

May 14, 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, kindly find enclosed Investors' Presentation on the financial performance of the Company for the quarter and financial year ended March 31, 2025.

Request to please 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
Q4 and FY25**



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FY25 Key Highlights

Revenue

₹ 546.3 Cr

↑ 16.4% YoY
(23.2% Ex LLC divestment)

Reported EBITDA

₹ 129.6 Cr

↑ 12.1% YoY

PAT

₹ 83.3 Cr

↑ 30.2% YoY

Platforms : SmartPay 4 migration completed for a 1/4th of our customers; balance on track for completion by July'25 – Payroll TAT & Accuracy for migrated customers higher than company averages

Net Promoter Score (NPS): Significant improvement in NPS from 11 to 55 – C M from 58 to 81 & E M from 0 to 51 - endorsement of customer management / governance framework & creating WoW experience through superior service delivery.

EXM - Payroll accuracy 99.8%, on time delivery 99.1% & Query TAT 96.4% .

CXM - Green service delivery across.

Gender diversity up from 43.5% to 46.6%

Contents



Company Overview



Key Business Highlights



Financial Performance



Business segments update



Annexures

Company Overview

Global Leader in Outsourcing Solutions

Corporate



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



25 years of Global BPO service Excellence



420 Client engagements globally including Fortune 100 companies

Employee Experience Management (EXM)



~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

Customer Experience Management (CXM)



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

EXM - Market Leader in HRO Services | CXM - Value-adding Global BPM Player

Global Delivery Capabilities

- ❖ Servicing **46 Countries**
- ❖ Holding company India, Subsidiaries - US & Manila.
- ❖ FTEs – Allsec ~ 6,300 - India (~4,500) Manila (~1,800)
- ❖ Manila grown by ~300 seats in Q4'25.
- ❖ Manila - Multi-lingual hub offering **12+ International languages** using native speakers



