Basilic Fly Studio Limited
CIN : L92100TN2016PLC103861

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www.basilicflystudio.com

November 5, 2026

To,
The Manager,
National Stock Exchange of India Ltd.
Exchange Plaza, Bandra Kurla Complex,
Bandra (East), Mumbai – 400051

Symbol: BASILIC
ISIN: INE0OCC01013

Dear Sir/ Madam,

Sub.: Investor Presentation for Q2/H1 FY2026-27.

Pursuant to Regulation 30 of SEBI (Listing Obligation and Disclosure Requirements) Regulations 2015, please find enclosed Investor Presentation for the quarter and half-year ended September 30, 2026.

The aforesaid information will also be made available on the website of the Company.

Thanking you,

Yours faithfully,
For Basilic Fly Studio Limited

IKKURTHI CHANDRAMOHAN

Digitally signed by IKKURTHI CHANDRAMOHAN
Date: 2026.11.05 21:01:31 +05'30'

Ikkurthi Chandramohan
Company Secretary & Compliance Officer
M.No.: F10194



BASILIC FLY STUDIO LTD

Earnings Presentation

Q2/H1-FY27

Basilic Fly Studio At Glance

13+
Years of Experience

6 Locations
across Key Markets

770+
Team Members

500+
Clients

11,800+
Projects Delivered

1,260+
Movies Delivered

2,400+
Series Delivered

8,160+
Commercials Delivered

73%
3 Year Revenue CAGR*

22%
3 Year PAT CAGR*

18%
ROE*

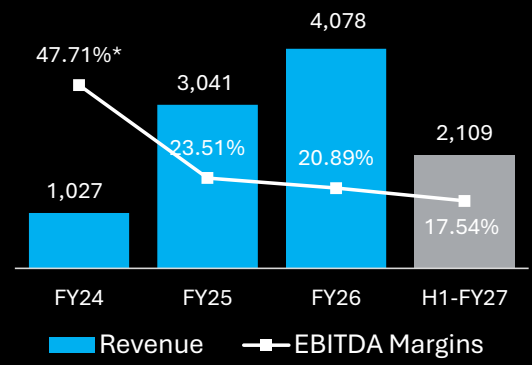
24%
ROCE

* Figures as on H1 'FY27

Company Overview

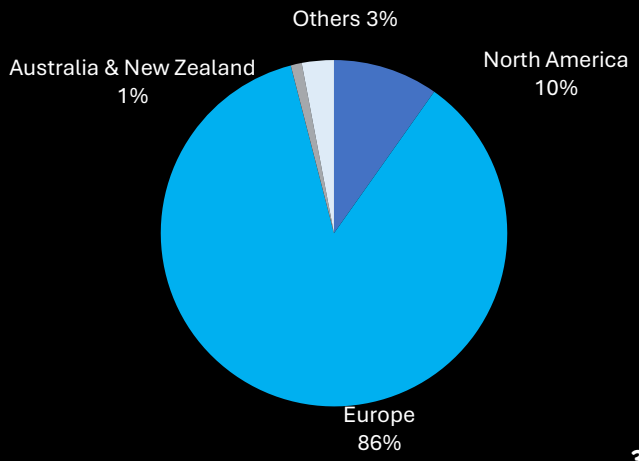
- Basilic Fly Studio Limited is a globally integrated visual effects company delivering premium VFX services across feature films, episodic content, streaming platforms and emerging visual media, supported by operations in India, the United Kingdom, France and Canada.
- The August 2024 acquisition of a majority stake in BAFTA and Emmy-winning One of Us has significantly strengthened the Group's creative leadership, premium client portfolio and direct access to the UK and European markets.
- The Group combines award-winning creative supervision and client-facing leadership in the UK and Europe with scalable, cost-efficient production capabilities in India, creating a differentiated global delivery model.
- With nearly 800 artists and production professionals, Basilic Fly offers end-to-end VFX capabilities across the production pipeline, enabling clients to engage with a single integrated partner for complex visual effects work.
- The Company continues to invest in pipeline automation, AI-assisted production workflows and operational excellence to improve productivity, scalability and delivery consistency while maintaining the highest standards of quality and security.
- The ongoing rationalisation of the global VFX industry presents a significant opportunity for well-capitalised, independent studios with strong execution capabilities, positioning Basilic Fly to gain market share and deepen strategic client relationships.

Consolidated Operational Revenue (INR Mn) & EBITDA Margins (%)



*EBITDA margins through July 2024 reflect standalone India operations only, preceding the consolidation of One of Us (UK) in August 2024.

H1-FY27 Geographical Revenue Split (%)

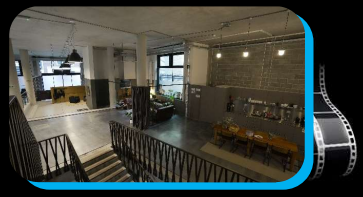


Building a Global VFX Network

BFS
London, UK



BFS - One Of Us
London, UK



BFS
Vancouver, Canada





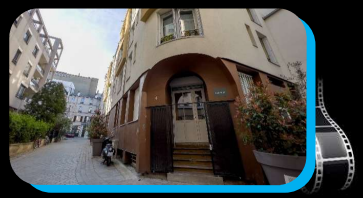
BFS
Pune, India



BFS Headquarters
Chennai, India



BFS - One of Us
Paris, France



Business Overview

What we do

- Deliver end-to-end visual effects solutions across the entire production pipeline, from creative planning through final delivery.
- Supporting feature films, episodic television, streaming platforms, commercials and emerging digital content.

