

July 31, 2025

**Listing Department,  
BSE Ltd.,**  
Phiroze Jeejeebhoy Towers,  
Dalal Street,  
Mumbai-400 001  
Scrip Code: **532633**

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

Dear Sir/Madam,

**Sub: Submission of Investors' Presentation**

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

Kindly take the same on record.

Yours Faithfully  
**For Alldigi Tech Limited**  
(Formerly known as Allsec Technologies Limited)

**Shivani Sharma**  
**Company Secretary & Compliance Officer**  
Encl: - A/a

# alldigi tech

A digitide company

**Earnings Update**  
**Q1 FY26**



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# Q1 FY26 Key Highlights

## Revenue

₹ 143.9 Cr

↑ 11.3% YoY ↓ 1.5% QoQ

## Reported EBITDA

₹ 36.6 Cr

↑ 17.3% YoY ↑ 4.0% QoQ

## PAT\*

₹ 14.9 Cr

↓ 22.8% YoY ↓ 53.4% QoQ

**Financial performance:** Q1 FY26 revenue from operations up by 11%, driven by growth in both segments - BPM by 9% & Tech & Digital by 19%. EBITDA for the company up by 17% YoY primarily driven by higher international revenue mix at 66.2% in Q1'26 as against 62.0% in Q1'25 (YoY up 4.2%) & 63.6% (QoQ up 2.5%).

### Platforms :

- SP4 migration – SP4 migrations – 218 India customers (92% of Revenues) completed, balance by end July; Manila customers would be migrated across Q3.
- HRMS V2 upgrade completed; first few new clients onboarded on new platform

**Employee records** at 45.4 lacs (15.3 lacs as at 30th June) for Q1'26 higher by YoY 12% & QoQ 3%

### Segment Renamed:

The company has renamed the Customer Experience Management (CXM) business as Business Process Management (BPM) and the Employee Experience Management (EXM) business as Technology & Digital (T&D) respectively, which better reflects the nature of the Company's offerings under these segments as also brings in alignment with the industry practice & that of the holding company, Digitide Solutions Limited.

The nature of services and delivery model of 'EXM Statutory Compliance' services closely aligns with the BPM operations and accordingly has been classified under the BPM segment.

\*Q4'25 includes an income tax refund along with Interest and Q1'25 includes gain from the sale of the LLC business.

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Company Overview



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Financial Performance



Business segments update



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# Company Overview

# Global Leader in Outsourcing Solutions

## Corporate



Subsidiary of Digitide Solutions, backed by Fairfax Holdings (Canada)



**25 years** of Global BPO service Excellence



**600 Client** engagements globally including Fortune 100 companies

## Tech & Digital



**~18 M** employee records processed per annum- clear market leadership



**4,71,000+** monthly employee self service portal log-ins



Continued investments in Tech/AI & Product upgrades

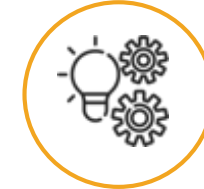
## BPM



Continued strong service delivery with topping of partner league tables for many customers



Journey from Operations to business value adds including Digital/ RPA tools



**2 decades** of delivering Global Business Solutions

# Global Delivery Capabilities

- ❖ Servicing **69 Countries**
- ❖ Holding company India, Subsidiaries - US & Manila.
- ❖ FTEs – Allsec ~ 6,300 - India (~4,500) Manila (~1,800)
- ❖ Manila - Multi-lingual hub offering **12+ International languages** using native speakers



**Chennai (HQ), Bangalore, Noida,  
India – ~4,500 Seats**

- Hindi
- English
- Tamil
- Telugu
- Kannada
- Malayalam
- Marathi
- Punjabi
- Gujarati
- Bengali
- Odia



**Manila, Philippines – ~1800 Seats**

- Mandarin
- Spanish
- Japanese
- German
- Turkish
- French
- English
- Arabic
- Portuguese
- Malay
- Bahasa-Indonesia
- Italian
- Polish



**New Jersey, USA**

# Leading and growing provider of E2E T&D services



## HR Services

- On-boarding
- Employee Info Store
- Postings
- Exits



## Reimbursement System

- Travel Requisition with workflow
- Alerts to Travel Desk, Admin
- Travel Claims & Vouching
- Settlements



## Leave & Attendance

- Leave Mgt. with ESS & Workflow
- Time Management, Shifts, OT
- Attendance Processing



## HRMS & Eco-system

- Hire-to-Retire HRMS integrated with a product eco-system supported by best-in-class partners



## Payroll

- Global & Configurable Payroll
- Tax Engines
- Payroll Statutory & Control Reports



## Retirals

- PF Trust Accounting
- Loans
- Investments

### Smart HR

Better workplace with an end-to-end solutions for Enterprise Customers



SmartHR for SME/ SaaS

### Smart Pay

Manage & deliver powerful & accurate payroll every time

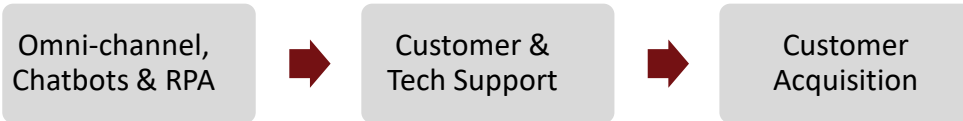
### Smart Stat

Tackle complex payroll compliances backed by technology

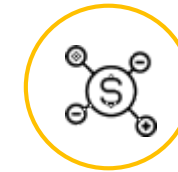
# BPM: Cutting edge Digital Business Services offerings



## Customer Experience Management



## Insurance



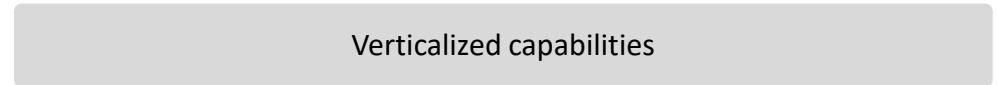
## Transaction Processing



## Collections – Verticalized Capabilities



## Healthcare



## Compliance





## Key Business Highlights

# Financial Highlights – Q1FY26

## Financial

### Q1 FY26 P&L highlights:

(in ₹ Crs.)

