

**September 2, 2021**

National Stock Exchange of India Limited  
Exchange Plaza, Bandra-Kurla Complex  
Bandra (East), Mumbai – 400 051.  
NSE Symbol: LTTS

The BSE Limited  
Phiroze Jeejeebhoy Towers,  
Dalal Street, Mumbai- 400001  
BSE Script Code: 540115

**Sub:- Investor Presentations**

**Ref: Our letters dated August 2, 2021 and September 1, 2021**

Dear Sirs,

This has reference to our letters dated August 2, 2021 and September 1, 2021. Pursuant to Regulation 30 of the SEBI (Listing Obligations & Disclosure Requirements) Regulations, 2015, we are enclosing herewith a copy of the Investor Presentations of the virtual Investor/Analyst Day held today, i.e. September 2, 2021 which will also be available on the website of the Company ([www.ltts.com/investors](http://www.ltts.com/investors)).

Please take the above intimation on record and kindly acknowledge the receipt of the same.

Thanking You,

Yours sincerely,

**For L&T Technology Services Limited**



**Kapil Bhalla**  
**Company Secretary**  
**(M.No. F3485)**

# #EngineeringScale

 Keynote Address 

  
Amit Chadha

Chief Executive Officer  
& Managing Director

INVESTOR & ANALYST DAY (IAD) 2021

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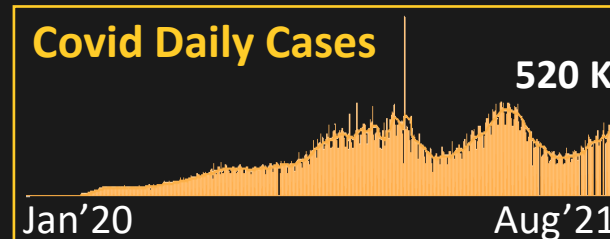
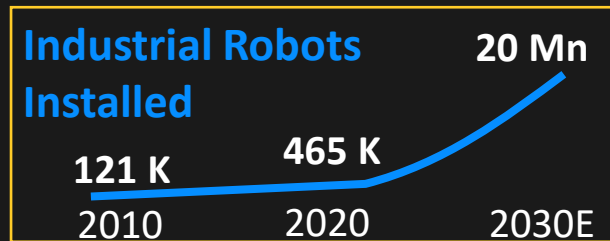
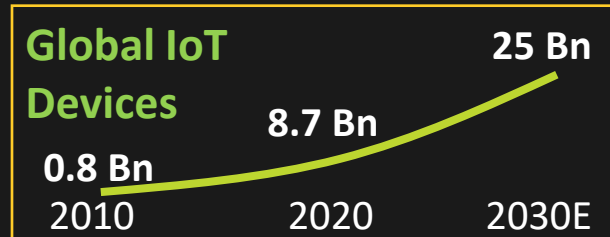
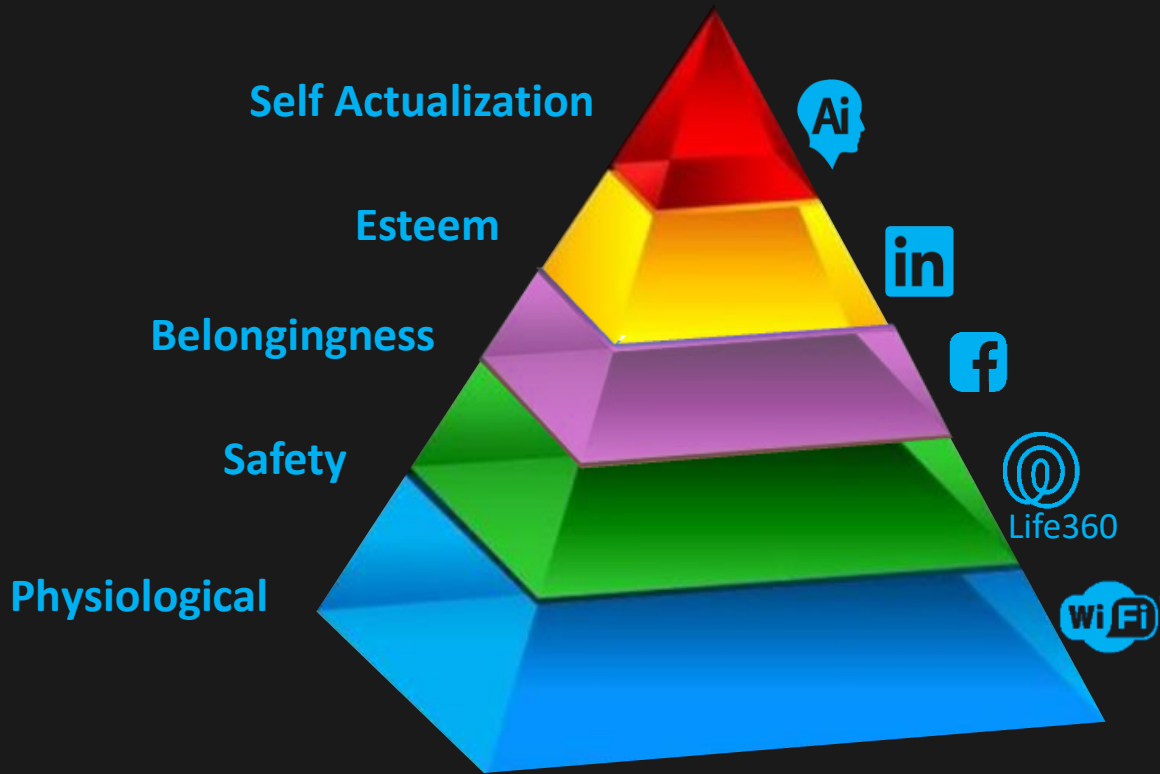
# AGENDA

- 01  **Technology Disruption in Our Day and Age**
- 02  **LTTS, a Reflection**
- 03  **Vision for Future**
- 04  **Strategy and Way Forward**
- 05  **In Summary**

# THE HIERARCHY OF HUMAN NEEDS IS BEING REPURPOSED

Maslow's Hierarchy of needs

In a rapidly Disrupting World...



Has Created Opportunities to Scale with Technology

# THE WORLD IN 2030

## Benefits of connected Home tech



**75%** will use remotely monitored devices & voice activated appliances



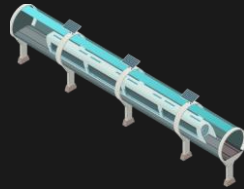
### Connected Home Tech

1. Energy Efficiency
2. Security
3. Sustainable Homes
4. Home as an Office

## Transportation & Tech. Breakthroughs



**71%** expect use of fully electric vehicles



**51%** feel they will travel by hyperloops



**4G → 5G,6G**

## Technology led Healthcare Revolution



**83%** believe in personalized preventive plans

**80%** Fully Electronic Recorded Systems

**80%** Diagnostic At-Home Apps.

## New ways in Factories, Brick & Retail



**20 Mn** Robots in factories





**45%** will still do Physical and co-exist with Virtual shopping



**81%** digital technologies in physical stores

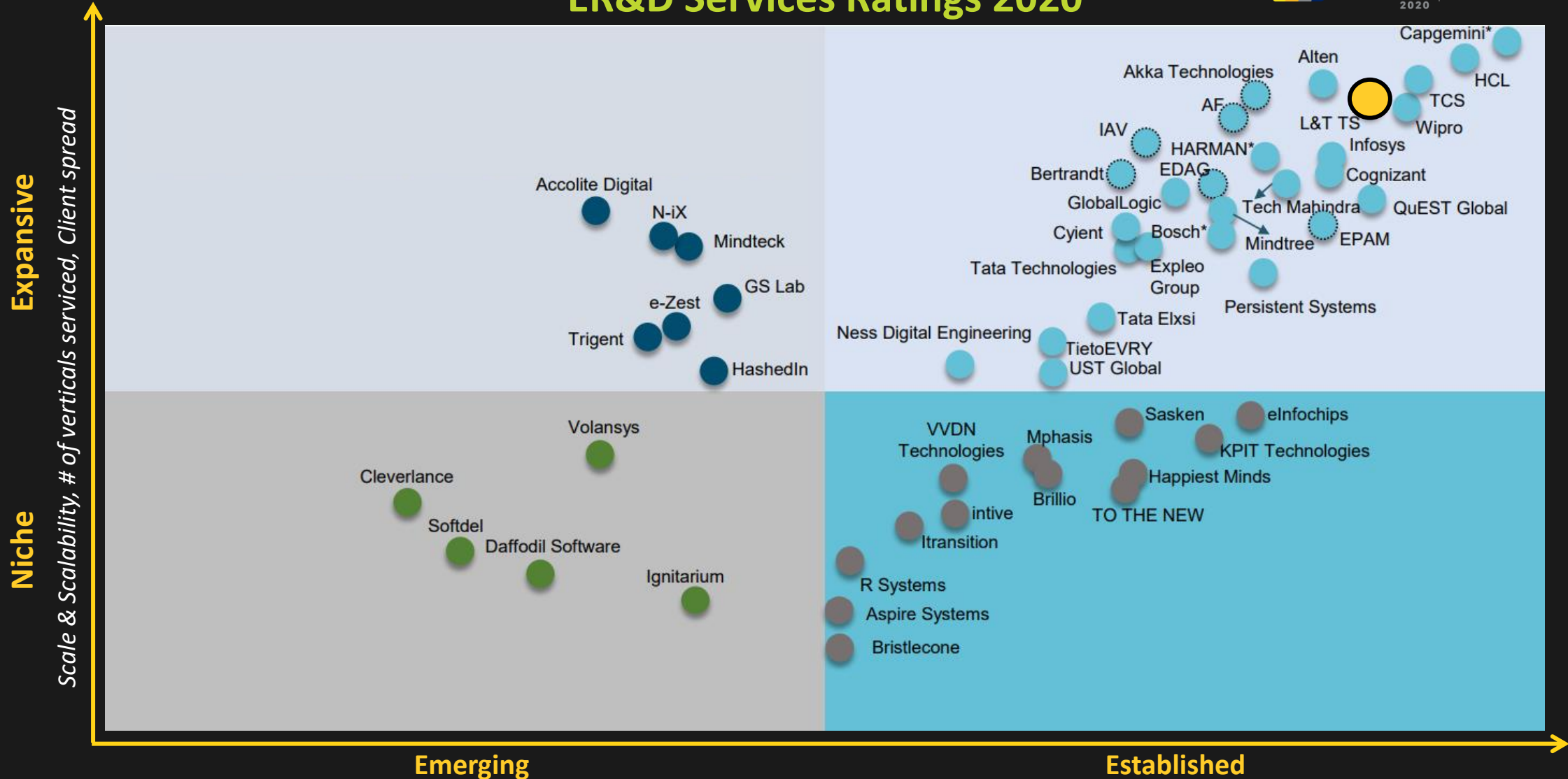
# OUR JOURNEY: THE THRUST TO PROPEL BEYOND ORBITAL VELOCITY...

## Built on a Strong Foundation

	FY17	FY18	FY19	FY20	FY21
<b>Milestones</b>	Listed on  Launched Digital	<b>1<sup>st</sup> \$100 Mn</b> Deal (Hi-Tech)	 MAHATMA AWARDS For CSR	“Best Company for Excellence in Services” IACC	<b>2<sup>nd</sup> \$100 Mn</b> Deal (O&G)
<b>Footprint Expansion</b>	Auto proximity site, Dublin, OH	Security practice, Jerusalem, Israel	Digital Engg. Center, Gothenburg, Sweden	ITAR Design Engg. Centre, Rockford, IL	Transportation COE, Munich, Germany
<b>Acquisitions</b>	 VLSI in Bay Area		 Semcon in India		 Hi-Tech in NA
<b>Revenue</b>	\$484 Mn	\$580 Mn	\$723 Mn	\$786 Mn	\$737 Mn
<b>EBIT</b>	16.1%	13.0%	16.0%	16.5%	14.5%
<b>Clientele</b>	223	235	251	270	306
<b>Patents</b>	254	328	399	502	650

# MEASURING UP AGAINST OUR COMPETITION

## ER&D Services Ratings 2020

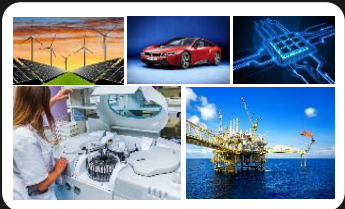


Specialization, R&D practice maturity, Innovation & IP, Eco-system linkages, Customer Input



# WE ARE READY TO PIVOT TO OUR NEXT GROWTH TRAJECTORY...

## Largest Pure-play Engineering Services Company from India



**5**

Segments



**4**

Horizontals



**Digital**

@54% of Revenue



**57 of 100**

Top Spenders as Clients



**CTO office**

incubating  
Next-Gen Solutions

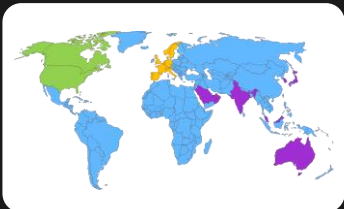


**719**

Patents



**Innovation  
Culture**



Presence in  
**Key Geos**

**Re-affirmed  
Go-forward  
Strategy**

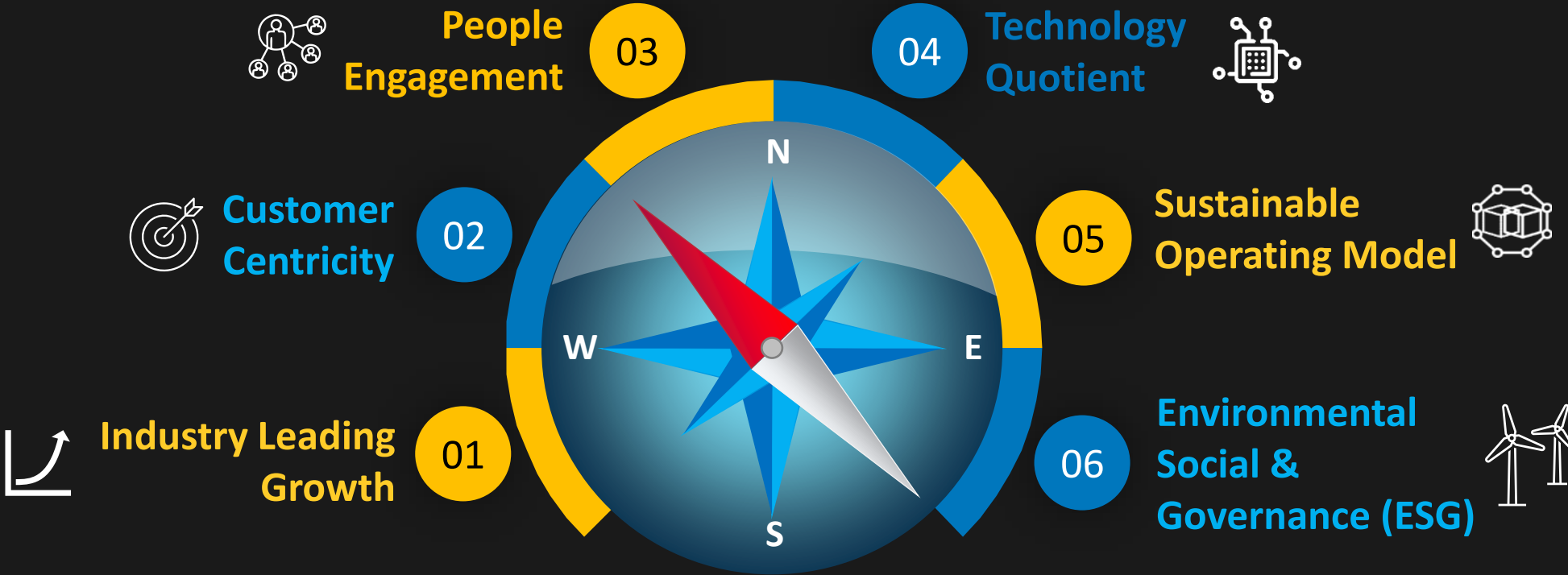
**Strengthened  
Operating  
Model**

**Curated  
Technology  
Stacks**



Our Vision: Be amongst the  
**Top 5 Global Pure Play Engineering  
Services Provider** of choice

# OUR "6 DIMENSIONAL" GLIDE PATH



**Profitable, Sustainable & Inclusive Growth**

**#EngineeringScale**

# WE ARE INVESTING IN SIX STRATEGIC GROWTH AREAS...

# 6

# BIG BETS



**01 EACV**  
25% of Cars to be EV by 2025E



**02 MedTech**  
\$200 Bn by 2025E



**03 5G**  
\$155 Bn by 2025E



**04 AI & Digital Products**  
\$100 Bn by 2025E



**05 Digital Manufacturing**  
\$475 Bn by 2025E



**06 Sustainability**  
\$400 Bn by 2025E

# MEDTECH: ENGINEERING HEALTHCARE FOR A BETTER TOMORROW

## MedTech Offerings



### Device Engineering

- Product Design Services
- Software Engineering
- Value Engineering
- Product Testing, Sustenance Support



### Digital & Decision Support

- Digital Platform: Development, Customization, Support and Manage
- Clinical Apps development
- Cloud & IoT Platform Adoption
- Advanced Analytics



### QARA regulatory standards

- Regulatory Compliance
- Risk Management | Complaints Mgmt.
- Product Quality

## Next-Gen Solutions



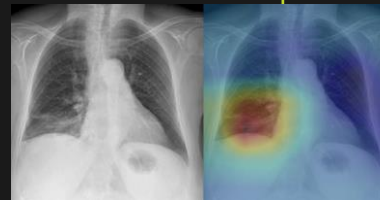
Infection Management Platform



Endotrainer



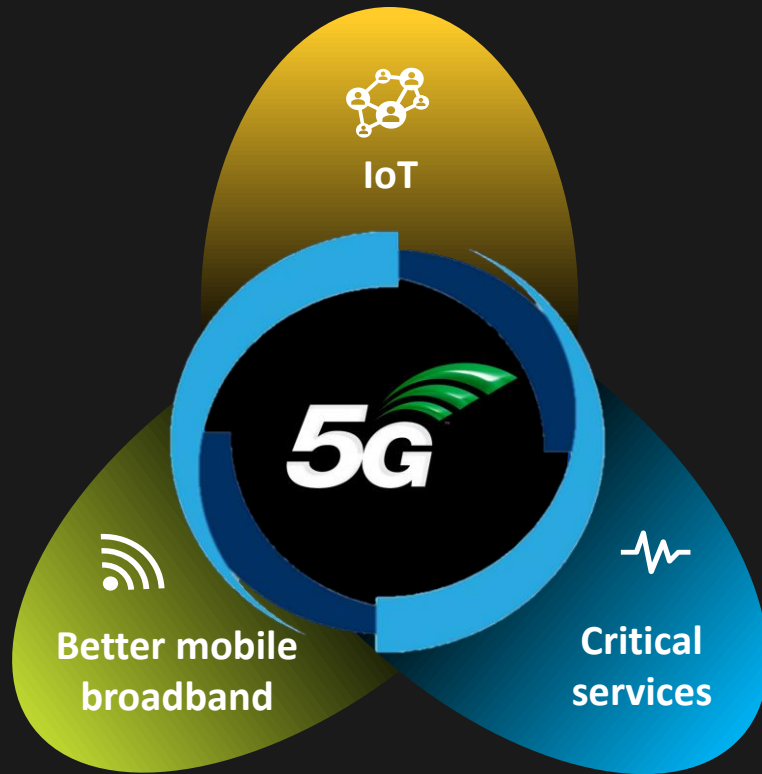
Low-cost Ventilator



Chest-rAi™ Solution



# 5G: THE NEXT FRONTIER IN RELIABLE AND FAST CONNECTIVITY



## LTTS as Engineering Partner in

### NPD (Device & Chip)

- 5G Device Design & Integration
- 5G Chip Design

### Private Networks

- Pvt. Network Deployment Services
- MEC Applications
- Managed Services

### Network Assurance

- Network Design & Deployment
- Service Assurance

### Lab-as-a-Service

- Network Assurance, QoS across Multi-vendor Multi-technology Networks

### End 2 End Test & Automation

- E2E Testing (Chip to Cloud), Certification support
- IntelliAgent™ for 5G

# THE WORLD IS EMBRACING SUSTAINABILITY, AND WE ARE READY...

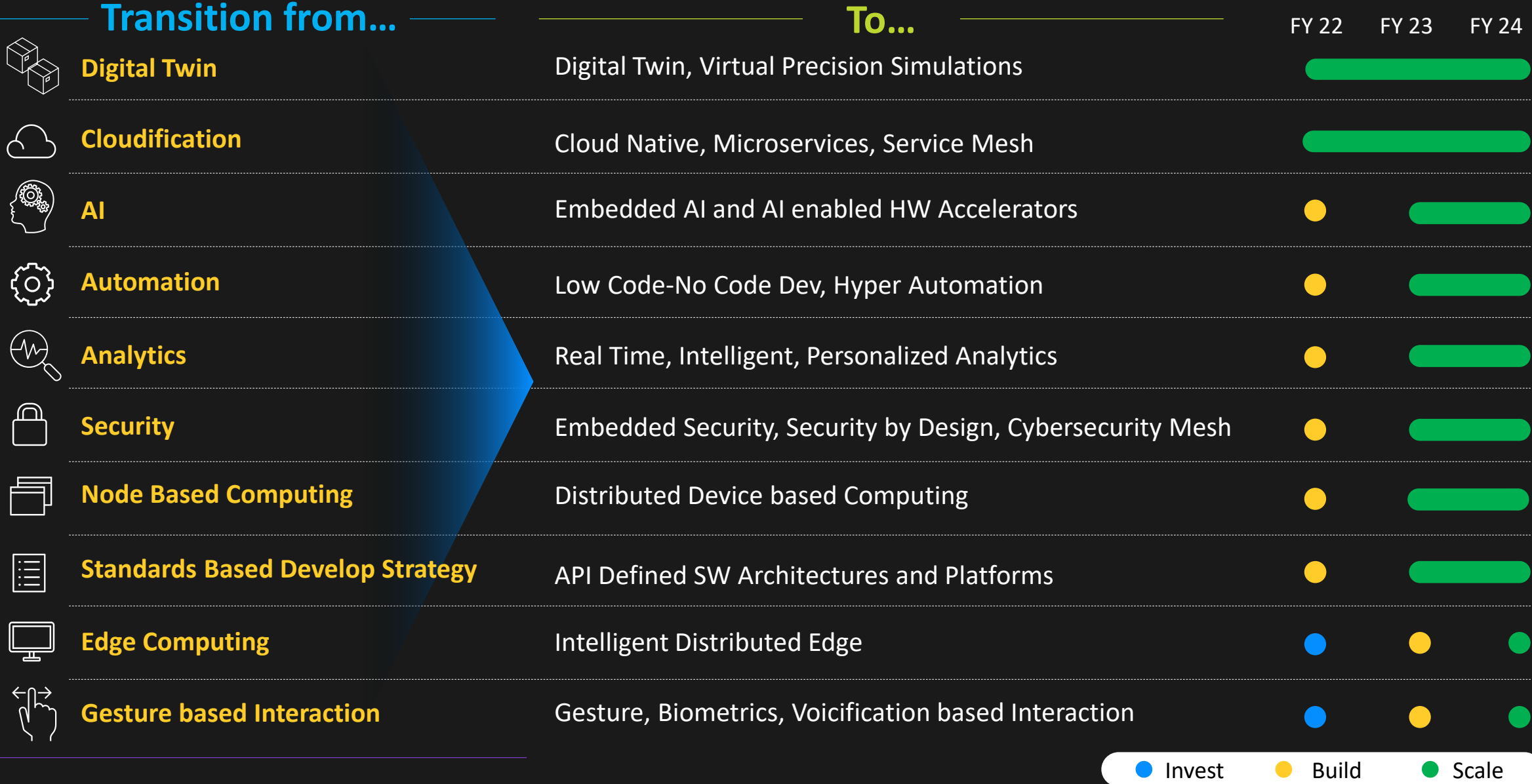
## UN Sustainable Development Goals



☑ Sustainability goals with Engineering Footprint



# WE CONTINUE TO SCALE SOFTWAREZATION IN PRODUCT ENGINEERING



● Invest    ● Build    ● Scale



# EXPERIENCED AND PROVEN GLOBAL LEADERSHIP TEAM



CEO & MD



CSO  
Americas & Asia



EU



India & ME



Large Deals



COO & WTD



CFO



CTO



CHRO



CMO



Strategy



Transportation



Industrial Products



Hi-Tech



Plant Engg.



