

May 09, 2026

To
The Compliance Manager
BSE Limited
Corporate Relationship Dept.,
Phiroze Jeejeebhoy Towers,
Dalal Street, Mumbai 400001.

Scrip Code: 544419

To
The Manager, Listing Department
National Stock Exchange of India Ltd
Exchange Plaza, Plot No. C/1, G Block,
Bandra-Kurla Complex, Bandra (East),
Mumbai 400 051.

Symbol: ARIS

Sub: Investor Presentation

Dear Sir/ Madam,

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations 2015, we are enclosing herewith the Investor Presentation, that will be presented on Monday, May 11, 2026 to the Analysts in connection with the Standalone and Consolidated Audited Financial Results of the Company for the Quarter and Financial year ended March 31, 2026.

The same is also available on the Company's website at <https://aris.in/pages/investor-relations-financial-results>

You are requested to take the above information on record.

Thanking you,

Yours sincerely,

For Arisinfra Solutions Limited,

Bhavik Jayesh Khara
Whole Time Director & CFO
DIN: 09095925

Place: Mumbai
Encl.: As mentioned above

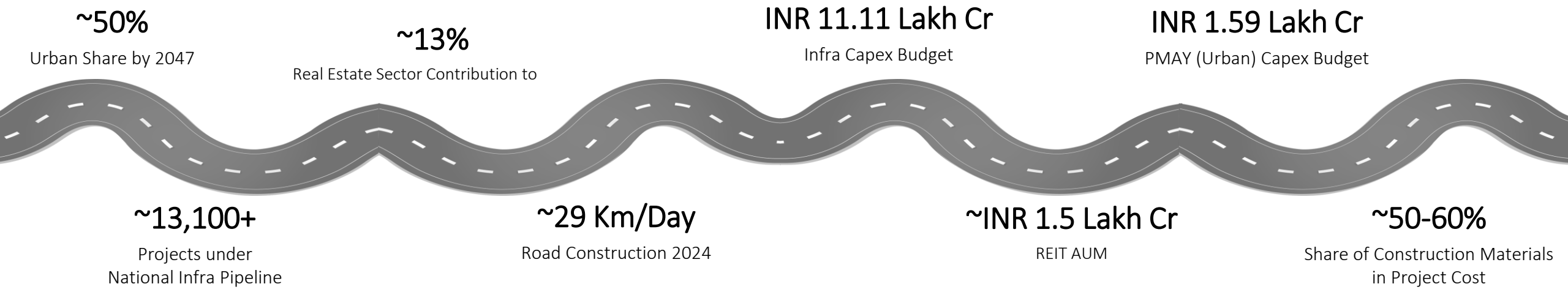


INVESTOR PRESENTATION

MAY 2026



Dynamics of Indian Construction Materials Market

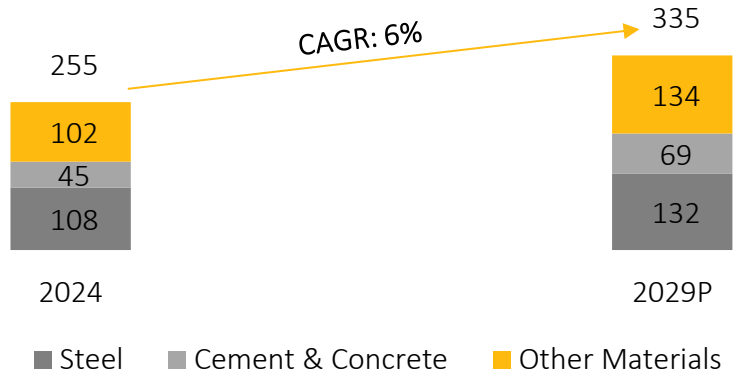


Growth Drivers:

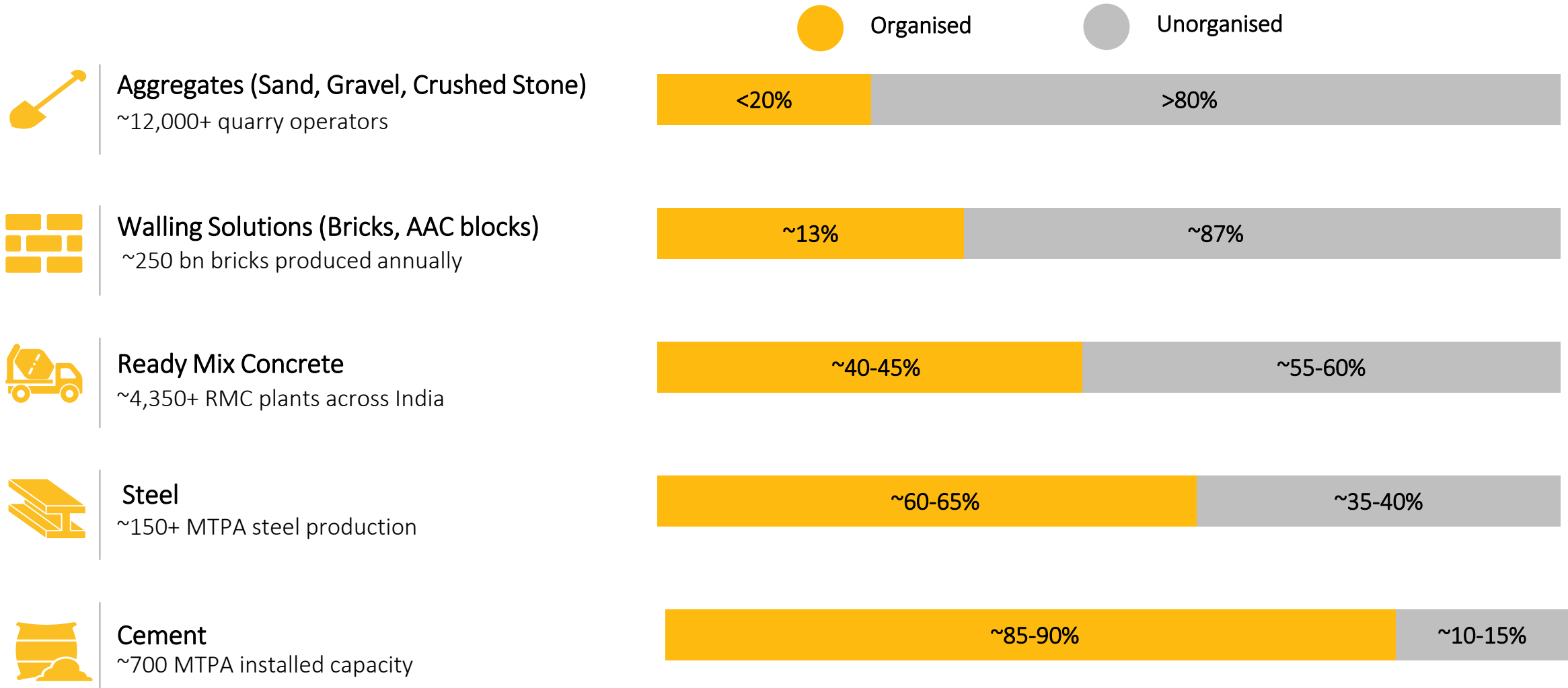
- RERA mandating project disclosures and completion timelines.
- GST simplifying taxation and formalizing the business ecosystem.
- Government-Led Infrastructure Expansion under National Infra Pipeline
- 'Housing for All' under PMAY driving residential construction demand.
- Urban Infrastructure Fund accelerating Tier 2 & Tier 3 city growth.
- Digital adoption in construction materials market is still in early stages.

Source: Redseer research and analysis

Indian Construction Material Market (USD Bn)



Fragmented Structure of India's Construction Materials Industry



A fragmented supply ecosystem creates a large platform opportunity for ArisInfra to digitize and organize construction procurement.

Source: Indian cement review, beeindia, rentechdigital, IBEF, cmaindia, marketreportanalytics, company estimates

No technology. No organisation. No operating layer. The opportunity is entirely open.

01

1 Mn+ fragmented vendors

No single source. No price transparency. Every project renegotiates from scratch. Margins vanish at every handoff.

02

Broken working capital

Contractors pay upfront, developers pay late. The gap between cash out and cash in destroys otherwise healthy businesses.

