

HELLO!

Sify Technologies | Non Deal Roadshow
February 2023



01

**Past
performance**

Business
performance to date

02

**Untapped
potential**

India
market

03

**Our
business**

Assets on the
ground & the
drawing board



01

Past performance

Our 5 year track record

Financial metrics – Last 5 years

	REVENUE	EBITDA	PAT	CAPEX
5 YEAR CAGR	7%	21%	8%	96%
IN ABSOLUTE NO.	USD 356 Mil	USD 80 Mil	USD 17 Mil	USD 97 Mil

In \$ MN in constant currency 1 USD @ INR 75.81 (March 31, 2022) (Audited)

Financial metrics – Q3 & 9 MONTHS ENDED

REVENUE

**USD
107 Mil**

EBITDA

**USD
20 Mil**

PAT

**USD
3 Mil**

CAPEX

**USD
51 Mil**

IN
ABSOLUTE
NO.

**USD
297 Mil**

**USD
57 Mil**

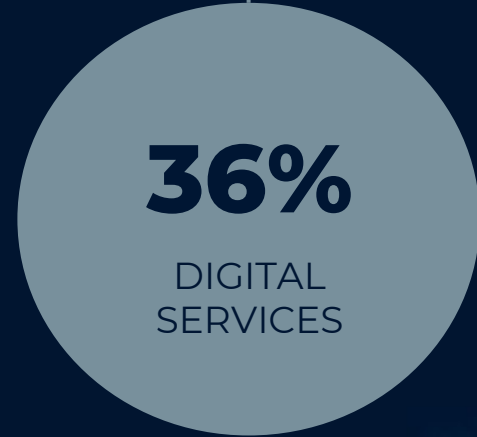
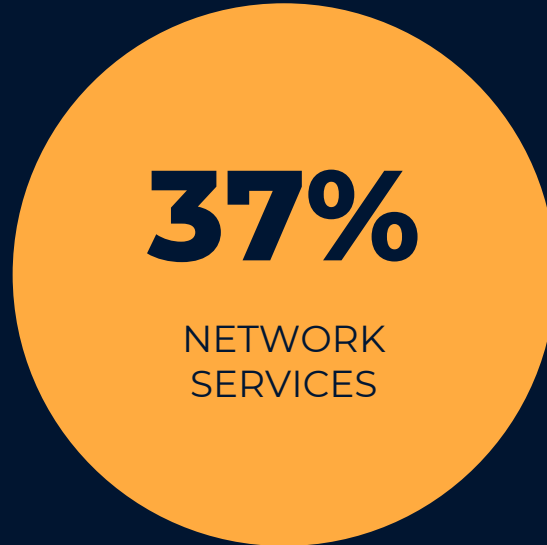
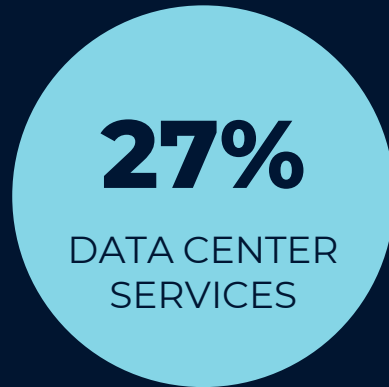
**USD
8 Mil**

**USD
105 Mil**

In \$ MN in constant currency 1 USD @ INR **82.7862** (December 31, 2022) (Unaudited)

