

# CYIENT

## **BUILDING THE FUTURE:** Engineering an Intelligent Tomorrow



**Krishna Bodanapu**  
Executive Vice Chairman & Managing Director

**INVESTOR DAY 2023**  
ENGINEERING INTELLIGENT TOMORROW

8<sup>th</sup> December 2023,  
Hyderabad

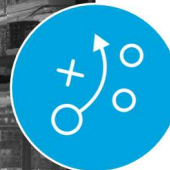


## AGENDA



**Intelligent Engineering:**  
Our Position and Purpose

---



**Intelligent Engineering:**  
Our Culture, Strategy and People

---



**Intelligent Engineering:**  
Our right to win



# INTELLIGENT ENGINEERING EVOLUTION: CAR FUEL INDICATOR

# INTELLIGENT ENGINEERING EVOLUTION: CAR FUEL INDICATOR



**MECHANICAL**



**ELECTRICAL**



**ELECTRONIC**



**DIGITAL**



**INTELLIGENT**

**POSITIONED TO DELIVER  
INTELLIGENT ENGINEERING &  
TECHNOLOGY SOLUTIONS**

# DELIVERING INTELLIGENT ENGINEERING & TECHNOLOGY SOLUTIONS

core  
to  
CYIENT

products, process,  
plant, network

For

including, services,  
products, platforms



Digital



Autonomous



Sustainable

FUTURE



# INTELLIGENT ENGINEERING FOR **DIGITAL FUTURE**



Implemented **GenAI** solution for Honeywell to reduce technical queries by 40% and to provide real-time insights in the near term.

**Honeywell**

# INTELLIGENT ENGINEERING FOR **AUTONOMOUS FUTURE**



Engineered perception system  
for CNH's existing off-highway  
vehicle for **safe and reliable**  
Autonomous operations



