Date: November 20, 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

Dear Sir/Madam,

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

With reference to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find enclosed the Investor Presentation on Unaudited Financial Results for the half year ended September 30, 2026.

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

Request you to kindly take the above information on records and to treat the same as compliance with the applicable provisions of the SEBI (LODR) Regulations, 2015.

Thanking you,
Yours faithfully,

For **LOGICA INFOWAY LIMITED**

Priyanka Gera
Digitally signed by Priyanka Gera
Date: 2026.11.20 12:55:28 +05'30'

Priyanka Gera (Membership No. A63809)
Company Secretary & Compliance Officer

Encl.: as above

Investor Presentation **NOV 2026**

LOGICA INFOWAY LIMITED

Earnings Presentation

H1 FY27

HALF YEAR ENDED 30 SEPTEMBER 2026

Closer to markets. Faster in execution. Ready to scale.

BSE: 543746 | ISIN: INE0BSU01018



FORWARD-LOOKING STATEMENT

DISCLAIMER

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.

Highest half-yearly revenue, EBITDA and PAT on record.

H1 FY27 YOY

31.0 %
Revenue growth

24.0 %
EBITDA growth

57.1 %
PAT growth

+29.9 bps
Gross margin expansion

H1 FY27 EARNINGS HIGHLIGHTS

REVENUE FROM OPERATIONS

₹7,683.6 Mn, up **31.0%** YoY (H1 FY26: ₹5,867.0 Mn), the highest half-year on record. Export ₹1,921.4 Mn (**+717.6%** YoY) led; Retail **+35.0%** YoY.

GROSS MARGIN

5.7%, up 29.9 bps YoY (H1 FY26: 5.4%), **57.4 bps** below the record **6.3%** of H2 FY26. Retail now **23.4%** of revenue (H1 FY26: **22.7%**).

EBITDA & EBITDA MARGIN

₹181.6 Mn, up **24.0%** YoY (H1 FY26: ₹146.4 Mn). Margin 2.4%, (13.2bps) YoY and **+17.9 bps** HoH; within the **2.0–3.0%** FY27 range.

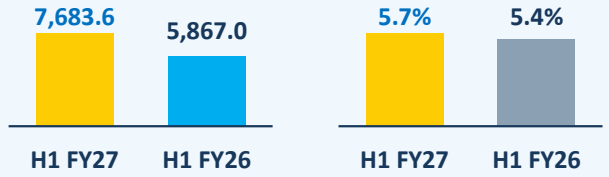
PAT & PAT MARGIN

₹100.9 Mn, up **57.1%** YoY (H1 FY26: ₹64.2 Mn). Margin 1.3%, +21.8 bps YoY; finance cost **₹84.1 Mn** (H1 FY26: **₹65.9 Mn**).

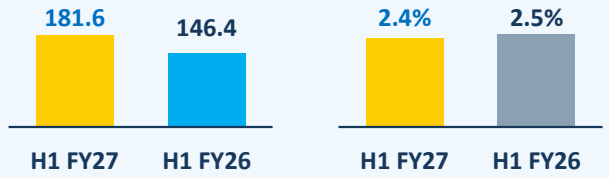
EARNINGS PER SHARE

₹5.67, up **57.1%** YoY (H1 FY26: ₹3.61).

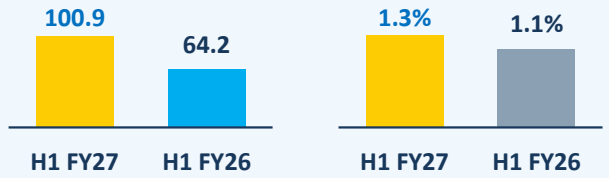
REVENUE · GM +31.0% | +29.9 bps



EBITDA · MARGIN +24.0% | (13.2) bps



PAT · MARGIN +57.1% | +21.8 bps



H1 FY27 topped H2 FY26

VS H2 FY26 (HOH)

+5.4 %
Revenue, HoH

+14.0 %
EBITDA, HoH

+17.9 bps
EBITDA margin, HoH

+30.1 %
PAT, HoH

HALF-YEARLY TREND

H1 FY27 VS H1 FY26 (YOY) AND H2 FY26 (HOH)

REVENUE FROM OPERATIONS

₹7,683.6 Mn, up 31.0% YoY (H1 FY26: ₹5,867.0 Mn) and up **5.4%** HoH (H2 FY26: **₹7,290.2 Mn**). **Export rose to ₹1,921.4 Mn (H2 FY26: ₹1,485 Mn).**

GROSS MARGIN

5.7%, down 57.4 bps HoH from the record 6.3% in H2 FY26 and up **29.9 bps** YoY from **5.4%** in H1 FY26.

EBITDA & EBITDA MARGIN

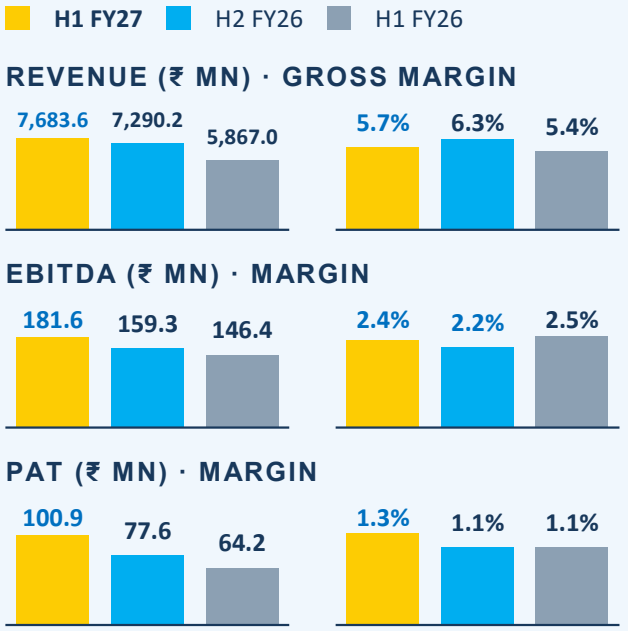
₹181.6 Mn, up 24.0% YoY and 14.0% HoH. Margin 2.4%: (13.2 bps) YoY (H1 FY26: 2.5%), +17.9 bps HoH (H2 FY26: **2.2%**).

