

September 20, 2021

**National Stock Exchange of India Limited**

Exchange Plaza, 5<sup>th</sup> Floor,  
Plot No. C-1, G Block,  
Bandra Kurla Complex, Bandra (East)  
Mumbai - 400 051.

**BSE Limited**

Phirozee Jeejeebhoy Towers,  
Dalal Street,  
Mumbai - 400 001.

**Sub: Outcome of Analyst/ Institutional Investor Meeting**

**Ref.: Scrip ID - STLTECH/ Scrip Code – 532374**

Dear Sir/Madam,

Pursuant to Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, we wish to inform you the outcome of Investor Meet held as detailed below :-

| Date               | Name of the analyst / Institutional Investor                       | Venue of the Meeting | Type of the Meeting |
|--------------------|--|----------------------|---------------------|
| September 20, 2021 | Virtual meeting with<br>Nirmal Bang Equities Pvt. Ltd. and Clients | Virtual Meeting      | Group Meeting       |

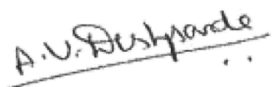
The Company's presentation in this regard is attached herewith.

Kindly take the above on your record & acknowledge the receipt.

Thanking you,

Yours faithfully,

For **Sterlite Technologies Limited**



**Amit Deshpande**

Company Secretary & Corporate General Counsel (ACS 17551)

STL

stl.tech

# Investor Presentation

*Sep.'21*



# Safe Harbour



Certain words and statements in this communication concerning Sterlite Technologies Limited (“the Company”) and its prospects, and other statements relating to the Company’s expected financial position, business strategy, the future development of the Company’s operations and the general economy in India & global markets, are forward-looking statements.

Such statements involve known and unknown risks, uncertainties and other factors, which may cause actual results, performance or achievements of the Company, or industry results, to differ materially from those expressed or implied by such forward-looking statements.

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# Company Overview



**Company  
overview**

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Digital network  
growth Story

2  
STL's  
unique proposition

3  
Future  
growth levers

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Annexure

# We Integrate Digital Networks for Our Customers

Core Business

Customer Segments



Telcos



Cloud Companies



Citizen Networks



Large Enterprises

End-to-End Solutions



Optical Connectivity



Wireless Solution

  
One Solution. Countless Opportunities

FTTx Network Integration

Portfolio Offerings



Optical Interconnect Products

- Glass Preform
- Optical Fibre
- Optical and Specialty Cables
- Optical Interconnect Kits



Virtualised Access Products

- Programmable FTTx
- Virtualised RAN
- RAN Intelligent Controller Network Orchestrator



Network Software Products

- Digital BSS Platforms
- Network Operations Platforms

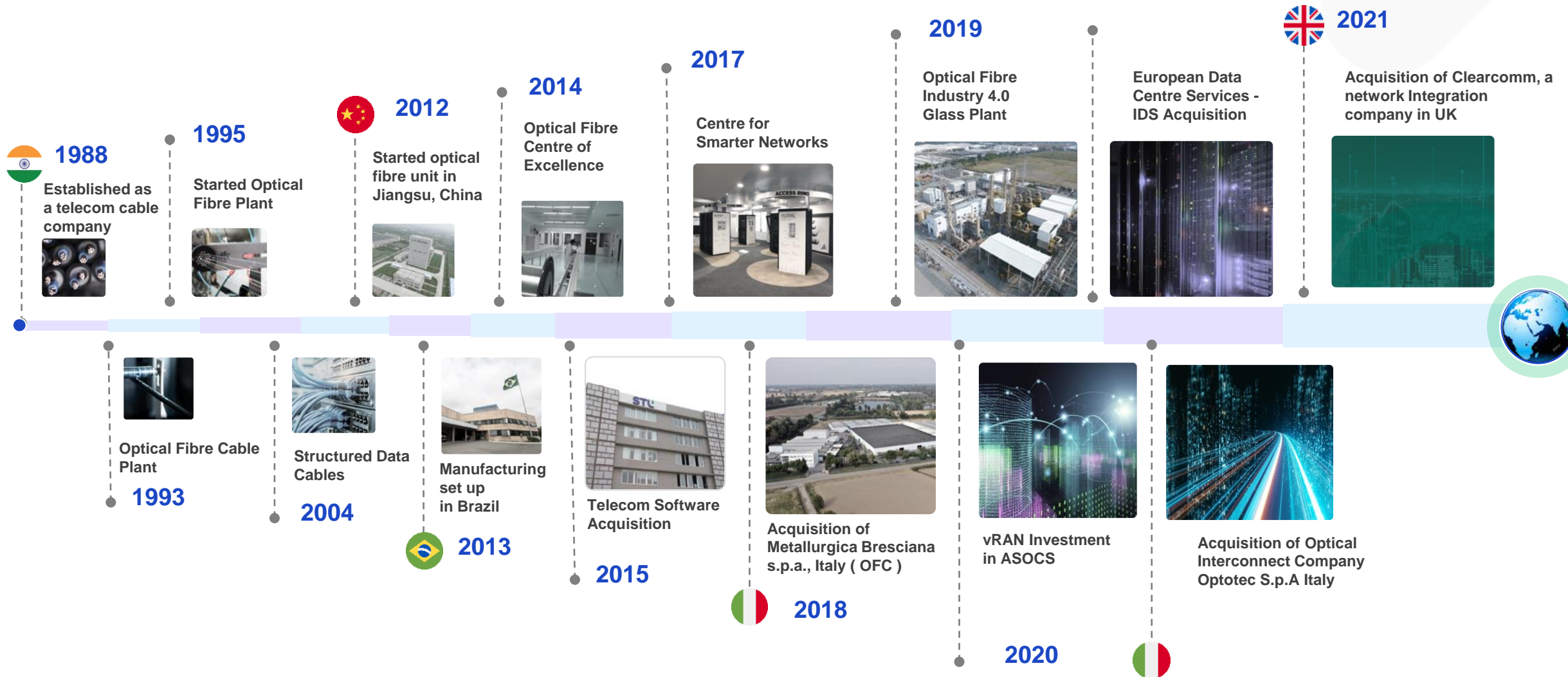


System Integration Services

- Network Design Services
- Network Integration Services
- Network O&M Services
- Data Centre Network
- Private Enterprise Network

Unique Capabilities

# With a strong legacy and global capabilities



# Our company in numbers



**Rs. 48.25 bn.**

## FY21 Revenue

India (56%), EMEA (37%),  
America (4%), China (1%), RoW (2%)

**8**

## Global production facilities

50M fkm optical fibre capacity

**2**

## Software Development Centre

**4**

## Innovation centres

## India and UK

System Integration Services



**582**

## Patents

Across the network layers

**Zero**

## Waste to Landfill

Shendra, Rakholi, Dadra

**30+**

## Nationalities

~3,100 Employees

# Driven by our purpose to transform millions of lives



## TRANSFORMING LIVES

**1.64 mn+**  
lives impacted

**3,500+**  
Rural women  
empowered

**1,400+**  
Individuals digitally  
empowered

**50**  
ESG awards, including 7  
global, won



### World's 1<sup>st</sup> ZWL Certified

**135,000+ MT**  
Waste diverted from landfills

**97%**  
Waste recycled and reused

**800+ MT**  
Plastic saved through innovative packaging

**3R**  
Approach to reduce, reuse, recycle



### Committed towards UN\*\* Goals

**100%**  
Manufacturing locations to be ZWL certified  
Water positivity globally  
Sustainable Sourcing

**50%, 7,500+ tCO2e**  
Reduction in carbon footprint

**1.15M+ m3**  
Water recycled and reused at STL and  
replenished in surrounding communities



### Strong internal governance

**57% Global Advisory Council**  
led by transformative technology leaders

**25% diversity**  
in Independent Directors

**Two of the Big Four**  
as statutory & internal auditors

Executive and management committees for  
each business in place



### Targeting 5 mn by 2025

- Impacting 5 mn lives
- Undertaking 5 mn plantations
- Replenishing 5 mn cubic meters of water in communities



# With a strong board and leadership team



## Independent Directors



### Kumud Srinivasan

*(Non-Executive & Independent Director)*

- VP and Director of Non-Volatile Fab Manufacturing and Automation Systems at Intel Corporation
- Has spent 30 years at Intel in US, leading multiple global functions, prominent ones being R&D for technology manufacturing, industrial automation and IoT for manufacturing facilities
- Served as the President of Intel India from 2012 to 2016



### Sandip Das

*(Non-Executive & Independent Director)*

- One of Asia's most respected telecommunications professionals and an acclaimed Chief Executive
- Ex-MD of Reliance Jio, Group-CEO, Maxis Communications and Hutchison Essar Telecom (now Vodafone), India
- One of the founding members of private telephony in India and a part of the group of individuals that founded Hutchison Max Telecom in 1994



### S. Madhavan

*(Non-Executive & Independent Director)*

- Fellow member of institute of chartered accountants of India
- Holds directorial positions in top listed companies like HCL technologies, ICICI Bank, UFO Moviez and Transport Corporation of India
- Had set up a successful indirect tax practice, which got merged with PWC.
- Held leadership positions for over 14 years at PWC and was instrumental in leading tax practice



### B. J Arun

*(Non-Executive & Independent Director)*

- Founded and led multiple successful ventures in silicon valley including California Digital, a Linux-based HPC leader and Librato, a software company
- Ex CEO of July Systems - a location-based mobile management platform
- Currently the Vice President of Tie Global
- Remains dedicated to fostering entrepreneurship in technology community

# Digital Network Growth Story



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**Digital network growth story**

