June 12, 2023

The Listing Department
**BSE Limited**
Phiroze Jeejeebhoy Towers
Dalal Street
Mumbai 400 001
BSE SCRIP Code: 543425

The Listing Department
**National Stock Exchange of India Limited**
Exchange Plaza
Bandra Kurla Complex, Bandra (East)
Mumbai 400 051
NSE Symbol: MAPMYINDIA

**Subject:** Submission of revised Investor Presentation for Analyst & Investor Day 2023
**Ref.:** Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

Dear Madam / Sir,

This is further to our letter dated June 09, 2023, wherein we uploaded the Investor Presentation for Analyst & Investor Day 2023 held in Mumbai on June 08, 2023.

In this regard, we would like to inform that an inadvertent error occurred in the said Presentation on Slide 48. The amount mentioned in the slide under the 'Consideration' column against Indrones Solutions Private Limited has been rectified and hence, changed from Rs. 3 Crores to Rs. 7 Crores.

Accordingly, please find attached herewith revised Investor Presentation for Analyst & Investor Day 2023 held in Mumbai on June 08, 2023

Kindly acknowledge the receipt of the same.

Thanking you.

Yours faithfully,
**For C.E. Info Systems Limited**

Saurabh Surendra Somani
Digitally signed by Saurabh Surendra Somani
Date: 2023.06.12 14:36:46 +05'30'

**Saurabh Surendra Somani**
**Company Secretary & Compliance Officer**

**Encl:**
**Investor Presentation**

MAPPLS
MapmyIndia

# C.E. INFO SYSTEMS LIMITED

*India's Leading Advanced Digital Maps, Geospatial software and Location-based IoT Company*

## Analyst & Investor Day 2023

8th June 2023

# Agenda

- Founders' Perspective
- Mapping our Five-Year Strategy
- Navigating the Future of Auto
- Transforming Corporates
- Building Geospatial Business
- Capturing the IOT Opportunity
- Walk through Tech Experience Center

# Founders' Perspective

Rakesh Verma, Co-founder, Chairman & Managing Director

# Our Mission & Vision

Rakesh Verma
Co-founder and CMD

Rashmi Verma
Co-founder and CTO

## 28 years ago ...

...we envisioned that some day **a significant percentage of all data would have a location dimension to it**, and that such data would be critical in solving myriad problems faced by businesses, government and consumers

We **make in India, for India, and for the world**

Building **high precision 4D digital map twin of the real world** that digitally & geospatially represents **the real world in near real-time...**

**through our proprietary, digital map data acquisition, processing, productization and dissemination platforms and technologies**

**...and** providing **geospatial software & IoT technology platforms, products and solutions**, for emerging platforms and market opportunities

Our **mission** is to bring the infinite benefits and use cases of digital maps and location technologies to everyone

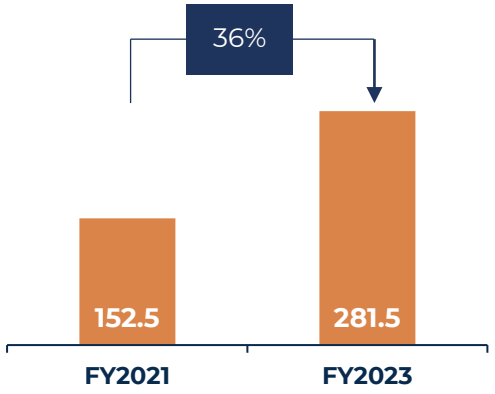
# Mapping our Five Year Strategy

Rohan Verma, Chief Executive Officer & Executive Director

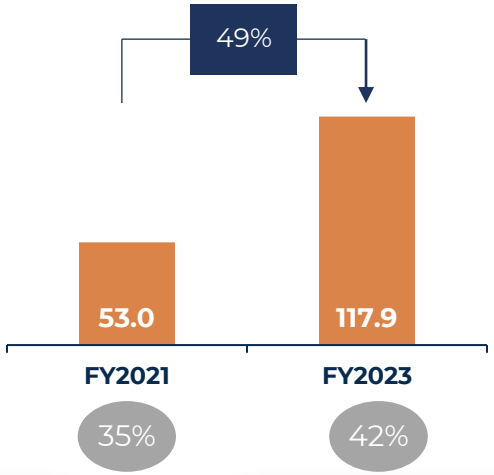
# Where do we stand today?

*(Figures in the top panel are in Rs. Crores)*

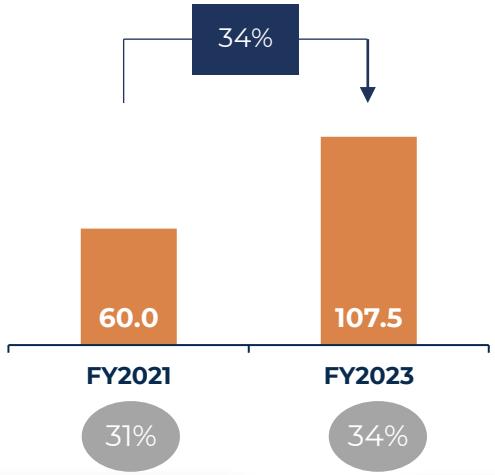
## REVENUE FROM OPERATIONS



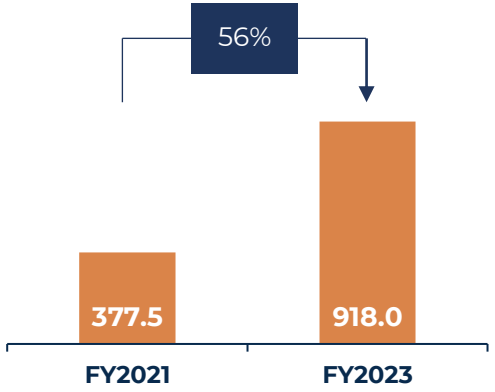

## EBITDA




## PAT

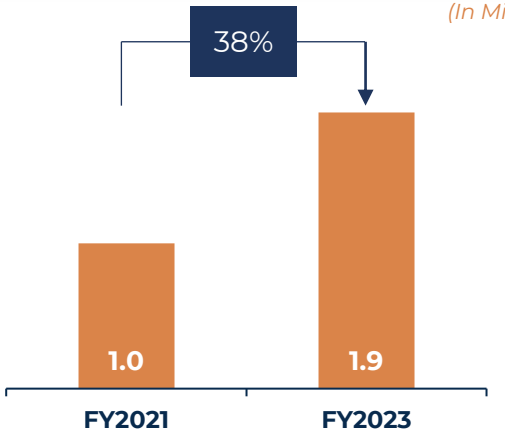



## OPEN ORDER BOOK



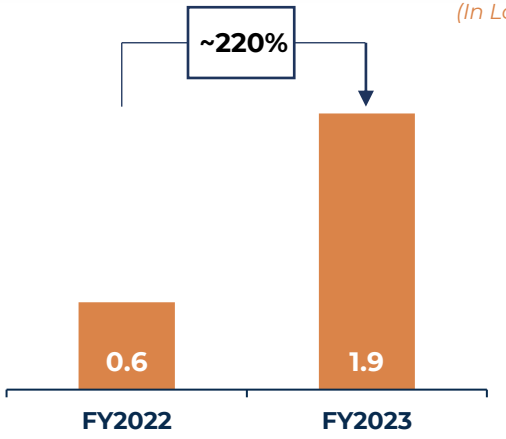

## NEW VEHICLES ATTACHED WITH OUR TECH

*(In Million)*




## IoT DEVICES SOLD & RENTED

*(In Lacs)*




## CUSTOMER BASE

*(In #)*

2-year CAGR
Margin (%)

# Digital Maps & Technology Products & Platforms Company

## MaaS

Digital Map & Geospatial Data Products

## SaaS

N-CASE Suite for Auto OEMs

IoT Saas for Mobility & Logistics (InTouch, Locate, Devices)

Geospatial-led SaaS for Enterprise Digital Transformation (mGIS, Workmate, Insight)

Consumer location-based Mappls apps & Mappls gadgets

## PaaS

Developer APIs & SDKs

## B2B & B2B2C Customer Segments

- Automotive OEMs
- Corporates
- Government
- Mobility

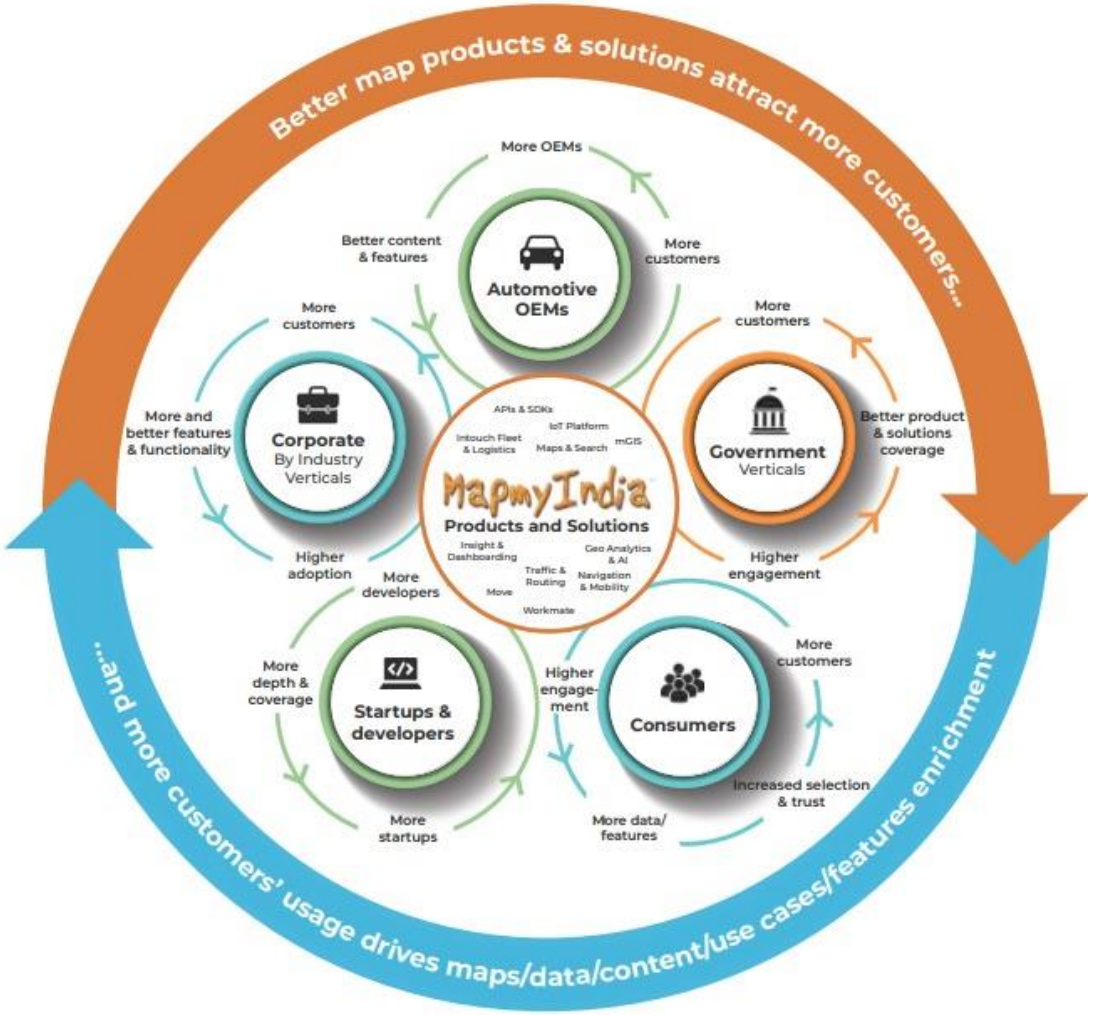
## Revenue Model

- ANNUITY
- PER VEHICLE
- PER USER
- SUBSCRIPTION PER DEVICE
- PER API TRANSACTION
- PER USE CASE
- PER ASSET

# Our Right to Win

- Proprietary end-to-end technology-driven and AI-assisted mapping systems
- Comprehensive digital map database created for India through professional field surveys, collection and compilation of geographical data
- Highly differentiated, unique digital asset (maps) that is difficult to replicate, as well as tailwinds due to regulation favouring indigenous players