Medical



Digital Mfg.



Digital S/w Prods.



Embedded



Mechanical



Delivery Offsite NA



Delivery Offsite EU

*Delivery Excellence*

Verticals

Horizontal

*Next-Gen Competencies*

Client centricity

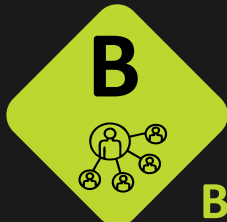
Sales

# DEVELOPING LEADERS FOR TOMORROW



## Affiliative Leadership

Promote positivity & Celebrate Collaboration with Teamwork



## Build & Nurture High Performers



## Create Technical Trailblazers

Collaborate with leading academia for Technology Leadership



# OUR COMMITMENT TO SOCIETY



Makeshift Hospital for Covid-19



Building Disaster Resilient Homes



24/7 Free ICU Ambulance Service



Revitalizing Parched Lands through Watershed Management



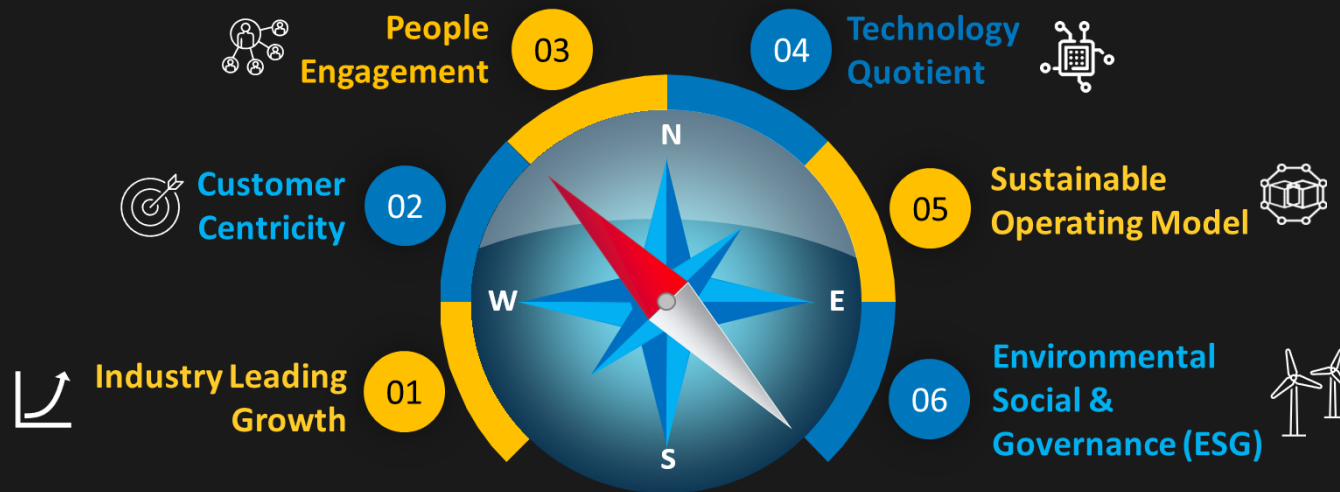
Preventive Measures for the Underprivileged against Cancer



Empowering Tribal Women through Skill Building

# IN SUMMARY...

We have Chartered our Journey to Scale with a  
**6-Dimensional Glide Path...**



**Profitable, Sustainable & Inclusive Growth**

**#EngineeringScale**

...and aim to reach  
**\$1Bn** run rate by

**Q2-Q3 FY23**

&

**\$1.5Bn** run rate in FY25  
with **18%** EBIT

**THANK YOU**



# #EngineeringScale



 Engaging Customers   
For Profitable Growth

Alind Saxena

Chief Sales Officer - Americas & Asia

INVESTOR & ANALYST DAY (IAD) 2021

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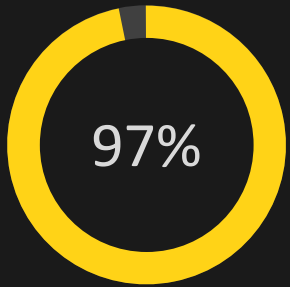
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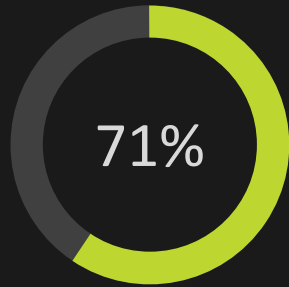
# CHANGING MARKET CONDITIONS...

**NASSCOM<sup>®</sup>**

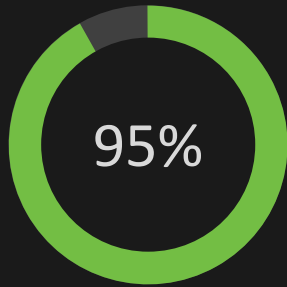
**CEO Survey 2021**



Expect **Global Economic Growth** To Be Better than 2020



Expect **Global Technology Spend** To Be Significantly Higher than 2020



Expect **2021 Hiring** To Be More Than What They Hired In 2020

**“ “ NOKIA**

*“We have decided that we will invest whatever it takes to win in 5G”*

- Pekka Lundmark  
President and CEO, Nokia

**“ “ Medtronic**

*“We've increased our investments at the front-end of major product launches and surgical robots...”*

- Geoffrey Martha  
Chairman & CEO, Medtronic

**“ “ gm**

*“We increased our EV and AV investments to \$27 billion from 2020 through 2025”*

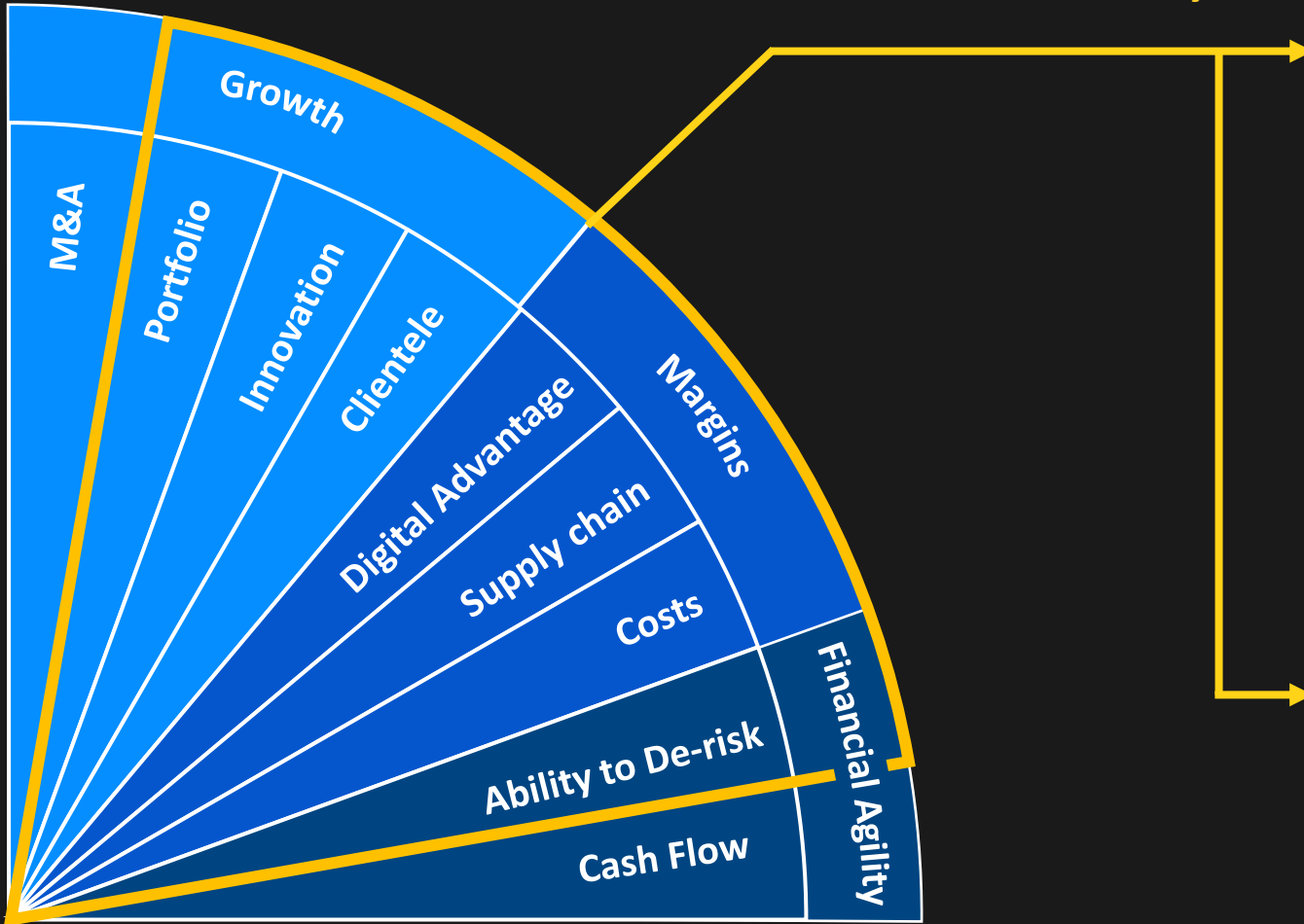
- Mary Barra  
Chair and CEO, GM

**“ “ Shell**

*“Shell will be shifting its long-term focus from oil and gas to selling renewable energy”*

- Ben van Beurden  
Chief Executive, Shell

# ...LEADING TO CHANGING CUSTOMER NEEDS...



## DIGITAL ENGINEERING

### Engineer Digital Products

- Connected products: Edge | Secure | Integrated
- Collaborative products: Smart IoT | DevOps | SecOps
- Intuitive products: Embedded AI | High Performance

### Leverage Digital in Engineering Processes

- Asset Reliability Center
- Industrie 4.0
- AI enabled processes

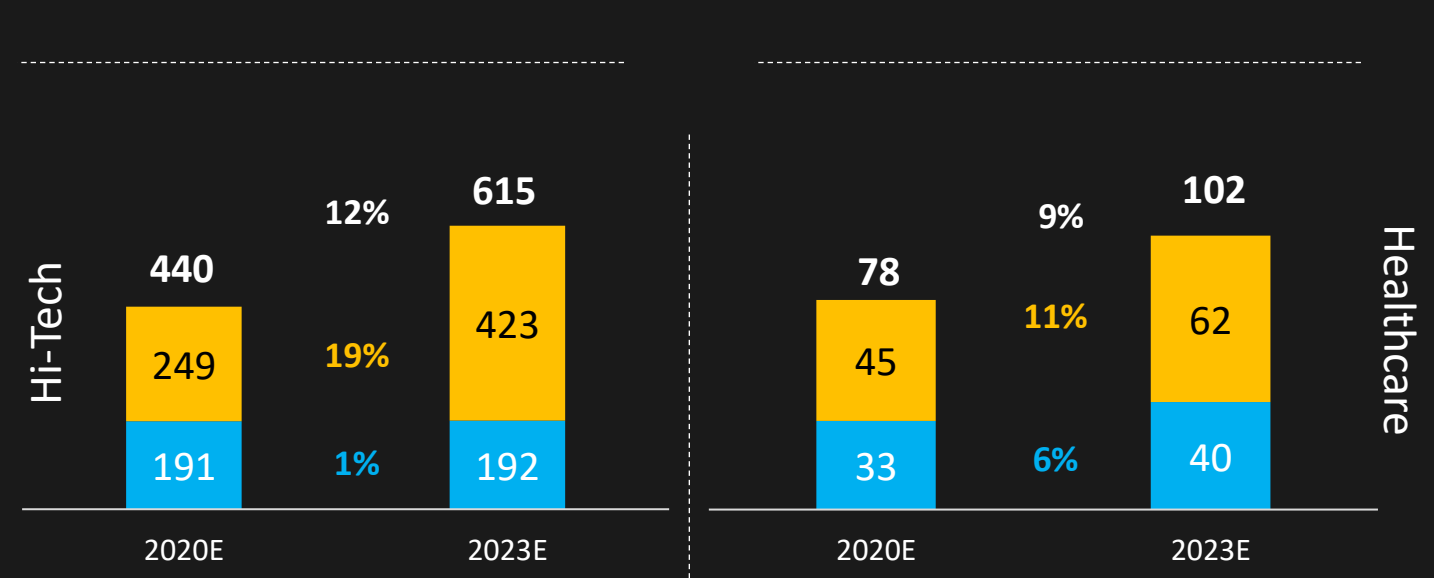
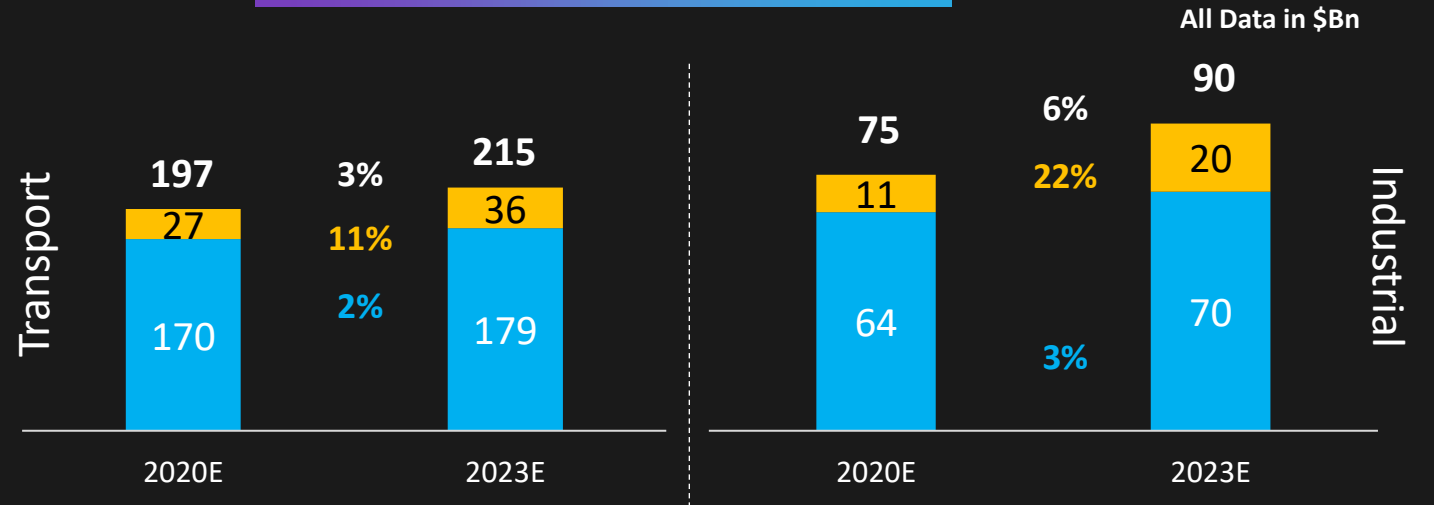
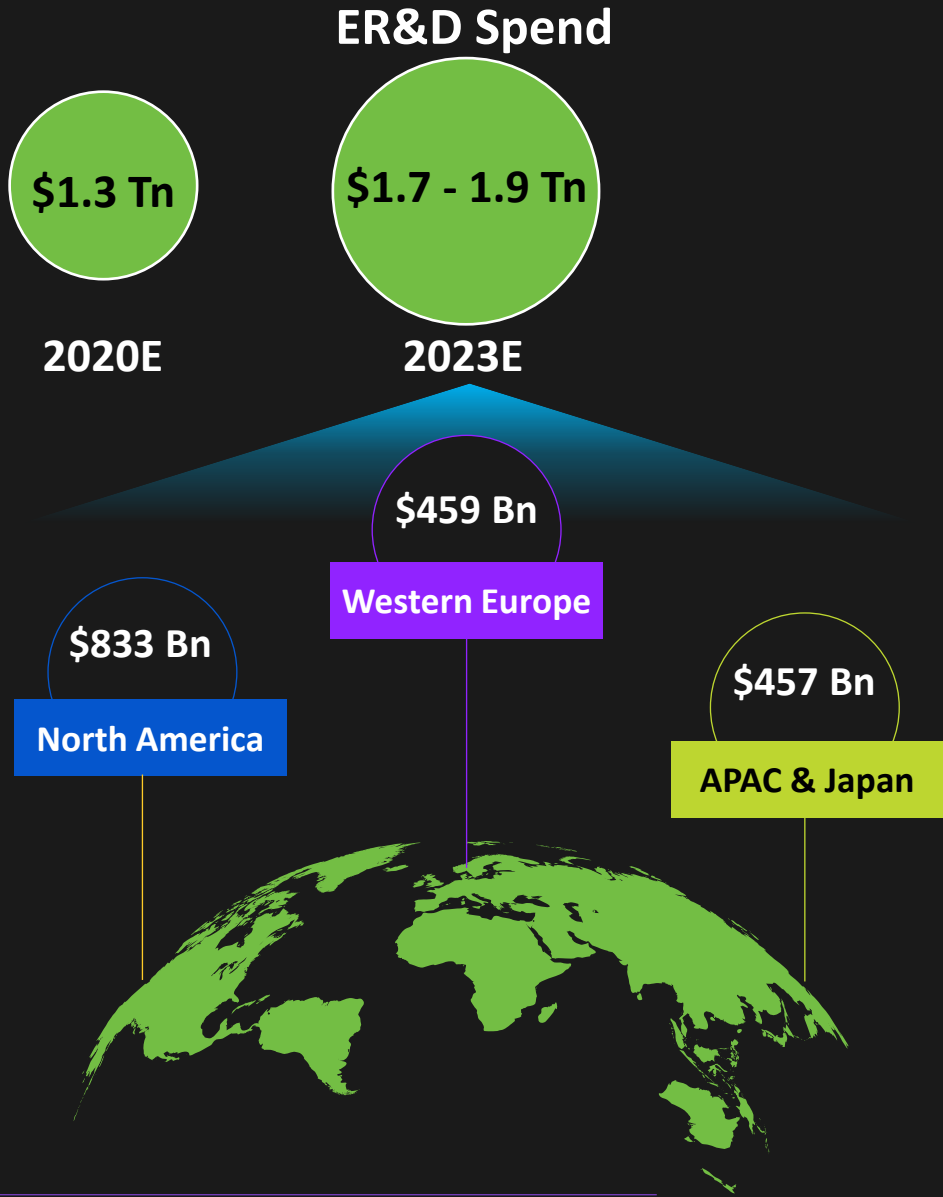
## LEGACY ENGINEERING

### Legacy Engineering Services

- Plant Engineering
- Frugal Engineering
- Value Engineering
- NPD | Engg. Support | Manufacturing Support



