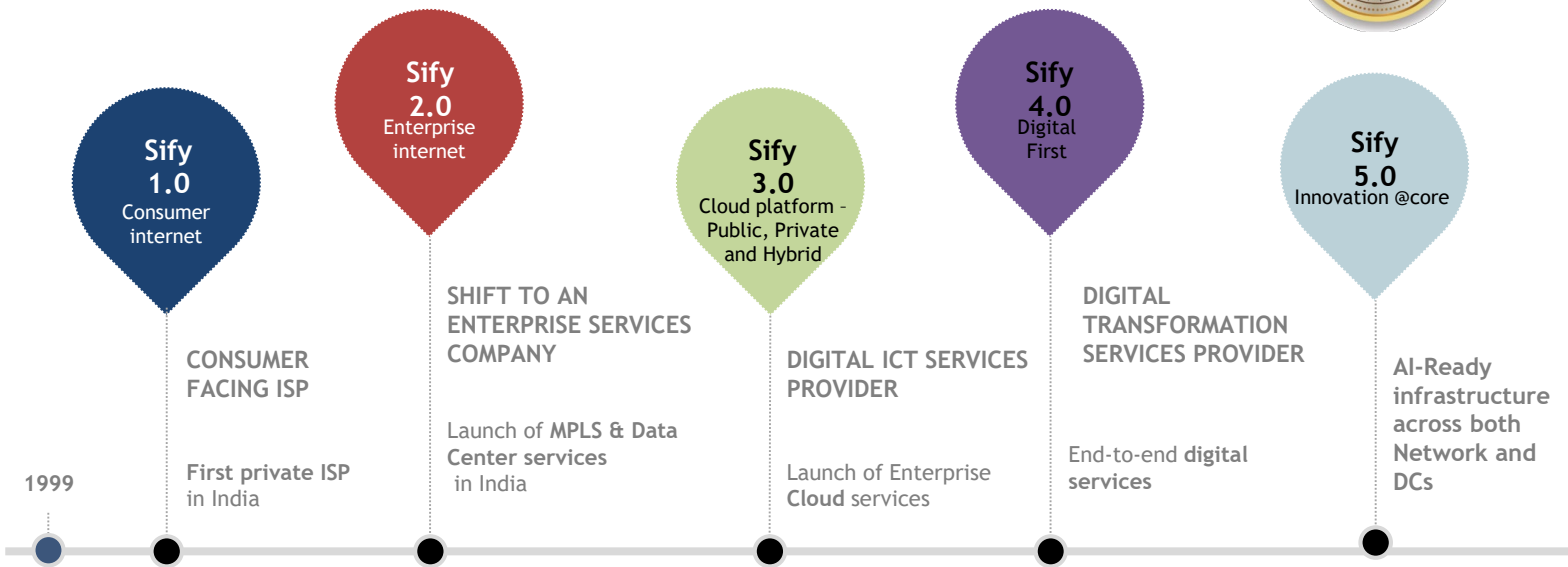
INVESTOR PRESENTATION

ANNUAL 2024-25

July 2025

JOURNEY SO FAR | GROUP

DIGITAL TRANSFORMATION THROUGH THE YEARS



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

STRUCTURE & SERVICE OFFERINGS | GROUP

Sify Technologies Limited

Parent Company

Sify Infinit Spaces Limited

Wholly-Owned Subsidiary

Sify Digital Services Limited

Wholly-Owned Subsidiary

Network Connectivity Services

Data Center Colo Services

Network Digital Managed Services

CloudInfinit Ent Cloud Infra

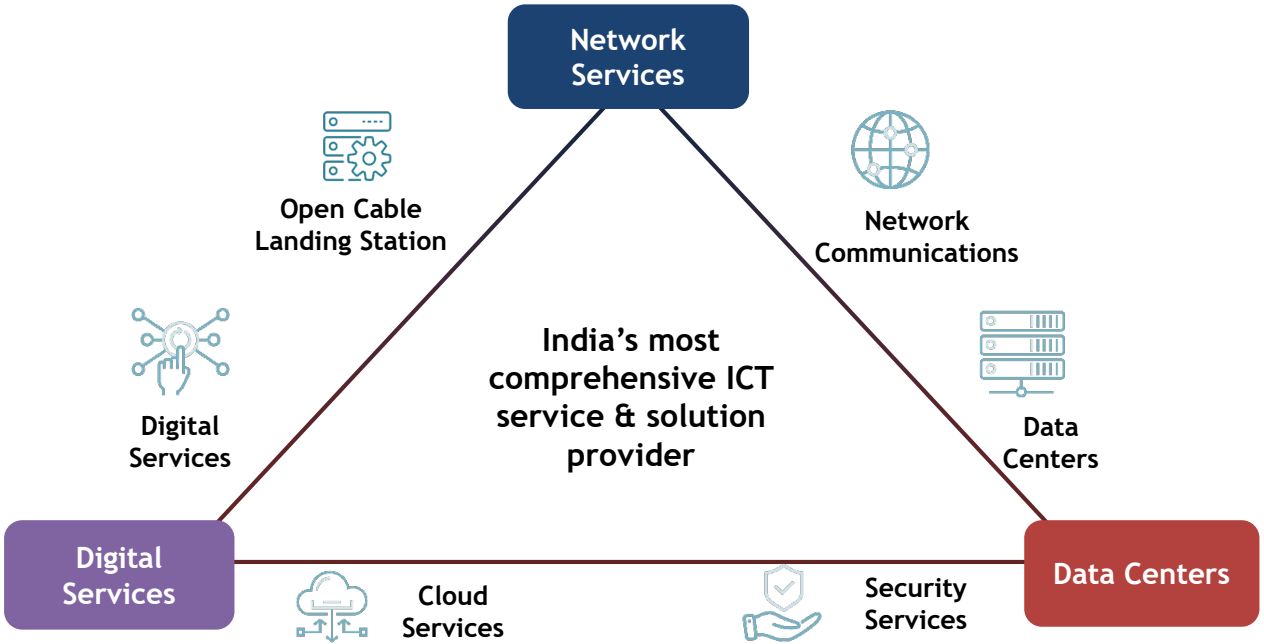
Cloud & IT Managed Services

Digital Apps Managed Services

Industry Apps Managed Services

Security Managed Services

ROBUST COMPETITIVE MOAT IN THE FORM OF INTEGRATED OFFERINGS | GROUP



10,000+ clients consume Sify's trinity of Data Centers, Networks and Digital Services

NETWORK SERVICES | SIFY TECHNOLOGIES

Sify Confidential

NETWORK CONNECTIVITY SERVICES OVERVIEW | SIFY TECHNOLOGIES

Nx 400G Metro Networks
112,564 kms of Sify dark fiber
SDN networks in over 700+ buildings

Wide footprint of Data Center interconnect services across 70+ DCs & Cloud connects

Leveraging **Sify's MPLS** covering **3,700+ PoPs** across **1700+** cities across India, 100 Network to Network Interconnects

Metro CrossConnect with pre-built **1G/10G/100G** bandwidth, offering guaranteed availability and protection with **sub-50mn switching between data centers**

Attractive value proposition for **hyperscalers** and nationwide **enterprise** in India

Express Long-Haul Backbone
High bandwidth and Low Latency Across Key Locations - 6500+ kms in use and 12,000 kms under construction