Who we work With

- Leading global studios and production companies creating feature films and premium episodic content.
- Global streaming platforms supporting high-volume original content production.
- Visual effects studios through strategic production partnerships and collaborative delivery models.

How we generate revenue

- Revenue generated through project-based contracts across feature films, episodic content and streaming productions.
- Commercial engagements structured through fixed-price, time-and-material and multi-project delivery arrangements.

How work is executed

- Creative leadership, client engagement and project supervision delivered through teams in the UK, Europe and North America.
- Scalable production, technical execution and delivery enabled by Basilic Fly's integrated operations in India.

Award-Winning Creative Leadership. Capital-Efficient Execution. Global Growth Platform.



Trusted by the World's Leading Studios & Streamers



Key Strengths



1	**Diversified Client Engagement Model**	Operates across both direct client relationships and sub-contracting engagements. Reduces reliance on any single revenue model.
2	**Hybrid Global Delivery Model**	Creates a cost + delivery moat difficult for pure domestic or pure overseas studios to replicate. It combines overseas client proximity with India-led cost-efficient execution.
3	**Reputation for Quality, Security & Global Trust**	Trusted Partner Network certification highlights the company's strong adherence to global content security and delivery standards, while industry recognitions and client testimonials reinforce its reputation for high-quality execution and reliability.
4	**Proven Scale & Execution Capability & Client Trust**	Demonstrated ability to deliver at scale with a track record spanning thousands of projects across commercials, TV series and films. Consistent repeat business highlights execution reliability, delivery discipline and long-term client confidence
5	**Strengthened Global Leadership Bench**	Strengthened global leadership with senior creative and BD hires including Adrian De Wet and Audrey Ferrara (VFX), alongside Marianne Speight (LA) and Theresa Patten-Koeckert (London), along with Creative supervison of Abishek Nair (UK) supported by a reinforced operations leadership team, enabling scalable execution and sustained growth.

Growth Roadmap

1

Targeted Geographic Expansion:

- Expands access to regional talent pools and new client ecosystems
- Enhances BFS's ability to serve global productions locally

2

Scalable, Future-Ready Platform:

- Operations designed to scale without compromising quality or delivery timelines
- Clear roadmap toward becoming a globally integrated VFX powerhouse

3

Established International Presence:

- Active studios in Vancouver and London supporting client-facing and creative execution
- Accelerating its global diversification with a strategic focus on Europe and North America

4

Global Delivery Foundation:

- Operates as a centralized global delivery hub for international clients
- Single, integrated technology workflow across all locations

5

Operational Leverage:

- Strong operational base in Chennai and Pune
- Established a new Bengaluru creative division to support the UK subsidiary (One of Us), with hiring ramp-up underway and billing commenced from October FY25, enabling scalable delivery and improved cost efficiency.




Financial
Overview

Q2/H1-FY27 Financial Highlights

Q2-FY27 Standalone Highlights

INR 298 Mn Revenue from Operations **(13.1)% YoY**	**INR 160 Mn** Operational EBITDA **(14.4)% YoY**	**53.69%** Operational EBITDA Margin
INR 58 Mn PAT **(52.5)% YoY**	**18.95%** PAT Margin	**INR 2.28** Diluted EPS

Q2-FY27 Consolidated Highlights

INR 1,074 Mn Revenue from Operations **12.8% YoY**	**INR 225 Mn** Operational EBITDA **(11.1)% YoY**	**20.95%** Operational EBITDA Margin
INR 73 Mn PAT **(49.7)% YoY**	**6.88%** PAT Margin	**INR 2.91** Diluted EPS

H1-FY27 Standalone Highlights

INR 558 Mn Revenue from Operations **2.4% YoY**	**INR 270 Mn** Operational EBITDA **(0.0)% YoY**	**48.39%** Operational EBITDA Margin
INR 113 Mn PAT **(33.5)% YoY**	**19.52%** PAT Margin	**INR 4.48** Diluted EPS

H1-FY27 Consolidated Highlights

INR 2,109 Mn Revenue from Operations **11.4% YoY**	**INR 370 Mn** Operational EBITDA **(15.7)% YoY**	**17.54%** Operational EBITDA Margin
INR 139 Mn PAT **(47.5)% YoY**	**6.55%** PAT Margin	**INR 5.52** Diluted EPS

Q2/H1-FY27 Operational Highlights

Marquee Project Deliveries:

- Domestic: Delivered Jailer 2, a highly anticipated theatrical production starring Superstar Rajinikanth.
- International: Delivered five marquee titles for leading global studios and streaming platforms, ***Ahsoka (Season 2)***: Lucasfilm, Disney+, ***Practical Magic 2***: Warner Bros. Pictures, ***Elsinore:*** StudioCanal, Apple TV+.
- Global Client Reach: Deliveries across Netflix, Disney+, Warner Bros., StudioCanal and Apple TV+ reinforce Basilic Fly Studio's position as a trusted partner for premium international content.
- Balanced Portfolio: Gradual expansion of domestic tentpole productions and leading position for international series to drive margins.

Technology:

- Agentic AI Adoption: Implement production & VFX AI tools with a commercially safe gen-AI sandbox. Comprehensive automation as standalone tool for Production Scheduling & reporting being built. Tool helps to automate documentation, system monitoring, render farm management and routine IT tasks, improving operational efficiency and allowing teams to focus on higher-value activities.
- Storage – Cloud Cache: BFS now caches London-based storage locally at each site, enabling artists to access shared data at local network speeds without duplicating storage infrastructure.
- Project Hybrid: Infrastructure combining an on-site build in Chennai with cloud-burst capacity has been completed, reducing cloud costs by 50% while retaining flexibility to scale during peak demand.
- Universal Scene Description (USD): BFS has begun a phased rollout of USD on a live production, enabling the adoption of industry-standard pipeline technology without compromising project delivery.
- NetApp Storage: The new NetApp storage system is now live and performing to expectations, improving network and overall studio performance.

