

ADROIT INDUSTRIES (INDIA) LIMITED



28th October, 2026

To
National Stock Exchange of India Limited
Exchange Plaza, Plot No. C/1, G Block,
Bandra Kurla Complex
Bandra (E), Mumbai – 400 051
Symbol: **ADROITIND**

To
BSE Limited
Phiroze Jeejeebhoy Towers
25th floor, Dalal Street, Fort
Mumbai – 400 001
Scrip Code: **544950**

Sub: Investor Presentation for the Quarter ended September 30, 2026.

Dear Sir/Madam,

Please find enclosed herewith investor presentation-Q2 FY27 of Adroit Industries (India) Limited. This presentation is being submitted in compliance with Regulation 30(6) of the SEBI (Listing Obligations and Disclosure Requirements), Regulations, 2015, as amended. This is for the general information of the investors and public at large.

These are also being made available on the Company's website www.adroitindustries.com.

This is for your information and records.

Yours faithfully,

For **Adroit Industries (India) Limited**

Garima Shukla
Company Secretary & Compliance Officer





PRECISION | PERFORMANCE | GLOBAL REACH

ADROIT INDUSTRIES

(INDIA) LIMITED

Q2 FY27 INVESTOR PRESENTATION



40+

YEARS OF
EXCELLENCE



3

MANUFACTURING
FACILITIES



5,000+

PRODUCT
SKUS



35+

COUNTRIES
WORLDWIDE

DRIVING PROGRESS. POWERING TOMORROW.
SINCE 1966



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COMPANY OVERVIEW



Vertically Integrated Manufacturer

Propeller shafts and torque transmission components.



Critical Power Transmission Components

For automotive and non-automotive applications, including Defence and Fire Fighting.



Precision Engineering with Global Reach

Serving OEMs and Tier-1 driveline suppliers, with exports to 35+ Countries.



SUBSIDIARIES



Adroit Driveshafts Private Limited

📍 India | Manufacturing & distribution

👥 99.87% owned



Adroit Driveshafts Canada Limited

📍 Canada | Import & distribution

👥 Wholly owned



Adroit Driveshafts USA LLC

📍 USA | Import & distribution

👥 Wholly owned

KEY MILESTONES

Building Capabilities. Expanding Reach. Driving Growth.



1966

Foundation

Established as a partnership firm.



1995

Corporate Transformation

Converted into a public limited company; acquired the Sanwer plant through takeover of M/s. Hindustan Springs.



1996

Forging Capabilities

Acquired the Dewas Forging Facility for in-house forging.



2007

Promoter Transition

Present promoters acquired ownership from the erstwhile promoters.



2016

Quality Certification

Achieved IATF 16949:2016 certification.



2022

Manufacturing & Global Expansion

Established the Pithampur facility; acquired a 99.87% stake in ADPL and incorporated Adroit Driveshafts Canada Limited.



2025–26

Portfolio & International Growth

Launched aluminium driveline components, crossed 5,000+ SKUs and incorporated a U.S. subsidiary.

MANUFACTURING PROCESS

From raw material to finished assembly.



MATERIAL PREPARATION

01

Test raw materials and cut blanks to the required dimensions.

FORGING AND HEAT TREATMENT

02

Form components and develop the required material properties.

PRECISION MACHINING

03

Machine, form splines and harden components for their application.

ASSEMBLY AND BALANCING

04

Assemble and balance finished propeller shafts where required.

FINISHING AND DISPATCH

05

Coat, inspect and pack products before dispatch.

In-house control supports quality, traceability and production planning.

Process steps vary by product.

COMPETITIVE STRENGTHS



WIDE PRODUCT RANGE

5,250 SKUs

Components and complete assemblies for automotive and industrial use.



INTEGRATED MANUFACTURING

3 facilities

In-house forging, machining, heat treatment and assembly.



STRONG REPEAT BUSINESS

87.39%

of Q2 FY27 product sales came from repeat customers.



CUSTOMER QUALIFICATION

12–18 months or longer

Industry approval cycles involve audits, testing and tooling investment.



ENGINEERING AND TESTING

Built to customer specifications

Precision machining, metallurgical testing and dynamic balancing.



