

32nd Annual General Meeting

DigiSpice Technologies Limited

15th December 2020

The world is going through an accelerated Digital Transformation



There are major shifts in the Indian Rural Ecosystem

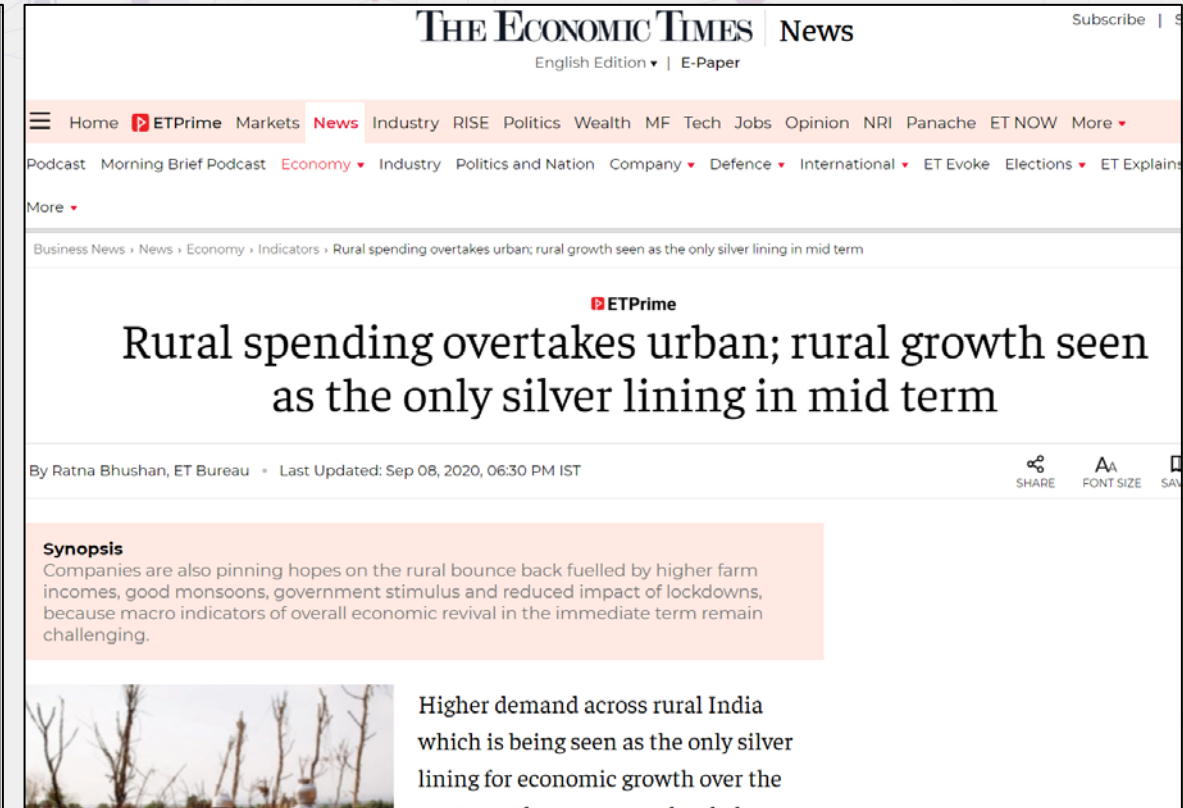
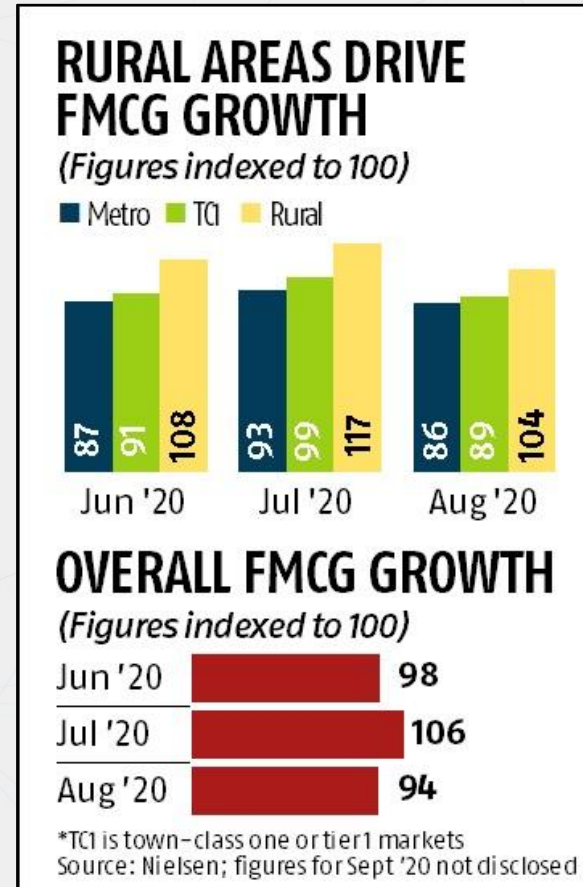
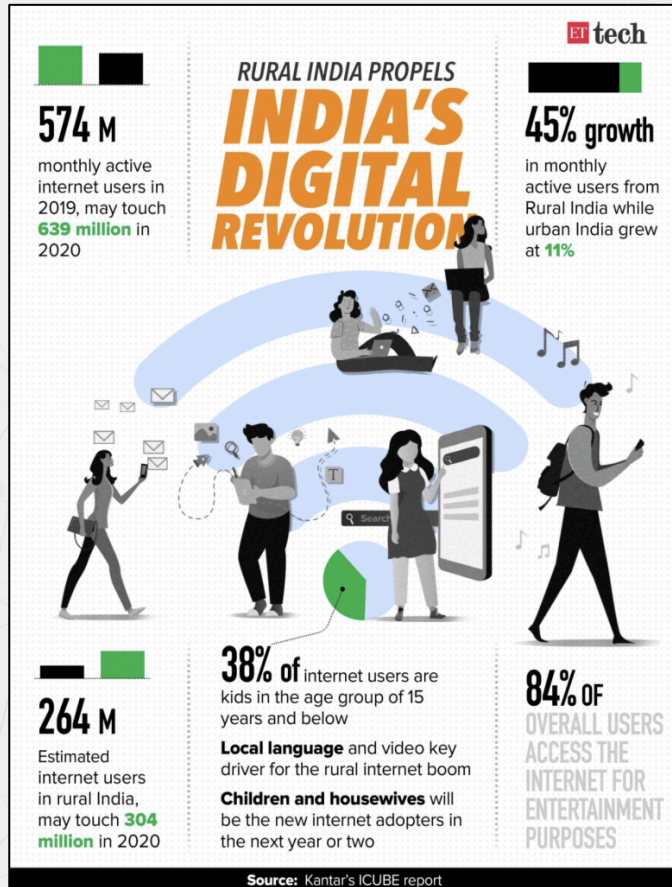
Migrants going back to their villages