		YOY%	QoQ%
Revenue	143.9	▲ 11.3%	▲ 1.3%*
EBITDA	36.6	▲ 17.3%	▲ 4.0%

### Balance Sheet:

Cash & Liquid Funds	158.4	▼ 9.3 Cr	▼ 6.7 Cr
OCF	20.1	▼ 20.9%	▼ 58.3%

- \*Revenue normalized for seasonality in Q4'25
- OCF is lower QoQ due to receipt of Income tax refunds in Q4'25 and lower YoY as Q1'25 included proceeds from the LLC divestment

		YOY%	QoQ%
EBITDA Margin	25.4%	▲ 130bps	▲ 130bps
PAT (Crs)	14.9	▼ 22.8%	▼ 53.4%

Collection (Crs)	129.6	▼ 3.0%	▼ 15.5%
DSO (Billed & Unbilled)	87days	▼ 6 days	▼ 6 day

- Q4'25 includes an income tax refund along with Interest and Q1'25 includes gain from the sale of the LLC business.
- DSO higher on account of marginal delay in collections from couple of customers in BPM business, funds since received.

# Q1 FY'26 Business Highlights

## Tech & Digital



- Tech & Digital revenue up by YoY 18.6% from both existing & new clients
- Net employee records added : ~ 4.76 lacs, up by 11.7% YoY
- 11 New logos added in Q1'26, ACV ~ 9.5 Cr

## BPM



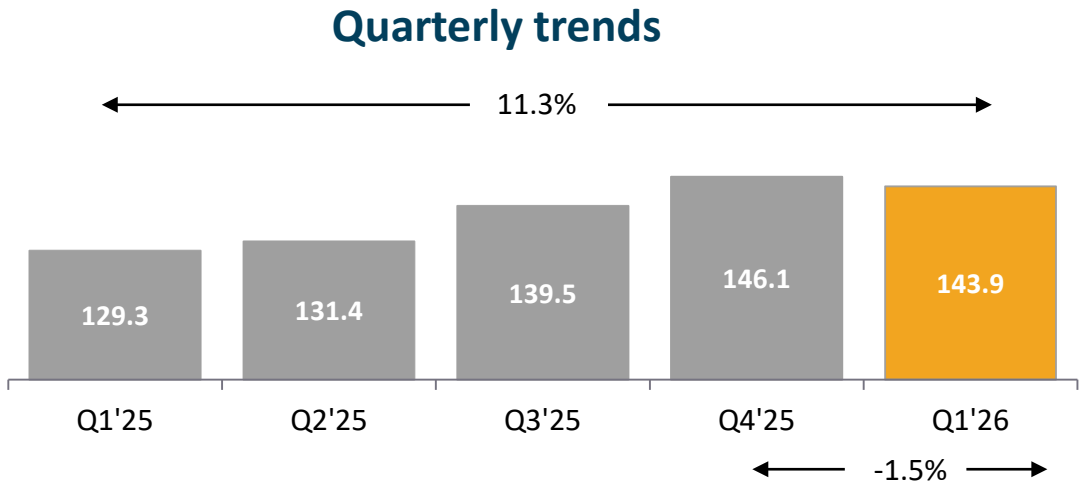
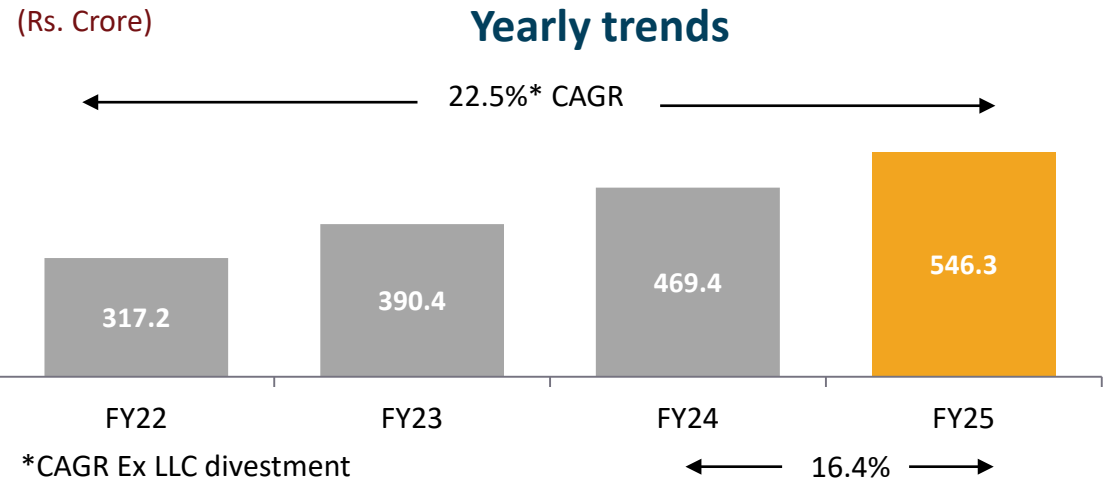
- BPM Revenue growth up by 12.4% YoY
- Healthcare continues to contribute significantly to this growth
- BPM International business up by 17.8% YoY
- ACV ~ ₹ 10.8 Cr added from account mining & hunting.



