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Adisoft Technologies Limited

H2 FY26 Investor Presentation

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Engineering Intelligent Manufacturing Solutions

Incorporated in Pune in 2013, **Adisoft Technologies Limited** is an industrial digital automation company with 13+ years of experience, offering automated assembly lines, robotic work cells, material handling systems, special purpose machines (SPMs) and Industry 4.0 solutions. The company integrates shop-floor equipment and processes with the IT layer to reduce human intervention, supported by in-house design, development, assembly and testing capabilities. It serves automotive, automotive OEM, packaging & printing, pharmaceutical and other industrial sectors.

The Company got listed on NSE Emerge in April, 2026

Core Values

- Customer Centric
- Ethical Business practices
- Global standards
- Focus on Design Engineering & Success by Design

Vision

We would be digital transformation experts, providing cutting-edge automation solutions to all businesses worldwide. We must form worldwide strategic alliances with all stakeholders, including clients, vendors, technology partners, and investors. Adisoft Technologies Limited. must delight our clients by delivering perfection via the adoption of global quality standards and methods and an efficient delivery ecosystem.

Mission

Adisoft Technologies Limited. is on a mission to provide cost-effective, next-generation digital transformation and cutting-edge automation solutions to all global organizations in the shortest possible development time.

Company at a Glance

13+
Years of Expertise

950+
Customers Served

1,000+
Installations

ISO 9001:2015
Certified

200+ Employees

Facilities: 12,000 sq.ft. Assembly unit, MIDC Bhosari Pune ; **new 70,000 sq. ft.** plant under construction

Reach: Presence across **10+ states** in India; exports to **Bangladesh** and **Bahrain**

Core Offering: Turnkey automation including assembly lines, robotics, Special Purpose Machines (SPMs), vision systems & IoT

Differentiator: Integration of IT/ERP with the shop floor through full-stack Industry 4.0 solutions

₹169.33 Cr ▲ +26.7% **Total Income FY26** Consolidated	**₹32.84 Cr** ▲ +42.4% **EBITDA FY26** Margin **19.4%**	**₹22.80 Cr** ▲ +42.9% **Net Profit FY26** Margin **13.5%**	**31.52%** ROE FY26 **34.72%** ROCE FY26

From Industrial Automation to Industry 4.0 Solutions

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2013
Incorporated in Pune as an industrial automation engineering company

2018
Scaled across automotive shops — weld, assembly, paint & engine lines

2021
Tripartite JV with AIOI Systems Co. (Japan) — 24% stake in AIOI Systems India

2023
Crossed Revenue of ₹75 crores

2025
First export deliveries (Bangladesh, Bahrain); Converted to Public Limited Company

2026
Listed on NSE Emerge;
New Pune Facility Under Construction;
ISO 9001:2015 Certified

What Adisoft Does — From Shop Floor to IT Layer

Shop-floor Equipment

PLCs, robots, sensors, machines, conveyors integrated on the line

Control & Connectivity

SCADA, GOT, IoT interfaces enable real-time monitoring & traceability

IT / MES layer

Seamless link to ERP & Manufacturing Execution Systems

Outcome

Higher productivity, quality & uptime; fewer defects and recalls

Automation Solutions

~71% (*Revenue Contribution FY26)*

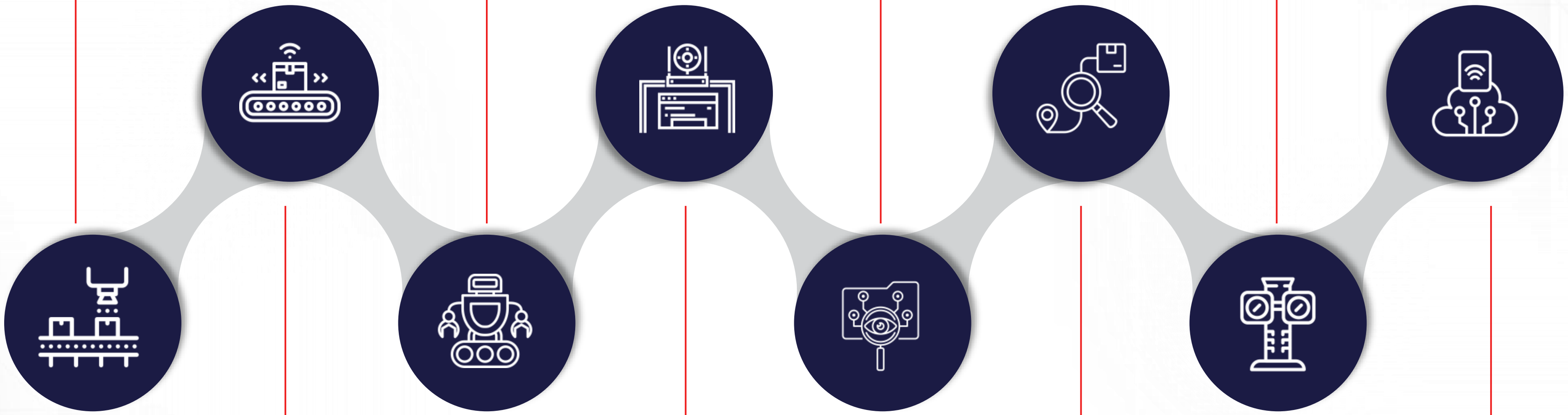
End-to-end, project-based turnkey systems: design, build, install, commission and lifecycle support (AMC, retrofitting, upgrades).

Trading of Automation Products

~29% *(Revenue Contribution FY26)*

Supply of industrial automation products (PLC, HMI, servo, drives) and digital-picking system components that complement project work.

Product & Solution Portfolio



Automated Assembly Lines
Custom lines for high-volume manufacturing

Material Handling & Smart Conveyors
Intelligent movement and line balancing

Robotic & Cobot Work Cells
Pick-and-place, sealing, welding cells

Special Purpose Machines (SPMs)
Built to client-specific requirements

Vision-Based Inspection (AI)
Robot/cobot AI inspection & validation

Tracking & Traceability
Assembly / weld / paint traceability

Poka-Yoke, Torque & Quality Control
Error-proofing and torque tracking

IoT / Digitisation & Utility Monitoring
Centralised cockpit, MES connectivity

Core Automation Solutions

Material Handling & Smart Conveyors

Smart Conveyors

Tracking Systems

Pika Pika Systems

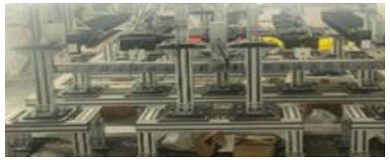
Poka Yoke System Racks

Cordless Limit Wrench Wireless Transmitter And Receiver-based System

Vision Based Systems

Production Control Systems

Rocker Arm and Cap Cam Inspection



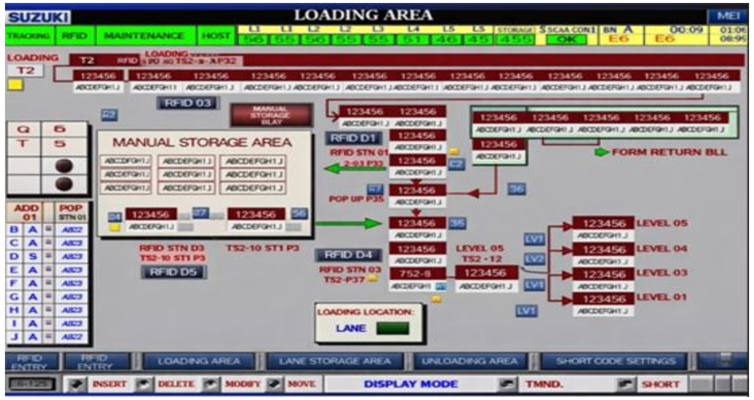
PVC Coating Machine

CNG Plate Counting Machine

Tyre & RIM Inspection Machine

Digital & Smart Factory Solutions

Quality Control System – Parameter Checking	Jig Fixture	Tracking System



Traceability System	Smart Conveyors	Utility Monitoring & Controlling

Industry Presence & Growth Opportunities

End-Market Presence

- Automotives
- Automation Industries
- Packaging & Printing
- Municipal Corporation
- Pharma

