



**中软国际有限公司**

**Chinasoft International Limited**

(Stock Code 股份代号 : 0354.HK)

**2021 Roadshow Material**

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# Agenda

- 1. Company Overview**
- 2. Financial Results**
- 3. Business Transformation and Outlooks**
- 4. Investment Highlights**

# About Chinasoft International



率真存厚 立志有恒  
奋斗为本 成就客户  
创造分享 共同成长

- Chinasoft International is a global IT services, business solutions and cloud services provider partnering with the world's leading clients in their transformational journeys.



Ranks		ITS Vendors	Revenue (Million USD)		Market Share		Growth %	Ranking Among Chinese Peers (2019)	Change in Ranks
2018	2019		2018	2019	2018	2019	2018-2019		
1	1	IBM	47,048	45,151	4.7%	4.3%	-4.0%	-	0
2	2	Accenture	40,718	42,517	4.1%	4.1%	4.4%	-	0
3	3	Deloitte	28,535	31,523	2.9%	3.0%	10.5%	-	0
39	38	China Telecom	5,127	5,321	0.5%	0.5%	3.8%	<b>1</b>	1
68	51	Alibaba	2,499	4,060	0.3%	0.4%	62.4%	<b>2</b>	17
66	58	Huawei	2,517	3,604	0.3%	0.3%	43.2%	<b>3</b>	8
94	94	Sitel	1,510	1,567	0.2%	0.2%	3.8%	-	-3
<b>100</b>	<b>95</b>	<b>Chinasoft International</b>	<b>1,564</b>	<b>1,750</b>	<b>0.2%</b>	<b>0.2%</b>	<b>11.9%</b>	<b>4</b>	<b>11</b>
107	96	China Mobile	1,448	1,723	0.1%	0.2%	19.6%	<b>5</b>	11

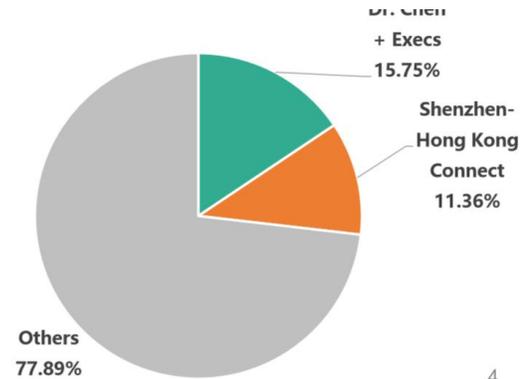
Sources: Gartner , <Market Share: IT Services, 2019>

# Company Overview

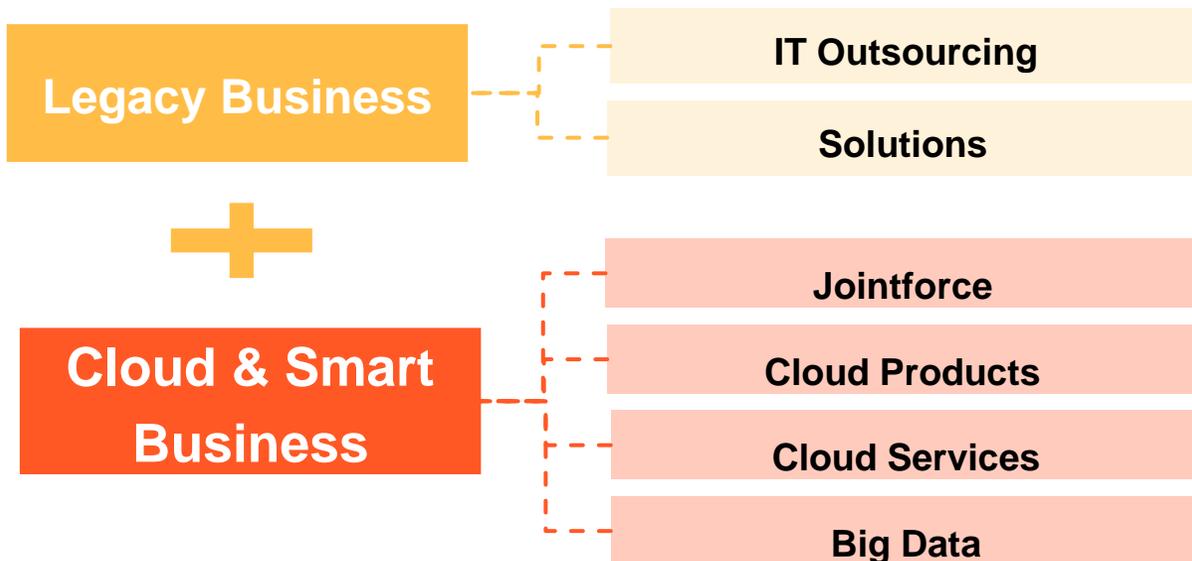
## ◆ Introduction

Established	2000
HK GEM Listing	2003
HK Main Board Listing	2008
Code	354.HK
Revenue in 2019	12 Billion RMB

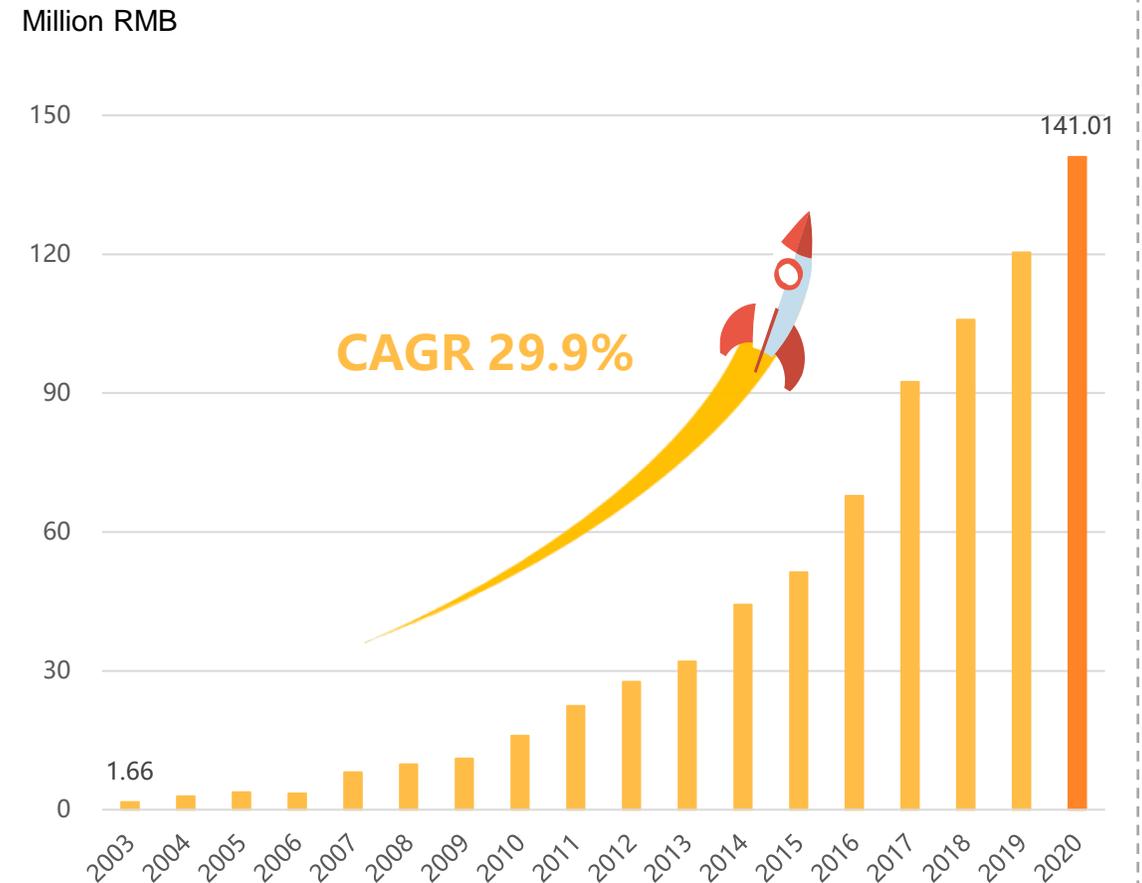
## ◆ Shareholders



## ◆ Business structure



**Sustained high growth (CAGR 29.9%),  
Significantly faster than industry growth (ITS  
expenditure in China CAGR 19%)**



# Broad Blue-Chip Customer Base



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Finance	中国银联 中国银行 中国工商银行 中国建设银行 中国农业银行 招商银行 中国邮政储蓄银行 中国平安 PINGAN 深圳发展银行
	HSBC citibank Bank of America 三井住友銀行 Standard Chartered 城市銀行 太平洋保險 华夏基金 安邦保險
	中国人民保險 阳光保險集團 中国信託 中国人寿 泰康人壽 华泰保險 甜橙金融 MetLife 友邦保險
Telecom	HUAWEI China unicom 中国联通 中国电信 中国移动 SONY 大唐移动 TD Tech ASP 卓望科技 sicap FiberHome
	百度 Tencent 腾讯 阿里巴巴 sina 新浪 高德地图 畅游 JD 京东 Ctrip 携程 快钱
Internet	SF EXPRESS 顺丰速运 网易游戏 inspur 浪潮 mi 小米 翼支付 苏宁易购 GOME 国美在线 TOPWAY 卓维网络 Veewon
	Microsoft ORACLE IBM Panasonic Symantec redhat hp Kingdee 金蝶 SAMSUNG oppo
Hi-tech	中国烟草 CSR 中国南车 招商局集團 DEC 东方电气 SANY Pfizer LIUGONG 柳工 GEELY CHERY 中国中鋼集團公司 TOTO 山鋼集團 GSK 中化集团
	中国東方航空 中国南方航空 海南航空 深圳航空 SHENZHEN 深圳机场 BAIYUNPORT 白云国际机场股份
Manufacturing & Logistics	国家电网 中国石油 中国海油 SINOPEC 中国石化 中国南方电网 中国水电工程集团有限公司 COMTOP NARI 南瑞集团 中国电建 中广核 CGN
Civil Aviation	
Energy	
Government	

- BJ
- XA
- KS
- NJ
- CQ
- QD
- HF
- WX
- XZ.....