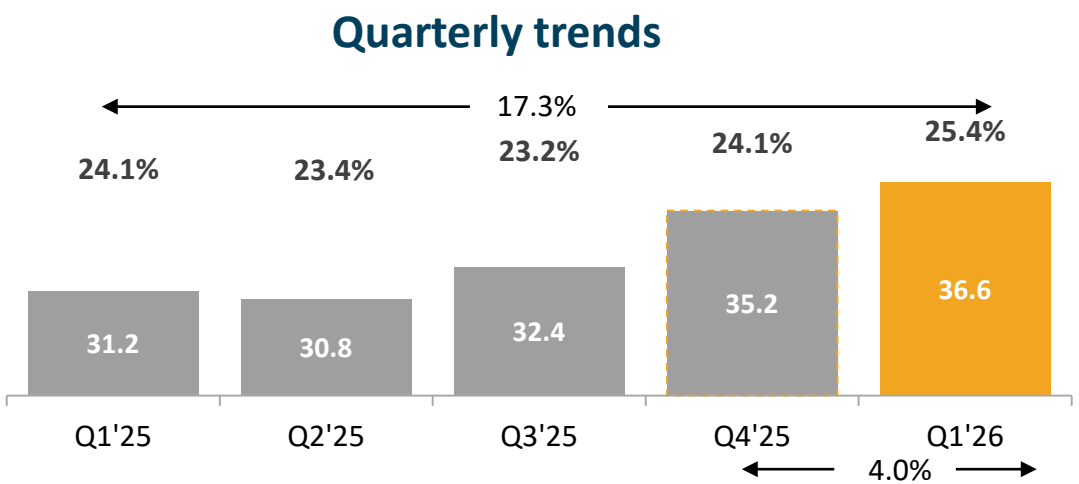
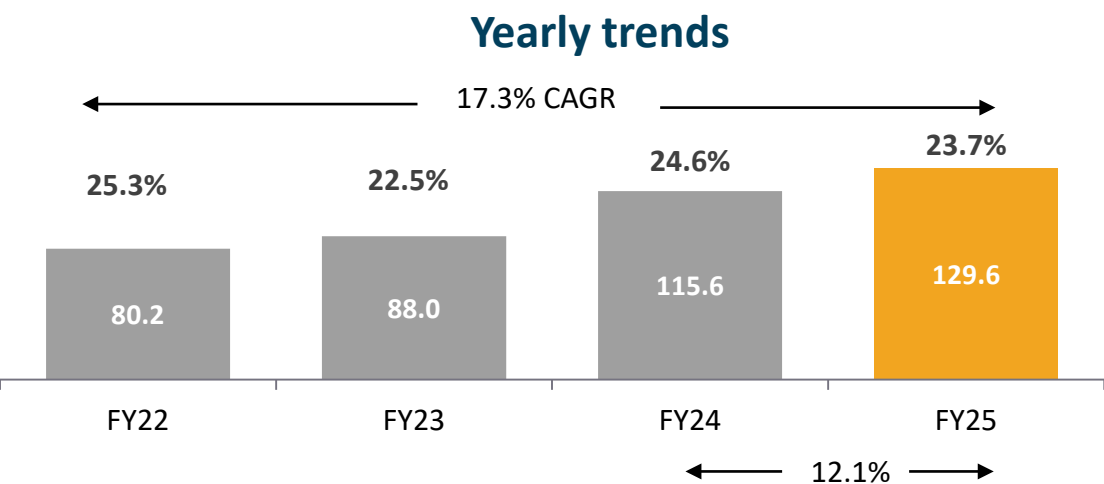
# Financial Performance

# Q1 FY26 Financial Highlights (1/2)

## Revenue

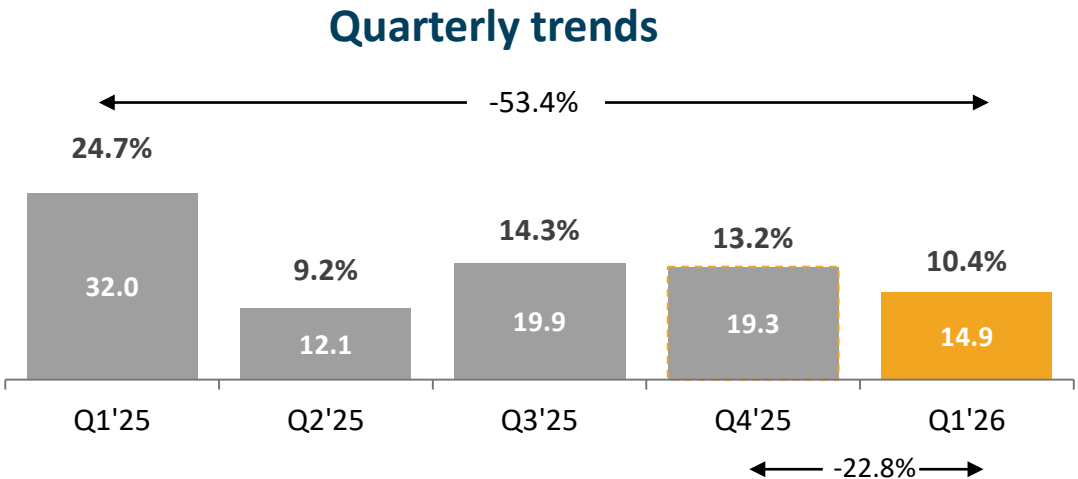
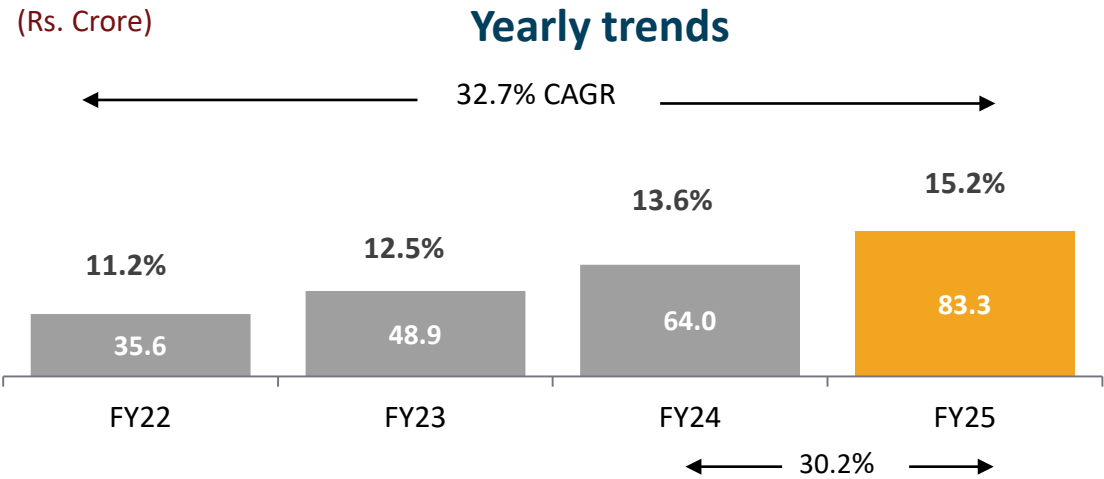


