



S Chand And Company Limited

Registered Office: A-27, 2nd Floor, Mohan Co-Operative Industrial Estate, New Delhi - 110044, India.

P: +91 11 4973 1800 | F: +91 11 4973 1801 | E: info@schandgroup.com | www.schandgroup.com

Date: February 13, 2020

To Listing Department BSE Limited Phiroze Jeejeebhoy Towers, Dalal Street, Mumbai, Maharashtra 400001	To Listing Department, National Stock Exchange of India Limited Exchange Plaza, C-1, Block G, Bandra Kurla Complex, Bandra (E), Mumbai, Maharashtra 400051
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Dear Sir,

Re: Investors Presentation-Financial Results-quarter and nine months ended December 31, 2019-pursuant to Regulation 30 of The SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

The presentation for the analysts and investors for the conference call scheduled to be held on Friday, February 14, 2020 at 1:00 P.M. to discuss the financial results for the quarter and nine months ended December 31, 2019 is attached herewith.

The Company shall also disseminate the above information on the website of the Company i.e. www.schandgroup.com.

Request you to kindly take note of the same.

For S Chand And Company Limited




Jagdeep Singh
Company Secretary & Compliance Officer
Membership No.: A15028
Address: A-27, 2nd Floor,
Mohan Co-operative Industrial Estate,
New Delhi-110044

Encl: as above



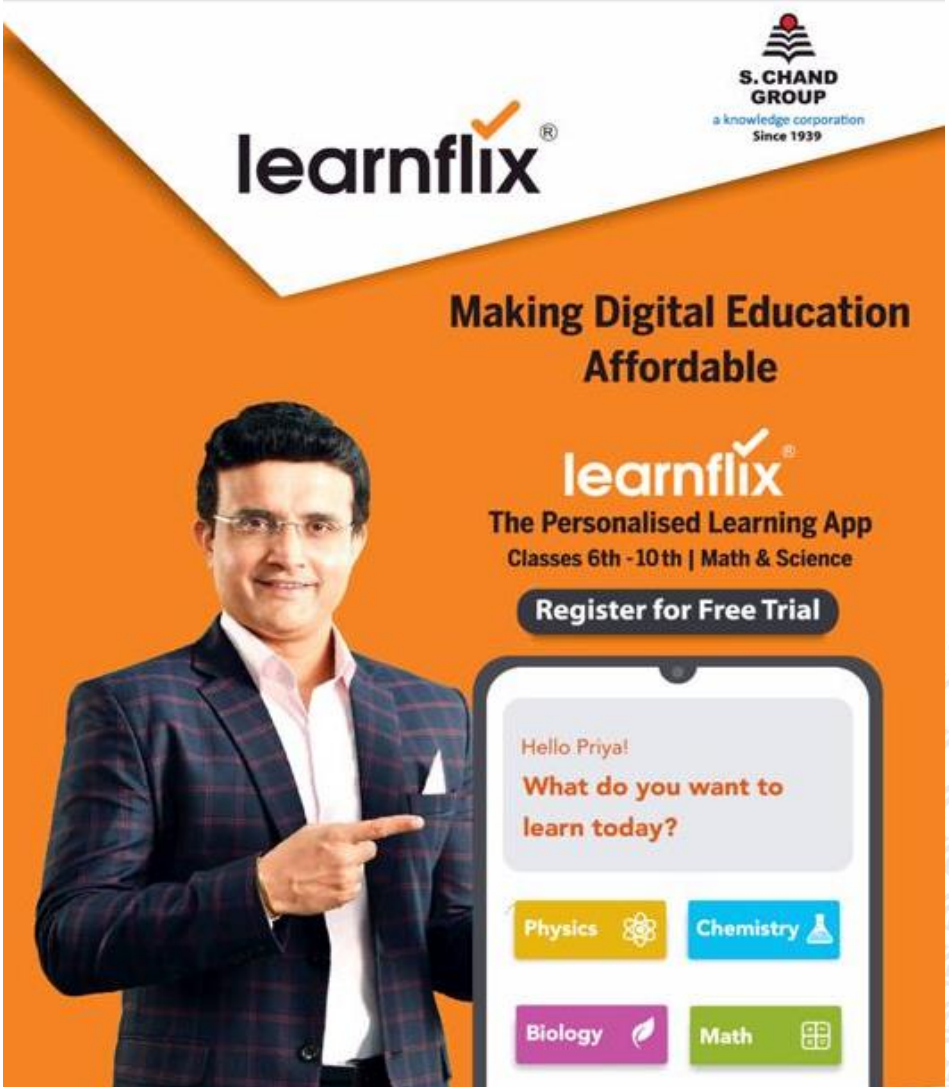
S. Chand and Company Limited

Q3 – FY2019-20

Investor Update

13th February, 2020

- KEY HIGHLIGHTS - 9MFY20 - TURN OPERATING CASH FLOW POSITIVE
- KEY HIGHLIGHTS – Q3FY20
- WORKING CAPITAL CYCLE – HIGHEST RECEIVABLE COLLECTION DURING 9M PERIOD
- WORKING CAPITAL CYCLE – HIGHEST IMPACT IN METRICS IN RECENT YEARS
- DIGITAL INITIATIVES – LAUNCH OF OUR LEARNING PLATFORM - LEARNFLIX
- DIGITAL INITIATIVES – UPDATE
- CONSOLIDATED FINANCIAL PERFORMANCE
- SHAREHOLDING STRUCTURE
- LOOKING AHEAD
- ANNEXURES



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KEY HIGHLIGHTS - 9MFY20 - TURNING OPERATING CASH FLOW POSITIVE



34%

Sales Growth
(YoY %)

16%

Reduction in EBITDA Losses
(YoY %)

19%

Reduction in expenses*
(YoY %)

8%

Reduction in PAT Losses
(YoY %)

Rs1,016m

Delta in Net cash generated from operations in H1FY20 over last year.

