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Date : May 29, 2026

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Sub: Transcript of the Conference Call with Analysts/Investors in respect of the Audited Financial Results (Standalone & Consolidated) of the Company for the quarter and Financial Year ended March 31, 2026

Dear Sir/Madam,

In accordance with Regulation 30 read with Part A of Schedule III of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, as amended, please find enclosed the transcript of the Conference Call held with Analysts/Investors on Wednesday, May 27, 2026, subsequent to the declaration of the Audited Financial Results (Standalone and Consolidated) of Omnitech Engineering Limited for the quarter and financial year ended March 31, 2026.

The said transcript is also available on the Company's website at:
<https://omnitecheng.com/notices-announcements-2025-26/>

This is for your information and records. Thanking you,

Yours faithfully

For Omnitech Engineering Limited

Bhoomi Manharbhai Vadhavana
Company Secretary & Compliance Officer
Membership No. ACS-54468

(Encl.: As above)

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(Formerly known as Omnitech Engineering Private Limited)

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**“Omnitech Engineering Limited
Q4 FY’26 Earnings Conference Call”**

May 27, 2026



**MANAGEMENT: MR. UDAYKUMAR PAREKH – CHAIRMAN &
MANAGING DIRECTOR, OMNITECH ENGINEERING
LIMITED
MR. PARAS PAREKH – WHOLE-TIME DIRECTOR &
CHIEF FINANCIAL OFFICER, OMNITECH ENGINEERING
LIMITED
MR. BHAVIN ACHARYA – CHIEF REVENUE OFFICER,
OMNITECH ENGINEERING LIMITED**

**MODERATOR: MR. VAIBHAV SHAH – EQUIRUS SECURITIES PRIVATE
LIMITED**



*Omnitech Engineering Limited
Dated : May 27, 2026*

Moderator: Ladies and gentlemen, good day and welcome to Omnitech Engineering Limited Q4 and FY26 Earnings Conference Call hosted by Equirus Securities.

As a reminder, all participants' lines will be in the listen-only mode and there will be an opportunity for you to ask questions after the presentation concludes. Should you need assistance during the conference call, please signal an operator by pressing "*" then "0" on your touchtone phone.

Please note that this conference is being recorded. I now hand the conference over to Mr. Vaibhav Shah from Equirus Securities. Thank you and over to you, sir.

Vaibhav Shah: Hi good evening, everyone. On behalf of Equirus Securities, I welcome you to the Q4 and Full Year FY26 Earnings Conference Call of Omnitech Engineering Limited.

We are pleased to have with us Management represented by Mr. Udaykumar Parekh – Chairman and Managing Director, Mr. Paras Parekh – Chief Financial Officer and Mr. Bhavin Acharya – Chief Revenue Officer.

I will now hand over the call to the Management Team for their "Opening Remarks" which will be followed by a question-and-answer session. Thank you and over to you. Uday, sir.

Udaykumar Parekh: Yes, good evening everyone and very warm welcome to all of you. Thank you for joining the Omnitech Engineering Earnings Calls for the Q4 and Financial Year ended 31st March 2026. I am Uday Parekh – Chairman and Managing Director of Omnitech Engineering. Thank you for joining the call.

Along with me, Mr. Paras – whole-time Director and CFO and Bhavin Acharya who is our CRO. We hope you have had an opportunity to review our Investor Presentation uploaded on the Stock Exchange and on our Company's website.

During this call, we will discuss the financial performance for the Quarter 4 and Financial Year Ended March 31st, 2026 along with the business development across the key verticals, order book position and operational growth initiative.

FY26 marks another significant milestone in the Omnitech continuous growth journey, reinforcing our consistent growth trajectory and execution-led business model. During the year, company has delivered healthy growth in the revenue along with profitability, significantly expanded our manufacturing capability and strengthened our order book across the key strategic sectors.



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We have deepened our engagement with the global OEMs through significant qualifications driven and high-value engineering programs, further validating our technical capability and customer trust.

Growth and execution continue to remain the cornerstone of our strategy. Our focus is on building a scalable manufacturing capability, strengthening long-term customer partnerships and enhancing operational excellence to drive sustainable growth.

With the disciplined execution, continuous capacity expansion and strong customer-centric approach, we remain well-positioned to create long-term value for all the stakeholders.

With this background, I would now request to Paras to take through you “Financial Performance” in the detail.

Thank you everyone.

Paras Parekh:

Yes, thank you Udaybhai. Good evening, everyone. Thank you for joining Omnitech's Earnings Call for the Quarter and Financial Year Ended March 31st, 2026.

So, let me take you through the financial highlights for Q4 and FY26 on the consolidated basis:

If we go for the FY26 year-on-year, our revenue grew 49.1% to INR 511.3 crores. EBITDA rose 45.4% to INR 171.1 crores. Profit before tax nearly doubled up to 92% to Rs. 107.8 crores. Profit after tax increased to 80.9% to INR 79.3 crores with a PAT margin improved to 15.5% from 12.8% last year.