Acceleration of Digital



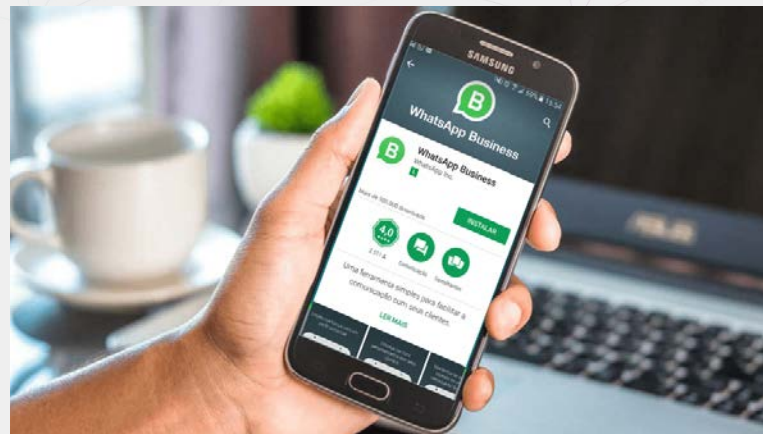
The resilient & growing Indian rural economy



Building Digital Platforms



Digital Rural



Digital Enterprise

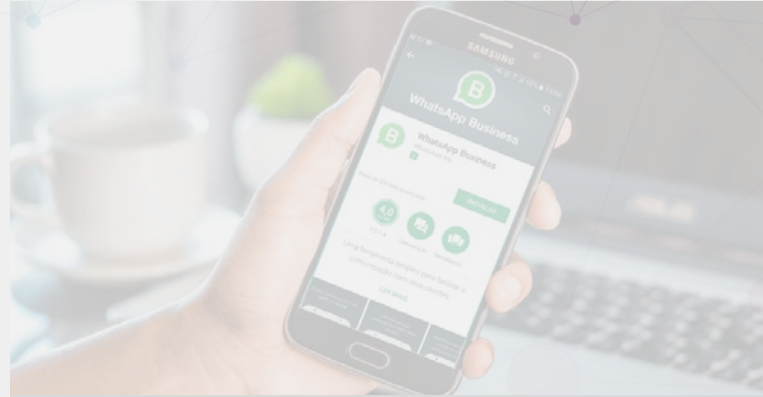


Digital Telco

Building Digital Platforms



Digital Rural



Digital Enterprise

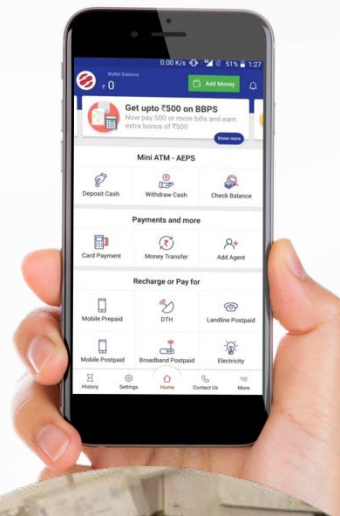


Digital Telco



Our Mission

To Digitally and
Financially empower
over **1 Crore**
Rural Entrepreneurs



Constantly Growing Entrepreneurs Network

Close to 5 Lakh Entrepreneurs
(Known as **Spice Money Adhikaris**)

