



01 October 2024

BSE Limited  
PJ Towers, 25<sup>th</sup> Floor,  
Dalal Street  
Mumbai 400001.  
Scrip Code: 532175

National Stock Exchange of India Ltd  
Exchange Plaza,  
Bandra-Kurla Complex, Bandra(E)  
Mumbai-400 051.  
Scrip Code: CYIENT

Dear Sir/Madam

Sub: Outcome of Institutional Investor/Analyst Meet  
Ref: Our letter dated 25 September 2024

Reference to the Intimation of Institutional Investors/Analyst Meet dated 25 September 2024,  
please find the attached Presentation made to the Investors.

This is for your information and records.

Thanking you  
For Cyient Limited

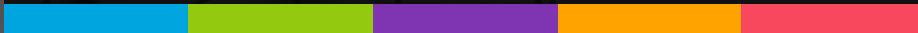
Ravi Kumar Nukala  
Dy. Company Secretary

Cyient Ltd. 4<sup>th</sup> Floor, A Wing, 11 Software  
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# Cyient Semiconductor Private Limited

SEP 2024



# Semiconductor market rebounds, despite downturns; ~\$600Bn mkt at 13% CAGR



The global semiconductor market **saw a dip of ~12% in 2020** due to the COVID-19 pandemic but rebounded strongly in 2021, reaching >\$550 Bn



The market **continued to grow in 2022**, albeit at a slower pace, despite supply chain challenges



Global Semiconductor Market in 2024 is valued at **\$607Bn**, growing at **12.8%** and expected to reach **\$1.6Tn by 2032**

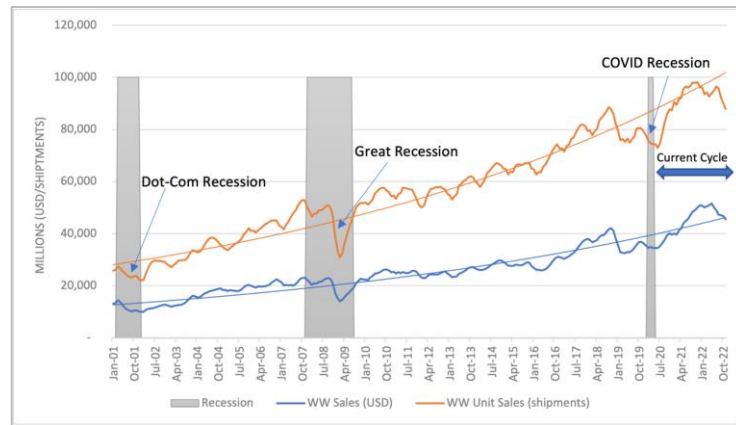


Driven by rapid advancements in tech and increasing demand across **automotive, consumer electronics, and industrial automation** sectors

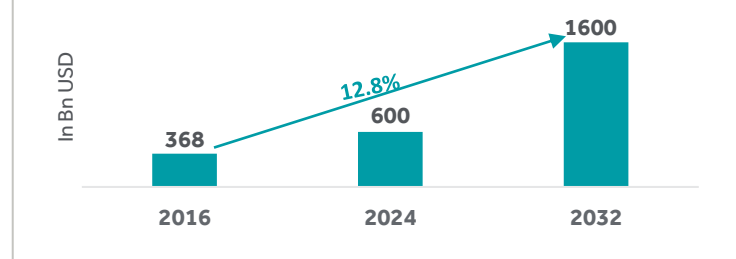


**\$200Bn+** invested in **U.S. semiconductor** capacity, bolstered by global government support and major fab investments

*The recovery of semiconductor market after periodic downturns*

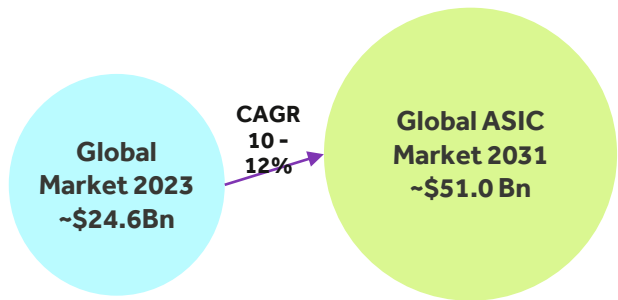


*The market size & growth*



Source: Statista

# ASICs: ~3x faster growth than general purpose chips, driven by IT/OT integration



- ASICs are custom chips made for specific applications, offering **targeted performance, power efficiency, and size optimization**
- **Rising need for small scale, custom, high-performance, energy-efficient chips** to enable IT-OT integration led growth
- **APAC dominates the market** due to strong semiconductor infra, R&D investments, and major players like TSMC, Samsung, and SMIC
- **Consumer electronics (24%), telecom (26%), and automotive (19%)** lead, with industrial poised for fast growth due to increased microcontroller use

	General	ASIC
Semiconductor Mkt	67.4%	32.6%
2016 – 2019 growth	7.9%	3.9%
2019 – 2020 growth	8.2%	<b>15.3%</b>
2021 – 2025E	3.6%	<b>10-12%</b>

