



12th August, 2025

National Stock Exchange of India Ltd.

Exchange Plaza, C – 1, Block G
Bandra-Kurla Complex, Bandra (E),
Mumbai-400 051
Symbol: UNIECOM

BSE Limited

Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai 400 001
Scrip Code: 544227

Subject: Update under Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 ('SEBI Listing Regulations')

Reference: Audited (Standalone & Consolidated) Financial Results for the quarter ended on 30th June, 2025

Dear Sir/Madam,

Greetings from Unicommerce eSolutions Limited.

Pursuant to Regulation 30 of SEBI Listing Regulations, as amended from time to time, and in continuation to our earlier communication sent on 5th August, 2025, we are enclosing the Investor Presentation for the Audited (Standalone and Consolidated Financial Results for the quarter ended on 30th June, 2025.

The same is available on the website of the Company at <https://unicommerce.com/>

Please take the aforesaid in your records and oblige.

Thanking you.

For Unicommerce eSolutions Limited

Anil Kumar
Company Secretary
Membership No. F8023

Encl: As above

Unicommerce eSolutions Ltd.

Registered Office: Mezzanine Floor, A-83, Okhla Industrial Area Phase-II, New Delhi 110020 India

Corporate Office: M3M Urbana Business Park, Tower B, 9th Floor, Sector 67, Gurugram 122001, Haryana, India

Tel +91-888 7790 22, email: contactus@unicommerce.com | Web: www.unicommerce.com

CIN: L74140DL2012PLC230932



Simplifying E-commerce

Investor Presentation – Q1 FY26

One Stop for All **E-commerce Automation** Needs



Disclaimer

This presentation and the accompanying slides (the “Presentation”), which have been prepared by Unicommerce eSolutions Limited (the “Company”), have been prepared solely for information purposes and do not constitute any offer, recommendation or invitation to purchase or subscribe for any securities, and shall not form the basis or be relied on in connection with any contract or binding commitment whatsoever. No offering of securities of the Company will be made except by means of a statutory offering document containing detailed information about the Company.

This Presentation has been prepared by the Company based on information and data which the Company considers reliable, but the Company makes no representation or warranty, express or implied, whatsoever, and no reliance shall be placed on, the truth, accuracy, completeness, fairness and reasonableness of the contents of this Presentation. This Presentation may not be all inclusive and may not contain all of the information that you may consider material. Any liability in respect of the contents of, or any omission from, this Presentation is expressly excluded.

Certain matters discussed in this Presentation may contain statements regarding the Company’s market opportunity and business prospects that are individually and collectively forward-looking statements. Such forward-looking statements are not guarantees of future performance. The statements in this Presentation are subject to known and unknown risks, uncertainties and assumptions that are difficult to predict. These risks and uncertainties include, but are not limited to, the performance of the industry in India and world-wide, competition, the company’s ability to successfully implement its strategy, the Company’s future levels of growth and expansion, technological implementation, changes and advancements, changes in revenue, income or cash flows, the Company’s market preferences and its exposure to market risks, as well as other risks.

The Company assumes no obligation to update any forward-looking information contained in this Presentation. Any forward-looking statements and projections made by third parties included in this Presentation are not adopted by the Company and the Company is not responsible for such third-party statements and projections. The information contained in this presentation is subject to change without any obligation on the Company to notify any person of such revisions or change. Past performance is not indicative of future results. This Presentation shall not be deemed as tax, legal or investment advice or opinion regarding the specific investment objectives or financial situation of any person.



Unicommerce offers an extensive suite of AI-enabled SaaS products across e-commerce value chain for brands and sellers



Detailed Analytics and 20+ Additional Features to Automate eCommerce Businesses

Marquee clients base uses Unicommerce's eCommerce Stack



7,174¹
Clients

Fashion, Footwear & Accessories



Beauty, Personal Care & FMCG



Pharma, Nutrition & Medical



Home & Services



Electronics



Brand Aggregators & House of Brands



International





Kapil Makhija
MD & CEO

"Q1 FY26 marked a strong start to the year, with continued scale and meaningful product upgrades across our platforms.

Our international business for the Uniware platform maintained its positive momentum and achieved operational profitability during the quarter. We expanded our relationship with a key client in the Middle East and secured a significant contract in South-east Asia, representing a key milestone in our international operations. In addition, we also commercially launched our payment reconciliation module, UniReco, to enhance value for our clients. Uniware achieved an annual transaction run-rate of over 1 billion order items, matching the high-volume Diwali quarter of FY25.

