HEXAWARE INVESTOR & ANALYST MEET 2019

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enterprise Solutions

DISRUPT - INNOVATE - TRANSFORM

The Context – Then & Now…

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ES Then…

- ES was a de-growing horizontal year on year
- Peoplesoft was a major portion of portfolio and shrinking as a product line
- Weak partnerships across product lines
- Low brand recall in non-Peoplesoft areas

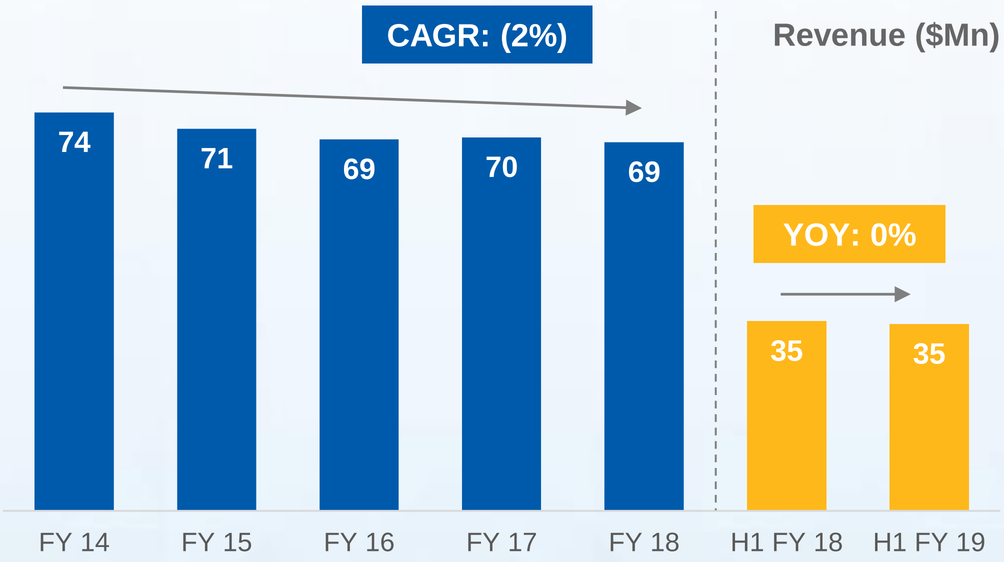
When we briefly met…

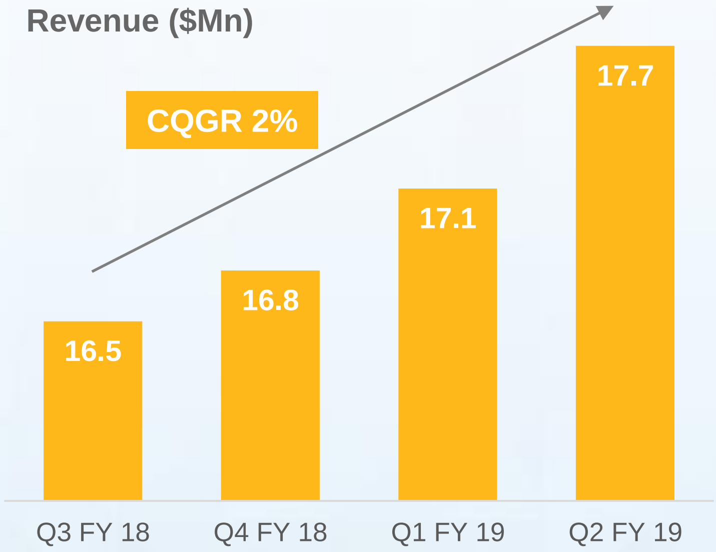
- Committed to create 3 product offerings & align with market demand
- Grow non-PS business
- Infuse new talent & leadership, create nimble organization
- Create brand recall in analyst community
- Re-energize partnerships

ES Now…

- 3 quarters of continuous growth
- ES a truly diverse horizontal with strong momentum and order book across product lines such as BPM, SAP & Workday as well
- Peoplesoft degrowth arrested to being flat with some new market plays
- Strong induction of lateral and senior talent across the spectrum of services – BPM, WD, SAP leaders; and other senior industry talent
- Significant recognition across multiple analysts and product lines
- New partnerships, re-aligned existing ones

Performance Snapshot





So, what did we do ….

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The Headlines - What did we do?

ES – 2.0

Transform while Perform :

Playing Offense,

Playing Defense

- New sources of business growth through investments in Digital Process Automation (BPM) – HAPPI Labs (inaugurated by Pega), SAP Cloud, Workday
- Partnerships and Partner based GTMs – Pega, Appian, WD, SAP
- Protecting the Turf in traditional services (example: PS) - NN Strategy, New Services
- Strategic investments and innovation – HAPPI labs (*vHAPPI*), Industry best leadership
- Widening the market reach - EU & APAC geography
- ABM playbooks - show & tell customized sessions – creating opps in addition to responding
- Created mindshare with analysts and partners
- Diversification of vertical revenue – Banking and Financial Services as a focus area
- Continued the track record of world class execution
- Continuing relations with customers in tech landscape transformation journey

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The Milestones - What did we do ?

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ES – 2.0 - Transform while Perform : Playing offense, Playing Defense

Creating Mindshare Analyst Mentions

- **Forrester -** *WD* - Contender (2019), *Oracle & SAP* - NowTech (2018)
- **Gartner -** *S.M.A.RT. ERP* (by Prasan-2017), *WD* - Market Guide (2019)
- **HfS -** *WD* - Strong Performer (2017), *SAP* - Top 15 vendors in SF (2019)
- **ISG -** *SAP* - Rising Star for HANA cloud Platform, Contender for S/4 HANA (2018)
- **Nelson Hall -** *WD* - Leader in Workday Services (2018), Major Player in *SAP Success Factors & HCM Cloud* (2017)

Collaborate & Win *Marketshare* - Partnerships

- Created Pega Partnership and upgraded to silver partnership in a record timeframe
- Awarded Rookie of the year by Pega
- Workday Subcontract Agreement
- Workday Financials
- Pega Accelerate Program
- Appian Delivery Partner

Continued CSAT World-class Delivery

- Absolutely flawless delivery across all product lines and all customer segments

Disrupting Statusquo Innovation

- HAPPI Lab (8 hr challenge)
- SMART COCO
- Ecosystems, Platforms & Frameworks
- Shared Services model like in Workday
- Cross train, leverage and upskill talent (ex: PS to WD)

** Note on WD Analyst mentions*

The Outlook – Optimistic

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- Focus ABM lead, partner aligned large wins
- New customer acquisition leveraging mindshare and strong market position
- Sustain the momentum of positive growth – push top 3 momentum product lines
- Expand current portfolio - New SaaS Offerings, Diversify in existing Product lines
- Co-create innovative solutions for customers in momentum areas
- Continue to bring in new and differentiated Talent, strong upskill of talent from traditional areas

Capitalize on Mindshare, Market Positioning

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Innovative Services

Passionate Employees

Delighted Customers

Thank you

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