

INVESTOR PRESENTATION

Q1 FY 2024 - 25

Sify is your digital bridge for transformation, built on our world class digital IT infrastructure, digitalized services & core digital platforms.

25 YEARS OF TRANSFORMATION

Sify 1.0

Consumer internet

CONSUMER FACING ISP

First private ISP in India

Sify 2.0

Enterprise internet

SHIFT TO AN ENTERPRISE SERVICES COMPANY

Launch of MPLS & Data Center services in India

Sify 3.0

Cloud platform - Public, Private and Hybrid

DIGITAL ICT SERVICES PROVIDER

Launch of Enterprise Cloud services

Sify 4.0

Digital First

DIGITAL TRANSFORMATION SERVICES PROVIDER

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

GROUP COMPANIES



NETWORK
SERVICES

**Sify Technologies
Ltd.**



DATA CENTER
INFRASTRUCTURE

**Sify Infinit Spaces
Ltd.**



CLOUD &
DIGITAL SERVICES

**Sify Digital
Services Ltd.**

READY RECKONER

NETWORK SERVICES

**Sify Technologies
Ltd.**

- Reaches 1700+ Towns and cities in India
- Sify Dark Fibre - 112,564 Kms
- Fiber in 9 cities - 11 more Cities to be fiberized by FY 2022-23
- 48 DC's/CLS and cloud providers
- Nx400 G metro networks deployed in India
- 3700 base stations
- 1600 cities and towns
- Connects >65 on-net DCs across India

DATA CENTER SERVICES

**Sify Infinit Spaces
Ltd.**

- 3 out of 4 Hyperscalers collocate with us
- Also includes India's Top 5 banks
- And India's largest digital wallet
- 190 MW IT power available
- 12 DC live
- 350 MW by 2025
- 2 more hyperscale DCs to be deployed before end 2024
- 99.999+ Uptime

DIGITAL & IT SERVICES

**Sify Digital
Services Ltd.**

- Hosted AI Platform (Multi Instance GPU) as a Service
- Full Stack Observability Platform
- Multi-Cloud Platform
- Hosted Private Cloud as a Service
- Hyperscale Cloud Services
- Enterprise Applications Services: SAP, Oracle, Microsoft

DATA CENTER SERVICES – an overview



DIGITAL SERVICES – an overview

Customer Experience

- Digital Asset Management Platform
- Digital Distributor Management Platform

Operational Excellence

- Full Stack Observability Platform (FSO)
- AllOps Automation Platform (AOAP)

Data and Analytics

- Distributed Cloud Intelligent Edge as a Service (DCIEaaS)
- Sify Industrial Application Platforms – SAP|ORACLE|MSFT

