

Thinksoft Global Services Ltd.

Earnings Presentation

Q2 FY 2014

EXPERTISE



**Collaborating with the global financial sector
to foster defect free, business ready systems**

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Particulars

- Performance Review
- Consolidated Financial Summary
- Operating Metrics
- Consolidated Quarterly P & L

Performance Review

Consolidated Q-o-Q Review

- Operating revenue was Rs. 50.4 crore during the quarter under review as compared to Rs. 43.0 crore during the sequential previous quarter reflecting an increase of 17% in rupee terms and in USD by 6% to \$ 7.9 Mn.
- Total income was Rs. 55.4 crore during the quarter under review as compared to Rs. 48.6 crore during the sequential previous quarter, an increase of 14 % and in USD by 3 % to \$ 8.7 Mn.
- The Company reported EBIDTA of Rs. 11.7 crore as compared to Rs. 10.7 crore during the sequential previous quarter.
- EBITDA Margin stood at 23.1% for Q2FY14 as against 25.0% in Q1FY14.
- Net profit stood at Rs. 10.6 crore during the quarter under review as compared to Rs. 10.3 crore during the sequential previous quarter, an increase of 3%.
- Basic EPS stood at Rs. 10.4, increase of 3% on sequential basis.

Consolidated 6m Review

- The operating revenue was Rs. 93.5 crore during the quarter under review as compared to Rs. 82.4 crore during the corresponding period of previous year reflecting an increase of 13% in rupee terms.
- Total income was Rs. 104.0 crore for the 6m period ended September 2013 as compared to Rs. 83.1 crore in the corresponding period of the previous year.
- EBIDTA stood at Rs. 22.4 crore during the quarter under review as compared to Rs. 16.8 crore during the corresponding period of previous year.
- EBITDA Margin at 24.0% during the period under review as against 20.4% in 6m ended September 30, 2012, up 358 bps.
- Net profit stood at Rs. 20.8 crore 6m ended September 30, 2013 as compared to Net profit of Rs. 11.3 crore in the corresponding period of the previous year an increase of 85% over the corresponding period previous year.
- Basic EPS stood at Rs. 20.5, increase of 83% over the same period last year.

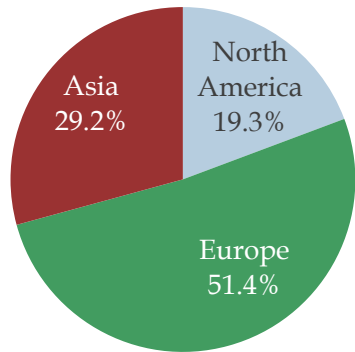
Consolidated Financial Summary

| Particulars | Metrics | 30-Sep-13 | 30-Jun-13 | QoQ | 30-Sep-12 | YoY | 30-Sep-13 | 30-Sep-12 | YoY |
|---------------------|------------------------------|-----------|-----------|--------|-----------|--------|-----------|-----------|--------|
| | | Q2 FY14 | Q1 FY14 | Growth | Q2 FY13 | Growth | 6m FY14 | 6m FY13 | Growth |
| Revenue | Total Revenue (INR M) | 554.4 | 485.8 | 14% | 414.5 | 34% | 1,040.2 | 831.4 | 25% |
| | Net Revenue (INR M) | 504.3 | 430.4 | 17% | 412.0 | 22% | 934.7 | 824.1 | 13% |
| Profit | EBITDA (INR M) | 116.7 | 107.5 | 9% | 57.3 | 104% | 224.2 | 168.2 | 33% |
| | PBT (INR M) | 147.8 | 143.3 | 3% | 46.5 | 218% | 291.1 | 152.5 | 91% |
| | PAT (INR M) | 105.5 | 102.5 | 3% | 38.1 | 177% | 208.0 | 112.5 | 85% |
| Margin | EBITDA | 23.1% | 25.0% | | 13.9% | | 24.0% | 20.4% | |
| | PBT | 26.7% | 29.5% | | 11.2% | | 28.0% | 18.3% | |
| | PAT | 19.0% | 21.1% | | 9.2% | | 20.0% | 13.5% | |
| EPS | Basic (Rs.) | 10.4 | 10.1 | 3% | 3.8 | 174% | 20.5 | 11.2 | 83% |
| | Diluted (Rs.) | 10.3 | 10.0 | 3% | 3.7 | 175% | 20.3 | 11.0 | 84% |
| ShareHolding | Promoters (%) | 53.7% | 53.8% | | 54.1% | | 53.7% | 54.1% | |
| | Public (%) | 46.3% | 46.2% | | 45.9% | | 46.3% | 45.9% | |

