

**January 30, 2026**

To  
**The Compliance Manager  
BSE Limited**  
Corporate Relationship Dept.,  
Phiroze Jeejeebhoy Towers,  
Dalal Street, Mumbai 400001.

To  
**The Manager, Listing Department  
National Stock Exchange of India Ltd**  
Exchange Plaza, Plot No. C/1, G Block,  
Bandra-Kurla Complex, Bandra (East),  
Mumbai 400 051.

Scrip Code: 544419

Symbol: ARISINFRA

**Sub: Investor Presentation**

Dear Sir/ Madam,

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations 2015, we are enclosing herewith the Investor Presentation, that will be presented on January 30, 2026 to the Analysts in connection with the Unaudited Financial Results (Standalone and Consolidated) of the Company for the Quarter ended December 31, 2025.

The same is also available on the Company's website at <https://aris.in/pages/investor-relations-disclosures>

You are requested to take the above information on record.

Thanking you,

Yours sincerely,  
**For Arisinfra Solutions Limited**

**Ronak Kishor Morbia**  
**Chairman and Managing Director**  
DIN: 09062500  
Place: Mumbai  
Encl.: As mentioned above



# ArisInfra<sup>.one</sup>

Simplifying Construction

Investor presentation Q3 FY26





# Disclaimer

This presentation has been prepared by Arisinfra Solutions Limited ("Company"), solely for information purposes and does not constitute any offer, recommendation or invitation to purchase or subscribe for any securities, and shall not form the basis or be relied on in connection with any contract or binding commitment what so ever. No offering of securities of the Company will be made except by means of a statutory offering document containing detailed information about the Company.

This Presentation has been prepared by the Company based on information and data which the Company considers reliable, but the Company makes no representation or warranty, express or implied, whatsoever, and no reliance shall be placed on, the truth, accuracy, completeness, fairness and reasonableness of the contents of this Presentation. This Presentation may not be all inclusive and may not contain all of the information that you may consider material. Any liability in respect of the contents of, or any omission from, this Presentation is expressly excluded.

Certain matters discussed in this Presentation may contain statements regarding the Company's market opportunity and business prospects that are individually and collectively forward-looking statements. Such forward-looking statements are not guarantees of future performance and are subject to known and unknown risks, uncertainties and assumptions that are difficult to predict. These risks and uncertainties include, but are not limited to, the performance of the Indian economy and of the economies of various international markets, the performance of the industry in India and world-wide, competition, the company's ability to successfully implement its strategy, the Company's future levels of growth and expansion, technological implementation, changes and advancements, changes in revenue, income or cash flows, the Company's market preferences and its exposure to market risks, as well as other risks.

The Company's actual results, levels of activity, performance or achievements could differ materially and adversely from results expressed in or implied by this Presentation. The Company assumes no obligation to update any forward-looking information contained in this Presentation. Any forward-looking statements and projections made by third parties included in this Presentation are not adopted by the Company and the Company is not responsible for such third party statements and projections



Key Metrics

# Q3 Highlights

Growth across all segments and lower working capital contributed to Arisinfra's strongest quarterly performance to date

**₹ 270.8 Cr**  
Revenue  
12% QoQ | 49% YoY

**₹ 30 Cr**  
EBITDA  
34% QoQ | 106% YoY

**11%**  
EBITDA Margin  
200 Bps QoQ | 300 Bps YoY

**₹ 18.3 Cr**  
Reported PAT  
20% QoQ | 790% YoY

**23.05%**  
ROCE

**₹ 185 Cr**  
Cash & Bank Balance

**2k+**  
Vendors

**3.1k +**  
Customers

**765+**  
Daily deliveries

**78%**  
Repeat Orders



**33%**  
YoY Growth in Value Added Services



**22%**  
YoY Increase in Volumes (in MT)



**718 Cr**  
Net worth



**20.62 Mn**  
Metric tones of construction materials delivered across projects



**1,174+**  
PIN Served

# Key Quarterly Updates



## Transcon Group & Amogaya Projects to Unlock over ₹12,000 Crore in Real Estate Value

ArisUniterm RE Solutions Pvt. Ltd., subsidiary of Arisinfra Solutions Ltd., has been appointed as the Strategic Partner for Amogaya Adorit in Bengaluru, managing end-to-end sales, marketing, branding, CRM, and material supply. The company also secured a strategic consulting mandate from Transcon Group, Mumbai, projected to add ₹9.6 crore in EBITDA over the next five months.



