



Ref: Protean/Secretarial/2024-25/87

January 30, 2025

To,

**BSE Limited (“BSE”)**

P.J. Towers, Dalal Street,

Fort, Mumbai – 400 001

**Scrip Code: 544021**

**ISIN: INE004A01022**

Dear Sir/Madam,

**Subject: Investor Presentation for the quarter and nine months ended December 31, 2024**

Pursuant to Regulation 30 read with Schedule III and other applicable provisions of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find enclosed herewith Investor Presentation on Company’s Operational and Financial Performance for the quarter and nine months ended December 31, 2024.

This is for your information and records.

Thanking you,

Yours truly,

**For Protean eGov Technologies Limited**

**Maulesh Kantharia**

**Company Secretary & Compliance Officer**

**FCS 9637**

Encl.: As above



# Q3 & 9MFY25 Investor Presentation

**PROTEAN eGOV  
TECHNOLOGIES LIMITED**  
(formerly NSDL e-Governance  
Infrastructure Limited)

**January 2025**



# Company Overview



Protean – A leader & pioneer in e-Governance



Driving Change: Building for Billions

PROTEAN eGOV TECHNOLOGIES LIMITED  
(formerly NSDL e-Governance Infrastructure Limited)

# Protean - India's Pioneer in e-Governance

Protean is an IT-enabled solutions company that creates digital public infrastructure

We develop innovative citizen-centric e-governance solutions.

<b>e-Governance platforms</b>		Tax Systems	Pension Systems	Foundational Identity			
<b>Digital Identity</b>		E-KYC	OPV	Digital Authentication	E-Sign		
<b>Open Digital Ecosystems</b>		Ecommerce	Mobility	Agriculture	Data Exchange: Account Aggregator	Education & Skilling	Health
<b>Enterprise Digitization</b>		Consumer/ Corporate Tech	Cloud Services	Cyber Security			

Emergence of Open Digital Ecosystems



Developed 19 Nationally critical e-governance stacks



Led by industry veterans and an experienced board

# Driving the Change: Building for Billions

## Tax Services

- **PAN:** 3-players market – Leading cumulative market share of **64%**
- **51.5cr+** PAN Cards – the first digitally verifiable ID
- **13.5bn+** Online PAN verifications

## Social Security and Welfare

- **APY + NPS** – Leading market share of more than **97%**
- **7.9cr+** pension subscribers
- Largest subscriber base across **B2C, B2B, B2G**

## Digital Identity

- Sole provider of **four foundational identity services:**
  - Aadhaar eKYC
  - Aadhaar Auth
  - E-Sign
  - Online PAN Verification



## International Expansion

- Taking India stack global
- Contributing towards creating **Digital Public Infrastructure**
- **Target Geographies-** South East Asia, Middle East, Africa

## Open Digital Ecosystems

### Multi-sector interventions

- E-Commerce
- Transport & Mobility
- Open Finance & Sustainability
- Agriculture
- Health
- Education & Skilling

## Cloud & Infosec Services

- IaaS & PaaS
- DaaS & Virtual Office
- SaaS
- Security Architecture
- On-premises Cloud
- 5G Private Network

## Data Stack

- **Protean LIFE** - All-in-one platform to streamline sustainability Initiatives
- **RISE with Protean** - API marketplace enabling Digital On boarding & Lending
- **ProteanX** - Digitally verifiable credentials
- **eSignPro** - Digital Documentation suite
- **AI enabled CKYC**
- **Account Aggregator**

# Modernization Of India's Tax Infrastructure



Growing Use Cases for PAN Authentication



Increasing Relevance of PAN Cards – leading to higher demand

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# Growing Use Cases for PAN

↓ **Growing Use Cases leading to high usage of PAN**

Authentication of digital transactions

Investments in shares and Mutual Funds

Availing credit from financial institutions

Property transactions

Availing Government schemes

Jewellery purchase and foreign trips

## Why Will PAN Issuance Continue To Grow Strongly?

**>3.3 Crores**

Bank accounts opened in FY24\*

**~ 1.2 Cr\***

Youth that enters the workforce every year

**~ 5 Cr\***

New Bank Accounts opened every year

**>50 Cr\***

Population that doesn't have a PAN card yet

**133 Bn**

Digital Transactions happened in FY2024 in India#

**>80 Lakhs**

Pan Verifications are done in a day

**17.5 crore+**

DEMAT account holders in India

## Favourable Tailwinds

Formalization of workforce in India (World's largest and fastest growing workforce)

Financial aid schemes including 'Pradhan Mantri Vidya Lakshmi Karyakram' require PAN to avail

PAN as a single identifier for businesses

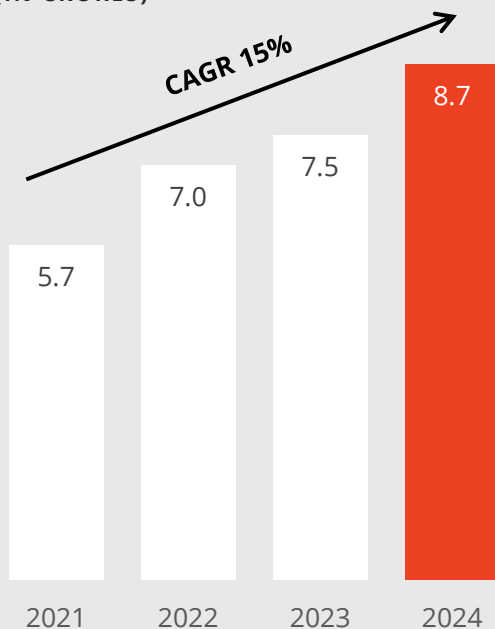
Central and State Government focus on introduction and saturation of various Government initiatives and welfare schemes will result in higher PAN issuance in near to medium term

Sources: \* Economic Times, #India: number of digital payments 2024 | Statista. Company data

