SIFY’S JOURNEY: 25 YEARS OF TRANSFORMATION

From revolutionizing consumer internet in the 90s to driving adoption of digital ICT services

- **1995 - 1999**: First private ISP in India
- **2000 - 2005**: Launch of MPLS & Data Center services in India
- **2006 - 2012**: Launch of Cloud services
- **2013 - 2017**: Launch of private and hybrid cloud services
- **2018 - 2020**: Launch of complete end-to-end digital ICT services
- **2021 - 2025**: Launch of Digital bridge for transformation services
PRESENT
### Financial Metrics - Q1 - Last 5 Years

<table>
<thead>
<tr>
<th>Metric</th>
<th>CAGR</th>
<th>USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>12%</td>
<td>104 Mil</td>
</tr>
<tr>
<td>EBITDA</td>
<td>19%</td>
<td>21 Mil</td>
</tr>
<tr>
<td>PAT</td>
<td>(19)%</td>
<td>1 Mil</td>
</tr>
<tr>
<td>CAPEX</td>
<td>(36)%</td>
<td>18 Mil</td>
</tr>
</tbody>
</table>

In $ MN in constant currency 1 USD @ INR 82.04 (June 30, 2023) (Unaudited)
FINANCIAL METRICS - LAST 5 YEARS

In $ MN in constant currency 1 USD @ INR 82.04 (March 31, 2023) (Audited)

REVENUE
12% CAGR
USD 407 Mil

EBITDA
19% CAGR
USD 77 Mil

PAT
(11)% CAGR
USD 8 Mil

CAPEX
10% YoY
USD 99 Mil
<table>
<thead>
<tr>
<th>INFRASTRUCTURE &amp; SERVICES ADVANTAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 Pan-India DCs with &gt;100 MW capacity</td>
</tr>
<tr>
<td>Hosting for hyperscale operators</td>
</tr>
<tr>
<td>Largest MPLS network (by connections)</td>
</tr>
<tr>
<td>3100+ PoPs across 1630 towns in India</td>
</tr>
<tr>
<td>Interconnect Public and Private clouds</td>
</tr>
<tr>
<td>“Cloud Connect” data superhighway</td>
</tr>
<tr>
<td>53 on-net data centers</td>
</tr>
<tr>
<td>“Cloud Connect” data superhighway</td>
</tr>
<tr>
<td>Enterprise and Hybrid Multi Cloud</td>
</tr>
<tr>
<td>Enterprise Cloud grid fabric</td>
</tr>
<tr>
<td>Applications and solutions Integrate &amp; Modernization</td>
</tr>
</tbody>
</table>
cloud@core
Aligned to our customer’s transformational pursuit

**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

Aligned to our Customer’s Cloud Transformation Pursuit
OUR DC FOOTPRINT: 11 DATA CENTERS STRONG

- Delhi Noida
- Kolkata Salt Lake City
- Mumbai Vashi, Aroli & Rabale - 4 units
- Hyderabad Gachibowli
- Bengaluru Electronic City
- Chennai TIDEL Park
FUTURE
In 2022, India overtook the U.K. to become the world’s 5th largest economy.

GDP of India and the United Kingdom (in Trillion U.S. dollar)

2022: USD 3.53 Trn
2022: USD 3.38 Trn

India’s digital economy is expected to reach USD 1 Trillion by 2025.

Powered by India’s digital tsunami.

India’s growth projections are driven, in significant measure, by the digital tsunami sweeping the country.
THE STARTUP REVOLUTION

Q1 2022 minted 10 Unicorns

- XpressBees
- Darwinbox
- Games24x7
- LeadSchool
- Elasticrun
- Oxyzo
- LivSpace
- Hasura
- DealShare
- Yubi

Of the 100 India unicorns, 60 joined the club in the last 16 months

No. of startups that became unicorn

- Funding trends in India tech
  - Tech companies raise USD 8.4 Billion in Q1 2022, a 22% Y-O-Y growth, across 470 funding rounds
  - Since 2010, Tech companies in India have raised over USD 127.9 Billion in equity funding

BT Unicorn tracker

- India saw 10 companies joining unicorn club in Q1
- Globally, India ranks 4th (96) in overall unicorns created

Top 5 countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>1,979</td>
</tr>
<tr>
<td>US</td>
<td>1,036</td>
</tr>
<tr>
<td>China</td>
<td>252</td>
</tr>
<tr>
<td>UK</td>
<td>100</td>
</tr>
<tr>
<td>India</td>
<td>96</td>
</tr>
</tbody>
</table>
The 5G wave: Here’s how India stands

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

In the next five years
India is predicted to have over 500 Million 5G subscribers.

4G subscriptions in the country
2021 2027 projected
2027 projected

Average data traffic smartphone
2027 projected 20 GB/month
50 GB/month @10% CAGR rise

50 GB/month

Several factors will contribute to the sustained growth of the 5G market in India.

Telecom operators
Indian operators have started 5G trials.

IT service providers
5 largest firms - TCS, Infosys, HCL, Wipro, and Tech Mahindra.

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

Startups
Consumerism and digital adoption are shaping 5G startups in India

Equipments
GCs of leading TEMs developing India-focused applications

Government Support
Government is committed to push Digital Transformation

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

5G - FUELING THE FUTURE
ESG AND MATERIALITY REPORTING

Sify’s material topics

1. Customer delight
2. Data privacy & IT security
3. Regulatory & compliance
4. Business ethics
5. Product innovation
6. Employee engagement
7. Energy efficiency & management
8. Diversity & Inclusion
9. Procurement & supply chain
10. Water management
11. GHG emissions
12. Community engagement

UN SDGs impacted

Importance to stakeholders

Importance to business

Low  Moderate  High
Thank you