

May 14, 2021

To

<b>BSE Limited</b> Department of Corporate Services Listing Department P J Towers, Dalal Street, Mumbai – 400001 <i>Scrip Code: 535648</i>	<b>National Stock Exchange of India Limited</b> Listing Department Exchange Plaza, Plot no. C/1, G Block, Bandra-Kurla Complex, Bandra (East), Mumbai – 400051 <i>Scrip Symbol: JUSTDIAL</i>	<b>Metropolitan Stock Exchange of India Limited</b> 4 <sup>th</sup> Floor, Vibgyor Towers, Plot No. C 62, G Block, Opp. Trident Hotel, Bandra Kurla Complex, Bandra (East), Mumbai – 400098 <i>Scrip Symbol: JUSTDIAL</i>
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Dear Sir/Madam,

**Sub.: Investor Presentation**

In accordance with Regulation 30 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find enclosed herewith a presentation to analysts / investors on the financial performance of the Company for Financial Results of the Company for the quarter and financial year ended March 31, 2021.

We request you to take the same on record.

Thanking You,

Yours truly,

**For Just Dial Limited**

**Manan Udani**  
**Company Secretary**

**Encl: as above**

**Just Dial Limited**

CIN: L74140MH1993PLC150054

Registered & Corporate Office : Palm Court Building M, 501/B, 5th Floor, New Link Road, Besides Goregaon Sports Complex, Malad West, Mumbai - 400064

Tel. : 022-28884060 / 66976666 • Fax : 022-28823789

Mumbai, Delhi, Kolkata, Chennai, Bangalore, Pune, Hyderabad, Ahmedabad, Coimbatore, Jaipur and Chandigarh

☎ 088888-88888 | [www.justdial.com](http://www.justdial.com)

# CORPORATE PRESENTATION

May 2021

**Justdial**<sup>®</sup>

India's No.1 local search engine

## DISCLAIMER

This Presentation has been prepared by Just Dial Limited ("Just Dial") for investors, shareholders, analysts and other relevant stakeholders, solely for informational purposes. The information set out in this Presentation, including business overview, traffic related numbers, products related information, historical financial performance and any forecasts should not be considered as advice or a recommendation to investors or potential investors in relation to holding, purchasing or selling securities or other financial products. Before acting on any information, you should consider the appropriateness of the information having regard to these matters, any relevant offer document and in particular, you should seek independent financial advice.

This presentation may contain forecasts/ forward looking statements based on facts, expectations, and/or past figures relating to the business, financial performance and results of the Company. As with all forward-looking statements, forecasts are connected with known and unknown risks, uncertainties and other factors that may cause the actual results to deviate significantly from the forecast. Readers are cautioned not to place undue reliance on these forward looking statements. Forecasts prepared by the third parties, or data or evaluations used by third parties and mentioned in this communication, may be inappropriate, incomplete, or falsified. Neither the Company or any of its subsidiaries or any of its Directors, officers or employees thereof, provide any assurance that the assumptions underlying such forward-looking statements are fully free from errors nor do any of them accept any responsibility for the future accuracy of the opinions expressed in the Presentation or the actual occurrence of the forecasted developments. Neither the Company nor its directors or officers assumes any obligation to update any forward - looking statements or to confirm these forward-looking statements to the Company's actual results.

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Any information provided in this presentation is subject to change without notice.

Q4 FY21 means the period Jan 1, 2021 to Mar 31, 2021

FY21 or FY 20-21 or FY 2021 means the Financial Year starting Apr 1, 2020 and ending Mar 31, 2021

## COVID-19 IMPACT & RESPONSE

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- ❑ Owing to second wave of COVID-19 being witnessed across the country, which is more virulent than the first wave witnessed in 2020, the Company has moved to Work-from-Home (WFH) for employees in line with respective State Government's directives. The Company has taken various measures to prioritize safety and well-being of its employees, and is closely monitoring the impact of the second wave.
- ❑ To optimize discretionary costs, Company had curtailed its advertising spends (both digital & non-digital) from Apr-20. During FY21, we spent Rs 6.8 Crores on advertising versus ~Rs 66 Crores spent in FY20. In FY21, bulk of traffic came organically (without advertising). For 4Q FY21 and FY21, we had 129.1 million (declined 7.1% YoY) and average 123.1 million (declined 19.7% YoY) quarterly unique visitors, respectively. Our advertising spends resumed/ accelerated from Mar-Apr 2021 in order to promote our newly launched B2B platform, JD Mart. Our IPL 2021 campaign has resulted in great branding and awareness about JD Mart among businesses
- ❑ With lockdown easing and impact of COVID-19 abating post the first wave, monetization had been on an improving trajectory. 4Q FY21 monetization stood at ~85% of pre-COVID levels. Due to reasonably healthy year-end Collections, deferred revenue stood at Rs 330.3 Crores as on 31 Mar 2021, down 1.7% YoY, up 8.2% QoQ.
- ❑ With acceleration of COVID-19 resulting in lockdowns/ restrictions across the country in the last 4-6 weeks, with obvious impact on SME businesses, Company is closely monitoring the impact of the same. In long term, Justdial's JD and JD Mart platforms are likely to be key beneficiaries of rising internet adoption among SMEs to take their business online to get customers and to also run their business efficiently via use of technology.



# BUSINESS OVERVIEW



# COMPANY OVERVIEW

Justdial's services connect sellers of products & services with potential buyers/ users



High user engagement, 117.8 million ratings & reviews



129.1 million quarterly unique visitors in Q4-FY21



Database of 30.4 million listings



Scalable and profitable business model



457,360 active paid campaigns



Figures as on Mar 31, 2021

## KEY STRENGTHS

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- ❑ First Mover Advantage in Indian Local Search Market
- ❑ Strong Brand Recognition with 129.1 million unique quarterly visitors^ in Q4 FY21 (132.6 million in Q3 FY21)
- ❑ Comprehensive database of 30.4 million listings
- ❑ Attractive Value Proposition For Local SMEs
- ❑ Experience and Expertise in Local Indian Market
- ❑ Advanced and Scalable Technology Platform
- ❑ Efficient & Profitable Business Model
- ❑ Strong & Experienced Management Team
- ❑ Strong Financial Profile, Prepaid Model

^ Unique visitors are aggregated across various mediums – Voice, Desktop/ PC, Mobile; these may not necessarily be mutually exclusive



# NATIONWIDE PRESENCE



Nationwide coverage, branches in 11 cities across India



Corporate Headquarters in Mumbai, Technology operations and R&D division in Bengaluru



3,464 employees in tele-sales, 4,829 feet-on-street salesforce



On-the-ground presence in 250+ cities pan India, covering 11,000+ pin codes




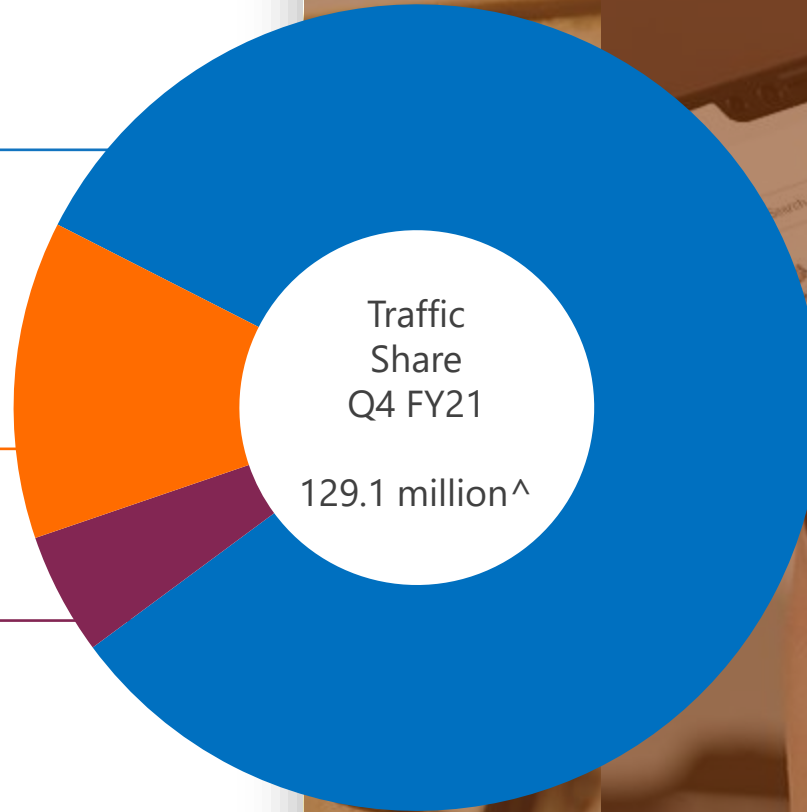


# PLATFORMS

 **82.4%**  
MOBILE  
Mobile Site & Apps

 **12.7%**  
DESKTOP/ PC  
[www.justdial.com](http://www.justdial.com)

 **4.9%**  
VOICE  
88888-88888



^ Unique visitors are aggregated across various mediums – Voice, Desktop/ PC, Mobile; these may not necessarily be mutually exclusive

# MOBILE

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Android & iOS Apps

Predictive Auto-Suggest

Company, Category, Product Search

Map View of Category Search

Location Detection

Voice Search

App Notifications

JD Pay

JD Social

Maps & directions

Location-based search service

Ratings & Reviews

Friends' Ratings

Favorites

Search Plus



# WEBSITE

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Predictive Auto-Suggest

Company, Category, Product Search

Location Detection

Maps & directions

Operating hours

Business logos

Pictures & videos

Ratings & reviews

Friends' Ratings

Favorites

Search Plus

Popular Category Searches



## VOICE

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 888888-888888

Operator-assisted Hotline Number

One number across India

24 Hours a day x 7 Days a week

Multi-lingual support

Zero-ring Pickup

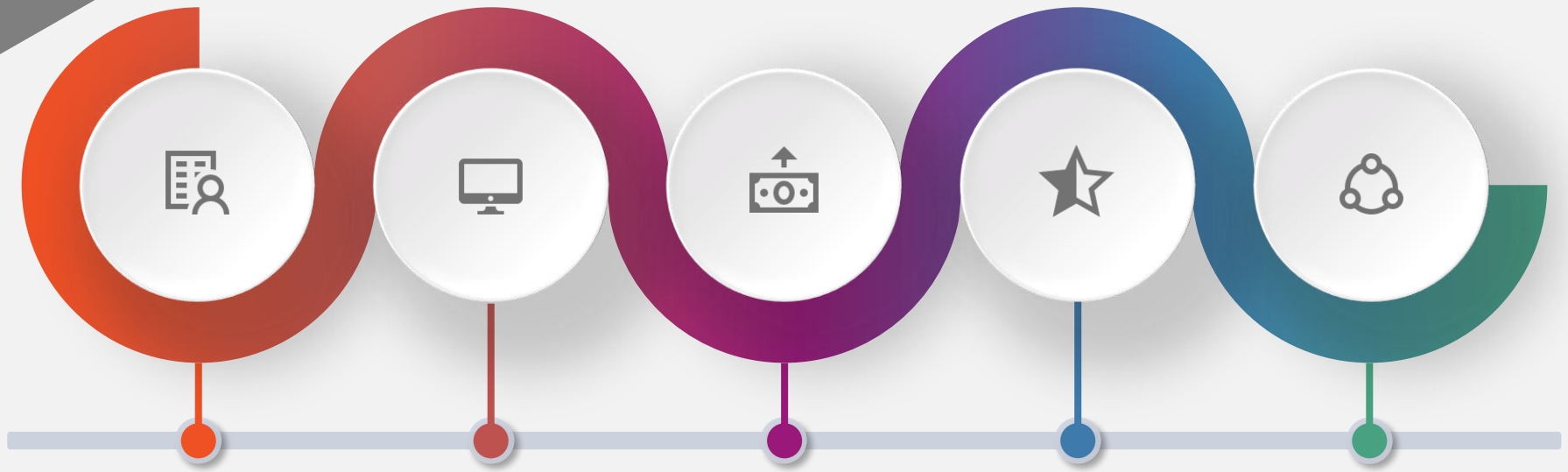
Personalized Greeting

Multiple queries in one call

Instant Email & SMS



# VALUE PROPOSITION FOR SMEs



## LISTING

Every SME should be listed on Justdial - India's leading local search engine & online marketplace

## OWN WEBSITE

Justdial can create websites for SMEs instantly, which are mobile-ready, dynamic & have transactional capabilities

## PAYMENTS

SMEs can accept digital payments from their customers - via JD Pay, an online payment mechanism

## RATINGS

Ratings are key to users' decision-making, JD Ratings tool helps SMEs gather more ratings & reviews

## REACH

JD Social, a social media platform with curated content, provides great visibility to businesses rated by users

# USER ENGAGEMENT



117.8 million Ratings & Reviews

Mobile-verified, unbiased ratings

Friends' Ratings

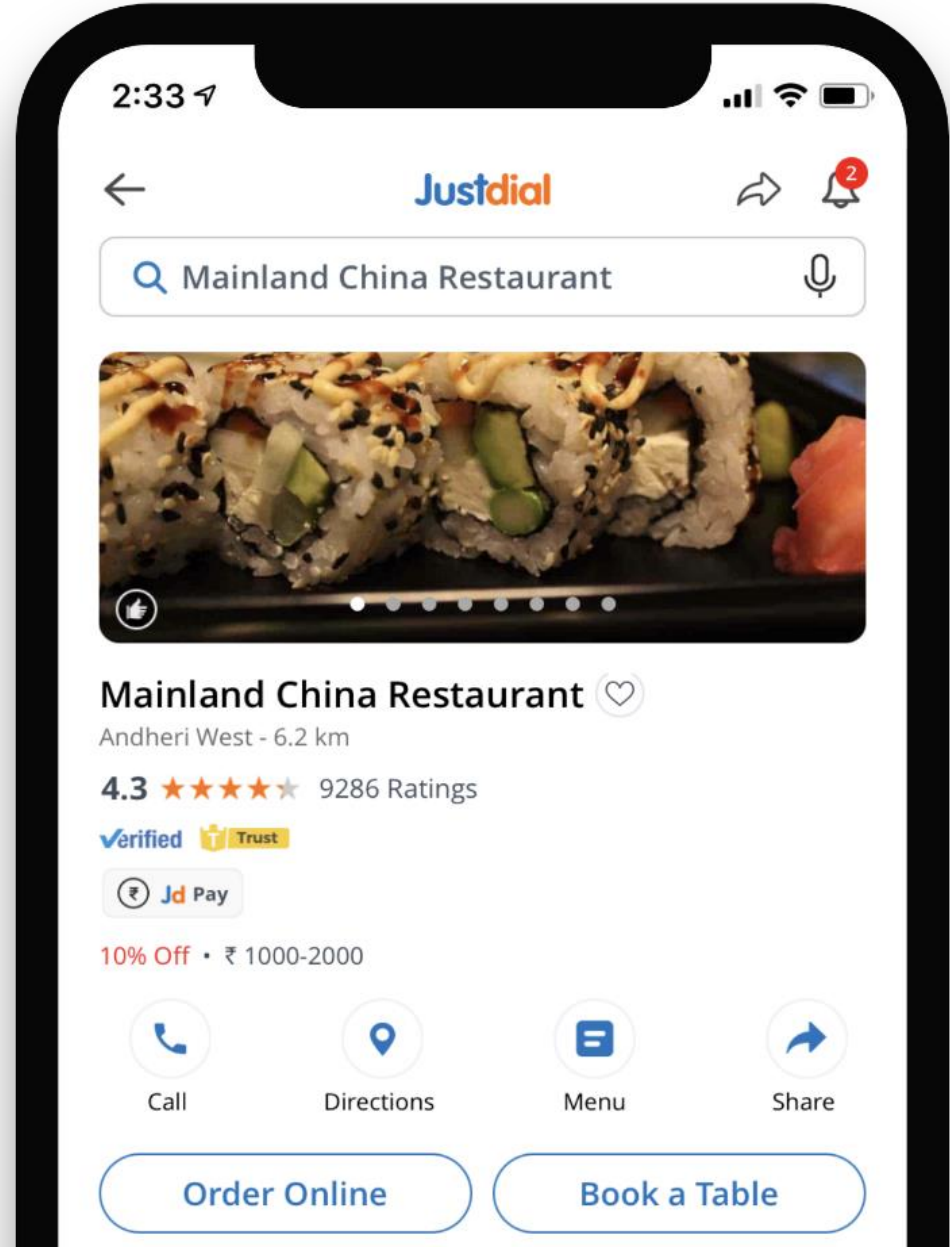
10-Point Rating Scale

Facebook & Twitter-shareable

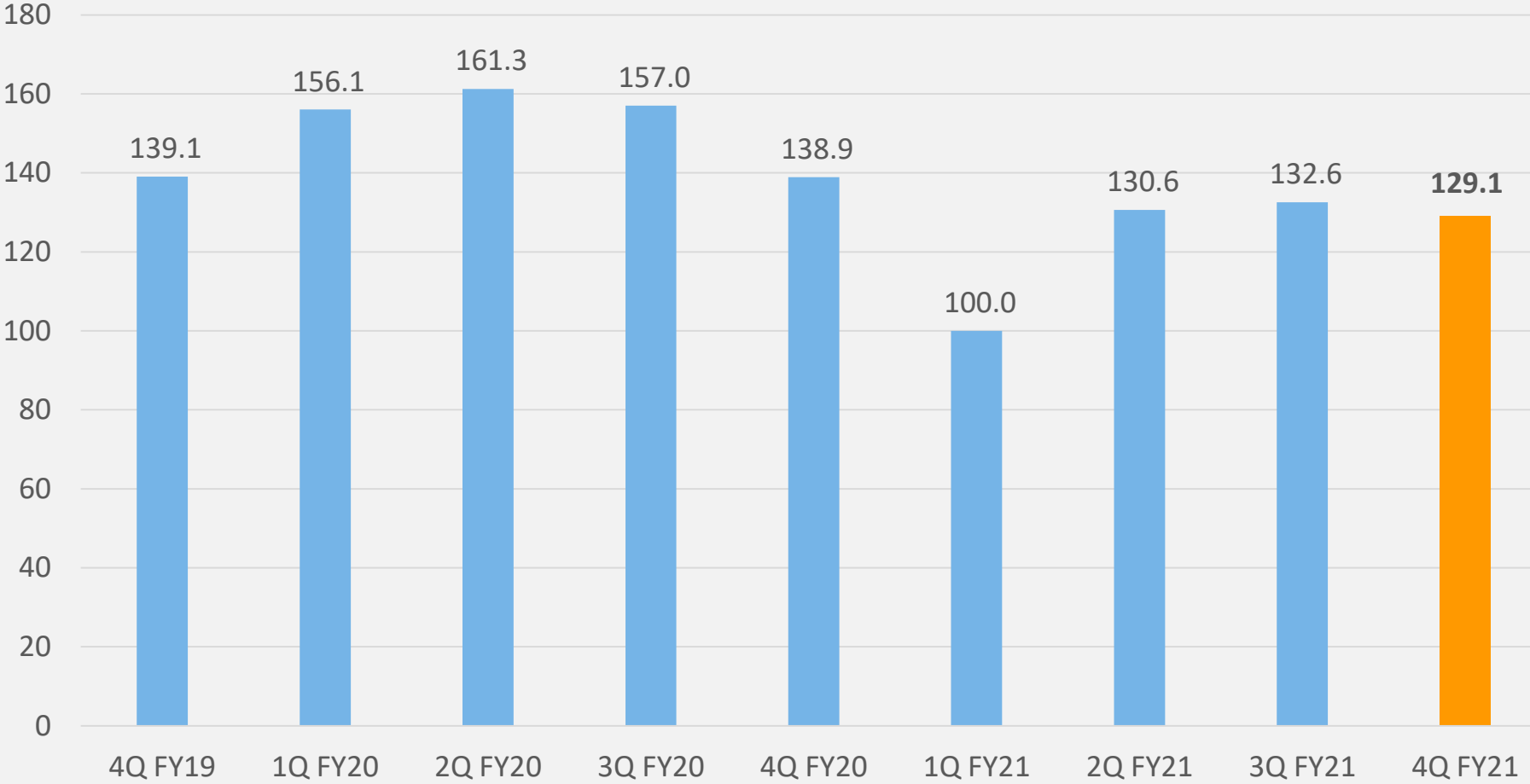
Photos Upload with Review

Ratings shared on JD Social

Robust Audit Mechanism

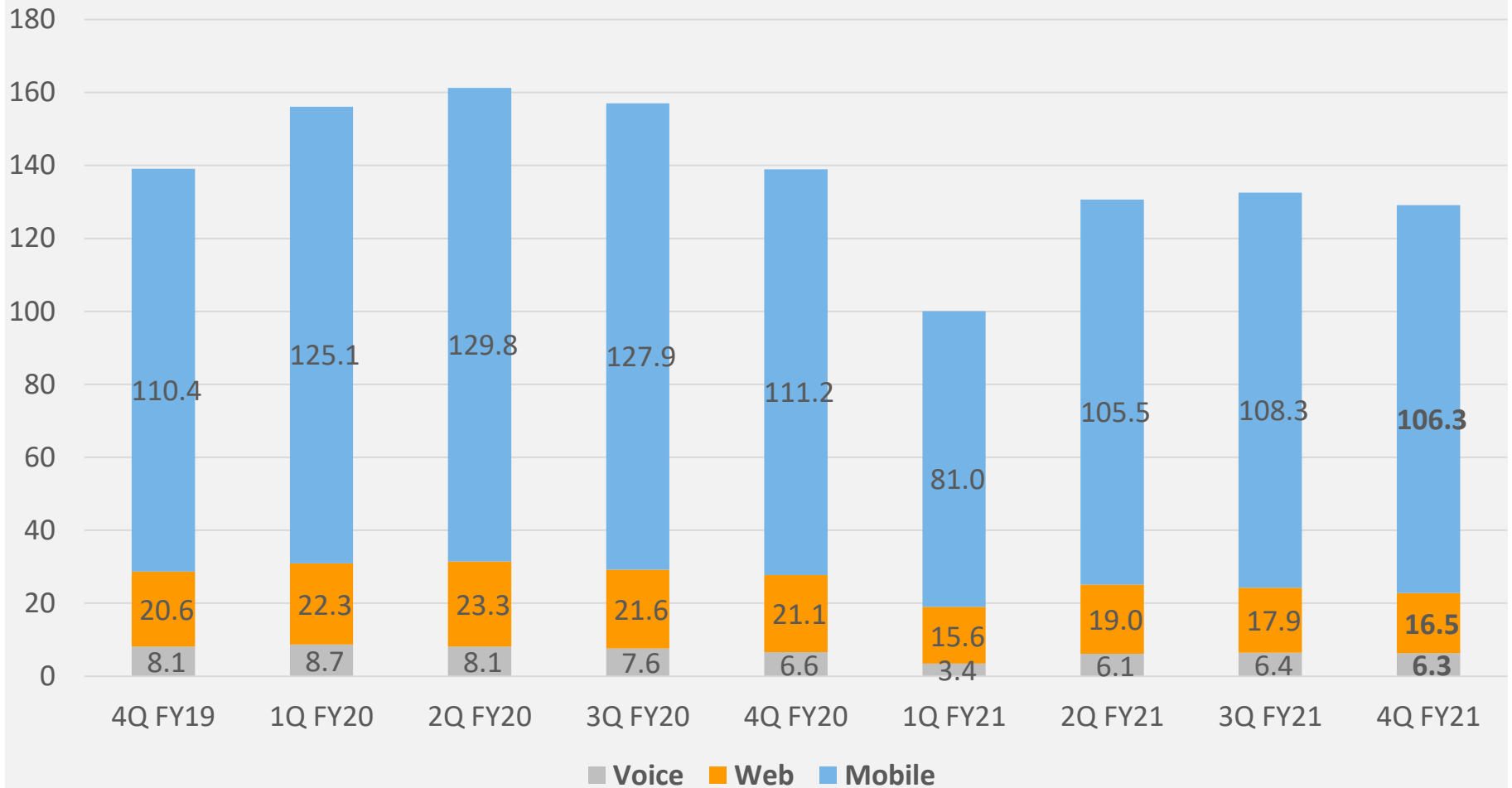


Quarterly Unique Visitors (million)



# TRAFFIC / VISITORS

## Quarterly Unique Visitors split (million)

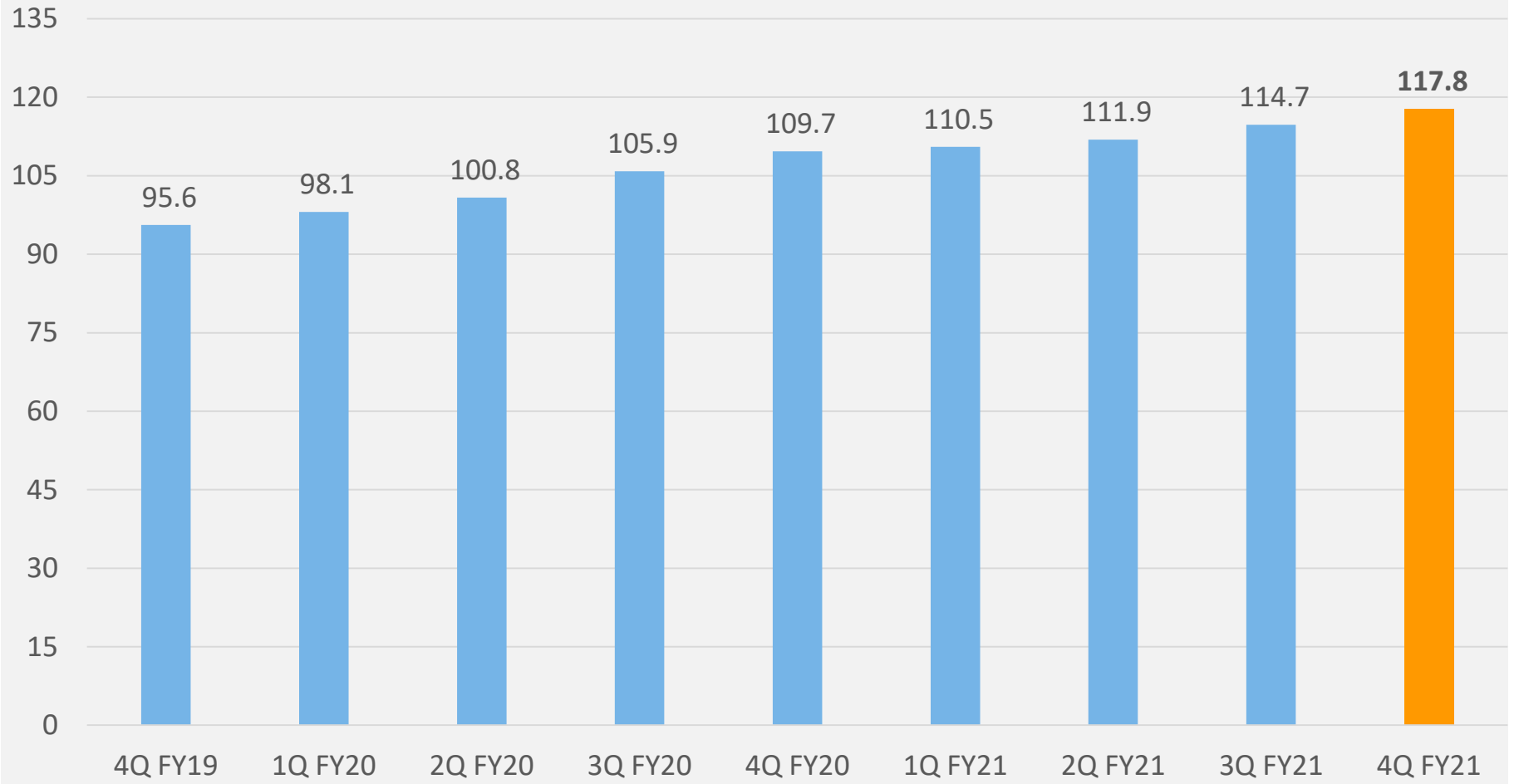


Unique visitors are aggregated across various mediums – Voice, Desktop/ PC, Mobile; these may not necessarily be mutually exclusive