PAT & PAT MARGIN

₹100.9 Mn, up 57.1% YoY and 30.1% HoH. Margin 1.3% (H2 FY26: 1.1%; H1 FY26: **1.1%**). Finance cost **₹84.1 Mn** (H2 FY26: **₹77.1 Mn**).

EARNINGS PER SHARE

₹5.67, up 57.1% YoY (H1 FY26: ₹3.61), up 30.1% HoH (H2 FY26: ₹4.36).



On H1 FY27 and the road ahead

H1 FY27 IN NUMBERS

+31.0 %

Revenue growth YoY

77

COCO stores

₹5.67

EPS (H1 FY26: ₹3.61)

MANAGEMENT COMMENTARY

Commenting on the performance for H1 FY27, Mr Gaurav Goel, CMD, Logica Infoway Ltd, said:

"H1 FY27 was **our best half-year on record**: revenue of ₹7,683.6 Mn (**+31.0%** YoY), EBITDA of ₹181.6 Mn (**+24.0%** YoY) and PAT of ₹100.9 Mn (+57.1% YoY), running ahead of the double-digit growth we guided for FY27. Gross margin rose 29.9 bps YoY to **5.7%**, and export revenue reached **₹1,921.4 Mn**.

Retail remained the engine, growing 35% YoY to ₹1,800 Mn, or 23.4% of revenue against 22.7% a year ago. Export business has been an opportunistic play with 35% HoH growth. We operate 77 COCO stores across ~38,125 sq. ft retail area. The market was tough: memory-chip costs pushed device prices up and smartphone volumes down."

"Looking ahead, we remain on course to take the network past 100 stores and 50,000+ sq. ft. by the close of FY27. Our medium-term ambition of a 500-store omni-channel network across urban and Tier-II catchments is unchanged."



GAURAV GOEL

Chairman cum Managing Director

Export was the fastest-growing vertical, now 25.0% of revenue.

REVENUE MIX

H1 FY27

H1 FY26

Distribution	**33.6%** vs **43.4%**
E-Commerce	**18.6%** vs **30.0%**
Retail	**23.4%** vs **22.7%**
Export	**25.0%** vs **4.0%**

REVENUE SEGMENTATION

HALF-YEARLY REVENUE BY VERTICAL (₹ MN)

H1 FY27 H2 FY26 H1 FY26

DISTRIBUTION	RETAIL	E-COMMERCE	EXPORT	TOTAL
YoY **+1.2%**	YoY **+35.0%**	YoY **(19.1%)**	YoY **+717.6%**	YoY **+31.0%**
HoH **(9.6%)**	HoH **+24.3%**	HoH **(7.0%)**	HoH **+29.4%**	HoH **+5.4%**
2,578	1,800	1,426	1,921.4	7,683.6
2,853	1,447	1,533	1,485	7,290.2
2,547	1,333	1,762	235	5,867.0

EBITDA PROFILE (₹ MN)

YoY +24.0% | HoH +14.0% | Margin 2.4% | 2.2% | 2.5%

181.6 | 159.3 | 146.4

PAT PROFILE (₹ MN)

YoY +57.1% | HoH +30.1% | Margin 1.3% | 1.1% | 1.1%

100.9 | 77.6 | 64.2

TOTAL = revenue from operations.

INCOME STATEMENT

Particulars (₹ Mn)	H1 FY27	H1 FY26	YoY %	H2 FY26	HoH %	FY26
Revenue from operations	**7,683.6**	**5,867.0**	**31.0%**	**7,290.2**	**5.4%**	**13,157.2**
Cost of goods sold	7,243.6	5,548.6	30.5%	6,830.9	6.0%	12,379.6
Gross Profit	**440.0**	**318.4**	**38.2%**	**459.3**	**(4.2%)**	**777.7**
Gross Margin %	*5.7%*	*5.4%*	*+29.9 bps*	*6.3%*	*(57.4 bps)*	*5.9%*
Employee benefit expenses	68.6	56.4		62.8		119.2
Other expenses[1]	189.8	115.6		237.2		352.8
Total operating expenses	**258.4**	**172.0**		**300.0**		**472.0**
EBITDA	**181.6**	**146.4**	**24.0%**	**159.3**	**14.0%**	**305.7**
EBITDA Margin %	*2.4%*	*2.5%*	*(13.2 bps)*	*2.2%*	*+17.9 bps*	*2.3%*
Depreciation & amortisation[3]	3.6	3.1		5.2		8.3
EBIT	**177.9**	**143.3**	**24.2%**	**154.1**	**15.5%**	**297.4**
Finance cost	84.1	65.9		77.1		143.0
Other income[2]	41.3	9.6		28.7		38.4
Profit before tax	**135.1**	**87.0**	**55.2%**	**105.7**	**27.8%**	**192.7**
Total tax expense	34.1	22.8		28.1		50.9
Profit after tax	**100.9**	**64.2**	**57.1%**	**77.6**	**30.1%**	**141.8**
PAT Margin %	*1.3%*	*1.1%*	*+21.8 bps*	*1.1%*	*+24.9 bps*	*1.1%*

[1] Other expenses ₹189.8 Mn (H1 FY26: ₹115.6 Mn; H2 FY26: ₹237.2 Mn). [2] Other income ₹41.3 Mn (H1 FY26: ₹9.6 Mn): forex gain ₹23.6 Mn, FD interest ₹10.2 Mn, capital gain ₹5.0 Mn. [3] D&A ₹3.6 Mn (H1 FY26: ₹3.1 Mn).