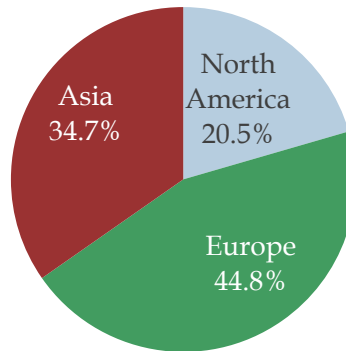
Operating Metrics

Revenue by Region

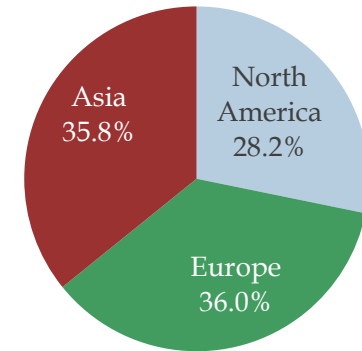
Q2 FY14



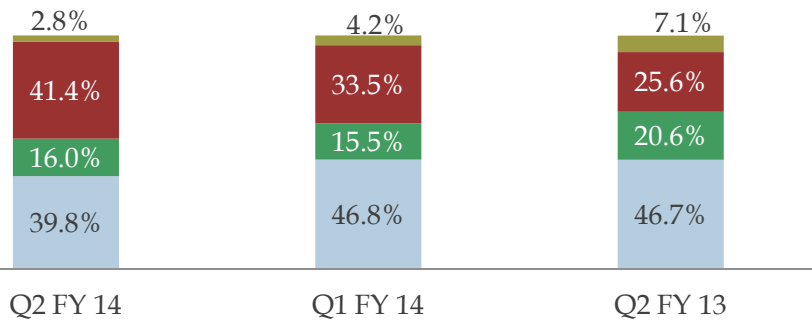
Q1 FY14



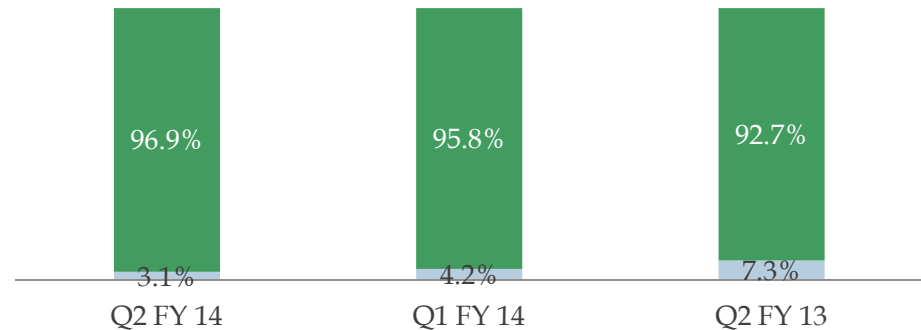
Q2 FY13



Revenue by Practice



Revenue Distribution

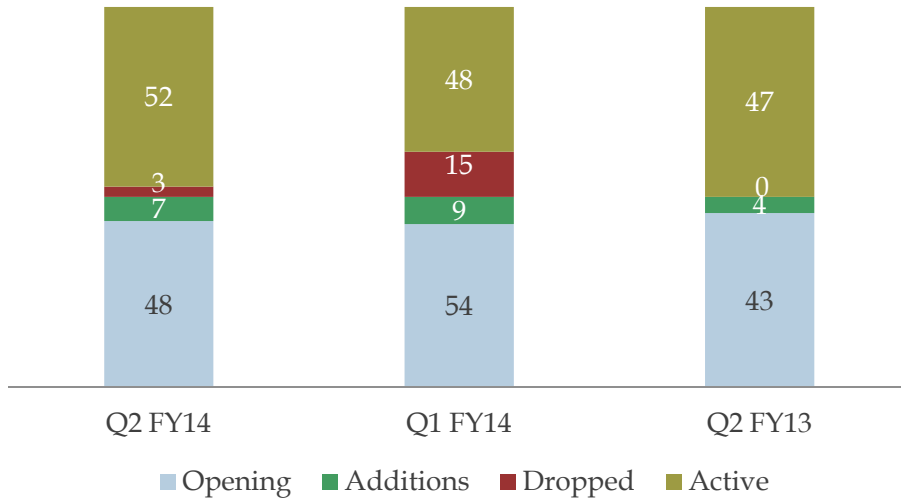


■ Banking
 ■ Capital Markets & Treasury
 ■ Cards & Payments
 ■ Insurance

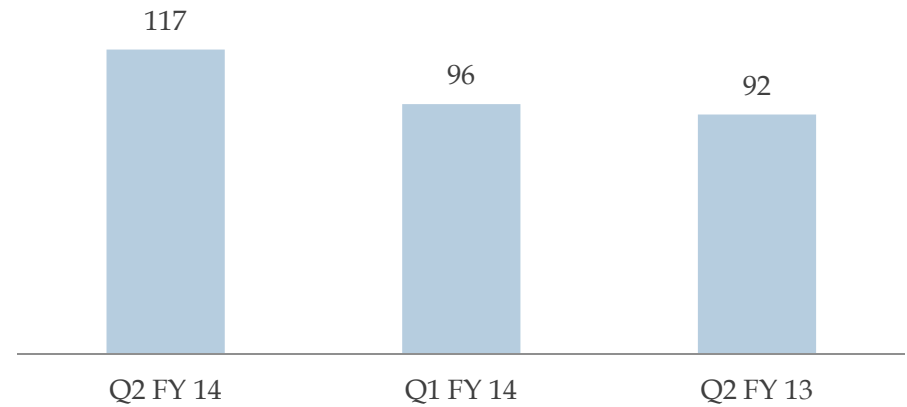
■ Domestic
 ■ International

Operating Metrics

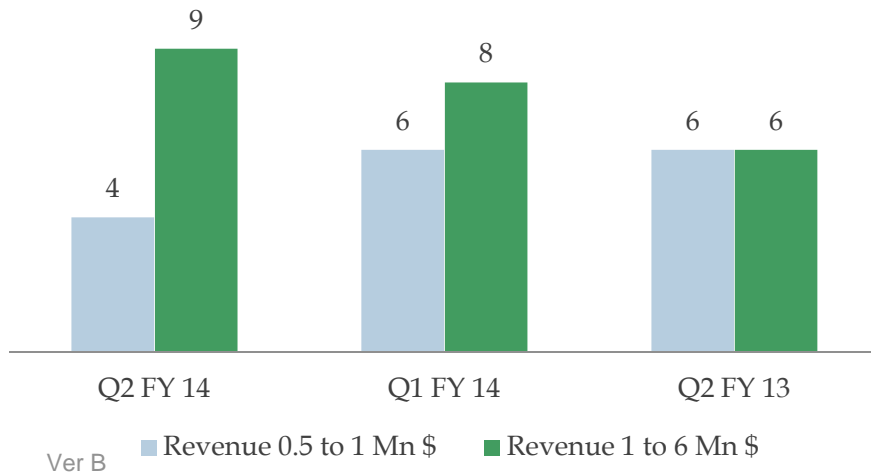
Clients Details



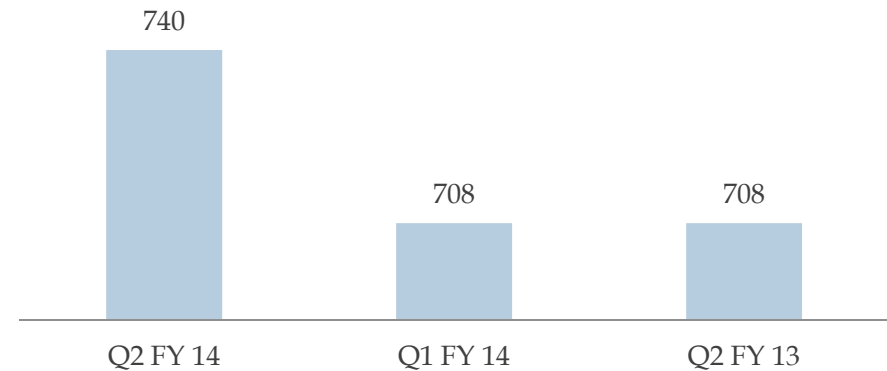
Debtors Days



Customer Profile (12m Rolling)



Employee Details



Consolidated Quarterly P & L

| Sr No. | Consolidated Unaudited Financial Statements for the Quarter ended (All figures in INR Million except EPS) | 30-Sep-13 Q2 FY14 | 30-Jun-13 Q1 FY14 | QoQ Growth | 30-Sep-12 Q2 FY13 | YoY Growth | 30-Sep-13 6m FY14 | 30-Sep-12 6m FY13 | YoY Growth |