Rs96m

Turn Operating Cash flow Positive within 9MFY20 (vs. Rs -920m in 9MFY19)

209 Days

Reduction in receivable days in 9MFY20 (vs. Historic range of 120-140 days)

133 Days

Reduction in Net Working Capital Days in 9MFY20 (vs. Historic range of 30-70 days)

* Employee costs+ SG&A Expenses + Other Expenses

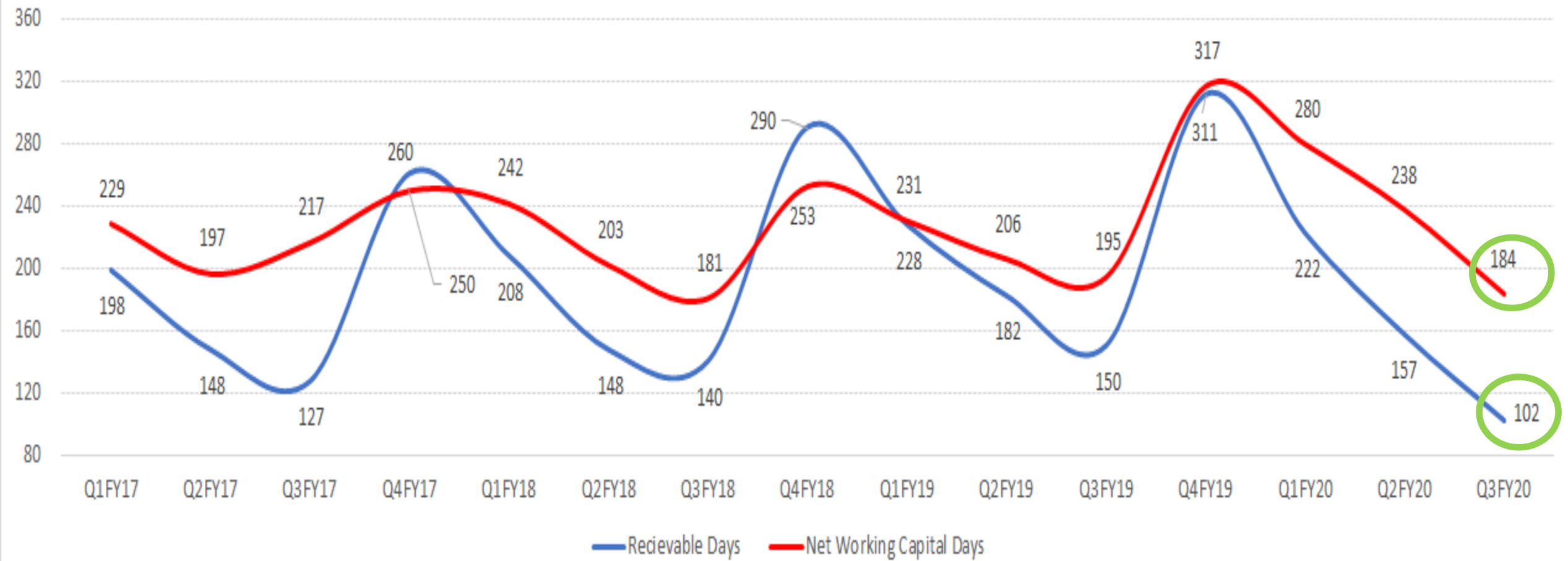
- **Operating Parameters - Strong focus on improving balance sheet metrics and cash flows yielding results**
 - **Operating cash flow delta of Rs1,016m vs. 9MFY19.** On back of our focus on “S Chand 3.0” implementation, we have turned operating cash flow positive during the 9MFY20 period. Operating cash flow for 9MFY20 stood at Rs96m (vs. Loss of Rs920m). This represents a delta of Rs1,016m in operating cash flows over last year.
 - **Trade Receivables** reduced to Rs1,533m in Q3FY20 vs. Rs2,326m in Q2FY20 & Rs4,446 as of Q4FY19. In terms of receivable days, it stood at 102 days (vs. 311 days in Q4FY19), a QoQ reduction of 55 days during Q3FY20 (vs. reduction of 32 days in Q3FY19) **and reduction of 209 days during 9MFY20 which has historically been between 120-140 day reduction. This is the lowest level of receivable days achieved in comparison to previous years.**
 - **Inventory** stood at Rs2,363m (vs. Q3FY19: Rs2826m, **Down 16% YoY**) at the end of the quarter. Our efforts to enter the season with controlled levels of inventory to efficiently manage working capital in the company has borne fruit. This is one of the lowest level of inventory that we have had in past years while entering our peak sales season.
 - **Net Working Capital** reduced to 184 days (vs. 238 days in Q2FY20 & 317 days in Q4FY19) which is a reduction of 54 days (vs. reduction of 12 days in Q3FY19). **We also reduced NWC by 133 days in 9MFY20 which has historically been around 30-70 days reduction.**

- **“S Chand 3.0” journey focused on increasing Free cash flows showing results**
 - Delta of over Rs1,016m in operating cash flows on a 9M YTD basis.
 - Employee costs at Rs948m is lower by 16% on a YTD basis.
 - SG&A expenses at Rs390m is lower by 39% on a YTD basis
 - Reduced sales returns from Channel partners during 9MFY20.
- **Gross Debt & Net debt stood at Rs2,247m and Rs2,075m respectively.** We are at a comfortable Debt to Equity ratio of 0.25x and we expect debt levels to reduce going ahead on back of higher free cash flow generation from business. Our working capital debt stands much lower at Rs1,260m vs 1,924m in Q3FY19 & Rs1,409m in Q4FY19.
- Launched extensive marketing campaign for Learnflix, our all-in-one learning platform for the Gen X student during January with full page advertisement in leading journal of NCR, Delhi – Times of India. Learnflix has already been downloaded over 5K times and we are looking at adoptions in the coming year in schools by over 10,000 students in coming months.