# Rich Industry Solution Capabilities



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Industry Solutions	<b>Government</b>	<ul style="list-style-type: none"> <li>■ Audit management</li> <li>■ Social insurance and Benefits</li> <li>■ State-owned Asset Mgmt.</li> </ul>	<ul style="list-style-type: none"> <li>■ Food and Medicine management</li> <li>■ Administrative Management</li> <li>■ Policy Planning System</li> </ul>	<ul style="list-style-type: none"> <li>■ Online Audit Application</li> <li>■ Public Portal</li> <li>■ Cloud Migration &amp; Integration</li> </ul>	General Solutions	<ul style="list-style-type: none"> <li>■ CRM</li> <li>■ OA</li> <li>■ BI</li> <li>■ Portal Group</li> <li>■ RFID</li> <li>■ GIS</li> <li>■ Electronic Ticketing System</li> </ul>
	<b>Manufacture / Logistics</b>	<ul style="list-style-type: none"> <li>■ ERP</li> <li>■ MES</li> <li>■ LES</li> </ul>	<ul style="list-style-type: none"> <li>■ Safety Production Management</li> <li>■ WMS</li> <li>■ EAI</li> </ul>	<ul style="list-style-type: none"> <li>■ Product Code tracking</li> </ul>		
	<b>Finance</b>	<ul style="list-style-type: none"> <li>■ Payment System</li> <li>■ Receivable System</li> <li>■ Credit System</li> <li>■ Bank Card System</li> </ul>	<ul style="list-style-type: none"> <li>■ Credit Card System</li> <li>■ Risk Management System</li> <li>■ Digital Marketing</li> <li>■ Supply Chain Leverage</li> </ul>	<ul style="list-style-type: none"> <li>■ Supply Chain Leverage</li> <li>■ Digital Insurance System</li> <li>■ Insurance Dev. Support</li> <li>■ Reimbursement System</li> </ul>		
	<b>Public Services</b>	<ul style="list-style-type: none"> <li>■ One Card Access</li> <li>■ AFC</li> </ul>	<ul style="list-style-type: none"> <li>■ ACC</li> <li>■ Smart Transportation</li> </ul>	<ul style="list-style-type: none"> <li>■ Airport Operating System</li> </ul>		
	<b>Telecom</b>	<ul style="list-style-type: none"> <li>■ Mobile Payment</li> <li>■ Mobile Instant Communication</li> <li>■ Mobile Community</li> </ul>	<ul style="list-style-type: none"> <li>■ Corporate blog</li> <li>■ Mobile Application Store</li> <li>■ One-Click Dial</li> </ul>	<ul style="list-style-type: none"> <li>■ Embedded Browser</li> <li>■ Mobile Advertisement Platform</li> </ul>		
	<b>Hi-Tech Internet</b>	<ul style="list-style-type: none"> <li>■ Product development</li> <li>■ Software &amp; hardware testing</li> <li>■ Embedded software development</li> </ul>	<ul style="list-style-type: none"> <li>■ Consulting &amp; solution implementation</li> <li>■ E-commerce solutions</li> <li>■ Offshore delivery center</li> </ul>	<ul style="list-style-type: none"> <li>■ Mobile terminal development</li> <li>■ UI design</li> <li>■ Web development solution</li> </ul>		
<b>Core Products</b>	<p><b>Middleware Platform ResourceOne is Based on SOA and Cloud</b></p> <ul style="list-style-type: none"> <li>■ Popular in Government and Manufacturing Verticals – trusted cloud</li> <li>■ Named the Best Government Platform by CCID 5 Years In a Row</li> </ul>		<p><b>TopLink/TSA+Platform</b></p> <ul style="list-style-type: none"> <li>■ Used in Union Pay, Government, and Provinces Centers</li> <li>■ Support Cross Regional Bank Card Online Transaction</li> </ul>		<p><b>Ark Middleware</b></p> <ul style="list-style-type: none"> <li>■ One-stop big data dev. platform</li> </ul>	

# Comprehensive New Tech Capabilities

## AI

**Core Tech:** Bio/image/voice recognition, neural network learning

**Application:** Anti-fraud, intelligent risk control, intelligent voice robot, intelligent marketing, participating in the "Knowledge Map White Paper", JF knowledge map

**Strategic Co-op:** Huawei, BATJ, Turing AI Institute

## Intelligent Manufacturing

**Core Tech:** Digital twins, simulation

**Application :** Cloud MES, Honeycomb

**Strategic Co-op:** Bosch, Forcam, ESI, Haier, JF-Turing AI Institute

## Blockchain

**Application:** Data consensus, transaction traceability, asset securitization, bill circulation, supply chain finance Strategic

**Cooperation:** CCB

## 5G

**Application:** 5G chip development, 5G base station testing, network planning, smartphone OS development and testing, etc.

**Strategic Co-op:** Telecom equipment supplier & operator

## Cloud

**Core Tech:** Cloud backup, DevOps, EI Apps, customized platform development, cloud maintenance

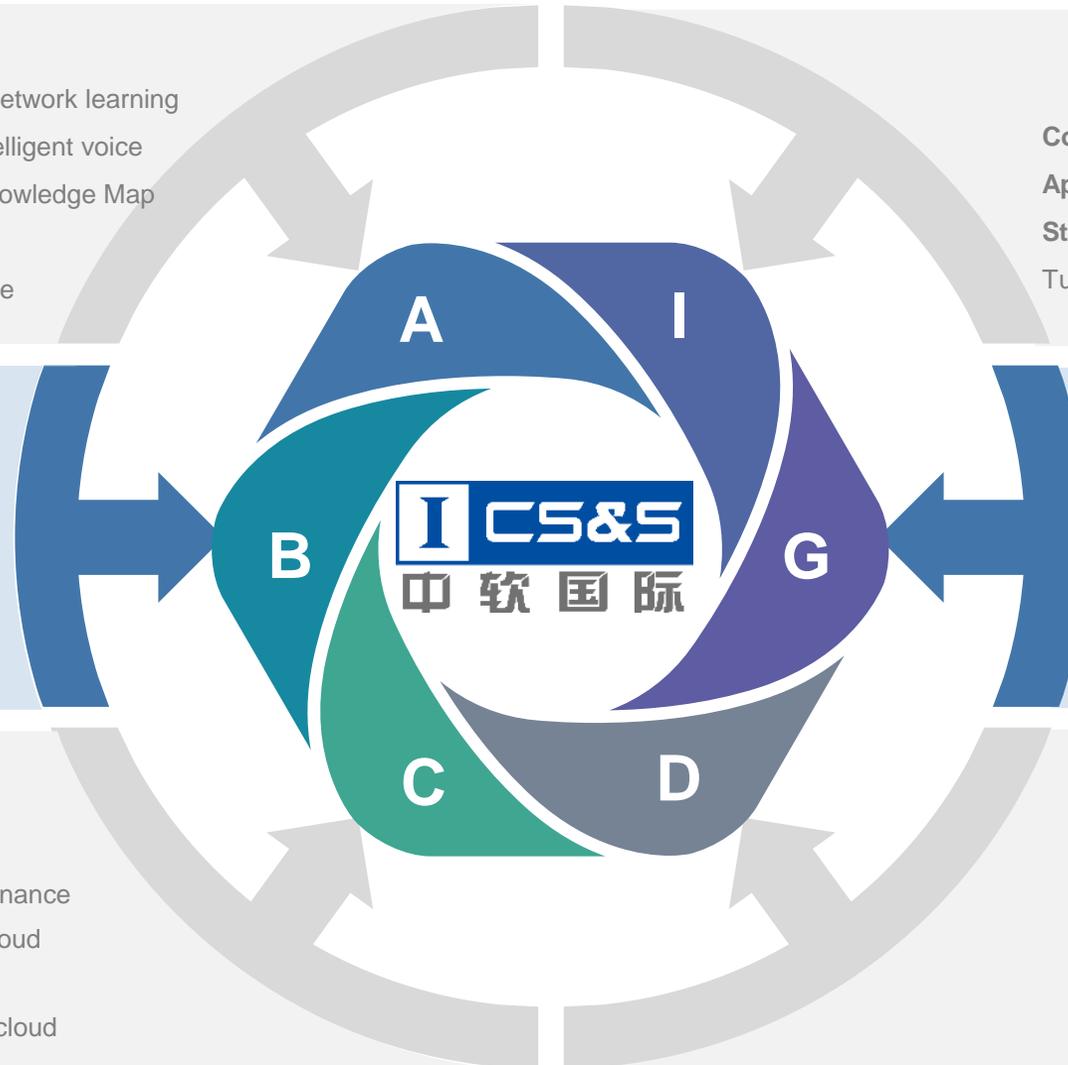
**Application:** JF cloud disk, CloudEasy, BES Cloud Apps development