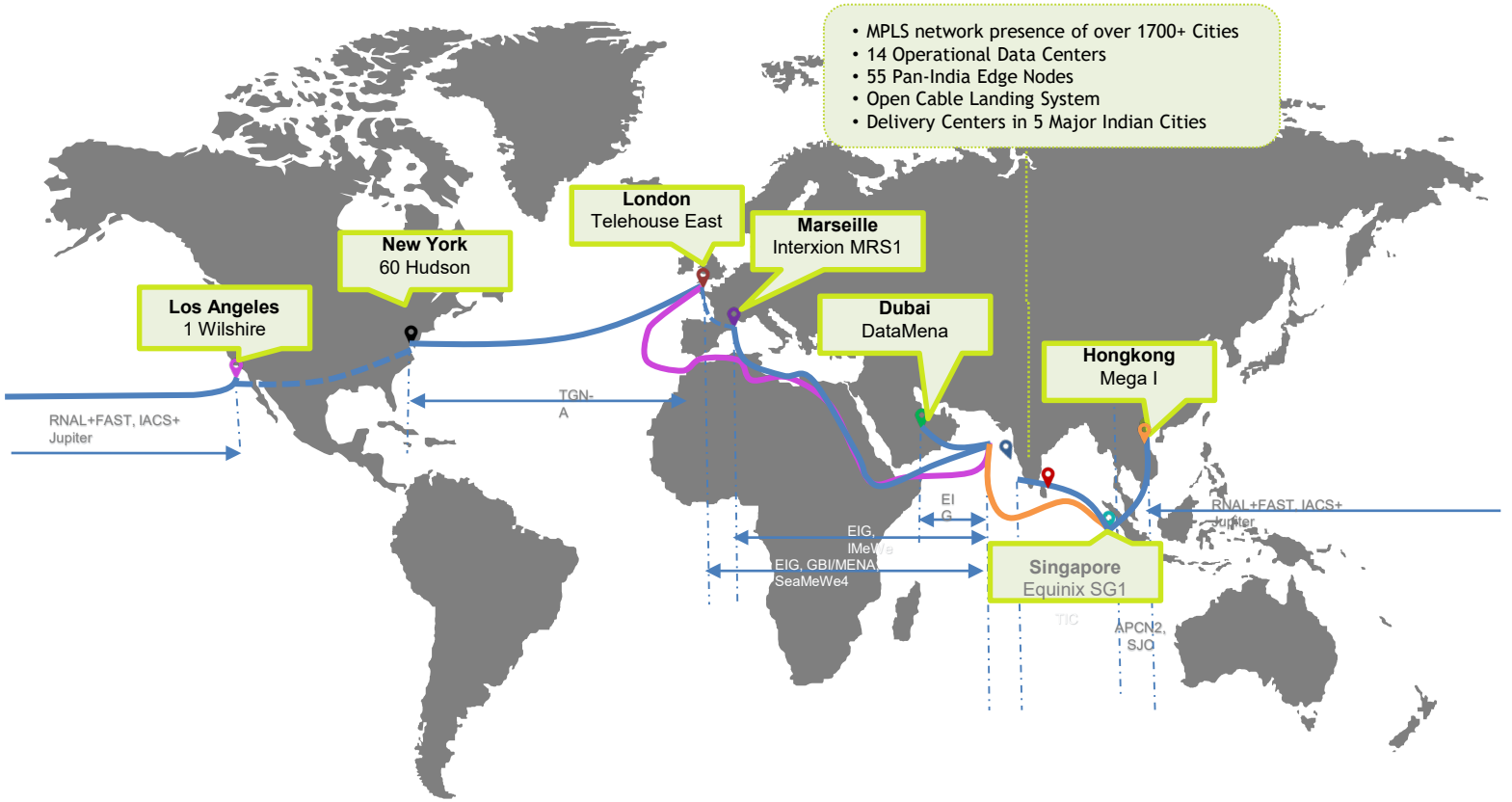
Value Proposition

One of the world's most extensive interconnect networks connecting users and customer locations across the globe

Largest MPLS enabled network in India, enabling seamless transportation of huge data traffic

Extensive network supporting transformation of business into a fully digitized operation, and providing bandwidth services to enterprises, content providers, over- the-top (OTT) providers, and other network operators with speeds up to 100 GBPS pan-India

NETWORK OVERVIEW & INTERNATIONAL PRESENCE | SIFY TECHNOLOGIES



DATA CENTER COLOCATION SERVICES | SIFY INFINIT SPACES

Data Center Colocation Services | SIFY INFINIT SPACES

India's trusted Data Center Provider with rich multi-decadal experience

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

2+ Decades of 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
- HSE certified ISO 45001:2018

Future-ready Data centers

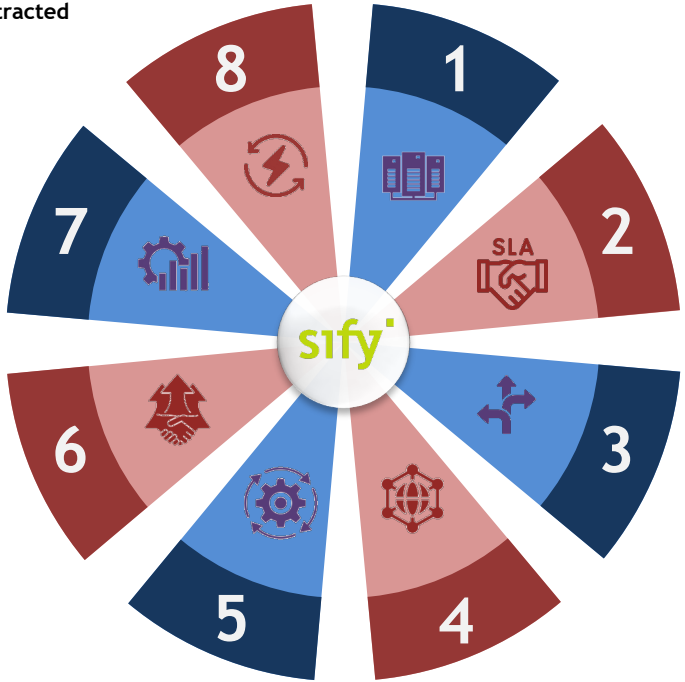
- Next Gen Data center design
- ML/AI platform enabling faster decision-making
- AI for Operational efficiency monitoring and automated reporting
- ~37.4% Operational green Power
- AI workloads up to 130 KW/rack

Trusted Partner

- Reliability of services
- Flexible for customer requirements
- Scalable for future business growth
- Continuous scaling of engagement with no churn

