

Ref No: RML/2026-27/672

Date: May 07, 2026

To,  
**BSE Limited**  
**Scrip Code: 543228**

**National Stock Exchange of India Limited**  
**Symbol: ROUTE**

**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 Friday, May 08, 2026 to the Analysts in connection with the Audited Financial Results of the Company for the quarter and year ended March 31, 2026.

The same is also available on the Company's website at [www.routemobile.com](http://www.routemobile.com)

You are requested to take the above information on record.

Thanking you

Yours truly,  
**For Route Mobile Limited**

**Tejas Shah**  
Company Secretary & Compliance Officer  
ICSI Membership No.: A34829

Encl: as above



# Earnings Update

## Q4 and FY 25-26

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Investor Presentation  
May 7, 2026

# Safe Harbor



Certain statements mentioned in this presentation concerning our future growth prospects are forward looking statements (the “Forward Statements”) and are based on reasonable expectations of the management, which involves a number of risks, and uncertainties that could cause actual results to differ materially from those in such Forward Statements. The risks and uncertainties relating to these Forward Statements include, but are not limited to, risks and uncertainties regarding fluctuations in our earnings, fluctuations in foreign exchange rates, revenue and profits, our ability to generate and manage growth, competition in CPaaS globally, wage increases in India, our ability to attract and retain highly skilled professionals, time and cost overruns on fixed-price and fixed time frame contracts, industry segment concentration, our ability to manage our international operations, our revenues being highly dependent on clients in the United States of America, reduced demand for technology in our key focus areas, disruptions in telecommunication networks or system failures, our ability to successfully complete and integrate potential acquisitions, liability for damages on our service contracts, withdrawal of fiscal governmental incentives, political instability, adverse impact of global pandemics (including COVID-19 impact), war, legal restrictions on raising capital or acquiring companies, unauthorized use of our intellectual property(ies) and general economic conditions affecting our businesses and industry. We may, from time to time, make additional written and oral Forward Statements . We do not undertake to update any Forward Statements that may be made from time to time by us or on our behalf, unless required under the law.

# Route Mobile - Industry Leading Global CPaaS Platform



RML offers a scalable and flexible **Omnichannel CPaaS** platform to enterprises across industry verticals, globally



**280+** direct MNO connects, overall access to **900+** MNOs (**Super Network**)



Global footprint across **20+ locations**; **3,100+** active billable clients



Infrastructure comprising **20+ data centers** and **6 SMSCs** globally



**ESG leader**, rated **"A"** by a reputed ESG rating agency



Visionary in Magic Quadrant for CPaaS 2025 – **Gartner**  
Key Vendor in four Hype Cycle Reports – **Gartner**  
"Top Tier 1 A2P SMS vendor" – **Rocco**



