






Basilic Fly Studio Limited

CIN : L92100TN2016PLC103861

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May 30, 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 Q4 & Financial Year 2025-26.

Pursuant to Regulation 30 of SEBI (Listing Obligation and Disclosure Requirements) Regulations 2015, please find enclosed Investor Presentation for the quarter and year ended March 31, 2026.

The aforesaid information is also being made available on the Company's website.

Thanking you,

Yours faithfully,
For Basilic Fly Studio Limited

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



Earnings Presentation

Q4-FY26/FY26

Basilic Fly Studio At Glance

13+
13+

Years of Experience

6

6 Locations
across Key Markets

775+
775+

Team Members

490+
490+

Clients

11,700+
11,700+

Projects Delivered

1,200+
1,200+

Movies Delivered

2,300+
2,300+

Series Delivered

8,160+
8,160+

Commercials
Delivered

73%
73%

3 Year Revenue
CAGR*

22%
22%

3 Year PAT CAGR*

18%
18%

ROE

24%
24%

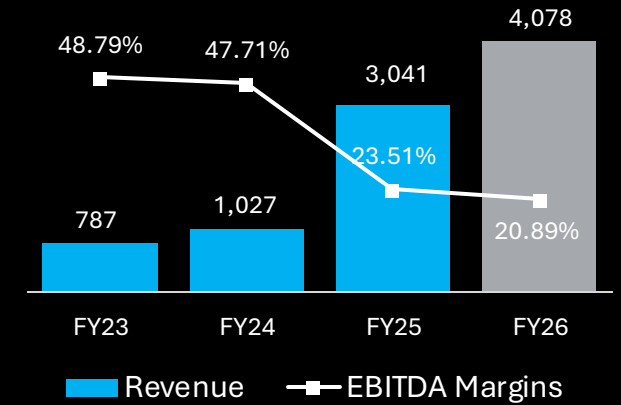
ROCE

* Figures as on FY26

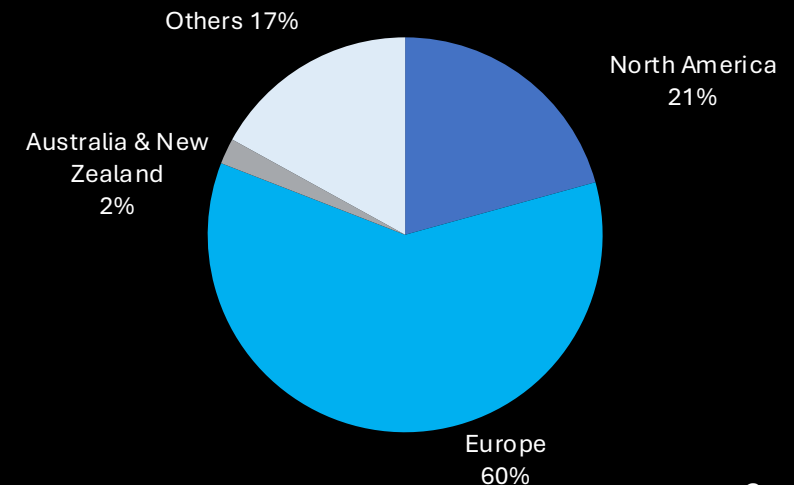
Company Overview

- Basilic Fly Studio Limited (BFS), incorporated in 2016, is a global visual effects studio providing end-to-end visual effects services for films, television series, web content, and commercials.
- The Company operates an integrated delivery model with studios across India, the United Kingdom, France, and Canada, enabling global project execution.
- Services span the full visual effects value chain, including pre-visualization, asset creation, animation, effects simulation, lighting, rendering, and final compositing.
- Basilic Fly serves leading global studios, streaming platforms, and production houses, supported by long-term client relationships and repeat business.
- The acquisition of a majority stake in One of Us (OOU) (United Kingdom) has strengthened creative capabilities, premium client access, and international market presence.
- The Company combines creative leadership in Europe, UK with cost-efficient and scalable execution in India, supporting margin expansion and delivery reliability.
- Basilic Fly is positioned to benefit from rising global demand for high-quality visual content driven by streaming platforms and large-format productions.

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



FY26 Geographical Revenue Split (%)



Building a Global VFX Network



Business Overview



What we do

- Provide complete visual effects execution services from concepts till the final pixels
- For films, television series, web content, and commercials



Who we work for

- Production houses developing film and series content
- Streaming platforms with ongoing content pipelines
- Global visual effects studios through outsourcing partnerships




How we earn

- Project-based contracts linked to scope and delivery timelines
- Commercial models include time-and-material and fixed-price arrangements



How work is executed

- Client interaction and creative supervision handled overseas
- Large-scale execution and delivery undertaken in India



Services-led, asset-light, and scalable operating model with a predominantly international revenue base

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), supported by a reinforced operations leadership team, enabling scalable execution and sustained growth.

Growth Roadmap

1

Targeted Geographic Expansion:

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

2

Scalable, Future-Ready Platform:

- Operations designed to scale without compromising quality or delivery timelines while being nimble & agile operationally
- Clear roadmap toward becoming a globally integrated VFX powerhouse

3

Established International Presence:

- Active studios in India, Paris and London supporting client-facing and creative execution along with New York, LA & Vancouver for business development
- 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



