

May 27, 2020

**National Stock Exchange of India Limited**

Exchange Plaza, 5<sup>th</sup> Floor,  
Plot No. C-1, G Block,  
Bandra Kurla Complex, Bandra (East)  
Mumbai - 400 051.

**BSE Limited**

Phirozee Jeejeebhoy Towers,  
Dalal Street,  
Mumbai - 400 001.

**Sub: Intimation of Virtual Midcap Conference 2020 by Equirus Securities**

**Ref.: Scrip ID - STRTECH/ Scrip Code – 532374**

Dear Sir/Madam,

We wish to inform that the Company will be participating in Virtual Midcap Conference 2020 organised by Equirus Securities. The details are as follows:-

Date of Conference	Name	Venue	Type
28/05/2020	Virtual Midcap Conference 2020	Virtual	One on One / Group

A copy of the Company's Presentation in this behalf, is enclosed herewith.

Kindly take the above on record.

Thanking you,

Yours faithfully,

For **Sterlite Technologies Limited**

**Amit Deshpande**

Company Secretary & Corporate General Counsel



stl.tech

# Investor Presentation May'20



# Safe Harbour



Certain words and statements in this communication concerning Sterlite Technologies Limited (“the Company”) and its prospects, and other statements relating to the Company’s expected financial position, business strategy, the future development of the Company’s operations and the general economy in India & global markets, are forward looking statements.

Such statements involve known and unknown risks, uncertainties and other factors, which may cause actual results, performance or achievements of the Company, or industry results, to differ materially from those expressed or implied by such forward-looking statements.

Such forward-looking statements are based on numerous assumptions regarding the Company’s present and future business strategies and the environment in which the Company will operate in the future.

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# Company Overview



**Company  
Overview**

**1**  
The Digital  
Networks  
Growth Story

**2**  
STL  
Strategy

**3**  
Our Unique  
Value Proposition

**4**  
STL  
Financials

Annexure

# We build digital networks for our customers



Core Business

Customer Segments



Telcos



Cloud Co.



Large Enterprises



Citizen Networks

End-to-End Solutions

opticonn

Optical Connectivity



Fibre Deployment

FTTx mantra  
One Solution. Countless Opportunities

FTTx Access Network

netmode

Network Modernization

Portfolio Offerings



Optical Interconnect Products



Virtualised Access Products



Network Software Products



System Integration Services

Unique Capabilities

Glass Preform

Fibre & Cables

Virtual Network Software

Telecom Software

Network Design

Optical Interconnect

Radio Access

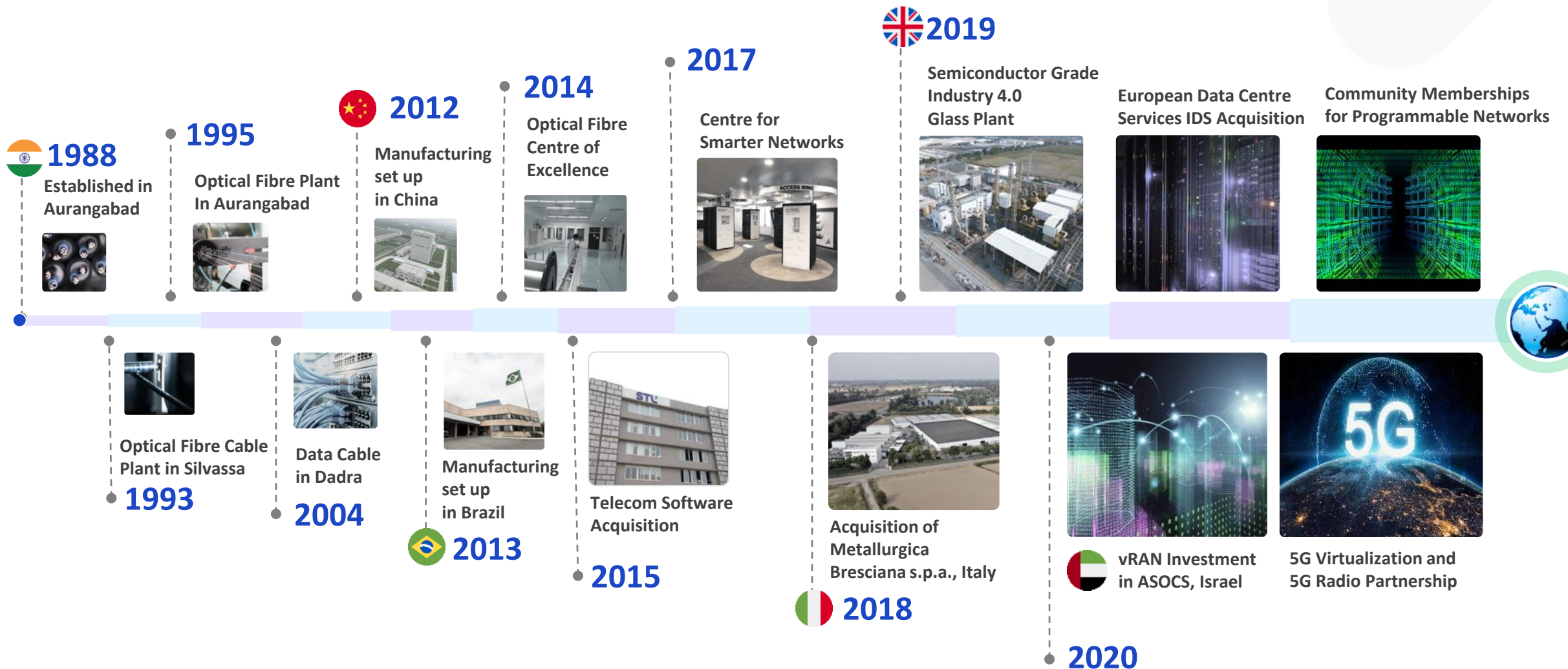
pFTTx

Fibre Deployment

O&M

# Starting from optical fibres

## We now build digital networks globally



# Our Company in numbers



**\$736 Mn.**

## FY20 REVENUE

India (66%), Europe (22%),  
China (3%), Rest of world (9%)

**7**

## GLOBAL PRODUCTION FACILITIES

50m fkm optical fibre capacity

**4**

## INNOVATION CENTRES

Research & Development

**358**

## PATENTS

Across the network layer

**Zero**

## WASTE TO LANDFILL

Shendra, Rakholi, Dadra

**30+**

## NATIONALITIES

~3,100 Employees

GLOBAL FOOTPRINT



# STL has a comprehensive Portfolio of offerings



## Optical Interconnect Products

- Glass Preform
- Optical Fibre
- Optical and Speciality Cables
- Optical Interconnect



## Virtualised Access Products

- Programmable FTTx
- Virtualised Radio Access Network
- RAN Intelligent Controller
- RAN Orchestration



## Network Software Products

- Telecom Billing Operations Software
- Monetization and Engagement Software

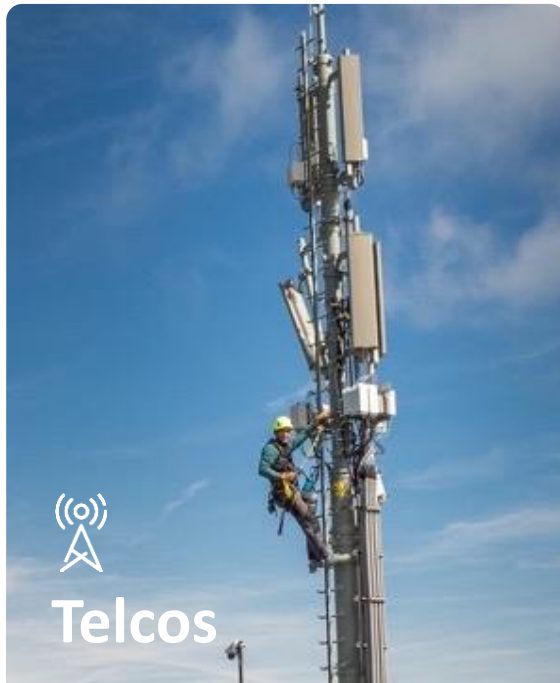


## System Integration Services

- Network Design Services
- Fibre Rollout Services
- Network Operations & Mgmt. Services
- Data Centre Network
- Private Enterprise Network