We introduced multiple product enhancements on Uniware, including 'Blink Mode' to accelerate high-volume workflows, expanded capabilities for B2B and quick commerce order management, and multilingual support for invoices and labels. New client additions remained strong, with 88 new clients acquired in Q1 FY26, including established traditional and D2C brands such as Ajanta Shoes, Himalaya Wellness, Rupa, Lacoste, Richlook, SuperYou, Beyond Snack and Eat Better Co.

Shipway continued to see strong adoption from new and existing customers. We introduced several enhancements aimed at improving user experience and expanding integrations. Aligned with our focus on profitability, we reviewed and restructured select low-margin accounts, enabling Shipway to become PAT positive in this quarter. Convertway progressed steadily, with feature additions focused on improving WhatsApp message deliverability and introducing multi-agent support for the customer support module. Internally, we continue to embed AI across our operations, with applications including code development, improved ticket resolution, and enhanced productivity in client support functions.

Our focused execution allowed us to enhance operational performance while continuing to invest in long-term platform development. As we look ahead in FY26, we remain committed to disciplined execution, deepening client relationships, and strengthening platform capabilities."



Anurag Mittal
CFO

"Q1 FY26 marked a strong start to the fiscal year, reflecting both top-line momentum and continued improvement in operating profitability. Our Consolidated revenue for the quarter reached ₹449.3 million, reflecting a year-over-year increase of 63.6%. Adjusted EBITDA rose by 112.0% YoY to ₹94.7 million, with margins expanding from 16.3% to 21.1%. Profit After Tax increased to ₹38.9 million, representing a 10.8% YoY growth.

The lower PAT growth compared to Adjusted EBITDA growth reflects amortisation expenses of ₹33.2 million related to intangible assets recognised from the acquisition of Shipway Technology Private Limited, in accordance with applicable accounting standards. Excluding this non-cash expense, PAT for the quarter would have been ₹63.7 million, representing a year-over-year increase of 81.5%.

The revenue performance was supported by the sustained scale of Uniware and continued growth momentum in Shipway. Our profitability improvement reflects disciplined cost management, use of AI to improve operational efficiency, and PAT-positive performance by Shipway. These results highlight the resilience of our operating model and our ability to deliver efficient growth.

During the quarter, we implemented Oracle as our financial ERP platform to strengthen internal systems and controls. Beginning Q2 FY26, we will transition to using this ERP system for our financial management and reporting needs.

As we continue to expand relationships with existing clients, onboard new accounts, and invest in strengthening our platforms to unlock additional business opportunities, we remain focused on maintaining financial discipline and advancing sustainable, profitable growth."

Q1 FY26 – Key Highlights

- **Revenue** in Q1 FY26 increased to **₹449.3 million, up 63.6% YoY**
- **Adjusted EBITDA, reflecting operating profitability**, increased **₹94.7 million, up 112.0% YoY**
- **PAT, excluding non-cash amortisation expense** for Shipway acquisition, is **INR 63.7 million, up 81.5% YoY**
- Uniware's **international operations achieved operating profitability**
- **UniReco was commercially launched** and continues to receive positive feedback
- Uniware reached a **1 billion+ annual transaction run-rate in a regular quarter**, matching FY25's festive quarter
- **Shipway became PAT profitable**, following Adjusted EBITDA break-even in the last quarter
- **Enterprise client acquisitions remain strong**, including established traditional and D2C brands
- **Continued platform enhancements** to drive revenue growth and retention in the future

Q1 FY26 – Consolidated P&L Highlights

63.6% YoY Revenue growth and 112.0% Adj. EBITDA growth

xx% Margins%

Revenue

INR (Mn)

274.7

449.3

Q1 FY25

Q1 FY26

▲ 63.6% YoY ^

Adjusted EBITDA¹

INR (Mn)

16.3%

21.1%

44.7

94.7

Q1 FY25

Q1 FY26

▲ 112.0% YoY ^

Profit After Tax

INR (Mn)

12.8%

8.7%

35.1

38.9

Q1 FY25

Q1 FY26

▲ 10.8% YoY ^

PAT, excluding non-cash amortisation expenses related to Shipway acquisition, in Q1 FY26 is INR 63.7 million, up 81.5% YoY

Uniware onboarded 88 new enterprise clients in Q1 FY26

Apparel

Footwear

Innerwear

Fitness



Personal Care

FMCG

Toys

Education



We continue to enhance our platforms and incorporate AI to increase revenue potential as well as reduce costs and boost productivity (1/3)

