

UNIPARTS INDIA LTD.

August 08, 2025

BSE Limited Phiroze Jeejeebhoy Towers Dalal Street, Mumbai – 400 001 Scrip Code: 543689	National Stock Exchange of India Limited Exchange Plaza, C-1, Block G Bandra Kurla Complex Bandra (E), Mumbai – 400 051 Symbol: UNIPARTS
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Subject: Regulation 30: Presentation on Standalone and Consolidated Unaudited Financial Results of the Company for the quarter ended June 30, 2025

Dear Sir/Madam,

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find attached herewith a copy of the Presentation on Standalone and Consolidated Unaudited Financial Results of the Company for the quarter ended June 30, 2025.

The same is also being uploaded on website of the Company at https://www.unipartsgroup.com/home/quarterly_financial_results.

You are requested to take the above on record.

Thanking You,

Yours faithfully,

For Uniparts India Limited

Jatin Mahajan
Head Legal, Company Secretary and Compliance Officer

Encl: As above



Uniparts India Limited

Addressing the core needs of the **WORLD**.
Precision **DELIVERED**, Performance **ASSURED**

*Leveraging engineering competencies and
a global delivery model*

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Content



Q1FY26 Performance



Business Overview



Annexures



Management's Message



Mr. Gurdeep Soni

Promoter, Chairman & Managing Director

We have started FY 2026 on a strong footing, driven by the successful execution of our core strategies and our teams' focused efforts. We continue to deepen our integration with key customers, expand our nearshoring footprint and have a healthy new business award book of over INR 200cr. These achievements underscore the strength of our customer relationships and our ability to win market share even in a complex macro environment. Our dual shoring manufacturing model continues to be an advantage allowing us to navigate market volatility and provide our global customers with a more resilient supply chain.


While the tariffs have created some volatility in the US off highway industry, there are early signs of recovery in Europe and rest of the world. Along with the tariffs we remain watchful of the global interest rate and the farm income environments as these are key indicators of industry recovery.

Mr. Paramjit Singh Soni

Promoter, Vice Chairman and Executive Director



Operating Environment Update



Construction: The global construction equipment segment is showing signs of stabilisation with an outlook of flat to slightly declining markets. Our growth is fuelled by strengthened relationships with global leaders in this segment and new business wins in Europe and other regions.

Large Ag: The large agriculture market, particularly the US remains under pressure with major OEMs projecting high double digit decline. However, thanks to early recovery signs in Europe and our new business wins, we are confident in our ability to outperform the market and are targeting about a 20% growth in this segment.

Small Ag: A favorable monsoon and steady farmer demand are expected to drive tractor sales growth of 4-7% in FY26 in India. Globally, OEMs project flat to slightly declining sales, with Europe and Asia Pacific expected to perform better than the US markets. With a strong presence in this segment, Uniparts is well positioned to capitalise on this growth.

Aftermarket: This segment grew 20% in FY 2025 and remains a growth driver for us. Following our new partnership with the second largest farm retail stores in the USA this growth position has solidified.



Key Takeaways from Q1FY26

Total Revenue

Rs 2,792 Mn

5.2% (YoY)



EBITDA

Rs 578 Mn

25.7% (YoY)



PBT

Rs 447 Mn

34.3% (YoY)

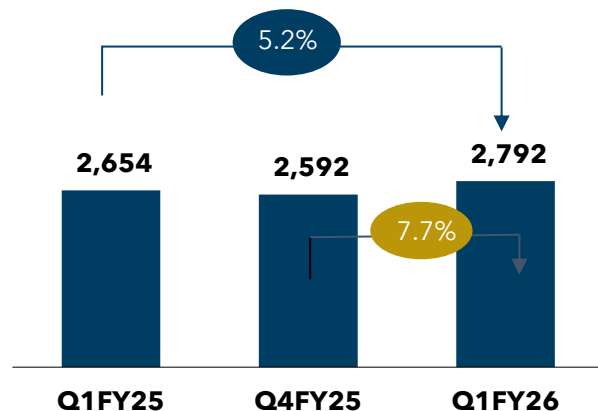


PAT

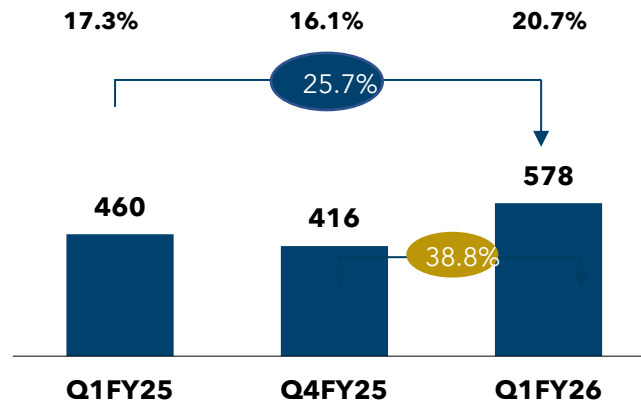
Rs 345 Mn

38.5% (YoY)

