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Portfolio Manager - INP000003468 Stock Broker - INZ000193533 AMFI ARN - 124058

NSE, BSE, MCX - INZ000193533 CIN - U67190WB1999PTC090087

Investment Advisory Reg No - INA300002022

HCL TECHNOLOGIES

These valuations are done by our VS Research team, however there are many other methods of valuing the company. Please use your own discernment while using the valuation by VS research. These valuations are very subjective.

HCL TECHNOLOGIES

Compare Stocks

910.35 + 4.25 (+ 0.47%)

As on 14.05.21

Our Recommendation: Buy (Quality Business Score : 21/22) (Alpha Generator Score(20 Qtr) : 11/20) (Alpha Generator Score(3 Qtr) : 1/3)

This stock is recommended Buy , it is Undervalued (Buy at Previous Day Low 897 or Previous Week Low - 891 or Previous Month Low - 895). Total Quality business Score of this company is 21 out of 22 Score. Mar-21 Quarter Result has 1 score as has shown positive Sales growth & negative EPS growth. In 2020-21 has 4 score as has positive Sales growth & ROE Above 15 & positive 2Yr Avg Free Cash Flow, In 2019-20 has 4 score as has positive Sales growth & positive EPS growth & ROE above 15 & positive 2Yr Avg Free Cash Flow, In 2018-19 has 4 score as has positive Sales growth & positive EPS growth & ROE above 15 & positive 2Yr Avg Free Cash Flow, In 2017-18 has 4 score as has positive Sales growth & positive EPS growth & ROE above 15 & positive 2Yr Avg Free Cash Flow, In 2016-17 has 4 score as has positive Sales growth & positive EPS growth & ROE above 15 & positive 2Yr Avg Free Cash Flow, In 2016-17 has 4 score as has positive Sales growth & positive EPS growth & ROE above 15 & positive 2Yr Avg Free Cash Flow,

Sector: IT MarketCap: Large Cap (247024.93) Result Type: CQCY

V aluation Parameters

Intrinsic Value Per Share	(i)	443
Overvalued Above Price	(i)	1772
Fairly Valued Between Price	(i)	1329-1772
Undervalued Below Price	(j)	1329
Recommended Valuation	(j)	Undervalued
Valuation as Per DCF	(i)	649
Valuation as Per Graham	\bigcirc	452
Valuation as Per Earnings	(i)	616
Valuation as Per Book Value	\bigcirc	221
Valuation as per Sales	\bigcirc	278
TTM EPS	\bigcirc	41.07
TTM Sales	\bigcirc	75379.00
PE Ratio(TTM)	\bigcirc	22.16
Sector PE	\bigcirc	26.72
Peg Ratio	(i)	1.87
Latest PB Ratio	\bigcirc	4.12
Latest Price/Sales	\bigcirc	3.28
Face Value	(i)	2.00
Latest No. of Equity Shares(in Crs)	(i)	271.37
Latest Shareholder's Fund(in Crs)		59913
Enterprise Value(in Crs)	(i)	247141

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ction or Momentum Parameters

Alpha Generator Score(AGS)	(i)	11
No. of Quarters Data Available	\bigcirc	20
20 Quarters Hit Ratio	\bigcirc	55.00%
Last 3 Quarters Hit Ratio	(j)	33.33%
Last 3 Quarters AGS		1
Current Financial Year		-9.20 %
Current Quarter		-9.20 %
Last 1W Performance	(j)	-0.66 %
Last 1M Performance	(j)	-8.22 %
Last 3M Performance	(i)	-4.64 %
Last 6M Performance	(i)	9.61 %
Last 9M Performance	<u>(i)</u>	28.38 %
Last 1Yrs Performance	<u>(i)</u>	78.06 %
Last 2Yrs Performance	<u>(i)</u>	70.57 %
Last 3Yrs Performance	(i)	96.83 %
Last 4Yrs Performance	(i)	114.57 %
Last 5Yrs Performance	(i)	151.77 %
52 Week High	(i)	1067.00
52 Week Low	<u>(i)</u>	505.25

Support & Resistance Levels

ong Term Quality Parameters

		2020	2021	% Growth
ROE	i	23.87	20.09	-15.84
ROCE	i	28.42	27.77	-2.29
		Mar-20	Mar-21	% Growth
Total Share Holders Fund Value (in Crs)	(i)	51267	59913	16.86%
		Mar-20	Mar-21	% Growth
Total No of Shares Equity (in Crs)		271.37	271.37	0.00%

Institution In Percentage

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	Mar-20	Mar-21	Change
Annual MF	5.45	6.79	1.34
Annual FPI	26.42	24.14	-2.28
Annual Others	3.70	3.77	0.07
Annual INST (Total)	35.57	34.70	-0.87
	Dec-20	Mar-21	Change
Quarterly MF	Dec-20 6.60	Mar-21 6.79	Change 0.19
Quarterly MF Quarterly FPI			-
,	6.60	6.79	0.19

Cash Flow (Amt in Crore)

		2020	2021	2Yr Avg
Cash Flow From Operation	(i)	13359	19618	16488.50
CAPEX	(j)	1866	1904	-
Free Cash Flow From Operation	(j)	11493	17714	14603.50
5 year FCF/Sales Ratio	(i)		14.04	-

U sing Growth Parameters

Yearly Results (Rs. in Cr.)

