



Sales & Marketing:

# A Robust Blueprint for Continued Growth

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

# Industry Leading Growth

Minecraft

ADEA

Hunting Pack

Aspire

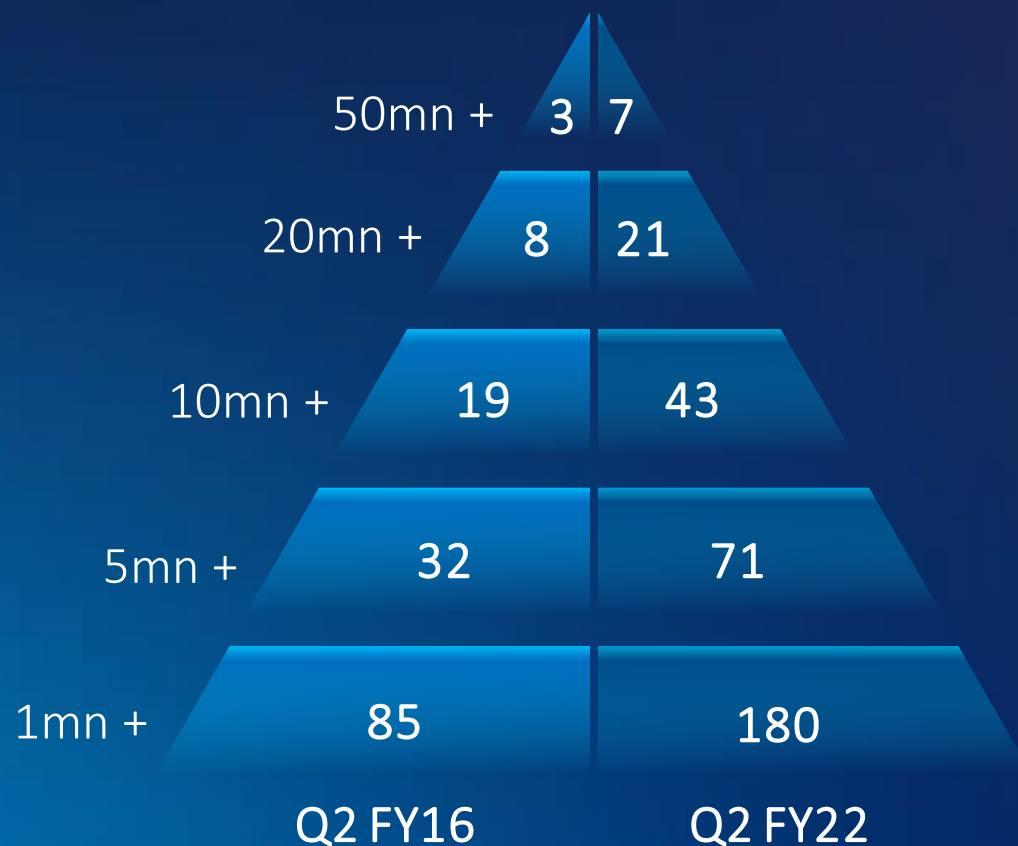
Grit Alliance

Innovative Sales  
Incentive Plans

LTI Go<sup>Mx</sup>

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

| Service Line                      | CAGR FY16 - Q2FY22 | Q2FY22 YoY |
|-----------------------------------|--------------------|------------|
| Cloud Infrastructure & Security   | 23.3%              | 22.5%      |
| Analytics, AI & Cognitive         | 24.3%              | 43.6%      |
| Enterprise Integration & Mobility | 25.7%              | 40.8%      |

Strategic Partner for  
multi-year spend programs



Unlimited Enterprise



Reimagined Enterprise



Insightful Enterprise



Engaged Enterprise

# Our Partner Ecosystem Sees Us as a Key Innovation Partner and are Making Significant Investments in us



# Sustained Industry Leading Growth

Creates a Pull Factor

## Indian IT

## CAGR FY16 - Q2FY22

Top 5 Players

7.4%

Top 10 Players

7.7%

LTI

14.3%

## Brand value

## Growth in 2021\*

Top 5 Indian

↑ 10.6%

Top 10 Global

↓ (5.1%)

