

monster®

EMPLOYMENT INDEX

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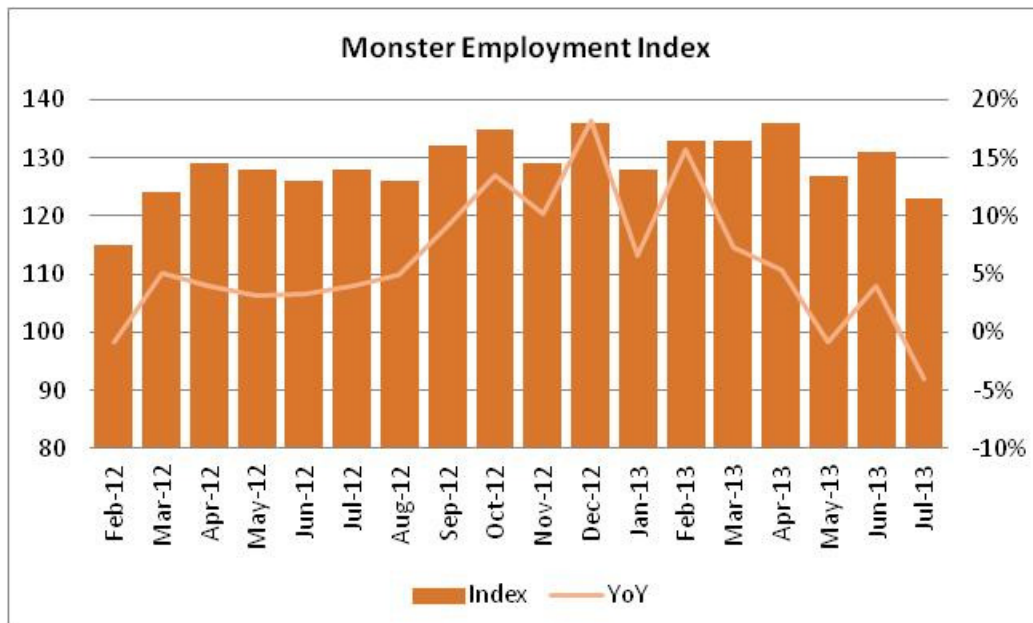
Monster Employment Index India Declines Four Percent Year-over-Year

July 2013 Index Highlights:

- Index level declines four percent from a year ago in July
- Telecom/ISP followed by BPO/ITES industry pace all industries on the year. Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides record steepest annual decline
- Demand among occupations up most for Customer Service followed by Hospitality & Travel professionals
- Kolkata 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 prevailing challenging economic conditions. Keeping in mind the uncertain economic/ political scenario, cCompanies are adopting a cautious approach while hiring 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:

Feb 12	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	Y-O-Y
115	124	129	128	126	128	126	132	135	129	136	128	133	133	136	127	131	123	-4%

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

- **Telecom/ ISP** sector (up 20 percent) followed by **BPO/ITES** sector (up 18 percent) exhibited the highest annual growth among sectors
- **Real Estate** sector (up 12 percent), showed positive growth in online recruitment activity between July'12 and July'13
- **Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides** (down 13 percent) showed steepest annual decline

Top Growth Industries

Year-over-year Growth	Jul 12	Jul 13	% Growth Y-o-y
Telecom/ISP	91	109	20%
BPO/ITES	100	118	18%
Real Estate	134	150	12%
Government/ PSU/ Defence	94	105	12%
Engineering, Cement, Construction, Iron/ Steel	111	123	11%

Lowest Growth Industries

Year-over-year Growth	Jul 12	Jul 13	% Growth Y-o-y
Media & Entertainment	128	112	-13%
Home Appliances	136	118	-13%
Printing/ Packaging	123	105	-15%
Shipping/Marine	140	119	-15%
Chemicals/ Plastic/ Rubber, Paints, Fertilizer/ Pesticides	102	85	-17%

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

- **Customer Service** (up 18 percent) followed by **Hospitality & Travel**(up 10 percent) charted the most substantial annual gains amongst the occupational groups
- **Senior Management** (down 56 percent) exhibited the steepest annual decline among occupation groups