Q4-FY26/FY26 Financial Highlights



Q4-FY26 Standalone Highlights

INR 266 Mn
Revenue from
Operations
(4.3)% YoY

INR 83 Mn
Operational
EBITDA
(31.0)% YoY

31.20%
Operational
EBITDA
Margin

INR 31 Mn
PAT
(50.9)% YoY

9.54%
PAT Margin

INR 1.19
Diluted EPS

Q4-FY26 Consolidated Highlights

INR 1,134 Mn
Revenue from
Operations
(15.1)% YoY

INR 239 Mn
Operational
EBITDA
(26.7)% YoY

21.08%
Operational
EBITDA
Margin

INR 154 Mn
PAT
(24.5)% YoY

12.88%
PAT Margin

INR 6.10
Diluted EPS

FY26 Standalone Highlights

INR 1,204 Mn
Revenue from
Operations
63.8% YoY

INR 519 Mn
Operational
EBITDA
65.8% YoY

43.11%
Operational
EBITDA
Margin

INR 316 Mn
PAT
84.8% YoY

24.23%
PAT Margin

INR 12.96
Diluted EPS

FY26 Consolidated Highlights

INR 4,078 Mn
Revenue from
Operations
34.1% YoY

INR 852 Mn
Operational
EBITDA
19.2% YoY

20.89%
Operational
EBITDA
Margin

INR 506 Mn
PAT
13.2% YoY

12.09%
PAT Margin

INR 20.78
Diluted EPS

Q4 FY '26 Operational Highlights



Scale

- Delivered 410 projects for 108 global clients across FY '26.
- Executed 624 movies and series, reinforcing industrial-scale delivery capability.
- Established as a trusted Tier-1 VFX partner across diverse production scales.

Sales Pipeline

- Current active bid pipeline of £35M heading into the next fiscal year.
- Approximately 55% of the pipeline is already at an advanced stage of conversion.
- **Domestic OTT Diversification:** Q1 FY'27 domestic sales revenue has already crossed ~2x of full-year FY'26 revenue.

Cost edge

- Achieved a 30–40% structural cost advantage through India-led delivery.
- Migrated roles from UK and EU bases to India, with Bengaluru expansion underway.
- This transition is expected to drive durable margin expansion over the coming years.

Credentials

- Secured TPN Gold certification for Chennai and Pune facilities through 2028, along with Red team Assessment and real time Dark web monitoring is in place.
- These certifications meet the highest content security standards required by major studios.

Network

- Expanded the partner studio ecosystem to over 35 collaborating studios globally, to enable asset light scaling without taking on fixed cost burden.
- The model protects downside while preserving the ability to flex capacity rapidly.

Technology

- Deployed AI-led production workflows using ComfyUI across active pipelines.
- These tools are driving measurable per-shot cost compression and faster turnaround.
- Migrated to owned NetApp enterprise infrastructure to reduce long-term cloud dependency.
- USD architecture by Q2 FY27 - currently in testing phase, deployment on production soon, Cross-application interoperability between sites
- TPN Gold certification — Chennai & Pune, along with Stella award (6th studio globally to get the award this year) - Disney on-site audit validates Tier-1 security posture.

Revenue mix

- Onboarded Netflix and Amazon for full-length domestic OTT mandates.
- This marks a breakthrough into the high-growth Indian streaming market.
- Domestic OTT diversifies revenue away from global streaming volatility.

Awards

- Earned 3 Academy Award nomination listings in Top20 during the FY '26 cycle.
- These recognitions reinforce the company's marquee creative credentials.
- Award-level work strengthens positioning when bidding for Tier-1 studio engagements.

People

- Scaled total headcount to over 780, with India leading the expansion.
- Achieved a 90% absorption rate through internal bootcamps and university partnerships.
- This significantly reduces dependency on expensive external hiring markets.
- Added Abishek Nair, Global creative head (ex-ILM), Yamuna Bai, CHRO (ex-Sun tv networks), Selvakumar, VFX Supervisor (Seasoned client-side Supervisor)

Quarterly Standalone Profit & Loss Statement

| Particulars (INR Mn) | Q4-FY26 | Q4-FY25 | Y-o-Y | Q3-FY26 | Q-o-Q |
|--------------------------------------|---------------|---------------|--------------------|---------------|--------------------|
| Revenue from Operations | 266 | 278 | (4.3)% | 394 | (32.5)% |
| Operating Expenses | 183 | 158 | 15.8% | 226 | (19.0)% |
| Operating EBITDA | 83 | 120 | (30.8)% | 168 | (50.6)% |
| Operating EBITDA Margins (%) | 31.20% | 43.17% | (1,196) Bps | 42.64% | (1,144) Bps |
| Depreciation & Amortisation Expenses | 32 | 14 | 128.6% | 22 | 45.5% |
| Finance Costs | 27 | 16 | 68.8% | 14 | 92.9% |
| Other Income | 59 | 5 | NA | 30 | 96.7% |
| Exceptional Items | - | 3 | NA | - | NA |
| PBT | 83 | 92 | (9.8)% | 162 | (48.8)% |
| Tax | 52 | 29 | 79.3% | 46 | 13.0% |
| Profit after Tax | 31 | 63 | (50.8)% | 116 | (73.3)% |
| PAT Margins (%) | 9.54% | 22.26% | (1,272) Bps | 27.36% | (1,782) Bps |
| Diluted EPS (INR) | 1.19 | 2.74 | (56.6%) | 4.58 | (74.0)% |

Annual Standalone Profit & Loss Statement

| Particulars (INR Mn) | FY26 | FY25 | Y-o-Y |
|--------------------------------------|---------------|---------------|----------------|
| Revenue from Operations | 1,204 | 735 | 63.8% |
| Operating Expenses | 685 | 422 | 62.3% |
| Operating EBITDA | 519 | 313 | 65.8% |
| Operating EBITDA Margins (%) | 43.11% | 42.59% | 52 Bps |
| Depreciation & Amortisation Expenses | 82 | 55 | 49.1% |
| Finance Costs | 63 | 35 | 80.0% |
| Other Income | 100 | 19 | 426.3% |
| Exceptional Items | - | 3 | NA |
| PBT | 474 | 239 | 98.3% |
| Tax | 158 | 68 | 132.4% |
| Profit after Tax | 316 | 171 | 84.8% |
| PAT Margins (%) | 24.23% | 22.68% | 155 Bps |
| Diluted EPS (INR) | 12.96 | 7.51 | 72.6% |