HIGHEST RECEIVABLE COLLECTION DURING 9M PERIOD



Receivable Days and Net Working Capital Days



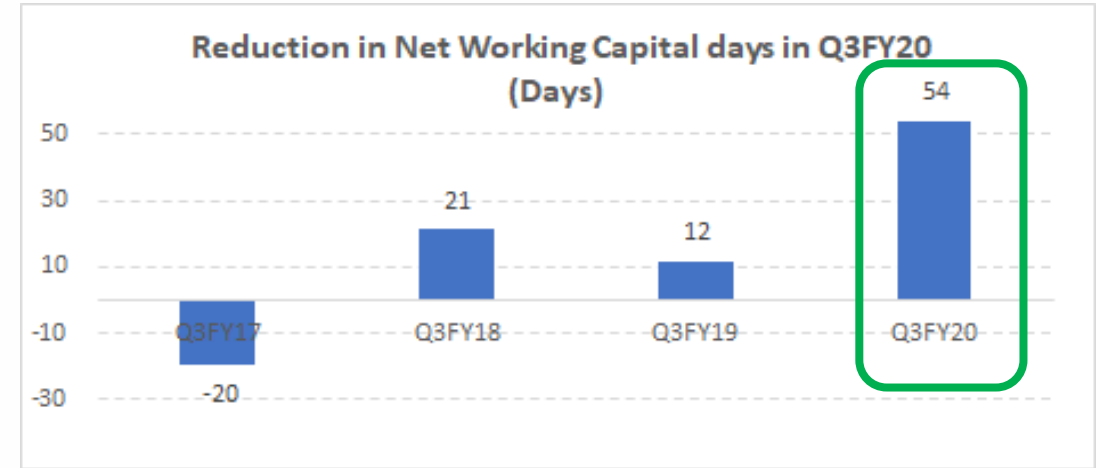
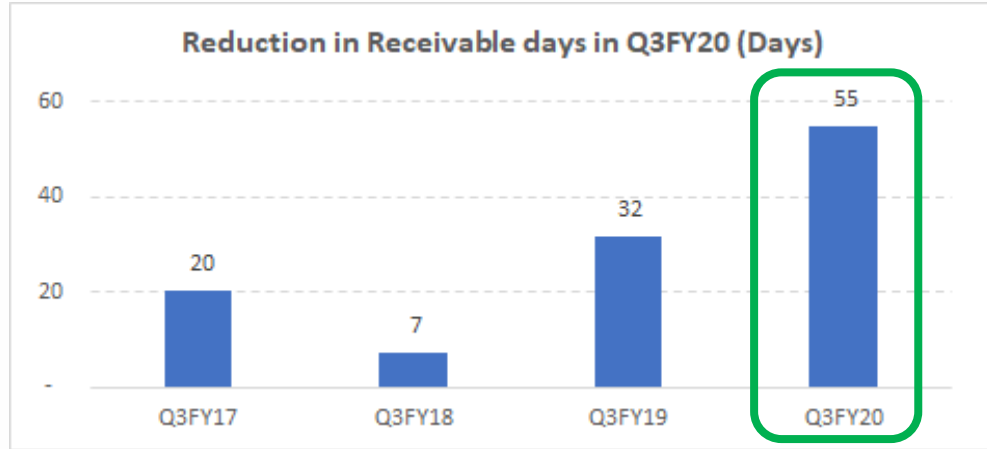
Q3 Receivable days & Net working capital at lowest historical levels

WORKING CAPITAL CYCLE – HIGHEST IMPACT IN METRICS IN RECENT YEARS

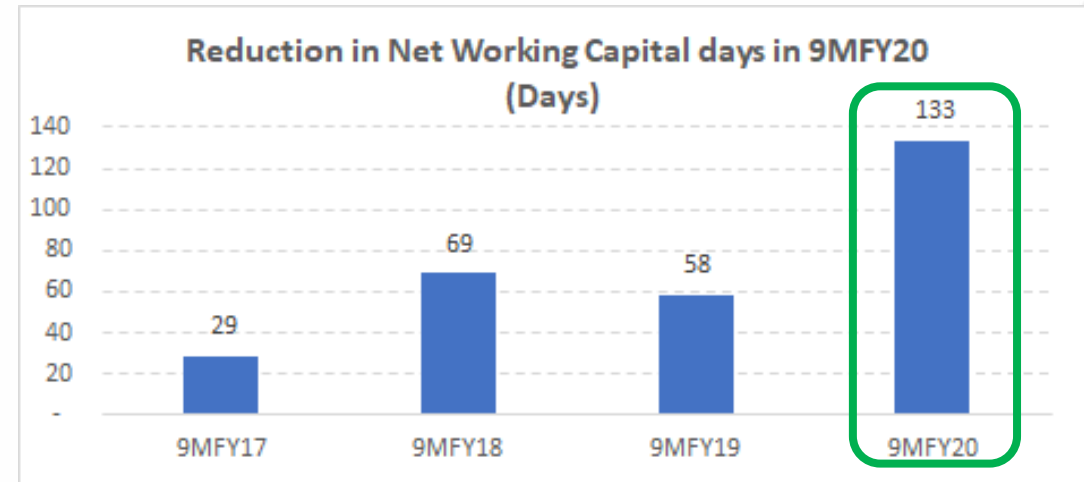
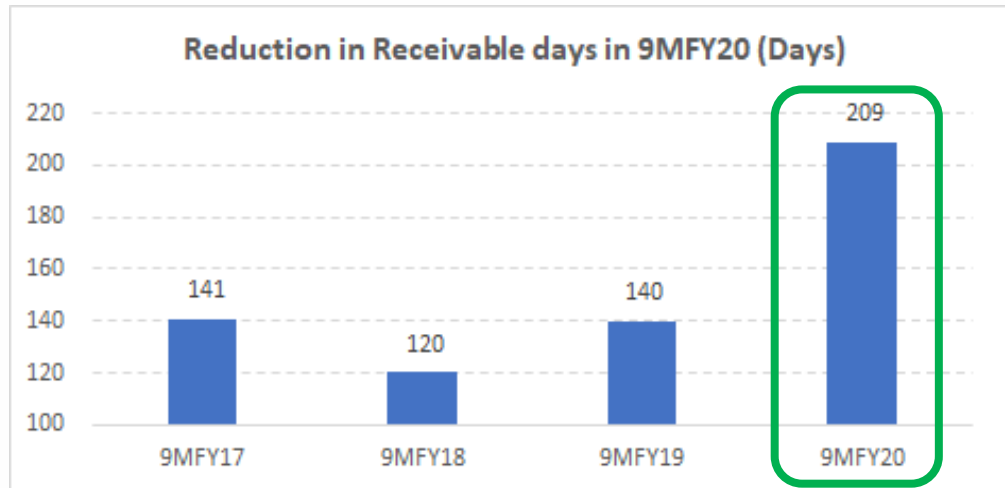


- Highest reduction seen in receivables and Net Working Capital days.
- This improvement is on back of our renewed focus on improving our collection efficiency and focus on effective working capital management.

