

May 07, 2026

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,

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 fourth quarter and financial year ended March 31, 2026.

This is for your information and records.

For Alldigi Tech Limited
(Formerly known as Allsec Technologies Limited)

Shivani Sharma
Company Secretary and Compliance Officer
ACS-39590

Encl: a/a



alldigi tech

A digitide company

Q4 & FY26 Earnings Update

May 2026

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Q4 FY26: Strong YoY profitability with rising international contribution

Revenue				Reported EBITDA				PAT			
	₹ Cr	QoQ	YoY		₹ Cr	QoQ	YoY		₹ Cr	QoQ	YoY
Q4	154.7	↑1.3%	↑5.9%	Q4	43.7	↓4.9%	↑24.2%	Q4	28.9	↑38.6%	↑49.7%
FY-26	598.7		↑9.6%	FY-26	162.0		↑25.0%	FY-26	82.2		↓1.3%

Revenue Mix

- **Q4'26** : International Revenue up by 11.9% YoY and mix at 67.3% in Q4'26 as against 63.6% in Q4'25
- **FY'26** : International Revenue up by 14.1% YOY and mix at 65.5% in FY'26 as against 62.9% in FY'25
- **Q4'26** : Domestic Revenue down by 4.7% YoY and mix at 32.7% in Q4'26 as against 36.4% in Q4'25
- **FY'26** : Domestic Revenue up by 1.9% YOY and mix at 34.5 % in FY'26 as against 37.1% in FY'25

Platforms

- **PulseHR.ai**: AI-led input consolidation across email and SFTP sources, covering 6 templates through to payroll push — Ops UAT completion by 12 Jun 2026.
- **HRMS V2**: Integrated product rollout underway with a pilot customer in India; Phase 1 India release in 1st week of May, followed by Philippines (July) and UAE (August).
- **SP4 Migration**: India migration completed; Philippines product launch targeted for Aug 2026.

Employee records

- **Q4'26** : Employee records at 16.8 l for Mar'26 ; 49.9 lacs for Q4'26 which is higher by 12.7% YoY & 2.8% QoQ
- **FY'26** : Employee records at 191.5 lacs for FY'26 ; which is higher by 11.1% YoY

Service Delivery

- **T&D** - Payroll accuracy 99.86%, on time delivery 99.51% & Query TAT 96.06% - Employee records per FTE up 14.3% YoY & 6.9% QoQ
- **BPM** – Largely green service delivery across.

Human Resources

- Gender diversity up 1.2 % YoY

Contents



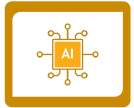
Company Overview



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



~**19 Million** employee records processed per annum- clear market leadership



5,00,000+ 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 Footprint Across India, Philippines and US



Chennai (HQ), Bangalore, Noida, India – ~4,100 Seats

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



Manila, Philippines – ~1600 Seats

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



New Jersey, USA

- Servicing 69 Countries
- Holding company India, Subsidiaries - US & Manila.
- Seats – Alldigi ~ 5,700 - India (~4,100) Manila (~1,600)
- Manila - Multi-lingual hub offering 12+ International languages using native speakers

Leading and growing provider of T&D(Payroll) 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



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



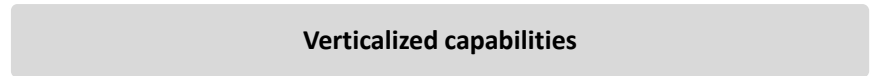
Transaction Processing



Collections – Verticalized Capabilities



Healthcare



Compliance



Key Business Highlights



Q4 FY26: Revenue up 5.9% YoY, EBITDA margin expands 416 bps, PAT up 49.7%

Financial

Q4 FY26 P&L highlights:

(in ₹ Crs.)		YOY%	QoQ%
Revenue	154.7	▲ 5.9%	▲ 1.3%
EBITDA	43.7	▲ 24.2%	▼ 4.9%

Balance Sheet:

Cash & Liquid Funds	147.7	▼ 17.4 Cr	▼ 21.0 Cr
OCF	45.3	▼ 5.9%	▲ 0.1%

- **Q4FY26 revenue** of ₹154.7Cr was up 1.3% QoQ and 5.9% YoY
- **EBITDA:** Increase YoY primarily due to operational efficiency and lower QoQ due to leave policy alignment in prior quarter
- Cash & Liquid funds lower on account of income tax refund in FY 25 and dividend payment of 45.71 Cr in Q4 FY'26

		YOY%	QoQ%
EBITDA Margin	28.2%	▲ 416bps	▼ 185bps
PAT (Crs)	28.9	▲ 49.7%	▲ 38.6%

Collection (Crs)	159.6	▲ 4.1%	▼ 1.8%
DSO (Billed & Unbilled)	70days	▲ 6 days	0 days

- **DSO days improved** by 6 days YoY on account of improved collections
- PAT higher YoY & QoQ on account of primarily linked to tax reversal.
- OCF is lower YoY due to receipt of Income tax refunds in Q4 FY'25

FY26: Revenue up 9.6%, EBITDA up 25.0%, with DSO improving by 8 days

Financial

FY26 P&L highlights:

(in ₹ Crs.)

