

November 28, 2018

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

The National Stock Exchange of India Limited,
Exchange Plaza, 3rd Floor,
Plot No. C/1, "G" Block,
Bandra Kurla Complex,
Bandra East,
Mumbai 400 051

Security Code: 504067

Symbol: ZENSARTECH

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

Dear Sir/Madam,

This has reference to our communication dated November 21, 2018 regarding "Zensar Investor and Analyst Day" scheduled on November 28, 2018 in Mumbai.

We have enclosed copies of the presentations for the event.

Kindly take the same on record.

Thanking you,
Yours faithfully,

For **Zensar Technologies Limited**



Gaurav Tongia
Company Secretary



Encl: As above

Zensar Investor & Analyst Day 2018

Sandeep Kishore | CEO & MD

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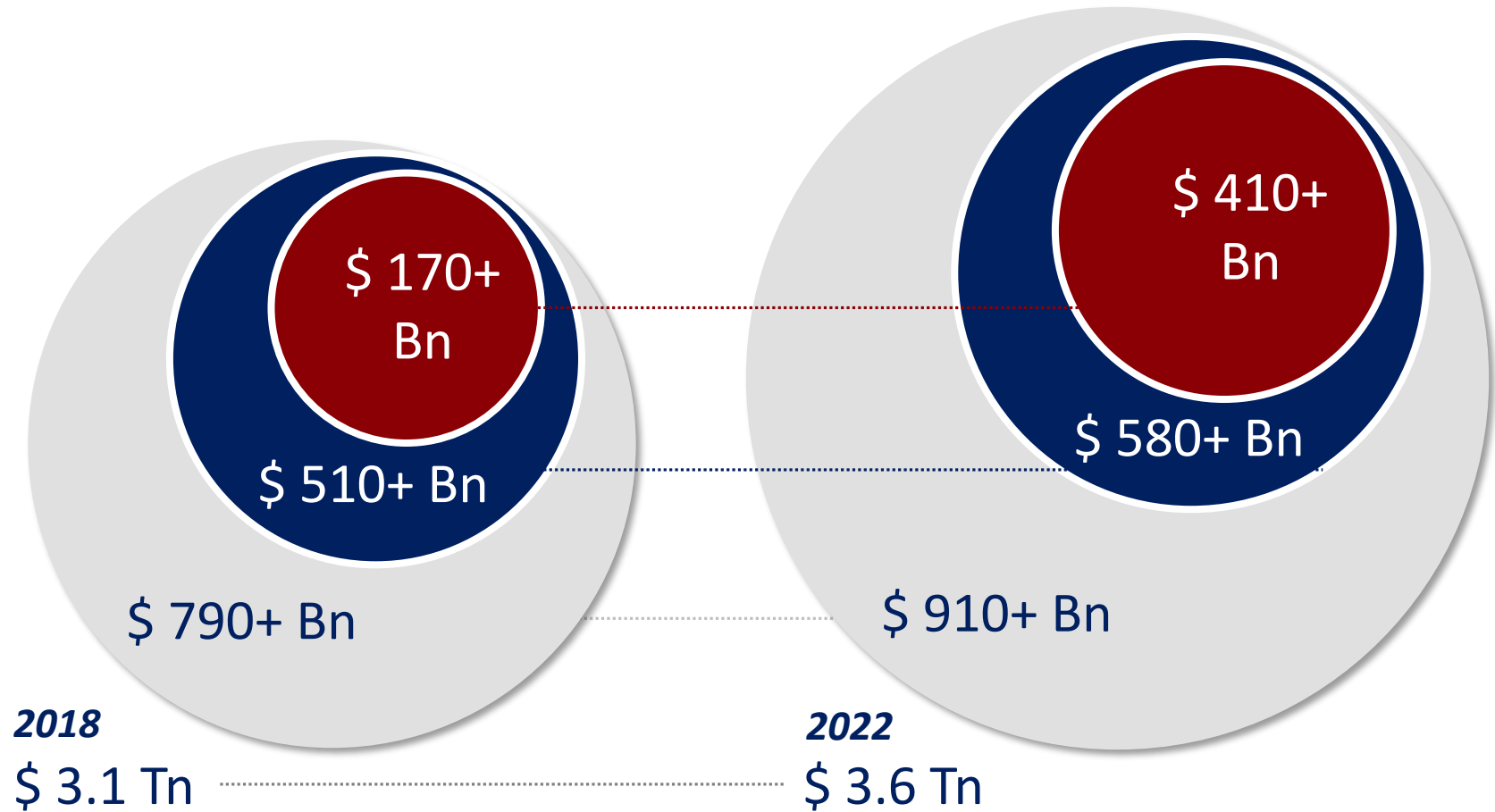
State of the Industry – *The Turn to Digital*

3.8% CAGR

Overall Global Technology

24.6% CAGR

Digital



Source: Industry Sources

■ Technology Spend in Focus Verticals ■ Technology Spend in Focus Verticals and Regions ■ Digital Spend in Focus Verticals and Regions

2.5+ years Ago,
we embarked on a bold journey to make Zensar

100% *Living Digital
Enterprise*

100% Living Digital Enterprise

34 Native Mobile, Cloud, Digital Platforms

650+ Releases

1.5 M Downloads

50+ Business Processes Digitized

100% Adoption by Associates

Marketing

CMO Dashboard, Realtime effectiveness of digital marketing campaigns

Finance

P&L tracking, Client, Geo, Project level, Budgeting, Automated Pricing for Deals, Timesheet automation

Human Resources

Onboarding, Training, Learning, Mentoring, Associate 360

Sales

Realtime dashboard; Analytics, pipelines tracking

Project Delivery & Management

Client dashboard, ZenAnalytica, Vinci, Cloud Orchestration

IT

Realtime CIO Dashboard ; Opex, Capex, 100% Cloud, Automation, 100% IT Asset Traceability ; Business IT SLA

Talent Supply Chain,

Resource Management, Visa, Lateral and Fresher hiring, real time demand and supply mapping

Living Digital for our Clients – RoD, Return on Digital™

100% of \$10M+ Deal Wins

15%+ of total clients have RoD platforms

Employee engagement & collaboration platforms

Operating & productivity platforms

*CXOs, Execs
platforms & dashboards*

*Customers & Partners
engagement platforms*



RoD | Mobile first | Cloud first | Secured | Ready-to-deploy

We have built a great and balanced Management Team



Sandeep Kishore
CEO & MD



Malay Verma
Head, US Region



Durai Velan
Head, US Retail



Chaitanya Rajebahadur
Head, Europe



Harish Lala
Head, Africa



Venky Ramanan
Head, Platinum Accounts



Harjott Atrii
Head – CIS



Prameela Kalive
Head, Global Delivery -
Applications & Digital Services



Harish Gala
Head, Strategic Project Unit



Sanjeev Malik
Head, Strategic
Partnerships, Large Deals



Ajay Bhandari
CCDO



Navneet Khandelwal
CFO



Vivek Ranjan
CHRO

Acquired competencies to bridge the capabilities gap



Experience Design
Digital Agency

Digital Supply Chain
Leadership in Omni channel

Guidewire Implementation
P&C Insurance Carriers

Experience Design
Digital Agency

Nov'16

Apr'17

Apr'18

Aug'18

Winning at Scale

Large & TPA Led deals
\$ 20 Mn+ Deal Team

Competencies

New Capability Practice
ZenLabs & Alliances

Delivery at Scale

Automation led
Delivery Factory Model
Talent Transformation

Three in a Box Model

Client Relationship, Digital
Evangelists & Delivery

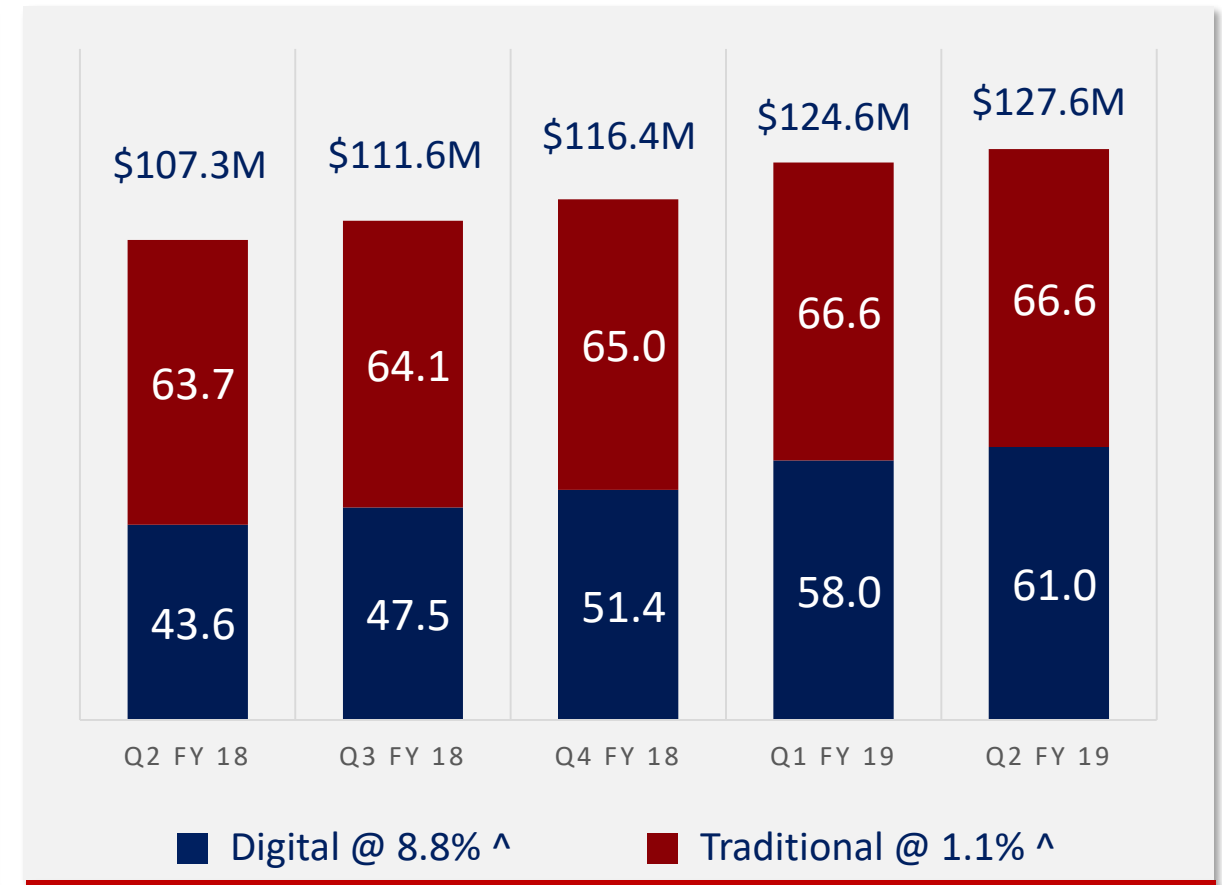
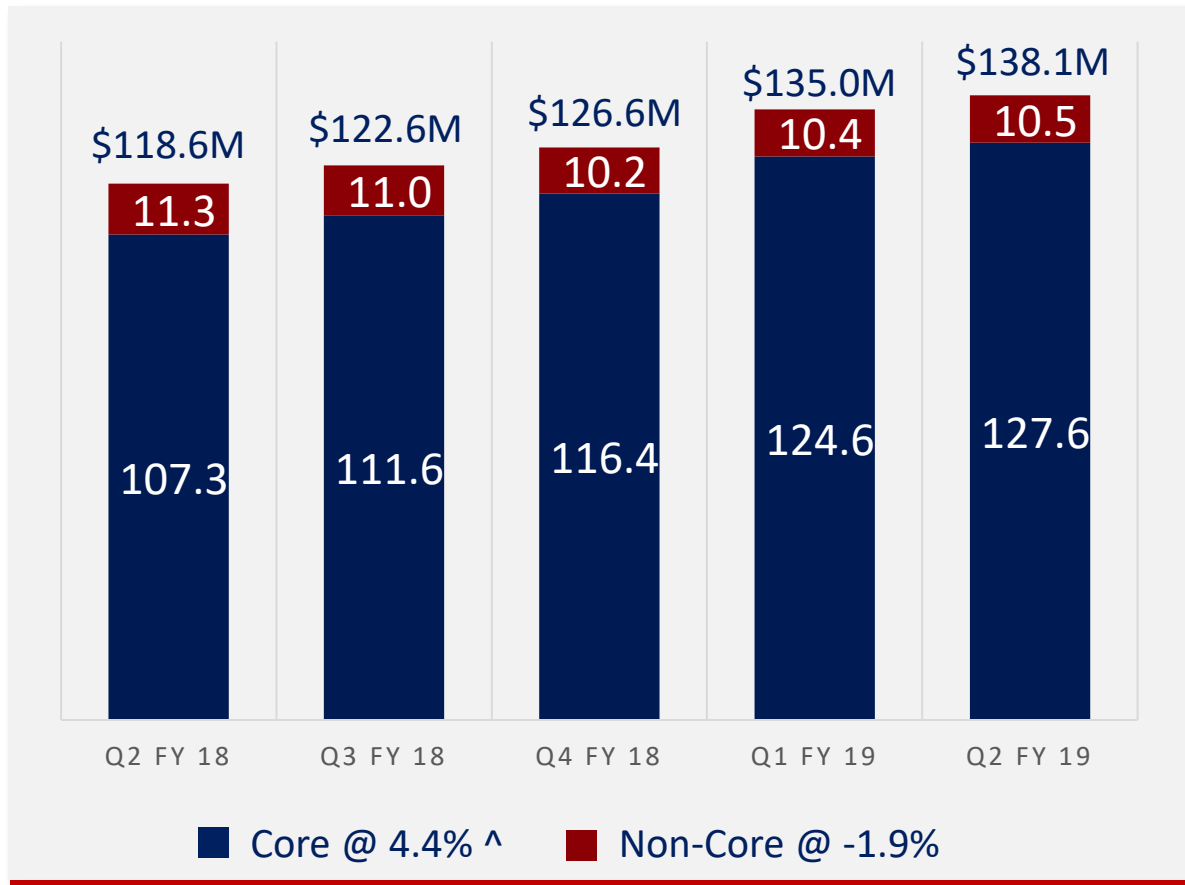
Enabling Organizations