**₹44,082 mn** FY 25-26 Revenue



**₹5,259 mn** FY 25-26 EBITDA



**174.9 bn** billable transactions processed in FY25-26



**₹ 13,887 mn** Cash as on 31 March 2026



**110%** CFO / EBITDA conversion in FY25-26



Board proposed **₹ 2 per share final dividend**

# Global Diaspora - Footprint & Super Network

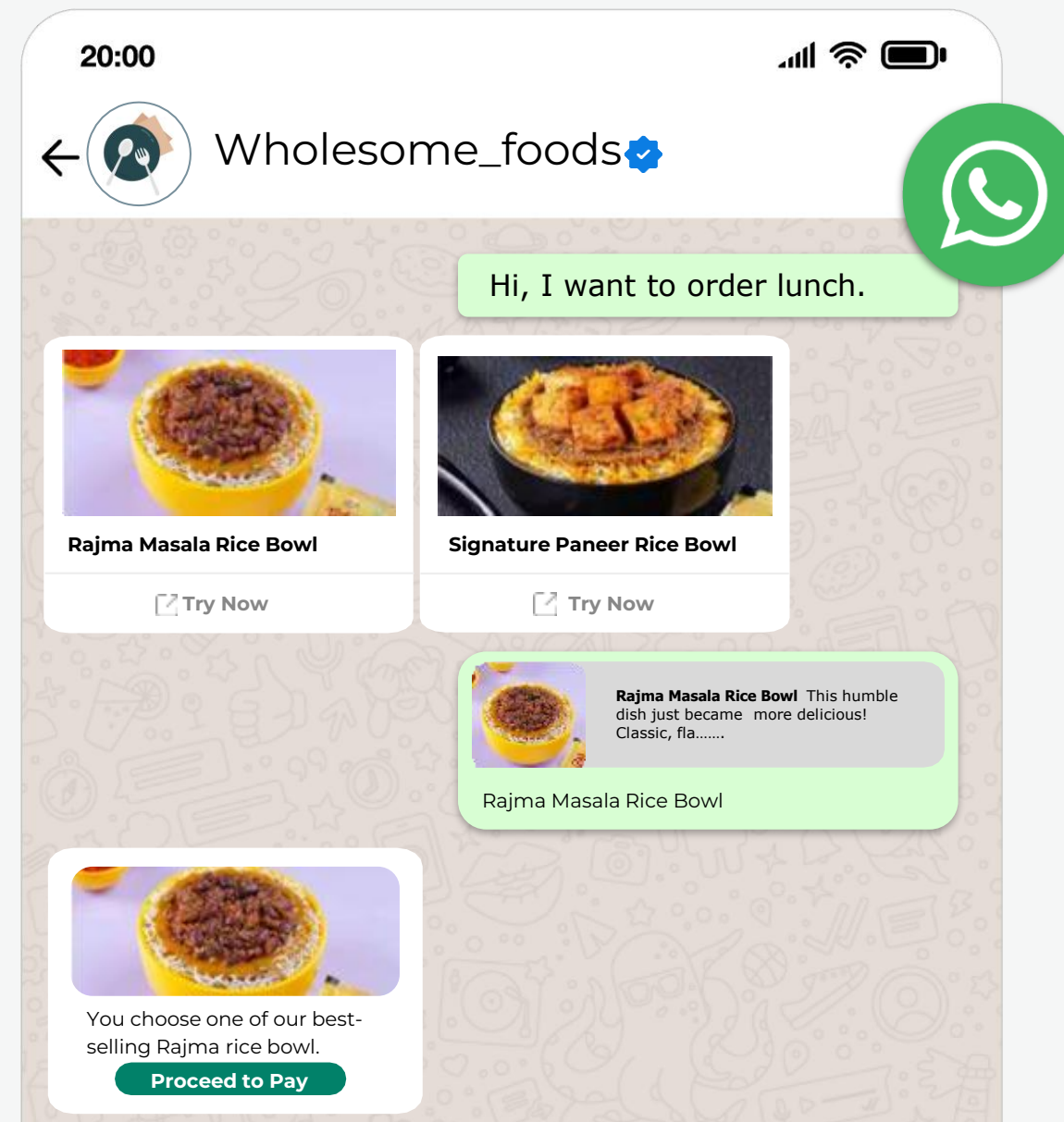


Data as on March 31, 2026

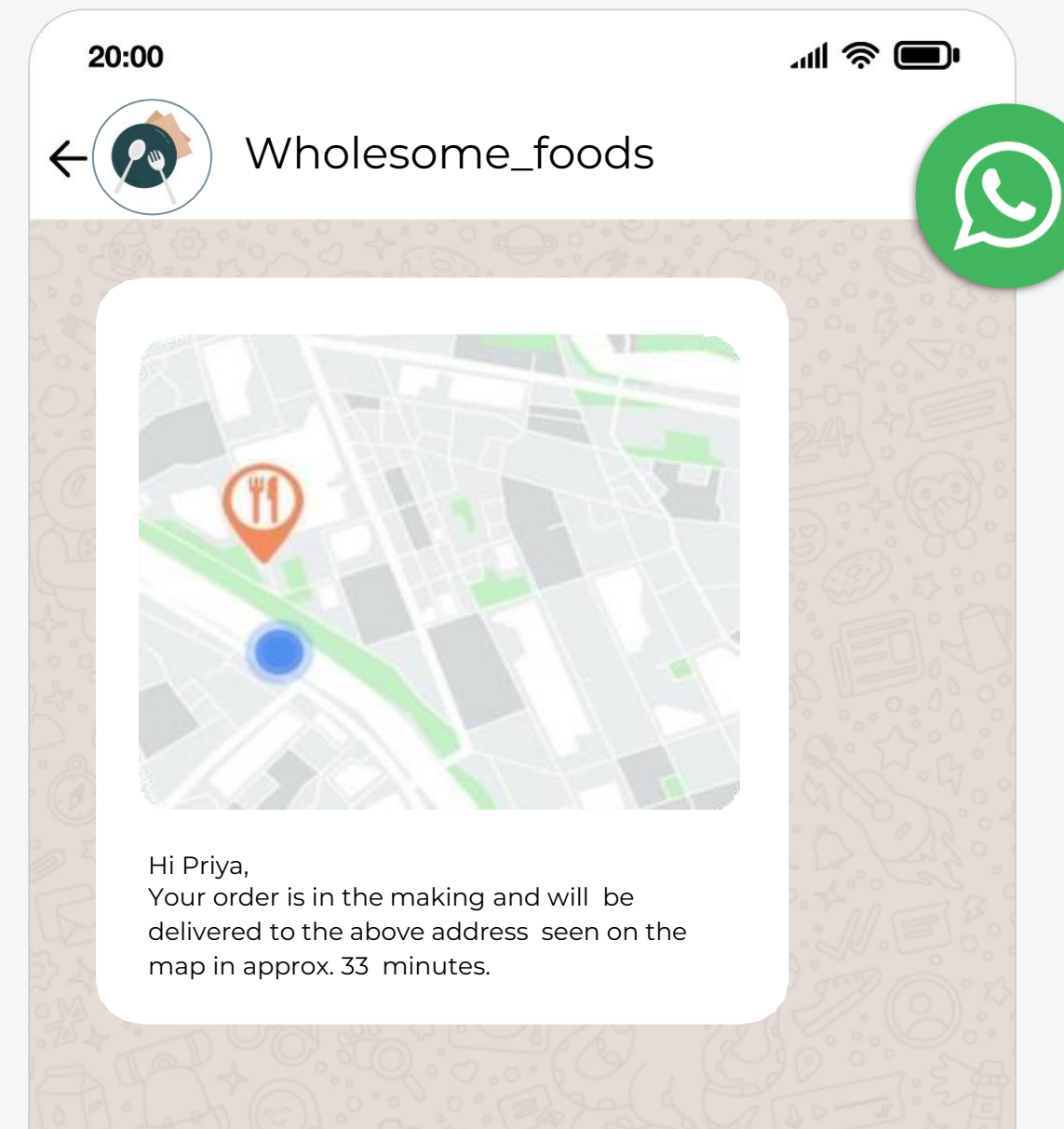
# **Key** Developments

# Focus on Expanding Product Portfolio

Largest global operator of iconic quick service and casual dining brands across the Middle East and North Africa, offering a diverse portfolio of dining



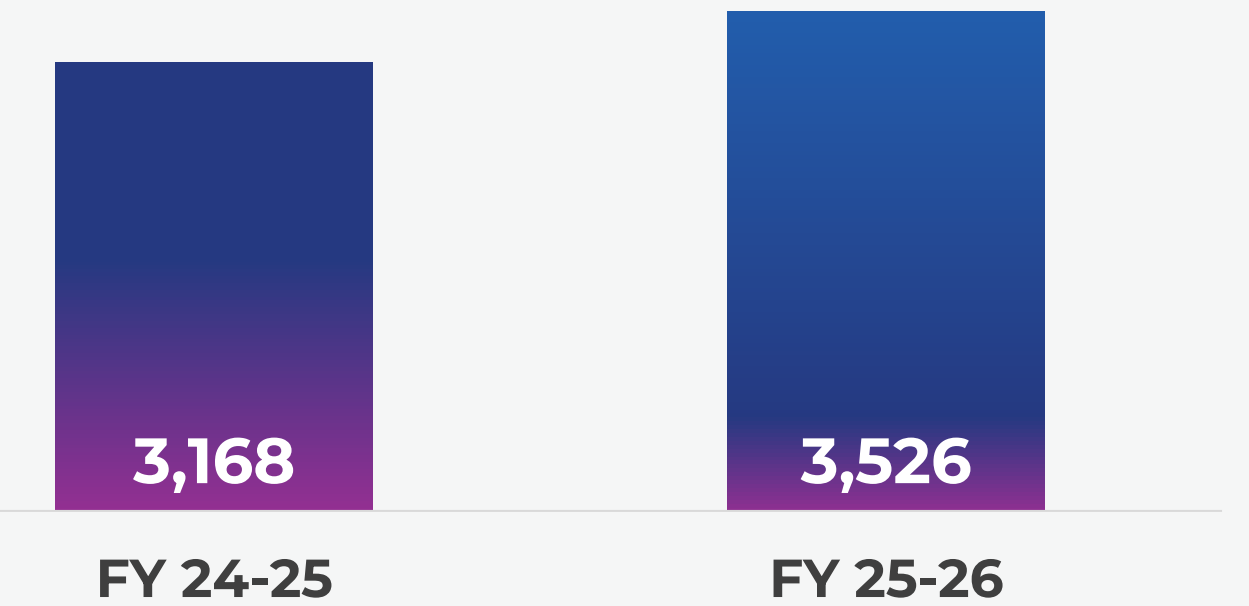
- **+30% increase** in orders
- **Secure communication**, enhanced trust
- Leveraged WhatsApp for streamlined customer engagement and **quick order placement**.



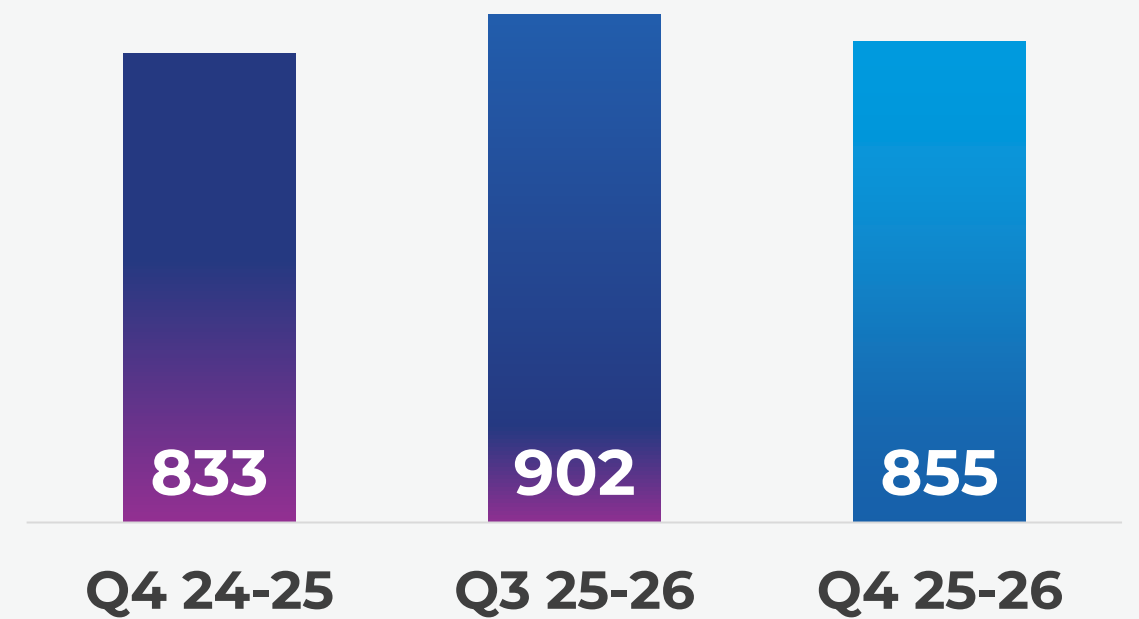
- **Delivery times reduced by 2x**
- **High-precision geolocation pin sharing**
- Enabled real-time routing, masked phone numbers between clients and drivers, and used high-precision geolocation pin sharing for accurate deliveries.

New Products Revenue  
(in ₹ mn)

11.3% Y-o-Y growth



2.6% Y-o-Y growth  
-5% Q-o-Q growth



Q-o-Q decline due to normalization of excess volume received during festive season

# **Key** Business Metrics

# Diverse Customer Base



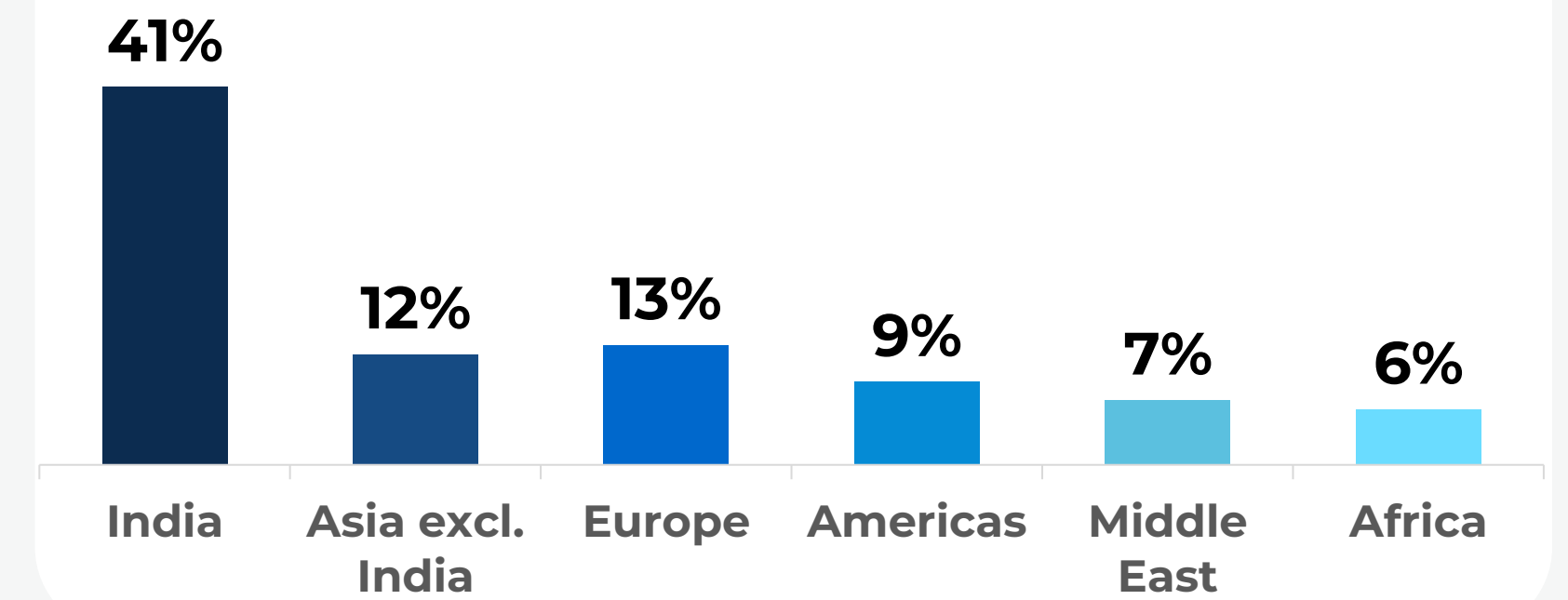
Revenue contribution from select industries in FY 25-26