# Protean - a leader in Tax Services

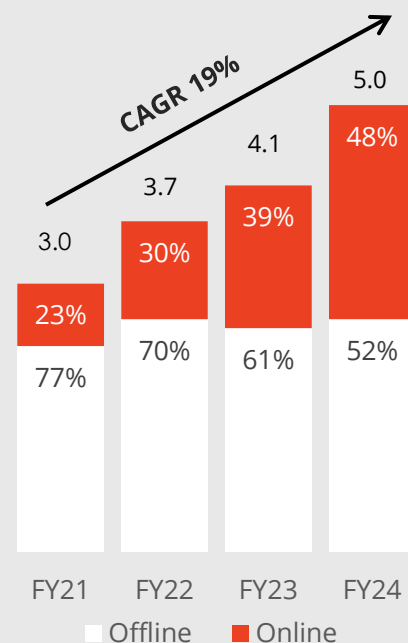
## Rapid acceleration of PAN issuance

Number of New PAN Cards Issued in India (#)  
(IN CRORES)



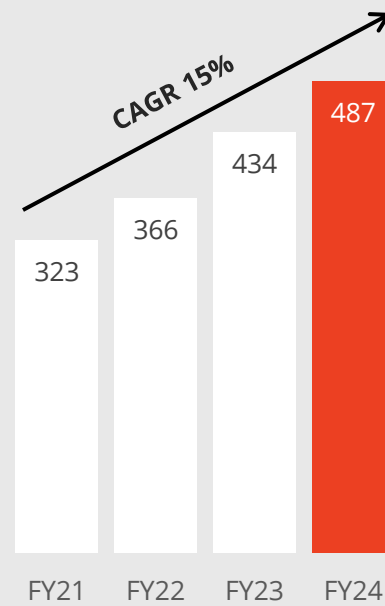
## Protean - Annual PAN Issued

(IN CRORES)



## Tax Services Revenue

(₹ IN CRORES)



### In 2004, Protean set up the Tax Information Network

- Largest issuer of India's Digital Tax Identity
- PAN Card - A prominent identity for Businesses/ non-Individuals
- Asset Light
- Prepaid B2C
- Transactional Business

~7-8 cr

Pan cards issued per year in India

~51 cr

Cumulative Pan cards issued by Protean

64%

Protean Market Share in Cumulative Pan Issuance

Sources: # Income Tax Department



# Streamlining of Pension Records



Large Headroom for Growth



Protean – Strengthening the Social Security Infra

03

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# Large Headroom for Growth

India is among the countries with lowest per capita pension assets in the world



## Private-Sector workers covered under pension

**72%** in US<sup>(1)</sup> **vs** **6%** in India<sup>(2)</sup>

India's pension assets to GDP ~16.5% vs 100% in developed countries and 82% in OECD nations.

## Private Sector Opening Up to Pension as an Investment Option

**INR 67 Tn** MF AUM<sup>(3)</sup> **vs** **INR 13.8 Tn** NPS AUM<sup>(4)</sup>

## Huge Headroom for Growth

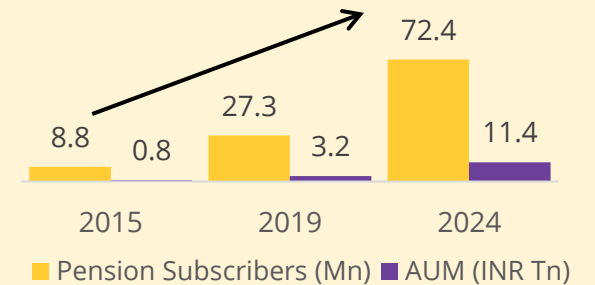
**~54 Cr** Jan Dhan Accounts **vs** **~8 Cr** NPS + APY Accounts<sup>(4)</sup>

## Union Budget 2024-25 focused on making NPS a more inclusive lifecycle instrument promoting savings from an early stage

- NPS- Vatsalya - significantly widening the NPS coverage to approximately 40 crore minors
- Increase in threshold limit for NPS contribution by employer from 10% to 14%

Sources:  
[Retirement plans for workers in private industry and state and local government in 2022](#) (1)  
[India's pension system improves from 2022: Report - The Economic Times \(indiatimes.com\)](#) (2)  
[AMFI Annual MFEReport.pdf \(amfiindia.com\)](#)(3)  
<https://pib.gov.in- as on 21st Dec'24> (4)

**26%**  
CAGR in Subscribers



Increased benefits to private and government employees

Underpenetrated market owing to large unorganized workforce

Extended vesting period: Members can now join NPS from infancy to 70 years

# Protean – Strengthening the Social Security Infra

Protean strengthened the social security infrastructure for citizens in India as the Central Recordkeeping Agency

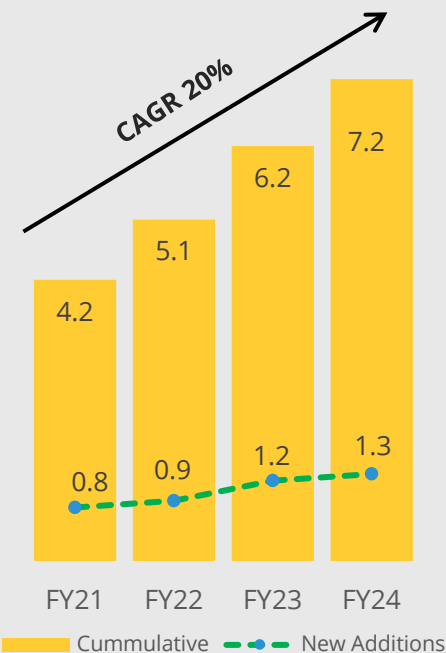
- Built India's first Digital Pension Infrastructure
- India's largest CRA for NPS and APY

This segment caters to customers including businesses (pension plans for private sector employees – B2B), retail customers (B2C) as well as government employees (B2G)

The segment has both Annuity and Transactional revenue streams

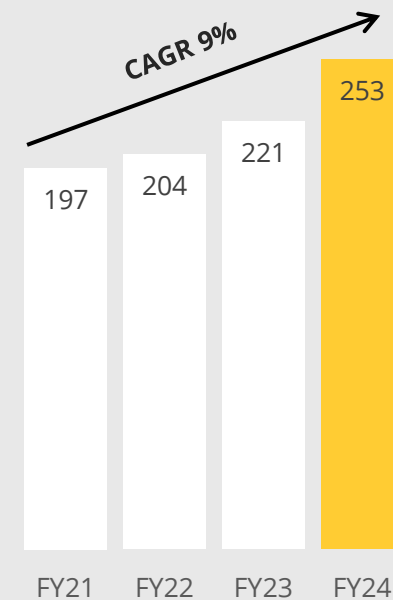
## CRA Services

(IN CRORES)



