



Date: May 18, 2026

To,

Corporate Relationship Department,
BSE Limited
2nd Floor, New Trading Wing,
Rotunda Building, P.J. Towers,
Dalal Street, Mumbai – 400 001

Scrip Code: 543746
ISIN: INE0BSU01018

Sub: Investor Presentation under Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015. ('LODR')

Dear Sir/Madam,

With reference to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find enclosed the **Investor Presentation on Audited Financial Results of the Company for the half year & year ended (H2 FY26 & FY26) March 31, 2026.**

The above information is also available on the website of the Company at www.logicainfoway.com.

You are requested to kindly take the above information on record and treat the same as compliance under the applicable provisions of the SEBI (LODR) Regulations, 2015.

Thanking you,
Yours faithfully,

For **LOGICA INFOWAY LIMITED**

Priyanka Gera
Company Secretary & Compliance Officer
Membership No. A63809

Encl.: as above

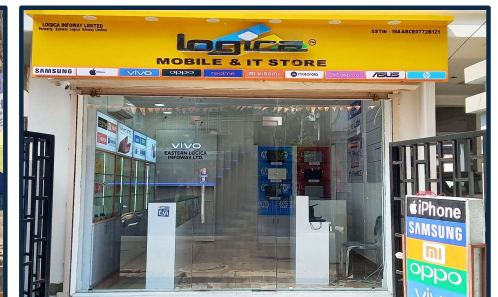
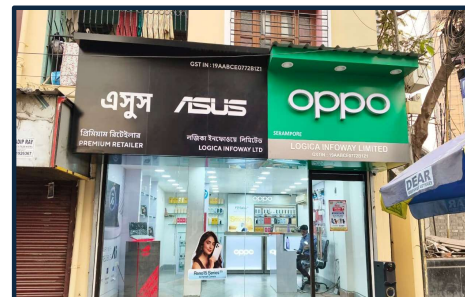
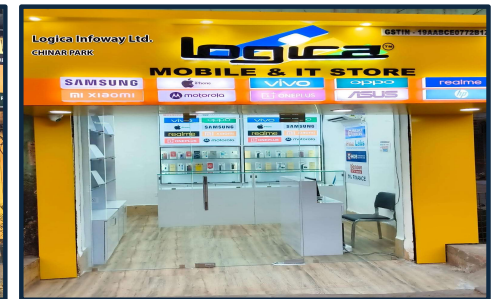
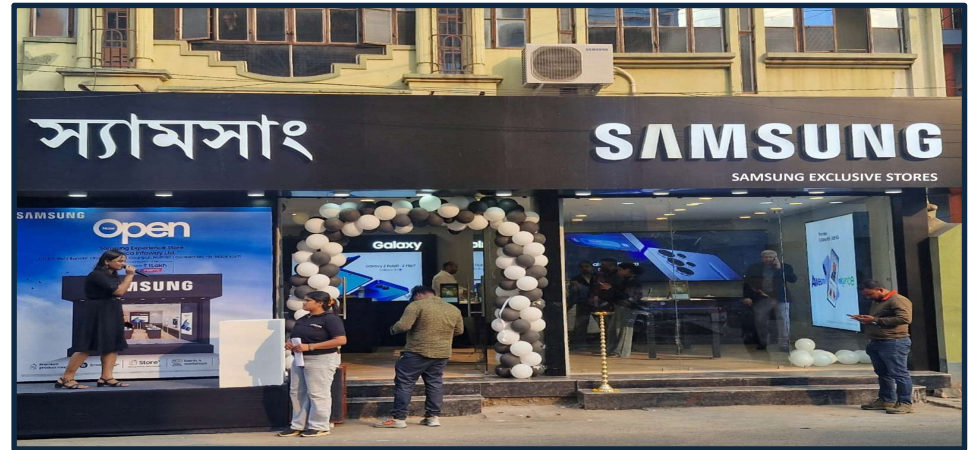


Earnings Presentation

H2 FY26 & Full-Year FY26

May 2026

BSE: 543746 | ISIN: INE0BSU01018





Forward-Looking Statements

Except for the historical information contained herein, statements in this presentation and the subsequent discussions, which include words or phrases such as "will", "aim", "will likely result", "would", "believe", "may", "expect", "will continue", "anticipate", "estimate", "intend", "plan", "contemplate", "seek to", "future", "objective", "goal", "likely", "project", "should", "potential", "will pursue" and similar expressions or variations of such expressions may constitute "forward-looking statements". These forward-looking statements involve several risks, uncertainties and other factors that could cause actual results to differ materially from those suggested by the forward-looking statements. These risks and uncertainties include but are not limited to our ability to successfully implement our strategy, our growth and expansion plans, obtain regulatory approvals, our provisioning policies, technological changes, investment and business income, cash flow projections, our exposure to market risks as well as other risks. Logica Infoway Limited does not undertake any obligation to update forward-looking statements to reflect events or circumstances after the date thereof.



FY26 Earnings Highlights *Highest Ever Revenue & Profitability*

Revenue from Operations

FY26 revenue of ₹13,157 Mn, up 17.6% YoY (FY25: ₹11,192 Mn) — ahead of 12–16% guidance. Growth driven by Retail (+60% YoY), the new Samsung Notebooks Tier-I mandate, exclusive Infinix distribution in Gurgaon and calibrated re-engagement of exports in H2.

Gross Margin

Highest Ever Gross margin expanded 28 bps to 5.91% (FY25: 5.63%). H2 FY26 gross margin of 6.30% — the highest half-yearly print in the Company's three-decade history — reflecting the mix shift to COCO retail (now 21% of revenue vs. 16% in FY25).

EBITDA & EBITDA Margin

EBITDA of ₹306 Mn, up 29.5% YoY (FY25: ₹236 Mn) — growing 1.7x faster than revenue, evidencing operating leverage from the expanded retail base. EBITDA margin at 2.32% expanded 21 bps YoY (FY25: 2.11%) despite absorbing pre-opex from 24 new stores opened during the year.

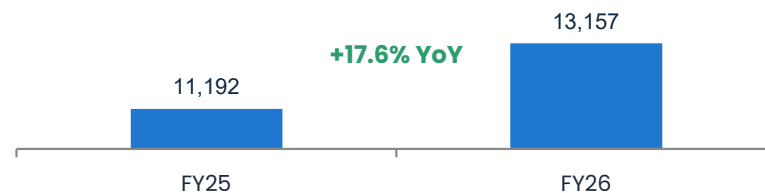
PAT & PAT Margin

PAT of ₹142 Mn, up 35.0% YoY (FY25: ₹105 Mn) — bottom-line growth ~2x revenue growth. PAT margin at 1.08% expanded 14 bps YoY (FY25: 0.94%), reflecting operating leverage flowing through despite higher finance costs.

Earnings Per Share

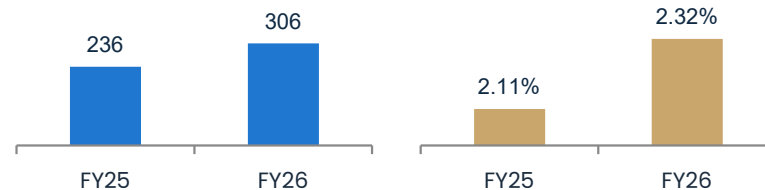
EPS of ₹7.97, up 30.2% YoY (FY25: ₹6.12) — three-decade high.

