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# Agenda

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Q2FY21 Earnings Highlights



**Company Overview** 

**Industry Overview** 



The Quick Heal Advantage



Q2FY21 Earnings



# Q2 & H1FY21 Earnings Highlights

As the economy slowly starts coming out of the lockdown, we are seeing improvement in demand on Retail as well as on Enterprise side. We continue to remain cautiously optimistic in the current uncertain environment.



**Q2FY21** Revenue at

₹**844** mln

up 15%from ₹ 735 mln in Q1FY21

**H1FY21** Revenue at

₹1,579 mln

up 1.1% from ₹ 1,562 mln in H1FY20

**H1FY21** Revenue split





H1FY21 EBITDA at

₹712 mln

up 17.6% from ₹ 606 mln in H1FY20

EBITDA margin at

45.1%

in H1FY21 up 632 bps from 38.9% in H1FY20

#### PAT

H1FY21 PAT at

₹538 mln

up 10.6% from ₹ 486 mln in H1FY20

PAT margin at

34.1%

In H1FY21 up 293 bps from 31.1% in H1FY20

# Average revenue per licence for H1FY21:

**Retail** at

477

Down 8.8% from H1FY20

**Enterprise** at

**₹679** 

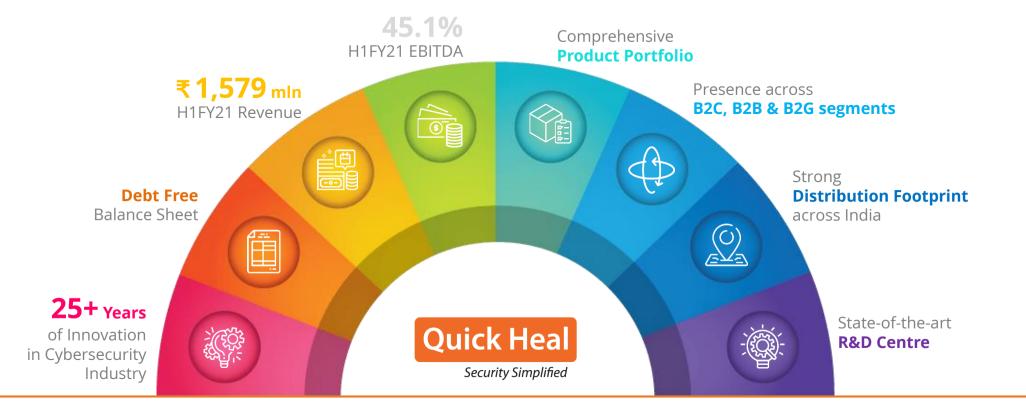
Up 5.8% from H1FY20

New enterprise customers with more than 500 users added in FY21:

222	>=500 to <=999	>=1,000 to <=4999	Total
Q1	3	0	3
Q2	14	5	19



# Company at a glance



#### **Vision**

To be the trusted global leader in securing the digital world

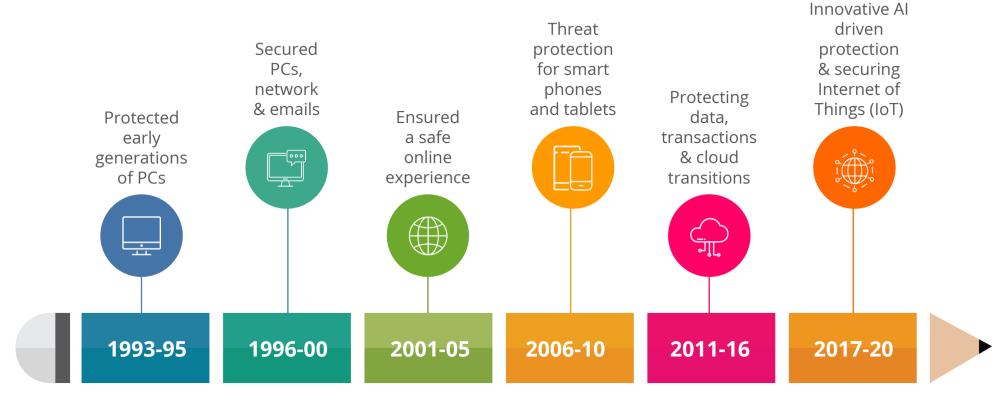
#### **Mission**

Secure our customers by providing innovative, most preferred and valued security solutions, services and knowledge

Protect information and interactions on all types of networks, devices & things globally

Build a healthy business and organization

# Our journey



# Over 25 years of simplifying security

Scripting a new success story In the cybersecurity industry

# **Quick Heal**





₹ 1,435 mln H1FY21 Revenue\*





















₹ 284 mln H1FY21 Revenue\*

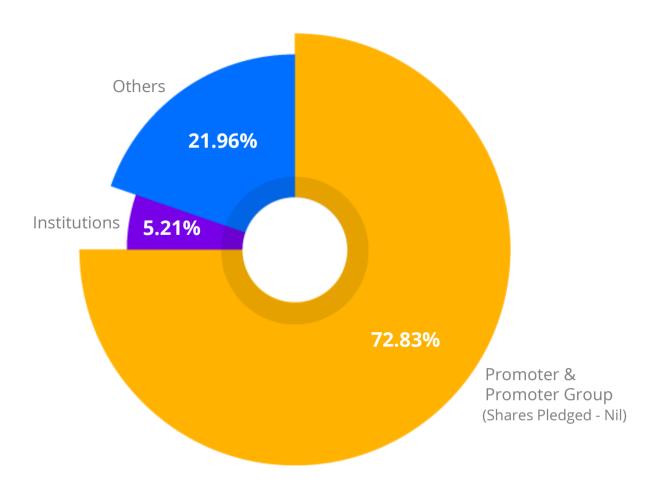


\*Based on net revenues before adjusting for sales incentives

- India's first listed cybersecurity products company
- A "Make in India" product configured to secure countries. cities and companies
- Quick Heal undisputed leader in the retail segment
- Segrite making inroads in the SMB & enterprise segment
- Quick Heal Security Labs a team of highly efficient security researchers, analysts engineers leverages combination of Al, cloud and patented technologies deliver timely and advanced protection
- Solutions to secure across platforms

# Shareholder information

#### **Shareholding structure – 30th September 2020**



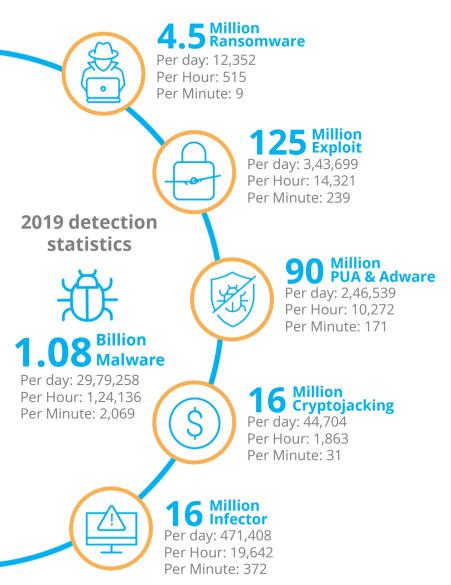
# **Shareholder Information** (as on 30<sup>th</sup> September 2020)

