



Design Digital Investor Conference '22

Aug 24, 2022

Design Digital Investor Conference '22

Date: 24 Aug 2022

Location: Bangalore

Agenda

- Opening Session

Manoj Raghavan
CEO & Managing Director

- Leading with Design

Nick Talbot
Global Head - Design & Innovation

- Transportation

Shaju S
Vice President - TBU

- Media & Communications

KP Sreekumar
Vice President & Head,
Media & Communications

- Healthcare & Life Sciences

Suhas Tamras
VP & Head, Healthcare and Life Sciences

- Growth Strategies

Nitin Pai
CMO & Chief Strategy Officer

- Q&A

The background of the slide features a dark blue gradient with abstract, glowing blue line art. This art includes several jagged lines, some solid and some dashed, that generally trend upwards from left to right. There are also vertical bars of varying heights, resembling a bar chart, and several small circles connected by lines, suggesting data points or nodes in a network. The overall aesthetic is modern and tech-oriented.

TATA ELXSI

Driving Sustainable and Profitable Growth

Manoj Raghavan
MD & CEO

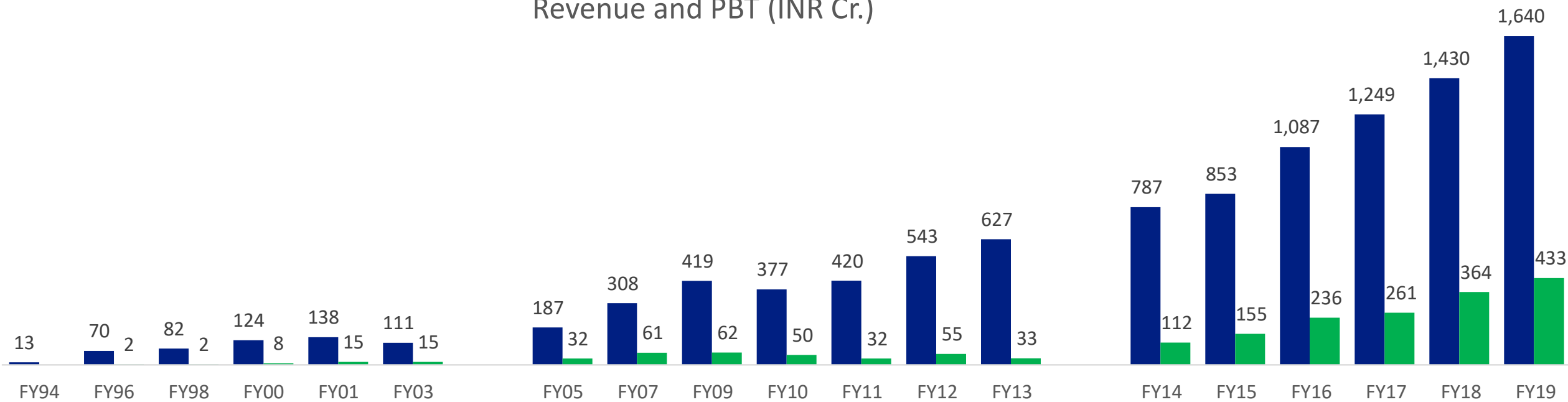
Disclaimer

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Our Journey

Revenue and PBT (INR Cr.)



Gen 1: SI + ER&D

- 1991 – Mini Supercomputer Mfg. and R&D
- Started System Integration(SIS)
- 1996 – Pivoted R&D team to ER&D
- Top line growth primarily driven by SIS

Gen 2: ER&D + SI + Design + Content

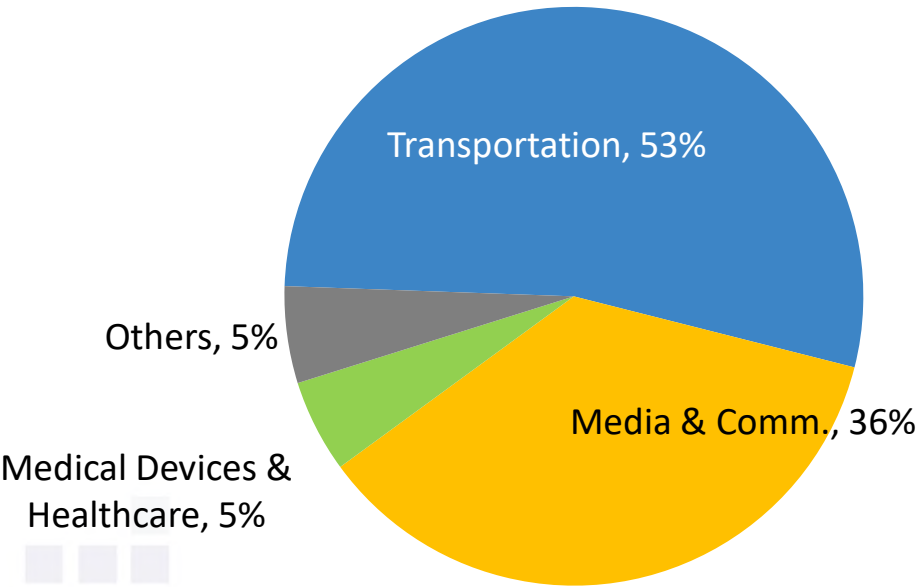
- Initiated ID (Industrial Design) business
- Initiated VCL for Visualization and Animation business
- Top line grew at 11%
- Design + Visualization + ER&D grew at 12%

Gen 3: ER&D + Design

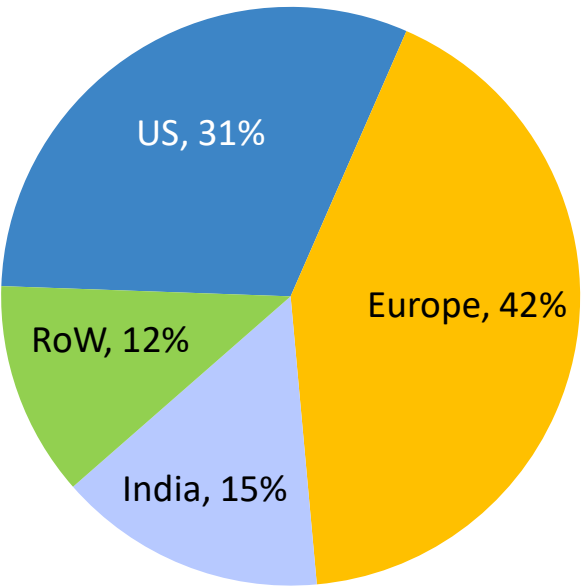
- VCL merged with Design
- Leadership in Auto and Media & Communication
- Initiated Medical Electronics entry
- Top line grew at 14% and bottom-line by 30%

As we stood in April 2019

Revenue by Industry Vertical, Q4FY19



Revenue by Geo, Q4FY19



As we stood in April 2019

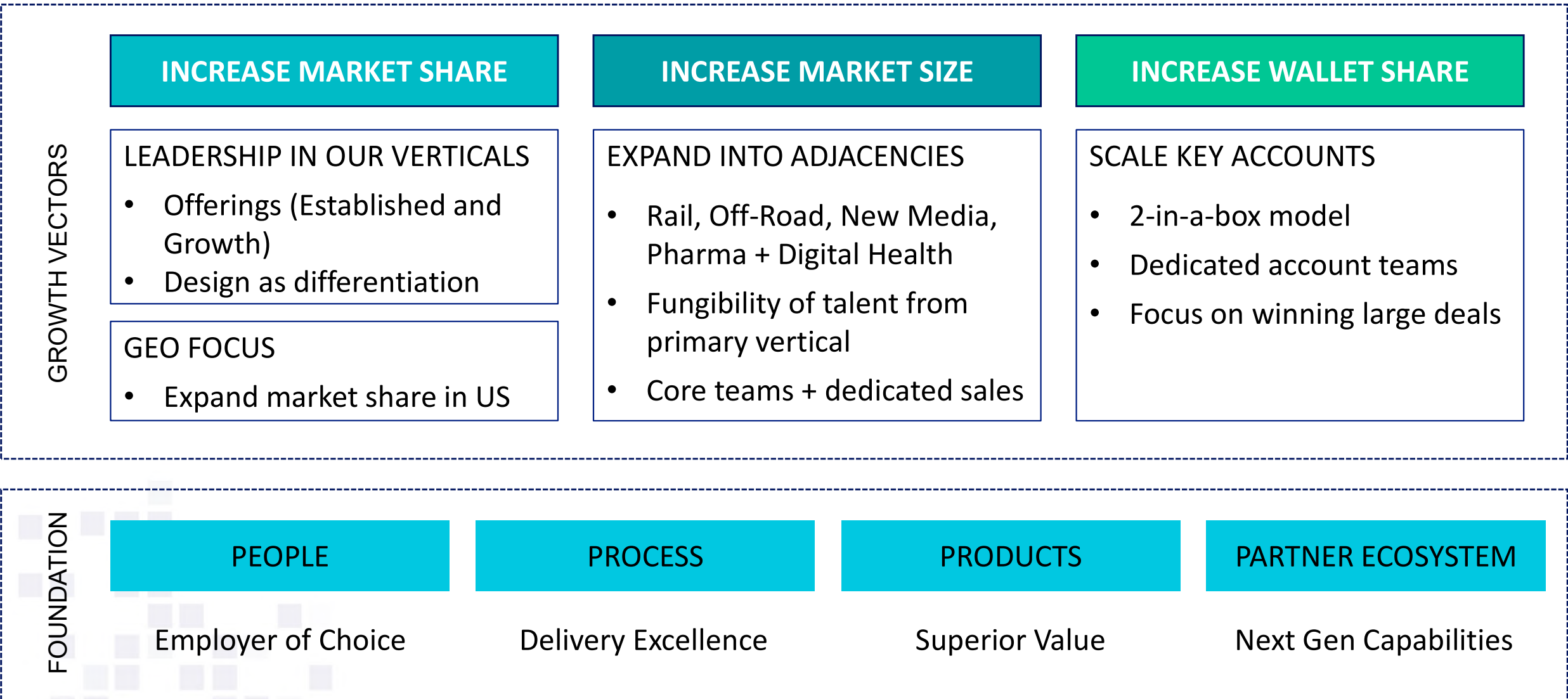
Strategic Opportunities

- Established presence in the two largest R&D verticals – Automotive and Media+Telecom
- Growth in ER&D outsourcing especially in digital, software and electronics – our forte
- Potential to accelerate Medical Device business
- Great set of existing customer logos to grow
- US market under-served – just around 30% of overall revenues

Strategic Risks

- Cyclic trends in our chosen industries
- Brexit uncertainties in Europe, especially UK which represents significant revenues
- Protectionist policies in US, especially for outsourcing and visas
- Currency risks
- Large dependency on No.1 customer - constituted 22%+ of total revenue in previous year

Tata Elxsi – Strategic Growth Vectors



INCREASE MARKET SHARE

Leverage deep expertise in the three verticals

Leverage design capabilities to differentiate

Invest in growth areas:

- Automotive: EV, Connected Car
- Broadcast & Communications: OTT, Network Transformation
- Healthcare: Regulatory Intelligence

Transform Geo Sales to a Verticalized structure

Hunting & Farming

Strengthen presence in the US

INCREASE MARKET SIZE



INDUSTRY VERTICALS



ADJACENCIES



Rail, Offroad

- Smaller but less volatile markets
- Benefit from government spending during macro-economic slowdowns

Media, New Media

- Rise of D2C and a new generation of media technologies including AdTech

Pharma, Digital Health

- Leverage device capabilities for pharma - drug delivery systems, regulatory...
- Digital health platforms relevant to both device and pharma; entry into provider market

INCREASE WALLET SHARE

- Cull customer base for growth and moving up the revenue bucket pyramid
- Key Account Management – Focus on accounts with growth potential
- Investing in 2-in-a-box model – ‘Delivery + Sales’
- Advanced consultative sales training for entire sales force
- Focus on large deals and annuity business