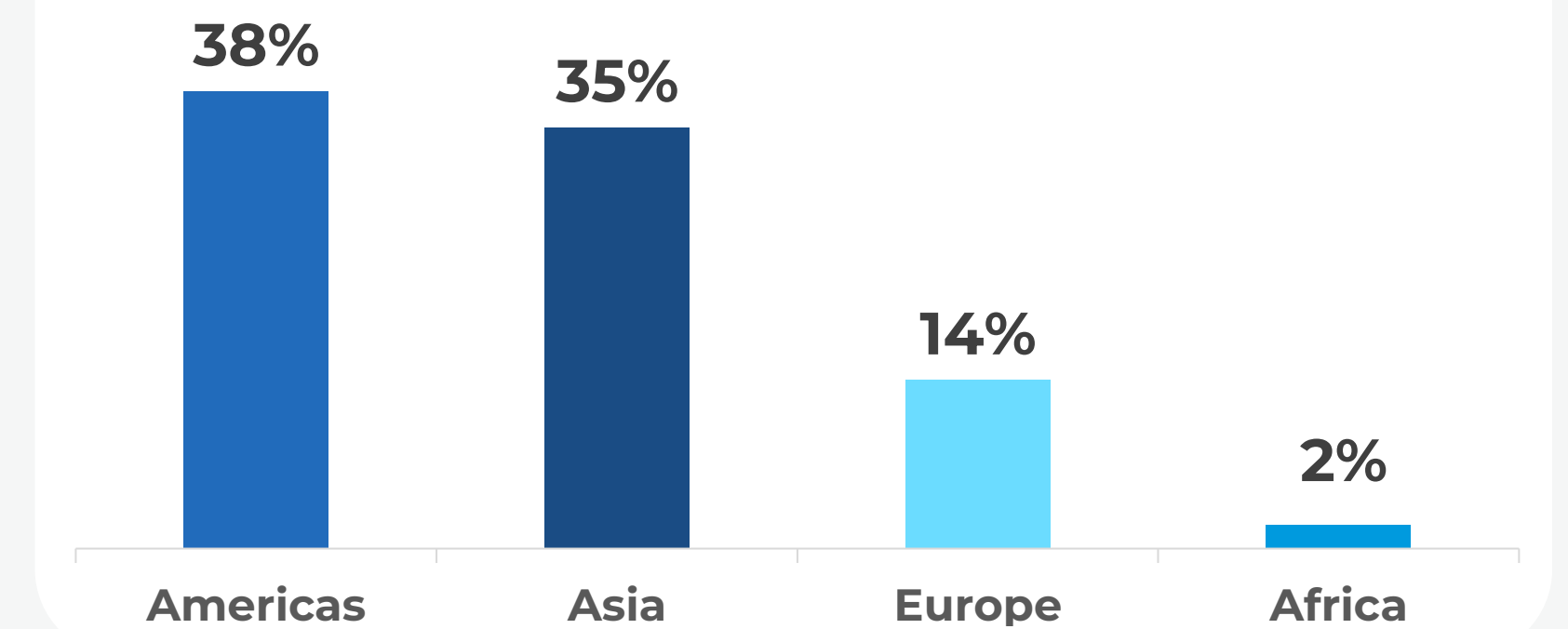
(1) Top 50 countries contribute c. 88% of FY 25-26 revenue from operations

(2) Top 150 customers - contribute c. 90% of FY 25-26 revenue from operations

Revenue for Top 50 countries by termination<sup>(1)</sup>



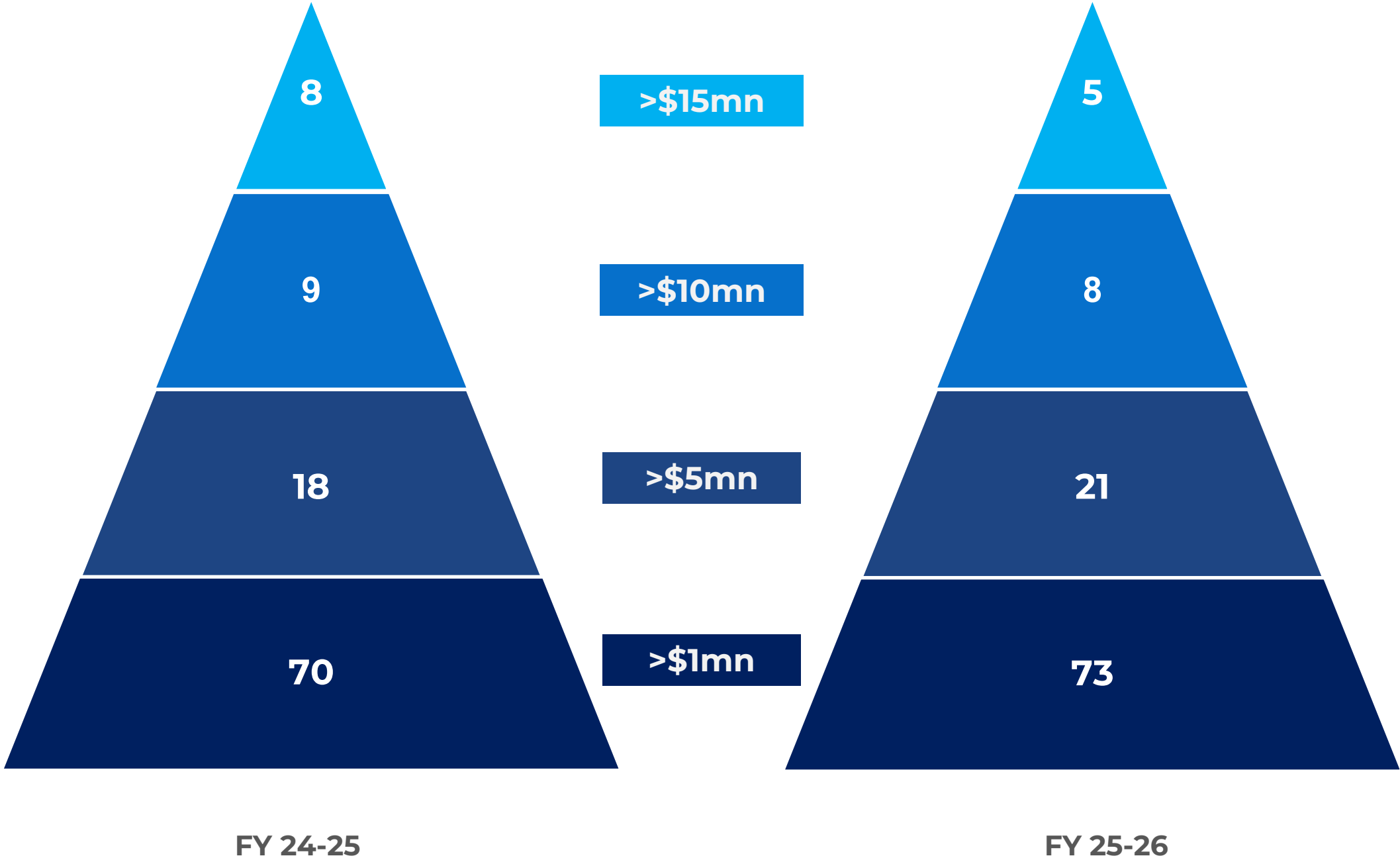
Revenue by customer HQ continent<sup>(2)</sup>



