



Synergize & Simplify

#COMETOGETHER

INTEGRATED ENGINEERING SERVICES

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Engineering Services Trends...

Speed & Skill with SCALE

Incremental - 2M estimated workforce demand in R&D by 2025

Engineering Services definition is changing...

PLM, IoT, MES, product & services integration

Technology Disruption

CASE, 5G, AI & sustainability*

Product & Service Disruption

Changing competition landscape

Servitization of CAPEX as a service

IP & product ownership

Innovation in business models

Customer co-invested business model to scale up

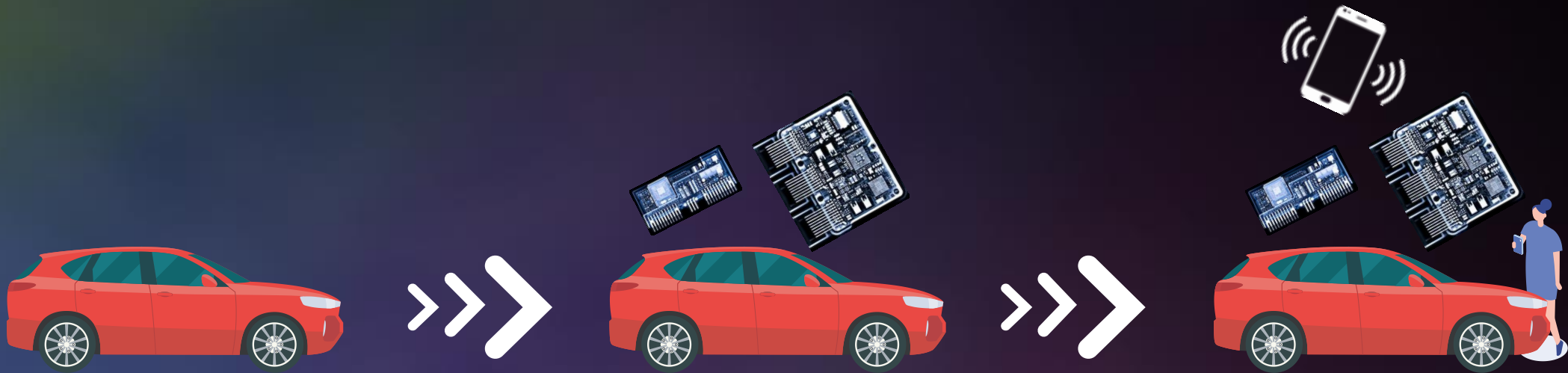
**CASE – Connected Autonomous Shared Electric*

