

#GoDeeperToScale

Sustainability

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Investor & Analyst Day 2024

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Sustainability | A Global Phenomena and a Growth Market

“Sustainability is to create and maintain the conditions under which humans and nature can coexist to support present & future generations.”

- Environmental
- Economical
- Social

Evolution of Sustainability



2015

Modern era of sustainability
- UN SDG goals



1950-2014

Air Pollution Act
to Earth Day to Our
Common Future
to Green Brands



1892-1949

National parks to land,
water, wildlife, and
energy conservation

UN SDG



Our Focus Areas

Sustainability Indicators

98%

of CEOs agree
sustainability is their
responsibility

34%

of the world's largest
companies have set net-
zero targets by 2050

2.6x

ESG high performers
deliver a higher total
shareholder return

7.1x

Higher CAGR for
products with
sustainability labelling

2+ B

Increase in global
population by
2050

\$12 T

market growth due to
sustainability actions by 2030
across 11 categories

Trends | Higher Demand Driving Capex & Technology Adoption



~ \$1.1 T

Global CAPEX in 2030 - expected to grow from \$800 B in 2023



~ \$460 B

Global CAPEX in 2030 - expected to grow from \$250 B in 2023



~ \$980 B

Global CAPEX in 2030 - expected to grow from \$720 B in 2023

Oil & Gas



Continued stable demand for oil: 75 MBd → 102 MBd from 2000 to 2023 and expected to reach 110 MBd by 2030



Strong demand for gas: Production increase from 2.4 TCM in 2002 to 4 TCM in 2022 and is expected to grow to 5.3 TCM by 2030



Sustainable production with focus on safety, efficiency, and increased productivity



Consolidation of assets and technology to reduce carbon footprint / fuels to petrochemicals (O2C) / CCUS

Chemicals



Consistent higher demand forecast for specialty chemicals, agro-chemicals & CPG chemicals



Rising investments in Circular Economy - Plastic Recycling & Waste to Energy



Chemical industry supports more than 75% of all emissions reduction technologies needed to meet net-zero goals by 2050



IRA act fueling new projects in Semcon, Li batteries, Solar Panels: all need Specialty Chemicals

FMCG



Increase in demand for FMCG products across sub-segments



Continuously changing supply chain risks (Asia) & demography - Companies go Glocal



Value chain digitization sped up by AI, AR/VR



Value-consciousness driving innovation

Growth in demand for project engineering and digital for higher productivity, efficiency and reliability

Source: Market Research

Our Strategic Areas



**Projects Engineering-
Green & Brownfield**



**Sustainable
Manufacturing**



**Plant Modernization
& Automation**



**Digital
Technology**



Opportunities

Projects Engg. - Green & Brownfield

- Capex inflow in conventional energy
- Consumerism & customization
- Glocal initiatives
- Increasing demand for EPCm

Sustainable Manufacturing

- Emission Reduction Projects
- Hydrogen drive
- Net-Zero – WAGES*
- Circular Economy