Long-term Goals

GEOGRAPHY

40%

US

40%

Europe

20%

Rest of World

CAPTURING THE OPPORTUNITY IN US
HEDGE AGAINST CURRENCY FLUCTUATIONS

VERTICALS

40%

Transportation

40%

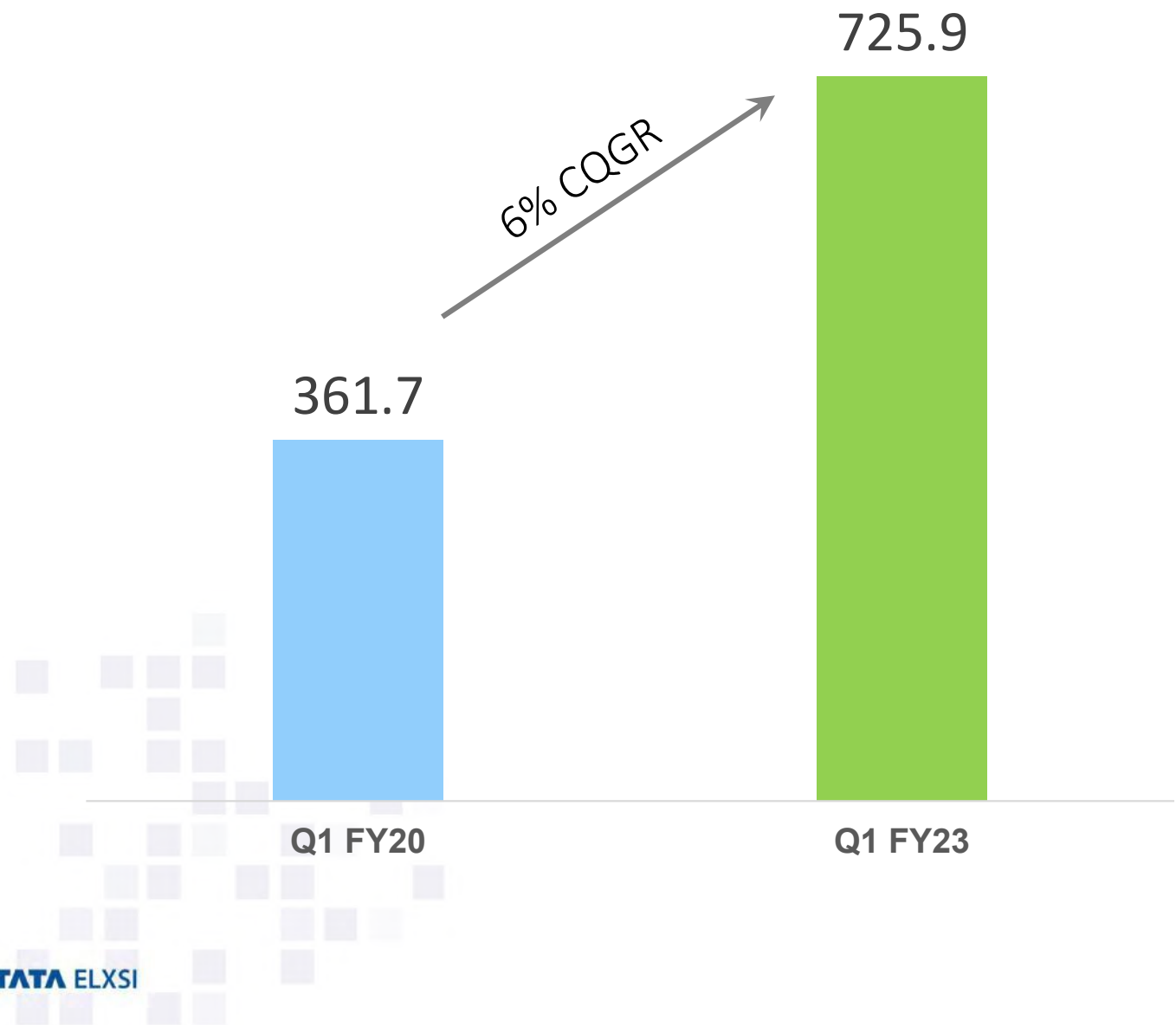
Media & Comm.

20%

Healthcare

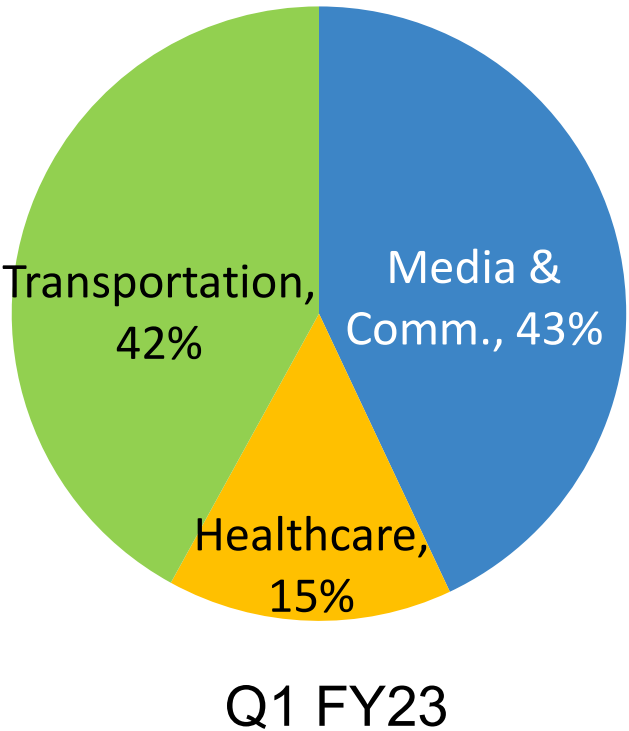
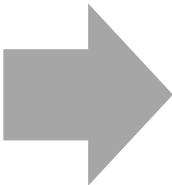
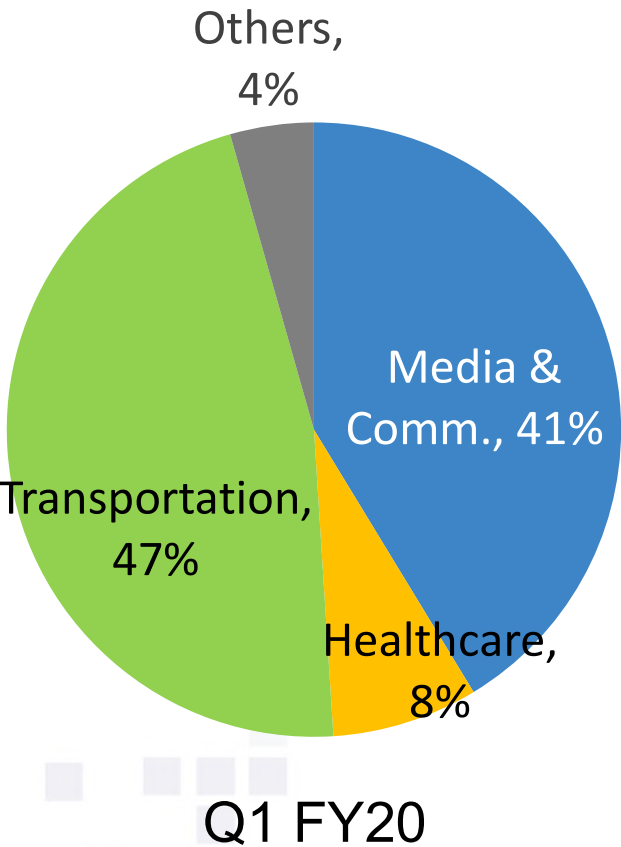
LEADERSHIP IN CHOSEN VERTICALS
SHARE OF REVENUE FROM ADJACENCY – 20%

Top-line performance through the pandemic and beyond



2X growth
in 12 quarters

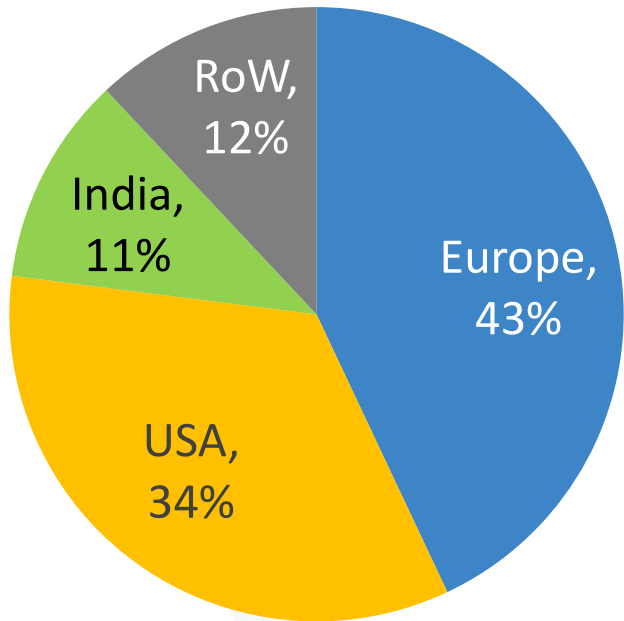
Balanced growth in our 3 chosen verticals



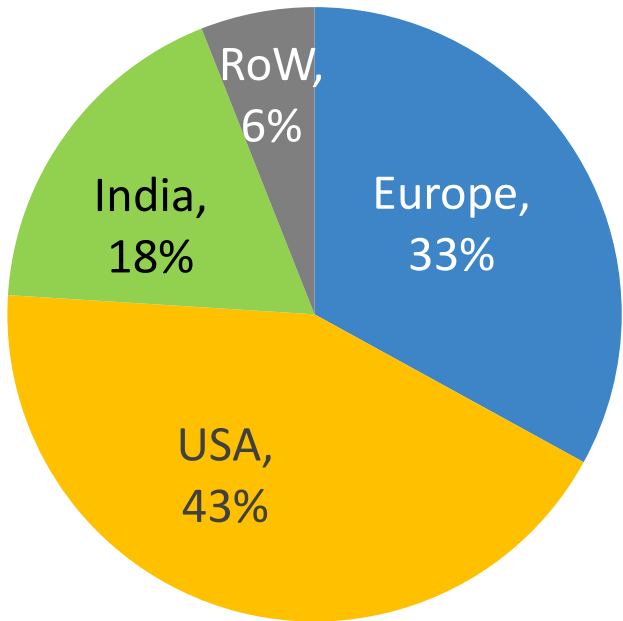
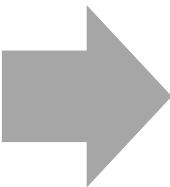
12 Quarters CQGR

Media & Comm.	6.3%
Transportation	4.8%
Healthcare	10.4%

Geo strategy on track – US ahead of plan



Q1 FY20



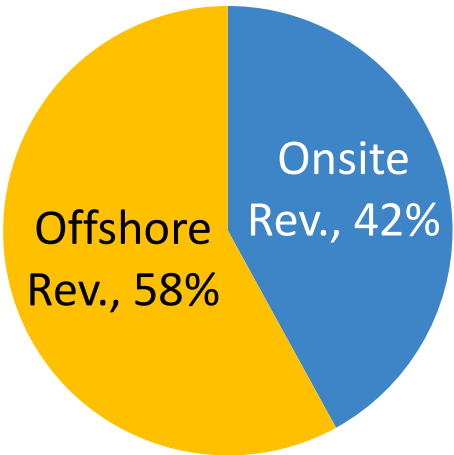
Q1 FY23

12 Quarters CQGR

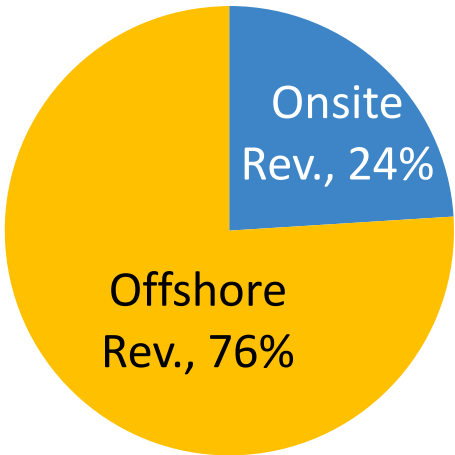
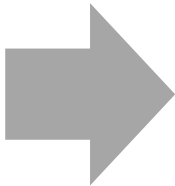
USA	7.9%
EU	3.7%
India	10.2%

Delivering on operating levers

Delivery Location

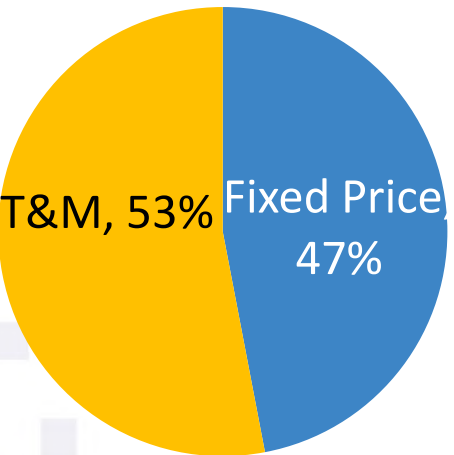


Q1 FY20

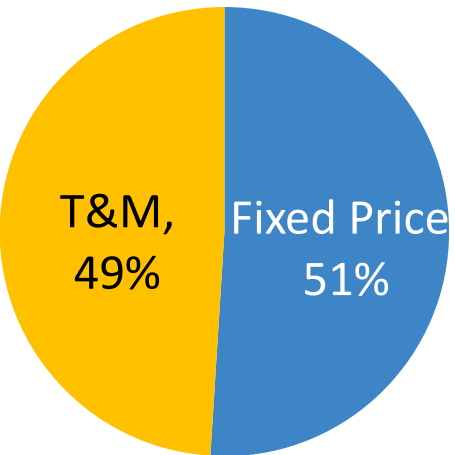
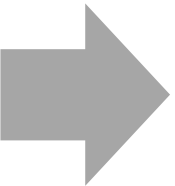