## Arisinfra Evaluates Entry into India's ₹35,000+ Crore Asphalt Market

Arisinfra Solutions Ltd., signed strategic MoU with JS Infra Solutions to explore collaboration in asphalt and road infrastructure materials, strengthening Arisinfra's network-led expansion in the segment.



## Arisinfra Bags ₹35 Crore Asphalt Order Through Network-Led Model

Arisinfra Solutions Ltd., through its subsidiary Buildmex Infra Pvt. Ltd., secured an asphalt order worth approximately ₹35 crore from Goswami Infra. The order reinforces order book momentum and marks a strategic expansion into road infrastructure materials.



Segments

# Revenue Break-up

Asset-light capacity reservation driving scalable supply model.

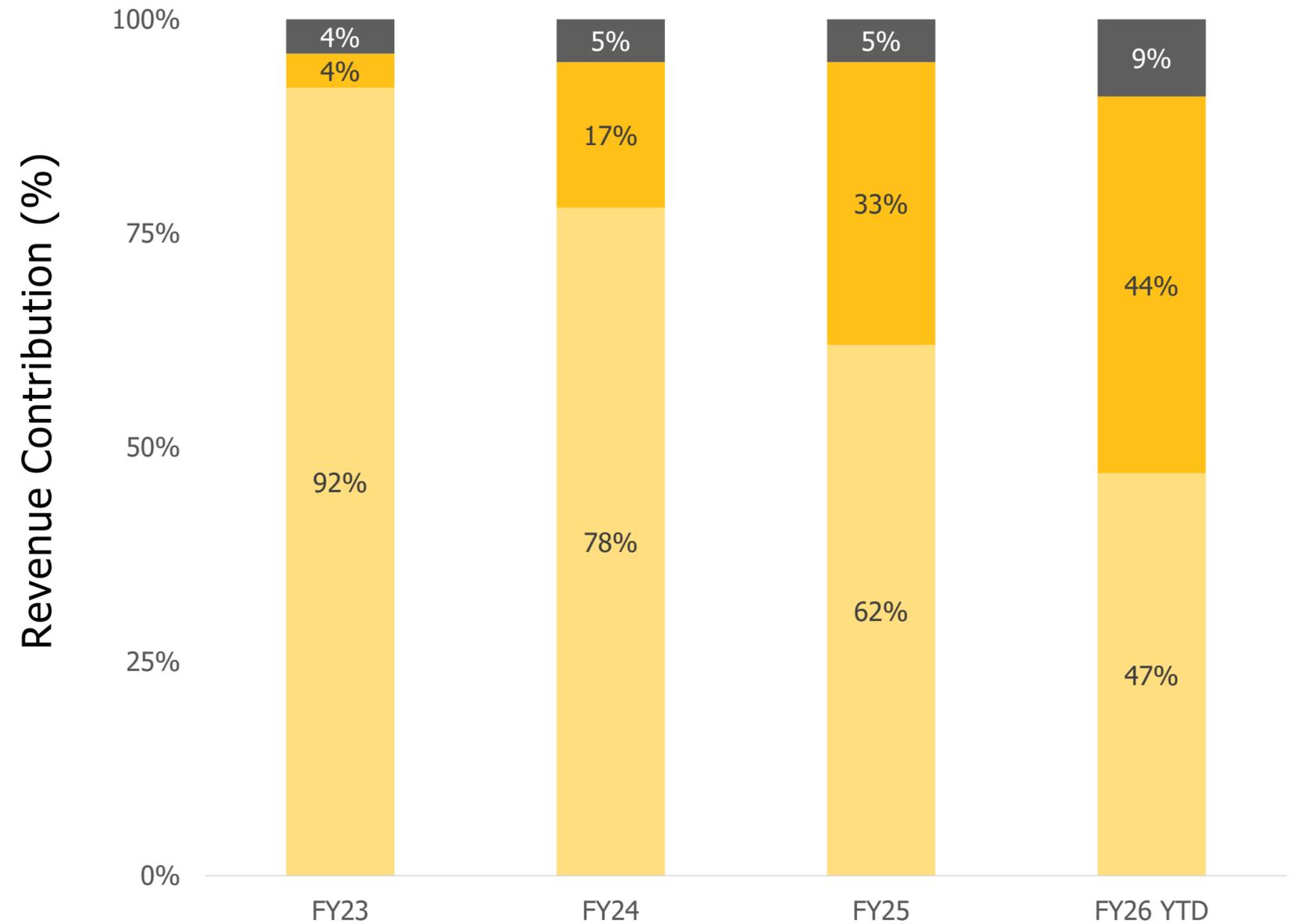
▲ **9%**

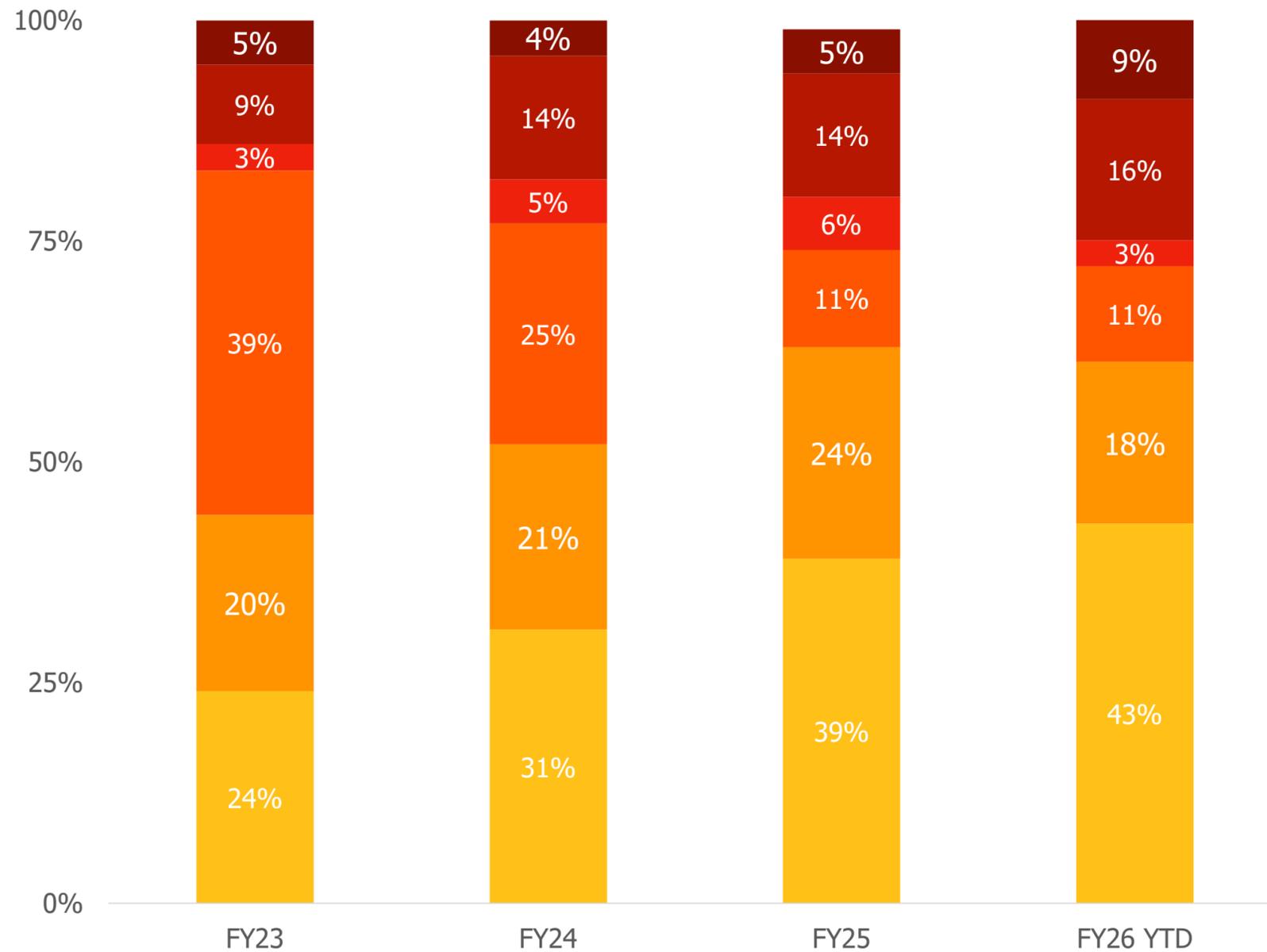
Revenue Contribution from services

▲ **44%**

Revenue contribution from CM

■ B2B Supply ■ Contract Manufacturing ■ Services





Growing Supply

# Category Mix

Asset-light capacity expansion across categories like Aggregates & Ready-Mix Concrete driving scalable supply model.