# Our Customer and Case Studies



## Telcos

to connect

each customer with the latest data applications while ensuring better experience



## Cloud Co.

to enable

future applications and immersive content by bringing compute and storage capabilities to the edge



## Citizen Networks

to empower

every citizen with high-quality primary connectivity



## Large Enterprises

to create

secure networks for the specialized enterprise use cases

# Fast and Future Ready Implementations - Case Studies



**30% faster fibre to the home provisioning**



Using **Yogalite™ Cable** with Micro-Module for a leading French Carrier

**2x faster rollout for world's 1<sup>st</sup> Exabyte network**



Using **LEAD360™** and **FTTx Mantra™** for leading South Asian Telco

**40% cost efficient SDN ready network**



Using **FTTx Mantra™**, **iCORE™** to provide high-speed broadband in 4.5 mn homes in Telangana

**3x deployment speed for digital inclusion**



Using **LEAD 360™** approach to connect 7.5 mn people and 4,045 villages in Maharashtra

**50% reduction in cabling requirements**



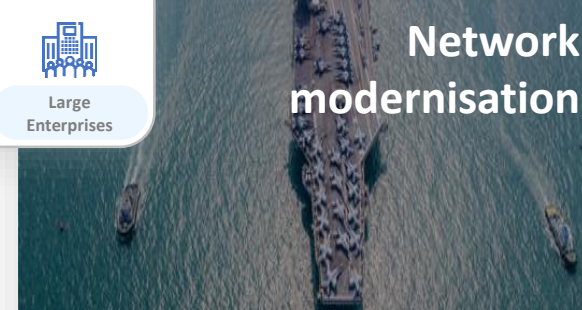
Using **POWER-Tx™** Solution for a **Global Cloud Co.** to serve high Speed data with power

**35% reduction in installation cost**



Using **TruRibbon™** to serve high capacity data transfer with extremely low latency

**Network modernisation**



**\$500 mn** multiyear project across **1600 sites** to design, execute, O&M the Indian Naval Network

**7x deployment speed in 10k+ Kms OFC network**



**\$350 mn** project for creating the **world's largest intrusion-proof network** in J&K for Indian Army



Telco



Citizen Networks



Cloud Co.



Large Enterprises

# The Digital Networks Growth Story



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**1**  
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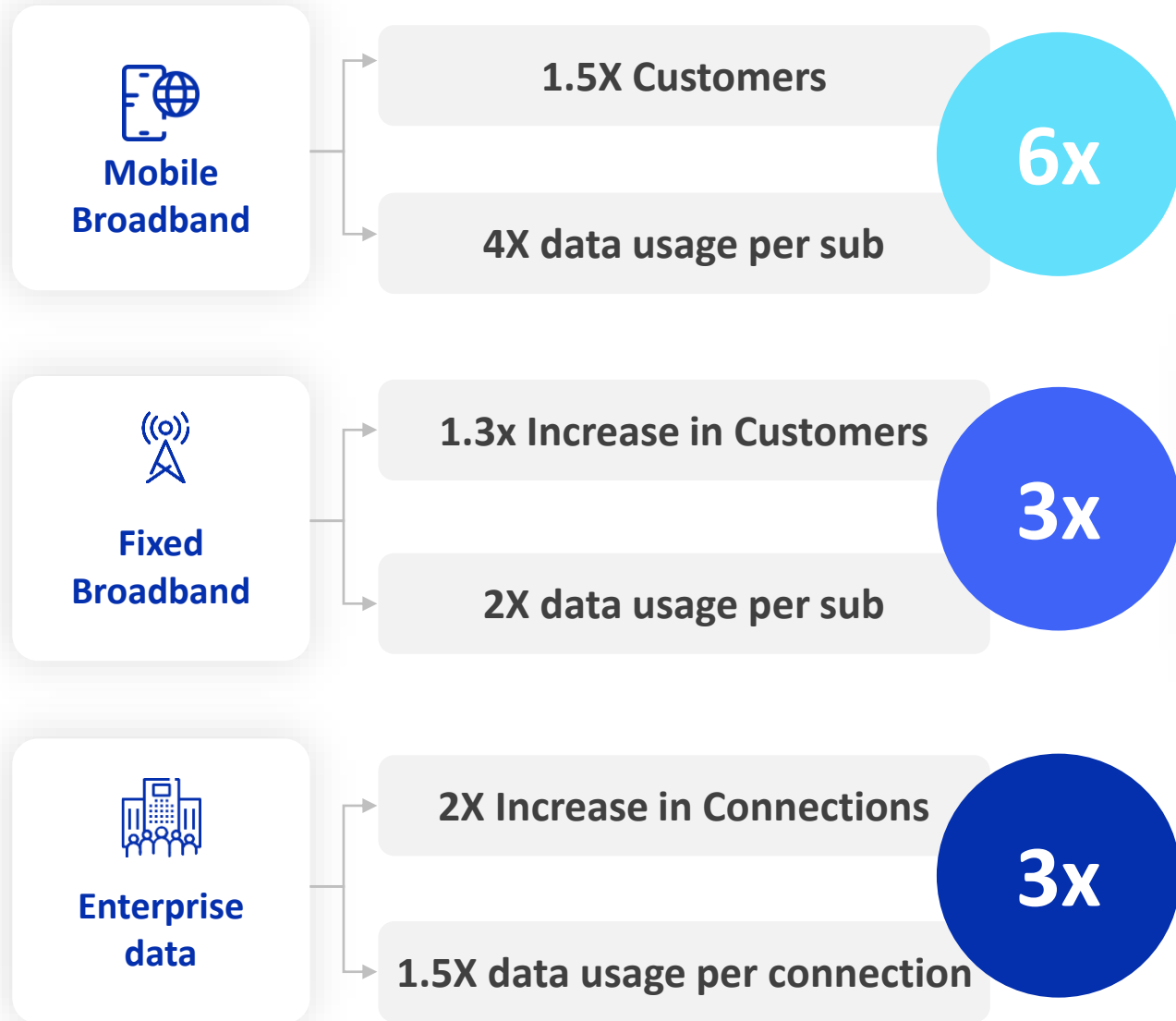
**2**  
STL  
Strategy

**3**  
Our Unique Value  
Proposition

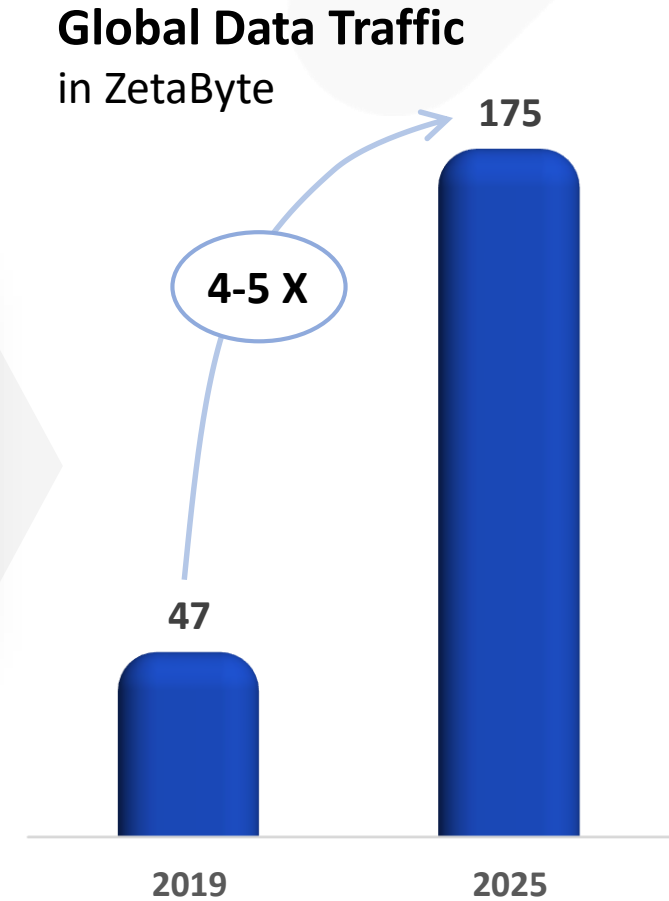
**4**  
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# Data growth is continuing and accelerating



