August 09, 2025

BSE Limited 1st Floor, New Trading Ring, Rotunda Bldg., P. J. Towers, Dalal Street, Fort, Mumbai 400 001 Scrip Code: **543965**	National Stock Exchange of India Limited Exchange Plaza, 5th Floor, Plot No. C/1, G Block, Bandra-Kurla Complex, Bandra (East),Mumbai 400 051 NSE Symbol: **TVSSCS**

Sub: Investor presentation of Earnings call with analysts/ investors

In compliance with Regulation 30 read with Para A of Part A of Schedule III and other applicable provisions of Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015 and further to our announcement dated August 04 ,2025 on earnings conference to be held on August 11, 2025, we enclose herewith a copy of the investor presentation.

The intimation is simultaneously uploaded in the Company's website at https://www.tvsscs.com/investor-relations/.

Kindly take the above information on record.

Thanking You,

Yours faithfully,

For TVS Supply Chain Solutions Limited

KRISHNA PRASAD P D

Digitally signed by KRISHNA PRASAD P D
Date: 2025.08.09 15:50:26 +05'30'

P D Krishna Prasad

Company Secretary

Encl: As above

TVS Supply Chain Solutions Limited

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CIN: L63011TN2004PLC054655

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TVS Supply Chain Solutions

Q1 FY26 Earnings Presentation

August 2025

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Forward-looking statements and financial projections are based on the opinions and estimates of management at the date the statements are made and are subject to a variety of risks and uncertainties and other factors that could cause actual events or results to differ materially from those anticipated in the forward-looking statements and financial projections. Representative examples of factors that could affect the accuracy of forward looking statements include (without limitation) the condition of and changes in India's political and economic status, government policies, applicable laws, international and domestic events having a bearing on Company's business, and such other factors beyond our control.

Forward-looking statements and financial projections include, among other things, statements about: our expectations regarding our transaction volumes, expenses, sales and operations; our future merchant and consumer concentration; our anticipated cash needs, our estimates regarding our capital requirements, our need for additional financing; our ability to anticipate the future needs of our merchants and consumers; our plans for future products and enhancements of existing products; our future growth strategy and growth rate; our future intellectual property; and our anticipated trends and challenges in the markets in which we operate. Forward-looking statements are not guarantees of future performance including those relating to general business plans and strategy, future outlook and growth prospects, and future developments in its businesses and its competitive and regulatory environment. These forward-looking statements represent only the Company's current intentions, beliefs or expectations, and no representation, warranty or undertaking, express or implied, is made or assurance given that such statements, views, projections or forecasts in the Presentation, if any, are correct or that any objectives specified herein will be achieved.

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From the desk of MD

Ravi Viswanathan
Managing Director

Transforming for the Future: Integrated structure, Realigned Segments, and Strong Value Outcomes

"We have entered FY26 with clear strategic priorities aimed at enhancing performance and driving long-term value creation. At the core of these priorities is our continued focus on customer-centricity, aligning how we operate with how our customers consume our solutions.

As a consequence, we have integrated our IFM and ISCS businesses in the UK & Europe under a single leadership structure, enabling tighter collaboration and a more unified approach to service delivery. This organizational shift also triggered a realignment in the way we operate and report our segments ensuring that our internal structure mirrors how customers experience our offerings. Towards this, we have launched Project One, a transformation journey designed to unlock long-term value by driving integration across all aspects of our business in the UK and Europe.

We continue to take decisive actions across other regions to improve operational agility consistent with our commitment to building a leaner, more focused organization.

As an asset-light enterprise, we made a strategic investment in TVS ILP to build a scalable platform focused on acquiring and developing logistics infrastructure at strategic locations. That vision is now delivering results with 11 million sq. ft. of platform transferred into an InvIT backed by marquee investors, unlocking substantial value in Q1 FY 26

Our ISCS business remain resilient with IFM on a strong performance path. We are continuing to see sustained momentum in our pipeline and key client additions.

While GFS business continues to face macroeconomic pressures with uncertainty in tariffs, we remain confident that our group-wide initiatives will keep us on track toward our long-term objectives."

From the desk of CFO

R Vaidhyanathan
Global CFO

Commenting on the financial performance of the company, R Vaidhyanathan, Global CFO said -

"We have commenced FY26 on a steady footing, with continued improvement in profit delivery and focused execution of our transformation agenda. Our margin improvement reflects operational discipline across key businesses.

Our strategic cost take-out initiatives are tracking well across regions.

Our Restructuring Program - Project One in the UK and Europe Region is set to improve the operating leverage and long-term margin trajectory by redefining our cost baseline.

In Q1 FY 26, we have made one-time cost provision, covering restructuring costs related to management restructuring, right sizing including warehouse consolidation and right shoring initiatives and costs relating to brand realignment as part of our structural transformation program as per applicable standards. These are exceptional and non-recurring in nature, aligned to our broader cost reset strategy. This will bring significant and sustainable savings.

We realized strong value from our early investment in TVSILP, with assets transferred through the InVIT platform backed by marquee investors, a strong validation of our strategic investment approach. Our share of profit from TVSILP is ₹ 177 Crs for Q1 FY 26 backed by the significant gain from InvIT

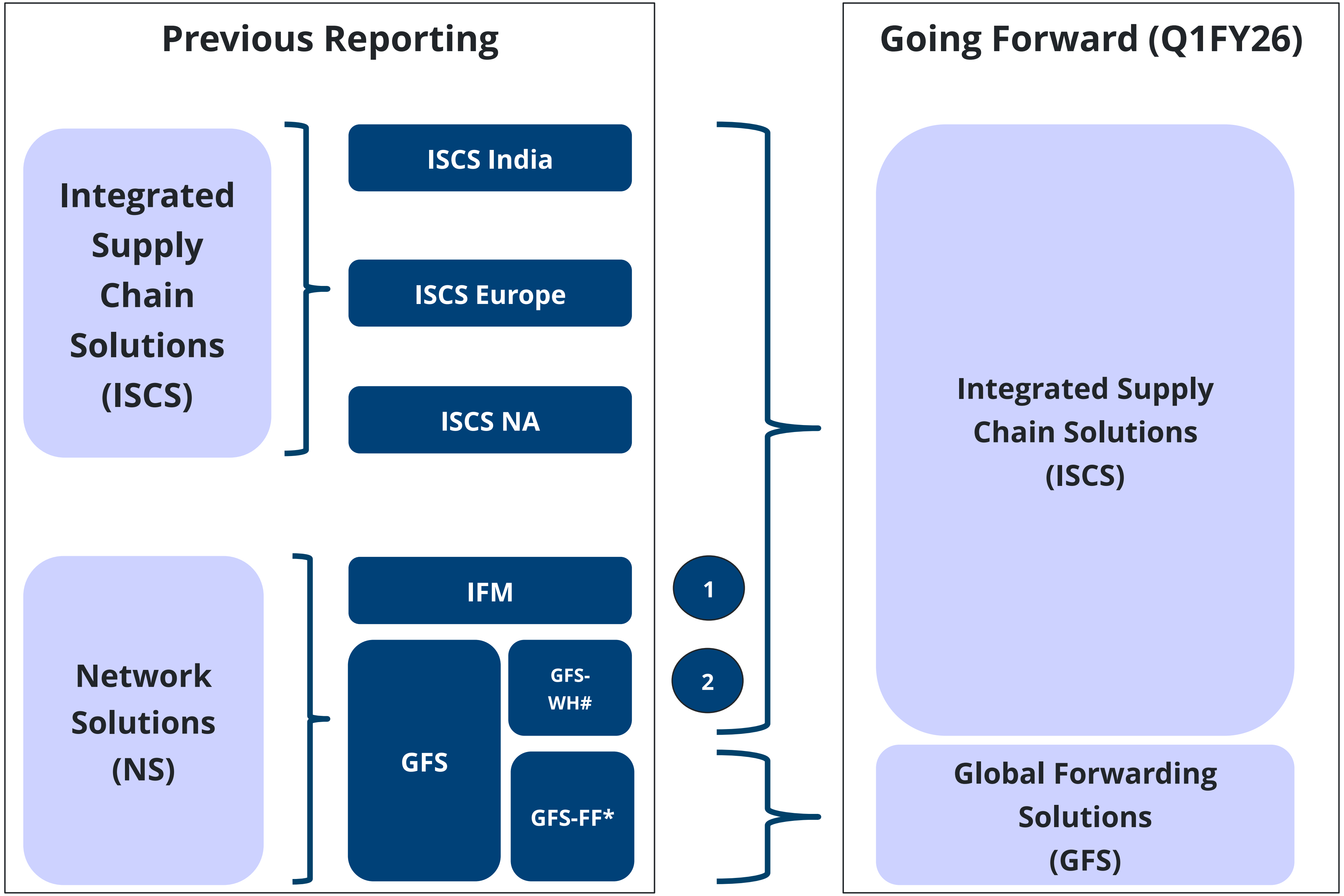
We remain committed to disciplined execution, in delivering progressive improvements in margin profile and bottom-line performance through the course of FY26 & beyond."

Transformation initiatives

Q1 FY26

TVS Supply Chain Solutions

Unified organizational model driving customer-centric outcomes…



The strategic drivers

- ✓ **Reflects how customers consume our solutions:** The new organizational structure brings together ISCS and IFM under one unified model, enabling bundled, end-to-end services tailored to client needs.
- ✓ **Enables scale benefits and strategic focus:** The integrated structure supports margin expansion, reduces duplication, and sharpens execution across our integrated supply chain solutions.
- ✓ **GFS reflects our freight forwarding business.**

WH - Few warehousing contracts in Singapore & Thailand
* FF – Freight Forwarding

…resulting in change in segment reporting – Effective FY 26

Two changes

We are implementing two key changes in our segment structure to better reflect business realities and drive strategic clarity :

1. Integration of IFM into ISCS (UK & Europe) reflecting structural transformation
   - ✓ IFM business has been fully integrated into Integrated Supply Chain Solutions (ISCS) in the UK & Europe region
2. Reclassification of Warehousing contract services from GFS to ISCS
   - ✓ Few warehousing contracts in Singapore and Thailand, previously part of freight forwarding business, have been reclassified to ISCS
   - ✓ GFS will operate as a pure freight forwarding business, improving segment focus and clearer segment visibility for investors

Strategic realignment in UK & Europe – Project One Transformation effective Q1 FY 26

Project One (UK & Europe) : Single Leadership, Unified Structure, Unified Business model;
Leading to integration of ISCS and IFM in UK & Europe region

Strategic impact

- ✓ Unlocking long-term value through structural efficiency
- ✓ Faster decision-making and execution agility
- ✓ Margin expansion driven by efficiency gains and operating leverage
- ✓ Synergy in Business Development to drive cross-sell and deeper customer engagement

Financial Impact recognized in Q1 FY 26

- ✓ One-time restructuring cost of ₹ 53.3 Crs (including costs estimated to be incurred through FY 26)
    - ✓ Right sizing and right-shoring expenses
    - ✓ Closure/consolidation of select warehouses

- ✓ One time impairment (non-cash) relating to legacy brands associated with brand realignment - ₹ 38 Crs

