



CIL/SE/2025-26/13

May 26, 2025

BSE Limited

P.J. Towers
Dalal Street
Mumbai- 400 001

National Stock Exchange of India Limited

Exchange Plaza, C-1, Block G,
Bandra Kurla Complex, Bandra (E)
Mumbai - 400 051

Scrip code: 540710

Symbol: CAPACITE

Sub: Investor Presentation – Q4 & FY25

Ref: Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

Dear Sir/ Madam,

Please find enclosed Investor Presentation for the fourth quarter (Q4) and year ended March 31, 2025.

Kindly take this information on record.

This disclosure will also be available on the Company's website, viz. www.capacite.in.

For any correspondence or queries or clarifications, please write to cs@capacite.in.

Thanking you

Yours faithfully,

For Capacit'e Infraprojects Limited

Rahul Kapur

Company Secretary & Compliance Officer

Encl: a/a

Capacit'e Infraprojects Limited

Regd. Office: 605-607, Shrikant Chambers, Phase - 1, 6th Floor, Adjacent to R.K. Studios, Sion – Trombay Road, Chembur, Mumbai - 400 071, India. **Tel No.:** +91-022-7173 3733, **Fax.:** +91-022-7173 3733, **Email:** info@capacite.in

CIN: L45400MH2012PLC234318 | www.capacite.in



CAPACIT'E INFRAPROJECTS LIMITED

Q4 & FY 25 Investor Presentation





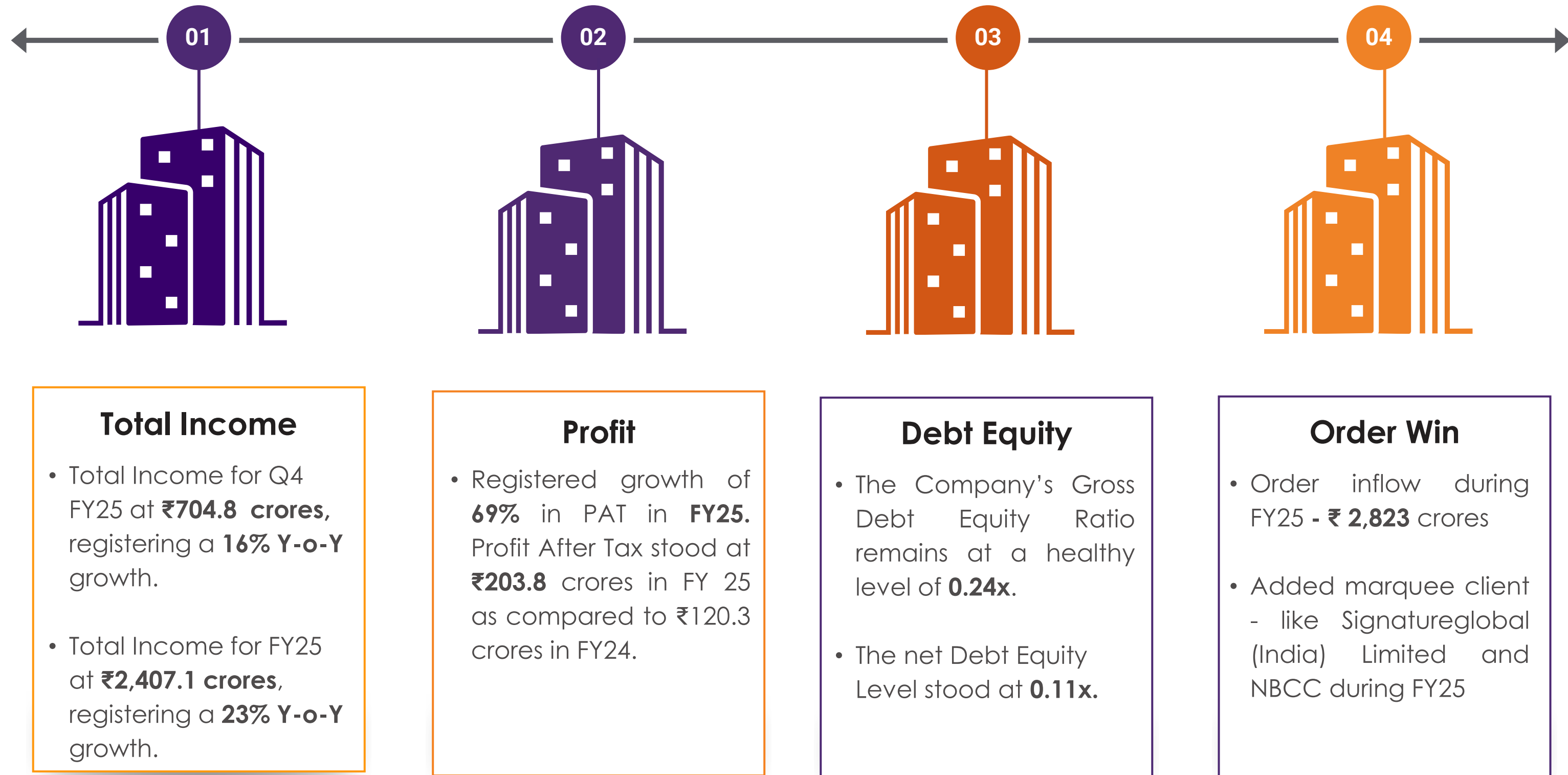
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This presentation contains certain forward looking statements concerning the Company's future business prospects and business profitability, which are subject to a number of risks and uncertainties and the actual results could materially differ from those in such forward looking statements. The risks and uncertainties relating to these statements include, but are not limited to, risks and uncertainties regarding fluctuations in earnings, our ability to manage growth, competition (both domestic and international), economic growth in India and abroad, ability to attract and retain highly skilled professionals, time and cost over runs on contracts, our ability to manage our international operations, government policies and actions regulations, interest and other fiscal costs generally prevailing in the economy. The Company does not undertake to make any announcement in case any of these forward looking statements become materially incorrect in future or update any forward looking statements made from time to time by or on behalf of the Company.



KEY HIGHLIGHTS



KEY FINANCIAL HIGHLIGHTS



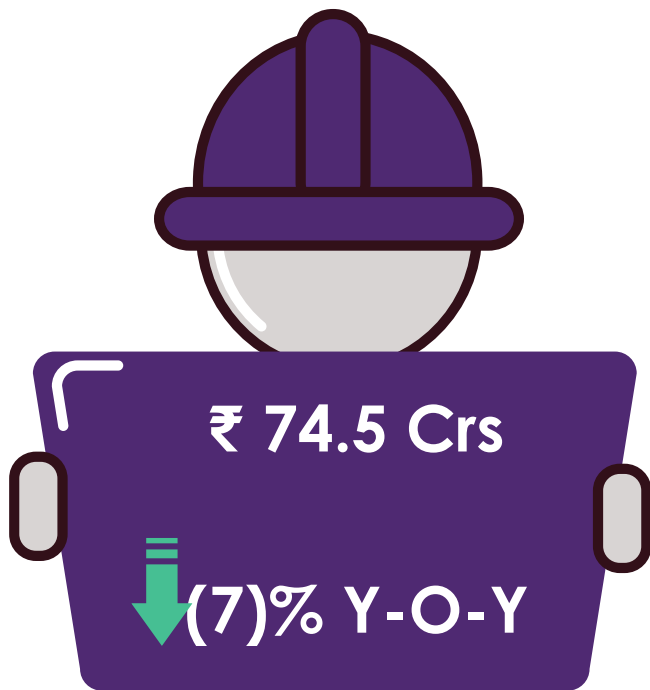
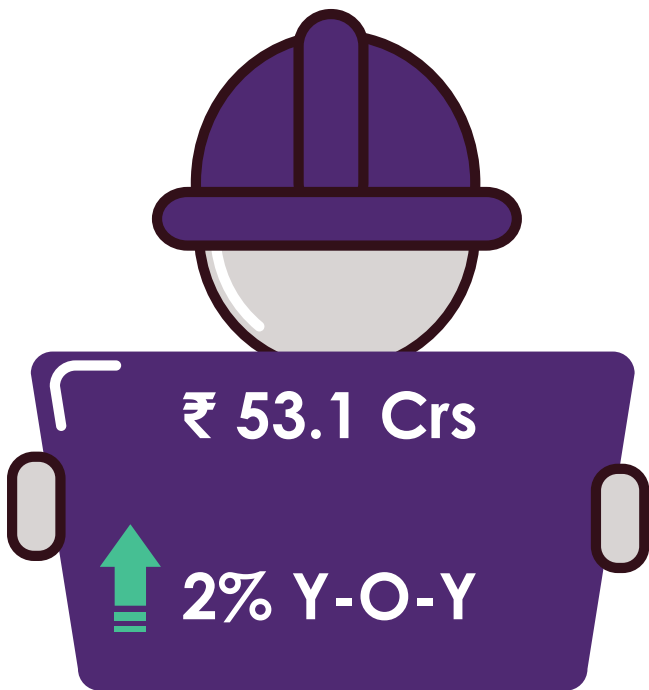
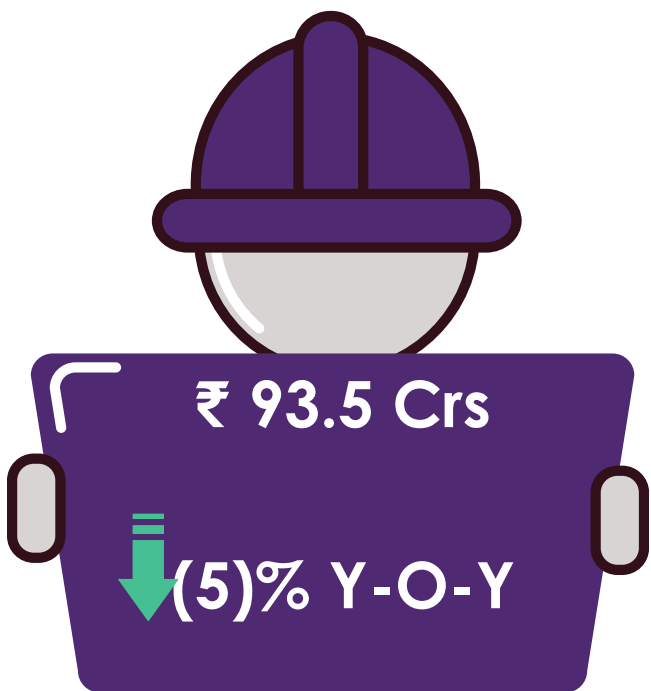
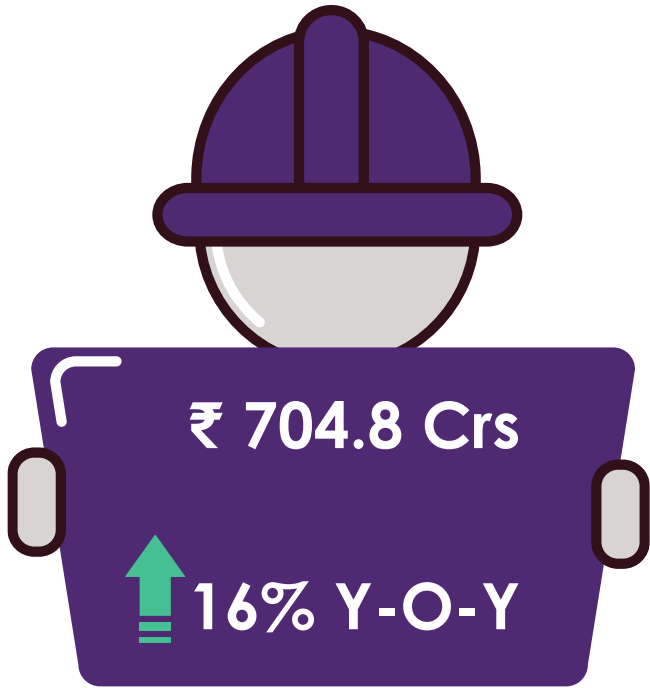
Total Income

