status

As of May 15, 2016

Rs in million

Investee Company	Website	Total amount invested	% Holding on fully diluted basis *	% of Total
<b>Active</b>				
Zomato Media Pvt Ltd.	<a href="http://www.zomato.com">www.zomato.com</a>	4,838	46%	60%
Applect Learning Systems Pvt Ltd.	<a href="http://www.meritnation.com">www.meritnation.com</a>	968	59%	12%
Etechaces Marketing and Consulting Pvt Ltd.	<a href="http://www.policybazaar.com">www.policybazaar.com</a>	325	^10%	4%
Kinobeo Software Pvt Ltd.	<a href="http://www.mydala.com">www.mydala.com</a>	270	42%	3%
Canvera Digital Technologies Pvt Ltd.	<a href="http://www.canvera.com">www.canvera.com</a>	901	49%	11%
Happily Unmarried Marketing Pvt Ltd.	<a href="http://www.happilyunmarried.com">www.happilyunmarried.com</a>	163	44%	2%
Mint Bird Technologies Pvt. Ltd.	<a href="http://www.vacationlabs.com">www.vacationlabs.com</a>	60	26%	1%
Green Leaves Consumer Services Pvt. Ltd.	<a href="http://www.bigstylist.com">www.bigstylist.com</a>	64	25%	1%
Rare Media Company Pvt Ltd.	<a href="http://www.bluedolph.in">www.bluedolph.in</a>	74	35%	1%
<b>Sub Total</b>		<b>7,663</b>		<b>96%</b>
<b>Written off/ provisioned for/ exited</b>				
Studyplaces, Inc.	<a href="http://www.studyplaces.com">www.studyplaces.com</a>	45	13%	1%
Ninety Nine Labels Pvt Ltd.	<a href="http://www.99labels.com">www.99labels.com</a>	285	47%	4%
Nogle Technologies Pvt Ltd.	<a href="http://www.floost.com">www.floost.com</a>	26	31%	0%
<b>Sub Total</b>		<b>356</b>		<b>4%</b>
<b>Total</b>		<b>8,019</b>		<b>100%</b>

\* 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.

^ being Info Edge's proportionate share of economic interest. Info Edge's 50.01% subsidiary, Makesense holds nearly 20% of Policybazaar in association with Temasek. Temasek had infused a total of Rs 1.34 bn for its 49.99% stake in Oct, 2015

# Investee companies financials

INR million

INFO EDGE (INDIA) LIMITED													
Investee Company Financials													
As of March 31, 2016													
Rs in million													
Investee Company	Website	Total amount invested	Approx. diluted and converted shareholding %	Operating revenue					Operating EBITDA				
				FY11-12	FY 12-13	FY 13-14	FY 14-15	FY 15-16	FY11-12	FY 12-13	FY 13-14	FY 14-15	FY 15-16
<b>Partly owned subsidiary</b>													
Zomato Media Pvt Ltd.	<a href="http://www.zomato.com">www.zomato.com</a>	4838	46%	20.4	113.8	306.0	967.3	1849.7	(72.2)	(100.3)	(413.9)	(1360.0)	(4409.6)
Applct Learning Systems Pvt Ltd.	<a href="http://www.meritnation.com">www.meritnation.com</a>	968	59%	40.7	98.2	202.8	215.9	287.1	(54.4)	(214.3)	(285.3)	(227.2)	(414.2)
<b>Associate</b>													
Etechaces Marketing and Consulting Pvt Ltd.	<a href="http://www.policybazaar.com">www.policybazaar.com</a>	325	^10%										
Kinobeo Software Pvt Ltd.	<a href="http://www.mydala.com">www.mydala.com</a>	270	42%										
Canvera Digital Technologies Pvt Ltd.	<a href="http://www.canvera.com">www.canvera.com</a>	901	49%										
Happily Unmarried Marketing Pvt Ltd.	<a href="http://www.happilyunmarried.com">www.happilyunmarried.com</a>	163	44%	537.0	868.0	1398.6	2117.5	2708.6	(287.6)	(490.0)	(461.5)	(745.2)	(1647.8)
Mint Bird Technologies Pvt. Ltd.	<a href="http://www.vacationlabs.com">www.vacationlabs.com</a>	60	26%										
Green Leaves Consumer Services Pvt. Ltd.	<a href="http://www.bigstylist.com">www.bigstylist.com</a>	64	25%										
Rare Media Company Pvt Ltd.	<a href="http://www.bluedolph.in">www.bluedolph.in</a>	74	35%										
<b>Total</b>		<b>7663</b>		<b>598.1</b>	<b>1080.0</b>	<b>1907.4</b>	<b>3300.7</b>	<b>4845.4</b>	<b>(414.2)</b>	<b>(804.6)</b>	<b>(1160.7)</b>	<b>(2332.4)</b>	<b>(6471.6)</b>

\* 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.  
 ^ being Info Edge's proportionate share of economic interest. Info Edge's 50.01% subsidiary, Makesense holds nearly 20% of Policybazaar in association with Temasek. Temasek had infused a total of Rs 1.34 bn for its 49.99% stake in Oct, 2015