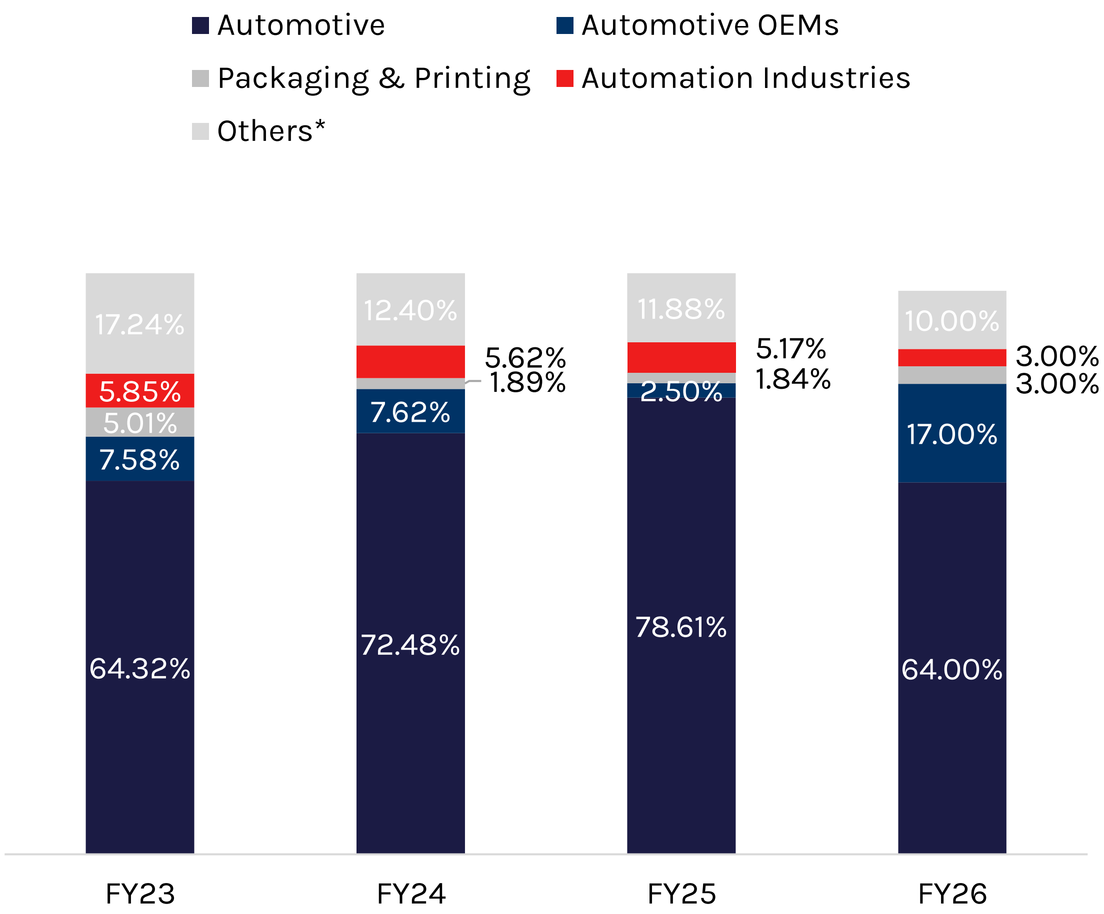
Emerging Growth Segments

- Pharma Manufacturing & Packaging Systems
- White Goods and Consumer Durables
- Warehouse Automation and Intelligent Material Handling Systems
- Water Treatment Plants (WTP, STP, RO) and Process Automation Solutions

Deep In Automotive — Diversifying Beyond

Automotive & OEMs anchor the business with mission-critical, repeat automation. The same engineering is now being deployed into higher-growth non-automotive verticals.

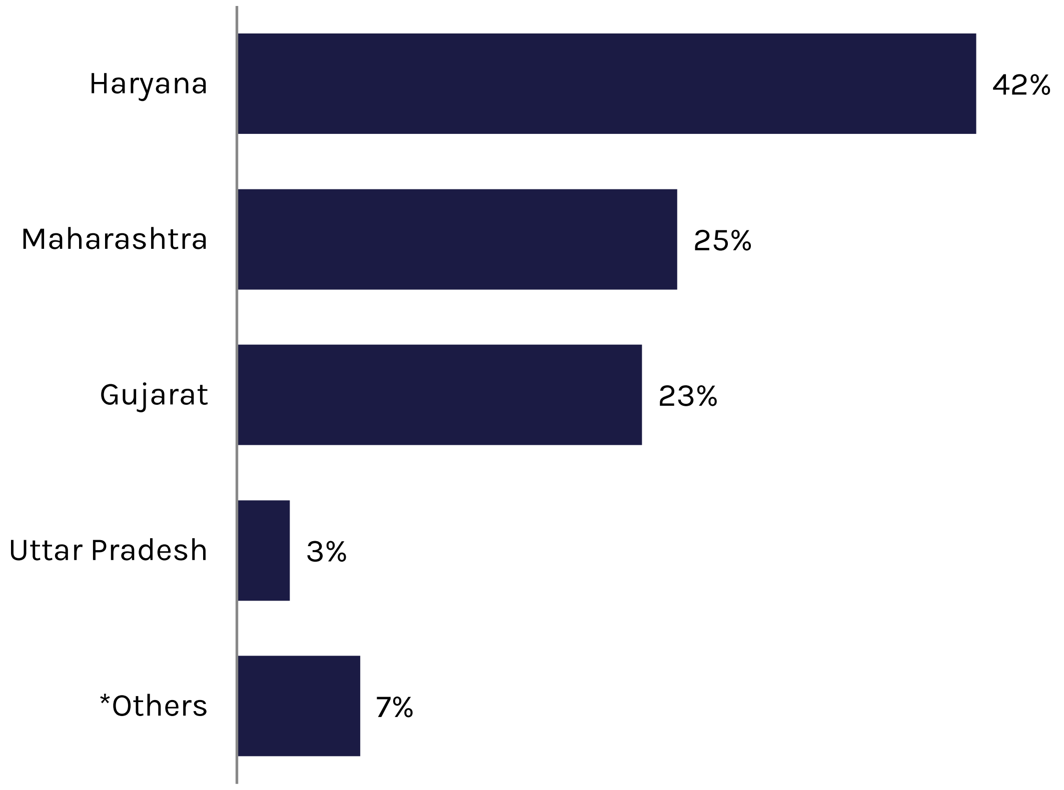
Industry Wise Revenue Bifurcation



**Other Industries includes Utility, Steel, Textile, Consultancy, Smart City and Urban Mobility , Pharmaceuticals, Agriculture etc.*

Geographic Footprint & Expansion

State Wise Revenue Bifurcation



Operations across **10+ states** demonstrate the Company's ability to execute projects at scale, while revenue from established industrial hubs provides a solid foundation for future geographic expansion.

Pan-India Delivery Footprint

Project deliveries across Maharashtra, Haryana, Karnataka, Gujarat, Goa and Uttar Pradesh, anchored by automotive clusters in the north and west. Adisoft intends to expand to additional states with the new facility.