▲ **61%**

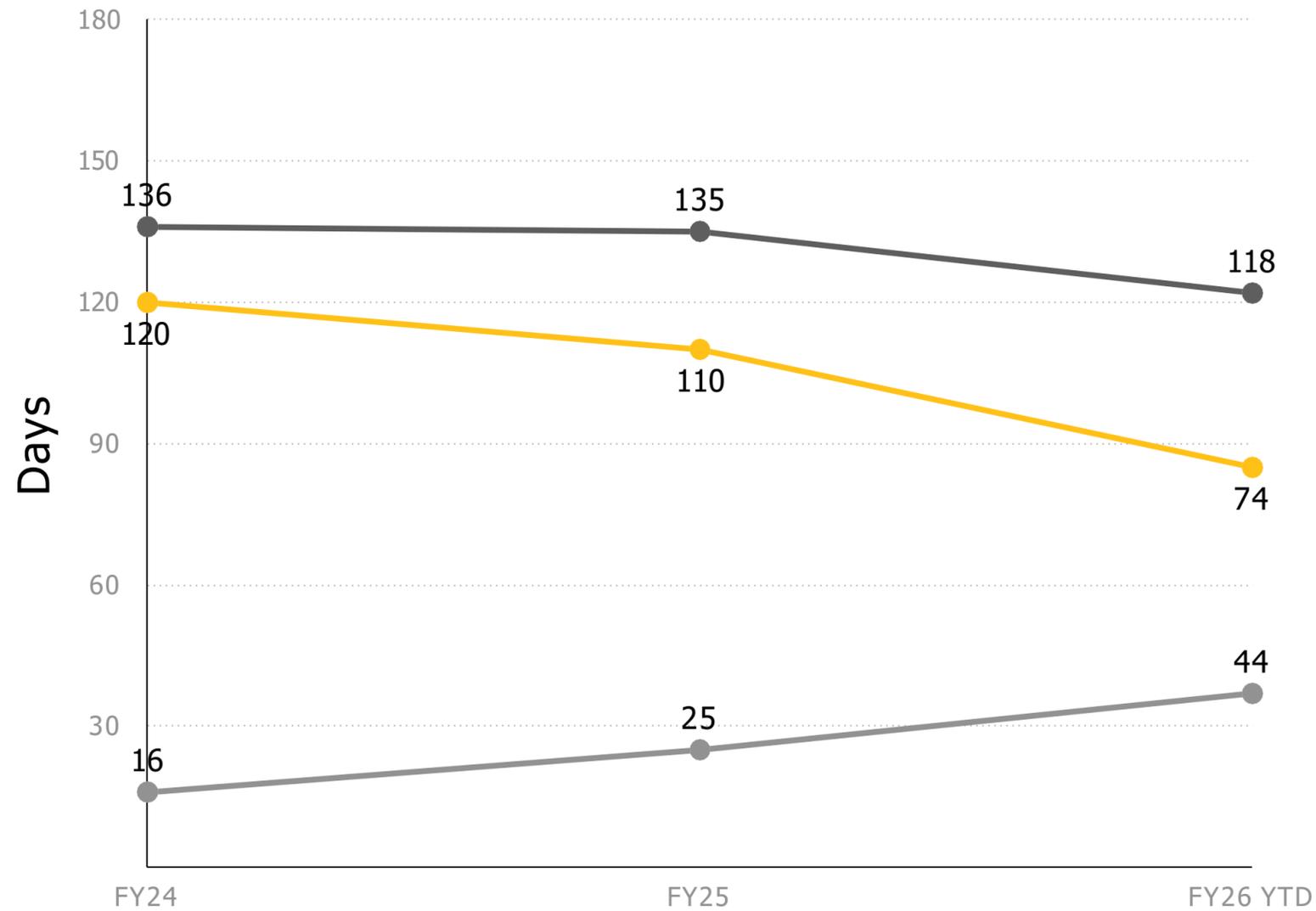
Aggregates & RMC

▲ **9%**

Services



● NWC      ● DPO      ● DSO



Overview

# Working Capital

FY24–FY26 YTD trend reflects consistent improvement and operational discipline.