## Network Effects




- Integration of our digital maps with our internet-connected platforms
- Increasing usage of products by customers, creates a network (flywheel) effect
- Continuously increasing the value proposition of our offerings and help grow our business

# Our 5-Year Plan

## Plan to cross Revenue Milestone of Rs 1000+ Cr by FY27/FY28, a CAGR of 35-40%

| FY27/FY28 Market Segments | Potential Addressable Market | Expected Industry Adoption | Weighted Average Ticket Size* | Industry Revenue Potential (Rs Cr) |
|---|---|---|---|---|
| Auto OEM | 25 Mn Vehicles | 6 Mn Vehicles | Rs 800 | 500 |
| Corporate | 5000 Customers | 1000 Customers | Rs 1 Cr | 1000 |
| Government | 5000 Customers | 1000 Customers | Rs 1.2 Cr | 1200 |
| Mobility | 340 Mn Devices | 30 Mn Devices | Rs 2000 | 6000 |
| | | | Total | 8700 |

*Industry estimates as per Company; Weighted average based on category of customers and products. Actual ticket size will vary

| MapmyIndia | FY23 Existing Volume | Volume Growth Plan FY27/28 vs FY23 |
|---|---|---|
| Auto OEM | 1.9 Mn Vehicles | 3x |
| Corporate | 100+ Customers | 5x |
| Government | 30+ Customers | 6x |
| Mobility | 0.25 Mn Devices | 10x |

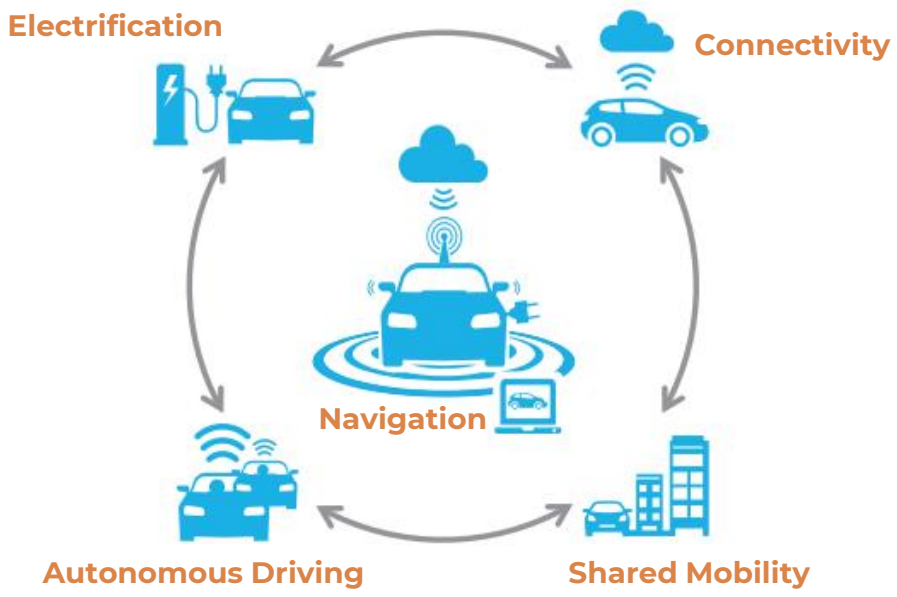
Market Segment A&M constitutes Auto OEM plus some parts of Mobility and C&E constitutes Corporate, Government and balance parts of Mobility

# Navigating the Future of Auto

Sapna Ahuja, Chief Operating Officer

# Our Universe

**Transitioned from Navigation to Navigation-led Auto-tech that the industry needs..**




NCASE - Navigation-led Connected, Autonomous, Shared, Electric Mobility Platform and Solutions

- **Market**: Automotive OEMs
  - Segments: Passenger Cars, 2-wheeler, Commercial Vehicles across Electric and ICE Vehicle OEMs
- **Products**: NCASE Platform
  - Embedded Connected **N**avigation
  - **C**onnected Mobility Platform and solutions including H/w, S/w Platform, Applications
  - Maps as Sensor for **A**DAS and Autonomy, making vehicles Safe
  - **S**hared Mobility Platform for 'Mobility-as-a-Service'
  - **E**lectric Mobility platform solving range anxiety and charge anxiety challenges with accurate range calculation; battery efficient navigation; battery analytics, and driver coaching solutions
- **Revenue Model**:
  - Per vehicle per year per *module

# Key Use Cases (1/3)

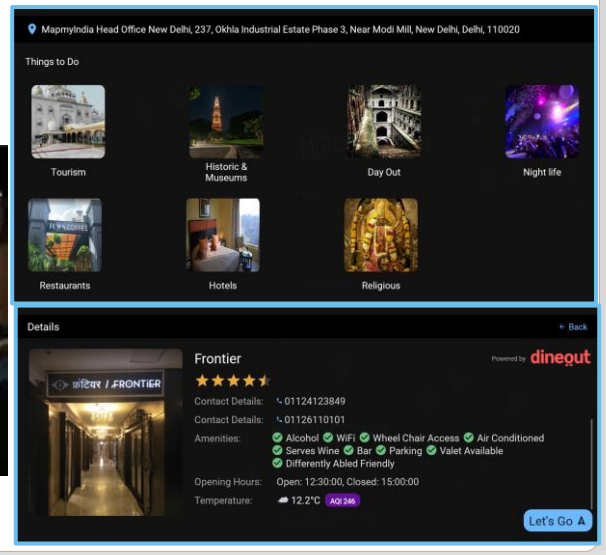
## Embedded Connected Navigation

- Need for turn-by-turn directions with minimal driver distraction, no dependency on mobile phone, enabling discovery, travel and convenience for seamless in-car bookings and payments
- **Product:** Mappls Auto and Mappls Kogo
- **Revenue Model:** Per vehicle per year

### 2W: Ola Electric

### 4W: Mahindra XUV 700

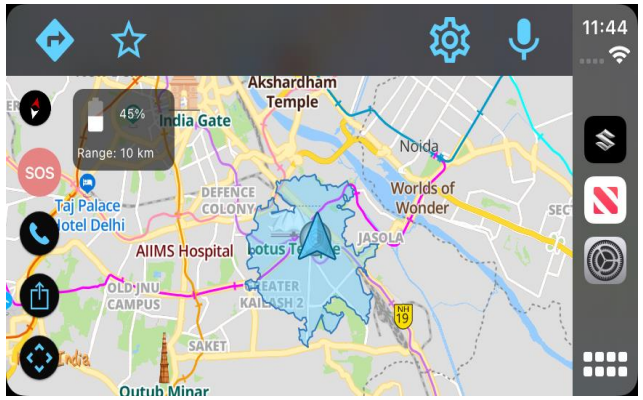
### 4W: MG Hector

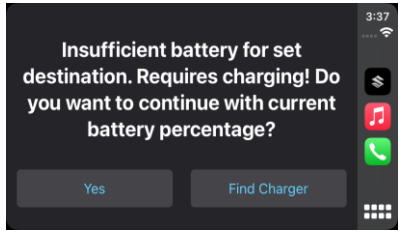


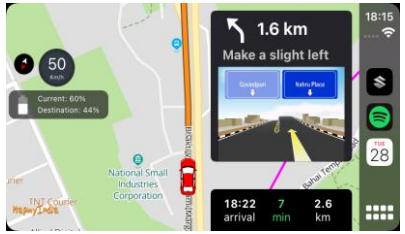
# Key Use Cases (2/3)

## Electric Vehicle Range Calculation

- Concerns over EV battery not having sufficient charge to reach destination (Range anxiety) and lack of charging infrastructure (Charge anxiety) are common challenges impacting EV adoption
- **Product:** Mappls AI Battery Consumption Model for accurate EV Range Calculation, Battery Efficient Navigation and Nearby EV Charge Stations APIs
- **Revenue Model:** Per vehicle per year




## Intelligent Speed Assistance

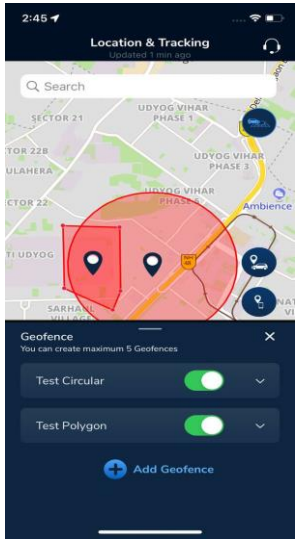
- Safety has been a critical problem statement with increased number of accidents each year; MMI feeds in information related to speed limits, sharp curves, potholes, road conditions to both the driver and vehicle. System can then actively prevent drivers from exceeding the speed using map-based speed limit database.
- **Product:** Mappls eHorizon solution with ADAS Maps
- **Revenue Model:** Per vehicle per year

# Key Use Cases (3/3)

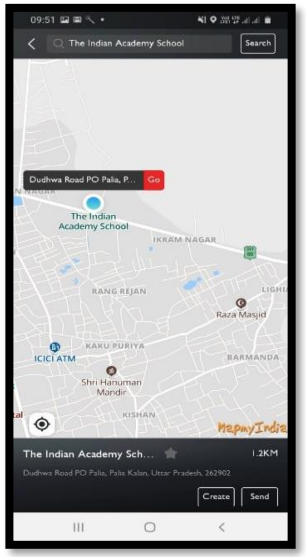
## Connected Vehicle

- Need for vehicles to be connected for enabling use cases for both customers (Tracking, Trip planning and sharing, Alerts, Remote controls the vehicle, health diagnostics, driver scoring etc.)
- **Product:** Mappls Maps Cloud, Mappls IoT (Telematics Control Unit); Mappls Connected Vehicle Cloud Platform
- **Revenue Model:** Per vehicle per year for MaaS

