

Date : 03.05.2025

To, BSE Limited Phiroze Jeejeebhoy Towers, Dalal Street, Fort, Mumbai – 400 001. BSE Scrip Code: 543945	To, The National Stock Exchange of India Limited “Exchange Plaza”, Bandra – Kurla Complex, Bandra (EAST), Mumbai – 400 051 NSE SYMBOL: NETWEB
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**Sub: STRATEGY PRESENTATION ON THE QUARTERLY AND YEARLY AUDITED FINANCIAL RESULTS**

Dear Sir/ Madam,

Please find enclosed herewith the strategy Presentation on the audited Financial results for the quarter and the year ended on March 31, 2025

Kindly take the same on record.

**Thanking you,****For Netweb Technologies India Limited**

Lohit

Chhabra

Digitally signed by Lohit  
Chhabra  
Date: 2025.05.03  
17:49:34 +05'30'

Lohit Chhabra

Company Secretary &amp; Compliance Officer

M.NO A36610

**Netweb Technologies India Limited****Plot No. H-1, Block-H, Pocket No. 9, Faridabad Industrial Town, Sector-57, Faridabad,  
Haryana 121004****Tel. No. : +91-129-2310400****Website : [www.netwebindia.com](http://www.netwebindia.com); E-mail : [complianceofficer@netwebindia.com](mailto:complianceofficer@netwebindia.com)**



# NETWEB TECHNOLOGIES INDIA LTD

India's Leading High-end Computing  
Solutions (HCS) Provider

FY 25 - Strategy Presentation

**May 2025**





# AGENDA



**About Netweb Technologies**



**Key Investment Highlights**



**Growth Drivers**



**Annexure**



# ABOUT NETWEB TECHNOLOGIES

India's leading Indian origin, owned and controlled OEM in the space of High-end Computing Solutions (HCS)

**Netweb**  
TECHNOLOGIES



## Business Tailwinds ►►

'Make in India' Policy & 'PLI Scheme' of the GOI

'Make AI in India & Make AI work for India' initiative of the GOI

Indigenous LLMs fueling AI demand

Increased supercomputing adoption across verticals

Explosion of on-prem cloud infra across large enterprises and high data center demand in India

GOI's approval of over ₹1,03,000 Mn for the IndiaAI Mission<sup>1</sup> to catalyze India's AI ecosystem

**500+**

Supercomputing systems installed

**5000+**

Accelerator / GPU based AI systems & enterprise workstations

**50+**

Private cloud & HCI installations

**03**

Supercomputers listed 14 times in the world's top 500 supercomputers

## FY25 FINANCIAL METRICS



**Revenue from Operation: ₹ 11,490.2 Million**  
Customers: Govt. (50.6%) vs Non-Govt. (49.4%)



**Op EBITDA Margin: 13.9%**



**PAT Margin: 9.9%**



**ROCE: 32.6%**



**ROE: 24.0%**



# KEY MILESTONES

**Netweb**  
TECHNOLOGIES



**1999** ESTABLISHED

**2004**

**KABRU - IMS CHENNAI**  
Was, then, one of the top 500 most powerful supercomputing systems in the world

**2013**

**PARAM YUVA II- CDAC PUNE**  
69<sup>TH</sup> World's Most Powerful supercomputer at the time of commissioning

**2017**

Deployment servers as part of surveillance project at 204 locations across 23 states for a public sector undertaking

**2018**

Awarded **Intel Technology Provider Platinum 2018**  
Best HPC Data Center Specialist

**2019**

Deployed **PARAM Ambar** at ISRO - India's 4<sup>th</sup> Fastest Supercomputer at the time of commissioning

**2022**

Qualified for PLI - Telecom and Networking Product  
Deployed 5G cloud for International telecom service provider  
Launched container platform Kubyts enabling rapid deployment of AI & HPC

**2021**

Qualified for PLI Scheme of GOI for **IT Hardware**  
Outstanding Contribution in **Promotion of electronics & manufacturing of servers** from MEITY

**2020**

Received Orders for Tyrone HPC Storage, Capacity 10500 Terabyte from R&D Organization of MEITY, GOI

**2023**

Deployed **AIRAWAT** - India's Largest and Fastest AI Supercomputing System & Ranked 75<sup>th</sup> in the world  
Foraying into Network Switches & 5G ORAN

**2025**

Received claim under the Production linked Incentive Scheme 2.0 for I.T Hardware

**2024**

Commissioned India's flagship end-to-end high-end computing server, storage and switch manufacturing facility

**2023**

Manufacturing Partnership with NVIDIA:  
For NVIDIA Grace CPU Superchip & GH200 Grace Hopper Superchip MGX server designs

**2023**

Netweb Listing:  
Listed on 27<sup>th</sup> July 2023 on BSE & NSE

Deployed Indian Space Organization's fastest Supercomputing system at VSSC, Trivandrum



# SNAPSHOT OF OUR HCS OFFERINGS

India's leading HCS provider with fully integrated design and manufacturing capabilities





# SNAPSHOT OF OUR HCS OFFERINGS (2/2)

High-End Computing Solutions (HCS) Offerings Suite

**Netweb**  
TECHNOLOGIES



High Performance  
Computing (HPC) Systems

**TCM**



Make your HPC Cluster  
Reliable, Agile, and Responsive



Private cloud and  
hyperconverged  
infrastructure (HCI)

**Skylus**



Setup a Private Cloud Quickly  
and Accelerate your Cloud First  
Strategy



AI systems and  
Enterprise workstations

**KUBYTS**

**Skylus.ai**



Accelerate your AI Enterprise  
workloads efficiently with  
Tyrone AI Systems & Enterprise  
workstation



High performance  
storage (HPS)  
solutions

Unified Storage  
**Tyrone VERTA**



Unified Block  
**opslag™ UB**  
Archival & surveillance  
**COLLECTIVO®**



Parallel File System  
**ParallelStor**



Data Centre servers

**CAMARERO**



Reimagine your Data Center  
strategies for running modern  
workload



# NETWEB'S DIVERSIFIED APPLICATION INDUSTRY BASE

Netweb  
TECHNOLOGIES

Catering to the end-to-end needs of customers that enable the company to attract new customers and diversify its customer base



भारतीय प्रौद्योगिकी संस्थान हैदराबाद



TOWER  
RESEARCH CAPITAL



GRAVITON  
RESEARCH CAPITAL LLP



रक्षा मंत्रालय  
MINISTRY OF  
DEFENCE



tata institute  
of fundamental  
research



Securities  
Research



accenture



TATA  
CONSULTANCY  
SERVICES



SOCIETE  
GENERALE



Government & Defense

Educational Institutes

BFSI Clients

Other Enterprises\*

\*Other enterprises includes IT&ITeS, media & entertainment, telecom, cloud services etc. |



