

November 04, 2025

**Listing Department,  
BSE Ltd.,**  
Phiroze Jeejeebhoy Towers,  
Dalal Street,  
Mumbai-400 001  
Scrip Code: **544413**

**Listing Department,  
National Stock Exchange of India  
Limited,**  
“Exchange Plaza”,  
Bandra - Kurla Complex, Bandra (East),  
Mumbai-400 051  
Symbol: **DIGITIDE**

Dear Sir/ Madam,

**Sub: Submission of Investors' Presentation.**

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, kindly find enclosed Investors' Presentation on the financial performance of the Company for the second quarter and half year ended September 30, 2025.

Request to please take the same on record.

Yours faithfully,  
For **Digitide Solutions Limited**

**Neeraj Manchanda**  
**Company Secretary & Compliance Officer**  
**Membership No. A20060**

Encl:- as above

**Digitide Solutions Limited**

Registered Address: 3/3/2, Bellandur Gate, Sarjapura Main Road, Bengaluru -560103, Karnataka  
Tel: 080-6105 6000 | CIN: L62099KA2024PLC184626 | Website: [www.digitide.com](http://www.digitide.com)

# Digitide Solutions Ltd



## Q2 FY26 Investor Presentation

4 November 2025





## Safe Harbor and Disclaimer



This presentation has been prepared by Digitide Solutions Limited ("Company") solely for information purposes without any regard to any specific objectives, financial situations or informational needs of any particular person. This presentation may not be copied, distributed or disseminated, directly or indirectly, in any manner. Failure to comply with this directive may result in a violation of the applicable law in certain jurisdictions. By reviewing this presentation, you agree to be bound by the restrictions contained herein, and to maintain absolute confidentiality, regarding the information disclosed in these materials.

This presentation does not constitute or form part of and should not be construed as, directly or indirectly, any offer or invitation or inducement to sell or issue, or any solicitation of any offer to purchase or subscribe for, any securities of the Company by any person in any jurisdiction, including in India, nor shall it or any part of it or the fact of its distribution form the basis of, or be relied on in connection with, any investment decision or any contract or commitment, therefore.

This presentation contains statements that constitute forward looking statements. These statements include descriptions regarding the intent, belief or current expectations of the Company or its directors and officers with respect to the results of operations and financial condition of the Company. These statements can be recognized by the use of words such as "expects", "plans", "will", "estimates", "projects", or other words of similar meaning. Such forward-looking statements are not guarantees of future performance and involve risks and uncertainties, and actual results may differ materially from those in such forward-looking statements as a result of various factors and assumptions which the Company believes to be reasonable in light of its operating experience in recent years. The risks and uncertainties relating to these statements include, but not limited to, risks and uncertainties, regarding fluctuations in earnings, our ability to manage growth, competition, our ability to manage our international operations, government policies, regulations, etc. The Company does not undertake any obligation to revise or update any forward-looking statement that may be made from time to time by or on behalf of the Company including to reflect actual results, changes in assumptions or changes in factors affecting these statements. Given these risks, uncertainties and other factors, viewers of this presentation are cautioned not to place undue reliance on these forward-looking statements. This presentation may contain certain currency exchange rates and the same have been provided only for the convenience of readers.