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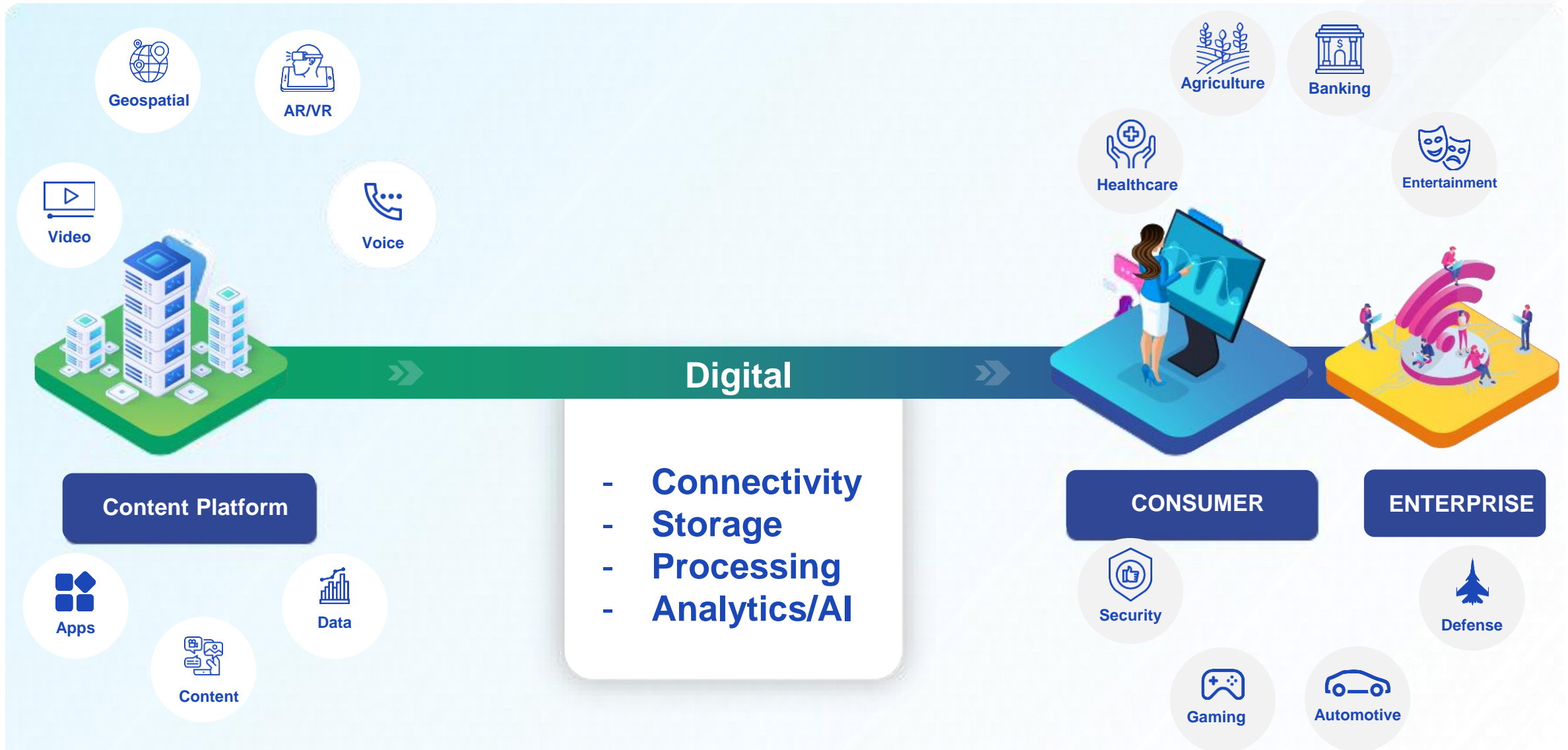
Q1 FY'22 updates

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STL financials

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# Industry evolution from Telecom to Digital



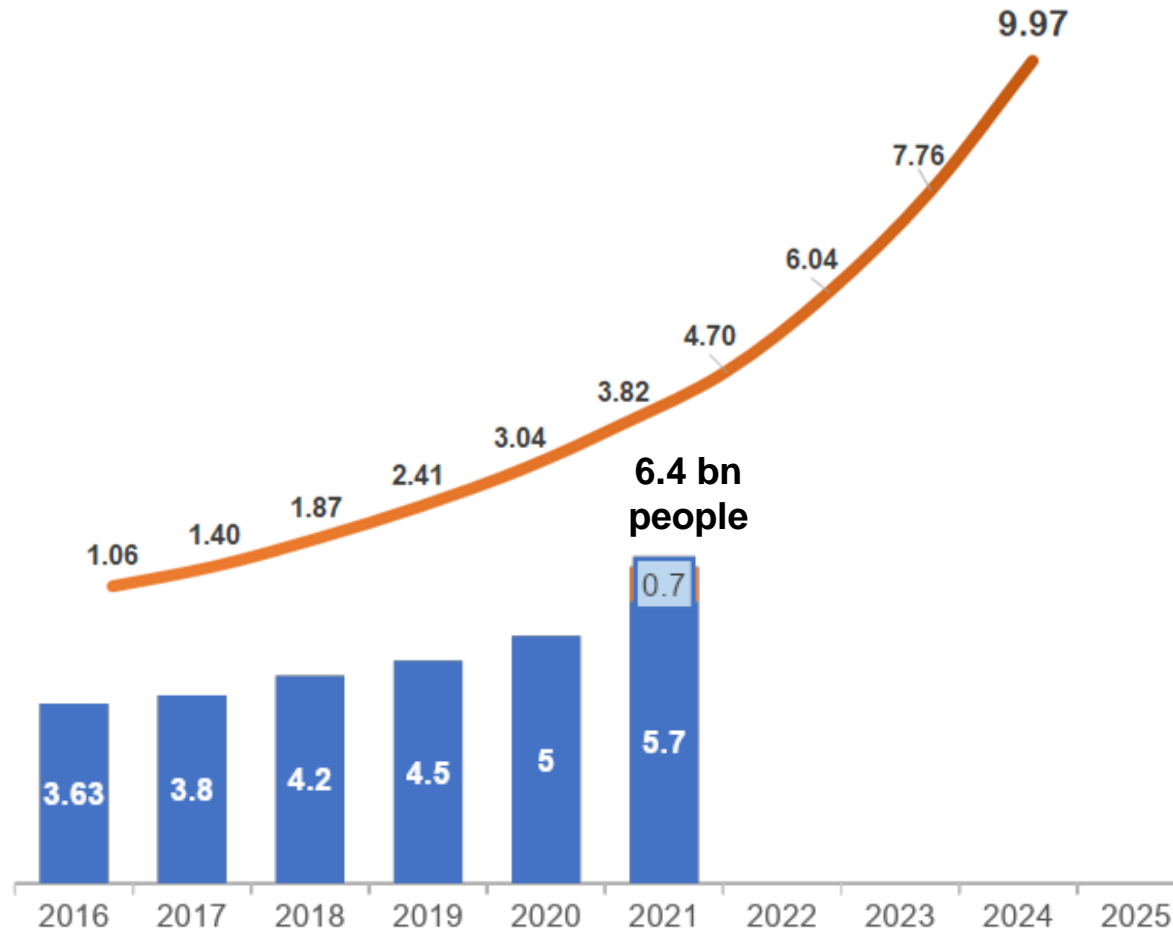
# Leading to acceleration of digital connectivity

## Internet users

In billions of people

## Global IP Traffic

in Zettabytes



Source: Cisco for Global IP traffic

Source : Internet World Stats, for Internet users

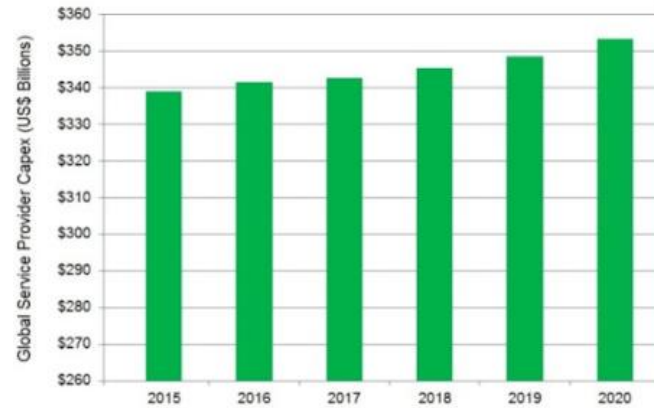
- **2.2 mn new users everyday** came online since 2020
  - 3X the adoption rate vs. before
  - In 2015-18, 0.7 mn users came online everyday
- **Global IP traffic will grow 3X** in the next 3-4 years

# With increased capital, including from new investor groups



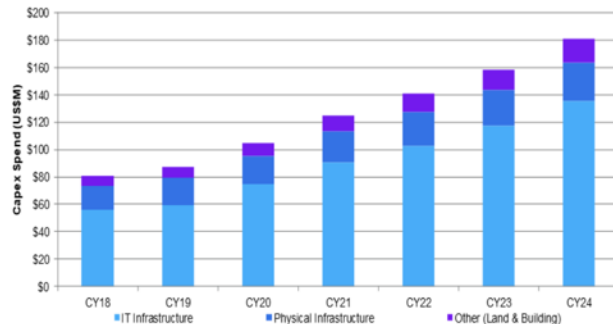
## Telcos and Cloud companies are increasing their CapEx

### Telcos



Much higher capex in 2021 and beyond

### Cloud



amazon and Microsoft announce global Data centres expansions

Source: Omdia © 2020 Omdia

Data centre capex forecast by equipment category

## New capital is coming from PE funds, Governments and Enterprises

### Private Equity



### Enterprises



Audi, Ford, BASF invest in private 5G

### Citizen Networks



allocates \$9.2 bn for RDOF

- UK invests \$6.9 bn
- India lays out \$ 2.4 bn
- US to spend \$65 bn to “future-proof” connectivity

# And new technologies becoming mainstream

## 5G takes center-stage

Fastest technology to reach **400** mn users, **173 5G commercial networks**, **630 kinds of 5G handsets**

## FTTx connects many endpoints

Fibre to the x:

- Home
- Enterprise
- Tower
- Curb

## O-RAN becomes mainstream

**Major operators** start **trials or deployments**, including Verizon, Etisalat, DT, Orange, Telefónica, Vodafone, Airtel and more

## Industry experts also recognise the shift

- **5G Subscribers base** is expected to hit 4.4 bn. by 2026
- **In Europe, FTTH/B subscribers** is expected to double in next 6 years to 208 mn
- **Analysys Mason** expects 82% of CSPs to support open interfaces/multi-vendor RAN

