

May 27, 2026

The Manager
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Mumbai 400 001
BSE Scrip Code: 532395

The Manager
Listing Department
National Stock Exchange of India Limited
Exchange Plaza, 5 Floor, Plot C/1, G Block
Bandra – Kurla Complex, Bandra(E),
Mumbai 400 051
NSE Symbol: AXISCADES

Dear Sir/Madam,

Sub: FY26 Result Presentation

Please find enclosed Investor Presentation issued by the Company on the financial results for quarter and year ended March 31, 2026.

The above announcement will be made available on the Company's website at www.axiscades.com.

This is for your information and records.

Yours faithfully,

For **AXISCADES Technologies Limited**

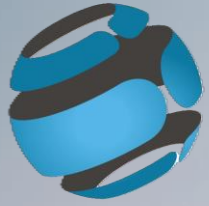
Sonal Dudani
Company Secretary & Compliance Officer

Encl: A/a

AXISCADES Technologies Limited

(formerly AXISCADES Engineering Technologies Limited)

CIN No.: L72200KA1990PLC084435



AXISCADES

NSE: AXISCADES · BSE: 532395

FY26 Year-End Results

Investor Presentation filed with NSE and BSE under SEBI LODR Regulations, 2015

27 May 2026

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Message from the Chairman

Dr. Sampath Ravinarayanan · Founder, Chairman & Managing Director



Dr. Sampath Ravinarayanan

Founder, Chairman & MD

“ FY26 has been the most consequential year AXISCADES has seen – a year in which we moved from intent to execution on the most significant strategic restructuring in the Company's twenty-year history. We set out on Power 930: ₹9,000 crore of revenue and ₹960 crore of PAT by FY2030. Delivering it calls for several significant and deliberate shifts across the Company.

1. Sharpening the portfolio by divesting businesses that were non-core to our growth plan

Earlier this week we signed the divestment of part of our Engineering Services business – the Heavy Engineering, Energy and Automotive practices (~₹239 crore of FY26 revenue) – to Akkodis for US\$30.63 million. This is only the beginning: further restructuring of the engineering services portfolio is underway and planned for H1 FY27.

2. Building capacity and pipeline to support core business growth

While our Devanahalli campus, DAL is already operational, DAC and our Missile Atmanirbhar Complex (MAC) in Hyderabad are becoming operational through FY27, and we have initiated further expansion beyond them. Together they bring manufacturing, testing and MRO under a far larger and more capable footprint – the physical foundation of the next decade. We are also in the late stages of finalizing an aerospace manufacturing acquisition (NBO issued). This acquisition will jump-start aerospace manufacturing activities in Q3 FY27, significantly accelerating our entry into higher-value manufacturing.

To fill the capacity being built, FY26 was also our strongest year yet for building relationships with global OEMs and developing our order pipeline. We carry a strong pipeline into FY27 and have laid a powerful foundation for the revenue engine that will drive Power 930.

3. Expansion into new strategic areas

We have initiated the creation of Xida Inc., our US-headquartered global platform for Deep-tech and AI, into which we are folding our existing ESAI business and AI team. We are in the late stages of finalizing Xida's first acquisition – a business serving marquee hyperscalers and tech-giant customers (NBO issued). We have also established a Space Division. Our Space Situational Awareness (SSA) initiative with Aldoria is underway; we are forging strategic partnerships for space-related manufacturing at DAC, and have begun building the necessary infrastructure.

What emerges from these shifts is a sharper, higher-margin and more strategically aligned AXISCADES. A transformation of this scale is not the work of a single year. What emerges from FY27 onwards is a company transformed – sharp in focus, global in reach and scalable in design. An AXISCADES that operates at the cutting edge of the domains that matter most to India and the world: defence, aerospace, space and Deep-tech-Ai. A higher-margin, higher-value company built not on ambition alone, but on the foundation we laid in FY26.

To every shareholder, customer, employee and partner who has backed us through this year of change – thank you. We built the runway in FY26; FY27 is the takeoff. **”**

Message from the CFO

Shashidhar SK · Group CFO



Shashidhar SK

Group CFO



FY26 was a year where we laid the foundation for Power 930. We focused on divestment of our heavy-engineering, energy and automotive verticals, absorbed one-time transaction costs, and redeployed capital into the higher-value segments that underpin the Power 930 strategy. The reported numbers carry the weight of these decisions. The explanation below sets out, specifically and without qualification, what drove each line item.

