



Saksoft Limited

COMPANY BACKGROUND.....

- Saksoft is a global IT services company with recognized leadership in Information Management Solutions, Application Development and Testing Services.
- It was founded in 2000, today is a leading Digital Transformation Solution Partner for clients across the globe. The Company’s headquarters are located in Chennai (India) and has 16 offices across India, Europe, Asia and USA.
- Saksoft is a forward-looking digitalization partner for mid-sized global companies. It’s custom enabled Cloud Enterprise Applications and Omni Channel solutions allow businesses to access real-time information that it wants, when they want to, and where they want it.
- It’s expertise in Augmented Analytics solutions like Predictive, Prescriptive analytics using AI/ML, NLP, etc. help convert your data to a decision, personalize your marketing efforts and improve speed and accuracy through intelligent decision automation.

BUSINESS MIX (AS OF Q2 FY25).....

- Fintech (31%): Being a niche in Fintech space since 20+ years and delivering a range of applications and solutions, it’s able to leverage on its expertise to service better.
- Hitech,Media & Utilities (42%): With billions of data generated and consumed every second, telecom sector is bracing itself for huge data traffic and Saksoft has helped to create a value chain for their customers and opened up new avenues.
- Transportation & Logistics (16%): Dreamorbit of the Saksoft group provides next-gen technology based solutions to Logistics and Fin-Tech industry.
- Digital Commerce (11%): Saksoft’s retail solutions are fueled by our domain expertise combined with its retail experience in building end-to-end retail solutions that solve complex challenges. It supplements areas such as customer engagement, eCommerce, Sales & Marketing, Supply chain, and Pricing.

KEY STRENGTHS.....

- **Task Force:** Experienced and dedicated management team with a diversified board.
- The Company has lucrative **multiyear contracts** with well-known brands that guarantee revenue visibility.
- **Cross-selling and upselling** by the company aided in its development as a full-service provider.
- **Domain-specific solutions:** A trustworthy digital partner because of its extensive expertise of the numerous industries it offers digital solutions for.
- **Customer-fit:** Focus on clients with revenues ranging from USD 100 million to USD 3 billion- not too large to lose the customer perspective nor too little to be unable to spend appropriately.
- **Verticals specialization:** Concentration on a few verticals that are motivated by evolving lifestyle relevance and Comprehensive solutions
- **Consistent focus on digitalisation-driven** transformation along with Early entrant with a strong track record of successful digitalization driven projects and financial metrics

FINANCIAL PERFORMANCE.....

(INR Mn)	Operational Income	EBITDA	EBITDA%	PAT	PAT%	EPS
FY22	4,804	790	16.44%	633	13.18%	6.34
FY23	6,656	1,082	16.25%	820	12.32%	8.18
FY24	7,616	1,367	17.95%	962	12.63%	9.59
H1 FY25	4,163	718	17.25%	517	12.43%	4.08

Key Data

BSE Code	590051
NSE Code	SAKSOFT
Reuters	SAKS.NS
Bloomberg	SAK:IN

Market Data (INR) as on 30th September, 2024

Face Value	1.00
CMP	277.50
52 Week H/L	319.52/168.00
MCAP (Mn)	36,782.97
Shares O/S (Mn)	132.55
1 Yr Avg. Vol. ('000)	349.40

Performance as on 30th September, 2024

	3M	6M	12M
SAKSOFT	24.62%	33.46%	4.76%
SENSEX	6.65%	13.97%	28.09%
BSE SMALLCAP	9.02%	31.18%	51.58%

Shareholding Pattern as on 30th September, 2024

Promoters	66.64%
Public	25.84%
FPI	3.24%
Employee trust	4.28%

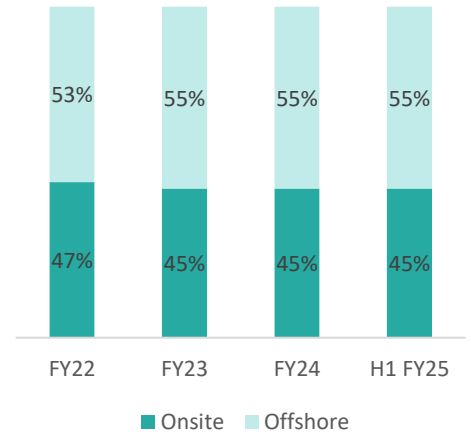
BUSINESS SEGMENTS.....

- **Fintech:** It's offerings include Mobile Cash Disbursement Solution, API Integration, Mobile/Web Development, Credit Scoring, Fraud prevention, etc. Increased internet penetration coupled with the growing popularity of digital payments & wallets is a key growth driver.
- **Telecommunication:** It provides Share Point Development, Advance Analytics to reduce customer churn, Oracle Support and Testing COE.
- **Transportation & Logistics:** It provides IoT solutions, Freight management software, Supply chain management, EDI integration, etc. It purchased MC Consulting, a Singapore-based company that specializes in offering technology-based business solutions, in February 2022.
- **Public Sector:** Offerings include Smart cities - Machine learning & facial recognition from IoT data feeds, Predictive Analytics & BI to provide better healthcare, etc. Acuma was acquired in 2006, it is an IM focused company focusing on the public sector.
- **Retail E-Commerce:** Offerings include social Listening (Micro Influencer), Customer 360, Customer Journey Tracking and ECommerce Portal Development. Solveda, a US based Digital Ecommerce solution company was acquired in August 2023.

