

**XIUS**<sup>®</sup>  
INNOVATE. LEAD.



COMPANY PERFORMANCE  
ANALYSIS & OVERVIEW  
FY 2011 RESULTS

28 February 2012

# Contents

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- Company –Business & products
- 2011-Q4 Summary
- Financials – Q4 & full year of FY 2011
- Focus areas for 2012
- New Growth drivers & Market Opportunities
- Corporate matters & Risks

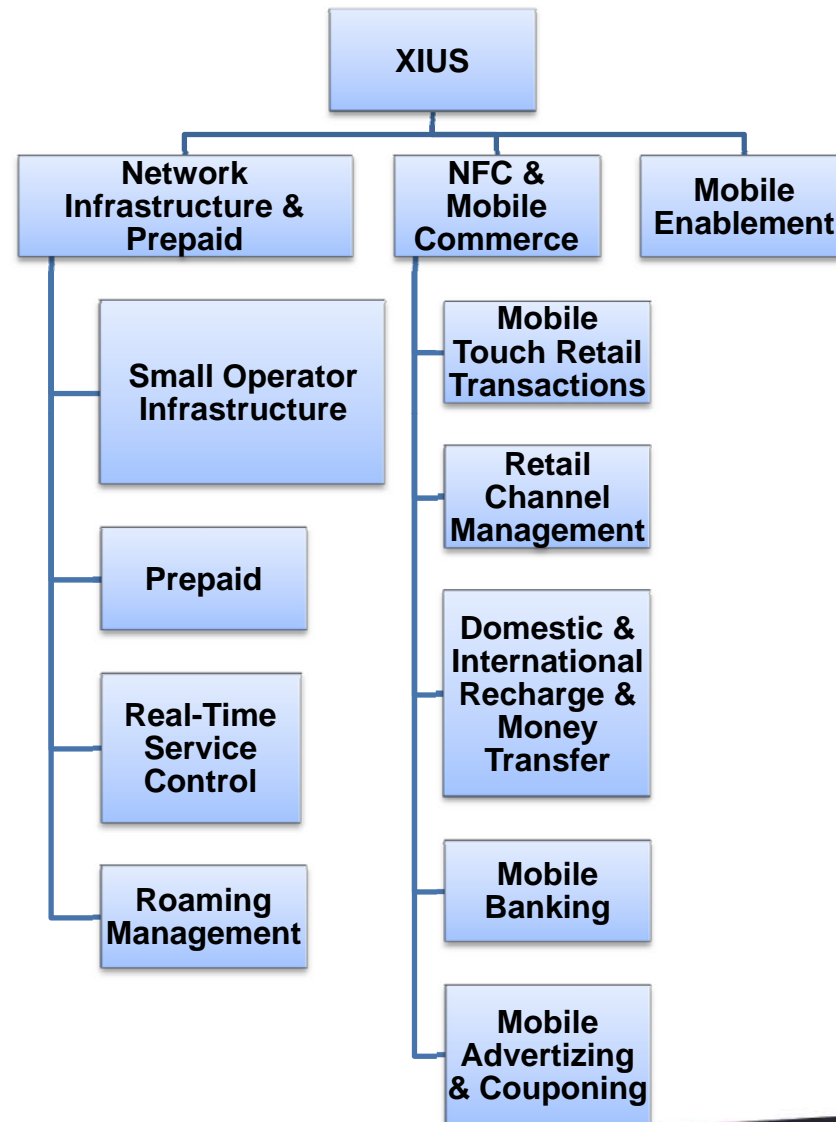
## What does XIUS do

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**XIUS, the telecom arm of Megasoft, is a mobile technology specialist focused on real-time transaction processing in three domain areas. We offer network infrastructure & prepaid, mobile commerce, and mobile advertising.**

**XIUS believes in innovation, agility, and execution excellence, with customer-centricity as its core value. XIUS offers its solutions in a managed services model thereby enabling customers to launch and monetize services quickly.**

# Domains / Solutions Matrix



## 2011- Annual Performance Summary

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- 2011 Rs. 150 Cr Revenues with over Rs 17 Cr PAT
  - 10% decline in Y-o-Y revenues (2010 – Rs 167 Cr), mainly due to loss of a large contract in US & US pre-paid revenue decline
  - 19% decline in PAT
- Debtors outstanding around 124 days
- Strongest ever Pipeline build up - esp. MSP, APD, M-commerce (over 50 Mn\$)
- Two new product launches (Mobile App Centre & Mobile Advt/ Couponing) – receiving good enquiries.
- APD – pilots a big success (though delayed) commercial discussions with many customers under way– All are large size deals.

## Q4-2011 Financial Summary

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	<b>2011 Q4</b>	<b>2011 Q3</b>	<b>% Change</b>
	Rs lakhs	Rs lakhs	%
Revenues	3574	3444	3.8
EBIDTA	811	769	5.5
Cash profit	635	601	5.7
PAT	276	303	(8.9)

## 2011 – Financial Summary

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<b>12 months</b>	<b>2011</b>	<b>2010</b>	<b>% Change</b>
	Rs lakhs	Rs lakhs	%
Revenues	15037	16791	(10.4)
EBIDTA	4058	5346	(24.1)
Cash profit	3042	3606	(15.6)
PAT	1752	2172	(19.3)
EPS (Rs)	3.87	4.90	(21.0)