Q3: Oct – Dec Qtr



9M: April – Dec



DIGITAL INITIATIVES – LAUNCH OF OUR LEARNING PLATFORM - LEARNFLIX



- Launched extensive marketing campaign for India’s most affordable learning platform, **Learnflix** (Android & Apple iStore), our all-in-one learning platform for the Gen X student during January with full page advertisement in leading journal of NCR, Delhi – Times of India.
- Learnflix has already been downloaded over 5K times and we are looking at adoptions in the coming season in schools by over 10,000 students.

THE TIMES OF INDIA

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• Concept Practice

Results
7/10 marks
89% accuracy
8 questions
42% correct answers

Personalised Learning Journey
Learn at your own pace anytime anywhere

Unlimited Practice & In-depth Analysis
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Remedial
Remedial at every step to master your development areas

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• 3 Assessment
View More >

1h 4m
• 1h 28m
• 10m

Concept Covered 68
Chapter Test Completed 18
Conceptual Understanding Components of Air

90% Correct Answers
• Answer Patterns
• Speed Accuracy
• Understanding Questions

For School Doms & Channel Partner Enquiries Contact +91 93549 60039

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- Mylestone – Have signed up approx. 300 schools YTD for FY21. Looking to grow Mylestone business strongly during this upcoming sales season.
- Test Coach – Our mobile mock exam App saw 5x spike in installations on a MoM basis on back of change in sales strategy. Monthly installations have moved up 5x from 700+ to 3.5K+ in recent months.
- MyStudygear App – Provides blended learning with our books with over 1 Mn + users. This app has been steady in terms of adding approx. 400K users on an annual basis.
- Two of our investee companies – Smartivity & Testbook saw strong follow-up round of fund raising. Our investments in these companies are valued at 10x of our original investments based on latest rounds of investments.
- Our other inhouse digital offerings include-:
 - *VRX – Virtual Reality with books with over 50,000 + users*
 - *Chhaya Learning App – Bengali/English Learning with books with over 100,000 + users*
 - *Destination Success – Enabling Digital classrooms*
 - *Nuri Nori, Risekids, Smart K - Early Learning*

S Chand digital solutions downloaded over 1.5m times by students. We look forward to increase this multifold with our newly launched Learnflix –India’s most affordable Learning Solution.



CONSOLIDATED FINANCIAL PERFORMANCE

(₹ in millions)	Q3FY20	Q3FY19	Y-o-Y%	9MFY20	9MFY19	Y-o-Y%	FY19
Revenue from operations	96	46	109%	975	729	34%	5,220
Other income	7	32	(80)%	40	74	(46)%	116
Total income	103	78	31%	1,015	803	26%	5,336
Cost of published goods/materials consumed	388	611	(37)%	711	1,173	(39)%	2,094
Publication expenses	52	32	63%	78	98	(20)%	154
Purchases of traded goods	(252)	(734)	(66)%	(173)	(1,007)	(83)%	(440)
(Increase)/decrease in inventories of finished goods and WIP	89	80	11%	193	221	(13)%	448
Gross Margin	(175)	88	(298)%	206	318	(35)%	3,081
<i>Gross Margin %</i>	<i>-170%</i>	<i>113%</i>	<i>n.a</i>	<i>20%</i>	<i>40%</i>	<i>n.a</i>	<i>58%</i>
Selling and distribution expenses	149	296	(50)%	390	640	(39)%	884
Employee benefits expenses	320	403	(21)%	948	1,127	(16)%	1,511
Other expenses	180	208	(14)%	595	616	(3)%	881
EBITDA	(824)	(819)	1%	(1,726)	(2,065)	(16)%	(195)
<i>EBITDA margin %</i>	<i>n.a</i>	<i>n.a</i>	<i>n.a</i>	<i>n.a</i>	<i>n.a</i>	<i>n.a</i>	<i>(4)%</i>
Finance cost	86	71	21%	258	182	42%	272
Depreciation and amortization expense	93	67	40%	271	177	53%	237
Profit/(loss) before share of loss in associates, exceptional items and tax	(1,003)	(957)	5%	(2,255)	(2,424)	(7)%	(705)
Share of profit/(loss) in associates	(13)	(10)	27%	(20)	(19)	4%	(14)
Exceptional items	-	(226)	(100)%	-	(284)	n.a	(233)
Profit/(loss) before tax	(1,016)	(1,193)	(15)%	(2,276)	(2,728)	(17)%	(953)
Tax	(267)	(378)	(29)%	(546)	(844)	(35)%	(283)
Profit/(loss) for the year	(748)	(815)	(8)%	(1,729)	(1,884)	(8)%	(669)
Earnings/(loss) per equity share (in ₹) (for discontinued and continuing operations)							
1) Basic	(21.4)	(23.3)	-8%	(49.4)	(53.5)	-7%	(19.1)
2) Diluted	(21.4)	(23.3)	-8%	(49.4)	(53.5)	-7%	(19.1)