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

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



Manila, Philippines – ~1800 Seats

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



New Jersey, USA

Leading and growing provider of E2E EXM services



HR Services

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



Leave & Attendance

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



Payroll

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



Reimbursement System

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



HRMS & Eco-system

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



Retirals

- PF Trust Accounting
- Loans
- Investments

Smart HR

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



SmartHR for SME/ SaaS

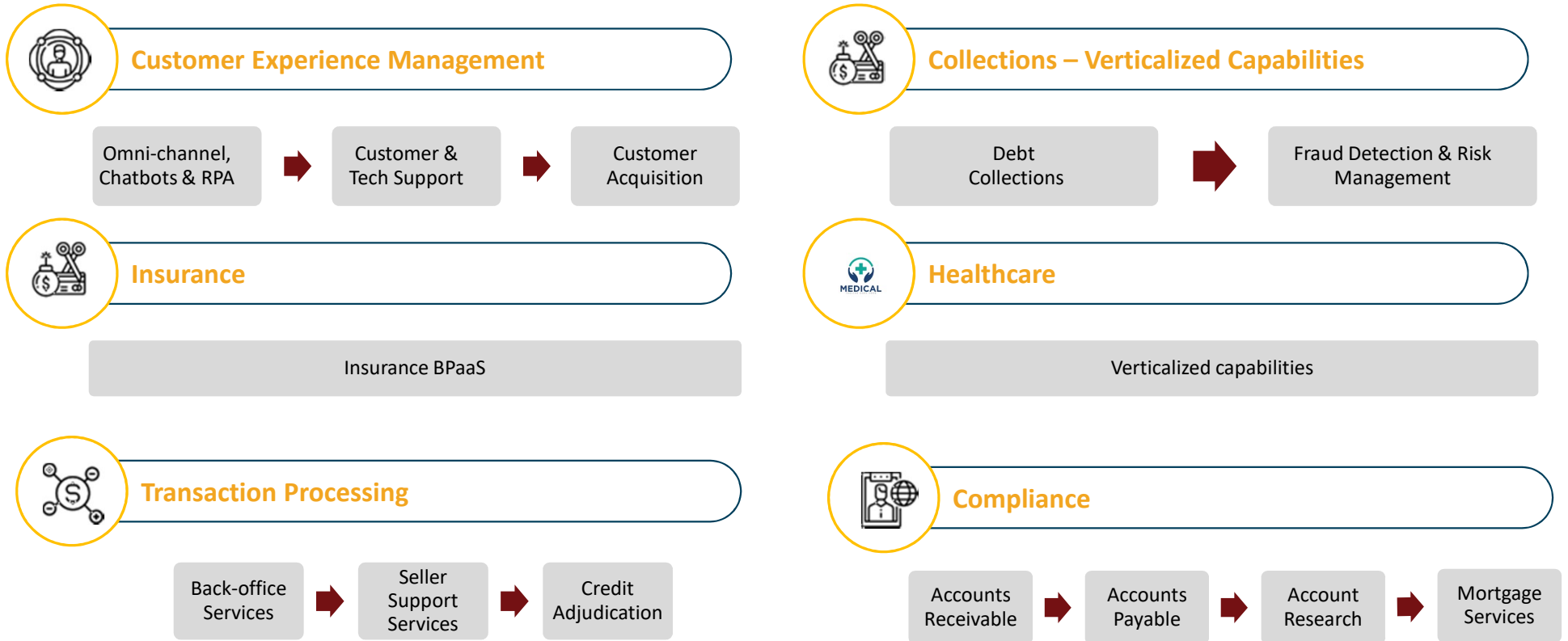
Smart Pay

Manage & deliver powerful & accurate payroll every time

Smart Stat

Tackle complex payroll compliances backed by technology

CXM: Cutting edge Digital Business Services offerings





Key Business Highlights

Financial Highlights – Q4FY25

Financial

Q4 FY25 P&L highlights:

(in ₹ Crs.)

			YOY%		QoQ%
Revenue	146.1	▲	12.6%	▲	4.7%
EBITDA	35.2	▲	Flat	▲	8.6%

Balance Sheet:

Cash & Liquid Funds	165.1	▲	26.8 Cr	▲	33.2 Cr
OCF	48.2	▲	87.5%	▲	100%

- Revenue growth (ex. LLC divestment) at 19% YoY
- EBITDA margins lower YoY due to funding of Client specific & overall sales investment which will improve over the coming quarters.
- Improvement in Collections led by focused efforts

			YOY%		QoQ%
EBITDA Margin	24.1%	▼	300bps	▲	90bps
PAT (Crs)	19.3	▼	6.8%	▼	3.0%

Collection (Crs)	153.3	▲	16.8%	▲	4.5%
DSO (Billed & Unbilled)	75days		Flat	▼	1 day

- PAT lower QoQ & YoY primarily due to depreciation linked to new Manila facility.
- Cash & liquid funds up on account of receipt of Income tax refund.
- OCF higher on account of improved collections

Financial Highlights – FY25

Financial

FY25 P&L highlights:

(in ₹ Crs.)	FY25	FY24	YoY%
Revenue	546.3	469.4	▲ 16.4%*
EBITDA	129.6	115.6	▲ 12.1%

Balance Sheet:

Cash & Liquid Funds	165.1	138.3	▲ 26.8 Cr
OCF	121.3	91.0	▲ 33.3%

*Revenue growth (ex. LLC divestment) at 23% YoY

- EBITDA margins lower YoY due to funding of Client specific & overall sales investment which will improve over the coming quarters.
- Improvement in Collections led by focused efforts

	FY25	FY24	YoY%
EBITDA Margin	23.7%	24.6%	▼ 90bps
PAT (Crs)	83.3	64.0	▲ 30.2%
Collection (Crs)	574.2	478.0	▲ 96.2 Cr
DSO (Billed & Unbilled)	81 days	78 days	▼ 3 days

- **OCF** : Business growth & improved collection.
- Cash & liquid funds up on account of receipt of Income tax refund.
- **PAT** improvement linked to business growth.

Business Highlights

Employee Experience Management (EXM)



- Payroll revenue up by YoY 10.3% from both existing & new clients
- Net employee records added : ~ 172.4 lacs, up by 11.3% YoY
- First time wins in PSU / Govt Sector, both in India and Philippines.
- Highest number of new logos in Alldigi history at 63 (up 34%) with ACV 30 Cr; avg ticket size up 12%.
- International focus – FY 25 ACV of 14.4 Cr (up 47%)

Customer Experience Management (CXM)



- Revenue growth up by 28.4% YoY
- Healthcare continues to contribute significantly to this growth
- CXM International business up by 32.5% YoY
- ACV ~ ₹ 31.7 Cr added from account mining & Hunting.