# Zomato

The screenshot shows the Zomato website interface for Delhi NCR. At the top left is the Zomato logo. To the right, there are links for "Order Food Online!", "Log in with Facebook", and "Log in". The main heading reads "Find the best restaurants, cafés and bars in Delhi NCR". Below this is a search bar with "Delhi NCR" selected in a dropdown menu and a search input field containing the text "Search for restaurant, cuisine or a dish". A red "SEARCH" button is on the right. Underneath the search bar is a "COLLECTIONS" section with a "SEE ALL" button. This section features eight collection cards: "Trending this Week" (30 PLACES), "Live Cricket Screenings" (47 PLACES), "Book Online on Zomato" (26 PLACES), "New Restaurants You Probably Haven't Tried Yet" (22 PLACES), "Happy Hours" (25 PLACES), "Sheesha Lounges" (33 PLACES), "Custom Bakes" (5 PLACES), and "+ 27 Collections See all >". Below the collections are three sections: "QUICK SEARCHES" with "Delivery" and "Breakfast" options; "CITY FEED - DELHI NCR" showing a restaurant listing for "Kebab Gali" in Malviya Nagar, New Delhi; and "TOP FOODIES IN DELHI NCR" listing "Sunakshi Aggarwal" (332 Reviews, 1054 Followers) and "Subhash Sahnii" (530 Reviews, 2247 Followers).

**zomato** Order Food Online! Log in with Facebook Log in

Find the best restaurants, cafés and bars in Delhi NCR

Delhi NCR  **SEARCH**

**COLLECTIONS** SEE ALL

- Trending this Week (30 PLACES)
- Live Cricket Screenings (47 PLACES)
- Book Online on Zomato (26 PLACES)
- New Restaurants You Probably Haven't Tried Yet (22 PLACES)
- Happy Hours (25 PLACES)
- Sheesha Lounges (33 PLACES)
- Custom Bakes (5 PLACES)
- + 27 Collections See all >

**QUICK SEARCHES**

- Delivery >
- Breakfast >

**CITY FEED - DELHI NCR**

- Kebab Gali**  
Malviya Nagar, New Delhi

**TOP FOODIES IN DELHI NCR**

- Sunakshi Aggarwal**  
332 Reviews, 1054 Followers
- Subhash Sahnii**  
530 Reviews, 2247 Followers

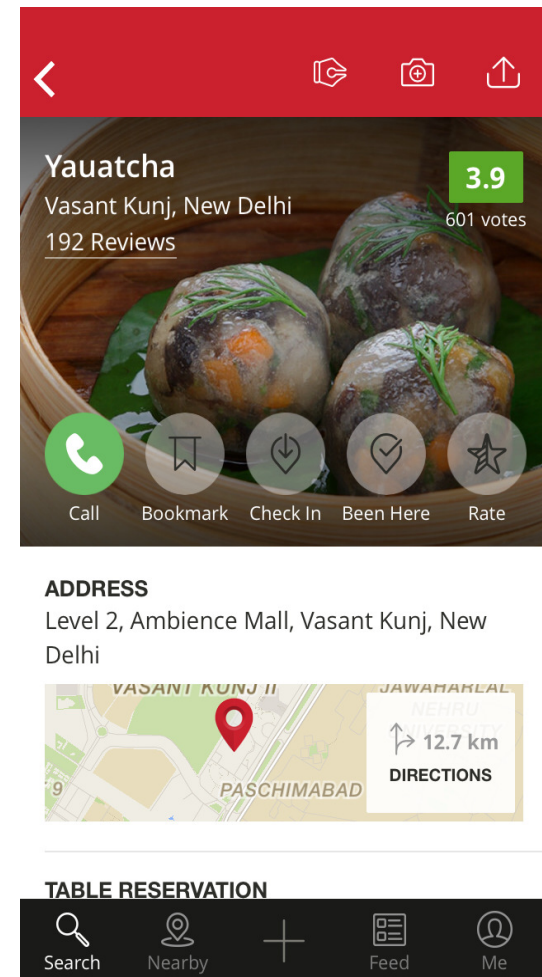
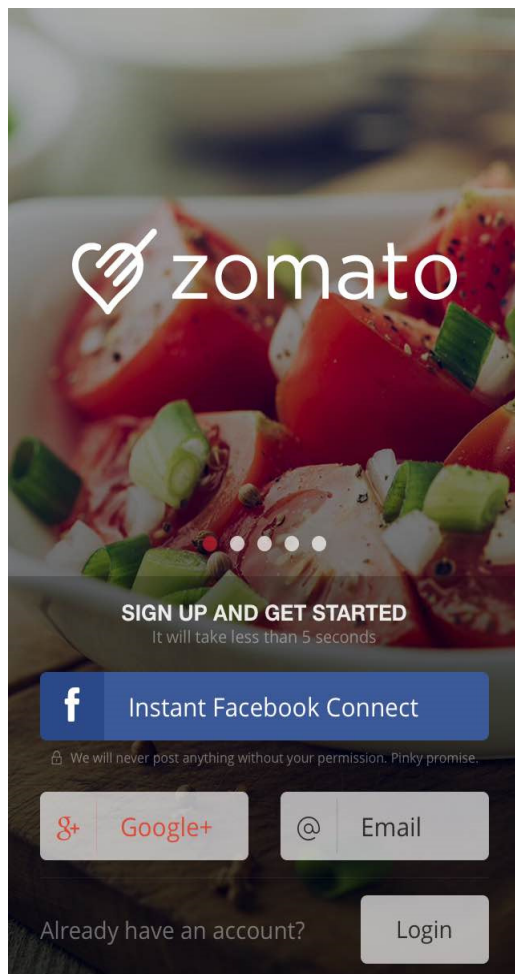
# Zomato – business model