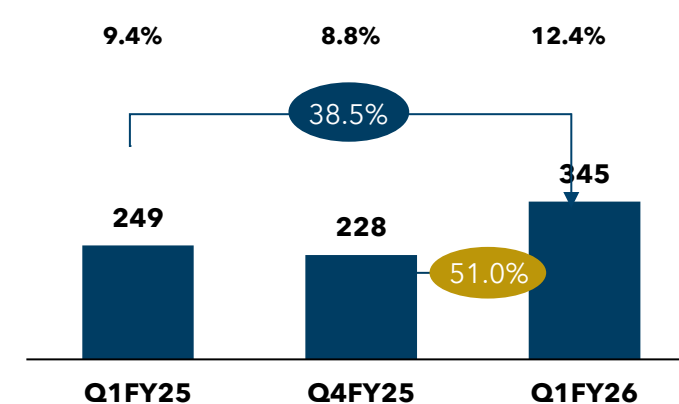
Total Revenue



EBITDA & Margins (%)



PAT & Margins (%)

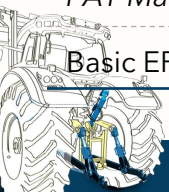


Note: Total Revenue, EBITDA, PBT and PAT include other income



Q1FY26 Results (Consolidated)

Figures in INR Mn	Q1FY26	Q4FY25	Q1FY25	QoQ Change	YoY Change
Revenue from Operations	2737	2528	2612	8.3%	4.8%
Other Income	55	64	42		
Cost of materials consumed (including change in inventory)	941	964	985		
Gross Profit Margin (As % of Revenue from Ops)	65.6%	61.8%	62.3%		
EBITDA	578	416	460	38.9%	25.7%
EBITDA Margin(%)	20.7%	16.1%	17.3%		
Operating EBITDA (EBITDA - Other Income)	523	353	417	48.2%	25.4%
Operating EBITDA Margin(%) (As % of Revenue from Ops)	19.1%	14.0%	16.0%		
Depreciation & Amortization Expense	111	109	107		
EBIT	467	307	353	52.1%	32.3%
EBIT Margin(%)	16.7%	11.8%	13.3%		
Finance Cost	20	19	21		
PBT	447	288	332	55.2%	34.6%
Tax Expense	102	60	83		
PAT	345	228	249	51.3%	38.5%
PAT Margin(%)	12.3%	8.8%	9.4%		
Basic EPS (Rs.)	7.6	5.1	5.5		



