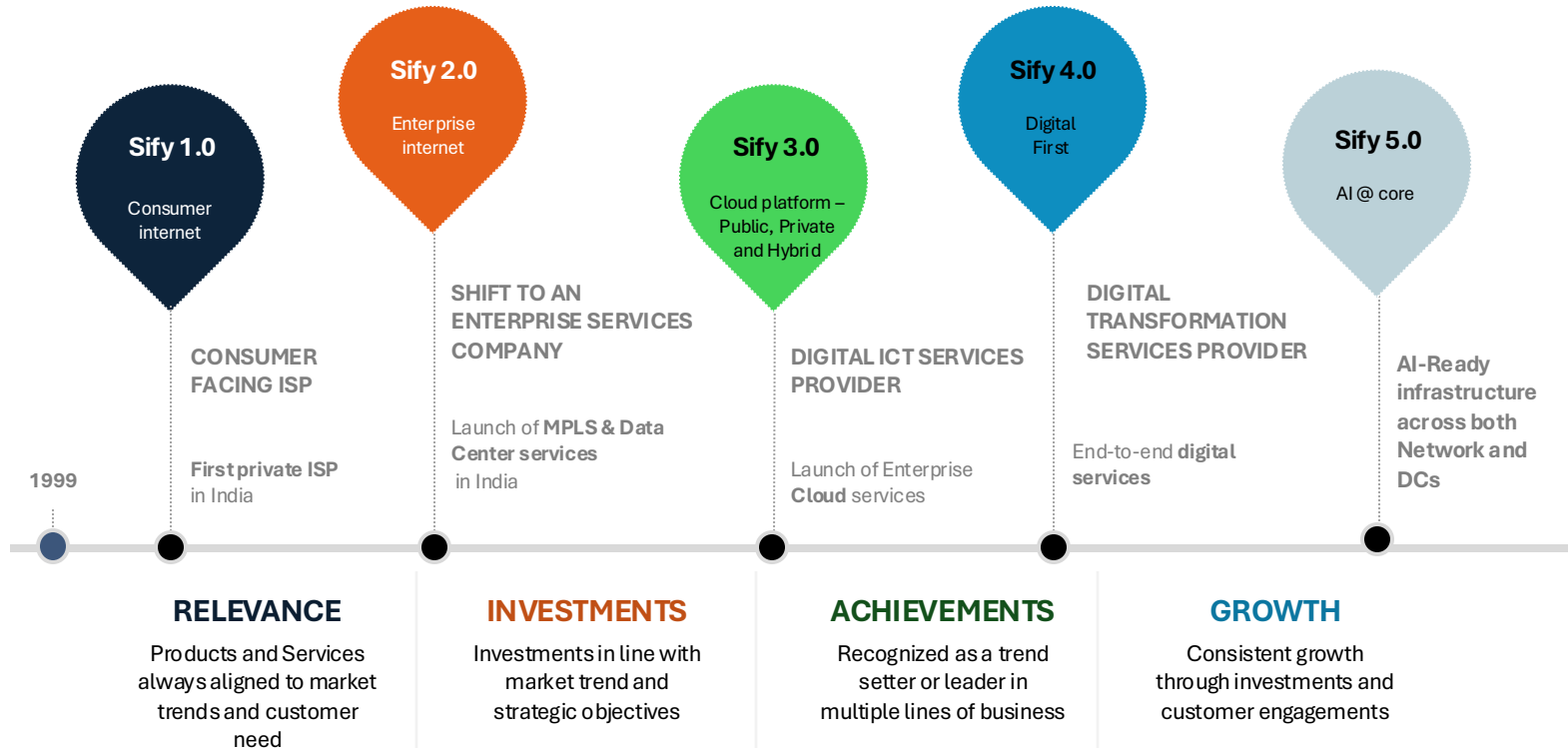


Investor Presentation

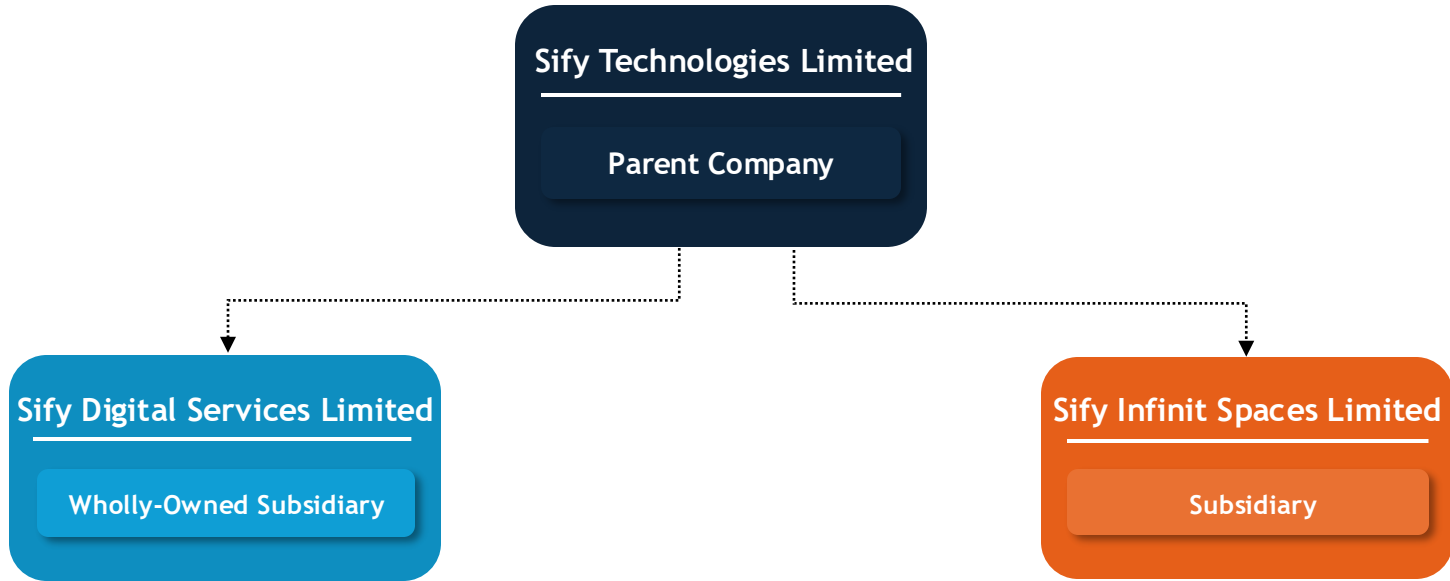
FY 2025-26

May 2026

DIGITAL TRANSFORMATION THROUGH THE YEARS