Revenue from Operations (₹ Mn)



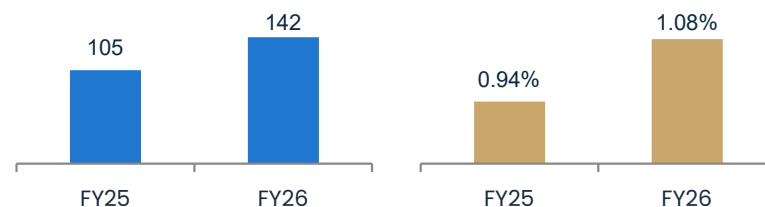
EBITDA (₹ Mn) & Margin (%)

+29.5% YoY | +21 bps margin expansion



PAT (₹ Mn) & Margin (%)

+35.0% YoY | +14 bps margin expansion





H2 FY26 Earnings Highlights *Record Half-Yearly Results*

Revenue from Operations

H2 FY26 revenue of ₹7,290 Mn, up 22.2% YoY (H2 FY25: ₹5,967 Mn) and 24.3% HoH (H1 FY26: ₹5,867 Mn) – strongest half-yearly print in Company history. Sequential acceleration reflects festive-quarter throughput, new mandate ramp-ups landing in H2, and re-engaged export volumes.

Gross Margin

H2 FY26 gross margin of 6.30% – highest half-yearly print on record, expanding +87 bps HoH from 5.43% in H1 FY26.

EBITDA & EBITDA Margin

EBITDA of ₹159.3 Mn, up 7.3% YoY and 8.8% HoH. EBITDA margin at 2.18% softened 31 bps YoY (H2 FY25: 2.49%) and 32 bps HoH (H1 FY26: 2.50%) – reflecting pre-opex absorption from new stores ramping below maturity revenue. Gross margin expansion partially offset the drag.

PAT & PAT Margin

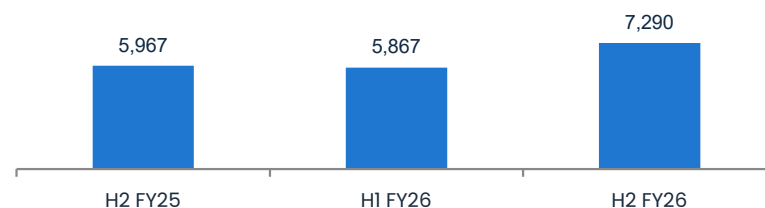
PAT of ₹77.6 Mn, up 6.7% YoY and 20.7% HoH. PAT margin at 1.06% softened 16 bps YoY (H2 FY25: 1.22%) on higher finance costs from working capital deployed in retail expansion.

Earnings Per Share

H2 FY26 EPS of ₹4.36, up 2.8% YoY (H2 FY25: ₹4.24).

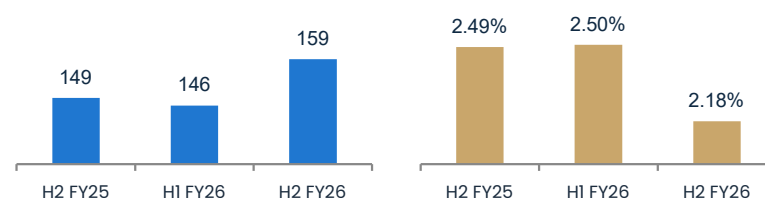
Revenue from Operations (₹ Mn)

+22.2% YoY | +24.3% HoH



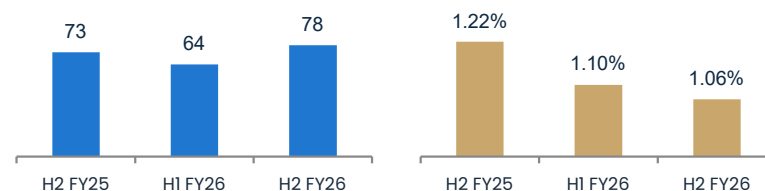
EBITDA (₹ Mn) & Margin (%)

+7.3% YoY | +8.8% HoH



PAT (₹ Mn) & Margin (%)

+6.7% YoY | +20.7% HoH





Gaurav Goel

Chairman cum Managing Director

Commenting on the performance for H2 FY26 and Full Year FY26, Mr Gaurav Goel, CMD, Logica Infoway Ltd, said:

"FY26 marks the best year in Logica's three-decade history – highest-ever revenue at ₹13,157 Mn (+17.6% YoY), EBITDA at ₹306 Mn (+29.5% YoY) and PAT at ₹142 Mn (+35.0% YoY) – comfortably ahead of the 12–16% revenue guidance we issued at the start of the year. Critically, our full-year gross margin expanded 28 bps to 5.91%, with H2 FY26 delivering 6.30% – the highest half-yearly gross margin in our history – a direct outcome of the deliberate mix shift toward higher-margin retail and curated e-commerce.

Retail remained the engine of growth, scaling 60% YoY to ₹2,780 Mn and now accounting for 21% of total revenue, up from 16% in FY25. We added 24 net new stores during the year, taking our COCO network from 53 to 77 stores and retail space from ~24,500 sq. ft. to over 38,000 sq. ft. Distribution was strengthened by the new Tier-I Samsung Notebooks mandate across West Bengal, Delhi-NCR, UP and Haryana, and the exclusive Infinix distribution in Gurgaon. Our migration from Tally to SAP Business One in April 2025 is already translating into tighter inventory control and sharper procurement.

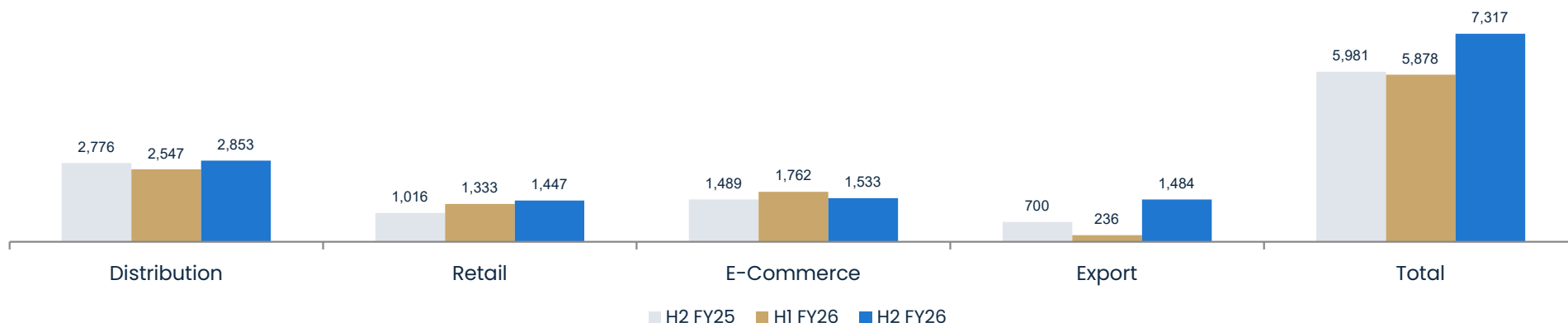
Looking ahead, we aim to scale our store network to 100+ stores by the close of FY27, with continued focus on omni-channel retail expansion, deeper brand partnerships, and disciplined execution. The medium-term ambition of building a 500-store omni-channel network across urban and Tier-II catchments remains firmly intact."



