

monster®

EMPLOYMENT INDEX

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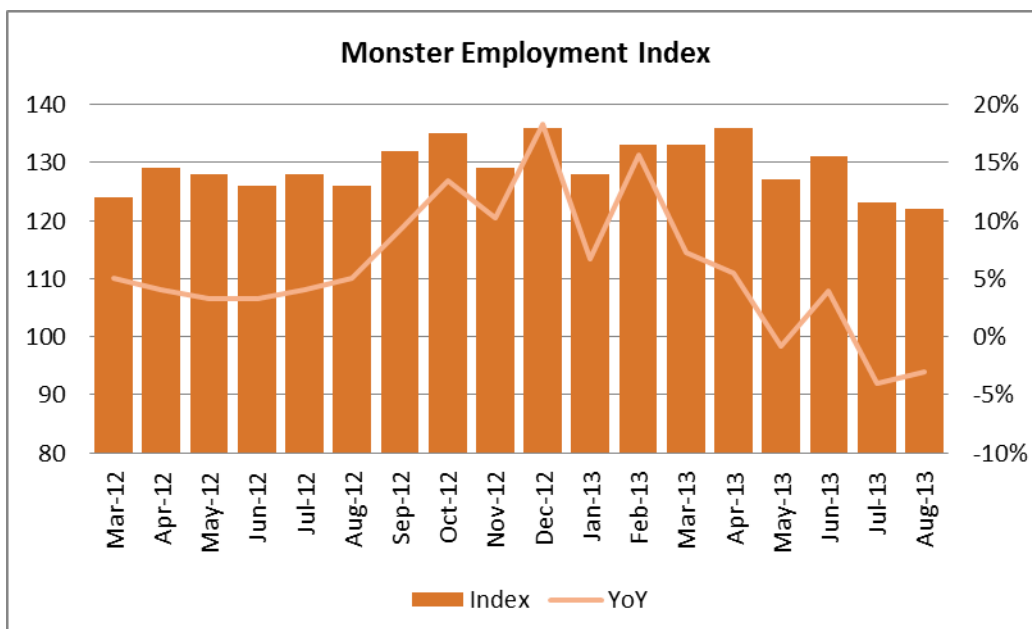
Monster Employment Index India Declines Three Percent Year-over-Year

August 2013 Index Highlights:

- Index level declines three percent from a year ago in August
- Import/ Export followed by Healthcare, Bio Technology & Life Sciences, Pharmaceuticals industry pace all industries on the year. Media and Entertainment records steepest annual decline
- Demand among occupations up most for Healthcare followed by Customer Service professionals
- Chandigarh registers the strongest annual growth

The Monster Employment Index India is a monthly gauge of online job posting activity based on a real-time review of millions of employer job opportunities culled from a large representative selection of career Web sites and online job listings across India. The Index does not reflect the trend of any one advertiser or source, but is an aggregate measure of the change in job listings across the industry.

“The decline in annual growth is reflective of the uncertain economic/ political scenario. The employers are adopting a cautious approach while hiring due to prevailing challenging economic conditions which is reflected in the index,” said Sanjay Modi, Managing Director, Monster.com (India/ Middle- East/ South East Asia).



Monster Employment Index India results for the past 18 months are as follows:

Mar 12	Apr 12	May 12	Jun 12	Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	Jul 13	Aug 13	Y-O-Y
124	129	128	126	128	126	132	135	129	136	128	133	133	136	127	131	123	122	-3%

Industry Year-over-year Trends: 11 of the 27 industry sectors monitored by the Monster Employment Index registered expansion in online recruitment activity between August'12 and August'13.

- **Import/Export** sector (up 21 percent) followed by **Healthcare, Bio Technology & Life Sciences, Pharmaceuticals** sector (up 20 percent) exhibited the highest annual growth among sectors
- **Education** sector (up 12 percent), showed positive growth in online recruitment activity between July'12 and July'13
- **Media & Entertainment** sector (down 21percent) showed steepest annual decline

Top Growth Industries

Year-over-year Growth	Aug 12	Aug 13	% Growth Y-o-y
Import / Export	89	108	21%
Healthcare, Bio Technology & Life Sciences, Pharmaceuticals	116	139	20%
Education	100	112	12%
BPO/ITES	104	115	11%
Real Estate	130	143	10%

Lowest Growth Industries

Year-over-year Growth	Aug 12	Aug 13	% Growth Y-o-y
Agro based industries	128	112	-13%
Travel and Tourism	142	123	-13%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	103	88	-15%
Shipping/Marine	161	132	-18%
Media & Entertainment	133	105	-21%

Occupation Year-over-year Trends: Online demand improved in three of 13 occupational groups monitored by the Monster Employment Index between August'12 and August'13.