Leadership & Workforce:

- Executive Producer – OOU London: Katy Mummery has joined One Of Us, London, as Executive Producer, bringing over 15 years of experience across leading global VFX studios. Her expertise will strengthen production management, client relationships and delivery capabilities.
- Boot Camps: BFS has completed its talent boot camp programme, with 90% of trainees inducted into live production, strengthening the talent pipeline and supporting future workforce requirements.
- Internal Upskilling & Training: BFS's IO teams have been trained in editing and pipeline technicals to improve production workflow efficiency and support the planned global data support centre in Chennai.

Media coverage & Industry participation:

- Business Standard Feature: BFS was featured in Business Standard's print media Sep 2026 coverage of India's SME growth story, reflecting BFS expanding global VFX presence across the UK, Canada and Europe.
- Tech Summits & AI Panels: Global COO Zameer Hussain represented BFS at the TECH STAR Summit, sharing insights on AI-driven asset creation and scalable 3D video pipelines to enhance production efficiency and scalability.
- Reliance Animation Academy: Head of Studio Amir Shahinsha participated in the launch of Reliance Animation Academy's new Tamil Nadu centre in Velachery, Chennai, reinforcing BFS's commitment to talent development and mentoring aspiring VFX professionals.
- Broadcast Media Cinema Expo: VFX Supervisor Selvakumar joined an expert panel to discuss on-set supervision, real-time workflows and the role of generative AI in post-production, showcasing BFS's expertise in evolving filmmaking technologies.

Forward Looking Priorities

- Bengaluru Studio Expansion: New studio scheduled operational from Jan 2027, targeting 40% of total work as headcount doubles.

Quarterly Standalone Profit & Loss Statement

Particulars (INR Mn)	Q2-FY27	Q2-FY26	Y-o-Y	Q1-FY27	Q-o-Q
Revenue from Operations	**298**	**343**	**(13.1)%**	**260**	**14.6%**
Operating Expenses	138	156	(11.5)%	150	(8.0)%)
Operating EBITDA	**160**	**187**	**(14.4)%**	**110**	**45.5%**
Operating EBITDA Margins (%)	***53.69%***	***54.52%***	***(83) Bps***	***42.31%***	***1,138 Bps***
Depreciation	70	15	366.7%	36	94.4%
Finance Cost	18	13	38.5%	19	(5.3)%
Other Income	8	6	33.3%	12	(33.3)%
Exceptional Items	0	0	NA	0	NA
PBT	**80**	**165**	**(51.5)%**	**67**	**19.4%**
Tax	22	43	(48.8)%	12	83.3%
Profit after Tax	**58**	**122**	**(52.5)%**	**55**	**5.5%**
PAT Margins (%)	***18.95%***	***34.96%***	***(1,601) Bps****	***20.22%***	***(127) Bps***
Diluted EPS (INR)	2.28	4.82	(52.7)%	2.20	3.6%

*YoY PAT margin % decline is primarily on account of depreciation impact of Q2'27 capitalization.
Note: PAT margin is calculated as Profit After Tax divided by total income, comprising revenue from operations and other income.

Half Yearly Standalone Profit & Loss Statement

Particulars (INR Mn)	H1-FY27	H1-FY26	Y-o-Y
Revenue from Operations	**558**	**545**	**2.4%**
Operating Expenses	288	275	4.7%
Operating EBITDA	**270**	**270**	**0.0%**
Operating EBITDA Margins (%)	***48.39%***	***49.54%***	***(115) Bps***
Depreciation	106	28	278.6%
Finance Cost	37	22	68.2%
Other Income	21	11	90.9%
Exceptional Items	0	1	NA
PBT	**148**	**230**	**(35.7)%**
Tax	35	60	(41.7)%
Profit after Tax	**113**	**170**	**(33.5)%**
PAT Margins (%)	***19.52%***	***30.58%***	***(1,106) Bps****
Diluted EPS (INR)	4.48	6.75	(33.6)%

*YoY PAT margin % decline is primarily on account of depreciation impact of Q2'27 capitalization.
Note: PAT margin is calculated as Profit After Tax divided by total income, comprising revenue from operations and other income.

Quarterly Consolidated Profit & Loss Statement

Particulars (INR Mn)	Q2-FY27	Q2-FY26	Y-o-Y	Q1-FY27	Q-o-Q
Revenue from Operations	**1,074**	**952**	**12.8%**	**1,035**	**3.8%**
Operating Expenses	849	699	21.5%	891	(4.7)%
Operating EBITDA	**225**	**253**	**(11.1)%**	**144**	**56.3%**
Operating EBITDA Margins (%)	***20.95%***	***26.58%***	**(563) Bps***	***13.91%***	**704 Bps**
Depreciation	85	35	142.9%	53	60.4%
Finance Cost	21	19	10.5%	28	(25.0)%
Other Income	(13)	10	(230.0)%	28	(146.4)%
Exceptional Items	10	27	(63.0)%	30	(66.7)%
PBT	**96**	**182**	**(47.3)%**	**61**	**57.4%**
Tax	23	37	(37.8)%	(5)	560.0%
Profit after Tax	**73**	**145**	**(49.7)%**	**66**	**10.6%**
PAT Margins (%)	***6.88%***	***15.07%***	**(819) Bps****	***6.21%***	**67 Bps**
Diluted EPS (INR)	2.91	5.72	(49.1)%	2.61	11.5%

* YoY EBITDA % is impacted due to change of revenue mix. Q2'27 growth is driven by overseas business i.e. comparatively lower margin segment.
**YoY PAT margin % decline is primarily on account of depreciation impact of Q2'27 capitalization.
Note: PAT margin is calculated as Profit After Tax divided by total income, comprising revenue from operations and other income.