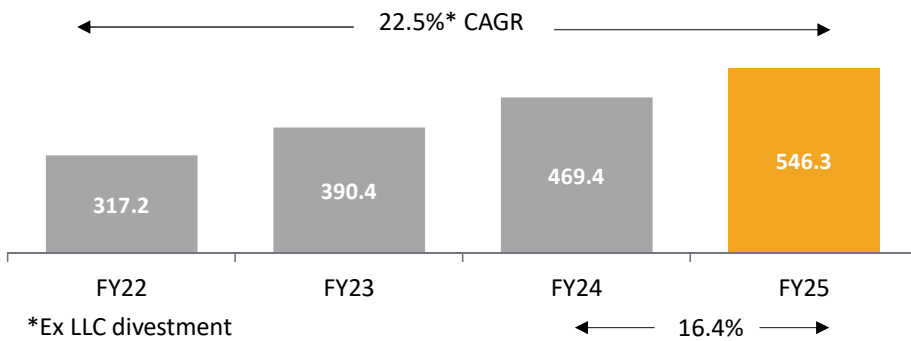
Financial Performance

Financial Highlights (1/2)

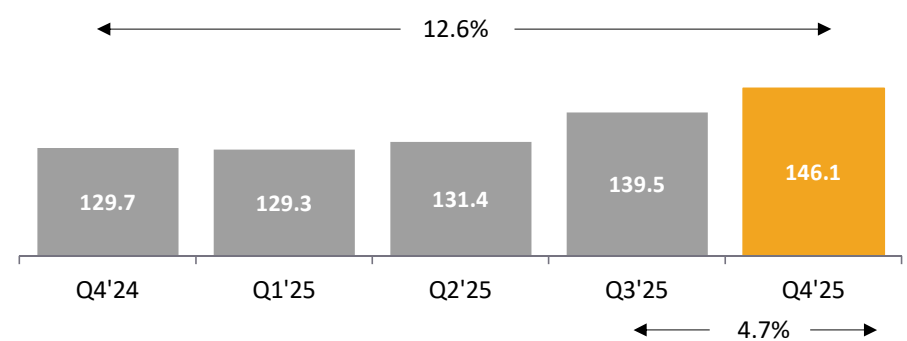
Revenue

(Rs. Crore)

