



IntraSoft Technologies Limited

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August 11, 2017

Corporate Relationship Department
BSE Limited
P.J.Towers, Dalal Street,
Fort, Mumbai

Listing Department
National Stock Exchange of India Ltd
Exchange Plaza, Bandra Kurla Complex
Mumbai

Scrip code: 533181 / ISFT

Dear Sir,

Sub: Presentation on Financial Results and Business Performance

With reference to captioned subject matter, please find enclosed herewith the presentation on Financial Results and Business Performance of the Company for the quarter ended on June 30, 2017.

This is for your information and records.

Thanking You,

Yours faithfully,
For IntraSoft Technologies Limited

Pranvesh Tripathi
Company Secretary & Compliance Officer



Encl: as above

IntraSoft Technologies Limited

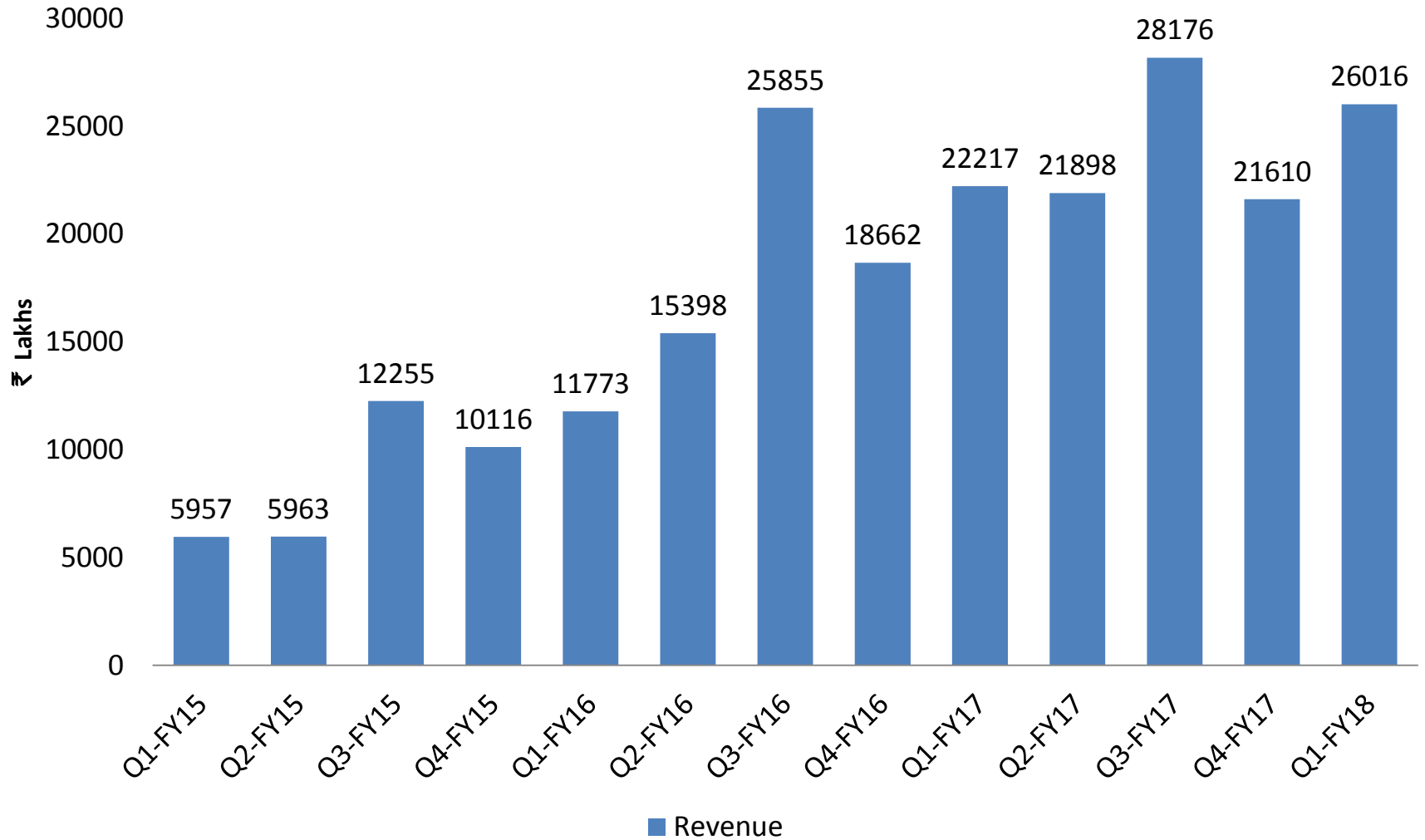


**Investor Presentation
11th August, 2017**

BSE: 533181, NSE: ISFT

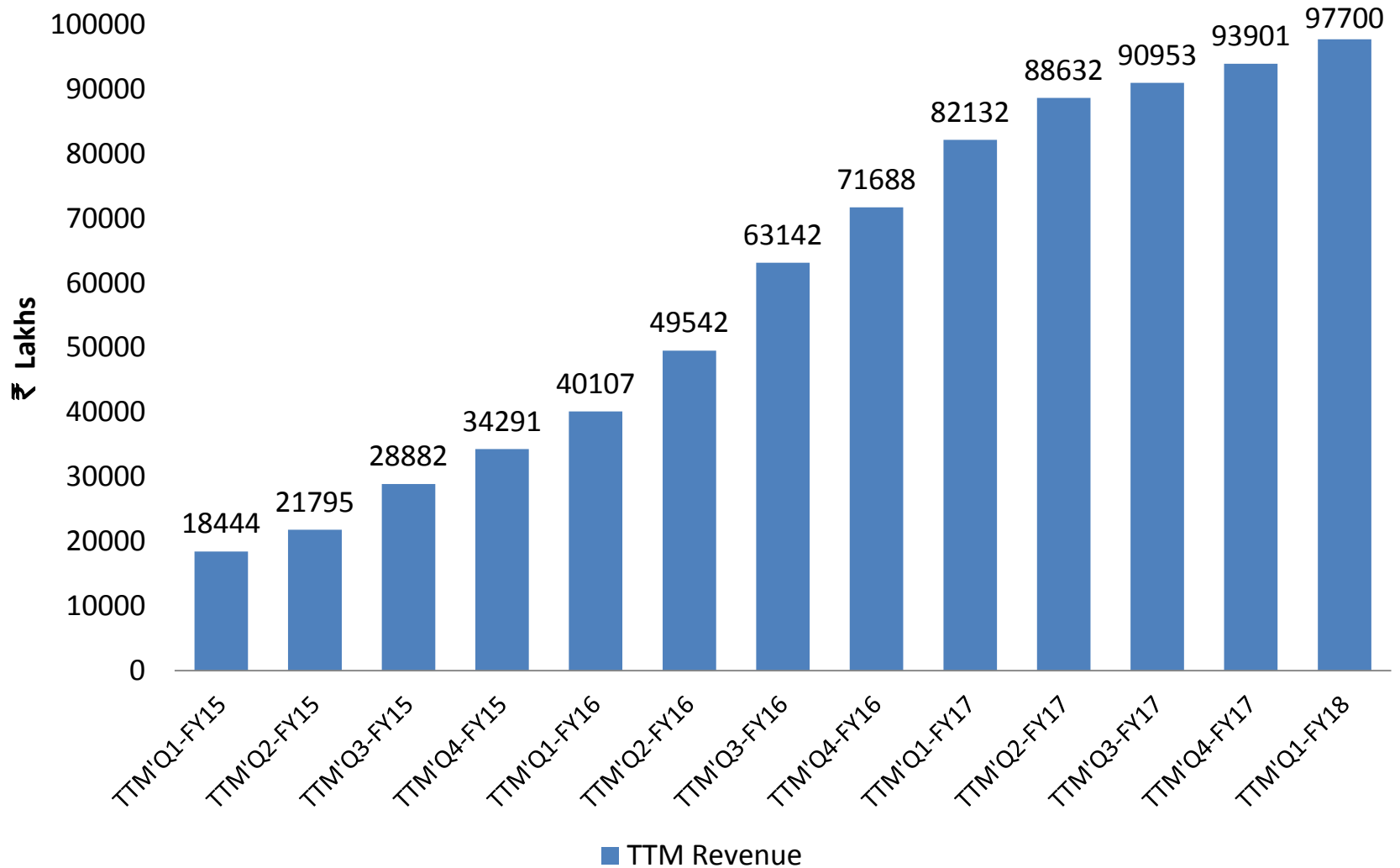


Revenue Continues To Grow Above Industry Rates





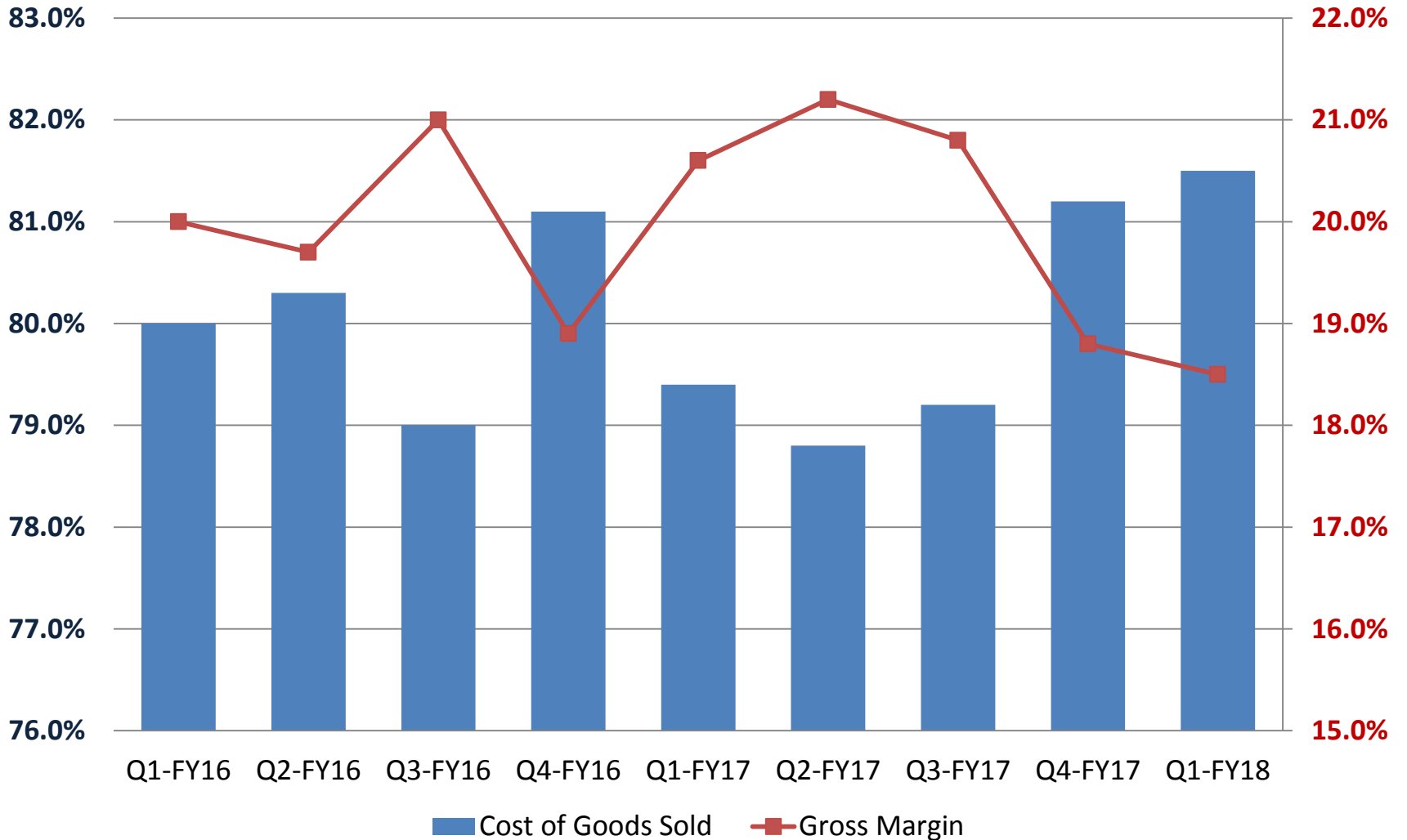
