

February 10, 2022

To,
BSE Limited
Floor 25, Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai-400001
Security Code- 539978

To,
National Stock Exchange of India Limited
"Exchange Plaza", Bandra-Kurla Complex,
Bandra (East),
Mumbai-400051
NSE Symbol- QUESS

Dear Sir / Madam,

Sub: Investors Presentation

Pursuant to Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, we are enclosing herewith Investor's presentation on the financial performance of Quess Corp Limited ("Company") for the third quarter and nine months ended December 31, 2021.

The above said presentation is also made available on the Company's website <https://www.quesscorp.com/investor-other-information/>.

Kindly take the same on record.

Yours sincerely,
For Quess Corp Limited



Kundan K Lal
Company Secretary & Compliance Officer



Encl. a/a

Quess Corp Limited

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www.quesscorp.com



Winning Together

Investor Presentation

Q3FY22

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Company Overview



Leading domestic private sector **employer,**

with **~422,000 FTE**

Best ever quarter by **Revenue, EBITDA** and **PBT**



India's largest business services platform, driving productivity for customers

Front End Processes



Marketing Services*



In-store & Field Sales*



Omni channel CLM & Backoffice Services



Collections*



Installation & After Sales Services*



Industrial Operations & Maintenance



Staffing & Payroll



Compliance Tech & Services



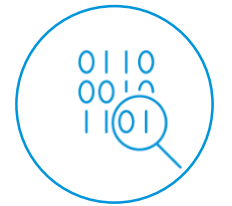
Facilities Maintenance



Manned & Electronics Security



F&A & HR Operations



Infrastructure & Digital IT Services

*Including gig-based workforce

We operate across 3 synergistic platforms

QUESS

Workforce Management

- **General staffing** across Retail, BFSI, Telecom, Industrial, etc., mostly grey collared talent
- Taskmo **on-demand task fulfilment** platform
- **Professional staffing services** in India & APAC
- **Training and skill development** for employability across 120+ training centres in India

Global Technology Solutions

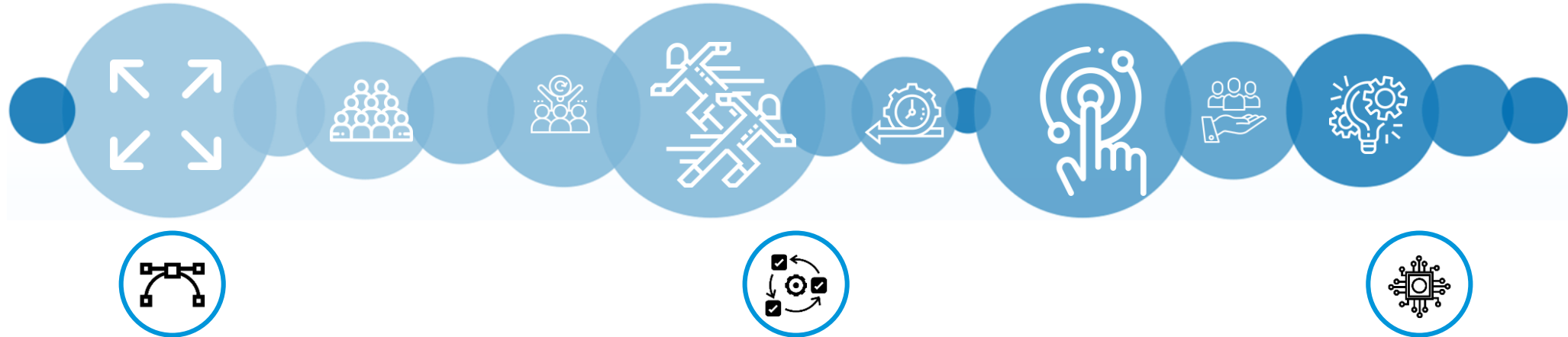
- **CLM solutions** (Voice and Non-voice) for Indian & North American customers, delivered from India and the Philippines
- **Non-Voice BPO:** Collections and F&A outsourcing for Indian customers
- **Platform business: Insurtech Platform** in North America **and Payroll** services to enterprises, mainly in India
- **IT services** in North America & India
- **Emerging Business**
 - MonsterIndia.com job portal
 - Digicare installation and after sales services
 - Qjobs blue collar hiring platform

Operating Asset Management

- **Facilities management solutions** (e.g., janitorial, F&B, landscaping, technical services, pest control) across India
- **Manned & electronic security** across India
- **Operations and maintenance services** across industrial segments such as Power, Metals, Cement, Telecoms, etc. and a renewed focus on manufacturing sector

We are the leading service provider in India in most of the services provided

Our customer proposition is unrivalled



Scale

- ~**422,000*** associates and employees deployed over **600+** cities
- International operations in **South East Asia, North America & the Middle East**
- **3,000+ clients, 65 offices** in **34 Indian cities**

Agility

- **An entrepreneurial** 14 year old startup
- **Widest repertoire of services**, including up-skilling platform
- We deliver tailor made solutions per **customer needs**, consistently
- Unrivalled capabilities to **Source, Screen and Select talent** (65mn+ database, tech-led hiring via MonsterIndia.com and QJobs)

Technology

- Significant **frontline productivity capabilities** (e.g., WorQ, Qjobs, Taskmo)
 - Digitised **hire-to-retain platform**
 - Leading **front-line productivity tools**

1

Digital Hire-to-Retire

Sourcing



Recruiting



Onboarding



Payrolling



Compliance

- **Digital sourcing** via auto-hiring engines, with digital pre-screening and assessment via [Qjobs](#) and [Monster](#)
- **End-to-end ATS ReQuit platform** from mandate creation, to candidate tagging and offer generation
- **Paperless on-boarding** of candidates within 14 minutes via [POP](#) (Paperless On-boarding Platform)
- **Flow-through payroll processing** and pay-slip generation on proprietary cloud-based **QPay** and **SmartPay** platforms
- **AI-driven RegTech engine, [Simpliance](#)**, to ensure compliance with Laws

2

Technology-led Frontline Productivity

Digital workflow management

- [WorQ WorkTech](#) platform to remotely assign & monitor tasks, driving frontline productivity

Digitally delivered skilling

- [WorQ](#) digital skilling modules to **efficiently train & continuously update** employees

Processes and tooling

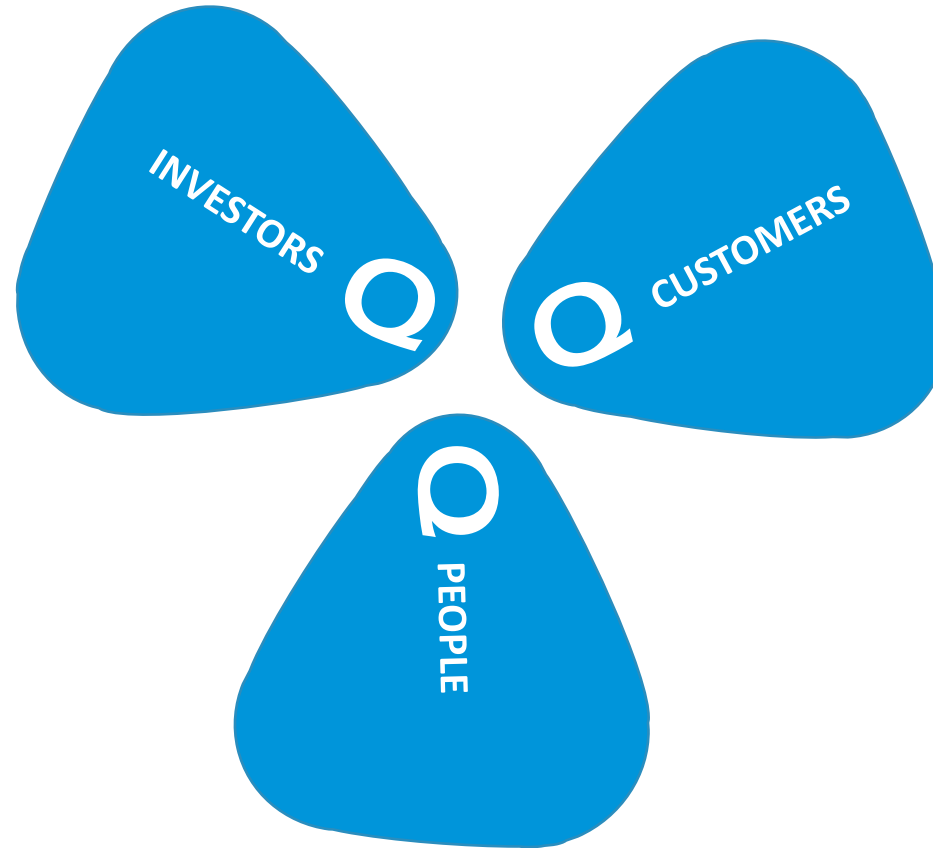
- **Superior tooling and SOPs** to drive productivity and improve dignity of labour

Ensuring flexibility and higher productivity

- [Taskmo](#), an on-demand task fulfilment platform to **manage seasonal demand through a distributed network of gig-workers** that ensures higher flexibility to customers at lower costs

Our focus is on **Winning Together** with our Customers, People and Investors

- Achieving and sustaining **20% RoE**
- Delivering **20% CAGR on OCF**
- Enhancing investor value through **judicious capital allocation**



- Leveraging **technology** to become **extensions** of our customers' operations
- **Innovating** our services to meet customer needs
- Helping our customers enjoy greater **productivity**, enhanced **flexibility** and lower **costs**