▼ **74**

NWC Days



Trust

# Marquee Customers

Trusted by India's leading developers and contractors, driving scale and recurring growth

**3,133+**

Customers

**42%**

Revenue contribution from top 5 clients




# Customer Case Study



## SOURCING FROM MULTIPLE VENDORS:

Ensures reduced dependency on single supplier. This diversified approach also mitigates risks related to delays or quality issues and enables businesses to maintain consistent operations.



## QUALITY:

Arisinfra takes ownership of end to end transaction ensuring good quality material reaches to the site on time. Our technology helps in faster invoicing leading to improved cashflows for contractor

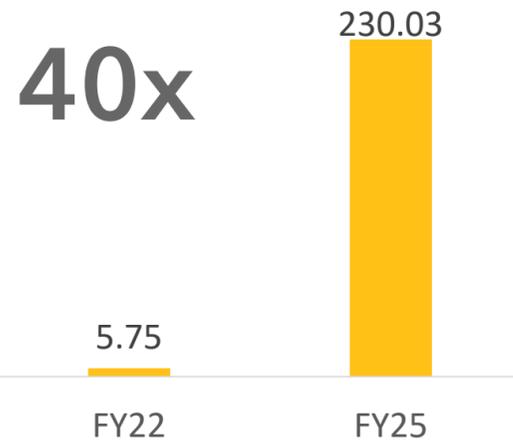


## TRUSTED PARTNER:

Arisinfra is a key supplier for materials across multiple projects and sites and providing convenience at fingertips.

### CASE STUDY 1

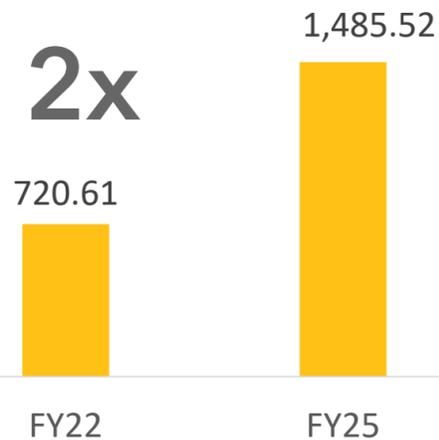
Listed largest contractor working across 5 categories across multiple states



Revenue in INR Mn

### CASE STUDY 2

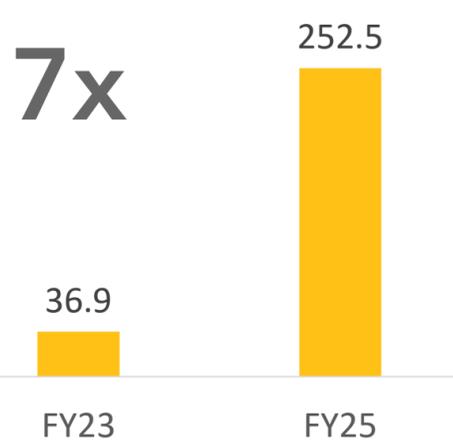
Listed contractor working in 14+ categories and managing supply chain of 500+ vendors



Revenue in INR Mn

### CASE STUDY 3

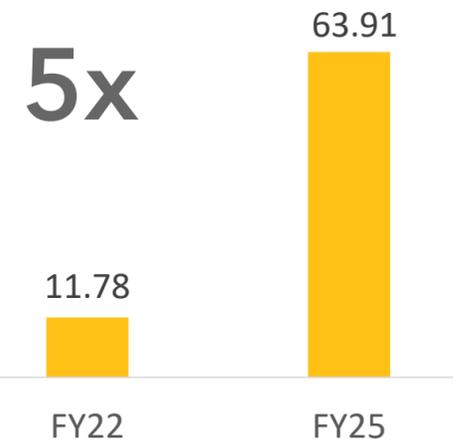
Prestigious Real estate developer working across multiple projects