These results underscore the resilience of our business model and effectiveness of our growth strategy.

If we go for the quarterly performance, we continue to deliver strong momentum. Revenue grew 38.5% to INR 148.7 crores. EBITDA increased to 15.9% to INR 49.7 crores. PAT rose 43.4% to INR 29.3 crores with margin holding steady at 19.7%.

This consistent quarterly performance demonstrate our ability to sustain growth while investing in capacity innovations.

Now, if we see for our balance sheet, it remains robust. Net debt-to-equity improved to 0.34x in FY26 from 1.6x in FY25, reflects strong cash generations and prudent capital management. Our return on capital employed (ROCE), was healthy at 13.7%, while return on equity (ROE), stood at 11.7%.



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Additionally, our GST credit stood at INR 24.3 crores as on April 26, which is expected to realize in this financial year, supporting our future cash flow and increasing liquidity in the system. We continue to prioritize disciplined capital allocations, balancing growth investments with shareholders' returns.

Now, let me provide some context on our key ratios:

If we go for the ROE, ROE stood 11.7% from 21.6% last year. This was primarily due to a sharpened increase in equity base, which expanded from INR 203 crores to INR 679 crores, which was through IPO proceeds.

While profit grew strongly, the larger capital base diluted ROE. This reflects our conscious efforts to strengthen the balance sheet and reduce leverage risk.

If we go for the ROCE, ROCE moderated slightly to 13.7% from 16.1%. Since the decline is again caused by the sharp increase in our equity base as mentioned before. These investments are strategic, meant to capacity expansion, and we expect ROCE to improve as this asset begins contributing fully to revenue.

For the net working capital base, let me address the working capital positions in detail:

The increase in working capital base to INR 294 is elevated, and I would like to explain the key drivers behind it as well as the actions underway to improve it.

The increase in inventory days is primarily linked to the initial ramp-up of our new programs, where Minimum Order Quantity, which is MOQ, commitments with our key material supplies led to higher inventory build-up. This should be viewed as a strategic investment to support future growth and customer executions rather than inventory stagnation. Our receivable day is at 153 on a consolidated basis but largely influenced by our strong Q4 revenue concentrations.

A significant portion of revenue was billed during February and March, and these receivables remain with contractual credit terms and are already progressing through our collection cycles.

On the liability side, the payable days improved from 64 days to 80 days during the year, supported by our great vendors, their recognition, and a stronger supply chain alignment. Going forward, we remain focused on optimizing working capital by the end of this financial year through three specific levers:

- Inventory rationalizations.
- Normalizations of receivable cycles.
- Continued payable optimizations through disciplined executions and operational planning.



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In overall view, if we see that FY26 has been a landmark year for Omnitech Engineering Limited. We have delivered strong financial results, improved profitability, and strengthened our balance sheet. Our investments in capacities and working capital position us for sustain growth. We are confident in creating a long-term value for our shareholders.

With this background, I will now request Bhavin Bhai to take you through the business updates. Thank you. Thank you all.

Bhavin Acharya:

Thank you, Paras Bhai. Good evening, everyone.

Let me take you through the business update, our revenue mix, the pipeline across new segments, and the growth visibility we are seeing ahead.

Our financial year ended on 31st March. Our revenue profile remained well diversified. Energy contributed 53%. Motion control and automation contributed around 25%. Industrial equipment contributed around 16%, and others contributed around 6%.

Even in geographical location-wise, North America contributed 53%, India contributed 24%, Asia contributed 19%, and Europe and UK contributed around 4%.

This reinforces the export-led nature of our business while also showing a healthy spread across end markets and geographies.

The key message is that the pipeline is widening and several OEM relationships in our priority verticals are moving from qualification stage into the engagement stage. The order book, as on 25th May 2026, more than INR 3,000 crores of order book has been indicated, and a strong order book flow is going on.

Opportunity pipeline continues to be robust. Omnitech's existing plants at Metoda and Chhapara have been certified for Aerospace AS9100, and we have also initiated NADCAP Certification process for surface treatment, NDT, and welding, marking another important milestone to get into the aerospace sector. There are already four FA development orders being received, marking a key step forward in defense and aerospace segments.

In FY27, three concurrent initiatives will underpin the forward strategy. This is of:

1. Commissioning a new manufacturing facility in Hyderabad.
2. Expanding operation at a proposed new facility at Chhapara.
3. Implementing a solar roofing at the existing Chhapara plant.

These initiatives are intended to support future-scale manufacturing resilience and operating efficiencies.



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Our order book continues to be one of the clearest indicators of growth visibility. It has grown from INR 57 crores in FY23 to INR 83 crores in FY24, to INR 283 crores in FY25, and now to around INR 3,000 crores as of May 25, 2026. Importantly, this includes the multi-year Weatherford order, which is more than INR 900 crores.

The order book mix is currently led by Energy at 74%, followed by Motion and Automation at 14%, and Industrial Equipment is standing at around 12%.