# 5G, FTTx and rural connectivity are driving up the fibre demand

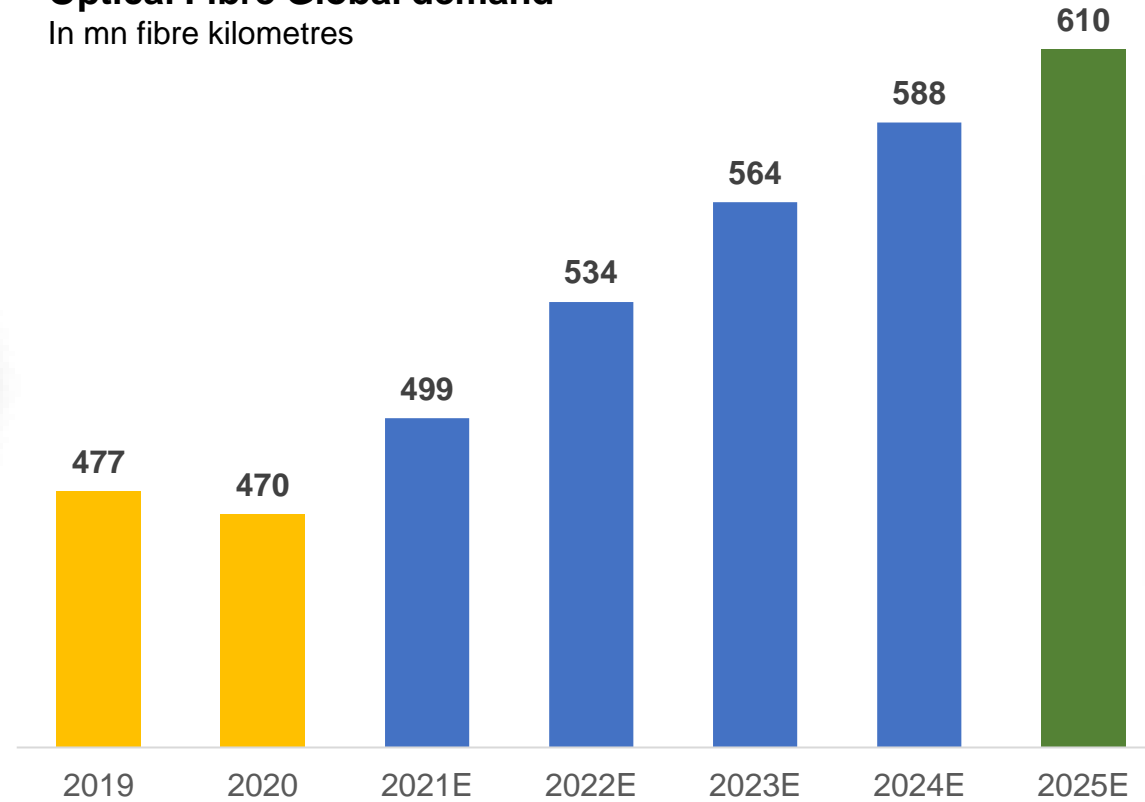


5G

FTTx

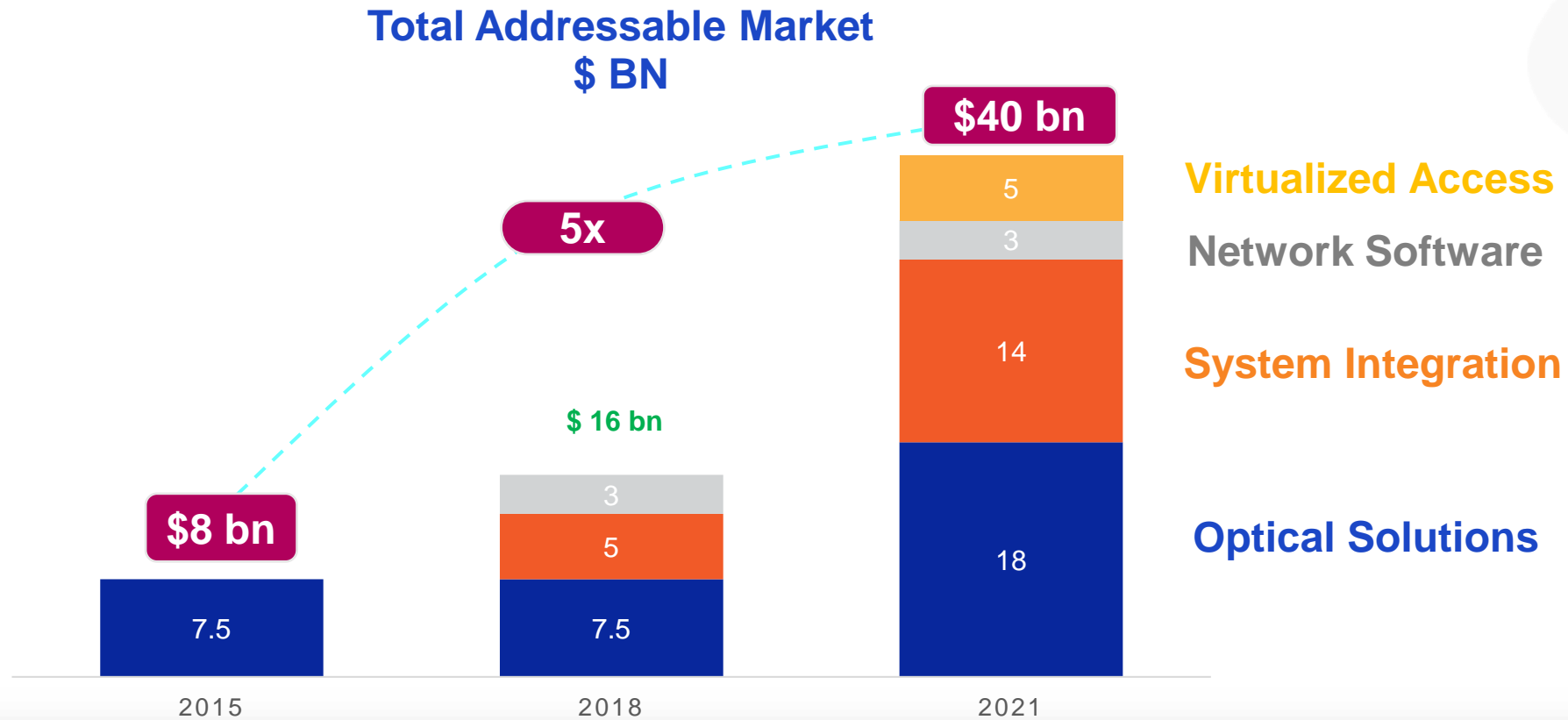
Rural  
connectivity

**Optical Fibre Global demand**  
In mn fibre kilometres



**A decade-long  
digital network  
creation cycle  
is here!**

# With an increased TAM, we are well poised to lead this decade of network creation



***5x increase in TAM over the last 5 years***  
***Now focused on increasing market share of the higher TAM***



# STL's Unique Proposition

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# 25 years of experience in optical connectivity

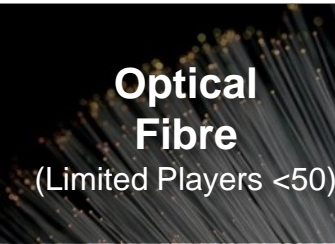
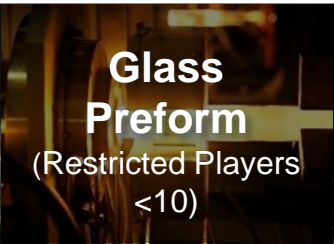


## Optical Fibre

## Optical Fibre Cable

## Optical Interconnect

## pFTTx



**STL's unique manufacturing capabilities with complete vertical integration**  
**One of the top 3 integrated fibre producers in the world**

**8**

GLOBAL  
PRODUCTION  
FACILITIES\*

**50 mn**

FKM OPTICAL  
FIBRE  
CAPACITY

**42 mn\***

FKM OPTICAL  
FIBRE CABLE  
CAPACITY

### Industry 4.0 standards

Fully automated machinery with robotic operations

### Efficient supply chain

Reduced delivery times and SCM cost

**\* Plan to reach by 2022**

# Large Scale System Integration expertise

**Nationwide  
NETWORK MODERNISATION  
for Indian Navy**



**LONG HAUL FIBRE NETWORK  
for India's largest telco**



**RURAL CONNECTIVITY  
for states under BharatNet**



**URBAN USE CASES  
for smart + safe cities**



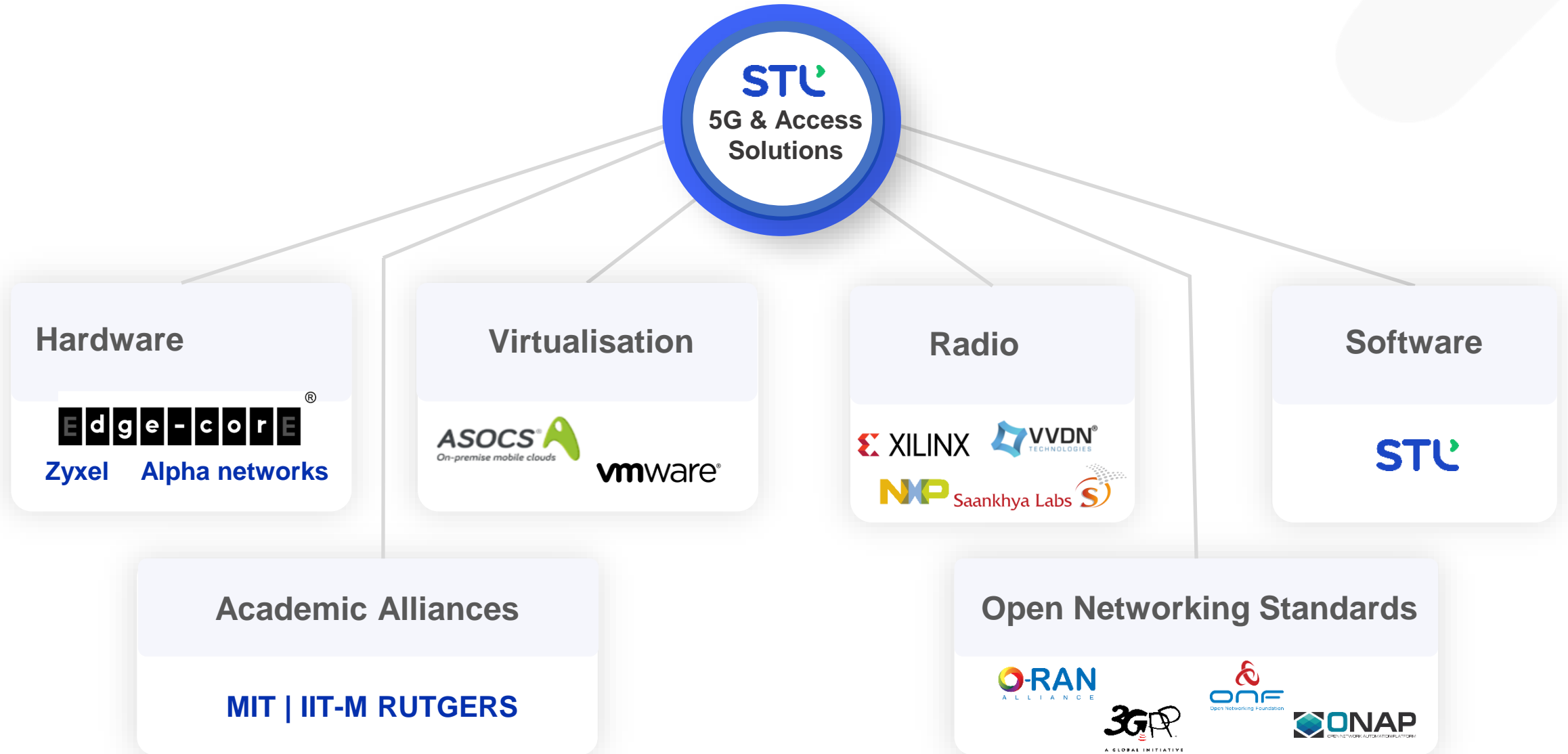
**IN CITY FTTX DEPLOYMENT  
for India's telco & UK Gigabit  
network**



