

Global Listed IT Services Company Quarterly Monitor Q2 2024

***Headline of Quarterly Results
of Top 20 Listed global IT Services***

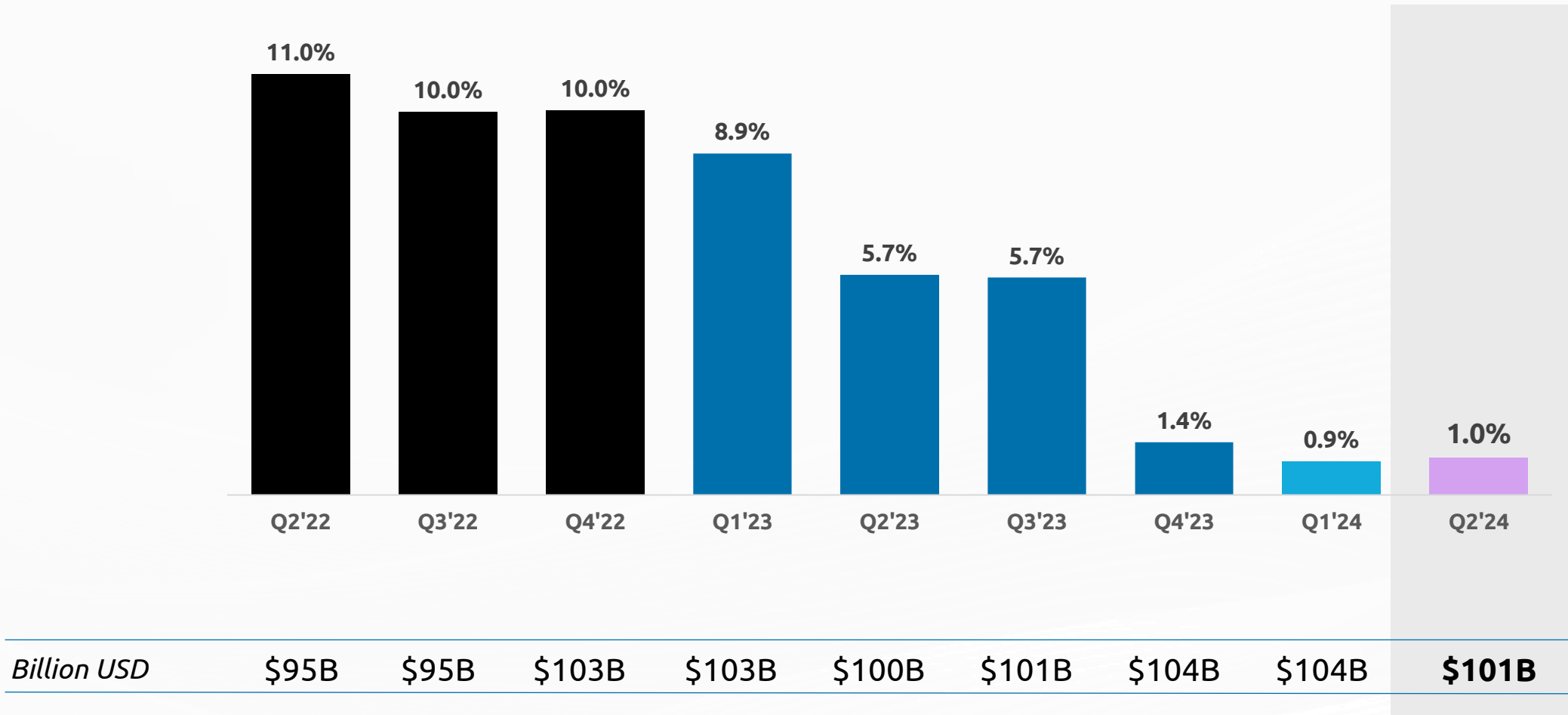
29 August 2024

