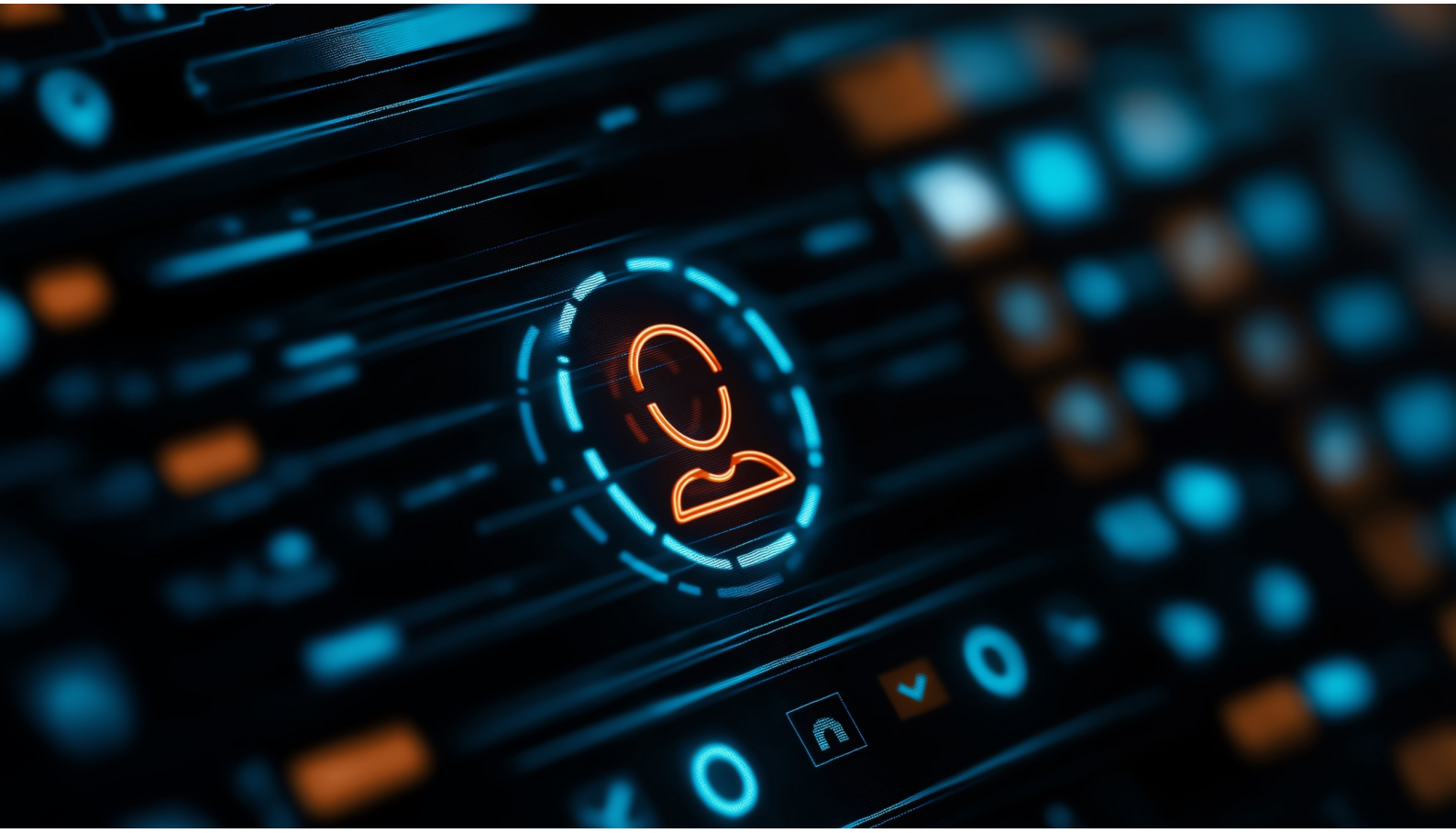
Established India BPO & Customer Experience Platform with 4,500+ Employees



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MERGERSCORP

Established India BPO & Customer Experience Platform with 4,500+ Employees

TARGET PRICE
$24,700,000

GROSS REVENUE
$18,000,000

EBITDA
$4,100,000

BUSINESS TYPE
Call Center

COUNTRY
India

BUSINESS ID
L#20261210

An opportunity to acquire a fast-growing, founder-led Business Process Outsourcing (BPO) and Customer Experience (CX) company headquartered in India, serving domestic and international clients through a structurally low-cost Tier-2 delivery network.