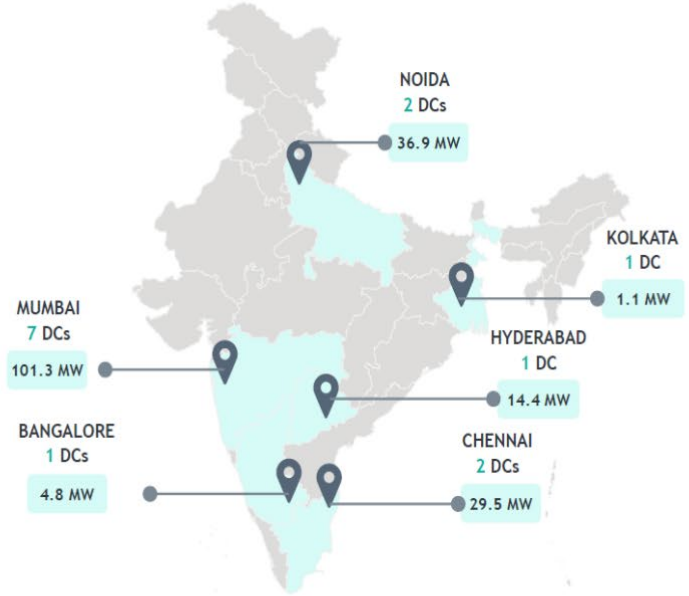
KEY HIGHLIGHTS | SIFY INFINIT SPACES

1. 14 Pan-India Data centers with ~200 MW IT power
2. Strong SLA with Operational and maintenance skill set
3. Truly Carrier-Neutral 90% of fiber links from non-Sify operators
4. Hyperconnected and Rich Interconnected Ecosystem
5. Continued investments in automation and smart BMS
6. Synergistic services by parent co. (Enterprise telephony, network service provider)
7. Built to Suit capabilities and upcoming Edge capabilities
8. 100+ MW operational out of 300+ MW renewable energy contracted



DATA CENTER INDIA PRESENCE | SIFY INFINIT SPACES

Pan-India DC service provider for hyperscale, enterprise, & mission-critical AI workloads



188 MW
14 current DCs[1]

- **Hyperconnected, carrier-neutral** and rich Interconnect ecosystem
- State-of-the art **hyperscale** data centers
- **Top-tier certifications:** Concurrently maintainable, IGBC Platinum rated, PCI DSS, SOC I, SOC II, ISO 27001
- **POD - based design** for future ready infrastructure
- Enhanced **10 levels of security automation (gate to server)**
- AI/ML led operational excellence with **99.999% uptime**

DIGITAL & CLOUD SERVICES | SIFY DIGITAL

DIGITAL SERVICES OVERVIEW

Network Digital Managed Services

- Network transformation and consolidation
- Managed Secure Networks- SDWAN, SASE, DDOS protect
- Campus & Branch Networks
- Smart Edge
- Captive & Hybrid NOC services
- Network Observability

CloudInfinit+AI GPU Cloud

- Hosted AI Platform (Multi Instance GPU) as a Service
- Managed Public/ Private Cloud
- Cloud Anywhere-Edge Cloud
- BCP- DRaaS
- Regulatory and compliance ready

Cloud & IT Managed Services

- Hybrid Cloud Assessment, Migration and Managed Services
- Multi Cloud Platform
- Hyperscale Cloud services AWS, Azure, GCP, OCI
- End-to-End IT Managed Services

Digital Apps Managed Services

- Infinit Full Stack Observability
- Infinit AI/ML Platform
- App Modernization & DevSecOps
- Retail Intelligence- Forum Digital
- Digital Assessment and XR

Industry Apps Managed Services

- Consulting, Support, Maintenance, and Upgrades
- Microsoft
- Oracle
- SAP

Security Managed Services

- Cybersecurity assessment and managed services
- MSS, MDR & GRC
- Global SOC
- AI/ML driven Security Assurance