Half Yearly Consolidated Profit & Loss Statement

Particulars (INR Mn)	H1-FY27	H1-FY26	Y-o-Y
Revenue from Operations	**2,109**	**1,894**	**11.4%**
Operating Expenses	1,739	1,455	19.5%
Operating EBITDA	**370**	**439**	**(15.7)%**
Operating EBITDA Margins (%)	***17.54%***	***23.18%***	***(564) Bps***
Depreciation	138	68	102.9%
Finance Cost	50	40	25.0%
Other Income	14	16	(12.5)%
Exceptional Items	39	28	39.3%
PBT	**157**	**319**	**(50.8)%**
Tax	18	54	(66.7)%
Profit after Tax	**139**	**265**	**(47.5)%**
PAT Margins (%)	***6.55%***	***13.87%***	**(732) Bps ***
Diluted EPS (INR)	5.52	10.89	(49.3)%

*YoY PAT margin % decline is primarily on account of depreciation impact of Q2'27 capitalization.
Note: PAT margin is calculated as Profit After Tax divided by total income, comprising revenue from operations and other income.

Standalone Profit & Loss Statement

Particulars (INR Mn)	FY24	FY25	FY26	H1-FY27
Revenue from Operations	**1,003**	**735**	**1,204**	**558**
Operating Expenses	516	422	685	288
Operating EBITDA	**487**	**313**	**519**	**270**
Operating EBITDA Margins (%)	***48.55%***	***42.59%***	***43.11%***	***48.39%***
Depreciation	10	55	82	106
Finance Cost	5	35	63	37
Other Income	29	19	100	21
Exceptional Items	-	3	-	-
PBT	**501**	**239**	**474**	**148**
Tax	140	68	158	35
Profit after Tax	**361**	**171**	**316**	**113**
PAT Margins (%)	***34.98%***	***22.68%***	***24.23%***	***19.52%***
Diluted EPS (INR)	15.51	7.51	12.96	4.48

Standalone Balance Sheet

Particulars (INR Mn)	FY25	FY26	H1-FY27
ASSETS			
Non-Current Assets			
Property, Plant & Equipment	11	98	6
Intangible Assets under development	0	174	0
Intangible Assets	0	0	218
Right of use assets	104	239	199
Deferred Tax Assets (Net)	15	9	17
Financial assets - Investments	468	473	473
Other financial assets	16	336	343
Total Non- Current Assets	**614**	**1,329**	**1,256**
Current Assets			
Trade Receivables	861	996	1,302
Other Bank Balances	174	568	448
Short term loans and advances	0	0	0
Current Tax Asset (Net)	0	0	0
Other Current Assets	408	993	838
Total Current Assets	**1,443**	**2,557**	**2,588**
TOTAL ASSETS	**2,057**	**3,886**	**3,844**

Particulars (INR Mn)	FY25	FY26	H1-FY27
EQUITY AND LIABILITIES			
Equity			
Share Capital	232	253	253
Reserves and Surplus	1,147	2,268	2,381
Minority Interest	0	0	0
Shareholder's Funds	**1,379**	**2,521**	**2,634**
Long term borrowings	175	145	183
Long-term Lease liabilities	74	184	150
Long Term Provisions	33	21	23
Deferred tax liabilities (net)	0	0	0
Total Non Current Liabilities	**282**	**350**	**356**
Short term Borrowings	153	382	404
Short-term Lease liabilities	51	71	76
Trade Payables	84	332	171
Other financial liabilities	28	53	66
Short Term Provisions	73	168	131
Other Current Liabilities	7	9	6
Total Current Liabilities	**396**	**1,015**	**854**
Total Equity and Liabilities	**2,057**	**3,886**	**3,844**

Standalone Cash Flow Statement

Particulars (INR Mn)	FY25	FY26	H1-FY27
CASH FLOWS FROM OPERATING ACTIVITIES:			
Net Profit Before Tax	**239**	**474**	**148**
Adjustments for:			
Depreciation and amortisation expense	55	82	106
Provision for expected credit loss	4	5	1
Interest Expense on lease liabilities	13	9	12
Foreign Exchange (Gain)/Loss	(13)	(61)	13
Unwinding of interest on Security deposit	(1)	(1)	(1)
Profit on Sale of Fixed Assets	0	0	0
Interest Income	(5)	(29)	(11)
Interest Expenses	21	54	25
Operating Profit before working capital changes	**313**	**533**	**293**
Adjustments for changes in working capital:			
(Increase)/ decrease in trade receivables	(223)	(79)	(319)
(Increase)/ decrease in Other financial assets	27	1	0
(Increase)/ decrease in Other Current assets			
(Increase)/ decrease in Other Non-current assets	(117)	(585)	154
Increase/(decrease) in Long term Provisions	2	(12)	1
Increase/(decrease) in Short term Provisions	9	19	0
Increase/(decrease) in trade payables	(32)	248	(161)
Increase/(decrease) in Other Financial liabilities	1	25	13
Increase/(decrease) in Other current liabilities	0	3	(3)
Cash generated from operations	**(20)**	**153**	**(22)**
Income Taxes paid	(39)	(62)	(79)
Cash flow before extraordinary item	**(59)**	**91**	**(101)**
Extraordinary items	-	-	-
NET CASH FROM OPERATING ACTIVITES (A)	**(59)**	**91**	**(101)***