**DATA CENTER INTERCONNECT  
for top hyperscalers**



# Robust ecosystem of virtualised access technologies



# Put together, an E2E capability to integrate future digital networks



**LARGE SCALE NETWORKS  
SYSTEM INTEGRATION**

**10 Years Network Design & Integration Solutions**

**OPTICAL  
INTERCONNECT**



**25 years**

Extraordinary track record  
Globally respected

**VIRTUALIZED  
WIRELESS  
(SOFTWARE, CLOUD)**



**5 years**

Strategic alliances and  
product development



**Digital Network  
Integrator**

Close to the Edge

**EDGE**

Seamless Wired & Wireless

**CONVERGED**

Enhanced Experience

**COMPUTE**

Agile, Scalable, Agnostic

**DISAGGREGATED**

**At the Edge**

**Optical**

&

**Radio**

**Connectivity**

&

**Compute**

**Hardware**

&

**Software**

**STL integrates the  
technologies  
required for the  
new-gen digital  
network**

# Future Growth Levers



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# Three focused levers for growth



Services

2

## Globalise

Take System Integration business global and scale in India



Software

1

## Grow

Optical business



3

## Build

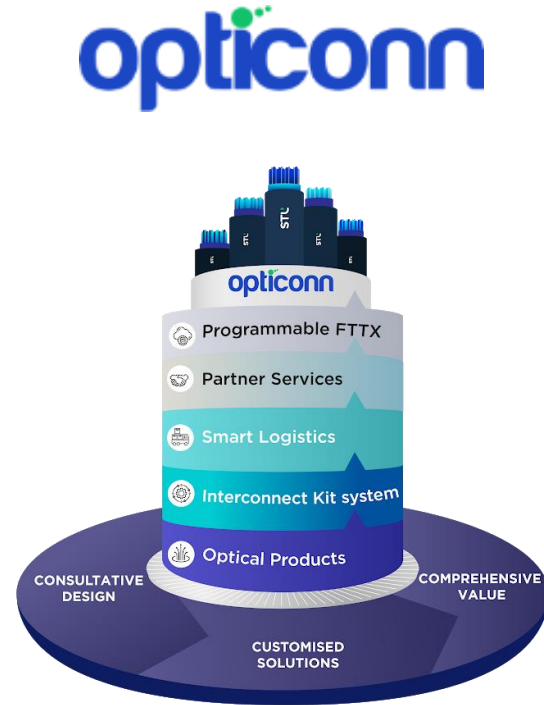
Strong Access Solutions business



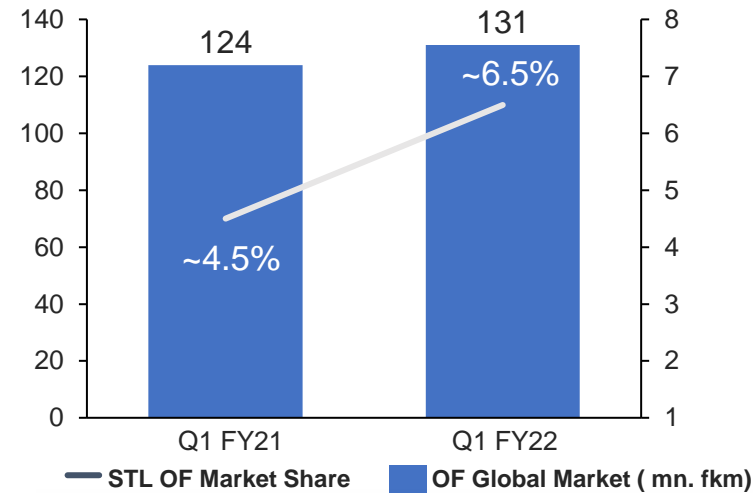
Hardware

# Grow Optical Business

## Continued growth in Opticonn market share



End-to-end optical solutions from STL



- STL's market share grew to **~6.5%**
- Industry optical fibre volume grew by **6.3% YoY** to **131 mn fkm**



- STL recorded **double digit revenue** growth in **optical interconnect** business
- **Opticonn** penetration has **increased**



# Globalise System Integration Business

## First order in the UK

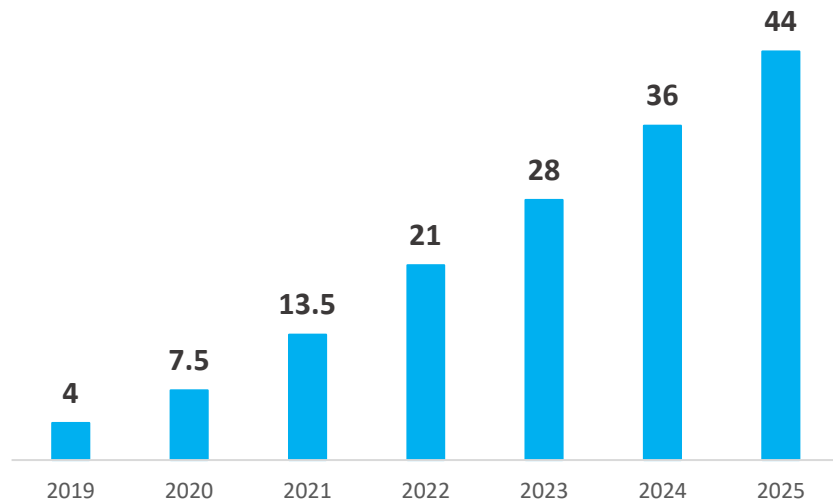


### The UK Market is growing

**£5Bn** *Project gigabit announced*



### Planned home passes in UK (Mn)



### We are capitalising on it

*Our first win*



**£12M**

- Partnership with a leading provider of telecom solutions in the UK
- FTTx mantra to connect homes with broadband in London
- Project expected to be completed in the current fiscal year

# Globalise System Integration Business

## Acquisition of Clearcomm, a network specialist in UK



### Clearcomm - an overview

- Provider of end-to-end optical network integration services to telcos in the UK
- Long-standing relationships with marquee customers and suppliers
- A decade of strong presence

### Financial profile and key facts

|                                  |                           |
|----------------------------------|---------------------------|
| <b>~£20Mn</b><br>Revenue (FY20*) | <b>26%</b><br>3-Year CAGR |
| <b>~50</b><br>Employees          | <b>UK</b><br>Headquarters |

\* Financial year ending in November

### Rationale for acquisition

| STL   |   | Clearcomm  |
|---|---|--|
| <ul style="list-style-type: none"> <li>• Optical Connectivity and Network Design expertise</li> </ul> | + | <ul style="list-style-type: none"> <li>• End-to-end Network integration in the UK</li> </ul>           |
| <ul style="list-style-type: none"> <li>• Data Centre Interconnect Capability</li> </ul>               |   | <ul style="list-style-type: none"> <li>• Fttx Integration Capability</li> </ul>                        |
| <ul style="list-style-type: none"> <li>• Access to large global customers</li> </ul>                  |   | <ul style="list-style-type: none"> <li>• Diversified Vendor base and experienced local team</li> </ul> |

### Deal contours

|                         |  |
|-------------------------|--|
| <b>Enterprise Value</b> | First tranche to be acquired at EV of ~ £15.5 mn, representing 100% of share capital     |
| <b>Structure</b>        | 80% of share capital to be acquired in first tranche. Balance 20% to be acquired in 2023 |
| <b>Financing</b>        | Mix of internal accruals and debt  |

**Solid platform to grow the System Integration business in the UK**

# Build Access Solutions

## Successful pilot with Chunghwa; Collaboration with Facebook Connectivity



- Successfully **completed a proof-of-concept** for programmable FTTx software solutions
- OLT software stack to **enable Chunghwa to upgrade** its GPON to XGS-PON



**FACEBOOK  
CONNECTIVITY**

- Collaborating to **co-develop general purpose radio units under Evenstar Program**
- STL aims to strengthen its **product development, promotion and supply chain** through this collaboration

**Developing radio unit manufacturing ecosystem in India**

**Recognized first revenue for Access Solutions in Q1FY'22**

# Q1 FY'22 Updates



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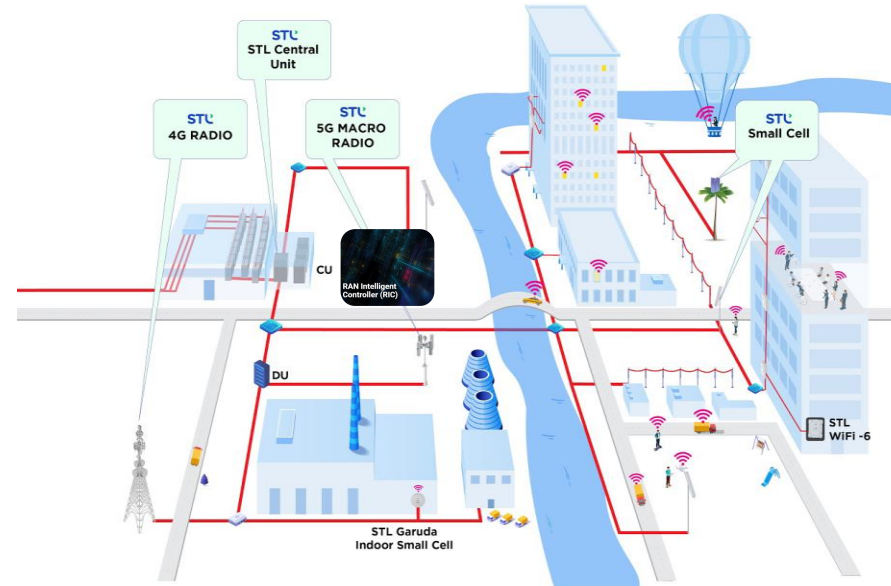
# Launched an end-to-end access solution: Accellus