Covering the following 20 Listed global IT Services companies

YoY Quarterly Combined Revenue evolution

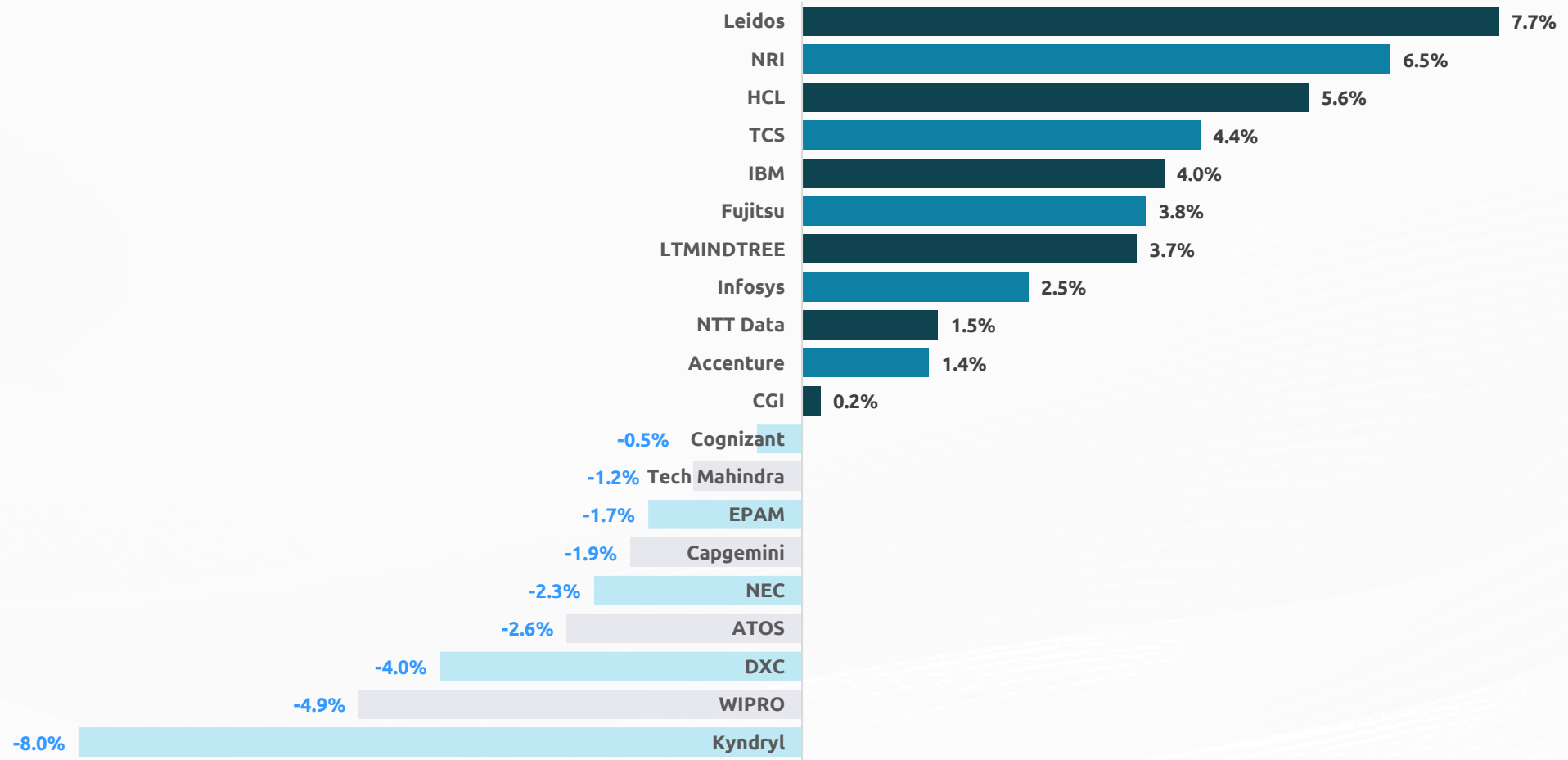
Q2'22 +1.0% YoY growth, continuing last two quarters of low YoY growth