Revenue in INR Mn

### CASE STUDY 4

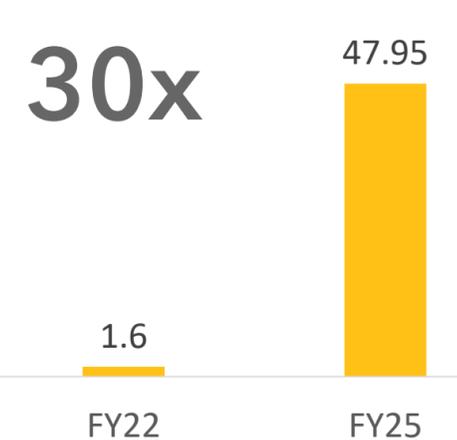
Major Indian Retail Company



Revenue in INR Mn

### CASE STUDY 5

Pan India RMC manufacturer



Revenue in INR Mn

# Supplier Case Studies



## RECURRING BUSINESS:

Ensuring a continuous revenue stream by creating consistent demand- enabling predictable workflows, and steady cash flow



## WIDER REACH:

The SME supplier have been able to reach a wider set of customers



## INCREASED CAPACITY UTILIZATION:

Empowering vendors to optimize plant capacity, improve operational efficiency and drive better unit economics

### CASE STUDY

1

SME Ready-mix concrete manufacturer

186x

5.76

FY22

1069.69

FY25

Purchases in INR Mn

### CASE STUDY

2

Aggregate crusher based out of Chennai

6x

96.02

FY23

600.46

FY25

Purchases in INR Mn

### CASESTUDY

3

Aggregate manufacturer based out of Mumbai

5x

38.54

FY23

178.46

FY25

Purchases in INR Mn

### CASESTUDY

4

Real Estate Builder and Contactor

166x

0.51

FY22

84.71

FY25

Purchases in INR Mn

### CASESTUDY

5

Eco friendly Building Materials Supplier

32x

1.06

FY23

34.14

FY25

Purchases in INR Mn

The background features a warm, golden-yellow color palette. On the left, a large, semi-transparent white arrow points upwards and to the right. In the center and right, there are several stacks of gold coins, some in sharp focus and others blurred in the background. The overall composition is clean and professional, typical of a corporate financial report.

# FINANCIAL

overview

# Management Comment



**Ronak Kishor Morbia**

Chairman & Managing Director

*“Our Q3 FY26 performance reflects the continued evolution of Arisinfra into an execution-led, systems-driven platform. While demand across Contract Manufacturing and Services remained steady, our focus during the quarter was on strengthening execution capability, improving capital velocity, and building visibility across complex infrastructure and real estate engagements.*

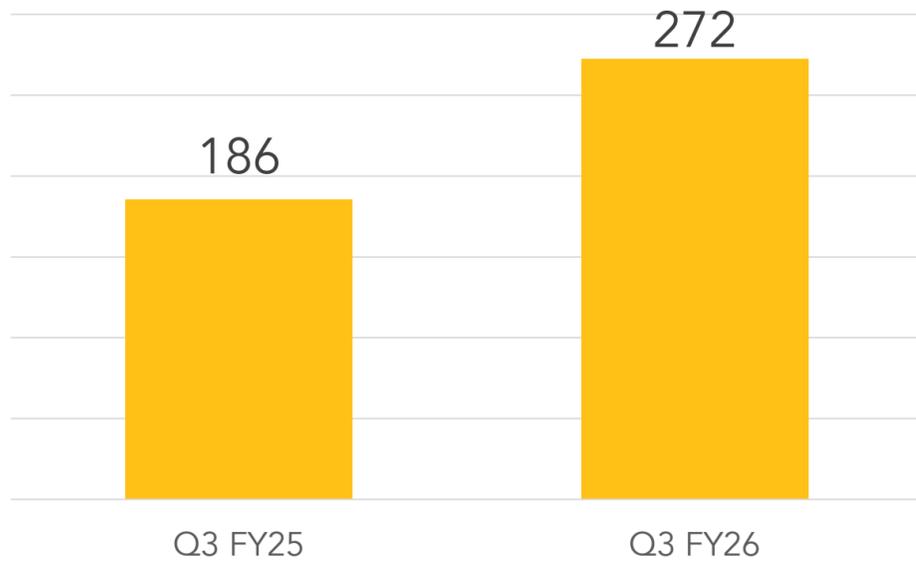
*During the quarter, Total Income stood at ₹272.5 crore, with EBITDA of ₹30 crore and PAT of ₹18.3 crore. Performance was supported by disciplined cost management, tighter working capital controls, and a growing share of execution-linked and service-led revenues.*

*As India’s infrastructure and real-estate ecosystem moves toward larger, faster, and more accountability-driven projects, value creation is increasingly shifting from pure supply to execution reliability and coordination. In response, we are expanding selectively into execution-intensive categories such as road infrastructure and asphalt through asset-light, partnership-led models, while deepening our integrated services capabilities across project lifecycle management.*