## Revenue – Pension Services

(₹ IN CRORES)



# 97%+

Market Share in NPS + APY



# Key contributor to India's Foundational Identity

04



Digital Penetration in India in 2024



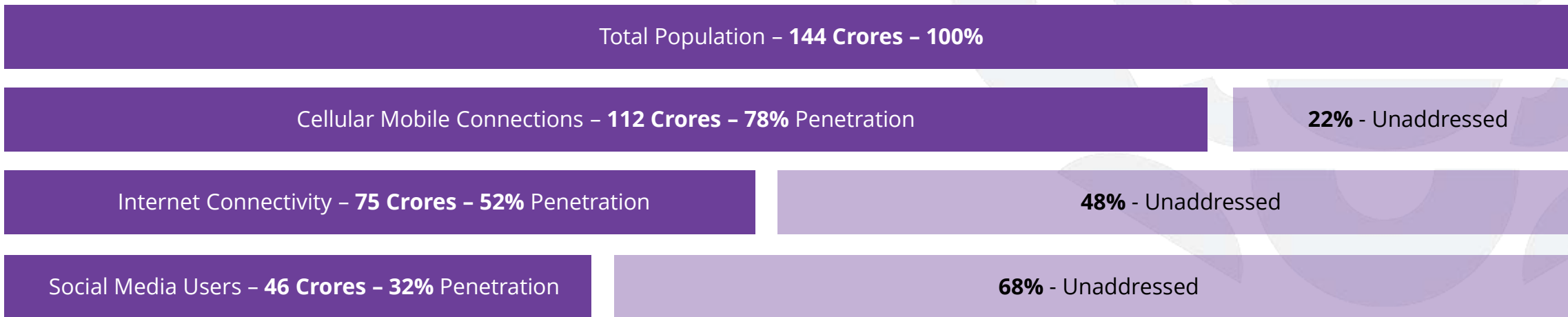
Rapid Acceleration in Digitalization since 2020



Protean – Comprehensive Service Portfolio

PROTEAN eGOV TECHNOLOGIES LIMITED  
(formerly NSDL e-Governance Infrastructure Limited)

# Digital Penetration in India in 2024



**Population Growth**

**+0.9%**

**+1.3Cr**

Year-on-Year Change

**Cellular Mobile Connections**

**+2.1%**

**+2.3Cr**

Year-on-Year Change

**Internet Connectivity**

**+2.6%**

**+1.9Cr**

Year-on-Year Change

**Social Media Users**

**+15.6%**

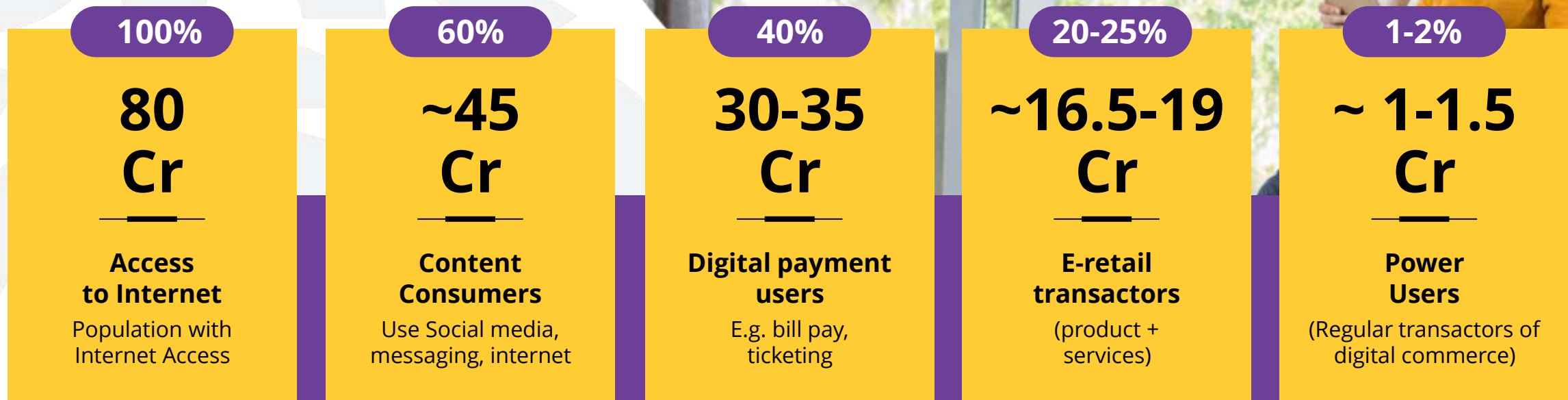
**+6.0Cr**

Year-on-Year Change (2)

Data as on Jan 2024

Source: DIGITAL 2024: INDIA(1), Number of social media user accounts in the Asia-Pacific region as of January 2024, by country or territory(2)

# Digital Penetration in India in 2024



Despite the increasing trend of digital adoption, there is currently **low penetration into digital payment, e-retail and digital commerce**

This is expected to improve based on **rising internet & smartphone access, better infrastructure and increasing digital adoption**

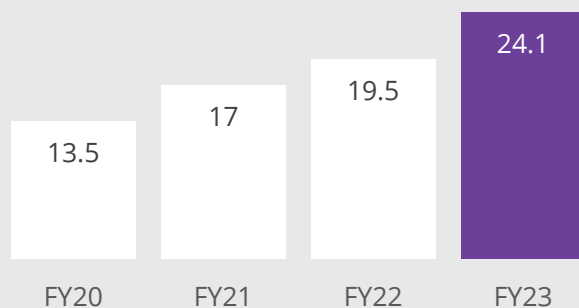
# Rapid Acceleration in Digitalization since 2020

Despite low internet penetration, average wireless data usage per subscriber per month in India was among the highest in the world, estimated at **24.1GB** as of 2023 <sup>(4)</sup>

Rapid adoption of UPI following demonetization - **10x growth in 5 years** – volume CAGR of 80%

## Average Data Consumption per user per month <sup>(4)</sup>

(IN GB)



