



Saksoft Limited

COMPANY BACKGROUND.....

- Saksoft is a global IT services company with recognized leadership in Information Management Solutions, Application Development and Testing Services.
- It was founded in 2000, today is a leading Digital Transformation Solution Partner for clients across the globe. The Company's headquarters are in Chennai (India) and has 16 offices across India, Europe, Asia and USA.
- Saksoft is a forward-looking digitalization partner for mid-sized global companies. It's custom enabled Cloud Enterprise Applications and Omni Channel solutions allow businesses to access real-time information that it wants, when they want to, and where they want it.
- It's expertise in Augmented Analytics solutions like Predictive, Prescriptive analytics using AI/ML, NLP, etc. help convert your data to a decision, personalize your marketing efforts and improve speed and accuracy through intelligent decision automation.

BUSINESS MIX (AS OF H1-FY26).....

- BFS (31%):** Being a niche in Fintech space since 20+ years and delivering a range of applications and solutions, it's able to leverage on its expertise to service better.
- Emerging Verticals (47%):** With billions of data generated and consumed every second, media, telecom sector is bracing itself for huge data traffic and Saksoft has helped to create a value chain for their customers and opened new avenues.
- Logistics (14%):** Dreamorbit of the Saksoft group provides next-gen technology-based solutions to Logistics and Fin-Tech industry.
- Commerce (8%):** Saksoft's retail solutions are fueled by our domain expertise combined with its retail experience in building end-to-end retail solutions that solve complex challenges. It supplements areas such as customer engagement, eCommerce, Sales & Marketing, Supply chain, and Pricing.

KEY STRENGTHS.....

- Task Force:** Experienced and dedicated management team with a diversified board.
- The Company has lucrative **multiyear contracts** with well-known brands that guarantee revenue visibility.
- Cross-selling and upselling** by the company aided in its development as a full-service provider.
- Domain-specific solutions:** A trustworthy digital partner because of its extensive expertise of the numerous industries it offers digital solutions for.
- Customer-fit:** Focus on clients with revenues ranging from USD 100 million to USD 3 billion- not too large to lose the customer perspective nor too little to be unable to spend appropriately.
- Verticals specialization:** Concentration on a few verticals that are motivated by evolving lifestyle relevance and Comprehensive solutions
- Consistent focus on digitalisation-driven** transformation along with Early entrant with a strong track record of successful digitalization driven projects and financial metrics

FINANCIAL PERFORMANCE.....

(INR Mn)	Operational Income	EBITDA	EBITDA%	PAT	PAT%	EPS
FY23	6,656	1,082	16.25%	820	12.32%	8.18
FY24	7,616	1,367	17.95%	962	12.63%	9.59
FY25	8,830	1,463	16.56%	1,088	12.32%	8.21
H1-FY26	5,076	964	19.00%	683	13.46%	5.34

Key Data

BSE Code	590051
NSE Code	SAKSOFT
Reuters	SAKS.NS
Bloomberg	SAK:IN

Market Data (INR) as on 30th September, 2025

Face Value	1.00
CMP	198.10
52 Week H/L	278.10/119.55
MCAP (Mn)	26,258.40
Shares O/S (Mn)	132.55
1 Yr Avg. Vol. ('000)	468.48

