



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 Q1 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
Q1-FY26	2,491	458	18.40%	323	12.99%	2.54

Key Data

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

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

Face Value	1.00
CMP	201.2
52 Week H/L	319.00/119.55
MCAP (Mn)	26,669.31
Shares O/S (Mn)	132.55
1 Yr Avg. Vol. ('000)	415.13

Performance as on 30th June, 2025

	3M	6M	12M
SAKSOFT	35.90%	-6.29%	-9.65%
SENSEX	8.75%	6.82%	5.77%
BSE SMALLCAP	17.29%	-1.21%	4.36%

Shareholding Pattern as on 30th June, 2025

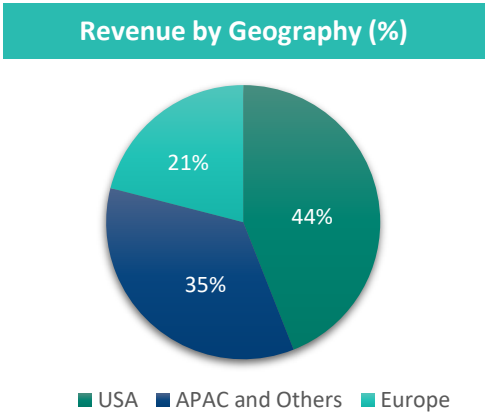
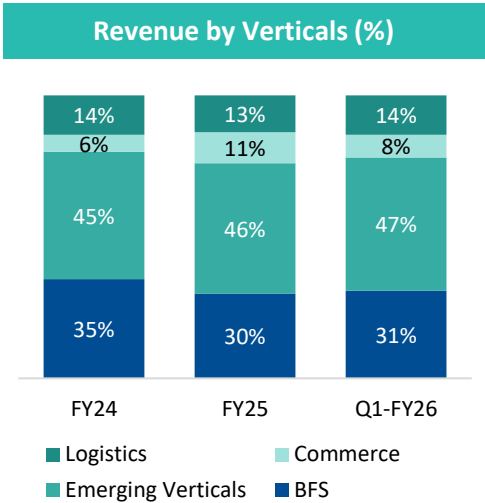
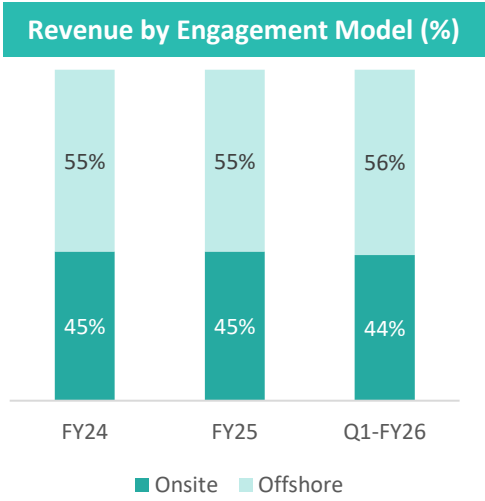
Promoters	66.68%
Public	26.49%
FPI	2.79%
Employee trust	4.04%

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.	9,311	1,571	16.87%	1,155	12.41%	26,669.31
Zensar Technologies Ltd.	53,776	8,310	15.45%	6,735	12.52%	1,59,230
Mphasis Ltd.	1,45,394	27,315	18.79%	17,396	11.96%	5,41,224
Persistent Systems Ltd.	1,25,352	22,145	17.67%	15,187	12.12%	9,45383
LTI Mindtree Ltd.	3,87,065	65,378	16.89%	47,219	12.20%	15,75,498

INCOME STATEMENT (CONSOLIDATED)

PARTICULARS (INR MN)	FY23	FY24	FY25	Q1-FY26
Operating Income	6,656	7,616	8,830	2,491
Expenses	5,574	6,249	7,368	2,032
Operating EBITDA	1,082	1,367	1,463	458
Operating EBITDA Margins (%)	16.25%	17.95%	16.56%	18.40%
Depreciation	100	119	126	33
Finance Cost	22	35	85	28
Other Income	94	69	168	33
PBT	1,054	1,282	1,420	430
Tax	234	320	332	107
Profit After Tax	820	962	1,088	323
PAT Margins (%)	12.32%	12.63%	12.32%	12.99%
Other Comprehensive Income	85	80	106	143
Total Comprehensive Income	905	1,042	1,194	466
EPS Basic (INR)	8.18	9.59	8.21	2.54

BALANCE SHEET (CONSOLIDATED)

PARTICULARS (INR MN)	FY23	FY24	FY25	PARTICULARS (INR MN)	FY23	FY24	FY25
EQUITIES & LIABILITIES				ASSETS			
Equity				Non-Current Assets			
(A) Equity Share Capital	100	101	127	(A) Property, Plant and Equipment	147	146	137
(B) Other Equity	3,945	4,953	6,064	(B) Right-of-Use Assets	128	149	176
Total Equity	4,045	5,054	6,191	(C) Goodwill on Consolidation	1,903	3,270	4,888
Non-Current Liabilities				(C) Other Intangible Assets	5	4	3
(A) Financial Liabilities				(D) Financial Assets			
(i) Borrowings	-	73	326	(i) Investments	-	-	
(ii) Other Financial liabilities	41	302	396	(ii) Other Financial Assets	170	31	69
(iii) Lease liabilities	81	124	126	(E) Deferred Tax Assets (Net)	73	86	141
(B) Provisions	102	151	210	(F) Other Non-Current Assets	-	-	-
(C) Other Non-Current Liabilities	-	-	-	Total Non – Current Assets	2,426	3,686	5,414
Total Non – Current Liabilities	224	650	1,058	Current Assets			
Current Liabilities				(A) Financial Assets			
(A) Financial Liabilities				(i) Investments	90	145	-
(i) Borrowings	-	11	217	(ii) Trade Receivables	1,164	1,620	1,940
(ii) Trade Payables	257	359	309	(iii) Loans	2	17	-
(iii) Lease Liabilities	54	56	85	(iv) Cash & Cash Equivalents	879	1,418	1,683
(iv) Other Financial Liabilities	153	483	871	(v) Bank balances other than (ii) above	557	507	290
(B) Other Current Liabilities	858	1,157	1,068	(v) Other Financial Assets	249	178	253
(C) Provisions	90	94	129	(B) Current Tax Assets (Net)	33	40	53
Total Current Liabilities	1,412	2,160	2,679	(C) Other Current Assets	281	253	295
GRAND TOTAL - EQUITIES & LIABILITES	5,681	7,864	9,928	Total Current Assets	3,255	4,178	4,514
				GRAND TOTAL – ASSETS	5,681	7,864	9,928

Name	Designation	Email	Phone
Anuj Sonpal	CEO	anuj@valoremadvisors.com	+91-22-4903-9500
Purvangi Jain	AVP	purvangi@valoremadvisors.com	+91-22-4903-9536
Nupur Jainkunia	AVP	nupurj@valoremadvisors.com	+91-22-4903-9536

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