Q1 FY23

Engagement Type



Q1 FY20



Q1 FY23

Our Proposition

3D

Design

Design-led engineering
CXO conversations
Early project visibility

Domain

Transportation
Media & Comms
Healthcare & Lifesciences

Digital

IoT
Cloud
AI and Analytics
AR/VR

FOUNDATION

PEOPLE

Employer of Choice

PROCESS

Delivery Excellence

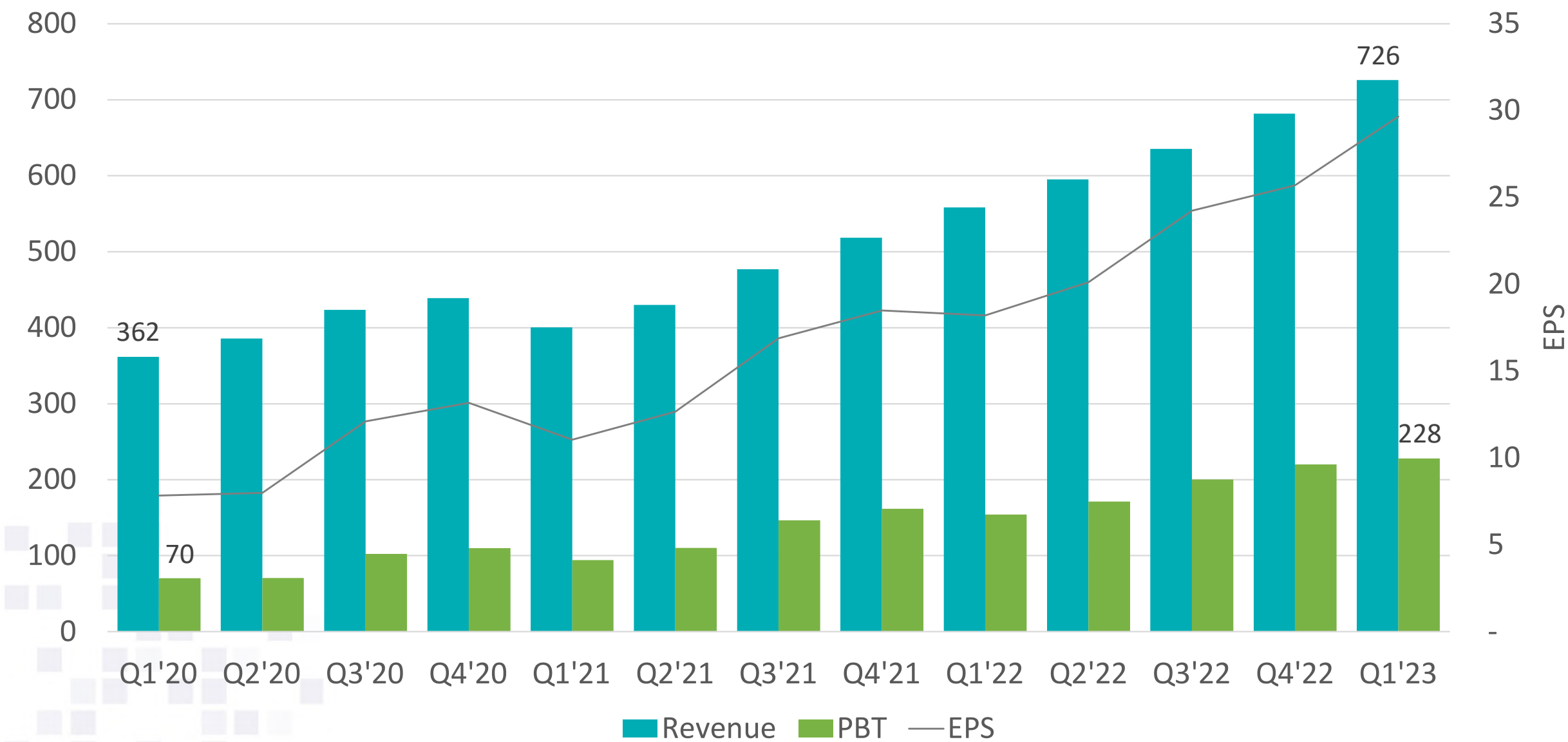
PRODUCTS

Superior Value

PARTNER ECOSYSTEM

Next Gen Capabilities

Delivering on top line and bottom line performance





Thank You



Leading with Design

Nick Talbot – Global Head of Design & Innovation

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Design Digital - What

Deploying Design thinking, processes and philosophies to create future digital solutions with multiple applications

Insight, imagination and creativity is one of our key differentiators

Design is focussed on delivering amazing customer experiences, whilst mediating technology challenges, constraints and costs

This drives strategic, higher value engagements helping deliver a vision of future products, services and overall business direction

Design Digital - How – Our Formula for creating 'Digital Magic'

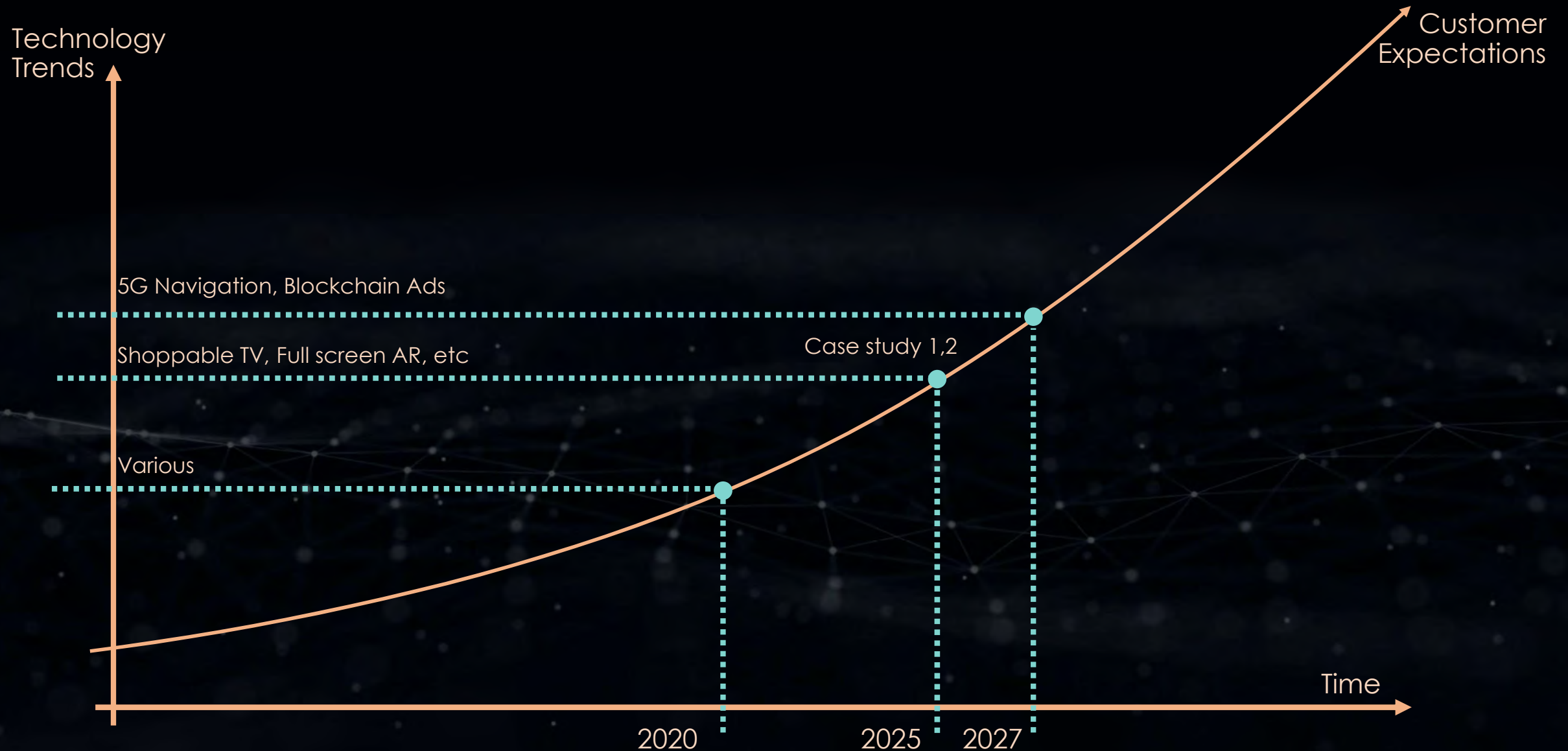
Business Excellence through Human centric design solutions

$$C(x) = f \{ d(Tx) + d(Dx) \} = B(x)$$

Consumer Experience *Technology Execution* *Design Expertise* *Business Excellence*

