



GLOBAL CAPITAL

Sector Focused Investment Banking
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servicenow®

The \$1 Trillion ServiceNow Opportunity: How GenAI is Supercharging the Partner Ecosystem

Market Overview, Trends and Deal Activity

+ JUNE 2025

Introduction

In an era defined by digital acceleration, organizations are increasingly turning to strategic partnerships to unlock innovation, streamline operations, and enhance customer experiences. ServiceNow's thriving partner ecosystem is at the forefront of this transformation, empowering businesses to harness the full potential of IT Service Management (ITSM), intelligent automation, seamless workflows, and enterprise-wide efficiency.

This report offers a comprehensive analysis of the evolving ServiceNow partner landscape, uncovering key market trends, strategic collaborations, and growth opportunities. By exploring the critical role of partners in driving digital transformation, it provides valuable insights for businesses looking to navigate and maximize the power of the ServiceNow ecosystem.

Why download this report

ServiceNow's impressive expansion, coupled with increasing consolidation within its partner ecosystem, has drawn significant interest from investors and buyers looking to acquire expertise in both the platform and the services suit. The synergy between ServiceNow's market leadership and the value-driven opportunities in M&A creates a compelling case for buyers seeking innovation, scalability, and long-term growth within the market. As ServiceNow continues to solidify its role as a leader in various digital transformation platforms, TH Global Capital's research has curated this report to offer key insights for stakeholders looking to navigate and capitalize on this evolving landscape.

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About TH Global Capital

TH Global Capital (formerly known as Technology Holdings) is an award-winning global investment banking firm specializing in sector focused **Investment Banking**, **Asset Management**, and **Growth Advisory services**. With a **24-year** track record, TH Global Capital's offering includes **Sell Side M&A**, its **Buy Side M&A practice 'TH Buy and Build'**, **Growth Capital advisory**, **Debt Financing**, **Financial Sponsor Coverage & Secondaries**, **IPO Advisory**, **Asset Management** and **Growth Advisory services**. TH Global Capital's full service, purpose driven approach reflects its mission - to create wealth for founders, companies and investors. Operating in **13 countries** across the **Americas**, **Europe**, and **Asia-Pacific**, TH Global Capital combines global reach with local presence to deliver exceptional results.



Our focus, with a 24-year track record...



Digital Transformation & Innovation



IT Services Cloud & Cybersecurity



Analytics, Data Sciences & AI



Fintech, Insurtech and SaaS



Consultancies



Healthcare & Lifesciences



Business Process Management



Engineering Services

- | | |
|-----------|------------|
| LONDON | MANCHESTER |
| NEW YORK | HELSINKI |
| SAN JOSE | STOCKHOLM |
| TORONTO | SINGAPORE |
| SÃO PAULO | MELBOURNE |
| BARCELONA | SYDNEY |
| MADRID | MUMBAI |
| VALENCIA | NEW DELHI |
| MILAN | BENGALURU |
| PARIS | KOLKATA |
| MUNICH | |

Key Takeaways



ServiceNow resonating the market need

- Global software and digital transformation spending is on the rise
- Increasing cloud complexities are making service management pivotal
- Need to manage enterprise security operations and the limited security talent pool
- Adapting to evolving regulatory and governance requirements to stay compliant and reduce risk



Building a prosperous partner network

- Consulting & implementation partners – 1,299
- Resellers – 1,025
- Build partners – 967
- Service provider partners - 569

As of May 2025



IT services valuation levels remained stable

- IT Services and BPO Companies' EV/EBITDA Trends: started at 10.6x in January 2018, peaked at 20.2x in November 2021 and closed at 15.1x by December 2024
- Despite the economic instability marked by inflation and escalating interest rates in 2024, the IT Services sector has shown remarkable resilience



Need for services & operations management levitating the market

- ServiceNow offerings and capabilities are evolving to pivot into broader scope beyond traditional Information Technology Service Management (ITSM) which catered only to the IT departments
- Enterprise Service Management (ESM) is known to go beyond ITSM to encompass services and operational capabilities to non-IT workflows



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SECTION 1

Market Overview

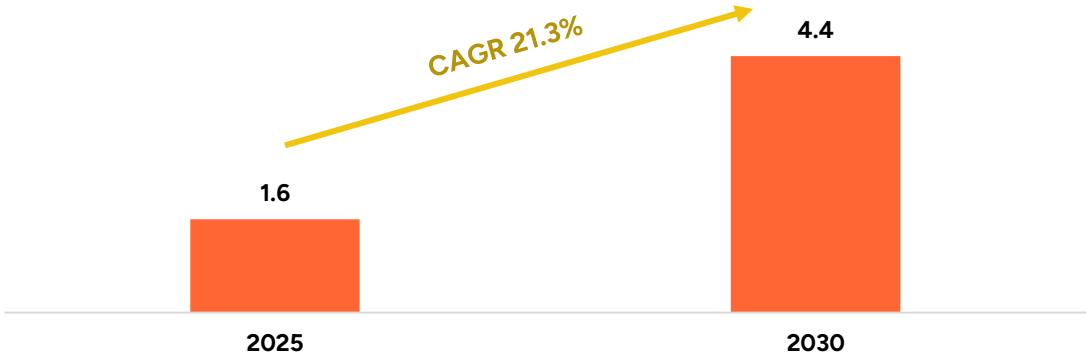
ServiceNow Market Outlook

¹ServiceNow Partner TAM, 2027 (E)

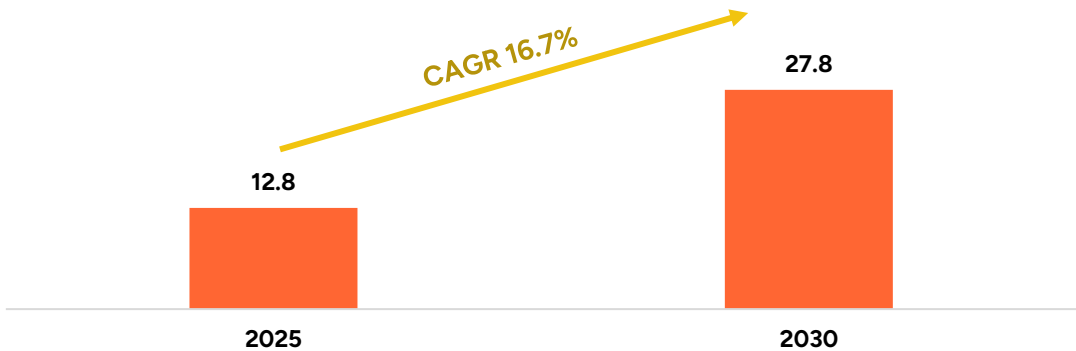


GenAI infusion will drive the ServiceNow TAM to \$1 Tn

²Digital Transformation Technology Investment, 2025-2030 (\$ Tn)