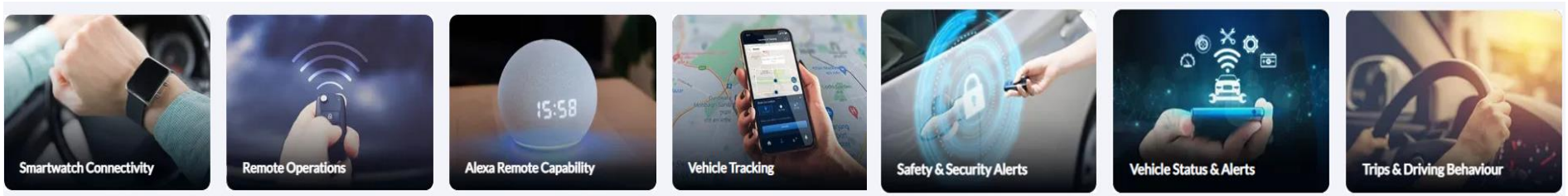
**Maruti Suzuki: Connect App**




**MG: iSmart App**



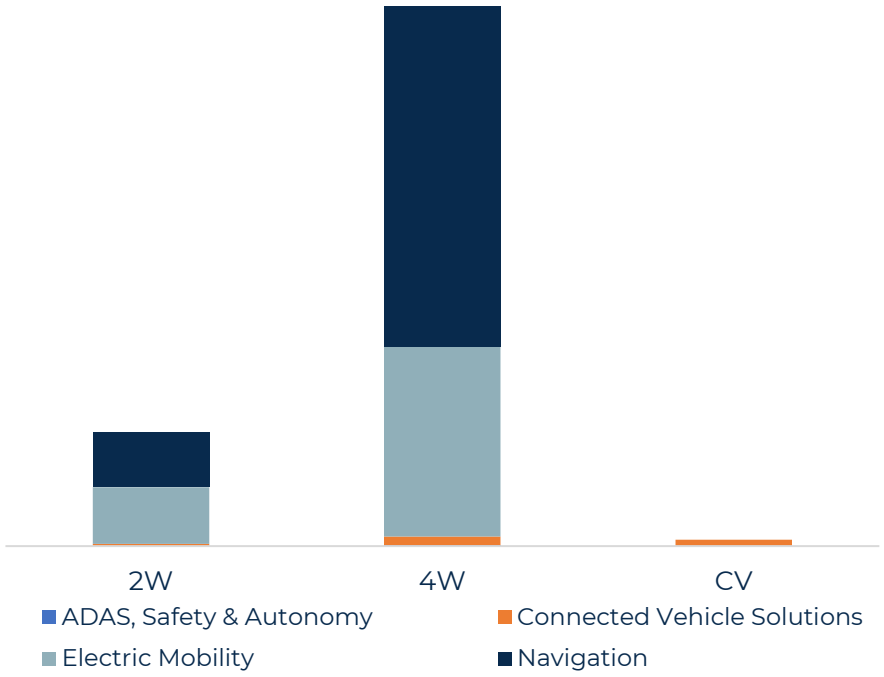

**Mahindra: Adrenox & Blusense**



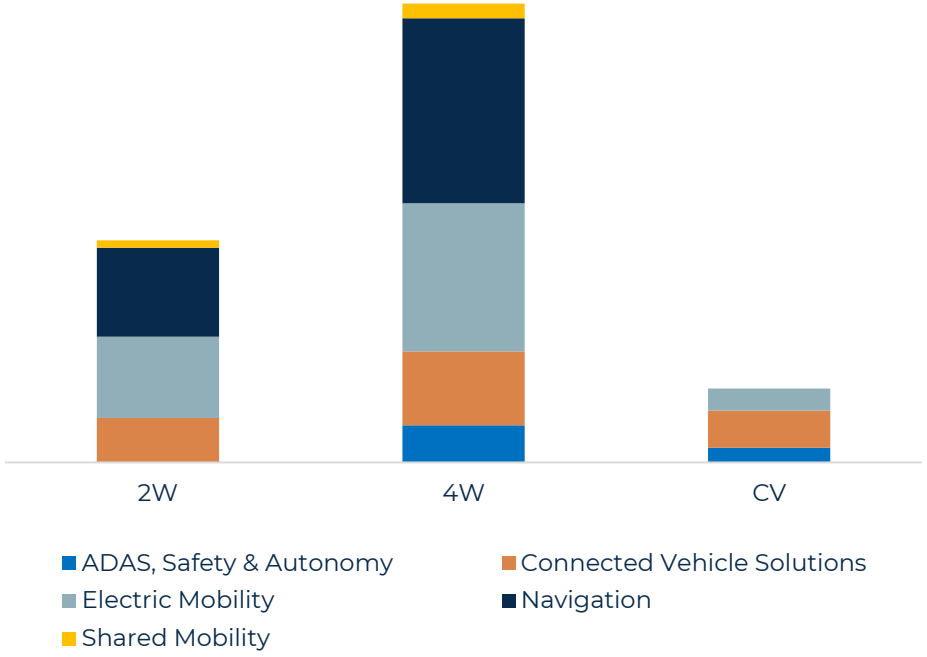
# Order Book Mix

**Changes in order mix across market segments and product categories**

## FY23




## FY28E

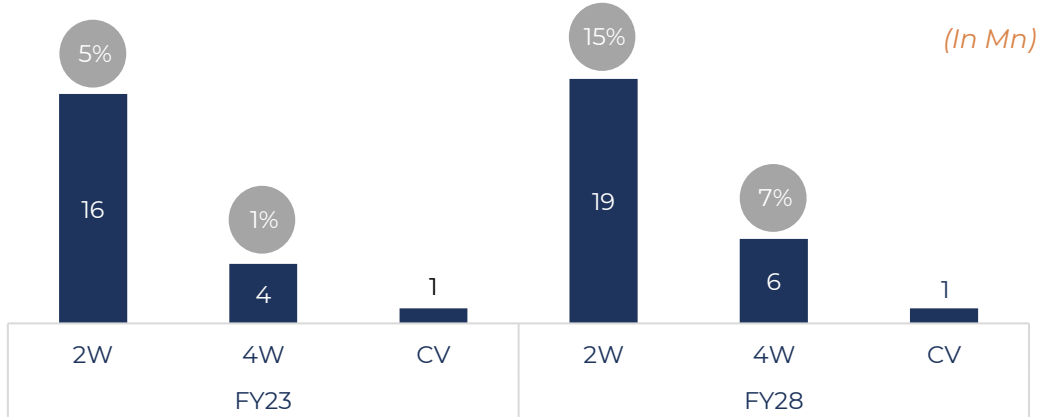



This is to give a sense of the qualitative color of the Order Book. Numbers are not to scale.

# Addressable Market

| Number of vehicles manufactured during the year | FY23 | FY28E | FY23-28 CAGR |
|---|---|---|---|
| **Auto OEM** | | | |
| **Industry Number of vehicles (Mn)** | **21** | **25** | **4%** |
| **- 2W** | **16** | **19** | **3%** |
| **- EV** | **0.8** | **2.8** | **27%** |
| **- 4W** | **4** | **6** | **7%** |
| **- EV** | **0.05** | **0.4** | **57%** |
| **- CV** | **1** | **1** | **5%** |
| **Number of vehicles (Mn)** | **2** | **6** | **3x** |
| **Industry Map & Tech Attach Rate** | **11%** | **25%** | |

**Source:** SIAM, Vahan, Company estimates




Total number of vehicles
% EV to Total Vehicles

- Industry attach rate currently in India is 11% vs global attach rate of 50-60%
- EV is expected to play a big role in increase in the overall attach rate
- In FY '23, MapmyIndia's attach rate was 1.9 Mn around 80% market share*. We expect to grow 3x in volume; and with higher adoption of newer NCASE use cases, we expect to grow the business by 4x

## Right to Win

- Trusted Auto OEM partner for over 15 years
- 100% IP and full control over all critical components of our solutions
- Localization of components to support 'Make in India' product need of the OEM customers
- With recent regulation, we have a clear edge over competition to create and maintain High-Definition Maps for ADAS and Autonomy solutions
- Strong focus on road safety (need of the industry) across all our products

**Most importantly, state-of-the-art technology and future-ready with MMI NCASE platforms**

*As per Frost & Sullivan Industry Report

# Future of Mobility

- By 2030, **95%** of the vehicles sold across the world will be connected cars, up from 50% today
- Connected Mobility could expand revenue pools for Auto OEMs by about **30%** in addition to traditional car sales
- **Increasing adoption** of globally accepted safety ratings, leading to innovations in soft ADAS & innovative road safety solutions

- Offering a seamless user experience with customizable infotainment & personalized assistance
- Reducing cognitive load by providing flexibility & a modular interface concept
- Multi-screen implementations to address needs of both drivers and co-passengers

**Self-aware vehicle with ADAS, ISA, HD Maps & E-Horizon**

**In-Car Commerce, Car-as-a-wallet, E-Concierge**

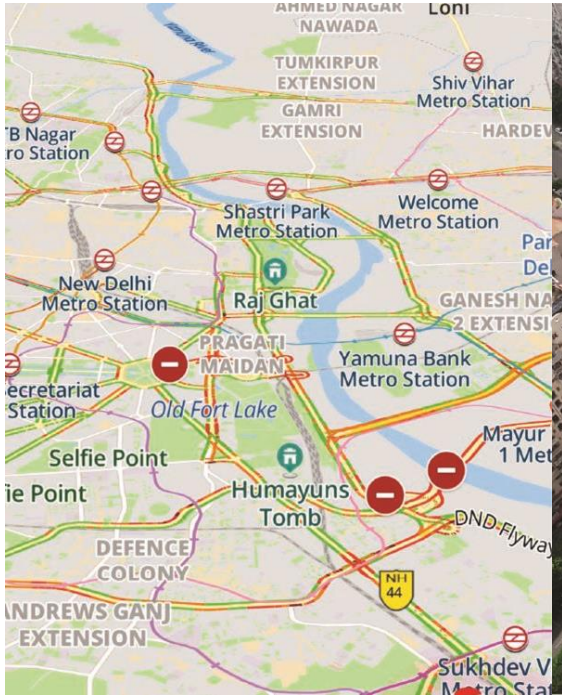
**Personalization & Seamless Connectivity**

