

#GoDeeperToScale

Tech

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Tech Segment: Hi-Tech & Med-Tech

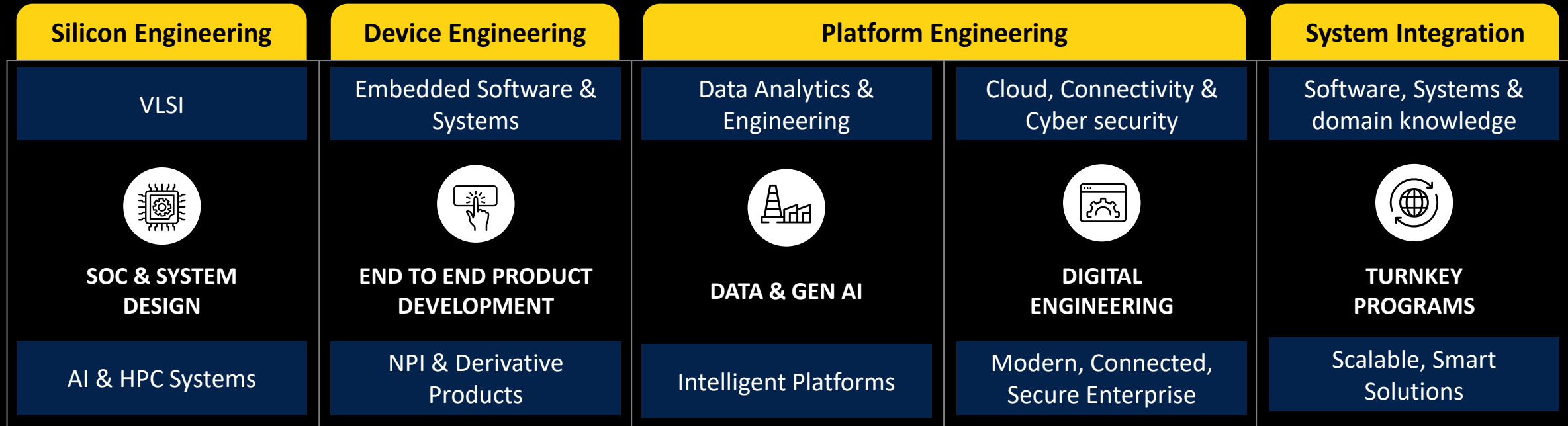
Med-Tech

- Medical Devices
- Pharma
- Life Sciences

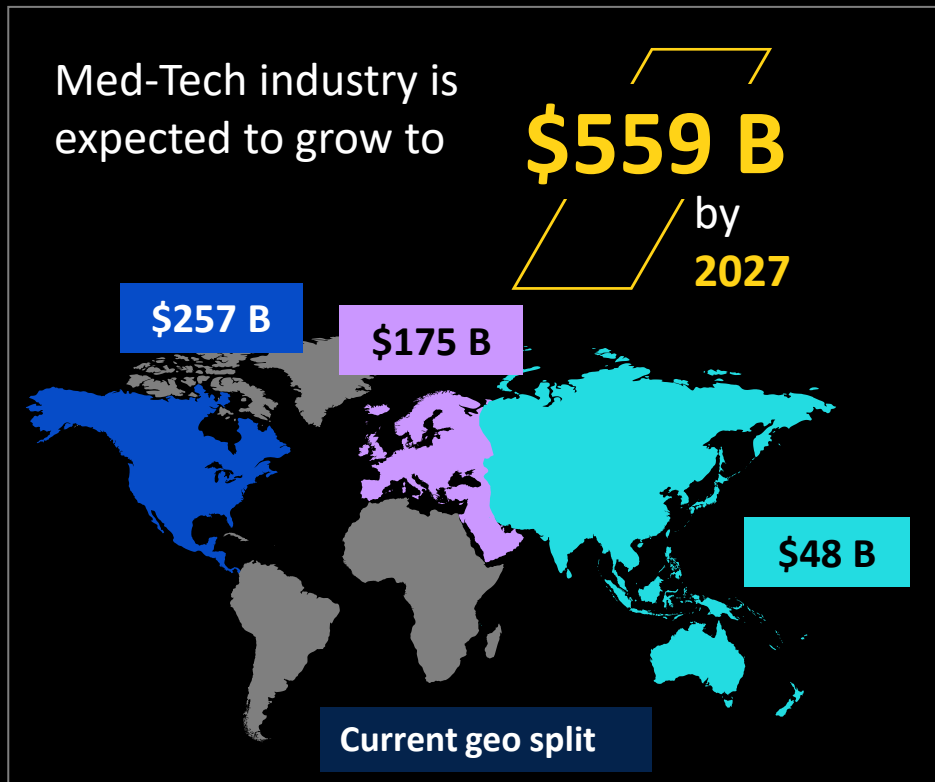


Hi-Tech

- Semiconductors
- Media and Entertainment
- Consumer Technology
- Telecom
- Hyperscalers
- ISV
- Smart Cities and Utilities