Performance as on 30th September, 2025

	3M	6M	12M
SAKSOFT	(1.59)%	33.81%	(27.18)%
SENSEX	(4.08)%	4.40%	(4.73)%
BSE SMALLCAP	(4.85)%	11.94%	(8.85)%

Shareholding Pattern as on 30th September, 2025

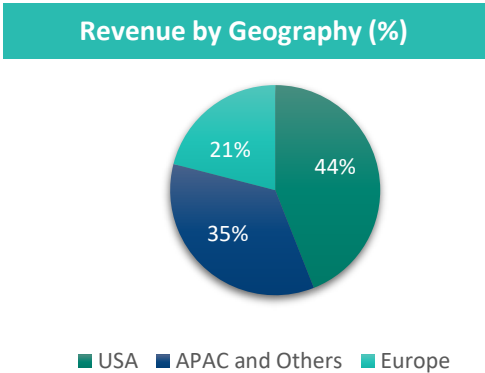
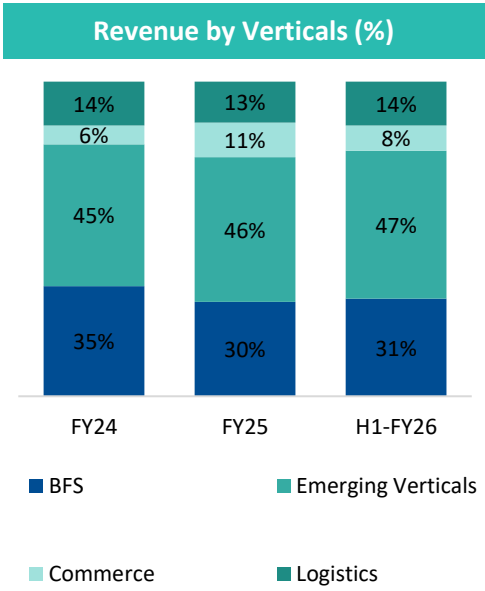
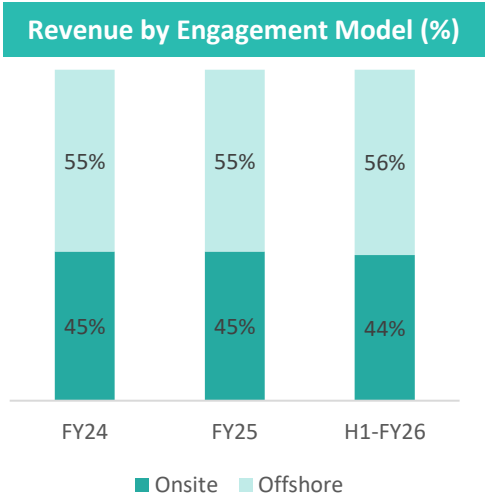
Promoters	66.68%
Public	27.46%
FPI	2.29%
Employee trust	3.57%

BUSINESS SEGMENTS.....

- **BFS:** It’s offerings include Mobile Cash Disbursement Solution, API Integration, Mobile/Web Development, Credit Scoring, Fraud prevention, etc. Increased internet penetration coupled with the growing popularity of digital payments & wallets is a key growth driver.
- **Emerging Vertical:** It provides Share Point Development, Advance Analytics to reduce customer churn, Oracle Support and Testing COE.
- **Logistics:** It provides IoT solutions, Freight management software, Supply chain management, EDI integration, etc. It purchased MC Consulting, a Singapore-based company that specializes in offering technology-based business solutions, in February 2022.
- **Public Sector:** Offerings include Smart cities - Machine learning & facial recognition from IoT data feeds, Predictive Analytics & BI to provide better healthcare, etc. Acuma was acquired in 2006, it is an IM focused company focusing on the public sector.
- **Commerce:** Offerings include social Listening (Micro Influencer), Customer 360, Customer Journey Tracking and ECommerce Portal Development. Solveda, a US based Digital Ecommerce solution company was acquired in August 2023.

GROWTH DRIVERS.....

- **Inch-wide and Mile deep strategy:** It focuses on niche verticals and offerings by investing in digital assets and frameworks such as UNITE, STAQK, SAQAMA.
- **String of Pearls approach strategy:** Executed through timely and complementary acquisitions that widened our services. This strategy helps to increase its capability without much gestation period.
- **Value over Volume:** Address empty territories represented by more profitable projects and broad- base its operations.
- **Agility:** Continue its operations with a mid-tier corporation with few decision-making layers, which increases its agility.
- **Cost Leadership:** Saksoft has invested in the offshore delivery model, a validated cost-effective approach.
- **Build Strong Team:** The company will seek to recruit creatively and aggressively to achieve its growth ambition.
- **Focus on Emerging Sectors:** Addressing the sweep of digitization to help clients enhance operational efficiency.