EBIT

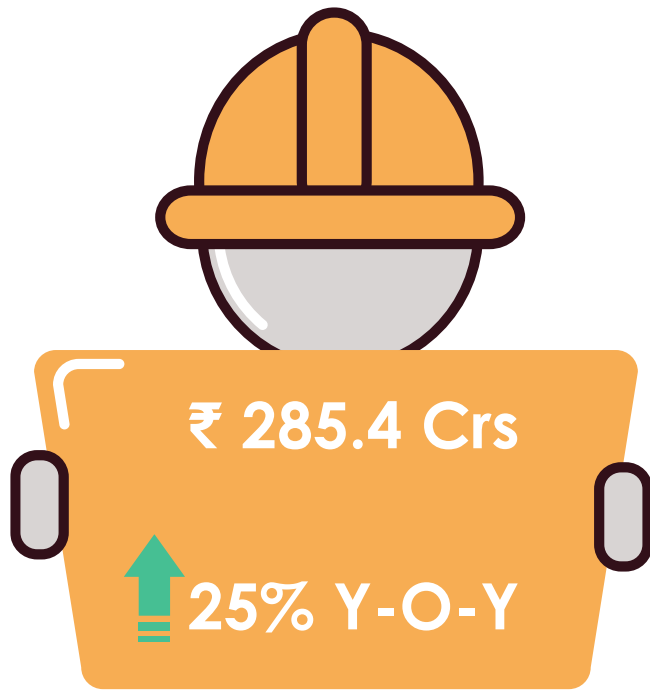
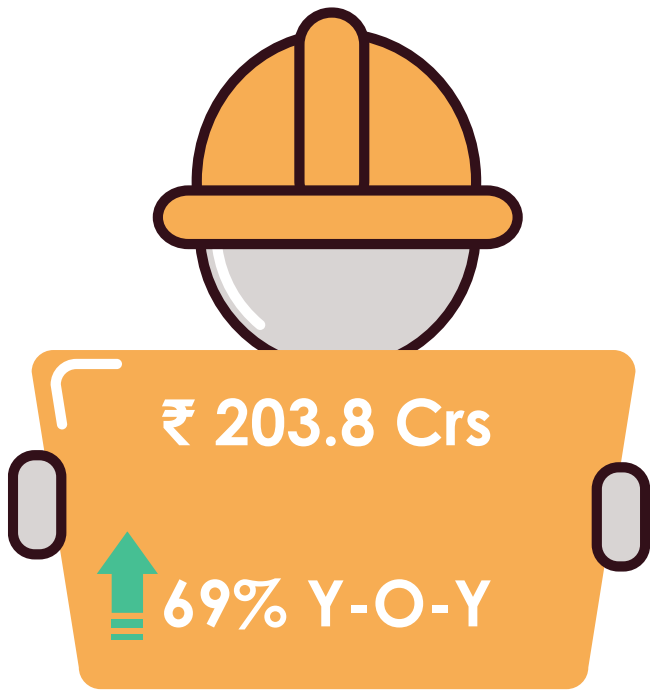
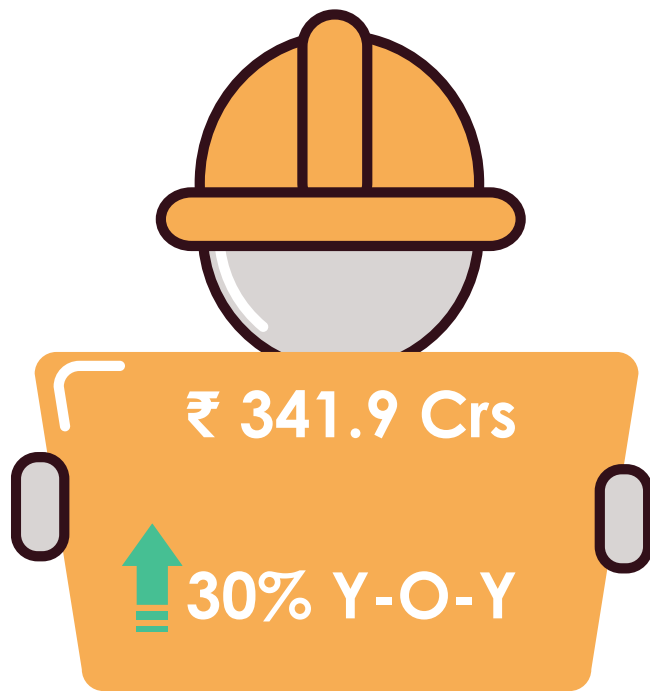
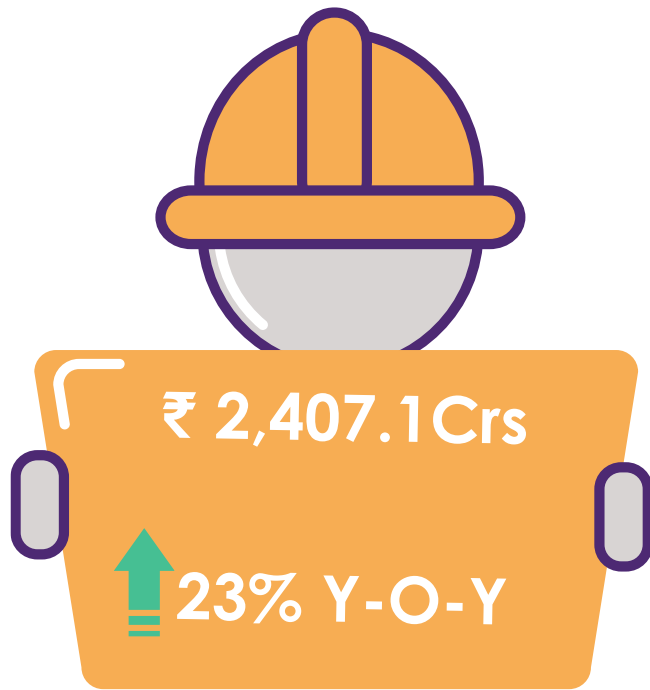
PAT

Cash PAT

Q4 FY25



FY25





The Auditors in their Audit Report for the period under review in the Emphasis of Matter Paragraph has drawn attention in respect of long outstanding trade receivables, other exposures and contract assets amounting to **₹ 63.6 crores** as on March 31, 2025, for which the Company based on advice of external legal counsel is confident of recoverability and accordingly believes that no further adjustments are considered necessary in the consolidated financial statements.

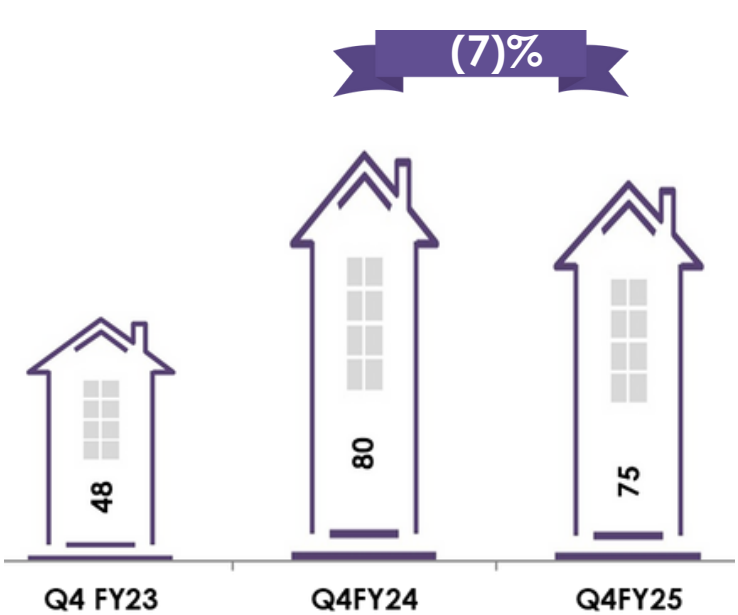
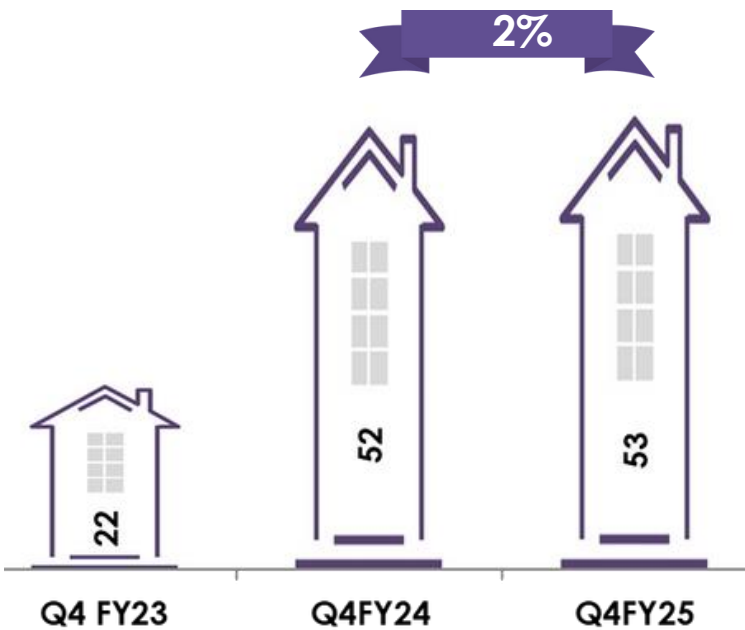
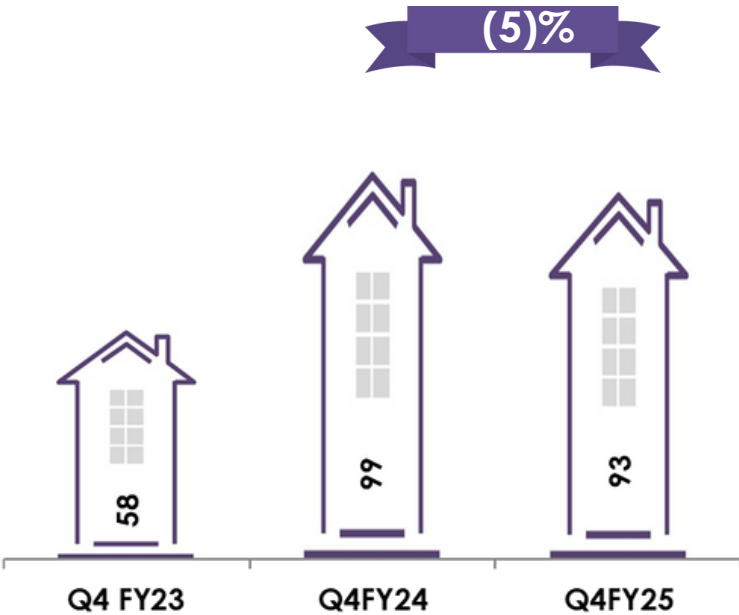
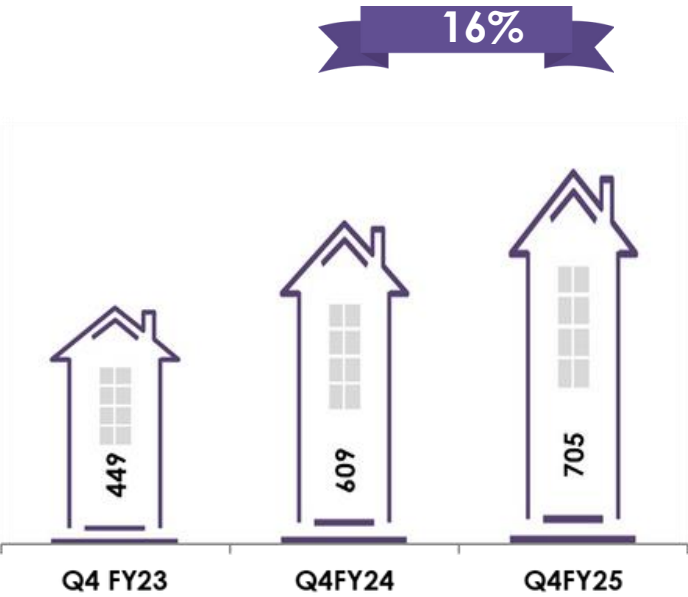
The Company would like to mention that in most of the cases referred above, the Company has agreement for sale of properties and settlement agreements. The fair value of these properties are estimated to be around **₹ 98.7 crores** which is sufficient to recover the outstanding amount and hence no provision is considered necessary.