- ✓ This is expected to bring in annualized savings of approx. ₹ 110 to ₹ 120 Crs and in-year FY 26 savings of approx. ₹ 50 to ₹ 60 Crs

TVS ILP InvIT listing

Strong Value Realization through InvIT

TVSILP InvIT Delivers Strong Value Realization

Strategic investment

- Our early-stage, strategic investment in TVS ILP was aimed at creating a scalable industrial and logistics platform focused on acquiring and developing infrastructures at key locations
- Our current shareholding is 25% in TVSILP
- TVSILP has built and transferred approximately 11 million sq. ft platform under various wholly owned SPVs into the InvIT backed by a group of marquee international and domestic investors

Significant value realisation for TVS SCS

- TVSILP has realized significant capital gains through transferring the assets to the InvIT
- As a JV partner, TVS SCS has recorded its share of the gain in its consolidated financials for Q1 FY26, aligned with applicable accounting standards; ₹ 177 Crs is the share of profit from TVS ILP for Q1 FY 26

Going forward

- TVS ILP continues to manage both the InvIT portfolio and the remaining assets;
- Future phases of asset development and transfer to InvIT will drive recurring value creation for TVS ILP and, in turn for TVS SCS and our shareholders

Restated segment numbers

FY 25

TVS Supply Chain Solutions

Restated FY25 numbers aligning with new segment structure

Revenue by segment

Revenue	As is Q1	As is Q2	As is Q3	As is Q4	As is FY25
ISCS	**1,425.9**	**1,348.5**	**1,301.2**	**1,421.0**	**5,496.5**
NS	**1,113.5**	**1,164.4**	**1,143.5**	**1,077.9**	**4,499.2**
Consol	**2,539.4**	**2,512.9**	**2,444.6**	**2,498.8**	**9,995.7**

Revenue	Restated Q1	Restated Q2	Restated Q3	Restated Q4	Restated FY25
ISCS	**1,905.6**	**1,838.5**	**1,827.4**	**1,943.4**	**7,514.9**
GFS	**633.8**	**674.4**	**617.2**	**555.4**	**2,480.8**
Consol	**2,539.4**	**2,512.9**	**2,444.6**	**2,498.8**	**9,995.7**

Adjusted EBITDA by segment

Adj. EBITDA*	As is Q1	As is Q2	As is Q3	As is Q4	As is FY25
ISCS	**138.3**	**149.1**	**114.1**	**122.0**	**523.5**
Adj EBITDA %	*9.7%*	*11.1%*	*8.8%*	*8.6%*	*9.5%*
NS	**50.6**	**27.4**	**44.0**	**54.5**	**176.5**
Adj EBITDA %	*4.5%*	*2.4%*	*3.8%*	*5.1%*	*3.9%*
Consol	**185.3**	**176.7**	**151.9**	**161.4**	**675.3**
Adj EBITDA %	*7.3%*	*7.0%*	*6.2%*	*6.5%*	*6.8%*

Adj. EBITDA*	Restated Q1	Restated Q2	Restated Q3	Restated Q4	Restated FY25
ISCS	**169.5**	**150.0**	**148.2**	**164.7**	**632.5**
Adj EBITDA %	*8.9%*	*8.2%*	*8.1%*	*8.5%*	*8.4%*
GFS	**21.0**	**28.2**	**11.5**	**8.7**	**69.4**
Adj EBITDA %	*3.3%*	*4.2%*	*1.9%*	*1.6%*	*2.8%*
Consol	**185.3**	**176.7**	**151.9**	**161.4**	**675.3**
Adj EBITDA %	*7.3%*	*7.0%*	*6.2%*	*6.5%*	*6.8%*

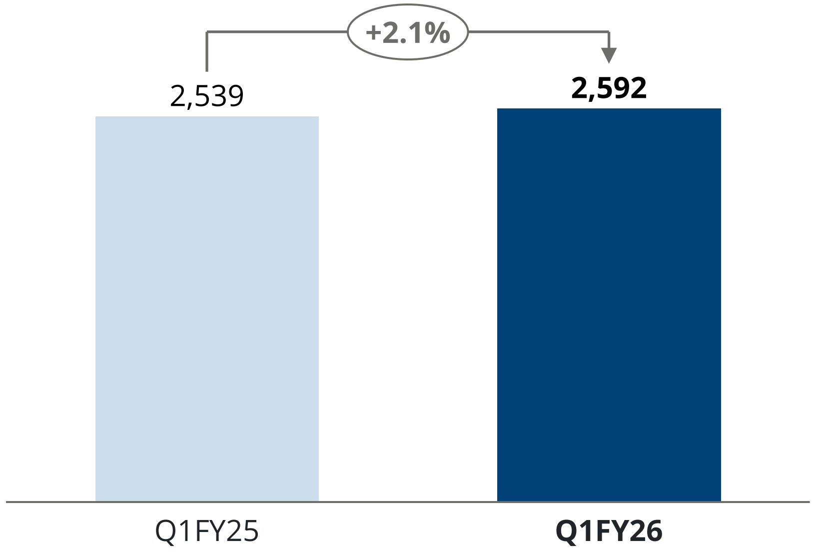
*Adjusted for ESOPS, Forex Gain/Loss and redundancy costs incurred in respective quarters

Q1 FY26

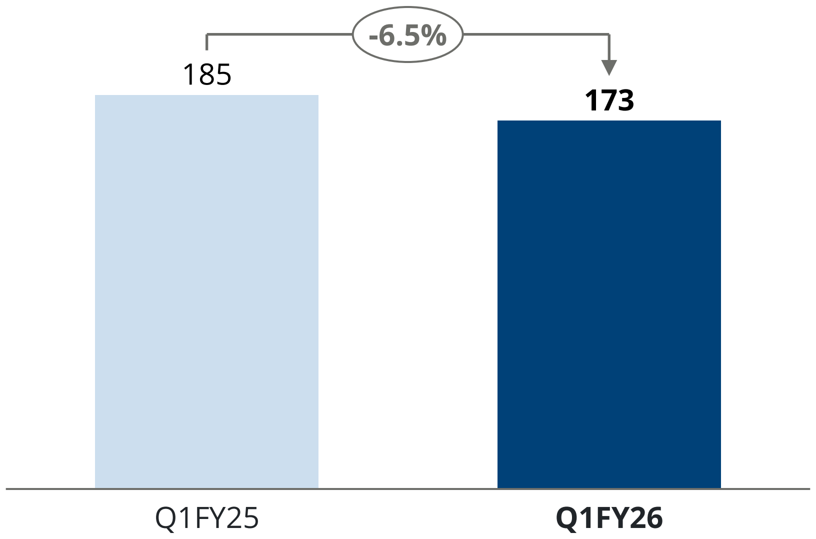
Financial Performance

Financial Snapshot

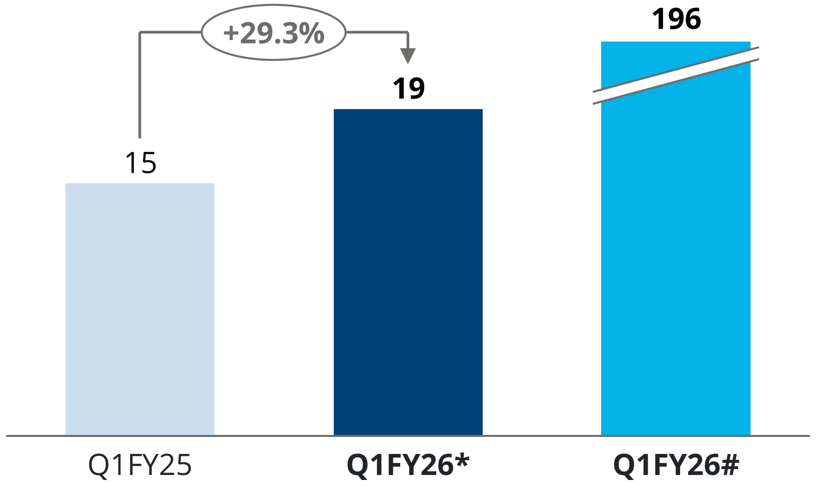
Revenue



Adj. EBITDA



Adj. PBT before exceptional items



New Business Win – Q1FY26
INR 124 Crs

Robust BD Pipeline
INR 5,300 Crs

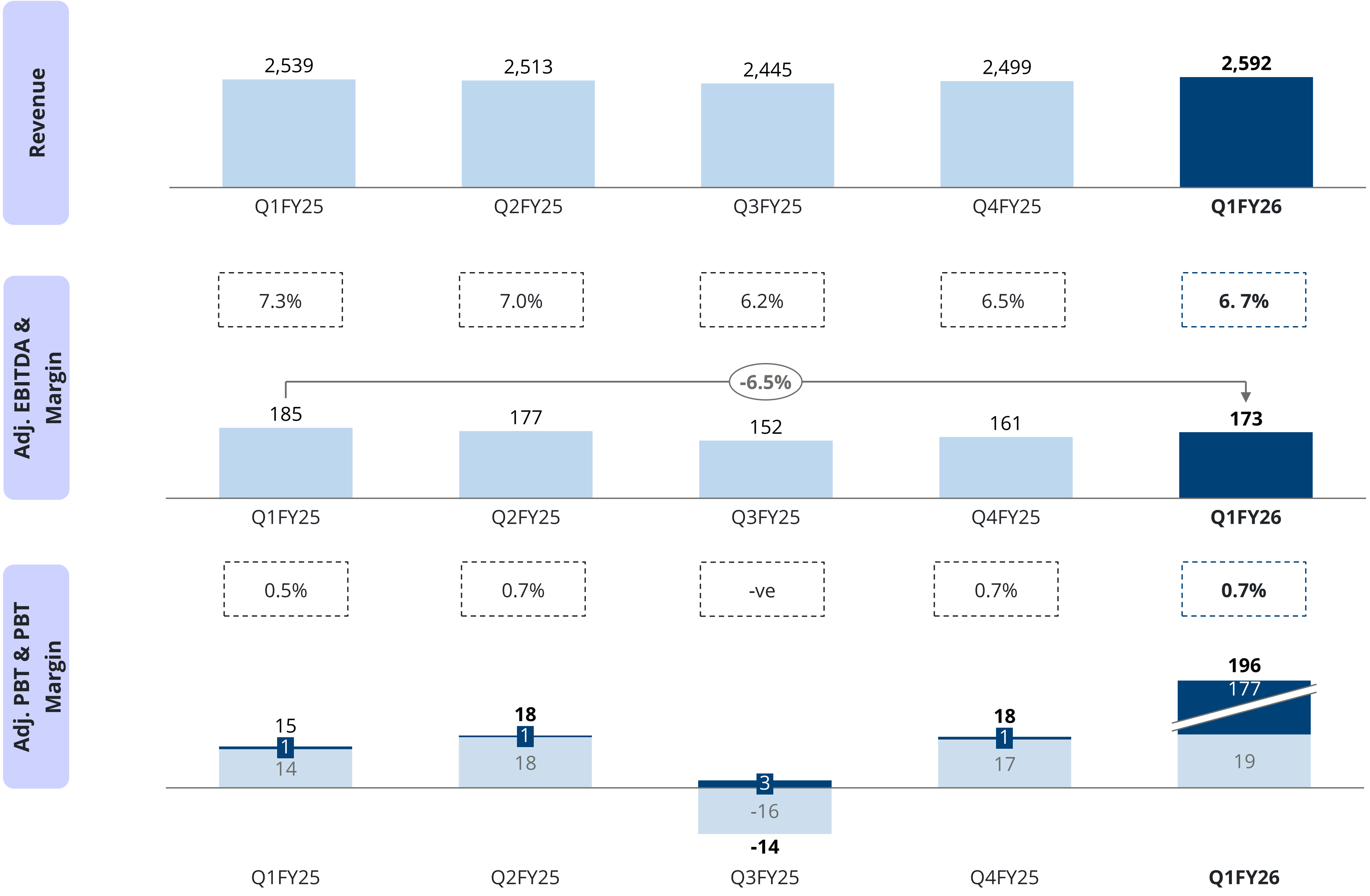
- ✓ **EBITDA :**
  - ✓ Adjusted for ESOPS & forex gain/loss, redundancy costs
- ✓ **PBT :**

