

# "CYBERTECH SYSTEM & SOFTWARE

LTD //



SWIPE TO READ FULL REPORT

# Basics

## About

AVINASH has compiled this list solely for educational purposes. Along with applications and proofs, I had supplied all news paper cut-outs and an official company notification. I gave it my all, and I am still and will always be a learner. If you have any valuable information regarding this company that you would like to share with me, please do so.



CyberTech is a CMMI Level 3 company focused on SAP digitalised solutions and next-generation spatial analytics . The Company delivers the benefits of SAP S/4HANA with digital business processes that improve customer experience, provide real-time and predictive insight and increase productivity. The Company's spatial analytics deliver substantial digitisation benefits by integrating maps with enterprise data. CyberTech is a trusted partner for several global enterprises, helping them with Cloud transformation. The Company has strategic relationships with SAP, Microsoft, Esri and Cisco. Spatiality's™, a product subsidiary of CyberTech, designs products with the focus on embedding industry specific location intelligence into enterprise data to deliver unique insights. Spatiality's is transforming the way organisations take decisions to achieve operational excellence and profitable growth.

# Basics



About

- 52 week high - **245.70 (17/01/2022)**
- 52 week low - **116.00 (19-04-2021)**
- TTM EPS - **7.24**
- TTM PE - **25.03** ( already less than sector pe  
.....companies with same sector are having avg  
pe - **41.94 (sector pe)**)
- Book Value Per Share - **40.95**
- Mkt Cap (Rs. Cr.) - **510** ( can't be operated  
easily as penny shares)
- Face Value - **10Rs**
- VWAP - **179.25**