Particulars (INR Mn)	FY25	FY26	H1-FY27
CASH FLOWS FROM INVESTING ACTIVITIES			
Interest Received	5	29	11
(Increase)/Decrease in Bank Deposits	268	(239)	64
Fixed assets purchased including Intangible Assets	0	(296)	(16)
Loan given to related party	0	(246)	5
Investments	(405)	(5)	0
NET CASH USED IN INVESTING ACTIVITIES (B)	**(132)**	**(757)**	**64**
CASH FLOWS FORM FINANCING ACTIVITES			
Interest paid	(21)	(54)	(25)
Increase/(Decrease) in Long-Term Borrowings	170	(30)	38
Net Proceeds from issue of equity shares	0	811	0
Increase/(Decrease) in Short-Term Borrowings	135	228	22
Principle repayment of lease liabilities	(43)	(50)	(31)
Interest paid on lease liabilities	(13)	(9)	(12)
NET CASH USED IN FINANCING ACTIVITIES (C)	**228**	**896**	**(8)**
NET INCREASE IN CASH AND CASH EQUIVALENT (A+B+C)	**37**	**230**	**(45)**
Opening Cash and Cash Equivalents	7	44	274
CLOSING CASH AND CASH EQUIVALENT	**44**	**274**	**229**

Consolidated Profit & Loss Statement

Particulars (INR Mn)	FY24	FY25	FY26	H1-FY27
Revenue from Operations	**1,027**	**3,041**	**4,078**	**2,109**
Operating Expenses	537	2,326	3,226	1,739
Operating EBITDA	**490**	**715**	**852**	**370**
Operating EBITDA Margins (%)	***47.71%***	***23.51%***	***20.89%***	***17.54%***
Depreciation	10	122	163	138
Finance Cost	5	63	101	50
Other Income	31	21	106	14
Exceptional Items	0	40	32	39
PBT	**506**	**511**	**662**	**157**
Tax	140	64	156	18
Profit after Tax	**366**	**447**	**506**	**139**
PAT Margins (%)	***34.59%***	***14.60%***	***12.09%***	***6.55%***
Diluted EPS (INR)	15.68	19.20	20.78	5.52

Note: PAT margin is calculated as Profit After Tax divided by total income, comprising revenue from operations and other income.

Consolidated Balance Sheet

Particulars (INR Mn)	FY25	FY26	H1-FY27
ASSETS			
Non-Current Assets			
Property, Plant & Equipment	179	218	129
Intangible Assets under development	0	597	298
Intangible Assets	0	0	365
Good will	775	775	775
Right of use assets	277	388	338
Deferred Tax Assets (Net)	17	22	44
Financial assets - Investments	0	0	0
Other financial assets	49	129	130
Total Non- Current Assets	**1,297**	**2,129**	**2,079**
Current Assets			
Trade Receivables	772	1,382	1,456
Other Bank Balances	428	739	653
Short term loans and advances	0	0	0
Current Tax Asset (Net)	0	0	0
Other Current Assets	869	1,119	1,303
Total Current Assets	**2,069**	**3,240**	**3,412**
TOTAL ASSETS	**3,366**	**5,369**	**5,491**

Particulars (INR Mn)	FY25	FY26	H1-FY27
EQUITY AND LIABILITIES			
Equity			
Equity share capital	232	253	253
Reserves and Surplus	1,772	3,086	3,213
Minority Interest	84	102	121
Shareholder's Funds	**2,088**	**3,441**	**3,587**
Long term borrowings	357	263	258
Long-term Lease liabilities	238	329	304
Long Term Provisions	44	34	26
Deferred tax liabilities (net)	27	0	0
Total Non Current Liabilities	**666**	**626**	**588**
Short term Borrowings	155	384	408
Short-term Lease liabilities	67	89	76
Trade Payables	38	236	60
Other financial liabilities	44	59	104
Short Term Provisions	74	206	159
Other Current Liabilities	234	328	509
Total Current Liabilities	**612**	**1,302**	**1,316**
Total Equity and Liabilities	**3,366**	**5,369**	**5,491**