  * PBT before share of profits from TVSILP, adjusted for redundancy costs

  # Adj PBT of Rs. 196 Cr includes share of profits from associate (TVS ILP) of Rs. 177.2 Cr

in INR Cr

Revenue, Adj EBITDA and Profitability



- ✓ EBITDA Adjusted for ESOPS & forex gain/loss, one time redundancy costs from Q1FY25 to Q1FY26
- ✓ PBT before Exceptional Items & Adjusted for one time redundancy costs
- ✓ PBT margin computed based on business PBT

Share of Profit from TVS ILP
Business PBT

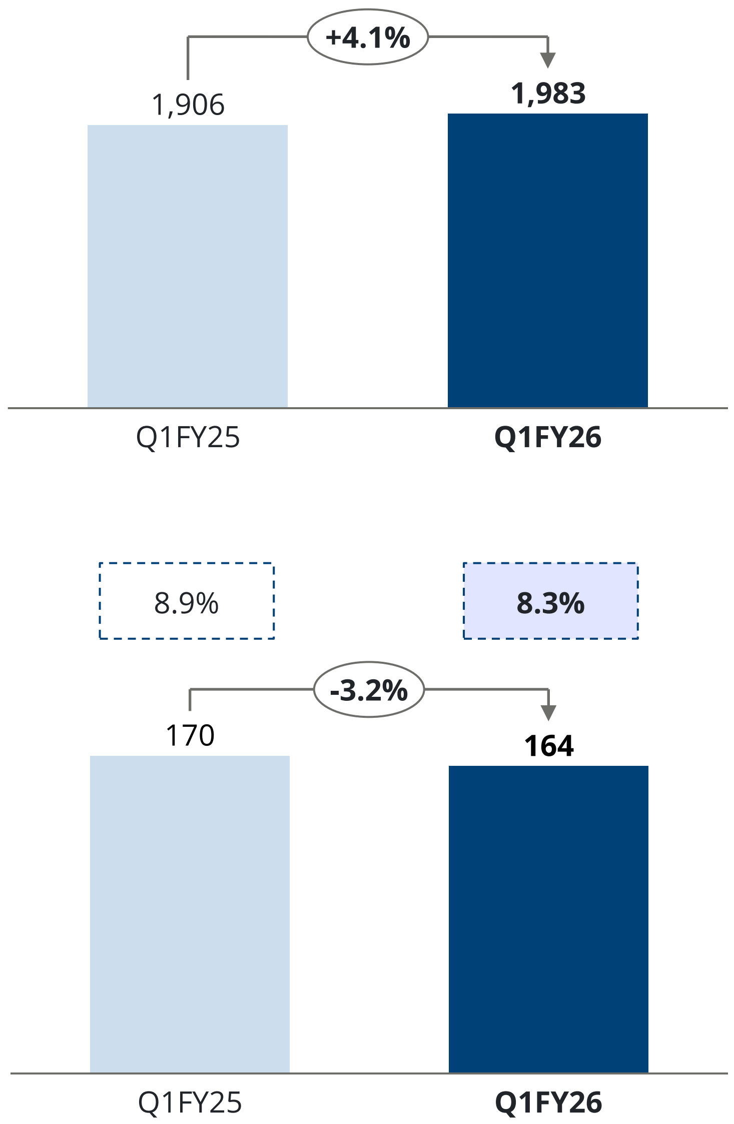
Margins

Segment wise Revenue and Adj EBITDA

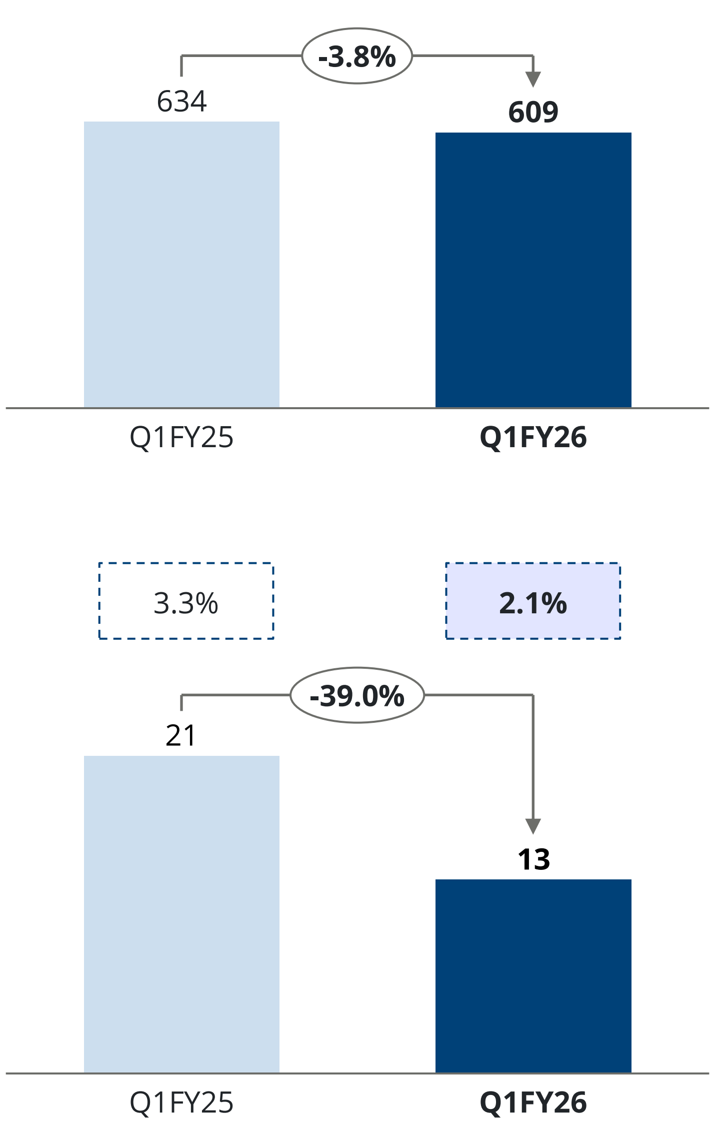
Revenue

Adj. EBITDA & Margin

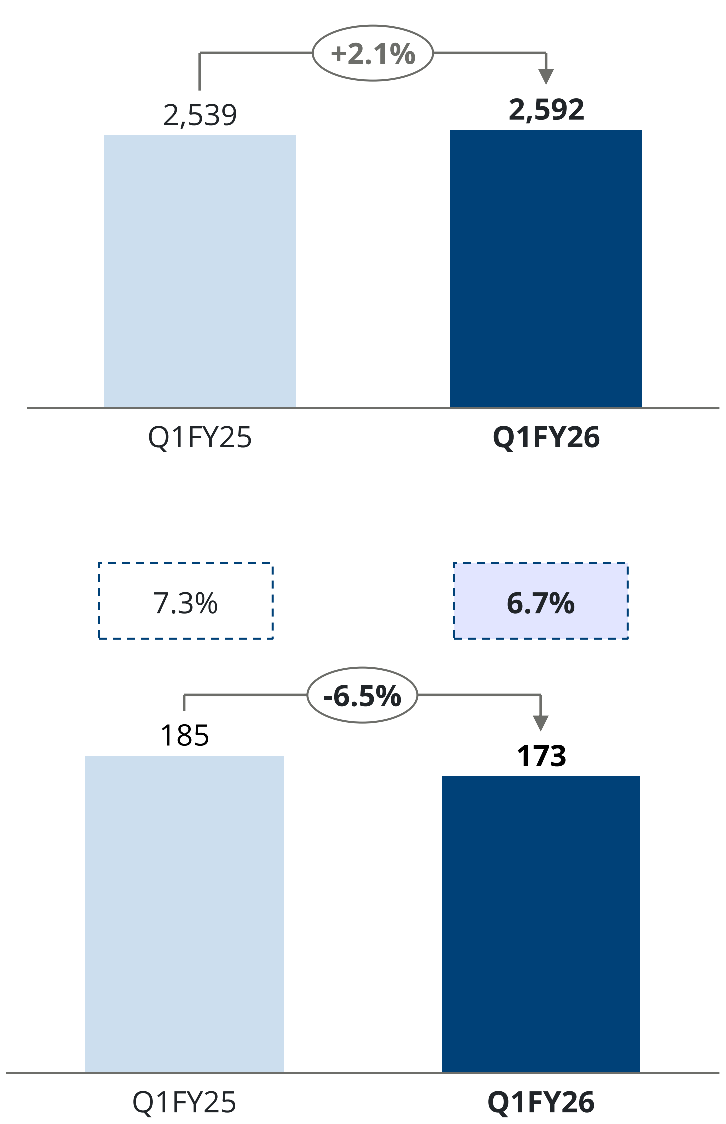
ISCS Segment (In ₹ Cr.)



GFS Segment (In ₹ Cr.)