## EBITDA and EBITDA%

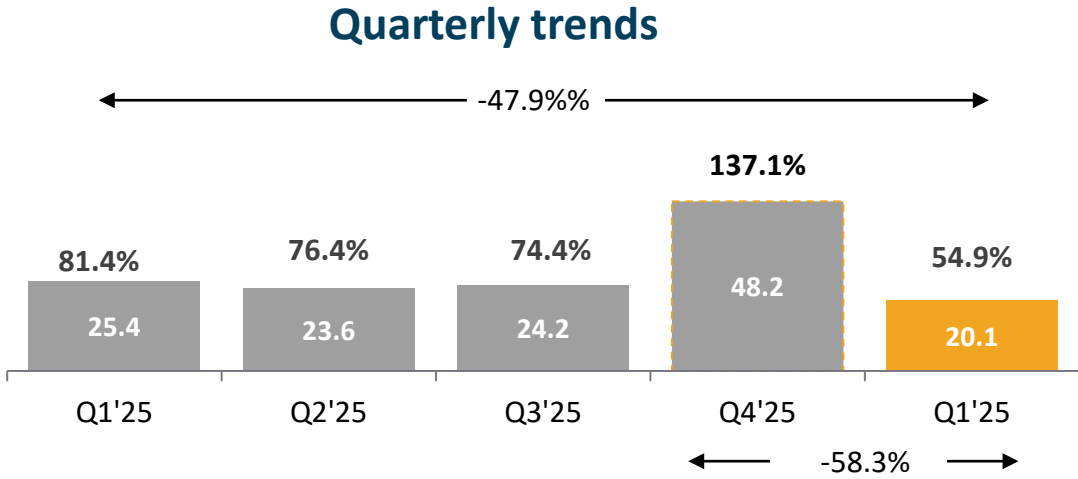
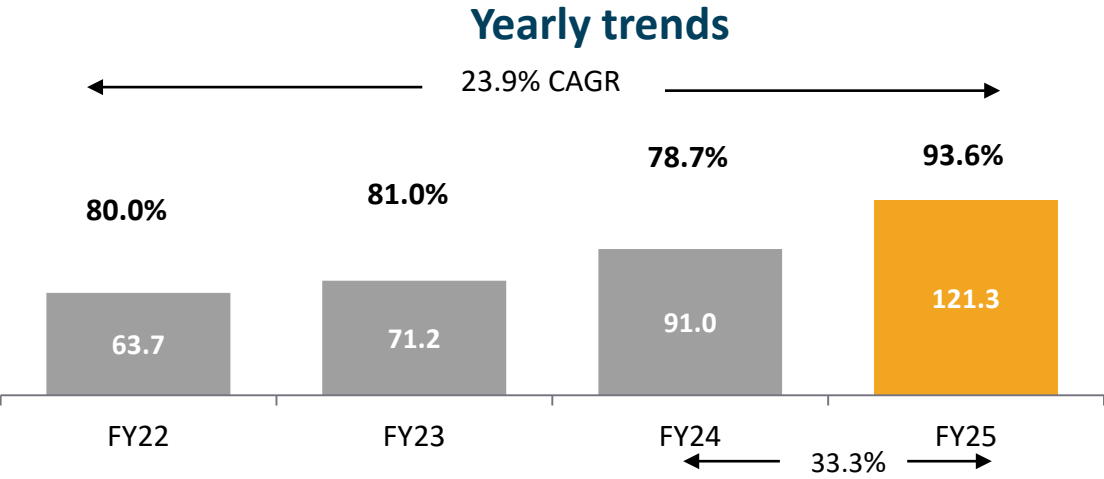