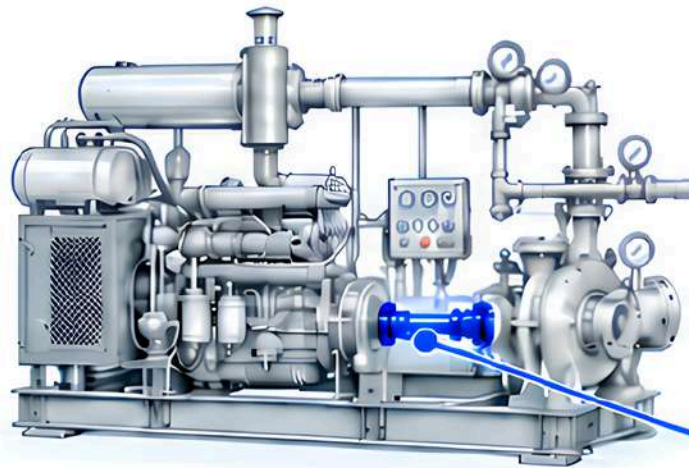
ESTABLISHED EXPORT REACH

35 Countries

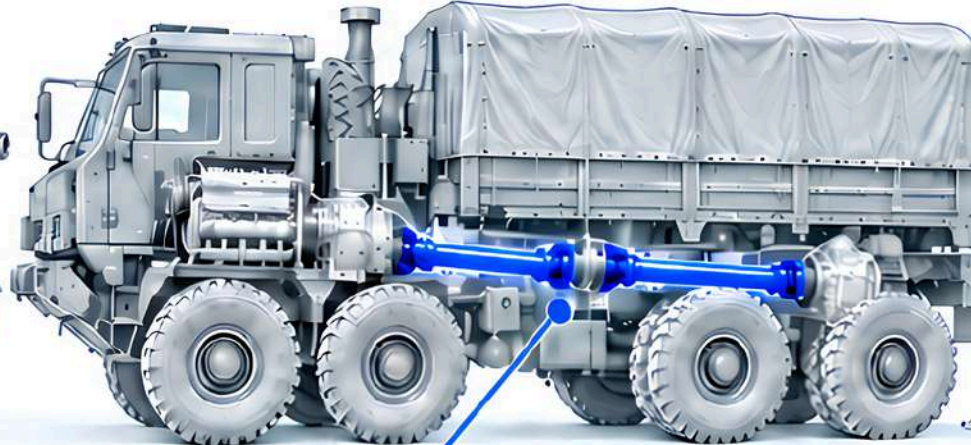
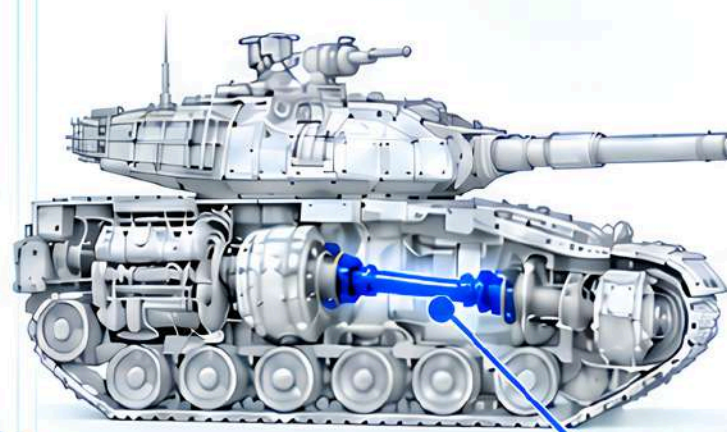
Exports contributed 82% of Q2 FY27 product sales.

