

Infosys Limited Investor AI Day 2026

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So my colleagues, Dinesh and Satish, talked about AI-first services, which is new value pool that is being created out of AI. What I am going to be talking about is AI augmented services. What we mean by that is taking our traditional services and infusing AI in that, and we want to be a leader in this space as well, and I will talk about how we are doing that.

So we have taken each of our services that we actually traditionally provide, whether it is application development, testing, modernization, migration, engineering services, business operations. So 20 plus services that we actually provide, and we have created detailed playbooks of how we can use AI in transforming the way we deliver these services.

When we are doing this, we are partnering with the best of the technology that is out there. We are working with leading models from Anthropic, from OpenAI, from Gemini, from Amazon Nova. And in fact, we are also working with open-source models, like DeepSeek, Llama, and we have even created our own coding model in this space, perhaps the only GSI that has actually created a coding model. So we use a combination of these models that in our engagements.

So in the Hertz example that you actually saw, we, used two models. We used a Claude model that actually generates the code. And one of the things about LLMs are they are better in critiquing output than generating output. So we used an OpenAI model to critique that output, and that is how we actually improved the accuracy.

So one is the models. The second is the tools. And in the tools, we are working again with the leading tools. GitHub Copilot was the first, and it had almost 100% of the market share. 2 years back, we set up a GitHub COE that was inaugurated by the CEO of GitHub. And then we are still ranked the number 1 GSI in terms of GitHub adoption. Just a few months back, we got this award as the leading GSI for working on GitHub.

But just not GitHub, we are working with Anthropic, we are working with Gemini, we are working on, on the models from Anthropic CLI. We are working on the new age models, Devin from Cognition, also we are working with Cursor.ai that you would have recently seen. So we are working with the leading models. We are working with the leading tools.

But then, again, as my colleagues also talked about, a lot of these models do not understand the enterprise context. They do not understand the standards that are there in the enterprise. They do not know other libraries that are there, other programs that are there. So we have to do a lot to actually bring that context into the tools that we are actually using. So, we do that by creating MCP registries. We create a knowledge graph of the enterprise context and we combine that. In the recent release that we just did with Anthropic, you hear Dario talking about that. They need Infosys to bring the enterprise context onto the models, and that is what we actually do.

In addition to that, we have actually created agents specifically for each kind of services. So in application development, we have taken the life cycle and said we need agents for requirements, design, architecture, etc. And we have created 100 such agents that we are using in each of our services. In addition to that, we have to create other tools. You saw in the Hertz example, the LLM models cannot digest huge pieces of code at one time. Some of these enterprises that we work with have millions of lines of code. If you give that to the LLM, they start to hallucinate. So, you have to shrink the code, you have to create graphs, call graphs on how these are actually associated, and that is when you get better output from LLM. So we have created all of these assets that are part of our Topaz Fabric, which my colleague, Rafee will actually talk about in more detail in the next section.

In spite of doing all this, we need talent. And sometimes people ask me, if LLMs are generating code, why do you need people? Why do you need developers anymore? And I think they asked the same question to Boris Charney from Anthropic, because Anthropic is continuing to hire developers. So somebody on X asked him, if Claude code can actually generate code, why are you still hiring software developers? And his response was that engineering is changing, but great engineers are a requirement still and in fact, the most important requirement going ahead. And that is something that we also actually believe.

The way that we actually deliver code or the way we support applications may change, but still you need great talent. And so what we are doing is to take each of our developers and training them on AI. So we have 90% of our developers that have been trained on AI. It will never become 100% since we are always hiring new people into the stream. But our intent is to actually have everybody be able to use AI in their daily work.

In addition, we need specialized roles, like forward deployment engineers that will create the platforms that the teams will actually use. And then we have created COEs for each of the partnerships that we have. So it is a combination of all of these that actually helps us deliver our AI-induced services.

It is the blueprint, it is the technology, our own technology plus the leading technology that is out there and the people that we actually create. The way we are going to market is also, as you saw in the Hertz example, is not about PPTs anymore, it is about actual demos, and that is what we see creates the impact, and that is how we actually go to market in all of our large deals.

I will talk about a couple of examples of how we are using it in actual programs that we are executing. What better example than Microsoft, who is in the leading edge of this kind of technology adoption, creating the technologies and also adopting this technology. So in Microsoft, we have a 360-degrees partnership. What we mean by that is that we go to market with Microsoft, we are one of the big customers of Microsoft, Microsoft is our customer. We provided services to Microsoft and we do multiple engagements with them, but I will give you a couple of examples of what we are doing.

Microsoft themselves are going through a big transformation. From enterprise agreements, they are going to what they call MCAs, Master Customer Agreements. What this means is that through the master customer agreement, they want to eliminate all the paperwork that they had to deal with in the enterprise agreement. They also are talking about evergreening the licenses. So enterprise agreements had only 2 years' timeframe. This is perpetual agreement that you can use for multiple years. Enterprise agreements had a minimum seat count of 250. This actually has no minimum seat count. In addition, in MCAs, you are able to monitor your usage, adapt your usage, you are billed based on your usage, you get a very flexible billing. So multiple advantages for the customers of Microsoft by using this agreement.

And also for Microsoft itself, because you are not having papers and documents anymore, it eliminates and accelerates the way they go to market and also the operations that they have, On this engagement, they had to build the IT system to manage all of this. So Infosys is actually working with them to build that. We used all the technologies that I actually talked about, and we are getting 2x developer velocity and 35% improvement in the time to market.

The other engagement that we are working with Microsoft is on their Intelligent Cloud. So, as you know, this includes Azure and Microsoft Office. They carry a lot of mission-critical systems of Microsoft customers on these clouds. And it is important for Microsoft that for these mission-critical applications that there is no downtime and then it is actually trustworthy. So, Infosys is again providing support for Microsoft on this. And the way that we have used AI, is that AI agents today monitor the logs and predict issues before they actually happen. And they give all of this intelligence, which we call triaging, and then we route it to a specific support engineer with the information, so that they can actually work on it before the issue actually happens. So this is for both reactive and proactive issues. And so you can see that we get 40% improvement in the incident response and 10x improvement in the RCA turnaround.

So there are several such examples. The other example that I have here is Danske. Danske has a Forward '28 Strategy where they are looking at modernizing their entire landscape. They want to bring process efficiency and they want to completely create it as a digital bank. So you must have seen the press release where they have chosen Infosys for this transformation, and we are helping them on the AI strategy and transformation as well. And we are doing everything from AI strategy to implementation. We have set up an innovation lab for them, and we are creating multiple AI solution work streams.

So we are using Agentic AI in the code development, more than 2 million lines of code that we have generated. But then again, these lines of code that we generate has to be validated, and that is what our engineers have been trained to actually do. And 97% of the engineers are using that. In addition, we have created multiple AI solutions. They wanted to use ChatGPT, but they wanted the guardrails.

So we created enterprise ChatGPT, which has over 16,000 users. They created other solutions on risk and HR, which have been quite successful.

D. R. Balakrishna

With this, I will hand it back to Simran. Thank you.