

# Info Edge (India) Limited

India's internet classifieds company

Sep, 2020

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This presentation contains the Company’s audited financial information as at and for the financial year ending March 31, 2020 and as at and for the month ended Jun 30, 2020. Investors should be aware that such financial information may be subject to certain adjustments during the course of audit/review and the audited/reviewed financial statements of the Company, when announced, may differ from those contained in this presentation.

In this presentation:

- All figures mentioned are for the Company as a standalone entity and are as of June 30, 2020 or for the quarter ended June 30, 2020, unless indicated otherwise.
- Q1 FY21 or Q1 FY 20-21 means the period commencing on April 01, 2020 and ending on June 30, 2020.
- FY21 or FY 20-21 or FY 2021 means the Financial Year starting April 1, 2020 and ending March 31, 2021.
- 1 Crore = 10 Million = 100 Lakh.

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## Info Edge – Leading Online Classified Businesses in India



Online Recruitment Search engine



Online Real Estate Search Portal



Online Match making ( Matrimony) Portal



Online Education Classified Portal

## Investments in Technology-based Startups



Online restaurant search engine and food delivery site.

Shareholding ~22.20%\*<sup>@</sup>



Online insurance policies marketplace.

Shareholding ~15.1%\*<sup>^</sup>



Men's grooming range (Ustraa)

Shareholding ~30%\*

# Other investments include NoPaperForms (Advanced enrolments management platform, 48.10%), Univariety (Guidance on careers, admissions and tests ,37.9%), Gramophone (Agri-Inputs e-commerce, 33.2%), Shoekconnect (B2B footwear marketplace, 28.22%), Printo (Retail chain providing print and document services, 25.1%), Medcords ( Health care Tech Platform, 15.7%), Shopkirana (B2B grocery delivery platform, 25.3%), Adda (Govt Job Preparation Platform, 16.97%), Shipy (Digital Logistics ecosystem, 10.00%), Legitquest (SaaS Product for intersection of Tech and Legal utilizing Machine Learning, 16.67%), GreytHR (HR & Payroll SaaS Company 20.25%), Teal (Platform for real Estate intelligence and analytics, 20.00%), Coding Ninjas (25%), Qyuki (New Media Company, 5.36), Dotpe (7.48%), Truemed (17.80%), Fanbuff Esports India Limited ( 20%), Rusk Media Pvt Ltd ( 10%) and Bulbulive Shopping network Pvt Ltd (17.82%).

We may from time to time consider various investment / asset monetization opportunities, as we had done in past, However there can be no assurance regarding whether we will be able to complete such investments / asset monetization opportunities on commercial terms acceptable to us , or at all.

No definitive documentation in connection with such investment/ monetization has been executed as of date.

\* Approximate shareholding on fully disbursed and converted basis as on 10<sup>th</sup> Sept, held directly or indirectly (through subsidiaries, associates or affiliates). The % shareholding may or may not translate into an equivalent economic interest on account of conditions in the investment/ shareholders agreements.

<sup>@</sup> Net of disposal of secondary sale with proceeds of USD 50 mn; Shareholding post the latest round of investment and dilution

<sup>^</sup> Represents effective economic interest held by Info Edge directly (7.59%) and indirectly through subsidiary companies – in partnership with Temasek (8.26%)

## Key Financials- Past 3 years performance

*All numbers in Rs MN except %*

Description	FY 18	FY19	FY 20	CAGR
Revenues	9,155	10,983	12,727	18%
Billing	9,767	11,770	12,687	14%
Operating EBITDA*^	2,973	3,413	4,027	13.1%
Operating Margin (%)^	32%	31%	32%	
Operating PBT ^	2,814	3,986	3,190	
Cash and Bank Bal #	15,003	15,499	12,613	
Net Investments in Investee Companies**	7,687	5,911	10,810	
Head Count ( Nos)	4,036	4,330	4697	
Dividend Payout ( % of paid up capital)	55%	60%	60%	

\*IND-AS numbers for FY18-FY20; EBITDA for FY18-FY20 adjusted for non-cash charges.

\*\* This amount represents net investment in investee companies.

^ Operating EBITDA/ Margin / PBT excludes the impact of other income , non operating and exceptional items.

# Balance at standalone level and the same includes balances irrespective of duration of FD, including >1 Yr and doesn't include "Accrued Interest"

Info Edge standalone financials .

## Key Financials- Annual

*All numbers in Rs MN except %*

Description	FY 20	FY19	FY 18	Growth FY20 Vs 19	Growth FY19 Vs 18
<b>Billing</b>					
Info Edge *	12,687	11,770	9,767	7.8%	20.6%
- Recruitment	9,156	8,475	7,079	8.0%	19.6%
- 99Acres	2,139	2,067	1,571	3.5%	31.8%
<b>Revenue</b>					
Info Edge *	12,727	10,983	9,155	15.9%	20.0%
- Recruitment	9,068	7,858	6,688	15.4%	17.5%
- 99Acres	2,280	1,920	1,354	18.8%	42.2%
<b>Operating EBITDA</b>					
Info Edge *	3,774	3,413	2,973	10.6%	14.8%
- Recruitment	4,914	4,295	3,759	14.4%	14.1%
- 99Acres	9	(222)	(303)		
<b>Operating EBITDA %</b>					
Info Edge *	29.7%	31%	33%		
- Recruitment	54%	55%	56%		

\* Info Edge standalone financials . Segmental data for Naukri and 99acres

Above EBITDA numbers for FY 19-20 have been readjusted for IND AS 116 to ensure comparison with FY 2018-19 numbers. Accordingly it may differ from reported numbers to that extent.

## Key Financials- Qtrly Update

All numbers in Rs MN except %

Description	Q1'21	Q1'20	YOY	Q4'20	QoQ
<b>Billing</b>					
Info Edge *	1,886.0	3,363.3	-43.9%	3,319.1	-43.1%
- Recruitment	1402.8	2,195.0	-44.3%	2,440.4	-17.9%
- 99Acres	140.2	484.0	-71.0%	506.8	-72.3%
- JS	227.9	201.1	13.3%	238.1	-16.7%
- Shiksha	115.0	160.7	-28.4%	133.6	-13.9%
<b>Revenues</b>					
Info Edge *	2,801.4	3,127.7	-10.4%	3,228.1	-13.2%
- Recruitment	2,001.8	2,195.0	-8.8%	2,306.3	-13.2%
- 99Acres	424.8	564.2	-24.7%	563.5	-24.6%
- JS	225.4	199.2	13.2%	226.5	-0.4%
- Shiksha	149.3	169.3	-11.8%	131.8	13.2%
<b>Operating EBITDA %</b>					
Info Edge *	37%	32.3%		29.9%	
- Recruitment	60%	52%		5%	

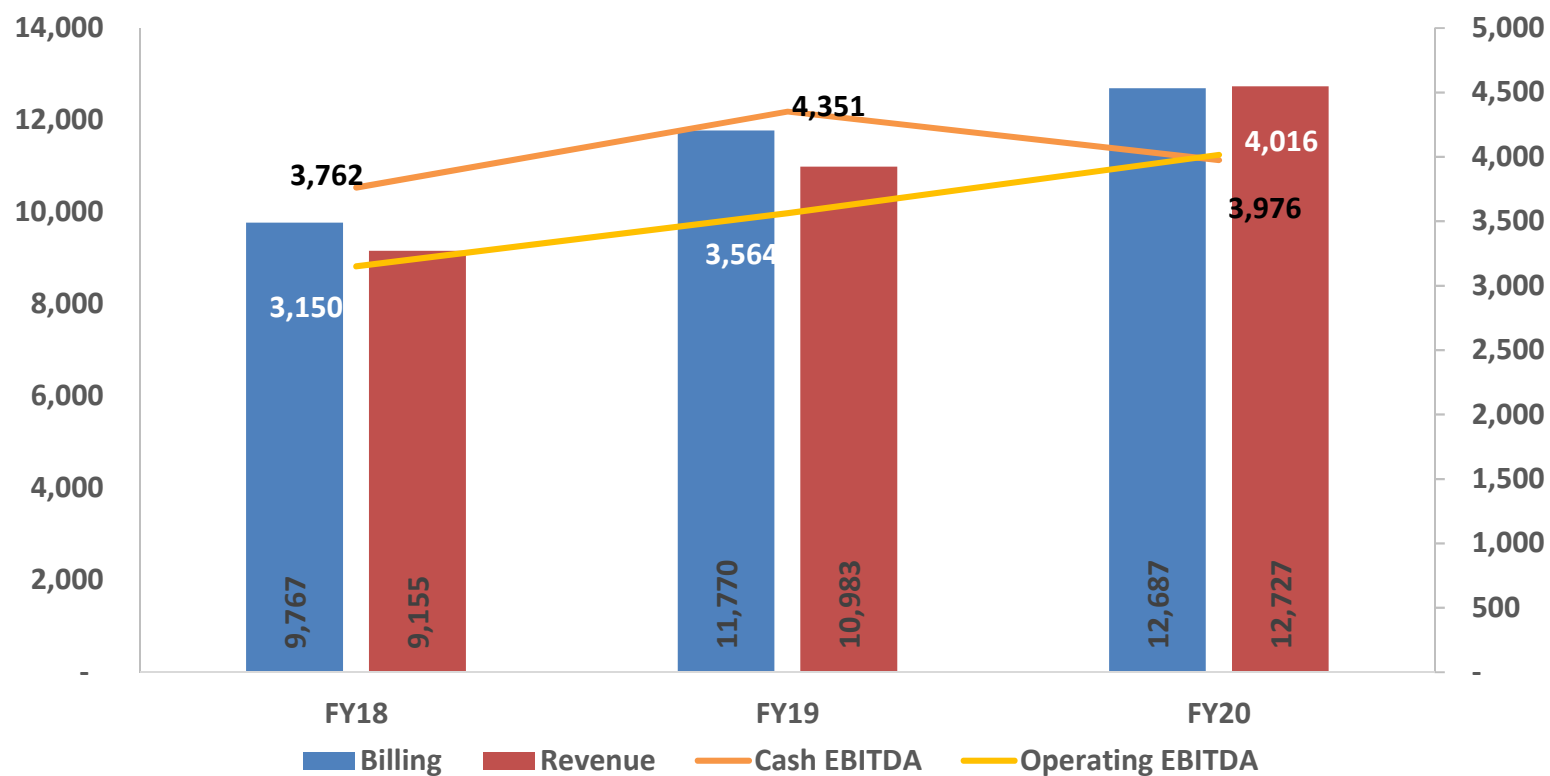
\* Info Edge standalone financials . Segmental data for Naukri and 99acres

- FY20 onwards EBITDA numbers includes the impact of IND AS 116.



# Financial performance

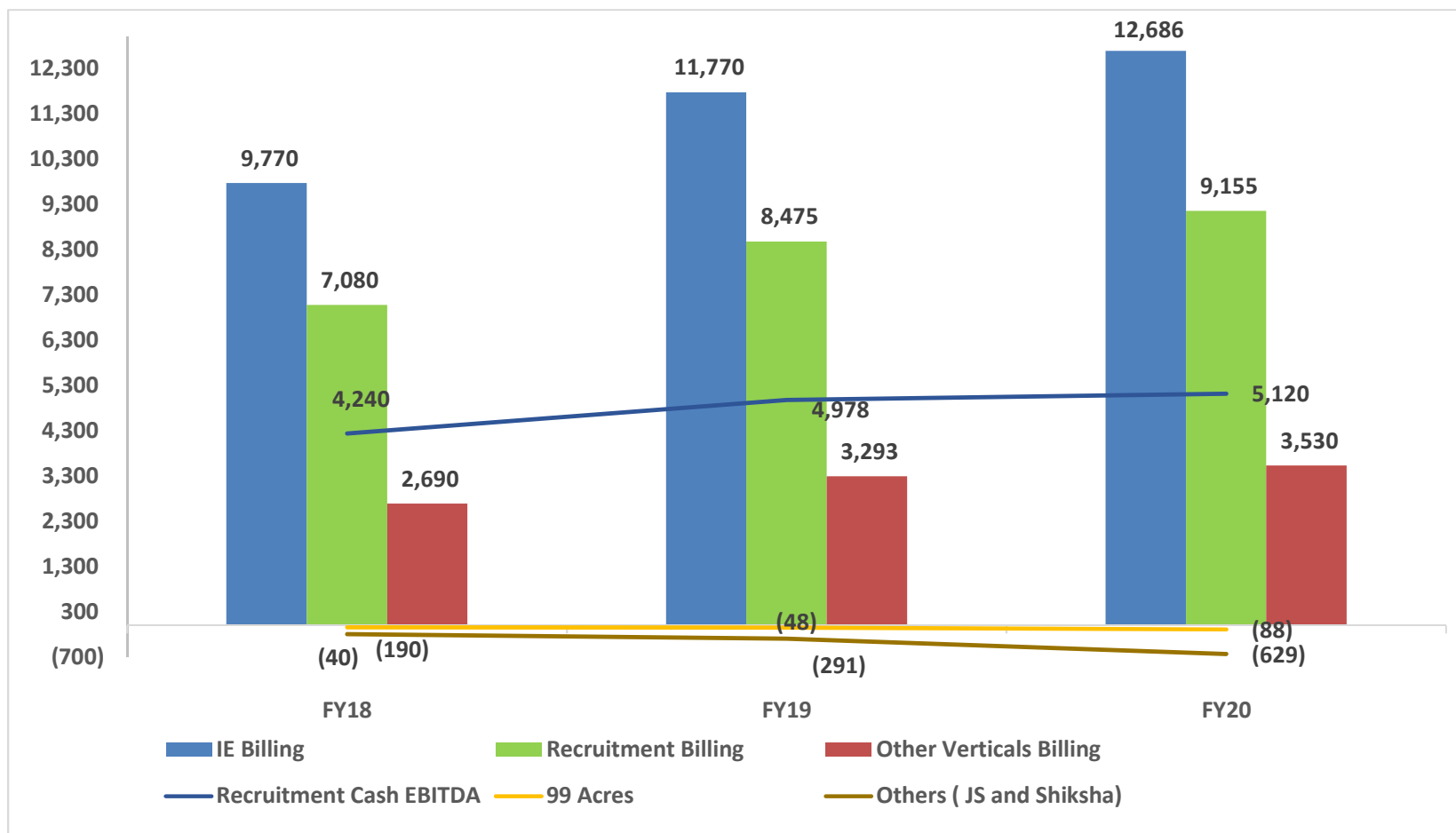
Info Edge Billing and Cash EBITDA\*\* (Rs Mn) trend



- IND-AS numbers for FY18-FY20;
- \*\* Cash EBITDA: Billing – Operating expenses adjusted for non-cash ESOP charges  
*Info Edge standalone financials* .

# Billing and Cash EBITDA

Segmental Billing and Cash EBITDA\*\* (Rs Mn) trend

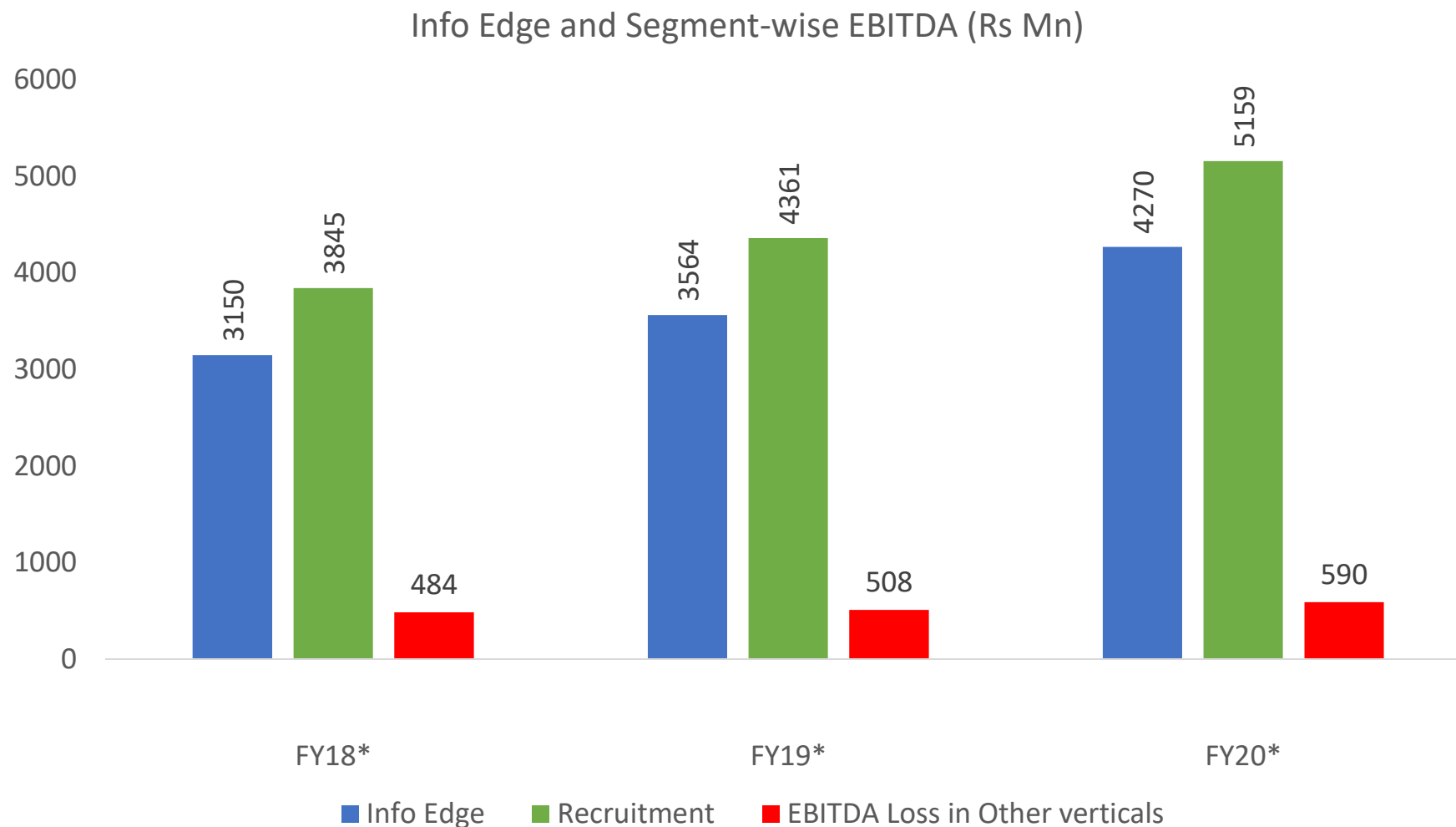


\* IND-AS numbers for FY18-FY20; Segmental data for Naukri and other verticals

\*\* Cash EBITDA: Billing – Operating expenses adjusted for non-cash ESOP charges

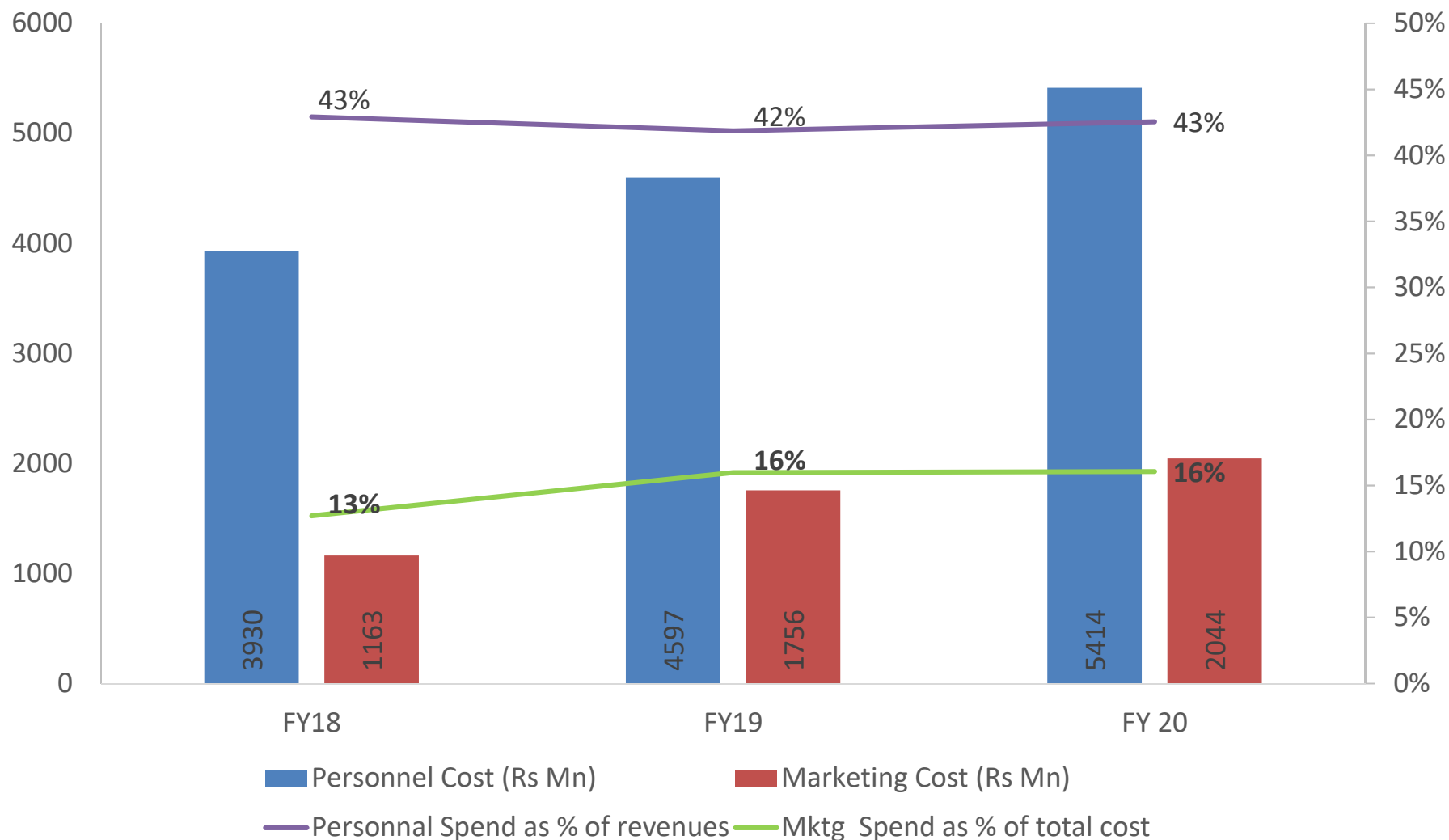
Info Edge standalone financials

# Operating EBITDA



- \* FY18– FY20 in the charts above are based on IND-AS numbers; rest all years which are as per I GAAP
- *Above EBITDA numbers for FY 19-20 have been readjusted for IND AS 116 to ensure comparison with FY 2018-19 numbers. Accordingly it may differ from reported numbers to that extent.*
- EBITDA for FY18-FY20 adjusted for non-cash charges
- *Info Edge standalone financials.*