			YOY%
Revenue	598.7	▲	9.6%
EBITDA	162.0	▲	25.0%

Balance Sheet:

Cash & Liquid Funds	147.7 Cr	▼	17.4 Cr
OCF	144.1 Cr	▲	18.8%

- **FY26 revenue** of ₹598.7Cr was up 9.6% YoY from growth across both Verticals
- OCF is lower YoY due to receipt of Income tax refunds in Q4'25.

YOY%

EBITDA Margin	27.1%	▲	333bps
PAT (Crs)	82.2	▼	1.3%

Collection (Crs)	626.1	▲	9.0%
DSO (Billed & Unbilled)	73days	▲	8 day

- **PAT** lower YoY on account of gain due to LLC divestment impact in FY'25
- **DSO** improved by 8 days on account of improved collections

Q4 FY'26 Business Highlights



Tech & Digital

- Tech & Digital revenue up by YoY 24.7%.
- Net employee records added : ~ 5.6 lacs, up by 12.7% YoY
- Q4 ACV ~ ₹ 14.0 Cr - 9 New logos
- 61% of the ACV originated from international / MCP opportunities.



BPM

- BPM International business up by 8.7% YoY
- BFSI and FGT continues to contribute significantly to this growth.
- ACV wins ~ ₹ 12 Cr added from account mining & hunting.



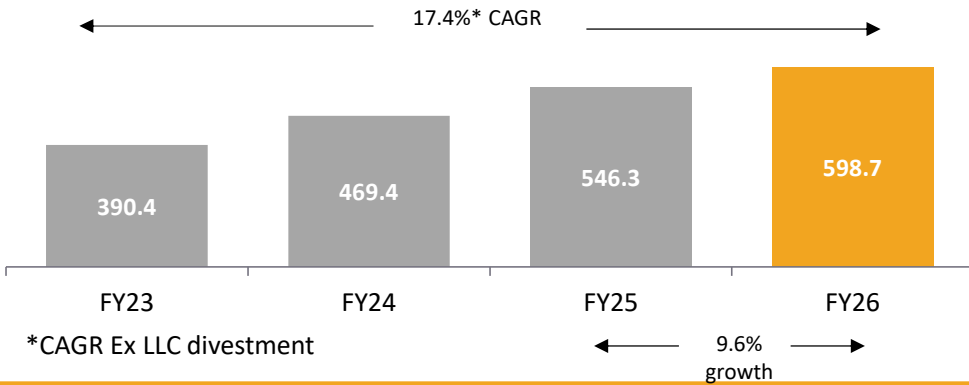
Financial Performance

Q4 FY26 Financial Highlights (1/2)

Revenue

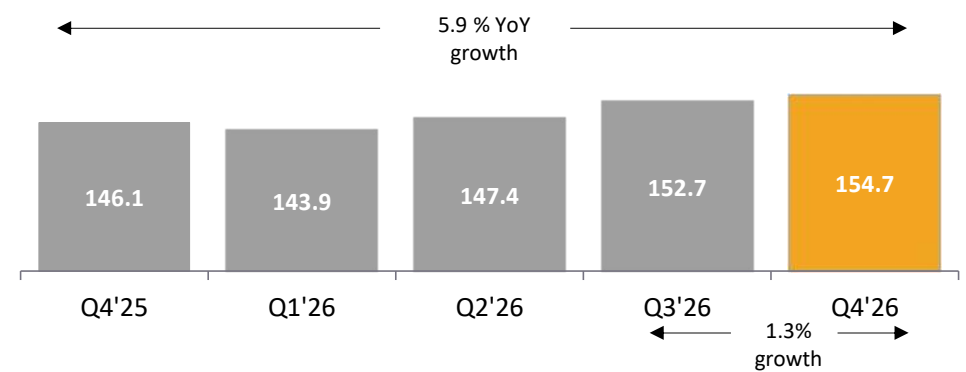
(Figures represent Rs crore)

Yearly trends



(Figures represent Rs crore)