# HIGH PERFORMANCE COMPUTING (HPC)

India's largest manufacturer of Supercomputing systems

Netweb  
TECHNOLOGIES

Designed, Developed & Deployed some of India's most powerful Supercomputing systems



AIRAWAT

PARAM  
Ambar

PARAM  
YUVA-II

PARAM YUVA-II is one of the India's fastest and largest hybrid supercomputer

## HPC Systems Overview

- In terms of the number of HPC installations, Netweb is **one of the most significant OEMs in India** amongst others\*
- Equipped with **'Tyrone' cluster management suite**
- Deployed diverse Supercomputing systems ranging from **10 nodes to 400 nodes & scalable up to 1,000 nodes**, to cater to different customers' requirements
- 500+ HPC Installations** to various government institutions and private enterprises such as IITs, JNU, NMDC Data Centre, etc

## Segmental Revenue Trend (INR Mn)

Revenue  
Share^

42%

39%

36%

35%

1,030

FY22

1,728

FY23

2,624

FY24

4,055

FY25

CAGR 57.90%

## Indian HPC Market (\$Mn)\*

CAGR : 9.3%

413

FY20

CAGR : 9.3%

644

FY25E

919

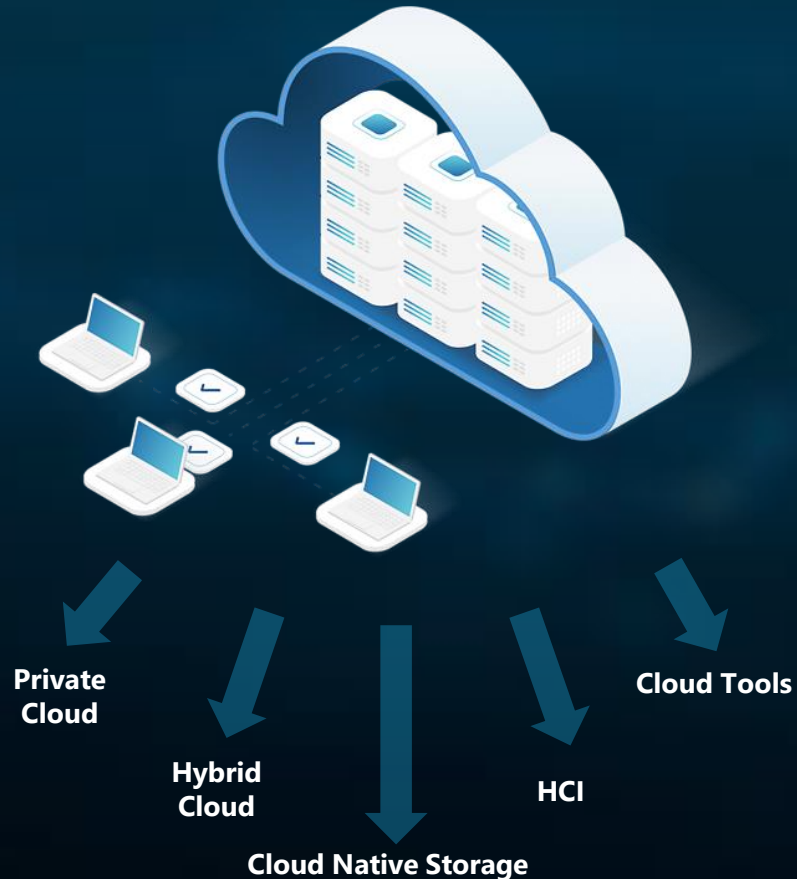
2029F



# PRIVATE CLOUD AND HYPERCONVERGED INFRASTRUCTURE (HCI)

Offers hyper-converged capabilities i.e. combining compute, storage, and network

The company's private cloud & HCI offering is built and sold under our Tyrone Skylus brand



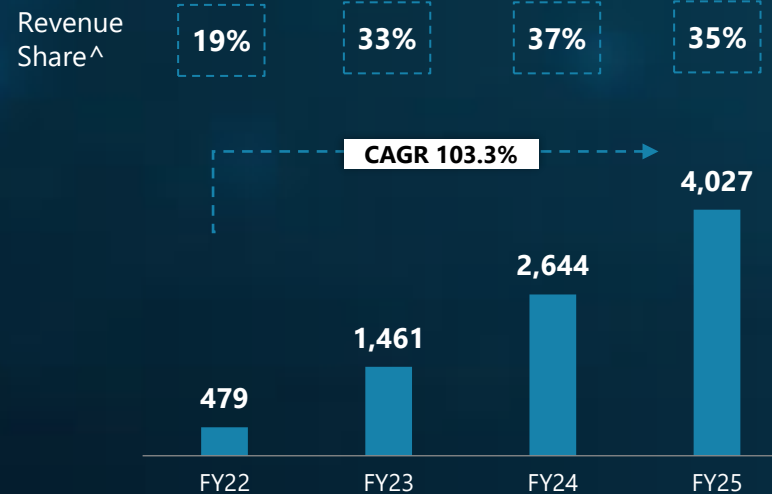
## Private Cloud & HCI Overview

Provide a bespoke **hardware and curated software stack**

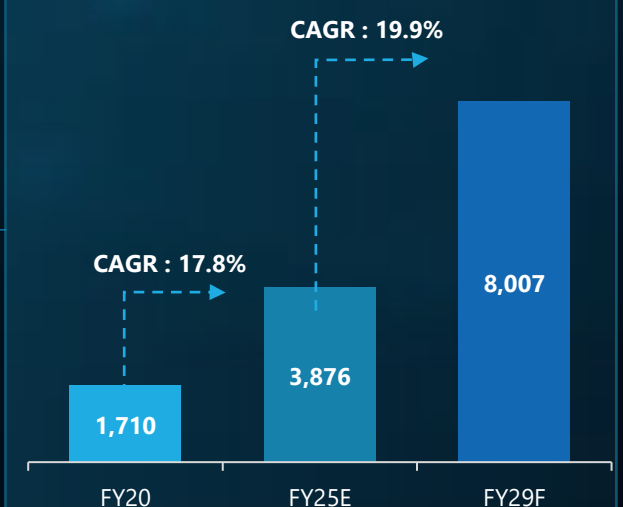
Tyrone Skylus has enabled the company to **compete with foreign HCI OEMs**, virtualization ISVs, private cloud platforms, and general computing rigs

Installations of **50+ private cloud and HCI** to marquee customers such as Graviton, Akamai, A.P.T. Portfolio, and Yotta Data.