Talent and Culture

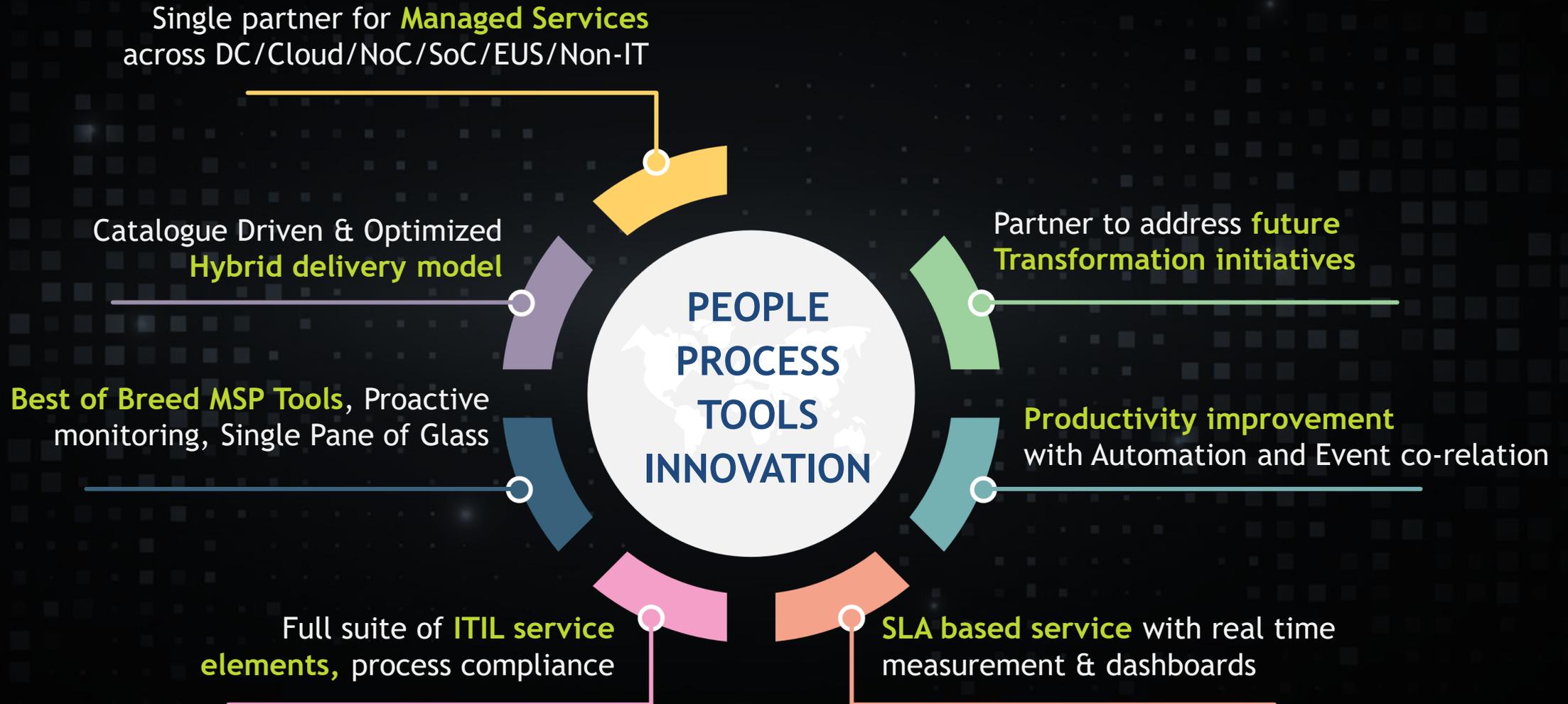
- Digital Assessment Platform
- Digital Augmentation Platform – AR|VR|MR

Sify Digital Service offerings cater to Day 2 of the digital transformation journey building upon the foundation laid on Day 1

Key components include but not limited to

- **Enhance customer experience:** Focus on improving customer experience through digital channels and touchpoints.
- **Foster Operational excellence:** Comprehensive visibility and actionable insights for optimized performance, automation of processes, governance and compliance
- **Enable data-driven decision-making:** Establish data governance frameworks and analytics capabilities to leverage data for insights and decision-making.
- **Foster a digital culture:** Drive a cultural shift within the organization to embrace digital transformation.

WHAT MAKES SIFY UNIQUE



GLOBAL PRESENCE



Cities

- 12 Operational Data Centers
- 65 Connected Data Centers
- 50+ Pan-India Edge Nodes
- Open Cable Landing System
- Delivery Centers in 5 Major Indian

Presence in 6 countries

Partnering with enterprises for Digital Transformation

Proven track record of executing complex programs

Over 3000+ skilled associates

Quality benchmarks - CMMi 5, ISO 9001, ISO 27001, SSAE 16 certifications

Sify 4.0 – THE DIGITAL BRIDGE TO TRANSFORMATION



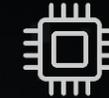
Infrastructure for Digital IT

- Cloud adjacent Data Centers
- Hosted Private Cloud as a Service
- Hyperscale Cloud Services
- Hosted AI Platform (Multi Instance GPU) as a Service
- On Demand Customer Provisioned Network
- Hyperscale Cloud Interconnects
- Edge Connect Services - Pvt 5G & Wi-Fi
- Zero Trust Security
- SD WAN & SASE