Company have taken necessary legal steps before various legal forums namely NCLT, High Court, RERA Authorities, etc. to register the respective flats in its name including enforcement of available security to recover amount and secure its commercial interest.

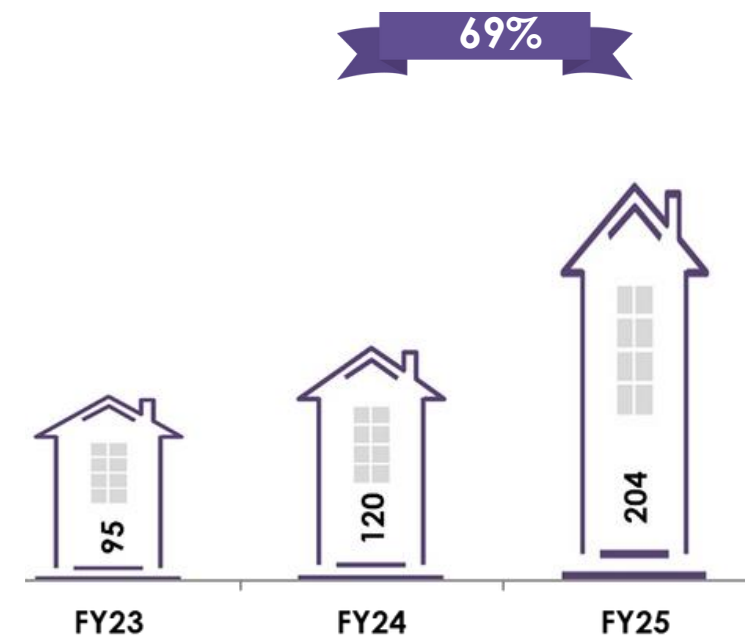
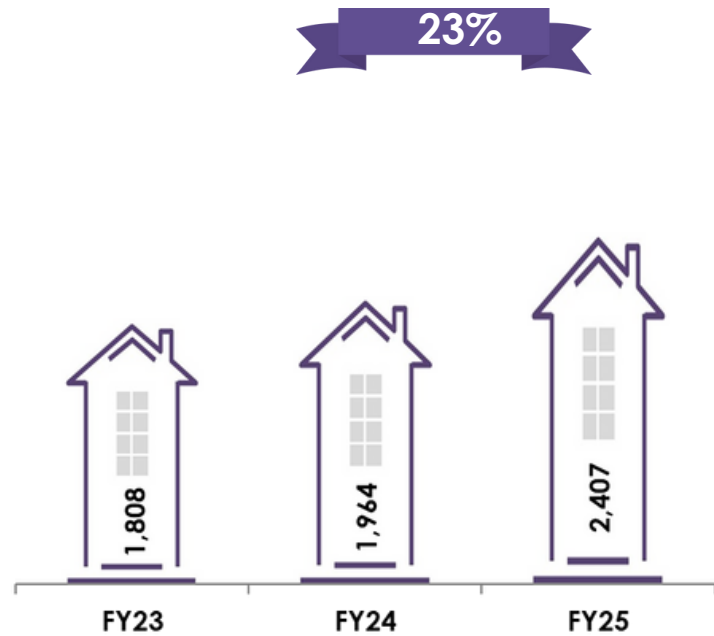
Q4 & FY25 - PERFORMANCE



Quarter



Year



• Total Income (₹ Cr) •

• EBIT (₹ Cr) •

• PAT (₹ Cr) •

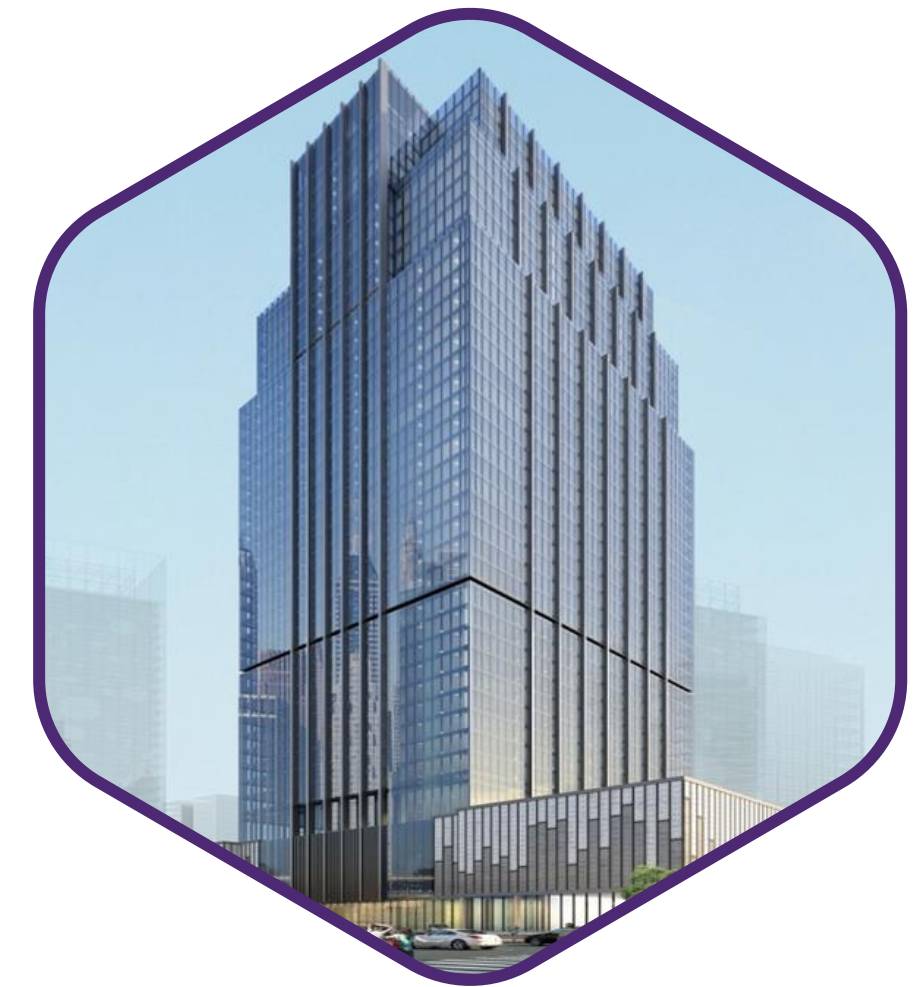
• CASH PAT (₹ Cr) •

CONSOLIDATED PROFIT & LOSS



Particulars (₹ In Crs)	Q4FY25	Q4FY24	Y-o-Y	Q3FY25	FY25	FY24	Y-o-Y
Revenue from Operations	671.3	598.9	12%	590.5	2,349.5	1,931.6	22%
Other Income	33.5	9.9		10.2	57.6	32.0	
Total Income	704.8	608.8	16%	600.7	2,407.1	1,963.7	23%
Cost of Material Consumed (Incl.Construction Expenses)	484.0	404.3		400.7	1,621.2	1,294.1	
Employee Expenses	38.8	29.6		39.2	149.3	124.4	
Other Expenses	62.8	54.0		60.3	199.6	181.8	
EBITDA	119.2	120.8	-1%	100.5	436.9	363.4	20%
EBITDA Margin (%)	16.9%	19.8%		16.7%	18.2%	18.5%	
Depreciation	25.8	22.3		24.7	95.1	101.4	
EBIT	93.4	98.6	-5%	75.8	341.9	262.0	30%
EBIT Margin (%)	13.3%	16.2%		12.6%	14.2%	13.3%	
Finance Cost	24.7	23.4		25.3	93.3	95.6	
Share of Profit/(loss) of JV & Associates (net)	2.1	-2.1		13.3	16.6	1.0	
Profit before Tax	70.8	73.1	-3%	63.8	265.1	167.4	58%
Profit before Tax Margin (%)	10.1%	12.0%		10.6%	11.0%	8.5%	
Tax	17.7	21.3		11.5	61.4	47.1	
Profit After Tax	53.1	51.8	2%	52.3	203.8	120.3	69%
PAT Margin (%)	7.5%	8.5%		8.7%	8.5%	6.1%	
Other comprehensive income	0.4	0.3		-0.2	-0.8	0.8	
Total other comprehensive income	53.5	52.1	3%	52.1	202.9	121.1	68%
Cash PAT	74.5	80.3	-7%	72.6	285.4	228.9	25%
Cash PAT Margin	10.6%	13.2%		12.1%	11.9%	11.7%	
Basic EPS	6.3	6.2		6.2	24.1	16.1	
Diluted EPS	6.3	6.2		6.2	24.1	16.1	

Other Income for the year mainly includes recovery of bad debts along with Interest to the tune of ₹ 20 crore.



