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EMPLOYMENT INDEX

Monster Employment Index India Quarter Overview October-December 2013

- ***Monster Employment Index India continues to chart negative growth on the year in October and November***
- ***December MEI India registers decline of one percent Year-over-Year***

October 2013 Index Overview:

- Monster Employment Index India registered a negative year-on year growth rate for the fourth time in succession in October'13. The Index plunged remains eight percent below October 2012
- At the same time, the Index recorded a positive growth on the month following three successive declines; up three percent. The three-month growth rate was also positive for the first time since April'13
- Year-on-Year, Healthcare, Bio Technology & Life Sciences led all industry sectors while Media & Entertainment saw the most dramatic plunge
- Among major sectors, Engineering, Cement, Construction, Iron/ Steel charted one of the steepest annual declines in October'13; down 19 percent
- Manufacturing and Commerce also presented a gloomy picture with Production and Manufacturing; and Logistic, Courier/ Freight/ Transportation registering an eight and 17 percent decline from October 2012 respectively
- Banking/ Financial Services, Insurance; and IT - Hardware, Software exhibited marginal growth year-on-year while BPO/ITES witnessed the second successive annual decline of the series
- Among occupation groups, HR & Admin saw the maximum growth in demand in the long-term. Online demand for Senior Management professionals declined the most
- Demand for Finance & Accounts; and Sales & Business Development professionals exceeded the year-ago level in October'13 having charted negative annual growth rates the last few months
- Ahmedabad was the top gainer year-on-year and also the only city to record a double digit growth rate this month
- Among major job markets, Delhi-NCR and Mumbai reported improved recruitment level when compared to October'12. Delhi-NCR made it among the top five while Bangalore saw online recruitment activity slip one percent below the year-ago level

November 2013 Index Overview:

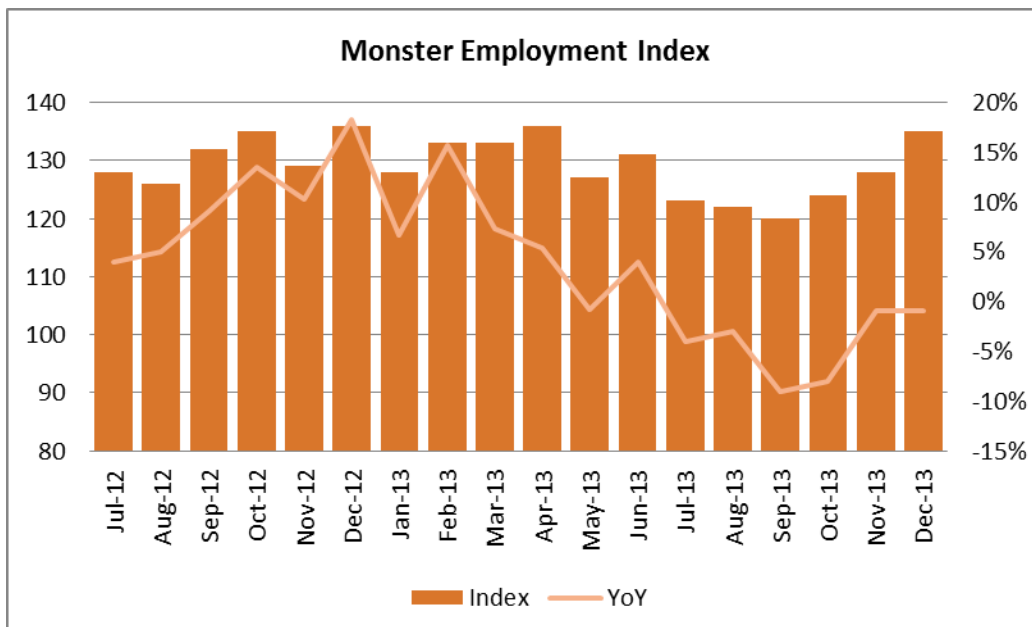
- Monster Employment Index India approaches the year-ago level as the rate of annual growth improves; up seven percentage points between October and November 2013. Nevertheless, the growth rate continues to be negative
- Month-on-month, the Index records an additional three percent growth in online recruitment activity
- IT - Hardware, Software charts the steepest year-on-year growth among all sectors
- Oil/ Gas/ Petroleum, Power exhibits the first positive year-on-year growth since April 2012.
- Both Production and Manufacturing; and Logistic, Courier/ Freight/ Transportation sectors continue to chart fewer opportunities when compared to the corresponding period a year-ago.
- Healthcare followed by HR & Admin personnel register the most notable growth in long-term demand
- Ahmedabad continues to lead all 13 cities by the way of long-term growth

December 2013 Index Highlights:

- Index level declines one percent from a year ago in December
- IT – Hardware, Software pace all industries on the year. NGO/Social Services records steepest annual decline
- Demand among occupations improves the most for Software, Hardware, Telecom professionals
- Ahmedabad 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.