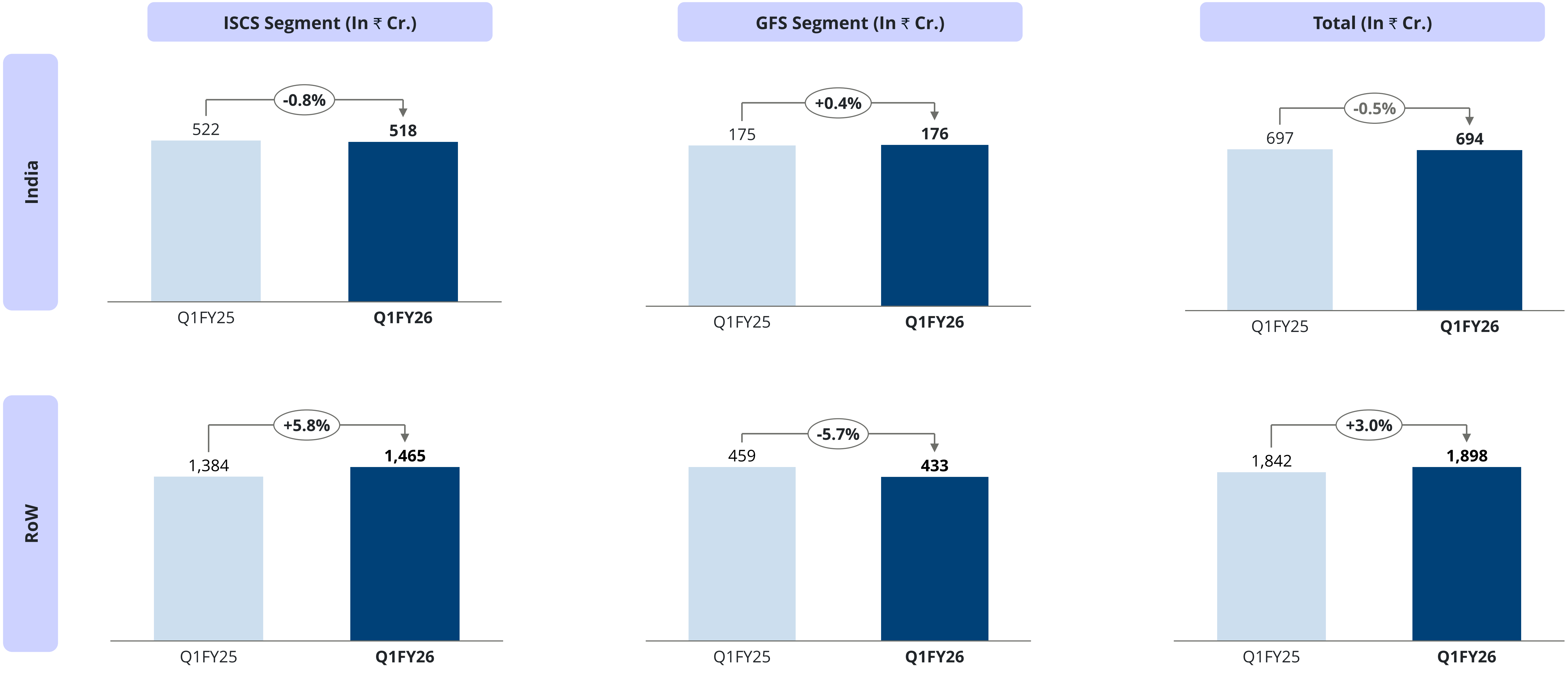
TVSSCS Consolidated (In ₹ Cr.)



Margins

Note:
- EBITDA Adjusted for ESOPS, Forex Gain/Loss and redundancy costs
- Prior period segment numbers are restated to reflect the change in segment effective Q1 FY 26

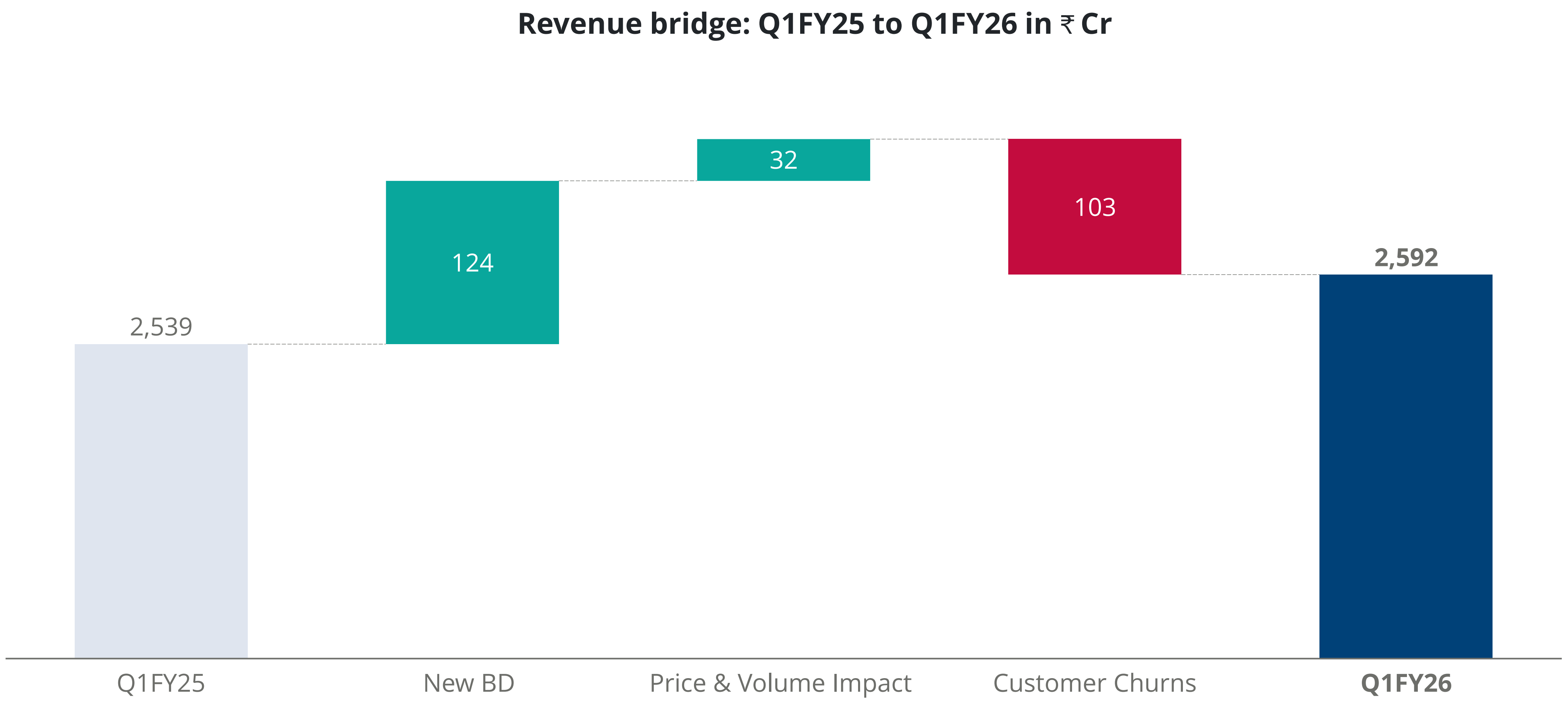
Geography wise Revenue



Note - Prior period segment numbers are restated to reflect the change in segment effective Q1 FY 26

* Net of eliminations

Revenue Bridge YoY



New Business development translates to **5%** of Q1FY25 Revenues respectively

Business development efforts yielding consistent results for Q1 FY26

ISCS

- One of the biggest Global Agri Equipment company (USA)
- India's largest diversified omni-channel retailer (India)
- Diversified global tech and entertainment leader (India)
- Premium Electric vehicle manufacturer (Asia)
- Global consulting-led IT services innovator (India)
- European telecom infrastructure services provider (UK)
- Global footwear manufacturing and retail company (India)
- German engineering and technology conglomerate (Asia)
- India based IT services and consulting firm (UK)
- Leading personal computing and printing solutions provider (UK)
- One of the top global IT services and consulting company (UK)

GFS

- Global commercial vehicles manufacturer
- Global leader in Battery technology
- Asian Multinational food and beverage firm
- Global health supplement and cosmetics firm
- International retail refrigeration equipment provider

Robust Pipeline gives us the confidence for a double-digit growth

Key Opportunities in India

- Warehousing solution to a diversified kitchen and laundry appliance leader
- Integrated solution to a global renewable energy turbine manufacturer
- Integrated solution to an Indian metals' producer
- Warehousing solution to a commercial vehicles manufacturer
- Packaging solution to an Indian two-wheeler manufacturer
- Warehousing solution to a consumer appliances provider

Key Opportunities in RoW

Near Term Opportunities

- Sourcing and Procurement solution to a UK based ports and logistics operator
- Forwarding solution to a Global mechanical and plant engineering provider
- Forwarding solution to a global digital commerce software provider
- Integrated solution to a defence infrastructure organisation
- Procurement solution to a diversified industrial technology and automation leader

Long term opportunities

- Sourcing and Procurement solution to a governmental civil protection body
- Warehousing solution to an American Electric vehicle manufacturer
- Courier solution to a Europe based healthcare provider

Q1 FY26 Profit & Loss Statement

In INR Cr - Continuing operations	Q1FY25	Q1FY26	Y-o-Y
Revenue from operations	**2,539.4**	**2,592.3**	***2.1%***
Other Income	6.4	8.7	
Total Income	**2,545.8**	**2,601.1**	***2.2%***
Total material related costs	488.7	487.4	
Freight, clearing, forwarding and handling charges	733.3	680.3	
Sub-contracting costs	343.4	377.1	
Employee Cost	576.8	618.9	
Other Expenses	212.6	256.8	
Foreign exchange loss/(gain) (net)	3.6	-5.3	
EBITDA	**181.0**	**177.2**	***-2.1%***
EBITDA Margins (%)	***7.1%***	***6.8%***	
ESOPS	0	0.17	
Foreign exchange loss/(gain) (net)	3.6	-5.3	
One Time Restructuring Cost	0.8	1.3	
Adjusted EBITDA	**185.3**	**173.3**	***-6.5%***
Adjusted EBITDA Margins (%)	***7.3%***	***6.7%***	
Depreciation of right of use asset	100.9	93.2	
Other depreciation & amortisation	34.2	37.3	
EBIT (EBITDA less depreciation)	**45.8**	**46.7**	***1.9%***
Finance cost	16.9	17.6	
Interest on lease liabilities	22.6	20.3	
Share of profit from TVSILP	1.0	177.2	
Profit before Exceptional Items & Tax	**13.8**	**194.8**	***1315.4%***
Exceptional Items	0.0	-91.3	
Profit before Tax	**13.8**	**103.5**	***652.0%***
Profit before Tax Margin (%)	***0.5%***	***4.0%***	
Tax	**6.3**	**32.3**	
Profit After Tax	**7.5**	**71.2**	***852.6%***
PAT Margins (%)	***0.3%***	***2.7%***	
PAT (before Exceptional items)	**7.5**	**162.5**	

Company Overview

A tech-driven ISCS with end to end capabilities…

Msys
Product data | Inventory | Procurement

Visibility
Warehouse management

i-ex
Transport

Analytics
Business Intelligence

Sourcing & Procurement
Master Data, e-Catalog, Forecasting & Procurement

Integrated Transportation
Planning & Optimization

Logistics Operation Centre
Production Support & In-Plant Logistics

In-Plant Logistics Operations
Inventory Planning & Optimization, Line Side Delivery