Vertical Case : Automotive

Car

Smart Car

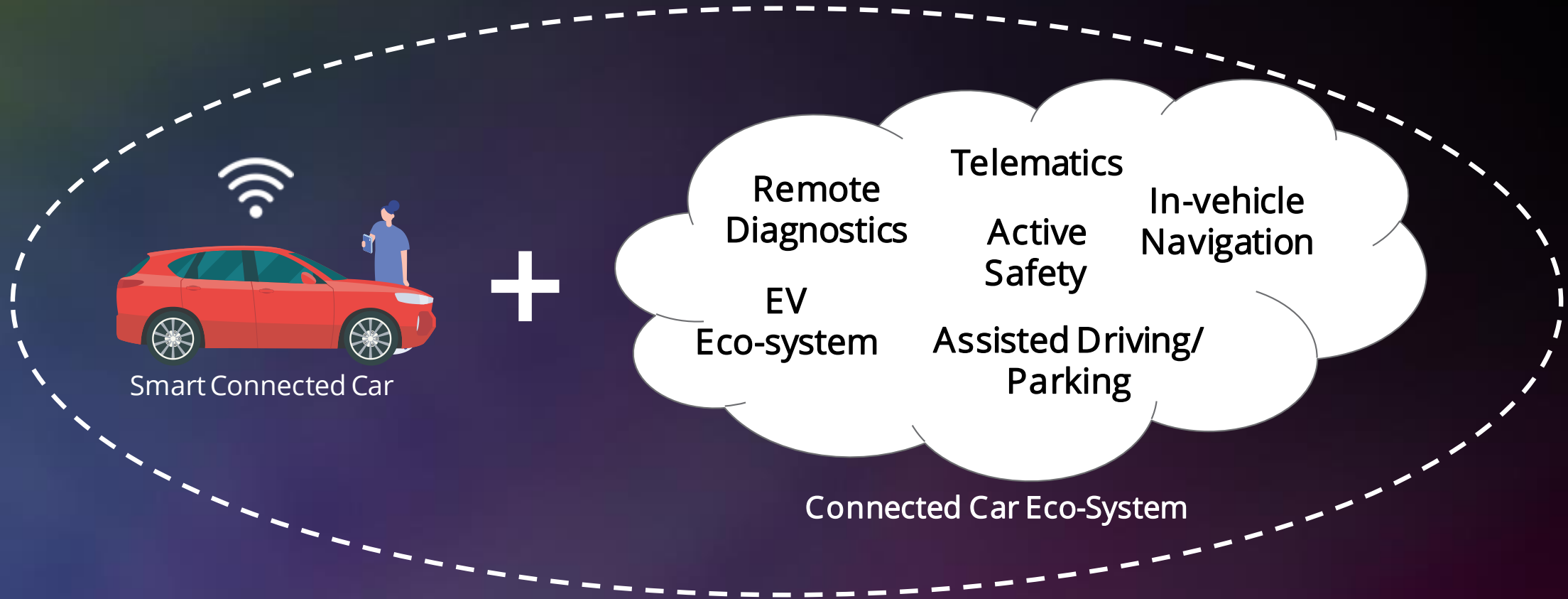
Smart Connected Car



Products to Intelligent Products

Vertical Case : Automotive

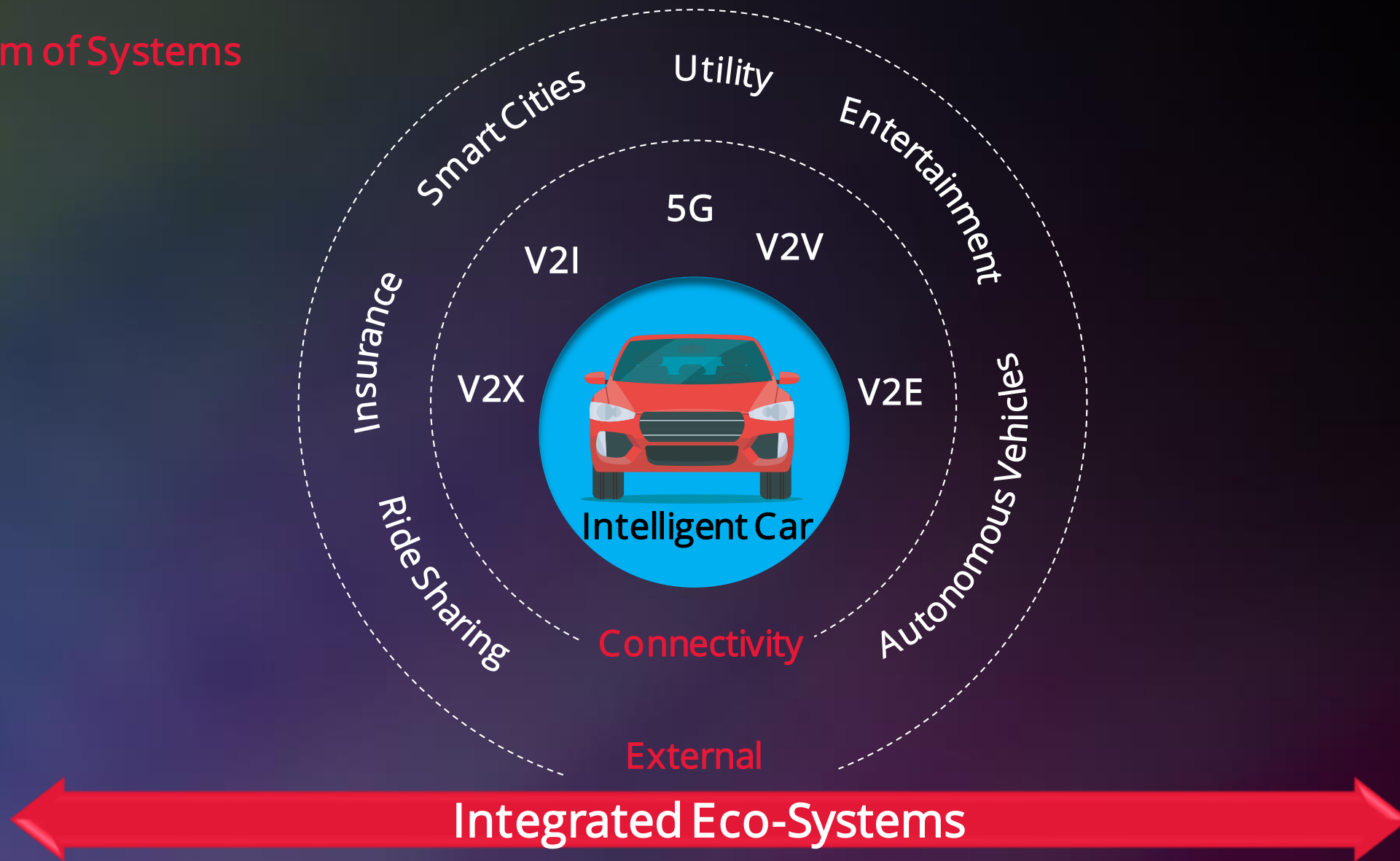