Finance, HR, Legal – Corp. and
local presence in regions

Building greater business momentum

**Total Revenue @ 3.9% CQGR,
@16.5% YoY**

**Core Revenue @ 4.4% CQGR, @ 18.8%
YoY ; Digital Revenue @ 39.8 % YoY**



Thru' Key Wins



\$100 Mn

Fortune 100
Technology Brand



\$79 Mn

City of San Diego



\$100 Mn

Global Diversified Brand



\$24 Mn

Discrete Mfg. Company



\$ 43 Mn

Medical Device Mfg.



\$ 24 Mn

Developmental &
Infra Bank

\$800 Mn+
TCV wins over the
last 18 months

Revenue

\$138.1 Million

QoQ 2.3%, YoY 16.5%

EBIDTA

\$17.8M

QoQ -3.1%,
YoY 27.1%

PAT

\$13.3M

QoQ 8.6%,
YoY 36.7%

Innovation Index

28

Patents Filed



Digital Revenue

44.2%

Q2 FY19



8 straight quarters of digital revenue growth

\$5M+ Clients

Q2FY19 20

Q1FY19 19

Q2FY18 14

\$ 10 Million + Clients :

7 (Net increase of 2)



Headcount

Q2 FY 19
9482

Q1 FY 19
9122

Q2 FY18
8414

9482

Q2 FY19

27.1% Women
Associates

12.5% Global
Associates

13 New Delivery Facilities

24 Months



Recognitions



HARVARD
BUSINESS SCHOOL

Forbes

Gartner®

skillsoft▶▶

FORRESTER®

 IDC
Analyze the Future

*
ISG™

imagine your future®

 Everest Group®
From **insight** to **action**.

AVASANT

A photograph of a surfer riding a large, curling wave. The surfer is in the center-left of the frame, wearing a dark wetsuit and a white surfboard. The water is a vibrant blue-green color, and the wave is breaking over the surfer's head. The background is a bright, hazy sky.

The world now presents opportunities for Digital Disruption

01

Customer Journey is the new value chain

DX spend at \$ 1.7 Trillion*

02

Data is Central to Digital Transformation

Business value derived from Artificial Intelligence at \$ 1.2 Trillion*

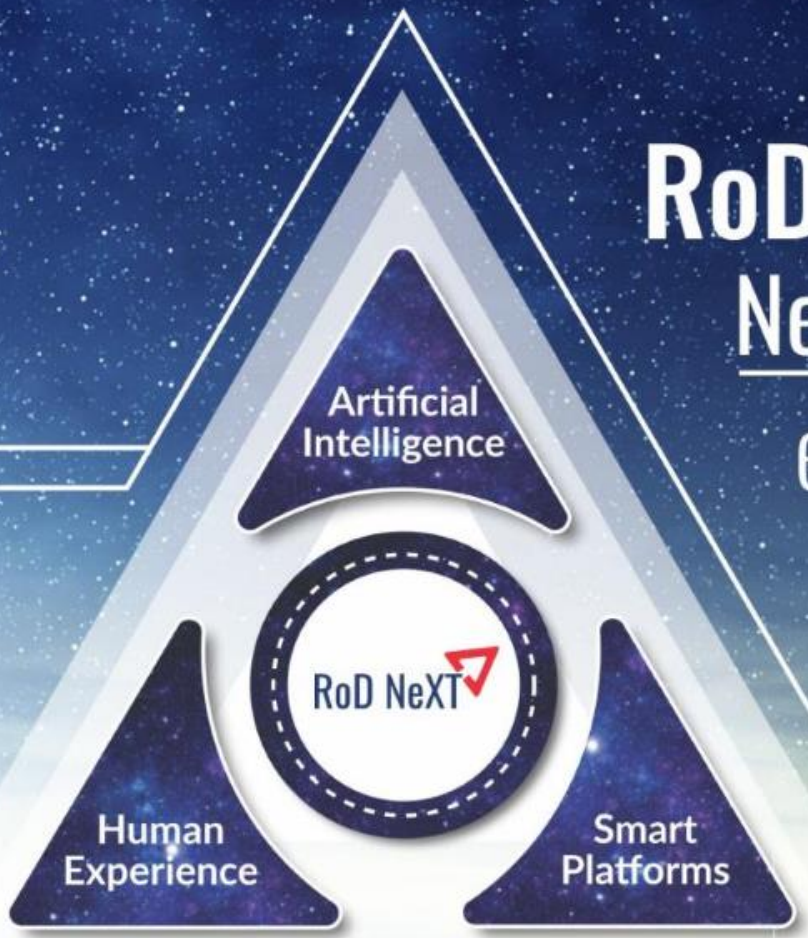
03

Enterprise wide Digital Enablement

Cloud and Platform spend at \$ 530 Billion*

RoD NeXT

New and
eXponential
Technologies





Digital Zensar



**Core Business and Growth
Accounts**



**Larger Deals and
@ Scale Business**



**Competencies –
Organic and M&A**



Innovation



RoD NeXT

Thank you

Zensar Investor & Analyst Day 2018

Harjott Atrii | Global Head, CIS Business

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How We See the Cloud Market is Changing

MARKET SIZE

 **Cloud**
\$155 bn

 **DWS**
\$49 bn

 **Networking**
\$49 bn

 **Cybersecurity**
\$47 bn

TRENDS

Digital Enterprise

- ✓ Digital Singularity- Experience Centric & Outcome based
- ✓ XaaS- Data, Risk & Compliance, Enterprise function
- ✓ Digital Run & Operate-Next Gen TOM (Target Operating Model)

Data Center | Cloud

- ✓ Public Cloud dominance continues- IaaS /PaaS
- ✓ SDI and HCI get mainstream adoption IaaS for MPC
- ✓ “Cloud first” to “Cloud Only”

Intelligent Automation

- ✓ Build vs Buy : complex paradigm for selection of automation tools
- ✓ NLP, Autonomics, CV, Machine/Deep Learning, VA, Neural Networks
- ✓ Multi Cloud is the way forward- Cloud integration

Digital Workplace Services

- ✓ Device diversity and Device Explosion
- ✓ Increased adoption of WaaS

SOURCING IMPERATIVES

1 As-a-service growth outpacing traditional outsourcing by a big margin (26% vs 8%)

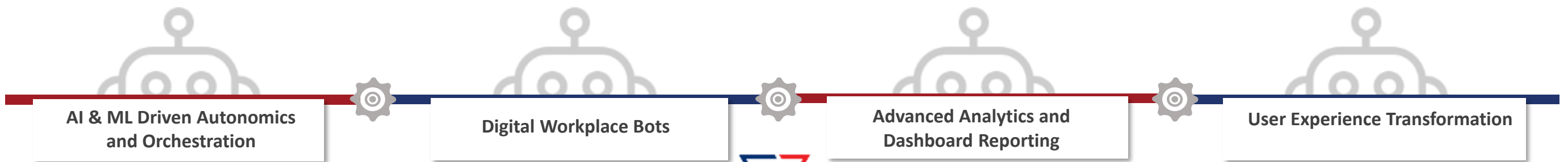
2 Outcome-based pricing expected to increase to 20% of commercial models within 2 years