9MFY20

**Employee
Costs: Down
16% YoY**

**S&D Exp:
Down 39%
YoY**

**EBITDA Loss:
Down by
16%**

S Chand and Company Limited			
Consolidated Balance Sheet as on 31st December 2019			
(₹ in millions)	As on 31st Dec 19	As on 31st Dec 18	As on 31st Mar 19
Assets			
Non-current assets			
Property, plant and equipment	964	1,042	1,152
Intangible assets	4,868	4,099	4,203
Capital work-in-progress	3	106	3
Intangible assets under development	88	142	107
Financial assets			
- Investments	222	237	242
- Loans	159	103	95
- Other financial assets	7	12	13
Deferred tax assets (net)	1,162	1,068	593
Other non-current assets	325	216	287
Total non-current assets (A)	7,797	7,024	6,695
Current assets			
Inventories	2,363	2,826	2,048
Financial assets			
- Investments	51	167	216
- Loans	60	56	67
- Trade receivables	1,533	2,887	4,446
- Cash and cash equivalents	121	66	604
- Other financial assets	18	89	91
Other current assets	128	310	152
Total current assets (B)	4,273	6,402	7,623
Total assets (A+B)	12,071	13,426	14,318

S Chand and Company Limited			
Consolidated Balance Sheet as on 31st December 2019			
(₹ in millions)	As on 31st Dec 19	As on 31st Dec 18	As on 31st Mar 19
Equity and liabilities			
Equity			
Equity share capital	175	175	175
Other equity			
- Retained earnings	919	1,404	2,639
- Other reserves	6,491	6,490	6,490
Non controlling interests	21	27	29
Total equity (C)	7,605	8,096	9,333
Non-current liabilities			
Financial liabilities			
- Borrowings	728	240	727
- Trade payables	-	7	7
- Other financial liabilities	338	5	8
Net employee defined benefit liabilities	55	85	52
Other non-current liabilities	49	9	7
Total non current liabilities (D)	1,170	346	801
Current liabilities			
Financial liabilities			
- Borrowings	1,260	1,924	1,409
- Trade payables			
- micro enterprises and small enterprises	100	34	117
- other than micro enterprises and small enterprises	1,039	1,871	1,826
- Other financial liabilities	571	825	590
Net employee defined benefit liabilities	6	6	9
Other current liabilities	285	289	196
Other provisions	35	35	37
Total current liabilities (E)	3,295	4,984	4,183
Total equity and liabilities (C+D+E)	12,071	13,426	14,318

CONSOLIDATED FINANCIAL PERFORMANCE



S. CHAND

	(₹ in millions)	(₹ in millions)	(₹ in millions)
	For the year ended 31 Dec. 2019	For the year ended 31 Dec. 2018	For the year ended 31 March 2019
A. Cash flow from operating activities			
Profit before tax	-2,276	-2,728	-953
Adjustment to reconcile profit before tax to net cash flows			
Depreciation and amortisation expenses	271	177	237
Loss on sale of property, plant & equipment (net)	-1	0	3
Interest income	-4	-13	-23
Net income on deemed disposal of associate	-	-2	-20
Miscellaneous amount written back	-13	-26	-19
Net gain on sale of current investments	-16		-19
Share of loss in associate	20	19	14
Interest paid on borrowings	251	172	256
Foreign exchange difference	1		-4
Employee stock option expense	1	2	2
Provision for bad debts and advances	229	78	161
Bad debt written off	18	2	27
Operating profit before working capital changes	-1,519	-2,317	-336
Movement in working capital:			
(Increase)/ Decrease in inventories	-315	-1,264	-486
Decrease/ (Increase) in trade receivable	2,667	3,346	1,678
(Increase)/ Decrease in loans and advances	-57	-30	-11
(Increase)/ Decrease in other financial assets	101	-64	-55
Increase in provisions	2	18	18
(Decrease)/ Increase in trade payable	-792	-210	-52
Increase in current liabilities	83	45	109
Cash generated from operations	169	-476	864
Direct taxes paid (net of refunds)	-73	-445	-478
Net cash generated from operating activities (A)	96	-920	386

	(₹ in millions)	(₹ in millions)	(₹ in millions)
	For the year ended 31 Dec. 2019	For the year ended 31 Dec. 2018	For the year ended 31 March 2019
B. Cash flows from investing activities			
Purchase of property, plant & equipment (including assets acquired)	-195	-337	-477
Acquisition of subsidiaries, net of cash acquired	-	-	-642
Investment in non current investments (including investments in associates)	-0	-23	-3
Purchase in current investments	-9	-98	-178
Proceed from sale of current investments	190	424	434
Proceed from sale of property, plant and equipment	15	10	11
Dividend received	-	13	-
Interest received	11	-	16
Net cash used in investing activities (B)	12	-12	-839
C. Cash flows from financing activities			
Interest paid on borrowings	-261	-172	-253
Amortization of ancillary borrowing cost	6	1	-5
Proceed from long term borrowings	-21	-	863
Repayment of long term borrowings	-63	92	-115
Proceed/(repayment) from short term borrowings	-149	477	-39
Lease Rental Payment	-103	-	-
Dividend paid on equity share	-	-52	-52
Tax on equity dividend paid	-	-11	-11
Net cash generated from financing activities (C)	-590	334	388
Net increase in cash and cash equivalents (A+B+C)	-483	-599	-65
Foreign exchange difference	-1	-0	4
Cash and cash equivalents at the beginning of the year	604	665	665
Cash and cash equivalents at the end of the year	121	66	604

Our efforts showing its benefits in 9M by generating higher operating cash flows to the tune of Rs1,016m on a YoY basis.