Financial
Entrepreneurs

Agriculture
Product
Providers

Kirana Shop

Stationery Shop

Mobile Store

Travel Agent

Courier shop

Pharmacist

Growing base of 10 Crore +
Transacting customers



Wide Presence across India

90% of Network in Semi-urban & Rural India



18000 +
Pin Codes

700+ Districts

5000+ Blocks

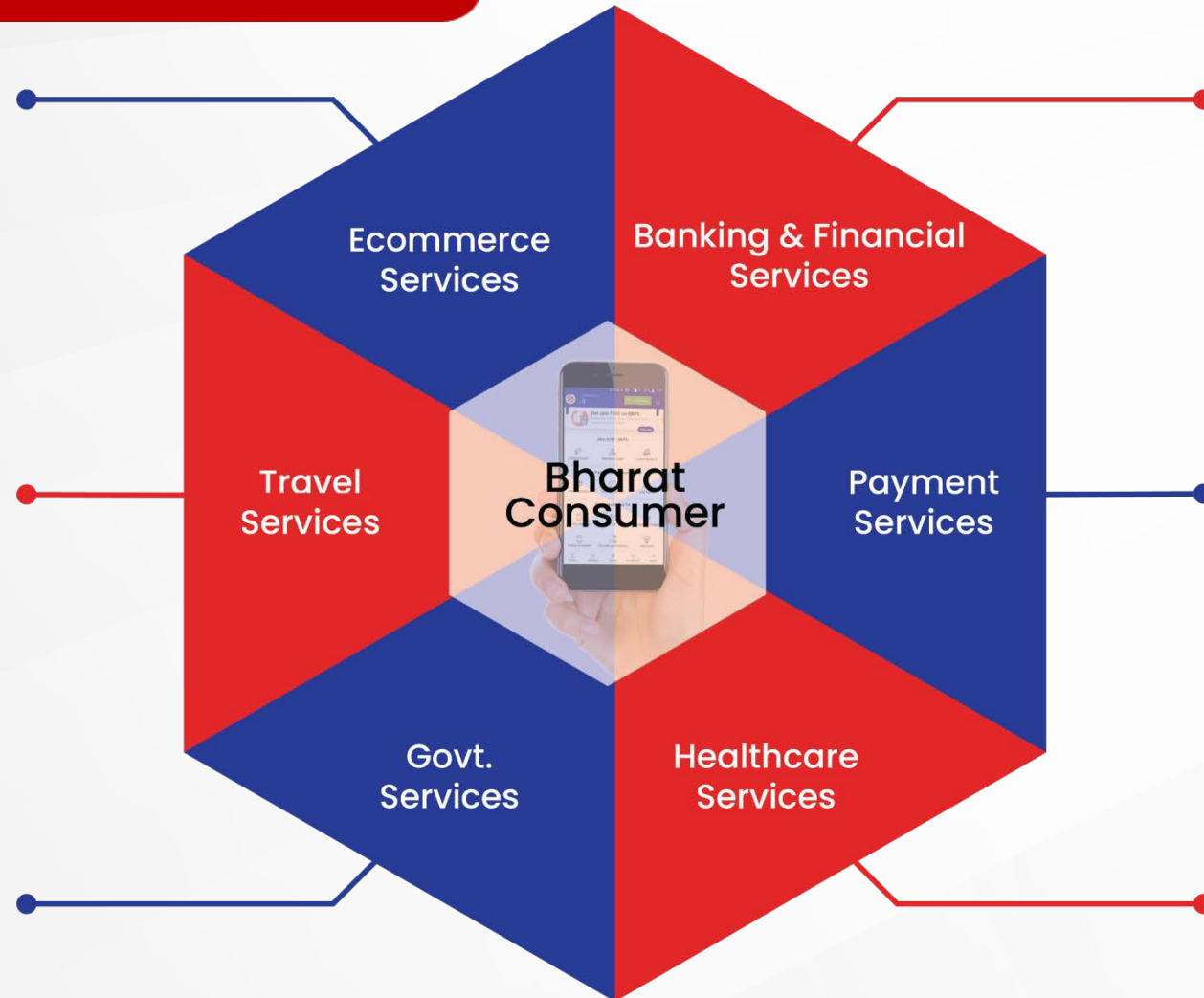


Expanding services portfolio

Assisted E-Commerce

Ticketing
Tour Packages
Visa/Passport Services

Government to
Citizen Services

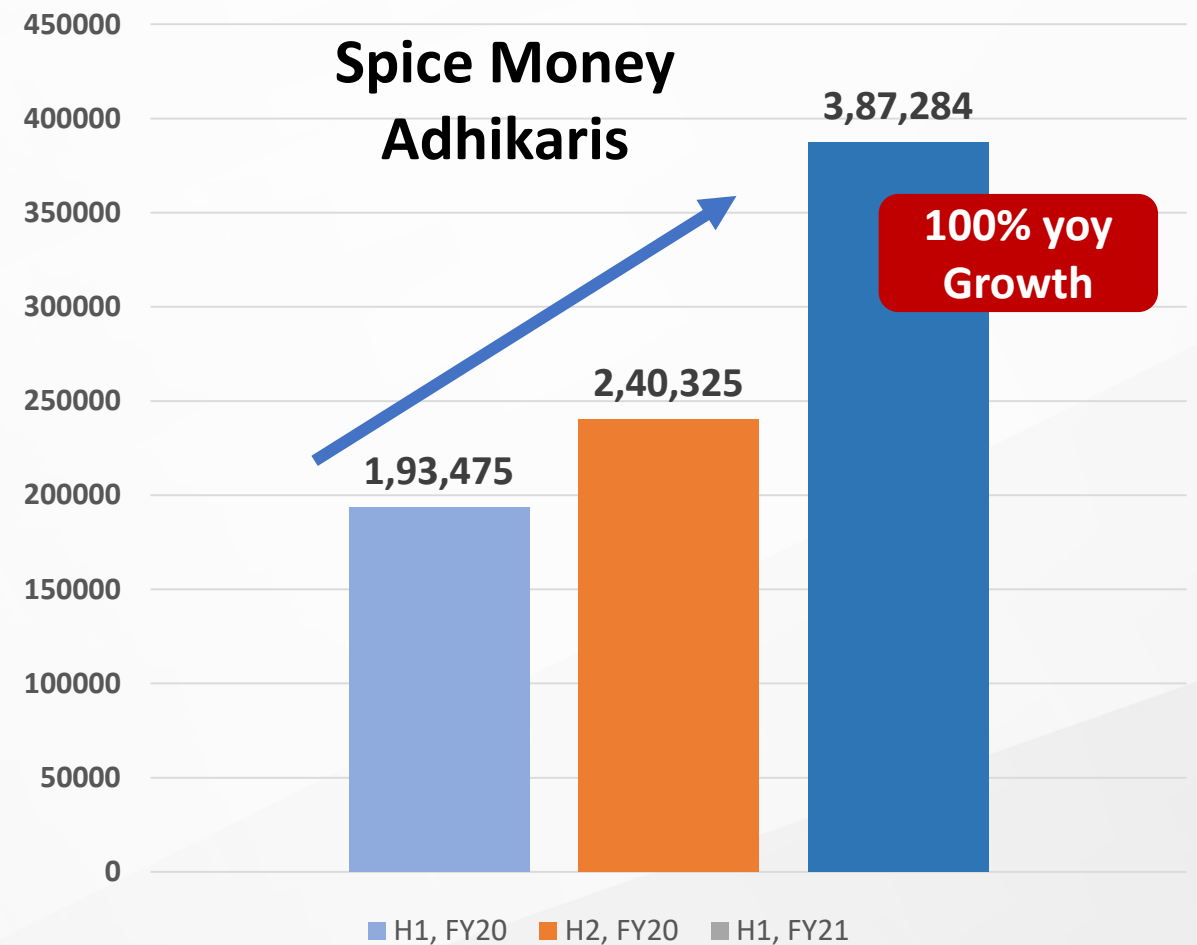
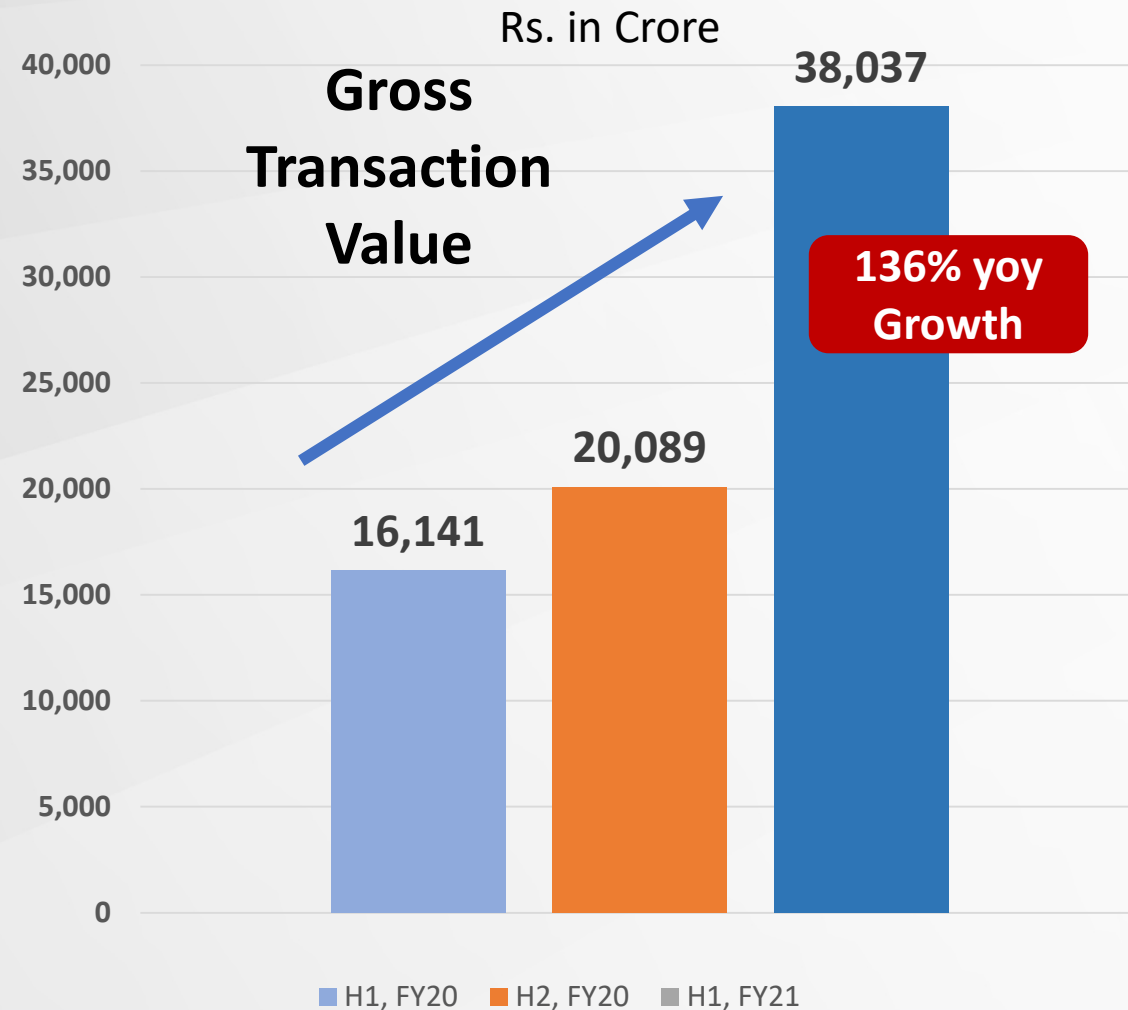


Banking, mATM
Savings
Insurance
Loan

Digital Payment
Bill Payment
Mobile/DTH Recharge

E-Pharmacy
Diagnostics
Telemedicine

Exponential Growth



Introducing Sonu Sood

Spice Money Brand Face



As a Brand Face

Sonu Sood is an Indian film actor, producer, and humanitarian. He has worked in several Hindi and South India regional language movies and is a successful movie star.

As a Influencer to the Segment

During COVID-19 lockdown period he helped several migrant workers reach their home state and have helped them in many ways earning genuine respect from one and all and has transcended to become a real hero.

Sonu's Partnership with Spice Money

- Collaboration to digitally and financially empower over 1 crore rural entrepreneurs.
- Spice Money will ideate collectively with Sonu Sood to design new initiatives and products that will bridge the divide between rural and urban India.
- Spice Money will also enable select existing programs developed by Sonu Sood during the lockdown, to be made available on the Spice Money platform.