- A clear leader in the restaurant category in India and several other countries
- Presence in 23 countries
  - India, UK, Canada, Czech Republic, Slovakia, Poland, Portugal, UAE, NZ, South Africa, Turkey, Philippines, Indonesia, Italy, Brazil, Ireland, Qatar, Sri Lanka, Chile, Australia, US, Lebanon and Malaysia
  - ~71 million sessions in March, 2016 across web and mobile
  - ~70% sessions through mobile (web and app)
  - Database of 1.1 mn restaurants across the world
- Monetisation growing well

# Zomato – business model

- Business model
  - Advertising
    - Banner ads on web and mobile apps relevant to a user's search of restaurants in an area
    - Events, sponsored spots in collections and corporate tie ups
  - Digitise restaurant menus, provide relevant information (including map coordinates, pictures etc)
    - Regular up-dation through feet on street beats
  - Generate ratings and reviews and enable picture uploads from users
  - Provide a wow user experience
    - search capabilities by location, cuisine, dish names
    - convenience through a high quality mobile app
  - Food ordering on the web and mobile app
    - Online food ordering launched in India and UAE (Dubai & Abu Dhabi) in FY 15-16
      - Delivery done by restaurant or by Zomato's logistics partner Grab and Delhivery
      - 2 mn plus orders processed in FY 16
  - Table reservations (Zomato Book) active in 8 cities globally

# Zomato – mobile app





# Policybazaar



Term Life Insurance



Health Insurance



Two Wheeler



Travel Insurance



Car Insurance



Tax Saving



Child Plans



Investment



Retirement Plans



Cancer Protection



Critical Illness



Home Insurance

## Just for You

Everything we do for our customers

### Our Awards



Best Financial Website

2013 & 2014

### RENEW TWO WHEELER INSURANCE



### User Review

We Value Your Opinion



# Policybazaar

- Policybazaar is India's online price comparison site for insurance
  - A clear value add to individuals and Financial Institutions
- A leader in its category
  - estimated 90% share of Insurance comparison & 40% of online Insurance transactions
- A large untapped and growing market
  - A fraction (less than 4%) of the Indian population is insured



# Meritnation



011-40705070

Purchase

Call Me

What are you looking for?



Download our Mobile App

LOGIN

CREATE ACCOUNT

Online Tutorials

Entrance Exams

Class XII

Class XI

Class X

Class IX

Class VIII

Class VII

Class VI

Class V

Class IV

Class III

Class II

Class I

# ONLINE TUITION

Live classes with the best teachers

CLASS 4 - 12

ENTRANCE EXAMS

Name

E-mail

Password

Mobile No.

Board

Class

Area PIN Code

[Student](#)

Parent

Tutor

Teacher

Join now for FREE

1,12,80,347 Happy Students



By clicking ✓ you agree to our [T&C](#)

## Online Tutorials

Live classes with the best teachers in India

## Smart Study

Videos, Animations and Unlimited practice tests

## Homework Help

Get Solutions to all your Doubts Instantly

## FREE NCERT Solutions

Access solutions to all your NCERT textbooks

## 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
- Expanding offline centres
- Test prep product for engineering and medical entrance examinations

# Meritnation contd.

- Over 10 million registered users
- Over 3 million visitors every month
- ~55-60% of sessions through mobile

# Canvera



ARE YOU A PHOTOGRAPHER?

PRODUCTS NEWS BLOG ABOUT CONTACT SIGN IN PAY NOW

Find a Photographer

Get your own Canvera Photobook

Share your Photobook

## FIND A PHOTOGRAPHER

for any occasion, anywhere in India

[GET RECOMMENDATIONS](#)

SEARCH BY LOCATION



[All locations](#)

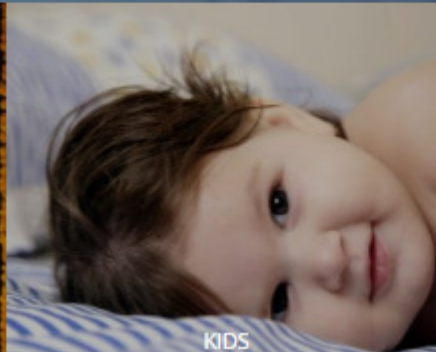
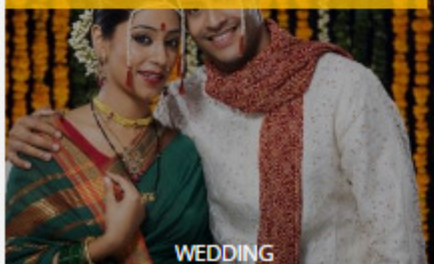
SEARCH BY CATEGORY



[All categories](#)