## Market Growth Drivers

Favorable demographics

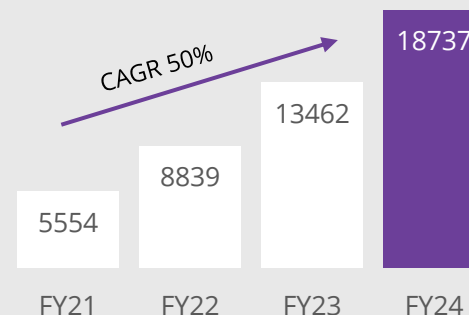
Vast expansion of the middle-class

Digital behavior patterns

Empowers every individual and business to transact paperless and cashless

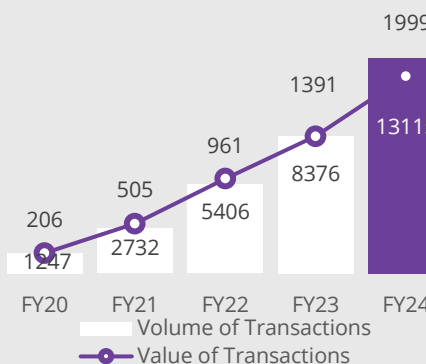
## Non-Cash Transactions

(IN CRORES) <sup>(3)</sup>



## UPI Adoption <sup>\*(2)</sup>

(IN CRORES)



**10x UPI Volume Growth since FY20**

**10x UPI Transaction Value Growth since FY20**

**3x Non-Cash Transactions Growth since FY21**

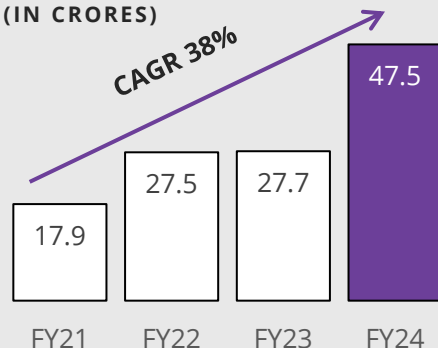
\* Cumulative

Source: (1) DIGITAL 2024; (2) INDIA, NPCI 2024, (3) [DoFS](#), (4) Nokia MBiT Index Report 2024

# Protean – Comprehensive Service Portfolio

## Aadhaar Authentication

(IN CRORES)



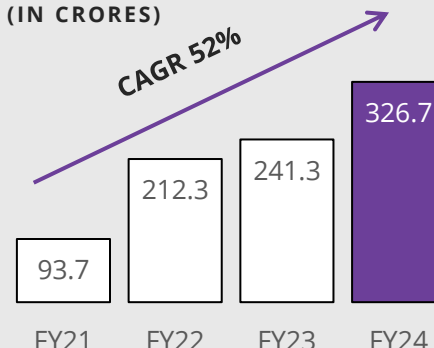
**~10 lacs**  
Transactions per day

Dominant market position (among top 5 ASAs)

Cumulative till date 313.3 Cr

## Online PAN Verifications

(IN CRORES)



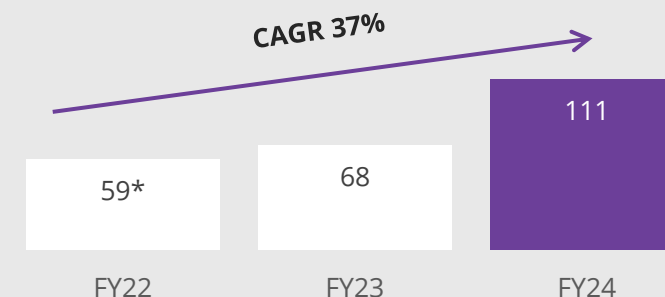
**~80 lacs**  
Transactions per day

**90%** Market Share

Cumulative till date 1,351.2 Cr

## Revenue – Identity Services

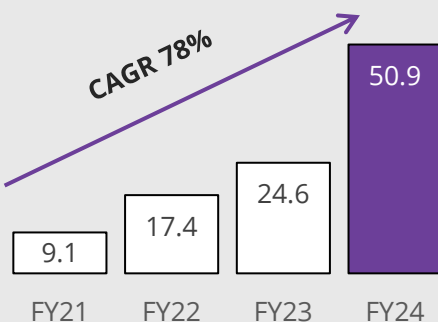
(₹ IN CRORES)



**Sole provider of four foundational identity services: E-sign, EKYC, Aadhaar Auth and OPV**

## e-KYC Transactions

(IN CRORES)



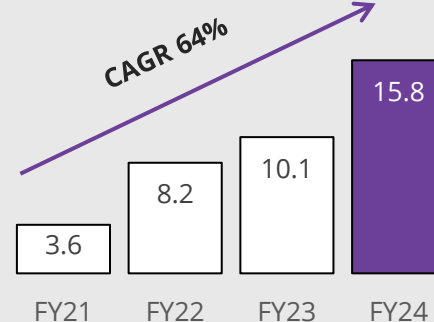
**~12 lacs**  
Transactions per day

Dominant market position (among top 5 KSAs)

Cumulative till date 192.7 Cr

## e-Sign Transactions

(IN CRORES)



**~4.3 lacs**  
Transactions per day

**70%** Market Share

Cumulative till date 54.1 Cr

Source: UIDAI

\*adjusted for revision in UIDAI Charges from Rs.20 per transaction to ~Rs.3 per transaction which is pass through cost for the company



# Data Stack

Enabling India's data-rich economy



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# Enabling India's **data-rich economy**



## Comprehensive API Stack

A comprehensive multi-sector API marketplace cum sandbox catering to:

Customer Onboarding

Credit Evaluation and Scoring

Digital Lending

ONDC & ONEST

### Use Cases:

Powering RBIH through foundational APIs

Consuming RBIH APIs to build end to end digital journeys

## Digital Onboarding & Verification

Regulatory-tech Stack to help financial institutions reduce risks & time to onboard customers, improve data accuracy and empower them to create seamless digital experiences.

