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allied digital services ltd

Q2 FY 2010 Earnings Presentation

- Consolidated Revenues of Rs 166.49 cr; up by 5% QoQ and 3% YoY
- EBITDA margins stands at 20.5% for the quarter reflecting a growth of 170 bps QoQ
- Net Profits for the quarter stand at Rs. 25.07 cr; up by 10% QoQ.
- Diluted EPS for the quarter stand at Rs. 13.82 with QoQ increase of 10%
- Healthy order book position with Rs. 110 cr from Solutions and Rs. 398 cr from the Services
- Revenues from En Pointe stood at USD 10.75 Million.
- The company raised Rs 231.42 cr by way of QIP placement by diluting 21.25% equity of the company.

Consolidated Financials

	Particulars	Q2 10	Q1 10	QoQ Growth (%)	Q2 09	YoY Growth (%)
Revenue	Net Revenue (INR CR)	166.49	158.76	4.9%	161.88	2.8%
	Total Revenue (INR CR)	166.67	158.96	4.9%	164.32	1.4%
Profit	EBITDA (INR CR)	34.09	29.89	14.1%	32.44	5.1%
	PBT(INR CR)	30.71	26.75	14.8%	30.01	2.3%
	PAT (INR CR)	25.07	22.76	10.1%	24.05	4.2%
Margin	EBITDA (%)	20.5	18.8		19.7	
	PAT (%)	15.4	14.5		15.4	
EPS	Basic (Rs.)	13.83	12.56	10.1%	13.85	-0.1%
	Diluted (Rs.)	13.82	12.56	10.0%	13.8	0.1%
Shareholding	Promoters (%)	55.59	55.72		63.66	
	Public (%)	44.41	44.28		36.34	

Revenue by Geography(Rs. cr.)	Q2 10	Q1 10	Q2 09
Domestic	104.5	102.7	104.4
International	62.0	56.0	57.5
Revenue by Service Offerings (%)			
Solutions	44	45	
Services	56	55	
Order Book Position (Rs. cr.)			
Solutions	110		
Services	398		

- Debtor days for the current quarter stands at 169 days on a standalone basis and 142 days on a consolidated basis as against 175 days and 149 days respectively for the last quarter.

- Companies moving towards the OPEX rather than CAPEX cycle
- Shift from T & M contracts to SLA driven contracts
- Industry is moving towards a services backbone rather than products
- Remote Infrastructure Management Services market alone projected to be a Rs. 4800bn market out of which only a little over 7% has been addressed *

*Source: Nasscom-Mckinsey Report08



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