



PIIL:SEC:NSE/BSE:08/2026-27

May 19, 2026

|  |   |
|--|---|
| BSE Limited<br>Corporate Relationship Department<br>PJ Towers, 25 <sup>th</sup> Floor,<br>Dalal Street, Mumbai – 400 001<br><br><b>Code No. 523642</b> | National Stock Exchange of India Ltd.<br>Exchange Plaza, Plot No. C/1, G-Block<br>Bandra Kurla Complex,<br>Bandra (East), Mumbai – 400 051<br><br><b>Code No. PIIND</b> |
|--|---|

Dear Sir/ Madam,

**Sub.: Presentation of Earnings Conference Call pertaining to the Audited Financial Results for the quarter and year ended March 31, 2026**

Pursuant to Regulation 30 read with Part A of Schedule III of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 and in furtherance to our letter dated Tuesday, May 12, 2026 regarding Earnings Conference Call with Analysts / Investors which is scheduled to be held on Wednesday, May 20, 2026 at 03:00 P.M. (IST), we enclose herewith the Presentation of Earnings Conference Call to discuss the Audited Standalone and Consolidated Financial Results for the quarter and year ended March 31, 2026.

This is for your information and records.

Thanking you,

Yours faithfully,  
For **PI Industries Limited**

**Shruti Joshi**  
**Company Secretary and Compliance Officer**

Encl.: As above

Registered Office:

PI Industries Limited

Udaisagar Road, Udaipur - 313001, Rajasthan, India.

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# PI Industries Ltd.



## Investor Presentation

### Q4 FY26 Result

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# Agenda

- 01** Consolidated Financial Performance

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- 02** Key Updates

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- 03** Business Model & Strategy

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- 04** ESG Initiatives

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- 05** Awards & Recognition

# Navigating the Downcycle..... Building the PI's Next Growth Curve

## CONSOLIDATED FINANCIALS

|                         | Revenue      | EBITDA       | PAT*         | INR Mn |
|-------------------------|--------------|--------------|--------------|--------|
| <b>Q4FY26</b>           | 15,652 ▼ 12% | 3,373 ▼ 26%  | 2,002 ▼ 39%  |        |
| <b>FY26</b>             | 67,137 ▼ 16% | 17,053 ▼ 22% | 13,208 ▼ 20% |        |
| <i>FY26 3-year CAGR</i> | ▲ 1%         | ▲ 3%         | ▲ 2%         |        |

**Commercialized 5 new molecules** in Exports and **4 products** in Domestic Agri Brands

Among the **Top 2 percentile of ESG**-rated companies worldwide

**Received Regulatory approval** for launch of a Nematode in US

**Positive traction in Pharma**  
~40% Y-o-Y FY26 revenue growth

**Cash Flow from Operating Activities** in FY26 is INR 4,740 Mn

\*PAT includes exceptional Items

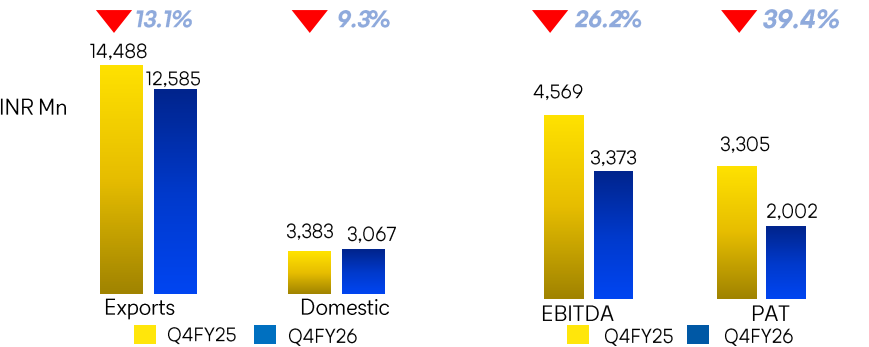


# Q4 Performance Reflects Volatile Global Situation and Customer Delivery Schedule

## ...Continue to Preserve Healthy Margins Amid Challenging Environment

| INR Mn          | Q4 FY25 | Q4 FY26 | % YoY    |
|-----------------|---------|---------|----------|
| Revenue         | 17,871  | 15,652  | (12)%    |
| Gross Margin    | 55%     | 58%     | 277 bps  |
| Overheads       | 5,285   | 5,684   | 8%       |
| EBITDA          | 4,569   | 3,373   | (26)%    |
| EBITDA Margin % | 26%     | 22%     | (40) bps |
| Net Profit      | 3,305   | 2,002   | (39)%    |

- ~15% decline in Agchem Exports due to global agrochemical industry contraction.
- Domestic revenue softened by ~9% Y-o-Y (Volume up ~3%):
  - Market Inventory at elevated levels leading to pricing pressure;
  - Reduction in key crop acreages;
  - Regulatory transitions in Biologicals towards normalization with flat growth in Q4FY26.
- Pharma<sup>1</sup> revenue grew by 23% Y-o-Y. Pharma revenue contributes ~8% of Exports revenue.
- Favorable product mix and cost discipline driving Gross margin improvement.
- Overheads increase comprising strategic development of newer businesses and promotion of new products (4%).
- Increase in ETR due to higher share of business from Non SEZ in Q4FY26. FY26 ETR at ~22%.
- The Board has approved final dividend for FY25-26 of Rs 10 per share (total dividend for FY25-26 of Rs 15 per share including interim dividend).