## Contents

digitide



### **Journey So Far**

---



### **Financial Highlights**

---



### **Way Forward**

---



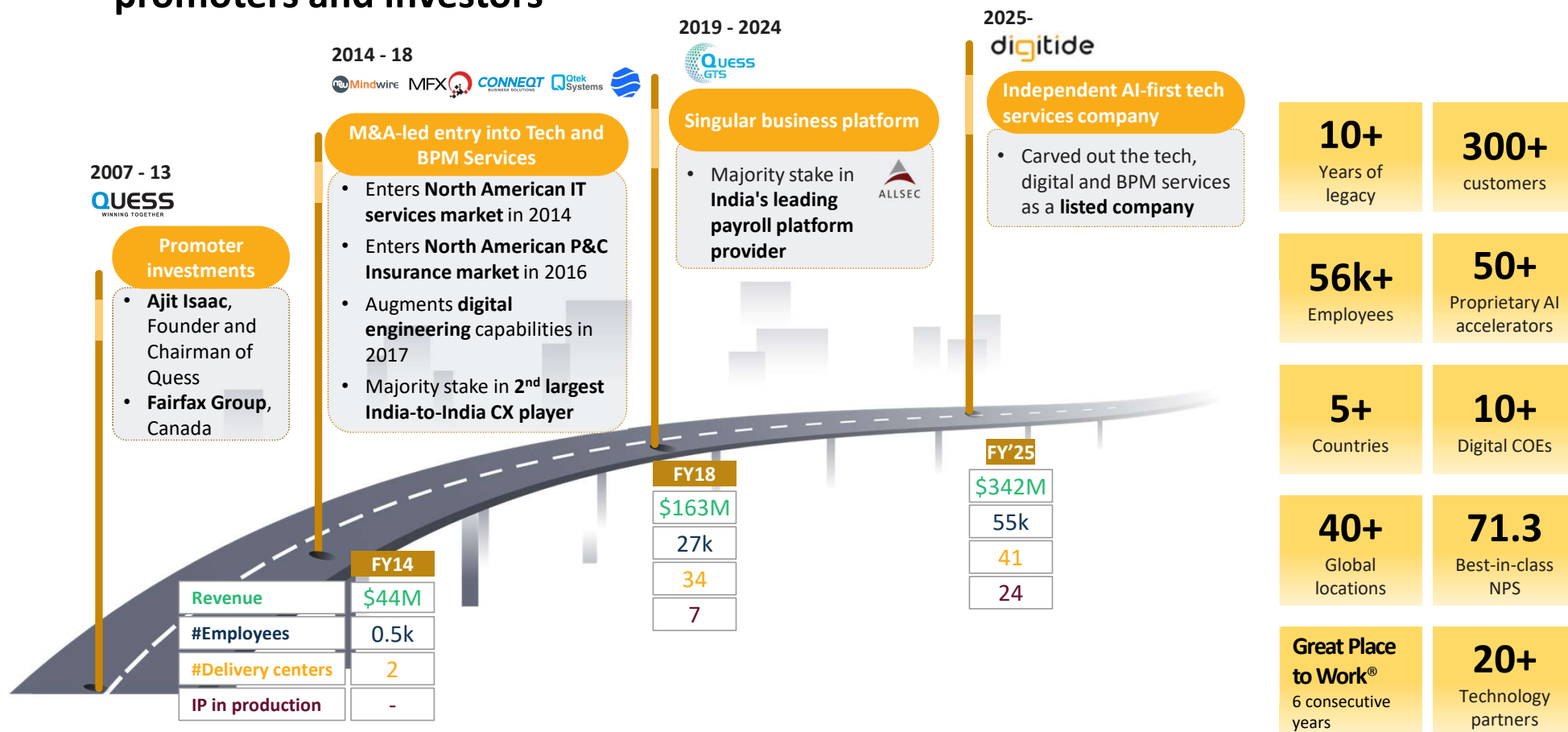
### **Annexure**

**Journey So Far**

The background is a solid black field. On the left, a trail of particles in shades of orange, red, and pink curves downwards. In the center, a thin, wavy line of cyan and blue particles extends from the left towards the right. On the right side, a larger, more complex structure of blue and cyan particles is visible. Overlaid on the right side is a large, dark olive-green geometric logo consisting of several interlocking, rounded shapes that form a stylized 'S' or a series of nested curves.

## Proven legacy of transforming businesses, backed by long-term promoters and investors

digitide



Note: 1\$=84 INR conversion rate

## Established and diversified business with proven scale

### Our service lines



#### Digital and AI Engineering



Digital Engineering



Infra and Cloud Services



App Implementation and MS



Cybersecurity Services



#### AI, Data and Analytics



Data modernization



Conversational AI chatbots



Data hub (proprietary)



Advanced Analytics



BI and Data Visualization



#### BPM and BPaaS Services\*



Voice



Customer Experience



Collections



Non-voice



Employee Experience



Finance and Back Office

...powered by 50+ proprietary AI platforms and accelerators

(Pulse.ai, Nikki.ai, AI Screener, AI-powered data hub, and many more)

### Our vertical and geographical presence



Banking and Financial Services



Insurance



Healthcare



Fast Growth Tech



Auto & Manufacturing

### ...with proven scale

**\$3B**

Collections managed annually

**\$25B+**

Premiums processed on proprietary platform

**20+**

Healthcare specialty lines covered

**1B+**

Customer connects annually

**1K+**

Data servers managed

**18M+**

Payroll transactions processed annually

Note:

\*BPM = Business Process Management & BPaaS = Business Process as a Service



## Strong presence in North America with global delivery capabilities



### 40+ locations spread across 5 countries



#### North America: 9+ locations across 2 countries



Bridgewater  
Ottawa  
Calgary  
Langford  
Toronto  
Mississauga  
Morris Plains  
(USA HQ)  
Montreal  
Hoboken  
(NJ)



#### Offshore: 30+ locations across 3 countries



Indore  
Dubai  
Mumbai  
Pune  
Bengaluru  
Chennai  
Delhi  
Kolkata  
Manila  
Hyderabad

20 additional delivery locations in India not mapped

Key delivery center

Business center

Data center

AI Center of Excellence



## Financial Highlights



## Highlights Q2 FY26



### Business Highlights



#### Sales momentum

- Revenue up 7% YoY and 4% QoQ to ₹764cr
- Tech & Digital revenue up 16% QoQ and 23% YoY
- International business revenue up 4% YoY
- TCV booking of 550 Cr in Q2 (up 5% QoQ)
- 24 new logos won during the quarter
- 50% of the deal pipeline is AI infused



#### Partnership-led growth

- Tier 1 Partnership with AWS and Azure - AWS and Microsoft will co-invest in select transformation programs



#### AI Achievements & Innovations

- Won the Google Agentic AI Hackathon
- Conversational AI delivering 92-95% efficacy—live with 20+ customers (incl. 4 PSU banks)—with chatbots and voicebots handling info and transactions at 92–95% post-training accuracy



#### Industry recognition



Star Performer + Major  
Contender APAC and Global  
Multi-Country Payroll



Major Contender for  
Property & Casualty (P&C)  
Insurance IT & BPS



Major Contender for Customer  
Experience Management  
Services – APAC and Americas

## Growth momentum continues in Q2 FY26; H1 revenue crossed ₹1,500 Cr for the first time

	Q1 FY26	Q2 FY26	H1 FY26
Revenue	<b>₹ 736 Cr</b> QoQ ▲ 0.4%   YoY ▲ 6%	<b>₹ 764 Cr</b> QoQ ▲ 4%   YoY ▲ 7%	<b>₹ 1,500 Cr</b> YoY ▲ 6.4%
EBITDA	<b>₹ 83 Cr</b> Margin 11.2% QoQ ▲ 4bps	<b>₹ 85 Cr</b> Margin 11.1% QoQ ▼ 8bps	<b>₹ 168 Cr</b> Margin 11.2% YoY ▼ 358bps
Adj PAT*	<b>₹ 19 Cr</b> Adj PAT 2.5% QoQ ▼ 136bps	<b>₹ 17 Cr</b> Adj PAT 2.2% QoQ ▼ 34bps	<b>₹ 35 Cr</b> Adj PAT 2.4% YoY ▼ 199bps
PAT	<b>₹ 10 Cr</b> PAT 1.3% QoQ ▲ 150bps	<b>₹ 3 Cr</b> PAT 0.4% QoQ ▼ 96bps	<b>₹ 12 Cr</b> PAT 0.8% YoY ▼ 485bps

### \* One-time impacts in Q1 FY26

- Demerger related professional expenses 6 cr
- Demerger related stamp duty 2.8 cr

### \* One-time impacts in Q2 FY26

- Demerger related professional expenses 11.4cr
- Demerger related stamp duty 2.4cr
- Tax on account of Dividend from Alldigi: 5.1cr

## Q2 FY26: Revenues up 4% QoQ led by Tech & Digital (up 16% QoQ)

### Financials

In ₹ Cr	Q1 FY26	Q2 FY26	QoQ	YoY
Revenue	736	764	4%	7%
EBITDA	83	85	3.1%	-17.6%
EBITDA %	11.2%	11.1%	-8bps	-332bps
Adj PAT	19	17	-10.2%	-28.7%
Adj PAT %	2.5%	2.2%	-34bps	-109bps
PAT	10	3	-71.6%	-88.9%
PAT %	1.3%	0.4%	-96bps	-311bps