Digitalized Services (AI/ ML powered)

- IT Managed Services
- Network Managed Services
- Security Managed Services
- Multi-Cloud Platform
- Modern App Development as a Service, DevSecOps
- Full Stack Observability Platform



Core Digital

- Digital Asset Management Platform
- Digital Dealer Management Platform
- Digital Augmentation Platform (eLearning, AR/VR)
- Digital Assessment Platform
- Enterprise Applications Services: SAP, Oracle, Microsoft

Sify 4.0 is your digital bridge for transformation, built on our world class digital IT infrastructure, digitalized services & core digital platforms.

NETWORK CONNECTIVITY – an overview

Over 2 decades of expertise in building and operating infrastructure for over 3000 Enterprise Customers



WAN Coverage in 1700+ cities

- SDN powered enterprise networks
- Submarine network capacities to Europe, ME, & SE Asia



Wireless Network

- Fixed wireless coverage across all major cities in India
- Engineered technology suiting enterprise needs



Open CLS serving Europe/Asia cables

- Mumbai CLS (Versova)
- Chennai CLS in progress



Long Distance Express Network

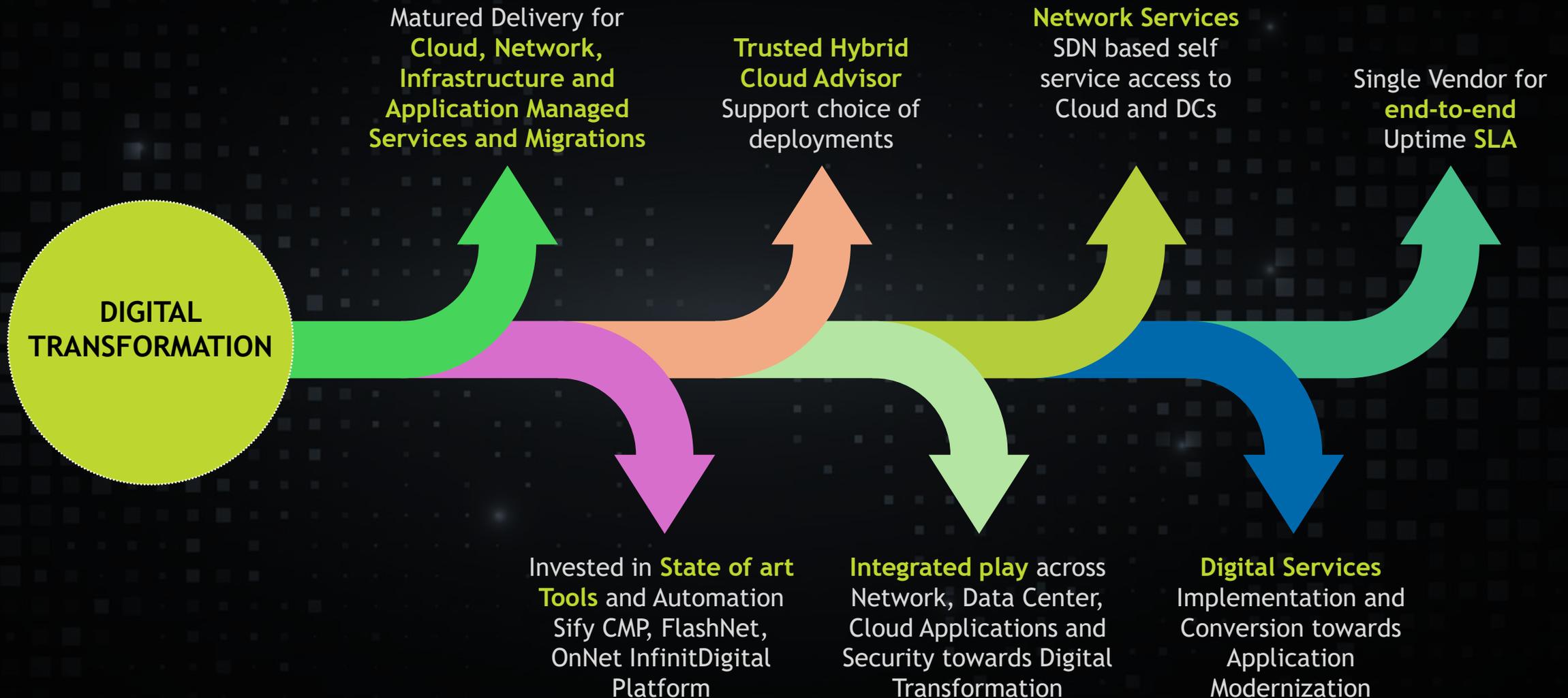
- Major national trunk low latency routes
- Resilient at scale



