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

<table>
<thead>
<tr>
<th>Metrics</th>
<th>Amount</th>
<th>5 Year CAGR</th>
<th>Income in USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>$356 Mil</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>EBITDA</td>
<td>$80 Mil</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>PAT</td>
<td>$17 Mil</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>CAPEX</td>
<td>$97 Mil</td>
<td>96%</td>
<td></td>
</tr>
</tbody>
</table>

In $ MN in constant currency 1 USD @ INR **75.81** (March 31, 2022) (Audited)
<table>
<thead>
<tr>
<th>Financial metrics – Q3 &amp; 9 MONTHS ENDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>REVENUE</td>
</tr>
<tr>
<td>USD 107 Mil</td>
</tr>
<tr>
<td>USD 297 Mil</td>
</tr>
</tbody>
</table>

In $ MN in constant currency 1 USD @ INR 82.7862 (December 31, 2022) (Unaudited)
Revenue share
3 business in %

- **27%** Data Center Services
- **37%** Network Services
- **36%** Digital Services
Untapped potential

India market
Cloud - 5x growth in 5 years

**HYPERSCALE CLOUD REVENUE BY REGION (2022)**

**TOTAL: $155.6B**  
(in USS billions)

- **UNITED STATES**: $79.0B
- **UNITED KINGDOM (UK)**: $10.7B
- **CHINA**: $15.6B
- **VENUE (EU)**: $16.2B
- **EAST ASIA**: $7.2B
- **LATIN AMERICA**: $2.6B
- **MIDDLE EAST/AFRICA (MEA)**: $1.1B
- **AUSTRALIA/NEW ZEALAND (ANZ)**: $3.1B
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

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:

- 2021: 20GB/month
- 2027 (Projected): 50GB/month (+6% CAGR rise)

4G SUBSCRIPTIONS IN THE COUNTRY:

- 2021: 68%
- 2027 (Projected): 55%

Source: Ericsson Mobility Report

Telecom Operators
Indian Operators have started 5G trials

Chipsets & Mobile
GICs of leading chipset firms are increasing spend on 5G

Equipment
GICs of leading TEMs developing India focused applications

Govt.
Government is committed to push Digital Transformation

India’s conducive 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

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

**Renewable Energy target of India**
- Become Net Zero Carbon Emitter by 2070
- Produce 500 GW from renewable energy by 2030 and 175 GW by 2022
- Produce 100 GW from solar energy by 2022

**Present status of India with respect to renewable energy**
- **103.05 GW** Share of Renewable energy in electricity installed capacity
- **38.27%** Share of Renewable energy in electricity installed capacity
- **26.96%** Share of electric energy generated by renewable sources

**Break-up of the total energy installed from different renewable sources**
- **41.09 GW** Solar Energy
- **39.44 GW** Wind Energy
- **4.79 GW** Small Hydro Power
- **10.34 GW** Biomass

**India’s green energy capacity**
- **80.5 GW**

**Clean energy projects** account for over a fourth of India’s installed power generation capacity. Setting up new parks will bolster India’s image as a clean energy champion.

All figures in gigawatts

**Clean energy targets**
- **175 GW** by 2022
- **500 GW** by 2030

**357.9 GW** India’s installed power generation capacity

**OUR DC & RENEWABLES ROADMAP**
Our business
Assets on the ground & the drawing board
ESG - first steps
## ESG - first steps

<table>
<thead>
<tr>
<th>Sector</th>
<th>Material Topics</th>
<th>SDG Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td>GHG Emissions</td>
<td>7, 9, 12, 13</td>
</tr>
<tr>
<td></td>
<td>Energy Efficiency &amp; Management</td>
<td>7, 9, 12, 13</td>
</tr>
<tr>
<td></td>
<td>Water Management</td>
<td>6, 9, 12, 13</td>
</tr>
</tbody>
</table>

| Social          | Diversity & Inclusion                      | 5               |
|                 | Community Engagement                       | 3               |
|                 | Employee engagement                        | 3               |
|                 | Procurement & supply chain                 | 9, 17           |

### Governance
- Business ethics
- Regulatory compliance
- Data privacy & IT security
- Product innovation & transformation
- Customer Delight
Our Data Center ambition currently

SIFY DATA CENTERS - INDIA FOOTPRINT

MUMBAI 03 CAMPUS (RABALE)
- Tower 1: 11.5 MW
- Tower 2: 9.6 MW
- Tower 3: BTS
- Tower 4: 8.1 MW
- Tower 5: 38.8 MW (Q3 2023)
- Tower 6: 26 MW (Q4 2024)
- Tower 7: 20-30 MW (Q1 2025)
- Tower 8: 20-30 MW
- Tower 9: 20-40 MW

MUMBAI 02
- Tower 1: Vashi 0.9 MW
- Tower 2: Airoli 5.4 MW

BANGALORE 02 CAMPUS (AEROSPACE PARK)
- Tower 1: Electronic City 4.0 MW

NOIDA 02 CAMPUS
- Tower A: 26 MW
- Tower B: 26 MW (Q4 2023)
- Tower C: 26 MW

NOIDA 01
- Tower A: 26 MW
- Tower B: 10.8 MW

KOLKATA 01
- Tower A: 2.2 MW

HYDERABAD 02 CAMPUS (FAB CITY)
- Tower A: 26 MW (Q4 2023)
- Additional Blocks 26-52 MW each (including BTS)

HYDERABAD 01
- Financial Dist. 14.4 MW
- Block 1: 26 MW (Q4 2023)

CHENNAI 02 CAMPUS (SIRUSERI)
- Tower A: 26 MW (Q4 2023)
- Tower B: 26 MW
- Tower C: 26 MW

CHENNAI 01
- Tidel Park 3.6 MW

Legend:
- Green: Operational
- Orange: In Development
- Pink: Planning

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 CloudInfinit
- 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
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.

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 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 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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