



Possibilities Summit

# INVESTOR DAY

February 23



**Venu Lambu**

*Executive Director & President  
Global Markets*

UP NEXT

# Getting businesses to the future, *faster*



Mindtree

A Larsen & Toubro Group Company

Get  
to the future,  
+ *faster* \*



Venu Lambu  
Executive Director & President, Global Markets

# A Look Back at FY22

	STRATEGIC LEVERS FOR FY22	ACCOMPLISHMENTS
 <p data-bbox="137 778 570 1145">FY 2022</p>	<b>Expand Wallet Share</b>	<ul style="list-style-type: none"> <li>• 22 new logos added</li> <li>• 80%+ Revenue (YTD FY22) from FOCUS 100 accounts</li> </ul>
	<b>Whitespace Opportunities</b>	<ul style="list-style-type: none"> <li>• Incubated Health Industry Group</li> <li>• Acquired Mindtree NxT for Industry X.0 Capabilities</li> </ul>
	<b>Double Down in Europe</b>	<ul style="list-style-type: none"> <li>• Investment in Poland Nearshore Center</li> <li>• Expansion in Germany, Finland, and Denmark</li> </ul>
	<b>Hypergrowth with Hyperscalers</b>	<ul style="list-style-type: none"> <li>• Service Now Partnership Level from Premier to Elite</li> <li>• 13 New Solutions Launched on GCP</li> <li>• Earned AI/ ML Azure Specialization</li> </ul>
	<b>Industry Partnerships &amp; Consulting</b>	<ul style="list-style-type: none"> <li>• Strengthened Consulting with 70+ Consultants</li> <li>• Launched New Offerings the Areas of Sustainability (ESG), M&amp;A, Metaverse</li> </ul>
	<b>Market &amp; Thought Leadership</b>	<ul style="list-style-type: none"> <li>• 70+ Industry Analyst Mentions in Our Strength Areas</li> <li>• 'Strikingly Different' Training for Sales</li> </ul>

# What Our Clients Are Saying

“**Core modernization** is not simply migrating platforms to cloud...”

CTO, A LEADING REAL ESTATE COMPANY

“There is a **huge opportunity in AI/ML** in transforming how business processes work...”

CHIEF INNOVATION OFFICER,  
A GLOBAL CHARITABLE INSTITUTION

“**Sustainability** has become a **holistic agenda** across our organization...”

SVP & CIO, A LEADING FOOD COMPANY

“...We are moving the **personalization** conversation a step further to **customer empathy**...”

SVP, CHIEF EXPERIENCE OFFICER, A  
LEADING CONFECTIONARY MAKER

“Strategic partnerships are the key when scaling needs to be done continuously for faster outcomes. **Simplifying the ecosystem** helps the organizations to scale better”

VP, LEADING GLOBAL HEALTHCARE COMPANY

“...learning has translated into extensive use of **next generation technologies—automation, digital twinning, sensorization**”

CIO & HEAD OF IT, LEADING GLOBAL CPG COMPANY

# Market Analysts' Views

The **Artificial Intelligence (AI)** market is expected to **break the \$500 billion** mark in 2023.

IDC

**Worldwide IT spending** is projected to total \$4.5 trillion in 2022, **an increase of 5.1%** from 2021.

GARTNER

By 2025, **more than 50 billion devices** will be connected to the **Industrial Internet of Things (IIoT)**.

MCKINSEY

**Over half of enterprise IT spending** in key market segments to **shift to the cloud** by 2025.

GARTNER

Digital economy to hit **4.8 trillion USD** during second digital revolution.

OVUM

**25% of people** will spend at least one hour per day **in the metaverse** by 2026.

GARTNER

# Digital Transformation is Multi-staged



## DIGITIZE



**Digitizing** existing business processes

## REIMAGINE



**Reimagining** digitized business process

## REDEFINE



**Redefining** existing business model

## FUTURE-READY



Getting to the **future-ready** businesses

Businesses are in different stages of digital transformation  
& can move based on their maturity

# Our Big Bet

We are enabling our clients to...