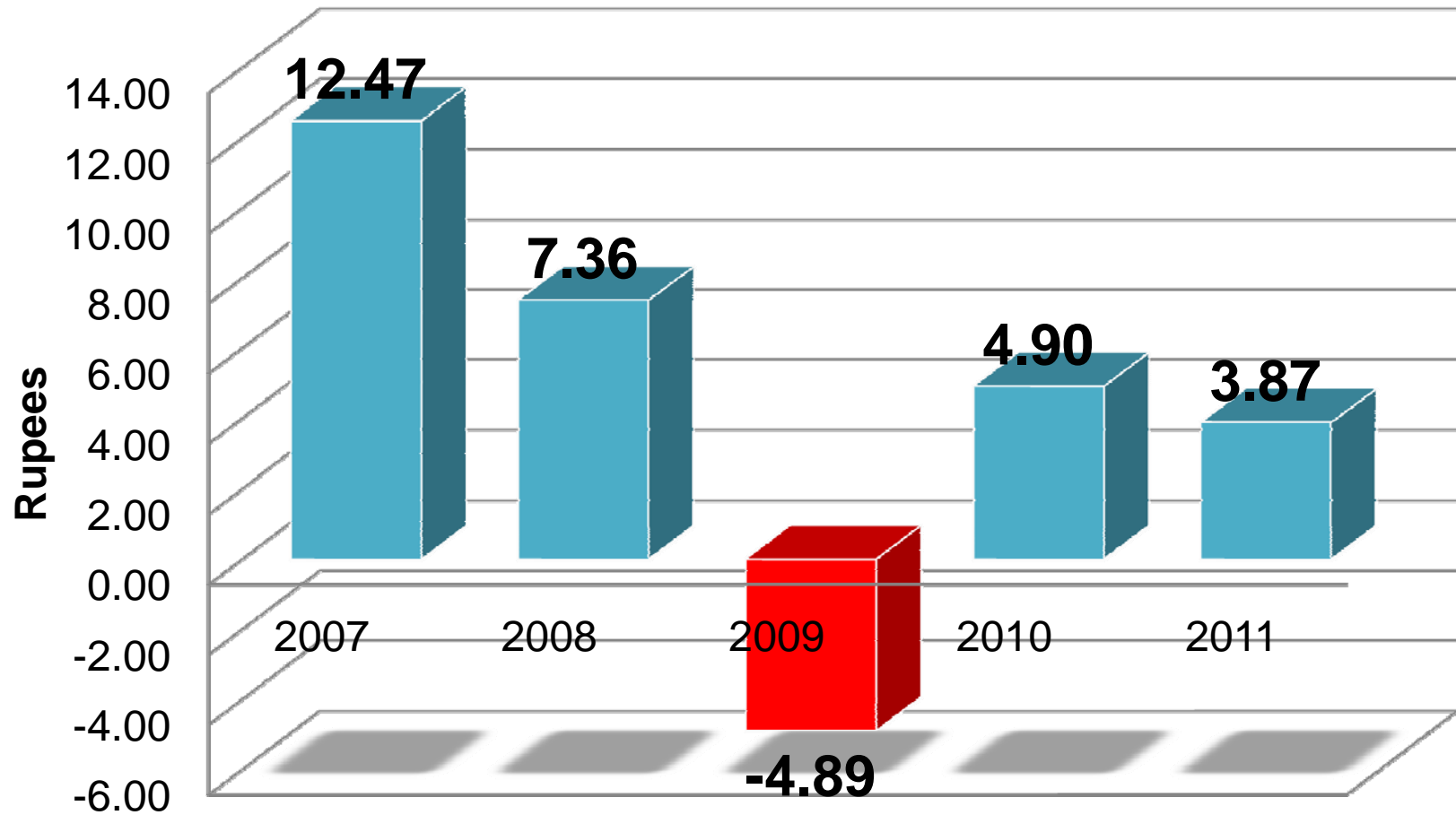


## Balance Sheet

Particulars	As at	As at
	31 Dec 2011	31 Dec 2010
	Rs lakhs	Rs lakhs
<b>Liabilities</b>		
Capital & Reserves	11,294	10,606
Borrowings	9,978	8,722
	<b>21,272</b>	<b>19,328</b>
<b>Assets</b>		
Fixed Assets (net)	11,426	9,953
Investments	1,212	1,212
Net Current Assets	8,634	8,163
	<b>21,272</b>	<b>19,328</b>
Net Worth	11,294	10,606
Book value (Rs)	25.51	23.96
Debt / Equity	0.88	0.82
Current Ratio	5.06	4.29



# EPS (Rs)



## 2012 – Focus Areas

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- MTT-APD – Commercial roll out with two customers and conversion of balance pipeline
- Latam Mobile commerce & M-Banking (Govt directive in many countries) – closure of contracts
- Commercial roll out of Mobile App Excellence centre
- Small carrier infrastructure & Wholesale revival -- good sign for XIUS

## 2012-14: Key growth drivers for the company

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- Mobile Payments and Retail Mobile applications
- New MTT –APD Platform
- Whole (small carrier, MVNO) Infrastructure
- Mobile App Center services
- Non-Carrier (over-the-top) Mobile services & Mobile enablement

**3G networks will act as a great catalyst for both the above**

- Focus on growing in LatAm, India & Asian Mobile markets esp. with Larger multi-country carriers through multi-year contracts

## Corporate Update

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- ◉ Vizag Land Sale – strong pick up in interest and enquiries – expecting to close soon
- ◉ Some progress (but slow) in Land Allotment by APIIC
- ◉ SEZ center for MTT-APD business to be operational by mid 2012

## Business Risks

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- ◉ Growth is dependent on new products & pending closure of a few large deals in the pipeline
- ◉ AP Property Market / Telangana issue
- ◉ MTT APD involves Hardware – a new area for the company
- ◉ Global Telecom Spend (Esp. in US) un-clear and slow
- ◉ US pre-paid market revenues declining for the company quarter on quarter.
- ◉ Rupee – US\$ rate fluctuations