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
Digitally signed by NEERAJ MANCHANDA
Date: 2025.11.04 21:44:12 +05'30'

Neeraj Manchanda
Company Secretary & Compliance Officer
Membership No. A20060

Encl:- as above

Digitide Solutions Ltd

Q2 FY26 Investor Presentation

4 November 2025

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Contents

Journey So Far

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

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2007 - 13
QUESS

Promoter investments
- **Ajit Isaac**, Founder and Chairman of Quess
- **Fairfax Group**, Canada

2014 - 18

M&A-led entry into Tech and BPM Services
- Enters **North American IT services market** in 2014
- Enters **North American P&C Insurance market** in 2016
- Augments **digital engineering** capabilities in 2017
- Majority stake in **2nd largest India-to-India CX player**

2019 - 2024
Quess GTS

Singular business platform
- Majority stake in **India's leading payroll platform provider** (ALLSEC)

2025-
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Independent AI-first tech services company
- Carved out the tech, digital and BPM services as a **listed company**

	FY14	FY18	FY'25
Revenue	$44M	$163M	$342M
#Employees	0.5k	27k	55k
#Delivery centers	2	34	41
IP in production	-	7	24

10+ Years of legacy

300+ customers

56k+ Employees

50+ Proprietary AI accelerators

5+ Countries

10+ Digital COEs

40+ Global locations

71.3 Best-in-class NPS

Great Place to Work® 6 consecutive years

20+ Technology partners

Note: 1$=84 INR conversion rate

Established and diversified business with proven scale

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Our service lines

Digital and AI Engineering

- Digital Engineering
- App Implementation and MS
- Infra and Cloud Services
- Cybersecurity Services

AI, Data and Analytics

- Data modernization
- Data hub (proprietary)
- Conversational AI chatbots
- 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

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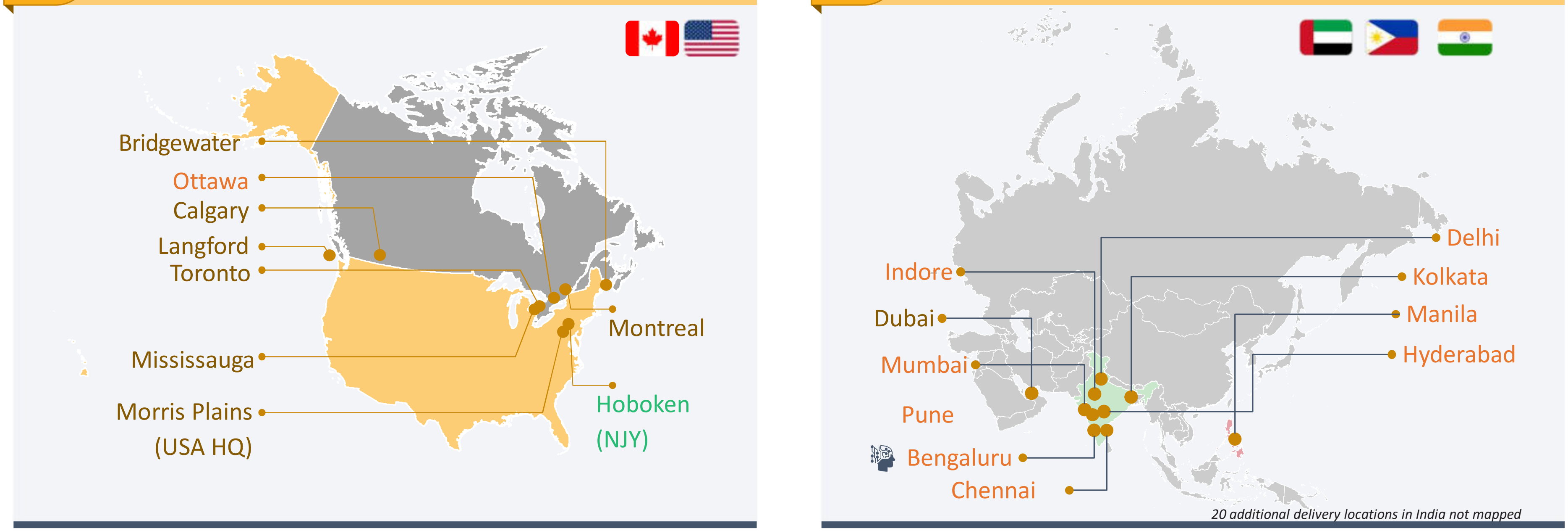
40+ locations spread across 5 countries