### Segmental Revenue Trend (INR Mn)



### Indian Private Cloud & HCI Market (\$Mn)\*

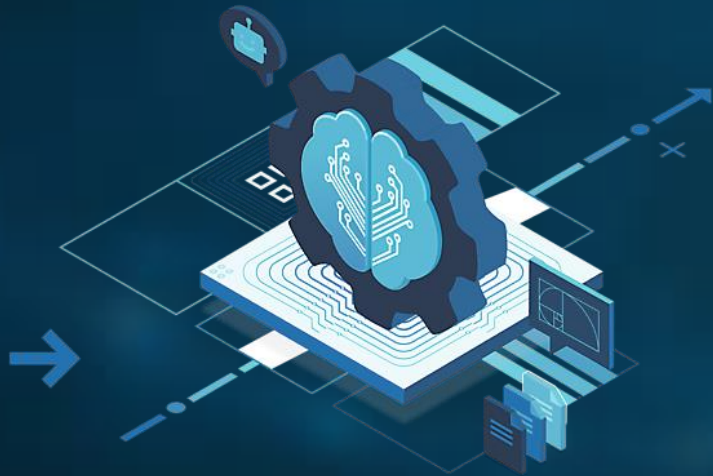




# AI SYSTEMS AND ENTERPRISE WORKSTATIONS (AI & EW)

Address requirements of Supercomputing systems, ML- DL workloads, LLMs-SLMs and visualization applications

The company's AI Systems & workstations are designed to support wide range of applications such as



ML - DL

LLM, SLM

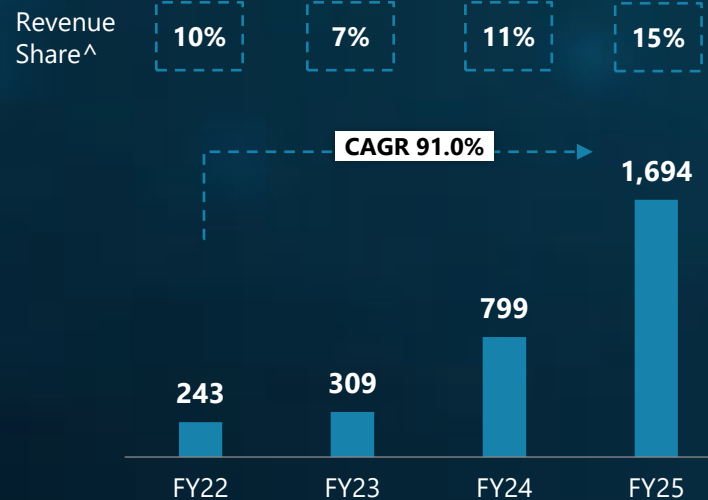
Generative AI

CFD & CMD

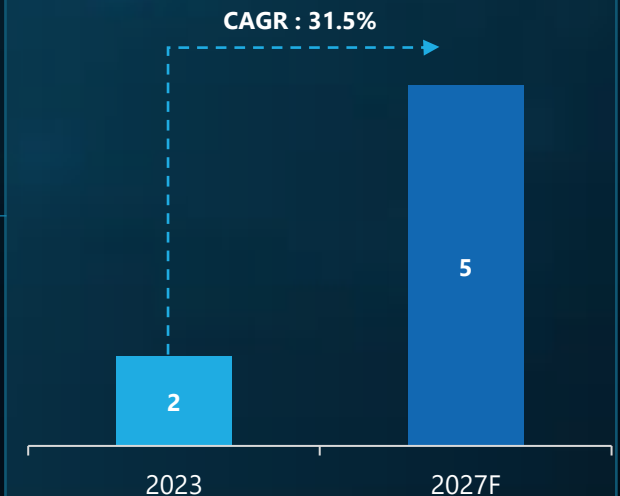
## AI Systems & Enterprise Workstations Overview

- Equipped with **proprietary AI suites** viz., **Tyrone Kubyts & Skylus.ai**, targeted to automate **AI workload provisioning, GPU resource management, & application orchestration**
- Designed and developed a wide range of **AI GPU systems & workstation models** to provide flexibility for computational power needs of variety of workloads. The range starts with single GPU and goes upto eight GPU system designs
- Undertaken installations of **over 5,000 accelerator / GPU-based** AI systems and enterprise workstations for marquee customers such as DRDO, Space Application Centers, IIIT Delhi, IIT Jammu, IIT Kanpur, IIIT Naya Raipur, JNU, HL Mando, Hemvati University, and Airmatrix.

### Segmental Revenue Trend (INR Mn)



### AI Spending in India, US\$ Bn





# HIGH PERFORMANCE STORAGE (HPS/ENTERPRISE STORAGE) SOLUTIONS

HPS Solutions provide high throughput and high IOPs<sup>#</sup> storage for enterprise computation users

The company's hardware, software have been developed in-house and are compliant with the 'Make in India' policy\*.

Its HPS Solutions comprise:



Unified storage solution  
(Tyrone Verta)



Parallel file system storage  
(Tyrone ParallelStor)



Cloud native storage  
(Tyrone Collectivo)

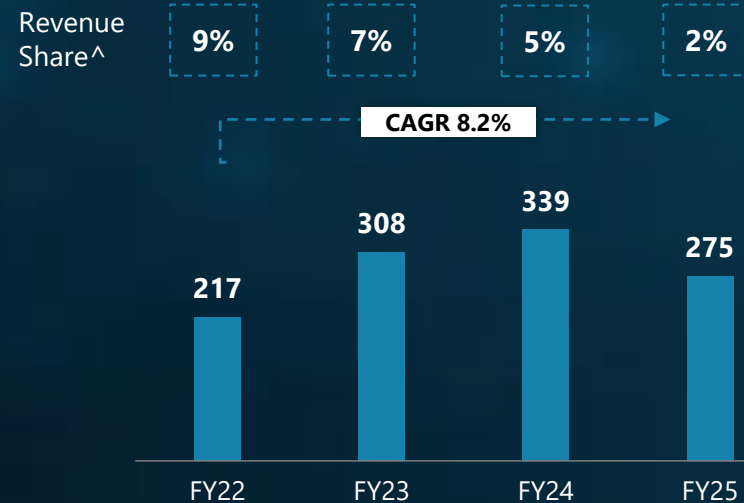


Surveillance and object storage  
(Tyrone Collectivo with Fluid Input Output)

