01 Past performance

Business performance to date

02 Untapped potential

India market

03 Our business

Assets on the ground & the drawing board

04 Sustainability

Roadmap
Past performance

Our 5 year track record & as on date
25 YEARS OF TRANSFORMATION

CONSUMER FACING ISP
First private ISP in India

SHIFT TO AN ENTERPRISE SERVICES COMPANY
Launch of MPLS & Data Center services in India

TRANSFORMATION INTO ICT SERVICES COMPANY
Launch of Enterprise Cloud services

DIGITAL ICT SERVICES PROVIDER (cloud@core)
Launch of private and hybrid cloud services

DIGITAL TRANSFORMATION SERVICES PROVIDER (digital@core)
Launch of end-to-end digital services

RELEVANCE
Products and Services always aligned to market trends and customer need

INVESTMENTS
Investments in line with market trend and strategic objectives

ACHIEVEMENTS
Recognized as a trend setter or leader in multiple lines of business

GROWTH
Consistent growth through investments and customer engagements

From revolutionizing consumer internet in the 90s to driving adoption of digital ICT services
<table>
<thead>
<tr>
<th>Financial metrics – Last 5 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>REVENUE</td>
</tr>
<tr>
<td>USD 356 Mil</td>
</tr>
<tr>
<td>7%</td>
</tr>
</tbody>
</table>

5 YEAR CAGR

In $ MN in constant currency 1 USD @ INR 75.81 (March 31, 2022) (Audited)
## Financial metrics – Q3 & 9 MONTHS ENDED

<table>
<thead>
<tr>
<th>REVENUE</th>
<th>EBITDA</th>
<th>CAPEX</th>
</tr>
</thead>
<tbody>
<tr>
<td>USD 104 Mil</td>
<td>USD 20 Mil</td>
<td>USD 40 Mil</td>
</tr>
<tr>
<td>USD 313 Mil</td>
<td>USD 59 Mil</td>
<td>USD 108 Mil</td>
</tr>
</tbody>
</table>

In $ MN in constant currency 1 USD @ INR 83.1164 (December 31, 2023) (Unaudited)
Key information – Last 5 years

In $ MN in constant currency 1 USD @ INR 82.2169 (March 31, 2023) (Audited)
Capex - Segment wise

FY 20-21
- Data Centre: 53%
- Non-Data Centre: 47%

FY 21-22
- Data Centre: 25%
- Non-Data Centre: 75%

FY 22-23
- Data Centre: 28%
- Non-Data Centre: 72%
Revenue share % Q3 FY 2023-24

- DATA CENTER SERVICES: 32%
- NETWORK SERVICES: 40%
- DIGITAL SERVICES: 28%
02 Untapped potential
India market
Investor confidence

Institutional inflows in Data centers (USD million)

About 54% of the total investment inflows in alternatives post pandemic (2020 onwards) were from data centers.

Institutional investments in Data centers surged ~12X post pandemic (2020-22) compared to pre-pandemic time (2017-19).

Foreign investors accounted for over 93% of the total inflows in data centers post pandemic (2020 onwards).

Total investments since 2020
USD ~7bn

Why are investors attracted to India’s data center market?

- Strong growth prospects owing to increased cloud adoption, digital penetration and generative AI.
- Robust demand from Hyperscalers and Tech, BFSI occupiers.
- Relatively low land, labour and construction costs compared to other markets.
- Indian data center operators are increasingly focusing on sustainability through energy-efficient technologies to reduce energy consumption.
- Regulatory reforms supporting data center growth, boosting investor confidence.
- Attractive yields of 16-17% compared to 7-10% in retail, office and warehousing sector.
- Demand for core assets remains volatile amidst externalities.

Source: Colliers
Green plans

Green penetration in Data center stock of 6 top cities in India

- 20% of the current data center capacity in India is LEED certified
- 61% rise in green data center capacity since 2020 levels
- Majority of the data center operators opt for a minimum LEED gold certification

Source: Colliers

What has been done so far?
- 17-20% reduction in electricity consumption using renewable energy sources from 2020 levels
- 20-25% renewable energy penetration
- 23-35% reduction in operational emissions from 5 year old levels
- 24-28% reduction in overall carbon footprint and 20-40% reduction in overall energy cost over the last 2-3 years
- 5-7% improvement in PUE and 18% improvement in WUE since 2020 levels.
- Sourcing green energy through public and private partnerships in major data centers across Karnataka, Tamil Nadu, Maharashtra and Delhi NCR

Short-term goals
- To source more than 50% of energy needs from renewable energy by 2026
- 40% reduction in emission intensity within data center operations by 2026
- Commit to optimizing overall power use by operating its data centers within wider temperature parameters

Long-term goals
- Achieve carbon-neutral data center operations by 2030
- 100% wastewater recycling at data centers by 2030
- New data centers design with green building strategies and ‘zero discharge’ spaces
- Significant commitment to dedicated renewable investments - solar and wind
Indian digital Economy

Digital adoption has now reached the tipping point across most sectors in India’s internet economy.