**Strategic Co-op:** Best MSP partner of Huawei cloud

## Big Data

**Application:** Big data platform, data governance, enterprise risk management, enterprise digital due diligence based on enterprise big data

**Strategic Co-op:** Huawei, BATJ, Guizhou government



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# Financial Results



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RMB 000'	2020	2019	Growth
Revenue	14,101,239	12,041,895	17.1%
<i>Service Revenue</i>	13,762,185	11,636,730	18.3%
Gross Profit	4,118,484	3,583,093	14.9%
Profit for the Year	948,113	756,686	25.3%
Profit for the Year Attributable to Owners of the Company	954,928	754,888	26.5%
Basic EPS (RMB cents)	37.86	30.71	23.3%

# Financial Results Cont.

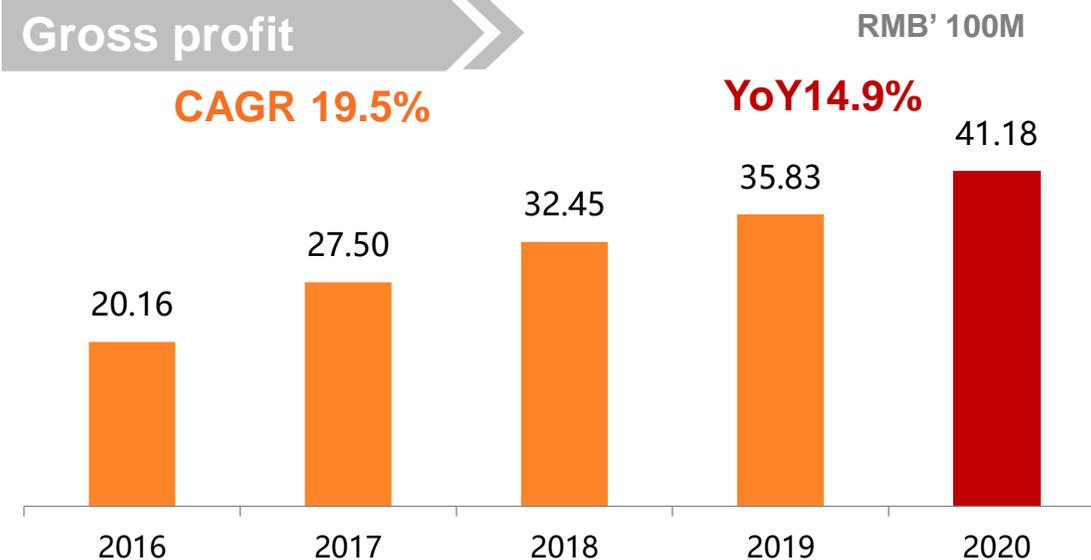


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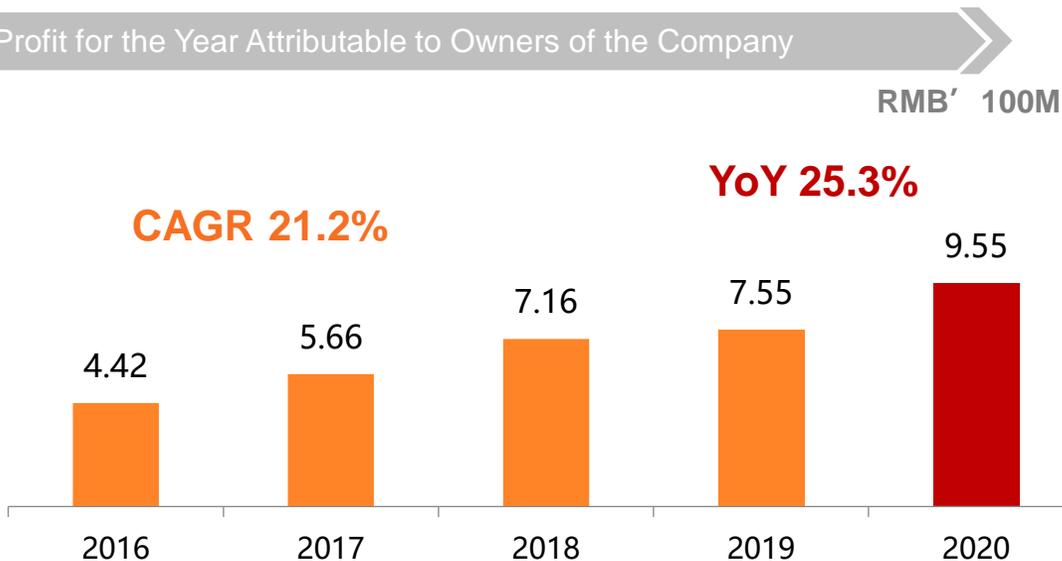
## Revenue



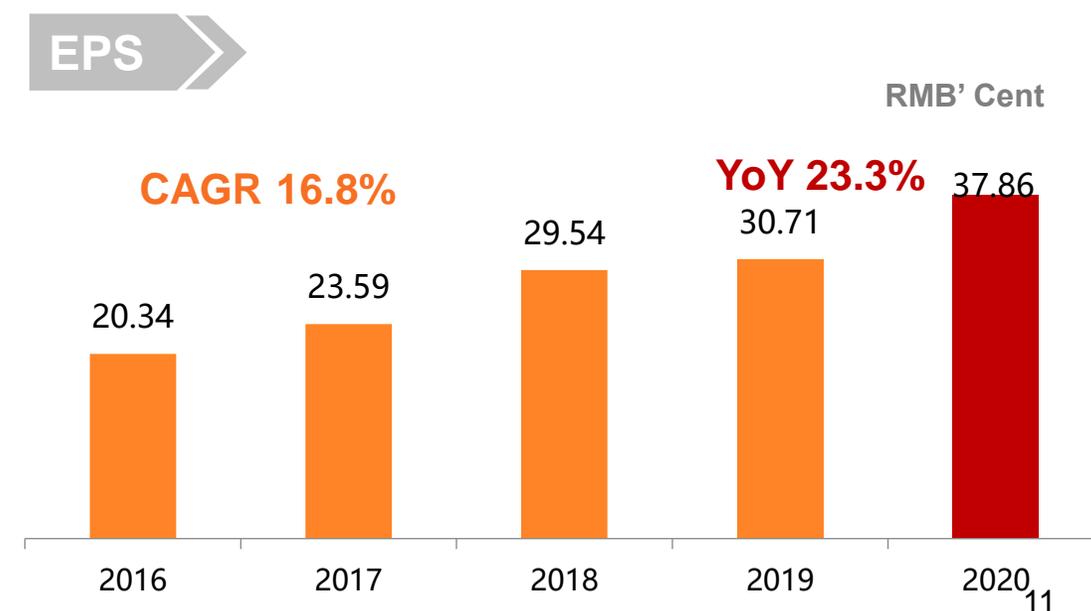
## Gross profit



## Profit for the Year Attributable to Owners of the Company



## EPS



# Income Statement Analysis



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RMB 000'	2020	Of Rev.%	Of Service Rev.%	2019	Of Rev.%	Of Service Rev.%	Growth%
<b>Revenue</b>	<b>14,101,239</b>	N/A	N/A	<b>12,041,895</b>	N/A	N/A	17.1%
<b>Service revenue</b>	<b>13,762,185</b>	N/A	N/A	<b>11,636,730</b>	N/A	N/A	18.3%
Cost of sales	(9,982,755)	(70.8%)	(72.5%)	(8,458,802)	(70.2%)	(72.7%)	18.0%
<b>Gross profit</b>	<b>4,118,484</b>	29.2%	29.9%	<b>3,583,093</b>	29.8%	30.8%	14.9%
Other income	312,821	2.2%	2.3%	177,811	1.5%	1.5%	75.9%
Loss from decognition of financial assets measured at amortised cost	(1,201)	(0.0%)	(0.0%)	(4,544)	(0.0%)	(0.0%)	(73.6%)
Impairment losses under expected credit loss model, net of reversal	(161,384)	(1.1%)	(1.2%)	(74,812)	(0.6%)	(0.6%)	115.7%
Goodwill impairment loss	(21,857)	(0.2%)	(0.2%)	(35,760)	(0.3%)	(0.3%)	(38.9%)
impairment losses of investments accounted for using the equity method	(15,878)	(0.1%)	(0.1%)	-	0.0%	0.0%	N/A
Other gains and losses	(14,902)	(0.1%)	(0.1%)	849	0.0%	0.0%	(1,855.2%)
Selling and distribution costs	(729,409)	(5.2%)	(5.3%)	(617,554)	(5.1%)	(5.3%)	18.1%
Administrative expenses	(1,301,981)	(9.2%)	(9.5%)	(1,195,874)	(9.9%)	(10.3%)	8.9%
R&D costs	(930,169)	(6.6%)	(6.8%)	(808,949)	(6.7%)	(7.0%)	15.0%
Other expenses	(43,786)	(0.3%)	(0.3%)	(58,929)	(0.5%)	(0.5%)	(25.7%)
Finance costs	(151,458)	(1.1%)	(1.1%)	(166,045)	(1.4%)	(1.4%)	(8.8%)
Share of results of investments accounted for using the equity method	(24,435)	(0.2%)	(0.2%)	(328)	(0.0%)	(0.0%)	7,349.7%
Profit before taxation	1,034,845	7.3%	7.5%	798,958	6.6%	6.9%	29.5%
Income tax expense	(86,732)	(0.6%)	(0.6%)	(42,272)	(0.4%)	(0.4%)	105.2%
<b>Profit for the year</b>	<b>948,113</b>	6.7%	6.9%	<b>756,686</b>	6.3%	6.5%	25.3%