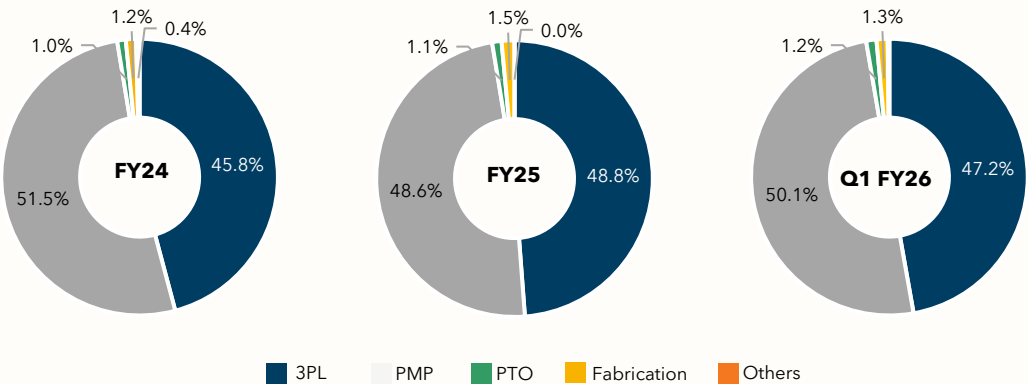
Revenue Distribution

Leading Presence in the Manufacture of 3PL and PMP Products Globally

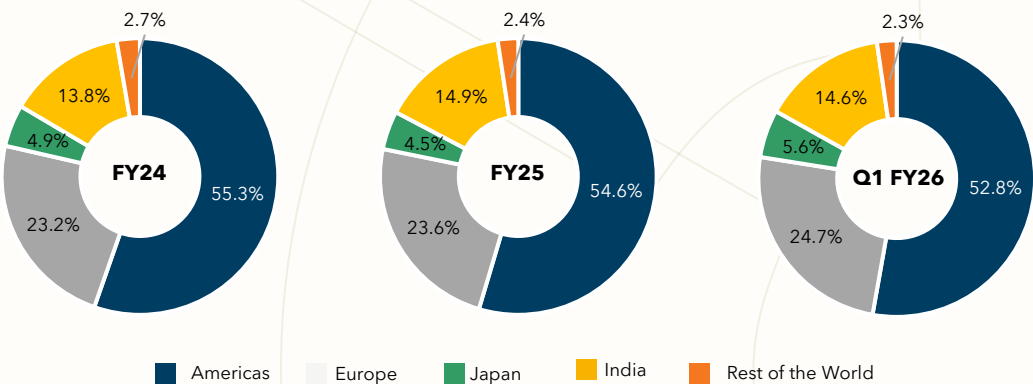
Healthy Revenue Mix

INR Mn, Segment revenue as % of finished goods sales

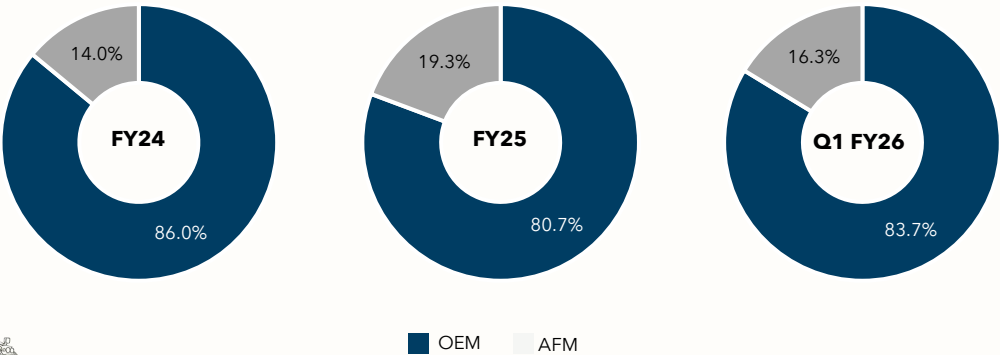
Product Vertical



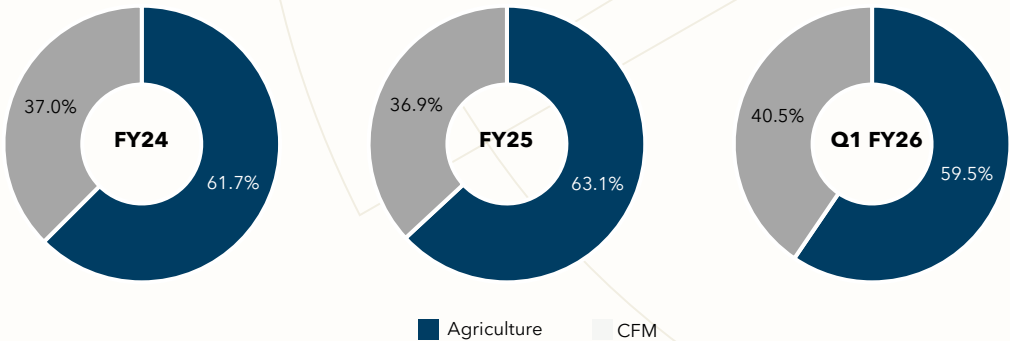
Geographical Presence



Market Presence



Segmental Presence



Content



Q1FY26 Performance



Business Overview



Annexures



Product Categories



Three Point Linkage



Precision Machine Parts



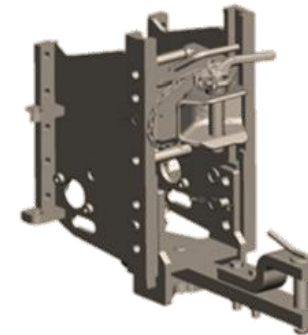
Power Take Off



Fabrication



Hydraulic Cylinders



Note: We do small and medium scale Fabrication, PTO (Power Take-off) and Hydraulic components

Leading Global Supplier of Critical Components Solutions

3 Point Linkage - Revenue Contribution*: 47%

- Tractor specific designed and validated system.
- Allows for quick and easy attachment and detachment of implements.
- Allows for the balanced operation of the implement, improves efficiency, and reduces operator fatigue.



Market leaders in small tractor (<70 HP) linkage system globally.

Precision Machined Parts - Revenue Contribution*: 50%

- High-quality and reliable components for use in construction machinery, equipment, and structures.
- These parts are made to tight tolerances and durability to withstand the tough operating environment of OHVs.



Leading global supplier in fragmented market with manufacturing base in India and US and servicing all major geographies (Americas, Europe, Japan, India, ROW).

Precision Manufacturing

Higher Complexities

High No. of SKUs

Healthy Margins

**\$1
billion+**
Market Size

**Customers
serviced**
Customers
serviced

25+
Countries
covered in sales

*Revenue contribution is based on FY25 finished goods sales

Additional Synergistic Offerings to Extend System Boundaries

Power Take Off (PTO)



Description

Device used to drive implements such as rotary tillers, mowers and other equipment requiring a mechanical drive by the tractor.

