ISG Investor Presentation

September 2026

Forward-Looking Statements

This communication contains “forward-looking statements” which represent the current expectations and beliefs of management of ISG concerning future events and their potential effects. Statements contained herein including words such as “anticipate,” “believe,” “contemplate,” “plan,” “estimate,” “target,” “expect,” “intend,” “will,” “continue,” “should,” “may,” and other similar expressions, are “forward-looking statements” under the Private Securities Litigation Reform Act of 1995. These forward-looking statements are not guarantees of future results and are subject to certain risks and uncertainties that could cause actual results to differ materially from those anticipated. Those risks relate to inherent business, economic and competitive uncertainties and contingencies relating to the businesses of ISG and its subsidiaries including without limitation: (1) failure to secure new engagements or loss of important clients; (2) ability to hire and retain enough qualified employees to support operations; (3) ability to maintain or increase billing and utilization rates; (4) management of growth; (5) success of expansion internationally; (6) competition; (7) ability to move the product mix into higher margin businesses; (8) general political and social conditions such as war, political unrest and terrorism; (9) healthcare and benefit cost management; (10) ability to protect ISG and its subsidiaries’ intellectual property or data and the intellectual property or data of others; (11) currency fluctuations and exchange rate adjustments; (12) ability to successfully consummate or integrate strategic acquisitions; (13) outbreaks of diseases, including coronavirus, or similar public health threats or fear of such an event; (14) clients’ termination, delay, or reduction in scope of engagements; (15) the effect of the divestiture of the automation unit on ISG’s relationships with its customers and suppliers and on its retained business generally; (16) the success of ISG’s focus on AI advisory and AI-powered platforms; (17) changes to trade policy, including new or increased tariffs and changing import/export regulations, and (18) potential employment-related claims. Certain of these and other applicable risks, cautionary statements and factors that could cause actual results to differ from ISG’s forward-looking statements are included in ISG’s filings with the U.S. Securities and Exchange Commission. ISG undertakes no obligation to update or revise any forward-looking statements to reflect subsequent events or circumstances.

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Who We Are

A global *AI-centered* technology research and advisory firm.

1,500 passionate professionals

Differentiated by the industry's deepest technology benchmark and contracts databases.

10 million real-world data points

Advising the world's top enterprises on how to achieve operational excellence through technology.

