

October 30, 2025

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

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 for the second quarter and half year ended September 30, 2025.

This is for your information and records.

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

Digitally signed
by SHIVANI
SHARMA
Date: 2025.10.30
21:23:06 +05'30'

Shivani Sharma
Company Secretary & Compliance Officer
ACS-39590

Encl:- a/a

alldigi tech

A digitide company

Earnings Update Q2 FY26
30th October 2025



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Q2 FY26 Key Highlights

Revenue

	₹ Cr	YoY	QoQ
Q2	147.4	↑12.2%	↑2.4%
H1	291.3	↑11.7%	

Reported EBITDA

	₹ Cr	YoY	QoQ
Q2	36.0	↑16.9%	↓1.4%
H1	72.6	↑17.1%	

PAT

	₹ Cr	YoY	QoQ
Q2	17.6	↑45.5%	↑18.1%
H1	32.5	↓26.3%*	

*Impact of LLC divestment in Q1'25

Alldigi recognized by Everest Group's PEAK Matrix® Assessment 2025

- "Star Performer in the Major Contender category" for Multi-Country Payroll (MCP) Solutions - our growth, deal momentum & innovation over the past year was among the highest in MCP group.
- "Major Contender" for CXM – APAC & US

Revenue Mix

- International Revenue up 13.8% YoY, mix at 63.1% in Q2'26 as against 62.1% in Q2'25

Platforms

- SP4 migration - completed for India based customers.
- HRMS V2 upgrade (Payroll + ESS) - 5 new & 2 existing clients onboarded on new platform of these 3 client have gone live
- AI in Payroll operations (PulseHR.ai) roadmap agreed and will be implemented over the next 3 quarters.

Employee records

- 16.2 lacs for Sep'25 ; 47.6 lacs for Q2'26 (YoY ↑10% & QoQ ↑5%)

Service Delivery

- T&D - Employee records per FTE up 5.4% YoY & 3.0% QoQ
- BPM – Largely green service delivery across

Human Resources

- Gender diversity up 2.1% YoY
- Attrition down by 1.1% YoY & 0.7% QoQ

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



600 Client engagements globally including Fortune 100 companies

Tech & Digital



~18 million employee records processed per annum- clear market leadership



5,40,000+ 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

Tech & digital - Market Leader in HRO Services | BPM - Value-adding Global BPM Player

Global Delivery Capabilities



- Servicing 69 Countries
- Holding company India, Subsidiaries - US & Manila.
- Seats – Alldigi ~ 6400 - India (~4,600) Manila (~1,800)
- Manila - Multi-lingual hub offering 12+ International languages using native speakers



Chennai (HQ), Bangalore, Noida, India – ~4,600 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 T&D 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