GROUP COMPANIES



Network
Connectivity
Services



Security
Managed Services



Network Digital
Managed Services



CloudInfnit
Ent Cloud Infra



Cloud & IT
Managed Services



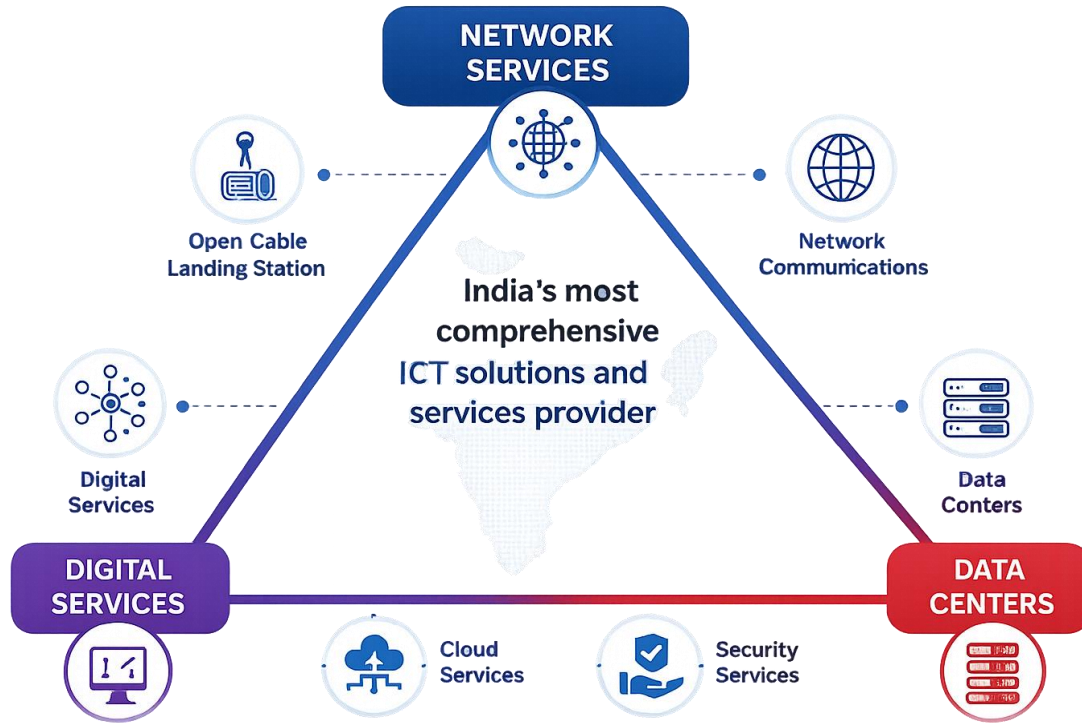
Digital Apps
Managed Services



Industry Apps
Managed Services

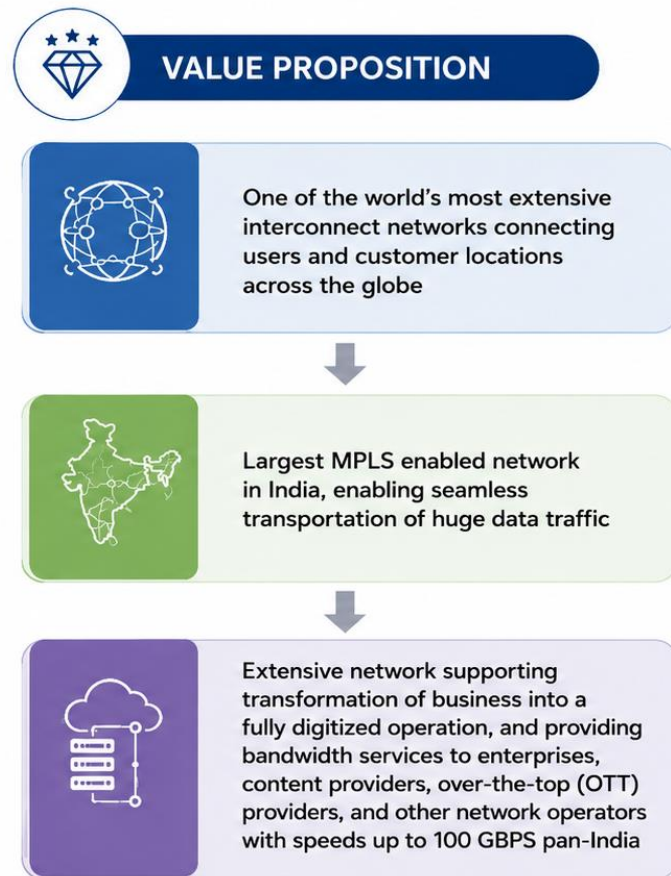
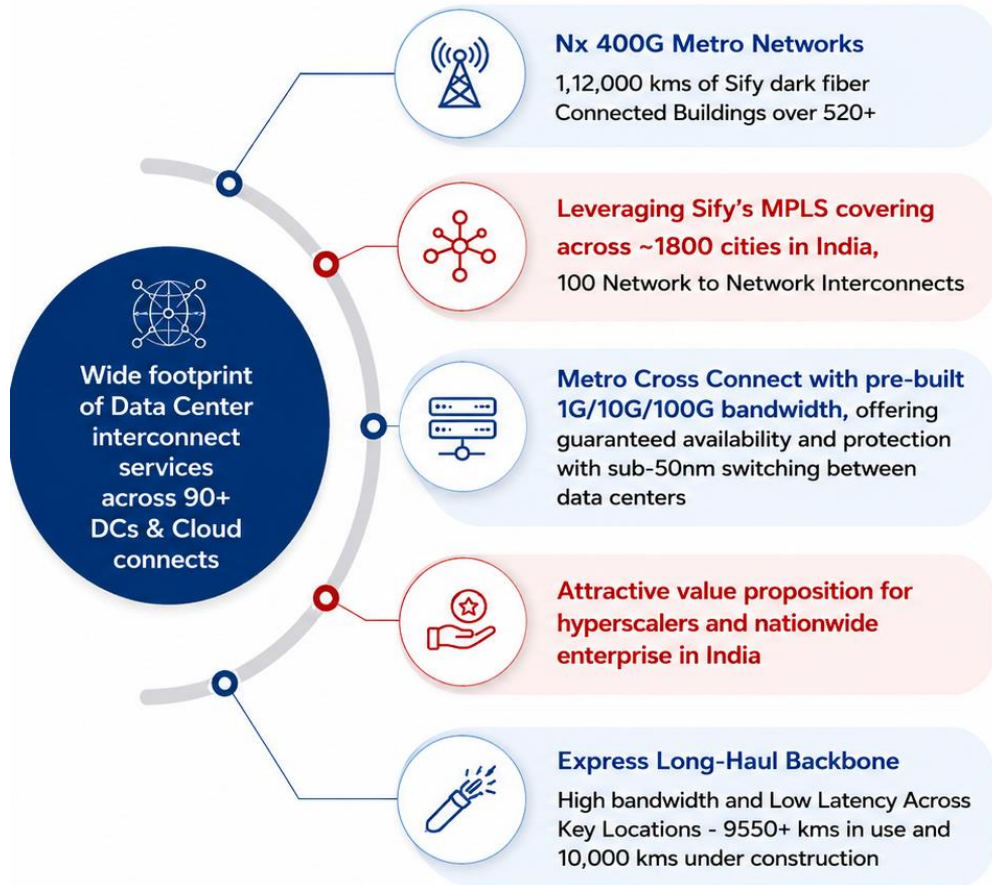