# Q1 FY26 Financial Highlights (2/2)

## PAT and PAT%



## OCF and OCF Conversion%

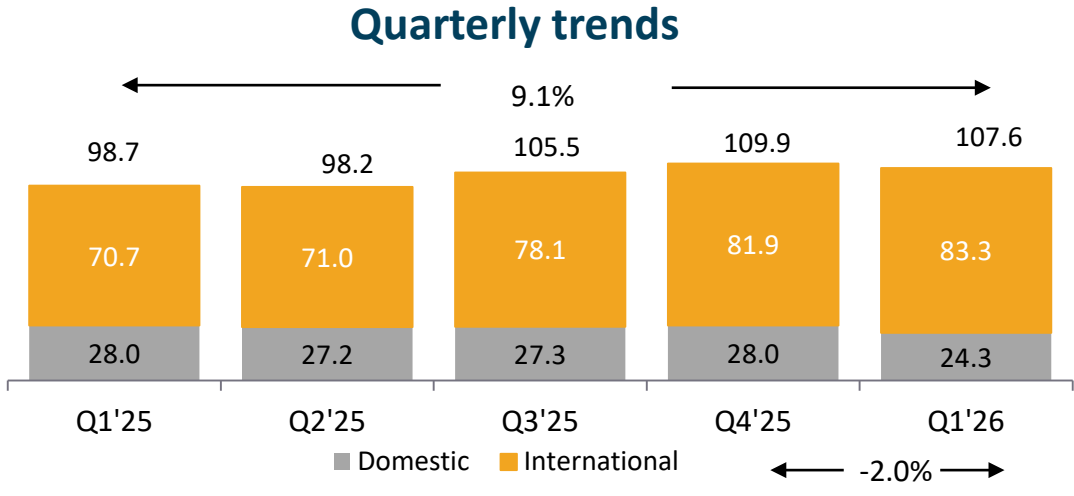
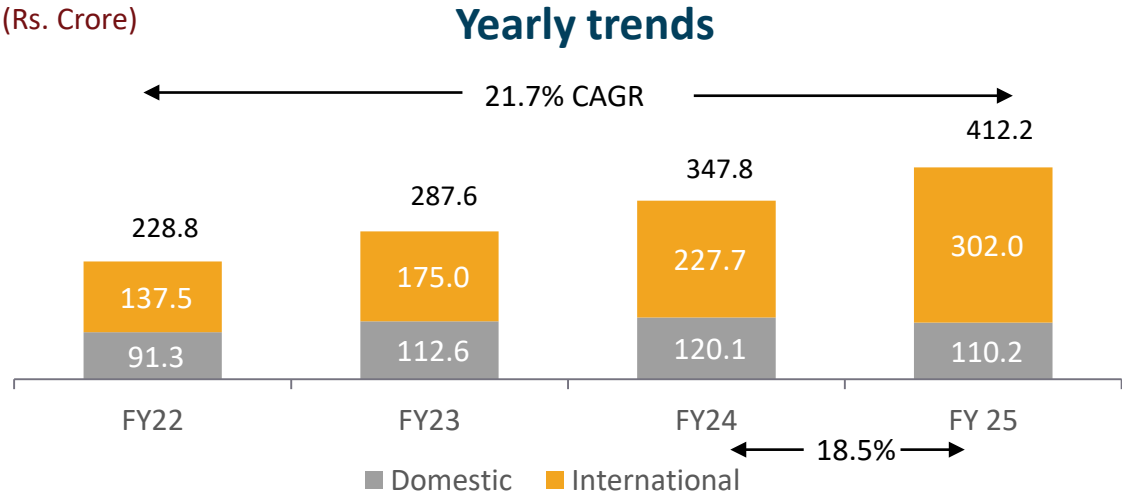




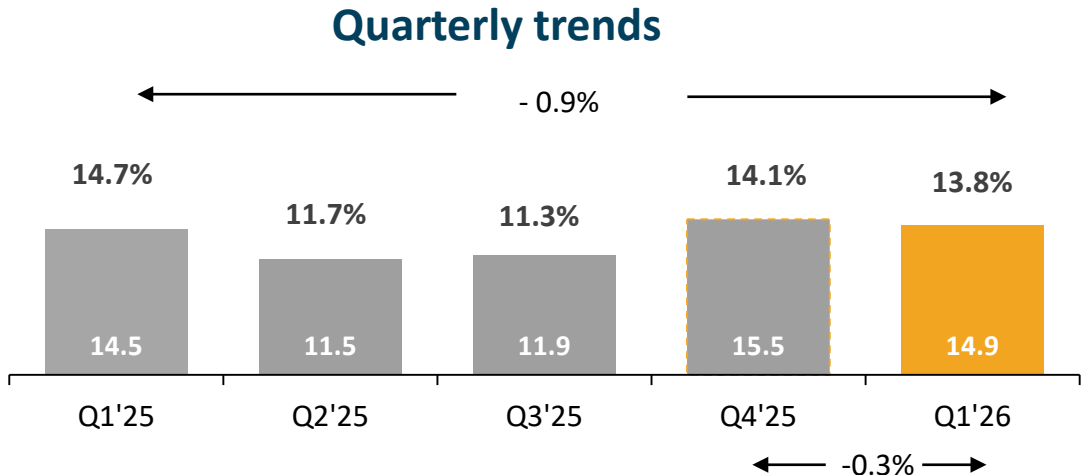
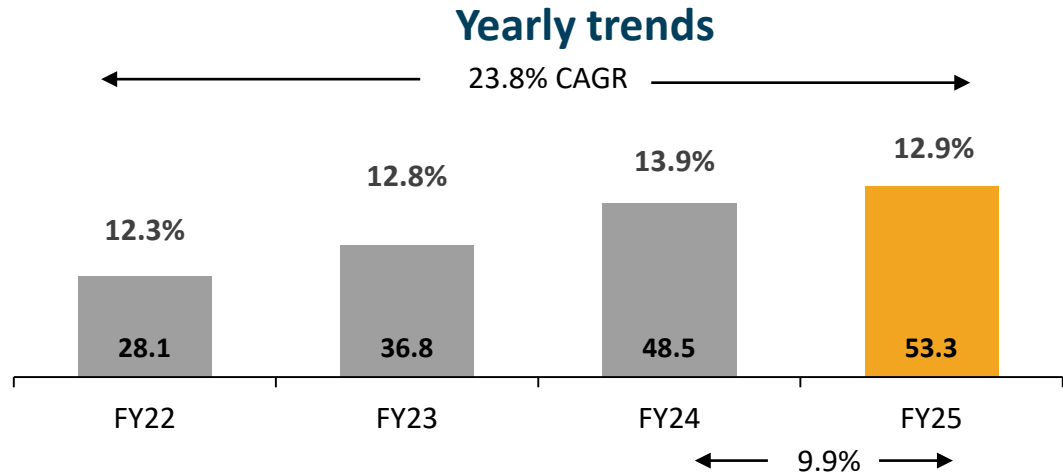
# Business Segment Updates