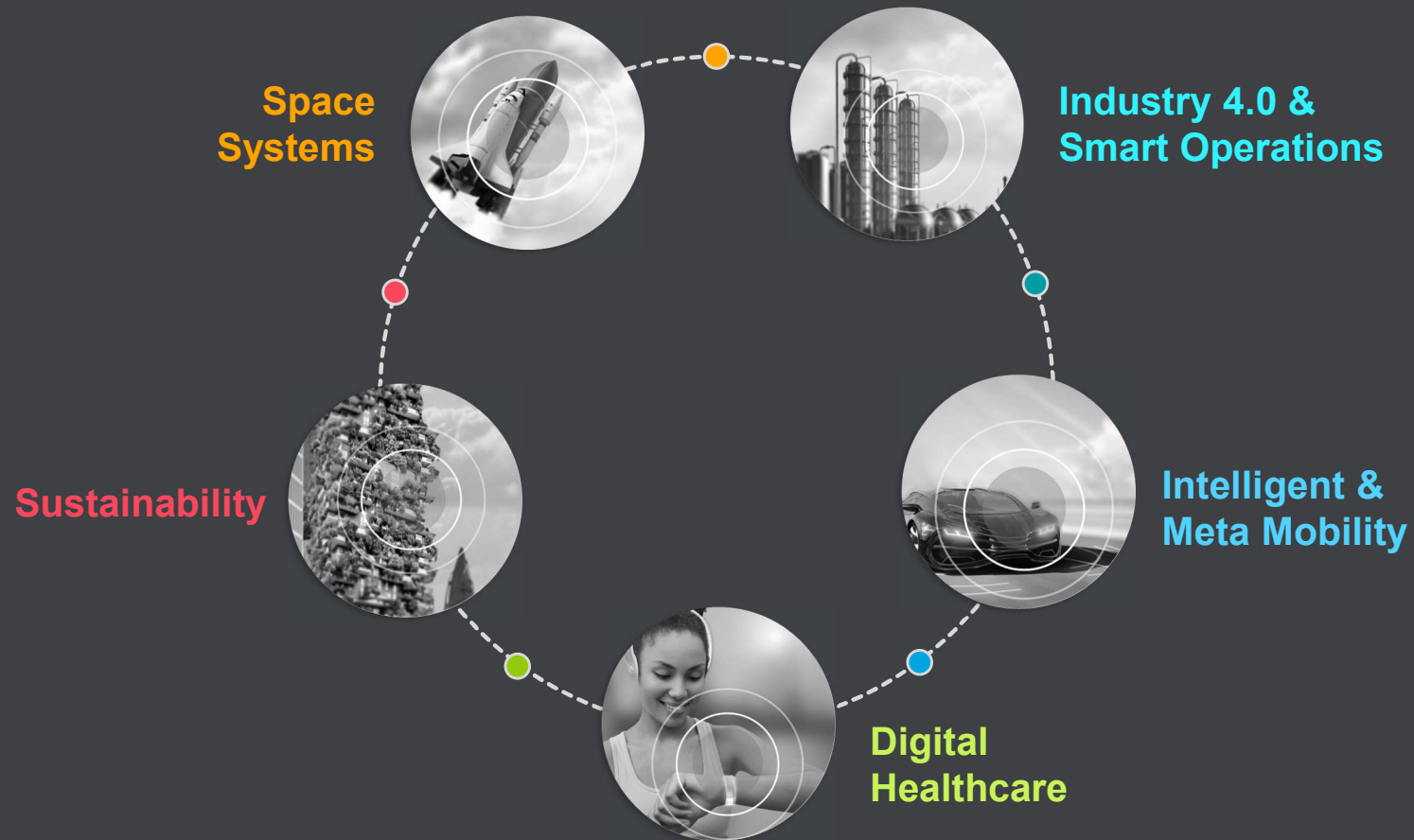
# INTELLIGENT ENGINEERING FOR **SUSTAINABLE FUTURE**



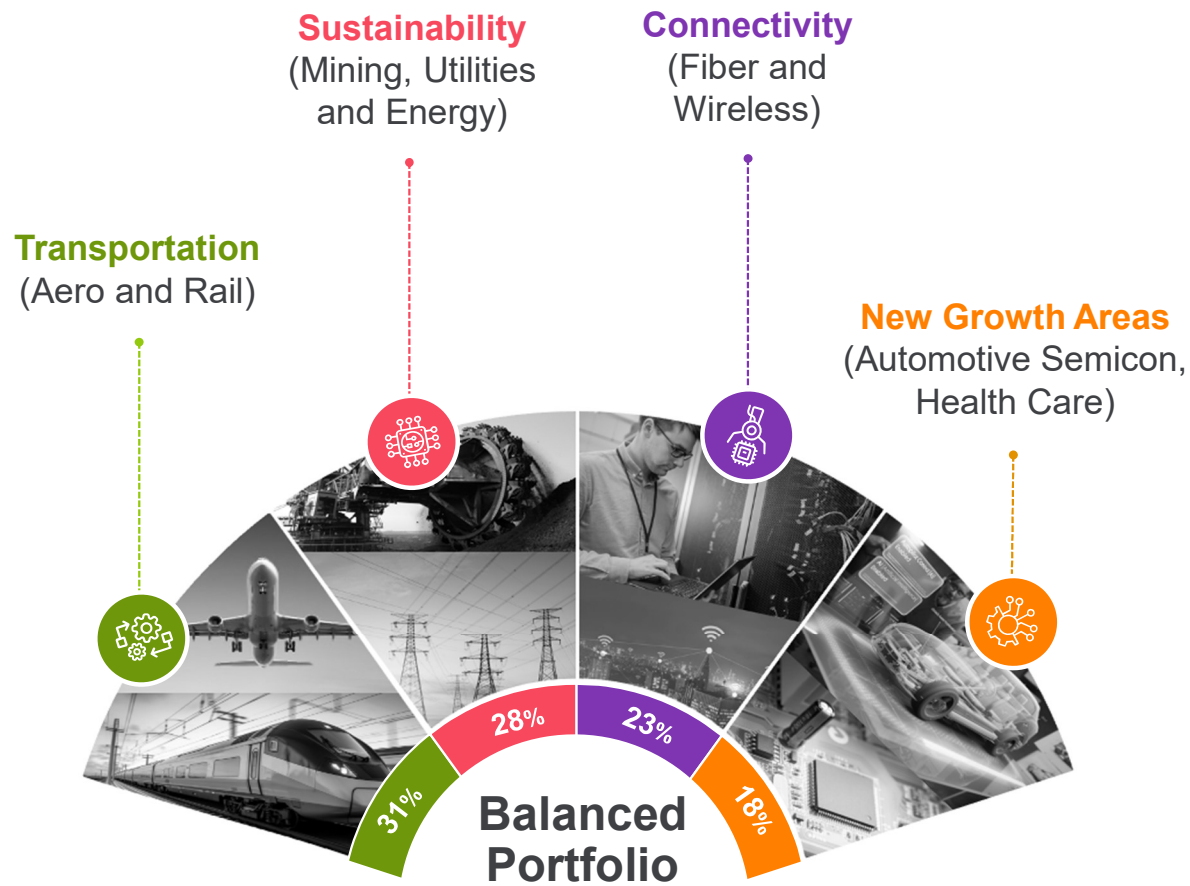
Cyient partnered with Fortum Oslo Varme (FOV) to evaluate and integrate carbon capture technology suppliers with their existing plant, as part of Oslo's **Net Zero 2030 mission**.