03

Zero technology layer

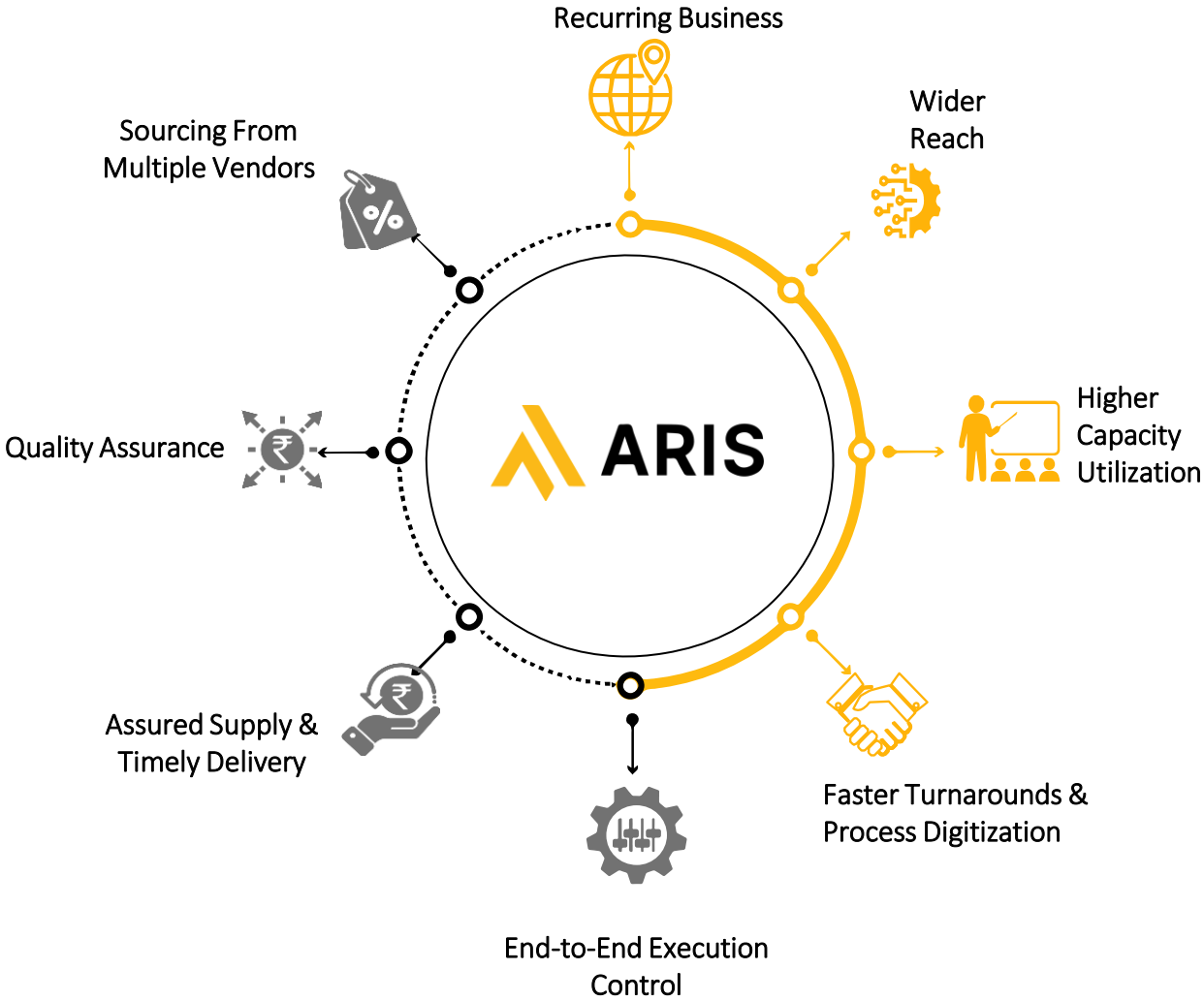
Paper trails. Manual reconciliation. No real-time visibility. Every delivery a manual event. Every invoice a potential dispute.

04

Real estate execution gap

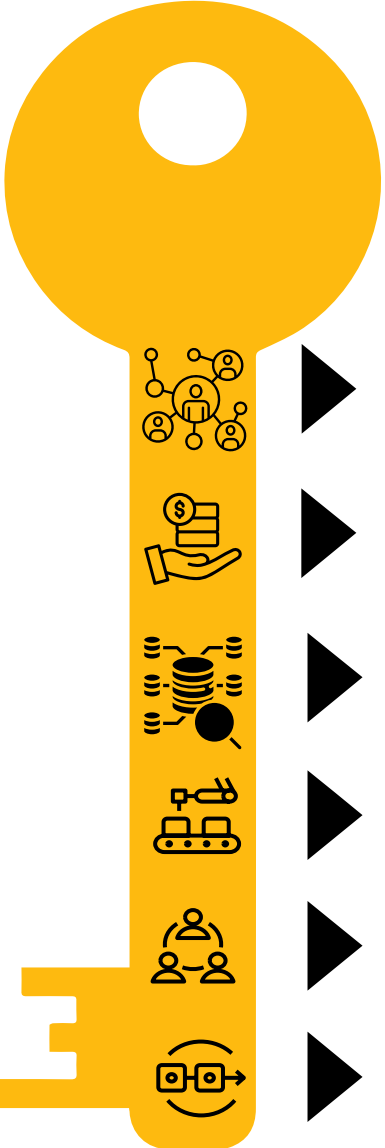
Landowners, developers, and funds lack capable operating partners. Projects stall, capital gets trapped, timelines slip. The execution layer is missing.

Every one of these is a network problem. ARIS built the network and the intelligence that runs it.



Customer Value Proposition

Vendor Value Proposition



- ▶ **Network Effects Compound:** More vendors, better prices. More clients, stronger terms. More data, smarter decisions.
- ▶ **Self Funding Network:** High-margin service segment with near-zero working capital enables the business to fund its own growth without external capital.
- ▶ **Difficult to Replicate:** Built on 4+ years of transaction data, exclusive plant partnerships, and 5,000+ counterparties where every new node increases network value.
- ▶ **Digital Procurement Platform:** End-to-end digitized sourcing, pricing & documentation.
- ▶ **Asset-Light Expansion Model:** No heavy capex or inventory ownership.
- ▶ **Execution-Led Operating Model:** Controls sourcing, quality & delivery.



COMPANY OVERVIEW



23

States & UTs



1,100+

Pincodes Served



3,200+

Customers Catered



2,100+

Sourcing Vendors



10+

Contract
Manufacturing Plants



9 Mn+

MTPA
Reserved Capacity



26+

MMT
Materials Delivered



800+

Daily Deliveries



78%

Repeat Orders



2 Mn Sq. Ft.

Services Portfolio
Under Execution



66 Days

Net Working Capital
Days



(0.09)x

Net Debt to Equity



13%

3 Year Revenue CAGR



12%

ROE



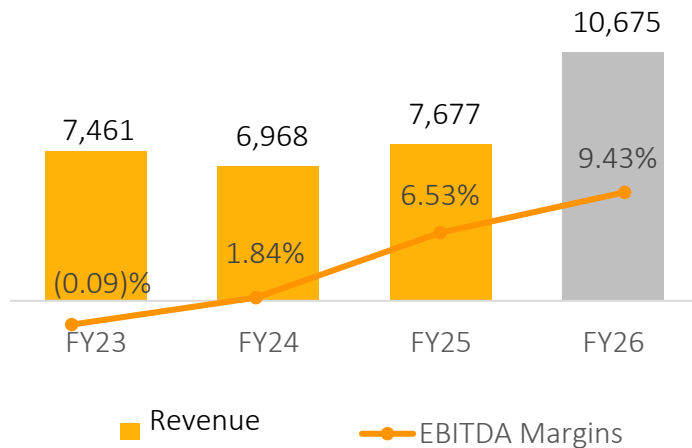
21%

ROCE

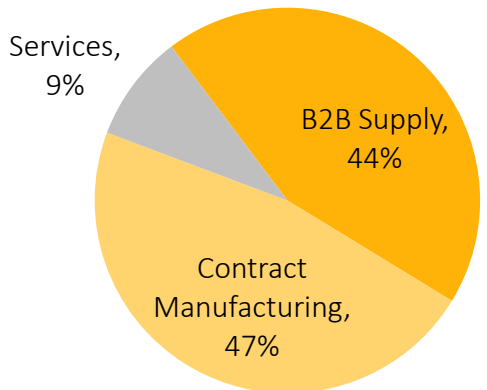
All Figures as of FY26

- 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 with no inventory risk and minimal fixed assets.
- It integrates sourcing, quality control, logistics, and documentation into a unified digital supply-chain network.
- Serving leading infrastructure and real estate developers, backed by a 3,200+ strong client base and ~78% repeat order rate, reflecting high customer stickiness and execution trust.
- Offering a diversified portfolio including aggregates, RMC, steel, cement, construction chemicals, asphalt, and value-added services.
- Operating a 2,100+ vendor network with pan-India reach, enabling seamless delivery across thousands of project locations.
- Its scalable, capacity-reservation model enables efficient growth without heavy capital deployment.
- The company combines on-ground execution with backend intelligence to improve transparency and reduce procurement inefficiencies.

Revenue (INR Mn) & EBITDA Margin (%)



FY26 Segmental Revenue Mix (%)





The company was originally incorporated as a private limited company under the name Arisinfra Solutions Private Limited on February 10, 2021, in Mumbai, Maharashtra. The founders aimed to create a "digital orchestration layer" for the construction sector, replacing traditional offline procurement with a tech-enabled B2B platform.



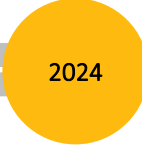
Delivered 2 million+ metric tonnes of construction materials in a period of 12 months ended March 31, 2022 Introduced 'ArisFlow' on a pilot basis, to automate and simplify deal closure.



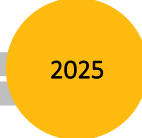
Expanded our footprint into major cities across North and South India, including Bangalore, Nashik, Noida, and Ranchi, broadening our offering of construction materials. Launched AAC Blocks distributed to regular transacting customers. Introduced 'ArisDelivery' to optimize delivery operations Launched a data assisted AI agent in March for real-time data access and comprehensive business analysis from a messaging app integrated with our technology.



The company had scaled its operations to serve customers across more than 18 states in India, utilizing an asset-light model that avoided the need for heavy capital expenditure on manufacturing plants. By the end of FY24, the company reached a revenue of INR 702 crores and delivered over 10 million metric tonnes of material.



The company filed its Prospectus in June 2025 for an IPO of approximately INR 500 crores. The issue was a 100% book-built process, and the company was listed on both the BSE and the NSE. The company introduced several industry-first digital features, including a Live RFQ (Request for Quote) facility and an AI-driven credit assessment tool known as "Cara AI". In late 2025, the company announced its entry into the large-scale asphalt market.





Ronak Morbia
(Chairman and Managing Director)

Co-founder with 20 year's experience scaling construction and infrastructure supply networks; led growth into a tech-enabled execution platform.



Bhavik Khara
(Whole-Time Director and Chief Financial Officer)

Co-founder and Rutgers Business School graduate; leads financial strategy, governance, and capital allocation at Arisinfra, driving discipline and scalable growth.