Key Highlights

Focused on producing PTO for the agriculture sector which allows the transfer of power from the tractor to the implement.

Features

International safety norm compliance

Hydraulic Cylinders



Used as actuators to move mechanized components, by generating linear motion along an axis.

Synergies with existing activities in the 3PL application and hydraulic lift of tractors. Significant demand in international markets, due to increased mechanization.

High cleanliness norm specifications.

Fabrication



Large structural parts and chassis such as hitch frames, A-frames, front-end loader parts, grain lifters and engine frames.

Synergetic to products and vehicles currently serviced

- Provides superior finish
- Varied size designs

Deepen wallet share

Extended offerings in adjacent areas on the same OHVs for existing customers by offering integrated system solutions

Large Addressable Market

Estimated Market Size of ~\$10 billion; Establish new customer base by addressing growing markets of UTVs etc

More Value Per Vehicle

Leveraging manufacturing expertise to diversify the product portfolio and move up the value chain

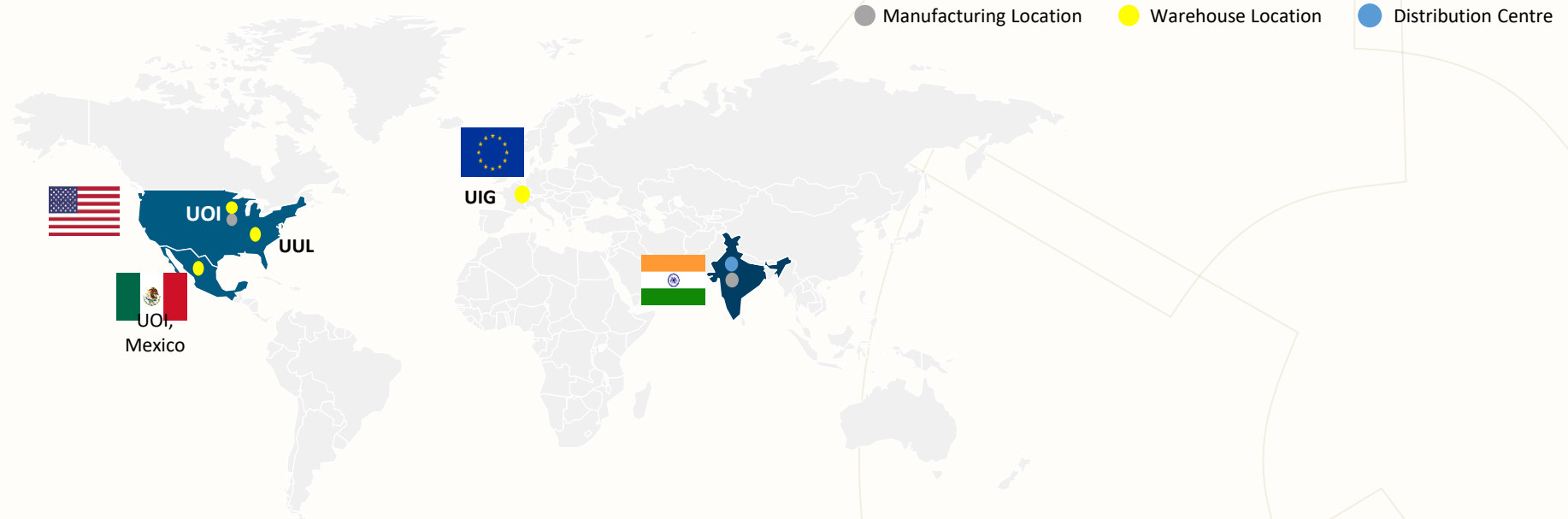
Healthy Margin Profile

Margins remains in the range of 17% to 20%



Warehouse and Manufacturing Facilities

Dual Shore Manufacturing & Warehousing Solutions



7 Manufacturing Facilities

6 in India; 3 in Ludhiana;
2 in Noida
1 in Visakhapatnam; 1 in US

4 Warehouses

2 in US; 1 in Europe;
1 in Mexico

67,320

Metric tonne per annum
Aggregate installed capacity*

400 kilonewton

Test rig capability

Delivery options

Tailored to customer specifications

1 Distribution Facility in India

Facilities in Close Proximity to Customers Ensuring



Cost effectiveness



Quicker delivery



Faster turnaround time

Global Delivery Model De-Risks Clients' Supply Chain

Dual Shore Delivery Model

	Local Delivery	Direct Export	Warehouse Sales
Model specification	<ul style="list-style-type: none"> Manufactured and delivered in same geography 	<ul style="list-style-type: none"> Manufactured in India for export around the world 	<ul style="list-style-type: none"> Products stocked in warehouse for offtake
Model features	<ul style="list-style-type: none"> Shorter lead times Flexible batch sizes 	<ul style="list-style-type: none"> Competitive pricing Longer lead times Longer inventory cycle 	<ul style="list-style-type: none"> Just in Time delivery from local warehouse Customized packing and lot sizes Lower inventory cycle for customers



Servicing all **10 leading Global OHV OEMs** in Agriculture and half of the leading **10 players** in the **CFM Segment***.