Going Global

- Exports delivered to Bangladesh and Bahrain (FY25 / H2 FY26)
- Exploring more export opportunities

Capacity Step-Up: New Pune Facility

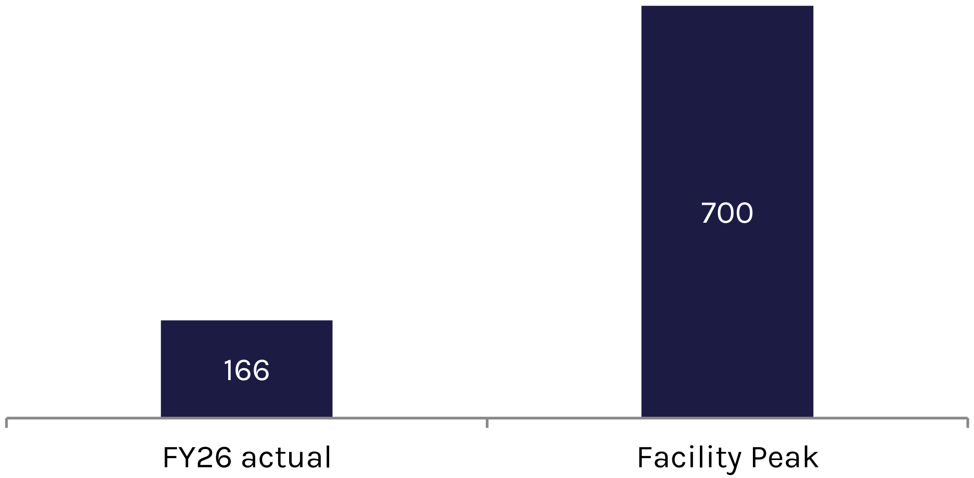
30,000 sq ft
Land Parcel,
Bhosari (Pune)

70,000 sq ft
Built-up
Integrated Facility

₹37.8 Cr
Capex Funded
From IPO Proceeds

Operational from November 2026 *(Expected)*
Fully integrated (design + software + assembly) by March 2027 — enables larger, more complex, multi-segment orders.

Revenue Runway (₹ Cr, Indicative)



"Peak" reflects 650–700 Cr potential over ~5 years

Funded & De-risked

Capex met from IPO proceeds; current operations at peak utilisation due to space and manpower constraints — the new plant unlocks the next growth phase. Management targets debt-free status by the end of FY27.

Growth Engines & Revenue Visibility

Order Book & Pipeline

Order book of ~₹96 Cr (as of July 2026), with an active pipeline of ~₹56 Cr and ~₹40 Cr already converted into the order book.

Repeat & Higher-value Orders

Redeployable solutions and larger repeat orders lift margins.

New Products & Verticals

Vision, robotics, traceability and poka-yoke seeing strongest demand; new sectors broaden the funnel

Management Ambition
(Forward-looking)

~25%	**>30%**	**13–14%**	**~5 yrs**
Revenue growth target, FY27	Growth potential, FY28	PAT margin, sustainable	To optimally utilise new plant

Growth Drivers Supporting the Next Phase of Expansion

Capacity Expansion

New 70,000 sq ft Pune facility (₹37.8 Cr) — production from H2 FY27, peak potential ₹650–700 Cr

Diversify Beyond Automotive

Scale pharma, white goods, warehouse / e-commerce and water-treatment automation

Expand Smart Factory Solutions

Focus on vision systems, traceability, poka-yoke and Industry 4.0 solutions to enhance profitability.

Expand International Presence

Targeting international opportunities to scale

Differentiated Capabilities Driving Competitive Advantage

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In-house Design & Engineering

49-member D&D team; E-PLAN, SolidWorks, AutoCAD; full design lifecycle

Integrated Assembly & Testing

Single-roof MIDC Bhosari facility — quality control and faster delivery

IT–shop-floor Integration

Niche capability spanning all manufacturing shops

Loyal, Diversified Customers

Trusted by market leaders in their respective segments for 10+ years; presence across 10+ states.

Experienced Promoters

28 years of automation leadership; deep OEM relationships

Channel Partnerships & JV

Leading Channel partner for Mitsubishi Electric India and the AIOI Systems (Japan) joint venture

Built to Win

Adisoft's differentiation lies in the smart-factory domain — integrating IT and ERP systems with shop-floor machines. Its niche solutions span every shop and are mission-critical and trusted.

IT to Shop floor integration

Most peers serve a single shop (press, weld, paint or assembly).
Adisoft's solutions apply across all of them — wider addressable scope per customer.

Trust in mission-critical systems

These systems control entire shops — errors mean recalls and warranty loss. Customers stay with proven, trustworthy integrators.

Proprietary, in-house IP

Complete design and software built in-house; reusable, redeployable solution library that improves margins with every repeat order.

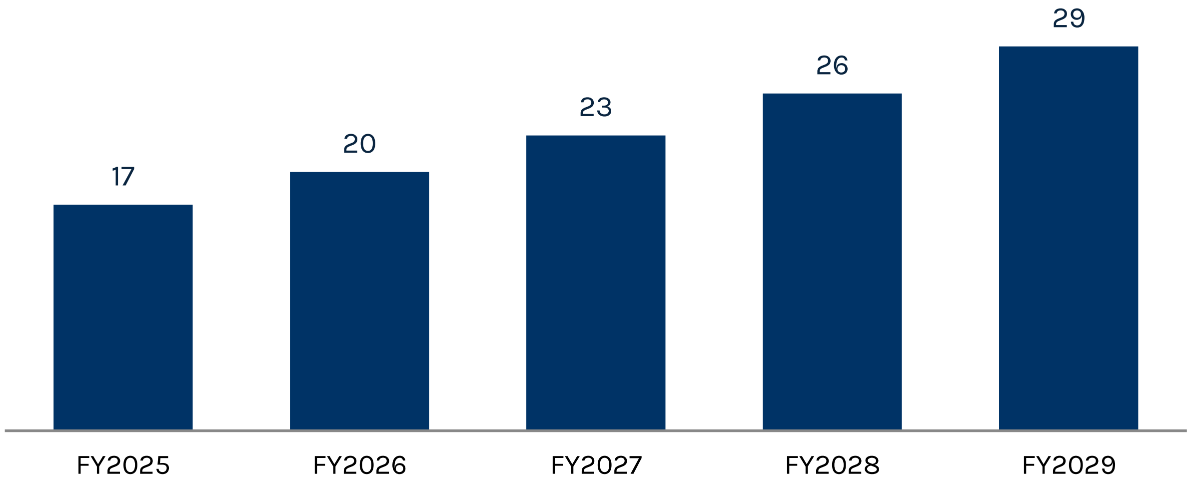
India Industrial Automation — A Structural Growth Market

14.26%
Projected CAGR
India automation, to FY2029

US $29.4 Bn
Market by FY2029
India Industrial Automation

~1.7x
Market Expansion
FY25 → FY29

India industrial automation market (US$ bn, at 14.26% CAGR)



Trajectory shown applies the stated CAGR
Source: investindia.gov.in, innovateindia.mygov.in

What's driving demand

- Manufacturers investing in smart factories, robotics and process automation for productivity and quality
- Industry 4.0, IIoT and machine connectivity becoming mainstream on the shop floor
- Government push: Make in India, PLI schemes and a National Strategy on Robotics targeting an India robotics hub by 2030
- Localisation and industrial-infrastructure build-out accelerating automation adoption

Robotics Adoption — Early Innings, Long Runway

6th
India’s rank globally
Annual robot installations

9,120
Robots installed (2024)
+7% YoY — record (IFR)

~5–7
Robots / 10,000 workers
Far below global average

How Industry Trends Map To Adisoft’s Capabilities

INDUSTRY TREND
Automotive leads robot adoption (~45% of installs)

Adisoft: Deep automotive franchise — assembly, weld, paint & traceability

INDUSTRY TREND
Low robot density = huge automation headroom

Adisoft: Full-stack integrator positioned for first-time adopters

INDUSTRY TREND
Robot Installations at Record High

Adisoft: Well positioned to capitalize on India's accelerating automation investments.