Revenue Segmentation *Half-Yearly Performance by Vertical*

Half-Yearly Revenue from Operations (₹ Mn)

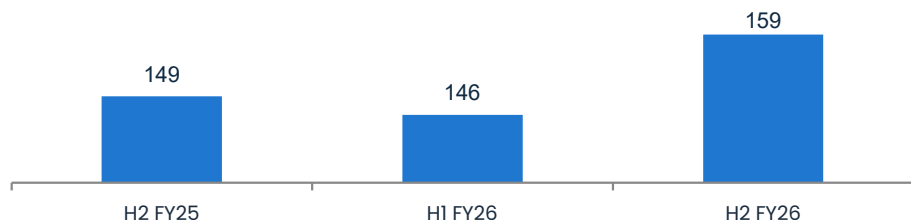
Growth %	Distribution	Retail	E-Commerce	Export	Total
YoY: +2.8% HoH: +12.0%	YoY: +42.4% HoH: +8.6%	YoY: +3.0% HoH: (13.0%)	YoY: +112.1% HoH: +529.0%	YoY: +22.3% HoH: +24.5%	



Total includes other operating income not allocated to segments. Revenue from Operations as per audited financials: ₹7,290 Mn (H2 FY26) | ₹13,157 Mn (FY26)

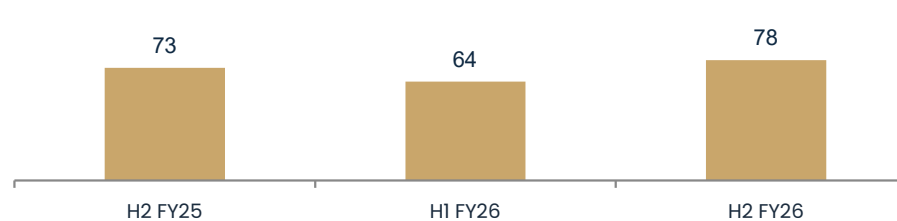
EBITDA Profile (₹ Mn) & Margin (%)

YoY: **+7.3%** | HoH: **+8.8%** | Margin: **2.5% → 2.5% → 2.2%**



PAT Profile (₹ Mn) & Margin (%)

YoY: **+6.6%** | HoH: **+20.7%** | Margin: **1.2% → 1.1% → 1.1%**





Income Statement FY26 & H2 FY26

Particulars (₹ Mn)	H2 FY26	H2 FY25	YoY %	H1 FY26	HoH %	FY26	FY25	YoY %
Revenue from operations	7,290.2	5,966.9	22.2%	5,867.0	24.3%	13,157.2	11,192.4	17.6%
Cost of goods sold	6,830.9	5,655.2	20.8%	5,548.6	23.1%	12,379.6	10,562.6	17.2%
Gross Profit	459.3	311.7	47.4%	318.4	44.3%	777.6	629.8	23.5%
Gross Margin %	6.3%	5.2%	+110 bps	5.4%	+90 bps	5.9%	5.6%	+28 bps
Employee benefit expenses	62.8	54.5		56.4		119.2	99.2	
Other expenses ¹	237.2	108.7		115.6		352.8	294.6	
Total operating expenses	300.0	163.2		172.0		472.0	393.8	
EBITDA	159.3	148.5	7.3%	146.4	8.8%	305.6	236.0	29.5%
EBITDA Margin %	2.2%	2.5%	(31 bps)	2.5%	(32 bps)	2.3%	2.1%	+21 bps
Depreciation & amortisation ³	5.2	2.6		3.1		8.3	4.3	
EBIT	154.1	145.9	5.6%	143.3	7.5%	297.3	231.7	28.3%
Finance cost	77.1	63.6		65.9		143.0	120.8	
Other income ²	28.7	15.3		9.7		38.4	31.2	
Profit before tax	105.7	97.6	8.3%	87.1	21.4%	192.7	142.1	35.6%
Total tax expense	28.1	24.8		22.8		50.9	36.9	
Profit after tax	77.6	72.8	6.6%	64.3	20.7%	141.8	105.2	34.8%
PAT Margin %	1.1%	1.2%	(16 bps)	1.1%	(4 bps)	1.1%	0.9%	+14 bps

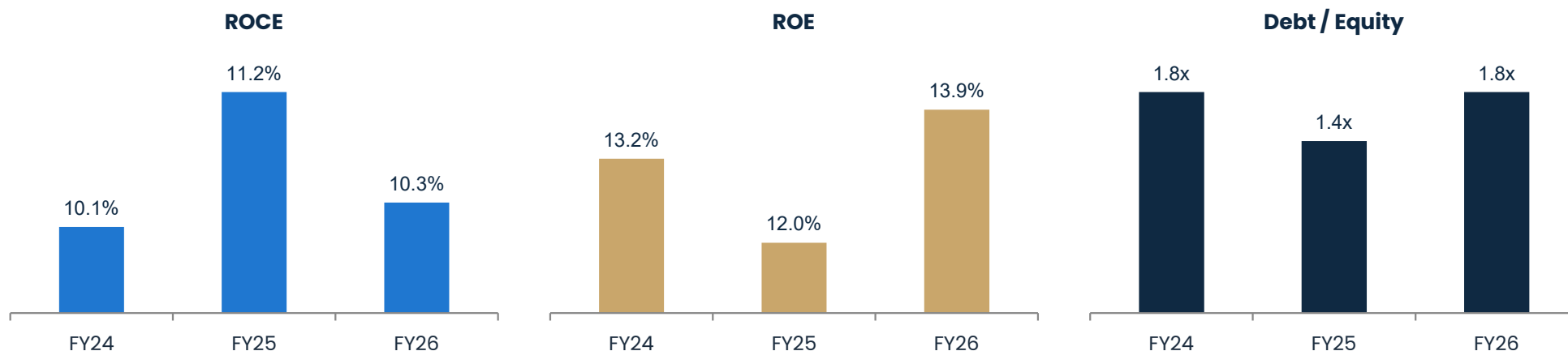
¹ **Other expenses (₹237.2 Mn in H2 FY26 vs ₹108.7 Mn in H2 FY25):** Increase primarily reflects (a) full-period rent, manpower, electricity and marketing expenses from 24 new COCO stores added during FY26; (b) pre-opex absorption for stores under 12 months of operation, (c) higher freight and platform fees on e-commerce volumes.

² **Other income (₹28.7 Mn in H2 FY26 vs ₹15.3 Mn in H2 FY25):** Includes interest income from fixed deposits & Forex gain from Exports.