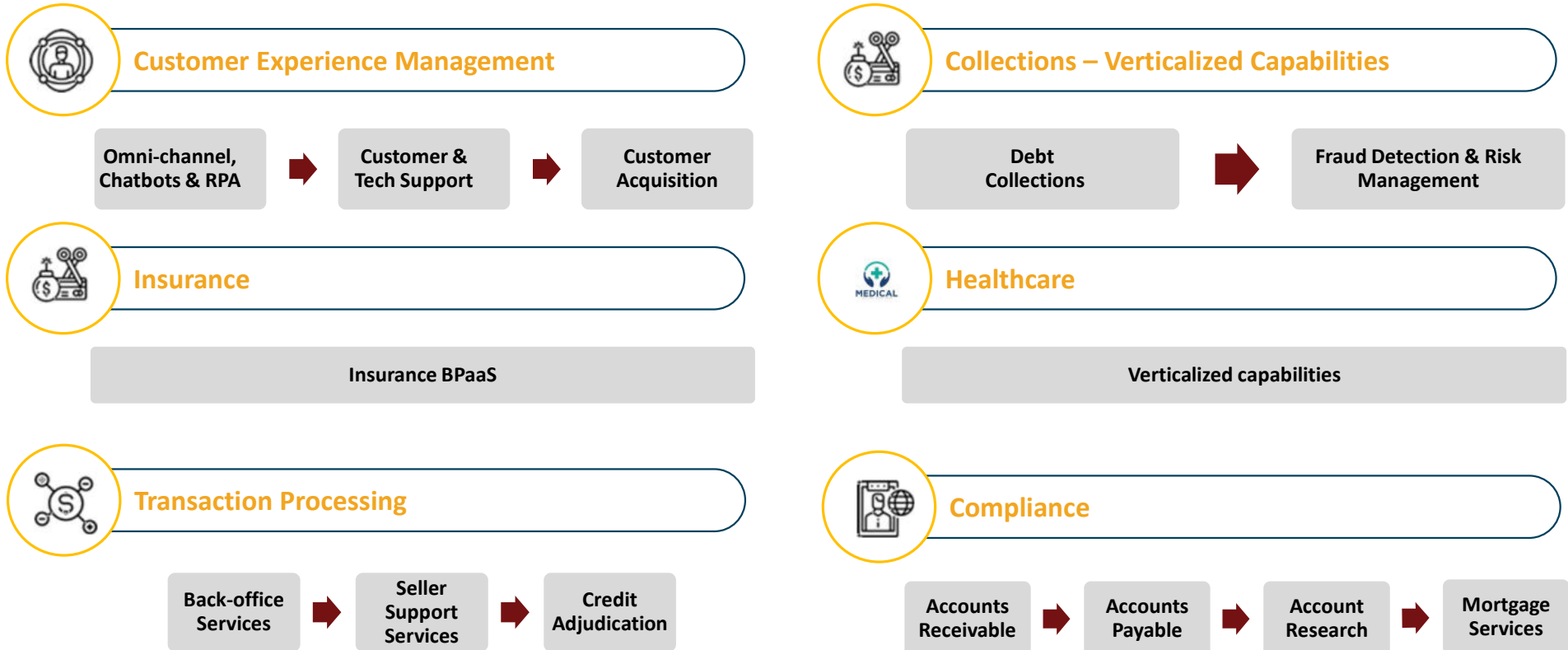
Smart Pay

Manage & deliver powerful & accurate payroll every time

Smart Stat

Tackle complex payroll compliances backed by technology

BPM: Cutting edge Digital Business Services offerings





Key Business Highlights

Financial Highlights – Q2FY26

Financial

Q2 FY26 P&L highlights:

(in ₹ Crs.)

		YOY%	QoQ%
Revenue	147.4	▲ 12.2%	▲ 2.4%
EBITDA	36.0	▲ 16.9%	▼ 1.4%

Balance Sheet:

Cash & Liquid Funds	136.7	▼ 24.9 Cr	▼ 21.7 Cr
OCF	33.4	▲ 41.7%	▲ 66.2%

- **Revenue** : ₹ 3.5 Cr (2.4%) increase QoQ and ₹ 16.0 Cr (12.2%) YoY.
- **Cash & Liquid funds** lower on account of dividend payment of ₹ 45.7 Cr in Q2.
- **EBITDA & EBITDA Margin**: Lower on account of Investment in Sales and leadership

		YOY%	QoQ%
EBITDA Margin	24.4%	▲ 100bps	▼ 96bps
PAT (Crs)	17.6	▲ 45.5%	▲ 18.1%

Collection (Crs)	174.4	▲ 34.6%	▲ 24.0%
DSO (Billed & Unbilled)	77days	▲ 1 day	▲ 10 days

- **DSO days improved** by 10 days QoQ as there was marginal delay in collections from few customers in BPM business in Q1 enabling higher collections in Q2.
- PAT higher YoY on account of dividend withholding tax impact in Q2 FY'25
- PAT higher QoQ due to forex translation gain and withholding tax impact in Q1FY'26

Financial Highlights – H1FY26

Financial

H1 FY26 P&L highlights:

(in ₹ Crs.)

		YOY%
Revenue	291.3	▲ 11.7%
EBITDA	72.6	▲ 17.1%

Balance Sheet:

Cash & Liquid Funds	136.7	▼ 24.9
OCF	53.5	▲ 9.2%

- **Revenue** : ₹ 30.6 Cr (11.7%) growth across both Verticals
- **Cash & Liquid funds** lower on account of dividend payment of ₹ 45.7 Cr in Q2.

YOY%

EBITDA Margin	24.9%	▲ 114bps
PAT (Crs)	32.5	▼ 26.3%

Collection (Crs)	304.0	▲ 10.9%
DSO (Billed & Unbilled)	77days	▲ 1 day

- **PAT** lower YoY on account of LLC divestment impact in H1'25

Q2 / H1 FY'26 Business Highlights



Tech & Digital

- Q2 revenue up 15.3% YoY; H1 up 16.9% YoY.
- Net employee records added : ~ 4.30 lacs, up by 10% H1 YoY & 5% Q2 YoY
- Q2 ACV ~ ₹ 8.7 Cr - 15 New logos (vs 2 in Q2'25)
- H1 ACV ~ 18.0 Cr – 2X of H1'25



BPM

- Q2 revenue up 11.1% YoY; H1 up 10.0% YoY
- Healthcare continues to contribute significantly to this growth – account mining of existing customer
- One new logo added
- Q2 International revenue up 16.1% YoY; H1 up 16.9% YoY
- Q2 ACV ~ ₹ 11.2 Cr / H1 ACV ~ ₹ 22.0 Cr
- Significant increase in Sales funnel over June'25.