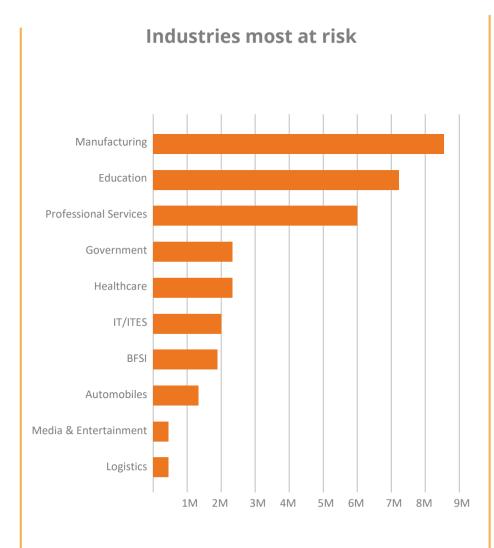
NSE Ticker	QUICKHEAL
BSE Ticker	539678
Market Cap (INR mln)	10,147
% Free-float	27.17%
Free-float market cap (INR mln)	2,757
Total Debt (INR mln)	-
Cash & Cash Equivalents (INR mln)	4,479
Shares Outstanding	6,42,03,618
3M ADTV (Shares)*	8,00,873
3M ADTV (INR mln)*	109.3
Industry	IT Software Products

<sup>\*</sup>Source: NSE



# 2019 Cyber threat landscape shows that...





#### States most affected High <sup>1</sup> Maharashtra Delhi NCR West Bengal Karnataka Gujarat Uttar Pradesh Tamil Nadu Rajasthan Telangana Madhya Pradesh Haryana Kerala Odisha Andhra Pradesh Bihar Punjab Himachal Pradesh Uttarakhand Chandigarh Kashmir

Chhattisgarh

Assam

Goa

Low

Iharkhand

Source: Quick Heal Annual Threat Report 2020 Source: Segrite Threat Report 2020

# ...cyber-attacks continue to grow in scale and sophistication...

#### **Detection statistics for Mobile**

Malware: 639K Per Day: 1.752 Per Hour: 73 Per Minute: 1.22

Adware: 125K Per Dav: 344 Per Hour: 14 Per Minute: 0.24





The Average cost of a data breach in India. An increase of 9.4% from 2019

Cyber-attacks that grabbed headlines **NEW** 

Segrite uncovers a new APT targeting India's defence forces - dubbed as 'Operation SideCopy'

> Dr Reddy's Laboratories has shut all its key plants across the world due to a data breach

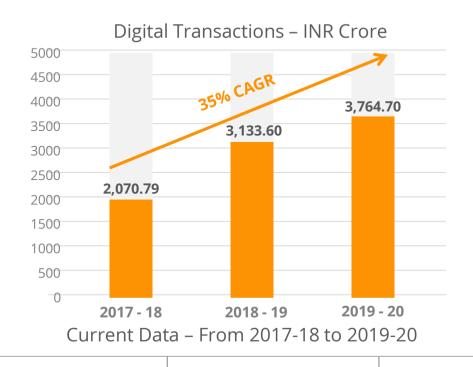
Haldiram's witnessed a ransomware attack on its servers by unidentified hackers who have allegedly stolen crucial data and demanded a ransom of \$7,50,000