OUTLOOK: Q2 Actual growth equal to combined outlook provided by providers Q1, **Q3 outlook +1.6% and Q4 at +2.3%**

Q2'24 YoY CC Revenue Growth % by company

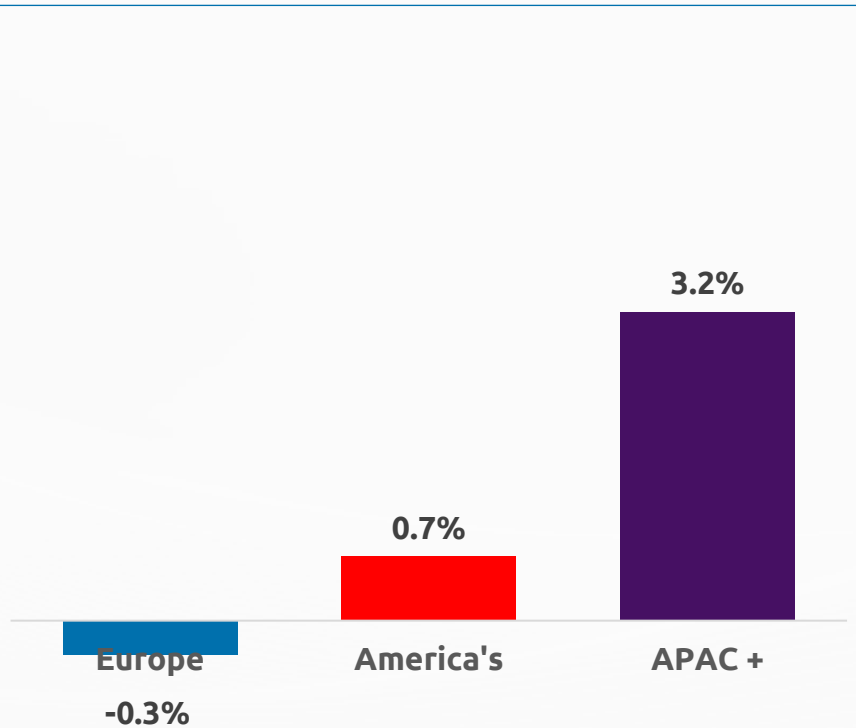
Top 20 average at +1.0% growth – detail of individual providers shows large variances, from -8% to +7.7%,



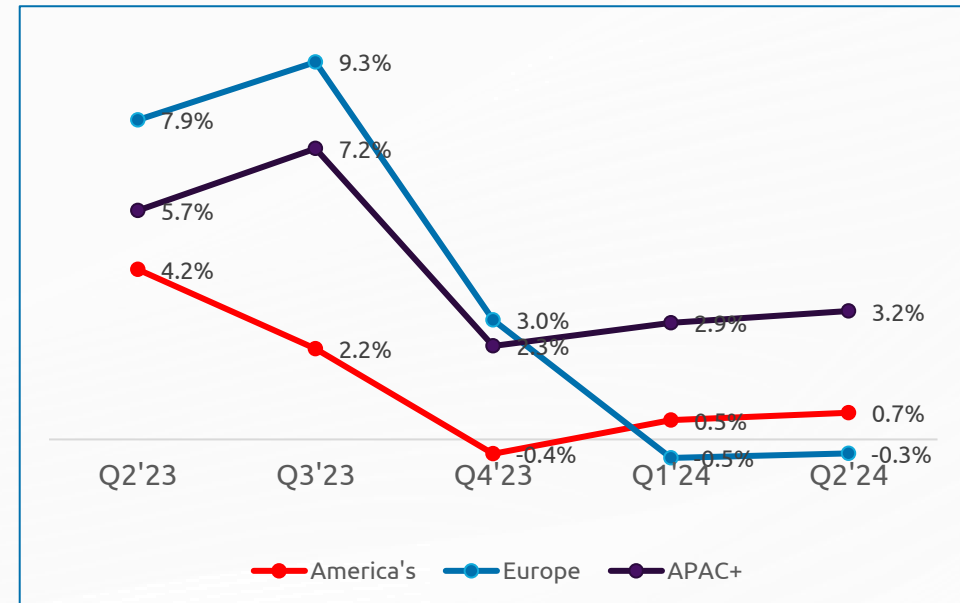
YoY Revenue Growth By Region

APAC region is continuing to show +3% YoY growth rate, Europe 2nd Quarter of decline.