900 blue chip clients

$250M
Revenue

$116M
Recurring Revenue

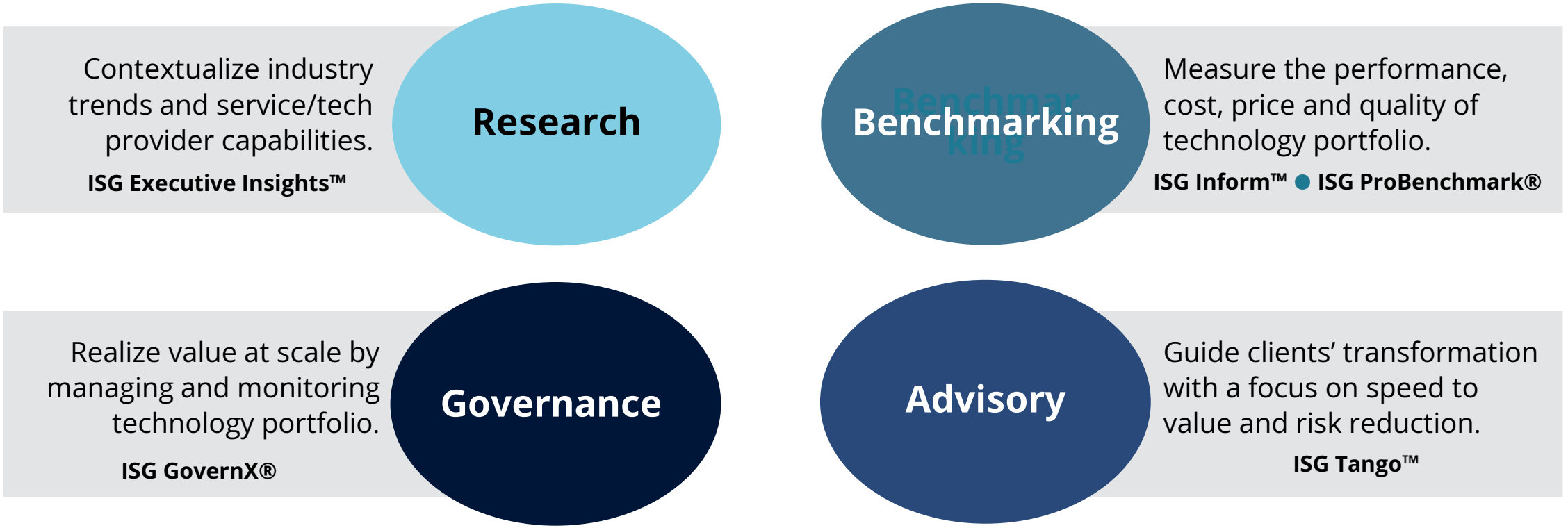
98%
Client Advocacy

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TTM as of June 30, 2026

What We Do

Using our data-centric and platform-based delivery model, we advise clients on how to achieve operational excellence and faster growth through technology.



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Proprietary Data is Our Differentiator

We leverage the industry's deepest technology benchmark and sourcing contract databases.

ISG Benchmarking Databases

The industry's most comprehensive database of technology cost, price, rates and performance metrics.

10 million data points

ISG Contract KnowledgeBase®

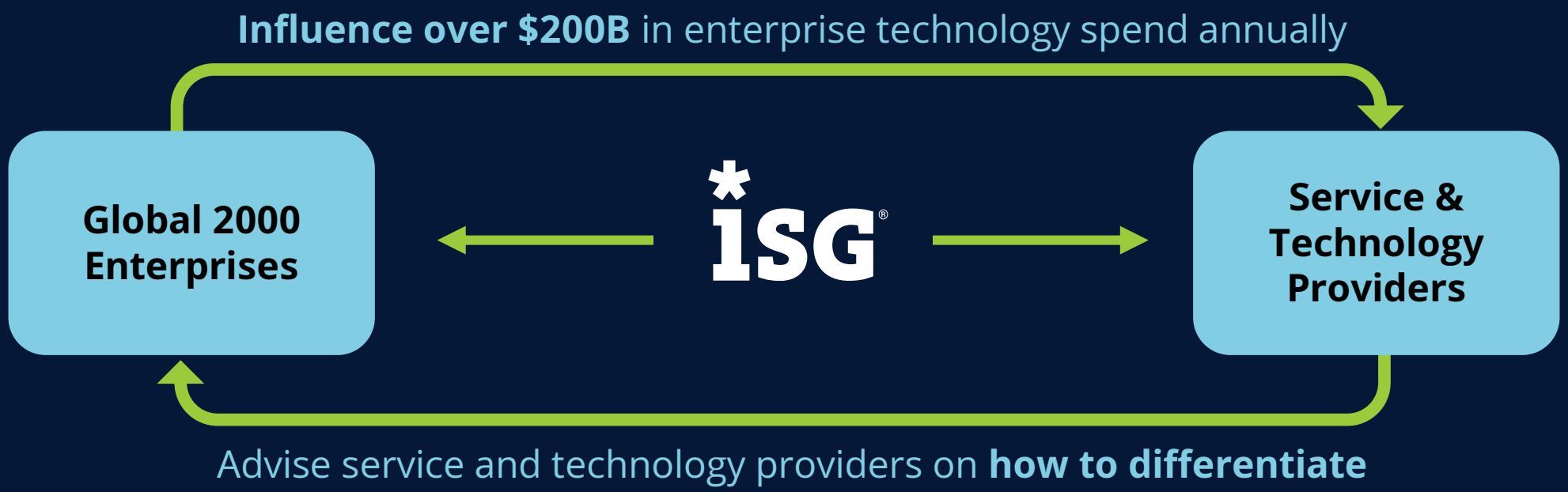
Authoritative repository of global sourcing contracts across regions, industries and business functions.