PROPELLER SHAFT ASSEMBLIES

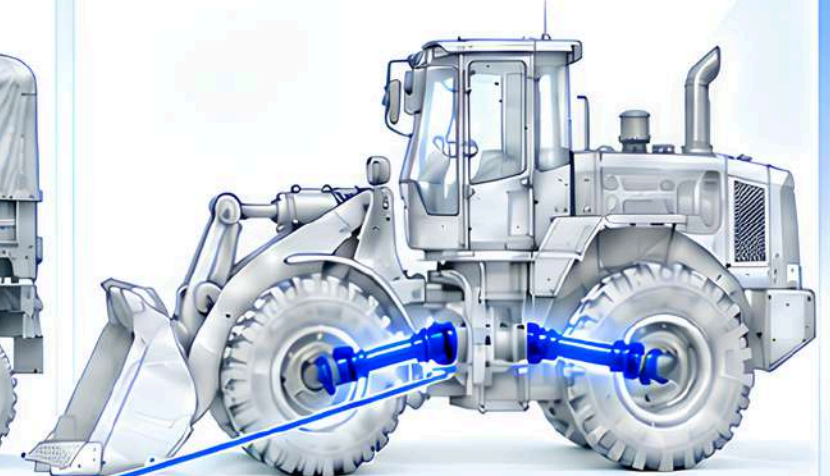
FIRE FIGHTING



DEFENCE



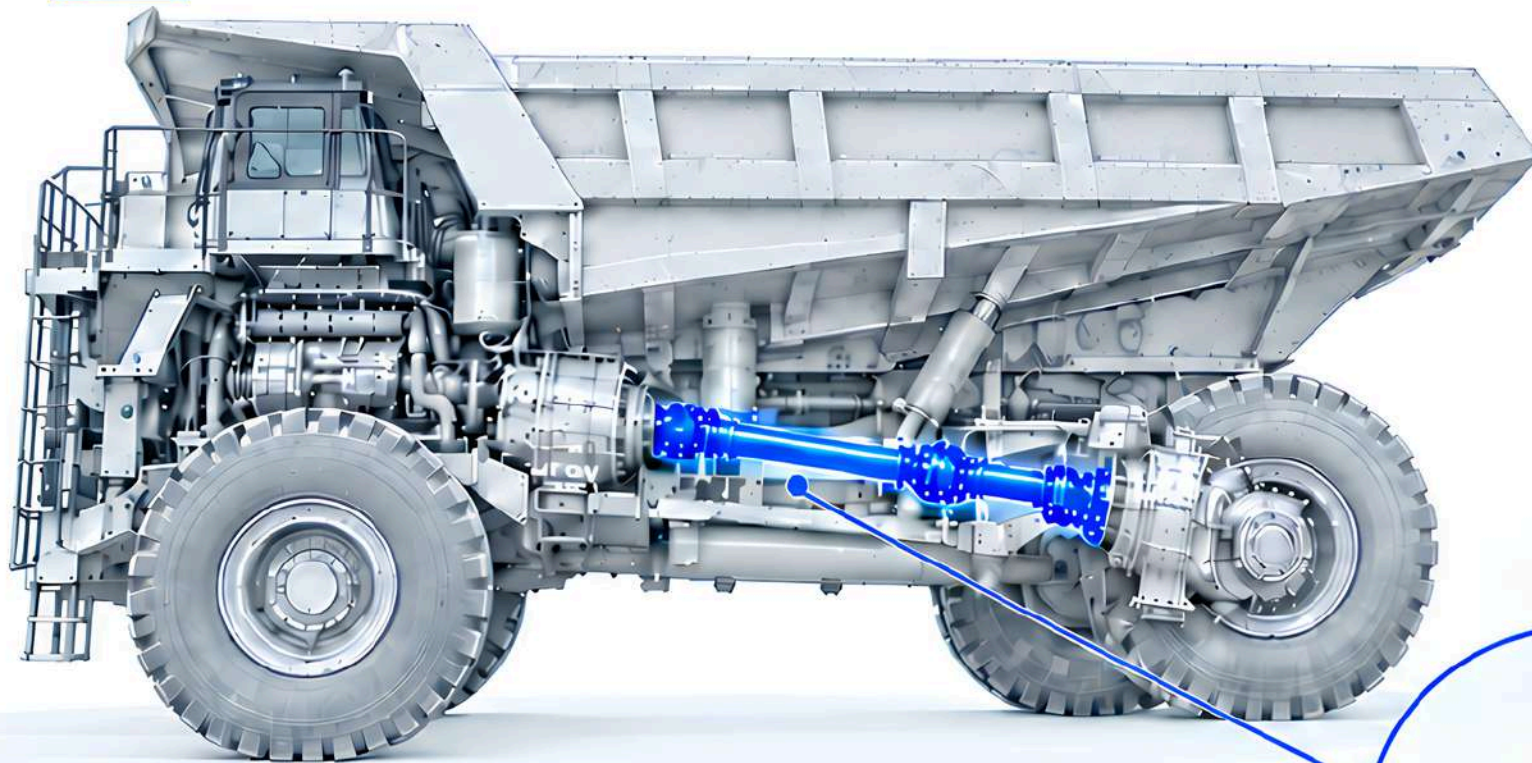
CONSTRUCTION & MINING



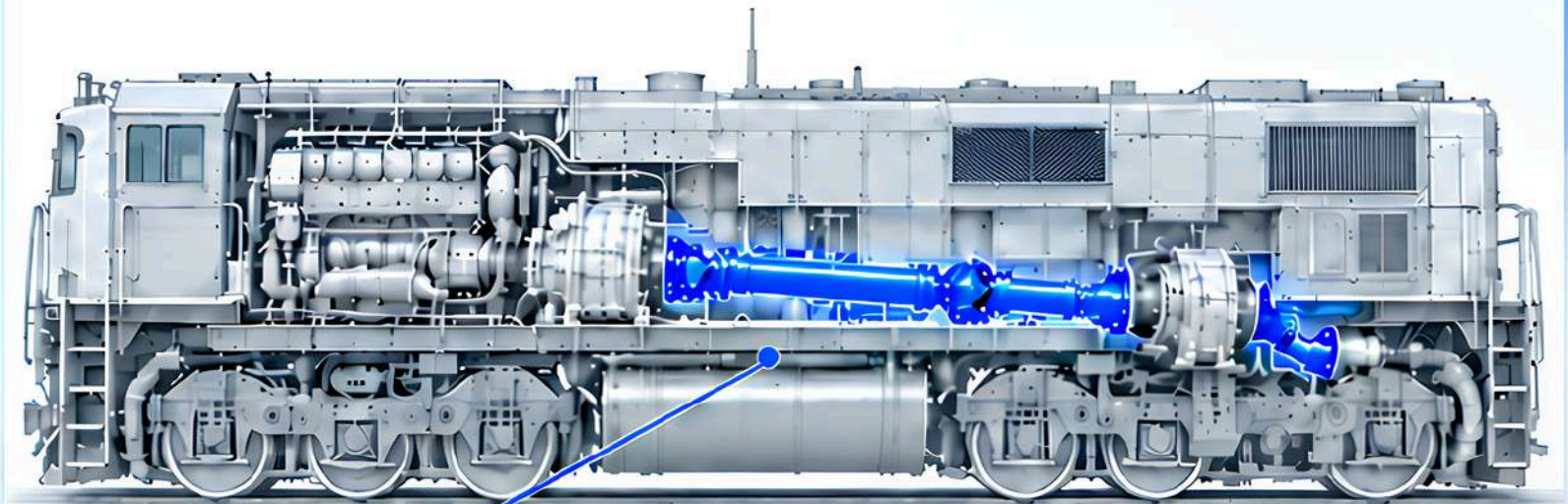
Propeller Shaft / Drive Shaft

PROPELLER SHAFT ASSEMBLIES

MINING



LOCOMOTIVE