### Segment Overview

Revenue (Mix)	Q1 FY26	Q2 FY26	QoQ	YoY
	₹ Cr	Mix	₹ Cr	Mix
BPM	539	73%	536	70%
Tech & Digital	197	27%	228	30%
Total	736	100%	764	100%

Segment EBITDA*	Q1 FY26	Q2 FY26	QoQ	YoY
	₹ Cr	EBITDA %	₹ Cr	EBITDA %
BPM	90	16.7%	84	15.6%
Tech & Digital	19	9.6%	22	9.6%
Total	109	14.8%	106	13.8%

Note:

\*Segment EBITDA is excluding unallocated corporate cost. YoY nos. are unaudited

\*\*MEU = Manufacturing, Energy and Utility & FGT = Fast Growth Tech



Tech & Digital share has risen to 30% and International business to 37% in Q2 FY26

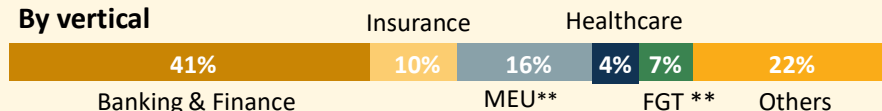
### Revenue by Service (₹ Cr)



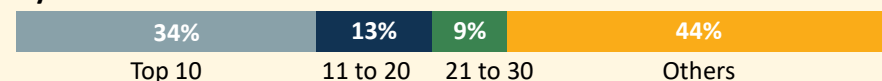
### By geography (₹ Cr)



### By vertical



### By Client concentration



### Q2 FY26 Highlights

- Strong momentum in Tech & Digital with QoQ growth of 16% and YoY growth of 23%
- International revenue grows by 6% QoQ and 4% YoY
- All demerger-related activities were concluded in Q2 FY26, which represents the last quarter of such efforts

## H1 FY26: Revenues up 6% YoY led by Tech & Digital (up 13% QoQ)

### Financials

	H1 FY25	H1 FY26	YoY
Revenue	1410	1500	6.4%
EBITDA	208	168	-19.4%
EBITDA %	14.8%	11.2%	-358bps
Adj PAT	62	35	-43.1%
Adj PAT %	4.4%	2.4%	-204bps
PAT	80	12	-84.4%
PAT %	5.7%	0.8%	-485bps

### Segment Overview

Revenue (Mix)	H1 FY25		H1 FY26		YoY
	₹ Cr	Mix	₹ Cr	Mix	
BPM	1034	73%	1074	72%	4%
Tech & Digital	376	27%	426	28%	13%
Total	1410	100%	1500	100%	6.4%

Segment EBITDA*	H1 FY25		H1 FY26		YoY
	EBITDA %	₹ Cr	EBITDA %	change	change
BPM	178	17.2%	174	16.2%	-103bps
Tech & Digital	43	11.6%	41	9.6%	-199bps
Total	221	15.7%	214	14.3%	-140bps

### Q2 FY26 Highlights

- H1 FY26 revenue growth of 6.4%
- Strong momentum in Tech & Digital with revenue growth of 13%

Note:

- \* Segment EBITDA is excluding unallocated corporate cost. YoY nos. are unaudited

**Way Forward**

The image features a dark background with vibrant, multi-colored particle trails in shades of orange, red, pink, teal, and blue. These trails appear to flow from the left side towards the right. On the right side, there is a large, semi-transparent olive-green geometric shape composed of several overlapping, rounded rectangular blocks. The overall aesthetic is modern and abstract, suggesting a path or journey.

## Well-defined 3x3x3 strategy

**3x**  
Growth

- From ~\$342M to \$1B revenue
- **Grow 2x** faster than market
- **200-300 bps** improvement in EBITDA margin
- **2x** improvement in billing realization per FTE