If we look at the geography-wise mix, North America is contributing around 64%, Asia is around 34%, India is around 1.5%, and Europe and UK is around 0.5%. We believe the combination of a stronger order book, capacity expansion and working capital availability places us in a good position to continue scaling the business.

And for those who have joined us newly, I will quickly give an overview of Omnitech:

That we have been in business since last 19 years, that is our operating history, with over 256 global customers, sales in 24 countries, and about 75% of our revenues coming from outside India. Our order book stands today at around INR 3,000 crores plus, and we operate from manufacturing facilities with an annualized capacity of 26 lakhs hours and growing steadily. And the precision capability is up to 5 microns.

So, our growth journey in FY26 has been remarkable. We believe the combination of stronger performance, a significant expanded order book, growing capabilities, and disciplined execution gives Omnitech a strong platform for the next phase of growth.

On behalf of the entire Omnitech team, I would like to thank you very much for the support and confidence you have shown.

We will now be happy to take your questions. Thank you.

Moderator:

Thank you very much, sir. We will now begin the question-and-answer session. Ladies and gentlemen, we will wait for a moment while the question queue assembles. First question is from the line of Pranay Roop Chatterjee from Burman Capital Management. Please go ahead.

Pranay Roop Chatterjee:

Hi, my first question is specific to the total opportunity within oil and gas. So, what I have been struggling with is to quantify the total opportunity available for a player like you in India. I understand the story of geopolitical supply chain de-risking and China Plus One. But while all that is great and the numbers are in billions of dollars, that is the market size, I think that addressable or given the capacity constraints and the technology constraints and the slow nature of getting new certifications, building new capabilities, the opportunity is actually capped at a much lower level in my sense. But what I have not been able to do is quantify it. So, if you can help me with a few data points and I am sure you guys will track it. For the oil and gas services

players like Schlumberger, Weatherford and Halliburton, what would be the total annual procurement from India for precision machine components? Like I have a number, but I thought I would just ask. And where can this number go in the next three to four years? Because the feedback I received is that while the global procurement is massive, there is a technological cap to how much can be shifted to India because of the ecosystem of raw materials being non-existent. So, if you can just throw some color and if you can quantify the total opportunity as it stands today.

Bhavin Acharya:

Let me answer. So, when we talk about the addressable market, yes, you are very right. The addressable market, the headroom is extremely high. And the numbers are basically in billions, right? On global spans, what they have on different markets, different geographical locations, and so on and so forth. Now, to give you a quantified number, it is a bit difficult because having said that, we need to assess different capabilities, different geographical locations, and so on. Now, when we talk about particularly India going forward, the kind of headroom, what they have given us, because these some of the numbers are not divulged officially, or some of the numbers are not given directly by the companies like SLB. But there are 'n' number of customers and SLB, Weatherford, Halliburton, are just some of the customers. There are many more companies, be it in the system, like NOV or TechnipFMC, or mid-level players who are already in the system and in the market, who also have this policy of giving the business in India. In relation to the capabilities, I feel that India is today more or less ready to support and to give. Say, for example, if I talk about Omnitech, Omnitech has the complete capability from machining to surface treatment, to giving them sub-assemblies and assemblies today. So, when we talk in a specific criteria of capabilities, at least I can talk from my standpoint that Omnitech can deliver the kind of product line what they would require. So, having said that, to give a quantification of any numbers, it is very difficult, because those numbers are technically not there yet. But kind of business, coming to India and what it will come going forward as well, because of the geopolitical situation, because of US expanding, because of Venezuela coming in, there is a lot of opportunity within the oil and gas, which will be going forward. If you look at the market size and the market requirements, there is a very, very good potential going forward. So, that's where we are.

Pranay Roop Chatterjee:

Sir my second question is also in light of the massive oil and gas order book that you have. Now, obviously, given your current scale, the order book is massive, and I can imagine how difficult it must be to get all the things in place, expand your capacities, then execute the orders. The quality requirements are pretty high. You need to ensure in terms of deliveries are timely. So, from a perspective of FY27, which is literally the next four quarters, what is your priority? And is it to focus on executing what you have in the order book, or will you also be going out and looking for further opportunities? Because if I were to think, obviously, you have announced Hyderabad as a new location, but in Rajkot, I am sure it would be tough to attract and retain a large number of top talent or other technical staff who know about oil and gas. So, I am not sure if you are facing any challenges in respect to that. But what is the near-term parity? Is it first

execute the book and then think about getting new orders or you have everything sorted and getting new orders is not a challenge anymore?