### Use Cases:

Customer Onboarding

Instant Identity Verification

## Account Aggregator

Licensed by RBI to operate as an Account Aggregator

Consent based financial data sharing

### Use Cases:

Credit Evaluation

Personal Finance Management

# Open Digital Ecosystems - ODE

05



Building Digital Public Infrastructure layer by layer

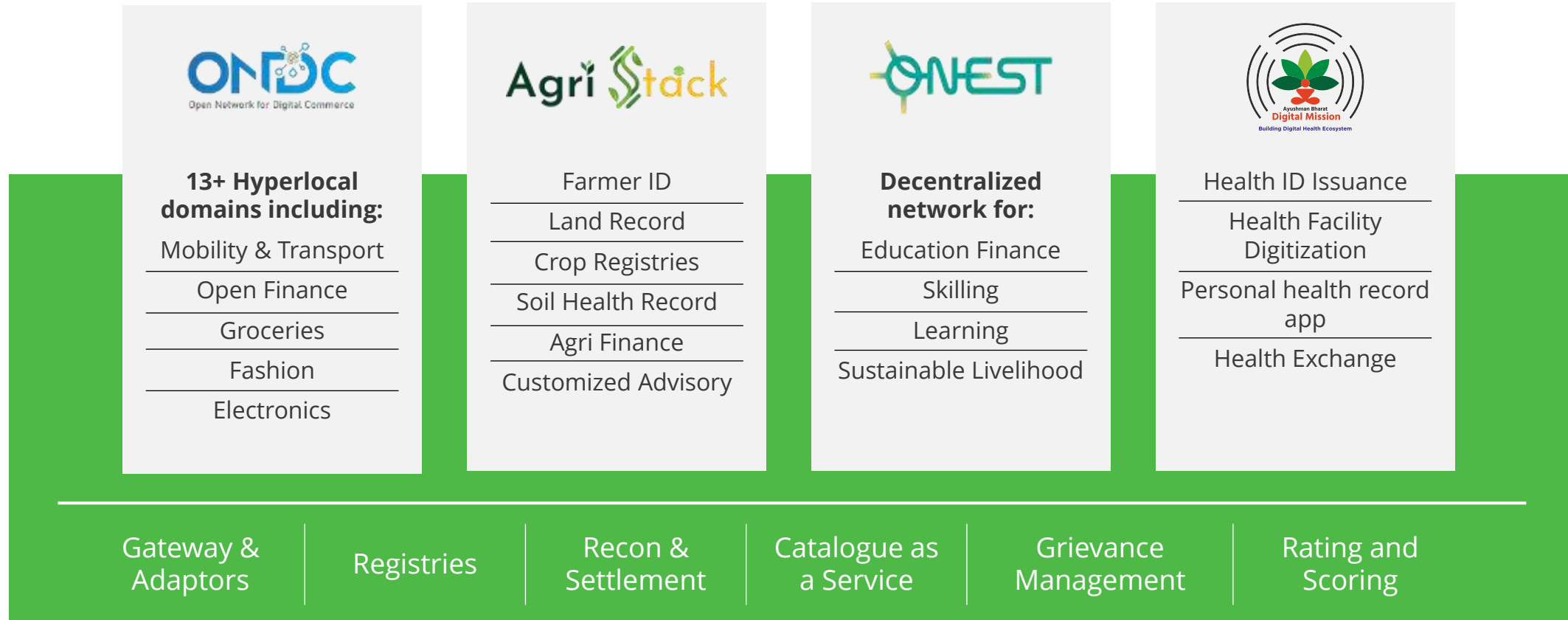


Open Network for Digital Commerce (ONDC)

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# Building Digital Public Infrastructure layer by layer..

Aligned with India's visionary DPI framework built on open standards and protocols, Protean continues to contribute towards multisectoral Open Digital Ecosystems



..to solve for population scale problems..

# Open Network for Digital Commerce (ONDC)

## Vision of ONDC

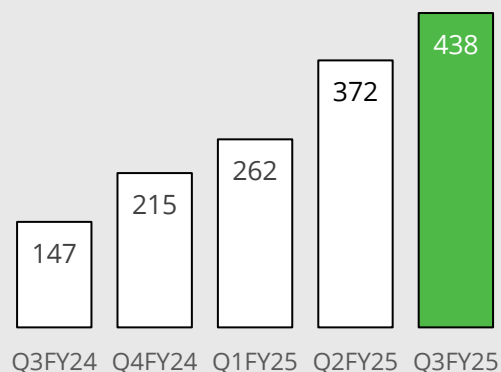
An open network for digital commerce that will establish open, inclusive, and competitive marketplaces online, creating choice and opportunity for everyone, by everyone.

- 13 Categories Live
- 1500 lac+ - Total orders
- 150 lac+ Monthly orders
- 4.3 lac+ Peak orders per day

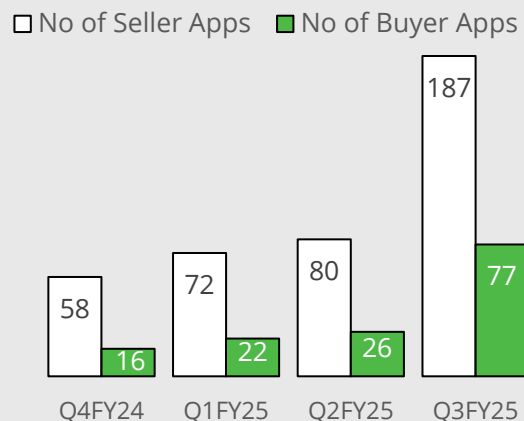
### Network Participants

- 7.64 lac+ Sellers
- 298 Network Participants:
  - Buyer apps – 77
  - Seller apps – 187
  - Logistics – 34
- 11.2 Cr.+ Search Transactions (Q3)
- 100% Availability
- 14,871 - Peak Transactions per second (TPS) (Q3)

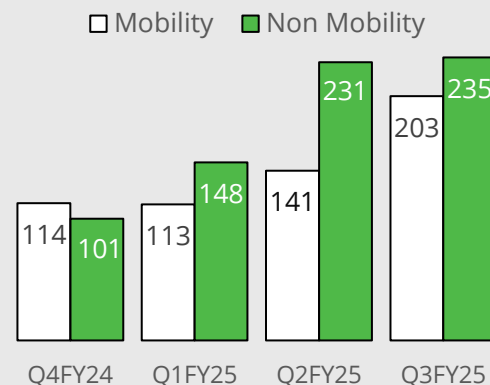
### No. of Transactions (IN LAKHS)



