alletec

Building to scale in the AI era

Q2 & H1FY'27 Investor Presentation

Quarter & Half year ended 30 September 2026

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01

The Story of H1

The story of H1: growth, reach and operating discipline

Momentum is building; the next milestone: translating momentum into stronger earnings.

01

+14.6%

Accelerated Growth

Q2 revenue grew 20.2% YoY, ahead of H1 growth growth of 14.6%.

02

58%

Business from international customers customers

58% of H1 operating revenue came from markets outside India. Very important win of a sizable Kenyan Retail customer in Q2.

03

2 + 4

The solution portfolio is evolving

ARC 365 has two paying customers, with four more active discussions.

MANAGEMENT PRIORITY

Accelerate higher-value services growth and rebuild operating margin.

Revenue Growth Accelerates in Q2 FY'27

Q2 FY'27

	Product	Services
Domestic Business	INR 118.3 Mn +13.5% QoQ ▲ +20.8% YoY ▲	INR 51.4 Mn +1.2% QoQ ▲ +0.3% YoY ▲
International Business	INR 76.8 Mn +15.8% QoQ ▲ +95.3% YoY ▲	INR 154.5 Mn +2.7% QoQ ▲ +6.5% YoY ▲
Revenue Mix	49% Product	51% Services

Revenue Growth Accelerates in H1FY'27

H1 FY'27

	Product		Services	
Domestic Business	INR 222.6 Mn	+11.1% YoY ▲	INR 102.2 Mn	+4.2% YoY ▲
International Business	INR 143.1 Mn	+67.1% YoY ▲	INR 305.0 Mn	+5.1% YoY ▲
Revenue Mix	47% Licenses		53% Services	

Company In Numbers – Q2FY'27

Total Revenue*
INR 401.0 Mn
▲ +7.8% QoQ
▲ +20.2% YoY

Total Income from Operations#
INR 425.6 Mn
▲ +7.7% QoQ
▲ +14.6% YoY

EBITDA$
INR 80.1 Mn
▲ +14.7% QoQ

EBITDA Margin$
18.8%
▲ +115 bps QoQ

Net Profit
INR 55.4 Mn
▲ +9.4% QoQ

Net Profit Margin
13.0%
▲ +21 bps QoQ

Total Product Revenue
INR 195.1 Mn
▲ +14.4% QoQ
▲ +42.1% YoY

Total Services Revenue
INR 205.9 Mn
▲ +2.3% QoQ
▲ +4.9% YoY

Repeat + Recurring Revenue
92.2%

Customers Added
2 Domestic
3 International

*Total Revenue (Exclusive of Other Income) #Total Income from Operations (Inclusive of Other Income) $EBITDA (Inclusive of Other Income)

Company In Numbers – H1FY'27

Total Revenue*
INR 772.8 Mn
▲ +14.6% YoY

Total Income from Operations#
INR 820.7 Mn
▲ +11.7% YoY

EBITDA$
INR 149.8 Mn

EBITDA Margin$
18.3%

Net Profit
INR 106.0 Mn

Net Profit Margin
12.9%

Total Product Revenue
INR 365.6 Mn
▲ 27.9% YoY

Total Services Revenue
INR 407.2 Mn
▲ 4.9% YoY

Repeat + Recurring Revenue
91.3%

Customers Added
5 Domestic
8 International

*Total Revenue (Exclusive of Other Income) #Total Income from Operations (Inclusive of Other Income) $EBITDA (Inclusive of Other Income)

CUSTOMER-REGION VIEW FROM THE SALES LEDGER; ₹ MILLIONS.

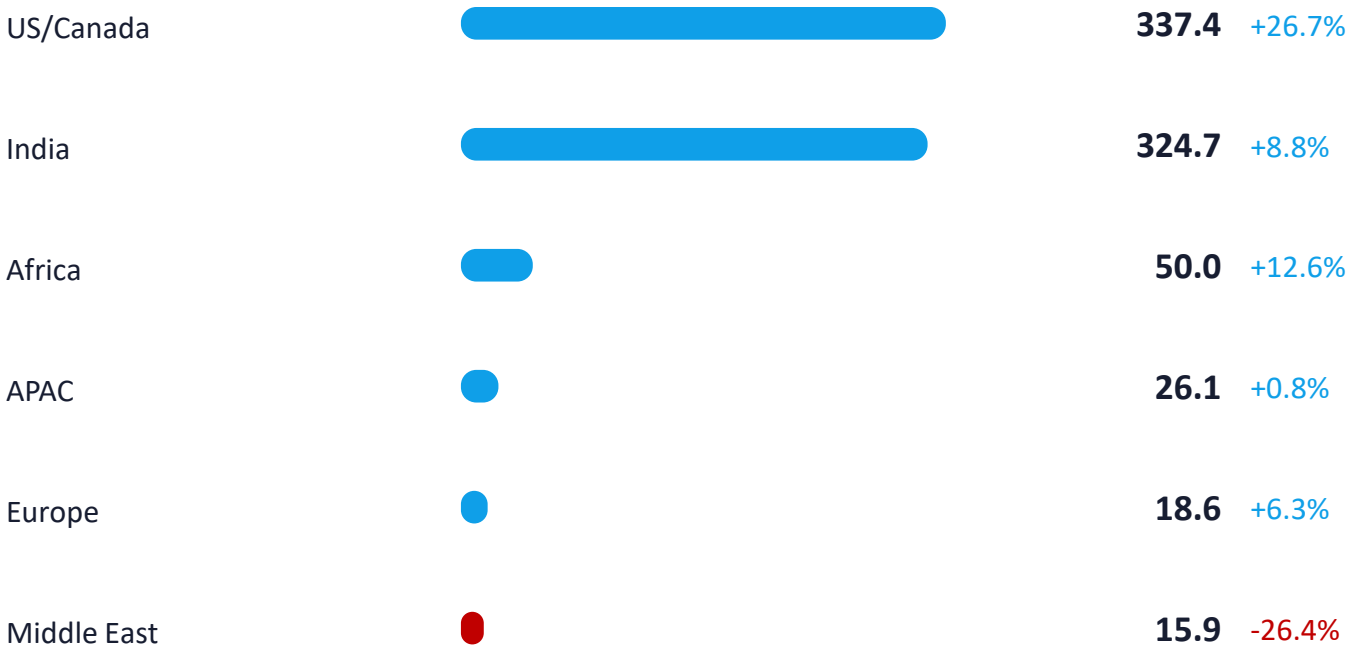
International customers contribute most of revenue

