

Ref: UAF/2025-26/48

Tuesday | February 17, 2026 | Jaipur

To,
BSE Limited
Phirozee Jeejeebhoy Towers,
Dalal Street, Mumbai-400001, Maharashtra
Scrip Code: 539314 Script Symbol: UNIAUTO ISIN: INE203T01012

Sub.: Regulation 30- Investor Presentation on Q3 & 9M of FY 2025-26

Dear Sir/ Madam,

Pursuant to Regulation 30 of Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, the Investor Presentation for the Quarter and Nine Months ended on December 31, 2025 of our Company is enclosed herewith. The same has also been placed on the website of the Company.

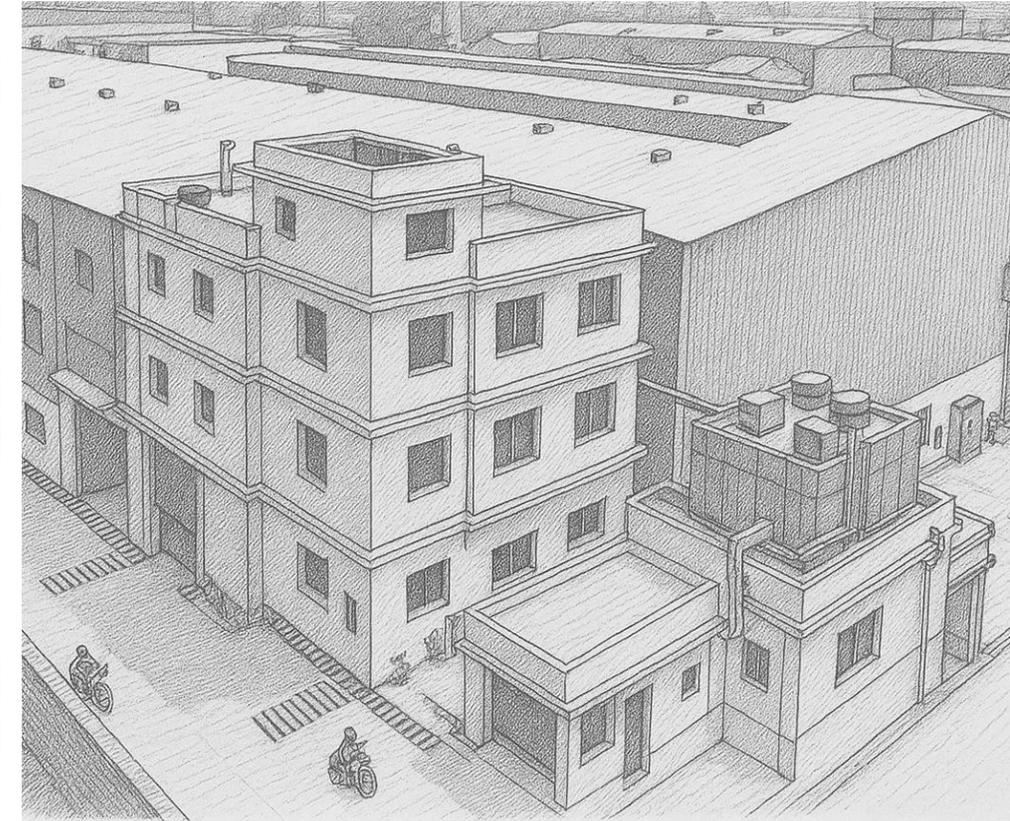
Request you to take the above information on record.

**Thanking you,
Yours faithfully,**

For Universal Autofoundry Limited

**Jayanti Jha Roda
(Company Secretary & Compliance Officer)
Membership No. A50623**

Encl: A/a



INVESTOR PRESENTATION

Q3FY26





SAFE HARBOR STATEMENT



This Release / Communication, except for the historical information, may contain statements, including the words or phrases such as 'expects, anticipates, intends, will, would, undertakes, aims, estimates, contemplates, seeks to, objective, goal, projects, should' and similar expressions or variations of these expressions or negatives of these terms indicating future performance or results, financial or otherwise, which are forward looking statements

These forward looking statements are based on certain expectations, assumptions, anticipated developments and other factors which are not limited to, risk and uncertainties regarding fluctuations in earnings, market growth, intense competition and the pricing environment in the market, consumption level, ability to maintain and manage key customer relationship and supply chain sources and those factors which may affect our ability to implement business strategies successfully, namely changes in regulatory environments, political instability, change in international oil prices and input costs and new or changed priorities of the trade