## General-Purpose

- ✓ **Versatile** but less optimised
- ✓ Used in **wide range** of applications
- ✓ **Large, less power-efficient,** and underperform in specialised tasks

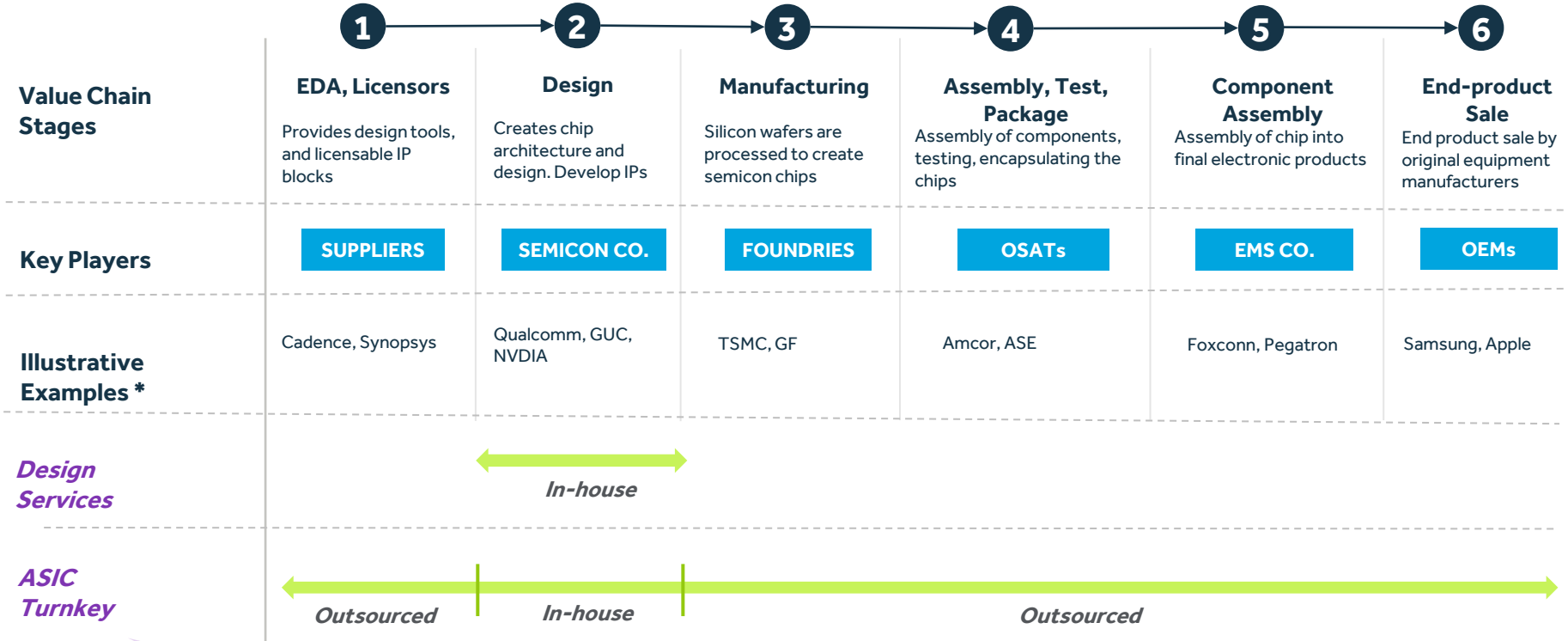
## Application-Specific

- ✓ **Custom-built** for specific tasks
- ✓ Superior in performance, **power, efficiency, and space-saving**
- ✓ Ideal for applications requiring **high specialisation** – IT-OT integration

*Trend reversal in 2019: Higher growth for ASICs than general-purpose chips*

# Cyient provides fabless ASIC turnkey solutions across the entire lifecycle

From material procurement to design, manufacturing, and end-product sales; turnkey includes the entire spectrum



ASIC Turnkey needs different capital structure and business model

\*Illustrative

# Cyient's strengths and decades of head start positions it for high growth



## 25+ Years of Expertise

Expertise in high-performance **analog, RF, and mixed-signal circuits**, and efficient **sensor data capture with low power consumption**



## Strategic Partnerships Across Value Chain

**Longstanding partnership** with leading foundries, EDA/IP giants, OSAT leaders, semiconductor companies and established OEM



## Extensive IP Portfolio

**Hundreds of analog/digital IPs** covering various functionalities & silicon technology nodes



## Capability and Customer Readiness

- **Strong overlap of customers** – ca. 2/3<sup>rd</sup> of demand from existing sectors of DET
- **R&D, IP and Test labs in Germany and Belgium**, with satellite design hubs in India and USA



## Excellent Track Record

**40+ ASIC turnkey projects executed**, delivering **~5M chips** annually. Full-service coverage from design to production and sales

# Thank you

#DesigningTomorrowTogether

[www.cyient.com](http://www.cyient.com)

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