Quarterly Consolidated Profit & Loss Statement

| Particulars (INR Mn) | Q4-FY26 | Q4-FY25 | Y-o-Y | Q3-FY26 | Q-o-Q |
|--------------------------------------|---------------|---------------|------------------|---------------|----------------|
| Revenue from Operations | 1,134 | 1,336 | (15.1)% | 1,050 | 8.0% |
| Operating Expenses | 895 | 1,010 | (11.4)% | 873 | 2.5% |
| Operating EBITDA | 239 | 326 | (26.7)% | 177 | 35.0% |
| Operating EBITDA Margins (%) | 21.08% | 24.40% | (333) Bps | 16.86% | 422 Bps |
| Depreciation & Amortisation Expenses | 53 | 35 | 51.4% | 42 | 26.2% |
| Finance Costs | 39 | 26 | 50.0% | 22 | 77.3% |
| Other Income | 62 | 5 | NA | 26 | 138.5% |
| Exceptional Items | 2 | 40 | (95.0)% | 1 | 100.0% |
| PBT | 207 | 230 | (10.0)% | 138 | 50.0% |
| Tax | 53 | 26 | 103.8% | 49 | 8.2% |
| Profit after Tax | 154 | 204 | (24.5)% | 89 | 73.0% |
| PAT Margins (%) | 12.88% | 15.21% | (234) Bps | 8.27% | 460 Bps |
| Diluted EPS (INR) | 6.10 | 8.76 | (30.4)% | 3.49 | 74.8% |

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

FY23 numbers are based on IGAAP.

Annual Consolidated Profit & Loss Statement

| Particulars (INR Mn) | FY26 | FY25 | Y-o-Y |
|--------------------------------------|---------------|---------------|------------------|
| Revenue from Operations | 4,078 | 3,041 | 34.1% |
| Operating Expenses | 3,226 | 2,326 | 38.7% |
| Operating EBITDA | 852 | 715 | 19.2% |
| Operating EBITDA Margins (%) | 20.89% | 23.51% | (262) Bps |
| Depreciation & Amortisation Expenses | 163 | 122 | 33.6% |
| Finance Costs | 101 | 63 | 60.3% |
| Other Income | 106 | 21 | 404.8% |
| Exceptional Items | 32 | 40 | (20.0)% |
| PBT | 662 | 511 | 29.5% |
| Tax | 156 | 64 | 143.8% |
| Profit after Tax | 506 | 447 | 13.2% |
| PAT Margins (%) | 12.09% | 14.60% | (250) Bps |
| Diluted EPS (INR) | 20.78 | 19.20 | 8.2% |

Standalone Profit & Loss Statement

| Particulars (INR Mn) | FY23# | FY24 | FY25 | FY26 |
|--------------------------------------|---------------|---------------|---------------|---------------|
| Revenue from Operations | 702 | 1,003 | 735 | 1,204 |
| Operating Expenses | 337 | 516 | 422 | 685 |
| Operating EBITDA | 365 | 487 | 313 | 519 |
| Operating EBITDA Margins (%) | 51.99% | 48.55% | 42.59% | 43.11% |
| Depreciation & Amortisation Expenses | 6 | 10 | 55 | 82 |
| Finance Costs | 8 | 5 | 35 | 63 |
| Other Income | 3 | 29 | 19 | 100 |
| Exceptional Items | 0 | 0 | 3 | - |
| PBT | 354 | 501 | 239 | 474 |
| Tax | 90 | 140 | 68 | 158 |
| Profit after Tax | 264 | 361 | 171 | 316 |
| PAT Margins (%) | 37.45% | 34.98% | 22.68% | 24.23% |
| Diluted EPS (INR) | 15.55 | 15.51 | 7.51 | 12.96 |

Standalone Balance Sheet

| Particulars (INR Mn) | FY24 | FY25 | FY26 |
|----------------------------------|--------------|--------------|--------------|
| ASSETS | | | |
| Non-Current Assets | | | |
| Property, Plant & Equipment | 18 | 11 | 98 |
| Capital work in progress | - | - | 174 |
| Goodwill | - | - | - |
| Right of use assets | 151 | 104 | 239 |
| Deferred Tax Assets (Net) | 11 | 15 | 9 |
| Financial assets - Investments | 63 | 468 | 473 |
| Other financial assets | 41 | 16 | 336 |
| Total Non- Current Assets | 284 | 614 | 1,329 |
| Current Assets | | | |
| Trade Receivables | 629 | 861 | 996 |
| Cash and Bank Balances | 405 | 174 | 568 |
| Short term loans and advances | - | - | - |
| Current Tax Asset (Net) | - | - | - |
| Other Current Assets | 291 | 408 | 993 |
| Total Current Assets | 1,325 | 1,443 | 2,557 |
| TOTAL ASSETS | 1,609 | 2,057 | 3,886 |

| Particulars (INR Mn) | FY24 | FY25 | FY26 |
|--------------------------------------|--------------|--------------|--------------|
| EQUITY AND LIABILITIES | | | |
| Equity | | | |
| Equity share capital | 232 | 232 | 253 |
| Reserves and Surplus | 966 | 1,147 | 2,268 |
| Minority Interest | - | - | - |
| Shareholder's Funds | 1,198 | 1,379 | 2,521 |
| Long term borrowings | 6 | 175 | 145 |
| Long-term Lease liabilities | 124 | 74 | 184 |
| Long Term Provisions | 30 | 33 | 21 |
| Deferred tax liabilities (net) | - | - | - |
| Total Non Current Liabilities | 160 | 282 | 350 |
| Short term Borrowings | 19 | 153 | 382 |
| Short-term Lease liabilities | 43 | 51 | 71 |
| Trade Payables | 116 | 84 | 332 |
| Other financial liabilities | 26 | 28 | 53 |
| Short Term Provisions | 41 | 73 | 168 |
| Other Current Liabilities | 6 | 7 | 9 |
| Total Current Liabilities | 251 | 396 | 1,015 |
| Total Equity and Liabilities | 1,609 | 2,057 | 3,886 |