UIL has market leadership in supplying key systems and components like 3PL and PMP for OHVs globally : Complex, critical, and low volume high SKUs products.



Preferred component supplier for manufacturer of **<70 HP Tractors**.

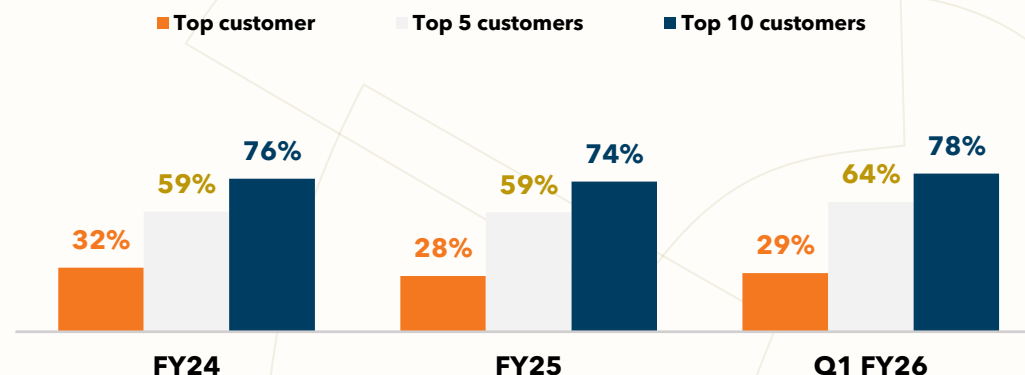


Involved from the design stage for new products and launches providing **end-to-end solutions**.

**CFM global players outside China*

Four of the Top Five Customers have been Associated with Uniparts for over 10 years

Trend of Customers Contribution to Sales



Superior Customer Service

Warehousing Sales : Pre-sales services and customized delivery.

Multiple Delivery Options

- Global delivery model encompassing local deliveries, Direct exports and warehouse sales.
- Delivery facilitated as per customer requirements.

Dual Shore Manufacturing

- Fully integrated engineering solutions provider
- Manufacturing facilities in India and US
- Efficiently utilised capacities and modular additions

Future Growth Drivers



New Product Platform
in Large Tractors
(High HP)



Expand into Large
Construction Equipment



Grow inorganically through
strategic acquisitions and
alliances.