Data Traffic growth: **4x to 5X**

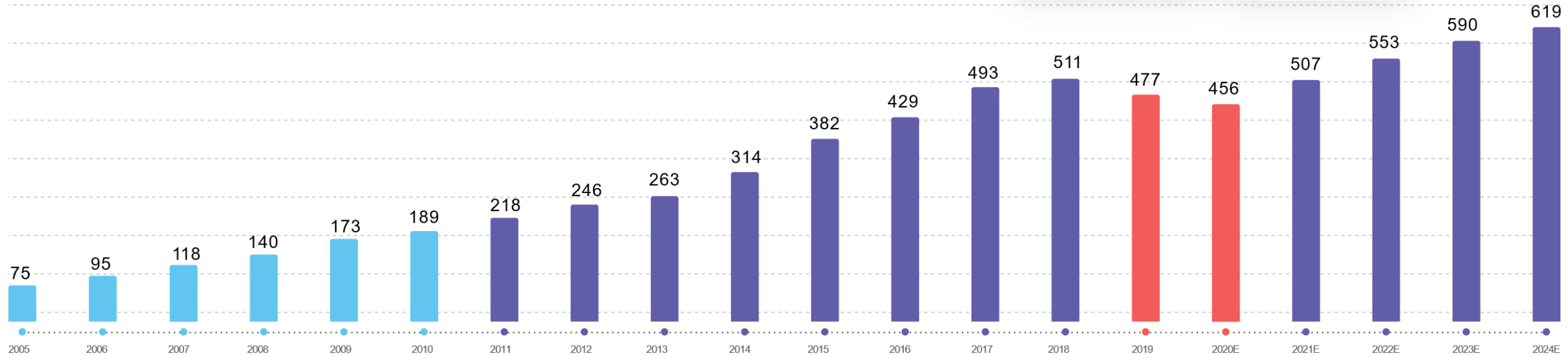


# In the short term due to COVID19 There may be delay in demand recovery



**H1 FY21** ↓  
Degrowth

**H2 FY21** ↑  
Growth



Units: Mn. fkm

- The fibre demand is currently in temporary pause at the end of 4G and at the start of 5G network deployment.
- After the pause in 2019 & 2020, the fibre demand will start to grow from 2021, much faster than currently anticipated.
- The 5G deployment cycle is expected to be a 8 to 10 year cycle.

# But in the medium term This will be the inflection point for data networks industry

Surge in traffic  
by 30% to 100%  
& decrease in  
internet speed

Surge in cloud  
demand from  
enterprise segment

Enterprise  
applications  
demanding low  
latency shall push  
edge datacenters

Work from Home  
leading to higher  
traffic from  
residential localities  
which shall push  
FTTH penetration

Data traffic is  
becoming more  
symmetric



*We believe Covid-19 pandemic has accelerated the society transition to broadband & digitization by at least a decade*

**- MKM Partners**

# Leading to investment by network creators



## Telcos

CAPEX- \$200~\$250 bn.

Telcos to invest heavily in 5G & FTTH

- Increasing proportion of current CAPEX for optical Infrastructure
- **5G deployment** to continue for 8 to 10 years leading to denser networks
- **FTTH roll outs** continue across the globe



## Cloud Co.

CAPEX- \$100~\$120 bn

Cloud companies invest in developing edge networks and massive data centres

- Cloud companies also starting to **own transmission network** b/w datacenters



## Large Enterprises

GLOBAL CAPEX- \$300 bn

INDIA CAPEX - \$1 ~\$2 bn.

Large enterprises invest in developing specialized enterprise use cases

- Defence in **Network Modernisation**
- Large enterprises PowerGrid, Railways continue to invest in **smarter networks**



## Citizen Networks

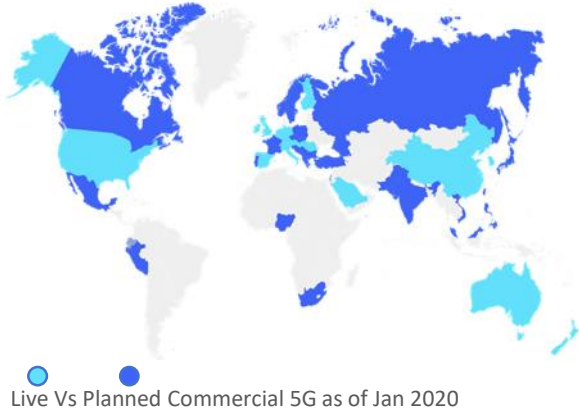
INDIA CAPEX - \$1 ~\$2 bn.

Citizen networks invest in developing digital infrastructure for all

- National Broadband Mission to invest \$100bn for providing **broadband access to villages** by 2022
- **BharatNet Initiative** to deploy 3 mn. route km OFC, Fiberisation of towers from 30% to 70%.

# Telcos to invest heavily 5G and FTTH

## 5G



- Chinese Telcos put together plan to spend **\$25 bn. on 5G**
- AT&T sets aside **\$4bn for network investments**
- Verizon boosts capex by **\$400mn**

- **By 2025, 20% of connections will be 5G**
  - 46 operators in 24 markets have commercial availability now
  - 76 operators in 39 markets have announced plans to roll out
- **48.3 million 5G subscriber base in China in March 2020\***
- **Operators will invest \$1.1 trillion in their networks globally in the next five years and almost 80% (~\$800bn) will be in 5G.**

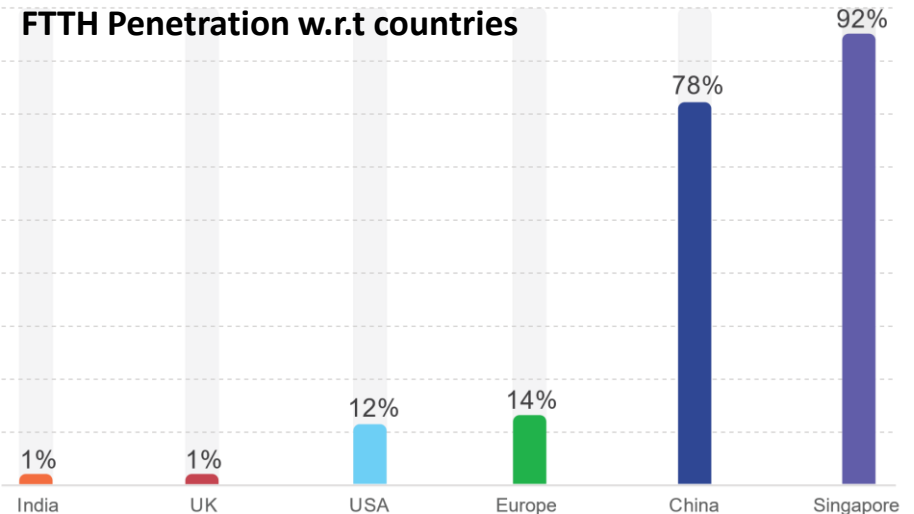
## FTTH

- Most of the world (incl. US, UK) have a lot of potential to increase FTTH Penetration. Only few countries (e.g. China, Singapore) have nearly full FTTH reach and reaping its benefits
- Developing economies like India with very low FTTH penetration, have huge potential for growth, driving fiber demand.



*Working from home is a necessity (to be compared to water or electricity). Government will mandate 5G and super fast fibre universal roll out*

**- Credit Suisse**



Source: IDATE for FTTH Council Europe, 2019; Company estimates

\* reported by 2 of large Chinese carriers, China mobile & China telecom



# Cloud companies, large enterprises and citizen networks shall also accelerate their investments



## Cloud Co.



*As COVID-19 impacts every aspect of our work and life, we have seen two years' worth of digital transformation in two months.*

**- Microsoft**



## Large Enterprises



*Many companies are looking at long-term investments in their networks, and in some cases, pulling forward investment in 5G because of its increased reliability and speeds*

**- Deloitte**



## Citizen Networks

*The UK govt. announced the \$6.5 bn. investment in creating gigabit capable broadband in March 2020.*



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# Our Customer investments are creating a New Generation of Digital Networks



## 4G Data Network

Less end points & wireless last mile connectivity

Telco Use cases only

Hardware packed together with closed-source software

## 5G Data Network

### SIGNIFICANT NETWORK CREATION BY TELCOS

Data Growth (5G, Edge Network creation, FTTH Rollouts and Rural Connectivity) will drive dense and deep fibre networks with multiple end points and low latency

### LARGE-SCALE NETWORK CREATION BY NON-TELCOS

Hyperscale and Edge data centre build by Cloud companies  
Government and Private Enterprises – *campus connectivity, 4G/5G Intelligent mobility, data centres, IoT, Industry 4.0, Smart grid, E-health, etc.*  
Fibre infra companies and DC colocation companies

### OPEN DISAGGREGATED VIRTUALIZED NETWORKS

Open and Software defined networks need  
Next generation innovation that will enable the entry of new players

# We help our customers capture this opportunity By Providing End-to-End Solutions



## Trends

SIGNIFICANT NETWORK  
CREATION BY TELCOS

LARGE-SCALE NETWORK  
CREATION BY CLOUD,  
ENTERPRISES & CITIZEN  
NETWORKS

OPEN DISAGGREGATED  
VIRTUALIZED NETWORKS

## 4 Customer Segments



Telcos



Cloud  
Co.



