

May 26, 2025

The Manager
Listing Department
BSE Limited
Phirozee Jeejeebhoy Tower,
Dalal Street
Mumbai 400 001
BSE Scrip Code: 532395

The Manager
Listing Department
National Stock Exchange of India Limited
Exchange Plaza, 5 Floor, Plot C/1, G Block
Bandra – Kurla Complex, Bandra(E),
Mumbai 400 051
NSE Symbol: AXISCADES

Dear Sir/Madam,

Sub: Q4 FY25 Result Presentation

Please find attached the consolidated results presentation for the quarter and year ended March 31, 2025, of AXISCADES Technologies Limited (AXISCADES).

This presentation is the information for shareholders on the performance of the Company for the quarter and year ended March 31, 2025.

Kindly upload presentation to the terminals.

Yours faithfully,

For **AXISCADES Technologies Limited**

Sonal Dudani
Company Secretary & Compliance Officer

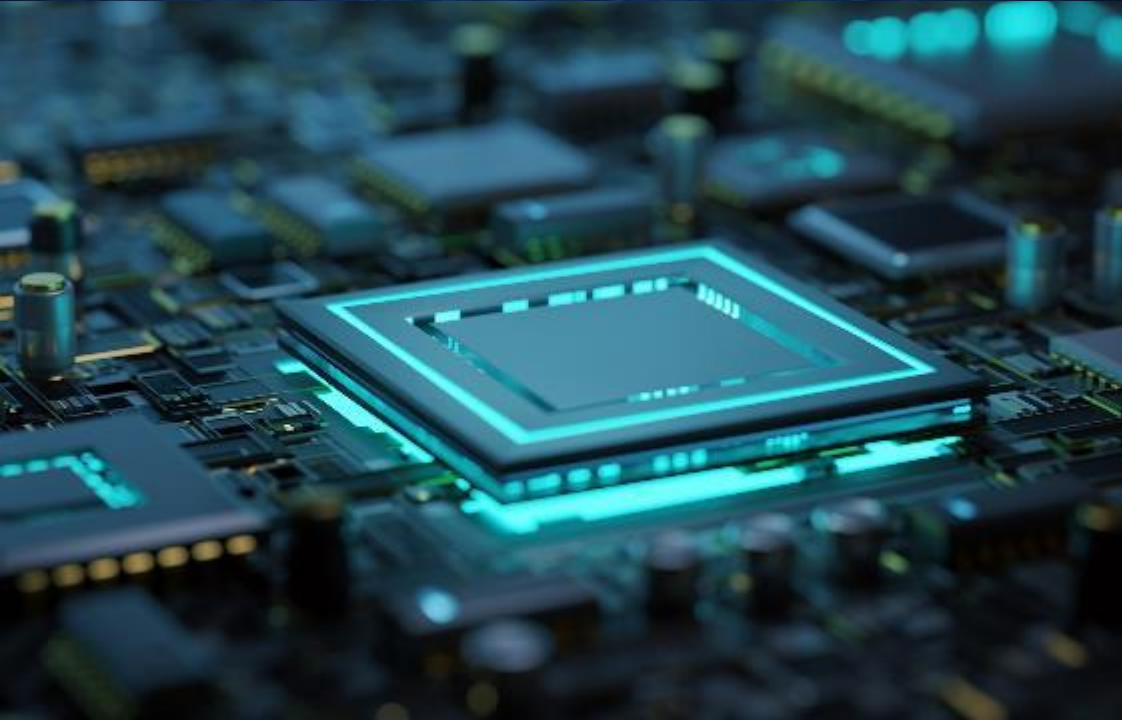
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AXISCADES Technologies Limited

(formerly AXISCADES Engineering Technologies Limited)

CIN No.: L72200KA1990PLC084435

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AXISCADES TECHNOLOGIES LIMITED

Q4 & FY25

EARNINGS PRESENTATION

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“ My first tenure in the company, between 2008-2012, saw accelerated growth, averaging 60% CAGR. In this period, we established ourselves as Pioneers and Leaders in Aerospace and Defence, by winning and executing prestigious contracts, such as, Airbus Design and COE, Mirage 2000 Upgrade program etc. After over a decade of hiatus, I am back as Chairman and Chief Mentor of the company, which I established, with the principal objective to bring about Year- on- Year **‘Step Growth’** in Revenue and Margins, and at the same time, achieve Leadership Position in our core areas, namely, Defence, Aerospace and ESAI.

To realize our goal of achieving sustainable ‘step growth’, the first requirement is to have a proven and committed leadership team, sharing a common vision. Towards this, I have brought back key members of the Leadership Team, who helped me to build this company and who are passionate to achieve this Growth. By end of Q1 FY26, this core leadership team will be in place.

Then we set ourselves one goal: Achieve a revenue of 9,000 Cr (\$1billion), by 2030 - **‘Power 930’**. And do this @ minimum 24% EBITDA. This goal can only be achieved by climbing up the value chain; offering manufacturing and maintenance solutions and developing and selling innovative products. In other words, we need to invert the current Services to Product/Solution ratio of 80:20 to 20:80.

This requires infrastructure, facilities and skill development. We planned Devanahalli Atmanirbhar Complex (DAC), spread over 20 acres, with the aim to create a world class and one of India’s finest facilities for Manufacturing, Testing and Repair of, Strategic Electronic Systems, Radars, Unmanned Systems, and Aircraft Components. This investment will be made progressively over the next 3 years. Also, we have a plan to create state of art Missile integration facility in Hyderabad. Phase I of DAC is under plan approval stage and is scheduled to be commissioned in 2nd half of FY26.

We have entrusted Muralikrishnan, COO to drive **Power 930** initiatives. Mohanakrishnan, our Deputy CEO will focus on climbing up the value chain in Aerospace. Anurag Sharma, Chief Growth Officer will take over ESAI with a goal of developing and delivering disruptive products. Sharadhi Babu, President - Defence will ensure that we secure high value contracts and prestigious OEM deals. Ravi Joghee, Chief Strategy and Marketing Officer, is entrusted with recalibrating our non core businesses. Alfonso Martinez, CEO who has already been part of \$billion revenue in his last two stints, will oversee the implementation of all the above, while ensuring the achievement of annual operating plans.

With this, why not? We have a moonshot at my dream: \$1billion in revenue by 2030. ”

Message from
Dr. Sampath Ravinarayanan
Chairman



“ In my first year as a CEO of AXISCADES, I am pleased to report in FY25, an 8% increase in revenue and 17% increase in adjusted EBITDA over the previous year. Our revenue stood at ₹1,031Cr and adjusted EBITDA stood at ₹156Cr, adjusted for one off expenses incurred in FY25. With this, we have crossed the milestone of ₹1,000Cr in revenues. Our profit after tax (PAT) at ₹75Cr / 7.2% has seen a two-fold rise in both absolute numbers and margin, with consequent doubling of EPS. This is in furtherance of our commitment to maximize shareholder value. Also, in our core verticals of Aerospace, Defense and ESAI, our revenues grew 12% YoY and EBITDA grew by 15%, both in absolute numbers.