Design Digital - Where

Imagining the future of digital



We Work at the intersection of Future Technology and Consumer Behaviour

Design Digital – Production OTT Broadcast Interface



Welcome, Rahul Kumar



09:27

Home

TV Channels

Originals

Apps & Games

Kids

Settings



Last Chance to Watch



Wonder Woman



Twilight



Inception



Smurfs



Lord of the Rings



The Conjuring

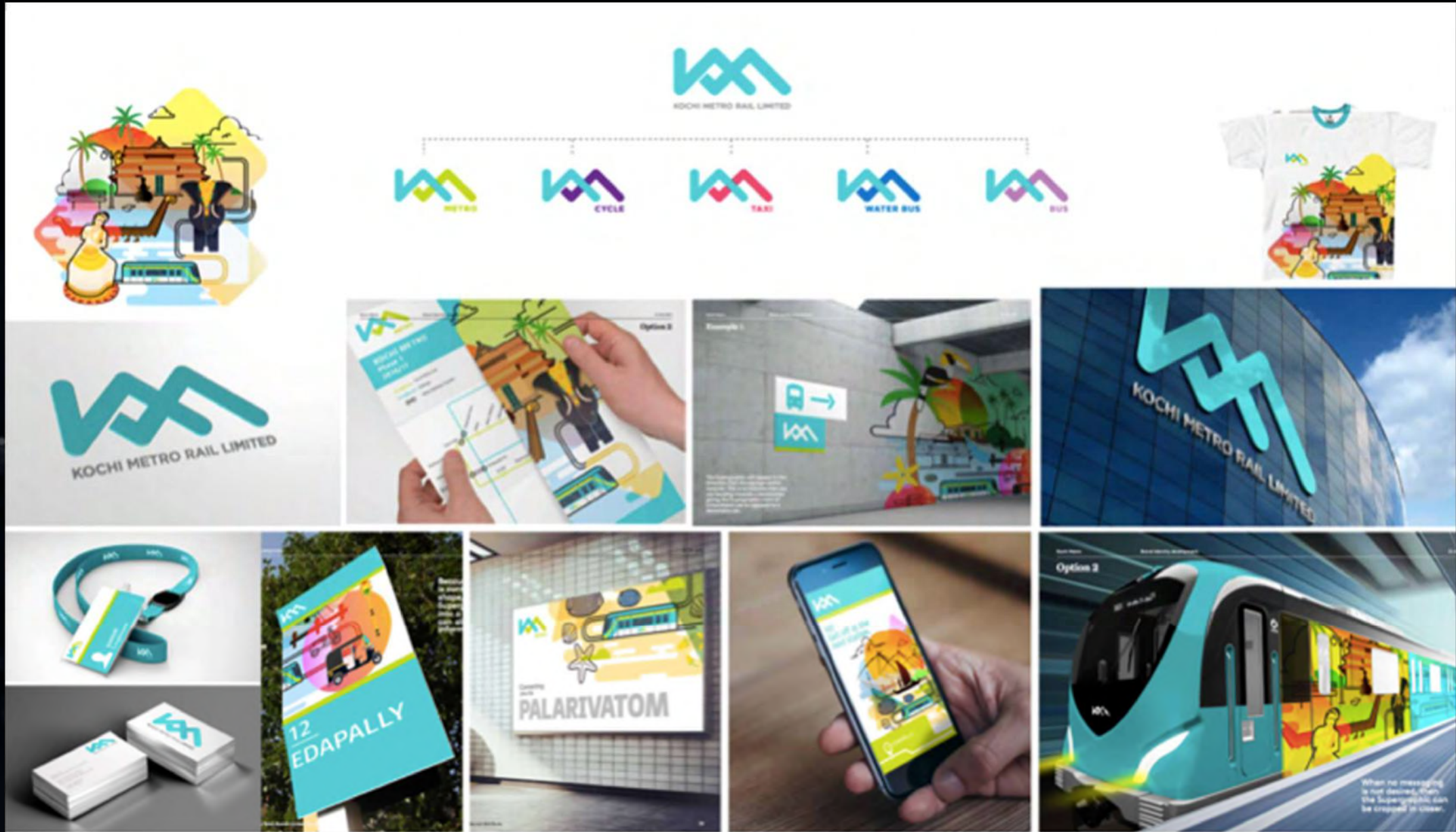


Spiderman

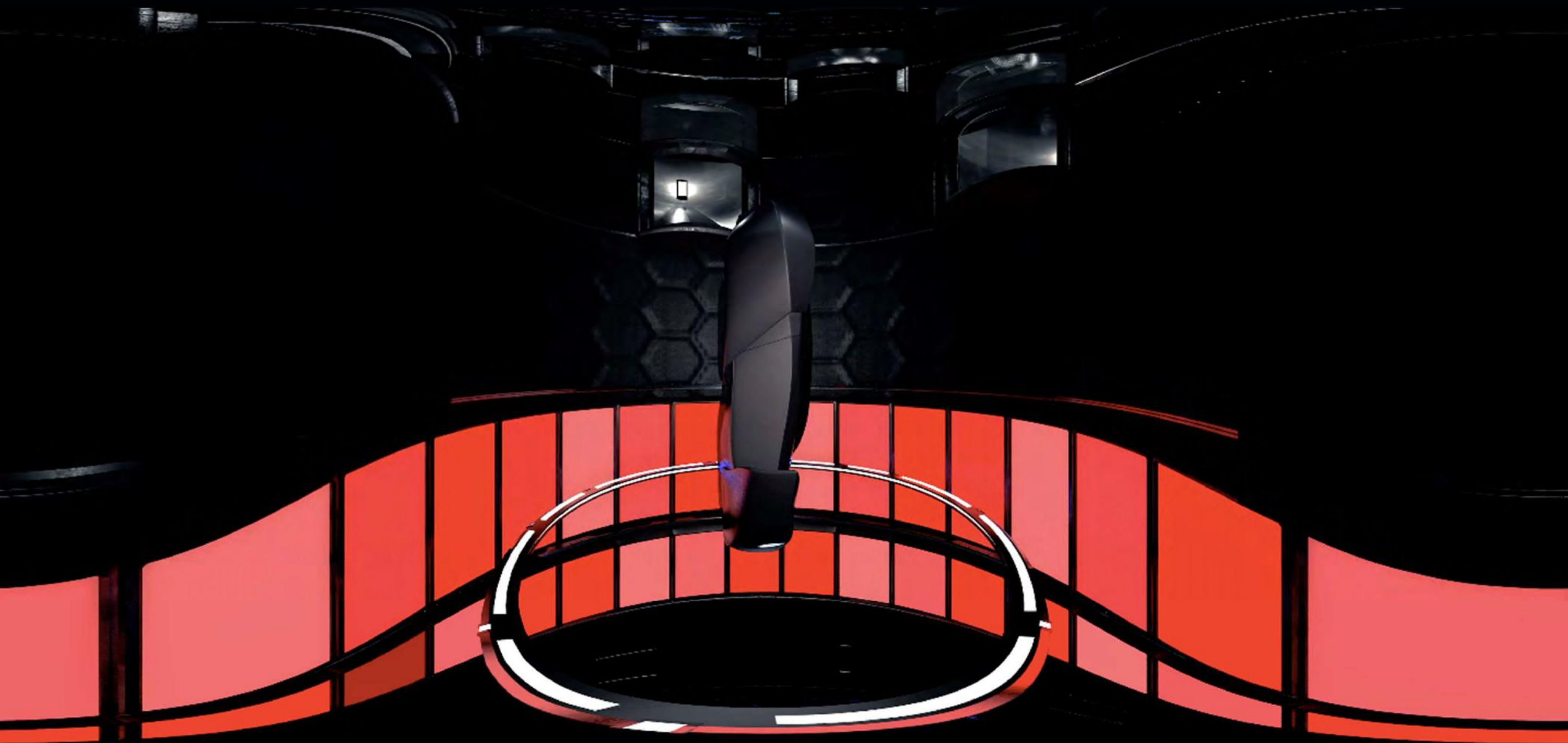
Design Digital - Smart and connected appliances



Design Digital – Integrated design for Mass Transit systems

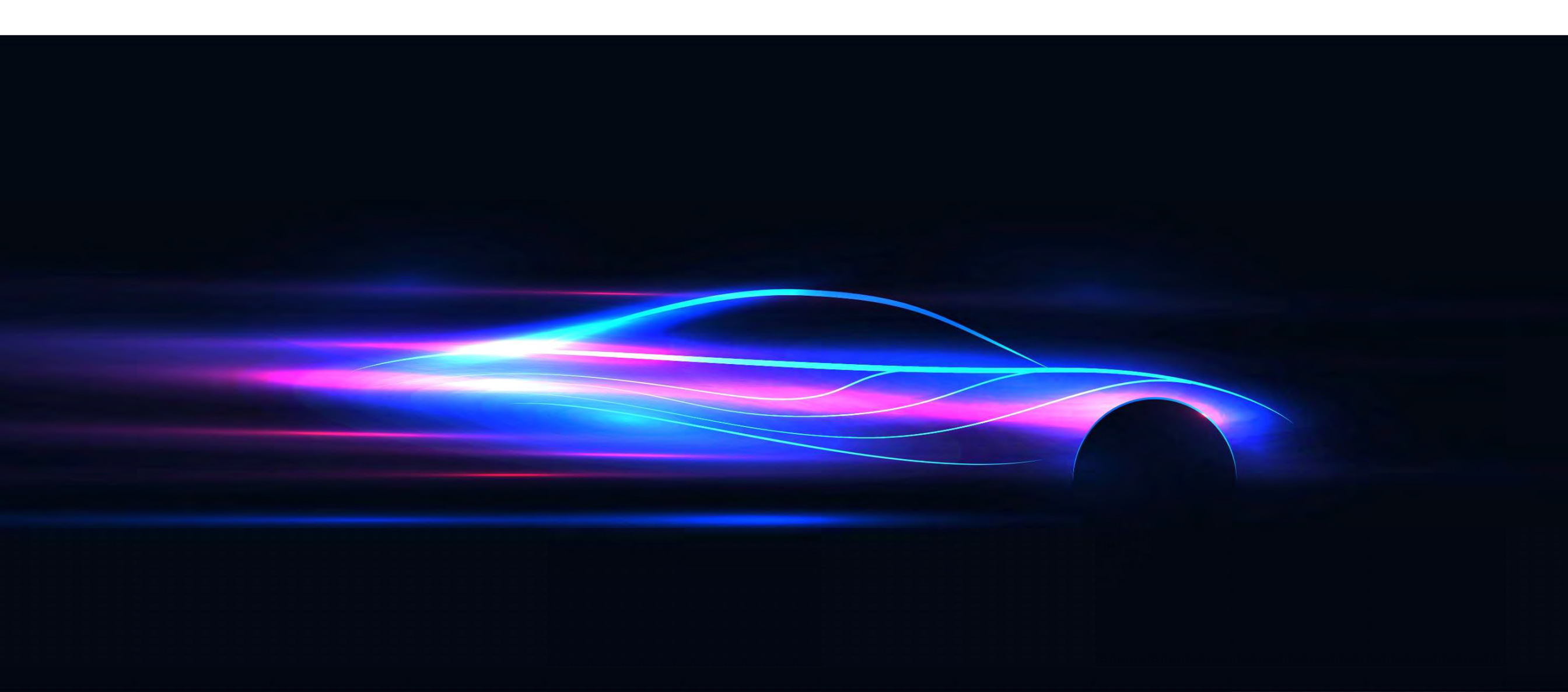


Design Digital – Welcome to the Metaverse...





Thank You



Transportation

Shaju S - Vice President & Head, Transportation

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Changing Automotive Landscape – Mega Trends



