Wealth from Waste

Alufluoride Ltd.

Mulagada, Mindi, Visakhapatnam 530 012, India
+91 891 254 8567 | Contact@alufluoride.com
www.alufluoride.com
CIN – L24110AP1984PLC005096

Date: 12th August, 2026

To,
The Corporate Relationship Department
BSE Limited
Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai 400001.

Scrip Code: 524634

Sub: Investor presentation for the quarter ended on 30th June,2026

Dear Sir,

We enclosed herewith the Investor Presentation on the un-audited financial results of the Company for the quarter ended on 30th June,2026.

Kindly take the same on records with the acknowledgement on the receipt of the same.

Yours' faithfully
For Alufluoride Limited

VKohli

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Vaishali Kohli
Company Secretary and Compliance Officer
Membership No.: ACS 63818

Volumes
Constraint
Recovery

Alufluoride

Alufluoride Limited

Q1 FY27 Results Presentation

11 August 2026

Q1 FY27 Highlights

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₹26.6 Cr Revenue from operations -39% YoY | -49% QoQ	**₹6.9 Cr** EBITDA -8% YoY | op. margin 17.1% vs 16.4%	**₹2.7 Cr** Profit after tax -12% YoY | -41% QoQ
₹3.51 Earnings per share -12% YoY (vs ₹3.97)	**₹2.4 Cr** Other income vs ₹0.3 Cr in Q1FY26	**17.4%** Effective tax rate vs 30.3% in Q1FY26
₹25.6 Cr Total expenses -42% YoY on lower volumes	**24,000 TPA** Installed capacity final phase, June 2026	**₹4 / share** FY26 final dividend (40%) approved at AGM, 16 Jul 2026

The Quarter in Callouts

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A volume-led decline

Revenue fell 39% YoY to ₹26.6 crore as FSA availability tightened from late May; the shortfall was volumes, not demand or price

Unit economics held

Operating margin before other income improved to 17.1% from 16.4% a year earlier; contracted May pricing and stocked alumina hydrate protected the unit

Profit better than the top line

PAT fell only 12% against the 39% revenue decline, to ₹2.7 crore, helped by ₹2.4 crore other income and a lower tax charge

Commitments met throughout

FSA was sourced from distant suppliers despite higher freight, so customer deliveries to the smelters continued through the quarter

The constraint, disclosed early

The FSA shortfall traces to sulphur and ammonia disruption at fertiliser complexes amid the West Asia conflict; disclosed to exchanges on 23 May 2026

Supply since resolved

On 15 July 2026 the supplier reported the issue resolved and raised plant load; operations at Visakhapatnam are being restored to normal levels

The Constraint, and the Response

Alufluoride

Disclosed to exchanges on 23 May 2026; supplier reported resolution on 15 July 2026

What happened

- US–Iran conflict and Strait of Hormuz tensions disrupted sulphur and ammonia shipments to Indian fertiliser complexes
- FSA, our key raw material and their byproduct, was constrained in turn
- On-site FSA stocks tightened from late May 2026; production and revenue scaled back through the quarter
- The impact fell largely in Q1 FY27; on 15 July the supplier reported the issue resolved and raised plant load

Our response

- Sales contracts finalised in May 2026, securing a measure of price protection; deliveries to smelters met throughout
- Supplier base widened: Coromandel Kakinada supplying from April 2026; IFFCO Paradeep revamping fluorine recovery
- FSA sourced from distant suppliers despite higher freight; alumina hydrate stocked earlier at favourable prices
- Company expects FSA availability to improve over the coming quarters as operations normalise

Financials

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Volume-led revenue decline; margins and profit better than the top line

Income Statement

₹ Crore

Revenue down 39% on lower volumes; PAT down only 12% on higher other income and a lower tax charge

