



Sales & Marketing:

A Robust Blueprint

for Continued Growth

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President Sales & Executive Board Member
9th December 2021



LTI's Sales Programs Over the Last 5 Years have Delivered

Industry Leading Growth

Minecraft

ADEA

Hunting Pack

Aspire

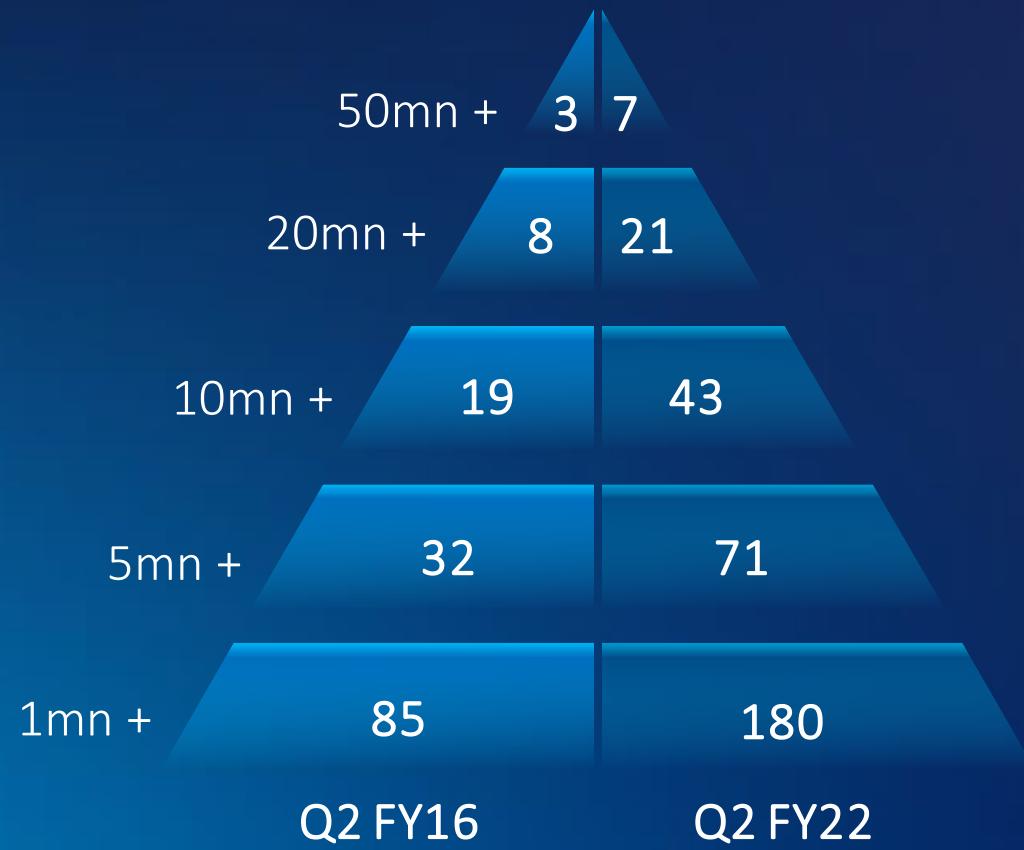
Grit Alliance

Innovative Sales
Incentive Plans

LTI Go^{Mx}

LTI's Sales Programs

Minecraft, Hunting Pack, ASPIRE

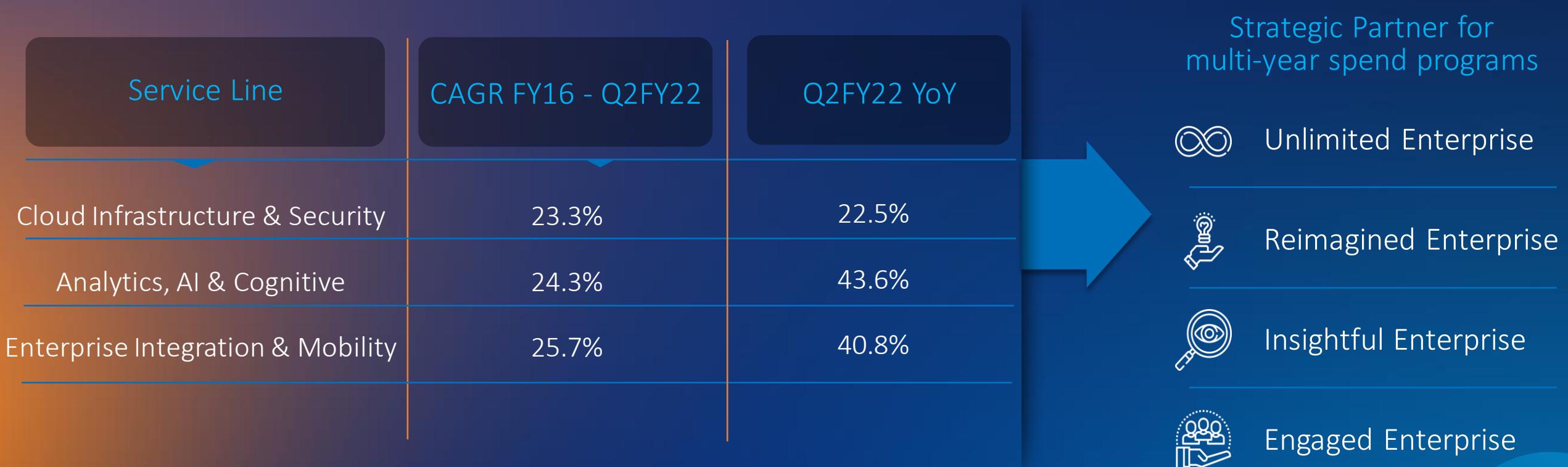


New Logo Revenue FY16 - Q2FY22	
Fortune 500	22
LTM Revenue Contribution	
500+ Mn	
Large Deals FY16 - Q2FY22	
No. of large deals	30
Total TCV	1.5+ Bn
TCV from new logos	56%