Trends in Med-Tech Industry



Business Trends

- Favorable government policies
- Increase in the adoption of AI/ML in Healthcare
- Margins under pressure
- Vertical integration/ expansion
- Changing client preferences
- Regulatory and compliance hurdles
- Data security and privacy

Technology Trends

- Digital Health
- SaMD & AI-enabled Medical Devices
- Digital Manufacturing
- Digital Twin
- Point of care devices
- Minimal invasive surgery
- Quality & Regulatory

Digital Technologies & AI are boosting growth & new opportunities while data security & privacy challenges prevail

Top Spenders



LTTS Strengths & Focus Areas

Top **10** of **10** Med Device Companies @ NPS: 9.5

AI based Med-Tech solutions

AiCE | AiCH | AiTest | Chest-rAi | AiViz

Digital Health Platform

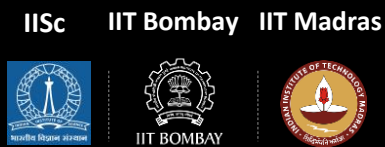
263+ Patents | **LTTS 71 (27 AI)** | Clients 192

Strong Partnerships

Technology Leaders



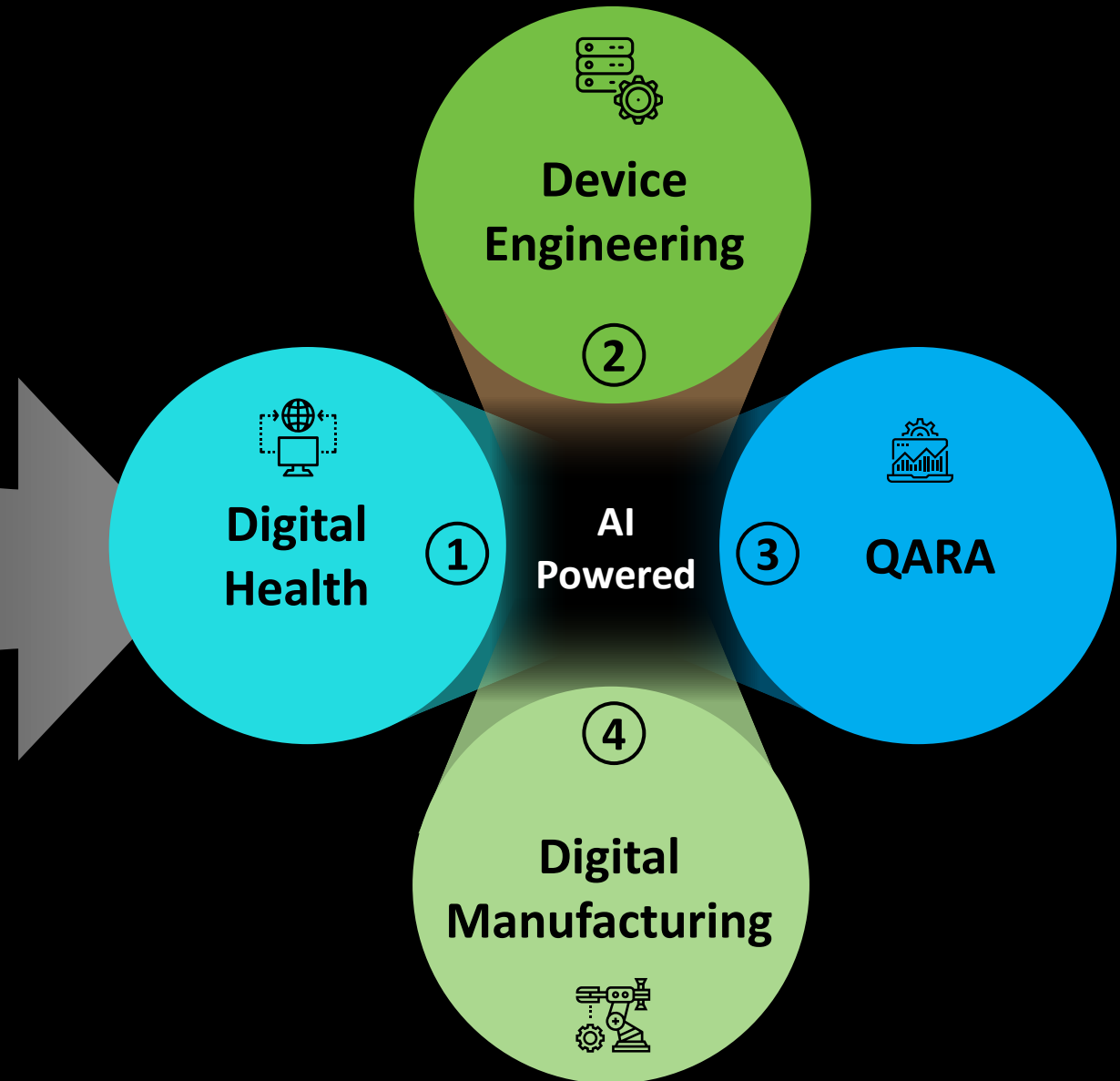
Academia



Specialized lab infrastructure

NVIDIA Experience Hub | Wet Lab | Imaging Lab | IoT Lab | AWS Lab | Smart Manufacturing Lab | Think Studio | Pre-Compliance Lab | Industrial CT Scanner