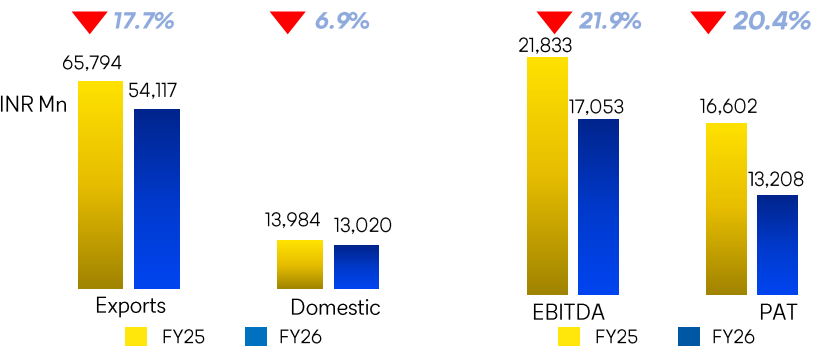
<sup>1</sup>Pharma: PI Health Sciences Ltd. ("PIHSL") Consolidated including overseas subsidiaries



# FY26 Resilient Profitability While Building Future Growth Platforms

| INR Mn                 | FY25          | FY26          | % YoY            |
|------------------------|---------------|---------------|------------------|
| <b>Revenue</b>         | <b>79,778</b> | <b>67,137</b> | <b>(16)%</b>     |
| <b>Gross Margin</b>    | <b>53%</b>    | <b>58%</b>    | <b>507 bps</b>   |
| <b>Overheads</b>       | <b>20,277</b> | <b>21,808</b> | <b>8%</b>        |
| <b>EBITDA</b>          | <b>21,833</b> | <b>17,053</b> | <b>(22)%</b>     |
| <b>EBITDA Margin %</b> | <b>27%</b>    | <b>25%</b>    | <b>(197) bps</b> |
| <b>Net Profit</b>      | <b>16,602</b> | <b>13,208</b> | <b>(20)%</b>     |

- Agchem Exports declined by 19% Y-o-Y (Volume down ~14%) due to high base effect ( Y-o-Y growth: FY23: +26%, FY24: +19%, FY25: +5%),
  - 5 molecules commercialised in FY26;
  - New Products revenue share is 18% of Agchem Exports Revenue.
- Domestic revenue decline by ~7% Y-o-Y (Volume down ~1%) due to adverse weather conditions, lower crop prices, regulatory disruptions in Biologicals and elevated channel inventories.
  - 4 products launched in FY26.
- Pharma<sup>1</sup> revenue grew 40% Y-o-Y and contributing ~6% of total Exports revenue. Pivoted towards bio-tech and mid pharma customers.
- EBITDA margin as per guidance at 25%: Favorable product mix backed by strong operating efficiencies.
- Net Profit for FY26 includes exceptional income on account of writeback of contingent consideration of INR 1260 Mn partially offset by additional provisioning as per New labor code to the tune of INR 229 Mn.



<sup>1</sup>Pharma: PI Health Sciences Ltd. (“PIHSL”) Consolidated including overseas subsidiaries

# Balance Sheet Strength Provides Strategic Flexibility through the Cycle

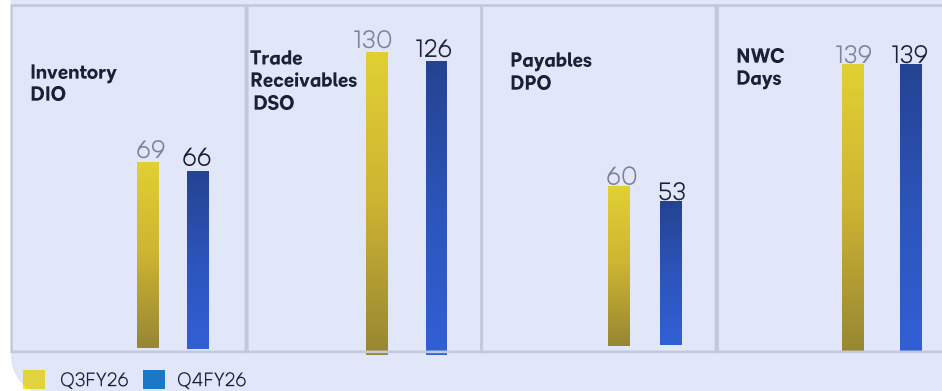
| INR Mn                                 | Mar-25          | Dec-25          | Mar-26          |
|--|-----------------|-----------------|-----------------|
| Shareholders Fund                      | 1,01,570        | 1,11,458        | 1,12,305        |
| Non Current Liabilities                | 3,920           | 3,839           | 4,365           |
| Short term debt                        | 337             | 639             | 893             |
| Other Current Liabilities              | 4,838           | 5,901           | 7,136           |
| <b>Total</b>                           | <b>1,10,665</b> | <b>1,21,837</b> | <b>1,24,699</b> |
| Fixed Asset Inc. Goodwill              | 47,589          | 52,640          | 56,496          |
| Non current investments & other assets | 5,656           | 3,079           | 2,994           |
| Working Capital                        | 16,063          | 26,156          | 25,628          |
| Cash, Bank & Investments               | 37,594          | 35,654          | 35,094          |
| Other assets                           | 3,763           | 4,308           | 4,487           |
| <b>Total</b>                           | <b>1,10,665</b> | <b>1,21,837</b> | <b>1,24,699</b> |