Hyperscale infra in 7 metros

- Data-centric topology
- Gigabit bandwidths
- Expansion to 20 cities

SIFY AS YOUR STRATEGIC LONG TERM PARTNER

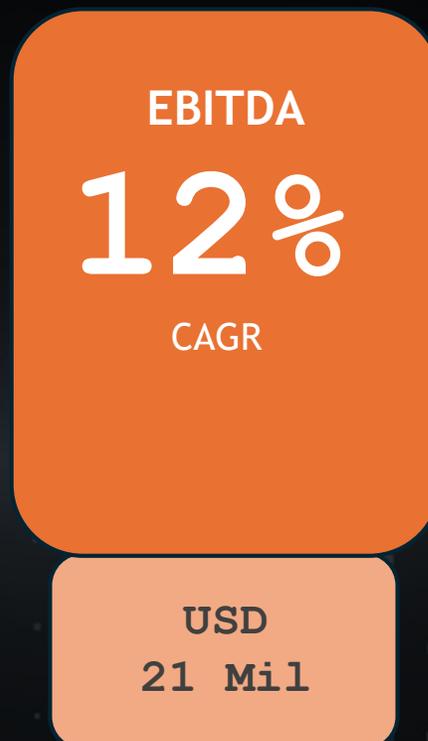
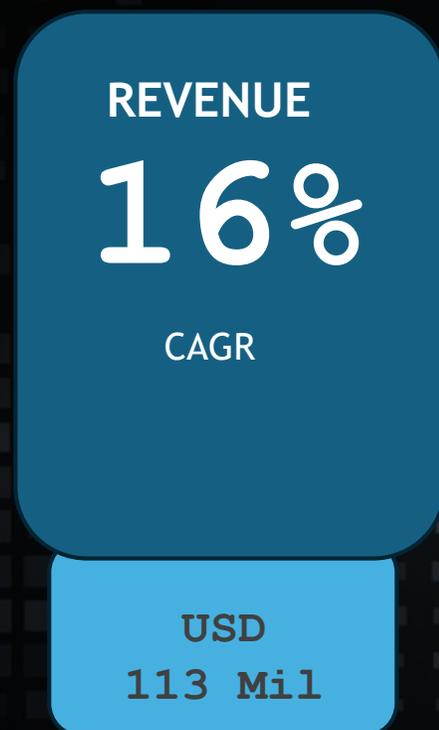