Ransomware attacks double in Q2 2020: Segrite

Cyber crimes in India caused ₹ 1.25 lakh cr loss last year

PTI services disrupted after massive attack on servers

# ...together with rapid growth in India's digital adoption...



India in Numbers



720<sub>million+</sub> Internet users



**Smartphone users** 



People enrolled in the world's largest unique digital

identity program



48,48% Internet penetration in India in 2019



Users engaged in social media



Average Wireless Data Usage per wireless data subscriber per month in 2019

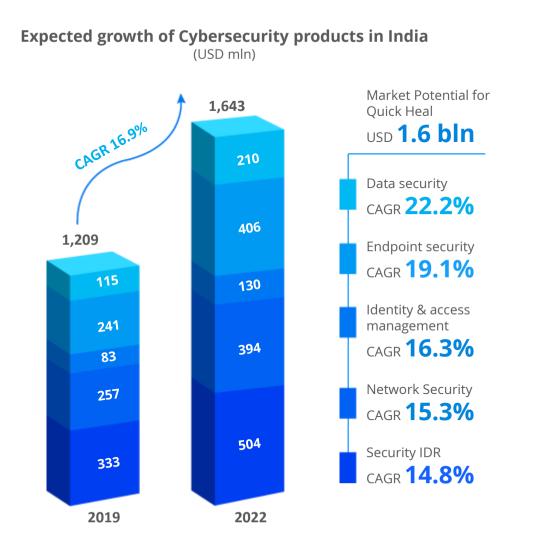


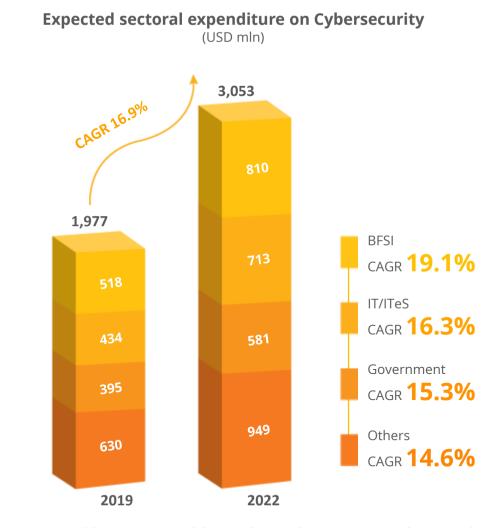
**Application** downloads in 2019



Rs.**6.98** Average cost to subscriber per GB wireless data

# ...is expected to increase Cybersecurity spending in India





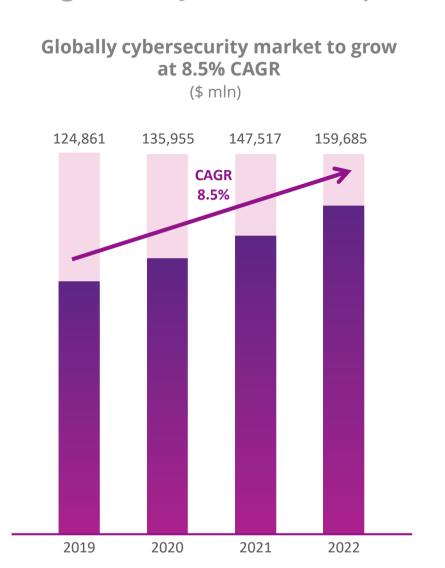
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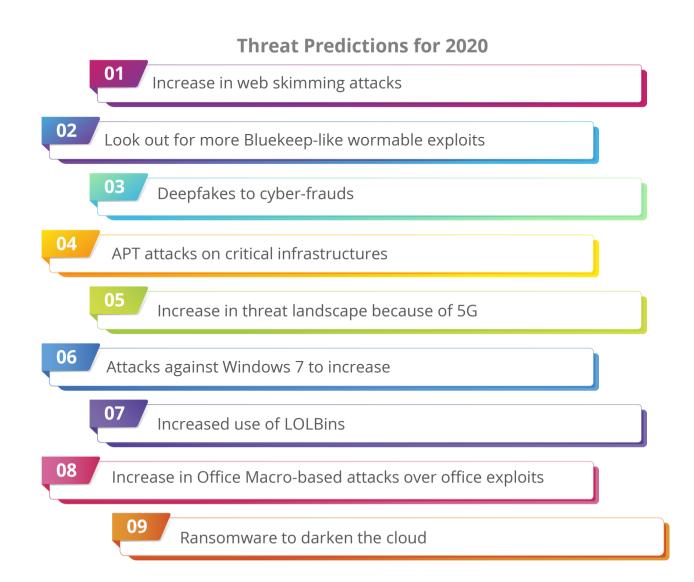
Cybersecurity market in India is expected to grow at ~16% CAGR between 2019 to 2022 and become a \$3 bln market with security product market estimated to grow at ~17% to become \$1.6 bln market. Quick Heal is well placed to capitalise on this opportunity.

Source: PWC & DSCI report – Cyber Security India Market

# Global cybersecurity market

# along with cyber threat predictions for 2020

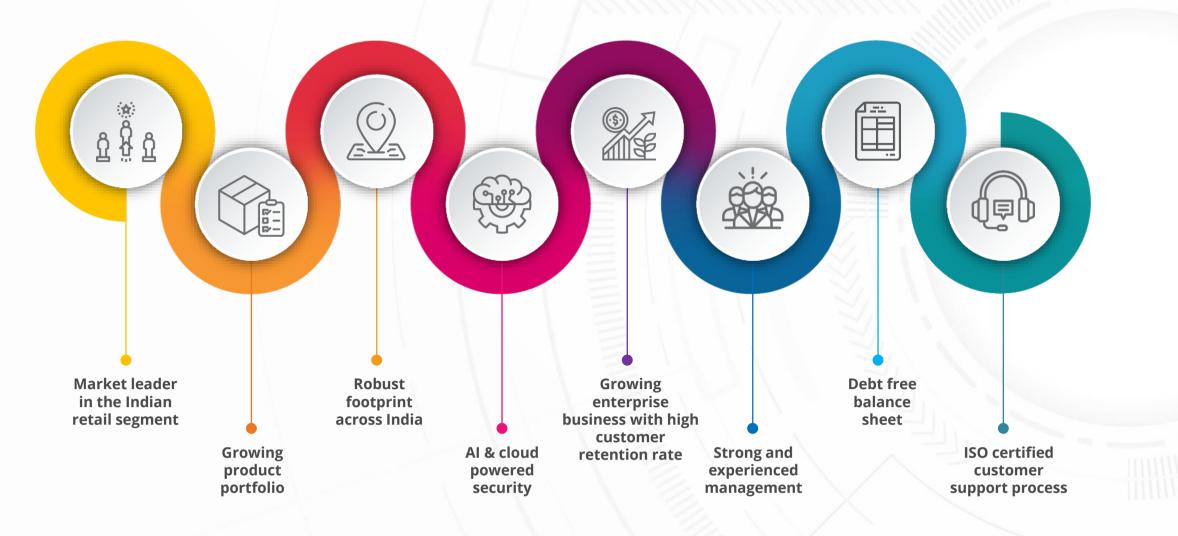




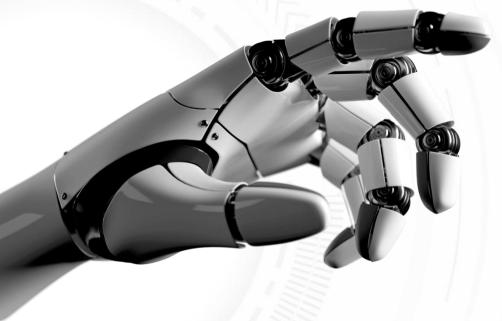
Source: Gartner Source: Segrite Threat Report 2020



# Quick Heal is well positioned to leverage its strengths to capture the future opportunities



# Strong threat detection and prevention capabilities...





#### Powers SIGNATURE-LESS and SIGNATURE-BASED detections

Our best and the most innovative malware hunting engine brings together the best of the best!