# ...GENERATING SIGNIFICANT DEMAND IN DIGITAL ENGINEERING



■ Digital Engineering
 ■ Legacy Engineering

# “CUSTOMER CENTRICITY” CORE TO OUR INDUSTRY LEADING GROWTH

01



**SUPER-SIZING ACCOUNTS**

02



**MEGADEALS**

03



**ADJACENTS**

04



**GEO STRATEGY**

# SUPER-SIZING ACCOUNTS...

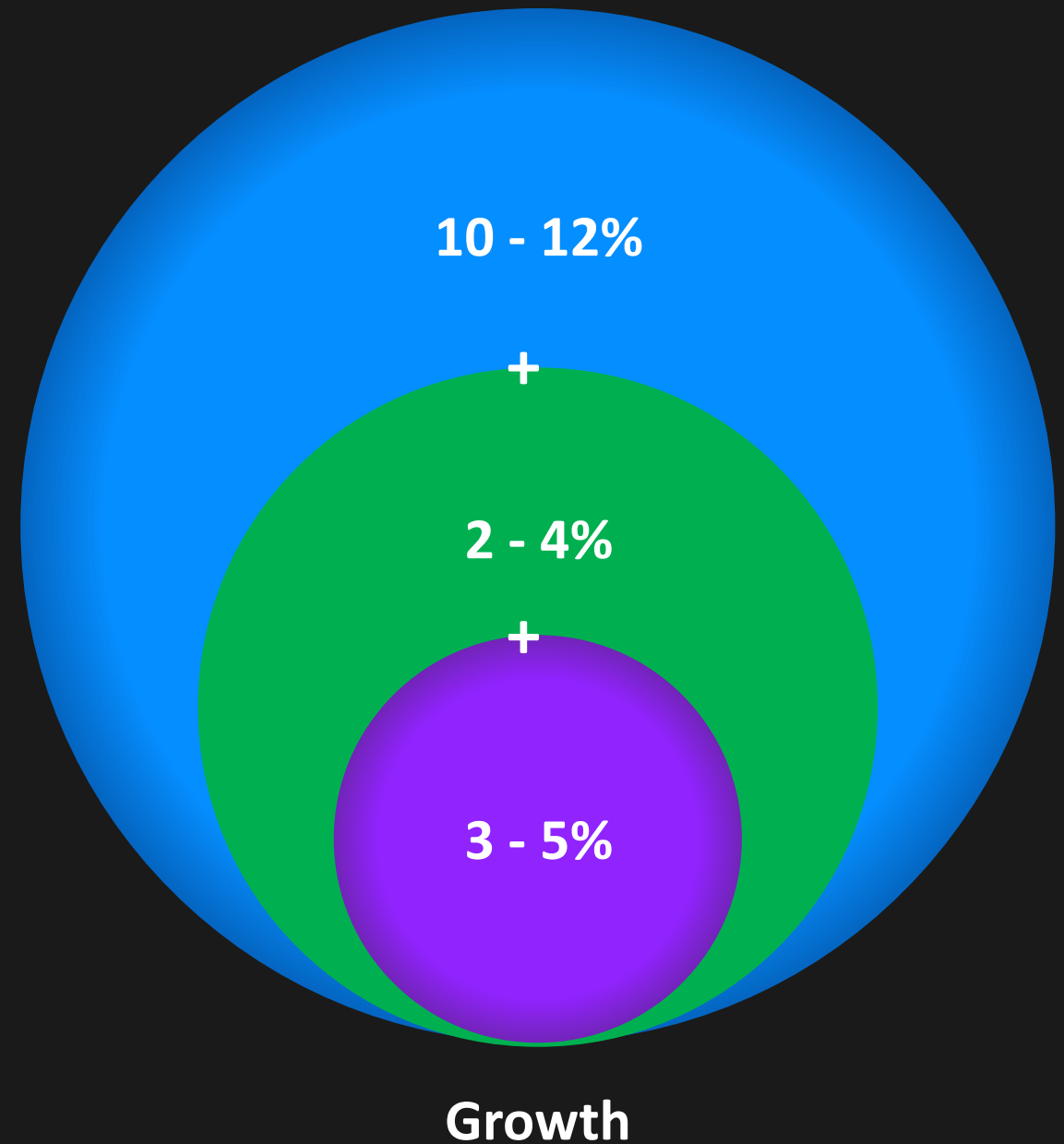
Solutioning with Partners

New Client Personas

Carve Outs Products/Labs/Services

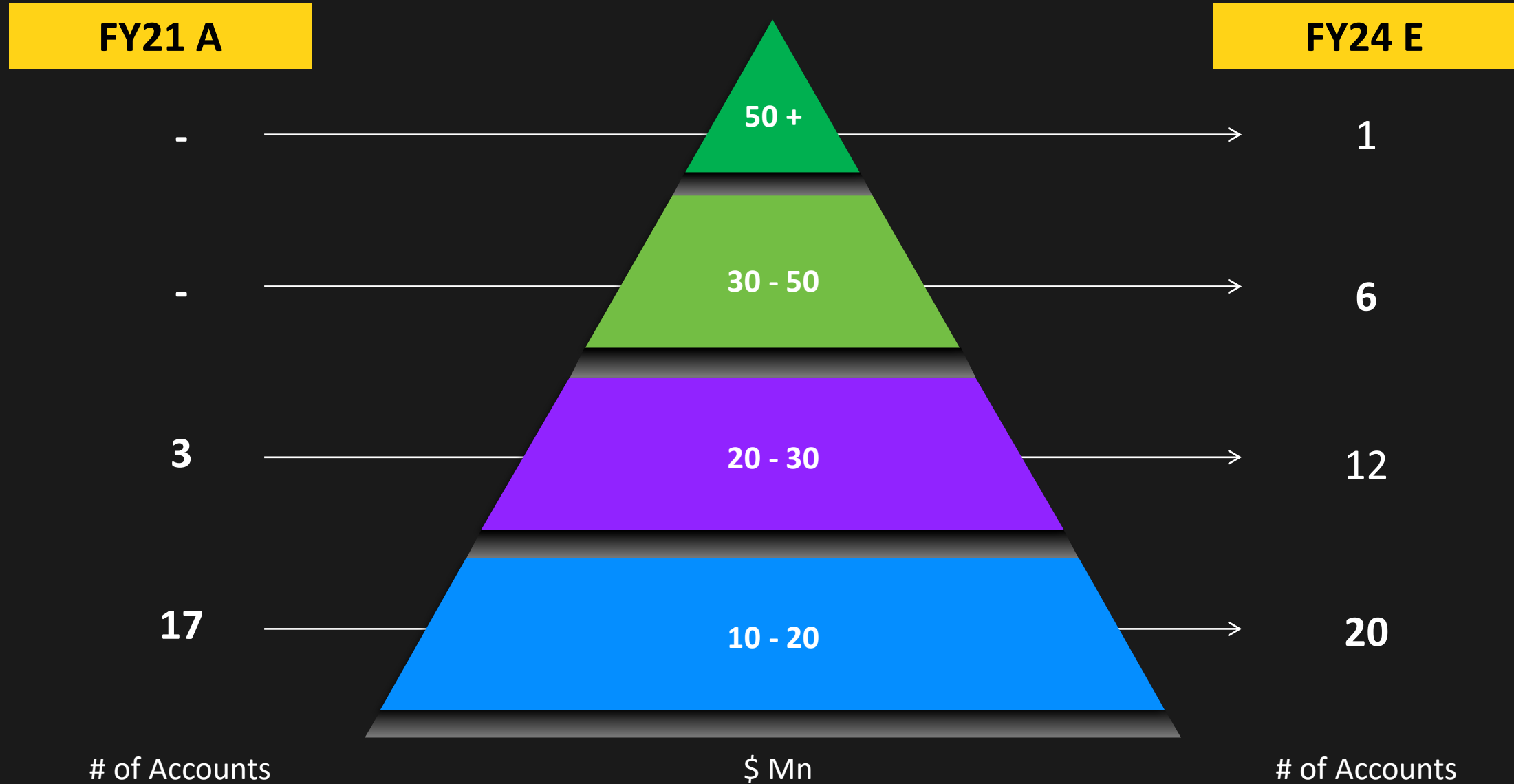
Broaden Regions and Divisions

Delivery Led Growth

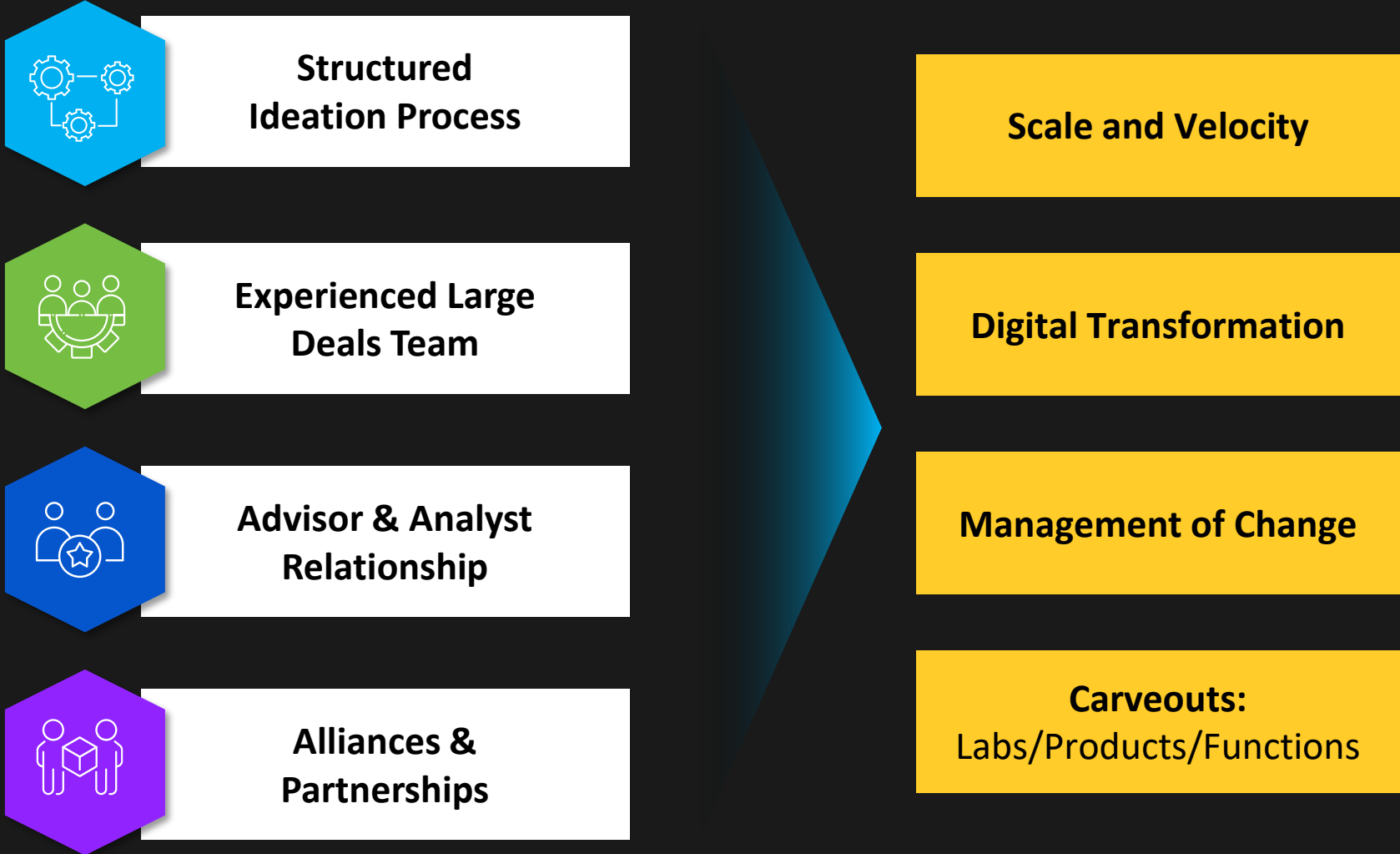


# ...FOR OUR ACCELERATED GROWTH

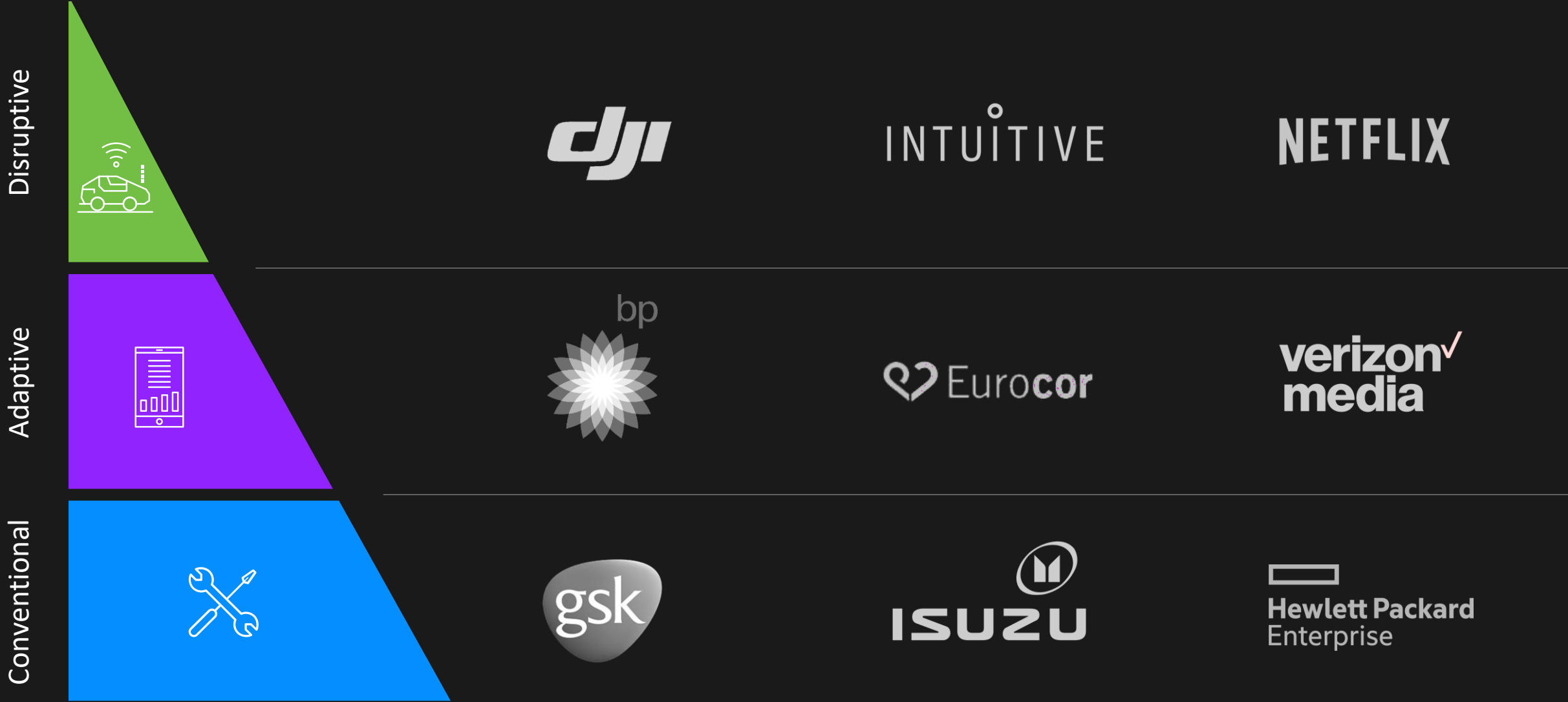
01



## The Proven Combination



# ART OF WORKING WITH ADJACENTS



Illustrative companies

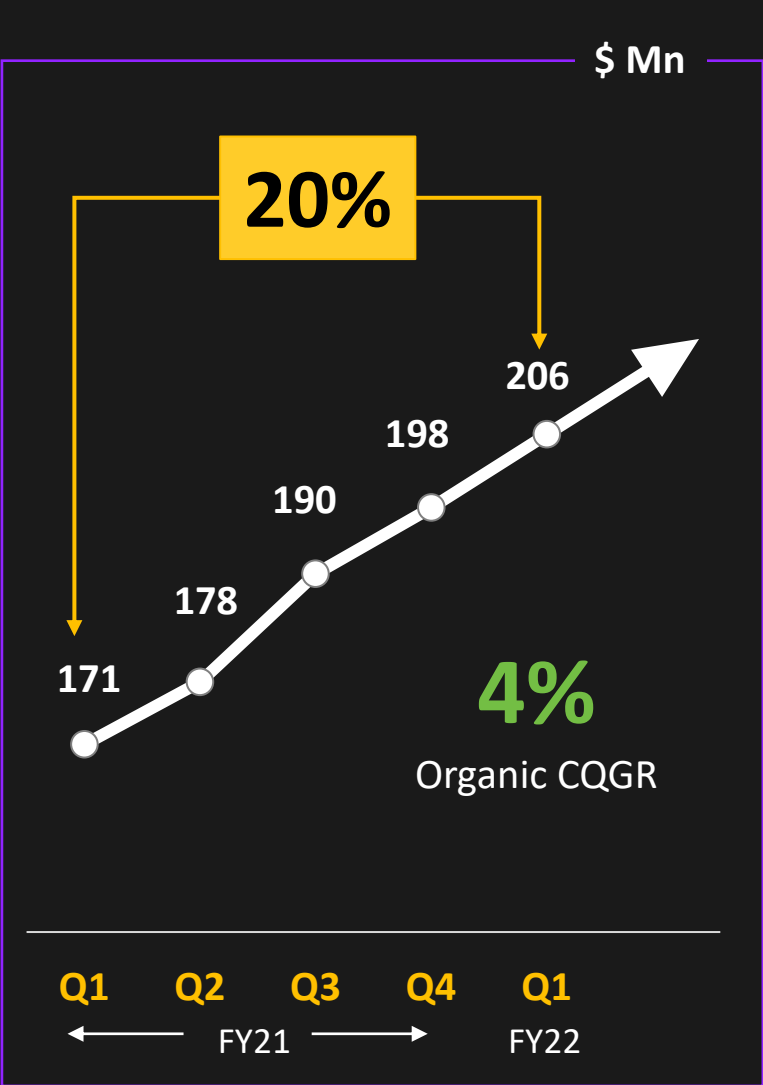


Strengthen Proximity Centers through  
**Leadership, Local SMEs and Ecosystem Partners**



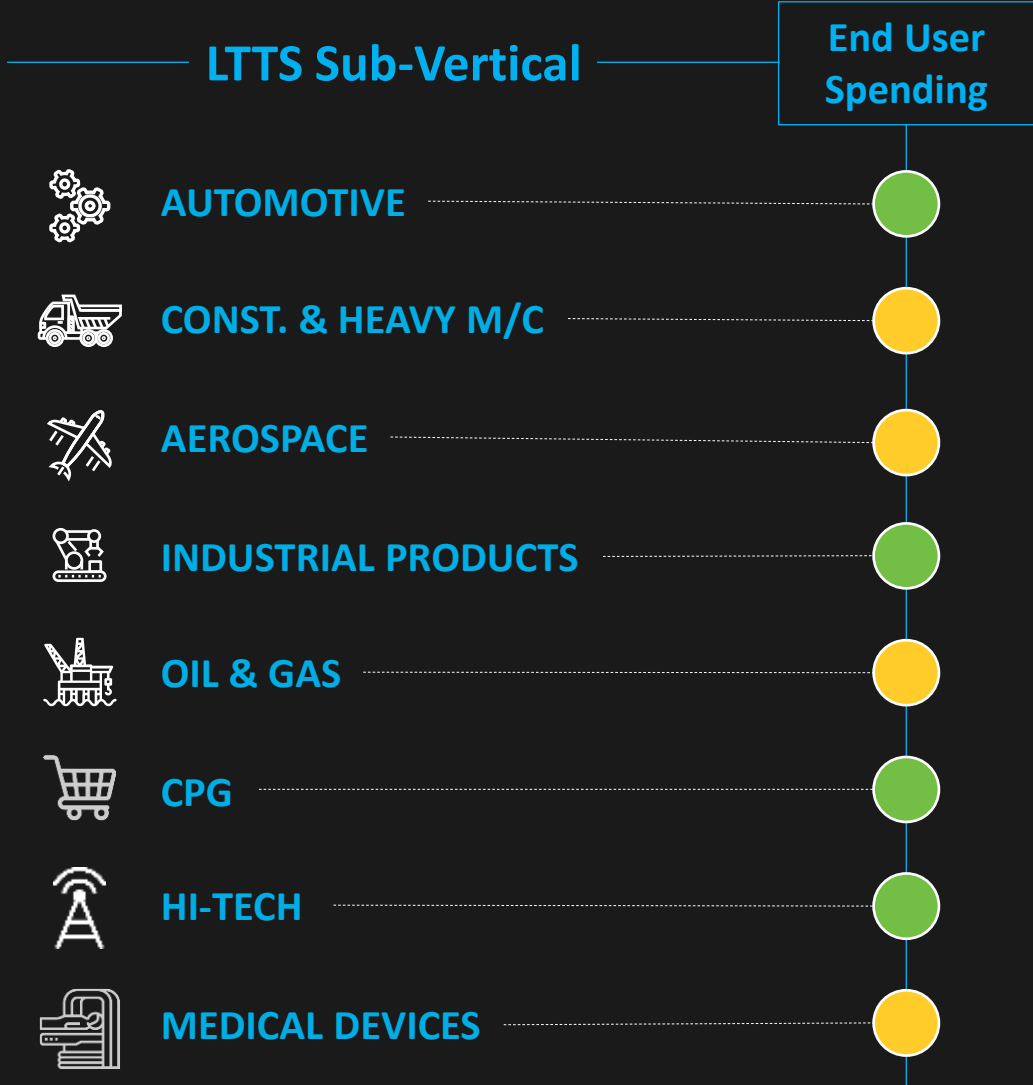
Expand **Medical & Hi-Tech**  
**in Europe**

# GROWTH IN LAST 4 QUARTERS...



**YoY Growth %**  
Q1 FY21 v/s Q1 FY22

TRANSPORT	<b>19%</b>	
INDUSTRIAL	<b>21%</b>	
PLANT ENG	<b>35%</b>	
HI-TECH	<b>18%</b>	
MEDICAL DEVICES	<b>10%</b>	



Neutral      Favorable



# ...LARGE, MULTI-YEAR ENGAGEMENTS...

**39\***  
Large Deals



**19**  
New Logos



**NORTH AMERICA**

**EUROPE**

**ROW**

**72%**

**21%**

**8%**

**40%**

**40%**

**20%**

**\$100Mn** Contract from  
Global Oil and Gas Firm

**Design and Development Partner**  
For NA EV Automotive OEM

**End-to-end 5G Automation Services**  
Contract from Global Telecom Tier-1

\*Last 4 Quarters – 5M+ Deals

# ...AND WINS ACROSS STRATEGIC AREAS



**Electric,  
Autonomous,  
Connected Vehicles**



**MedTech**



**5G**



**AI &  
Digital Products**



**Digital  
Manufacturing**



**Sustainability**

**Wins In  
Big Bets\***

4

1

3

7

8

-

**Deals  
Pipeline**

16

12

5

6






7

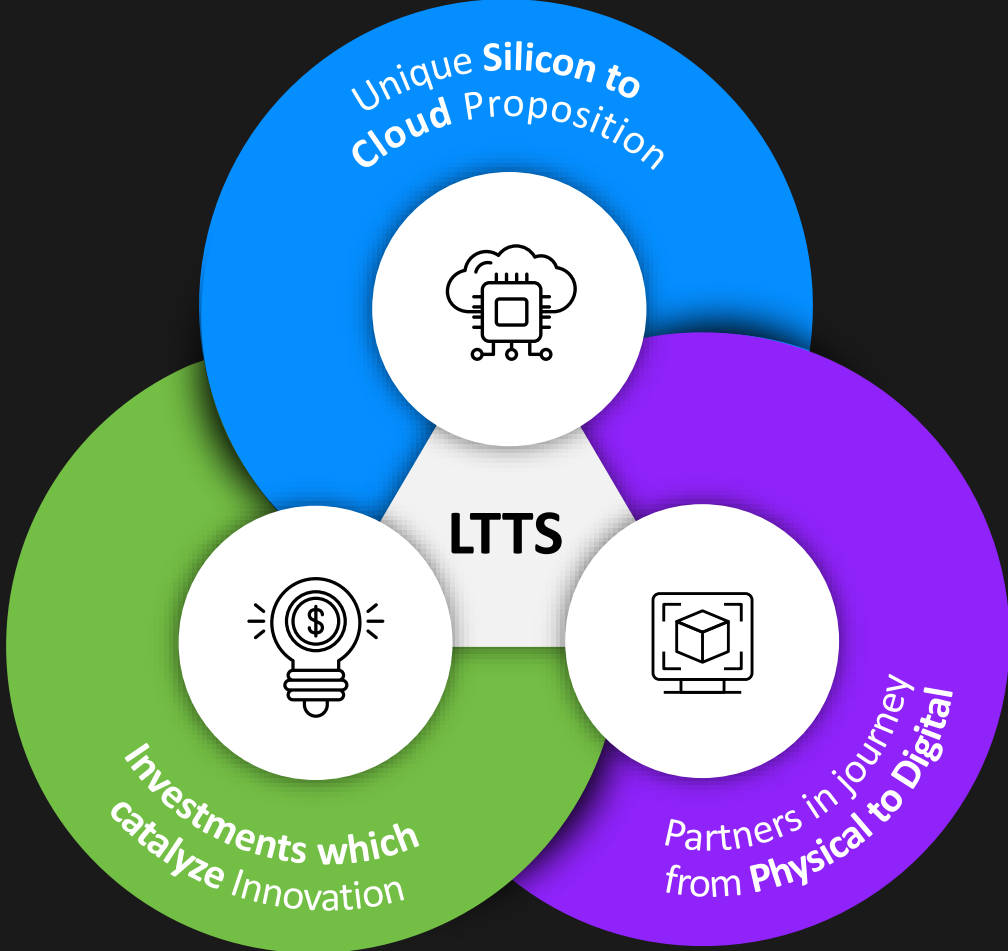
5

\*Last 4 Quarters – 5M+ Deals

# PREFERRED PARTNER FOR FUTURE-DRIVEN ORGANIZATIONS

**57**  
of Top  
100 R&D  
Spenders

	<b>TRANSPORT</b> <b>8</b> OF TOP 10
	<b>INDUSTRIAL</b> <b>7</b> OF TOP 10
	<b>HI-TECH</b> <b>8</b> OF TOP 10
	<b>HEALTHCARE</b> <b>3</b> OF TOP 5
	<b>PLANT ENGINEERING</b> <b>7</b> OF TOP 10