TTM Revenue Is On The Rise



TTM refers to Trailing Twelve Months



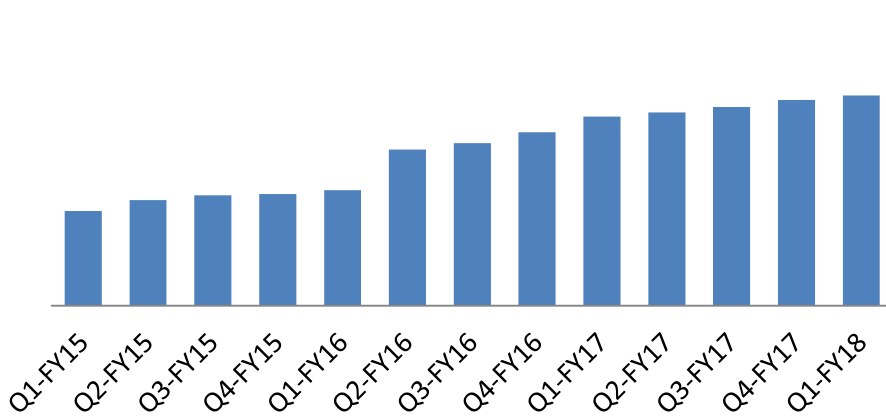
While Maintaining Gross Margin



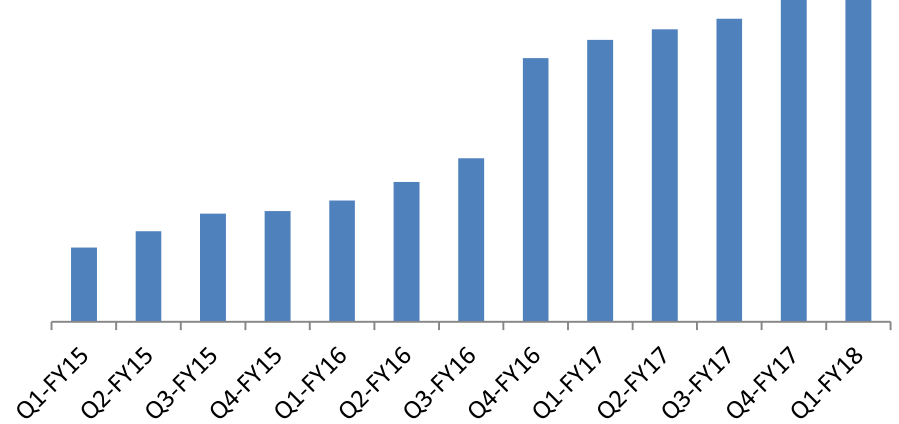


Growth in products & suppliers continue, whilst maintaining a healthy category mix

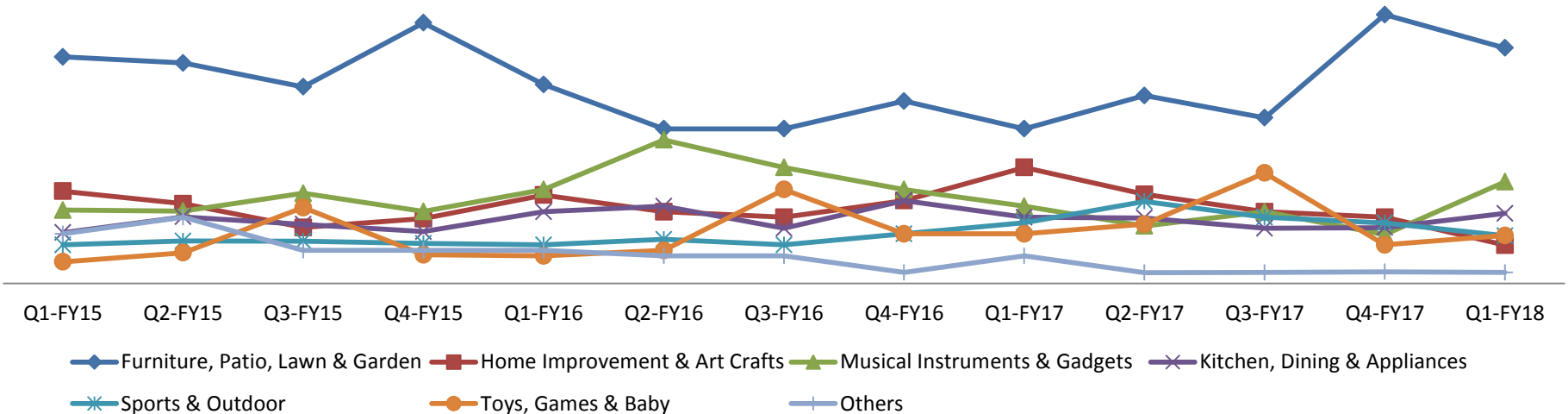
Number of Suppliers



No. of Products (SKUs)