Propeller Shaft / Drive Shaft

PRODUCT PORTFOLIO



Propeller shaft assemblies



Universal joints (U-Joints)



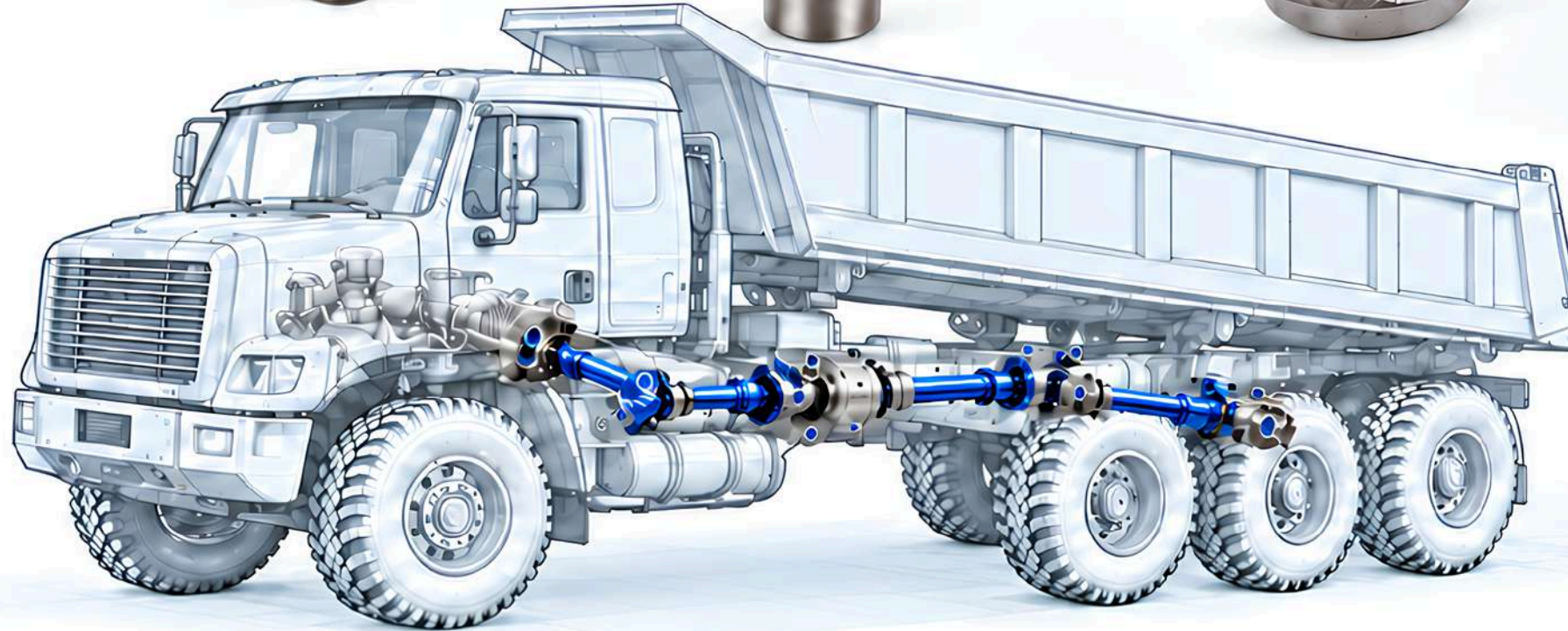
End yokes
(Bore, Keyway, Clamp, Splined)



Tube yokes / Weld yokes



Flange yokes
(SAE / DIN / Cross-serrated, etc.)