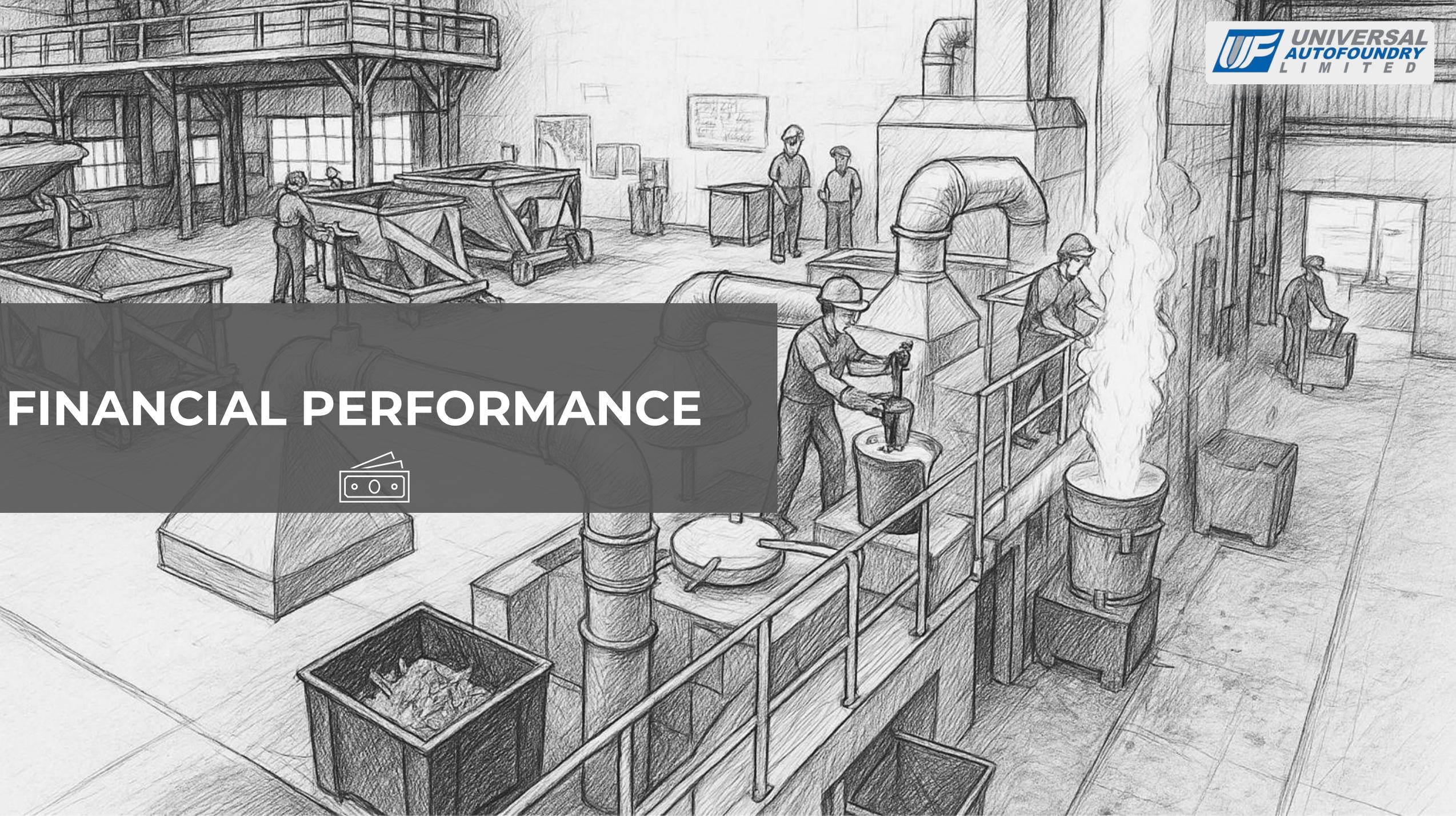
Universal Autofoundry Ltd ("The Company"), therefore, cannot guarantee that the forward-looking statements made herein shall be realized. The Company, based on changes as stated above, may alter, amend, modify or make necessary corrective changes in any manner to any such forward looking statement contained herein or make written or oral forward-looking statements as may be required from time to time on the basis of subsequent developments and events. The Company does not undertake any obligation to update forward looking statements that may be made from time to time by or on behalf of the Company to reflect the events or circumstances after the date hereof



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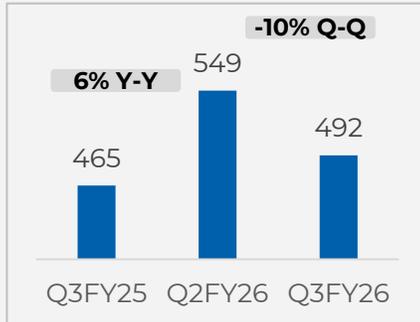
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FINANCIAL PERFORMANCE

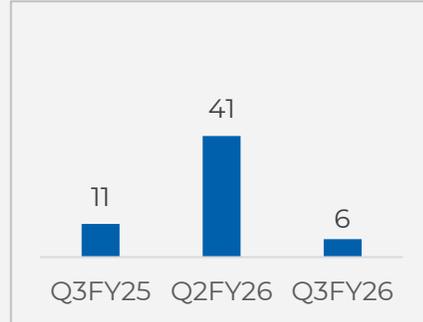


Q3FY26 and 9MFY26 – FINANCIAL HIGHLIGHTS

REVENUE (₹ Mn)



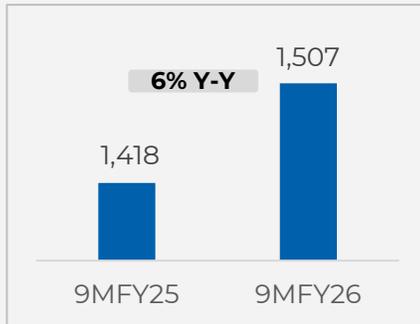
EBITDA (₹ Mn)



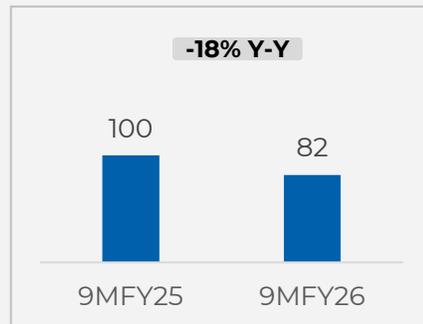
PAT (₹ Mn)



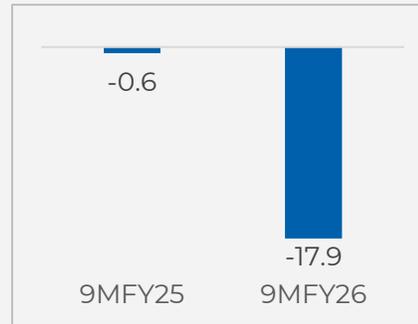
6% Y-Y



-18% Y-Y



-0.6



Q3FY26 Financial Snapshot

1.2%
EBITDA Margin
(%)

5.1%
ROCE
(%)

3.4%
ROE
(%)