# Balance Sheet



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RMB '000	2020	2019
<b>Current assets</b>		
Inventories	51,192	54,421
Trade and other receivables	4,580,163	3,297,240
Bills receivable	15,851	4,443
Contract assets	1,904,185	2,228,494
Amounts due from related companies	39,776	75,126
Pledged deposits	16,134	12,861
Bank balances and cash	3,786,777	2,525,741
	<b>10,394,078</b>	<b>8,198,326</b>
<b>Non-current assets</b>		
Property, plant and equipment	858,028	802,423
Right-of-use assets	333,744	278,646
Intangible assets	144,913	127,382
Goodwill	941,215	973,856
Investments accounted for using the equity method	247,154	227,607
Equity instruments at fair value through other comprehensive income	61,825	62,901
Other receivable	87,455	66,180
Pledged deposit	12,792	-
Deferred tax assets	5,753	8,075
	<b>2,692,879</b>	<b>2,547,070</b>

RMB '000	2020	2019
<b>Current liabilities</b>		
Trade and other payables	1,752,965	1,229,223
Bills payable	33,446	22,051
Lease liabilities	142,318	125,668
Contract liabilities	329,240	138,815
Amounts due to related companies	8,771	3,101
Dividend payable	81	81
Taxation payable	83,372	83,808
Convertible loan notes	-	23,829
Borrowings	368,130	1,523,187
	<b>2,718,323</b>	<b>3,149,763</b>
Net current assets	<b>7,675,755</b>	<b>5,048,563</b>
Total assets less current liabilities	<b>10,368,634</b>	<b>7,595,633</b>
<b>Non-current liabilities</b>		
Deferred tax liabilities	10,896	10,287
Convertible loan notes	-	727,672
Lease liabilities	159,942	123,734
Borrowings	1,421,385	200,000
	<b>1,592,223</b>	<b>1,061,693</b>
	<b>8,776,411</b>	<b>6,533,940</b>
<b>Capital and reserves</b>		
Share capital	131,956	116,325
Share premium	4,734,754	3,145,241
Treasury share	(605,387)	(470,752)
Reserves	4,491,765	3,676,796
Equity attributable to owners of the Company	8,753,088	6,467,610
Non-controlling interests	23,323	66,330
<b>Total equity</b>	<b>8,776,411</b>	<b>6,533,940</b>

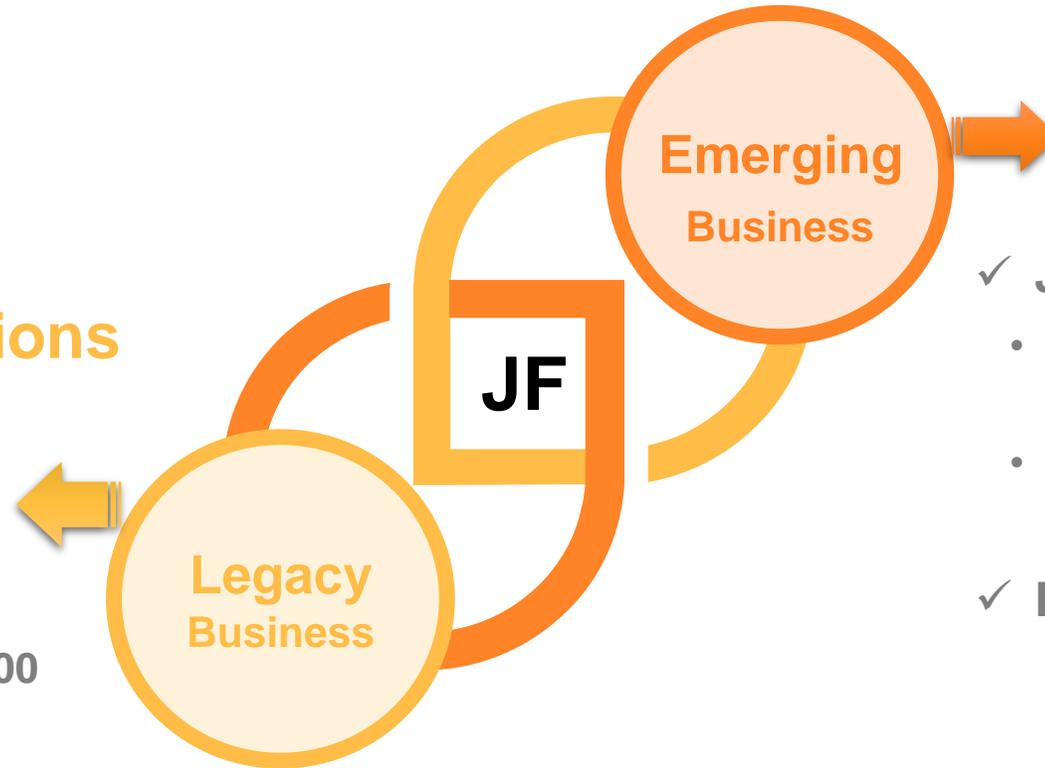
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## IT Outsourcing & Solutions

**CAGR 15% (2019-2023)**

- ✓ 1<sup>st</sup> largest Customer: Huawei
- ✓ 2<sup>nd</sup> largest Customer: HSBC
- ✓ Develop customers with USD 100 million revenue contribution:
  - Ping An, Tencent, Alibaba, Microsoft
  - AIA, Standard Chartered, GE
- ✓ Establish Software Factories