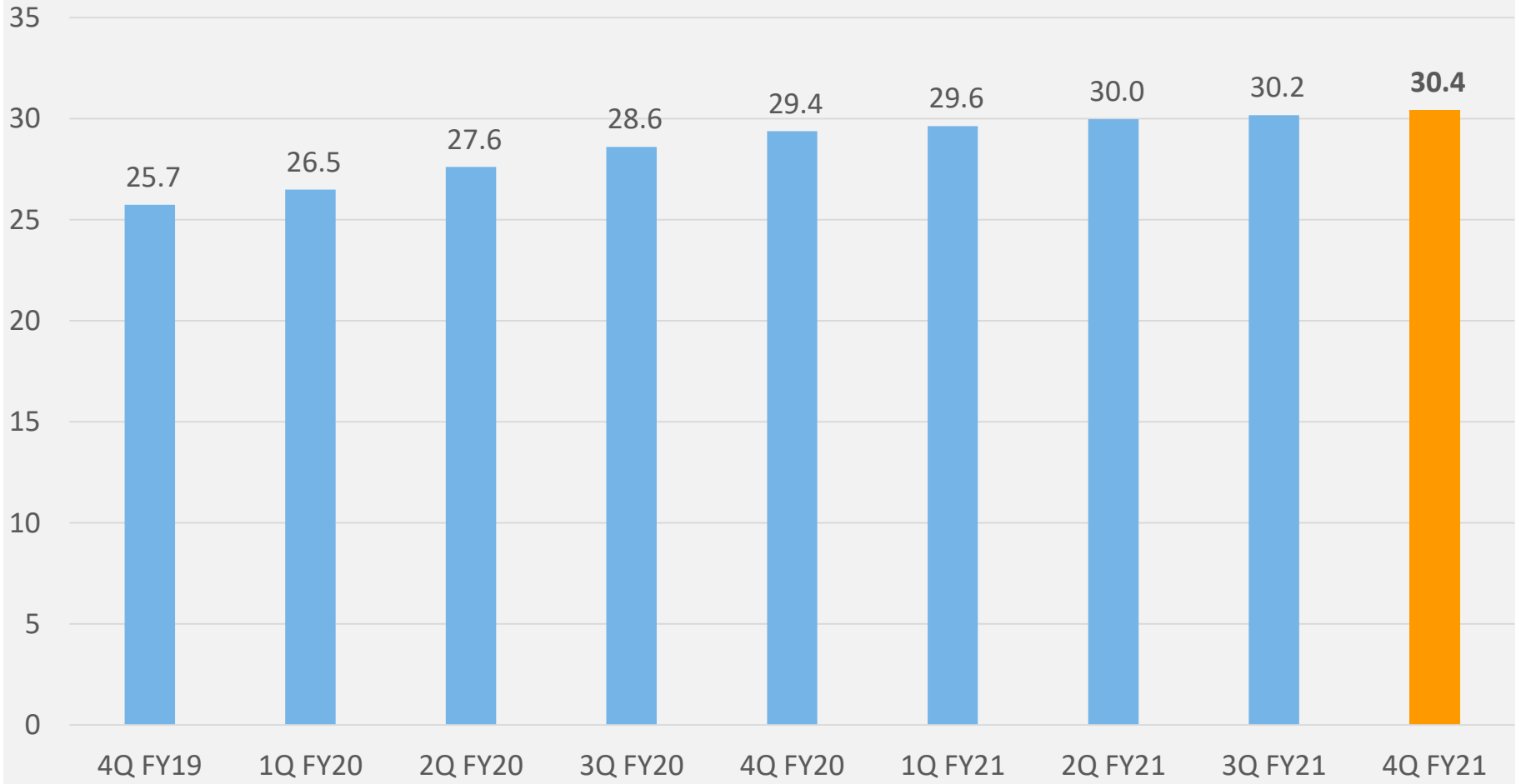
# USER ENGAGEMENT

## Ratings & Reviews (million)



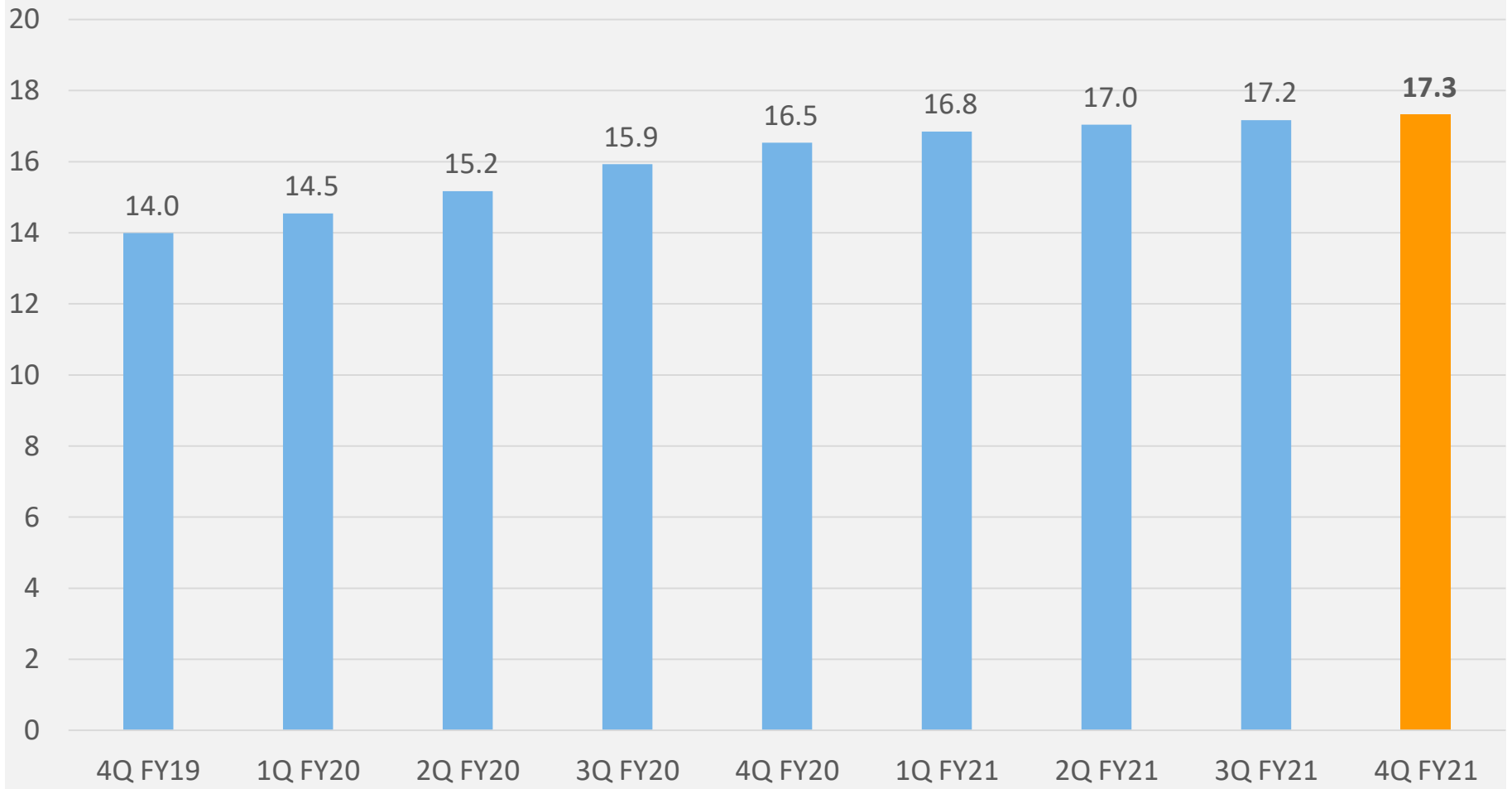
## DATA ENRICHMENT

### Active Listings - period end (million)

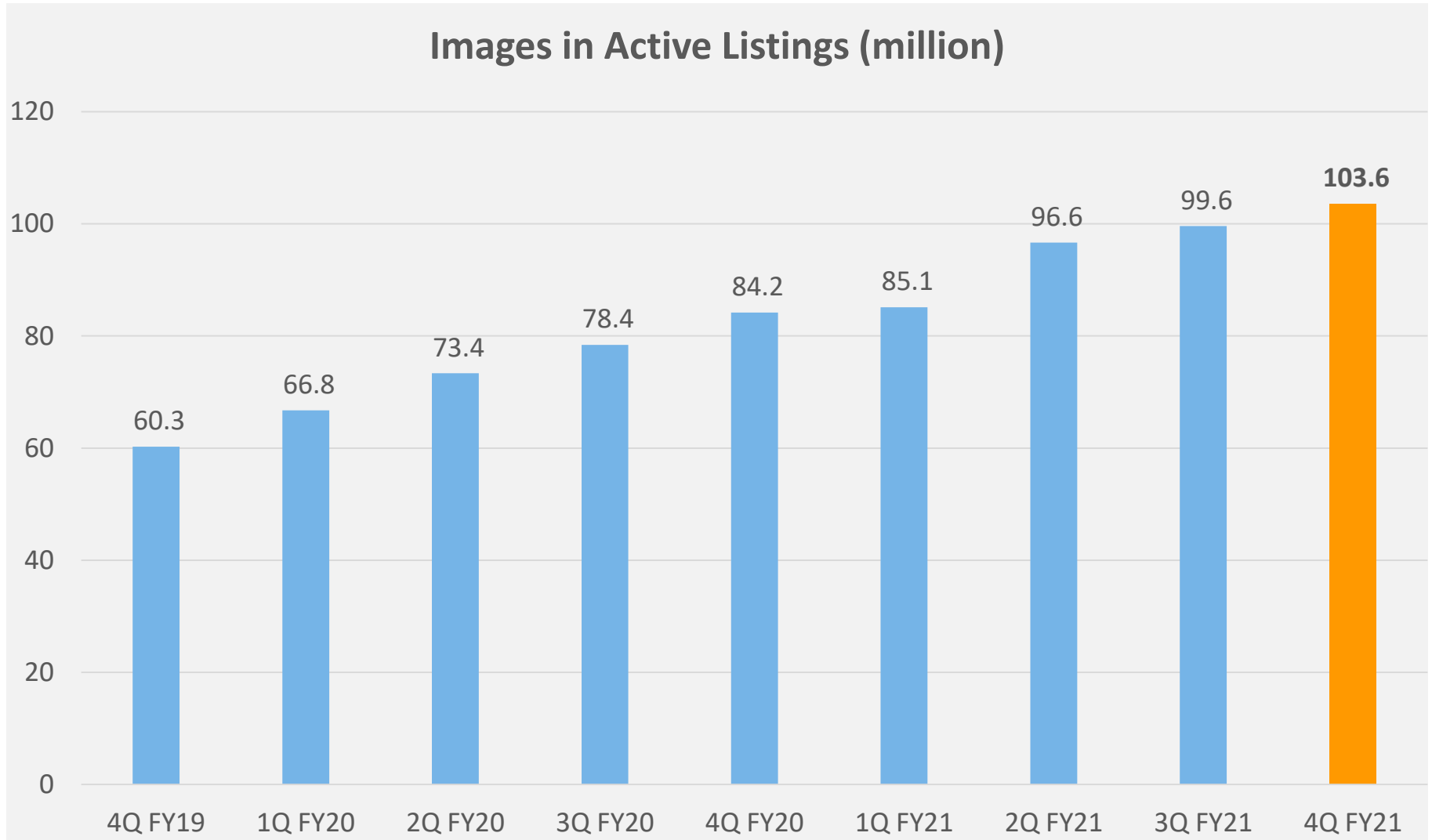


## DATA ENRICHMENT

### Listings with Geocodes (million)

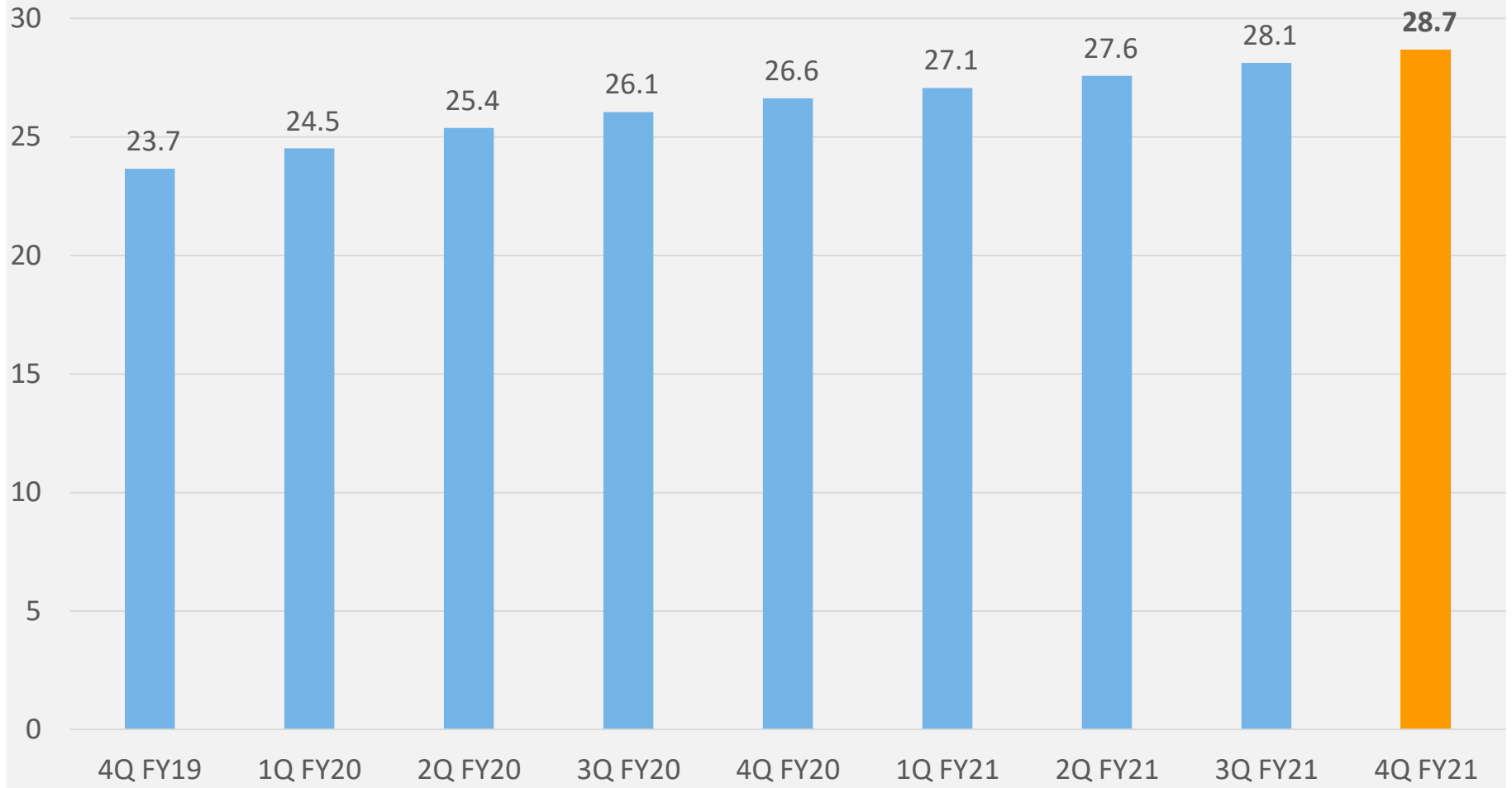


## DATA ENRICHMENT



# MOBILE APPS

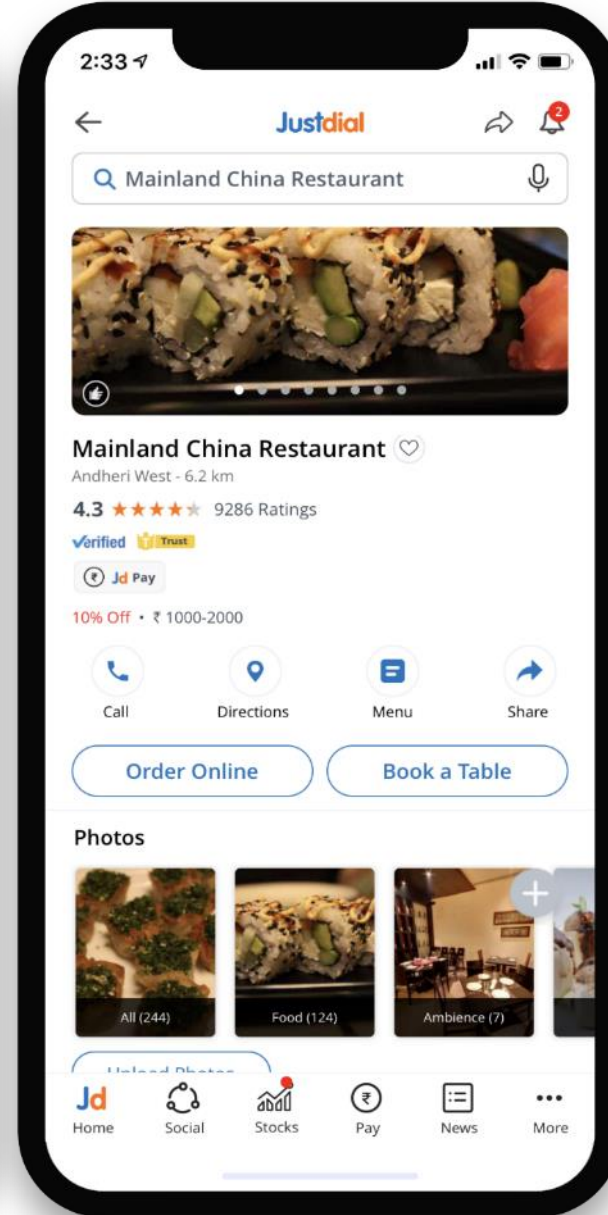
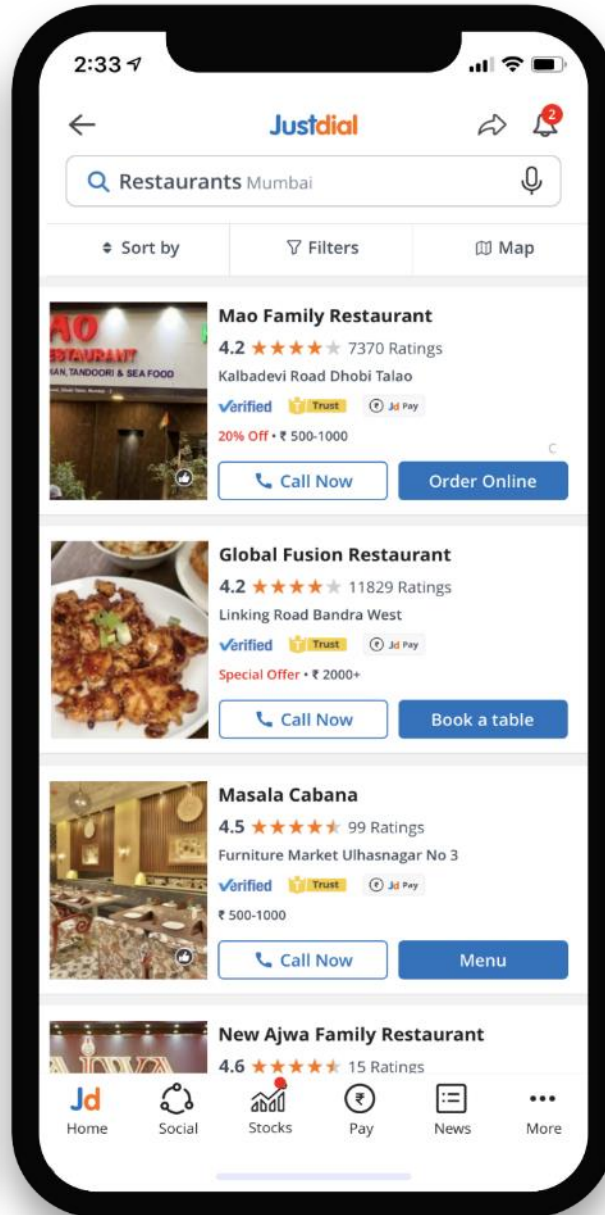
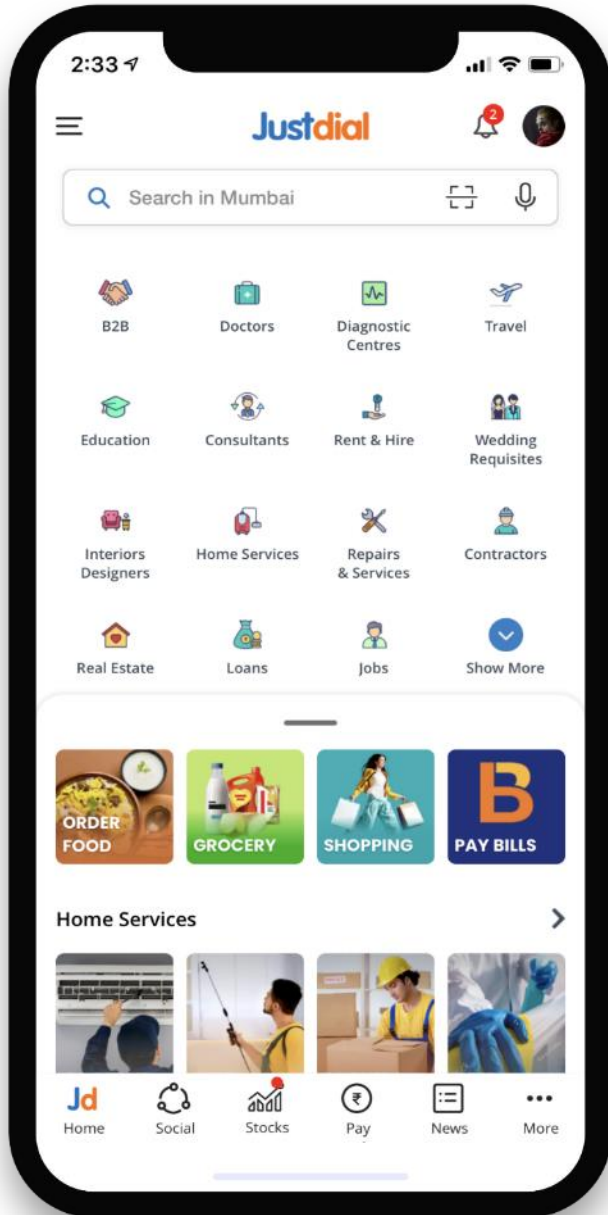
## Cumulative JD App Downloads (million)



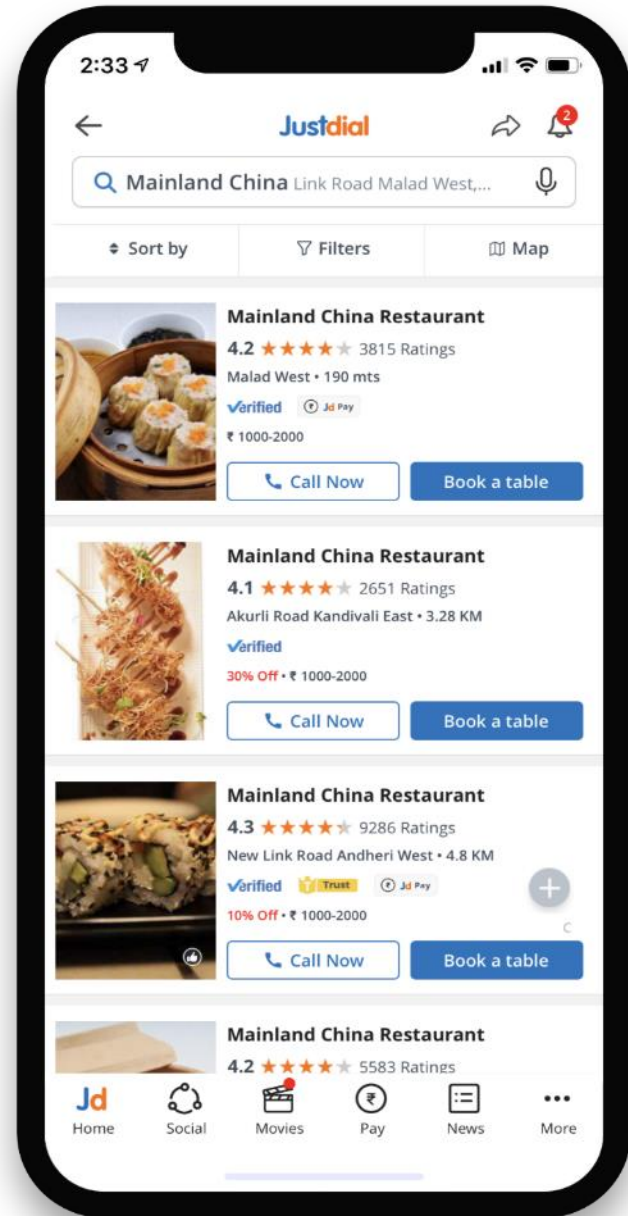
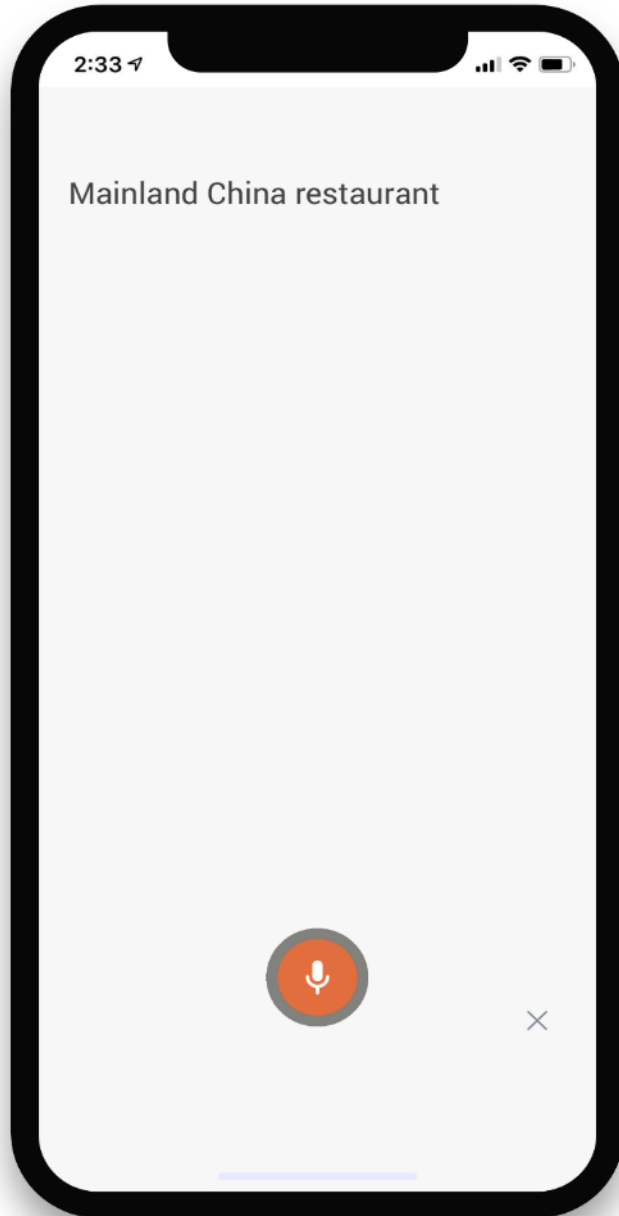