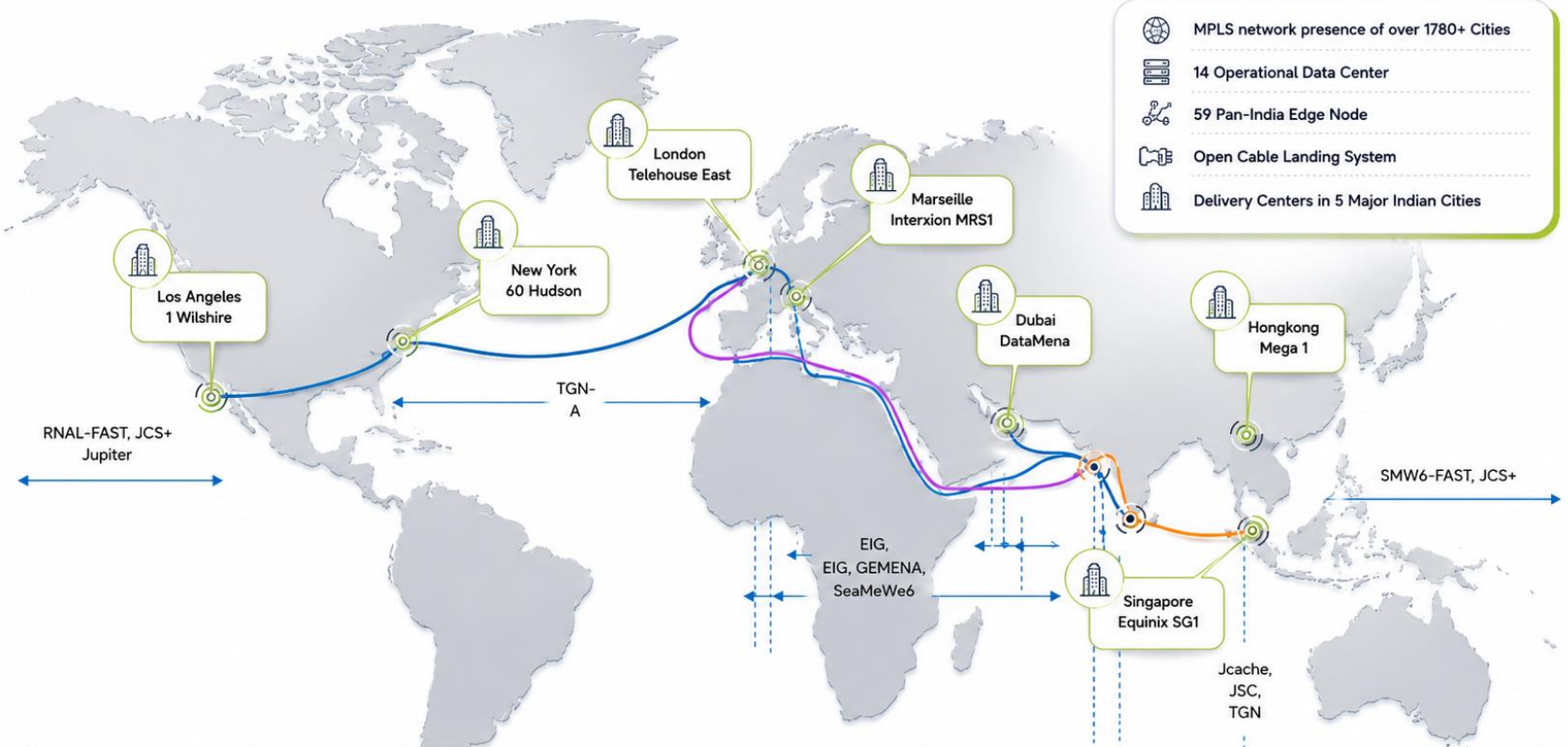
Data Center
Colo Services



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

Network services | Sify Technologies





- MPLS network presence of over 1780+ Cities
- 14 Operational Data Center
- 59 Pan-India Edge Node
- Open Cable Landing System
- Delivery Centers in 5 Major Indian Cities