SEARCH

Popular Categories



Photographers In Focus



# Canvera

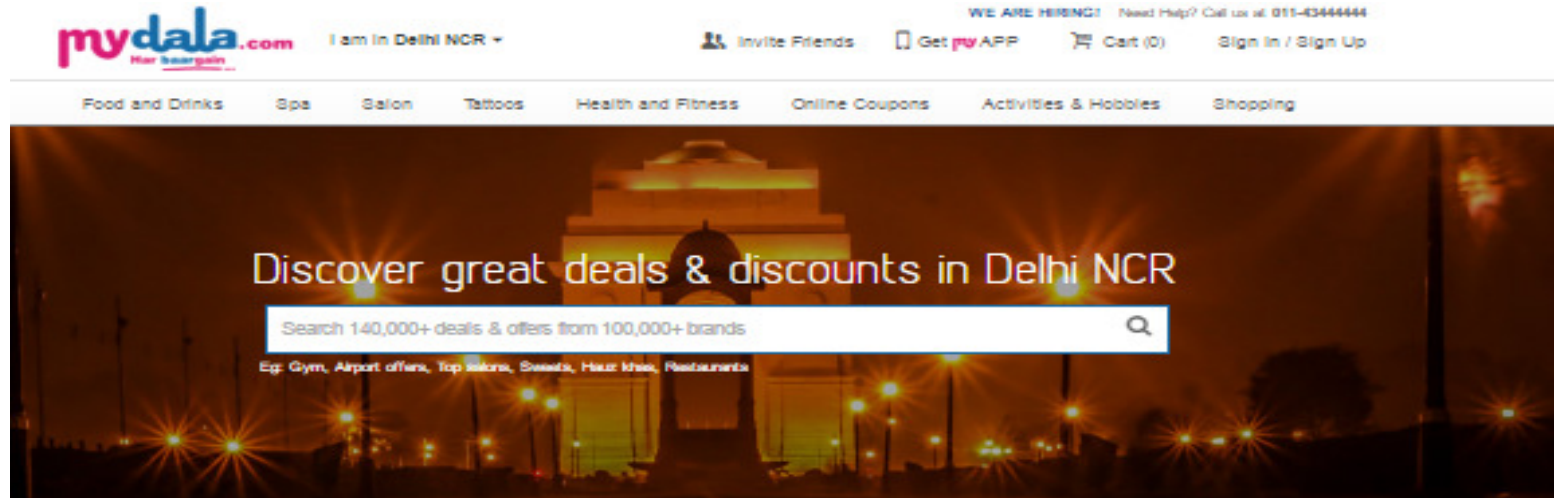
- Focusses on Professional Photographers for their album needs, primarily weddings
- Build brand with the consumer but monetise through the professional photographer
- Products & services include:
  - Printed products (albums) sold to the photographer (main source of revenue)
  - Design of printed products and websites (service business that supports the product business)
  - Web solutions to help professional photographer build their website (SaaS)
- Expertise in digital imaging and printing

# Canvera contd.

- Business model
  - Photographers pay to order printed albums or photographs
  - Additional sources of monetization possible
    - Micro site and ad revenues from photographer classifieds
- Sales presence in 200+ cities
- New launches
  - Every printed book can now be downloaded to a mobile devices using Canvera's app and from the app shared on Facebook, WhatsApp
- Photographers directory basis city and location