Technology led E2E Solutions 



A wireless solution that bring together micro, macro radio, intelligent controller and orchestrator across CU, DU, RU



Global recognition

- A leading **5G RAN vendor**
- An **Enabler** for enhanced partner ecosystem support in **Digital Marketplace**



- **Top 60 Edge computing companies** to watch in 2021
- **Top 10 RAN vendors** to watch out for in 2021



- **Top 100 Tech Challenger**

# Our key account focus is leading to multi-portfolio engagements



## Enhanced engagements with current and new accounts resulting in strategic wins

### Nurtured existing key accounts



**openreach**  
a BT Group business


Multi-year strategic partnership to help build new UK full-fiber network



**airtel**

Multi-year LOI for fiber roll out across 10 circles

### Opened doors to new



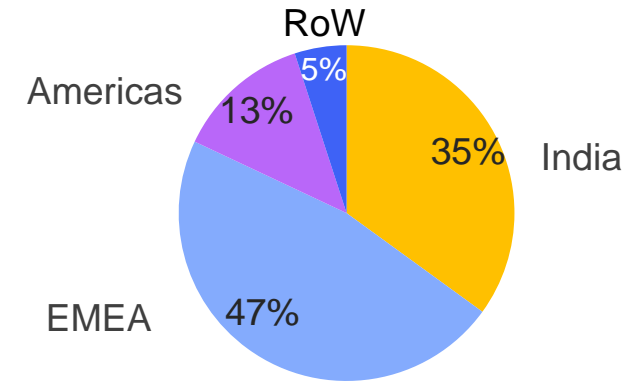
Five year, multi-million contract for dual-band and tri-band radio units




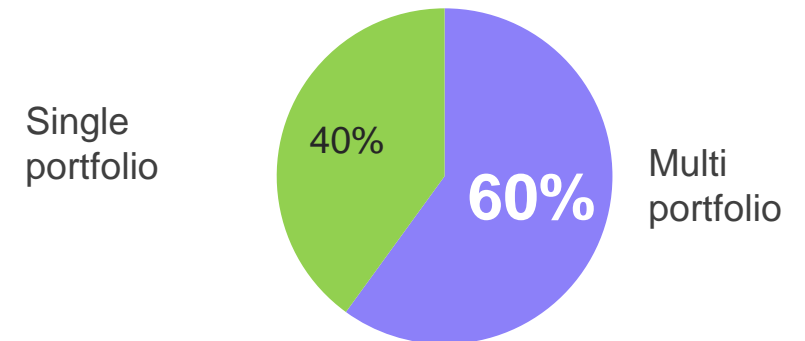
Digital transformation for a leading telco in Africa


## Increase in participation across Geos with multi-portfolio engagements



### Open participation funnel by region (%)



### Portfolio engagements in key accounts (%)



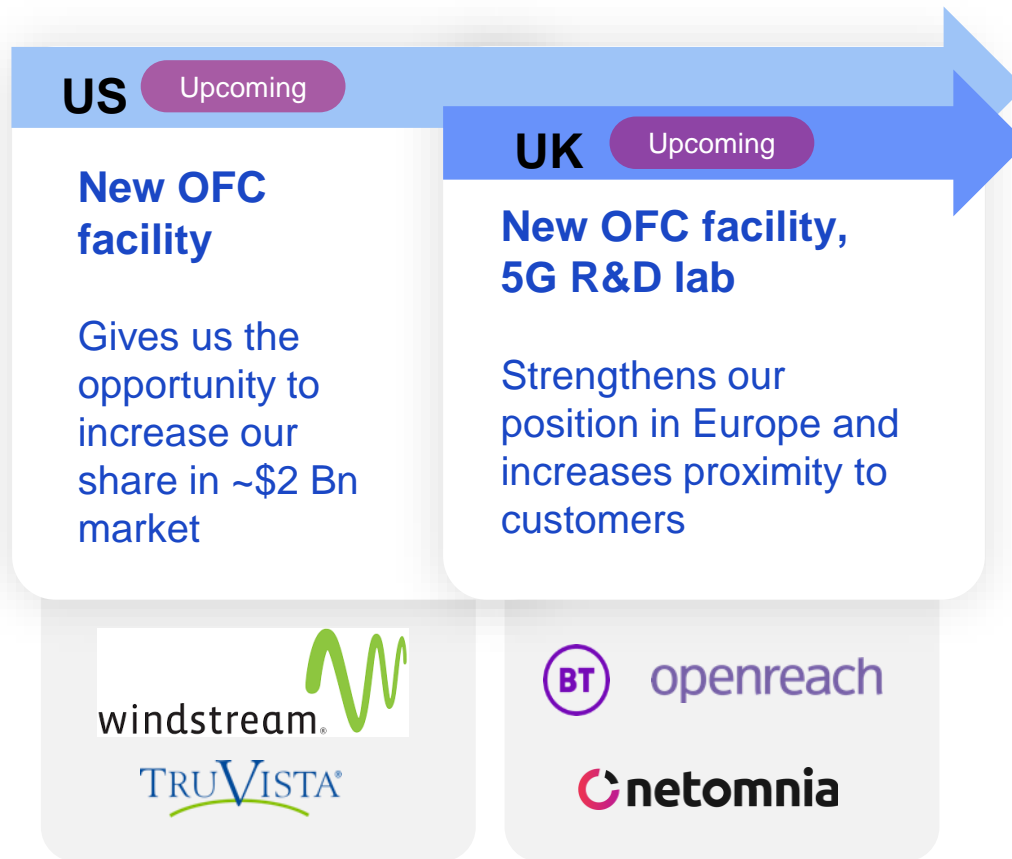
Key Account Management 



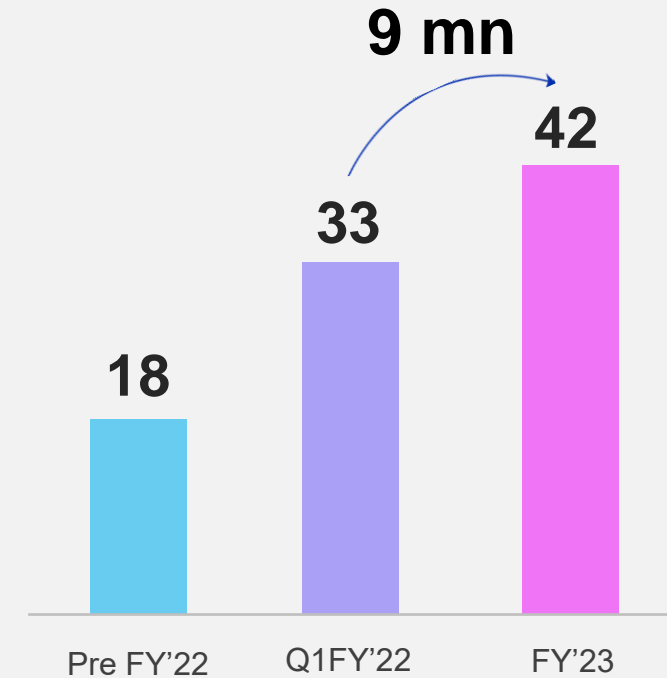
# Expanding optical capacity to 42 mn. fkm.



## Solution Centres at global locations with an investment of Rs. 2 bn.



## Demand driven expansion (Mn. fKm.)



Alliances & Investments 



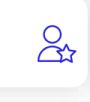
# Increased investments in R&D to develop end to end solutions



## New solutions with an annual R&D investment of 3-4% of STL revenue



**Alliances & Investments**



### Wi-Fi6 Access Solution

An outdoor Wi-Fi 6 radio unit providing carrier-class connectivity in dense environments

**Delivered**



### 5G Multi-Band Radio

Comprehensive Open RAN (Radio Access Network) radio portfolio with indoor small cell and outdoor Macro radio units

**Launched**



### Garuda

O-RAN compliant, highly power efficient indoor 5G small cell solution

**Launched**



### pFTTx

An SDN, cloud-native solution that brings programmability to last mile networks

**Pilot**



### RAN Intelligent Controller (RIC)

RAN Intelligent Controller used to optimize the RAN ecosystem using 3<sup>rd</sup> party xApps/rApps

**Development**



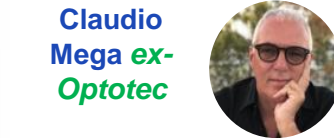
# With a strong global leadership team to drive next phase of growth



**Chris Rice**  
ex-AT&T



**Stephen Szymanski**  
ex-Prysmian



**Claudio Mega**  
ex-Optotec



**Keith Rowley**  
ex-Flomatic



**Sandeep Girotra**  
ex-Nokia



**Sandeep Dhingra**  
ex-Cisco



**Srinivas Jagdeesan**  
ex-Altran



**Jitendra Balakrishnan**  
ex-Corning



**Rajesh Gangadhar**  
ex-Sprint

**Virtualised Access**  
**200+**

**Optical Interconnect**  
**90+**

**System Integration**  
**50+**

Global team members

Leaders & Experts

Technologists

Top Talent & Culture



# STL Financials



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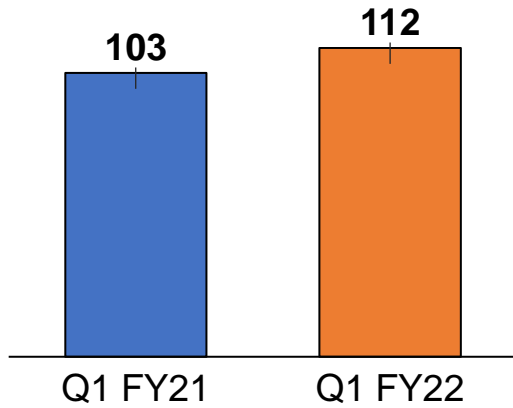
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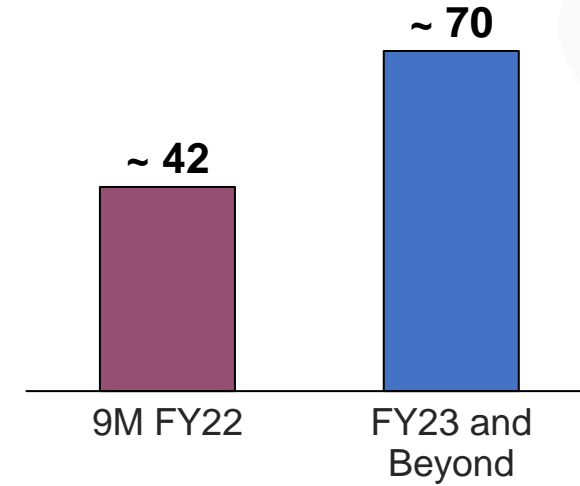
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# Growing order book

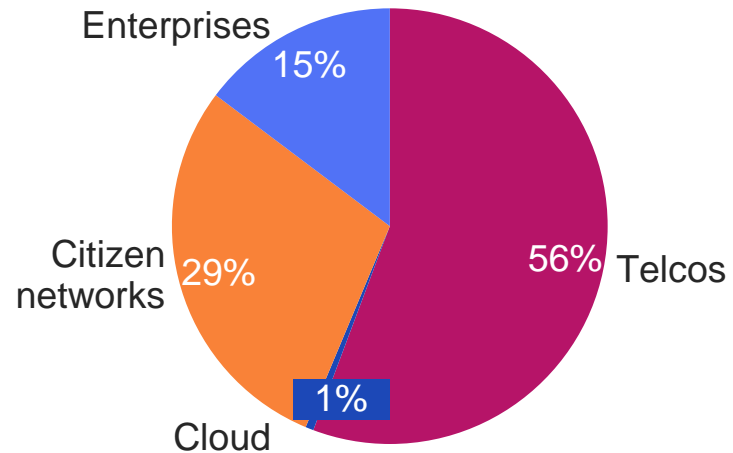
### Open Order Book (Rs. bn.)