	Q1FY27	Q1FY26	%
Revenue (ops)	26.6	43.8	(39%)
Other income	2.4	0.3	590%
Total income	28.9	44.1	(34%)
Finance costs	0.97	0.77	26%
Depreciation	2.62	2.29	14%
PBT pre-except.	3.3	4.5	(25%)
Tax expense	0.6	1.4	(57%)
Profit after tax	2.7	3.1	(12%)
EPS (₹)	3.51	3.97	(12%)

Income Mix

₹ Crore

The fall is concentrated in AlF_3 volumes; other income rose sharply on treasury gains

	Q1FY27	Q1FY26	%
AlF_3 operations	26.0	42.9	(40%)
Captive solar	0.6	0.8	(28%)
Other income	2.4	0.3	590%
Total income	28.9	44.1	(34%)
OI share of PBT	71%	8%	-1290 bps

Margins & Ratios

₹ Crore

Operating margin before other income improved YoY; the effective tax rate fell sharply

	Q1FY27	Q1FY26	%
Op. margin (bef OI)	17.1%	16.4%	+70 bps
PAT margin	9.5%	7.0%	+250 bps
Effective tax	17.4%	30.3%	–

Metric	Q1FY27	Q1FY26
Revenue	26.6	43.8
Less: op. cost	(22.0)	(36.6)
Op. profit	4.6	7.2

Key Financials

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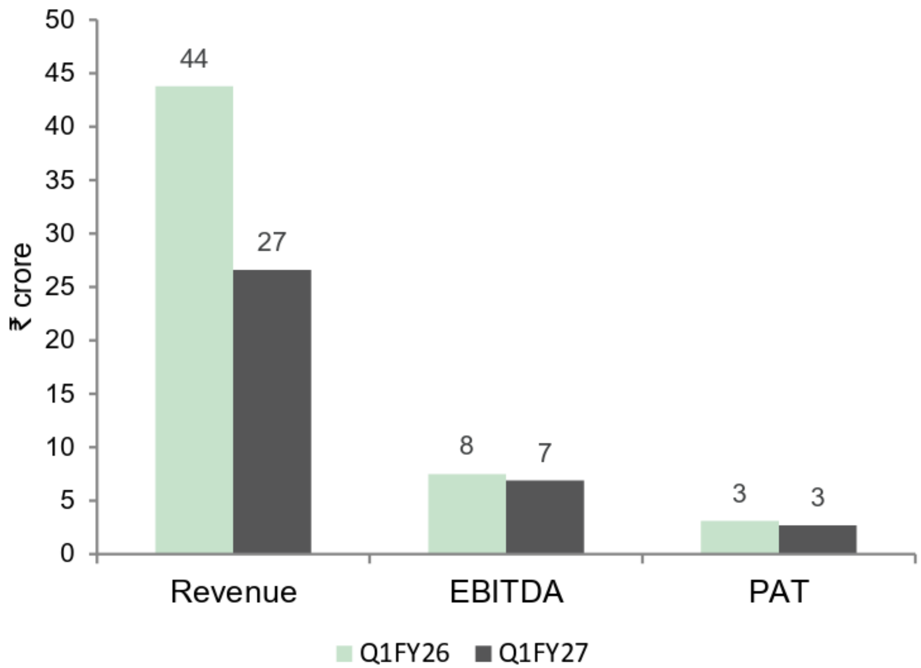
Revenue down on volumes; EBITDA and profit far more resilient (₹ crore)



₹2.7 Cr

profit after tax (down 12% YoY vs 39% revenue)

17.1%

operating margin before other income (16.4% in Q1FY26)

₹3.51

earnings per share (Q1FY26: ₹3.97)

Resolved

FSA supply, per 15 July 2026 intimation

Customer/Revenue Concentration

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AlF3 operations dominate
Aluminium Fluoride is ₹26.0 crore of Q1FY27 revenue (down 40% YoY on volumes); a single line of product, so no Ind AS 108 segment split applies

Solar stays immaterial
Captive solar contributed ₹0.6 crore, largely for own use with surplus sold to the grid; it lowers conversion cost rather than being a revenue stream