FG & AM Spares Fulfillment
Control Centre & Tracking

Closed-Loop Logistics & Support
Spares, Breakfix, Refurb & Engg. Support

Secondary Transportation
STORAGE

Courier & Consignment Management

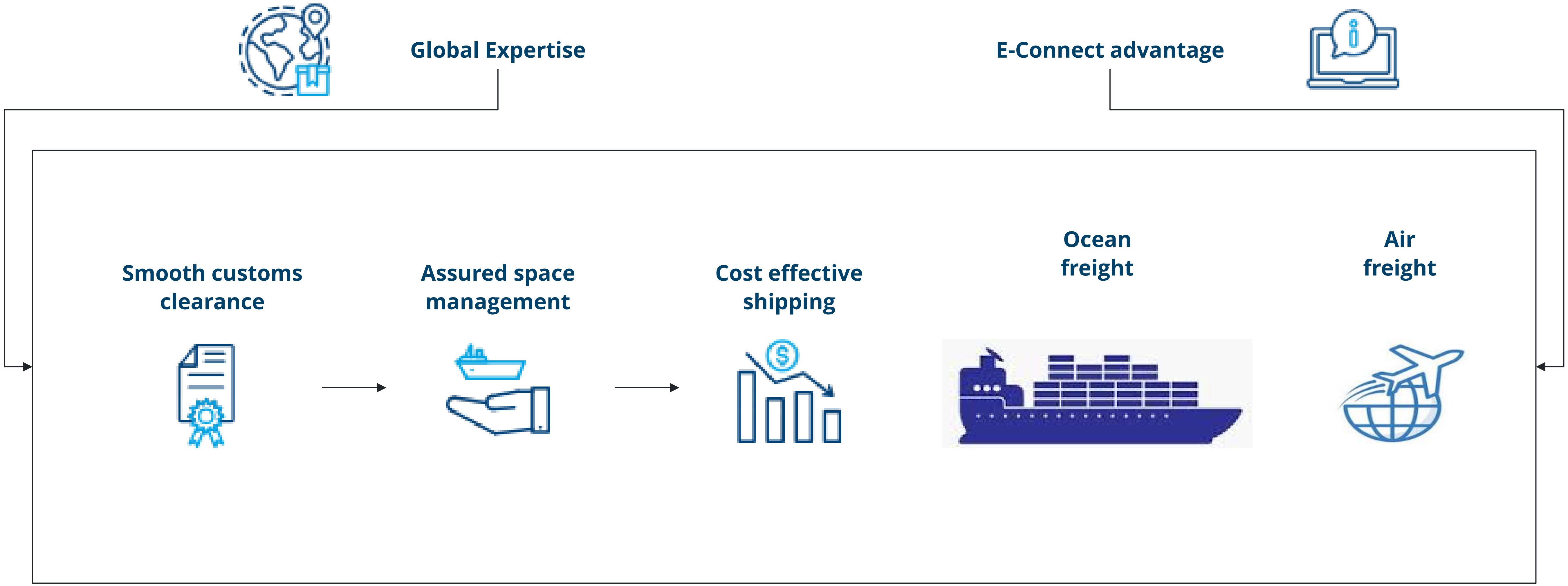
Warehouse automation & robotics

Vision technology

IoT

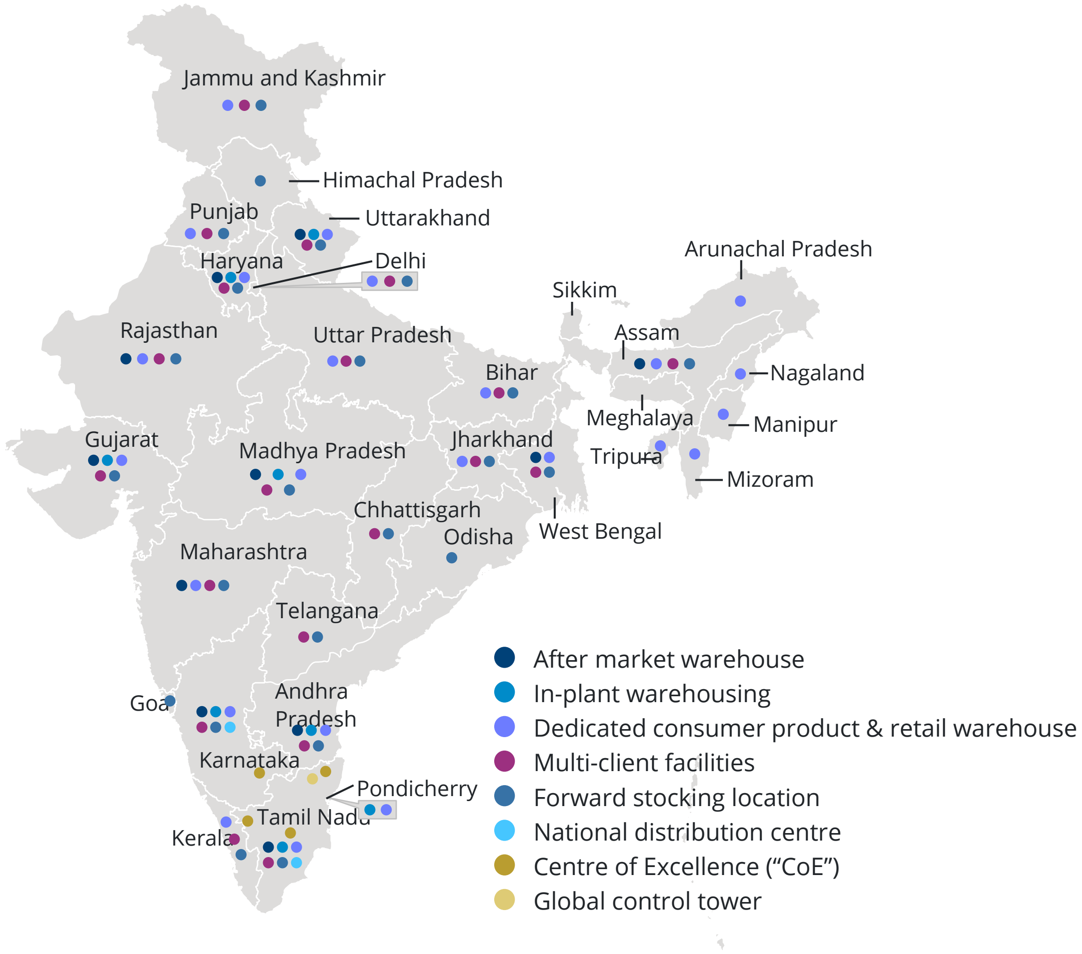
Process Automation

...And a reliable and efficient GFS...



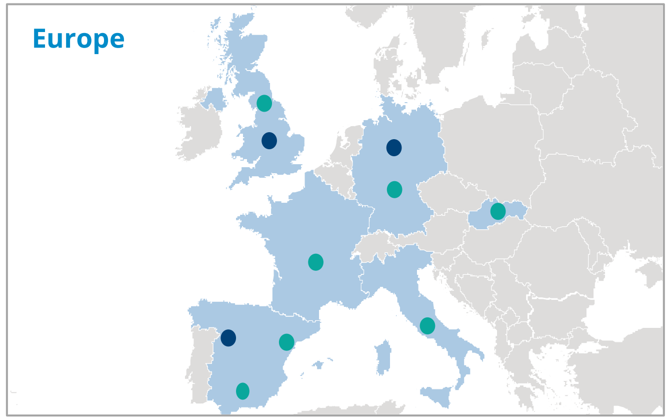
...with a global business headquartered in India...

We are present across India

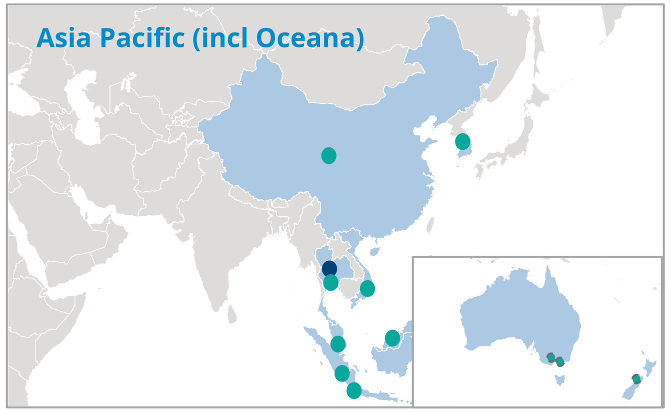


Total warehouse space: 19.9 Mn sft
No. of permanent employees: 13,012

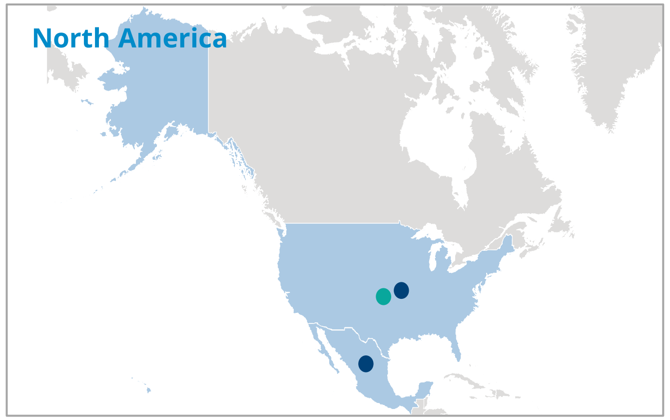
And globally across four continents



Total warehouse space: 2.1 Mn sft
No. of permanent employees: 2,571



Total warehouse space: 1.3 Mn sft
No. of permanent employees: 734



Total warehouse space: 1.4 Mn sft
No. of permanent employees: 484

Note: Warehouse space and employee count data as of 31 Mar 2025

...and Experienced Management Team

R. Dinesh
Executive Chairman

Ravi Viswanathan
Managing Director

R Vaidhyanathan
Global CFO

Regional CEOs

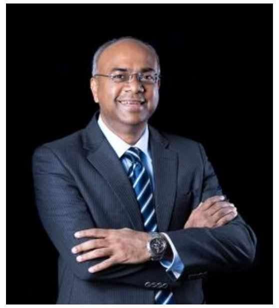
Kameswaran Sukumar
CEO, India, Middle East & Africa Business

Richard Vieites
CEO, Europe & North America Business

Jonathan Croydon
EVP, UK & Europe Business

Vittorio Favati
CEO, APAC Region & GFS Business

Global Functional leads



Ethirajan Balaji
Global CHRO

Dinesh Narayan
Global CIO & Legal

Strategies for Growth : 3C Approach

We identify opportunities using the 'C3 Framework' in the three C's - Customer, Capability and Country

1 CUSTOMER

- ✓ Deepen our customer relationships
- ✓ Acquire New Customers

We started with offering single service to a customer and subsequently we have been able to expand this relationship and started to offer bundle of services to them across regions

2 CAPABILITIES

- ✓ Continued innovation and investment in technology
- ✓ Continued focus on delivering value-added solutions and building end-to-end Capabilities
- ✓ Continue to invest in team, talent, and partners

We have added multiple capabilities over the years in order to continue to enhance our customers supply chain and achieve higher efficiency in our operations throughout the whole supply chain