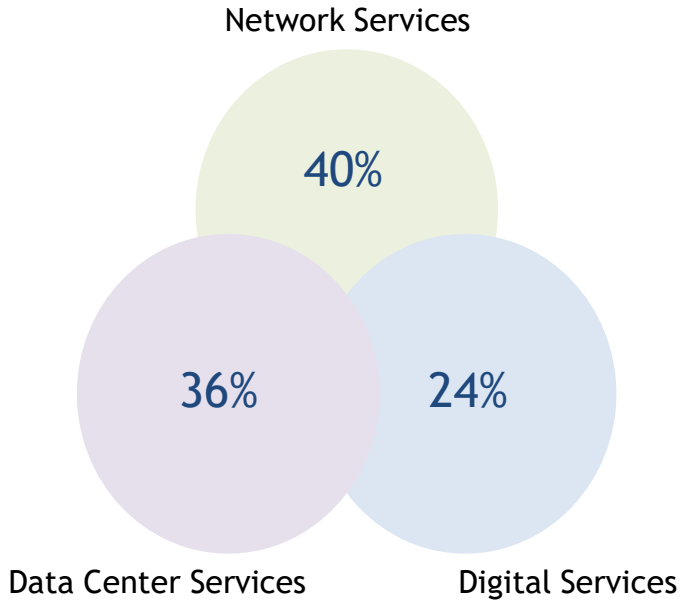
KEY HIGHLIGHTS | SIFY DIGITAL

- Launch GPU Cloud, CloudInfinit+AI Platform offering GPU as a Service, a cloud-based offering that provides users with access to powerful Graphics Processing Units (GPUs) on a pay-as-you-go basis. The service is designed to support compute-intensive tasks such as machine learning, deep learning, model training, inferencing, data analytics, rendering, and scientific simulations, which require significant processing power.
- WAN coverage in 1700 cities SDN powered enterprise network,and Submarine network capacities to Europe, Middle East and SouthEast Asia

GROUP REVENUE

REVENUE | GROUP

Revenue	FY 2024-2025 (USD Million)
Network Services	185.45
Data Center Services	166.81
Digital Services	116.43
Total	468.69



Note: As of 29/03/2025, 1 USD = 85.10 INR
Source: https://mumbaiport.gov.in/show_content.php?lang=1&level=2&ls_id=1342&lid=1067

MARKET OUTLOOK

NETWORK MARKET OUTLOOK

Service Type	2024 Market Size	2030 Forecast	CAGR
Enterprise Network Infrastructure	US $3.02 billion	US $4.95 billion	7.3%
Enterprise Networking (inclusive)	US $16.04 billion	US $22.22 billion	5.4%
Software-Defined Networking (SDN)	US $3.6 billion	US $8.9 billion	16.1%
Network Engineering Services	US $1.84 billion	US $3.71 billion	10.6%
Network-as-a-Service (NaaS)	US $1.7 billion	(India's part of US $14.3 billion global)	26.98% (to 2033)
Cloud Managed Networks	US $1.13 billion	US $2.94 billion	17.4%

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Source:https://www.grandviewresearch.com/horizon/outlook/enterprise-network-infrastructure-market/india

NETWORK MARKET OUTLOOK

Growth Driver	Details & Impact
5G Rollout and Private 5G Networks	The rapid deployment of 5G and industry-specific private networks is driving demand for high-speed, low-latency connectivity solutions.
Cloud Migration & Edge Computing	Enterprises are modernizing their IT infrastructure with cloud-native environments, needing robust and scalable network backbones.
Digital Transformation in Enterprises	Manufacturing, BFSI, healthcare, and retail sectors are digitizing operations, requiring secure and agile network services.
Cybersecurity & SD-WAN Adoption	Increasing cyber risks are pushing demand for secure networking (e.g., SASE, SD-WAN), fueling premium network services.
Growing Data Consumption & IoT Devices	Surge in data usage (video, streaming, remote work) and proliferation of IoT devices are stressing traditional networks, triggering upgradation.
Smart Cities and Public Infrastructure Projects	Government-led smart city and infrastructure projects are expanding the scope for fiber, wireless, and last-mile network deployments.
Partnerships with Hyperscalers	Collaborations between telcos and cloud giants (AWS, Azure, Google Cloud) are redefining enterprise network models and driving demand.
SME & MSME Digitization Push	Government incentives and increased awareness are encouraging smaller businesses to adopt managed network and internet services.
Tier-II & III City Penetration	Expanding digital access beyond metros is creating new demand for reliable enterprise and retail-grade network services.