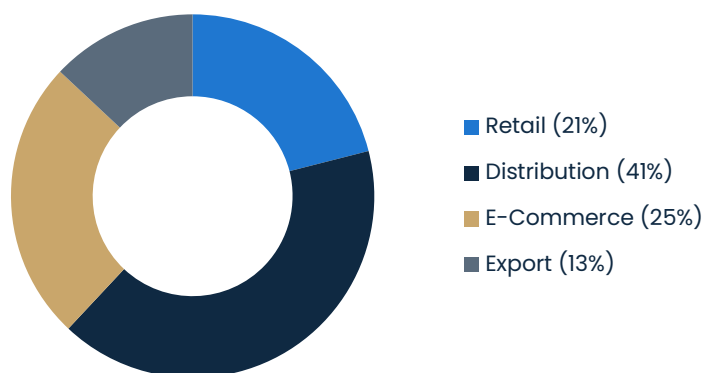
³ **D&A (₹5.2 Mn in H2 FY26 vs ₹2.6 Mn in H2 FY25):** Step-up reflects amortisation of fit-out capex.



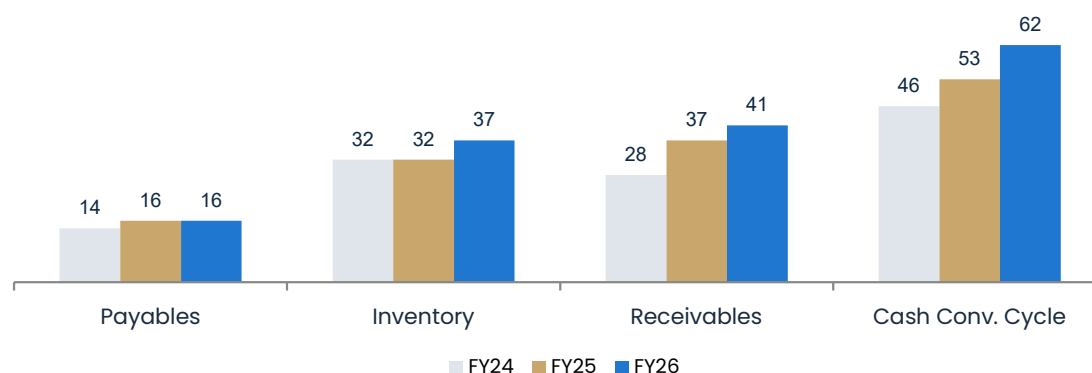
Key Financial Ratios FY24 – FY26



Sector-Wise Revenue Contribution (FY26)



Working Capital Days

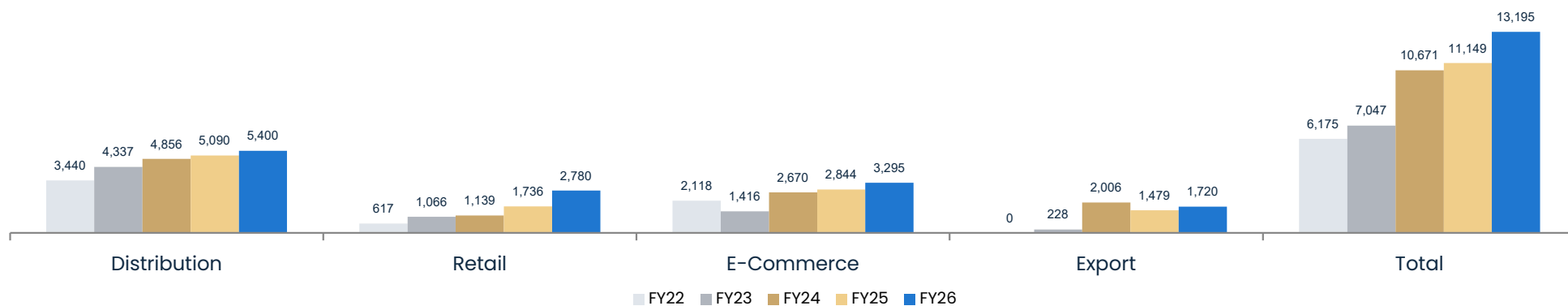




5-Year Track Record *PAT Compounding 2.5x Revenue*

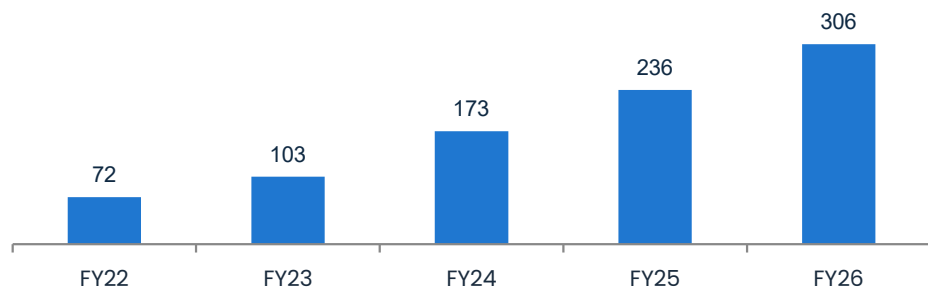
Revenue Growth Trends – by Vertical (₹ Mn)

4-Yr CAGR	Distribution 11.9%	Retail 45.7%	E-Commerce 11.7%	Export (3yr) 96.1%	Total CAGR 20.9%
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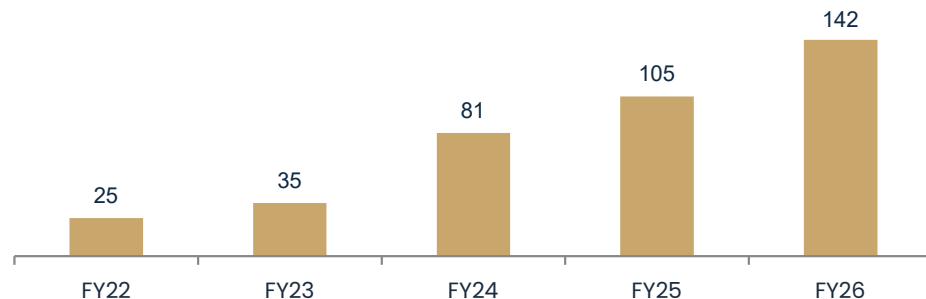
EBITDA Profile (₹ Mn) | CAGR 43.6%

Margin %: 1.2% → 1.5% → 1.6% → 2.1% → 2.3%



PAT Profile (₹ Mn) | CAGR 54.2%

Margin %: 0.4% → 0.5% → 0.8% → 0.9% → 1.1%





Financial Performance Over the Years *5-Year Income Statement & Balance Sheet*

Income Statement (₹ Mn)