## PRODUCT OVERVIEW

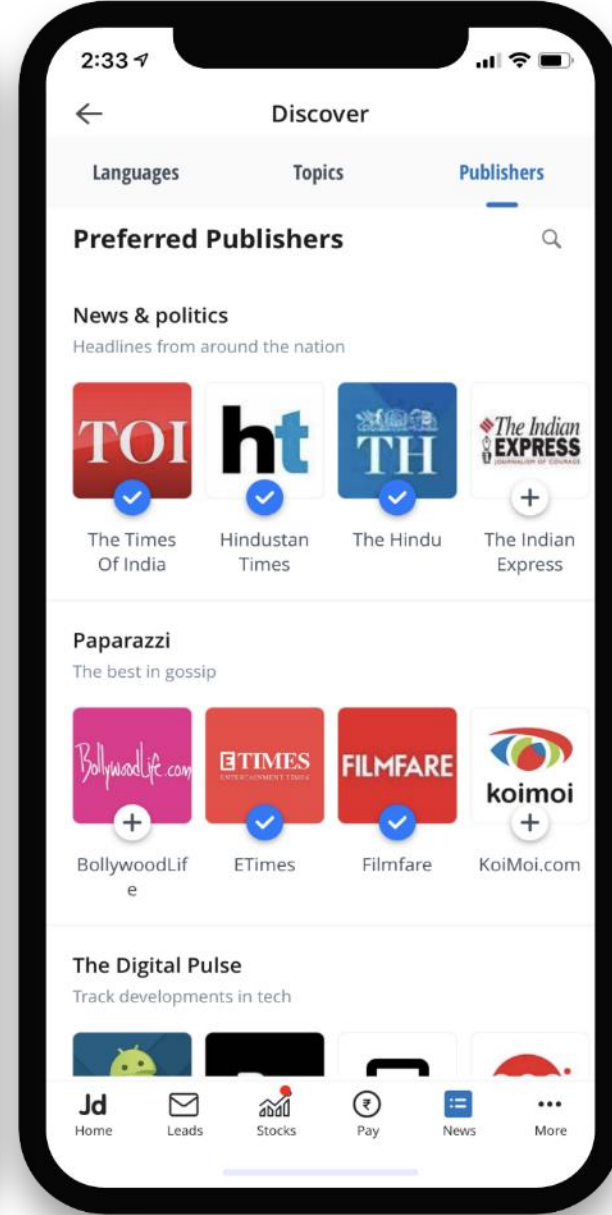
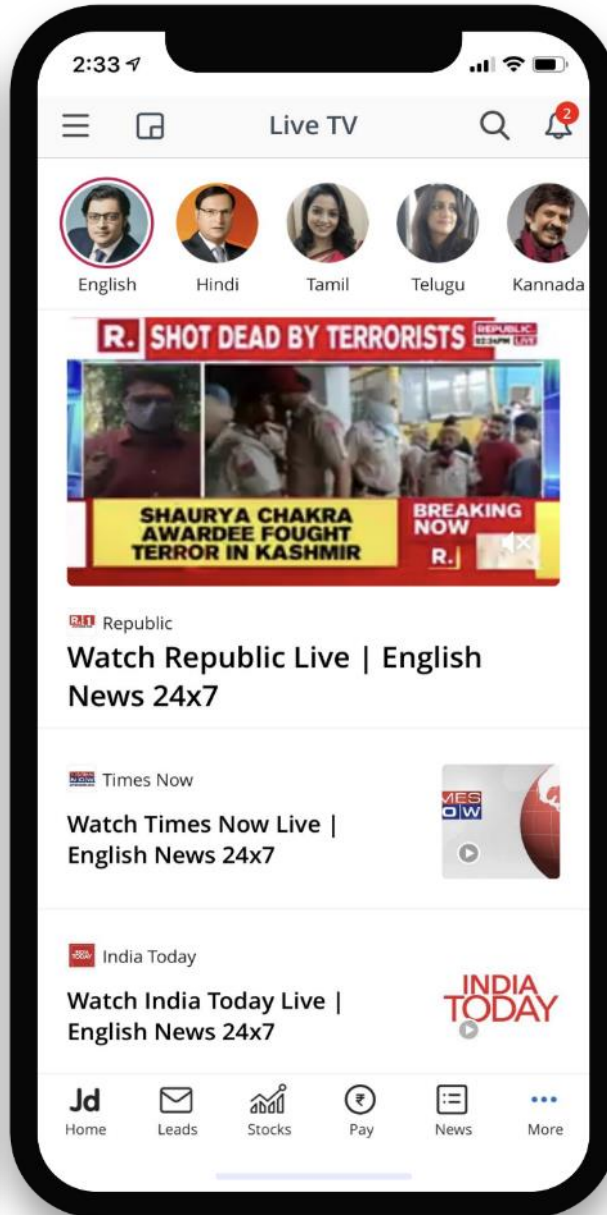
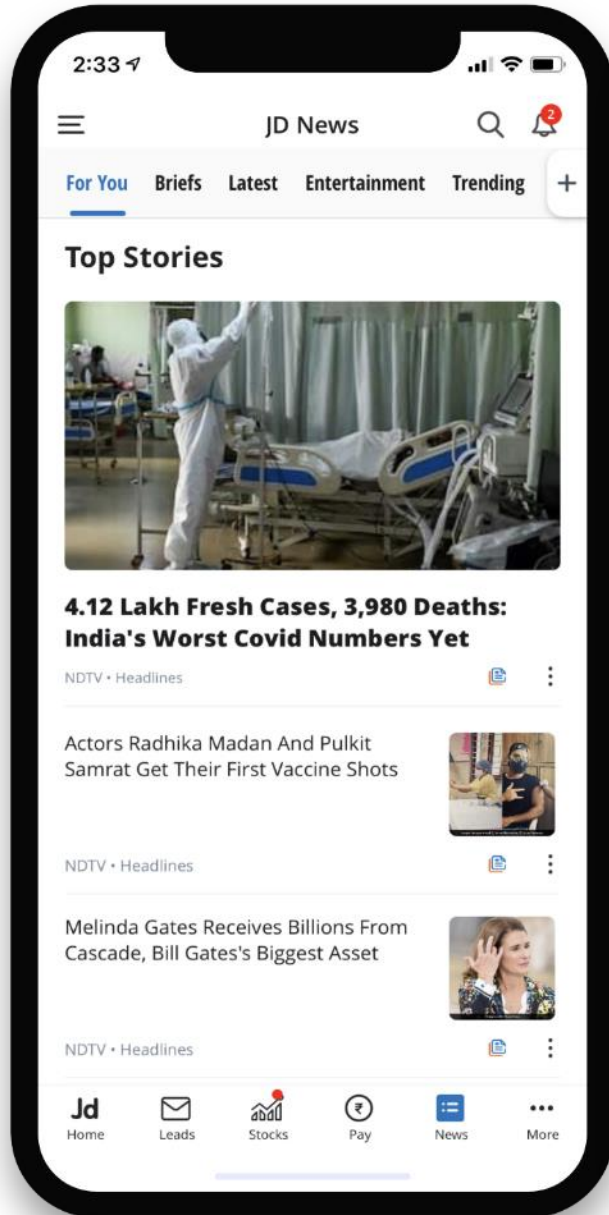
# JD - MOBILE



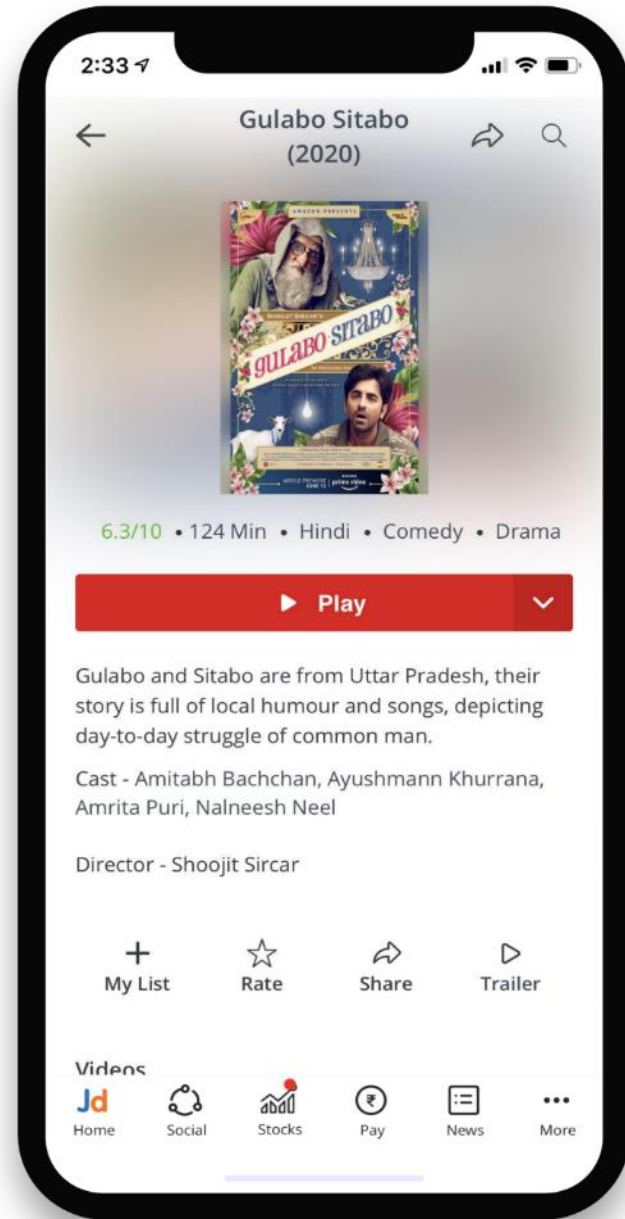
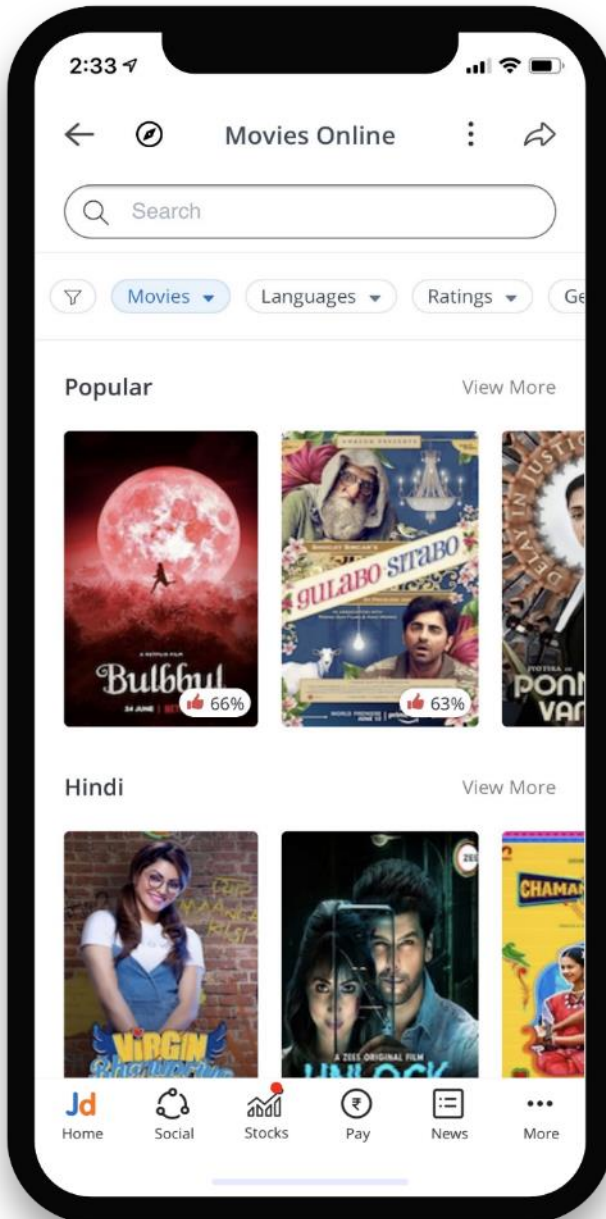
# VOICE SEARCH

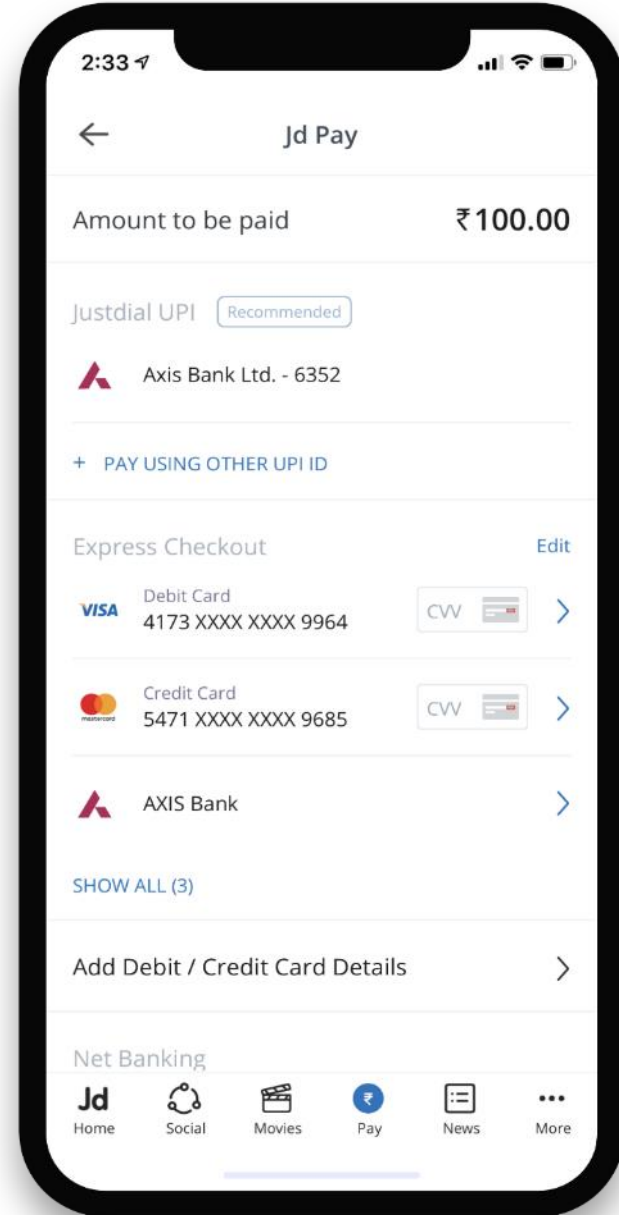
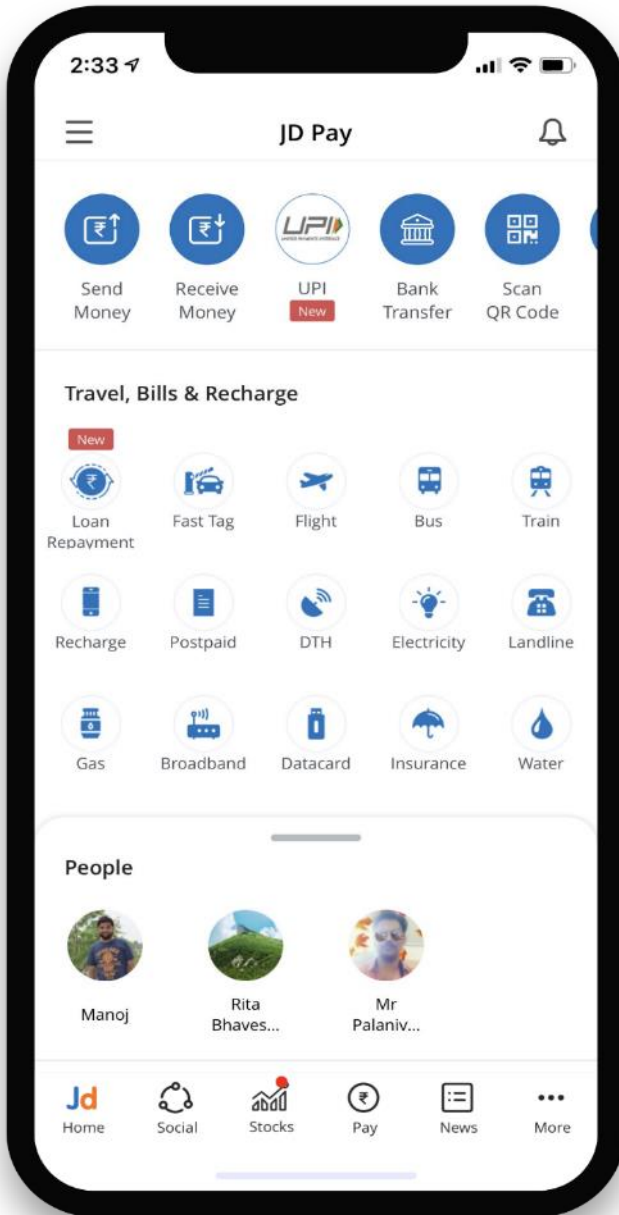




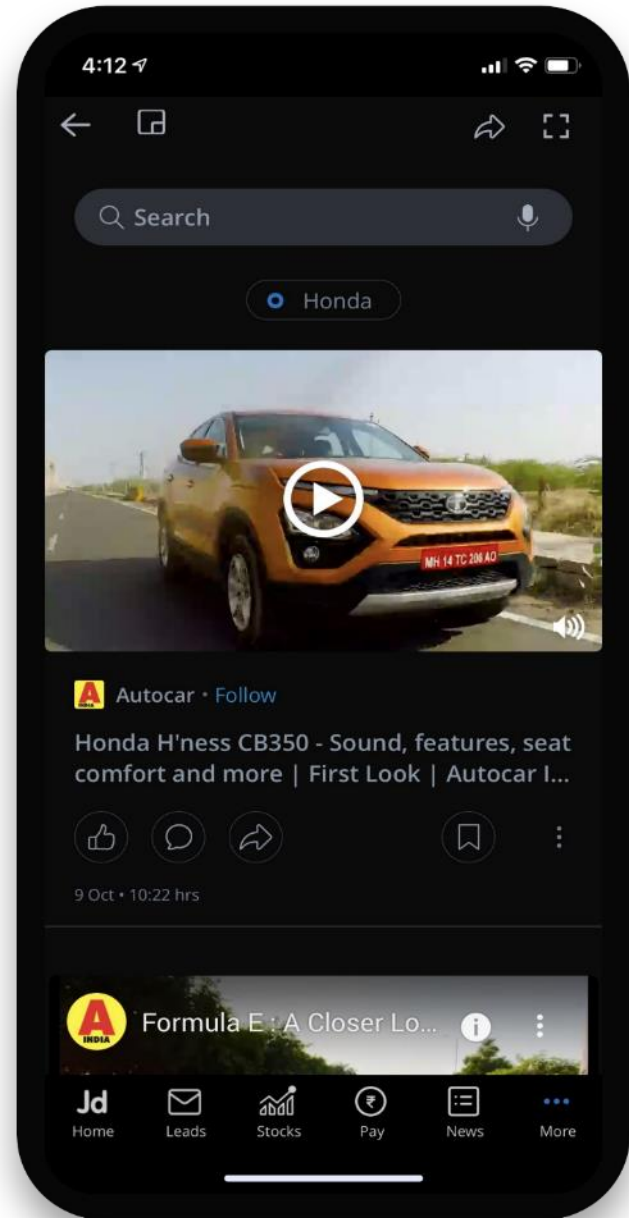
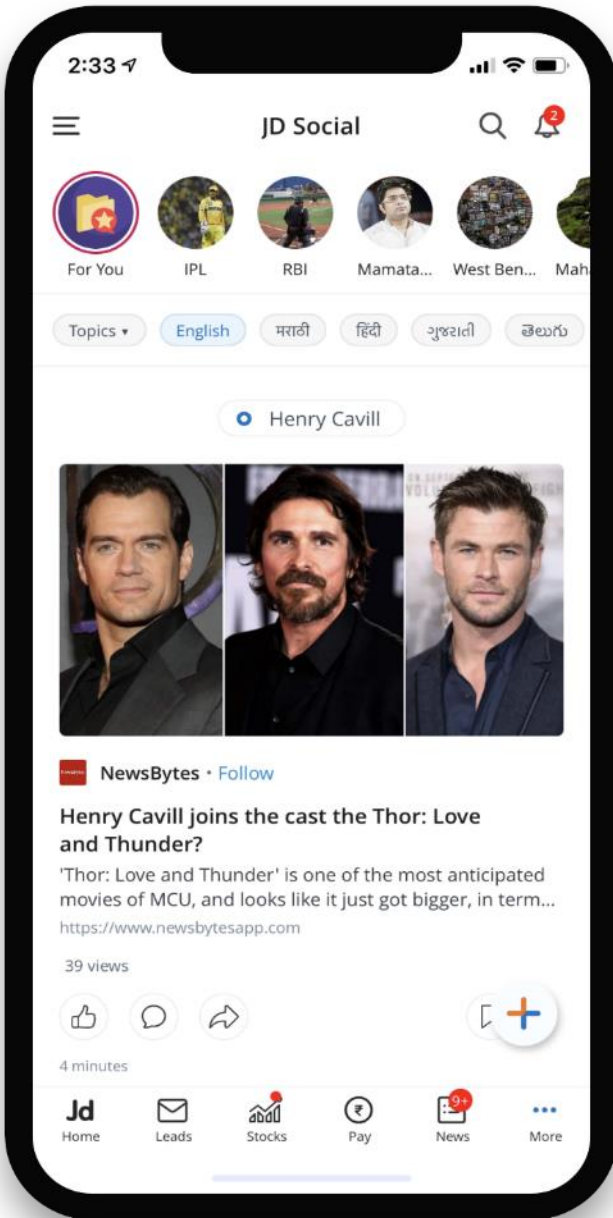


# MOVIES ONLINE





# JD SOCIAL



# BEYOND SEARCH

## Price Comparison

Hail a Cab

Flight Tickets

Train Tickets

Bus Tickets

Hotel Bookings

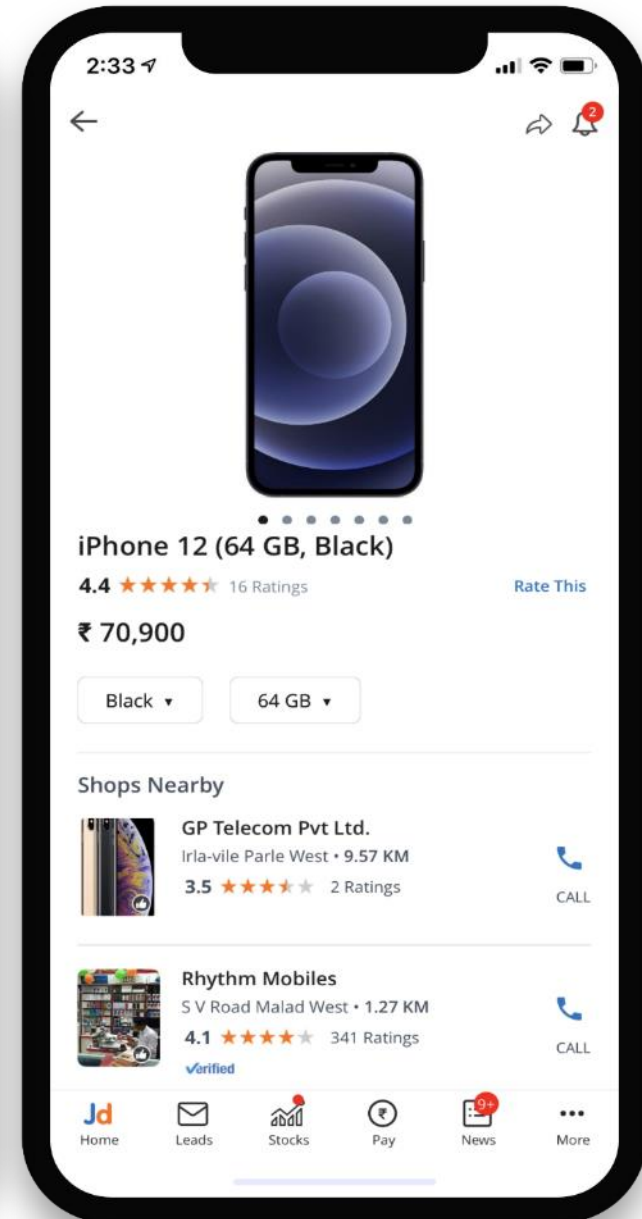
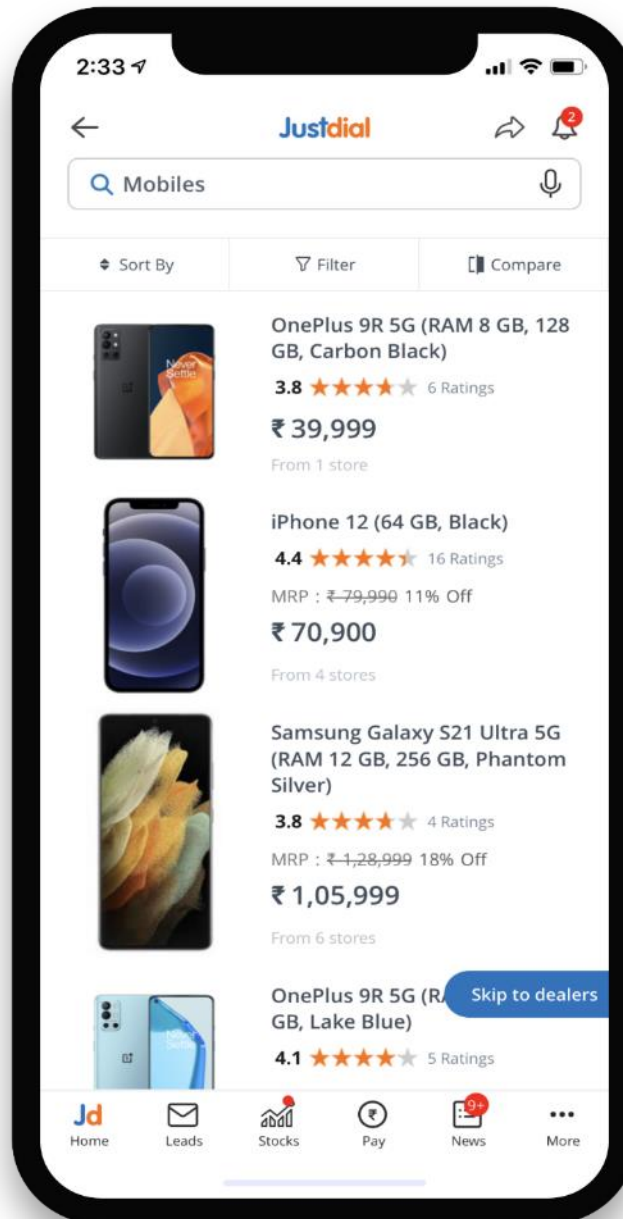
Bills & Recharge

Stocks

Augmented Reality

Pay via UPI

... and many more.