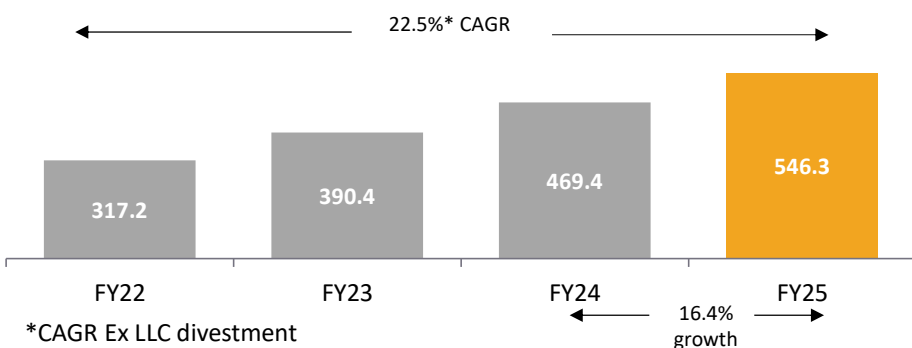
Financial Performance

Q2 FY26 Financial Highlights (1/2)

Revenue

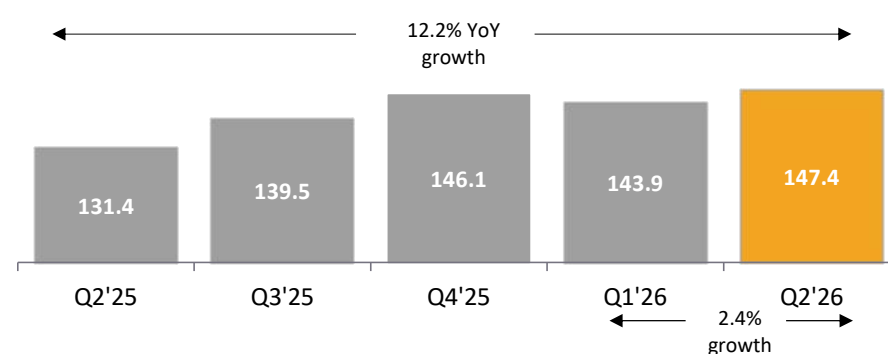
(Figures represent Rs crore)

Yearly trends



(Figures represent Rs crore)

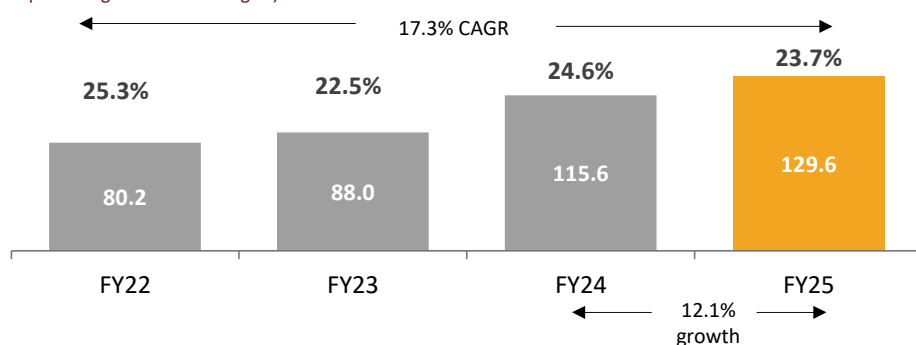
Quarterly trends



EBITDA and EBITDA%

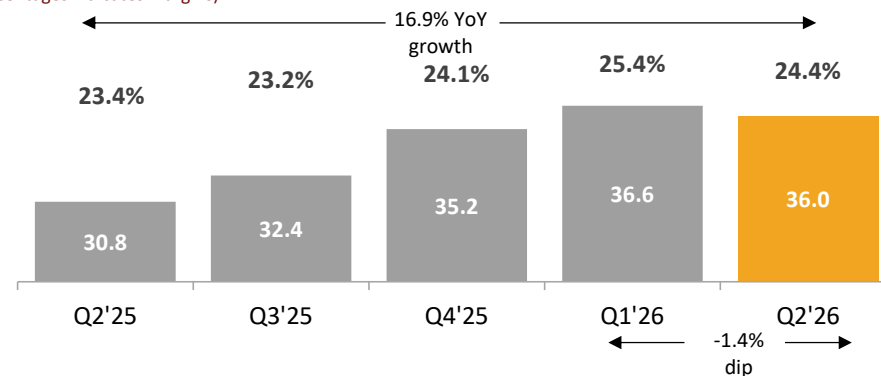
(Figures represent Rs crore; percentages indicates margins)

Yearly trends



(Figures represent Rs crore; percentages indicates margins)

