



Date: 20 August 2026

To,
The Manager
Listing Department
National Stock Exchange of India Limited
Exchange Plaza, C-1, Block G,
Bandra Kurla Complex, Bandra (East),
Mumbai – 400051

Subject: Submission of Investor Presentation

Dear Sir/Madam,

We wish to inform you that **Credent Connect N Care Limited** (the “Company”) is listed on the **NSE Emerge Platform** of the National Stock Exchange of India Limited.

Pursuant to the applicable provisions of the **SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015**, the Company hereby submits its **Investor Presentation** for the information of the investors, stakeholders and general public.

The Investor Presentation provides an overview of the Company, its business operations, financial performance, business strategy, growth prospects and other relevant information relating to the Company.

The aforesaid Investor Presentation is also being made available on the **website of the Company**.

You are requested to kindly take the same on record and disseminate the same on the Exchange's website.

Thanking You,

For Credent Connect N Care Limited

CS Arpita Abhilasha
Company Secretary & Compliance Officer

Encl.: Investor Presentation





Your sample, Our trusted network

VISION 203 →

Building India's Integrated
Pre-Analytics & Temperature-Controlled
Healthcare Supply Chain Ecosystem



Sample
Collection



Cold Chain
Logistics



Pan-India
Network



Tech-Enabled
Platform



Trusted By
Leading Labs

NSE EMERGE
LISTED COMPANY



Company Overview



Last mile phlebotomy services across India
for diagnostics, hospitals & healthcare enterprises

KEY METRICS



2500+

Laboratories
Associated



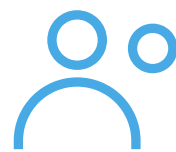
2-8°C

Temperature
Precision
Cold Chain



14+ Yrs

In Operations
Trusted Nationwide



6000+

Field Force
Pan India

FY 2026

REVENUE

Rs. 214.16 Cr

PAT

Rs. 18.4 Cr
(8.6%)

ROE

61.81%

EBITDA

Rs. 28.46 Cr
(13.29%)

NET WORTH

Rs. 43.8 Cr

ROCE

40.00%

THE CREDENT 7-STEP SAMPLE JOURNEY

1

Assign
Nearest
Phlebotomist

2

Book
Sample
Booking

3

Collect
At-Home/
Centre

4

Preserve
Pack & Keep
Cold (2-8°C)

5

Transport
Secure &
Timely Transit

6

Deliver
On-Time
to Lab

7

Track & Assure
Live Tracking &
Exceptions

Services offered



Healthcare Logistics

Integrated intra-city and inter-city medical logistics across air, rail and road, including 2–8°C cold chain and end-to-end first-mile to last-mile delivery with real-time tracking.



Diagnostic & Paramedical Services

Home sample collection & stationed phlebotomy services, including Preventive Health Checkups, supporting timely & patient-centric diagnostic services across India.



Operations & Supply Chain

Management and Digital Platforms
Trained laboratory technicians and field executives supported by C3 HRMS and Connect N Grow for workforce management, training and operational oversight.

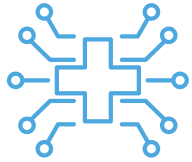


Corporate Wellness

Corporate wellness solutions focused on preventive health checkups and employee wellness programs through on-site and mobile health solutions.



Services offered



C3 Post

Technology-enabled courier aggregation through C3 Post, enabling multiple courier partners through a single interface for shipment booking, automated partner selection, real-time tracking, proof of delivery and consolidated billing, including temperature-controlled & time-sensitive healthcare logistics.



IT Services

Laboratory information and ancillary application support services for diagnostic centres, hospitals and healthcare institutions, including backend technical support, software-related operational support, troubleshooting, system integration & on-site technical assistance.



Marketing Services

Marketing and healthcare outreach services through medical camps, healthcare awareness programs and community engagement across RWAs, corporate offices and local communities, supporting brand visibility and patient outreach.



Professional Services

Professional support services for diagnostic laboratories and healthcare institutions through deployment and coordination of doctors, pathologists and medical professionals for supervision, pathology review, report validation, consultation and regulatory support.



Service-wise Revenue Bifurcation

(₹ in lakhs)

Particulars	Consolidated		Standalone		Standalone	
	FY 2025-26	%	FY 2024-25	%	FY 2023-24	%
Logistics Services	5,410.66	25.26%	5,042.15	64.69%	2,943.82	38.87%
Operations & Supply Chain Management	5,338.30	24.93%	1,014.42	13.01%	2,541.14	33.55%
Health Care Services	9,218.18	43.04%	949.20	12.18%	1,480.87	19.55%
Marketing Services	589.76	2.75%	510.17	6.55%	414.91	5.48%
IT Services	600.95	2.81%	200.00	2.57%	190.00	2.51%
Corporate & Wellness (Camp)	18.09	0.08%	14.06	0.18%	2.58	0.03%
Professional Fees	35.25	0.16%	64.27	0.82%	-	-
Sale of IT software product	205.00	0.96%	-	-	-	-
Total	21,416.18	100%	7,794.26	100%	7,573.32	100%



Business Process

(Patient Booking to Logistics Handover)



Patient Booking

- ✓ Call Center / App / Website
- ✓ Patient & test details captured



Geo / Pincode Mapping Engine

- ✓ Area-wise phlebotomist tagging
- ✓ Pincode & micro-cluster logic
- ✓ Route optimization



Sample Collection

- ✓ SOP-based venipuncture
- ✓ Infection & quality protocols



Payment & Upselling

- ✓ Cash / Digital / Prepaid
- ✓ Relevant add-on test suggestion



Job Closure

- ✓ Digital completion
- ✓ CRM auto-update



Healthcare Logistics

- ✓ Timely receipt
- ✓ Preserved sample integrity

- ✓ API-Integrated CRM to Field Execution
- ✓ Pincode-Based Phlebotomist Mapping
- ✓ GPS & Status-Based Tracking
- ✓ Revenue Upselling Enablement
- ✓ Hub-Based Logistics Handover
- ✓ End-to-End Digital Traceability
- ✓ CB CREDENT CONNECT/CARE™

Inter-city Logistics Workflow

The Company operates a technology-enabled process for home-based sample collection, covering booking allocation, digital tracking, patient verification, sample collection and traceability, payment confirmation, and handover to designated aggregation points or logistics partners.