# BEYOND SEARCH

Price Comparison

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Hotel Bookings

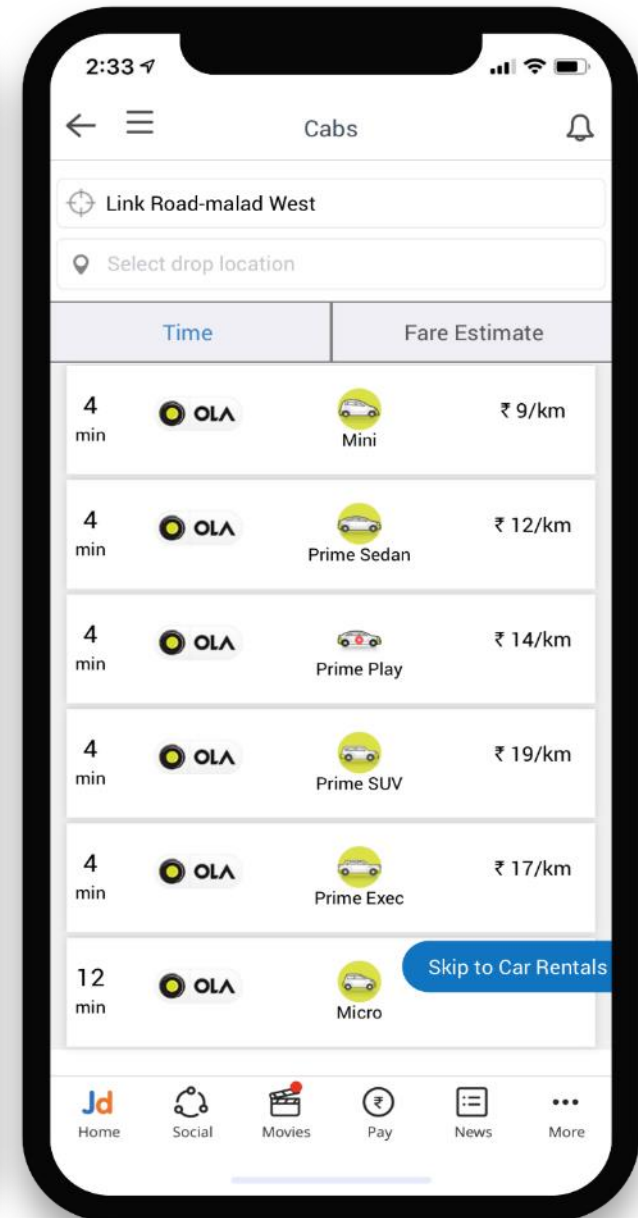
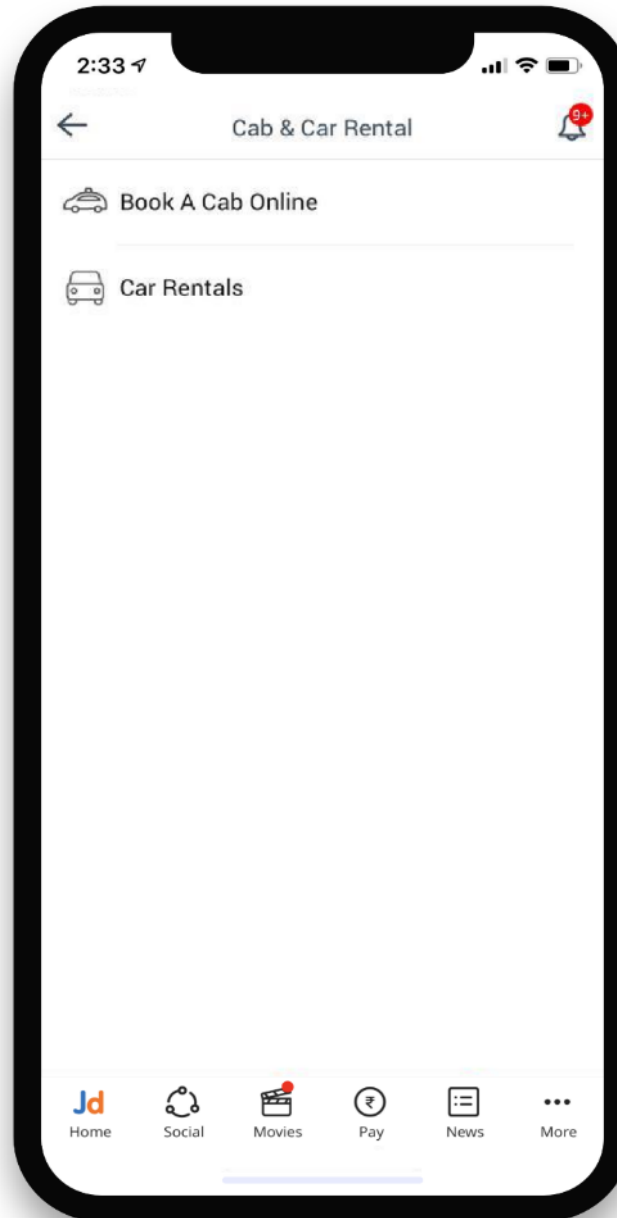
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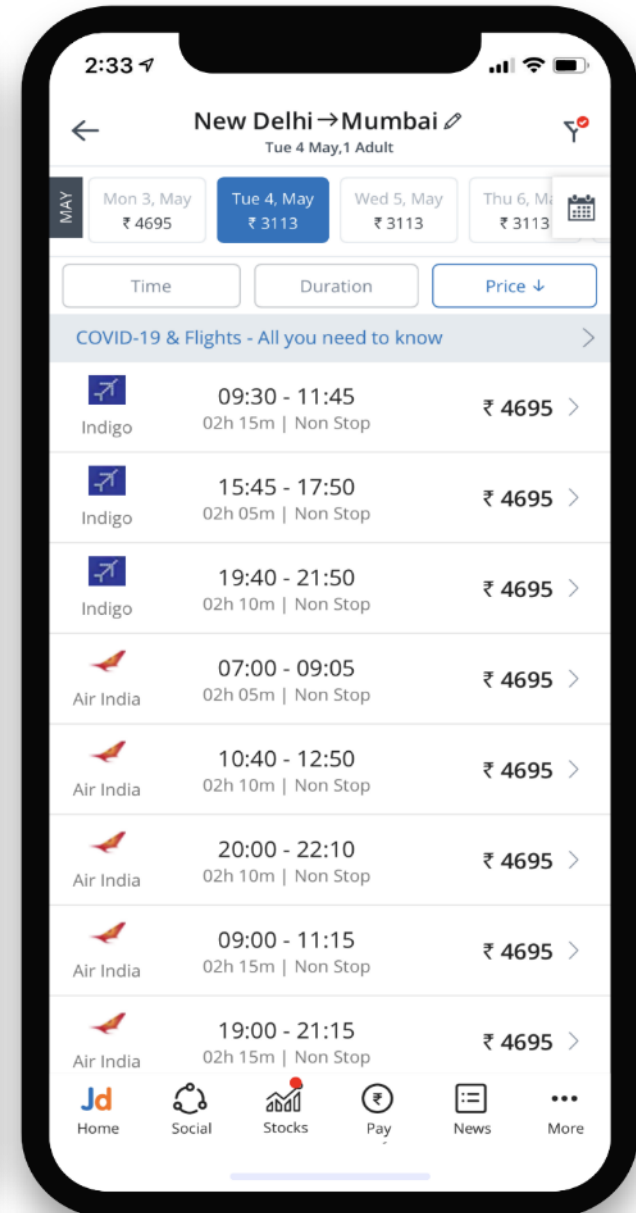
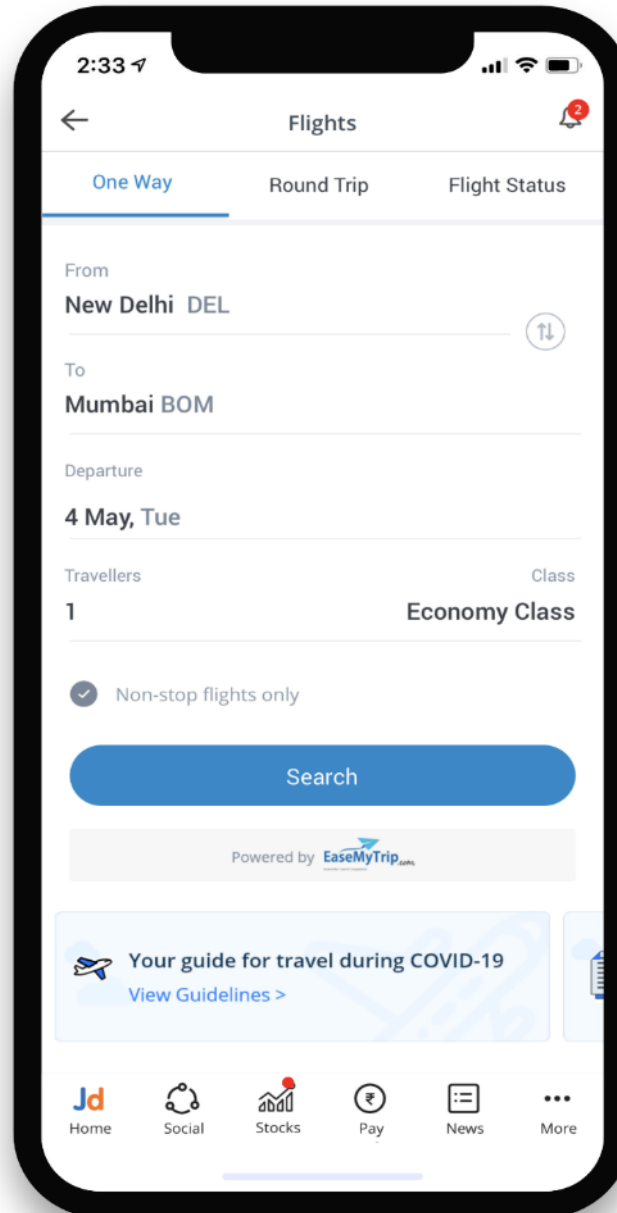
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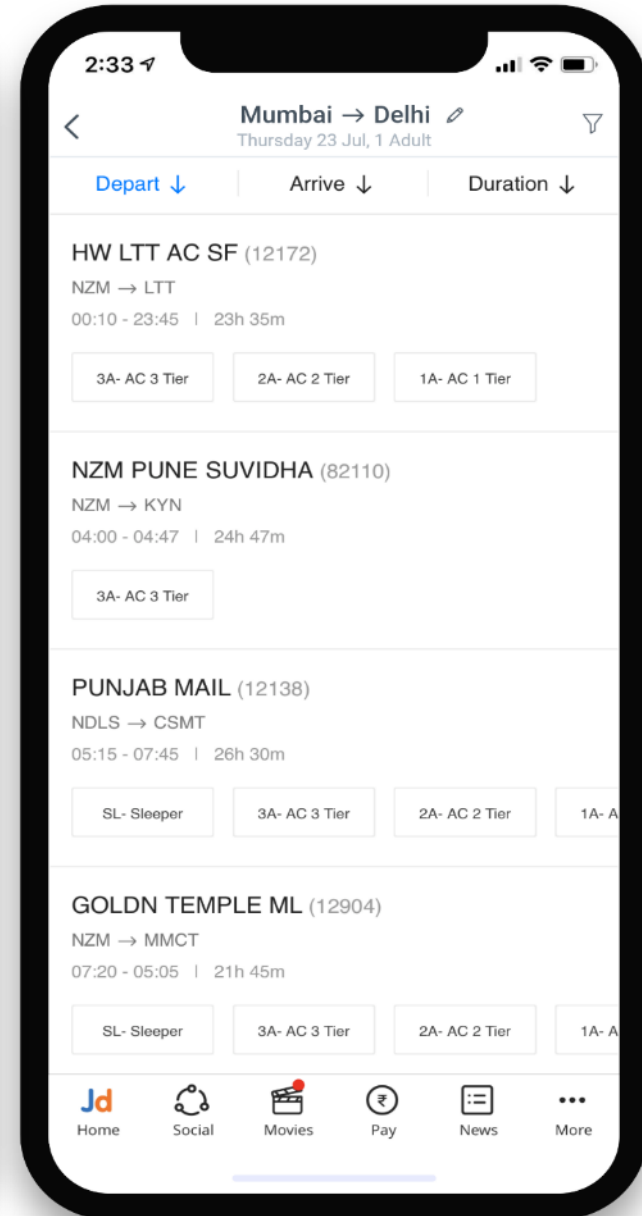
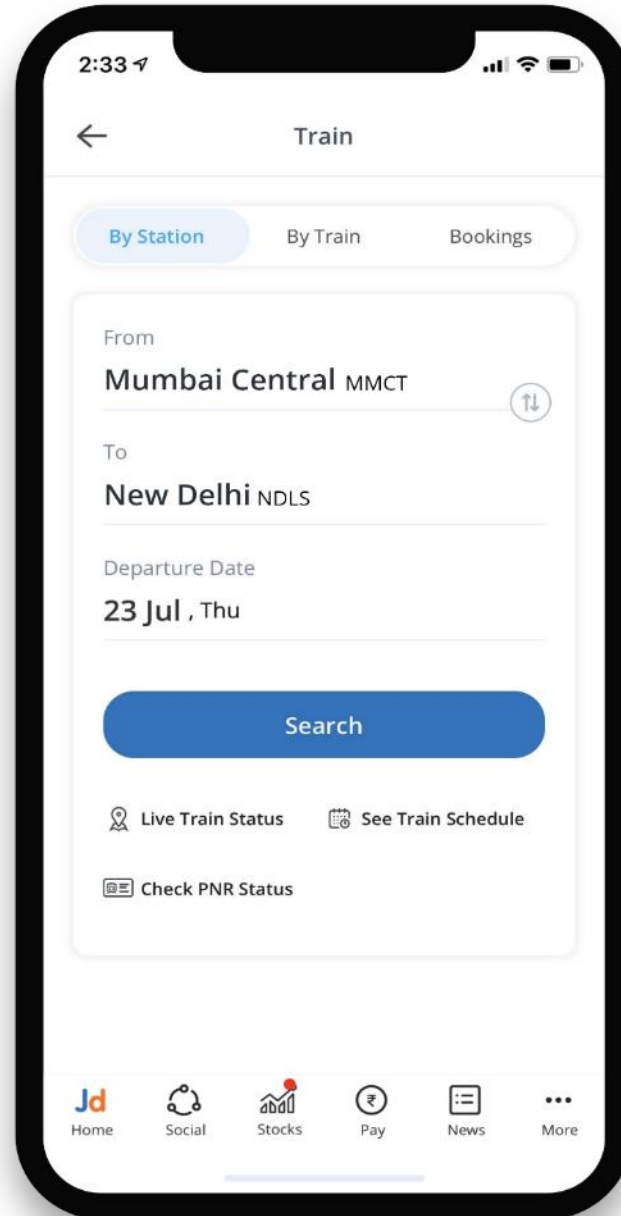
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Price Comparison

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Train Tickets

 **Bus Tickets**

Hotel Bookings

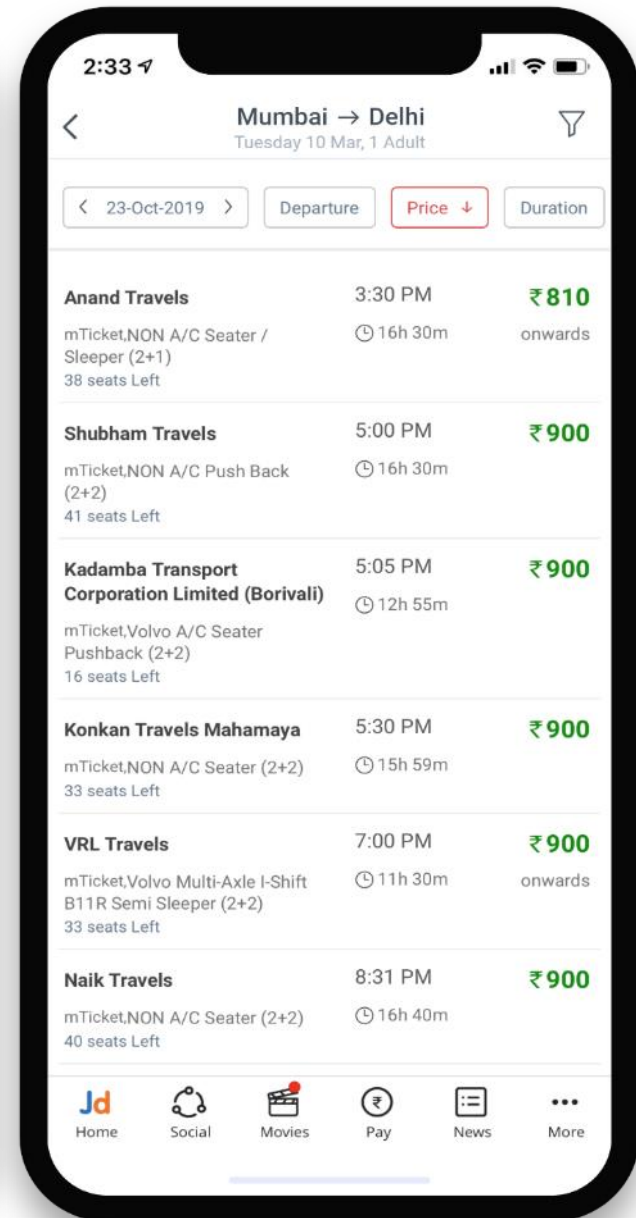
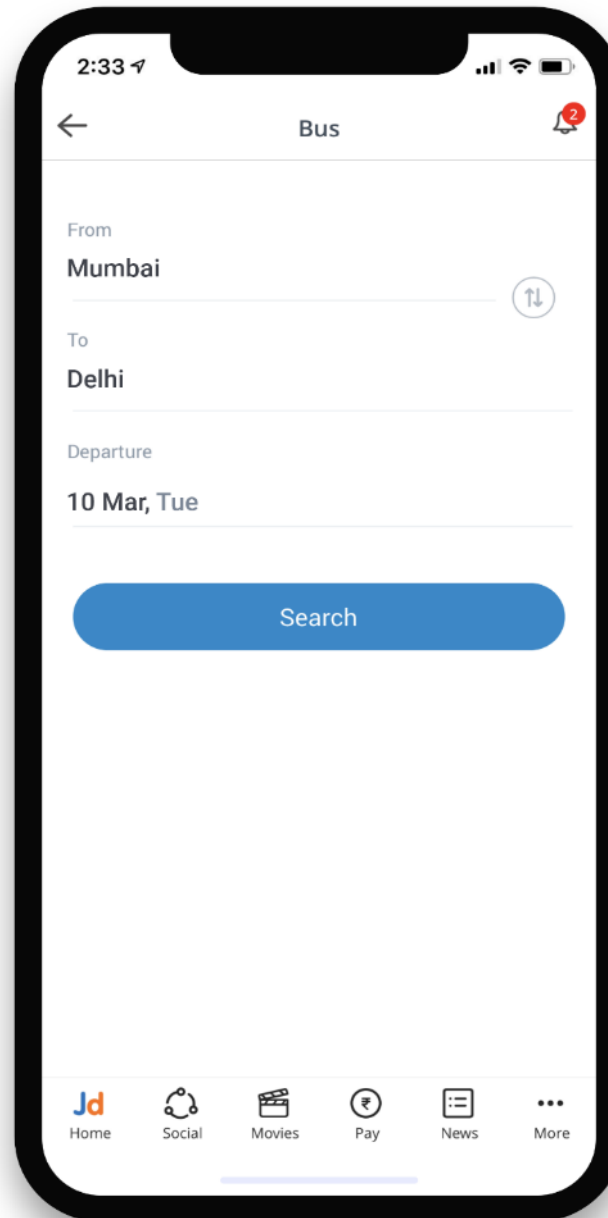
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Bus Tickets