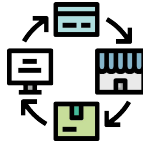
Product enhancement initiatives to increase retention and grow revenue



UniReco

Commercially launched Unireco payment reconciliation across marketplaces

Wholesale



B2B Workflows

Optimised processes for large-volume orders, including multi-list picking and multi-facility fulfilment for improved efficiency and fill rates



Quick Commerce

Implemented additional automations to make quick commerce order processing faster

One Click Dispatch



Blink Mode

Launched 'Blink Mode' for faster dispatches with fewer clicks to cater to smaller sellers who do not follow extensive WMS processes



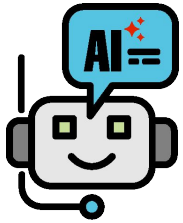
Order & Returns Management

Enhanced bundled returns handling, advanced kitting/bundling for sales readiness, and introduced multi-lingual invoice /labels with Indian languages

Leveraging AI for faster development and efficient daily operations

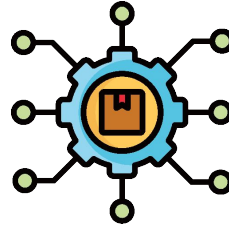
We continue to enhance our platforms and incorporate AI to increase revenue potential as well as reduce costs and boost productivity (2/3)

Product enhancement initiatives to increase retention and grow revenue



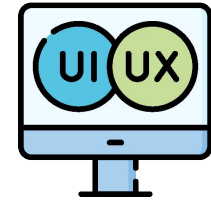
Loca – AI Support Chatbot

Enabled self-service query resolution across tracking, RTOs, PODs, and COD remittance queries for end customers of brands using AI



Courier Integrations & Slabs

Expanded courier network and integrations with more <500g and >2kg weight slab options to enhance shipping flexibility



UX & Workflow Enhancements

Refined courier assignment interface for simplified access and with performance-based courier ratings to better inform users

Leveraging AI for faster development and efficient daily operations

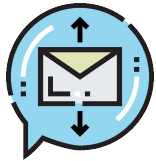
We continue to enhance our platforms and incorporate AI to increase revenue potential as well as reduce costs and boost productivity (3/3)

Product enhancement initiatives to increase retention and grow revenue

Initiatives to decrease cost

Convert
way

Auto Retry



Auto-Retry for WhatsApp

Improved deliverability with configurable retry logics for undelivered messages



Integrated Payment Collection

Enabled prepaid payments collection and tracking via payment links in chat



Multi-agent Whatsapp Support

Deployed multi-agent capability with agent-level controls and automated assignment to manage scale efficiently



Operations and Support

Improved productivity through product enhancements, use of AI, automation, and trainings to reduce client queries and building new features with increased efficiency

Leveraging AI for faster development and efficient daily operations

We continue to undertake targeted education and outreach initiatives across multiple channels to build awareness and attract new clients (1/4)

Offline Events



e-Kumbh, Jaipur



e-Kumbh, Jaipur

Online Webinars



unicommerce

Simplifying Quick Commerce Challenges with Unicommerce

Automate quick commerce operations and eliminate manual bottlenecks to enhance efficiency.

Host
Rachit Srivastava,
Director-Product at Unicommerce

Guest Speaker
Suyash Chandak
Director-Inventory at Blinkit

One Stop For All E-Commerce Automation Needs www.unicommerce.com

Webinar on Quick Commerce

We continue to undertake targeted education and outreach initiatives across multiple channels to build awareness and attract new clients (2/4)

Press & Awards

Business Standard

[Home](#) / [Markets](#) / [Capital Market News](#) / Eat Better Co partners with Unicommerce

Eat Better Co partners with Unicommerce

[Home](#) / [Content](#) / [Press Releases ANI](#) / Unicommerce Announces Pan-India Launch of UniReco

Unicommerce Announces Pan-India Launch of UniReco

MEDIA BRIEF

Shipway by Unicommerce turns e-commerce returns into a customer retention engine

By mbdesk2 - May 1, 2025



Unicommerce launches 'Blink Mode' to accelerate multi-channel order processing for e-commerce brands