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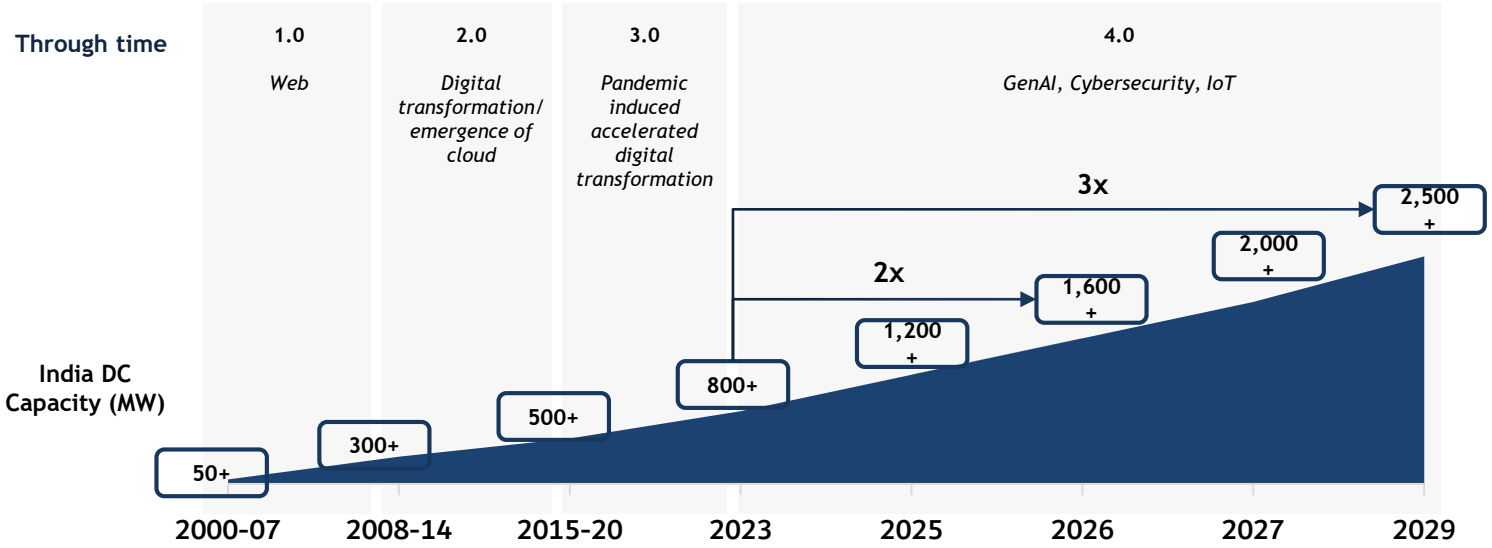
KEY DRIVERS |DATA CENTER MARKET OUTLOOK



By technology

- 2G rollout
- 3G rollout
- 4G rollout
- Rise of Internet
- Rapid Smartphone adoption
- Sharp reduction in data prices

- Artificial Intelligence
- Increasing digitalization
- Cybersecurity
- Accelerated adoption of cloud
- Roll-out of 5G & increased bandwidth
- IOT

Source: Kotak Research

DATA CENTER MARKET OUTLOOK

Growth Driver	Description
Rising Demand for Hyperscale Infrastructure	Cloud providers, OTT platforms, and AI firms need large-scale, energy-efficient data centers with massive compute and storage capacity.
Power and Sustainability Mandates	Increasing focus on green data centers, RE sourcing, and energy-efficient cooling drives modernization and investment.
Data Sovereignty Regulations	Compliance with India's data localization laws is prompting global firms to host data within Indian borders.
5G, IoT, and Edge Computing Integration	New applications need low-latency edge nodes, spurring demand for smaller, distributed data centers.
AI & Machine Learning Workloads	Accelerated compute needs (e.g., GPUs for AI/ML) are pushing demand for scalable, high-density infrastructure.
Enterprise Cloud and SaaS Adoption	Enterprises are moving workloads off-prem to colocation or hybrid cloud environments, driving B2B colocation demand.
Infrastructure Investments and REITs	Favorable government policies, DC parks (e.g., Tamil Nadu, UP), and REIT structures are attracting foreign and domestic investors.
Make-in-India & Digital India Push	National programs encouraging digital infrastructure are reinforcing the demand for local data storage and processing capabilities.

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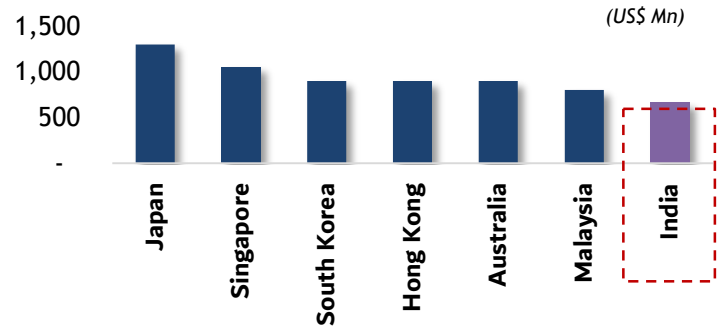
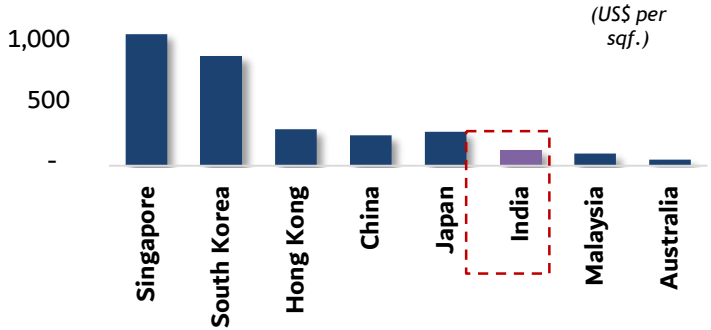
India is on track to contribute 25% of the development pipeline in APAC...