- **Healthcare** (up 28 percent) followed by **Customer Service** (up 12 percent) charted the most substantial annual gains amongst the occupational groups
- **Senior Management** (down 48 percent) exhibited the steepest annual decline among occupation groups

Top Growth Occupations

Year-over-year Growth	Aug 12	Aug 13	% Growth Y-o-y
Health Care	108	138	28%
Customer Service	104	116	12%
Marketing & Communications	100	101	1%
Legal	132	131	-1%
Sales & Business Development	131	129	-2%

Lowest Growth Occupations

Year-over-year Growth	Aug 12	Aug 13	% Growth Y-o-y
Hospitality & Travel	133	128	-4%
Purchase/ Logistics/ Supply Chain	139	127	-9%
Engineering /Production	114	104	-9%
Arts/Creative	146	101	-31%
Senior Management	144	75	-48%

Geographic year-over-year Trends: Online recruitment activity was up on the year in eight of 13 locations monitored by the index.

- **Chandigarh** (up 16 percent) followed by **Ahmedabad** (up 14 percent) led all cities in annual growth
- Among major metro-areas, **Kolkata** (up 11 percent) followed by **Delhi-NCR** (up 9 percent) registered the highest annual growth

Top Growth Cities

Year-over-year Growth	Aug 12	Aug 13	% Growth Y-o-y
Chandigarh	118	137	16%
Ahmedabad	109	124	14%
Kolkata	121	134	11%
Delhi-NCR	120	131	9%
Bangalore	134	143	7%

Lowest Growth Cities

Year-over-year Growth	Aug 12	Aug 13	% Growth Y-o-y
Jaipur	148	146	-1%
Chennai	129	125	-3%
Kochi	173	141	-18%
Baroda	140	97	-31%
Coimbatore	194	132	-32%

By Industry

	2012					2013							
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
IT - Hardware, Software	131	144	143	130	139	138	138	141	140	135	146	142	142
BPO/ITES	104	117	123	119	125	128	133	147	149	124	121	118	115
Engineering, Cement, Construction, Iron/Steel	115	134	149	137	129	120	111	116	127	117	123	123	118
Banking/Financial Services/Insurance	91	96	97	93	100	102	105	109	108	97	97	98	89
Education	100	102	106	106	113	117	114	116	120	124	125	117	112
Production and Manufacturing	84	89	90	76	83	82	81	87	86	87	81	79	77
Automotive/Ancillaries/Tyres	137	142	149	141	146	146	123	151	149	138	132	127	123
Telecom/ISP	96	109	113	103	102	89	90	102	112	100	98	109	96
Oil/Gas/Petroleum, Power	129	127	136	123	124	123	126	130	132	125	129	126	128
Healthcare, Bio Technology & Life Sciences, Pharmaceuticals	116	125	133	123	135	136	141	153	155	144	142	134	139
Advertising, Market Research, Public Relations	96	101	106	101	108	107	114	123	132	104	103	98	99
Travel & Tourism	142	147	160	148	159	155	149	156	161	136	140	131	123
Home Appliances	129	130	133	123	130	129	138	146	149	131	133	118	126
Media & Entertainment	133	141	156	147	146	141	137	155	161	116	118	112	105
Chemicals/Plastic/Rubber, Paints, Fertilizer/Pesticides	103	104	117	105	108	108	114	134	145	109	100	85	88
Consumer Goods/FMCG, Food & Packaged Food	118	122	125	116	123	126	127	141	145	122	118	116	118
Garments/Textiles/Leather, Gems & Jewellery	137	160	154	142	157	149	162	173	187	142	135	130	128
Real Estate	130	137	145	139	150	148	158	166	175	153	153	150	143
Retail	141	168	169	149	160	151	164	172	169	163	164	147	150
Logistic, Courier/Freight/Transportation	134	146	146	139	143	147	147	155	158	132	131	127	123
Import/Export	89	95	101	93	104	98	103	117	126	114	111	103	108
Government/PSU/Defence	94	98	104	106	109	107	111	117	125	96	98	105	92
Shipping/Marine	161	163	171	160	164	152	184	190	172	130	116	119	132
Printing/Packaging	112	120	126	118	121	114	128	142	154	112	115	105	106

