



Date: 11th January 2026

To
The Manager – Listing Compliance
BSE Limited
Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai – 400001
Scrip Code: 532368

To
The Manager – Listing Compliance
National Stock Exchange of India Limited
Exchange Plaza, C-1, Block G,
Bandra Kurla Complex, Bandra (E),
Mumbai – 400051
Symbol: BCG

Subject: Explanatory Presentation - Digital Marketing Structure

Dear Sir / Madam,

Further to the Company's intimation dated 5 January 2026, pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, the Company wishes to inform the Exchange(s) that it is sharing the next explanatory presentation in the previously announced series.

This presentation provides background information on the digital advertising market structure, operating mechanisms, and industry context, and is intended solely as reference material.

The presentation does not contain any forward-looking statements, financial guidance, or projections, and is not intended to address any specific market conditions or performance expectations.

Further materials in this series will be shared as and when finalized.

Thanking you,

For Brightcom Group Limited
Raghunath Allamsetty
Executive Director
DIN: 00060018





brightcom
group
Connecting dots

ADTECH MARKET OVERVIEW

GLOBAL ADVERTISING MARKET SIZE

Advertising is one of the largest, most persistent global industries.

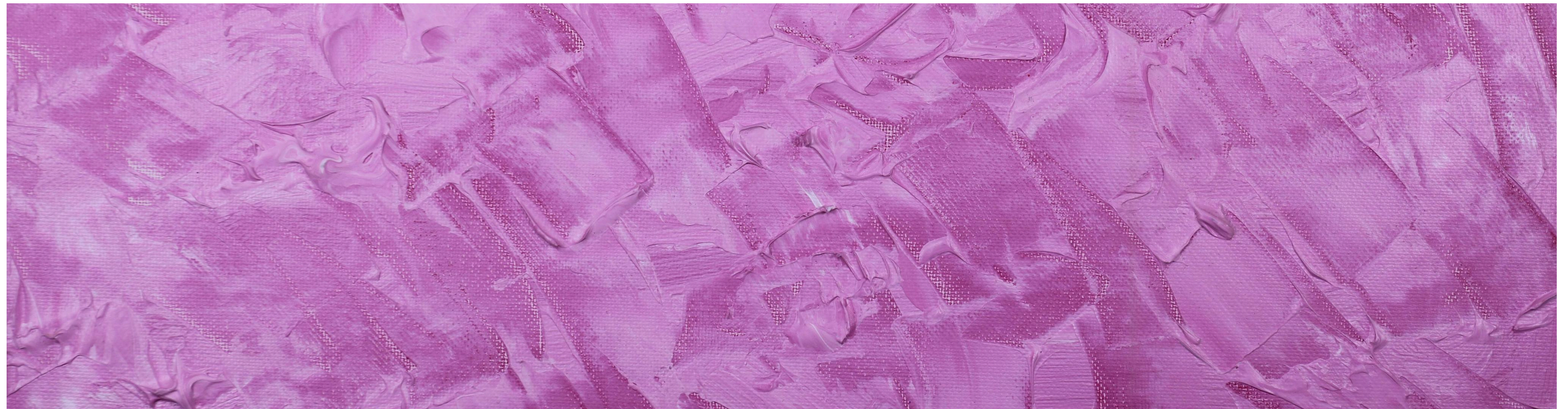
Every consumer-facing business relies on advertising to attract customers.

Global advertising expenditure has exceeded \$1.5 trillion.