### No. of Apps



### Types of Transactions (IN LAKHS)



\* Cumulative

**Ample Opportunity to Grow**

01

Digital e-commerce is merely 7% of the total retail market with 165 mn users

02

Only 6% of all MSMEs actively sell on e-commerce platforms

03

Less than 2% of Indian population regularly uses digital commerce

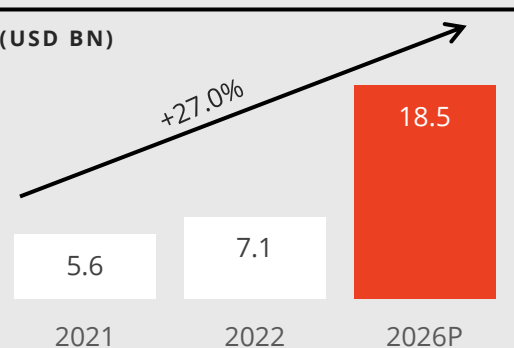


06

PROTEAN eGOV TECHNOLOGIES LIMITED  
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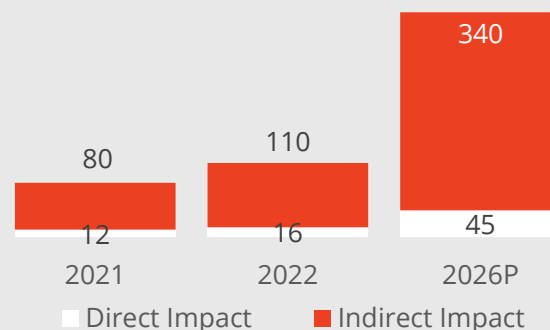
## Indian cloud market<sup>1</sup>

(USD BN)



## Potential GDP contribution from cloud

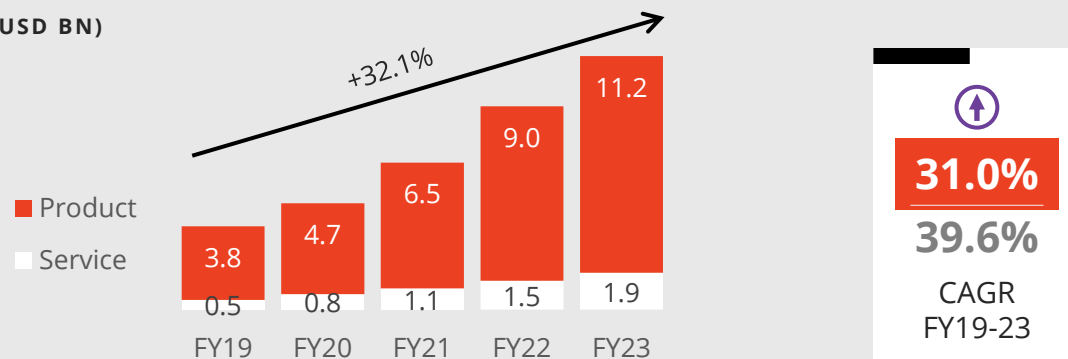
(USD BN)



Note: [1] The figures presented for the Indian cloud market exclusively encompass the public cloud segment  
Source: NASCOM, Industry Reports, Secondary Research, Deloitte Analysis

## Indian cybersecurity industry revenue

(USD BN)



## End-user industries of cloud

### Cloud-native industries



E-Commerce



IT Companies

Up to 30% of technology expense on cloud services and solutions

### Cloud progressive industries



Financial services



Media & entertainment

8-15% of technology expense on cloud services and solutions

### Cloud aspiring industries



Government

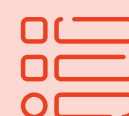


Retail

<10% of technology expense on cloud services and solutions



Industrials



Others

# ☐☐ CLOUD & INFOSEC

**Cloud to contribute ~USD 345 Bn to India's GDP by 2026P (8% of total GDP), fueled by growing digital population, government support, & increased customer demand; India's public cloud spending is expected to grow at a 27% CAGR for 2021-26, reaching ~USD 18.5 Bn by 2026P**

## Drivers of cloud adoption

Growing customer demand

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Growing digital population

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Favourable government policy

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With IT spending constituting only 1.6% of India's GDP in 2018, nearly half the global average of 3.0%, there is significant headroom for growth of cloud computing in India

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India's cloud adoption is currently at 6.0% which is lagging behind global average of 7.9% and is almost half the US, UK adoption levels of 11.4 %

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## Protean Cloud

Number of sectors – 5 (E-commerce, Aggregators, SaaS Vendors, Manufacturing, Public Sector)

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Certifications – MEITY, PCI-DSS, SOC 2, SOC 3, ISO certifications

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Energy efficient - Made in India

**The Indian cybersecurity market reached ~USD 13.2 Bn in FY23, grown at an FY19-23 CAGR of ~32.2% driven by increase in online data storage and number of online transactions, a risk of rise in cyber attacks, and subsequent stringent regulatory norms**

## Growth drivers

Increased online data and transactions

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Increasing cyber attacks

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Increasing regulatory norms

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The rise in ransomware attacks and increased number of online transactions have heightened cybersecurity awareness and adoption across both large enterprises and SMEs

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BFSI being a highly regulated industry, contributes ~36% to the Indian cybersecurity revenue, owing to increased need for GRC, data protection and privacy