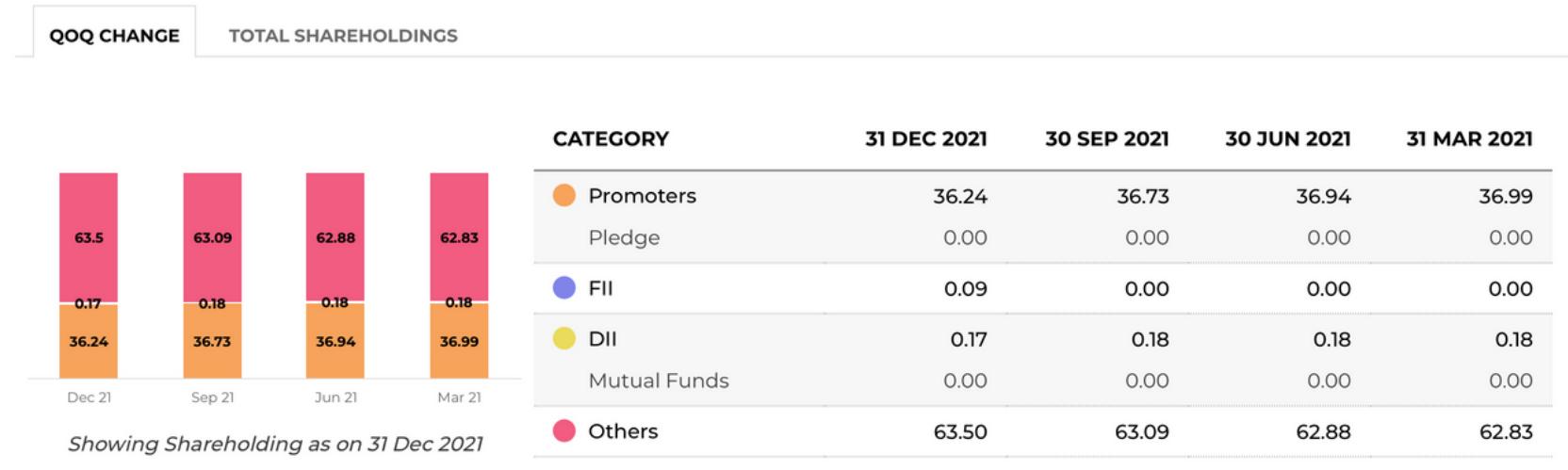


# Basics

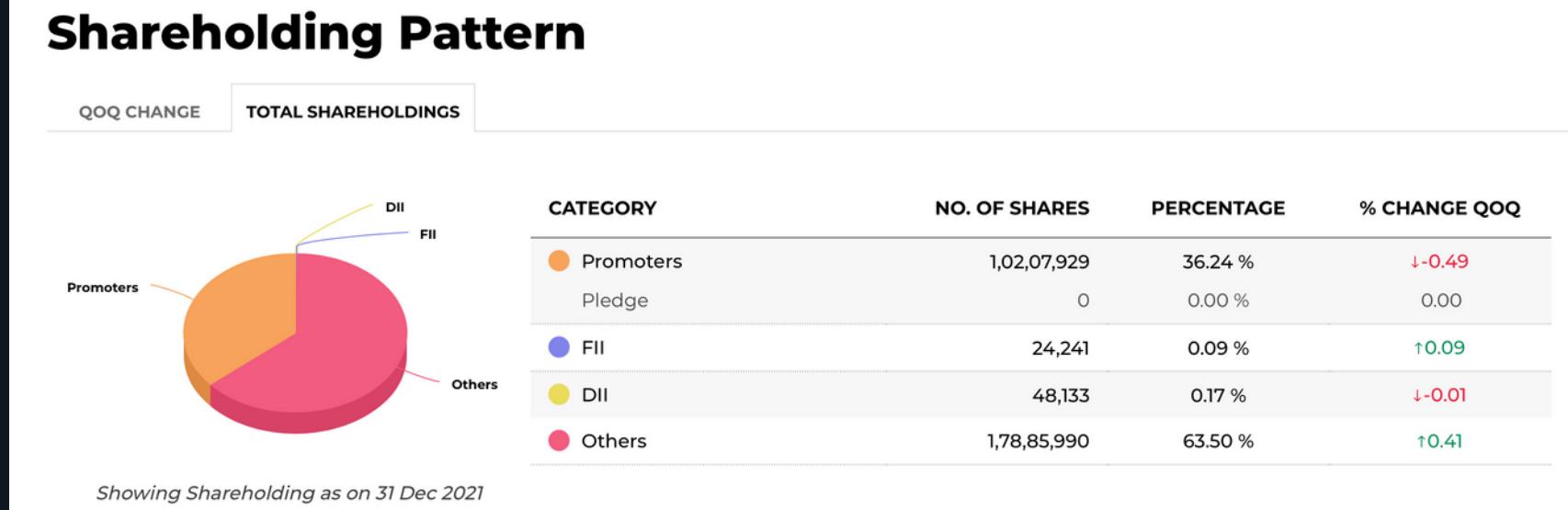


About

## Shareholding Pattern



## Shareholding Pattern



FII'S INCREASED HOLDING IN LAST QUARTER

# Results



**Net Sales at Rs 35.57 crore in December 2021 up 17.56% from Rs. 30.25 crore in December 2020.**

**Quarterly Net Profit at Rs. 5.18 crore in December 2021 down 58.07% from Rs. 12.36 crore in December 2020.**

**EBITDA stands at Rs. 9.08 crore in December 2021 up 9.93% from Rs. 8.26 crore in December 2020.**

-> increasing >



# Health



## Liabilities

*Lets discuss about the financial health of the company!*

**Short Term Liabilities:** short term assets (**₹1.1B**) exceed its short term liabilities (**₹303.3M**).

**Long Term Liabilities:** short term assets (**₹1.1B**) exceed its long term liabilities (**₹40.0M**).



**PERFECT MANAGEMENT OF LIABILITIES WITH ASSETS**

# Health



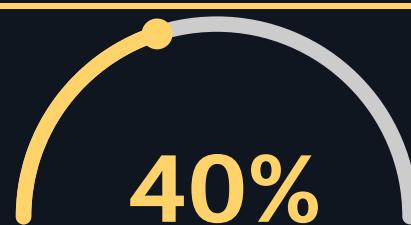
## Debt & equity

- **Debt Level:** has more cash than its total debt.
- **Reducing Debt:** debt to equity ratio has reduced from 11.8% to 4.6% over the past 5 years.
- **Debt Coverage:** debt is well covered by operating cash flow (401%).
- **Interest Coverage:** earns more interest than it pays, so coverage of interest payments is not a concern.