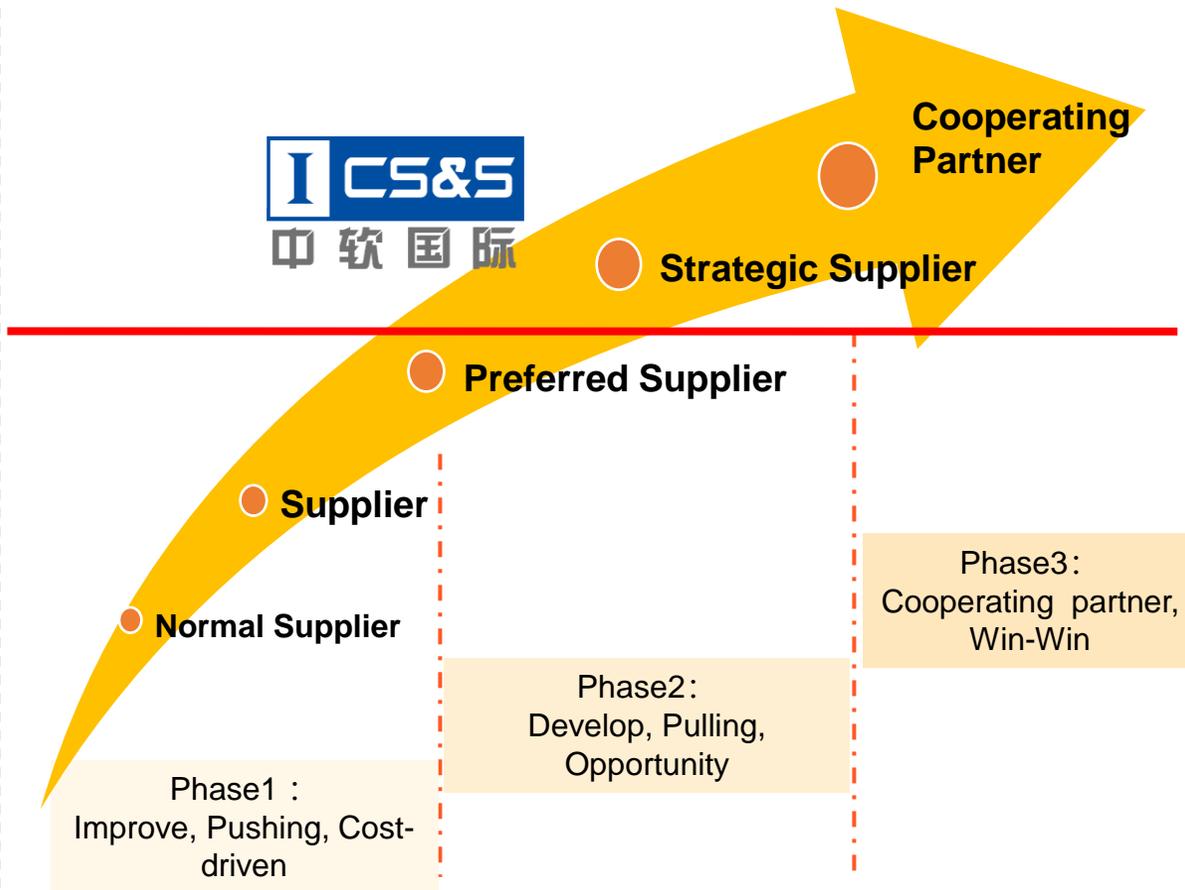


## Cloud Intelligent Services

**CAGR 60% (2019-2023)**

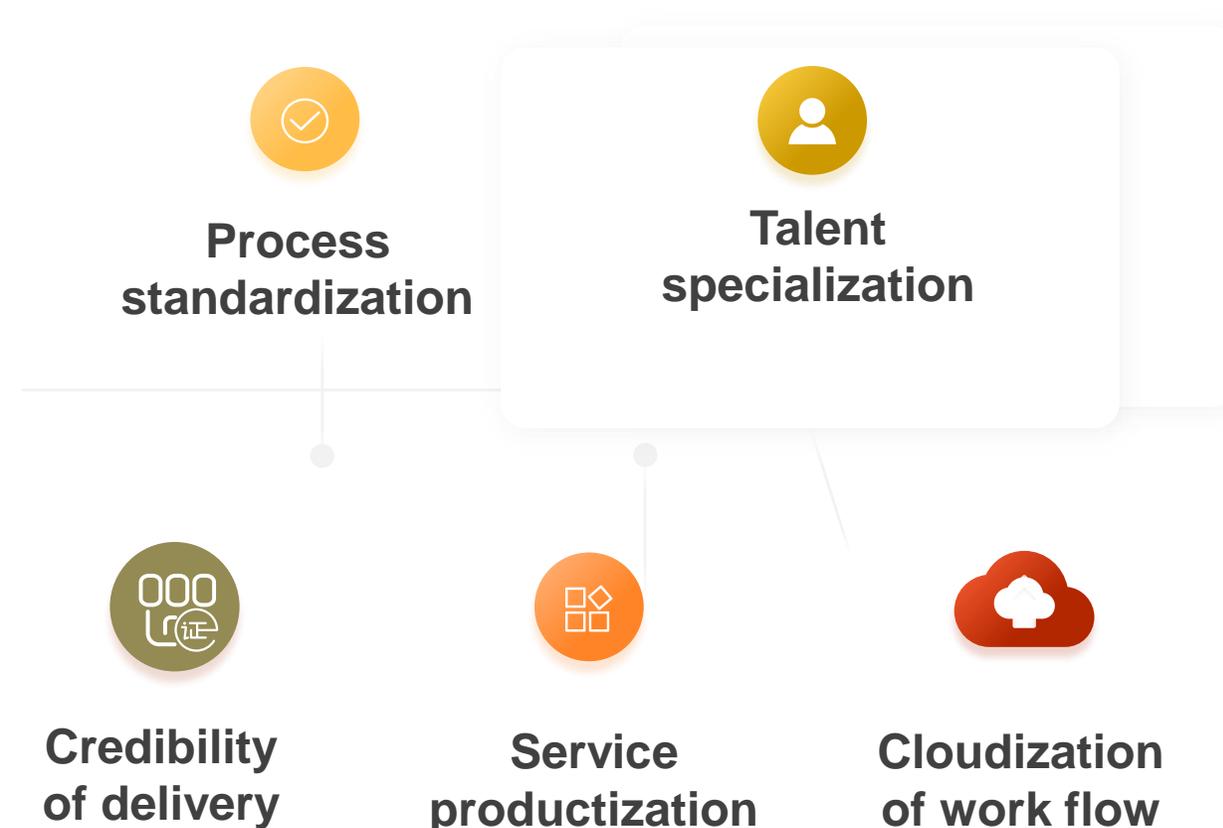
- ✓ **Jointforce Platform:**
  - Plan Z: Expand the middle and long tail market
  - Cloud Integrative Market “Yunji”: Government IT procurement
- ✓ **Full-Stack Cloud Business:**
  - ✓ Cloud Products: SaaS, HM
  - ✓ Cloud Services: Cloud managed services, DaaS

## Supplier Development (SD) Program: Learn from Huawei



## 5P Model: Learn from Infosys





# Cooperation with Huawei in R&D Outsourcing

## No.1 in Market Share:

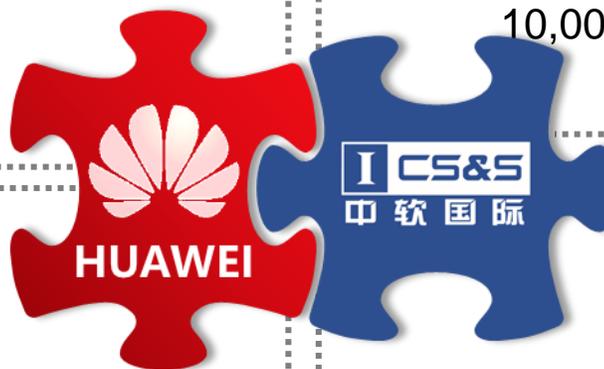
- 50-60% of Huawei's IT outsourcing
- No.1 in the latest recruitment framework
- **1<sup>st</sup> place** in supplier evaluation for 6 consecutive years
- **1<sup>st</sup> place** in delivery performance, the best delivery award in the world

## Covers All LOB:

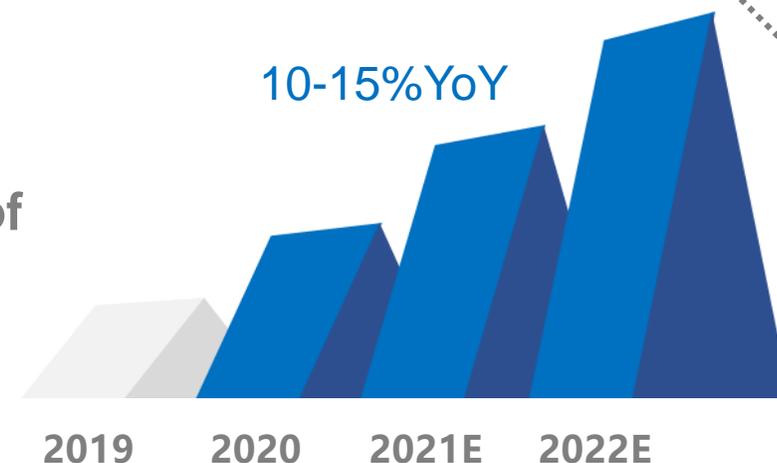
- Consumer (smart car, OS, HMS, terminal cloud service), cloud, technical service, process IT, network, 2012 laboratory, HiSilicon, wireless,

## The Closest Partner:

- 1<sup>st</sup> Mutual Cooperation Partner with Huawei cloud
- 1<sup>st</sup> batch of "Huawei Cloud Kunpeng Partner Program"
- Only supplier praised by President Guo Ping among 10,000 suppliers



## Revenue Forecast of Huawei's Business



# Ping An's Business: Rapid Growth

## Strong Demand:

- Advancing its "finance + technology" strategy
- AI Bank, Open Bank, data platform business project.

## New Opportunities:

- AI, smart cities, smart medical, smart hospital management system project.

## Excellent Performance:

- 1st place in supplier evaluation



## Centralized Supplier Management:

- The market share of head supplier is growing

## Experiences from HSBC:

- Competitive advantages in digital transformation business delivery capabilities

## Advantages of Jointforce:

National implementation capacity

# BAT: Deepening Cooperation



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## Strong Demand

*More R&D Investment*



## Growing Market Share

*Centralized Supplier Management*



## 2021 Target

**Tencent 腾讯**

- **Growth point:** 1) Gaming and WeChat Business Group 2) Tencent Cloud and PCG business, including Video, Sports, News, etc.

- **Market share rankings:** No.2
- Extend the testing capabilities of the game business to the full-service line.



**YoY 40-50%**

**Alibaba Group 阿里巴巴集团**

- **Growth point:** Ali Cloud, E-commerce, Post-Investment, Ant Financial Services, Rookie Logistics, AI , etc.

- **Market share rankings:** No.3
- Increase recruitment management to ensure stable supply of personnel and CRM.



**YoY 40-50%**

**Baidu 百度**

- **Growth point:** Baidu Cloud, co-construction of autonomous driving ecology, Finance, application of AI technology in core application scenarios.

- **Market share rankings:** No.2
- Build deeper partnerships.
- Gain customer trust.
- Demonstrate capabilities.