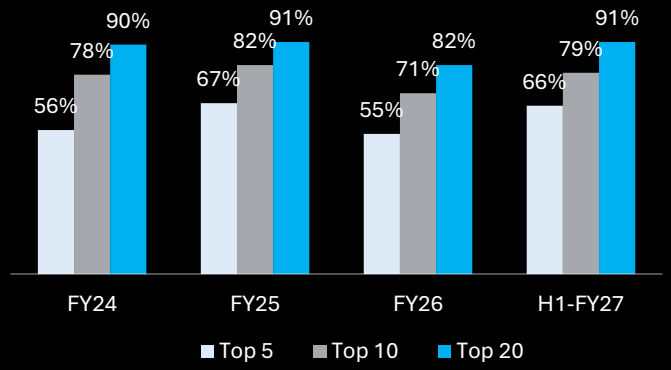
Consolidated Cash Flow Statement

Particulars (INR Mn)	FY25	FY26	H1-FY27
CASH FLOWS FROM OPERATING ACTIVITIES:			
Net Profit Before Tax	**511**	**662**	**157**
Adjustments for:			
Depreciation and amortisation expense	122	163	138
Provision for expected credit loss	4	8	10
Interest Expense on lease liabilities	22	16	17
Foreign Exchange (Gain)/Loss	13	73	13
Unwinding of interest on Security deposit	(1)	(1)	(1)
Interest Income	(7)	(31)	(13)
Interest Expenses	41	85	32
Operating Profit before working capital changes	**705**	**975**	**353**
Adjustments for changes in working capital:			
(Increase)/ decrease in trade receivables	(258)	(674)	(96)
(Increase)/ decrease in Other financial assets	(7)	(78)	0
(Increase)/ decrease in Other Non-current assets	(468)	(249)	(184)
Increase/(decrease) in Long term Provisions	14	(10)	(8)
Increase/(decrease) in Short term Provisions	9	19	0
(Increase)/ decrease in Other current assets			
Increase/(decrease) in trade payables	(23)	198	(175)
Increase/(decrease) in Other Financial liabilities	13	15	45
Increase/(decrease) in Other current liabilities	227	95	180
Increase/(decrease) in Other Non-current liabilities	27	(21)	(12)
Cash generated from operations	**239**	**270**	**103**
Income Taxes paid	(39)	(41)	(75)
Cash flow before extraordinary item	200	**229**	**28**
Extraordinary items	-	-	-
NET CASH FROM OPERATING ACTIVITES (A)	**200**	**229**	**28**

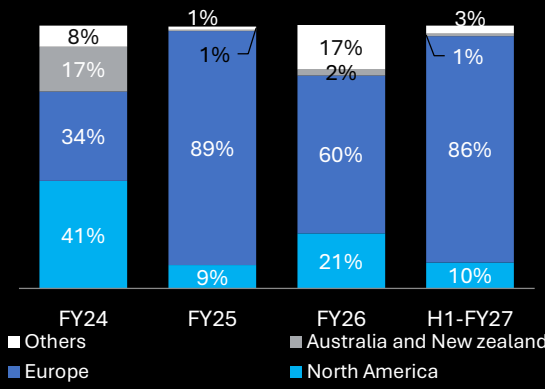
Particulars (INR Mn)	FY25	FY26	H1-FY27
CASH FLOWS FROM INVESTING ACTIVITIES			
Interest Received	7	31	13
(Increase)/Decrease in Bank Deposits	268	(164)	75
Purchase of Goodwill	(775)	0	0
Fixed assets purchased including Intangible Assets	(222)	(730)	(61)
Increase/(Decrease) in Other Non-Current Investments	0	0	0
NET CASH USED IN INVESTING ACTIVITIES (B)	**(722)**	**(863)**	**27**
CASH FLOWS FORM FINANCING ACTIVITES			
Interest paid	(41)	(85)	(32)
Increase/(Decrease) in Long-Term Borrowings	351	(94)	(5)
Net Proceeds from issue of equity shares	415	817	0
Increase/(Decrease) in Short-Term Borrowings	137	229	23
Principle repayment of lease liabilities	(48)	(69)	(40)
Interest paid on lease liabilities	(22)	(16)	(17)
NET CASH USED IN FINANCING ACTIVITIES (C)	**792**	**782**	**(71)**
Exchange difference on Realized (Loss)/Gain	(2)	(1)	5
NET INCREASE IN CASH AND CASH EQUIVALENT (A+B+C)	**270**	**148**	**(16)**
Opening Cash and Cash Equivalents	30	298	445
CLOSING CASH AND CASH EQUIVALENT	**298**	**445**	**434**

Key Performance Metrics

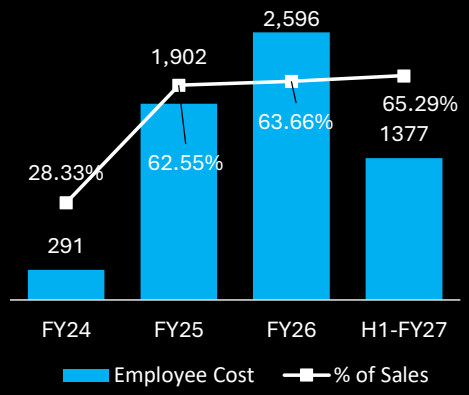
Revenue by Major Clients (%)



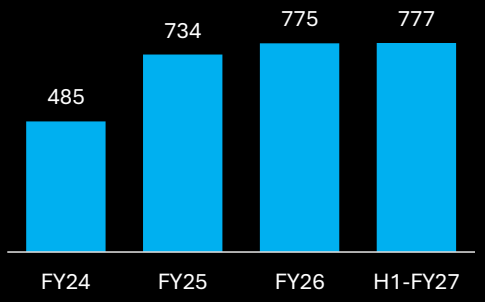
Geographical Revenue Break-up (%)