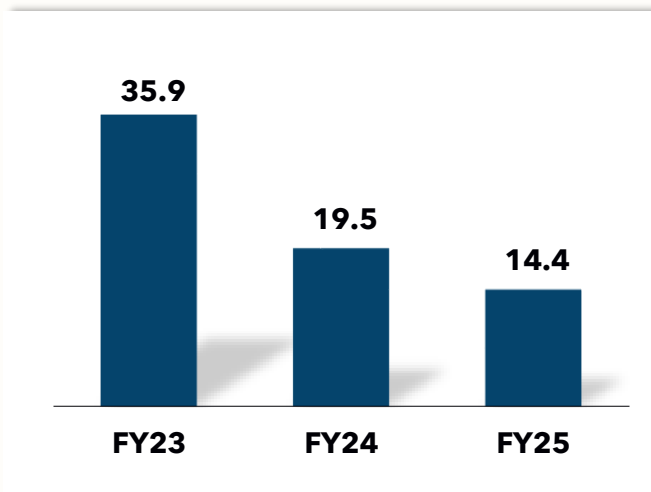


Expand into Geography
like Japan, Korea and
other Asia Pacific
nations

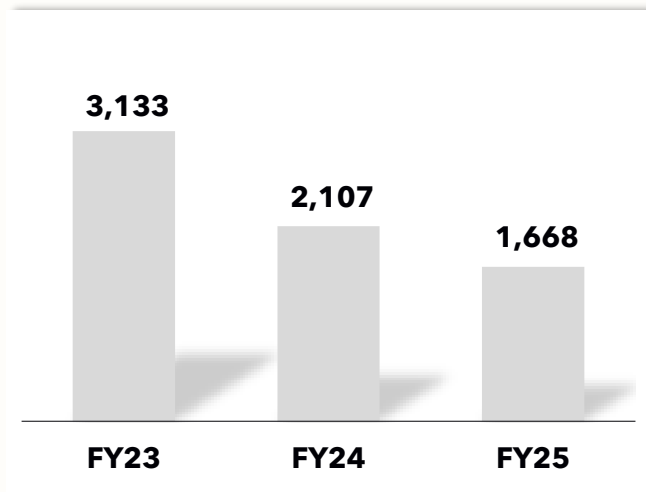


Key Financial Metrics - Historical

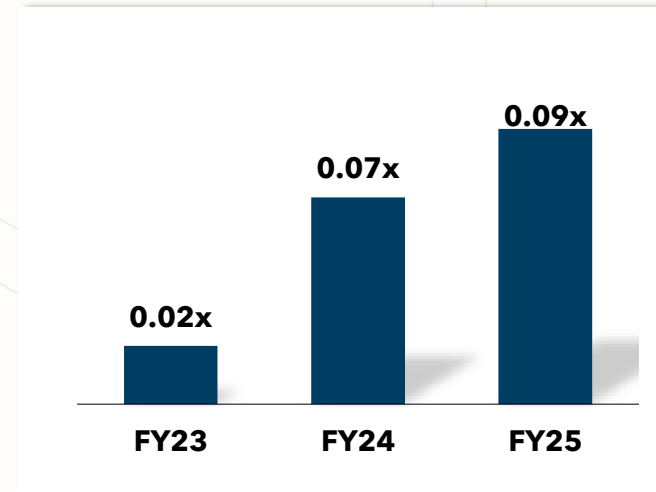
RoCE (%)



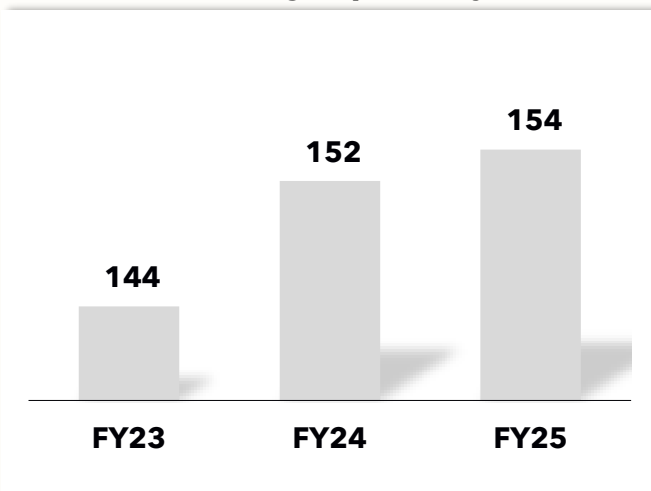
Reported EBITDA (Rs Mn)



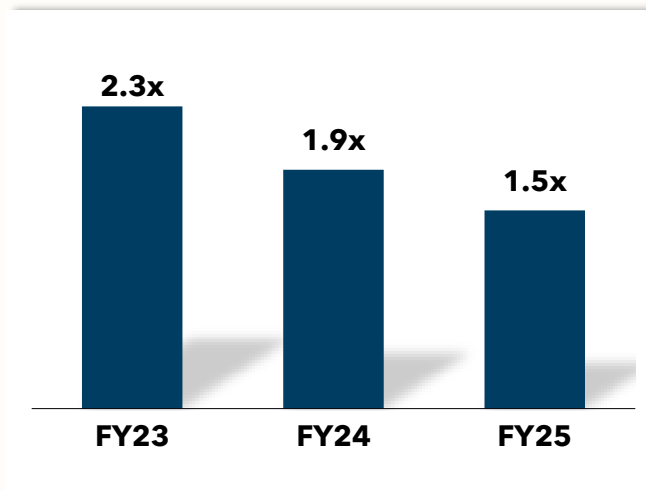
Debt / Equity



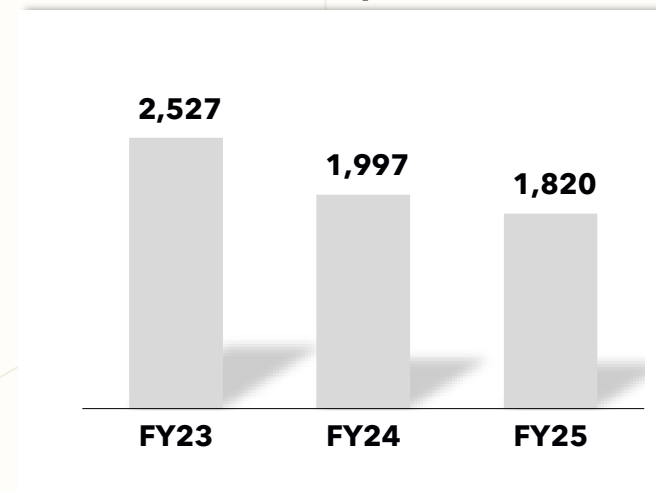
***Working Capital Days**



****Fixed Assets Turnover**



Cash Flow from Operations (Rs Mn)



*Working Capital Days = (Inventory + Receivables – Payables) / Revenue from Ops *365. ; **Fixed Assets Turnover = Revenue from operation/Gross block (Including right to use assets)



Organisational Strengths



Senior Leadership Team with vast experience and expertise in OHV Industry.



