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Digital Foundation

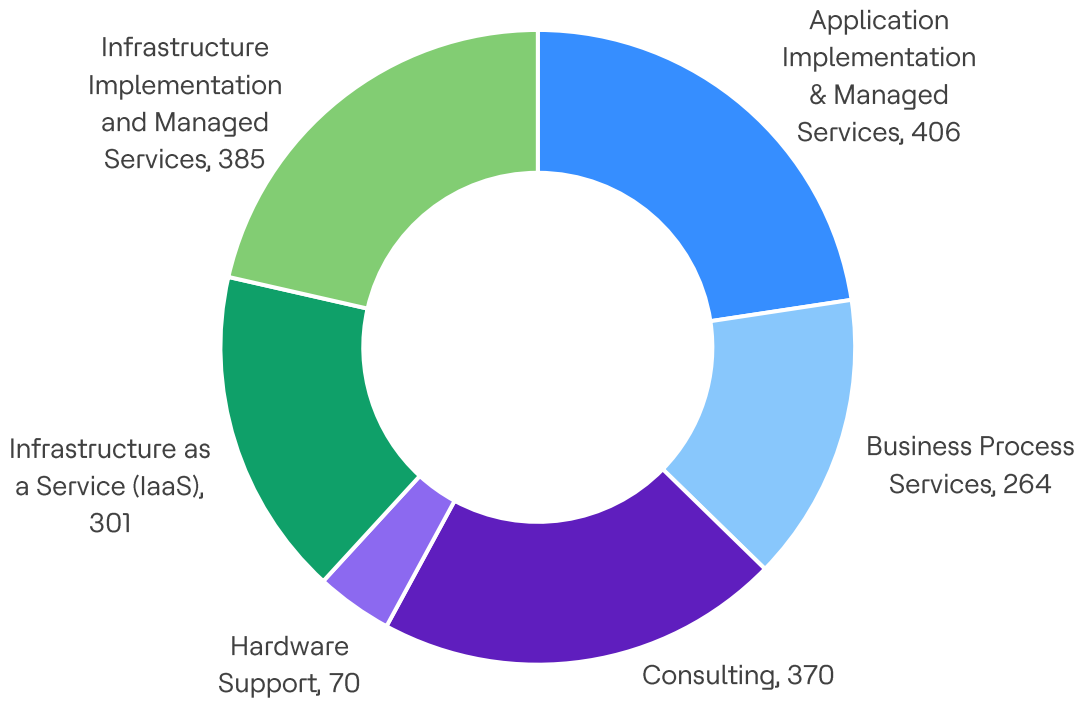
Jagadeshwar Gattu
President, Digital Foundation Services

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Digital Foundation (DF), the Bedrock for Digital Transformation

Highest targeted (Digital Foundation) spend across all IT services



Digital Foundation* expected to be $530B by 2026, growing 6.3% CAGR (23YR-26YR)

Traditional Segments

DC Hosting & Managed Services
$141B, 4.9% CAGR

Infrastructure SI & Implementation
$105.5B, 5.38% CAGR

End User Compute & Mobility
$40.5B, 3.6% CAGR

Traditional Networks and WAN
$34.9B, -2.5% CAGR

Growth Segments

Infrastructure Consulting
$46.4B, 8.1% CAGR

Managed Services for Edge & Cloud
$50.6B, 14% CAGR

SD WAN
$8.2B,14% CAGR

Subscription-based employee life cycle services
$4.2B, 10.5% CAGR

Cyber Security
$99.4B, 9.17% CAGR

Significant headroom to grow across traditional segments, growth segments present the opportunity to rapidly scale in new areas

Source: Derived using Gartner Forecast: IT Services, Worldwide, 2020-2026 and 3Q22 Update and Gartner Information security and Risk Management Forecast WW, 3Q22

Note: (*) Digital Foundation spend includes Infrastructure Implementation and Managed Service, Infrastructure Technology, Security Consulting, and overall Security services market

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Demonstrating thought leadership and execution at scale

Trusted advisor and partner **for managing and transforming large & complex environments**