PEER COMPARISON (TRAILING 12 MONTHS) (INR MN)

Company	Operational Income	EBITDA	EBITDA%	Net Profit	PAT%	Market Cap
Saksoft Ltd.	9,743	1,709	17.54%	1,254	12.87%	26,517
Zensar Technologies Ltd.	53,776	8,310	15.5%	6,735	12.5%	1,75,825
Mphasis Ltd.	1,49,058	28,070	18.83%	17,870	11.99%	5,02,808
Persistent Systems Ltd.	1,32,187	24,169	18.28%	16,652	12.60%	7,74,579
LTI Mindtree Ltd.	39,6675	67,690	17.06%	48,511	12.23%	14,99,721

INCOME STATEMENT (CONSOLIDATED)

PARTICULARS (INR MN)	FY23	FY24	FY25	H1-FY26
Operating Income	6,656	7,616	8,830	5,076
Expenses	5,574	6,249	7,368	4,111
Operating EBITDA	1,082	1,367	1,463	964
Operating EBITDA Margins (%)	16.25%	17.95%	16.56%	19.00%
Depreciation	100	119	126	66
Finance Cost	22	35	85	51
Other Income	94	69	168	96
PBT	1,054	1,282	1,420	943
Tax	234	320	332	260
Profit After Tax	820	962	1,088	683
PAT Margins (%)	12.32%	12.63%	12.32%	13.46%
Other Comprehensive Income	85	80	106	178
Total Comprehensive Income	905	1,042	1,194	861
EPS Basic (INR)	8.18	9.59	8.21	5.34

BALANCE SHEET (CONSOLIDATED)

PARTICULARS (INR MN)	FY24	FY25	H1-FY26
EQUITIES & LIABILITIES			
Equity			
(A) Equity Share Capital	101	127	128
(B) Other Equity	4,953	6,064	6,899
Total Equity	5,054	6,191	7,027
Non-Current Liabilities			
(A) Financial Liabilities			
(i) Borrowings	73	326	227
(ii) Other Financial liabilities	302	396	—
(iii) Lease liabilities	124	126	90
(B) Provisions	151	210	246
(C) Other Non-Current Liabilities	—	—	—
Total Non – Current Liabilities	650	1058	563
Current Liabilities			
(A) Financial Liabilities			
(i) Borrowings	11	217	99
(ii) Trade Payables	359	309	237
(iii) Lease Liabilities	56	85	98
(iv) Other Financial Liabilities	483	871	679
(B) Other Current Liabilities	1157	1,068	1,090
(C) Provisions	94	129	183
Total Current Liabilities	2,160	2,679	2,386
GRAND TOTAL - EQUITIES & LIABILITES	7,864	9,928	9,976

PARTICULARS (INR MN)	FY24	FY25	H1-FY26
ASSETS			
Non-Current Assets			
(A) Property, Plant and Equipment	146	137	133
(B) Right-of-Use Assets	149	176	148
(C) Goodwill on Consolidation	3,270	4,888	5,044
(D) Other Intangible Assets	4	3	—
(E) Financial Assets			
(i) Investments	—	—	—
(ii) Other Financial Assets	31	69	36
(F) Deferred Tax Assets (Net)	86	141	153
(G) Other Non-Current Assets	—	—	—
Total Non – Current Assets	3,686	5,414	5,514
Current Assets			
(A) Financial Assets			
(i) Investments	145	—	—
(ii) Trade Receivables	1,620	1,940	1,969
(iii) Loans	17	—	—
(iv) Cash & Cash Equivalents	1418	1,683	1,674
(v) Bank balances other than (ii) above	507	290	140
(v) Other Financial Assets	178	253	381
(B) Current Tax Assets (Net)	40	25	21
(C) Other Current Assets	253	295	276
Total Current Assets	4,178	4,514	4,462
GRAND TOTAL – ASSETS	7,864	9,928	9,976

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