Senior Leadership Team located across key geographies and time zones (US, Europe, India).



250+ Engineers / Technical Diploma holders.



50+ strong Business Development and Sales / Customer Service organization.



~45% staff members working with Uniparts Group for 10+ years.



Historical Profit and Loss

Figures in INR Mn	FY23	FY24	FY25
Revenue from operations	13,660	11,395	9,637
Other income	162	93	212
Total income	13,822	11,489	9,849
Cost of materials consumed	4,966	3,966	3,118
Changes in inventories of finished goods, work-in-progress, stock-in-trade and scrap	(91)	264	431
Gross Profit	8,947	7,260	6,300
Gross Profit Margin (%)	65%	63%	64%
Employee benefits expense	2,396	2,457	2,296
Other expenses	3,418	2,694	2,336
Total expenses	5,814	5,151	4,632
EBITDA	3133	2,107	1,668
EBITDA Margin (%)	23%	18%	17%
Depreciation and amortization expenses	390	417	442
EBIT	2,743	1,690	1,226
EBIT Margin (%)	20%	15%	12%
Finance costs	60	57	83
PBT	2,683	1,633	1,143
PBT Margin (%)	19%	14%	12%
Total tax expenses	633	387	263
PAT	2049	1,247	880
PAT Margin (%)	15%	11%	9%
Other comprehensive income / (loss) for the period / year, net of tax	(111)	(5)	(52)
Total Comprehensive Income	1,938	1,241	828
EPS attributable to owners of parent			
Basic EPS (in Rs.)	46.3	28.1	19.5
Diluted EPS (in Rs.)	45.4	27.6	19.5



Historical Balance Sheet

Figures in INR Mn	FY23	FY24	FY25
Assets			
Non - Current Assets			
Property, plant and equipment	2,037	2,001	2,010
Right of use assets	656	616	561
Capital work-in-progress	71	128	96
Goodwill	660	664	669
Other intangible assets	16	18	11
Intangible assets under development	1	-	24
Other financial assets	62	64	89
Current tax assets (Net)	59	75	92
Other non-current assets	33	21	4
Total non - current assets	3,595	3,587	3556
Current Assets			
Inventories	4,530	4,244	3,858
Investments	250	1,563	2,431
Trade receivables	1,553	1,335	1,126
Cash and cash equivalents	387	189	329
Other balances with banks	0	2	2
Other financial assets	33	48	6
Other current assets	221	320	388
Total current assets	6,978	7,700	8,140
Total Assets	10,573	11,287	11,696

Figures in INR Mn	FY23	FY24	FY25
Equity and Liabilities			
Equity			
Equity share capital	446	451	451
Other equity	7,860	8,227	8,421
Total equity	8,306	8,678	8,872
Liabilities			
Non - Current Liabilities			
Borrowings	94	22	12
Lease liabilities	360	318	252
Provisions	164	159	162
Deferred tax liabilities (Net)	229	226	225
Other non-current liabilities	11	10	10
Total non - current liabilities	858	735	661
Current Liabilities			
Borrowings	81	597	826
Lease liabilities	76	89	109
Trade payables due to:			
Micro and small enterprises	290	134	169
Other than micro and small enterprises	415	708	742
Other liabilities	392	268	267
Provisions	63	67	50
Current tax payable	93	10	0
Total current liabilities	1,411	1,873	2,163
Total liabilities	2,267	2,609	2,824
Total Equity and Liabilities	10,573	11,287	11,696