Standalone Cash Flow Statement

| Particulars (INR Mn) | FY24 | FY25 | FY26 |
|--|--------------|-------------|------------|
| CASH FLOWS FROM OPERATING ACTIVITIES: | | | |
| Net Profit Before Tax | 502 | 239 | 474 |
| Adjustments for: | | | |
| Depreciation and amortisation expense | 11 | 55 | 82 |
| Provision for expected credit loss | - | 4 | 5 |
| Interest Expense on lease liabilities | - | 13 | 9 |
| Foreign Exchange (Gain)/Loss | - | (13) | (61) |
| Unwinding of interest on Security deposit | - | (1) | (1) |
| Profit on Sale of Fixed Assets | - | - | - |
| Interest Income | (24) | (5) | (29) |
| Interest Expenses | 5 | 21 | 54 |
| Operating Profit before working capital changes | 493 | 313 | 533 |
| Adjustments for changes in working capital: | | | |
| (Increase)/ decrease in trade receivables | (431) | (223) | (79) |
| (Increase)/ decrease in Other financial assets | - | 27 | 1 |
| (Increase)/ decrease in Other Current assets | (199) | - | - |
| (Increase)/ decrease in Other Non-current assets | (7) | (117) | (585) |
| Increase/(decrease) in Long term Provisions | 11 | 2 | (12) |
| Increase/(decrease) in Short term Provisions | - | 9 | 19 |
| Increase/(decrease) in trade payables | 90 | (32) | 248 |
| Increase/(decrease) in Other Financial liabilities | - | 1 | 25 |
| Increase/(decrease) in Other current liabilities | (5) | - | 3 |
| Cash generated from operations | (48) | (20) | 153 |
| Income Taxes paid | (164) | (39) | (62) |
| Cash flow before extraordinary item | (212) | (59) | 91 |
| Extraordinary items | - | - | - |
| NET CASH FROM OPERATING ACTIVITES (A) | (212) | (59) | 91 |

| Particulars (INR Mn) | FY24 | FY25 | FY26 |
|---|--------------|--------------|--------------|
| CASH FLOWS FROM INVESTING ACTIVITIES | | | |
| Interest Received | 24 | 5 | 29 |
| (Increase)/Decrease in Bank Deposits | (337) | 268 | (239) |
| Fixed assets purchased including Intangible Assets | (5) | (0) | (296) |
| Loan given to related party | - | 0 | (246) |
| Investments | (42) | (405) | (5) |
| NET CASH USED IN INVESTING ACTIVITIES (B) | (360) | (132) | (757) |
| CASH FLOWS FORM FINANCING ACTIVITES | | | |
| Interest paid | (5) | (21) | (54) |
| Increase/(Decrease) in Long-Term Borrowings | (20) | 170 | (30) |
| Net Proceeds from issue of equity shares | 549 | - | 811 |
| Increase/(Decrease) in Short-Term Borrowings | 1 | 135 | 228 |
| Principle repayment of lease liabilities | - | (43) | (50) |
| Interest paid on lease liabilities | - | (13) | (9) |
| NET CASH USED IN FINANCING ACTIVITIES (C) | 526 | 228 | 896 |
| NET INCREASE IN CASH AND CASH EQUIVALENT (A+B+C) | (47) | 37 | 230 |
| Opening Cash and Cash Equivalents | 54 | 7 | 44 |
| CLOSING CASH AND CASH EQUIVALENT | 7 | 44 | 274 |

Consolidated Profit & Loss Statement

| Particulars (INR Mn) | FY23# | FY24 | FY25 | FY26 |
|--------------------------------------|---------------|---------------|---------------|---------------|
| Revenue from Operations | 787 | 1,027 | 3,041 | 4,078 |
| Operating Expenses | 403 | 537 | 2,326 | 3,226 |
| Operating EBITDA | 384 | 490 | 715 | 852 |
| Operating EBITDA Margins (%) | 48.79% | 47.71% | 23.51% | 20.89% |
| Depreciation & Amortisation Expenses | 6 | 10 | 122 | 163 |
| Finance Costs | 8 | 5 | 63 | 101 |
| Other Income | 4 | 31 | 21 | 106 |
| Exceptional Items | - | - | 40 | 32 |
| PBT | 374 | 506 | 511 | 662 |
| Tax | 96 | 140 | 64 | 156 |
| Profit after Tax | 278 | 366 | 447 | 506 |
| PAT Margins (%) | 35.15% | 34.59% | 14.60% | 12.09% |
| Diluted EPS (INR) | 16.32 | 15.68 | 19.20 | 20.78 |

Consolidated Balance Sheet

| Particulars (INR Mn) | FY24 | FY25 | FY26 |
|----------------------------------|--------------|--------------|--------------|
| ASSETS | | | |
| Non-Current Assets | | | |
| Property, Plant & Equipment | 19 | 179 | 218 |
| Capital work in progress | - | - | 597 |
| Intangible Assets | - | 775 | 775 |
| Right of use assets | 151 | 277 | 388 |
| Deferred Tax Assets (Net) | 12 | 17 | 22 |
| Financial assets - Investments | - | - | - |
| Other financial assets | 41 | 49 | 129 |
| Total Non- Current Assets | 223 | 1,297 | 2,129 |
| Current Assets | | | |
| Trade Receivables | 531 | 772 | 1,382 |
| Cash and Bank Balances | 428 | 428 | 739 |
| Short term loans and advances | - | - | - |
| Current Tax Asset (Net) | - | - | - |
| Other Current Assets | 402 | 869 | 1,119 |
| Total Current Assets | 1,361 | 2,070 | 3,240 |
| TOTAL ASSETS | 1,584 | 3,366 | 5,369 |