## People, Brand and IP - Key Value Drivers for Info Edge

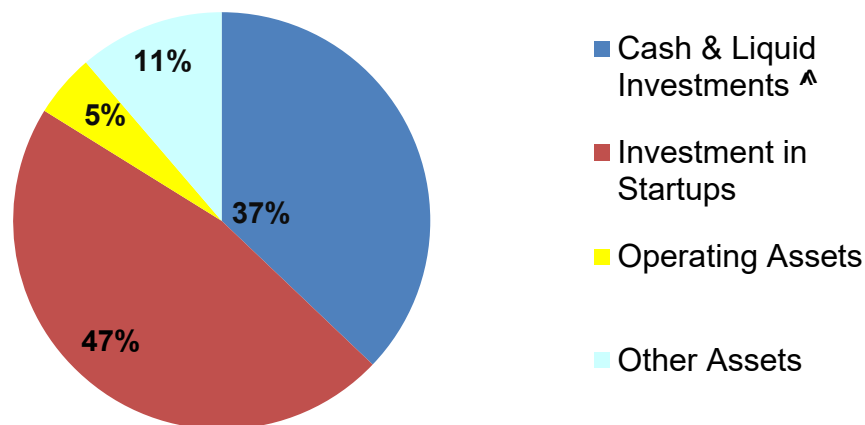


- Manpower and marketing constitute ~84% of our total standalone expenses
- Consistent investment in marketing efforts and IP creation leading to a strong network effect , platform and brand presence for Info Edge across verticals.
- *Info Edge standalone financials*

# Assets and funds Allocation

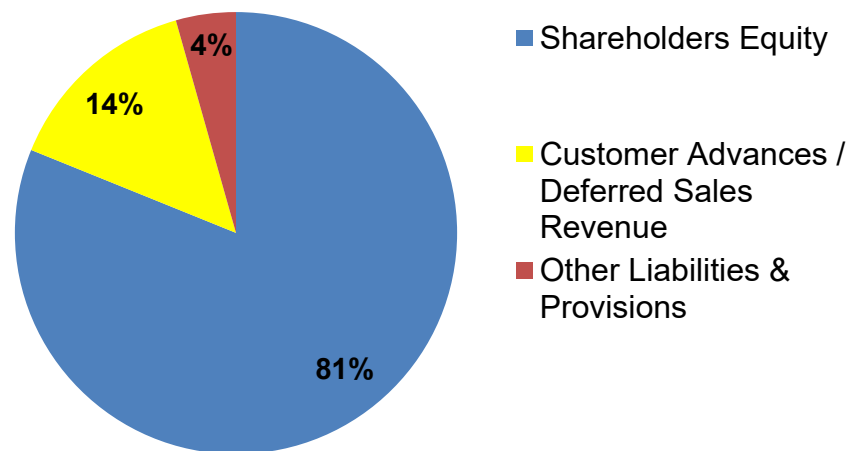
As of June 30, 2020 #

**Assets**



Total: 30,851 Mn

**Liabilities**



Total: 30,851 Mn #

- High margins due to operational leverage
- Strong cash generation due to high margins.

- Upfront payments in subscription model results in negative working capital
- Negative working capital many times more than operating fixed assets

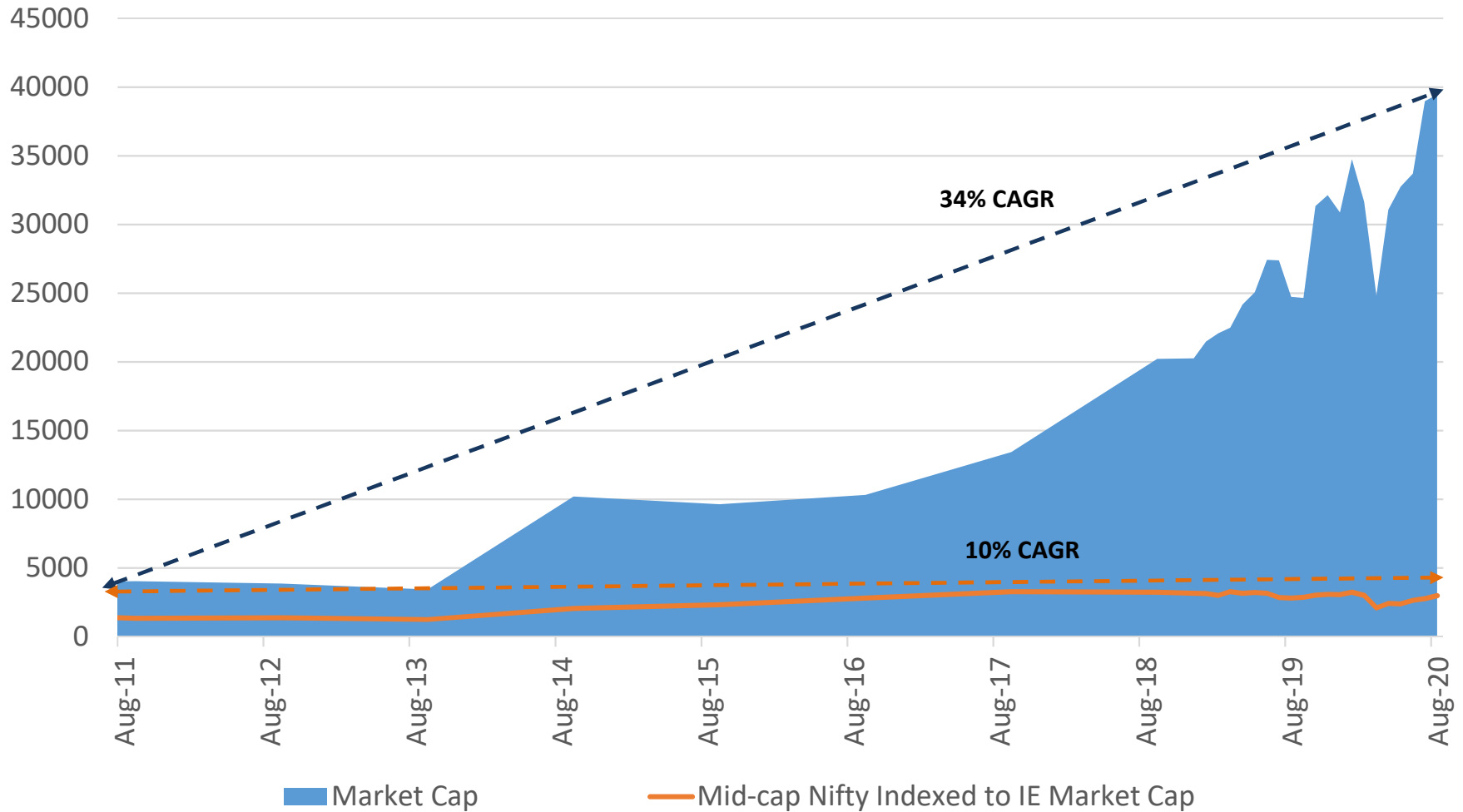
<sup>^</sup>Cash and Liquid Investments include Cash / bank balance with WOS & AIF. Investments in startup include IIM Jobs

## IE Venture Fund - AIF

- Floated an AIF Class II Fund, in Jan'20 duly registered by SEBI, to fund investments unrelated to the core operating entity.
- An efficient setup for future fund raising and regulatory standpoint.
- Proposed corpus of the fund is Rs 7500 MN ( around USD 100Mn). IEIL and its WOS in their capacity as LP, committed 3500 MN and out of this has already disbursed Rs 1500 MN till date.
- Investments through the fund ( till 31<sup>st</sup> July'20) , 995MN- Dotpe Pvt Ltd ,Qyuki Digital Media Pvt Ltd, Intellihealth Solutions Pvt Ltd ,Fanbuff Esports India Pvt Ltd , Ruskmedia, First Hive, Bulbullive shopping network pte ltd.
- WOS of IEIL are the GP to this fund.

# Market cap performance

Info Edge historical market cap trend (Rs Mn) and Nifty Mid-cap relative trend



## Corporate Governance- Cornerstone to our value system

- Independent Directors forms majority of the Board
- Non- Executive Chairman
- Statutory Audit performed by EY
- Internal Audit performed by an external firm
- Audit committee comprises only of Independent Directors
- Formal dividend policy (15% to 40% of standalone PAT)
- Whistle blower mechanism through an Independent External Ombudsman
- Proactive on all disclosures to Stock Exchanges



# Board of Directors

## Whole time

### Sanjeev Bikhchandani (56)

Founder and Executive Vice  
Chairman

BA Econ. St. Stephen's.

PGDM IIM-A

Previously with GlaxoSmithKline

### Hitesh Oberoi (48)

Managing Director and CEO

B.Tech IIT Delhi,

PGDM IIM-B

Previously with HLL (Unilever)

### Chintan Thakkar (53)

Whole-time Director and CFO

Chartered Accountant

Previously with Computer  
Associates, India

## Non Executive

### Kapil Kapoor (55)

Chairman & Non Executive  
Director

B.A.Econ, PGDM IIM-A

Previously COO (Global Business  
Development), Timex Group

## Independent

### Saurabh Srivastava (74)

Non Executive Director

B.Tech IIT Kanpur,

M.Sc Harvard

Founder IIS Infotech

(Now Xansa)

NASSCOM, TIE, IAN, IVCA

### Naresh Gupta (53)

Independent Director

B Tech IIT Kanpur, Ph.D,  
University of Maryland

Previously MD, Adobe India

### Bala Deshpande (54)

Independent Director

MA Econ., MMS JBIMS

Sr. MD, New Enterprise  
Associates (NEA)

### Ashish Gupta (53)

Independent Director

B Tech IIT-K, Doctorate from  
Stanford University

Founder Tavant Technologies,  
Junglee; Amazon

### Sharad Malik (56)

Independent Director

B Tech IIT-D, MS, PhD, University  
of California

Chair-(Deptt. of Electrical  
Engineering), Princeton University

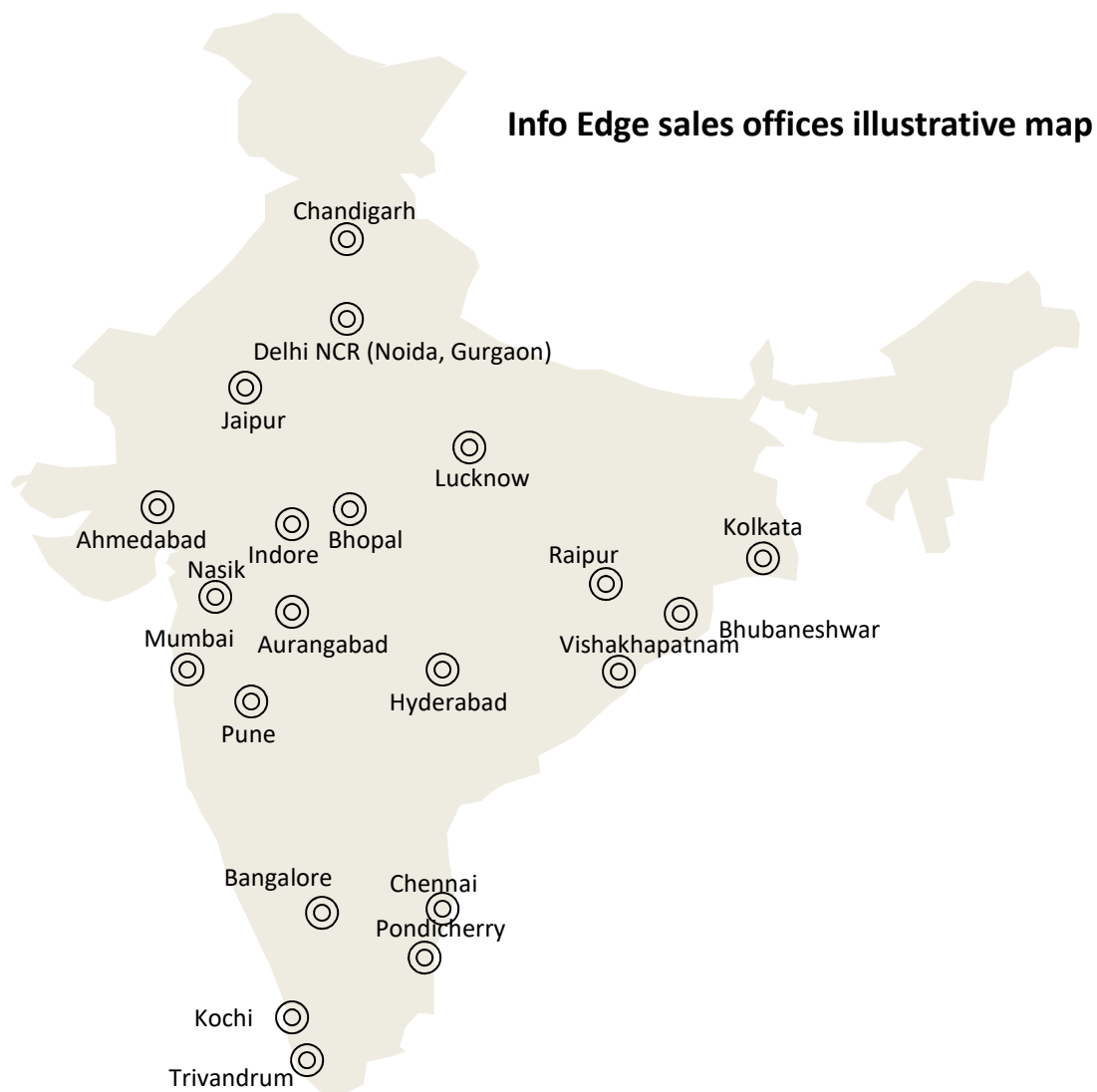
### Geeta Mathur ( 53)

Independent Director

Chartered Accountant

Associated with ICICI Bank,  
Helpage India, IPE Global.

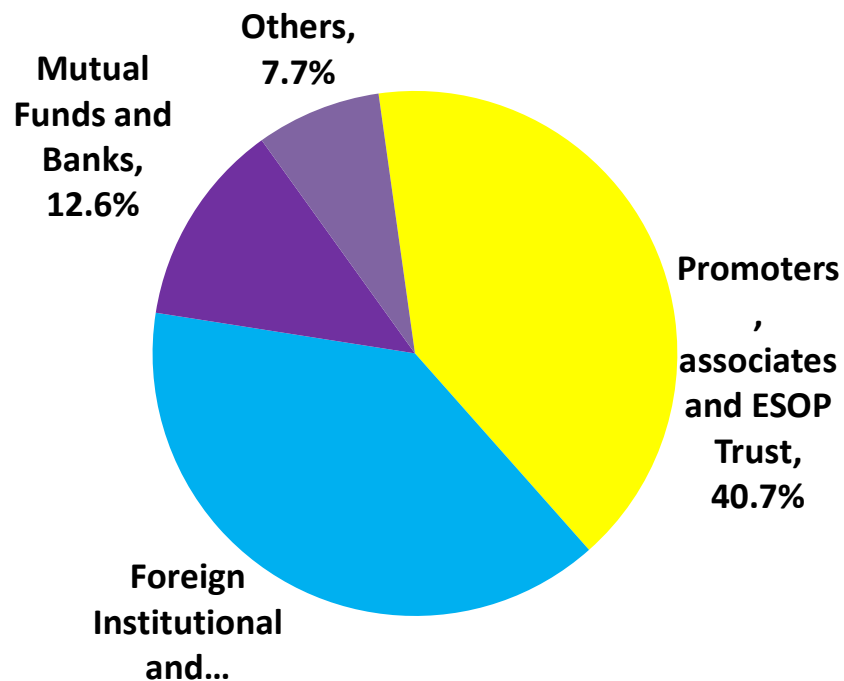
# Nationwide sales/customer interface infrastructure



## Geographical Spread as on date

- Nation wide coverage through 77 company branch offices in 47 cities in India
- 2959 sales/ servicing/ client facing staff or 65% of the company's workforce of 4562

# Shareholding



As of 20<sup>th</sup> Aug, 2020

Mutual Funds/ FIIs/ FPIs / Banks	% Holding
Axis Mutual Fund + Schroders	6.4%
Ward Ferry	3.5%
Nalanda	3.0%
Vanguard	1.6%
SBI	1.5%
Goldman Sachs EM Fund	1.5%
Amansa	1.5%
UTI -various	1.4%
Matthews	1.3%
Ishares	1.2%
ICICI Prudential	1.1%
Arisaig	1.0%
Stewart	0.9%
Wasatch - various	0.9%
Franklin Templeton MF	0.7%
HDFC Life	0.6%

Total number of issued and paid up shares of Rs 10 each are 121.5 million (post 1:1 bonus in Sept, 2010, 1:1 bonus in Jun, 2012 and dilution (QIP) in Sept, 2014)

# Naukri

The screenshot displays the Naukri.com website interface. At the top left is the Naukri.com logo with the tagline "India's No.1 Job Site". The main navigation bar includes "JOBS" (highlighted), "RECRUITERS", "COMPANIES", "SERVICES", "MORE", "LOGIN", and "NOTIFICATIONS". On the right side, there are links for "Employer Zone" and "Buy Online".

Below the navigation bar, there are five category tabs: "All Jobs", "IIT/IIM Jobs", "Govt. Jobs", "International Jobs", and "Walk-in Jobs".