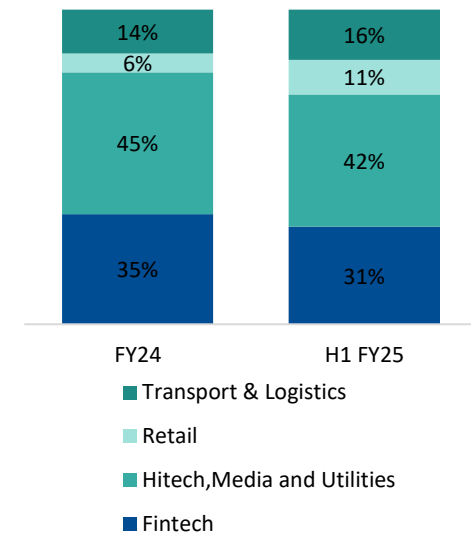
GROWTH DRIVERS.....

- **Inch-wide and Mile deep strategy:** It focuses on niche verticals and offerings by investing in digital assets and frameworks such as UNITE, STAQK, SAQAMA.
- **String of Pearls approach strategy:** Executed through timely and complementary acquisitions that widened our services. This strategy helps to increase its capability without much gestation period.
- **Value over Volume:** Address empty territories represented by more profitable projects and broad- base its operations.
- **Agility:** Continue its operations with a mid-tier corporation with few decision-making layers, which increases its agility.
- **Cost Leadership:** Saksoft has invested in the offshore delivery model, a validated cost effective approach.
- **Build Strong Team:** The company will seek to recruit creatively and aggressively to achieve its growth ambition.
- **Focus on Emerging Sectors:** Addressing the sweep of digitization to help clients enhance operational efficiency.

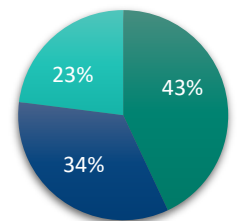
Revenue by Engagement Model (%)



Revenue by Verticals (%)



Revenue by Geography (%)



■ USA ■ APAC and Others ■ Europe

PEER COMPARISON (TRAILING 12 MONTHS) (INR MN)

Company	Operational Income	EBITDA	EBITDA%	Net Profit	PAT%	Market Cap
Saksoft Ltd.	8,040	1,382	17.2%	974	12.1%	36,783
Zensar Technologies Ltd.	50,299	8,078	16.1%	6,486	12.9%	1,53,108
Mphasis Ltd.	1,37,086	25,058	18.3%	15,946	11.6%	5,69,549
Persistent Systems Ltd.	1,07,231	18,321	17.1%	12,328	11.5%	8,49,694
LTI Mindtree Ltd.	3,64,850	64,260	17.6%	46,567	12.8%	18,49,165

INCOME STATEMENT (CONSOLIDATED)

PARTICULARS (INR MN)	FY22	FY23	FY24	H1 FY25
Operating Income	4,804	6,656	7,616	4,163
Expenses	4,014	5,574	6,249	3,445
Operating EBITDA	790	1,082	1,367	718
Operating EBITDA Margins (%)	16.44%	16.25%	17.95%	17.25%
Depreciation	69	100	119	62
Finance Cost	28	22	35	34
Other Income	111	94	69	67
PBT	804	1,054	1,282	689
Tax	171	234	320	171
Profit After Tax	633	820	962	517
PAT Margins (%)	13.18%	12.32%	12.63%	12.43%
Other Comprehensive Income	3	85	80	117
Total Comprehensive Income	636	905	1,042	635
EPS Basic (INR)	6.34	8.18	9.59	4.08

BALANCE SHEET (CONSOLIDATED)

PARTICULARS (INR MN)	FY23	FY24	H1-FY25	PARTICULARS (INR MN)	FY23	FY24	H1-FY25
EQUITIES & LIABILITIES				ASSETS			
Equity				Non-Current Assets			
(A) Equity Share Capital	100	101	128	(A) Property, Plant and Equipment	147	146	141
(B) Other Equity	3,945	4,953	5,538	(B) Right-of-Use Assets	128	149	133
Total Equity	4,045	5,054	5,666	(C) Goodwill on Consolidation	1,903	3,270	4,233
Non-Current Liabilities				(C) Other Intangible Assets	5	4	3
(A) Financial Liabilities				(D) Financial Assets			
(i) Borrowings	-	73	306	(i) Investments	-	-	-
(ii) Other Financial liabilities	41	302	297	(ii) Other Financial Assets	170	31	30
(iii) Lease liabilities	81	124	96	(E) Deferred Tax Assets (Net)	73	86	94
(B) Provisions	102	151	179	(F) Other Non-Current Assets	-	-	37
(C) Other Non-Current Liabilities	-	-	87	Total Non – Current Assets	2,426	3,686	4,671
Total Non – Current Liabilities	224	650	965	Current Assets			
Current Liabilities				(A) Financial Assets			
(A) Financial Liabilities				(i) Investments	90	145	128
(i) Borrowings	-	11	59	(ii) Trade Receivables	1,164	1,620	1,597
(ii) Trade Payables	257	359	241	(iii) Loans	2	17	1,195
(iii) Lease Liabilities	54	56	71	(iv) Cash & Cash Equivalents	879	1,418	554
(iv) Other Financial Liabilities	153	483	712	(v) Bank balances other than (ii) above	557	507	16
(B) Other Current Liabilities	858	1,157	1,013	(v) Other Financial Assets	249	178	322
(C) Provisions	90	94	99	(B) Current Tax Assets (Net)	33	40	89
Total Current Liabilities	1,412	2,160	2,195	(C) Other Current Assets	281	253	254
GRAND TOTAL - EQUITIES & LIABILITIES	5,681	7,864	8,826	Total Current Assets	3,255	4,178	4,155
				GRAND TOTAL – ASSETS	5,681	7,864	8,826

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