Returns and capital structure, rolled to 30 Sep 2026 on a trailing-twelve-month basis.

KEY FINANCIAL RATIOS

FY25 · FY26 · Sep26 (TTM)

H1 FY27 (TTM)

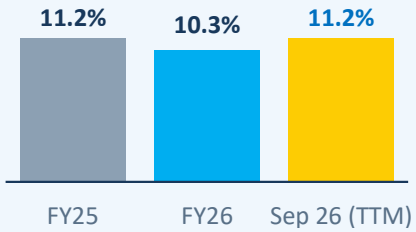
11.2 %
ROCE (FY26: 10.3%)

15.9 %
ROE (FY26: 13.9%)

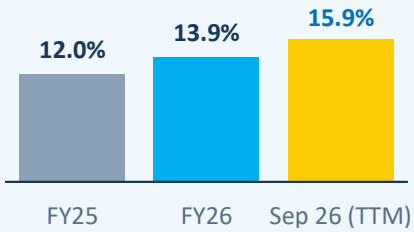
1.64 x
Debt / Equity (FY26: 1.83x)

54.1 days
Cash conversion cycle (FY26: 61.8)

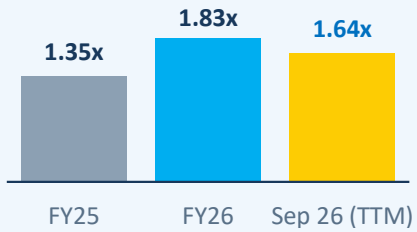
ROCE (%)



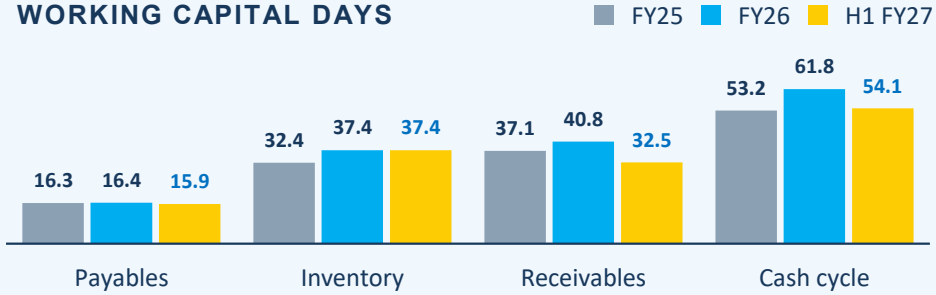
ROE (%)



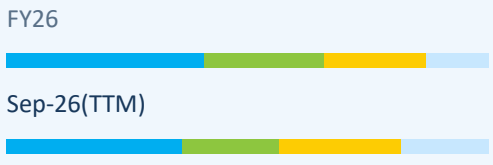
DEBT / EQUITY (X)



WORKING CAPITAL DAYS



REVENUE MIX



Dist. **41.0%→33.6%** · E-Com **25.0%→18.6%**
Retail **21.1%→23.4%** · Exp. **13.1%→25.0%**

PAT compounding 2.6x revenue.

4-YEAR CAGR

FY22–FY26

11.9%
Distribution

45.7%
Retail

11.7%
E-Commerce

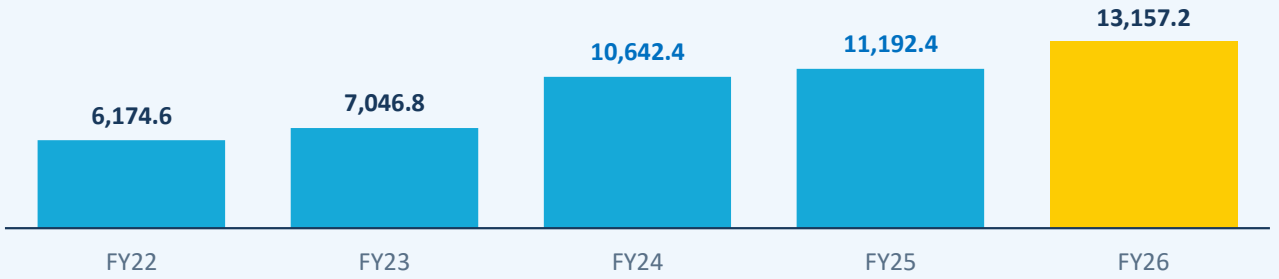
96.1%
Export (3-yr, FY23–FY26)