Bhavin Acharya:

No. So, first of all, there are no challenges at all. I will tell you why. Business is available. Yes, you are right that business can be captured as much as you want, but then the execution and there might be certain challenges. So, if you see our growth trajectory, we have taken orders, then we felt that we are capable enough to take the orders and we would be able to deliver and execute those orders. Now, if we talk about particularly two, three things, what you have addressed in one question, one is the Rajkot base. See, Rajkot has one of the largest machine tool companies and the complete ecosystem in relation to forging, castings, and even machining within Rajkot. So, the skill set available in Rajkot is extremely good, to be honest with you. Having Hyderabad as a location that is a second subject and that is a separate matter in relation to expanding geographical base, being closer to the customer and those kind of aspects. So, it has nothing to do with the skill set of the people because in Rajkot, we have extremely skilled people and also people, we are very diverse enough where people from different geographical locations are also moving to Rajkot and being part of Omnitech. So, that aspect is also well taken care of. And when we talk about executing of this large size orders, see, we have taken these orders on a conscious basis that it's not a kind of a spot business, it is a five-year long program where we have given them a kind of a ramping up timeline that how much we are going to do it this year, how much we are going to do it next year, and we are going to gradually grow into that executing and completing those five-year timeline as to we are not going to complete entire INR 200 crores today. So, it's going to be relatively say INR 50 crores, then INR 100 crores, then maybe INR 200 crores, then 300 crores, and so on and so forth. So, I am just giving you a brief assumption numbers, but it's going to be a gradual ramp up. And that is taken into account with the customer, giving them the confidence that this is how we are going to invest in new capabilities. This is how we are going to invest in the new machineries. And this is how we are going to ramp up the programs. So, it's all been taken care of accordingly.

Udaykumar Parekh:

And adding to one point we are open to take more orders based on the value propositions where we want to head it out. See, on the value proposition side, like assembly, testing, and two steps of more product lines. So, we are already working with the customers to add more value-added product into the basket. So, we are consciously executing this order book but parallelly working for acquiring the strategic order book, which we are planning to execute in the furthermore years.

Bhavin Acharya:

And one more thing I would like to add over here, that if you look at the Investor Presentation as well, you will see that we have also opened up with new customer base in new industry segments as well. So, we are working on different areas also simultaneously and ensuring that we bring in new customers on board as well.

Pranay Roop Chatterjee:

Got it, sir. Is it possible to chip in one question or should I go back into the queue?



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Moderator: Please go ahead.

Pranay Roop Chatterjee: So, actually, my third question was what you are already addressing, which is outside of oil and gas. You mentioned aerospace, you are doing qualifications, and I think Oshkosh is already a client, and you are present in the ground support equipment space. As investors, how should we look at aerospace for you? Where are you in the journey? For example, oil and gas, I would say you are probably early but maturing stage, where you have an order book, customers have approved you, and it's all about scaling up and building on the momentum you already have. When do you think you would have similar momentum in, let's say, aerospace or any other segment like you have in oil and gas right now?

Bhavin Acharya: Sir, when we talk about oil and gas, I would say probably we are one of the most mature business houses today in relation to our peers. So, that is where we are as far as oil and gas is concerned. But however, aerospace is concerned, we are relatively fairly scaling up. Yes, in airport ground support system, we are very strong because we have been working with these customers for a very long time. But when we talk about aerospace in particular, more in detail, then yes, we are building our capabilities, building our ecosystem, and we are pretty sure that the way we are headed and the way we are in discussion with certain clientele, you will see definite growth in the coming years.

Udaykumar Parekh: So, if you see the capability metric of the aerospace and defense of the peers, and if you see our capability metric in terms of size of the compounds, in terms of the like a 5-6 machining, in terms of the surface treatment, in terms of the NDTs, in terms of the infrastructure availability at already ready at Omnitech. So, if you see, there will be the capability requirement, there will be some certification requirement, and there will be talent requirement, which can understand that type of forms and everything. So, you can say we are in a good position into that sector also. But yes, we should have enough capacity to execute parallelly everything. So, we are going step by step over there.

Pranay Roop Chatterjee: Got it, sir. Sir, I have covered all my questions. I think you guys have done a phenomenal job and getting INR 2000 crore worth of orders from global giants is not a joke. So, I think all I can say is all the very best in terms of executing and winning more such orders. Thank you, sir.

Moderator: Thank you. Thank you. Next question is from the line of Nirvana Laha from Badrinath Holdings. Please go ahead.

Nirvana Laha: Yes, good evening. Thanks for the opportunity. My first question is on the Weatherford Master Purchase Agreement that you announced in March. So, this is still a master purchase agreement, right? The client has given you a schedule of proposed orders. These are not confirmed yet. So, if you can help us understand like this INR 184 crore per year schedule, how tentative is this?

And is there a possibility of deferment or cancellation of orders? And when is the execution about to start?

Udaykumar Parekh: So, let me take that. You know, like, see, Weatherford is already our existing customer. And these types of master purchase agreement and master supply agreements, like customers work on the long agreements with their end customer like Aramco, ADNOC, Petrobras and similar like that. So, based on those orders, they book their supply chain for certain suppliers. So, that is the one repeated effect of the order with us. But apart from that we are already existing customers, like we are already working with Weatherford. So, based on their yearly requirement and based on their quarterly requirement, it is going to be executed. Yes, there will be some ramp up time, first year, second year, third year, fourth year and fifth year can be mature. So, this is the order type.