Content



Q1FY26 Performance



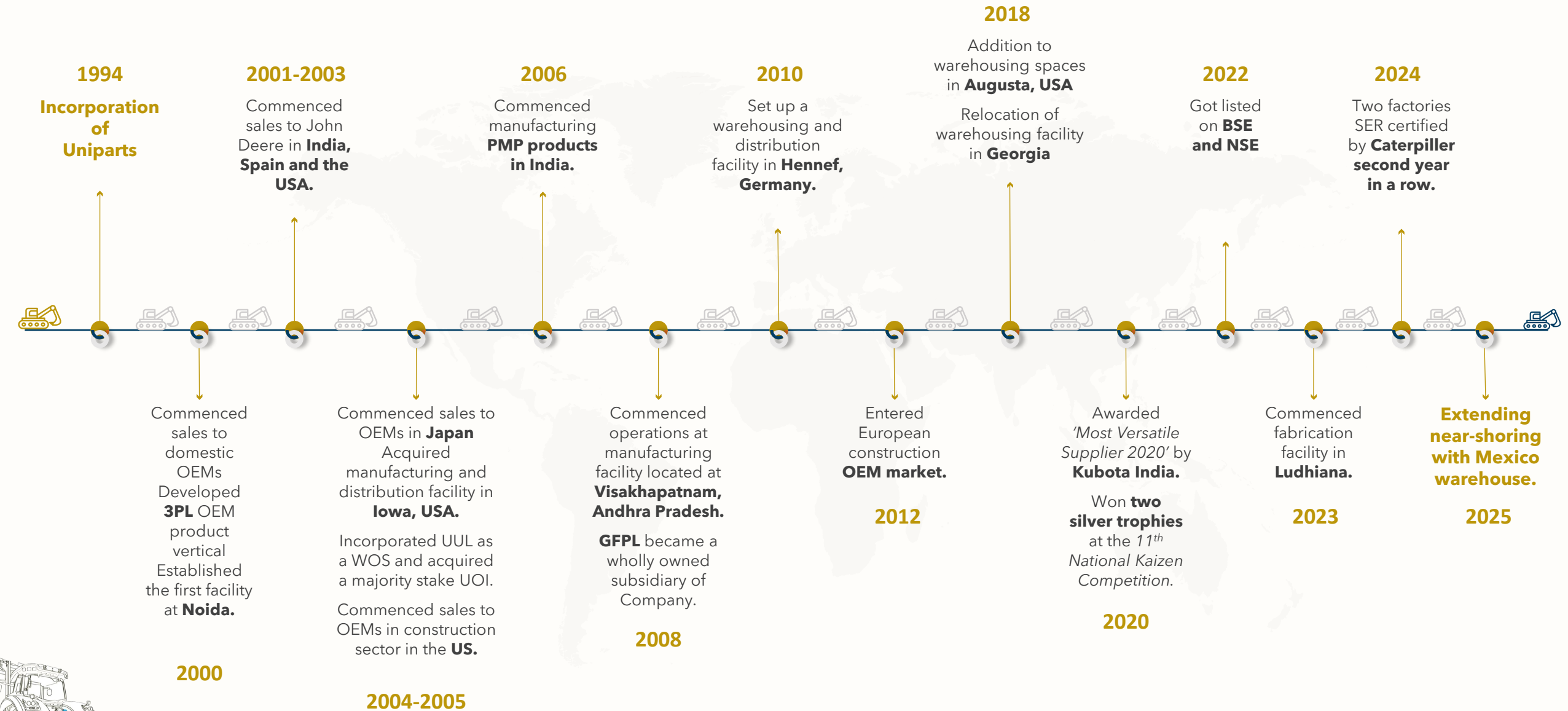
Business Overview



Annexures



Key Milestones





Uniparts India Ltd. (UIL)

100%



**Gripwel Fasteners Pvt. Ltd.
(GFPL)**



**Gripwel Conag Pvt. Ltd.
(GCPL)**



**Uniparts India GmbH
(UIG)**



**Uniparts USA Ltd.
(UUL)**

100%

**Uniparts Olsen Inc
(UOI)**



Leadership Team and Board



Mr. Gurdeep Soni

Promoter, Chairman & Managing Director

Location: India

Masters' degree in Management Studies from BITS Pilani.

4 decades of experience in the Industry. In charge of the aftermarket business.



Mr. Paramjit Singh Soni

Promoter, Executive Director and Vice Chairman

Location: USA

Bachelor's degree in Commerce from University of Delhi.

Over 4 decades of experience in the industry. In charge of OEM business, business growth and diversification plans of the Company.



Mr. Herbert Coenen

Non-Executive Director

Location: Germany

Diploma in Mechanical Engineering from the University of Applied Science, Cologne. Over 3 decades

experience in global OHV market. In charge of business development, expansion and technology.

Independent Director



Ms. Tanushree Bagrodia

Wholtime Director & Group COO

Location: India

Bachelors' degree in Computer Engg and MBA from INSEAD.

Over 2 decades of extensive experience across diverse geographies and sectors, spanning financial services, automotive, and start-ups. In charge of Company's group wide operations and customer service.



Mr. Rohit Maheshwari

Group Chief Financial Officer

Location: India

A qualified Chartered Accountant. Over 27 years

of experience in managing Finance, Accounts, Fund Raising, Taxation and M&A. In charge of Financial Planning, Accounting, Fund raising and Strategic projects.

Mr. Ajaya Chand

Ms. Celine George

Mr. Parmeet Singh Kalra

Mr. Sanjeev Kumar Chanana



Thank You

**For further information,
please get in touch with:**

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