Our Market Leading Ability to Scale

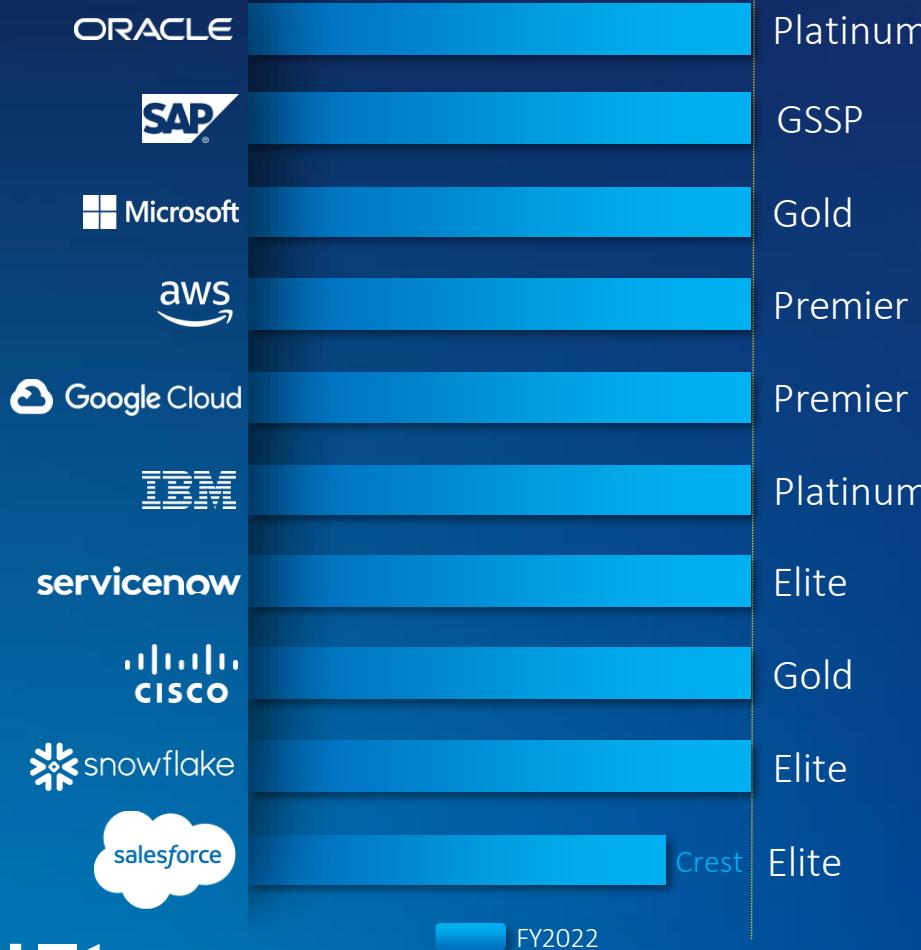
New Capabilities

Makes us a Preferred Partner for Transformation Projects



Our Partner Ecosystem Innovation Partner

Sees Us as a Key
and are Making Significant Investments in us



Global Innovation
Partner of the Year



Energy Competency
Launch Partner



Experience Center for
Digital Transformation



Innovation Partner of
the Year



Partner of the Year –
App Innovation

Partner Investments in LTI



Restack



MoU