Centre support bearings



Short-coupled shafts / Tubular shafts / Mid-ship shafts



Splined stub shafts



Forged products
(Manufacturing input)



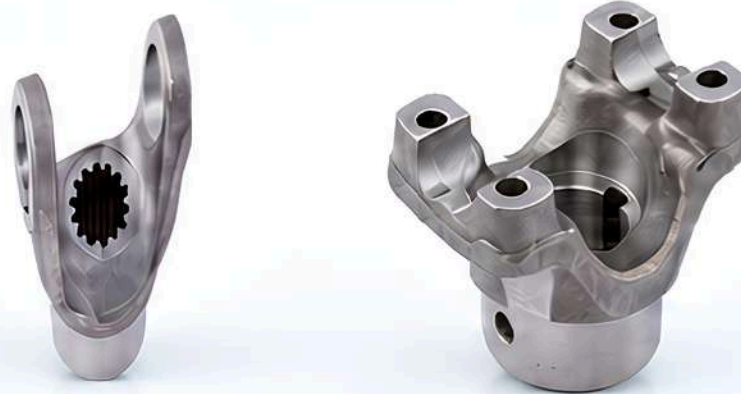
PRODUCT PORTFOLIO



**Sleeve Yokes /
Slip Yokes**



End Yokes
(Bore, Keyway, Clamp, Splined)



**Companion
Flanges**



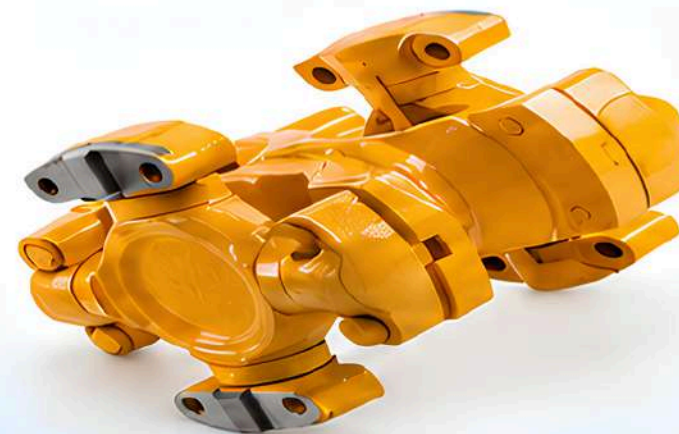
Yoke Shafts
(External splines)



**Short-Coupled Shafts /
Tubular Shafts / Mid-Ship Shafts**



**Mechanics-style Cardan
Parts and Accessories**
(incl. small parts)



**CV Double Cardan
Driveshaft Assemblies**



EXPORT REACH

Serving customers across international markets.



H1 FY27 export destination	Share of export sales
United States	59.56%
Canada	10.33%
Australia	6.23%
Colombia	4.29%
Mexico	3.62%
Other markets combined	15.97%



US

Regional presence to support customer relationships and service.



CANADA

Customer engagement, coordination and after-sales support.

MANUFACTURING FACILITIES

Three complementary facilities in Madhya Pradesh.



DEWAS (Area: 15,095.50 sq m)

FORGING

Installed capacity: **3,000** (Tons)

Effective capacity (Half Yearly): **1,200** (Tons)

Production: **1,120** (Tons)

93.33%

H1 FY27 capacity utilisation



PITHAMPUR (Area: 27,535 sq m)

MACHINING AND ASSEMBLY

Installed capacity: **900,000** (Nos.)

Effective capacity (Half Yearly): **450,000** (Nos.)

Production: **365,610** (Nos.)

81.25%

H1 FY27 capacity utilisation



SANWER (Area: 8,918.69 sq m)

FINISHING

Installed capacity: **547,000** (Nos.)

Effective capacity (Half Yearly): **42,500** (Nos.)

Production: **14,750** (Nos.)

34.71%

H1 FY27 capacity utilisation

MANUFACTURING EXPANSION ROADMAP

DEWAS

Forging capacity (MT)



PITHAMPUR

Machining and assembly capacity (units)



Plant and machinery worth **₹637 Million** is planned under the IPO proceeds, out of which machinery worth **₹500 Million** has been received and is currently operational; orders worth **₹300 Million** have already been placed.

MARQUEE CUSTOMERS

An expanding customer base with a high contribution from repeat business.



