

September 13, 2022

BSE Limited

Corporate Service Department,
1st Floor, P. J. Towers,
Dalal Street,
Mumbai 400 001

Fax: (022) 2272 2039/2272 3121

Scrip ID: ZENSARTECH

Scrip Code: 504067

The National Stock Exchange of India Ltd.

Exchange Plaza, 3rd floor,
Plot No. C/1, 'G' block,
Bandra Kurla Complex, Bandra (E),
Mumbai 400 051

Fax: (022) 26598237/26598238

Symbol: ZENSARTECH

Series: EQ

Sub: Disclosure under Regulation 30 (6) of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

Dear Sir/Madam,

In continuation to our letter dated September 12, 2022, please find enclosed herewith the Investor's Presentation which will be made during RPG Annual Investor Conference 2022.

Kindly take the same on record.

Thanking you,

Yours faithfully,

For **Zensar Technologies Limited**

Gaurav Tongia
Company Secretary
Encl: As above



hello happiness

RPG Annual Investor Conference

Zensar Technologies Ltd.

September 14, 2022

Think Velocity

Disclaimer

This presentation may include statements which may constitute forward-looking statements. All statements that address expectations or projections about the future, including, but not limited to, statements about the strategy for growth, business development, market position, expenditures, and financial results, are forward looking statements. Forward looking statements are based on certain assumptions and expectations of future events. The Company cannot guarantee that these assumptions and expectations are accurate or will be realized. The actual results, performance or achievements, could thus differ materially from those projected in any such forward-looking statements.

The information contained in these materials has not been independently verified. None of the Company, its Directors, Promoter or affiliates, nor any of its or their respective employees, advisers or representatives or any other person accepts any responsibility or liability whatsoever, whether arising in tort, contract or otherwise, for any errors, omissions or inaccuracies in such information or opinions or for any loss, cost or damage suffered or incurred howsoever arising, directly or indirectly, from any use of this document or its contents or otherwise in connection with this document, and makes no representation or warranty, express or implied, for the contents of this document including its accuracy, fairness, completeness or verification or for any other statement made or purported to be made by any of them, or on behalf of them, and nothing in this document or at this presentation shall be relied upon as a promise or representation in this respect, whether as to the past or the future. The information and opinions contained in this presentation are current, and if not stated otherwise, as of the date of this presentation. The Company undertake no obligation to update or revise any information or the opinions expressed in this presentation as a result of new information, future events or otherwise. Any opinions or information expressed in this presentation are subject to change without notice.

This presentation does not constitute or form part of any offer or invitation or inducement to sell or issue, or any solicitation of any offer to purchase or subscribe for, any securities of Zensar Technologies Limited (the “Company”), nor shall it or any part of it or the fact of its distribution form the basis of, or be relied on in connection with, any contract or commitment, therefore. Any person/party intending to provide finance/invest in the shares/businesses of the Company shall do so after seeking their own professional advice and after carrying out their own due diligence procedure to ensure that they are making an informed decision. This presentation is strictly confidential and may not be copied or disseminated, in whole or in part, and in any manner or for any purpose. No person is authorized to give any information or to make any representation not contained in or inconsistent with this presentation and if given or made, such information or representation must not be relied upon as having been authorized by any person. Failure to comply with this restriction may constitute a violation of the applicable securities laws. The distribution of this document in certain jurisdictions may be restricted by law and persons into whose possession this presentation comes should inform themselves about and observe any such restrictions. By participating in this presentation or by accepting any copy of the slides presented, you agree to be bound by the foregoing limitations.

Zensar today

We are a digital-first, experience-led firm with full lifecycle capability—from design to implementation, data to infrastructure.



Strong culture

Solid capabilities and rich ethos



Continuous evolution with momentum

Service lines expanded; leadership strengthened



Experience-led engineering core

Integrated experience, design, engineering, data



Strong war chest

\$163.5M cash, zero debt



Five straight quarters of growth

Grew 26.3% YOY CC in Q1FY23



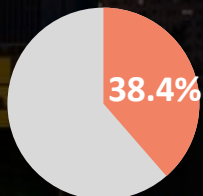
We have made significant strides since our strategy refresh