## Key Ratios (%) Annualised

|                               |       |       |       |
|-------------------------------|-------|-------|-------|
| Debt/ Equity Ratio            | 0.01  | 0.02  | 0.02  |
| Net Sales to Net Fixed Assets | 1.90  | 1.47  | 1.33  |
| ROCE <sup>2</sup>             | 28.9% | 20.3% | 18.8% |

<sup>2</sup>ROCE computed excluding Cash, Bank & Investments

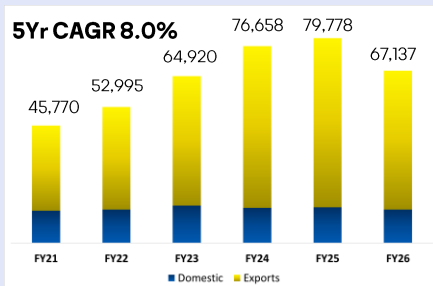
- Surplus cash net of Debt is INR 34,265 Mn enabling the company to pursue future strategic investments for long-term sustainable growth.
- Total capex for FY26 stood at INR 11,508 Mn (FY25: INR 9,280 Mn), reflecting continued investment in manufacturing capabilities to meet future customer requirements and R&D spends for new molecules innovation.
- Trade working capital flat Q-o-Q, increase over Mar-25 due to inventory build-up and calibrated credit extension in line with Agchem market conditions.



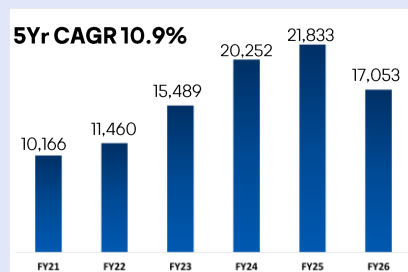
# Long-term Compounding Despite Cyclical Volatility...

Figures in INR Mn except EPS

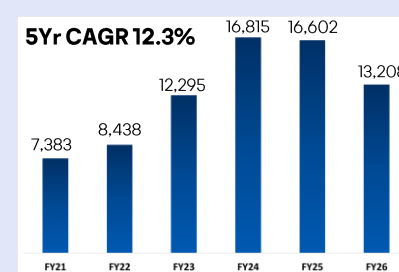
## Revenue



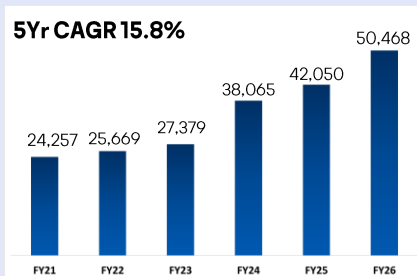
## EBITDA



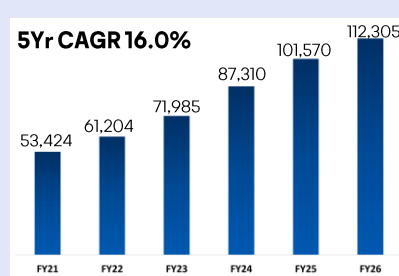
## PAT



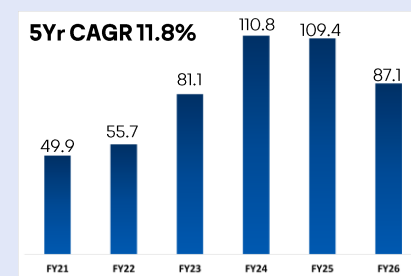
## Fixed Assets



## Net Worth



## EPS





# PI Story: From Distribution Economics to Innovation Led Value Compounding with Partnership Model

Consistent Revenue Growth



Transformation at each stage

**Right to win :** | 
 **Strong Balance sheet** | 
 **Innovation mindset** | 
 **Global partnership** | 
 **Execution excellence**