As part of the association, Sonu Sood will own equity stake in the company and has been appointed as a Non-Executive Advisory Board Member.

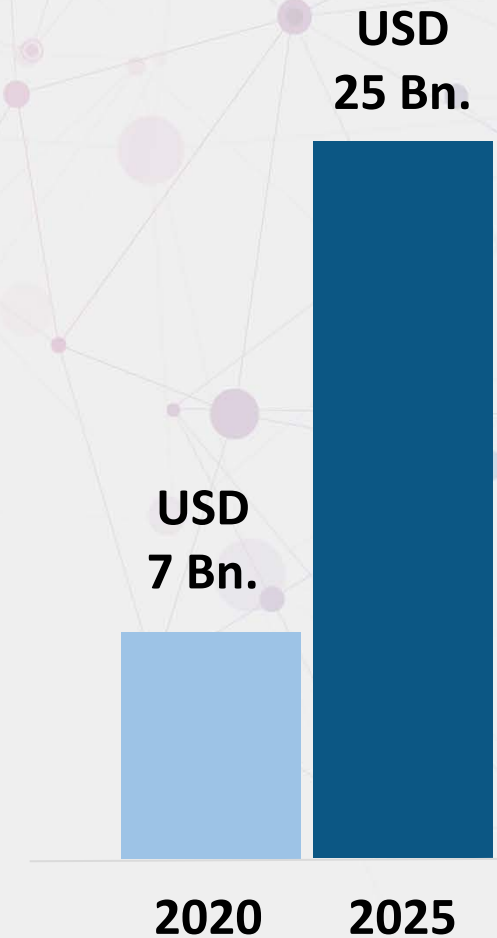
Building Digital Platforms



Digital Enterprise

Global CPaaS Market

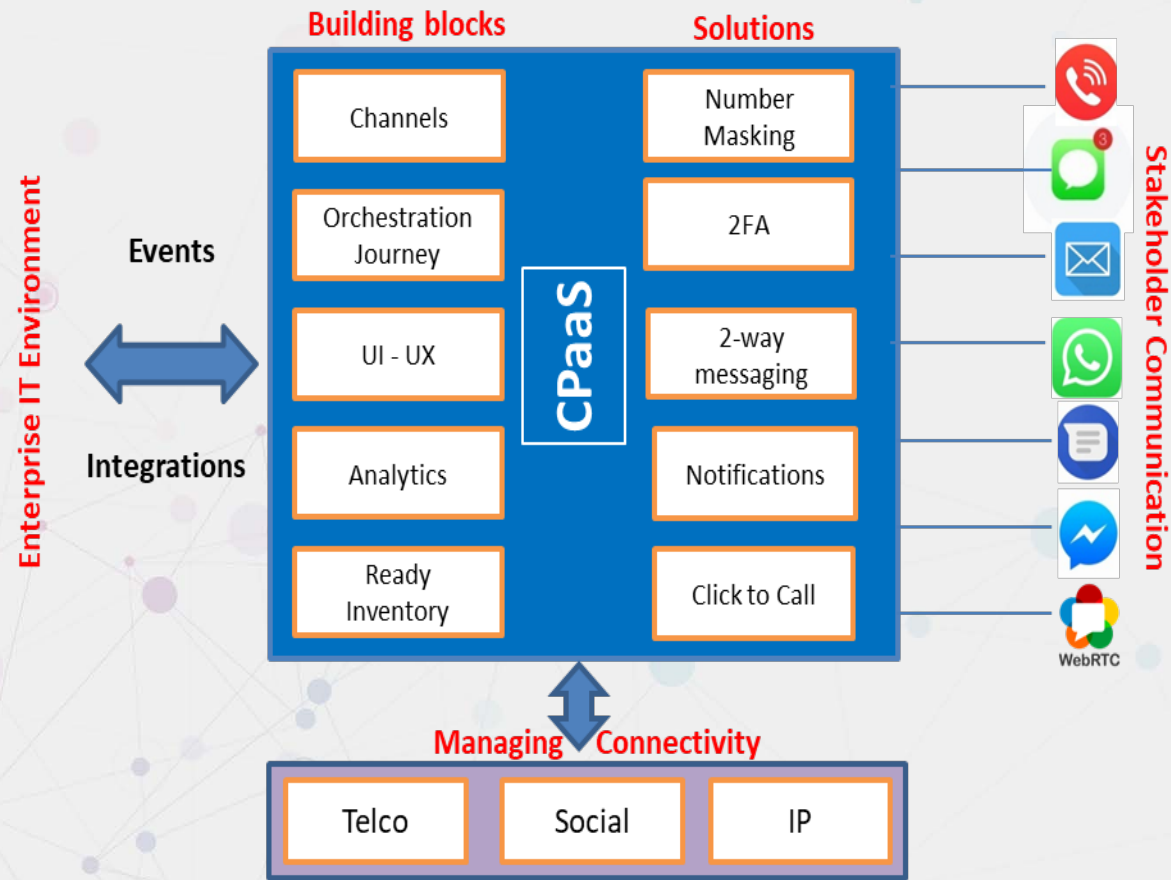
- The total value of the CPaaS (Communication Platform as a Service) market is expected to reach \$25 billion in 2025; rising from an estimated \$7 billion in 2020.
- Over 95% of CPaaS revenue will be attributable to SMS in 2020 owing to the ubiquity of SMS amongst mobile subscribers. However, by 2025, SMS will drop to 70% of revenue, as alternative rich media messaging solutions gain traction in the CPaaS space.