- Continuing to be a **Great Place To Work**
- Developing **leading practitioners** of our trade
- **Continuously learning**, to drive performance

Winning with Investors: The path to 20%

20% Return on Equity



20% Y-o-Y OCF growth



Sustained Growth

- 20% EBITDA CAGR through enhanced sales capabilities, cutting edge technology, and improved cross-sell capability
- Portfolio adjustments to turnaround or exit underperforming businesses



Higher EBITDA To PAT Conversion

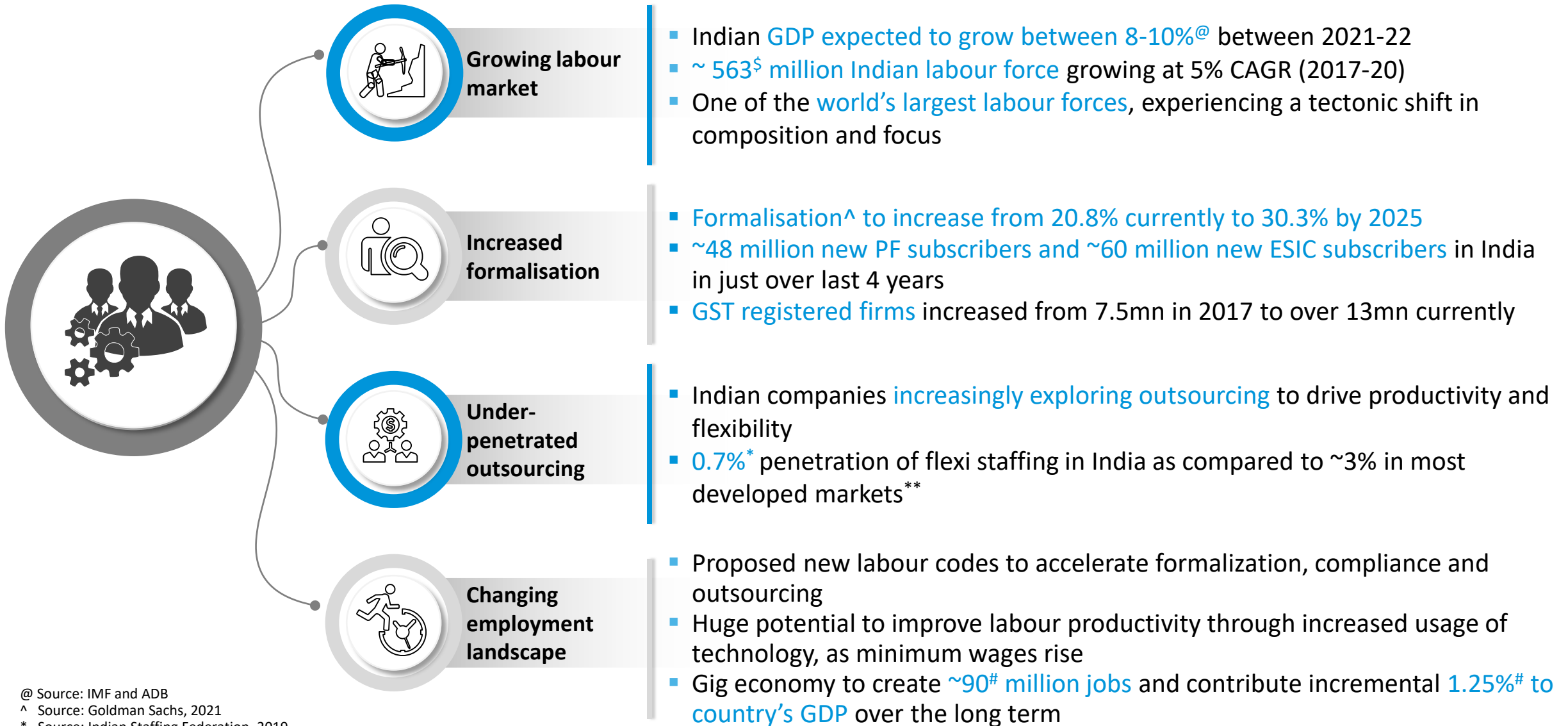
- Operating leverage through scale and technology intervention
- Prudent debt levels



Judicious Capital Allocation

- Capital allocation strategically aligned to 20% Return on Equity
- ~33% of FCF returned to shareholders over 3 years

We enjoy massive macroeconomic tailwinds



@ Source: IMF and ADB

^ Source: Goldman Sachs, 2021

* Source: Indian Staffing Federation, 2019

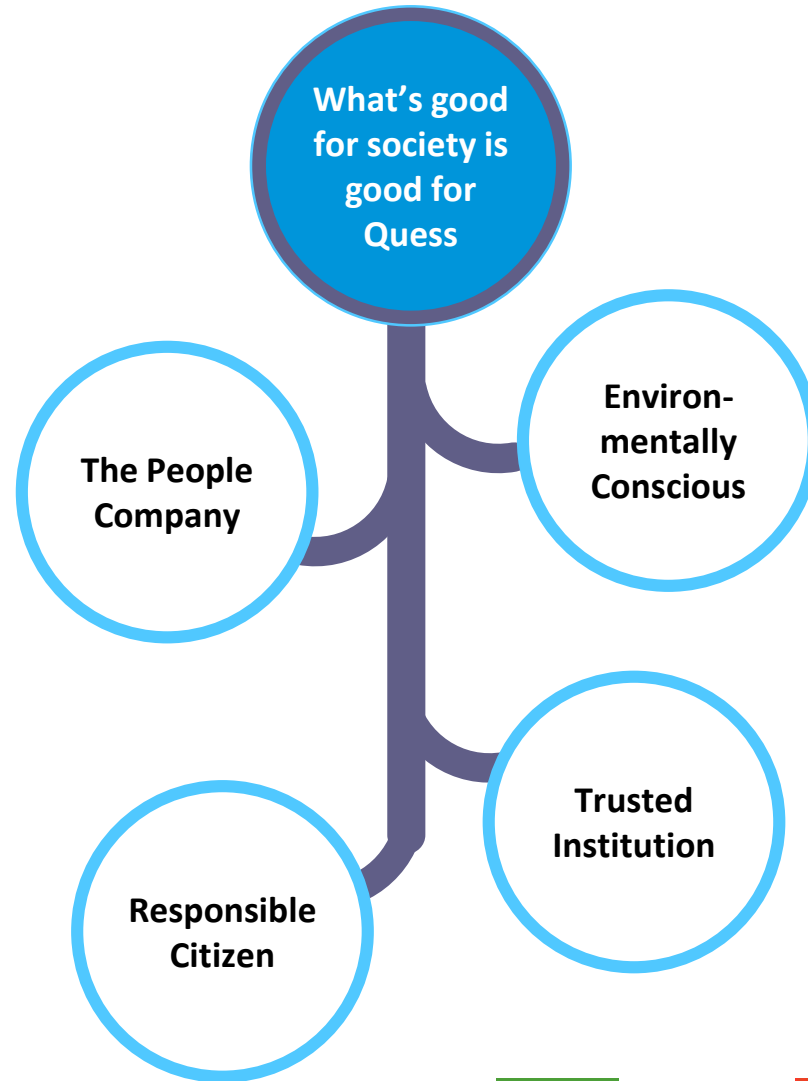
** Source: World Employment Confederation

Source: Boston Consulting Group, 2021

§ Economic Survey 2021-22

We have a clear ESG framework

- **>106,000 employees (30%)** hired in FY21 enjoyed first time social security benefits
- **~95,000 employees (~27%)** hired in FY21 were from outside Tier 1 and Tier 2 cities
- **~17% of our ~363K employees (~26% of core)** are women as on 31 March 2021
- Re-certified **Great Place to Work**
- **~132,000 employees** surveyed revealed Happiness score of **3.85 (on a scale of 4)**
- At the **frontline of the fight against COVID** - 57 hospitals, 3 airports and 11 infrastructure and public utilities maintained during COVID-19
- **Keeping India safe** through our network ~17,000 security professionals
- **~Rs. 2,900 crore of taxes and statutory contributions paid** in FY21, representing 26% of Revenue