GLOBAL ADVERTISING SPEND INCLUDES
ALL PAID MEDIA USED BY BUSINESSES TO
REACH CONSUMERS ACROSS:

-  Digital environments (web, mobile, streaming, platforms)
-  Traditional environments (television, print, radio, outdoor)



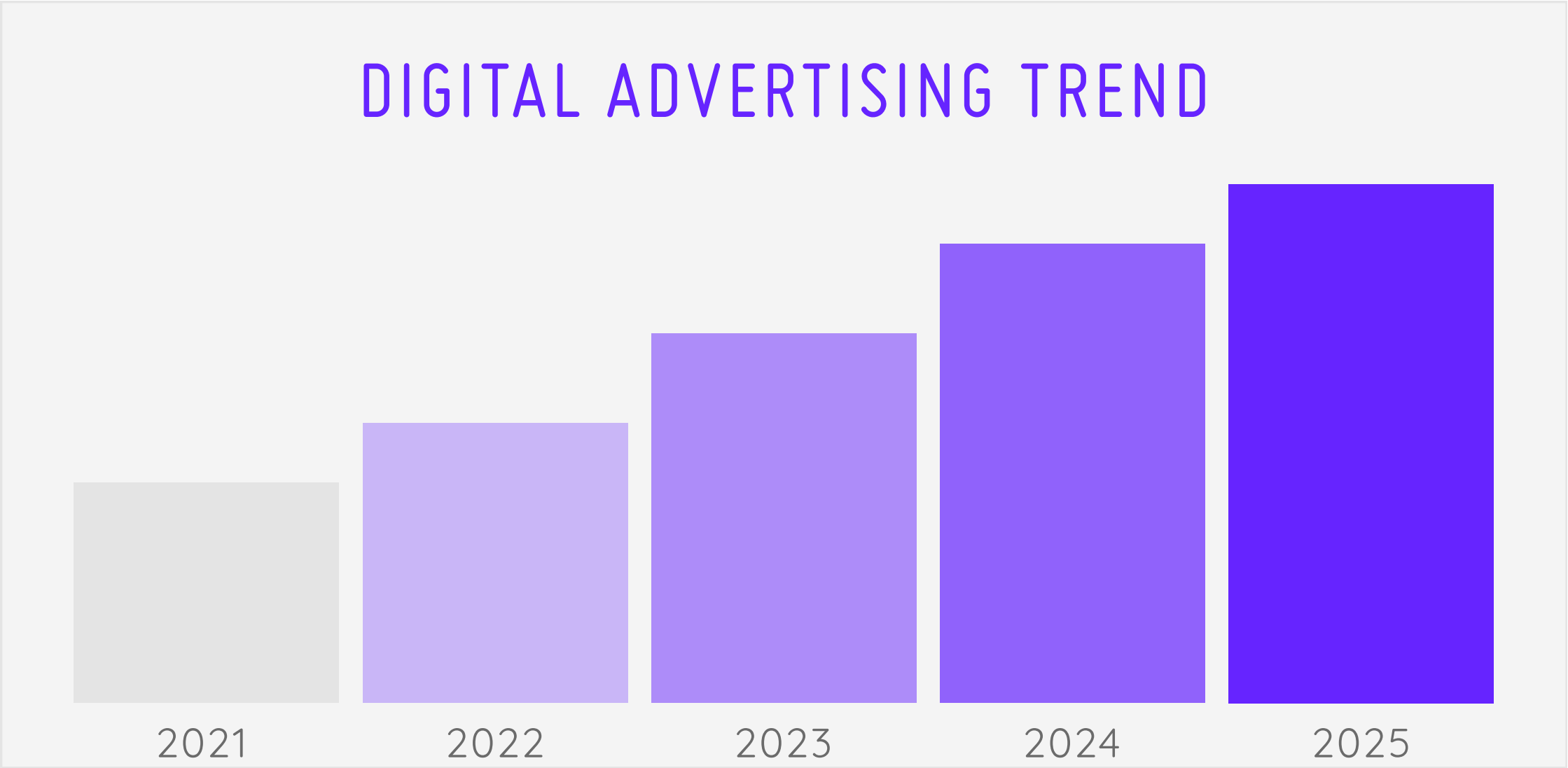
DIGITAL ADVERTISING: THE CENTER OF GRAVITY

Digital advertising now represents the majority of global advertising spend.

DEPENDING ON METHODOLOGY:

Digital accounts for roughly 70% or more of total global advertising.