|--------|---|----------------------|----------------------|---------------|----------------------|---------------|----------------------|----------------------|---------------|
| | Net Sales / Income from Operation | | | | | | | | |
| 1 | Income | 504.3 | 430.4 | 17% | 412.0 | 22% | 934.7 | 824.1 | 13% |
| 2 | Expenditure | | | | | | | | |
| (a) | Employee Cost | 290.9 | 245.2 | 19% | 224.0 | 30% | 536.1 | 476.7 | 12% |
| (b) | Depreciation | 13.9 | 14.4 | -3% | 9.2 | 51% | 28.3 | 18.5 | 53% |
| (c) | Other Expenditure | 96.7 | 77.7 | 24% | 130.7 | -26% | 174.4 | 179.2 | -3% |
| (d) | Total Expenditure | 401.5 | 337.3 | 19% | 363.9 | 10% | 738.8 | 674.4 | 10% |
| | Profit from Operations before Other Income, Interest & Exceptional Items (1-2) | | | | | | | | |
| 3 | Exceptional Items (1-2) | 102.8 | 93.1 | 10% | 48.1 | 114% | 195.9 | 149.7 | 31% |
| 4 | Other Income | 50.1 | 55.4 | -10% | 2.5 | 1904% | 105.5 | 7.3 | 1345% |