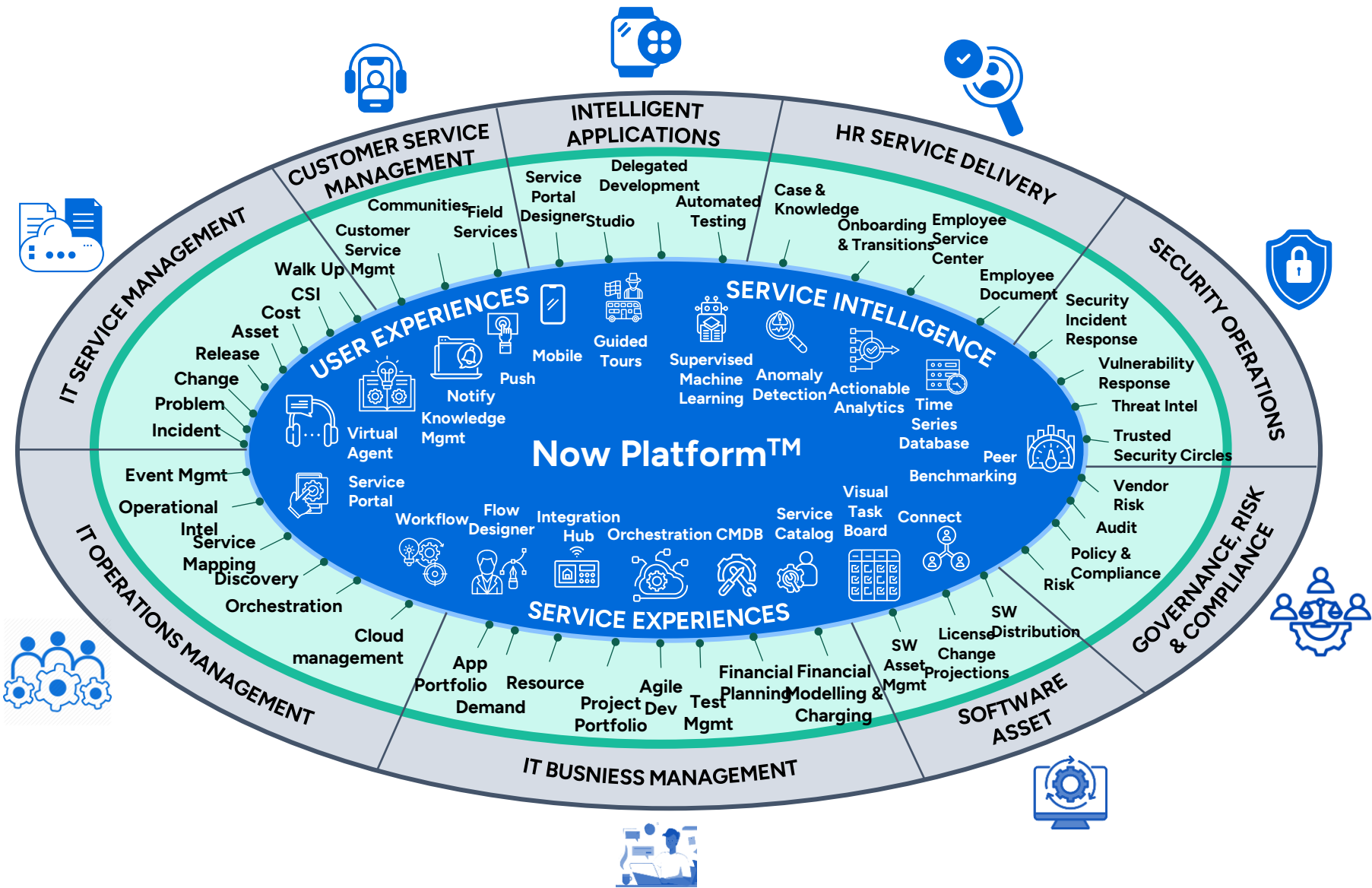
³IT Service Management Market Size (\$ Bn), 2025-2030, (E)



Investments in digital transformation and ITSM market complementing ServiceNow adoption

Source: ¹ServiceNow Partner Portal
²Mordor Intelligence
³Mordor Intelligence

ServiceNow Services Segment



ServiceNow market has transformed **from traditional ITSM provider to broader Enterprise Service Management (ESM) platforms** that includes segments like customer service management and HR service delivery. These new segments contribute significantly to ServiceNow's net new annual contract value

Leading ServiceNow Partners Across Regions and Market Segments

	ServiceNow Consulting Services	ServiceNow Implementation & Integration Services	ServiceNow Managed Services Providers
US	Logos: accenture, Capgemini, Cask, HEXAWARE, ActionNet, Sparksoft, HORIZON, DXC TECHNOLOGY, HCLTech, IBM, NTT DATA, Infosys, TISTN, NETIMPACT STRATEGIES	Logos: accenture, Capgemini, Cask, cognizant, Deloitte, DXC TECHNOLOGY, tcs, HCLTech, Tech Mahindra, Infosys, LTIMindtree, HEXAWARE, wipro	Logos: accenture, Capgemini, Cask, HEXAWARE, cognizant, Deloitte, DXC TECHNOLOGY, HCLTech, Tech Mahindra, CORETEK, zeb, DRT
Europe	Logos: esp GLOBAL SERVICES, agineo, Capgemini, cognizant, fusion, EUVIC, Kaptius, EVIDEN, KPMG, LTIMindtree, Veran, Project Foundry, T Systems	Logos: accenture, agineo, Capgemini, cognizant, Deloitte, EVIDEN, HCLTech, PLATOMATION, tcs, FUJITSU, Infosys, T Systems, kyndryl, wipro	Logos: accenture, Capgemini, HEXAWARE, cognizant, EVIDEN, LTIMindtree, FUJITSU, NTT DATA, Argos, T Systems, Infosys, kyndryl, wipro
Asia Pacific	Logos: accenture, agineo, Capgemini, cognizant, Deloitte, CubeSimple, Infosys, PLATOMATION, tcs, AELUM CONSULTING, NEW VISION, LTIMindtree, wipro	Logos: accenture, agineo, Capgemini, cognizant, Deloitte, EVIDEN, T Systems, PLATOMATION, KPMG, Infosys, LTIMindtree, wipro, tcs	Logos: accenture, agineo, Capgemini, cognizant, PLATOMATION, Deloitte, EVIDEN, T Systems, Infosys, LTIMindtree, KPMG, wipro, tcs