ICT SERVICES: KEY FACTS

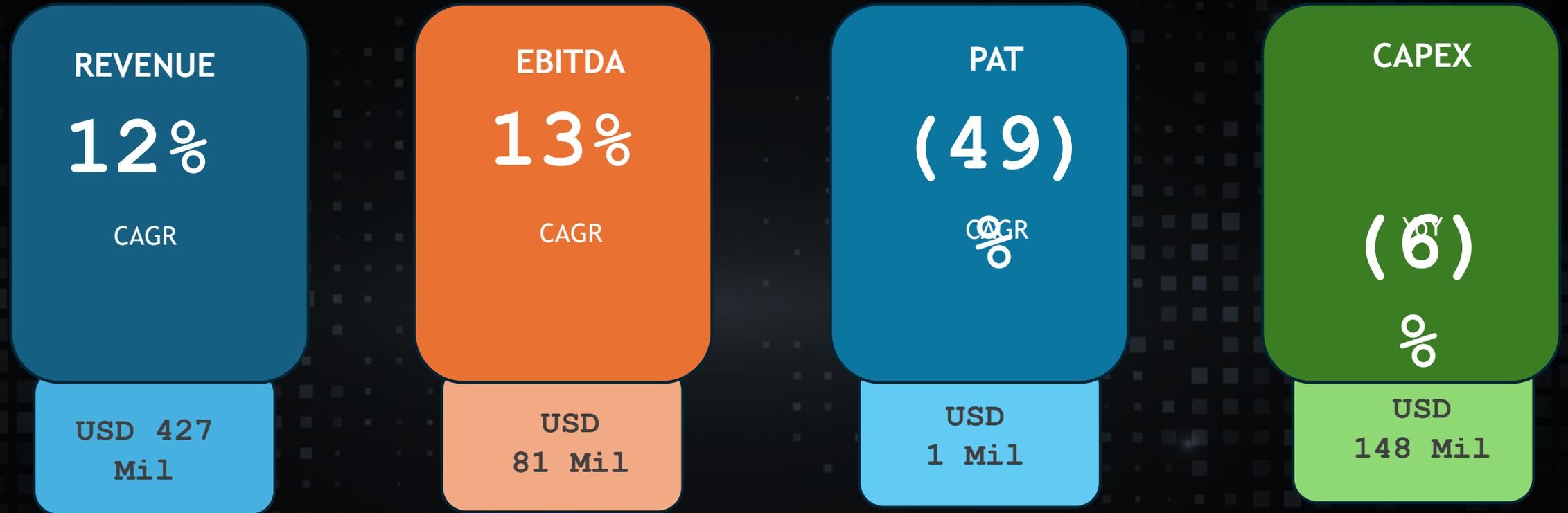


2 PERFORMANCE

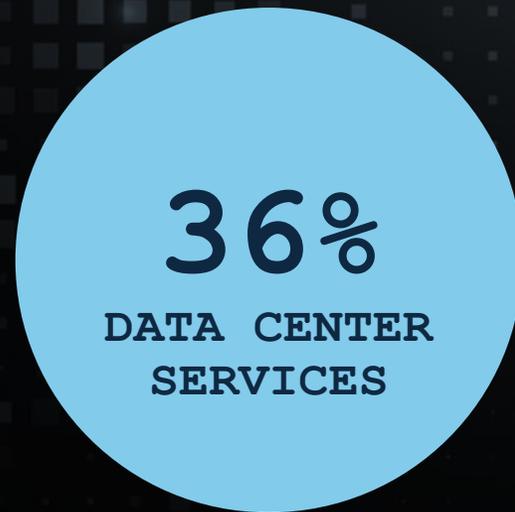
FINANCIAL METRICS – Q1 LAST 5 YEARS



FINANCIAL METRICS – LAST 5 YEARS

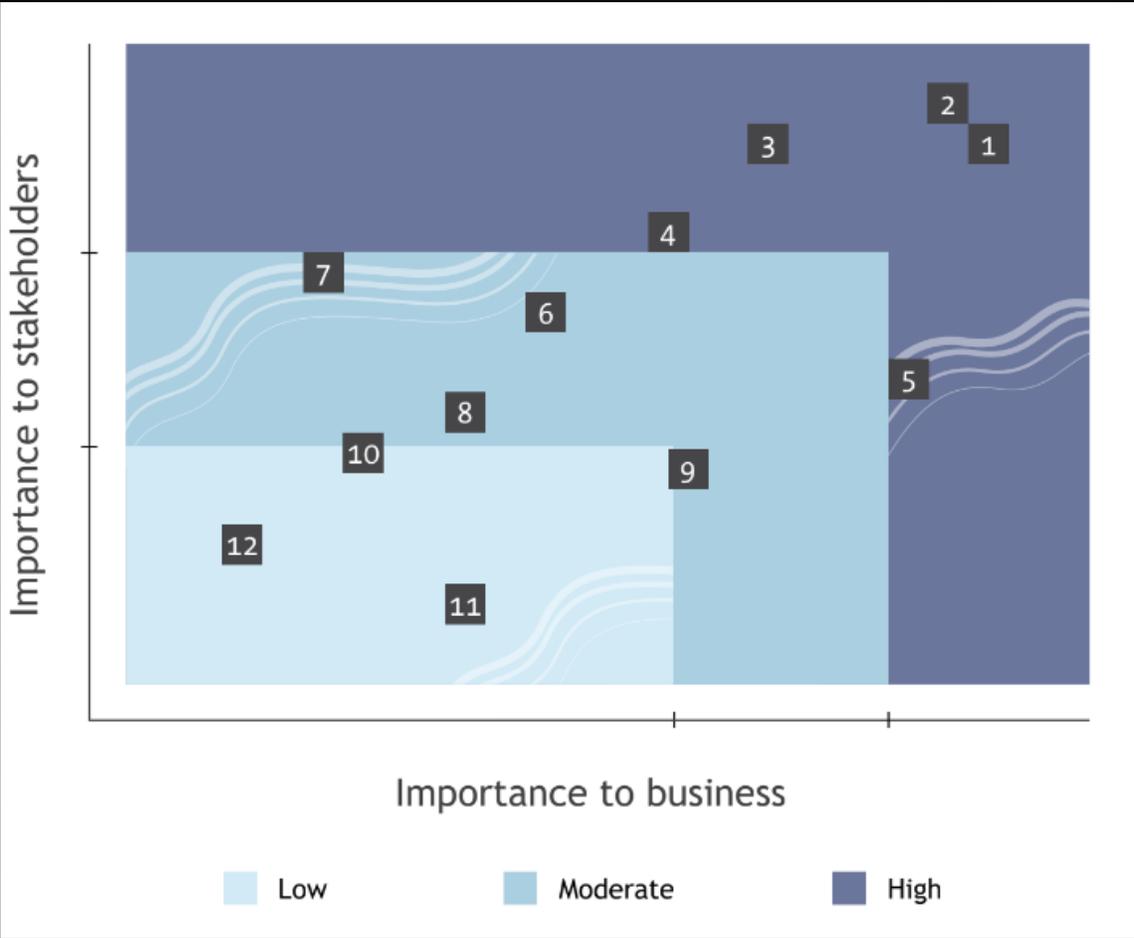


REVENUE SHARE – 3 BUSINESSES



3 SUSTAINABILITY

ESG AND MATERIALITY MATRIX

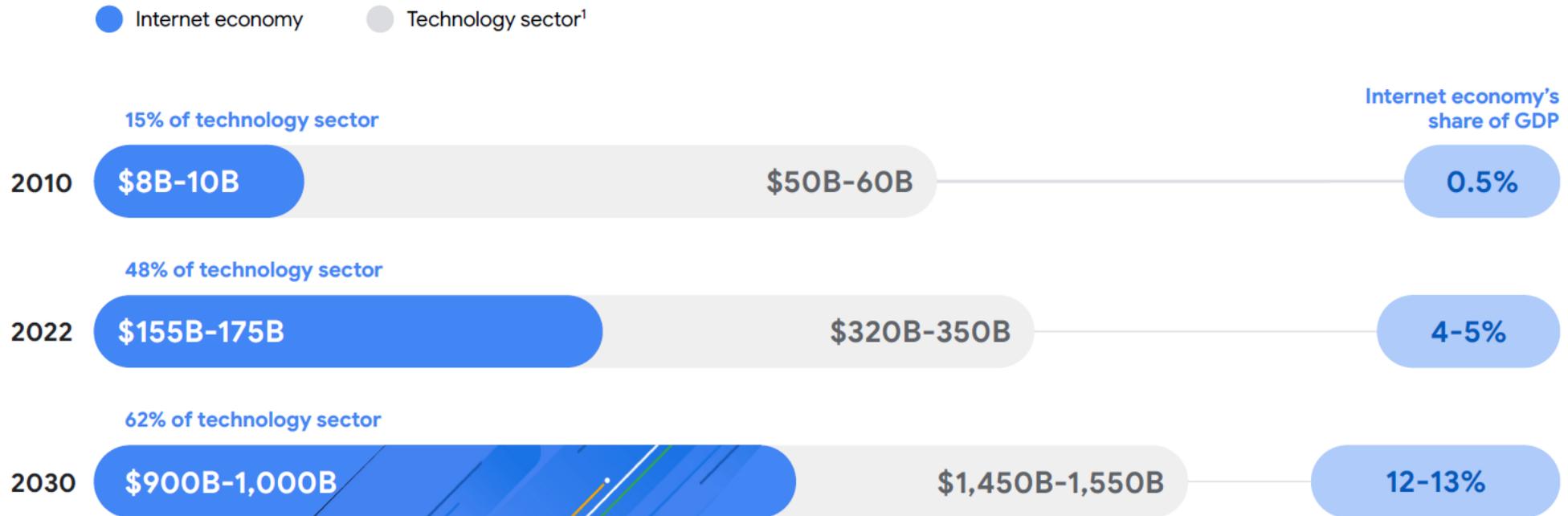


Sify's material topics	UN SDGs impacted
1 Customer delight	8, 9