CONSOLIDATED BALANCE SHEET



ASSETS (₹ In Crs)	Mar'25	Mar'24
NON-CURRENT ASSETS	798	760
Property, plant & equipment	573	585
Capital work-in-progress	2	9
Intangible assets	2	1
Right-of-use assets	9	3
Investments Properties	0	4
Investment in joint venture	20	3
Trade receivables	60	86
Investments	2	0
Other Financial Assets	70	24
Non Current tax assets (Net)	1	1
Other Non - current assets	59	43
CURRENT ASSETS	2,702	2,389
Inventories	110	111
Contract Assets	1,150	1,229
Trade receivables	1,080	548
Cash & Cash Equivalents	64	19
Bank balances	30	190
Other Financial Assets	81	99
Other Current assets	122	148
Non-current assets held for sale	65	45
TOTAL ASSETS	3,500	3,149

EQUITY & LIABILITIES (₹ In Crs)	Mar'25	Mar'24
EQUITY	1,720	1,517
Equity Share capital	85	85
Other equity	1,634	1,432
Non-Controlling Interest	1	0
NON-CURRENT LIABILITIES	326	289
Contract Liability	75	56
Borrowings	149	124
Lease Liability	5	1
Other financial liabilities	49	44
Provisions	1	5
Deferred tax liabilities (Net)	46	60
CURRENT LIABILITIES	1,454	1,343
Contract Liability	172	246
Borrowings	268	202
Lease Liability	4	2
Trade Payables	896	818
Other Financial Liabilities	33	35
Provisions	9	6
Current Tax Liabilities (net)	51	18
Other current liabilities	22	16
TOTAL EQUITY & LIABILITIES	3,500	3,149



CONSOLIDATED CASH FLOW



Particulars (₹ In Cr)	FY 25	FY 24
PBT	265	167
Adjustments	237	267
Operating profit before working capital changes	503	435
Changes in working capital	(409)	(467)
Cash generated from operations	94	(33)
Direct taxes paid (net of refund)	(42)	(6)
Net Cash from Operating Activities	52	(39)
Net Cash from Investing Activities	(9)	(152)
Net Cash from Financing Activities	2	182
Net Change in cash and cash equivalents	45	(10)
Opening Cash Balance	19	29
Closing Cash Balance	64	19



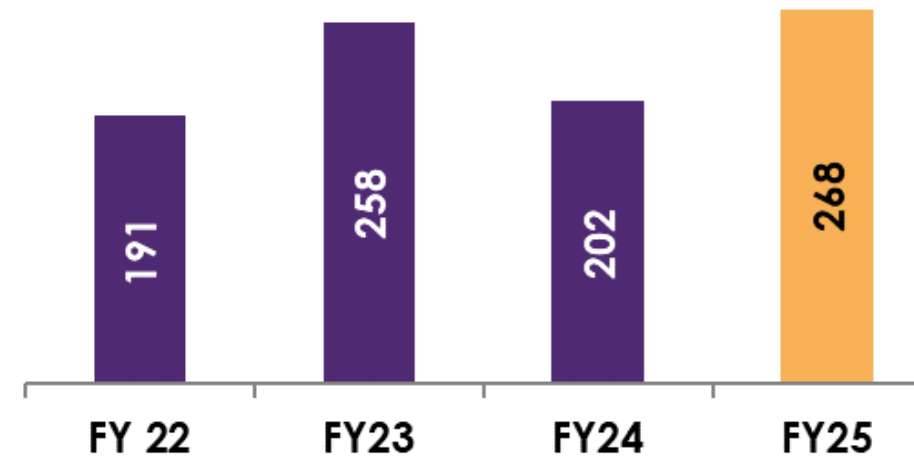
CONSOLIDATED DEBT POSITION



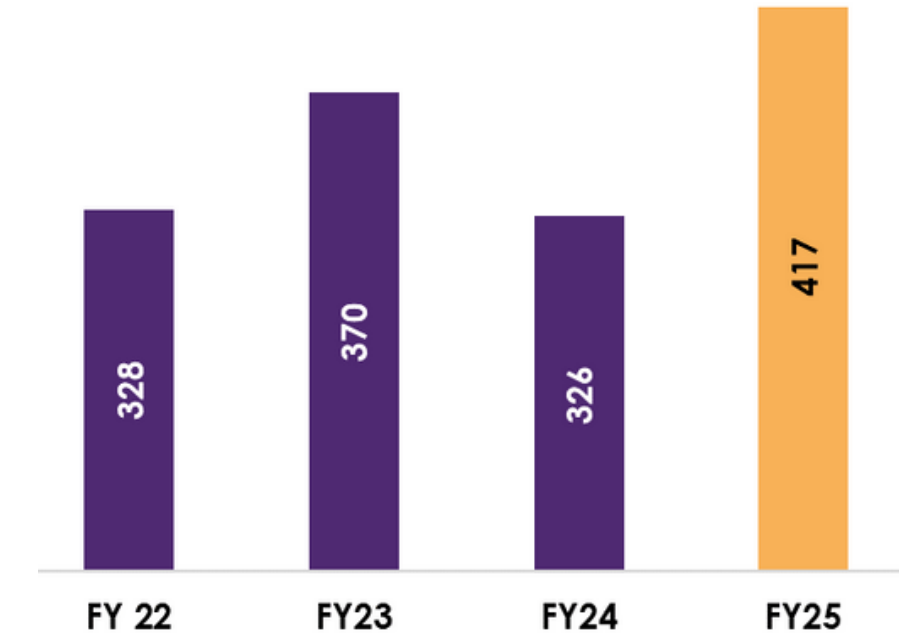
• Long Term (₹ cr) •



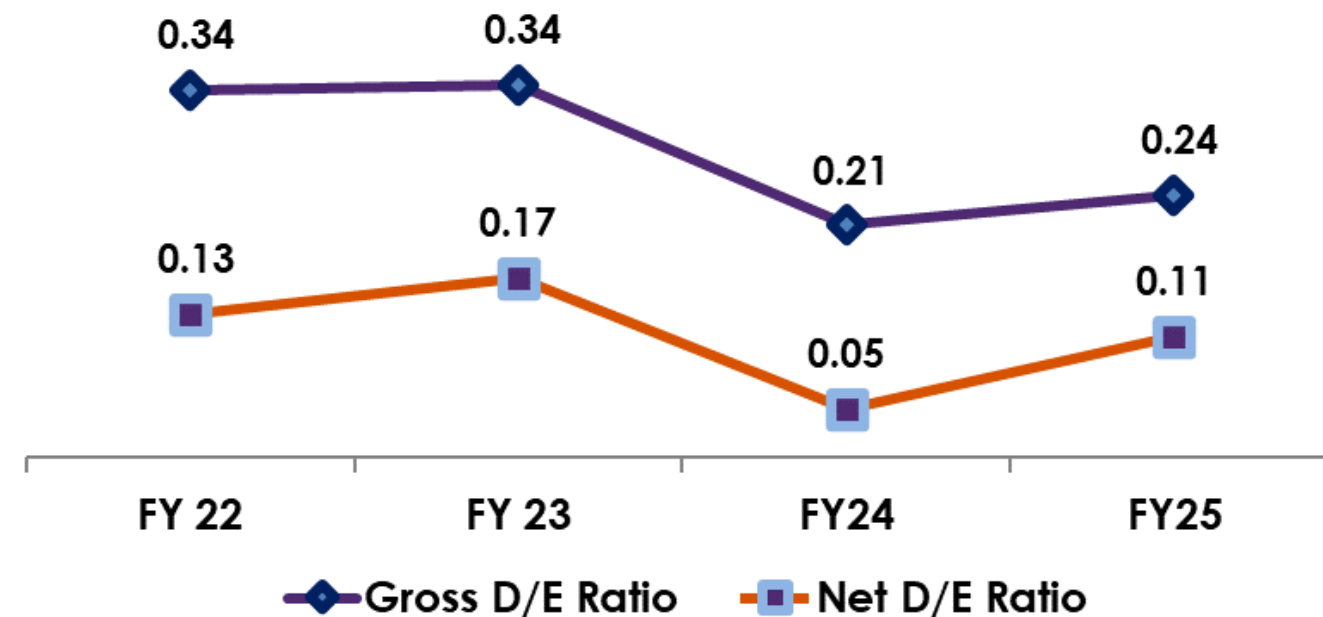
• Short Term (₹ cr) •



• Gross Debt (₹ cr) •



Debt Equity Ratio



- Gross debt equity ratio within comfort level at **0.24x** as on March 31, 2025 as compared to 0.21x as on March 31, 2024. **The temporary increase in Gross debt is likely to be reduced during H1FY26**
- Healthy Net debt equity ratio at 0.11x as on March 31, 2025
- Focus to reduce fund based debt in medium to long term and improve profitability and return ratio



CORPORATE OVERVIEW



✓ Leading Construction Company

Incorporated in 2012, Capacit'e Infraprojects is a focused EPC company that provides an end-to-end construction service for buildings and factories across sectors

✓ Delivery Track Record

Capacit'e single segment focus, customer commitment and delivery track record has helped us to become preferred partner as well as qualify for large public sector projects



✓ Presence across building segments

Presence across Residential building, Commercial buildings, such as data centres and buildings for educational, hospitality and healthcare purposes etc

✓ Strong and diversified order book

Successfully constructed more than 70+ mn sq.. ft area across segments in the limited operational history of 12 years. **Holds Limca Book of Record for fastest hospital construction**



Residential Buildings

High Rise, Super High Rise buildings -Shell & Core Work;
Complete Lock & Key Works; MEP Works etc

Commercial Buildings

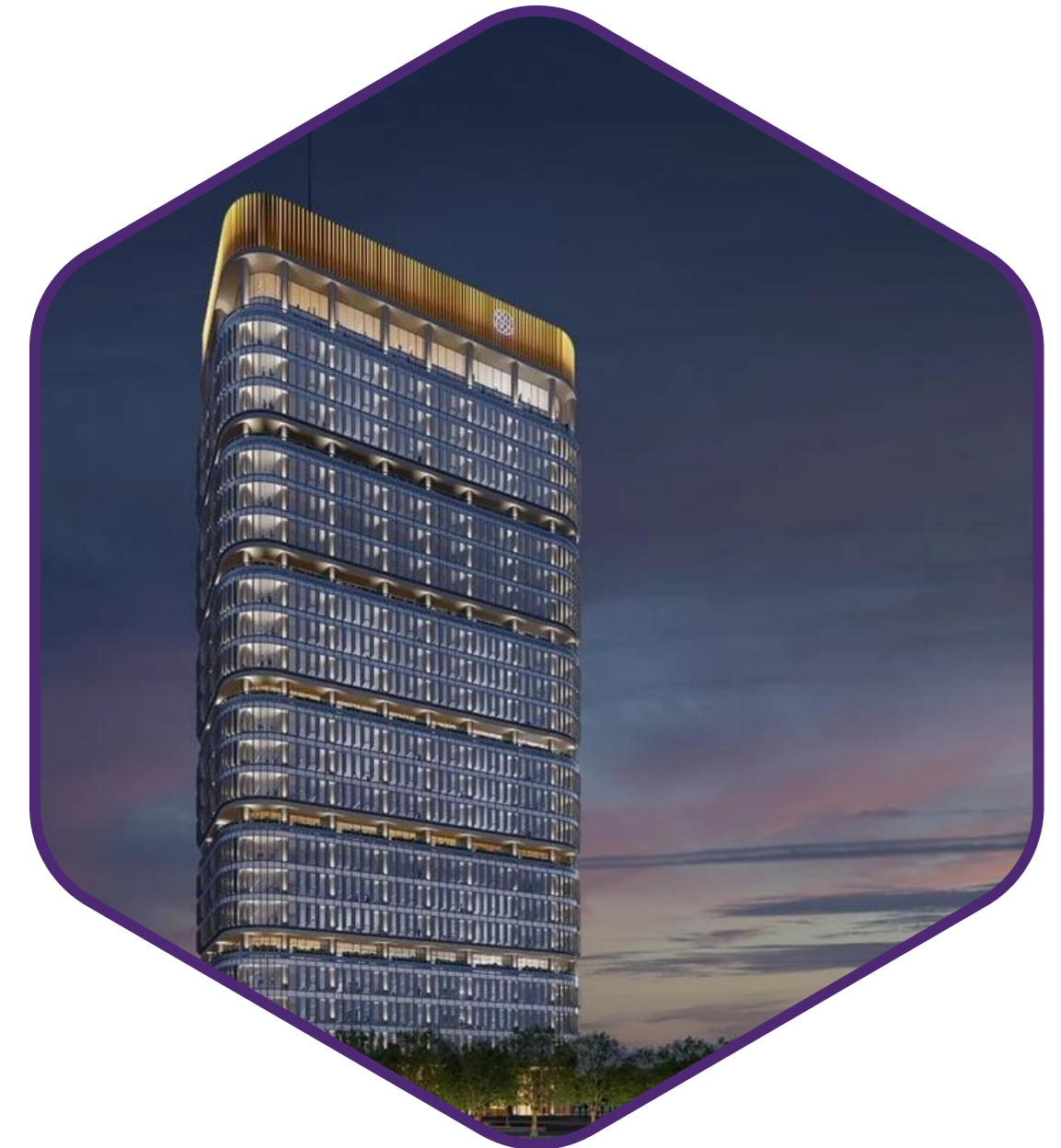
Malls, Commercial Buildings, Hotels, MLCP

Institutional Buildings

Healthcare, Institutional Buildings, Data Centre, Factory
Construction, Metro Stations etc.