“Monster Employment Index India continues to chart sluggish growth with recruitment activity marginally lower than the year-ago level. While there is a long way to go before it catches up the pre-recession level, the situation appears to be gradually improving as the Index exhibits positive growth on the month. Recent reports show confidence among businesses regarding the coming quarter but will definitely lead them to adopt a cautious approach while hiring” 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:

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	Sep 13	Oct 13	Nov 13	Dec 13	Y-O-Y
128	126	132	135	129	136	128	133	133	136	127	131	123	122	120	124	128	135	-1%

Industry Year-over-year Trends: Online recruitment activity exceeded the year-ago level in 13 of the 27 industry sectors monitored by the Index

- **IT - Hardware, Software** sector (up 22 percent) exhibited the highest annual growth among sectors
- Online recruitment in the **Oil/ Gas/ Petroleum, Power** (up 20 percent) rebounded. The sector marked the second positive month-on-month as well as year-on-year growth following an 18 month low
- Manufacturing and Commerce continues to exhibit dampened hiring trends. Online hiring in **Production and Manufacturing** (down eight percent); and **Logistic, Courier/ Freight/ Transportation** (down 10 percent) is lower than the year-ago yet again
- **NGO/Social Services** (down 17 percent) showed steepest annual decline

Top Growth Industries

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
IT - Hardware, Software	139	169	22%
Oil/ Gas/ Petroleum, Power	124	149	20%
Telecom/ISP	102	122	20%
Healthcare, Bio Technology & Life Sciences, Pharmaceuticals	135	152	13%
Banking/ Financial Services , Insurance	100	105	5%

Lowest Growth Industries

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Production and Manufacturing	83	76	-8%
Logistic, Courier/ Freight/ Transportation	143	128	-10%
Automotive/ Ancillaries / Tyres	146	127	-13%
Shipping/Marine	164	139	-15%
NGO/Social Services	146	121	-17%

Occupation Year-over-year Trends: Six of the 13 occupation groups monitored by the Index saw online demand exceed the year-ago level.

- **Software, Hardware, Telecom** (up 22 percent) professionals saw the most notable growth in demand among all occupations groups between December'12 and December'13
- Demand for **Customer Service** (down two percent) personnel slipped below the year-ago level
- Demand for **Marketing & Communications** (up three percent) professional surpassed the level attained in the corresponding period a year-ago for the first time since August'13
- **Senior Management** (down 41 percent) exhibited the steepest annual decline among occupation groups and also a negative year-on-year growth for the twelfth spell in succession

Top Growth Occupations

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Software, Hardware, Telecom	112	137	22%
Health Care	132	148	12%
Finance & Accounts	102	111	9%
Legal	141	149	6%
HR & Admin	118	124	5%

Lowest Growth Occupations

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Hospitality & Travel	152	144	-5%
Purchase/ Logistics/ Supply Chain	137	129	-6%
Engineering /Production	115	106	-8%
Arts/Creative	156	104	-33%
Senior Management	138	82	-41%

Geographic year-over-year Trends: Online opportunities exceeded the year-ago level in nine of the 13 cities monitored by the Index.

- **Ahmedabad** (up 13 percent) was the only city to register a double-digit year-on-year growth rate
- Among major metro-areas, **Hyderabad** (up seven percent) was the only city to make it among the top five, year-on-year. **Chennai** (down three percent) saw online recruitment activity slip below the year-ago level after a month of positive annual growth.
- **Baroda** (down 30 percent) registered the most significant year-on-year decline followed by **Jaipur** (down 12 percent).

Top Growth Cities

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Ahmedabad	120	135	13%
Kolkata	137	150	9%
Chandigarh	140	152	9%
Kochi	152	165	9%
Hyderabad	137	146	7%

Lowest Growth Cities

Year-over-year Growth	Dec 12	Dec 13	% Growth Y-o-y
Mumbai	144	149	3%
Chennai	140	136	-3%
Coimbatore	151	133	-12%
Jaipur	154	135	-12%
Baroda	158	111	-30%