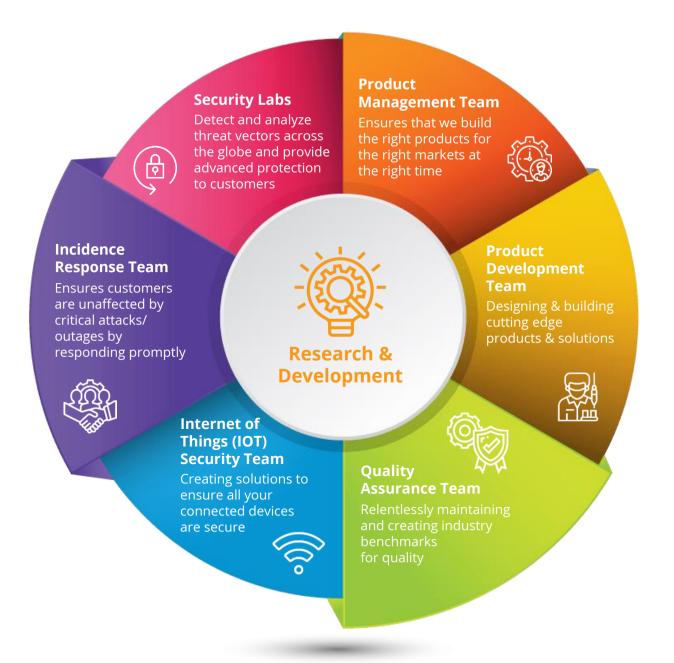




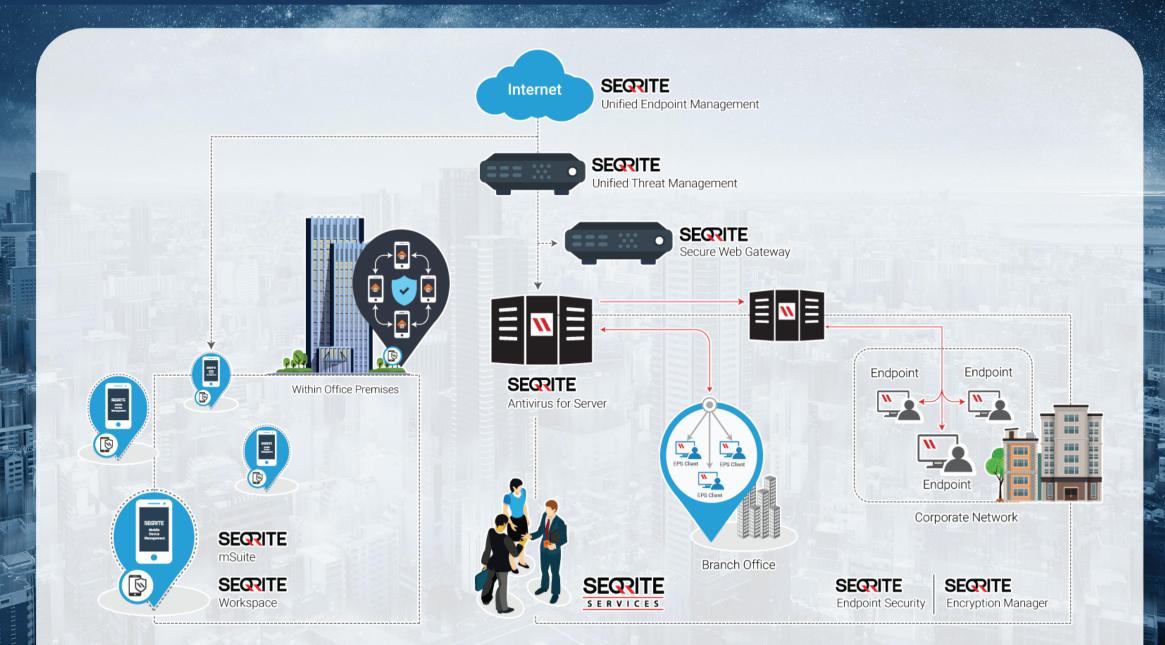


# Research & Development leading to Innovations

25+ years of experience coupled with vast distribution network across India has helped us understand security market and issues faced by millions of users in depth which has led to consistent introduction of innovative products and solutions for our customers



# Product Portfolio - Enterprise & Government



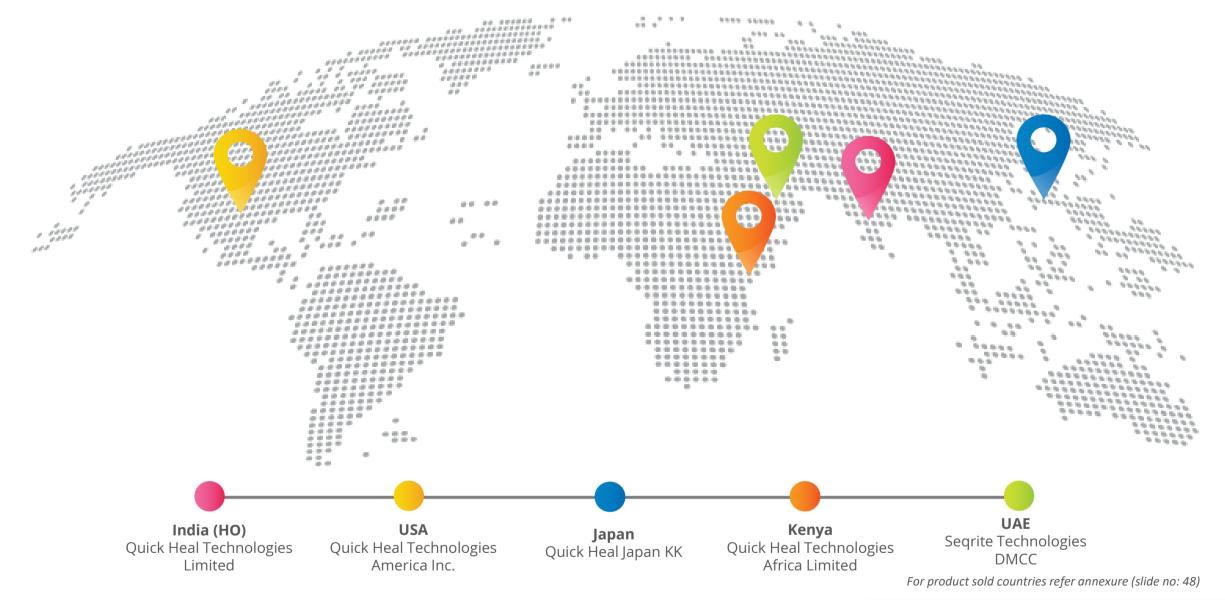
# Product Portfolio - Home, SOHO & Mobile



## Robust sales & distribution network in India

#### Sales Execution Robust pan India coverage **Complimentary support Metro Sales Coverage** from Quick Heal Strong presence across the Zonal and regional sales top metros in India. team to engage and support Coverage through T1 distributors and T2 resellers channel Landscape across Class B &C towns **Presence in Class A towns** Growing presence of T1 distributors Strong distribution across across B&C towns. Strong network of Class A towns backed by T2 T2 resellers - across Class B and Class resellers

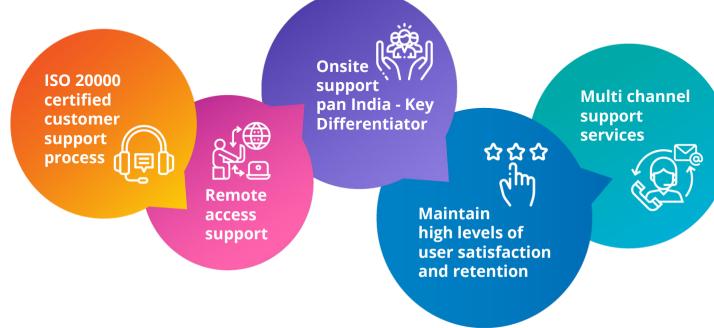
# **QUICK HEAL Global Presence**





# Committed to deliver exceptional customer experience

- Multi-lingual end user support in English, Hindi and several other major regional Indian languages
  - Availability of data sheets, product videos and manuals on website for providing information on technical specifications, installation guide, upgrade mechanisms
    - Release of various articles, technical papers, quarterly threat reports and conducting webinars in the area of security software



# **Experienced Board of Directors**



Dr. Kailash Katkar *MD & CEO* 

Drives the strategic direction for the company while nurturing a strong leadership team to drive its execution



Dr. Sanjay Katkar Joint MD & CTO

Spearheads the creation and subsequent development of the core product technology



Mr. Shailesh Lakhani Non-Executive Director

Serves as the MD at Sequoia Capital India. Previously, he worked at Redknee's India subsidiary as the Managing Director



Mr. Amitabha Mukhopadhyay Independent Director

Over three decades of experience in corporate finance, legal and litigation, strategy and M&A. Served as the Group CFO of Thermax



Air Marshal (Retd) Bhushan Nilkanth Gokhale Independent Director

Served on the board of defense PSUs and adviser to government institutions. Appointed as Independent Security Advisor in Ministry of Home Affairs.