**3x**  
Verticals

### Domestic

- BFSI
- FGT
- Manufacturing, Energy & Utilities

### International

- BFSI
- Healthcare
- FGT

**3x**  
Service lines

- Digital and AI Engineering
- Data, Analytics and AI
- BPM & BPaaS

Maximize the core | Capture adjacencies | Unlock new frontiers



 We are going all-in on AI

digitide

Digitide's AI Centre of Excellence: Pulse.AI



Pulse.  
Banking.AI



Pulse.  
Insurance.AI



Pulse.  
Healthcare.AI



Pulse.  
Fast Growth  
Tech.AI



Pulse.  
Manufacturing.AI



Pulse.AI for  
processes



Intelligent Customer Experience



Enhanced Employee Experience



Pulse.AI for  
enterprise



AI-powered Adaptive Tech



AI-enabled Smart Finance



AI-driven Risk & Compliance



Pulse.AI  
tech  
accelerators

Coversation.ai

Cognitive.ai

Content.ai

Data.ai

Vision.ai

Docusense.ai

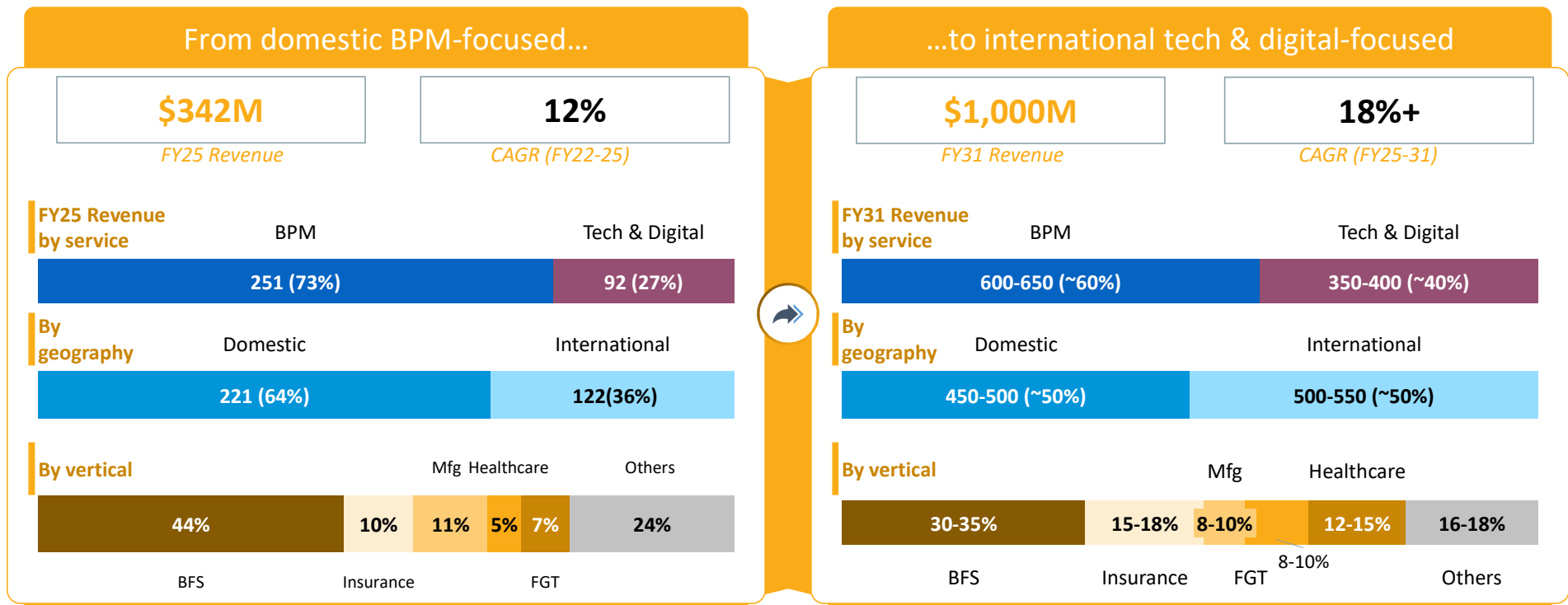