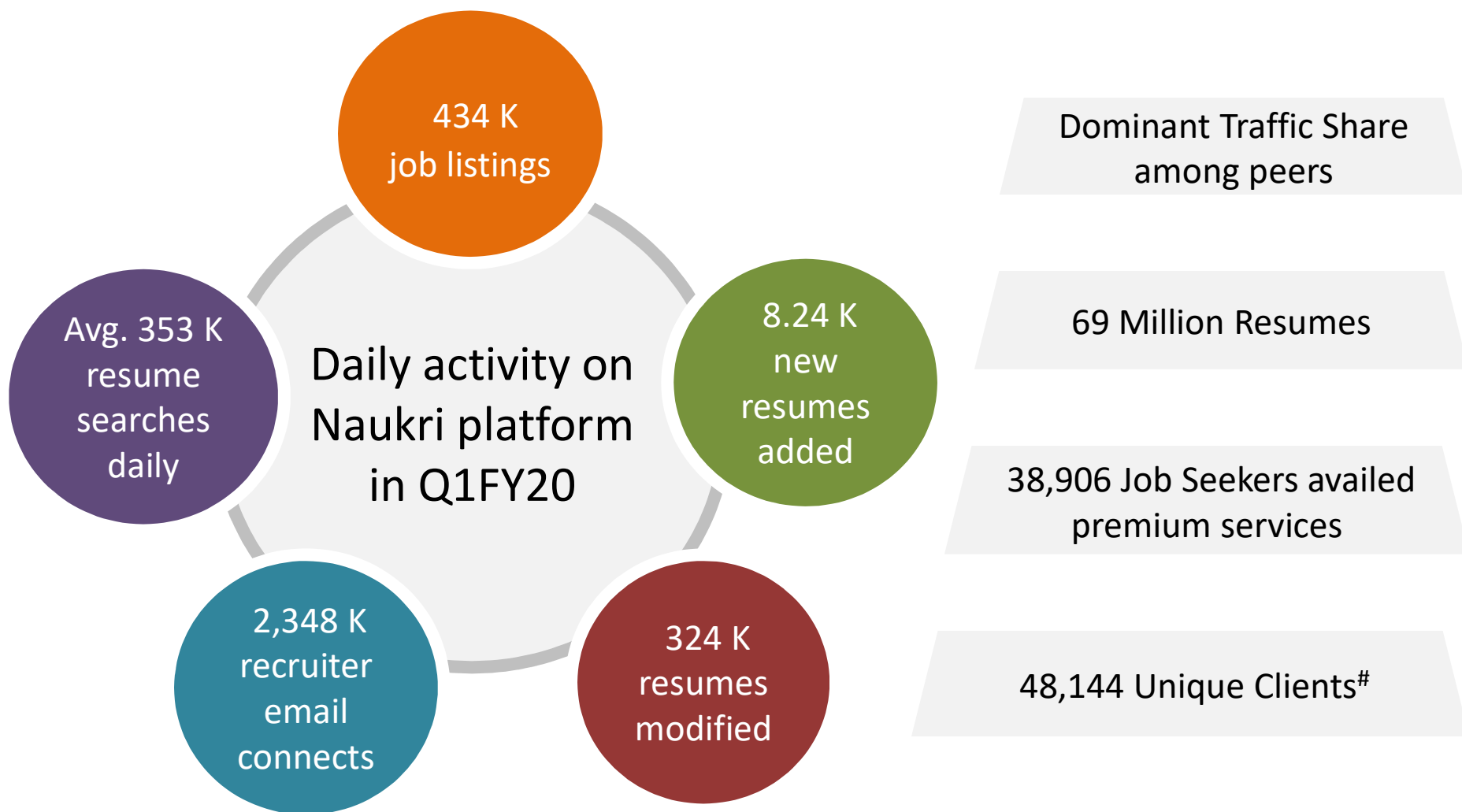
The main content area is divided into several sections:

- Search Jobs:** A search bar with the text "Search Jobs" and a blue "Search" button.
- Recent Searches:** A list of recent searches including "java programmer- 186 new jobs" and "investor relation- 135 new jobs".
- Recommended Jobs:** A section showing 27 recommended jobs. One job is highlighted: "Head Public Relations - Technology - MNC PR Firm, Bangalore" with 12-18 years of experience in Bengaluru/Bangalore. A "View All Jobs" link is provided.
- New to Naukri?:** A section with an orange "Register with us" button, an "or" separator, and a blue "Upload CV" button. Below the "Upload CV" button, it states "Max 2 MB, doc, docx, rtf, pdf" and "We will fill your details".

At the bottom of the page, there are several promotional and utility elements:

- Buttons for "HIRING" and "APPLY NOW".
- Logos for "Shell", "genpact", and "Synchro".
- A section for "Top Employers" featuring the "virtusa" logo.
- A section for "Best Places to Work" with tabs for "All Sectors", "Information Technology", "Manufacturing", and "Services".
- A green button labeled "Create a Job Alert" with the text "Get best matched jobs on your email. No registration needed" above it.

# Key operating metrics for Naukri

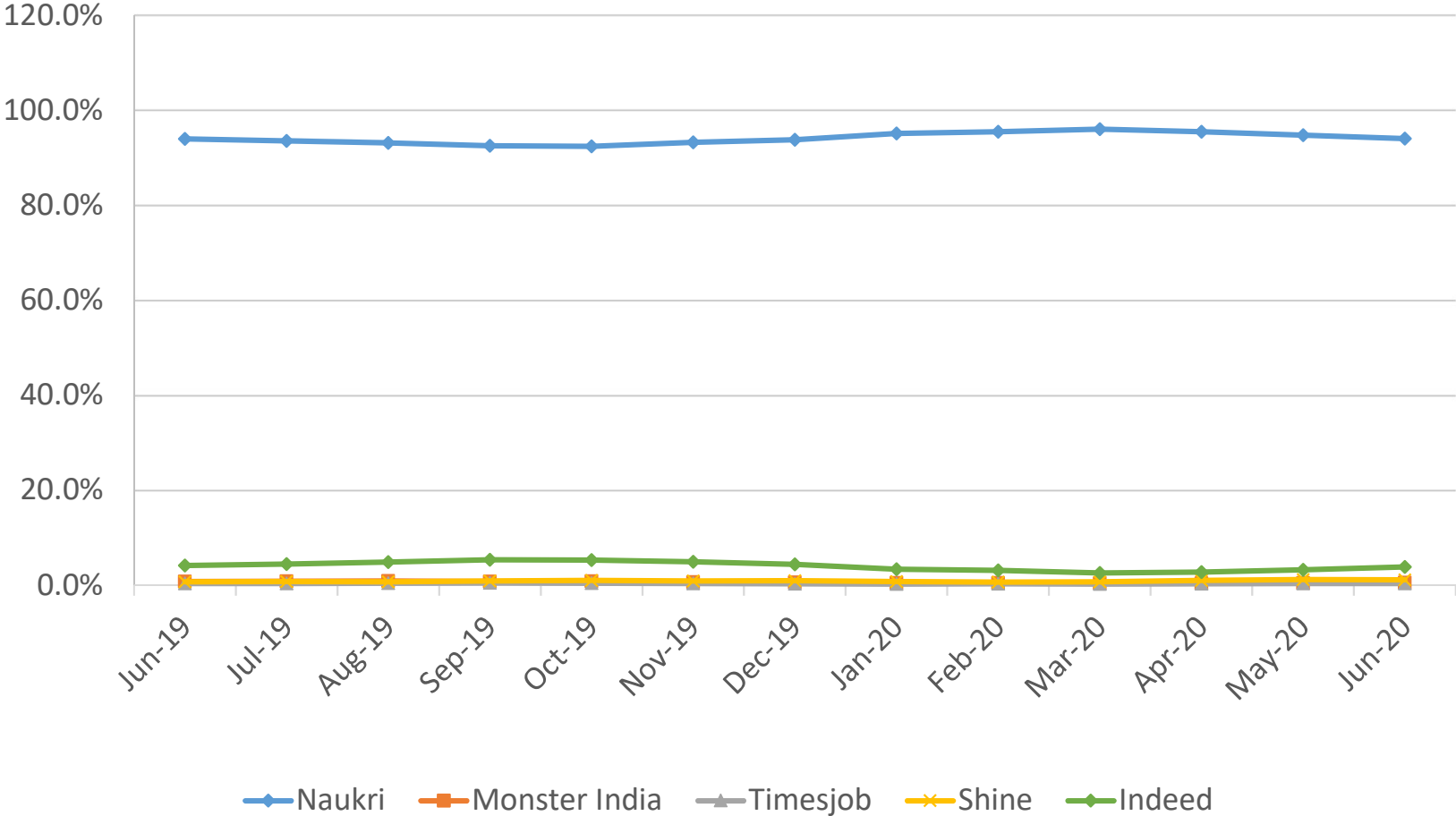


\* Comparison among traditional job-boards (excludes LinkedIn and Indeed)

# Based on IND-AS revenue

# Naukri traffic share among traditional job sites

Overall traffic (from desktops, web mobile& app) on time spent

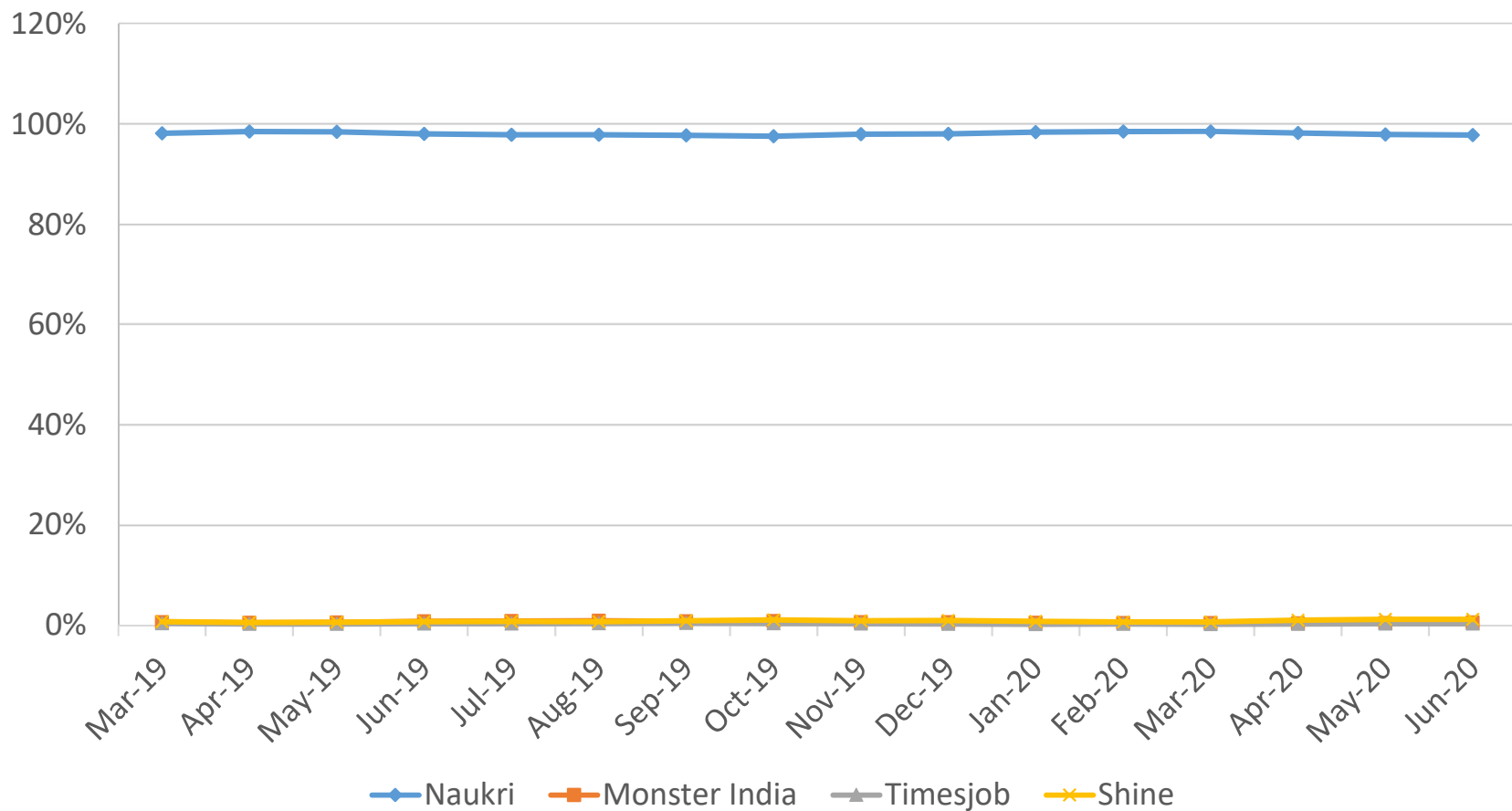


Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs  
 Similarweb revised the algorithm for calculating time share through app in Q3'20

# Naukri traffic share among traditional job sites

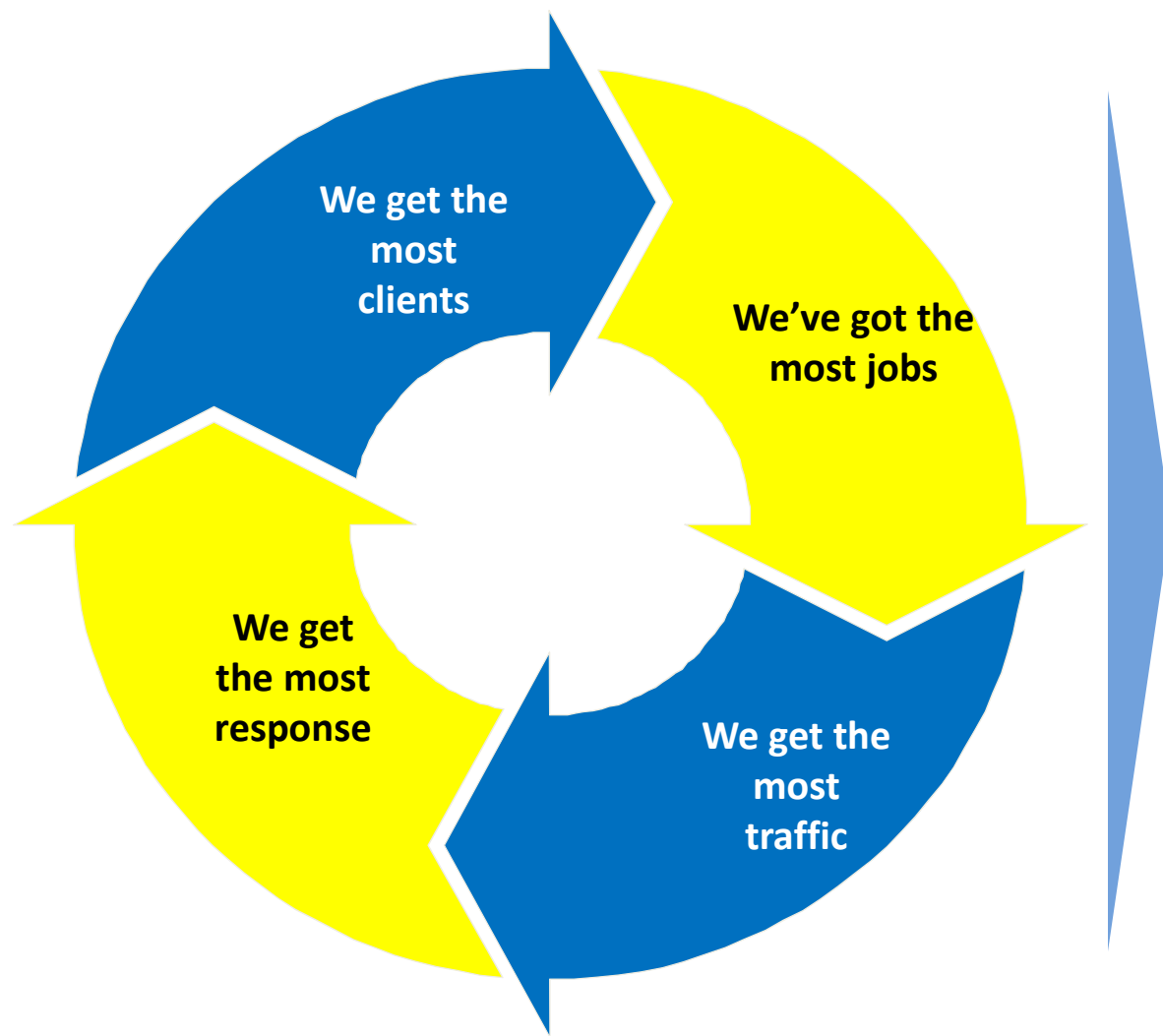
Overall traffic (from desktops, web mobile& app) on time spent



Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs  
Similarweb revised the algorithm for calculating time share through app in Q3'20

# Naukri is a business of the virtuous circle



## Benefits

- Naukri has over 100% of industry profits enabling greater investment in
  - Product innovation
  - Engineering
  - Brand support
  - Sales network
  - Servicing back office
  - Superior talent

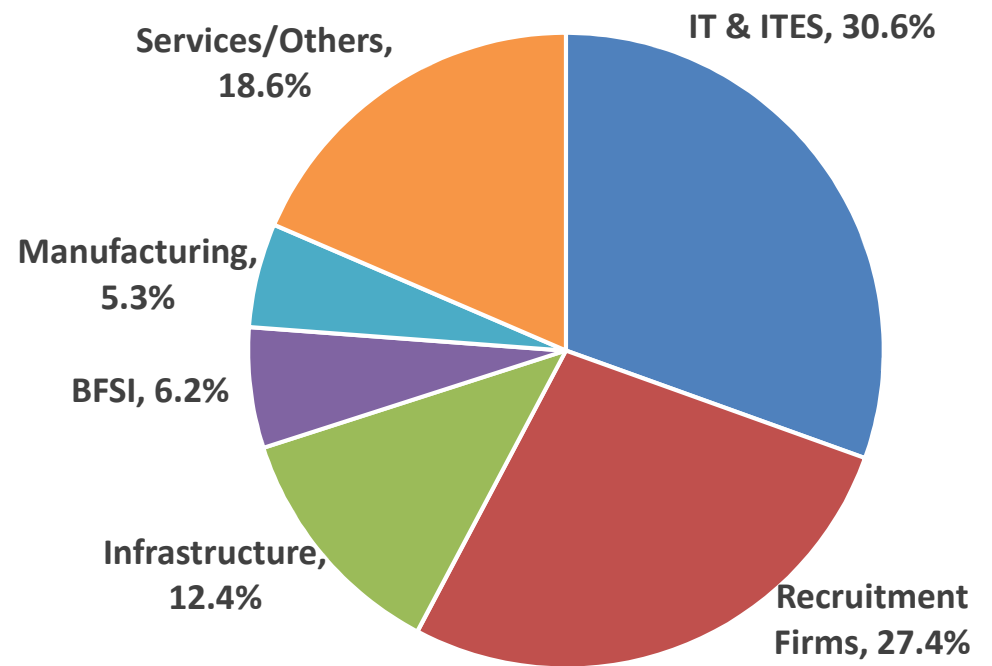
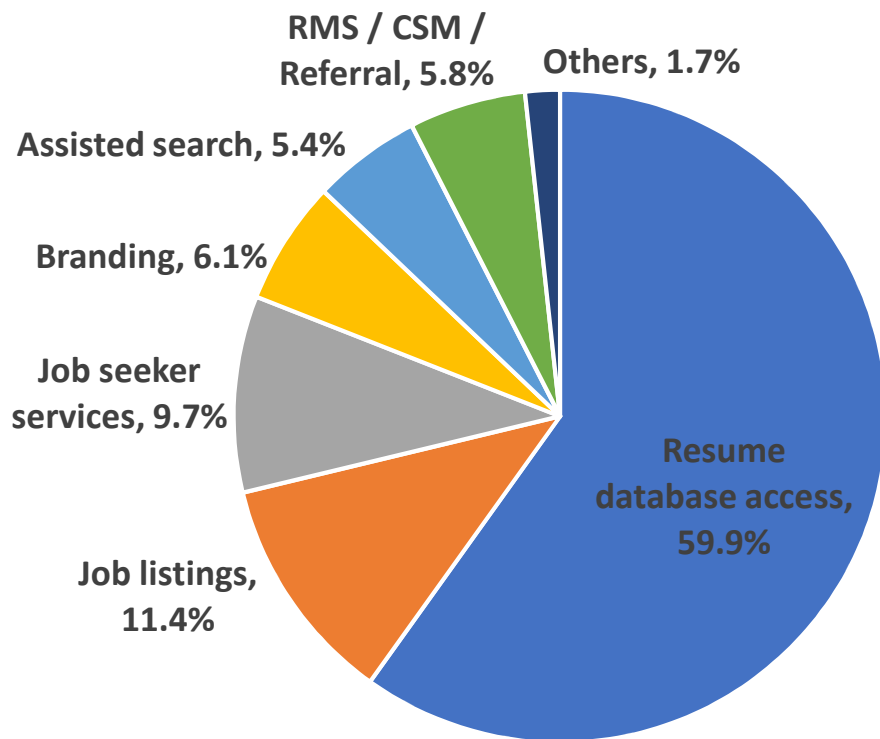


# Revenue sources for Naukri

- B2B revenues ( as on date) comprise ~90% of overall Naukri revenue and includes:
  - Resume database access
  - Job listing (response management)
  - Employer branding (visibility)
  - Career site manager
  - Others - Resume short listing and screening, campus recruitment
  - Non recruitment advertising (other than for jobs)
- B2C includes revenue from
  - Job seeker services