3 year Strategic
Collaboration



Strategic
Collaboration

Sustained **Industry Leading Growth**

Creates a Pull Factor

Indian IT	CAGR FY16 - Q2FY22	Brand value	Growth in 2021*
Top 5 Players	7.4%	Top 5 Indian	10.6% 
Top 10 Players	7.7%	Top 10 Global	(5.1%) 
LTI	14.3%	LTI	37.1% 



Large Deal
Invites from
Advisors (CY 2021)

23

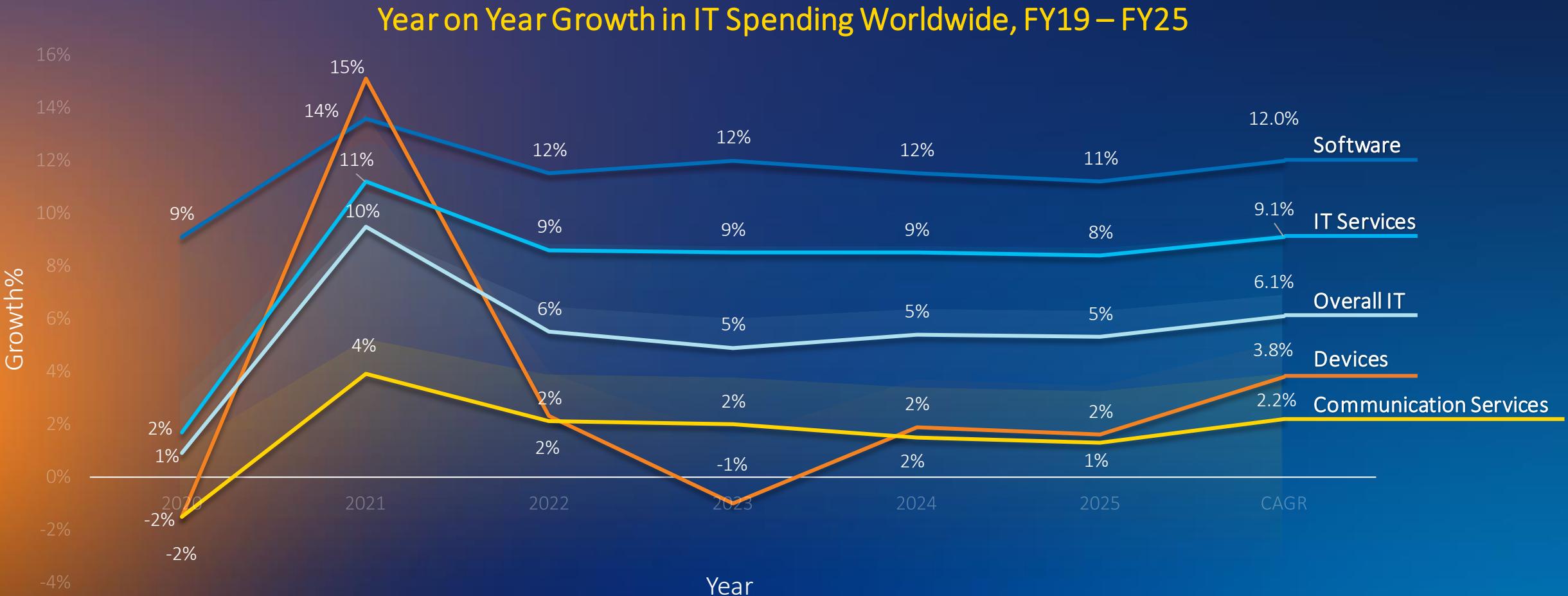
Must-Have New
Logos engaged on
digital channels

150+

*Source: Brand Finance IT Services 25 2021 Report (Jan 2021)

Looking ahead...