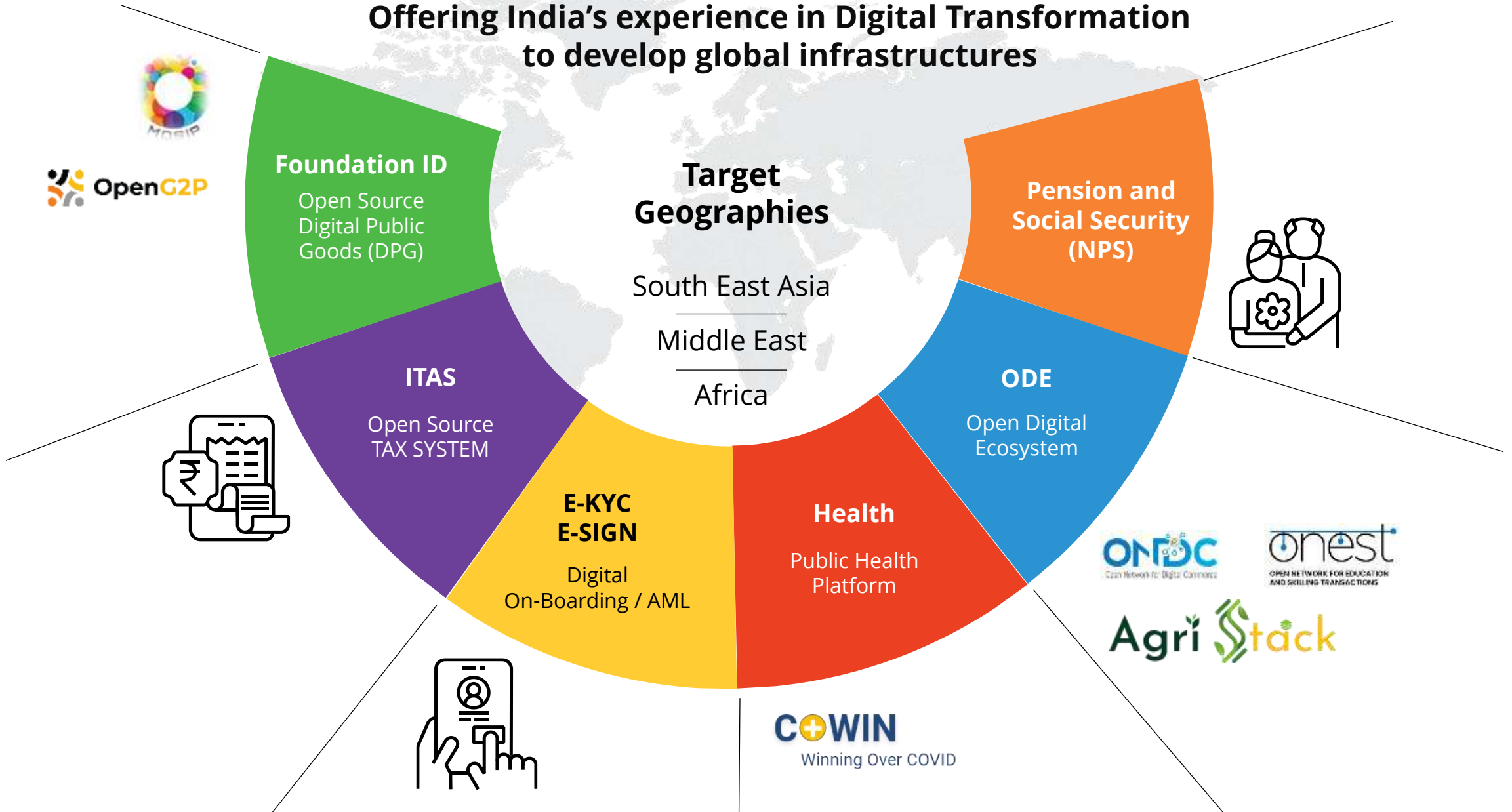
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The Indian cybersecurity services industry generates 80-85% of its revenue from the global market, while the domestic market contributes 15-20%

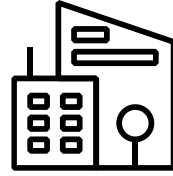


# DPI Components – For International Market

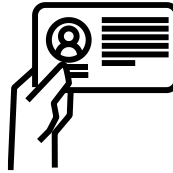
Offering India's experience in Digital Transformation to develop global infrastructures



# Protean's Edge



Pioneers in building Digital Public Infrastructure

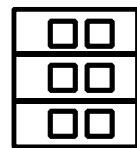


One of the cornerstones of Digital India journey:

- Creating population scale e-governance platforms for taxation and social security (Pension CRA)
- Facilitating critical projects including e-PAN, e-Aadhaar Authentication and TIN
- Enabling digital identity through foundational DPs across Identity, Payments & Data.



Dominant market presence in tax, pension and digital identity service sectors



Facilitating Digital India stack through ONDC and ODEs

# Q3FY25 Update



MD Commentary



Business Highlights



Key Growth Drivers – Quarterly



Financial Performance



Partner's with Pankaj Tripathi



Awards & Accolades

PROTEAN eGOV TECHNOLOGIES LIMITED  
(formerly NSDL e-Governance Infrastructure Limited)



*Looking ahead, Protean remains well-positioned to drive sustainable growth, strong partnerships, and a focus on emerging opportunities in Open Digital Ecosystems ...*



**Suresh Sethi**

Managing Director &  
Chief Executive Officer

*Protean continues to retain its position as a leader in the Digital Public Infrastructure space, delivering yet another resilient quarter. Our tax and pension services have demonstrated steady growth, with pension services recording a robust 12% YoY increase. The encouraging response to initiatives like NPS Vatsalya highlights our ongoing commitment to enhancing financial inclusion.*

*This quarter, we achieved key milestones, including securing the prestigious CKYCRR 2.0 mandate and powering India's first ONDC-enabled e-commerce service integrated on Prasar Bharti's OTT platform, WAVES. These achievements underscore our expertise in leveraging emerging technologies to execute impactful, large-scale projects.*

*Looking ahead, Protean remains well-positioned to drive sustainable growth, strong partnerships, and a focus on emerging opportunities in Open Digital Ecosystems. We remain committed to delivering long-term value to our stakeholders while supporting India's journey towards a digitally inclusive future.*

# Business Highlights



## Existing Segments



Consolidated **revenue from operations** for Q3FY25 stood at **INR 202 crore**.



**Tax Services** The segment revenue grew by 3% YoY mainly on account of gain in Market share from 52.1% in Q3FY24 to 59.2% in Q3FY25 showcasing Protean's strength in PAN business.



**Pension Services** The segment delivered another strong quarter demonstrating a robust growth of 12% YoY. During the quarter, 3.05 million new subscribers were on boarded with more than 600 corporates.



**Identity Services** de-grew by 17% YoY attributable to spike in volumes last year driven by Aadhaar-PAN linkage deadline and introduction of certain government schemes. The company is investing in building value added products like *eSignPro* and *RISE with Protean* under the data stack business and targeting strategic orders from Private and Government sector.