**THANK YOU**

# #EngineeringScale



SUSTAINABLE OPERATING  
MODEL

Abhishek Sinha

Chief Operating Officer & Whole  
Time Director

INVESTOR & ANALYST DAY (IAD) 2021

# DISCLAIMER

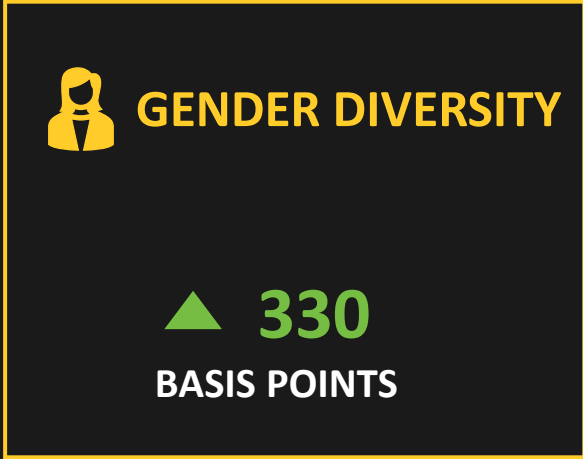
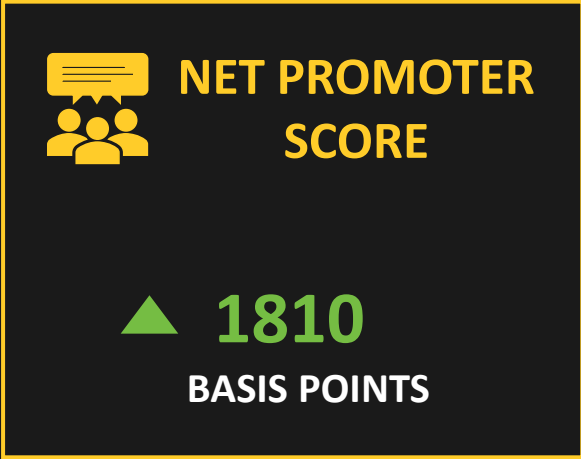
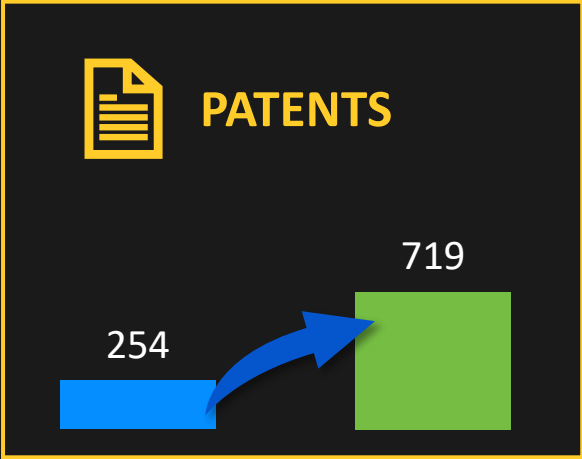
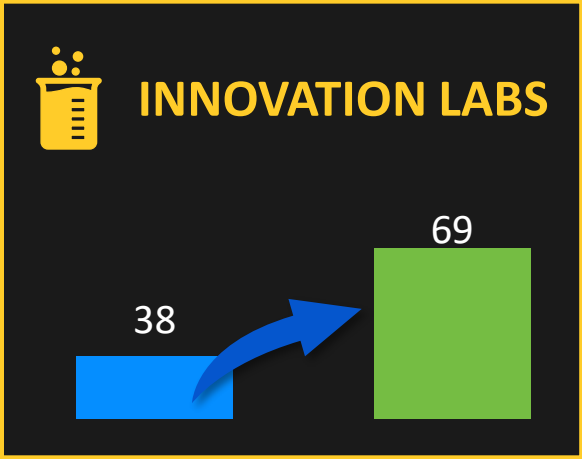
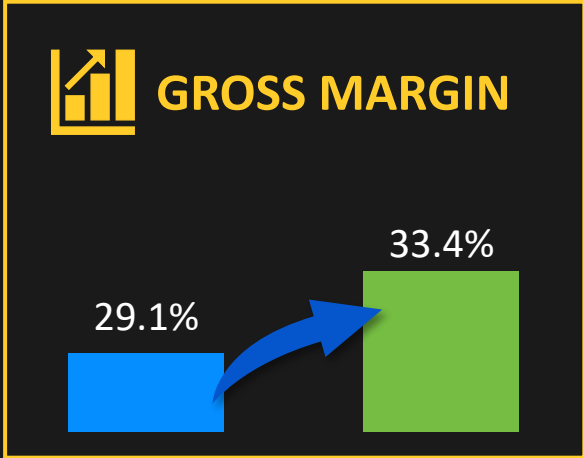
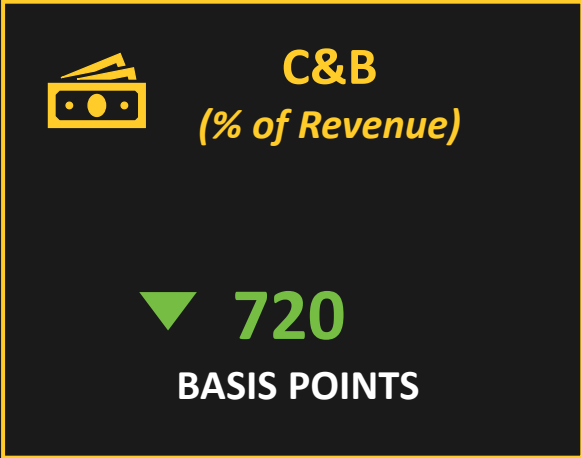
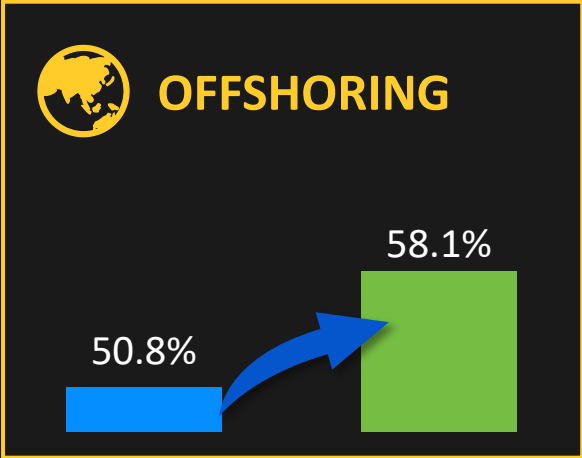
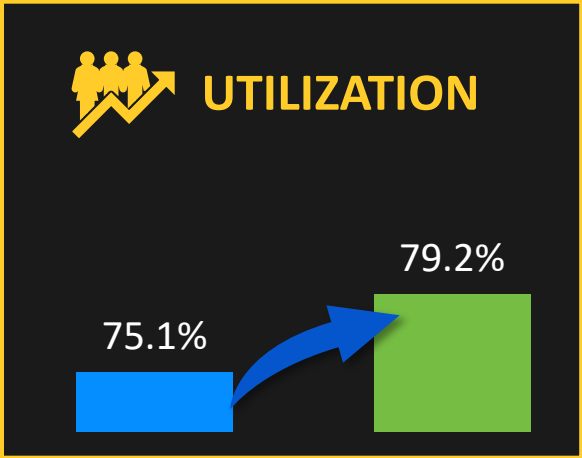
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# OUR OPERATIONAL EXCELLENCE STORY OVER THE YEARS\*...



\*From Q1 FY18 to Q1 FY22



LTTS recognized as "Best Company for Excellence in Services" by Indo-American Chamber of Commerce

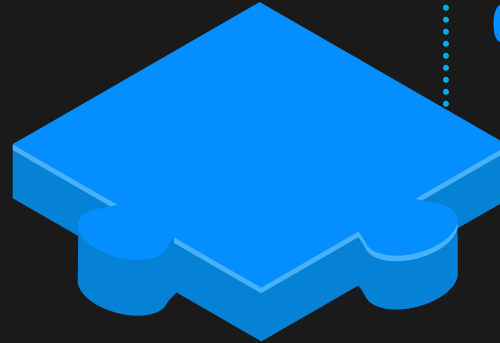
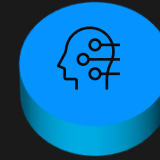
# ... FOUNDED ON THE 4 TENETS OF "ENGINEERING THE CHANGE"

TECHNOLOGY  
CELEBRATION **01**

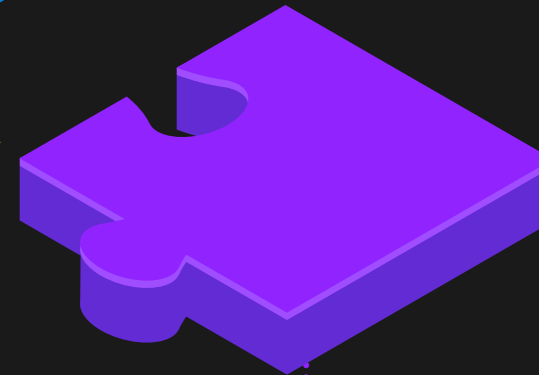


**02**

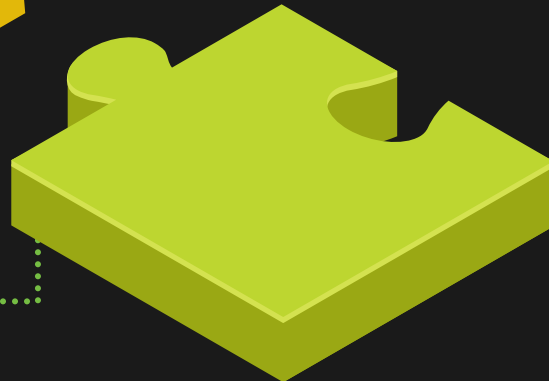
CUSTOMER DELIVERY  
EXCELLENCE



ENGINEERING  
THE CHANGE



SYSTEMS  
COGNITION **04**



**03**

TALENT  
INVESTMENT



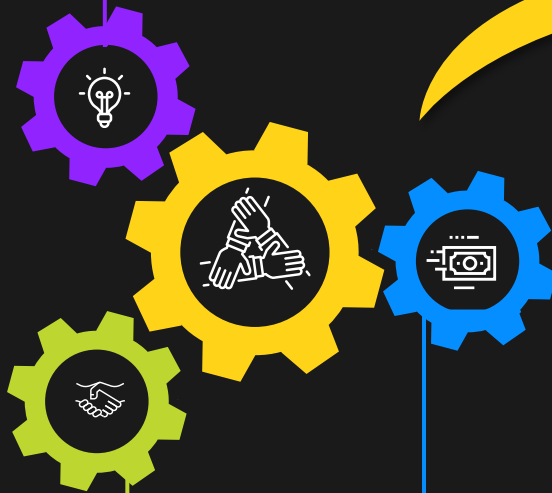


# WE BELIEVE IN CELEBRATING TECHNOLOGY EVERYDAY ...

## INNOVATION PROGRAMS

**TECHgium**<sup>®</sup>  
Engineering Innovation for Tomorrow

**REVERIES**  
FESTIVAL OF DREAMS



**6**  
BIG BETS



**01** EACV



**02** MedTech



**03** 5G



**04** AI & Digital Products



**05** Digital Mfg.



**06** Sustainability

## TECHNOLOGY PARTNERSHIPS



**Coventry University**

## STRUCTURED INVESTMENTS



Futuristic Technology



R&D Projects



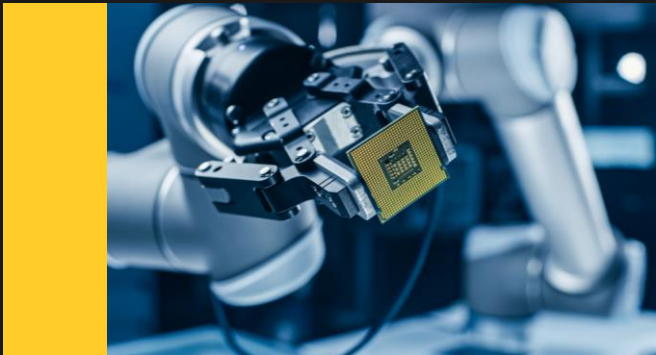
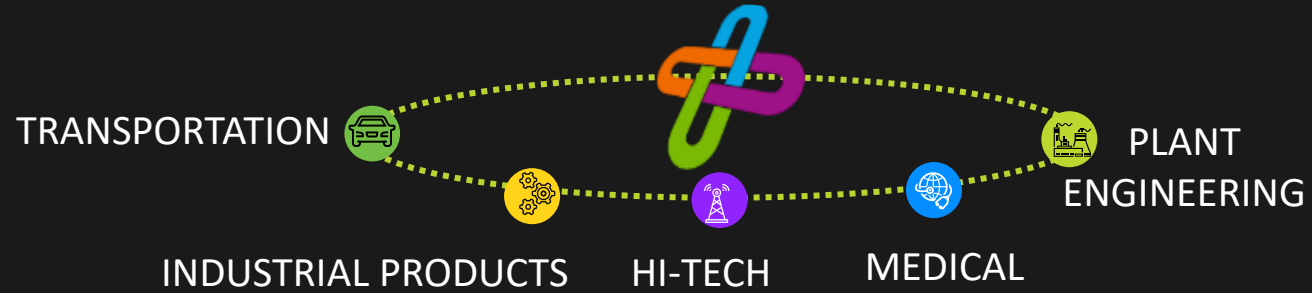
Systems



CII recognized LTTS as one of the most innovative Indian companies in the Services category in the 'Large Enterprises' segment

# ... AND CREATING CUSTOMER VALUE VIA CROSSPOLL!NNOVATION

## INNOVATION BREWING @ LTTS



5G TCU Testing from our Hi-Tech Segment for a Transportation Customer



Battery operated Autonomous Welding Robot from Industrial Products for a Plant Engineering manufacturer



Annotation Technology from Transportation being used for Imaging Medical Radiology



69 INNOVATION LABS

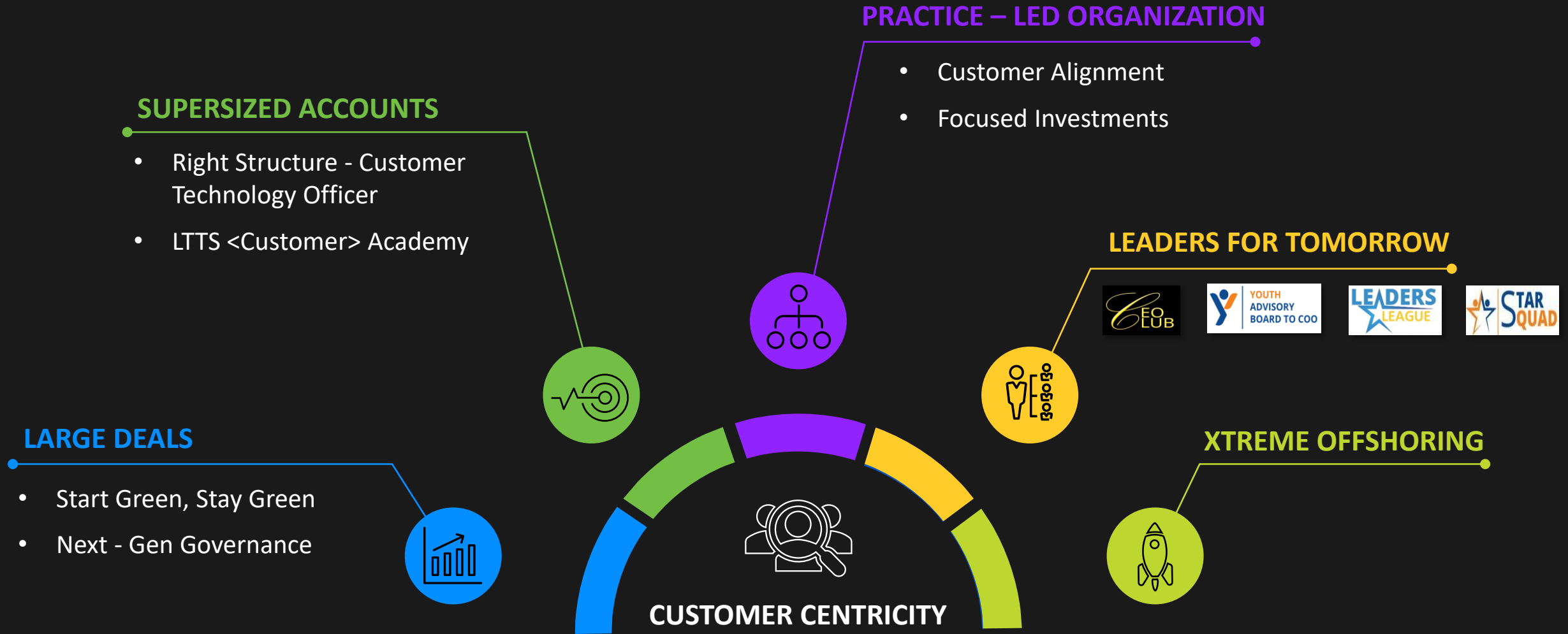


719 PATENTS



BIG Innovation Awards, USA recognized LTTS as the winner in the “Product” Category for its innovative healthcare and smart campus solutions: Chest-rAi™ & i-BEMS™, 2021

# WE ARE PRIMED FOR THE NEXT BIG LEAP ...



Zinnov rated LTTS as ‘Leader’ across Digital Engineering, IoT, AI and Digital Thread, and also named LTTS as Leader in 6 major verticals for the 4<sup>th</sup> consecutive year

# ... AS WE ENTER THE ERA OF XTREME OFFSHORING



PREDICTABLE QUALITY

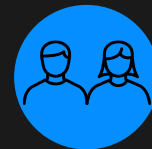
GLOBAL INDUSTRY  
SPECIFIC STANDARDS



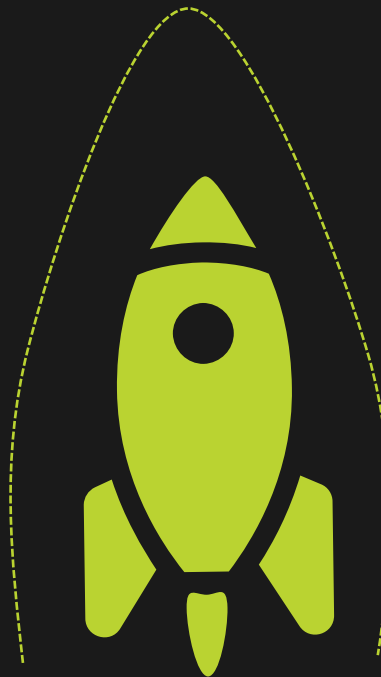
DIGITAL CONNECT  
FOR CUSTOMER



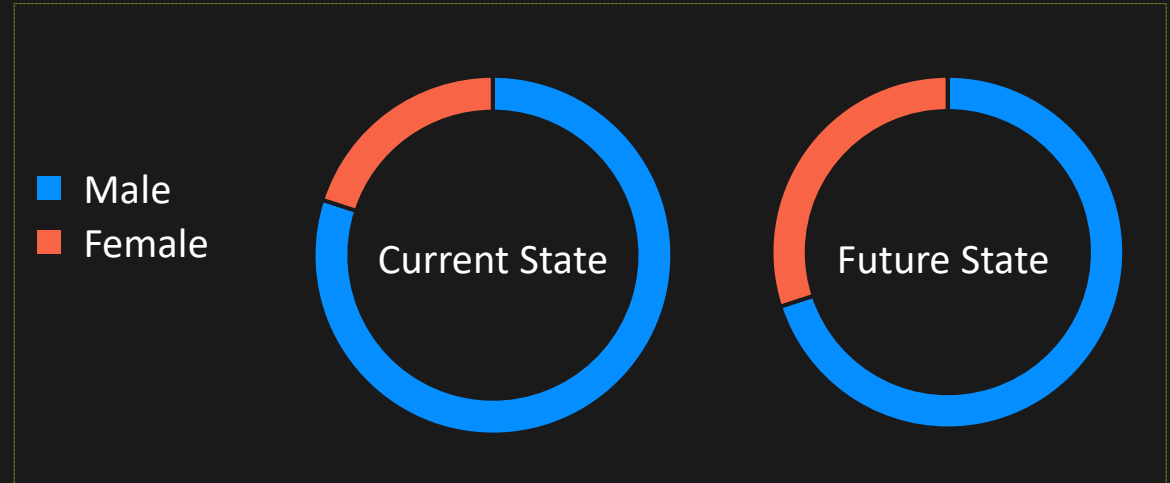
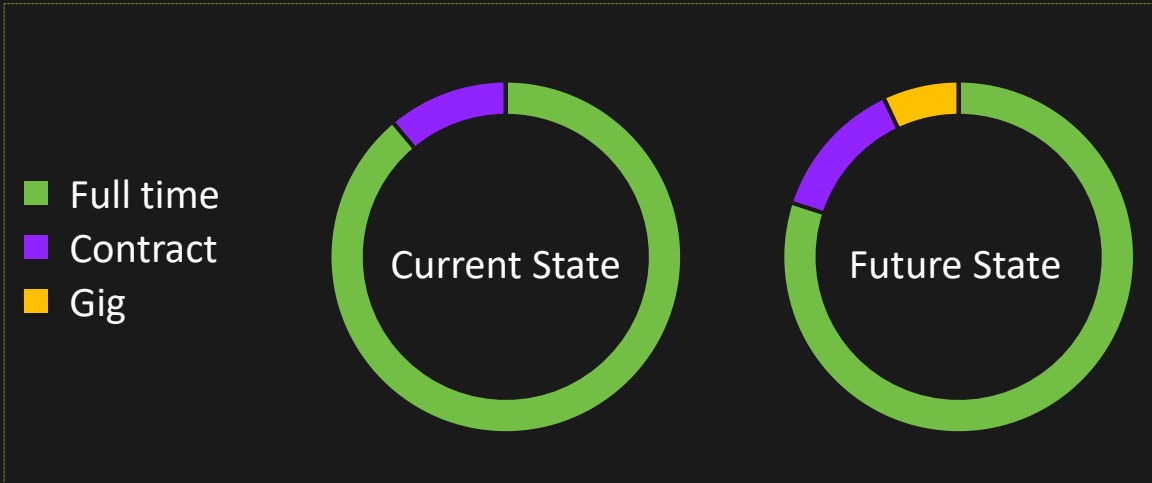
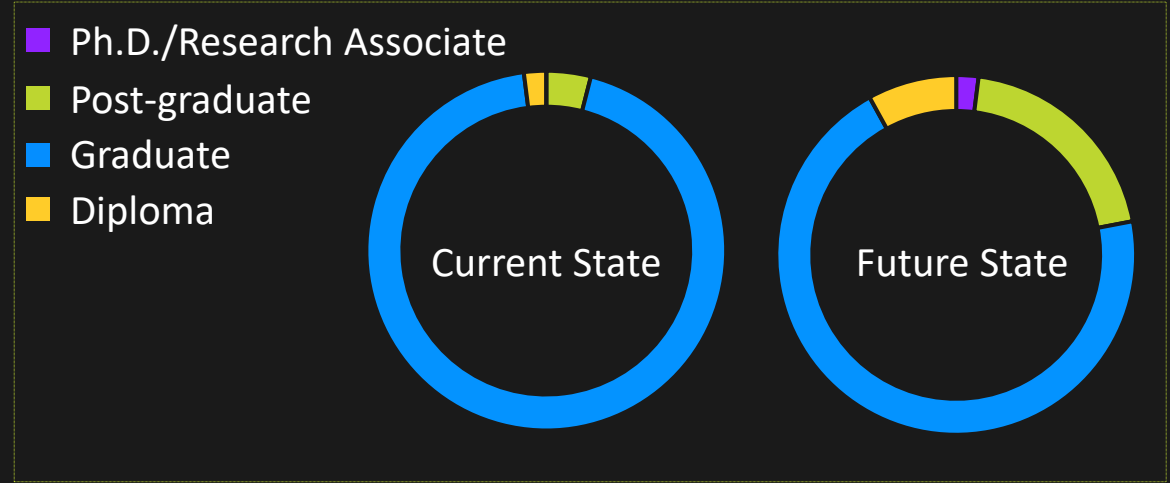
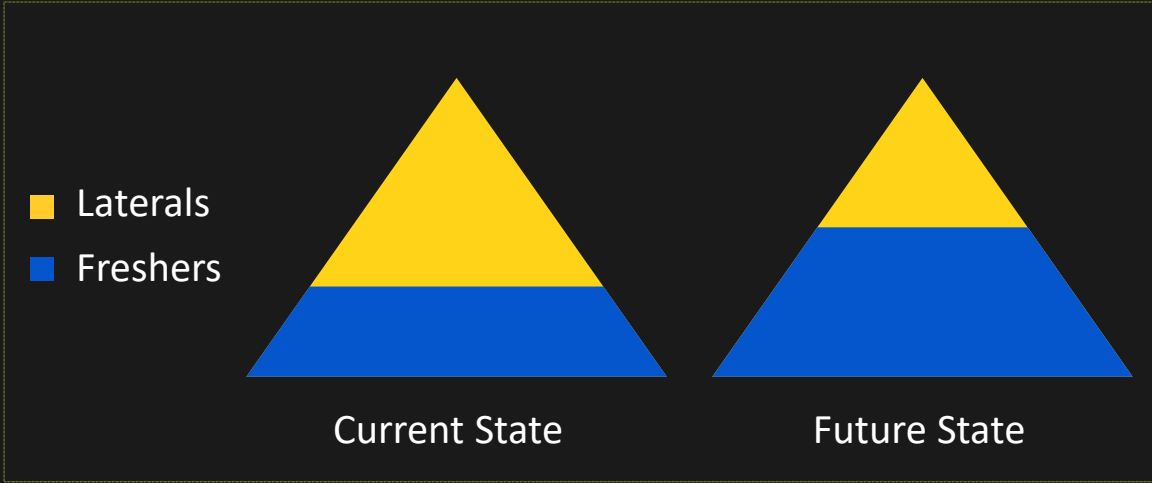
DELIVERY LED GROWTH



