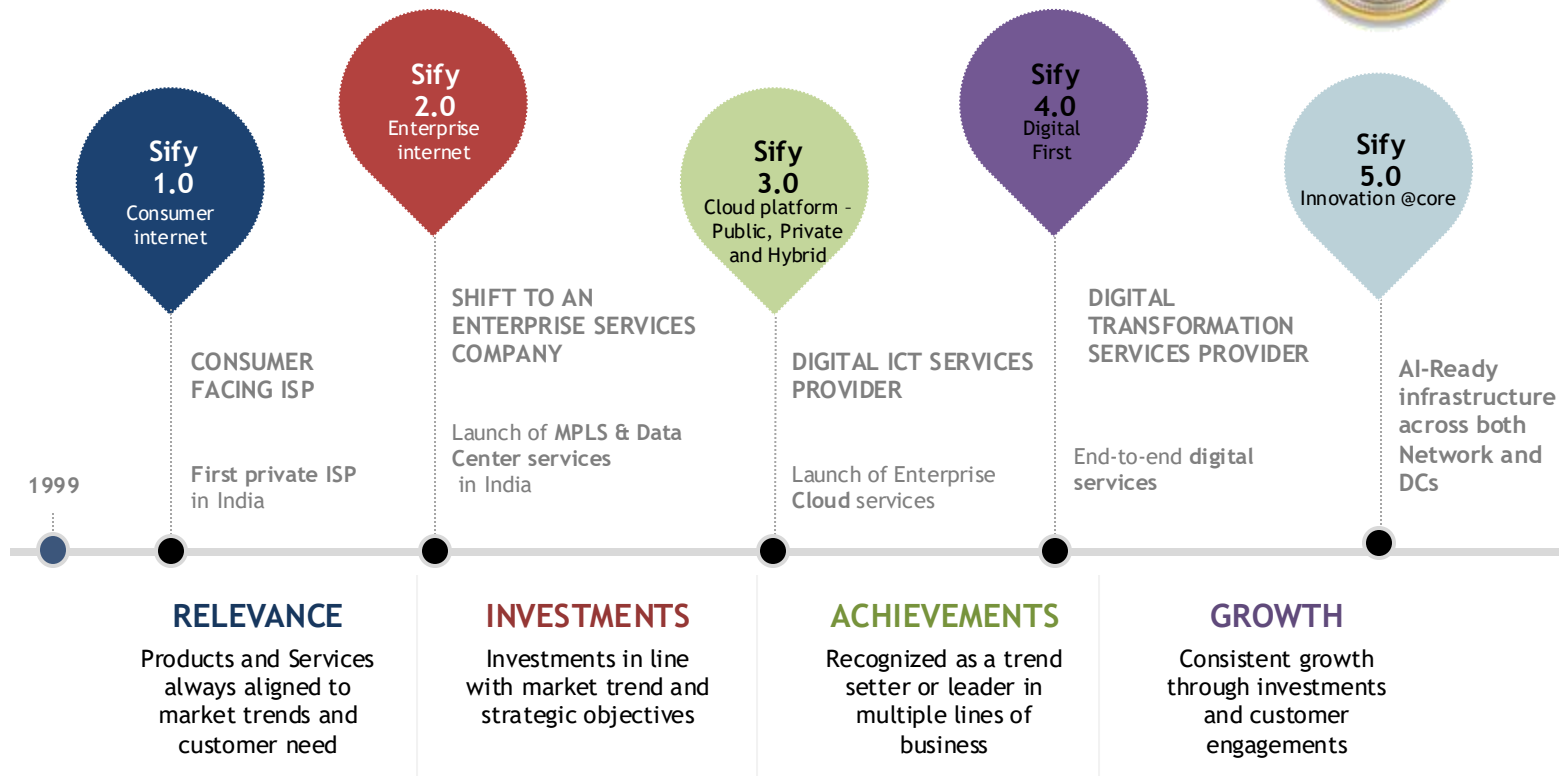


INVESTOR PRESENTATION

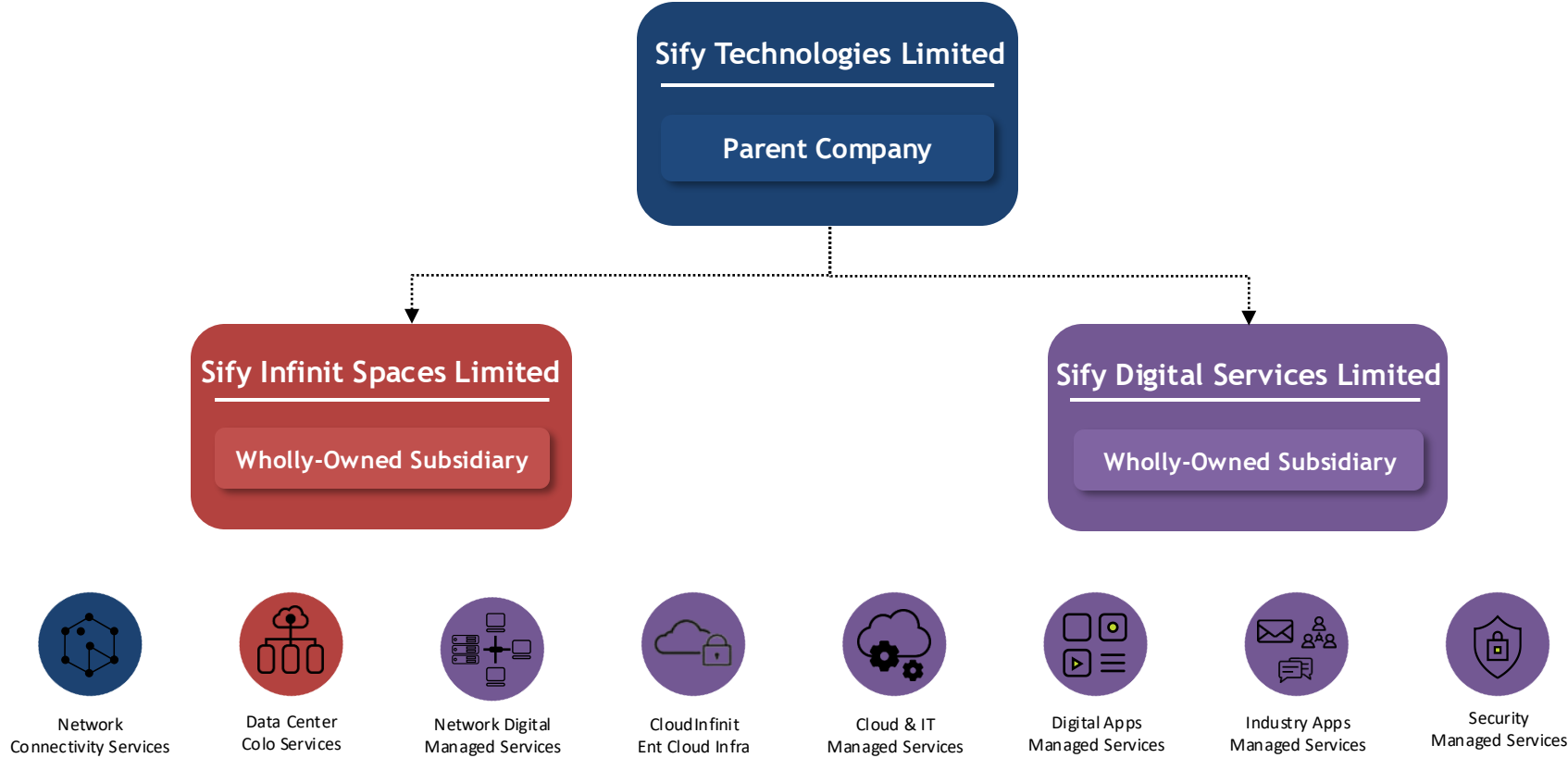
ANNUAL 2024-25