		Mar-20	Mar-21	Annual % Growth
Sales/Revenue	(i)	70676	75379	6.65
EBITDA(Incl Other Income)	(i)	17905	20975	17.15
Net Profit	(j)	11057	11169	1.01
Minority Interest	(i)	0.00	-24.00	-
Consolidated Net Profit		11057	11145	0.80
<u>EPS</u>	(i)	40.73	41.05	0.79
		Mar-20	Mar-21	Change
EBITDA Margin %	(i)	25.33	27.83	2.49
Net Profit Margin %	(i)	15.64	14.82	-0.83
5 Years EPS CAGR	i	-	9.58	-

Quarterly Results (Rs. in Cr.)

		Mar-20	Mar-21	YOY % Growth
YoY Sales/Revenue	i	18587	19641	5.67
YoY EBITDA(Incl Other Income)	i	5005	4793	-4.24
YoY Net Profit	i	3172	1111	-64.97
Minority Interest	i	0.00	-9.00	-
Consolidated Net Profit		3172	1102	-65.26
YoY Eps	i	11.68	4.06	-65.24

E xit Or Risk Parameters

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DE Ratio	(i)	2021	0.06
Total Debt(in Crs)	(i)	Mar-21	3595
Promoter Holding (in %)	(i)		60.33
Promoter Pledge (in %)	(i)		0.00
<u>Dividend Yield</u>	(i)		1.83
TTM Dividend Yield	(i)		0.88
Receivable Days	(i)		67
Net NPA Ratio (%)			NA
Current Ratio	(i)		2.48
3 Month Avg Turnover(in Crs)	(i)		580.88
Beta	(i)		0.67

Overview:

HCL Technologies Limited is engaged in providing a range of software development services, business process outsourcing services and information technology (IT) infrastructure services.

The Company's segments include software services, infrastructure management services and business process outsourcing services.

The software services segment provides application development and maintenance, enterprise application, software as a service (SAAS) application services and engineering, and research and development (R&D) services to global customers.

The infrastructure management services segment involves managing customer's IT assets.

The business process outsourcing services segment includes contact center and help desk services.

The Company delivers its solutions across select verticals, including financial services, manufacturing, retail and consumer products, media, publishing and entertainment, public services, energy and utility, healthcare, and travel, transport and logistics.

Finished Products

- 1. Software Development Charges- 98.17%
- 2. Servers- 0.80%
- 3. Others- 0.34%
- 4. Software Licence- 0.25%
- 5. Storage- 0.18%
- 6. Switches- 0.15%
- 7. Routers- 0.12%

Segment Revenue in Financial Year 2020

IT and Business services: 72% Engineering and R&D services: 17%

Products & Platforms : 11%

High entry barrier : High R&D Cost

INR 1286 Cr in FY 2020. Source on Page 335

Patents: applied or granted

29 patents filed in FY 2020, 16 Granted. Total 324 patents granted. Source on Page 31

Lower Cost of Production

HCL has developed a low cost customized Edge Computing system with AI platform SDK to enable distributed processing for real time video streaming analytics. Some of the use cases include suspicious activity tracking, shopping floor analytics, person tracking, 360 degree / aerial view of ATM/Vending machine, etc.

Strategic Alliances

Source on Page 46

Partnerships with Google, Microsoft, DELL, IBM, AWS and SAP. Source on Page 49

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Complex Processes

HCL and a leading ICT company have jointly developed a next-generation vector super computer, one of the fastest super computers in the world.

Source on Page 46

Distribution Network

225 Delivery Centres and 58 innovation labs in over 50 countries. Source on Page 53

Annual & Research Reports

Annual & Research Reports	
ANNUAL REPORT 2020	pdf
MOTILAL OSWAL JULY 2020	pdf
AXIS SECURITIES JULY 2020	pdf
GEOGIT BNP PARIBUS JULY 2020	pdf
CONFERENCE CALL OCTOBER 2020	pdf
INVESTOR PRESETATION OCTOBER 2020	pof
INVESTOR PRESETATION JANUARY 2021	pdf
Axis Securities January 2021	pdf
BOB Caps January 2021	pdf
GeoJit January 2021	pdf
HDFC Securities January 2021	pdf
Motilal Oswal January 2021	par
Nirmal Bang,January 2021	pdf
Prabhudas Lilladher,January 2021	par
SMC,January 2021	par
Axis April 2021	pdf
Prabhudas Lilladher April 2021	pot

Corporate Info

Corporate House	Shiv Nadar
<u>Chairman</u>	Roshni Nadar Malhotra
Managing Director	Shiv Nadar

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* Date updated daily at 8:30pm

We recommend to use only Weekly and Monthly charts. Daily charts are also given which are used for exits. We do not recommend Intraday. Minute or Hourly charts. The major levels come from weekly and monthly charts which the FII, fund managers usually use for entry and profit booking.

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Number of clients' complaint

- 1	At the beginning of the month	Received during the month	Resolved during the month	Pending at the end of the month	Reasons for pendency
	NIL	NIL	NIL	NIL	NIL

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