Q2'24 YoY revenue evolution by Region



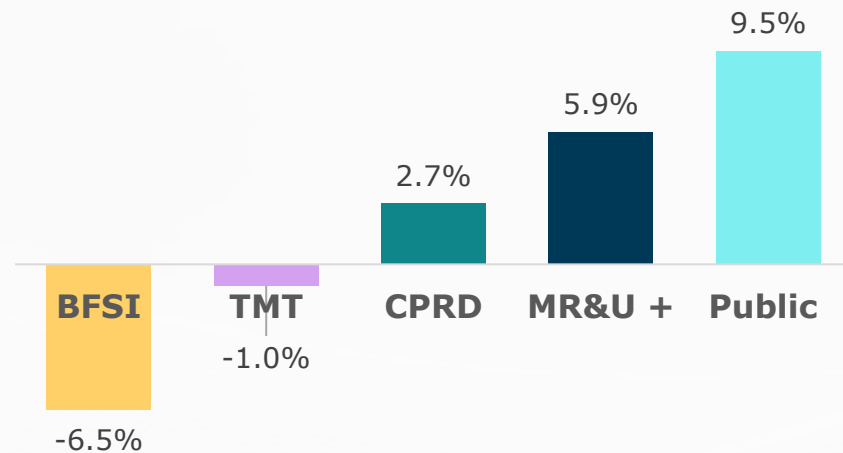
Q2'23 TO Q2'24 YoY revenue evolution by Region



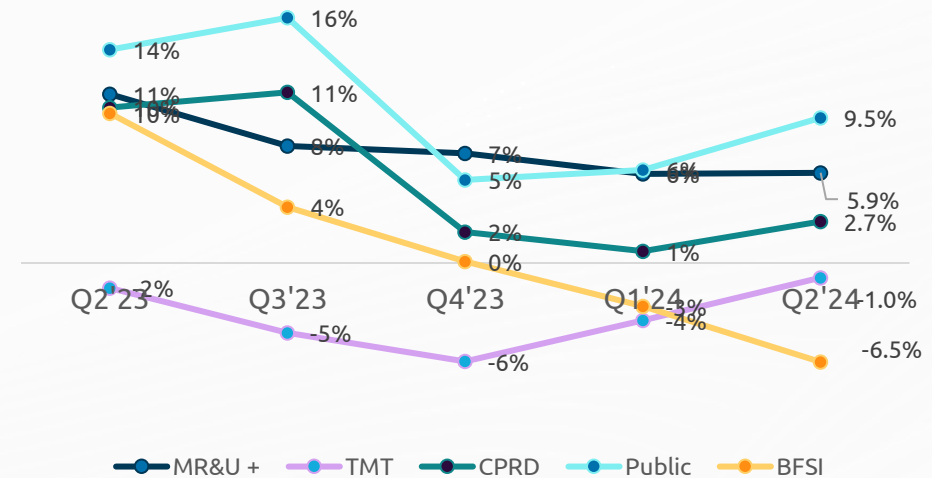
YoY Revenue Growth By Industry

Public Sector and MR&U continue at +5% YoY growth, BFSI large YoY decline at -6.5%