Global Reach
Seamless connectivity across continents



Reliable Infrastructure
Diverse paths with redundancy



High Performance
Low latency, high bandwidth connectivity

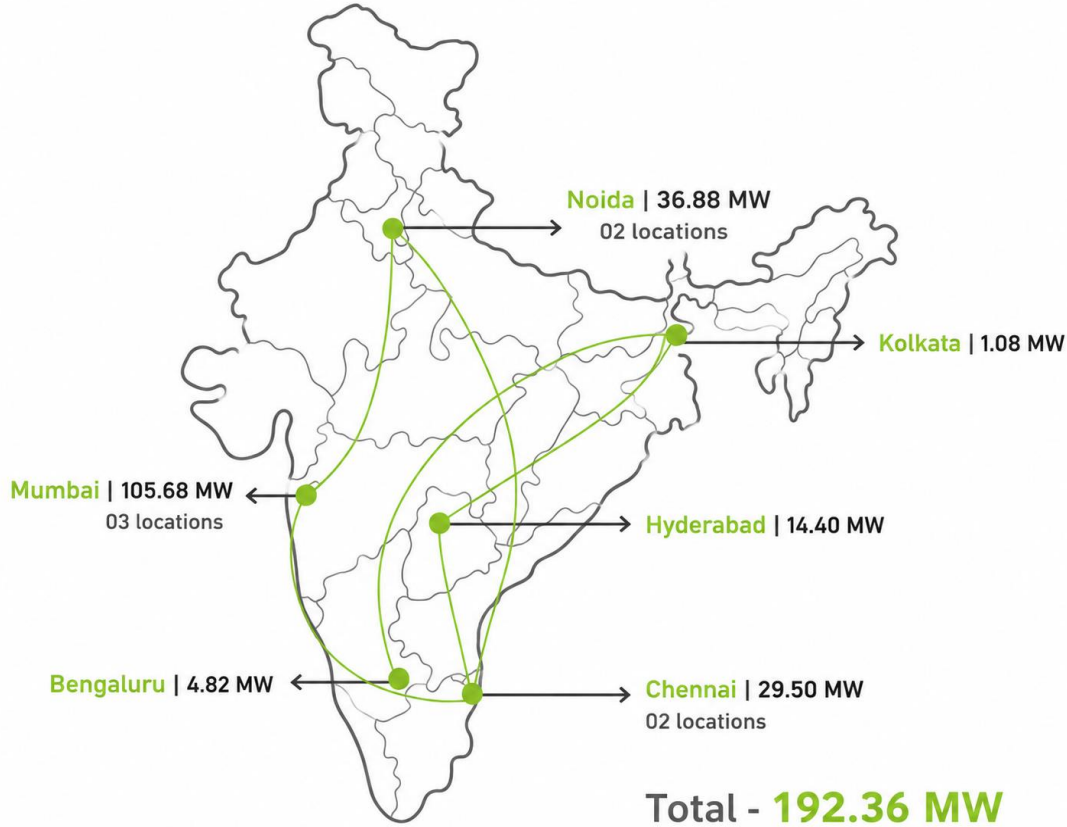


Strategic Partnerships
Strong alliances with global submarine cable systems



Edge to Core
Pan-India edge nodes and global data centers

Data Center Colocation Services | **Sify Infnit Spaces**



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



Mission Critical Customers



All 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



99.982 – 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



~40% Operational green Power



AI workloads up to 130 KW/rack



Trusted Partner



Reliability of services



Flexible for customer requirements

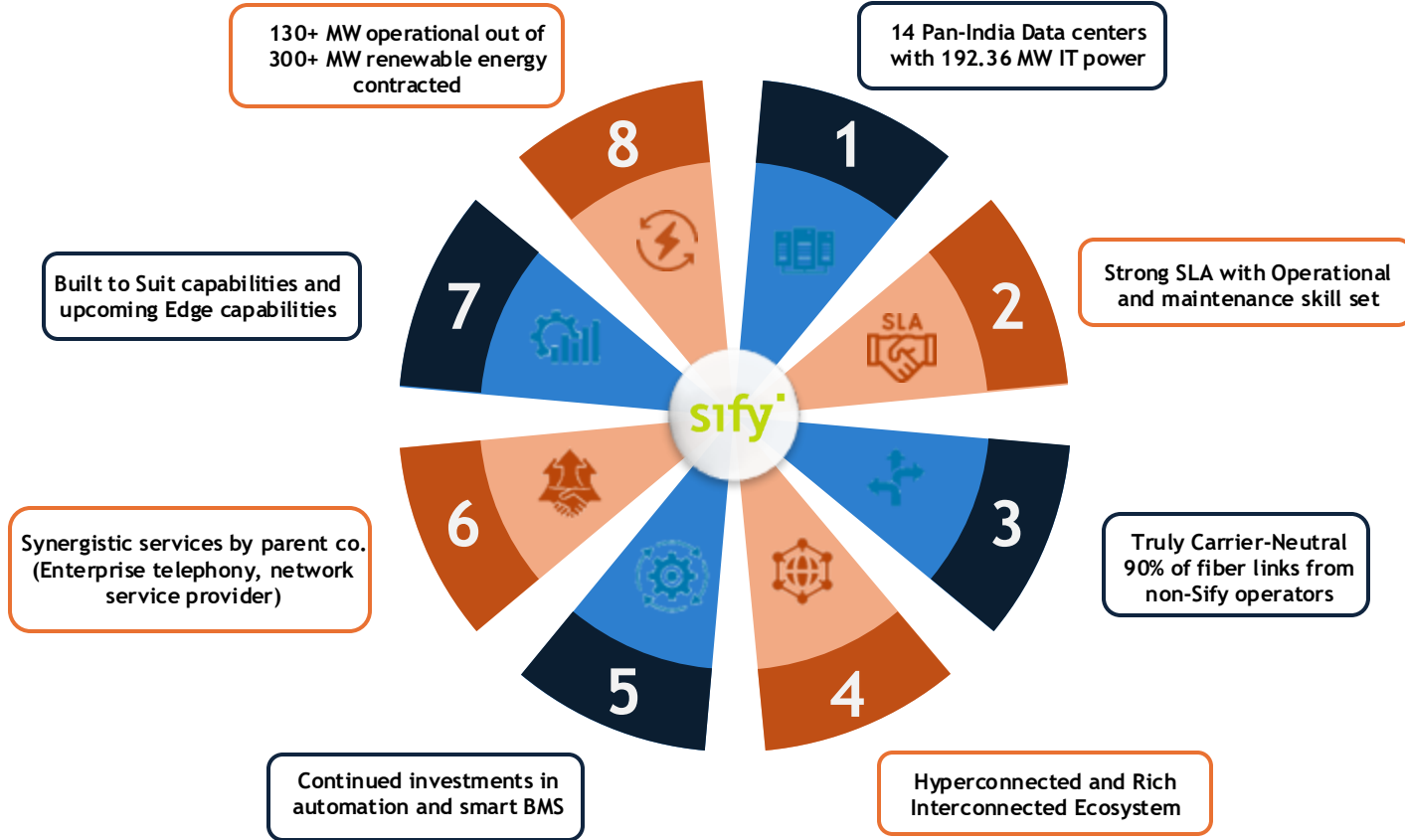


Scalable for future business growth



Continuous scaling of engagement with no churn

KEY HIGHLIGHTS | SIFY INFINIT SPACES



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



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



- Infit Full Stack Observability
- Infit 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



GPU Cloud Launch

CloudInfini+AI now offers GPU-as-a-Service – powerful on-demand GPU access on a pay-as-you-go model for AI and ML workloads.