58.0%

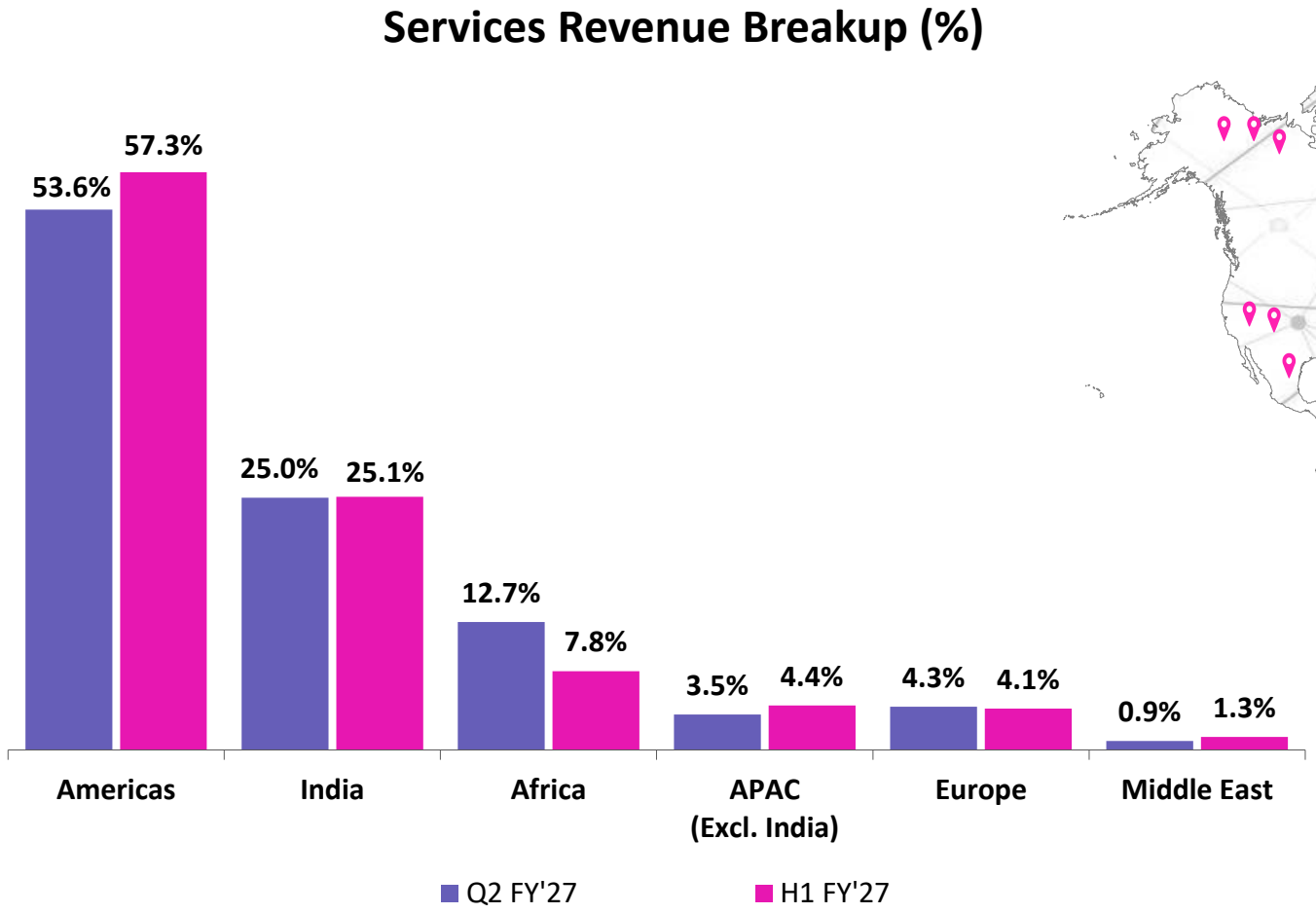
H1 revenue from outside India

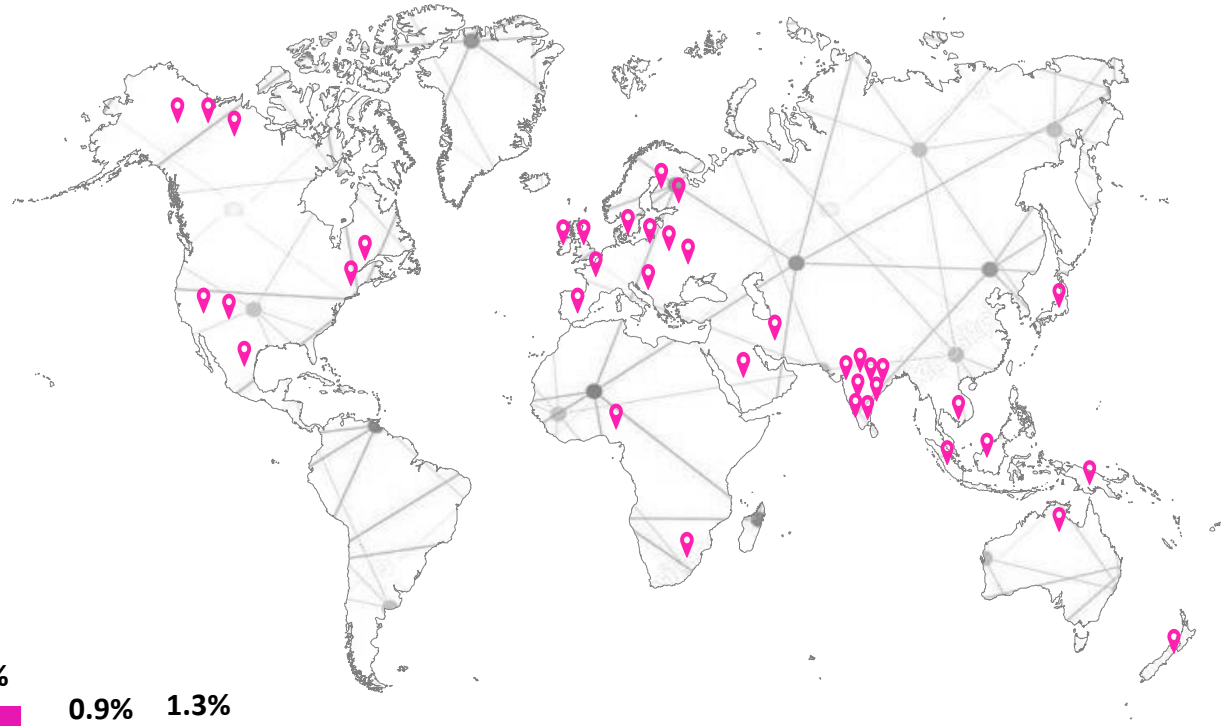
₹448.0 Mn

+19.2% year-on-year



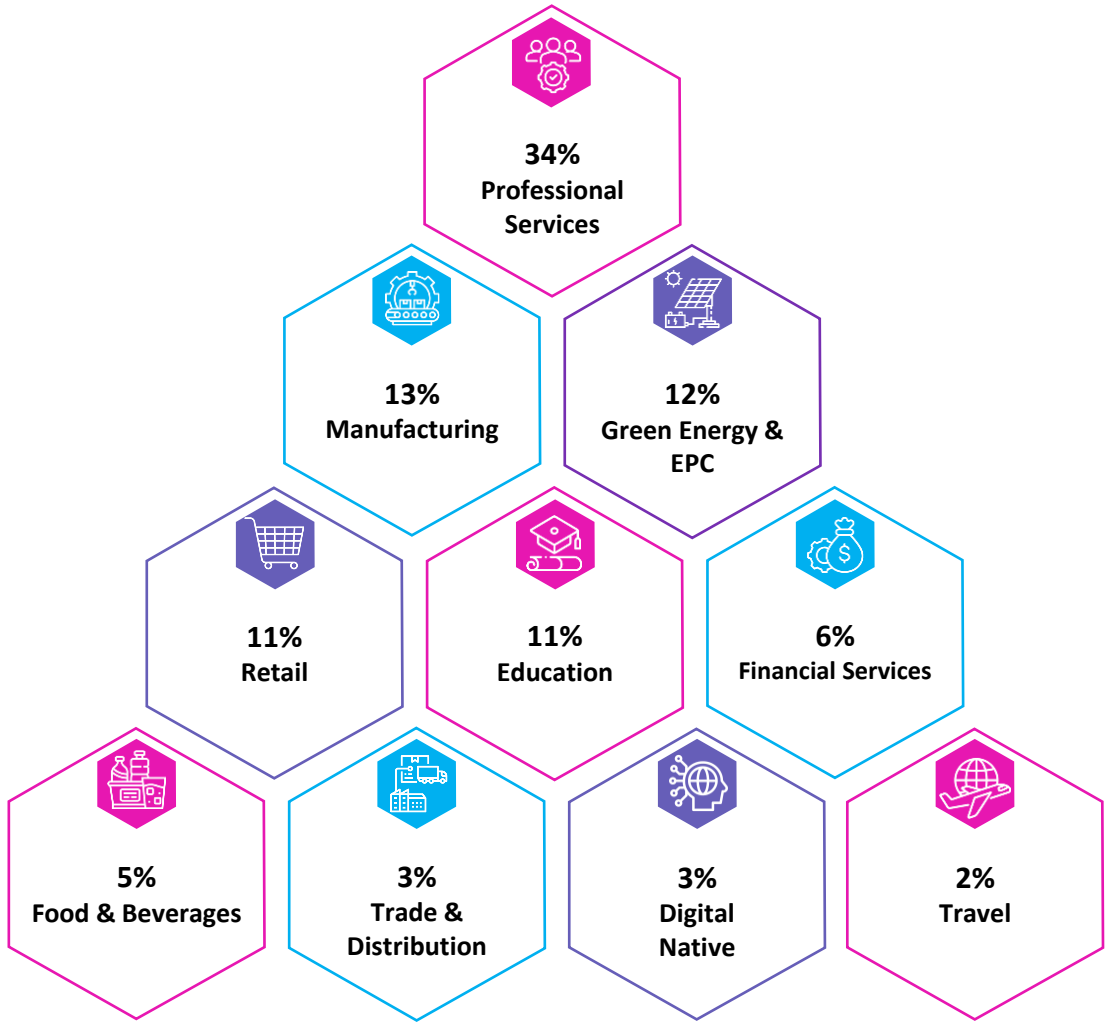
Geographic Spread

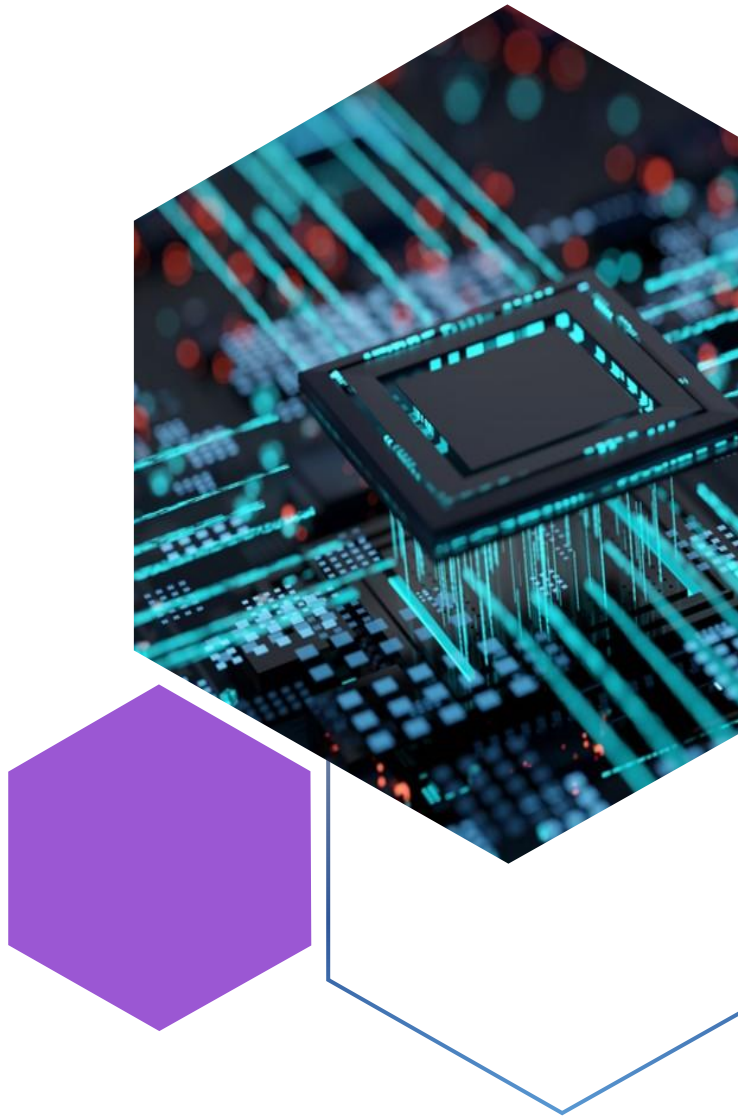




Industries Served – H1 FY'27

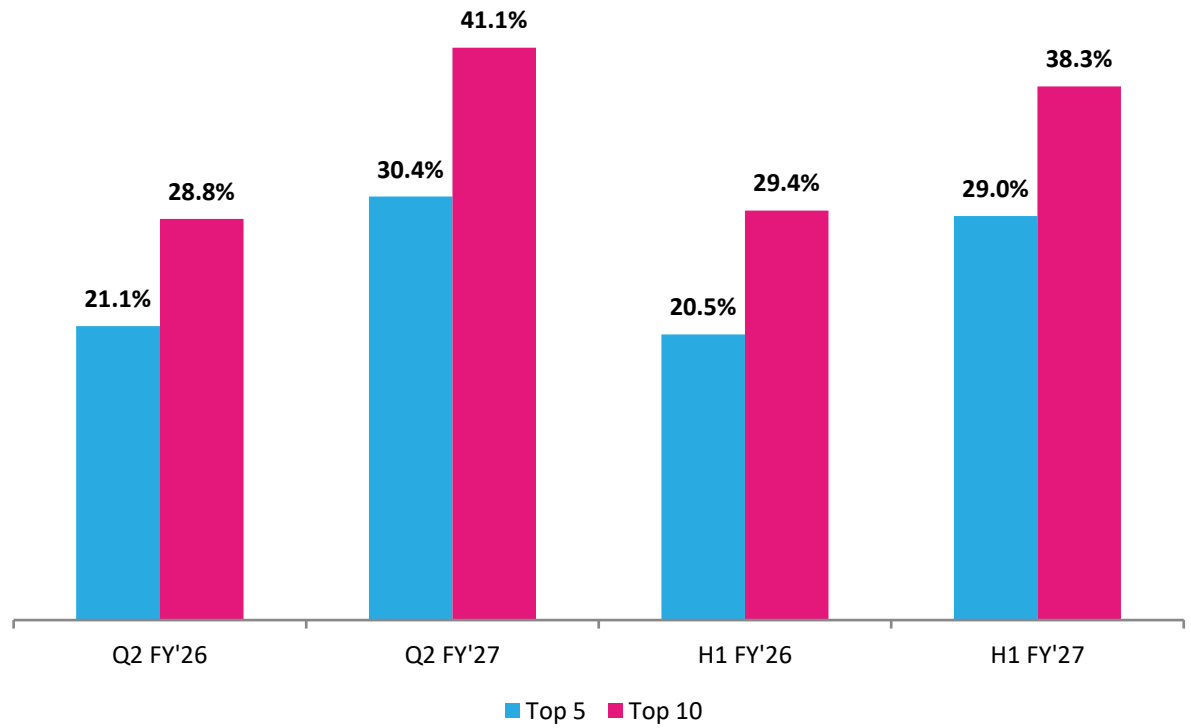






Journey Towards Deeper Customer Engagements

Revenue Concentration Trend (%)



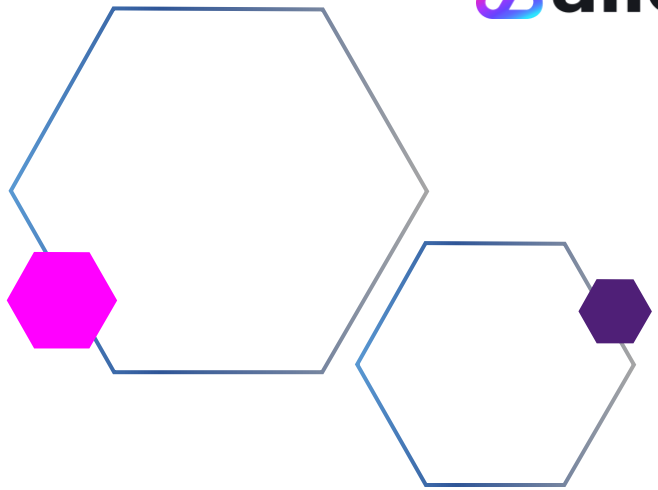
H1 FY'27 Top 5 Anchor Accounts (₹ Mn)

Customer 1	74.09
Customer 2	56.70