Revenue share

3 business in %





02

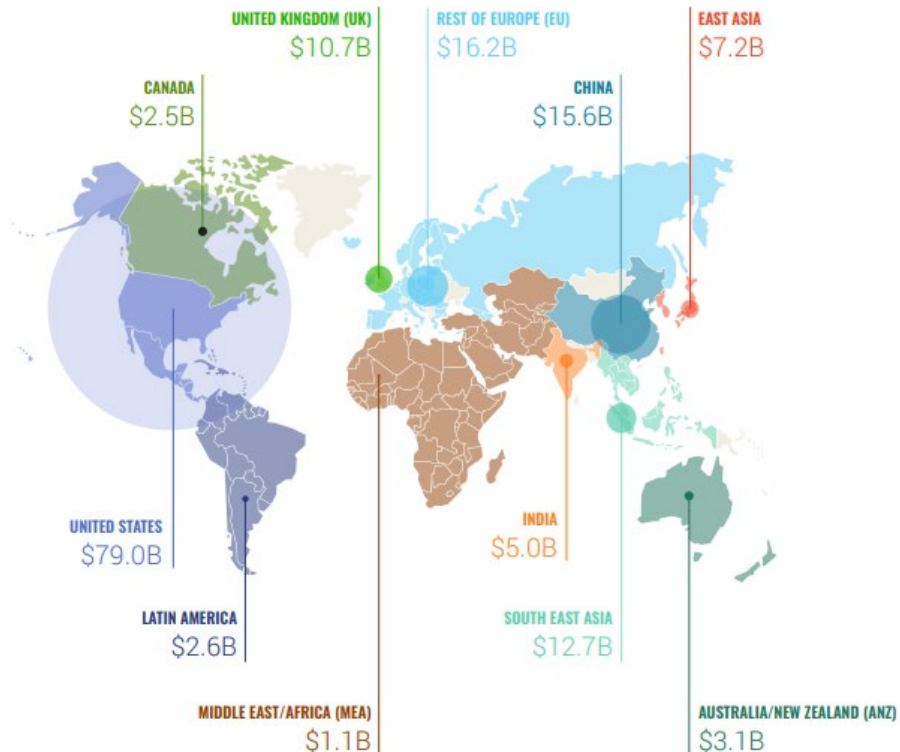
Untapped potential

India market

Cloud - 5x growth in 5 years

HYPERSCALE CLOUD REVENUE BY REGION (2022)

TOTAL: \$155.6B
(IN US\$ BILLIONS)



India - Cloud market

5 Billion

Estimated Cloud market currently

< \$10 per 1 Gbps

Cheap bandwidth

>25%

YoY growth

5G – fuel for the future

THE 5G WAVE: HERE'S HOW INDIA STANDS

BusinessToday.In

IN THE NEXT FIVE YEARS:



India is predicted to have **over 500 million** 5G subscribers



5G will account for **roughly 40%** of all mobile subscriptions in the country

AVERAGE DATA TRAFFIC PER SMARTPHONE:



4G SUBSCRIPTIONS IN THE COUNTRY:



Source: Ericsson Mobility Report

Telecom Operators

Indian Operators have started 5G trials

zinnov

Chipsets & Mobile

GICs of leading chipset firms are increasing spend on 5G



Equipments

GICs of leading TEMs developing India focused applications



Govt.

Government is committed to push Digital Transformation



India's
conductive
ecosystem for
5G adoption



IT Service Providers

5 largest firms – TCS, Infosys, HCL, Wipro, and TechMahindra



Start-ups

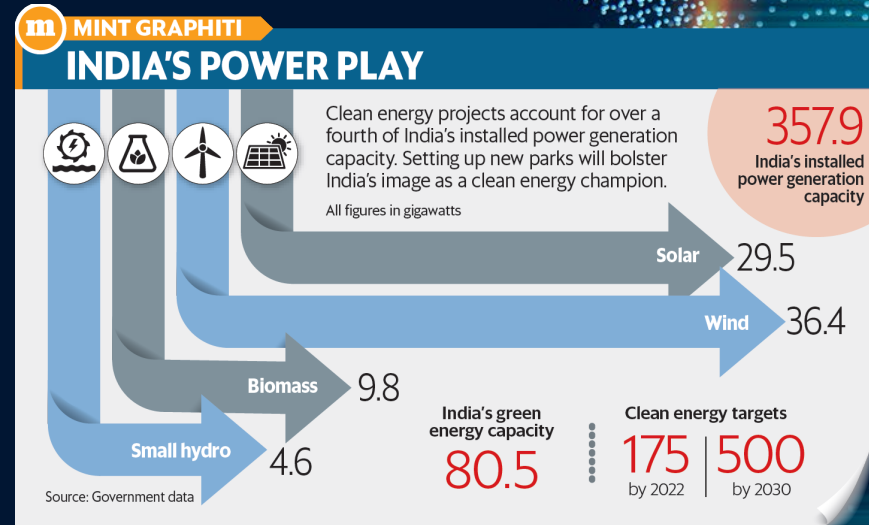
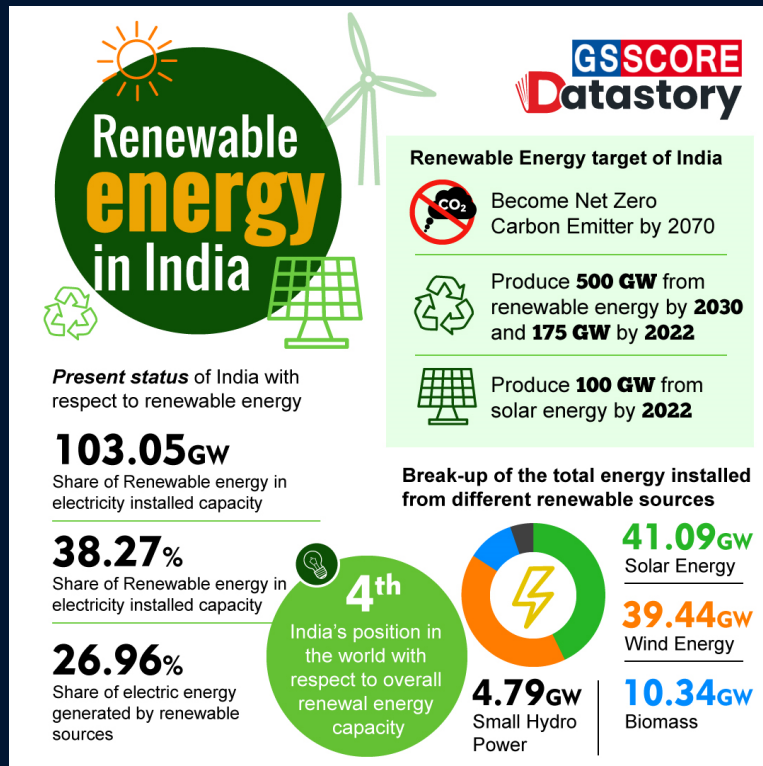
Consumerism and digital adoption are shaping 5G start-ups in India