Siddharth Shah
(Vice Chairman and Non-Executive Director)

Promoter, an engineer from DJ Sanghvi and IIM Ahmedabad PGDM, he is MD & CEO of API Holdings, FICCI E-Commerce Chair (2024), with 8+ years in healthcare leadership.



Ramakant Sharma
(Independent Director)

Founder & CEO of Livspace, he is an IIT Kanpur and ISB alumnus with strong startup and operational experience, including engineering leadership at Myntra and founding Violetbag.com.



Gitanjali Mirchandani
(Independent Director)

A seasoned real estate investment professional, she was Managing Director & Head of Origination at JM Financial, with deep expertise in strategic investments and corporate governance.



Renganathan Bashyam
(Independent Director)

A seasoned corporate law professional with over 33 years of experience, he brings deep expertise in investment banking, corporate governance, NBFCs, M&A, issue management, and regulatory compliance.



**Srinivasan
Gopalan**

(Chief Executive Officer)

Srinivasan leads business development, customer relationships, and credit strategy, leveraging 20+ years in real estate and finance to drive disciplined growth.



**Latesh
Shah**

(Company Secretary and
Compliance Officer)

Latesh leads governance, compliance, and regulatory matters, supporting the Board in maintaining strong corporate governance standards.



**Jitender
Sharan**

(CTO and Head of Product)

Jitender heads the company's technology platform and, with prior experience at Walmart, drives digital efficiency, scalability, and competitive advantage.



**Onkar
Chatteraj**

(Senior Vice President - Business
Growth & Partnerships)

Onkar leads business expansion and strategic partnerships, working with developers, contractors, and vendors to strengthen relationships and drive market growth.



**Divya
Iyer**

(Vice President - Business
Operations)

Divya leads operations, customer engagement, and collections, ensuring seamless execution while driving financial discipline and customer trust.



**Suvesh
Sinha**

(Vice President - Strategy
& Credit Risk)

Suvesh drives strategy and oversees credit risk, balancing capital efficiency with growth to enable sustainable expansion.



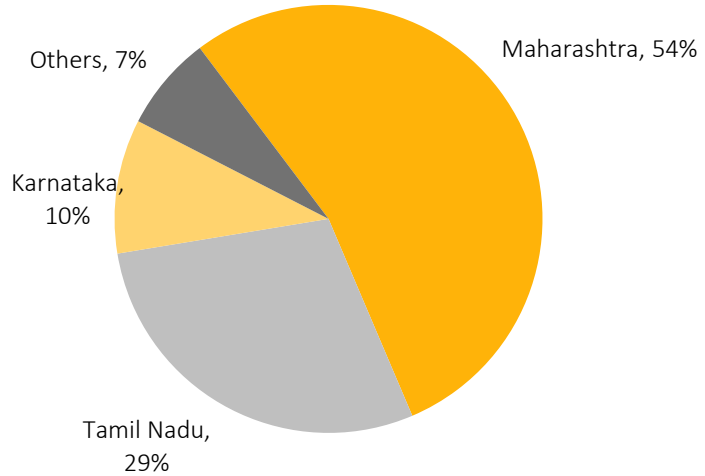
Extensive Operational Footprint

23
States & UTs

1,100+
Pincodes

10+
Contract
Manufacturing
Plants

FY26 Geographical Revenue Mix (%)



Infrastructure Players



Real Estate Developers



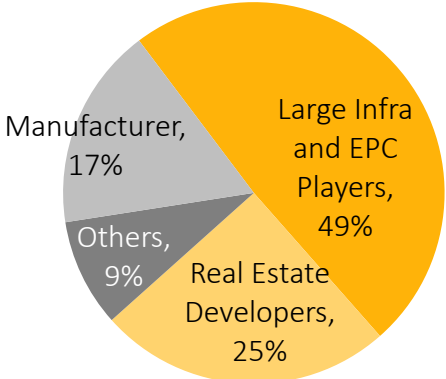
Clients Served Through Advisory & Consultancy Services



3,000+
Customers

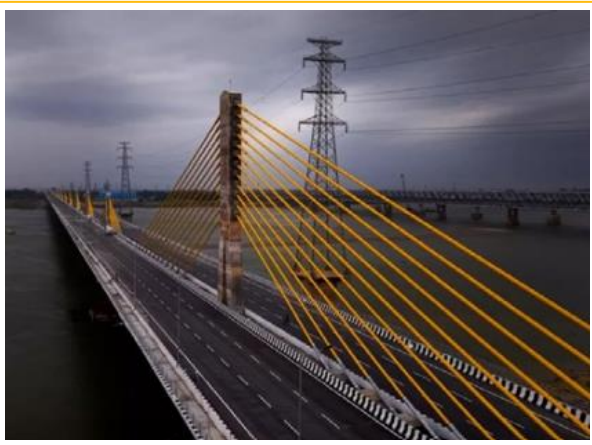
78%
Repeat Customers Count

FY26 Industry Wise Revenue Mix (%)





Chennai Peripheral Ring Road
[Aggregate supply]



Ganga Six Lane Bridge, Bihar
[Aggregate supply]



Listed Developer Project, Whitefield Bangalore [Aggregate Supply]



Mumbai Ahmedabad Bullet Train
[Chemicals & Aggregate Supply]



Navi Mumbai Airport
[Chemicals supply]



Branded Developer Project, Chennai
[RMC supply]



Chennai Metro
[RMC supply]



Warehousing in Chennai
[RMC supply]

BUSINESS OVERVIEW



STREAM 01

B2B Supply

The network's entry point

EBITDA 2–2.5%	Revenue 44%
---------------	-------------

WHAT IT IS

Direct supply of construction materials to contractors, developers, and project sites.

WHY IT MATTERS

High-volume, relationship-intensive. Every trade client deepens network density — more transactions, more data, more pricing intelligence.

→ Feeds into — Trade clients convert to higher-margin exclusive supply.

STREAM 02

Contract Manufacturing

The network's supply engine

EBITDA 9–9.5%	Revenue 47%
---------------	-------------

WHAT IT IS

ARIS secures 100% of output from partner plants under exclusive long-term agreements. Full plant economics. Zero fixed assets.

WHY IT MATTERS

9 mn+ MT locked. Exclusive. Competitors cannot access this capacity. Every rupee of growth compounds ROCE — capital is never tied to equipment.

→ Feeds into — Manufacturers anchor exclusive DaaS materials supply.

STREAM 03

Developer-as-a-Service

The network's highest-yield output

EBITDA 55–60%	Revenue 9%
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WHAT IT IS

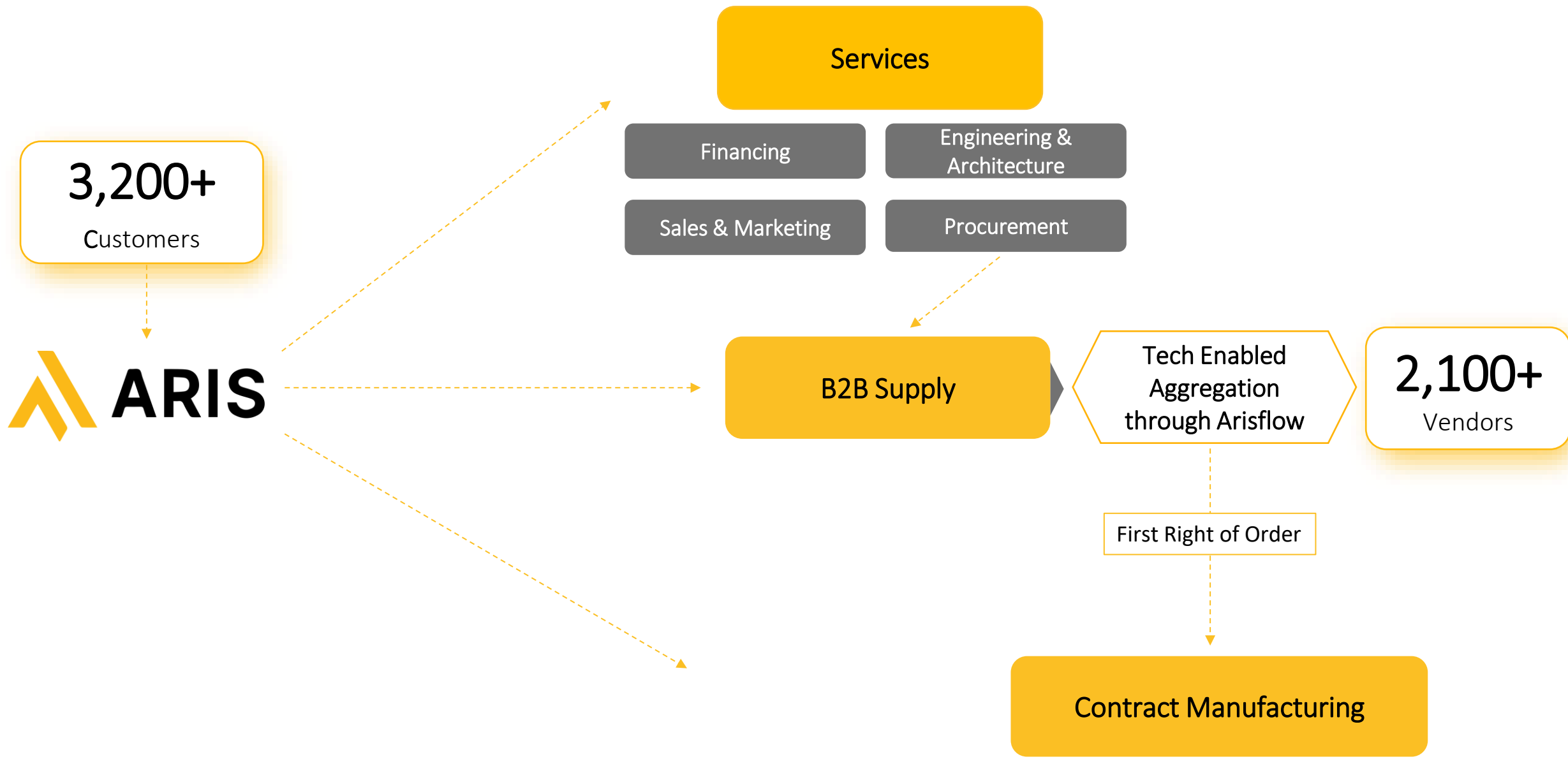
ARIS takes full ownership of real estate projects — development management, construction, sales execution, and client handover.