Based on real-world metrics, not surveys, creating a data moat difficult to replicate.

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Our Unique Position

ISG is a trusted, independent voice within the global technology ecosystem.



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Service & Technology Provider Ecosystem

Influencing billions of contract value each year in services, software and cloud for enterprises.

Managed Services Market
$165 billion TCV

Software & Cloud Market
$120 billion TCV

accenture · Capgemini · genpact · IBM · Infosys · TCS TATA CONSULTANCY SERVICES

aws · Microsoft · ORACLE · salesforce · SAP · servicenow

50% share of advised sourcing transactions; **advised 70%** of advised mega awards

On average reduce client's software spending **by 19%**; advised **largest ever cloud agreement** in Europe

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Source: ISG Index™
TCV = Total Contract Value

Our Advisory Services – Grounded in Deep Data Insights

AI
Optimize existing operations and build new revenue generating opportunities with AI technologies.

Benchmarking
Track and meet your price, cost, performance and quality objectives.

Business Processes
Transform general and administrative processes to deliver new efficiencies and unleash superior business value.

Cloud Advisory
From strategy to implementation to managed services, we help you define your Cloud journey.

Cognitive and Analytics
Accumulate data capital and monetize it effectively.

Cost Optimization
Drive greater value for your enterprise and get the most efficient and effective business operations and technology.

Cybersecurity
Transform your existing information security into an agile and vigilant operation to protect your enterprise.

Digital Engineering
Move into a differentiated position in a secured, intelligent and connected economy.

Future of Work
Integrate the best of digital, physical and human solutions.

HR Technology and Transformation
Engage the workforce of tomorrow and deliver value to the business in a new way.

Networks
Create an optimal, right-fit network services strategy that adds significant value to your business.

Organizational Change Management
Empower your people to realize benefits faster and increase productivity through technology usage.

Software
Optimize your strategic software suppliers and ecosystems.

Sourcing
Find the right partners and make the best deals. Sourcing, negotiating and contracting methodology, expertise and platform.

Governance (incl. AI)
Real-time visibility across vendors and contracts to strengthen oversite and ensure sustained value.

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Client Story:
Top Global Consumer Company

1. Services Requested

$3M

Enterprise-wide initiative to optimize technology, sourcing, and operational spend across global business functions.
$4B of spend

IT | Finance | HR | Marketing
Supply Chain | Global Consumer Care

Identified opportunities for operational efficiency, vendor consolidation, and digital modernization aligned to global growth objectives.

2. ISG Solutions

Tech Sourcing, Cost Optimization & Transformation

- Technology & sourcing optimization
- EBS and operating model transformation
- Transition management & governance support
- AI advisory
- Benchmarking & cost optimization
- Cloud, licensing & vendor mgmt. advisory
- Procurement modernization & GovernX® support

3. Value Realized

- $600,000,000 (15% of $4B spend)
- Enabled enterprise-wide transformation and governance initiatives incorporating AI-enabled market solutions

$8M

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Recurring & Re-Occurring Revenue

Data-enabled platforms enable us to create long-term relationships with clients.

Recurring revenue:

46%

of overall firm revenue

Including research, platforms and multiyear contracts

Re-Occurring revenue:

84%

of overall firm revenue

Same clients, prior year

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TTM as of June 30, 2026

Serving Global Leaders Across 20 Industries

98% of clients would recommend ISG.

13	13	12	11	10
Health Sciences	Energy & Utilities	Manufacturing	Technology	BFSI

of the top 15 Fortune 2000 firms

ABBOTT
aramco
BMW GROUP
Alphabet
Allianz
NOVARTIS
ExxonMobil
CATERPILLAR
BANK OF AMERICA
Roche
verizon
BNP PARIBAS

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The AI Opportunity

Bringing our trusted, independent voice to the biggest tech shift in a generation.



Over half of enterprises indicate there is nothing more important they could be working on than AI.