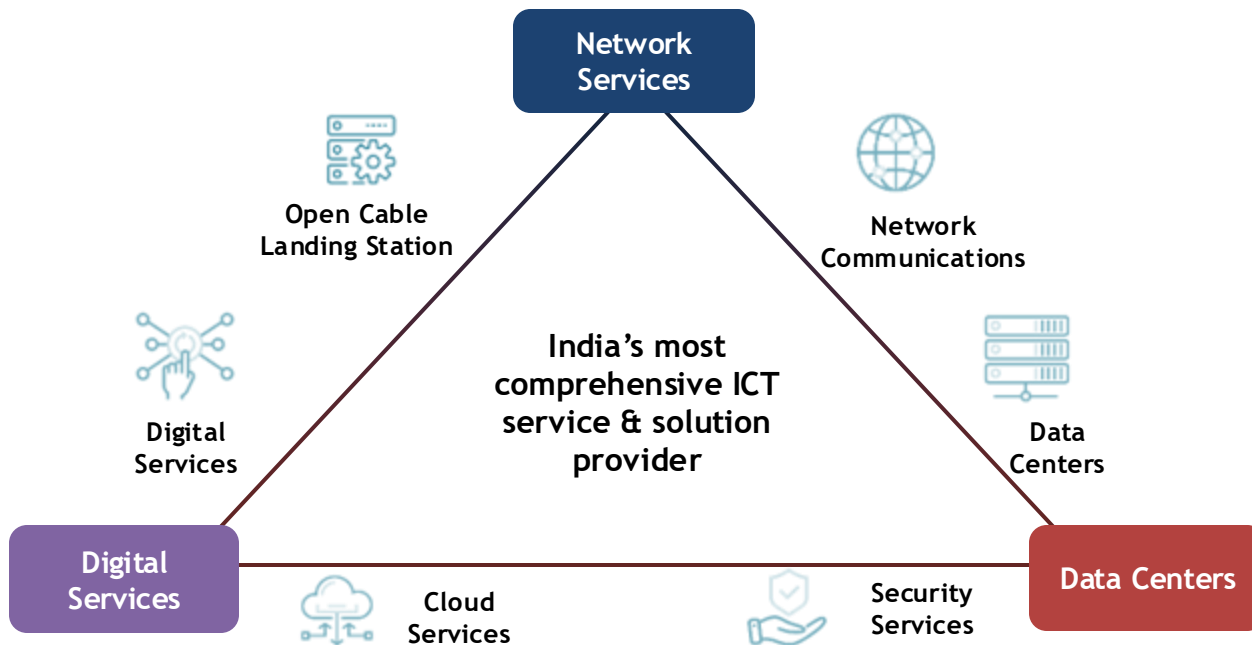
July 2025

DIGITAL TRANSFORMATION THROUGH THE YEARS



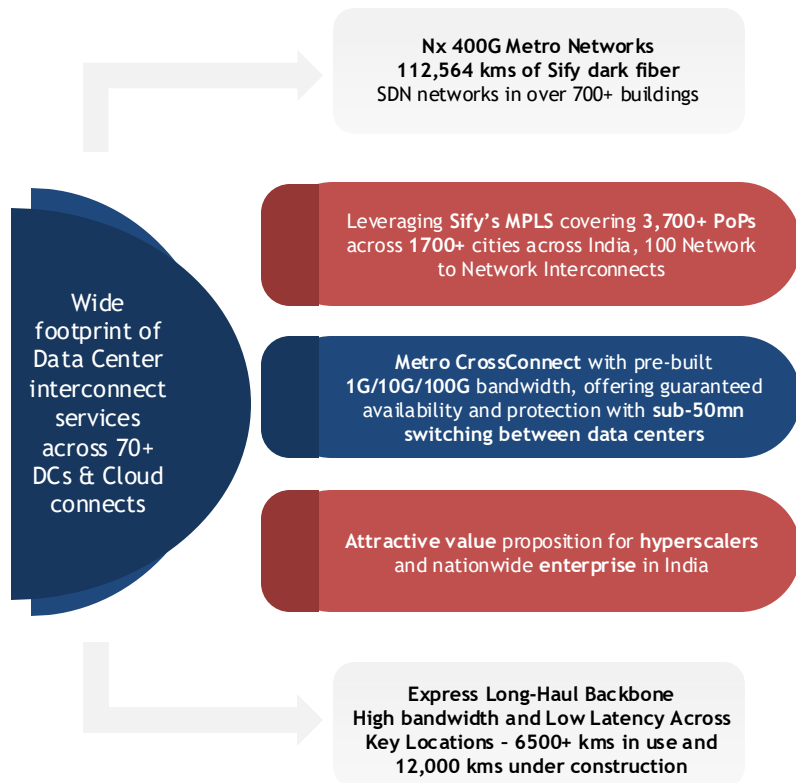
GROUP COMPANIES