Nearly all incremental growth in advertising is digital.



WHAT MAKES DIGITAL ADVERTISING DIFFERENT

Digital advertising differs structurally from traditional media because it is:

 Measurable
(impressions, clicks, conversions)

 Addressable
(audience-level targeting)

 Automated
(real-time decisioning)

 Performance-linked
(outcomes drive budgets)

HOW THE DIGITAL ADVERTISING MARKET OPERATES

The market functions through software platforms rather than manual negotiation. At a high level, the ecosystem consists of:



ADVERTISERS



PUBLISHERS



PLATFORMS

PROGRAMMATIC EXECUTION (MARKET MECHANISM)


Most digital advertising today is executed through programmatic systems, which:

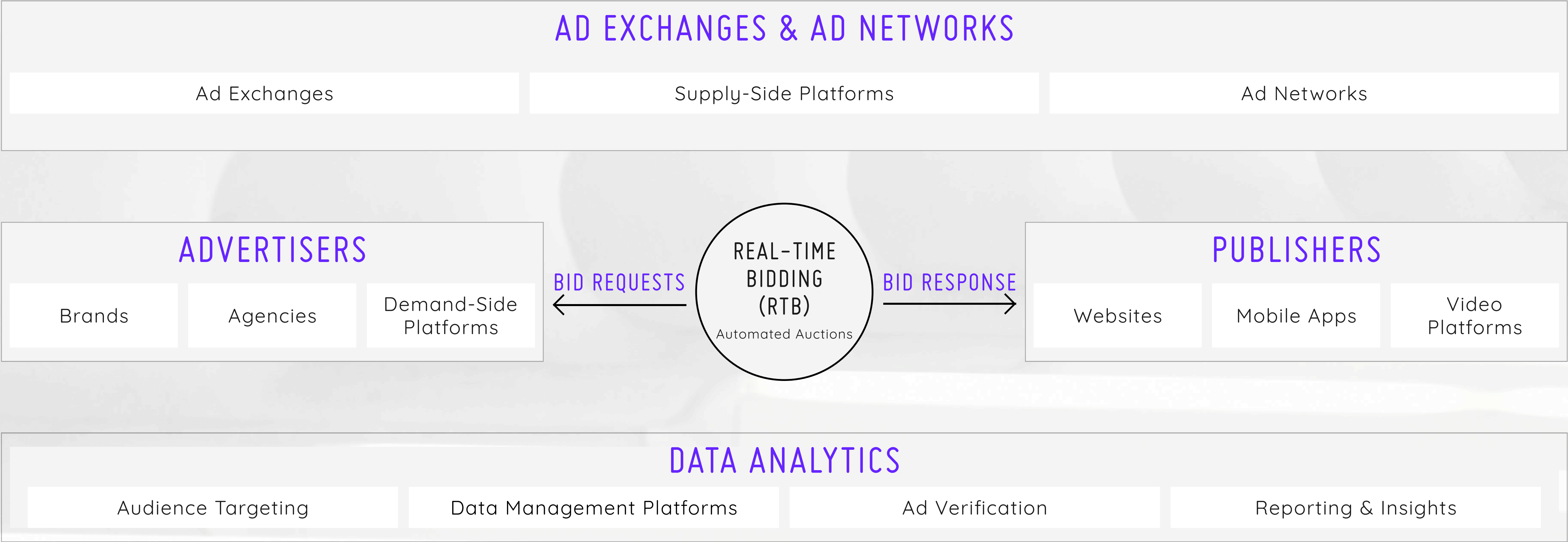
Match advertiser demand with publisher supply

Optimize continuously based on data

Operate in milliseconds

Price inventory dynamically

 Programmatic systems enable real-time bidding and automated optimization at scale, processing billions of transactions daily.



AUTOMATION & AI IN ADVERTISING

The adoption of AI and machine learning is a response to the market's scale and complexity, rather than a matter of choice.

The current landscape highlights digital marketing functions where AI is already in production use.