INDUSTRY TREND
India's Automation Headroom Remains Significant

Adisoft: Expanded engineering and manufacturing capabilities to capitalize on long-term automation opportunities.

Indusstry Data Source: ifr

Case Study: Production Monitoring & Smart Factory Operations

Real-Time Production Monitoring with Automated Andon System

Client
Major Two & Four-Wheeler Automotive Manufacturers

Challenge
The customer required real-time visibility into production performance to quickly identify equipment malfunctions, material shortages and process interruptions across the assembly line.

Adisoft's Solution
Implemented an **Automated Andon System** that continuously monitors production, compares planned versus actual output and instantly generates visual and audible alerts whenever abnormalities occur, enabling operators to take immediate corrective action.

Business Impact
- Real-time production monitoring
- Faster response to production issues
- Improved production visibility
- Enhanced overall line efficiency

Material Handling Machines/ Smart Conveyors

Smart Conveyors

Tracking Systems

Case Study: Automated Compliance & Production Traceability

Automated CNG Compliance Plate Printing

Client
Well Known Automotive Client

Challenge
Manual compliance plate marking increased the possibility of data-marking errors and limited production traceability.

Adisoft's Solution
Developed an **Automated CNG Compliance Plate Printing Machine** that automatically identifies the vehicle, prints the required compliance data and verifies the information using a vision-based camera before releasing the plate for vehicle installation.

Business Impact
- Error-free compliance plate marking
- Improved production traceability
- Faster production cycle time
- Automated verification before installation

Case Study: AI-Driven Quality Inspection

AI-Enabled Vision Inspection System

Client
Automotive Manufacturer

Challenge
The customer required accurate inspection of critical components while reducing manual inspection and improving quality assurance.

Adisoft's Solution
Designed an **AI-enabled Vision Inspection System** integrating industrial cameras, advanced image processing algorithms and collaborative robots to inspect components, validate dimensions, detect defects and automatically classify inspection results with complete digital traceability.

Business Impact
- Automated quality inspection
- Improved defect detection
- Complete digital traceability
- Supports continuous quality improvement

Case Study: Digital Traceability Across the Production Line

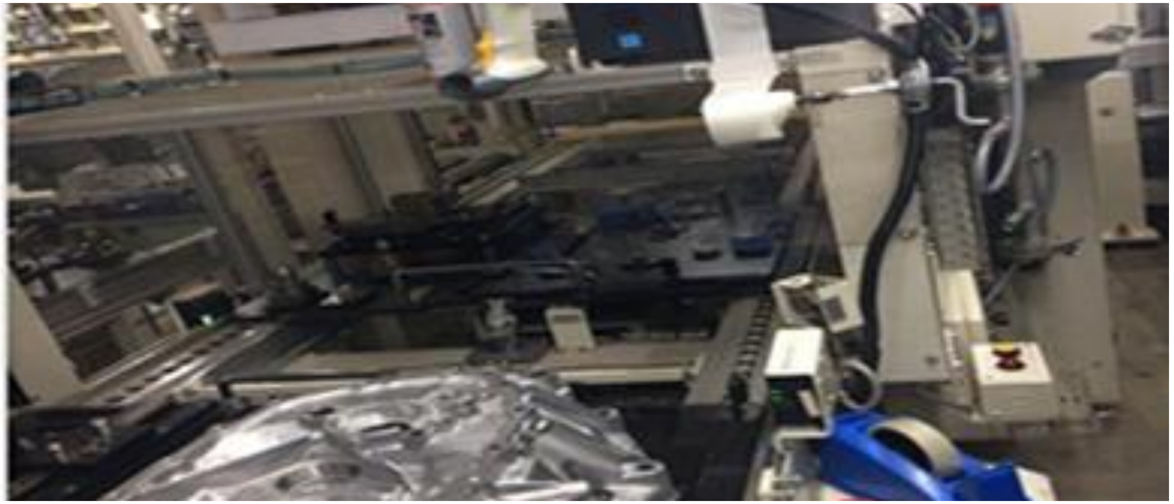
RFID-Based Digital Traceability

Client
Automotive Engine & Transmission Manufacturer

Challenge
The customer required complete digital traceability and accurate model verification throughout the manufacturing process while eliminating manual data entry.

Adisoft's Solution
Implemented an **RFID-Based Traceability System** where RFID tags containing model-specific production data are automatically read and verified at every workstation, ensuring each process corresponds to the correct model throughout the assembly line.

Business Impact
- Complete component traceability
- Eliminated manual data entry
- Improved process reliability
- Accurate model verification across the assembly line



Traceability System

The Vision Behind Adisoft

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Ajay C. Prabhu

Chairman & Managing Director

First-Generation Entrepreneur | Automation Strategist | Industry 4.0 Leader

- **Founded Adisoft Technologies** with the vision of enabling smarter manufacturing through innovative industrial automation solutions, laying the foundation for a technology-driven engineering enterprise.
- **Holding a Bachelor of Engineering (Electronics)** and backed by over **28 years of industry experience**, he has guided the Company from a niche automation engineering business to a trusted provider of integrated automation and Industry 4.0 solutions for leading manufacturers.
- **Passionate about engineering excellence and customer-centric innovation**, he has cultivated a culture focused on delivering reliable, mission-critical automation solutions that address complex manufacturing challenges.
- His strategic leadership has strengthened Adisoft's technology capabilities through global collaborations while driving innovation across robotics, machine vision, digital manufacturing and smart factory solutions.
- He continues to lead the Company's long-term vision with a focus on technology leadership, operational excellence and creating sustainable value for customers and stakeholders.

Board of Directors & Executive Management

Board of Directors

Ajay C. Prabhu
Chairman & Managing Director
28+ Years of Experience

Preeti A. Prabhu
Promotor | Whole-Time Director
12+ Years of Experience

Shashikant Magdum
Non-Executive Director
38+ Years of Experience

Key Managerial Personnel

Mayura Darvekar
Chief Financial Officer
14+ Years of Experience

Vaibhav Salunke
Company Secretary & Compliance Officer
3+ Years of Experience

Ajit Salvi
Senior Manager
15+ Years of Experience

H2 & 12 M FY26 Key Performance Highlights

Stellar Debut Year — 27% Income Growth, 350 Bps H2 EBITDA-margin Expansion, Profit Up ~43%

₹169.3 Cr ▲ +26.7%

Total Income

12M FY26 · vs ₹133.7 Cr 12M FY25

₹32.8 Cr ▲ +42.4%

EBITDA

Margin 19.4% (+214 bps)

₹22.8 Cr ▲ +42.9%

Net Profit

Margin 13.5% (+153 bps)

₹119.7 Cr ▲ +46.6%

H2 FY26 Income

vs ₹81.7 Cr H2 FY25

₹17.5 Cr ▲ +79.5%

H2 FY26 PAT

Margin 14.6% (+268 bps)