**YoY 50-60%**

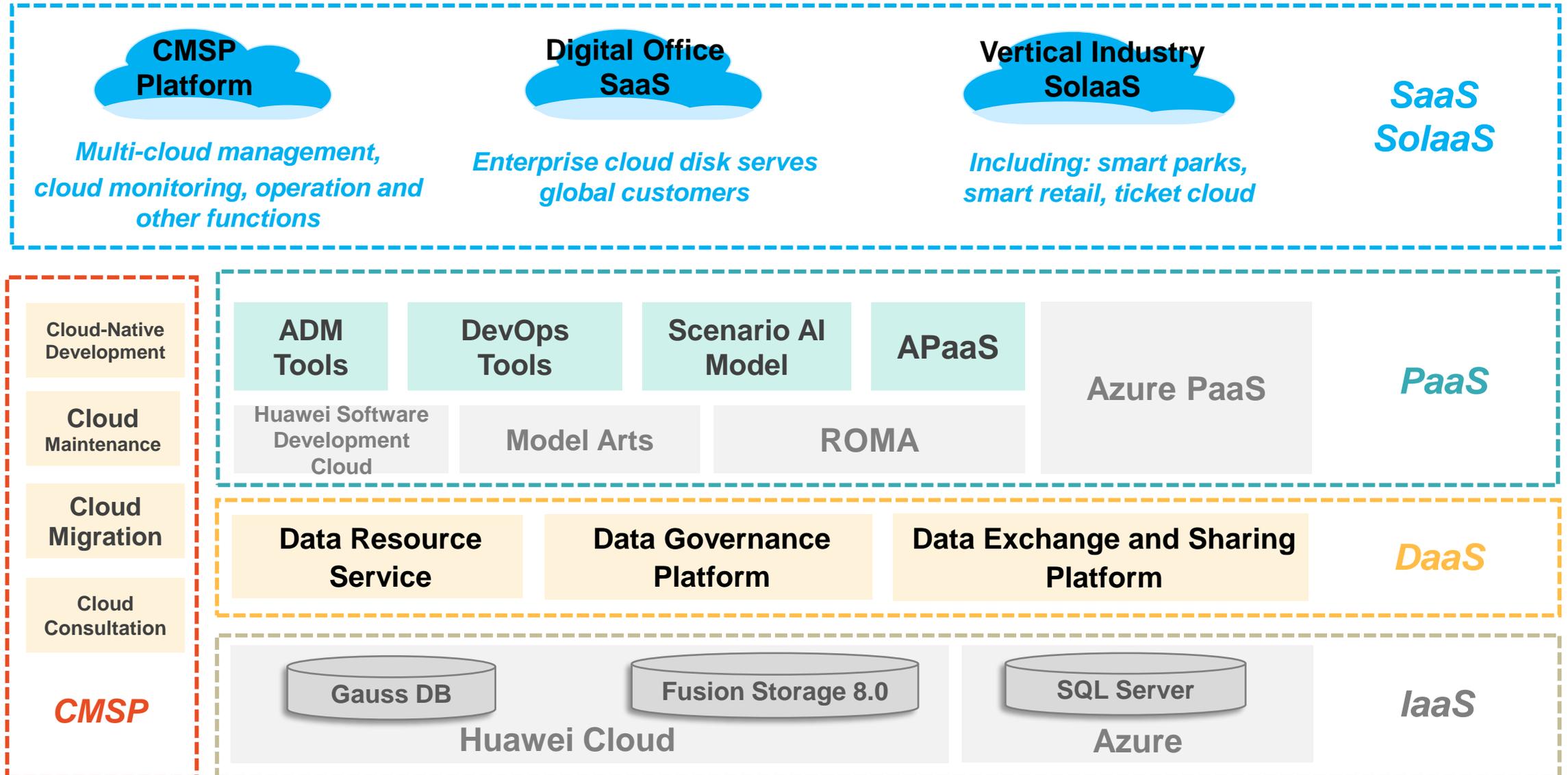
# MNC: Develop International Customers



# Full-Stack Cloud Capabilities – Services + Products



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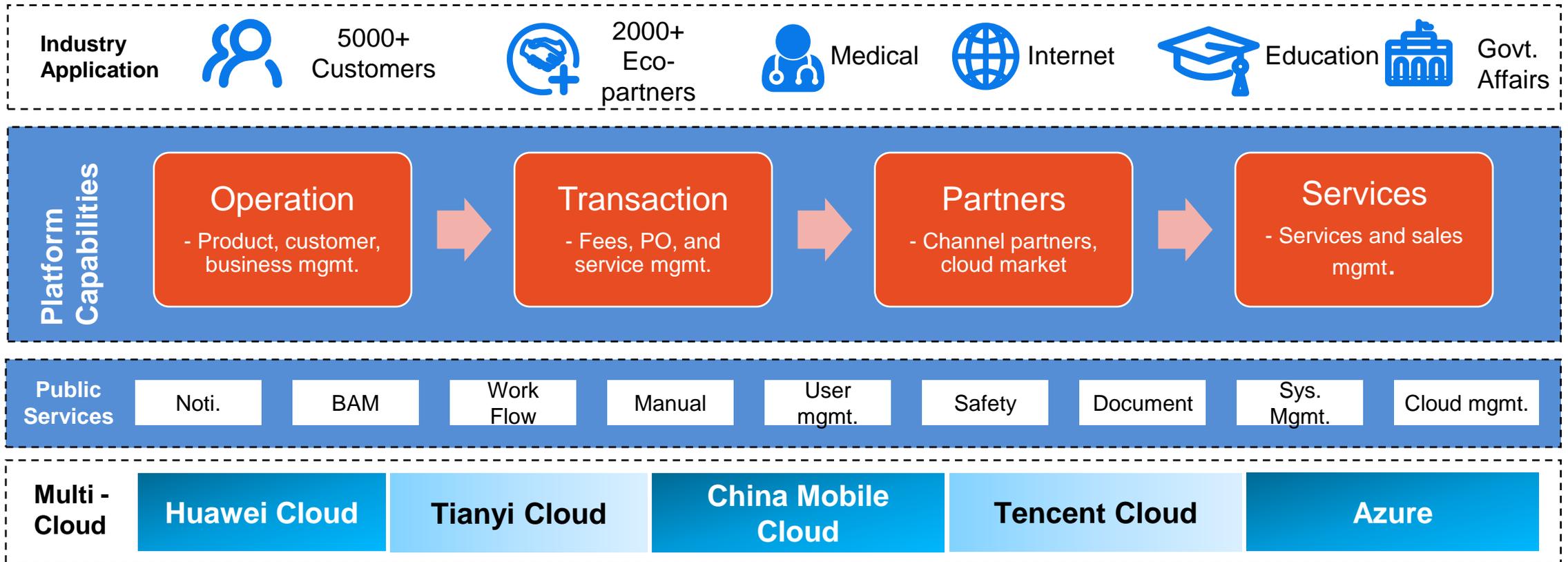


# Huaxia Cloud: One Stop Shop “Cloud Broker”



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- Relying on the advantages of cloud industry resource integration and a complete cloud service value chain, Chinasoft International has in-depth cooperation with many cloud vendors to provide customers with XaaS cloud product portfolio solutions and one-stop purchase and management of value-added services, effectively assisting customers in their digital transformation.



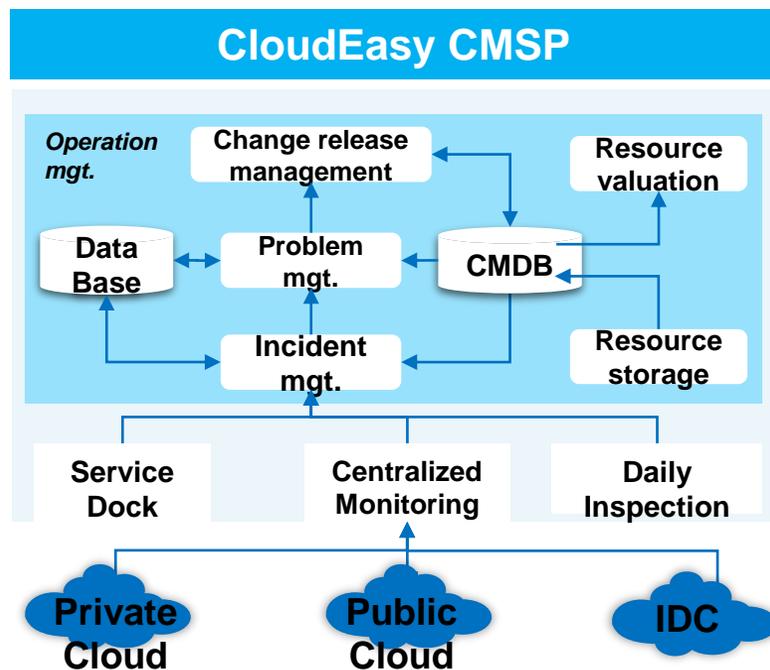
# SaaS: Rapid Breakthroughs in Product Capabilities



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## CloudEasy Cloud Management Service Platform (CMSP)

- ✓ Integrated operation of resources between clouds
- ✓ High-speed migration and replication of business systems
- ✓ Calmly responds to business surges and data security



## Smart Parks 7+1

- ✓ 7+1: Security, transport, asset mgt., infrastructure mgt., energy efficiency mgt., environment mgt., smart conference + smart operating center
- ✓ More than 80 eco-partners developing apps.



## Digital Office

- ✓ Use data asset management to promote the digital transformation of enterprises



The block contains logos and testimonials for four partners: ICBC (Asia) 工银亚洲, 中国地质大学 CHINA UNIVERSITY OF GEOSCIENCES, 东风 HONDA, and vanke 万科. Each partner has a short testimonial about their experience with the platform.