Customer 3	47.27
Customer 4	24.13
Customer 5	21.58

02

Decision Intelligence Workspace

From concept introduction to first paying customers



02

Paying Customers

Signed up for ARC 365
one in India and one in Kenya.

04

Active Conversations

Potential new customers

Early commercial validation — not yet a claim of material revenue or a forecast of conversion.

An Industry Decision Intelligence layer

Turning trusted operational data into reusable industry context, recommendations and guided action.

Enterprise systems
D365 • ERP • CRM • vertical systems

→

Governed data
Fabric • semantic models • business rules

→

ARC 365
Industry decision logic & intelligence

→

Decisions & actions
Signals • recommendations • guided action

KNOW › UNDERSTAND › DECIDE › ACT › LEARN

Strategic direction: from Microsoft solutions partner to an Industry Decision Intelligence Company.

H2 focus: improve the quality & scalability of growth

Four management priorities directly linked to the H1 performance.

01

Convert platform engagement into services

Capture higher-value implementation, integration, Data & AI and managed services demand.

SERVICES GROWTH

02

Recover delivery operating leverage

Strengthen utilization, project realization, subcontractor discipline and execution.

MARGIN

03

Scale productive international presence

Prioritize profitable regional opportunities and repeatable delivery economics.

GLOBAL EXECUTION

04

Productize ARC 365 customer success

Make early deployments referenceable and progress active conversations without overclaiming.