Quarterly trends

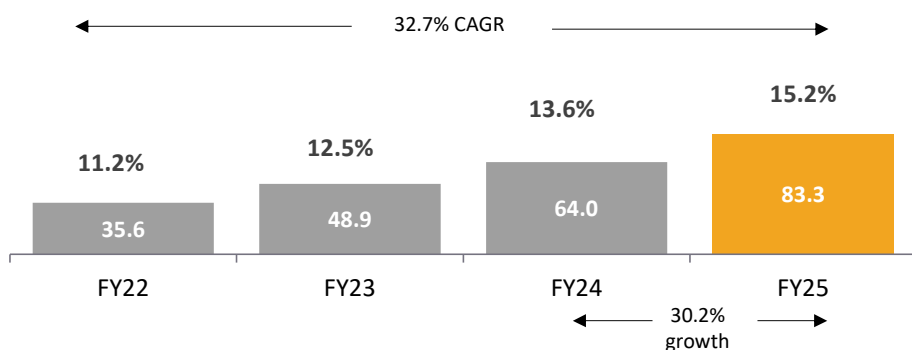


Q2 FY26 Financial Highlights (2/2)

PAT and PAT%

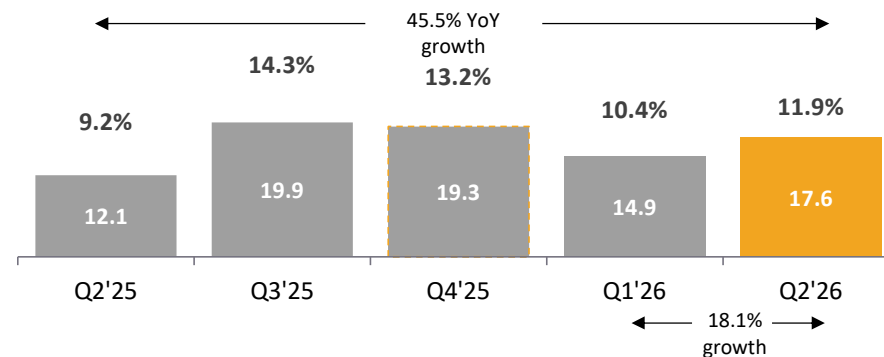
(Figures represent Rs crore;
percentages indicates margins)

Yearly trends



(Figures represent Rs crore;
percentages indicates margins)

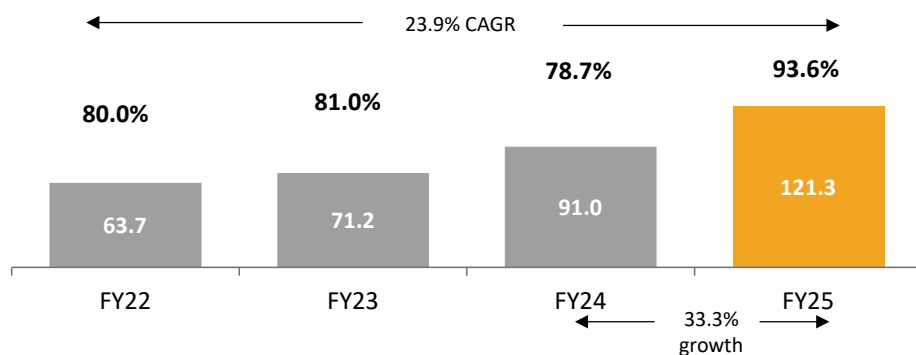
Quarterly trends



OCF and OCF Conversion%

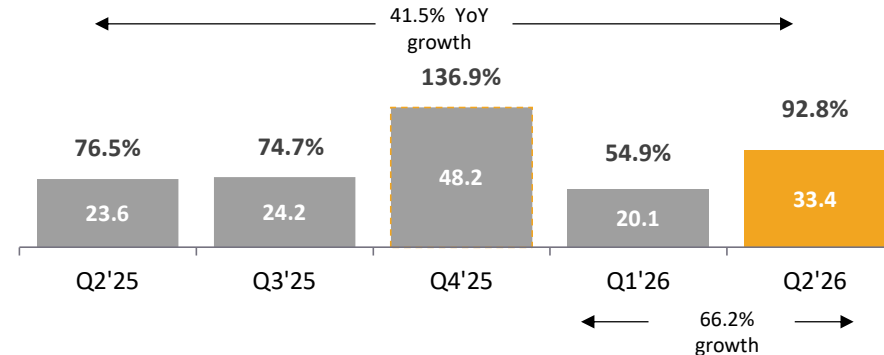
(Figures represent Rs crore;
percentages indicates OCF conversion)

Yearly trends



(Figures represent Rs crore;
percentages indicates OCF conversion)