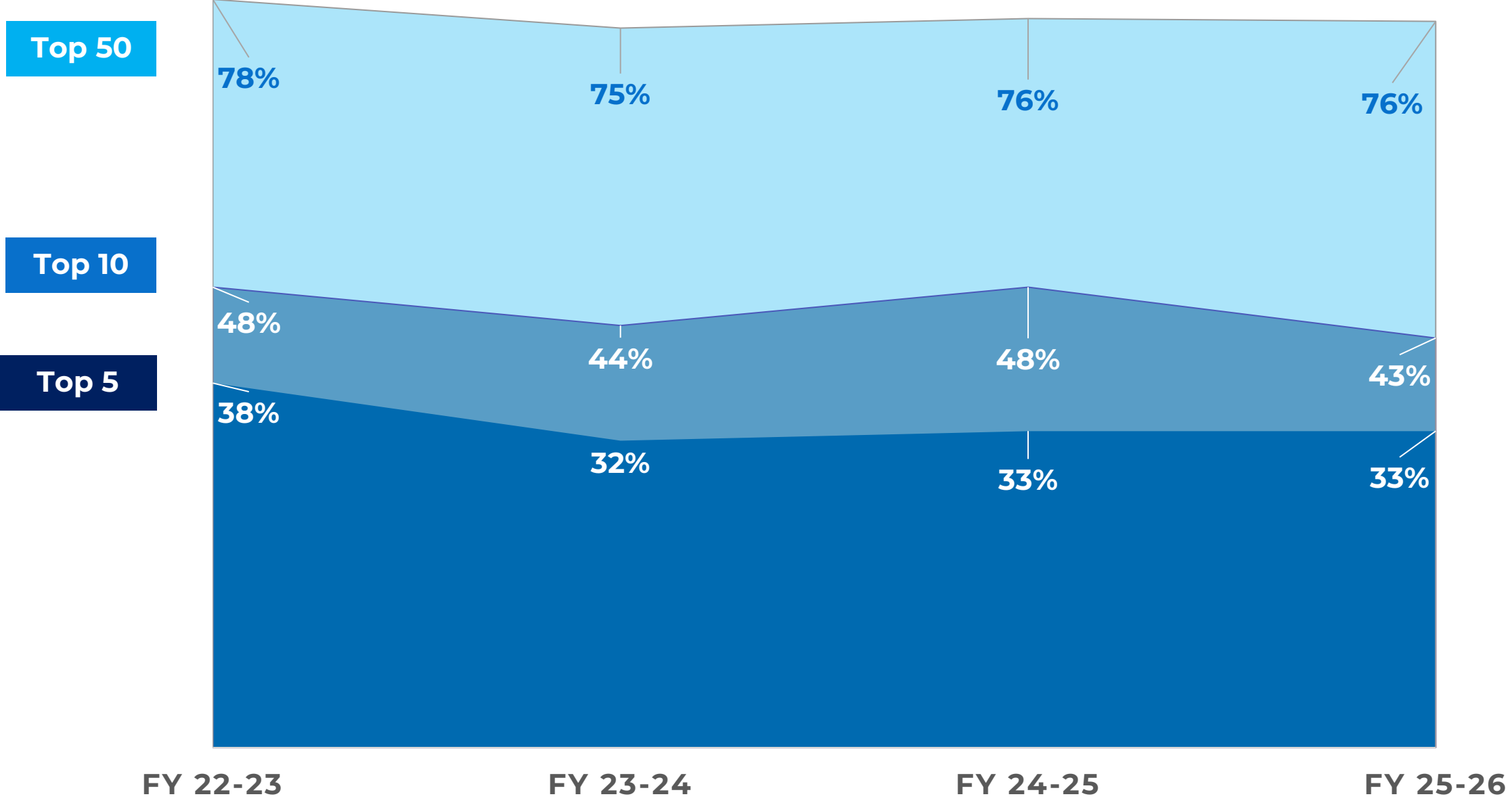
# Customer Cohort Analysis



### Clients by Account Size



### Client Concentration

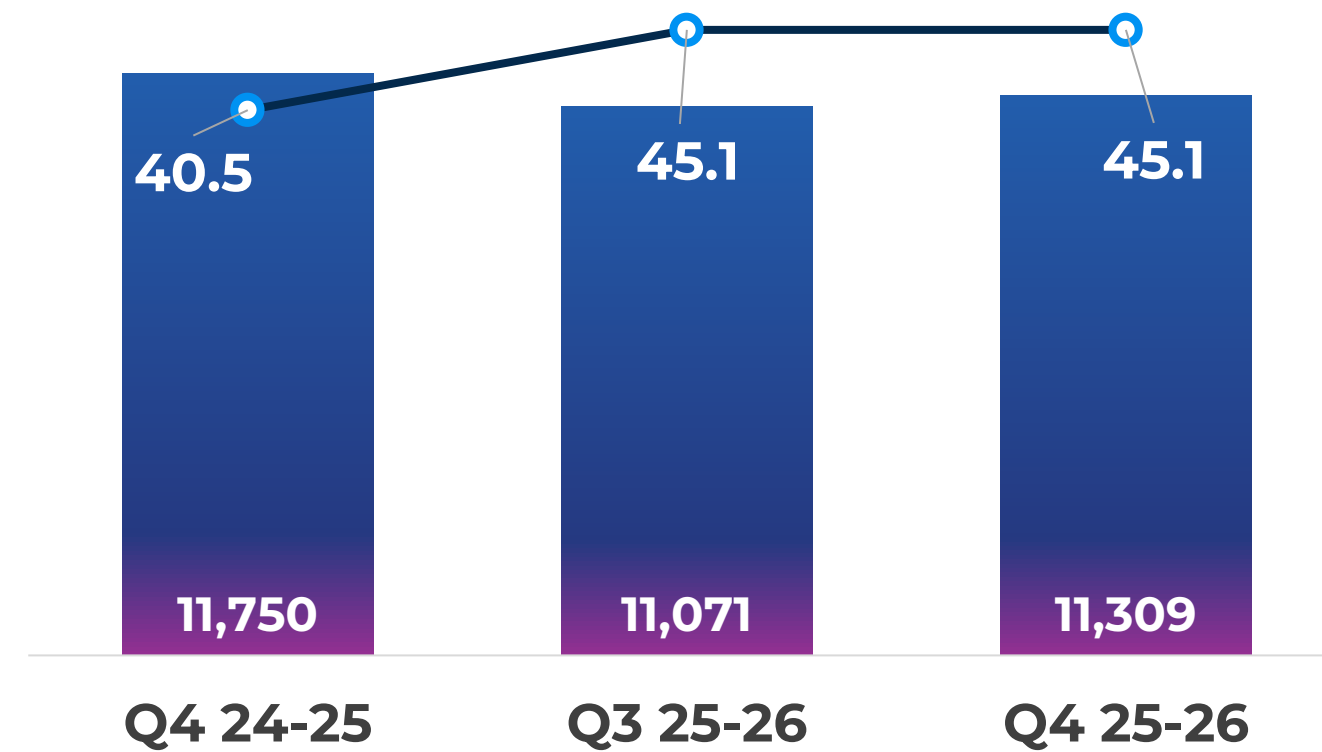


# **Financial** Highlights

# Analysis of Q4 FY 25-26 Performance



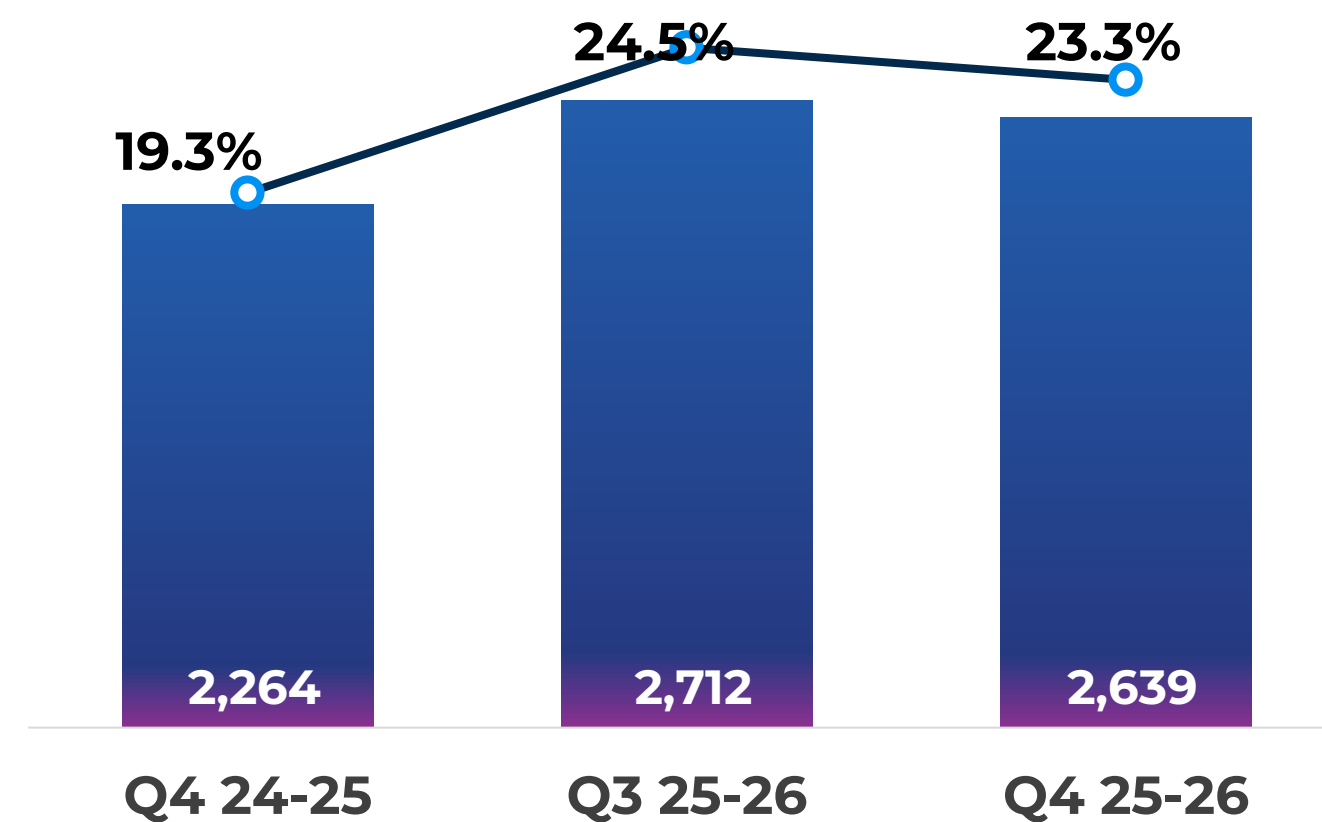
## Revenue (in ₹ mn) & Billable Transactions (# bn)