Source : Juniper Research

Communication Platform as a Service (CPaaS)

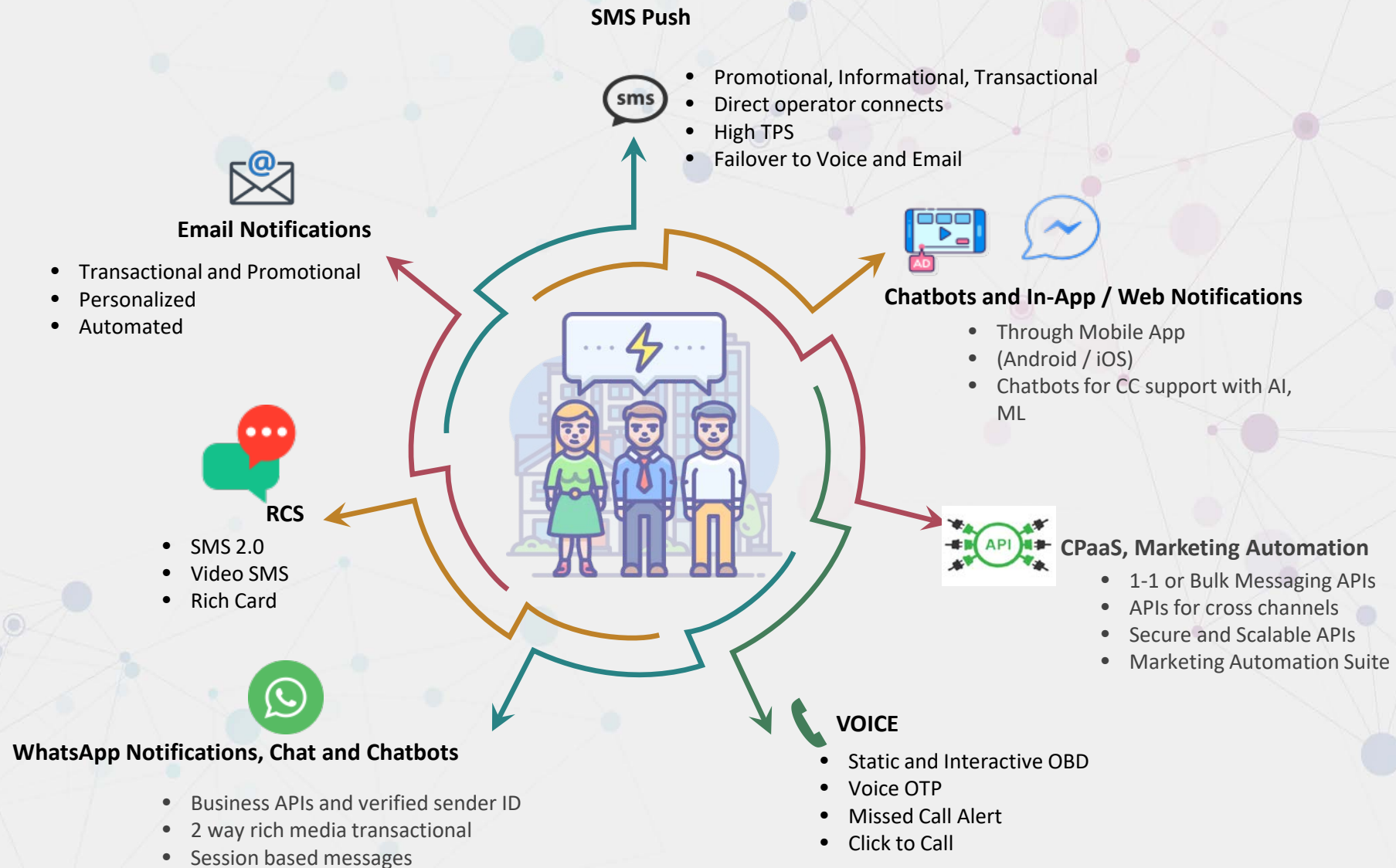
Easy to use communications platform for enterprises to accelerate their IT roadmap while improving CX, reducing cost and complexities.



Marketing Automation

Create, manage and maximize marketing campaigns with AI based recommendation tools to drive customer lifetime value.