Get  to the future,  
+ *faster* \*



*This is more than  
just increased digitization*

# Strategic Levers for FY23

Build Full Stack Accounts

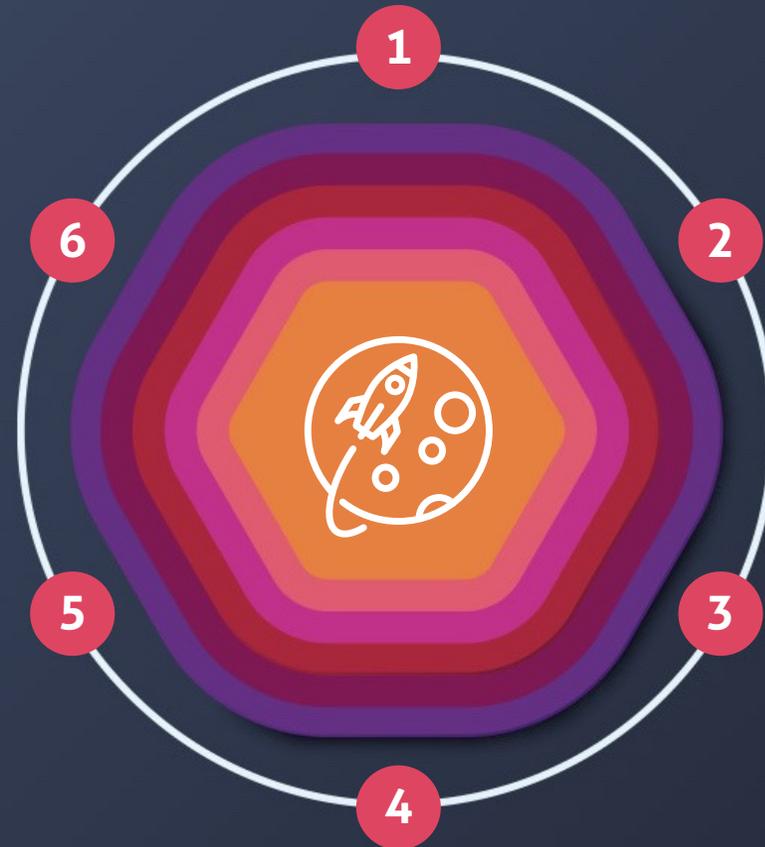
Next-gen Delivery Capabilities  
for Integrated Solutions