Source: mpo-mag.com



Offerings



Digital Health

App & Platform Engineering

AI & Analytics

DevSecOps

Visual Imaging framework

AiViz

Clinical decision support system

Chest-rAi

Partnerships

NVIDIA, Hyperscalers

Digital Platforms

CareConnect

AI Enabled Platforms

Asset Health Framework*

Labs

AWS, IoT

Compliant to Healthcare Standards (HL7, FHIR, DICOM)

Differentiators

Success Stories



Digital Surgery Platform for Surgical Devices

Digital surgical suite | Efficient surgical procedures | Enables clinical workflow | Improved surgical outcomes

Enabled Surgical Device Connectivity

Secure Cloud-enabled Ecosystem



Device Engineering

Product Design Services

Value Engineering

Sustenance Support

Connected Devices

Edgyneer**

Robotic Surgery

Robotic Endotrainer*

Wearable Solutions

Cuffless NIBP

Gen AI Test frameworks

AiTest

Partnership Institutions

IISc, IIT Bombay, IIT Madras

Labs

Tear down, Think Studio



Robotic assisted surgery system: Value Optimisation

Provided Solution for Dfx issues | >30% ideas taken for implementation | \$20+ Mn minimum annualized savings

Digital Health & device engineering together redefine Med-Tech industry merging digital innovation with healthcare devices