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

NETWORK SERVICES | SIFY TECHNOLOGIES



Value Proposition

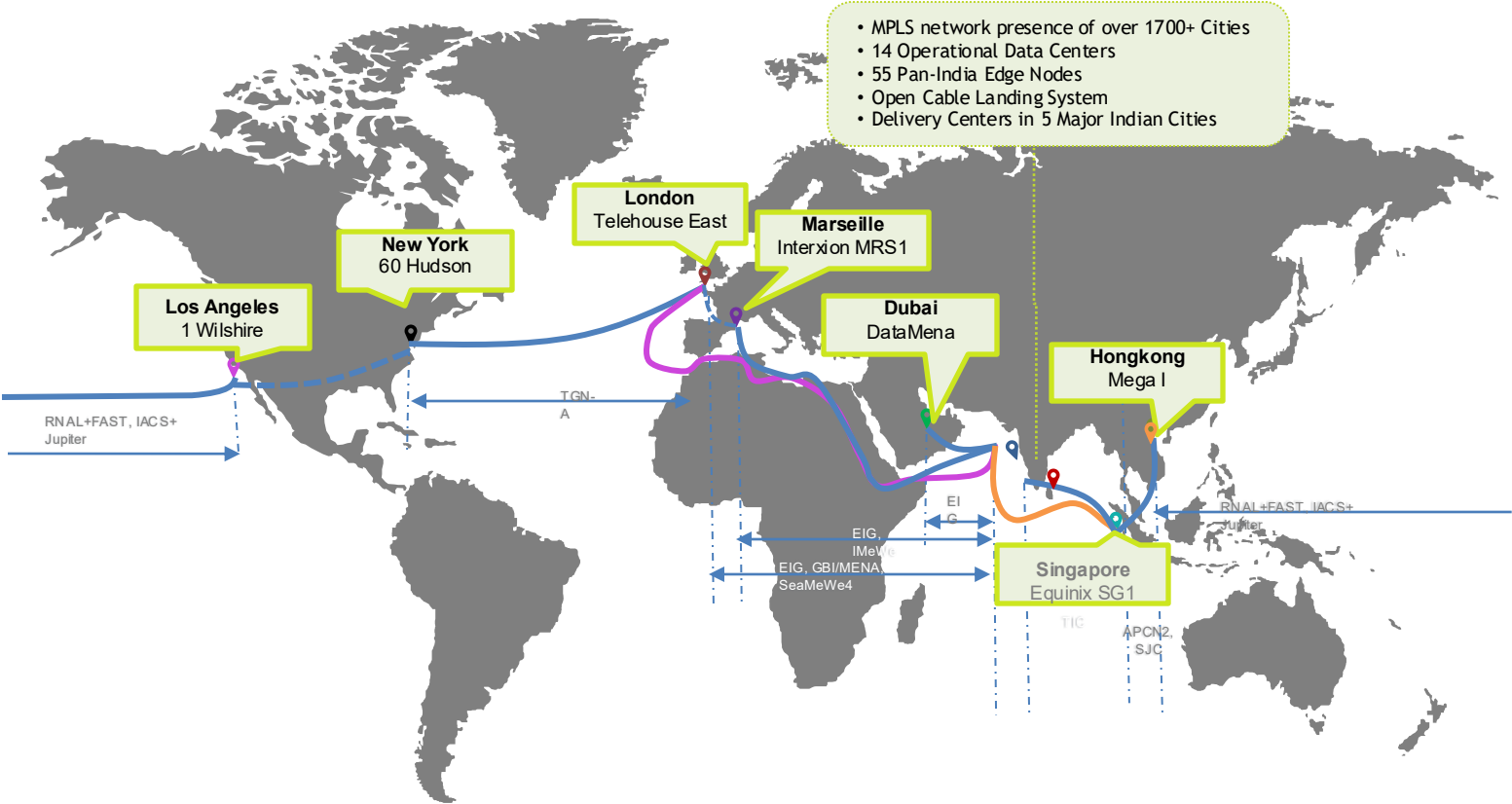
One of the world's most extensive interconnect networks connecting users and customer locations across the globe