Mixed Use Buildings

Mixed Use buildings, Townships, Gated Community etc



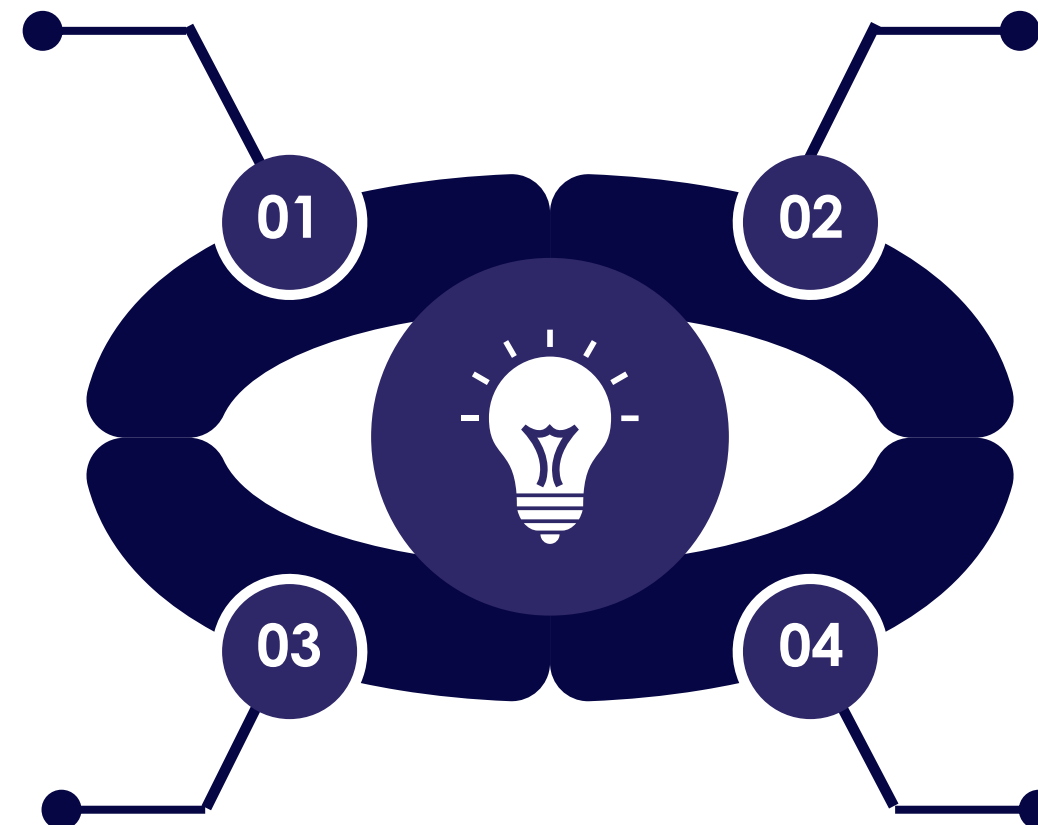


Revenue from Operations

Continue the growth momentum of 20%+ CAGR to surpass ₹ 4,000 crores benchmark of revenue in FY 2028

Margin

To further optimise our operational performance and maintain a healthy and industry leading EBIDTA margin profile in range of **16.5% - 17.5%** (including other income)



Working Capital

Reducing working capital requirement on absolute basis as well as in terms of number of days by accelerating debtors collection and reducing contract assets.

Debt Levels

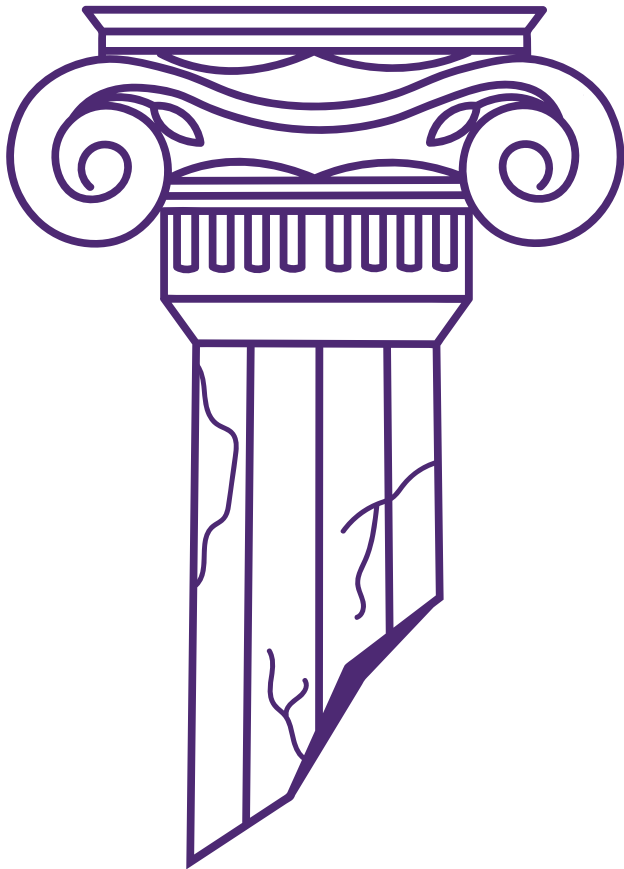
Reducing Gross debt and Net Debt level on account of reduction in working capital as well as monetizing of non core assets (**₹65 crore during FY 26**).