Mr. Mehul Savla Independent Director

Serves as Director for RippleWave Equity Advisors LLP. Previously worked at JP Morgan, ICICI Securities and SEBI



Ms. Apurva Joshi Independent Director

Certified bank forensic accounting professional and anti – money laundering expert

# ...along with strong Management...



Dr. Kailash Katkar *MD & CEO* 

#### **Co-founder of the Company**

Has been the driving force in growing Quick Heal Technologies since it's inception.

A proven leader with a profound proficiency in developing strong client relationships, passion for building outstanding teams and a disciplined focus on operations & execution of strategy.



Dr. Sanjay Katkar Joint MD & CTO

#### **Co-founder of the Company**

Leads the global technology strategy & is responsible for the core research & development of the products.

Has served as the Director of Association of Anti-Virus Researchers, Asia and is a distinguished speaker at various industry forums.

Holds Master's degree in Computer Science from the University of Pune.

# ...and seasoned Leadership team



Mr. Nitin Kulkarni *CFO* 

25+ years of experience in managing different aspects of finance in IT and Manufacturing Industry.

Previously held leadership positions at Tech Mahindra, KPIT, Atlas Copco India and Persistent Systems.

A member of the Institute of Chartered Accountants of India.



Ms. Reetu Raina

Responsible for driving HR and steering the company's people operations, culture and recruitment initiatives.

Ms. Raina holds extensive industry experience and has worked across sectors such as Telecom, BFSI, and IT.

She has held leadership roles with domain-leading brands such as TATA, HDFC Bank, and Amdocs. She was the Head of HR at Sterlite Technologies.



Mr. Sanjay Agrawal

Responsible for driving the overall product vision and strategy in line with market expectations.

Sanjay is an entrepreneurial engineering and product leader with two decades of experience and proven success in building cybersecurity products for the global markets.

A computer engineering graduate from University of Illinois, Sanjay holds a Ph.D. and M.S. from Stanford University in Electrical Engineering and Computer Science (EECS).

# ...and seasoned Leadership team



Mr. Bibhuti Kar Head of Research and Development

Responsible for driving company's development efforts leading a team of talented engineering professionals and security researchers.

Bibhuti brings with him over two and a half decades of rich experience in the global high-tech industry.

An alumnus of IIT Kharagpur with a master's in ECE, he has worked on missile communication systems with DRDO.



Mr. Kuldeep Raina Head, Global Enterprise Sales

Responsible for leading the enterprise and government sales strategy and managing the vertical on a global level.

Passionate technocrat with a rich flare for sales and ability to drive targets in dynamic business environment.

Over two decades of diverse sales experience including leadership roles in cybersecurity companies.



Mr. Deepak Mishra Head, Retail Sales

Responsible for enhancing market share and driving channel strategy for the retail brand.

Has extensive exposure in sales and distribution, channel management, and building a robust distribution to drive productivity and profitability.

Over two decades of experience in FMCG, Beverages, Telecom and IT Industries.



Mr. Bijoe George Head, Global Marketing

Marketing strategist with over two decades of rich data-driven, integrated marketing experience.

Leading marketing transformation to deliver strategic value. Has extensive experience working on technology brands that include Cisco, HPE, Infosys, Citrix to name a few.

Bijoe loves the interplay between strategy, technology and creative while delivering results, big ideas and big wins.

# Strong brand recognition...



**Best Enterprise IT Security Brand** at the 11th NCN Innovative
Product Award 2018



**Best Protection rate** In AV-Comparatives Test 2018



Certified as
'Approved
Corporate Endpoint
Protection' for
Windows by
'AV-Test' 2018



Best cybersecurity brand award at National Summit on Digital Innovation & Cybersecurity Summit 2018



Quick Heal Technologies

Recognized by NASSCOM's DSCI as 'Cybersecurity Product Pioneer

**in India'** 2019



**Seqrite** 

'Best Performance 2018' award for its Endpoint Security Solution from AV-Test Institute in Germany 2019



Quick Heal Technologies

Granted Patent for Anti-Ransomware Technology 2019 U.S. Patent No. US20160378988A1



Quick Heal Technologies

Granted Patent for its **Signatureless Behavior-based Detection Technology** 2019 U.S Patent No. US20170124327A1



Seqrite Endpoint Security

Certified as 'Top Product' for business users by 'AV-Test' in 2020



**Quick Heal Total Security** 

Certified as **'Top Product'** for
consumers
by **'AV-Test'** in 2020

# ...backed by Certifications, Patents and...

#### International & ISO Certifications















#### **Patented Technologies**

#### USPTO 10,387,649

Signatureless Behaviour-based Detection Technology

#### USPTO 10,311,234

Anti-Ransomware technology

#### USPTO 8,973,136

System and method for protecting computer systems from malware attacks

#### USPTO 8,914,908

A completely automated computer implemented system and method for piracy control based on update requests



System for protecting devices against virus attacks

#### USPTO 7,945,955

Virus detection in mobile devices having insufficient resources to execute virus detection software

# Our marquee customers

























#### Trusted by over 9 million users across the world

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# Securing the future through our community initiatives

*22,87,000*+

Lives directly impacted since 2016



#### **Cybersecurity**

- Cybersecurity Awareness
- Securing Futures through secured programming







*20,000*+

Lives directly impacted since 2016



#### **Education**

- Life Skills Education
- Shaalangan Counselling Centre





*2,500*+

Lives impacted since 2016



# Eradicating Extreme Hunger & Poverty

Project Disha works with Paud's Katkari Tribe









# Quick Heal Academy to drive the next generation of cyber security experts



#### **Popular Courses**

- ✓ Cyber Security and Forensics
- ✓ Cyber Threat Intelligence
- ✓ Malware Analysis & Reverse Engineering
- ✓ Security Operations Centre (SOC)
- ✓ Electronic Crime Scene Investigation

#### Offerings



CORPORATE TRAINING



NEED-BASED TRAINING



WORKSHOPS & SEMINARS



**ECO-SYSTEM** 

#### **Academy Partners**

#### **Savitribai Phule Pune University**

Designed 'M-Tech in Information Security' Program for Savitribai Phule Pune University

#### **Quantum University**

W

Quantum

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**CHITKARA** 

MoU with Quantum University for a joint B.Tech (Hons.) with specialization in Cyber Security

#### **Gujarat Forensic Sciences University**

MoU with Gujarat Forensic Sciences University during Vibrant Gujarat 2017

#### **Maharashtra Cosmopolitan Education Society**

The society runs 30 institutes from its ultra modern campaigns located in Maharashtra

#### **Chitkara University**

MoU with Chitkara University Introduced an additional stream in Cyber Security for the four-year Undergraduate program