| Particulars (INR Mn) | FY24 | FY25 | FY26 |
|--------------------------------------|--------------|--------------|--------------|
| EQUITY AND LIABILITIES | | | |
| Equity | | | |
| Equity share capital | 232 | 232 | 253 |
| Reserves and Surplus | 985 | 1,772 | 3,086 |
| Minority Interest | 4 | 84 | 102 |
| Shareholder's Funds | 1,221 | 2,088 | 3,441 |
| Long term borrowings | 6 | 357 | 263 |
| Long-term Lease liabilities | 124 | 238 | 329 |
| Long Term Provisions | 30 | 44 | 34 |
| Deferred tax liabilities (net) | 0 | 27 | - |
| Total Non Current Liabilities | 160 | 666 | 626 |
| Short term Borrowings | 19 | 155 | 384 |
| Short-term Lease liabilities | 43 | 67 | 89 |
| Trade Payables | 60 | 38 | 236 |
| Other financial liabilities | 32 | 44 | 59 |
| Short Term Provisions | 42 | 74 | 206 |
| Other Current Liabilities | 7 | 234 | 328 |
| Total Current Liabilities | 203 | 612 | 1,302 |
| Total Equity and Liabilities | 1,584 | 3,366 | 5,369 |

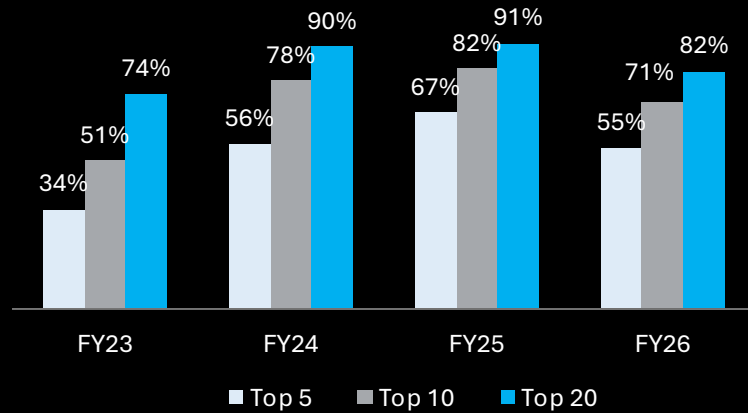
Consolidated Cash Flow Statement

| Particulars (INR Mn) | FY24 | FY25 | FY26 |
|--|--------------|------------|------------|
| CASH FLOWS FROM OPERATING ACTIVITIES: | | | |
| Net Profit Before Tax | 506 | 511 | 662 |
| Adjustments for: | | | |
| Depreciation and amortisation expense | 11 | 122 | 163 |
| Provision for expected credit loss | - | 4 | 8 |
| Interest Expense on lease liabilities | - | 22 | 16 |
| Foreign Exchange (Gain)/Loss | - | 13 | 73 |
| Unwinding of interest on Security deposit | - | (1) | (1) |
| Interest Income | (24) | (7) | (31) |
| Interest Expenses | 5 | 41 | 85 |
| Operating Profit before working capital changes | 498 | 705 | 975 |
| Adjustments for changes in working capital: | | | |
| (Increase)/ decrease in trade receivables | (376) | (258) | (674) |
| (Increase)/ decrease in Other financial assets | (39) | (7) | (78) |
| (Increase)/ decrease in Other Non-current assets | (210) | (468) | (249) |
| Increase/(decrease) in Long term Provisions | 11 | 14 | (10) |
| Increase/(decrease) in Short term Provisions | (7) | 9 | 19 |
| (Increase)/ decrease in Other current assets | 19 | - | - |
| Increase/(decrease) in trade payables | (5) | (23) | 198 |
| Increase/(decrease) in Other Financial liabilities | - | 13 | 15 |
| Increase/(decrease) in Other current liabilities | - | 227 | 95 |
| Increase/(decrease) in Other Non-current liabilities | - | 27 | (21) |
| Cash generated from operations | (108) | 239 | 270 |
| Income Taxes paid | (170) | (39) | (41) |
| Cash flow before extraordinary item | (279) | 200 | 229 |
| Extraordinary items | - | - | - |
| NET CASH FROM OPERATING ACTIVITES (A) | (279) | 200 | 229 |

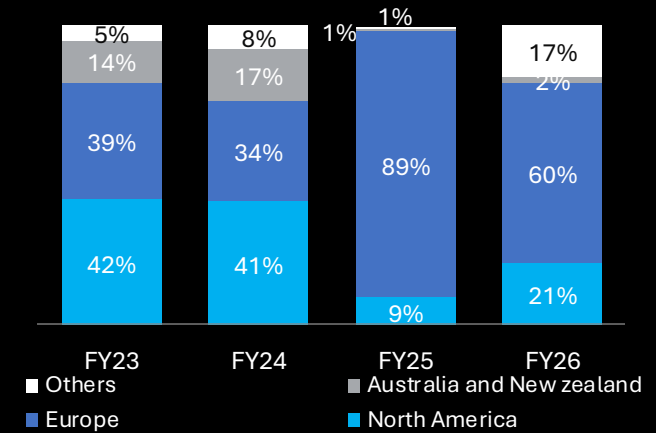
| Particulars (INR Mn) | FY24 | FY25 | FY26 |
|---|--------------|--------------|--------------|
| CASH FLOWS FROM INVESTING ACTIVITIES | | | |
| Interest Received | 24 | 7 | 31 |
| (Increase)/Decrease in Bank Deposits | (337) | 268 | (164) |
| Purchase of Goodwill | - | (775) | - |
| Fixed assets purchased including Intangible Assets | (7) | (222) | (730) |
| Increase/(Decrease) in Other Non-Current Investments | - | - | - |
| NET CASH USED IN INVESTING ACTIVITIES (B) | (319) | (722) | (863) |
| CASH FLOWS FORM FINANCING ACTIVITES | | | |
| Interest paid | (5) | (41) | (85) |
| Increase/(Decrease) in Long-Term Borrowings | (20) | 351 | (94) |
| Net Proceeds from issue of equity shares | 549 | 415 | 817 |
| Increase/(Decrease) in Short-Term Borrowings | 1 | 137 | 229 |
| Principle repayment of lease liabilities | - | (48) | (69) |
| Interest paid on lease liabilities | - | (22) | (16) |
| NET CASH USED IN FINANCING ACTIVITIES (C) | 526 | 792 | 782 |
| Exchange difference on Realized (Loss)/Gain | | (2) | (1) |
| NET INCREASE IN CASH AND CASH EQUIVALENT (A+B+C) | (72) | 270 | 148 |
| Opening Cash and Cash Equivalents | 102 | 30 | 298 |
| CLOSING CASH AND CASH EQUIVALENT | 30 | 298 | 445 |