WHY IT MATTERS

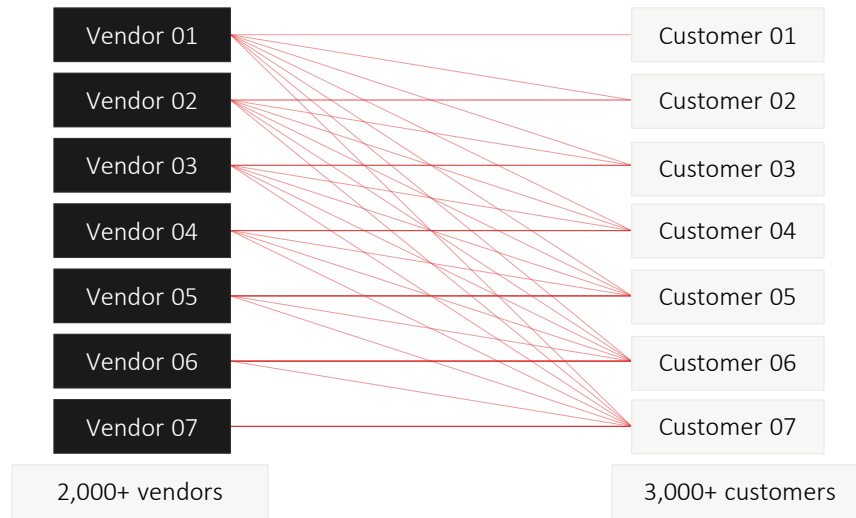
Zero incremental capital. Works across new developments, landowner JVs, and capital-unlock situations. Every DaaS client is an exclusive materials client — one relationship, two revenue streams.

→ Feeds into — Each project adds contractors and vendors to the network.

THE NETWORK — ARIS OS	Price Intelligence Real-time, 1,000+ SKUs	Delivery Automation 1L+ records · AI-enabled	Credit & Risk Engine Live limits, all counterparties	WC Engine 66-day NWC · self-funded
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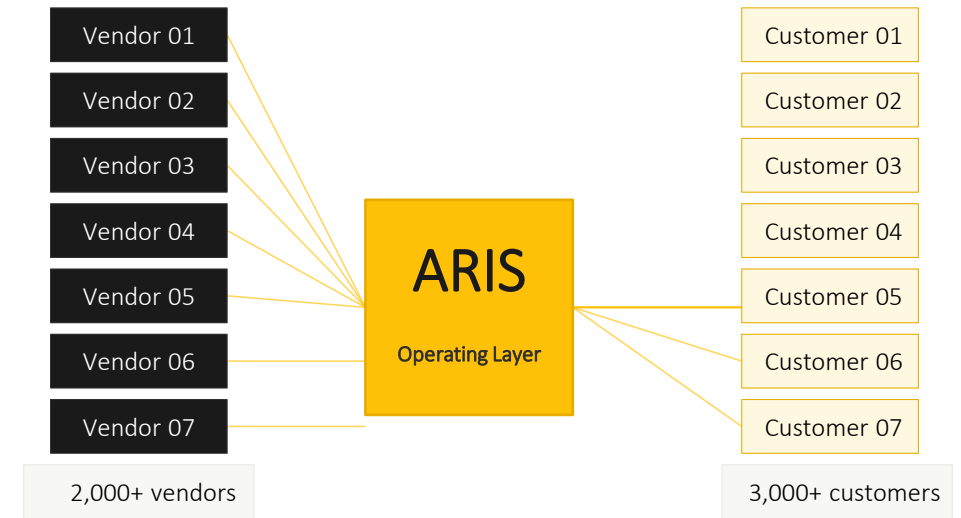
WITHOUT AN OPERATING LAYER



- Reach physically limited to 2-4 local vendors
- Single Vendor for all items
- No pricing visibility across the network
- Verbal offers resulting in days wasted on T&C confusion
- Inaccuracy in deliveries, paperwork and billing
- Credit risk invisible until it becomes a crisis

VS

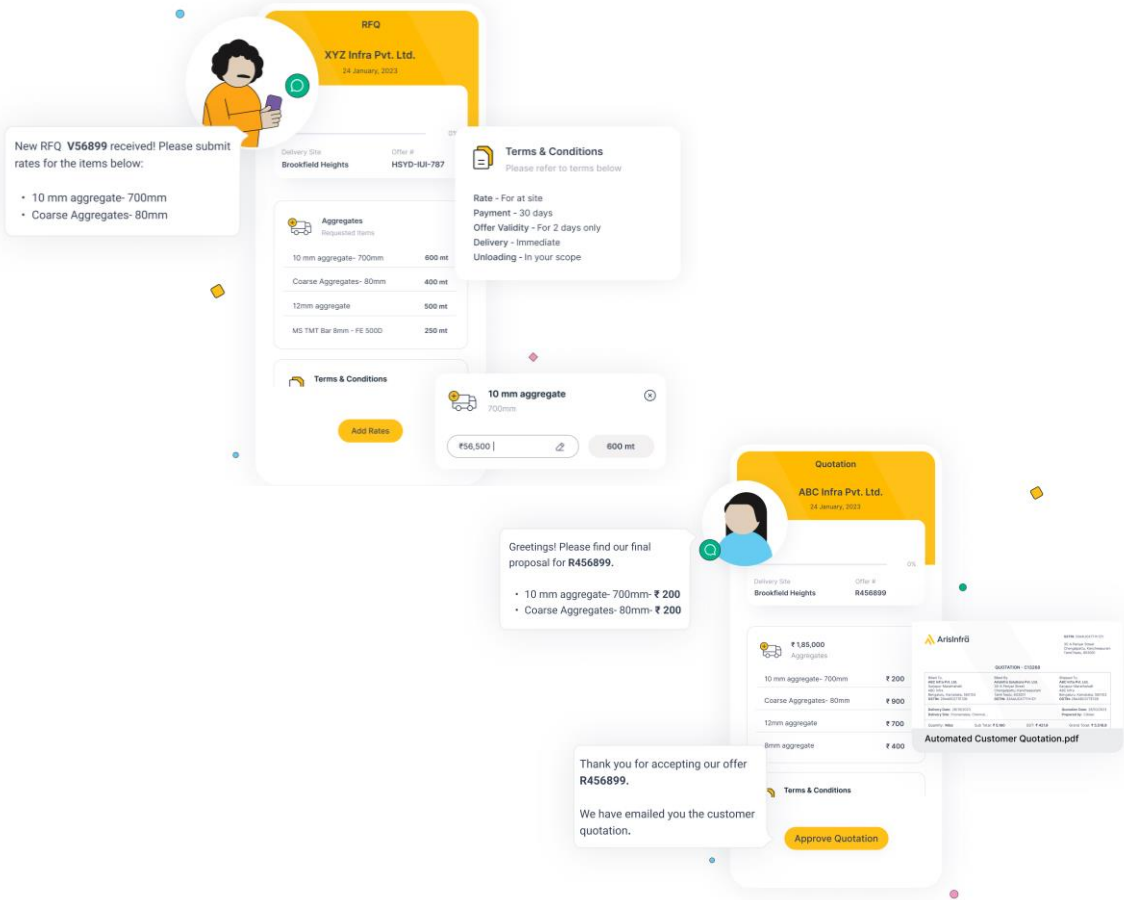
WITH ARIS AS THE OPERATING LAYER



- 100+ vetted vendors evaluated instantly via algorithm
- Optimal Multi-vendor orders finalized
- Price intelligence across every transaction
- Offers are finalized in 15 mins
- Every dispute has a complete audit trail
- Credit monitored in real time across all counterparties

ARIS is rewiring a fragmented ecosystem into a scalable, transparent, accurate and digital network.

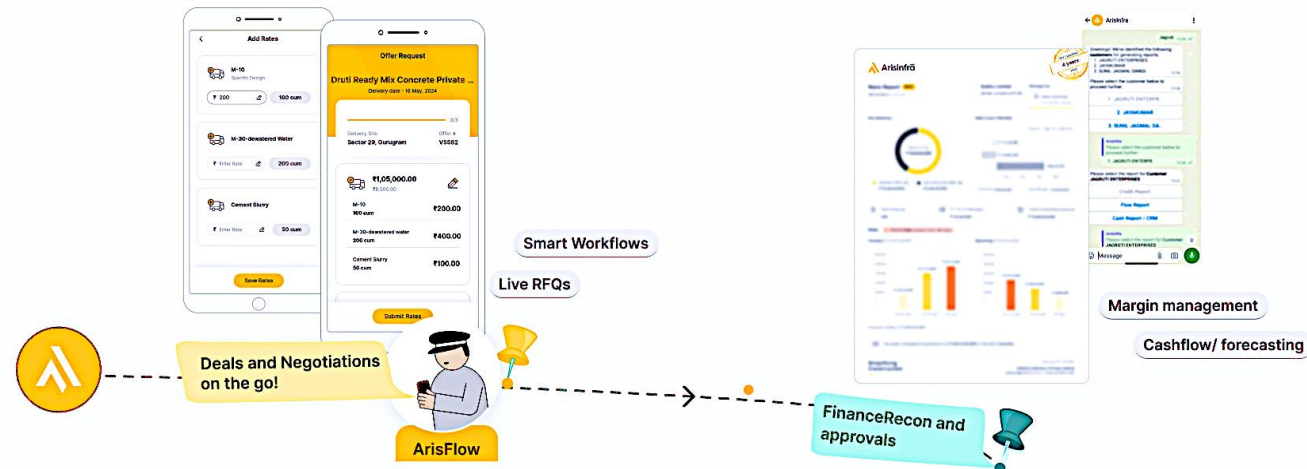
	Without Aris	Aris Difference
RFQs	15 Days	🟡 Live
Vendor Onboarding	5 Days	⚡ 10 Mins
Order to PO	3+ Hours	⚡ 7 Mins
Record Keeping	Manual	⚙️ <30 Sec per Record
End-to-End Accuracy	<60%	✓ 100%



What once took days now happens in minutes through seamless WhatsApp-driven automation

Technology-Led Deal Finalization

Rapid Request for quotations (RFQs) dissemination to multiple vendors within minutes enables competitive price discovery. Automated bid comparison reduces procurement complexity, shortens decision cycles, and lowers reliance on large sourcing teams.