# **BALANCED PORTFOLIO BASED STRATEGY BUILT ON MEGATRENDS**

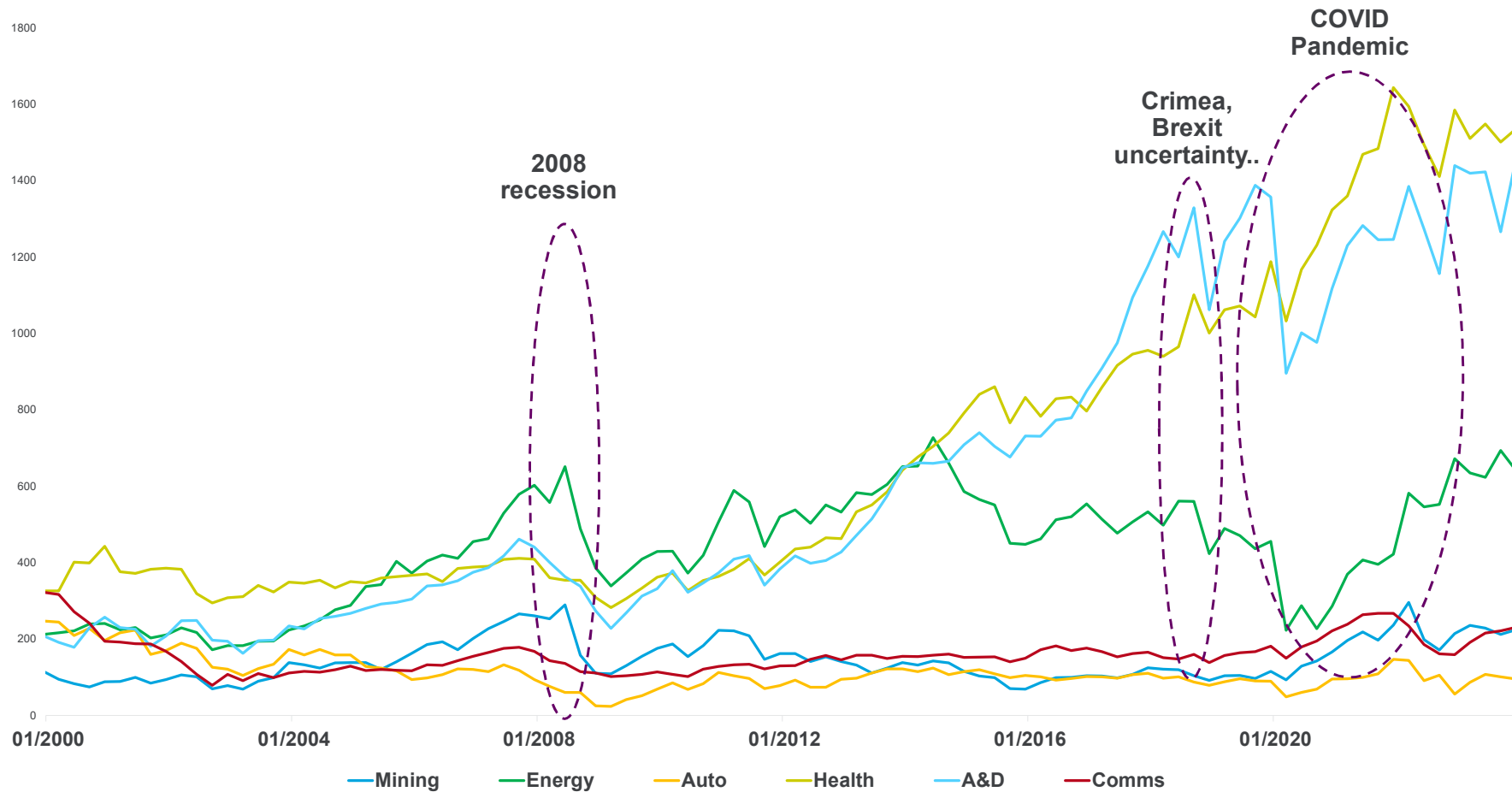
# THE MEGATRENDS ALIGNED TO OUR STRATEGY