**ICE & EV Efficient & Comfortable Driving**

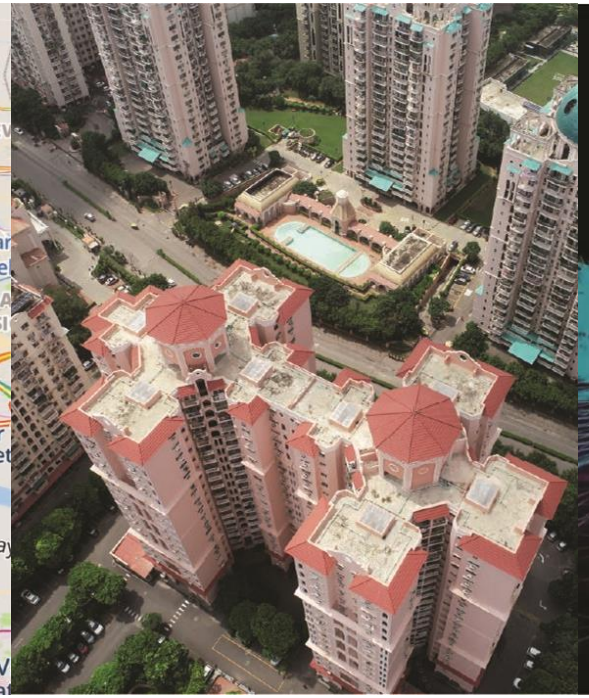
# A Glimpse of some of our Products

## India's best & most advanced digital maps built for precision using cutting-edge technologies

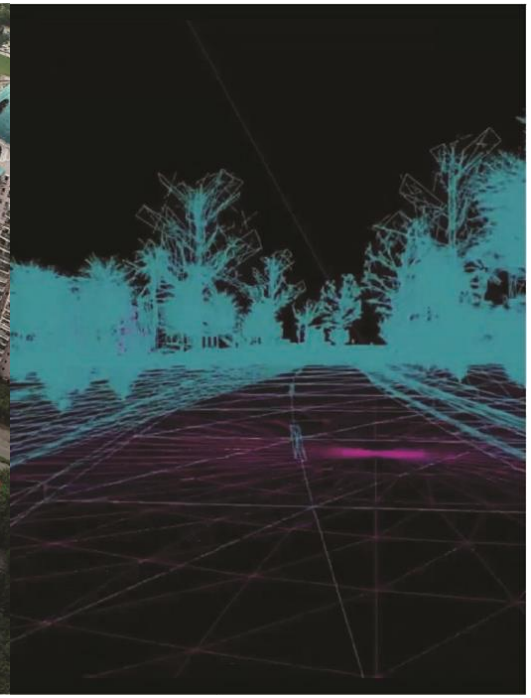
**Live Maps**



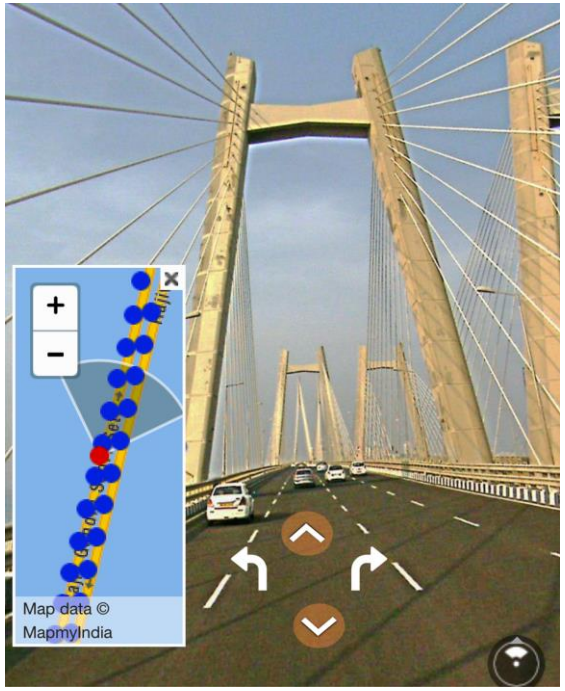

**3D Metaverse**



**HD Maps**



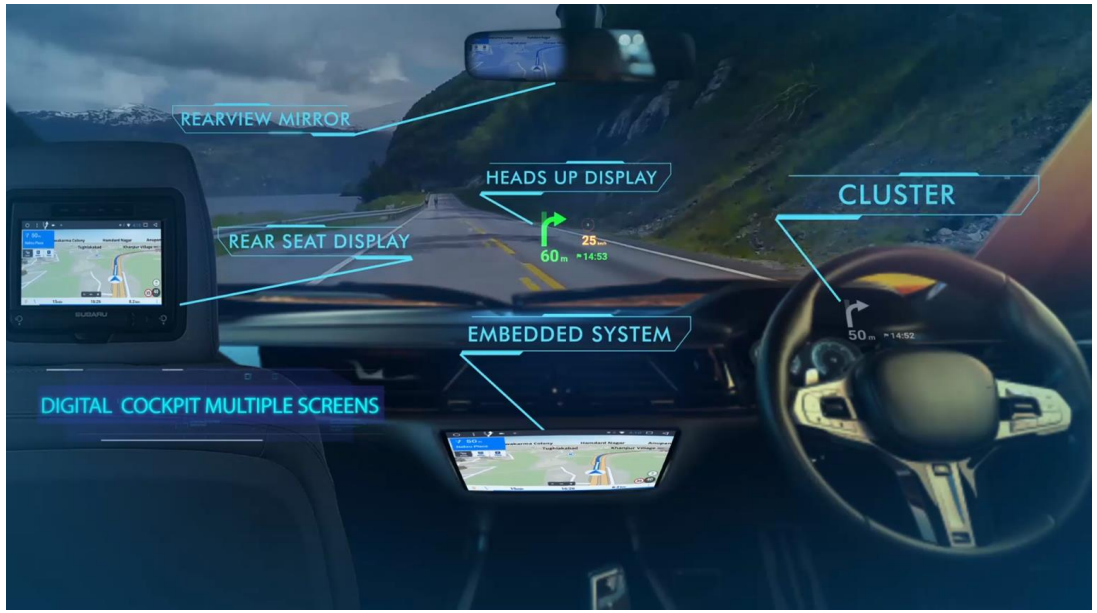
**RealView**




**Unparalleled coverage, accuracy, detail, features & freshness for India**

# A Glimpse of some of our Products

**Multiscreen Digital Cockpit**




**Intouch for Connected Vehicle Platform**

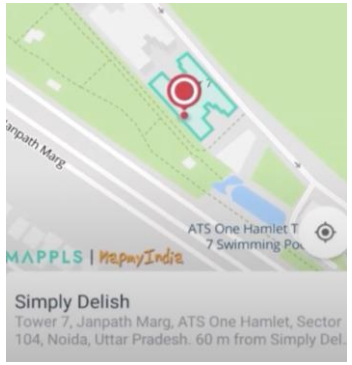
**A next-gen talking cockpit experience for intelligent, proactive, personalised, entertaining interactions**

# Transforming Corporates

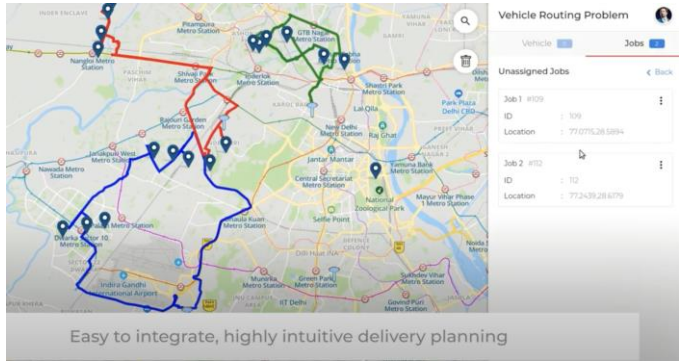
Ankeet Bhat, Chief Business Officer, Enterprise Business

# Our Universe

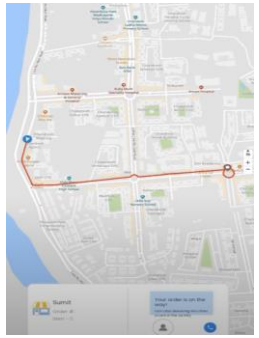
## Few illustrative images of our products in action..



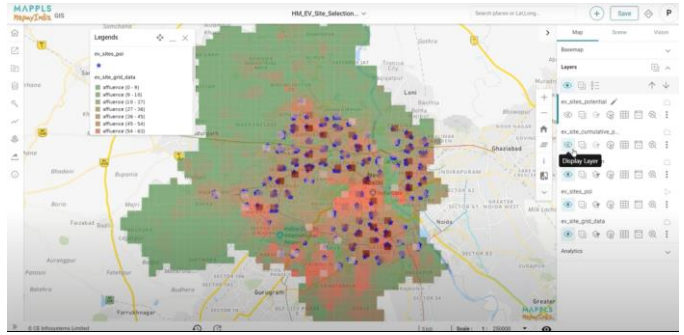

Address capture SDKs




Delivery planning



Live tracking of delivery



Customer spread analytics

- **Market:** B2B -> Corporate
- **Verticals:**
  - Digitally Native
  - Conventional
- **Offering:**
  - **MaaS:** Map & location data
  - **PaaS:** APIs & SDKs
  - **SaaS:** Software products (mGIS, WorkMate, Intouch)

# MapmyIndia's Digitally Native & Conventional Verticals (1/2)

## Digital Customers

- Our Digital customers are helping **organize** the unorganized economy e.g. market places, easy financing, online gaming etc. & creating **new experiences** like UPI, door step delivery, ride hailing, connected devices etc.

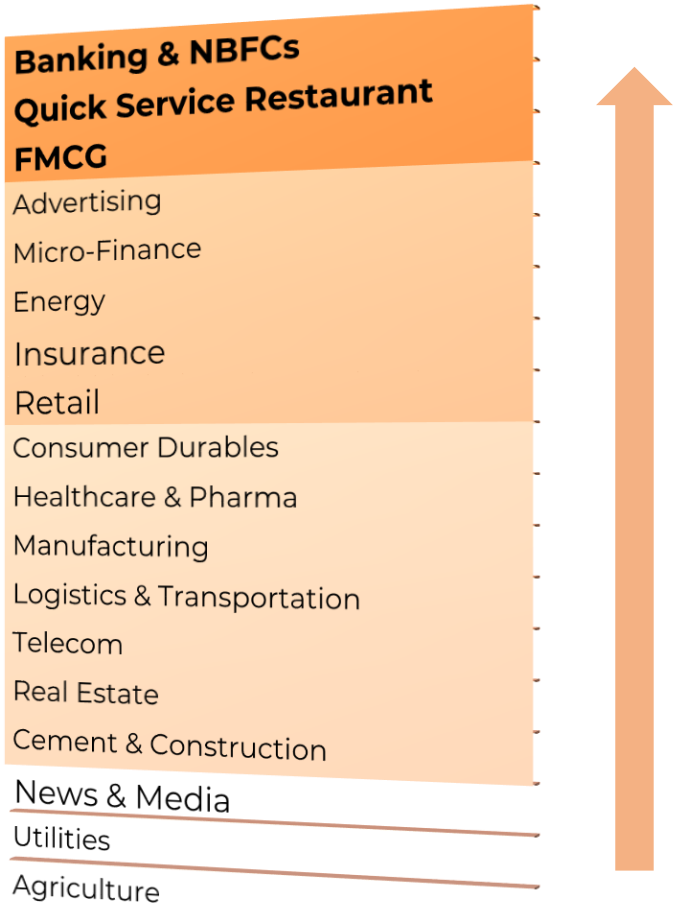
  - Location intelligence is an indispensable element in each of their technologies to know the physical world better, whether for hyperlocal discovery, consumer intelligence, store-to-door experiences, etc. Location creates the best bridge between the **physical and the digital**.