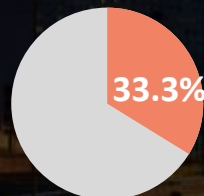
26.3%
Q1FY23 YoY CC
growth

Improved client mix

Top 5 clients



Q1FY22



Q1FY23



50+
new logos
in 5 quarters

2,047 net addition

Headcount

Q1FY22

9,512

Q1FY23

11,559



Strengthened engineering
and data capabilities

Revamped fresher program

1,600+ freshers in FY22

City of San Diego

\$122M deal win

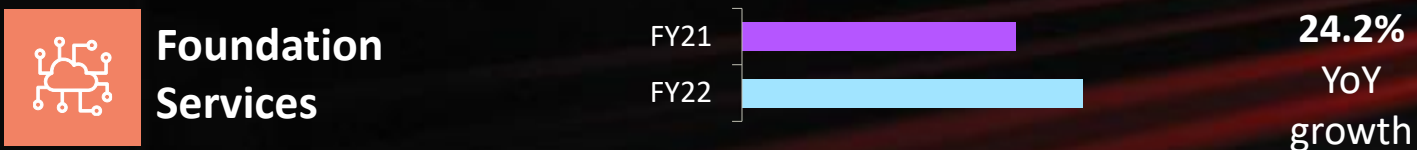
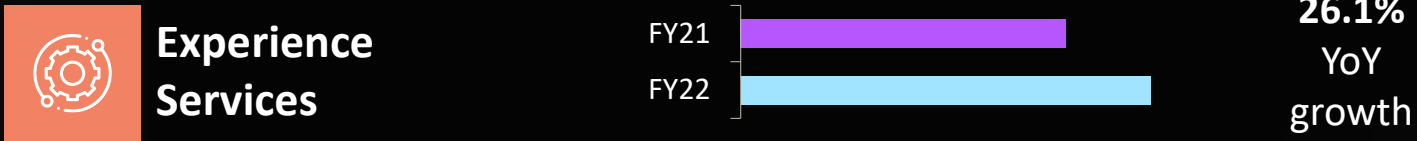
Renewed brand

First in 20 years

Expanded delivery

Kolkata and Columbia
added

Key service lines continue to expand



- / Experience-led engineering resonating strongly; multiple wins
- / Notable strides in digital and cloud engineering; footprint in most of our deals
- / Bolstered data engineering services; significant uptick in momentum
- / Multiple initiatives by Zenlabs in AI/ML, blockchain, quantum computing, Web3/metaverse
- / Strong traction in Salesforce across geographies
- / Multiple large deals in Foundation Services

Success across verticals and geographies

Vertical highlights



HTM

3.8%

Q1FY23 YoY growth cc

49.9%

FY22 revenue



BFSI

56.1%

Q1FY23 YoY growth cc

30.1%

FY22 revenue



CS

24.4%

Q1FY23 YoY growth cc

20%

FY22 revenue

Key updates

Steadied ship;
strong traction in
Emerging vertical

Consistent growth
momentum;
marquee logos
added

Leadership
augmented;
strong results

Geography highlights



USA

23.8%

Q1FY23 YoY growth cc

70.5%

FY22 revenue



UK/EU

39.8%

Q1FY23 YoY growth cc

18.0%

FY22 revenue



South Africa

21.3%

Q1FY23 YoY growth cc

11.5%

FY22 revenue

Key updates

Amplification in
BFSI and Consumer
Services

8 quarters of
consecutive
growth; expansion
in continental
Europe

Continued
momentum; strong
local brand



Some of our notable success stories

Case studies (1/2)



Digital experience transformation for a leading global broadcaster

- / Reimagined a household brand through visual and experience design
- / Linked product and services for a seamless user journey through high-fidelity design, animations, and layouts
- / Enhanced experience for millions of customers; increased conversion by 1.5%

Service line: Experience Services



Strategic partnership with a Fortune 500 insurance company

- / Modernized the product architecture by deconstructing monolithic applications into microservices
- / Hyper-personalized products and channels through user-friendly UI
- / Generated \$225M additional online revenue and reduced operational cost by 25%

Service line: Experience and Advanced Engg.