Large  
Enterprises



Citizen  
Networks

## 4 End-to-end Solutions

opticonn

Optical  
Connectivity

- Product suite design
  - Fibre and cables
  - interconnect
  - logistics
- for all network topologies*



Fibre  
Deployment

- Large scale design
  - Fibre rollout
  - Activation
  - Management
- for core networks*

FTTx  
mantra

One Solution. Countless Opportunities

FTTx Access  
Network

- Design for scale, latency, agility
  - Rollout, activation
  - programmable open orchestration
- for fibre access network*

netmode

Network  
Modernization

- Comprehensive network redesign
  - Future readiness
  - Transport, compute, security
- for enterprise networks*

## 4 Portfolio Offerings



Optical  
Interconnect  
Products



Virtualised  
Access  
Products



Network  
Software  
Products



System  
Integration  
Services

# These end-to-end solutions have been delivering results



## Faster Fibre provisioning for a leading French Carrier

**30%**  
Time saving faster installation  
**5x**  
More storage space utilisation  
**1.5 dB**  
Improved signal strength

**opticonn**  
Optical  
Connectivity

## Transformative digital inclusion connecting 4,045 village in Maharashtra

**LEAD  
360°**  
Fibre  
Deployment

**2x**  
Deployment speed  
**Future ready**  
IP MPLS architecture  
Robotics, big data & analytics

## Full-stack solution for world's first Exabyte network

**2x**  
Faster speed of activation  
**FTR**  
Better network life and TCO

**FTTx  
mantra**  
One Solution. Countless Opportunities

**FTTx Access  
Network**

## \$500 mn. multiyear project for Indian Naval Digital Network

**netmode**  
Network  
Modernization

**12**  
Data centres  
**1600**  
Sites with 44 network locations  
**30,000**  
Network elements

# STL's strategy is focused to win in this future



**Key Accounts  
Management**



**Technology-led E2E  
Solutions**



**Ecosystem Partnerships  
and Investments**

**Increase funnel  
&  
win-ratio in top 20 accounts**

**Increase win-ability  
&  
total addressable market**

**Enhance capabilities with M&A  
&  
organic investments**

1

## Industry leading growth

- Key account management, Technology led end to end solutions & ecosystem partnerships
- Growth vectors – (Penetration in Telco & Cloud segment, Expansion in Europe, ME & US )

2

## Absolute EBITDA growth & RoCE expansion

- Led by revenue growth & cost reduction
- Increase in global optical fibre prices shall directly flow to EBITDA

3

## Riding the disruption wave

- Developing new technologies to ride the incoming disruption in virtualisation.
- Target enterprise segment in 5G network applications

4

## Completion of Investment Cycle

Free Cash flow shall be available post investment cycle completion in FY22 to reduce debt & distribution to shareholders

# Our Unique Value Proposition



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# Why STL ? – Our unique proposition



## Experience, expertise and disrupting for digital networks



**25 years of experience in  
Optical Connectivity**

Glass Preform | Optical Fibre | Cables | Rollout



**Expertise in integration of  
large-scale digital networks**

Large complex projects | completing integration



**Disrupting with virtual edge  
technologies**

Strategic investments | Collaborations | R&D

## Driven by technology & purpose



**Investing in technology  
development and adoption**

4 Innovation Labs. | 358 Patents. | Startup-style



**Transforming everyday lives across  
communities**

Environment | Social | Governance

# 25 years of experience in optical connectivity



## Optical Fibre

## Optical Fibre Cable

## Speciality Cable



Waluj  
Aurangabad  
India



Shendra  
Aurangabad  
India



Jiangsu Sterlite  
Tongguang Fibre Co.  
Limited  
Haimen-City  
China



Rakholi  
Silvassa  
India



Metallurgica  
Bresciana  
Dello  
Italy



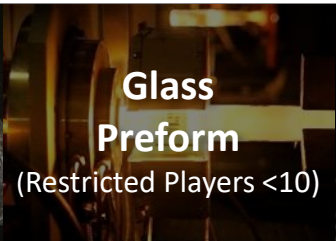
Sterlite Condu spar  
Parana  
Brazil



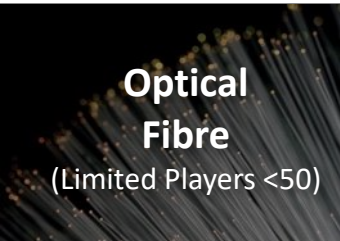
Dadra &  
Nagar Haveli  
India



Pure  
Silicon



Glass  
Preform  
(Restricted Players <10)



Optical  
Fibre  
(Limited Players <50)



Optical  
Fibre Cable  
(Cable Manufacturers <200)



Optical  
Interconnect

**STL's unique manufacturing capabilities with full vertical integration. Also top 3 integrated fibre producer globally**

7

GLOBAL  
PRODUCTION  
FACILITIES

50M

FKM OPTICAL  
FIBRE  
CAPACITY

18M

FKM OPTICAL  
FIBRE CABLE  
CAPACITY

**Industry 4.0 standards**

Fully automated machinery with robotic operations

**Efficient supply chain**

Reduced delivery times and SCM cost

# Expertise in integration of complex large-scale digital networks



## Intrusion Proof Smarter Network

**Project NFS:** \$350 million project for creating the world's largest intrusion-proof smarter network infrastructure in Jammu and Kashmir state of India for the Indian Army



**Completed**  
& moved to O&M

## Network Modernisation

**Project Varun:** \$500 million multiyear project to design, execute, operate & maintain the Indian Naval Digital Network



**76%**  
Complete

## Transformative digital inclusion

**Project Mahanet:** Connecting 7.5 million people and 4,045 villages in the state of Maharashtra



**74%**  
Complete

## Futuristic SDN ready state wide network

**Project T-Fibre:** Providing ubiquitous access of high-speed broadband in 4.5 million homes in the state of Telangana



**3%**  
Complete

## World's Largest Exabyte Network

**FTTH Roll out:** A large scale FTTH roll out for a large Indian telco



**1%**  
Complete

# Disrupting with virtual edge technologies



## Strategic Investments



'Inside' Data centre services for serving Global cloud providers, colocation providers and enterprises



A developer of open, disruptive and virtualized Radio Access Network (vRAN) solutions, delivering 4G and 5G for serving Enterprise and Telcos

## Strategic Collaborations



A leading innovator in enterprise software, to develop virtual network functions for 5G Access Solutions for converged wireline-wireless technology serving Enterprises and Telcos .



Designs and develops 5G Radio solutions like macro RU and small cells for Telcos .

## Strategic Alliances



STL has been working very closely to develop an optical transport controller to manage and control Voyager and Cassini platforms developed by TIP members.



STL has been contributing to ONAP in fields of orchestration and cloud management in this domain.



STL is working very closely with ORAN to build near real time 5G controllers.



STL has been collaborating continuously in workgroups like VOLTHA, SEBA and ONOS for productization and commercialization of these open platforms..