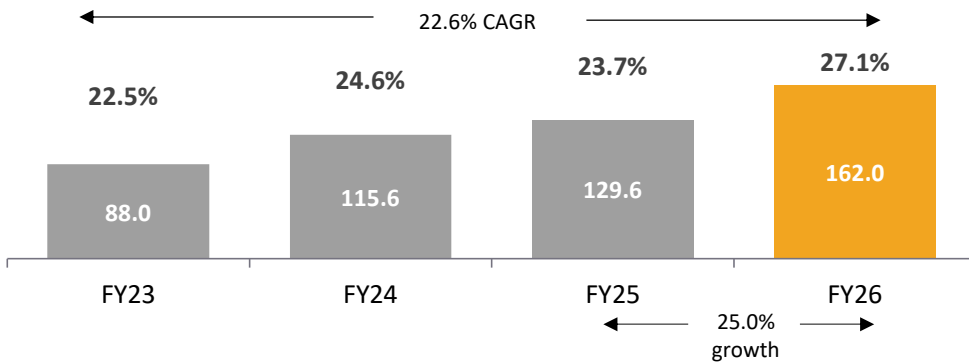
Quarterly trends



EBITDA and EBITDA%

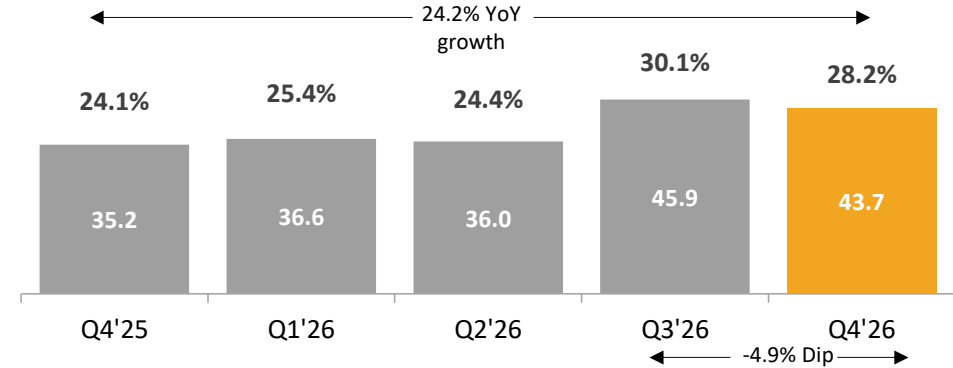
(Figures represent Rs crore; percentages indicates margins)

Yearly trends



(Figures represent Rs crore; percentages indicates margins)

Quarterly trends

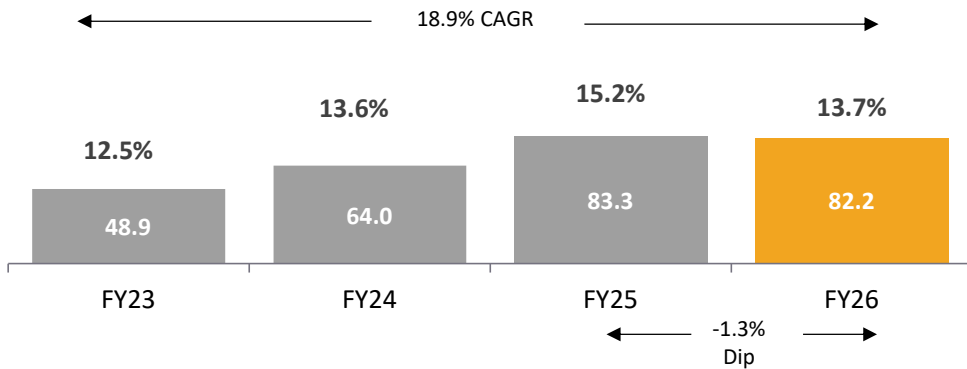


Q4 FY26 Financial Highlights (2/2)

PAT and PAT%

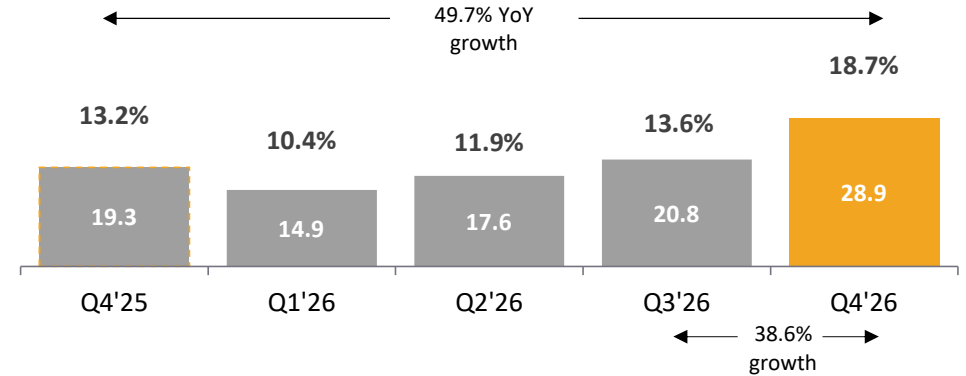
(Figures represent Rs crore; percentages indicates margins)

Yearly trends



(Figures represent Rs crore; percentages indicates margins)