| 5 | Profit before Interest and Exceptional Items (3+4) | 152.9 | 148.5 | 3% | 50.6 | 202% | 301.4 | 157.0 | 92% |
| 6 | Interest | 5.1 | 5.2 | | 4.1 | | 10.3 | 4.5 | |
| 7 | Profit after Interest but before Exceptional Items (5-6) | 147.8 | 143.3 | 3% | 46.5 | 218% | 291.1 | 152.5 | 91% |
| 8 | Exceptional Items | - | - | | - | | - | - | |
| 9 | Profit(+)/ Loss (-) from Ordinary Activities before Tax (7+8) | 147.8 | 143.3 | 3% | 46.5 | 218% | 291.1 | 152.5 | 91% |
| 10 | Tax Expenses | 42.3 | 40.8 | 4% | 8.4 | 401% | 83.1 | 40 | 108% |
| 11 | Net Profit(+)/ Loss (-) from Ordinary Activities after Tax (9-10) | 105.5 | 102.5 | 3% | 38.1 | 177% | 208.0 | 112.5 | 85% |
| 12 | Extraordinary Items (net of tax expense Rs.) | | | | - | | - | - | |
| 13 | Net Profit(+)/ Loss (-) for the Period (11-12) | 105.5 | 102.5 | 3% | 38.1 | 177% | 208.0 | 112.5 | 85% |

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