Reflecting upon Q4'25 that has gone by, which is also my first quarter, I feel confident on the company's strengths and potential for future growth, in the verticals we serve, and we are committed to offering complex and innovative solutions to our clients.

As we approach FY26, our priority is to capitalize on the opportunities in emerging sectors like manufacturing, MRO, chip-to-product and advanced defense technologies, including unmanned warfare, to bring about non-linear, product led, scalable growth. The company plans to invest significantly in developing new proof of concept and products, with a focus on creating commercially viable assets for future revenue. Our FY26 goals reflect our ongoing commitment to a strategic approach that aims for substantial growth in shareholder and stakeholder value. ”

Message from **Mr. Alfonso Martinez**

CEO & MD



Message from our Presidents



KP Mohanakrishnan
Dy. CEO and President – Aerospace



To complement our Group's ambition of achieving a \$1Bn turnover by 2030, I am embarking on a focused initiative to build a parallel \$1Bn business pipeline in the Aerospace sector. This growth will be driven by strategically expanding our existing engineering services portfolio and creating an integrated suite of aerospace manufacturing solutions. My approach includes:

- Deepening Engineering Services:** Enhancing high-value engineering capabilities to support global OEMs and Tier-1 suppliers.
- Building Manufacturing Solutions:** Establishing advanced Tool Manufacturing, MRO facilities, and Speed Shops to address both legacy and next-gen aerospace platforms.
- Forging Global Partnerships:** Collaborating with leading players across geographies to gain market access, transfer technology, and ensure rapid scalability.
- Investing in World-Class Infrastructure:** Developing cutting-edge facilities to meet global standards of quality, safety, and operational excellence.
- Implementing Scalable Systems & Processes:** Establishing digital-first, process-driven systems to support predictable delivery, cost control, and consistent quality.

This Aerospace pipeline will not only diversify and de-risk our portfolio but also position us as a formidable global player in high-value, technology-driven manufacturing. With the right strategic focus and disciplined execution, this initiative will be a key pillar in achieving **Power 930**.



D Muralikrishnan
Chief Operating Officer



Continuing the visionary path laid out by our Chairman—to transform our company from a services-led organization into a product-centric powerhouse and achieve the \$1 Billion milestone — I am committed, as COO, to drive this transformation, by focused execution in three critical fronts:

Empowering Our Leadership: I am prioritizing the enablement of our Presidents by equipping them with the right resources, organizational structure, and decision-making framework. This is essential to realize our Annual Operating Plan (AOP) targets and accelerate our journey toward scalable and sustainable growth.

Power 930 Initiative: I am personally leading the Power 930 initiative—a bold and ambitious program aimed at achieving by 2030, revenues of ₹ 9,000 Cr. Beyond the numbers, this initiative represents a bold organizational transformation—driven by deep internal and external collaboration, and the speed and agility with which we execute.

World-Class Infrastructure: We are investing in state-of-the-art facilities that span the entire value chain—from design and development to manufacturing, assembly, integration, testing, qualification, and MRO. These capabilities will serve as a backbone for delivering high-value, globally competitive solutions.

In this mission, I will closely work with my colleague and partner in transformation, Mr. Ravikumar Joghee, our Chief Strategy & Marketing Officer. Together, we are aligning strategy with execution to ensure that every initiative contributes to our long-term vision, to move forward with passion, purpose and precision

Message from our Presidents



Sharadhi Chandra Babu
President – Defence



My goal is to elevate AXISCADES Defence narrative by embarking on a journey towards product driven growth and innovative solutions with focus on ToTs, DcPP of Radar Systems, Seekers, Sonars and Onboard land, Air and Naval systems - Assembly, Integration and Maintenance. This will deliver integrated electronic systems including integration of software, hardware, mechanical systems, testing, maintenance etc.

With our continued thrust on the Missile Systems and Missile Launchers - assembly, integration, maintenance, repair, upgrade etc, we have earmarked a dedicated Missile Atmanirbhar Complex at Hyderabad.

In the Strategic Electronic Warfare systems comprising multiple sensor and neutralization technologies - Radar, RF Monitoring and Counter Measure Systems, we are aiming to be one of the top 3 providers. We will continue to focus and invest in the Development/Manufacture of Unmanned Warfare Systems for Land, Air and Water, comprising Weaponized Drones, Kinetics & Kamikaze Drones, Loitering Munitions and Hovercrafts to claim the pole position.

We will leverage DAC to establish AXISCADES as a key player in Atmanirbhar Bharat and make a compelling case as a first choice partner to Global OEMs for offset engagements and indigenization.

We will continue to expand in existing market strong holds like Europe and strategically acquire more customers in the US apart from India. Defence Products like Radar, Sonar, Testing Systems, Unmanned Systems, MRO etc shall be marketed for global business.



Anurag Sharma
President - ESAI + CEO – add solution
GmbH



Electronics and Semiconductors are leading growth horizontals across global industry spectrum, where innovative products are being developed and launched with speed and agility. This segment with AI based computing at centerstage is bringing astonishing levels of growth with smart products being churned out for every industry.

As a Leader of ESAI verticals , I am committed to usher AXISCADES group into the heart of this product driven growth. I am building multiple accelerators in ESAI keeping in mind our progressive transformation from 80/20 share in services/products, to 20/80 by FY28.

I am working towards developing and delivering disruptive products and building market readiness, with the objective of being the top player in the respective market segments, for achieving Power 930 initiative envisioned by our Chairman.

We will leverage our best-in-class product development and testing teams, lean and agile manufacturing ecosystem being developed in our DAC, while establishing an expansive network of component suppliers and product resellers.

My experience of being always on top of market intelligence and understanding the pulse of consumer electronics, healthcare and industrial segments will help us to develop disruptive products, which will create new market demand, as against catering to specific utility needs.



| Core Domains - Focus on Non linear, Global and Scalable Growth | | | | |
|--|------------|-------------|--------------|--------------|
| FY25 INR Cr | Revenue | EBITDA | EBITDA % | FTE |
| Aerospace | 322 | 68 | 21.2% | 1,106 |
| Defence | 303 | 45 | 15.0% | 366 |
| ESAI | 125 | 30 | 23.9% | 167 |
| Total | 749 | 143 | 19.1% | 1,639 |
| % of total | 73% | 101% | | |



| Non Core Domains - Focus on Business Reset & Profitability | | | | |
|--|------------|------------|--------------|------------|
| FY25 INR Cr | Revenue | EBITDA | EBITDA % | FTE |
| HE & Auto | 238 | -9 | -3.6% | 833 |
| Energy | 43 | 8 | 17.4% | 166 |
| Total | 282 | -1 | -0.3% | 999 |
| % of total | 27% | -1% | | |



| Total | |
|-----------------|--------------|
| FY25 INR Cr | Revenue |
| Revenue | 1,031 |
| EBITDA | 142 |
| EBITDA % | 13.8% |
| FTE | 2,891 |

Rationale

- Core Domains: 73% of revenue contributed to the full extent of reported EBITDA of **₹142 crores**
- Non-Core Domains: 27% of revenue yielded negative EBITDA margins for the full year
- Our core business margins expanded 50bps YoY. Non-core margins shrunk ~450bps.