KEY STRENGTHS



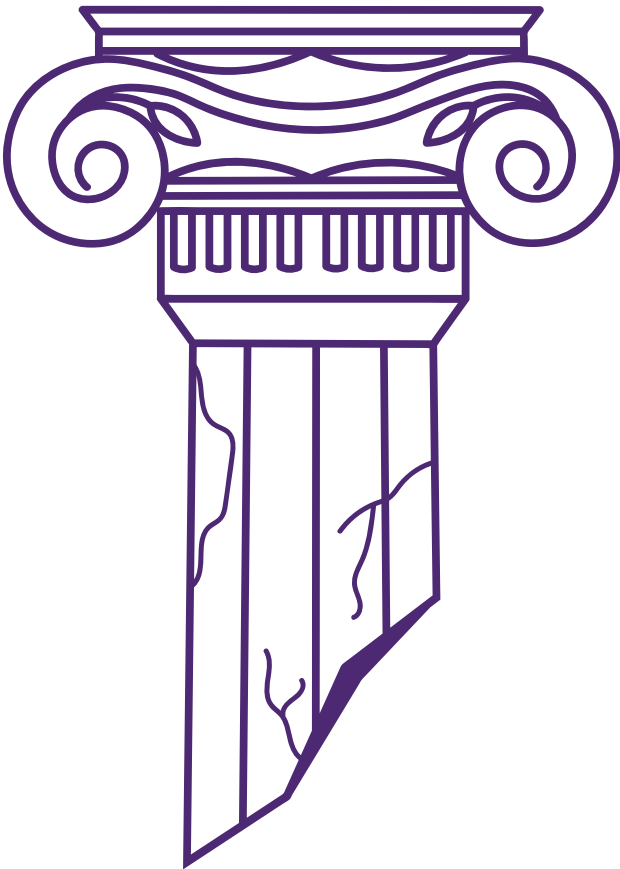
Track Record

Established presence and track record with focus on building construction



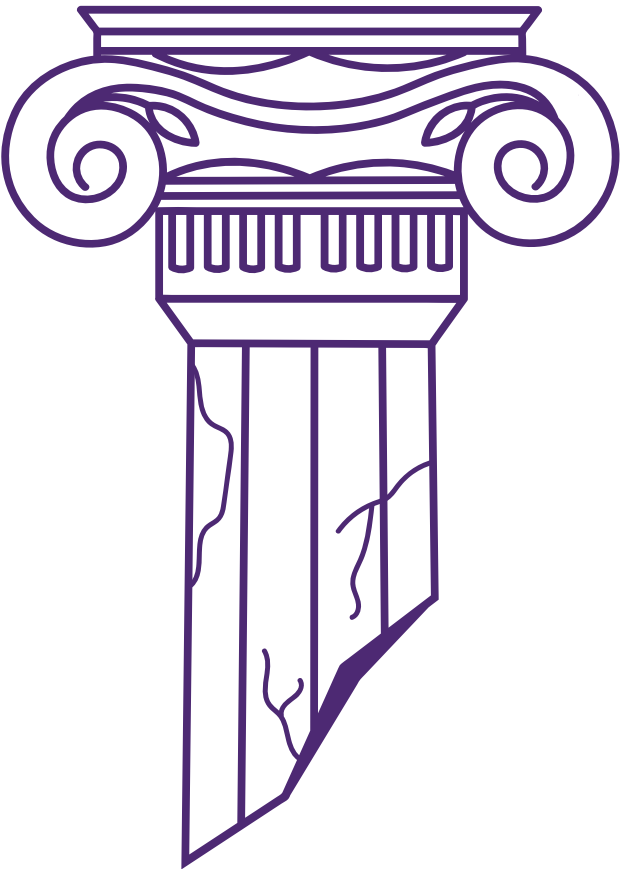
Order Book

Large order book with a marquee client base



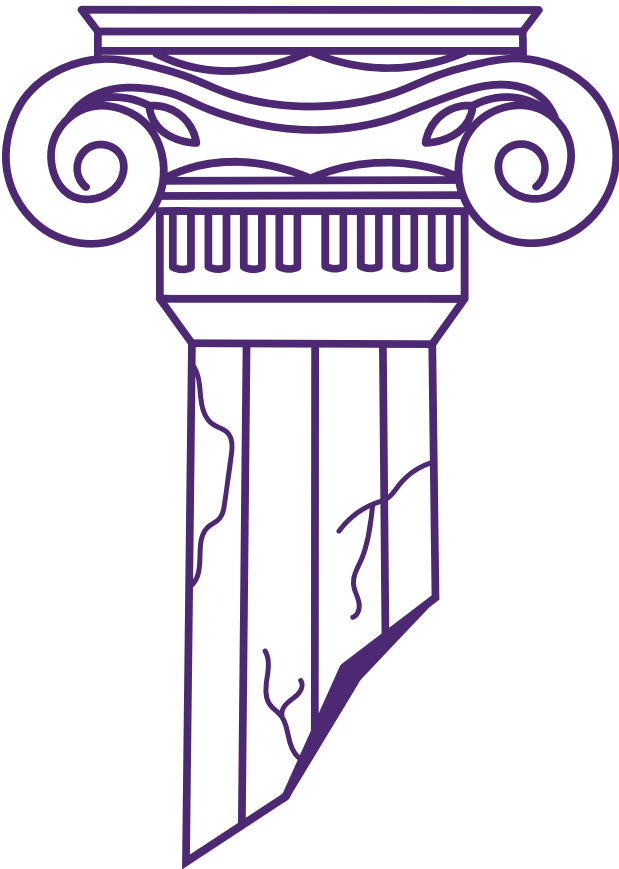
Execution Prowess

Diversified mix of projects across the building construction horizon



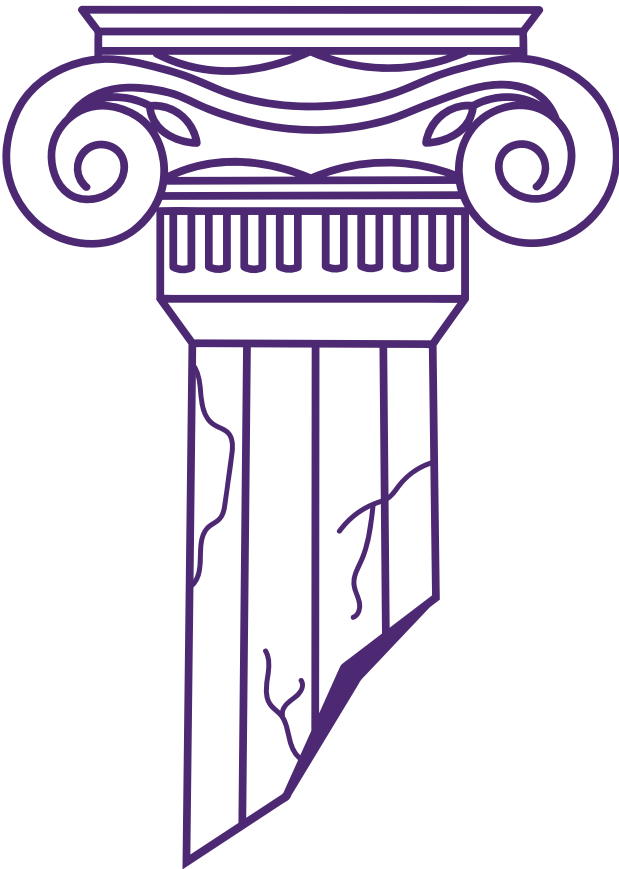
Strong Financial

Industry leading margin with focus on maintaining strong balance sheet



Experienced Team

Promoters extensive experience coupled with dedicated senior management team





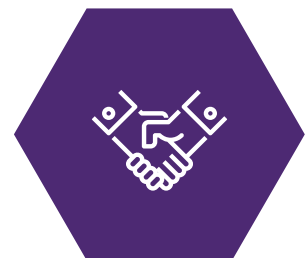
Focus on **Building & Factories** construction leading to professional and structured approach and streamlined processes



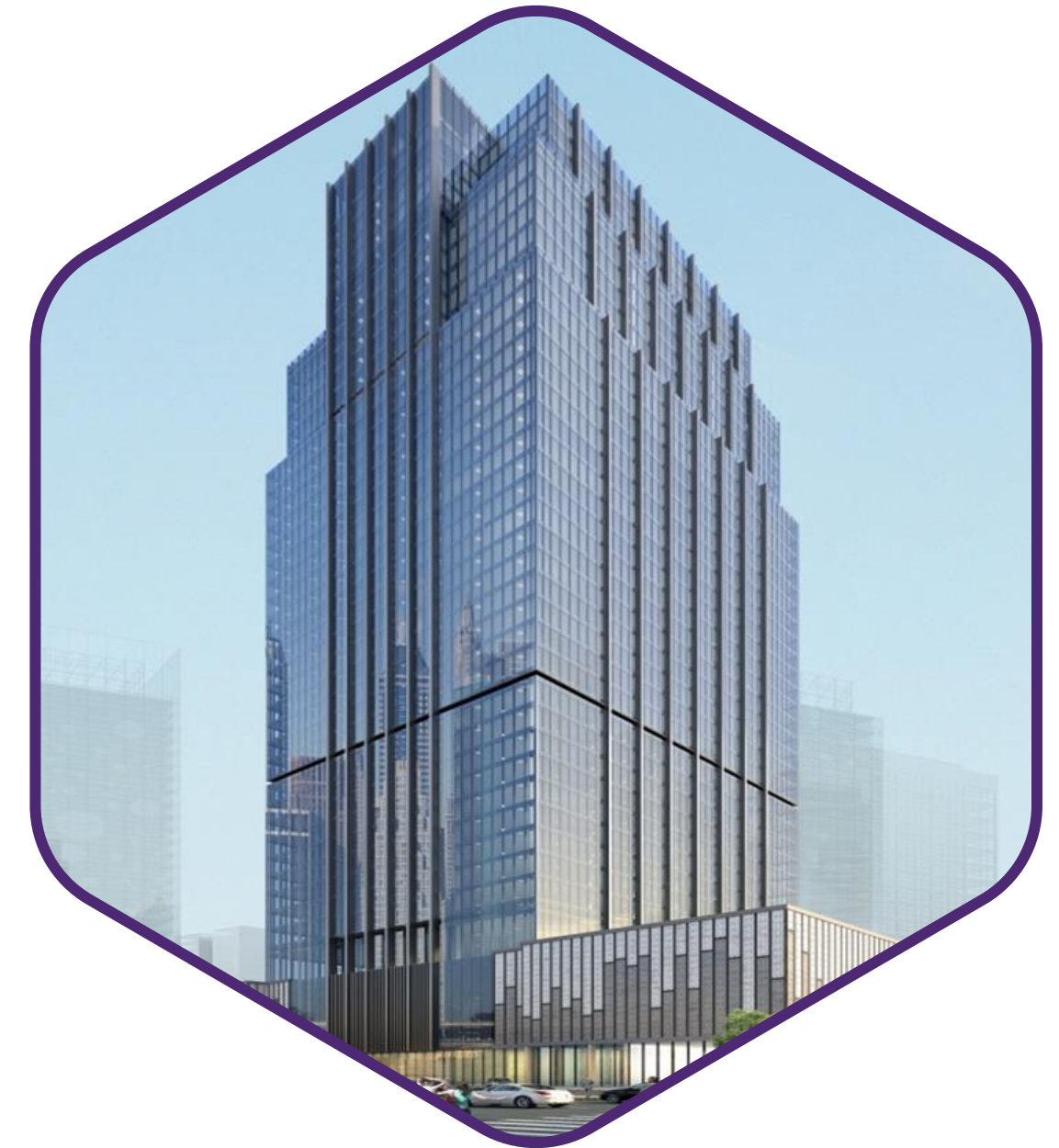
Track Record of successfully completing diverse projects spread across India in **MMR, PMR, NCR, Varanasi, Bengaluru, Chennai and Hyderabad** in the limited operational history of Company

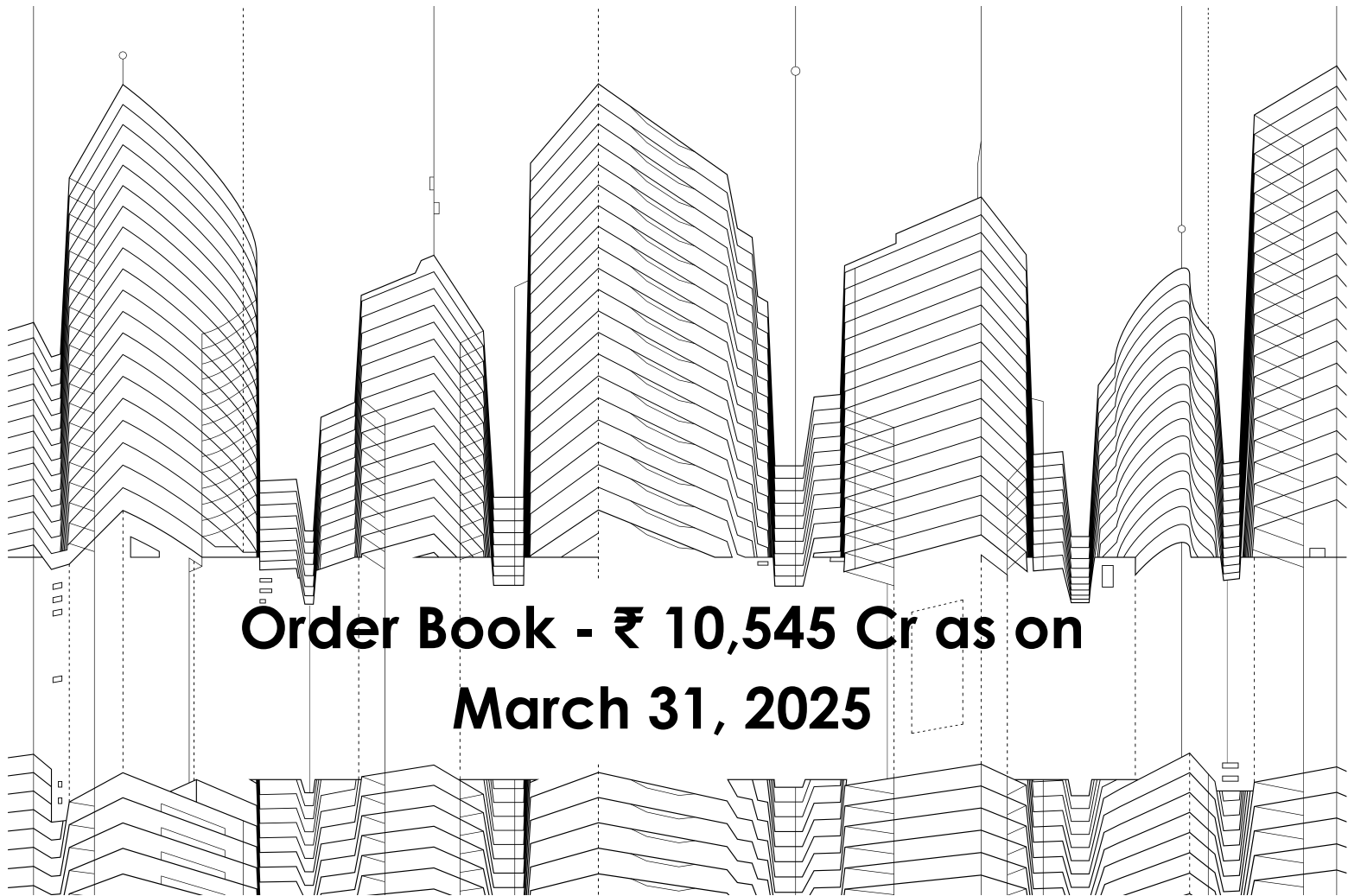


More than **70 mn sq ft** of constructed area across residential, commercial and other institutional buildings



Our demonstrated experience in developing large-scale projects provides us a crucial competitive advantage to meet the prequalification requirements for the competitive bidding process for large potential projects