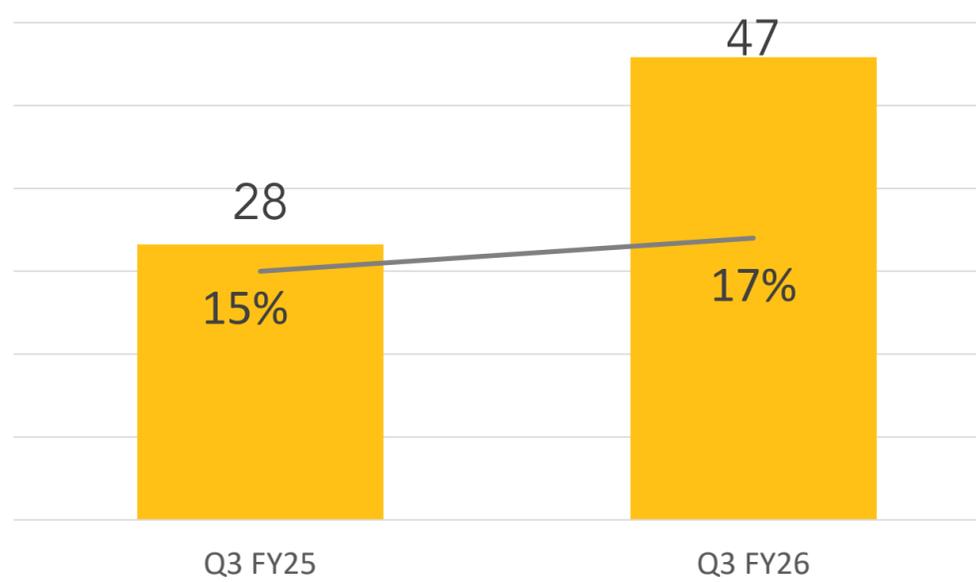
*Looking ahead, our priorities are centred on scaling execution without balance-sheet strain, increasing repeat institutional engagements, and embedding technology-led control across sourcing, delivery, and cash cycles. With improving demand visibility and strengthening execution partnerships, we are well positioned to deliver sustainable, capital-efficient growth.”*

# Financial Highlights Q3 FY26

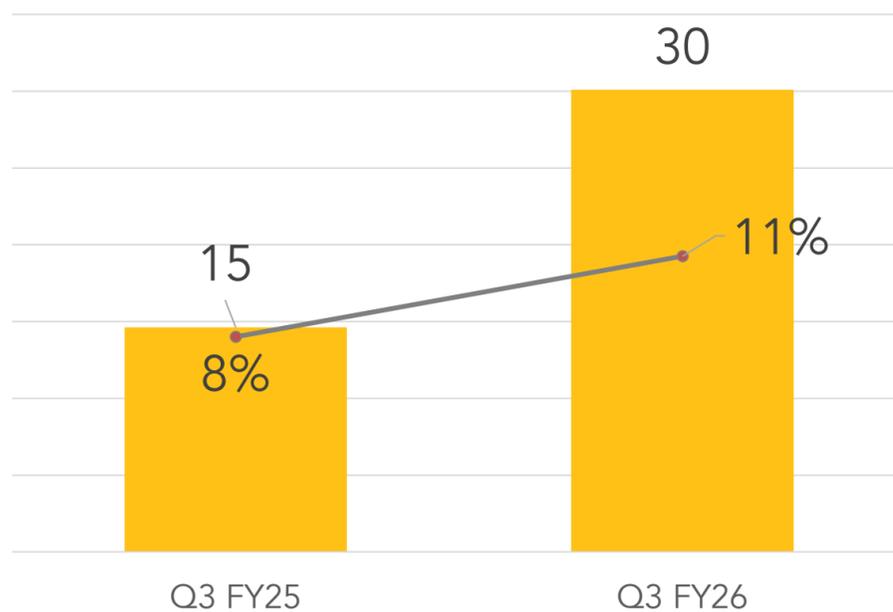
Total Income (₹ Cr)