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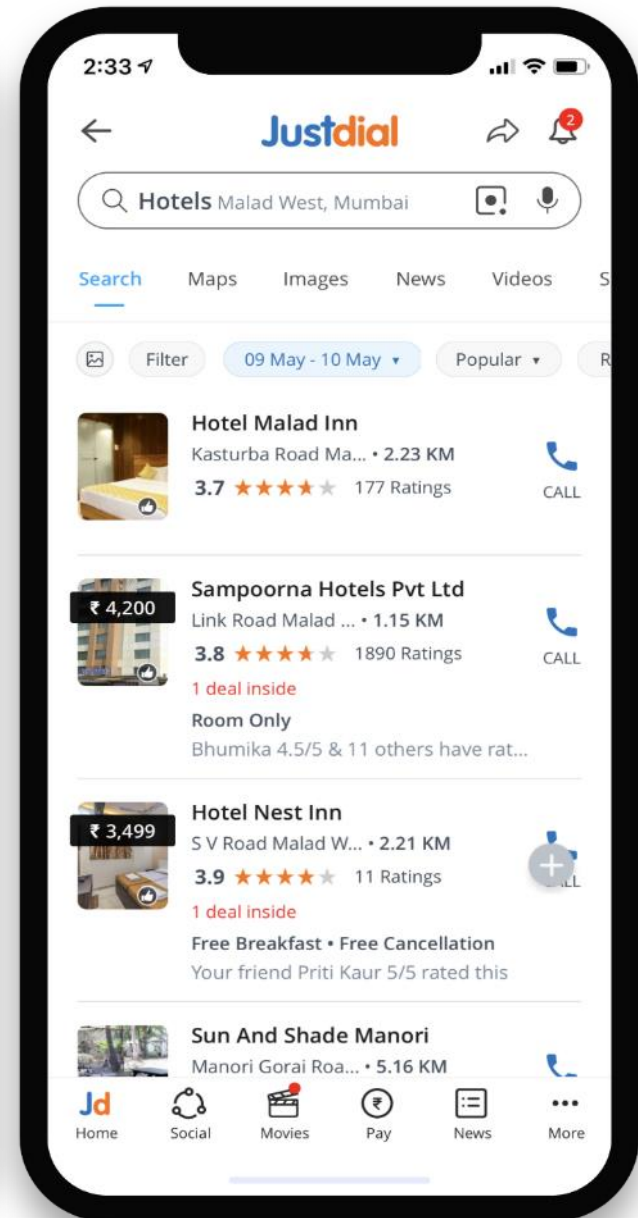
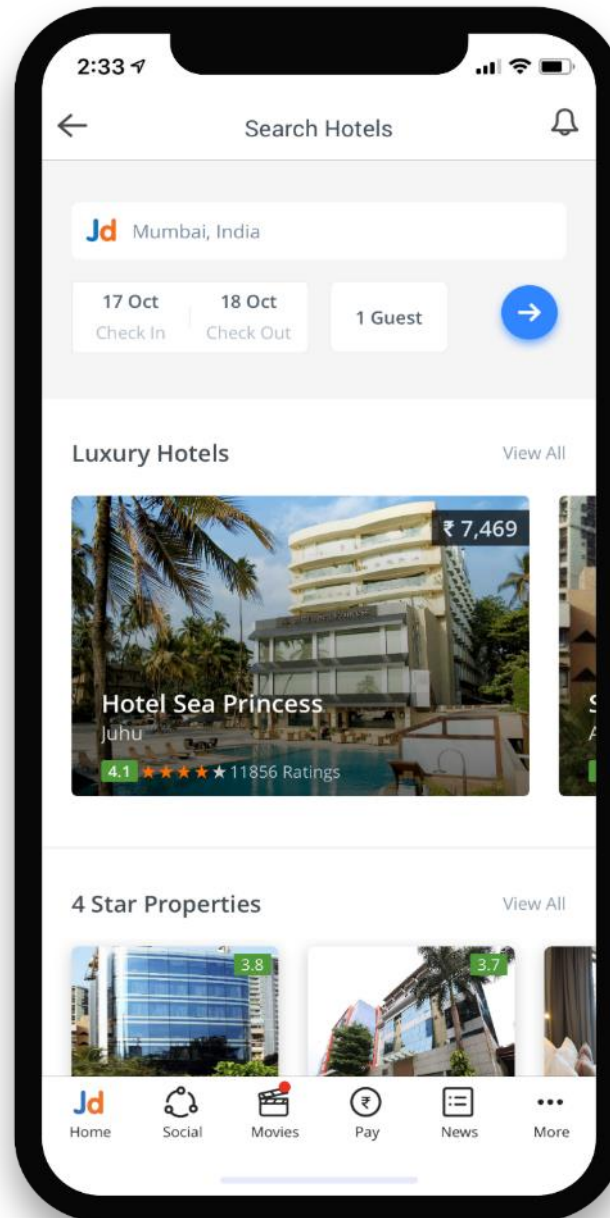
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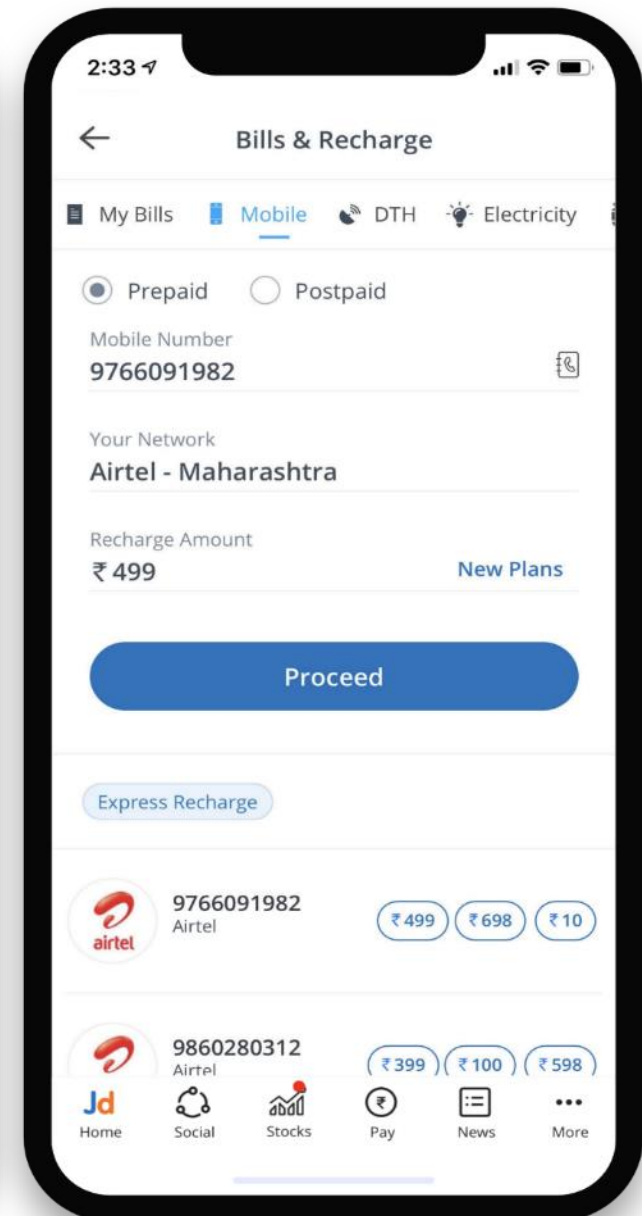
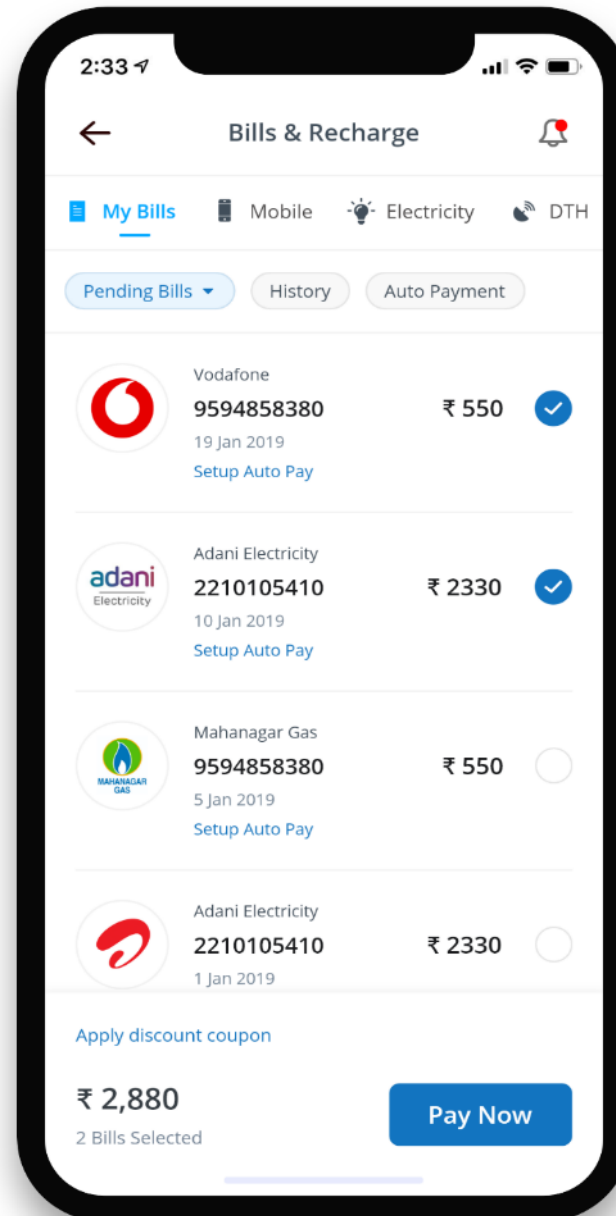
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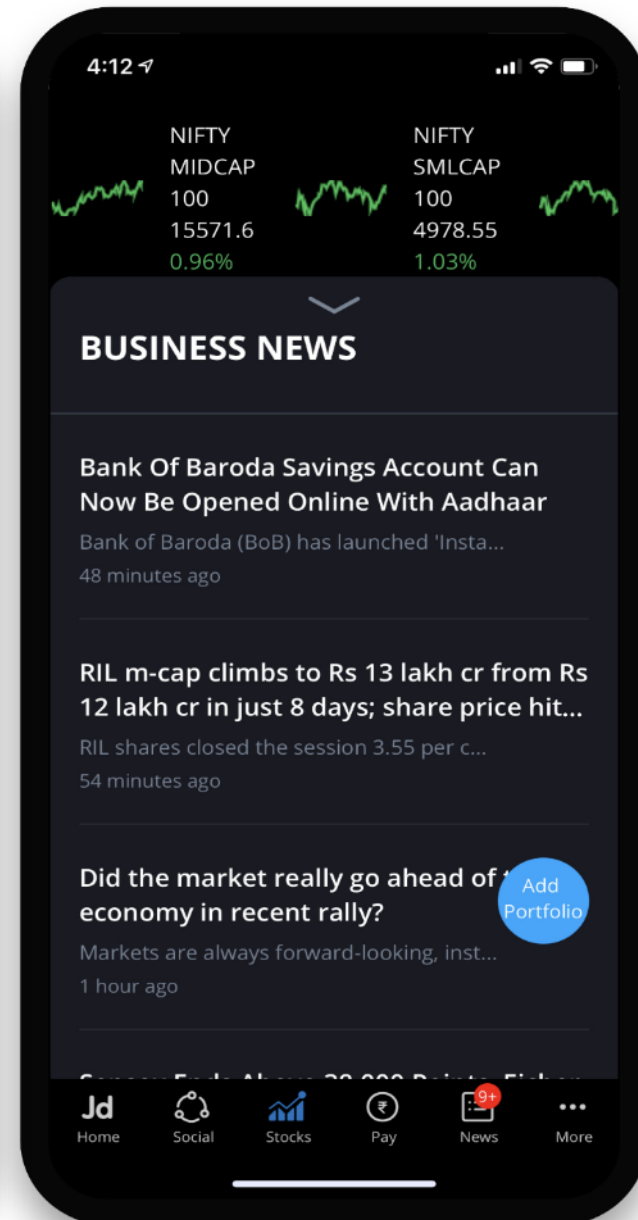
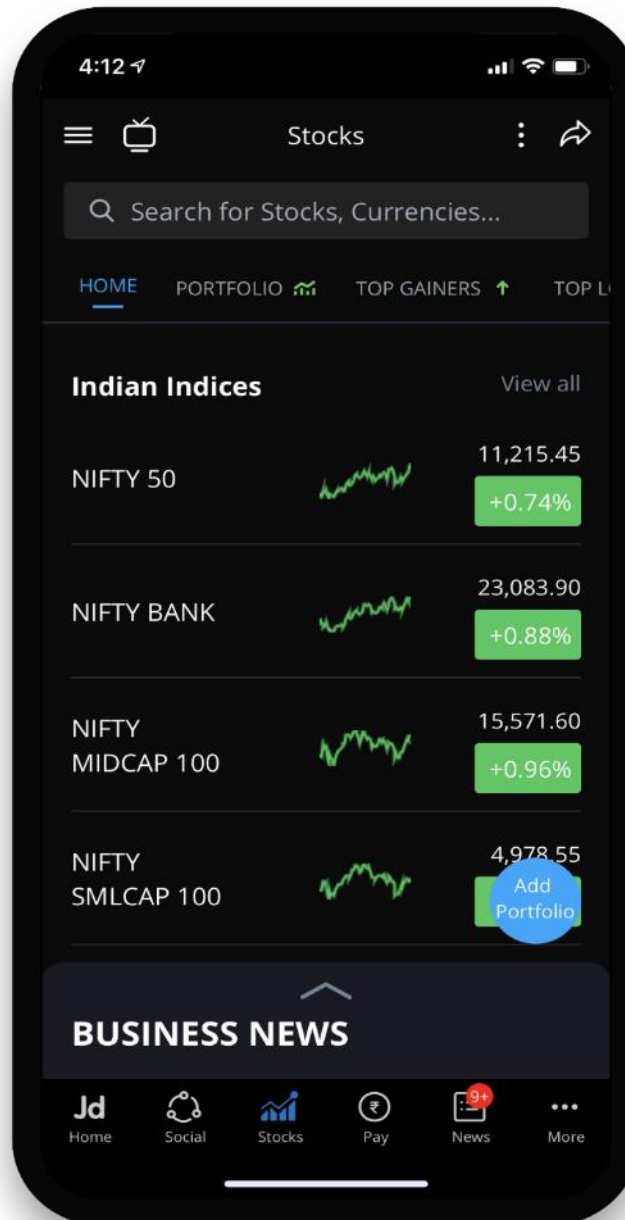
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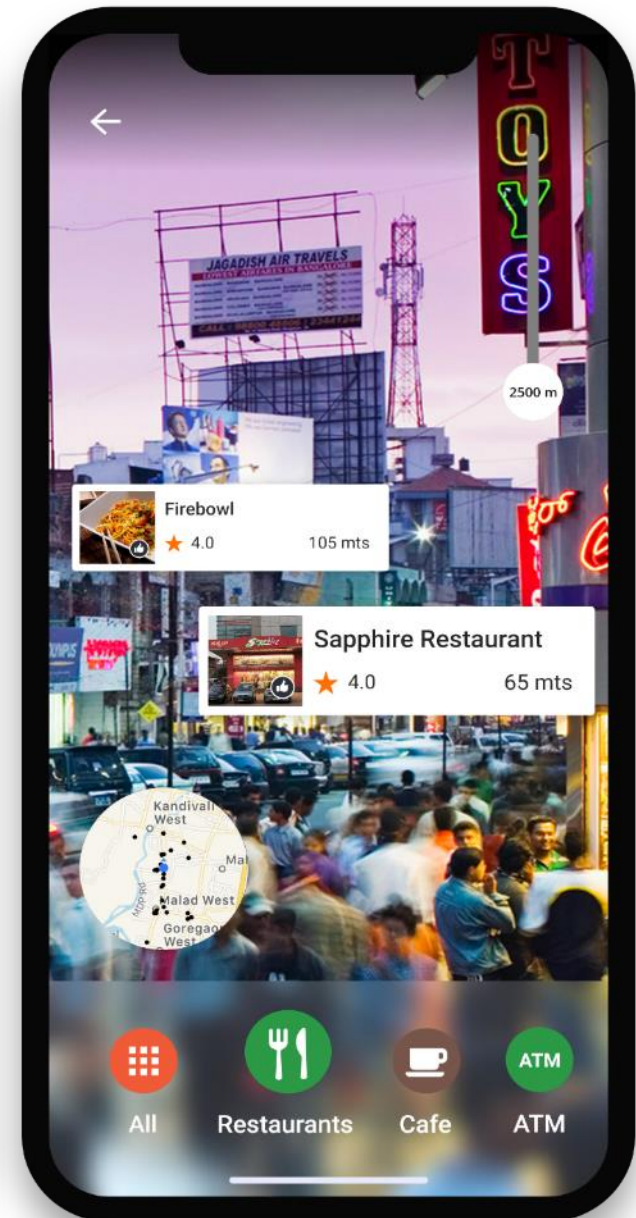
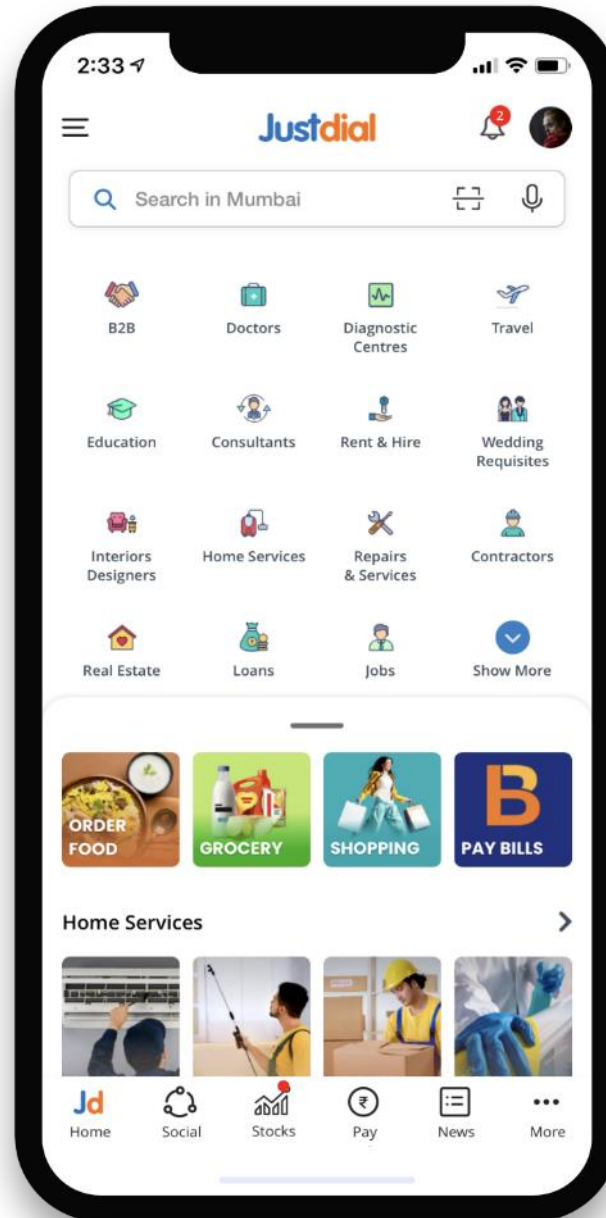
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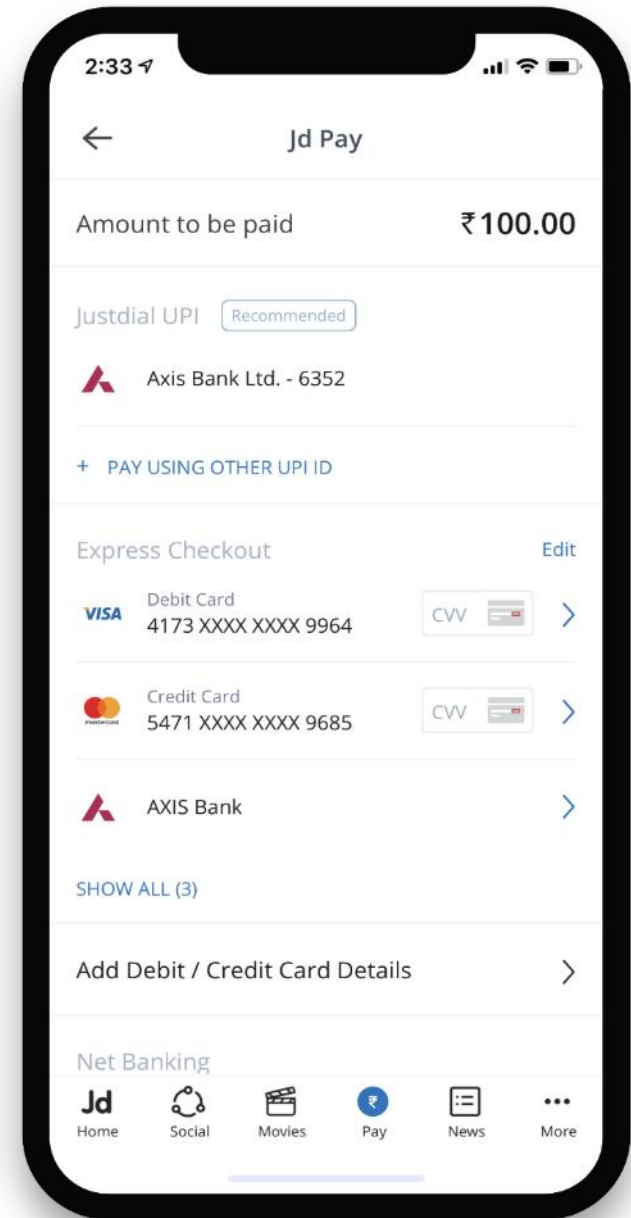
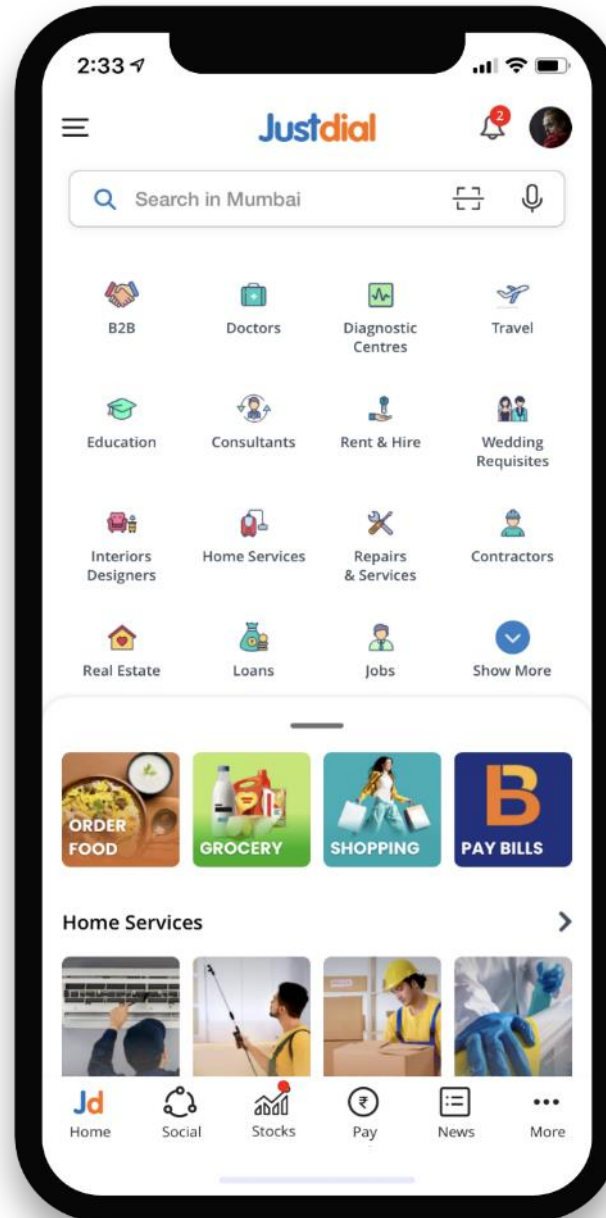
Bills & Recharge

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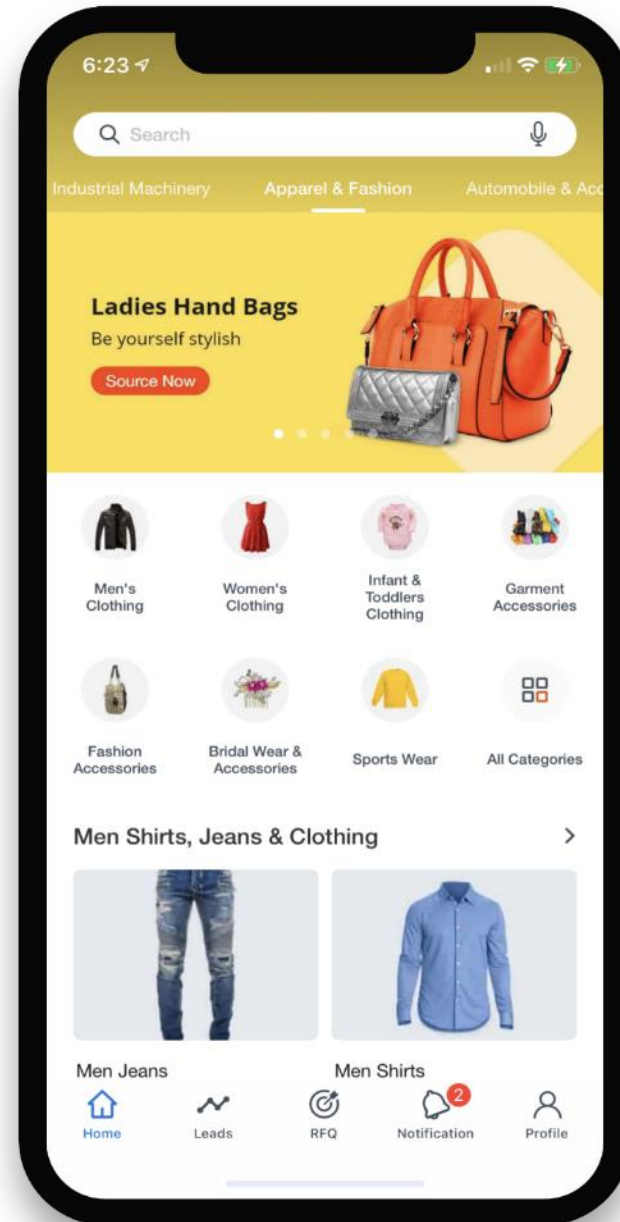
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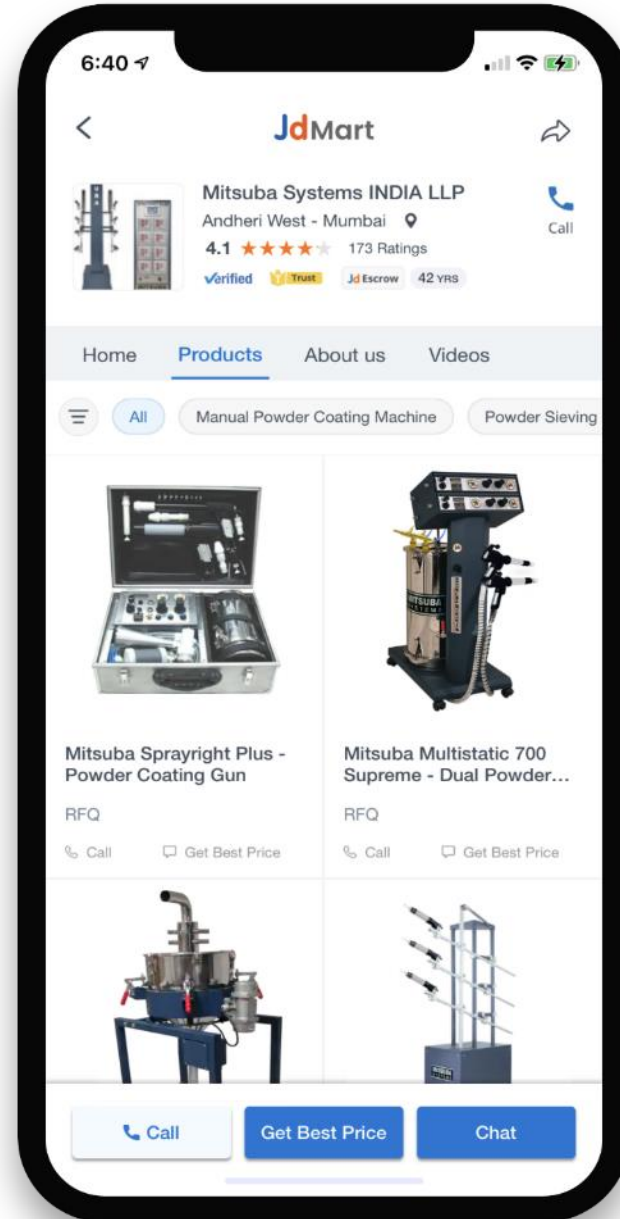
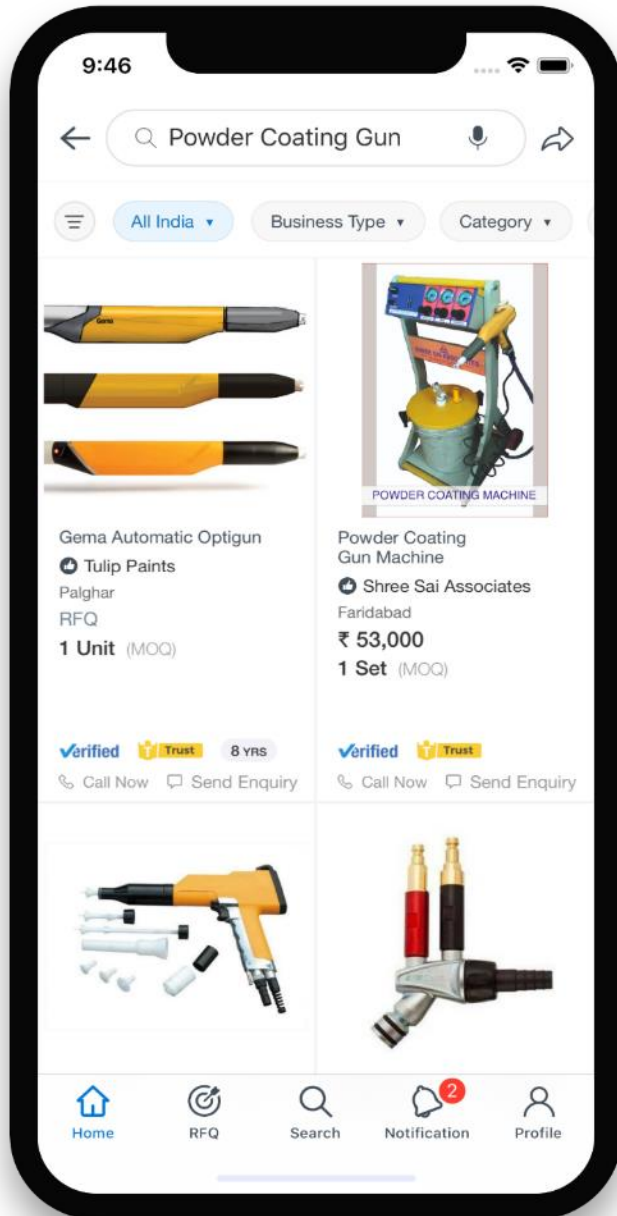
NEW INITIATIVES

# JD Mart – Exclusive B2B Platform, a New Wholesale Experience

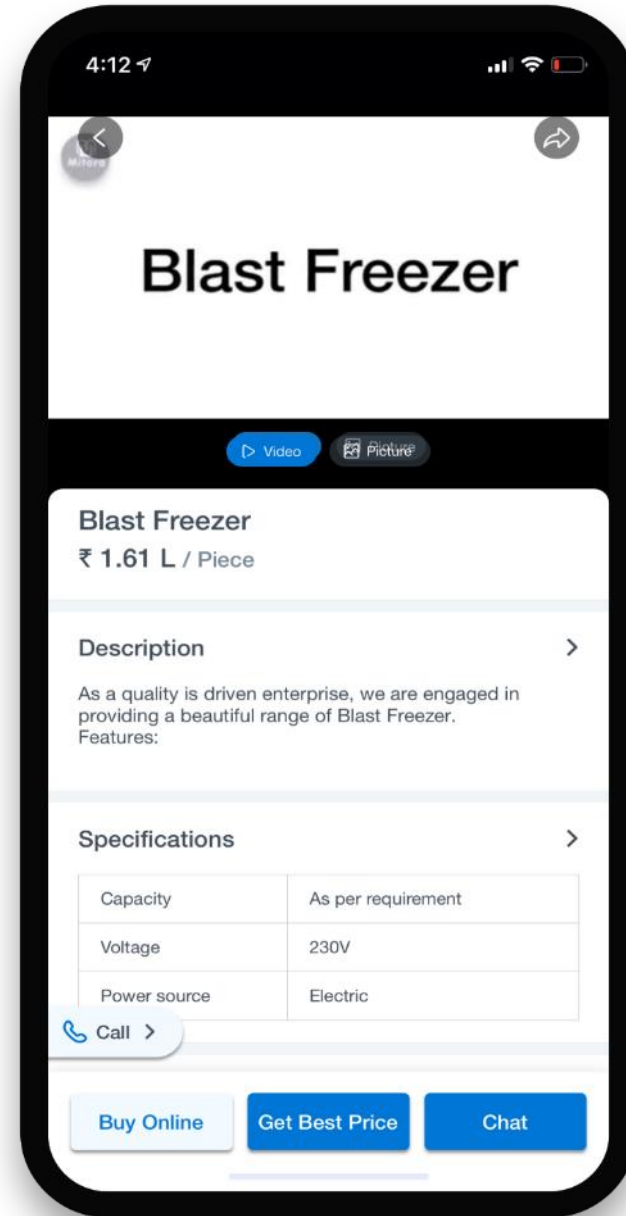
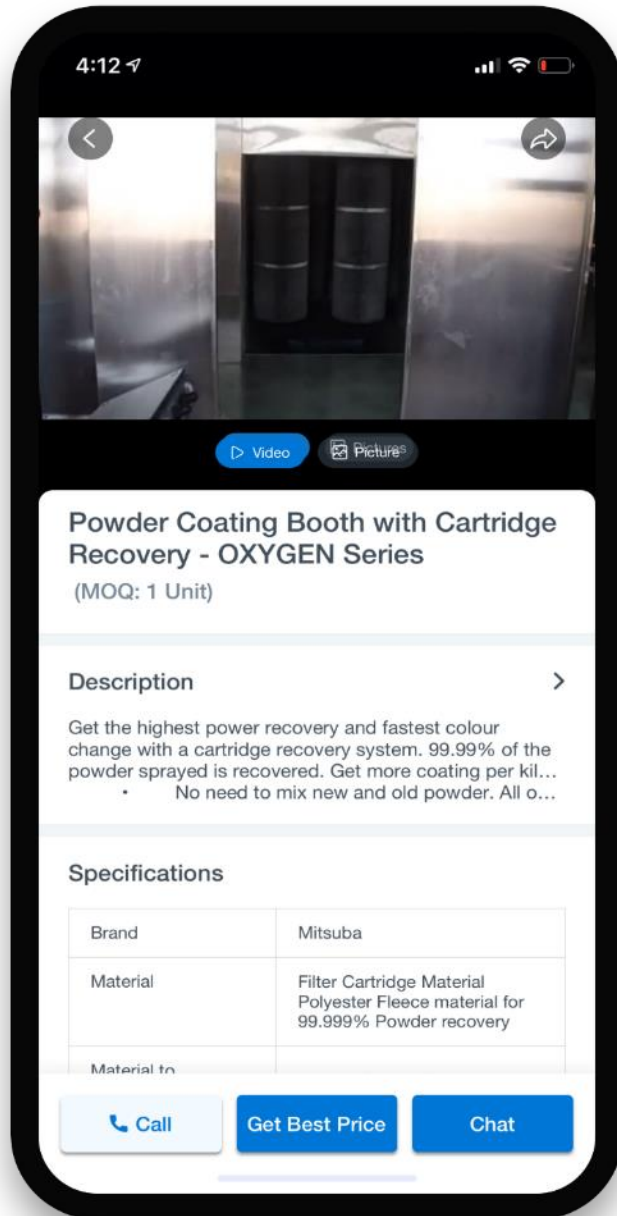