40% of G100 **are DF Clients**

Market leadership in UX-**based service delivery to end users**

9M+ users
10M+ devices
1.5M+ Instances
350k+ instances in public cloud

Forefront of evolving talent needs

40% **workforce certified** in next-gen technologies

AI, ML & Hyper automation-**led service delivery at scale**

10k+ automation **artifacts**

Value Centricity **as a culture**

$2B in value **generated**

Legacy to Digital Transformation

One of top 5 oil producers

Large Scale M&A Integration

F500 American manufacturing conglomerate

Transforming User Experiences

F50 multi-national consumer goods corporation

Automation-at-Scale

Leading semiconductor design and manufacturer

The only service provider to be recognized as a "Leader" in all Gartner® Magic Quadrant™ reports

Gartner

2022 Gartner® Magic Quadrant™ leader for **Public Cloud IT Transformation Services**

2022 Gartner® Magic Quadrant™ for Outsourced **Digital Workplace Services**

2022 Gartner® Magic Quadrant™ for **Managed Network Services**

2022 Gartner® MQ for **Data Center Outsourcing and Hybrid Infrastructure** Managed Services

A Leader in the IDC MarketScape: Worldwide **Managed Multicloud Services** 2021 Vendor Assessment — IDC

Leader in the Everest Group's **IT Security Services – North America** PEAK Matrix® Assessment 2022 — Everest Group®

Leader in the Everest Group's **Digital Workplace Services – North America & Europe** PEAK Matrix® Assessment 2022 — Everest Group®

Cisco Partner **Bold Bets Award** 2021 — Cisco Partner

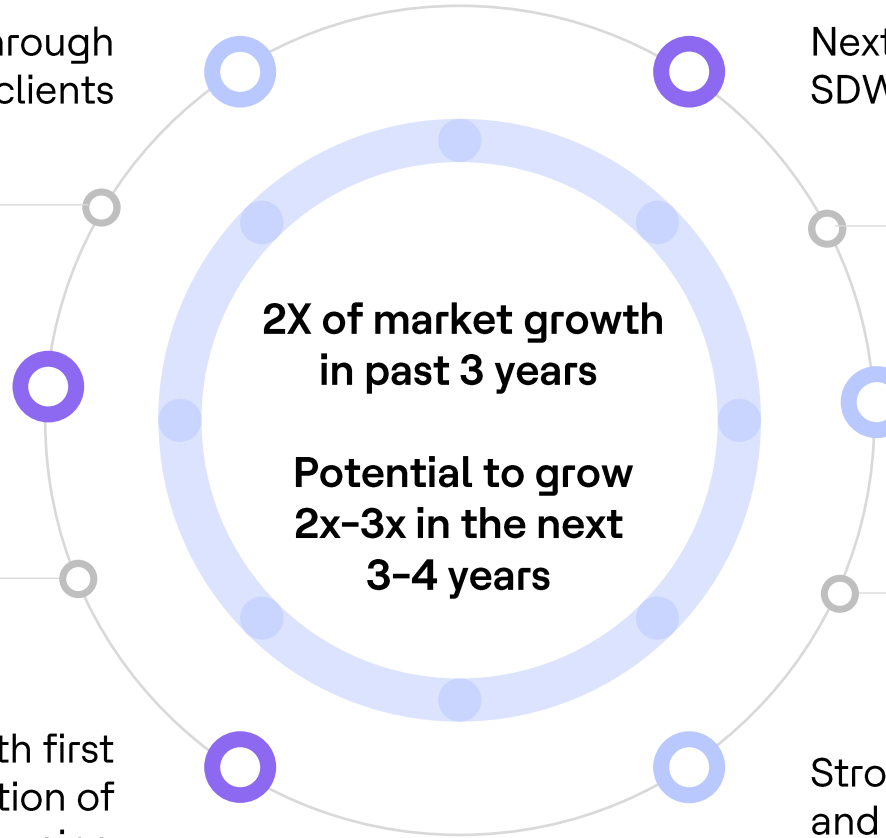
VMware Global 2022 **Partner Value Award** — vmware

Google Cloud Breakthrough Partner of the Year Award 2021 — Google Cloud

Microsoft Partner of the Year 2022, LHS Services & UK — Microsoft Partner

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Growth vectors and aspirations



Potential growth through expansion in existing clients

40%-50% potential growth in focused countries and New Frontiers

$70B-$80B potential market with first time outsourcers and consolidation of fragmented outsourcing