AI ADOPTION

03

What's Steady

Driving end-to-end transformations through six core pillars

SYSTEM INTEGRATION
Integrate disparate systems and emerging technologies to build a resilient IT architecture with seamless, secure data flow across the enterprise

MODERN DATA PLATFORMS & DATA GOVERNANCE
Harness a unified data platform for advanced analytics and BI, with trusted, secure, governed data for an AI-ready enterprise.

ENTERPRISE APPLICATIONS
Implement, modernize, and optimize ERP, CRM, HCM, Commerce, Project Operations, and Contact Center applications tailored to business needs

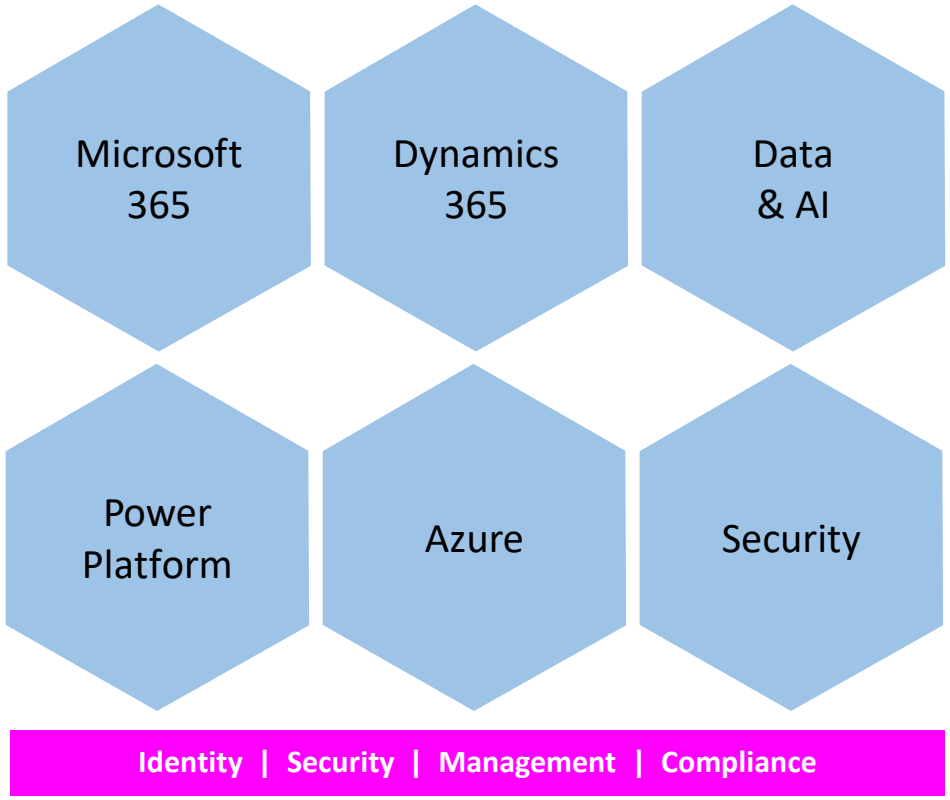
AI & AGENTIC TRANSFORMATION
Design and responsibly deploy AI. Copilots and AI agents automate workflows, augment decisions, and deliver business outcomes