Employee Cost (INR Mn) & Employee Cost as % of Sales

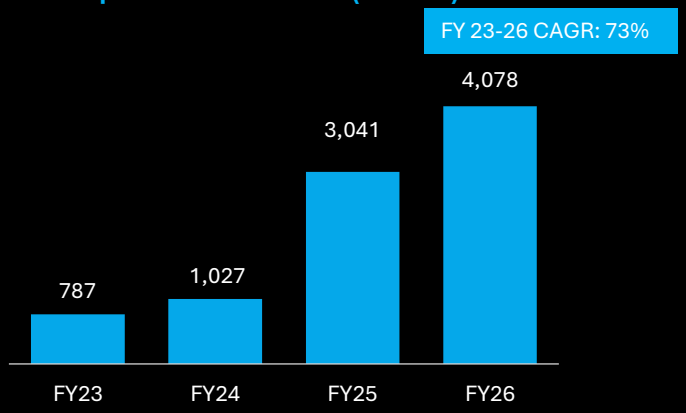


Employee Strength

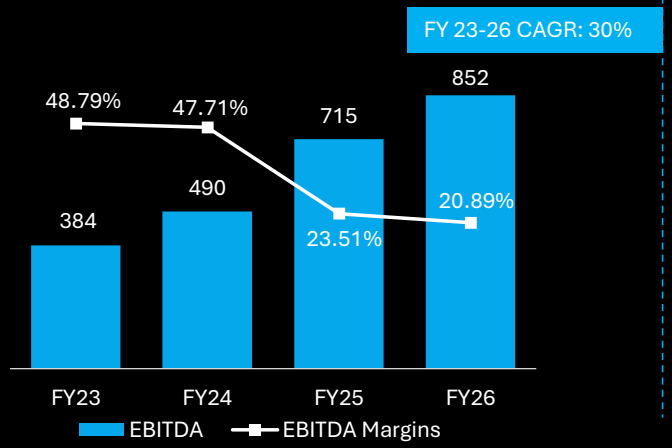


Financial Performance

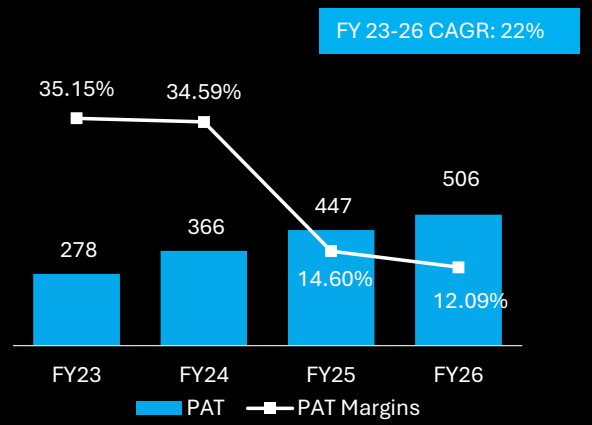
Operational Revenue (INR Mn)



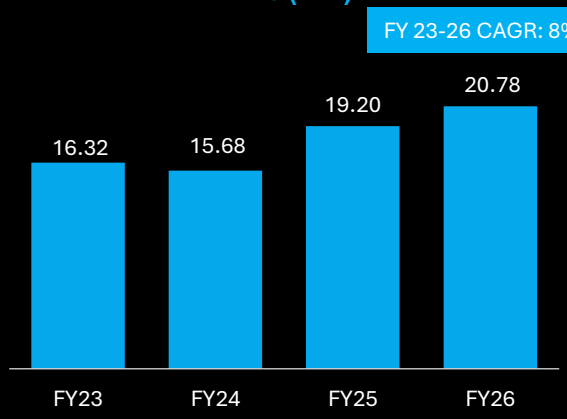
EBITDA (INR Mn) & EBITDA Margin (%)



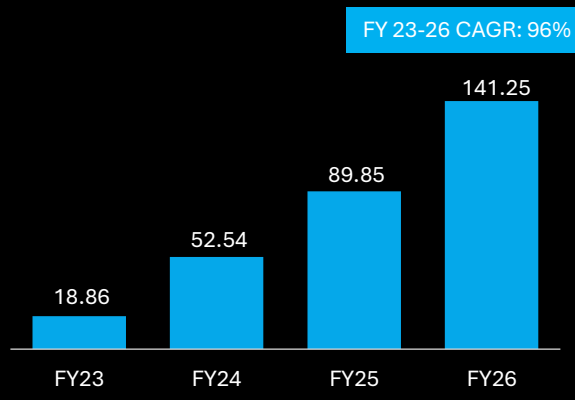
PAT (INR Mn) & PAT Margins (%)



EPS (INR)



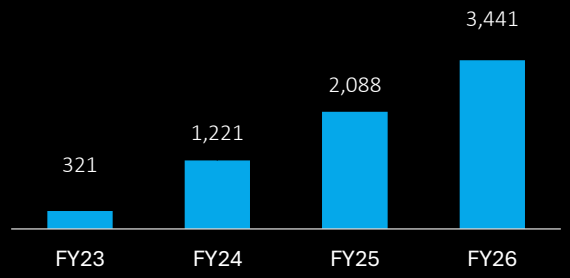
Book Value Per Share (INR)



Financial Performance

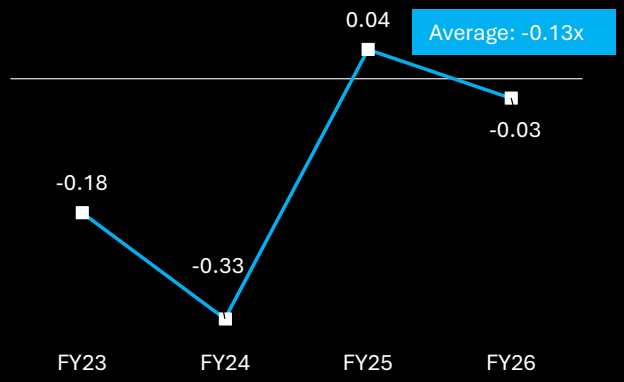
Net Worth (INR Mn)

FY 23-26 CAGR: 121%



Net Debt to Equity (x)

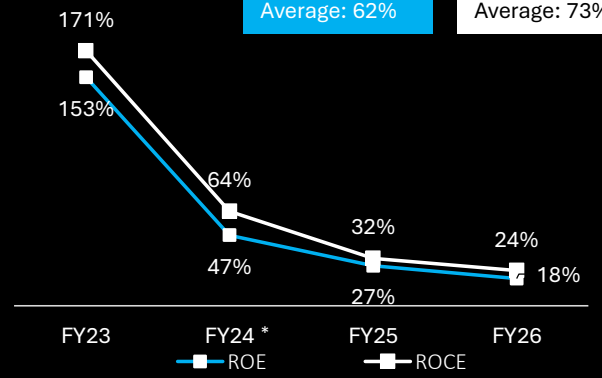
Average: -0.13x



ROE (%) & ROCE (%)