* WAGES – Water, Air, Gas, Electricity, Steam

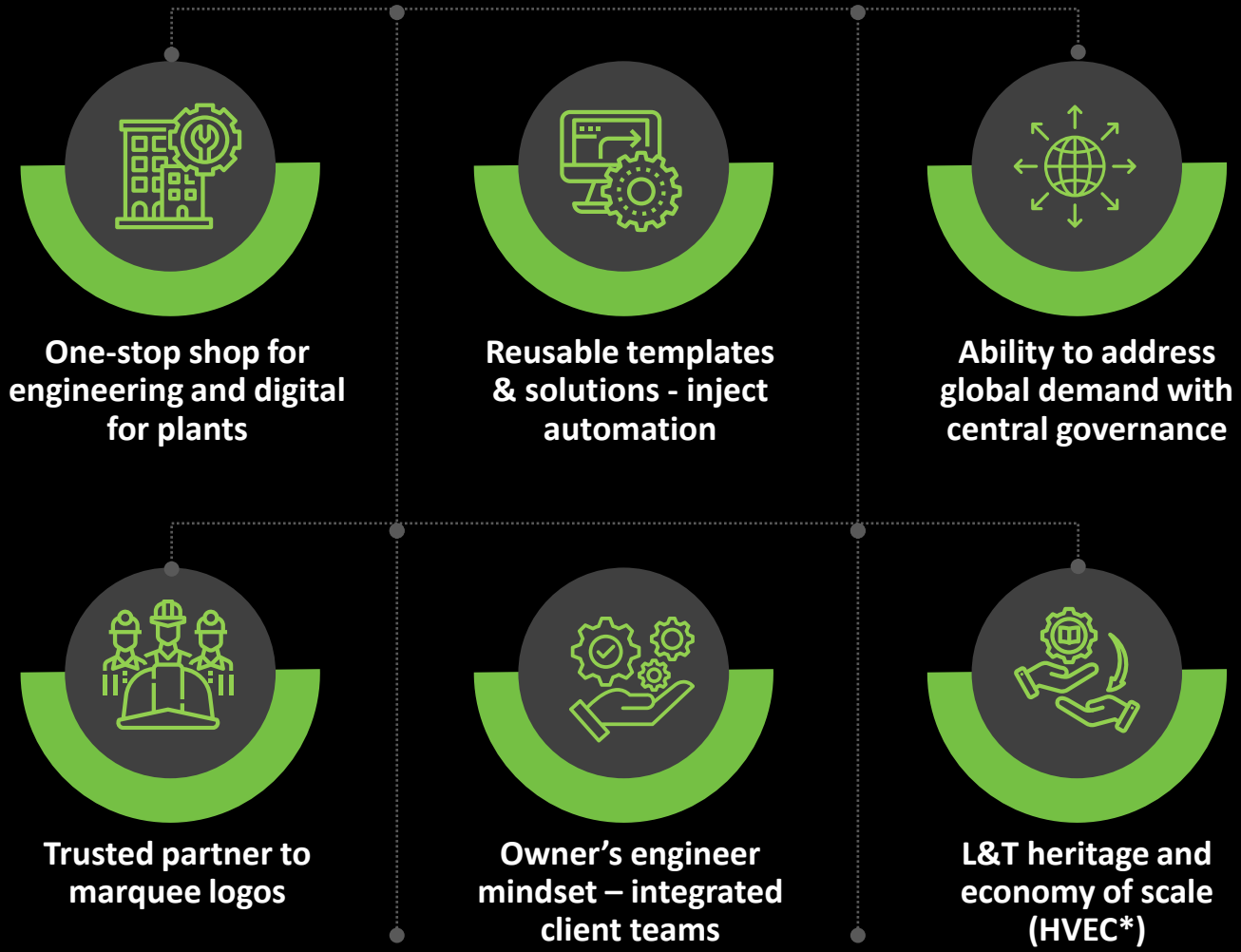
Plant Modernization | Automation

- Legacy equipment upgrade
- High Speed Manufacturing
- Cost effective speed-to-market
- Affordable automation to fill skill gap