# BPM – Q1 FY 26 Performance

## Segment Revenue

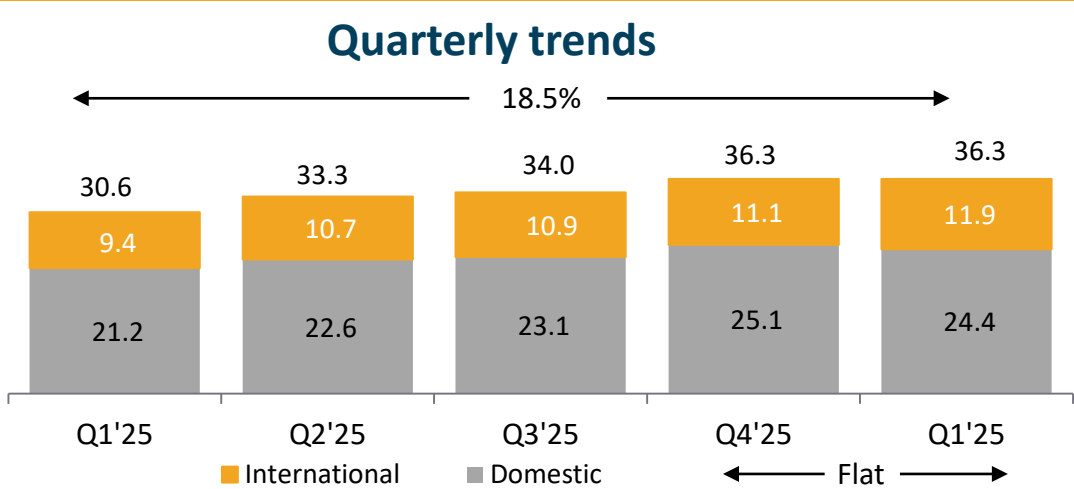
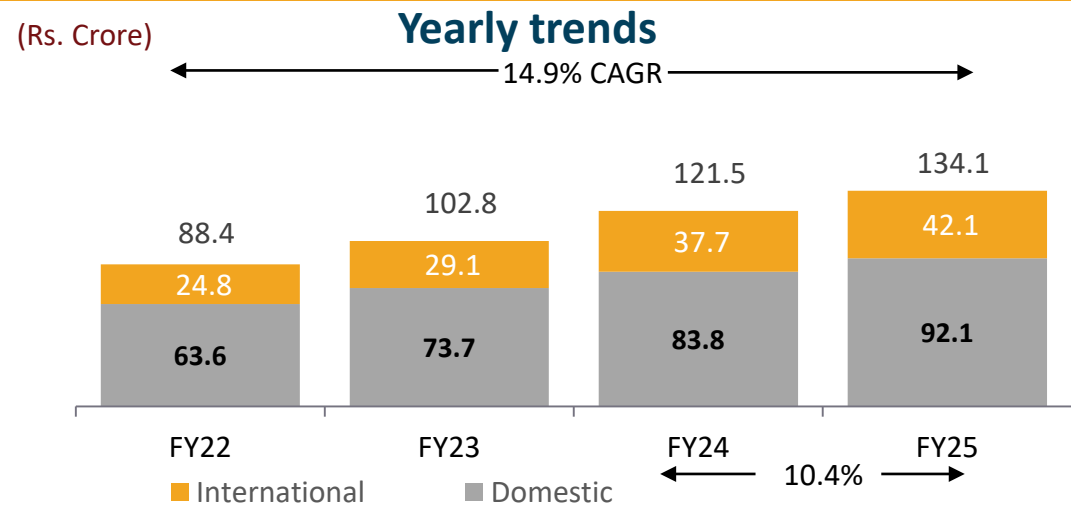


## Segment Margin and %

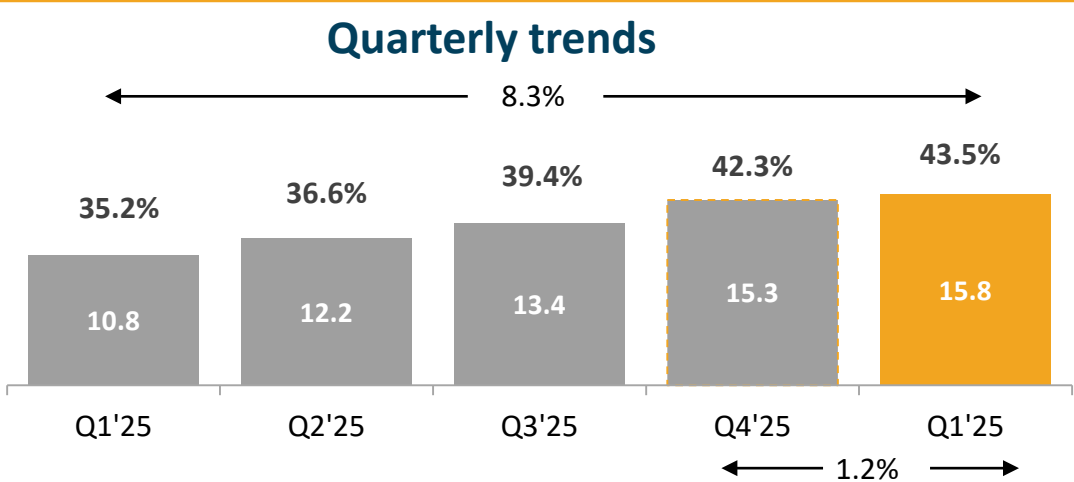
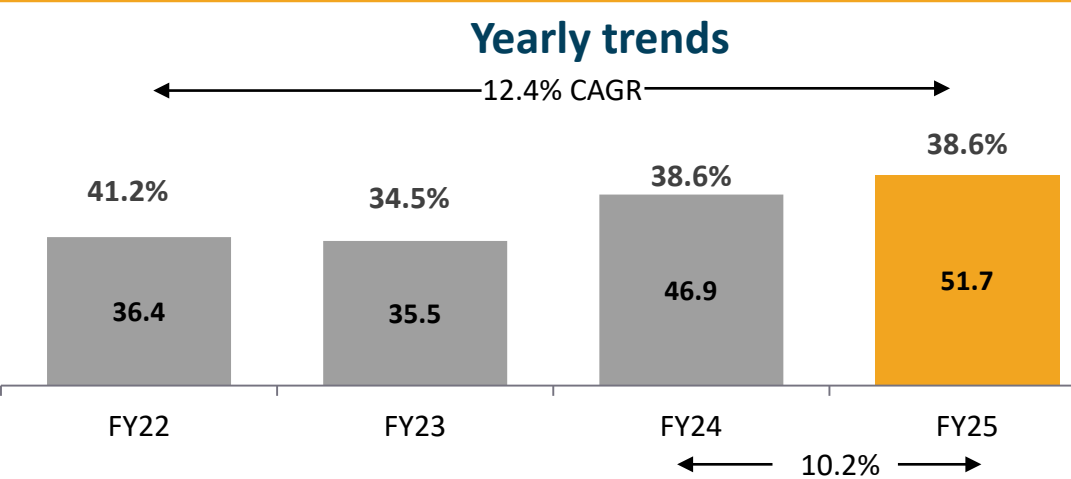