96%

CONNECTED

of new vehicles will have built in connectivity by 2030



79%

AUTONOMOUS

of vehicles will have L2 autonomy or higher by 2030



32%

ELECTRIC

of new vehicles will be EV including hybrids by 2030



Paradigm
change from electromechanical
to software



Smartphone
on wheels



OEMs
becoming partial
software companies



**Software-Defined
Vehicles** are on their way

Services & Solution portfolio



V2Xe
V2X Emulator



autonomai
Autonomous middleware platform



E-Power Combo Unit
BMS Battery Management System

Tecockpit
Integrated Cockpit Solution

Green Hills
SOFTWARE
E/E architecture & RTOS

SOFTWARE DEFINED

DMS/CaMS
Driver Monitoring system

RENESAS
Platform provider

TETHER
Connected Vehicle Platform

TESA
Smart Annotation platform

DIGITAL

aws
Cloud provider

ATOM
DevOps Framework

Autom@TE
Test automation suite

V-Drive
AI based scene generator

VALIDATION

Test and Validation
systems partner

eMobility
EV Testing Framework


COMPLIANCE

STAF
Cybersecurity Test automation


For TATA ELXSI digital transformation is **Inside Out**

ON THE WHEELS

● Telematics & V2X

-  • Reusable & HW agnostic
- TCU Cloud Integration


● Cloud

-  • Connected Platform
- Managed Services

● AI ML


-  • Data Management
- Predictive Analytics

● Cybersecurity


-  • Process Compliance
- Validation

BEYOND THE WHEELS


● Manufacturing

-  • Digital Twin
- AI ML Quality inspection


● Training & E learning

-  • Experiential
- AR VR Modules

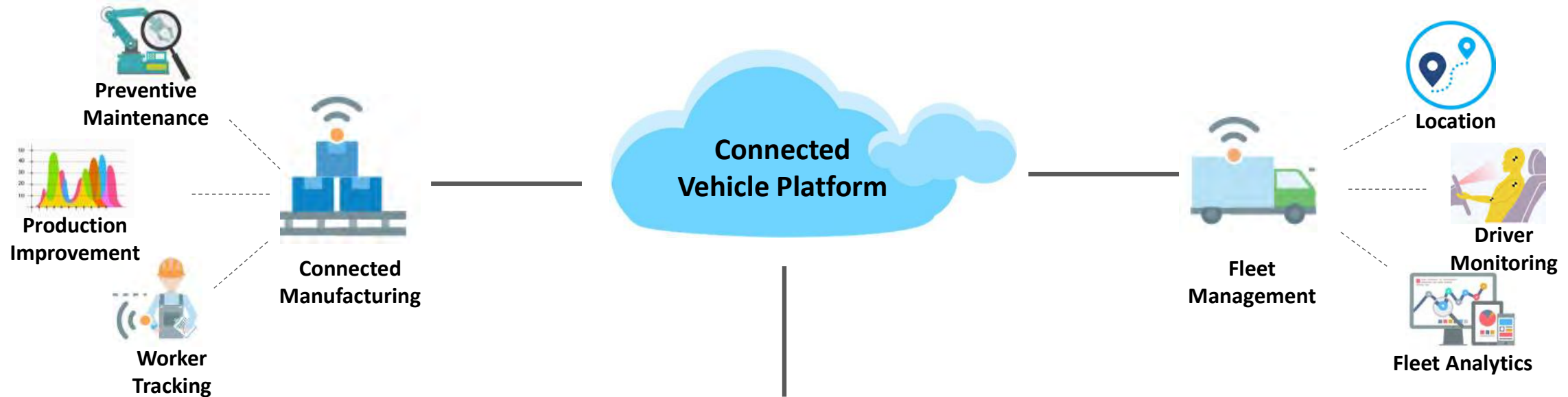
● Safety & Security

-  • MR based safety training
- Ergonomics

● Asset Management

-  • Device to cloud
- AI ML monitoring

Connected Vehicle Platform



BEYOND WHEEL - PLATFORM FEATURES

ON WHEEL – PLATFORM FEATURES

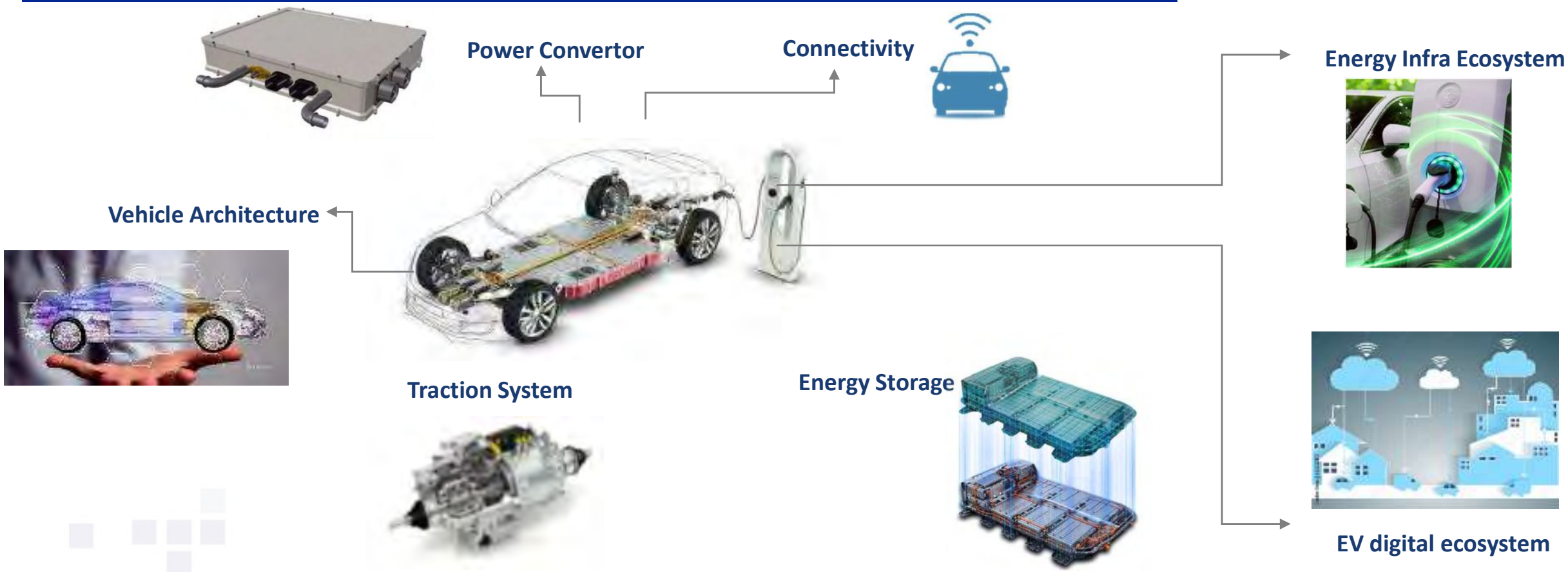
- Parking locator
- Driver Behaviour Monitoring
- Nearest Charging Centre
- Vehicle Diagnostics
- Immobilization



- Remote Lock / Unlock
- Remote Climate Control
- Navigation
- Location & Geo-fencing
- SOS in emergency

Electrification for a Greener future

ON WHEELS



BEYOND WHEELS

Capabilities	Digital Design	Mechanical Design	System Engineering	Embedded Engineering	Verification & Validation	Functional Safety	VAVE & Compliance Testing
Internal Assets	Battery Management System ePower Combo unit Skateboard designs eMobility HILS Digital Twins TETHERED DESIGN DIGITAL						

Key EV Partnerships, Collaborations & Alliances



Next Generation EV Innovation Centre (NEVIC) addresses the fastest growing EV segment – e2W & Light commercial vehicles. Solutions on BMS, Motor, Connected Cluster & Gateways

Academic Collaborations



- IIT-Guwahati
- NIT-Calicut
- VNIT-Nagpur



Contributing towards focus group discussions around CCS global standards for EV charging



An EV open alliance creating an open EV ecosystem. Exploring opportunities to collaborate with new age EV players

Aligning to the Adjacencies



Transferable Technology & Expertise



Similar Industry Trends



Balancing Cyclicality



Farming



Mining



Construction



Rail

Connected

Connected Operations, Remote monitoring, Infotainment

Rail signaling, Display based systems

ADAS

Vision based terrain mapping, Hazard detection, autonomous applications

Driverless trains, Obstacle detection, collision avoidance

Electric

Energy Storage systems, Charging, Supervisory controls

Sustainable rail solutions to reduce energy consumption

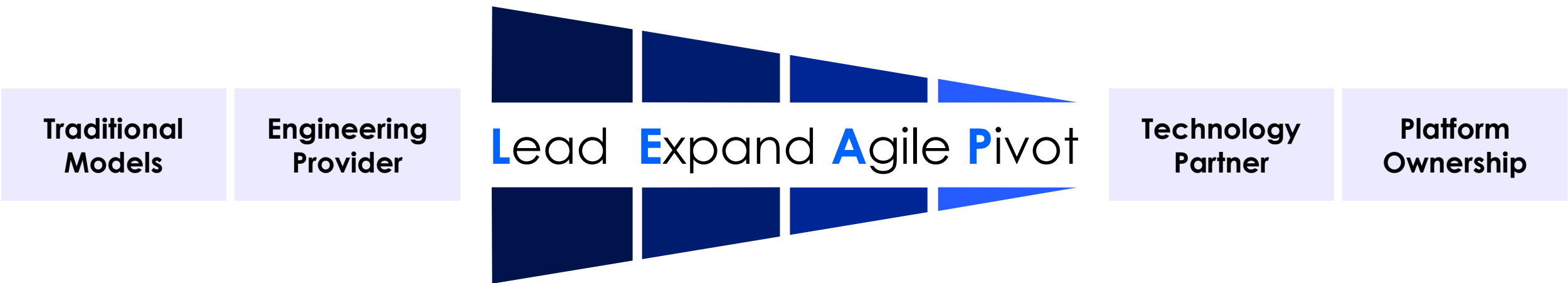
Digital

Cloud based IoT platforms, Telematics

Smart Mobility, Asset monitoring, Internet of Trains

Solution Accelerators

Reimagining Mobility for Tomorrow



PEOPLE



PROCESS



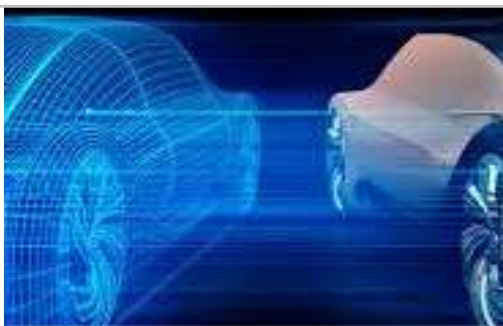
PARTNERSHIP



Cloud
Testing



Digital
Twin



Software
Platform





Thank You



Media and Communication

KP Sreekumar - Vice President & Head, Media & Communication

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Tata Elxsi in Media & Communication Vertical



