20-Year Old Leading National Cybersecurity & Managed Services Platform



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This is a leading **cybersecurity and managed services partner (VAR)** with a 19-year legacy. The company has successfully evolved from a project-based systems integrator into a recurring-revenue "MSP 3.0" leader, perfectly positioned to capture the high-growth Indian enterprise security market.

TARGET PRICE
$67,500,000

GROSS REVENUE
$38,000,000

EBITDA
$2,660,000

BUSINESS TYPE
Services

COUNTRY
India

BUSINESS ID
L#20261014

Investment Highlights

- **Established Pedigree:** 19-year operating history with a blue-chip base of **500+ enterprise customers** across BFSI, manufacturing, and healthcare.
- **Scalable Operations:** 24×7 centralized SOC/NOC operations leveraging a cost-efficient India-based delivery model.
- **High-Quality Revenue:** Targeting **~60% recurring revenue** by FY27E, driven by long-term managed services contracts.
- **AI-Enabled Advantage:** Proprietary framework that decouples headcount from revenue growth, materially reducing incident response times.
- **Capital-Light Model:** Services-led cash flow profile with minimal capital expenditure requirements.

Core Operating Engines

Engine	Focus Area	Value Proposition
DTS	Digital Transformation	Infrastructure modernization and hybrid cloud entry points.
CNS	Cybersecurity & Networking	Compliance-driven security and non-discretionary spend.
MSP 3.0	Managed Services	24×7 SOC/NOC operations delivering high-margin recurring revenue.
AI Framework	Automation	Embedded analytics reducing costs and increasing operating leverage.

Financial Highlights (Management Discussion)

Project Pi maintains a consistent growth trajectory with significant margin expansion potential through automation and service mix shift.

Metric	FY24A	FY25A	FY26E	FY27E
Revenue (USD Equiv.)	~ $29M	**~** $33M	~ $38M	~ $44M
Revenue CAGR	—	—	—	**~ 15%**

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Metric	FY24A	FY25A	FY26E	FY27E
Pure Services GM %	35-40%	35-40%	36-41%	37-42%
Adj. EBITDA Margin %	6.9%	7.8%	7.0%	7.5%
Recurring Rev. %	42%	50%	55%	60%

Strategic Note: The blended gross margin (~13-14%) includes hardware/software pass-through. The core services engine delivers high-value margins aligned with top-tier India IT benchmarks.

Market Context & Strategic Value

- **Market Tailwinds:** The Indian cybersecurity market is projected to reach **$3.5-4 Billion by 2025**, growing at an **18-20% CAGR**.
- **Growth Drivers:** Fueled by cloud adoption, regulatory mandates (CERT-In), and rising digital threat exposure.
- **Inorganic Opportunity:** Significant "Buy-and-Build" potential in a highly fragmented regional market.
- **Exit Pathway:** Clear 3-4 year trajectory toward a strategic exit or sponsor-led IPO.

Transaction Overview

- **The Deal:** Sale of a **controlling equity stake** to a global strategic or financial partner.
- **Continuity:** Founder shareholders will remain post-close with a **meaningful equity rollover** to ensure leadership continuity and accelerate international growth.

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