Particulars	FY22	FY23	FY24	FY25	FY26
Revenue	6,174.6	7,046.8	10,642.4	11,192.4	13,157.2
COGS	5,865.0	6,703.8	10,212.4	10,562.6	12,379.6
Gross Profit	309.6	343.0	430.0	629.8	777.6
<i>Gross Margin %</i>	<i>5.0%</i>	<i>4.9%</i>	<i>4.0%</i>	<i>5.6%</i>	<i>5.9%</i>
Emp benefit exp	62.9	61.8	75.2	99.2	119.2
Other expenses	174.9	178.1	181.8	294.6	352.8
Total opex	237.8	239.9	257.0	393.8	472.0
EBITDA	71.8	103.1	173.0	236.0	305.6
<i>EBITDA Margin %</i>	<i>1.2%</i>	<i>1.5%</i>	<i>1.6%</i>	<i>2.1%</i>	<i>2.3%</i>
D&A	2.4	1.9	1.4	4.3	8.3
EBIT	69.4	101.2	171.6	231.7	297.3
Finance cost	44.4	60.0	90.7	120.8	143.0
Other income	8.9	8.0	28.8	31.2	38.4
PBT	33.9	49.2	109.7	142.1	192.7
Tax	8.8	14.1	28.6	36.9	50.9
PAT	25.1	35.1	81.1	105.2	141.8
<i>PAT Margin %</i>	<i>0.4%</i>	<i>0.5%</i>	<i>0.8%</i>	<i>0.9%</i>	<i>1.1%</i>

Balance Sheet (₹ Mn)

Particulars	FY22	FY23	FY24	FY25	FY26
Equity share capital	21.9	28.5	171.0	178.0	178.0
Reserves & surplus	325.4	503.3	441.8	701.0	842.8
Total Equity	347.3	531.8	612.8	879.0	1,020.8
LT borrowings	58.4	38.0	17.3	7.0	0.1
Other LT liabilities	4.5	6.3	7.4	9.0	9.9
ST borrowings	538.3	601.1	1,062.0	1,176.7	1,867.8
Trade payables	264.0	304.6	419.0	501.0	589.9
Other CL	53.8	59.3	64.0	77.8	90.1
TOTAL EQUITY & LIAB	1,266.3	1,541.1	2,182.5	2,650.5	3,578.6
Fixed & tangible assets	5.6	4.8	9.0	18.6	24.9
Non-current investments	20.8	20.8	127.7	127.7	129.6
Other non-current assets	92.5	119.0	116.5	49.9	47.6
Inventories	560.3	554.8	928.1	993.2	1,346.8
Trade receivables	449.7	683.1	807.9	1,138.0	1,471.9
Cash & bank	8.6	4.7	6.7	188.1	359.0
Other current assets	129.0	154.0	186.6	134.8	199.0
TOTAL ASSETS	1,266.5	1,541.2	2,182.5	2,650.3	3,578.8



About the Company

Business Verticals

Distribution

₹5,400 Mn

+2.8% YoY

Retail

₹2,780 Mn

+60.1% YoY

E-Commerce

₹3,295 Mn

+15.9% YoY

Export

₹1,720 Mn

+16.3% YoY

All figures FY26 full-year, vs FY25.

About us

Profile: Logica Infoway Limited (BSE: 543746) is an established pan-India consumer-electronics distributor and omni-channel retailer, in operations since 1995. Under the leadership of CMD Mr. Gaurav Goel (three decades of industry experience), the Company partners with leading global brands including Samsung, Apple, Dell, HP, Lenovo, ASUS, Oppo, Vivo, Realme, Xiaomi, Motorola, Tecno, Infinix and boAt across smartphones, IT hardware and accessories. FY26 marked the highest-ever revenue, EBITDA and PAT in the Company's three-decade history.

Services: Four-vertical business model: Distribution (Tier-I authorised mandates), Company-Owned Retail (COCO stores), E-Commerce (marketplace and direct), and Export. Operating on SAP Business One ERP (migrated April 2025) for centralised inventory and procurement visibility.

Geographic reach: Pan-India presence across Kolkata, Delhi-NCR, Bengaluru, Hyderabad, Lucknow, Mumbai, Gurugram and Noida. 77 COCO retail stores spanning 38,000+ sq. ft. across urban and Tier-II catchments at FY26-end — up from 53 stores at FY25-end.

Financial Highlights — FY26

Total Revenue

₹13,157 Mn

+17.6% YoY

EBITDA

₹306 Mn

+29.5% YoY

PAT

₹142 Mn

+34.8% YoY

ROE

13.9%

FY26

ROCE

10.3%

FY26



Journey *Three Decades of Disciplined Execution*

1995–2009

Foundation

- Launched business in 1995 with focus on servicing, maintenance and LAN/WAN installations
- Forged early distribution partnerships with HP, Samsung, Lenovo, Sony Vaio and HCL between 1998 and 2009
- Entered retail with first store in Kolkata in 2002
- Crossed ₹50 Cr revenue milestone in FY07

2010–2015

Retail Expansion

- Scaled retail to 6 Kolkata stores by 2011 and diversified into mobile distribution
- Launched e-commerce operations in 2013 across Snapdeal, Amazon and Flipkart
- Crossed ₹200 Cr revenue milestone in FY13

2016–2020

Geographic Scale-Up

- Expanded geographic footprint with new offices in Durgapur, Midnapur and Murshidabad (2016)
- Opened first retail store outside West Bengal – Delhi (2017)
- Commenced operations in Delhi, Telangana and Karnataka in 2017; expanded into Bhiwandi, Maharashtra in 2018
- Crossed ₹400 Cr revenue milestone in FY18

2021–2026

Listed & Scaling

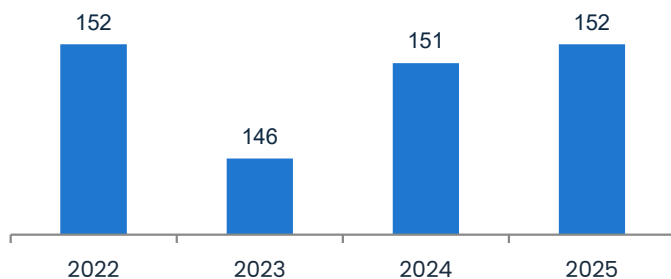
- Opened new distribution office in Gurgaon, Haryana (2021)
- Successfully listed on BSE SME platform via IPO in January 2023
- Expanded into Uttar Pradesh with Lucknow office (2023)
- Crossed ₹1,000 Cr revenue milestone in FY24
- Migrated enterprise systems from Tally ERP to SAP Business One in April 2025
- Secured Tier-I Samsung Notebooks distribution mandate (WB, Delhi-NCR, UP, Haryana)
- Added 24 net new COCO stores to take the network to 77 stores / 38,000+ sq.ft.
- Crossed ₹1,300 Cr revenue (₹13,157 Mn), with EBITDA at ₹306 Mn and PAT at ₹142 Mn – all all-time highs



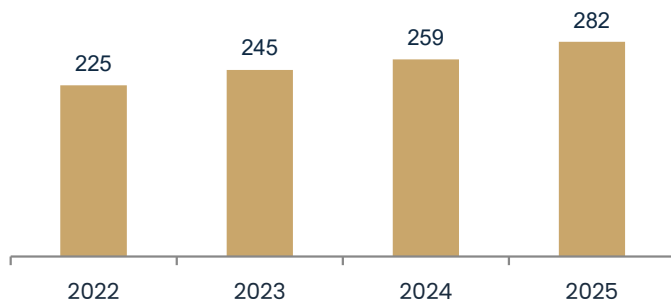
India Smartphone Market *Structural Tailwinds Favouring Organised Omni-Channel Retail*

CY25: 152 Mn smartphones | ASP US\$282 (+8% YoY) | Offline share 57% (vs 51% in 2024)

India smartphone shipments (Mn units)



India smartphone ASP (US\$)



Premiumisation, not affordability

Premium segment (>₹30,000) grew 29% YoY in Q3 CY25; Apple shipped a record 14 Mn iPhones in 2025 (+16% YoY). Demand is shifting up the price ladder – directly aligned with Logica’s authorised retail of Apple, Samsung, Dell, HP, Lenovo.