Nirvana Laha: Sure. So, just to understand how should we think of the ramp up, you have announced a INR 900 crore NPA, how should we think of the ramp up from FY27, FY28, if you can guide on some numbers that will be helpful.

Udaykumar Parekh: See, some information is more confidential. So, as you know, these are the all the American and these types of customers. But you can say, just an example, roughly INR 900 crores and 5 years is a program. So, maybe 70% on first year, second year, 85% and similarly, it will go like that.

Nirvana Laha: Okay, got it. And in the DRHP, sir, you have announced another almost INR 1000 crore order that you have received also from an oilfield service company, I think. So, if you can give us some details on this, when does that order start? Is it also an MPA? And is it with Schlumberger? I am just guessing. So, if you can give some more details on that, and when can we see the revenue starting? Is it FY27 or will it be FY28?

Udaykumar Parekh: No, it will be starting from FY27. So, that is also similar in nature. Let me give you another more context. When they get more larger order, they have to book their supply chain, because at the end their customers, there is a commitment to deliver that is in the 5 years, 10 years to the Petrobras or any of the customers. So, similarly, there is a requirement for the material also to fulfill their end customer product and services and everything. So, all this program is going to start from FY27. Some product line can be starting this year, some product line can be initiated in the early beginning of FY28.

Nirvana Laha: Got it. And are either of these orders linked to Middle East end clients? And do you see any possibility of disturbances because of what has happened in the Middle East recently?

Udaykumar Parekh: Yes, there may be some of the portion can be linked because see, these are more or less that they are governed from the US headquarters. So, basically, sometimes we do not know on the third year where it is going to go and like that. But see, till today, crossing the fingers we do not have

an overall challenge on any of the Middle East supplies except one or two small challenges of the delay of the shipment, transit time or something like that. And these customers, if you can understand they operate more than 100 countries if you go on their websites and everything, they operate in a very wide area of geography and everything.

Nirvana Laha: Sure, sure. Sir, one question on your CAPEX. So, as per the DRHP, you were bringing up two facilities in Rajkot itself. Now, today in the presentation, you have mentioned about a new facility in Hyderabad. So, few questions on this. First, if you can help us understand these two big oilfield orders, are these new Rajkot capacities linked to the oilfield order execution or do we already have enough capacity to execute these orders? And secondly, this Hyderabad facility, what is this about? And when are these facilities going to get commissioned, all these three facilities now that we have announced?

Udaykumar Parekh: So, Hyderabad is basically leased property and it's, you can say, being more closer to the defense side of the customers and other customers over there. These are pretty small units to give the extra more comfort to the customers. So, we have a good enough capacity at our existing plant and along with the IPO proceeds, we are also building up two facilities in the Chhapra. So, there is enough capacity for the execution of the order and from next year, after the Q1, our new facility will also start ramping up.

Nirvana Laha: Got it, sir. Final question, sir, from my side. What kind of growth are you looking forward to given the large order book that you have in FY27? And in Q4, we saw a sharp gross margin compression, about 450 basis points against the last two quarters. So, if you can comment on whether this is a one-time thing and whether margins will revert back to the earlier margins that we were reporting in the last two, three quarters and in terms of passing through prices, right, like steel, etc., the prices are going up, what kind of arrangements do we have with our customers? Are we able to pass on prices immediately? So, two questions, one on growth for FY27 and second on margin.

Paras Parekh: See, hi, this is Paras. If you will see about the growth, then growth will be as per previous years. If you see the historical, in historical last four, five years, it is between 30 to 35% of growth. So, we are looking at similar growth in this year also.

Udaykumar Parekh: See, our order book is a very strong order book. We have this year of growth capacity is also there. So, we are anticipating good growth this year. And also coming years, we are also investing on the new capacity for the further years.

Nirvana Laha: Sure. And the question on margin?

Paras Parekh: Yes, margin will be similar as per the historical.