Key Performance Metrics

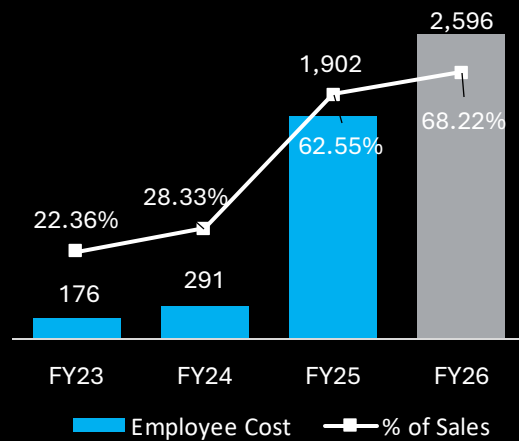
Revenue by Major Clients (%)



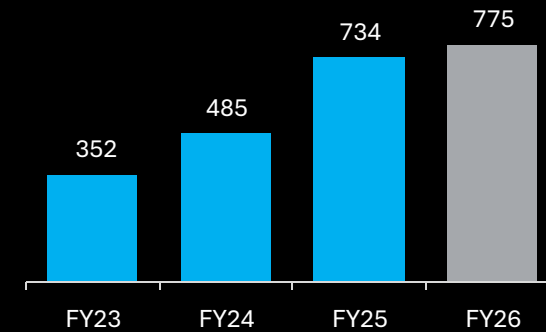
Geographical Revenue Break-up (%)



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

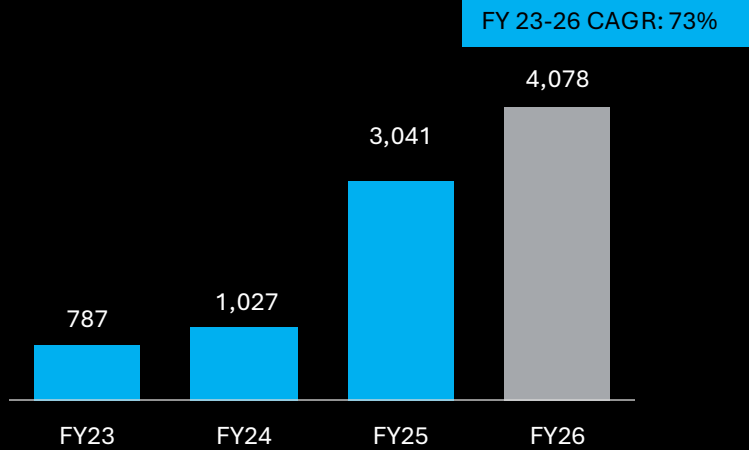


Employee Strength

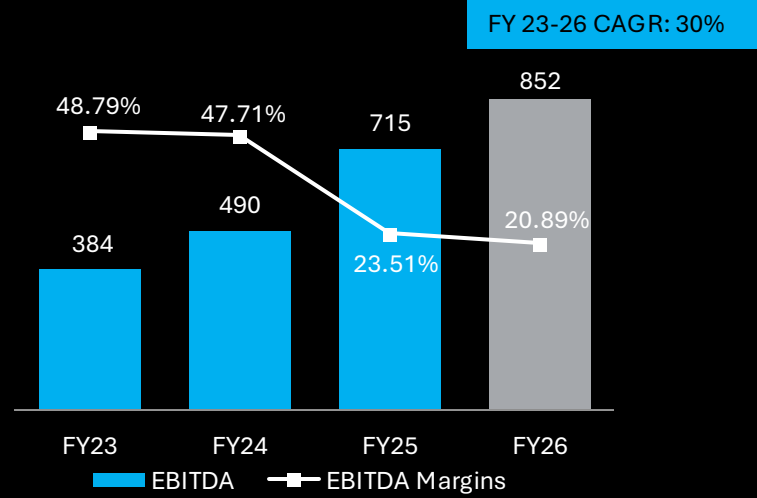


Financial Performance

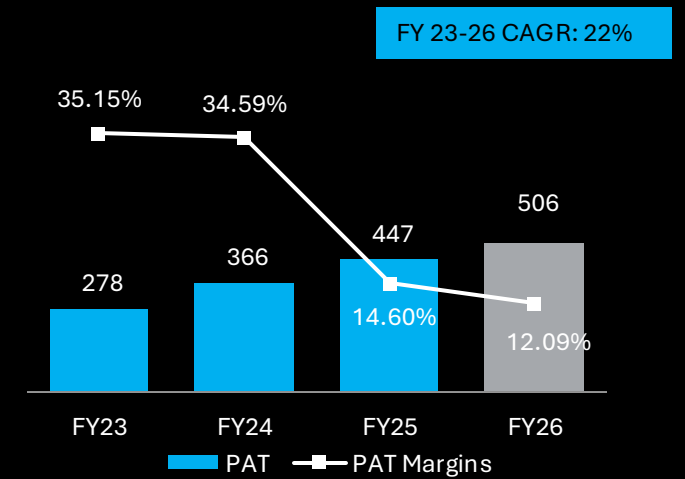
Operational Revenue (INR Mn)