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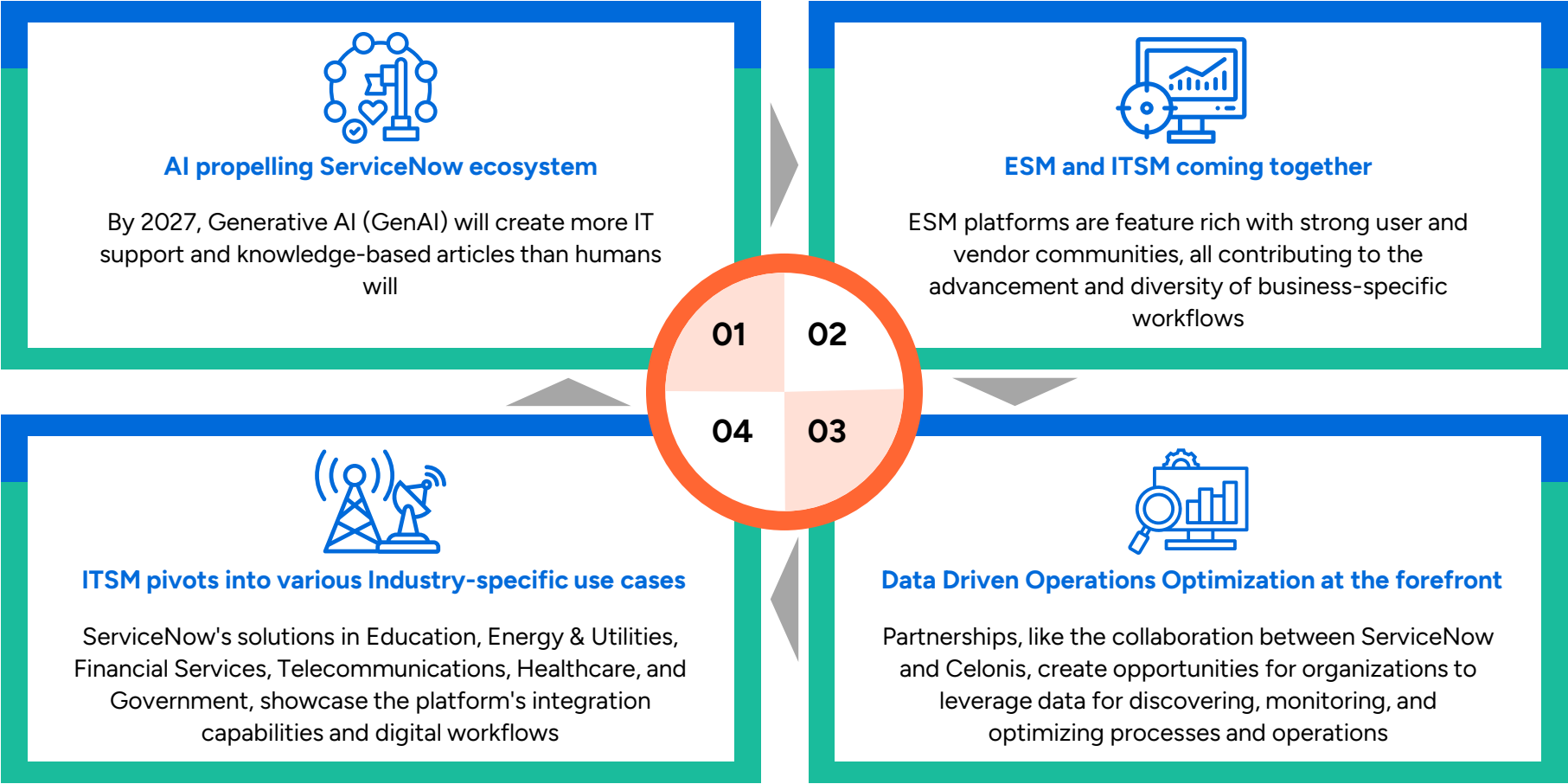
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SECTION 2

Market Trends



ServiceNow Trends Defining Future Roadmaps



AI propelling the ServiceNow Ecosystem

ServiceNow Acquisitions for GenAI Capabilities

Date	Target	Service Specialization	Target HQ
Jan-25		Leader in AI native conversation data analysis and insights	Americas
July-24		Information retrieval technology	Europe
Mar-24		Connected worker platform	Europe
Dec-23		Intelligent automation	Europe
May-23		AI for RetailTech	Europe

Strategic Collaboration for GenAI capabilities

Mar-25  Moveworks Together with Moveworks, ServiceNow will drive use of its agentic AI platform across key growth areas including CRM	Dec-24  Enables seamless use of multimodal models developed & trained on Amazon Bedrock for GenAI-powered workflows on the Now Platform
Nov-24  New Center of Excellence brings together DXC's industry and AI expertise and ServiceNow's GenAI solutions to streamline AI adoption	Nov-24  Enhanced alliance builds on existing ServiceNow Now Assist and Microsoft 365 Copilot integration that streamlines workflows and enables self-service capabilities within Microsoft apps

Gartner Magic Quadrant for AI Applications in ITSM



By 2027, Generative AI (GenAI) will create more IT support and knowledge-based articles than humans will. ServiceNow has 70 plus partners who have 5+ certified resources in the GenAI capability space

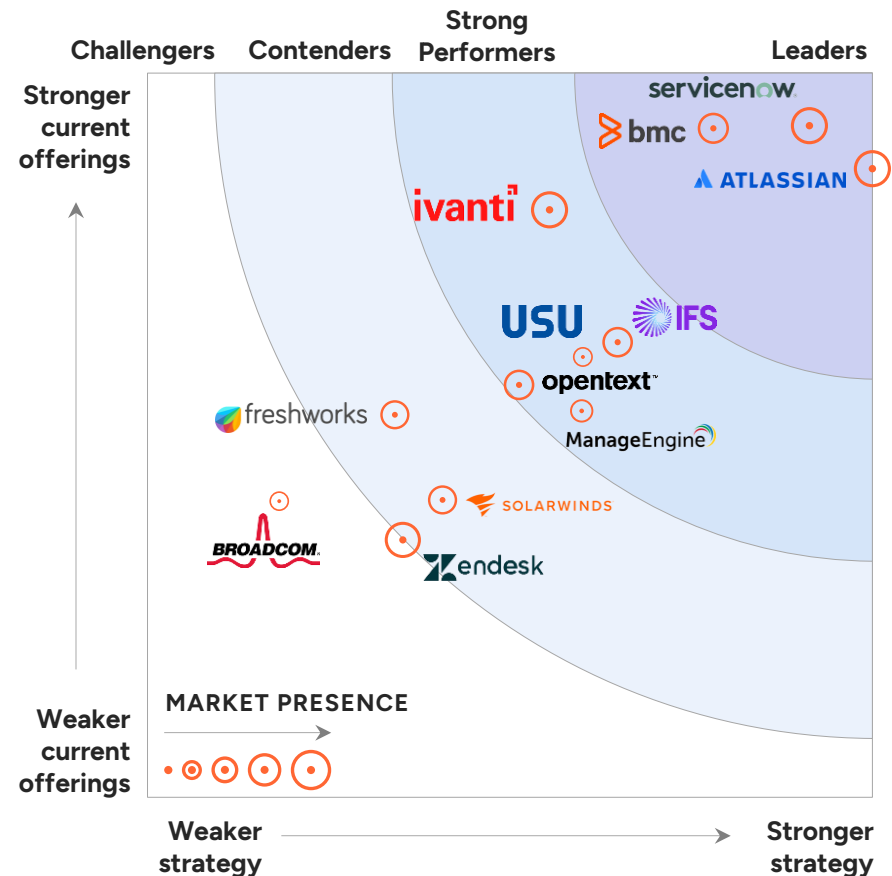
ServiceNow has been adding AI capabilities across its platforms, services and industry vertical offerings inorganically and through strategic alliances