3 Up to 35% of IT spend to come from business units rather than traditional IT

CIS Services Catalogue: Autonomics led Agile Infrastructure Services

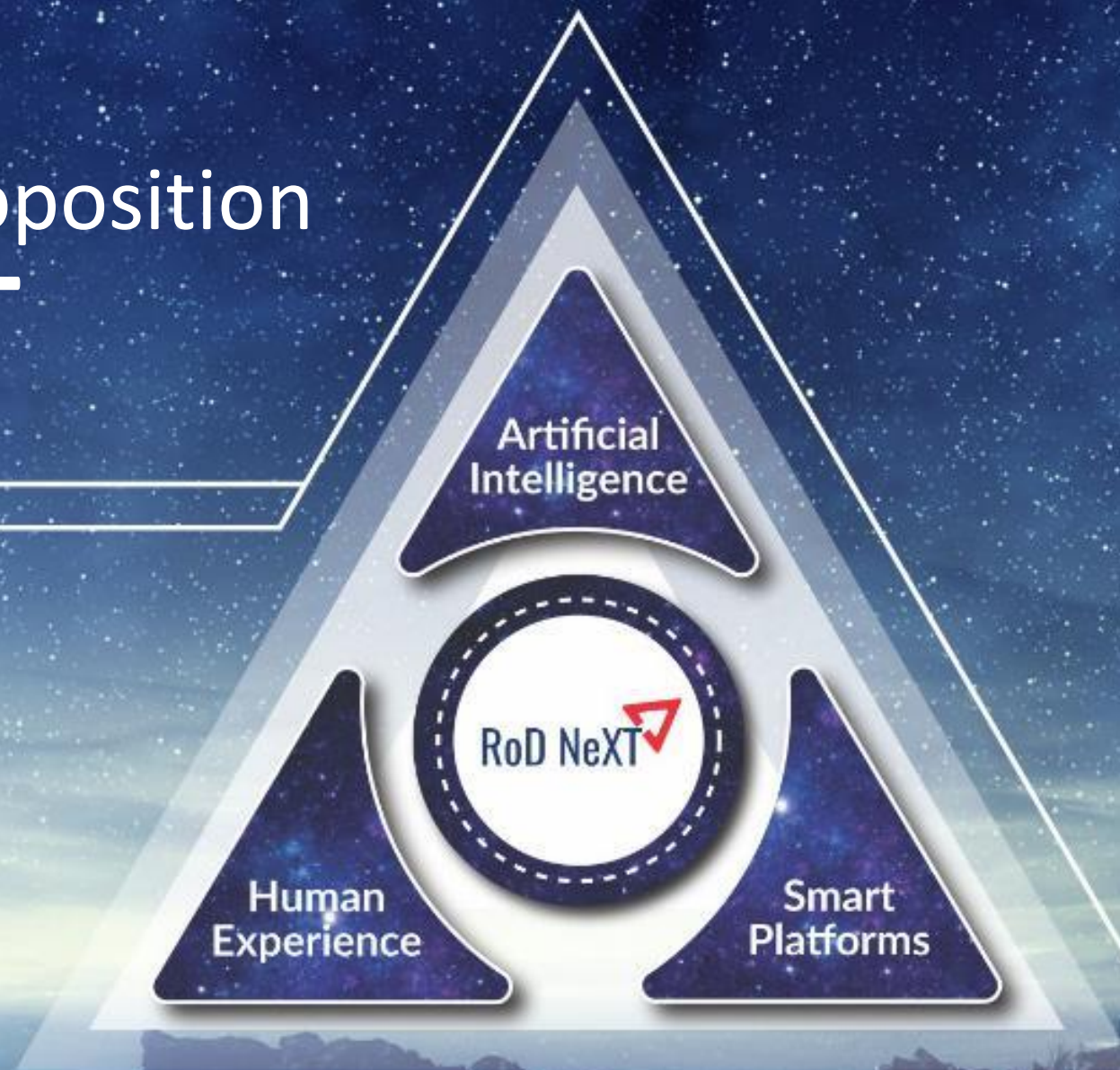


Automation-as-a-Service



Powered By "The Vinci™" - Digital Ready Autonomics Platform

Our Value Proposition RoD NeXT



Business Impact Delivered Through RoD NeXT

Experience Zone

40% 70% 65%

Automation

Self-heal

Improved
Human Experience

Artificial
Intelligence

RoD NeXT

Human
Experience

Smart
Platforms

Value Zone

60% 100% 30%

Alerts Reduction

Auto-ticketing*

Ticket Prevention

Enablement Zone by The Vinci

70% 45% 65%

\$ Savings

Productivity

Faster GTM

Proof Points : Structured growth | Key Wins in FY19



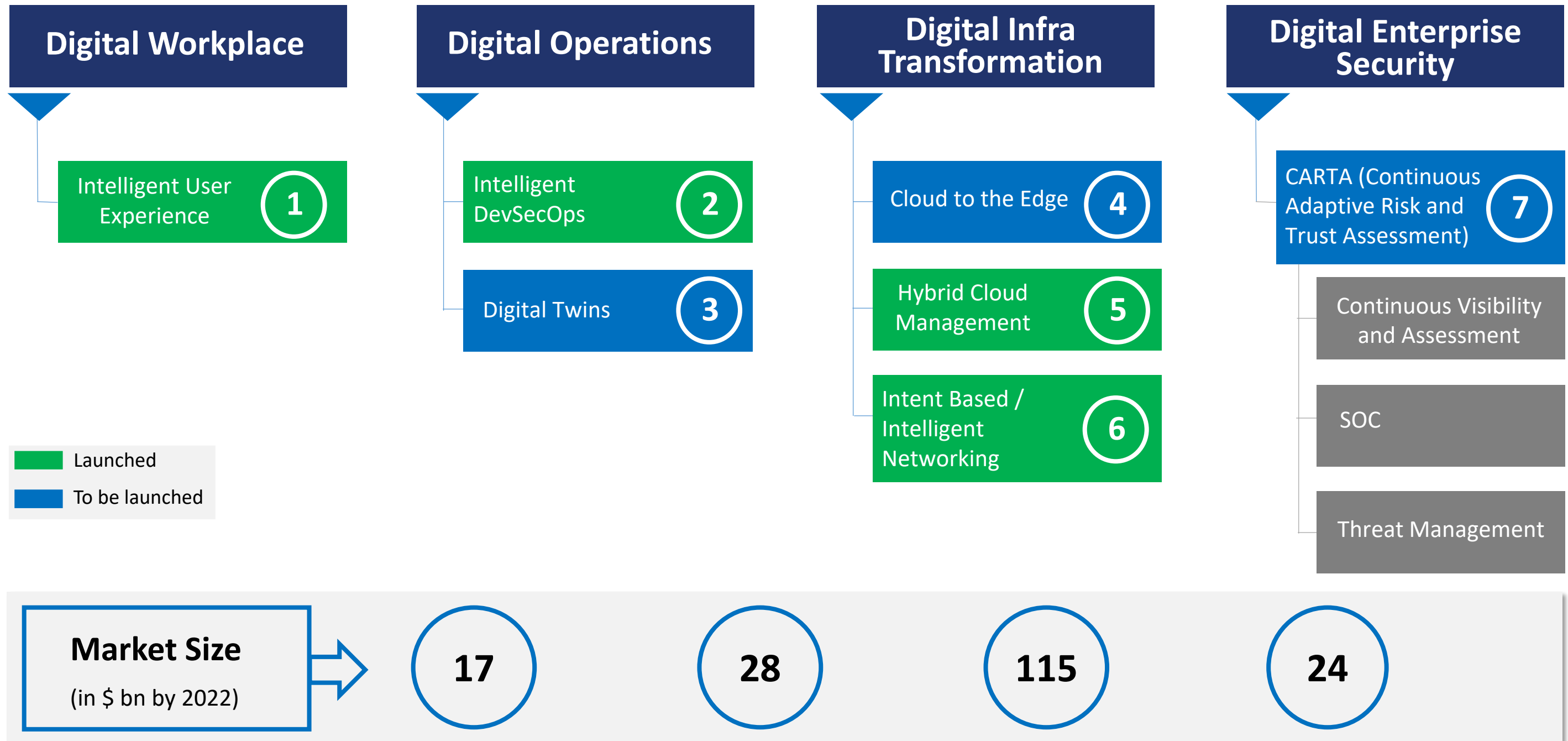
	Deal Size : \$ 79 mn Competition : Global Tier-1 IT service provider	Global-1000 medical devices firm	Deal Size : \$ 43 mn Competition : Tier-1 IOP
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Global 2000 international financial institution	Deal Size : \$ 24 mn Competition : Tier-1 IOP	Fortune 500 Hitech and Manufacturing Company	Deal Size : \$ 15 mn Competition : Global Tier-1 IT Service Provide
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Leading Europe investment management firm	Deal Size : \$ 10 mn Competition : Mid-cap IOP	Top 5 Global aerospace and defence company	Deal Size : \$ 15 mn Competition : Tier-1 and Tier-2 IOPs
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Presenting : CIS's 7 big bets | Emerging avenues of growth



Next Gen Delivery Model



Thank you

Zensar Investor & Analyst Day 2018

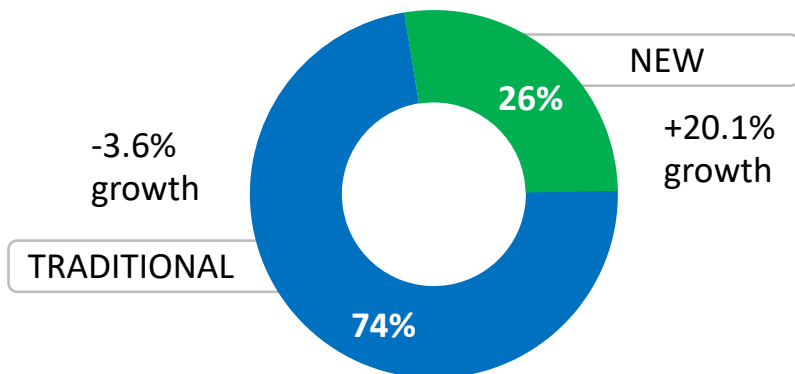
Prameela Kalive | Head, Applications &
Digital Solutions

Tom Wood | Co-Founder & Managing
Partner at Foolproof –
A Zensar Company

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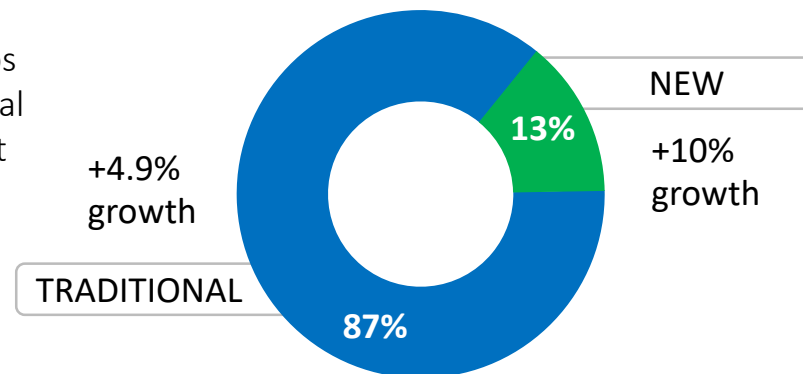
Transition from managing traditional services to driving Digital Transformation programs delivering business outcomes

IT services industry growth & mix
Traditional vs. Digital (New)



Application Services market is large and growing
(\$143B TAM @5.6% CAGR)

'New' Traditional apps services remain critical as organizations must maintain complex legacy apps



We are aligned to client priorities and spend

Optimization of RTB Systems to fund **Digital Transformation Programs**

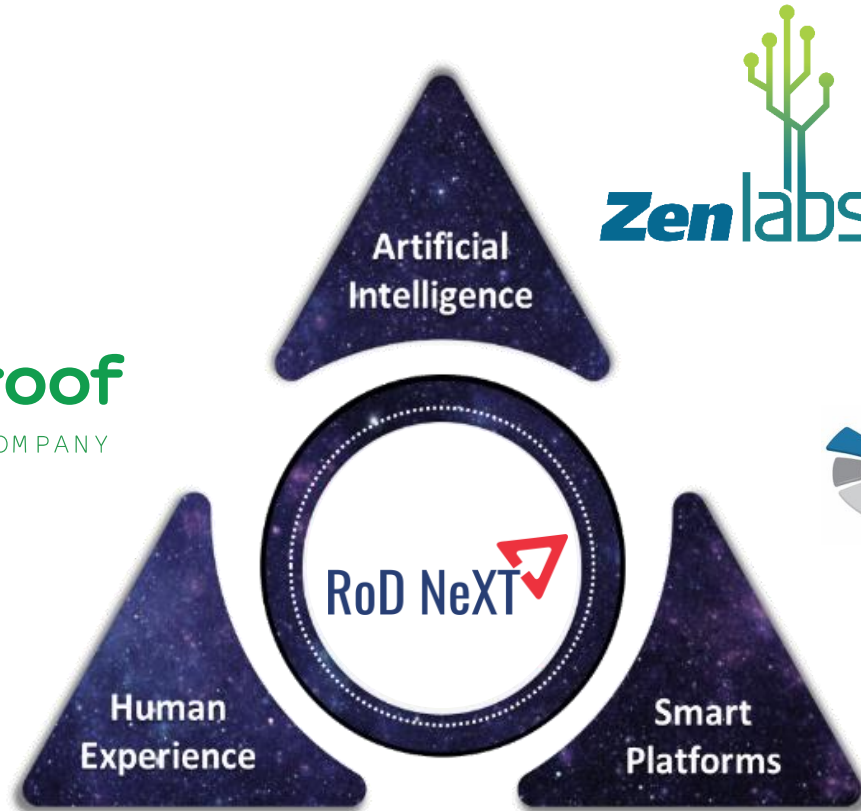
Significant investments in **Customer Experience Transformation**

Disruptive **Business Models and Connected Ecosystems**

Service Delivery Transformation: Powered by our Digital Focus



Connected Digital Ecosystems driven by Human experience transformation



Innovation powered by new technologies

Smart platforms delivering automation, agility and modernization.