Sovereign AI with HCL

Strategic partnership with HCL to deliver a fully managed "Sovereign-by-Design" AI stack in India, bridging AI demand and data compliance.




Extensive WAN Coverage

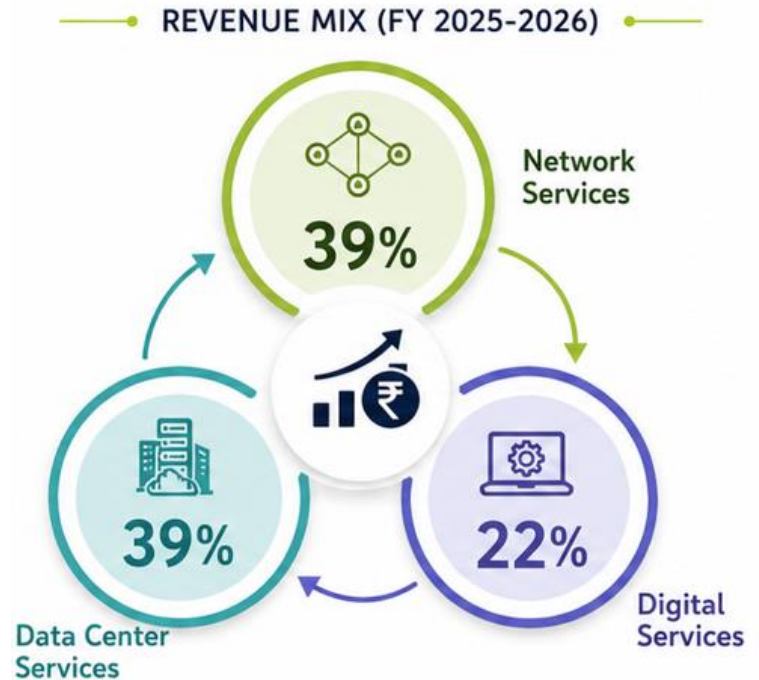
Presence in 1,780 cities with SDN-powered enterprise networks and submarine cable capacity to Europe, the Middle East, and Southeast Asia.

Enterprise Cloud Migrations

Major enterprises – including a leading private network operator, media publisher, and MNC – migrating from on-premise to multi-cloud.

GROUP REVENUE

 Revenue	FY 2025-2026 (USD Million)
 Network Services	189.27
 Data Center Services	188.32
 Digital Services	102.46
 Total	480.05



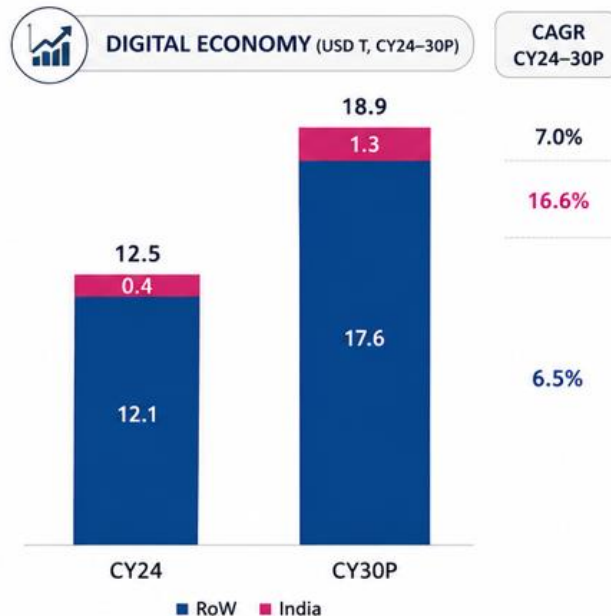
MARKET OUTLOOK

INDIA VS GLOBAL

GLOBAL DIGITAL STATISTICS (CY24)					
	Units	Global	USA	China	India
Size of digital economy	USD T	12.5	2.9	2.4	0.4
Internet users	M	5,240	311	1,105	954
Internet penetration	%	65	93	78	58
Time spent online per user per day	Hours	6.4	7.3	4	6
5G penetration	%	20	75	71	17
DC capacity	GW	-	23.0	4.5	1.3
DC density	MW per M pop*	-	~68	~3	~1

Note(*): Pop* refers to Population

Source(s): Estimation and measurement of India's digital economy report (Jan'25), Lattice analysis












The average price of 1 GB of mobile data is **USD 0.16** in India, while the world average is **USD 2.59**.

However, with internet penetration at just **58%**, compared to over **90%** in developed countries like the USA and the UK, there is still **substantial room for growth**.