Revenue came in at ₹1,159 crores, up 12.4%. EBITDA grew 24.6% to ₹178 crores, with operating margin expanding 150 basis points to 15.3%. PBT was up 30% at ₹114 crores. Reported PAT, ₹72 crores, was down 4.3%. Normalised PAT, adjusted for exceptional items is at ₹83 crores, and when compared to normalized PAT of ₹65 crores in FY25 is up 27.6%.

Three specific factors weigh on the FY26 reported numbers. Each is non-recurring, externally driven, or a deliberate strategic choice. Each is quantified below.

First: *On 26 May 2026, the Company signed a definitive agreement with Akkodis to divest its Heavy Engineering, Automotive and Energy businesses for US\$30.63 million in cash (pre-tax). Transaction and restructuring costs of ₹9.80 crores were expensed directly to P&L, and an exceptional charge of ₹7.98 crores was recognised as a fair value adjustment in the divested businesses. These are one-time, non-recurring charges that will not appear in FY27. The divestment resets the portfolio, releases management bandwidth, and injects liquidity that is being deployed into the higher-margin businesses that forms the core of Power 930.*

Second: *There was a revenue recognition deferment of ₹142 crores in Q4FY26. The causes are external, first-time occurrence and is significant enough to report. A defence manufacturing programme (₹45 crores) and a strategic electronics programme (₹84 crores) were delayed by supply chain disruptions. A further ₹12.60 crores from an Aerospace and Defence contract was deferred to FY27 for transaction specific reasons. The EBITDA impact on the aggregate of this deferred revenue is more than ₹40 crores. This revenue is contracted and certain and is carried forward for revenue recognition in Q1/Q2 of FY27.*

Third : *The tax charge of ₹42 crores in FY26 is not comparable to the ₹12 crores in FY25. The previous year included a one-time tax reversal of ₹10.01 crores arising from a favourable income tax order. FY26 reflects the normalised tax position.*

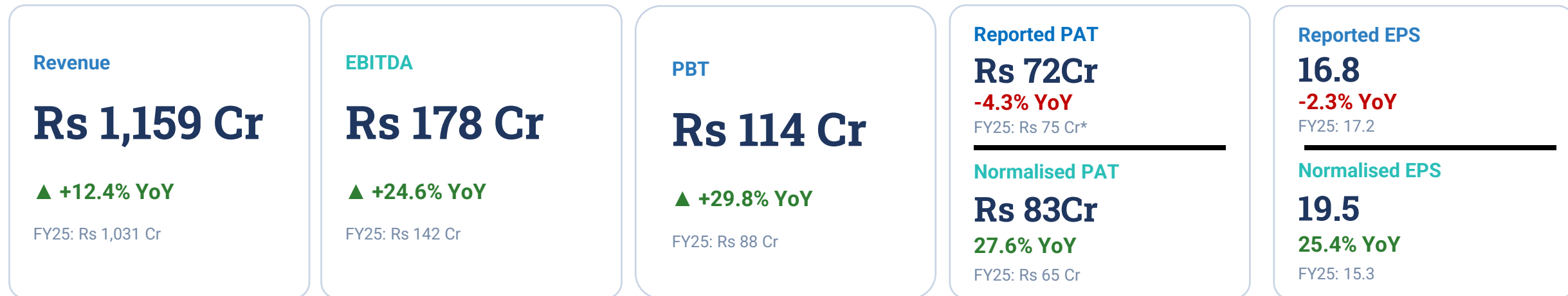
During the year, the Company made targeted capital investments in the DAC, DAL and MAC facilities, the infrastructure that underpins Power 930 programme delivery. The balance sheet enters FY27 with the Akkodis proceeds providing liquidity for continued infrastructure build-out, and without the drag of the divested businesses.

FY27 is structurally different from FY26 - The portfolio is cleaner. The cost base is reset. The deferred revenue for recognition in Q1/Q2FY27 is contracted and certain. The foundation is laid in FY26, FY27 is when it will show.