### Q4 25-26 revenue performance

- Revenue increased by **2.2% Q-o-Q**, and decreased by **3.8% Y-o-Y**
- Sustained Q3 25-26 revenue momentum in Q4 25-26
- Strategic focus on domestic markets (primarily India) driving revenue growth

## Gross Profit (In ₹ mn) & Gross Profit Margin (%)



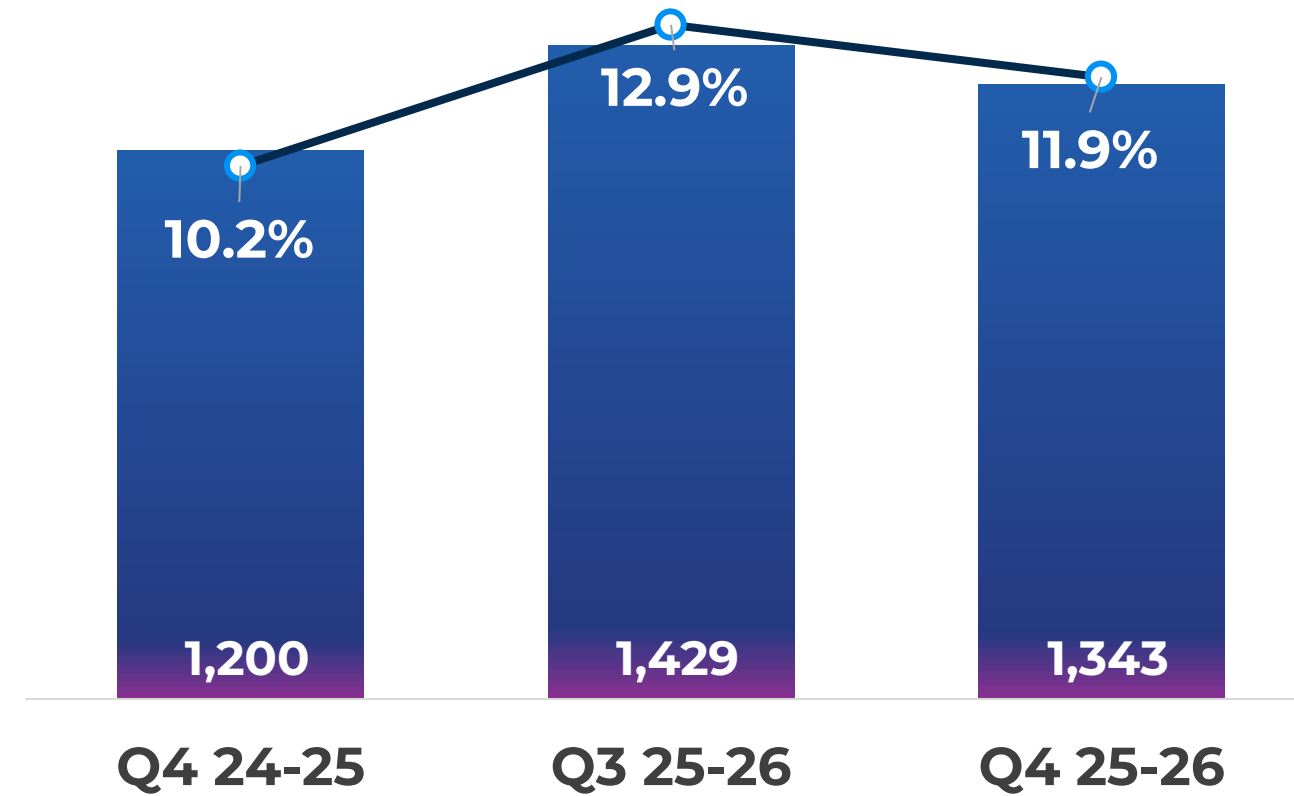
### Trends in Gross Profit

- Gross Profit increased by **16.6% Y-o-Y** and decreased by **2.7% Q-o-Q**
- Gross Profit Margin is **23.3% in Q4 25-26** vs. **24.5% in Q3 25-26** as against **19.3% in Q4 24-25**
- **Y-o-Y Gross margin expansion reflects increased focus on regional business**
- Focus on retention of higher margin traffic from existing customer
- Enhanced routing strategy delivering higher gross profit margins.
- Slight moderation in relatively lower gross profit ILDO business

# Analysis of Q4 FY 25-26 Performance (continued)



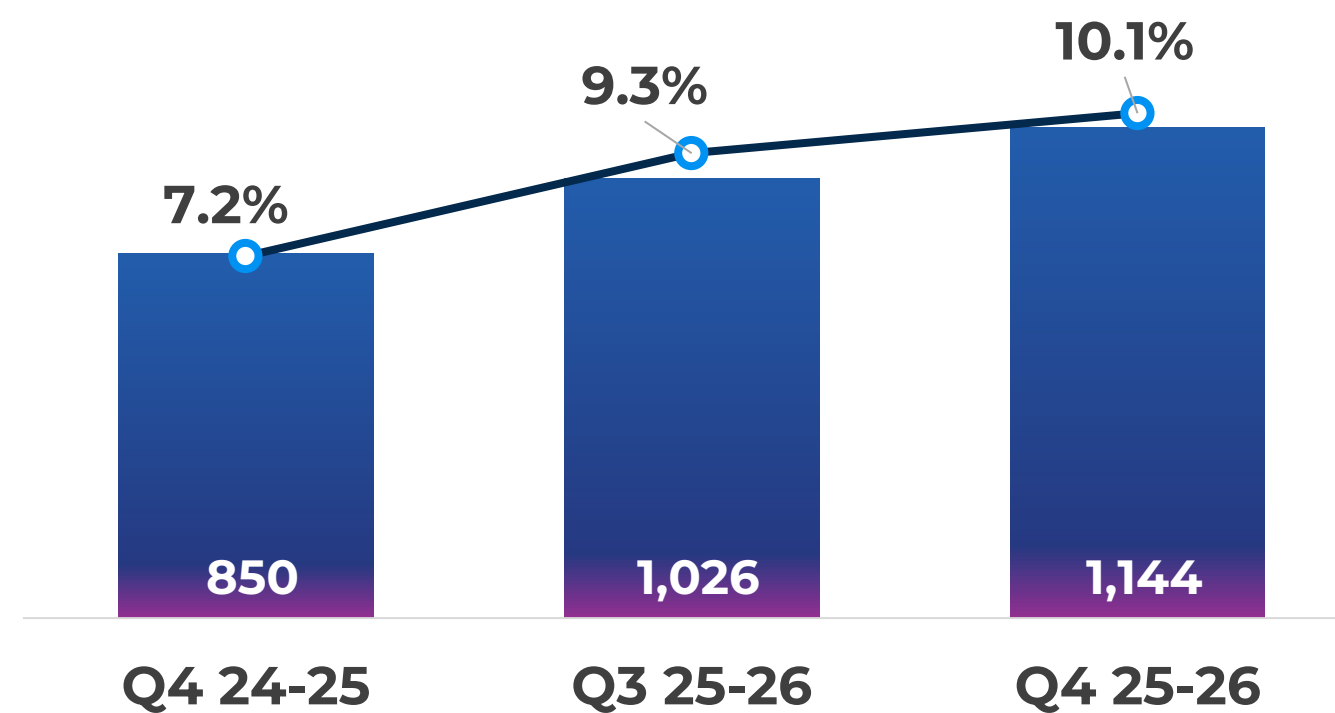
## Adj. EBITDA<sup>(1)</sup> (In ₹ mn) & Adj. EBITDA Margin (%)



### Adj. EBITDA analysis

- Adj. EBITDA decreased by **6.0% Q-o-Q** and increased by **11.9% Y-o-Y**
- The changes in Gross Profit flowed through to Adj. EBITDA
- Increase in operating cost, adjusted for non-core items<sup>(2)</sup>, by **+10% Y-o-Y** due to salary increments and certain trade receivables written off