2 Data privacy & IT security	9, 11
3 Regulatory & compliance	16, 17
4 Business ethics	12, 16, 17
5 Product innovation	9, 11, 12
6 Employee engagement	3, 8, 10
7 Energy efficiency & management	7, 9, 12, 13
8 Diversity & inclusion	5, 10
9 Procurement & supply chain	9, 17
10 Water management	6, 12, 13
11 GHG emissions	7, 12, 13
12 Community engagement	3, 4

4 MARKET OUTLOOK

SHARE OF DIGITAL WALLET

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

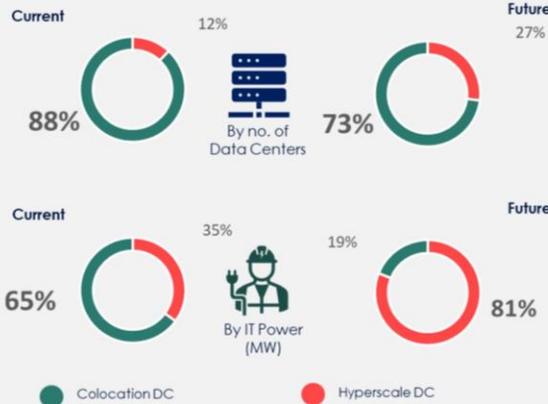


Note: Absolute figures represent consolidated internet economy size across sectors; 1. Technology sector includes information technology (IT), business process management (BPM) and the internet economy.
Source: Bain analysis.

DATA CENTER RUNWAY



Demographic Spread for DCs in India



17

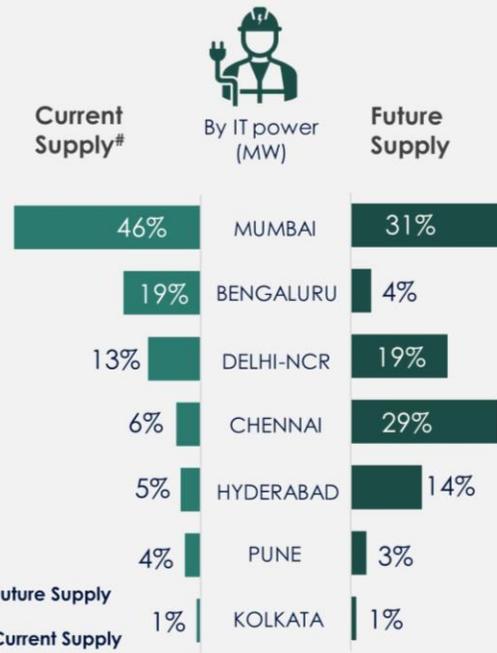
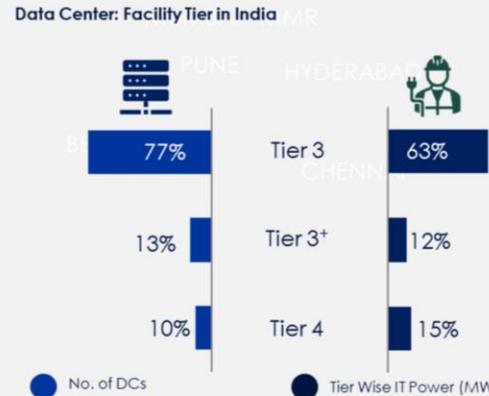
Under-sea cables