Quarterly trends





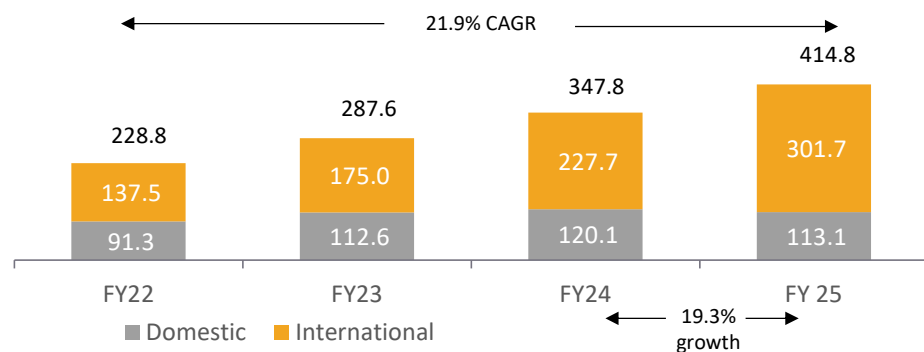
Business Segment Updates

BPM – Q2 FY 26 Performance

Segment Revenue

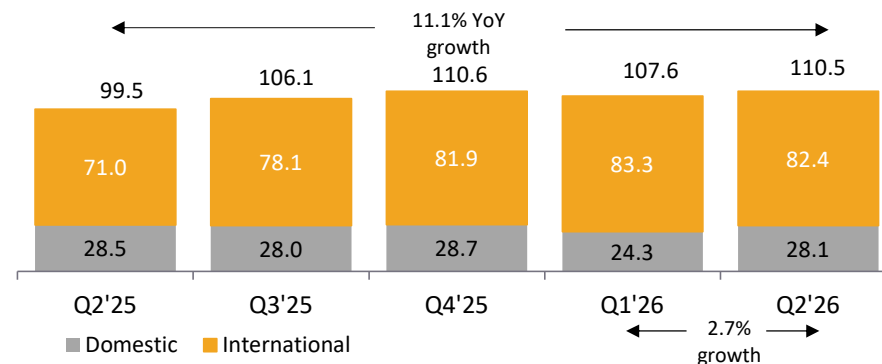
(Figures represent Rs crore)

Yearly trends



(Figures represent Rs crore)

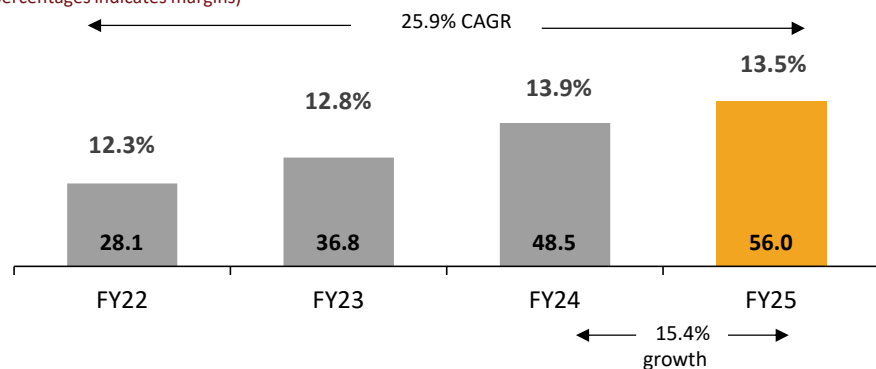
Quarterly trends



Segment Margin and Margin %

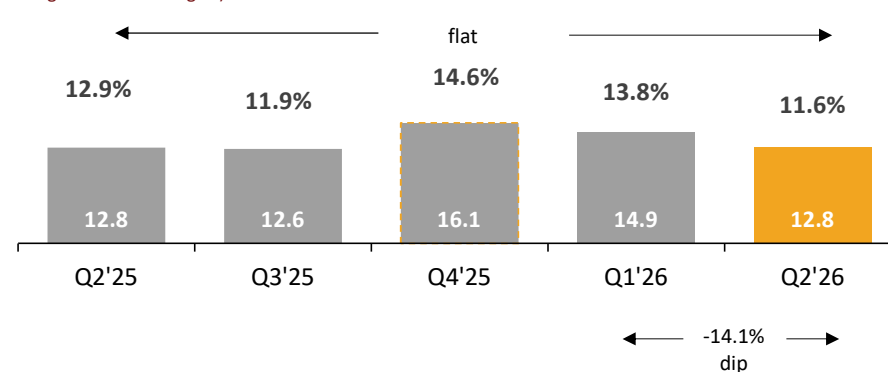
(Figures represent Rs crore; percentages indicates margins)

Yearly trends



(Figures represent Rs crore; percentages indicates margins)