# Tech & Digital – Q1 FY 26 Performance

## Segment Revenue

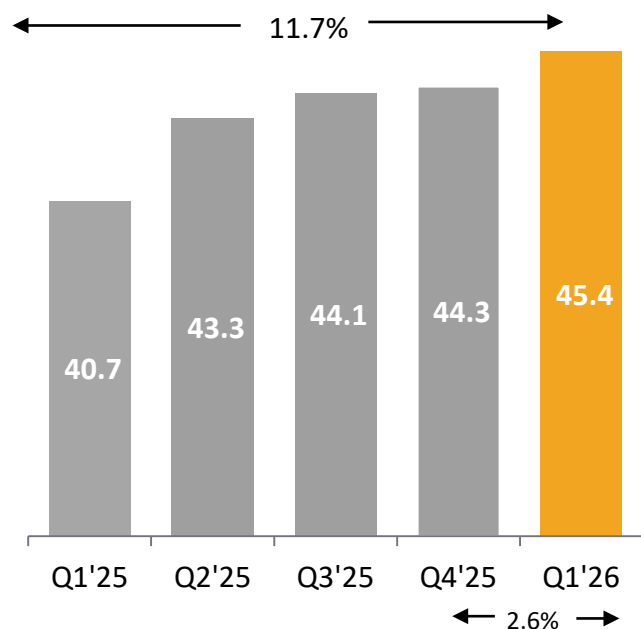


## Segment Margin and Margin%

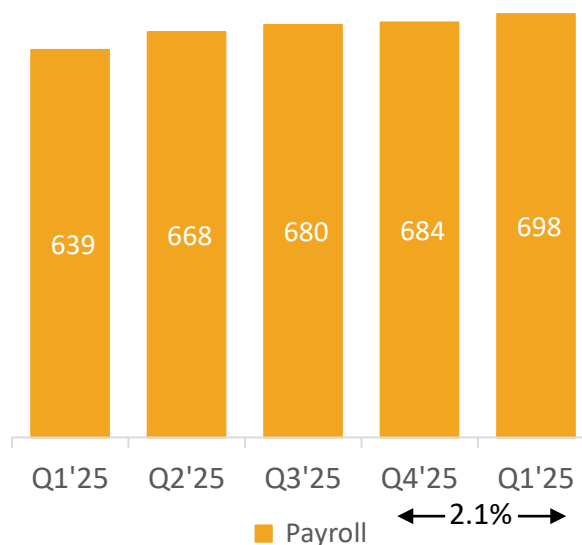


# FTEs & Employee Records Processed

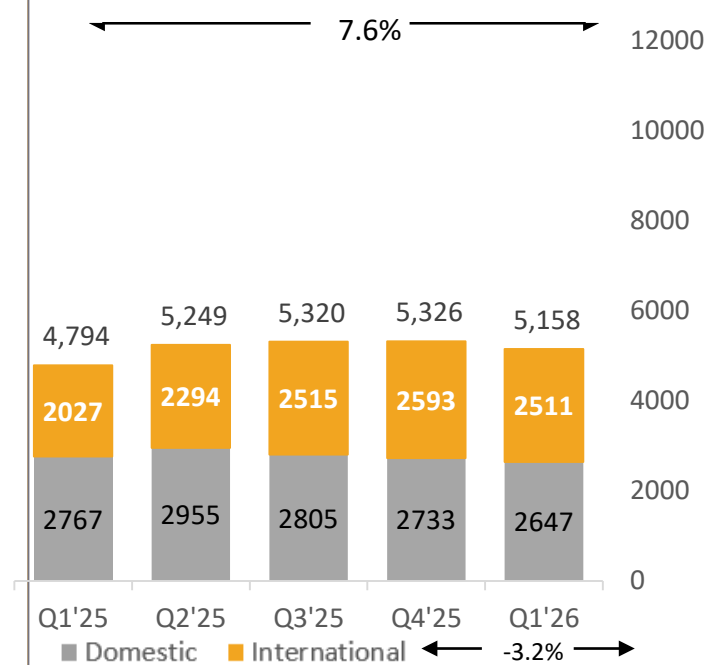
## Employee records (Lacs)



## Tech & Digital FTE (Avg)



## BPM FTE (Avg)



- T&D employee records processed up by 11.7% YoY & 2.6% QoQ
- T&D FTE Payroll up by 9.3% YoY
- International FTE up by 23.9% YoY