Building Digital Platforms



Digital Rural



Digital Enterprise



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Digital Drivers



Digitization

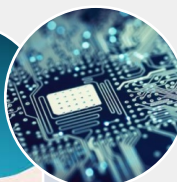


Smartphone proliferation



High Speed Connectivity

Key Trends



AR / VR & Gaming

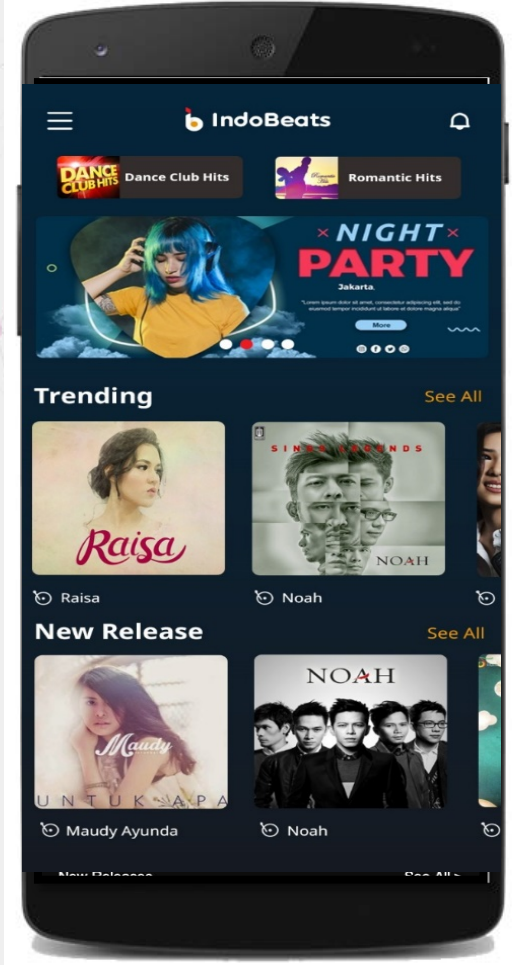
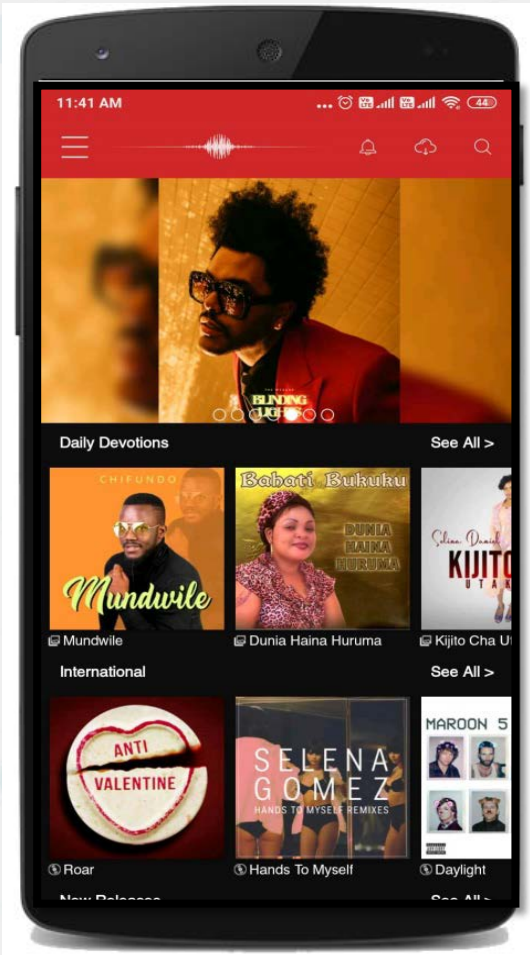
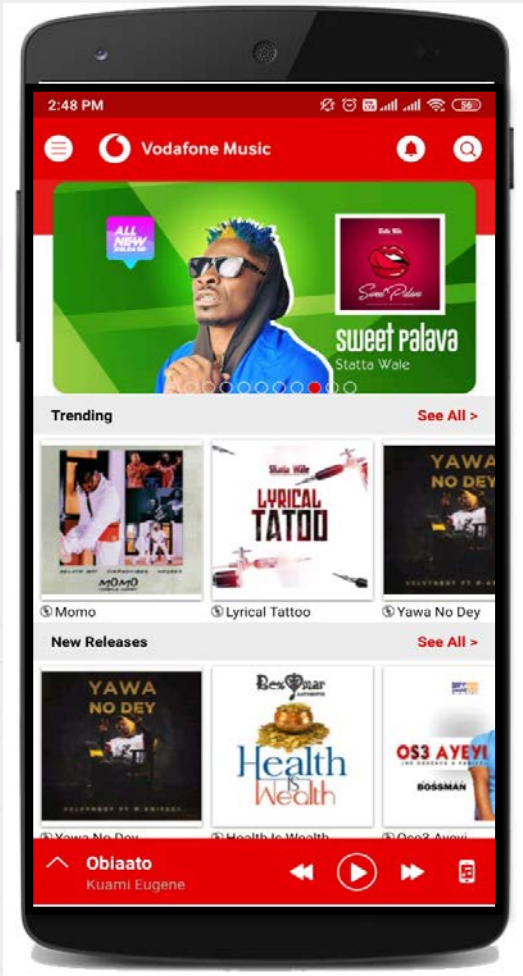


P & RE



VOD SERVICES

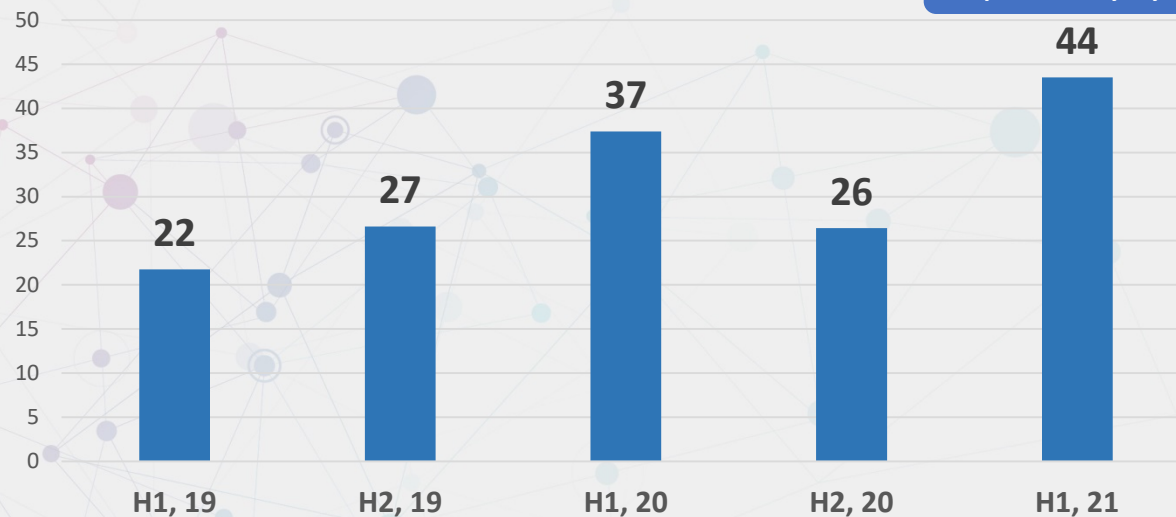
- **4540 Mn.** Internet users globally encompassing **59%** of Population
- **5190 Mn.** Smartphone users globally encompassing **67%** of Population
- Average broadband speed increased to **47.7 Mbps** from **24.7 Mbps** , a factor of 1.9
- AR / VR could hit **150 Bn USD** revenue by 2020
- Digital Gaming size to be about **115 Bn** in 2020
- **75% of the customer** feel that dynamic and personalized content across access channel is a must
- Video will make up to **82% of internet traffic in 2020** , up from 70% in 2015
- 66% Annual growth in VoD services till 2019