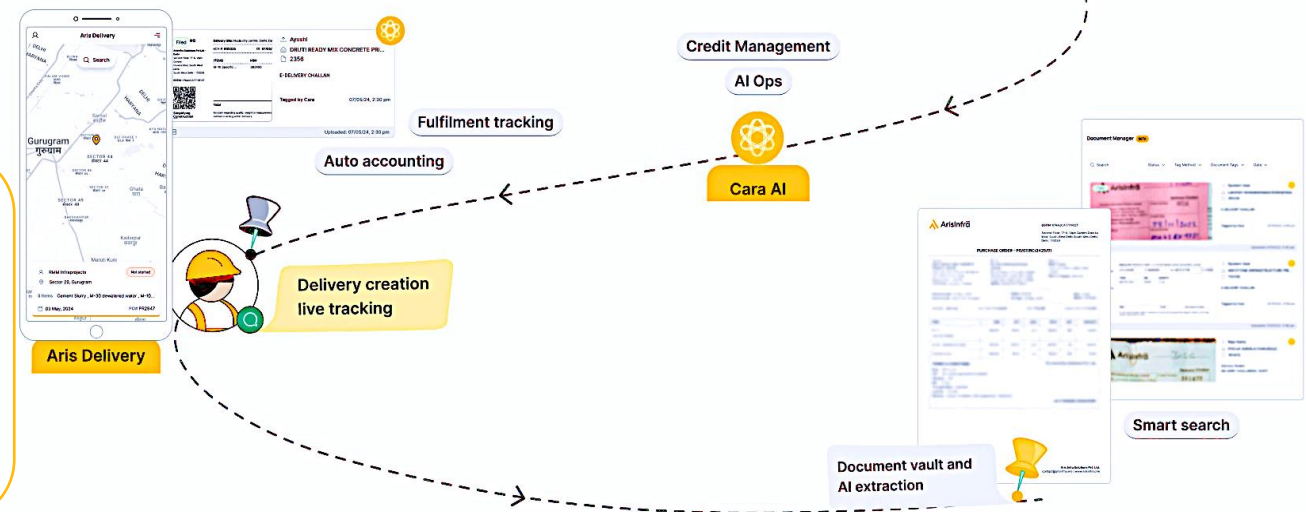


Data-Backed Decision Intelligence

Advanced analytics across RFQs, vendor pricing history, credit behavior, logistics data, and margin thresholds enable informed pricing, risk assessment, and deal approval decisions. Enhances margin control, credit discipline, and execution efficiency.

Integrated Delivery Management (ArisDelivery)

System-driven execution from purchase order to last-mile delivery ensures real-time tracking, coordinated dispatch, and operational efficiency. Reduces manual intervention, communication overhead, and staffing intensity.



AI-Driven Document Digitisation

End-to-end digitization of critical documents (quotations, POs, delivery challans, goods receipt notes) improves accuracy, reconciliation speed, and audit readiness. Cloud storage and AI-based handwritten recognition reduce risk of loss and transaction delays.

Automated Document Intelligence

- AI-powered verification extracts and validates key data from documents
- Stamp detection ensures compliance with ~95% accuracy
- Invoice processing reduced from 20+ days to under 24 hours
- Invoice and quantity disputes drop to an unprecedented < 1%, virtually eliminating revenue leakage

Real-Time Data & Reporting (CARA AI)

- Aggregates multi-source data into instant operational & financial insights
- On-demand reports delivered via WhatsApp for faster decision-making
- Enables real-time visibility across margins, credit, and performance

10:50
Cara from Aris Infra

Uploaded Delivery Challan 11:14 AM

Delivery has been marked as accepted at the site.

Identified as a Delivery Challan.

Delivery Challan E-02970 verified with customer stamp and sign!

10:50
Aris Infra Solutions Pvt Ltd

Greetings! We have identified the following customers for generating reports

1. ABC Infra Pvt. Ltd. 11:14 AM

Please select the report for customer, ABC Infra Pvt. Ltd. 11:14 AM

CREDIT REPORT
FLOW REPORT
CASH REPORT

Credit Report.pdf
Credit Report PDF for Customer ABC Infra Pvt. Ltd. 14:48

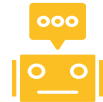
Credit Limit	Insured Limit
₹7,31,22,000.00	₹30,00,00,000.00
Available Limit	This FY Margin
₹5,57,53,515.00	6.9%

Sales

FY 23-24	₹ 14,34,000
Lifetime	₹ 14,34,000

Overdue after adj.

>90d	60-90d	30d	30d	60-90d	>90d
₹6,169.61	₹26,069.61	₹58,71,080	₹33,70,080	₹76,069.61	₹16,069.61



Conversational Business Queries: Users can ask simple questions like delivery status, receivables, or invoices and receive instant answers.



Real-Time Operational Intelligence: Tracks deliveries, deal status, margins, receivables, and operational KPIs in real time.



AI-Generated Reports: Automatically compiles data into dashboards, summaries, and actionable reports.



Anomaly Detection & Alerts: Highlights unusual trends in receivables, payments, margins, or operational activity.

9:41 ArisGPT >

You: Send challan 5123 to R

ArisGPT: i. Sent to Rajesh on WhatsApp. ii. The challan was for Tata Projects and we netted 5.5% margin on a GMV of 15L. iii. This was delivery 35 of the 53 expected.

Where are we on the deals

How many trucks delivered today in Navi Mumbai for Runwal?

Did we send Capacite any invoices today?

Overdue Vs Payments

13 Cr Total Overdue

Month	Overdue	Payments
Jan	1.5	1.5
Feb	2.0	2.0
Mar	2.5	2.5
Apr	3.0	3.0
May	3.5	3.5
Jun	4.0	4.0
Jul	4.5	4.5
Aug	5.0	5.0
Sep	5.5	5.5
Oct	6.0	6.0

Dues Distribution

Category	Amount (Cr)
Overdue Last 30 days	2.67
Overdue Last 30-90 days	2.65
Overdue > 90 days	2.65
Upcoming Dues	2.65

Send Exec Report Show

Message

9:41 Aris GPT

Share the latest receivables report and highlight anything I should watch out for?

Cara: Here's your receivables report 📊
Total Overdue : ₹13 Cr
Unused Credit

Outstanding

13 Cr Total Overdue

Month	Overdue
Jan24	1.5
Feb24	2.0
Mar24	2.5
Apr24	3.0
May24	3.5
Jun24	4.0
Jul24	4.5

We have an unused credit of ₹12 Cr

Dues Distribution

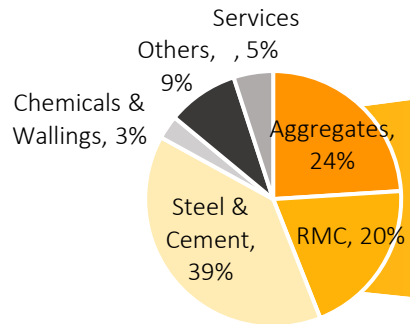
Category	Amount (Cr)
Overdue Last 30 days	2.67
Overdue Last 30-90 days	2.65
Overdue > 90 days	2.65
Upcoming Dues	2.65

Can you break this down? by Customer Show me the trend of last 6 months

Message

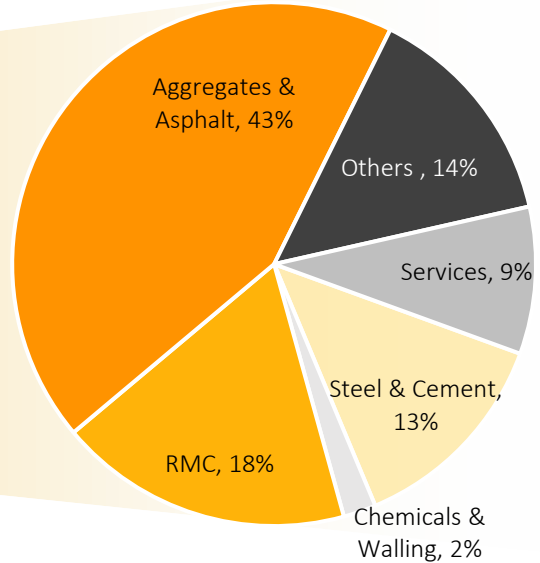
ArisGPT transforms operational data into instant intelligence, enabling faster decisions, greater transparency, and proactive risk management.