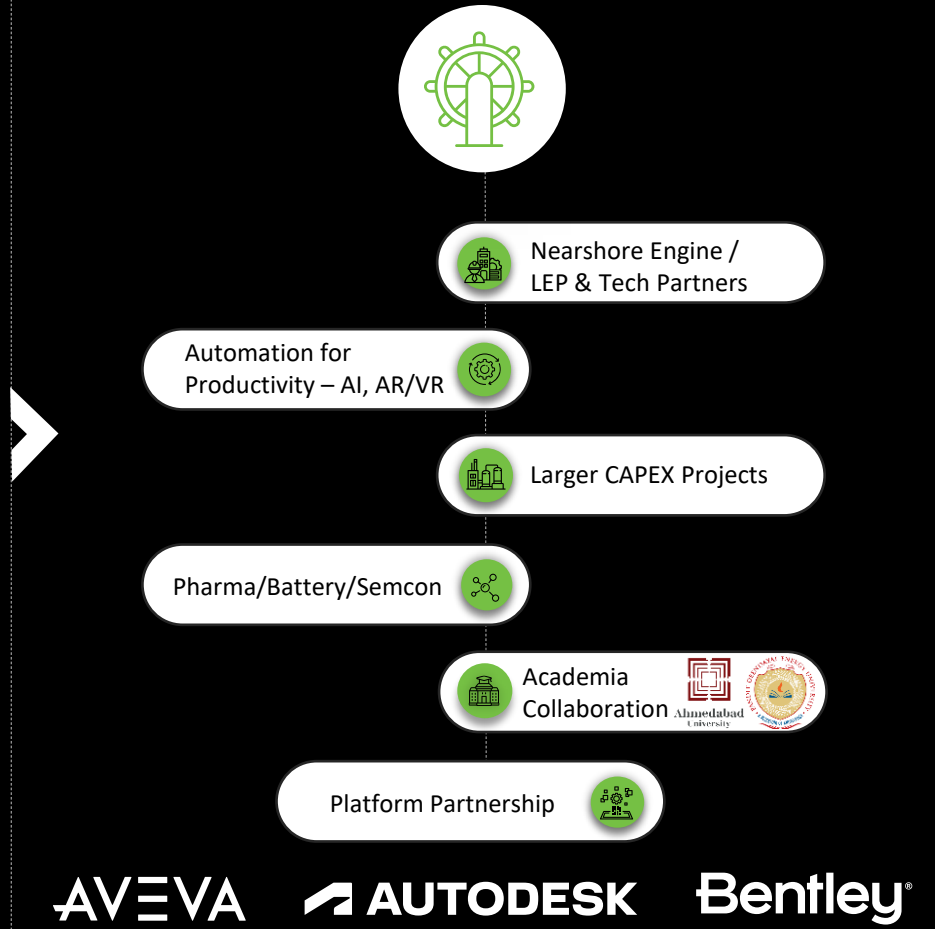
Digital Technology

- Asset health
- Predictive maintenance
- Digital twins
- Digital for Project

Our Differentiators and Future Proofing



Future Proofing Our Leadership Position



Continue to be a highly profitable business for LTTS and a leading engineering partner for our customers

* HVEC – High Value Engineering Centre

Impactful Credentials



\$100 Mn Deal
 Owned & Delivered with an O&G major in NA



Partnership with bp
 Projects, Operations, Maintenance and Low carbon initiatives



Partnership with Shell
 Multi-year integrated Engineering, Procurement, Digital, PM Consultancy



15 Yrs.+ Engagement
 With Global Home & Personal Care Major; LTTS presence @ 40+ sites



Swift Ramp-up
 Global CAPEX program of Agri Major worth ~\$3B+ TIC in NA & EU in a short span of 6 months



Global O&G engagement | Engineering, Procurement & Site Services | Net-Zero Emission & Fuel Optimization | Digital for Assets



IPA Plant | Brownfield Expansion | Scanning | Constructability Studies | Capex Savings with India Sourcing



Massive Edible Oil Refinery | Rough terrain, weak soil | 150+ Prefab Tanks | Multi-contractor Interface | Challenging Schedule



Multi-site Mechanical Integrity (MI) Program | Corrosion Management | Asset Reliability & Safety Management



Asset Healthcare | AI, IoT & Data Analytics-Led Solution | Anomaly Detection | Petrochemical Major



Food Processing Plant | High water-table | Construction Challenges | Unfavorable weather