EVOLVING TALENT  
DEMOGRAPHICS

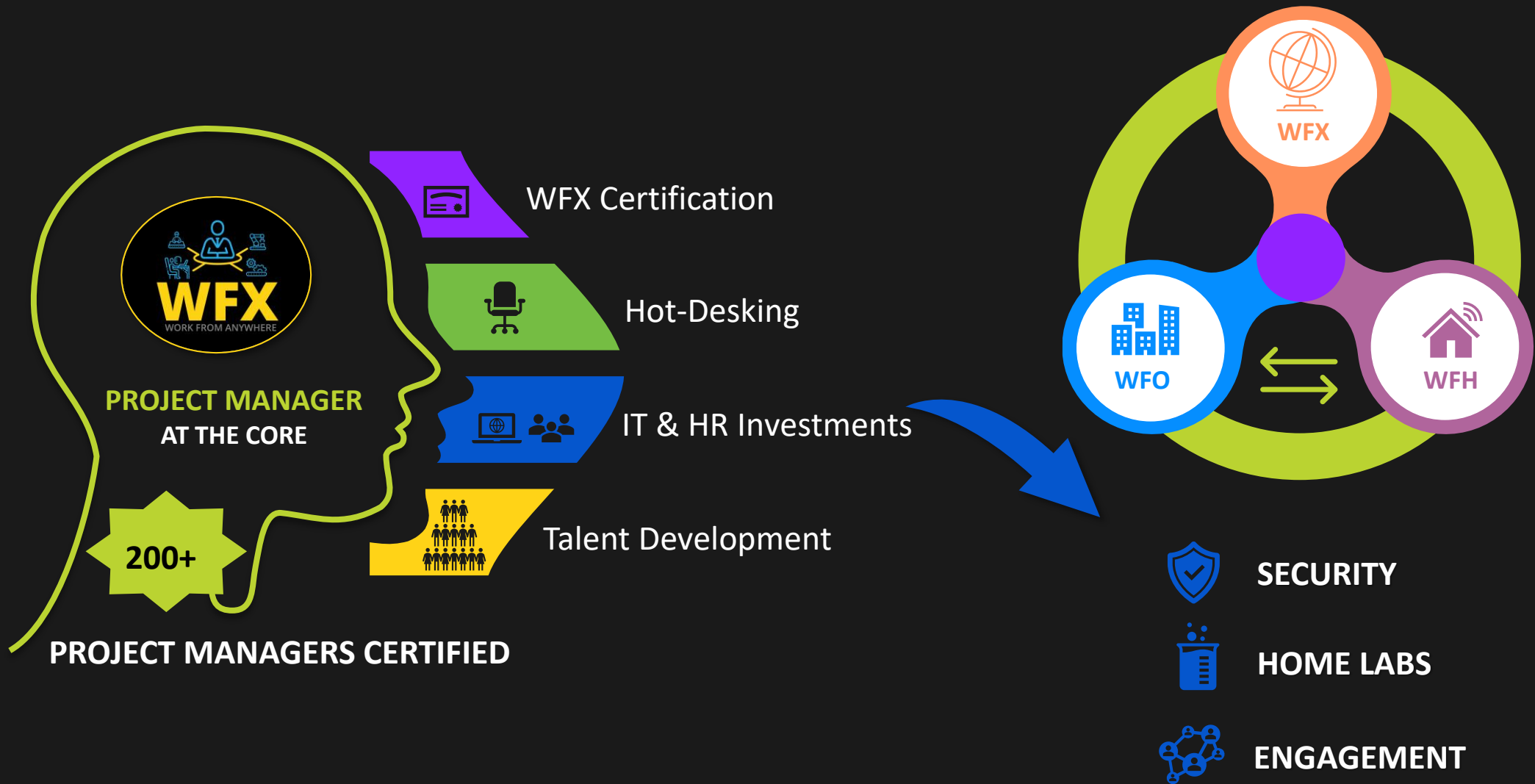


# WE ARE PREPARED FOR THE EVOLVING TALENT DEMOGRAPHICS ...



LTTS' HR Team recognized with the 2020 Stevie Award for "Human Resources Team of the Year: Talent Management (2020)"

# ... AS WE EMBRACE THE PARADIGM SHIFT @WFX



LTTS has been recognized for Best Workplace Practices by Financial Express at the BrandWagon Ace Awards 2020

## Global Engineering Academy (FY21 Highlights)



**200**

Certification Programs  
(Democratized Learning)



**1,500**

Graduate Trainees  
STEP-IN, GENESIS,  
GENESIS-PRO



**2,000**

Org-Wide Critical Skills  
Identified (Skill Matrix)



**70%**

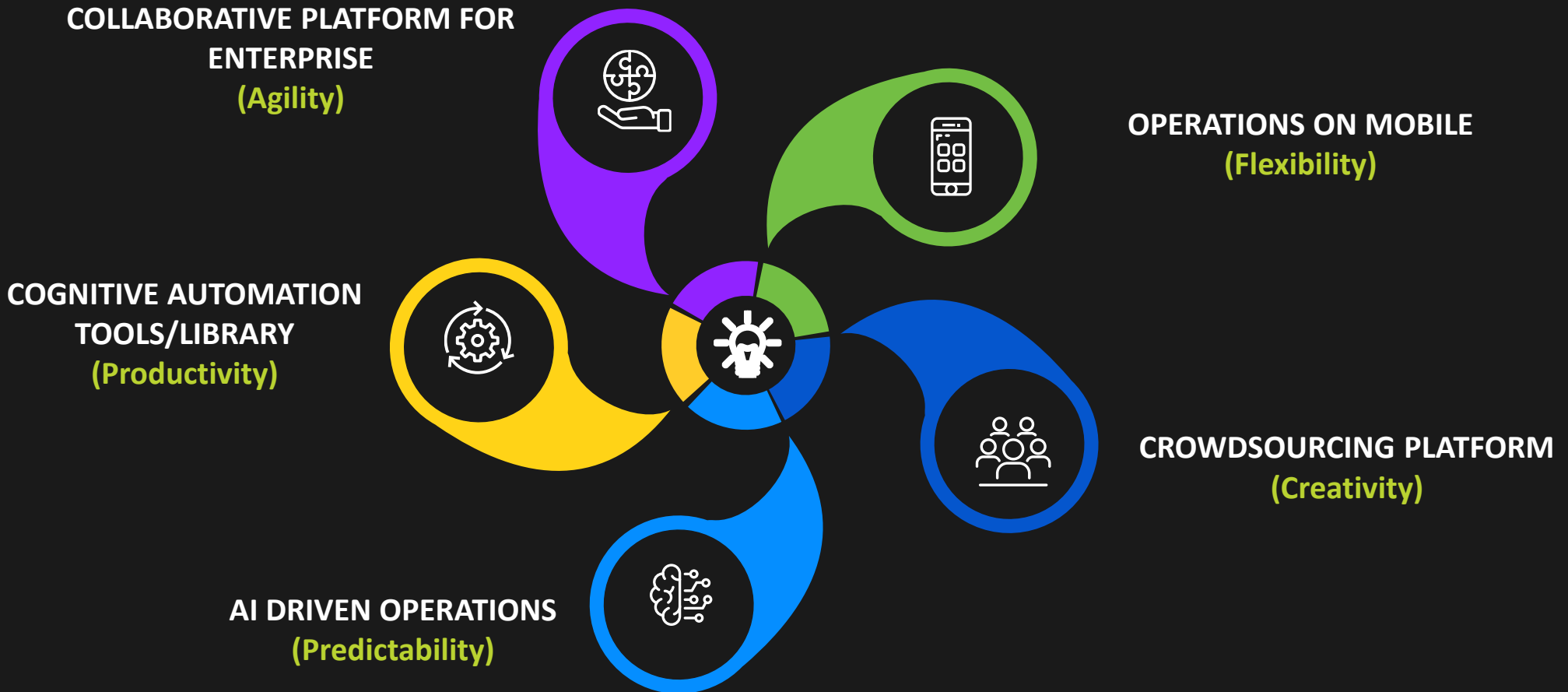
Laterals Upskilled  
STEP-UP

### Systems & Tools



## Road Ahead: Enabling Deeper Engagement



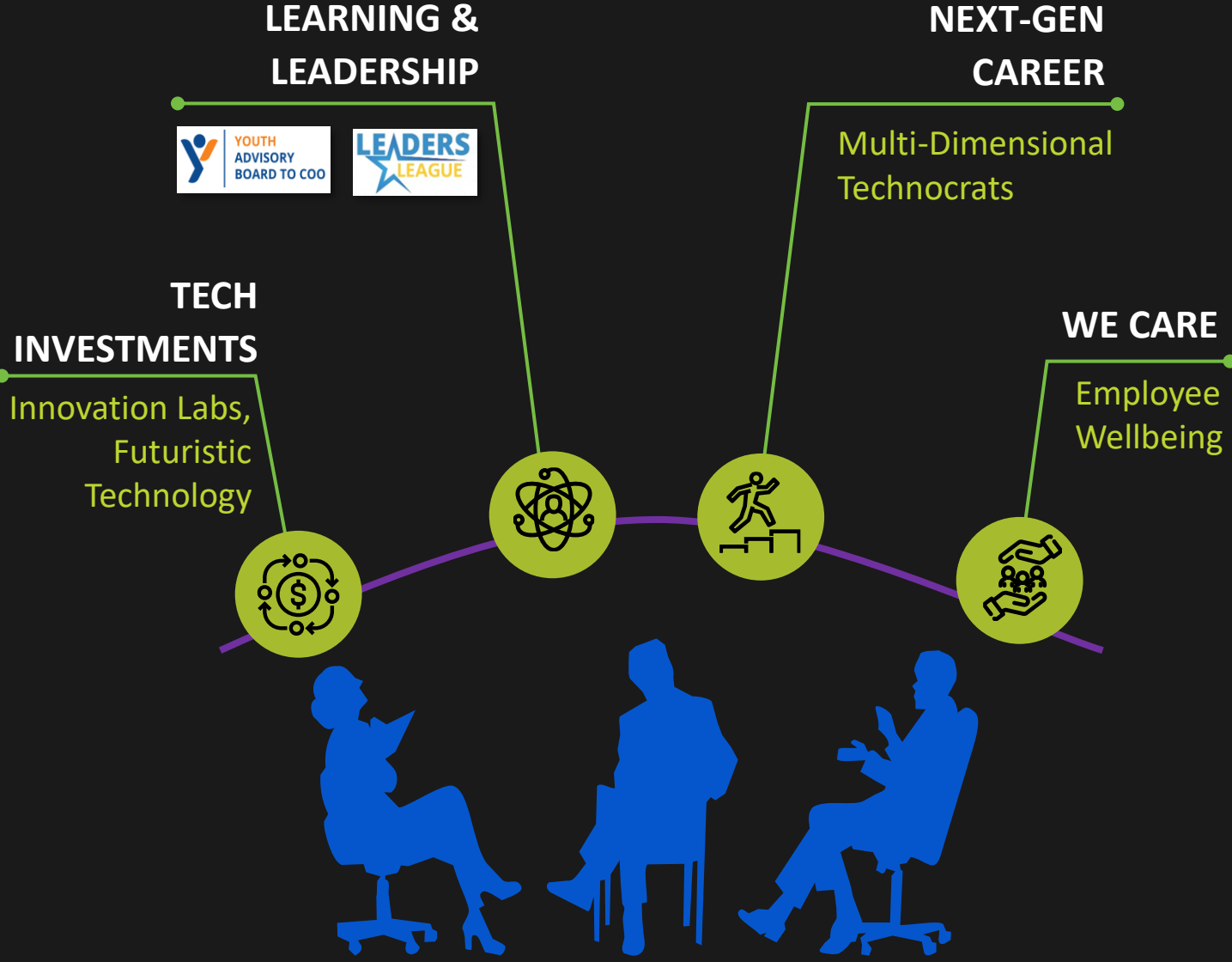
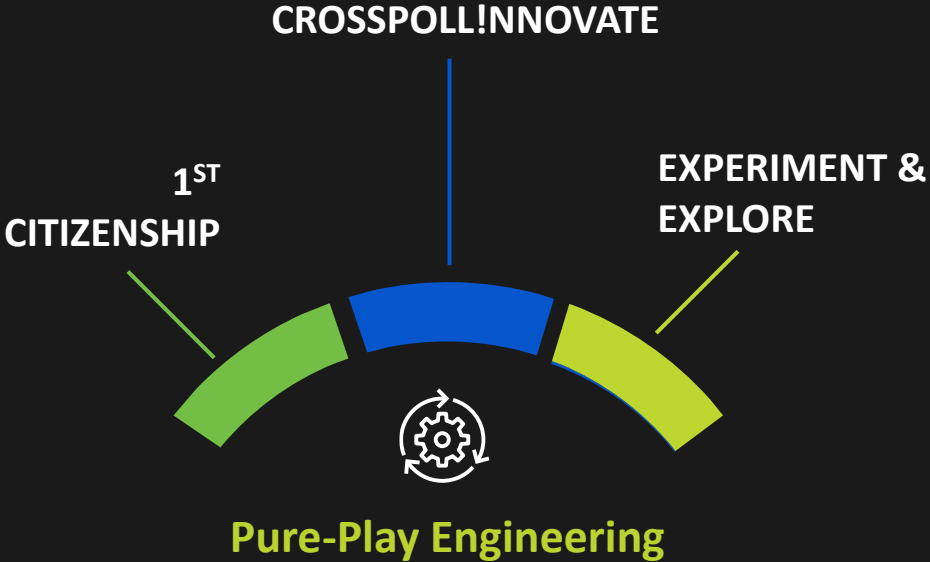


LTTS' AI-based framework AiKno® recognized with the annual IMC Digital Technology Awards, in the Smart-Tech Award 2021



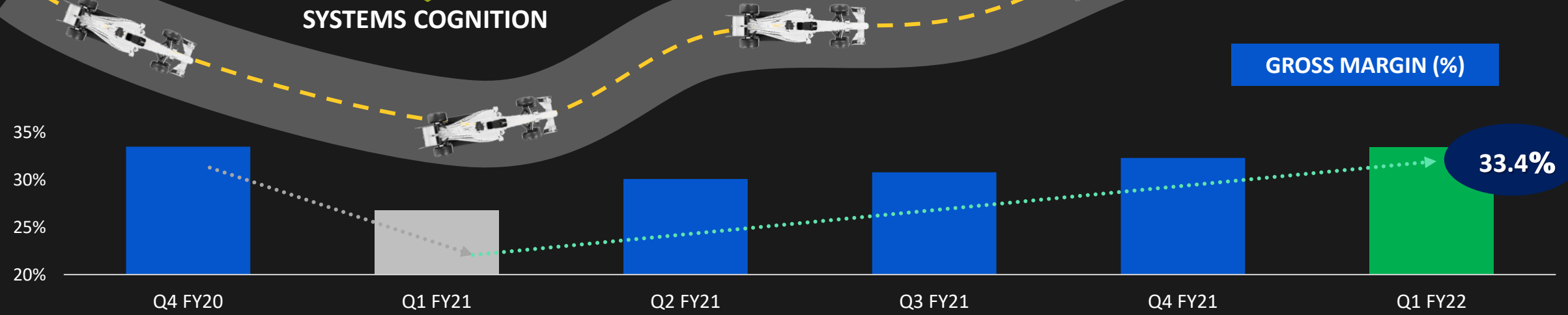
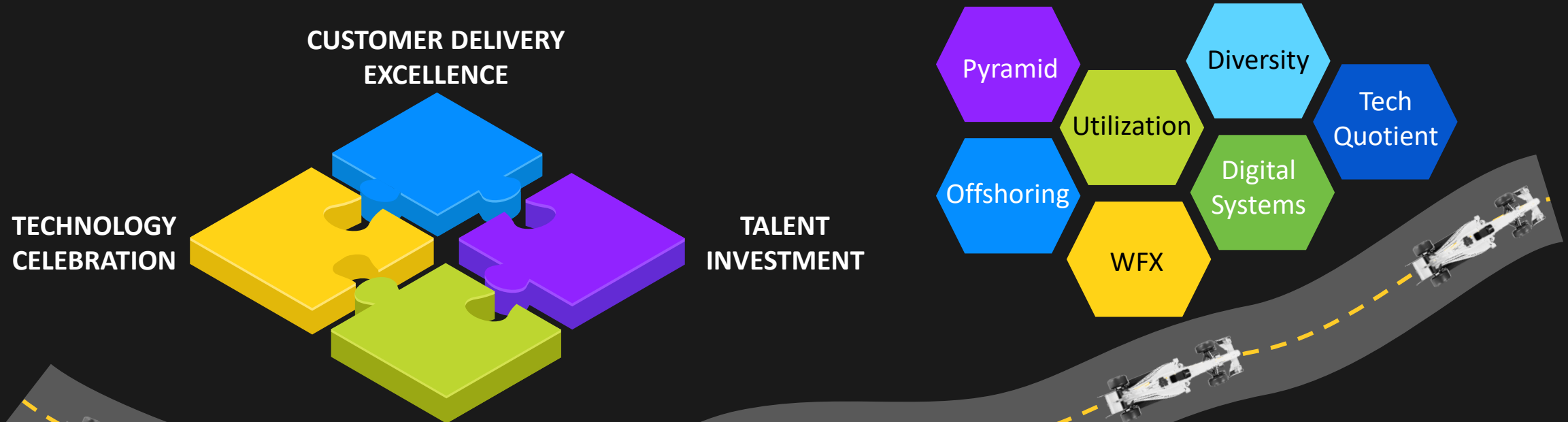
# SO, WHAT IS SPECIAL ABOUT WORK @LTTS?

**17,000** EMPLOYEES ENGINEERING THE CHANGE



NASSCOM honored LTTS with the Engineering and Innovation Excellence Awards 2021 in the 'Engineered-In-India Product of the Year' category for Robotic Endotrainer Kit

# OUR OPERATIONAL EXCELLENCE JOURNEY.....AS WE WIN IN THE TURNS



**THANK YOU**

# #EngineeringScale

## ELECTRIC AUTONOMOUS CONNECTED VEHICLES (EACV)

Shailendra Shrivastava

Global Delivery Head  
Transportation

Seema Ghanekar

Global Delivery Head  
Industrial Products

INVESTOR & ANALYST DAY (IAD) 2021

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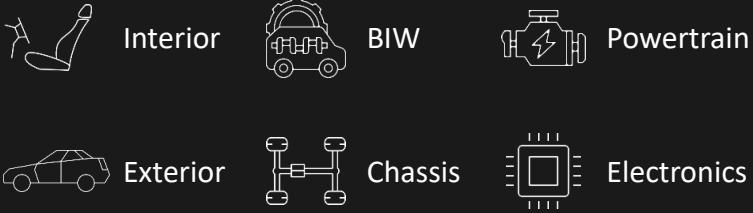
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# SOFTWARE DRIVEN CAR: FUTURE OF MOBILITY

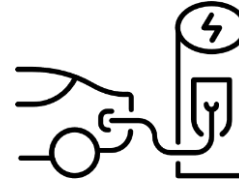
Focus on component development & integration  
OEM as the integrator working with Tier-1s



OEMs focusing at owning SW/ Stacks & influencing Semicons SoC designs



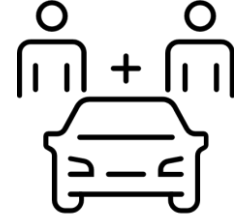
Autonomous



Electrification



Connected



Shared

# OUR STRATEGY & CREDENTIALS



## 01 Electrification

Market Size → **\$ 129 B** 2025

- End-end component capability
- Systems engineering
- Light weighting & Thermal management
- Energy management



## 02 Connected

Market Size → **\$ 32 B** 2025

- Integrated next-gen digital cockpit
- 5G & C-V2X
- Consumer device integration
- Connected car big data services



## 03 Autonomous

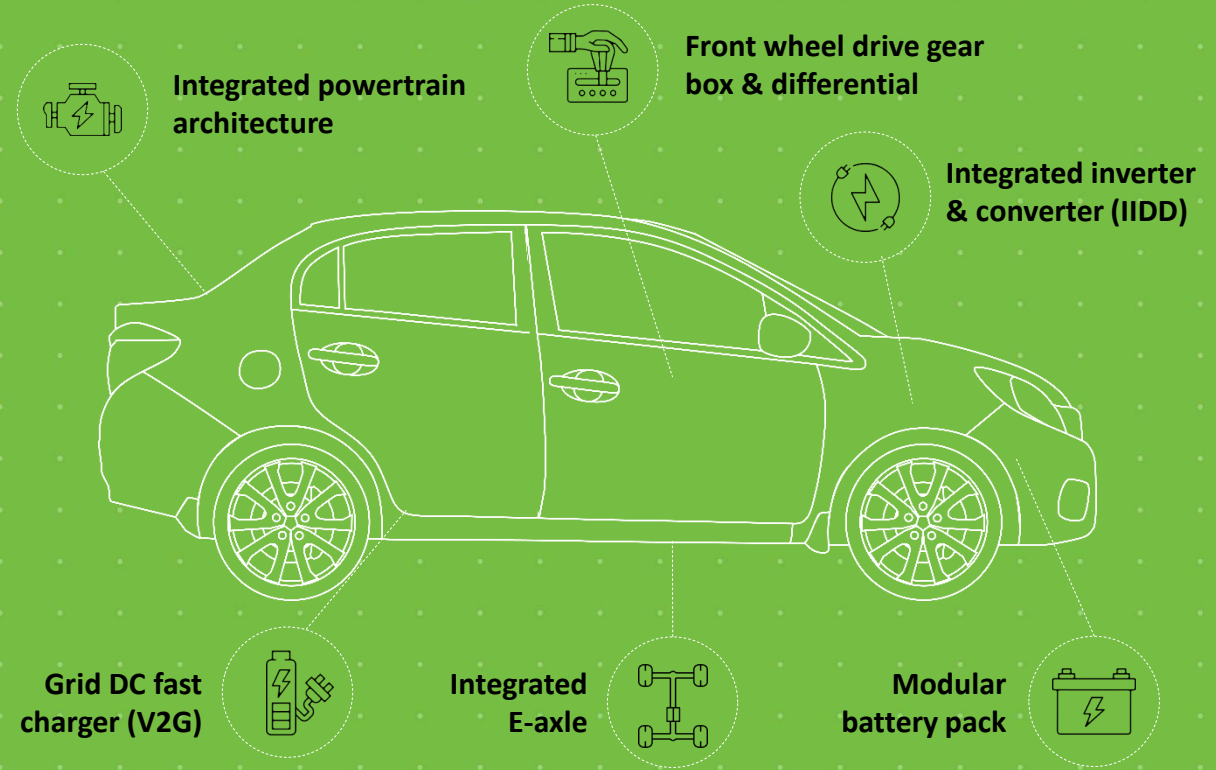
Market Size → **\$ 7 B** 2025

- AI/ ML driven perception & vehicle control
- Data management & annotation
- Sensor fusion and Data analytics

# OUR ELECTRIC VEHICLE PLATFORM JOURNEY

EV 1.0

eVOLTTS



40KM Range

BLDC Motor  
(60 Nm, 20 kW )

Industrial Grade EV  
Components

Reusable  
components

Rapid prototyping  
simulation suite  
design

DAB technology –  
Integrated power  
conversion

Integrated converter and motor  
control platform

Battery  
management controller



# INVESTING IN INNOVATION: STATE-OF-ART ELECTRIC VEHICLE TESTING LAB

## Components we test



e-Motors



E-Chargers



Inverters



Battery



DC-DC Converters

## Testing solutions we provide



Performance Testing



Functional Testing



Endurance Testing

# OFF-BOARD CHARGING INFRASTRUCTURE

## PV + Battery + EV Charging 50 kWh Setup in Vadodara



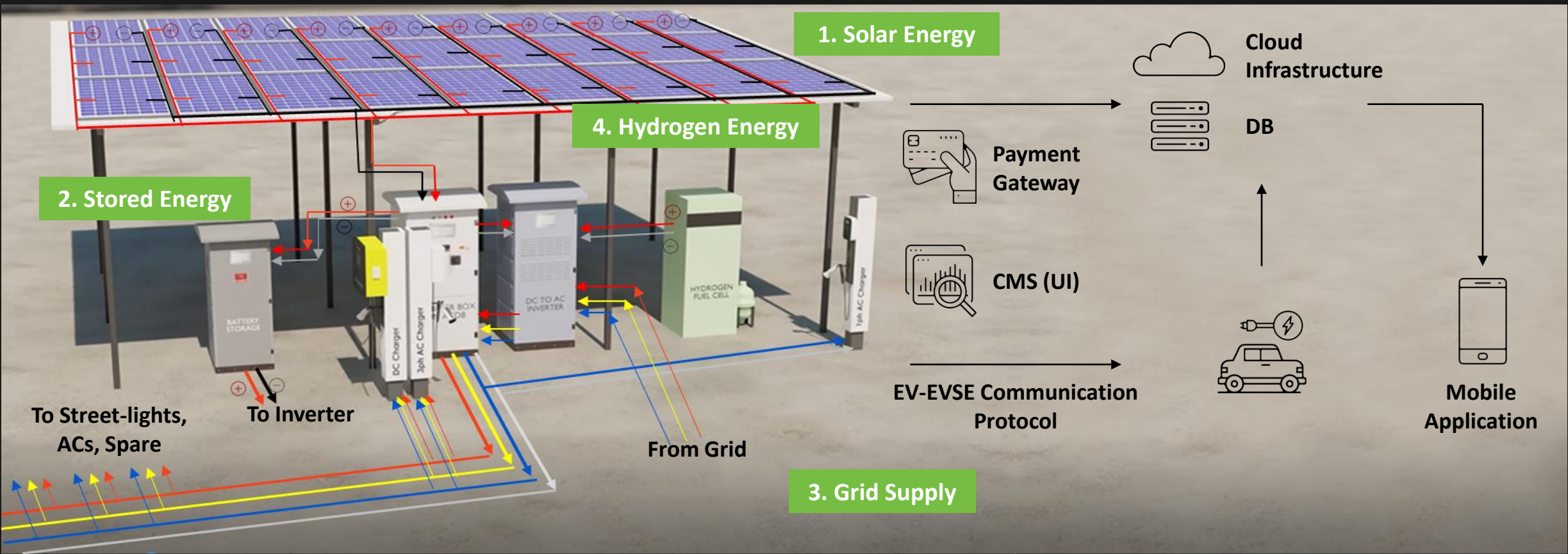
Multi-source energy input  
(Solar/Grid/Fuel cell)