END-TO-END INTERCITY SAMPLE LOGISTICS WORKFLOW (Lead to Final Delivery)



Lead Received

- ✓ Pickup request received from partner lab
- ✓ Test type, quantity & priority captured
- ✓ Pickup location & timelines confirmed



Lab Coordination & Documentation

- ✓ Runner receives pickup instructions
- ✓ POD slip, manifests & compliance checks completed
- ✓ Samples packed as per transport SOPs



Intercity Pickup & Line-Haul Transport

- ✓ Samples received at nearest intercity hub
- ✓ Entry verification & condition check completed



Destination Hub Receipt

- ✓ Samples received at nearest intercity hub
- ✓ Entry verification & condition check
- ✓ Area-wise routing planned



Intercity Pickup & Line-Haul Transport

- ✓ Samples picked up by Credent runner
- ✓ Handover to Credent-owned intercity vehicle
- ✓ Temperature & transit integrity maintained



Intercity Pickup & Line-Haul Transport

- ✓ Samples picked up by Credent runner
- ✓ Pickup location & timelines confirmed

Intra-state Logistics Workflow

The Company operates a technology-enabled process for home-based sample collection, covering booking allocation, digital tracking, patient verification, sample collection and traceability, payment confirmation, and handover to designated aggregation points or logistics partners.

END-TO-END INTRASTATE LOGISTICS WORKFLOW (Sample Pickup & Delivery)



Runner Accepts Pickup Assignment

- ✓ Receives pickup center & timing on app
- ✓ Confirms details (location & schedule)
- ✓ Navigation guidance to collection center



Sample Collection from Center

- ✓ Visits collection center at designated time
- ✓ Retrieves samples according to instructions
- ✓ Documents pickup & ensures proper storage



Delivery to Lab or Connector Hub

- ✓ Transports samples in temperature-controlled box
- ✓ Delivers either to lab or Connector Hub
- ✓ Drop-off acknowledged & recorded in system

✓ SOP-driven sample handling • 📍 Fast, statewide sample transport

- ✓ SOP-driven sample handling
- ✓ Hub-and-spoke logistics support
- ✓ Fast, statewide sample transport
- ✓ End-to-end traceability



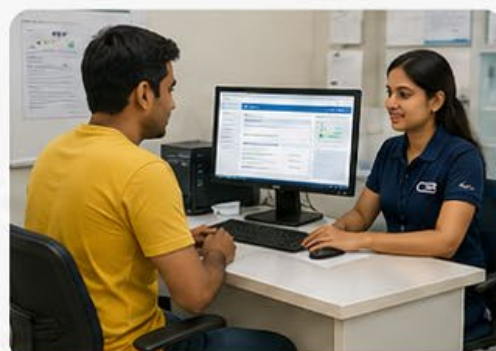
Logistics Operations

SITTING PHLEBOTOMIST WORKFLOW



Phlebo Receives Patients

- ✓ Greets and welcomes walk-in patients
- ✓ Confirms reason for visit & tests to be performed
- ✓ Directs patient to registration process



LIMS Registration In Room

- ✓ Patient details & tests entered into LIMS
- ✓ ID verification & data confirmation completed
- ✓ Booking receipt provided to patient



Sample Collection

- ✓ Phlebo performs sample collection
- ✓ Follows SOPs & hygiene protocols
- ✓ Collects blood or other samples as per test

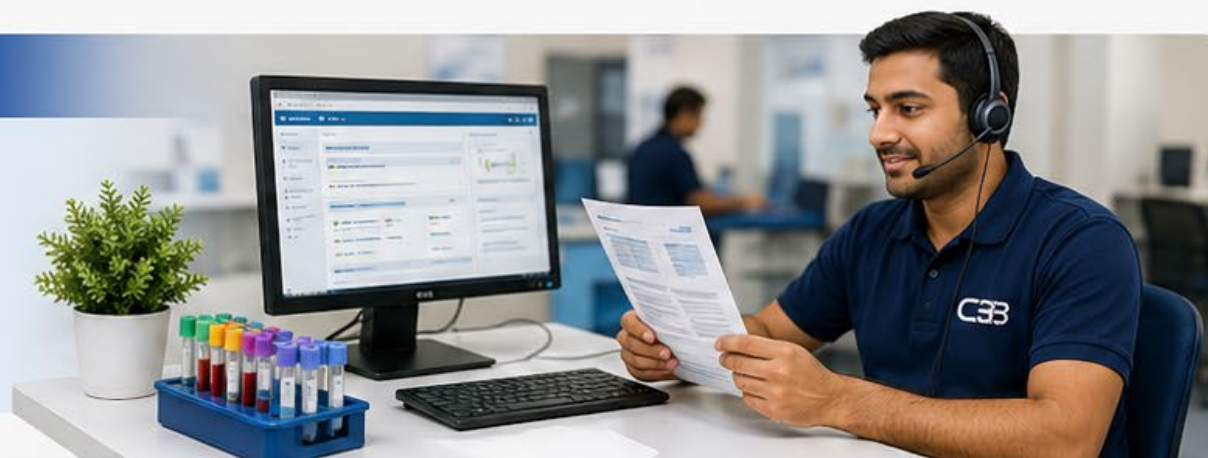


Report Dispatch

- ✓ Results processed & report generated as per TAT
- ✓ Report dispatched to patient or concerned doctor

✓ Calm & professional patient experience

- ✓ Accurate on-site registration in LIMS
- ✓ SOP-based sample collection procedures
- ✓ Timely, systematic & secure report delivery



Corporate Structure

Credent operates as a focused group: the listed parent owns the core sample-movement, cold-chain and warehousing backbone, and wholly-owned subsidiaries build specialised service lines on top of it.