Global Clientele

5
 of the Top 5 Global O&G majors

7
 of the Top 10 Consumer Goods Brands

3
 of the Top 5 Beverage Brands

4
 of the Top 10 Food Brands

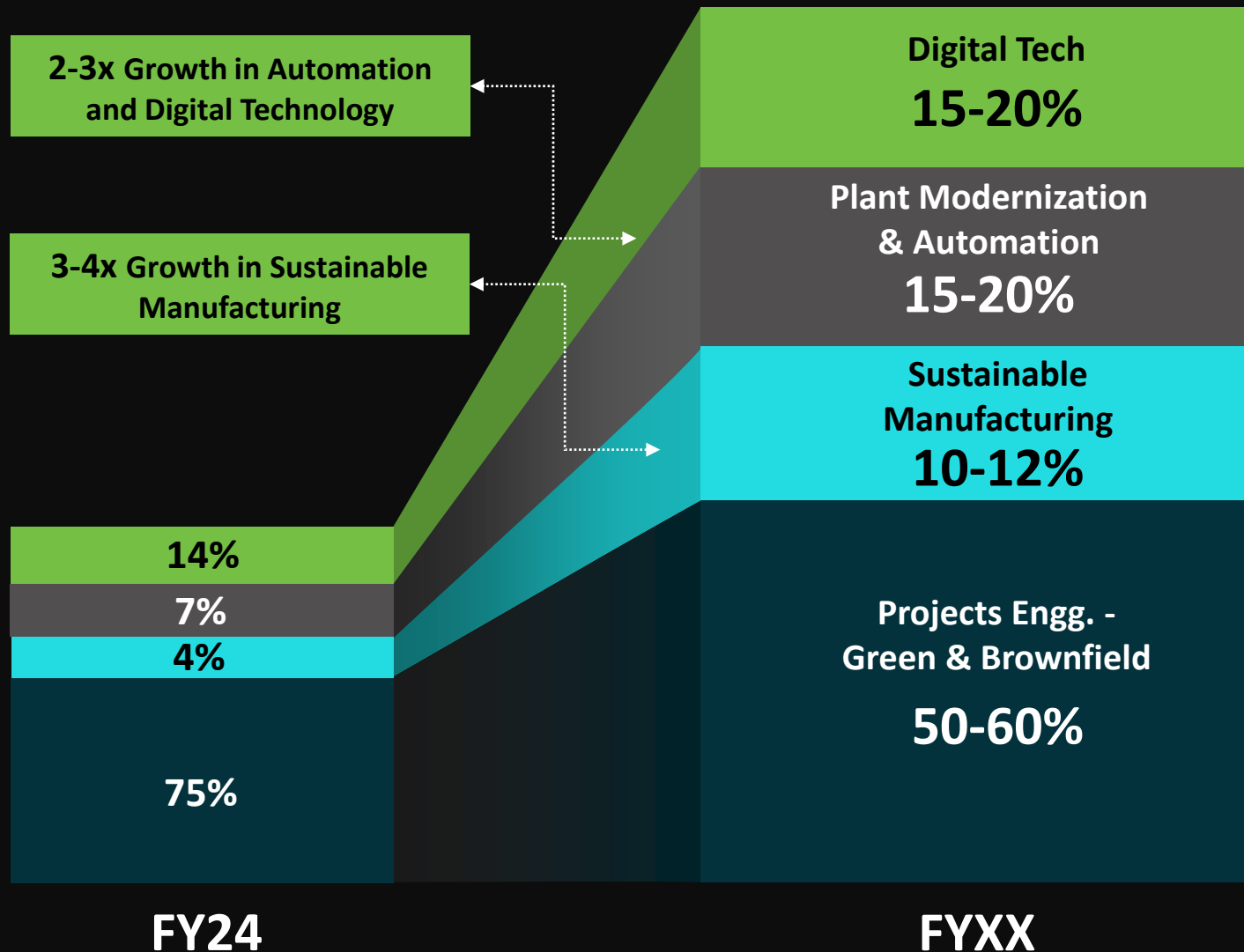
Large Deal Themes

Capex & Multisite Engineering

Multi-year and Annuity Business Model

Digital Rollout– Operational Excellence / Productivity

Our Growth Vectors



Focus Areas

Digital Technology

- Predictive Maintenance
- Overall Equipment Effectiveness (OEE) Solutions
- Asset Health, Reliability & Integrity
- Digital Twin
- Plant Operational Safety

Plant Modernization & Automation

- Legacy Plants Transformation
- Digital Twin and Simulators
- Automatic Packing Lines
- Automated Storage Solution
- Advanced Process Control
- Robots & Co-bots

Sustainable Manufacturing

- Emission Reduction
- Energy Transition
- Energy & Water Mgmt.
- Hydrogen
- Circular Economy

Projects Engineering - Greenfield & Brownfield

- Project Consultancy
- E/EP/EPCm Projects across O&G, Chemicals, FMCG and Adjacent Domains
- Facility and Large Project
- Pre-FEED, FEED, DED Services
- Standards/Procedures Optimization

Trends and Customer Focus Areas



~ \$300 B
Global Electrical Controls Market in 2030





~ \$1.9 T
Global Machinery Market in 2030





~ \$1.2 T
Global Green Facilities Market in 2033

Electrical Power & Controls


 Proliferation of Renewable Energy and its integration with the current energy systems (35% of current global electricity is through renewables)


 AI based smart power management (Adaption of AI in more than 30% of smart city applications by 2025)


 Advancements in Energy Storage solutions


 Digital intelligence driving enhanced energy security and grid resilience

Machinery


 Focus on energy efficient machinery products leading to large scale legacy equipment upgradation


 Increasing adaption of digital thread, automation and smart technologies across PDLC (75% of enterprises are pursuing and adopting automation within their ops)


 Enhanced throughput and safety using AI & Machine Vision enabled robots


 Adaption of Additive mfg. across diverse use cases leading to improved design & mfg.