# BALANCED PORTFOLIO



# S&P 500 INDEX PERFORMANCE ACROSS OUR OPERATING INDUSTRIES – PAST 20+ YEARS





# OUR DIFFERENTIATION



**GROWING A  
BALANCED  
PORTFOLIO OF  
INDUSTRIES BUILT  
ON MEGATRENDS**



**STRONG PLAY AT  
THE CONVERGENCE  
OF ENGINEERING,  
TECHNOLOGY,  
AND AI**



**STRATEGIC FOCUS  
ON SUSTAINABILITY  
AS AN INDUSTRY/  
OFFERING/ WAY OF  
DOING BUSINESS**



**MAXIMIZING  
SHAREHOLDER  
VALUE CREATION  
THROUGH NON-  
LINEAR GROWTH/  
EXPANSION &  
PORTFOLIO  
OPTIMIZATION**



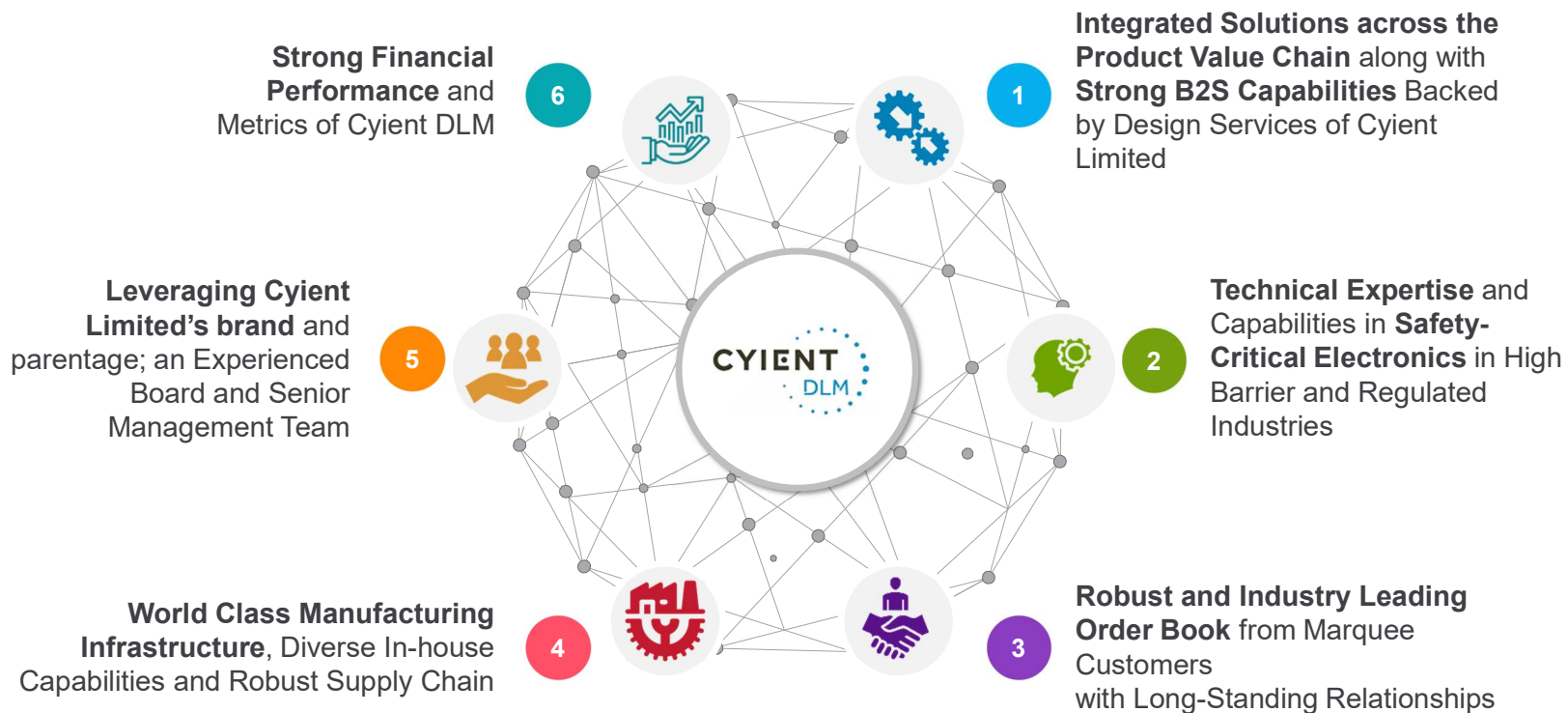
**LEVERAGING OUR  
WORLD-CLASS  
MANUFACTURING  
CAPABILITIES**

# THE DIVESTMENT OF CYIENT DLM



# THE DIVESTMENT OF CYIENT DLM PROVIDES EXCITING OPPORTUNITY FOR GROWTH

Over 22 Years of Experience in Developing High Mix, Low-to-Medium Volume Highly Complex Systems



# MULTIPLE TRENDS ARE SHAPING THE GLOBAL EMS MARKET OUTLOOK

01

**Emerging technologies** like IoT, 5G, Industry 4.0, AI, etc. are leading to increased electronification of products across industries

02