MIT | IIT-M  
RUTGERS

Research on innovation  
Multi-Stage fibre  
manufacturing process

Next-Gen fibre to improve  
network performance

Research and accelerate the  
advancements in 5G

MIT | RUTGERS | IIT

# Investing in technology development and adoption



## 4 Innovations Centres

with world class R&D capabilities



**358 Patents** in Optical Connectivity, Network Software & Services and Access solutions

**Innovating with Startups, Future Disruptors**

# Transforming everyday lives across communities



## Environment | Social | Governance



### SURE Packaging

Caring for the environment

**8k**

trees saved

**5.3k**

MT CO2 reduced

**5R**

Approach – Recycle, Resuse, Reduce, Refuse, Remove



### CSR Initiatives

Enabling millions

**1.32M**

lives impacted

### Our Initiatives

Education : Smart Nandghars, Digital Empowerment

Health : Mobile Medical Unit

Environment : Jaldoot, Greenbelt

Empowerment : Jeevan Jyoti



### World's 1<sup>st</sup> ZWL Certified

Driving Sustainability

**65k**

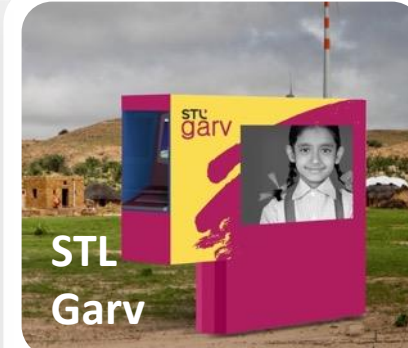
tons diverted from landfill spaces

**96%**

of our industrial waste does not go into landfill

### Reduced

CO2 emissions significantly



### STL Garv

Innovating for good

### Transform

rural India (Pilot across 3 states) for digital readiness

### Results

27% increase in internet usage

76.2% women using supplementary education

50% more usage of Govt. Apps

8.7 average user rating



### STL Academy

Skilling for a better future

**72K**

Trained Professionals

**10K**

Certified Professions

### Academy

training for deployment of future ready networks

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## Growth

- Profitable Organic Growth
- EPS accretive strategic acquisitions
- Commitment to R&D and Talent



## Earnings

- Drive sustainable EPS growth
- Attain earning objectives across economic cycles
- ROCE > 25%

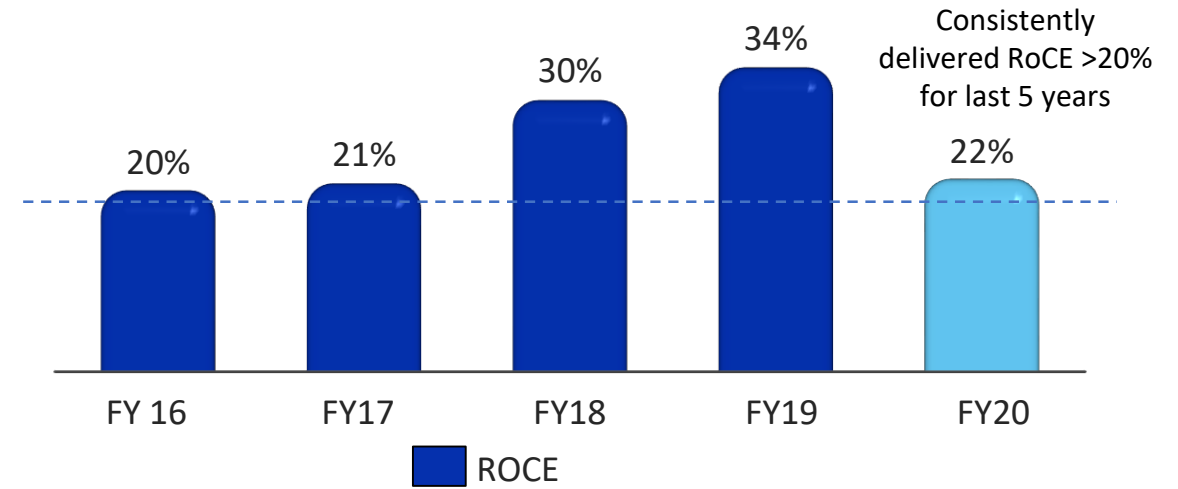
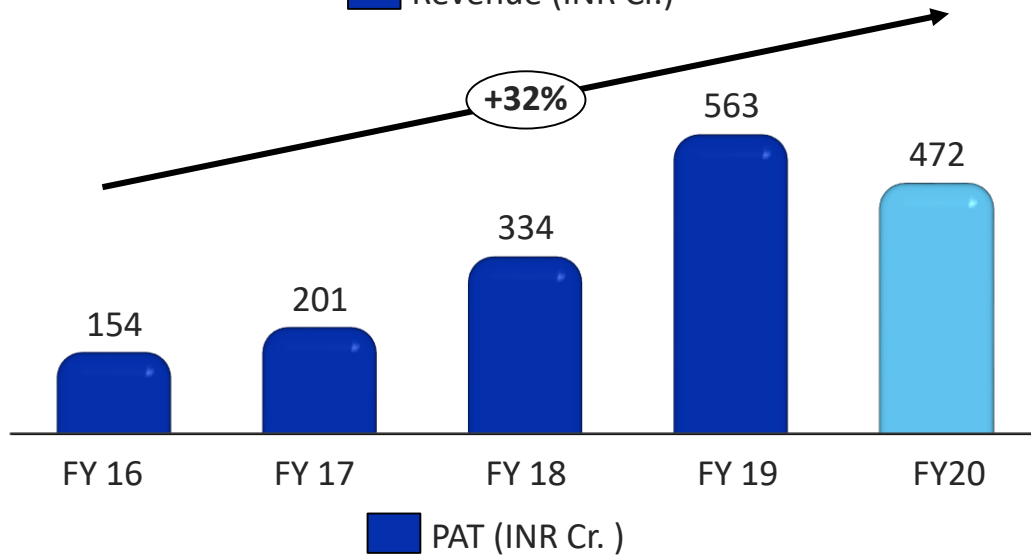
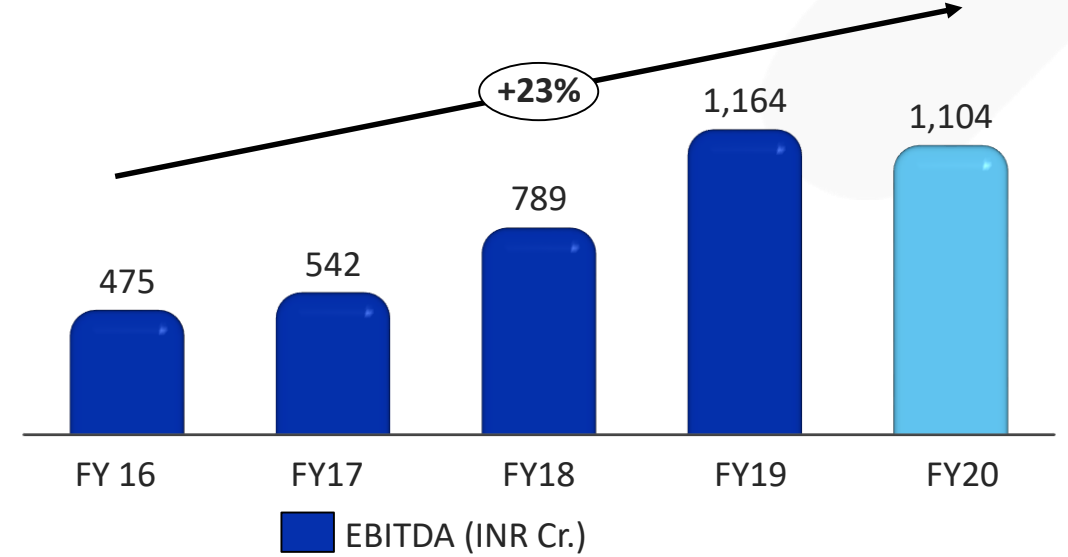
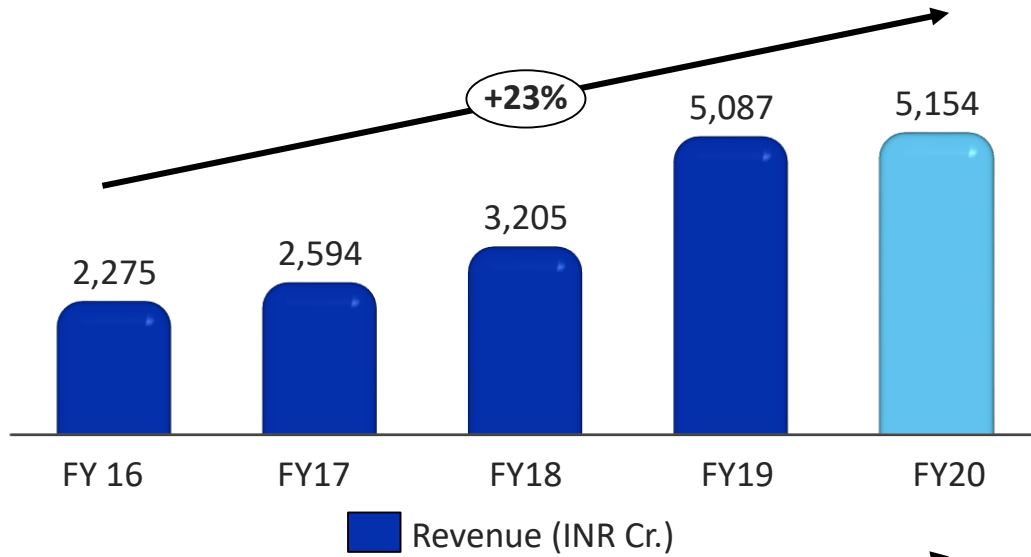