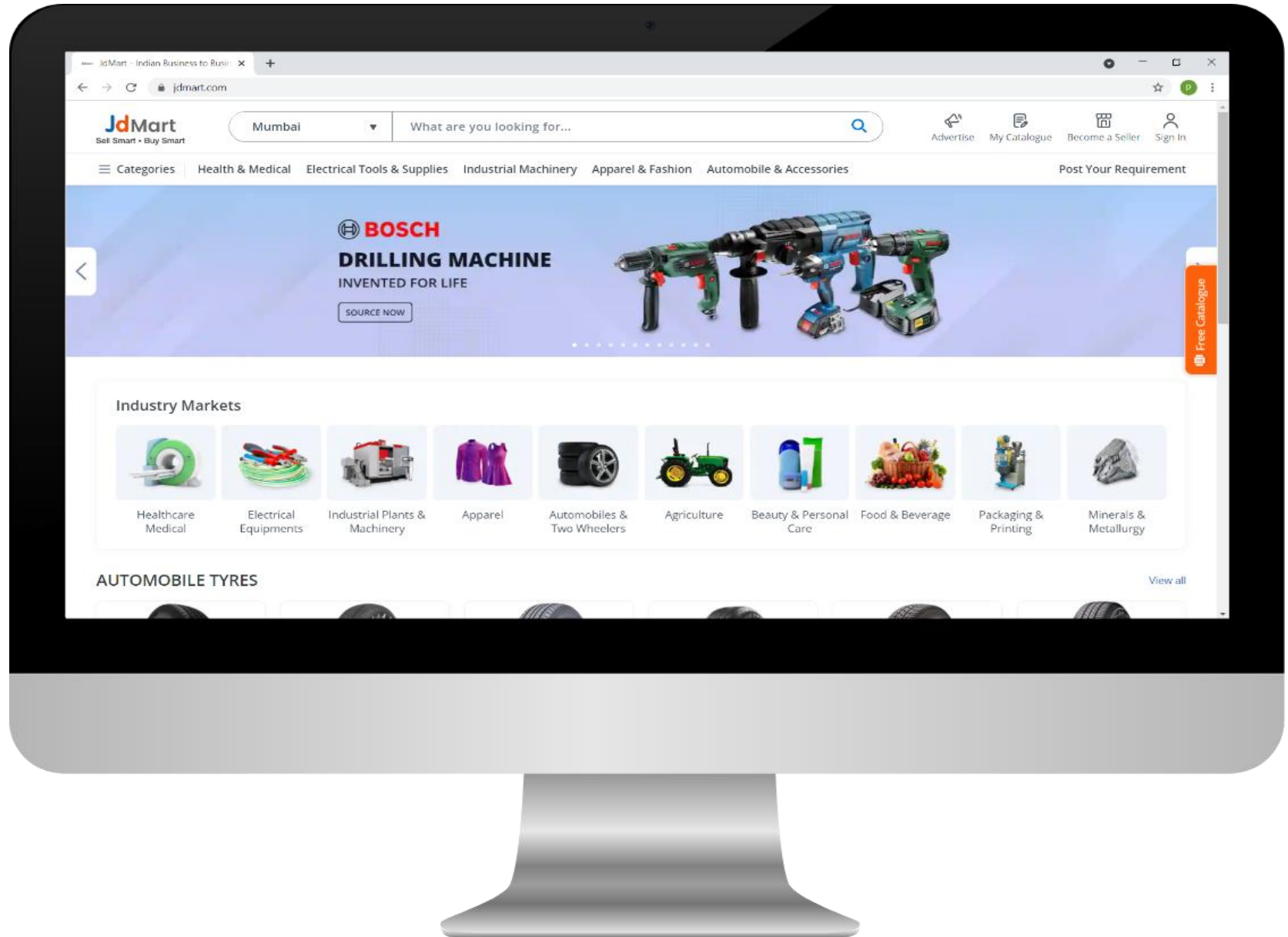
# JD Mart – Exclusive B2B Platform, a New Wholesale Experience



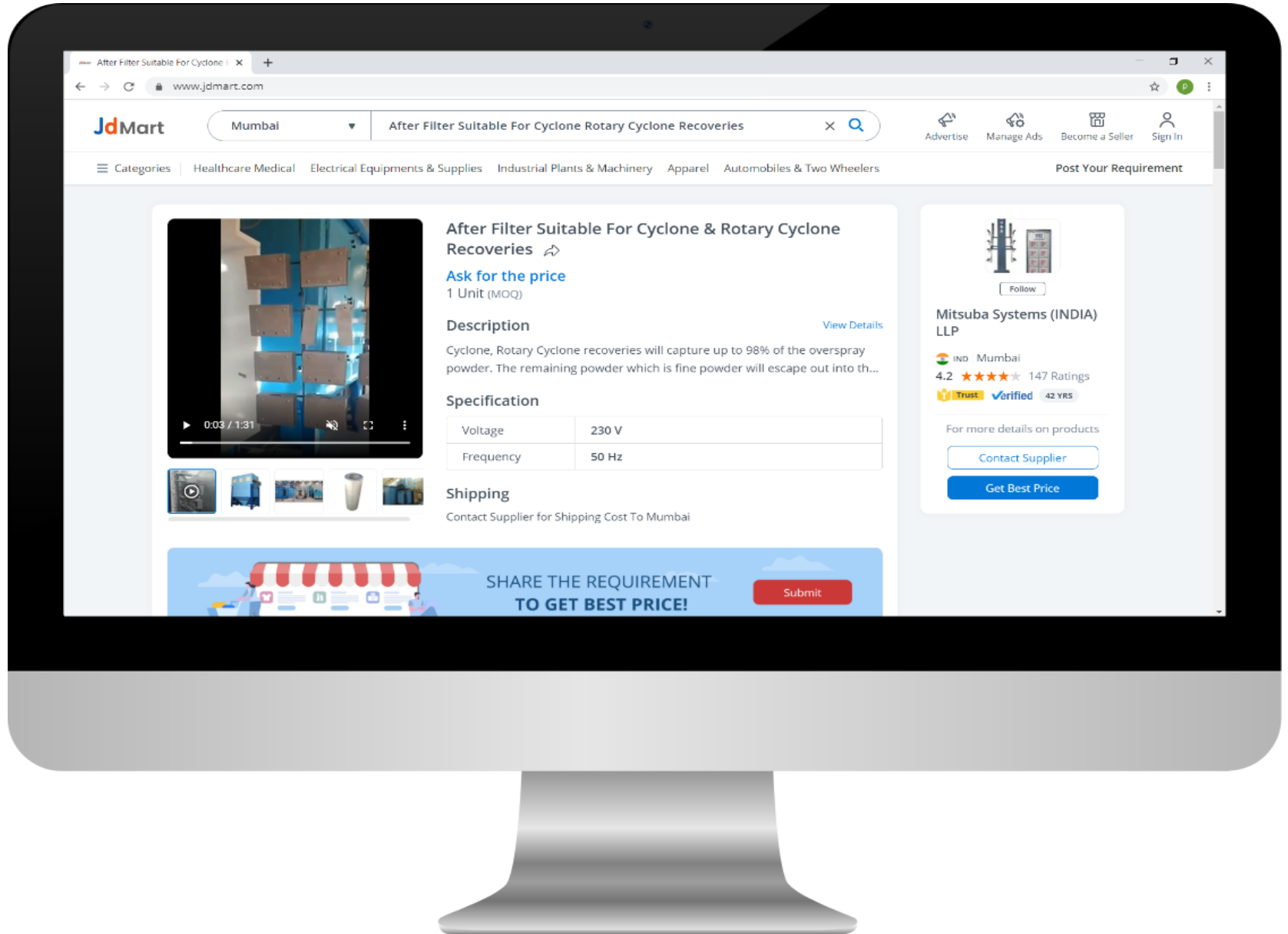
# JD Mart – Exclusive B2B Platform, a New Wholesale Experience



# JD Mart – Exclusive B2B Platform, a New Wholesale Experience



# JD Mart – Exclusive B2B Platform, a New Wholesale Experience



# JD MART – PRODUCT STACK

Product



Marketplace



Logistics



Lending

Buyers



Retailers



Business



Industrial  
Buyers



Turnkey Project  
Managers

Explore



Search



Discover



RFQ By  
Bulk Upload



RFQ By  
Product Name

Search



Auto  
Complete



Voice  
Search


























Barcode  
Scan



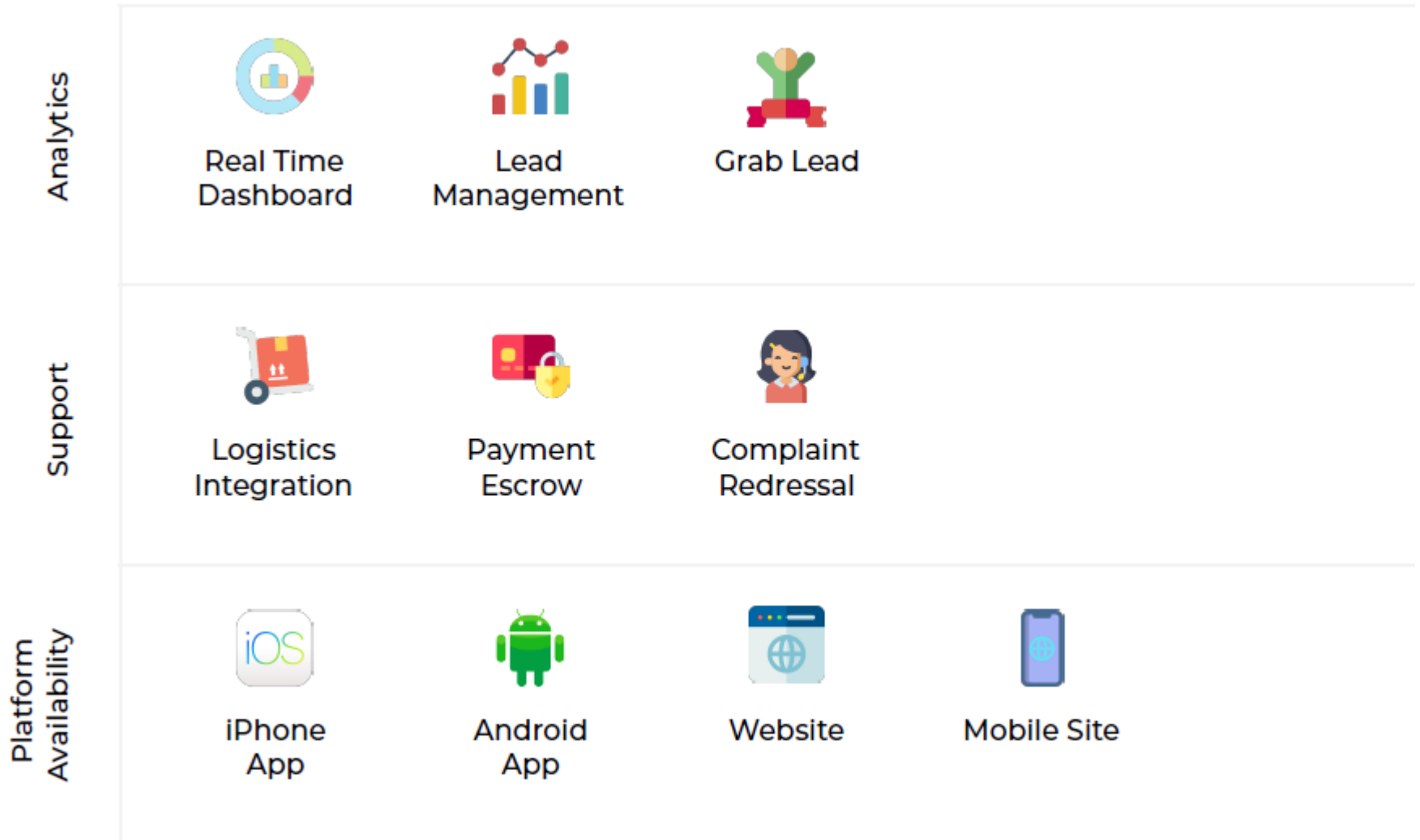
Image  
Search

# JD MART – PRODUCT STACK

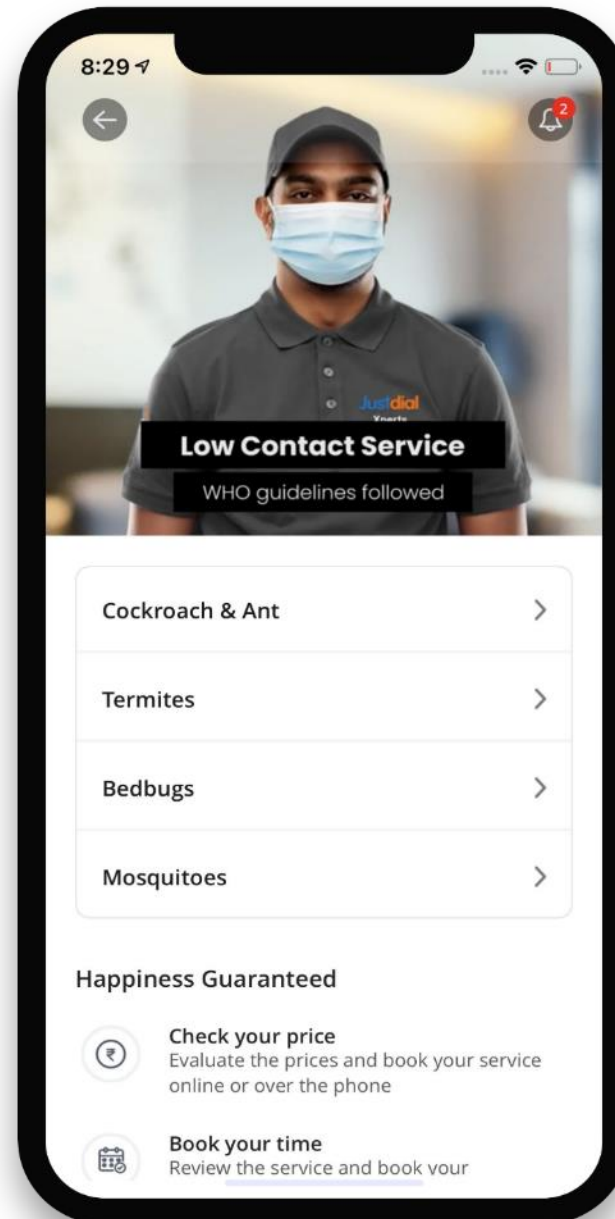
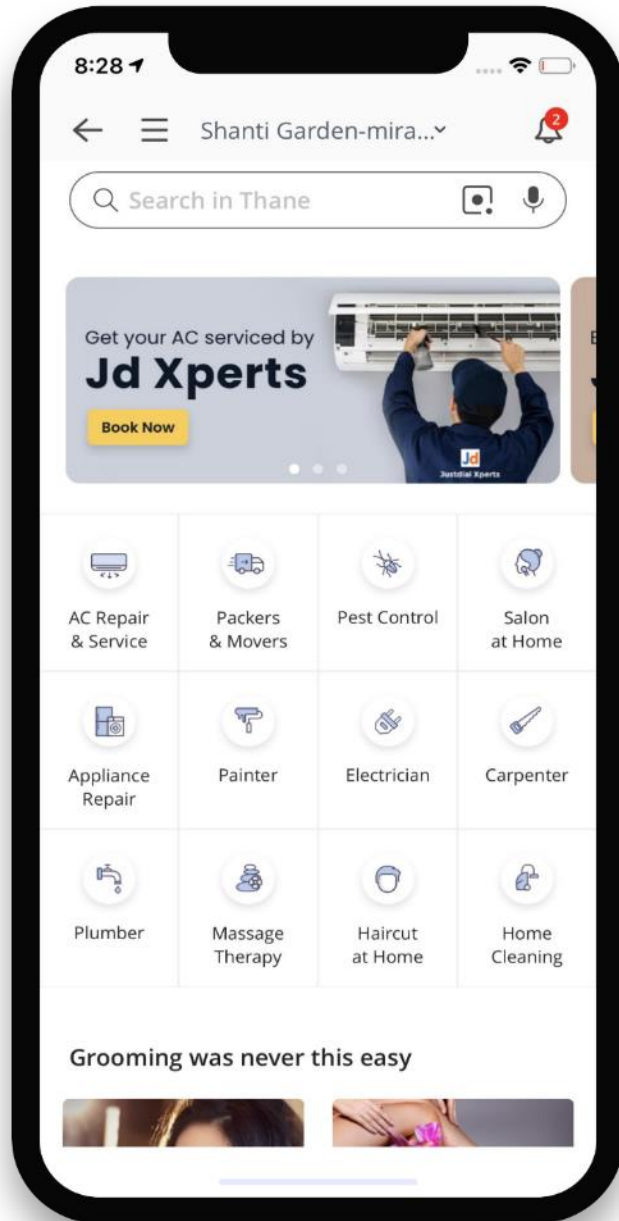
Content	 Product Catalogue	 Images	 Videos	 Specification	 Description	 Price	 MOQ	 Years in Business
Transact	 RFQ	 Buy Online	 Send Enquiry	 Call	 Chat	 Reverse Auction	 Web & App Notification	
Protection & Certification	 Jd Pay Escrow	 Verified	 Trust	 Trade Assurance				
Seller Tools	 Catalogue Management (Mobile & Desktop)		 Real Time Lead Management		 Manage RFQ		 Chat With Buyers	

# JD MART – PRODUCT STACK

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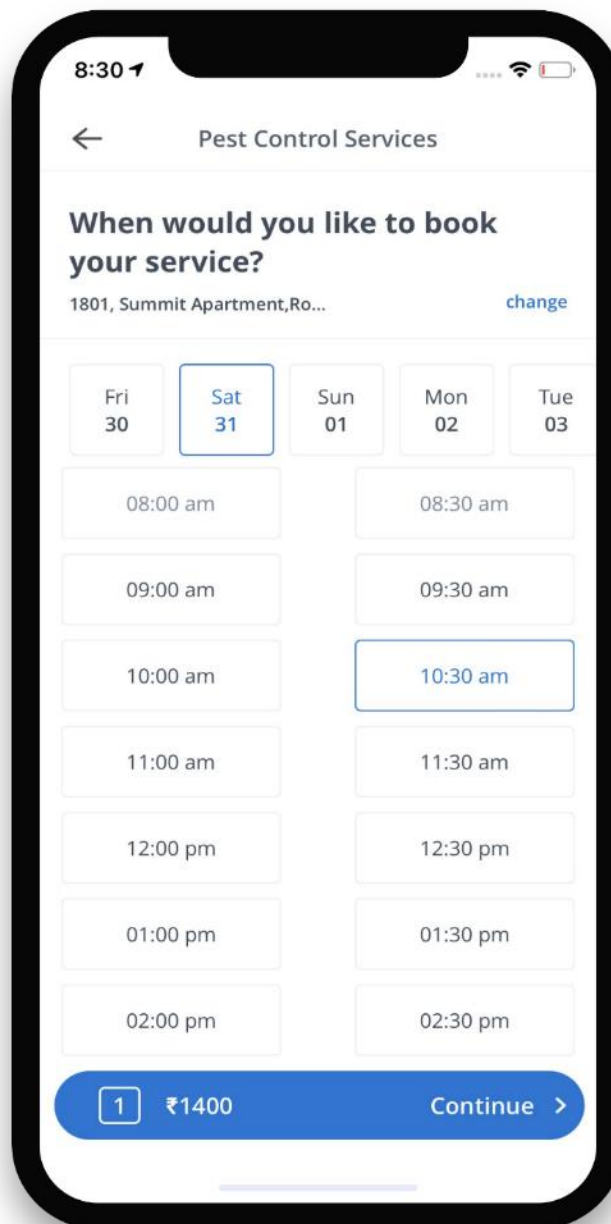
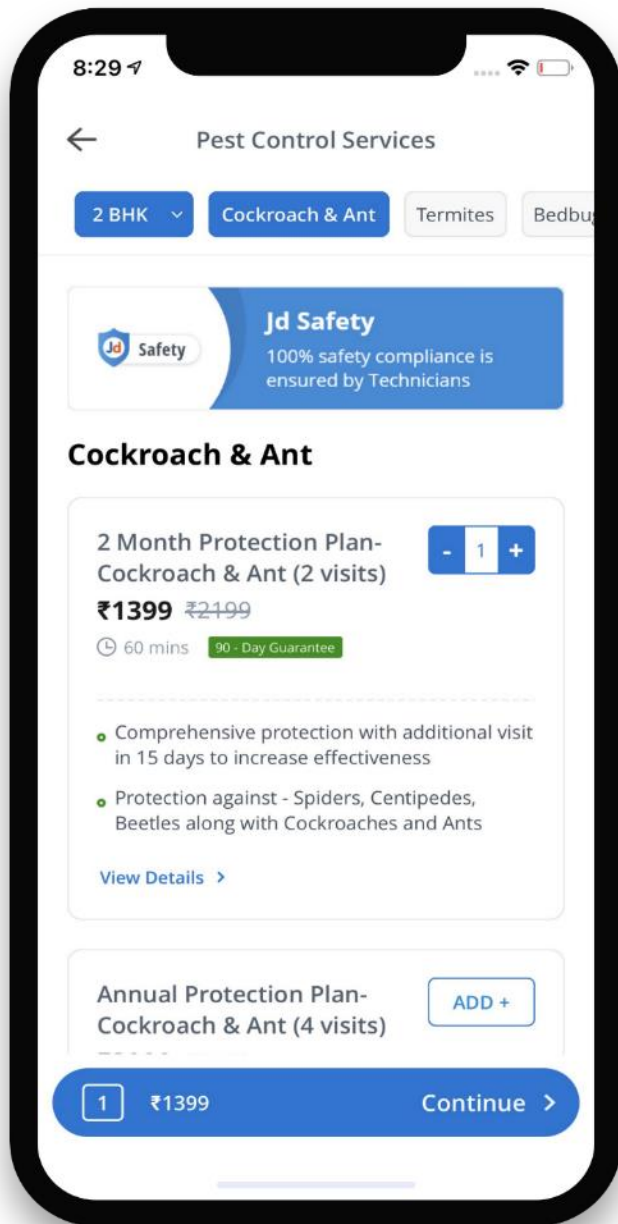


# JD XPERTS – ONE STOP SOLUTION FOR ON-DEMAND SERVICES

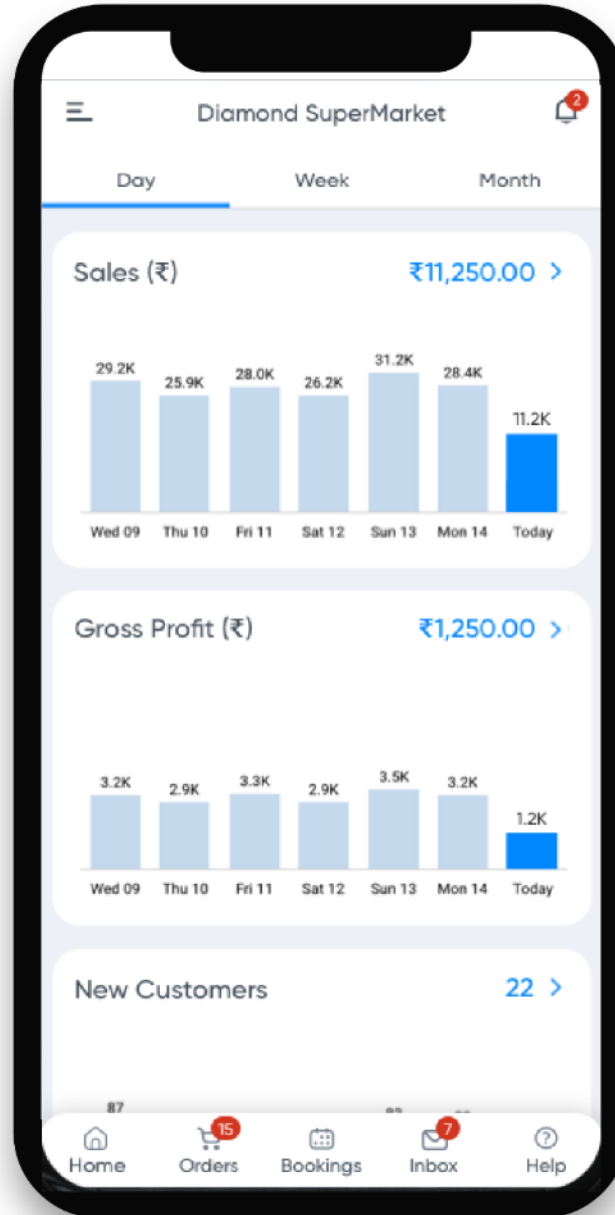
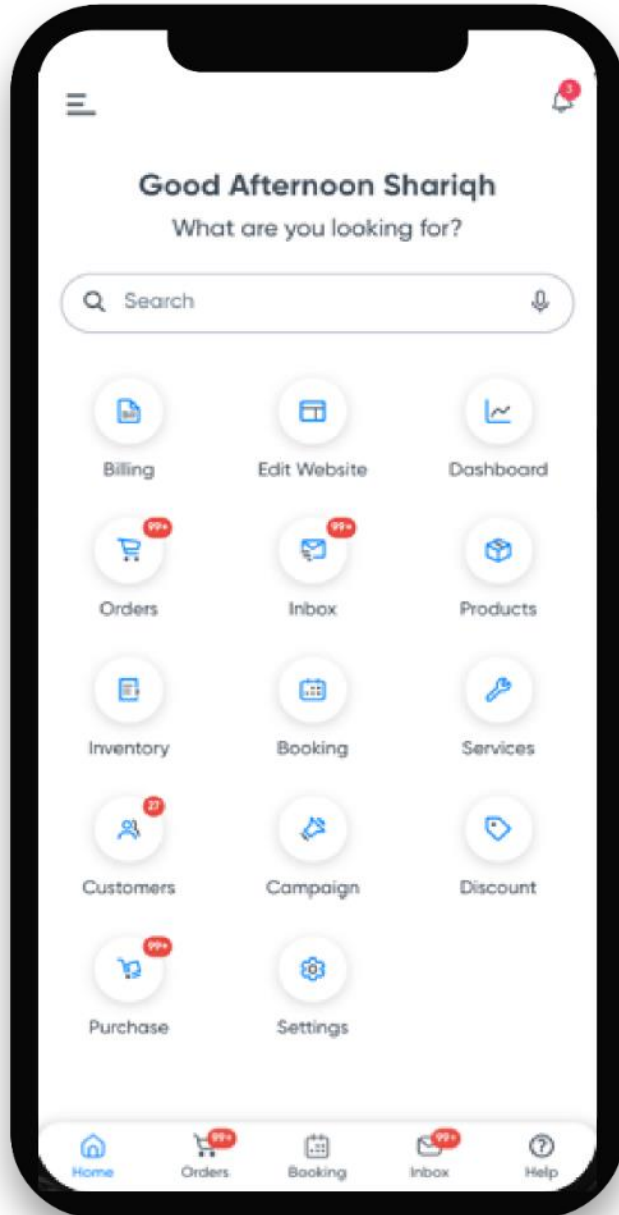