Outlook

- Core Domains : Achieve significant expansion, targeting at least 20% revenue growth and 50% EBITDA growth YoY
- Non-Core Domains : Identify synergies between core and non-core in emerging areas through ESAI and recalibrate the business towards profitability

Key Highlights - Q4 FY25

Business Highlights



Year-over-year revenues from the Core Domains increased by **↑ 12%**, primarily fueled by the Defense and Aerospace sectors

ESAI revenue saw increase of **↑ 64%** year-over-year while Defense revenue experienced a **↑ 7%** year-over-year growth.

Aerospace revenues held steady year-over-year but showed slight sequential decline due to a timing of delivery in certain programs

The Non-Core Domains, which includes Heavy Engineering, Automotive, and Energy, continued to experience a decline of -12%, attributed to slowdown in the automotive sector and the timing of orders in Energy

3% QoQ improvement in Revenue per Employee metric driven by operational optimization across the board



Financial Highlights

Revenue from Operations reached ₹268 crores for the quarter, reflecting a growth of **↑ 4.8%** year-over-year (YoY) and a decline of 2.4% quarter-over-quarter (QoQ)

In dollar terms, revenue for the quarter amounted to \$31.4 million, remained flat YoY and a QoQ decline of -4.3%

The Adjusted EBITDA for the quarter was ₹45 crores (Reported EBITDA ₹37 crores), representing an increase of 5.5% over the previous Quarter and increase of **↑ 38.3%** YoY

Adjusted EBITDA margins was at 16.8% (Reported EBITDA margins of 14.0%), compared to 15.5% in Q3 FY25 and 12.7% in Q4 FY24.

Profit After Tax (PAT) was ₹31.5 crores, with a PAT margin of 11.6% for the quarter, compared to ₹14.8 crores / 5.3% in Q3 FY25 and ₹9.0 crores / 3.4% in Q4 FY24

Key Highlights - FY25

Business Highlights



Revenue from the Core Domains increased by **↑ 12%** year-over-year, primarily fueled by the Defense and Aerospace sectors

Defense revenue experienced a substantial growth of 16%, while Aerospace recorded a **↑ 13%** increase.

EBITDA rose by **↑ 13%** in Defense and 20% in Aerospace, consistent with our narrative of Core versus Non-core domain

The Non-core Domains faced a decline of -3%, influenced by macroeconomic factors in the automotive industry & shifts in customer priorities within Heavy Engineering, though this was somewhat mitigated by growth in the energy sector

Our consolidated Revenue per Employee metric grew by 18% YoY



Financial Highlights



Revenue from Operations of ₹1,031 crores for the year grew by **↑ 7.9%** YoY

Revenue in \$ terms for the year stood at \$ 122.7 Mn; grew by **↑ 5.7%** YoY

Adjusted EBITDA for the year stood at ₹156 crores (Reported EBITDA of ₹142 crores); as compared to FY24 at ₹133 crores, grew by **↑ 17.1%** YoY

Adjusted EBITDA Margins stood at 15.1% (Reported EBITDA Margins 13.8%); as against 14.0% in FY24