20.8%
Revenue from operations

5-YEAR TRACK RECORD

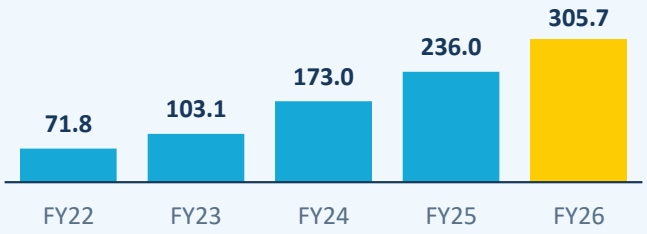
ANNUAL HISTORY

REVENUE FROM OPERATIONS (₹ MN) · CAGR 20.8%



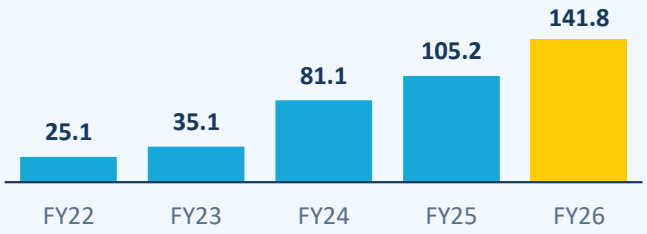
EBITDA (₹ MN) · CAGR 43.6%

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



PAT (₹ MN) · CAGR 54.2%

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



PERFORMANCE OVER THE YEARS

FY23–FY26 AND H1 FY27 (₹ MN)

Income Statement	FY23	FY24	FY25	FY26	H1 FY27*
Revenue	**7,046.8**	**10,642.4**	**11,192.4**	**13,157.2**	**7,683.6**
COGS	6,703.8	10,212.4	10,562.6	12,379.6	7,243.6
Gross Profit	**343.0**	**430.0**	**629.8**	**777.7**	**440.0**
Gross Margin %	*4.9%*	*4.0%*	*5.6%*	*5.9%*	*5.7%*
Employee cost	61.8	75.2	99.2	119.2	68.6
Other expenses	178.1	181.8	294.6	352.8	189.8
Total opex	**239.9**	**257.0**	**393.8**	**472.0**	**258.4**
EBITDA	**103.1**	**173.0**	**236.0**	**305.7**	**181.6**
EBITDA Margin %	*1.5%*	*1.6%*	*2.1%*	*2.3%*	*2.4%*
D&A	1.9	1.4	4.3	8.3	3.6
EBIT	**101.2**	**171.6**	**231.7**	**297.4**	**177.9**
Finance cost	60.0	90.7	120.8	143.0	84.1
Other income	8.0	28.8	31.2	38.4	41.3
PBT	**49.2**	**109.7**	**142.1**	**192.7**	**135.1**
Tax	14.1	28.6	36.9	50.9	34.1
PAT	**35.1**	**81.1**	**105.2**	**141.8**	**100.9**
PAT Margin %	*0.5%*	*0.8%*	*0.9%*	*1.1%*	*1.3%*

Balance Sheet	Mar-23	Mar-24	Mar-25	Mar-26	Sep-26
Share capital	28.5	171.0	178.0	178.0	178.0
Reserves & surplus	503.3	441.8	701.0	842.8	943.8
Total Equity	**531.8**	**612.8**	**879.0**	**1,020.8**	**1,121.7**
LT borrowings	38.0	17.3	7.0	0.1	302.8
Other LT liab.	6.3	7.4	9.0	9.9	10.6
ST borrowings	601.1	1,062.0	1,176.7	1,867.8	1,540.7
Trade payables	304.6	419.0	501.0	589.9	651.9
Other CL	59.3	64.0	77.8	90.1	85.4
Total Equity & Liab	**1,541.1**	**2,182.5**	**2,650.5**	**3,578.6**	**3,713.1**
Fixed assets	4.8	9.0	18.6	24.9	22.6
NC investments	20.8	127.7	127.7	129.6	107.5
Other NC assets	119.0	116.5	49.9	47.6	45.9
Inventories	554.8	928.1	993.2	1,346.8	1,534.5
Trade receivables	683.1	807.9	1,138.0	1,471.9	1,335.3
Cash & bank	4.7	6.7	188.1	359.0	386.9
Other CA	154.0	186.6	134.8	199.0	280.4
Total Assets	**1,541.2**	**2,182.5**	**2,650.3**	**3,578.6**	**3,713.1**

*H1 FY27 = six months to 30 Sep 2026, not comparable with full years. Sep-26 = half-yearly statement of assets and liabilities.

Established in 1995.

AT A GLANCE

1995
Year established

4
Business verticals

30+
Global brand partnerships

77
COCO stores, 4 states

13 · 8
Warehouses · cities

ABOUT THE COMPANY



DISTRIBUTION
₹2,578 Mn
33.6% of revenue · **+1.2%**



RETAIL (COCO)
₹1,800 Mn
23.4% of revenue · **+35.0%**



E-COMMERCE
₹1,426 Mn
18.6% of revenue · **(19.1%)**



EXPORT
₹1,921.4 Mn
25.0% of revenue · **+717.6%**

All vertical figures H1 FY27, growth vs H1 FY26.

Profile: Pan-India consumer-electronics distributor and omni-channel retailer, in operations since 1995. Under CMD Mr Gaurav Goel the Company partners with Samsung, Apple, Dell, HP, Lenovo, ASUS, Oppo, Vivo, Realme, Xiaomi, Motorola, Tecno, Infinix and boAt across smartphones, IT hardware and accessories. H1 FY27 was the highest half-year in its history.

Services: Four verticals: Distribution (Tier-I authorised mandates), Company-Owned Retail (COCO stores), E-Commerce (marketplace and direct) and Export, run on SAP Business One since April 2025.

Geographic reach: Kolkata, Delhi-NCR, Bengaluru, Hyderabad, Lucknow, Mumbai, Gurugram and Noida. 77 COCO stores over ~38,125 sq. ft. at 30 Sep 2026.