North America: 9+ locations across 2 countries

Offshore: 30+ locations across 3 countries



Key delivery center   Business center   Data center   AI Center of Excellence

Financial Highlights

Highlights Q2 FY26

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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	₹ 736 Cr QoQ ▲ 0.4% | YoY ▲ 6%	₹ 764 Cr QoQ ▲ 4% | YoY ▲ 7%	₹ 1,500 Cr YoY ▲ 6.4%
EBITDA	₹ 83 Cr *Margin 11.2%* QoQ ▲ *4bps*	₹ 85 Cr *Margin 11.1%* QoQ ▼ *8bps*	₹ 168 Cr *Margin 11.2%* YoY ▼ *358bps*
Adj PAT*	₹ 19 Cr *Adj PAT 2.5%* QoQ ▼ *136bps*	₹ 17 Cr *Adj PAT 2.2%* QoQ ▼ *34bps*	₹ 35 Cr *Adj PAT 2.4%* YoY ▼ *199bps*
PAT	₹ 10 Cr *PAT 1.3%* QoQ ▲ *150bps*	₹ 3 Cr *PAT 0.4%* QoQ ▼ *96bps*	₹ 12 Cr *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)

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Financials

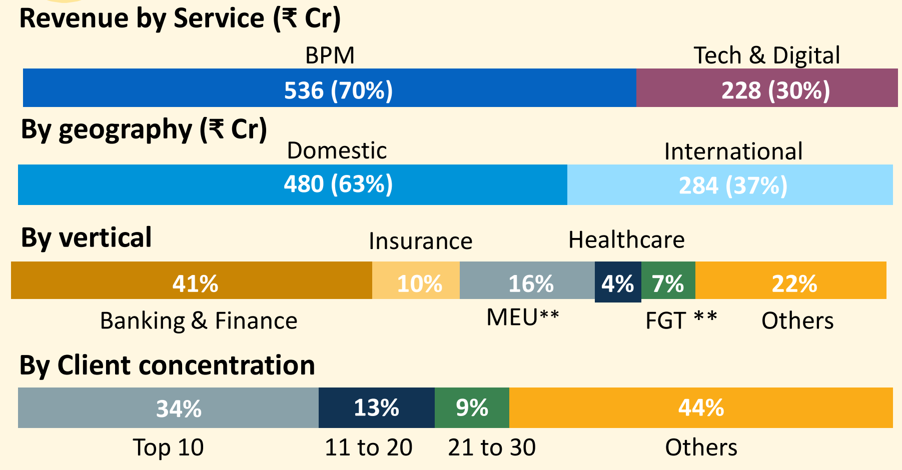
In ₹ Cr	Q1 FY26	Q2 FY26	QoQ	YoY
Revenue	**736**	**764**	***4%***	***7%***
EBITDA	83	85	*3.1%*	*-17.6%*
EBITDA %	***11.2%***	***11.1%***	***-8bps***	***-332bps***
Adj PAT	19	17	*-10.2%*	*-28.7%*
Adj PAT %	***2.5%***	***2.2%***	***-34bps***	***-109bps***
PAT	10	3	*-71.6%*	*-88.9%*
PAT %	***1.3%***	***0.4%***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

Segment Overview

Revenue (Mix)	Q1 FY26		Q2 FY26		QoQ	YoY
	₹ Cr	*Mix*	₹ Cr	*Mix*		
BPM	539	*73%*	536	*70%*	*-1%*	*1%*
Tech & Digital	197	*27%*	228	*30%*	*16%*	*23%*
Total	**736**	*100%*	**764**	*100%*	*4%*	*7%*

Segment EBITDA*	Q1 FY26		Q2 FY26		QoQ	YoY
	₹ Cr	*EBITDA %*	₹ Cr	*EBITDA %*	change	change
BPM	90	*16.7%*	84	*15.6%*	*-104bps*	*-87bps*
Tech & Digital	19	*9.6%*	22	*9.6%*	*4bps*	*-193bps*
Total	**109**	*14.8%*	**106**	*13.8%*	*-94bps*	*-137bps*

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



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**

Note:
*Segment EBITDA is excluding unallocated corporate cost. YoY nos. are unaudited
**MEU = Manufacturing, Energy and Utility & FGT = Fast Growth Tech

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

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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

Segment EBITDA*	H1 FY25 ₹ Cr	H1 FY25 *EBITDA %*	H1 FY26 ₹ Cr	H1 FY26 *EBITDA %*	YoY 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

Well-defined 3x3x3 strategy

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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

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Digitide's AI Centre of Excellence: Pulse.AI

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

From domestic BPM-focused…

$342M
FY25 Revenue

12%
CAGR (FY22-25)

FY25 Revenue by service

BPM	Tech & Digital
251 (73%)	92 (27%)

By geography

Domestic	International
221 (64%)	122(36%)

By vertical

BFS	Insurance	Mfg	Healthcare	FGT	Others
44%	10%	11%	5%	7%	24%

…to international tech & digital-focused

$1,000M
FY31 Revenue

18%+
CAGR (FY25-31)

FY31 Revenue by service

BPM	Tech & Digital
600-650 (~60%)	350-400 (~40%)

By geography

Domestic	International
450-500 (~50%)	500-550 (~50%)

By vertical

BFS	Insurance	Mfg	FGT	Healthcare	Others
30-35%	15-18%	8-10%	8-10%	12-15%	16-18%

Note:$1 = INR 84 conversion rate

Our guiding principles

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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

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

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

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

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For any queries please contact:

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2025