Universities

5 IITs, 200+ researchers are working on a massive 5G project

Renewables – Sustainable future



OUR DC & RENEWABLES ROADMAP

Late 2021: Decision to adopt renewable energy for our Data Centers for a total of 231 MW: 67 MW currently in operation.

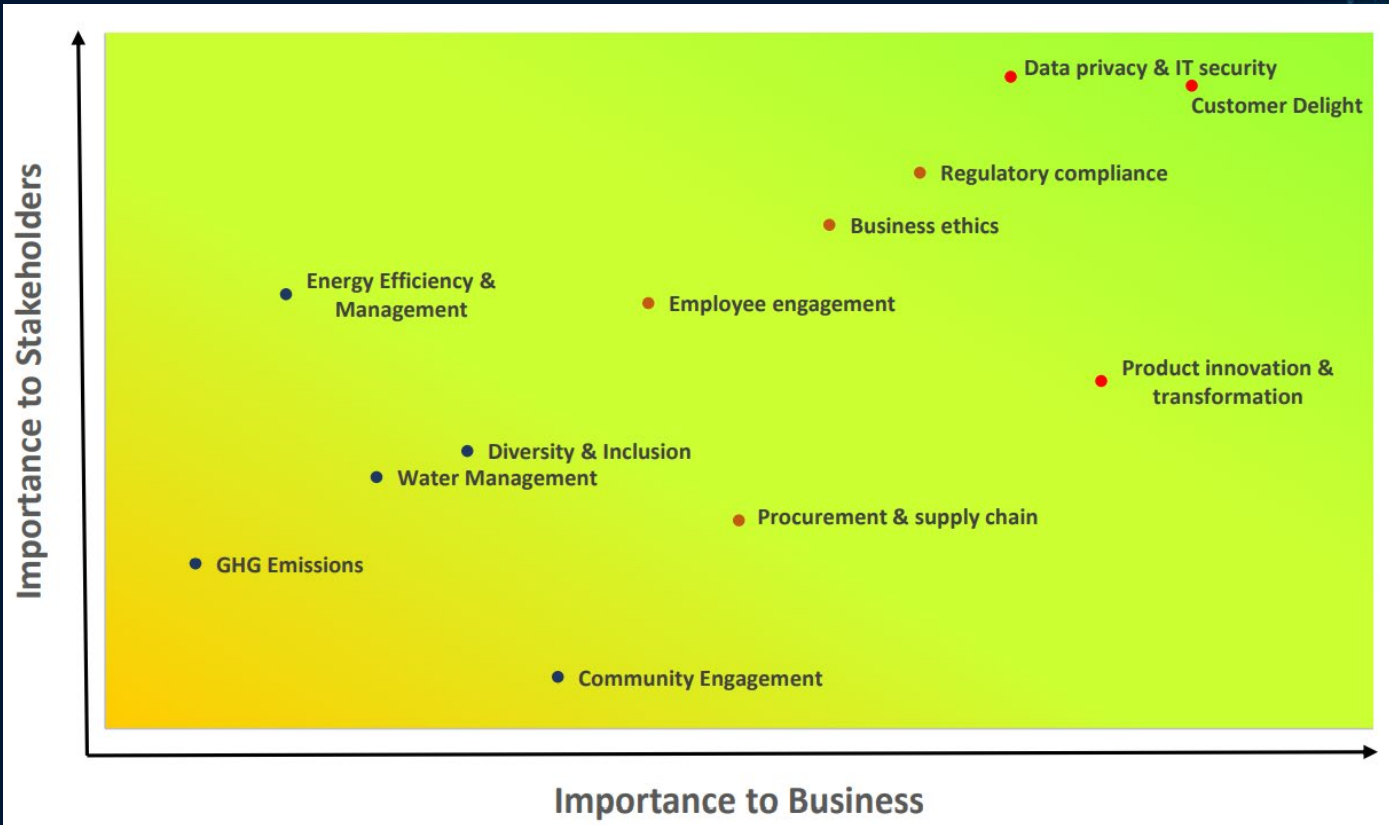


03

Our business

Assets on the ground & the
drawing board

ESG - first steps



ESG - first steps

Sector	Material Topics	SDG Goals			
Environment	GHG Emissions	7 AFFORDABLE AND CLEAN ENERGY	12 RESPONSIBLE CONSUMPTION AND PRODUCTION	13 CLIMATE ACTION	