Bringing together **Smart Platforms, Business Solutions** and **Innovative Technology Services** to deliver **Human Experience Transformation**



Transformation Services

*Platform driven
Transformation services*



Digital Skills @ Scale

*Digital academy,
Innovative technologies*



Strategic Acquisitions

*Foolproof, Indigo Slate,
Cynosure, Keystone*



Smart Platforms

*ROD NeXT Platform
Solutions across Practices*



Digital Studios

*ZenLabs, Client
Innovation Centers*



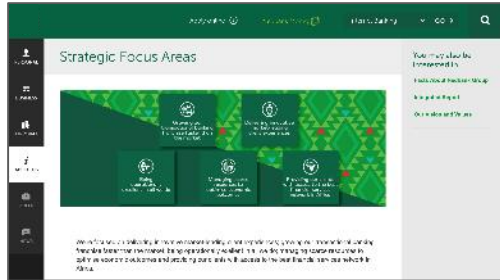
Strategic Alliances

*Oracle, Adobe,
SFDC, Microsoft*

Delivering Digital led Transformation Programs

Key Success Stories

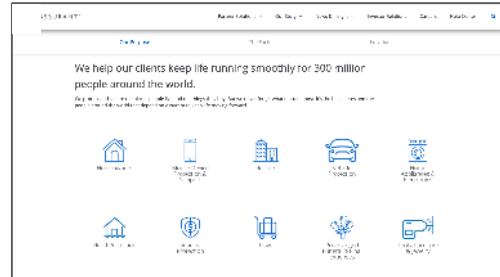
A Leading Bank



Partner for their Digital Transformation Journey

Human experience transformation powered by Digital platforms

A Fortune 500 Insurance Firm



Business Transformation Partner

Transformation of Core Systems through digital

Global Medical Devices Manufacturer



Technology Transformation Partner

Integrated Multi Services
Multi year
Transformation Program

Global Diversified Brand



Strategic ADM Partner

Digital led
Transformation Program

Delivering Business Value through Digital led Transformation Programs

Delivering Digital led Transformation Programs

Key Success Stories

Global Online Gaming Company



Most Profitable Global Digital Studio

20% improvement in speed-to-market through Automation

Global Financial Services Leader



User Research and Design Lab

Unique model of Design Studio

Global Oil & Gas Leader



Digital Transformation Platform

\$7.5 m savings in the year

Hi-Tech Software Products



Digital Marketing for new Product launches

Experience Design for 40+ Brands

Transforming Human Experiences for all stakeholders through Intelligent and Smart Platforms

Industry Recognition



Easy Pleasy Award for Digital
Insurtech Awards 2017 in Customer
Experience category



Award winning product
"Hiut Music"



Nominated for Utility Week Star
Awards UK and NJUG UK Award in
Health and Safety Category



Foolproof: Top 10 Design
and Build Agencies



Robotic Process Automation
Agile/DevOps Service Providers



Forrester Now Tech Commerce
Service Providers



Retail domain for digital
platform led services

Our Big Bets for Growth @ Scale



Multi year
Transformation programs
driving SCALE &
MARGINS



Platform Driven
Service Delivery
driving AGILITY
&
AUTOMATION



Talent Supply Chain
Transformation
driving SPEED



ROD Next enabled
Digital Transformation
driving INNOVATION

Thank you

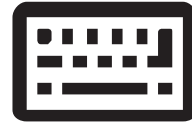
Zensar Investor & Analyst Day 2018

Durai Velan | Head, Retail Business

Ravi Joshi | Co-Founder & Managing
Partner at Keystone Logic - A Zensar
Company

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30+
CUSTOMERS



DIGITAL TRANSFORMATION

10,000+ stores and more than **5M+ SKUs**

Digital Supply Chain Systems transformation spanning

close to 10M+ transactions/day

8+
Years of Average
Domain Consultant
Experience

4 of Top 10 Retailers

10 of Top 20 Fashion

4 of Fastest Growing 50



40% Lower tickets in omni channel thru Automation



87 Client facing applications moved to Cloud



60% Faster GTM for new products & features for major retailers

#1

Retailers under siege – Everybody has to compete with Amazon or perish

BUSINESS CONTINUITY

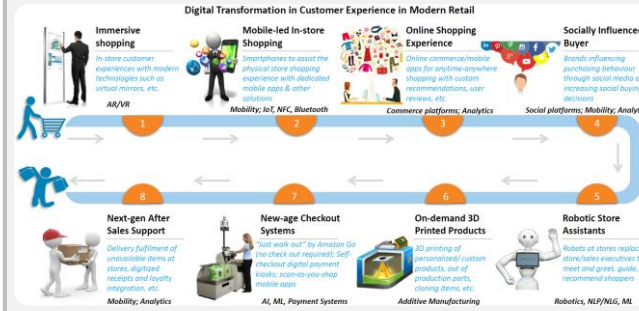


- Begin 20th century
- ~1950
- ~1995
- Now
- First retailers with self service
- Opening of hypermarkets eg. Tesco, Walmart, Auchan, ...
- First modern e-commerce:
 - Amazon.com
 - Ebay
 - Zappos
- Best practices still in development