Other income, larger this quarter
Other income rose to ₹2.4 crore from ₹0.3 crore on treasury gains, a meaningful cushion to profit while operating revenue was constrained

Concentrated by customer
The largest customer was 69% of AlF3 revenue in FY25 (52% in FY24), reflecting consolidation among Indian smelters rather than any commercial weakness

A qualified, sticky book
Qualified to serve every major Indian smelter, Hindalco, Vedanta and NALCO; two customer awards confirm standing, and qualification is slow to win and slow to lose

Widening the base
The Company is pursuing qualification of additional buyers and overseas markets through Alufluoride International Pte. Ltd., Singapore

How We Create Value

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Phosphatic Fertiliser Complexes

Hydro-fluosilicic Acid (FSA), a difficult-to-dispose fluorine byproduct, is recovered rather than discharged

Alufluoride, Visakhapatnam

FSA converted into high-purity Aluminium Fluoride at a 24,000 TPA coastal plant, powered in part by 4.1 MW captive solar

Primary Aluminium Smelters

AlF_3 serves as the flux in electrolytic reduction of alumina at Hindalco, Vedanta and NALCO

Fourfold benefit

- Pollution abatement
- Import substitution
- Resource conservation
- Lower carbon footprint

The Opportunity

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A structural demand runway for AlF_3, behind a qualification moat few can cross

Growing Demand

- ✓ Indian primary aluminium smelting capacity continues to expand
- ✓ Each principal customer has announced material capacity additions over the medium term
- ✓ 14–20 kg of AlF_3 is consumed per tonne of aluminium produced

A Narrow Field

- ✓ Fewer than five AlF_3 manufacturers in India; only a few qualify for high-purity, low-bulk-density supply
- ✓ Smelter qualification is slow and exacting; an off-spec consignment can damage potlines
- ✓ Quality, consistency and reliability win business, not price alone

Waste to Wealth

- ✓ Converts a fluorine effluent into a product of value
- ✓ Substitutes imports and conserves fluorspar and sulphur
- ✓ Lowers the carbon footprint of primary aluminium

Manufacturing and Supply Network

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24,000

TPA installed capacity (80 TPD)

4.1 MW

captive solar power

102

employees as on 31 March 2026

3 ISO

certifications: 9001, 14001, 45001

The Visakhapatnam advantage

- Only AlF_3 manufacturer in Andhra Pradesh; within manageable freight range of every major Indian smelter
- Coastal location keeps outbound logistics efficient; on the same coast as both principal FSA suppliers

FSA supply arrangements

- IFFCO Paradeep: long-term contract scaled to over 17,500 TPA, with potential to expand to 19,000 TPA
- Paradeep Phosphates: supplemental volumes as available and on-spec
- Coromandel International: Visakhapatnam plant, plus new Kakinada plant supplying from April 2026 (~4,500 TPA combined)

Strategic Roadmap

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Backward integration, adjacencies, and a disciplined overseas reset

Alumina Hydrate

Greenfield facility under exploration, raw material security and a separate vertical. Objects Clause altered by postal ballot, April 2025.

Second-Site AlF3

Potential additional AlF3 capacity at a second location under evaluation, domestic and overseas.

Fluorine Derivatives

Adjacent fluorine-derivative chemistries being assessed as a natural extension of core capability.

Silica Value-Add

Value-added products from Silica, a byproduct of our own AlF3 process, closing another loop.

Green Logistics

Transport of raw materials through Electric Vehicles under examination.

Overseas, Reset

Jordan JV exit completed; write-downs absorbed. Alufluoride International Pte. Ltd., Singapore, pursues overseas markets at much reduced cost.

A formal commitment on new projects will follow once specifications, capital cost, financing and revenue economics are determined to the Board's satisfaction.

Thank you

Alufluoride

Venkat Akkineni, Managing Director

Aditya Akkineni, Whole-Time Director & CEO

Contact@alufluoride.com

Alufluoride Limited

Mulagada, Mindi, Visakhapatnam 530 012 | BSE: 524634 | CIN: L24110AP1984PLC005096