## Key Highlights

- **Won the CKYCRR 2.0 mandate** - Secured a prestigious ₹161 crore mandate from CERSAI, to develop CKYCRR 2.0—the upgraded Central KYC Records Registry, reaffirming Protean's leadership in driving digital transformation and its commitment to empowering India's BFSI sector with innovative, future-ready solutions.
- **Launch of ONDC enabled Buyer Tech on OTT**- Prasar Bharati, India's state owned public broadcaster recently forayed in the OTT space with the launch of WAVES App. Protean is powering this revolutionary breakthrough with an ONDC enabled e-commerce experience.
- **Protean partners with Pankaj Tripathi as Brand Ambassador**—With Pankaj at the forefront, Protean aims to inspire trust and adoption, bridging the gap between robust digital solutions and relatable narratives that enhance ease of living for people

# Key Drivers – Quarterly

(In crore)

## PAN Services



Q3FY24

Q3FY25

Offline Online

Total PANs issued till date 51.5 Cr

## CRA Services



Q3FY24

Q3FY25

New Additions Cumulative

## e-Sign Transactions



Q3FY24

Q3FY25

Cumulative till date 54.1 Cr

## e-KYC Transactions



Q3FY24

Q3FY25

Cumulative till date 192.7 Cr

## Aadhaar Authentication

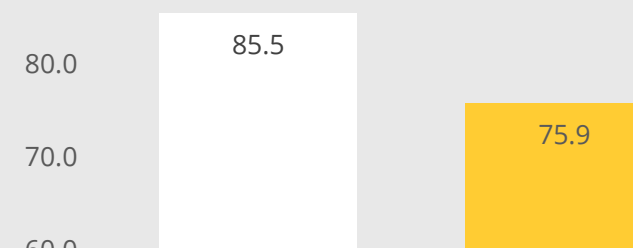


Q3FY24

Q3FY25

Cumulative till date 313.3 Cr

## Online Pan Verifications



Q3FY24

Q3FY25

Cumulative till date 1,351.2 Cr

# Financial Performance

(₹ in crore)

Particulars	Q3FY25	Q3FY24	YoY	Q2FY25	QoQ	9MFY25	9MFY24	YoY
<b>Revenue from Operations</b>	<b>202</b>	<b>204</b>	<b>-1%</b>	<b>220</b>	<b>-8%</b>	<b>619</b>	<b>660</b>	<b>-6%</b>
Other Income	19	29	-35%	14	39%	52	55	-5%
<b>Total Income</b>	<b>221</b>	<b>233</b>	<b>-5%</b>	<b>233</b>	<b>-5%</b>	<b>670</b>	<b>715</b>	<b>-6%</b>
- Tax services	99	97	3%	119	-16%	316	374	-16%
- Pension Services	72	64	12%	70	3%	208	184	13%
- Identity Services	24	29	-17%	24	1%	75	78	-4%
- Others	7	14	-49%	7	-	20	23	-13%
<b>Adj. Operating Profit*</b>	<b>21</b>	<b>21</b>	<b>-</b>	<b>32</b>	<b>-34%</b>	<b>79</b>	<b>93</b>	<b>-15%</b>
<i>Operating Margins</i>	<b>10.3%</b>	<b>10.2%</b>	<b>8 bps</b>	<b>14.4%</b>	<b>-411 bps</b>	<b>12.7%</b>	<b>14.1%</b>	<b>-137 bps</b>
Profit before Tax	29	19	47%	38	-24%	93	104	-11%
Tax	6	4	36%	10	-41%	21	24	-12%
<b>Normalised PAT</b>	<b>23</b>	<b>22</b>	<b>4%</b>	<b>28</b>	<b>-18%</b>	<b>77</b>	<b>89</b>	<b>-13%</b>
<i>PAT Margins</i>	<b>10.4%</b>	<b>9.5%</b>	<b>89 bps</b>	<b>12.0%</b>	<b>-163 bps</b>	<b>11.5%</b>	<b>12.4%</b>	<b>-92 bps</b>

\*Adj. Operating Profit is excluding other income and provision for doubtful debt.

\*Normalised PAT is adjusted for ECL Provisioning impact

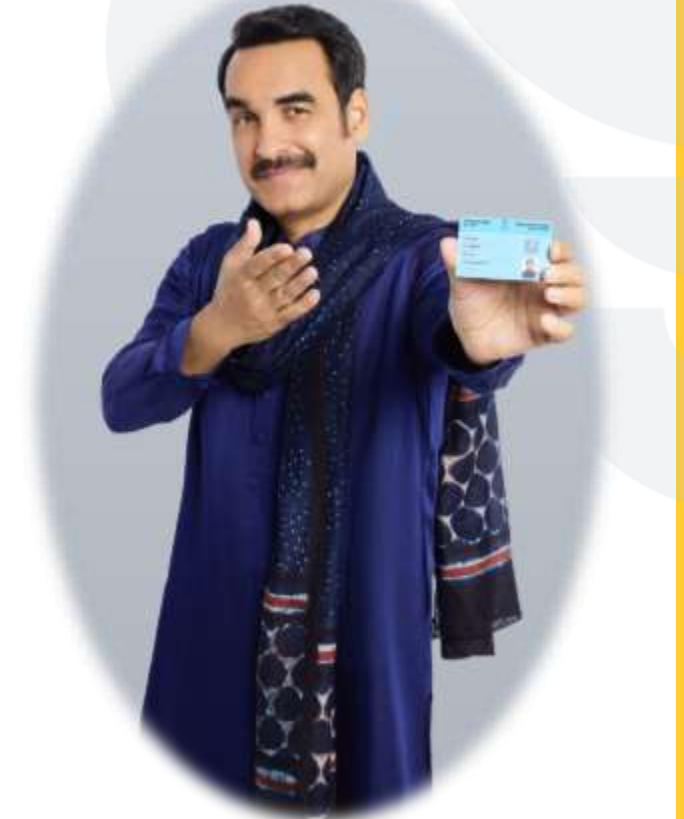
# Protean Partners with Pankaj Tripathi as Brand Ambassador



Protean's **Brand Campaign** celebrates the stories of **Aspirations, Dreams, and Transformations** that defines our nation

Pankaj's humble rise mirrors Protean's **vision of empowering aspirational India**

*Protean ki kahani, Pankaj ki zubani!*





# Awards & Accolades

## Best fintech initiative award for "Protean Life" by IFTA



India's **only all-in-one platform** designed to **streamline sustainability initiatives** from inception to completion.

## Gold & platinum award from LACP for "Annual Report"



*Annual Report that not only informs, but inspires*

### Our Double-Wins:



**Gold Award** |  
Competition of  
Annual Reporting



**Platinum Award** |  
Sub-Category of  
ESG (within the  
Annual Report)

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# Thank You

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