**China Plus 1 Strategy** and increasing focus on de-risking supply chain leading to the development of alternate locations for manufacturing outside of China

03

Indian governmental push on manufacturing through the **Production Linked Incentive (PLI) policy** is creating opportunity of Indian EMS players to capture Global and Indian markets

04

**Global chip shortage** is leading to **demand for redesigning products to rapidly and effectively mitigate supply chain shocks**, creating opportunity for re-engineering with focus on Design for Resilience and Design for Availability

05

**Disruption in the semicon value chain** and geopolitical situation leading to new opportunities like Outsourced Semiconductor Assembly and Test (OSAT)

**Global EMS** market expected to grow **5.4% CAGR – from \$880B to \$1.15T by 2026**

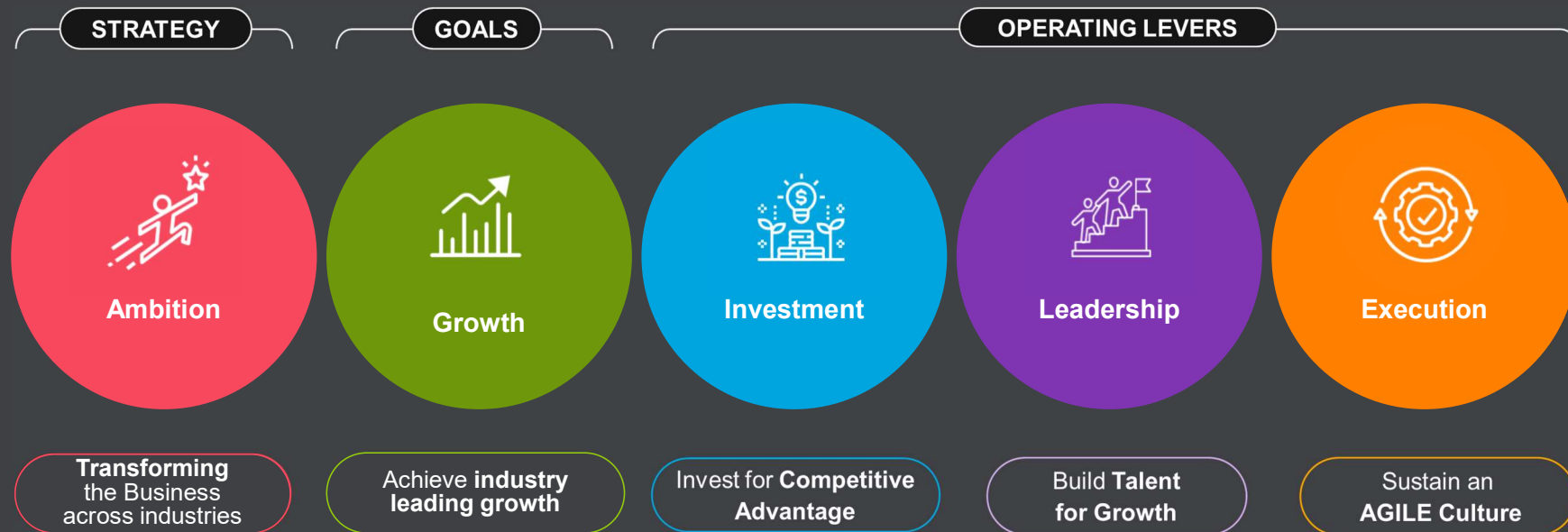
**India EMS** market expected to grow **29.3% CAGR** i.e., from **\$16B to \$58B by 2026**