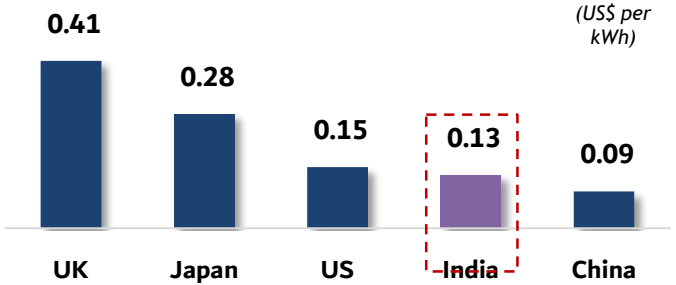
Lowest construction cost for a 100 MW data center



One of the lowest land costs in the region and...



India has one of the lowest power cost among developed countries...



Source: CLSA Research

India is expected to become one of the largest datacenter markets in APAC due to competitive land, construction and power costs

INDIA DIGITAL, CLOUD, AND APP-BASED SERVICES MARKET OUTLOOK

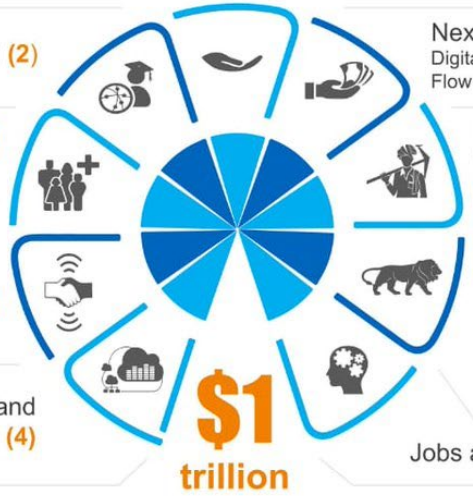
Segment	2024 Market Size	2030 Forecast	CAGR (2024-2030)
Total Cloud Computing	USD 17.88 billion	USD 76.39 billion	26.5%
Public Cloud Services	USD 8.11 billion (2023 est.)	USD 20.17 billion	13.9%
Infrastructure as a Service (IaaS)	USD 23.91 billion (2024 est.)	USD 76.81 billion	21.3%
Cloud-Native Applications	USD 351.4 million	USD 1,593.6 million	29.1%
Digital Transformation	USD 124.4 billion (2025)	USD 267.0 billion	16.5%

Source: https://www.grandviewresearch.com/industry-analysis/india-cloud-computing-market
https://www.grandviewresearch.com/horizon/outlook/public-cloud-market/india
https://www.globenewswire.com/news-release/2025/03/07/3038863/28124/en/India-s-Cloud-IaaS-Market-to-Triple-by-2030.html
https://www.grandviewresearch.com/horizon/outlook/cloud-native-applications-market/india
https://www.mordorintelligence.com/industry-reports/india-digital-transformation-market

INDIA DIGITAL, CLOUD, AND APP-BASED SERVICES MARKET OUTLOOK

Thirty digital themes, across nine national priority areas, have the potential to create $1 trillion of economic value by 2025 for India

(XX) Number of identified themes per priority area



Energy for all (2)

Quality education for all (2)

Health care for all (3)
Universal health record for every Indian
Universal public health insurance platform
Tech enabled health delivery

E-governance of the future (6)

21st century IT infrastructure and software capabilities (4)