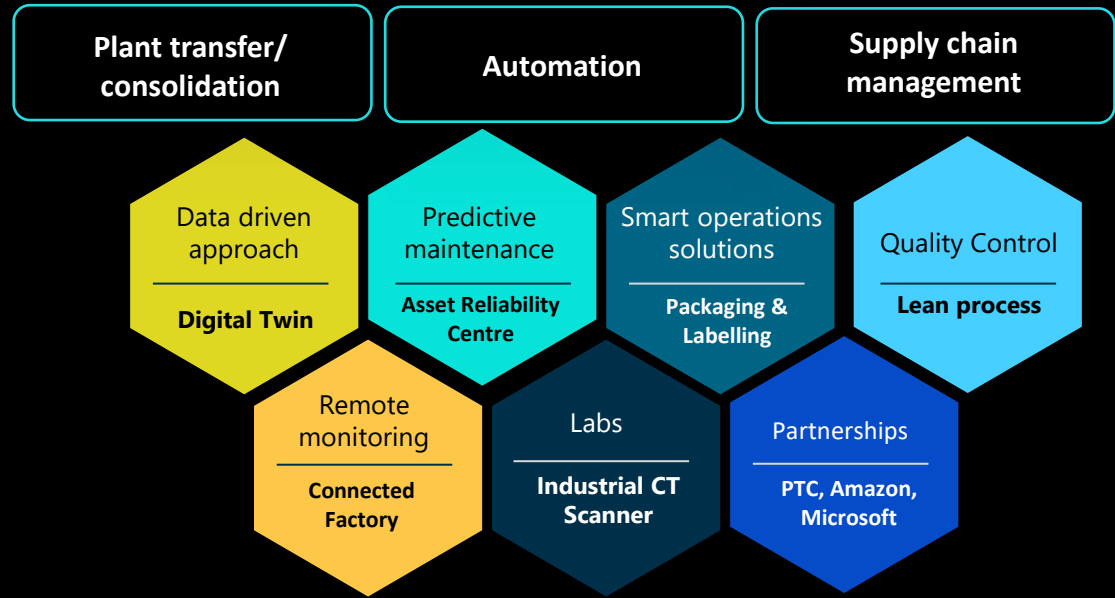
Offerings

Differentiators

Success Stories



Digital Manufacturing



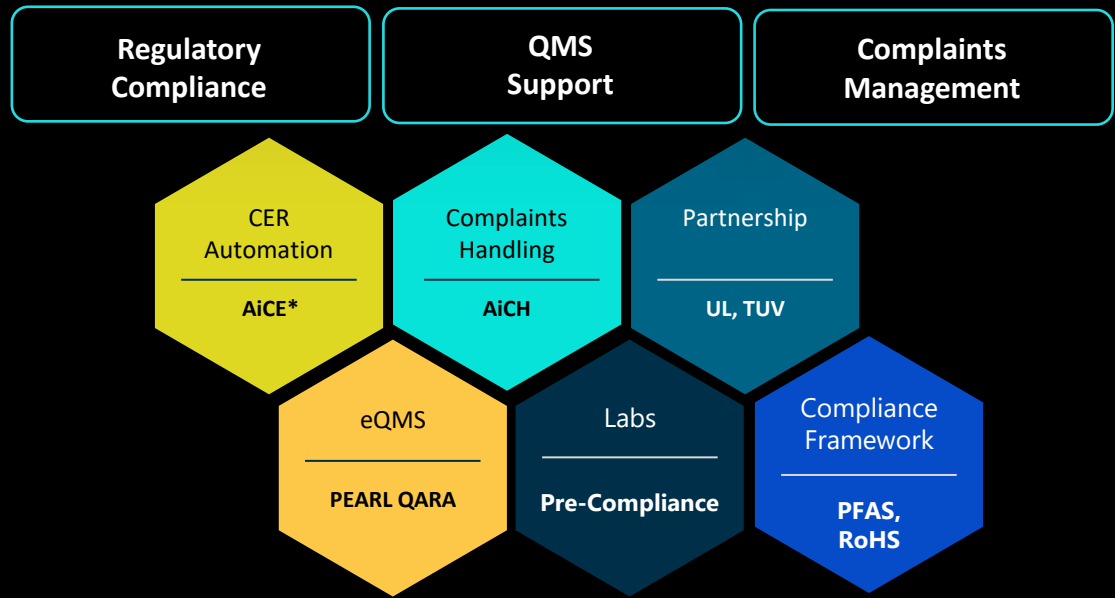
Frugal Plant transfer for patient care products

USA to MX transfer | Current/ Future state value stream mapping | Lean layout development | Inventory optimization

35% Space Utilization **33%** Inventory cost reduction



QARA



Regulatory Compliance (AiCE)

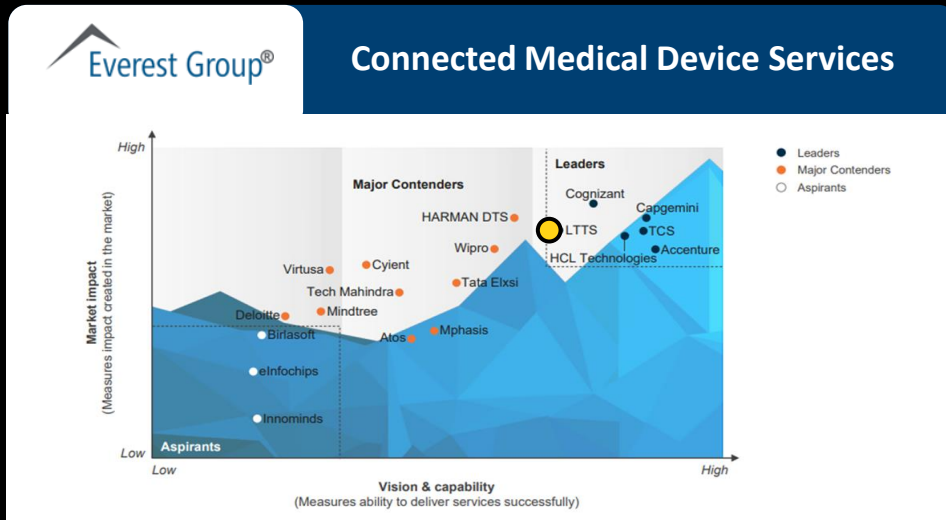
Clinical Evaluation | AI based Automation of CER reports | Faster TAT | Quick scaling | Enhanced CER approval

30% Productivity Improvement **90%+** Improved AI model accuracy

Digital manufacturing demands precision; QARA ensures it

**NASSCOM Awarded*

The World has Taken Notice and Recognized us as a Trusted Partner



LTTS in the news

“ Business Standard
 LTTS Collaborates with **NVIDIA** to unveil Gen AI & advanced Software-Defined architecture for Medical Devices

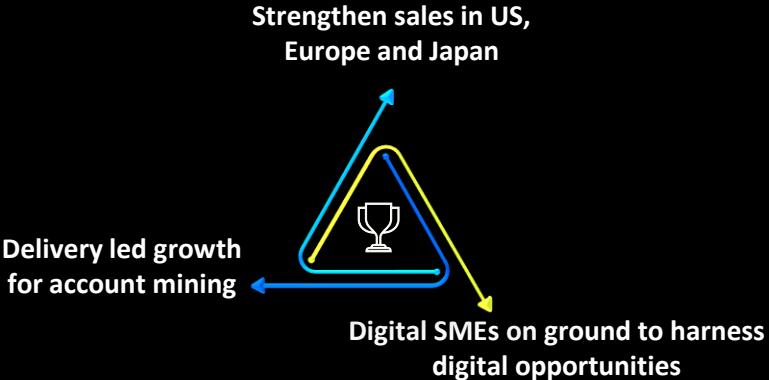
“ THE FINANCIAL EXPRESS
 Smart Healthcare: AI detects what the image misses