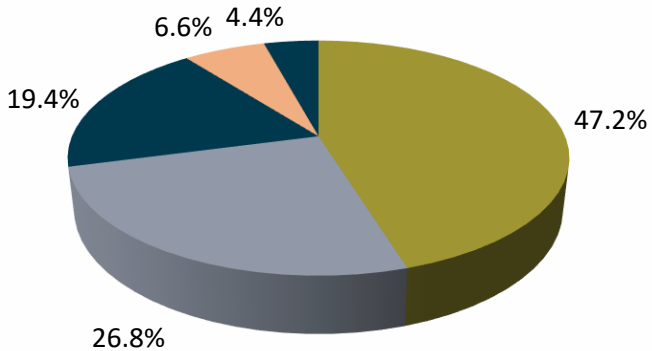
SHAREHOLDING STRUCTURE



Market Data	As of 12 th February, 2020
Market Capitalization (Rs Mn)	2,650
Price (Rs)	75
No. of shares outstanding (Mn)	34.95
Face Value (Rs.)	5.0

(Source: www.bseindia.com)

Ownership as of Dec, 2019



■ Promoter ■ Others ■ FPI & Foreign Company ■ Mutual Funds ■ AIF

(Source: www.bseindia.com)

Key Institutional Investors - As of December 2019	% Holding
Everstone Capital Partners II LLC	9.5%
International Finance Corporation	8.0%
HDFC Mutual Fund	2.6%
Volrado Venture Partners Fund	2.4%
Aditya Birla Sun Life Mutual Fund	1.9%
Sundaram Mutual Funds	1.6%
Aadi Financial	1.5%
BNP Paribas	1.1%

(Source: www.bseindia.com)

- **Short Term**

- EBITDA to FCF generation ratio of over 50% for FY20.
- Reduce Q4FY20 Net debt by 30%.
- Improve Receivable days, Inventory days & Net Working Capital vs. historical results.
- Target over 100k downloads and over 20K subscriptions of 'Learniflix', India's most affordable Learning Platform.

- **Medium term – 3 years**

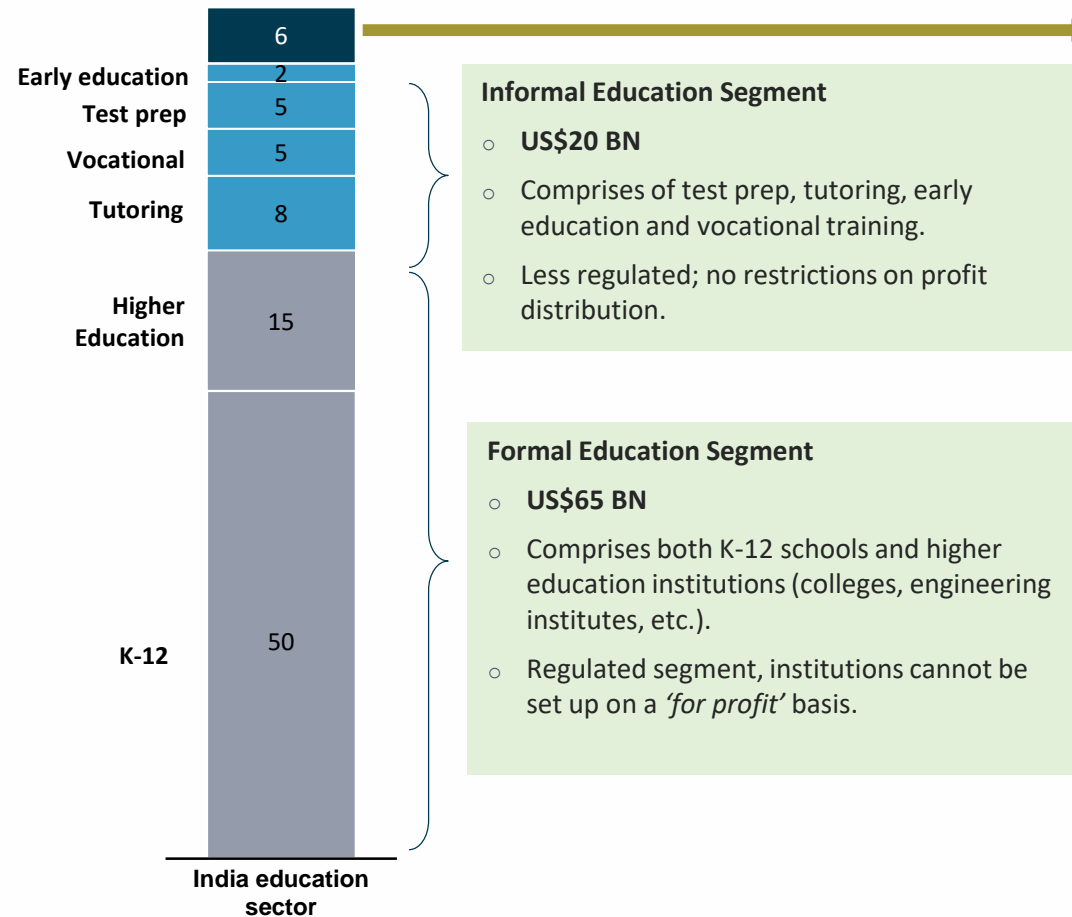
- Debt free in 3 years from the increased focus on free cash flows.
- Increasing the share of Digital & Services segment to 20- 25% over the next 3 years.
- Target over 1m downloads of 'Learniflix', India's most affordable Learning Platform and over 5m downloads across S Chand digital properties.



Annexure:

- **Indian Education Sector - Overview**
- **S Chand Group**

US\$90 BN Market Size for the Indian Education Sector



(Source: Technopak Research Report. Technopak Outlook on India's Schooling Segment June 2017. Nielsen: India Book Market Report 2015)

US\$6 BN Ancillary Education Segment

S. Chand operates in this segment (K-12/ Higher Education content).

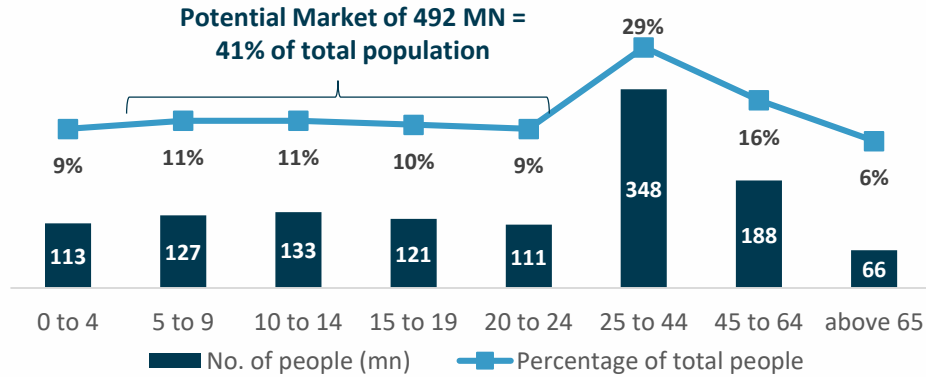
- Supports formal and informal education segments.
 - Comprises of content, digital content & services like curriculum management.
 - Mostly caters to K-12 & higher education institutions.
- Less regulated; no restrictions on profit distribution.
- K-12 ancillary market is a fast growing segment.