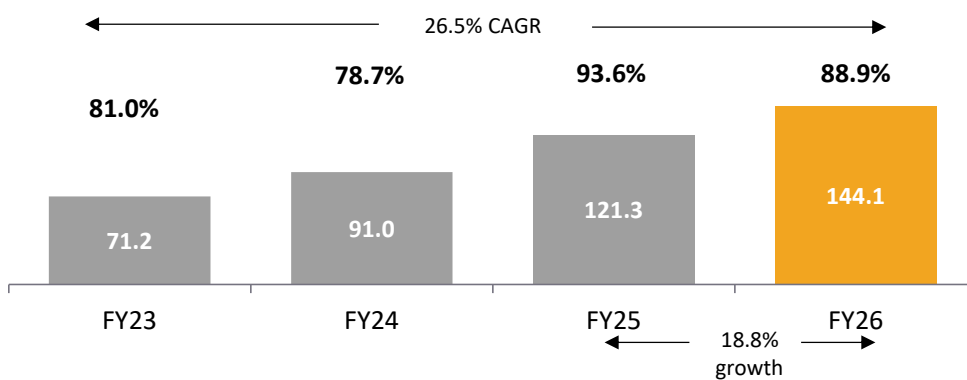
Quarterly trends



OCF and OCF Conversion%

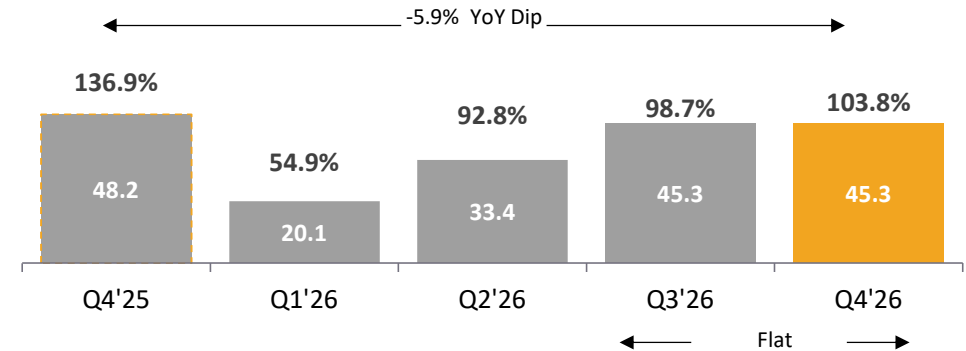
(Figures represent Rs crore; percentages indicates OCF conversion)

Yearly trends



(Figures represent Rs crore; percentages indicates OCF conversion)

Quarterly trends





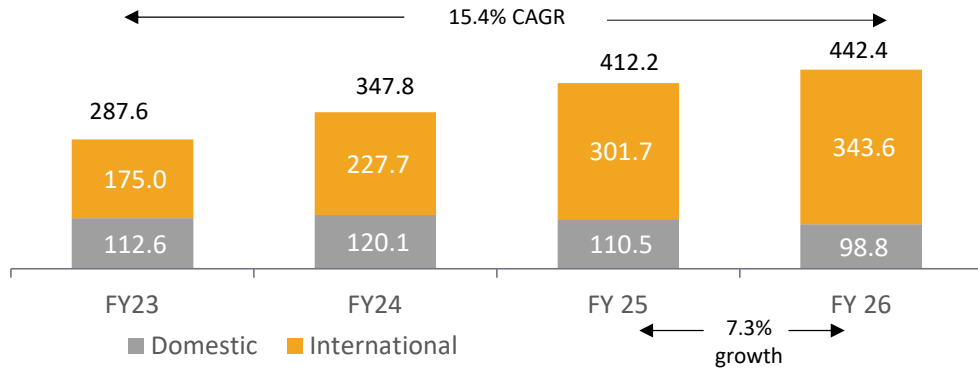
Business Segment Updates

BPM – International revenue up 8.7% YoY in Q4, offsetting domestic decline

Segment Revenue

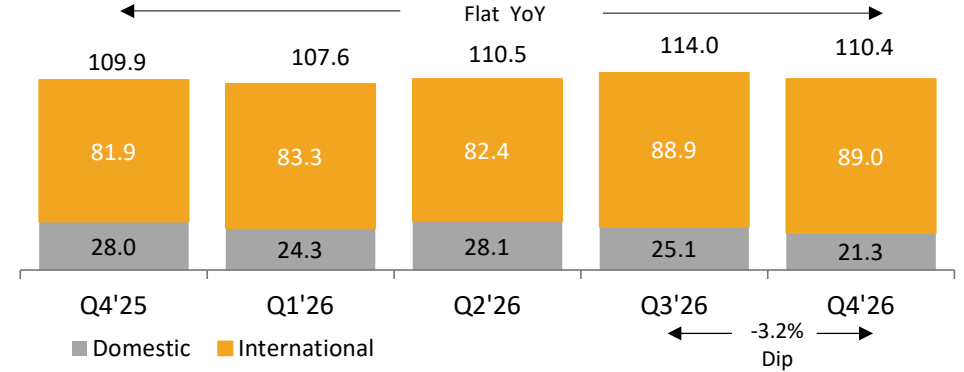
(Figures represent Rs crore)