Awards & Accolades

<p>Chest-rAi</p>	<p>Best innovation process - AiCE</p>	<p>POC Sepsis Analyzer</p>	<p>Best innovation process - AiCH</p>	<p>Engineered-In-India Product of the Year, Robotic EndoTrainer</p>	<p>EDGYneer</p>	<p>Innovators' Excellence Award Chest-rAi™</p>
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LTTS Med-Tech Poised for Accelerated Growth

Growth measures



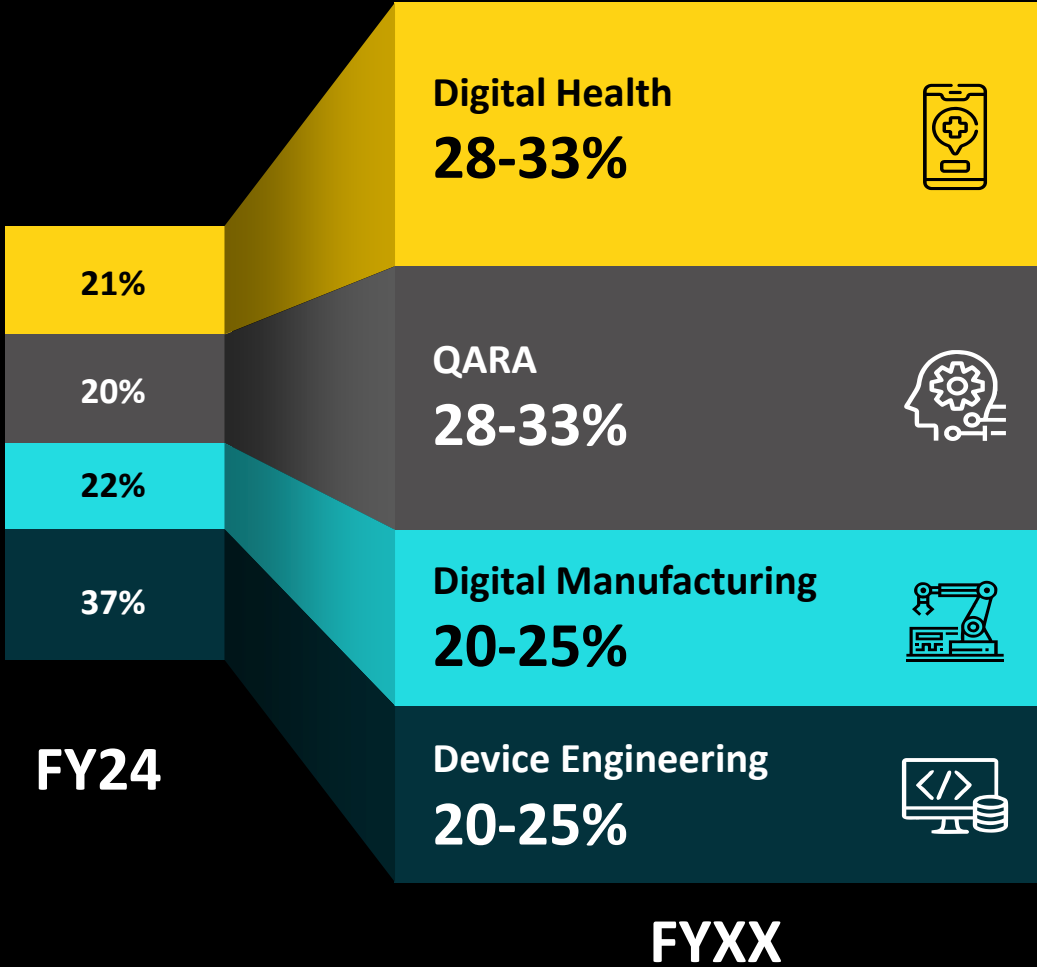
Large deal themes

- 01

AI-enabled QARA
- 02

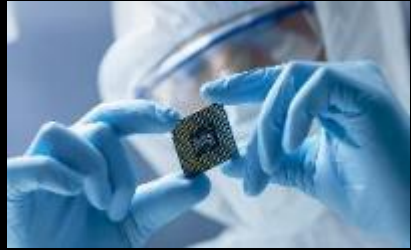
Digital Health Platform
- 03

Plant consolidation



Future of Med-Tech is DIGITAL, driven by AI - but in a highly compliance-driven environment (QARA)

Hi-Tech –Engineering **AI Powered** Connected Intelligence



Semcon



Consumer & Media



Telecom



Hyperscalers & ISV



**Enabling clients
deliver at scale**

AI & HPC Systems

**NPI & Derivative
Products**

**Modern, Connected,
Secure Enterprise**

**Scalable, Smart
Solutions**

Silicon Engineering

Device Engineering

Platform Engineering

System Integration & roll outs



intel.