Revenue Distribution (%)



FY23

Revenue: INR 7,461 Mn
 EBITDA: INR (7) Mn
 EBITDA MARGIN: (0.09)%



FY26

Revenue: INR 10,675 Mn
 EBITDA: INR 1,007 Mn
 EBITDA MARGIN: 9.43%



Focused Categories

Reduced focus on lower value categories like Cement & Steel



Operationally Align Mix

Focus on categories where execution strength directly impacts outcomes



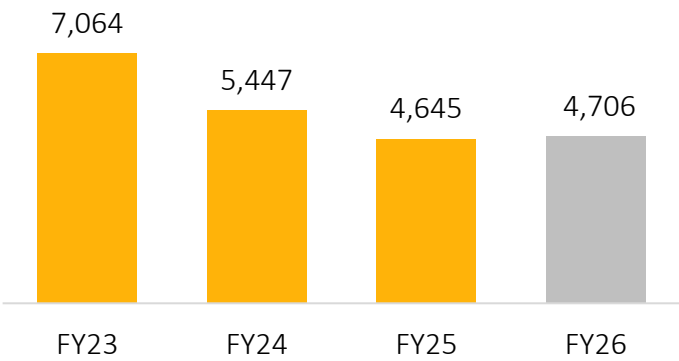
Scalable Profitability

Categories that support better unit economics and cash flow cycles

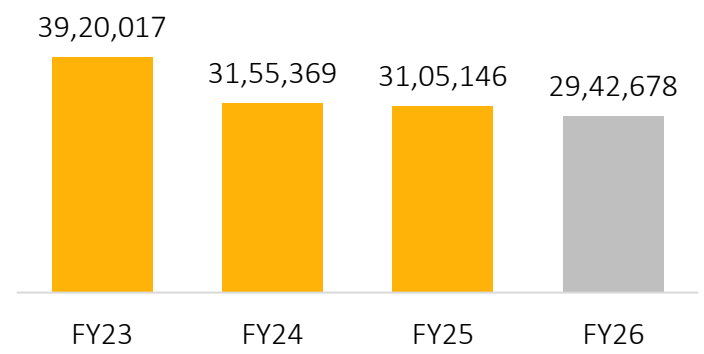
- The company provides developers and contractors efficient procurement solutions for construction projects through its network of manufacturers and suppliers of construction materials.
- The product portfolio includes aggregates, RMC, walling solutions, chemicals, steel, cement, tiles, electricals, plumbing, and other allied construction materials.
- It is building a diversified network of trusted SME/MSME suppliers and manufacturers across multiple regions.
- The company provides full-stack execution across the supply chain, covering sourcing, quality checks, logistics, delivery tracking, and documentation via its in-house technology platform.
- It is a high volume, relationship driven model where each client adds more transactions, better data, and stronger pricing insights.



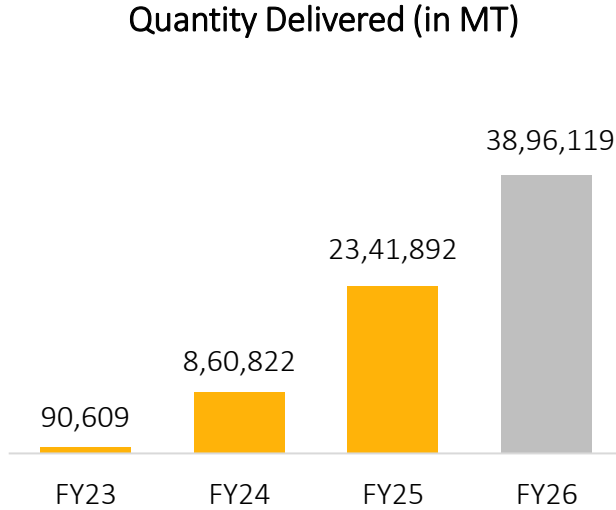
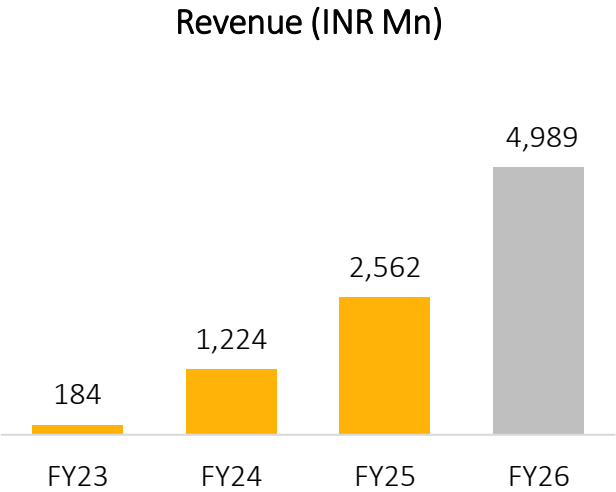
Revenue (INR Mn)



Quantity Delivered (in MT)



- Arisinfra Solutions secures 100% of output production capacity by partnering with factories that have underutilized production capacity under exclusive long-term agreements.
- It follows an asset-light model, keeping fixed costs low and eliminating depreciation, enabling higher returns while keeping capital liquid and redeployable.
- The company has no minimum offtake commitment, enabling flexible demand-led procurement with protected downside.
- Instead of buying products from the open market at fluctuating prices, the company books production capacity in advance with partner factories. This gives better price visibility and helps keep profit margins more stable.
- Partner factories also benefit because their plants run at higher utilization, creating a win-win situation as both sides grow volumes together.
- Contracts with these factories include safeguards like fair pricing commitments, damage protection and audit rights, which help manage risks and maintain financial discipline.



Reserved Capacity of
Aggregates

6 Plants

6.1 Million Tons

Reserved Capacity of
RMC

3 Plants

2.7 Million Tons

Reserved Capacity of
Asphalt

1 Plant

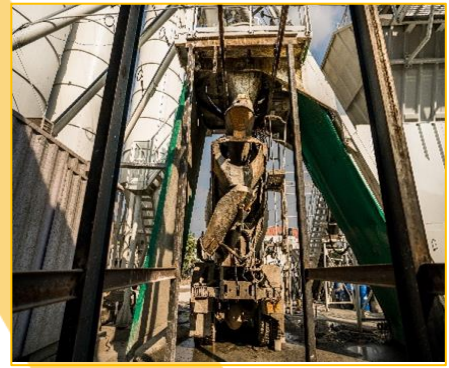
0.3 Million Tons

Benefits for Contract Manufacturing Partners

Higher Utilization: ARIS network drives steady demand, increasing plant utilisation from ~20% to 70%+.

Stronger Cash Flows: The network provides working capital support, improving liquidity and reducing financial stress.

Focus only on Manufacturing: Partners focus purely on manufacturing, while ARIS manages demand, sales, pricing, logistics, receivables and other operations.



- Through ArisUniterm RE Solutions, the company is operating a first-of-its-kind Developer-as-a-Service model for real estate developers.
- The company manages the entire real estate project lifecycle from arranging funds, material procurement, sales, marketing, and collections.
- It acts as a single point of contact for developers by coordinating with lenders, contractors, vendors and channel partners.
- The company leverages its network where every materials client becomes a potential DaaS mandate across new developments, JVs, and stressed projects eliminating the need for cold sales motion.
- It accelerates project completion by integrating project management with procurement, where each DaaS client becomes an exclusive materials client.

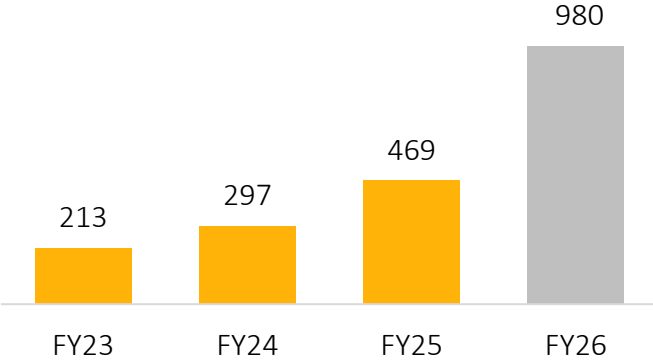
Current Portfolio*

9 Active Services Projects	INR 12,674 Mn Estimated Gross Development Value
2.05 Mn Sq. Ft. Services portfolio under execution	

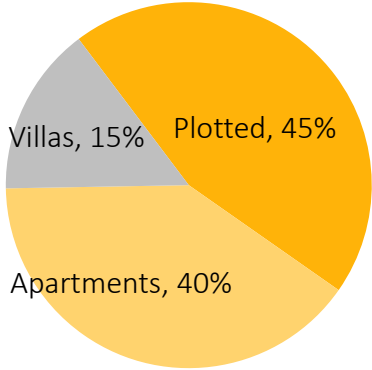
Strong Unit Economics

10-14% Fees on GDV	55-60% EBITDA Margins
NIL Incremental Capital	18-24 Months Execution Time

Revenue (INR Mn)



FY26 Mix based on GDV under execution



*All Figures as of FY26

Developer 1

Problems faced by the developer:

Construction was slow for the following reasons:

- Lack of enough working capital
- Complete reliance on sales and collections for construction
- Dispute with existing lenders
- Terms with contractor not well defined
- Slow sales

Solutions given by Uniterm:

- Replaced the existing lender with set of Investors
- Infused enough working capital by way of fresh funding
- Secured the project by obtaining full CC (Commencement Certificate)
- Provided uninterrupted material supply with flexible credit
- Infused a high-power sales team and increased sales by 3X
- Increased the pricing by 7.5% with better terms of payment
- Infused experienced project management team to speed up construction and renegotiated with the contractor

Developer 2

Problems faced by the developer:

- The original developer had gone bankrupt
- The lender was stuck with land

Solutions given by Uniterm:

- Identified an investor for the land and the lender sold to the investor
- Uniterm became a DM partner to the investor to provide end to end solutions
- Infused working capital of INR 250 Mn
- Got approvals for the land
- Supplied all construction materials with an average saving of 2%
- Launched the project and sold 1/3rd inventory in the first month
- Managed day to day cash flows and all day-to-day operations on behalf of the investor

Unlocking value in stressed or stalled real estate projects by aligning capital, execution, and sales to deliver disciplined turnarounds and full-cycle exits



STRATEGIC OVERVIEW

Working Capital Optimization: System and mix improvements steadily reduce net working capital days, unlocking cash on an ongoing basis.