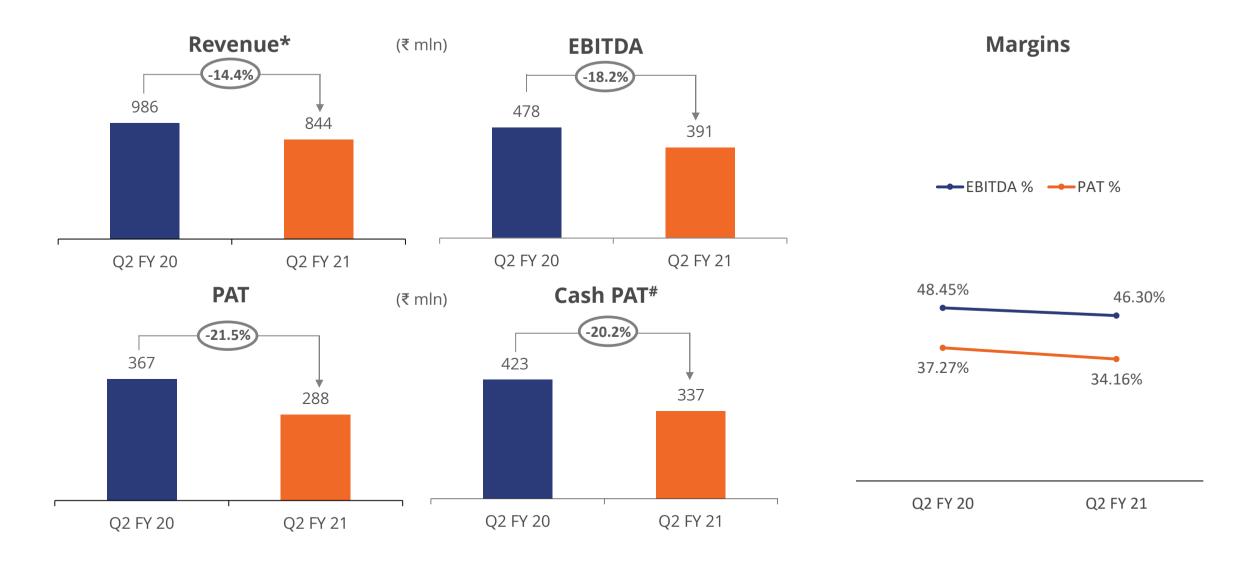
#### Deen Dayal Upadhyaya College

MoU with Deen Dayal Upadhyaya College, a constituent college of the University of Delhi