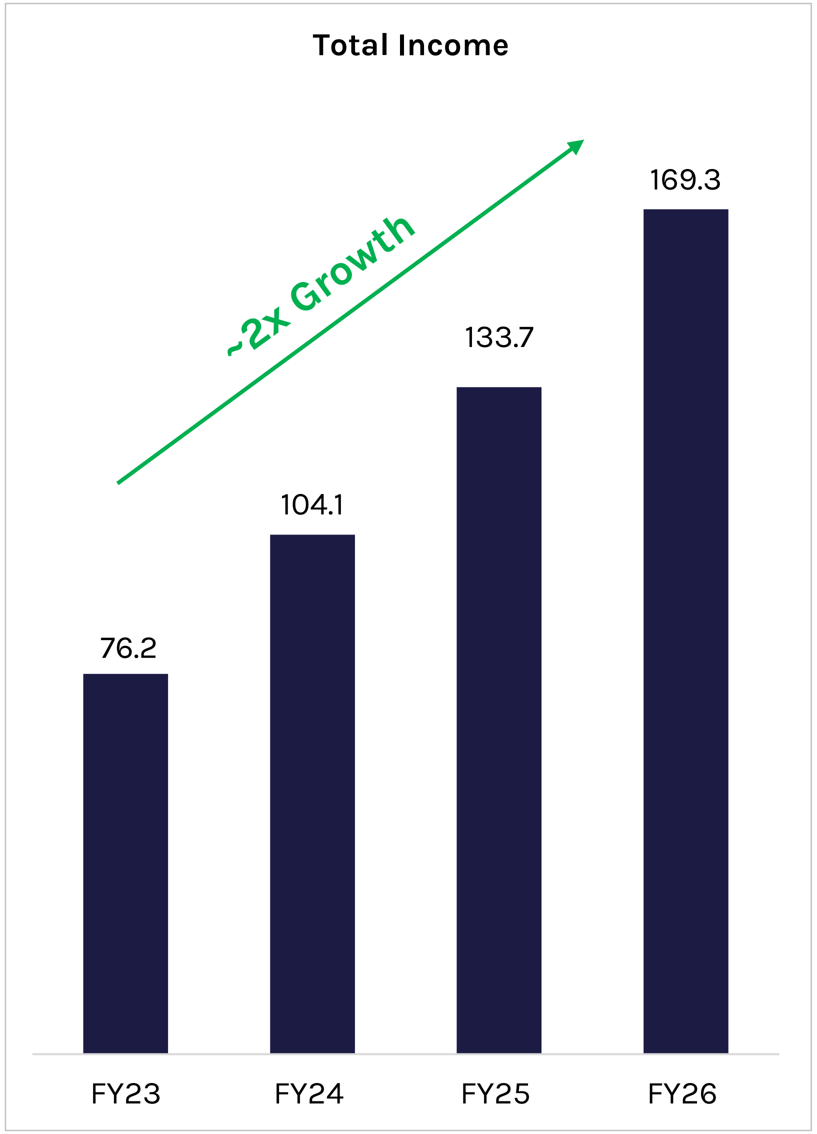
₹19.09 ▲ +41.9%

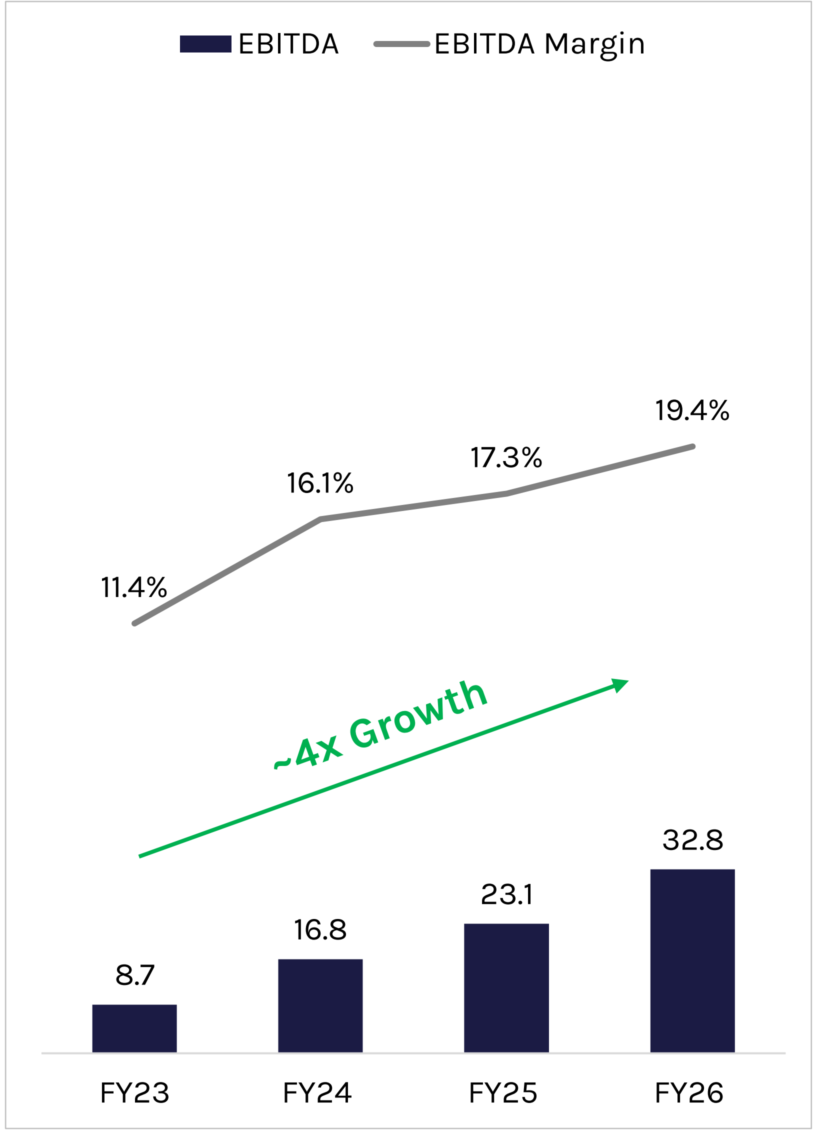
Diluted EPS FY26

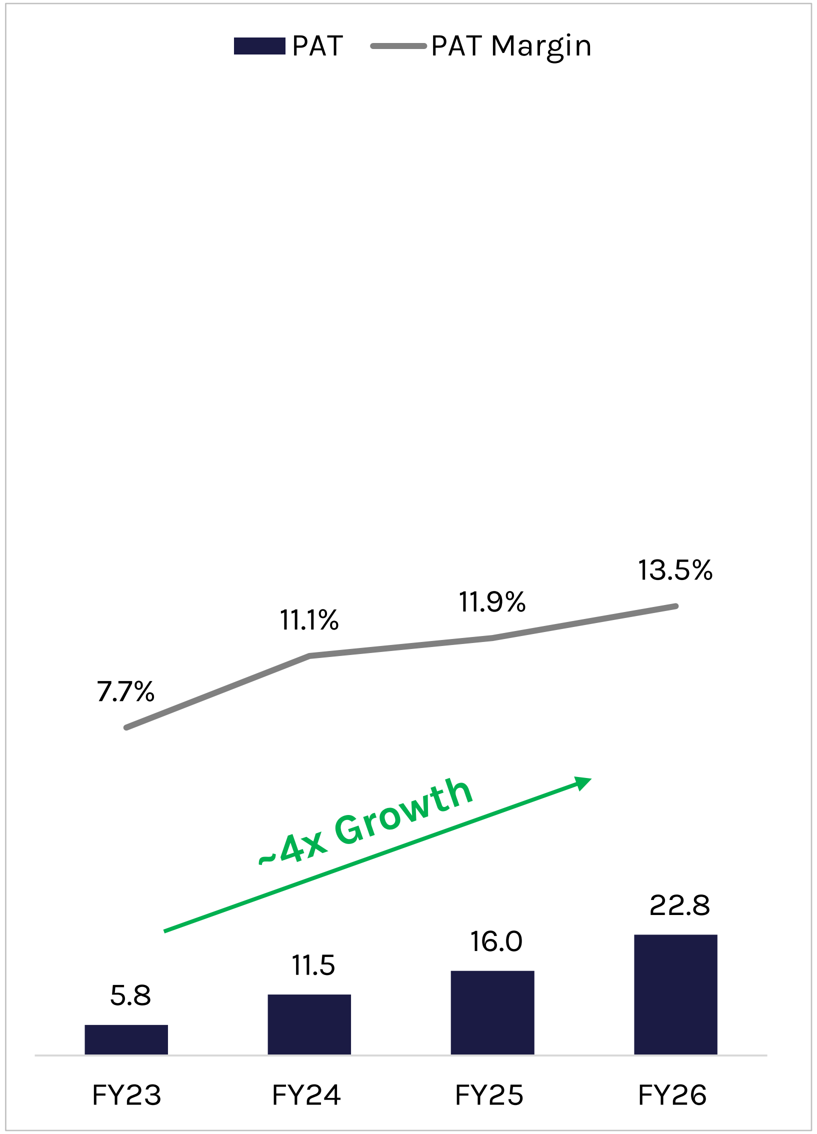
vs ₹13.45

Multi-Year Financial Performance - Consolidated

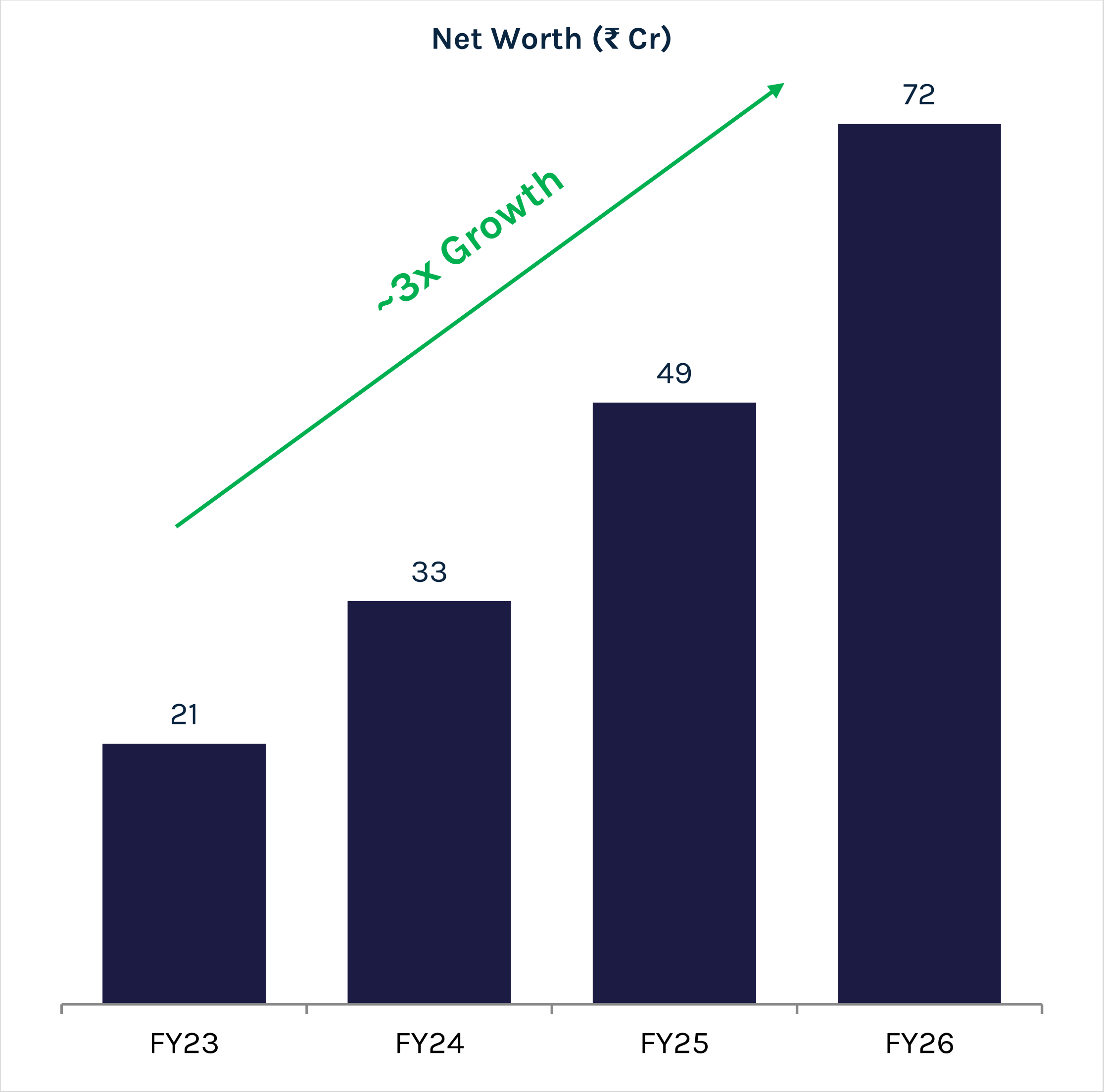
(In ₹ Crore & Margins In %)







Balance Sheet & Capital Structure



₹72.3 Cr — **Net Worth FY26**
vs ₹49.4 Cr

0.30x — **Debt / Equity**
from 0.58x FY25

₹29.4 Cr — **Cash & bank**
FY26

18.2x — **Interest cover**
FY26

Strengthened balance sheet post-IPO. IPO proceeds (₹74.1 Cr) fund the new facility, debt repayment and working capital; D/E nearly halved and management targets a debt-free position within ~2 years.

Profit & Loss Statement and Cash Flow Statement

(Rs. In Crore except %)

ParticularsFY22	FY26	FY25	FY24	FY23
Revenues	166.4	130.3	103.3	75.5