Qualcomm

Leveraging an ecosystem of 360⁰ partnerships

Microsoft



paloalto
NETWORKS

Chipping in for **Semcon** Clients

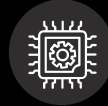
Market

\$850 B+
by 2028

Trends



\$100 B+ investment in **High Performance Compute (AI driven)**



GAMM players are exponentially increasing **silicon development spend**



Explosive demand in new markets is necessitating **shorter NPD cycles**

Silicon Engineering

- Turnkey SoCs- 3, 4 and 5 nm
- Low-Power and High-Performance design
- Pre & Post silicon validation

Platform Engineering

- AI PC applications engineering
- Embedded AI
- Industry specific adaptations

Highlights

- ODCs with all major clients
- Intel - Lab Partner of the Year

Differentiators

- Integrated silicon, software and system expertise
- State of the art labs with all Semiconductor majors
- Global presence - Israel, Poland, US & India

Case Study

Major Semcon Player

- Support in AI chip designs
- Working across all chip design areas from design to tape-out

2+

Years of
Engagement

5

nm
designs

Growth Strategy

- Scale VLSI engineering teams
- Grow post silicon validation capabilities
- Enhance expertise in AI, cloud based solutions

Work with **6 of the top 10 Semcon companies**



Engaging with Media and Consumer Technology

Market

\$3.5 T+
by 2028

Trends



Cloudification, AI, DevOps for an evolving client experience



M&E products becoming more digital, leading to decline in cost of production and distribution

Device Engineering

- Android adaptation across devices
- Device certifications
- Product derivatives

Platform Engineering

- Test automation framework – EvQUAL
- Video and OTT services framework

Highlights

- Long term engineering partnerships with all leading phone manufacturers
- Alliance with RDK, QuickPlay
- Building advanced connectivity labs (5G, Wi-Fi, Bluetooth)

Differentiators

- Android powerhouse
- Expertise in the Media & Telecom operations value chain
- AI platform for efficient media operations

Case Study

Leading Smart phone manufacturer

- Support in key embedded areas, certification/ verification
- Helped in developing manufacturing ecosystem in India

3+

Years of engagement

15+

Countries support

Growth Strategy

- Scale device engineering & media operations with leading clients
- Assisting clients with China +1 strategy
- Inorganic growth through accelerators such as EvQUAL, AIOps, etc.

Work with **6 of the top 10 Media & Consumer companies**



Connecting the **Telecom** World

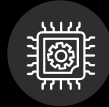
Market

\$2.5 T+
by 2028

Trends



Increasing focus on network optimization & monetization through AI solutions, API



Ever-expanding connectivity, X-RAN adaptation, edge computing



Virtualization and operational improvement initiatives

Device Engineering

- End-to-end product development
- Operator deployments of network elements and after market support

Platform Engineering

- AI based predictive maintenance, network optimization
- Digital Twins: Mobile tower twin

System Integration

- Large turn-key deployments for rural connectivity in India
- Network rollouts and support through NOS/ SOC

Highlights

- Network automation and orchestration
- Enterprise 5G network roll outs

Differentiators

- Lab investments in 5G, champions in lab built up
- Good balance of OEM and operator clients

Case Study

Bharat Net Programs

- Digital infrastructure (scalable, robust & secure)
- Affordable & reliable (speed broadband to remote areas)
- Network Operations Center, B/OSS, GIS integrations

Growth Strategy

- Scale operator business using differentiated engineering offerings
- Carveouts & vendor consolidation
- Expand enterprise 5G offerings

Work with **5 of the top 10 Telecom companies**



Growing with **Hyperscalers and ISV**

Market

\$1 T+
by 2028

Trends



Pervasive expansion to devices – Meta, Google, Amazon



Accelerated adoption of AI and analytics



Cybersecurity measures

Platform Engineering

- Fusion platform for real-time vision analytics
- API hub + App studio solution
- DevSecOps platform

Silicon Engineering

- Involved in next gen data center chip designs for Hyperscalers
- Extensive Embedded Engineering for cutting edge devices

Highlights

- Focused on Cyber security, Cloud, AI & Data ISVs
- Leveraging Hyperscalers partnerships across industry domains to drive growth

Differentiators

- OT capabilities generating interest for software platform providers, cybersecurity enterprises
- Device expertise helping to penetrate expansion plans of clients

Case Study

Large Cybersecurity ISV

- Developed an industry leading OT security product – mentioned in Forrester report
- Product engineering support for data loss prevention and AI access tools

Growth Strategy

- Significant scaling of AI and Analytics teams
- Building solutions in Hyperscalers Gen AI platforms

Work with **4 of the top 5 companies**



Focusing on Large Deals

Strategic wins

50M+
5Yrs

Media platform carve-out

Platform sustenance & support for global clients

25M+
3Yrs

Major Semcon major

3 new ODCs for silicon development programs

70M+
3Yrs

2 Metro Rail projects

Telecom subsystems

15M+
2Yrs

Major Smartphone vendor

Engineering partner for geo diversification (C+1 strategy)