# CMS: TOP 3 in China

- The Group built a one-stop end-to-end service system from cloud migration, cloud implementation, cloud development, to cloud management; continued to deepen the “sail on the same boat” partnership with Huawei; became first-tier distributors of Huawei Cloud in 13 provinces and cities; achieved a 10x increase in the sales performance of Huawei Cloud's long-tail customers; and ranked first in Huawei Cloud's overall ecological channel.

## Cloud Consultation

## Migration

## Maintenance

## Cloud-Native Dev.

## IDC: CMS Market Share 2019



Top 1



Top 2



Top 3 CSI



Source: IDC China, 2020

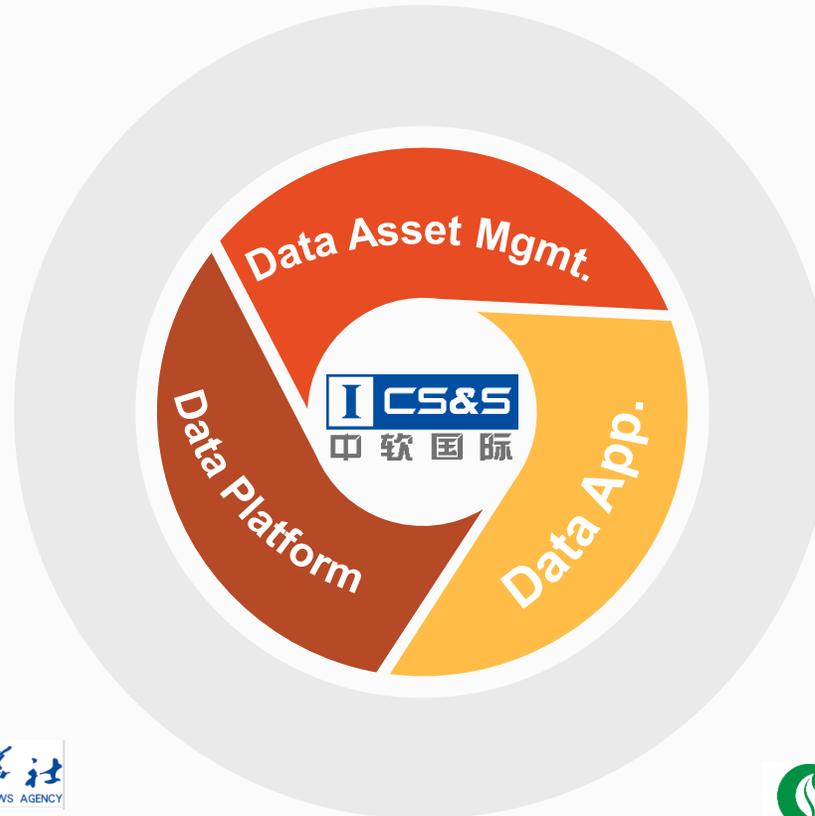
# DaaS: Mature Platform Capabilities

- The Group's big data business provides end-to-end data engineering services and products for large and medium-sized enterprises and public institutions at home and abroad. Its services range from consulting and evaluation, implementation and development, data asset management, and value operation. The Group has won iconic projects in industries such as finance, transportation, manufacturing and circulation, government affairs, and real estate. It has outstanding capabilities in data governance, data platform construction, and data applications, and has an industry leading edge.

## Finance



## Public Services



## Transportation

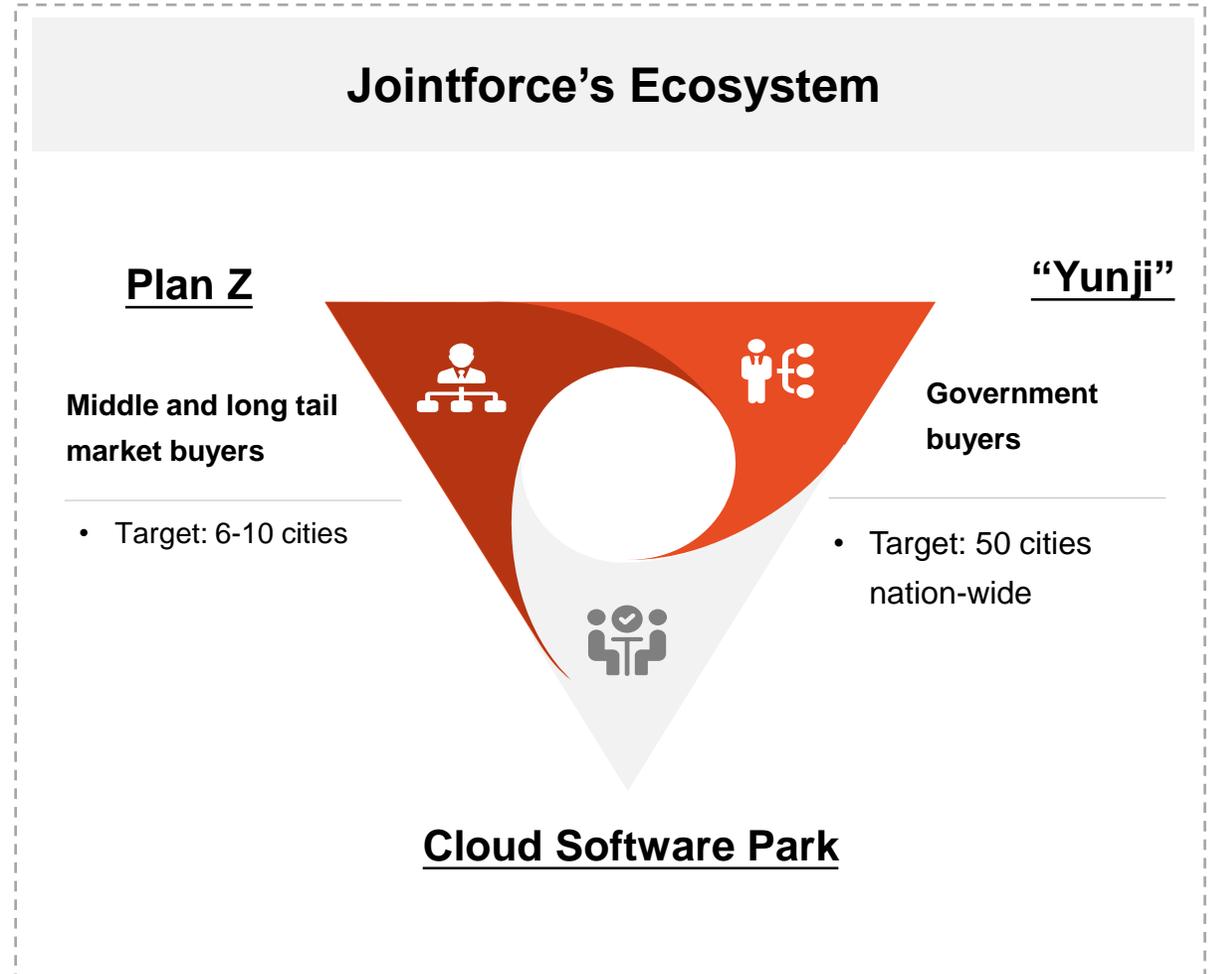
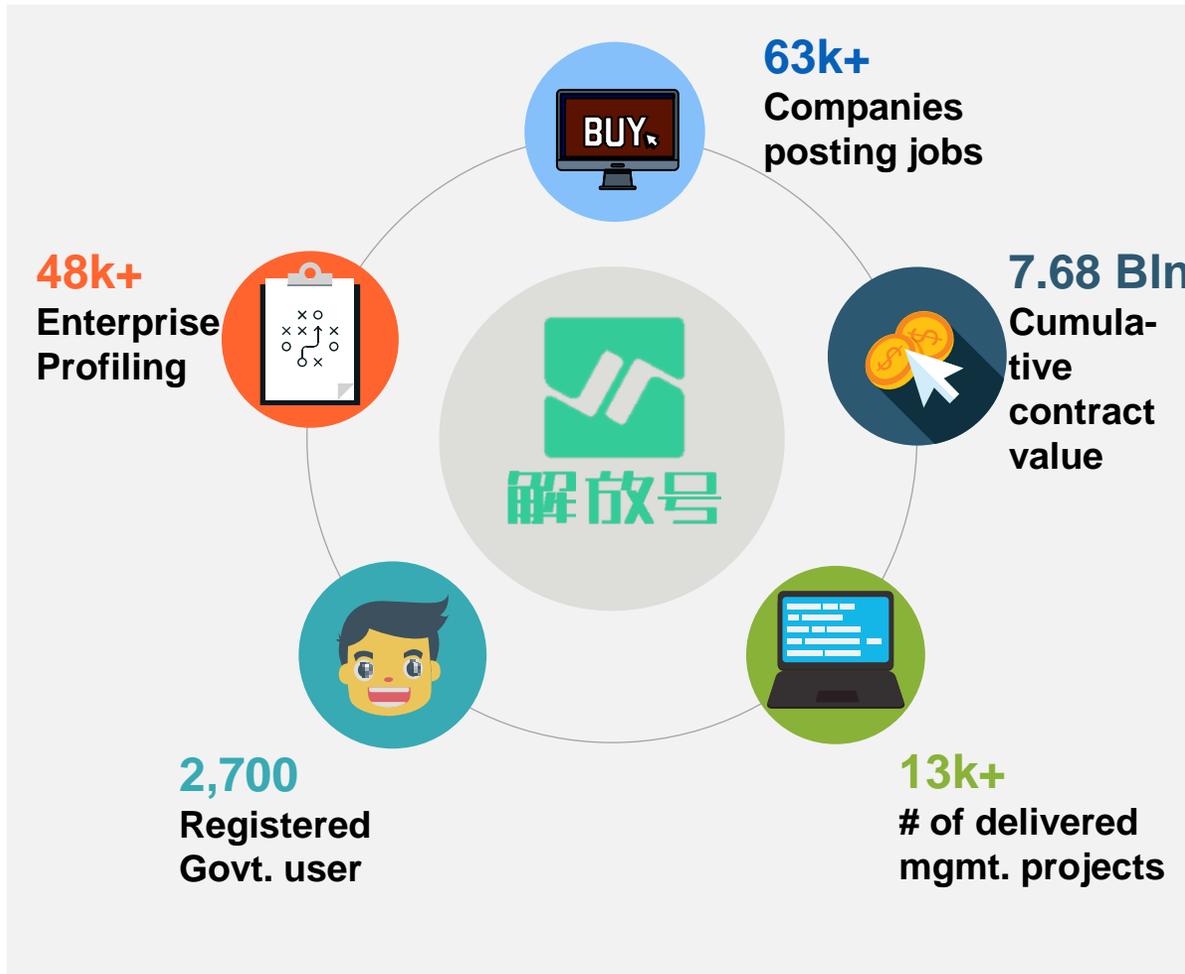