Scalable at Near-Zero Cost: The network can handle 10x higher volumes on the same infrastructure, with each new node and order adding minimal incremental cost.

Deepen Category Expansion: Increase share in high-margin, execution-driven categories such as RMC, aggregates, asphalt and value-added materials.

Onboarding new Vendors: Add new vendors to expand network capacity and secure exclusive supply partnerships.

New Category Expansion: Expanding into tiles, CP fittings, sanitaryware, electricals, and plumbing to deepen wallet share and strengthen platform breadth.

Grow Services Vertical: Increase recurring, high-margin revenue streams alongside core supply.

Geographic Scale-Up: Expand presence across high-growth infrastructure corridors and Tier 1/Tier 2 real estate markets.

Scale Contract Manufacturing: Increase secured capacity through additional third-party plant tie-ups, enhancing operating leverage and expanding higher-margin segments.



FINANCIAL OVERVIEW



Q4-FY26 Financial Performance

Revenue from
Operations
INR 3,434 Mn
55.3% YoY

EBITDA
INR 305 Mn
202.0% YoY

EBITDA Margins
8.88%
431 Bps YoY

PAT
INR 217 Mn
4,440% YoY

PAT Margins
6.32%
655 Bps YoY

Diluted EPS
INR 2.58 /Share
1,175% YoY

FY26 Financial Performance

Revenue from
Operations
INR 10,675 Mn
39.1% YoY

EBITDA
INR 1,007 Mn
101.0% YoY

EBITDA Margins
9.43%
290 Bps YoY

PAT
INR 603 Mn
905.0% YoY

PAT Margins
5.65%
487 Bps YoY

Diluted EPS
INR 6.84 /Share
1,800% YoY

Contract Manufacturing Scaleup

- Contract Manufacturing businesses continued to scale strongly during the quarter, with revenue growing by 169% YoY, reinforcing the company's focus on high-margin business segment.
- Contract Manufacturing quantity delivered increased 91% YoY to 11.29 Lakh MT in Q4-FY26, supported by healthy demand and execution capabilities.
- Capacity utilisation improved to 50% in Q4-FY26 from 39% in Q4-FY25, reflecting better operational efficiency and higher throughput across manufacturing operations.

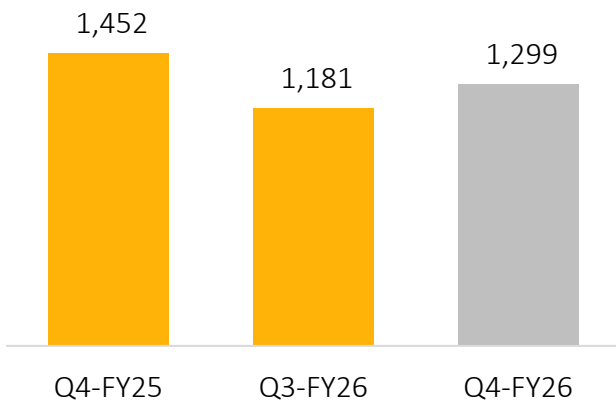
Asphalt - New Category Breakout

- Asphalt, a newly launched product category launched a quarter ago, continued to witness strong traction with revenue increasing to INR 299 Mn in Q4 FY26, up 88% sequentially.
- Active customers in the Asphalt segment nearly doubled to 28 in Q4-FY26 from 15 in Q3-FY26, highlighting strong customer acceptance and rapid market penetration.

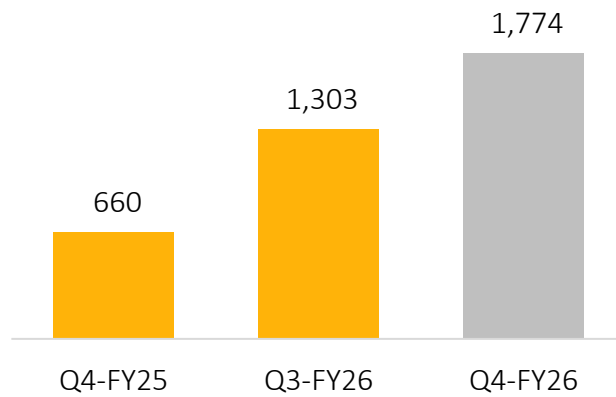
DaaS Acceleration

- DaaS revenue stood at INR 361 Mn in Q4-FY26, registering growth of 264% YoY and 61% QoQ, driven by strong project execution and increasing adoption of the company's service offerings.
- DaaS execution pipeline remained strong with 9 active projects and GDV under execution of INR 12,674 Mn, providing strong future revenue visibility.

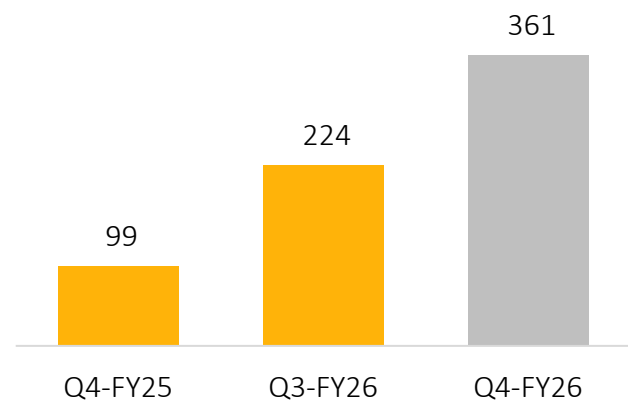
B2B Supply Revenue (INR Mn)



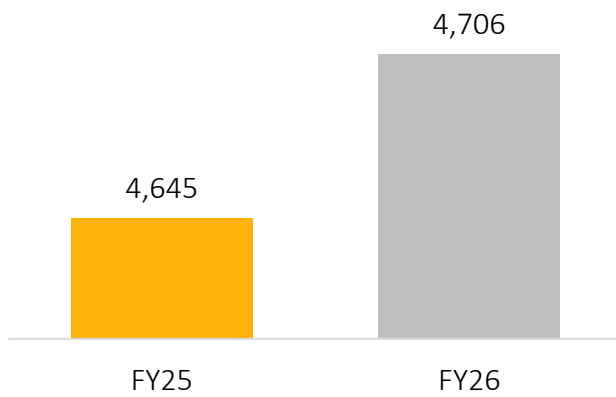
Contract Manufacturing Revenue (INR Mn)



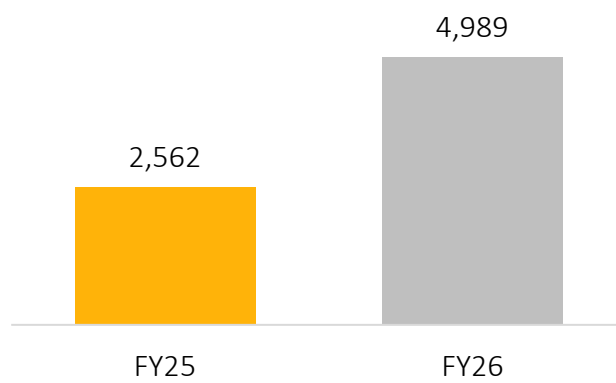
Services Revenue (INR Mn)



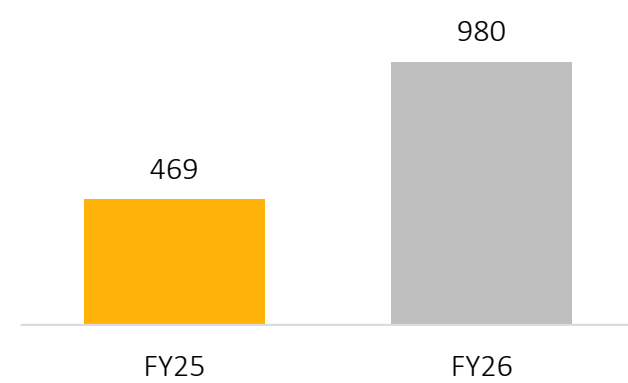
B2B Supply Revenue (INR Mn)



Contract Manufacturing Revenue (INR Mn)



Services Revenue (INR Mn)



Quarterly Consolidated Income Statement



Particulars (INR Mn)	Q4-FY26	Q4-FY25	Y-o-Y	Q3-FY26	Q-o-Q
Revenue from Operations	3,434	2,211	55.3%	2,708	26.8%
Total Expenses	3,129	2,110	48.3%	2,412	29.7%
EBITDA	305	101	NA	296	3.0%
<i>EBITDA Margins (%)</i>	<i>8.88%</i>	<i>4.57%</i>	<i>431 Bps</i>	<i>10.93%</i>	<i>(205) Bps</i>
Depreciation and amortisation expenses	17	8	NA	10	70.0%
Finance costs	61	114	(46.5)%	55	10.9%
Other Income	60	31	96.8%	16	NA
PBT before exceptional items	287	10	NA	247	16.2%
Exceptional Items	-	3	NA	-	NA
PBT	287	7	NA	247	16.2%
Tax	70	12	NA	64	9.4%
PAT	217	(5)	NA	183	18.6%
<i>PAT Margins (%)</i>	<i>6.32%</i>	<i>(0.23)%</i>	<i>655 Bps</i>	<i>6.76%</i>	<i>(44) Bps</i>
Other Comprehensive Income	-	-	NA	-	NA
Total Comprehensive Income	217	(5)	NA	183	18.6%
Diluted EPS (INR)	2.58	(0.24)	NA	1.89	36.5%