100M+
5Yrs

Maha-Cyber

First of its kind AI-enabled Security Operations Center

Market trends & Large deal themes



Product
carve-outs



Vendor
consolidation &
managed
services



Platform
support for
operators



Next-Gen
product
development

Active pipeline

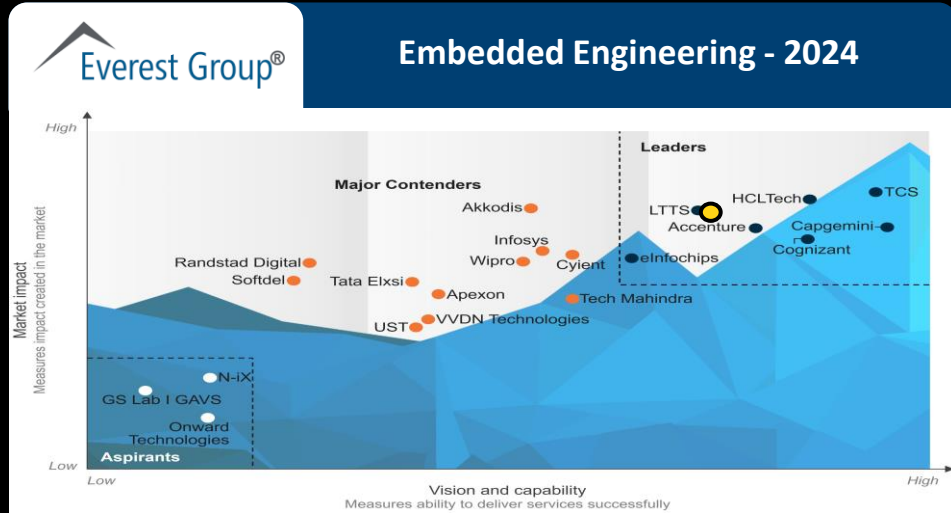
Multiple media
products
takeover for
cost efficiency

Telecom after
market support
optimization

Next-gen X-RAN
product
customization &
deployment

Lab
consolidation
and geo-
optimization

Hi-Tech: Credentials and Growth Trajectory



Awards & LTTS in news



Innovation in IoT for EDGYneer



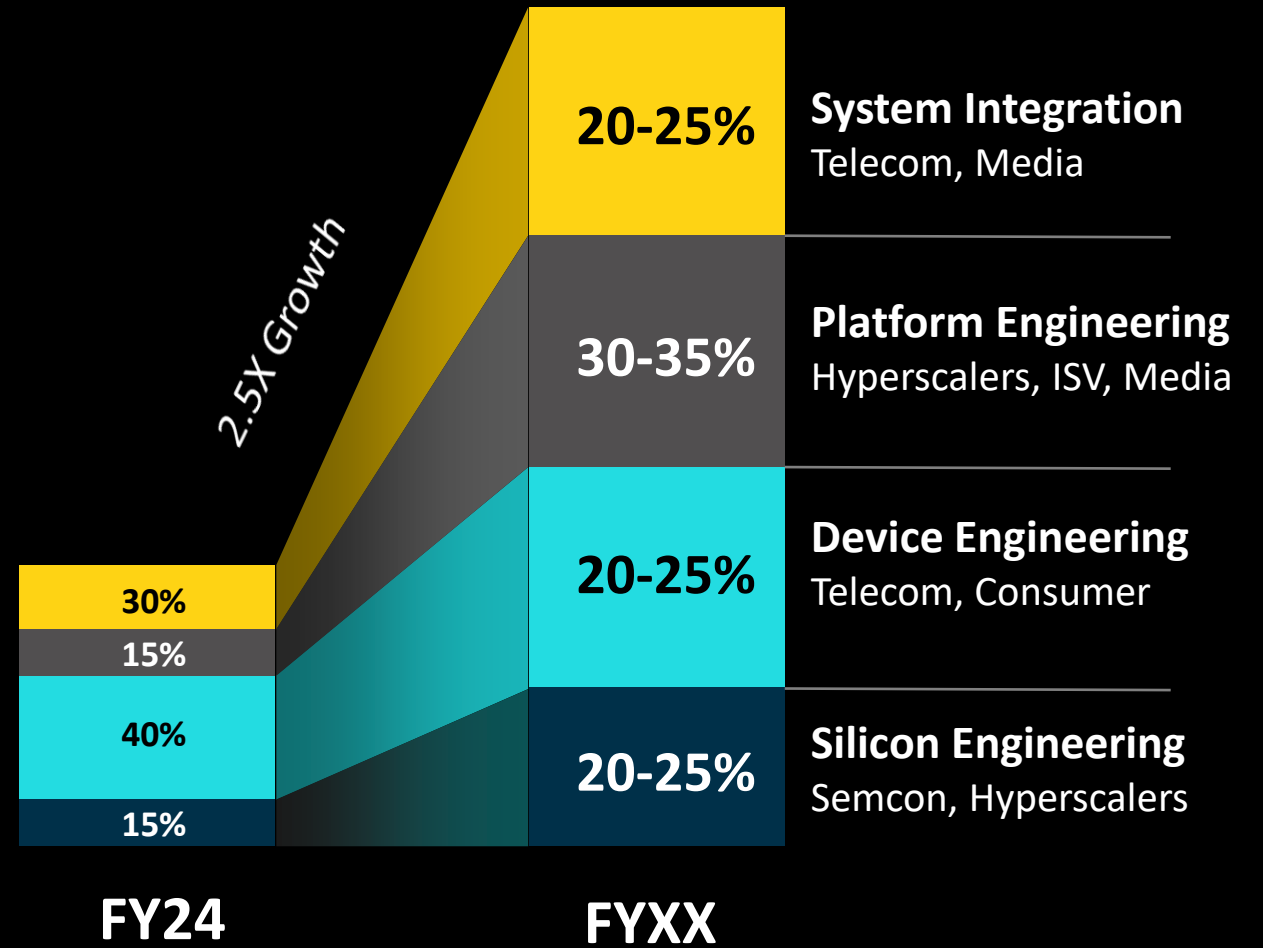
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In AI, we are accelerating our investments and innovation focus leading to over 61 patents