LTI

↑ 37.1%

Large Deal  
Invites from  
Advisors (CY 2021)

23

Must-Have New  
Logos engaged on  
digital channels

150+

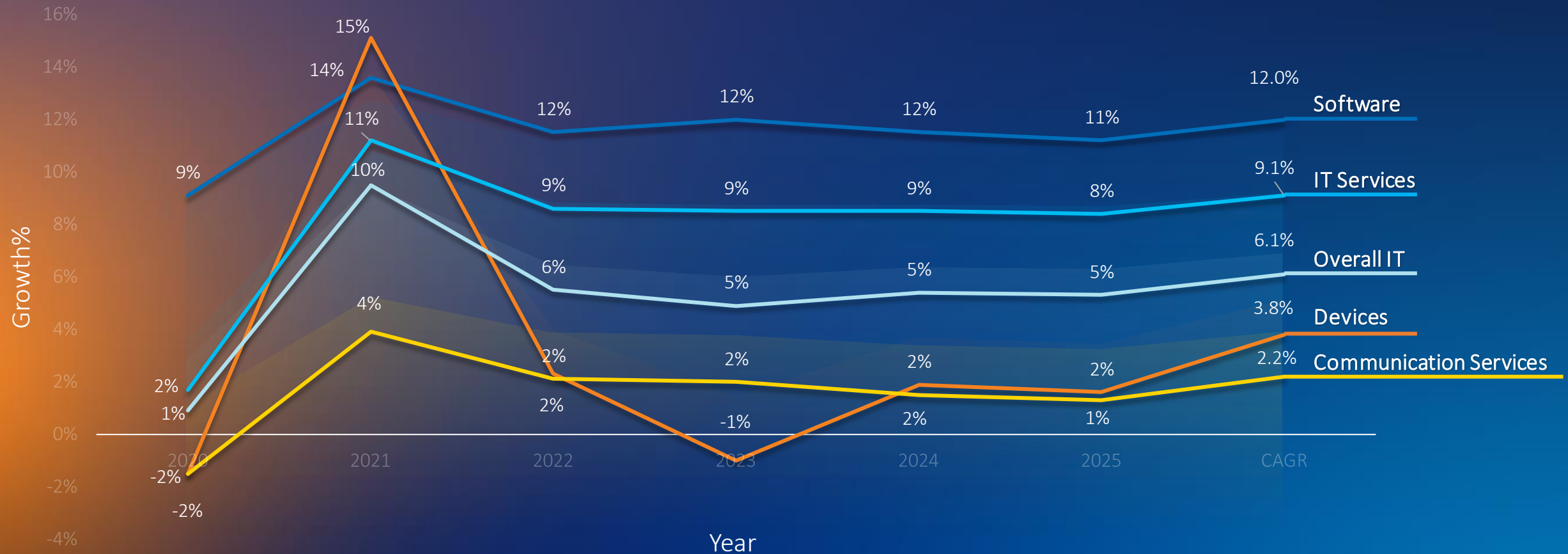
\*Source: Brand Finance IT Services 25 2021 Report (Jan 2021)

# Looking ahead...



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

Year on Year Growth in IT Spending Worldwide, FY19 – FY25













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



# IT Spend Projection

in LTI's existing Sweet Spots

| Vertical                  |  Energy & Utilities |  Banking |  Insurance |  HiTech Media & Services |  Consumer Goods & Life Sciences |  Manufacturing & Natural Resources |
|---------------------------|--|---|---|---|--|---|
| CAGR Forecast FY19 - FY25 | 10%  | 7.1%  | 6.7%  | 6.4%  | 5.8%   | 3.2%  |

| Service Line              |  IaaS (Cloud) |  ERP / SCM / CRM |  Analytics and Business Intelligence |  Application Implementation and Managed Service |
|---------------------------|--|---|---|--|
| CAGR Forecast FY19 - FY25 | 32.3%  | 11.8%   | 10.1%   | 5.6%   |