#2

Digital technologies transforming customer experience at every touch point

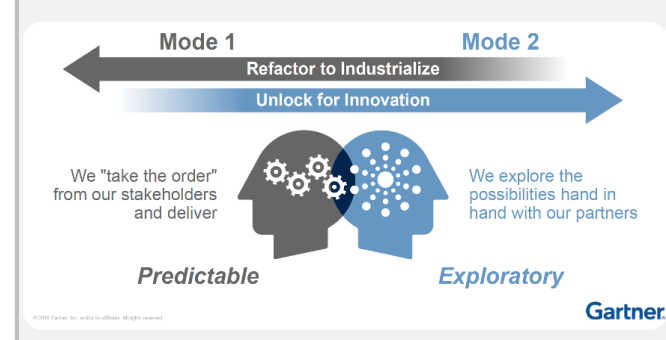
TECHNOLOGY DISCONTINUITY



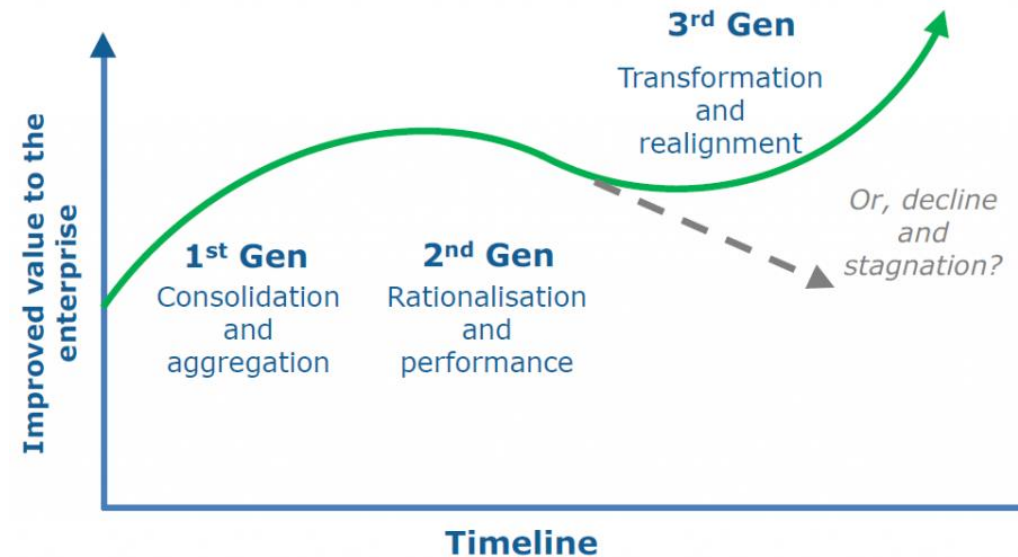
#3

Shift in service model to Automation & Agile

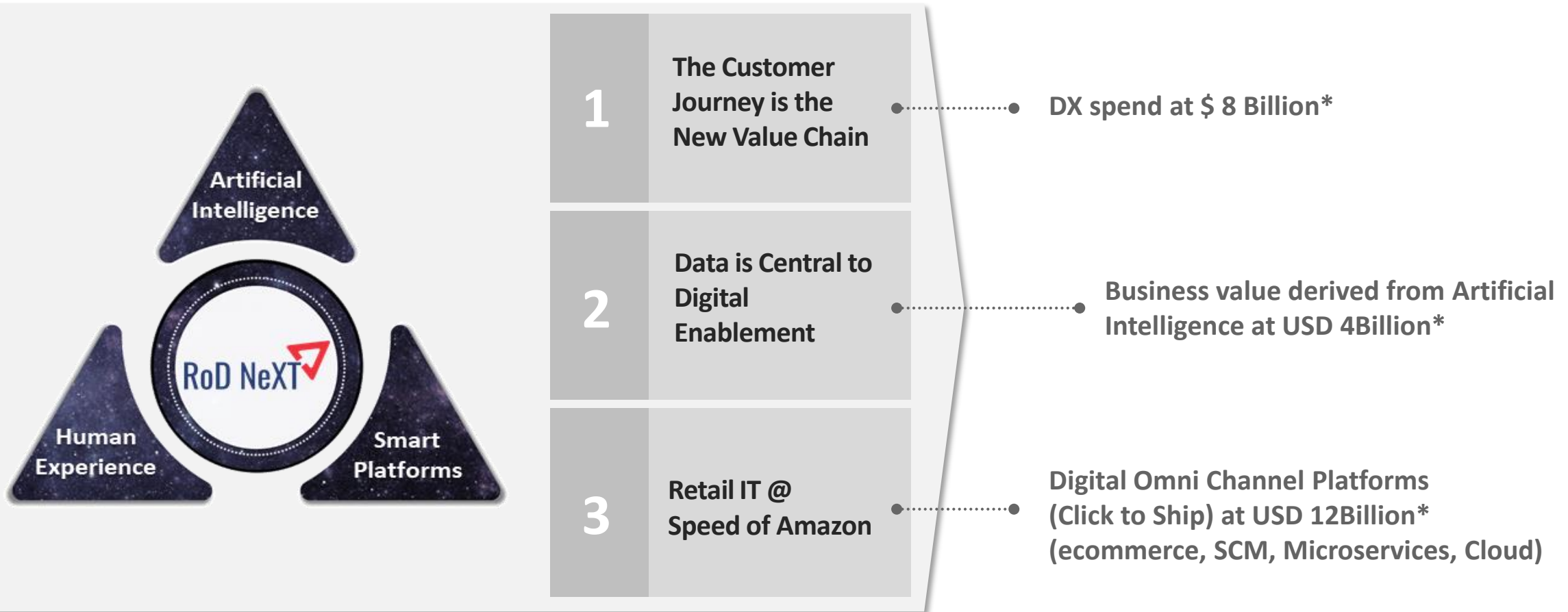
IT SERVICE DISCONTINUITY



Disruptions will create new winners



The Market Now Presents Opportunities for Disruptive Digital Imperative



*Industry Data: IDC, Gartner

..Making Targeted Acquisition to Pivot to an Experience Era

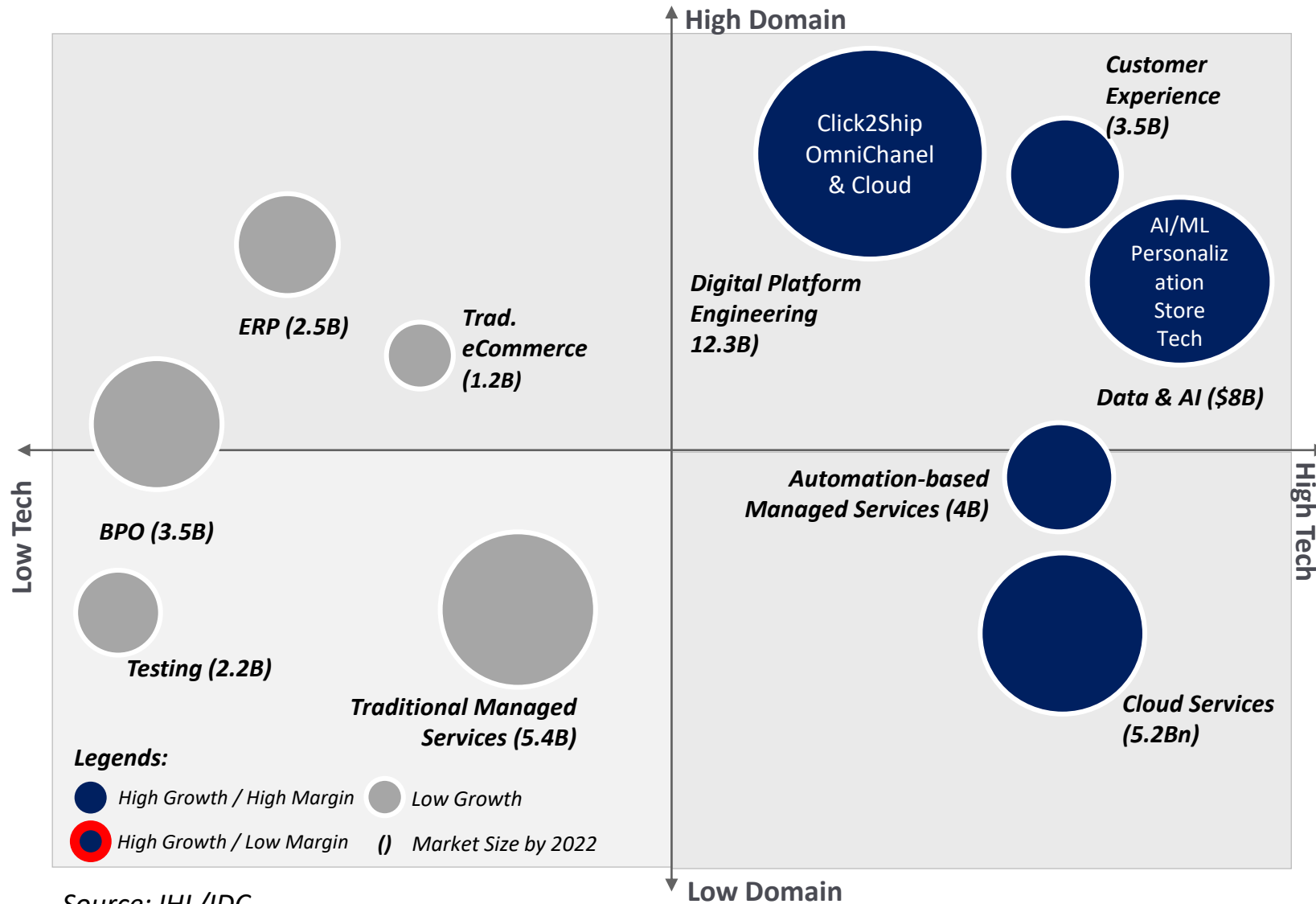
From Core...

...To Digital Solutions + Value Chain Enhancements



* Zinnov Zones for Retail Digital Services – 2018
+ IHL Services Retail Trends

..Making the Right Bets



Source: IHL/IDC

...Winning Against the Market Leaders



Leading US Departmental Store *Digital Transformation*

Core partner across all aspects of digital transformation from ecommerce, supply chain, mobility to personalization

Leading Fashion Retailer *Unified e-commerce experience*

Implemented end to end e-commerce platform, 2.5M+ Orders handled per month, 35M revenue generated in a Day



Global Retail Technology Leader *Digital Product Engineering*

Building Cloud based Digital Platforms for end to end retail service management

Major US Grocery Leader *Next Generation Fulfillment Solution*

Implementation partner for fulfillment systems transformation helping drive enhanced customer experience and service levels



New Logos Won in High Growth Retail



H1 Order Booking



100M+ in pipeline



...Winning Recognition from Leading Analysts



Gartner

Zensar in Global Digital
Commerce Providers list



zinnov™
ZONES

Zensar in “Leadership Zone”
in Retail Digital Services



FROST
&
SULLIVAN

Customer-Centric Vision
for Personalized Engagement

Thank you

www.zensar.com | © Zensar Technologies 2018

Zensar Investor & Analyst Day 2018

Venky Ramanan | Head, Platinum Accounts

Dr. Ullas Nambiar | VP & CTO

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Hi-Tech Business: Market Segments & Performance



**HiTech Manufacturers
(OEM)**



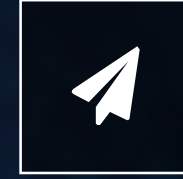
Semi-Conductor



**Independent Service
Vendors (ISV)**



Medical Devices



**Tech-driven Travel
& Hospitality**

50%

% of CIOs reporting IT Budget increase over last year across these industries¹

4%

Approx. % of revenue is the average IT Budget¹

8+

Approx. Gross Value Added (USD Trillion) per year²

2.4 T

Est. Spend (USD Trillion) on Next Gen IT Tech by end of 2021 (Currently \$1.14Tr)³

Sources:

¹Deloitte - Technology budgets: from value preservation to value creation, CIO Insider, November 2017 Deloitte report

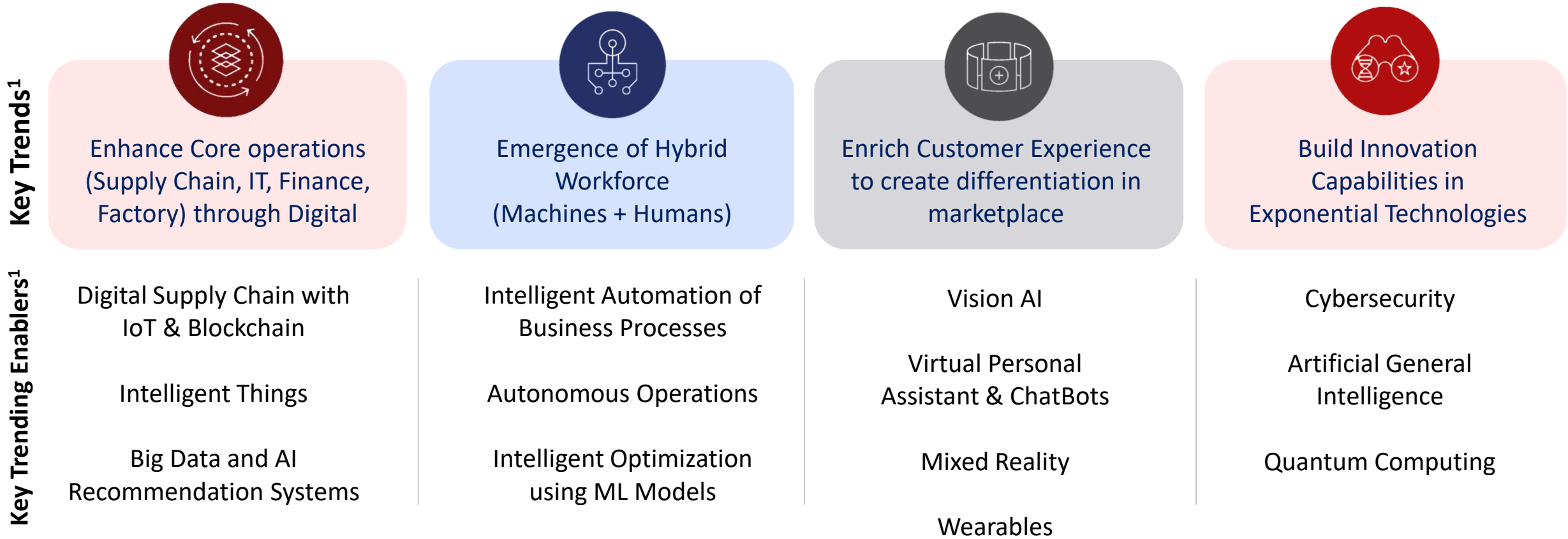
²Statista - Countries with the largest GDP

²NSF - Industry technology and global marketplace

²UNIDO - Industrial Development Report 2018

³Deloitte – Exponential Technologies in Manufacturing

Hi-Tech Business: Key Trends in Market

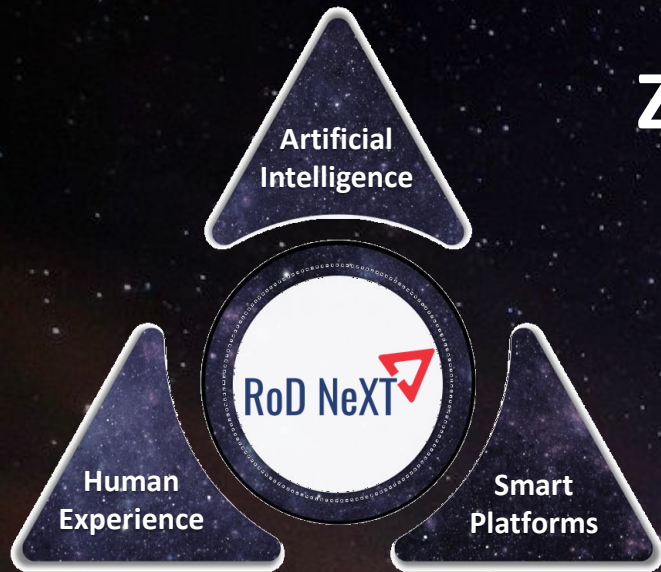


Nearly 90% of managers anticipate that digital trends will disrupt their industries significantly²

Source:

¹Tech Trends 2018 – Deloitte Report

²Exponential Technologies in Manufacturing – Deloitte Report



Zensar's Future Ready Offerings

enabled by

RoD NeXT

for Hi-Tech Enterprises

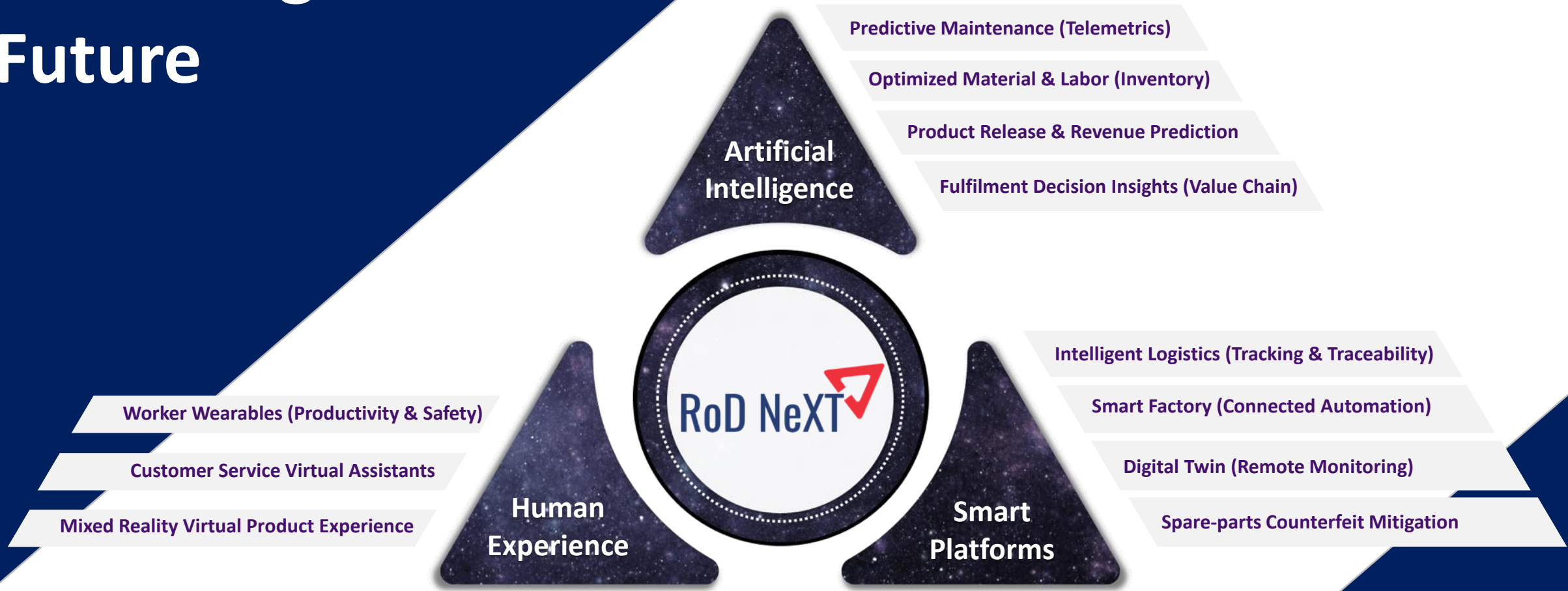
Digital platforms

Digital assets

Partnerships

Tech
foundation

Delivering the Future



Zensar's Future-proof Ecosystem for Hi-Tech Enterprises



Tech Foundation	Partnerships	Digital Assets	Digital Platforms
<p>CoEs of AI, Blockchain, IoT</p> <hr/> <p>Industry Services Group</p> <hr/> <p>Intelligent Automation</p> <hr/> <p>Innovation Framework</p> <hr/> <p>AR/VR/MR Experience Centers</p>	<p>IoT, Blockchain and AI</p> <p> </p> <p></p> <hr/> <p>Operations</p> <p> </p> <p> </p> <hr/> <p>Customer Experience /Digital Experience</p> <p></p>	<p></p> <p>R&D Unit (DSIR) - Experience Center - Patents/IP</p> <hr/> <p> A ZENSAR COMPANY</p> <p>Digital Supply Chain</p> <hr/> <p> A ZENSAR COMPANY</p> <p>Digital Experience</p> <hr/> <p> A ZENSAR COMPANY</p> <p>Digital Customer Experience</p>	<p></p> <p></p> <p></p> <p></p> <p>ZeVA 2.0 Smart-I ZenROD</p>

Aligned for enabling exponential transformation



Mentioned in
Competitive Landscape:
Consulting & System Integration
Service Providers for Robotic
Process Automation

Recognized in
Gartner Market Guide
for Salesforce
Implementation
Services



Disruptor
Intelligent Automation
Services Radarview™ 2018



Major Contender
(for 2nd consecutive year)
Digital Workplace Service
Market Trends and PEAK
Matrix™ Assessment

Aspirant
Enterprise QA Services PEAK
Matrix™ Assessment 2018:
Quality Assurance to Brand
Assurance: AI Driving Evolution



"Zensar's participation in the Oracle Cloud MSP program underscores their skills and expertise with Oracle Cloud Platform and enables us to work in tandem to provide the services needed to accelerate customers' time to value and success in the Cloud"

Sanjay Sinha, Vice President,
Platform Products, Oracle



"Zensar has a clear IOT vision and strategy. With this partnership, we look forward to jointly addressing new industries and geographies"

Kalyan Sridhar, VP and Country Head,
PTC India



"Partnering with trusted organizations like Zensar, with proven expertise in helping many large companies achieve results, will help our clients remain agile as they continue to deliver optimal customer experiences"

Ken Nicolson, Vice President,
Global Alliances, Pegasystems

Endorsements of our strategy and vision by the analysts and our partners

Aggressive growth anchored by investments in Digital by FY 21

Tiger teams charter to win large global transformative deals

Global Expansion aligned with strategic priorities of customers

Aggressively adding new logos of leaders/pioneers in their industry segments



Zensar's first \$100M TCV Deal with a Fortune 100 Technology Company

Large Multi-year Multi-million deal in Cloud Computing Services for a medical equipment producer and distributor

Multi-year Multi-million deals in Digital Customer Listening, and Digitization & Digital Transformation in Supply Chain with a Hi-Tech Manufacturing Leader



First Near-shore Delivery Center in USA in Research Triangle Park (RTP)

Local Presence to expand in Europe

Expanded businesses globally in Mexico and Czech Republic



Fortune 50 American Multinational Technology Company

Fortune 50 American Multinational Technology Company that specializes in Internet-related services and products

Thank you

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Zensar Investor & Analyst Day 2018

Malay Verma | Head, US Sales

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Focus: Tier 1,2 P&C Insurance carrier & Banks

Global Insurance Market Overview



Global IT Spend in BFS Market



1. GWP – Gross Written Premium

Insurance

- US as a leading destination for growth
- US represents 42% GWP¹ annually

- \$ 8 B+ opportunity across Tier 1,2 carriers globally
- >50% lies in underwriting, pricing & core
- Claim, Risk Mgmt. & Analytics follows the suit

- Financial Services : 23% of Global Zensar Revenue (Q2 FY19)
- Truly global market for us ; Committed for organic and inorganic led digital growth (Cynosure)
- Digital transformation is 3x faster than legacy transformation

Banking & Financial Services

- Global Banking IT Spend growing @ 3.7% YoY
- US. is the largest spender on IT ~ 87% spend

- \$123 B+ Opportunity across Top 10 Banks in UK & SA & Tier 1,2 in US
- IT Services constitute the largest spend

Digital is fundamentally changing the BFSI sector

1 Digital and omnichannel	Frequent, Meaningful & Personalised content for Engagement	80% Customers use digital options for engagement
2 Big data and analytics	Mobility on the go...Leverage Data to penetrate in profitable niches	71% using sensor data for customer engagement
3 Core and legacy system transformation	Embracing outsourcing, automation and SaaS solutions to reduce costs	76% Average reduction in runtime using RPA
4 Cybersecurity	Cybersecurity : Proactive and strategic, not reactive and defensive	86% believe cybersecurity not meeting organisation needs
5 Fin/InsurTech and blockchain	Blockchain led Operational efficacy	8% Average customers using Fin/Insurtech products

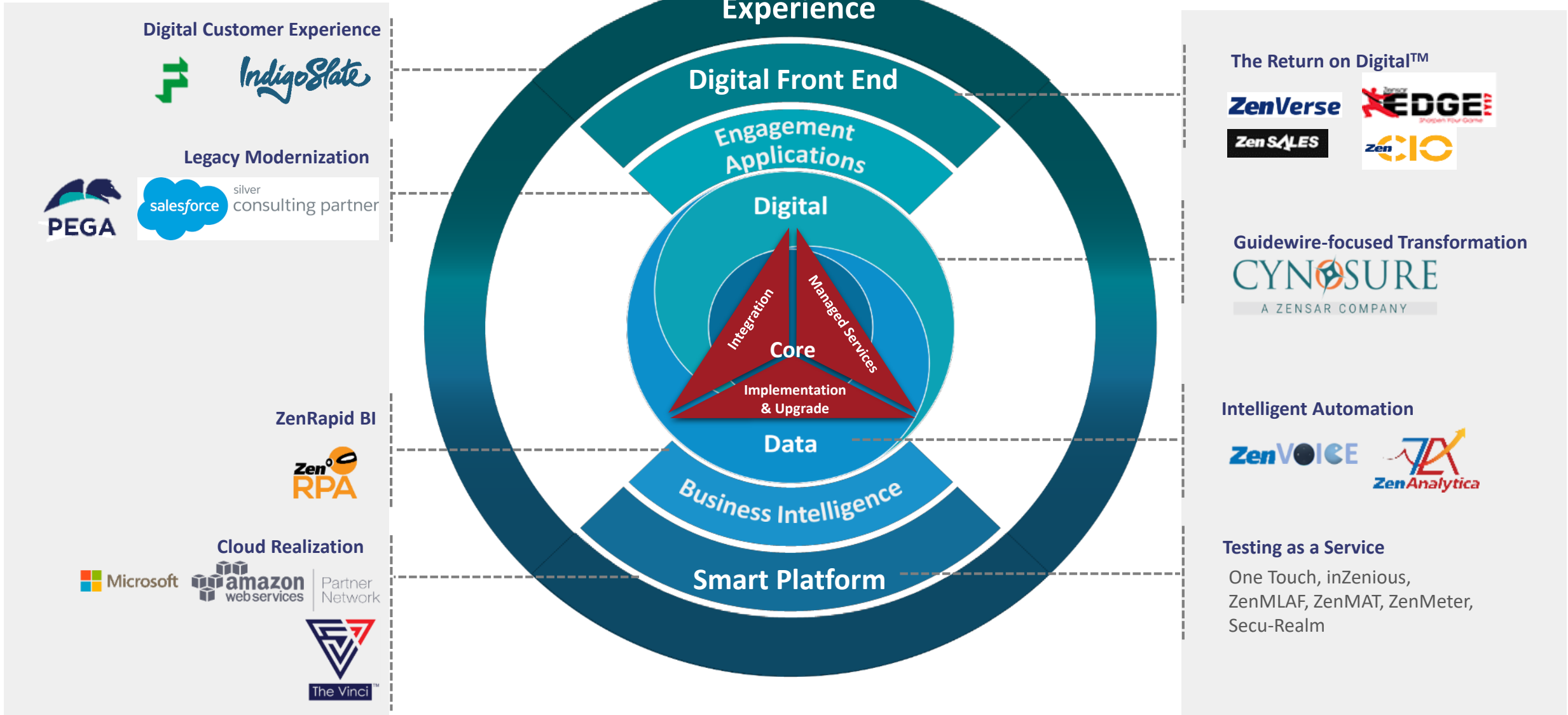


Desired Outcomes

- Improved engagement
- Enhanced operational efficacy and agility
- Strong appetite for innovation

Source: '2018 Sensor Data Survey' – 2018 EYGM Ltd., 'Robotic process automation: Automation's next frontier' – 2017 EYGM Ltd.,

Zensar Advantage: From core to digital



Significant Business Impact created for our customers through digital programs



Blockchain enabled Digital Mortgage for a Leading P&C Insurance Company in the USA