Reimagine the  
Ecosystem

Enable Industry  
Convergence

Shift From Run IT to  
Product IT Ops

Edge to Experience for Industry X.0

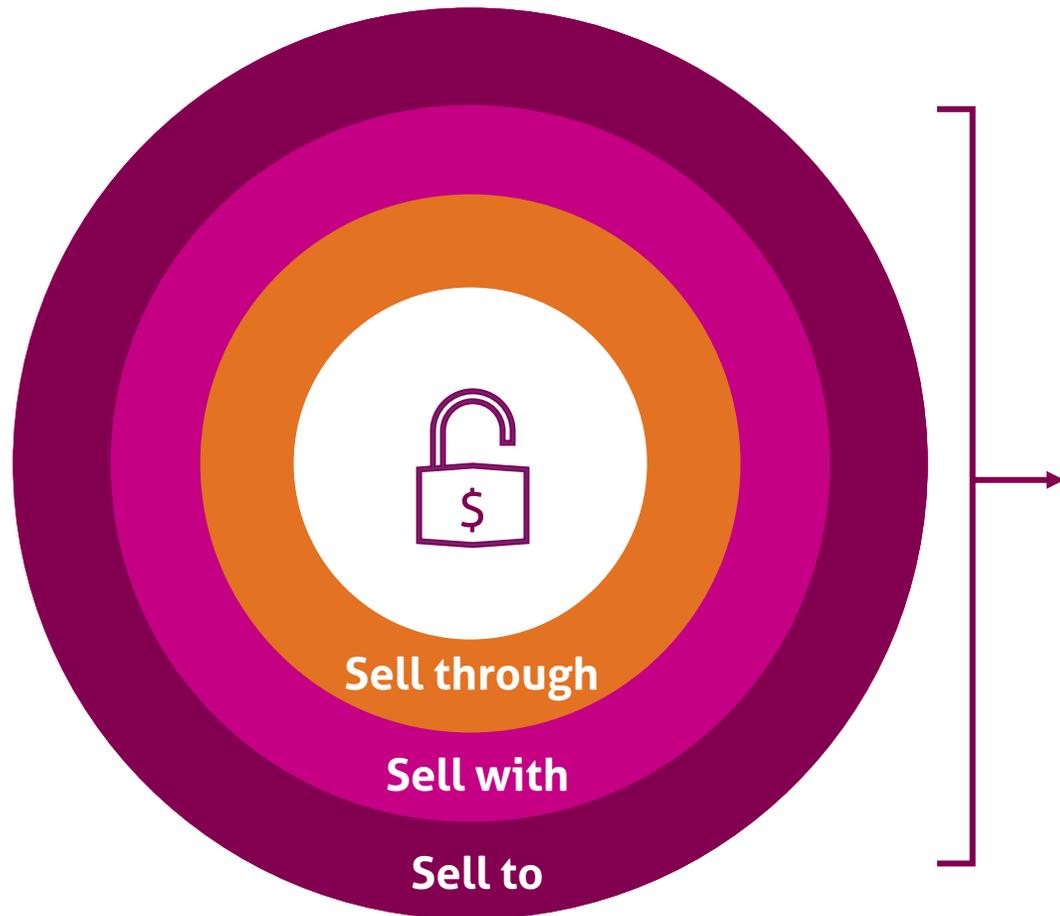




*Transforming a US-based Life, Annuity, and Retirement Provider  
As a Digital Powerhouse Built for the Cloud*

By Partnering Across Digital, Data, and Cloud for the Enterprise

# Reimagine the Ecosystem



Unlocking Business Value: Energized Ecosystem

Strategic Tech Roadmap for Customers

Focus on Co-creation, Co-innovation, and Co-investment for Future-ready Solutions

Curated Ecosystem Partners to Reduce Complexity

*Governed, funded, and enabled by a dedicated hyperscaler unit*



*Helping a Footwear Brand Transform the Digital Experience for Athletes*

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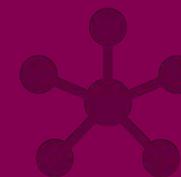
Shift From Run IT to Product IT Ops