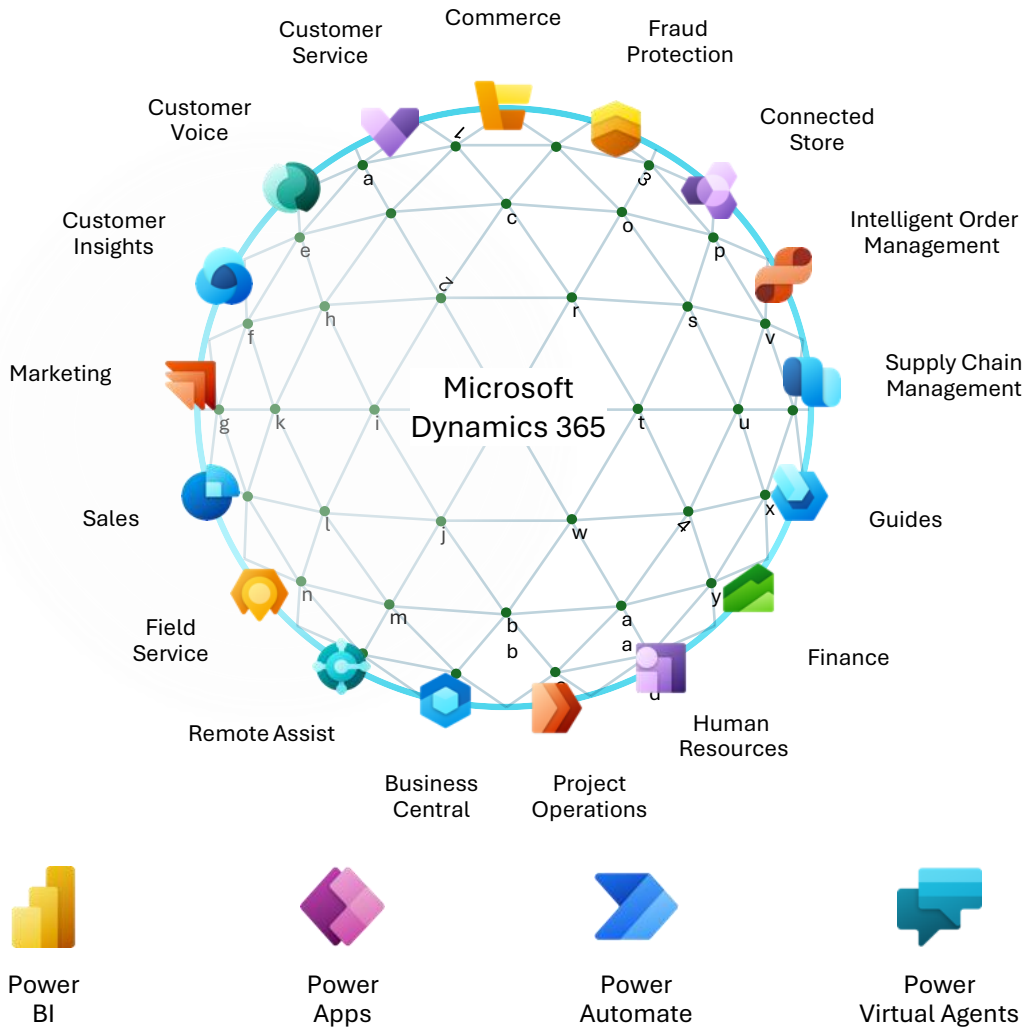


DIGITAL CORE MODERNIZATION
Modernize the digital core with cloud, application modernization, automation, and modern workplace solutions

CLOUD INFRA, SECURITY & MANAGED SERVICES
On-demand compute, platforms, and applications, secured against cyber threats and managed end-to-end by Alletec

Leveraging Full Stack





Board of Directors



Dr. Ajay Mian
Managing Director



Mr. Rajiv Tyagi
Executive Director



Mrs. Ritu Sood
Executive Director



Mr. Vinod Sood
Independent Director



Mr. Sunil Goyal
Independent Director



Mr. Rahul Gupta
Independent Director



Dr. Suman Mian
Non Executive Director

Lead Management



Mr. Rajiv Tyagi
Executive Director



Mr. Sandeep Jain
Chief Financial Officer



Dr. Ajay Mian
Managing Director



Mrs. Ritu Sood
Executive Director



Mr. Sandeep Salman
Head - Cloud & Managed Services

04

Annexures

(Consolidated)

Quarterly Income Statement

Particulars (INR Mn)	Q2 FY'27	Q1 FY'27	Q2 FY'26	YoY%	QoQ%	H1FY'27	H1FY'26
Total Revenue	**401.0**	**371.8**	**333.5**	**20.2%**	**7.8%**	**772.8**	**674.2**
Other Income	24.6	23.3	37.7	-34.8%	5.7%	47.9	60.3
Total Income from Operations	**425.6**	**395.1**	**371.3**	**14.6%**	**7.7%**	**820.7**	**734.5**
Total Expenditure	345.5	325.3	266.6	29.6%	6.2%	670.8	541.9
EBITDA	**80.1**	**69.8**	**104.7**	**-23.5%**	**14.7%**	**149.8**	**192.6**
EBITDA Margin (%)	***18.8%***	***17.7%***	***28.2%***	***-939 bps***	***+115 bps***	***18.3%***	***26.2%***
Depreciation	3.5	3.3	3.2	9.9%	7.0%	6.9	6.2
Profit Before Interest & Tax	**76.5**	**66.5**	**101.5**	**-24.6%**	**15.1%**	**143.0**	**186.4**
Interest	0.1	0.1	0.1	-16.5%	-7.8%	0.2	0.3
Profit Before Tax	**76.4**	**66.4**	**101.3**	**-24.6%**	**15.2%**	**142.8**	**186.2**
Minority Share Adjusted	0.0	-0.0	-0.0	-	-	-	-0.0
Tax	-21.0	-15.7	-27.6	23.7%	-33.6%	-36.8	-49.2
Net Profit	**55.4**	**50.6**	**73.8**	**-24.9%**	**9.4%**	**106.0**	**136.9**
Net Profit Margin (%)	***13.0%***	***12.8%***	***19.9%***	***-686 bps***	***+21 bps***	***12.9%***	***18.6%***
EPS (in Rs.)	**2.74**	**2.51**	**3.65**	**-24.9%**	**9.4%**	**5.25**	**6.78**

(Consolidated)