IT Services – Secular Projection of High Spend over the next 5 Years



Source: "Gartner (October 2021)" (G00759428)

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IT Spend Projection

in LTI's existing Sweet Spots



Source: "Gartner (October 2021)" (G00759428)

LTI has a clear Sales Strategy going forward

CHIP Framework



Consolidate and Grow Existing Areas of Strength



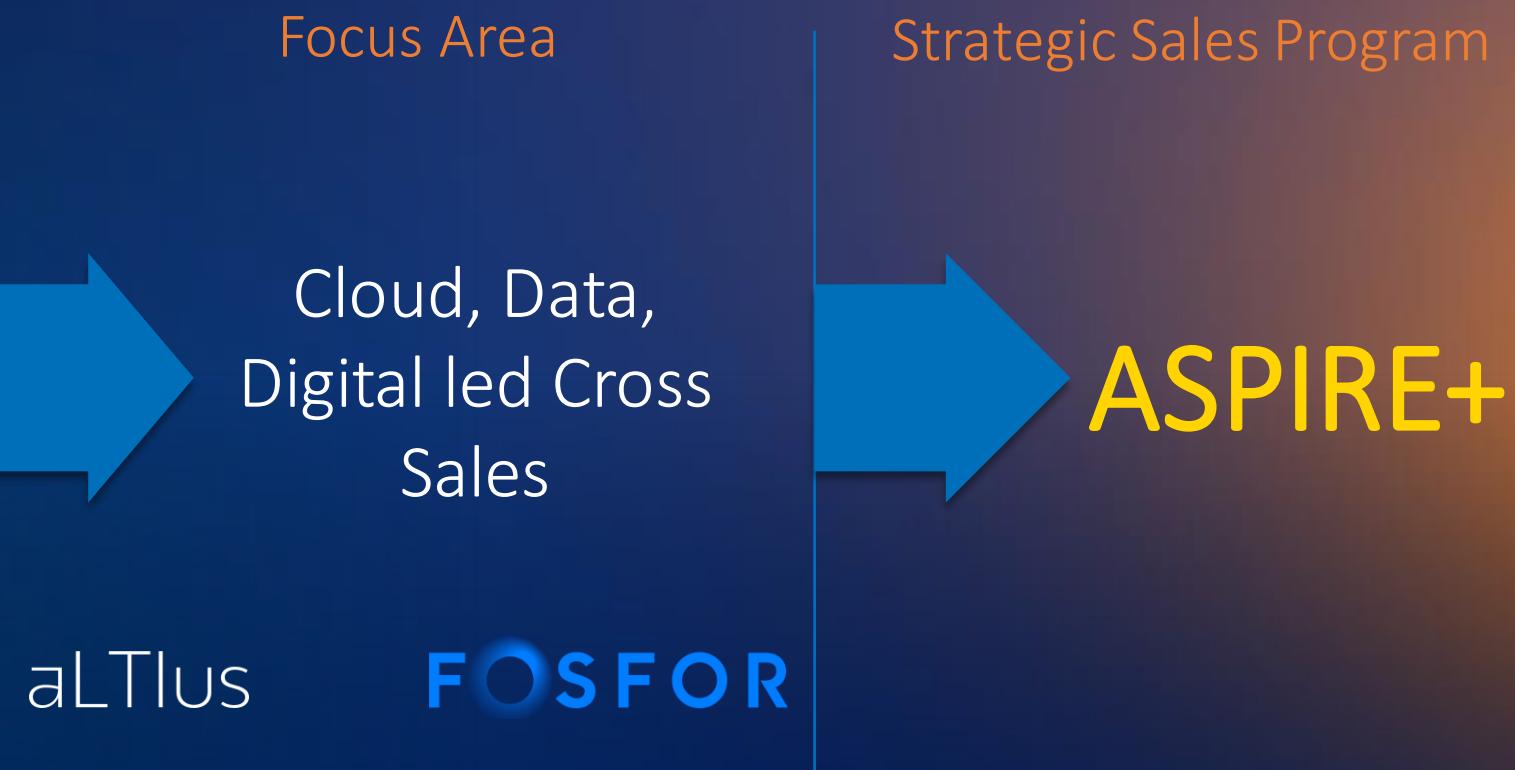
Harvest Existing High Growth Engines

Fortune 500 Accounts
53 high potential growth accounts

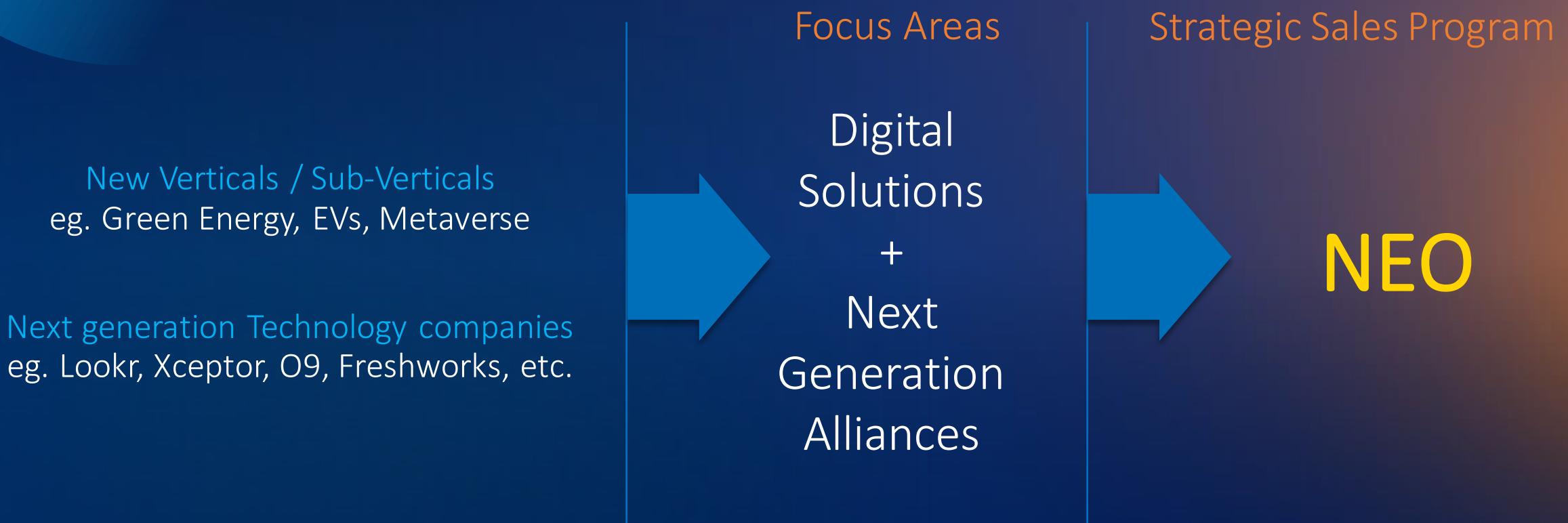
New Logos
126 opened in last 6 quarters

High Potential Sub-Verticals
Eg. BioTech, Streaming, Payments, InsureTech

New Growth Regions
UK, Australia, Switzerland, Middle East



Incubate New Growth Engines



Incubate New Growth Engines

Digital Solutions – Renewables

High	> 1 Bn	Medium	~500Mn	Low	< 300 Mn
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Sr #	Solution	Description	Existing / New	Partner / Own	Market (Potential –HML)
1	Drones based remote monitoring of Solar/Wind Equipment	Inspection with Drones equipped with customized sensors, digital cameras, Infrared/Thermal imaging sensors to collect high-quality data for predictive maintenance and performance improvement. As per Bain this is an important area to build IT services.	New	EASIFLOW, MEASURE	High
2	Grid Optimisation for Distributed Solar/Wind Farms (Blockchain based solutions)	With distributed generation and huge variation in supply, grid optimisation will be very essential part of Solar/Wind power. Microgrids will need common accounting book (Blockchain based) to manage transactions. As per GIG Analytics this is a high Potential area	New	Utilities, Energy/Nautics, EasyPower	High