**Unique opportunity for players like Cyient to carve out a niche in high mix-low volume segment**

**ENABLING THE NEXT GENERATION:  
OUR CULTURE, OUR COMMUNITY,  
OUR WORLD.**



# AGILE FRAMEWORK REMAINS TO DEFINE THE STRATEGY & OPERATING LEVERS TO ACHIEVE OUR GROWTH OBJECTIVES



OUR **AGILE CULTURE** ENABLES  
US TO APPLY IMAGINATION TO  
PROBLEMS THAT MATTER

**AGILE**  
C U L T U R E

Our Culture, Your Journey.



**AMBITION**



**GROWTH  
MINDSET**



**INCLUSIVE**



**LEADERSHIP**

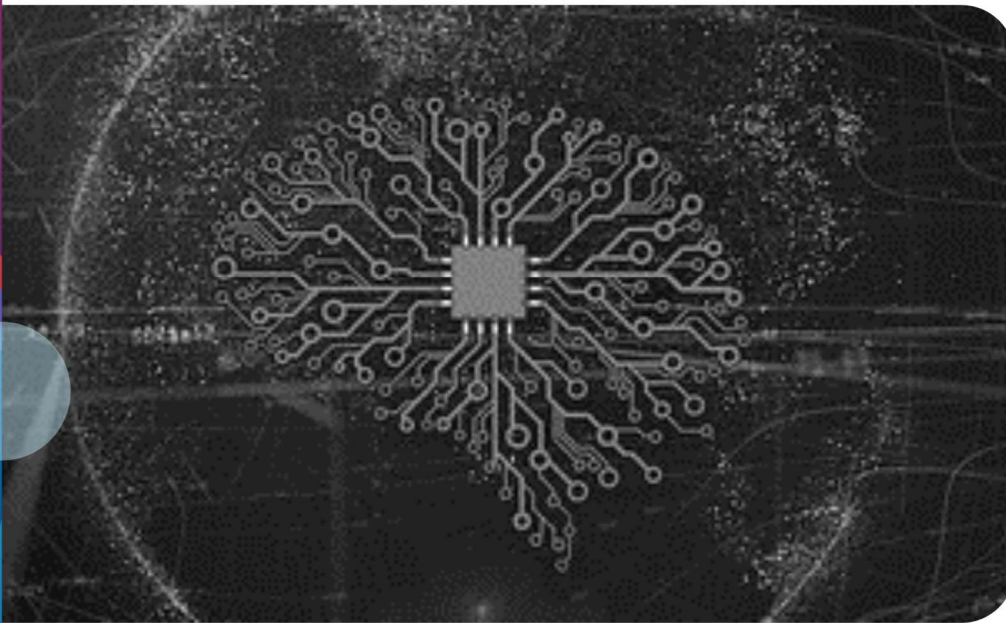


**EMPOWERMENT**

WE ARE A  
**GREAT PLACE TO WORK**  
#ProudToBeACyientist



# BUILDING OUR NEXT GEN WORKFORCE



- Completed **1.5Mn+** hours in learning and development in past 12 months.
- Dedicated programs focused on reskilling our associates in next generation tech and emerging capabilities.
- Building future ready leadership through world class training and mentoring programs.

