

1 Xtranet Technologies Ltd

Established in 2002, Xtranet Technologies is an integrated technology solutions provider with 24+ years of experience, offering solutions across data centre infrastructure, IT solutions, enterprise applications, digital services, managed services and proprietary technology platforms. Its platforms include SYNERGY, a low-code digital transformation platform, and XtraTrust, focused on digital trust and PKI-based authentication. The company serves government, PSUs and private enterprises across sectors including BFSI, utilities, transportation and manufacturing, combining project-based execution with recurring managed services and platform-led revenues. Xtranet has executed 175 projects across multiple Indian states during FY24–FY26, with a focus on digital infrastructure, e-Governance, smart cities and enterprise technology solutions.

2 Business Segments (Q1-FY27)

- **Data Centre Infrastructure & IT Operations (48%)** : XtraNet provides end-to-end data centre and IT infrastructure management, covering servers, storage, networks, virtualization, cybersecurity, backup and disaster recovery. It also provides 24x7 monitoring and maintenance under long-term SLA-based contracts, creating recurring revenue.
- **Enterprise Applications (26%)** : The company end-to-end enterprise application and ERP services, covering ERP selection, design, configuration, customization, implementation and ongoing support across functions such as finance, HR, supply chain, procurement and billing. It also develops and maintains enterprise, government, web and mobile applications.
- **Proprietary Platforms (14%)** : XtraNet develops and operates its own technology platforms, particularly XtraTrust, which enables secure authentication, digital signatures and trusted digital transactions. It is also a Government of India-approved Certifying Authority for Digital Signature Certificates and e-Sign services.
- **Digital Services (12%)** : This segment focuses on digital transformation using technologies such as AI, IoT, blockchain, cloud and analytics. Its Synergy low-code platform helps enterprises build applications faster, automate workflows and reduce development costs.

3 Key Strengths

- High recurring and annuity-led revenue base, with Data Centre Infrastructure & IT Operations contributing 48% of Q1 FY27 revenue.
- Strong government and PSU positioning, contributing ~47% of FY26 revenue and supported by 175 projects executed during FY24–FY26.
- Diversified business mix across data centres, enterprise applications, digital services and proprietary platforms.
- Proven digital infrastructure capabilities, with 50+ data centres delivered and strong expertise in managed infrastructure services.
- Strong order book visibility of INR 3,730 Mn as of June 30, 2026, supporting medium-term revenue visibility.
- Proprietary technology platforms, Synergy and XtraTrust, enhance differentiation and support scalable digital deployments

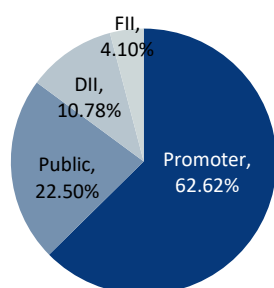
4 Key Growth Drivers

- Data centre & infrastructure expansion through modernization of data centres, disaster recovery sites and cybersecurity infrastructure.
- Scalable and modular infrastructure to improve efficiency and utilization, supported by automation, backup, virtualization and renewable energy adoption.
- Geographical expansion across new Indian states through government digitization, Smart City and utility modernization programs, alongside international expansion into the Middle East, Africa and Asia-Pacific markets.
- Expansion of platforms and services, with upgraded data centre, IT operations and digital services offerings, alongside the scaling of Synergy and XtraTrust to address evolving enterprise and government requirements.
- Technology innovation through investments in AI, ML, IoT, cloud, blockchain and edge computing.

Key Financials	FY24	FY25	FY26	Q1-FY27
Revenue from Operations (INR Mn)	2,329	2,761	3,653	505
Sales Growth (Y-O-Y)	4.63%	18.55%	32.31%	-
EBITDA (INR Mn)	195	459	631	104
EBITDA Margins (%)	8.37%	16.62%	17.27%	20.59%
Net Profit (INR Mn)	109	300	407	60
Net Profit Margins (%)	4.68%	10.87%	11.14%	11.88%
Diluted EPS (INR)	3.17	8.15	10.40	1.55
Diluted EPS Growth (Y-O-Y)	37.83%	157.10%	27.61%	-

Key Financial Ratios	FY26
Net Debt to Equity	0.62x
Fixed Asset Turnover Ratio	51.86x
Interest Coverage Ratio	9.81x
Return on Equity	35%
Return on Capital Employed	33%
Debtor Days	138
Working Capital Days	50

Shareholding Pattern



Capital Structure

Share Price as on 25 th August 2026	163
Number of Shares o/s (Mn)	52
Market Capitalisation (INR Mn)	8,525
Add: Debt (INR Mn)	855
Less: Cash & Equivalents (INR Mn)	15
Enterprise Value (INR Mn)	9,365
Networth (INR Mn)	1,360

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