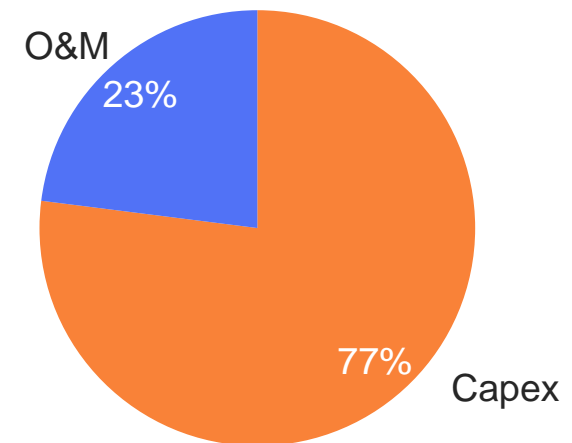
### Order Book Spread (Rs. bn.)



### Open Order Book Customer Segment wise



### Open Order Book Split



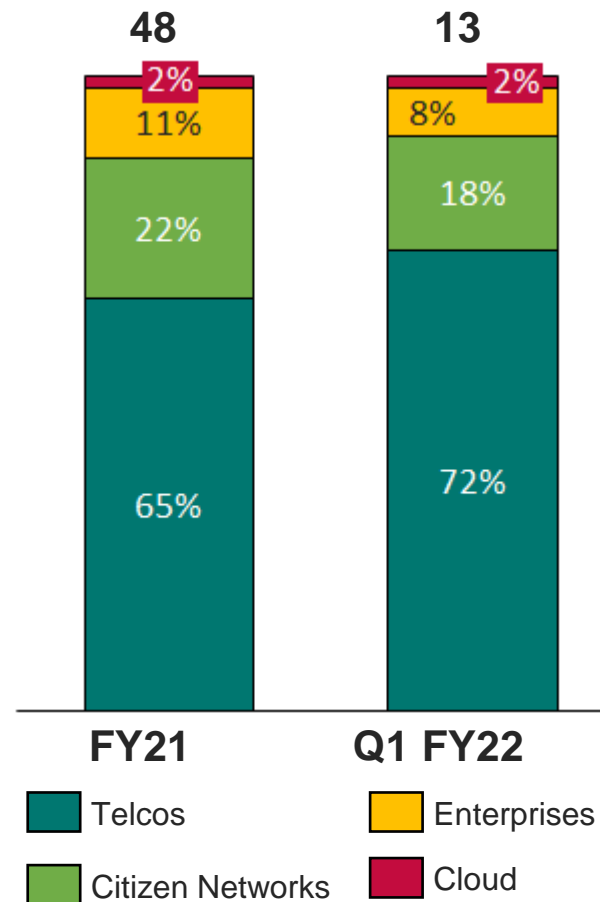
# Revenue mix moving to geographies and segments of choice



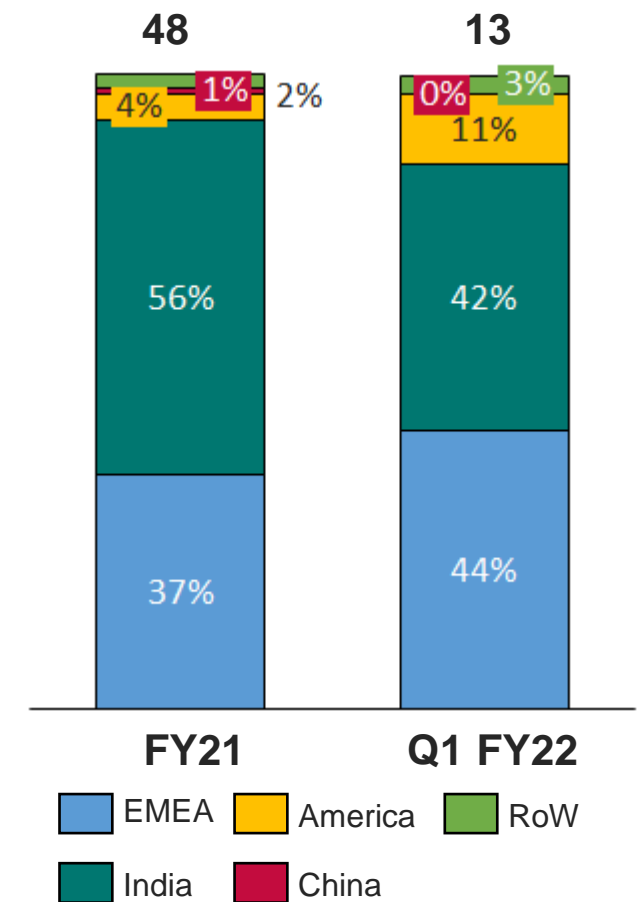
## Key Order Wins Q1 FY22

- Multi-million dollar deal with a large **European telco** for **Opticonn**
- Incremental order for **Lead 360** from a **large Indian Telco**
- Strategic partnership with a leading **Telecom solution provider in UK** to connect homes to broadband by deploying **FTTx Mantra**

## Customer Segments Revenues (Rs. bn.)



## Geographical Distribution Revenues (Rs. bn.)



# Project execution running at full-speed post the pandemic-led challenges of Q1 FY22



## Navy's Network Modernisation

**Project Varun**  
(Indian Navy Project)

**95%**  
Completed



## Modern Optical Network

**Fiber roll out**  
(Large Indian telco)

**48%**  
Completed



## Transformative Rural digital inclusion

*Bharatnet Projects*

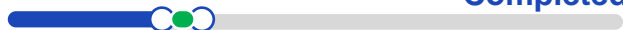
**Mahanet**

**92%**  
Completed



**T-Fibre**

**27%**  
Completed



## Hyperscale Data Centers

*Data Centre Projects in EMEA*

**Completed** in Nos. < LY > **82**



**Ongoing** in Nos. < CY > **13**



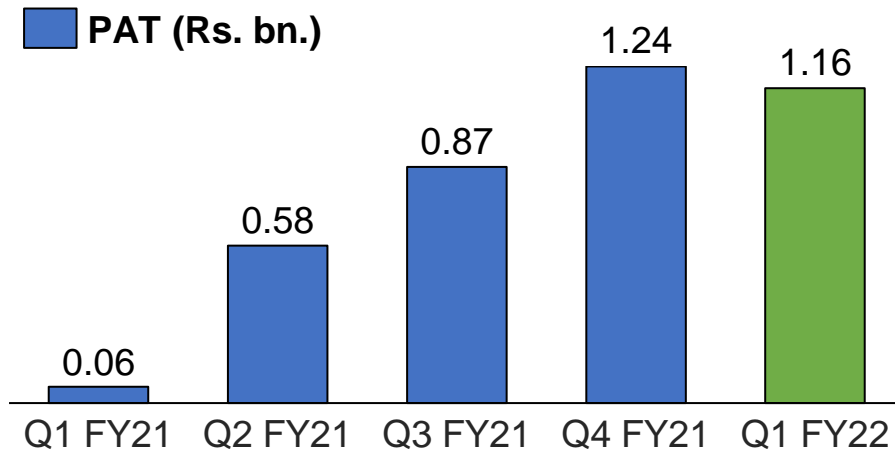
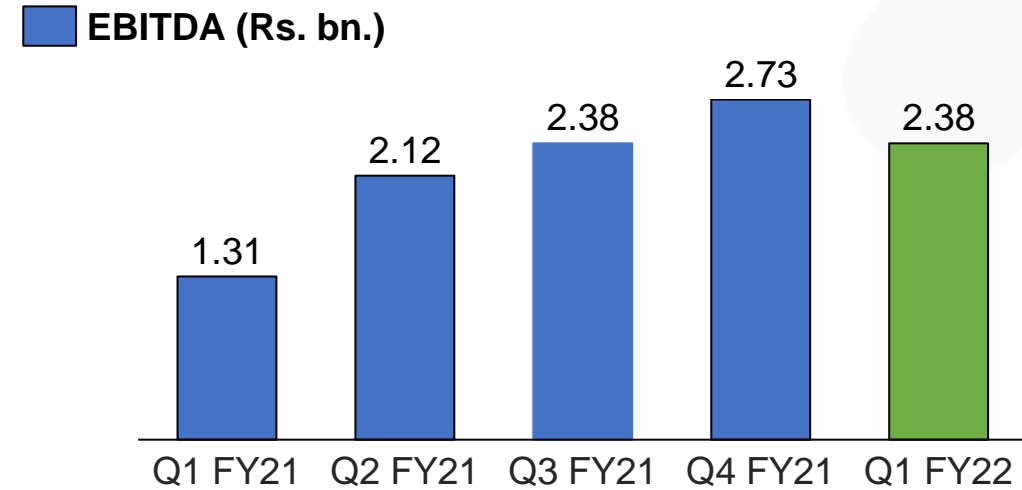
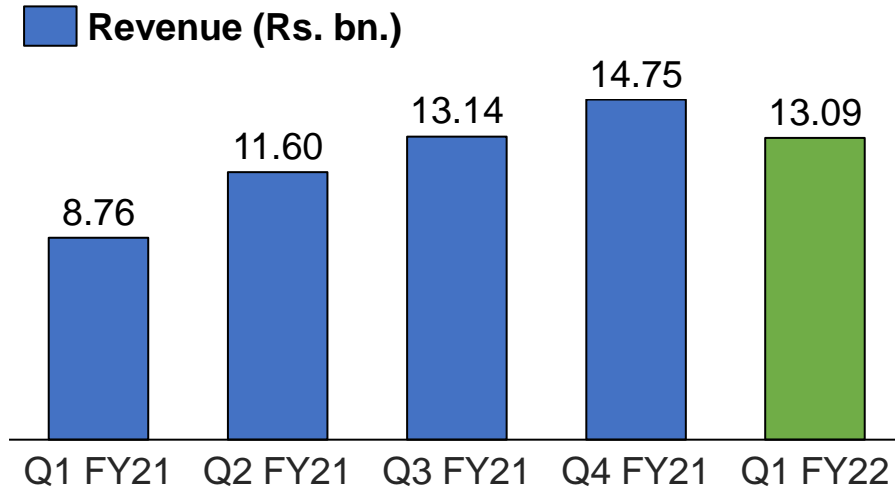
## UK Gigabit Network