# IN TODAY'S RAPIDLY CHANGING GLOBAL LANDSCAPE, SUSTAINABILITY IS NO LONGER A CHOICE BUT A NECESSITY



- Our sustainability framework ensures that we are accountable, equitable and responsible.
- We have increased the share of renewable energy across our India-based facilities – incl. EV charging stations.
- Delivered global diversity development and mentoring programs for our future female leaders.

## WE REMAIN COMMITTED TO OUR CORPORATE SOCIAL RESPONSIBILITY



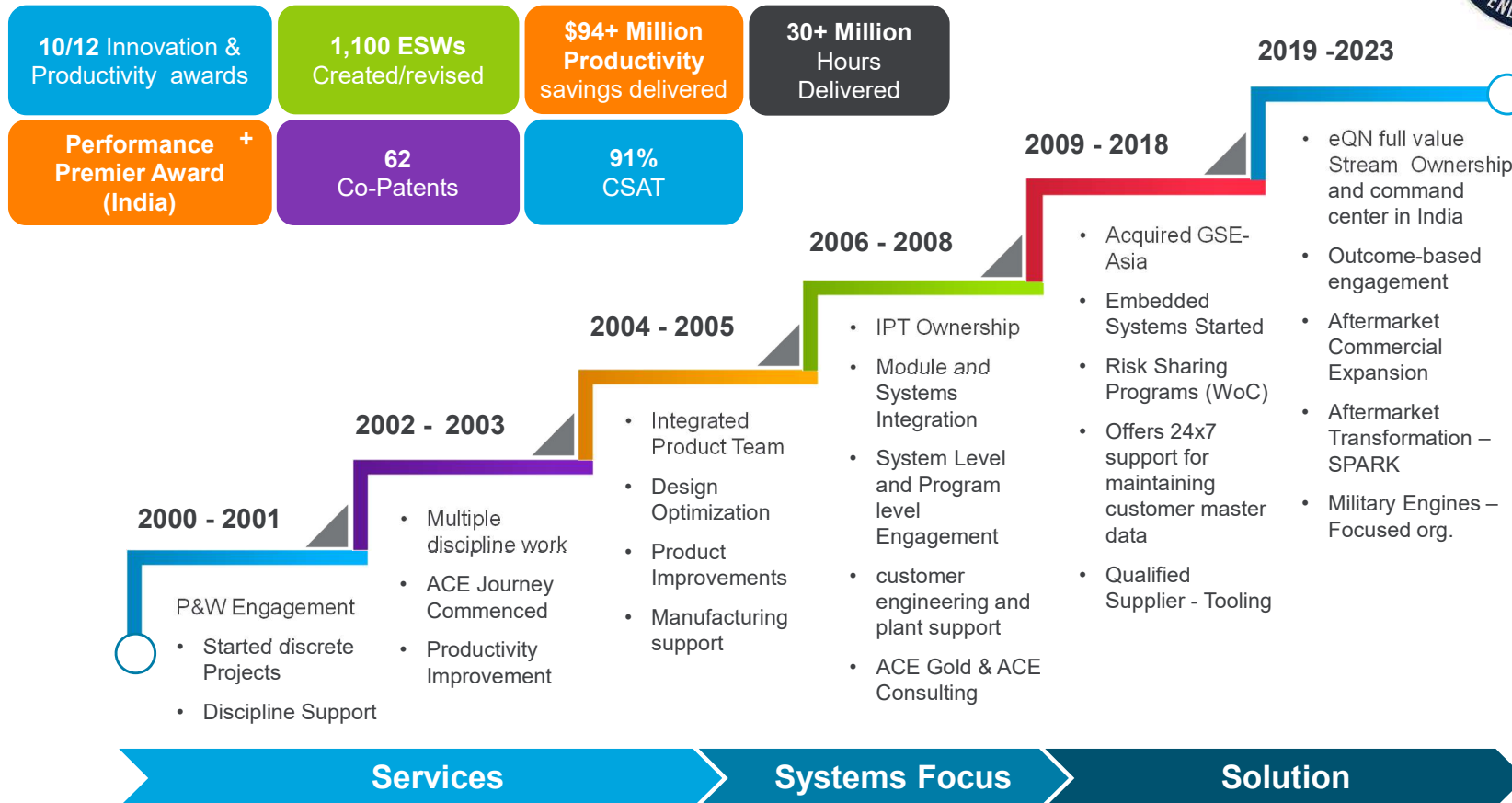
- Provided quality education to 20,000+ underprivileged children through our 30 adopted schools in India.
- Trained 4,000+ unemployed women through our urban & rural micro skills centers
- Launched the School of Innovation and Entrepreneurship (BVR SCIENT) on the IIT-Hyderabad campus.