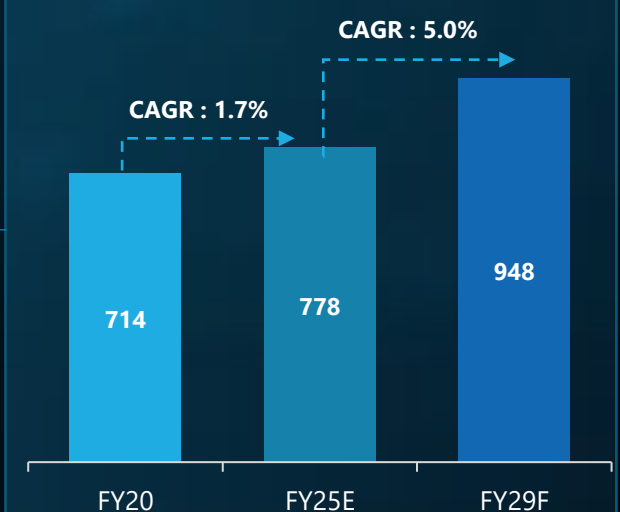
## HPS Solutions Overview

- Capable of being **integrated into private & public cloud environments**
- Salient features of HPS solutions are **no single point of failure, scalable upto Exabytes, and built-in high availability**
- Facilitate **10 mn IOPs<sup>#</sup> & 100 GBps (scalable upto 450GBps)** throughput & designs that can be extended up to **1,000 petabytes**
- Provide HPS solutions to **marquee Customers** including Graviton, A.P.T. Portfolio, and INST.

## Segmental Revenue Trend (INR Mn)



## Indian Enterprise Storage Market (\$Mn)\*



\*Source: F&S Report; <sup>#</sup>Input/output operations per second; <sup>^</sup>% share of FY23 revenue from operation excludes other operating revenue



# DATA CENTRE SERVER

Designing and Manufacturing servers to cater to disparate customer needs from entry-level servers to high-end 'mission-critical' servers

The company's current server models are typically designed and built with the dual processor configuration that enables multiple operations simultaneously, leading to low latency & better physical space utilization.



1U Server



2U Server



All-Flash NVME



4U 8 Node Server



GPU Server

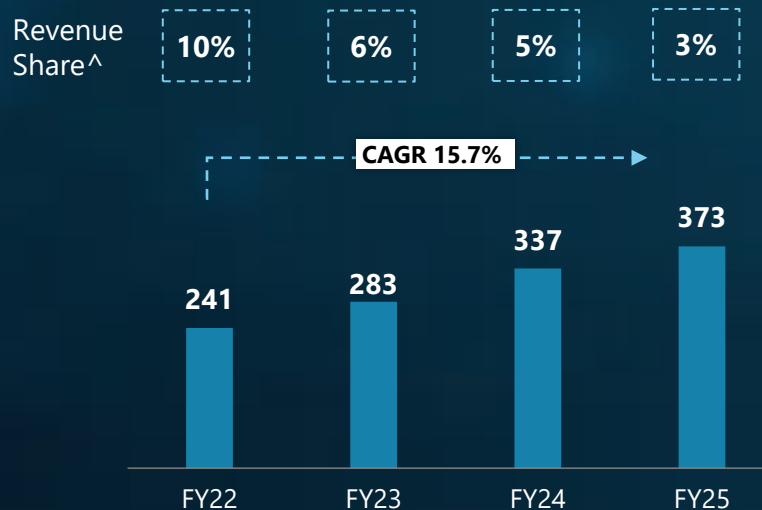


Storage Server

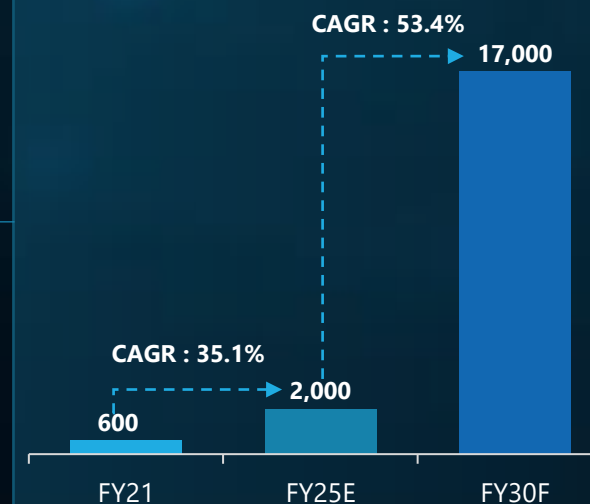
## Data Centre Server Overview

- Designed and built **over 200 dual-processor server models** under the brand “**Tyrone Camarero**”
- Improving and customizing offerings to address specific requirements such as - **Low Rack Space Consumption, High in-built storage capability (up to 1petabyte ( $10^{15}$ )), High Energy Efficiency** etc.
- Design and manufacture servers **in compliance with the 'Make in India'** policy
- Provide data center servers to **marquee Customers** including JNU, HL Mando, etc.