Yearly trends

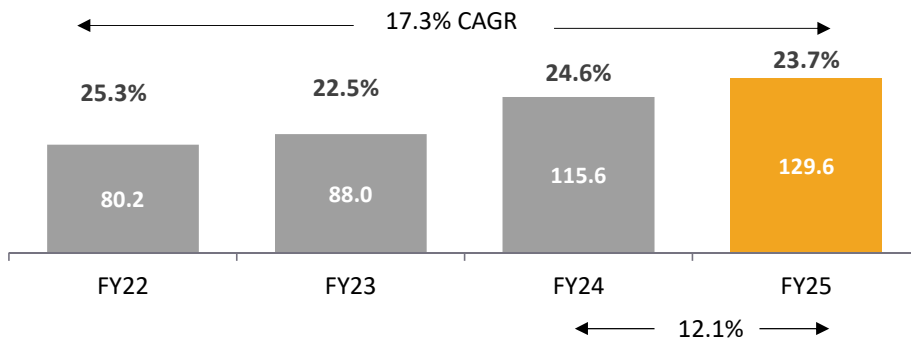


Quarterly trends

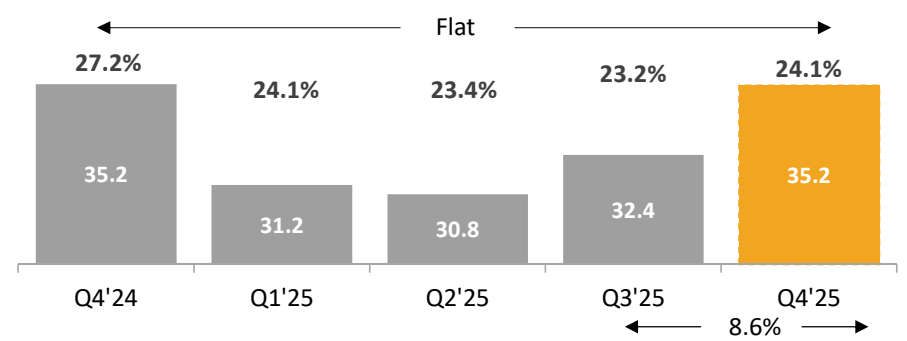


EBITDA and EBITDA%

Yearly trends



Quarterly trends

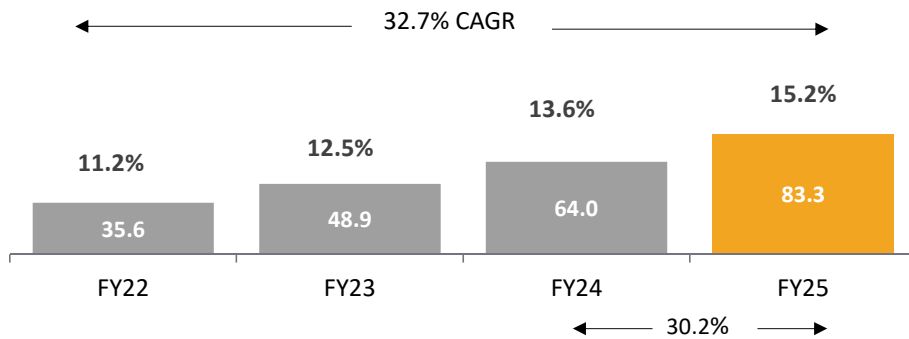


Financial Highlights (2/2)

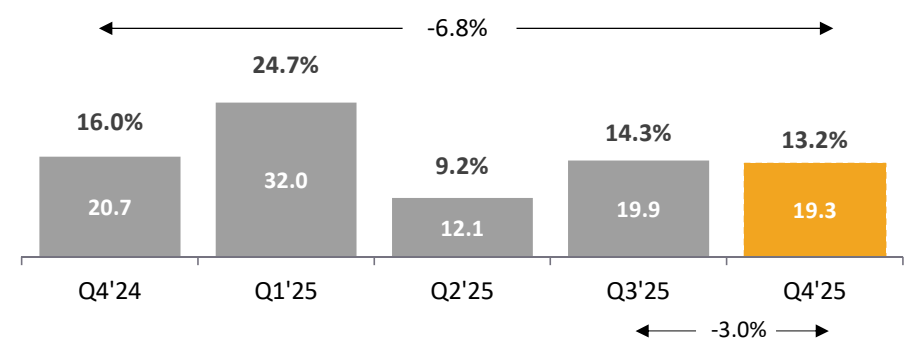
PAT and PAT%

(Rs. Crore)