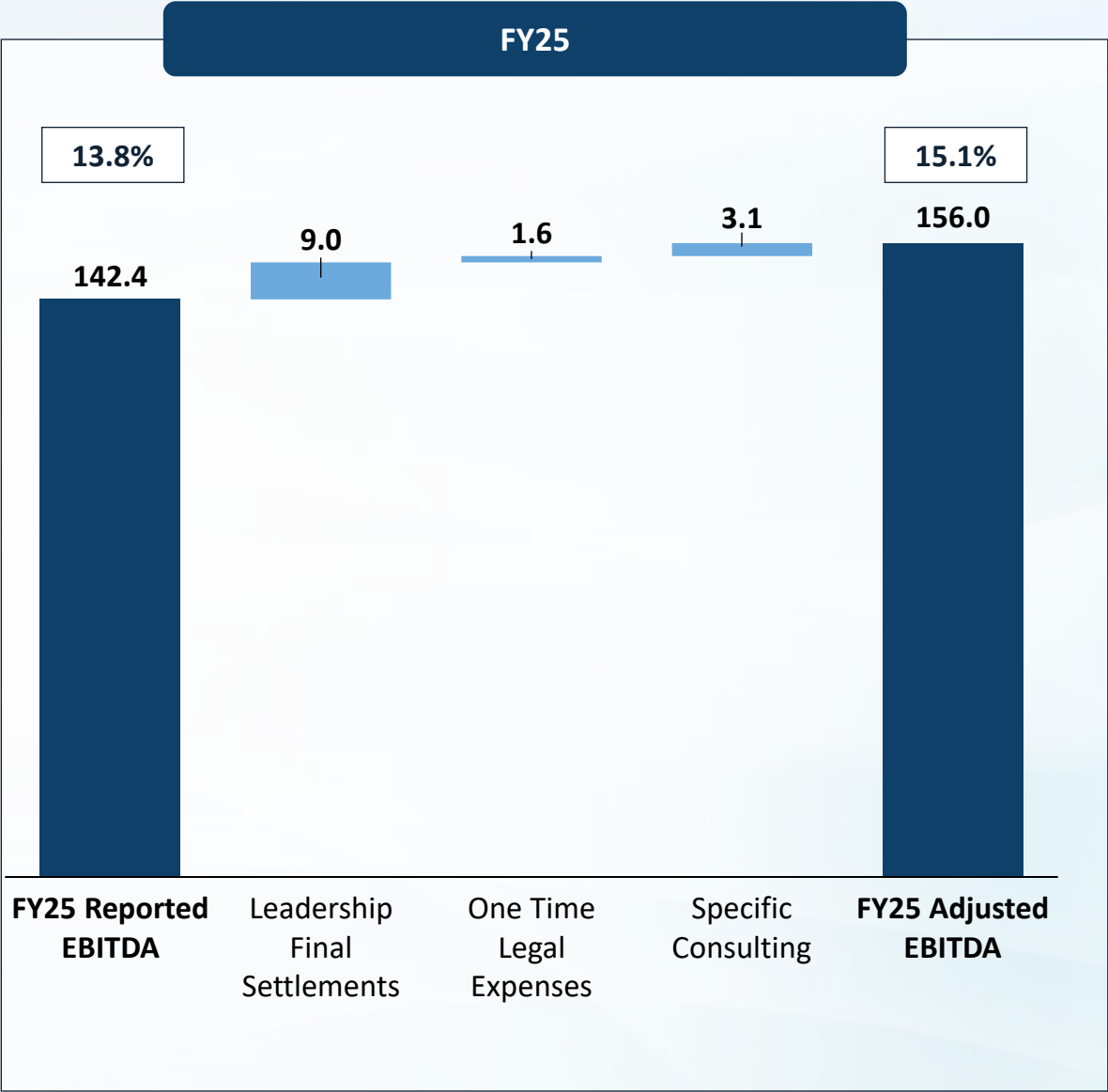
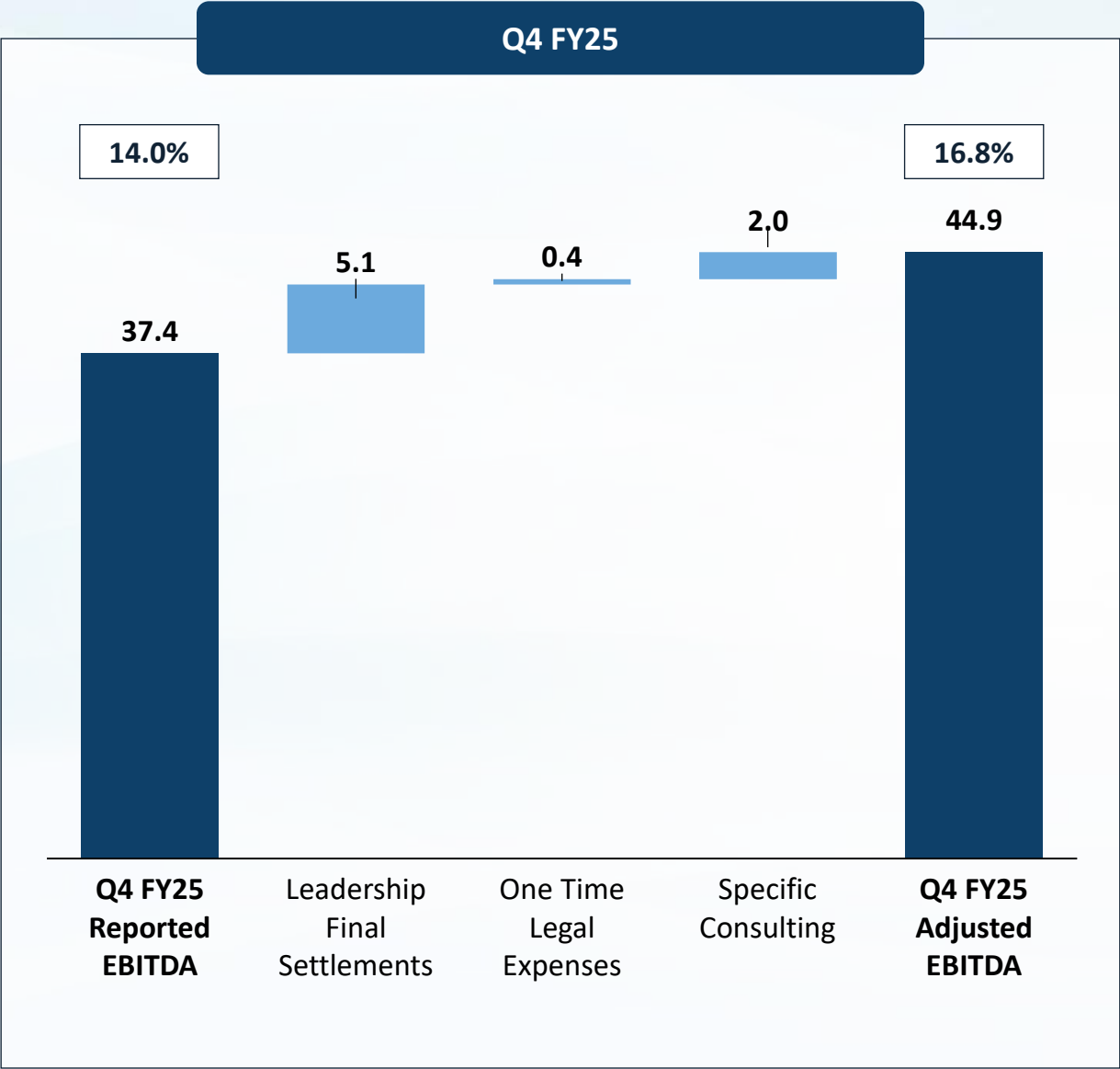
PAT stood at ₹75.3 crores with PAT margin of 7.2 % for the year, as against ₹ 33.4 crores / 3.5% in FY24

Diluted EPS doubled in FY25 with 122.5% growth YoY ending at ₹17.2 from ₹7.7 in FY24




Adjusted EBITDA - Q4 & FY25 (adjusted for non recurring expenses)







All numbers in INR crores



Consolidated Financial Performance – Q4 FY25

| All numbers in INR crores | Q4FY24 | Q3FY25 | Q4FY25 | YoY | QoQ |
|--|-------------|-------------|-------------|---------|---------|
|  Revenue from Operations | 256 | 275 | 268 | +4.8% | -2.4% |
|  Adj EBITDA & Adj EBITDA margin | 32 12.7% | 43 15.5% | 45 16.8% | +38.3% | +5.5% |
|  PAT & PAT margin | 9 3.4% | 15 5.3% | 31 11.6% | +250.1% | +113.0% |

Consolidated Financial Performance - FY25

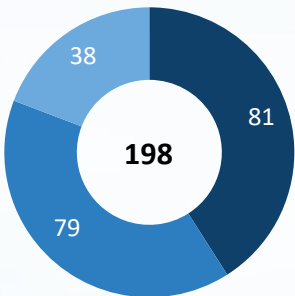
| All numbers in INR crores | FY24 | FY25 | YoY |
|--|--------------|--------------|---------|
|  Revenue from Operations | 955 | 1,031 | +7.9% |
|  Adj EBITDA & Adj EBITDA margin | 133 14.0% | 156 15.1% | +17.1% |
|  PAT & PAT margin | 33 3.5% | 75 7.2% | +125.3% |
|  Diluted EPS | 7.7 | 17.2 | +122.5% |

Core Domains

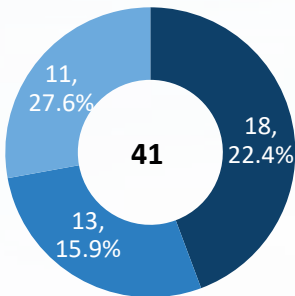
Non-core Domains

Q4FY25

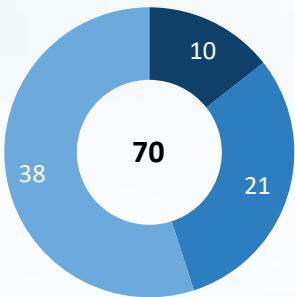
Revenue (₹)



EBITDA (₹, %)



Aerospace Defence ESAI

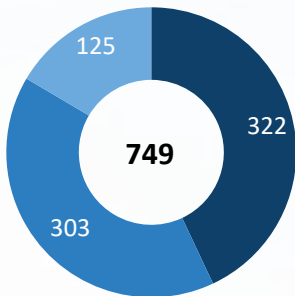


Energy Automotive Heavy Engineering

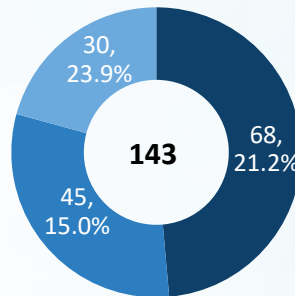
| (INR cr) | EBITDA | % |
|-------------------|--------|-------|
| Energy | 1 | 9.0% |
| Automotive | -1 | -4.2% |
| Heavy Engineering | -4 | -9.9% |