By Industry

	2012	2013											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
IT - Hardware, Software	139	138	138	141	140	135	146	142	142	140	145	150	169
BPO/ITES	125	128	133	147	149	124	121	118	115	113	118	113	123
Engineering, Cement, Construction, Iron/Steel	129	120	111	116	127	117	123	123	118	111	121	124	131
Banking/Financial Services/Insurance	100	102	105	109	108	97	97	98	89	90	100	96	105
Education	113	117	114	116	120	124	125	117	112	107	109	116	116
Production and Manufacturing	83	82	81	87	86	87	81	79	77	78	83	73	76
Automotive/Ancillaries/Tyres	146	146	123	151	149	138	132	127	123	114	123	120	127
Telecom/ISP	102	89	90	102	112	100	98	109	96	83	98	103	122
Oil/Gas/Petroleum, Power	124	123	126	130	132	125	129	126	128	103	129	141	149
Healthcare, Bio Technology & Life Sciences, Pharmaceuticals	135	136	141	153	155	144	142	134	139	130	143	139	152
Advertising, Market Research, Public Relations	108	107	114	123	132	104	103	98	99	96	102	104	113
Travel & Tourism	159	155	149	156	161	136	140	131	123	117	141	140	148
Home Appliances	130	129	138	146	149	131	133	118	126	124	125	121	128
Media & Entertainment	146	141	137	155	161	116	118	112	105	96	115	123	136
Chemicals/Plastic/Rubber, Paints, Fertilizer/Pesticides	108	108	114	134	145	109	100	85	88	79	89	88	101
Consumer Goods/FMCG, Food & Packaged Food	123	126	127	141	145	122	118	116	118	102	114	115	121
Garments/Textiles/Leather, Gems & Jewellery	157	149	162	173	187	142	135	130	128	119	140	141	150
Real Estate	150	148	158	166	175	153	153	150	143	138	143	141	153
Retail	160	151	164	172	169	163	164	147	150	145	159	149	161
Logistic, Courier/Freight/Transportation	143	147	147	155	158	132	131	127	123	109	121	118	128
Import/Export	104	98	103	117	126	114	111	103	108	106	107	100	109
Government/PSU/Defence	109	107	111	117	125	96	98	105	92	83	94	142	108
Shipping/Marine	164	152	184	190	172	130	116	119	132	124	132	145	139
Printing/Packaging	121	114	128	142	154	112	115	105	106	102	117	114	122
NGO/Social Services	146	133	141	149	161	128	112	107	119	108	121	114	121
Agro based industries	134	127	146	158	173	123	126	122	112	105	119	129	133
Office Equipment/Automation	102	97	110	127	129	105	100	96	98	89	102	97	107

By Occupation

	2012	2013											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Software, Hardware, Telecom	112	110	113	119	118	112	117	114	119	115	114	125	137
Customer Service	122	125	135	147	149	134	125	117	116	111	120	116	120
Engineering/Production	115	115	116	116	113	109	110	105	104	97	110	108	106
Finance & Accounts	102	101	102	103	105	101	104	100	96	95	108	104	111
Sales & Business Development	133	133	138	142	146	141	136	127	129	123	141	135	131
Senior Management	138	106	68	72	77	69	71	64	75	71	68	76	82
HR & Admin	118	118	121	122	123	118	116	106	105	106	126	127	124
Marketing & Communications	104	103	104	104	109	104	104	104	101	94	105	99	107
Health Care	132	133	138	147	142	139	141	126	138	123	136	134	148
Purchase/Logistics/Supply Chain	137	136	136	131	135	128	134	128	127	123	130	129	129
Hospitality & Travel	152	147	141	139	138	130	138	148	128	123	140	137	144
Legal	141	133	143	145	144	130	132	128	131	130	142	144	149
Arts/Creative	156	151	154	142	149	102	104	102	101	102	104	103	104

By Local Market

	2012	2013											
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mumbai	144	136	146	147	147	130	131	125	138	135	141	146	149
Bangalore	156	141	149	157	155	135	139	133	143	144	142	153	162
Delhi-NCR	135	132	137	137	144	134	135	131	131	130	130	133	140
Hyderabad	137	127	138	136	138	125	128	124	128	129	128	138	146
Chennai	140	134	142	142	143	127	129	119	125	126	126	133	136
Pune	133	129	135	135	136	123	125	125	130	130	129	136	141
Kolkata	137	133	137	135	140	136	141	135	134	136	127	131	150
Ahmedabad	120	126	129	132	129	115	120	114	124	126	124	126	135
Chandigarh	140	134	143	159	152	133	140	135	137	133	144	148	152
Kochi	152	167	141	159	169	139	141	138	141	137	156	162	165
Baroda	158	159	136	145	154	100	108	93	97	101	108	107	111
Coimbatore	151	148	144	152	179	132	128	128	132	133	150	133	133
Jaipur	154	146	156	169	173	149	151	143	146	143	141	136	135

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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