Full spectrum digital partner for a global payments and tech company

- / Implemented a new platform based on push technology for payments in a new API architecture
- / Reduced time spent creating new campaigns by 30% and go-to-market time by 40%

Service line: Advanced Engineering

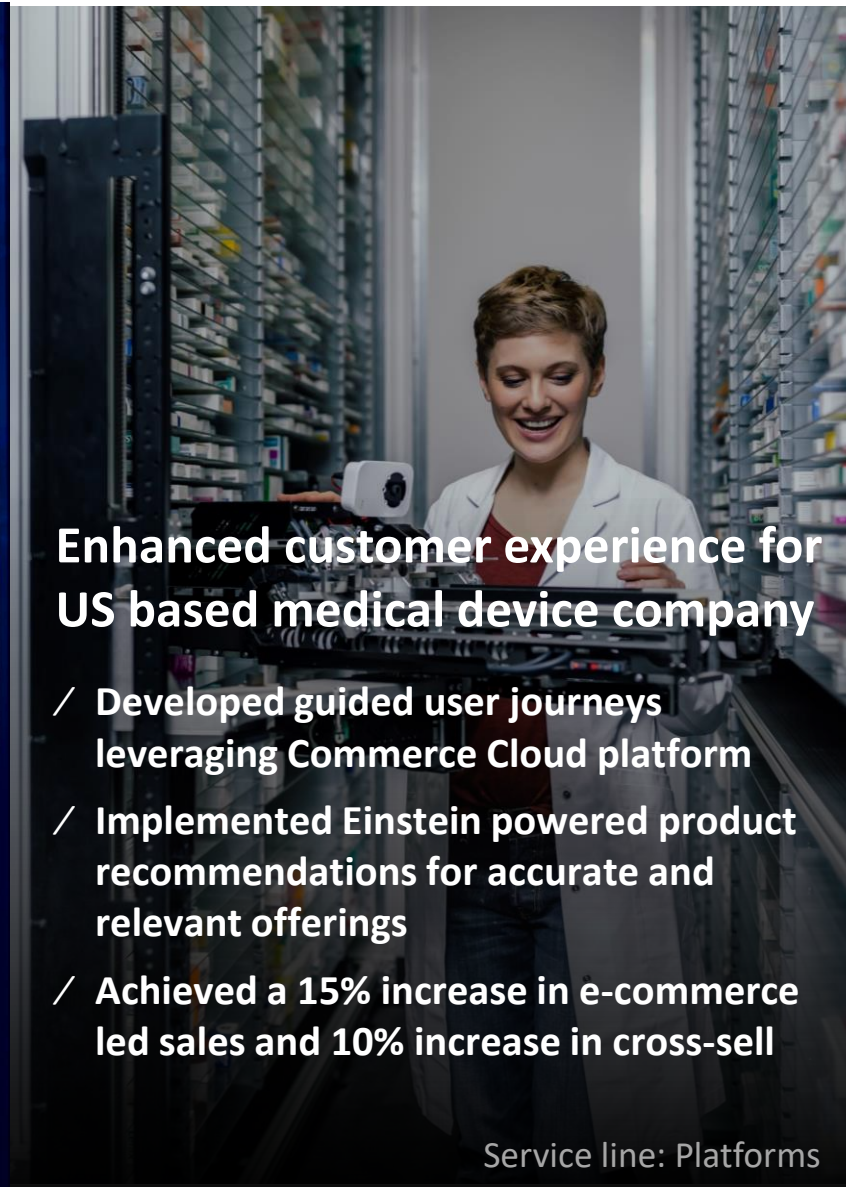
Case studies (2/2)



Automation of regulatory reports for a global financial services company

- ✓ Created data warehouse, added tool-agnostic layer, and designed a data quality scorecard for analysis
- ✓ Helped client collate 100+ data feeds and handle transaction volume of greater than \$100B per month

Service line: Data Engineering



Enhanced customer experience for US based medical device company

- ✓ Developed guided user journeys leveraging Commerce Cloud platform
- ✓ Implemented Einstein powered product recommendations for accurate and relevant offerings
- ✓ Achieved a 15% increase in e-commerce led sales and 10% increase in cross-sell

Service line: Platforms



End-to-End foundation services for City of San Diego

- ✓ Streamlined data, maintained secure systems, and guaranteed stable services between city departments
- ✓ Improved efficiency, lowered costs and safeguarded city and citizen's data
- ✓ Implemented "Digital Equity" platform providing highly accessible and free WiFi services across the city

Service line: Foundation services

We won multiple awards for continued excellence...