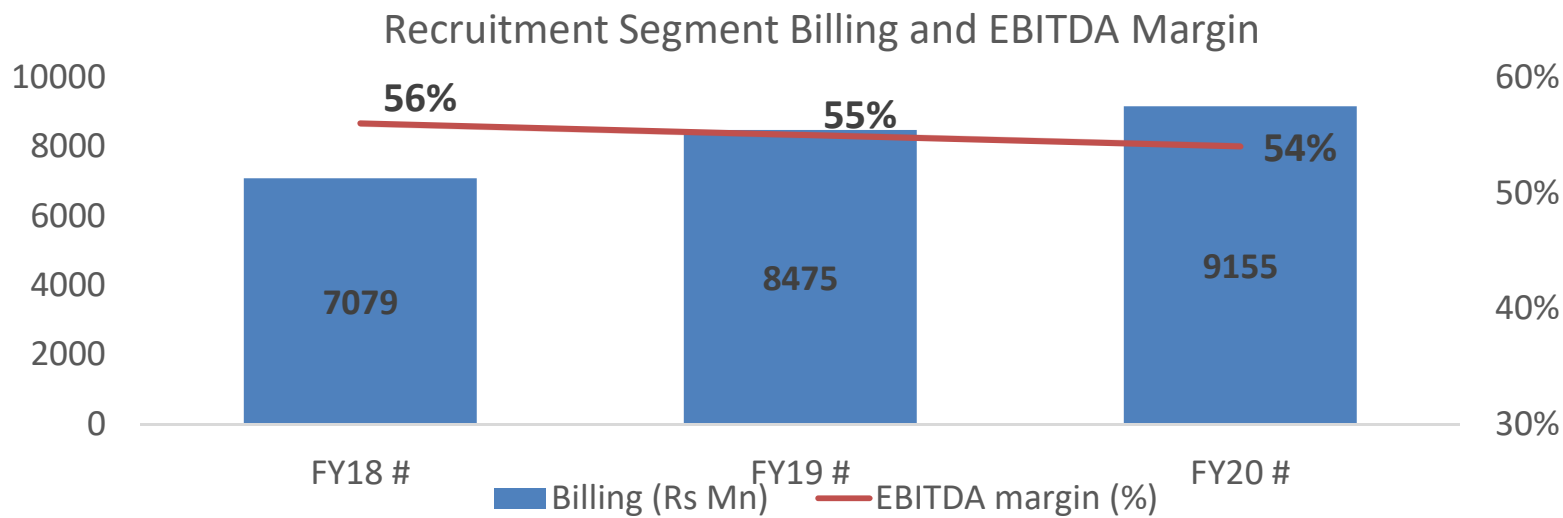
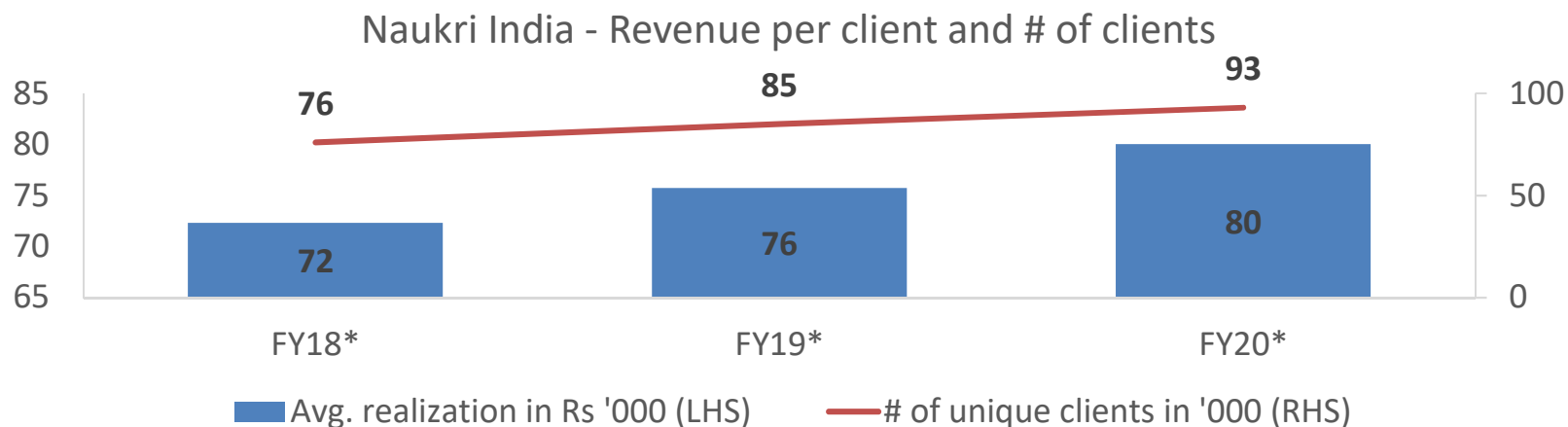
# Breakdown of revenue by Product and Industry

Data for trailing 12 months to June 2020



~50% of consultants caters to IT/ ITES industry. Accordingly, IT and ITes contributes ~42-44% of overall revenues.

# Increasing realization per unique client with increasing number of customers



• # FY18 – FY20 numbers as per IND-AS. Above numbers are segmental business numbers for Naukri..

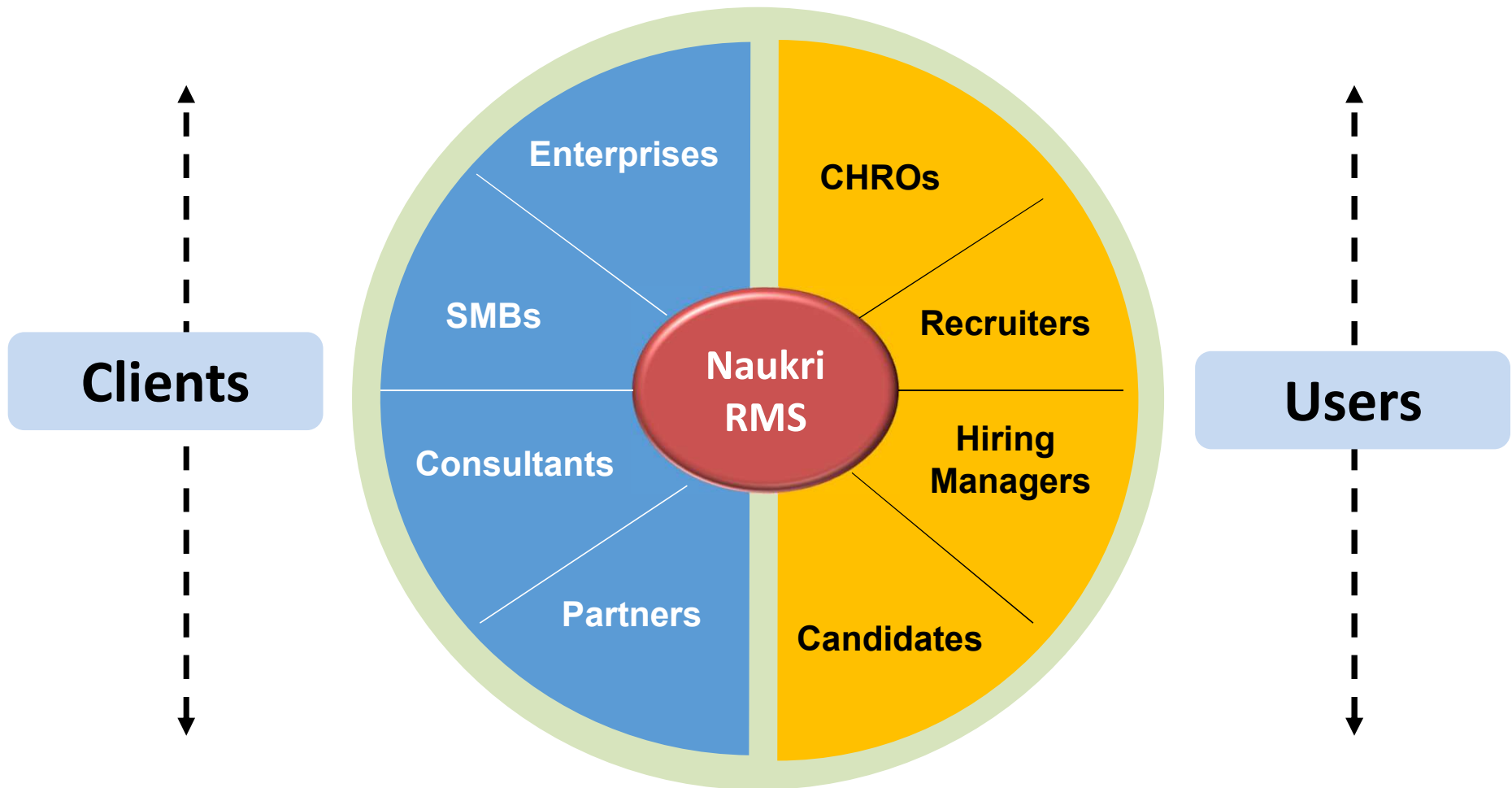
# Naukri Investment strategy



# iimjobs.com

- IEIL acquired 100% stake of High Orbit Careers Pvt Ltd (Domain: iimjobs.com) in all cash deal in June'19.
- iimjobs.com is India's leading recruitment platform for management and engineering professionals
- Catering to 400+ Corporate Customers – across various industries.
- Consistent billing growth of 20% for last 3 FY.
  - FY'18 – Rs 149 Mn
  - FY'19 – Rs 182 Mn
  - FY'20 – Rs 218 Mn.

# RMS – empowering recruitment ecosystem



- *The career site helps Naukri become part of a much larger ecosystem with thousands of connected corporate sites and RMS would help power the whole recruitment ecosystem*

# Naukri RMS



**naukri**  
**RMS** | RECRUITMENT  
MANAGEMENT  
SYSTEM

**EVOLVE**  
TO A NEW AGE  
**RECRUITMENT SOLUTION**

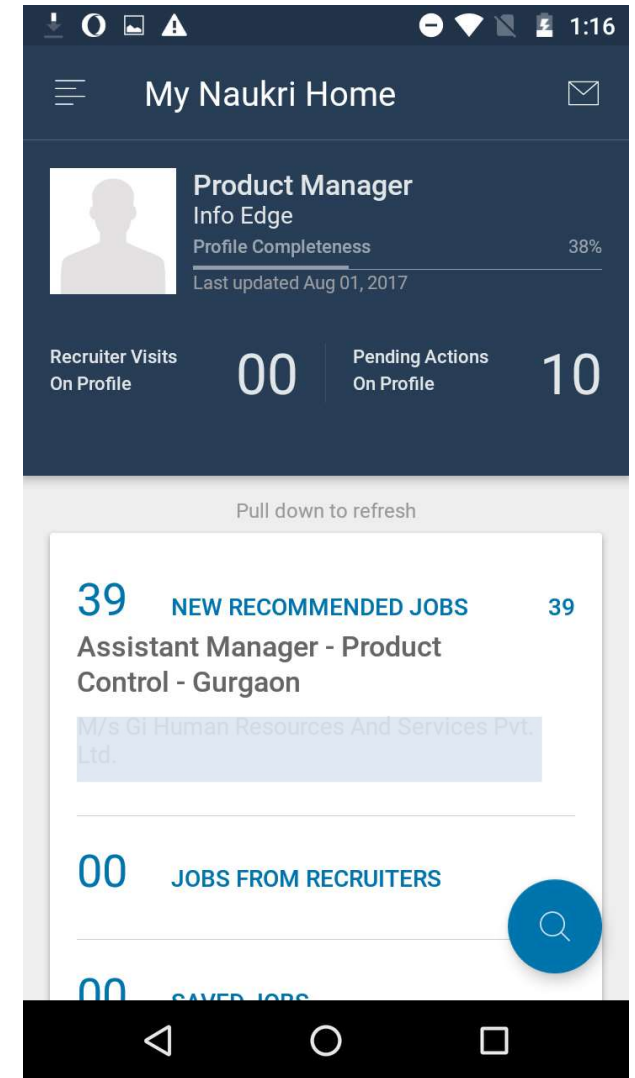
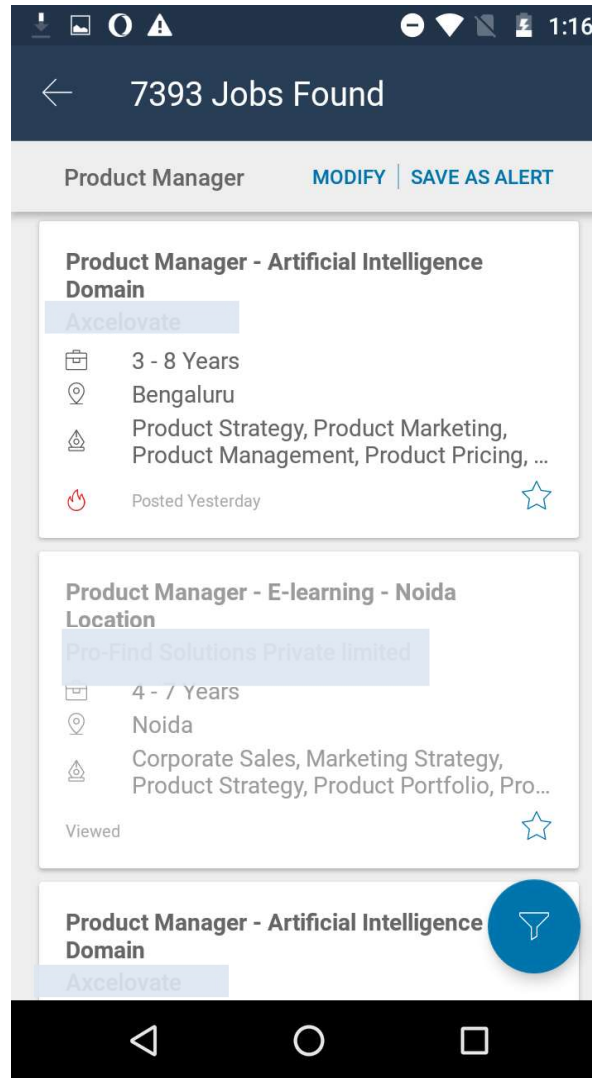
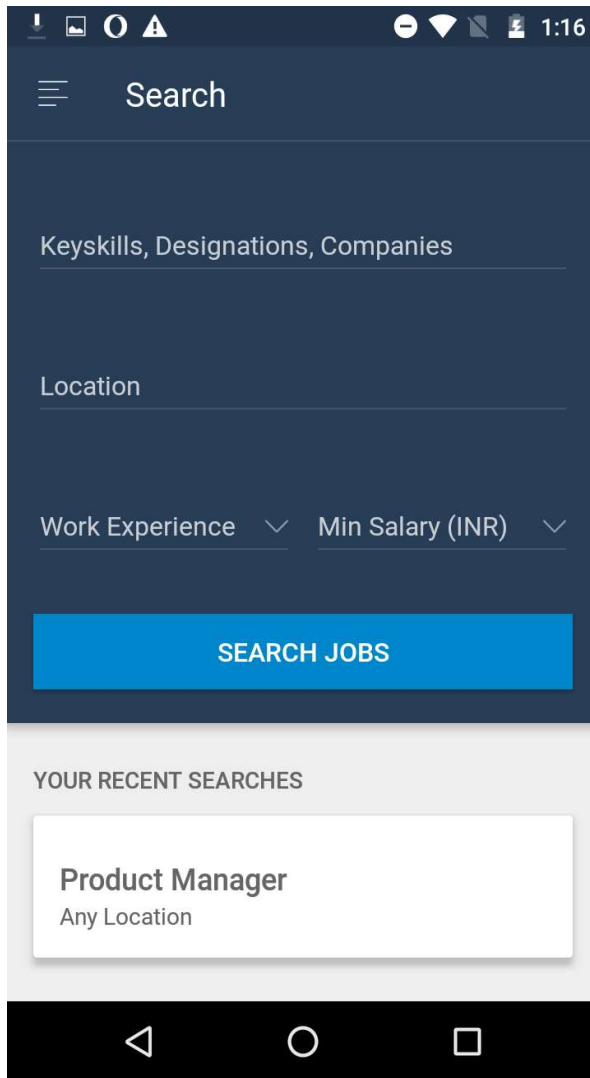
Automates hiring process, right from  
requisition to offer

**naukri**  
**RMS** | ENTERPRISE

**naukri**  
**RMS** | CONSULTANT

**naukri**  
**RMS** | REFERRAL

# The App and HTML5 site





# 99acres

**99acres** India's No.1 Property Portal

ALL INDIA ▾

DOWNLOAD APP CUSTOMER SERVICE SELL / RENT PROPERTY HOME LOANS

BUY RENT PROJECTS COMMERCIAL DEALERS

All Residential ▾ Type Location or Project/Society or Keyword

SEARCH MAP SEARCH

Get personalized property suggestions on a single tap

GET IT ON Google Play Download on the App Store

The GSF Mobile Appies Awards Winner 2015 REAL ESTATE CATEGORY

**99acres** India's No.1 Property Portal

Get the App

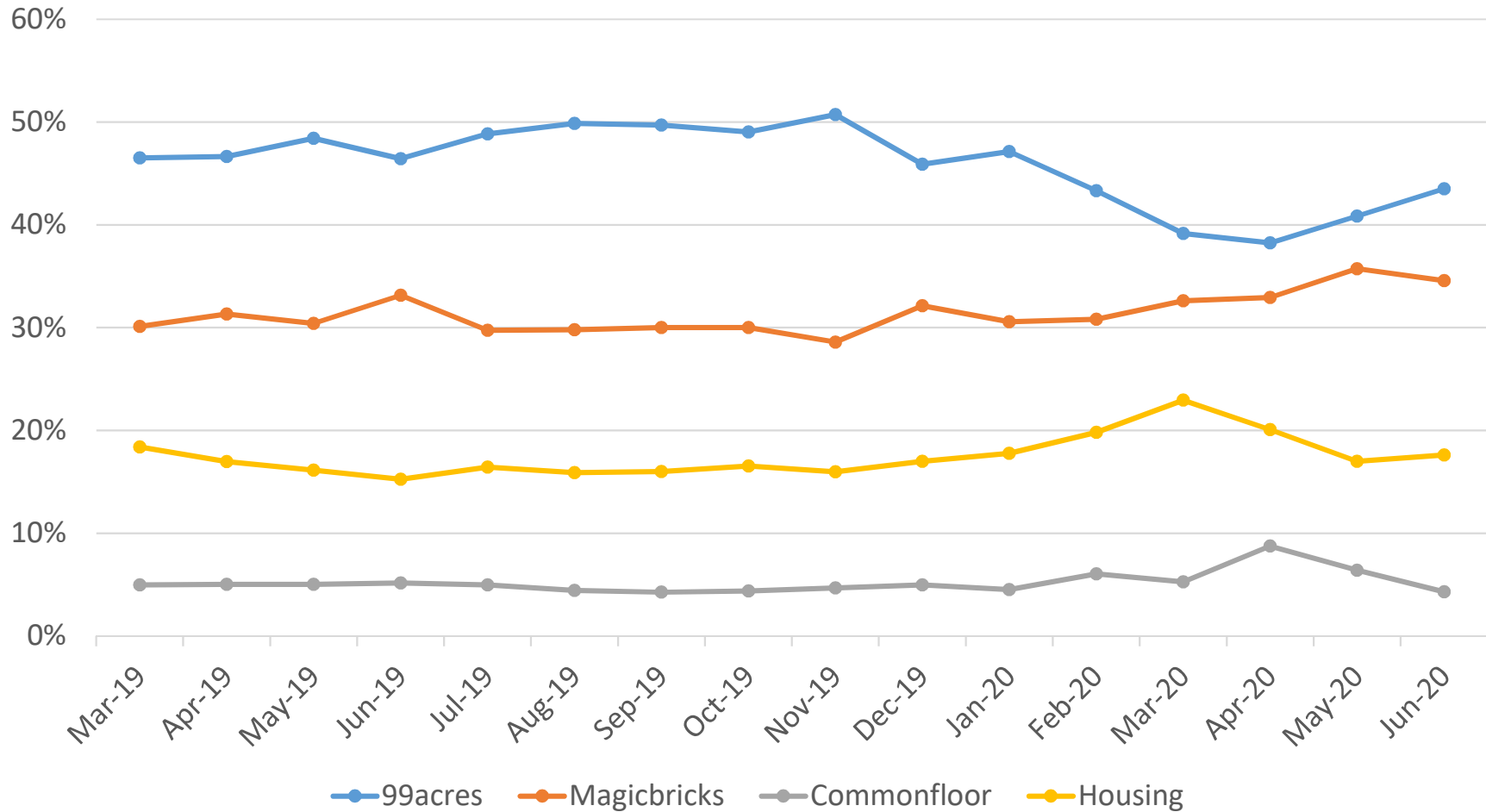
<p><b>BOOK YOUR DREAM ADOBE IN THE HEART</b> of Dubai Pay After Handover</p>	<p><b>INVEST IN DUBAI FOR LUXURY APARTMENTS</b> for Prices contact 971562998939</p>	<p><b>SPRING VALLEY DEW KATARA HILLS</b> Bhopal @ 18.26 lakhs onwards</p>	<p><b>AVINASI NAYA RA</b> Ready to r Apartment</p>
--	---	---	--

# Online Real Estate marketing business in India

- Real estate is one of the largest spender on advertising in print media
- Our estimate of spend on online real estate portals is about Rs 6.0-7.0 bn in FY 19-20 (excluding Google and Facebook)
- 99acres, a leader in this category
  - Google, Facebook and local classifieds sites (like Olx and Quikr) also compete for this market
- Access through mobile app increasing consistently