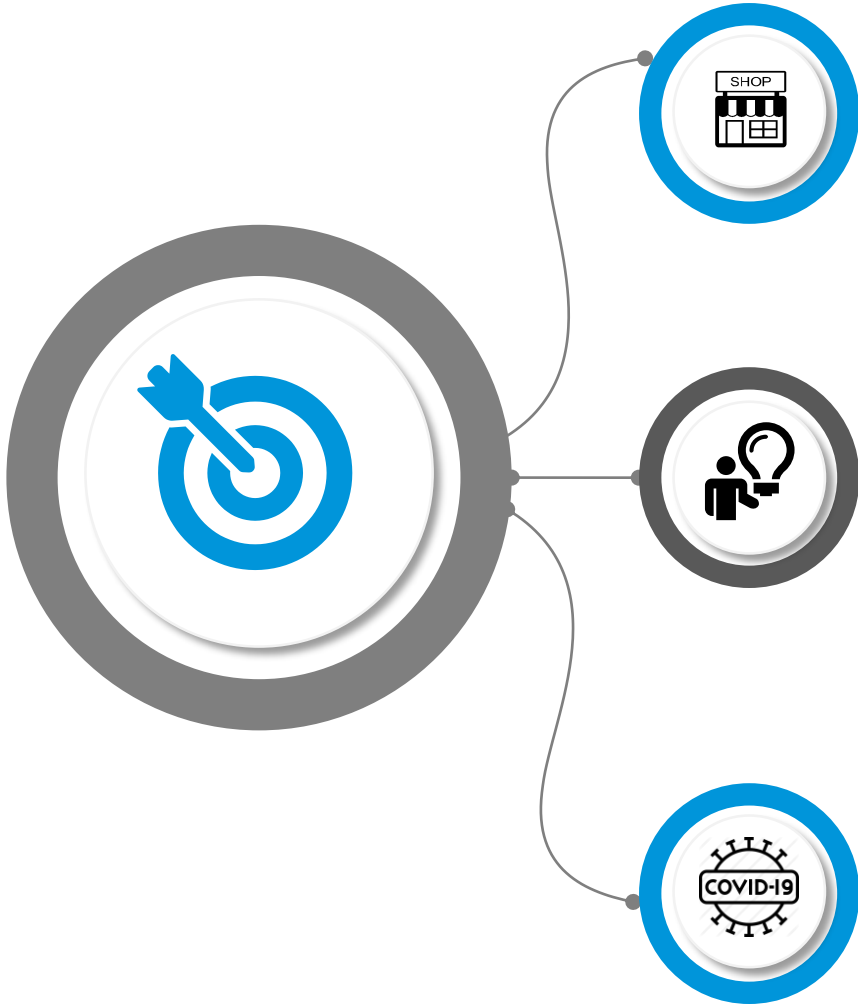
- **4.2 million sq. ft.** of green spaces maintained across India in FY21
- Business model drives **e-waste reduction** - ~900,000 devices repaired by QDigi in FY21
- **Responsible waste management**, including ~500 kgs of e-waste disposed responsibly and ~5,500 kgs of paper waste shredded and recycled in FY21
- **Values-driven** company, at the forefront of **driving responsible labour practices** in India
- **Industry-leading business processes, with robust culture** on Code of Conduct, Anti-Bribery & Corruption, Whistle Blower, etc.
- Qess Corp and our large subs (AllSec and Conneqt) are **ISO 27001:2013 certified**



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Key Corporate and Financial
Updates

Update on Q3 operating environment



■ Opportunity-rich hiring environment...

- Q3 saw cumulative GST collection of ₹ 3,91,000cr, an increase of 13% on QoQ basis
- The Monster Employment Index (MEI)* of hiring activity increased by 13% between Dec-20 and Dec-21
- Our Allsec payroll data shows over 15% increase in same-customer payslips processed in December this year on YoY basis, reflecting broad-based growth in employment amongst large enterprises across sectors.
- IT, BFSI, Manufacturing and Retail sectors have especially shown strong improvement in recruitment activity

■ ...punctuated by holiday season and furloughs

- Holiday season i.e. December month saw a pause in hiring, after intense hiring activity during the festive season
- IT Staffing saw a furlough of ~2% of total manpower for the month of December

■ Recovery in COVID impacted businesses paused by omicron wave

- Facilities management and security services recovered partially by focusing on non IT/ITES and Education sectors. However, outlook continues to be uncertain due to latest wave
- Training & Skill Development impacted as continuity of training batches was hampered by lockdowns
- Food business continued to be impacted from delays in work from office

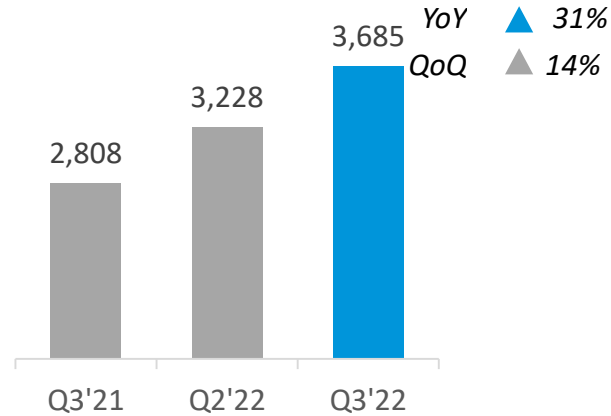
* <https://media.monsterindia.com/logos/mei/moin/Job-and-Hiring-Trends-in-India-December-2021.pdf>

Q3'22 Financial Highlights

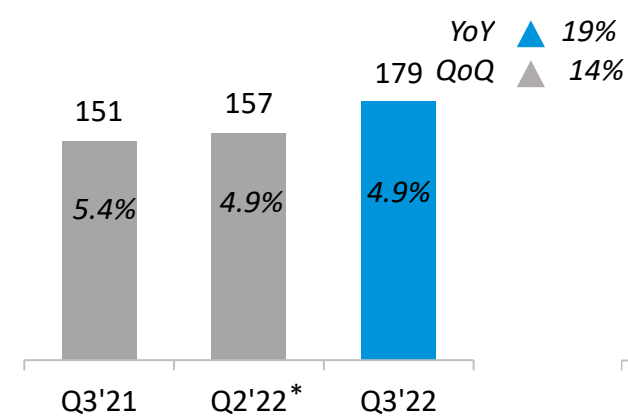
Revenue:

- Up 31% YoY driven by General Staffing (up 34%), IT Staffing (up 52%), and IFM (up 30%)
- Up 14% QoQ, given macroeconomic tailwinds and strong execution. General Staffing (up 15%) IT Staffing (up 19%), and IFM (up 14%)

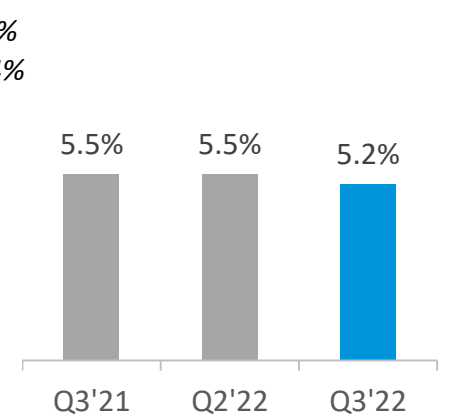
Revenue (in ₹ cr)



EBITDA (in ₹ cr) & margin (%)



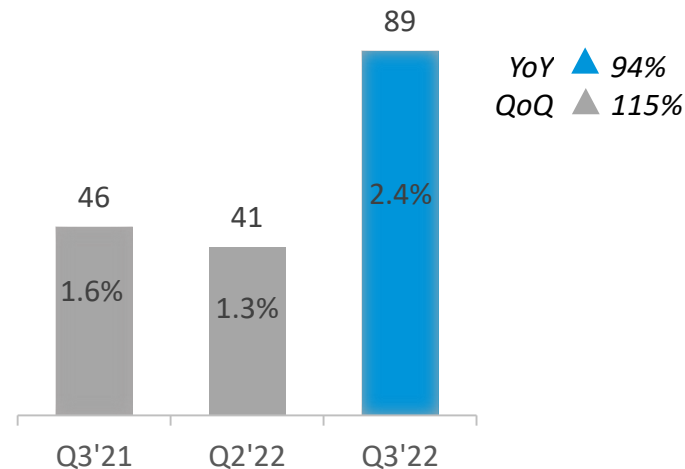
SG&A / Revenue



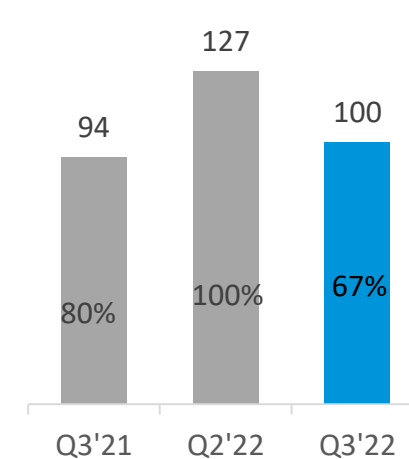
Profitability:

- EBITDA from operations up 19% YoY to ₹ 179cr, lower than revenue growth due to service mix change
- SG&A / Revenue decreased YoY from 5.5% to 5.2% due to operational efficiencies
- PAT up 94% YoY due to operating leverage

PAT (in ₹ cr) & margin (%)



OCF (in ₹ cr) & %



Cash Generation:

- Q3'22 OCF / Operating EBITDA conversion at 67%. 9M FY22 conversion is at 80%.
- DSO reduced by 3 days from Q2'22 to 55 days
- Net debt increased to ₹ 108cr in Q3'22 against ₹ 68cr in Q2'22, in line with revenue

* EBITDA from operations, excludes extraordinary ECL of ₹ 44 cr

Q3'22 Corporate Updates

- ▶ Recorded best ever quarter in terms of Revenue (₹ 3,685cr), EBITDA (₹ 179cr) and PBT(₹ 114cr)
- ▶ Increased equity stake in Taskmo from 36.58% to 49.00% against consideration of approximately ₹ 4cr
- ▶ Paid interim dividend of ₹ 4/- per share during Dec'21
- ▶ Monster raised ₹ 137.5cr at a valuation of ~ USD 100mn in Dec'21
- ▶ Quess re-affirmed as Great Place to Work with bettered and above-industry average score
- ▶ General Staffing business ranked 48 in top 50 of SIA's prestigious Largest Global Staffing Firms 2021 list
- ▶ In a recently conducted employee satisfaction survey, out of 110,000 respondents, 83% rated themselves Very Satisfied or Satisfied with Quess