Reported Revenue CAGR

# Innovation Pipeline Delivering Differentiated, High-Value Crop Solutions...Strengthening Market Position



**Alcor®**

Systemic herbicide for management of ALS resistance weeds



**Comet®**

Post emergent herbicide for control of grasses



**Uranus®**

For Mites control



**Fixit®**

Herbicide for Rice weeds control



**Pressedo®**

Broad spectrum novel insecticide



**Osheen Ultra®**

For sucking pest control



**Solju™ Gr & Solju™ SP**

Unique microbial biofertiliser



**Dorito®**

Broad spectrum insecticide



**BYROCK®**

Fungicide



**Kaprigin®**

Organic Fertiliser



**Vachan™**

Insecticide for Leps management



**Claret®**

Unique combination of systemic and contact insecticide



**Eketsu™**

1<sup>st</sup> 3-way Rice Herbicide



**Kadett®**

Combination Fungicide



**Pilin®**

Bio-fungicide with Novel Mode Of Action



**Aminogrow Activ™**

Amino acid & Peptides product



**Campana™**

New systematic insecticide

HORTICULTURE



SOYBEAN



CHILLI



SUGARCANE



RICE



WHEAT



COTTON



CORN



Crop Solutions

**Robust pipeline of 20+ products at different stages of development and registration**



# Pharma Business Recorded Highest Quarterly Sales for FY26...

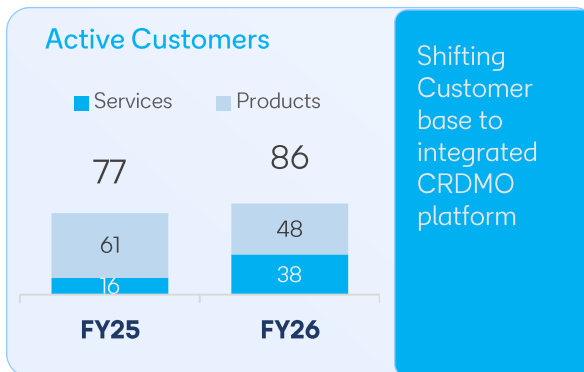
| INR Mn         | Q4FY25       | Q4FY26       | % YOY      |
|----------------|--------------|--------------|------------|
| <b>Revenue</b> | 850          | 1,048        | <b>23%</b> |
| <b>PBT*</b>    | <b>(667)</b> | <b>(300)</b> | <b>55%</b> |

| INR Mn         | FY25           | FY26         | % YOY      |
|----------------|----------------|--------------|------------|
| <b>Revenue</b> | 2,151          | 3,005        | <b>40%</b> |
| <b>PBT*</b>    | <b>(2,494)</b> | <b>(785)</b> | <b>68%</b> |

\* Post intercompany eliminations and includes exceptional items

- Revenue growth mainly driven by on-boarding of new customers over the last 12 months, including several strategic accounts and large pharma customers supporting mid- to long-term growth.
- One-off processing related cost and product mix.
- Higher overheads due to investments in capability building, people and processes.
- Capex spend ~INR 917 Mn (FY25 ~INR 1,275Mn).



## Capability building

Filing for regulatory approval of GMP Kilo facility in Lodi

CoE for drug discovery at Hyderabad CRO facility

State-of-the-art QC lab in Lodi

CADD & ML toolkits for large library screening

Discovery Biology



# Biologicals - From Foundation to Acceleration: Registered, Resourced and Ready

- Launch of Harpinαβ in India
- Bionematocide registration was granted by the EPA in the US
- Upcoming launch of proprietary brands on the east of Rockies for Bionematocide and Biostimulant
- Distribution expansion in Mexico with onboarding of second largest crop protection national Distributor

## Biostimulants

- Seaweed Extract Platform
- Suppression of broad-spectrum diseases and nematodes
- 2<sup>nd</sup> Gen Recombinant Harpinαβ Peptide Platform
- Commercialized in more than 25 Countries



## Soil & Nutrition Solutions

- Microbials and Plant Extracts Platform
- Nutrient Efficiency Brand
- Soil Nutrition Brand



## Biocontrol

- 3<sup>rd</sup> Gen Peptide Platform
- Broad Spectrum Disease and Nematode Management Solutions
- Biocontrol Brands



**Global Biologicals (ex-India) annualized revenue ~ USD 12 Mn with healthy margin upward of 60%, expected to grow in double digits**

|                | Product A       | Product B | Product C |   |
|----------------|-----------------|-----------|-----------|---|
| Commercialized | India           | ●         |           |   |
|                | Brazil          | ●         | ●         | ● |
|                | Mexico          | ●         | ●         | ● |
|                | US              | ●         | ●         | ● |
|                | Southern Europe | ●         | ●         |   |
|                | Rest of Europe  | ●         | ●         |   |

## Technology Platform for Peptides

Derived from natural proteins, Peptide technology is an environmentally friendly technology that stimulates crop growth and the ability to withstand a variety of abiotic stresses as well as to improve disease control, plant health and yield.