All data from CyberTech Systems and Software Company Filings, last reported 31/12/2021

Date	Total Equity	Total Debt	Cash & Short Term Investments
31/12/2021	1,271.36	58.44	868.87
30/09/2021	1,271.36	44.89	868.87
30/06/2021	1,148.04	70.59	625.78
31/03/2021	1,148.04	55	586.84
31/12/2020	997.44	112.59	693.74
30/09/2020	997.44	96.03	693.74
30/06/2020	941.16	46.36	403.43

31/03/2020	941.16	27.69	360.36
31/12/2019	876.76	116.26	404.3
30/09/2019	876.76	116.26	404.3
30/06/2019	831.5	178.37	361.94
31/03/2019	831.5	178.37	297.75
31/12/2018	754.37	175.54	352.79
30/09/2018	754.37	175.54	352.79
30/06/2018	755.32	109.26	221.34
31/03/2018	755.32	109.25	153.55
31/12/2017	755.57	105.85	166.65



# Health



Debt & equity

Dec 31 2021

Debt ₹ 58.436m

Equity ₹ 1.271b

4.6% Debt/Equity Ratio



50%

# Health

## Balance Sheet

### Assets

Cash & Short term Investments  
₹868.9m

Physical Assets  
₹293.1m

Long term & Other Assets  
₹231.5m

Receivables  
₹220.9m

### Liabilities + Equity

Equity  
₹1.3b

Accounts Payable  
₹145.3m

Other Liabilities  
₹139.5m

Debt  
₹58.4m

**Cybertech have 14.0yrs Average management tenure which is great**

**There are many insider deals going on recently .....**

**Financially company is almost perfect 10/10 the only issue with them previously are there future .....but certain plans are being developed now....**

# Health

Financial trend



Perfect financial trend.....slow but incredibly gradual progress, and consistency is all that matters in terms of compounding.

- Current price is less than intrinsic value
- maintained dividend levels over the last 5 years consistently and not in ASM list toooo !!!
- great zone to enter, anywhere b/w 175 - 190 as it will be in overbought zone under this bracket

60%

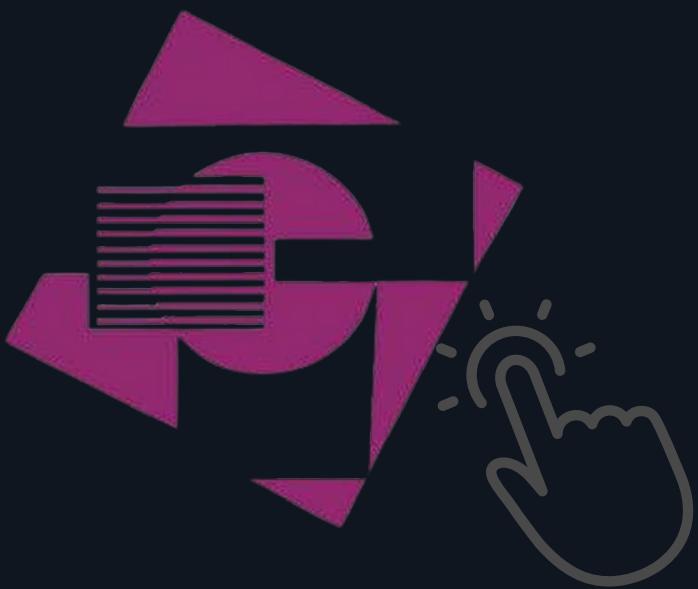
# Health

# Earning

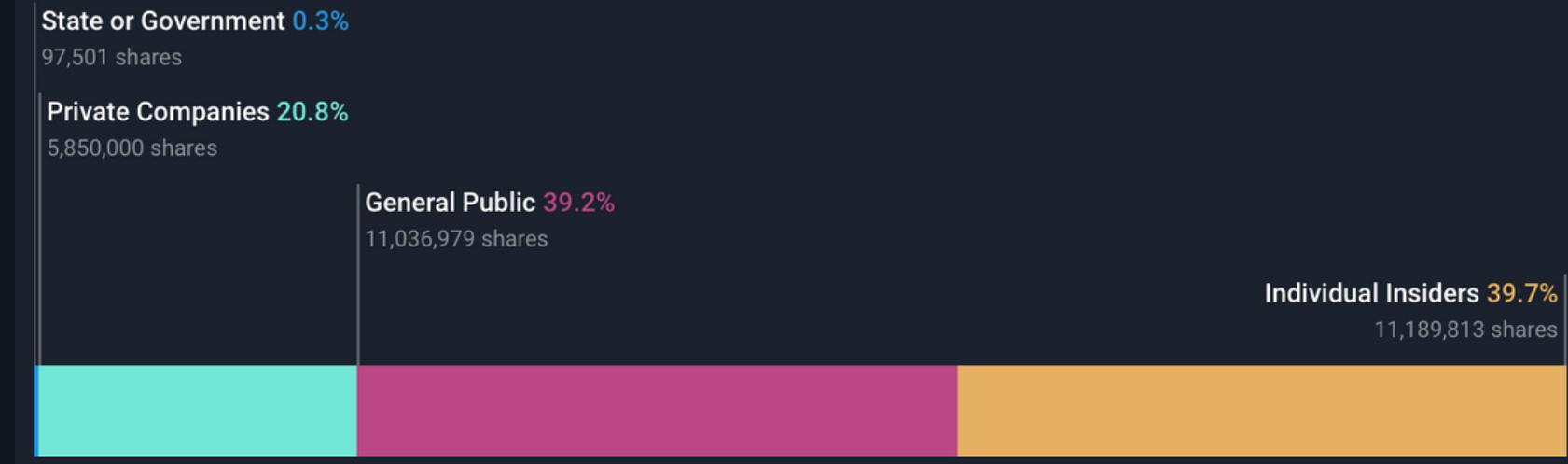
- Over the last 5 years, revenue has grown at a yearly rate of 10.09%, vs industry avg of 8.76%
- Over the last 5 years, net income has grown at a yearly rate of 59.69%, vs industry avg of 7.28%