MARKET OUTLOOK | NETWORK | INDIA

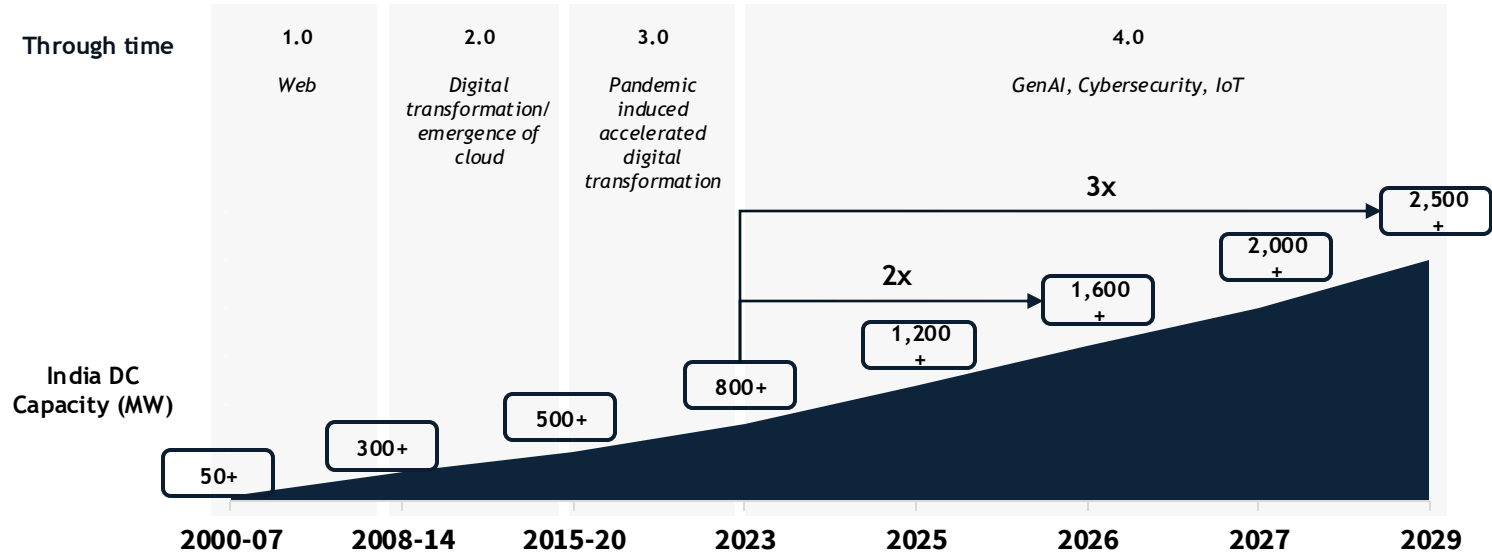












 Service Type	 2024 Market Size	 2030 Forecast	 CAGR
 Enterprise Network Infrastructure	US \$3.02 billion	US \$4.95 billion	7.3%
 Enterprise Networking (inclusive)	US \$16.04 billion	US \$22.22 billion	5.4%
 Software-Defined Networking (SDN)	US \$3.6 billion	US \$8.9 billion	16.1%
 Network Engineering 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%

MARKET DRIVERS | NETWORK | INDIA

 Growth Driver	 Details & Impact
 5G Rollout and Private 5G Networks	<p>The rapid deployment of 5G and industry-specific private networks is driving demand for high-speed, low-latency connectivity solutions.</p>
 Cloud Migration & Edge Computing	<p>Enterprises are modernizing their IT infrastructure with cloud-native environments, needing robust and scalable network backbones.</p>
 Digital Transformation in Enterprises	<p>Manufacturing, BFSI, healthcare, and retail sectors are digitizing operations, requiring secure and agile network services.</p>
 Cybersecurity & SD-WAN Adoption	<p>Increasing cyber risks are pushing demand for secure networking (e.g., SASE, SD-WAN), fueling premium network services.</p>
 IndiaAI Mission	<p>Promotes AI adoption that depends heavily on high-performance data centers capable of intensive computing and large-scale data processing.</p>
 Smart Cities and Public Infrastructure Projects	<p>Government-led smart city and infrastructure projects are expanding the scope for fiber, wireless, and last-mile network deployments.</p>
 Partnerships with Hyperscalers	<p>Collaborations between telcos and cloud giants (AWS, Azure, Google Cloud) are redefining enterprise network models and driving demand.</p>
 SME & MSME Digitization Push	<p>Government incentives and increased awareness are encouraging smaller businesses to adopt managed network and internet services.</p>
 BharatNet	<p>Expands internet access to rural areas, leading to higher data traffic and the requirement for distributed, low-latency data centers.</p>

MARKET OUTLOOK | DATA CENTER | INDIA

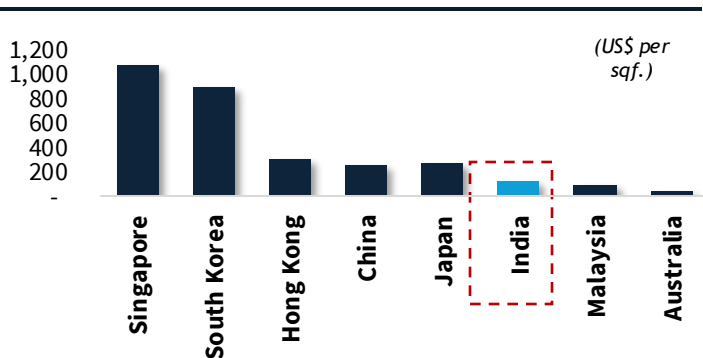


 Growth Driver	 Description
 Rising Demand for Hyperscale Infrastructure	Cloud providers, OTT platforms, and AI firms need large-scale, energy efficient data centers with massive compute and storage capacity.
 Power and Sustainability Mandates	Increasing focus on green data centers, RE sourcing, and energy-efficient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