Yearly trends

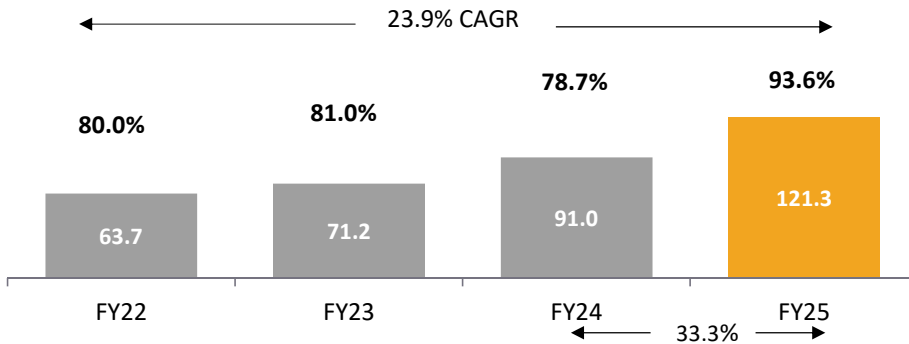


Quarterly trends

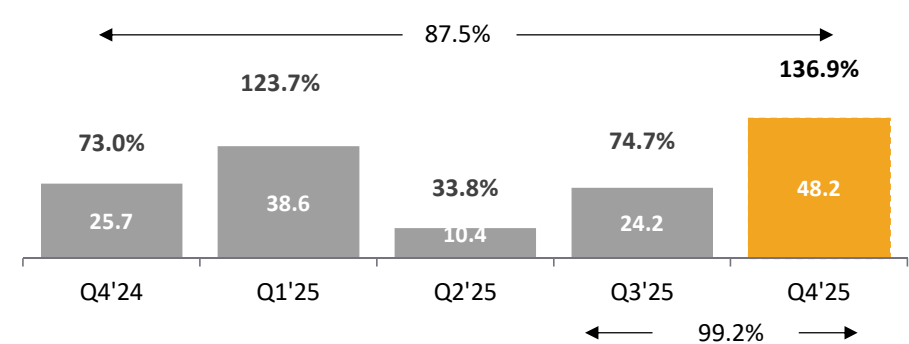


OCF and OCF Conversion%

Yearly trends



Quarterly trends





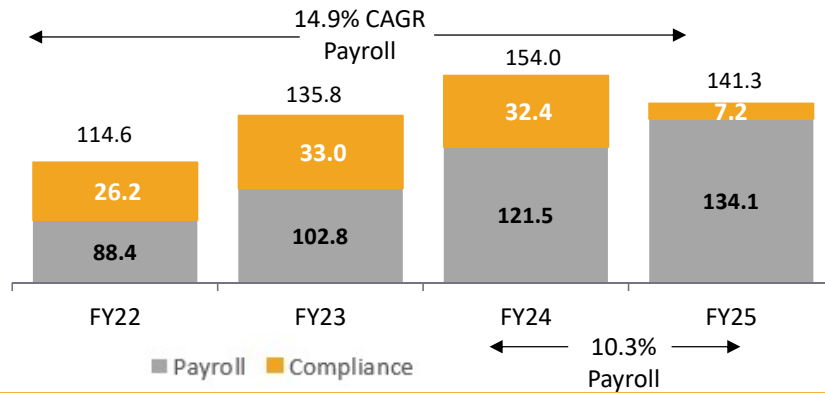
Business Segment Updates

Employee Experience Management – Performance

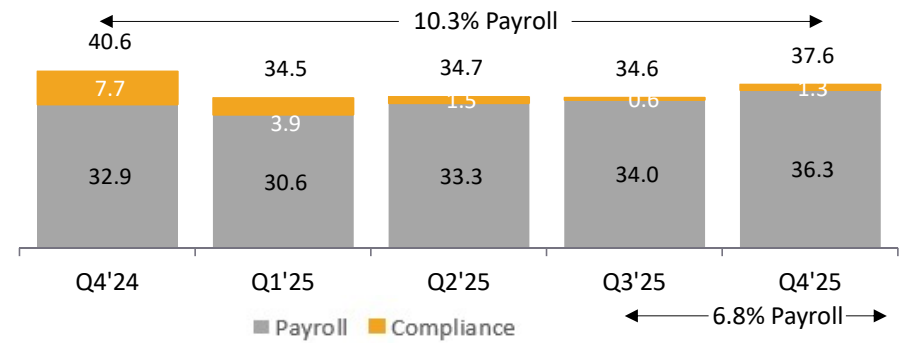
Segment Revenue

(Rs. Crore)