Offline channel resurgence

Offline grew 12% YoY in 2025 to a 6-year high; online declined 12%. Structurally expanding channel – 24 net new COCO stores in FY26 land into a tailwind.

Tier-II + financing-led penetration

5G already at 88% of shipments; replacement and financing are now the drivers, supported by brand-led offline expansion into smaller cities.

Entry-premium upgrade cycle

Entry-premium (₹17–35k) was the fastest-growing band at +35% YoY in 2024. Higher ticket sizes drive higher absolute gross profit per transaction – supports Logica’s GM expansion to 5.91% in FY26.

Brand-led omnichannel is the winning model

Brand omnichannel strategies – channel margins, in-store promoters, price drops – drove the offline rebound. Logica’s Tier-I mandates (Samsung Notebooks, exclusive Infinix in Gurgaon) + COCO retail directly fit this model.

Sources: IDC (2025–26), Counterpoint Research (2025), Omdia (Oct 2025).



CY25: India PC market shipped 15.9 Mn units (+10.2% YoY) – strongest year on record, first time crossing 15 Mn | Notebooks +9.5%, Workstations +14.2% in Q3 CY25

Windows refresh + enterprise upgrade cycle

Enterprise demand surged 21.2% YoY in Q2 CY25 and 26.4% in 1H CY25, driven by Windows refresh cycles. SMB segment grew 13–19% YoY. Logica's distribution mandates with HP, Dell, Lenovo and ASUS sit at the centre of this refresh.

AI PC adoption – fast-growing category

AI notebooks surged 145% YoY in 1H CY25; basic AI notebooks now 86% of AI shipments, with next-gen AI PCs crossing 100,000 units in a single quarter for the first time. Premiumisation tailwind for organised retail.

New Samsung Notebooks mandate

Logica-specific catalyst: Tier-I distribution mandate secured across West Bengal, Delhi-NCR, UP and Haryana – direct play on Samsung's growing position in the Indian PC market.

Government & education spend

ELCOT education project expected to boost the commercial segment in 2H CY25; government segment grew 10.6% YoY in 2024 via GeM and public procurement.

Premium notebooks growing despite price hikes

Premium notebooks (>US\$1,000) grew 8.5% YoY in Q3 CY25 even as PC prices rose over 10% YoY in 2025. Higher ticket → higher absolute gross profit per transaction.

India rising as a global PC market

India's share of global PC shipments rising structurally: 5.6% of global shipments in 2025 vs 3.3% in 2020 – multi-year secular tailwind for scale distributors.

Sources: IDC Worldwide Quarterly PCD Tracker (May 2025, Aug 2025, Nov 2025, Mar 2026).



Retail Business *Scalable COCO Platform Driving the Mix Shift*

Driving Growth Through a Scalable Retail Platform

Logica's Company-Owned-Company-Operated (COCO) retail network has emerged as the primary growth engine and margin driver of the business. As at FY26-end, we operate **77 stores across 4 states** (West Bengal, Delhi-NCR, Uttar Pradesh, Haryana), spread over **38,125 sq. ft.** through Multi-Brand Outlets, HP World stores, and Samsung Experience Stores.

Retail revenue scaled from ₹617 Mn in FY22 to ₹2,780 Mn in FY26 – a **4-year CAGR of 45.7%**, with H2 FY26 alone delivering ₹1,447 Mn (+42.4% YoY). Mature stores (>12 months) deliver ~2.6x the monthly throughput of younger stores, providing strong embedded operating leverage.

Exclusive partnerships with Samsung, HP, Vivo and Realme, backed by direct billing arrangements, deliver superior margin capture. SAP Business One (live since April 2025) enables real-time store-level visibility on revenue, margins and inventory.

77

COCO Stores

4

States

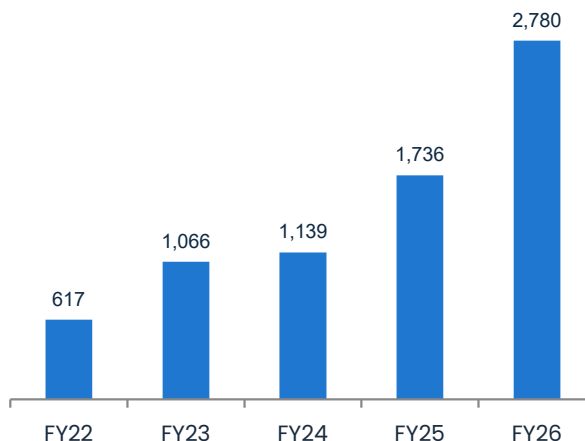
38,125 Sq.Ft.

Retail Space

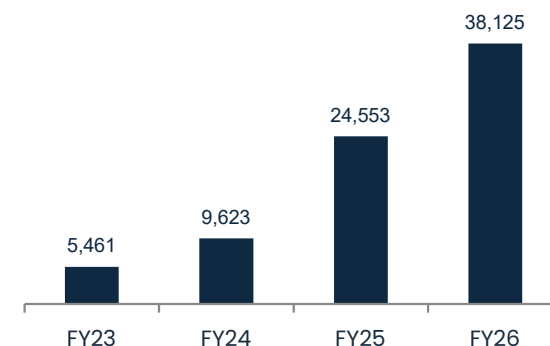
₹2,780 Mn

FY26 Revenue

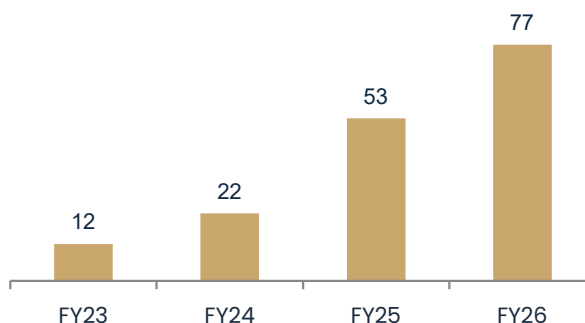
Retail Revenue (₹ Mn) | CAGR 45.7%



Total Retail Space (sq. ft.)



No. of Stores



Key Highlights

- ▶ Retail revenue CAGR of 45.7% (FY22–FY26) – fastest-growing segment
- ▶ Store count expanded 6.4x in 3 years (12 → 77) since FY23
- ▶ Retail space expanded 7.0x since FY23 (5,461 → 38,125 sq. ft.)
- ▶ SAP Business One delivers real-time P&L and inventory visibility
- ▶ Exclusive brand partnerships: Samsung, HP, Vivo, Realme



COCO Stores *Embedded Operating Leverage from a Young Store Base*

Rapid Network Build

Standardised store design + centralised SAP-enabled backend → new store rolls out in ~60 days from site finalisation. Enables disciplined expansion into high-potential micro-markets.