Credent Connect N Care Ltd (C3)

Pre-analytics fulfilment partner – core sample movement, cold chain & warehousing backbone; logistics, SIS operations, marketing and IT service lines

Listed Parent

Credent Healthcare Pvt. Ltd. (CHPL)

On-ground delivery arm-end-to-end phlebotomy, doorstep home collection, clinical field operations, wellness camps

Wholly-owned active

Alltrak Technologies Pvt. Ltd. (ATPL)

Technology platform – home-collection and sample-movement software, sales & supply-chain visibility

Wholly-owned active

Credent Teams Pvt. Ltd. (CTPL)

Reserved for future activation; currently no operations, revenue or client engagements

Wholly-owned dormant

Note: All the above subsidiaries are wholly owned by Credent Connect N Care Limited.

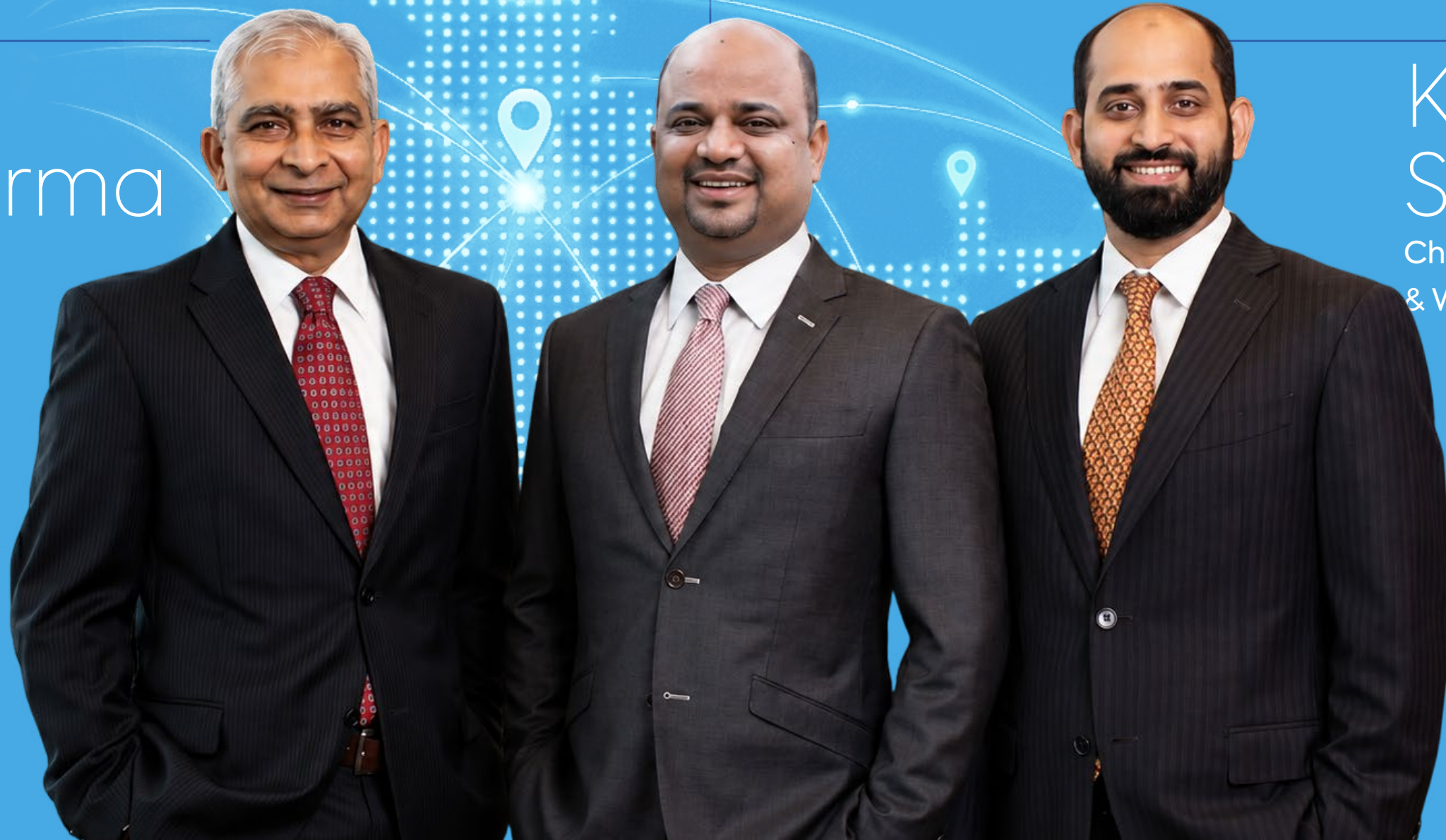


Leadership

Tarun Sharma
Chairman & Managing Director

Ashok
K. Sharma
Non-Executive
Director &
Promoter

Karan
Sharma
Chief Financial Officer
& Whole Time Director



The Values Behind The Mission

01

Integrity

Transparent operations, verified data and accountable governance form the foundation of every client, employee and investor relationship - now formalized through public-company disclosure standards.

02

Innovation

Alltrak's LIMS, IoT cold-chain sensors and real-time tracking continuously modernize a traditionally offline, paper-based industry, turning operational data into a competitive advantage.

03

Healthcare-first Approach

Every process is designed around sample integrity and patient outcomes first, and operational cost second - because a diagnostic error is never just a line-item.

04

Sustainable Growth

Asset-light, franchise- and platform-led expansion that compounds revenue without proportionate capital intensity, protecting margins as the company scales.