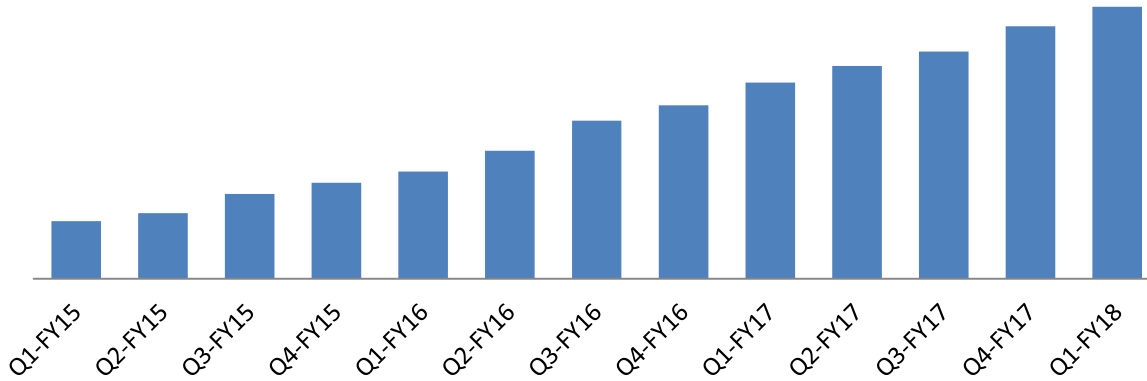
Diversified Category Mix





Investment in Technology and Automation continues to increase

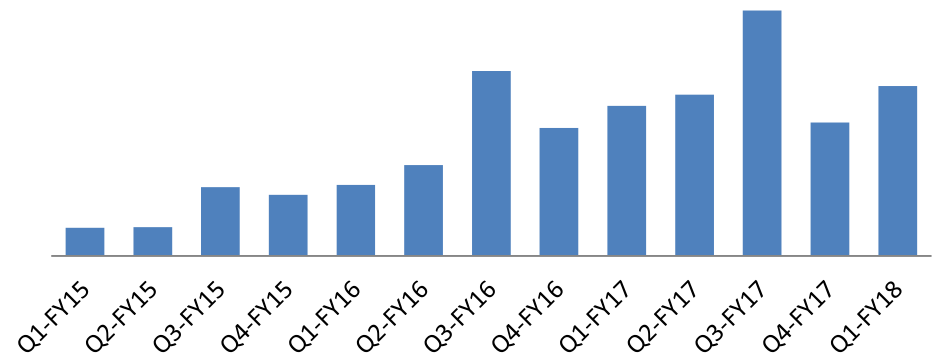
Revenues per Employee - TTM



Higher Levels Of Automation Leads To Improved Productivity

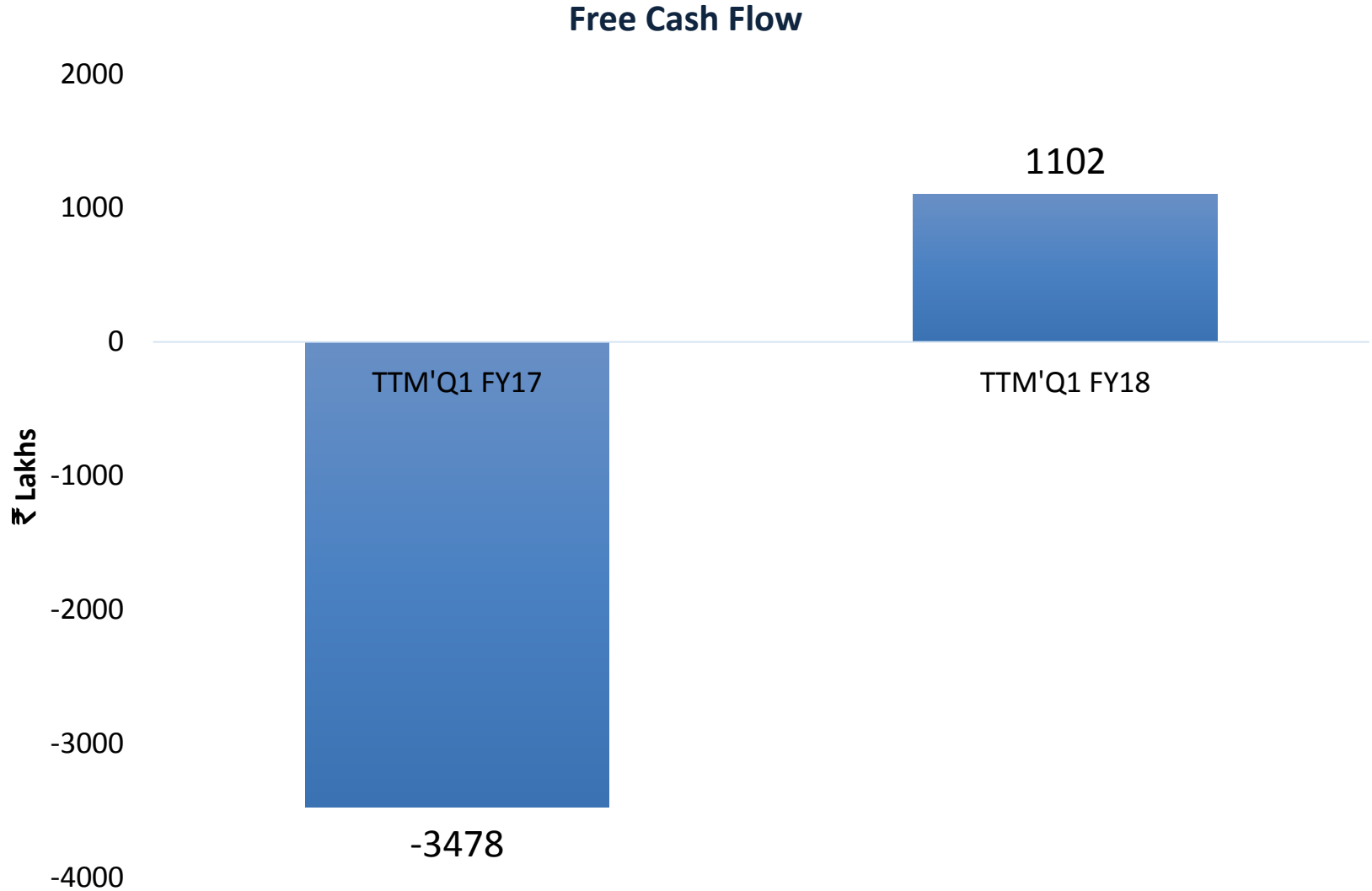
We Relentlessly Deploy Our Technological Expertise Towards Building Highly Automated Order Fulfilment Systems, Which Allows Us To Scale

No. of Orders





Free Cash Flow is being generated YOY...





Fast Moving Inventory Model

- **Only SKUs With High Saleability**

- Fast Moving SKUs And Longer Life Cycle Products
- Use Of Business Analytics And Business Intelligence
- Past History Of The Product