Multi System Operator

- Cable
- Satellite
- Telco



Media/New Media

- Broadcasters
- Studios



Suppliers

- OEM
- Silicon companies
- Software suppliers

Mega Trends



Open Technology Adoption

Android

RDK

O-RAN

Mega Trends



Digital Transformation

AdTech

Workflow Automation

CX Management

Mega Trends



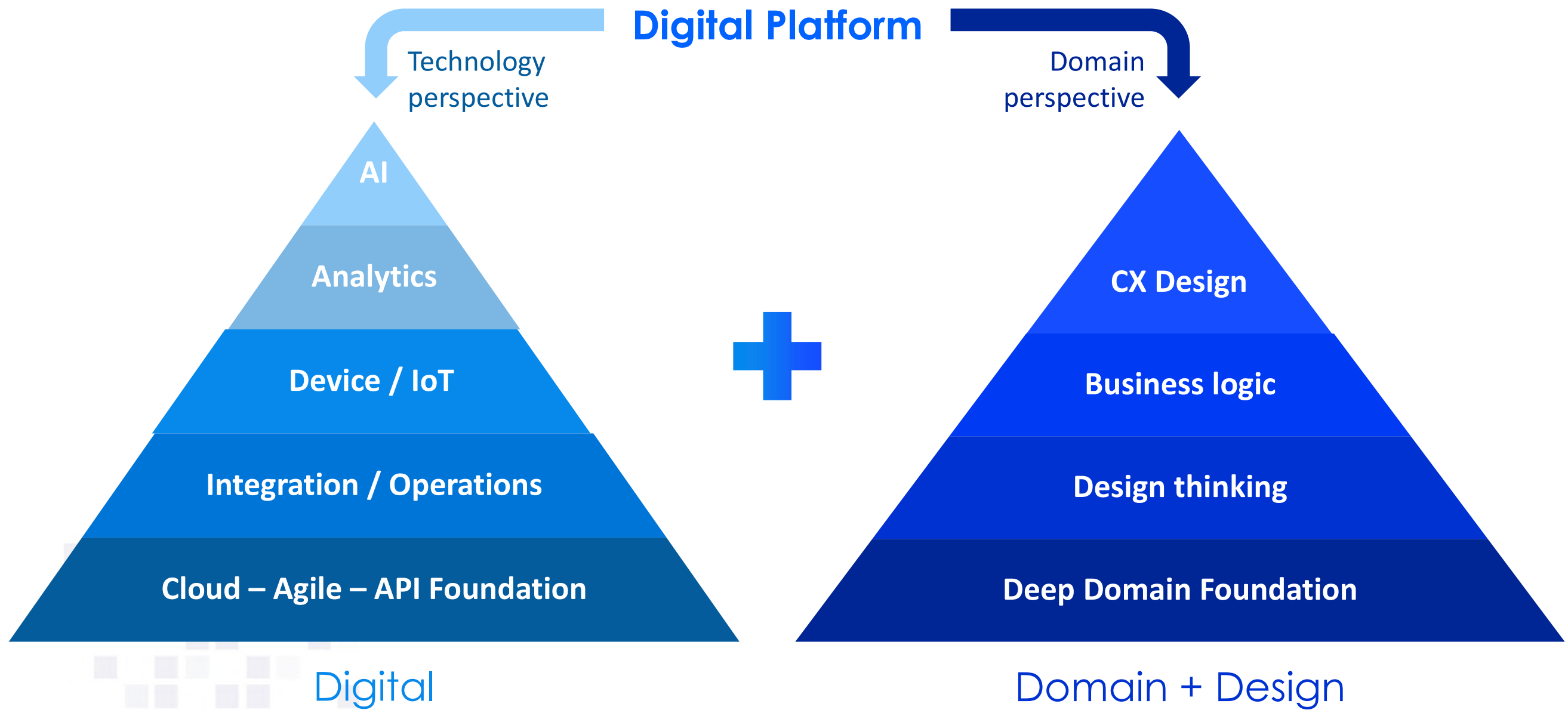
Digital Platforms

Performance Engineering

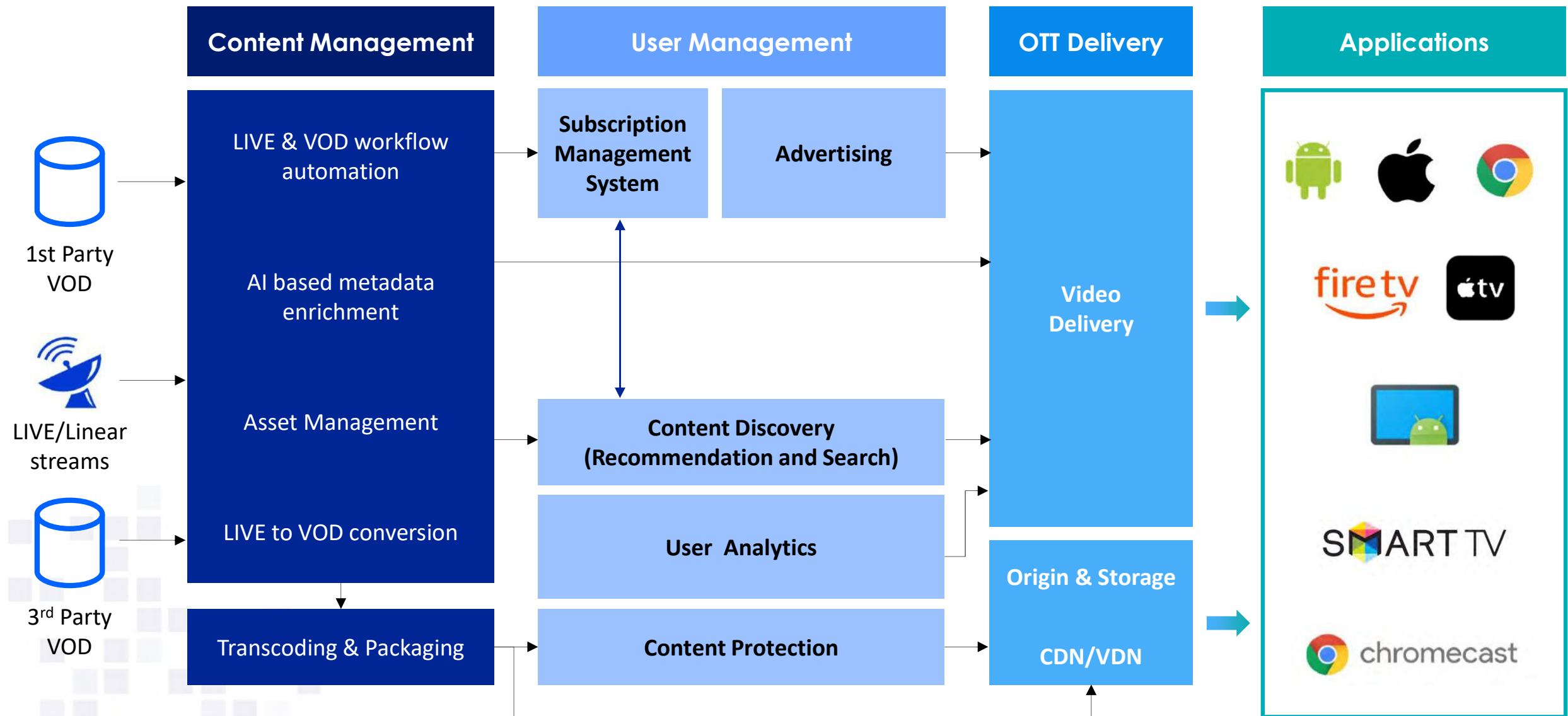
Agile Software Factory

Cloud - Device Integration

Experience Design



Digital business powered by platforms



Products and Platforms powered by Partnerships

Pivoting to Cloud / SaaS based model

Intelligent Video Platforms



OTT Platform



AI Based Video Analytics



TATA ELXSI

Intelligent Customer care and Operations



Video Quality Improvement



Intelligent Customer Experience Management



Open Source
MANO



Intelligent Networks



Hardened NFV
Mano



IoT Platform



Thank You



Healthcare & Lifesciences

Suhas Tamras - Vice President & Head, Healthcare & Life Sciences

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Macro trends driving the R&D priorities in the Healthcare and Life Sciences industry



Globalization & Miniaturization

- Affordable & accessible devices
- Product line extension
- Point of care / home-based care devices



Consumerism in Healthcare

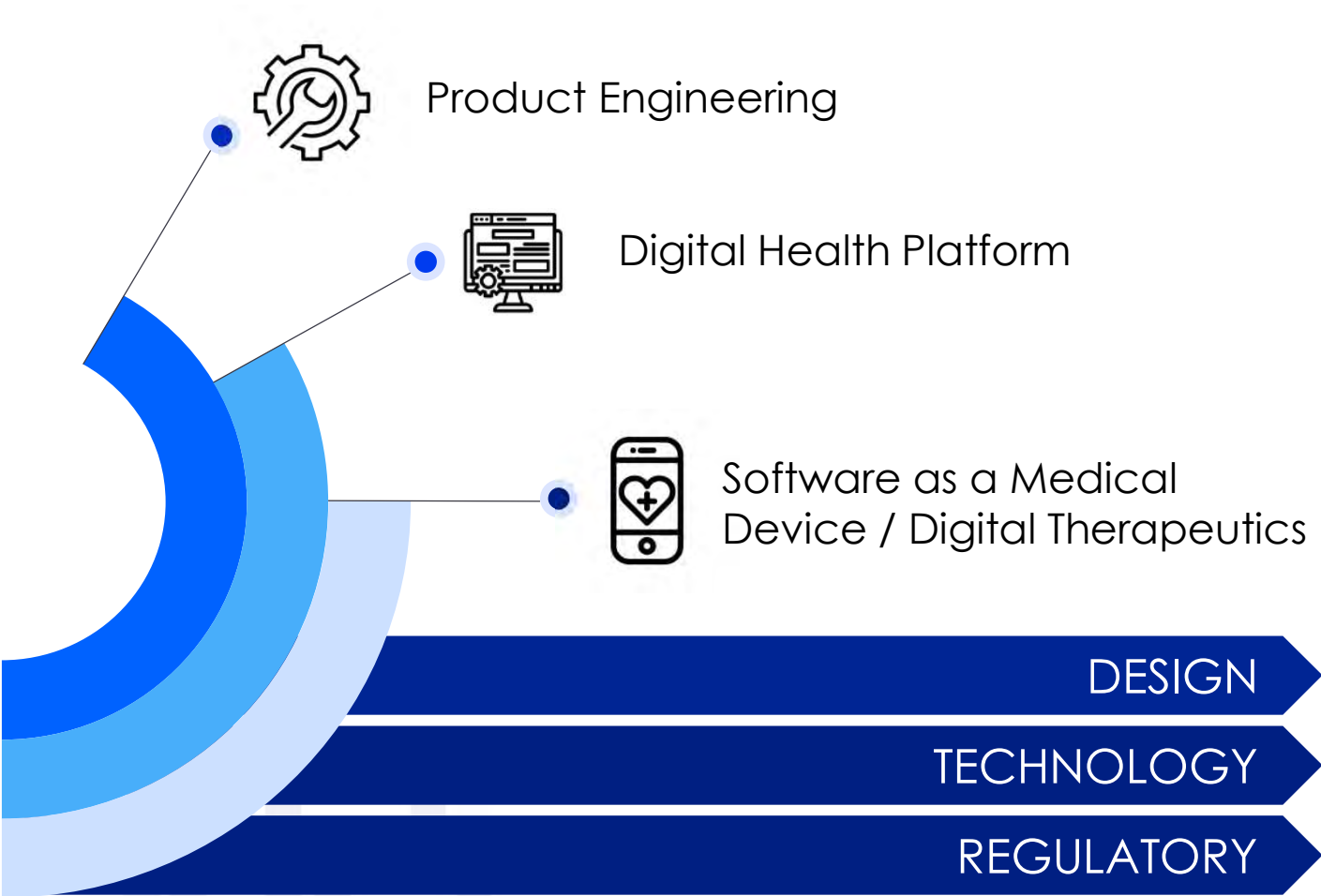
- Digitalization of healthcare
- Patient engagement platforms
- Omnichannel care anytime, anywhere



Value-based Healthcare

- Digital companions – Digital Therapeutics / Software as a Medical Device)
- Remote patient monitoring
- Predictive & personalized care

Helping global businesses **move closer to the patients**
and deliver higher value to all stakeholders



Medical Devices & IVD



Pharmaceuticals



Digital Health

Ecosystem partnerships & alliances* aligned to product life cycle



* Select partners

DESIGN DIGITAL

Business Model and Process Innovation

Promising confidence and certainty



Industry first outcome-based pricing
for regulatory compliance services

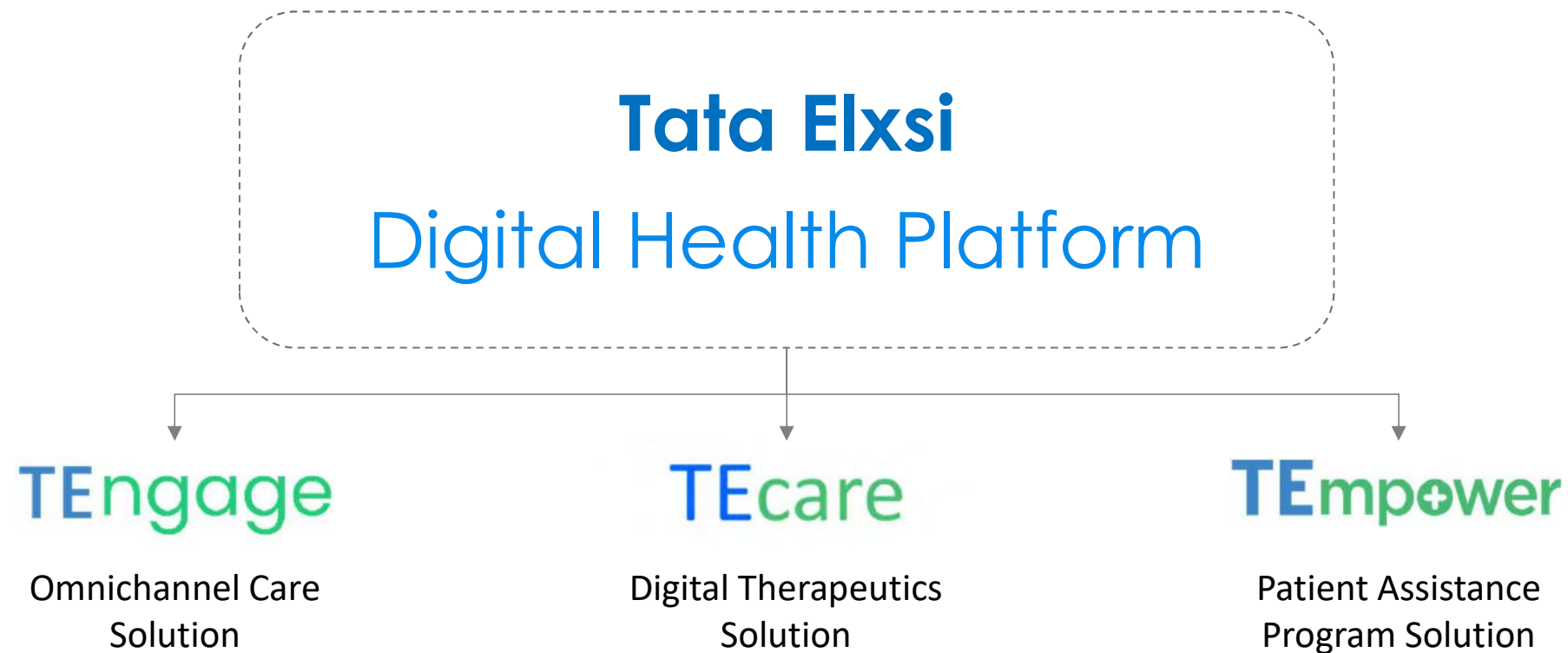
- Certainty -> Compliance outcomes
- Expenditure visibility through catalog pricing
- Predictable outcomes through pre-defined SLAs

ScrumDR

An Agile-based technical document
remediation framework

- Confidence -> Minimum unpredictability
- Agile methodology to address high volume remediation
- Pre-built assets accelerating remediation and compliance

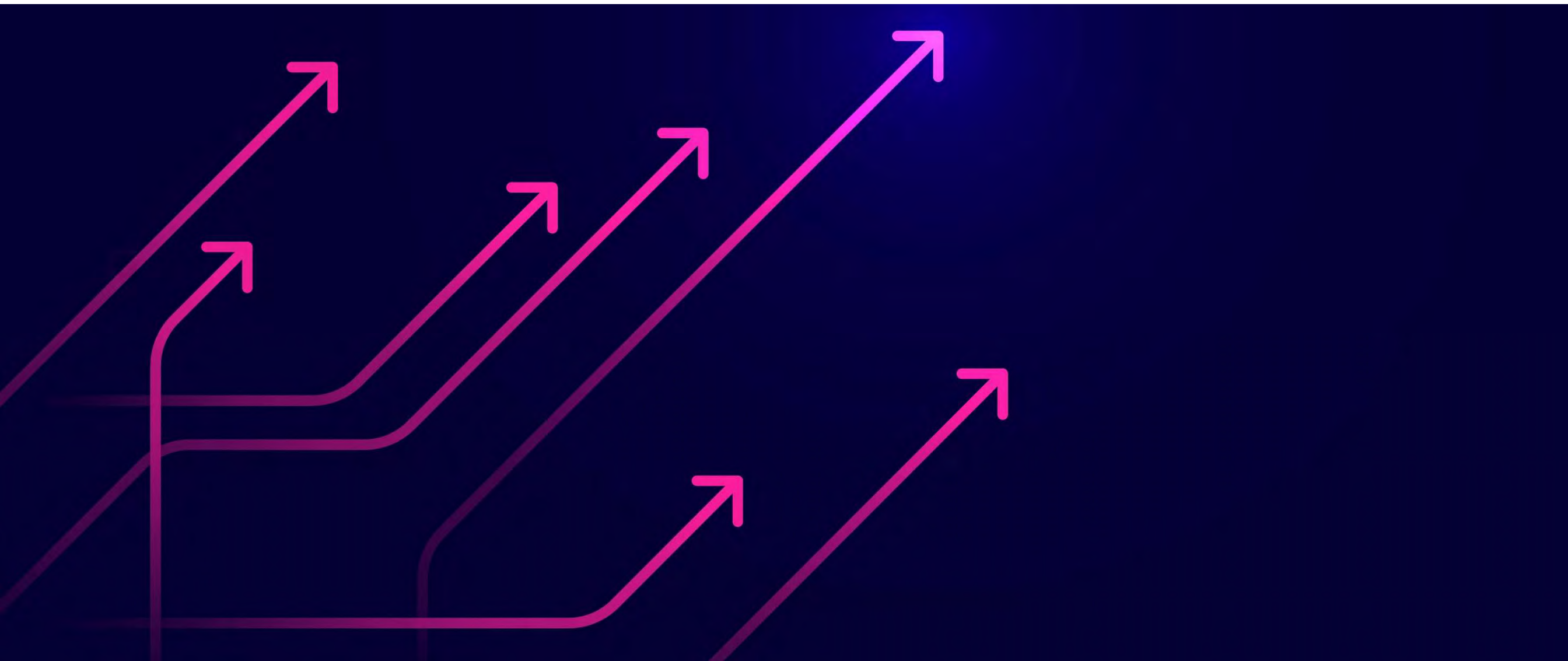
One Platform, many solutions...