# MapmyIndia's Digitally Native & Conventional Verticals (2/2)

## Conventional Customers

- Our Conventional customers are using more location technology in their systems & processes to become faster & smarter, & are also showing maps & using location technologies in their customer facing apps whether mobile or web.

- In general, for better **field operations**, more accurate **site selection & consumer understanding**, efficient **delivery & logistics** – location technology is critical



# Key Use Cases (1/2)

## A Global Big Tech Company

- For their **maps product in India** powered by MapmyIndia's map data
- **Product:** Digital map data in the customer's format or APIs customised to their use case
- **Revenue Model:** Annuity for 5 years

## A Global Ecommerce company

- For **ecommerce and logistics operations** using Map Data for route optimisation, delivery planning, delivery analytics etc.
- As well as for their consumer facing voice service, using our APIs
- **Product:** Map Data and/or APIs
- **Revenue Model:** Annuity for 5 years & per API transaction

## A large NBFC

- Use cases are **credit assessment, field force automation, verification, hyperlocal discovery**, etc.
- **Product:** APIs & SDKs, mGIS
- **Revenue Model:** Per API & SaaS usage transactions with a minimum guarantee for 5 years, & per user per year

## A large Indian FMCG Company

- **Field force automation** to automate field operations such as reimbursement, customer visits/tasks, attendance etc.
- **Product:** Workmate suite of applications
- **Revenue Model:** Per field user per year

# Key Use Cases (2/2)

## A Last mile Delivery company

- Tech to enable **Last mile delivery of goods**. involving rider tracking, rider analytics, rider pay outs basis distance travelled, fleet management of multiple riders, live tracking of rider for consumer, etc.
- **Product:** APIs
- **Revenue Model:** Per transaction or per delivery order

## A Consumer FinTech & Hyperlocal Commerce company

- **Hyperlocal discovery**: discover stores or the offline network of the brand or company through search or proximity on a map. This use case is something every brand that has a direct customer reach needs to implement, for better discovery of their stores from consumers either looking for their goods or services in industries like retail, finance, payments, insurance, healthcare, consumer appliances, apparel, etc.
- **Product:** APIs
- **Revenue Model:** Per transaction

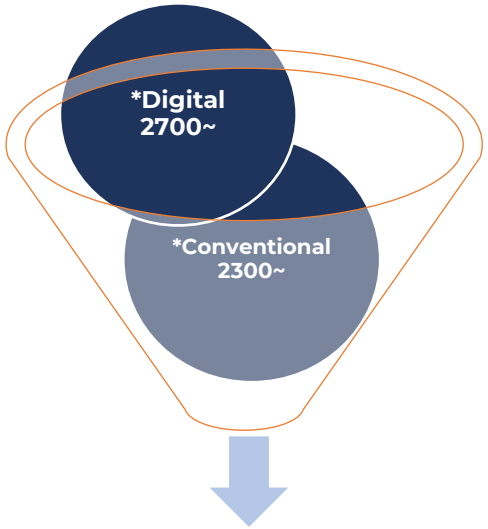
## A QSR company

- Software to help **better site selection of stores** and assist their site research.
- **Product:** mGIS
- **Revenue Model:** Per user per year

## An Advertising & Marketing agency

- Map Data (granular demographics and place intelligence) to help **better ad-targeting of consumers** and help them sell more ad-products to their clients
- **Product:** Digital map data
- **Revenue Model:** Annuity for 5 years

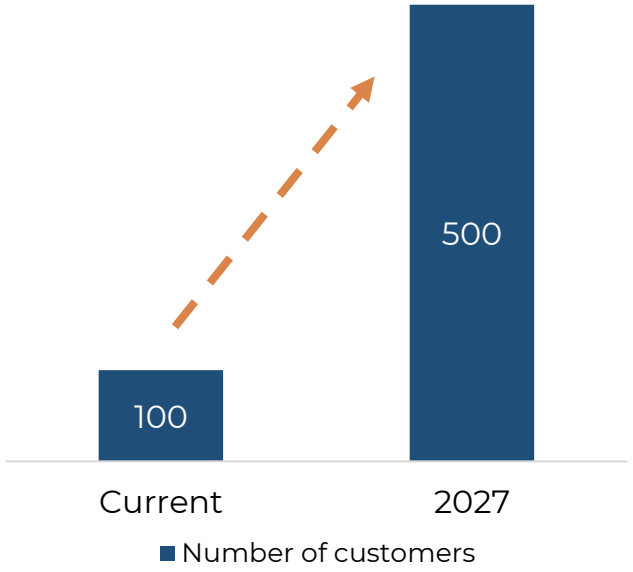
# Addressable Market




Total ~**5000** companies in the potential market across both verticals

- The Digital market consisting of **2700** customer is across the verticals of Big Tech, Ecommerce, Last mile delivery, FinTech, Payments, Mobility, D2C, Gaming, EdTech, etc.
- The Conventional consisting of **2300** customers is of a minimum revenue size of Rs. 1000 Crores across sectors.
- Thus, a total market potential of ***5000 customers** with an average revenue of Rs. 1 Crore per customer.

## NUMBER OF CUSTOMERS




- Current portfolio has **100 customers**
- Our plan is to grow the customer base **by 5x to 500 customers** in 4-5 years with a target funnel of 1000 customers

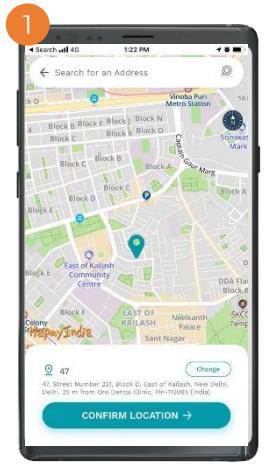
**Source:** Inc42

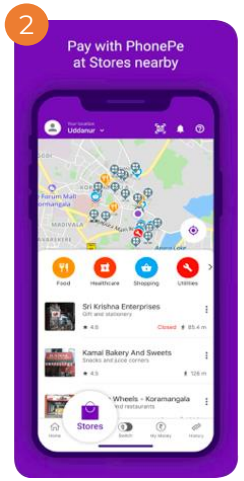
# A Glimpse of some of our Products

## APIs/SDKs

Software used by **software developers and IT/tech teams** in organisations. Below are a few examples:

1. the APIs have been integrated for address capture
2. for hyperlocal discovery of stores
3. to see a street images at a point on a map etc.

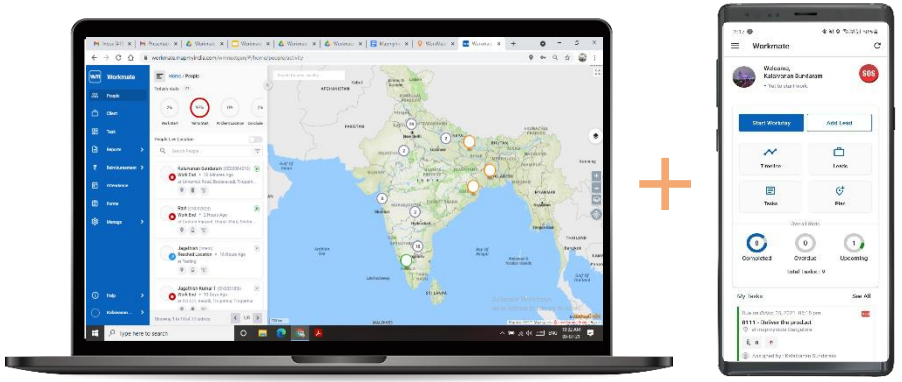
1



2



3

## WorkMate

Software has two components: a **Field user app** on the mobile that is used by the field employee for field tasks + a **manager dashboard** on the web used by the manager to monitoring activity across a set of field users/employees.



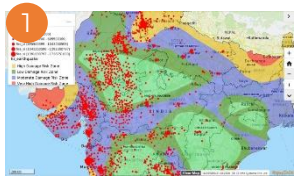
# A Glimpse of some of our Products

## mGIS

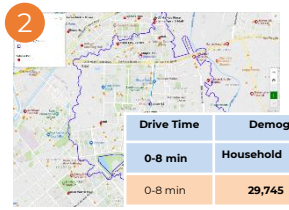
Software used by **research, analytics teams or senior management to drive important decisions** like where to open new stores/network, where to acquire new customers, where to reduce risk/exposure etc. Used by customers have large analytical practices or Business Intelligence teams like multi-national companies, banks, insurers, etc. Few examples below:

1. Insurance risk profiling for an insurer to measure exposure basis flood, seismic, etc patterns
2. Retail store catchment analysis of 8 min drive time from the store
3. FMCG distribution coverage analysis of stockists to identify gaps

1



2

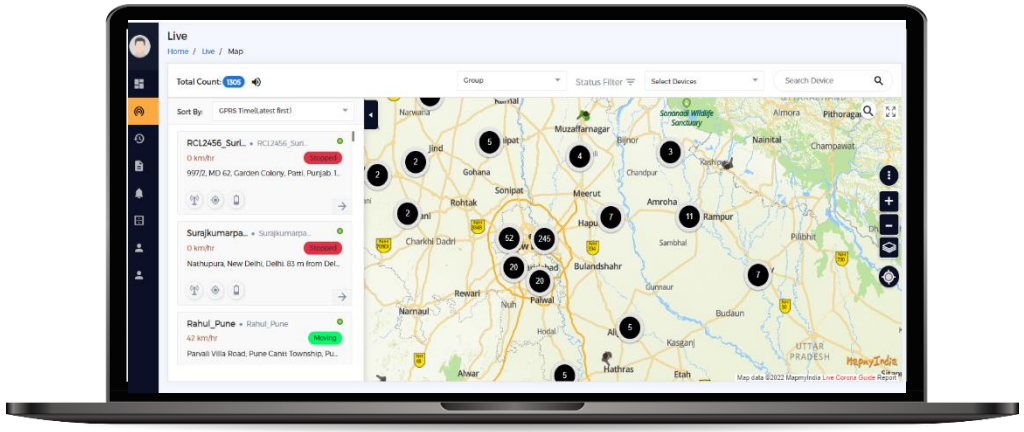


| Drive Time | Demographics | |
|---|---|---|
| 0-8 min | Household | Population |
| 0-8 min | 29,745 | 1,49,729 |

3

## InTouch

Software used by **logistics managers/dept** in a company to monitor movement of goods and vehicles within the company or externally, to customers. Used in industries like logistics, manufacturing, steel, consumer goods, etc



# Right to Win

Products across MaaS, PaaS, SaaS & IoT solutions and not just limited to a map

Wide range of offerings

Quick customisability & Scale

Modular tech to be able to meet specific needs of different customers easily, that has also scaled to extremely large volume needs

Deep sectoral understanding

Sector specific consultative approach to go solve customer problems

Price localisation

To meet customer budget needs with modularity of product

Strong brand recall and momentum

In the B2B market, we have a strong brand and customer's want a reliable source of data and tech.