3 COUNTRY

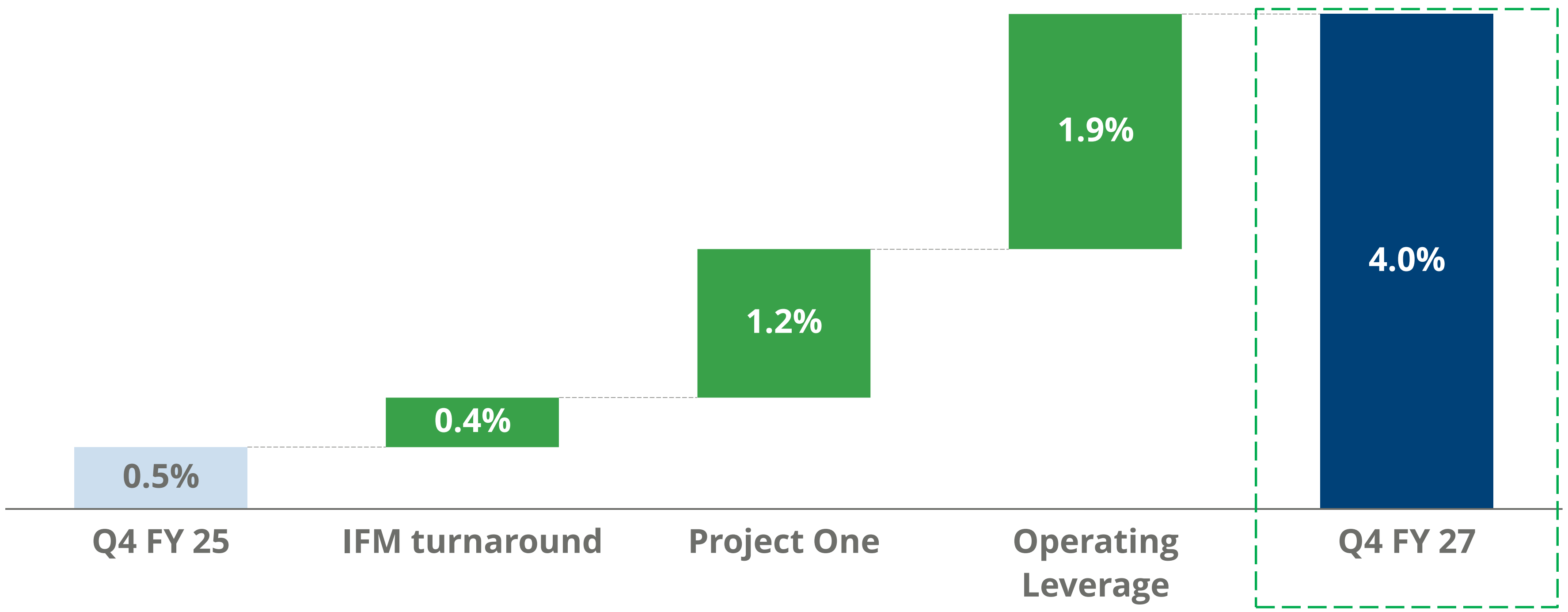
- ✓ Leverage our global network to expand into new markets
- ✓ Deepen presence in a country
- ✓ Continue to grow our global platform through targeted inorganic opportunities

Over the years we have expanded our geographical presence enabling us to accelerate growth, realize higher revenue and cost synergies and increase margins

Our strategy revolves around ***ENCIRCLEMENT*** which focuses on increasing the wallet share of existing customers by generating incremental business by increasing the scope of our services

Our Medium-Term Outlook

Profit Before Tax Margin (%)



Medium Term Goals

Industry Best-in-Class*

PBT Margin:
8 - 11%

*Profile of Global Peers

Our Growth Vision

Region wise segmental historical Overview

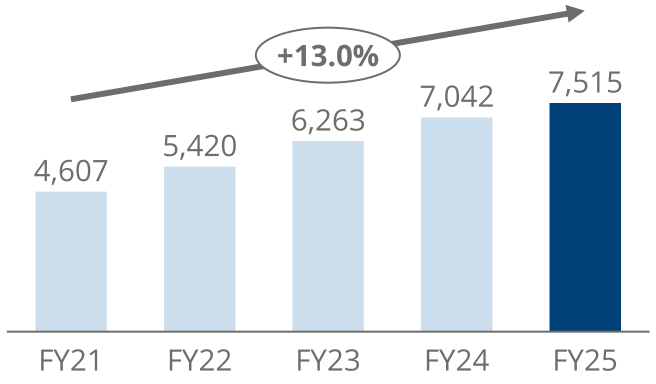
TVS Supply Chain Solutions

ISCS Outperforming the GDP growth Regionally

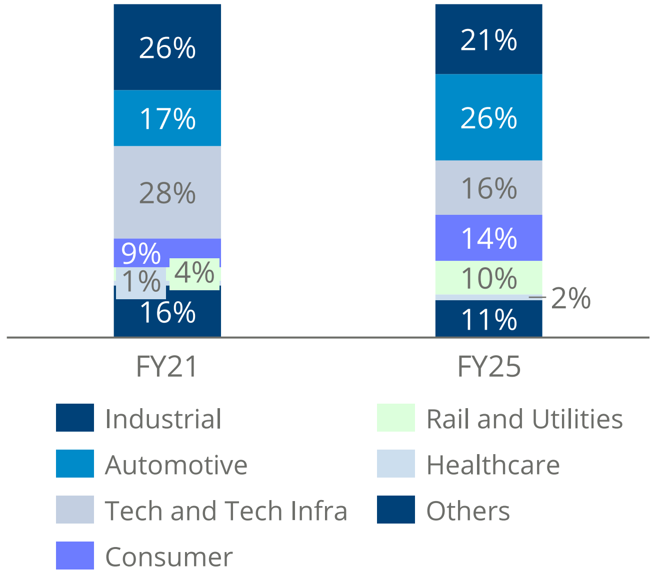
De-coupled to GDP growth

Continued Revenue Momentum

Consolidated ISCS Revenue



Consolidated Industry Wise Breakup

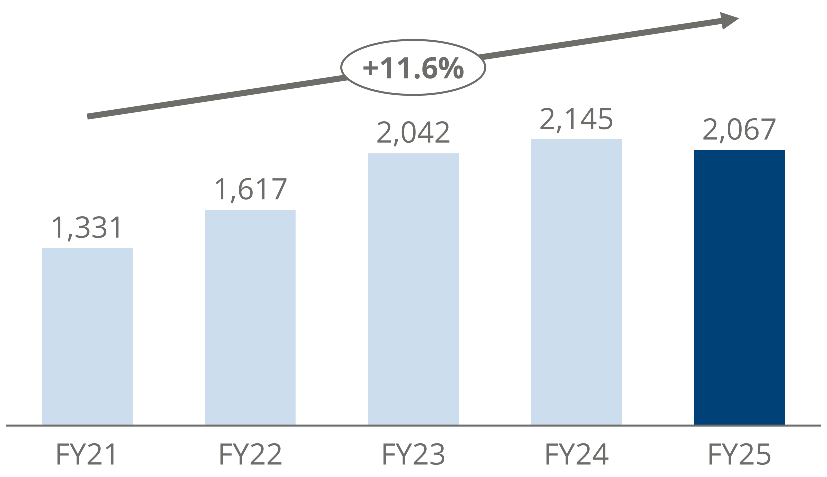


Our ISCS business has outperformed the GDP growth in the market we operate and has **grown at a CAGR of 13.0%** between FY21 & FY25

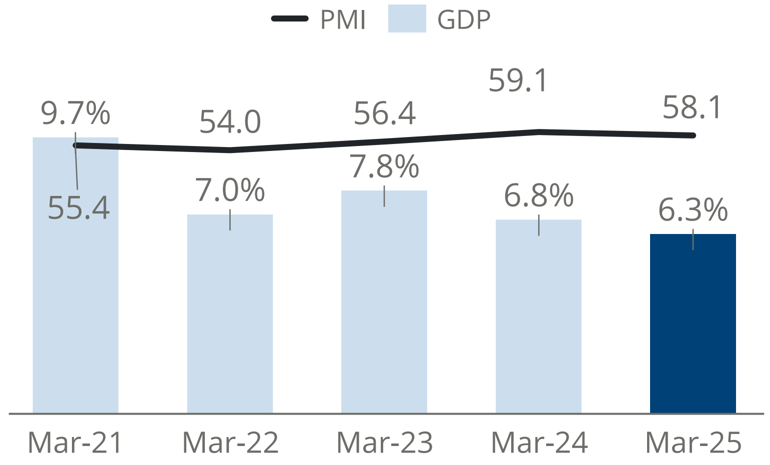
Note - Prior period numbers are restated to reflect the change in segment effective Q1 FY 26

ISCS – India Business

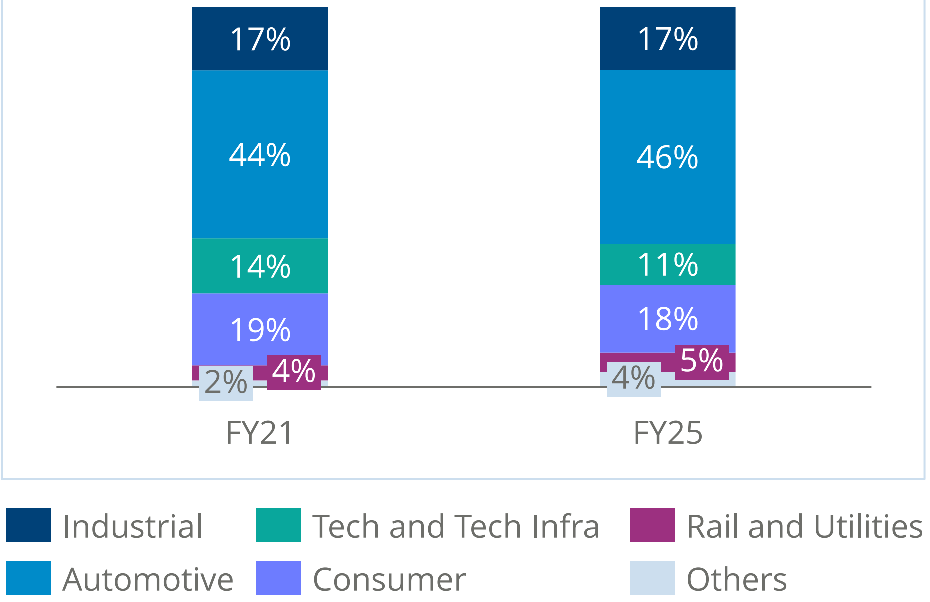
ISCS India Revenue



India GDP & Manufacturing Growth



De-Risking with Diversification



Key KPI

Top 20 Customers

Average length of contracts

3.9 Years in FY25

Addition of new contracts & wallet share addition has enhanced the avg. revenue per contract by **~13% CAGR** in FY25 over FY21

ISCS India business grew by

11.6% CAGR

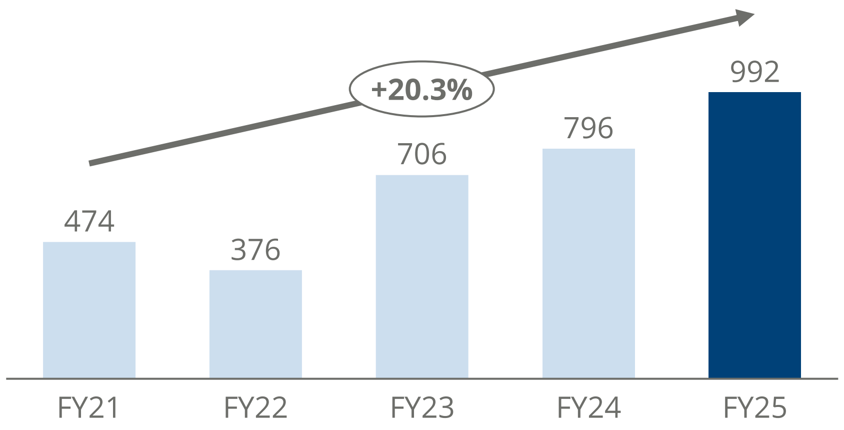
over the last 4 years, outperforming the India GDP growth