## Adj. PAT (In ₹ mn) & Adj. PAT Margin (%)



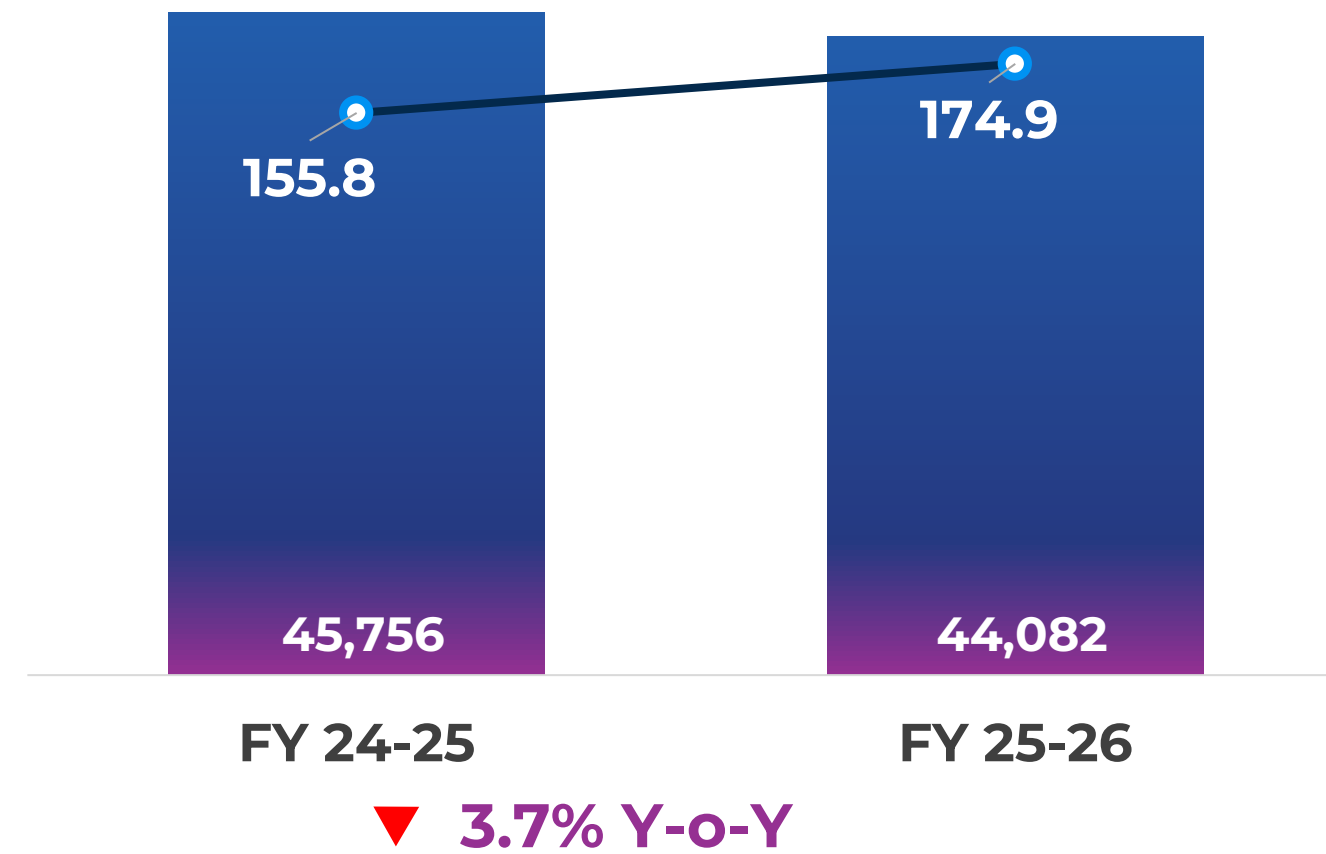
### Adj. PAT analysis

- Adj. PAT increased by **11.6% Q-o-Q** and by **34.6% Y-o-Y**.
- Adj. PAT excludes exceptional items and includes Forex gain of INR 181.5 mn in Q4 25-26 and forex gain of INR 36.2mn in Q3 25-26 as against loss of 8.3 mn in Q4 24-25. Refer Slide 14 for calculation of Adj. PAT

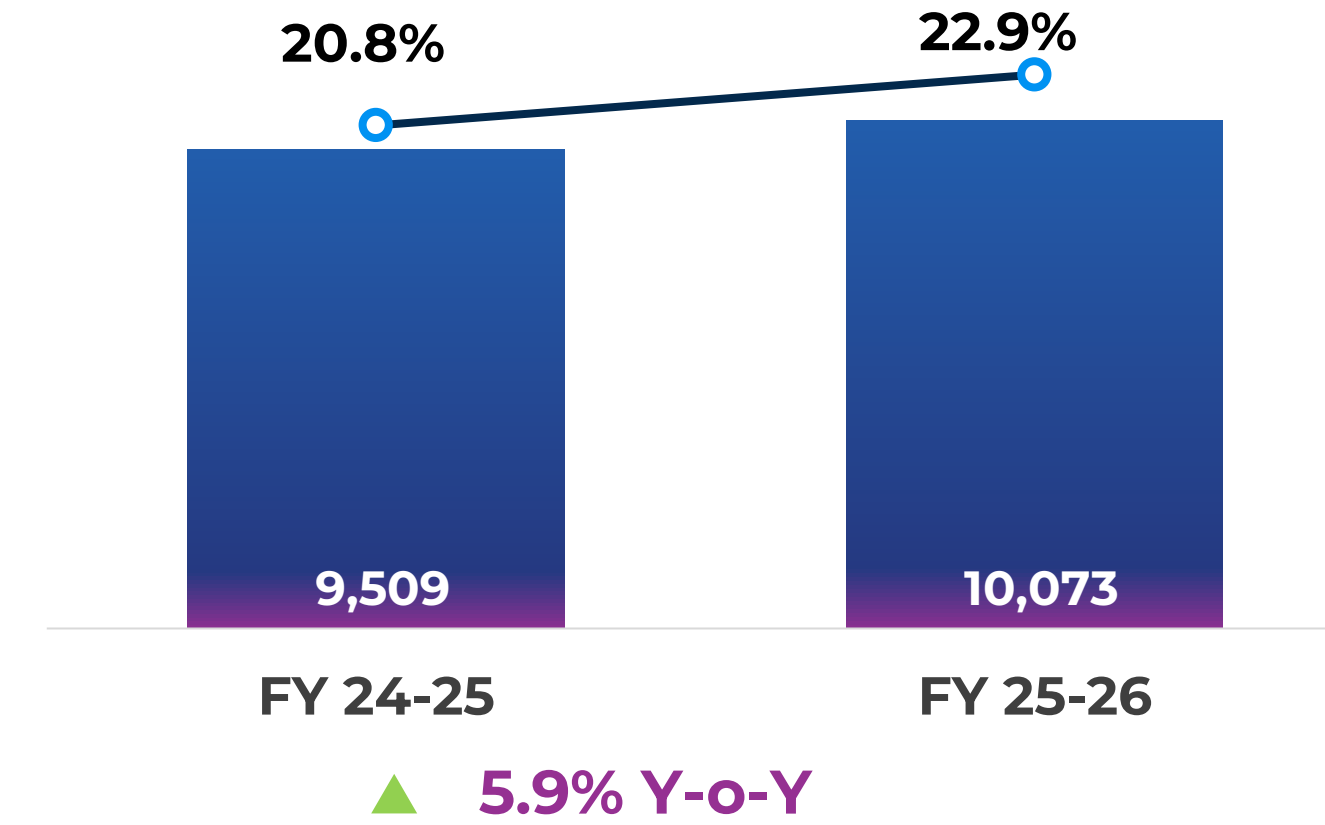
# FY 25-26 Performance



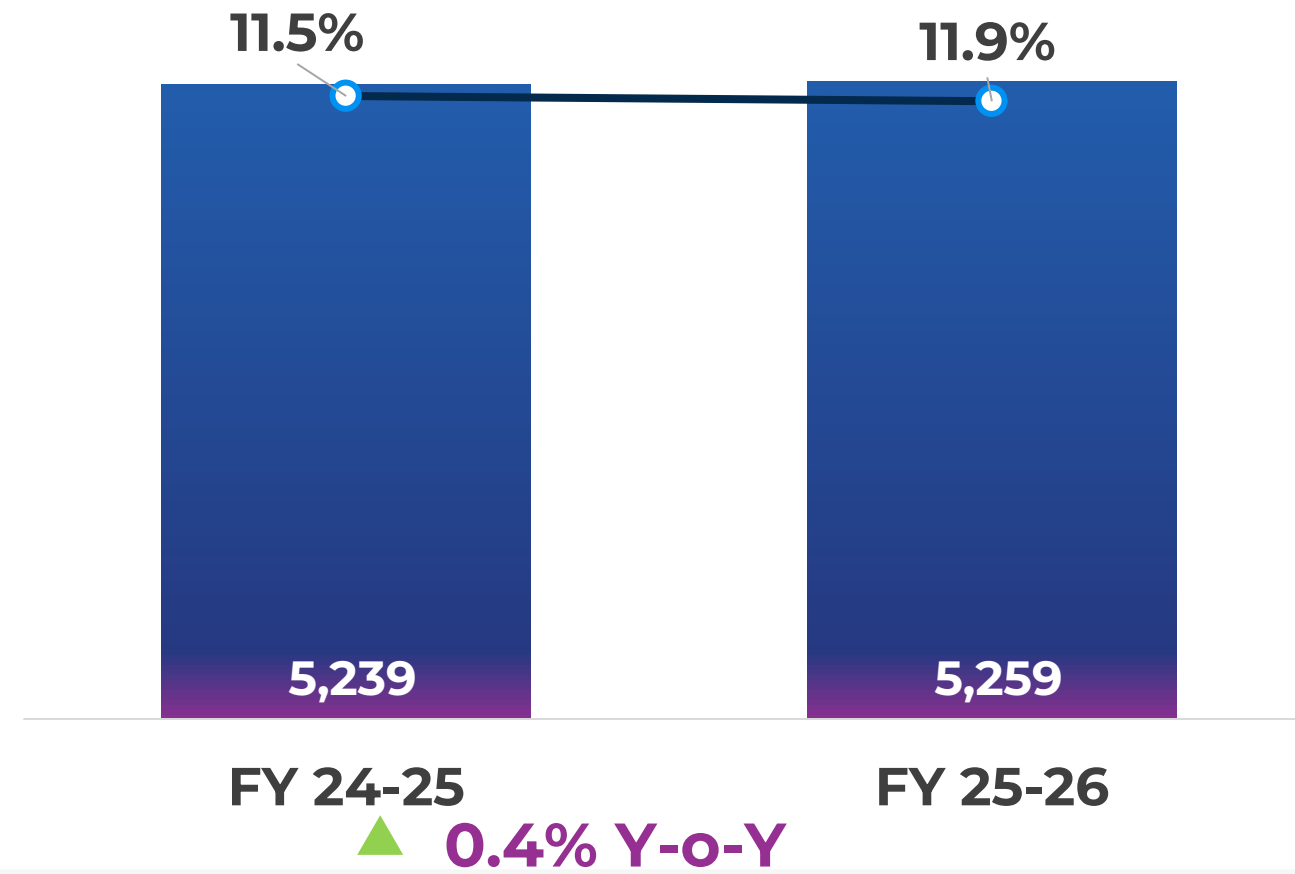
### Revenue (in ₹ mn) & Billable Transactions (# bn)