Building Technology

 Build out Data centers and Giga-factories

 Informed decisions about energy usage, space optimization through data science

 Integration of IoT and AI in smart buildings

 Advanced security systems prioritizing health and well being

 Cloud-based Building Management System

Industrial Business moves with purposeful changes towards Sustainable and Smart Technologies

Our Strategic Areas



Product Engineering

Energy Transition



Manufacturing Modernization

Alt+Shift to Platform Solutions



Opportunities

Alt+Shift to Platform Solutions

Intelligent Edge	Digital Engineering Platforms	IT-OT Convergence	Digital Thread
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Manufacturing Modernization

Robotics & Automation	Virtual Manufacturing	Plant Digitalization	Apps & Analytics
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Energy Transition

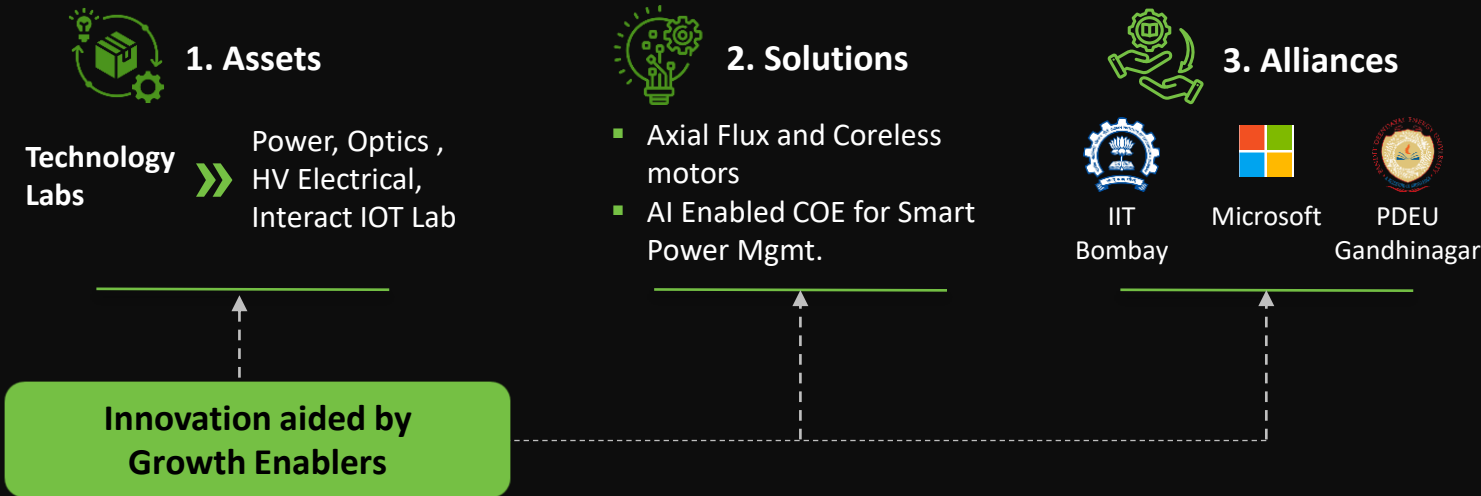
Renewable Integration	Fuel Cell Applications	Smart Grids and DERs	New Age Data Centers
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Product Engineering