Platinum winner:
Branding Refresh and
Marketing Collateral (Calendar)

Gold winner:
Marketing Materials



The Vinci recognized for
AI-Powered Innovation
for Enterprise



Winning Edge in Digital
Transformation

The Drum.
Awards



UK Agency Awards: Digital Agency
of the Year, Design Agency of the
Year (Foolproof)

Drum Awards: Most Effective Use
of AR and VR (Foolproof)



Tech Company of the Year
2021



First runner-up:
UN Women Award for
Transparency and Reporting on
Gender Equality



2021 Artificial Intelligence
Breakthrough Award:
Best Use of Virtual Reality for
Retail Applications



Multiple awards for
digital and web-based
marketing (Indigo Slate)

...and were recognized for our customer-centric solutions

AVASANT

Innovator in Digital Workplace Services 2021 RadarView™

Disruptor in Oracle Cloud ERP Services 2021-2022 RadarView™

Disruptor in Banking Digital Services and Cybersecurity Services 2022

Disruptor in Digital Talent Capability RadarView™ 2021



Everest Group
PEAK
MATRIX

Major Contender and Star Performer in Digital Interactive Experience (UX) Services 2021

Major Contender and Star Performer in Artificial Intelligence Services Assessment 2021

Major Contender in Insurance Platforms IT Services Assessment 2021

60+ recognitions

from leading analysts

*
ISG®

Leader in Consulting for Digital Business – Solutions and Services (US) 2021

Leader in Future of Work Services and Solutions (US) 2021

Leader in Digital Supply Chain Transformation Services (US) 2021

Leader in Next-Gen Private/Hybrid Cloud – Data Center Services & Solutions, ISG Provider Lens Study (US) 2021

Gartner®

Featured in Hype Cycle for the Digital Workplace 2021

Featured in Magic Quadrant for Outsourced Digital Workplace Services 2022

Featured in the service providers list of Digital Commerce Vendor Guide 2021

Market trends, imperatives, and focus areas

Market trends

Strained talent supply chain
Focus on total experience
Democratization of data
Distributed digital enterprise
Highly connected future
Acceleration of disruptive technologies
Metaverse/Web3
Continued focus on cybersecurity
Slowdown in certain industry segments

Imperatives

Expand talent pool, transform skills at scale
Continue strengthening digital, cloud, and data engineering
Drive innovation and thought leadership in emerging technologies
Provide high-resolution services in experience-to-engineering-to-infrastructure
Drive speed and efficiency for clients
Invest in strategic partnerships to drive growth

Focus areas for Zensar

Experience and design services
Advanced engineering and cloud engineering services
Data engineering, analytics
Applications and platforms
Foundation and infrastructure services

Recap of our strategy

We have
crystallized our
offerings into
service lines

5

Experience
Advanced Engineering
Data Engineering
Applications + Platforms
Foundation Services