- **Fast Ship-out Times**

- Able To Ship Goods Out Quickly
- Better Control Over The Transaction



- **For Specific Season, Timeframe And Promotion**

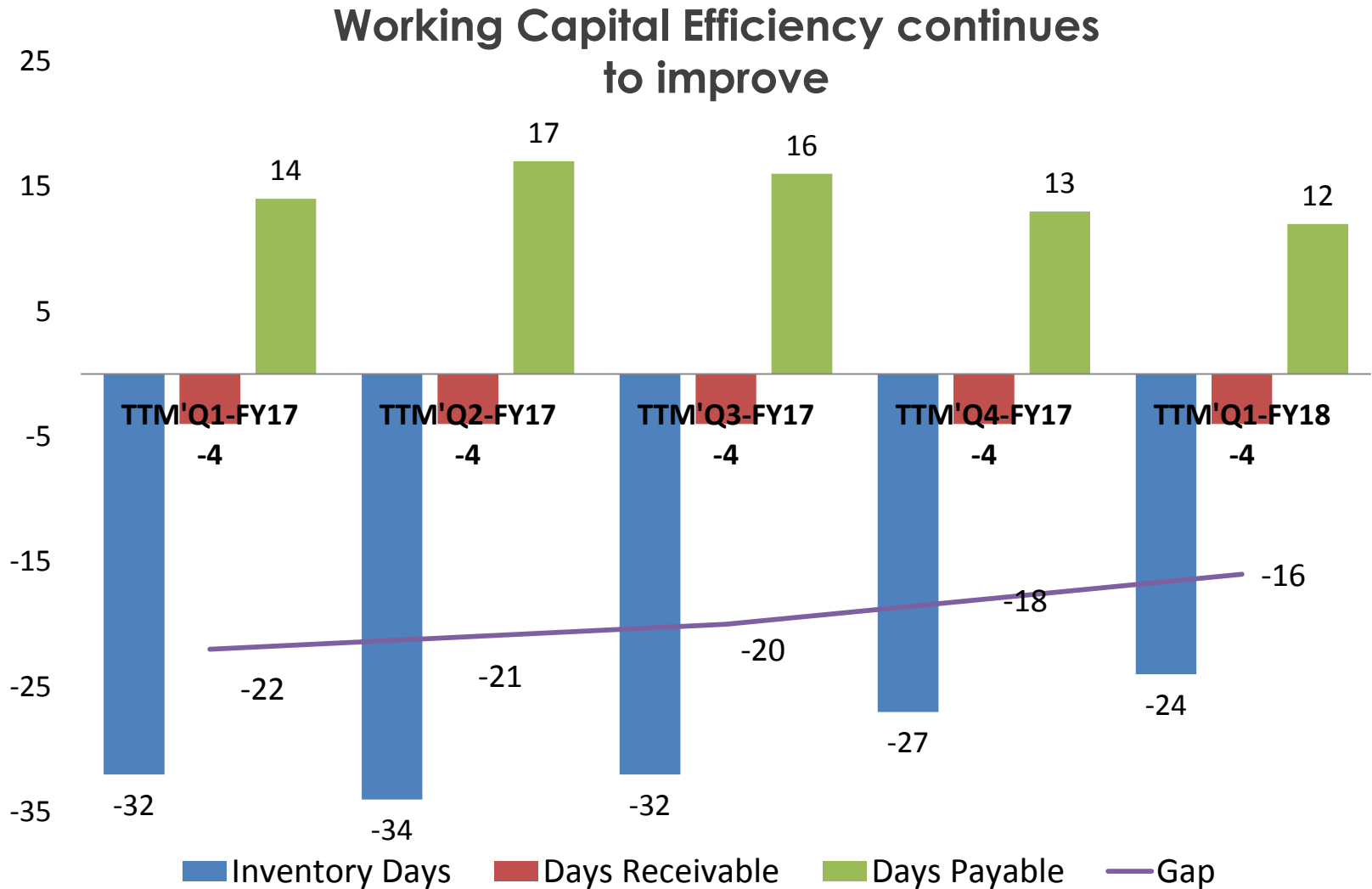
- We Anticipate Demand From Specific Occasions/Season
- Ensures Goods In Stock To Meet Holiday Expectations

- **Better Margins**

- Bulk Buying From Suppliers Reduces Costs
- Inward Transportation Becomes Competitive Because Of Bulk Buying
- High Inventory Turnover Ratio



Working Capital Efficient Business Model



Basis TTM (Trailing Twelve Months)



Financial Performance – IntraSoft Technologies Ltd

Unaudited Consolidated Profit & Loss For The Quarter Ended 30 June 2017		
Particulars	Quarter Ended	
	Jun-17	Jun-16
	₹ (In Lakhs)	
Revenue From Operations	26,016.43	22,217.10
Cost Of Goods Sold (Incl. Shipping)	21,213.61	17,629.18
Gross Profit	4,802.82	4,587.92
Sales & Marketing Expenses	3,487.33	3,239.90
Employee Benefits Expense	556.79	563.67
General & Administrative Expenses	364.82	324.79
Earnings /(Deficit) From Operations	393.88	459.56
Other Income	187.15	151.92
Earnings Before Interest, Tax, Depreciation & Amortization & Exceptional Item	581.03	611.48
Depreciation & Amortization	50.23	45.24
Earnings Before Interest, Tax & Exceptional Item	530.8	566.24
Finance Costs	31.91	72.07
Profit Before Tax (PBT)	498.89	494.17
Tax Expense	138.32	173.74
Profit After Tax (PAT)	360.57	320.43