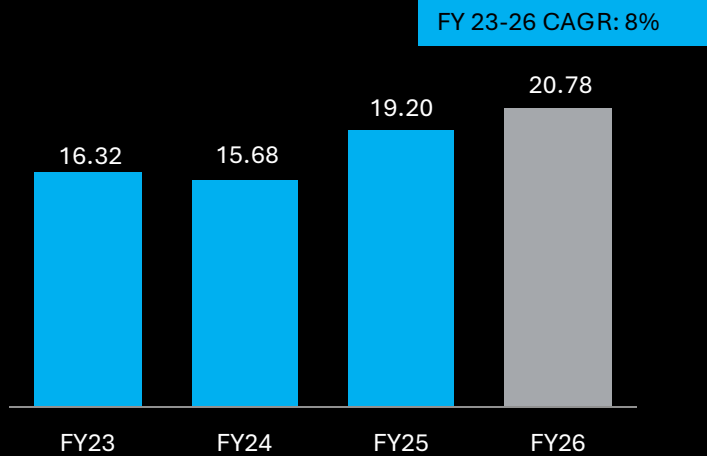
EBITDA (INR Mn) & EBITDA Margin (%)



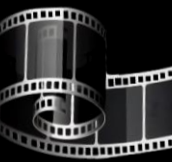
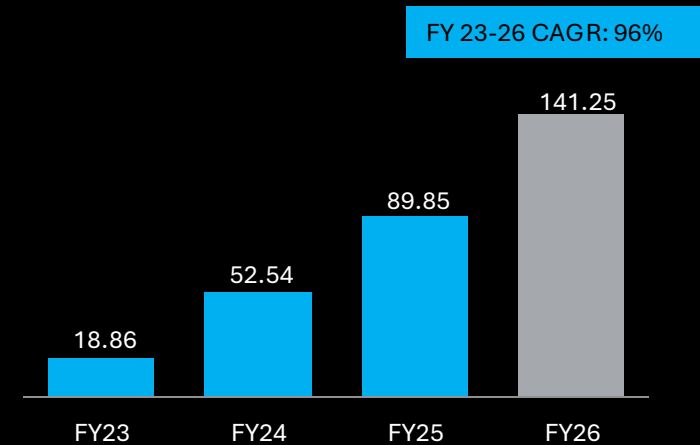
PAT (INR Mn) & PAT Margins (%)



EPS (INR)



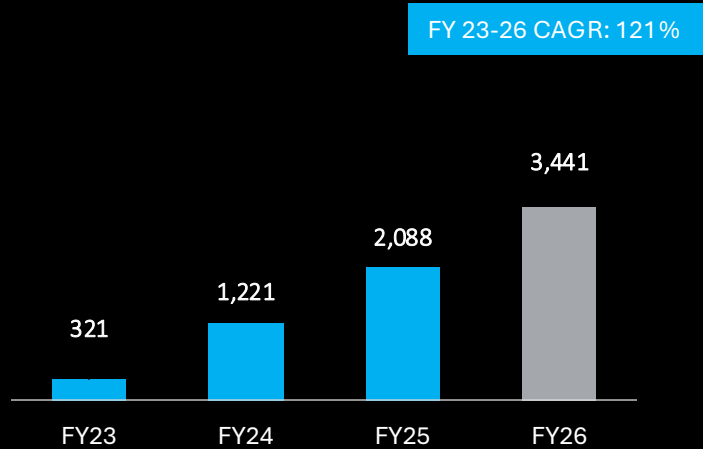
Book Value Per Share (INR)



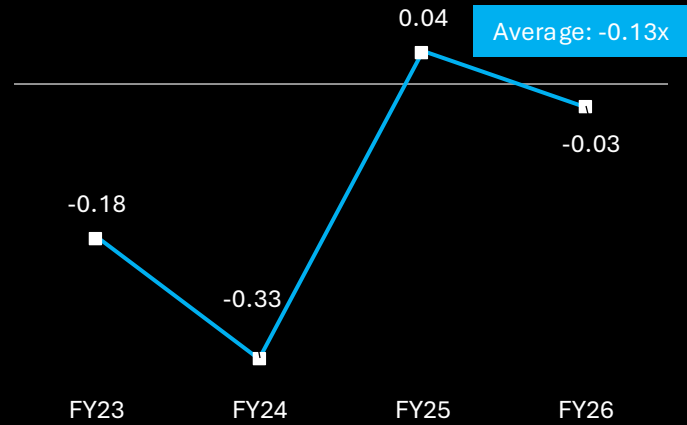
Financial Performance



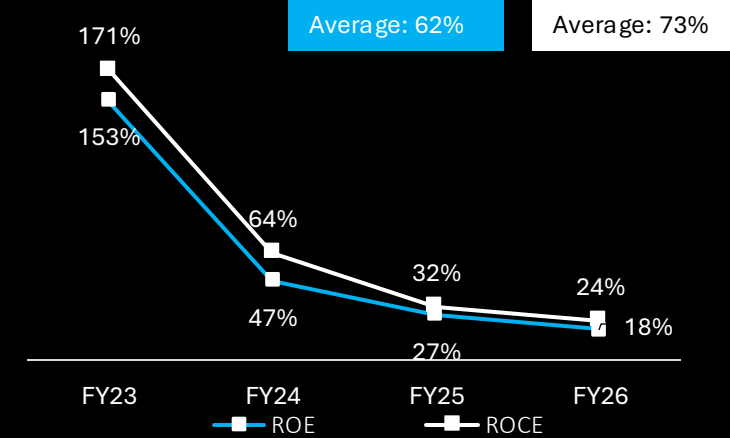
Net Worth (INR Mn)