Source: ServiceNow News releases

ESM and ITSM capabilities coming together

- **Cross team service delivery** – Many I&O leaders are looking at aligning **service delivery practices** and the need to have **single service delivery platform**. This is leading to a service management strategy that spans both IT and different lines of business (i.e., enterprise service management)
- **Maturing ITSM needs** – ServiceNow partners have trade off between enterprise who focus on innovation and deep practices and enterprise who are still dependent on legacy ITSM platforms. This dichotomy vouches for **the ITSM platform to evolve to ESM capability** bringing cost and resource efficiency but offering advanced capabilities
- **ESM unifies workflow across enterprise** - As vendors applied the rich practices within ITSM to the broader organization, **enterprise service management became a platform differentiator**. ESM platforms are **feature rich** with strong user and vendor communities, all contributing to the advancement and diversity of business-specific workflows

THE FORRESTER WAVE (Enterprise Service Management) Q4 2023



Source: Forrester Research Inc

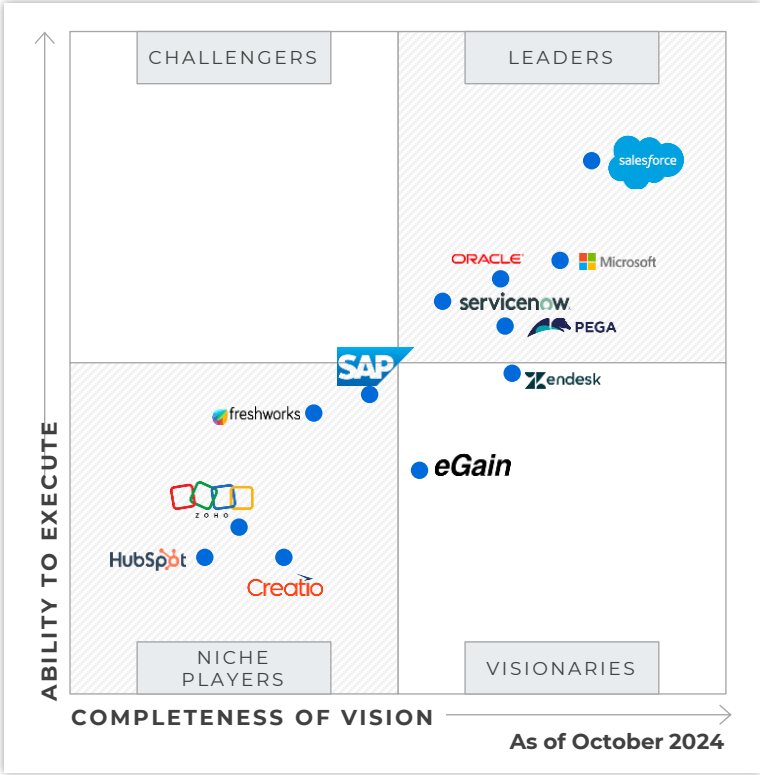
Collaborative workflows, technology & data integration, and adoption of GenAI and advanced AI use cases are evolving legacy ITSM platform to ESM

ITSM pivots into various enterprise functions

Given the mature nature of the ITSM platform market, much of its core functionality is commoditized. This has made it difficult for I&O leaders to differentiate these products

- **CRM CEC's mandatory capabilities** include case management, digital engagement, knowledge management, automated customer engagement, real-time continuous intelligence, workflow management, intelligent voice support, and business process management
- **Artificial intelligence** applications in IT service management as tools that augment **and extend ITSM** workflows using AI. These analyze ITSM data and metadata (primarily found in ITSM platforms) to provide **intelligent advice and actions on ITSM** practices and workflows

Gartner Magic Quadrant for CRM Customer Engagement Center (CEC), 2024



Gartner Magic Quadrant for Artificial Intelligence Applications in ITSM, 2024



Data Driven Operations at the Forefront

Major functions of Data driven Operations



AIOps



Service mapping



Visibility & monitoring



Configuration management database (CMDB)



ITOM cloud

Key Benefits of an AI-Driven, Data-Backed ITSM Strategy



Faster Incident Resolution – AI-powered automation reduces resolution times



Reduced IT Costs – Eliminates inefficiencies and optimizes resource allocation



Improved Employee Experience – Intelligent self-service and automation enhance service delivery



Stronger Security & Compliance – AI detects security threats and ensures regulatory compliance



Proactive IT Operations – Predictive analytics prevents issues before they escalate

Data driven operations and AI are differentiating service management functions and ITSM platforms



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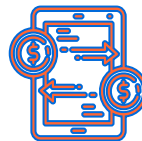
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SECTION 3

Deal Activity

ServiceNow Partners M&A Deal Activity – 2021-2024 (\$)