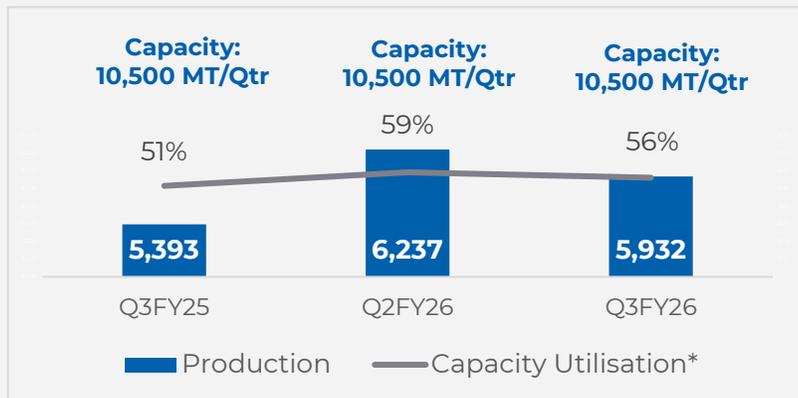
Financial Highlights

- Revenue for Q3FY26 was up **6% Y-Y**, reflecting steady demand momentum despite a 10% Q-Q moderation following a strong Q2. The sequential decline is seasonal and we expect momentum to pick up into FY27
- Volume growth remained strong at **10% Y-Y**, led by healthy performance in the **Tractor and M&HCV segment**. Earth-moving equipment volumes remained soft. We expect tractor-led strength and an improving equipment cycle to support growth going ahead
- EBITDA for Q3FY26 stood at ₹6 mn, a decline compared to Q2 (₹41 mn). EBITDA margins came in at 1.2%, primarily **impacted by higher raw material costs** during the quarter
- Depreciation and finance costs were also higher on a q-q basis. Additionally, elevated power and fuel expenses during the quarter further weighed on overall profitability, resulting in margin compression
- The 5MW solar power plant commissioned recently is expected to support margin improvement through lower power and fuel costs in the coming quarters
- Further, we have initiated work on the installation of an additional solar power project with a capacity of up to 8MW in Churu. The project is expected to be commissioned within the next six months. Upon commissioning, we anticipate a significant reduction in overall power costs, which should support profitability

*Refer Chartbook at the end for historical snapshot; Return ratios are based on September 2025

Q3FY26 – OPERATIONAL HIGHLIGHTS

PRODUCTION

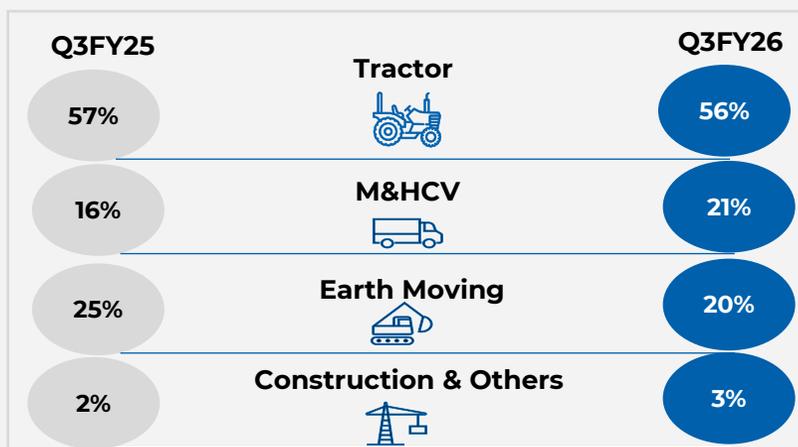


*Capacity Utilization has been annualized

EBITDA/kg (₹)



REVENUE BREAKUP BY MARKET SEGMENT



EXPORTS (₹ Mn)



Operational Highlights

- New contractual arrangement with Kranti Industries is operational from January 2026. We expect synergies to show over the medium term both on topline and profitability
- Production for Q3FY26 stood at 5,932 MT, translating to ~56% capacity utilisation (vs. 59% in Q2). While sequential utilisation moderated slightly, it remains meaningfully higher than Q3FY25, reflecting improved scale versus last year
- **The New Ferrous Line (HPML Line)** continues to operate at a capacity of 12,000 MT per year, currently running **one full shift**. As volumes ramp up, we expect further improvement in utilization levels over the coming quarters
- EBITDA per kg stood at ₹1.0 in Q3, declining from ₹6.5 in Q2. Q3 is seasonally lower as was the case last year and we expect this to return to long term averages into the next few quarters.
- Exports stood at **₹10.4 mn in Q3FY26**, down 58% Q-Q and up 50% Y-Y. This was impacted on account of US tariff on one prominent US customer. However, given **recent announcements of trade deals** with the EU and US, we expect **momentum to pickup** significantly into FY27. Exports will be a significant tailwind over the medium term.

*Refer Chartbook at the end for historical snapshot

STRATEGIC COLLABORATION WITH KRANTI INDUSTRIES



Partnership Overview

Seven-year agreement with Kranti Industries Ltd. for an integrated casting and machining model effective



Operational Structure

UAL to lease Sargoth machining premises and equipment to Kranti Industries. Machines from the Jaipur plant will be shifted to Sargoth and used as the central machining hub



Unit Management

Kranti Industries will exclusively manage machining of UAL's casting components, ensuring seamless coordination



Value Chain Integration

Partnership aims to build an integrated value chain, improve quality, efficiency, and optimize costs



Geographic Expansion

Expands Kranti's presence in Northern India and allows UAL to focus on core foundry strengths



Timeline

The collaboration has become effective from January 1, 2026, and will remain active for seven years, with a three-year lock-in period



Leadership Vision

Company leaders highlight significant operational synergies, innovation, and enhanced customer focus



FOCUS ON HIGH GROWTH SECTORS

- UAL had historically supplied majorly to the agricultural tractor segment (**formed more than 45% of total revenues in FY24-25**)
- Ongoing initiatives to **reduce reliance on the cyclical tractor segment** to minimize business volatility and diversify operations
- M & HCV, Construction, Engineering and other sectors to **form more than 75%** of overall revenue mix over the next 3-5 years



IMPROVE CAPACITY UTILIZATION

- **The current capacity utilization averaged 55% at the end of Q3FY26.**
- **The New Ferrous Line** (HPML Line) **was operational in FY25** with production capacity of 12,000 MT/ Year
- **Capacity Utilization expected to improve** from FY27 onwards to **65% inclusive of unit –3 capacity**