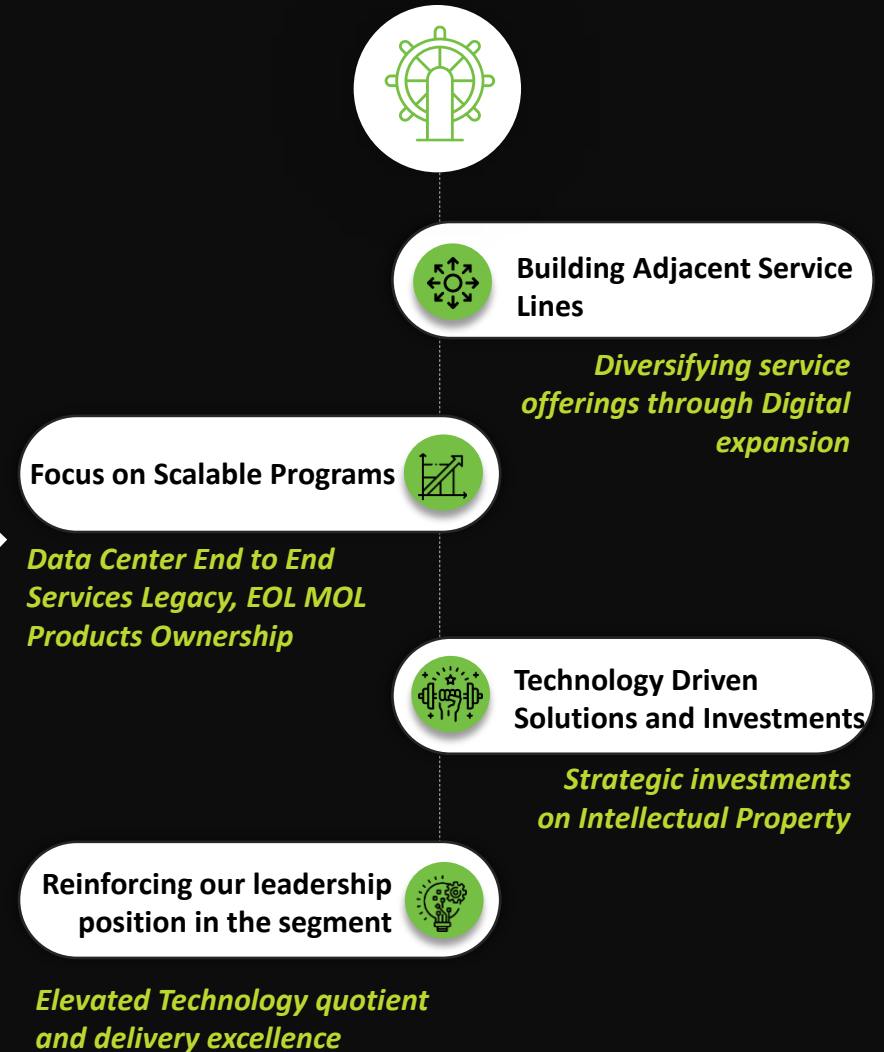
Product Dev. & Enhancement	Sustenance Engineering	Verification and Validation	Mfg and Supply Chain
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LTTS' Areas of Focus are aligned to our Customer Investments and Global Sustainability Initiatives

Our Differentiators and Future Proofing



Future Proofing Our Leadership Position



Credentials Enabling our Strategic Focus

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6

4

Electrical Power & Controls



Leading Wind Turbine OEM



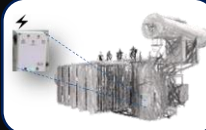
Digital | Factory Injury Reduction through Data Science

Major Intelligent Automation Conglomerate



Digital | Power Management products & IIOT Solutions for Energy Monitoring

Technology leader in electrification & automation



R&D | Sensorization of Transformer for Health Monitoring

of the Top 10 Global Automation Conglomerates

of the Top 10 Building Tech Organizations

of the Top 5 Renewable OEMs

Value to our Customers



Machinery

World's Largest Tool company



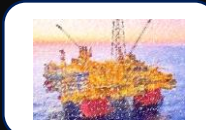
NPD | End to End PDLC Transformation

Cleaning Products Major



Design | Product Transformation on Floor cleaning Equipment

Largest Oil Services Organization



Digital | ETO, SW Modernization for Capital equipment utilization



Larger Programs Resulting from Strong Credentials

Multi-Year PDLC Sustenance Programs

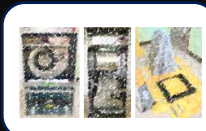
Product & Manufacturing Digital Transformation