**INDUSTRY X.0  
BLUEPRINT**



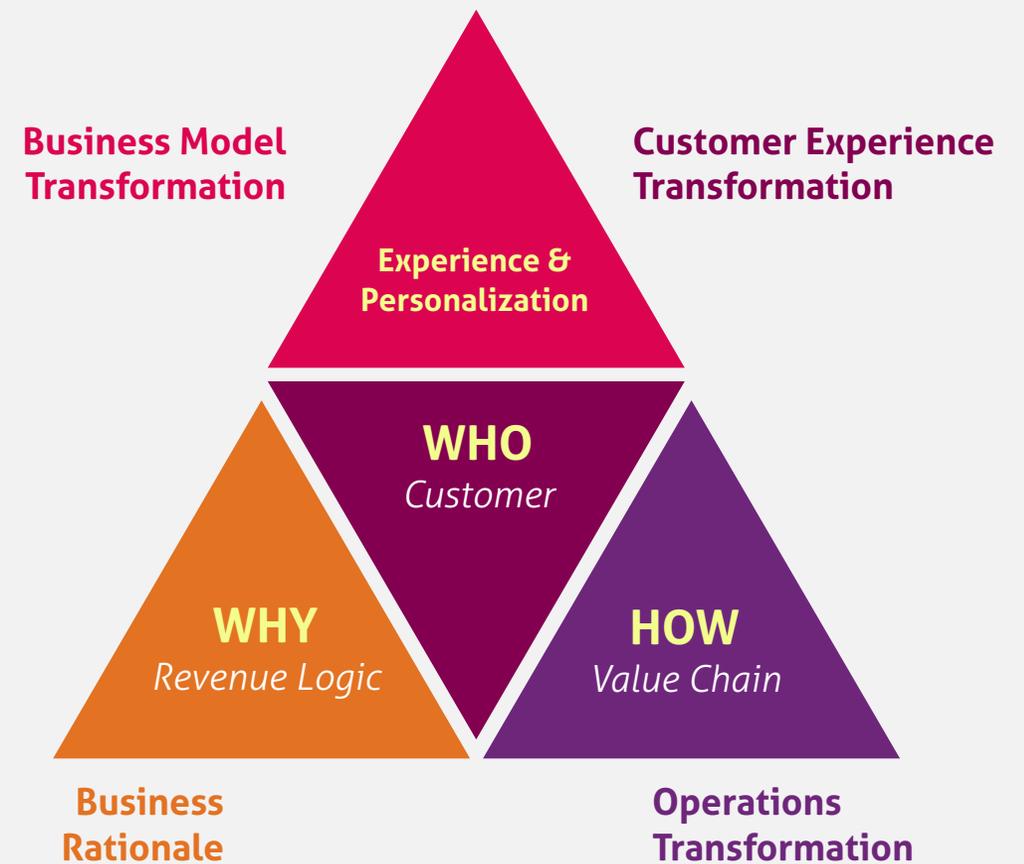
**DIGITAL  
OPERATIONS**



**IT-OT  
CONVERGENCE**

*Digital Smart Factory Strategic Assessment—65 factories, 40 mines,  
5 core departments over 7 regions, to execute Industry 4.0 Projects*

By Leveraging Edge-to-Experience Capabilities through Mindtree NxT



*Helping a Leading US-based Real Estate Company Move from Traditional Business to a Platform Company with Capabilities for Exchange of Financial, Communication, and Tenant Services*

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By Business Model Reimagination Led by Consulting Engagement



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**Manikandesh  
Venkatachalam**

*Chief Business Officer—Travel,  
Transportation and Hospitality*

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# Getting businesses to the future, *faster*

*Travel, Transport & Hospitality*



# Strong Recovery Expected from March 2022



**Southwest**

Omicron impact does appear to be isolated to January and February. And we expect a profit in March.

*Robert E. Jordan Executive Vice President & Incoming Chief Executive Officer, Southwest Airlines Co.*



**DELTA**

We remain confident in a strong spring and summer travel season, with significant pent-up demand for consumer and business travel both domestically and internationally.

*Edward Herman Bastian Chief Executive Officer & Director, Delta Air Lines, Inc*



**American Airlines**

Bookings are recovering fast after dropping off due to Omicron however they are not back to pre-omicron levels yet.

*Robert Isom Incoming Chief Executive Officer, American Airlines*



**MARRIOTT  
VACATIONS  
WORLDWIDE**

While we have seen a modest impact in January related to Omicron, forward looking trends remain strong, illustrating the resiliency of our leisure-focused business model

*Stephen P Weiss Chief Executive Officer, Marriott Vacations Group*



**RYANAIR**

We hope that the rollout of booster vaccines across Europe in recent weeks, and growing evidence that Omicron is less virulent than other variants, will enable EU governments to remove travel restrictions and restore consumer confidence in inter EU air travel well in advance of Easter

*Michael O'Leary Chief Executive Officer, Ryanair*

# Changing Customer Needs and Demand Shifts

TODAY

TOMORROW

Creating Value

## Re-imagining the Existing Business



Touchless Check-in Kiosks



Contactless Arrival & Mobile Key



Contactless Car Rental



Air Cargo Logistics Business



Subscription Travel Model

Finding Value

## Digitizing Existing Business Processes



Reservation System Mainframe to Cloud Migration



Call Center Modernization



Automated Refunds Processing

## Redefining the Business Model



New Loyalty & Alliance Products



Holidaying: Experiences, Not Destinations

Existing Business

New Business

# Travel Cloud

*Travel companies need to use cloud for innovation to unlock new business value. The hyperscalers have now enabled solutions with specific industry cloud focus to grow and innovate for the future.*