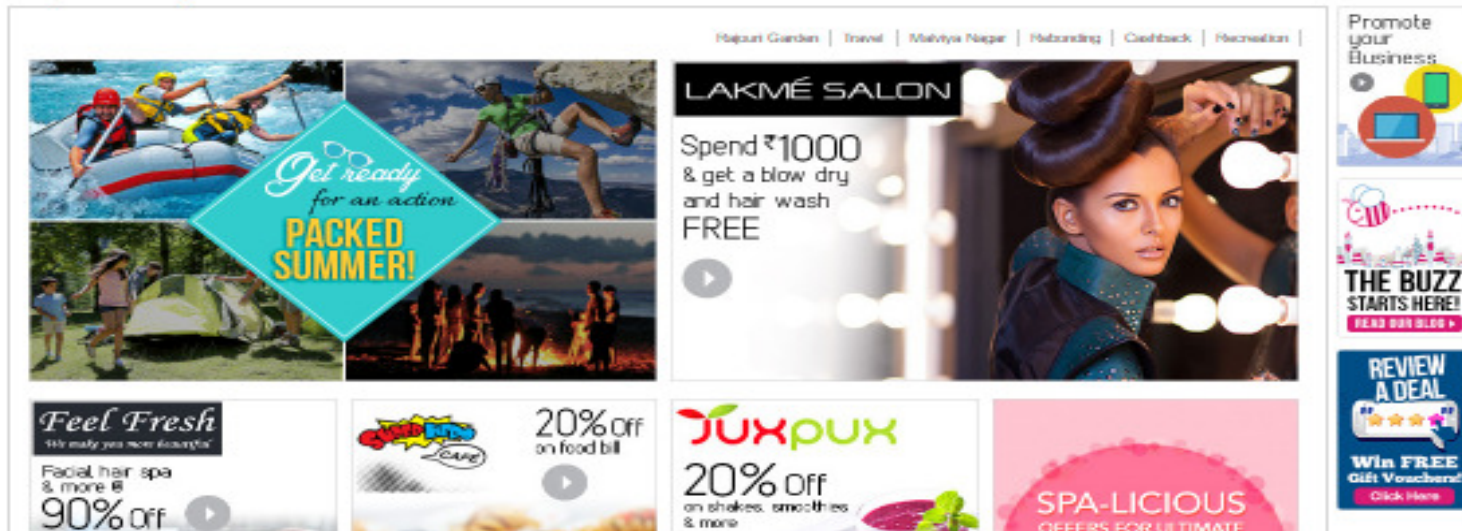


# Mydala



The banner features the Mydala logo at the top left, with the tagline "More Savings". Navigation links include "I am in Delhi NCR", "Invite Friends", "Get my APP", "Cart (0)", and "Sign In / Sign Up". A secondary navigation bar lists categories: "Food and Drinks", "Spa", "Salon", "Tattoos", "Health and Fitness", "Online Coupons", "Activities & Hobbies", and "Shopping". The main banner text reads "Discover great deals & discounts in Delhi NCR" with a search bar below it containing the text "Search 140,000+ deals & offers from 100,000+ brands". A small text below the search bar says "Eg: Gym, Airport offers, Top Salons, Sweets, Hair Salons, Restaurants".

## Top Selling Deals in Delhi



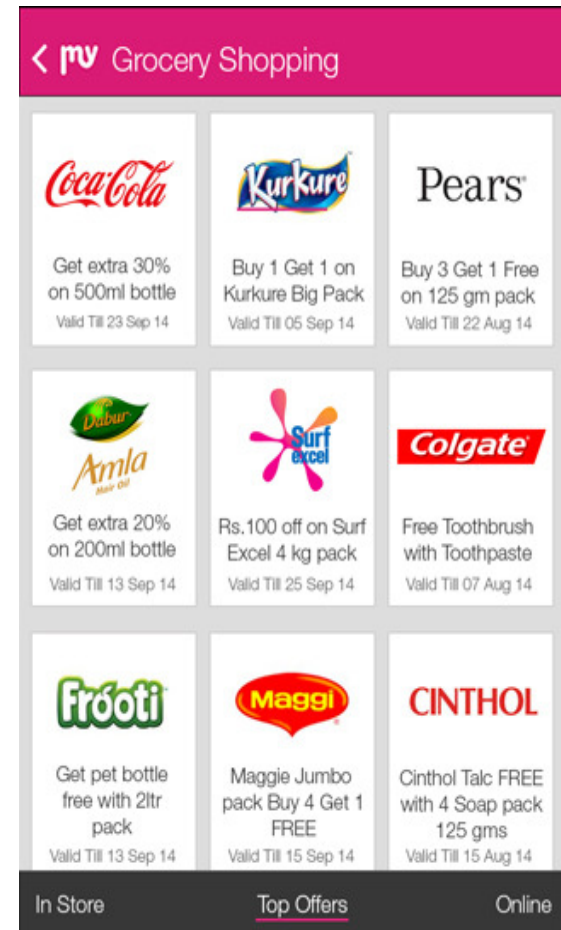
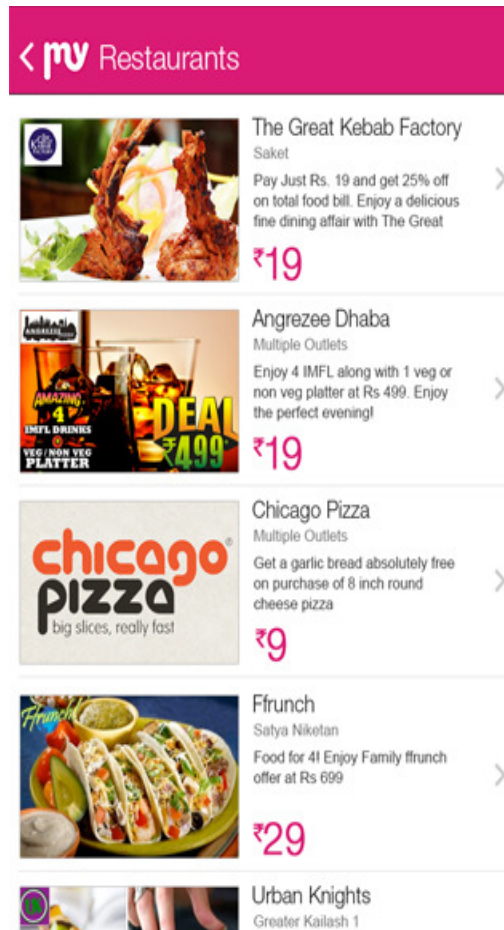
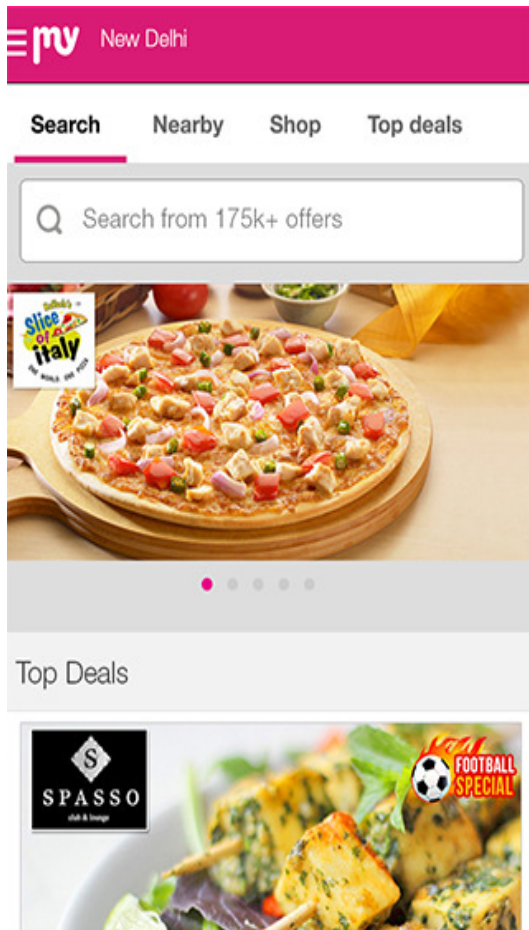
A grid of promotional tiles for various deals. The top row includes a "PACKED SUMMER!" tile with images of rafting and climbing, a "LAKMÉ SALON" tile offering a blow-dry and hair wash for ₹1000, and a "Promote your Business" tile. The second row features a "Feel Fresh" tile for a 90% off on facial and hair spa, a "20% off on food bill" tile, a "JUXPUX" tile for 20% off on shakes and smoothies, and a "SPA-LICIOUS" tile. On the right side, there are three vertical tiles: "Promote your Business", "THE BUZZ STARTS HERE! READ OUR BLOG", and "REVIEW A DEAL Win FREE Gift Vouchers! Click Here".