3	Operations Management & Asset performance for Wind & Solar	Integrated collaboration Center for managing Solar & Wind Farm operations, maintenance and performance. Cloud, IoT, Data & AI based remote monitoring, analysis and predictive / Prescriptive maintenance of Wind and Solar farm assets. As per Bain this is major area for IT service vendors	New	Partners	High
4	Micro Grid Management (Virtual Power Plant)	Cloud-based distributed power load dispatch centers that aggregates the capacities of heterogeneous distributed energy resources (DER) for the purposes of enhancing power generation, as well as trading or selling power on the electricity market. Bain and GIG Analytics think is could have Unlimited opportunities	New	AutoGrid, NEOMICS	Medium
5	Remote EV Station Performance	Remote management of EV infrastructure performance & Maintenance, vehicle Charging transactions, Billing & Customer Management. European & Nordic energy majors investing heavily.	New	Own + Partner	Low
6	Field Mobility Solutions	Mobile based Inspections, Repairs & Maintenance, AR/VR based Asset location & training Applications for Solar & Wind farm field force. As per Gartner this a major area for IT service providers	Existing	Own	High
7	Power Trading Solutions	Implementation, Upgrade, Enhancement, Integration & Support of widely used Power Trading Solutions for Energy Clients. LTI will extend its energy trading capability to Power trading	Existing	Own + Partner	Low
8	Predictive maintenance systems for Fuel Cells (Green H2)	Realtime condition monitoring, Predictive maintenance solutions for early warnings and proactive actions.	Existing	Own	Low