05

Global Mindset

A platform architecture designed from day one to extend beyond India - into South Asia, the Middle East and Africa - as diagnostic markets professionalize globally.

Geographical Reach



● Serviceable



Geography Wise Revenue Bifurcation

(Amount in Rs. Lakhs)

State wise revenue bifurcation	March 31, 2026		March 31, 2025		March 31, 2024	
	Amount	%	Amount	%	Amount	%
Maharashtra	6,296.35	29.40%	1,372.09	17.60%	2,078.93	27.45%
Uttar Pradesh	5,745.83	26.83%	1,191.24	15.28%	1,201.62	15.87%
Delhi	2,340.83	10.93%	1,756.72	22.54%	2,072.94	27.37%
Karnataka	2,258.69	10.55%	1,122.55	14.40%	499.82	6.60%
Haryana	2,071.03	9.67%	810.4	10.40%	671.04	8.86%
Telangana	682.42	3.19%	626.2	8.03%	625.4	8.26%
Rajasthan	691.19	3.23%	234.71	3.01%	10.51	0.14%
Gujarat	276.03	1.29%	30.42	0.39%	46.75	0.62%
West Bengal	222.12	1.04%	138.85	1.78%	47.56	0.63%
others	831.70	3.88%	511.08	6.54%	318.76	4.21%
Total	21,416.18	100%	7,794.26	100%	7,573.32	100%

*Others include Odisha, Jharkhand, Punjab, Assam, Uttarakhand, Jammu and Kashmir, Tripura, Chandigarh, Chhattisgarh, Goa, Kerala, Mizoram and Himachal Pradesh

Competitive Strengths

Comprehensive Healthcare Ecosystem & Logistics Platform

Focus on time-sensitive and compliance critical logistics through a cold chain enabled network, multimodal transportation and trained workforce, delivering end-to-end healthcare services.

Well established relationships with clients

The Company had around 280 domestic customers in Fiscal 2026, with repeat orders driven by quality of service, timely delivery of samples in optimal condition and healthy client relationships.

Leveraging the experience of our Promoters and Directors

The Company is led by Promoters with over 12 years and 9 years of experience in the logistics industry, supporting industry knowledge, client relationships, strategic planning, business development and understanding of market dynamics.



Business Strategies

Continue to invest in technological capabilities

The company is strengthening its healthcare logistics business by investing in technology (including acquiring Alltrak) to improve efficiency, scalability, tracking, and create new revenue opportunities.



Attract, develop and retain skilled employees

The company focuses on building a high-performing workforce by investing in hiring, development, retention, and fostering a strong, innovative work culture.

Deepen Client Engagement and Expand Services

The company aims to grow by expanding services, entering Tier 2 & 3 cities, and exploring M&A opportunities to increase client base, revenue streams, and market presence.



Enhancing Operating Effectiveness and Efficiency

The company aims to improve operational efficiency and reduce costs through continuous process improvements, corrective actions, & technology upgrades in healthcare logistics.

VISION 2030

Building an integrated, technology-enabled & temperature-controlled healthcare logistics and pre-analytics platform.



Full-Stack Ownership

Build an integrated pre-analytics platform across inbound logistics, consumables, warehousing, phlebotomy and outbound logistics



Temperature-Assured Everywhere

Expand temperature-controlled logistics across intra-city and inter-city networks, supported by IoT-enabled monitoring.



A Technology-Led Operating System

AllTrak's SaaS suite converging offline services into one digital nervous system to increase revenue contribution



Pan-India, Then Beyond

Deepen pan-India coverage and evaluate international expansion opportunities



Category Leadership

Build a differentiated integrated diagnostics supply-chain platform.



Revenue Aspiration

Management aspiration: ~45% revenue CAGR through FY30



Mission 2026 – 2030 : The Roadmap



FY26

Listed & Foundation

Successful NSE Emerge listing; scale the core pre analytics and logistics platform



FY27

Sector Focus Sprint

Concentrate on Vaccine, Pharma, Diagnostics, Clinical Trials, Cord Blood & IVD;



FY28

Platform Consolidation

Integrate all verticals into a unified platform; healthcare warehouse fully operational.



FY29

Sector Leadership & Scale

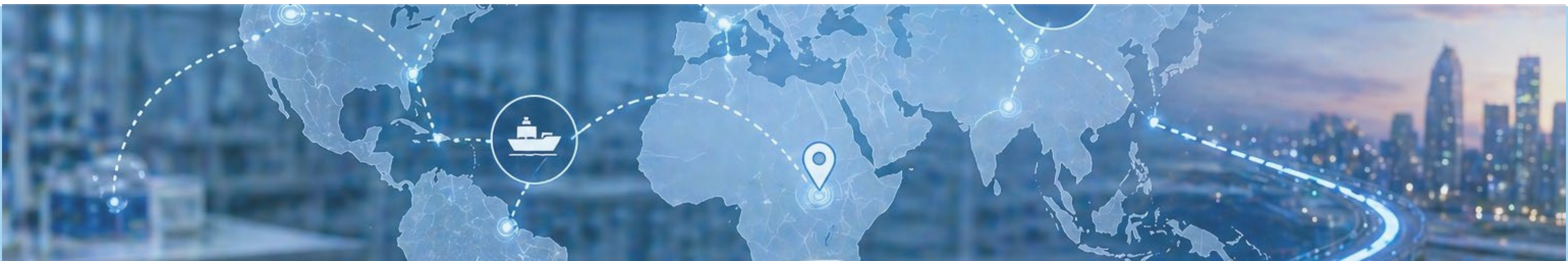
Category leadership across the six focus sectors, built on depth rather than breadth.



FY30

International Expansion

Evaluate expansion into selected international markets, subject to regulatory and commercial feasibility.



Six Focus Sectors Building Credent 2.0

Vaccines

Cold-chain-critical distribution for national immunization programs and private vaccination networks



Pharma

Time- and temperature-sensitive distribution for pharma manufacturers and distributors moving product to hospitals and pharmacies.