# Long-term Outlook Remains Robust through Diversified Growth...

## Continue to make significant investment in new businesses and product launches...



### Domestic:

Focus on portfolio diversification with high quality revenue

- Climatic uncertainty going into Kharif Season to be partially mitigated by higher reservoir levels
- Increase in input costs due to on-going geopolitical tensions leading to pricing pressure
- Growing market adoption of new products is helping sales
- Biological business on revival mode based on regulatory normalization



### Exports:

Technology focused approach to drive incremental business

- 5+ new molecules to be launched in FY27, expected to accelerate growth
- Cautious optimism for H2FY27 on the back of committed customer offtake plans
- Strong order book continues to support growth outlook for FY27
- Continuing strategic investments in differentiated technologies



### Health Science:

Building a differentiated play in Pharma CRDMO space

- Positive momentum in Pharma through new strategic partnerships entered in last 12 months
- Improved business development and R&D pipeline visibility over the next 1-2 years
- Expanding and enhancing GMP site in Lodi, Italy; Non GMP sites in India



Progressing on strategic initiatives in line with plan

- Commercialization of PI's own NCE to be launched in FY27; additional leads progressing well with partnership model
- Robust global pipeline of Biological products across various development stages
- Inorganic growth opportunities under evaluation to complement the growth in long-run

**..we remain positive for growth in FY27...**

# Reimagining a Healthier Planet

“Leading with science, technology and human ingenuity to create transformative solutions in life sciences”



## COURAGEOUS

Think **Bold**, act with **Integrity** and be **Accountable**.



## CURIOS

**Question** conventional wisdom, be **Open-minded, Adaptable and Curious**.



## CREATIVE

**Differentiate, Collaborate, Experiment** and **Execute ideas at speed**.



## CARING

Be **Transparent**, build **Trust**, bring the best out of **People** and embrace **Sustainability**.



## PARTNER CENTRIC

First to identify and deliver on latent needs of our customers and partners



## SCIENCE & TECH DRIVEN

Sustainable solutions by early adoption of cutting-edge science & technologies



## DIGITAL EDGE

Integrated digital solutions to gain competitive advantage



## PEOPLE FIRST

Best opportunities for employees to learn and grow



## ESG ANCHORED

ESG as a way of life



# PI: Trusted, Resilient and Future-Ready



An organization that is committed to excellence in whatever it does . . .

known for over 2 decades to be the Top wealth creator . . .

## A Trusted Brand & Partnerships

- **5+ decades** with Global innovators
- **Zero conflicts** till date

## Successful Product Brands & Services

- **Top 5** worldwide in AgChem CSM
- **70% +** revenue from proprietary products

## Science & Technology

- **Fully integrated R&D** across all disciplines under one roof
- **Rapid tech adoption**

## ESG Anchored



- ESG, the **way of life**
- Featured in the **S&P Global Sustainability Yearbook 2026**

## Addressing Emerging Opportunities

- Never a “me-too” player
- New frontiers Agri | Horticulture | Biologicals | Health Sciences

# Partnering Across the Ag-chem Value Chain

Non conflicting business model ... well respected by Global Innovators as Partner



# World-class R&D set-up delivering innovative and disruptive solutions

State-of-the-art  
R&D Labs  
at **4 locations**

NABL ISO17025 and GLP certified  
**New ICP-OES**  
Addition of **UPLC-CAD**  
(Charged Aerosol Detector)

**700+ Scientists incl.**  
**200+** Doctorates



**90+ projects** at different  
development stages

**250+ Patents** till  
date with 43  
patents in FY26

**In-house library** with a  
vast array of knowledge  
resources



## 1<sup>st</sup> Indian company to innovate **"PIOXANILIPROLE"** Now filed for registration



# Consistent Pipeline growing across years...

## Differentiated CSM Model



**20+ molecules** have been commercialized over the last few years



**90+ molecules** are currently in active pipeline with **> 60%** in advanced stages of development



Ramp-up in Pipeline from **Diversified Segments.**  
**Non-Agchem's** share in new enquiries has increased from **~15% (FY20)** to **~40%+ (FY26)**