- Robust growth drivers.
 - Eligible K-12 population of about 296 MN students in age group 6 to 17 years.
 - Private unaided schools increased at average rate of 10.4% during 2011-15.
 - India has largest education system in the world with over 750 Universities & 35,000 colleges.
- Highly fragmented segment providing room for growth.

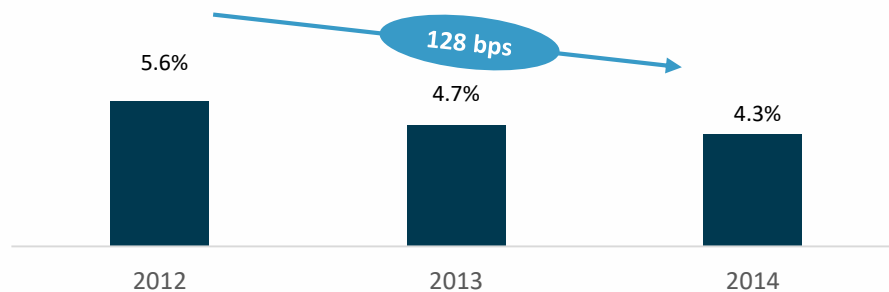
Age-wise population distribution in India : S. Chand target market

(Source: IBEF Report)



Decrease in drop-out rates for primary education in India

(Source: Nielsen Report)



Literacy rate improving with higher participation from students

(Source: Technopak's Outlook on India Schooling Segment)

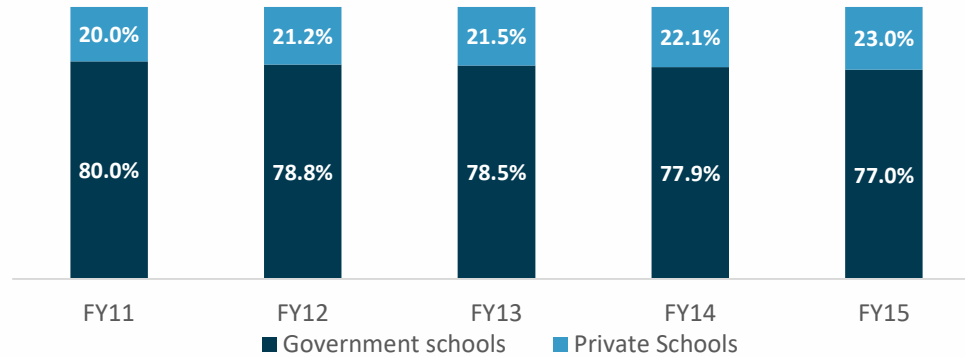
Level of Education	Estimated Population			
	% 2017 (MN)	% 2022 (MN)	% 2017 (MN)	% 2022 (MN)
Illiterate	20%	269	18%	250
Literate but no formal schooling	2%	27	1%	14
School - Up to 5th standard	35%	471	36%	501
School - Up to 10th standard	18%	242	18%	250
School - Up to 12th standard	11%	148	11%	153
Some college but not graduate	5%	67	5%	70
Graduate	6%	81	7%	97
Postgraduate	3%	40	4%	56
Literate	80%	1076	82%	1141
Total	100%	1345	100%	1391

S. Chand well positioned to benefit from sector tailwinds

- Gross enrolment ratio and students completing primary & secondary education gradually improving in India.
- Falling dropout rates and increased girls participation led to improvement in literacy rate.
- Government promoting education through various schemes with budgetary support.

Private schools market share increasing every year

(Source: IBEF Report)



CBSE & ICSE increasing faster amongst affiliated board schools

Board	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	CAGR
CBSE	11,349	12,337	13,898	14,778	15,933	17,474	19,446	9.4%
ICSE	1,461	1,565	1,678	1,798	1,927	2,181	2,295	7.8%
State Boards	13,16,401	13,63,862	14,47,487	14,65,871	14,60,455	NA	NA	NA
Total	13,29,211	13,77,764	14,63,063	14,63,447	14,78,315	NA	NA	NA

(Source : Nielsen Research Report, School Board reports, DISE)

Indian K-12 education infrastructure

(Source: Technopak's Outlook on India's Schooling Segment)

Number of Schools: 1.5 MN	
Government: 1.1 MN	Private: 0.4 MN
Number of Students: 260 MN	
Government: 150 MN	Private: 110 MN
No. of Teachers: 9 MN	
Government: 5 MN	Private: 4 MN
Annual Intake: 18 MN	
Government: 10 MN	Private: 8 MN
Additional Capacity Required: 36 MN	
Additional Requirement of Teachers: 2 MN	
Additional Resources: USD 55 BN	