# 99acres traffic share

Overall traffic (from desktops & laptops, web mobile) based on time share

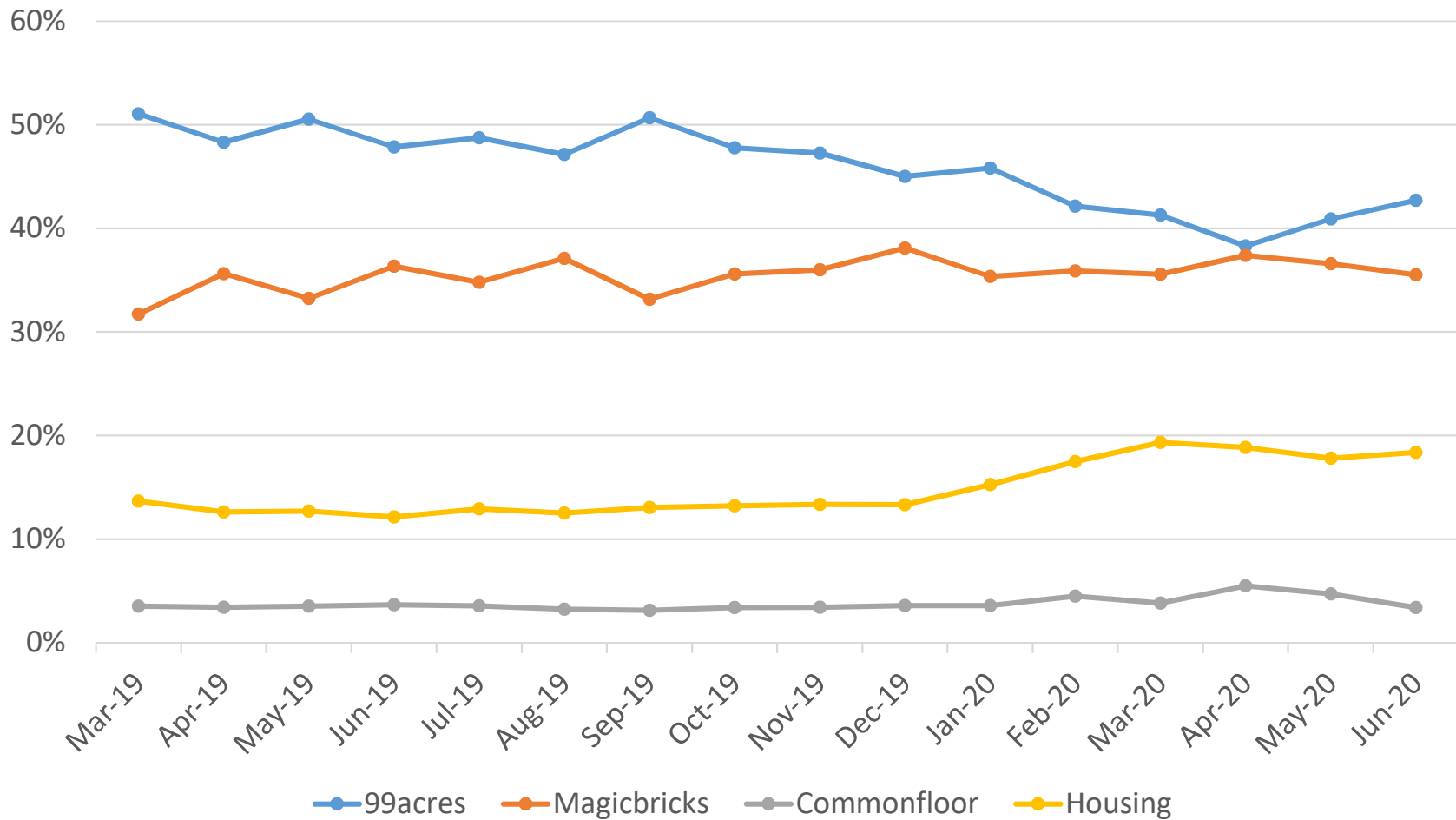


Source: SimilarWeb

Similarweb revised the algorithm for calculating time share through app in Q3'20

# 99acres traffic share

Overall traffic (from desktops & laptops, web mobile and App) based on time share



Source: SimilarWeb

Similarweb revised the algorithm for calculating time share through app in Q3'20

# 99acres business model



## Revenue Model

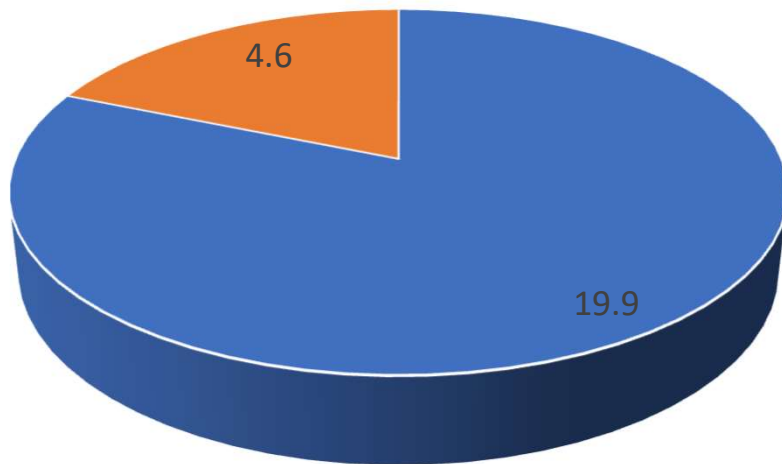
- Projects
  - Listings
  - Featured listings
  - Microsites
  - Email campaigns
  - Banner Ads
- Re-sale
  - Listings
  - Featured listings
- Rental
  - Listings
  - Featured listings

## Key business metrics for 99acres (Q1)

- **As of June 30, 2020**
  - Total projects 1,72,417 + (under construction or ready-to-move-in)
  - Total listings 9,32,388 (including 4,98,037 owner listings)
    - Residential 7,67,689
    - Commercial 1,64,699

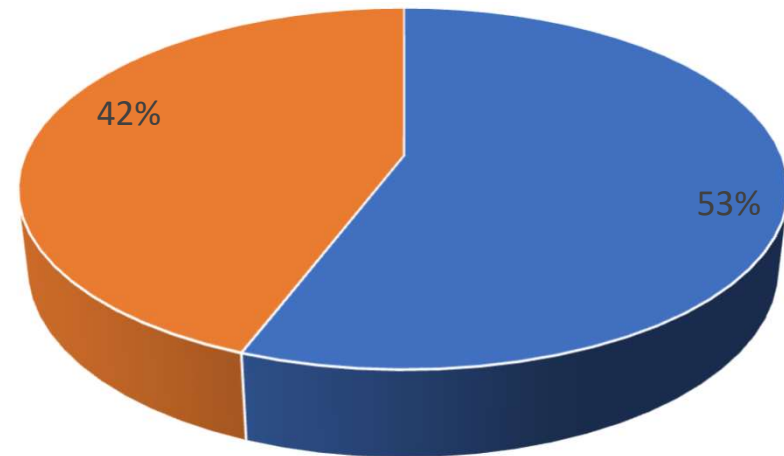
# Break-down of Customers and Billing

No. of customers in '000



■ BROKER ■ BUILDER

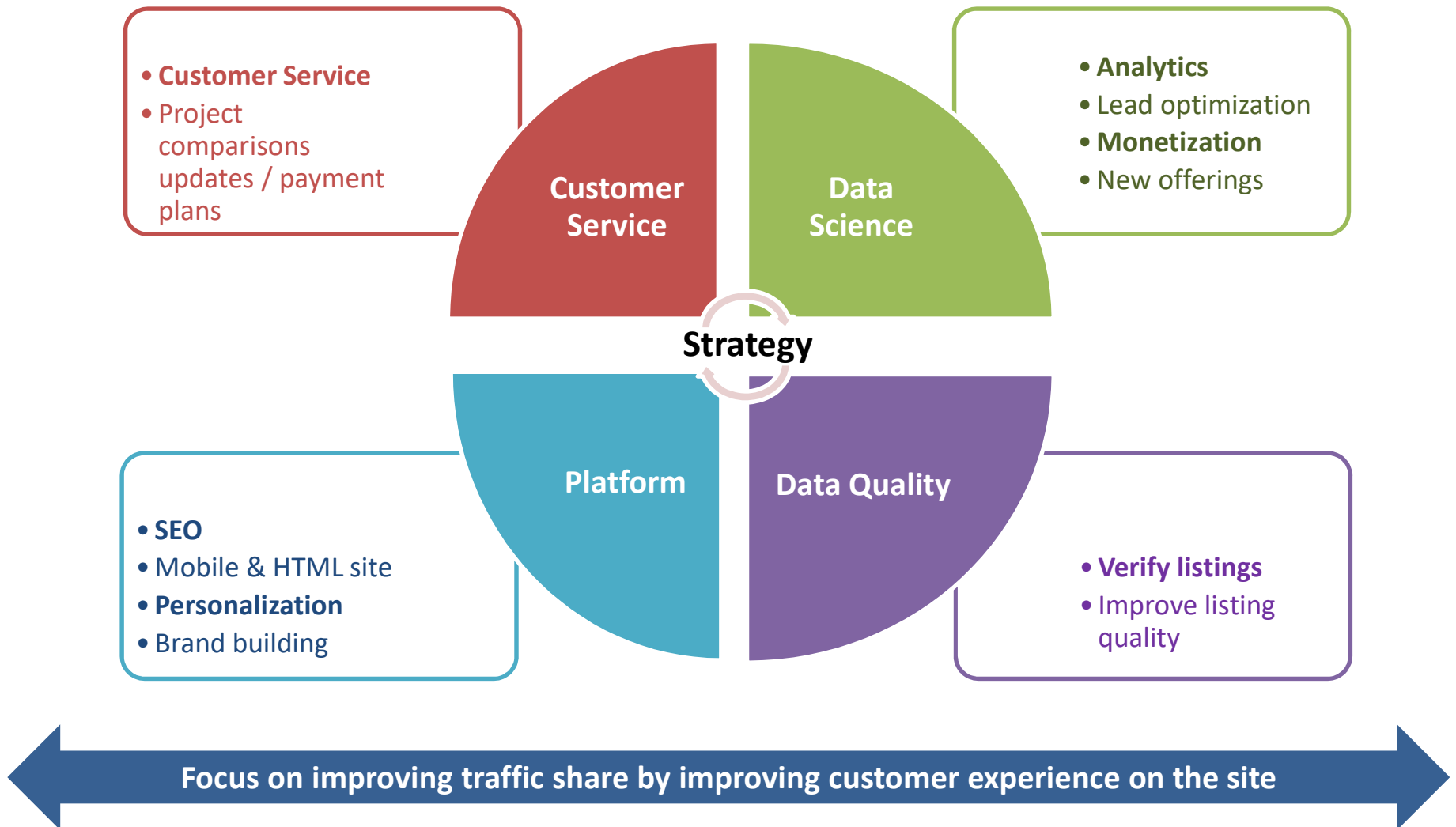
Billing breakdown by customer type



■ BROKER ■ BUILDER

*Data for trailing 12 months to June 2020*

# 99acres –strategy



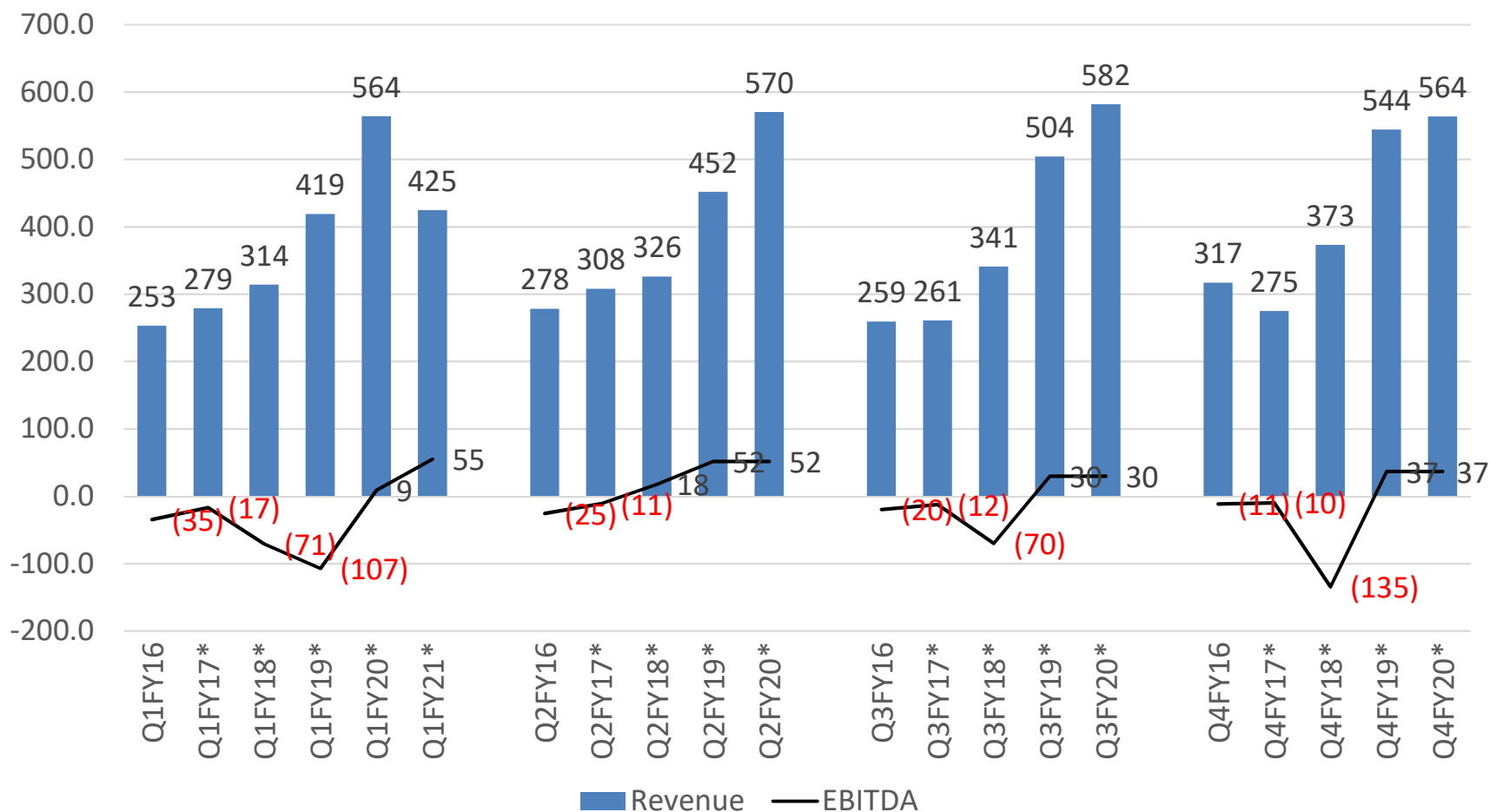


## 99 acres Peer Comparison

- **Leadership position maintained**
  - We have maintained highest traffic share for 99acres for past several quarters
  - To ensure data quality, innovation and customer retention, we have increased our investments in product / data quality / marketing
- **Listings growth intact**
  - Listings growth on 99acres has remained intact, primarily driven by broker segment.
- **Aggressive marketing spends by competitors**
  - Significant increase in marketing spends by competitors Magicbrick and Housing.

# 99 acres – Quarterly Financials

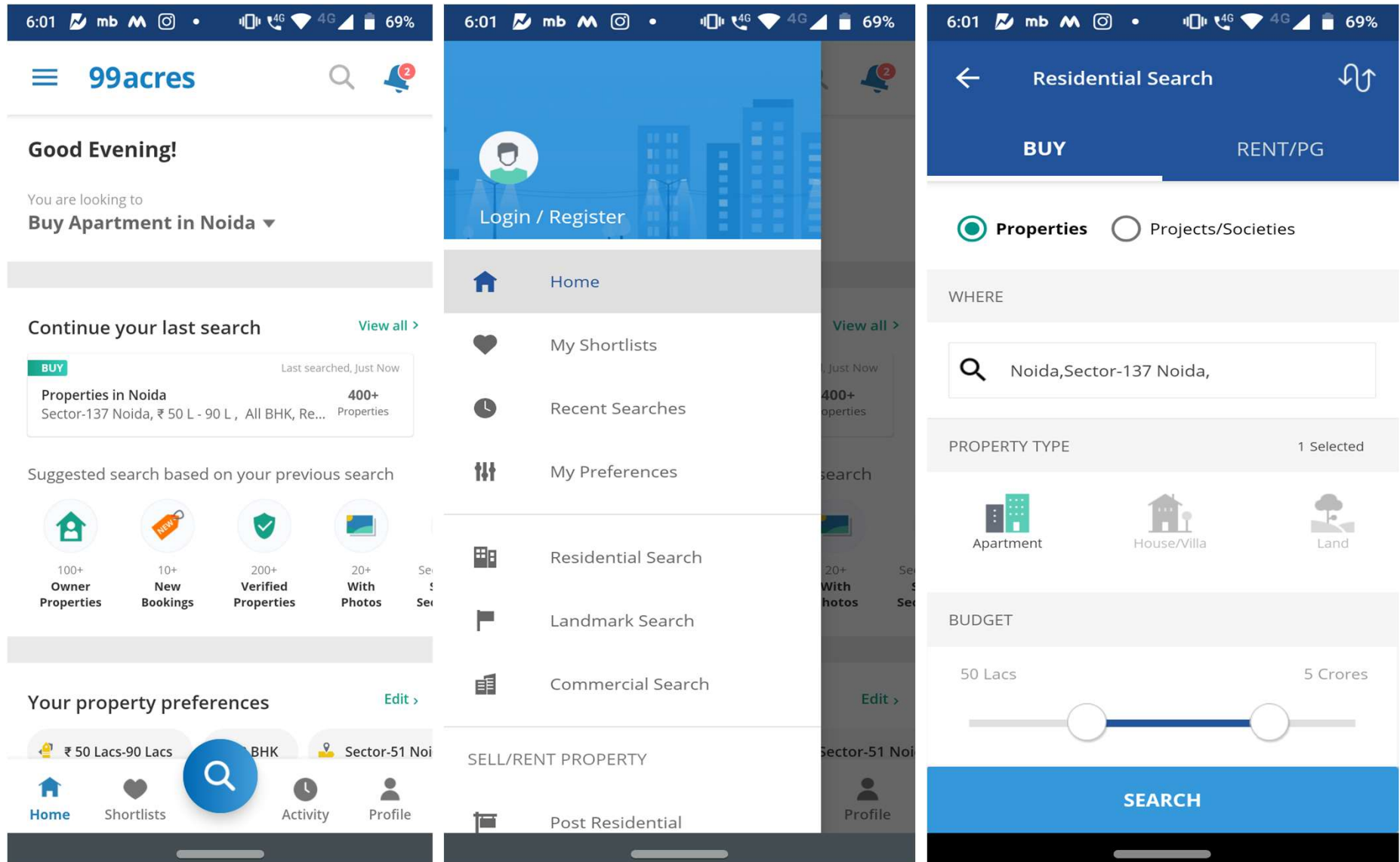
99acres Quarterly Revenue (Rs Mn) and EBITDA (Rs Mn)