Yearly trends

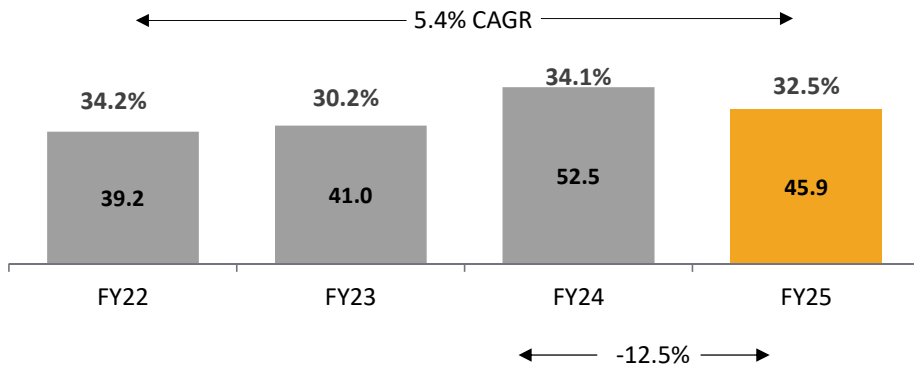


Quarterly trends

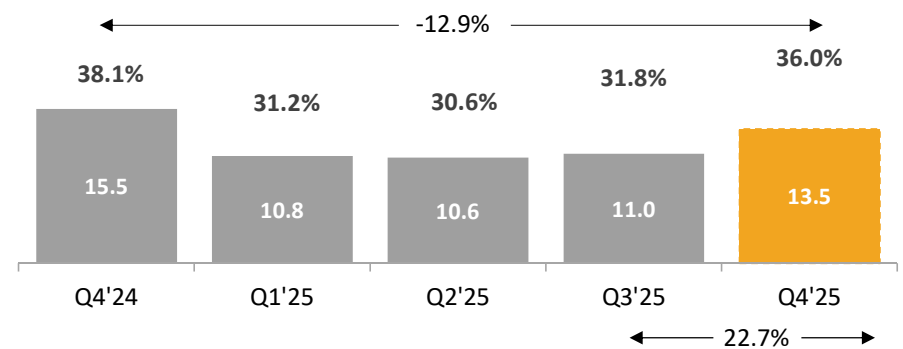


Segment Margin and Margin%

Yearly trends



Quarterly trends

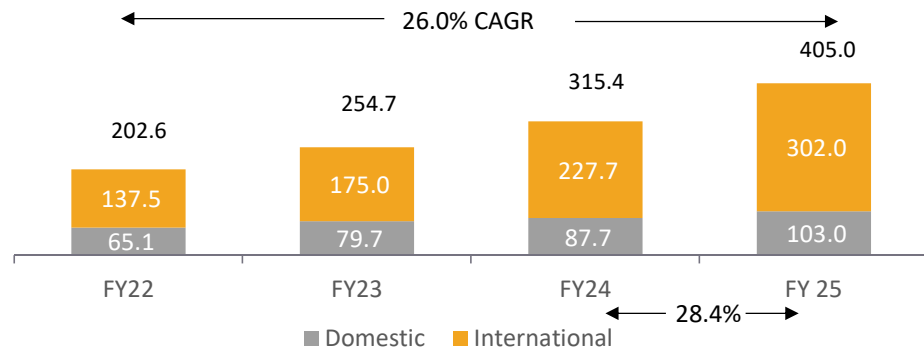


Customer Experience Management (CXM) – Performance

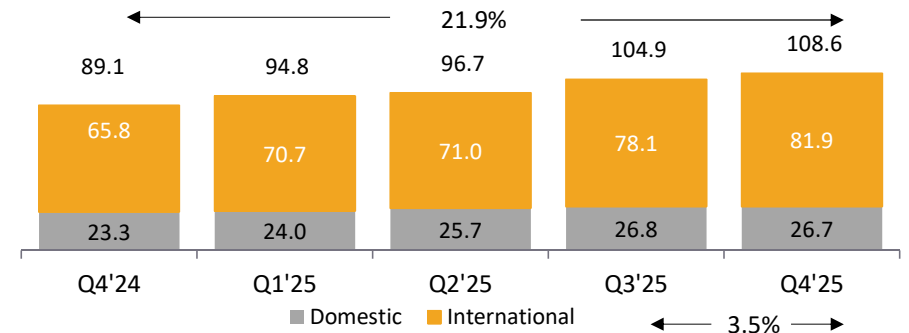
Segment Revenue

(Rs. Crore)