Incubate New Growth Engines

Digital Solutions – ESS / Battery

		High	> 500 Mn	Medium	200-300Mn	Low	< 100 Mn
Sr #	Solution	Description			Existing / New	Partner / Own	Market (Potential –HML)
1	Battery lifecycle management (Connected battery, Battery management system)	Solutions to monitor and track battery lifecycle including battery testing for performance, quality, safety, corrosion, degradation.			New	Nicola	High
2	Battery Analytics	Predictive health check and battery degradation analysis. Machine learning technology and AI algorithms for early warnings and predictive maintenance. Tracking data from thousands of sensors to identify the health of the systems at every single and figuring out how the batteries can best be used.			New	ION Energy Energistics CE	High
3	Energy storage management system	Forecasting demand and managing batteries and renewable energy plants. Efficient battery management for renewable energy sources and grids using proprietary algorithms.			New	Autovolt, Peak power	Medium
4	Energy storage analytics / simulation	There is a need for continuous analysis of power capacities to eliminate any disparities between demand and renewable supply. Energy storage analytics leverages big data and machine learning in order to extract energy storage insights in real-time.			New	France	Low
5	Energy storage as a service	Battery storage manufacturing is growing fast. Battery manufacturers are collaborating with producers, consumers and regulators to provide EaaS. This segment is looking for Digital solutions for battery manufacturing for cost optimization, supply chain optimization and to manage EaaS.			New		Low
6	Smart manufacturing for battery Supply chain tracking and optimization	Automation, robotics, manufacturing operations systems (MES) and digital services to guide and support Smart Manufacturing solutions.			New	ABB/Honeywell	Medium
7	Battery - Digital Twins for modelling and simulation	Multi-scale battery modelling and testing for designing, sizing and selecting the most appropriate storage system as per requirement of range, reliability, size, weight, and lifetime.			New	Siemens	Medium

Incubate New Growth Engines

Digital Solutions – Decarbonization

		High	> 100 Mn	Medium	50-100 Mn	Low	< 50 Mn
Sr #	Solution	Description			Existing / New	Partner / Own	Market (Potential –HML)
1	Emission Management Solution	LTI will provide holistic emission management system for detection, monitoring, tracking, and reporting of GHG. Services would include product selection, configuration and support. As of today there are many products in the market but none is catering to exact client needs. As per Gartner no good solution exists in the market and there is high demand from Customers.			New	Own/ Tech Partner (Sphere, ERA, Evolution, Velocity EHS)	High
2	Carbon Accounting & Trading Solutions	As per new stringent regulations, companies are mandated to monitor, track and report carbon at every stage of operation. It is huge challenge for companies like integrated O&G companies to measure and track every carbon molecule produced. LTI to leverage its domain strength in accounting, build partnership with leading S/W providers and provide carbon accounting services. As per Gartner, huge spend is expected for carbon accounting S/W and services.			New	Own + Partner	High
3	Digital solutions to improve Operations Efficiency	As per Gartner, companies will have to cut down their energy consumption by optimizing their operations through digital transformation initiatives. LTI would extend its capability, solutions and partnerships.			Existing	Own + Partner (Innovent, AsperTech)	Medium
4	Integrated Energy Efficiency Dashboards	LTI would use its proprietary data products to acquire and analyze energy and emission data and provide comprehensive set of KPIs to monitor, track, predict and suggest preventive actions.			New	Own	Medium
5	Fugitive/GHG leak detection systems / Flaring	Fugitive leakages and flaring are major sources of emissions for all Natural gas producers and consumers. Advanced leak detection systems are becoming regulatory requirement. LTI to extend its expertise and solution in AEDS for Fugitive/GHG leak detection.			Existing	Partner (ESL, Emerson)	Medium
6	Regulatory Compliance Solutions	Monitoring and reporting regulatory compliance towards emissions of GHG is mandatory for all operators. LTI to extend its expertise and solutions to provide services for energy sector.			Existing	Own	Medium
7	CCUS IT/Infra/Cloud Solutions	Huge investments are made globally on CCUS initiatives. LTI's 'New Energy' group also provides EPC services for CCUS. LTI to build on its domain strength and provide solutions to monitor and track CCUS success parameters. These services are required by many industries like steel, cement, Blue H2.			New	Own	Low
8	ERP Based sustainability solutions (SAP /SAPX Sustainability Toolkit)	Most of our clients and energy companies use SAP and SAPX and would be inclined to use sustainability functions provided by these vendors. LTI to build capability and partner with these vendors to provide services.			Existing	Own + Partner	Medium