## AgChem continues to Grow; Diversifying Portfolio with new segments like Electronic & Specialty Chemicals..



# Agchem CSM, a global leader, backed by strong technological strengths



**Technology pioneer** with technological and IP based interventions in global contract manufacturing



**15 Fully automated Multipurpose Plants (MPPs)** with Distributed Control System (DCS) spread across 5 locations



**Product portfolio consists of early stage molecules** with continued thrust to adapt sustainable practices



**Extensive experience in handling Hazardous Chemistry** with over 130 unit processes

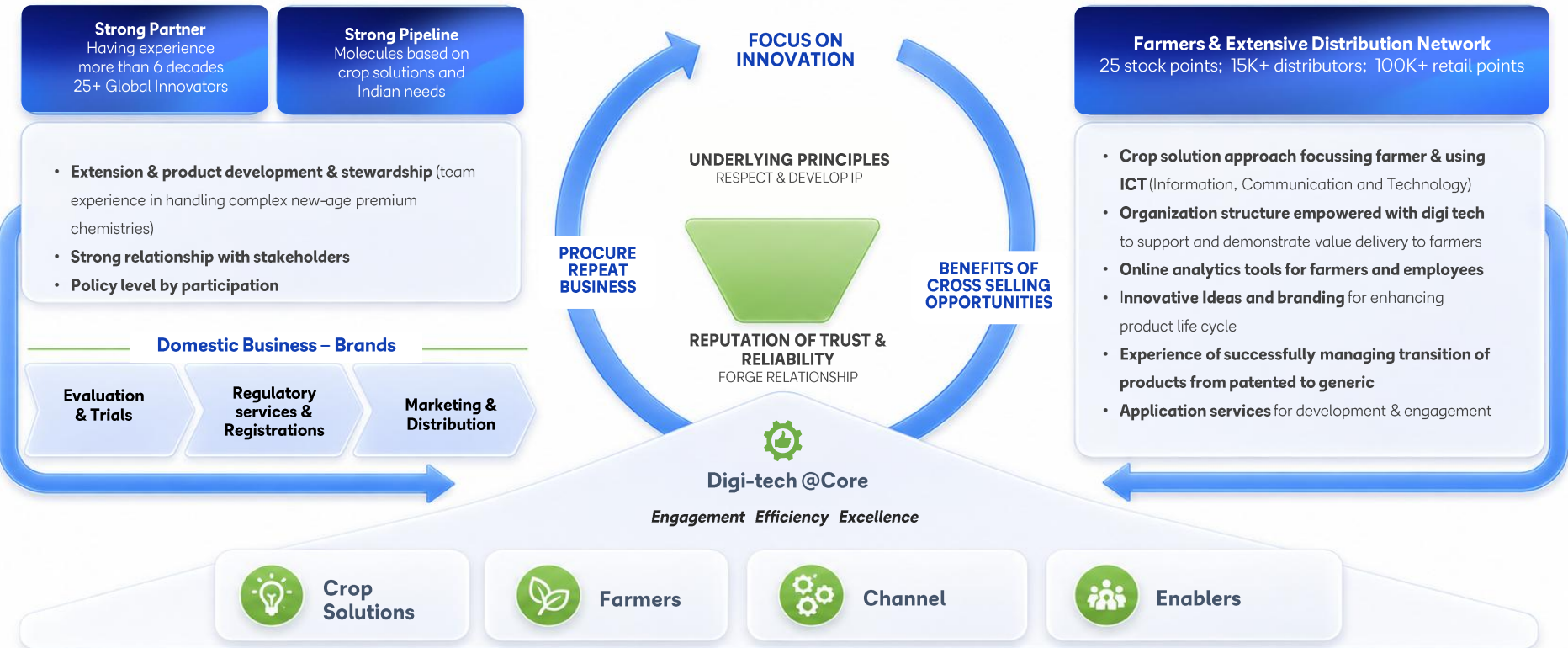


**Capital expenditure underway** as per plan with 3 MPPs under construction



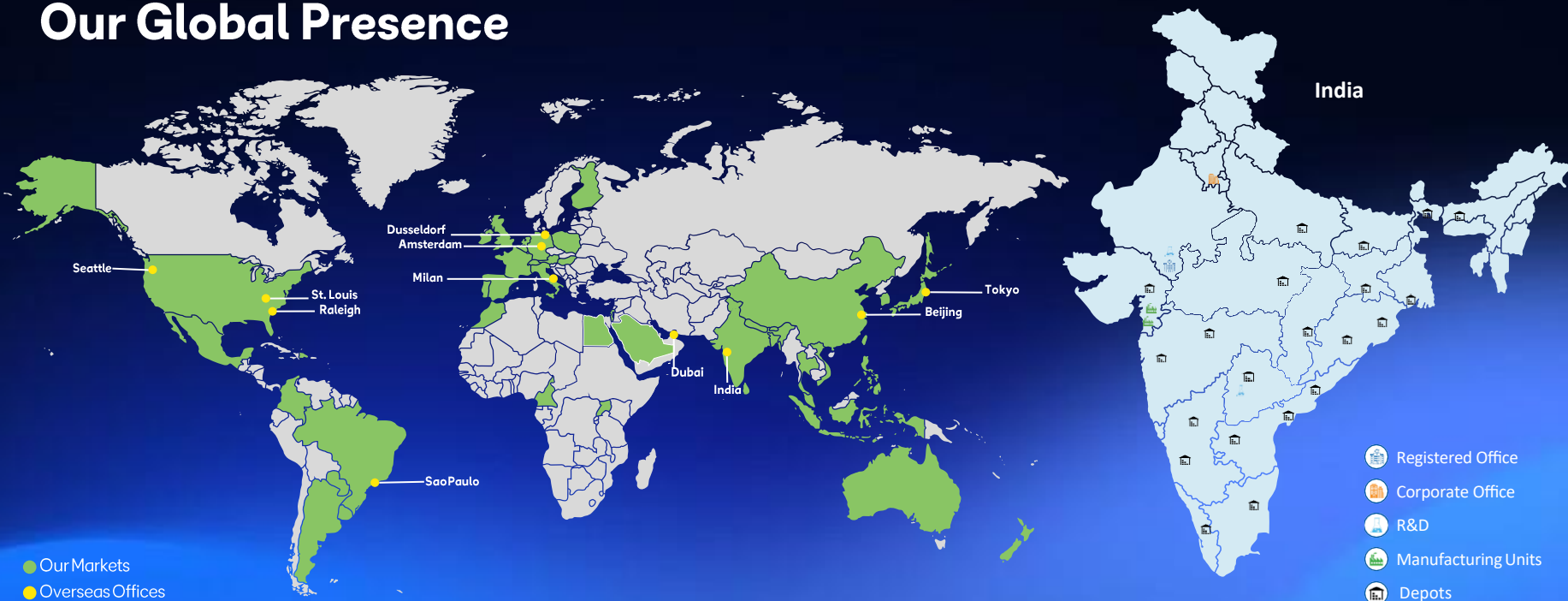
# Differentiated Domestic Distribution Model