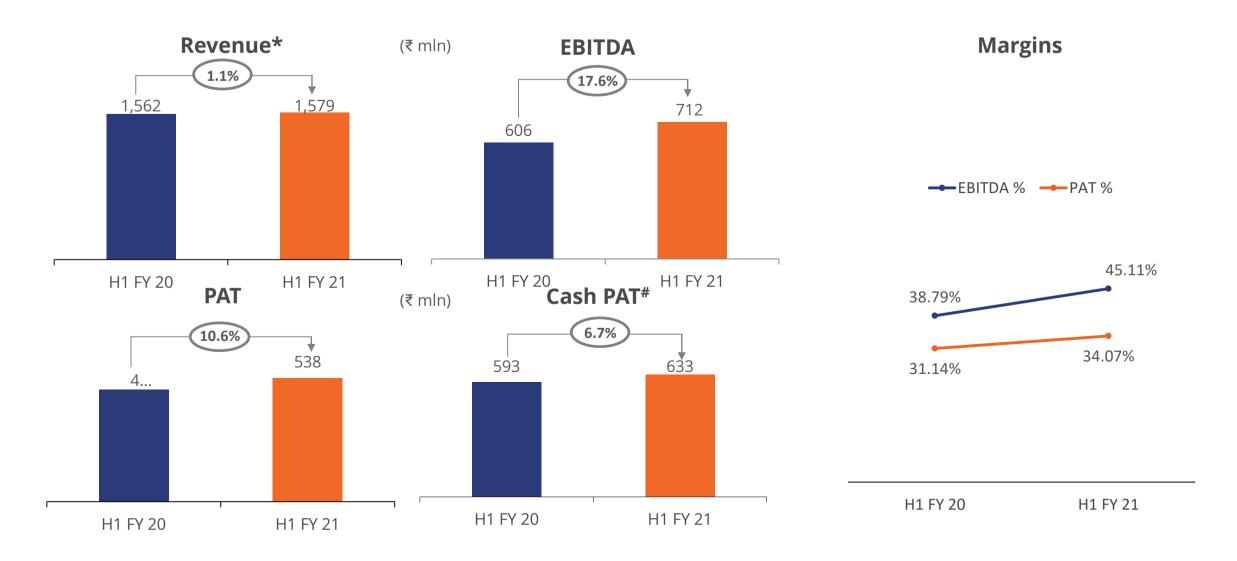




# Q2FY21 - Consolidated Performance Highlights

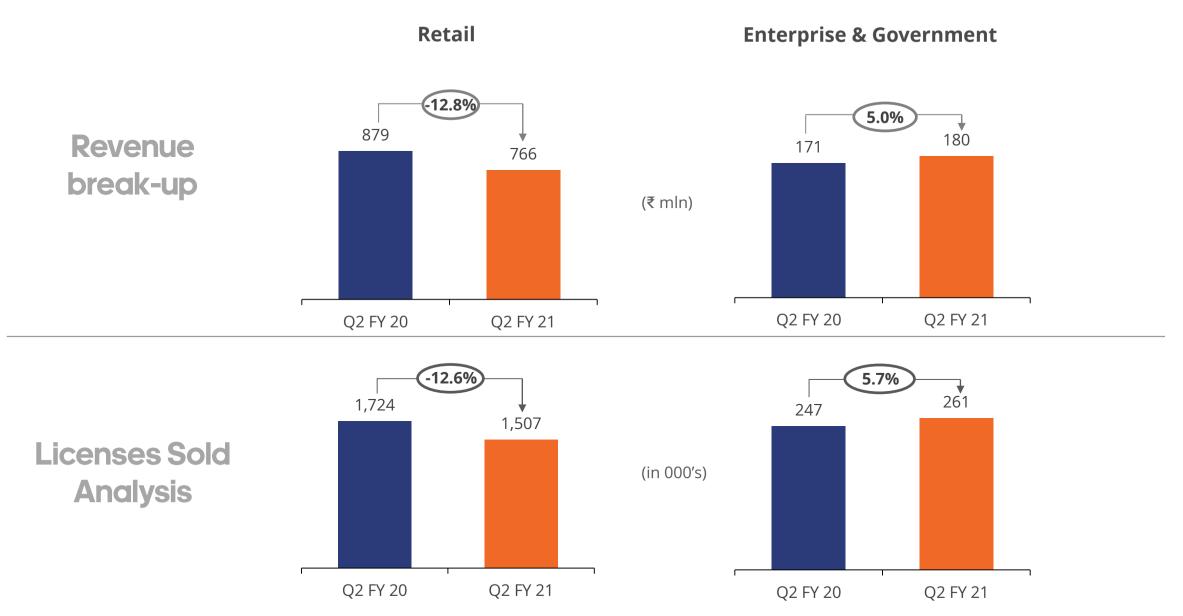


# H1FY21 - Consolidated Performance Highlights

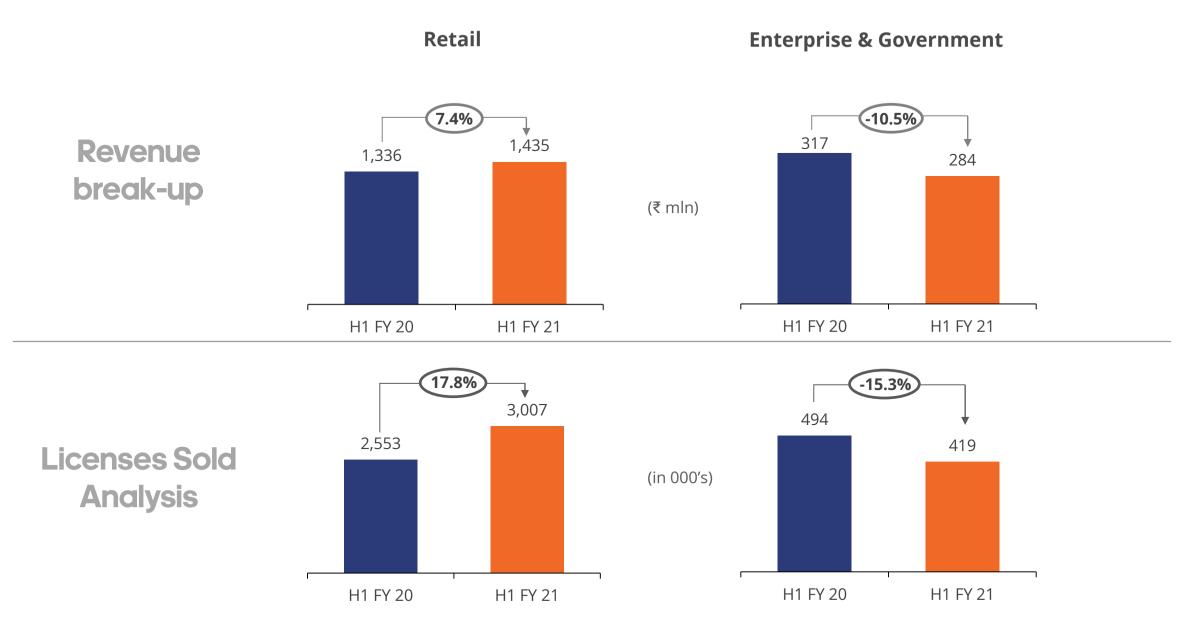


\*As per Ind AS # Cash PAT = PAT + Depreciation

# Q2FY21 Segment performance



# H1FY21 Segment performance



# Q2FY21 - Profitability statement

DADTICIII ABS (# mln)		Standalone		C	onsolidated	
PARTICULARS (₹ mln)	Q2FY20	Q2FY21	% change	Q2FY20	Q2FY21	% change
Total Revenue	976.89	828.60	-15.18%	985.77	844.13	-14.37%
Direct Cost	33.61	33.48		41.91	36.11	
Gross Profit	943.28	795.12	-15.71%	943.86	808.02	-14.39%
Gross Margin	96.56%	95.96%	-60bps	95.75%	95.72%	-3bps
Operating Cost						
Research and Development (R&D)	138.00	160.24		138.00	160.24	
Sales and Marketing (S&M)	201.48	138.28		206.57	142.24	
General Administration (G&A)	117.78	109.27		121.70	114.68	
Total Expenditure	457.26	407.79	10.82%	466.27	417.16	10.53%
EBITDA	486.02	387.33	-20.31%	477.59	390.86	-18.16%
EBITDA Margin	49.75%	46.75%	-301bps	48.45%	46.30%	-215bps
Depreciation	55.25	48.74		55.30	48.79	
EBIT	430.77	338.59	-21.40%	422.29	342.07	-19.00%
EBIT Margin	44.10%	40.86%	-323bps	42.84%	40.52%	-232bps
Other Income	72.95	57.19		73.38	58.25	
Profit Before Tax (PBT before exceptional items)	503.72	395.78	-21.43%	495.67	400.32	-19.24%
Exceptional Item	-	-		-	-	
Profit Before Tax (PBT after exceptional items)	503.72	395.78	-21.43%	495.67	400.32	-19.24%
Tax	128.05	111.77		128.31	111.97	
Profit After Tax (PAT)	375.67	284.01	-24.40%	367.36	288.35	-21.51%
PAT Margin	38.46%	34.28%	-418bps	37.27%	34.16%	-311bps

# Q2FY21 - Ratio analysis

I 07	Standalone		Consolidated	
In %	Q2FY20	Q2FY21	Q2FY20	Q2FY21
Expenses				
Direct Cost / Revenue	3.44%	4.04%	4.25%	4.28%
R&D / Revenue	14.13%	19.34%	14.00%	18.98%
S&M / Revenue	20.62%	16.69%	20.96%	16.85%
G&A / Revenue	12.06%	13.19%	12.35%	13.59%
Total Cost / Revenue	46.81%	49.21%	47.30%	49.42%
Margin				
Gross Margin	96.56%	95.96%	95.75%	95.72%
EBITDA	49.75%	46.75%	48.45%	46.30%
EBIT	44.10%	40.86%	42.84%	40.52%
PBT (Before Exceptional Item)	51.56%	47.76%	50.28%	47.42%
PBT (After Exceptional Item)	51.56%	47.76%	50.28%	47.42%
PAT	38.46%	34.28%	37.27%	34.16%

## Consolidated Balance Sheet

<b>EQUITY AND LIABILITIES</b> (₹ mln)	Sep 30, 2019	Sep 30, 2020
Share Holder's Funds:		
Equity Share Capital	642.03	642.03
Share application money pending allotment	-	-
Reserves and Surplus	5,849.78	6,341.20
Total Shareholder Funds	6,491.81	6,983.23
Non-Current Liabilities		
Net employee defined benefit liabilities	4.64	6.86
Other Non Current Liabilities	19.63	0.30
Total Non-Current Liabilities	24.27	7.16
Current Liabilities:		
Trade and Other Payables	352.53	501.73
Other Financial Liabilities	17.53	18.15
Other Current Liabilities	153.88	142.54
Net employee defined benefit liabilities	18.67	11.42
Current tax liabilities (Net)	38.32	136.97
Total Current Liabilities	580.93	810.81
Total Equity & Liabilities	7,097.01	7,801.20

ASSETS (₹ mln)	Sep 30, 2019	Sep 30, 2020
Non-Current Assets:		
Property, plant and equipment	1,565.26	1,427.40
Capital work-in-progress	36.63	34.00
Intangible assets	51.09	70.86
Non-current financial assets		
Investments in MF ,Tax-Free Bonds	320.86	172.78
Loan and Security Deposits	3.81	3.82
Bank Balances	3.89	4.03
Deferred tax assets (net)	66.65	31.16
Other non current assets	85.24	211.23
Total Non-Current Assets	2,133.43	1,955.28
Current assets:		
Inventories	44.57	46.69
Investment in Mutual Fund	2,439.87	3,658.79
Trade and other receivables	1,249.94	1,327.97
Bank Balances & Cash and Cash Equivalents	131.91	128.09
Investment in Fixed Deposit	1,012.57	561.50
Loan and security deposits	7.52	8.03
Interest accrued on FDR and Tax-Free Bonds	31.98	12.77
Other Current assets	45.22	102.08
Total Current Assets	4,963.58	5,845.92
Total Assets	7,097.01	7,801.20