Source: ISG Market Lens™

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Artificial Intelligence

"ISG is akin to a fiduciary for us as a client – a trusted, independent third-party with expertise on how to build our GenAI approach."

TOP U.S. FINANCIAL INSTITUTION

ISG is accelerating client transformations to an AI-centric enterprise.

AI Advisory	AI Research	AI for ISG
Strategy	Software	Platforms
Sourcing	Providers	Smart Contracting
Adoption	Enterprises	ISG GPT
Transformation		
Governance		

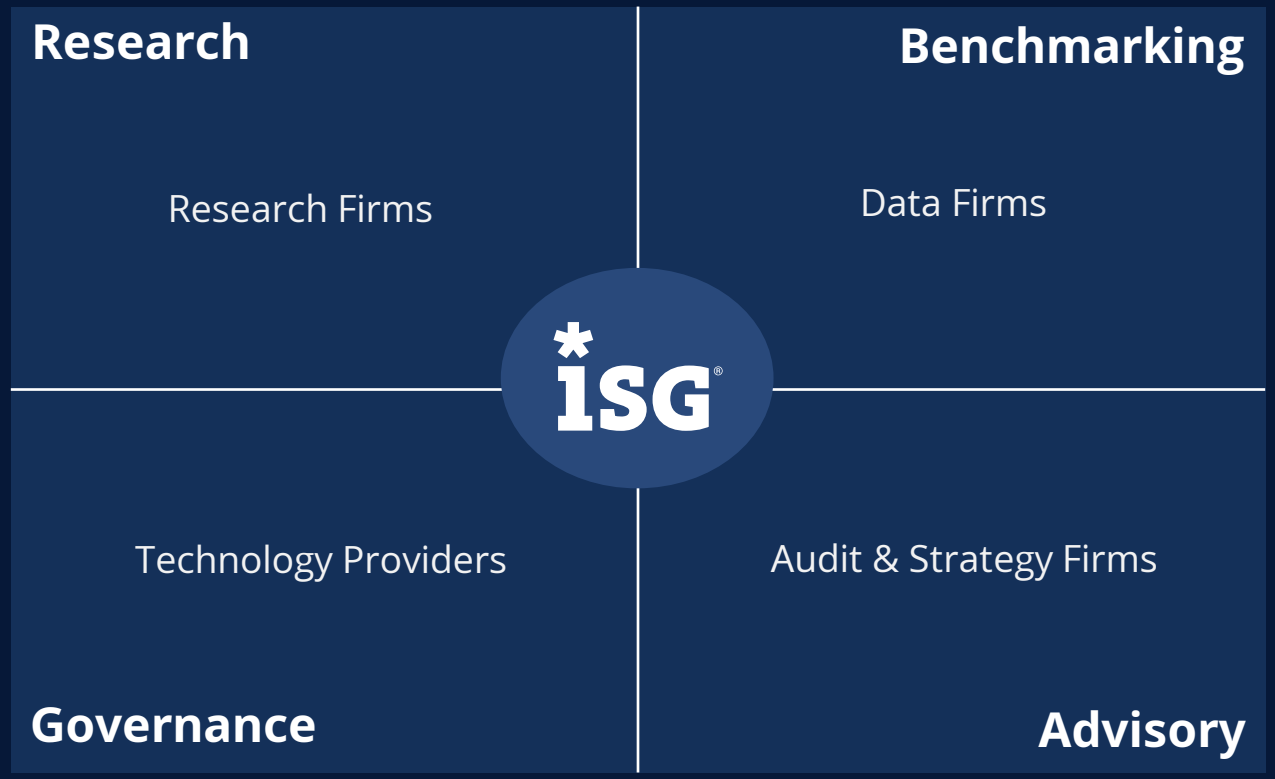
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Competitive Landscape

#1

Competitor is Internal Procurement Departments

No one competitor matches the breadth of ISG offerings.