Outlook :

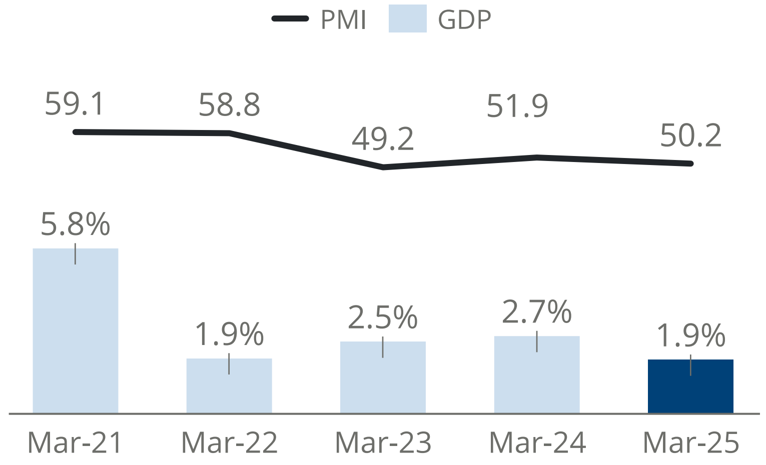
Strategic portfolio realignment marginally impacted top line, but drives stronger bottom-line margins; FY26 to see strong growth momentum

ISCS – North America Business

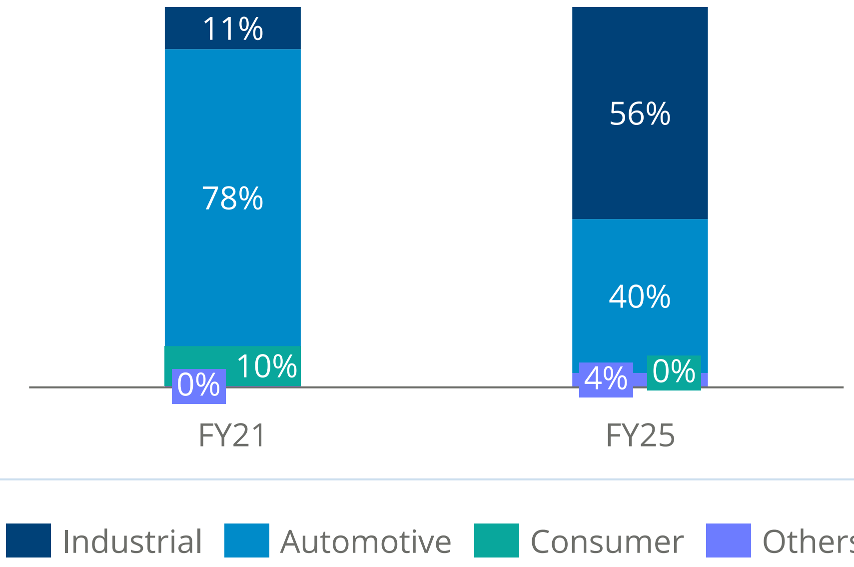
ISCS North America Revenue



US GDP & Manufacturing Growth



De-Risking with Diversification



Key KPI

Top 20 Customers

Average length of contracts

4.2 Years in FY25

Addition of new contracts & wallet share addition has enhanced the avg. revenue per contract by **~33% CAGR** in FY25 over FY21

ISCS North America business grew by

20.3% CAGR

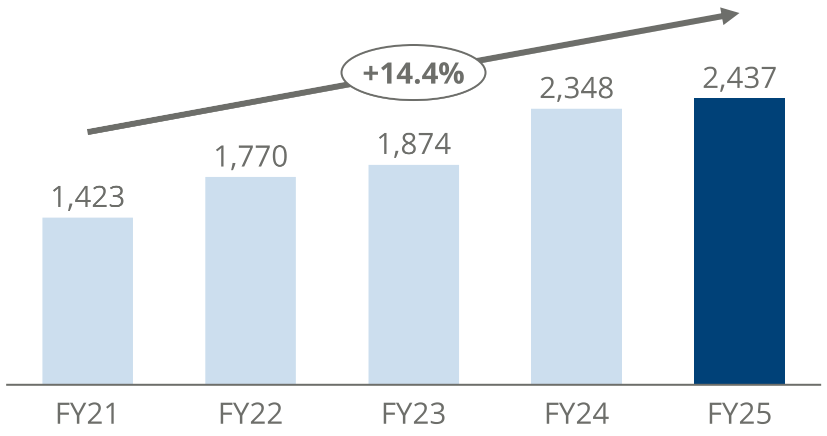
over the last 4 years, outperforming the US GDP growth

Outlook :

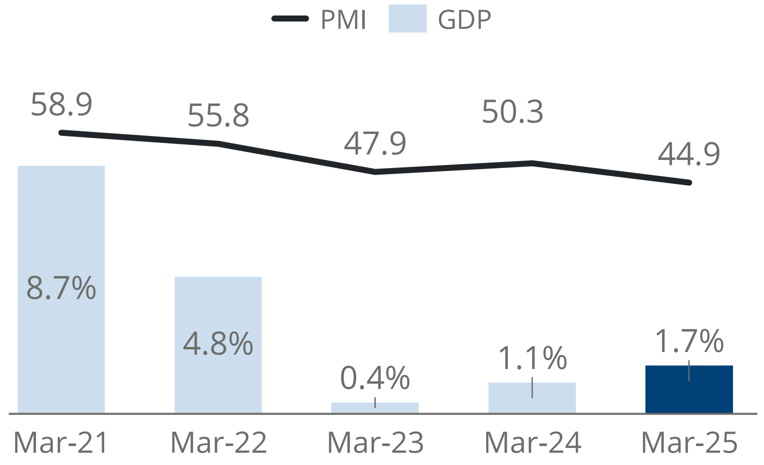
We have witnessed strong and consistent growth in our North America business. With continued momentum, we expect this trajectory to sustain through FY26, further strengthening our global portfolio

ISCS – Europe Business

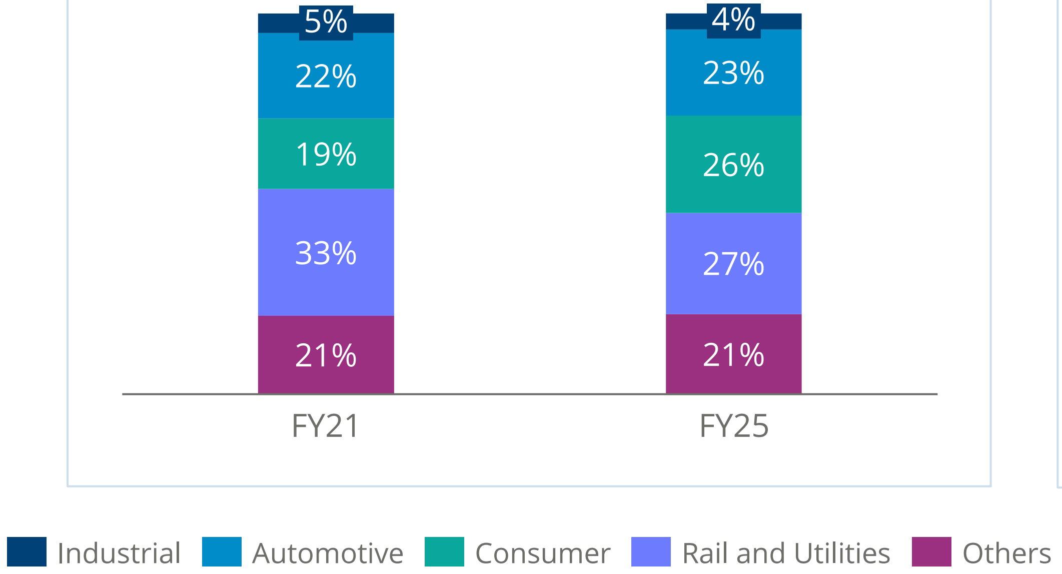
ISCS Europe Revenue



UK GDP & Manufacturing Growth



De-Risking with Diversification



Key KPI

Top 20 Customers

Average length of contracts

7.0 Years in FY25

Addition of new contracts & wallet share addition has enhanced the avg. revenue per contract by **~16% CAGR** in FY25 over FY21

ISCS Europe business grew by

14.4% CAGR

over the last 4 years, outperforming the UK GDP growth

Outlook :

Europe has consistently delivered growth every year. Setback in Q3 FY25 performance is a one-off event

IFM Performance

Revenue

₹1,852 Crs

Countries

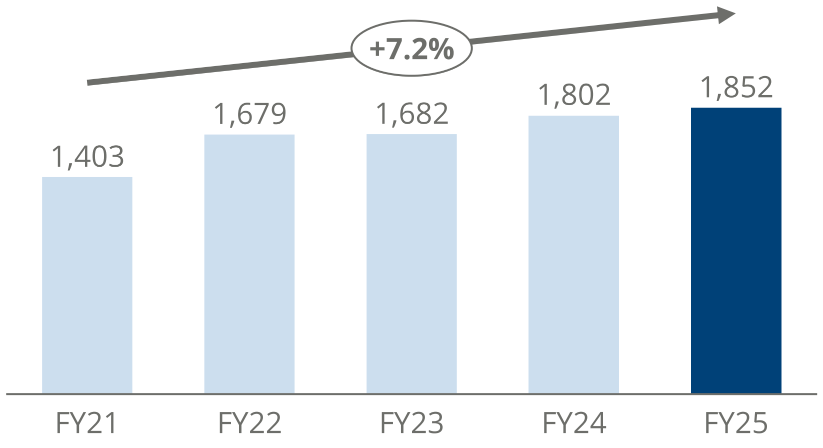
9

Customers

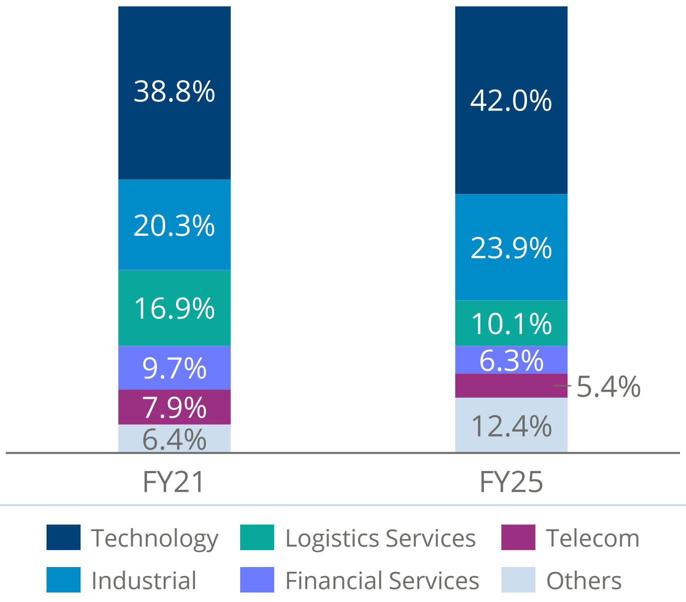
1,092

FY25

Demonstrated Growth in Revenues*



Diversified across industries



New Order Wins Continue…

- ✓ New order wins for FY25 were strong, amounting to **36% of our FY21 revenues**, reflecting continued growth momentum and successful customer acquisition.
- ✓ Additionally, we undertook price increases with significant number of customers during the year, supporting our margin improvement efforts and reinforcing the value we deliver across our services.