Other Income	2.9	3.4	0.9	0.6
Total Income	**169.3**	**133.7**	**104.1**	**76.2**
Raw Material Expenses	111.4	90.6	71.5	54.3
Employee costs	12.8	9.8	6.9	5.5
Other expenses	12.3	10.2	8.9	7.7
Total Expenditure	136.5	110.6	87.4	67.5
EBITDA	**32.8**	**23.1**	**16.8**	**8.7**
EBITDA Margin (%)	**19.4%**	**17.3%**	**16.1%**	**11.4%**
Finance Costs	1.8	1.4	0.9	0.7
Depreciation	0.2	0.2	0.1	0.1
PBT	30.8	21.5	15.7	7.9
Exceptional item	0.0	0.0	0.0	0.0
PBT after exceptional item	30.8	21.5	15.7	7.9
Tax	8.0	5.5	4.2	2.0
Net Profit	**22.8**	**16.0**	**11.5**	**5.8**
PAT Margin (%)	13.5%	11.9%	11.1%	7.7%

Particulars				
Cash from Operation	17.3	-0.8	-6.4	3.0
Cash from Investments	-3.0	0.9	0.0	-1.4
Cash from Financing	-8.7	9.1	7.1	1.1
Net Cash Flow	**5.7**	**9.2**	**0.7**	**2.7**

Balance Sheet

(Rs. In Crore except %)