FY25

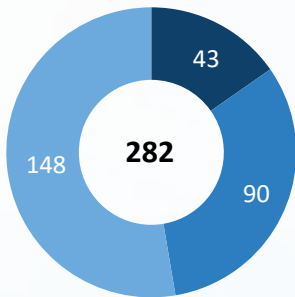
Revenue



EBITDA (₹, %)



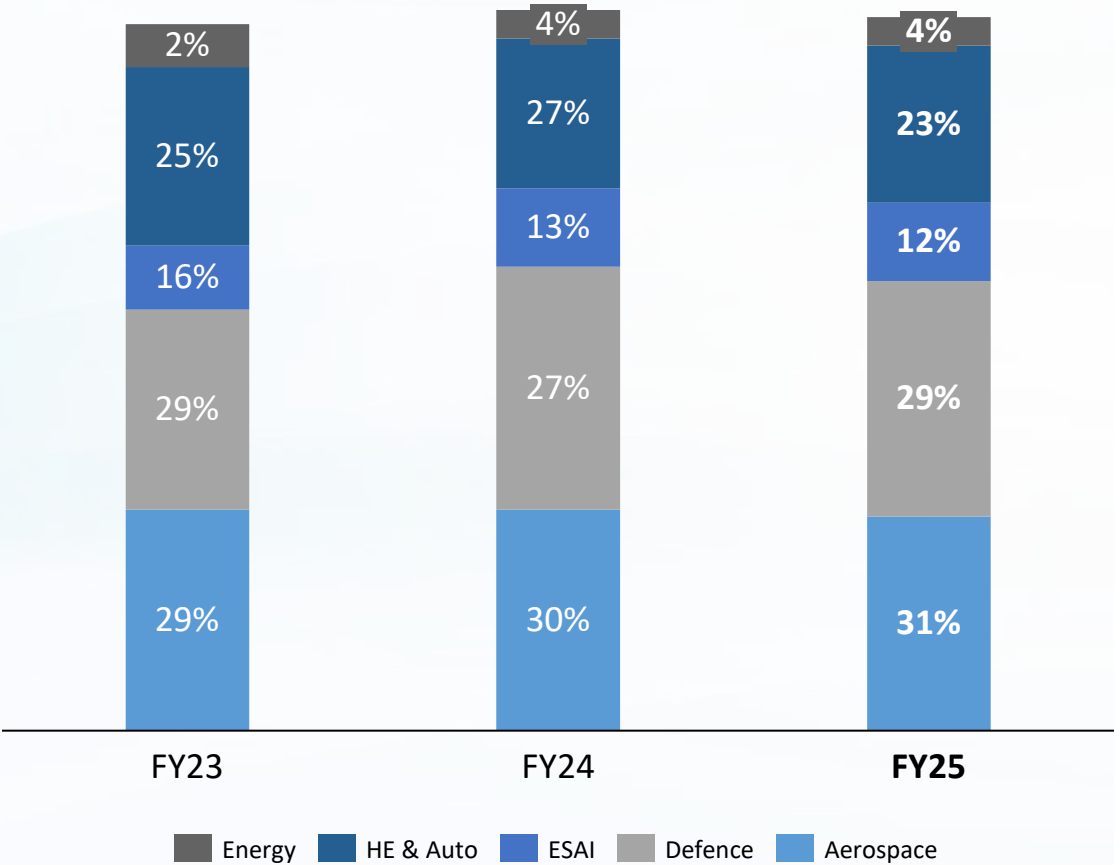
Aerospace Defence ESAI



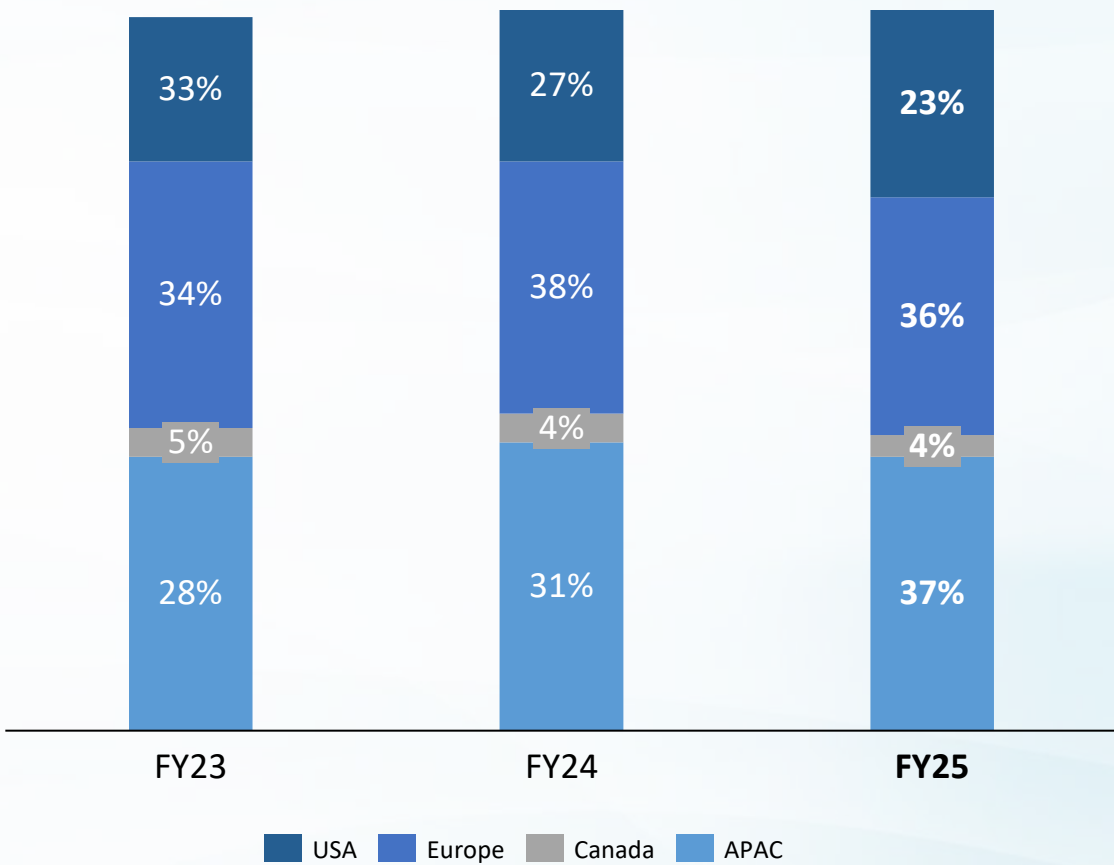
Energy Automotive Heavy Engineering

| (INR cr) | EBITDA | % |
|-------------------|--------|-------|
| Energy | 8 | 17.4% |
| Automotive | -2 | -2.6% |
| Heavy Engineering | -6 | -4.2% |