DRIVE OPERATIONAL EFFICIENCY

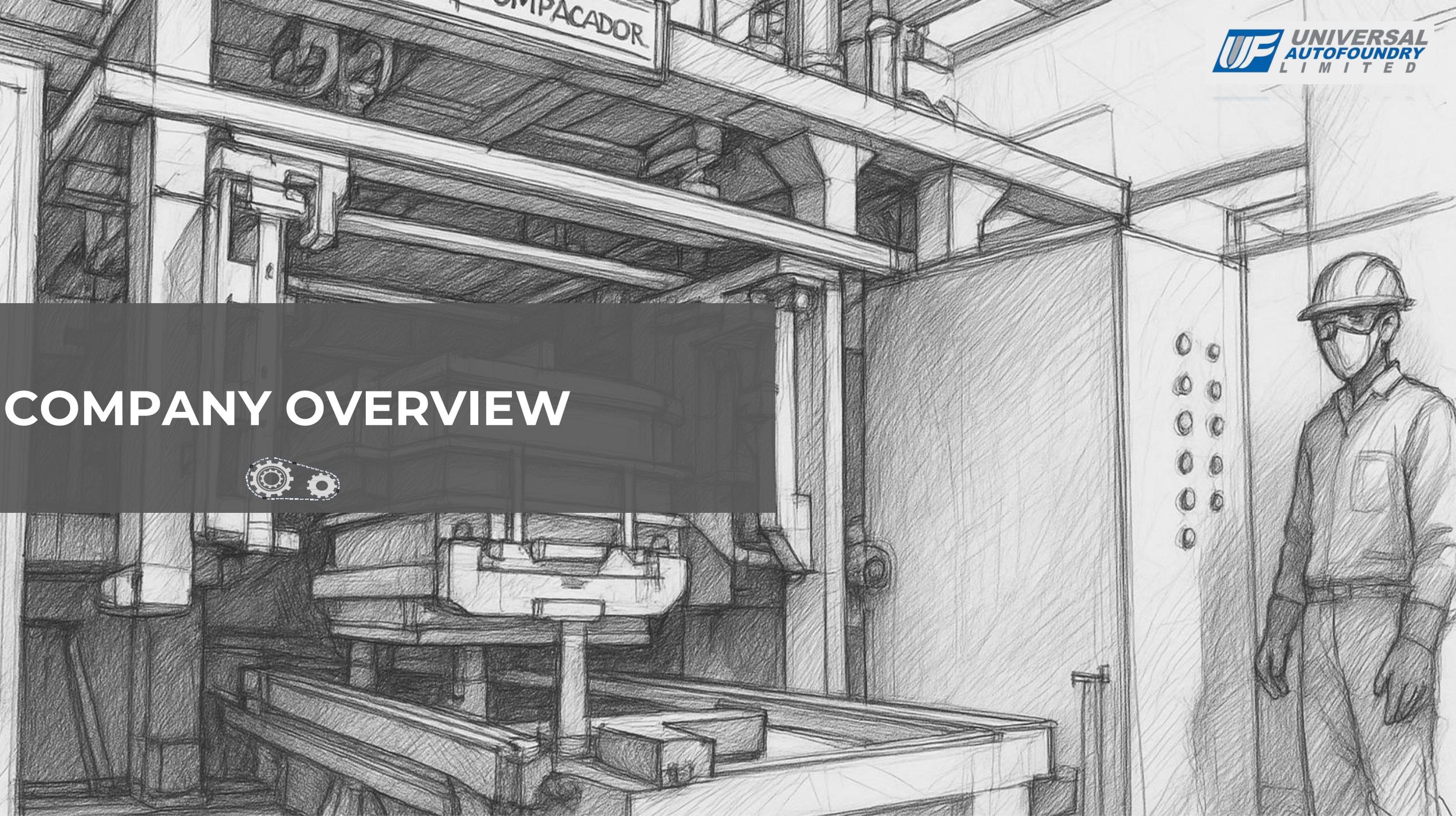
- Improved capacity utilization to **drive economies of scale** and **support margin expansion**
- Commissioning Solar Plant (5MWp) near Bikaner.
- Ongoing efforts to reduce costs and streamline operations will see benefits into FY27



DIVERSIFY ACROSS NEW GEOGRAPHIES

- **Leverage strong domestic demand as a stable foundation for growth and expansion initiatives**
- Strengthen presence in existing international markets through targeted investments and partnerships
- Scale up export capabilities particularly after the trade deals with EU and US. Exports projected to contribute **~10% to revenues over the next 3 years**

COMPANY OVERVIEW



ABOUT US

- **World class manufacturer and Exporter of Grey Cast Iron, and Ductile Iron Machined castings**
- **State of the art plants. Facilities are in Jaipur and nearby industrial hubs**
- **Can make any grade in Cast iron & SG Iron. Can make items starting from 5 Kg to 150 Kgs**
- **Machining capabilities – delivering ready-to-use product to customer**
- **Supplying intricate, cored and Fully Machined cast components (5 to 150 Kgs). Approx. 100,000 quantities of casting and machined components per Month to OEMs, MNCs and Export Market**
- **Installed a casting capacity of 42,000 MT / Year**
- **Three units with a combined built-up manufacturing area of ~22,000 Sq. Meter**
- **Fully integrated casting and machining operations in environmentally friendly foundry and machine shops**



OUR JOURNEY



Incepted in year **1972** as a partnership firm



1995: Changed from Coke fired Cupola Furnace to Electric Induction Furnace



1999: Started producing SG (Ductile) Iron Casting Components



2003: Direct Exports started to European Countries



2022: Migrated to BSE Main Board



2019: Installed 2nd High Pressure Molding Line, Disa Flex 70 HS, reaching to a total production capacity of 30,000 MT / Annum



2015: Converted into a Public Limited Company with the name Universal Autofoundry Limited. Listed on Bombay Stock Exchange, SME Board



2009: Installed 1st High Pressure Molding Line by SINTO Japan, reaching to a capacity of 10,000 MT / Annum. Further, Universal Autofoundry was converted into Private Limited company from a partnership firm with the name Universal Autofoundry Private Limited



2023: Major expansion in Machine Shop, total 48 machine tools in-house including HMC's, VMC's, VTL's & CNC Turning Centres



2023: Exports to more than 15 countries including USA, Italy, Spain, France, Brazil, UAE, various Southeast Asian Countries, etc.