29

Landing stations

Mumbai & Chennai

Maximum concentration of landing points



#Current Supply for Tier 2 Cities: 5% of Area (sf) & 6% of IT Power (MW)

NCR Comprises of Noida, Gurugram, Faridabad & Ghaziabad

Source: Eninrac Consulting, Anarock & Channel Checks

INDIAN CLOUD MARKET

\$6.2 Billion

BY Yr 2022

\$17.8 Billion

Estimated Cloud market by Yr 2027

CAGR 23.4%

BY FY 2022-2027

DIGITAL CONSUMPTION

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



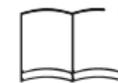
80M

households paid
utility bills online



25M

used online
ride-hailing services



15M

have paid for
an online course

SUSTAINABILITY AMBITIONS

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



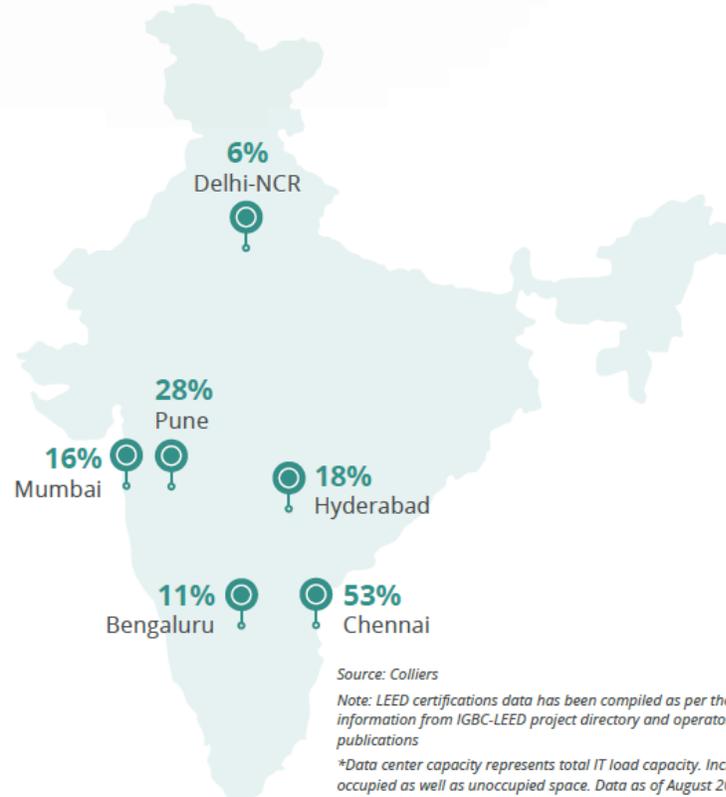
of the current data center capacity in India is LEED certified



Rise in green data center capacity* since 2020 levels



Majority of the data center operators opt for a minimum LEED gold certification



Source: Colliers

Note: LEED certifications data has been compiled as per the available information from IGBC-LEED project directory and operators' annual publications

*Data center capacity represents total IT load capacity. Including occupied as well as unoccupied space. Data as of August 2023

What has been done so far?

- 17-20% reduction in electricity consumption using renewable energy sources from 2020 levels
- 20-25% renewable energy penetration
- 23-25% 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

Thank
You

Great
Place
To
Work®

Certified
APR 2023 – APR 2024
INDIA™

Do you have any questions?

Please write to
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