Incubate New Growth Engines Potential Partnerships – Renewables

Partner	Area	Partnership Details
EAUTOLINK	Solar / Wind Drone based remote monitoring	Ukraine based company has Aerodiagnostic solutions for aerial inspection and aerial object recognition. Computer vision and machine learning technologies provide the foundation to video data analysis to analyze real world data. Partnership Opportunity : Build Built-On solutions, Integration services, Configuration/Implementation service
MEASURE	Solar / Wind Software platform for drones	US based company is leader in Aerial Intelligence solutions using drones. MEASURE has several mobile flight application, mapping and data analytics tools as a part of their platform. In April 2023, Measure was acquired by Agyleer Aerial Systems Inc., an industry leading drone solutions provider. Partnership Opportunity : LTI to use this platform and build remote monitoring and inspection applications for solar and wind farms.
net², McPhy PLUGPOWER	Green H2 - Electrolyzer, Fuel Cell OEM	Net² / McPhy are OEM for electrolyzers while PLUGPOWER is OEM for Fuel cell. Partnership Opportunity : Connected products - AI/ML based analytics for predictive maint, realtime condition monitoring. Partnership among LTHE as EPC vendor, OEMs for electrolyzers and fuel cells and LTI for digital solutions using OT/IT for realtime monitoring and predictive maintenance.
Utility, Energynautics	Energy Management Smart grid solutions	Utility is US based energy technology company provides a grid-edge operating platform that delivers the essential capabilities for running the clean, modern grid. Energynautics is Germany based company provides consultancy services for smart grid, grid optimisation, modelling & simulation for power generation. Partnership Opportunity : LTI to explore partnership opportunities with both, to provide end to end grid solution from consulting to smart grid.
Audentia	Energy Management Virtual power plants, Microgrid	US based company has wide range of solutions for solar + storage, Microgrids, renewable trading, EV, Virtual power plants. LTI to explore partnership for implementation and support. Global customers include Shell, Total, National grid, NEDker, Schneider. Partnership Opportunity : LTI can become implementation and support partner for solution like virtual power plants, Solar+storage, Microgrids.
KION Energy	Battery Analytics Battery management system	Mumbai based KION Energy provides advanced battery management system and intelligence platform to improve the life and performance of lithium-ion batteries that power electric vehicles and energy storage systems. They also provide Digital Twin Platform for Predictive Analytics. Partnership Opportunity : Possible target for acquisition.
Honeywell / Agenetech	Asset performance	Honeywell and Agenetech asset performance solutions are widely used in Energy and renewable industry. Partnership Opportunity : Extend partnership to provide end to end asset performance solutions for distributed power generation units for renewables.
TAURUS	Battery simulation and Analytics	Germany based company has products for battery simulation and predictive analytics for energy storage services. Partnership Opportunity : Provide end to end service using their product.

Finally...

The background of the slide is a high-angle aerial photograph of the city of London, showing the River Thames on the left, the Palace of Westminster and Big Ben in the center, and the dense urban sprawl of the city to the right.

LTI

Large Deal Pipeline

2.07 Bn

44% from New Logos



Let's Solve