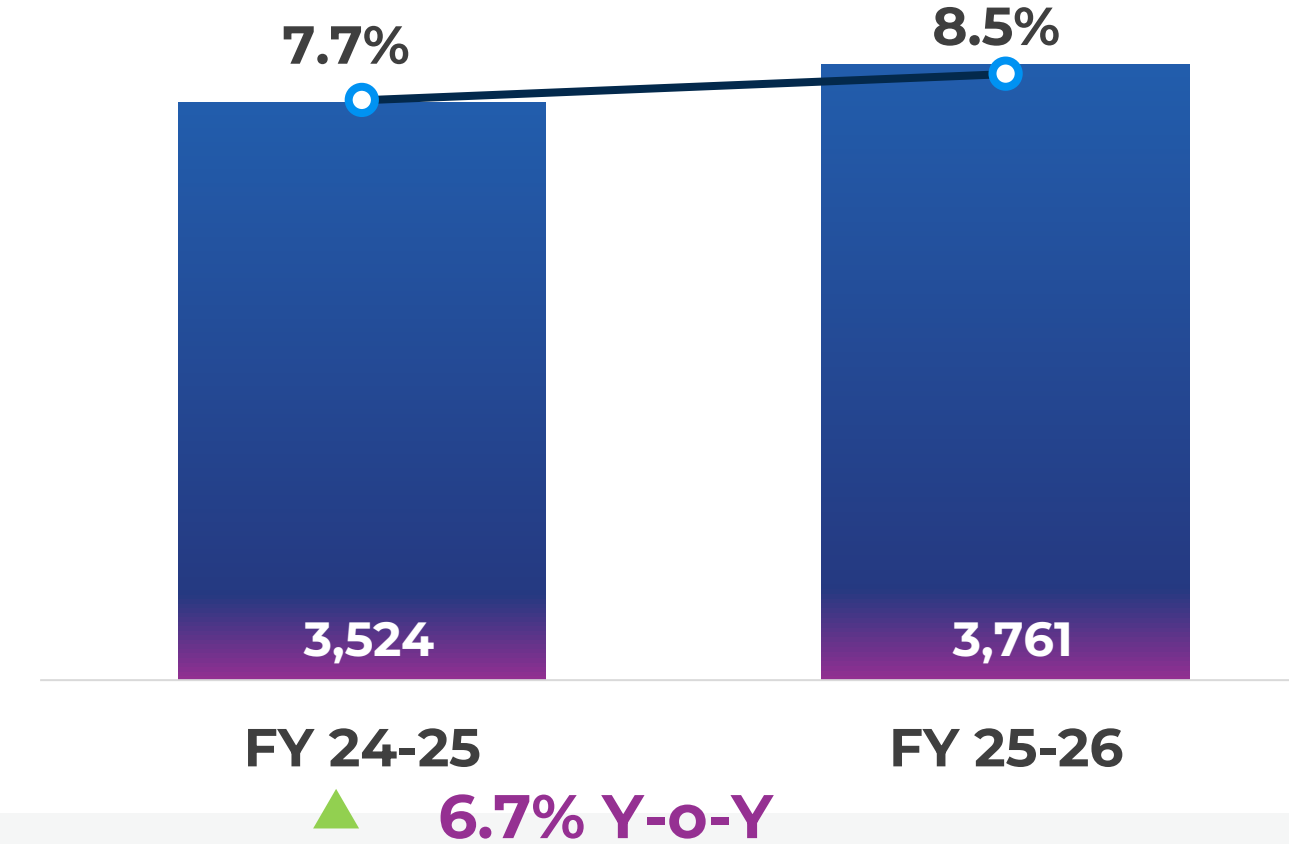
### Gross Profit (In ₹ mn) & Gross Profit Margin (%)



### Adj. EBITDA<sup>(1)</sup> (In ₹ mn) & Adj. EBITDA Margin (%)



### Adj. PAT<sup>(2)</sup> (In ₹ mn) & Adj. PAT Margin (%)



# Adjusted EBITDA/PAT



(In ₹ mn)	Quarter Ended			Twelve Months	
	31.03.2026	31.12.2025	31.03.2025	31.03.2026	31.03.2025
<b>EBITDA</b>	<b>1,362.3</b>	<b>1,463.9</b>	<b>1,219.0</b>	<b>5,372.5</b>	<b>5,277.6</b>
(+) Employee stock option expense (non cash)	-	(1.4)	5.6	10.1	31.1
(+) Net loss on foreign currency transactions and translation	-	-	8.3	-	-
(-) Intangible assets under development	19.3	33.3	32.5	123.5	108.2
(+) Non-cash impact related to refundable security deposit provided to MNO	-	-	-	-	38.8
<b>Adjusted EBITDA (Non-GAAP)</b>	<b>1,343.0</b>	<b>1,429.2</b>	<b>1,200.4</b>	<b>5,259.1</b>	<b>5,239.3</b>
<b>EBITDA margin % on a Non-GAAP basis</b>	<b>11.9%</b>	<b>12.9%</b>	<b>10.2%</b>	<b>11.9%</b>	<b>11.5%</b>

(In ₹ mn)	Quarter Ended			Twelve Months	
	31.03.2026	31.12.2025	31.03.2025	31.03.2026	31.03.2025
<b>Reported PAT</b>	<b>1,144.3</b>	<b>1,025.6</b>	<b>602.8</b>	<b>2,569.4</b>	<b>3,339.3</b>
(+) Exceptional Item	-	-	247.3	1,358.7	184.5
(-) Tax Impact on above	-	-	-	166.9	-
<b>Adjusted PAT</b>	<b>1,144.3</b>	<b>1,025.6</b>	<b>850.1</b>	<b>3,761.2</b>	<b>3,523.8</b>

(1) EBITDA = Profit before exceptional item minus (-) Other income plus (+) Finance cost and depreciation..

Management uses the non-GAAP financial information, collectively, to evaluate its ongoing operations and for internal planning and forecasting purposes. Non-GAAP financial information is presented for supplemental informational purposes only, should not be considered a substitute for financial information presented in accordance with Indian Accounting Standard (Ind AS), and may be different from similarly titled non-GAAP measures used by other companies.