Yearly trends

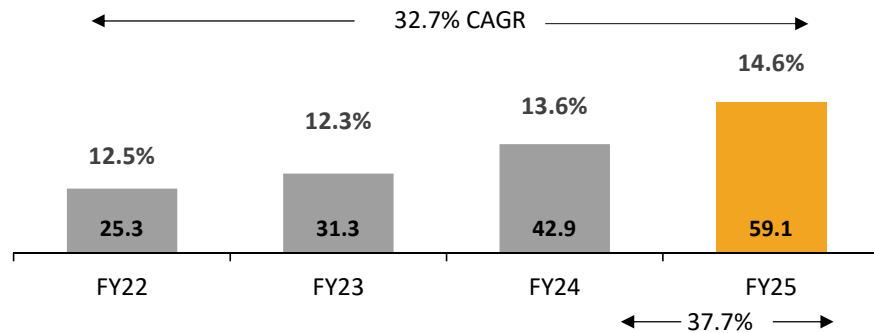


Quarterly trends

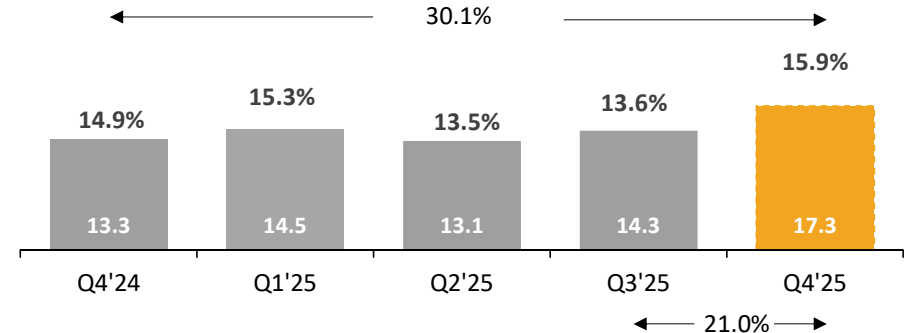


Segment Margin and %

Yearly trends

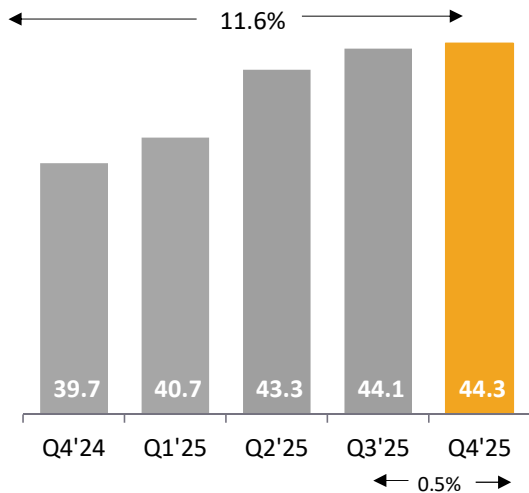


Quarterly trends

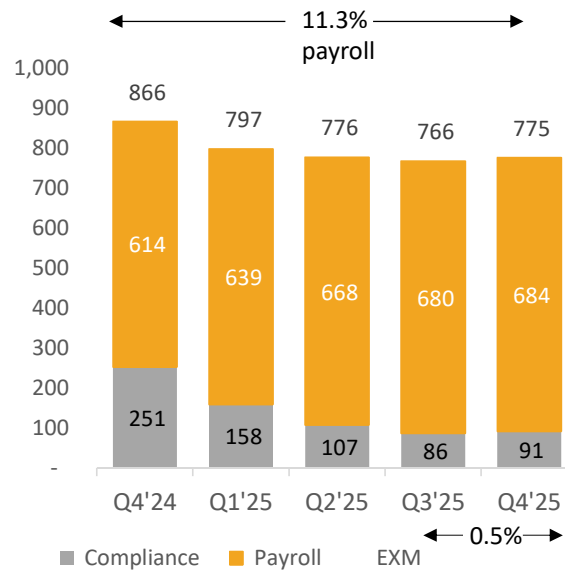


FTEs & Employee Records Processed

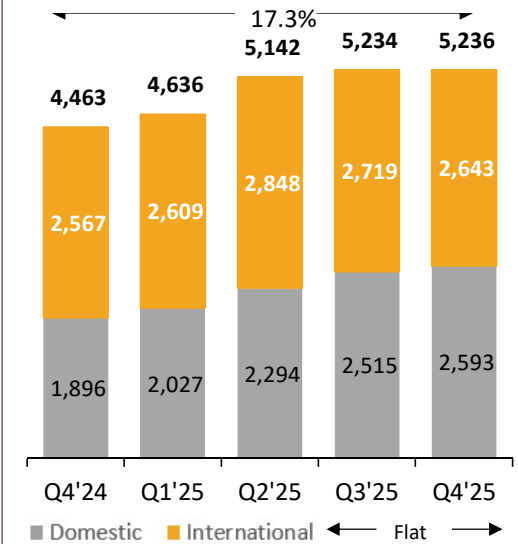
Employee records (Lacs)



EXM FTE (Avg)



CXM FTE (Avg)



- EXM employee records processed up by 11.6% YoY
- EXM FTE Payroll up by 11.3% YoY
- CXM FTE up by 17.3% YoY with International up by 36.7%.