FY26 Financials

Measured against FY25, FY26 grew on every headline metric – with margin expansion on top



+150 bps

EBITDA margin expanded to 15.3% in FY26, from 13.8% in FY25. Profitability strengthened even through a year of restructuring.






Rs. 9.80 Cr

Non-recurring legal, professional and transaction advisory costs recognised in P&L in FY26, linked to ongoing divestment resulted in reduction in reported EBITDA

Rs. 11.17 Cr

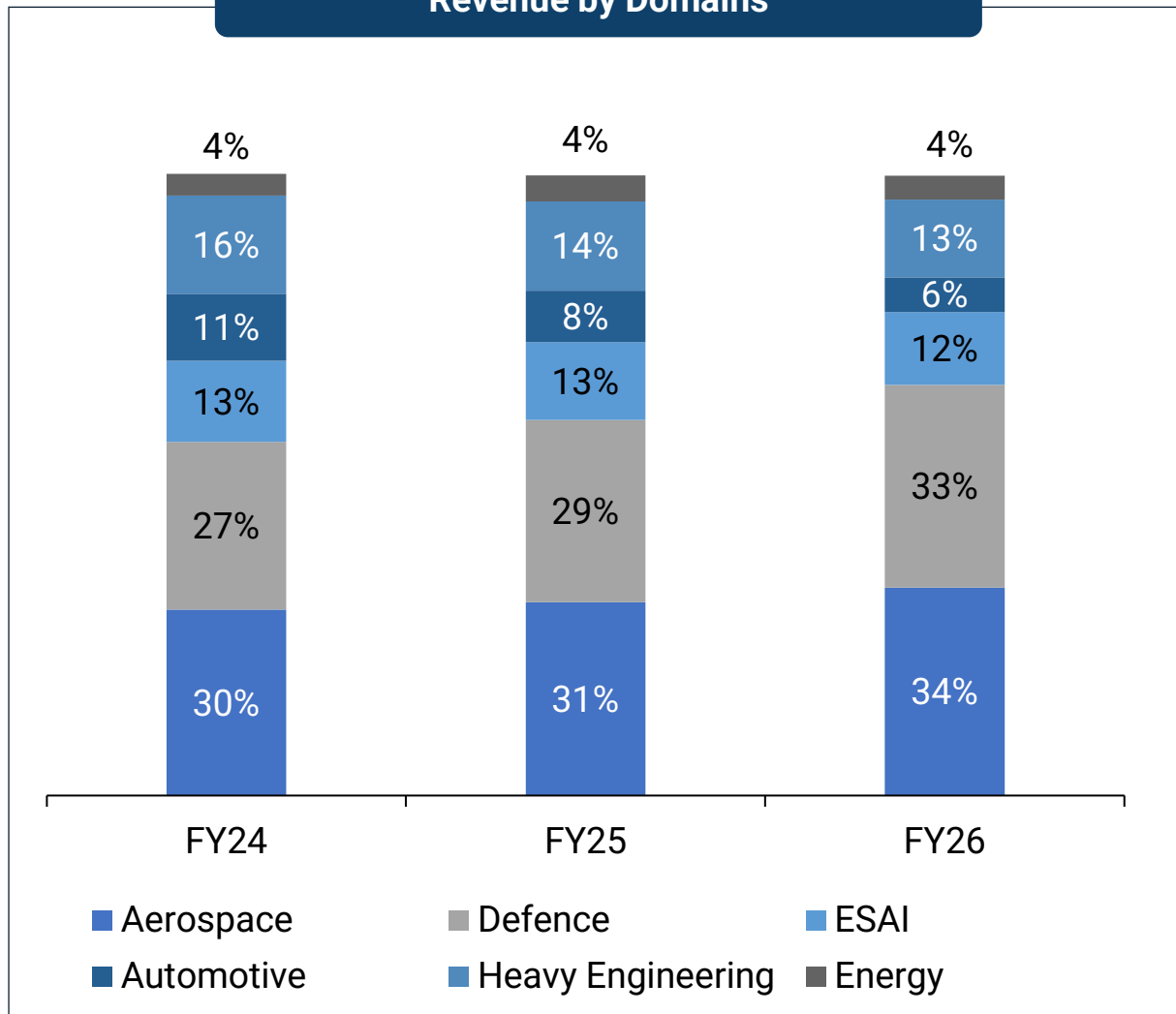
Exceptional charge as a fair value adjustment in the divested businesses and Code of Wages impact resulted in reduction in reported PAT