Quarterly trends

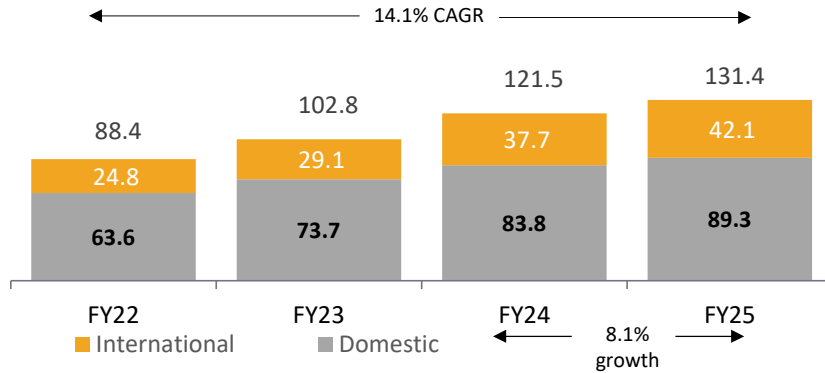


Tech & Digital – Q2 FY 26 Performance

Segment Revenue

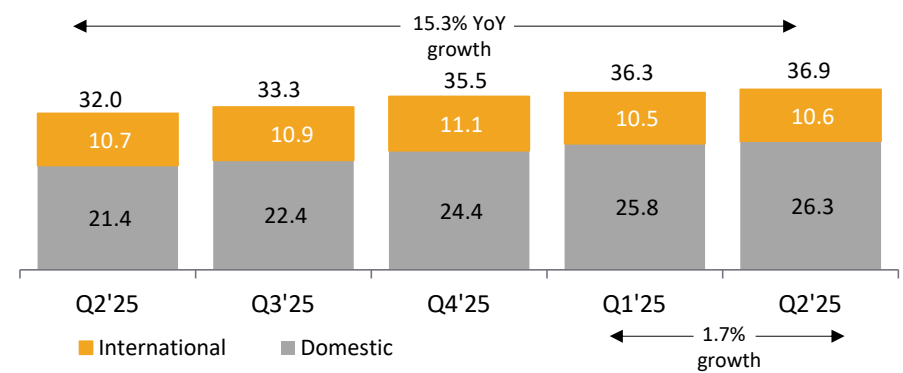
(Figures represent Rs crore)

Yearly trends



(Figures represent Rs crore)

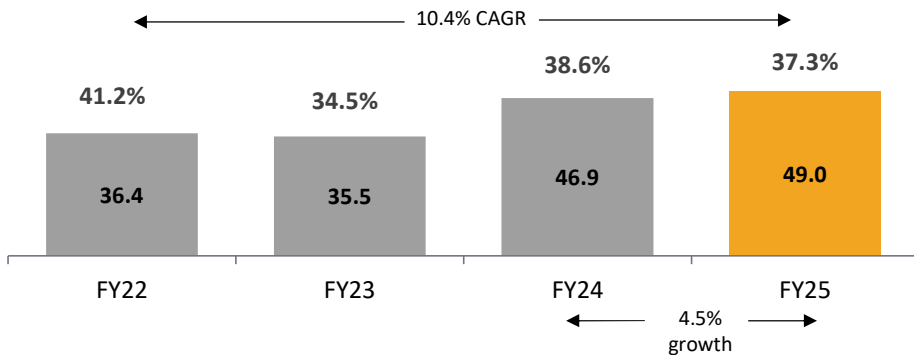
Quarterly trends



Segment Margin and Margin %

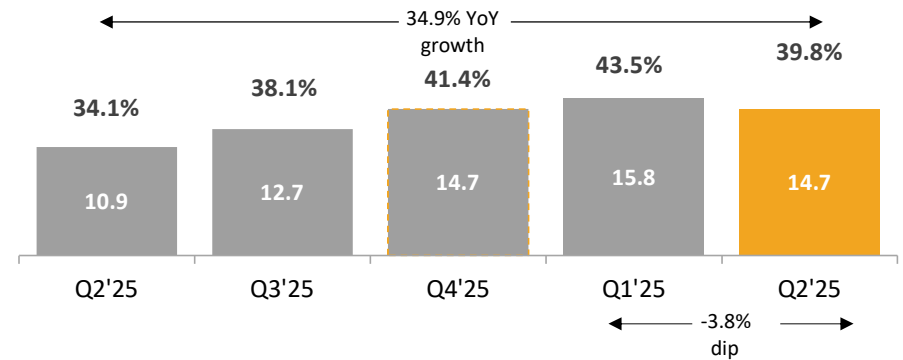
(Figures represent Rs crore; percentages indicates margins)