## Segmental Revenue Trend (INR Mn)



## Indian Data Centre Capacity (in Megawatts)\*





# SOFTWARE & SERVICE FOR HCS

Providing private cloud software stack – Both on-premises and off-premises

The company's cloud solutions comprise deployment services which include



Designing

Application  
Migration

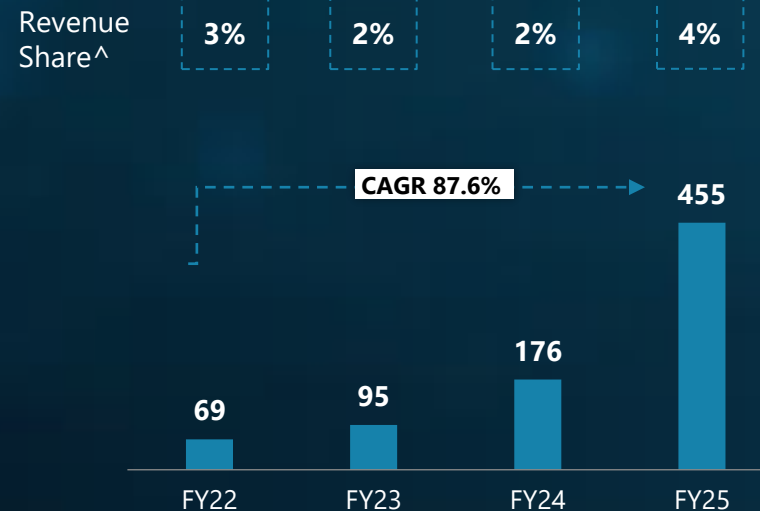
Virtual  
Machine  
Migration

Application  
Porting  
Services

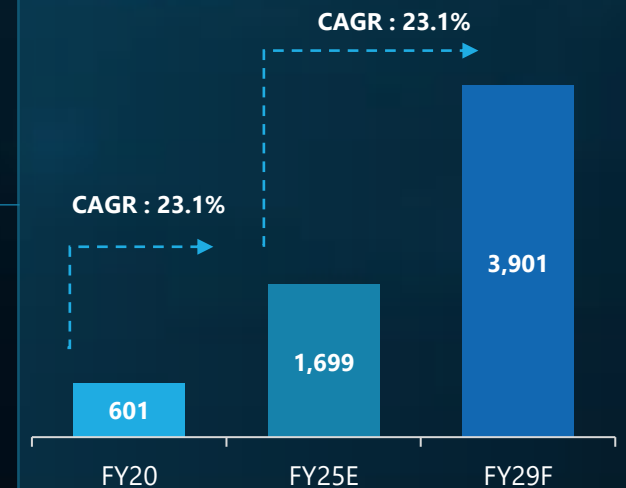
## Software & Service for HCS Overview

- ❑ **Private cloud software stack** to handle **complex workloads** (including 5G enterprise cloud, Virtualization needs, private 5G, and enterprise IT)
- ❑ Provide '**Big Data**' **centric solutions** that are designed to cater to data-intensive distributed applications under a single umbrella
- ❑ 'Big Data' centric solutions use **Tyrone Camarero dense systems, Tyrone Cluster Management Suite, and Tyrone Collectivo** range of specialized storage systems
- ❑ Provide software and services for HCS to **marquee Customers** including NMDC Data Centre and Graviton.

## Segmental Revenue Trend (INR Mn)



## Indian Cloud Managed Services Market (\$Mn)\*





# COMPETITOR LANDSCAPE

One of the few players in India who offers a full stack of product and solution suite with comprehensive capabilities in designing, developing, implementing, and integrating high end computing solutions

Products and Solutions	Netweb Technologies	IBM Lenovo	DELL	Hewlett Packard Enterprise	ATOS	NetApp Hitachi Data Systems	Red Hat Nutanix	Vmware Suse	HCL Cognizant	Accenture Tech Mahindra
HPC	✓	✓	●	✓	✓	●	●	●	●	●
Data Centre Server	✓	✓	✓	✓	●	●	●	●	●	●
Enterprise Storage Systems	✓	●	✓	✓	●	✓	●	●	●	●
Private Cloud and HCI	✓	●	●	●	●	●	✓	✓	●	●
AI Systems & Enterprise Workstation	✓	●	●	●	●	●	●	●	●	●
Cloud Managed Services	✓	●	●	●	●	●	●	●	✓	✓



# KEY INVESTMENT HIGHLIGHTS

1



India's leading Indian origin owned and controlled OEM for HCS with integrated design and manufacturing capabilities

4



Long standing relationship with a marquee and diverse customer base

2



Operates in a rapidly evolving and technologically advanced industry with high entry barriers

5



Track record of financial performance and consistent growth

3



Significant product development and innovation through R&D

6



Experienced Board & Senior Management Team



# 1. INDIA'S LEADING INDIAN ORIGIN OWNED AND CONTROLLED OEM FOR HCS

with integrated design and manufacturing capabilities (1/2)

Full stack of product and solution suite with comprehensive capabilities in designing, developing, implementing and integrating HPC solutions

Deep Expertise in System Design & Architecture



Pre-compiled application stack

End user utilities

Proprietary middleware solutions



Proprietary designs are cloud native



Proprietary designs are capable of catering to the evolving needs of Customers

Providing End-to-End Solutions with Fully Integrated Design & Manufacturing Capabilities, now compliant with Make in India policy



## Design

Design proprietary hardware, middleware stack and related software solutions



## Manufacture

Manufacturing facility capable of producing 200+ server models, 50+ workstation models & 15+ storage systems



## Deployment

Deploy supercomputing infrastructure to meet the rising computational demands of customers



# 1. INDIA'S LEADING INDIAN ORIGIN OWNED AND CONTROLLED OEM FOR HCS

with integrated design and manufacturing capabilities (2/2)