Diagnostics

The core pre-analytics logistics business – organized lab chains and standalone labs, sample collection to laboratory delivery



Clinical Trials (CRO)

Time-critical sample logistics for trial sponsors and Contract Research Organisations – a fast-growing, high-compliance segment.



Cord Blood

Ultra-critical, one-time collection and cryo-transport – requiring specialised cryogenic and time-sensitive transport.



IVD Companies

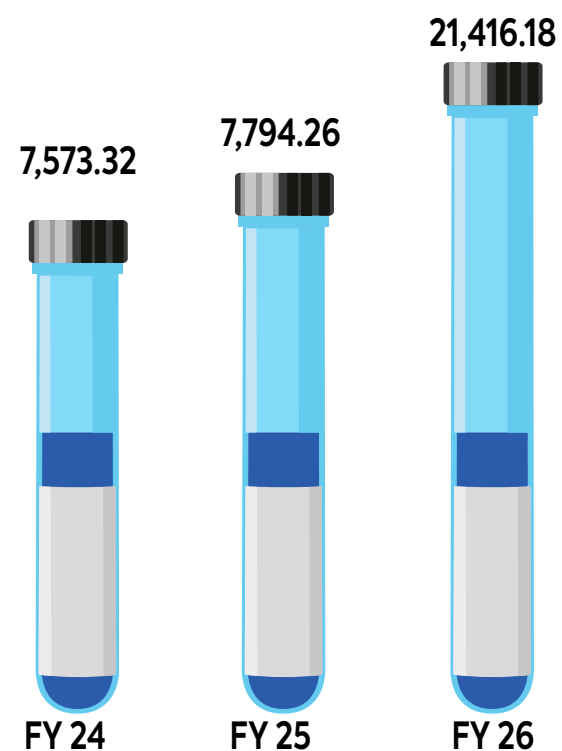
Reagent import handling, cold storage and last-mile delivery to laboratories on behalf of in-vitro diagnostics manufacturers.



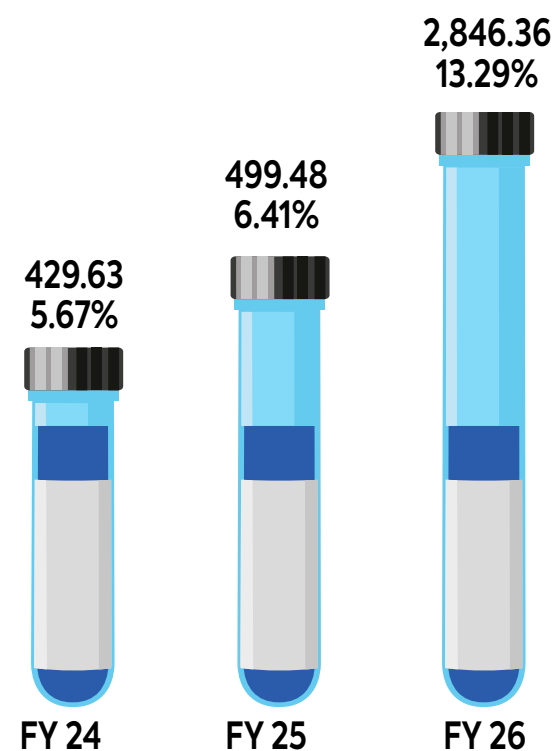
Key Performance Indicators

(₹ in lakhs except percentage and ratios)

