

Investor & Analyst Meet 2017



Mindtree

Welcome to possible

Mindtree 3.0

POWERING NEW POSSIBILITIES

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A Special 18-Year Journey



The Indian IT Service sector is approaching a reckoning

The Traditional model will give way towards an all-new model for success

*Shift to XaaS/
Packaged Apps*

Insourcing / Local

Disruptive Tech
Automation | IOT | AI/Cognitive

New Politics

4

confluent forces
accelerating change
in a way not
experienced before



Digital is the crux to how businesses innovate and differentiate

Clients want partners to offer business acumen and thought leadership
— Not just technology prowess

The new war for talent
— Shortage of digital skills coupled with broken approaches to build skills

Industry is still struggling with the narrative of what Digital transformation entails
— Beyond semantics

CXOs are playing a more formal and aggressive role

The Digital Reality

Shift to the Cloud

		2016 ACV (\$B)	Y/Y
Global Combined Market		\$37.4	9%
By Type	Outsourcing	\$22.9	-4%
	As-a-Service	\$14.5	38%
By Service	ITO	\$16.3	-5%
	BPO	\$6.5	-2%
	IaaS	\$10.0	54%
	SaaS	\$4.6	13%

Source: ISG: 2Q17 Global ISG Index

Our Proposition: Answering the *What* of Digital Transformation

Business transformation is vision-led and Digital-driven
‘So, what’s Digital?’

Businesses are juggling Innovation, Scale and Change.
Only a few have mastered it all.

What are we going to do?
Vision & Strategy

What will we do first?
Clear sense of priority

Do we have the skills?

How will we stay ahead?

And, Cyber Security

Market Opportunity Example: Salesforce

Enterprise Marketplace

**CRM
by
2020**

Largest
segment of
Enterprise
Software
Market

Salesforce Economy

**By
2020**

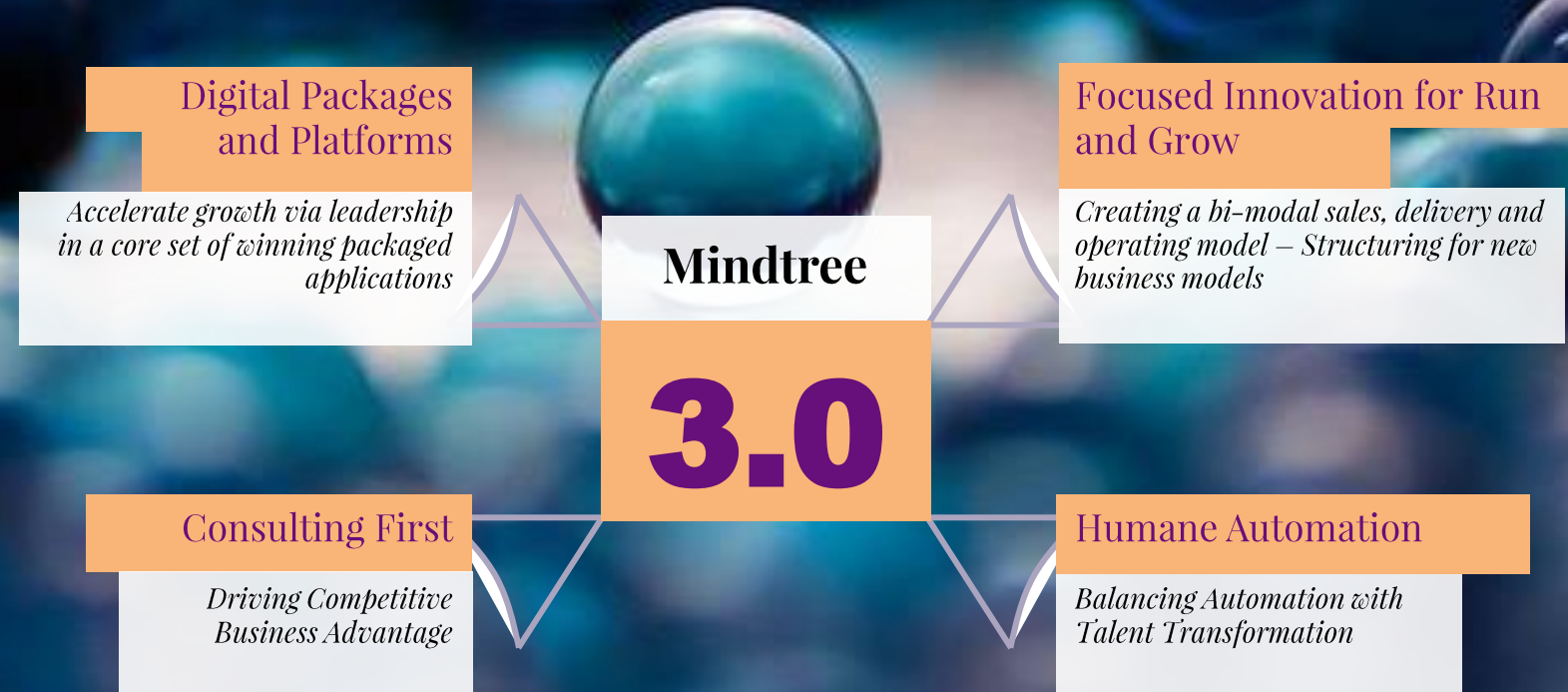
Salesforce
\$1
=
Partner
\$4.1

Partner Advantage

\$260B
Cumulative
Consultative
Revenue

≈10X
number of
Consultants
needed to
address 2020
market
demand

Driving Change to Maintain Digital Leadership



Structuring for Success



Digital

Iconic Motorcycle Brand

Global Visa Processing Service

World's largest hotel chain

Leading consumer brands

Large Airline

Home Improvement Retailer

The most loved airline

Payer systems software provider

Global chip maker

Major insurer

Large re-insurance company

Global title insurance provider

Traditional

Strong Wins in CY 2017

Make Digital Real For a Global CPG Company

Next-generation CRM data and analytics platform to get 360° view of the consumer

Building the largest marketable database in their segment

Holistic consumer picture
from all touchpoints

Personalized across
platforms, devices &
channels

Across more than
50 brands

Merging ad-tech to
known-customer

Won against larger competition. Initially 12. Then 4-week design-phase bake-off vs. a WITCH

Solutioning expertise

Digital Anchor Partner

Salesforce Talent

Demonstrated Big Data
Capability

Thank you