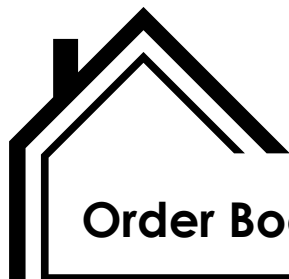
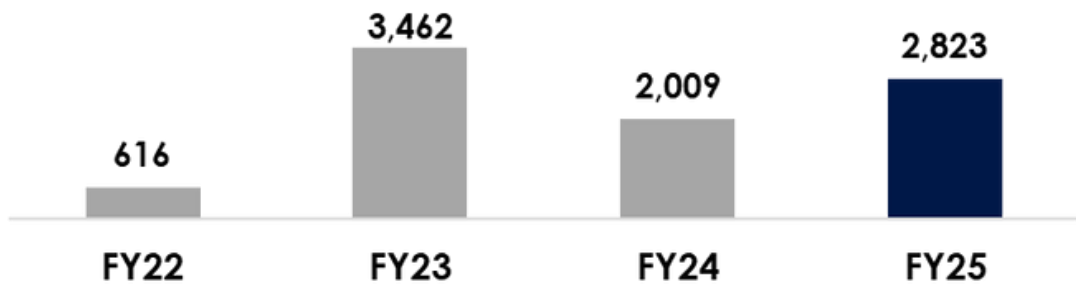
Order Book - ₹ 10,545 Cr as on March 31, 2025



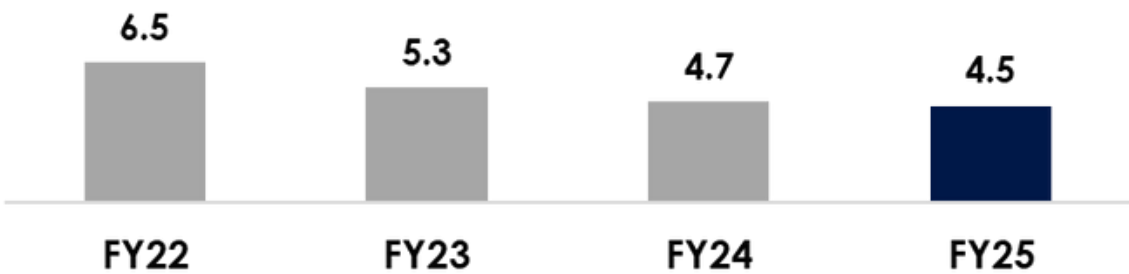
Order Backlog (₹ cr)



Order Inflow (₹ cr)



Order Book to Sales Ratio



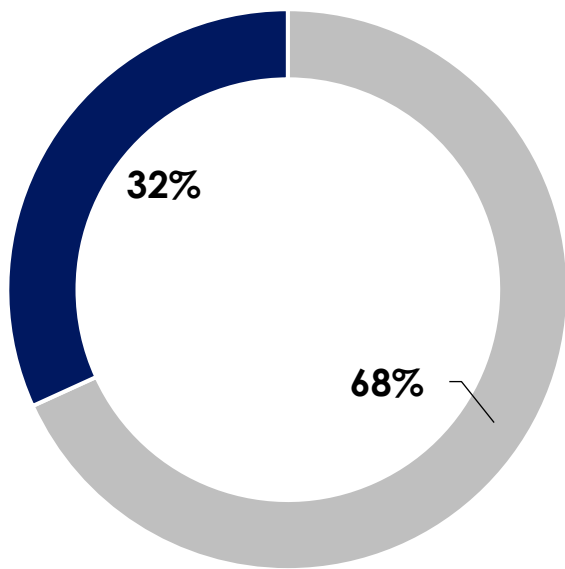
Order inflow during FY 25 - ₹ 2,823 crores



01



Private v/s Public

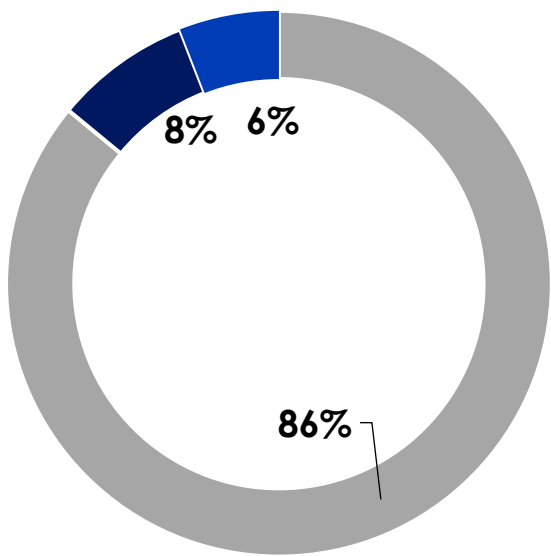


Public Private

02



Project Split

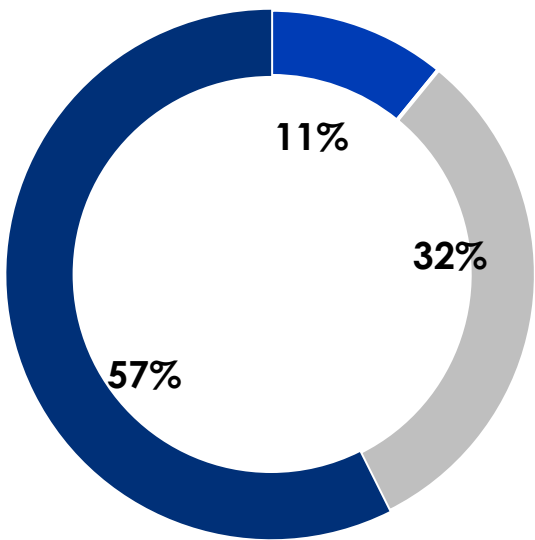


Highrise Other
Super Highrise

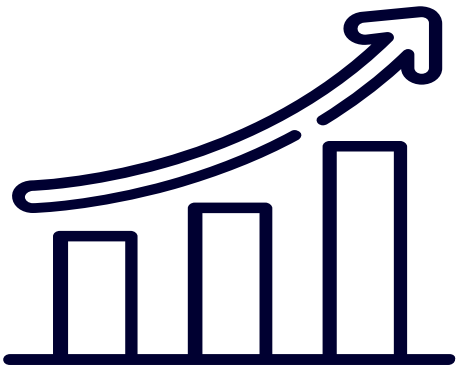
03



Category Split



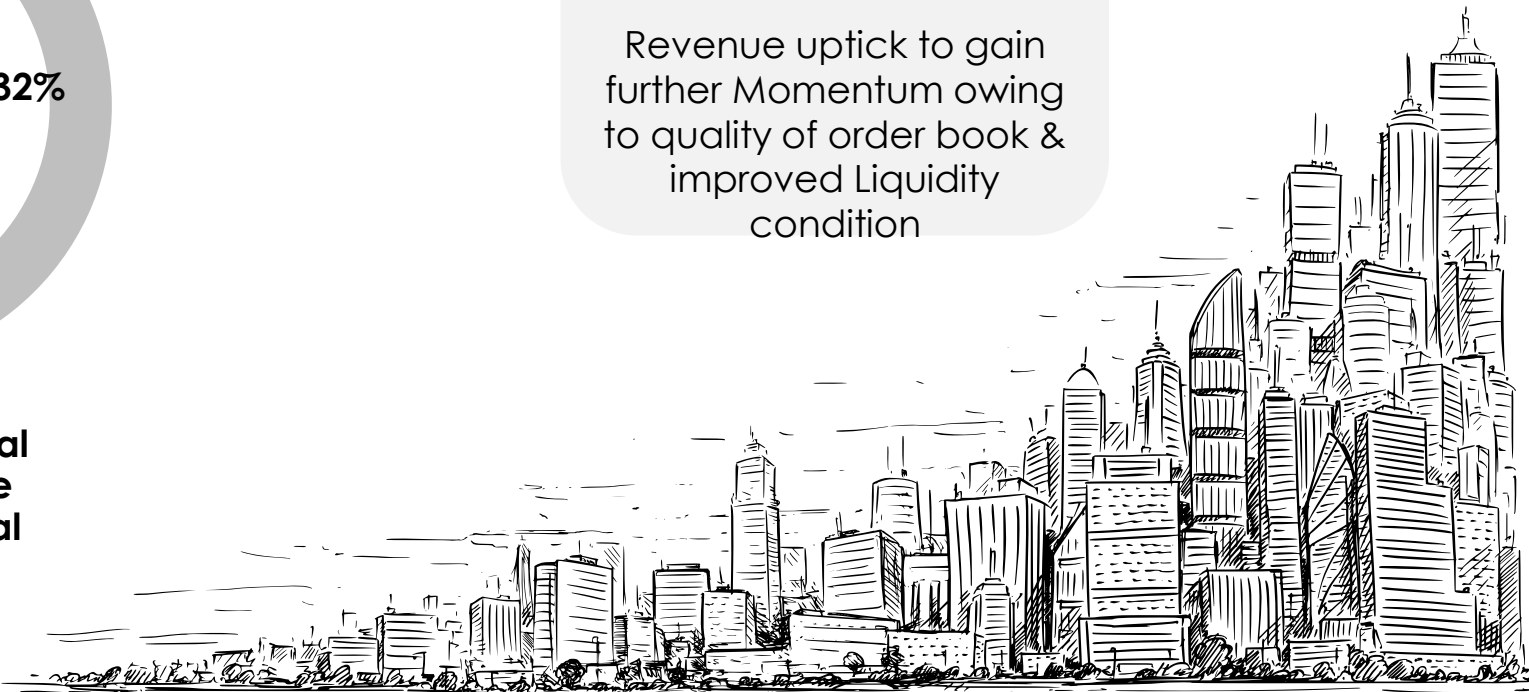
Institutional
Mixed Use
Residential



Revenue Uptick

Achieved a 22% Y-o-Y increase in turnover in FY25.

Revenue uptick to gain further Momentum owing to quality of order book & improved Liquidity condition

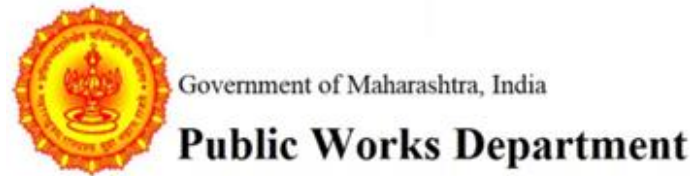


MARQUEE CLIENTS



CAPACITE

PUBLIC SECTOR



PRIVATE SECTOR



Brookfield



LODHA



TATA TRUSTS





Our concentrated focus on construction of buildings has also led to a high degree of specialization in this business



Our ability to execute projects, in a timely manner, using systems and processes that are aligned with the specific requirements of the building construction business, has enabled us to provide differentiated services in our area of operations.