Financial Performance – IntraSoft Technologies Ltd

Unaudited Consolidated Statement of Assets & Liabilities		
Particulars	As at	As at
	Jun - 17	Jun - 16
I. EQUITY AND LIABILITIES	₹ (In Lakhs)	
(1) Shareholders' Funds		
(a) Share Capital	1,473.17	1,473.17
(b) Reserves and Surplus	12,011.99	10,629.08
(2) Non-current Liabilities		
(a) Long-term Borrowings	3,559.75	3,873.70
(b) Deferred Tax Liabilities (Net)	108.54	77.22
(c) Other Long term Liabilities		
(d) Long-term Provisions	100.75	47.42
(3) Current Liabilities		
(a) Short-term Borrowings	-	763.02
(b) Trade Payables	2,199.21	3,099.52
(c) Other Current Liabilities	1,669.96	1,547.32
(d) Short-term Provisions	624.18	394.29
TOTAL	21,747.55	21,904.74
II. ASSETS		
(1) Non-current Assets		
(a) Fixed Assets	1,962.62	1,970.96
(b) Non-current Investments	496	496
(c) Deferred Tax Assets (Net)	-	-
(d) Long-term Loans and Advances	2,107.44	2,300.66
(2) Current Assets		
(a) Current Investments	6,711.23	5,980.13
(b) Inventories	6,158.65	5,758.93
(c) Trade Receivables	1281.72	822.46
(d) Cash and bank balances	2,408.74	2,904.82
(e) Short-term loans and advances	588.55	1,652.56
(f) Other current assets	32.6	18.22
TOTAL	21,747.55	21,904.74



Fact Sheet

Particulars	FY 2014-15					FY 2015-16					FY 2016-17					FY 2017-18
	Q1	Q2	Q3	Q4	FY	Q1	Q2	Q3	Q4	FY	Q1	Q2	Q3	Q4	FY	Q1
Revenue (₹ Lakh)	5957	5963	12255	10116	34291	11773	15398	25855	18662	71688	22217	21898	28176	21610	93901	26016
TTM Revenue (₹ Lakhs)	18444	21795	28882	34291	34291	40107	49542	63142	71688	71688	82132	88632	90953	93901	93901	97700
Y-o-Y Growth (Constant Currency)																22%
Y-o-Y Growth (INR)	153%	128%	137%	115%	131%	98%	158%	111%	84%	109%	89%	42%	9%	16%	31%	17%
% of Yearly Revenue	17%	17%	36%	30%	100%	16%	21%	36%	26%	100%	24%	23%	30%	23%	100%	
Cost of Goods Sold (Incl. Shipping)						80.0%	80.3%	79.0%	81.1%	80.1%	79.4%	78.8%	79.2%	81.2%	79.6%	81.5%
Gross Margin (%)						20.0%	19.7%	21.0%	18.9%	19.9%	20.6%	21.2%	20.8%	18.8%	20.4%	18.5%
End of Period Inventory (₹ Lakh)						1771	3237	4233	5530	5530	5759	5832	3588	2871	2871	4035
Inventory Turnover, average - TTM											11.5	10.8	11.4	13.4	13.4	15.5
Working Capital Cycle																
Inventory Days - TTM											-32	-34	-32	-27	-27	-24
Accounts Receivable Days - TTM											-4	-4	-4	-4	-4	-4
Accounts Payable Days - TTM											14	17	16	13	13	12
Working Capital Gap											-22	-21	-20	-18	-18	-16

End of Period Inventory = Inventory at the Fulfillment Centres, excluding Goods in Transit

Inventory Turnover Ratio = Cost Of Goods Sold by Average Inventory at the Fulfillment Centres, excluding Goods in Transit



IntraSoft Technologies Ltd

For Further Information, Please Contact

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