2024: Installed 3rd High Pressure Molding Line, RHINO, reaching to a total production capacity of 42,000 MT / Year



2025: Added Non-Ferrous Aluminum Casting Facility by installing an HPDC Line (400 T) & a GDC Line Set Up

MANUFACTURING FACILITIES: Unit 1



Unit 1 JAIPUR

Universal Group has installed casting capacity of 42,000 MT/Year

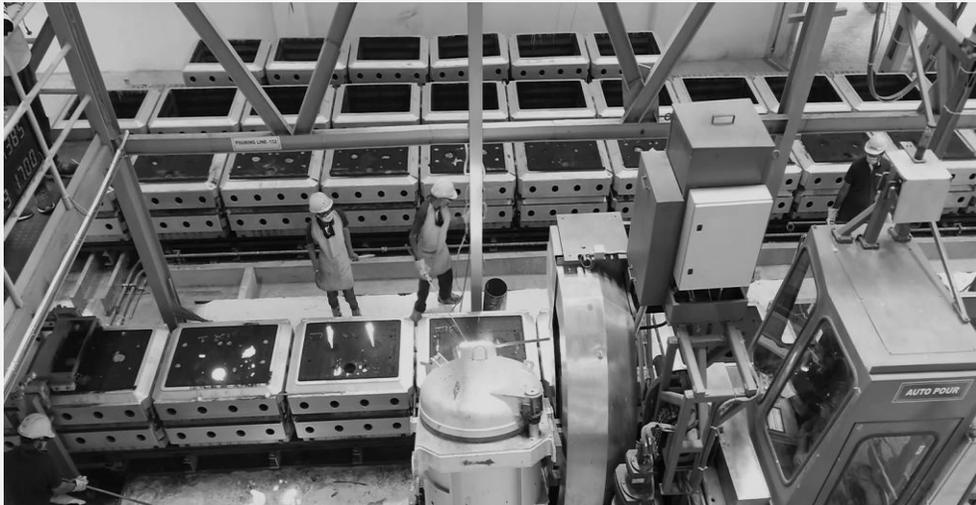
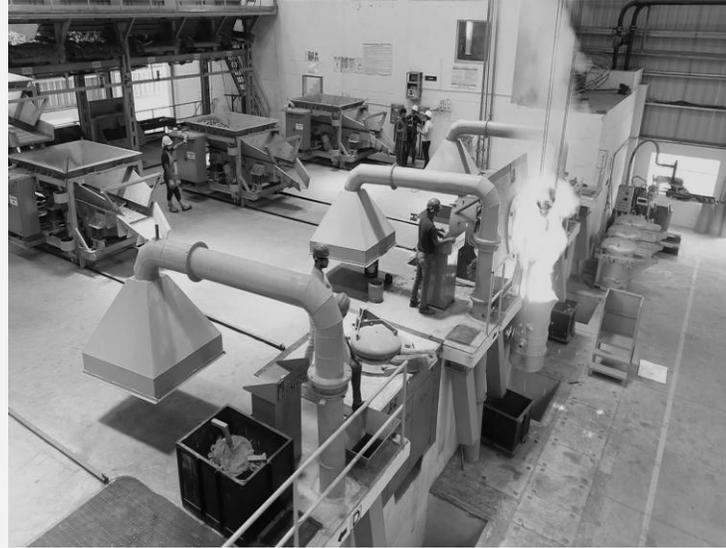
Three units with combined built-up manufacturing area of around 22,000 Sq. Meter, catering to different sizes of Castings

Additional 30,000 Sq. Meter of Land area available for further expansion (adjacent to Unit 3)

- Facility located in Jaipur
- State of the art SINTO HPML molding line capable of producing castings weighing between 5 – 25 kg
- Capacity at Unit 1 is 10,000 MT per year
- Fully integrated casting and machining operation in an environmentally friendly foundry

MANUFACTURING FACILITIES: Unit 2

Unit 2 REENGUS



- Facility located in Reengus, about 50 kms from Jaipur
- State of the art DISA FLEX 70 HS HPML molding line capable of producing castings weighing between 40 – 150 kgs
- Capacity at Unit 2 is 20,000 MT per year
- Standalone Casting operation

MANUFACTURING FACILITIES: Unit 3



Unit 3 REENGUS

- Facility located in Reengus, located about 50 kms from Jaipur
- State of the art RHINO HPML molding line capable of producing castings weighing between 20 – 50 kg
- Capacity at Unit 3 is 12,000 MT per year
- Machines for Aluminum Castings have been installed successfully, an HPDC Line (400 T) & a GDC Line Set Up

DIVERSIFIED BUSINESS SEGMENTS

Commercial
vehicle Industry

○ Construction
Industry

○ Tractor
Industry

○ Earth Moving
Industry

○ Engineering
Industry

○ Export
Business



Cylinder
Hydraulic



Differential
Case



Flange



Brake
Piston Housing



Flywheel
Housing



Adapter
Plate



Pulley
Damper



Pulley Poly
V Groove



Mass



Bracket



Master
Clutch Housing



Support
Housing



Rear
Hub



Trunnion
Support



Rear Axle
Housing



Housing Rear
Axle Centre



Gear Box
Housing

MARQUEE CLIENTS ACROSS VERTICALS



TRACTORS



COMMERCIAL VEHICLES



OTHERS



DIVERSIFIED GLOBAL PRESENCE



MANAGEMENT TEAM & BOARD OF DIRECTORS

VIMAL CHAND JAIN

Chairman and Managing Director



- With over five decades of experience in the casting and foundry industry, Mr. Jain has developed extensive expertise in various aspects of manufacturing castings.
- He contributes significantly to the formulation of company policies & developmental activities.
- His responsibilities encompass the creation of business plans and fulfill the Company's vision.
- He assumes the responsibility of safeguarding company's compliance with health and legislative regulations. He maintains strong connections with trade and professional associations.
- Bachelor's degree in Engineering (Electrical) from Osmania University, Hyderabad.

VINIT JAIN

Whole Time Director and Chief Financial Officer



- With a professional journey spanning over 28 years, Mr. Jain possesses extensive industry knowledge and experience in finance. His contributions have been invaluable to the success of Autofoundry.
- He looks after business expansion and fund-raising function of the Company.
- He is heavily involved in budget maintenance, meticulously controlling expenditures to ensure they remain within the established limits.
- He manages overall finances of the Company with a primary focus on improving profit margins.
- Bachelor of Commerce (B.Com) degree and an MBA from Shivaji University Kolhapur (1997).