50+ AI accelerators in production

20+ Ecosystem Partners

## Pivotal shift as we reach to \$1B in revenue by FY31

**Vision** | Be the responsible transformation partner that customers trust

**Aspiration** | To become a \$1B AI-led value creator



Note: \$1 = INR 84 conversion rate

## Our guiding principles



### Market-leading growth



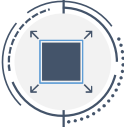
3x revenue growth to \$1B by FY31



2x of market growth



EBITDA margin expansion by 200 bps



25-30% of revenue growth to be fueled by inorganic route



### Value creation for all



Stable and long-term Promoters & Investors on cap table



Achieving 18%+ return on equity

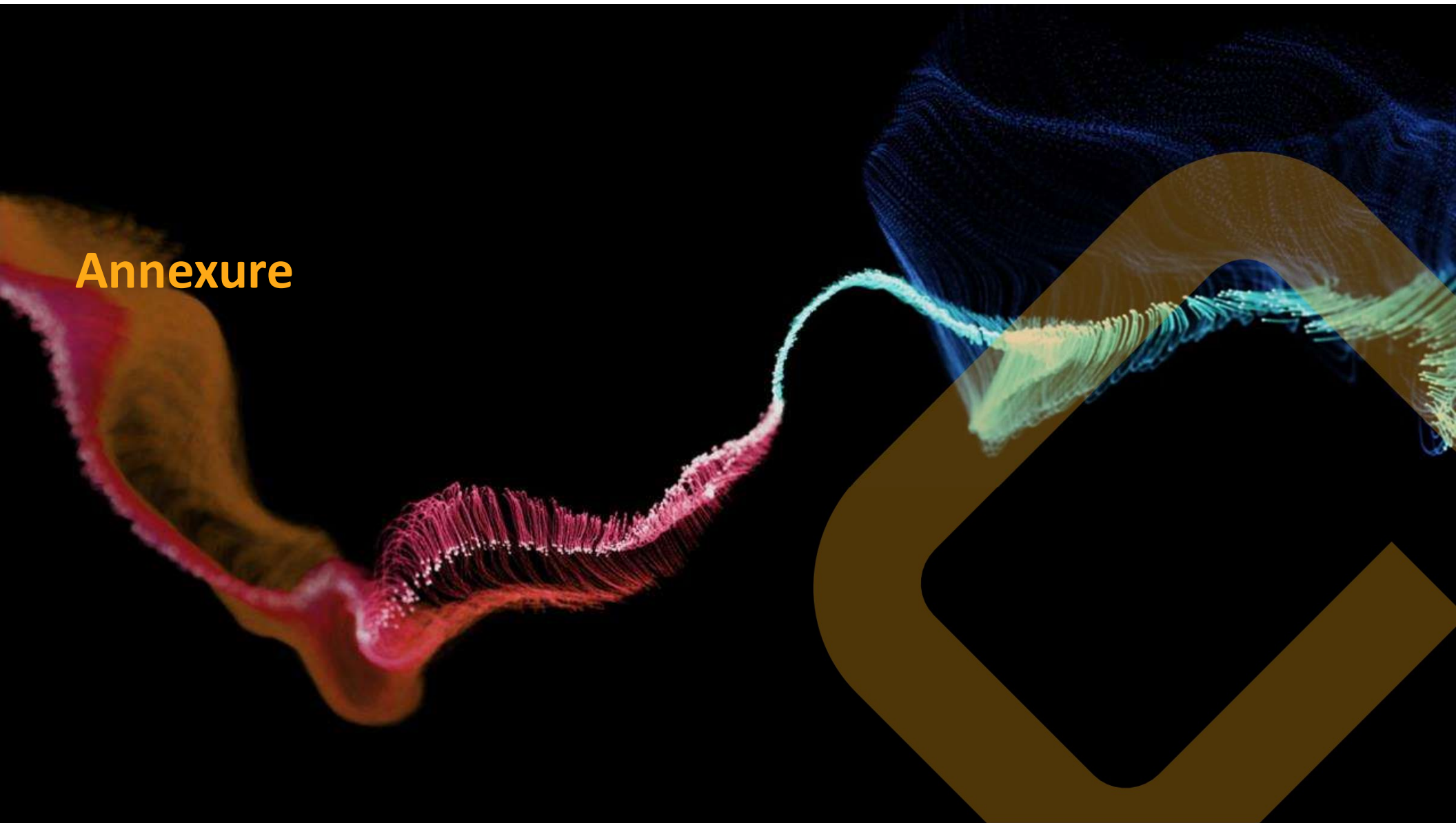


Committed to a strong balance sheet with < 2x leverage for bolt-on acquisitions



Continue to be a “Great Place To Work”