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



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



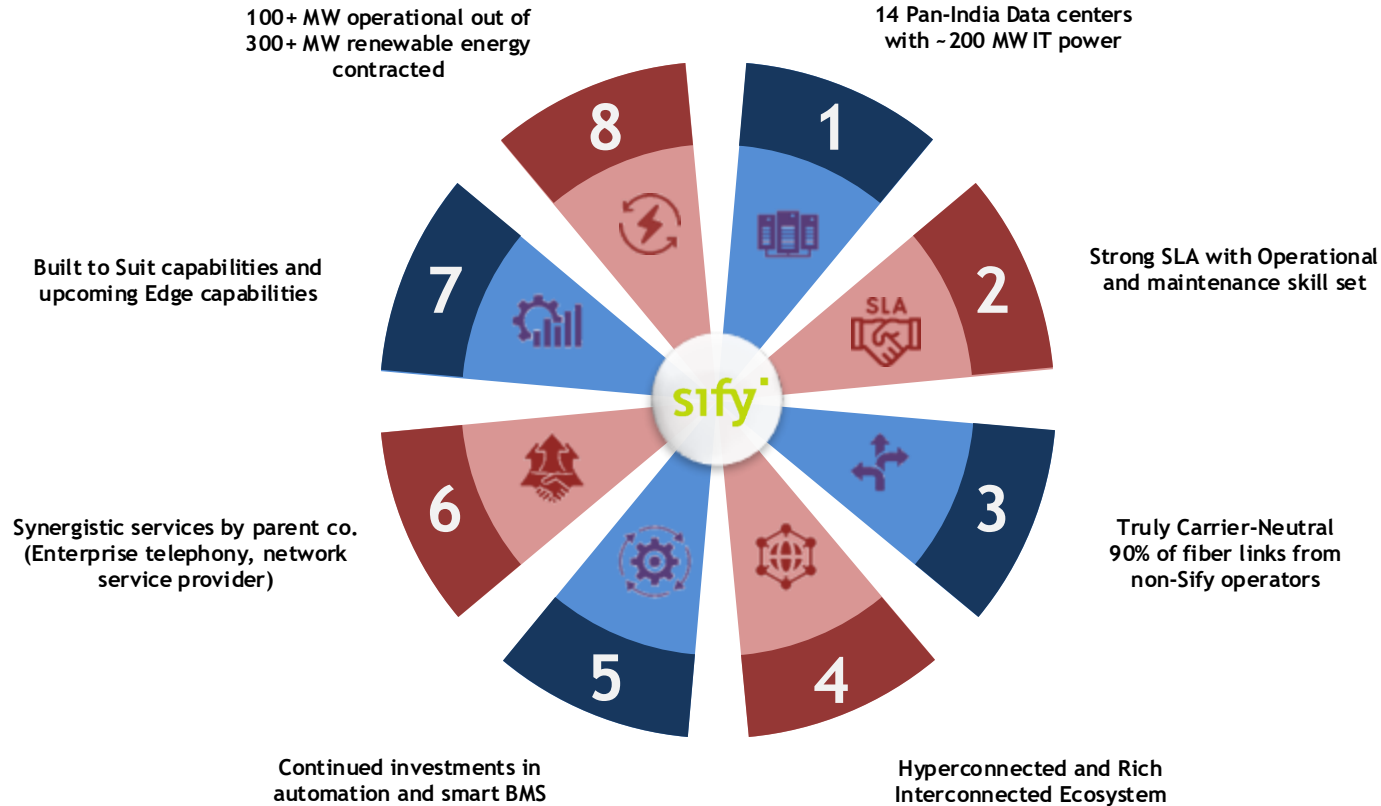
- Next Gen Data center design
- ML/AI platform enabling faster decision-making
- AI for Operational efficiency monitoring and automated reporting
- ~37.4% Operational green Power
- AI workloads up to 130 KW/rack