Supported by 21 playbooks

Supported by
pillars of
execution

4

Sales
Talent
Partnerships
M&A

Across
industry
verticals

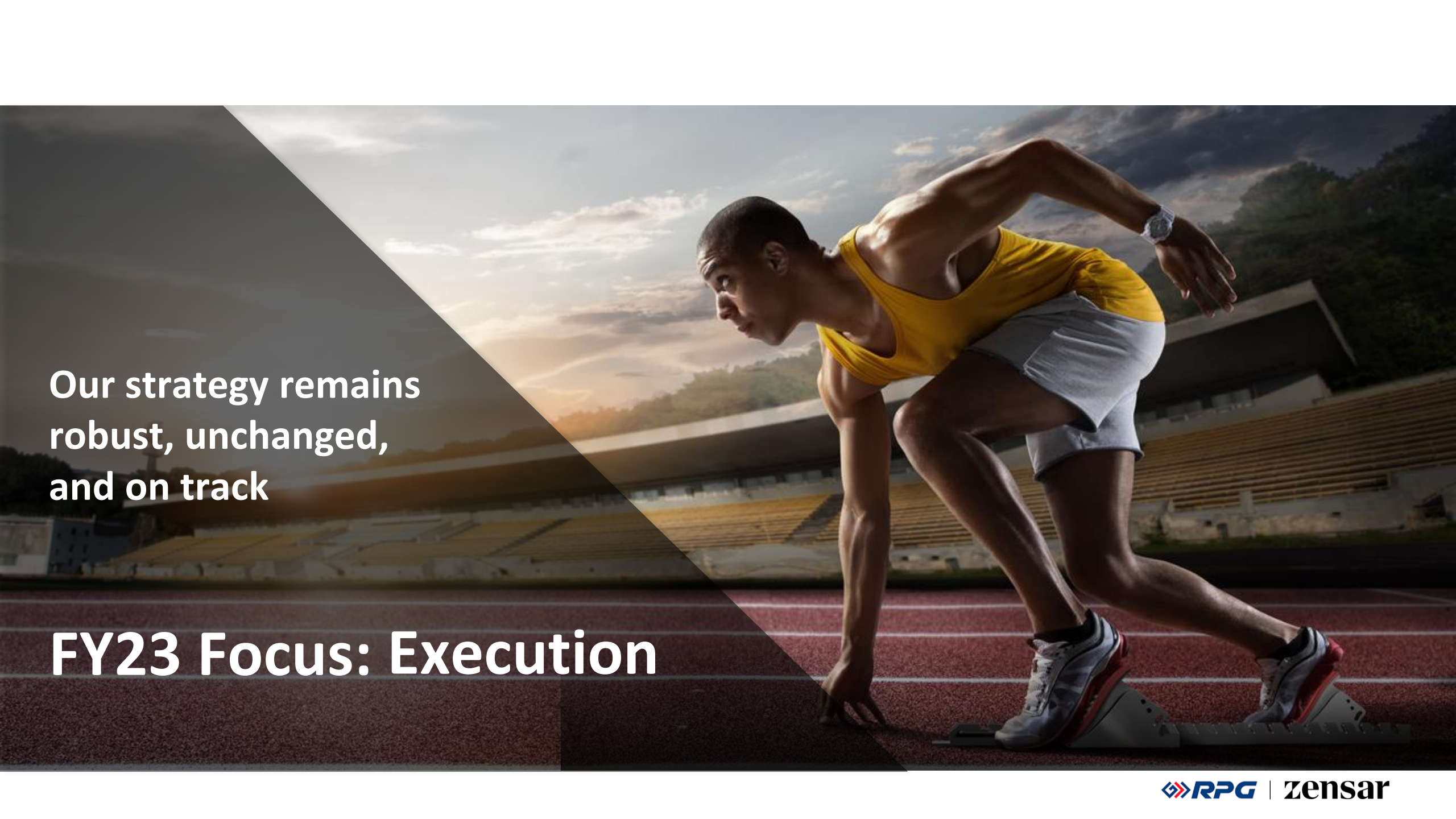
3

Hi-Tech/Manufacturing
BFSI
Consumer Services

In
geographies

3

North America
UK/EU
South Africa



Our strategy remains
robust, unchanged,
and on track

FY23 Focus: Execution

Our path forward

We will continue our intensified focus on execution to drive **resilience in our business and create headroom for growth**



Client experience transformation



Thrust on margin improvement



Tuck-in acquisitions to augment services and vertical capabilities



Continued push on talent transformation



Multi-service line solutions targeting industry-specific needs



Sustained focus on growth resilience

1 Improve service mix

2 Improve commercials

3 Improve utilization

4 Optimize pyramid

5 Optimize support costs

6 Optimize cost of talent acquisition

1 Expanded talent reach, accelerated fresher program

2 Large-scale skill transformation

3 Connectedness/engagement

4 Expanded delivery footprint

ESG goals and commitments



Environment

Carbon Emissions

Net-zero GHG emissions by FY40

Energy Consumption

50% reduction in Energy Performance Index by FY30

Waste and Water Mgmt

By FY25 for owned premises:

- / Water positive
- / Zero water discharge
- / Zero waste to landfills



Social

Happiness

Increase Happiness Index Score to 82 by FY25

Diversity and Inclusion

Creating a gender-diverse workplace with 35% women associates by FY27

Corporate Social Responsibility

Reach 225,000 lives through community development initiatives by FY30

Human Resources Development

Achieve 80 average hours of training per associate by FY30



Governance

Governance and Compliance

- / Code of conduct training compliance @ 100%
- / Strong ombudsman process

Procurement and Supplier Diversity

Assess all suppliers based on sustainable procurement criteria by FY30

Data Security and Privacy

Commitment to data privacy compliance



hello happiness

Thank you