- 220M: shopped online
- 110M: made purchases in online games
- 65M: ordered food online
- 80M: households paid utility bills online
- 25M: used online ride-hailing services
- 15M: have paid for an online course
Internet economy vs IT services

India’s internet economy is expected to reach $1T by 2030, double the value of IT services.

- **2010**:
  - Internet economy: $8B-10B
  - Technology sector: $50B-60B
  - Internet economy’s share of GDP: 0.5%

- **2022**:
  - Internet economy: $155B-175B
  - Technology sector: $320B-350B
  - Internet economy’s share of GDP: 4-5%

- **2030**:
  - Internet economy: $900B-1,000B
  - Technology sector: $1,450B-1,550B
  - Internet economy’s share of GDP: 12-13%

Note: Absolute figures represent consolidated internet economy size across sectors. 1. Technology sector includes information technology (IT), business process management (BPM) and the internet economy. Source: Bain analysis.
India – Data Center market by Geographic Spread

Demographic Spread for DCs in India

- Current: 88%
- Future: 73%

Key Location:
- Mumbai & Chennai: Maximum concentration of landing points
- Under-sea cables: 17 landing stations
- Landing stations: 29

Current Supply:
- Mumbai: 41%
- Bengaluru: 21%
- BENGALURU: 6%
- Delhi-NCR: 10%
- Chennai: 7%

Future Supply:
- Mumbai: 31%
- Bengaluru: 14%
- Chennai: 18%

Future Supply by IT Power (MW):
- Mumbai: 40%
- Bengaluru: 15%
- Delhi-NCR: 13%
- Chennai: 6%

Source: Enrinrac Consulting, Anamrock & Channel Checks
India – Data Center market by Investment

INDIA DATA CENTER MARKET
INVESTMENT ANALYSIS & GROWTH OPPORTUNITIES 2023-2028

The India data center market size will witness investments of USD 9.96 billion by 2028.

2023

2028

10.7% CAGR

2022-2028

MARKET DYNAMICS
- Improvement in Inland & Submarine Connectivity
- Increasing Cloud Service Adoption
- Increase in Data Center Investment & Activities

KEY PROMINENT VENDORS
- Arista Networks
- Broadcom
- Dell Technologies
- Hewlett Packard Enterprise
- Atos
- Cisco Systems
- Fujitsu

www.arizton.com
India - Cloud market

$17.8 Billion
Estimated Cloud market by Yr 2027

FY 2022-2027

CAGR 23.4%

$6.2 Billion
Yr 2022
India – Network connectivity

India’s Growing Internet Connectivity
Internet penetration rate in India (in percent)

<table>
<thead>
<tr>
<th>Year</th>
<th>Rural India</th>
<th>Urban India</th>
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<tbody>
<tr>
<td>'12</td>
<td>13</td>
<td>65</td>
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<tr>
<td>'23</td>
<td>49</td>
<td></td>
</tr>
</tbody>
</table>

* provisional
Sources: Hootsuite, We Are Social, Kepios via DataReportal

INDIA 2ND LARGEST AFTER CHINA

- 227m Rural India
- 205m Urban India

71m kids aged between 5-11 also go online using adults’ devices

- 503m India
- 850m China

Gender Distribution (as %)
- All India: 65, 35
- Urban India: 60, 40
- Rural India: 69, 31

Age Distribution (in %)
- 50+: 9
- 40-49: 6
- 30-39: 14
- 20-29: 34
- 16-19: 17
- 12-15: 14
- 10-15: 6
- 6-11: 9
- 0-5: 9

Source: IAMAI/Nielsen
## Assurance

<table>
<thead>
<tr>
<th></th>
<th>Sify Technologies</th>
<th>Sify Infinit Spaces</th>
<th>Sify Digital Services</th>
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<tbody>
<tr>
<td><strong>LONG TERM</strong></td>
<td>AA-</td>
<td>AA-</td>
<td>A+</td>
</tr>
<tr>
<td><strong>SHORT TERM</strong></td>
<td>A1+</td>
<td>A1+</td>
<td>A1+</td>
</tr>
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</table>