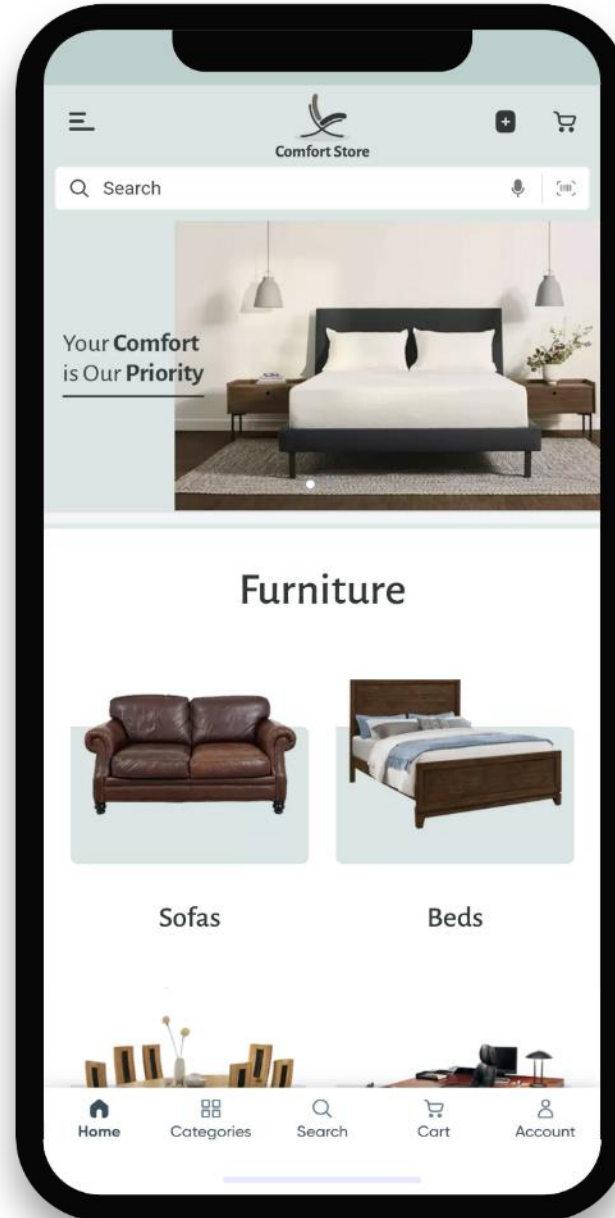
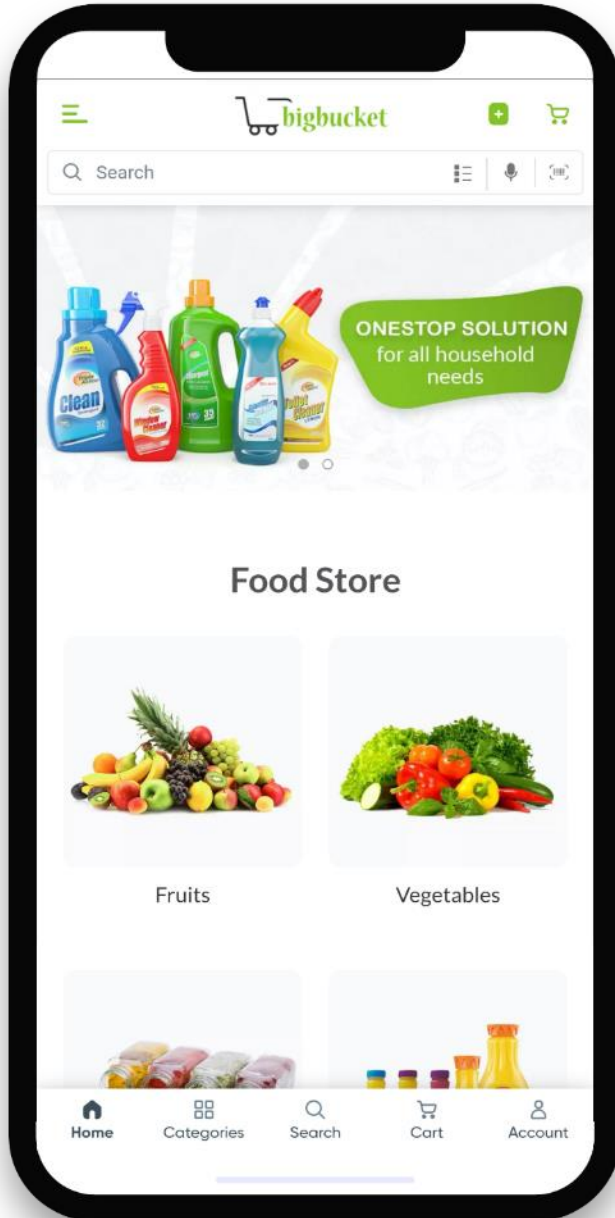
# JD XPERTS – ONE STOP SOLUTION FOR ON-DEMAND SERVICES



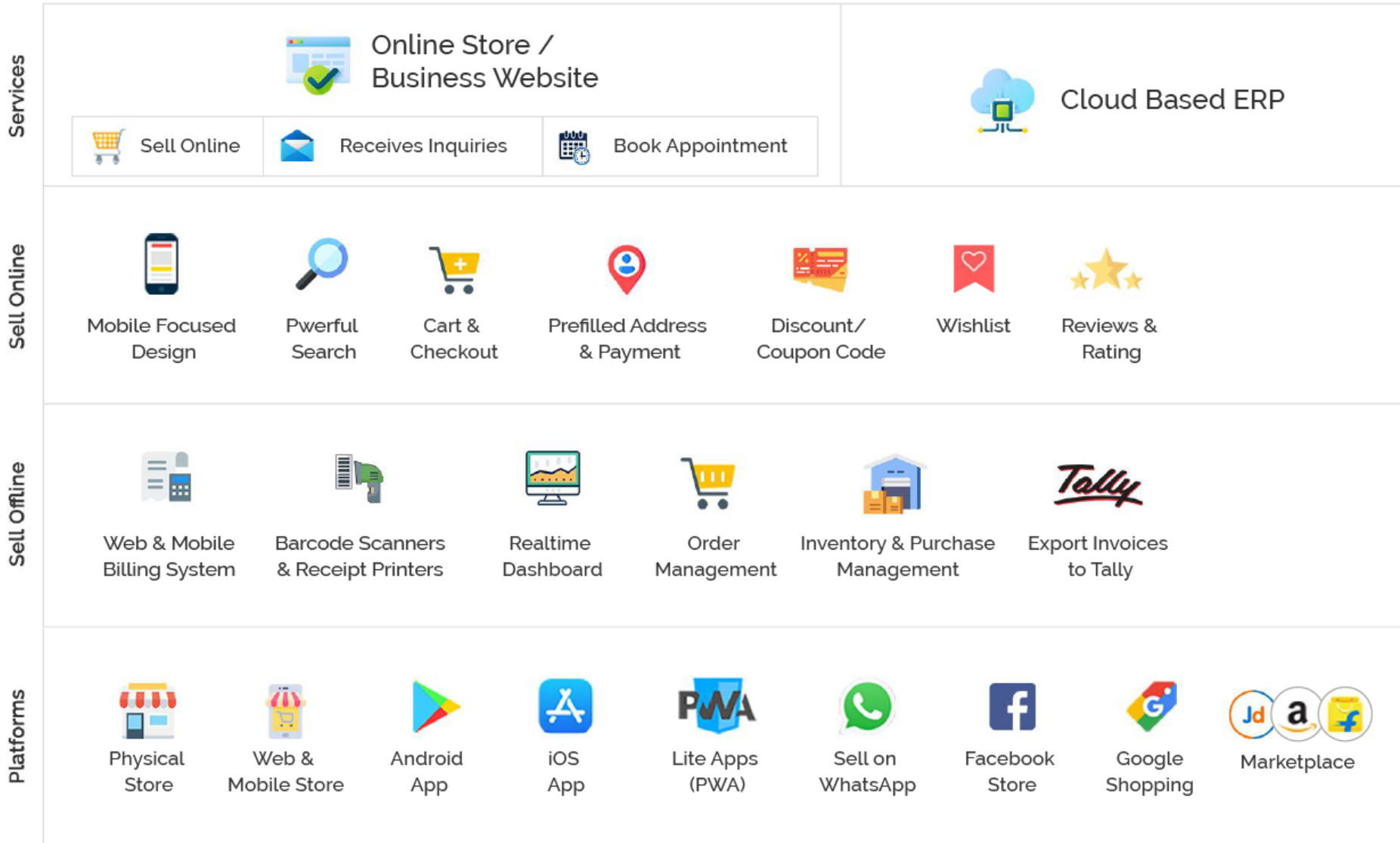
# JD Omni – Cloud-Hosted Solution for Digitalizing Businesses


























# JD Omni – Cloud-Hosted Solution for Digitalizing Businesses



# JD OMNI – PRODUCT STACK



# JD OMNI – PRODUCT STACK

Product Cataloguing	 Bulk Upload CSV	 Add Products via Barcode	 16 Million Product Catalogue Library	 Create Custom Product				
Payments	 Jd Pay	 UPI	 Credit Debit Card	 Wallets	 Net Banking	 COD	 Send Online Payment Links	 Store Credit (Khata)
Fulfilment	 Shipyaari (Couries Aggregator)	 Swiggy Genie Integration	 Dunzo Hyperlocal	 Local Delivery Boy	 Buy Online, Pickup in Store			
Communication	 WhatsApp	 Email	 SMS	 App Notification	 Browser Notification	 Chat		



## FINANCIAL OVERVIEW

# EFFICIENT & PROFITABLE BUSINESS MODEL

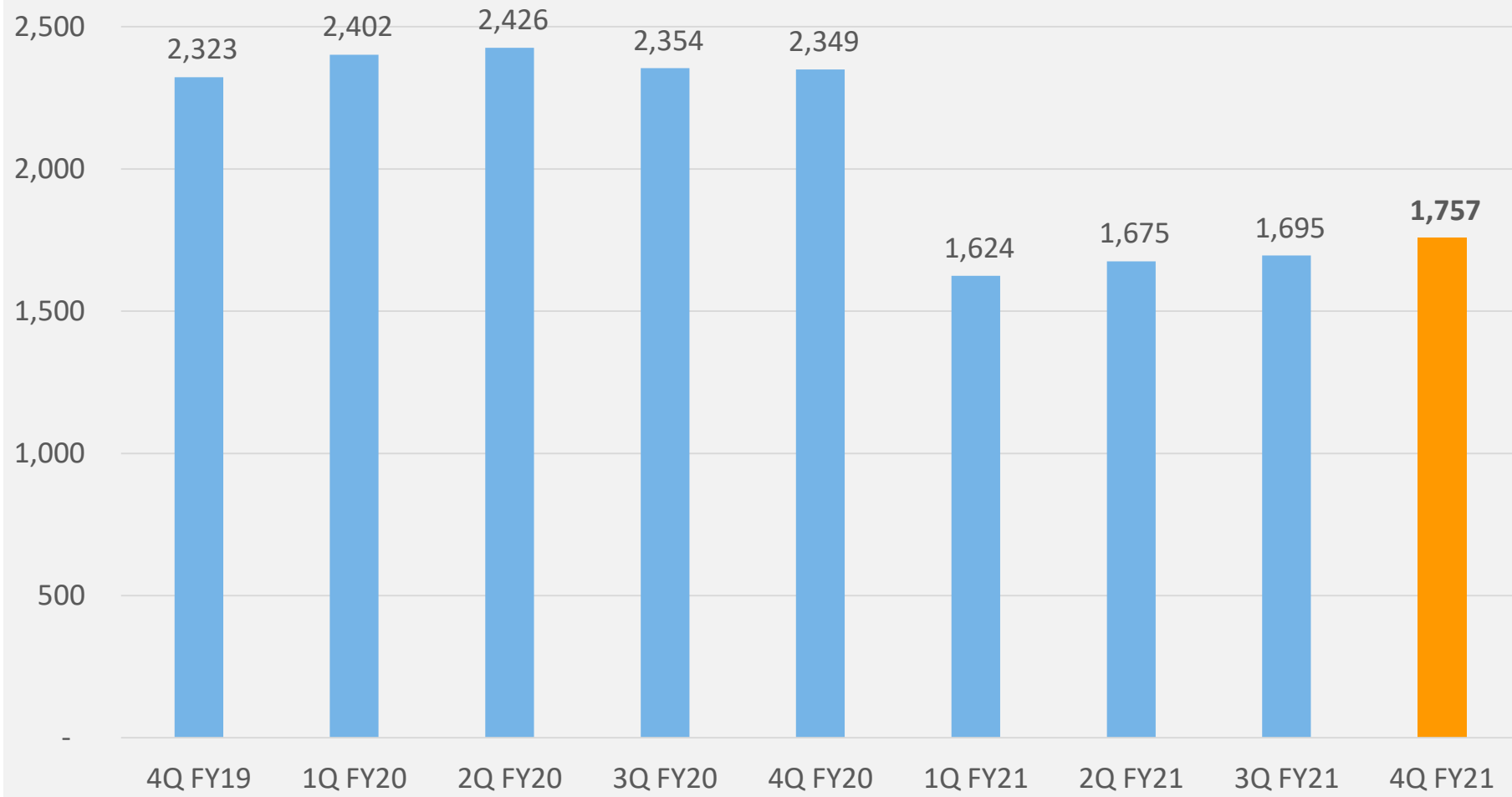
- Paid Advertisers pay a fixed fee to run searched advertising campaigns for their businesses on Justdial's platforms
- Various premium & non-premium listing packages available which determine placements in search results
- Multiple factors determine pricing, such as business categories of advertiser, geographies targeted, type of package
- Add-on products such as banners, own website, JD Pay, JD Ratings, etc. available
- Advertisers can pay amounts either upfront or through monthly payment plans, with ability to manage campaigns online
- Justdial also runs multi-city/ national campaigns for pan-India advertisers
- Sales team comprises of 3,464 employees in tele-sales, 1,298 feet-on-street (marketing), and 3,531 feet-on-street (JDAs - Just Dial Ambassadors, cold calling team) as on Q4 FY21



KEY  
BUSINESS  
ATTRIBUTES

# REVENUE

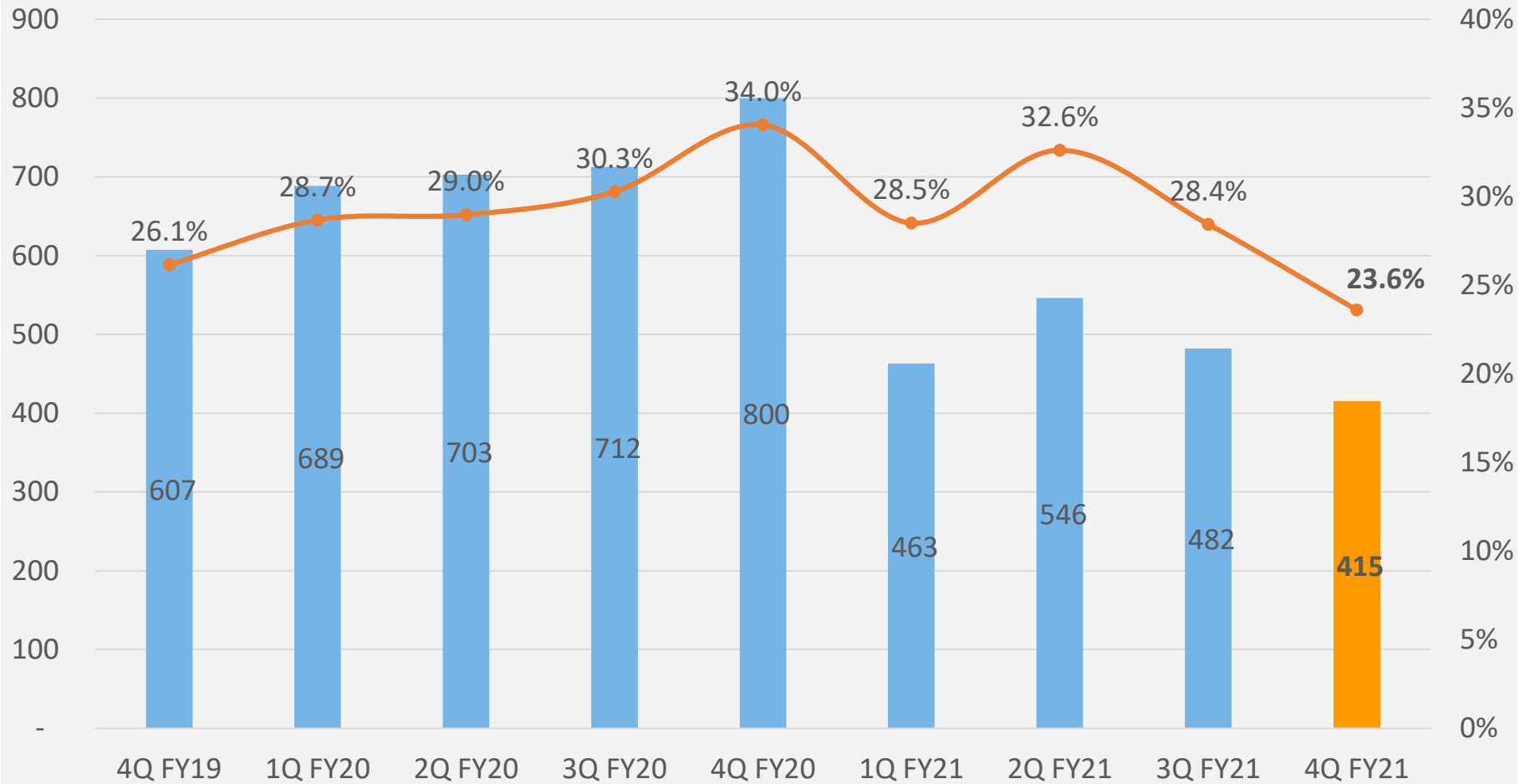
## Operating Revenue (Rs million)





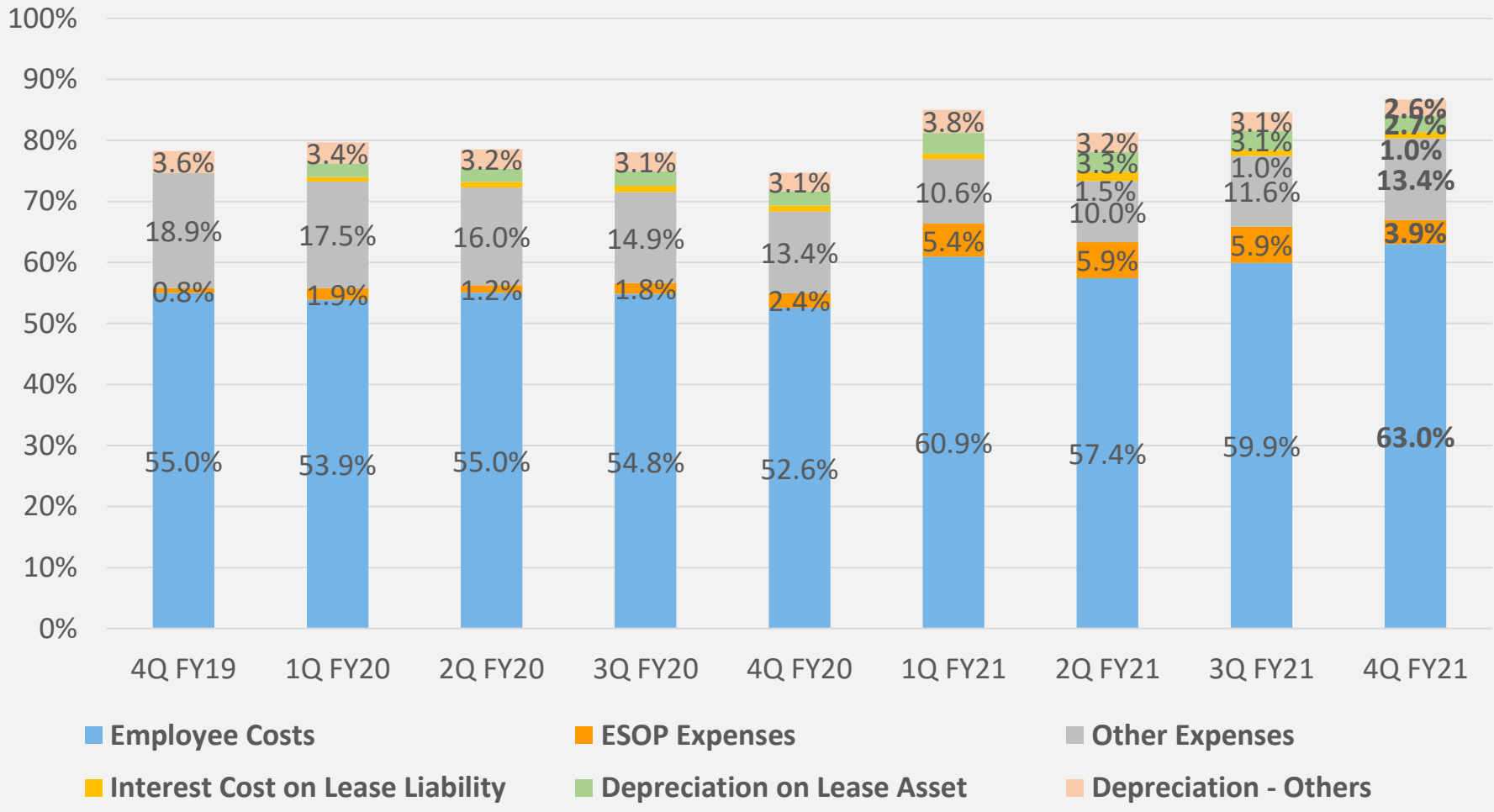
# OPERATING MARGIN

## Adjusted EBITDA (Rs million) & Margin %



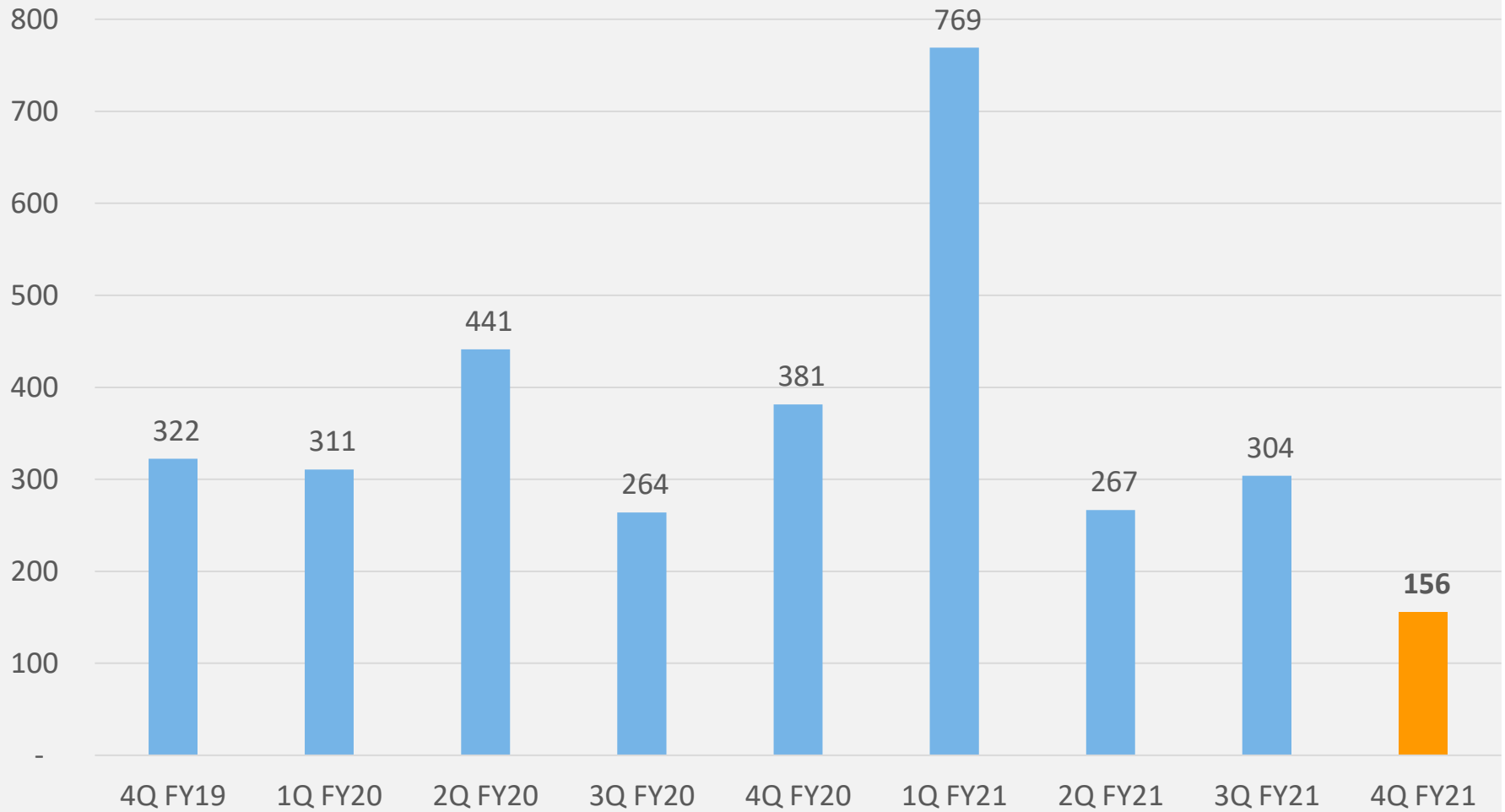
# COST STRUCTURE

## Expenses as % of Operating Revenue

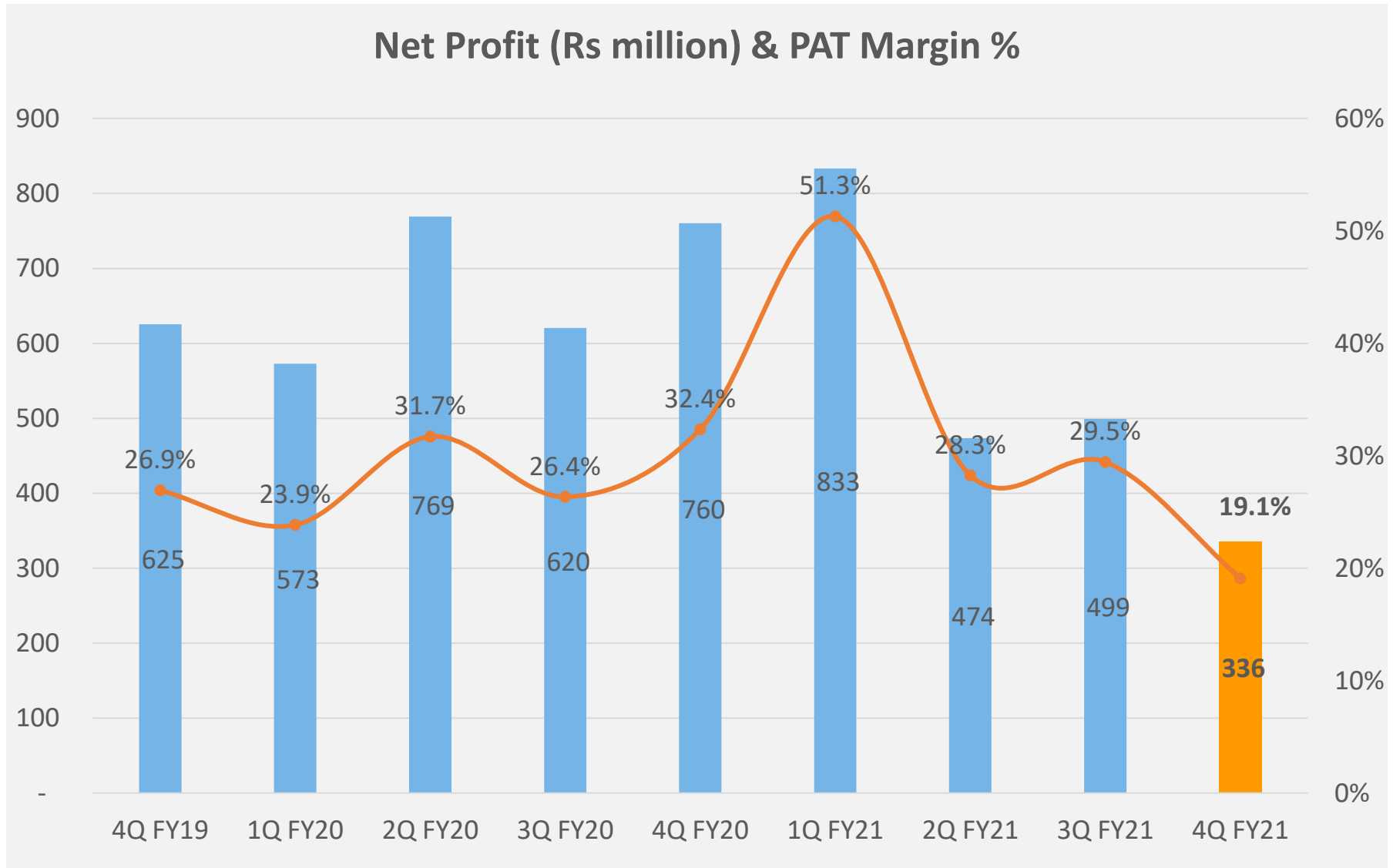


## OTHER INCOME

Other Income (Rs million)