Deal overview

48

Transactions

2.5 Bn

Total disclosed deal size

720 Mn

Largest single deal transaction



Corporate deals

24

Transactions

2.2 Bn

Total disclosed deal size

720 Mn

Largest single deal transaction



Private equity

14

Transactions

293 Mn

Total disclosed deal size

293 Mn

Largest single deal transaction



Venture capital

10

Transactions

65.6 Mn

Total disclosed deal size

21 Mn

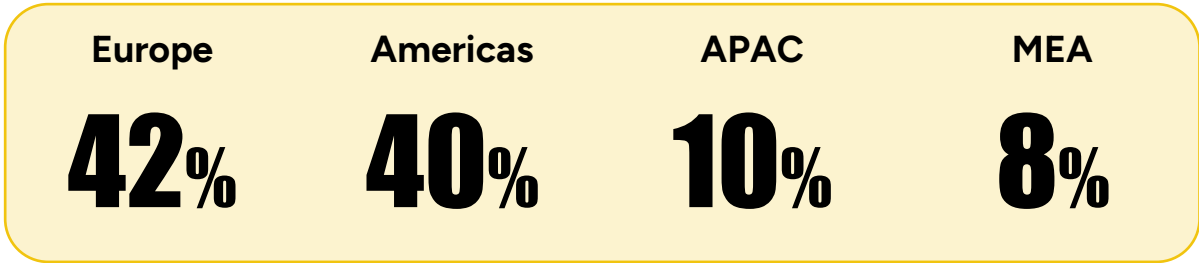
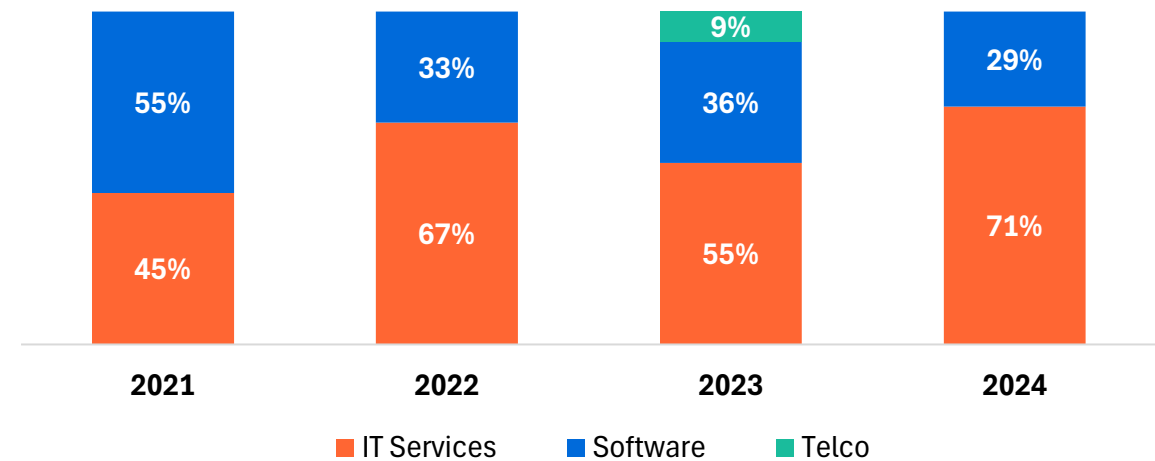
Largest single deal transaction

Corporate and PE deals make the most of ServiceNow deals realizing the long-term investment value proposition

Source: TH Global Capital M&A Tracker 2025

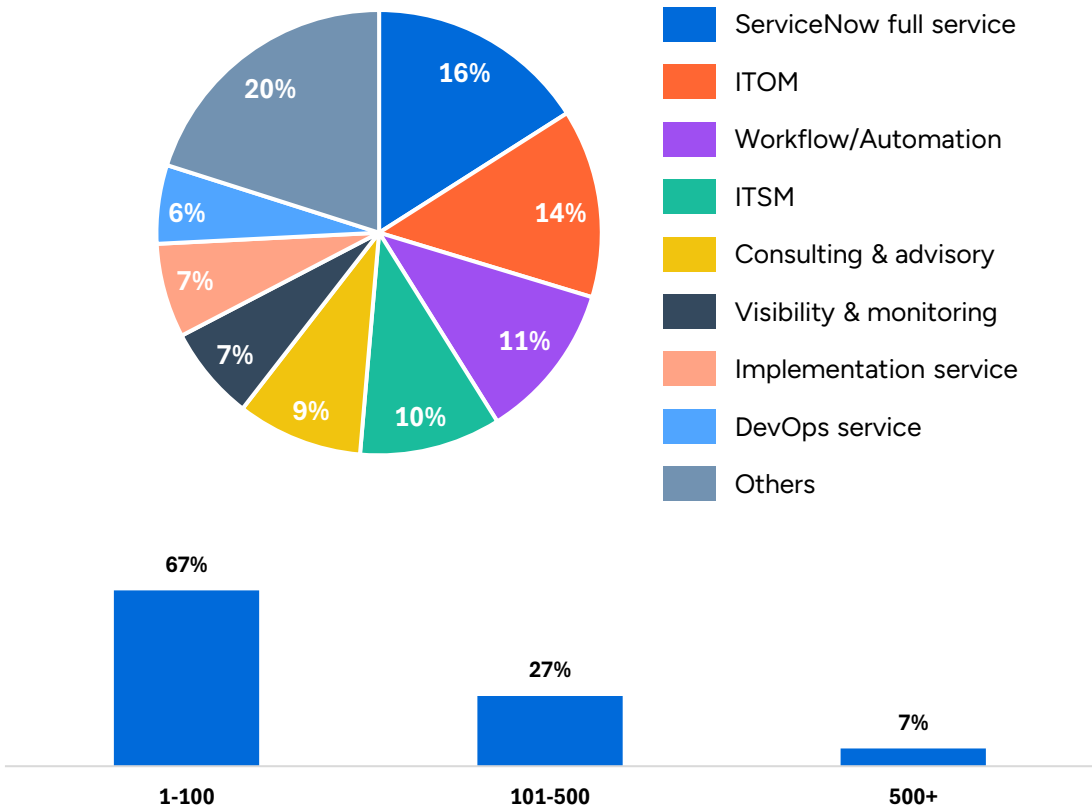
ServiceNow Target Segments – 2021-2024

Target Type and Region (%), 2021-2024



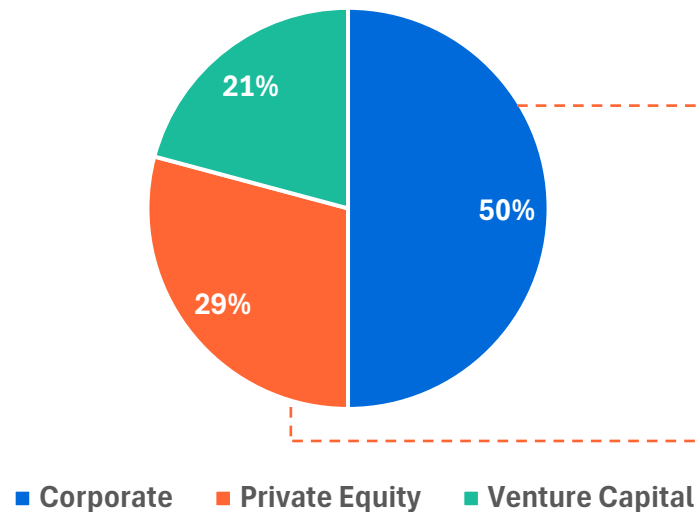
Europe and Americas had the most deal activities and the smaller employee (1-100) partner segment made the preferred target with ITOM, automation, ITSM and comprehensive ServiceNow capabilities

Target Type by ServiceNow Capabilities and Employee Size (%), 2021-2024



ServiceNow Partner Buyer Segments – 2021-2024

Deal Type Share (%), 2021-2024



Global elite partners are adding capabilities by acquiring elite partners	
Private Equity (PE) firms are seeking new opportunities from the platforms growth under new technology adoption and migration	