VIKRAM JAIN

Whole Time Director - Marketing



- Marketing specialist with a remarkable career spanning over 25 years.
- With his extensive knowledge and experience with Domestic & Overseas OEM's, he plays a pivotal role in shaping the company's strategic direction and achieving its business objectives.
- He actively engages in identifying opportunities, developing business strategies, & overseeing their implementation
- His work is driven by ensuring the delivery of high-quality services to its valued clients
- Bachelor of Engineering (BE) in Manufacturing Engineering from BMS College of Engineering in 1999.

GAJENDRA KUMAR TYAGI

Whole Time Director - Operations And NPD



- Seasoned professional specializing in operations and new product development
- With an impressive work experience of over 50 years, he brings a wealth of expertise to his role.
- Bachelor of Science (BSc) degree from Jamia Millia Islamia University in 1973.

AWARDS AND RECOGNITIONS



Star Performer Award in Product Group for 2021-22 & 2022-23
54th & 55th Export Awards in Ferrous Industrial Castings - Medium Enterprise category
by EEPC India (Engineering Export Promotion Council)
at Jaipur on 23rd December '2025 !!!



Kaizen Award (Silver)
17th CII NATIONAL COMPETITIVENESS & CLUSTER SUMMIT 2024
by CII - Centre of Excellence for Competitiveness for SMEs Confederation of Indian Industry
on Tuesday-Wednesday; 8-9 October 2024, at India Habitat Centre, New Delhi !!!

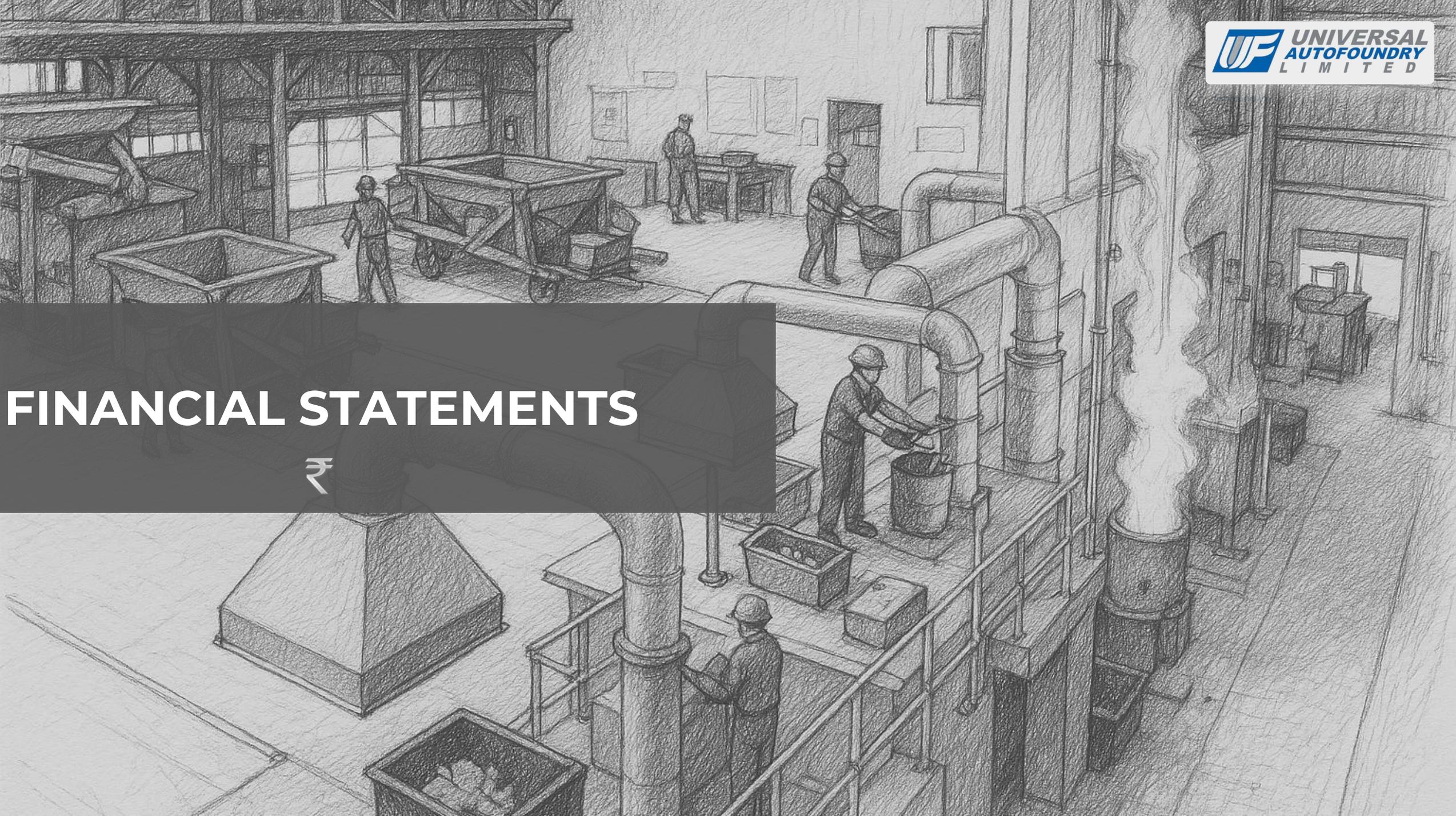


Export Excellence Star Performer Award in Industrial Castings Large Enterprise for FY 2019-20 & FY 2020-21 at the Regional Awards hosted and conferred by Engineering Exports Promotion Council EEPC INDIA.

The Awards were presented by the Honorable Chief Minister of Delhi Smt. Rekha Gupta and by H.E. Dr. Philipp Ackermann, German Ambassador to India on 28th May 2025.