- 20% reduction in data inconsistency
 - 80% reduction in response time
-

New Product Launch for a P&C Insurance Company

- Time to market improved by ~ 25%
-

Customer Acquisition for a leading Bank in SA

- 20% increase in customer acquisition in their Wealth Management portfolio
-

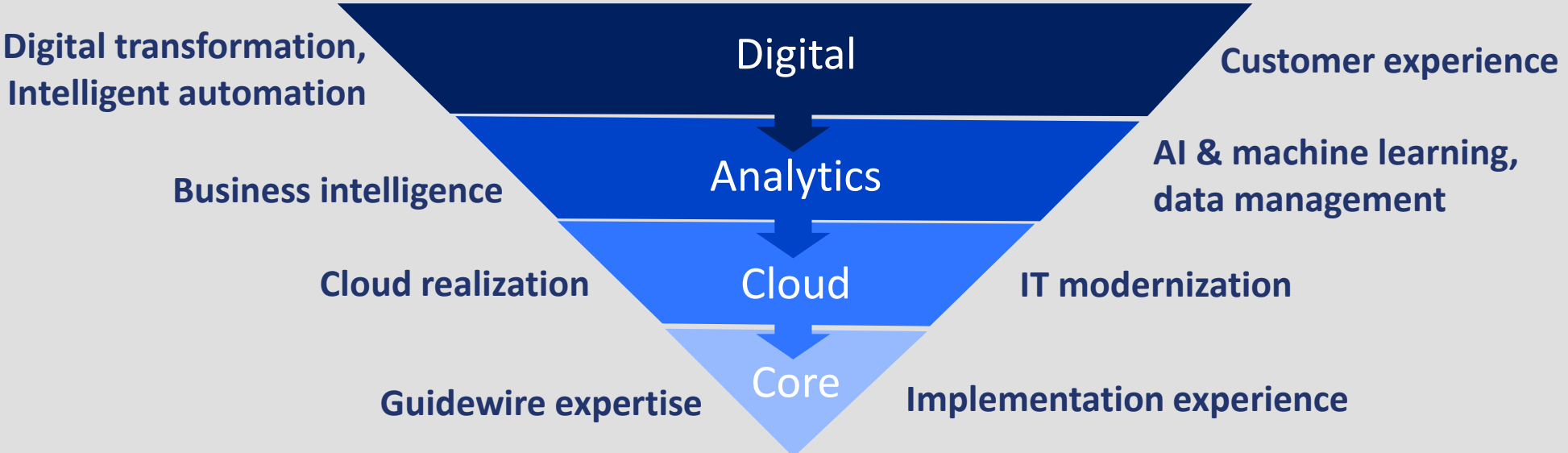
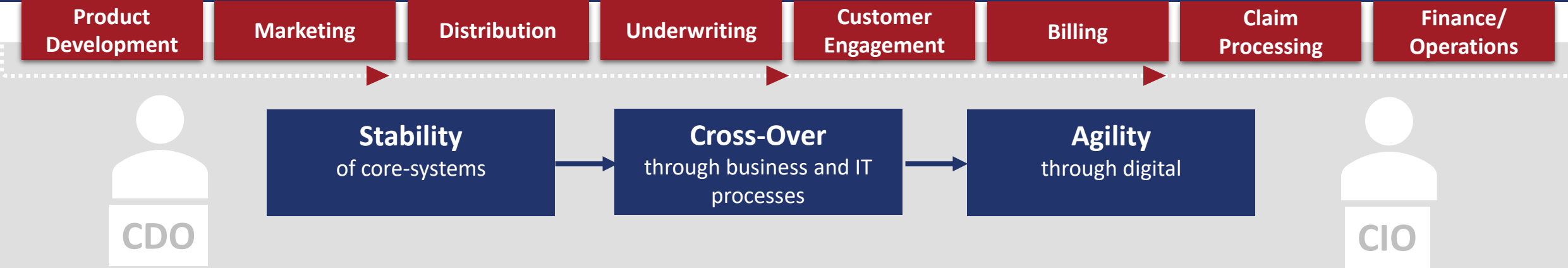
RPA led Automation for a leading Insurance company in the UK

- 40% improvement in response time
 - 100% accuracy in policy uploading
-

Illustration: Zensar Towards a Digital Partner for Insurance



Across the Insurance life-cycle



Analytics



Cloud

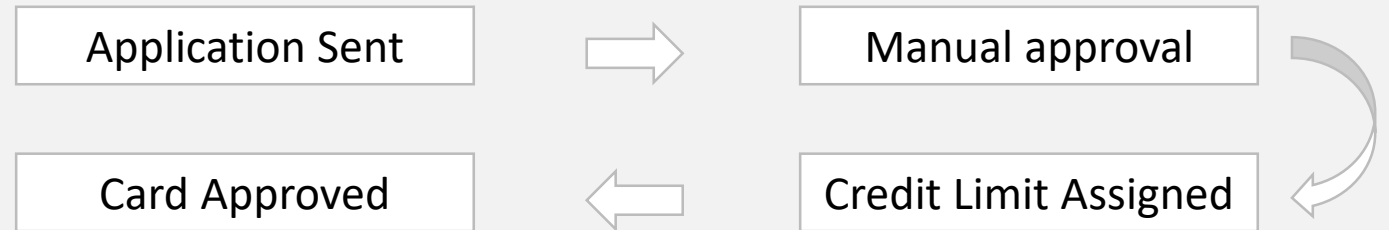


Experience

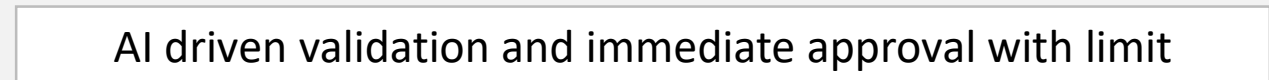


Case Study – Changing phase of the Credit Card Disbursement Cycle

Traditional Process



Modern Process



1. Achieving the full potential in existing logos

- Working in 9 out of Top 10 FS customers in SA;
- 4 out of Top 10 in UK

EN
Expansion
strategy

Digital
capabilities

3. Digital Arrowheads – customer experience, automation & AI

- Leverage existing AI based tools & templates

2. NN acquisition : Tier – I, II

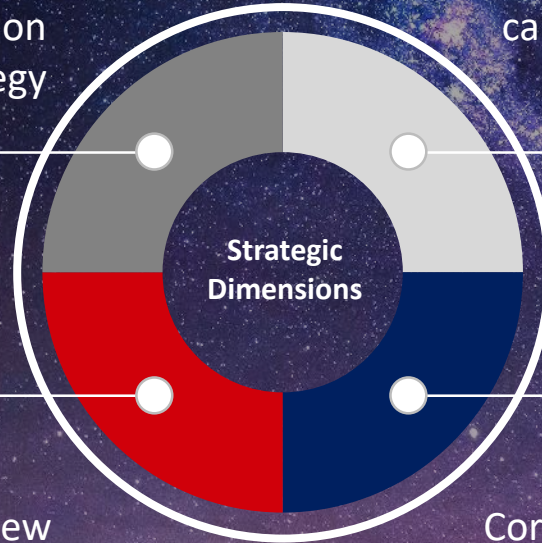
- We believe significant headroom to grow in US market
- Cynosure : Certified training entity for Guidewire

New
customer
acquisition

Core Apps &
modernization

4. Focus on Guidewire ecosystem – Leverage Cynosure for capability enhancement & win new logos

- Strong Pipeline among the Top Tier P&C Insurance Companies



Create & win Large deals

Expanding across value system: Claims, billing, policy as Core, SFDC & Test automation led digital arrowheads

Thank you

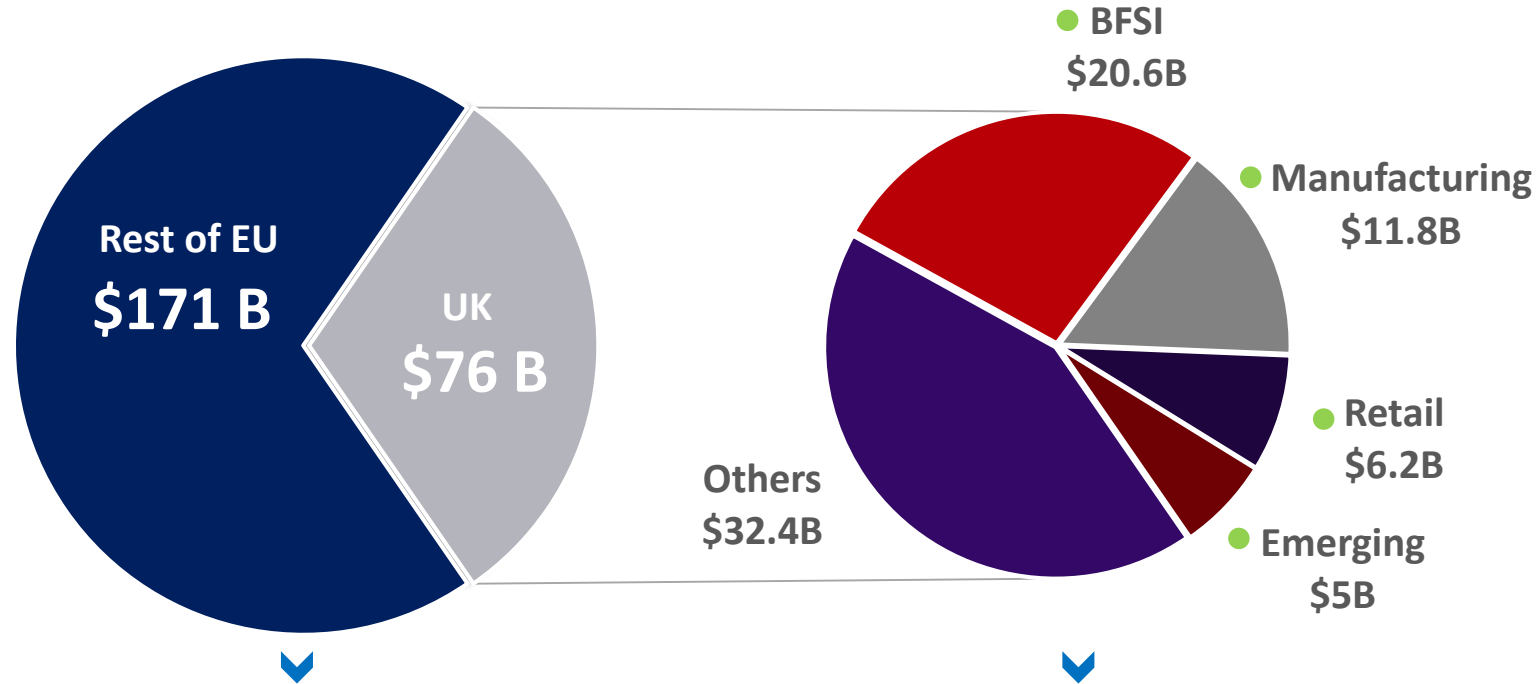
Zensar Investor & Analyst Day 2018

Chaitanya Rajebahadur | Head, Europe

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Operating in a large and growing market with ample potential

With more than 30% of total annual IT spend, UK is the largest IT services market in Europe.



\$247 Billion¹ annual IT spend in EU	3% CAGR FY18-21 expected growth in IT spend	\$76 Billion annual IT spend in the UK
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Focus Verticals presence in all major industry verticals	\$43.6 Billion total size of target market	5% CAGR FY18-21 expected growth in IT spend
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¹Source: Gartner IT Services market share data 2017

Key market trends enabling our growth

- **Brexit** - U. K. businesses to focus heavily on operational performance.
- **Tier 1 fatigue** – Traditional “tier-1” service providers are seeing a sustained decline in satisfaction scores
- **Poor Digital Maturity** - More than half of UK companies are still in design and development phase of their digital initiatives.