Annual Consolidated Income Statement



Particulars (INR Mn)	FY26	FY25	Y-o-Y
Revenue from Operations	10,675	7,677	39.1%
Total Expenses	9,668	7,176	34.7%
EBITDA	1,007	501	NA
<i>EBITDA Margins (%)</i>	<i>9.43%</i>	<i>6.53%</i>	<i>290 Bps</i>
Depreciation and amortisation expenses	41	33	24.2%
Finance costs	279	415	(32.8)%
Other Income	124	143	(13.3)%
PBT before exceptional items	811	196	NA
Exceptional Items	25	73	(65.8)%
PBT	786	123	NA
Tax	183	63	NA
PAT	603	60	NA
<i>PAT Margins (%)</i>	<i>5.65%</i>	<i>0.78%</i>	<i>487 Bps</i>
Other Comprehensive Income	(1)	5	NA
Total Comprehensive Income	602	65	NA
Diluted EPS (INR)	6.84	0.36	NA

Historical Consolidated Income Statement



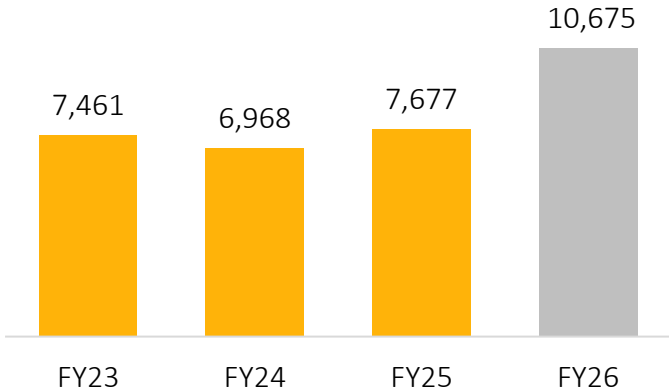
Particulars (INR Mn)	FY23	FY24	FY25	FY26
Revenue from Operations	7,461	6,968	7,677	10,675
Total Expenses	7,468	6,840	7,176	9,668
EBITDA	(7)	128	501	1,007
<i>EBITDA Margins (%)</i>	<i>(0.09)%</i>	<i>1.84%</i>	<i>6.53%</i>	<i>9.43%</i>
Depreciation and amortisation expenses	20	29	33	41
Finance costs	239	323	415	279
Other Income	84	56	143	124
PBT before exceptional items	(182)	(168)	196	811
Exceptional Items	-	-	73	25
PBT	(182)	(168)	123	786
Tax	(28)	5	63	183
PAT	(154)	(173)	60	603
<i>PAT Margins (%)</i>	<i>(2.06)%</i>	<i>(2.48)%</i>	<i>0.78%</i>	<i>5.65%</i>
Other Comprehensive Income	(1)	-	5	(1)
Total Comprehensive Income	(155)	(173)	65	602
Diluted EPS (INR)	(4.13)	(5.30)	0.36	6.84

Historical Consolidated Balance Sheet

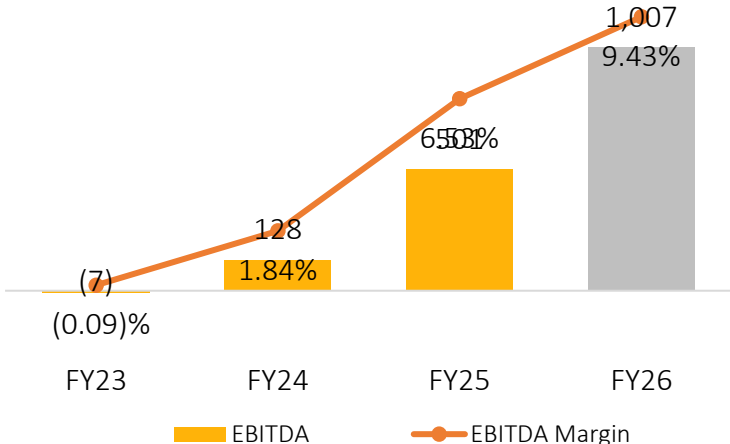
PARTICULARS (INR MN)	FY24	FY25	FY26
Non-Current Assets			
Property, plant and equipment	24	18	67
Capital work in progress	-	-	11
Right use of assets	14	36	154
Other intangible assets	-	1	1
Intangible assets under development	246	414	569
Financial Assets			
i) Other non current financial assets	84	69	80
ii) Loans and advances	-	5	1,685
Deferred tax assets (net)	60	87	90
Non current tax assets (net)	34	18	11
Other non current assets	39	-	633
Total Non-Current Assets	501	648	3,301
Current Assets			
Inventories	13	16	39
Financial Assets			
i) Trade receivables	3,204	3,270	4,100
ii) Cash and cash equivalents	6	3	1,014
iii) Bank balances other than cash and cash equivalents	1	452	178
iv) Other financial assets	762	847	299
Other Current Assets	441	1,731	1,484
Total Current Assets	4,427	6,319	7,114
GRAND TOTAL - ASSETS	4,928	6,967	10,415

PARTICULARS (INR MN)	FY24	FY25	FY26
Equity			
Equity Share Capital	18	117	164
Other Equity	1,398	2,195	7,227
Non-Controlling Interest	5	46	119
Total Equity	1,421	2,358	7,510
Non-Current Liabilities			
Financial Liabilities			
i) Long Term Borrowings	678	30	-
ii) Lease Liabilities	4	15	108
iii) Other non current financial liabilities	116	62	77
Long Term Provisions	12	18	25
Total Non-Current Liabilities	810	125	210
Current Liabilities			
i) Short Term Borrowings	2,062	3,363	548
ii) Lease Liabilities	11	23	46
iii) Trade Payables	449	701	1,733
iv) Other financial liabilities	76	153	160
Short Term Provisions	10	6	6
Current Tax Liabilities	-	51	93
Other Current Liabilities	89	187	109
Total Current Liabilities	2,697	4,484	2,695
Total Liabilities	3,507	4,609	2,905
GRAND TOTAL - EQUITIES & LIABILITIES	4,928	6,967	10,415

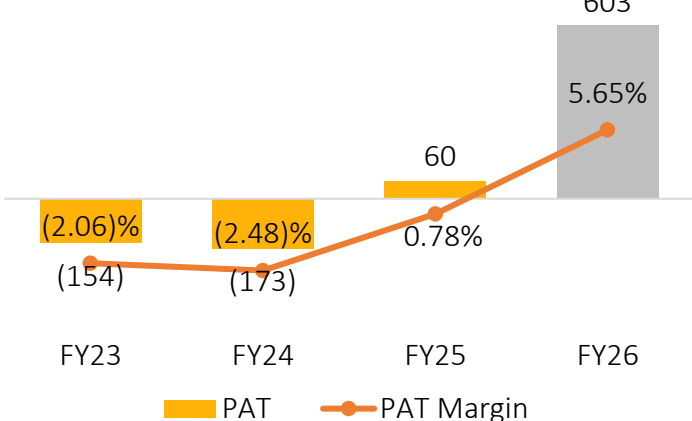
Revenue from Operations (INR Mn)



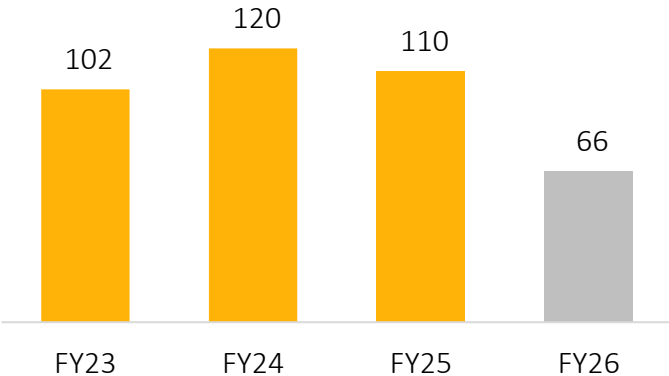
EBITDA (INR Mn) & EBITDA Margin (%)



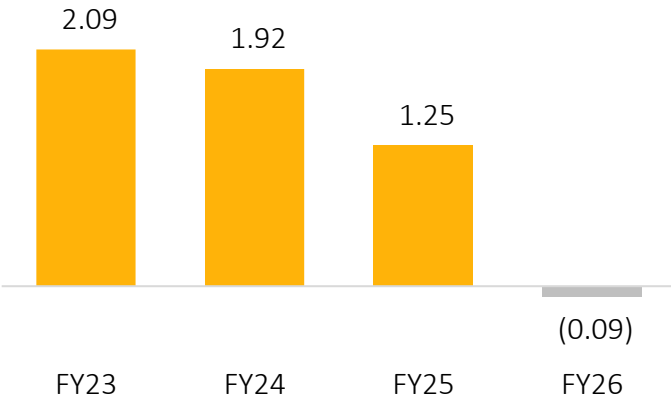
PAT (INR Mn) & PAT Margins (%)



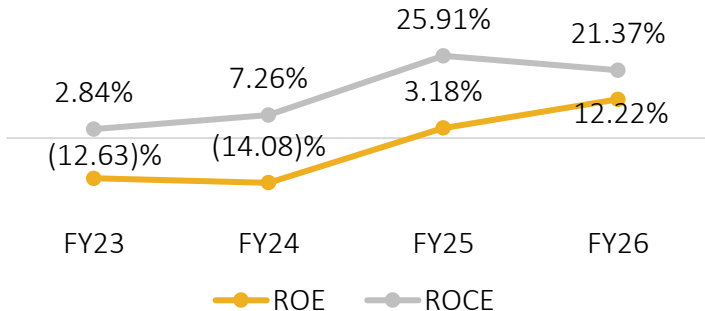
Net Working Capital Days



Net Debt/Equity (x)



ROE (%) & ROCE (%)



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