	Energy Efficiency & Management	7 AFFORDABLE AND CLEAN ENERGY	9 INDUSTRY INNOVATION AND INFRASTRUCTURE	12 RESPONSIBLE CONSUMPTION AND PRODUCTION	13 CLIMATE ACTION
	Water Management	6 CLEAN WATER AND SANITATION	12 RESPONSIBLE CONSUMPTION AND PRODUCTION	13 CLIMATE ACTION	

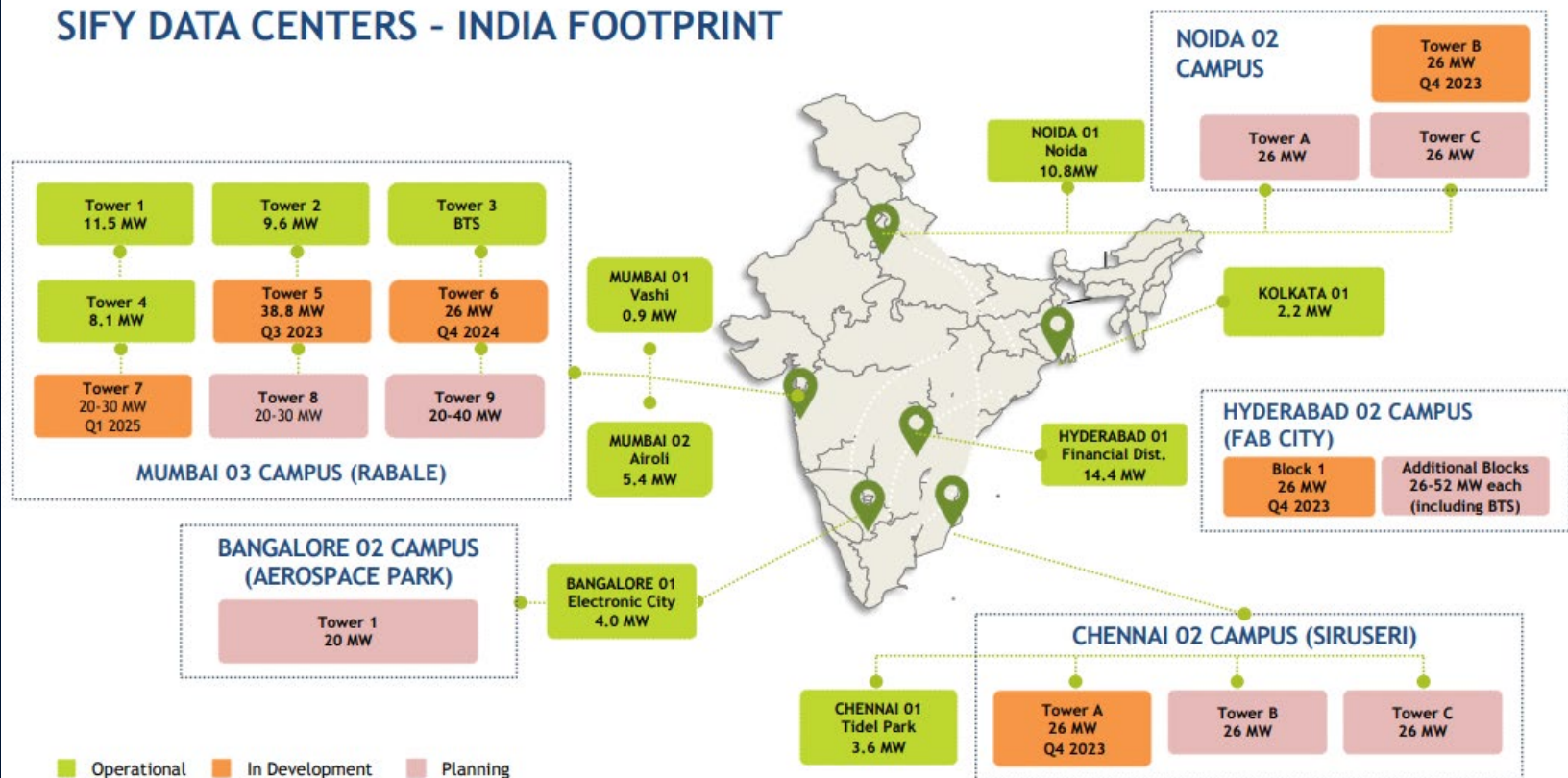
Social	Diversity & Inclusion	5 GENDER EQUALITY	10 REDUCED INEQUALITIES	
	Community Engagement	3 GOOD HEALTH AND WELL-BEING	4 QUALITY EDUCATION	
	Employee engagement	3 GOOD HEALTH AND WELL-BEING	8 DECENT WORK AND ECONOMIC GROWTH	10 REDUCED INEQUALITIES
	Procurement & supply chain	9 INDUSTRY INNOVATION AND INFRASTRUCTURE	17 PARTNERSHIPS FOR THE GOALS	