- Nirvana Laha:** Okay. So, this quarter was an aberration, right? We will go back to better margins from further quarter?
- Udaykumar Parekh:** Yes. Actually, as we are in the growth journey, so many of the costs we have already started incurring in the Q4 and end of the Q3 and like that, because FY27 is also our growth trajectories, and everything. So, many of the costs we have already started incurring and that is going to be give the result in FY27. So, we have to keep on investing on certain resources, people, key talents, you know.
- Nirvana Laha:** Got it. Thanks a lot. Congratulations on the great results and all the best.
- Moderator:** Thank you. Next question is from the line of Santhosh from Ithought PMS. Please go ahead.
- Santhosh:** So, I did have one question on the existing facility. So, in case we have been able to grow our capacity year-on-year, let's say by 40% or 50%. So, how much more can we get out of this existing capacity?
- Udaykumar Parekh:** Can you repeat once? Sorry.
- Santhosh:** Okay. So, we have been able to grow the existing capacity by 40% year-on-year. So, how much more can you get out of this existing capacity?
- Udaykumar Parekh:** See, normally without expansions also FY27 is overall covered with a very few bottleneck machines can be invested. But overall, we have to plan at least in the year ahead of our execution. So, we are overall covered with FY27 and near to FY28 only for Q1 and Q2. And by that time, we are also building up the new capacity. So, that has to be hand-in-hand to build the capacity. So, if you ask like until the new capacity comes, we will have good enough capacity to execute the growth for the FY27 and early FY28.
- Santhosh:** So, you also procure the land for additional capacity beyond FY28. So, do you have any numbers in mind like how much capacity you want to put up in the next five years apart from the proposed capacity?
- Udaykumar Parekh:** See, yes, we have acquired a new land in Ahmedabad for our future trajectories of the growth. Because beyond FY28-29, we may need to have one more geographical location to support our customers and attract the talent and everything. So, this growth will always remain in the target. So, we have to keep on investing in certain things in the early stage whenever it is available. So, there will be the good numbers because if you see the comparison of the size from the DRHPs, what are our existing capacities square meters, what are new. So, you can find some ballpark numbers or something like this. This is the high-level numbers. But there is a growth trajectory over there also.



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- Santhosh:** So, apart from this big order from Weatherford and other clients, which is INR 1000 crores, how much of the order books actually repeatable from this? Do you have any difficulty on that front?
- Udaykumar Parekh:** So, overall, roughly motion control and automation and industrial equipments are short order cycle of the customers, like they place the order before three months, four months, and similar like that, because of the nature of the industries. So, over more than 90% revenue comes from the repeated customer base. So, this order book, apart from the repeated customers, historically, if you see our numbers of last two, three years, we have a pretty good repeated customer base. And how we calculate the repeated revenue, if we add a new customer this year, this year is the new customer. But next year, if we do the same customer, same product line or same revenue with that customer, we will consider it as a repeated revenue customer. So, that is also pretty significant, more than 90% of the motion control and automation and industrial equipment side of customer base.
- Santhosh:** Understood. But my question was more on the additions to order book. Let's say, you have around INR 400 crores orders of order book in motion control right now. So, how much of this is exactly repeatable in the next year or the next-to-next year?
- Bhavin Acharya:** No, so there are two things in this. One is what Uday Bhai mentioned that we have repeat customers. So, these customers which are already we have are giving us repeat business and that is what we are working on. In addition to that, we are already having new customer base which is being added into motion control industrial equipment in ongoing year. So, those are the new customers which probably are at the FA level stage, or we are being onboarded onto them. So, you will see those customers coming in next year or year after next as we go forward. So, that will keep on adding as far as the customer base is concerned.
- Moderator:** Thank you. Next question is from the line of Nikhil from Torowealth Managers. Please go ahead.
- Nikhil:** Yes, hi. So, just wanted to understand Weatherford at say full ramp up, we had probably said that it will be around INR 250 crores to INR 300 crores of an annual run rate. What kind of EBITDA margins would be embedded in this contract if you are okay to share?
- Udaykumar Parekh:** So, this is a very common platform. So, we will not be able to share that. But we have overall policies like average of the EBITDA we are trying to quote across the customer base, probably 1% or 2% up and down. But this is just the average of our customer base.
- Nikhil:** Okay. No worries, sir. And second question is, sir, on the development orders, which we probably mentioned for defense and aerospace, without probably naming the customer, what a tier of the customer they are and what component category like these orders are for aerospace and with respect to the raw materials, would you be machining Inconel, titanium, super alloys, like this time to understand more on the perspective with respect to the orders that be disclosed?



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- Bhavin Acharya:** Yes. So, it is a combination of both. It is Tier-1 as well as the OEM. And we would be doing different material grades, particularly on the aluminum side, a little bit more. And then, of course, relatively material grades of titanium as well. And in addition to that, there are some stainless-steel materials as well. And those would be different machine components for different applications, as well as a little bit of, I would say, subassemblies. So, there would be some welding portion as well, as well as some subassemblies in relation to the requirements. So, it is a combination of couple of things.
- Udaykumar Parekh:** So, apart from that, there is some SLB and just for Inconel and titanium, we do machine the Inconel, titanium and aluminum, a lot of into oil and gas industries and like that. So, we have quite a good range of machines who can machine the Inconel and titanium. So, our capability is already ready for the defense segment for handling titanium and Inconel.
- Nikhil:** Okay. All right. And sir, just last one I wanted to understand what kind of revenues can we expect, like in maybe say '27-28 from the aerospace vertical?
- Bhavin Acharya:** So, at the moment, we would keep it at what you are seeing right now in the growth level. Because this has a long cycle time and long lead times in getting the FA approved, getting the process aligned. So, to give you some kind of number today would be really difficult, but we are headed in the right way in the right direction. And I am pretty confident that you will see some good numbers, even in FY27 going forward, but that we will see in coming months and coming quarters.
- Udaykumar Parekh:** So, adding to that last year also we have executed some FAs and the revenue has been already booked in the last year. So, this year also expecting good growth into these segments.
- Nikhil:** Got it, sir. And sir, just last one, if I can, what kind of risk to our scalability do we see probably we have got good visibility on the energy as well as now on the aerospace front also. Anything that probably can deter our growth or probably deter our scalability in the coming two to three years?
- Udaykumar Parekh:** See, we are anticipating and we are working on the execution plan, roughly around (+30%) and how can we try to grow (+/-5%) is like that. But we are like, see, we have order book, we have capacity, we have a very strong relationship with customers. The program has already been approved, or samples have been approved or lifecycle test or everything has been completed. So, more or less we are projecting to grow with good numbers of the growth trajectory for the next coming years. And FY28 onwards, we are also adding the new capacity where the capacity can be a bottleneck for the growth beyond FY29 or something like that. And we have around 2.6 million number of hours with the new capacity will be around more than 4 million number of machine hours that will allow us to grow our capacity, apart from that our existing plant and existing some of the installations, we have a very good enough spare capacity, because to build