# Building Geospatial Business

Nikhil Kumar, President – Geospatial Business

# Our Universe - Addressable Govt. Market

| Customer Universe | Customer Requirements |
| --- | --- |
| **Local Government (Urban Local Bodies)**<br>Smart City, Property Tax, Traffic & Transport, Solid Waste, Water & Wastewater, City Gas Urban Road and Pavement | Digital Twin, Property Tax Assessment and Demand generation, Traffic & Transit Management, Solid Waste Management, Network Planning, Operations & Maintenance |
| **State Government (Departments)**<br>Land Records, Police & Security, Disaster Management, Transportation, Food & Civil Supplies, eGov & IT, Tourism, Roads & Bridges | Land Resource Information Management, Crime Analytics, Early Warning System and Risk Reduction Emergency Response, Fleet Management, Digital Transformation |
| **Central Government (Departments, PSUs, National Schemes)**<br>Taxation, Health & Family Welfare, Oil & Gas, Water Resources, Road Transport & Highways, Railways, National Disaster Management Authority, Rural Development, Defence & Intelligence, Internal & Border Security | Tax Analytics, Health Infrastructure Planning, Market Expansion Strategy, Journey Risk Management, Watershed Management, Toll Management, Road Accident Analytics, Risk Mitigation and Alert, Convoy Management, Situational Awareness |

**As majority of these activities are consumed in public welfare initiatives - Govt. becomes core of Geospatial Business**

# Our Portfolio - End to End Geospatial Data & Platform

## Activities in Geospatial Domain

**Acquire & Process**

Capture Real world and Create GIS ready content

**Model, Visualise & Analyse**

Organise Data to drive insights

**Disseminate**

Integrate, Collaborate & Share

## Through Mappls Platform & Products

Maas: **Digital Maps & Twins through our Content** (3D City, Information rich Maps) and **Process** (DraaS) capabilities

SaaS through our Software Products - **mGIS, Insight, InTouch, Workmate, PTMS** (Property Tax Management Software)

PaaS through **Map Engine using Location** APIs, SDKs

**Revenue Models: Annuity, Per API Transactions, Per user, Per vehicle per month**

# Key Use Cases

## A Smart City in North-East India

- Use case-Property Tax Assessment & Demand Notice Generation, Digital Twin
- **Product & Platform:** mGIS, PTMS, MapEngine, DraaS
- **Revenue Model:** 1. Per Asset, 2. Annuity for 5 years

## A State Police Department in South India

- Crime Analytics & Beat Planning, Patrol monitoring
- **Product & Platform:** mGIS, MapEngine, Workmate, Insight
- **Revenue Model:** Annuity per use case for 3 years

## Central govt- Health Ministry of India

- Critical Health Infrastructure Management, Resource planning & Monitoring
- **Product & Platform:** MapEngine
- **Revenue Model:** Per API transaction with Minimum Guarantee for 3 years

## A State Transport Department in South India

- Automatic Vehicle Management & Passenger Safety Information system
- **Product & Platform:** Intouch, Workmate, Locate
- **Revenue Model:** Per vehicle per month for 3 years

# Addressable Market

| Customer Type | Number of Customers /Prospects | Average Ticket Size in Rs Cr | Total Market Potential in 4- 5 Years in Rs Cr |
|---|---|---|---|
| **Local Govt. (Urban Local Bodies)** | **4500** | **1.20** | **6000** |
| **State Govt (Departments)** | **350** | | |
| **Central Government (Departments, PSUs, National Schemes)** | **150** | | |
| **Target Customer Funnel** | **1000** | | |
| **Current customer base of 30** | | **To Grow by 6x** | |

**Source:** Company estimates

## RATIONALE

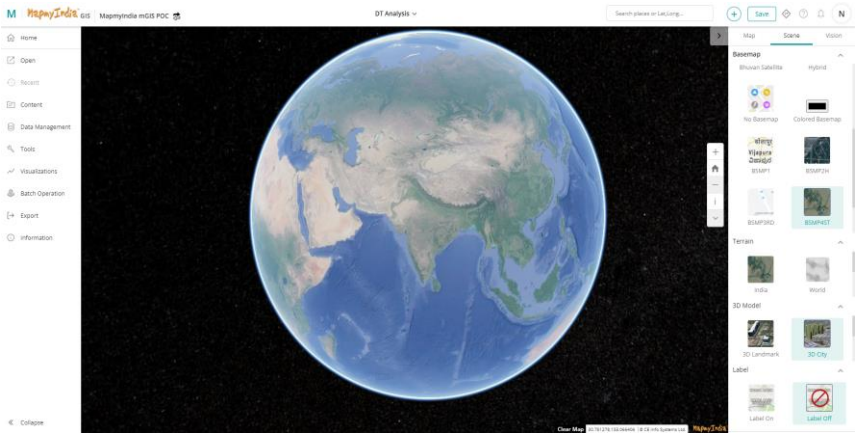
- Geo Adoption in Non-Traditional Sector
- New Geospatial Policy is enhancing contribution value of Geospatial Solutions
- Authorities are showing interest in Digital Twin (3D & Metaverse)
- DraaS Is gaining momentum across sectors
- New Geospatial Guideline envisages the Indian geospatial market to reach Rs 1 Lac Crore by 2030

# Favourable Factors & Broad Strategy

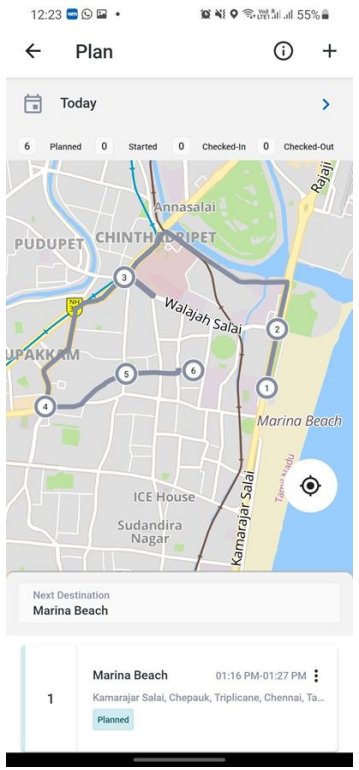
- Leverage Atmanirbhar Bharat - Make in India, IDDM (Indigenously Designed, Developed and Manufactured) preference in Public Procurement
- High Resolution Geospatial data capture, processing, storage and distribution strictly for Indian entities like us which opening up a great opportunity in 3D,4D, HD, Metaverse market
- Extend such new gen product and solution in commercial geospatial market (beyond govt.)
- Leverage our unique position as one stop shop for full Geospatial solutions
- Grow existing Partner & Alliances Ecosystem (VAR, GSI, Tech-OEM )
- Expand and Leverage MoUs with Central and State Governments/PSUs/Universities/NGOs
- Thought Leadership in Industry Associations
- Enhance Reach: Multiple geographies and segments
- Leverage Core competencies around existing solutions & services; build new offerings around Digital Transformation and Drone Tech Digital Imaging (DraaS, LIDAR, 3D/4D data Model etc.)