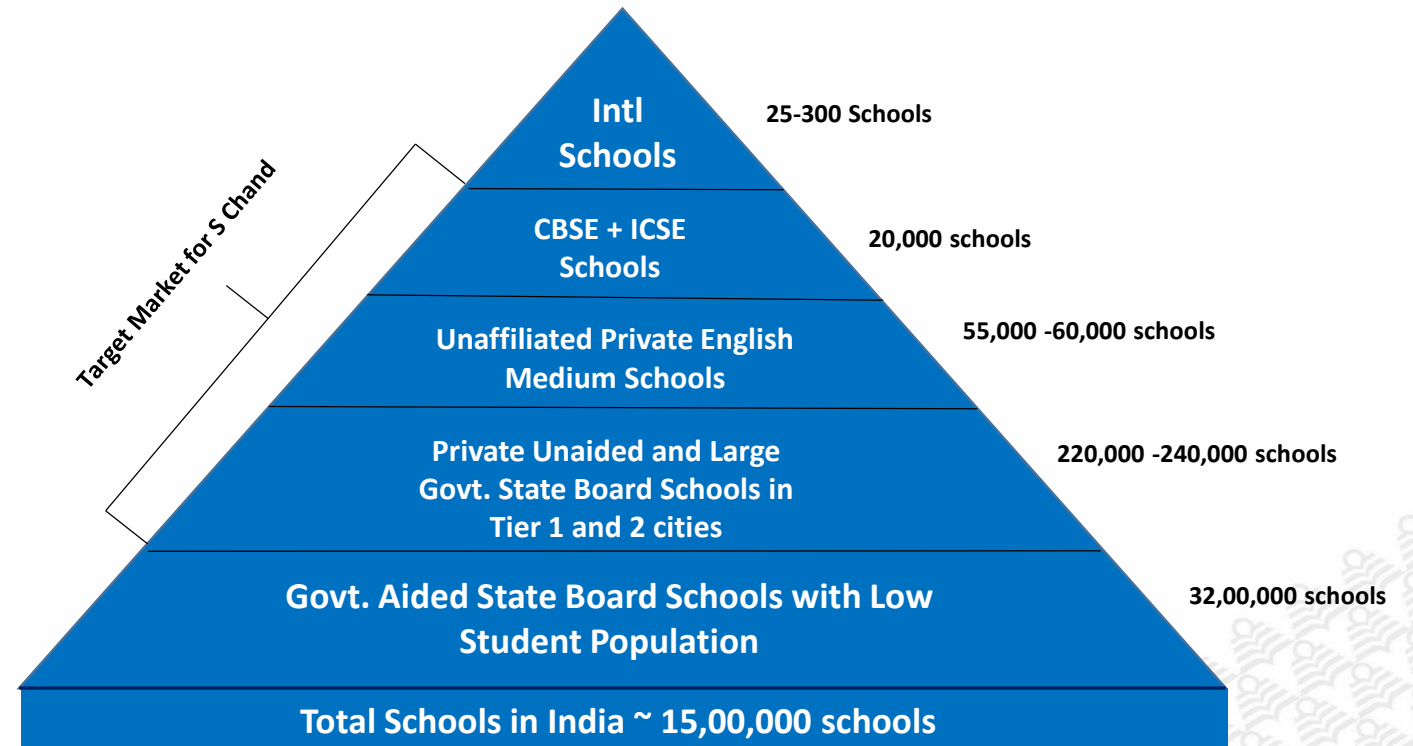
Preference towards private schools continue to rise

- Student share of private schools increasing consistently despite subsidised fees and free meals/ books in government schools.
- Government schools losing favour even amongst the rural and not so affluent population.
- CBSE and ICSE schools are preferred for their superior curriculum and better pedagogy.
- S. Chand is a key beneficiary of increasing number of CBSE and ICSE schools, being the leading content provider to such schools amongst the private publishers.

PREFERENCE TOWARDS PRIVATE, CENTRAL CURRICULUM SCHOOLS

Target Market is 3,00,000 schools – growing at 8-10 % annually and student strength growing at 7-8%

- Currently covering 38,000 schools in the target market
- Target market growing at 8-10% annually in the no. of schools
- Total student strength in India is est. 260 million
- Students strength in the target market is est. 120 million and growing at 7-8 annually.



Delivering content, services and solutions...

...across the education continuum

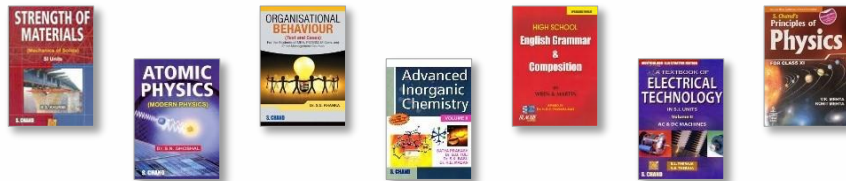
- Offerings spanning entire the education spectrum
 - Early learning
 - K-12
 - Higher education



...with Pan India reach

- Pan-India sales and distribution network driving deep market reach.
- Presence in Central (CBSE, ICSE) and State Board affiliated schools across India.

Strong content, multiple best-sellers.



- Long operating history of over seven decades.
- High brand equity across multiple brands.
- Strong author relationships.
- Keeping pace with time - transition from print into digital content and services.

80

Years of operating history

10,000+

Active book titles

~ 2,400

Author relationships

90 TPD

Print Capacity in number of sheets

Portfolio of brands focused on print / digital content.





Connecting with Learners

- Art of Book making tour of the Printing Facilities
- Mystudygear App / VRX App / Learnflix App / Test Coach App
- Social Media

Connecting with Teachers with

- Teacher Conclaves and Awards
- Over 2000 Workshops
- The Progressive Teacher magazine

Connecting with School Leadership

- Best Practices in Education Tour to Europe
- The Progressive School magazine

Connecting with Channel Partners

- Dealer Meets , Events and Awards
- Monthly mailer "Sampark"

Increasing Brand presence

- Brand Ambassador
- Strategic Advertising
- Digital Marketing



In-House (Revenue Stream)



- Offerings include **digital classroom learning solutions, learning management systems and curriculum management** which contribute to the revenue streams in the business.
- Approximated Investments is in excess of Rs1300 million.

Digital Investments (Inorganic)



- Focused on investing in **early stage digital companies**.
- Total investments in digital investee companies is approx. Rs.300m.
- Currently, Investment portfolio commands a valuation of around 2X as per the last funding rounds for respective companies.
- Focus is on **establishing synergies with core business** along with investment returns.



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