Tata Elxsi is a member of the industry alliance focused on transforming global healthcare by advancing digital therapeutics to improve clinical and health economic outcomes



Thank You



Growth Strategies

Nitin Pai - CMO & Chief Strategy Officer

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Our proposition

3D

Design

Design-led engineering
CXO conversations
Early project visibility

Domain

Transportation
Media & Comms
Healthcare & Lifesciences

Digital

IoT
Cloud
AI and Analytics
AR/VR

Foundation

People

Hiring
Skilling
Engagement

Processes

Deep Offshore
Agile
Outcome driven..

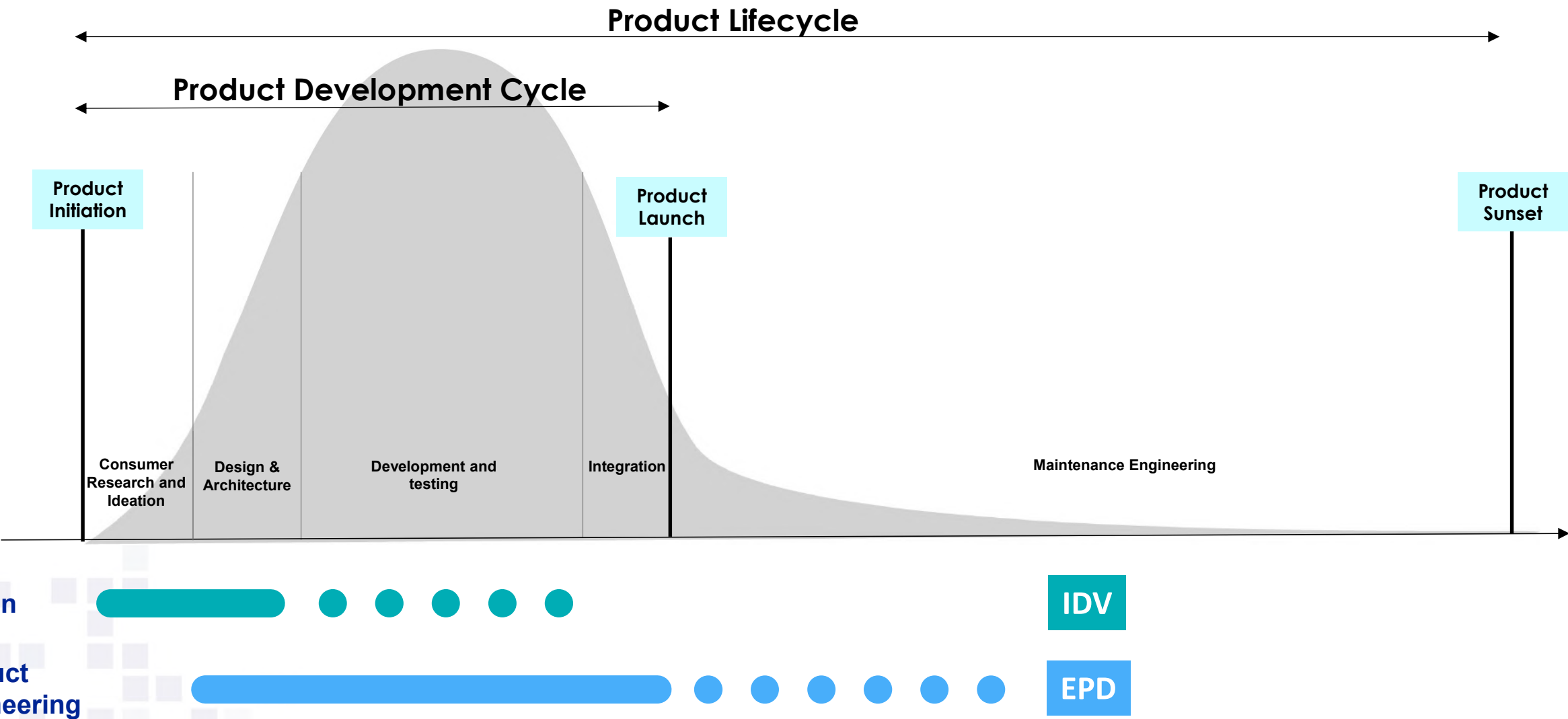
Products

TEngage
TEplay
TETHER...

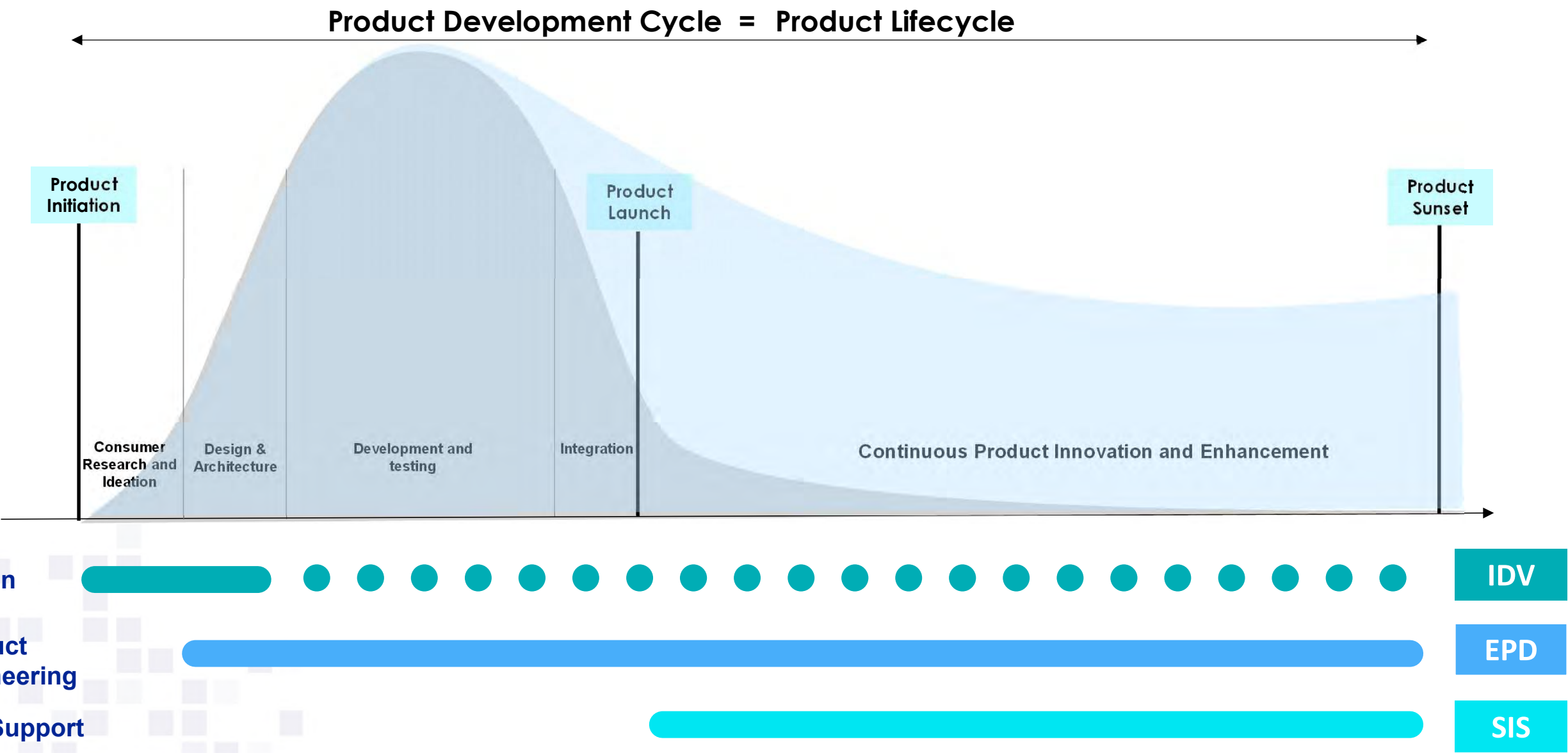
Partners

AWS
Google
Renesas...

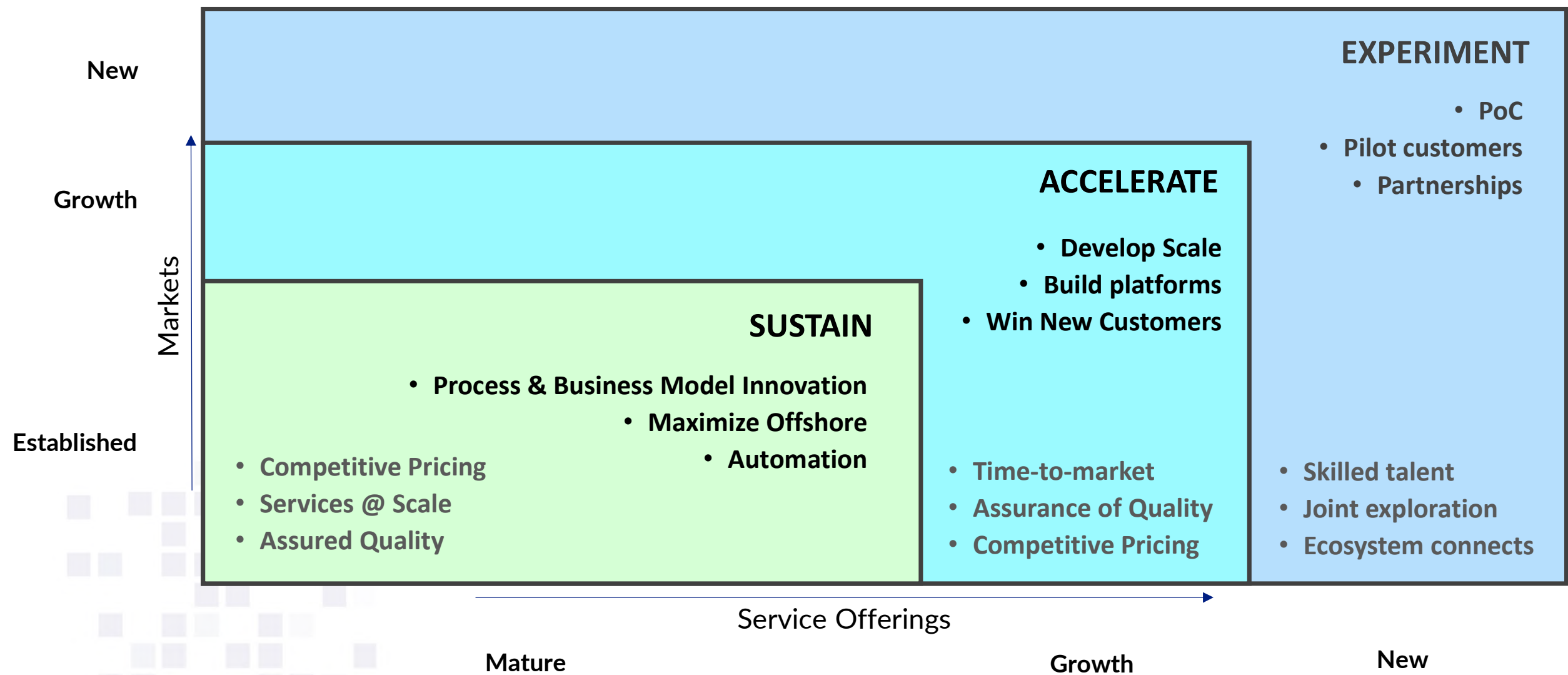
As we knew it....