Top Buyer Rationale

44% Strategic

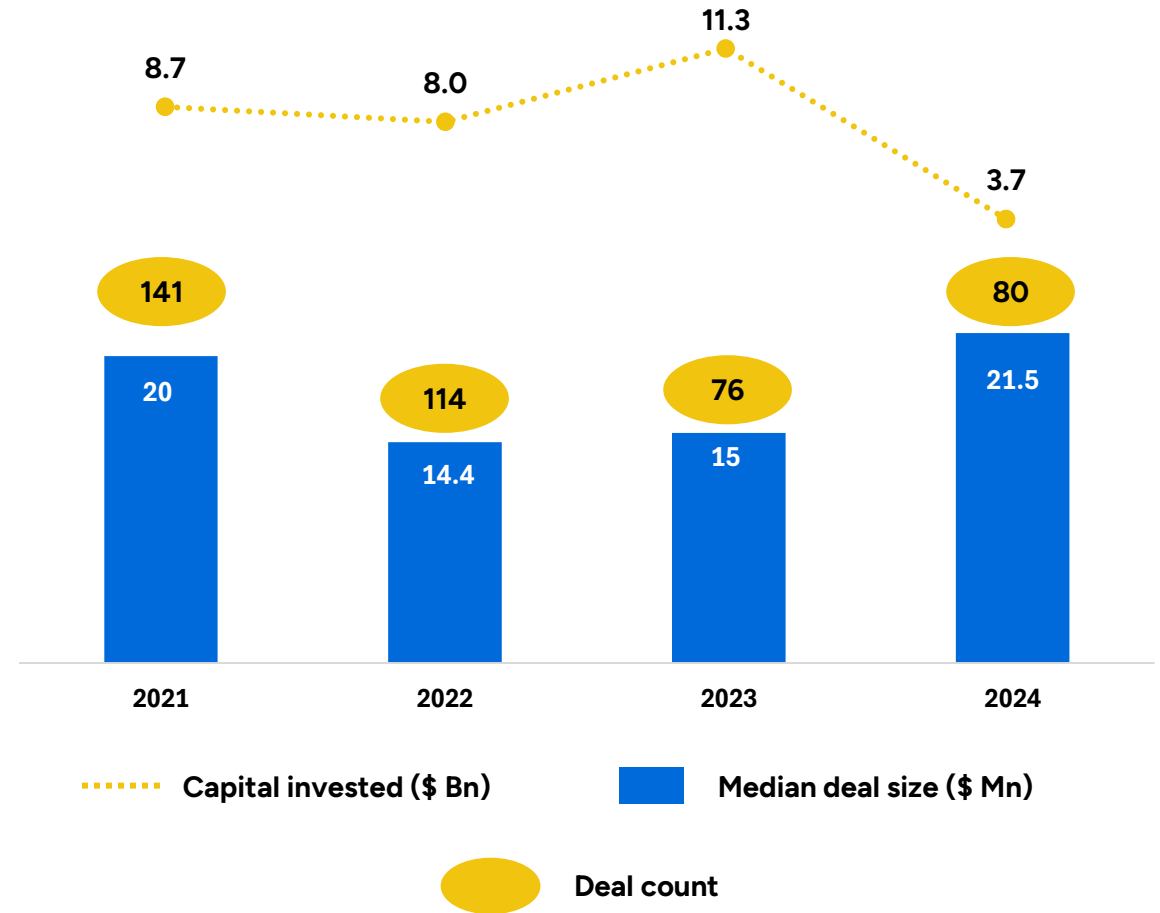
21% Market expansion

19% Service enhancement

Historically, PE and venture capital remained keen investors at par with corporate but off late corporates and PE deals led the market

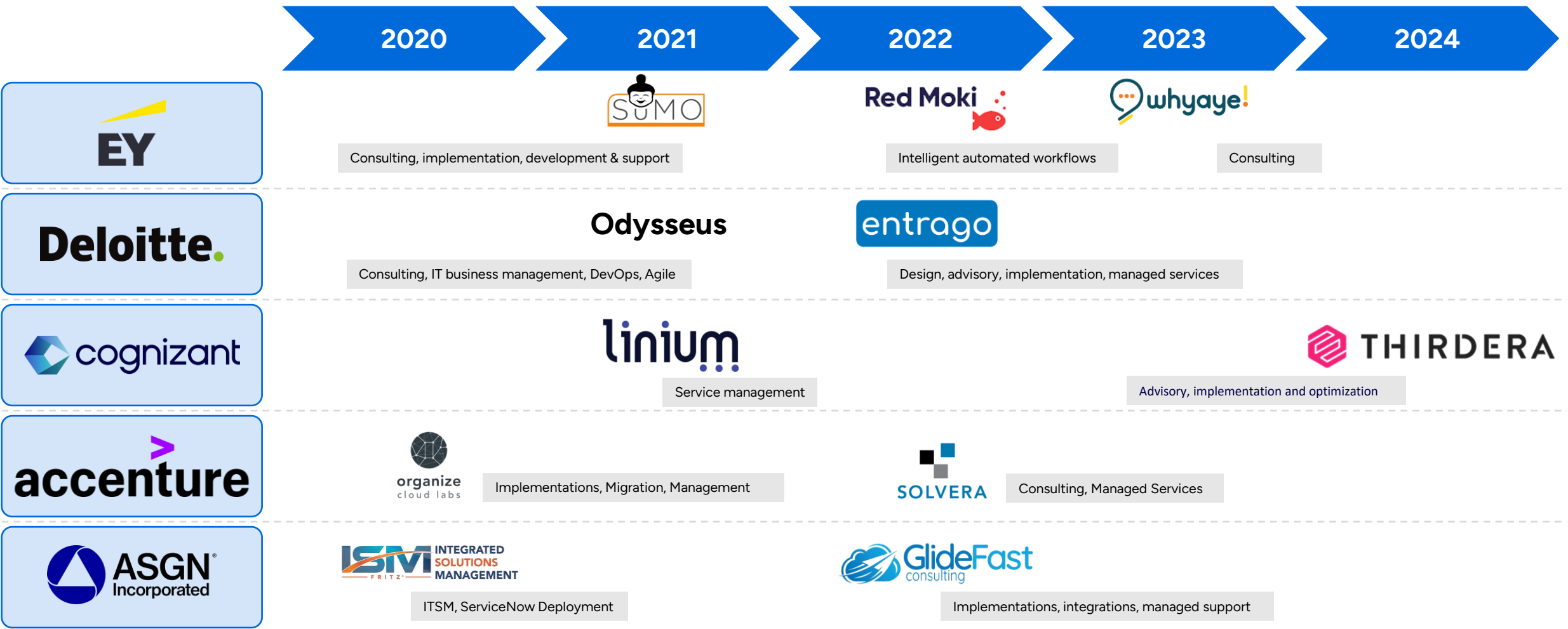
Median Deal Size and Capital Invested – 2021-2024