# Mydala

- India's largest promotion led local services marketing platform
- Vision is to make it a daily habit with consumers and businesses
- About 50 mn visitors and 5 mn transacting customers every month
- One of the largest mobile commerce platforms in India
- Large addressable market



# Mydala app



# Happily unmarried

**SAVE FOR BEER OFFER**

Buy 3 products ₹ 200 off!  
Buy 5 products ₹ 400 off!

Body Wash | Shaving Cream | Hair Wax | Aftershave Balm | Face Wash

**BUY**

**USTRAA**  
by HAPPILY UNMARRIED

Beard Wash | Beard Softener | Moch Wax

**BUY**

**50% OFF**

**100% CHILLED**  
ON SELECT PRODUCTS ONLY

**BUY**

## OUR PRODUCT CATEGORIES

Bar | Apparel | Home Accessories | Bags | Stationery

# Happily Unmarried

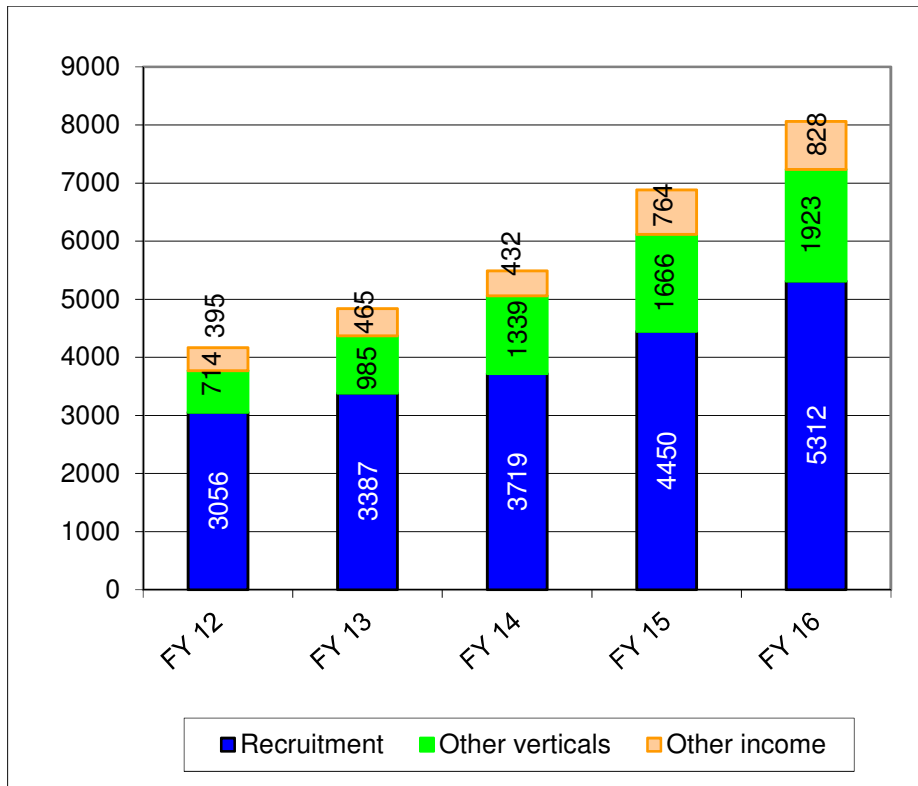
- Grooming range for men “Ustraa”
- Designs and sells fun products
  - With an Indian touch
- Proportion of online sales growing rapidly