Top Growth Occupations

Year-over-year Growth	Jul 12	Jul 13	% Growth Y-o-y
Customer Service	99	117	18%
Hospitality & Travel	135	148	10%
Health Care	115	126	10%
Marketing & Communications	102	104	2%

Lowest Growth Occupations

Year-over-year Growth	Jul 12	Jul 13	% Growth Y-o-y
Software, Hardware, Telecom	123	114	-7%
Purchase/ Logistics/ Supply Chain	139	128	-8%
Engineering /Production	118	105	-11%
Arts/Creative	139	102	-27%

Sales & Business Development	125	127	2%
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Senior Management	145	64	-56%
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Geographic year-over-year Trends: Online recruitment activity was up on the year in six of 13 locations monitored by the index.

- **Kolkata** (up 21 percent) followed by **Chandigarh** (up 15 percent) led all cities in annual growth
- Among major metro-areas, **Kolkata** (up 21 percent) followed by **Hyderabad** (up 2 percent) registered the highest annual growth

Top Growth Cities

Year-over-year Growth	Jul 12	Jul 13	% Growth Y-o-y
Kolkata	112	135	21%
Chandigarh	117	135	15%
Ahmedabad	110	114	4%
Hyderabad	122	124	2%
Pune	124	125	1%

Lowest Growth Cities

Year-over-year Growth	Jul 12	Jul 13	% Growth Y-o-y
Mumbai	130	125	-4%
Chennai	126	119	-6%
Kochi	172	138	-20%
Baroda	133	93	-30%
Coimbatore	193	128	-34%

By Industry

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

NGO/Social Services	113	112	121	131	132	146	133	141	149	161	128	112	107
Agro based industries	126	128	131	130	129	134	127	146	158	173	123	126	122
Office Equipment/Automation	103	97	103	111	101	102	97	110	127	129	105	100	96

By Occupation

	2012						2013						
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Software, Hardware, Telecom	123	123	131	130	119	112	110	113	119	118	112	117	114
Customer Service	99	104	113	118	116	122	125	135	147	149	134	125	117
Engineering/Production	118	114	115	118	109	115	115	116	116	113	109	110	105
Finance & Accounts	101	98	112	103	98	102	101	102	103	105	101	104	100
Sales & Business Development	125	131	138	136	122	133	133	138	142	146	141	136	127
Senior Management	145	144	140	145	127	138	106	68	72	77	69	71	64
HR & Admin	113	109	111	112	110	118	118	121	122	123	118	116	106
Marketing & Communications	102	100	102	106	102	104	103	104	104	109	104	104	104
Health Care	115	108	115	124	114	132	133	138	147	142	139	141	126
Purchase/Logistics/Supply Chain	139	139	145	146	134	137	136	136	131	135	128	134	128
Hospitality & Travel	135	133	140	143	138	152	147	141	139	138	130	138	148
Legal	126	132	136	139	132	141	133	143	145	144	130	132	128
Arts/Creative	139	146	148	150	151	156	151	154	142	149	102	104	102

By Local Market

	2012						2013						
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Mumbai	130	132	137	139	130	144	136	146	147	147	130	131	125
Bangalore	134	134	144	143	136	156	141	149	157	155	135	139	133
Delhi-NCR	130	120	125	126	115	135	132	137	137	144	134	135	131
Hyderabad	122	124	131	128	125	137	127	138	136	138	125	128	124
Chennai	126	129	133	131	126	140	134	142	142	143	127	129	119
Pune	124	125	132	126	121	133	129	135	135	136	123	125	125
Kolkata	112	121	128	123	117	137	133	137	135	140	136	141	135
Ahmedabad	110	109	108	108	106	120	126	129	132	129	115	120	114
Chandigarh	117	118	139	134	136	140	134	143	159	152	133	140	135
Kochi	172	173	179	191	175	152	167	141	159	169	139	141	138
Baroda	133	140	152	162	147	158	159	136	145	154	100	108	93
Coimbatore	193	194	193	199	156	151	148	144	152	179	132	128	128
Jaipur	148	148	152	159	151	154	146	156	169	173	149	151	143

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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