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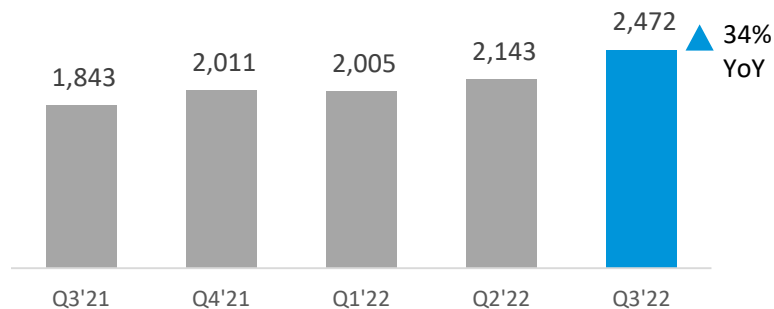
Platform-wise Updates



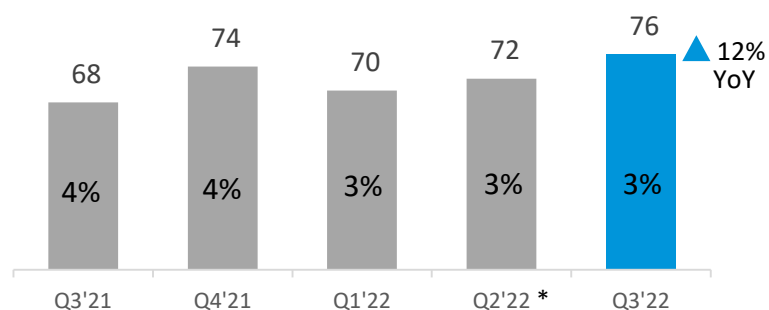
Workforce management – Performance Snapshot

Financial Metrics

Revenue (Rs Cr)

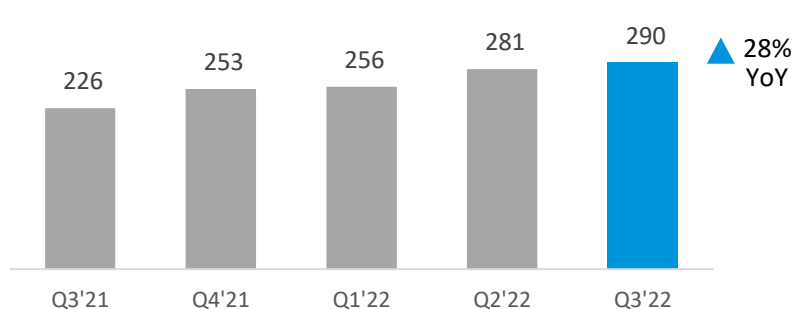


EBITDA from operations (Rs Cr)

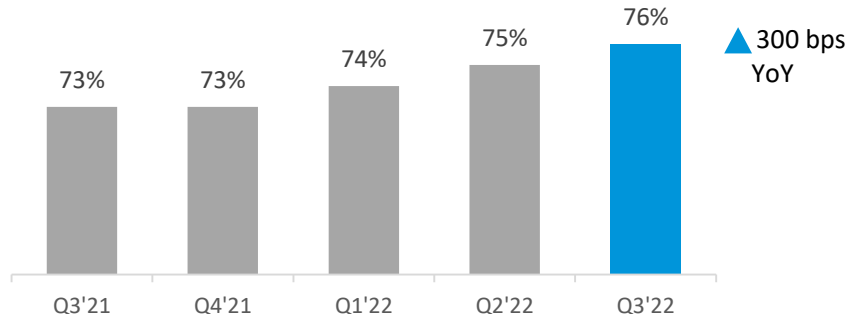


Operating Metrics

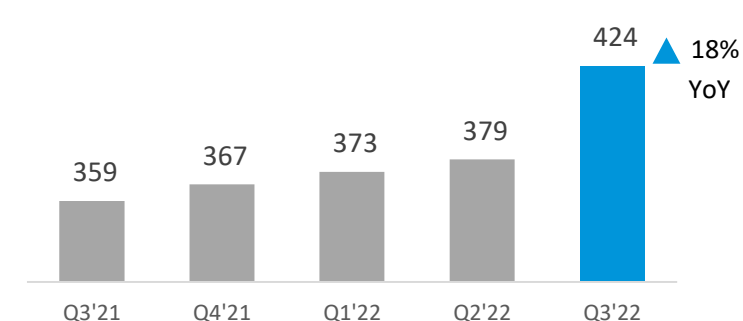
Associate Headcount# (in '000)



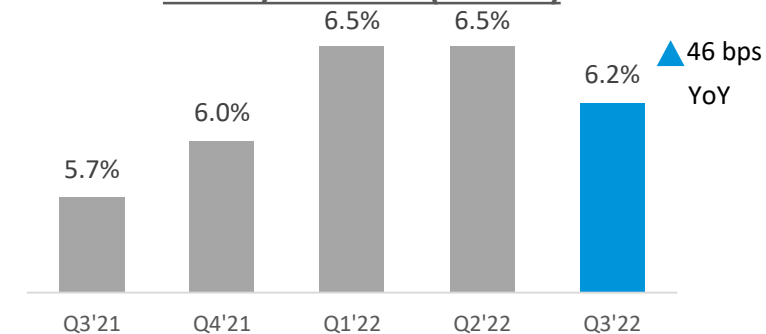
Collect & Pay - Headcount



Core:Associate FTE^(Gen Staff- 1:X)



SG&A / Revenue (IT Staff)



Key developments:-

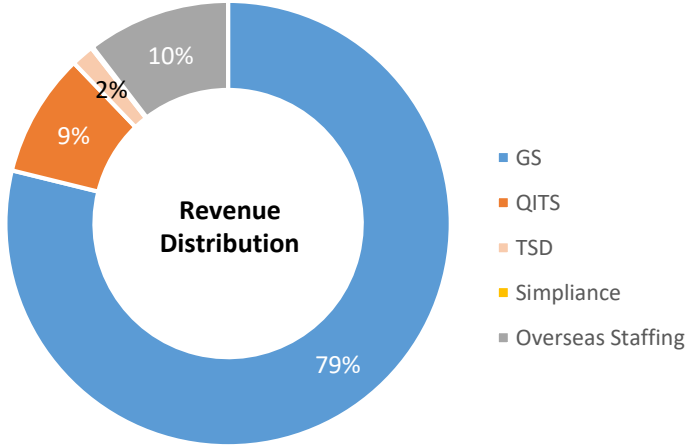
- **General Staffing** headcount crossed >270k. New customers accounted for ~50% incremental HC. Revenue up 34% YoY and 15% QoQ
- **IT Staffing** domestic headcount up by 7% QoQ with improved mix towards high margin. EBITDA up 53% YoY and 21% QoQ. Continued focus on high margin segments and strengthened delivery to drive profitability growth
- **Training & Skill Development** continued focus on running off legacy government projects, driving collections, and further optimising productivity. Difficult environment driving business volatility

Associate Headcount excludes over 13,934 employees processed in the quarter but no longer on rolls on 31st December *EBITDA from operations excludes extraordinary ECL of ₹ 33 cr (TSD)

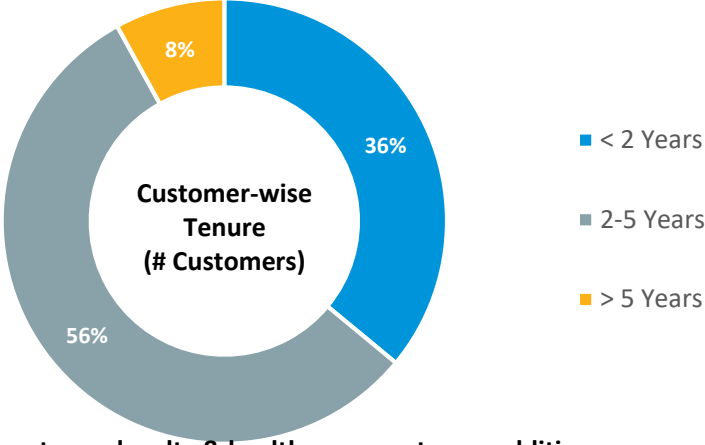
^ Core excludes Temps, Retainers and Interns

Workforce Management – Revenue Distribution and Customer Insights

Revenue Distribution

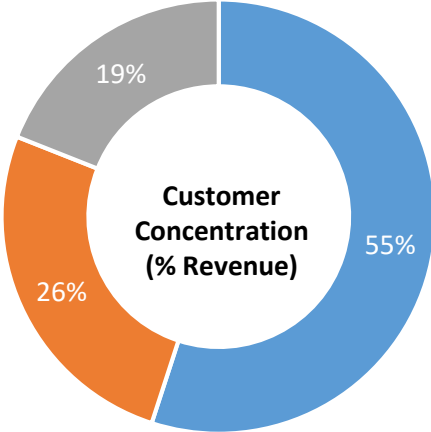


GS accounts for 79% of total revenue

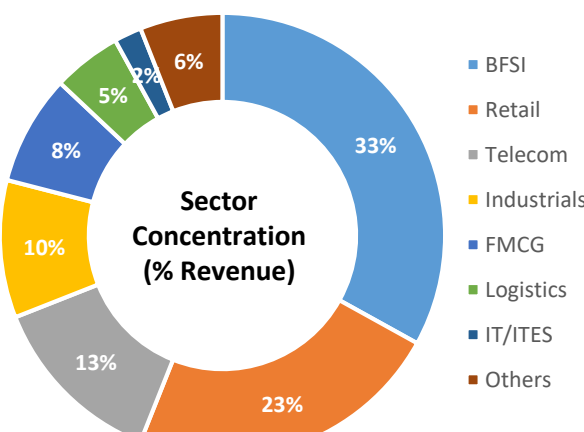


Good customer loyalty & healthy new customer addition:
> Half of Customers have tenure 2-5 years

