



Synergize & Simplify

#COMETOGETHER

Reimagining Business Processes

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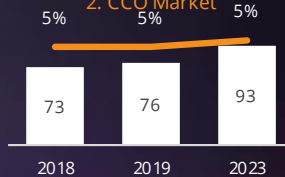


BPO market continues to expand...

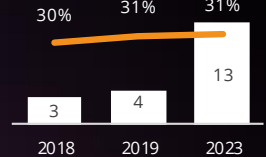
1. Overall Addressable Market



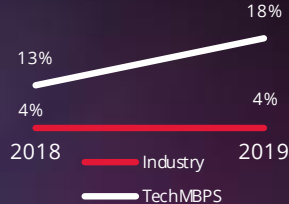
2. CCO Market



3. BPaaS Market



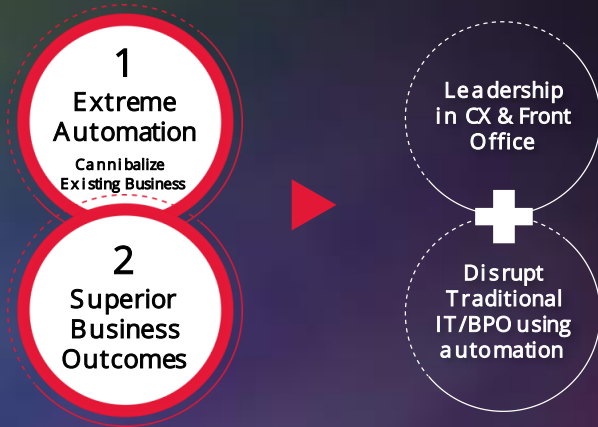
..and our expanding customer base is testimony to our growth.



YOY revenue growth

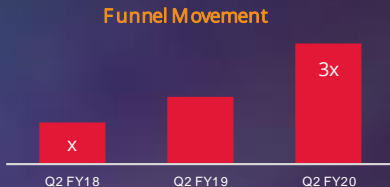
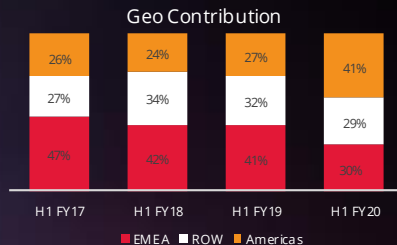
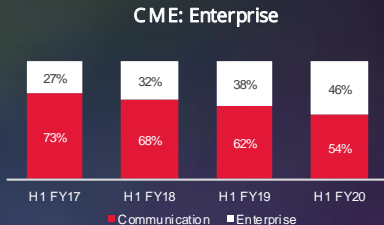
Source: Nelson Hall
Growth in US\$ terms

2 Design Principles driving customer efficacy & experience...



Do well by doing good to customers. Drive share-shift taking advantage of the technology shifts.

.. & driving a broadbased growth for #TechMBPS.



Funnel improved
3x in 2 years.

Non-linearity. Disrupting our own Business.

m.ai.a

Contact Center
agents of the future.

OFX

OneOffice
Transformation
Framework

SeeR

Advanced Analytics
Platform

BPaaS

Startup ecosystem
Alliances
Vertical & Horizontal
Solutions
Loan servicing,
Superannuation

Key Pillars of our Platforms Strategy

1

Monetize
& Scale existing
platforms

2

PIN

3

Build &
Co-Create
New IP

4

Synergize
with Portfolio
Companies

Operating Models

BPaaS

SaaS

PaaS

Products



Productized
Services

Commercial & Revenue Models

Outcome driven

Consumption based

Fixed Price

One time
Revenues



ARR

Key platform themes in focus.

CX &
Digital

AAA
AI,
Analytics, A
utomation

Emerging
Tech
Connected
World,
Blockchain,
5G

Vertical
Platforms
& Utilities

Cloud
Marketplace
PaaS

Our Platform Brands



Uno

GAiA

epselon

NewAgeDELIVERY

SURE

WARRANTEAZE

BLUE MARBLE

CareXa

CX transformation delivered

Leading
European telco
provider

15 + years
partnership

Preferred
partner of
choice

Industry
leading NPS
of 69 points



Winning
with TechM



Winners at
UK Digital
Business &
ECCS



20% +
operations
moved to chat

Handling
95% of total
call volume

2x customers
at 50% cost



Digital
Transformation

End to end
customer
lifecycle
management

Warranty Management as a Service

2nd largest
automaker in
US

Over \$3 billion
annual spend
on warranty
claims

50000+
customers &
10000+ dealers

Comprehensiv
e study of as-is
processes



Winning
with TechM



Implemented
WarrantEAZE
with rules-
engine-based
process
automation



400%
improvement
in execution
speeds

improved
transparency
in supply
chain

Fraud
reduction in
claims



Implemented
across US,
Europe &
Emerging
markets

Multi- million \$
savings a year

Platform based Superannuation

Leading wealth management firm in Australia

Legacy back office administration platform



Transforming Core Technology Platform



Winning with TechM



Pensions, Superannuation & Investment book of business on a single platform



30% reduction in Total Cost of Ownership

Regulatory compliance and future proofing of technology platform

Faster time to market



Reduced cost for system & platform changes

Administration services in a utility model on a new platform (BPaaS)

Growth momentum expected to continue.

1 Sales Execution

Digital Natives

Account mining &
creation potential

Brand value & top-
of-the-mind recall

2 Leadership in CX

Born

BIO

Mad*pow
Dynacommerce

3. Localization

Americas

Europe

Asia

4. M&A

Acquisition
strategy to
complement
capabilities.

5. BPaaS

Moving the dot
from transactional
to strategic

End to End Delivery
& Process
ownership

The logo for Analyst Day, featuring the letters 'AD' in a bold, sans-serif font. The 'A' is red and the 'D' is dark grey. Below the letters is a thin horizontal line, and underneath that, the words 'ANALYST DAY' are written in a smaller, dark grey, all-caps sans-serif font.

AD
ANALYST DAY

The Tech Mahindra logo, with 'Tech' in a dark grey sans-serif font and 'Mahindra' in a red sans-serif font. A vertical line is positioned to the left of the text.

Tech
Mahindra