Smart Connected Car System Platform



← Intelligent Products to Platforms →

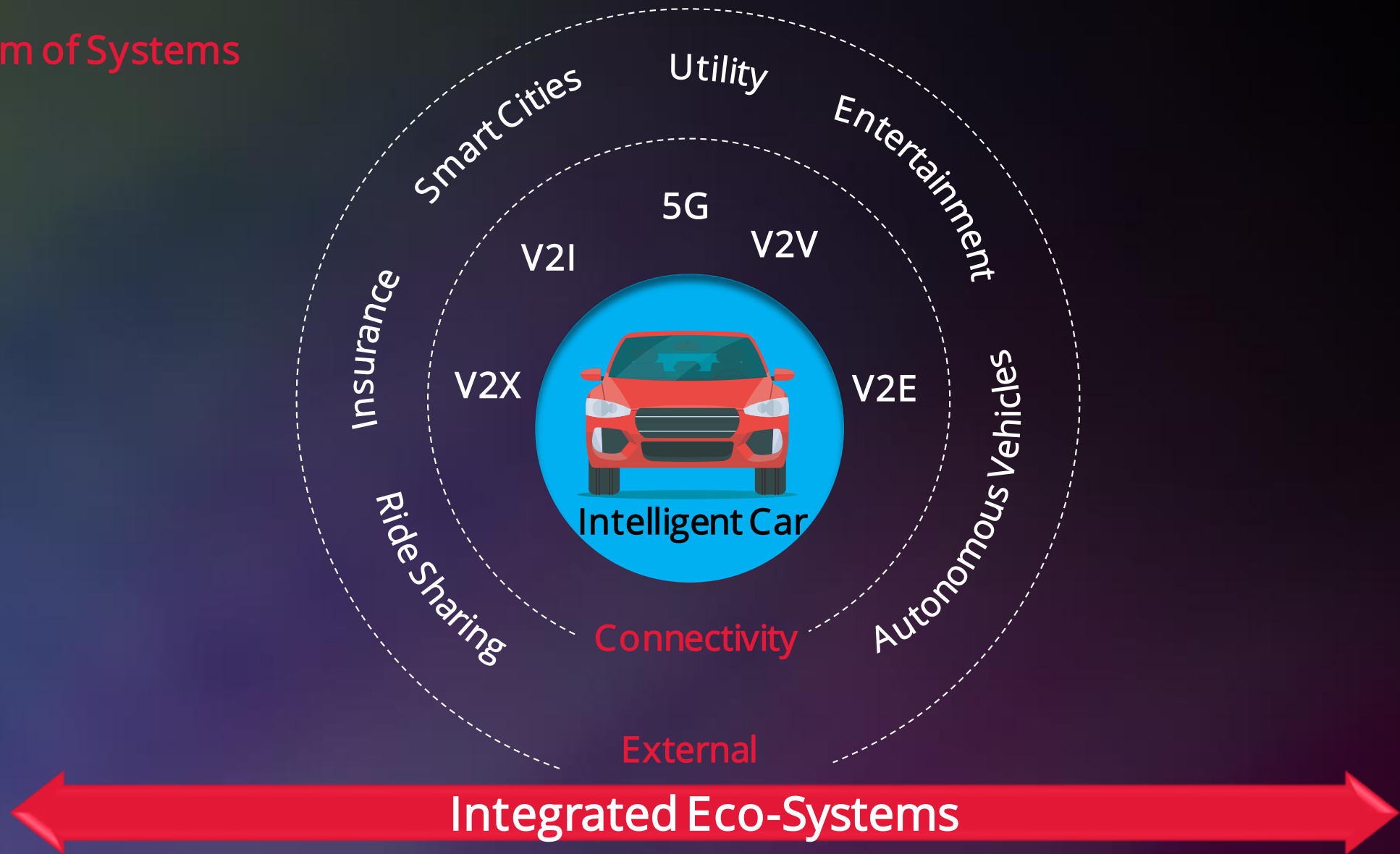
Vertical Case : Automotive

System of Systems



Software-Defined Innovation Enabling Service-Oriented Business Models...