# Annexures

# Income Statement

Particulars ( in Rs. Cr)	Q1 FY26	Q4 FY25	QoQ	Q1 FY25	YoY
<b>Revenue from Operations</b>	<b>143.9</b>	<b>146.1</b>	<b>-1.5%</b>	<b>129.3</b>	<b>11.3%</b>
Employee Benefit Expenses	(84.2)	(82.5)	2.0%	(75.2)	12.0%
Other Expenses	(23.2)	(28.4)	-18.4%	(23.0)	0.9%
Total Expenses	(107.4)	(110.9)	-3.2%	(98.1)	9.4%
<b>EBITDA</b>	<b>36.6</b>	<b>35.2</b>	<b>3.8%</b>	<b>31.2</b>	<b>17.3%</b>
<b>EBITDA Margin</b>	<b>25.4%</b>	<b>24.1%</b>	<b>130bps</b>	<b>24.1%</b>	<b>130bps</b>
Other Income	2.9	4.6	-36.3%	2.8	3.2%
Finance Cost	(1.9)	(1.5)	27.3%	(1.1)	76.9%
Depreciation and Amortisation	(13.4)	(12.2)	10.0%	(9.8)	36.7%
<b>PBT &amp; Exceptional Item</b>	<b>24.2</b>	<b>26.1</b>	<b>-7.5%</b>	<b>23.1</b>	<b>4.4%</b>
Exceptional Item	0.0	(0.8)	-100.0%	17.1	-100.0%
<b>Profit Before Tax</b>	<b>24.2</b>	<b>25.3</b>	<b>-4.5%</b>	<b>40.2</b>	<b>-40.0%</b>
<b>PBT Margin</b>	<b>16.8%</b>	<b>17.3%</b>	<b>-50bps</b>	<b>31.1%</b>	<b>-1430bps</b>
Normal Tax	(9.3)	(6.0)	54.3%	(8.3)	12.0%
<b>Profit After Tax</b>	<b>14.9</b>	<b>19.3</b>	<b>-22.8%</b>	<b>32.0</b>	<b>-53.4%</b>
<b>PAT Margin</b>	<b>10.3%</b>	<b>13.2%</b>	<b>-290bps</b>	<b>24.7%</b>	<b>-1440bps</b>
Basic and Diluted EPS (in Rs.)	9.8	12.7	-23.1%	21.0	-53.4%

# Balance Sheet

Particulars ( in Rs. Cr)	As at 31-Mar-23	As at 31-Mar-24	As at 31-Mar-25	As at 30-Jun-26
<b>Assets</b>				
<b>Non-Current Assets</b>				
Property, Plant and Equipment ( inc CWIP)	12.2	21.7	27.6	29.3
Right of Use Assets	42.4	41.5	61.1	74.2
Other Intangible Assets ( inc IAUD)	17.2	15.1	17.2	15.4
Other Non-Current Assets	27.2	38.4	21.5	24.0
	<b>98.9</b>	<b>116.6</b>	<b>127.3</b>	<b>142.8</b>
<b>Current Assets</b>				
Current Investments	46.8	56.3	82.7	102.7
Cash and Cash Equivalents	90.4	82.0	82.4	55.6
Trade Receivables	59.2	65.7	71.9	90.6
Unbilled Revenues & Financial assets	28.9	29.7	47.6	48.1
Other Current Assets	9.4	17.3	7.3	9.5
	<b>234.7</b>	<b>251.0</b>	<b>291.9</b>	<b>306.6</b>
<b>Total Assets</b>	<b>333.6</b>	<b>367.6</b>	<b>419.3</b>	<b>449.4</b>
<b>Liabilities</b>				
<b>Equity and Reserves</b>	<b>229.7</b>	<b>245.5</b>	<b>259.5</b>	<b>274.3</b>
<b>Non-Current Liabilities</b>				
Lease Liability	25.1	26.4	43.3	57.4
Other Non-Current Liability	7.7	9.3	8.0	11.6
	<b>32.8</b>	<b>35.7</b>	<b>51.3</b>	<b>69.0</b>
<b>Current Liabilities</b>				
Lease Liabilities	18.9	18.2	19.9	19.9
Trade Payables and Other Current Liabilities	52.2	68.2	88.6	86.2
	<b>71</b>	<b>86.4</b>	<b>108.5</b>	<b>106.1</b>
<b>Total Equity and Liabilities</b>	<b>333.6</b>	<b>367.6</b>	<b>419.3</b>	<b>449.4</b>

# Cashflow Statement

Particulars ( in Rs. Cr)	31-Mar-23	31-Mar-24	31-Mar-25	30-Jun-26
<b>PBT</b>	<b>64.5</b>	<b>85.1</b>	<b>110.0</b>	<b>24.2</b>
Add: Non Cash Expenses / Income	24.5	34.7	21.6	11.6
<b>Operating Profit before Working Capital Changes</b>	<b>89.0</b>	<b>119.8</b>	<b>131.6</b>	<b>35.8</b>
Changes in Working Capital and Tax Paid	(17.7)	(29.0)	(13.1)	(15.7)
<b>Net Cash Generated from Operating Activities</b>	<b>71.2</b>	<b>90.8</b>	<b>118.5</b>	<b>20.1</b>
Capex	(15.4)	(17.5)	(17.4)	(17.2)
Sale /(Purchase) of current investments (net) & Other Investing activity	(2.0)	(12.0)	(5.0)	(21.2)
<b>Cash Flow from Investing Activities</b>	<b>(17.4)</b>	<b>(29.5)</b>	<b>(22.4)</b>	<b>(38.4)</b>
Interest Paid	(3.7)	(3.8)	(3.8)	(1.6)
Payment of Lease Liabilities	(17.4)	(21.4)	(24.2)	(6.6)
Dividend Pay-out	(30.5)	(45.7)	(68.5)	0.0
<b>Cash Flow from Financing Activities</b>	<b>(51.6)</b>	<b>(70.9)</b>	<b>(96.5)</b>	<b>(8.2)</b>
<b>Net Cash in Cash and Cash Equivalents</b>	<b>2.3</b>	<b>(9.6)</b>	<b>(0.4)</b>	<b>(26.6)</b>
Opening Cash and Cash Equivalents	81.4	90.1	81.7	81.7
Exchange Rate Fluctuations	6.4	1.2	0.1	(0.2)
<b>Closing Cash and Equivalents</b>	<b>90.1</b>	<b>81.7</b>	<b>81.4</b>	<b>55.0</b>



# alldigi tech

formerly allsec technologies

A digitide company

Thank You!