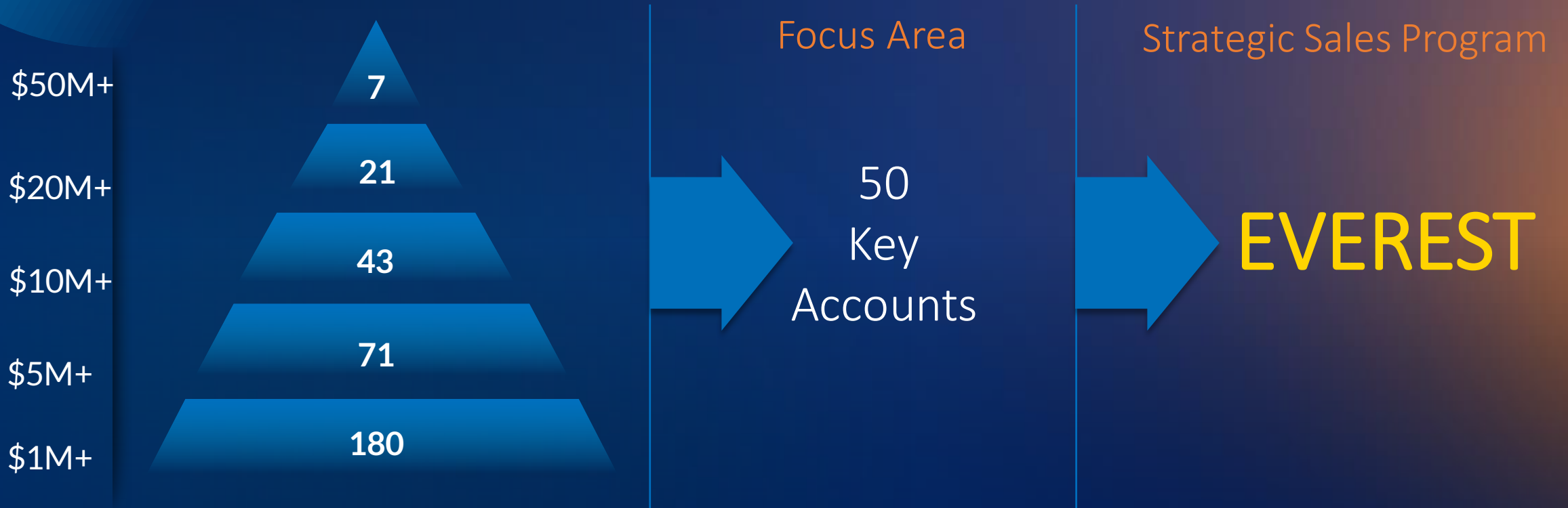
Source: "Gartner (October 2021)" (G00759428)