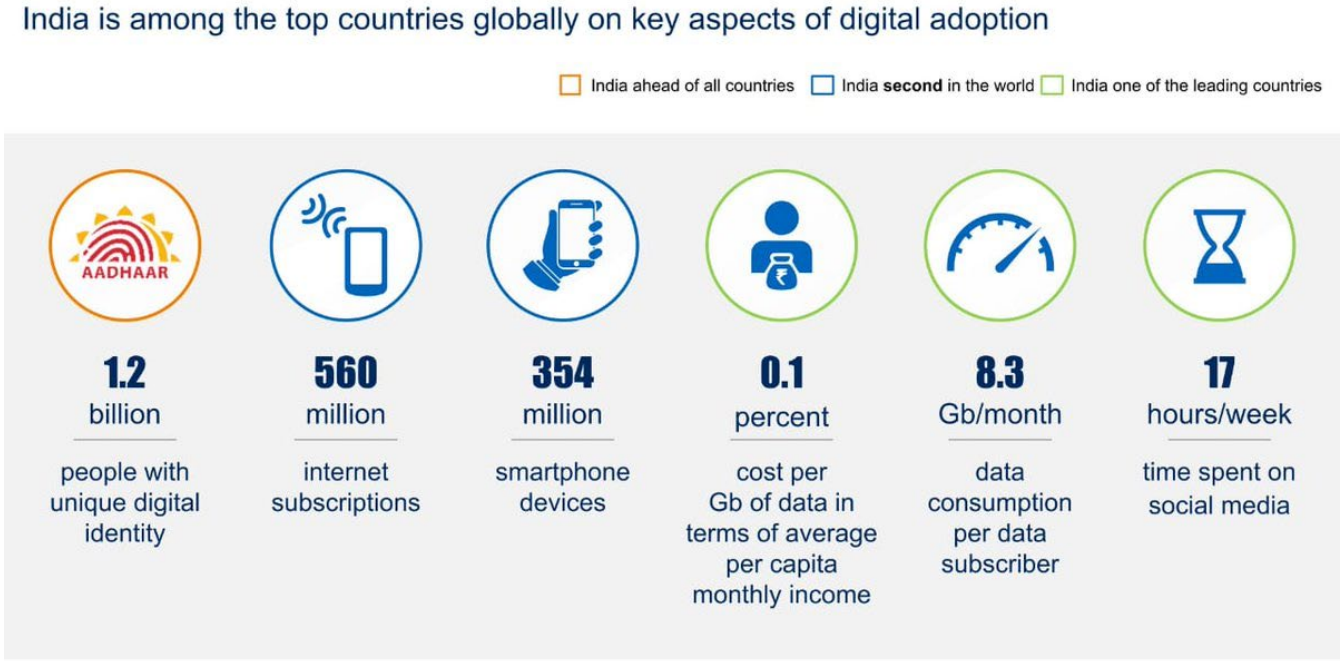
Next generation financial services (2)
Digital payments
Flow based lending and advanced credit underwriting

Doubling farmers' income (3)
Digital farmer financing and insurance payouts
Precision agriculture knowhow to every farmer
Universal online agricultural marketplace

Make in India, Make for India, Make for the world (5)
End-to-end digital supply chains
Integrated logistics platform
Platforms for ride-hailing
IoT-based advanced analytics and automation
Electronics manufacturing and exports from India

Jobs and skills for the future (3)

INDIA DIGITAL, CLOUD, AND APP-BASED SERVICES MARKET OUTLOOK



INDIA DIGITAL, CLOUD, AND APP-BASED SERVICES MARKET OUTLOOK

Growth Driver	Description
Digital-First Consumer Behavior	Widespread smartphone usage and internet penetration are fueling demand for mobile-first apps and platforms.
Cloud-Native IT Transformation	Businesses are moving to microservices and DevOps, needing SaaS, PaaS, IaaS for speed and scalability.
Start-up and MSME Digitization	Affordable cloud-based tools are enabling Indian SMEs to modernize without capex-heavy infrastructure.
AI, Analytics & Automation Use Cases	Digital services are embedding AI-driven insights, requiring scalable cloud architecture and rapid application deployment.
E-Governance & Sectoral Digitization	Health, education, public welfare, and agriculture sectors are increasingly using cloud-native and app-based delivery models.
Focus on Security & Compliance	Increased cyberattacks have led to demand for secure cloud deployments with robust identity, encryption, and audit capabilities.
Rise of Digital Workplaces & Hybrid Models	The hybrid work culture is sustaining demand for collaborative tools, remote infrastructure management, and virtual desktops.
Global Cloud Provider Expansion in India	Entry and expansion of AWS, Azure, GCP, and Oracle Cloud have expanded access and lowered costs for Indian businesses.

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AWARDS AND CERTIFICATIONS | GROUP

Corporate Governance

Golden peacock award by Institute of Directors 2014 and 2024

Madras Management Association Award for Managerial Excellence 2024

Integrated Reporting

Integrated Report Gold at LACP awards 2023 - 2024

Integrated Report Platinum at MarCom awards 2024 - 2025

Sustainability

ET times Now Sustainability awards 2024

Partner Recognitions

Best Service Provider by ICICI Prudential Life Insurance at TATVA Annual Awards 2024

Cloud Service Provider of the Year - India by Hitachi Vantara 2023

Best System Integrator 2022

Cisco SPaaCH Partner of the Year FY'22 in Service Provider Partner category

Industry Recognitions

Top 50 in Fortune India's "The Next 500"

Best Enterprise Data Center by The Economic Times

Data Center, Cloud & Managed Services

IT Service Management

India's 1st Nvidia DGX Ready Liquid Cooled 130/KW/rack DC since 2024

PCI DSS

SOC 1 Type II

SOC 2 Type II

Tried. Tested. Trusted.

Your digital infrastructure partner for over 25 years

Thank You

For any queries please write to
Praveen.krishna@sifycorp.com