# Financials

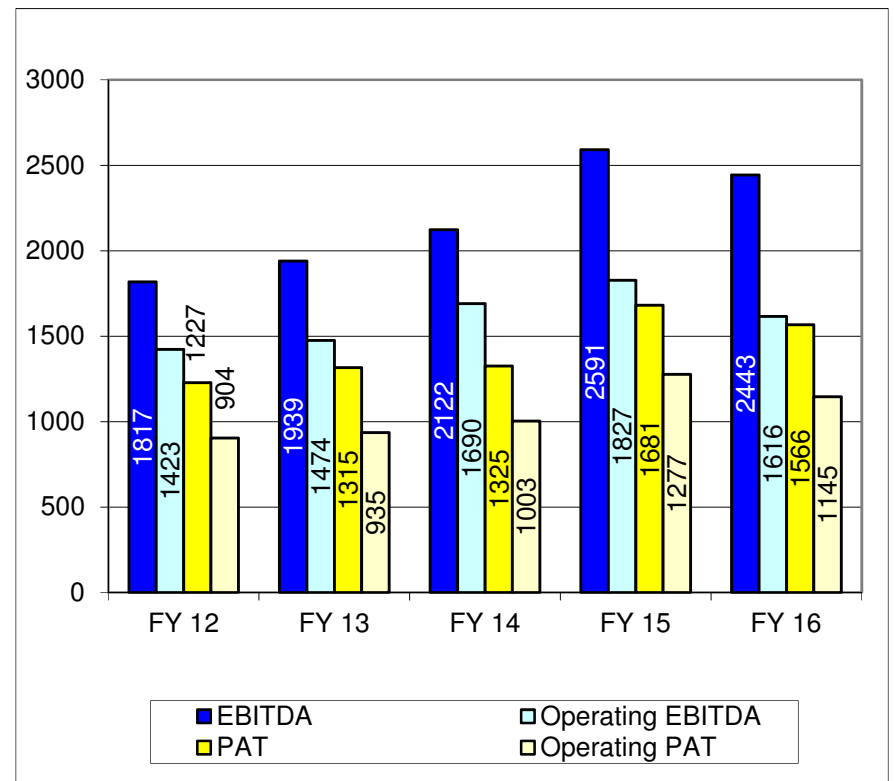
(Standalone)

# Consistent long-term growth in Revenue & Profitability

INR Million **Revenue**



INR Million **Profitability**



In FY 16, Recruitment was 73.4% and Other Verticals 26.6% of the standalone Operating Revenue of Rs 7,235 mn

EBITDA and PAT nos. above exclude the CSR expense of about Rs 36.0 million in FY 16

In FY 16, on a consolidated basis, Operating Revenue was Rs 9,382.02 mn (Rs 7,235 mn on standalone basis) and PAT Rs (2518) mn (Rs 1,647 mn on standalone basis) on account of losses in investee companies

Other Income in the above chart is treasury income

**Investment in 99acres has compressed margins in FY 16**

# Team

# Management Team

Name	Age	Qualifications	Designation/ Role	Previously worked with	Year of joining
Sanjeev Bikhchandani	52	BA Economics St. Stephens, PGDM IIM-A	Founder and Executive Vice Chairman	Lintas, Glaxo Smith Kline	1995
Hitesh Oberoi	43	B Tech, IIT Delhi, PGDM, IIM-B	Managing Director and CEO	HLL (Unilever)	2000
Vivek Khare	45	M. Sc (Physics) IIT – Kanpur, PGDBA-Birla Institute of Management Technology	Executive Vice President	-	2000
Deepali Singh	42	B Sc, LLB, Delhi University, PGDBA, IPM	Executive Vice President Firstnaukri	Aptech	2000
Arif Ismail Parker	41	BA	Executive Vice President- Sales	ITNation.com	2000
Vibhore Sharma	41	B Sc, IGNOU	Chief Technology Officer Naukri	Pioneer	2001
Suresh V.	44	BE, Masters in Management, Sathya Sai Institute of Management	Chief Sales Officer - Naukri.com	Xerox	2001
Neeraj Sharma	43	B.Com , PGPM	Executive Vice President- Sales	RPG Group	2001
Niraj Kumar Rana	40	BSC, MBA	Executive Vice President- Sales	-	2001
Manoj P	41	BE- University of Mysore MBA - Xavier Institute of Management and Entrepreneurship	Executive Vice President- Sales	Indian Seamless Group	2002
Harveen Singh Bedi	44	PGDBA-Birla Institute of Management Technology	Executive Vice President Quadrangle & Ehire	Nestle	2002
Dinesh P Kumar	40	MBA	Executive Vice President- Sales	Notre Advertising	2002
Satyajit Tripathi	42	BSc ,PGDBM	Executive Vice President- Sales	-	2002
Ambrish Kumar Singh	42	Btech, MBA	Senior Vice President and Head Sales and Customer Delivery Shiksha	LSI Software, Pentasoft Tech	2003
Sudhir Bhargava	46	BE, MBA, FMS, Delhi University	Executive Vice President Corporate Finance	HSBC, ICICI Bank	2006
Sharmeen Khalid	44	MBA, IRMA	Chief Human Resources Officer	Polaris	2006
Shalabh Nigam	43	B Tech, IIT Kanpur	Chief Technology Officer - Jeevansathi, 99acres, Shiksha	Baypackets	2007
Rajesh Khetarpal	43	CA	Executive Vice President- Finance	Bharti	2007
Sumeet Singh	42	BBA, MBA	Chief Marketing Officer	CII	2007