Yearly trends

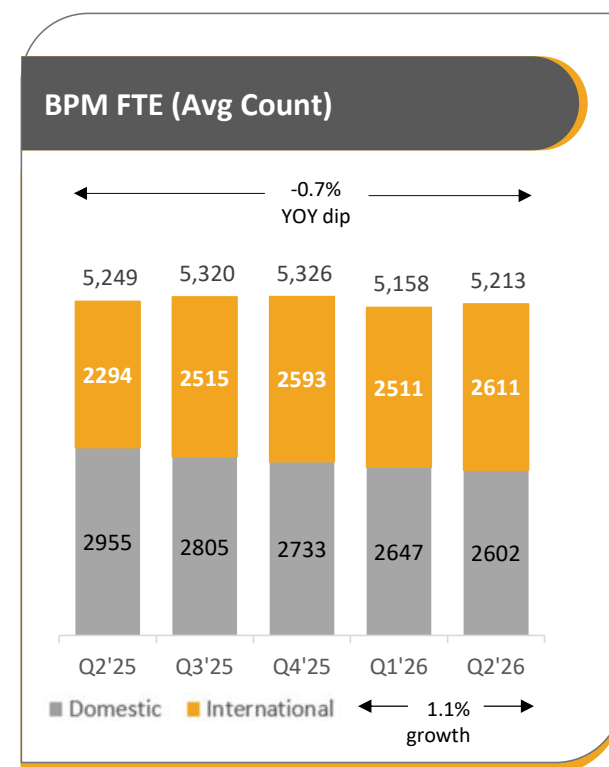
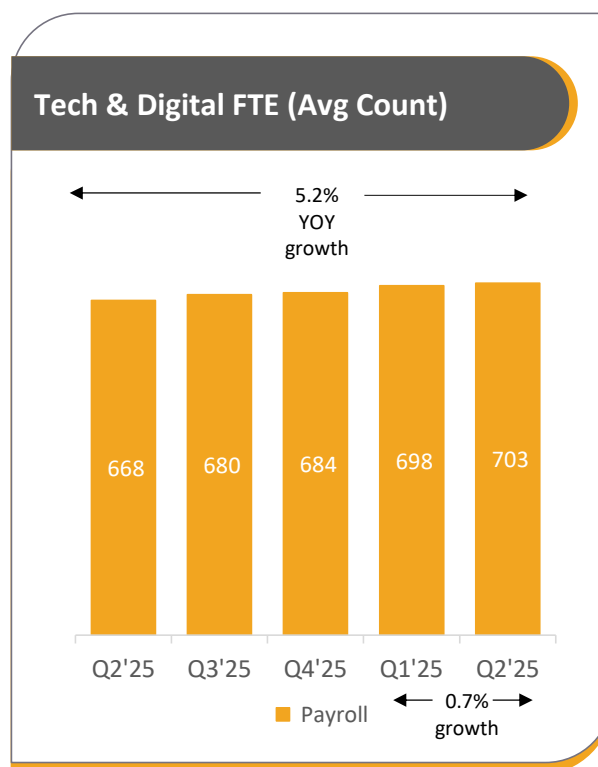
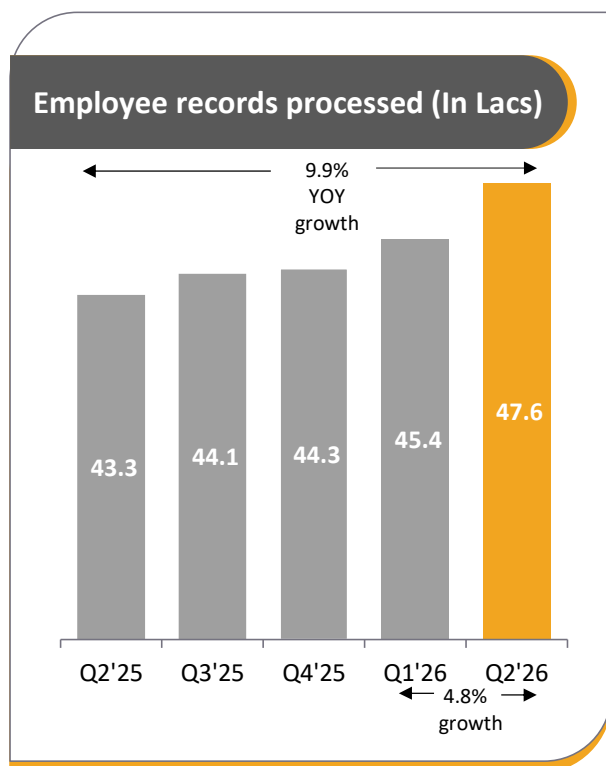


(Figures represent Rs crore; percentages indicates margins)

Quarterly trends



FTEs & Employee Records Processed



- T&D employee records processed up by 10.1% YoY & 4.9% QoQ
- T&D FTE up by 5.2% YoY
- BPM International FTE up by 13.8% YoY