**Traveler 360  
Hyper-personalization**



**Next Generation  
Contact Center**



**Cloud Data Pricing  
Solution**



**Disruption Recovery  
Solution**



**Contactless Travel**



**Mainframe  
Modernization**



**Mukund Rao**

*Chief Business Officer —Banking,  
Financial Services and Insurance*

**UP NEXT**

# Getting businesses to the future, *faster*

*Banking, Financial Services & Insurance*

# Clients are Looking to Get to the Future, *Faster*

## Entering 2022

Banks emerged Stronger

Rapid growth in Digitization

Convergence of Industries

Heightened M&A

Drive to be Purpose Driven Organizations

## Evolving Themes

1 **Business-first Digital Transformation at Scale**

2 **Platform Stacks → Solution Stacks**

3 **Cloud at the Heart of the business**

4 **Empowering Customers**

5 **Agility + Efficient Operations**

# Evolving Mindtree BFSI → helping clients get to the Future, *Faster*

1	Discrete Initiatives → Transformation at Scale	→	'Full-stack' transformation for a \$500B AUM Asset Manager
2	Platform → Solution Stack	→	'Experience to Core' transformation for a Medical Malpractice Insurer
3	Cloud → Partner of Choice	→	'Mainframe to Azure' for a Retirement and Employee Benefits Insurer 'Multi-cloud' for a Fortune 100 Cards & Payments processor
4	Domain Offerings → developed with Partners	→	Financial Engine for Well-being, ESG, BNPL
5	Enterprise Agility → M&A, Product IT	→	'M&A partner of choice' for banks, ratings agencies and insurers
6	Remain Partner Of Choice → New Tech, MarTech	→	Crypto trading platform build for a UK financial institution IoT partnership with a Global P&C Carrier
7	Focus for Growth → Global	→	Wins in Tier-1 financial institutions - <b>US, Europe, ME, and ANZ</b>

# Reimagining the Ecosystem



**Banking**



**Cards & Payment**



**Capital Markets**



**P&C**



**Life & Annuities**

## Industry Partnerships



Cloud native composable core banking platform



Digitized loan origination platform built on Salesforce



SaaS cloud ready payments platform



Integrated trade and risk management suite



Enterprise Data Management tool



Full Suite P&C platform — policy, billing and claims modules



Decision management platform for property & casualty, life & annuities and more

## FinTech and InsurTech Partnerships



Tookitaki

AI/ML-based powered platform to reduce AML false positives



Neener Analytics  
Human-Data Science™

AI-powered financial risk decisioning using alternate data



Salesforce based digital lending platform



Capital Quant Solutions

Deep learning / NLP platform to transform unstructured documents into structured insights



ESG investment research & risk analytics platform



AI/Vision Learning solution for auto claim assessment



Low code digital solutions for personal and commercial lines

## Enterprise Partnerships

# Impact at Scale

**Transformation Partner for Digital, Data, Cloud and Infrastructure for A US Fortune 250 Life, Annuity, and Retirements Provider**

**17 Million** Lives Across Life, Annuity, and Retirement Plans  
**\$303 Billion** in AUM  
**17.5 Billion** in GWP

**Product-IT Model Evolution, Modernization to Native Cloud, Data Fabric on the Cloud for a large Global Credit Ratings Agency**

**2.8+ Billion** Consumer Credit Card Files Delivered  
**21.7 Million** Mortgages and Home Equity Loans Enabled  
**85** New Products Delivered just in 2021