By MBDesk1 - June 2, 2025

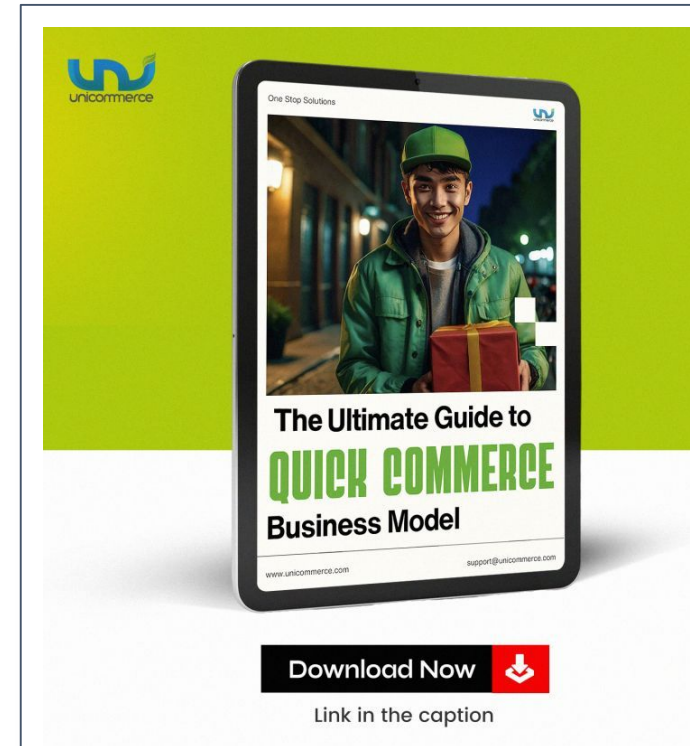


We continue to undertake targeted education and outreach initiatives across multiple channels to build awareness and attract new clients (3/4)

Insights, Best Practices and E-books



Unireco Teaser



Quick Commerce E-book

We continue to undertake targeted education and outreach initiatives across multiple channels to build awareness and attract new clients (4/4)

Testimonial

Podcasts



Raj Vikram Gupta
Co-founder, Beastlife



Arjun Vaidya
Founder, Dr. Vaidya's &
Co-Founder, V3 Ventures



Saloni Anand
Co-Founder, Traya

Key Performance Indicators – Q1 FY26

Financial numbers in INR Million

| KPIs [^] | Q1 FY26 | Q4 FY25 | Q1 FY25 | QoQ Growth | YoY Growth | FY25 |
|---|---------|---------|---------|------------|-------------|---------|
| Revenue from contract with customers ¹ | 449.3 | 452.7 | 274.7 | (0.8%) | 63.6% | 1,347.9 |
| Total Income | 457.6 | 463.4 | 290.2 | (1.2%) | 57.7% | 1,402.0 |
| Total Expense | 406.1 | 415.4 | 242.8 | (2.2%) | 67.2% | 1,160.9 |
| Gross Margin% ² | 54.2% | 55.6% | 78.5% | (139 bps) | (2,430 bps) | 69.4% |
| Adj. EBITDA ³ | 94.7 | 88.8 | 44.7 | 6.7% | 112.0% | 283.9 |
| Adj EBITDA Margin% ⁴ | 21.1% | 19.6% | 16.3% | 148 bps | 482 bps | 21.1% |
| EBITDA ⁵ | 84.1 | 82.4 | 42.0 | 2.0% | 100.3% | 264.8 |
| EBITDA Margin% ⁶ | 18.7% | 18.2% | 15.3% | 51 bps | 343 bps | 19.6% |
| PBT | 51.6 | 48.0 | 47.4 | 7.5% | 8.8% | 241.1 |
| PBT Margin% ⁷ | 11.5% | 10.6% | 17.2% | 88 bps | (577 bps) | 17.9% |
| PAT | 38.9 | 33.5 | 35.1 | 16.3% | 10.8% | 176.2 |
| PAT Margin% ⁸ | 8.7% | 7.4% | 12.8% | 127 bps | (413 bps) | 13.1% |
| Annual Recurring Revenue ⁹ | 1,797.4 | 1,811.0 | 1,098.8 | (0.8%) | 63.6% | 1,811.0 |
| Total Enterprise Clients (in Nos.) [#] | 979 | 953 | 855 | 2.7% | 14.5% | 953 |
| Revenue per Employee ^{10#} | 4.1 | 3.3 | 3.3 | 24.2% | 24.2% | 3.6 |
| Number of items processed (in Mn) [#] | 254.9 | 245.7 | 212.8 | 3.8% | 19.8% | 950.3 |
| Share of Revenue from Top 10 Clients (%) [#] | 15.2% | 19.7% | 21.3% | (450 bps) | (610 bps) | 19.0% |