Annual Income Statement

Particulars (INR Mn)	FY'21	FY'22	FY'23	FY'24	FY'25	FY'26
Total Revenue	**612.2**	**700.5**	**876.8**	**1,163.3**	**1,399.7**	**1,378.7**
Other Income	20.6	22.9	38.1	73.2	95.0	117.2
Total Income from Operations	**632.8**	**723.4**	**915.0**	**1,236.5**	**1,494.7**	**1,495.9**
Total Expenditure	508.8	592.5	755.4	964.5	1,093.2	1,132.7
EBITDA	**124.0**	**130.9**	**159.6**	**272.1**	**401.5**	**363.2**
EBITDA Margin (%)	***19.6%***	***18.1%***	***17.4%***	***22.0%***	***26.9%***	***24.3%***
Depreciation	4.6	6.4	6.8	10.0	11.4	13.8
Profit Before Interest & Tax	**119.4**	**124.6**	**152.8**	**262.1**	**390.0**	**349.4**
Interest	0.1	0.1	0.1	-	0.2	0.5
Profit Before Tax	**119.3**	**124.5**	**152.7**	**262.1**	**389.9**	**348.9**
Minority Share Adjusted	-10.6	3.7	-0.1	0.5	-0.1	-0.0
Tax	22.0	32.3	36.9	64.7	-96.7	-77.9
Adjusted Net Profit (excl. extra ord.)	**86.6**	**95.9**	**115.9**	**196.9**	**293.1**	**271.0**
Net Profit Margin (%) (excl. extra ord.)	***13.7%***	***13.3%***	***12.7%***	***15.9%***	***19.6%***	***18.1%***
Extraordinary Items	-	6.8	4.9	-	8.4	-13.8
Net Profit (incl. extra ord.)	**86.6**	**102.7**	**120.8**	**196.9**	**301.5**	**257.2**
Adjusted EPS (Rs) (excl. extra ord.)	**5.86**	**6.48**	**6.95**	**9.75**	**14.51**	**13.42**
Reported EPS (Rs) (incl. extra ord.)	**5.86**	**6.94**	**7.24**	**9.75**	**14.93**	**12.74**

19%
TOTAL INCOME CAGR (FY21-26)

24%
EBITDA CAGR (FY21-26)

26%
ADJUSTED NET PROFIT CAGR (FY21-26)

(Consolidated)

Balance Sheet

Particulars (INR Mn)	FY'25	FY'26	H1FY'27
Equity and Liabilities			
Shareholders' Fund			
Share Capital	201.9	201.9	201.9
Reserves & Surplus	1,241.2	1,485.7	1,595.8
Minority Interest	1.7	2.1	2.2
Total Shareholders Funds	**1,444.9**	**1,689.8**	**1,800.0**
Non-Current Liabilities			
Long Term Borrowings	5.1	4.4	4.0
Long Term Provisions	36.1	49.8	52.6
Total Non-Current Liabilities	**41.2**	**54.2**	**56.7**
Current Liabilities			
Short Term Borrowings	0.7	0.7	0.8
Trade Payables	49.6	93.7	138.3
Other Current Liabilities	171.2	251.9	307.9
Short Term Provisions	19.9	6.0	6.0
Total Current Liabilities	**241.4**	**352.4**	**453.0**
Total Equity and Liabilities	**1,727.5**	**2,096.4**	**2,309.6**

Particulars (INR Mn)	FY'25	FY'26	H1FY'27
Assets			
Non-Current Assets			
Fixed Assets			
(a) Property, Plant & Equipment	13.2	12.9	9.4
(b) Intangible Assets	34.4	35.8	63.7
(c) Intangible Assets under development	4.2	46.3	20.3
Non Current Investments	27.5	113.1	114.3
Deferred Tax Assets (Net)	2.6	14.7	14.8
Long Term Loans & Advances	0.6	-	-
Other Non Current Assets	18.3	2.6	6.6
Total Non-Current Assets	**100.8**	**225.5**	**229.0**
Current Assets			
Current Investments	-	33.0	30.0
Trade Receivables	174.0	220.9	203.0
Cash & Cash Equivalents	1,405.6	1,488.0	1,612.9
Short Term Loans & Advances	43.6	125.1	228.5
Other Current Assets	3.5	3.9	6.2
Total Current Assets	**1,626.6**	**1,870.9**	**2,080.5**
Total Assets	**1,727.5**	**2,096.4**	**2,309.6**

Corporate Social Responsibility

OM Foundation

OM Foundation is a Noida-based registered, secular, gender-sensitive and humanitarian public charitable trust. Founded in the year 2002 to provide education to the children of slums in Noida, OM today aims to make a significant contribution to the economically and socially disadvantaged citizens of India. Towards this, the Foundation has created, managed and supported programs aimed to bring about sustainable changes, predominantly in the field of education and employment for the underprivileged.

The Earth Saviours Foundation

In service of the underprivileged, destitute, abandoned and the old since 2008. The Earth Saviours Foundation has been dedicated to serving the underprivileged, providing a safe haven for mistreated animals, and making every possible effort to protect the environment.

Books for All Trust

Focused on bringing literacy and education to the weaker sections of the society. The Trust runs several libraries, career counselling and vocational trainings, and several sponsorships. They have recently started a literacy programme to empower women.

SightSavers India

Sightsavers have been working in India since 1966 to eliminate avoidable blindness and support people who are irreversibly blind to lead independent lives. Sightsavers' work in India has enabled thousands of people to lead lives of independence and dignity. Sightsavers have been working with government and local partners and have supported the treatment of millions of people with eye disorders.

WHEELS Global Foundation

It runs with the mission to 'Transform 20% of Rurban India by 2030 by harnessing full potential of the technology heritage & massive ecosystem of highly regarded IIT system & its well-resourced alumni community & aligned professionals.

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Building For What's Next
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Thank You

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