Annexures

Income Statement

Particulars (in Rs. Cr)	Q2 FY26	Q1 FY26	QoQ	Q2 FY25	YoY	H1 FY26	H1 FY25	YoY
Revenue from Operations	147.4	143.9	2.4%	131.4	12.2%	291.3	260.8	11.7%
Employee Benefit Expenses	(83.1)	(84.2)	-1.3%	(75.8)	9.7%	(167.3)	(150.9)	10.8%
Other Expenses	(28.3)	(23.2)	22.1%	(24.9)	13.9%	(51.5)	(47.8)	7.7%
Total Expenses	(111.4)	(107.4)	3.7%	(100.6)	10.7%	(218.8)	(198.7)	10.1%
EBITDA	36.0	36.6	-1.4%	30.8	16.9%	72.6	62.0	17.1%
EBITDA Margin	24.4%	25.4%	-100 bps	23.4%	100 bps	24.9%	23.8%	110bps
Other Income	1.9	2.9	-34.5%	(0.3)	-860.0%	4.8	2.6	86.5%
Finance Cost	(2.1)	(1.9)	10.5%	(1.0)	101.9%	(4.0)	(2.1)	89.2%
Depreciation and Amortisation	(14.8)	(13.4)	10.7%	(10.1)	46.6%	(28.3)	(19.9)	41.7%
PBT & Exceptional Item	21.0	24.2	-13.3%	19.4	8.1%	45.1	42.6	6.1%
Exceptional Item	0.0	0.0	0.0%	0.6	-100.0%	0.0	17.7	-100.0%
Profit Before Tax	21.0	24.2	-13.3%	20.0	4.8%	45.1	60.2	-25.1%
PBT Margin	14.2%	16.8%	-260 bps	15.2%	-100 bps	15.5%	23.1%	-761bps
Normal Tax	(3.4)	(9.3)	-63.8%	(7.9)	-57.2%	(12.6)	(16.2)	-21.8%
Profit After Tax	17.6	14.9	18.1%	12.1	45.5%	32.5	44.1	-26.3%
PAT Margin	11.9%	10.4%	160 bps	9.2%	272 bps	11.2%	16.9%	575bps
Basic and Diluted EPS (in Rs.)	11.6	9.8	18.0%	8.0	45.0%	21.3	28.9	-26.3%

Balance Sheet

Particulars (in Rs. Cr)	FY23	FY24	FY25	H1FY26
Assets				
Non-Current Assets				
Property, Plant and Equipment (inc CWIP)	12.2	21.7	27.6	30.6
Right of Use Assets	42.4	41.5	61.1	76.8
Other Intangible Assets (inc IAUD)	17.2	15.1	17.2	13.6
Other Non-Current Assets	27.1	38.4	21.5	26.0
	98.9	116.6	127.3	146.9
Current Assets				
Current Investments	46.8	56.3	82.7	85.3
Cash and Cash Equivalents	90.4	82.0	82.3	51.4
Trade Receivables	59.2	65.7	71.9	75.2
Unbilled Revenues & Financial assets	28.9	29.7	47.6	44.1
Other Current Assets	9.4	17.3	7.4	9.8
	234.7	251.0	291.9	265.7
Total Assets	333.6	367.6	419.3	412.5
Liabilities				
Equity and Reserves	229.7	245.5	259.5	247.6
Non-Current Liabilities				
Lease Liability	25.1	26.4	43.3	60.6
Other Non-Current Liability	7.7	9.3	8.0	11.3
	32.8	35.7	51.3	71.9
Current Liabilities				
Lease Liabilities	18.9	18.2	19.9	21.2
Trade Payables and Other Current Liabilities	52.2	68.2	88.6	71.8
	71.1	86.4	108.5	93.0
Total Equity and Liabilities	333.6	367.6	419.3	412.5

Cashflow Statement

Particulars (in Rs. Cr)	FY23	FY24	FY25	H1FY26
PBT	64.5	85.1	110.0	45.1
Add: Non Cash Expenses / Income	24.5	34.7	21.6	25.6
Operating Profit before Working Capital Changes	89.0	119.8	131.6	70.8
Changes in Working Capital and Tax Paid	(17.7)	(29.0)	(13.1)	(17.3)
Net Cash Generated from Operating Activities	71.3	90.8	118.5	53.5
Capex	(15.4)	(17.5)	(17.4)	(20.7)
Sale /(Purchase) of current investments (net) & Other Investing activity	(2.0)	(12.0)	(5.0)	(3.3)
Cash Flow from Investing Activities	(17.4)	(29.5)	(22.4)	(24.0)
Interest Paid	(3.7)	(3.8)	(3.8)	(3.5)
Payment of Lease Liabilities	(17.4)	(21.4)	(24.2)	(13.4)
Dividend Pay-out	(30.5)	(45.7)	(68.5)	(45.7)
Cash Flow from Financing Activities	(51.6)	(70.9)	(96.5)	(62.6)
Net Cash in Cash and Cash Equivalents	2.3	(9.6)	(0.4)	(33.1)
Opening Cash and Cash Equivalents	81.4	90.1	81.7	81.4
Exchange Rate Fluctuations	6.4	1.2	0.1	2.5
Closing Cash and Equivalents	90.1	81.7	81.4	50.8

The background of the slide is a warm, yellow-toned photograph of two business professionals in a handshake. The person on the right is wearing a light-colored shirt with a rolled-up sleeve, while the person on the left is in a dark suit. The handshake is the central focus, symbolizing agreement or partnership.

alldigi tech

A digitide company

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