FleetPride



Inland Truck
Parts & Service



Godrej & Boyce



BEML



VE Commercial
Vehicles



Oilgear India



Ashok Leyland



Conmat Heavy
Industries



Phooltas Transrail



Hailstone
Innovations



ARX Mining and
Construction



Venus Techno
Equipment



Action Construction
Equipment



Ajax Engineering



Eimco Elecon

PROFIT & LOSS STATEMENT

Amounts in INR Mn, except EPS and percentages

Particulars	Q2 FY27	Q1 FY27	QoQ	H1 FY27	H1 FY26	YoY
Revenue	426.73	341.14	25%	767.87	692.31	11%
Raw Material Consumption	129.16	92.40		221.56	202.21	
Employee Benefits Expense	70.69	59.27		129.96	126.82	
Other Expenses	107.32	83.96		191.28	210.93	
EBITDA	119.56	105.51	13%	225.07	152.35	48%
EBITDA Margin	28.0%	30.9%	-290 bps	29.3%	22.0%	+731 bps
Other Income	11.17	12.93		24.1	22.18	
Finance Cost	13.76	11.85		25.61	23.97	
Depreciation	11.01	11.25		22.26	21.29	
Profit Before Tax	105.96	95.33	11%	201.30	129.27	56%
Tax	20.49	20.45		40.94	22.86	
Profit After Tax	85.47	74.89	14%	160.36	106.41	51%
EPS (INR)	1.91	1.67		3.58	2.37	

BALANCE SHEET

Consolidated | Amounts in INR million



ASSETS	30 Sep 2026	30 Sep 2025
NON-CURRENT ASSETS		
Property, plant and equipment	521.76	518.05
Intangible assets	2.25	0.99
Right-of-use assets	40.91	41.54
Investments	283.00	227.15
Loans	20.69	126.58
Other financial assets	14.30	12.10
Other non-current assets	-	-
Total Non-current Assets	882.91	926.41
CURRENT ASSETS		
Inventories	624.28	488.43
Trade receivables	613.03	451.09
Cash and cash equivalents	1,313.25	16.57
Other financial assets	-	0.06
Other current assets	428.40	174.36
Total Current Assets	2,978.96	1,130.51
TOTAL ASSETS	3,861.87	2,056.93

EQUITY AND LIABILITIES	30 Sep 2026	30 Sep 2025
EQUITY		
Equity share capital	448.08	174.56
Other equity	2,229.30	974.99
Equity attributable to owners	2,677.38	1,149.55
Non-controlling interest	0.07	(0.32)
Total Equity	2,677.45	1,149.23
NON-CURRENT LIABILITIES		
Borrowings	152.68	51.13
Lease liabilities	2.51	2.51
Provisions	12.17	8.81
Deferred tax liabilities (net)	26.68	22.84
Total Non-current Liabilities	194.04	85.29
CURRENT LIABILITIES		
Borrowings	653.92	589.58
Lease liabilities	0.00	0.00
Trade payables: micro and small enterprises	0.74	3.65
Trade payables: other than above	198.63	155.53
Other financial liabilities	37.15	29.38
Other current liabilities	35.48	11.46
Provisions	3.67	1.39
Current tax liabilities (net)	60.79	31.42
Total Current Liabilities	990.38	822.41
TOTAL EQUITY AND LIABILITIES	3,861.87	2,056.93

GROWTH STRATEGIES

**01****EXPAND MANUFACTURING**

Add forging equipment at Dewas and machining, assembly and testing capacity at Pithampur.

**02****BROADEN THE PRODUCT RANGE**

Develop industrial shafts, propeller shafts, universal joints, axle shafts and aluminium driveline components.

**03****GROW INTERNATIONAL SALES**

Deepen customer relationships through US and Canadian subsidiaries, distributors, sales agents and trade exhibitions.

**04****BUILD DOMESTIC OEM BUSINESS**

Expand direct supplies to Indian OEMs and win more customer programmes.