Market participants are also advancing several AI-led initiatives aimed at simplification, many of which remain under development and are yet to reach commercial scale.

AUTOMATION IS CENTRAL TO MODERN ADVERTISING:

- Budget allocation
- Targeting
- Bidding strategies
- Forecasting
- Optimization
- Creative selection



EFFICIENCY & MARKET STRUCTURE

AS DIGITAL ADVERTISING MATURES:

- Buyers are optimizing for efficiency
- Supply chains are simplified

THE MARKET INCREASINGLY REWARDS:

Scale

Transparency

Operational efficiency

Reliable execution

ADVERTISERS INCREASINGLY REQUIRE:

Fraud prevention

Brand-safe environments

Viewability standards

Transparent measurement



Low-quality supply and opaque paths are penalized by the market.

This has shifted value toward platforms and environments that meet institutional buyer standards.

Advertisers are looking for high conversion rate → leading to higher inventory.

Publishers are looking to maximize their monetization.

MAJOR DIGITAL ADVERTISING FORMATS

THE MARKET IS DISTRIBUTED ACROSS SEVERAL FORMATS:



Display
Banner, rich media



Video
Short-form, in-stream, out-stream



Search
Intent-based advertising



Social
Platform-native formats



Streaming / CTV
Connected TV



Retail Media
Retail media environments



Email
Direct, lifecycle, CRM-driven advertising



Audio
Streaming audio, podcasts



Digital Out-of-Home (DOOH)
Programmatic outdoor and place-based screens

COMPETITIVE LANDSCAPE

The digital advertising ecosystem includes:

- Specialized technology providers
- Media and monetization platforms

Over time, value tends to concentrate among participants that:

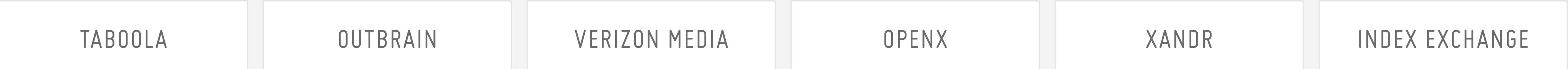
- Operate at scale
- Integrate deeply into market workflows
- Provide measurable outcomes

KEY MARKET PARTICIPANTS

TECHNOLOGY PROVIDERS



REGIONAL & SPECIALIZED PLATFORMS



Market structure characterized by concentration at scale combined with specialized providers serving specific needs.

BRIGHTCOM'S ROLE IN THE DIGITAL ADVERTISING MARKET

Brightcom operates within the digital advertising ecosystem as a technology platform supporting large-scale, programmatic advertising execution.

DEMAND EXECUTION



Advertising budgets from brands and agencies are deployed into digital inventory through automated systems.

SUPPLY ENABLEMENT



Digital inventory across publishers, formats, and geographies is made available for monetization.

TRANSACTION PROCESSING



Advertising impressions are priced, matched, and executed programmatically in real time.

OUTCOME MEASUREMENT & OPTIMIZATION



Campaign performance is measured continuously, enabling ongoing allocation and optimization.

As digital advertising has shifted toward automation, real-time pricing, and performance-linked spend, platforms performing these functions have become central to the market structure.

LONG-TERM MARKET OUTLOOK

PROGRAMMATIC DOMINATES:
~85–90% of display and video spend traded programmatically by 2026.

HYPERPERSONALIZATION ADS:
due to the increasing use of AI

DIGITAL ADVERTISING GROWTH CONTINUES:
projected global digital ad spend CAGR ~8–10% through 2028.

DIGITAL SHARE OF TOTAL ADVERTISING:
expected to exceed ~75% of total global ad dollars by 2026–2027.

VIDEO & STREAMING EXPANSION:
CTV/online video ad spend growing ~15–20% annually.

RETAIL MEDIA ACCELERATION:
retail media networks forecast to double share of digital budgets by 2027.

MEASUREMENT EVOLUTION:
increased investment in cross-platform measurement and privacy-safe attribution.