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

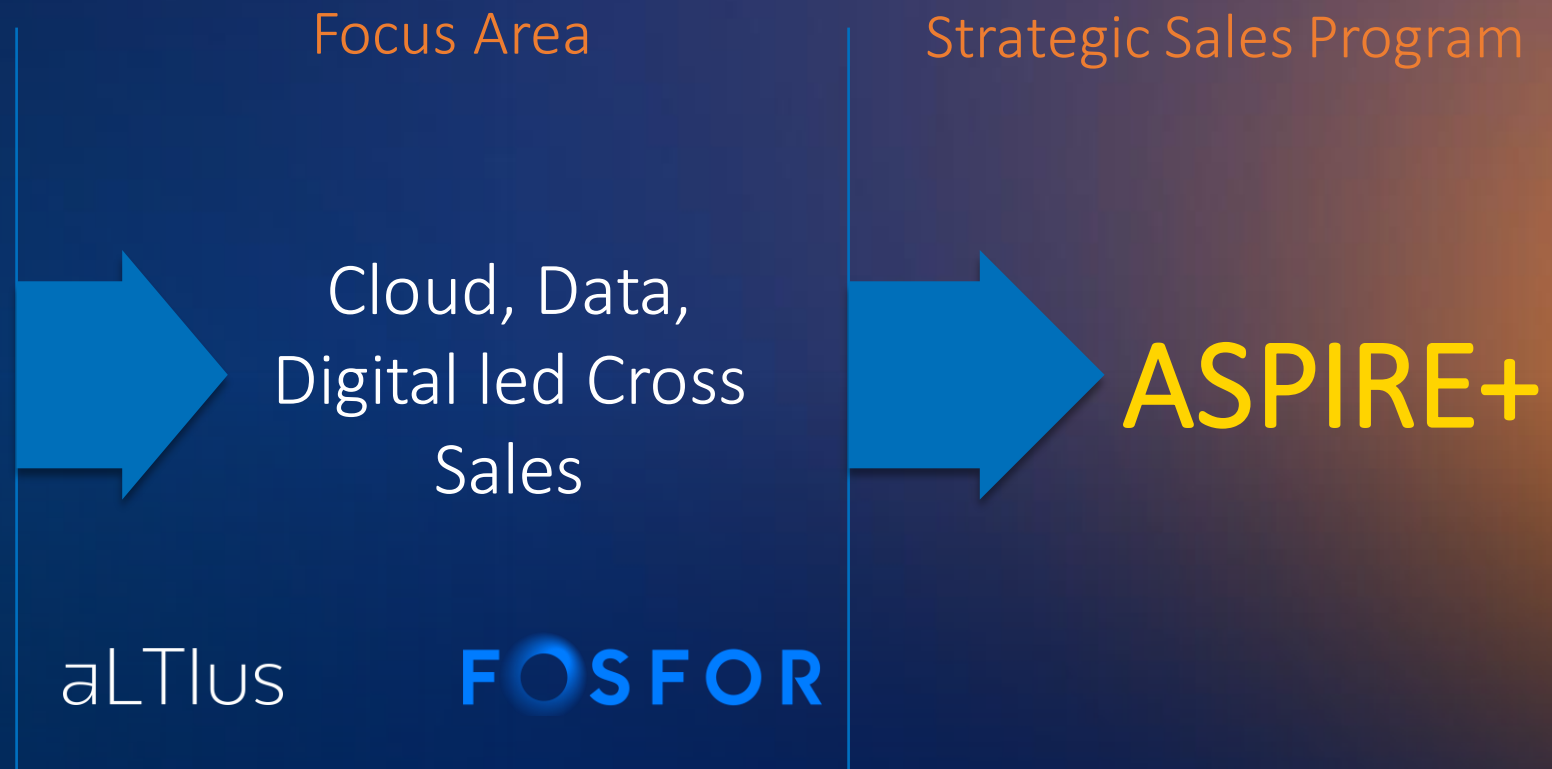
126 opened in last 6 quarters

## High Potential Sub-Verticals

Eg. BioTech, Streaming, Payments,  
InsureTech

## New Growth Regions

UK, Australia, Switzerland, Middle East



# Incubate

New Growth Engines

New Verticals / Sub-Verticals  
eg. Green Energy, EVs, Metaverse

Next generation Technology companies  
eg. Lookr, Xceptor, O9, Freshworks, etc.