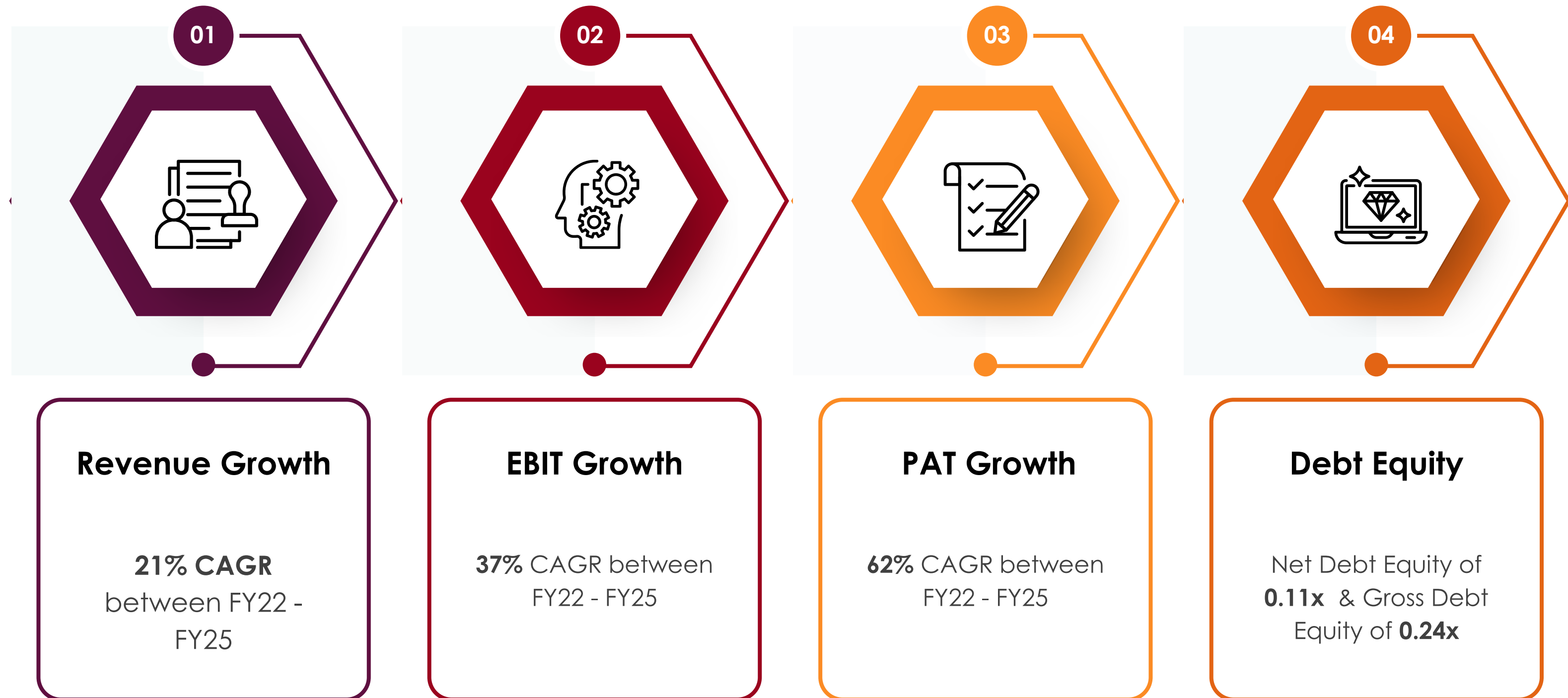


Our construction capabilities in concrete and composite steel structures augment our positioning as a building focused construction company.



Our ability and track record of delivering large-scale and complex projects with precision and expertise has positioned us to being a partner construction partner for large developers. We also offer MEP, finishing and interior services for the projects that we work on.





With strong financial alongside our execution prowess we are confident of setting up new performance benchmarks in the years to come



Rohit Katyal

Rohit Katyal, Executive Chairman, holds a bachelors' degree in commerce with specialization in financial accounting and auditing. He brings over 27 years of invaluable experience in the field of Civil Construction and Finance.

He currently leads the financial planning, budgeting and compliance function, ensuring adherence to the highest standards of governance and transparency.



Rahul Katyal

Rahul Katyal is MD & CEO of the Company. With a deep understanding of the construction industry and experience spanning over 25 years, he brings expertise in project management, budgeting, resource allocation & client relations, enabling the Company to deliver projects with excellence and efficiency.

He leads the Company's strategic planning, emphasizing growth, efficiency and sustainability.



Subir Malhotra

Subir Malhotra is Whole time Director of the Company. He holds a bachelor's degree in civil engineering (honours) from the BITS, Pilani. He has over 30 years of Industry experience.

He leads Business Development and Operations for the Company's Northern India operations, driving growth and efficiency in the region.

Supported by KMPs and SMP with years of hands on domain experience

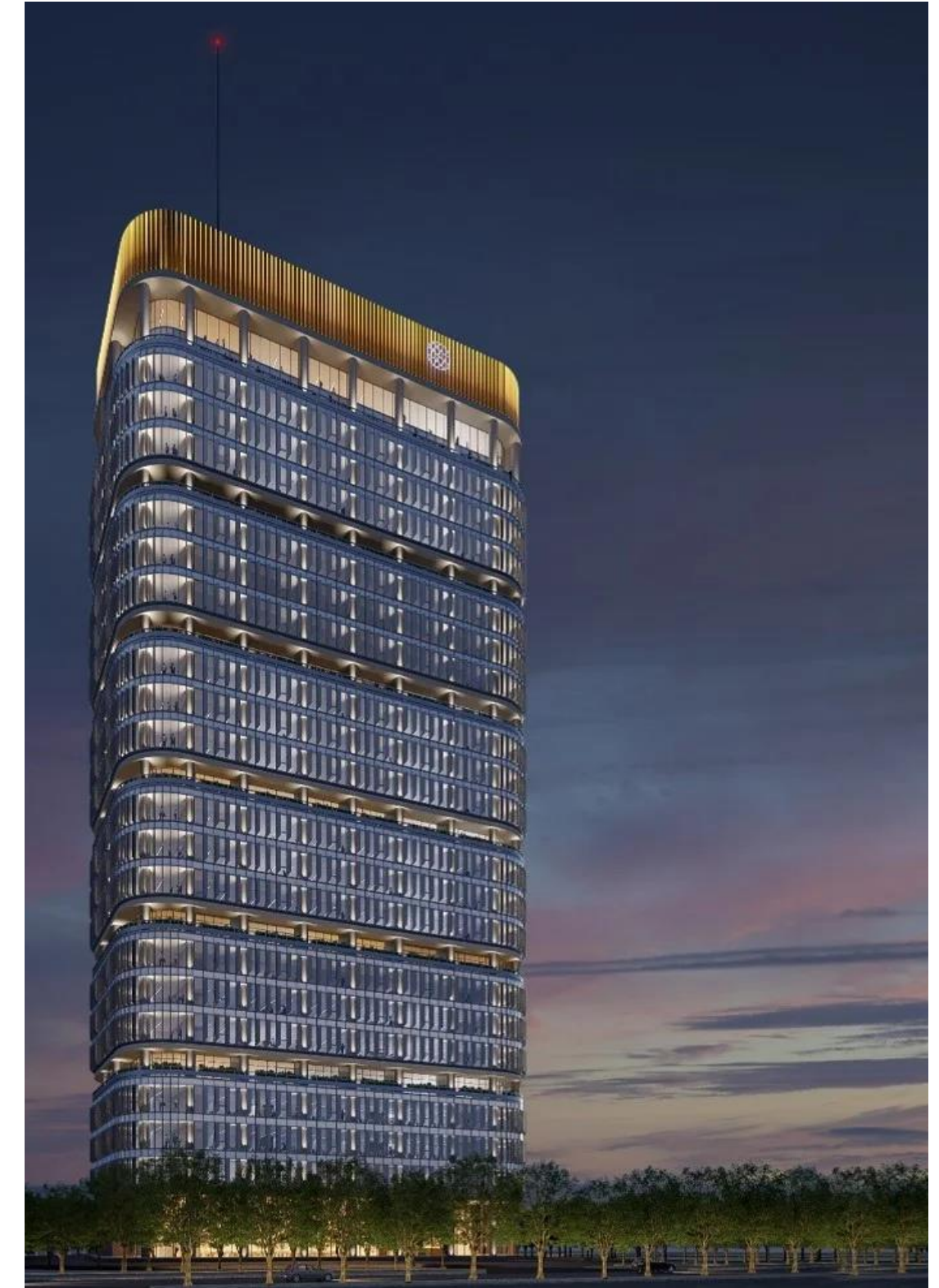


OUR CREATIONS













HISTORICAL FINANCIAL

CONSOLIDATED PROFIT & LOSS



Particulars (₹ In Crs)	FY22	FY23	FY24	FY25	CAGR
Revenue from Operations	1,340	1,799	1,932	2,350	21%
Other Income	13	10	32	58	
Total Income	1,353	1,808	1,964	2,407	
Cost of Material Consumed (Incl. Construction Expenses)	931	1213	1294	1621	
Employee Expenses	109	128	124	149	
Other Expenses	82	106	182	200	
EBITDA	232	361	363	437	24%
EBITDA Margin (%)	17.1%	20.0%	18.5%	18.2%	
Depreciation	99	136	101	95	
EBIT	133	225	262	342	37%
EBIT Margin (%)	9.8%	12.4%	13.3%	14.2%	
Finance Cost	67	89	96	93	
Share of Profit/(loss) of JV & Associates (net)	-1	0	1	17	
Profit before Tax	65	136	167	265	
Tax	17	41	47	61	
Profit After Tax	48	95	120	204	62%
PAT Margin (%)	3.5%	5.3%	6.1%	8.5%	
Cash PAT	148	240	229	285	
Cash PAT Margin (%)	10.9%	13.3%	11.7%	11.9%	



CONSOLIDATED BALANCE SHEET



ASSETS (₹ In Crs)	Mar'25	Mar'24	Mar'23
NON-CURRENT ASSETS	798	760	886
Property, plant & equipment	573	585	648
Capital work-in-progress	2	9	20
Intangible assets	2	1	1
Right-of-use assets	9	3	3
Investments Properties	0	4	7
Investment in joint venture	20	3	1
Trade receivables	60	86	97
Investments	2	0	0
Other Financial Assets	70	24	21
Non Current tax assets (Net)	1	1	25
Other Non - current assets	59	43	63
CURRENT ASSETS	2,702	2,389	1,726
Inventories	110	111	99
Contract Assets	1,150	1,229	924
Trade receivables	1,080	548	348
Cash & Cash Equivalents	64	19	29
Bank balances	30	190	146
Other Financial Assets	81	99	34
Other Current assets	122	148	147
Non-current assets held for sale	65	45	0
TOTAL ASSETS	3,500	3,149	2,612

EQUITY & LIABILITIES (₹ In Crs)	Mar'25	Mar'24	Mar'23
EQUITY	1,720	1,517	1,073
Equity Share capital	85	85	68
Other equity	1,634	1,432	1,006
Non-Controlling Interest	1	0	0
NON-CURRENT LIABILITIES	326	289	344
Contract Liability	75	56	132
Borrowings	149	124	112
Lease Liability	5	1	2
Other financial liabilities	49	44	44
Provisions	1	5	2
Deferred tax liabilities (Net)	46	60	53
CURRENT LIABILITIES	1,454	1,343	1,194
Contract Liability	172	246	179
Borrowings	268	202	258
Lease Liability	4	2	2
Trade Payables	896	818	634
Other Financial Liabilities	33	35	55
Provisions	9	6	5
Current Tax Liabilities (net)	51	18	9
Other current liabilities	22	16	53
TOTAL EQUITY & LIABILITIES	3,500	3,149	2,612

CONSOLIDATED CASHFLOW



Particulars (₹ In Cr)	FY 25	FY 24	FY 23
PBT	265	167	136
Adjustments	237	267	271
Operating profit before working capital changes	503	435	407
Changes in working capital	(409)	(467)	(301)
Cash generated from operations	94	(33)	105
Direct taxes paid (net of refund)	(42)	(6)	(17)
Net Cash from Operating Activities	52	(39)	88
Net Cash from Investing Activities	(9)	(152)	(48)
Net Cash from Financing Activities	2	182	(34)
Net Change in cash and cash equivalents	45	(10)	7
Opening Cash Balance	19	29	22
Closing Cash Balance	64	19	29



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