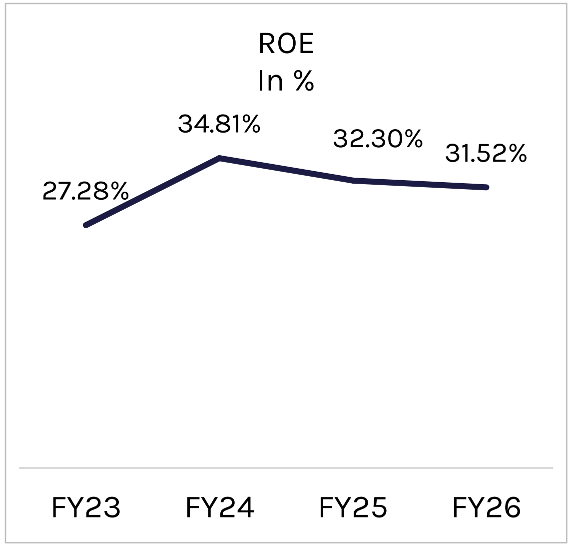
Equities & Liabilities	FY26	FY25	FY24	FY23
Equity	12.0	0.0	0.0	0.0
Reserves	60.3	49.4	33.1	21.4
Non Controlling Interests				
Net Worth	**72.3**	**49.4**	**33.1**	**21.4**
Non Current Liabilities				
Non Current Borrowings	0.0	5.7	3.4	4.2
Lease Liabilities	0.0	0.0	0.0	0.0
Deferred Tax Liability	0.0	0.0	0.0	0.0
Long Term Provision	1.2	0.6	0.4	0.3
Total Non Current Liabilities	**1.2**	**6.3**	**3.8**	**4.5**
Current Liabilities				
Current Borrowings	21.6	22.7	14.8	5.9
Lease Liabilities	0.0	0.0	0.0	0.0
Trade Payables	44.3	27.2	27.8	15.4
Current Tax Liabilities (Net)	0.0	0.0	0.0	0.0
Short Term Provisions	8.7	6.3	1.5	0.8
Other Current Liabilities	5.7	5.0	2.3	1.6
Total Current Liabilities	**80.3**	**61.2**	**46.3**	**23.8**
Total Liabilities	**153.9**	**116.9**	**83.3**	**49.7**

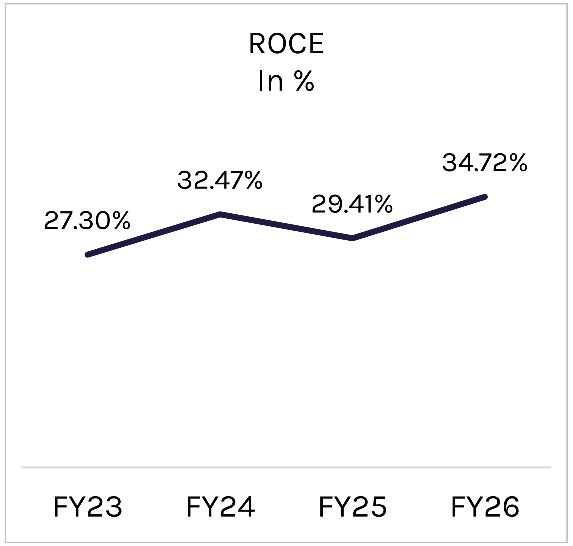
Assets	FY26	FY25	FY24	FY23
Non Current Assets				
Fixed assets	13.0	10.4	10.4	10.3
Non Current Investments	1.7	1.5	1.4	1.1
Other Non Current Financial Assets	0.0	0.0	0.0	0.0
Deferred Tax Assets (Net)	0.5	0.3	0.1	0.2
Other Non Current Assets	0.6	0.6	4.6	9.9
Total Non Current Assets	**15.7**	**12.8**	**16.5**	**21.5**
Current Assets				
Inventories	16.7	16.5	13.9	9.2
Trade receivables	82.5	56.1	40.5	13.7
Cash & Bank Balance	29.4	23.8	10.4	3.9
Other Current Financial Assets	8.2	6.3	0.9	0.9
Current Tax Assets (Net)	0.0	0.0	0.0	0.0
Other Current Assets	1.5	1.3	1.1	0.5
Total Current Assets	**138.2**	**104.1**	**66.8**	**28.2**
Total Assets	**153.9**	**116.9**	**83.3**	**49.7**

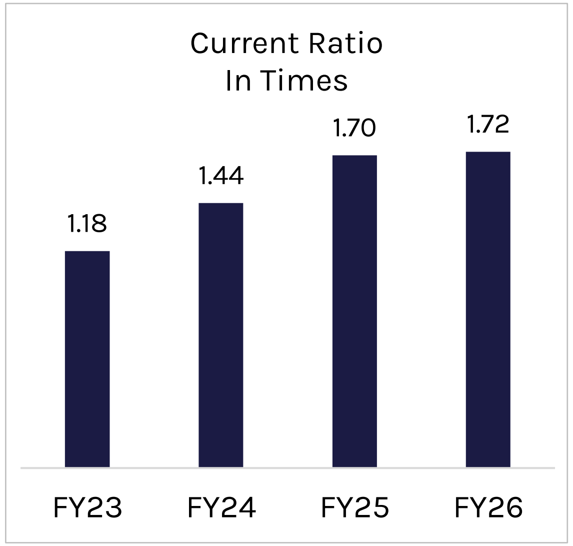
Notes

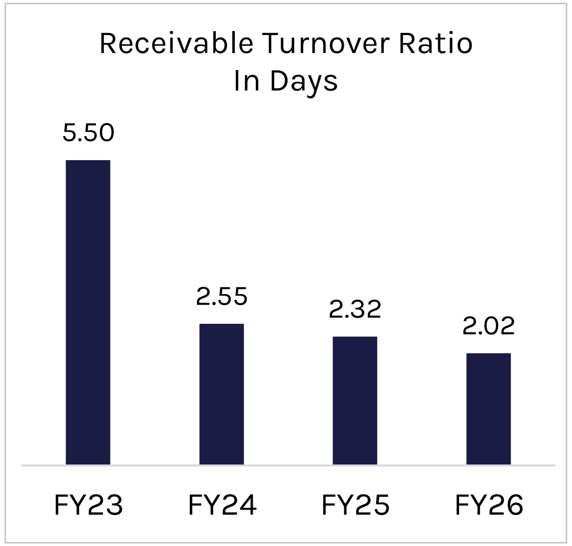
Historically, ATL's business is heavy in second half of any financial year the general mix between first half and second half being 30-35% and 65-70%. Hence, Trade receivables always appear high on balance sheet date of any year. However, 90% of the receivables are usually received in 45 days of billing.