FINANCIAL STATEMENTS

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FINANCIAL SNAPSHOT

Profit & Loss (₹ Millions)	Q3 FY26	Q2 FY26	Q-Q (%)	Q3FY25	Y-Y (%)	9M FY26	9M FY25	Y-Y (%)
Revenue from Operations	492	549	(10%)	465	6%	1,507	1,418	6%
Other Income	2	5		(0.1)		12	4	
Total Income	494	554	(11%)	464	6%	1,519	1,422	7%
Expenses								
Cost of Material Consumed	295	320		280		902	838	
Changes in Inventories of WIP & Finished Goods	(19)	(10)		(15)		(59)	(55)	
Employee Cost	77	81		74		229	221	
Finance Cost	13	6		9		27	25	
Depreciation and Amortisation Expense	30	24		30		79	75	
Other Expenses.	134	122		115		365	318	
Total Expenses	530	543	(2%)	492	8%	1,543	1,422	8%
Profit/ (Loss) Before Exceptional Items and Tax	(36)	10		(28)		(24)	0	
Less: Tax Provision	(6)	4		(7)		(6)	1	
PAT	(31)	6		(21)		(17.9)	(1)	

HISTORICAL FINANCIALS

Profit & Loss (₹ Millions)	FY 2023	FY 2024	FY 2025
Revenue from Operations	2,362	2,025	1,934
Other Income	9	7	5
Total Income	2,371	2,032	1,939
Expenses			
Cost of Material Consumed	1,562	1,151	1,062
Changes in Inventories of WIP & Finished Goods	(75)	33	(32)
Employee Cost	212	270	299
Finance Cost	40	26	33
Depreciation and Amortisation Expense	68	63	104
Other Expenses.	416	419	441
Total Expenses	2,223	1,963	1,906
Profit/ (Loss) Before Exceptional Items and Tax	148	69	33
Less: Tax Provision	30	24	6
Less: Deferred Tax Provision	13	-4	3
PAT	105	49	24

HISTORICAL FINANCIALS

Balance Sheet (₹ Millions)	2023	2024	2025	H1 FY26
Equity And Liabilities				
Equity				
(A) Equity Share Capital	121	124	124	124
(B) Other Equity	459	556	581	609
(C) Money against warrants		49	49	0
Total Equity (1)	580	729	754	734
Non-current Liabilities				
Long Term	166	205	155	248
Provisions	6	6	6	6
Deferred Tax Liabilities (Net)	4	0	3	0
Total Non-current Liabilities	176	211	164	254
Current Liabilities				
Borrowings	381	164	305	301
Trade Payables	193	118	127	144
Other Financial Liabilities	2	1	2	2
Provisions	31	27	8	28
Other Current Liabilities	33	49	50	46
Total Current Liabilities (3)	640	359	493	496
Total Equity And Liabilities (1+4)	1,396	1,300	1,411	1,484
Assets				
Non-current Assets				
Property, Plant And Equipment	362	349	611	743
Capital Work-in-progress	3	332	90	25
Other Non-current Assets	59	50	34	40
Deferred Tax Assets (Net)				3
Total Non-current Assets	425	731	735	812
Current Assets				
Inventories	203	170	235	270
Trade Receivables	476	374	404	362
Cash And Cash Equivalents	257	0.2	2	0.4
Other Current Assets	34	22	29	34
Other financial assets	1	2	5	6
Total Current Assets	971	569	676	672
Total Assets	1,396	1,300	1,411	1,484

Cash Flow Statement (₹ Millions)	2023	2024	2025
Cash Flows from Operating Activities			
Profit for the period	105	49	24
Adjustments for:			
Income tax expense	43	20	9
Finance costs	40	26	33
Interest income	(1)	(2)	(2)
Depreciation and Amortisation	68	63	104
(Profit)/Loss on sale of Fixed Assets	-	0	(0.1)
Operating Profit before Working Capital Changes	256	156	170
Movements in working capital:			
(Increase) / Decrease in trade receivables	(177)	102	(30)
Increase / Decrease in other liabilities (current & noncurrent)	15	16	2
(Increase)/decrease in inventories	(64)	33	(65)
(Increase)/decrease in other assets (current & noncurrent)	(39)	(14)	(16)
Increase/ (Decrease) in trade and other payables	14	(75)	9
Increase/(Decrease) in other liabilities & Provisions	(1)	1	0
Cash Generated from Movements in Working Capital	(253)	63	(100)
Cash generated from operations	3	220	70
Income taxes (paid)/ Refund received	(30)	(17)	(20)
Net Cash Generated by Operating Activities - (A)	(27)	203	50
Cash Flows from Investing Activities			
Interest received	0.7	2	2
Payments for PP&E	(25)	(359)	(108)
Proceeds from disposal of PP&E	-	1	0
Investments	-	-	0
Net Cash (Used in)/Generated by Investing Activities- (B)	(25)	(356)	(106)
Cash Flows from Financing Activities			
Proceeds from issue of equity instruments of the Company	257	52	0
Proceeds from issue of convertible warrants of the Company		49	
Proceeds from/ repayment of long-term borrowings	(18)	40	(50)
Proceeds from/ repayment of short-term borrowings	105	(217)	141
Dividends Paid	-	-	-
Interest and Finance Charges	(39)	(26)	(33)
Net (Used in)/ Generated in Financing Activities - (C)	303	(103)	58
Net Increase/ (Decrease) in Cash and Cash Equivalents (A+B+C+D)	251	(257)	2
Cash and cash equivalents at the beginning of the period	6	257	0.2
Cash and Cash Equivalents at the end of the period	257	0.2	2.3

Chartbook

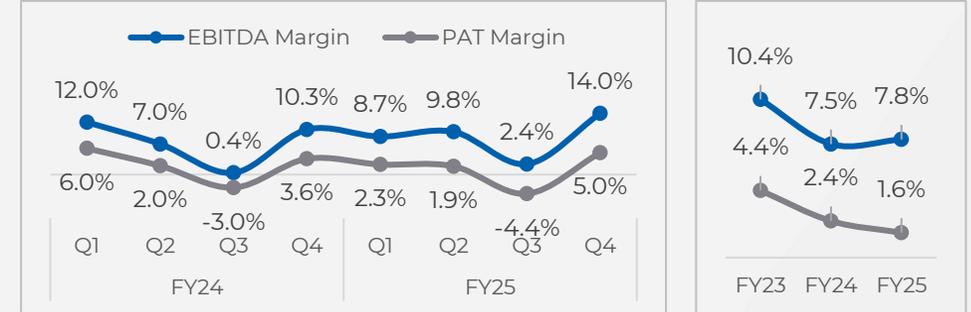


Chartbook (1/2)