System of Systems



Our Engineering Services Landscape

SERVICE LINES



Styling & Design



Mechanical Design



Embedded Software Engineering



Software Product & Platform Engineering



PLM, Mfg. Engg., Supply chain & MES



Digital Solutions (Industry 4.0, IoT, AI, AR/VR)



Engineering Consulting



pininfarina

DESIGN

World's Leading Global Brand



ENGINEERING

Among the Top 5 Core ESPs



DIGITAL & CONSULTING

Product & Services Transformation

**ACROSS
INDUSTRIES**



Automotive



A&D



Transportation



Telecom



Healthcare



ISV



Industrial

Unique Customer Experiences

Electric Vehicle Startup



E2E EV platform

Activities - Styling, Platform, Top hat, E/E integration, Testing and Certification

Large European Luxury OEM



Turnkey Prod. Dev. for 2 Derivatives

Activities - Architecture and Packaging studies, Vehicle engineering, Homologation & regulatory Requirements

Large Global OEM



A facelift for Asian Market launch

Activities- Styling Convergence, Homologation, E/E customization, Testing & Certification Support and SoP Support

Unique Customer Experiences

Cosmetics (Skincare)



Personalized Skincare

Developed sensors to measure Skin hydration & temperature for various skin types

Smart Health Beverage Dispenser



Designed Innovative Smart Dispenser

Sensor to analyze the sweat contents and dispense health drinks with right nutrients

New Gen Coffee Dispenser

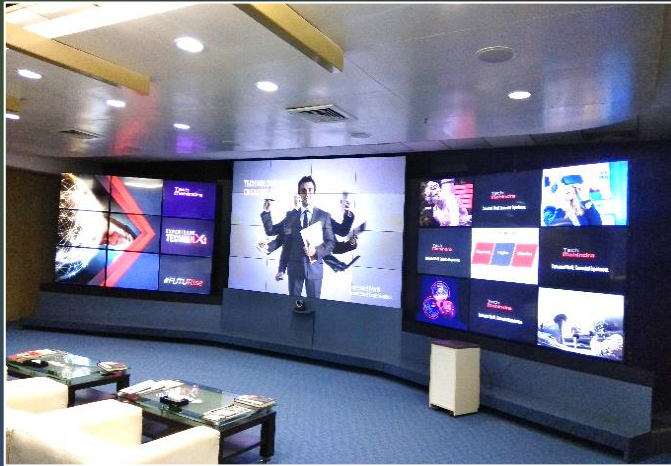


Designed Smart Coffee Dispenser

Interacts with users in a smart way to create ultimate experience of the coffee barista - HMI, AI & User Experience

Investments towards Innovation Enablers - Labs and CoEs...

Customer Experience Center



IOT / Factory of Future Lab



Smart City Lab



Wind Tunnel Test Lab



Automotive School of Excellence



Embedded S/W Engg. Lab





Aspiring to get into \$1B Engineering Club...

20%+
5-Year CAGR

23+ Years of Excellence	350+ Active Clients	13500+ Engineers	7 Services
	50+ Engineering ODCs	800+ Patents*	30+ Solutions

FY20 Overview

<p>Revenue FY20E \$700 Mn+</p> <table border="1"> <thead> <tr> <th>Revenue</th> <th># Customers</th> </tr> </thead> <tbody> <tr> <td>50M+</td> <td>2</td> </tr> <tr> <td>20M+</td> <td>5</td> </tr> <tr> <td>10M+</td> <td>10</td> </tr> </tbody> </table>	Revenue	# Customers	50M+	2	20M+	5	10M+	10	<p>TCV Deals Won \$500M</p> <p>TCV from 5G \$30M</p>	<p>Strategic Investments</p> 	<p>Analyst Recognition</p> 
Revenue	# Customers										
50M+	2										
20M+	5										
10M+	10										

"51 out of Global Top 100 ER&D spenders are our customers"

Key Strategic Priorities Moving Ahead...



Manufacturing

Product Engg., IoT, PLM, MES,
IP & Platforms, New Digital
Services Integration



Hi-Tech

Platform NxT, Product IP,
Enterprise SW, Platform &
Digital engineering



Communications

5G, SW product IP stacks,
Mobile, IoT devices,
ODM/OEM scale up

Helping Solve Key Customer Problems Through Design-Thinking Approach

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. The background features abstract geometric shapes in red and white, including a large white arrow pointing downwards and a red star-like shape in the top right corner.

Tech
Mahindra