Driven By Unique Solutions through Global Partnerships, Brands Building Capabilities And Market Reach



**More than 6 decades creating market-leading brands**  
**Significant revenue from Brands ranked No. 1 or 2 in the market, some brands are more than a decade old**

# Our Global Presence



● Our Markets  
● Overseas Offices

- Registered Office
- Corporate Office
- R&D
- Manufacturing Units
- Depots

|                         |                                  |                            |  |                        |                           |                                |                                  |
|-------------------------|----------------------------------|----------------------------|--|------------------------|---------------------------|--------------------------------|----------------------------------|
| <b>40+</b><br>Countries | <b>10</b><br>Overseas<br>Offices | <b>4,000+</b><br>Employees | <b>2,000+</b><br>Contracted<br>employees | <b>8</b><br>Mfg. Sites | <b>25</b><br>Stock Points | <b>15,000+</b><br>Distributors | <b>100,000+</b><br>Retail Points |
|-------------------------|----------------------------------|----------------------------|--|------------------------|---------------------------|--------------------------------|----------------------------------|

Strong understanding of international work culture with 60+ years of deep-rooted relationships

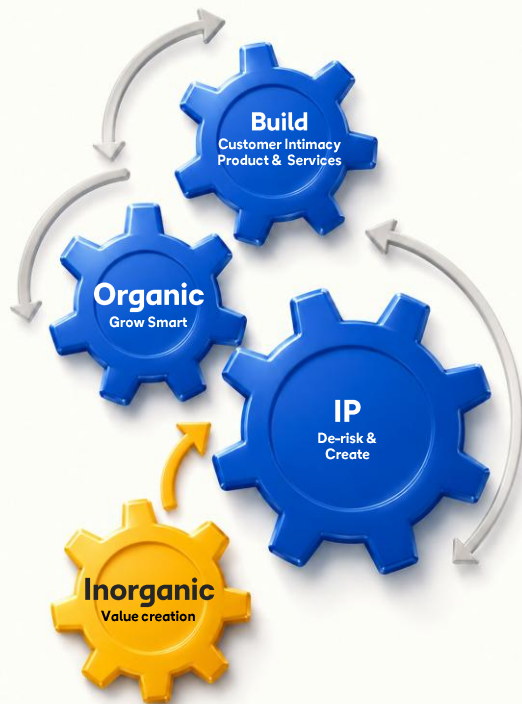
# Multipronged strategy to sustain the growth momentum backed by multiple growth engines & M&A

## Market

- Expansion
- Creation
- Segments
- Operational Excellence
- Brands

## Inorganic

- Disruptive Value-added Technologies
- Product Assets
- Niche verticals within Pharma/ Specialty chemicals
- High growth application areas having synergy



## Deepening our technological capabilities to open new horizons

### De-risk Process Digital

- |   |  |   |
|---|--|---|
| <ul style="list-style-type: none"> <li>• Manufacturing concentration</li> <li>• New formulation of existing products</li> <li>• Biological</li> </ul> | <ul style="list-style-type: none"> <li>• Chemistry</li> <li>• Block Builders</li> <li>• Process engineering</li> <li>• Flow</li> </ul> | <ul style="list-style-type: none"> <li>• Information integration</li> <li>• Decision tools</li> </ul> |
|---|--|---|

## Multiple Growth Engines / Levers

- Research and process innovation with global partnerships
- Marketing & Distribution - Product Pipeline
- Biologicals Platforms
- PI Health Sciences - CRDMO