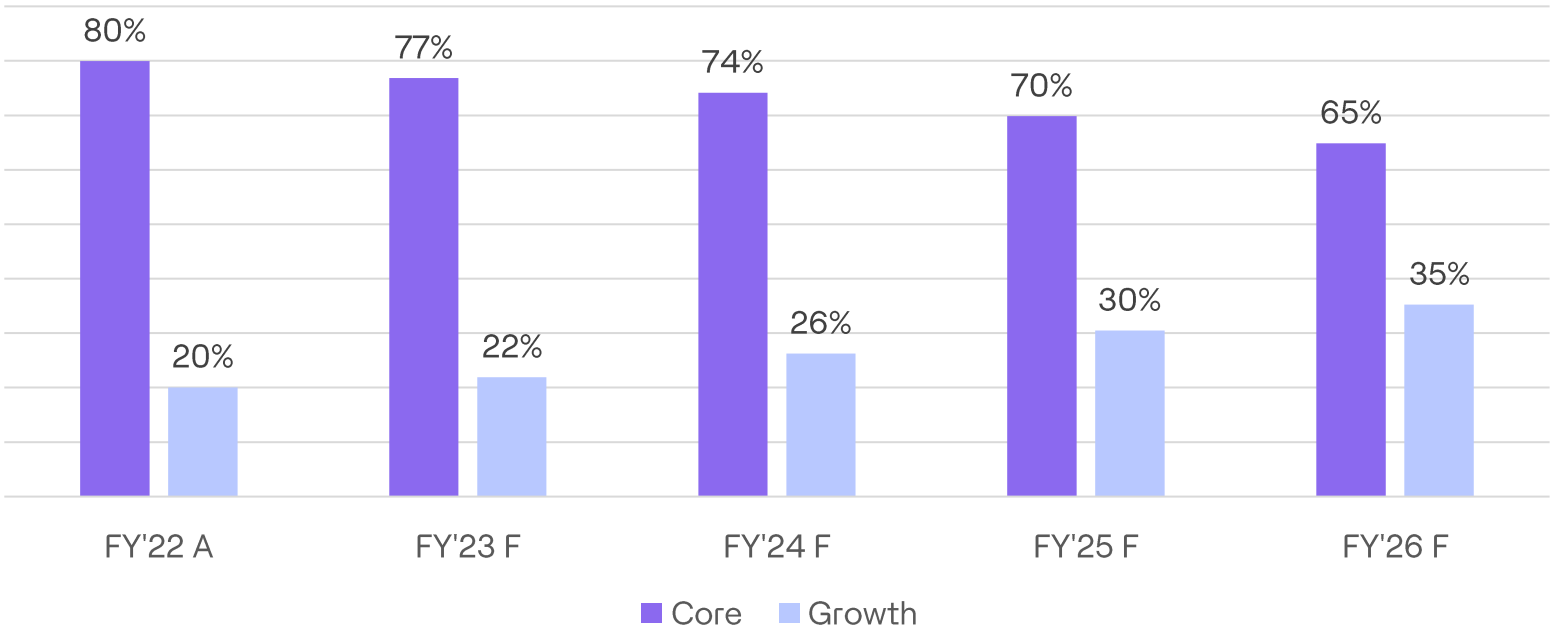
NextGen operating models in Hybrid Cloud, SDWAN, Experience and Dynamic Security

$100B addressable renewal opportunities over next 3 years

Strong partnerships with Hyperscalers and technology providers

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Evolving business mix, healthy CAGR across services



Growth services exceed market CAGR by 2x-3x, led by Multi-Cloud, Experience and Security services

Growth Services

Cloud Services
2X Market CAGR

Employee Experience Services
2X-3X Market CAGR

Cyber Security Services
2X-3X Market CAGR

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Solutions to address evolving operating models

Hybrid Cloud	EdgeIITy	VelocITy	Cloud Application Reliability Engineering (CARE)	Infonomics
Digital Workplace	eSENSE	FlexSpace	Digital Dexterity	Virtuality
Cyber Security	MiDaaS	360 Secure OT	Cloud security & SASE	Application & Data Security
Next Gen Network	Sensus	Private 5G and WiFi 6	Network-as-a-Service	TiS

In summary

Digital Foundation is the largest IT spend segment

HCLTech is rated the best by Industry Analysts

Aspire to grow 2X – 3X of the market growth

Trusted partner in our clients' Cloud transformation journeys

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