Yearly trends



(Figures represent Rs crore)

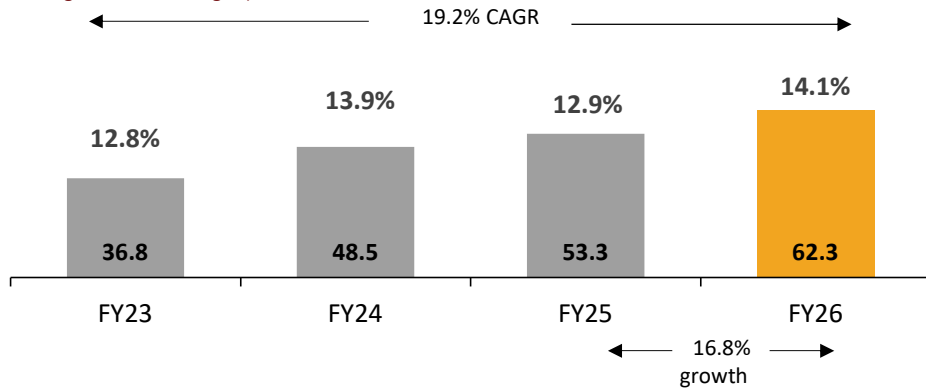
Quarterly trends



Segment Margin and Margin %

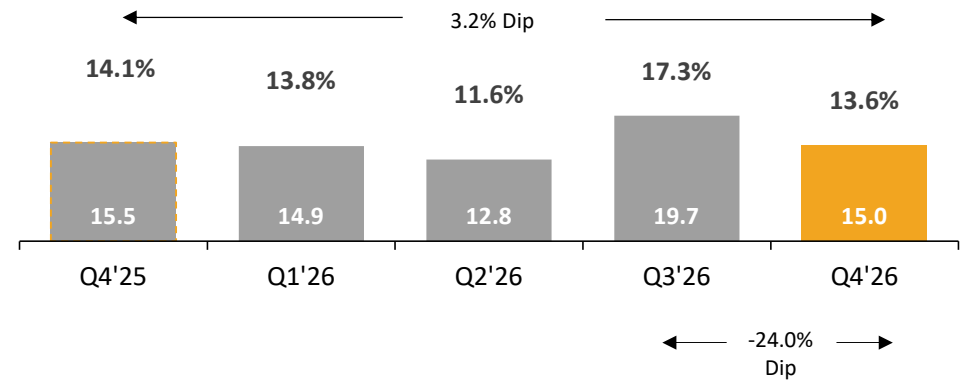
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Yearly trends



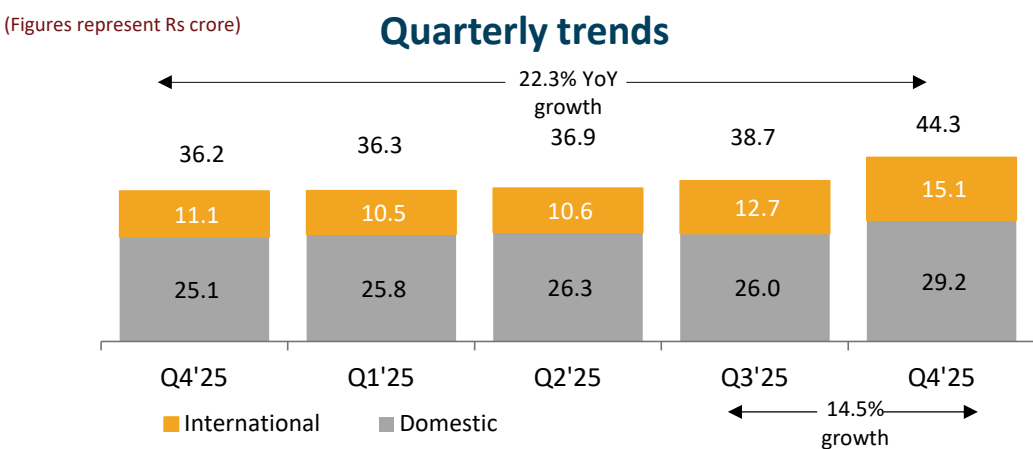
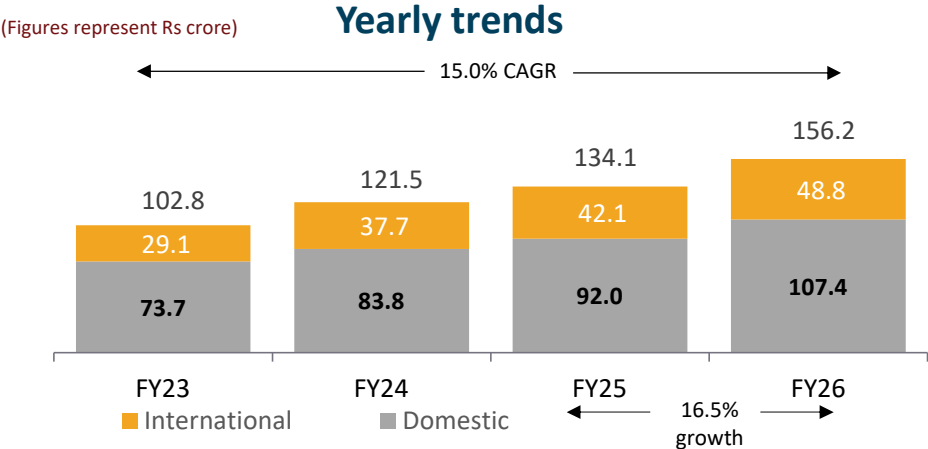
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Quarterly trends