**05****EXPANSION INTO HIGH BARRIER DEFENCE AND FIRE FIGHTING PRODUCTS**

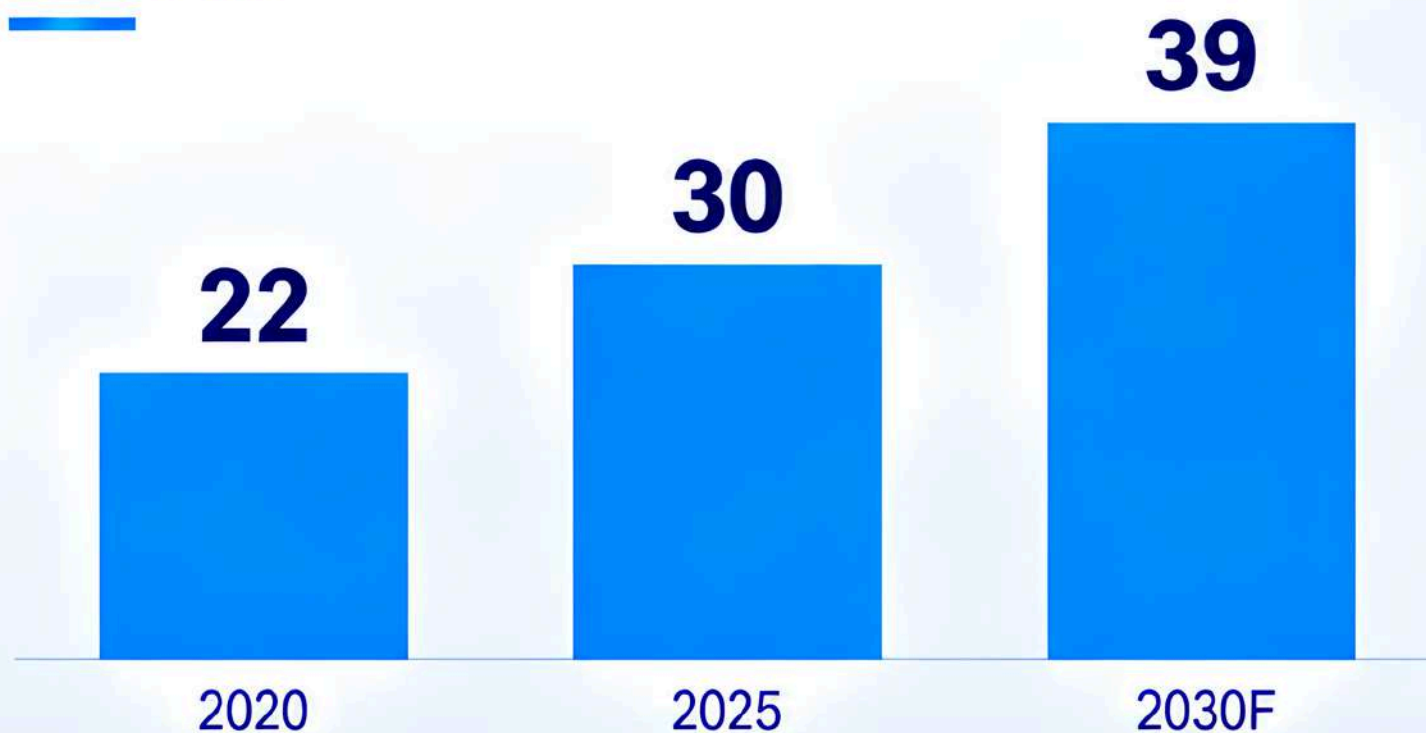
Expanding into critical Shaft Assemblies for Defence and Fire Fighting applications.