# A Glimpse of some of our Products

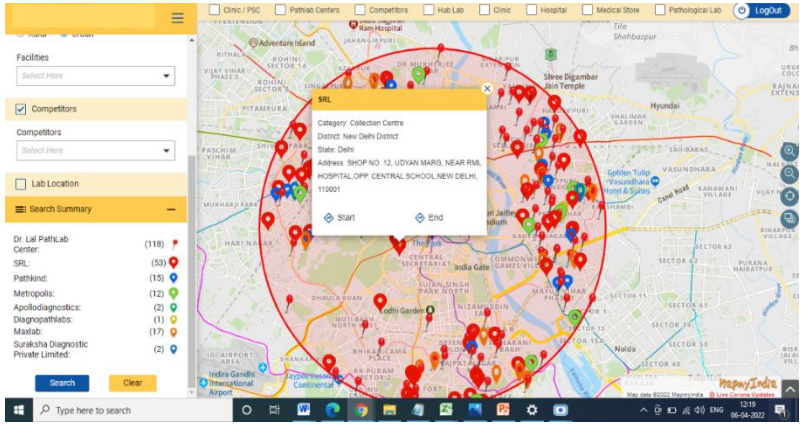
## mGIS



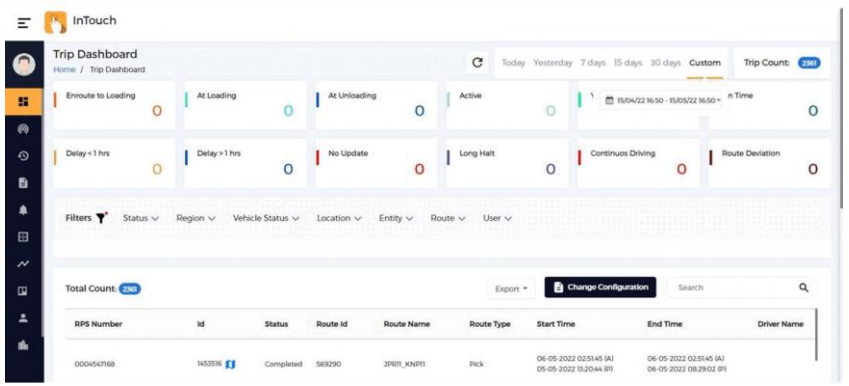
## WorkMate



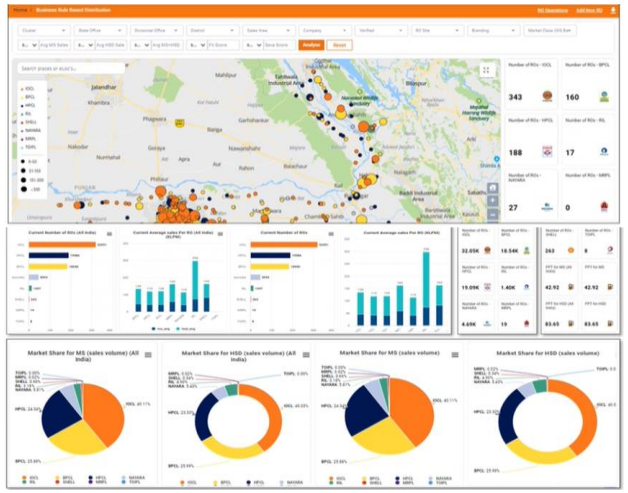

## Map Engine



## InTouch




## Insight

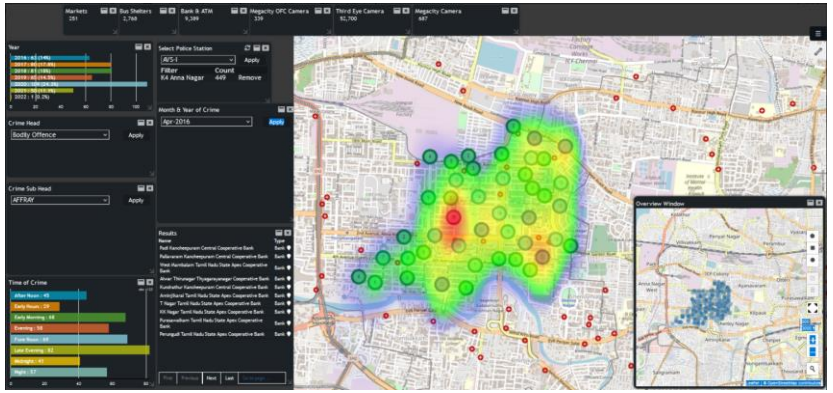


# A Glimpse of some of our Geospatial Outputs

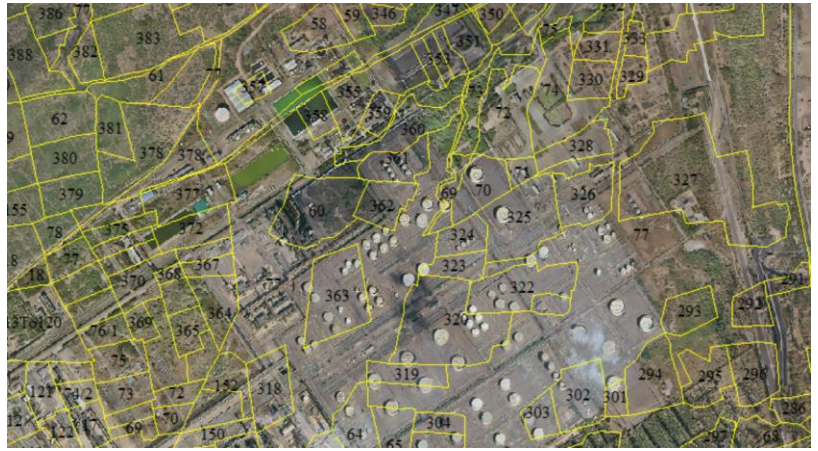
### 3D Model of Gurugram

### Abadi Land Ownership

### City Crime Analytics



### Coverage Map of a Petroleum Energy Plant



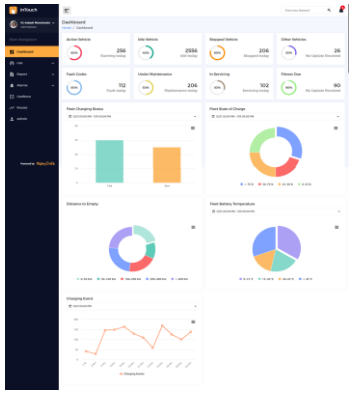
### User Friendly Tourism App

# Capturing the IOT Opportunity

Abhit Kalsotra, Chief Technology Officer, Gtropy (IOT Business)

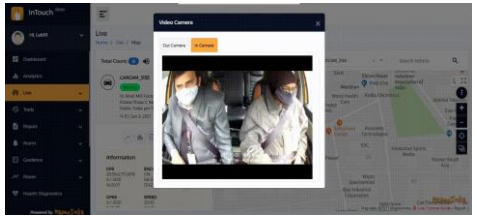
# Our Universe

## IOT Platform

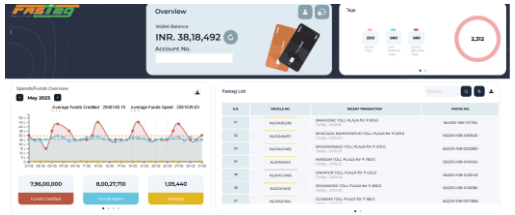


InTouch

Locate



Video Telematics



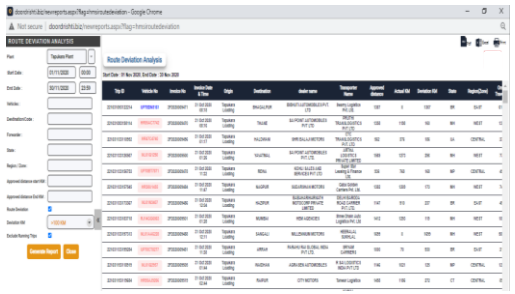
VAS

- **Market:** Segments
  - **B2B/Enterprise**
    - Goods Mobility
      - Fleet and Logistics
    - People Mobility
      - School Bus
      - Taxi and Bus Fleet
  - **B2C/Retail**
    - Genuine Accessories market
    - Aftermarket
- **Products:**
  - Location based analytics platform
  - Value added Services for Transporters
  - Vehicle Telematics
  - Video Telematics
  - Infotainment and connected Car Solutions

# Key Use Cases - Supply chain Solutions for Enterprises

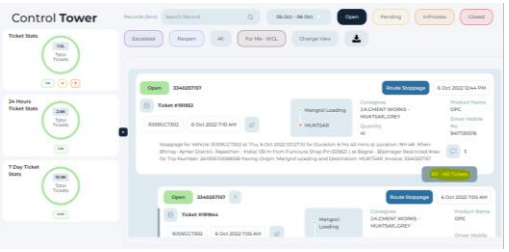
## Leading Cement Manufacturer

- Use of Analytics and algorithms to optimise the cost and increase asset utilisation like identifying bottle necks, Load Planning, delivery locations and accurate detention tracking.
- KPI benchmarking to ensure quick Turnaround time and remove bottlenecks
- **Product:** Locate platform including Hardware
- **Revenue Model:** SaaS - Per Trip or Per vehicle / Month for 3 years

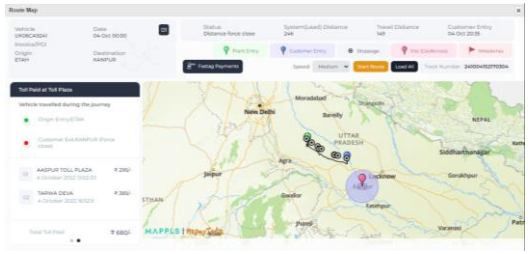


Detailed in-depth Report

Locate Analytics Dashboard




Control Tower Ticketing

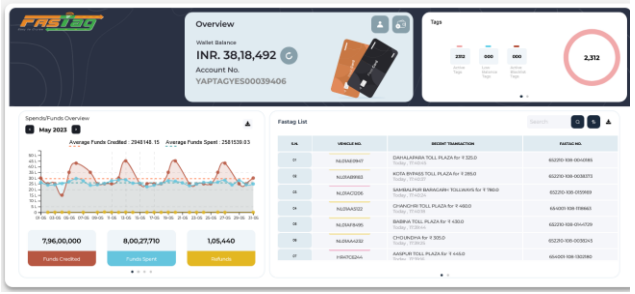


Trip Detailed Analysis

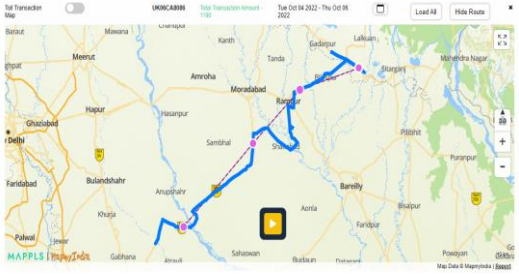
# Key Use Cases - VAS For Logistics

## A Transporter with 50+ Vehicles

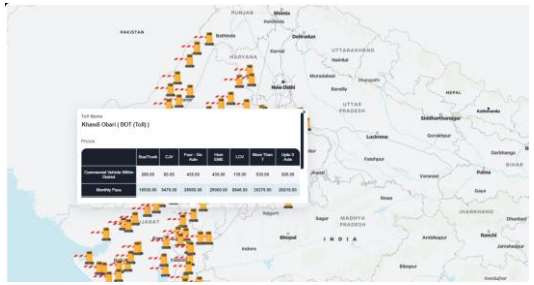
- Toll and Fuel management for fleet operations
  - Wallet based model which frees up working capital per vehicle.
  - Visibility of toll expense on the GPS route for default check
  - AI based reporting of wrongful deductions and auto escalation of the same to the relevant authorities for refund processing
  - Trip based FASTag expenditure calculations to calculate trip profitability
- **Product:** FASTag & Locate platform
- **Revenue Model:** Revenue share per Transaction commission




Toll Management Analytics Dashboard



Toll Track Transaction Summary on Mappls

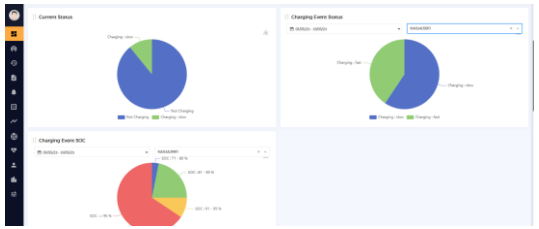


List of Tolls on the Route

# Key Use Cases - EV Fleet Management

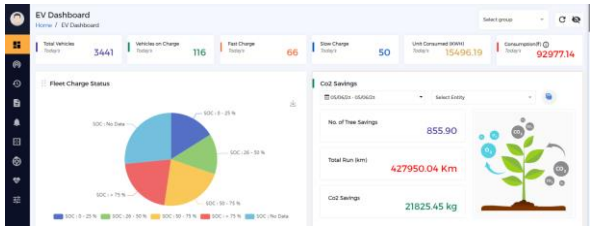
## A Ride Hailing EV Company

- Vehicle & battery health, Visibility and Demand-supply match
- **Product:** Intouch Platform with Hardware
- **Revenue Model:** Per vehicle/month



EV Fleet Summary Dashboard

Fleet wise distance Graph



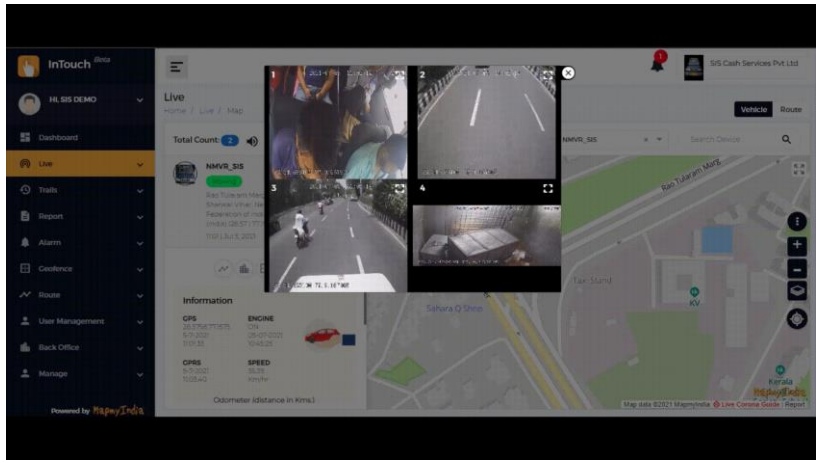

Environment Saving Dashboard

Vehicle Level Details

# Key Use Cases - B2B/Enterprise

## Video Telematics

- A Cash Management & Movement company
- People mobility and high value goods mobility for safety and security solution
- **Product:** Intouch Including Hardware
- **Revenue Model:** Per vehicle per month subscription




Live View for Video Analytics

Hardware

# Key Use Cases - B2C/Retail

## Automotive Genuine Accessories and Aftermarket

- Auto OE Approved Genuine accessories for Showrooms and Dealers in major car Accessories markets across India
- **Products:** Vehicle Telematics, Dashcams & Navigation Systems
- **Revenue:** Per vehicle with 1-3 years subscription

Mappls Gadgets

# Addressable Market

| Category | No of vehicles (Mn) | Potential (No. of Vehicles in Mn) in 2027 |
|---|---|---|
| **Personal (2W & 4W)** | **300** | **8** |
| **Goods Mobility** | **28** | **12** |
| **People Mobility** | **12** | **10** |

**Source**: Vahan, Company estimates

**MapmyIndia has shipped 0.25 Million IoT devices out of total 4 Million estimated market currently**

**We plan to grow volumes by 10x and business by 12x in 4-5 years**

- Increase in data and connectivity helps in increasing penetration of high-end devices and also more analytics
- Regulatory push: increase in regulations and compliance like Mandatory AIS 140, Toll deductions via GPS, video telematics for passenger vehicles etc.
- Increase in data generation on vehicles especially with Evs. The share of electric vehicles in total vehicle sales in India is currently around 5% for 2W and less than 1% for 4W and CV. The government target for EV sales by 2030 is 30% of private cars, 70% for commercial vehicles and 80% for two- and three-wheelers.