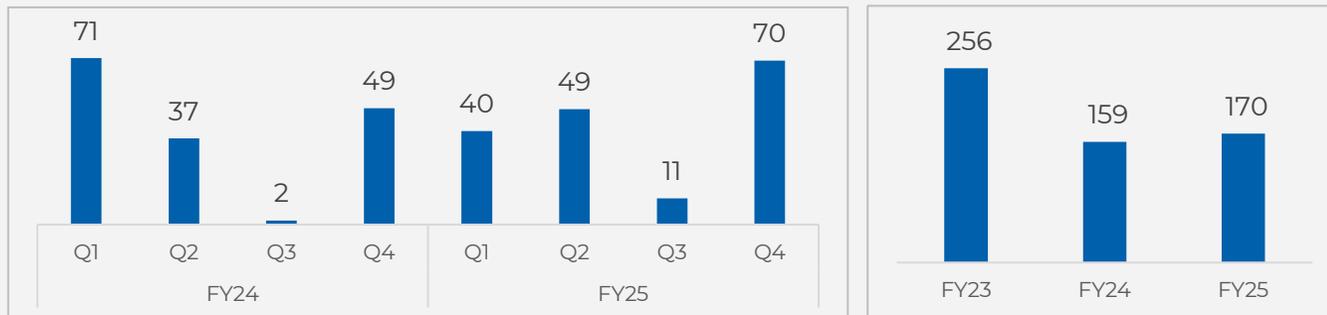
Revenue (Rs mn)



EBITDA and PAT Margin



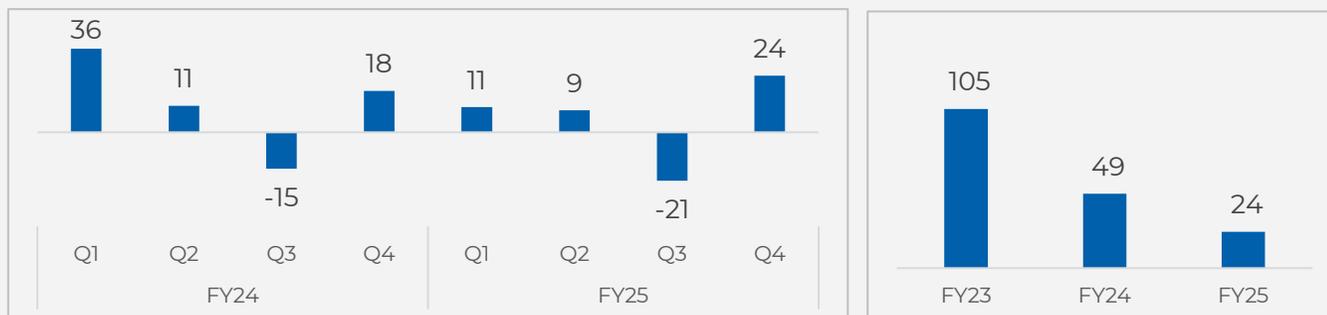
EBITDA (Rs mn)



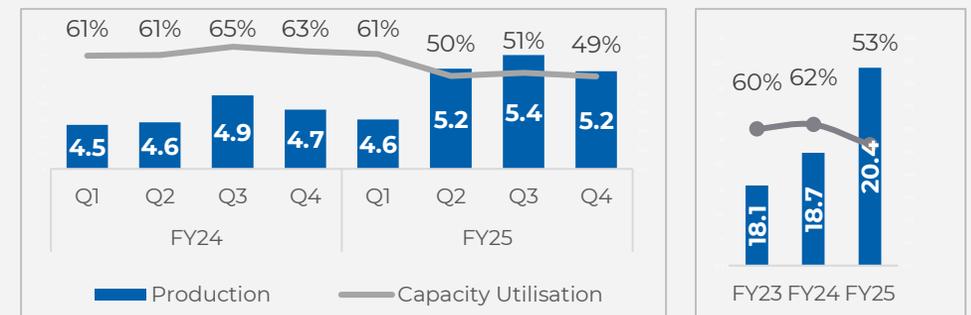
EBITDA / Kg



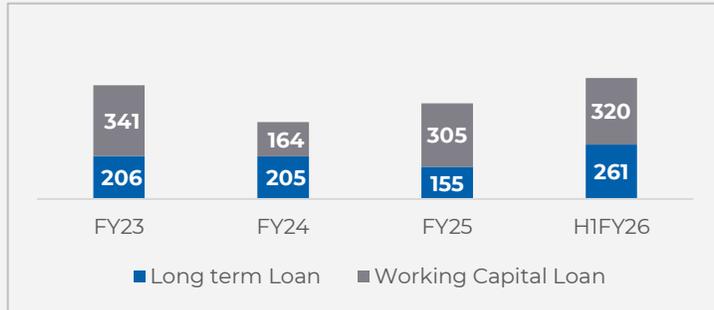
PAT (Rs mn)



Production ('000 mt) and Capacity Utilization



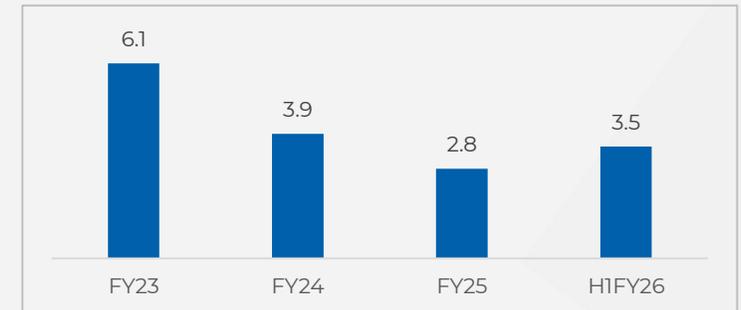
Borrowings (Rs mn)



Debt/Equity & Interest Coverage Ratio



Fixed Asset Turnover Ratio



ROE & ROCE (%)



Current Ratio



EPS & BVPS (Rs)





THANK YOU

UNIVERSAL AUTOFOUNDRY LTD

CIN: L27310RJ2009PLC030038

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