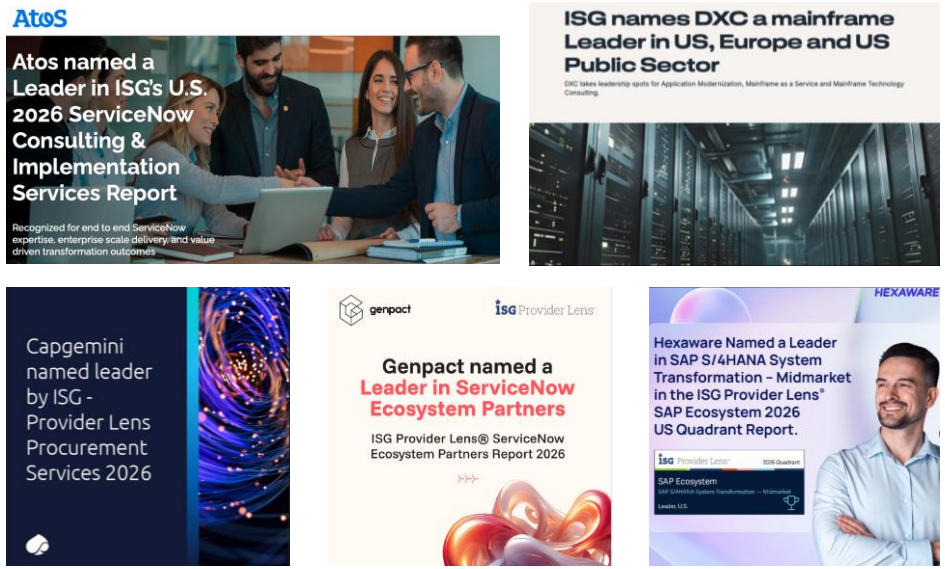


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ISG is the Authoritative Voice for the Industry

"The ISG Index is one of the most important channel checks for our research on global IT services."

RISHI JHUNJHUNWALA,
HEAD OF TECHNOLOGY RESEARCH, IIFL



ISG recognition is prized by industry leaders across **managed services**, **software** and **cloud** markets.

ISG Index™



Nearly **30,000** industry stakeholders have attended the ISG Index™ call over the past **94 consecutive** quarters.

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Culture and Values

- Trusted and long-term partnerships with clients
- Business builders
- Born virtual
- Operational excellence



FORTUNE AMERICA'S MOST INNOVATIVE COMPANIES 2026 statista

Forbes AMERICA'S BEST MANAGEMENT CONSULTING FIRMS POWERED BY statista 2026

BEST COMPANIES TO WORK FOR U.S.News & WORLD REPORT 2025-2026

Great Place To Work® Certified DEC 2025 - DEC 2026 INDIA™

Great Place To Work® Certified APR 2026–APR 2027 AUS™

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Our Growth Plan

- Drive **recurring revenue streams**, with a continued focus on data and platforms.
- **Lead with AI** in Research and Advisory; accelerate AI for ISG.
- Disrupt the sourcing market with AI-powered **ISG Tango™**.
- Continue to grow our **digital and business transformation advisory** business.
- Expand our suite of **enterprise advisory services,** including change management, cost optimization, TaaS & HCM.
- Leverage our **ISG NEXT** operating model utilizing our **ISG iFlex** delivery model to drive productivity, speed & profitability.

