

E-Commerce - Deal Multiples (Select Transactions)

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Abstracts

Executive summary

Reevolv brings you the E-Commerce Deal Multiples Report. A first of its kind where each data point is backed up by Company filings and not based on market rumors. A few excerpts from the report are as below:

Every private equity investor hopes that the multiple for his business will expand. Simply put, the exit multiple will be more than entry multiple. A leading portal XXXX has accomplished just that. In 2007 when the first PE happened, the business was valued at 2.5x revenues. At that time the revenues were under Rs 10 crores. In 2012, the company crossed the 50 crores revenue mark. And guess what, the multiple it got for its next round was 5.3x revenues. The earlier example may not necessarily sound exciting.

Especially if we take example of another portal YYYY where the Pre Money Valuation jumped 24 times in 18 months. However it is not always that things are rosy. Investors in one of the leading portals, ZZZZ have got a valuation jump of only 2x in 5 years despite revenues growing 6 times in the same time frame. The bottom line is that the devil is always in the detail. A lot of times e-commerce space is labelled as a binary investment where you make either a 100x or write off the entire investment. Examples like above show that it's not always necessarily the case. Similarly, when a company having a bouquet of websites, was not happy with the way things were going, they demerged a segment and raised money at a revenue multiple of 5.8 x revenues. Thus it has salvaged some value.

Key highlights

Player profile – Overview of the investee company, Geographic spread

Shareholding Pattern – Shareholding Pattern: Instrument, Break up of instrument, Percentage holding

Historical Financials – Profit & Loss Account, Balance Sheet, Key Ratios

Valuations – Investor, Instruments used, Amount Invested, Percentage stake acquired

Deal Multiples – EV/Sales, EV/EBITDA, P/E

Players covered – Book my show, Deals and you, First Cry, Flipkart, Matrimony, Myntra , Naaptol, Snapdeal, Sulekha, Via

Investors – E-18 Limited, Accel India, Oliver Jung, Mayfield Fund, Norwest Venture Partners, Nokia Growth Partners, Intel Capital, SAIF Partners, IDG Ventures, Accel Partners, Tiger Global, Yahoo!, Canaan Partners, Mayfield Funds, Draper Investment Company , The Hartenbaum Revocable Trust, Canaan Partners, Mayfield Funds, Bertelsmann SE & Co.KGaA, Norwest Venture Partners, Mitsui Global Investment, IndoUS Venture Partners / Kaalari Capital, Sequoia Capital

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