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
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

India’s trusted Data Center Provider
24 years of experience serving all segments

- 12 Pan-India Data Centers with 100+ MW IT Power
- Adding 350+ MW capacity by 2025
- 200+ MW Renewable energy contracted
- Truly Carrier-Neutral
- Continued investments in automation and smart BMS
- Critical Deployments for Multiple Hyperscalers
- 600+ Premier enterprises hosted in Sify DCs
- Rich Interconnect Ecosystem
- Built to Suit capabilities

Continued investments in automation and smart BMS

200+ MW Renewable energy contracted

Adding 350+ MW capacity by 2025

12 Pan-India Data Centers with 100+ MW IT Power

Critical Deployments for Multiple Hyperscalers

600+ Premier enterprises hosted in Sify DCs

Rich Interconnect Ecosystem

Built to Suit capabilities
**DIGITAL SERVICES – an overview**

<table>
<thead>
<tr>
<th>Customer Experience</th>
<th>Operational Excellence</th>
<th>Data and Analytics</th>
<th>Talent and Culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Digital Asset Management Platform</td>
<td>• Full Stack Observability Platform (FSO)</td>
<td>• Distributed Cloud Intelligent Edge as a Service (DCIEaaS)</td>
<td>• Digital Assessment Platform</td>
</tr>
<tr>
<td>• Digital Distributor Management Platform</td>
<td>• AllOps Automation Platform (AOAP)</td>
<td>• Sify Industrial Application Platforms – SAP</td>
<td>ORACLE</td>
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</tbody>
</table>

**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

Single partner for Managed Services across DC/Cloud/NoC/SoC/EUS/Non-IT

Catalogue Driven & Optimized Hybrid delivery model

Best of Breed MSP Tools, Proactive monitoring, Single Pane of Glass

Full suite of ITIL service elements, process compliance

Partner to address future Transformation initiatives

Productivity improvement with Automation and Event co-relation

SLA based service with real time measurement & dashboards
GLOBAL PRESENCE

- 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

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

Digital Transformation

- Matured Delivery for Cloud, Network, Infrastructure and Application Managed Services and Migrations
- Trusted Hybrid Cloud Advisor: Support choice of deployments
- Network Services: SDN based self-service access to Cloud and DCs
- Single Vendor for end-to-end Uptime SLA


Integrated play across Network, Data Center, Cloud Applications and Security towards Digital Transformation

Digital Services: Implementation and Conversion towards Application Modernization
# ICT SERVICES: KEY FACTS

<table>
<thead>
<tr>
<th>PEOPLE</th>
<th>CUSTOMERS</th>
<th>PROJECTS</th>
<th>VOLUME</th>
</tr>
</thead>
<tbody>
<tr>
<td>700+ DC, Cloud &amp; Managed Services Team</td>
<td>500+ Cloud clients</td>
<td>50+ IT Ops Transformation projects</td>
<td>22K+ Managed Tickets per Month</td>
</tr>
<tr>
<td>900+ Network Experts</td>
<td>500+ Data Center Clients</td>
<td>500+ Data Center services projects</td>
<td>100K+ Network Devices</td>
</tr>
<tr>
<td>100+ Certified Security Experts</td>
<td>700+ Network Clients</td>
<td>300+ Data Center Migration projects</td>
<td>91k+ Managed Mailbox</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>5000+ Security Devices</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>7 Petabyte Managed Storage and Back-up</td>
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<tr>
<td>Global Presence: India (HQ)</td>
<td>USA</td>
<td>UK</td>
<td>UAE</td>
</tr>
<tr>
<td>50+ CDN &amp; Cloud Security clients</td>
<td>70+ Private Cloud &amp; DR clients</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **700+** People
- **500+** Customers
- **50+** Projects
- **22K+** Volume
2 PERFORMANCE
FINANCIAL METRICS – Q1 LAST 5 YEARS

**REVENUE**
16% CAGR
USD 113 Mil

**EBITDA**
12% CAGR
USD 21 Mil

**CAPEX**
85% YoY
USD 32 Mil

In $ MN in constant currency 1 USD @ INR 83.4534 (June 30, 2024) (Unaudited)
FINANCIAL METRICS – LAST 5 YEARS

<table>
<thead>
<tr>
<th>Metric</th>
<th>5-Year CAGR</th>
<th>Value (in USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>12%</td>
<td>427 Mil</td>
</tr>
<tr>
<td>EBITDA</td>
<td>13%</td>
<td>81 Mil</td>
</tr>
<tr>
<td>PAT</td>
<td>(49)</td>
<td>1 Mil</td>
</tr>
<tr>
<td>CAPEX</td>
<td>(6)%</td>
<td>148 Mil</td>
</tr>
</tbody>
</table>

In $ MN in constant currency 1 USD @ INR 83.4534 (June 30, 2024) (Unaudited)
REVENUE SHARE – 3 BUSINESSES

36% DATA CENTER SERVICES
41% NETWORK SERVICES
23% DIGITAL SERVICES
3 SUSTAINABILITY
MARKET OUTLOOK
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.
DATA CENTER RUNWAY

Demographic Spread for DCs in India

Key Location

17 Under-sea cables
29 Landing stations

Mumbai & Chennai
Maximum concentration of landing points

Current Supply

By no. of Data Centers

88%

By IT Power (MW)

73%

Future Supply

27%

Current Supply

65%

By area (sq ft)

35%

Future Supply

10%

Data Center: Facility Tier in India

Tier 3

Tier 3*

Tier 4

No. of DCs

Tier Wise IT Power (MW)

Future Supply

Future Supply

Current Supply

Current Supply

KOLKATA

DELHI-NCR

Mumbai

Bengaluru

Hyderabad

Pune

Chennai

5%

1%

12%

13%

6%

3%

14%

18%

18%

77%

63%

13%

12%

13%

5%

15%

1%

4%

46%

4%

19%

6%

29%

14%

3%

31%

4%

19%

19%

29%

14%

3%

1%

1%

Source: Enirac Consulting, Anarock & Channel Checks

*Current Supply for Tier 2 Cities: 5% of Area (sq ft), 6% of IT Power (MW)

NCR Comprises of Noida, Gurugram, Faridabad & Ghaziabad
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 adoption has now reached the tipping point across most sectors in India’s internet economy.

- 220M people have shopped online.
- 110M people have made purchases in online games.
- 65M people have ordered food online.
- 80M households have paid utility bills online.
- 25M people have used online ride-hailing services.
- 15M people have paid for an online course.
SUSTAINABILITY AMBITIONS

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

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 10% 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

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

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

Source: Colliers
Note: LEED certifications data has been compiled as per the available information from GSC-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
Thank You

Do you have any questions?

Please write to praveen.krishna@sifycorp.com