the capacity, it takes some time. That time, reasonably, we have already covered up in FY26. So, we are projecting good growth in FY27, FY28 and beyond that also. Adding to that we are also adding more segments like aerospace and defense and that will be also giving the more growth leverage in the coming years.

Nikhil: Wish you all the best. I will come back in the queue.

Moderator: Thank you. Thank you. Next question is from the line of Darshil Jhaveri from Crown Capital, please go ahead.

Darshil Jhaveri: Thank you so much for taking my question. Firstly, congratulations on the great set of results. So, sir, just wanted to understand our industry, are we able to pass through the raw material cost easily, or some lag we get the price escalation. Can you comment on that? Because due to the recent geopolitical conditions, are we impacted somehow like in terms of either deliveries or this in terms of pricing, sir?

Bhavin Acharya: Okay, so when we talk about passing of raw materials, that is a very given in our line of business. So, usually it is considered that whatever there is an increase or impact on any situation that we passed on, particularly if we even talk about the logistic side of it, most of the business, what we do is all ex works. So, automatically certain risks and factors have already been accounted by the customer on this kind of geopolitical event, in the event of raw material pricing, and so on, that is also very much passed through. So, this is all it's going on and this industry *per se* for everyone, it is more or less the same. So, it is well in line.

Darshil Jhaveri: Okay, that's really great to hear, sir. And I just wanted to understand in terms of seasonality of our business. So, is H1 a bit lower and like, what could we expect like that, sir? Is H2 higher execution period? What do you feel, sir?

Udaykumar Parekh: If you see, overall, there is you can say, (+/-5%) to (+/-10%) of that type. Like December is a yearend for the export customers, sometimes they are on the lower inventory. So, probably October or November, but again, that will go by November to January. So, if you see, roughly, there is no seasonality quarter-on-quarter.

Darshil Jhaveri: Okay. That's fair enough, sir. And I just wanted to understand in terms of our exports to North America was such great. So, even in a year where tariffs were imposed on us, we have done such a great number. So, going forward, like, we can have even better growth out there, because even that part will not be a constraint on our customers. So, can we do better than the 30%-35% growth that we were we are expecting? Can it push towards 40%-45% in the coming years, sir?

Bhavin Acharya: So, see, during the tariff also, there was not a major impact as far as our sales was concerned to US. And overall, if you look at the market as well, the market size is definitely very, very big. And we have been doing pretty substantial in US. But likewise, we are also working our way



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into Europe, UK and other regions as well, on how to scale that business and how to make sure that we diversify ourselves into different industries. But nevertheless, US has been a good driver, and we are working on it to ensure that whatever we can capitalize, and these are all precision product lines. So, even for customers, it is not that easy to change over. So, they will have to stick to us, there is a very high stickiness of these customers. And we will have to continue doing what we do. So, we definitely see that US will play a decent and good role for us.

Darshil Jhaveri: Okay. So, just like in terms of revenue growth, why I was just asking if you have done better in the past, that's the only reason that we are asking you and FY26 has been much better than 30%. So, just wanted to understand with certain stickiness of order book, as well as the new approvals that we are going for. So, we can have a higher growth, right? Even if you don't want to quantify it with a number, but in terms of just pure this, we can have a better growth, right?

Udaykumar Parekh: Yes. So, see, there is a headroom to have better growth. So, obviously, our present plant have, this is a very high level, 750, 800 and more based on the material mix and everything. And additionally, we are adding another 1.5 million of the machining hours that will give us some more capacity for FY29 onwards. So, the headroom is good and these customers, if you consider like, there are more than 30-35 billion of individual customers, if you their total put together is more than 100 billion of customers, I am talking only oil and gas. But in energy, we have also included oil and gas and some of the non-oil and gas like we have some other energy customers also includes in the energy division. So, there is very good demand in that segment and everything, order book is already full. So, there is a very good headroom for more growth.

Darshil Jhaveri: Okay, that's it from my side. Thank you so much, all the best.