Consolidated Financial Performance – Q4 & FY26

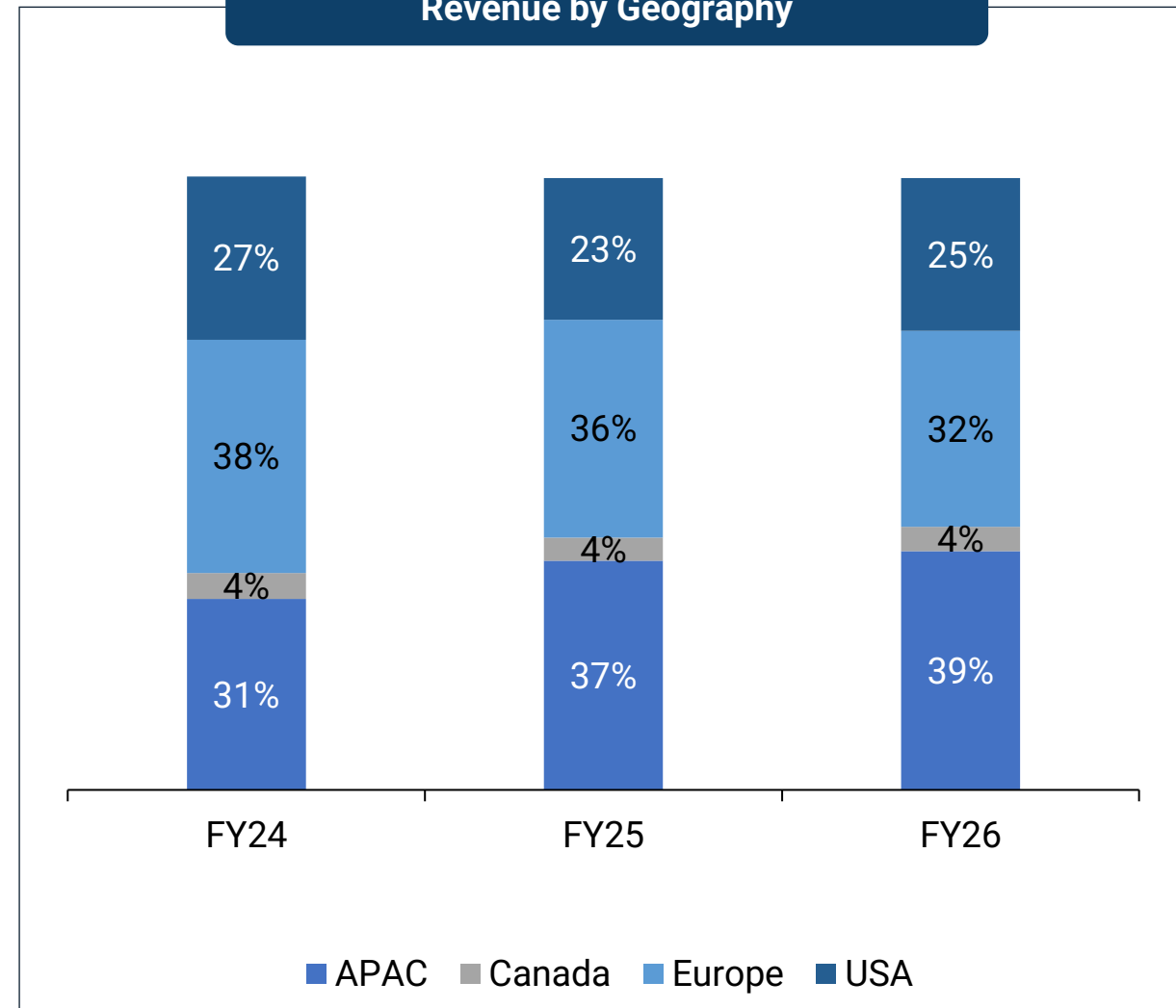
All numbers in INR crores	Q4FY25	Q4FY26	YoY	FY25	FY26	YoY
 Revenue from Operations	268	273	+2.0%	1,031	1159	+12.4%
 EBITDA & EBITDA margin	37 14.0%	34 12.3%	-10.3%	142 13.8%	178 15.3%	+24.6%
 PBT & PBT margin	21 7.9%	11 3.8%	-50.9%	88 8.3%	114 9.6%	+29.8%
 PAT & PAT margin	31 11.6%	0.4 0.1%	-98.7%	75 7.2%	72 6.1%	-4.3%
 Diluted EPS	7.2	0.1	-98.6%	17.2	16.8	-2.3%