The company has demonstrated consistent organic growth, increasing revenue from US$1.3 million in FY21 to US$18 million in FY26, achieving a 19.5% revenue CAGR between FY23 and FY26.

Its expanding client portfolio has significantly reduced customer concentration, with the largest client's contribution declining from 55% to 25% of total billing, while the number of billed clients increased from 18 to 52 over the past three years.

The business benefits from a differentiated operating model, supported by government-backed public-private partnership (PPP) delivery centres, enabling substantially lower occupancy costs, adjusted EBITDA margins of approximately 22%, and a highly capital-efficient operating structure.

Key Investment Highlights

Strong and Consistent Growth

- Revenue increased from US$1.3M in FY21 to US$18M in FY26.
- 19.5% revenue CAGR between FY23 and FY26.
- Five consecutive years of organic revenue growth.
- Profit growth has consistently outpaced revenue growth.

Diversified and Resilient Client Portfolio

- Largest client concentration reduced from 55% to 25%.
- Top three clients account for approximately 58% of revenue, with concentration declining.
- 52 billed clients across multiple industries.
- Core verticals include healthcare, social e-commerce, and banking/financial services, each growing 18–26% annually.

Recurring and Contracted Revenue

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- Multi-year contracts across the client portfolio.
- Client retention exceeding 99% over the past six years.

Structural Cost Advantage

- Government-backed PPP delivery centres with nominal rental costs.
- Average rent of approximately US$0.37 per sq. ft., compared with US$1.37 in Tier-1 cities.
- Rental costs approximately 73% below Tier-1 market rates.
- Long-term 5+5-year lease arrangements.

Government Incentives

- Approximately US$1.1M already received under state investment-promotion policies since 2022.
- A further US$1.1M in incentives committed over the next two financial years.

Capital-Light Financial Structure

- Adjusted EBITDA margin of approximately 22%.
- Fixed assets of only US$0.20 per US$1.00 of revenue.
- Total borrowings of approximately US$0.75M.
- Finance costs represent approximately 0.5% of revenue.
- No working-capital debt.

Immediate Capacity for Expansion

- An additional 2,000-seat campus is coming into operation.
- Existing infrastructure provides immediate capacity to consolidate operations and accommodate further growth without significant additional capital investment.

Operational Resilience

- Delivery centres distributed across six Indian states.
- Ability to reroute operations between locations, ensuring business continuity in the event of local disruptions.

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International Expansion Potential

- Approximately 95% of current revenue is generated domestically.
- International contracts offer significant upside through higher-margin opportunities using the existing low-cost delivery infrastructure.
- Potential to serve as a ready-made India capability centre for an international strategic buyer.

Expansion into Government Services

- Established e-governance practice supported by multi-year public-sector contracts.
- Eligibility to participate in the majority of tenders within its operating segment.

Operations & Service Offering

The company employs approximately 4,500–4,600 billable professionals, with around 95% working on-site across its delivery centres.

Its core service portfolio includes:

- Customer Experience (CX) and Customer Support.
- Back-Office and Business Process Management.
- E-Governance and Public-Sector Services.

The company operates a proven, human-led and technology-enabled sales platform, having secured more than 30 clients across multiple industries.

Its commercial strategy is evolving towards dedicated industry verticals, with established practices in:

- Healthcare.
- E-commerce.
- Financial Services.

Further expansion is planned into insurance, automotive, travel, and enterprise technology.

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