- 2024 witnessed a rise in transaction count, despite a year-over-year drop in investment value
- ServiceNow partner deals witnessed increased median deal size to \$21.5 Mn in 2024, marking a 43% growth YoY
- While 2024 saw fewer deals compared to most historical time periods, it showed marginal growth of 5% compared to 2023 deal count
- Total capital investment dropped to \$3.7 Bn in 2024, down from \$11.3 Bn in 2023



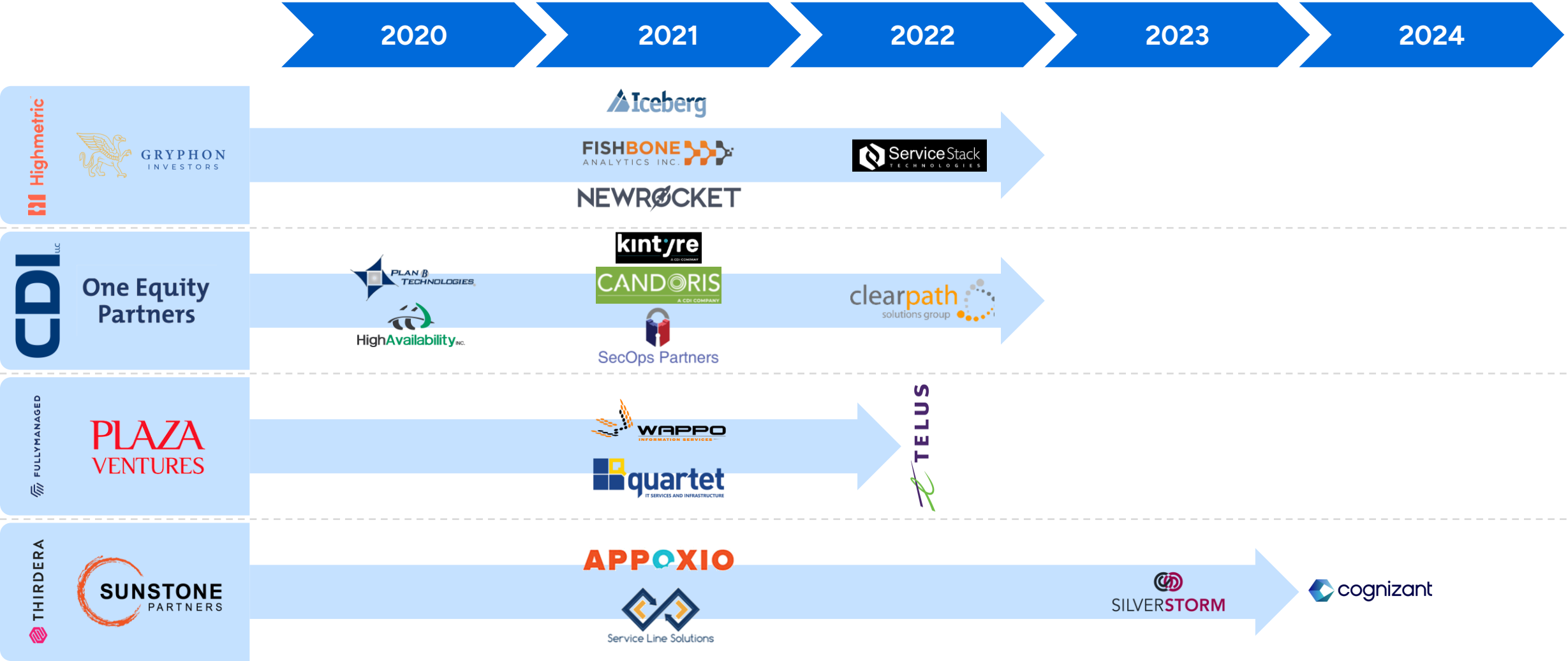
Corporate and PE investors have been active investing in elite partners and in those providing niche ServiceNow capabilities across ITOM and ITSM

ServiceNow Partner Strategic Acquisitions – 2020-2024



Elite partners were seen more attractive targets to enhance ServiceNow capabilities

ServiceNow Partner PE Backed acquisitions – 2020-2024



PE firms adopted buy and build strategies, and few partners even evolved to global elite partners

Deal Activity

Select Deals – 2021-2024 (1/2)

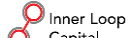
Date	Target	Buyer	ServiceNow Capabilities	Deal Size (\$ Mn)	Target HQ
Strategics					
11-Dec-24			ServiceNow endpoint automation	720.00	Europe
08-Oct-24		 	ServiceNow		Americas
01-Aug-24			ITOM, ITSM, SecOps, ITAM		Europe
01-May-24			ServiceNow	265.00	Americas
19-Mar-24			ServiceNow consulting, development, maintenance, implementation, ITOM		Asia
22-Jan-24			ITSM	430.00	Americas
15-Nov-23			ServiceNow deployment		Asia
27-Sep-23			ITSM, ITOM		Europe
17-May-23			Advisory, ITOM		Americas
12-May-23			Consulting		Europe
04-May-23			Workflow automation, cloud managed service		Americas
03-May-23			Configuration management, Data management		Europe

Date	Target	Buyer	ServiceNow Capabilities	Deal Size (\$ Mn)	Target HQ
Strategics					
02-May-23			Advisory, cloud infrastructure		Europe
12-Jan-23			Implementations, integrations, managed support, and application development		Europe
12-Jan-23			Workflow automation, digital transformation		Europe
01-Nov-22			ServiceNow		Europe
11-Oct-22			Intelligent automation, ServiceNow implementation		Asia
04-Oct-22			ServiceNow		Europe
25-Jul-22			Consulting, implementation, MSP		Americas
07-Jul-22			ServiceNow consulting, advisory, service delivery	150.00	Oceania
07-May-22			Workflow automation platform, ITOM		Europe
04-Apr-22			SecOps, ITSM, ITOM, ITBM		Americas
15-Jun-21			Performance management	512.00	Americas
31-Jan-21			ITOM	85.00	Americas

Deal Activity

Select Deals – 2021-2024 (2/2)