Governance	Business ethics	12 RESPONSIBLE CONSUMPTION AND PRODUCTION	16 PEACE, JUSTICE AND STRONG INSTITUTIONS	17 PARTNERSHIPS FOR THE GOALS
	Regulatory compliance	16 PEACE, JUSTICE AND STRONG INSTITUTIONS	17 PARTNERSHIPS FOR THE GOALS	
	Data privacy & IT security	9 INDUSTRY INNOVATION AND INFRASTRUCTURE	11 SUSTAINABLE CITIES AND COMMUNITIES	
	Product innovation & transformation	9 INDUSTRY INNOVATION AND INFRASTRUCTURE	11 SUSTAINABLE CITIES AND COMMUNITIES	12 RESPONSIBLE CONSUMPTION AND PRODUCTION
	Customer Delight	8 DECENT WORK AND ECONOMIC GROWTH	9 INDUSTRY INNOVATION AND INFRASTRUCTURE	

Our Data Center ambition

currently **11**

SIFY DATA CENTERS - INDIA FOOTPRINT



All Power references are Design IT Power at Full Capacity

Market Opportunities & Trends

- Edge Data Center Investments Fueled by 5G Deployment
- Use of Renewable Energy in Data Centers
- Growth of Rack Power Density
- Availability of Liquid Cooling to Support AI & ML Workloads

Market Growth Enablers

- Increased Investments by Colocation Providers
- Government Investments in Digital Economy & Data Centers
- Increased Data Center Investments Due to Cloud Adoption
- Data Center Investments Driven by Big Data & IoT Implementation

Market Restraints

- Power Reliability/Network Outage Challenges
- Data Center Security Challenges
- Location Constraints



Data Center DNA

Mission Critical Customers

- 3 out of 4 Hyperscalers
- Global OTT & social media players
- India's top 5 banks
- India's largest digital wallet
- 600+ customers across all major industries

22 years Operational Experience

- 99.999+ uptime
- Best Practices covering Safety, Security, Availability, Excellence and Cost Control
- PUE & WUE prediction and optimization
- Certifications: Information Security, EHS, PCI-DSS, SOC 1 SOC 2

Future-ready Data Centers

- Next Gen Data Center design
- ML/AI platform enabling faster decision-making
- Operational efficiency monitoring and automated reporting
- Up to 79% Green Power available

Trusted Partner

- Reliability for services
- Flexibility for customer requirements
- Scalability for future business growth

Network strength

HYPER-REACH WIDE AREA NETWORK

India's most expansive network 1600+ cities with >3000 POPs

Global Interconnects:
London, Marseille, New York, Los Angeles, Singapore, Hong Kong, Dubai