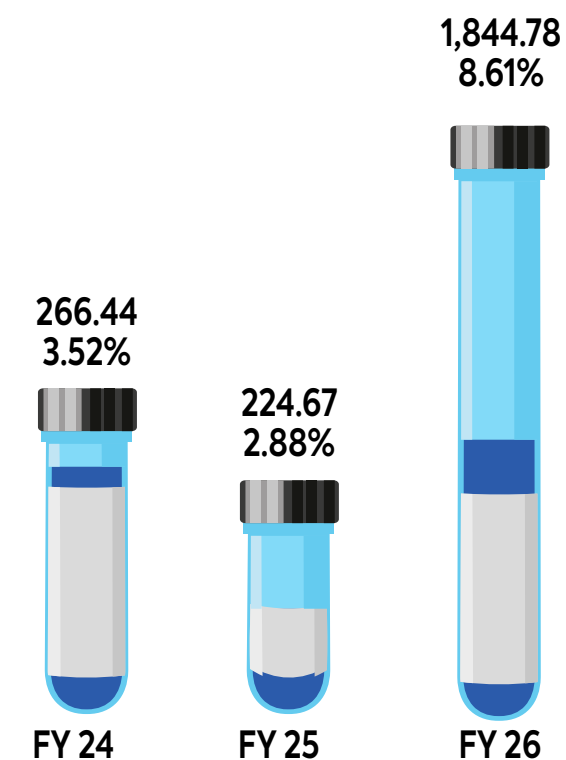
REVENUE FROM OPERATIONS



EBITDA & EBITDA MARGIN

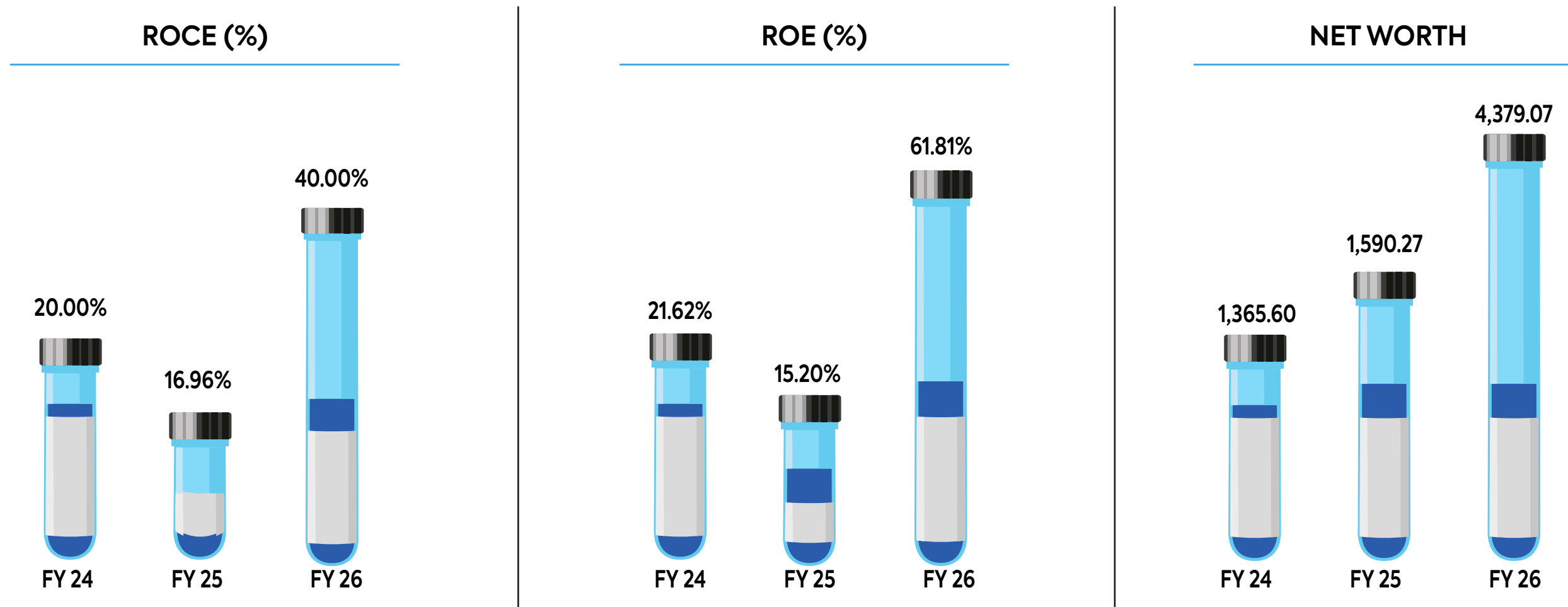


PAT & PAT MARGIN



Key Performance Indicators

(₹ in lakhs except percentage and ratios)





Statement of Assets & Liabilities

(Amount in Rs. Lakhs)

PARTICULARS	As At		
	31/03/26 Consolidated	31/03/25 Standalone	31/03/24 Standalone
A) EQUITY AND LIABILITIES			
Shareholders' Funds			
Share Capital	1,325.49	20	20
Reserves & Surplus	3,053.58	1,570.27	1,345.60
	4,379.07	1,590.27	1,365.60
Non Current Liabilities			
Long Term Borrowings	519.8	37.55	145.73
Deferred Tax Liabilities (Net)	-	-	-
Other Long Term Liabilities	-	-	-
Long Term Provisions	194.88	89.45	68.12
	714.68	127	213.85
Current Liabilities			
Short Term Borrowings	1,674.95	704.38	538.83
Trade Payables			
(i) total outstanding dues of micro enterprises and small enterprises; and	5.02	10.43	8.53
(ii) total outstanding dues of creditors other than micro enterprises and small enterprises	93.48	38.61	46.91
Other Current Liabilities	1,187.58	470.42	453.62
Short Term Provisions	102.04	8.4	13.8
	3,063.07	1,232.24	1,061.69
Total	8,156.82	2,949.51	2,641.15

PARTICULARS	As At		
	31/03/26 Consolidated	31/03/25 Standalone	31/03/24 Standalone
B) ASSETS			
1 Non-Current Assets			
(Property, Plant & Equipment & Intangible Assets)			
Property, Plant & Equipment	730.17	620.15	164.3
Intangible Assets	204.1	5.88	2.21
Capital Work- in- progress	158.91		
Intangible Assets under development	129.29	88.82	-
Goodwill on Consolidation	234.62		
	1,457.08	714.86	166.51
Non-Current Investment	-	-	-
Deferred Tax Assets (Net)	168.52	27.14	17.06
Long Term Loans and Advances	-	261.84	238.44
Other Non Current Assets	226.11	10.1	5.38
	394.61	299.08	260.88
Current Assets			
Current Investments	-	-	-
Inventories	-	-	-
Trade Receivables	5,882.73	1,790.55	1,901.68
Cash and Bank Balances	221.02	116.47	289.59
Short-Term Loans and Advances	172.53	28.56	22.5
Other Current Assets	28.85	-	-
	6,305.13	1,935.58	2,213.76
Total	8,156.82	2,949.51	2,641.15

Profit & Loss Statement

(Amount in Rs. Lakhs)

PARTICULARS	For the year ended		
	31/03/26 Consolidated	31/03/25 Standalone	31/03/24 Standalone
Revenue From Operation	21,416.18	7,794.26	7,573.32
Other Income	26.55	29.22	28.37
Total Income	21442.73	7,823.49	7,601.69
Expenditure			
Cost of Material & Services Consumed	7,318.47	2,770.79	2,122.89
Changes in inventories of Stock in trade	-	-	-
Employee Benefit Expenses	8460.82	2,717.19	3,578.45
Finance Cost	138.15	94.77	52.75
Depreciation and Amortisation Expenses	310.55	137.78	51.29
Other Expenses	2755.46	1,802.26	1,437.22
Total Expenditure	18983.44	7,522.78	7,242.61
Profit/(Loss) Before Exceptional & extraordinary items & Tax	2459.29	300.71	359.08
Profit/(Loss) Before Tax	2459.29	300.71	359.08
Tax Expense:			
Tax Expense for Current Year	637.02	86.13	99.05
Short/(Excess) Provision of Earlier Year	-	-	-
Deferred Tax	-22.51	-10.08	-6.4
Net Current Tax Expenses	614.51	76.04	92.65
Profit/(Loss) after tax for the Year	1844.78	224.67	266.44
Earnings per equity shares (Face Value of Rs. 10 each)			
Basic/Diluted (In Rs.) before extra ordinary items	13.95	2.2	2.61
Basic /Diluted (In Rs.) after extra ordinary items	13.95	2.2	2.61