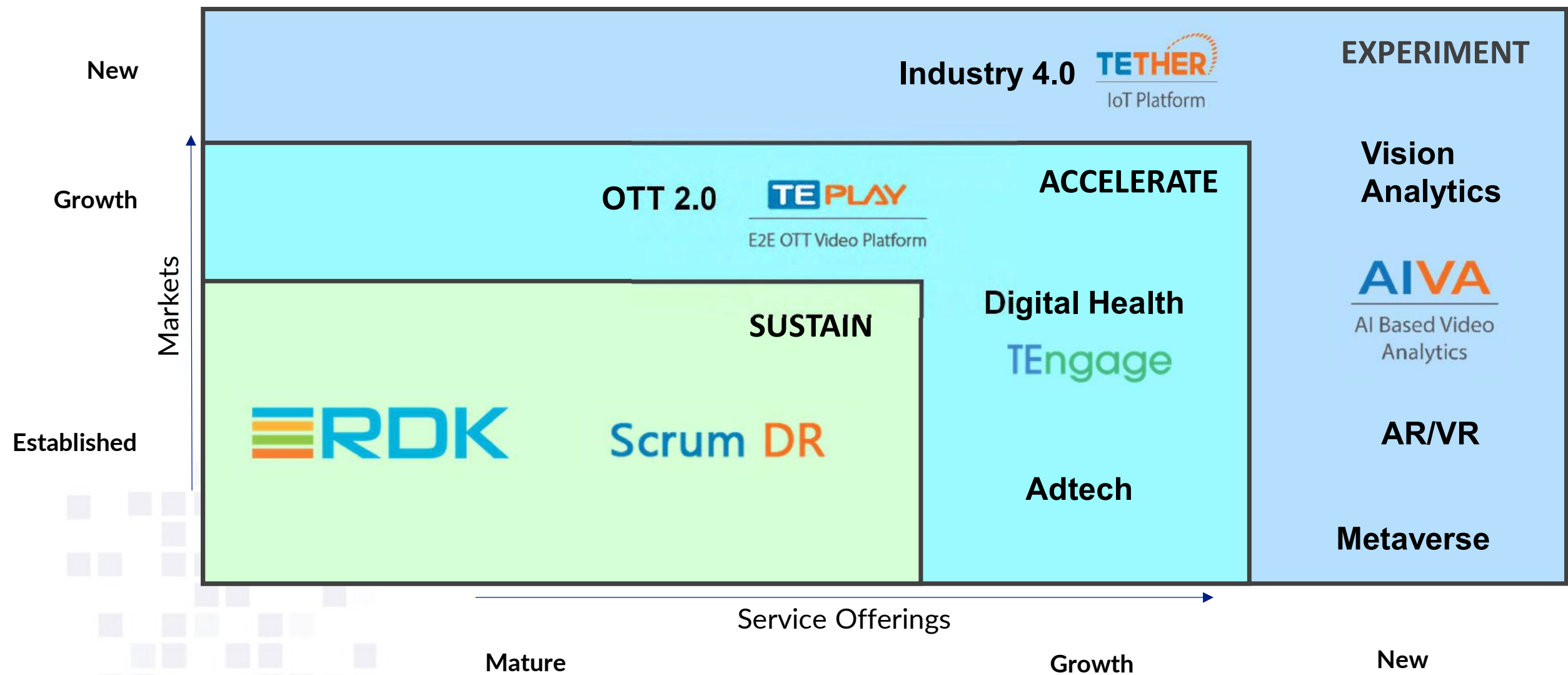
And what it is transforming to....



Frontiers of growth



Frontiers of growth

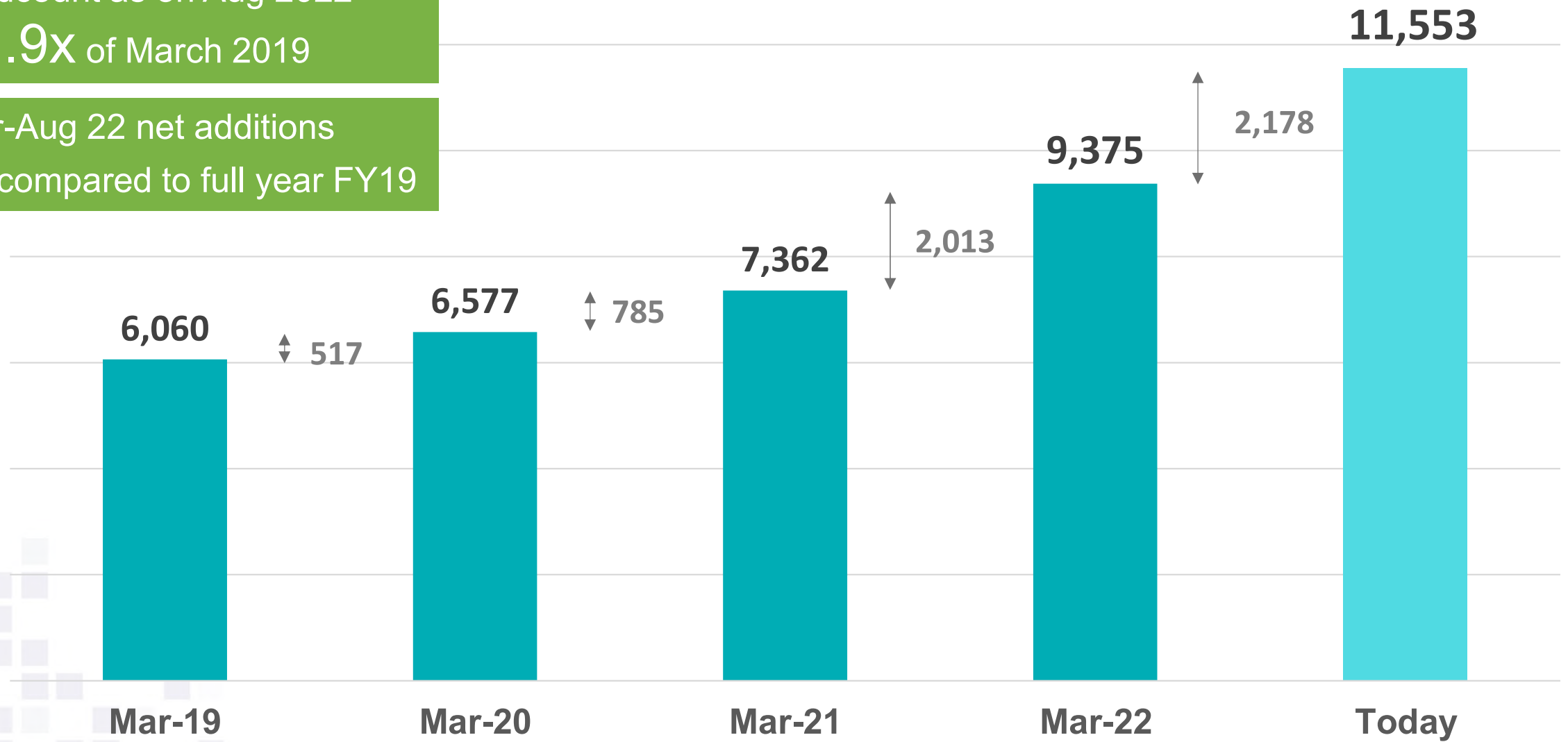


People - Investing in Scale

Headcount as on Aug 2022

1.9X of March 2019

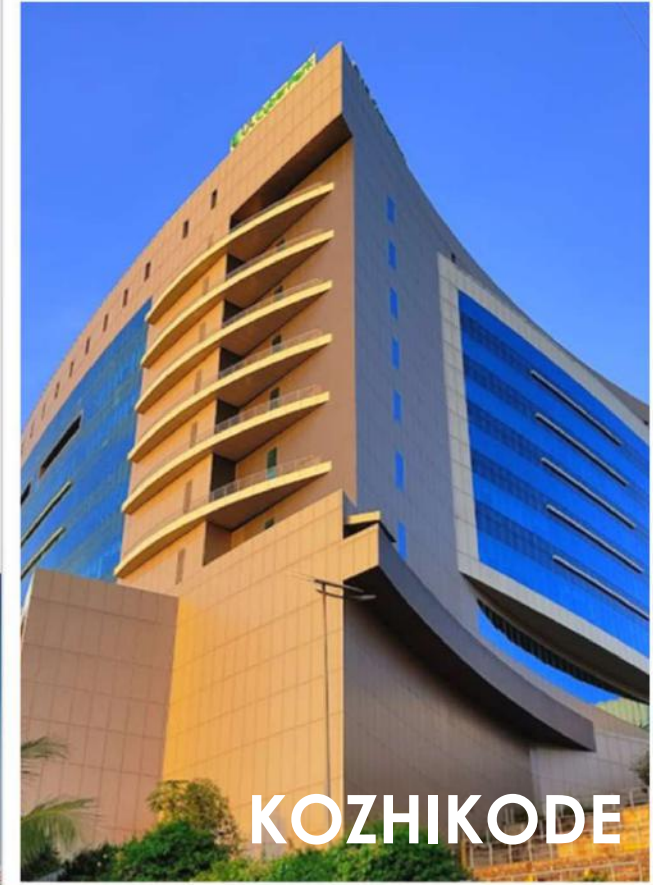
Apr-Aug 22 net additions
421% compared to full year FY19

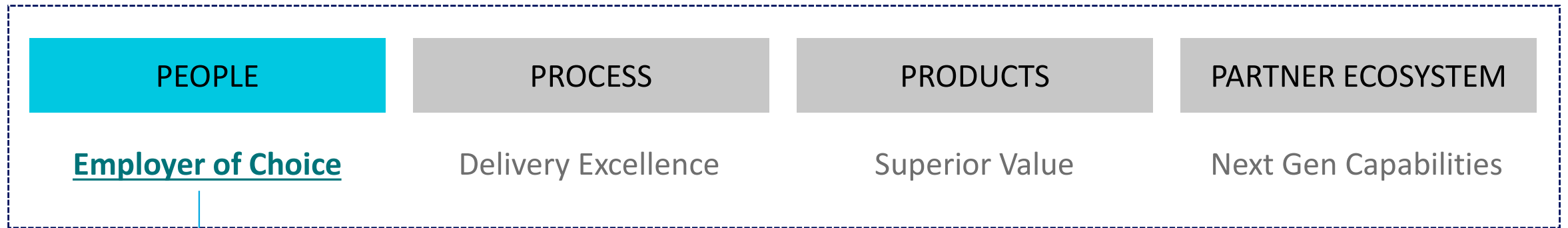


And we are now...



We are expanding our presence...





- How are we perceived by Elxsians, and the outside world?
- What do we uniquely offer?
- How do we capture this, communicate and build on this?

Home to a Billion Possibilities



Opportunities unlimited for everyone - be bold, curious and seek to shape the future.
Explore what's possible, discover what you love to do, and find accelerated paths for growth.

At Tata Elxsi, You Matter!



Go Beyond

Push your limits, challenge the boundaries of the brief and scope. Explore and experiment, we have got you covered!

TATA ELXSI

Home to
a Billion
Possibilities





Script your Future

Shape your career and explore a wide range of opportunities. At Tata Elxsi, you can aspire to rise to the very top. Discover your passion and unleash your potential!

TATA ELXSI

Home to
a Billion
Possibilities





Learning, Everyday

Work alongside some of the brightest minds in creating a 'series of firsts' and learn every day. Set your sights on the next big thing; we'll feed your curiosity!

TATA ELXSI

Home to
a Billion
Possibilities





You Matter

Be part of a community that values you for
who you are and the difference you make.
We genuinely care - the Tata way!

TATA ELXSI

Home to
a Billion
Possibilities





YOU MATTER

Rewards & Recognition Program



Talent Engagement & Development



Wellness Programs



Performance Management System





YOU MATTER

CSR & Volunteering





LEARNING, EVERYDAY

Learning Paths



Specially customised technology courses to ensure a new entrant to a customer program is First Day First Hour productive.

E-Learning

Choose certification programs from the below platforms!



Leadership & Technical Development



O'REILLY®

Hone essential technical and leadership skills. Be future-ready!

Learnify Policy



Your education is our priority! Choose from a curated course list and TEL will sponsor it.

TATA ELXSI

Home to
a Billion
Possibilities



**Go
Beyond**



**Script
your
Future**



**Learning,
Everyday**



**You
Matter**



Thank You