Customer Insights (Gen. Staffing)

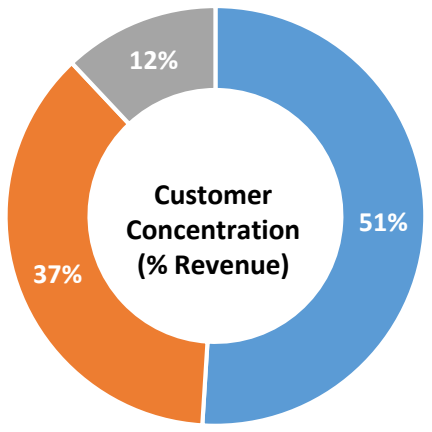


■ Top 10 ■ Next 40 ■ Others

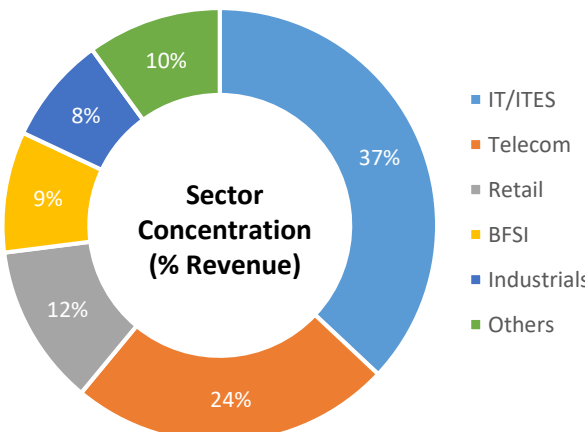


■ BFSI
■ Retail
■ Telecom
■ Industrials
■ FMCG
■ Logistics
■ IT/ITES
■ Others

Customer Insights (QITS)



■ Top 10 ■ Next 40 ■ Others

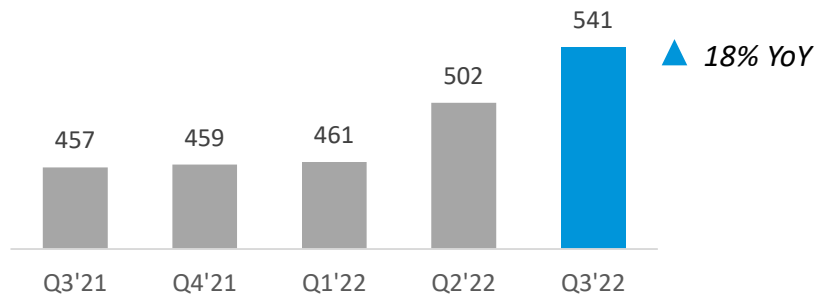


■ IT/ITES
■ Telecom
■ Retail
■ BFSI
■ Industrials
■ Others

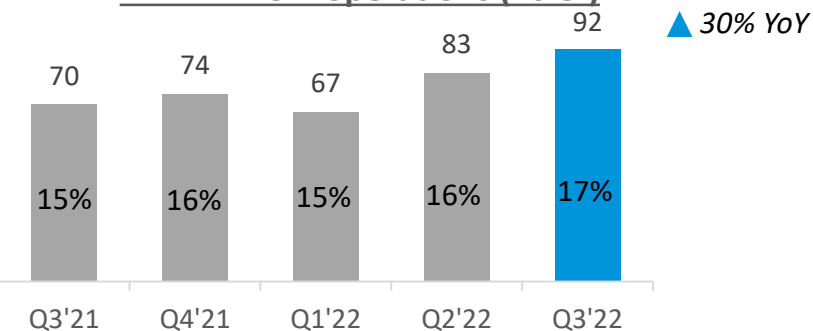
Global Technology Solutions – Performance Snapshot (excl. Emerging Businesses)

Financial Metrics

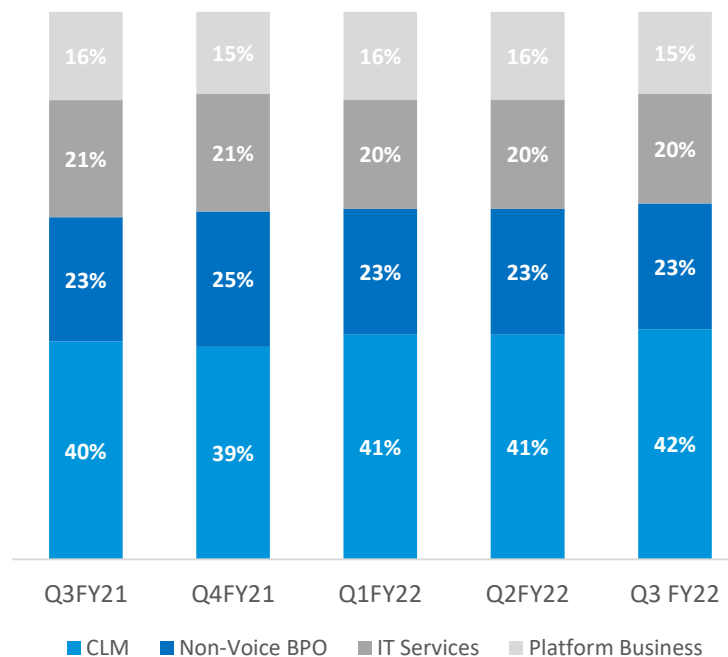
Revenue (Rs Cr)



EBITDA from operations (Rs Cr)

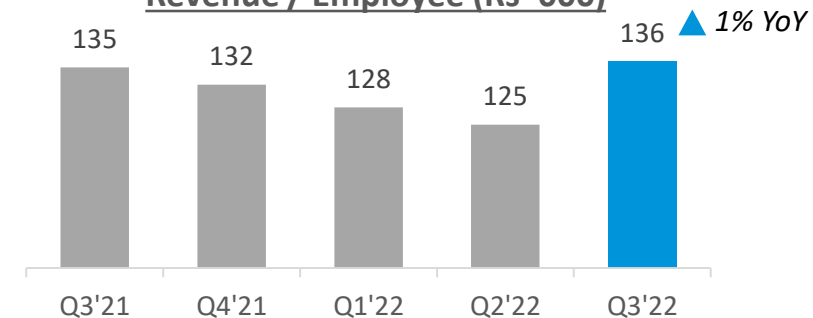


Revenue Distribution

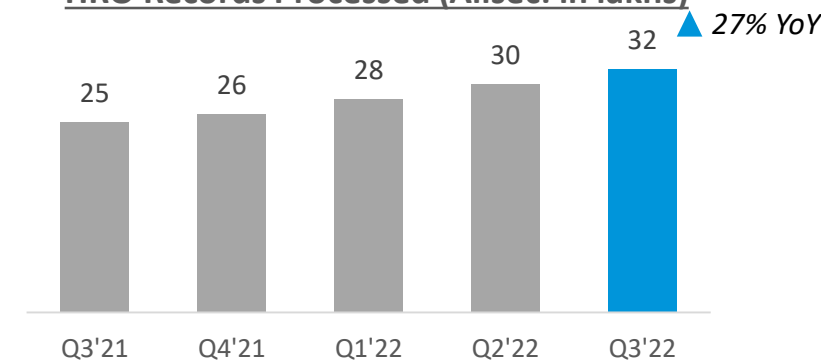


Operating Metrics

Revenue / Employee (Rs '000)



HRO Records Processed (Allsec: in lakhs)

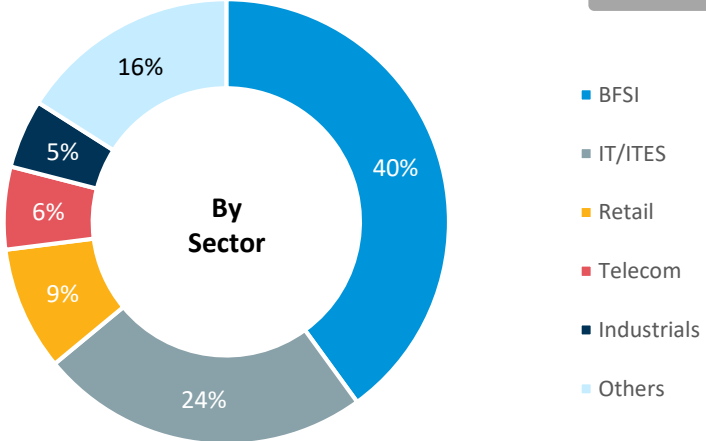


Key developments:

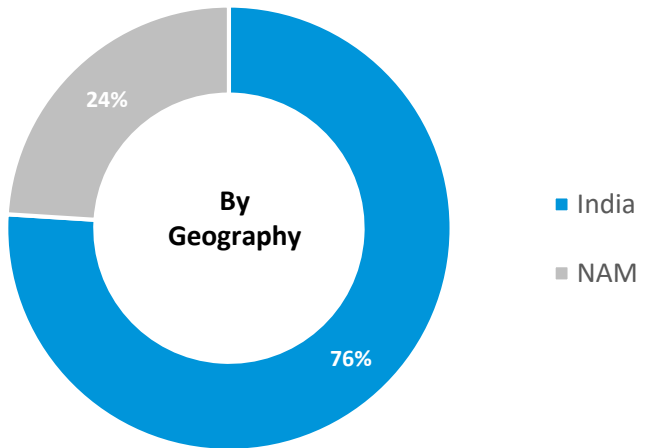
- **CLM:** Revenue up 26% YoY and 11% QoQ. Non-voice CLM grew by 57% YoY. New logo addition continue to be high with 24 logos added during the quarter
- **Non-CLM BPO:** Collection business revenue up 13% YoY as restrictions across country eased up. F&A business revenue up 17% YoY
- **Platform based services (InsurTech in US and HRO in India):** HRO platform payslips processed per quarter up 27% YoY, crossed 1 million payslips per month. US Insurtech revenues up 10% QoQ on the back of strengthened GTM
- **IT Services:** Domestic IT Services up 70% YoY and 19% QoQ, largely driven by wins in Infrastructure Management Services business

Global Technology Solutions– Revenue Distribution and Customer Insights (excl. Emerging Businesses)

Diversified Revenue Base

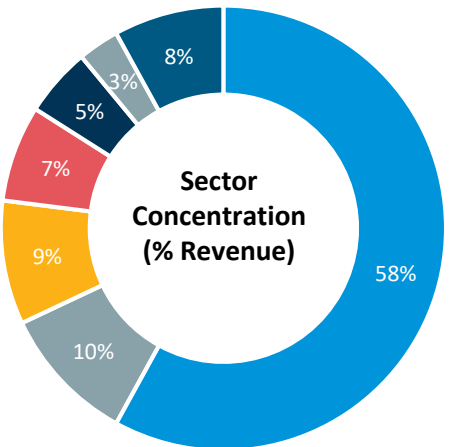
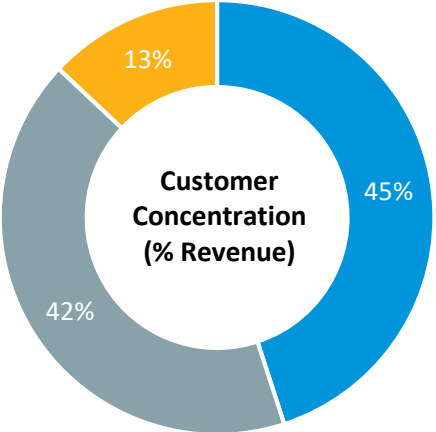


Revenue-base diversified across sectors



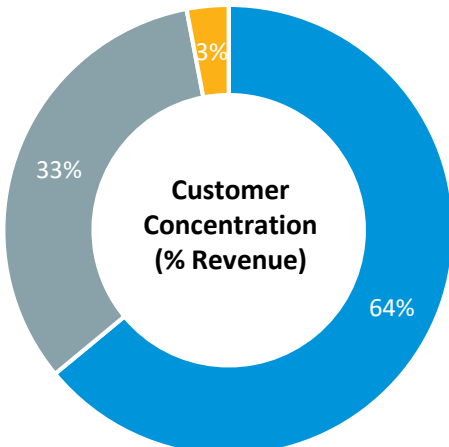
India is the main focus

Customer Insights (CLM and Non-voice BPO)

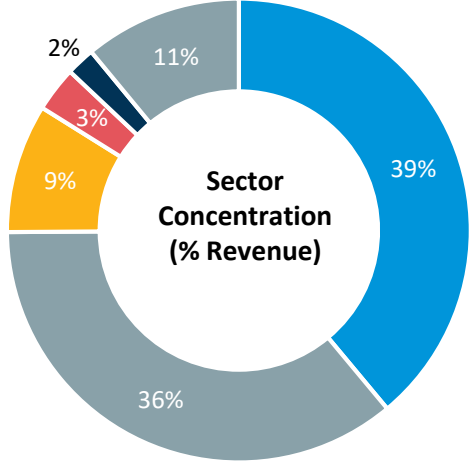


■ Top 10 ■ Next 40 ■ Others

Customer Insights (IT Services)



■ Top 10 ■ Next 40 ■ Others

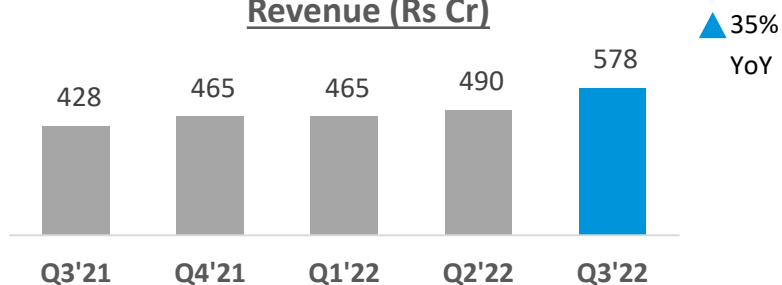


■ IT/ITES ■ Government ■ BFSI ■ Logistics ■ Retail ■ Others

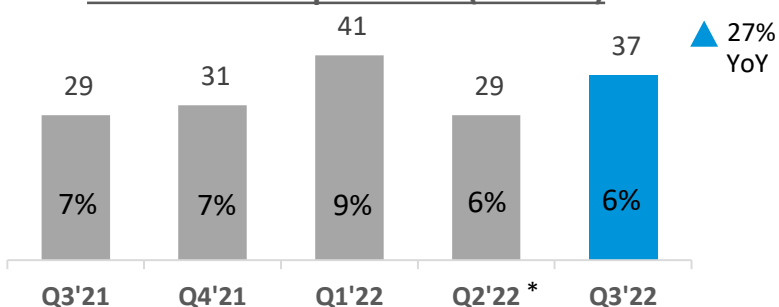
Operating Asset Management – Performance Snapshot

Financial Metrics

Revenue (Rs Cr)

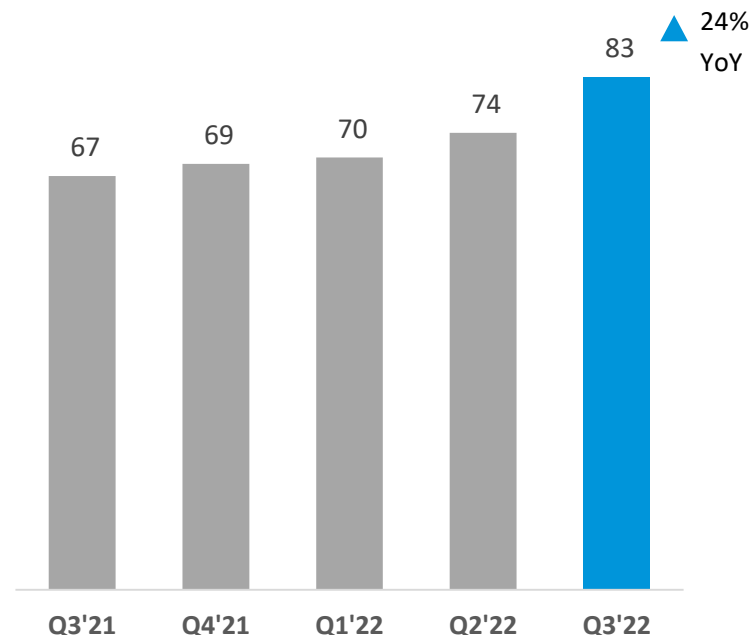


EBITDA from operations (in Rs Cr)

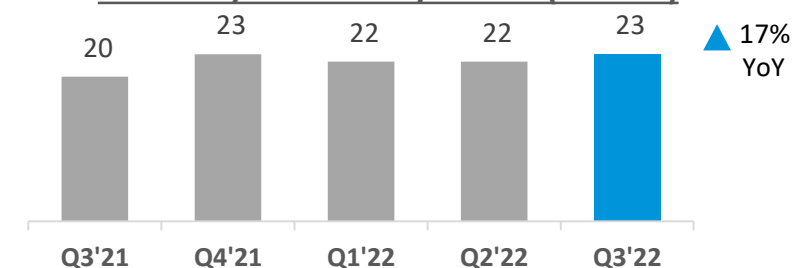


Operating Metrics

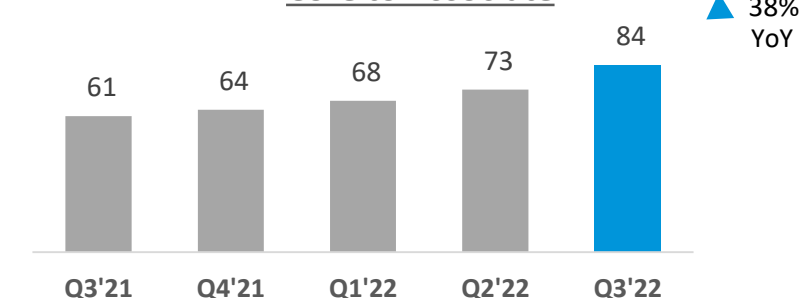
Associate Headcount ('000)



Revenue/Headcount/Month (Rs '000)



Core to Associate



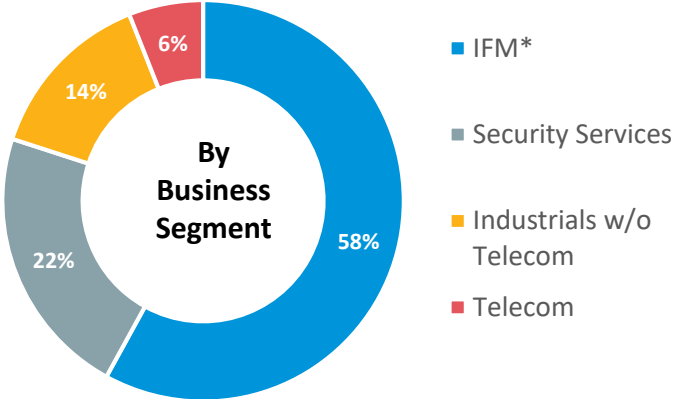
Key developments:

- **IFM:** Revenue up 30% YoY, with 22 client wins in the quarter. Margin improved by 80bps QoQ due to recovery in Food business.
- **Terrier Security:** Revenue up 19% on QoQ basis on the back of strong HC addition (up 13% QoQ), customer sales momentum remains strong with 38 new customers in the quarter
- **Industrial business:** Revenue up 15% on QoQ as contracts won during first half of the year got mobilized

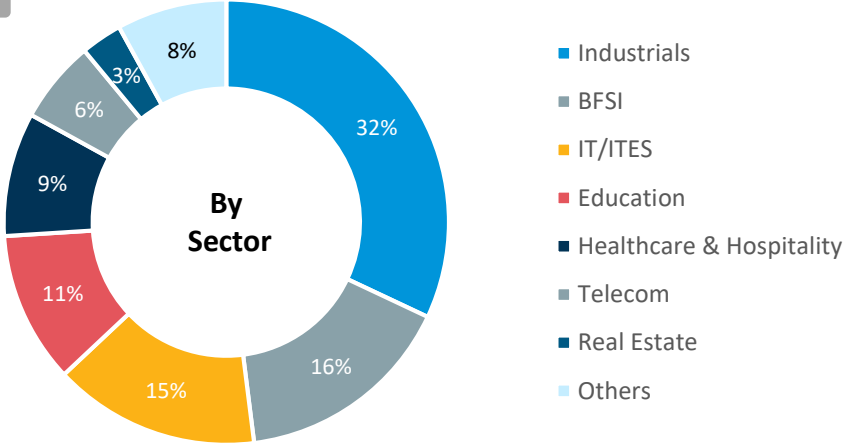
* EBITDA from operations excludes extraordinary ECL of ₹ 12 cr

Operating Asset Management – Revenue Distribution and Customer Insights

Revenue Distribution

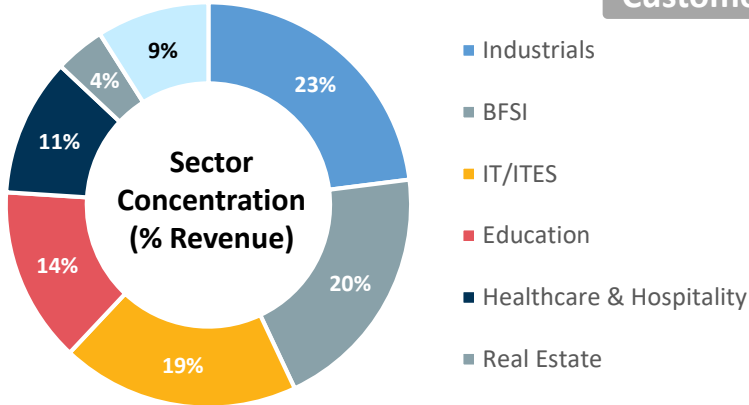


IFM* is the largest business segment

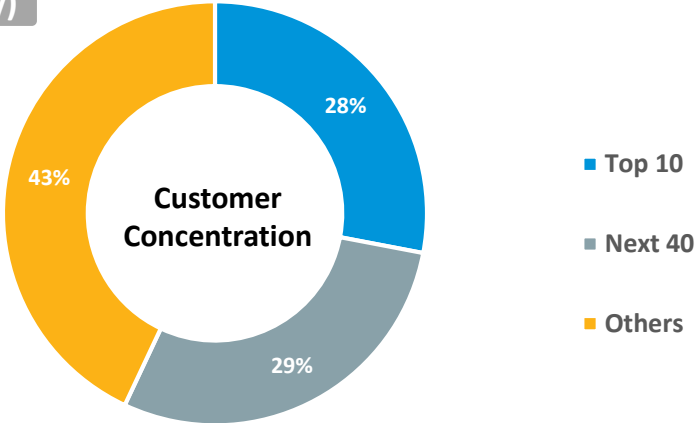


Revenue-base diversified across sectors

Customer Insights (IFM*+Security)



Diversified Customer Exposure:
Healthy distribution of contracts across customers



No Customer concentration risk
Top 10 customers account for 28% of revenue

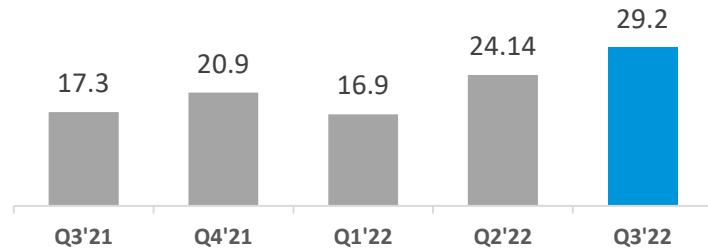
*Integrated Facility Management

Monster.com– Performance Snapshot

Financial Metrics

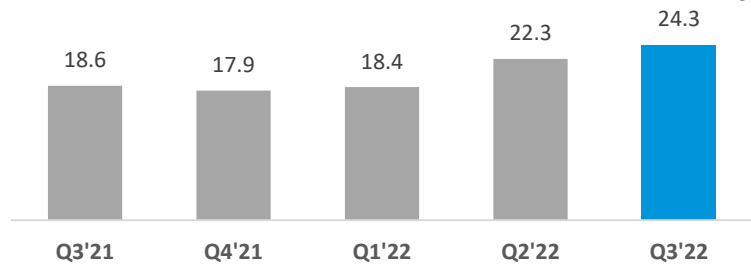
Sales (Rs Cr)

▲ 69%
YoY



Revenue (Rs Cr)

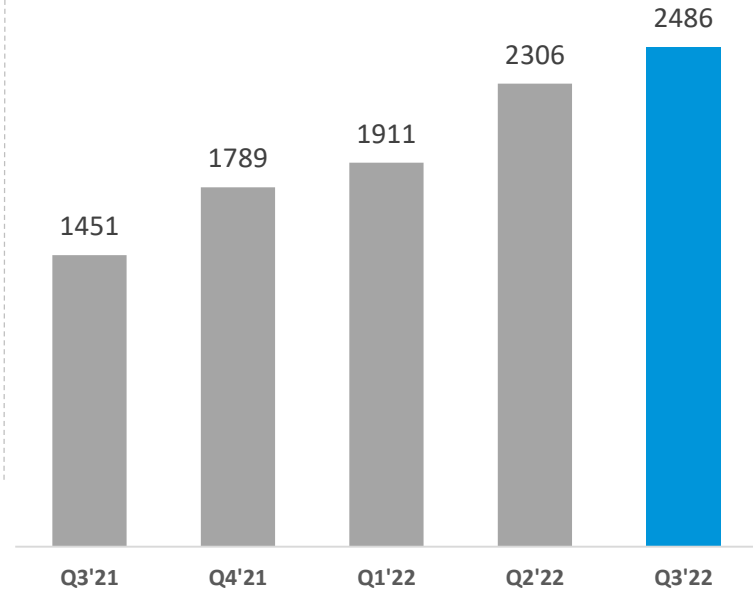
▲ 30%
YoY



Operating Metrics

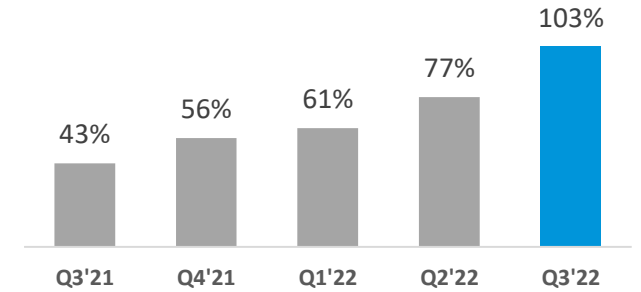
New Orders

▲ 71%
YoY



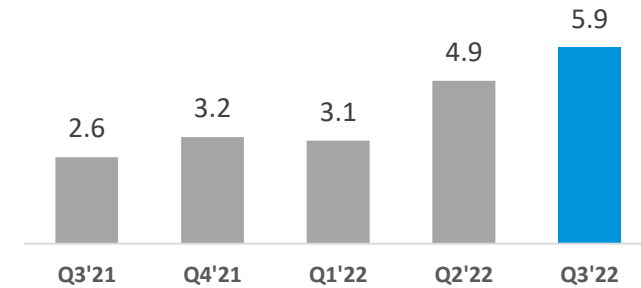
Top 1k Order Renewal Rate

▲ 140%
YoY



Recruiter Searches (in Mn)