Trusted Partner

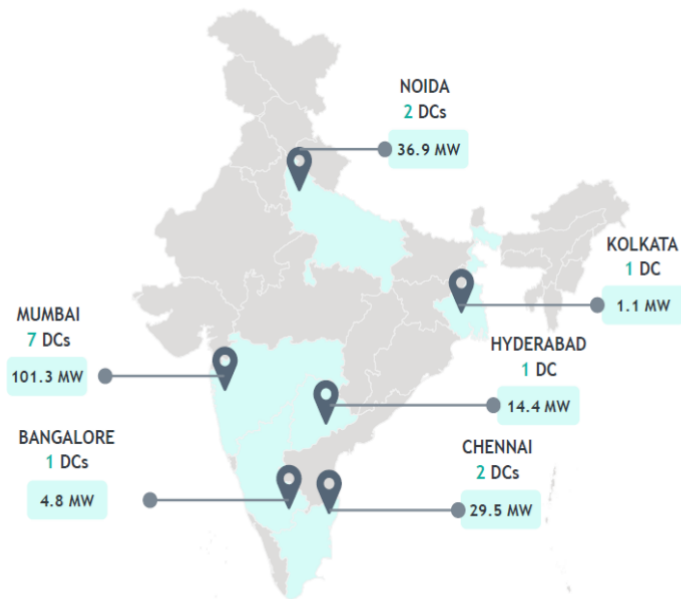


- Reliability of services
- Flexible for customer requirements
- Scalable for future business growth
- Continuous scaling of engagement with no churn

KEY HIGHLIGHTS | SIFY INFINIT SPACES



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



188 MW
14 current DCs¹

- ✓ 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



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



CloudInfini+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

- Infini Full Stack Observability
- Infini 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



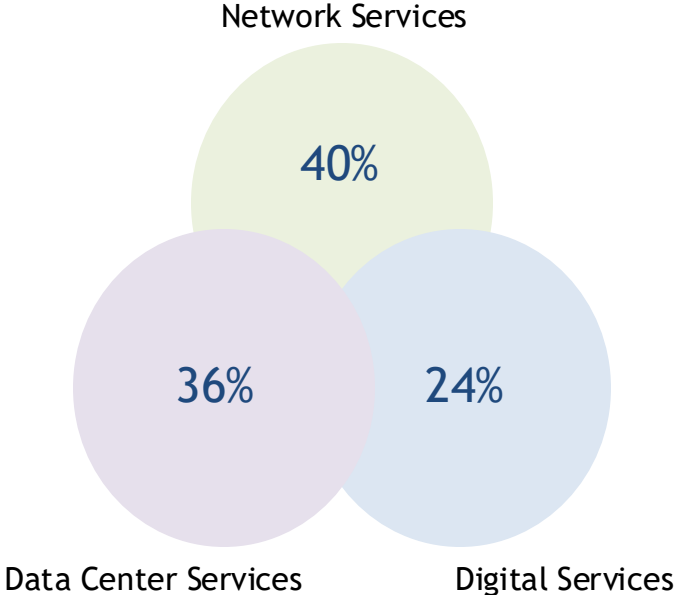
Security Managed Services

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

- Launch GPU Cloud, CloudInfini+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	FY 2024-2025 (USD Million)
Network Services	185.45
Data Center Services	166.81
Digital Services	116.43
Total	468.69