Adjusted EBITDA

1.5x Revenue

Target mid teens

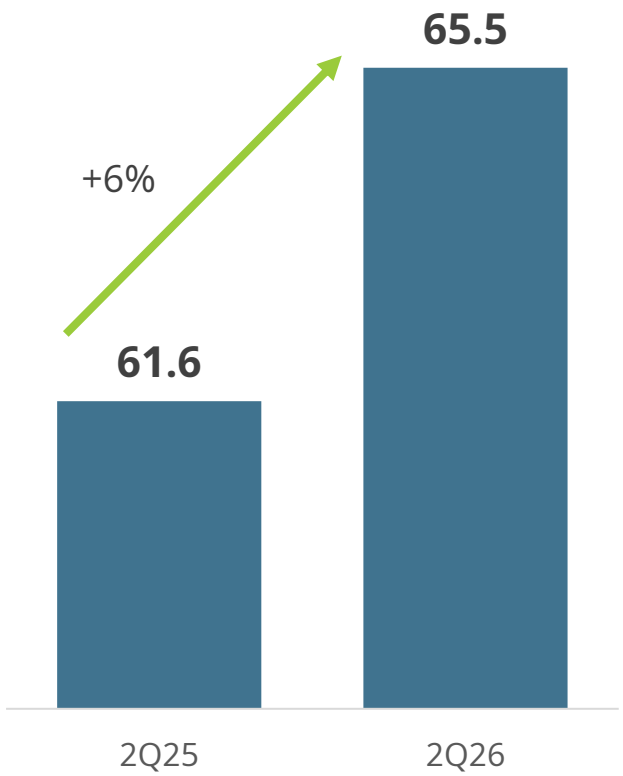
Recurring Revenues

50% of Total Revenues

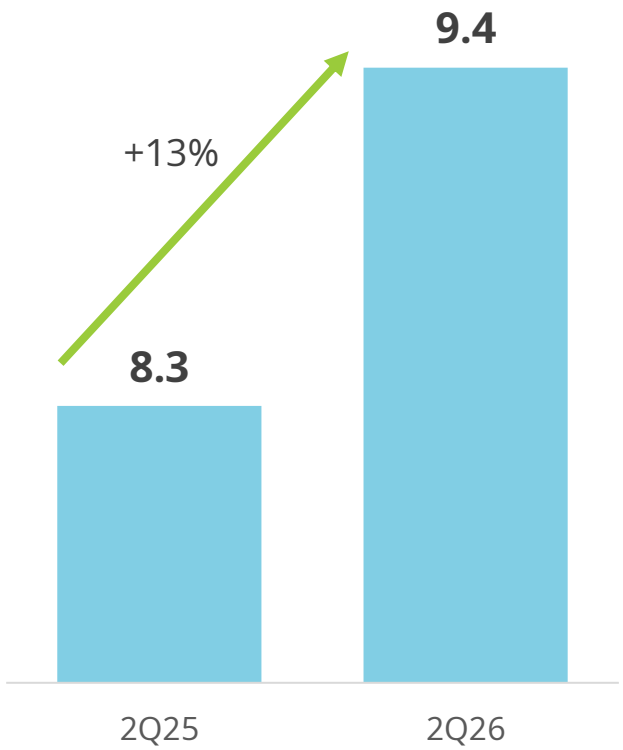
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Financial Performance

Revenues ($M)



EBITDA ($M)