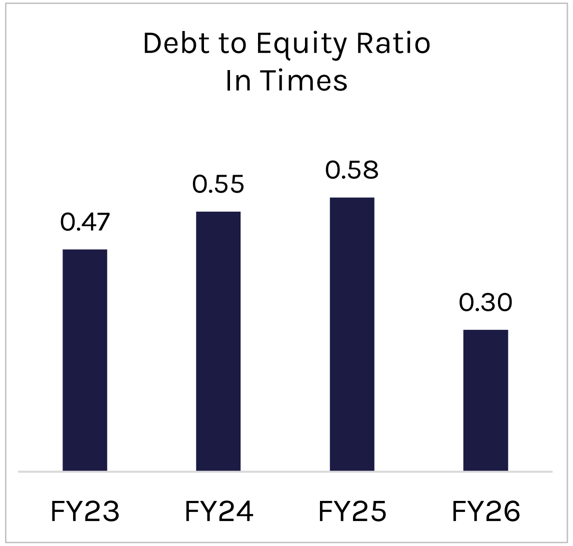
Key Financial Ratios - Consolidated

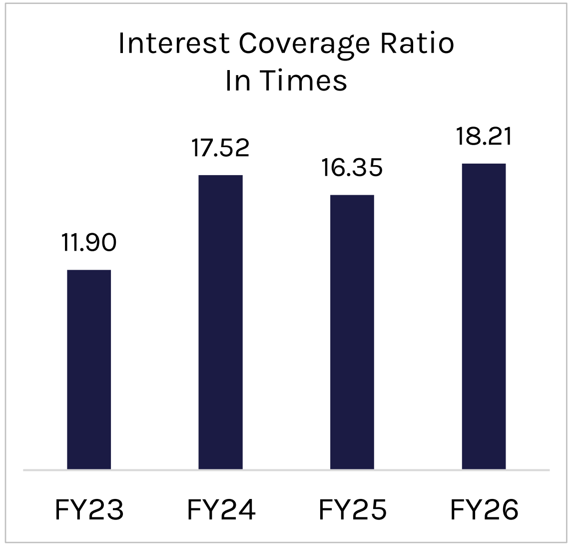


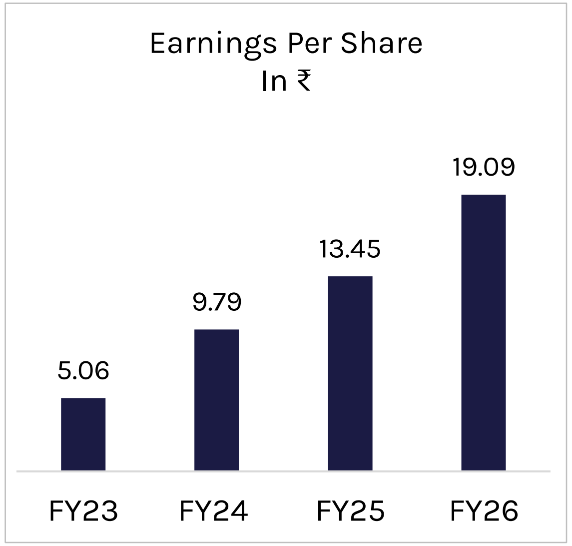


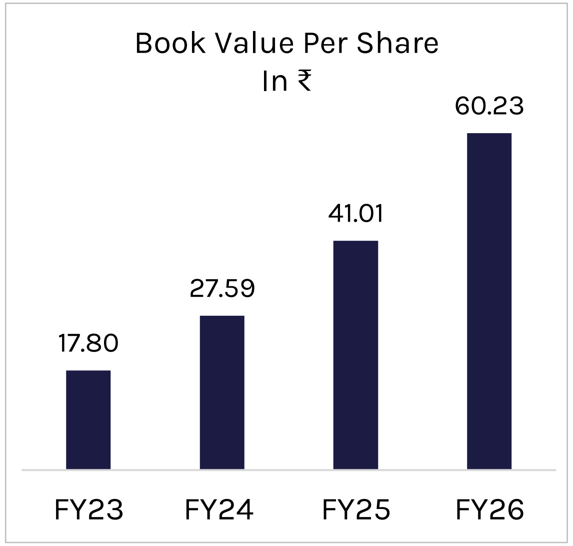












Competitive Benchmarking

Company (NSE)	Revenue (₹ Cr)	PAT Margin	ROE	P/E	Mkt Cap (₹ Cr)
Adisoft Technologies	**166 (FY26)**	**13.5%**	**31.5%**	**14.0x**	**336**
Patil Automation	150 (FY26)	10.10%	27.3%	23.6x	406
Affordable Robotic & Automation	118 (FY26)	5.9%	6.60%	30.7x	159

Most Profitable

Highest PAT margin and ROE in the peer set

Fastest-scaling

~30% revenue CAGR, FY23–FY26

Reasonably Valued

Lowest P/E despite the strongest profitability

Source: NSE / BSE

Investment Rationale

Differentiated Integrator

Niche IT-shop-floor integration across all manufacturing shops

Structural Tailwinds

India automation ~14% CAGR; low robot density; policy support

Profitable, Compounding Growth

~30% revenue CAGR with expanding EBITDA & PAT margins

Strong, Clean Balance Sheet

D/E 0.30x, 18x interest cover, debt-free ambition, no litigation

Capacity-led Runway

New plant unlocks ₹650–700 Cr revenue potential over ~5 years

Aligned, Experienced Promoters

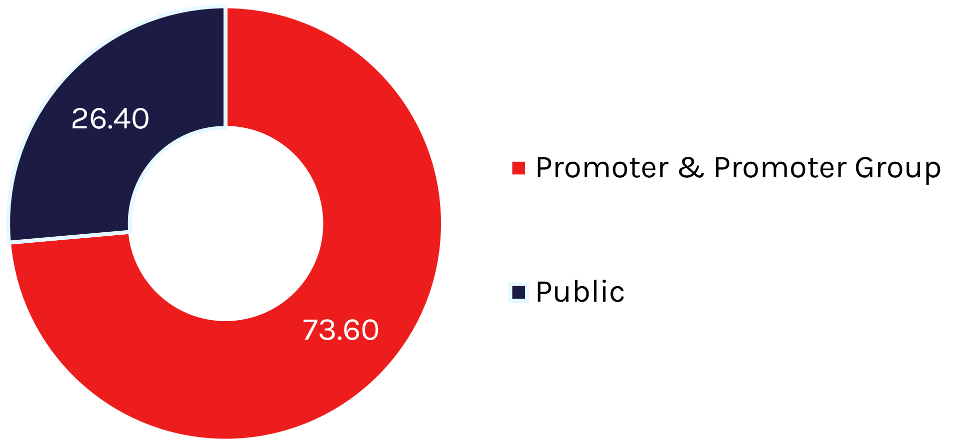
73.6% promoter holding; 28 years of automation leadership expertise

Stock Data

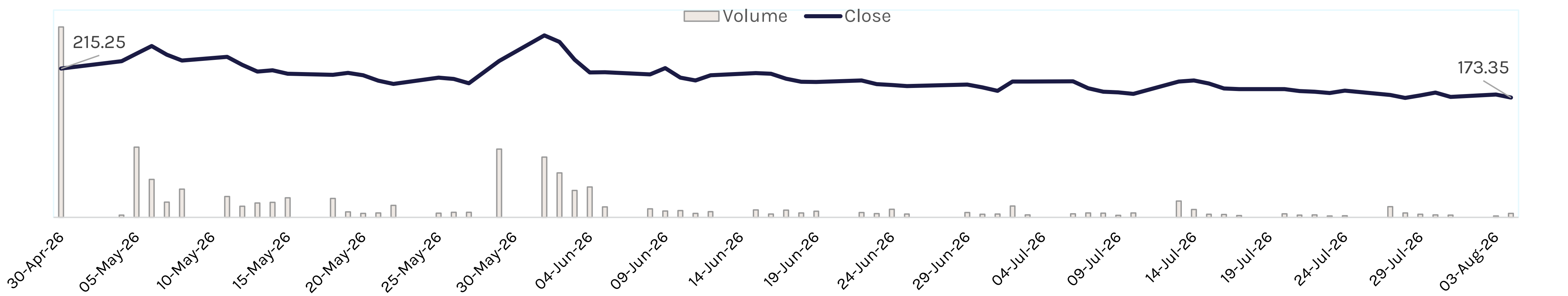
As on 5-08-2026

NSE – ADISOFT - INE20PL01012	
Share Price (₹)	178.95
Market Capitalization (₹ Cr)	292.01
No. of Shares Outstanding	1,63,18,113
Face Value (₹)	10.00
52 Week High-Low (₹)	280.00/170.00

Shareholding Pattern



Share Performance From April 30, 2026 Till August 04, 2026



Thank You

Registered office & Head Office:
Adisoft Technologies Limited,
PRATHAMESH COMPLEX, Plot no :- BG-102 to BG 105, Above Union Bank, Opp. Century Enka company Telco Bhosari road, Pune – 411026.

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