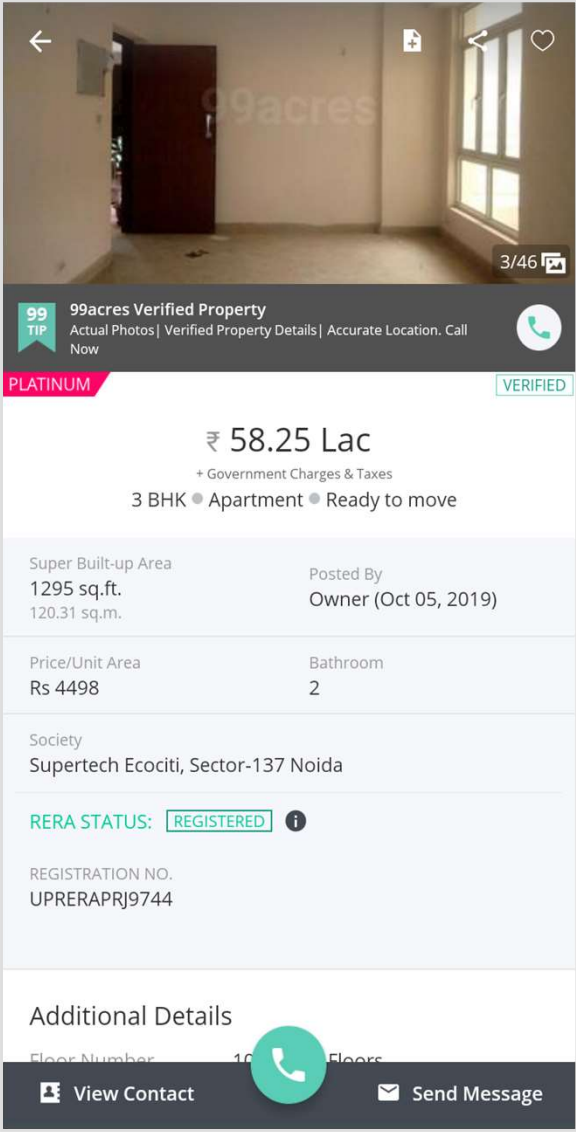
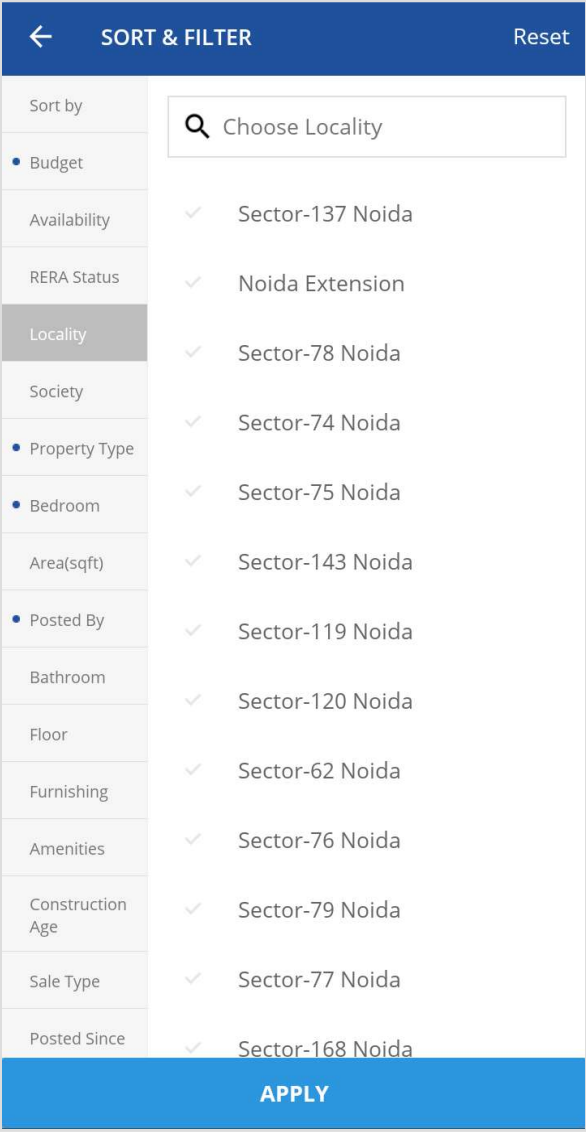
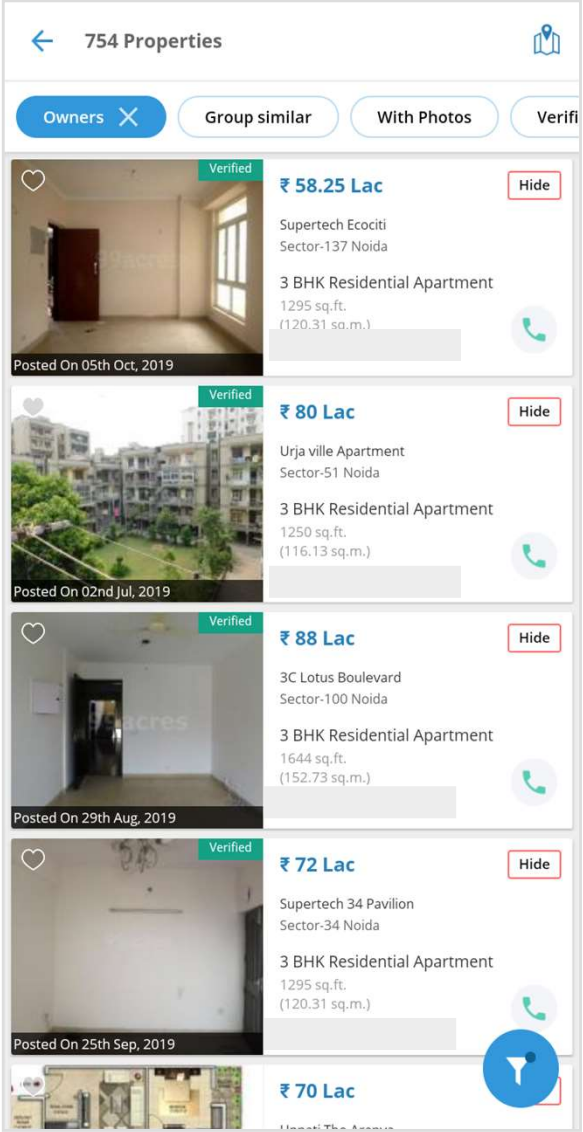
99acres cumulative cash loss (management estimate) at Rs 2541 MN. Above numbers are segmental financials for 99 Acres business.

- FY18 onwards numbers are EBITDA numbers (adjusted for non-cash ESOP charges) as per IND-AS; All others in I GAAP
- FY20 onwards EBITDA numbers includes the impact of IND AS 116.

# Mobile app – home screen, navigation and search infoedge




# Mobile app - Property search results page, filter page, property detail page



# Mobile app – project search results page, project detail page and property posting form

← 232 Projects

- RERA REGISTERED**




**ATS Pious Hideaways**  
Sector-150, Noida

₹ 63 - 79.56 Lac  
₹4500/Sq.Ft. Onwards

Mar 2026

3 BHK Apartment
- RERA REGISTERED**




**TATA Eureka Park**  
Sector-150, Noida

₹ 59.5 - 85.19 Lac  
₹5289/Sq.Ft. Onwards

Mar 2023

2,3 BHK Apartment
- RERA REGISTERED**

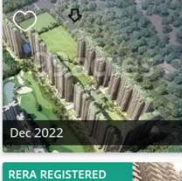


**ATS Picturesque Reprieves**  
Sector-152, Noida

₹ 87.88 Lac - 1.52 Crore  
₹4750/Sq.Ft. Onwards

Oct 2024

3,4 BHK Apartment
- RERA REGISTERED** Seen

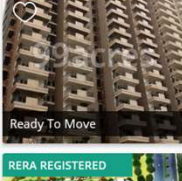


**ATS Le Grandiose**  
Sector-150, Noida

₹ 74.75 Lac - 1.52 Crore  
₹4600/Sq.Ft. Onwards

Dec 2022

3,4 BHK Apartment
- RERA REGISTERED**




**Gaur City 2 14th Avenue**  
Noida Extension, Noida

₹ 23.1 - 53.52 Lac  
₹3100/Sq.Ft. Onwards


Ready To Move

1,2,3 BHK Apartment
- RERA REGISTERED**



**ACE Parkway**  
Sector-150, Noida

Sort & Filter



**ATS Pious Hideaways**  
Sector-150 Noida

Construction status  
**Under Construction**  
Mar 2026

Builder Name  
**ATS Builders**

Unit Configuration  
**3 BHK Apartment**

Project Details  
**12 Towers, 749 Units  
32 Floors**

Total Project Area  
**17.80 Acres**  
(72034.1 sq.m.) **80% Open**

Rera Status  
**REGISTERED**

Rera Details  
**UPRERAPRJ442430**  
<http://up-rera.in/>

**Floor Plans**

<b>3 BHK Apartment</b> 1400 sq.ft.(130.1 sq.m.)	<b>3 BHK Apartment</b> 1615 sq.ft.(150 sq.m.)	<b>3 BHK Apartment</b> 1675 sq.ft.(155.6 sq.m.)
--	--	--

Brochure Send Message

← Sell / Rent Property

BASIC INFORMATION > PROPERTY DETAILS

I WANT TO

Sell property Rent-out property

YOUR PROPERTY TYPE

Apartment Builder Floor Plot/Land House

ADD YOUR PROPERTY PHOTOS

+ Add Photo

YOUR PROPERTY ADDRESS

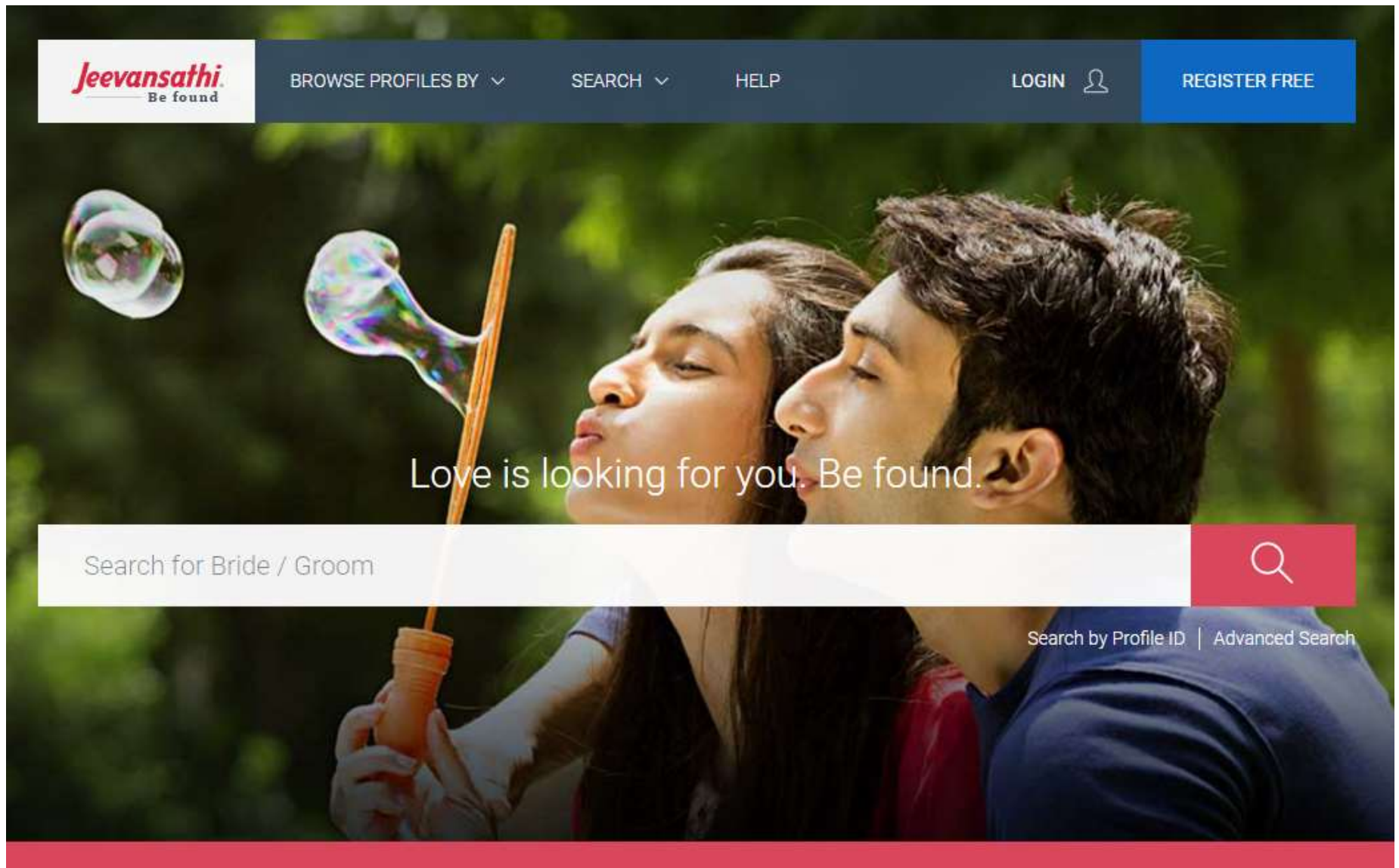
Detect my location

City

Locality

NEXT





# Online matrimonial business - India

- Online spend by users estimated to be ~Rs 7-8 bn in FY '19-20.
- Three main players – Bharat matrimony, Shaadi and Jeevansathi
- Used primarily by
  - Those disconnected from mother community
  - Youngsters looking for choices
  - Families for match-making
- Fragmented market basis
  - Geography
  - Communities (religion, caste, sub castes)

# Jeevansathi business model

- **Jeevansathi is a freemium model, wherein**
  - Users do not pay for listing, searching, expressing interest and accepting others' expression of interest
  - Payment is required to contact the other person
- **Offline centres**
  - Walk in sales for matching services
- **Franchise - walk in centers**

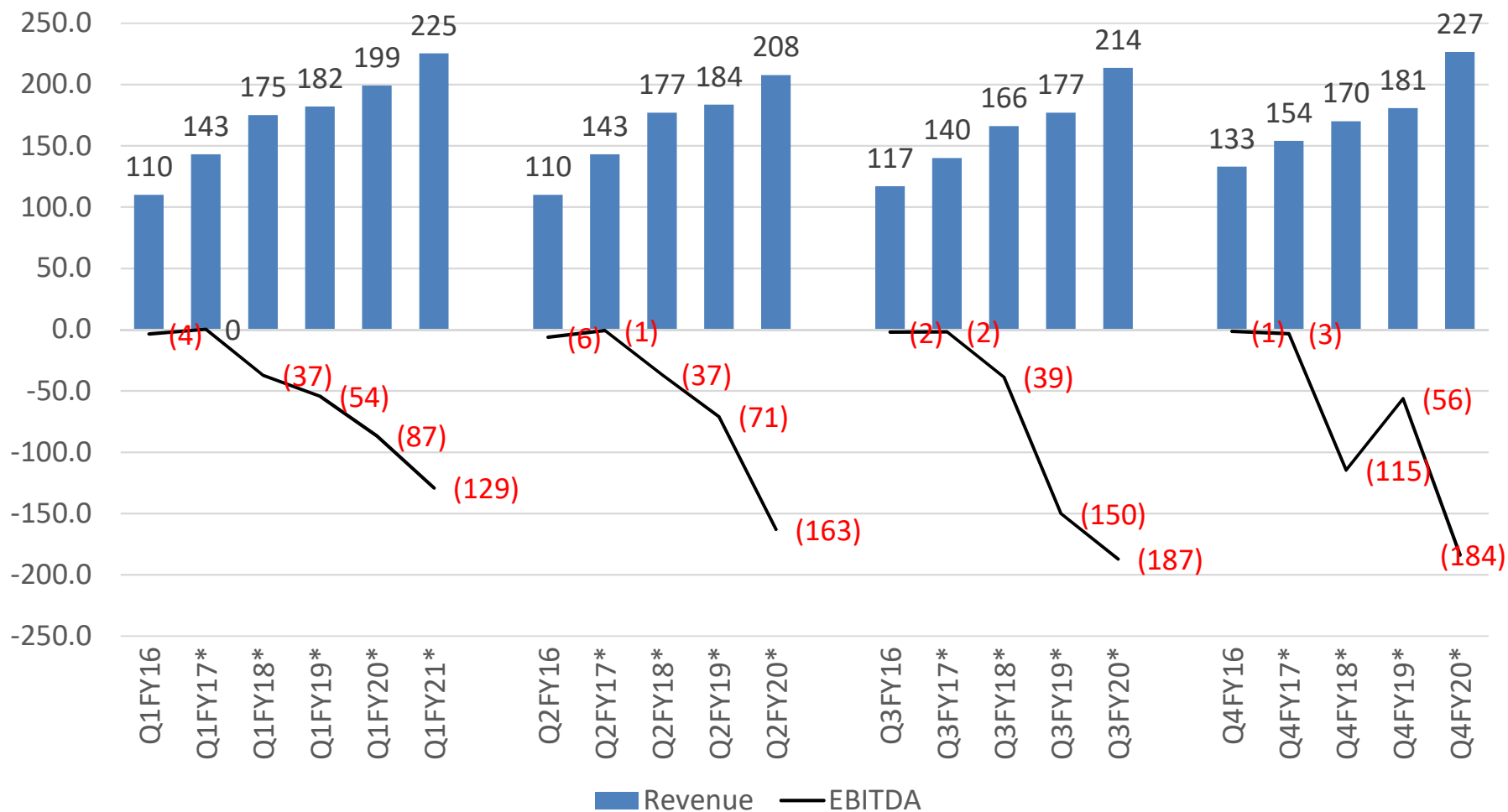


# Mobile app



# Jeevansathi – Quarterly financials

Jeevansathi Quarterly Revenue (Rs Mn) and EBITDA (Rs Mn)



Jeevansathi cumulative cash loss (management estimate) at Rs 1542 MN. Above numbers are segmental financials for JS business.

- FY18 onwards numbers are EBITDA numbers (adjusted for non-cash ESOP charges) as per IND-AS; All others in I GAAP
- FY20 onwards EBITDA numbers includes the impact of IND AS 116.

**shiksha** MBA ▾ ENGINEERING ▾ LAW ▾ DESIGN ▾ MORE COURSES ▾ STUDY ABROAD ▾ COUNSELLING ▾ [Ask](#) [Login](#) | [Sign Up](#)

**COLLEGES** EXAMS QUESTIONS <sup>New</sup> CAREERS

Find colleges, universities & courses Enter location **Search**

**Indus Business Academy ( IBA ), Bangalore** (view details)

**Featured**

<b>Garden City University</b> Bangalore Emphasis on Life	<b>Birla Global University</b> Bhubaneswar MBA Admissions 2018	<b>International Management Institute</b> Kolkata 100% Placement Record	<b>SRM</b> Chennai   Amaravati   Delhi Ncr Apply Now SRMJEEE 2018	<b>T. A. Pai Management Institute (TAPMI)</b> Manipal Last Date to Apply 11th Feb 18
--	--	--	---	---

A website which helps students decide undergraduate and post graduate options, by providing useful information on careers, exams, colleges & courses

## Industry Highlights

- Education as a category spends amongst the highest in print
  - Spend in print estimated to be similar to real estate
- Online , School/College contact programs, Consultant commissions & fairs form bulk of remaining marketing spends by colleges and Universities
- Growing number of online players

## Business Model

- Branding & advertising solution for colleges & universities (UG, PG, post PG)
  - Both Indian and foreign entities
  - Large number of Indian students go overseas for higher education
- Lead generation
  - Potential student details bought by colleges and their agents
  - Full counselling service for international university partners
- Prospective students have free access to all information on the site (some post registration)

- Domestic Colleges – 47,827 , Courses – 272,393 , #Reviews – 197,249 , Exams – 664
- Study Abroad Universities – 1900 from 52 countries, Courses – 21,830, Scholarships - 2333



### MBA EXAMS

50+ MBA exams. Do you know enough about them?

Know important dates, preparation tips, syllabus and more



### COLLEGE REVIEWS

Nobody knows a college better than its alumni and students.



### MBA RANKINGS

Curious to know the top MBA colleges?



### IIM CALL PREDICTOR

IIMs consider a lot more than just the CAT score



### FIND MBA COLLEGES

Want to find the right MBA college for you?



### ASK CURRENT MBA STUDENT

Have college specific questions?



### ALUMNI SALARY DATA

Wondering about your career journey post-MBA?



### COMPARE COLLEGES

You always have options. Did you choose the right one?



# Authentic College Reviews

## Manipal Academy of Higher Education, Manipal - Reviews (378)

Filter by :

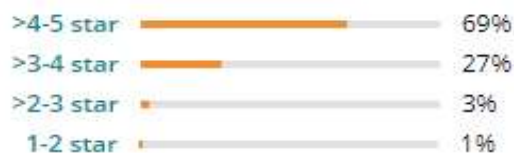
Select college

Select course

4.3



Based on 378 Reviews



- 4.0 Placements
- 4.7 Infrastructure
- 3.9 Faculty & Course Curriculum
- 4.8 Crowd & Campus Life
- 4.0 Worth the Money



All 378 reviews have been published only after ensuring that the reviewers are bona fide students of this college.

Sort By :

Recency

Year of Graduation ↓

Highest Rating

Lowest Rating

Relevance

5.0 ★★★★★ One of the best dental colleges of our country that's define it all.

by Sourabh, 17 May 2018 | Bachelor of Dental Surgery - Batch of 2022

Placements 5/5

Infrastructure 5/5

Faculty & Course Curriculum 5/5

Crowd & Campus Life 5/5

Worth the Money 5/5

**Placements** : According to the senior batches the placements are great. Nearly 70-75 percentage of students were placed (not so sure). No idea about the salary but they get a good sum of money. They have foreign collaborations with many companies. MS, professor etc. Various roles are offered.

**Infrastructure** : 24 hours Wi-Fi, Library is great with ample amount of books, Classrooms are neat and mainly smart classes are held. Quantity of labs are great. Quality of food is also good. Hostel rooms are great. Medical Facilities are

# Campus representatives from colleges for credible advice



MBA

ENGINEERING

DESIGN

OTHER COURSES

STUDY ABROAD

COUNSELLING



Log in | Register

Home > MBA > Resources > Campus Connect

## Campus Connect - Ask Current Students before making a college decision

A banner image showing a group of diverse college students smiling and looking towards the camera. The image is slightly blurred to make the text overlay stand out.