Optimized hybrid  
energy controller



Fast  
charging

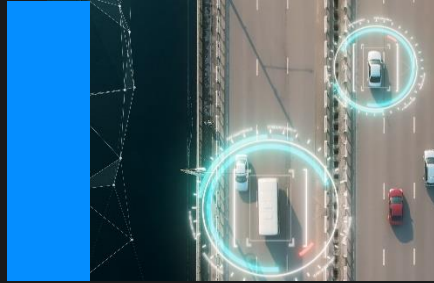


# CONNECTED & DIGITAL COCKPIT PLATFORM

## Key Drivers



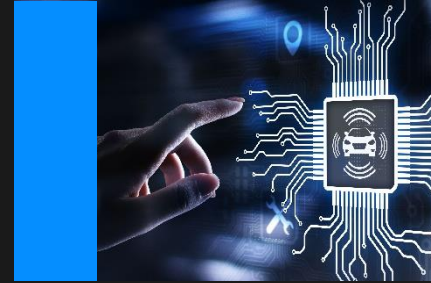
Advanced UI/ UX



Over the air



ADAS/AD



Integrated EV

5G enabled next gen digital cockpits with multiple displays

*Voicification* for driver and passenger interactions

Car applications to manage and monitor all functions

Cloud based data analytics and monetization

Connected car mobile apps

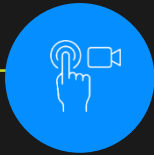
## Key features



Connected car



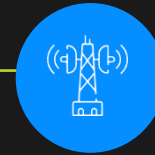
Patented Bluetooth multi-casting



Camera based gesture control



Alexa integration



5G/4G telematics



# AUTONOMOUS DRIVE PLATFORM



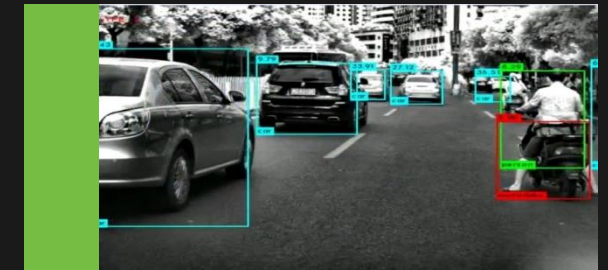
Traffic sign recognition



Unified framework for multiple ADAS applications



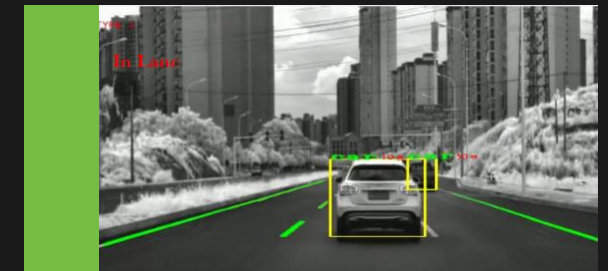
Mechatronics – Precise controls for mechanical components



Object detection & classification using monocular camera

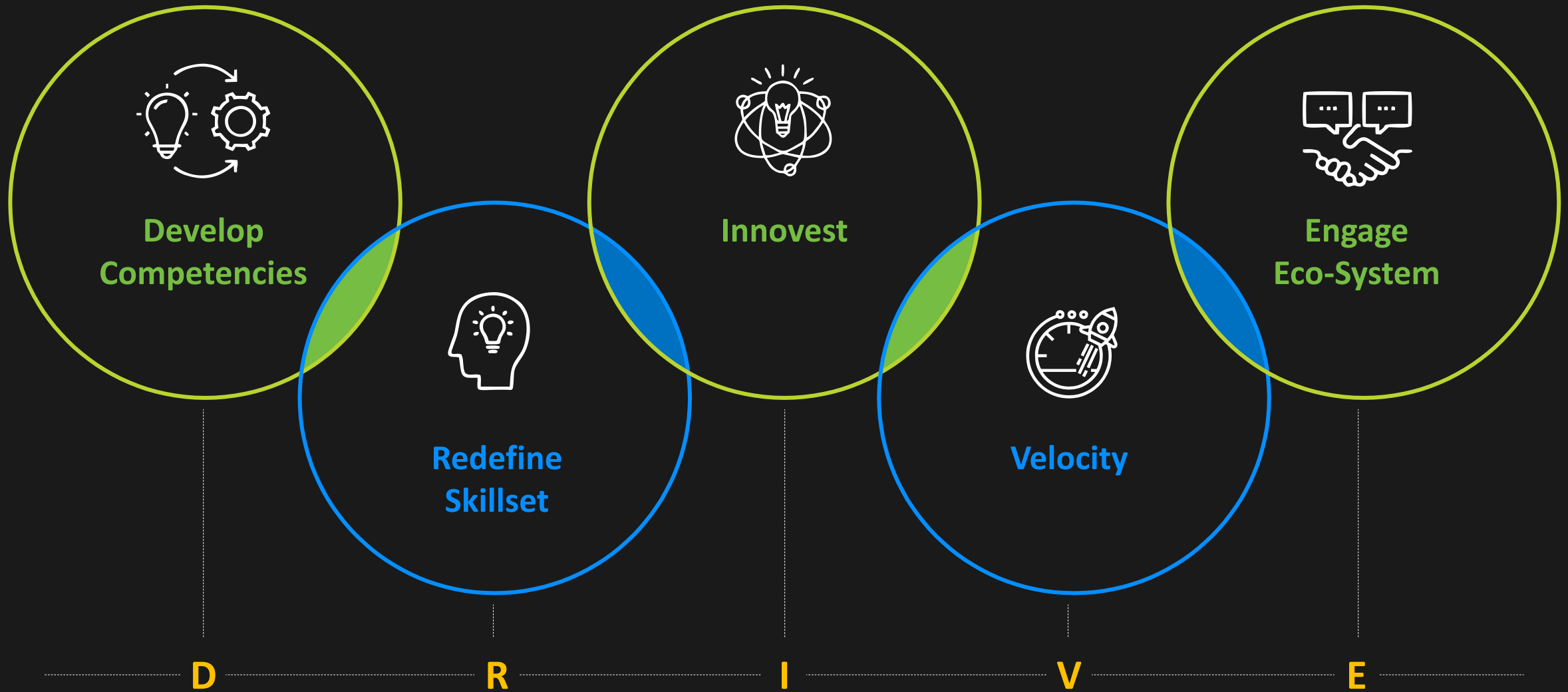


Driver monitoring systems



Automatic emergency braking

# THE DRIVE AHEAD






*L&T Technology Services*

**THANK YOU**

**#EngineeringScale**



**Digital Manufacturing Services**  
Roadmap and Investments

Prabhakar Shetty

Global Head  
Digital Manufacturing Services

INVESTOR & ANALYST DAY (IAD) 2021

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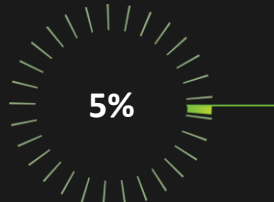
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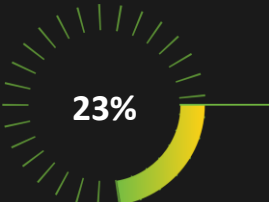


# DIGITAL MANUFACTURING TRANSFORMATION

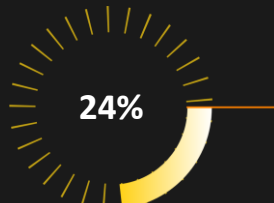
## Current State of Adoption



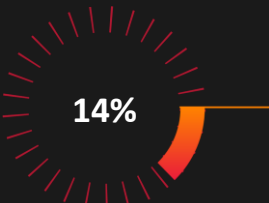
Scaled and mature I4.0 adoption across the enterprise



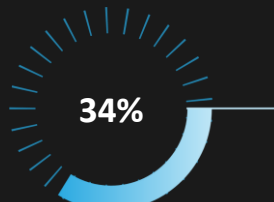
Early stages of adoption/ exploring the potential of I4.0



Implemented in parts of the organization (siloed operations)



Not thinking of adopting any Industry 4.0 initiative



Invested in pilot projects

- Everest Group Strategy Workshop on Industry 4.0, 2021



# DIGITAL MANUFACTURING TRANSFORMATION

## Market Opportunity

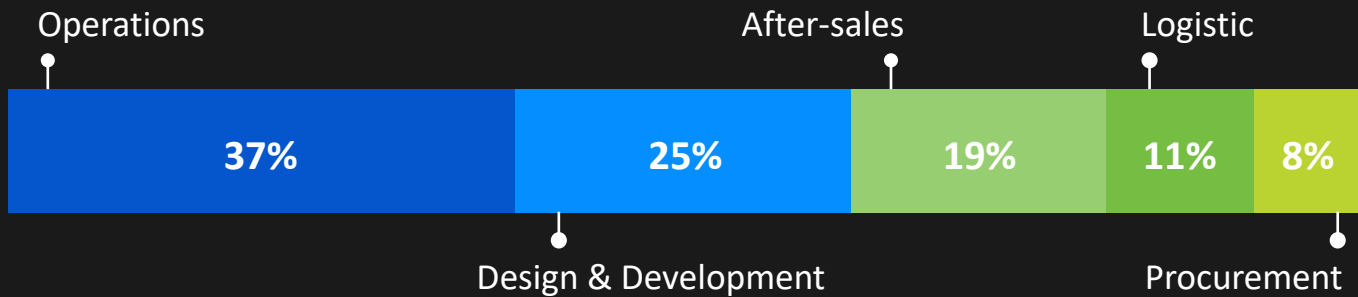
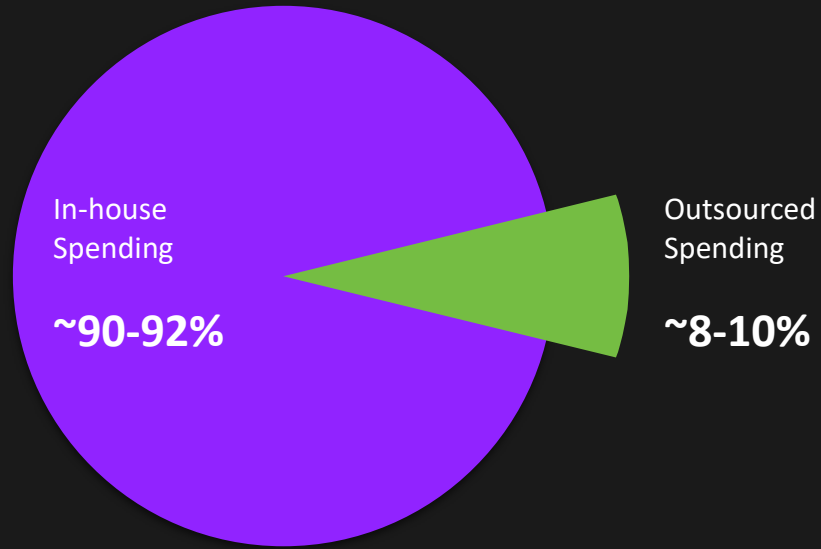
Global Business  
Industry 4.0 spend

**80-85**

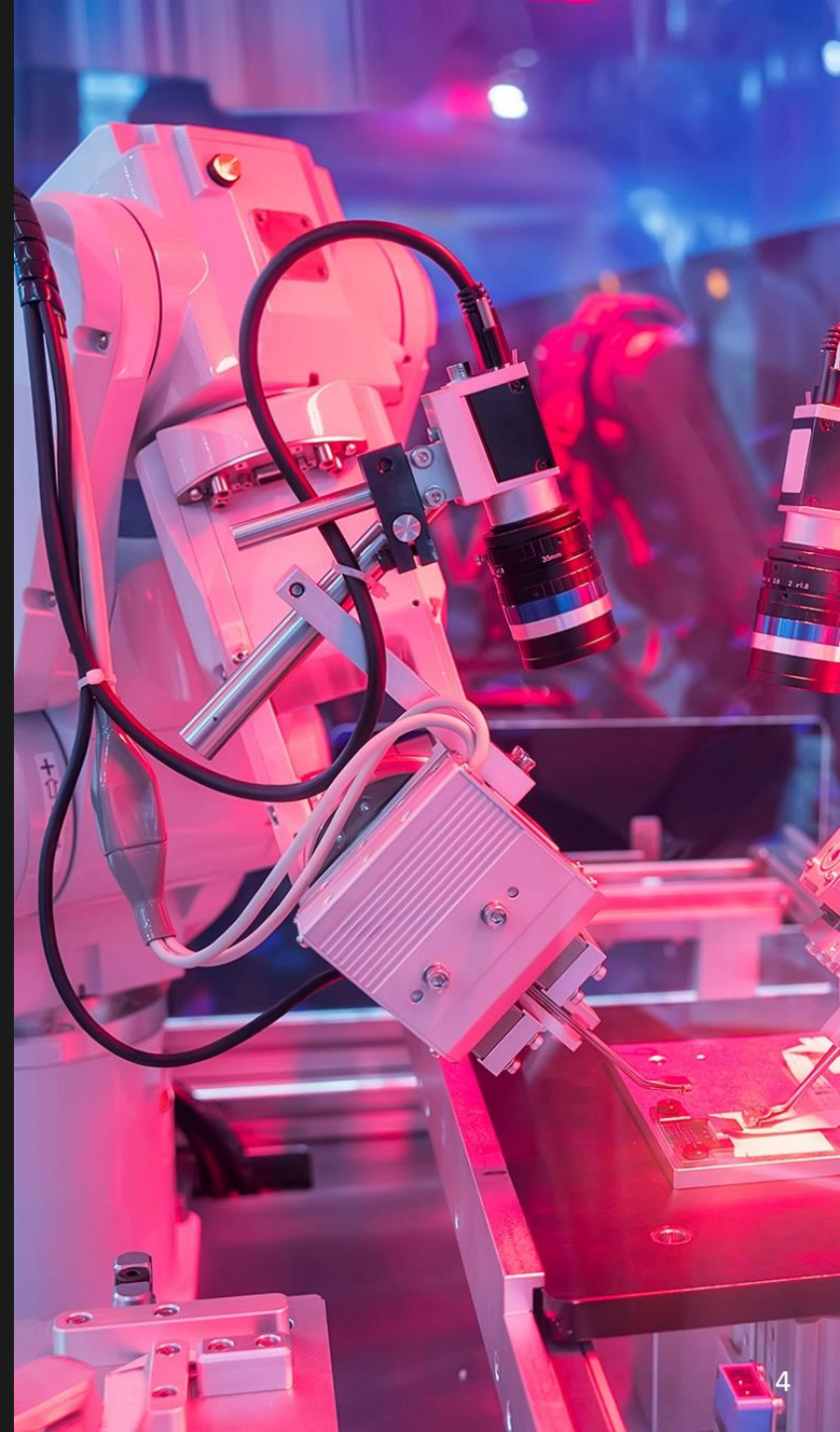
Billion USD, 2019

**15-16%**

Forecasted CAGR

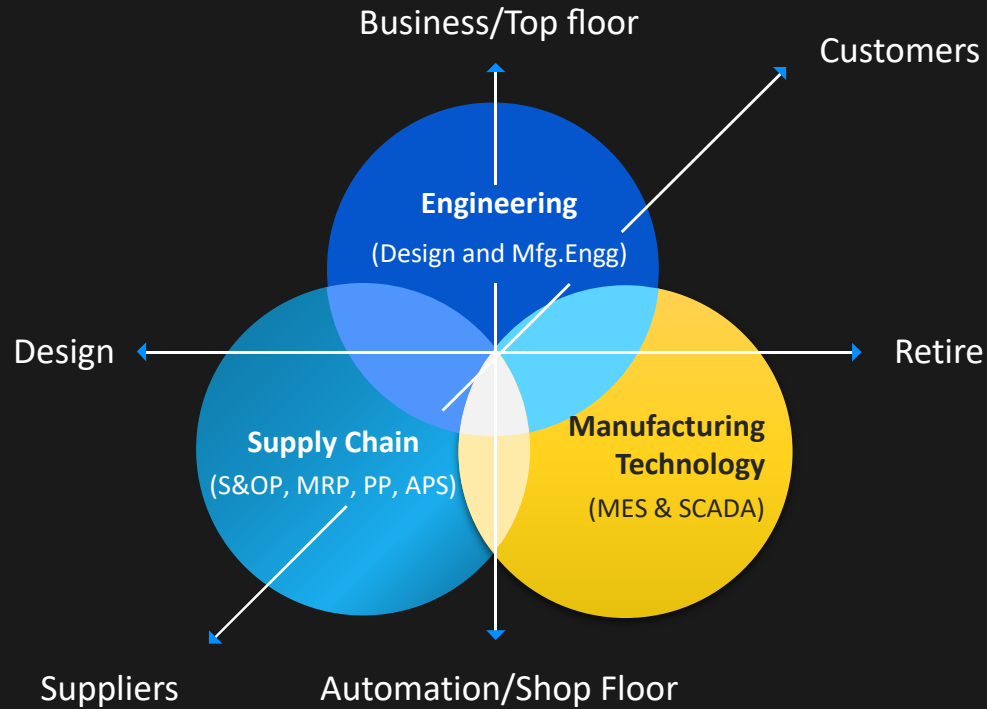


- Everest Group Strategy Workshop on Industry 4.0, 2021



# DIGITAL MANUFACTURING TRANSFORMATION

## Physical to Digital



## Enabling Technologies

IIoT

AR/VR

AI/ML

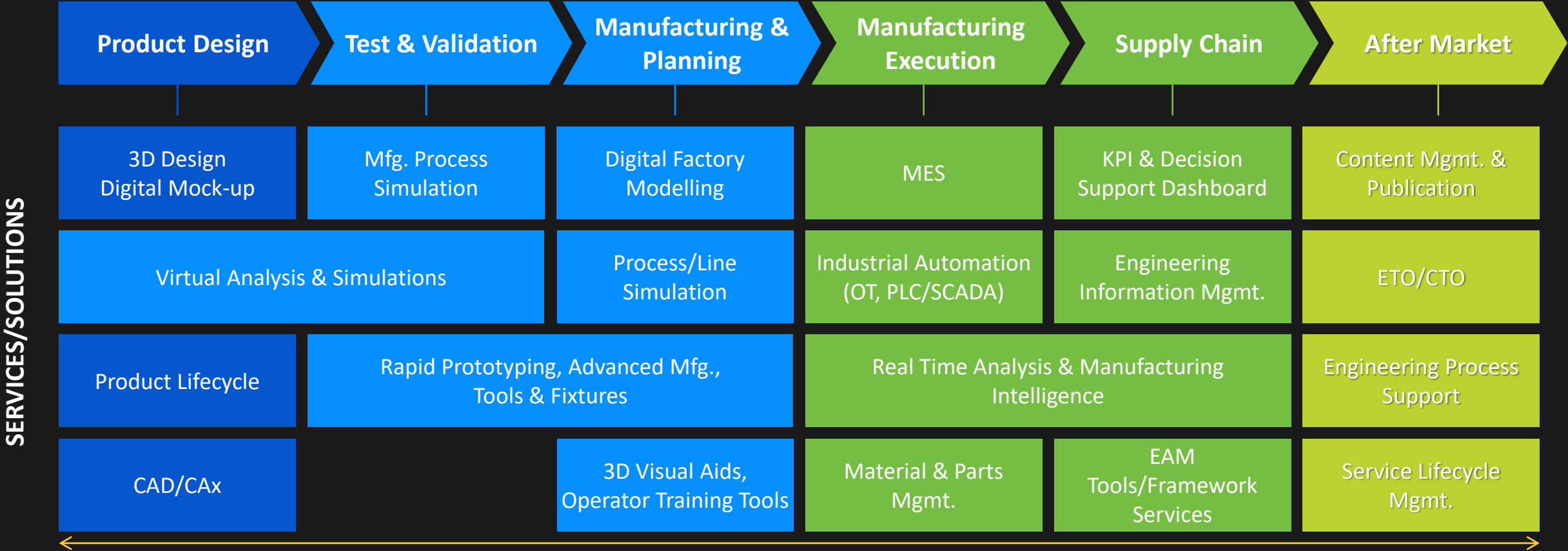
Digital  
Twins

Cloud/Edge  
Computing

Simulation



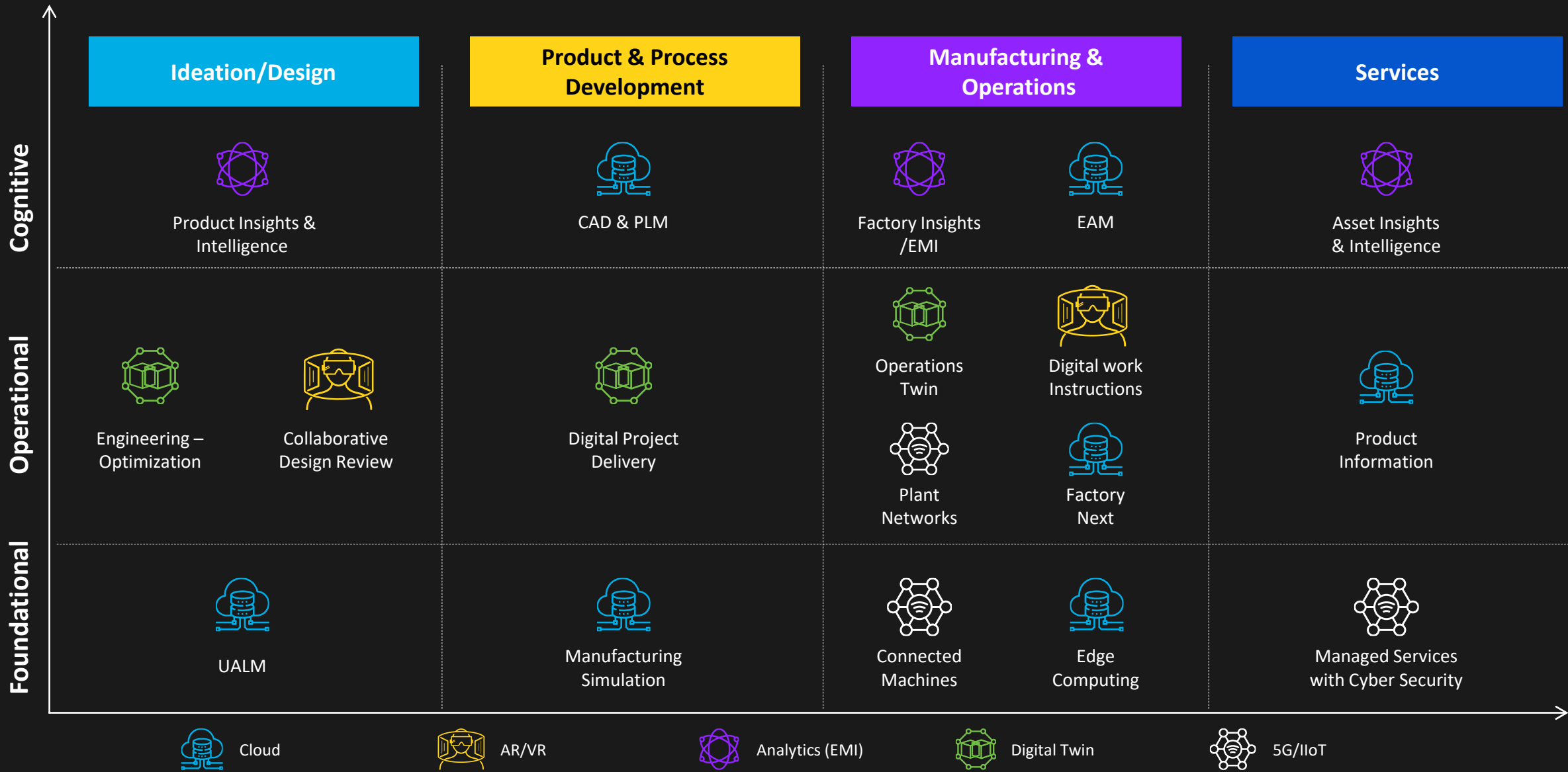
# SERVICING THE VALUE CHAIN



## DIGITAL TRANSFORMATION SERVICES (DTS)

- Product Lifecycle Management
- Enterprise Manufacturing Management
- Integrated Asset Management
- Integrated Content Management
- Engineering Process Services