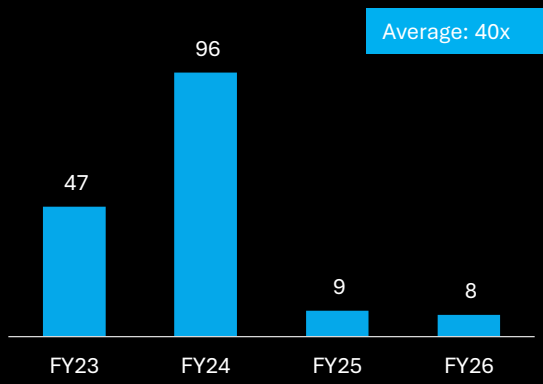
Average: 62%

Average: 73%



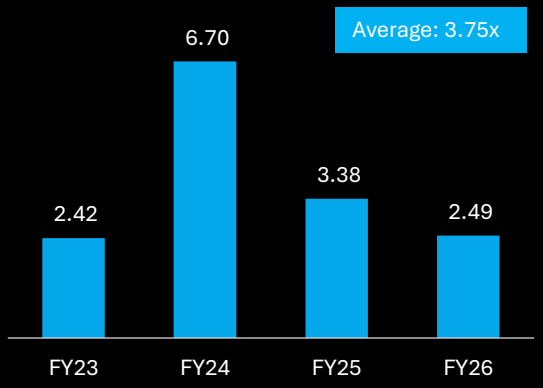
Interest Coverage Ratio (x)

Average: 40x



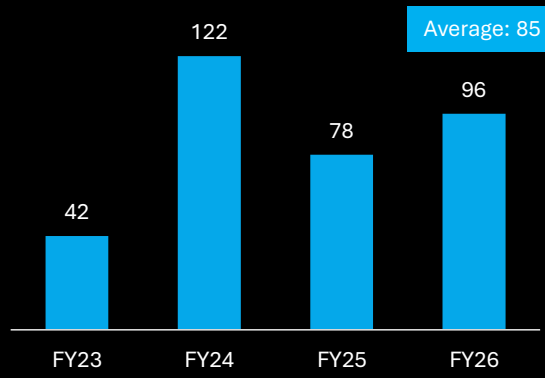
Current Ratio (x)

Average: 3.75x



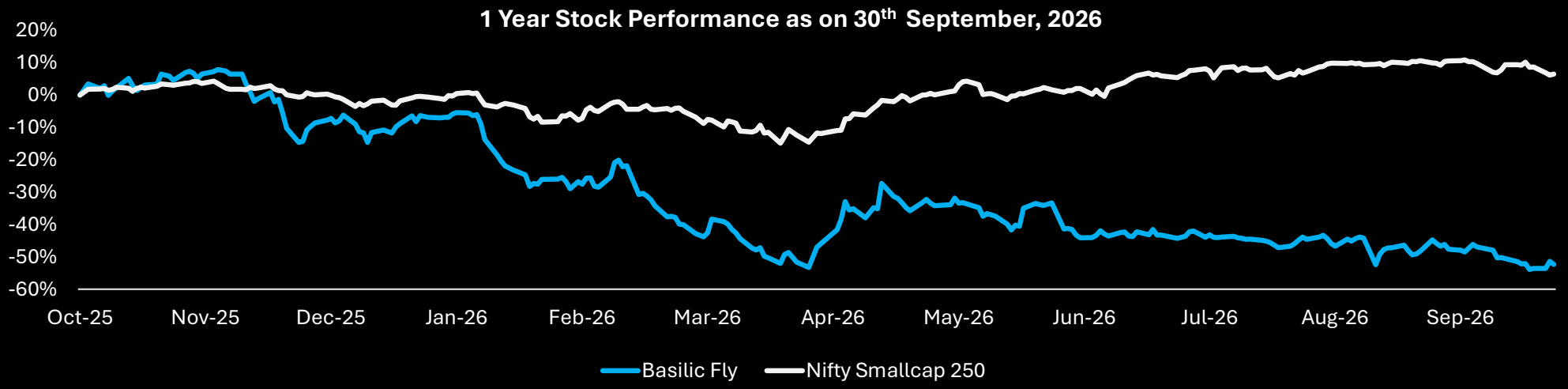
Days Sales Outstanding (DSO)

Average: 85



*ROE & ROCE includes OOU UK & Paris margins w.e.f. Jul'24 impacting ROE & ROCE % trends.

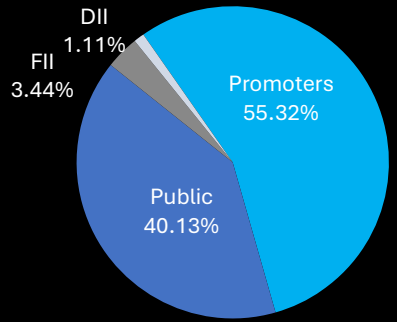
Capital Market Information



Price Data (As on 30th September, 2026)	
Face Value	10.00
CMP	171.65
52 Week H/L	394.90/161.05
Market Cap (INR Mn)	4,336.74
No. of Share outstanding (Mn)	25.27
Avg. Trading Volume ('000)	26.74



Shareholding Pattern (30th September, 2026)



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