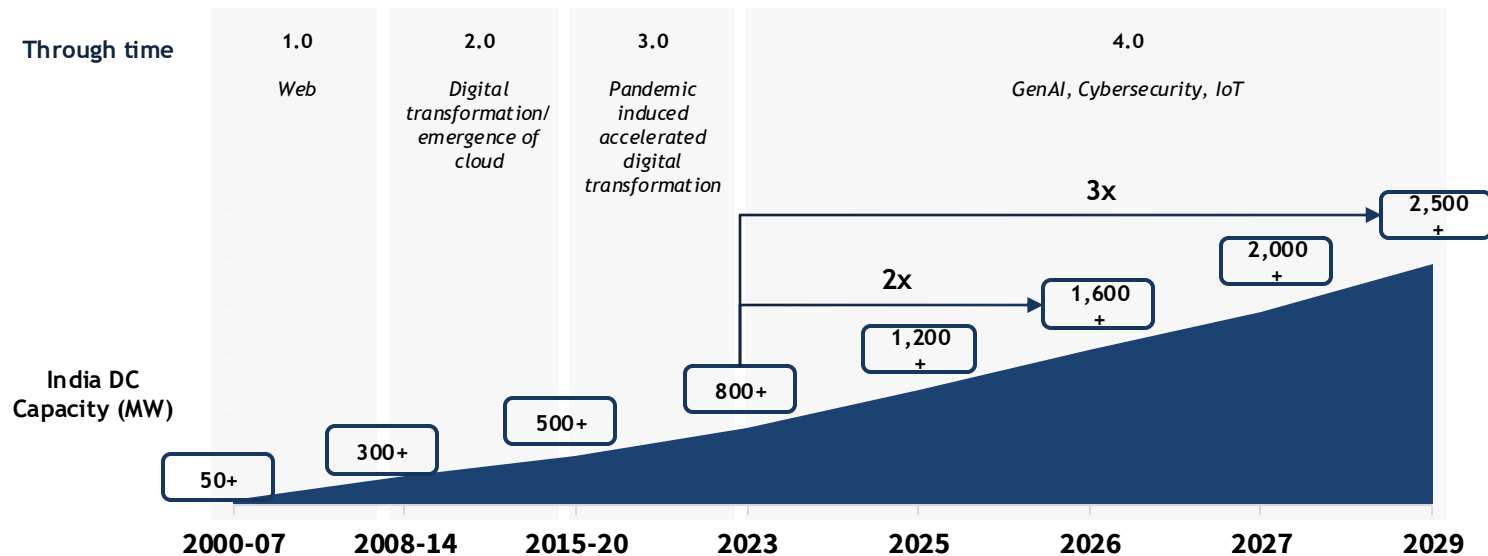


MARKET OUTLOOK

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%

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.



By technology



2G rollout



Rise of Internet



3G rollout



Rapid Smartphone adoption



4G rollout



Sharp reduction in data prices



Artificial Intelligence



Accelerated adoption of cloud



Increasing digitalization



Roll-out of 5G & increased bandwidth



Cybersecurity



IoT

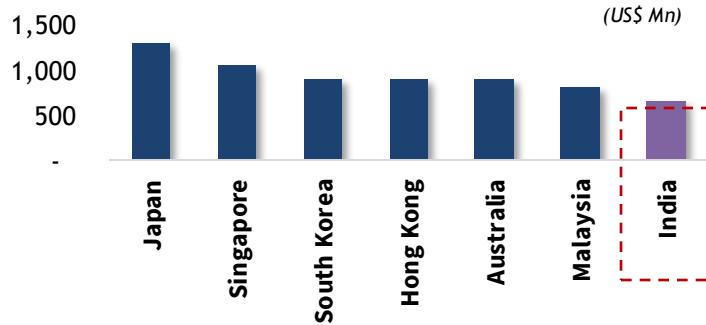
DATA CENTER MARKET OUTLOOK



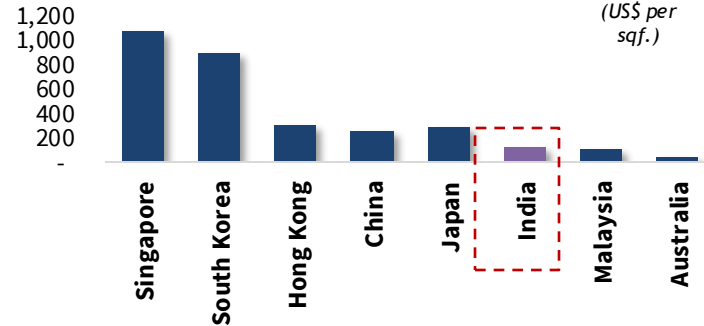
Growth Driver	Description
Rising Demand for Hyperscale Infrastructure	Cloud providers, OTT platforms, and AI firms need large-scale, energy-efficient data centers with massive compute and storage capacity.
Power and Sustainability Mandates	Increasing focus on green data centers, RE sourcing, and energy-efficient 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.