NGO/Social Services	112	121	131	132	146	133	141	149	161	128	112	107	119
Agro based industries	128	131	130	129	134	127	146	158	173	123	126	122	112
Office Equipment/Automation	97	103	111	101	102	97	110	127	129	105	100	96	98

By Occupation

	2012					2013							
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Software, Hardware, Telecom	123	131	130	119	112	110	113	119	118	112	117	114	119
Customer Service	104	113	118	116	122	125	135	147	149	134	125	117	116
Engineering/Production	114	115	118	109	115	115	116	116	113	109	110	105	104
Finance & Accounts	98	112	103	98	102	101	102	103	105	101	104	100	96
Sales & Business Development	131	138	136	122	133	133	138	142	146	141	136	127	129
Senior Management	144	140	145	127	138	106	68	72	77	69	71	64	75
HR & Admin	109	111	112	110	118	118	121	122	123	118	116	106	105
Marketing & Communications	100	102	106	102	104	103	104	104	109	104	104	104	101
Health Care	108	115	124	114	132	133	138	147	142	139	141	126	138
Purchase/Logistics/Supply Chain	139	145	146	134	137	136	136	131	135	128	134	128	127
Hospitality & Travel	133	140	143	138	152	147	141	139	138	130	138	148	128
Legal	132	136	139	132	141	133	143	145	144	130	132	128	131
Arts/Creative	146	148	150	151	156	151	154	142	149	102	104	102	101

By Local Market

	2012					2013							
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Mumbai	132	137	139	130	144	136	146	147	147	130	131	125	138
Bangalore	134	144	143	136	156	141	149	157	155	135	139	133	143
Delhi-NCR	120	125	126	115	135	132	137	137	144	134	135	131	131
Hyderabad	124	131	128	125	137	127	138	136	138	125	128	124	128
Chennai	129	133	131	126	140	134	142	142	143	127	129	119	125
Pune	125	132	126	121	133	129	135	135	136	123	125	125	130
Kolkata	121	128	123	117	137	133	137	135	140	136	141	135	134
Ahmedabad	109	108	108	106	120	126	129	132	129	115	120	114	124
Chandigarh	118	139	134	136	140	134	143	159	152	133	140	135	137
Kochi	173	179	191	175	152	167	141	159	169	139	141	138	141
Baroda	140	152	162	147	158	159	136	145	154	100	108	93	97
Coimbatore	194	193	199	156	151	148	144	152	179	132	128	128	132
Jaipur	148	152	159	151	154	146	156	169	173	149	151	143	146

About the Monster Employment Index

Launched in May 2010 with data collected since October 2009, the Monster Employment Index is a broad and comprehensive monthly analysis of online job posting activity in India conducted by Monster India. Based on a real-time review of millions of employer job opportunities culled from a large, representative selection of online career outlets, including Monster India, the Monster Employment Index presents a snapshot of employer online recruitment activity nationwide. The Monster Employment Index's underlying data is validated for accuracy by Research America, Inc. – an independent, third-party auditing firm – to ensure that measured national online job recruitment activity is within a margin of error of +/- 1.05%. Monster has taken due care in compiling and processing the data available from various sources for Monster Employment Index, but does not guarantee the accuracy, adequacy or completeness of any information and is not responsible for any errors or omissions or action / decision taken or for the results obtained from the use of such information.

About Monster Worldwide

Monster Worldwide, Inc. (NYSE: MWW), parent company of Monster, the premier global online employment solution for more than a decade, strives to inspire people to improve their lives. With a local presence in key markets in North America, Europe, and Asia, Monster works for everyone by connecting employers with quality job seekers at all levels and by providing personalized career advice to consumers globally. Through online media sites and services, Monster delivers vast, highly targeted audiences to advertisers. Monster Worldwide is a member of the S&P 500 index. To learn more about Monster's industry-leading products and services, visit www.monster.com. More information about Monster Worldwide is available at <http://about-monster.com/>

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