MARKET OVERVIEW

GLOBAL PROPELLER SHAFT MARKET SIZE

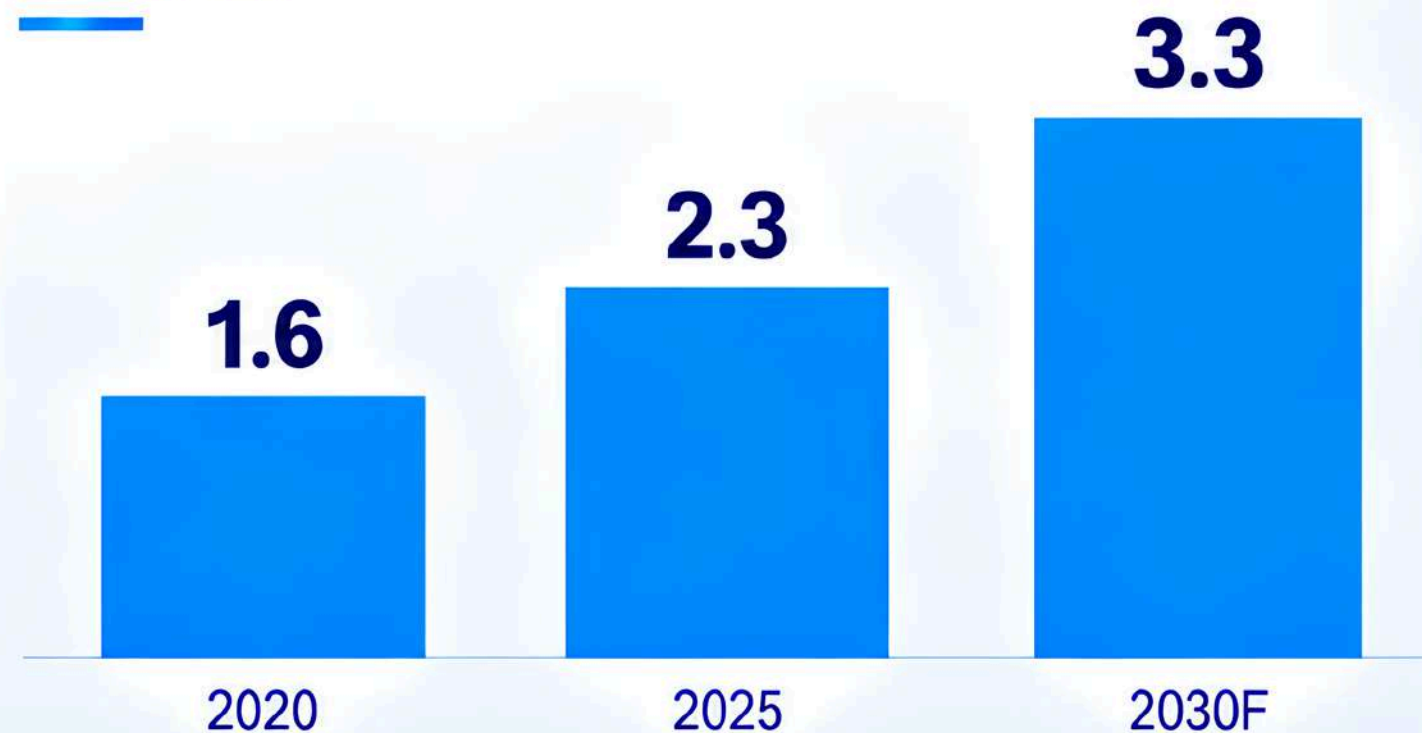
US\$ billion



5.9% CAGR | 2020–2030F

INDIAN PROPELLER SHAFT MARKET SIZE

US\$ billion



7.8% CAGR | 2020–2030F

LEADERSHIP



Saurabh Sangla

Chairman & Managing Director

- Over 18 years in plastic products manufacturing, including 8 years in torque transmission.
- Leads policy, strategy and operational performance.



Mukesh Sangla

Non-Executive Director

- Over 40 years across industries, including polymers and plastic products.
- Over 18 years in torque transmission.

MANAGEMENT COMMENTARY



Mr. Saurabh Sangla
Chairman & Managing Director
Adroit Industries (India) Limited

“Our Q2 FY27 performance reflects sequential growth in revenue and profitability. Revenue increased **25% quarter-on-quarter** to **₹426.73 million**, while EBITDA grew **13% quarter-on-quarter** to **₹119.56 million**, with a margin of **28.0%**. Profit after tax increased **14% quarter-on-quarter** to **₹85.47 million**.”

We added **13 new customers** during Q2 FY27. Our entry into the **industrial shaft and defence** segments expands our market reach and diversifies our business across end-user industries.

Our IPO-funded capacity expansion remains on track. **Machinery worth ₹50 million has already been purchased and commissioned**, and orders worth **₹300 million** have been placed. We are on schedule to operationalise the additional **machining capacity from Q4 FY27 and forging capacity by Q1 FY28**.

We are targeting full ramp-up by **Q4 FY28**, following which the expanded capacity could support **peak annual revenue of ₹2,500 million**. Our focus remains on timely execution, customer acquisition and building a strong foundation for sustained, profitable growth.”

CERTIFICATIONS



IATF 16949

Automotive quality
management



ISO 9001

Quality
management



ISO 14001

Environmental
management



ISO 45001

Occupational health
& safety

MEMBERSHIPS



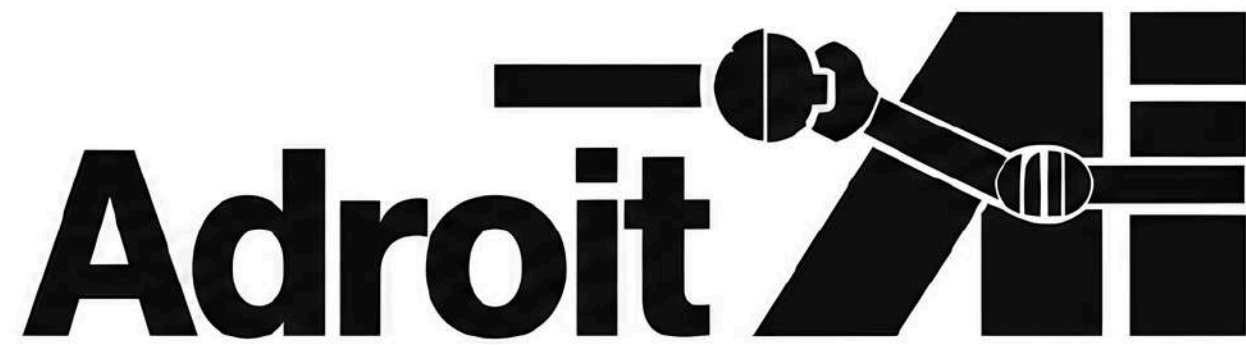
Confederation of Indian Industry



Automotive Component Manufacturers Association of India



THANK YOU



ADROIT INDUSTRIES (INDIA) LIMITED



MOONWALK
— CAPITAL —

Elevating Vision. Empowering Growth.

Moonwalk Capital IR Team



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