Accelerating Growth across Digital Businesses

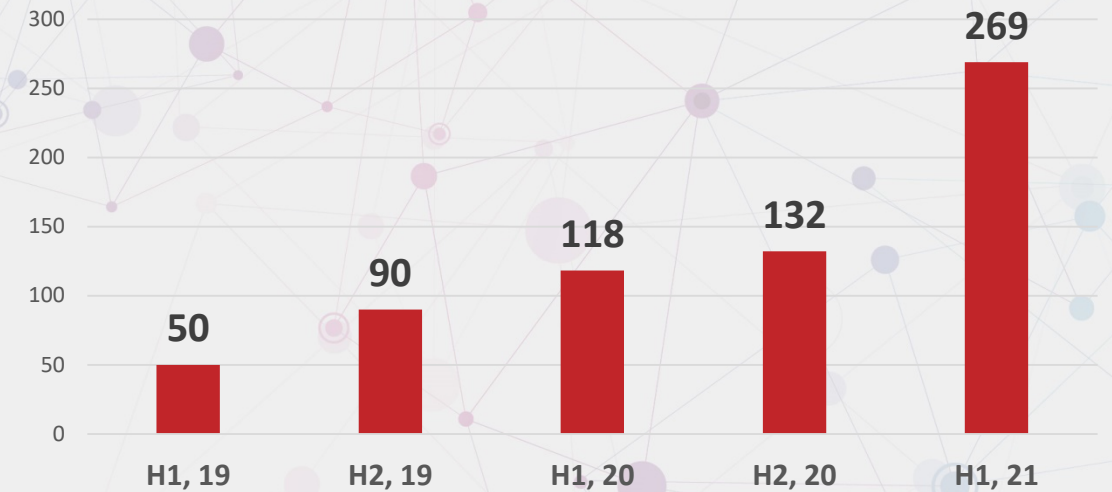
Digital Enterprise (Revenue in INR Cr.)

up 16% yoy



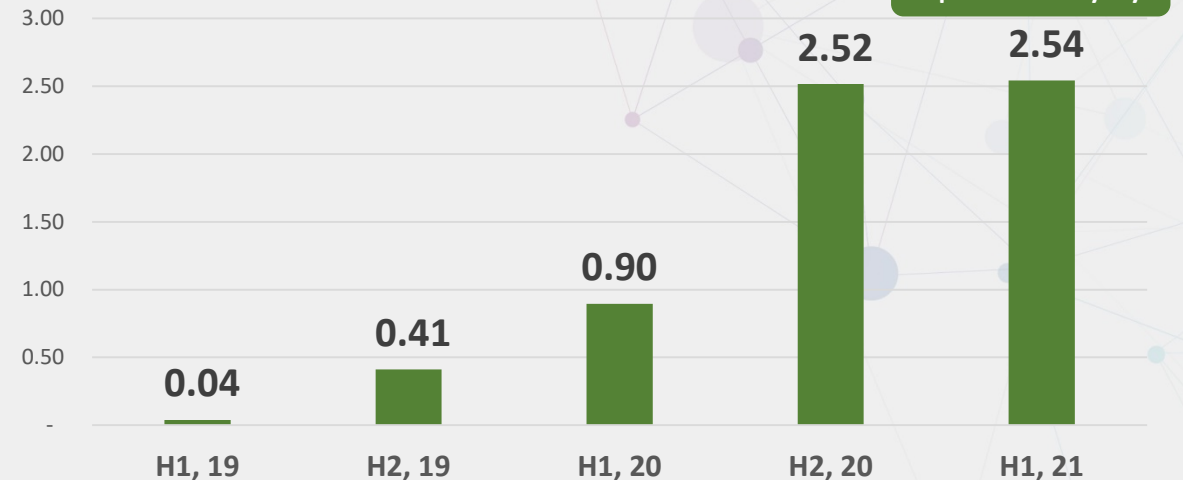
Rural Fintech (Revenue in INR Cr.)

up 128% yoy



Digital Telco (Revenue in INR Cr.)

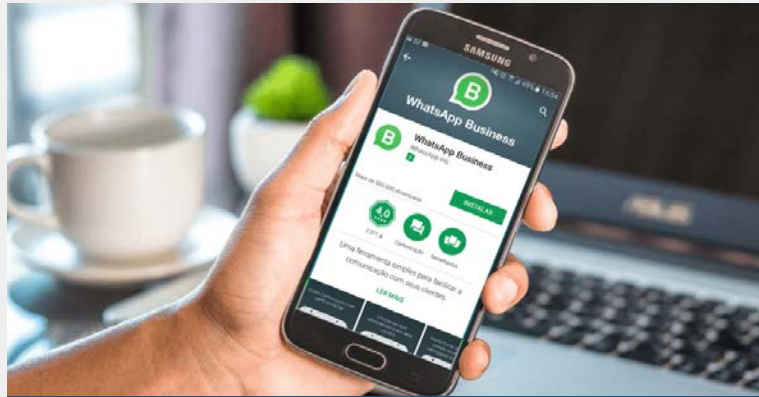
up 184% yoy



Investing behind the accelerating Digital First world



Digital Rural



Digital Enterprise



Digital Telco