Prudent capital allocation to ensure the long-term shareholder value creation



# The PI Investment Case: A Proven Growth Engine... Unlocking the Next Era of Growth

## Demonstrated ability to constantly reinvent itself over 8 Decades

Guided by our Values

## Constantly Differentiating our Business to create Moats with Excellence

from Ag distribution to CSM to Innovation in Ag; now to Life Sciences

## Demonstrated Wealth Creation with Strong Financials

Debt free balance sheet, War chest of growth capital

## Unique Business Model and Strong Global Relationships

with Partners from Innovation to Markets

## World-class Integrated R&D capabilities

from discovery to markets: Science & Technology, our Passion

## Digital Edge

From Assets to knowledge, to offer consistency with speed

## People First

Constantly building, acquiring and growing our Human Talent globally

## ESG, a Way of Life at PI

Top 2% ESG-rated globally, 3<sup>rd</sup> consecutive year of S&P CSA yearbook



# Embedding sustainability into long-term value creation

## Environmental

### SDG Alignment

|  |   |
|--|---|
|  | Environment – Climate change            |
|  | Environment – Climate change            |
|  | Environment – Energy management         |
|  | Environment – Water management          |
|  | Lost Time Injury Frequency Rate (LTIFR) |

### Key Highlights\*

|   |
|---|
| Reduced CO <sub>2</sub> emission intensity by <b>25%+</b> from FY21               |
| Reduced Chemical Oxygen Demand by <b>~52%</b> from FY21                           |
| <b>~10%</b> renewable energy as a share of total electricity consumption vs. FY21 |
| Reduced Water intensity by <b>~43%</b> from FY21                                  |
| <b>0.11</b> for all employees and workers<br><b>0</b> for contractual workers     |

\* As on 31-Mar-26

## Social and Governance

### Key Highlights\*

- Increased employees' average training hours per FTE by **53%** from FY21
- Increased women's participation in leadership positions by **50%** from FY21
- 35,000+** acres brought under sustainable agricultural practices by educating farmers about climate-resilient agricultural practices in FY26
- 70%** of enrolled youth placed through skill development initiatives
- 526,000+** healthcare beneficiaries through Mobile Health units and **157,000+** students impacted through various initiatives since FY21

Featured in the S&P Global Sustainability Yearbook for 3<sup>rd</sup> consecutive year  
PI Industries Limited has been included in the Dow Jones Best in Class (DJ BIC) Indices for Emerging Markets



|       |             |             |
|-------|-------------|-------------|
| Score | <b>2024</b> | <b>2025</b> |
|       | 68          | 77          |

- PI ranks among the **Top 25 companies globally** in the chemical sector and is one of only three Indian chemical companies to be included in the 2025 Yearbook.
- For the 2025 edition, more than 8,551 companies were assessed, and only 540 companies secured a place in the Yearbook, including 32 from India. PI Industries is proud to be among the **Top 2 percentile of ESG-rated companies worldwide.**
- It is based on the S&P Global Corporate Sustainability Assessment (CSA), an independent and rigorous evaluation covering over **13,000** companies globally.

Carbon emissions intensity in terms of revenue from operations (INR million)



Water intensity in terms of revenue from operations (INR million)



Chemical Oxygen Demand (in MT)



# Our commitment to Community...



## HEALTH & HYGIENE

**66** villages, Shvasta Seva

**89,000+** beneficiaries in FY26

**60+** children supported, congenital heart care



## WOMEN EMPOWERMENT

**80** rural villages active

**6,500+** women benefited

**~25%** income increase via programs



## EDUCATION & SKILL DEVELOPMENT

**135** schools with digital learning

**7,000+** students supported

**2,400+** youth trained

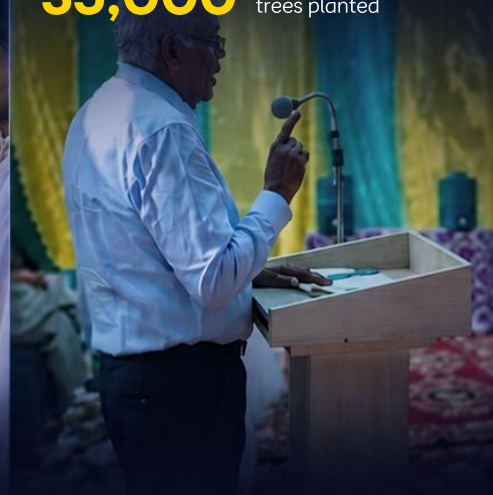


## ENVIRONMENT SUSTAINABILITY

**44,000+** farmers reached

**35,000+** acres covered

**35,000** trees planted



Building strong, healthy communities across India through targeted CSR programs

# Recognition Reinforces Leadership, Safety & Governance Excellence



**Gold Trophy - NSCI Safety Award 2024 for Excellence in Occupational Safety & Health**



**4<sup>th</sup> EDITION Most Preferred Workplace 2025-26**  
by Marksmen Daily



**India's Top Value Creator 2025**  
Agro Chemicals by Dun & Bradstreet



**British Safety Council Sword of Honour - Udaipur Site, October 2025**



PI Industries receives the **Business Leader of the Year - ESG Award** from Chemtech Leadership & Excellence Awards 2026

# Thank You