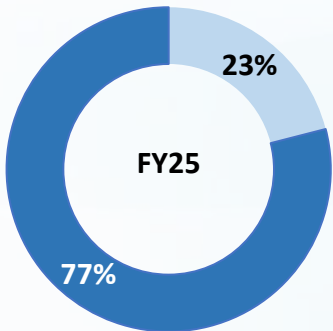
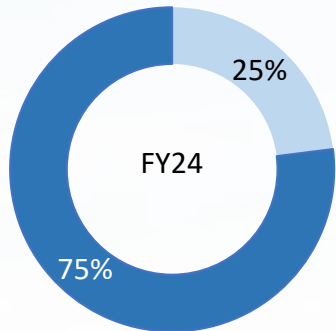
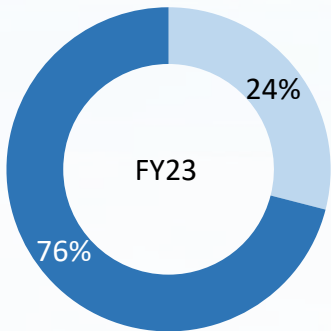
Revenue by Domains



Revenue by Geography

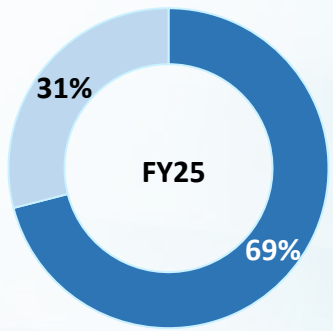
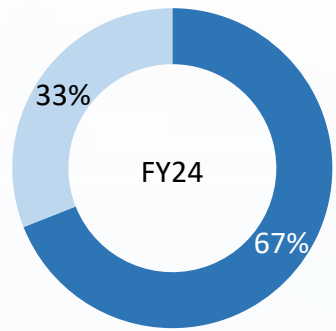
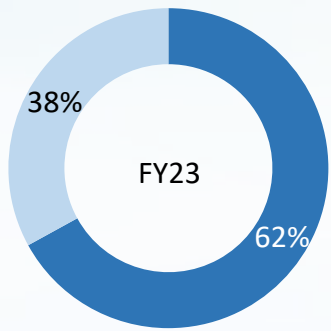


Revenue Mix



Onsite Offshore

Revenue by Project Type



Fixed Price Time and Material

Consolidated Profit and Loss Statement

| Particulars (in INR Cr.) | Q4 FY24 | Q3 FY25 | Q4 FY25 | YoY % | QoQ % | FY24 | FY25 | YoY % |
|-----------------------------------|--------------|--------------|--------------|----------------|----------------|--------------|--------------|----------------|
| Operating Revenue (\$ Mn) | \$ 31.0 | \$ 32.8 | \$ 31.4 | 1.1% | -4.3% | \$ 116.1 | \$ 122.7 | 5.7% |
| Revenue | 256 | 275 | 268 | 4.8% | -2.4% | 955 | 1,031 | 7.9% |
| Other Income | 5 | 2 | 4 | -29.1% | 63.0% | 10 | 21 | 109.6% |
| Total Income | 261 | 277 | 272 | 4.0% | -1.8% | 965 | 1,052 | 9.0% |
| Reported EBITDA | 32 | 40 | 37 | 15.2% | -7.3% | 133 | 142 | 6.9% |
| Reported EBITDA Margin (%) | 12.7% | 14.7% | 14.0% | 130 bps | -70 bps | 14.0% | 13.8% | -20 bps |
| Adj. EBITDA | 32 | 43 | 45 | 38.3% | 5.5% | 133 | 156 | 17.1% |
| Adj. EBITDA Margin (%) | 12.7% | 15.5% | 16.8% | 410 bps | 130 bps | 14.0% | 15.1% | 110 bps |
| EBIT | 23 | 30 | 28 | 21.4% | -5.8% | 99 | 103 | 3.4% |
| EBIT Margin (%) | 9.0% | 10.8% | 10.4% | 140 bps | -40 bps | 10.4% | 10.0% | -40 bps |
| Profit before Tax | 16 | 23 | 21 | 34.4% | -7.6% | 53 | 87 | 65.0% |
| Tax | 7 | 8 | -10 | -245.3% | -220.4% | 20 | 12 | -37.6% |
| Profit after Tax | 9 | 15 | 31 | 250.1% | 113.0% | 33 | 75 | 125.3% |
| PAT Margin % | 3.4% | 5.3% | 11.6% | 820 bps | 630 bps | 3.5% | 7.2% | 370 bps |

Consolidated Balance Sheet

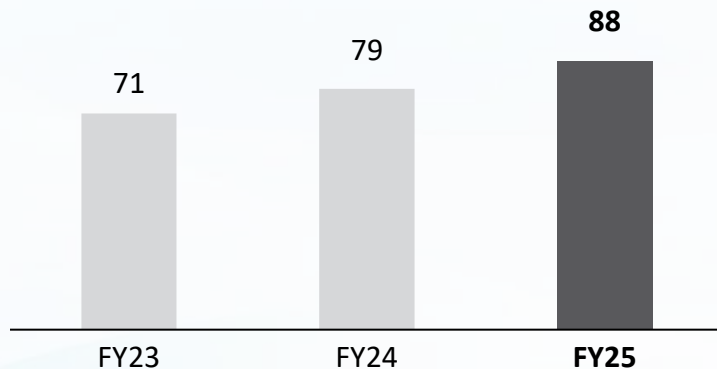
| Assets (INR Cr.) | Mar-24 | Mar-25 |
|--|--------------|--------------|
| Non-Current Assets | | |
| Property, Plant and Equipment | 69 | 82 |
| Capital Work-in-progress | - | 0.2 |
| Rights-of-use Assets | 152 | 138 |
| Goodwill and Other Intangible | 193 | 186 |
| Other Non-Current Assets | 62 | 78 |
| Total Non-Current Assets | 476 | 484 |
| Current Assets | | |
| Inventories | 69 | 61 |
| Investments | 29 | 52 |
| Trade Receivables | 234 | 302 |
| Cash & Cash Equivalents | 56 | 52 |
| Bank Balances other than Cash & Cash Equivalents | 97 | 37 |
| Other Current Assets | 178 | 139 |
| Total Current Assets | 663 | 643 |
| Total Assets | 1,139 | 1,127 |

| Equity and Liabilities (INR Cr.) | Mar-24 | Mar-25 |
|---------------------------------------|--------------|--------------|
| Equity | | |
| Equity Share Capital | 21 | 21 |
| Other Equity | 564 | 628 |
| Non-controlling Interest | 6 | 7 |
| Total Equity | 592 | 656 |
| Non-Current Liabilities | | |
| Borrowings | 106 | 109 |
| Lease Liabilities | 64 | 50 |
| Other Non-current liabilities | 32 | 22 |
| Total Non-Current Liabilities | 203 | 181 |
| Current Liabilities | | |
| Borrowings | 133 | 80 |
| Trade Payables | 64 | 58 |
| Lease Liabilities | 16 | 18 |
| Other Current Liabilities | 131 | 134 |
| Total Current Liabilities | 345 | 290 |
| Total Equity & Liabilities | 1,139 | 1,127 |