# DESIGNING TOMORROW TOGETHER: CUSTOMER STORIES



# OUR JOURNEY WITH PRATT & WHITNEY



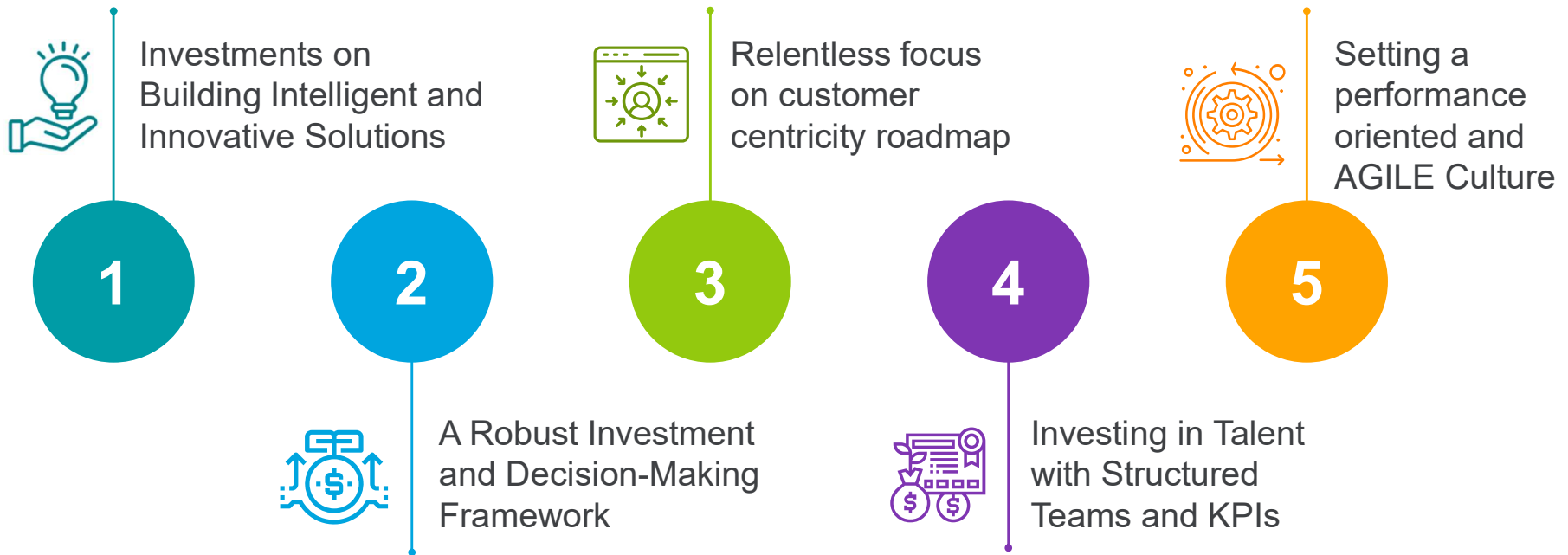


**Dairy for life**



**CYIENT INTELLIGENT ENGINEERING:  
OUR RIGHT TO WIN.**

# OUR CONFIDENCE TO EXECUTE IS WHAT DRIVES US





# DESIGNING TOMORROW TOGETHER