Local Interconnects:
7 locations in India

Full mesh nX 100G backbone with diverse infra protection

Multiple access media options:
Fiber, Fixed Wireless, Offnet

Infrastructure and Services



Ethernet Services

- MEF E-line compliant & VLAN-based EVPL Services across India
- Transport to Asia, Europe, Middle East



Business Internet Services

- In-country Peering with all content providers/telcos
- IPT to Asia, Europe and North America @ 500 G+
- Performance SLAs with peering in Europe, North America, Asia



IPVPN Services

- QOS and CSC support for easy integration and service extension
- Local interconnect w/ all telcos for diverse access



Cloud Connect Services

- High-availability services to AWS, Azure, Google, Oracle
- Resilient interconnects in Chennai, Mumbai, Delhi, Bengaluru and Hyderabad

Our Cloud infrastructure

CLOUD ENABLING

- Cloud DC
- Hyper reach/Hyper scale transport
Oracle FastConnect | ExpressRoute | DirectConnect | Partner Interconnect
- Software Defined Network services
- Cloud build
Private | Hyperconverged | Enterprise
- Security services for cloud
- Migration and Implementation services



CLOUD INSPIRED

- Sify CloudInfinitt
- Hosted SAP/S4HANA Cloud
- Managed wireless network
- UC on Cloud



CLOUD PURE

- AWS Cloud services
- Azure Cloud services
- Oracle Cloud services
- Multi Cloud Management platform
- Multi Cloud Managed services



CLOUD ENHANCED

- Digital SCM (ForumNXT, SFFNxt)
- Digital Learning (Livewire LMS)
- Digital Assessment (iTest)
- Digital trust (Safescrypt)
- Digital Innovation (App modernization, Analytics, AI/ML, DevOps)
- Enterprise Mobility
- Industry solution-as-a-service



ASSETS ON THE GROUND

11 Pan-India DCs
with >100 MW
capacity

On track to add
350 MW in next 4
years



Largest MPLS
network (by
connections)

3100+ PoPs
across >1600
towns in India



“Cloud
Connect” data
superhighway

53 on-net data
centers



Enterprise and
Hybrid Multi
Cloud

Enterprise
Cloud grid
fabric



Applications and
solutions
Integrate &
Modernization



Remote
Operations
Centers
NOC, SOC,
managed
services



LEADERSHIP



Raju Vegesna
Chairman

Raju Vegesna is an Executive and Entrepreneur who has leveraged his technology vision and leadership skills into a multi-decade series of successes in high technology industries.

Raju is the Chairman and Managing Director of Sify Technologies, a NASDAQ-listed ICT services company based in India.

Raju started his career at Motorola as a microprocessor designer, and founded 2 successful start-ups: Ross Technologies, ServerWorks, and ServerEngines. In less than a decade, these were sold to Broadcom and Emulex for a combined total exit of USD 2.2B.



M P Vijay Kumar
Executive Director &
Group CFO

A Chartered accountant, Cost accountant and Company secretary by training, M P Vijay Kumar was recently elevated to the post of Executive Director and Group CFO of Sify. He also serves as a Member on the IFRS Interpretation committee of International Accounting Standards Board and IFRS Advisory Council of the IFRS Foundation, London. He is an author and speaker on the professional circuit on IFRS, Accounting Standards, Audit, Corporate Laws and Capital Market.

His early professional life included being a Partner at a chartered accountants' firm prior to which, he headed the Investment Banking portfolio of Sundaram Finance Services Ltd., Chennai.



David Nishball
Chief Strategy Officer

David Nishball Chief Strategy Officer - David Nishball is one of the leading experts in building and managing Enterprise telecom operations, having led the Enterprise segment for a number of global operators, joint venture companies, and emerging market operators. David has served as Chief Strategy Officer of Sify since 2011. He brings thirty years of experience spanning various roles in the industry, including over 20 years in the Asia Pacific Region. David was President of Airtel Enterprise Services from 2007-10. Earlier, he led the Asia Pacific region for AT&T and Orange Business services and led the Concert joint venture between AT&T and BT in Asia.



Kamal Nath
Chief Executive
Officer - India

Kamal joined Sify in August 2012 to help realize Sify 3.0; the vision to make Sify Technologies a Solutions and Services leader.

He has led various transformational engagements with Large enterprises, incubated business lines, created innovative business models and promoted entrepreneurial Decision making.

His knowledge of Systems Integration Services, IT Infrastructure Management Services, Technology Integration Services & Strategic Outsourcing will be vital to achieving the next phase of growth for Sify.

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Do you have any questions?

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