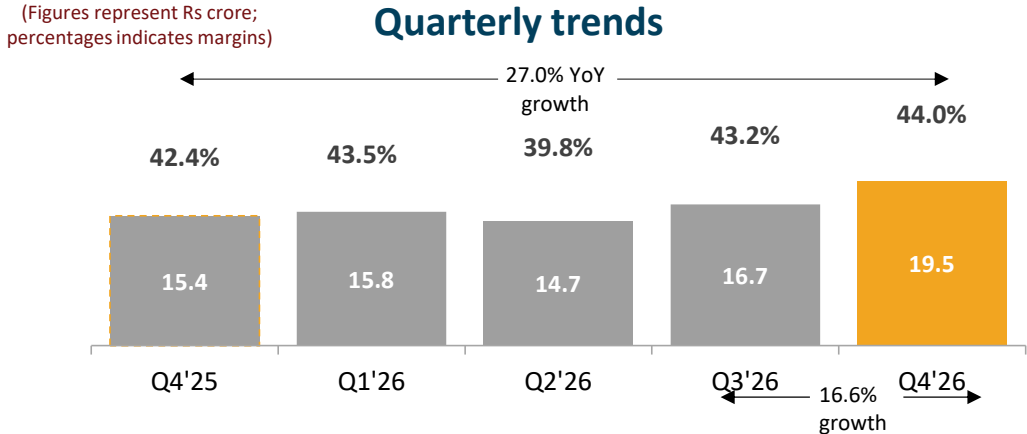
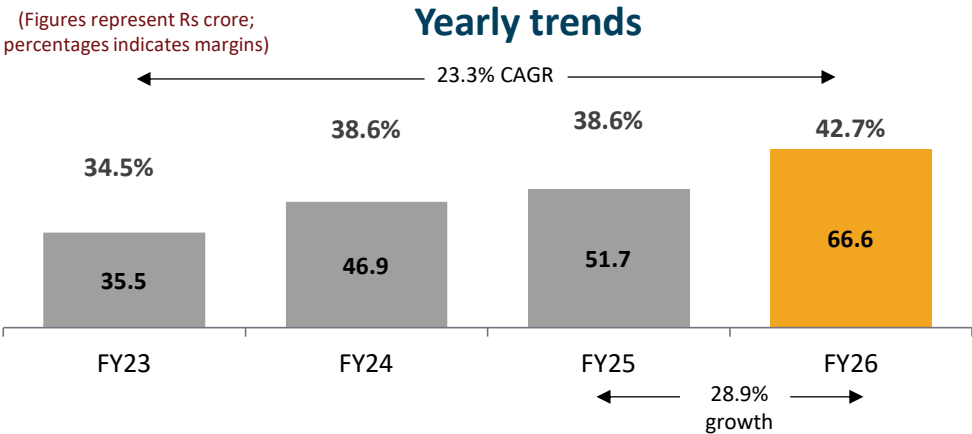