You will receive a full copy of the Q3FY2022 earnings presentation by clicking on the company logo below.

Although a summary of that is already included in this paper, if you want to dig deeper, you can.....



# Ownership



Cyber tech is outperforming on ground work recently:-

- Cybertech is now a Microsoft gold partner
- Cybertech is SAP sell partner
- leading in managing cloud data using GIS landscape

Many big companies are already there clients  
ie. Reliance Ind ltd. , Harman , SAP ,esri , cabot ,  
Aecom and many more



# What I think



Observation

**Cybertech Sys share price was Rs 181.20 as on 01 Apr, 2022, 03:55 PM IST. Cybertech Sys share price was up by 6.28% based on previous share price of Rs 171.4. Cybertech Sys share price trend:**

- Last 1 Month: Cybertech Sys share price moved up by 10.56%
- Last 3 Months: Cybertech Sys share price moved down by 18.08%
- Last 12 Months: Cybertech Sys share price moved up 45.19%
- Last 3 Years: Cybertech Sys Share price moved up by 321.40%

Basically company is growing decently from base since 2017...and its being underperforming since listing to 2012 and survived through two major market crashes tooo.....

# What I think



Analysis

Lets summarize all the stuff here.....actually where will it go ?

So basic methods for Analysis are

1. Fundamental Analysis (clearly seen above that good Fundamentally is really)
2. Technical analysis ( will attach chart at last with important levels) Hint: already had a crossover of SMAs , resulting in a short upswing.
3. Psychological aspect : People tend to confuse when i say about psychology , psychology never works in a algorithmic way ....at least in equities As a result, we notice historical patterns in psychological situations from an economic standpoint, which provides a better view for planning entries and targets.



# What I think



## Analysis

We shouldn't rely on the third point entirely because it can lead to less accurate findings; instead, we should think of it as confirmation; it will work perfectly.

Let me elaborate 3rd aspect

- There's only one point ....it's seasonality !!!

Yes, that's seasonality (here only); however, before we conclude, let's backtest it.

Condition : The day is 25th March !

Graph of backtest is attached below.....you can conclude that after every 25th march share upmoves 10-11% within 1 Month, and you can backtest it since 2000 and you

There have been 24 distinct episodes comprising a total of 24 trading days. 88% of those days resulted in an upward move over a 1M horizon.

# What I think

↔∞↔

## Analysis



CONDITION OCCURS AT REGULAR INTERVALS ✓

HIGH HISTORICAL HIT RATE ✓

ATTRACTIVE RISK-REWARD ✓

CONDITION OCCURRED AT LEAST 10 TIMES IN THE PAST ✓

CONDITION TRIGGERED ACROSS DIFFERENT BUSINESS CYCLES ✗

SMALL PNL DRAWDOWNS ✓

90%

# My position



Click on chart to zoom\*



PRICE HAD ALREADY CROSSED ABOVE SMA 30& 50 AND IS TRADING ABOVE IT'S 200 DAY SMA OF 174.0

# News



1. CyberTech Systems and Software invests additional \$500,000 in Spatialitics
2. Cybertech Systems and Software climbs 3% after Ind-Ra upgrades its credit ratings

News are been posted daily on the telegram channel "Cybertechinvestors"



*Thanks for reading complete  
report*