## End-to-End Designing & Production of Make-in-India Server



In-house Expert Design Team



Advance Technology Integration



Quality Control Measures



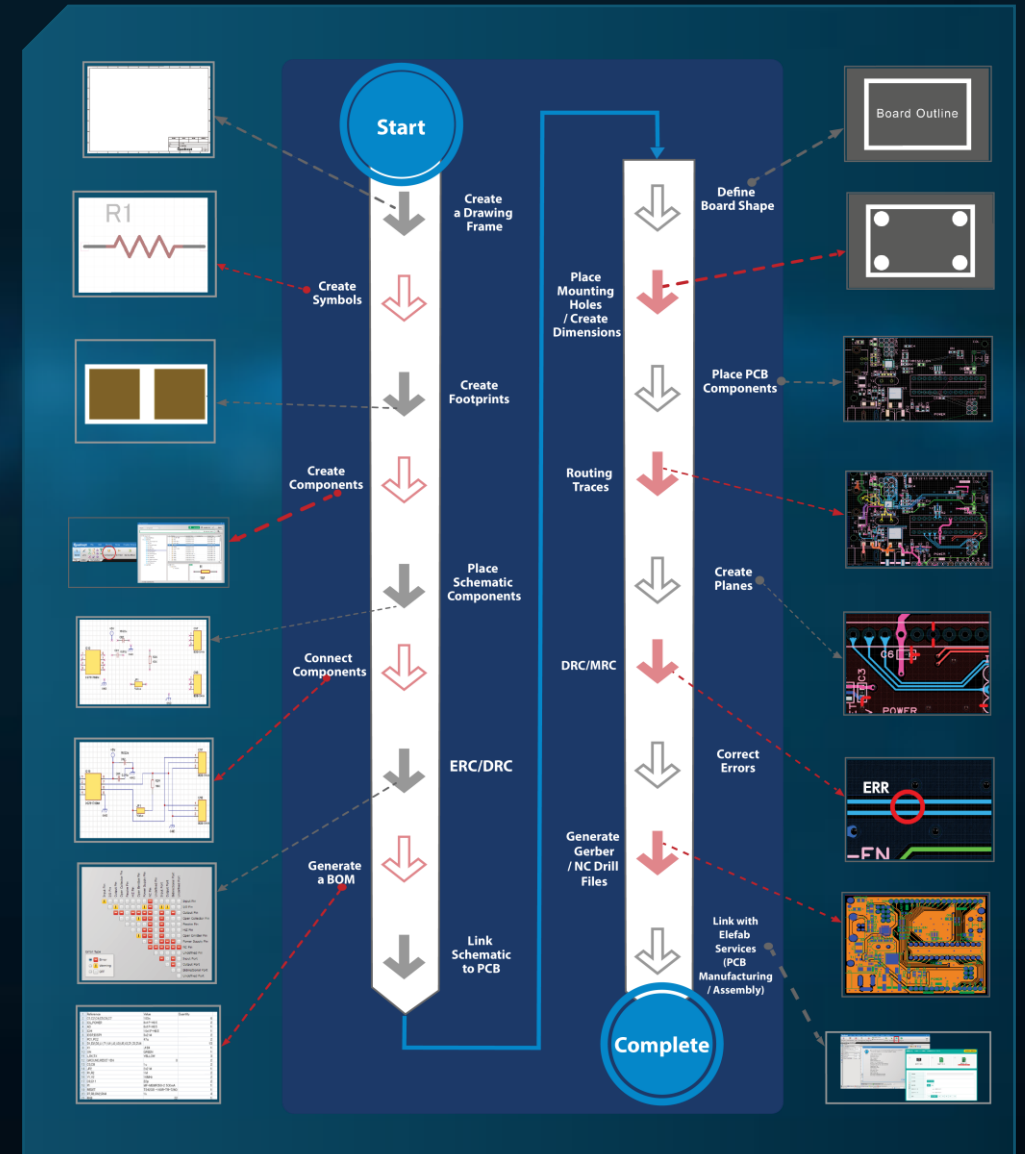
Very Low Failure Rate



Scalable Production Capacity



25 Years of Expertise in the Domain





## 2. OPERATES IN A RAPIDLY EVOLVING AND TECHNOLOGICALLY ADVANCED INDUSTRY WITH HIGH ENTRY BARRIERS

Experience of installing 500+ HPC systems, 50+ private cloud & HCI, 5000+ accelerator/GPU based AI systems & enterprise workstations

### Experience gained in evolving projects

1

Setting up AI & deep learning labs at govt. institute, forensic workstation at GOI dept & Big Data computing lab at a govt. institute

2

Installations of High-Performance Storage solution for a Fintech Company to deliver 450GBps throughput

3

Developing and building Supercomputing systems such as AIRAWAT, Agastya, PARAM Ambar, PARAM YUVA-II and Kabru

### Our Capabilities

#### Continuous R&D in



Manufacturing servers



Supercomputing systems



Containerized Application Solution

#### Technical Skillset



Kernel level design



Hardware product designs



Fine-tuned PCB layouts



Mix workload capabilities



Dense architectures



Repository of HPC-AI codes

### Industry Entry Barriers



#### Rapidity of technological advancement necessitates:

- Hardware, Middleware & Application-level Innovation
- Application Optimization
- Track Record of Customer Service
- Fine tuning of Architectures



#### Modification of designs and changes in implementation requires

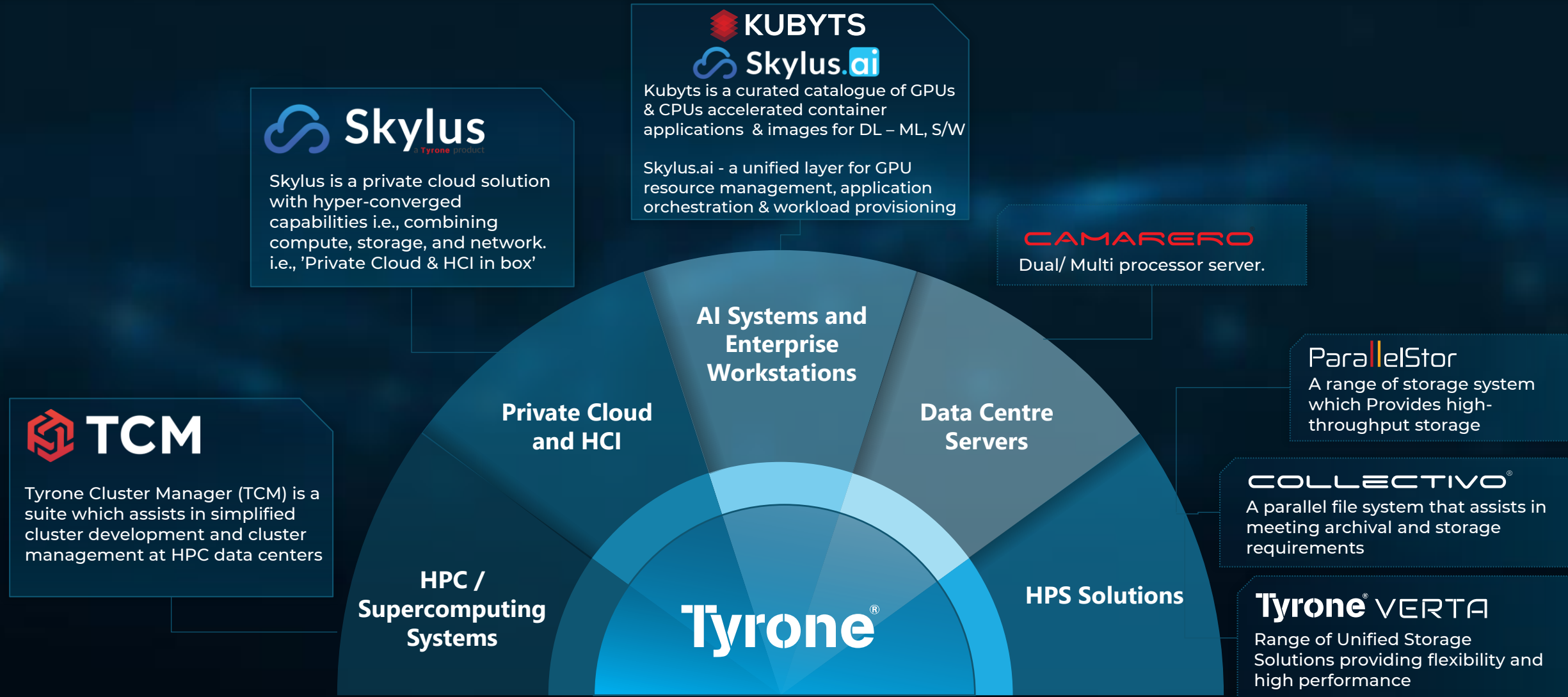
- Deep Expertise in system design & architecture
- Expertise in Hardware & middleware
- Exposure to large problem sets
- Technical skill set & expertise