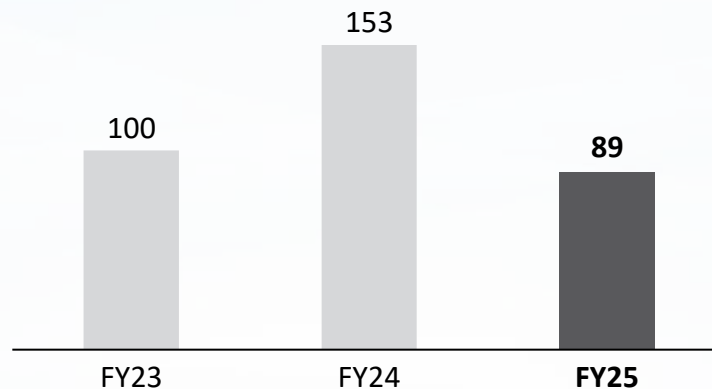
Key Financial Metrics

in INR crores

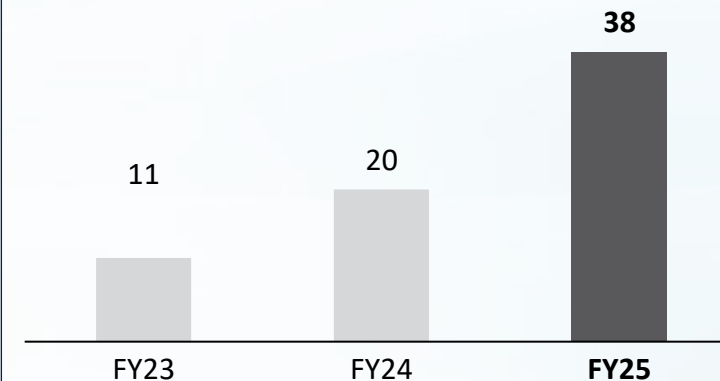
Cash flow from Operations



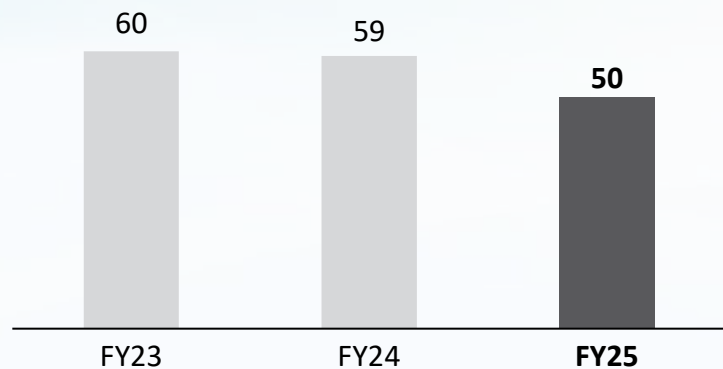
Cash and Cash Equivalents



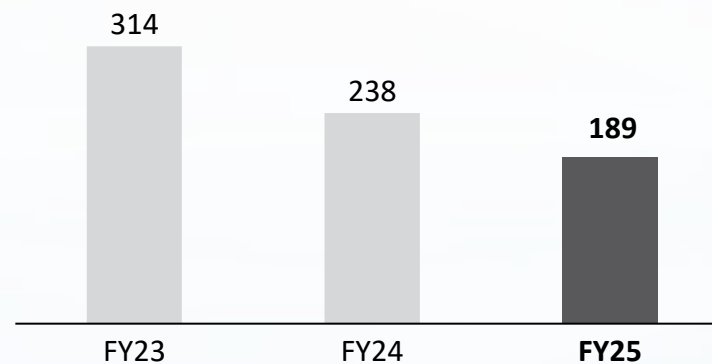
Capital Expenditure



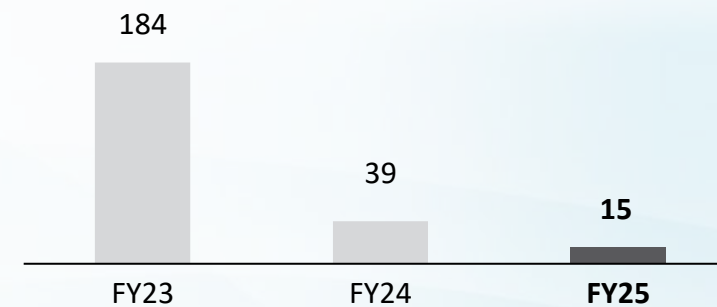
Free Cash Flows



Gross Debt



Net Debt



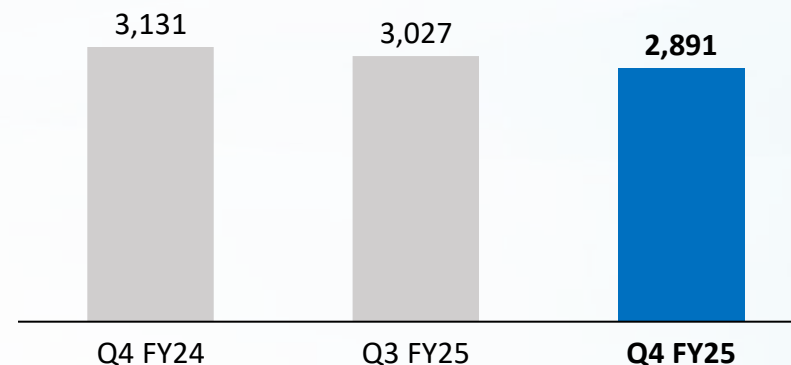
Key Takeaways

- ❖ A reduction in non-core employee metrics aligns with our strategy for optimizing business performance and margins
- ❖ Core headcount changes quarter over quarter are influenced by the ramp-down of specific programs
- ❖ Enablers / Support include essential leadership and other important hires needed to prepare for FY26

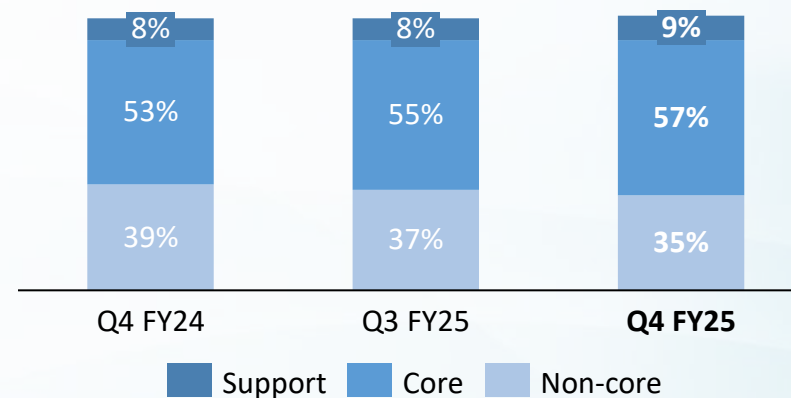
Employee Metrics

| | Q4 FY24 | Q3 FY25 | Q4 FY25 |
|--------------------|---------|---------|--------------|
| Core | 1,664 | 1,673 | 1,639 |
| Non Core | 1,220 | 1,116 | 999 |
| Support | 247 | 238 | 253 |
| Attrition rate (%) | 16% | 18% | 19% |