Annexure





## Income Statement

digitide

Particulars ( in ₹ Cr)	Q2 FY25	Q1 FY26	Q2 FY26	QoQ	YoY	H1 FY25	H1 FY26	YoY
Revenue from operations	714	736	764	4%	7%	1,410	1,500	6.4%
Employee benefits expense	515	549	555	1%	8%	1,010	1,105	9.4%
Other expenses	96	104	124	19%	29%	192	228	18.5%
EBITDA	103	83	85	3%	-18%	208	168	-19.4%
EBITDA Margin %	14.5%	11.2%	11.1%	-8bps	-332bps	14.8%	11.2%	-358bps
Depreciation & amortisation	48	46	51	10%	6%	95	97	1.5%
Finance Cost	10	11	13	17%	29%	20	24	23.9%
Other Income	-1	-4	-4	11%	185%	-5	-8	54.5%
Exceptional Items	-1	9	14			-18	23	
PBT	47	20	12			116	32	
Tax	23	10	9	-15%	-61%	36	19	-47.3%
PAT	25	10	3			80	12	
PAT Margin %	3.5%	1.3%	0.4%	-96bps	-311bps	5.7%	0.8%	-485bps
Adj PAT	24	19	17			62	35	
Adj PAT Margin %	3.4%	2.5%	2.2%	-34bps	-120bps	4.4%	2.4%	-204bps

Note: YoY nos. are unaudited

## Balance Sheet

Particulars ( in ₹ Cr)	As on 31st Mar 25	As on 30th Sep 25
<b>Assets</b>		
PPE, CWIP and Other intangibles	219	223
Right-of-use assets	261	342
Goodwill	213	217
Other non-current assets	134	141
<b>Non-current assets</b>	<b>826</b>	<b>922</b>
Trade receivables and Unbilled	555	690
Cash and cash equivalents	184	77
Other current assets	157	176
<b>Current assets</b>	<b>896</b>	<b>942</b>
<b>Total Assets</b>	<b>1,722</b>	<b>1,865</b>
<b>Equity and Liabilities</b>		
<b>Total Equity</b>	<b>912</b>	<b>921</b>
Borrowings-non current	5	5
Lease liabilities-non-current	190	267
Other non-current liabilities	39	48
<b>Non-current liabilities</b>	<b>235</b>	<b>320</b>
Borrowings-current	58	45
Lease liabilities-current	100	111
Other current liabilities	416	467
<b>Current liabilities</b>	<b>574</b>	<b>623</b>
<b>Total Equity and Liabilities</b>	<b>1,722</b>	<b>1,865</b>

**Cash**

**₹ 77 Cr**

**Debt**

**₹ 49 Cr**

**Net Cash**

**₹ 28 Cr**

**Borrowings to  
Equity**

**0.05:1**

**DSO**

**82**

**Billed: 49  
Unbilled: 33**

## Cashflow statement

Particulars ( in ₹ Cr)	H1 FY26
<b>Cash flows from operating activities</b>	
<b>Profit after tax</b>	<b>13</b>
Non Cash Expenses/ (Income)	168
Changes in operating assets and liabilities	-114
<b>Cash generated from operations</b>	<b>66</b>
Income taxes paid	-26
<b>Net cash flows from operating activities (A)</b>	<b>40</b>
<b>Cash flows from investing activities</b>	
Capex (net)	-44
Interest received	4
Bank Deposits/ Mutual funds	1
Profit on sale of PPE	0
<b>Net cash from / (used in) investing activities (B)</b>	<b>-39</b>
<b>Cash flows from financing activities</b>	
Repayments of Borrowings	-14
Proceeds/(repayments) from/(of) leases	-77
Payment of dividend to non-controlling interest of subsidiary	-12
Interest paid	-6
<b>Net cash from / (used in) Financing activities (C)</b>	<b>-108</b>
<b>Net increase /(decrease) in cash and cash equivalents (A+B+C)</b>	<b>-107</b>
Cash and cash equivalents at the beginning of the period	184
<b>Cash and cash equivalents at the end of the period</b>	<b>76</b>



*For any queries please contact:*

**Suraj Prasad**

Chief Financial Officer

*E: [Investorrelations@digitide.com](mailto:Investorrelations@digitide.com)*

**Rajesh Lachhani**

Head of IR & M&A

*E: [Rajesh.Lachhani@Digitide.com](mailto:Rajesh.Lachhani@Digitide.com)*

**2025**