## Capital Allocation

- Focus on Free Cash Flow Generation
- Sound Leverage D/E < 1 & Working Capital management
- Stated dividend policy with consistent returns to shareholders



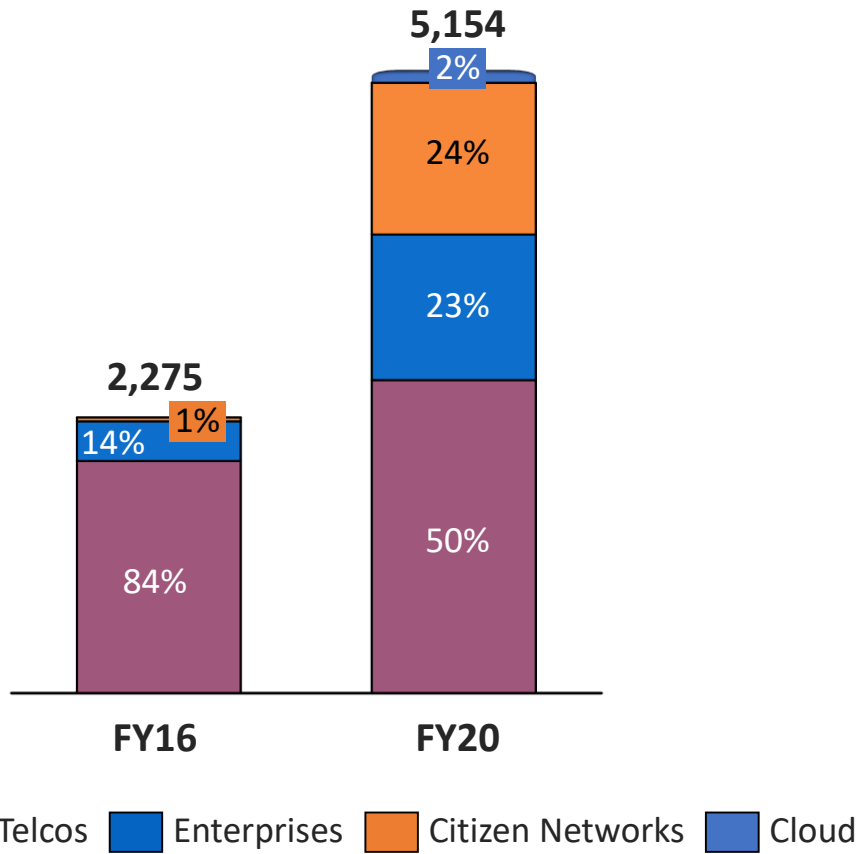
# Delivering sustainable value for shareholders



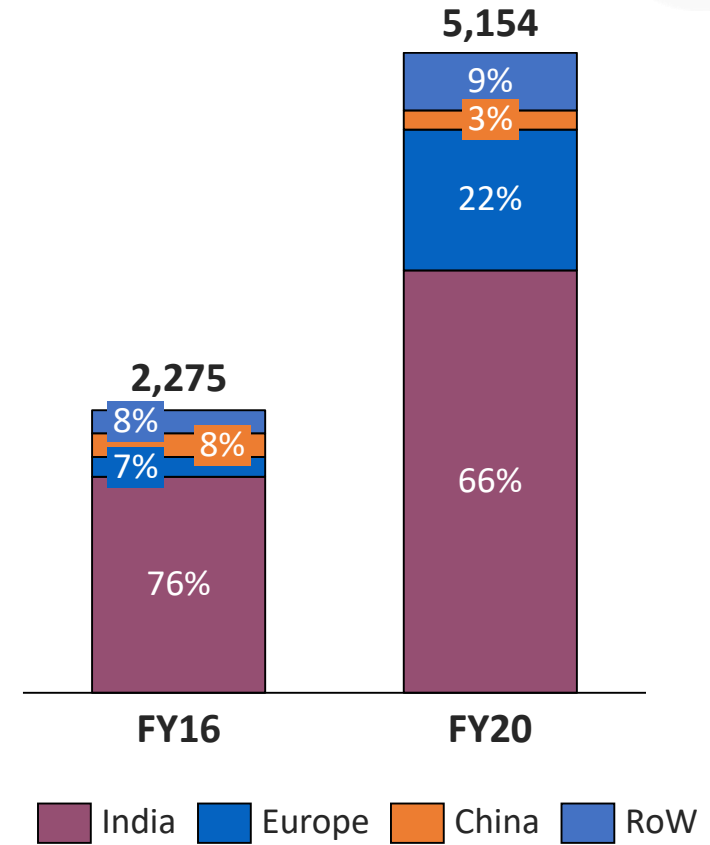
# Revenue Split



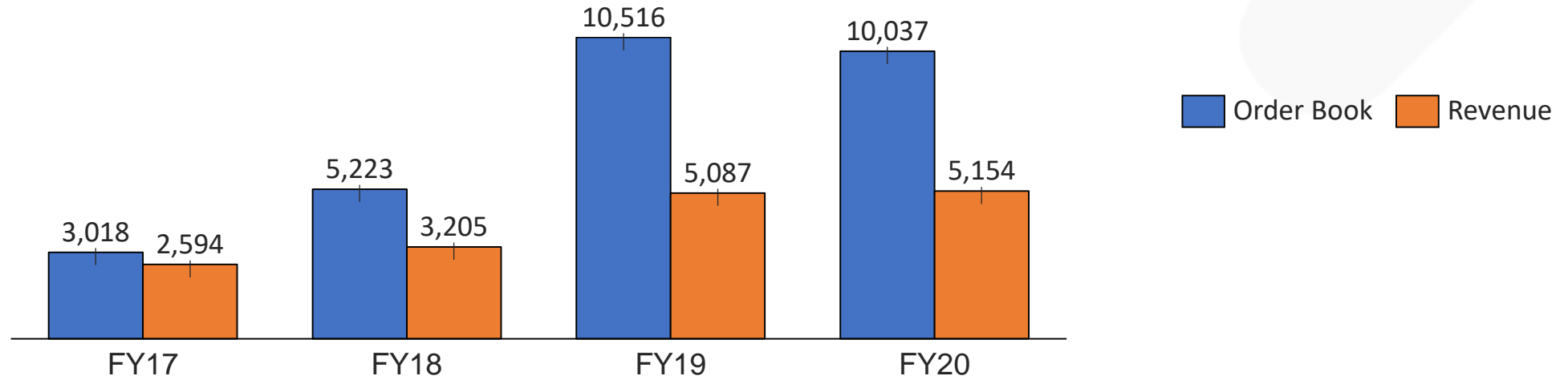
**Customer Segments**  
Revenues (Rs. Cr.)



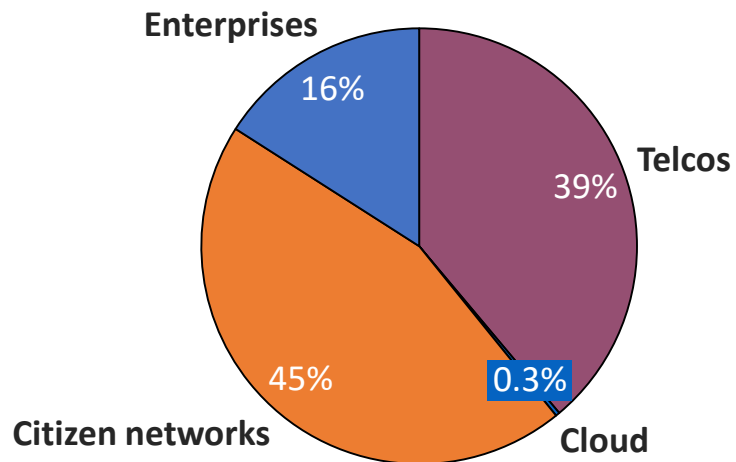
**Geographical Distribution**  
Revenues (Rs. Cr.)