CIO Focus



Digital Maturity
Operational Performance
Legacy Modernization
Cost Transformation

CMO Focus



Customer retention
Customer experience
Marketing analytics
Marketing infrastructure

With an end-to-end portfolio of experience design to digital technologies, we offer complete digital transformation services



Foolproof Experience design

Europe's largest specialist in the field of experience design. Among top 10 design agencies in Europe.

- Strategy and Planning
- Design Research
- Design and Development



Cloud and Infra

Smart, next-gen infrastructure solutions with 360 degree real time visibility ensuring zero business disruption

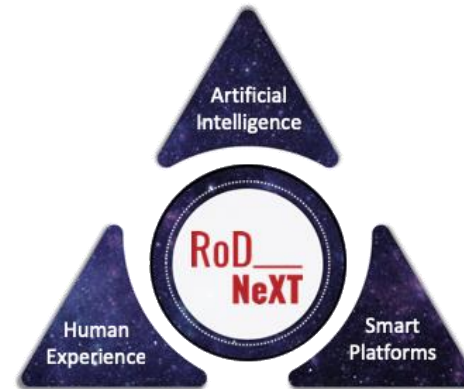
- Digital Workplace
- Cognitive IT infrastructure
- Cyber security
- Intelligent Command Centre (ICC)



Applications

Our legacy business in the UK – helped build long lasting relations with our customers

- Legacy modernization
- Enterprise Applications
- Automation testing
- Maintenance and support



Digital

New and eXponential Technologies

- Unified digital commerce
- Analytics / Big data
- Smart platforms
- ROD Nxt
- AI/ML
- IoT
- Blockchain

We have delivered phenomenal results so far....

We have doubled our business in the last 3 years



year on year growth
(in constant currency terms)



➤ *With constant additions to our client portfolio...*

New clients added in the last 4 quarters



➤ *And a healthy order book...*

Deals signed in last 4 quarters



5.5%

2-Year CQGR in constant currency

And now adding new growth levers

Enablers for Disruptive Transformation



Our Alliance partners



With a commitment towards long relationships



One of the Largest Utilities Player UK

Global IT transformation partners (25 years)



Large High Street Retailer UK

Global experience design and digital transformation partners (12 years)



One of Largest Financial Services Company in UK

Global IT transformation partners (10 years)



One of the Largest Retail Bank

Global experience design partners (10 years)



Global Inter-governmental organisation

Global IT transformation and emerging-tech partners (5 years)



One of the Oldest Private Bank UK

Global experience design and digital transformation partners (8 years)



One of the Largest British Motoring Association

Digital transformation partners (3 years)



One of the largest Oil & Gas Company

Global experience, strategy and implementation partners (2 years)



One of the World's leading FMCG Company

Global experience design partners (1 year)

Recent successes

Cross Sell opportunities from recent clients

Improved Win Ratio

40%

Win ratio for £ 20 M+ deals (TTM)

Healthy deals pipeline

Strong pipeline with Existing and New clients

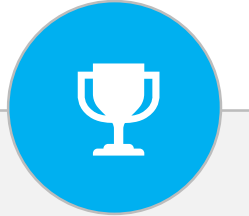
Key Growth Levers



Growth in existing accounts

Strengthen alignment to client requirements

Investments in co-creation



Win new business

Proactively targeting FTSE 500 companies in the UK



Foolproof

Experience design led deals – define, design and deploy

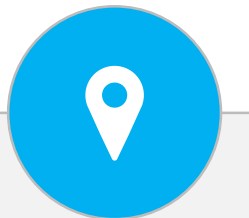
Investments in AI led customer experience



Creative Large Deals

Focus on strengths – financial services, retail

Managed service, outcome based models



EU Presence

Delivery centres in Prague (Czechia) and Krakow (Poland) – Gateway to EU

Near-shore delivery and localisation

Thank you

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Zensar Investor & Analyst Day 2018

Harish Lala | Head, Africa

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Zensar South Africa – Strong Positioning



Among The Market Leaders
in Banking & Insurance IT
services, partner to:

4 of Top 5 Banks
5 of Top 5 Insurance



**10% of Zensar
business**

Highest Investments, exposure &
commitment in Indian IT industry



Market Leader In
Commerce Services in
Retail

Fashion & Lifestyle
Oracle

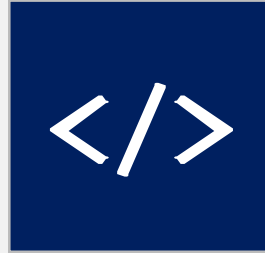


**Tier 1 Player
in SA**

Trusted on Core
Platforms and now
Digital Transformation

Strong on Localisation,
BEE level 3

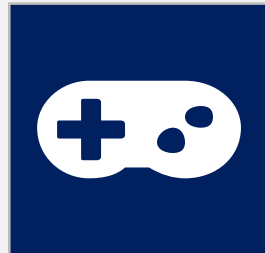
***“Great Clientele
with strong
headroom to grow,
Strategic
Engagements,
exemplary history
of execution”***



Intelligent Automation
Partner to one of the
largest Insurance
company



A Digital Omnichannel
experience partner for
a leading Retail
company



Product Dev & Tech.
partner for a leading
global Gaming
company



Modernising Core
platform for
largest Fleet
management company



Digital Experience
transformation
for one of SA's top
Banks

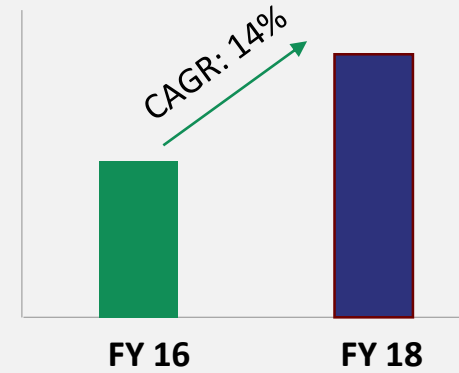


Enabling global
expansion for leading
Health insurance firm

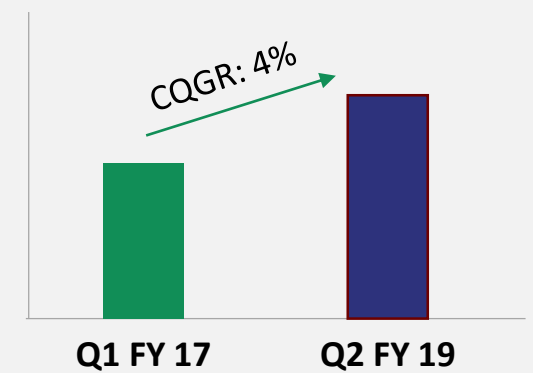
Key Trends:

- Digital Impact:** % share of Digital revenue is increasing impacting gross margins positively
- Managed Services:** Managed services portfolio improving
- Offshore Revenue:** Ratio of Offshore / onsite increasing consistently
- Key Accounts building:** Key client & deeper mining focus increasing revenue growth

Revenue CAGR



Revenue QoQ



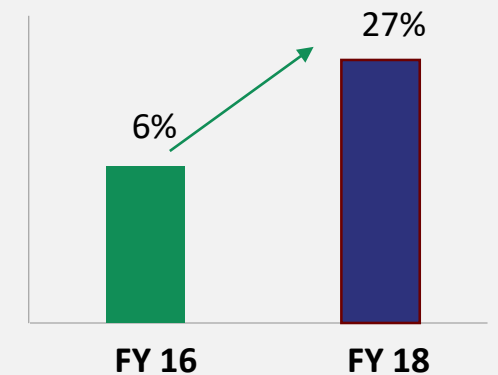
Deepening Relationships:

No. of Clients

ZAR 10m – 50m: 33% ↑

ZAR 50m+: 60% ↑

Digital Revenue Contribution



1 Continued Focus on “Energising Core” offerings:

Lean Run Legacy (Application Services / Testing /

Enterprise Applications)

Automation & Platforms led modernisation

Cloud / Microservices / API re-architecture

2 Expand into Key client portfolio with:

Digital Transformational initiatives

Cloud & Infrastructure Services cross-sell

RoD NeXT led transformation services

Larger Proactive Propositions

3 Strengthen Retail portfolio :

Commerce Speciality focus

Digital Supply Chain

Cloud and Oracle Core

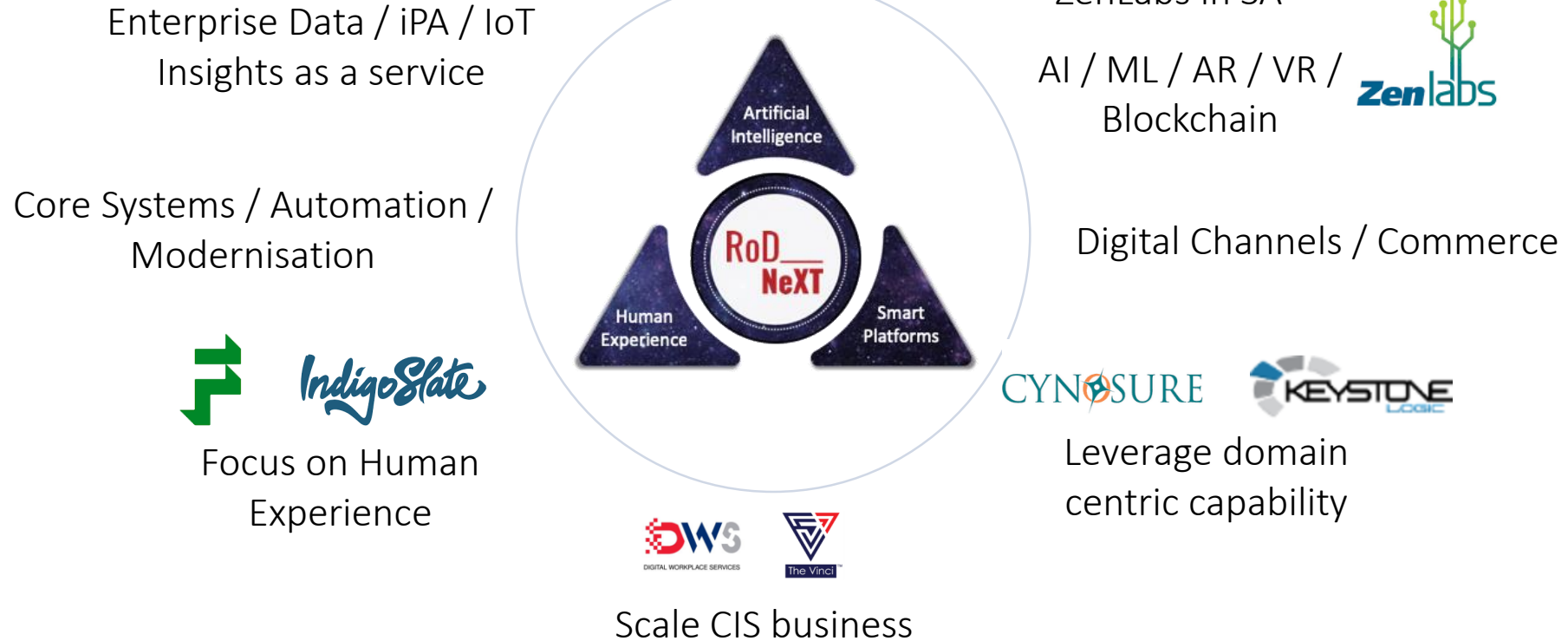


Investing in Digital Experience



Expand Localisation /
BEE alignment

Digital Consulting Team



Alliance led Growth



Thank you