# UNLOCKING VALUE USING NEW AGE TECHNOLOGIES

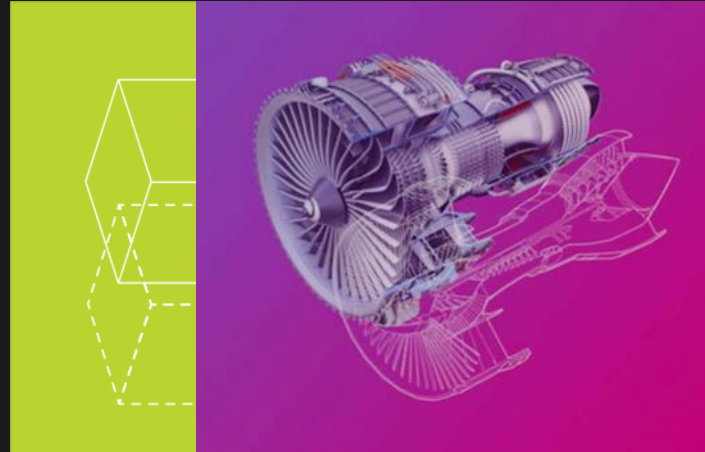


# OUR FOCUS...



## 01 Engineering Applications Cloud

- Design Cloud
- Manufacturing Cloud
- Services Cloud
- FactoryNext Framework



## 02 Digital Twin

Contextual Digital Twin:  
Engineering, operation and performance:

- Design Twin
- Operations Twin
- Service Twin



## 03 IIoT Based Enterprise Mfg. Intelligence (EMI)

Design, factory & asset insights

- Manufacturing Service Bus
- Predictive
- Prescriptive

# READY SOLUTIONS: ACCELERATE INDUSTRY 4.0 ADOPTION

## Product Lifecycle

DFx - Design For Excellence

iConfigure

uALM (Unified Application Lifecycle Management)

Labelling Management

## Asset Reliability

### Asset Reliability Center

Asset Data Advisory (ADA)

Condition Based Maintenance (CBM)

Maintenance, Reliability And Integrity (MRI)

Spare Parts Management & Governance (SMG)

Overall Equipment Effectiveness (OEE)

Asset Condition Monitoring (ACM)

## Manufacturing Operations & Services

Paperless Operations

Energy & Sustainability Manager

Golden Batch/ Batch Manager

Digi-serve

Product Catalogue & Data Management

Digital Twin

# DELIVERING VALUE

01



**Cloud Based  
Paperless Factory  
for CPG Major**

02



**Plant Asset Management  
Platform for an  
Automotive Giant**

03



**Digital Twin for  
Industrial Products  
Manufacturer**

04



**Energy and  
Sustainability Manager  
for F&B Major**



**THANK YOU**

# #EngineeringScale

 **DIGICAL** is here!

Products = AI + Digital + Physical 

Nitin Jain

Global Head  
Digital Products & Services

INVESTOR & ANALYST DAY (IAD) 2021

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# THE MULTIPLE DIMENSIONS OF DIGICAL



## 01 Connected



Alexa, dim the light  
and while you are at it, play  
Heal The World

## 02 Collaborative



Let me set the mood!  
Play Heal The World and dim  
the light to soothing blue!

## 03 Intuitive

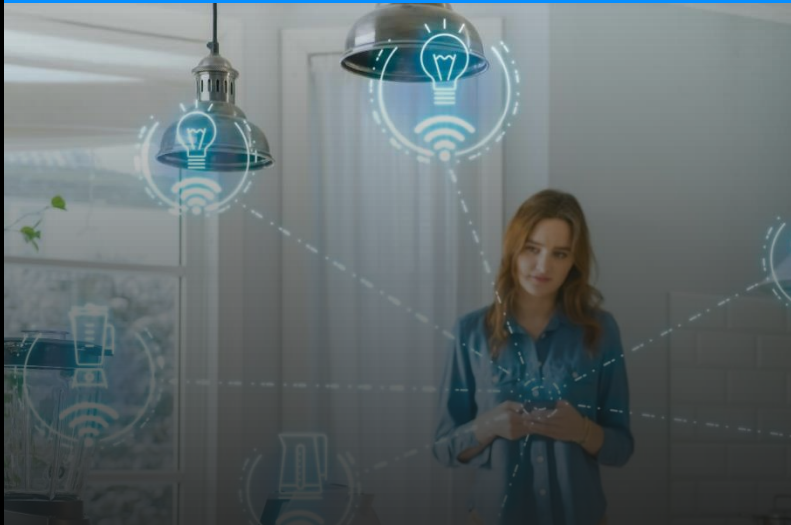


Today is karaoke night!  
I will set the temp to 23° C, heat popcorn  
and do a mike test!

# WHAT DOES THIS MEAN IN TERMS OF DIGITAL ENGINEERING SPEND?



## 01 Connected



- Edge Connectivity
- Cloud Optimization
- Secure Connections
- Embedded AI
- Integrated CX



## 02 Collaborative



- Embedded DevOps
- High Performance Cloud
- Digital Identities
- Explainable AI
- Touchless Interfaces



## 03 Intuitive



- Smart IoT
- Multi Cloud
- AIDevSecOps
- General AI
- Holographic Interfaces



# DIGITAL ACROSS INDUSTRIES

## 01 Connected

## 02 Collaborative

## 03 Intuitive

### Industrial

- Connected IoT

- Digital Twin

- Self-healing machines

### Transportation

- Connected Vehicles (V2C)

- Autonomous Level 5

- V2V, V2I, V2P (Vehicle to Vehicle, Infra, Pedestrians)

### Healthcare

- Connected Hospitals & Medical Devices

- Autonomous Surgical Robots

- Integrated 360° Personalized Healthcare

### Hi-Tech

- 5G Edge Multi-Access

- Real-Time Network Orchestration

- Automated Network Provisioning & Roll-Outs

### Plant Engineering

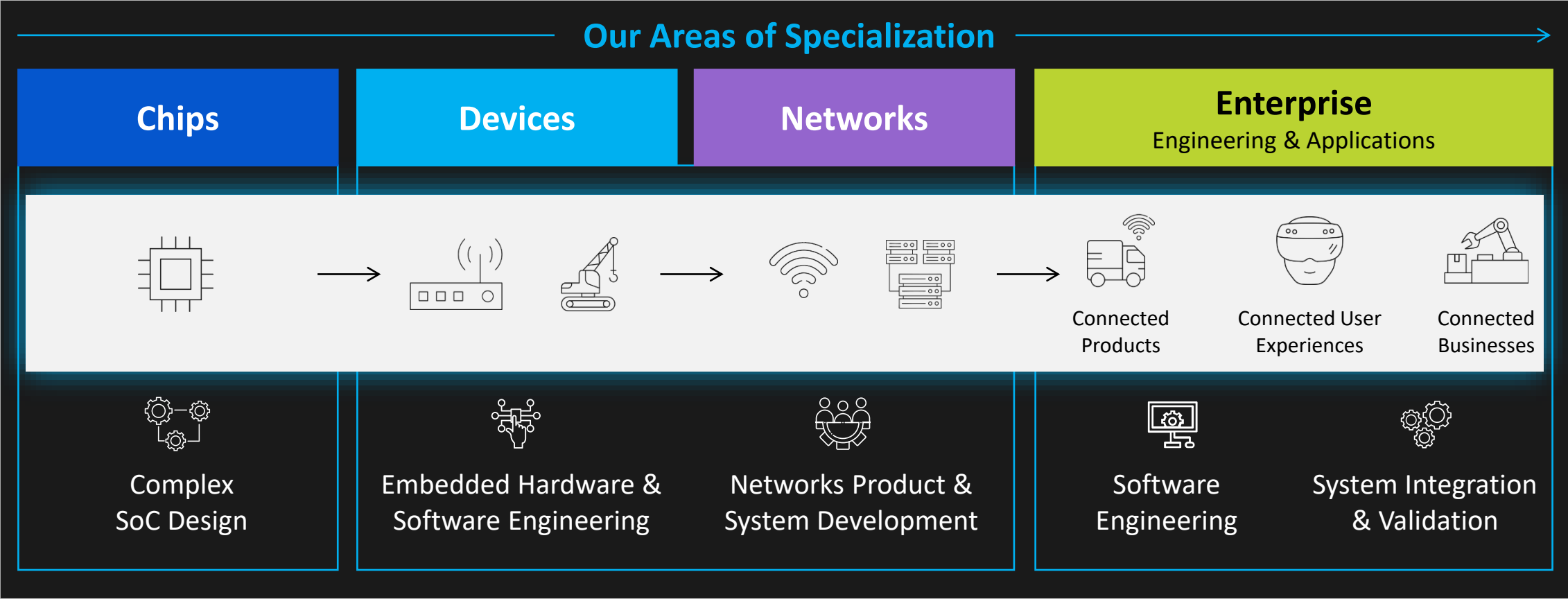
- Connected Shop Floor

- Collaborative Manufacturing

- Intuitive Shop Floors that Self-Plan, Forecast & Manufacture

This work requires **CHIP TO CLOUD & BACK** expertise!

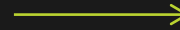
# ENGINEERING DIGITAL - CHIP TO CLOUD & BACK



**Connected**



**Collaborative**



**Intuitive**

# OUR MASTERY OF THE 4E'S HELPS ENABLE DIGICAL

## Complex Engineering

Chip, Devices, Edge, Cloud, Users, Ecosystems and Everything In Between



**25%**

Productivity Gains for Utilities Provider

## Digital Engineering

Strong capabilities in Digital Technologies



**30%**

Efficiency gains through IoT Platform for Smart Dispenser Monitoring

## Design Engineering

Proven expertise in designing world class products



**World's 1<sup>st</sup>**

Surgical Training Robot - Each manipulator has 7 DoF with camera arm

## Business Engineering

Deep understanding of business & specific industry domain - right context









**40%**

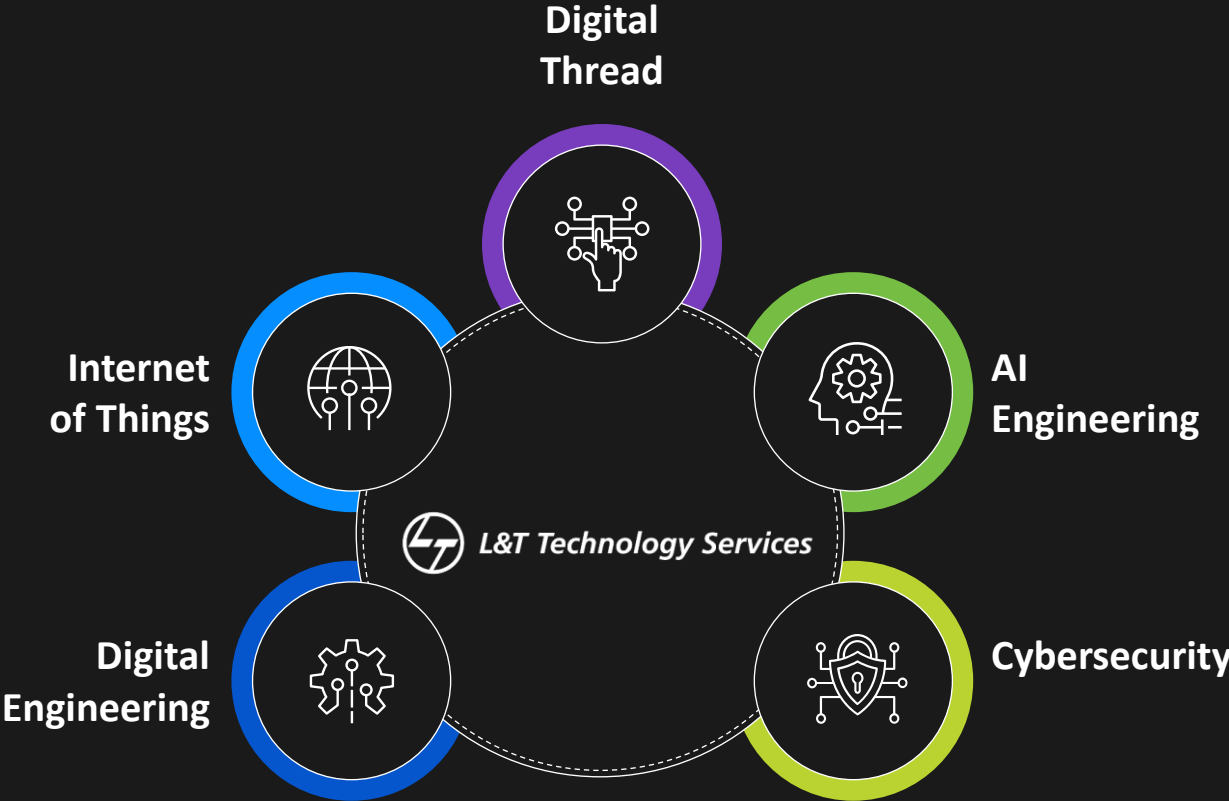
Reduced effort for aerospace major thru AI-enabled meta data extraction



# 238 FRAMEWORKS - ACROSS SEGMENTS

		NOW			UPCOMING	
	<b>Transportation</b> <b>38+</b>	Connected Transport	Autonomous Driving		Smart Electric Vehicle	Mobility As A Service
	<b>Medical &amp; Lifesciences</b> <b>22+</b>	3D Printing	Remote Patient Monitoring		AI in Medical Imaging	Digital Telemedicine
	<b>Industrial Products</b> <b>23+</b>	Energy Storage	Digital Twin		Prescriptive Maintenance	Microgrids
	<b>Plant Engineering</b> <b>32+</b>	Energy Management	Asset Performance	Worker Safety	Plant Lifecycle Management	
	<b>Consumer Electronics, Media &amp; Entertainment</b> <b>28+</b>	OTT Apps	Advertising	Digital Signage	OTT CMS	Connected Meeting Rooms
	<b>Hi-Tech, Technology, Telecom &amp; Others</b> <b>80+</b>	Proprietary Analytics	Application Lifecycle Management	AR Based Service Transformation	Multi-Edge access	5G Based Employee Safety

# RATED AS A LEADER ACROSS NEXT-GEN TECHNOLOGIES



THANK YOU

**THANK YOU**

# #EngineeringScale



Accelerating Growth and  
Building Resilience

Rajeev Gupta  
Chief Financial Officer

INVESTOR & ANALYST DAY (IAD) 2021

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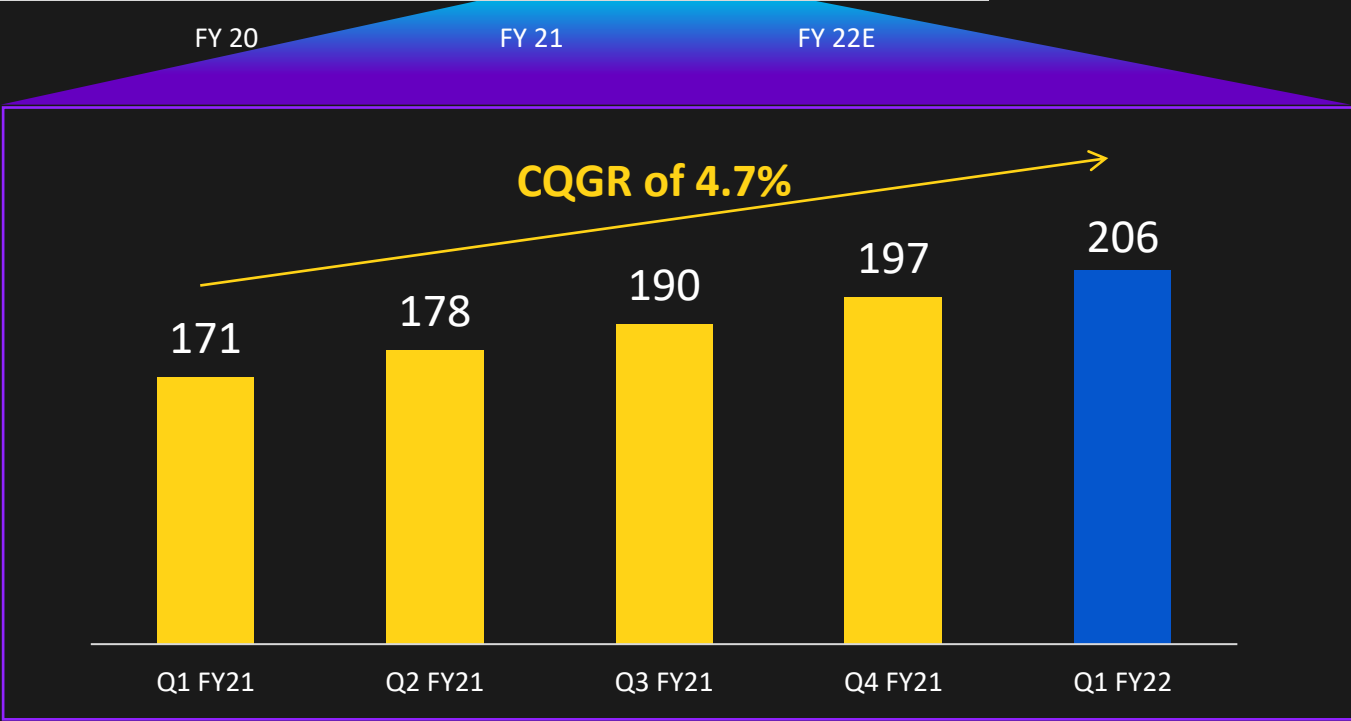
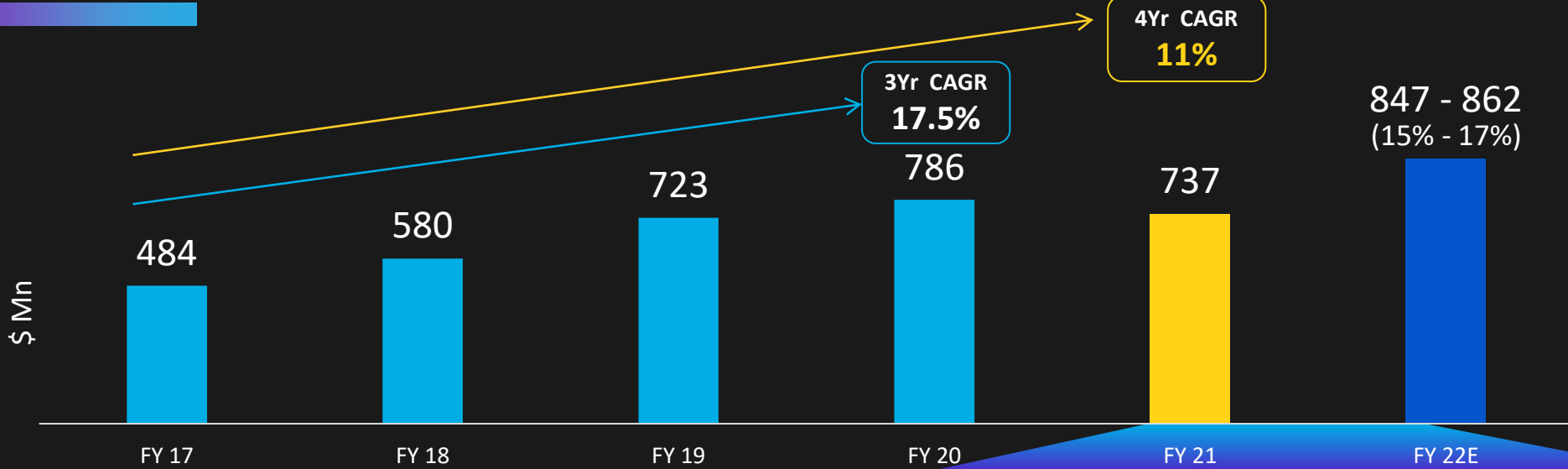
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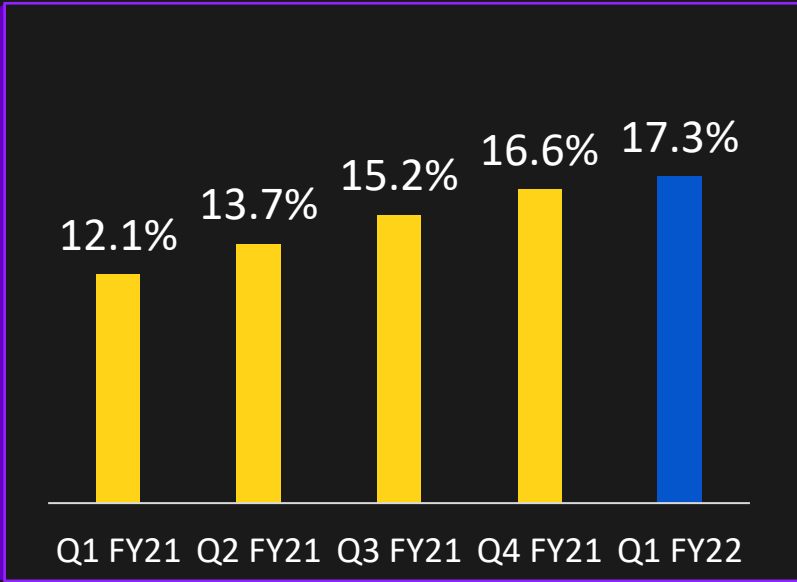
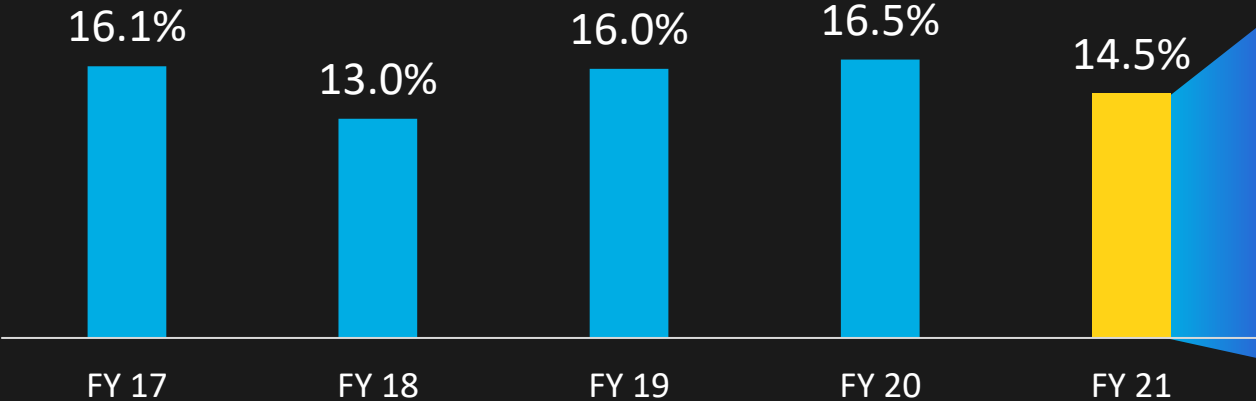
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# REVENUE PERFORMANCE