ICRA & CARE

ICRA & CARE

ICRA & CARE
Our business

Assets on the ground & the drawing board
Our Data Center spread

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 Q1 2025
- Tower 7: 20-30 MW Q3 2025
- Tower 8: 20-30 MW
- Tower 9: 20-40 MW

MUMBAI 02
- Tower 1: 20 MW
- Tower 2: 5.4 MW

BANGALORE 02 CAMPUS (AEROSPACE PARK)
- Tower 1: 20 MW
- Electronic City: 4.0 MW

BANGALORE 01
- Vashi: 0.9 MW

HYDERABAD 02 CAMPUS (FAB CITY)
- Tower A: 26 MW
- Financial Dist.: 14.4 MW
- Block 1: 26 MW
- Additional Blocks: 26-52 MW each (including BTS)

HYDERABAD 01
- Noida: 10.8 MW
- Tower A: 26 MW
- Tower B: 26 MW Q1 2024

NOIDA 01 CAMPUS
- Tower B: 26 MW
- Tower C: 26 MW

KOLKATA 01
- Tower B: 2.2 MW

MUMBAI 01
- Tower: 11.5 MW

NOIDA 02 CAMPUS
- Tower B: 26 MW

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

CHENNAI 02 CAMPUS (SIRUSERI)
- Tower A: 26 MW
- Tower B: 26 MW Q1 2024
- Tower C: 26 MW

CHENNAI 01
- Tidel Park: 3.6 MW

BANGALORE 01
- Electronic City: 4.0 MW

CHENNAI 01
- Tidel Park: 3.6 MW

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All Power references are Design IT Power at Full Capacity.
Kotak has invested $120 ml (INR 10,000 mln) through Kotak Special Situation Fund and Kotak Data Centre Fund in Sify Infinit Spaces Limited (wholly owned subsidiary of Sify Technologies Limited) through Compulsorily Convertible Debentures for the expansion of Data Centre.
# 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

12 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
65 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
Overview

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 & MI 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
04 Sustainability Roadmap
Sustainability - materiality

- Energy Efficiency & Management
- Diversity & Inclusion
- Water Management
- GHG Emissions
- Community Engagement
- Employee engagement
- Procurement & supply chain
- Product innovation & transformation
- Business ethics
- Regulatory compliance
- Data privacy & IT security
- Customer Delight
## ESG - UNSDG alignment

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

### Social
- Diversity & Inclusion
- Community Engagement
- Employee engagement
- Procurement & supply chain

### Governance
- Business ethics
- Regulatory compliance
- Data privacy & IT security
- Product innovation & transformation
- Customer Delight
Late 2021: Decision to adopt renewable energy for our Data Centers for a total of 231 MW. 67 MW currently in operation.
LEADERSHIP

Raju Vegesna is a renowned global executive and technologist with thriving private and philanthropic ventures across continents. A first generation entrepreneur, he went on to co-found Ross Technology Inc., establishing his expertise in microprocessors and multiprocessor technologies. His leadership was further solidified through multi-billion-dollar exits from two Silicon Valley (USA) enterprises he founded, ServerWorks and ServerEngines. Raju then saw an opportunity in the future success of his country by investing in Sify Technologies, one of India’s earliest internet pioneers. He has further invested in India’s technology ecosystem through his venture capital fund, Sify Ventures.

M P Vijay Kumar
Executive Director & Group CFO

A Chartered accountant, Cost accountant and Company secretary by training, M P Vijay Kumar or MPV as he is fondly known, is the ED & Group CFO. He is also an Independent Director and Chairman of the Audit Committee on the Board of LIC and an Independent Director on the Boards of Geojit Financial Services Ltd and Heritage Foods Ltd. 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 served as Council Member of Institute of Chartered Accountants of India (2016-2022), was Chairman of Accounting Standards Board and Ex Officio Member of National Financial Reporting Authority for the period 2019-2022. 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 over 3 decades 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. As the author-evangelist of Sify 4.0, Sify’s transformation into a Digital Transformation Partner, he brings his knowledge of Managed Services, Infrastructure Management Services, Strategic Outsourcing and new age technologies like AI/ML, LLM and AR/VR to the aid of Enterprises caught in the flux to be relevant to the new world.
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Do you have any questions?
praveen.krishna@sifycorp.com
+919840926523