## Management Team contd.

Name	Age	Qualifications	Designation/ Role	Previously worked with	Year of joining
Nishant Pandey	40	B Tech, IIT Delhi, MBA ISB	Executive Vice President- Product Development	Schlumberger	2008
Rinchan Gupta	37	BE - Comp Science	Senior Vice President Interaction Design	HP India	2008
Vivek Jain	42	B Tech, IIT Delhi, PGDM, IIM – B	Chief Product Officer-Naukri & Head-Naukri FF	Isoft, Adobe, IBM, ICICI Securities	2010
Maneesh Upadhyaya	37	B Sc, St Stephens, MBA, FMS, Delhi University	EVP & Business Head - Shiksha	HUL, Bain & Co.	2010
Tarun Aggarwal	41	B Tech, MBA IIM - A	Executive Vice President and Business Head- Naukri Gulf	HT Media, Tech Mahindra, HCL Technologies	2010
Amit Kumar Singh	39	B Tech - IIT Kanpur, PGDBM - IIM - C	Executive Vice President - Product Development	Adobe Systems, Citibank	2011
Manav Rajkumar Gupta	38	B.Tech , MBA - European School of Management and Technology, Berlin	Senior Vice President Product Development	Toostep, TCS, Mittal Steels	2012
Manish Gupta	36	PhD (Mathematics) - IIT Delhi	Senior Vice President	DRDO, Innovation Labs, Citi	2012
Murlee Manohar Jain	38	Bcom, CS	Associate Vice President-Secretarial & CS	Apollo Tyres	2013
Anurag Jain	38	MBA- ISB Hyderabad, MS - Wright State University	Sr. Vice President and Product Head Shiksha	Microsoft, Nokia, Dassault Systemes	2013
Chintan Arvind Thakkar	49	CA	CFO	Computer Associates	2014
Pankaj Jain	41	B.Tech - IIT Delhi, MS- Stanford University	Executive Vice President- New Projects	Spice Online Retail, Spice Televentures, Taxila, Siebel Systems	2014
Shailesh Chandra	42	BE - Delhi College of Engg, PGDBM- IIM A	Executive Vice President	Amazon, Genpact, Indian Railways, Maruti Udyog, Indian Petrochemicals	2014
Sanjay Suri	43	MS- University of California	Executive Vice President- Engineering	Tradus, ClearSenses, Videocrux, Amazon, Oracle	2014
Narasimha Jayakumar	42	MBA- London Business School, PGDM- IIM-B, B Tech- NIT Karnataka	Chief Business Officer- 99acres.com	TV18 Home Shopping Network Ltd, Google, Expedia, Galileo Int., TAS	2015
Jatin Bery	41	MSc Corp & Int'l Finance, Durham University, MBA (IMI), BA (Hons) Economics, St.Stephen's	Executive Vice President Corporate Development	Kotak Investment Banking, Ernst & Young, JPMorgan	2015

About 10% of the total employees are covered under ESOP



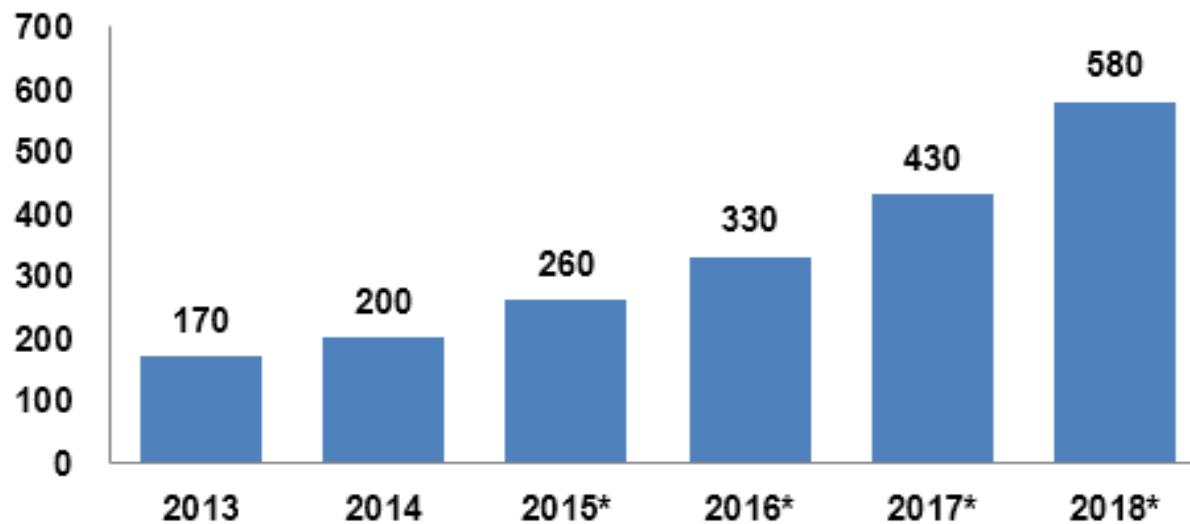
# Internet in India

# No. of internet users

- As per TRAI, number of internet subscribers were
  - 324.95 million as of 30.9.2015
  - 254.40 million as of 30.9.2014

Source : [http://www.trai.gov.in/WriteReadData/PIRReport/Documents/Indicator\\_Reports.pdf](http://www.trai.gov.in/WriteReadData/PIRReport/Documents/Indicator_Reports.pdf)

- Rapid growth expected (nos. in millions)



Note: \* Forecasts. Source: BCG.

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