### 3. SIGNIFICANT PRODUCT DEVELOPMENT AND INNOVATION THROUGH R&D

Independently design and innovate products and solutions offerings and provide services tailored to specific customer requirements

The company's R&D Facilities has enabled it to increase its product lines across different HCS offerings





# 4. LONG STANDING RELATIONSHIP WITH A MARQUEE AND DIVERSE CUSTOMER BASE

## Diverse Customer Base

### Higher education and Research



### IT & ITES



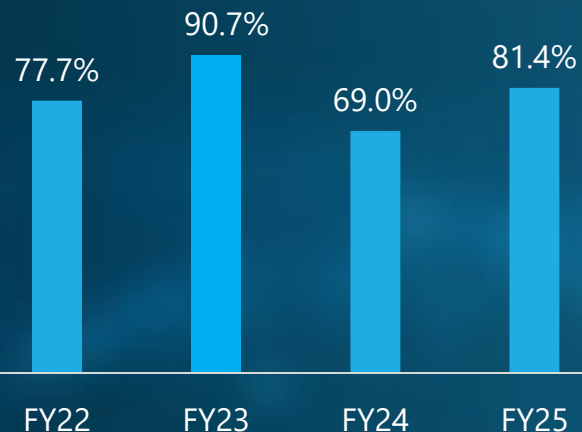
### Space & Defence



### Others



## Revenue^ from Repeat Customers



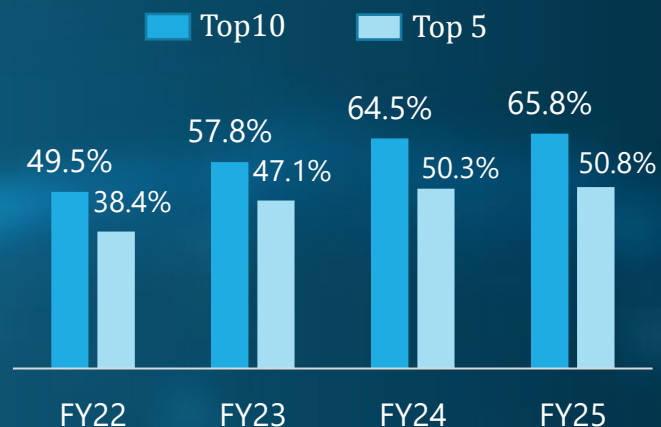
308

Repeat Customers (FY25)  
Associated for over **5.6**  
years using Fiscal 2016 as  
the base

4.8  
yrs

Average top 10 customer  
age (FY25) using Fiscal  
2016 as base

## Customer Concentration^



9.79%

Customer  
Accretion CAGR\*

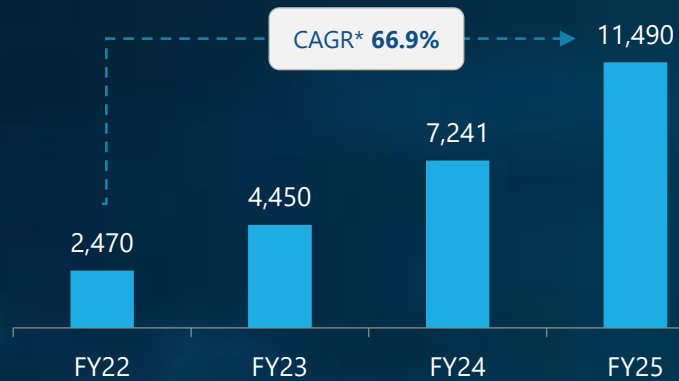
147

New clients onboarded  
across diverse  
industries in FY25

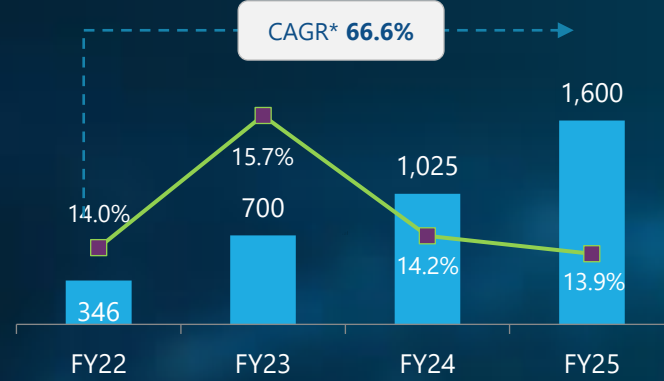


# 5. TRACK RECORD OF FINANCIAL PERFORMANCE AND CONSISTENT GROWTH

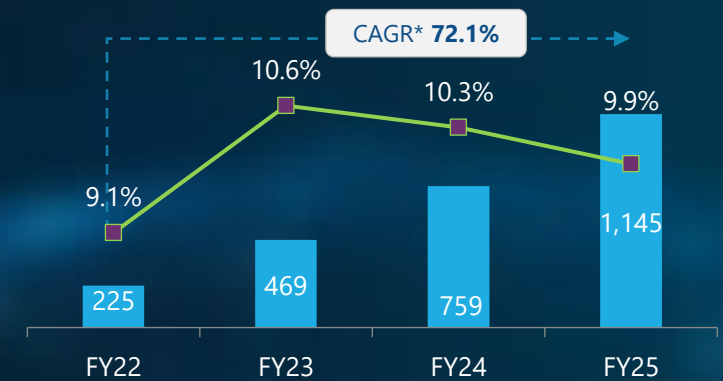
Operating Income (INR Mns)



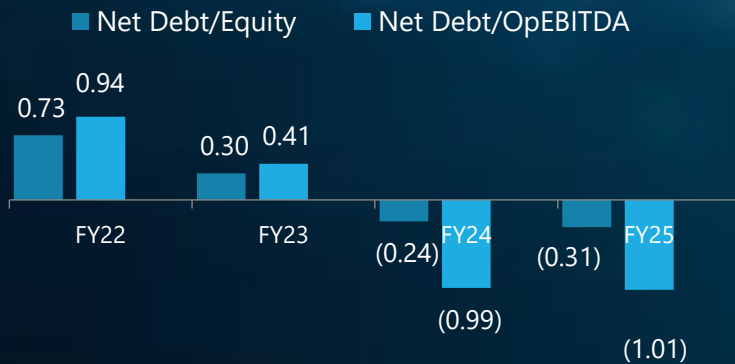
Op EBITDA (INR Mns & % Margin)