**FTTH**  
(UK)

**Now**  
Started



# Q1 FY22 performance has been robust

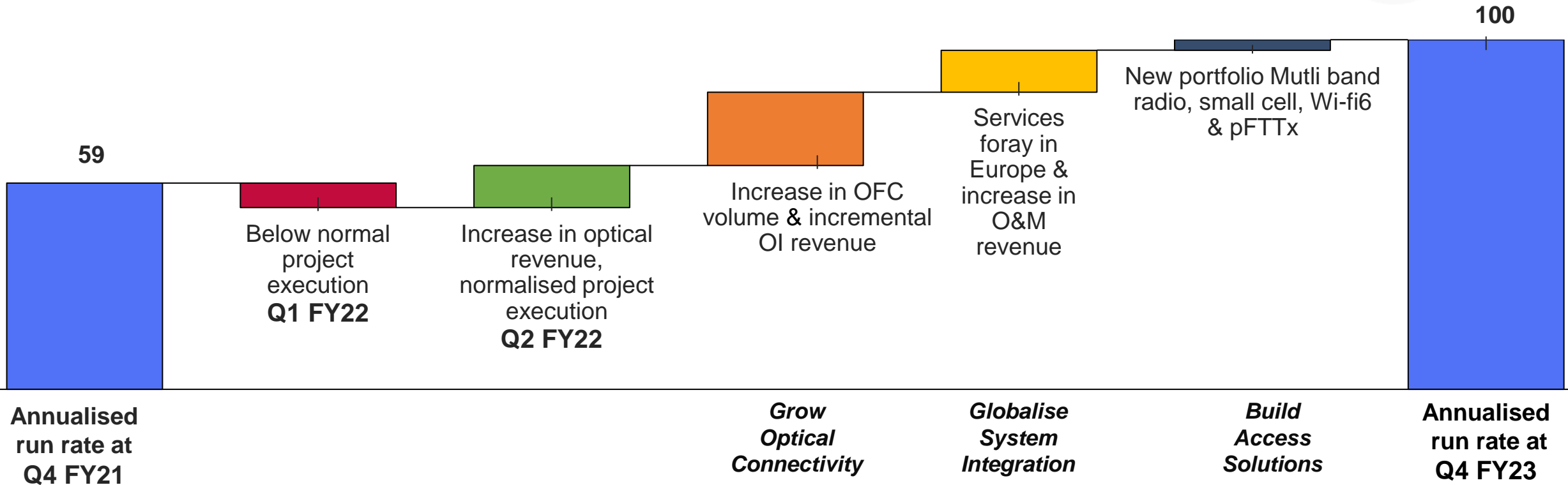


- **Optical business continues to grow**
- **Project execution was below normal due to second wave of the Covid-19 pandemic in India.**
- **We expect to go back to QoQ growth momentum from Q2 FY22 onwards.**

# With a structure plan to reach Rs. 100 bn. annualised run rate by Q4 FY'23



## Revenue Bridge ( Rs. bn. )



## Financials: Abridged Version



| P&L (INR Bn.)                             | Q1 FY'22    | Q4 FY'21    | Q1 FY'21    |
|---|-------------|-------------|-------------|
| Revenue                                   | 13.09       | 14.75       | 8.76        |
| EBIDTA                                    | 2.38        | 2.73        | 1.31        |
| <i>EBITDA %</i>                           | 18%         | 19%         | 15%         |
| Depreciation                              | 0.70        | 0.61        | 0.74        |
| <b>EBIT</b>                               | <b>1.69</b> | <b>2.12</b> | <b>0.57</b> |
| Interest                                  | 0.49        | 0.53        | 0.50        |
| Exceptional Item                          | 0.16        |             |             |
| <b>PBT</b>                                | <b>1.35</b> | <b>1.58</b> | <b>0.07</b> |
| Tax                                       | 0.38        | 0.50        | 0.04        |
| <b>Net Income after minority interest</b> | <b>1.16</b> | <b>1.24</b> | <b>0.06</b> |

COVID-19 impacted performance and project execution



# Committed to deliver our financial targets



## Growth

Revenue run rate : Rs. 100 bn. per annum *by Q4 FY'23*

## Capital Structure

Net debt/equity < 0.5 by Q4 FY23

## Returns

RoCE >20%



**We are in a decade long network creation cycle** driven by 5G, FTTx and rural connectivity programs.

In the last 5 years, **our TAM has increased 5x to \$40 bn.**  
Now our focus is to **increase our market share** in the \$40 bn. TAM

**Our 3 growth levers** of grow optical business, globalise system integration and build access solutions **have started delivering results.**

We are strengthening our foundational **capabilities** of E2E solutions, KAM approach, Ecosystem Investments and top talent & culture **to expand globally.**

We plan to reach **Rs. 100 bn. revenue run rate** by Q4 FY'23  
along with **Net debt/equity < 0.5 and RoCE > 20%**

# Annexure



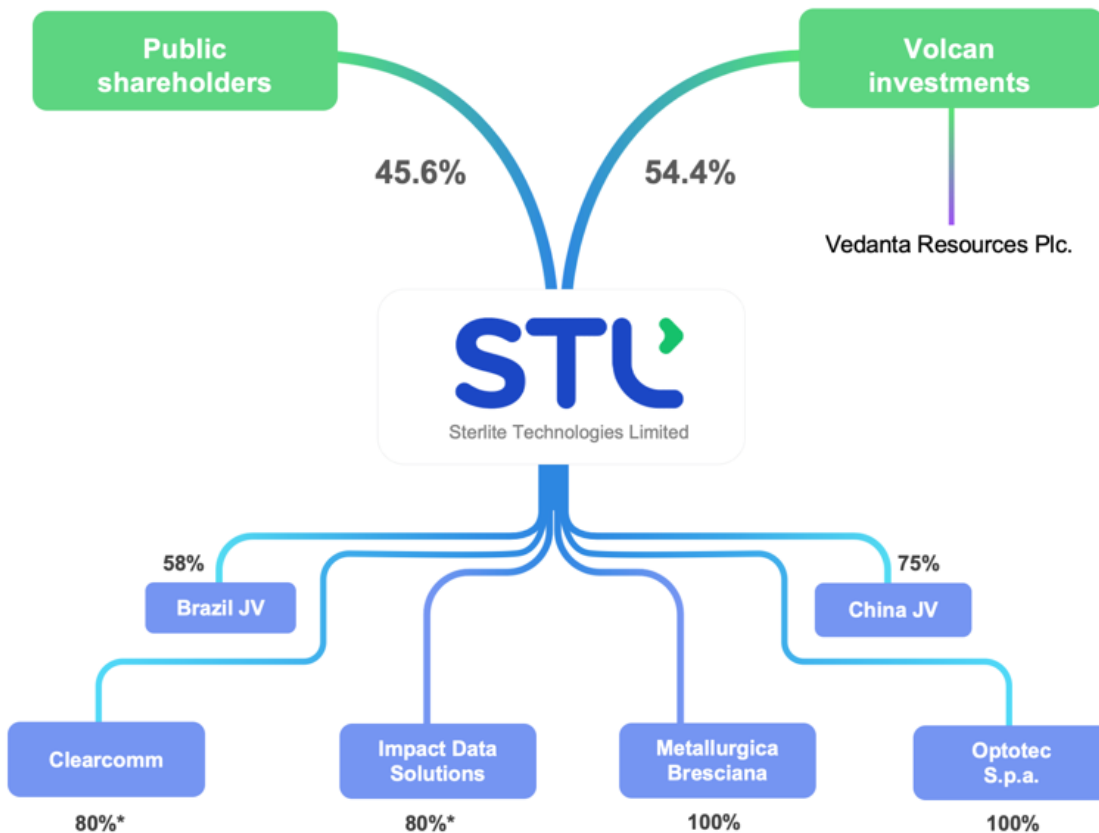
|                  |                              |                          |                      |                  |                |                 |
|------------------|------------------------------|--------------------------|----------------------|------------------|----------------|-----------------|
|                  | 1                            | 2                        | 3                    | 4                | 5              |                 |
| Company overview | Digital network growth story | STL's unique proposition | Future growth levers | Q1 FY'22 updates | STL financials | <b>Annexure</b> |

# Corporate structure and shareholding pattern



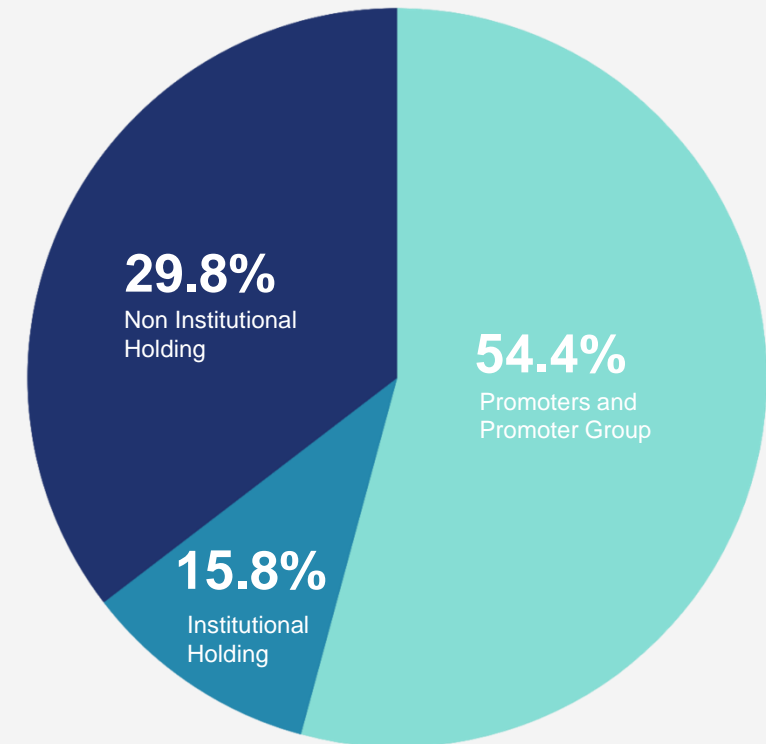
## Corporate structure

As on June 30th, 2021  
Only Subsidiaries that are material are disclosed



## Shareholding pattern

Source: Company information; Karvy Shareholding Services; Data as of June 30th, 2021



# Our Values



hunger to  
learn



keep it  
simple



promises  
delivered



respect &  
empathise



**DR. ANAND  
AGARWAL**

Group CEO And Whole-Time  
Director

Dr. Anand Agarwal is the Group CEO of STL and is passionate about driving technological advancement to impact everyday lives. Recognising the exponential growth in data consumption and shifts in the global technology landscape, Anand has navigated STL from an optical connectivity company to a global leader in end-to-end data network solutions.