Q2'24 YoY Revenue Growth by Industry



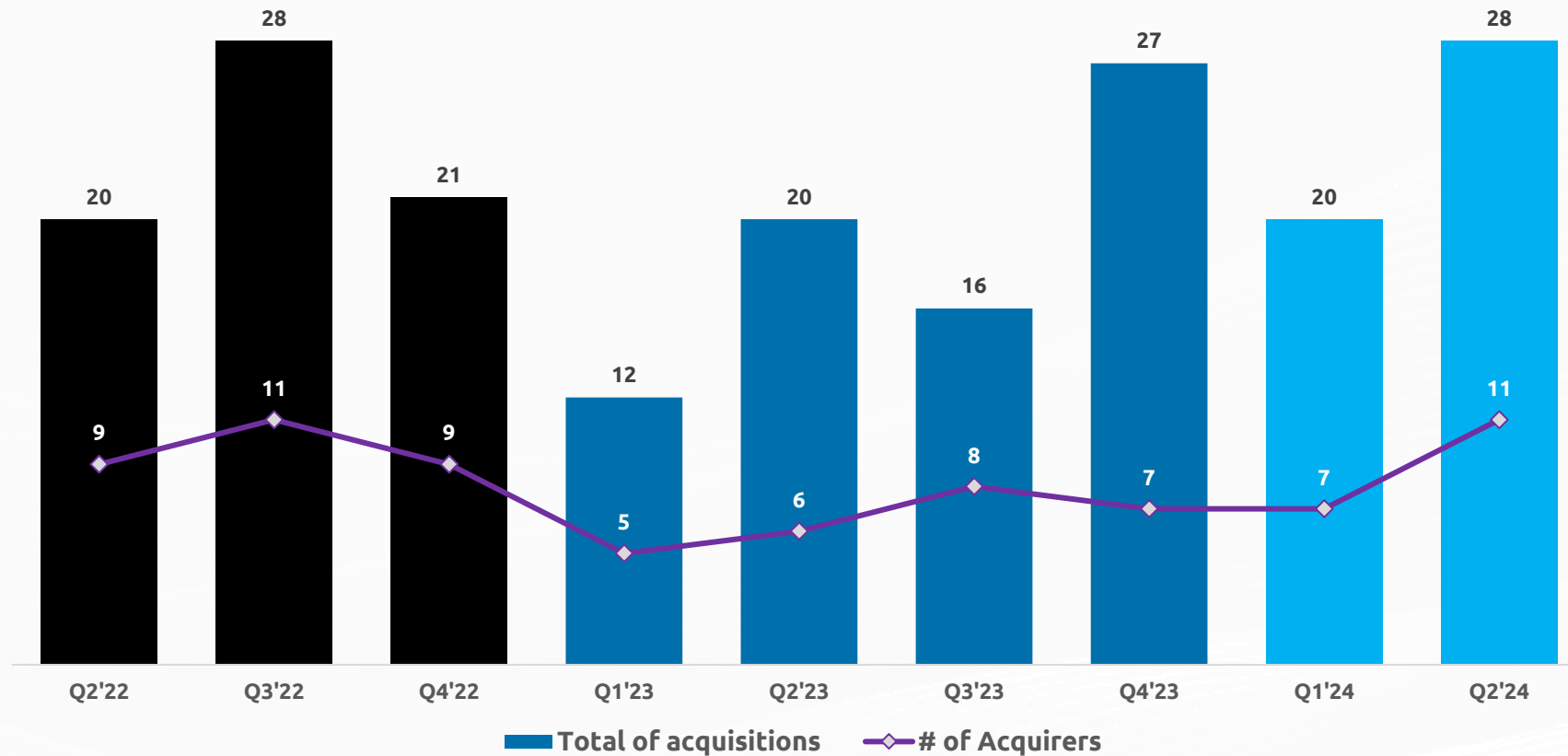
Q2'23 TO Q2'24 YoY Revenue Growth by Industry



BFSI: Banking, Financial Services, & Insurance
Public: Public and Health Sectors
CPRD: Consumer Products, Retail, and Distribution
TMT: Telecommunications, Media, and Technology
MR&U+: Manufacturing, Resourcing & Utilities, and Other

Combined number of acquisition announcements

H1'24, 50% more acquisitions YoY announced, 11 out of the 20 companies covered acquired, a considerable increase versus last quarters.





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