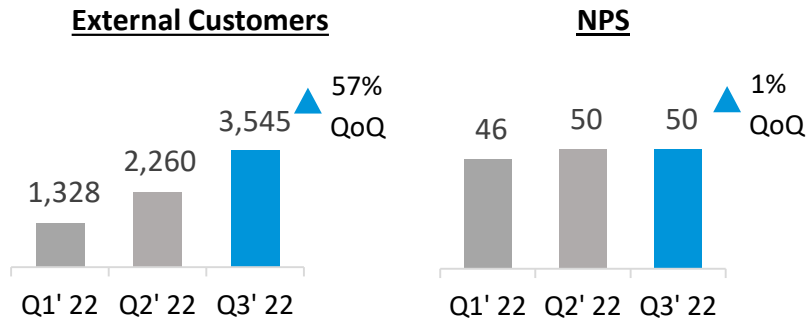
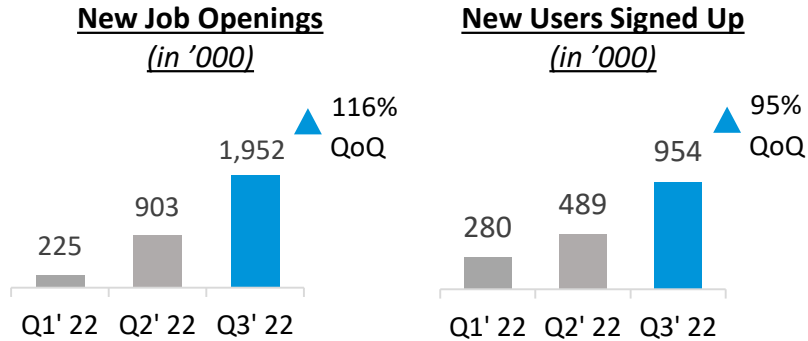
▲ 127%
YoY



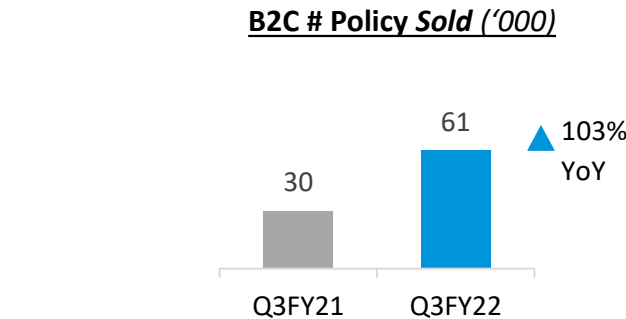
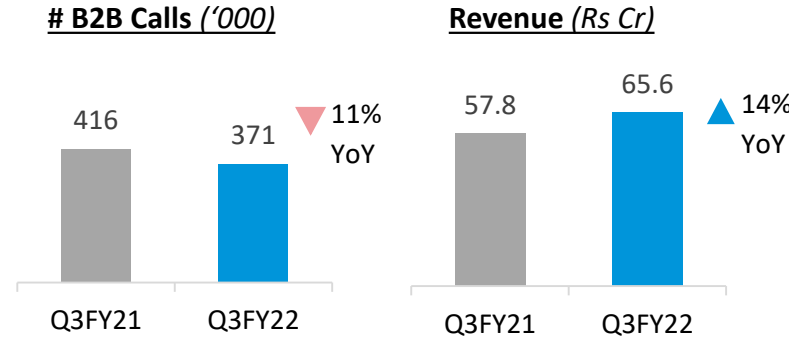
Key developments:

- **INR 137.5 Cr** investment raised, led by Volrado Venture Partners, Meridian Investments and Qess Corp
- **122% YoY** Growth in # of Active jobs on the platform. There is a large focus on Job Quality with a new metric of **Job Quality score** introduced
- Customer retention rate constant at **~70% QoQ** with focus on larger customers helping achieve **103% value renewals**
- User Acquisition & Re-activation crossed **1.5 million** in the quarter

Emerging Businesses Performance Snapshot



- Qjobs platform crossed **2 million+ candidates** and **1 million+ active job openings** at end of Q3 FY22
- 500K+ monthly recruiter-candidate interactions** being facilitated on Qjobs platform (118% growth Q-o-Q)
- 300K+ candidates' upskilling facilitated monthly** on Qjobs (109% growth Q-o-Q)



- Revenue increased by 14% despite reduced calls due to improvement in revenue per call
- Launched **55 New offerings in EW** for B2C customer & on-track to sell ~100 K policies for the year

Key Operational Metrics (Q3 FY22)

- 230K + Monthly Active Users & 100 K + DAU
- 6 L + shifts supervised thru digital supervisor reducing manual effort
- Dedicated sales & marketing team hired for external monetization
- Beta launch for SEA Market



Key Operational Metrics

- Expanded user base to 420 K with 150 K + MAU
- >12K monthly leads
- >5,000+ monthly units sold across Loans, Salary Advance, and Savings categories
- INR 53+ Cr GMV Annual Run Rate of benefits facilitated

“
Annexures

Income Statement

Particulars (in ₹ cr)	Q3 FY22	Q3 FY21	Q2 FY22	YoY	QoQ
Revenue from operations	3,685	2,808	3,228	31%	14%
Less:					
Employee benefit expense	(3,102)	(2,400)	(2,758)	29%	12%
Cost of material	(77)	(56)	(70)	37%	10%
Other expenses	(326)	(200)	(287)	63%	14%
Total expenses	(3,506)	(2,657)	(3,116)	32%	13%
Reported EBITDA	179	151	112	19%	60%
Extraordinary ECL charge	0	0	44	0%	-100%
EBITDA from Operations	179	151	157	0%	0%
Other income	3	10	7	-71%	-61%
Interest	(18)	(19)	(19)	-6%	-6%
Depreciation and amortisation	(41)	(40)	(43)	1%	-4%
Operating EBT	123	101	58	22%	113%
Intangible amortisation	(9)	(16)	(6)	-46%	43%
NCI Put Option Liability	(0)	(5)	(0)	-98%	5%
Share of Profit from Associates (net of tax)	(1)	0	(0)	-951%	34%
Profit before tax and Exceptional items	114	80	51	42%	123%
Exceptional items	-	-	(9)	100%	100%
Profit before tax	114	80	60	42%	91%
Tax	(25)	(35)	(19)	-26%	37%
Profit after tax	89	46	41	94%	115%
EBITDA margin	4.87%	5.37%	3.48%	-50 bps	139 bps
PAT margin	2.40%	1.62%	1.28%	78 bps	112 bps
Basic EPS	5.67	2.83	2.54	101%	123%
Diluted EPS	5.59	2.79	2.51	101%	123%

Balance Sheet

Particulars (in ₹ cr)	31-Dec-21	31-Mar-21	Var %
Non-current assets			
Fixed assets	389	431	-10%
Intangibles	1,172	1,104	6%
Investments	11	4	170%
Other non-current assets	625	591	6%
Current assets			
Trade receivables	1,242	894	39%
Unbilled revenue	992	905	10%
Cash and cash equivalents	627	614	2%
Loans & other current assets	177	175	1%
Total assets	5,235	4,720	11%
Equity			
Share capital	148	148	0%
Other equity	2,205	2,195	0%
Non controlling interest	76	94	-19%
Debt			
Long term debt	30	54	-45%
Short term debt	705	526	34%
Other liabilities			
Trade & other payables	132	121	8%
Other Financial Liabilities	1,188	1,037	15%
Other provisions & tax liabilities	752	545	38%
Total equities and liabilities	5,235	4,720	11%

Segment Reporting

Particulars (in ₹ cr)	Quarter Ended				
	Dec-21	Sep-21	Jun-21	Mar-21	Dec-20
Workforce Management Platform					
Revenue	2,472	2,143	2,005	2,011	1,843
Reported EBITDA	76	39	70	37	68
<i>Reported EBITDA %</i>	<i>3.09%</i>	<i>1.84%</i>	<i>3.47%</i>	<i>1.85%</i>	<i>3.70%</i>
EBITDA from operations		72		74	
<i>EBITDA from operations %</i>		<i>3.34%</i>		<i>3.66%</i>	
Global Technology Services Platform*					
Revenue	636	595	517	528	536
Reported EBITDA	94	85	59	74	74
<i>Reported EBITDA %</i>	<i>14.86%</i>	<i>14.22%</i>	<i>11.50%</i>	<i>13.95%</i>	<i>13.86%</i>
Operating Asset Management Platform					
Revenue	578	490	465	465	428
Reported EBITDA	37	17	41	-52	29
<i>Reported EBITDA %</i>	<i>6.37%</i>	<i>3.44%</i>	<i>8.76%</i>	<i>-11.26%</i>	<i>6.75%</i>
EBITDA from operations		29		31	
<i>EBITDA from operations %</i>		<i>5.83%</i>		<i>6.60%</i>	

* Includes Emerging Businesses



Winning Together
In your win lies our win

INVESTORS

CUSTOMERS

PEOPLE



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Qess Corp Limited (Qess) is India's leading business services provider, leveraging our extensive domain knowledge and future-ready digital platforms to drive client productivity through outsourced solutions.

We provide a host of technology enabled staffing and managed outsourcing services across processes such as sales & marketing, customer care, after sales service, back office operations, manufacturing operations, facilities and security management, HR & F&A operations, IT & mobility services, etc.

Our passion for delivering exceptional services, augmented by proprietary digital platforms, has strongly established our credentials as India's largest employer in the private sector and the biggest integrated business services provider in the country. We are proud to achieve this success as a 13- year old start-up.

A core value driving our business is constantly making the workforce more productive. Our business strategy is aligned to this, including training and skill development for better employability, helping job seekers easily find employment opportunities, digitising workflows, and providing social security benefits to a wider employable population.

Established in 2007 and headquartered in Bengaluru, Qess today has unmatched geographic presence and scale with more than 644 locations across India, South East Asia & North America, backed by technology-intensity and domain specialization to create unmatched service experiences.

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www.qesscorp.com



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