After Market Managed Services Programs



Building Technology

Global HVAC Major



R&D | PDLC (Mfg. Digital intervention), China+1 strategy, Energy Transition

Leading Elevator manufacturer



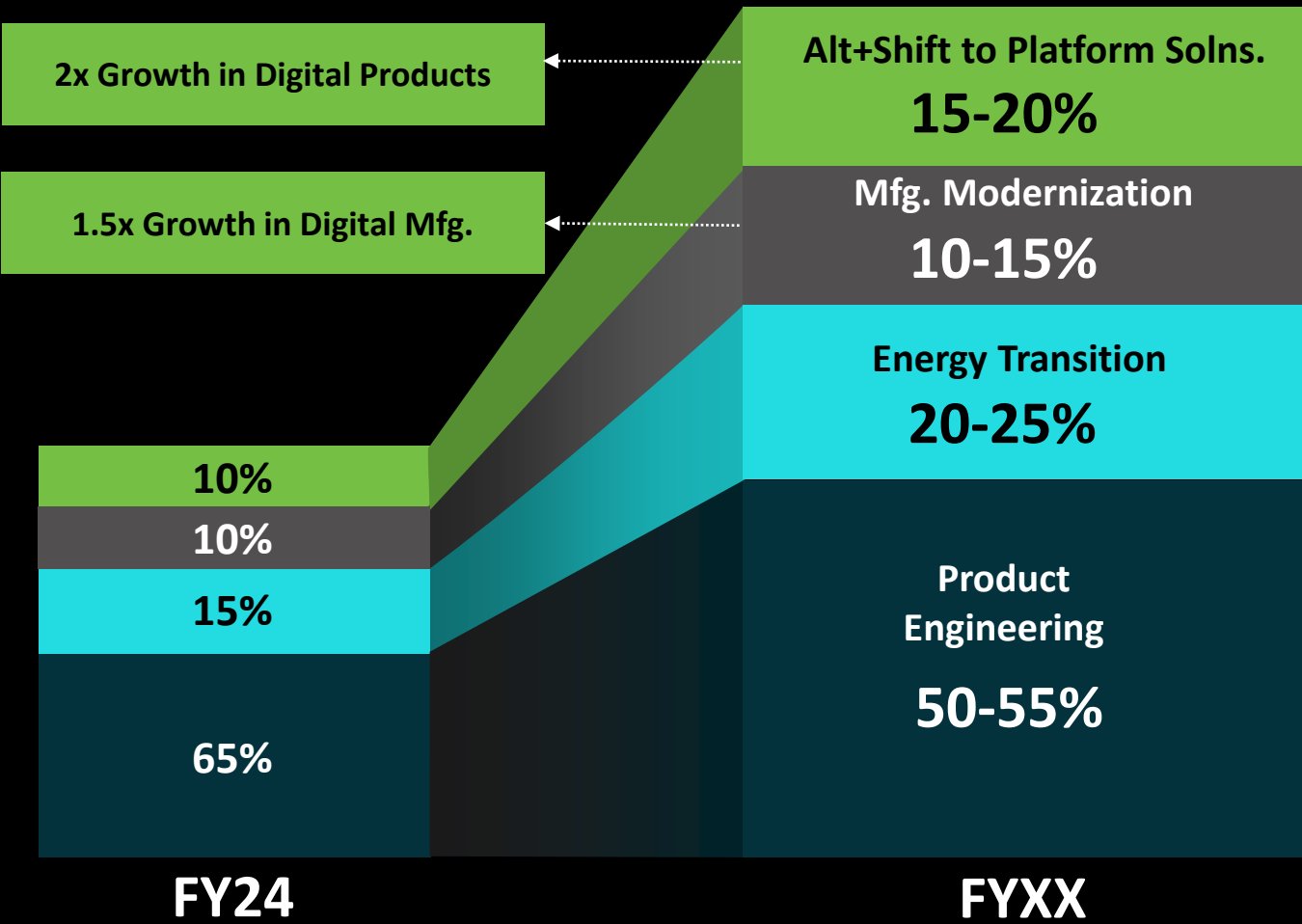
NPD | Control Panel Design and Development

Multinational Conglomerate Corporation



Product Value Engg | Core controls platform, Joint GTM for Data centers & Giga factories

Our Growth Vectors



Focus Areas

Alt+Shift to Platform Solutions

- Digital Thread Adaption
- Digital Platform and Appn. Engg
- Embedded Sustenance Programs – Obsolescence Mgmt.
- Digital Twin and Connected Products

Manufacturing Modernization

- Robotics & Automation
- Additive Manufacturing & Re-Engineering
- Paperless Factory
- Upgradation of Legacy assets

Energy Transition

- AI Enabled Smart Energy Solutions
- Renewable power sourced Data Centers
- Zero Energy Infrastructure Technology
- Carbon Capture and Green Hydrogen Generation
- Alternate Fuel Technology

Product Engineering

- Conventional PDLC programs
- General Manufacturing and Services activities
- Asset and content management programs

Drive **Sustainable** and **Profitable** growth by **reinforcing our market leadership**, collaborative **innovation** and **focusing on scalable business opportunities**

We are Noticed...