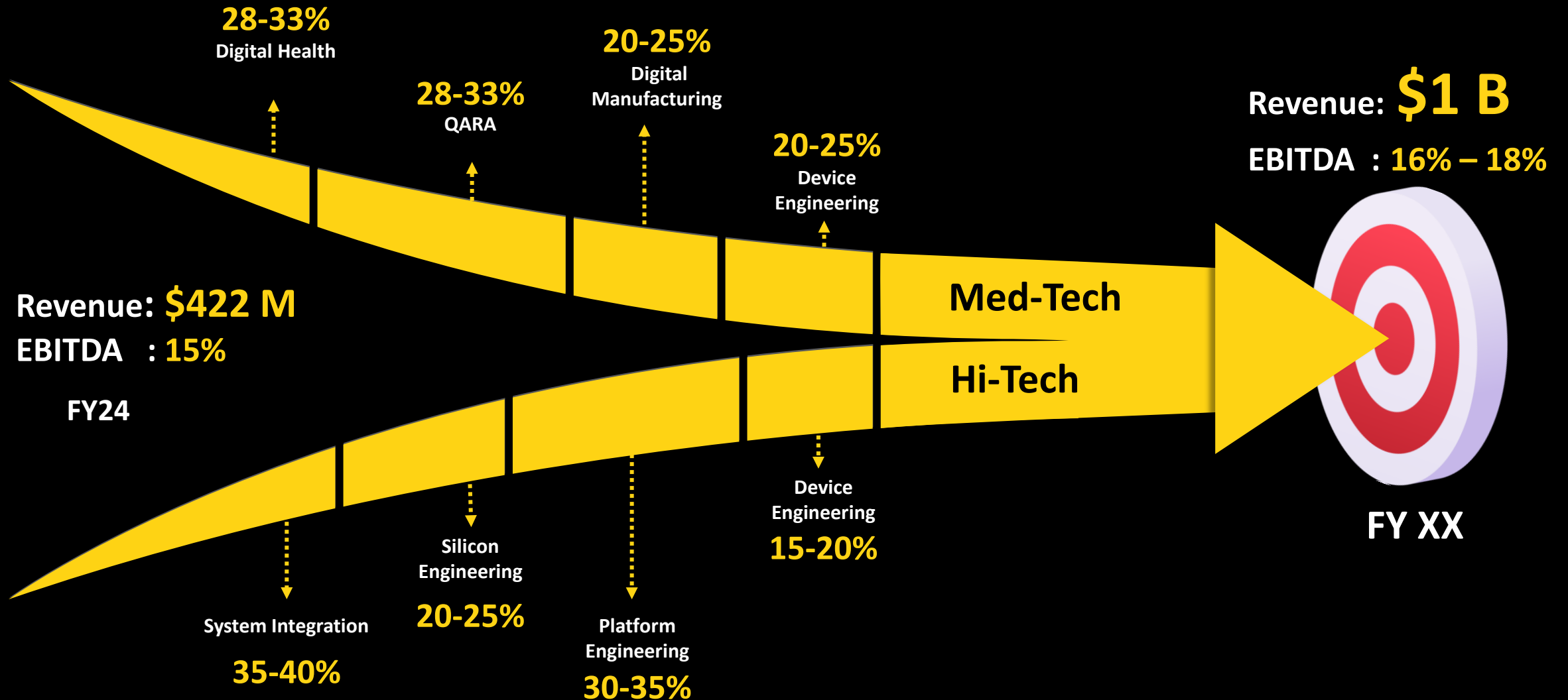


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L&T Technology Services inks deal with Intel for scaling edge-AI solutions



Tech: Marching Towards a Billion



Purposeful.
Agile.
Engineering.

Thank You