# Cash Flow Conversion

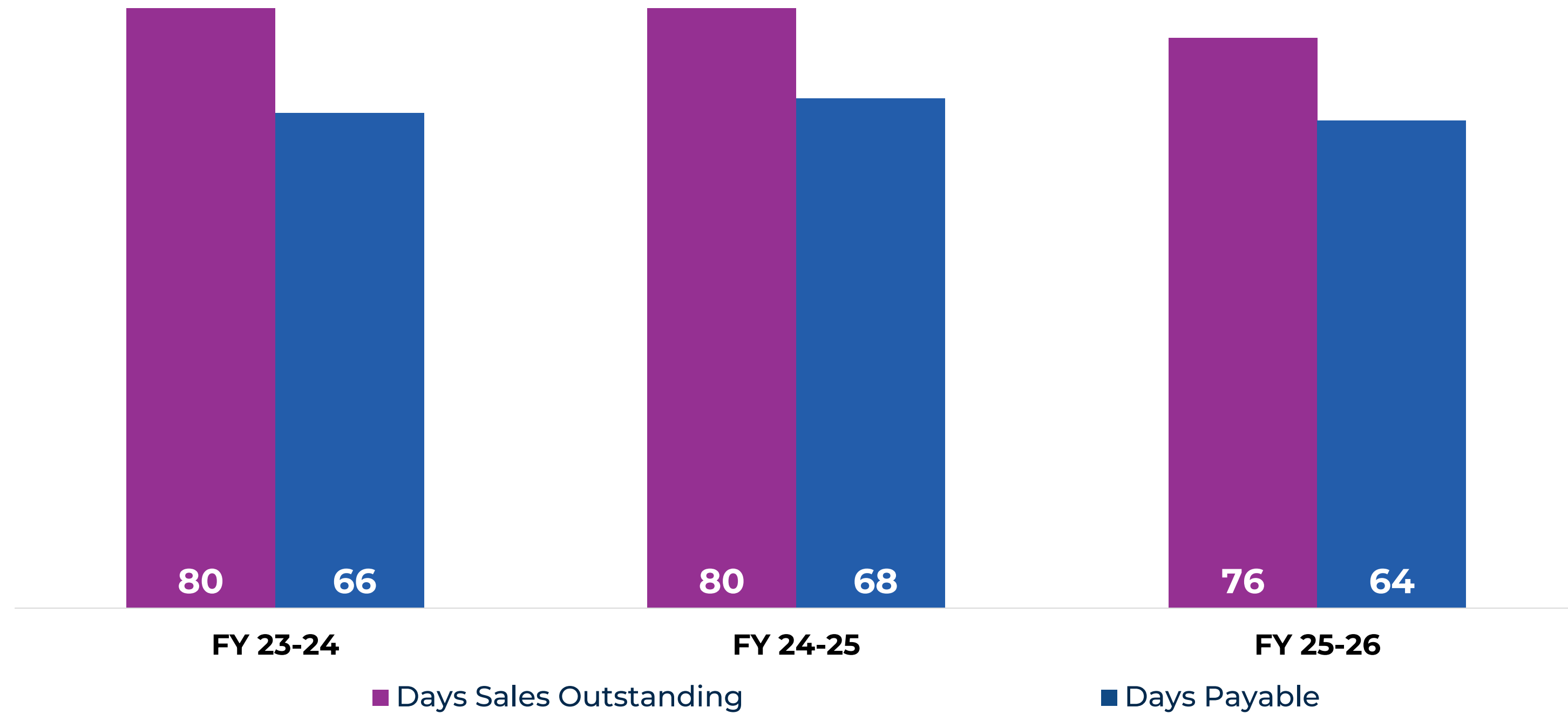


Cash flow (in ₹ million)	FY 25-26	FY 24-25
<b>Profit before tax (Ind AS)</b>	<b>3,530.5</b>	<b>4,261.0</b>
Adjustments for non-cash and non operating items	2,202.5	1,316.1
Adjustments for working capital		
Decrease/ (increase) in trade receivables	83.8	1,279.9
Decrease/ (increase) in financial assets and other assets	2,263.0	110.7
Increase/(decrease) in trade payables, provisions and other liabilities	(978.0)	41.3
Direct taxes paid (net)	(1,290.1)	(984.5)
<b>Net Cash generated from Operation Activities (Ind AS)</b>	<b>5,811.6</b>	<b>6,024.8</b>
<b>Adjusted EBITDA</b>	<b>5,259.1</b>	<b>5,239.3</b>
<b>CFO/EBITDA</b>	<b>110.5%</b>	<b>114.9%</b>

# Working Capital Trend



Working Capital Trend



Trade Receivables as on Mar 31, 2026 ₹ 9,094 mn

Trade Receivables as on Mar 31, 2025 ₹ 9,327 mn

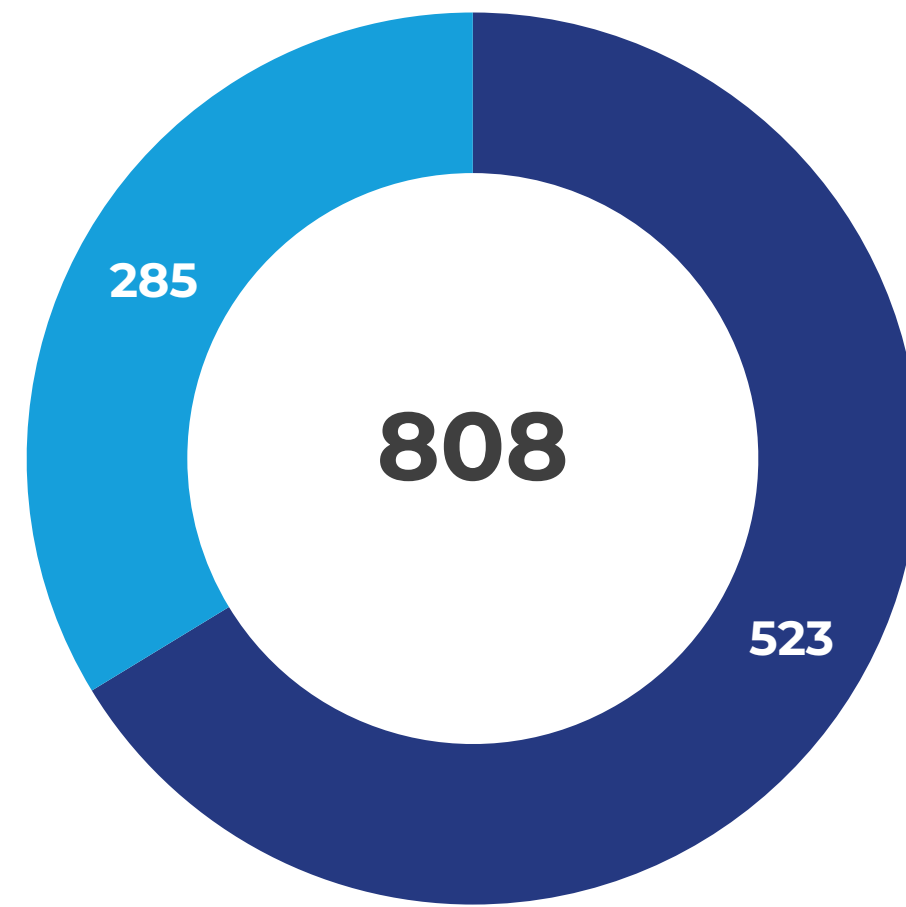
Trade Payables as on Mar 31, 2026: ₹ 4,968 mn

Trade Payables as on Mar 31, 2025 ₹ 6,844 mn

# Human Resource Capital



Location wise break-up

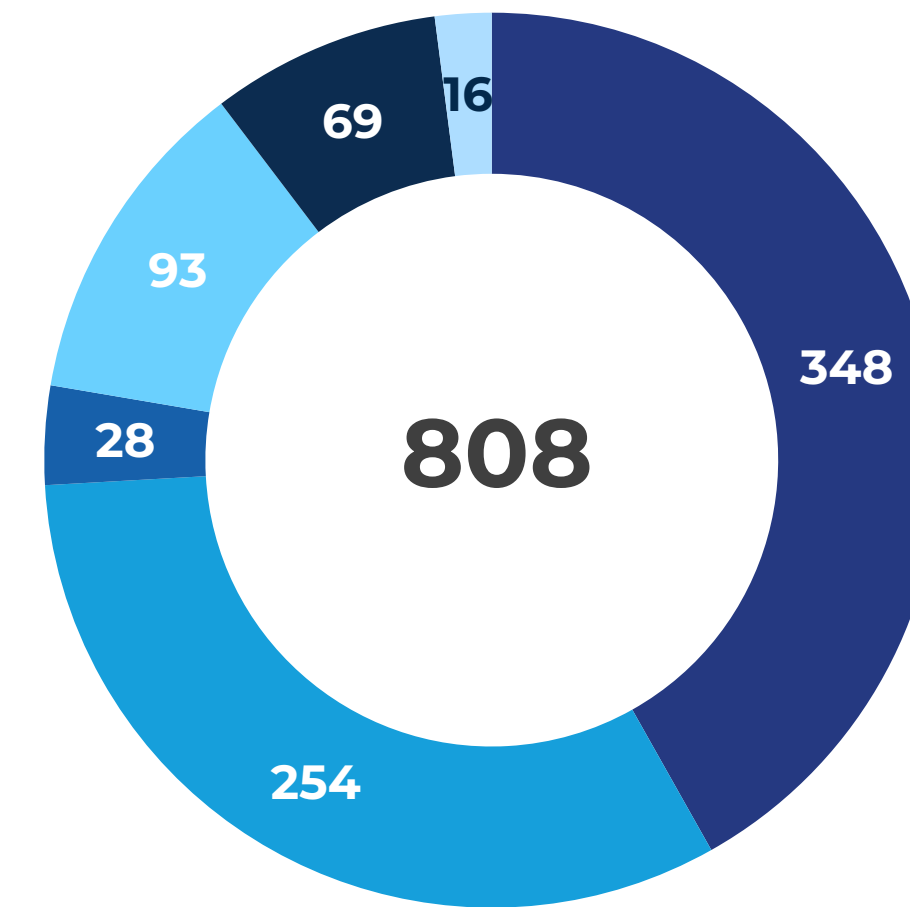


■ India ■ International

**52** New Employees joined in **Q4 FY25-26**

**28** Employees left in **Q4 FY25-26**

Function wise break-up



■ Tech & Tech Support  
■ Sales & Marketing  
■ Firewall & other operator solutions  
■ General & Admin  
■ Strategy, Accounts & Finance  
■ Corporate-Business Heads

*As on Mar 31, 2026, Employee information excludes Call2Connect*



# Thank You

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[www.routemobile.com](http://www.routemobile.com)