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

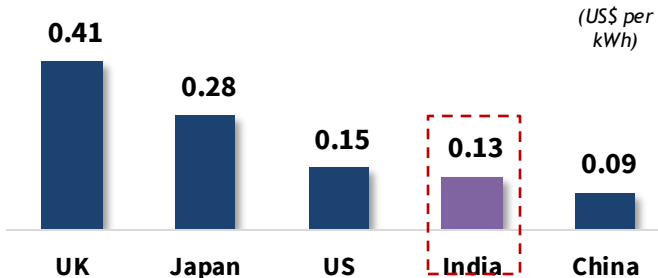
Lowest construction cost for a 100 MW data center



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



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



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

Source: CLSA Research

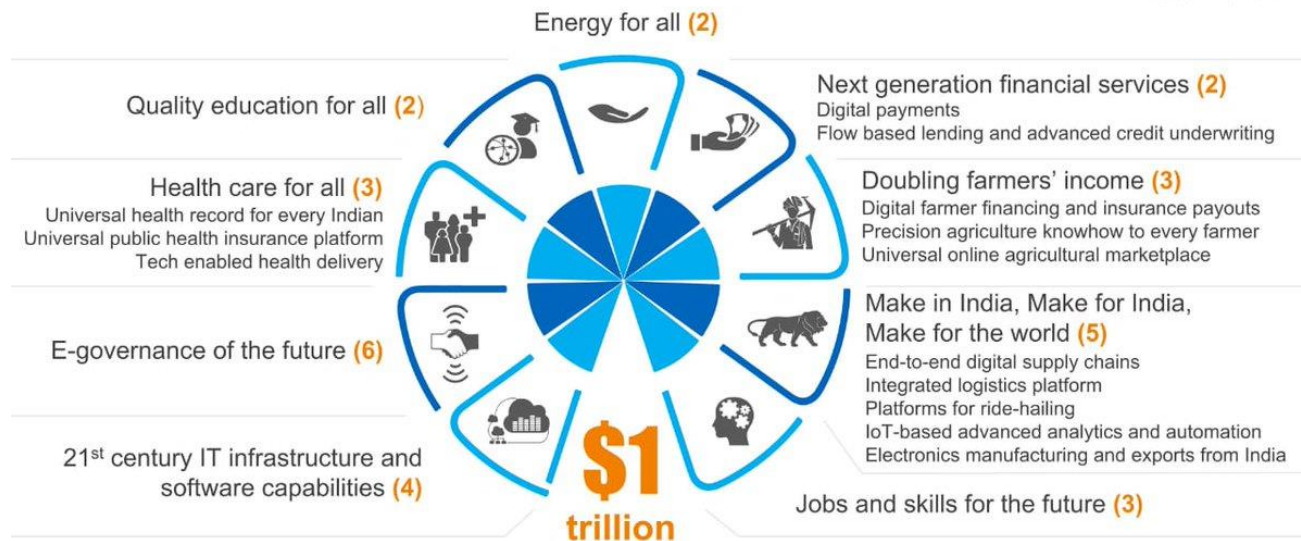
INDIA DIGITAL, CLOUD, AND APP-BASED SERVICES MARKET OUTLOOK

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>

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



India is among the top countries globally on key aspects of digital adoption

India ahead of all countries India **second** in the world India one of the leading countries



1.2

billion

people with
unique digital
identity



560

million

internet
subscriptions



354

million

smartphone
devices



0.1

percent

cost per
Gb of data in
terms of average
per capita
monthly income



8.3

Gb/month

data
consumption
per data
subscriber



17

hours/week

time spent on
social media

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.

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



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



Best Enterprise
Data Center by
The Economic
Times

Industry Recognitions



Data Center, Cloud &
Managed Services



IT Service
Management



DGX Ready Certified

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