Operational Performance – FY26

Revenue by Domains

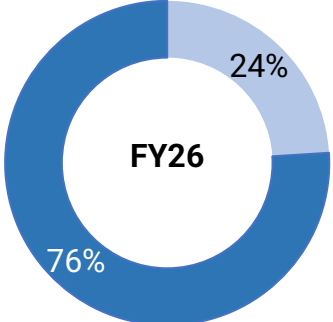
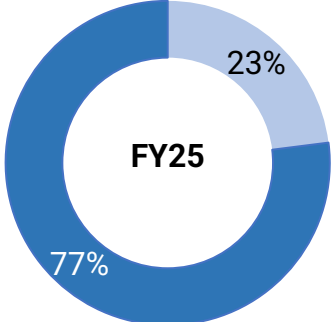
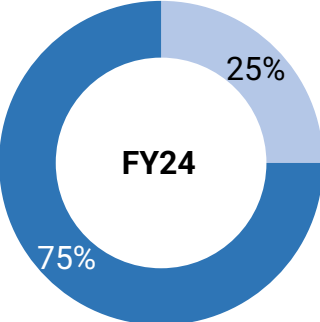


Revenue by Geography



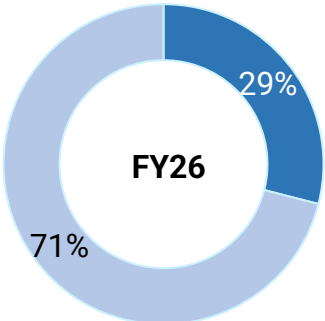
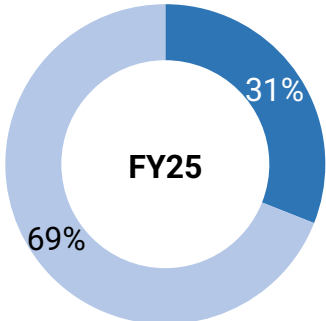
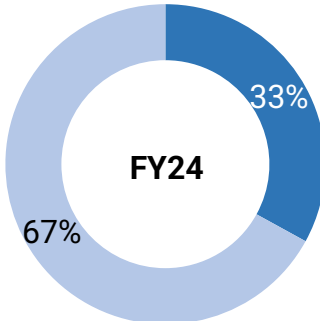
Operational Performance – FY26

Revenue Mix



Onsite Offshore

Revenue by Project Type



Fixed Price Time and Material

Consolidated Profit and Loss Statement



Particulars (in INR Cr.)	Q4 FY25	Q4 FY26	YoY %	FY25	FY26	YoY %
Operating Revenue (\$ Mn)	\$31.4	\$30.9	-1.5%	\$122.7	\$133.2	8.6%
Operating Revenue	268	273	2.0%	1,031	1,159	12.4%
Total Other Income	4	4	11.0%	21	23	9.3%
Total Income	271	277	2.2%	1,052	1,182	12.4%
EBITDA	37	34	-10.3%	142	178	24.6%
EBITDA Margin (%)	14.0%	12.3%	-169bps	13.8%	15.3%	150bps
EBIT	28	20	-29.0%	103	133	29.4%
EBIT Margin (%)	10.4%	7.3%	-	10.0%	11.5%	-
PBT	23	14	-40.8%	91	125	36.5%
PBT Margin (%)	8.6%	5.0%	-	8.7%	10.6%	-
Exceptional Item	-2	-3	68.0%	-4	-11	-
PBT after Exceptional Item	21	11	-50.9%	88	114	29.8%
Tax	-10	10	-200.1%	12	42	239.5%
PAT	31	0.4	-98.7%	75	72	-4.3%
PAT Margin %	11.6%	0.1%	-1,145bps	7.2%	6.1%	-106bps