Tech & Digital – Strong Revenue Growth with 42.7% Segment Margin

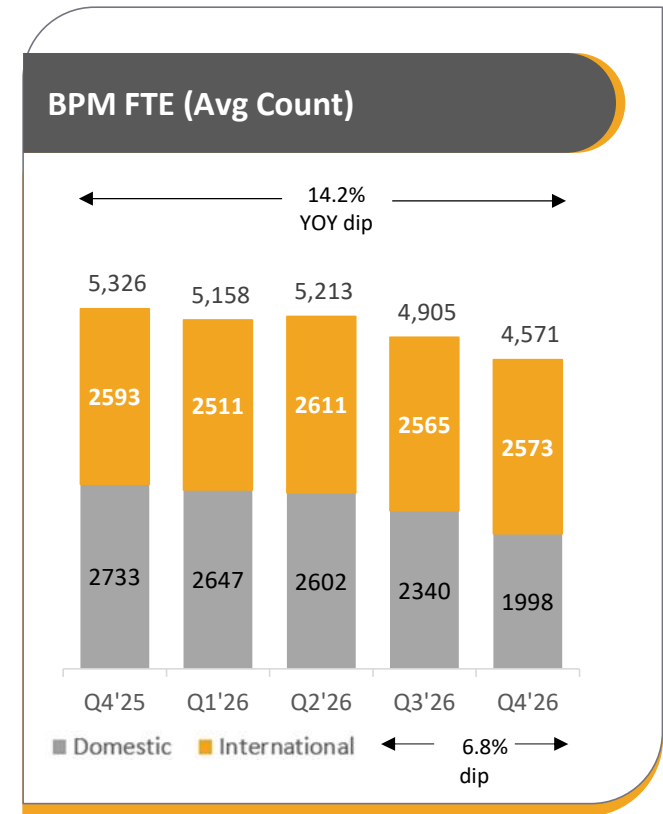
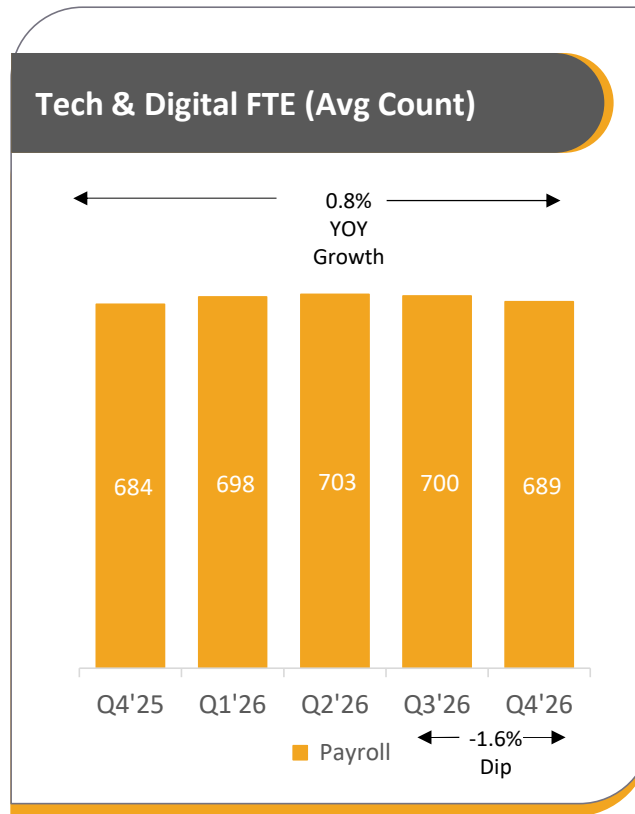
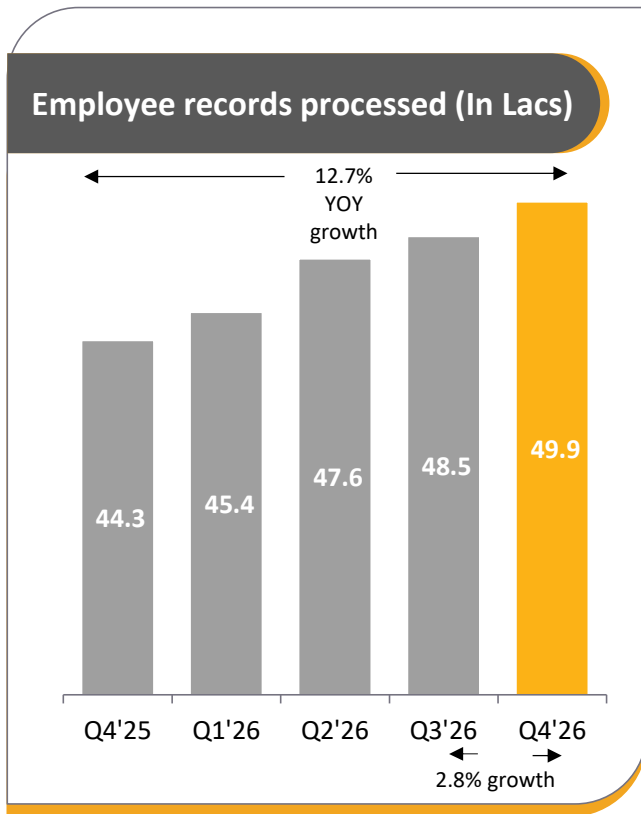
Segment Revenue