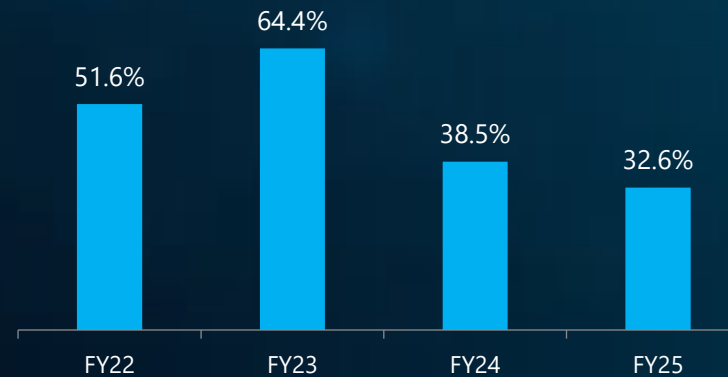
PAT (INR Mns & % Margin)



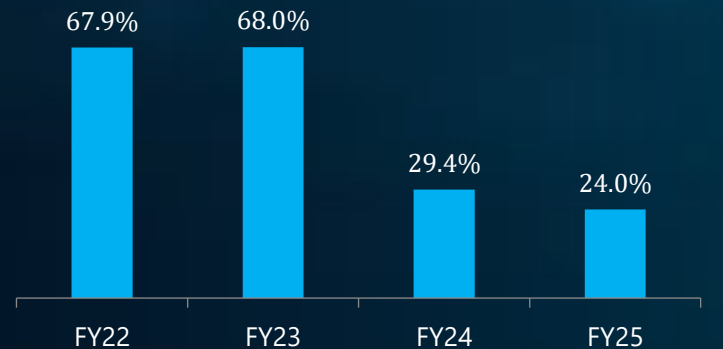
Net Debt Ratios



ROCE<sup>2</sup>



ROE<sup>2</sup>





## 6. EXPERIENCED BOARD AND SENIOR MANAGEMENT TEAM (1/2)

### Board of Directors



**Sanjay Lodha**  
*Chairman and Managing Director*

- Founded Netweb Technologies in 1996 which was acquired by our Company in August 2016
- Been on Board of Advisors for Intel for the year 2020 and 2022
- BA (hons) in economics & PG diploma in business management



**Navin Lodha**  
*Whole Time Director*

- Leads West Zone of company's sales and Marketing Dept
- 15 + years of experience in sales and marketing
- Holds bachelors degree in commerce



**Vivek Lodha**  
*Whole Time Director*

- Leads East Zone of company's sales and Marketing Dept
- 15 + years of experience in sales and marketing
- Holds bachelors degree in commerce



**Niraj Lodha**  
*Whole Time Director*

- Leads South Zone of company's sales and Marketing Dept
- 15 + years of experience in sales and marketing
- Holds bachelors degree in commerce



**Mrutyunjay Mahapatra**  
*Independent Director*

- Has served as Deputy MD at SBI & MD and CEO of Syndicate Bank
- 40+ years of experience in Banking and Finance Sector
- Holds Bachelors and Masters Degree in Physics



**Jasjeet Singh Bagla**  
*Independent Director*

- Presently associated with IISER, Mohali
- 23+ years of experience in Research and Academia
- Holds Bachelors and Masters Degree in Science, PhD in Physics



**Romi Jatta**  
*Independent Director.*

- Presently Group Chief Procurement Officer at Minda Corporation Ltd
- 20+ years of Experience
- Holds Bachelors degree in Electronics Engineering



**Vikas Modi**  
*Independent Director*

- Partner in Doogar and Associates, a CA firm Since 2006
- Holds a Bachelors Degree in commerce , CA with membership from ICAI



## 6. EXPERIENCED BOARD AND SENIOR MANAGEMENT TEAM (2/2)

### Senior Management – led by people with significant experience in HCS Industry



**Hemant Agarwal**  
**Chief Operating Officer**

- 20+ years of experience with the company
- Holds a bachelors' degree in commerce from the University of Calcutta



**Hirdey Vikram**  
**Chief Sales and Marketing Officer**

- 11+ years of Experience with the company
- Previously associated with HCL Infosystems Limited
- Holds a B.Tech (Information Technology)



**Mukesh Golla**  
**Chief Research and Development Officer**

- 19+ years of Experience with the company
- Holds a B.Tech (Computer Science and Engineering)

### Other Key Management Personnel



**Ankit Kumar Singhal**  
**Chief Financial Officer**

- 13+ years of experience in Accountancy and Finance
- Holds a bachelors degree in commerce and is a chartered accountant



**Lohit Chhabra**  
**Company Secretary and Compliance Officer**

- 8+ years of experience in secretarial compliance
- Holds a Bachelors degree in commerce and also holds a certificate of membership from the Institute of Company Secretaries of India



# GROWTH DRIVERS

Opportunities to realize sustainable growth of the business



## Strong Topline Visibility

Pipeline#  
₹ 39,714 Mn

L1#  
₹ 3,628 Mn

Order Book  
₹ 3,252Mn



## Enhanced Capabilities

State of the art new manufacturing facility with latest Surface Mount Technology (SMT) commissioned in May'24

AI native appliances with built-in GPU resource abstraction using Skylus.ai

Under our OEM partnership with NVIDIA, we have established a roadmap to design and develop AI GPU systems based on the world's most advanced NVIDIA Blackwell platform. This will solidify Netweb's technological leadership in the AI domain

Launched Intel Emerald Rapids & AMD Turin based 'Make in India' high-end computing servers



## Enhanced Opportunities

Rising investments in Generative AI infra by Govt & Large enterprises, especially to cater to demand generated by indigenous LLMs

Heavy adoption of Private Cloud across sectors

Huge demand of high-end compute for booming in-bound data centers across India

Foray into Europe & Middle East, plan to setup service network in 4 countries to start with



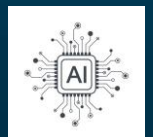
## Expanding Product Portfolio

Introduced Skylus.ai, a unified solution to set up a GPU-based AI infrastructure on the go

Forayed into developing new product lines, viz., Network Switches

On-prem AI Sovereign cloud for demand of contemporary data & AI workloads

Container Platforms replacing Virtualization Platforms





# Thank You



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