Key Highlights

✓Successfully turned around operations by Q4FY25 led by cost efficiencies and price increases with customers

✓Revenue continues to be steady on account of new business development and encirclement

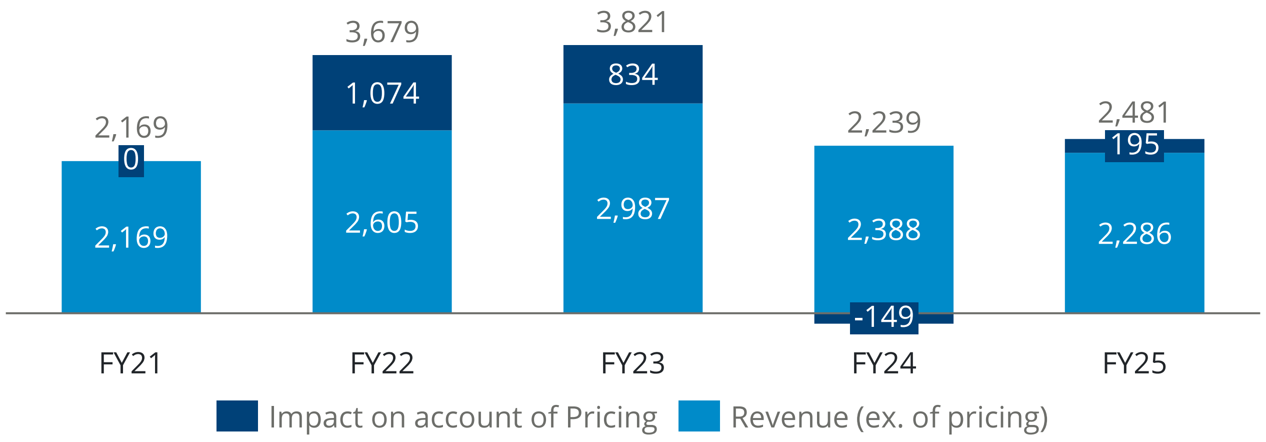
Outlook

Upward growth momentum in both revenue and profitability to continue driven by operational efficiencies

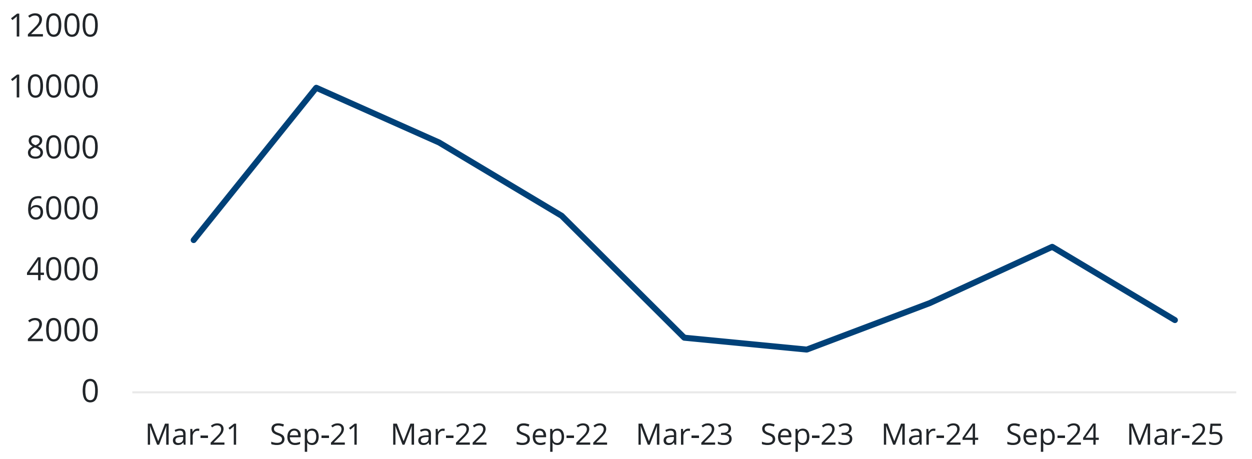
*Prior period financials presented for Continuing Operations; post classification of Circle Express as discontinued business

GFS Performance

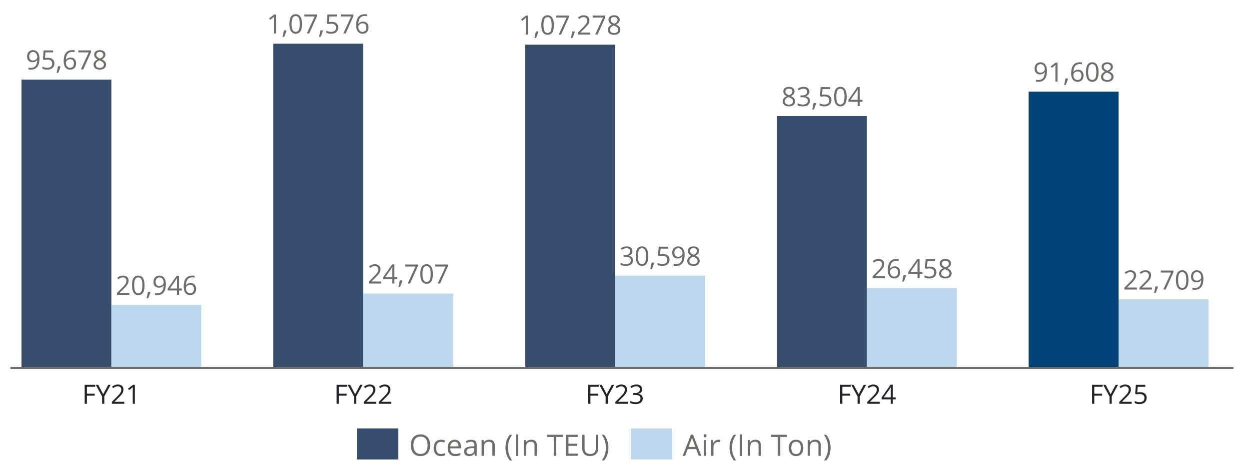
Revenue from Operations with Impact due to Pricing



World Container Index ($ per 40ft. Container)



Volumes



Outlook

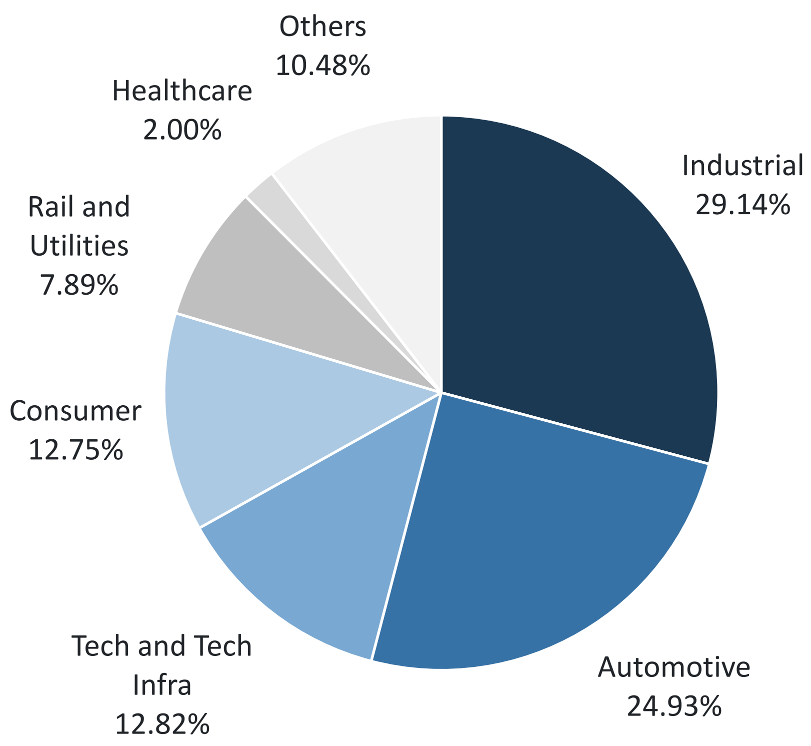
- ✓ The GFS segment continues to be sensitive to broader macroeconomic fluctuations, which may impact pricing and demand dynamics
- ✓ Targeted cost reduction initiatives have been implemented to partially offset these challenges and will continue to be implemented, helping to preserve margin stability and enhance business resilience

Note – FY 25 numbers are restated to reflect the change in segment effective Q1 FY 26

Diverse customer base with long term relationships

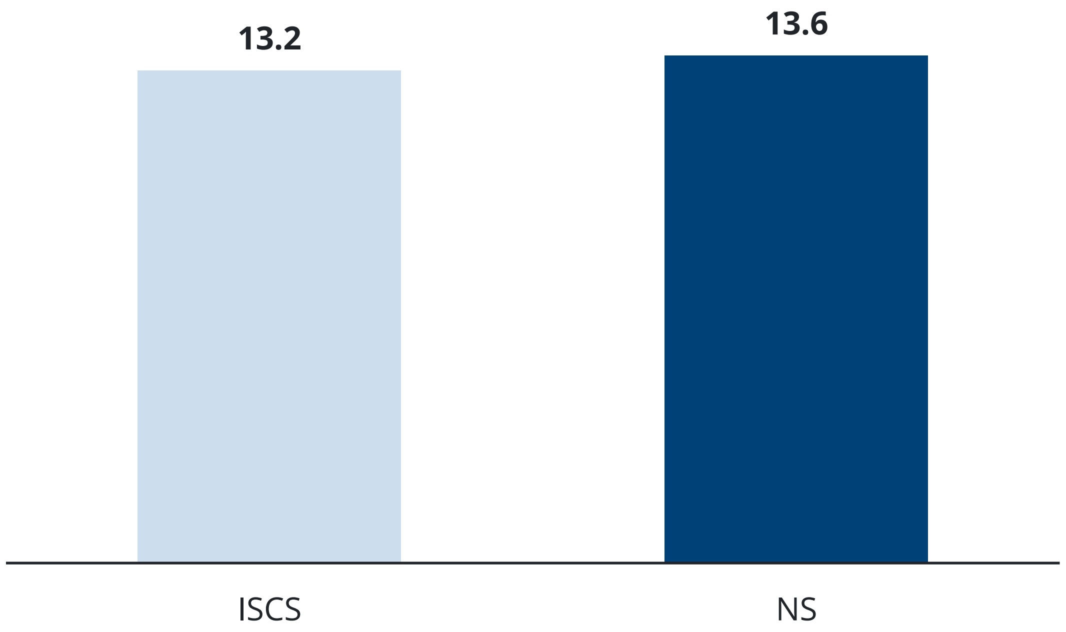
Diversified customer base

Consolidated Revenue by customer sector (FY25)



Long term customer relationships

Avg. length of relationships: of top 10 customers in FY25



No. of Fortune 500 customers	FY22	FY23	FY24	FY25
	61	72	78	91

Thank You

Company: TVS Supply Chain Solutions Limited

CIN: L63011TN2004PLC054655

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