

CACI : At A Glance

January 2017

EVER VIGILANT

Company Overview

CACI provides information solutions and services in support of national security missions and government transformation for Intelligence, Defense, and Federal Civilian customers. A Fortune magazine World's Most Admired Company in the IT Services industry, CACI is a member of the Fortune 1000 Largest Companies, the Russell 2000 Index, and the S&P SmallCap600 Index. CACI provides dynamic careers for approximately 20,000 employees worldwide. Visit www.caci.com.

Investment Features

- Capturing market share by winning new business in our addressable market
- Consistently strong operating cash flow
- Over the long-term, expect to:
 - Grow revenue 1-4% above our addressable market annually on average
 - Expand EBITDA margin 10-30 basis points annually on average
 - Maintain cash conversion well above 100% of net income

Key Elements of Our Growth Strategy

- Win new business in our large addressable market
- Drive operational excellence
- Invest our capital for growth

Recent Developments

- Contract awards of \$1.9 billion in the first quarter of FY17 and \$5.4 billion on a trailing twelve month basis, 1.35x revenue for the same period
- Total backlog of \$11.5 billion as of the first quarter of FY17, up 8.5% compared to the same quarter last year
- Trailing twelve month operating cash flow over 150% of net income during the same period
- **Pipeline as of 9/30/16 remains strong:**
 - \$10.2 billion in bids submitted with 80% for new business to CACI
 - \$16.8 billion in bids expected to be submitted by March 2017 with 84% for new business to CACI

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Market Data:

Stock Exchange NYSE
Market Symbol CACI
Public Since 1968
Fully Diluted Shares
Outstanding 24.9M
Fiscal Year End June 30
Inside Ownership (9/30/16) .. ~8.0%
Institutional Ownership 95+%
(9/30/16)
52-Week Range \$133.60-\$78.08
(1/3/17)
Market Cap (1/3/17) ~\$3.1B

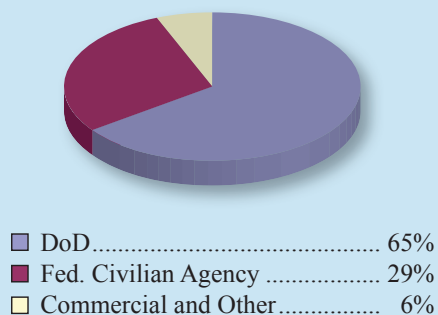
Analyst Coverage:

- **Citi Research**
(415) 951-1772
- **Cowen and Company**
(617) 946-3942
- **Credit Suisse**
(212) 538-1895
- **Drexel Hamilton**
(615) 447-3207
- **Friedman, Billings, Ramsey & Co.**
(703) 312-1878
- **Jefferies & Company**
(212) 284-3452
- **The Maxim Group**
(212) 895-3578
- **Noble Financial**
(314) 687-1074
- **Raymond James**
(727) 567-2287
- **Stifel, Nicolaus**
(443) 224-1325
- **SunTrust Robinson Humphrey**
(615) 748-5681
- **Wells Fargo**
(443) 263-6524

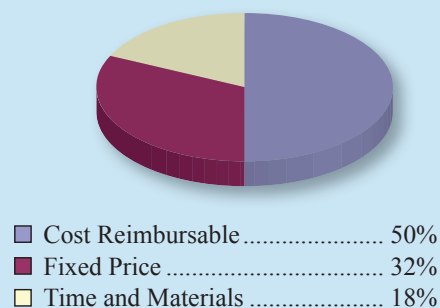
Financial Summary (\$ in thousands, except per share data)

Selected Financial Data	3 Months Ended		Fiscal Year Ended June 30	
	2017	2016	2015	2014
Summary of Operations				
Revenue	\$ 1,073,280	\$ 3,744,053	\$ 3,313,452	\$ 3,564,562
Operating income	\$ 69,658	\$ 264,750	\$ 236,381	\$ 257,403
Net income attributable to CACI	\$ 36,663	\$ 142,799	\$ 126,195	\$ 135,316
Per Share Amounts				
Basic earnings per share	\$ 1.51	\$ 5.89	\$ 5.27	\$ 5.78
Diluted earnings per share	\$ 1.47	\$ 5.76	\$ 5.17	\$ 5.38
Wtd-avg diluted shares outstanding	24,928	24,802	24,388	25,155
Period-End Financial Position				
Cash and equivalents	\$ 49,668	\$ 49,082	\$ 35,364	\$ 64,461
Total assets	\$ 3,912,209	\$ 3,987,341	\$ 3,257,116	\$ 3,359,138
Notes payable and long-term debt	\$ 1,398,681	\$ 1,456,044	\$ 1,068,300	\$ 1,280,291
Shareholders' equity	\$ 1,645,121	\$ 1,607,313	\$ 1,480,272	\$ 1,359,166
Net working capital	\$ 358,596	\$ 356,662	\$ 276,779	\$ 313,262
Financial Ratios				
Gross profit margin	32.1%	33.6%	33.8%	31.9%
Operating margin	6.5%	7.1%	7.1%	7.2%
Net margin	3.4%	3.8%	3.8%	3.8%
Current ratio	1.71 to 1	1.62 to 1	1.69 to 1	1.74 to 1
Notes payable and long-term debt as a percentage of total capital	46.0%	47.5%	41.9%	48.5%
Other Financial Information				
EBITDA	\$ 88,239	\$ 330,365	\$ 303,237	\$ 323,622
Depreciation and amortization	\$ 18,063	\$ 64,652	\$ 66,083	\$ 65,181
Stock-based compensation expense	—	\$ 17,919	\$ 14,072	\$ 11,557
Operating cash flow	\$ 57,777	\$ 242,577	\$ 223,215	\$ 198,643
Capital expenditures	\$ (11,235)	\$ (20,835)	\$ 17,444	\$ (15,279)
Days sales outstanding	59	62	62	63
Total Backlog	\$ 11,500,000	\$ 11,000,000	\$ 9,572,000	\$ 7,089,000
Funded backlog	\$ 2,400,000	\$ 2,300,000	\$ 2,047,000	\$ 1,579,000
Other Non-financial Information				
Contract Awards	\$ 1,892,000	\$ 5,333,000	\$ 3,945,000	\$ 3,440,000
Contract funding orders	\$ 1,162,900	\$ 4,126,200	\$ 3,610,314	\$ 3,415,626
Book-to-bill ratio**	1.08	1.10	1.09	0.96
** Defined as contract funding orders to revenue				
Organic Growth (TTM)	-1.3%	-0.8%	-11.2%	-5.7%
Contract mix (rounded as % of revenue)				
Cost reimbursable	50%	48%	49%	48%
Fixed price	32%	33%	31%	28%
Time and materials	18%	19%	20%	24%
Number of employees	~20,000	~20,000	~15,300	~14,900

**Revenue by Customer,
3 Months FY17**



**Revenue by Contract Type,
3 Months FY17**



For more detail, please see our Financial and Operating Database on the Investor Relations page at www.caci.com.