

IT Services
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GEN AI

Millenium Shapeshifter to Transform Services

- GenAI could generate savings of 20-40% in the software development lifecycle.
- Could *Services as a Software* be the new SaaS? Prospective TAM and margin gains hint at possibilities.
- GenAI-led efficiency gains are unarguable, but lessons of the past underscore long diffusion cycles for gamechangers.
- Outlook 2025: Global techs offer better risk-reward (lower-than-historical multiples + relative underperformance vs Indian techs).

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