Moderator: Thank you so much. Next question is from the line of Shiladitya, an Individual Investor. Please go ahead.

Shiladitya: Thanks for the opportunity. So, regarding one question on the growth we are comparing to the last investor. So, as I understand and you explained, the order book is very large compared to our current revenues and also the capacity is there. So, basically, what I want to understand is what is kind of stopping us from growing faster and that is the question. And then on the margin side, there is a big drop. So, can you explain a little bit more on why the 5% to 6% drop in margin happened?

Udaykumar Parekh: See, roughly, if you see in last three years, just a high level, like 178, 180 to 500 plus, we have done in these two, three years of the growth and we are anticipating a good growth in the coming year so that is overall on the growth. In terms of the margin when we are investing heavily, like if you see our interest and many of the costs which have been already incurring in the FY26 and we have to keep on investing on the new capability investment, if you see what level of the capability we have developed, what level of the first article we have done in the last two, three

years, especially in the FY26. So, that is giving more results for the growth beyond FY27. So, that expense has been already accounted for into the P&L and everything. So, on average, we are in the range of 30% to 35% of the EBITDAs and like that. So, that is the overall guidance presently.

Shiladitya: So, shall we assume around 30% to 35% going forward as annual basis, is that a fair assumption?

Udaykumar Parekh: So, see, we are targeting that, we are working on that.

Paras Parekh: So, yes, we are following the same as we were following the historical base, the same we are planning for the next few years also.

Shiladitya: And basically, what you are saying is that growth can be more than 30%, you are kind of taking that as a base rate, right?

Udaykumar Parekh: Yes, we are also targeting this similar type.

Shiladitya: Thank you.

Moderator: Next question is from the line of Aman Vij from Astute Investment Management. Please go ahead.

Aman Vij: Good evening, sir. Just two questions from my side. First, the contracts we have with Weatherford and one more customer which is multi-year contract. Could you give a rough estimate in terms of components versus assembly? What is the mix for both these customers individually?

Udaykumar Parekh: So, this is a very public domain. So, we may not be able to declare that. But there are good numbers in the assembly portion also in one of the orders one of the around INR 1000 crores of orders. And for that, we are already investing on 17,000 PSI over pressure testing and everything..

Aman Vij: But rough range will be in my understanding Weatherford is mostly component while the other contract may, there is a good portion of assembly. Is this understanding correct?

Udaykumar Parekh: Yes, it can be. But see, now we are almost more on the higher side of the value chain. So, if we are giving all the subcomponents to the customers, they have to add only one additional top level BOM part number to take from the assembly. First, they can move to the kitting of the product, and then they move to the assembly. So, our goal is to move towards the more value proposition.

Aman Vij: Second question is, are we also looking in on adding more such contracts, multi-year contracts, maybe like you have done two already, but there are two, three, Tier-1 and lot more Tier-2



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customers available. So, do you think in next one to two years, we will add at least one or two more such multi-year contracts?

Udaykumar Parekh: Definitely, we are working. So, based on our capacity expansion and everything, we are working on the few another some large OEMs and similar getting that type of contract and everything. Not only in these segments but apart from that, our future strategy segment, which we have mentioned into our DRHP also, there also we are working significantly to get these types of some of the good contracts.

Aman Vij: Sure, sir. Final question. One final question is, in terms of, say, this actuator business, as well as this new vertical like defense and aerospace, in the next three years, where do you see this as a percentage of revenue, these two segments? Because the two contracts we have will also scale very fast, maybe faster than the other segments. So, can you paint a rough picture in the next three years? What can be the rough mix in terms of oil and gas versus defense and aerospace? And for you mentioned defense and aerospace, there are two, three mostly aerospace or do we have some big defense customer also, if you can clarify that?

Udaykumar Parekh: So, in the defense side, we have these customers on the defense side. Also, one order we have also in the export defense, because we have a very good network of our customers in many of the countries. So, we have got also the export defense order also. So, we are aiming for good growth in the aerospace and defense side. And if you see more about again, stretching to the capabilities, again to the certification, NADCAP is already in the process. And if you see our value propositions to the customer, like we handle up to a 10 meter of the jobs, we do a smaller to a large size of the product line. So, aerospace and defense side of customers are really going to get the good value from Omnitech. So, we are hoping for good growth, like it is very early to save some number. But you can say we are aiming for good growth in these segments also.

Aman Vij: Thanks for answering the question.

Moderator: Thank you. As there are no further questions from the participants, I now hand the conference over to the management for the closing comments.

Bhavin Acharya: So, thank you everyone for participating in today's Earning Call and for your continuous interest in Omnitech engineering. The company remains focused on discipline, education, capability enhancement, and long-term value creation. We sincerely appreciate the support and confidence extended by all our stakeholders. Thank you once again and we wish you a very good evening. Thank you everyone. Thank you.

Moderator: Thank you, sir. On behalf of Equirus Securities, that concludes this conference. Thank you all for joining us and you may now disconnect your lines.