Segment Margin and Margin %



Operating Leverage: Employee Records Growth with Stable T&D FTE Base



- T&D employee records processed up by 12.7% YoY & 2.8% QoQ
- T&D FTE up by 0.8% YoY
- BPM International FTE flat QoQ



Annexures

Income Statement

Particulars (in ₹ Cr)	Q4 FY26	Q3 FY26	Q4 FY25	QoQ	YoY
Revenue from operations	154.7	152.7	146.1	1.3%	5.9%
Employee benefits expense	83.7	80.2	82.5	4.3%	1.4%
Other expenses	27.4	26.6	28.4	2.9%	-3.8%
EBITDA	43.7	45.9	35.2	-4.9%	24.2%
<i>EBITDA Margin %</i>	<i>28.2%</i>	<i>30.1%</i>	<i>24.1%</i>	<i>-184bps</i>	<i>416bps</i>
Depreciation & amortisation	15.9	14.4	12.2	10.4%	30.6%
Finance Cost	2.7	2.0	1.5	33.5%	78.0%
Other Income	-2.2	-2.3	-4.6	-6.4%	-52.5%
Exceptional Items	3.8	4.0	0.8	-5.7%	373.8%
PBT	23.5	27.8	25.3		
Tax	-5.4	7.0	6.0	-177.4%	-189.7%
PAT	28.9	20.9	19.3		
<i>PAT Margin %</i>	<i>18.7%</i>	<i>13.7%</i>	<i>13.2%</i>	<i>500bps</i>	<i>547bps</i>
Adj PAT	32.7	24.9	20.1		
<i>Adj PAT Margin %</i>	<i>21.1%</i>	<i>16.3%</i>	<i>13.8%</i>	<i>482bps</i>	<i>737bps</i>
EPS in ₹	19.0	13.7	12.7		

FY26	FY25	YoY
598.7	546.3	9.6%
331.2	312.7	5.9%
105.5	104.0	1.4%
162.0	129.6	25.0%
<i>27.1%</i>	<i>23.7%</i>	<i>334bps</i>
58.6	42.7	37.2%
8.7	4.6	89.1%
-9.4	-10.8	-13.2%
7.8	-16.9	-146.2%
96.3	110.0	
14.1	26.7	-47.2%
82.2	83.3	
<i>13.7%</i>	<i>15.2%</i>	<i>-151bps</i>
90.0	66.4	
<i>15.0%</i>	<i>12.2%</i>	<i>289bps</i>
54.0	54.7	

Balance Sheet

Particulars (in ₹ Cr)	As on 31st Mar 26	As on 31st Mar 25
Assets		
PPE, CWIP and Other intangibles	40.3	44.7
Right-of-use assets	168.6	61.1
Goodwill	0.0	0.0
Other non-current assets	31.2	21.5
Non-current assets	240.1	127.3
Trade receivables and Unbilled	69.3	71.9
Cash and cash equivalents	88.6	82.3
Other current assets	121.2	137.7
Current assets	279.1	291.9
Total Assets	519.1	419.3
Equity and Liabilities		
Total Equity	251.0	259.5
Borrowings-non current	0.0	0.0
Lease liabilities-non-current	142.5	43.3
Other non-current liabilities	18.7	8.0
Non-current liabilities	161.2	51.4
Borrowings-current	0.0	0.0
Lease liabilities-current	28.2	19.9
Other current liabilities	78.8	88.6
Current liabilities	106.9	108.4
Total Equity and Liabilities	519.1	419.3

Cashflow Statement ₹ Cr

Particulars (in ₹ Cr)	FY26	FY25
Cash flows from operating activities		
Profit before tax	96.4	110.0
Non Cash Expenses/ (Income)	61.9	21.6
Changes in operating assets and liabilities	10.5	-15.7
Cash generated from operations	168.9	115.9
Income taxes paid	-24.8	2.6
Net cash flows from operating activities (A)	144.1	118.5
Cash flows from investing activities		
Capex (net)	-28.2	-17.4
Interest received	-3.8	-2.6
Bank Deposits/ Mutual funds	16.7	-2.3
Profit on sale of PPE	-	-
Net cash from / (used in) investing activities (B)	-15.3	-22.4
Cash flows from financing activities		
Repayments of Borrowings	-	-
Proceeds/(repayments) from/(of) leases	-28.4	-24.2
Payment of dividend	-91.4	-68.5
Interest paid	-7.5	-3.8
Net cash from / (used in) Financing activities (C)	-127.4	-96.5
Net increase /(decrease) in cash and cash equivalents (A+B+C)	1.5	-0.5
Effect of exchange differences on cash & cash equivalents held in f	1.86	0.14
Cash and cash equivalents at the beginning of the period	81.4	81.7
Cash and cash equivalents at the end of the period	84.7	81.4



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