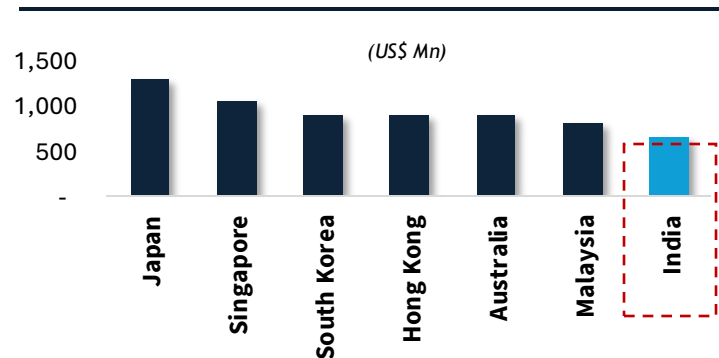


India is on track to contribute **25%** of the development pipeline in APAC...

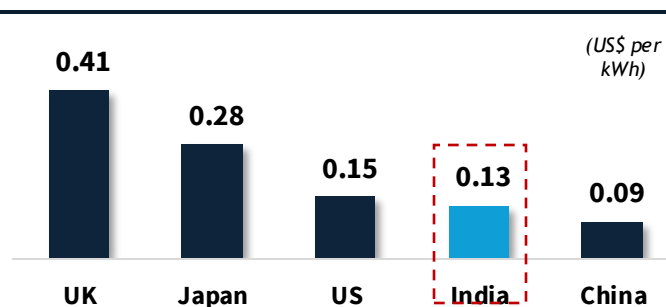
One of the lowest land costs in the region and...



Lowest construction cost for a 100 MW data center



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

MARKET OUTLOOK | DIGITAL & IT SERVICES | INDIA













 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>











GROWTH DRIVERS | DIGITAL & IT SERVICES | INDIA



 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.

CENTRAL LEVEL POLICIES & SCHEMES | INDIA

Government policies and initiatives help shape up on-ground industry realities.

 Policy / Initiative	 Key Impact on Industry
 DPDP Act 2023 & Rules 2025	Enable government notifications to restrict cross-border transfers or mandate local storage for specific data categories and significant data fiduciaries, incentivizing investment in compliant data centers.
 Cybersecurity Budget 2025	INR 1,900+ crore allocation requires advanced security in data centers.
 Draft Data Center Policy	Incentives, easier approvals, and goal to make India a global data center hub.
 Telecom Regulatory Authority of India (TRAI) Recommendations, 2022	Clear guidelines for digital infrastructure like data centers, simplified licensing, infrastructure sharing, and faster approvals to lower entry barriers.
 BharatNet Project	High-speed broadband for gram panchayats; supports rural data center growth.
 National Digital Communications Policy (NDCP)	Universal broadband and rural digital infrastructure to support nationwide connectivity and focus on building strong digital infrastructure such as data centers, CDNs, and interconnect exchanges.
 Smart Cities Mission	Real-time urban management relies on local data centers.
 Digital India Initiative	Digitally empower citizens and deliver government services online.

AWARDS AND CERTIFICATIONS | GROUP



Corporate Governance



Golden peacock award
by Institute of Directors
2014 and 2024



Madras Management Association
Award for Managerial Excellence
2024

Investor Relations



Integrated Report
Gold Award



Video Coffee Table book
Gold Award



Integrated Report
Gold Award



Video Coffee Table book
Silver Award

Sustainability



ICRA

Rated "Outstanding" by
ICRA with score of
80/100 for FY 25-26

Partner Recognitions



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



CISCO Gold Provider
Designation Achieved



APAC
RISING
STAR 2025



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

Industry Recognitions



ICONIC BRAND
OF INDIA 2025
by Economic
Times



IGBC Platinum
green certified
Data Centers



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



01

RESILIENT REVENUE GROWTH

Sify sustained steady momentum, with quarterly revenues reaching **INR 44,877 Million (USD 480 mn)**, reflecting an **13%** growth over last year, driven by strong traction across data center and network services.



02

DATA CENTER CAPACITY ADDITION

Sify has undertaken new data center and edge data center projects during the year, reinforcing its position in addressing rising enterprise and hyperscaler demand.



03

SUSTAINED CAPITAL INVESTMENTS

Sify continued to invest in future-ready infrastructure, with CAPEX reaching **INR 13,282 Million**, aligned with its long-term digital infrastructure strategy.



04

ESG RATINGS

SISL achieved an **“Outstanding”** ESG Rating from ICRA with an overall score of **80**, reflecting Sify’s strong commitment to sustainable and responsible business practices.



05

REASONABLE ASSURANCE

Secured Reasonable Assurance for voluntary Business Responsibility and Sustainability Reporting (BRSR) disclosures across all core indicators, reinforcing SISL’s commitment to transparency, accuracy, and responsible reporting.

Tried. Tested. Trusted.

Your digital infrastructure partner for over 25 years

Thank You

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