Date	Target	Buyer	ServiceNow Capabilities	Deal Size (\$ Mn)	Target HQ
Private Equity					
11-Nov-24	 CONTENDER SOLUTIONS	 PRESIDIO	ITSM, ITOM		Americas
31-Jul-24	 eraneos	 devoteam	Workflow automation		Europe
30-May-24	 inMorphis Experience wow!	 CAPITAL SQUARE PARTNERS  servicenow	ITSM, ITOM, security		Asia
14-May-24	 procori Part of Devoteam	 devoteam  KKR	ITSM		Europe
03-May-24	 core.x	 NEWSPRING	ITOM		Americas
24-Jan-24	 ALPHA SERVE	 Tempo	Data management		Europe
27-Jul-22	 TOW80 ServiceNow Certified	 DGS BUILDING THE FUTURE	Consulting, implementation, support and training		Europe
22-Sep-21	 qbilon APPOXIO	 evergreen	Helpdesk service		Americas
09-Jun-21	 1E	 TeamViewer	ServiceNow endpoint automation, endpoint Mgt	293.66	Europe
28-May-21	 FISHBONE ANALYTICS INC.	 Highmetric	Business process workflow		Americas
05-Apr-21	 CLOUDPIRES	 GlideFast consulting	Application development, ITOM		Americas
24-Feb-21	 abhra automation realized	 U - S T	Implementation, extension, integration and application development services		Americas
26-Jan-21	 cerna get it done	 evergreen	Automation, ITOM, ITSM		Americas
26-Jan-21	 THIRDERA	 cognizant	ITSM		Americas

Date	Target	Buyer	ServiceNow Capabilities	Deal Size (\$ Mn)	Target HQ
Venture Capital					
01-Oct-24	 xtype	 COLUMBIA CAPITAL  Inner Loop Capital	ServiceNow visibility, automation	21.00	Middle East
NORWEST					
07-Aug-24	 Allstacks	 Clutch  CreativeCo  Companion VENTURES	DevOps, Monitoring	10.00	Americas
24-Oct-23	 xtype	 COLUMBIA CAPITAL  Inner Loop Capital  SAAS VENTURES	DevOps, Monitoring	5.00	Middle East
31-Mar-23	 QualityClouds	 ADARA VENTURES  aldea UK Government	ServiceNow	9.43	Europe
14-Oct-22	 Allstacks	[2ndF]  Clutch ATLASSIAN Ventures	DevOps, Monitoring	12.69	Americas
14-Sep-22	 xtype	 COLUMBIA CAPITAL  Inner Loop Capital  SAAS VENTURES	DevOps, Monitoring	5.00	Middle East
14-Jun-22	 qbilon	 Bayern Kapital Venture Capital für Bayern  [TIDUS Beteiligungs holding]	Configuration management, Data management		Europe
01-Feb-22	 QualityClouds	[Meridia]	ServiceNow	0.27	Europe
01-Sep-21	 xtype	 Inner Loop Capital  SAAS VENTURES  STONEMILL VENTURES	Automation, visibility, DevOps	0.80	Middle East
31-Mar-21	 QualityClouds	 ADARA VENTURES  Intellectium Business Acceleration [Meridia]	ServiceNow	1.39	Europe

Most ServiceNow Transactions Completed Globally

Voice of the Customers for our ServiceNow expertise

MAR 2025  TMLABS Is being acquired by Coforge ServiceNow Consulting	FEB 2024  PLAT4MATION Private Equity buyout KEENSIGHT CAPITAL servicenow ServiceNow Consulting & IP	NOV 2023  unifii Has been acquired by inetum BainCapital PORTFOLIO COMPANY ServiceNow Consulting & Managed Services	FEB 2023  Humans4Help Has been acquired by ALAN ALLMAN ASSOCIATES Hyperautomation, BPM, AI & Data Science	AUG 2022  enable Has been acquired by FUJITSU ServiceNow Consulting & IP	JUN 2022  doitwise Has been acquired by inetum ServiceNow Consulting	OCT 2020  guidevision Has been acquired by Infosys ServiceNow Consulting	NOV 2018  TESM Has been acquired by DXC TECHNOLOGY ServiceNow Consulting	NOV 2018  BusinessNow Has been acquired by DXC TECHNOLOGY ServiceNow Consulting
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- Extensive experience in the ServiceNow ecosystem, with deep global buyer relationships
- Robust structured process with ability to deliver multiple strong offers from leading strategic buyers
- Hands-on support throughout the transaction providing clear, consistent advice and taking on much of the heavy lifting



Tobias Schwartz
Co-founder, TMLabs

- Unmatched understanding of the ServiceNow and digital transformation ecosystem, global investor network, and commitment to excellence
- Maximized the outcome and strategic fit through a carefully thought-out market approach that ensured certainty of completion
- Unparalleled ability to align our strategic goals with the right partner, delivering a result that exceeded our highest expectations



Elmer De Valk
CEO, Plat4mation

- Track record and deep understanding of the ServiceNow and Digital Transformation market
- Knowledge of the key strategic and Private Equity players globally
- Outcome with tremendous strategic and cultural synergies



Stephen Mamelok
Managing Director, Unifii

TH Global Capital Transactions

TH Global Capital exclusively focused on investment banking in Technology Services, BPM, Consulting, Software and Healthcare and is the digital transformation advisor of choice globally. Over 24 years, TH has built deep expertise in digital platforms, with global reach and extensive strategic buyer and private equity relationships to help clients navigate through a sale and/or capital raise process, and to secure premium valuations.



Best M&A Advisory Firm of the Year 2024



Cross-Border M&A Consultancy of the Year 2024

AI

M&A Awards 2024

Winner!

Global Technology M&A Advisory Firm of the Year 2024

AI

M&A Awards 2024

Winner!

Client Service Excellence Award 2024



Boutique Investment Banking Company of the Year 2024

APR 2025  Has been acquired by  Cybersecurity	APR 2025  Has been acquired by  ServiceNow Consulting	APR 2025  Has been acquired by  Payments Software, Fintech & Regtech	FEB 2025  Has been acquired by  PORTFOLIO COMPANY Salesforce Consulting	JAN 2025  Has been acquired by  PORTFOLIO COMPANY Low Code Product Engineering & AWS	NOV 2024  Has been acquired by  Digital Transformation, Innovation & Experience	NOV 2024  Has been acquired by  PORTFOLIO COMPANY Financial Services Product Engineering	OCT 2024  Has been acquired by  Salesforce Consulting	OCT 2024  Will be acquired by  Digital Engineering & Microsoft Consulting	OCT 2024  Will be acquired by  AI and Data Science
AUG 2024  Has been acquired by  MedTech Product Design & Engineering	JUL 2024  Has been acquired by  IT Outsourcing & BPO	JUN 2024  Merger with  PORTFOLIO COMPANY Digital Commerce & Digital Marketing	APR 2024  Has been acquired by  PORTFOLIO COMPANY Digital Design & Innovation Consulting	APR 2024  Has been acquired by  Financial Services Management Consulting	MAR 2024  Has been acquired by  Digital Product Engineering	MAR 2024  Has been acquired by  Marketing Automation	FEB 2024  Has been acquired by  PORTFOLIO COMPANY BPM and Automation	FEB 2024  Majority acquired by  Insurance Technology Services & IP	CLICK HERE TO VIEW ALL TRANSACTIONS



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