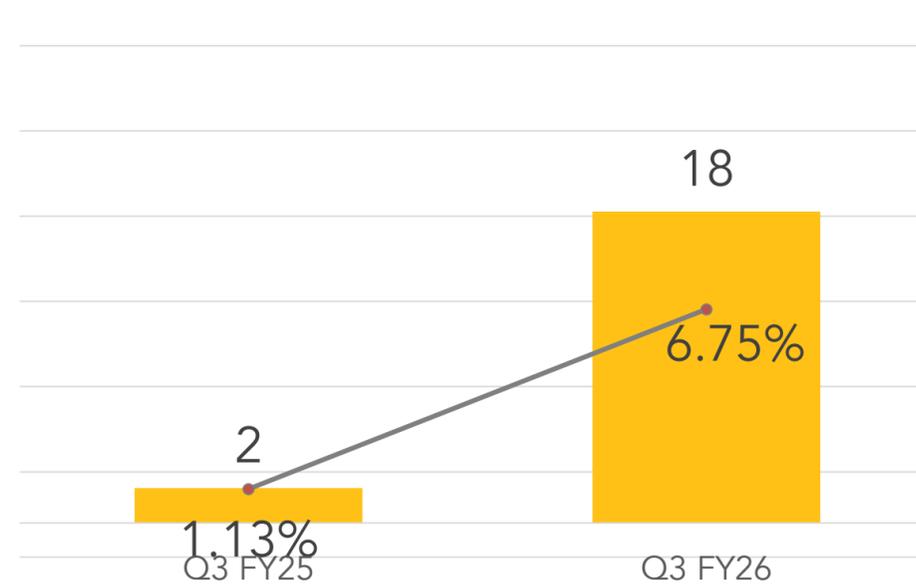
Gross Profit & Gross Margin (%) (₹ Cr)



EBITDA & EBITDA Margin (%) (₹ Cr)



PAT & PAT Margin (%) (₹ Cr)



- Total Income increase by 47% driven by higher daily dispatches, Deeper penetration into existing customers and increasing revenue from service business.
- Highest ever EBITDA margin achieved in Q3 FY26 which stood at 11.75%. Maintaining the favorable product mix and increasing contribution from value added service business.

# Consolidated Statement of Profit & Loss

(₹ Cr)

Particulars	Q3 FY26	Q3 FY25	Y-o-Y (%)	9M FY26	9M FY25	Y-o-Y (%)
Revenue From Operations	270.83	181.82	49%	724.11	546.52	33%
Other Operating Income	0.60	2.32		1.95	6.91	
Other Income	1.05	1.44		4.48	4.33	
<b>Total Income</b>	<b>272.48</b>	<b>185.58</b>	<b>47%</b>	<b>730.54</b>	<b>557.76</b>	<b>31%</b>
Gross Profit	46.52	27.64		117.41	77.55	
<i>Gross Profit Margin</i>	<i>17%</i>	<i>15%</i>		<i>16%</i>	<i>14%</i>	
<b>EBITDA</b>	<b>30.10</b>	<b>14.62</b>	<b>106%</b>	<b>72.19</b>	<b>46.94</b>	<b>54%</b>
<b><i>EBITDA Margin</i></b>	<b><i>11.11%</i></b>	<b><i>9.34%</i></b>	<b><i>300 Bps</i></b>	<b><i>9.97%</i></b>	<b><i>8.59%</i></b>	<b><i>138 Bps</i></b>
Depreciation	0.95	0.77		2.49	2.52	
Interest / Finance Cost	5.47	10.58		21.76	30.10	
Exceptional Item (Gain) / Loss		1.55		2.58	7.06	
Reported PBT	24.73	3.15		49.80	11.60	
Tax	6.46	1.10		11.17	5.07	
<b>Reported PAT</b>	<b>18.27</b>	<b>2.05</b>	<b>790%</b>	<b>38.64</b>	<b>6.53</b>	<b>491%</b>
<b><i>PAT Margin</i></b>	<b><i>6.74%</i></b>	<b><i>1.13%</i></b>	<b><i>562 Bps</i></b>	<b><i>5.32%</i></b>	<b><i>1.19%</i></b>	<b><i>413 Bps</i></b>
EPS in Rs.	1.90	0.07		4.38	0.62	

# Thank You



## **ARISINFRA SOLUTIONS LTD**

(Formerly known as Arisinfra Solutions Private Limited)

E-mail: [cs@arisinfra.one](mailto:cs@arisinfra.one)

Tel: +91 9594516097

BSE: 544419, NSE: ARISINFRA|

Website: [www.arisinfra.com](http://www.arisinfra.com)