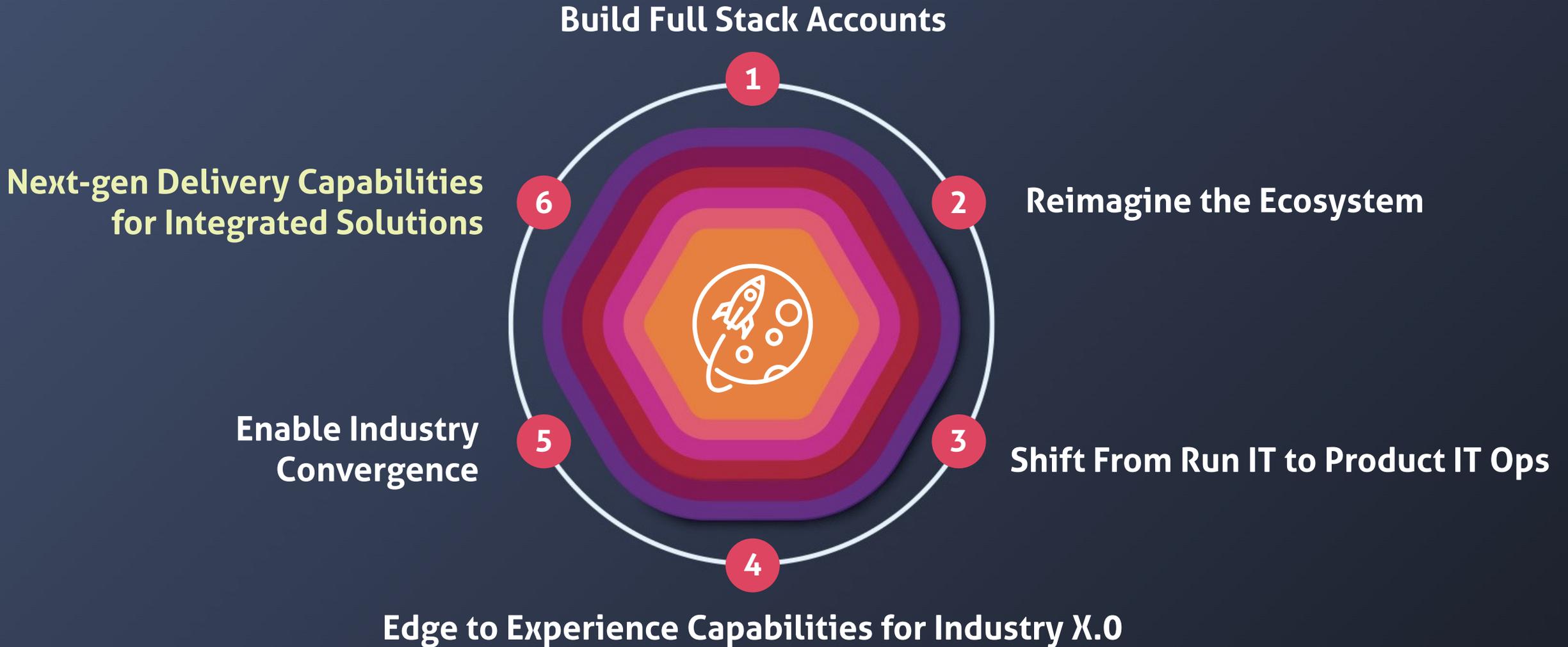
**Transforming Benefit Administration for a Global Supplementary Insurer**

**50 Million** Lives Globally  
**7 Million** Members (Employees)  
**470,000** Groups (Employers)  
**80,000+** Agents & Brokers

**Built and Evolving the Centralized Global Risk Management System for a Fortune 100 Cards & Payments Major**

**52** Markets, Daily review of Risk Assessment  
**Over 3 Billion** Risk Assessments Annually  
**Across 110 Million** Credit Card Clients

# Strategic Levers for FY23





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**Radhakrishnan  
Rajagopalan**

*Global Delivery Head—  
Technology Services*

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# Getting businesses to the future, *faster*

*Building Integrated Solution Capability  
for Future, Faster*

# Building Integrated Solution Capability for Future, *Faster*



## Strengthening **CAPABILITIES**

Deepening our partnerships across hyperscalers, incubating emerging technologies and investing on platforms to drive efficiencies at scale