# Incubate New Growth Engines

## Digital Solutions – Renewables

|      |   |   | High           | > 1 Bn                            | Medium                  | ~500Mn | Low | < 300 Mn |
|------|---|---|----------------|-----------------------------------|-------------------------|--------|-----|----------|
| Sr # | Solution  | Description   | Existing / New | Partner / Own                     | Market (Potential –HML) |        |     |          |
| 1    | Drone 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            | EADFLOW, MEASURE                  | High                    |        |     |          |
| 2    | Grid Optimization for Distributed Solar/Wind Farms (Blockchain based solutions) | With distributed generation and huge variation in supply , grid optimization will be very essential part of Solar/Wind power. Microgrids will need common accounting book (Blockchain based) to manage transactions. As per G&S Analysts this is a High Potential area  | New            | Unidata, EnergyNautics, 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 Grids 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 G&S Analysts think it could have Unlimited opportunities | New            | AutoGrid, NEMOS                   | 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            | Nikola                       | 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            | ICM Energy Energus/Travis CI | 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            | AutoGrid, 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            | TAACE                        | Low                     |
| 5    | Energy storage as a Service   | Battery storage manufacturing is growing fast. Battery manufacturers are collaborating with producers, consumers and regulators to provide ESaaS. This segment is looking for Digital solutions for battery manufacturing for cost optimization, supply chain optimization and to manage ESaaS.           |          |        | New            |                              | Low                     |
| 6    | Smart manufacturing for battery. Supply chain tracking and optimization     | Automation, robotics, manufacturing operations systems OT/IT 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 (Sphera, ERA, Enablon, Velocity GHG) | 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 GLS, 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 (Honeywell, AspenTech)                   | 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 AGLS to fugitive/GHG leak detection.  | Existing       | Partner (ESA, 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 it's 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 /SAP Sustainability Tower) | Most of our clients and energy companies use SAP and SFDK 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  |
|----------------------------|---|--|
| EDITION                    | Solar / Wind<br>Drone based remote monitoring           | Lithuania based company has Aerodiagnosics solutions for aerial inspection and aerial object recognition. Computer vision and machine learning technologies provide the foundation to video data analysis to analyse real world data.<br><b>Partnership Opportunity</b> : Build Built-On solutions, Integration services, Configuration/Implementation service   |
| MEASURE                    | Solar / Wind<br>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 2021, Measure was acquired by AgEagle Aerial Systems Inc. , an industry leading drone solutions provider<br><b>Partnership Opportunity</b> : LTI to use this platform and build remote monitoring and inspection applications for solar and wind farms.                            |
| nel *, McPhy<br>PLUGPOWER  | Green H2 : Electrolyser, Fuel Cell OEM                  | Nel / McPhy are OEM for electrolyzers while PLUGPOWER is OEM for Fuel cell.<br><b>Partnership Opportunity</b> : Connected products - AI/ML based analytics for predictive maint, realtime condition monitoring. Partnership among LTI as EPC vendor, OEMs for electrolyzers and fuel cells and LTI for digital solutions using OT/IT for realtime monitoring and predictive maintenance.   |
| Utilidata,<br>Energnautics | Energy Management<br>Smart grid solutions               | Utilidata is US based energy technology company provides a grid-edge operating platform that delivers the essential capabilities for running the clean, modern grid. Energnautics is Germany based company provides consultancy services for smart grid, grid optimization, modeling & simulation for power generation.<br><b>Partnership Opportunity</b> : LTI to explore partnership opportunities with both, to provide end to end grid solution from consulting to smart grid. |
| AutoGrid                   | Energy Management<br>Virtual power plants,<br>Microgrid | US based company has wide range of solutions for solar + storage, Microgrids, renewable trading, EV , virtual power plants.<br>LTI to explore partnership for implementation and support. Global customers include Shell, Total, National grid, NEXtera, Schneider.<br><b>Partnership Opportunity</b> : LTI can become implementation and support partner for solution like virtual power plants, Solar+storage, Microgrids.   |
| ICN Energy                 | Battery Analytics<br>Battery management system          | Mumbai based ICN 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<br><b>Partnership Opportunity</b> : Possible target for acquisition.  |
| Honeywell /<br>AspenTech   | Asset performance                                       | Honeywell and AspenTech asset performance solutions are widely used in Energy and renewable industry.<br><b>Partnership Opportunity</b> : Extend partnership to provide end to end asset performance solutions for distributed power generation units for renewables.  |
| TRINCE                     | Battery simulation and<br>Analytics                     | Germany based company has products for battery simulation and predictive analytics for energy storage services.<br><b>Partnership Opportunity</b> : Provide end to end service using their product.  |



# Finally...



LTI

# Large Deal

Pipeline

2.07 Bn

44% from New Logos





# LTI

Let's Solve