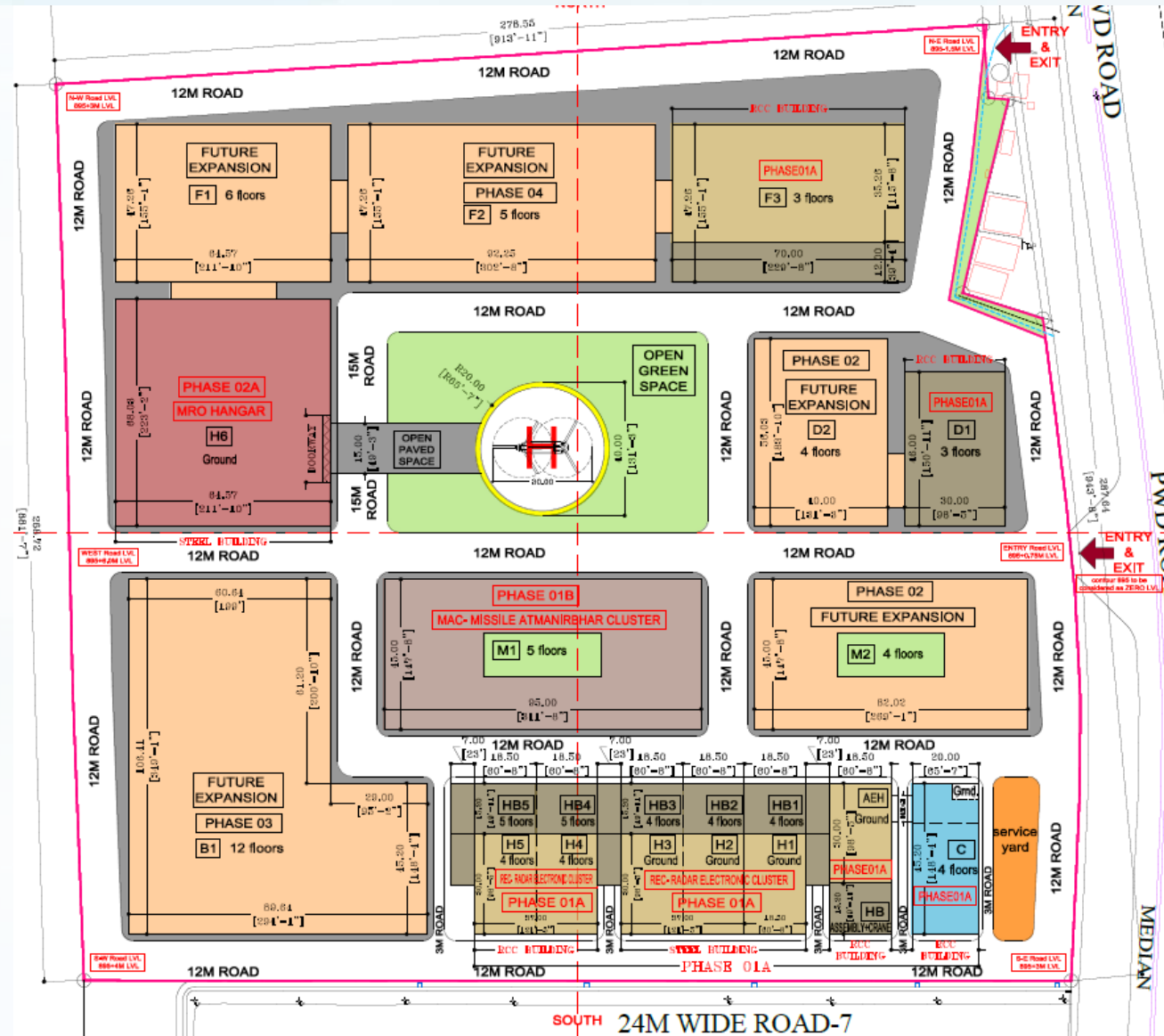
Total Headcount



Headcount by Domains



Strategic Investment – 20.70 Acres - 1.80 Mn Sq Ft 'Devanahalli Atmanirbhar Complex'



WHAT'S NEXT?

- By FY28, The company aims to invert its current revenue mix of 80% service revenue and 20% product revenue, which will be the key driver for Non-Linear growth.
- 300bps YoY improvement in EBITDA margins aiming at 24% EBITDA in 3 Years.
- Re-calibration of Non-Core businesses.
- Power 930 initiative – reach \$1B in revenues by FY30.

**Investment in
Leadership and
Talent**



To lead to supernormal
growth in revenues

**Transition to
Product-Led
Growth**



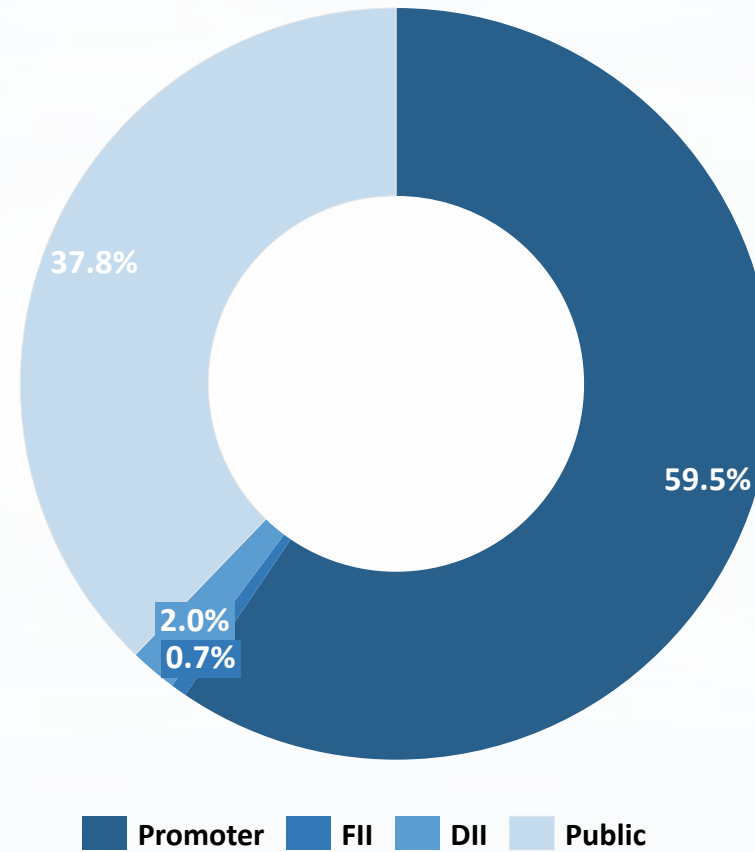
Strong margin
expansion

**Investment in
Infrastructure &
Capabilities**



Higher RoCE

Shareholding Pattern



COMPANY:



AXISCADES Technologies Limited

CIN : L72200KA1990PLC084435

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Thank You