REVENUE	EBITDA	PAT	ROE	ROCE
₹7,683.6 Mn	₹181.6 Mn	₹100.9 Mn	15.9%	11.2%
+31.0% YoY	+24.0% YoY	+57.1% YoY	TTM, Sep-26	TTM, Sep-26

COMPANY'S JOURNEY

THREE DECADES OF DISCIPLINED EXECUTION

1995 – 2009 FOUNDATION

1995	Launched with a focus on servicing, maintenance and LAN/WAN installations
1998–09	Early distribution partnerships with HP, Samsung, Lenovo, Sony Vaio and HCL
2002	Entered retail with the first store in Kolkata
FY07	**Crossed ₹50 Cr revenue**

2010 – 2015 RETAIL EXPANSION

2011	Six Kolkata stores; diversified into mobile distribution
2013	Launched e-commerce on Snapdeal, Amazon and Flipkart
FY13	**Crossed ₹200 Cr revenue**

2016 – 2020 GEOGRAPHIC SCALE-UP

2016	New offices in Durgapur, Midnapur and Murshidabad
2017	First store outside West Bengal (Delhi); operations in Delhi, Telangana, Karnataka
2018	Expanded into Bhiwandi, Maharashtra
FY18	**Crossed ₹400 Cr revenue**

2021 – TODAY LISTED & SCALING

2021	Distribution office in Gurgaon, Haryana
Jan 2023	Listed on the BSE SME platform via IPO
2023	Entered Uttar Pradesh with a Lucknow office
FY24	**Crossed ₹1,000 Cr revenue**
Apr 2025	Migrated from Tally ERP to SAP Business One
FY26	Tier-I Samsung Notebooks mandate (WB, Delhi-NCR, UP, Haryana); 24 net new stores to 77
FY26	**Crossed ₹1,300 Cr revenue; record EBITDA ₹306 Mn and PAT ₹142 Mn**
FY26	14 awards from HP, Lenovo, OPPO, vivo, OnePlus, Flipkart and Amazon
H1 FY27	**Highest half-yearly revenue on record at ₹7,683.6 Mn; PAT ₹100.9 Mn**



INDIA SMARTPHONE MARKET

PREMIUMISATION UNDER MEMORY-COST PRESSURE

H1 CY26: 64.2 Mn smartphones (−7.9% YoY) | Q2 ASP US$315 (+14.4%) | Online share 41.9% (46.4%)

Volume down, value up: memory costs push prices higher.

Q2 CY26 · IDC

33.2 Mn
Shipments, −11.1% YoY

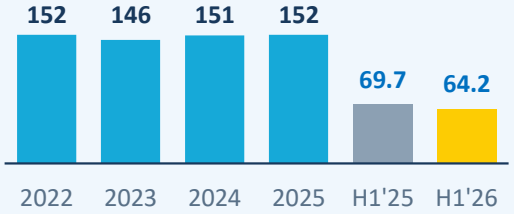
$315
ASP, +14.4% YoY, a record

41.9 %
Online share (46.4% a year ago)

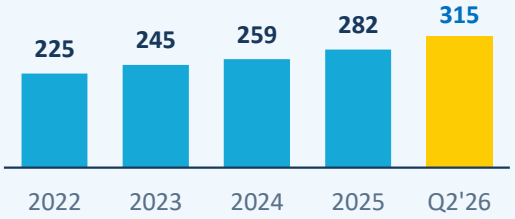
+3.6 %
Market value, YoY

Sources: IDC India Mobile Phone Tracker (Aug 2026); Counterpoint Research (2026). CY22–CY25 as in the H2 FY26 deck.

SHIPMENTS (MN UNITS)



AVERAGE SELLING PRICE (US$)



Premiumisation, not volume
US$400–600 phones +60.3% YoY in Q2 CY26 (share 4.8% → 8.6%); Apple share 8.5% (7.5%), Samsung 16.4%.

Offline holds, online shrinks
Online shipments −19.8% YoY vs offline −3.6%. Supports COCO stores; a headwind for the E-Commerce vertical.

Entry segment collapses
Sub-US$100 phones −74.3% YoY (share 15.6% → 4.5%); US$100–200 flat at 46.8% share. Volume risk for entry brands.

Memory-chip shortage lifts prices
Q2 CY26 shipments −11.1% YoY (IDC), −10% per Counterpoint; ASP at a record US$315, market value +3.6%.

Brand-led omnichannel still wins
Channel margins, in-store promoters and price programmes keep brands investing offline; Tier-I mandates and COCO stores fit.

INDIA IT HARDWARE

COMMERCIAL-LED H1, PRICE-LED SLOWDOWN AHEAD

H1 CY26: ~8.3 Mn PCs (Q1 4.4 Mn, +31.1%; Q2 3.9 Mn, +12.1%), lifted by channel front-loading ahead of price hikes | Omdia: 2H26 −22%, CY26 −2.6% to 15.4 Mn

Commercial-led demand
Q2 CY26 commercial 2.2 Mn (+16.6%) vs consumer 1.7 Mn (+6.6%); enterprise +24.2% in Q1. HP, Dell, Lenovo, ASUS mandates sit here.

AI PC adoption
AI notebooks +96.1% YoY in Q1 CY26 (IDC); AI-capable share of notebooks 28% → 44% (Omdia). Premium mix lifts ticket size.

Samsung Notebooks mandate
Tier-I distribution across West Bengal, Delhi-NCR, UP and Haryana.

Government & education
Q2 CY26 government +17.6% and education +24.8% (IDC); Q1 education +455% on the ELCOT project.

Premium notebooks
Notebooks above US$1,000 +70.1% YoY in Q1 CY26 (consumer premium +92.4%): higher ticket, higher gross profit per unit.

H2 risk: channel inventory
Omdia sees 2H26 shipments −22% as component inflation bites after H1 pre-buying. Watch distributor inventory days.