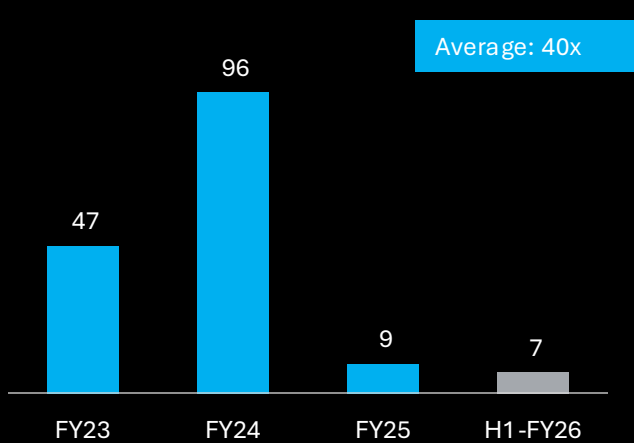
Net Debt to Equity (x)



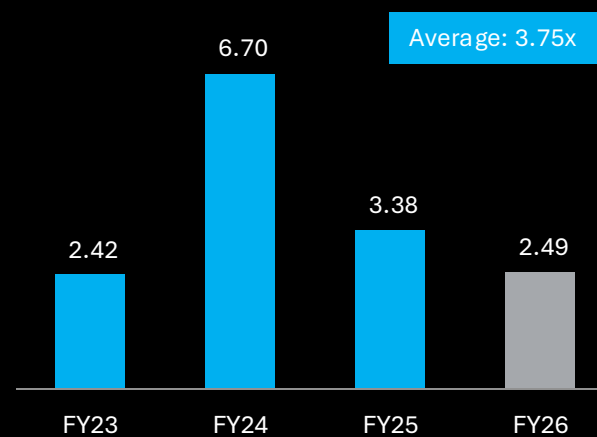
ROE (%) & ROCE (%)



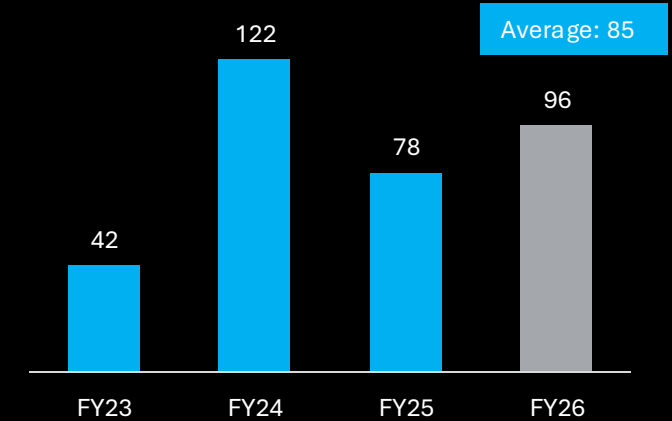
Interest Coverage Ratio (x)



Current Ratio (x)



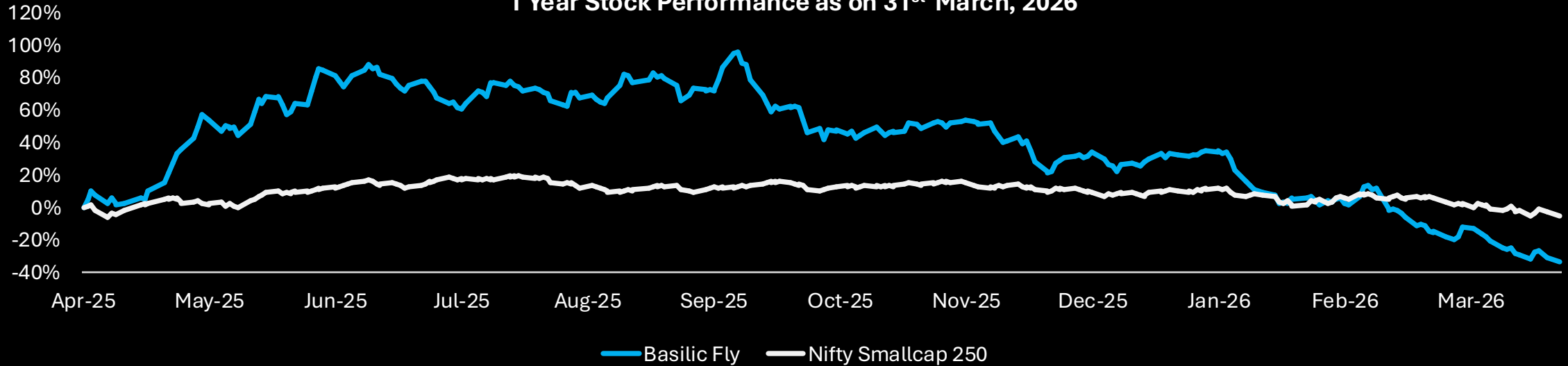
Days Sales Outstanding (DSO)



*Calculation is on an annualised basis.

Capital Market Information

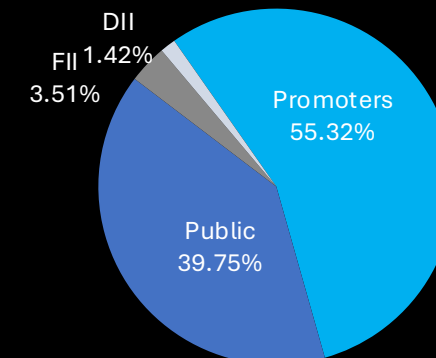
1 Year Stock Performance as on 31st March, 2026



| Price Data (As on 31 st March, 2026) | |
|---|---------------|
| Face Value | 10.00 |
| CMP | 168.35 |
| 52 Week H/L | 509.80/166.25 |
| Market Cap (INR Mn) | 4,253.36 |
| No. of Share outstanding (Mn) | 25.27 |
| Avg. Trading Volume ('000) | 39.84 |



Shareholding Pattern (31st March, 2026)



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