Profitable Format

Direct-to-brand billing arrangements with Samsung, HP, Vivo, Realme deliver superior margin capture vs pure distribution. Strong cross-sell on accessories and financing programs.

Compact, Capital-Light Footprint

Median store size of ~500 sq. ft. (range 200–1,200 sq. ft.), keeping rental and fit-out costs efficient.

Centralised Inventory Discipline

SAP Business One (live April 2025) delivers real-time store-level visibility on stock, ageing and margins. Drives faster turns, lower markdowns and better product availability.

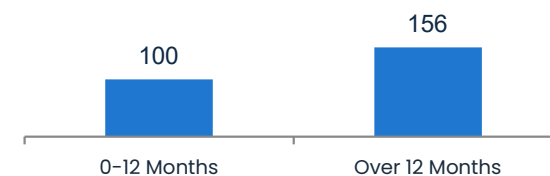
Young Store Base — Strong Upside Ahead

24 of 77

stores added in FY26 — significant embedded earnings runway as the new cohort matures

Mature stores (>24 months) deliver ~2.2x the monthly revenue of stores under 12 months, with legacy stores (pre-2020) running at ~4x. As the FY26 cohort matures into FY27, every store moving up one tier contributes meaningfully to the consolidated EBITDA line.

Avg Monthly Sales by Store Age (rebased)





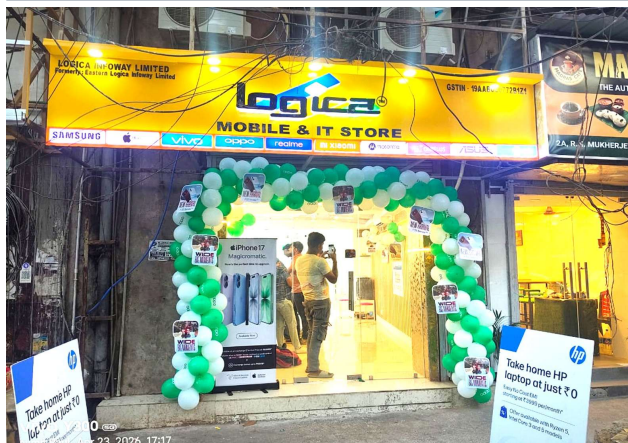
Retail Space *Glimpses Across Formats & Geographies*

SAMSUNG EXPERIENCE STORE



Samsung Experience Store
Naihati, West Bengal

BRAND-EXCLUSIVE FORMAT



ASUS Premium Retailer + OPPO
Serampore, West Bengal

MULTI-BRAND OUTLETS (MBO)



Chinar Park
Kolkata, WB



R.N. Mukherjee Rd
Kolkata, WB



MBO Format
Vivo-led display

77

COCO Stores

4

States

38,125

Sq. Ft. Retail Space

₹2,780 Mn

FY26 Retail Revenue

45.7%

Revenue CAGR (FY22–FY26)

Formats: Multi-Brand Outlets (MBO) • Samsung Experience Stores • HP World • Brand-Exclusive (OPPO / ASUS / Vivo)



Other Verticals *Distribution, E-Commerce & Export*

DISTRIBUTION

Engine Powering Scalable Growth

₹5,400 Mn

FY26 Revenue
+6.1% YoY Growth

41%

Consolidated Revenue
Largest Contributor

11

States Coverage
3,000+ Retail Partners

HP · Samsung · Dell · ASUS · Lenovo · Infinix · Brother

- 13 warehouses across pan-India distribution network
- Tier-I distributor: Samsung Notebooks (WB, Delhi-NCR, UP, Haryana) – NEW IN FY26
- Exclusive rights: Infinix in Gurgaon; Brother printers (WB)
- Deep North & East India regional footprint
- FY27 target: Tier-II / Tier-III market expansion

E-COMMERCE

Scaling Digital Commerce

₹3,295 Mn

FY26 Revenue
+15.9% YoY Growth

25%

Consolidated Revenue
Steady Growth

13

Warehouses
Pan-India Fulfilment

Amazon · Flipkart · OnePlus · Realme · HP · ASUS · Lenovo

- Digital-first execution with disciplined working-capital
- Curated brand portfolio: smartphones, laptops, peripherals
- High serviceability with competitive pricing at scale
- Exclusive brand programmes & data-driven sale events
- Selective expansion into D2C & regional marketplaces

EXPORT

Re-engaged with Sharper Discipline

₹1,720 Mn

FY26 Revenue
+16.3% YoY Growth

13%

Consolidated Revenue
Selective Scale Up

ROCE

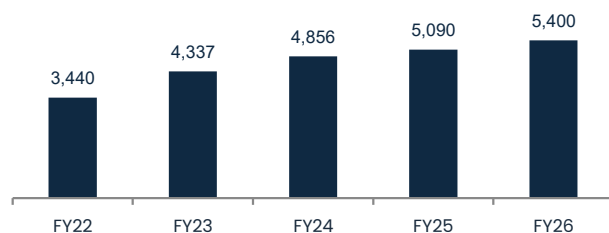
Higher Focus
Value over Volume

Smartphones & Laptops · Middle East · Selective Volume

- Longer working-capital cycles than domestic channels
- Delivered lower ROCE vs retail & e-commerce franchises
- Capital reallocated to domestic retail & digital channels
- Tighter control: pricing, inventory turns, CX
- Active but selective – sharper capital discipline ahead

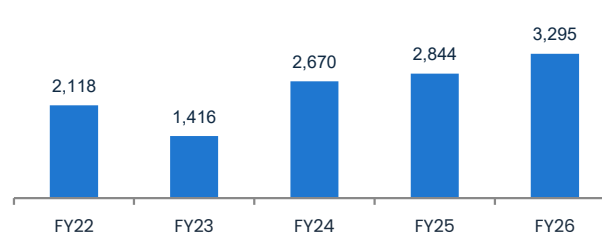
Distribution Revenue (₹ Mn)

CAGR 11.9%



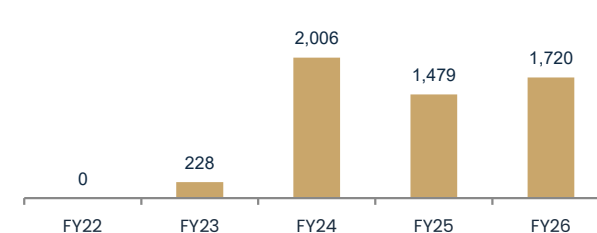
E-commerce Revenue (₹ Mn)

CAGR 11.7%



Export Revenue (₹ Mn)

CAGR 96.1% (3yr)





Future Outlook *FY27 & Medium-Term*

FY27 Growth Guidance

Building on the FY26 performance – which delivered revenue growth of 17.6%, ahead of the 12–16% expectation at the start of the year – the Company expects to sustain double-digit consolidated revenue growth in FY27, supported by continued retail network expansion, scale-up of existing brand mandates, and selective deepening in digital-commerce and export opportunities.