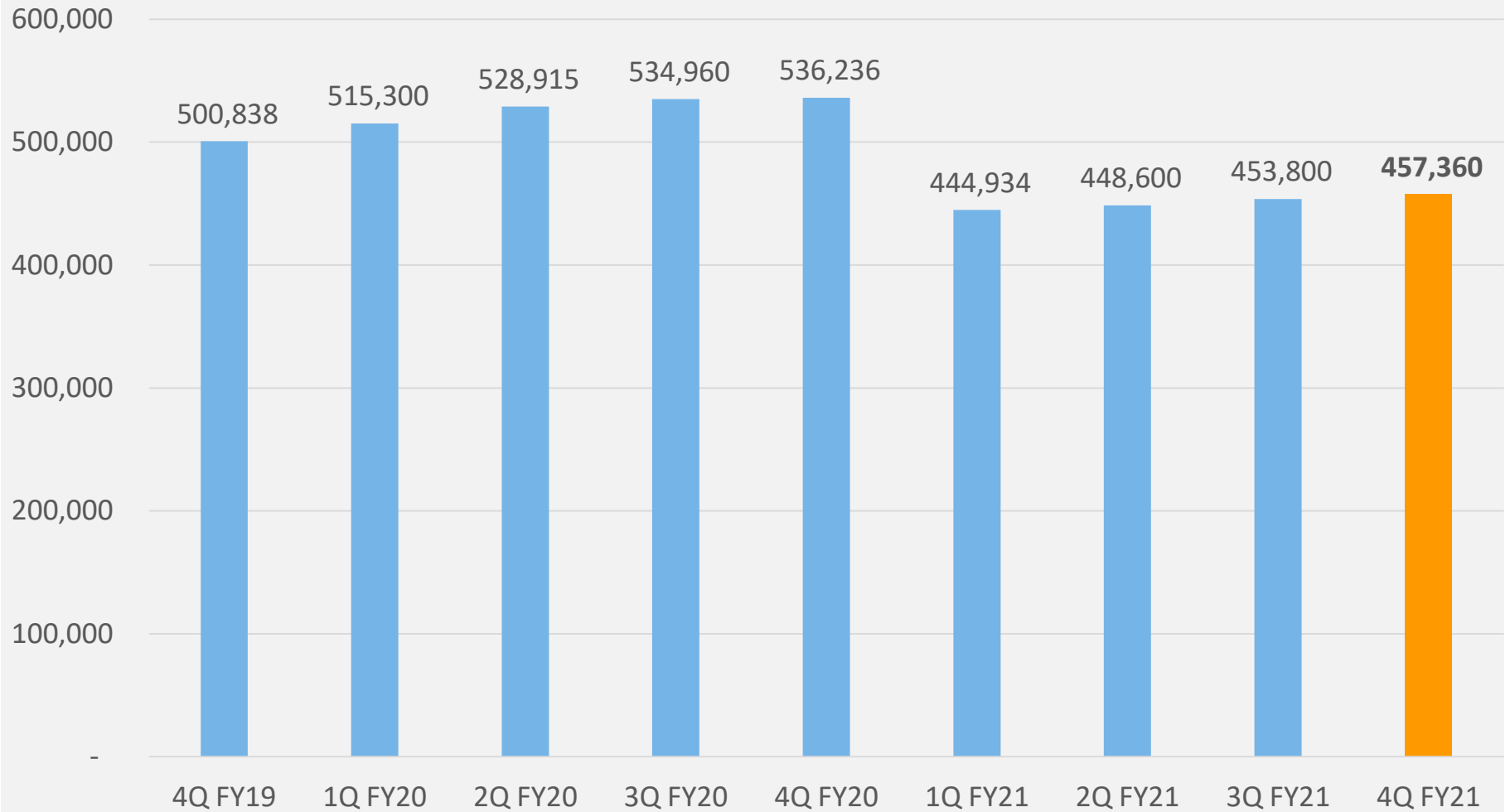
# NET PROFIT MARGIN



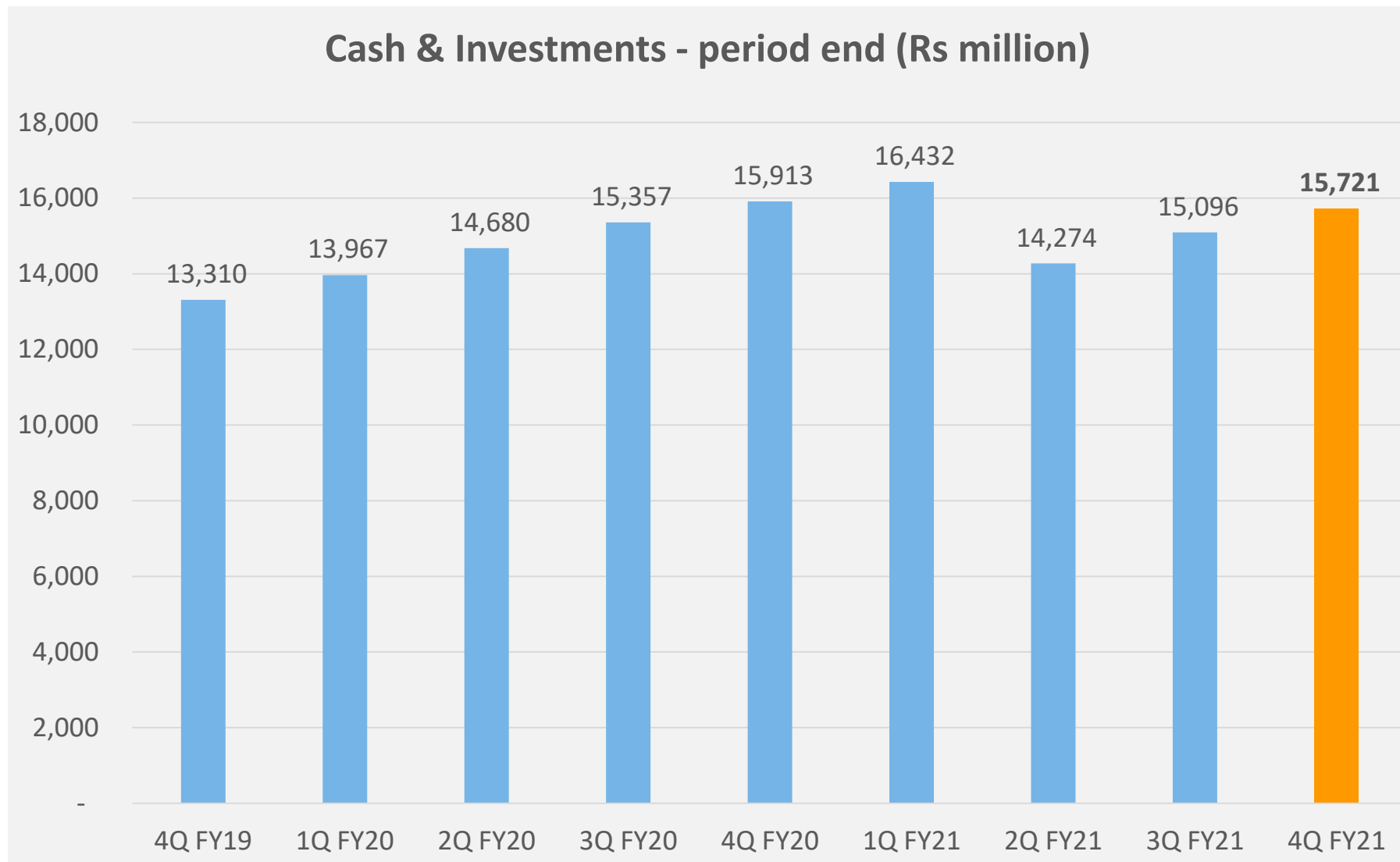
Note: PAT Margin is calculated as Net Profit (Profit After Taxes) as a percentage of Operating Revenue for the quarter.

# PAID CAMPAIGNS

## Active Paid Campaigns - period end



## CASH AND INVESTMENTS

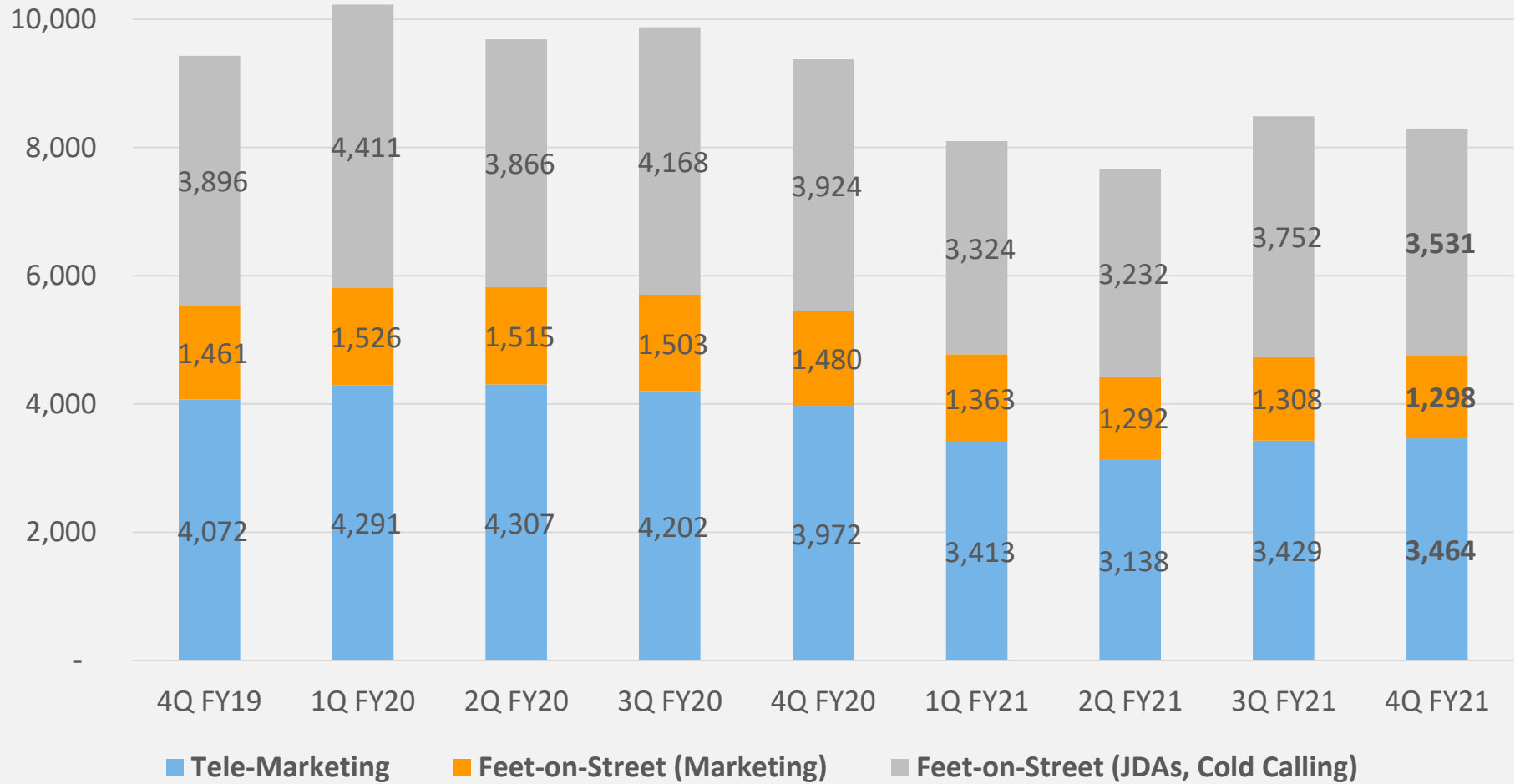


Note: 2018 Buy-back for Rs2.2bn was concluded/ paid in 4Q FY19

2020 Buy-back for Rs2.2bn, along with Buy-back Tax of Rs0.51bn, was concluded/ paid in 2Q FY21

# SALES FORCE

## Sales Strength - Period End



**JUST DIAL LTD - 4Q FY21 (Quarter ended March 31, 2021) PERFORMANCE SUMMARY**

Metric	Unit	4Q FY21	4Q FY20	YoY change	3Q FY21	QoQ change
Operating Revenue	(₹ million)	1,757	2,349	-25.2%	1,695	3.6%
Operating EBITDA	(₹ million)	345	743	-53.5%	381	-9.5%
Operating EBITDA Margin	%	19.7%	31.6%	-1,198 bps	22.5%	-284 bps
Adjusted EBITDA (excl. ESOP expenses)	(₹ million)	415	800	-48.1%	482	-14.0%
Adjusted EBITDA Margin (excl. ESOP expenses)	%	23.6%	34.0%	-1,043 bps	28.4%	-483 bps
Other Income, net	(₹ million)	156	381	-59.2%	304	-48.7%
Profit Before Taxes	(₹ million)	389	975	-60.1%	564	-31.0%
Net Profit	(₹ million)	336	760	-55.9%	499	-32.8%
Net Profit Margin	%	19.1%	32.4%	-1,326 bps	29.5%	-1,035 bps
Unearned Revenue (period end)	(₹ million)	3,303	3,360	-1.7%	3,053	8.2%
Cash & Investments (period end)	(₹ million)	15,721	15,913	-1.2%	15,096	4.1%



**JUST DIAL LTD - 4Q FY21 (Quarter ended March 31, 2021) PERFORMANCE SUMMARY**

<b>Metric</b>	<b>Unit</b>	<b>4Q FY21</b>	<b>4Q FY20</b>	<b>YoY change</b>	<b>3Q FY21</b>	<b>QoQ change</b>
Unique Visitors	(million)	<b>129.1</b>	138.9	-7.1%	132.6	-2.6%
- Mobile	(million)	<b>106.3</b>	111.2	-4.4%	108.3	-1.8%
- Desktop/ PC	(million)	<b>16.5</b>	21.1	-22.2%	17.9	-7.9%
- Voice	(million)	<b>6.3</b>	6.6	-3.9%	6.4	-1.2%
- Mobile	% share	<b>82.4%</b>	80.1%	231 bps	81.7%	66 bps
- Desktop/ PC	% share	<b>12.7%</b>	15.2%	-247 bps	13.5%	-73 bps
- Voice	% share	<b>4.9%</b>	4.7%	16 bps	4.8%	7 bps
Total Listings (period end)	(million)	<b>30.4</b>	29.4	3.5%	30.2	0.8%
Net Listings Addition		<b>246,774</b>	776,360	-68.2%	196,107	25.8%
Total Images in Listings (period end)	(million)	<b>103.6</b>	84.2	23.0%	99.6	4.0%
Listings with Geocodes (period end)	(million)	<b>17.3</b>	16.5	4.8%	17.2	0.9%
Ratings & Reviews	(million)	<b>117.8</b>	109.7	7.4%	114.7	2.7%
Paid campaigns (period end)		<b>457,360</b>	536,236	-14.7%	453,800	0.8%
Total App Downloads (period end)	(million)	<b>28.7</b>	26.6	7.7%	28.1	2.0%
App Downloads per day		<b>9,614</b>	10,120	-5.0%	9,604	0.1%
Number of Employees (period end)		<b>11,162</b>	12,423	-10.2%	11,387	-2.0%

**JUST DIAL LTD - FY21 (Fiscal Year ended March 31, 2021) PERFORMANCE SUMMARY**

Metric	Unit	FY21	FY20	YoY change	YoY% change
Operating Revenue	(₹ million)	6,752	9,531	-2,779	-29.2%
Operating EBITDA	(₹ million)	1,549	2,729	-1,180	-43.3%
Operating EBITDA Margin	%	22.9%	28.6%		-570 bps
Adjusted EBITDA (excl. ESOP expenses)	(₹ million)	1,906	2,903	-997	-34.4%
Adjusted EBITDA Margin (excl. ESOP expenses)	%	28.2%	30.5%		-223 bps
Other Income, net	(₹ million)	1,495	1,397	98	7.0%
Profit Before Taxes	(₹ million)	2,547	3,516	-970	-27.6%
Net Profit	(₹ million)	2,142	2,723	-581	-21.3%
Net Profit Margin	%	31.7%	28.6%		315 bps
Unearned Revenue (period end)	(₹ million)	3,303	3,360	-58	-1.7%
Cash & Investments (period end)	(₹ million)	15,721	15,913	-192	-1.2%

# BOARD OF DIRECTORS

## EXECUTIVE DIRECTORS

### V S S Mani

Founder, Managing Director and Chief Executive Officer of Justdial with over 33 years of experience in the field of media and local search services.

### V Krishnan

Whole-time Director with 28 years of experience, working with Justdial in strategic planning and execution.

### Abhishek Bansal

CFO and whole-time Director of Justdial, with overall 12 years of experience and handles Finance, Strategy, Accounting, Treasury, Audit, Legal, Compliance & Traffic. He holds an MBA from IIM Bangalore and a B. Tech. in Electrical Engineering from IIT Roorkee.

## NON-EXECUTIVE DIRECTORS – INDEPENDENT

### B Anand

Anand is CEO of Nayara Energy, and previously was CFO of Trafigura. He has 34 years of experience in Corporate Finance, Strategy & Investment Banking. He is a Commerce graduate and an associate member of ICAI.

### Sanjay Bahadur

Sanjay is CEO of Pidilite Industries for its Global Constructions & Chemicals division and has 37 years of experience. He holds a degree from Delhi College of Engineering.

### Malcolm Monteiro

Malcolm is serving on Justdial Board since August 02, 2011 and was previously CEO India, DHL eCommerce & was also a member of DHL eCommerce Management Board. He holds a degree from IIT Mumbai & IIM Ahmedabad.

### Bhavna Thakur

Bhavna heads Capital Markets at Everstone Capital and has over 23 years of experience in Corporate Finance, Investment Banking, M&A and Capital Markets. She holds a BA LLB (Hons.) from NLSIU, Bangalore & a Masters in Law from Columbia University, New York.

## NON-EXECUTIVE DIRECTORS – NON-INDEPENDENT

### Pulak Prasad

Pulak is Founder & MD of Nalanda Capital and has over 29 years of experience in Management Consulting & Investing. He holds a B. Tech. from IIT Delhi and is an IIM Ahmedabad alumni.

### Anita Mani

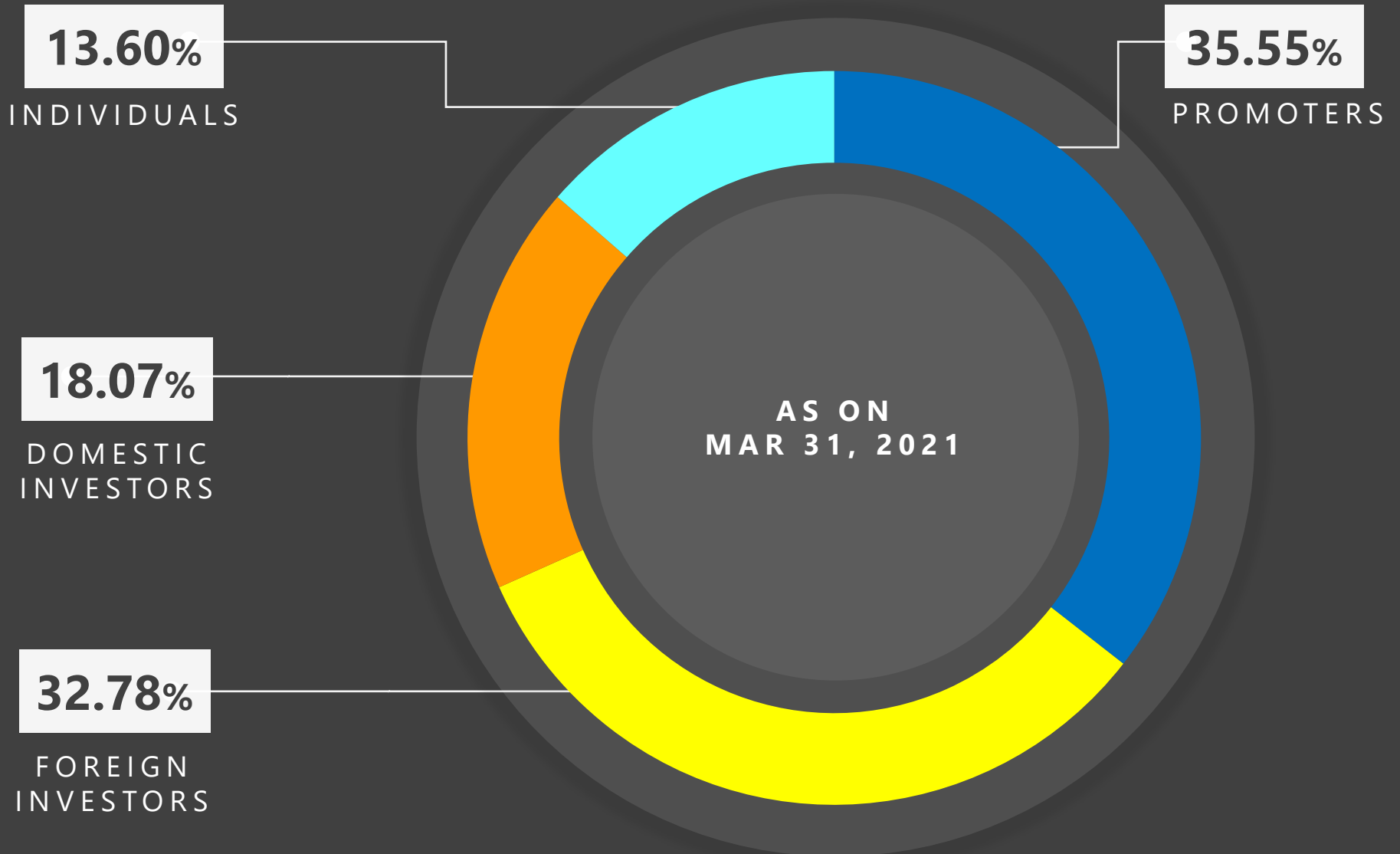
Anita has 28 years of experience in the field of General Management. She is a history graduate from University of Delhi.

## LEADERSHIP TEAM

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Name	Designation	Experience	Functional Areas
<b>V S S Mani</b>	Chief Executive Officer	33 Years	Overall growth strategy, planning, execution & management
<b>Abhishek Bansal</b>	Chief Financial Officer	12 Years	Finance, Strategy, Accounting, Treasury, Audit, Legal, Compliance & Traffic
<b>Vishal Parikh</b>	Chief Product Officer	21 Years	Leads Product, Design & Technology teams, and Voice Operations
<b>Sumeet Vaid</b>	Chief Revenue Officer	25 Years	Revenue growth & Business development
<b>Rajesh Madhavan</b>	Chief People Officer	25 Years	Human Resource Functions
<b>Ajay Mohan</b>	Group Vice President, Sales	25 Years	Sales platform management, Strategic alliances, Corporate partnerships & Business expansion
<b>Rakesh Ojha</b>	Group Vice President, Sales	26 Years	Sales & Expansion (West & South Region)
<b>Prashant Nagar</b>	Vice President, Sales	22 Years	Sales & Expansion (Delhi, Just Dial Ambassadors)
<b>Suhail Siddiqui</b>	Vice President, Sales	25 Years	Sales & Expansion (North & East Region)
<b>Rajiv Nair</b>	Vice President, Sales	23 Years	Sales & Expansion (South Region)
<b>Shwetank Dixit</b>	VP & Head, Database & Content	10 Years	Database Augmentation, Curation & Content enrichment; Traffic (Organic & Inorganic)

# SHAREHOLDING PATTERN



END OF PRESENTATION