$250M

TTM Revenue

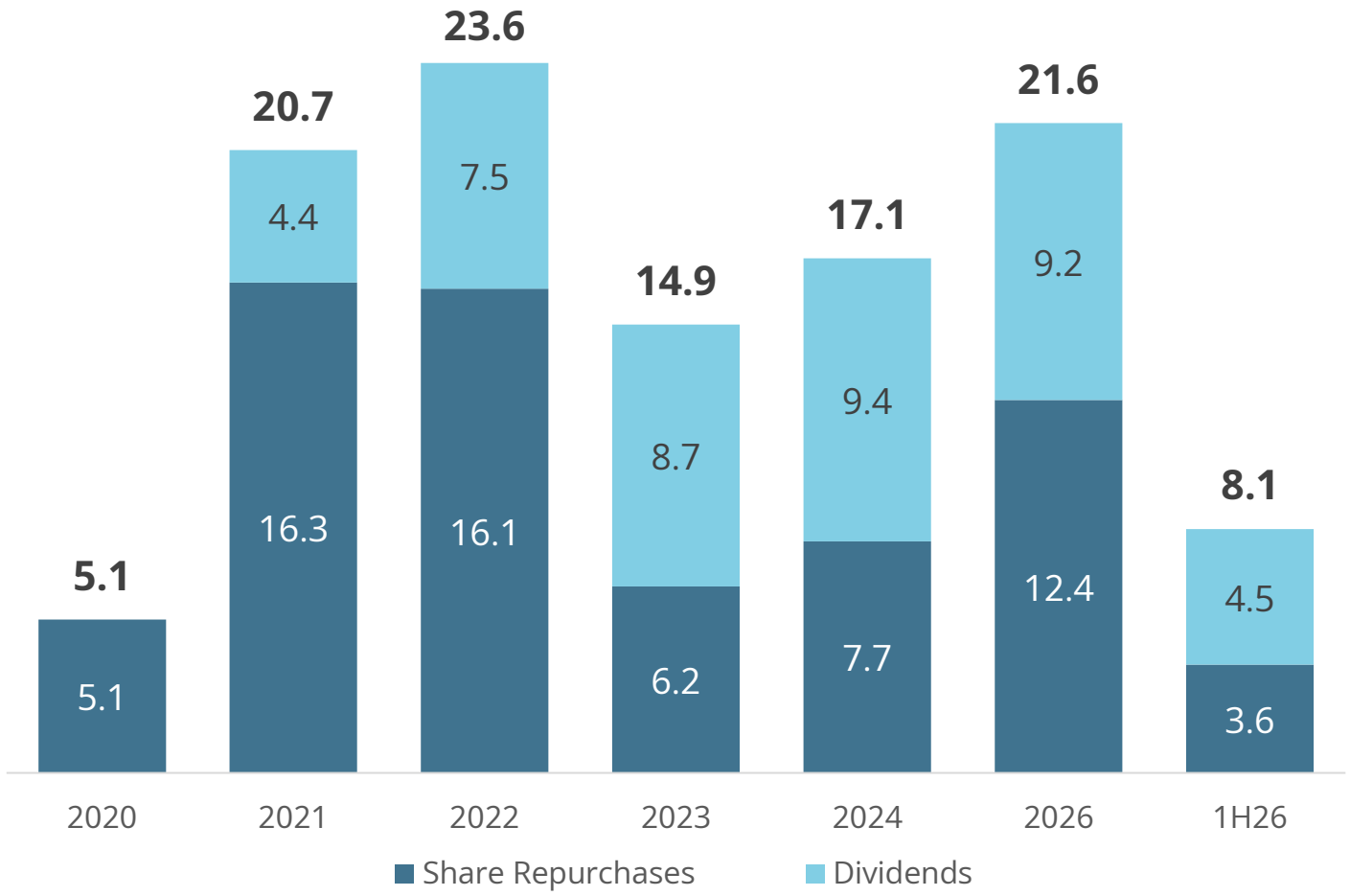
$34M

TTM EBITDA

All values are in millions of USD
Figures as of June 30, 2026

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Shareholder Returns



$111M

Returned to shareholders since 2020

All values are in millions of USD
Figures as of June 30, 2026

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Capital Structure

Prudent use of capital:

- Dividends
- Share buybacks
- Debt repayment
- Bolt-on acquisitions to drive recurring revenue and digital focus

$23.7M Cash	$59.2M Gross Debt
$35.5M Net Debt	49.8M Fully Diluted Shares Outstanding

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Figures as of June 30, 2026

Investment Thesis

WHY INVEST IN ISG

1. **Unique and leading position in managed services, software and cloud markets**
   50% market share of advised sourcing transactions
2. **Deep and wide data moat**
   The industry's deepest technology benchmark and sourcing contract databases
3. **Market opportunity and client permission**
   98% advocacy rate with our 900+ blue chip clients; ISG viewed as a trusted, independent advisor
4. **Growth plan in place to take advantage of this opportunity**
   Recurring revenue, AI, ISG Tango, digital & business transformation, enterprise change, ISG NEXT
5. **Track record of prudent use of capital**
   Dividends, share buybacks, debt repayment, bolt-on acquisitions to enhance talent & strategic focus

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Let’s connect:

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ISG (Nasdaq: III) is a global *AI-centered* technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world’s top 100 enterprises, ISG is a long-time leader in technology and business services that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data and research, in-depth knowledge and governance of provider ecosystems, and the expertise of its 1,500 professionals worldwide working together to help clients maximize the value of their technology investments.

ir.isg-one.com

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