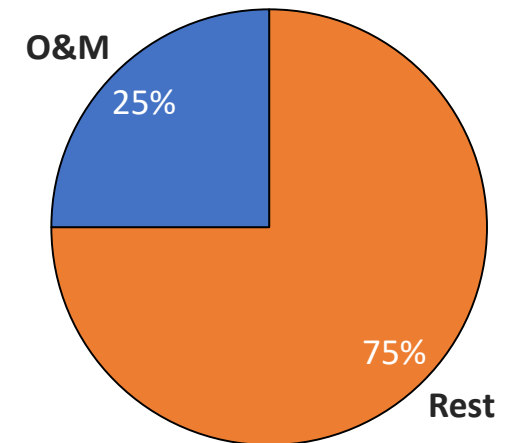
# Stable Order book



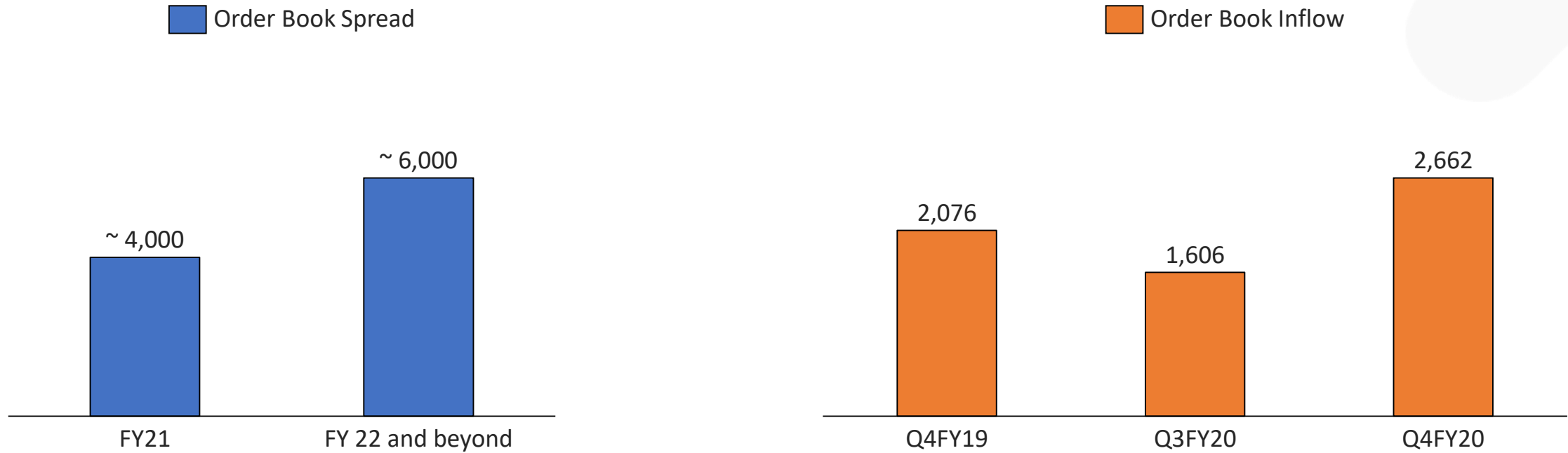
## Open Order Book Customer Segment wise



## Open Order Book Split

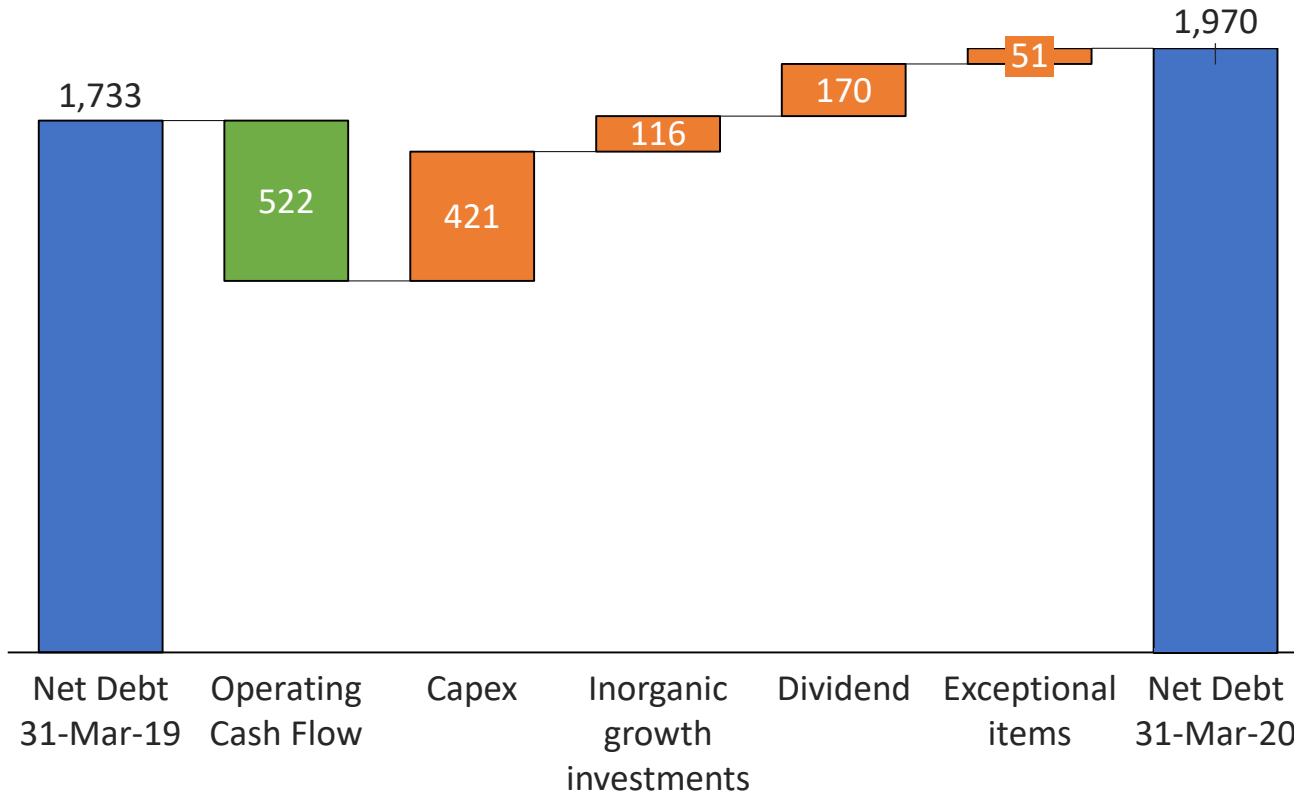


# Order book spread & inflow



***Strong RFQ Participation Funnel ~ Rs. 8,500 Cr as on 31<sup>st</sup> March 2020***

# Focus on free cash flow & sound leverage



Free Cash Flow @ consolidated level	Rs. Cr.
Cash Profit after Tax	774
(Increase) / Decrease in working Capital	(252)
Operating Cash Flow	522
CAPEX	(421)
Free Cash Flow	100

The business generated **free cash flow in FY20**

The business is carrying **cash & cash equivalents of Rs. 478 Cr.** as on 31<sup>st</sup> Mar'20  
(reflecting preparedness for the current uncertain times)

# Abridged financials



P&L (INR Cr.)	FY19	FY20
Revenue	5,087	5,154
EBIDTA	1,164	1,104
EBITDA %	23%	21%
Depreciation	195	290
EBIT	969	813
Interest	105	221
Exceptional Item		51
PBT	864	542
Tax	278	109
Net Income (After Minority Interest)	563	434
Net Income Adjusted for exceptional item net of tax	563	472

Balance Sheet (INR Cr.)	FY19	FY20
Net Worth	1,815	2,023
Net Debt	1,733	1,970
Total	3,548	3,993
Fixed Assets	2,356	2,536
Goodwill	107	122
Net Working Capital	1,085	1,335
Total	3,548	3,993