**Ask Current Student Directly**  
Find all about college admissions, placements, campus life & more

**Know the Inside-Story**  
Catch the latest buzz on 400+ colleges & what others are talking about

Search by college name to ask or view questions

## Domestic

- Print Media
- Online
  - Google
  - Pagalguy
  - HTcampus
  - Minglebox
  - Careers360
  - MBA Universe
  - CollegeDekho
  - CollegeDunia
  - Sarvgyan
  - Aglasem
  - Others

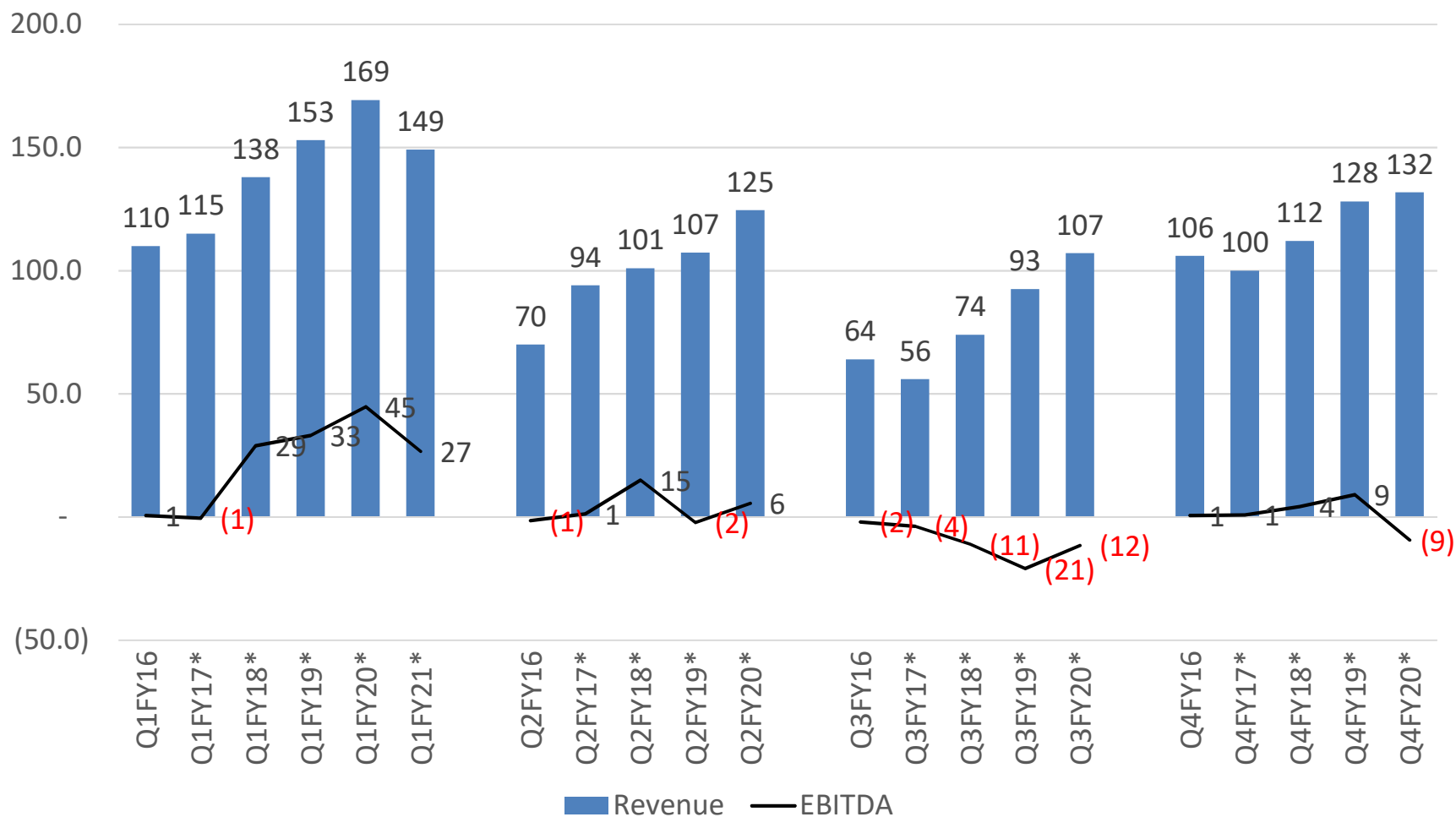
## Study abroad

- Online
  - HotCourses India/IDP
  - Studyportals
  - Masterstudies
  - Top mba / Top universities (QS)
  - Collegeboard
  - Yocket
  - Multiple Emerging start-ups
- Study Abroad consultants



# Shiksha – Quarterly financials

Shiksha Quarterly Revenue (Rs Mn) and EBITDA (Rs Mn)



Shiksha cumulative cash loss (management estimate) at Rs 367 MN . Above numbers are segmental financials for Shiksha Business.

- FY18 onwards numbers are EBITDA numbers (adjusted for non-cash ESOP charges) as per IND-AS; All others in I GAAP
- FY20 onwards EBITDA numbers includes the impact of IND AS 116.

# Investments

# Investment Portfolio

Investee Company	Website	Book value of investment as of Sept'10, 2020 ( Rs Mn)	Approx. diluted and converted shareholding % (Actual)
Zomato Media Pvt Ltd.	<a href="http://www.zomato.com">www.zomato.com</a>	1,522	22.20%
Etechaces Marketing and Consulting Pvt Ltd.	<a href="http://www.policybazaar.com">www.policybazaar.com</a>	5,758	15.10%
Happily Unmarried Marketing Pvt Ltd.	<a href="http://www.happilyunmarried.com">www.happilyunmarried.com</a>	323	29.99%-32.71%
NoPaperForms Solutions Private Limited	<a href="http://www.nopaperforms.com">www.nopaperforms.com</a>	337	48.10%
International Educational Gateway Private Limited	<a href="https://www.univariety.com/">https://www.univariety.com/</a>	205	37.90%
Agstack Technologies Private Limited	<a href="http://www.gramophone.in/">http://www.gramophone.in/</a>	204	33.21%
Bizcrum Infotech Private Limited	<a href="https://www.shoekonnect.com">https://www.shoekonnect.com</a>	213	28.22%
Medcords Healthcare Solutions Private Limited	<a href="http://www.medcords.com/">http://www.medcords.com/</a>	96	15.76%
Printo Document Services Private Limited	<a href="http://www.printo.in/">http://www.printo.in/</a>	159	25.12%
Shop Kirana E Trading Private Limited	<a href="http://shopkirana.com/">http://shopkirana.com/</a>	604	25.36%
Greytip Software Private Limited	<a href="https://www.greythr.com/">https://www.greythr.com/</a>	350	20.25%
Metis Eduventures Private Limited (Adda_247)	<a href="https://www.adda247.com/">https://www.adda247.com/</a>	280	16.97%
Terralytics Analysis Private Limited (Teal)	<a href="https://www.tealindia.in/">https://www.tealindia.in/</a>	50	20.00%
LQ Global Services Private Limited	<a href="https://www.legitquest.com/">https://www.legitquest.com/</a>	15	16.67%
Llama Logisol Private Limited (Shipsy)	<a href="https://shipsy.in/">https://shipsy.in/</a>	50	10.00%
Sunrise Mentors Pvt Ltd (Coding Ninja)	<a href="https://www.codingninjas.com/">https://www.codingninjas.com/</a>	371	25.00%
Qyuki Digital Media Private Limited	<a href="https://qyuki.com/">https://qyuki.com/</a>	252	5.36%
Dotpe Private Limited	<a href="http://www.dotpe.in">www.dotpe.in</a>	104	7.48%
Intellihealth Solutions Private Limited	<a href="http://www.truemeds.in">www.truemeds.in</a>	37	17.80%
Fanbuff Esports India Private Limited	<a href="https://fanclash.gg">https://fanclash.gg</a>	35	20.00%
Rusk Media Private Limited	<a href="http://www.ruskmedia.com">www.ruskmedia.com</a>	35	10.00%
Bulbul Shopping Network Pte Ltd	-	480	17.82%
<b>Sub Total</b>	-	<b>11,480</b>	

We may from time to time consider various investment / asset monetization opportunities, as we had done in past, However there can be no assurance regarding whether we will be able to complete such investments / asset monetization opportunities on commercial terms acceptable to us , or at all.

No definitive documentation in connection with such investment has been executed as of date.

\* Net of disposal of secondary sale with proceeds of USD 50 mn; Shareholding post the latest round of investment and dilution

\*\* Represents effective economic interest held by Info Edge directly or through its wholly owned subsidiaries (7.59%) and indirectly through a JV subsidiary with Temasek (8.26%). The amount represents Info Edge's net investment.

Written off / provisioned investments ( fully/ partially) – Studyplaces, 99Labels, Nogle Technologies, Canvera Digital, Kinobeo Software Pvt. Ltd. (Mydala), Green Leaves Consumer Services (Bigstylist), Rare Media Co., Vcare TechNologies ( Diro Labs) and Mint Bird Tech. (Vacationlabs), Aplect Learning (Meritnation), Wishbook, Unnati , Ideaclick ( Zipserve) and Printo Document services and Pvt Limited ( Partial Provision)- Total amount written off is Rs 3,339 Mn.

# Investee companies financials

Figures in Rs Mn.

Investee Company	Website	Operating revenue			Operating EBITDA		
		FY18	FY19	FY20	FY18	FY19	FY20
<b>Partly owned subsidiary</b>							
Applect Learning Systems Pvt Ltd.	<a href="http://www.meritnation.com">www.meritnation.com</a>	308.36	347.66	245.75	(130.92)	(224.87)	(211.89)
<b>Associate Companies</b>	<b>Associate Companies</b>						
Zomato Media Pvt Ltd.	<a href="http://www.zomato.com">www.zomato.com</a>						
Etechaces Marketing and Consulting Pvt Ltd.	<a href="http://www.policybazaar.com">www.policybazaar.com</a>						
Happily Unmarried Marketing Pvt Ltd.	<a href="http://www.happilyunmarried.com">www.happilyunmarried.com</a>						
Unnati Online Pvt Ltd	<a href="http://www.unnatihelpers.com">www.unnatihelpers.com</a>						
VCARE Technologies Pvt. Ltd.	<a href="http://www.diolabs.com">www.diolabs.com</a>						
Ideaclicks Infolabs Private Ltd.	<a href="http://www.zippserv.com">www.zippserv.com</a>						
Kinobeo Software Pvt Ltd.	<a href="http://www.mydala.com">www.mydala.com</a>	8,650.63			(1,492.06)		
Green Leaves Consumer Services Pvt. Ltd.	<a href="http://www.bigstylist.com">www.bigstylist.com</a>		19,775.33			(26,174.74)	
Mint Bird Technologies Pvt. Ltd.	<a href="http://www.vacationlabs.com">www.vacationlabs.com</a>						
Rare Media Company Pvt. Ltd.	<a href="http://www.bluedolph.in">www.bluedolph.in</a>						
Wishbook Infoservices Pvt Ltd	<a href="http://www.wishbooks.io">www.wishbooks.io</a>						
NoPaperForms Solutions Private Limited	<a href="http://www.nopaperforms.com">www.nopaperforms.com</a>			38,530.19			(27,118.30)
International Educational Gateway Private Limited	<a href="http://www.univariety.com">www.univariety.com</a>						
Agstack Technologies Private Limited	<a href="http://www.gramophone.in">www.gramophone.in</a>						
Bizcrum Infotech Private Limited	<a href="http://www.shoekconnect.com">www.shoekconnect.com</a>						
Medcords Healthcare Solutions Private Limited	<a href="http://www.medcords.com">www.medcords.com</a>	N.A.					
Printo Document Services Private Limited	<a href="http://www.printo.in">www.printo.in</a>						
Shop Kirana E Trading Private Limited	<a href="http://www.shopkirana.com">www.shopkirana.com</a>						
Greytip Software Private Limited	<a href="https://www.greythr.com/">https://www.greythr.com/</a>						
Metis Eduventures Private Limited	<a href="https://www.adda247.com/">https://www.adda247.com/</a>				N.A.		
Terralytics Analysis Private Limited	<a href="https://www.tealindia.in/">https://www.tealindia.in/</a>						
Llama Logisol Private Limited	<a href="https://shipsy.in/">https://shipsy.in/</a>		N.A.			N.A.	
LQ Global Services Private Limited	<a href="https://www.legitquest.com/">https://www.legitquest.com/</a>						
Sunrise Mentors Private Limited	<a href="https://www.codingninjas.com/">https://www.codingninjas.com/</a>						
<b>Total</b>	<b>Total</b>	<b>9,374.67</b>	<b>20,298.61</b>	<b>38,775.94</b>	<b>(1,875.13)</b>	<b>(26,465.59)</b>	<b>(27,330.19)</b>

\* FY16 - FY19 numbers are based on IND AS vs. I GAAP earlier

# Zomato

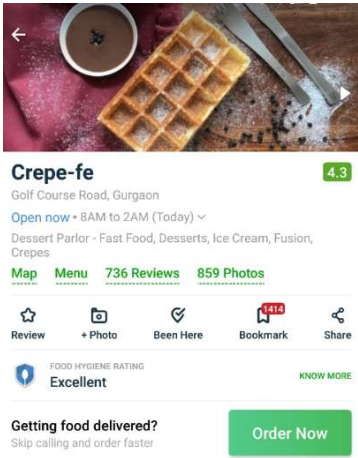




# Zomato is world's leading restaurant search, discovery and transaction platform

## Zomato has three key businesses

### 1. Listings & Reviews



- Launched in 2008
- Present in 24 countries
- 1.5m+ high quality restaurant listings with up to date scanned menus, photos and user reviews

Largest restaurant reviews & ratings platform

### 2. Food Delivery



- Launched in 2015
- Present in India
- Hybrid delivery model – combination of self fulfilled and restaurant fulfilled orders

One of the leading food delivery players

### 3. Subscription Programs



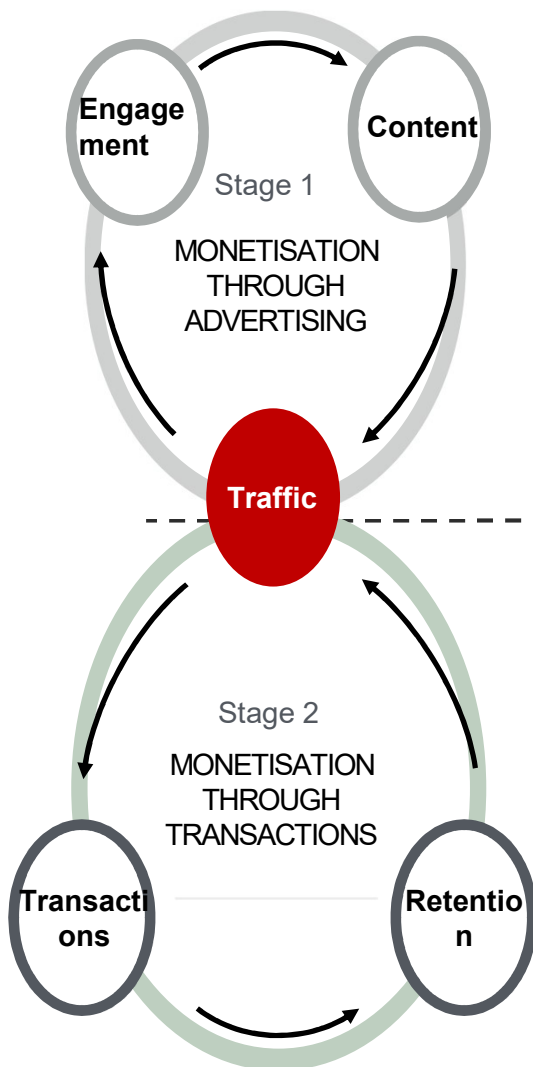
- Launched in 2017 as Zomato Gold, Re christened as Zomato Pro now.
- India and international presence
- Privileged membership programs; privileges are funded by restaurants

One of its kind, unique membership program

Other key investors in Zomato – Alipay, Sequoia, VY Capital and Temasek

# Growth is fuelled by two self feeding “flywheels”, that define Zomato’s unique business model

Multiple use cases across dining-out and food delivery result in strong network effects



## STAGE 1 – LISTINGS AND REVIEWS

- ✓ High quality, exhaustive restaurant listings (*using a combination of tech and human output*) yield large organic traffic
- ✓ Users engage with the platform to write reviews and upload photos - further enriching our content

## STAGE 2 - TRANSACTIONS

- ✓ Traffic from search/recommendations product naturally drives transactions off-take, without having to spend on marketing and discounts
- ✓ Users who transact on Zomato visit us more often than users who don't - further increasing traffic and hence adding back to the first flywheel

# Highly interactive platform ensures high user and restaurant engagement



## Bookmark

Retrieval of favorite places with a single click

## Social Feed

Latest updates from friends and foodies

## Reviews & Ratings

Description and rating of user experiences

## Photos

High quality user generated content

## Menus

Comprehensive and updated menus

## Customized Collections

Trend-based, curated group of restaurants

## Advanced Search

Multi-dimensional filters for targeted search

Users can also order food and reserve tables at restaurants with a click of a button



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## India's Best Insurance Destination

- Term Life
- Health
- Life Insurance Investment
- Car
- Two Wheeler
- Travel
- Term Life 100yrs+ (New)
- Child Plans
- Retirement Solutions
- Guaranteed Plans
- Zero Commission Investment Plans
- Home Insurance

Also See : [Group Mediciam](#) [Corporate Insurance](#) [Cancer](#) Group Companies : [Free CIBIL Score \(Paisabazaar\)](#) [Etechaces](#)

# PolicyBazaar

- PolicyBazaar is India's online price comparison site for insurance
  - Significant value add to individuals and Financial Institutions for policy related decision-making
- A leader in its category
  - Captures an estimated 90% share of insurance comparison & 50% of online Insurance transactions
- Huge potential in the market
  - Currently less than 4% of the Indian population is insured
- Other key investors in Policybazaar include – Softbank, Temasek, Tencent, Tiger Global

# Happily Unmarried



# Ustraa

- Ustraa raised 50 crores from IIFL in July.
- Sales slowly coming back to pre Covid levels. Currently at 60% aim to be 100% of pre Covid levels by Oct
- Company seeks to strengthen its essential item portfolio and are launching more products like Disinfectant sprays, Hand washes.
- Launch of hair care products too is being planned for Sep.
- A print and Media campaign targeting Punjab and J&K as a pilot is being tried to boost offline sales. This activity will run for 6 weeks.

# Data Security at IEIL

## ➤ Data Security and Privacy Policy

- Protects users data using end point security through Data Leakage prevention software (Websense DLP), Write restrictions by locking USB's, disk encryption complex password policies , vulnerability patching and anti-viruses.
- Denial of Service attack protection using Kona site defender from Akamai and Qradar.
- 24X7 monitoring using Security Operations Center
- Quarterly Information technology audits by external agencies
- Annual Penetration testing

## ➤ Data security Certifications.

- Certified ISO27001 ( For Naukri and Jeevansaathi) , compliant to annual audits.
- PCIDSS ( Payment Card Industry Data Security Standard) ( For Naukri and Jeevansathi) compliant

# People Development

- Assessment
  - Defined Performance Management process which includes KRA Settings , Quarterly goal setting , mid year and full year assessments
  - Established practices to capture employee concerns through annual surveys.
  
- Learning and Development
  - Advanced education policy that allows Nano Degree, distance learning, E learning courses from recognized schools to eligible employees.
  - 6 Months+ Online certificates and diplomas available from universities like Columbia, MIT etc.
  - Short term courses designed for specific leadership needs by IIMs/ ISBs
  
- Talent Pipeline
  - Campus Hire Program and Internship Programs for new hires from all premium institutes.
  - Partnered with External L&D partner for need based management skill and capability development programs.
  
- ESOPs
  - Grants are awarded basis role, work and performance through RSU ( Restricted Stock Units) or Stock Appreciated Units.
  - All Senior Management Executives and key roles in Engineering and Product teams are granted SOPs .