Q2 CY26 vendor share (IDC): HP 29.4% · Lenovo 20.3% · Acer 14.8% · Dell 14.1% (+40.3% YoY) · ASUS 7.7%

H1 CY26

~8.3 Mn
PCs shipped (Q1 4.4 + Q2 3.9)

+16.6 %
Commercial PCs, Q2 YoY

44 %
AI-capable notebooks (from 28%)

−22 %
Omdia forecast, 2H26 shipments

Sources: IDC India PC Tracker (Q1 and Q2 2026 releases); Omdia (Sep 2026).

RETAIL BUSINESS

Driving growth through a scalable retail platform.

77
Stores

4
States

38,125
Sq. ft. (30 Sep 26)

14
Samsung cafés

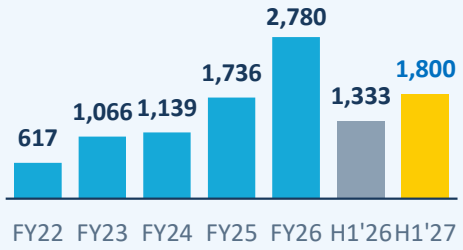
45.7 %
4-year revenue CAGR (FY22–26)



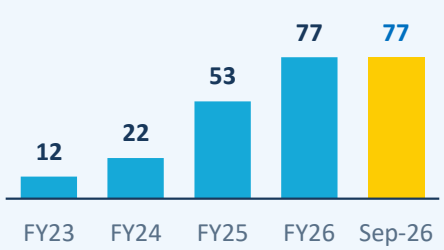
The COCO network is the primary growth engine and margin driver. At 30 Sep 2026 we operate **77 stores** across 4 states (West Bengal, Delhi-NCR, Uttar Pradesh, Haryana) over **~38,125 sq. ft.**, through Multi-Brand Outlets, HP World stores and Samsung Experience Stores.

Retail revenue grew from ₹617 Mn in FY22 to ₹2,780 Mn in FY26 (4-year CAGR 45.7%). H1 FY27 delivered **₹1,800 Mn, up 35.0% YoY**. FY27 guidance: retail revenue growth between 35-40%.

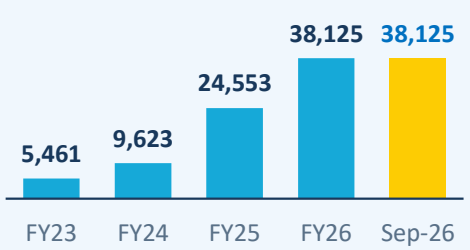
REVENUE (₹ MN)



NO. OF STORES



RETAIL SPACE (SQ. FT.)



Revenue CAGR 45.7% (FY22–FY26): fastest-growing vertical

Stores up 6.4x since FY23 (12 → 77)

Space up 7.0x since FY23 (5,461 → 38,125 sq. ft.)

Samsung, HP, Vivo, Realme exclusives; SAP B1 store-level P&L

A young store base carries earnings still to come.

STORE ECONOMICS

24 / 77
Stores opened since Apr 2025

~60
Days, site to opening

~500
Sq. ft. median store size

1.56x
Monthly sales, stores >12m vs <12m

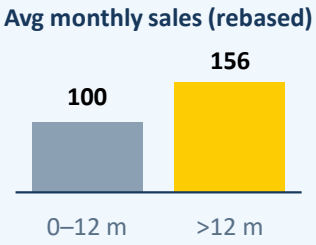
COCO STORES

Rapid Network Build	Standardised store design and a centralised SAP backend: a new store opens in ~60 days from site finalisation.
Profitable Format	Direct-to-brand billing with Samsung, HP, Vivo and Realme captures more margin than distribution; strong accessory and finance cross-sell.
Compact, Capital-Light Footprint	Median store ~500 sq. ft. (range 200–1,200 sq. ft.), keeping rent and fit-out costs low.
Centralised Inventory Discipline	SAP Business One (live April 2025) gives store-level visibility on stock, ageing and margins: faster turns, fewer markdowns.

YOUNG STORE BASE: UPSIDE STILL TO COME

24 of 77
stores opened since April 2025 (24 in FY26)

Stores open more than 12 months average 1.56x the monthly sales of stores under 12 months (Mar-26 cohort data). As the FY26 cohort crosses 12 months during FY27, each store moving up a tier adds to EBITDA.



RETAIL SPACE

GLIMPSES ACROSS FORMATS AND GEOGRAPHIES



SAMSUNG SMARTCAFÉ

Delhi



SAMSUNG EXPERIENCE STORE

Naihati, West Bengal



SAMSUNG STORE

Delhi



GALAXY EXPERIENCE ZONE

Delhi



MULTI-BRAND OUTLET

Delhi (mall format)



ASUS PREMIUM + OPPO

Serampore, West Bengal



MBO, VIVO-LED

Delhi (mall format)



MULTI-BRAND OUTLET

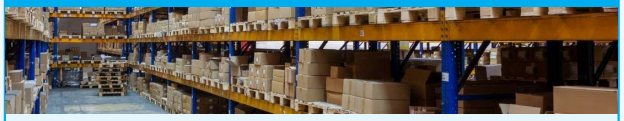
Chinar Park, Kolkata

77	4	38,125	₹1,800 Mn	45.7%
COCO stores	States	Sq. ft. retail space	H1 FY27 retail revenue	Revenue CAGR FY22–26