Anand is driving STL as an industry leading integrator of data networks with core capabilities in optical connectivity, radio engineering and networking software. Anand was honoured with the prestigious 'Broadband Infrastructure Leader Award' in 2016 and "Pathbreaker of the Year" in 2019 for transforming India's digital infrastructure at the Telecom Leadership Forum.

A PhD in Materials Engineering from Rensselaer Polytechnic Institute and B.Tech from IIT Kanpur, Anand is a hands-on technologist on advanced photonics and programmable networks. He is a firm believer in empowering and transforming lives through innovations in technology.



[@anandagarwal2](#)



[@anand1agarwal](#)

# Executive Leadership Team



**Ankit Agarwal**  
Executive Director

Ankit is driving strategic growth roadmap for STL. Formerly, Ankit was CEO of CSB, which he helped expand over 100 countries and oversaw multiple acquisitions and JV's.



**Mihir Modi**  
Chief Financial Officer

Mihir is a seasoned professional with more than 20 years of experience in Finance, M&A, Strategy, and General Management. He joined STL in 2020.



**Paul Atkinson**  
CEO, Connectivity Solutions Business

Paul is an industry veteran with over 30 years of experience and deep expertise in the optical space. He joined STL in 2021



**KS Rao**  
CEO, Network Services and Software Business

Joined STL in 1993 to set up India's first optical-fibre cable plant KS now leads the Network Services and Software Business and Digital India program.



**Chris Rice**  
CEO, Access Solutions Business

Chris is a technology expert with 25 years of experience in the telecom sector. He joined STL in 2021



**Dr. Badri Gomatam**  
Group Chief Technology Officer

A end to end digital networks technology expert, Badri leads core research in optical communications products and network solutions.



**Sandeep Girotra**  
Global Sales Head

Sandeep is a seasoned sales leader with over three decades of experience in B2B infrastructure business across ICT, IT, Telecom Infrastructure and Telecom Services..



**Anjali Byce**  
Chief Human Resource Officer

As STL grows exponentially, Anjali and her team are building an agile and culturally strong organisation by running strong programs on talent, culture, values and diversity



**Manish Sinha**  
Chief Marketing Officer

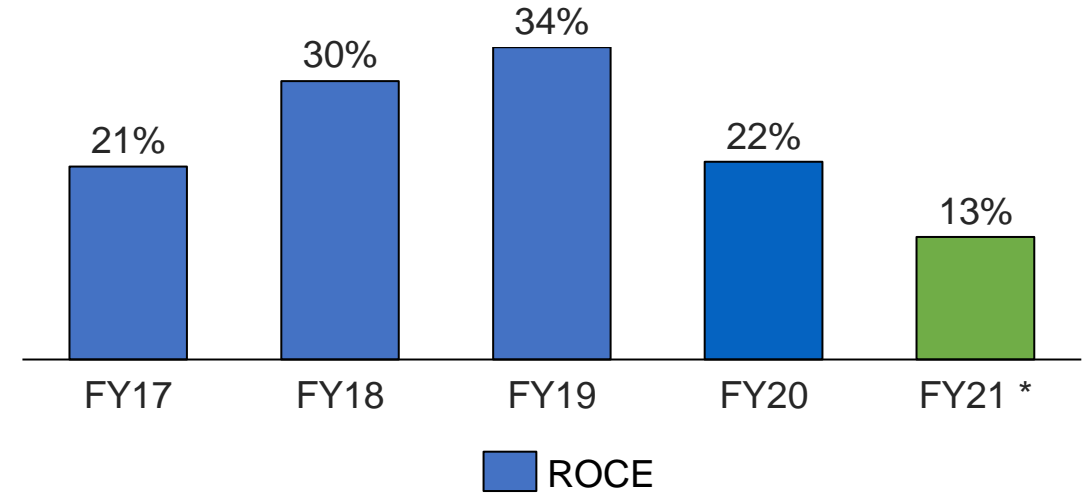
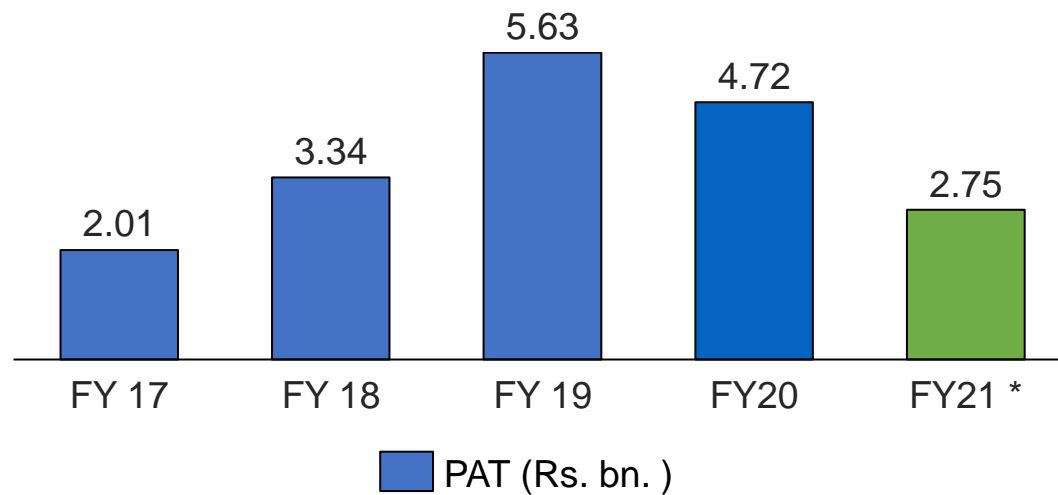
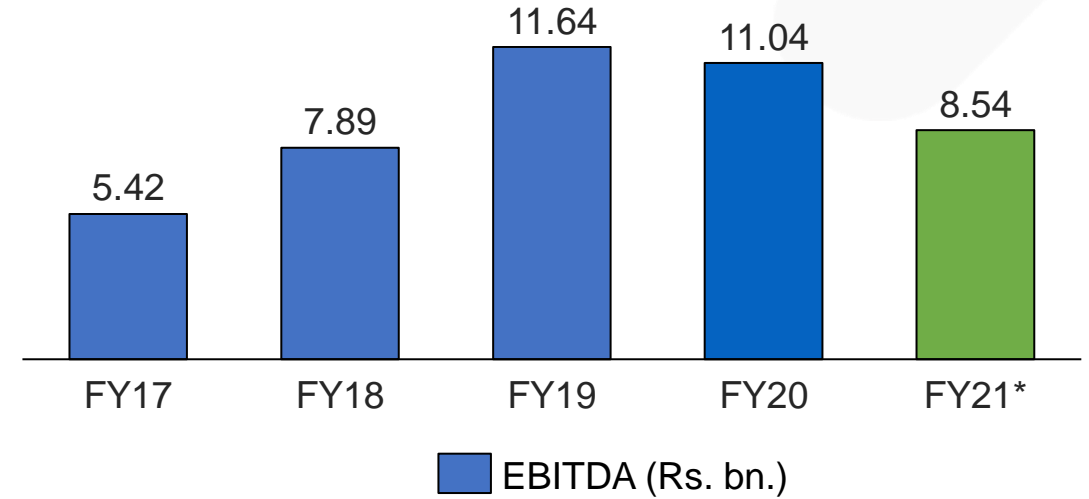
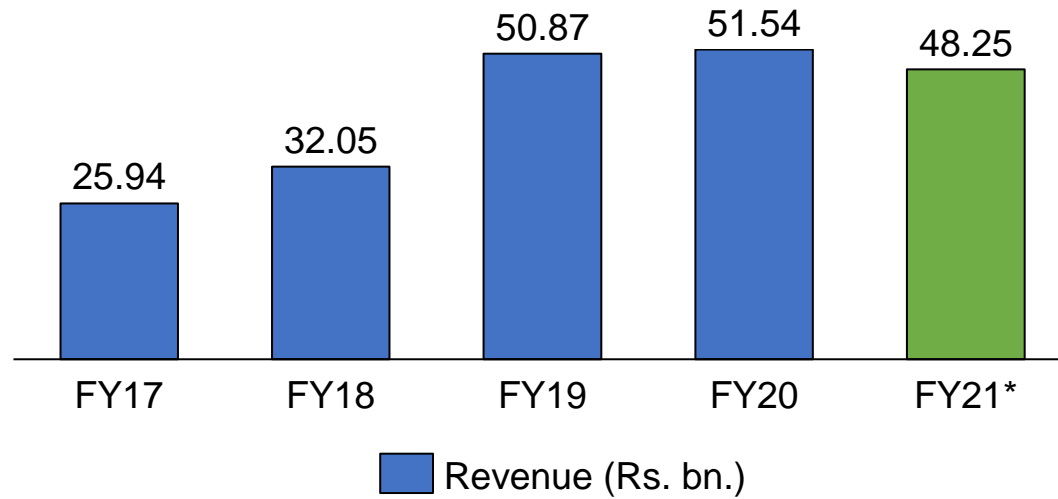
With experience in consulting, B2B and B2C marketing, Manish leads brand positioning and customer engagement at a time when the Company is growing exponentially.



**Akanksha Sharma**  
Head CSR and Sustainability

Akanksha spearheads the company's vision for CSR and Sustainability and drives a portfolio of community projects aligned to the UN Sustainable Development Goals.

# Delivering sustainable value for our shareholders







beyond tomorrow