Notes: [^]Unaudited & basis management of accounts (1) Revenue from contract with customers is total revenue generated by our Company from SaaS income and shipping service income, excluding other income sources. (2) Gross margin percentage represents the margin generated by the business after deducting the direct costs incurred to serve the clients, divided by revenue from contract with customers during the respective period / year. Direct costs include server hosting expense, software services and support cost attributable to business operation. (3) Adjusted EBITDA represents adjusted earnings before interest, taxes, depreciation and amortisation which has been arrived at by adding share-based payment expenses (part of employee benefits expenses) to EBITDA. EBITDA refers to earning before interest, taxes, depreciation and amortisation which has been arrived at by adding total tax expense, finance cost, depreciation and amortisation expense and reducing other income to the profit for the period / year. (4) Adjusted EBITDA Margin % represents Adjusted EBITDA as a % of revenue from contract with customers for the respective period / year. (5) EBITDA refers to earning before interest, taxes, depreciation and amortisation which has been arrived at by adding total tax expense, finance cost, depreciation and amortisation expense and reducing other income to the profit for the period / year. (6) EBITDA Margin % represents EBITDA as a % of revenue from contract with customers for the respective period / year. (7) Profit Before Tax Margin % represents Profit Before Tax as a % of revenue from contract with customers for the respective period / year. (8) Profit After Tax Margin % represents Profit After Tax as a % of revenue from contract with customers for the respective period / year. (9) Annual Recurring Revenue ("ARR") is defined as revenue from contract with customers in the most recent quarter of the respective periods multiplied by 4. (10) Revenue from contract with customers / employee represents revenue from contract with customers divided by the average number of employees for the respective periods. For quarter periods, the ratio has been calculated on the basis of annualised revenue from contract with customers for the given period / year; (#) KPIs relate to Uniware platform only

P&L – Q1 FY26

(Consolidated numbers In INR Million)

| Particulars | For the quarter ended June 30, 2025 (Audited) | For the quarter ended March 31, 2025 (Audited) | For the quarter ended June 30, 2024 (Audited) | For the year ended March 31, 2025 (Audited) |
|--|---|--|---|---|
| Income | | | | |
| Revenue from contract with customers | 449.34 | 452.74 | 274.69 | 1,347.90 |
| Other income | 8.29 | 10.64 | 15.51 | 54.05 |
| Total income (I) | 457.63 | 463.38 | 290.20 | 1,401.95 |
| Expenses | | | | |
| Employee benefits expense | 145.60 | 156.98 | 165.47 | 611.48 |
| Server hosting expense | 12.42 | 13.95 | 11.88 | 60.53 |
| Finance costs | 1.54 | 1.49 | 1.56 | 5.77 |
| Depreciation and amortisation expense | 39.25 | 43.58 | 8.54 | 71.97 |
| Other expenses | 207.25 | 199.41 | 55.37 | 411.11 |
| Total expense (II) | 406.06 | 415.41 | 242.82 | 1,160.86 |
| Profit before tax (III = I-II) | 51.57 | 47.97 | 47.38 | 241.09 |
| Current tax | 18.21 | 23.82 | 14.84 | 65.58 |
| Adjustment of tax relating to earlier periods | – | – | – | 11.38 |
| Deferred tax | (5.54) | (9.30) | (2.58) | (12.08) |
| Income tax expense (IV) | 12.67 | 14.52 | 12.26 | 64.88 |
| Profit for the quarter/year (V= III-IV) | 38.90 | 33.45 | 35.12 | 176.21 |

The increase is primarily due to non-cash amortisation expenses of INR 33.2 Mn in Q1 FY26 and INR 35.3 Mn in Q4 FY25 related to intangible assets from the Shipway Technology Pvt. Ltd. acquisition as per applicable accounting standards.

These accounting charges do not affect our operating profitability.

PAT, excluding non-cash amortisation expenses related to Shipway acquisition, in Q1 FY26 is INR 63.7 million, up 81.5% YoY



For further information, please contact

| Company: | Investor Relations Advisors: |
|---|---|
|  <p>CIN: L74140DL2012PLC230932 Investor Relations investor.relations@unicommerce.com</p> <p>www.unicommerce.com</p> |  <p>CIN: U74140MH2010PTC204285 Mr. Rahul Agarwal / Mr. Karan Thakker rahul.agarwal@sgapl.net / karan.thakker@sgapl.net +91 98214 38864 / +91 81699 62562</p> <p>www.sgapl.net</p> |