# Concluding Remarks

Rohan Verma, Chief Executive Officer & Executive Director

# Future Strategy

### Augment products, platforms and technology lead

- Invest to further develop innovation and technological capabilities
- Build a deeper and broader stack of software products

### Scale and expand our customer reach

- Expansion of relationships with existing active customers
- Leverage first-mover advantage with the GoI's increasing traction

### Drive expansion in International markets and Geospatial sector

- Target international markets with 'Mappls'
- Use integrated maps of 200+ countries

### Explore M&A opportunities to grow business

- Intend to continue pursuing selective strategic acquisitions to enter into new business segments and geographies

### Attract, develop and retain skilled employees

- Expand R&D efforts by recruiting more technical employees
- Formulated ESOP scheme for employees

# Key Inorganic Investments

| Date | Name | Overview | Rationale | Consideration |
|---|---|---|---|---|
| February 2023 | **Indrones Solutions Private Limited** | Company is engaged in the business of manufacturing of the drones, data analytics using high resolution data and developing end to end solution leveraged by drones, IoT and other sensors which helps digitize various sectors including but not limited to agriculture, mining, energy, telecom, infrastructure, construction, disaster management and among others. | To broaden and deepen our addressable market, enabling us to offer comprehensive and differentiated end-to-end offerings to users across a large variety of industry verticals by combining MapmyIndia's suite of digital maps, geospatial software and location-based IoT tech, coupled with Indrones' suite of drones and drone-based solutions and services.<br><br>The investment will also strengthen our ability to leverage cutting-edge drone technologies. | Acquired 20% stake on fully diluted basis for ~Rs. 7 Crores |
| September 2022 | **Kogo Tech Labs Private Limited** | A cutting-edge start-up aiming to build the world's largest travel & hyper-local discovery, recommendations, commerce, social and gamified platform | To build a travel & hyper-local discovery, commerce, social, gamified platform integrated with maps and navigation. | Acquired 26.37% stake on fully diluted basis for Rs. 10 Crore |
| August 2022 | **Nawgati Tech Private Limited** | Company has a video analytics SaaS product focused on the oil and gas sector which monitors the congestion or wait time or traffic at the fuel station. | Exploring synergies in oil and gas segment where applications of their technology can be leveraged by us and help increase the portfolio of offerings to our customers | Acquired 3% stake for Rs. 1 Crore |
| March 2022 | **Gtropy Systems Private Limited** | A Company dedicated to the field of GPS based vehicle tracking solutions and its exhaustive data analytics. It serves varied industries like transportation, schools, rental car services, food & beverage services, telecom, heavy equipment, among others. | This will allow us to augment our GPS tracking capabilities in vehicles. | Acquired 75.98% stake for a consideration of Rs. 13.5 Crores |
| December 2021 | **Pupilmesh Private Limited** | A young, exciting automotive tech and augmented reality metaverse tech company. | This will allow us to bring to market cutting-edge augmented reality-based helmets and heads-up-displays for 2- and 4-wheelers and glasses for professionals, powered by MapmyIndia's maps and technologies | Acquired 9.99% stake for a consideration of Rs. 49.95 lacs. |

# A Glimpse of our Consumer Offerings

## MAPPLS APP

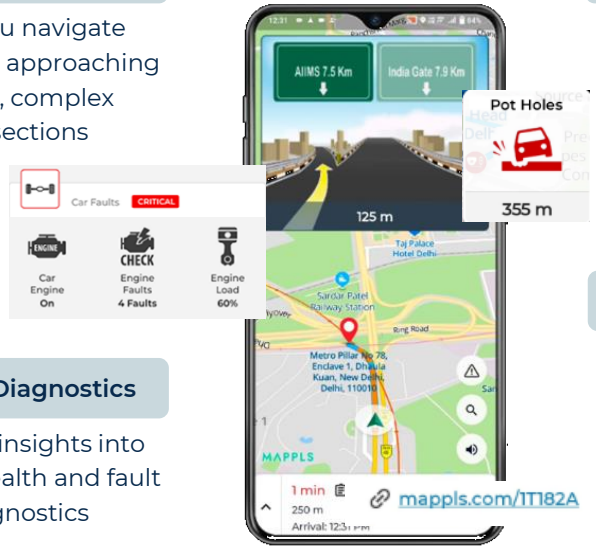
Built a Super App for Maps, Navigation, Safety and more

### Junction View

Helps you navigate safely while approaching flyovers, complex intersections

### Road Safety Features

See reported hyperlocal issues like traffic, road blocks, potholes, unsafe zones




### Doorstep Navigation

Simplified location code for complex addresses providing doorstep navigation

### Vehicle Diagnostics

Enables insights into vehicle health and fault diagnostics

## KOGO APP

A Gamified Social Travel App for users and creators

### Plan, Discover & Share Experiences

Users can plan, discover and share travel itineraries and content and earn KOGOCOIN

Community | Itinerary | Experiences

### Spend KOGOCOIN

Spend KOGOCOIN on hotels, experiences, and travel accessories

Stays | Shop

### Mappls IoT Gadgets

Enables you to track your vehicle and loved ones' in real-time, ensuring their safety

**Deep installed**
With safety features like Panic button and driving behaviour analysis

**Bike Tracker**
Enables live location, speed alerts, geo fencing

**Mappls App and IoT gadgets combined with KOGO App will allow MapmyIndia to offer integrated apps/solutions to consumers, the travel eco-system, businesses & government – opening up travel commerce market opportunity for the company.**

*Notes – To know more, follow these links –* Mappls App | Mappls IoT Gadgets | KOGO

# Disclaimer

This presentation and the accompanying slides (the "Presentation") have been prepared by C.E. Info Systems Limited ("Company") solely for information purposes and to provide background information about the Company and do not constitute an offer to sell or, recommendation or solicitation or invitation of any offer to subscribe for or purchase any securities and nothing contained herein shall form the basis of any contract or commitment whatsoever. This Presentation is strictly confidential and may not be taken away, copied, published, distributed or transmitted or reproduced or redistributed or passed on directly or indirectly to any other person, whether within or outside your organization or firm, or published in whole or in part, for any purpose by recipients directly or indirectly to any other person.

This Presentation is not intended to be a prospectus, an offer letter, offering circular, offering document, information memorandum, statement in lieu of a prospectus, draft red herring prospectus, red herring prospectus, invitation, advertisement or prospectus as defined under the Companies Act, 2013 as amended, the Securities and Exchange Board of India (Issue of Capital and Disclosure Requirements) Regulations, 2018, as amended, or any other applicable law in India.

The information contained in this Presentation should be considered in the context of the circumstances prevailing at the time and has not been, and will not be, updated to reflect material developments which may occur after the date of the Presentation. The information set out herein may be subject to updating, completion, revision, verification and amendment without notice and such information may change materially. This presentation is based on the economic, regulatory, market and other conditions as in effect on the date hereof. It should be understood that subsequent developments may affect the information contained in this presentation, which neither the Company nor its affiliates, advisors or representatives are under an obligation to update, revise or affirm.

You acknowledge and agree that the Company and/or its affiliated companies and/or their respective employees and/or agents have no responsibility or liability (express or implied) whatsoever and howsoever arising (including, without limitation for any claim, proceedings, action, suits, losses, expenses, damages or costs) which may be brought against or suffered by any person as a result of acting in reliance upon the whole or any part of the contents of this Presentation and neither the Company, its affiliated companies nor their respective employees or agents accepts any liability for any error, omission or misstatement, negligent or otherwise, in this Presentation and any liability in respect of the Presentation or any inaccuracy therein or omission therefrom which might otherwise arise is hereby expressly disclaimed.

Certain statements contained in this Presentation may be statements relating to the Company's beliefs, plans and expectations about the future and other forward looking statements that are based on management's current expectations or beliefs as well as a number of assumptions about the Company's operations and factors beyond the Company's control or third party sources and involve known and unknown risks and uncertainties that could cause actual results to differ materially from those contemplated by the relevant forward looking statements. Forward looking statements contained in this Presentation regarding past trends or activities should not be taken as a representation that such trends or activities will continue in the future. There is no obligation to update or revise any forward looking statements, whether as a result of new information, future events or otherwise. You should not place undue reliance on forward looking statements, which speak only as of the date of this Presentation.

Certain data contained in this Presentation was obtained from various external data sources, and neither the Company nor any of its affiliates, advisers or representatives has verified this data with independent sources. Accordingly, the Company and its affiliates, advisers and representatives make no representation as to the fairness, accuracy, correctness or completeness of that data, and this data involves risks and uncertainties and is subject to change based on various factors.

The information contained in this Presentation is not to be taken as any recommendation made by the Company or any other person to enter into any agreement with regard to any investment. You will be solely responsible for your own assessment of the market and the market position of the Company and you will conduct your own analysis and be solely responsible for forming your own view of the potential future performance of the business of the Company.

# Thank You

For further details please contact:

**Saurabh Surendra Somani**
Company Secretary & Compliance Officer, C.E. Info systems Limited

: +91 11 4600 9900
: cs@mapmyindia.com; investor.relations@mapmyindia.com

**Diwakar Pingle/Sonia Keswani/ Shashank Ganesh**
Ernst & Young LLP

: +91 22 6192 0000
: Diwakar.pingle@in.ey.com
Sonia.keswani@in.ey.com
Shashank.ganesh@in.ey.com

MAPPLS
MapmyIndia

**Corporate Office**
First, Second, & Third Floor,
Plot. No. 237, Okhla Industrial Estate, Phase-III, New Delhi 110 020, India
www.mapmyindia.com