Annexures

Income Statement

Particulars (in Rs. Cr)	Q4 FY25	Q3 FY25	QoQ	Q4 FY24	YoY	FY25	FY24	YoY
Revenue from Operations	146.1	139.5	4.7%	129.7	12.6%	546.3	469.4	16.4%
Employee Benefit Expenses	(82.5)	(79.3)	4.1%	(71.8)	14.9%	(312.7)	(264.2)	18.3%
Other Expenses	(28.4)	(27.8)	2.5%	(22.7)	25.4%	(104.0)	(89.6)	16.1%
Total Expenses	(110.9)	(107.0)	3.7%	(94.5)	17.4%	(416.7)	(353.8)	17.8%
EBITDA	35.2	32.4	8.6%	35.2	0.0%	129.6	115.6	12.1%
EBITDA Margin	24.1%	23.3%	90bps	27.1%	-300 bps	23.7%	24.6%	-90 bps
Other Income	4.6	3.6	28.8%	1.7	179.4%	10.8	6.9	56.2%
Finance Cost	(1.5)	(1.0)	54.6%	(1.3)	18.1%	(4.6)	(3.8)	20.8%
Depreciation and Amortisation	(12.2)	(10.6)	15.0%	(9.8)	24.7%	(42.7)	(33.6)	27.1%
PBT & Exceptional Item	26.1	24.5	6.7%	25.9	0.9%	93.1	85.1	9.4%
Exceptional Item	(0.8)	0.0	0.0%	0.0	0.0%	16.9	0.0	0.0%
Profit Before Tax	25.3	24.5	3.4%	25.9	-2.2%	110.0	85.1	29.3%
PBT Margin	17.3%	17.5%	-20 bps	19.9%	-260 bps	20.1%	18.1%	200 bps
Normal Tax	(6.0)	(4.6)	32.1%	(5.1)	17.2%	(26.7)	(21.1)	26.6%
Profit After Tax	19.3	19.9	-3.0%	20.7	-6.8%	83.3	64.0	30.2%
PAT Margin	13.2%	14.3%	-110 bps	16.0%	-270 bps	15.2%	13.6%	160 bps
Basic and Diluted EPS (in Rs.)	12.7	13.1	-3.2%	13.6	-6.9%	54.7	42.0	30.1%

NOTE : The reclassification of gratuity made in current year pertaining to FY24 has not been reflected in this presentation.

Balance Sheet

Particulars (in Rs. Cr)	31-Mar-22	31-Mar-23	31-Mar-24	31-Mar-25
Assets				
Non-Current Assets				
Property, Plant and Equipment (inc CWIP)	9.3	12.2	21.7	27.6
Right of Use Assets	42.7	42.4	41.5	61.1
Other Intangible Assets (inc IAUD)	11.8	17.2	15.1	17.2
Other Non-Current Assets	24.1	27.2	38.4	21.5
	87.9	98.9	116.6	127.3
Current Assets				
Current Investments	46.9	46.8	56.3	82.7
Cash and Cash Equivalents	81.7	90.4	82.0	82.4
Trade Receivables	57.2	59.2	65.7	71.9
Unbilled Revenues	14.8	28.9	29.7	47.6
Other Current Assets	5.6	9.4	17.3	7.3
	206.3	234.7	251.0	291.9
Total Assets	294.2	333.6	367.6	419.3
Liabilities				
Equity and Reserves	209.4	229.7	245.5	259.5
Non-Current Liabilities				
Lease Liability	27.1	25.1	26.4	43.3
Other Non-Current Liability	7.3	7.7	9.3	8.0
	34.4	32.8	35.7	51.3
Current Liabilities				
Lease Liabilities	15.9	18.9	18.2	19.9
Trade Payables and Other Current Liabilities	34.5	52.2	68.2	88.6
	50.4	71	86.4	108.5
Total Equity and Liabilities	294.2	333.6	367.6	419.3

Cashflow Statement

Particulars (in Rs. Cr)	31-Mar-22	31-Mar-23	31-Mar-24	31-Mar-25
PBT	61.1	64.5	85.1	110.0
Add: Non Cash Expenses / Income	21.0	24.5	34.7	21.6
Operating Profit before Working Capital Changes	82.1	89.0	119.8	131.6
Changes in Working Capital and Tax Paid	(18.4)	(17.7)	(29.0)	(13.1)
Net Cash Generated from Operating Activities	63.7	71.2	90.8	118.5
Capex	(20.7)	(17.4)	(23.4)	(17.4)
Sale /(Purchase) of current investments (net)			(6.1)	(5.0)
Cash Flow from Investing Activities	(20.7)	(17.4)	(29.5)	(22.4)
Interest Paid	(2.2)	(3.7)	(3.8)	(3.8)
Payment of Lease Liabilities	(18.8)	(17.4)	(21.4)	(24.2)
Dividend Pay-out	(91.3)	(30.5)	(45.7)	(68.5)
Cash Flow from Financing Activities	(112.3)	(51.6)	(70.9)	(96.5)
Net Cash in Cash and Cash Equivalents	(69.3)	2.3	(9.6)	(0.4)
Opening Cash and Cash Equivalents	148.6	81.4	90.1	81.7
Exchange Rate Fluctuations	2.1	6.4	1.2	0.1
Closing Cash and Equivalents	81.4	90.1	81.7	81.4



alldigi tech

formerly allsec technologies

A digitide company

Thank You!