# Annexure



Company  
Overview

**1**

The Digital  
Networks  
Growth Story

**2**

STL  
Strategy

**3**

Our Unique Value  
Proposition

**4**

STL  
Financials

**Annexure**

# Strong corporate governance



## Independent Directors on the Board of STL



### Kumud Srinivasan

*(Non-Executive & Independent Director)*

- VP and Director of Non-Volatile Fab Manufacturing and Automation Systems at Intel Corporation
- Has spent 30 years at Intel in US, leading multiple global functions, prominent ones being R&D for technology manufacturing, industrial automation and IoT for manufacturing facilities
- She served as the President of Intel India from 2012 to 2016



### Sandip Das

*(Non-Executive & Independent Director)*

- One of Asia's most respected telecommunications professionals and an acclaimed Chief Executive
- Ex-MD of Reliance Jio, Group-CEO, Maxis Communications and Hutchison Essar Telecom (now Vodafone), India
- One of the founding members of private telephony in India and was part of the group of individuals that founded Hutchison Max Telecom in 1994



### A. R. Narayanaswamy

*(Non-Executive & Independent Director)*

- Chartered Accountant & Management Consultant with over 35 years of industry experience
- Member of The Institute of Chartered Accountants of India
- Provides consulting services in accounting, financial management and information technology across several industry verticals



### Arun Tadarwal

*(Non-Executive & Independent Director)*

- Partner of Tadarwal & Tadarwal, a Mumbai based firm of Chartered Accountants
- Member of The Institute of Chartered Accountants of India
- Has rich and varied experience spanning over three decades in management consultancy, finance and audit

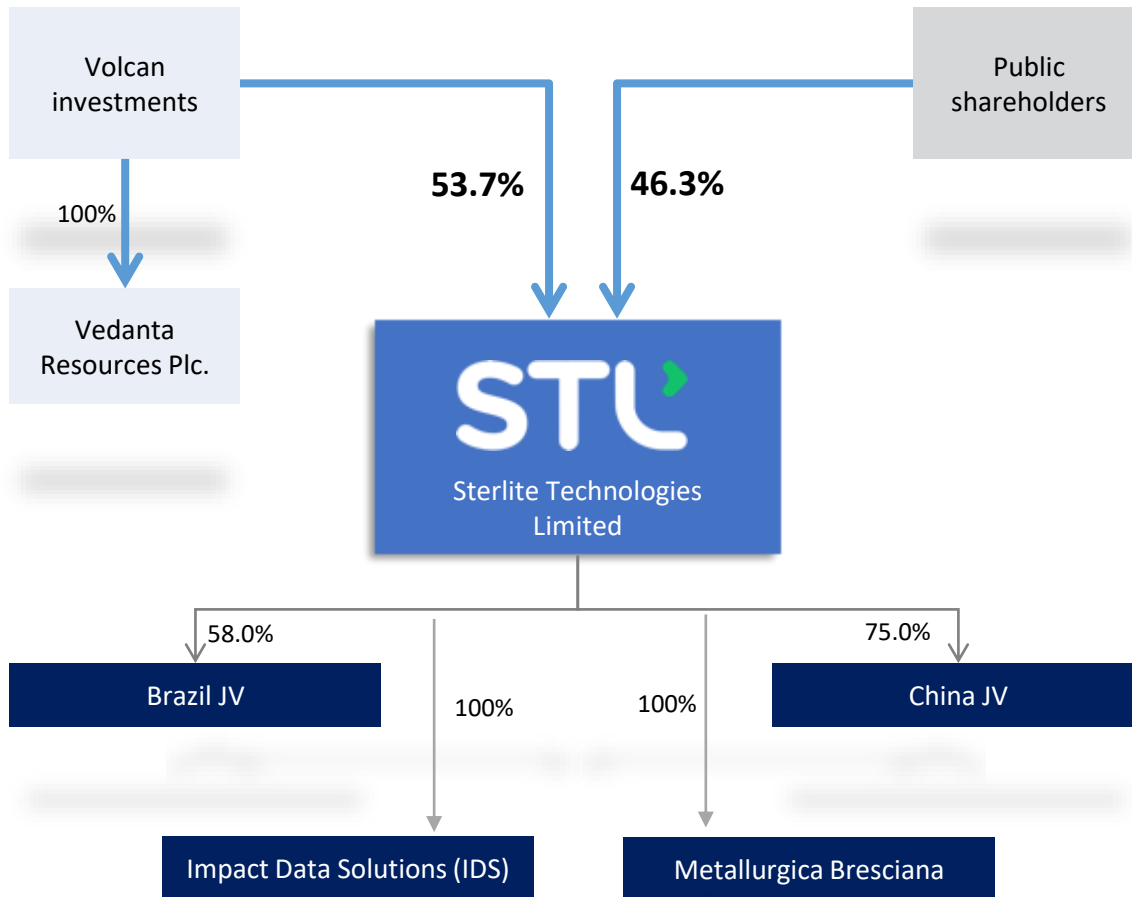


# Corporate Structure & Shareholding Pattern



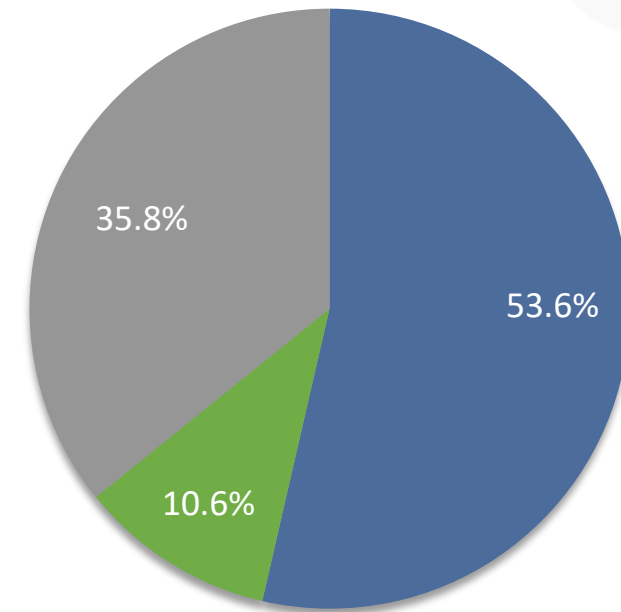
## Corporate structure

Only Material Subsidiaries are disclosed



## Shareholding pattern

Source: Company information; Karvy Shareholding Services; Data as of Mar 31st, 2020



- Promoters & Promoter Group
- Institutional Holding
- Non Institutional Holding

# Our Values



hunger to  
learn



keep it  
simple



promises  
delivered



respect &  
empathise

# STL Leadership



**DR. ANAND  
AGARWAL**

Group CEO And Whole-Time  
Director

Dr. Anand Agarwal is the Group CEO of STL and is passionate about driving technological advancement to impact everyday lives. Recognising the exponential growth in data consumption and shifts in the global technology landscape, Anand has navigated STL from an optical connectivity company to a global leader in end-to-end data network solutions.

Anand is driving STL as an industry leading integrator of data networks with core capabilities in optical connectivity, radio engineering and networking software. Anand was honoured with the prestigious 'Broadband Infrastructure Leader Award' in 2016 and "Pathbreaker of the Year" in 2019 for transforming India's digital infrastructure at the Telecom Leadership Forum.

A PhD in Materials Engineering from Rensselaer Polytechnic Institute and B.Tech from IIT Kanpur, Anand is a hands-on technologist on advanced photonics and programmable networks. He is a firm believer in empowering and transforming lives through innovations in technology.



[@anandagarwal2](#)



[@anand1agarwal](#)

# Led by an Executive Team with extensive Experiences



**ANUPAM JINDAL**  
Group Chief Finance Officer



**ANKIT AGARWAL**  
CEO, Connectivity Solutions  
Business



**KS RAO**  
CEO, Network Services and  
Software Business



**DR. BADRI GOMATAM**  
Group Chief Technology  
Officer



**GAURAV BASRA**  
Chief Strategy Officer



**ANJALI BYCE**  
Chief Human Resources  
Officer



**MANISH SINHA**  
Chief Marketing Officer



**NISCHAL GUPTA**  
Chief Transformation Officer



**AKANKSHA SHARMA**  
Head CSR And Sustainability

Great  
Place  
To  
Work®

Certified  
JUN 2019–MAY 2020  
INDIA

# Certified as a Great Place to Work

STL

30+

NATIONALITIES

~ 3,100 Employees  
– Each one is STLer

# Thank You



beyond tomorrow