OTHER VERTICALS

DISTRIBUTION · E-COMMERCE · EXPORT

DISTRIBUTION 01

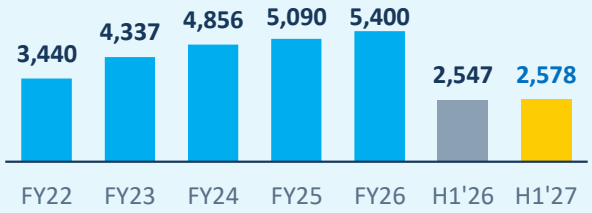


₹2,578 Mn 33.6% share **+1.2% YOY**

11 states · 3,000+ retail partners · HP, Samsung, Dell, ASUS, Lenovo, Infinix, Brother

- 13 warehouses, pan-India network
- Tier-I Samsung Notebook Mandate
- Exclusive: Infinix (Gurgaon), Brother (WB)
- FY27: Tier-II/III push, high single digit

REVENUE (₹ MN) · CAGR 11.9%



E-COMMERCE 02

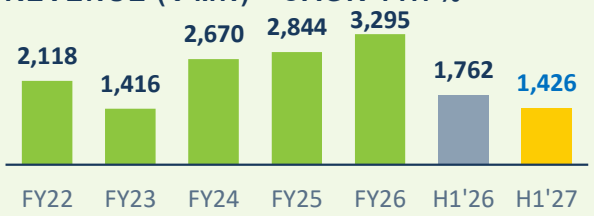


₹1,426 Mn 18.6% share **(19.1%) YOY**

13 warehouses · Amazon, Flipkart, OnePlus, Realme, HP, ASUS, Lenovo

- Digital-first, disciplined working capital
- Smartphones, laptops, peripherals
- Exclusive brand programmes, sale events
- Amazon STEP Hero Award 2026;
- Flipkart FlipStars Award 2025

REVENUE (₹ MN) · CAGR 11.7%



EXPORT 03

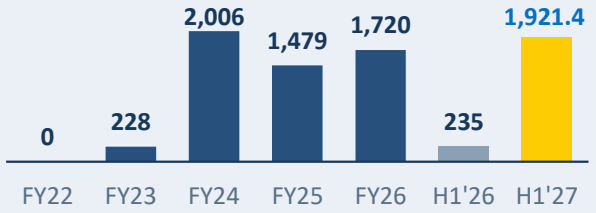


₹1,921.4 Mn 25.0% share **+717.6% YOY**

Smartphones and laptops · Middle East · selective volume

- Longer working-capital cycle than domestic
- Lower ROCE than retail and e-commerce
- Capital shifted to retail and digital
- Active but selective: value over volume

REVENUE (₹ MN) · CAGR 96.1% (3-YR)



FUTURE OUTLOOK

FY27 GUIDANCE AND THE ROAD TO 500 STORES

We are on track to deliver our FY27 guidance of double-digit revenue growth, with EBITDA margin within the 2.0–3.0% range.

REVENUE GROWTH · H1 FY27

+31.0%

FY27 guidance: double-digit growth

EBITDA MARGIN · H1 FY27

2.4%

FY27 guidance: 2.0–3.0% range

RETAIL REVENUE · H1 FY27

+35.0%

FY27 guidance: growth above 50%

RETAIL STORES

77

COCO stores, 30 Sep 2026

During H1 FY27, the Company maintained its retail network at **77 stores**, spanning approximately **38,125 sq. ft.**, consistent with the store count as of March 31, 2026.



LONG-TERM GOAL

500

store network

A 500-store omni-channel retail network across urban and Tier-II catchments, with calibrated growth in Distribution, E-Commerce and Export.

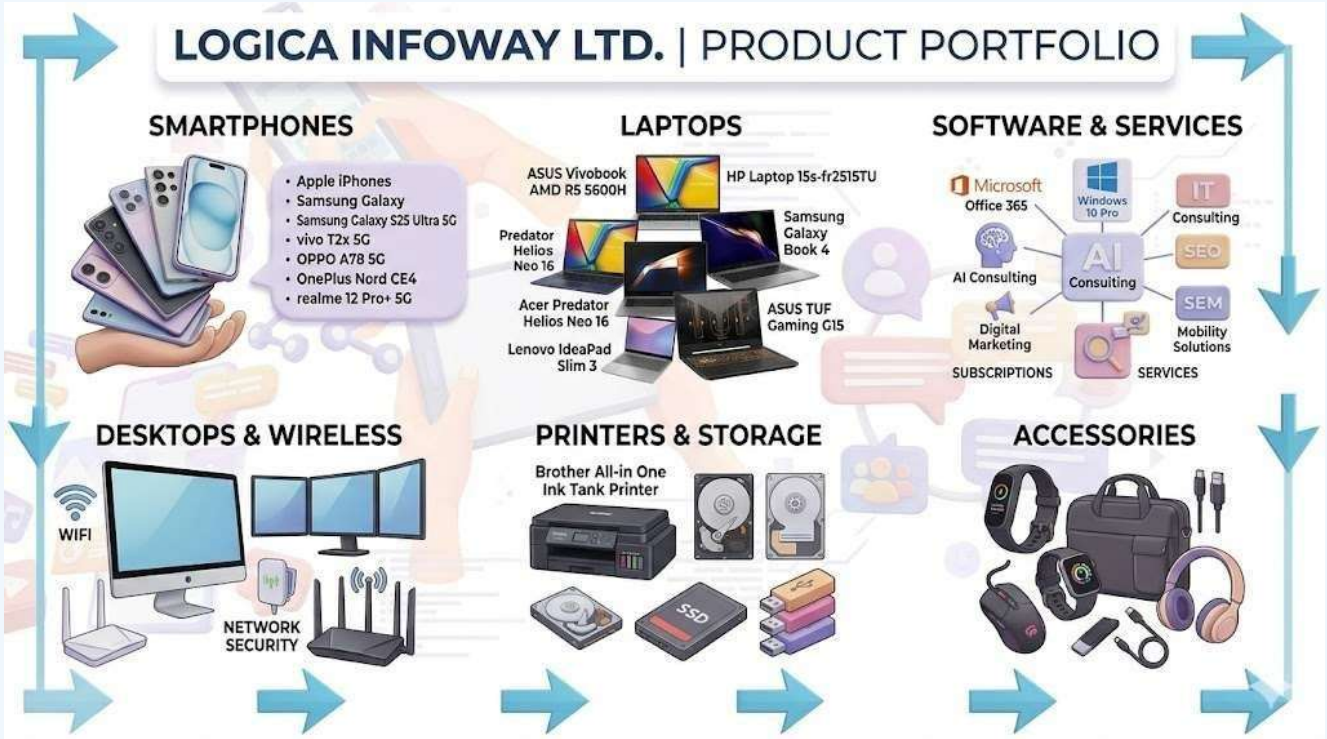
Distribution high single-digit · H1 +1.2%YoY