NOTE: Certain figures have been re-grouped wherever necessary

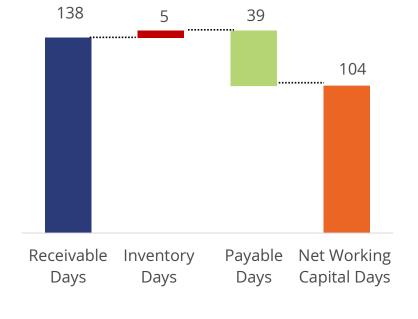
## Standalone Balance Sheet

<b>EQUITY AND LIABILITIES</b> (₹ mln)	Sep 30, 2019	Sep 30, 2020
Share Holder's Funds:	•	•
Equity Share Capital	642.03	642.03
Share application money pending allotment	-	-
Reserves and Surplus	5,912.19	6,387.57
Total Shareholder Funds	6,554.22	7,029.60
Non-Current Liabilities		
Net employee defined benefit liabilities	4.64	6.86
Other Non Current Liabilities	19.63	0.30
Total Non-Current Liabilities	24.27	7.16
Current Liabilities:		
Trade and Other Payables	348.17	500.29
Other Financial Liabilities	17.53	18.15
Other Current Liabilities	150.77	140.07
Net employee defined benefit liabilities	18.43	11.42
Current tax liabilities (Net)	37.82	136.37
Total Current Liabilities	572.72	806.30
Total Equity & Liabilities	7,151.21	7,843.06

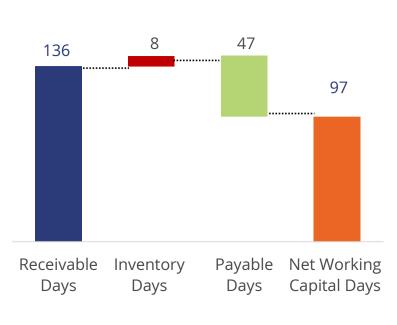
ASSETS (₹ mln)	Sep 30, 2019	Sep 30, 2020
Non-Current Assets:		·
Property, plant and equipment	1,564.99	1,427.18
Capital work-in-progress	36.63	34.00
Intangible assets	50.89	70.68
Non-current financial assets		
Investments in MF & Tax-Free Bonds & Subsidiaries	438.05	287.79
Loan and Security Deposits	3.81	3.82
Bank Balances	3.89	4.03
Deferred tax assets (net)	66.65	31.16
Other non current assets	85.24	211.23
Total Non-Current Assets	2,250.15	2,069.89
Current assets:		
Inventories	40.03	46.47
Investment in Mutual Fund	2,439.87	3,658.79
Trade and other receivables	1,248.17	1,315.42
Bank Balances & Cash and Cash Equivalents	76.89	68.73
Investment in Fixed Deposit	1,012.57	561.50
Loan and security deposits	6.84	7.96
Interest accrued on FDR and Tax-Free Bonds	31.98	12.77
Other Current assets	44.71	101.53
Total Current Assets	4,901.06	5,773.17
Total Assets	7,151.21	7,843.06

# Working capital analysis

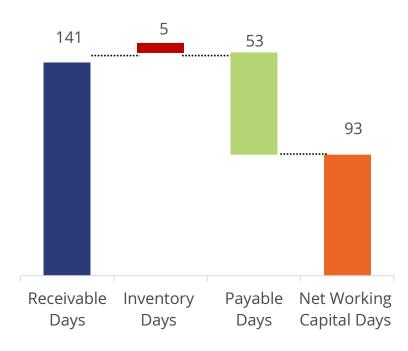
#### At the end of September, 2019\*



#### At the end of March, 2020\*\*



#### At the end of September, 2020\*



#### Note\*\*

Receivable Days = [(Debtors/ Sales) X (365 days)] Inventory Days = [(Inventory/Sales) X (365 days)] Payable Days = [(Creditor/Sales) X (365 days)]

#### Note\*

Receivable Days = [(Debtors/ Sales) X (183 days)] Inventory Days = [(Inventory/Sales) X (183 days)] Payable Days = [(Creditor/Sales) X (183 days)]

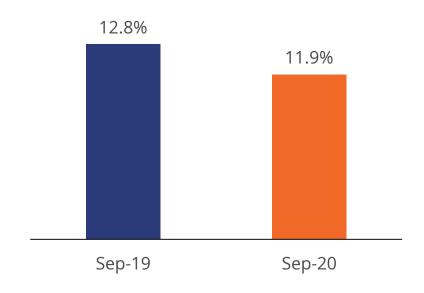
Calculation is based on net revenues before adjusting for sales incentives

# Return ratio analysis



# 37.3% 13.6% 12.1% Sep-19 Sep-20 RoCE Cash Adj RoCE

#### **Return on Equity\***



- > Company is continuously evaluating strategic inorganic opportunities to invest across the cybersecurity ecosystem
- > Till such time the company invests its surplus cash in mutual funds, tax free-bonds and fixed deposits

**RoCE** = EBIT / Avg. Capital Employed (Equity + Debt) **Cash Adj. RoCE** = EBIT / Avg. Cash Adj. Capital Employed (Equity + Debt – Cash & Cash Equivalents)

**ROE** = PAT / Avg. Equity

<sup>\*</sup> Calculated on trailing 12 months basis





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# Annexure

#### Products Sold in following countries

- Italy
- Nigeria
- UAE
- Kenya
- Philippines
- Colombia
- Sri Lanka
- Singapore
- Congo
- Bangladesh
- Thailand
- Peru
- Australia

- Mexico
- Hong Kong
- Mauritius
- South Africa
- Iordan
- Malaysia
- Gambia
- Venezuela
- USA
- Guinea
- New Zealand
- Cambodia
- Ecuador

- Chile
- South Korea
- Paraguay
- Saudi Arabia
- Turkey
- Aruba
- Ghana
- Tanzania
- Canada
- Panama
- Myanmar
- Honduras
- Rwanda

- Germany
- Malta
- Uganda
- Fl Salvador
- Croatia
- Nicaragua
- Zambia
- Poland
- Netherlands

#### Sales & Support offices across India

- Chandigarh
- New Delhi
- laipur
- Lucknow
- Patna
- Guwahati
- Ahmedabad
- Indore
- Surat
- Nashik
- Nagpur
- Mumbai
- Pune

- Aurangabad
- Kolhapur
- Raipur
- Kolkata
- Bhubaneshwar
- Hyderabad
- Bangalore
- Chennai
- Kochi