Retail as Core Growth Engine

- Store network: 77 → 100+ stores by close of FY27 (24 net adds in FY26 to be followed by similar pace)
- Retail space: 38,125 sq. ft. → 50,000+ sq. ft.
- Continued mix shift toward retail to drive further margin expansion

Other Verticals – Calibrated, Profitability-Led

- Distribution: High single-digit YoY growth – backbone of the business, scaling Tier-I mandates (Samsung Notebooks, Infinix)
- E-Commerce: High single-digit YoY growth – disciplined capital allocation, curated brand portfolio
- Export: Selective, profitability-led – continuing the H2 FY26 re-engagement on a higher-margin, lower-risk basis (no specific % guidance)

Profitability & Capital Discipline

- EBITDA margin: 2.32% (FY26) → 2.0–3.0% range (FY27 target) – driven by maturing of FY26 store cohort, continued retail mix expansion, and SAP-enabled inventory turn / procurement gains
- Funding: Retail rollout and working capital via internal accruals + calibrated working-capital borrowing – preserving balance-sheet resilience

Medium-Term Vision (Next 4 Years)

- 500-store omni-channel retail network across urban and Tier-II catchments
- Calibrated growth in Distribution, E-Commerce and Export
- Positioning Logica as the preferred consumer-tech retail partner for leading global brands in India – across smartphones, IT hardware and accessories
- Continuing the transition from distribution-led to retail-led, omni-channel franchise



Products Portfolio 30+ Global Brands Across Smartphones, IT & Accessories

SMARTPHONES



- Apple iPhones
- Samsung Galaxy
- Samsung Galaxy S25 Ultra 5G
- vivo T2x 5G
- OPPO A78 5G
- OnePlus Nord CE4
- realme 12 Pro+ 5G

LAPTOPS



- ASUS Vivobook AMD R5 5600H
- HP Laptop 15s-fr2515TU
- Predator Helios Neo 16
- Samsung Galaxy Book 4
- Acer Predator Helios Neo 16
- ASUS TUF Gaming G15
- Lenovo IdeaPad Slim 3

SOFTWARE & SERVICES



DESKTOPS & WIRELESS



PRINTERS & STORAGE



ACCESSORIES



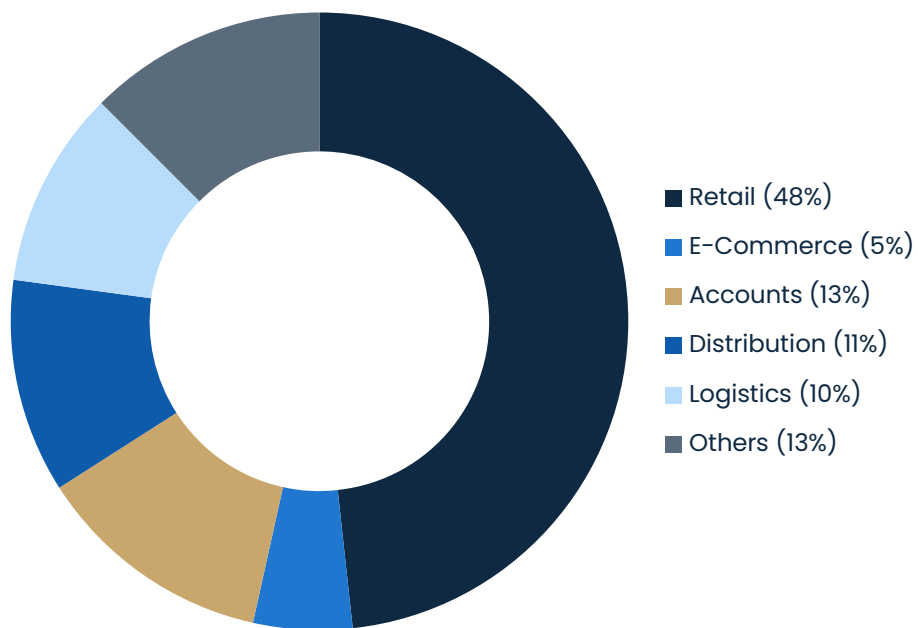


Our Partner Brands *30+ Global Brand Partnerships*





Employee Distribution by Function



TOTAL HEADCOUNT

232+

employees as at 31 March 2026

IMPLIED HEADCOUNT BY FUNCTION

Retail	~112
E-Commerce	~12
Accounts	~29
Distribution	~26
Logistics	~24
Others	~29

Retail accounts for 48% of headcount – reflecting the deliberate investment in the higher-margin retail vertical.



Leadership Team *Three Decades of Industry Expertise*

EXECUTIVE & NON-EXECUTIVE DIRECTORS



GAURAV GOEL

Founder, Chairman cum
Managing Director



SHWETA GOEL

Whole-Time Director



RAKESH KUMAR GOEL

Non-Executive Director

INDEPENDENT DIRECTORS



Dinesh Arya

Independent Director



**Nil Kamal
Samanta**

Independent Director



Vinita Saraf

Independent Director

KEY MANAGERIAL PERSONNEL



KSHITIJ GOEL

Chief Information Officer



SUNDEEP MISHRA

Chief Operating Officer



DEEPAK KUMAR JHA

Chief Financial Officer



PRIYANKA GERA

Company Secretary

Shareholding Mix



■ Promoter (71.0%) ■ Public (29.0%)

KEY OBSERVATIONS

Promoter holding 71.0% — diluted from 73.6% (Mar 2025) via preferential issue

No promoter pledge (0.00%)

Locked-in shares 0.34% (Mar-26) vs 41.59% (Sep-25) — lock-in expired

Public float 29.0% — currently no FII / DII / MF holding

Source: BSE filing | Total paid-up equity: 17,797,614 shares (₹178 Mn at ₹10 face value)

PROMOTER HOLDING — 71.0%		
Shareholder	Type	% Holding
Himadri Dealcom Pvt Ltd	Corporate	33.00%
Gaurav Goel (CMD)	Individual	17.61%
Shweta Goel	Individual	11.90%
Logica Systems & Peripherals	Corporate	5.06%
Sonartari Tradelink Pvt Ltd	Corporate	3.14%
Others (3 individuals × 0.08%)	Individual	0.24%
Total Promoter		70.96%

PUBLIC HOLDING — 29.0%	
Category	% Holding
Resident Individuals (>₹2L)	11.18%
Deepak Kumar Agarwal	2.07%
Bodies Corporate	9.71%
Top 4 corporates*	6.07%
Individuals (≤₹2L)	5.10%
HUF	2.91%
NRIs	0.14%
Total Public	29.04%

Promoter mix: Corporates 41.19% | Individuals & HUF 29.77%

PROMOTER HOLDING TREND

Period	Mar 2024	Mar 2025	Sep 2025	Mar 2026
Promoter	73.59%	73.59%	70.96%	70.96%
Public	26.41%	26.41%	29.03%	29.04%
FII / DII / MF / Pledge	0%	0%	0%	0%

Promoter dilution from 73.6% → 71.0% (Sep 2025) reflects preferential issue; no further change in H2 FY26. Locked-in shares dropped from 41.59% (Sep 2025) to 0.34% (Mar 2026) on expiry of statutory lock-in.



Thank You

Three Decades. Four Verticals. One Vision.

INVESTOR RELATIONS

investor.relations@logicainfoway.com

BSE: 543746 | ISIN: INE0BSU01018

Logica Infoway Limited | H2 FY26 & FY26 Earnings Presentation | May 2026