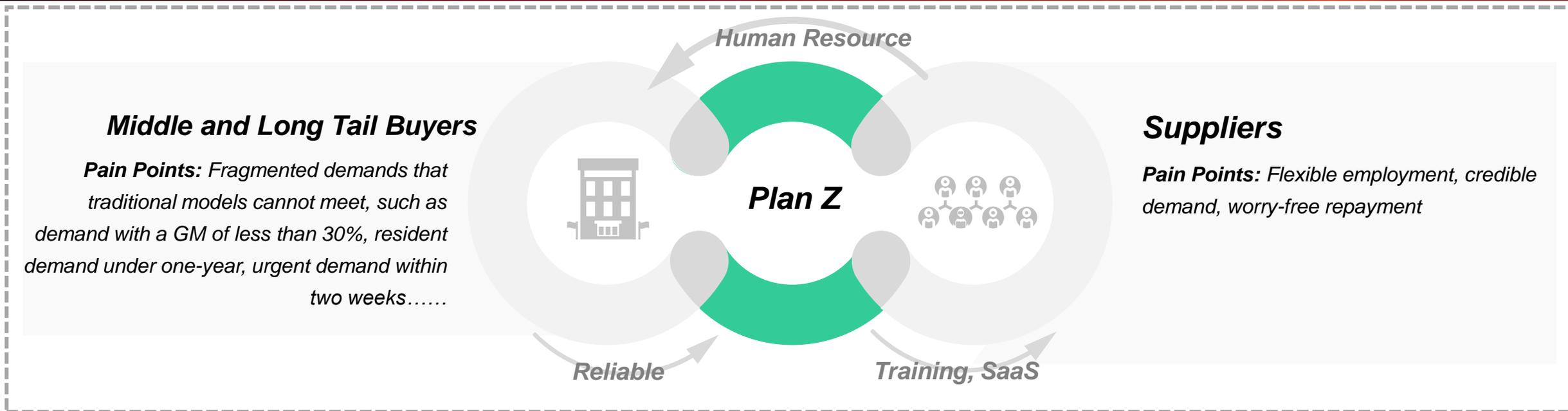
## Tech., Mfg., Logistics



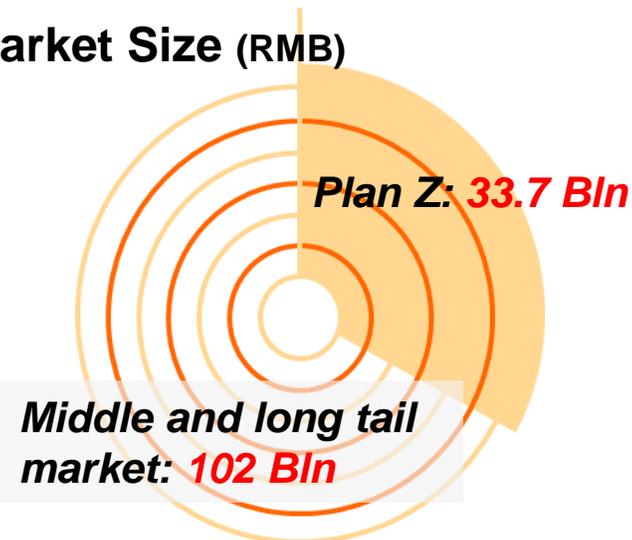
# Jointforce Expands Ecosystem

- Jointforce is the leading platform focused on software customization. Through its professional online delivery mechanism and cloud software management platform, its vision is to become the accelerator for China's smart society.





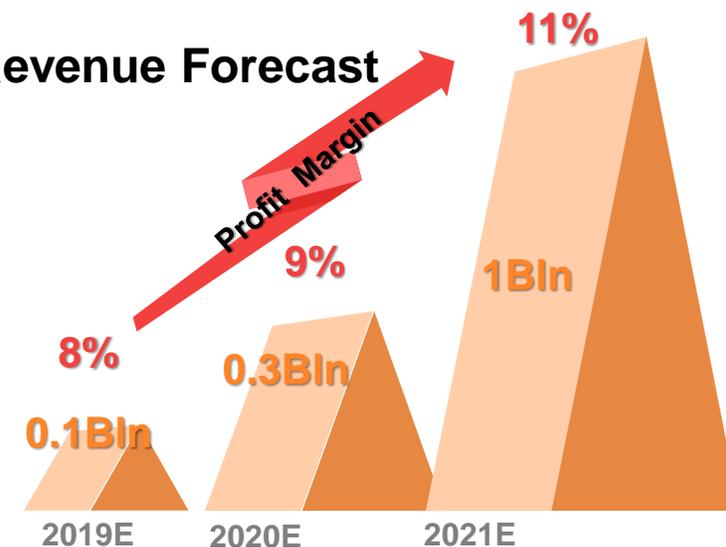
## Market Size (RMB)



## Operation

- **Platform:** Over 400k resumes submitted
- **Suppliers:** Over 1000
- **Over 65%** satisfaction rate, servicing over 150+ buyers

## Revenue Forecast



# Jointforce: Cloud Integrative Market (“Yunji”)



率真存厚 立志有恒  
奋斗为本 成就客户  
创造分享 共同成长



## Market Size (RMB)

**Total Government IT procurement:**  
399.5 billion yuan

**Data Services:** 21.8 billion yuan

**Operation Services:** 13.8 billion yuan

**IT Management:** 11.9 billion yuan

**IT Consultation:** 9.6 billion yuan

## Operation



**700+** government clients, GMV **1.5bln**, servicing project: **2800**



**30%** reduction in government procurement cycle  
**4%** budget savings



High satisfaction score (**4.77/5**)

## Expansion Plan



# Participant of the Xinchuang Industry Movement



率真存厚 立志有恒  
奋斗为本 成就客户  
创造分享 共同成长

- The Group is the first of "Huawei Kunpeng Cloud's Partner". It participated in building the Kunpeng ecosystem and its promotion of the Xinchuang industry movement. The Xinchuang industry is the foundation of data security and network security, and an important part of the "new infrastructure". It will become one of the most important drivers of economic development.

## One-stop Kunpeng cloud services

- The Group signed the first Huawei Kunpeng Cloud Migration Framework Agreement.
- Huawei Kunpeng Expert Migration Service covers more than 30 industry scenarios.

## Joint Solutions

- The Group and Huawei jointly released the Rail Transit Ticketing Cloud based on the Kunpeng to achieve Kunpeng compatibility test certification for multiple solutions.



## Joint Laboratories

- The Group cooperated with Huawei in Chongqing Kunpeng Computing Industry Ecological Operation Center, built the Kunpeng laboratory, application system Kunpeng conversion platform, etc.

## Operations and Training

- The Group developed the Kunpeng curriculum with well-known universities to build the Kunpeng education ecosystem.

# Agenda

1. Company Overview
2. Financial Results
3. Business Transformation and Outlooks
4. Investment Highlights

## Leading IT service provider in China with high growth speed and low PE

✓ Software and IT industry maintained high growths with good prospective

✓ Comprehensive IT service capability, in-depth industry experience and broad blue-chip customer base

✓ Strategic cooperation partnership with Huawei, Microsoft, HSBC, Alibaba, Tencent etc.

✓ Actively implementing digital transformation in new businesses like cloud, big data and Jointforce

**Becoming a world leading IT service company with tremendous potential and innovation capability**

谢谢

Thanks

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