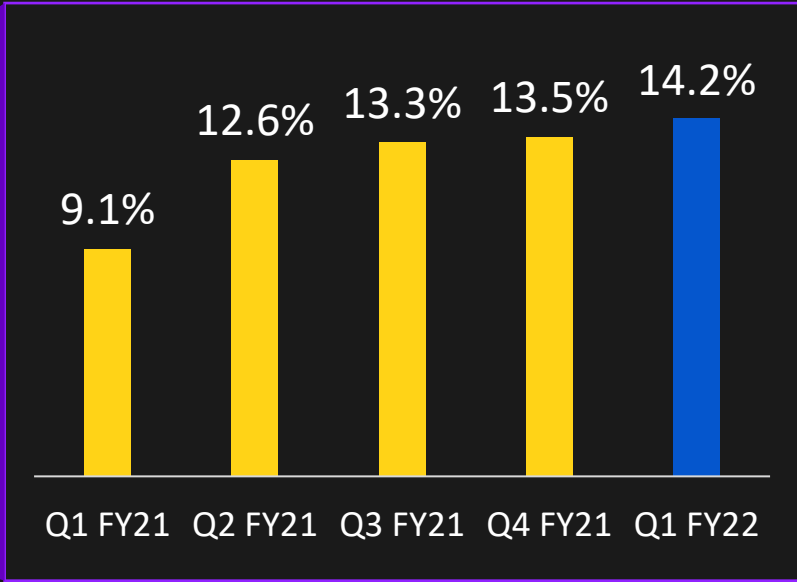
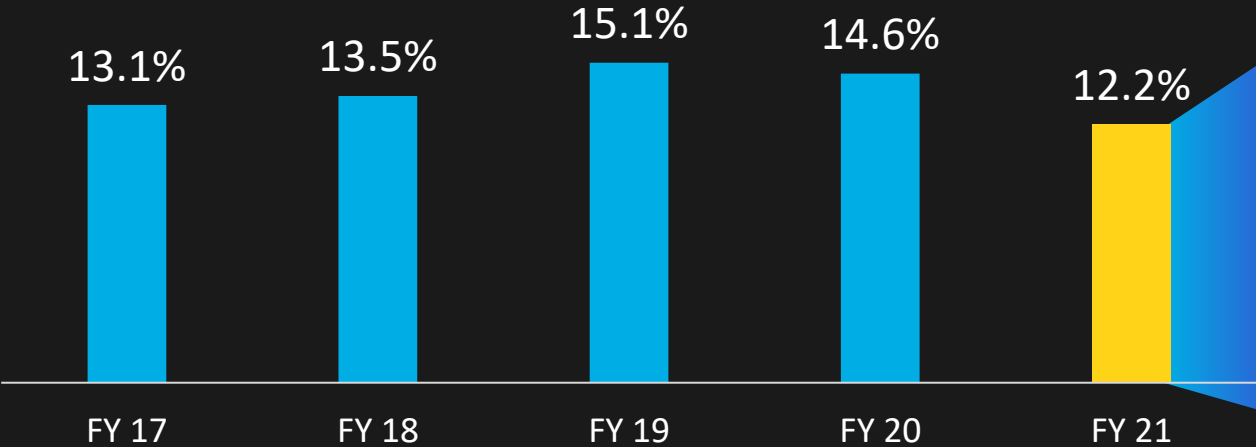


# OPERATIONAL PERFORMANCE

## EBIT margin



## PAT margin



# 4-PRONGED STRATEGY



## 01 Growth

- Broad based growth & Diversified exposure
- Focused Investments to drive growth in Digital Engineering



## 02 Profitability

- Segmental Margin consistency
- Cost efficiencies
- Cash flows



## 03 Governance

- Strategic M&A
- Finance Transformation
- ESG

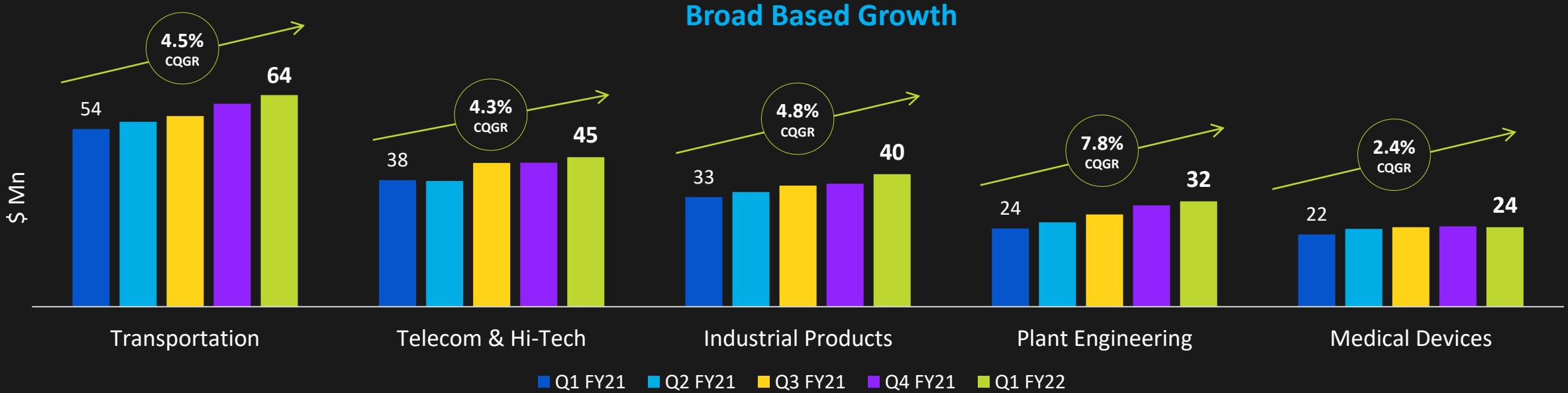


## 04 Shareholder Returns

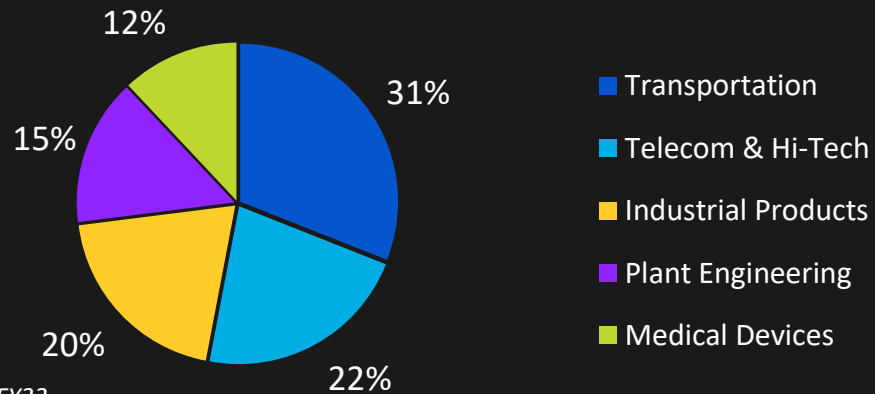
- Consistent Dividend distribution
- ROE focus



# GROWTH

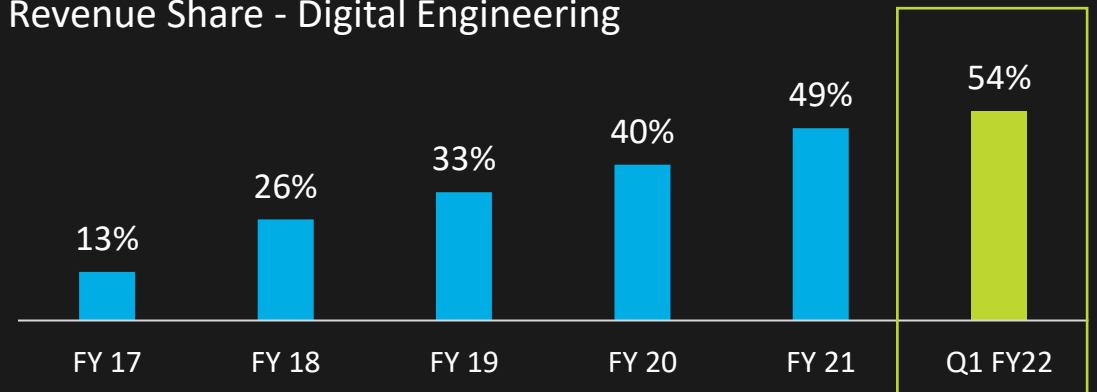


### Diversified Revenue mix



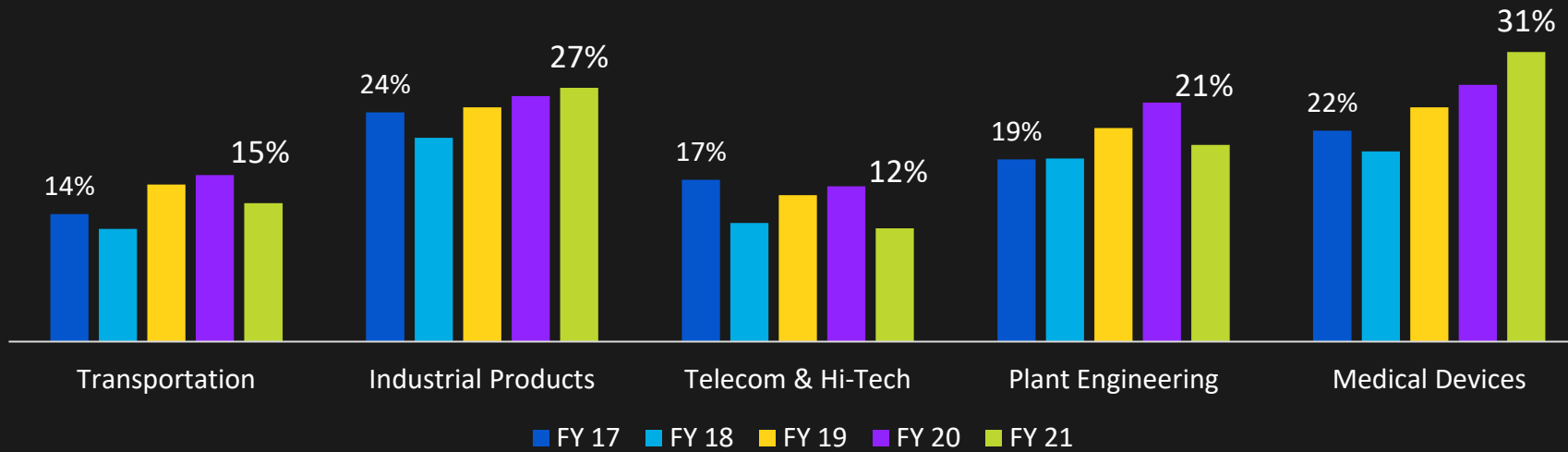
### Consistent Growth in Digital Share

#### Revenue Share - Digital Engineering



# PROFITABILITY

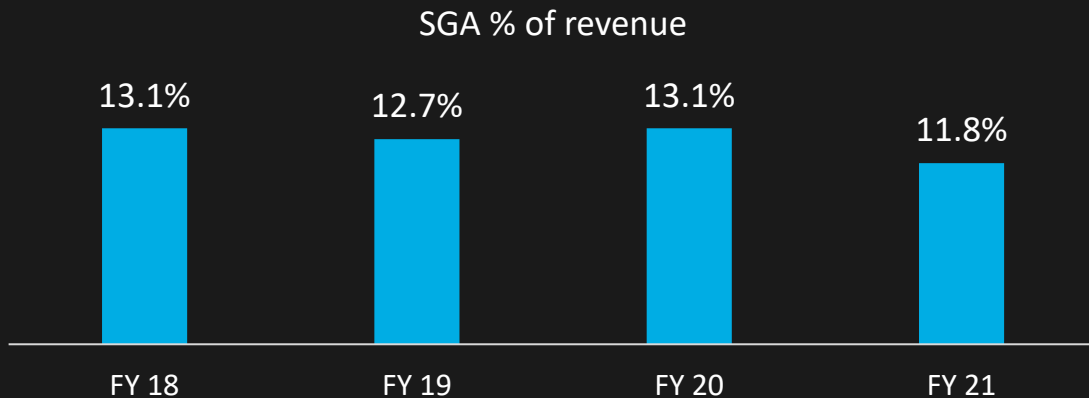
## Segmental Margin Trend



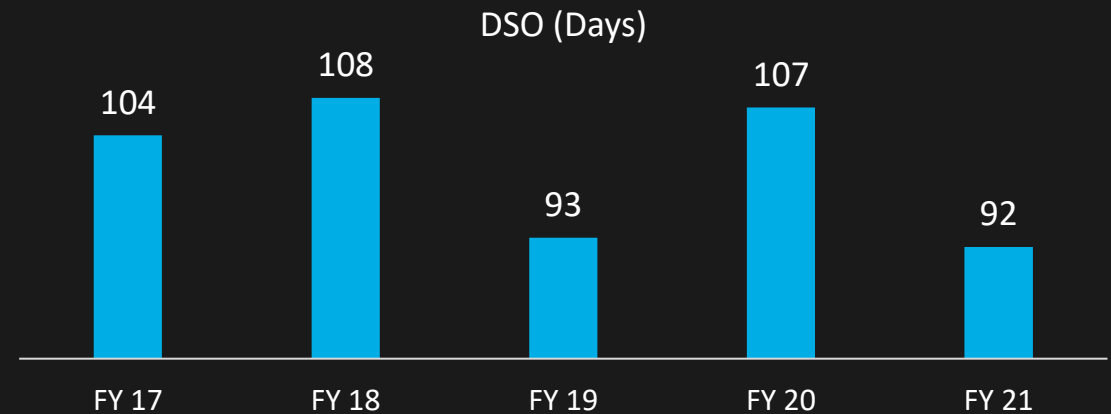
### Building resilience in the operating model

- Leadership and governance structure to support faster growth
- Labs and tech quotient to democratize innovation
- Continuous learning and upskilling for talent scale-up
- Higher offshoring and fresher intake

## SGA Trend



## DSO Trend

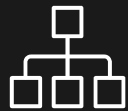


# GOVERNANCE

## Strategic M&A



## Finance Transformation



Revamp of Existing Processes



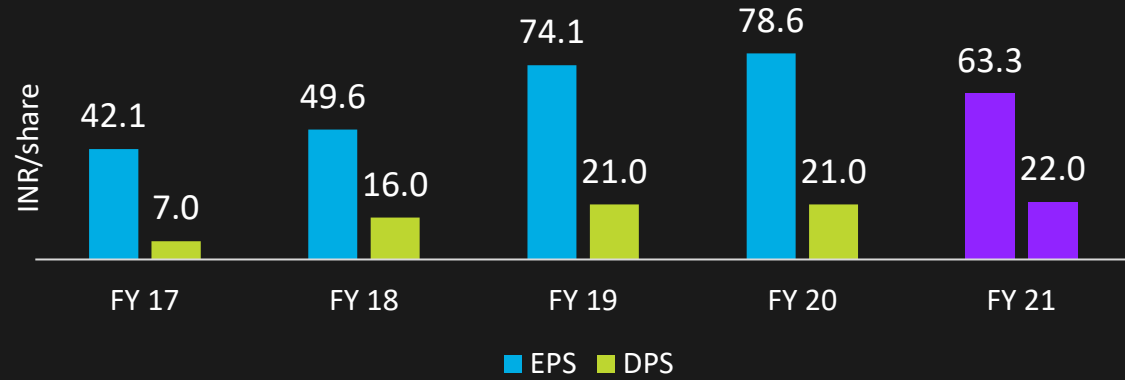
Automation for Scale Benefits



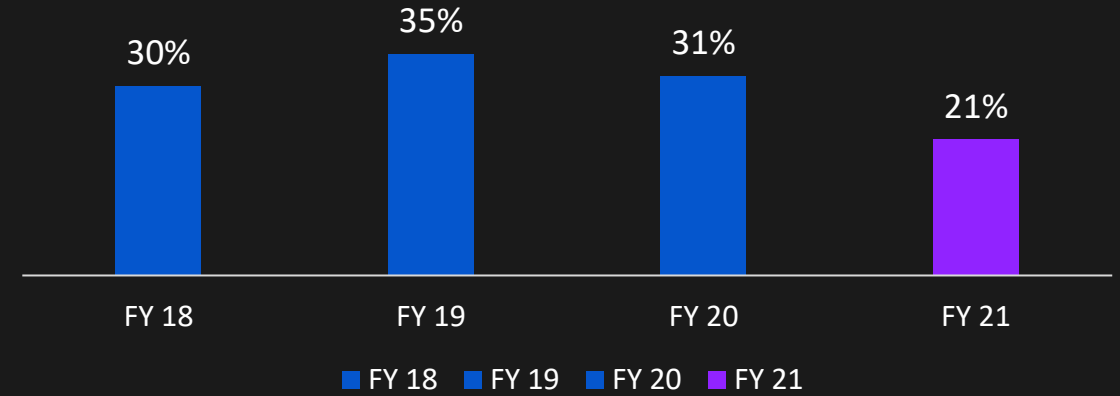
Analytics to improve Speed of Decision Making

# SHAREHOLDER RETURNS

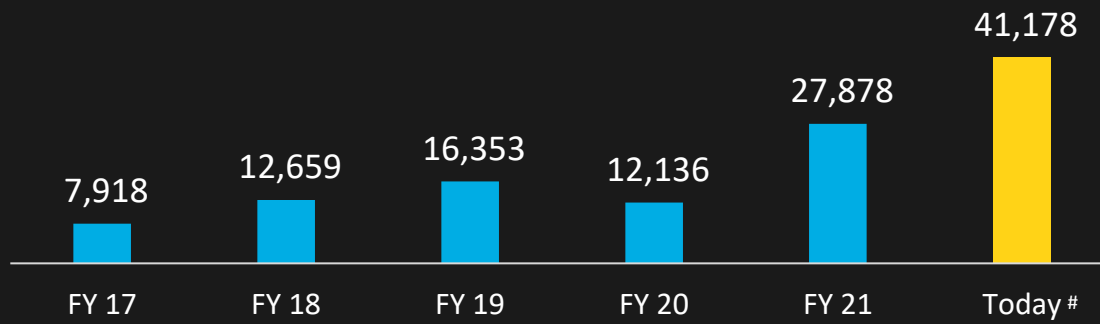
## Dividend Payout Trend



## ROE Trend

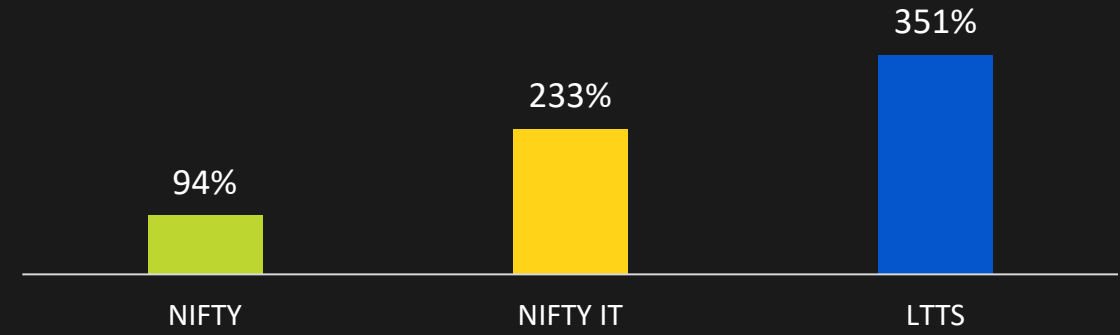


## Market Cap. (INR Cr)



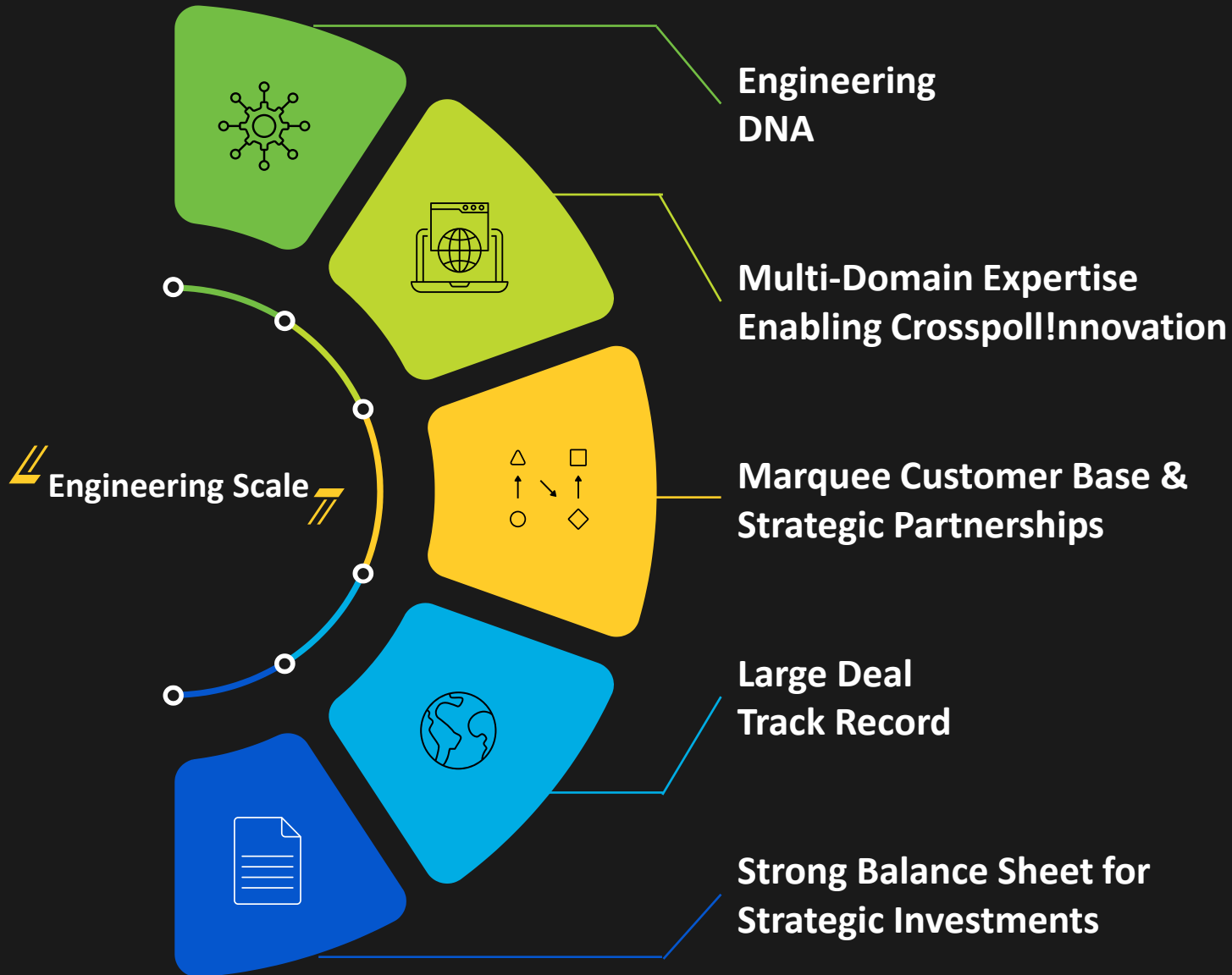
# As of 31-Aug-2021

## Returns Since LTTS IPO#



# Returns over the period 23-Sep-2016 (LTTS listing date) to 31-Aug-2021

# DIFFERENTIATORS



We aim to reach  
**\$1Bn** run rate by  
Q2-Q3 FY23  
&  
**\$1.5Bn** run rate in FY25  
with **18%** EBIT

**THANK YOU**

**THANK YOU**