# Contribution to Environment.

## IEIL's Corporate Office

- Green Building
- Silver Certification
- By Indian Green Building Council (IGBC)



## Improved Indoor Air Quality at Noida / NCR Offices –

- Outside PM 2.5 - 881, Inside PM 2.5 – 20.
- 73% Employees have advantage of cleanest air being at IEIL (3394 out of 4653 Employees)



## Conserving Precious Natural Resource – Water

- 105 Nos. of Aerators in use
- **7,00,000 liters conserved / year**



## Energy Conservation / Optimization

- 3200 Nos. LEDs and 22 Nos. VFDs in use
- **Optimized - 2,00,000 Units / Year**



## Commitment for a Green Future

- **Electric Vehicle** - starting to use one electric vehicle for various within city travel needs
- **Electric Vehicle Charging Station** - One in place at IEIL's Noida office & another one to go live soon... to spread awareness and to encourage employees for use of EV's



## Commitment for a Green Future

- **Solar Power** (50 KW Onsite) - under implementation stage - in 45 days
- **Plantation Drive** – to give back to nature, spread awareness & encourage employees for greener environment & future



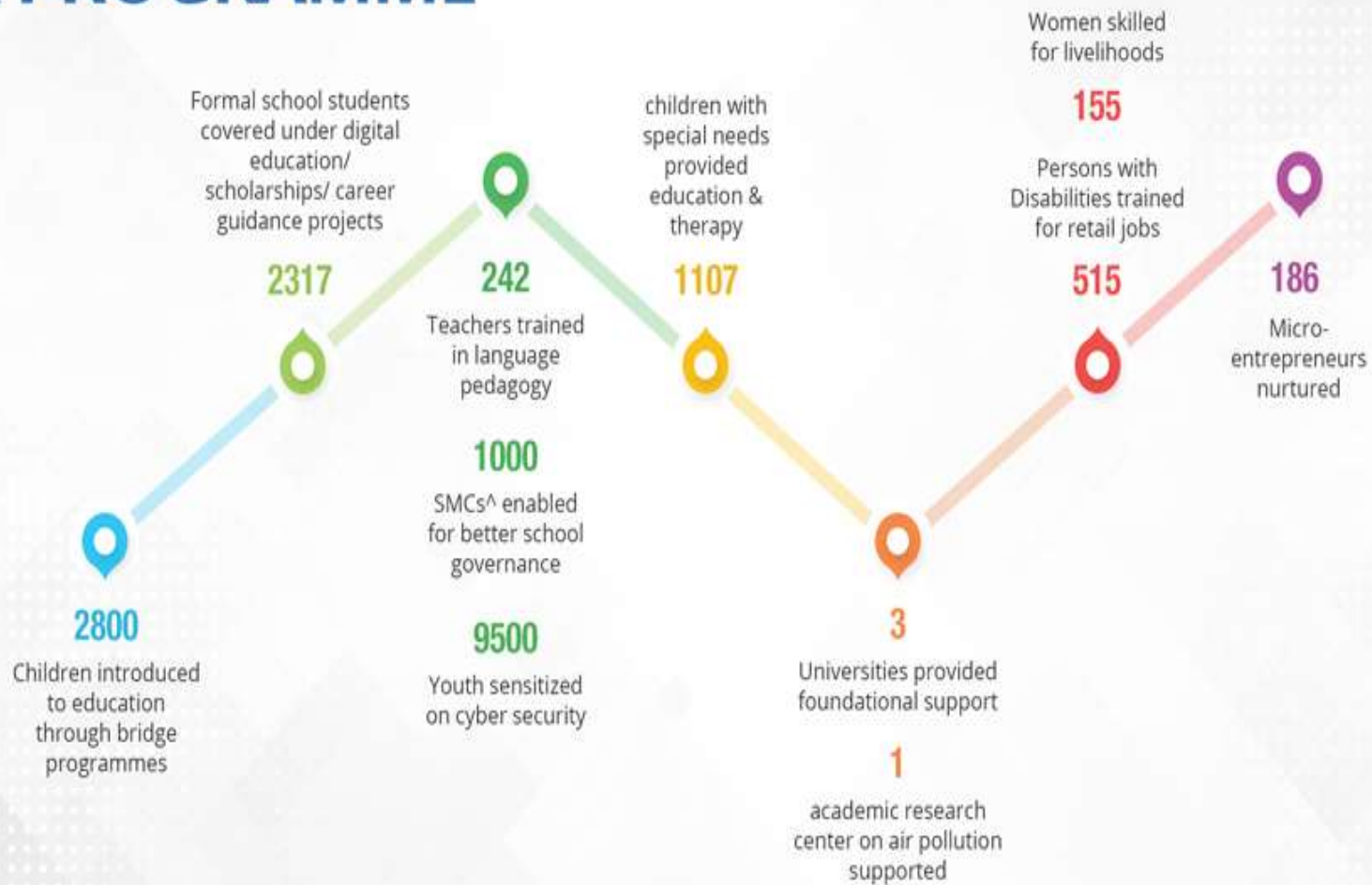
# CORPORATE SOCIAL RESPONSIBILITY

Our CSR programme focuses on supporting organizations making impactful interventions at various stages across the education and employability spectrum





# DIRECT IMPACT OF OUR KEY CSR PROGRAMME\*



Beneficiaries of grants made from FY 2014-15 to FY 2019-20 as on March 31, 2020 | ^SMCs- School Management Committees of Delhi government schools

# Team

# Management Team NHSB2

Name	Age	Qualification	Designation/Role	Previously worked with	Year of joining
Sanjeev Bikhchandani	56	B.A Arts&Humanities M.B.A Marketing IIM Ahmedabad	Founder And Executive Vice Chairman	Lintas, Glaxo Smith Kline	1995
Hitesh Oberoi	47	B.Tech IIT, M.B.A IIM Bangalore	Managing Director And CEO	Hindustan Lever Limited	2000
Harpuneet Singh Rekhi	40	B.Com, M.Sc Information Technology	Senior Vice President Engineering	Aspen Communications	2006
Sharmeen Khalid	48	B.Sc Biology M.B.A Marketing	Chief Human Resources Officer	Freelance Consultant	2006
Shalabh Nigam	48	B.Tech Electronics and Communication	Executive Vice President- New Projects	Baypackets Technologies	2007
Sumeet Singh	46	B.B.M, M.B.A	Chief Marketing Officer	Indian Venture Capital Association	2007
Anand Prakash Bansal	46	B.Com	Sr. Vice President Administration And Facilities	ICICI Prudential	2008
Rinchan Gupta	41	B.Tech Computer Science	Executive Vice President-User Experience & Design	HP	2008
Maneesh Upadhyaya	42	B.Sc St Stephens College, New Delhi	Chief Business Officer- 99Acres.Com	Bain & Company India Pvt Limited	2010
Vivek Jain	46	B.Tech IIT, New Delhi M.B.A (IIM), Bengaluru	Chief Business Officer- Shiksha & FF	Sel-Employed Riverbridge	2010
Rohan Mathur	36	B.Tech Information and Communication Technology (DA-IICT)	EVP & Business Head Jeevansathi.com	Cadence Design Systems	2011
Murlee Manohar Jain	42	B.Com, ICSI The Institute of Company Secretaries, Mumbai ICSI PGDBM	Senior Vice President - Secretarial & CS	APOLLO TYRES LTD	2013
Chintan Arvind Thakkar	53	CA	Director & CFO	Computer Associates	2014

About 10% of the total employees are covered under ESOP



# Management Team

Name	Age	Qualification	Designation/Role	Previously worked with	Year of joining
Abhinav Katiyar	38	B.Tech	Senior Vice President Engineering	Healcon.com	2014
Pankaj Jain	45	B.Tech IIT Delhi MS Stanford University	Executive Vice President - Key Projects	Spice Online Retail	2014
Shailesh Chandra	46	B.E Electrical Delhi College of Engineering	Executive Vice President	Amazon	2014
Tirthankar Dutta	39	B.Tech IT West Bengal University of Technology	Senior Vice President Information Security	Expedia	2016
Nitin Bansal	43	B.Tech Computer Science IIT Delhi	Executive Vice President	One 97 Communication (PAYTM)	2017
Rajesh Kumar Aggarwal	47	CA (ICAI), CS (ICSI), B.Com (Hons) from SRCC	Executive Vice President - Finance	CITICORP FINANCE INDIA LTD	2017
Rishi Gupta	39	B.E Punjab University	Senior Vice President & Head Technology-Jeevansathi	AUGUST JEWELLERY PVT LTD	2018
Shantanu Mathur	41	B.Tech IIT M.B.A Dartmouth University	Executive Vice President – New Business	Knowlarity Communications India Pvt Ltd	2018
Vivek Aggarwal	42	B.Com(Honours) Delhi University, CA ICAI	Executive Vice President - Finance	NA	2018
Alok Vij	43	B.Com, Chaudhary Charan Singh University	Executive Vice President & Head-IT	KRONOS SOLUTIONS INDIA PRIVATE LIMITED	2019
Pawan Goyal	49	B.Tech IIT M.Sc THE UNIVERSITY OF TEXAS AT AUSTIN	Chief Business Officer - Naukri.com	adobe systems	2019
Raghavendra Kulkarni	36	B.E Arts Pune University M.B.A Purdue University	Executive Vice President	Amazon	2019
Vibhore Sharma	45		Head Tech Investments	PIONEER O LTD	2020

About 10% of the total employees are covered under ESOP

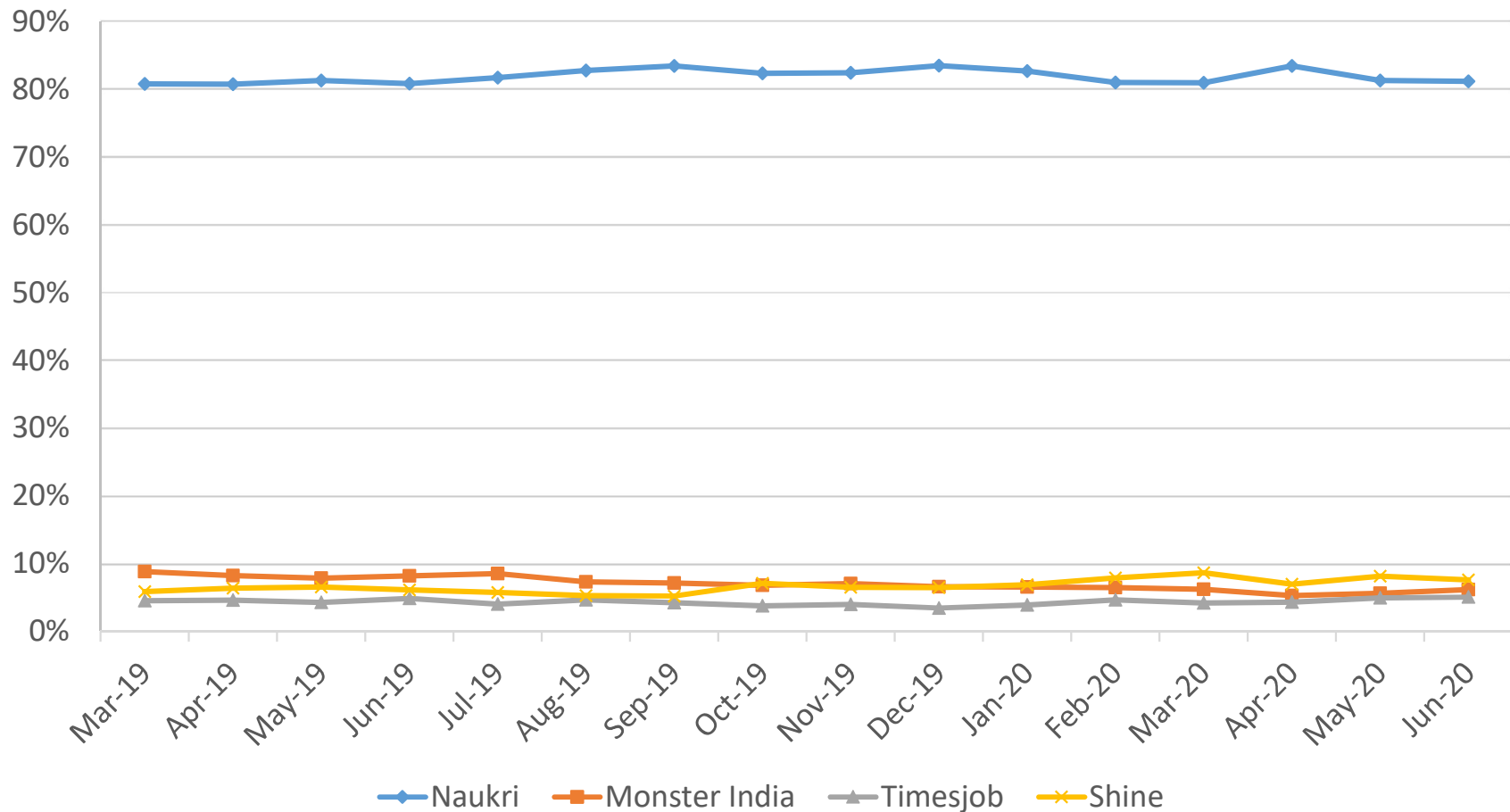
# Investor relations contacts

Name	Chintan Thakkar	Vivek Aggarwal
Designation	CFO	EVP – Finance
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Telephone	+91 120 3082137	+91 120 3082007
Fax	+91 120 3082095	
Address	Info Edge (India) Limited, B 8, Sector 132, Noida – 201 301, Uttar Pradesh, India	
Website	<a href="http://www.infoedge.in">www.infoedge.in</a>	

# Annexures

# Naukri has dominant traffic share

Traffic from desktops based on time spent – excluding indeed



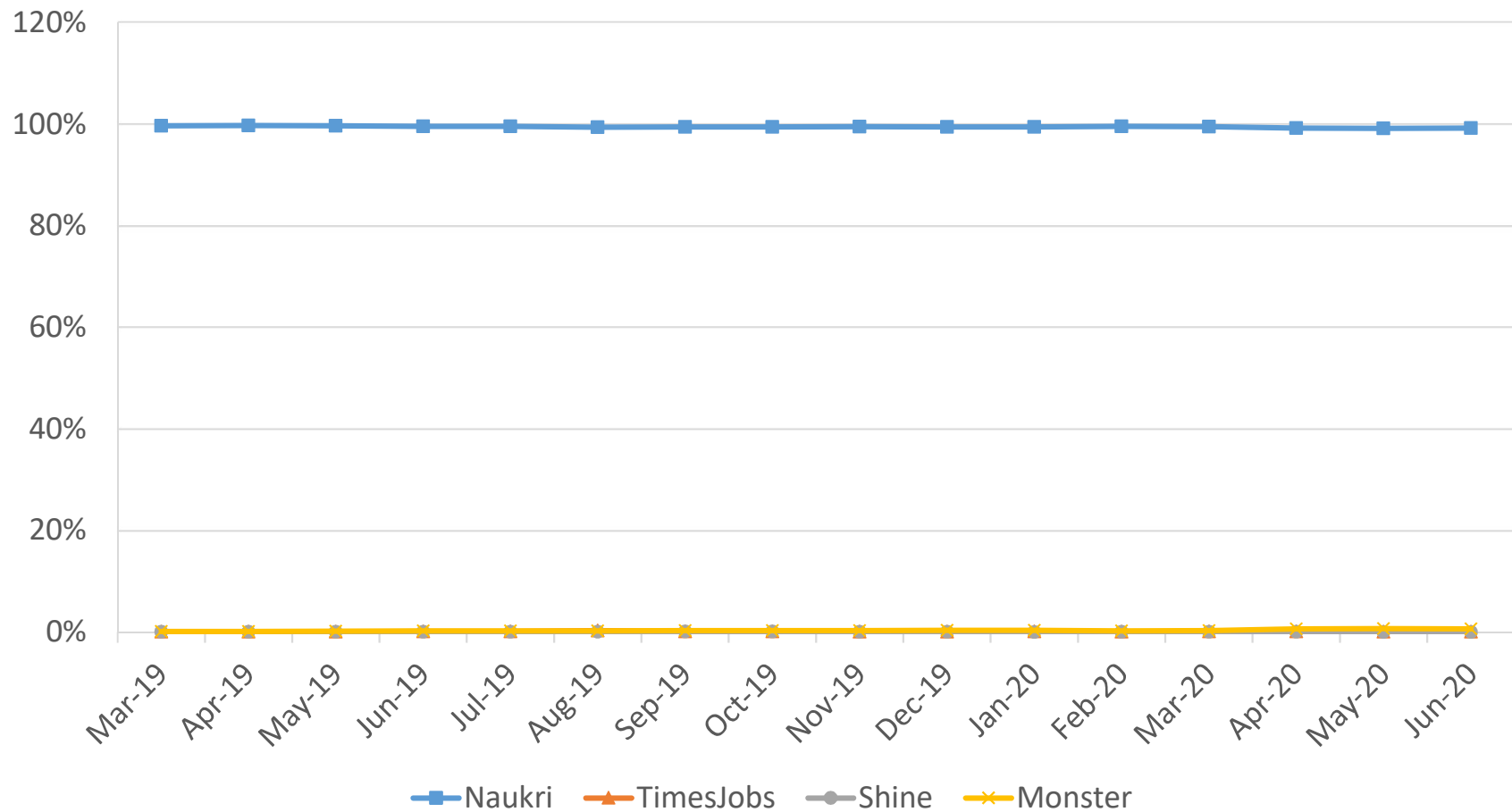
Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to job  
 Similarweb revised the algorithm for calculating time share through app in Q3'20



# Naukri has dominant traffic share

Android App traffic share based on time spent – excluding indeed



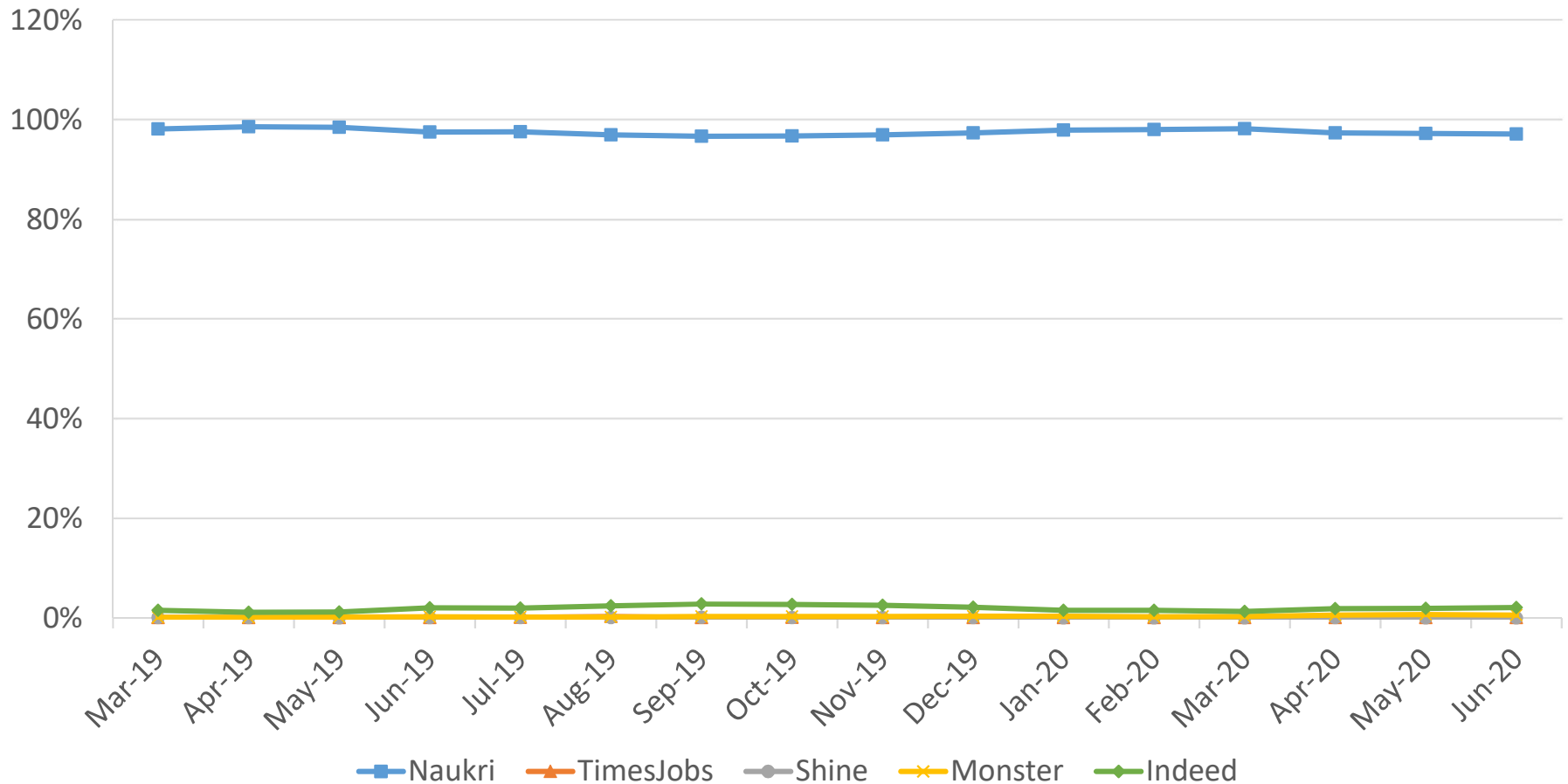
## Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs

- ~70% of Naukri's traffic comes through Android / iOS apps and mobile site
- Similarweb revised the algorithm for calculating time share through app in Q3'20

# Naukri's traffic share

Naukri's Desktop traffic based on time spent – including Indeed



Source: SimilarWeb

Above chart excludes LinkedIn since much of the traffic may not pertain to jobs

Similarweb revised the algorithm for calculating time share through app in Q3'20

