1 Arisinfra Solutions Ltd

Arisinfra Solutions Limited is a tech-enabled B2B company focused on simplifying procurement of construction materials across India. The company operates an asset-light, aggregator-led model integrating sourcing, quality control, logistics, and documentation into a unified digital supply chain. It serves leading infrastructure and real estate developers through a diversified product portfolio including aggregates, RMC, steel, cement, and construction chemicals. With a 3,200+ client base, ~78% repeat order rate, and a network of 2,100+ vendors, it enables efficient and scalable delivery across multiple project locations nationwide.

2 Business Segments (FY26)

- **B2B Supply (44%):** The company provides developers and contractors with efficient procurement solutions for construction projects through its network of manufacturers and suppliers. Its diversified product portfolio includes aggregates, RMC, walling solutions, chemicals, steel, cement, tiles, electricals, plumbing, and other allied construction materials. By building a broad network of trusted SME/MSME suppliers across regions and leveraging its in-house technology platform, the company delivers full-stack supply chain execution covering sourcing, quality checks, logistics, delivery tracking, and documentation.
- **Contract Manufacturing (47%):** The company secures long-term contract manufacturing partnerships with manufacturers that have underutilized production capacity, enabling manufacturing-level economics without owning assets. The company follows an asset-light model that keeps fixed costs low while supporting higher returns on capital. By reserving production capacity in advance with partner factories instead of purchasing materials from the open market, it improves price visibility and stabilizes margins. This approach also enhances plant utilization for partner manufacturers, creating a mutually beneficial growth model, while contractual safeguards such as fair pricing commitments, audit rights, and damage protection help manage risks and maintain financial discipline.
- **Services (9%):** Through ArisUnitern RE Solutions, the company operates a developer-as-a-service model for real estate developers, managing the entire project lifecycle from arranging funds, material procurement, sales, marketing, and collections. It acts as a single coordination platform connecting lenders, contractors, vendors, and channel partners, while helping complete ongoing projects and revive stressed developments. By integrating project management with its procurement network, the company enables faster execution and improved project outcomes. Currently, the services portfolio includes 8 active projects with an estimated gross development value of INR 12,323 Mn and ~2.0 Mn sq. ft. under execution.

3 Key Strengths

- End-to-end digital procurement platform enabling seamless sourcing, pricing, and documentation.
- Asset-light expansion model with minimal capex and no inventory ownership.
- Execution-led operating model ensuring control over sourcing, quality, and delivery.
- Strong network and platform advantage with a large base of institutional customers and vendors.
- AI-led working capital management through real-time credit monitoring and optimized cycles.

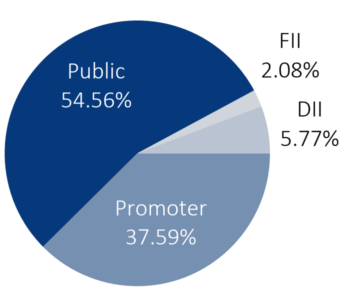
4 Key Growth Drivers

- Working capital and credit optimization through supply chain financing to enhance funding access and support scalable growth.
- Expanding the product portfolio across high-margin construction materials and allied categories to increase wallet share and platform depth.
- Geographic expansion across high-growth infrastructure corridors and Tier I/Tier II real estate markets.
- Scaling contract manufacturing partnerships and expanding the services vertical to enhance operating leverage.

Key Financials	FY23	FY24	FY25	FY26
Revenue from Operations (INR Mn)	7,461	6,968	7,677	10,675
Sales Growth (Y-O-Y)	*64.96%*	*(6.61)%*	*10.18%*	*39.05%*
EBITDA (INR Mn)	(7)	128	501	1,007
EBITDA Margins (%)	*(0.09)%*	*1.84%*	*6.53%*	*9.43%*
Net Profit (INR Mn)	(154)	(173)	60	603
Net Profit Margins (%)	*(2.06)%*	*(2.48)%*	*0.78%*	*5.65%*
Diluted EPS (INR)	(4.13)	(5.30)	0.36	6.84
Diluted EPS Growth (Y-O-Y)	*NA*	*NA*	*NA*	*NA*

Key Financial Ratios	FY26
Net Debt to Equity	-0.09x
Asset Turnover	1.23x
Interest Coverage Ratio	3.82x
Return on Equity	12%
Return on Capital Employed	21%
Debtor Days	126
Net Working Capital Days	66

Shareholding Pattern



Capital Structure	
Share Price as on 31st Mar, 2026	96.10
Number of Shares o/s (Mn)	81.76
Market Capitalisation (INR Mn)	7,857
Add: Debt (INR Mn)	548
Less: Cash & Equivalents (INR Mn)	1,192
Enterprise Value (INR Mn)	7,213
Networth (INR Mn)	7,510

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