Leaders in Industrial Ratings by Zinnov



Leader among 18 providers in the Manufacturing Smart Industry Services by Avasant



Leaders in Oil and Gas Industry – Services and Solutions for Enterprise Asset Management Study by ISG



Leadership zone across Digital Engineering Services by ISG

Awards and Accolades



'Global Alliance Partner of the Year' by AVEVA



Innovation in EV Charging Infrastructure

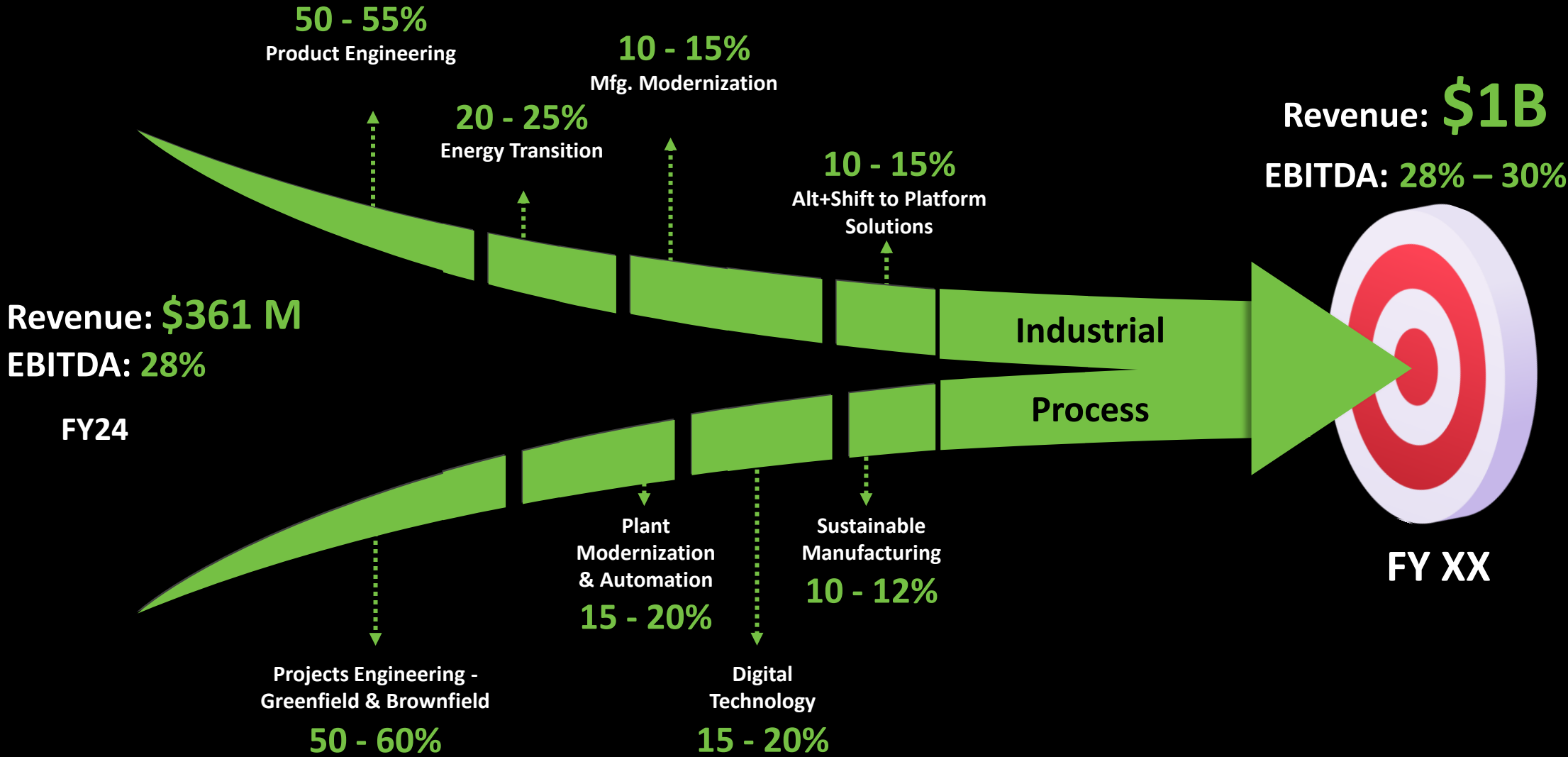


Sustainability Partner of the Year by PTC for ESM Solution



TOP 25 Innovative Companies In India

Our Aspiration – Sustainability Segment



Purposeful.
Agile.
Engineering.

Thank You