## Autonomous **WORKFORCE**

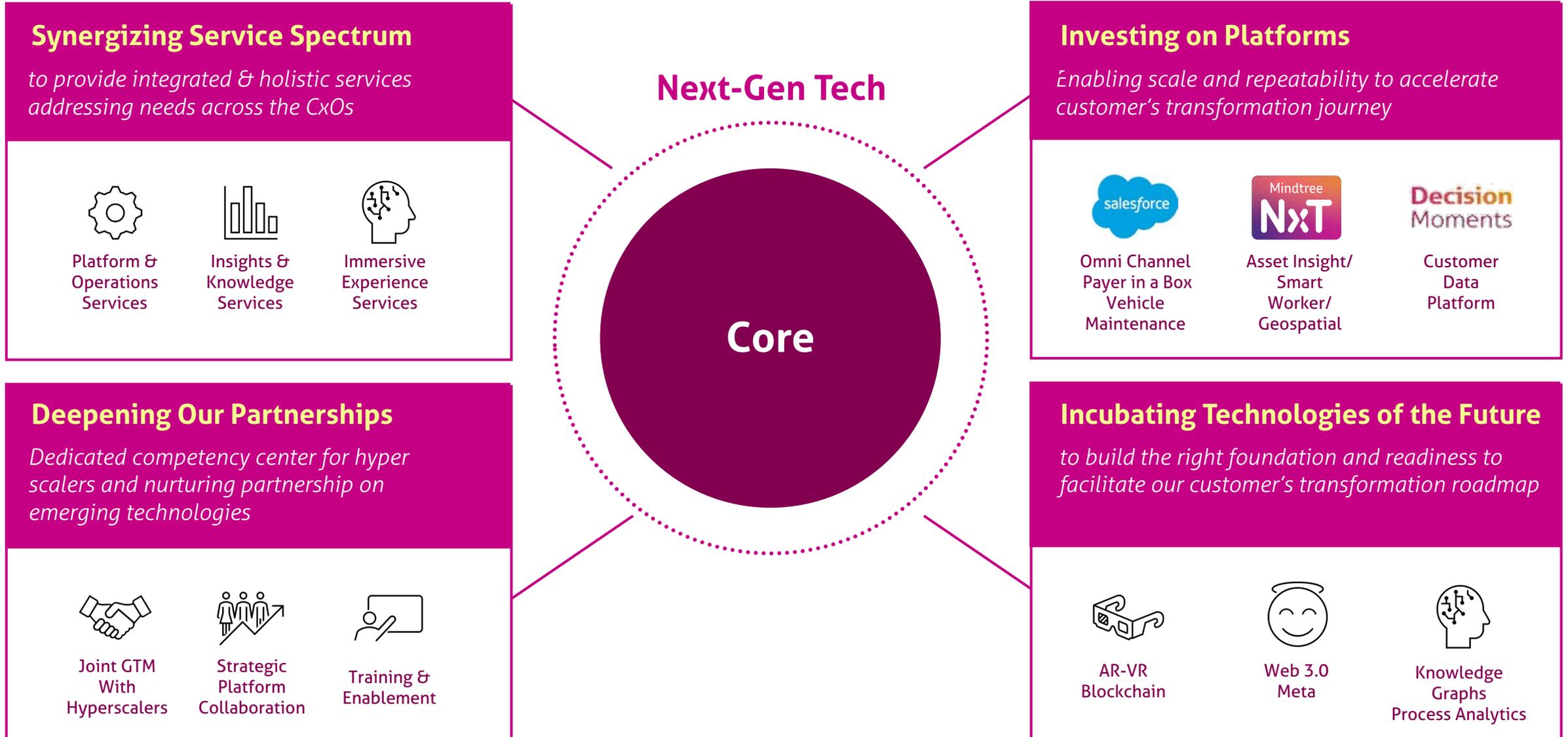
Right blend of human and digital workforce coupled with environment for continuous learning to create self-sufficient teams



## Synergizing **SERVICE DELIVERY**

Simplified & connected delivery construct for higher degree of collaboration and productivity to accelerate business outcome

# Strengthening Our Core and Embracing Next-gen Tech Capabilities



# Building An Autonomous Workforce



## VERSATILE WORKFORCE

- Focus on **full-stack developers** across hyperscalers
- Improved productivity through **automation & bot-based virtual assistants & advisers**



## IMMERSIVE

- **Simulation-based virtual training environment** for cross-skilling and upskilling
- **Partners led training** and certifications
- **Collaboration with academia** for creating industry-ready talent pool



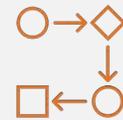
## ENGAGING

- **Hybrid and Nomadic workplace**—technology-driven, location-independent teams
- **Platforms for communities** to improve collaboration

# Synergized the Service Delivery



**Output / Outcome-based "As-a-service"**  
Next-gen Delivery Models



**Xops-centric Unified Service Delivery** for  
Continuous Business Value Amplification



**Offering-led Techno-functional Teams** to Drive  
Industry Solutions



**Integrated Service Delivery** to Drive 360° Digital  
Transformation

# Helping Clients Get to the Future, Faster

Enabling a **dual mandate** of **cost savings and revenue maximization**