Cash Flow Statement

PARTICULARS	For the Period/Year ended on		
	31/03/26 Consolidated	31/03/25 Standalone	31/03/24 Standalone
A) Cash Flow From Operating Activities :			
Net Profit before tax and before extraordinary items	2,459.29	300.71	359.08
Adjustment for :			
Depreciation	310.55	137.78	51.29
Finance Cost	138.15	94.77	52.75
Bad Debts Written off	1.25	41.68	-
Investment written off	-	4.43	-
Provision of CSR	-	-	-
Provision of Gratuity	45.57	22.43	16.92
Rent Income	-	-	(0.64)
Interest Income	(24.78)	(26.63)	(26.30)
Operating profit before working capital changes	2,930.02	575.15	453.10
Changes in Working Capital			
(Increase)/Decrease in Trade Receivables	(2,835.61)	69.46	(407.40)
(Increase)/Decrease in Short Term Loans & Advances	(6.65)	(10.49)	(3.62)
Increase/(Decrease) in Trade Payables	(342.13)	(6.40)	49.42
Increase/(Decrease) in Other Current Liabilities	178.45	17.73	141.46
Increase/(Decrease) in Other Current Assets	(17.12)	-	-
Increase/(Decrease) in Security Deposits	(2.93)	(4.72)	(2.09)
Cash generated from operations	(95.97)	640.73	230.87
Less:- Income Taxes paid (net of Refund)	(566.36)	(92.63)	(149.94)
Net cash flow from operating activities	(662.34)	548.10	80.93

PARTICULARS	For the Period/Year ended on		
	31/03/26 Consolidated	31/03/25 Standalone	31/03/24 Standalone
B) Cash Flow From Investing Activities :			
Purchase of Fixed Assets including of CWIP	(551.35)	(686.13)	1.06
Rent Income	-	-	0.64
Increase/(Decrease) in Loans and Advances	733.11	(23.40)	(72.29)
Increase/(Decrease) in Fixed Deposits	(200.69)	63.70	(68.86)
Investment in FD/Redeem			
Acquisition of subsidiary net of cash and cash equivalent	(1,084.01)	-	-
Interest Income	24.78	26.63	26.30
Net cash flow from Investing activities	(1,078.16)	(619.20)	(113.15)
C) Cash Flow From Financing Activities :			
Proceeds from issue of share capital			
Proceeds in Short Term Borrowings	1,797.98	165.55	190.08
Proceeds in Long Term Borrowings	196.57	-	77.68
Repayment in Long Term Borrowings	-	(108.18)	-
Finance Cost (Including adjustment of Interest accrued but not due on borrowings)	(128.24)	(95.70)	(51.27)
Net cash flow from financing activities	1,865.52	(38.33)	216.49
Net Increase/(Decrease) In Cash & Cash Equivalents	125.02	(109.42)	184.25
Cash and Cash equivalents at the beginning of the year	96.00	205.42	21.16
Cash and Cash equivalents at the end of the year	221.02	96.00	205.42

A Highly Coordinated Logistics Ecosystem for Reliable Test Outcomes

Logistics plays a critical role in ensuring reliability, speed and regulatory compliance across the medical diagnostics value chain.

Unlike general logistics, diagnostic logistics must operate within strict time-temperature windows, follow biosafety norms, and maintain sample integrity to ensure reliable test outcomes.

End-to-End Solutions

Digital Tracking | Route Optimization

01 | Specimen Collection & Courier Services

Blood, urine, swabs, biopsies and other patient specimens are collected, handled and transported within defined time-temperature windows.

Scheduled and on-demand pickups | Home-collection models | Direct-to-customer services | Secure transport

02 | Last-Mile Delivery

Timely delivery of specimens, test kits, reagents and medical consumables.

Specialized vehicles | Cluster-based routing | Digital tracking systems | Temperature integrity

03 | Cold-Chain Logistics

Temperature-sensitive specimens, reagents, culture media, molecular testing panels and blood derivatives.

Refrigerated vehicles | Frozen transport systems | Cryogenic solutions | Validated packaging | Continuous temperature surveillance

04 | Lab Kit Assembly & Distribution

Procurement, kitting, packaging and scheduled replenishment of vacutainers, swabs, reagents, cartridges, PPE and molecular testing materials.

05 | Warehousing & Inventory Management

Temperature-regulated warehouses with ambient, chilled and frozen zones.

Integrated inventory systems | Automated monitoring tools | Forecasting algorithms



Quality Assurance Systems | Faster Turnaround Times (TAT) | Minimizing Pre-Analytical Errors | Nationwide Coverage, including Tier II/III cities

Chain-of-custody protocols | IATA packaging standards – Category B infectious substances, UN3373 | Tamper-proof packaging | Barcode-based labelling | Real-time tracking

Rapid and Sustained Growth Driving Demand for Specialized Logistics Solutions

Key factors driving the demand for logistics solutions in the medical diagnostics industry in India

India's diagnostic testing sector has seen rapid and sustained growth, driven by rising awareness of preventive healthcare, increasing incidence of chronic diseases, and expanding insurance coverage.

Overall Growth in Diagnostic Testing

Increasing volume of diagnostics testing. Higher sample loads require efficient, reliable and scalable logistics networks while maintaining strict turnaround times.

Regulatory Compliance

Stringent regulations & quality standards: strict quality control, temperature compliance and chain-of-custody documentation. Accreditation requirements such as NABL.