E-Commerce high single-digit · H1 (19.1%)YoY

Export selective · H1 +717.6%

PRODUCTS PORTFOLIO

30+ GLOBAL BRANDS ACROSS SMARTPHONES, IT AND ACCESSORIES







IN OUR STORES

Smartphones, laptops, desktops, printers, storage, wearables and accessories from Apple, Samsung, HP, Dell, Lenovo, ASUS, vivo, OPPO and more.

OUR PARTNER BRANDS

6 TIER-I / EXCLUSIVE MANDATES · 30+ GLOBAL BRANDS

SIX EXCLUSIVE AND TIER-I PARTNERSHIPS

Tier-I Mandate + Experience Stores
Notebooks Tier-I Mandate : 14 Samsung cafés

Distribution + HP World Stores
Tier-I distribution; dedicated HP World stores

Direct Billing + MBO Format
Direct billing; vivo-led MBO displays

Direct Billing Arrangement
Direct billing across the MBO network

Exclusive Distribution
Exclusive rights in Gurgaon since FY26

Premium Retailer Format
Brand-exclusive format, co-located with OPPO

PLUS 30+ GLOBAL BRANDS

Also: Acer, AVITA, Fire-Boltt, itel, Lava, Micromax, Noise, Nokia, Redmi, TCL, VAIO and others; authorised mandates across smartphones, IT hardware, accessories and software.

Building the retail-led operating backbone.

TOTAL HEADCOUNT

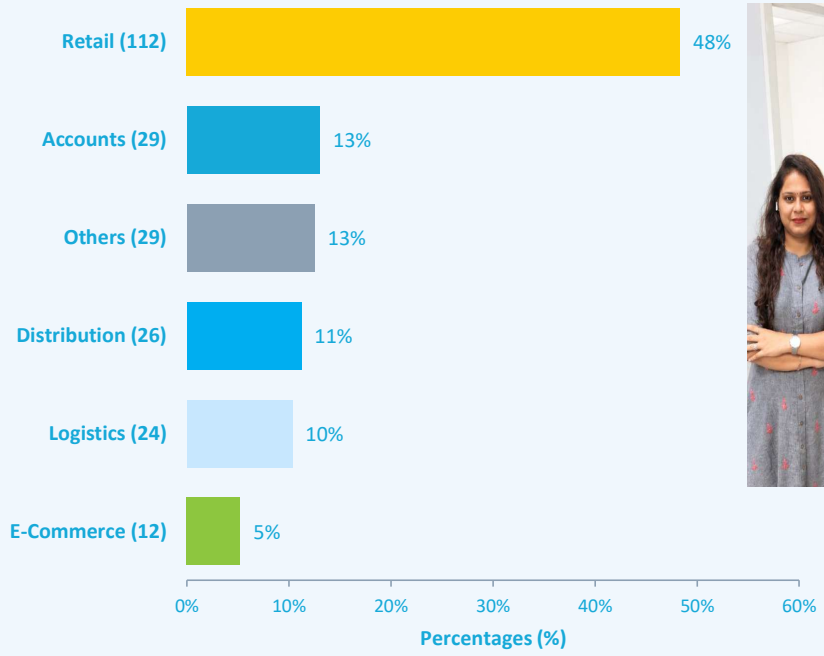
232

Employees as at 30 September 2026

Retail is **48%** of headcount, reflecting the deliberate investment in the higher-margin retail vertical.

OUR WORKFORCE

EMPLOYEES BY FUNCTION, 30 SEP 2026





The Logica team marks 31 years of the Company.

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 & Compliance officer

SHAREHOLDING PATTERN AS AT 30 SEPTEMBER 2026

SHAREHOLDING MIX

Promoter **71.0%** Public **29.0%**

KEY OBSERVATIONS

Promoter 70.96% , unchanged since preferential Allotment - March 25

Pledge 0.00%

Locked-in 1.71% on 30 Sep 26

Institutions no FII / DII / MF holding

Shareholders 983 as at Sep 26

PROMOTER HOLDING TREND

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%**

Corporates 41.19% · Individuals & HUF 29.77%

PUBLIC HOLDING · 29.0%

Category	% Holding
Resident individuals (>₹2L)	**11.18%**
of which Deepak Kumar Agarwal	*2.07%*
Bodies corporate	**9.71%**
of which top 4 corporates	*6.07%*
Individuals (≤₹2L)	**5.10%**
HUF	**2.91%**
NRIs	**0.14%**
Total Public	**29.04%**

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

THANK YOU

THREE DECADES. FOUR VERTICALS. ONE VISION.

INVESTOR RELATIONS

investor.relations@logicainfoway.com

BSE: 543746 | ISIN: INE0BSU01018