Explosive Growth in Home-Based Testing

Rising consumer preference for convenience, digital health adoption and increased awareness of preventive care. Frequent pickups, broader route coverage and reliable cold-chain handling.

Increasing Demand for Preventive Diagnostic Services

Full-body check-ups, wellness panels, early screening programs and lifestyle disease monitoring. Larger fleets, more frequent pickups, faster last-mile transport, expanded kit distribution cycles, reagent replenishment and cold-chain capacity requirements.

Growth in Clinical Trials and Advanced Diagnostics

Clinical trials, genomic testing, precision medicine and specialized molecular diagnostics. Ultra-low temperature transport, strict time-bound movement and highly controlled environments.

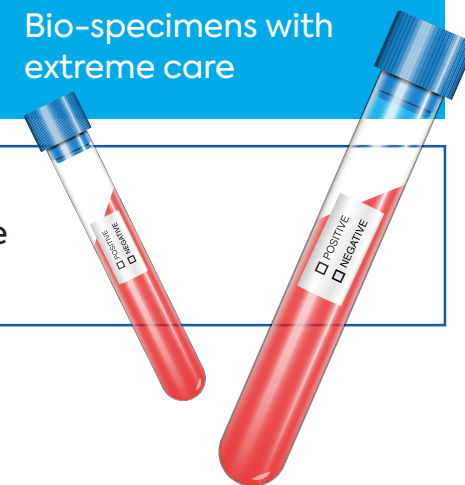
High-Quality Cold-Chain Infrastructure

Validated packaging
Continuous temperature monitoring
Standardized documentation
Bio-specimens with extreme care

Specialized logistics partners have emerged offering end-to-end solutions integrated with digital tracking, route optimization, and quality assurance systems.

These logistics services are critical for supporting faster turnaround times (TAT), minimizing pre-analytical errors, and enabling nationwide coverage, including Tier II/III cities.

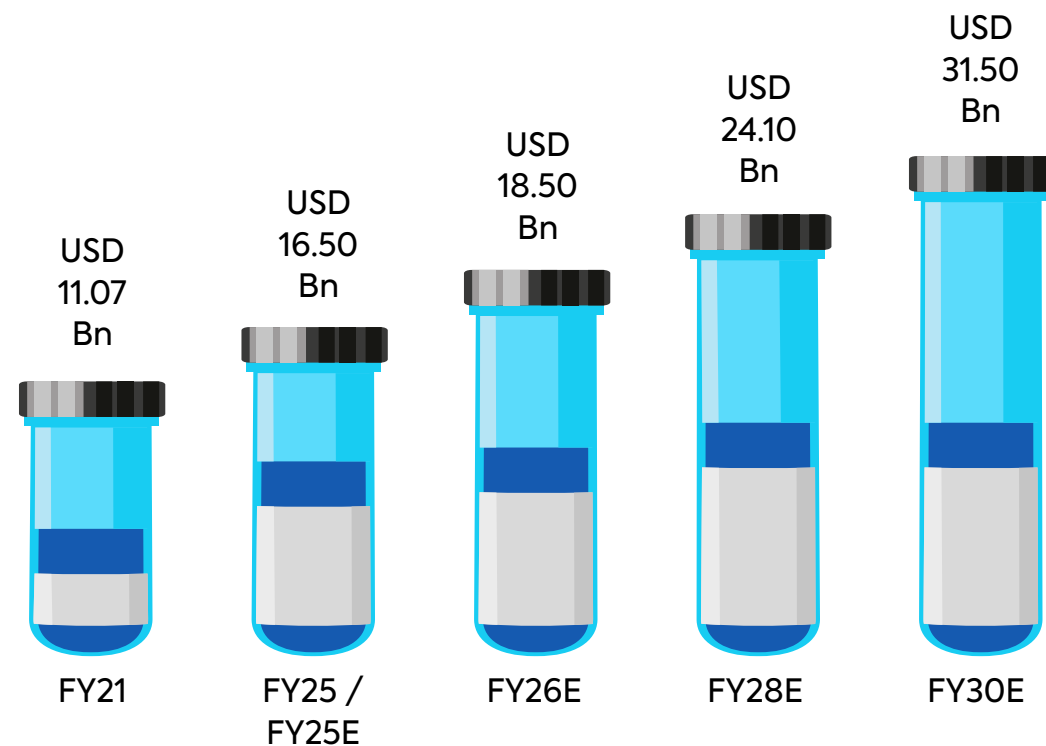
Operational necessities: enhance last-mile capabilities and strengthen coordination between phlebotomists, couriers, and laboratories.



Strong Structural Growth Across India's Modern Diagnostic Infrastructure

The Indian diagnostic laboratory industry has become a critical enabler of the country's healthcare system, supporting early disease identification, treatment planning, and preventive health management.

Clear and Sustained Upward Growth Trend



10.5% CAGR
FY21–FY25

Near doubling of market size within five years
USD 16.50 Bn FY25E → USD 31.50 Bn FY30E

Robust, Technology-Enabled Infrastructure

Wide-Reaching Networks

Central reference laboratories | Satellite labs | Extensive collection centre footprints | High-volume testing | Standardized processes | Efficient sample logistics across geographies

Advanced Diagnostic Platforms

Molecular diagnostics | Immunodiagnostics | Microbiology automation | Genomics | Complex and high-value tests | Routine pathology and biochemistry workloads

Beyond Metros

Accessibility and reliability in diagnostics beyond metros. Deeper penetration into Tier-2 and Tier-3 markets through franchise-led collection centres and mobile phlebotomy services.

Technology-Enabled Networks

Laboratory Information Systems (LIS) | Automation technologies | Digital interfaces for booking, tracking and delivering reports | NABL-accredited facilities

Scalable and tech-enabled networks position organized diagnostic providers as the backbone of India's modern diagnostic infrastructure, with continued expansion expected across urban and semi-urban markets.



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