Consolidated Balance Sheet

Assets (INR Cr.)	Mar-25	Mar-26	Equity and Liabilities (INR Cr.)	Mar-25	Mar-26
Non-Current Assets			Equity		
Property, Plant and Equipment	82	92	Equity Share Capital	21	21
Capital Work-in-progress	0.2	44	Other Equity	628	706
Rights-of-use Assets	138	178	Non-controlling Interest	7	7
Goodwill and Other Intangible	186	199	Total Equity	656	734
Other Non-Current Assets	78	123	Non-Current Liabilities		
Total Non-Current Assets	484	635	Borrowings	109	75
			Lease Liabilities	50	93
Current Assets			Other Non-current liabilities	22	21
Inventories	61	79	Total Non-Current Liabilities	181	189
Investments	52	4	Current Liabilities		
Trade Receivables	302	411	Borrowings	80	201
Cash & Cash Equivalents	52	18	Trade Payables	58	143
Bank Balances other than Cash & Cash Equivalents	37	28	Lease Liabilities	18	19
Other Current Assets	139	291	Other Current Liabilities	134	179
Total Current Assets	643	831	Total Current Liabilities	290	543
Total Assets	1,127	1,466	Total Equity & Liabilities	1,127	1,466

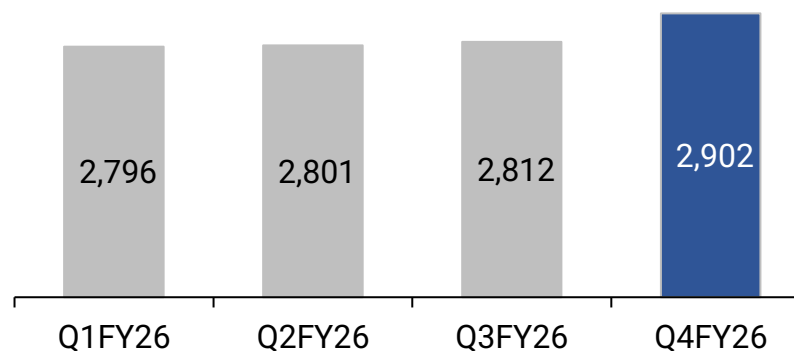
Key Takeaways

- ❖ A reduction in industrial employee metrics are in line with the business model that we have with our customers
- ❖ Core headcount changes quarter over quarter are influenced by the ramp-down of specific programs
- ❖ Enablers / Support include essential leadership and other important hires needed to prepare for FY26

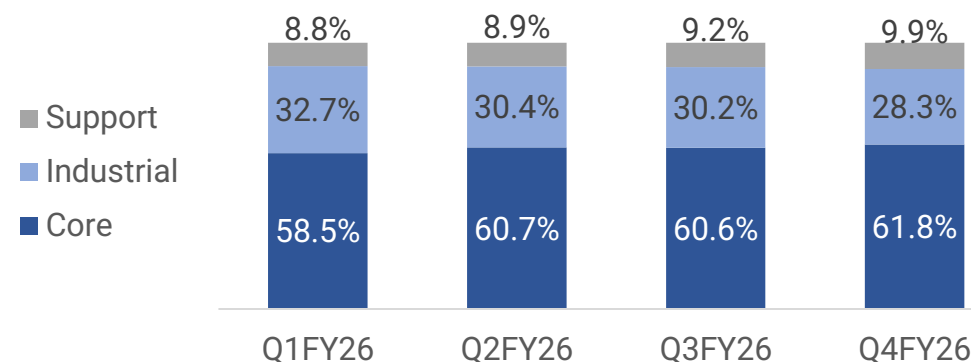
Employee Metrics

	Q1 FY26	Q2 FY26	Q3 FY26	Q4 FY26
Core	1,637	1,700	1,704	1,792
Industrial	913	852	849	822
Support	246	249	259	288
Attrition rate (%)	-19%	-20%	-20%	-19%

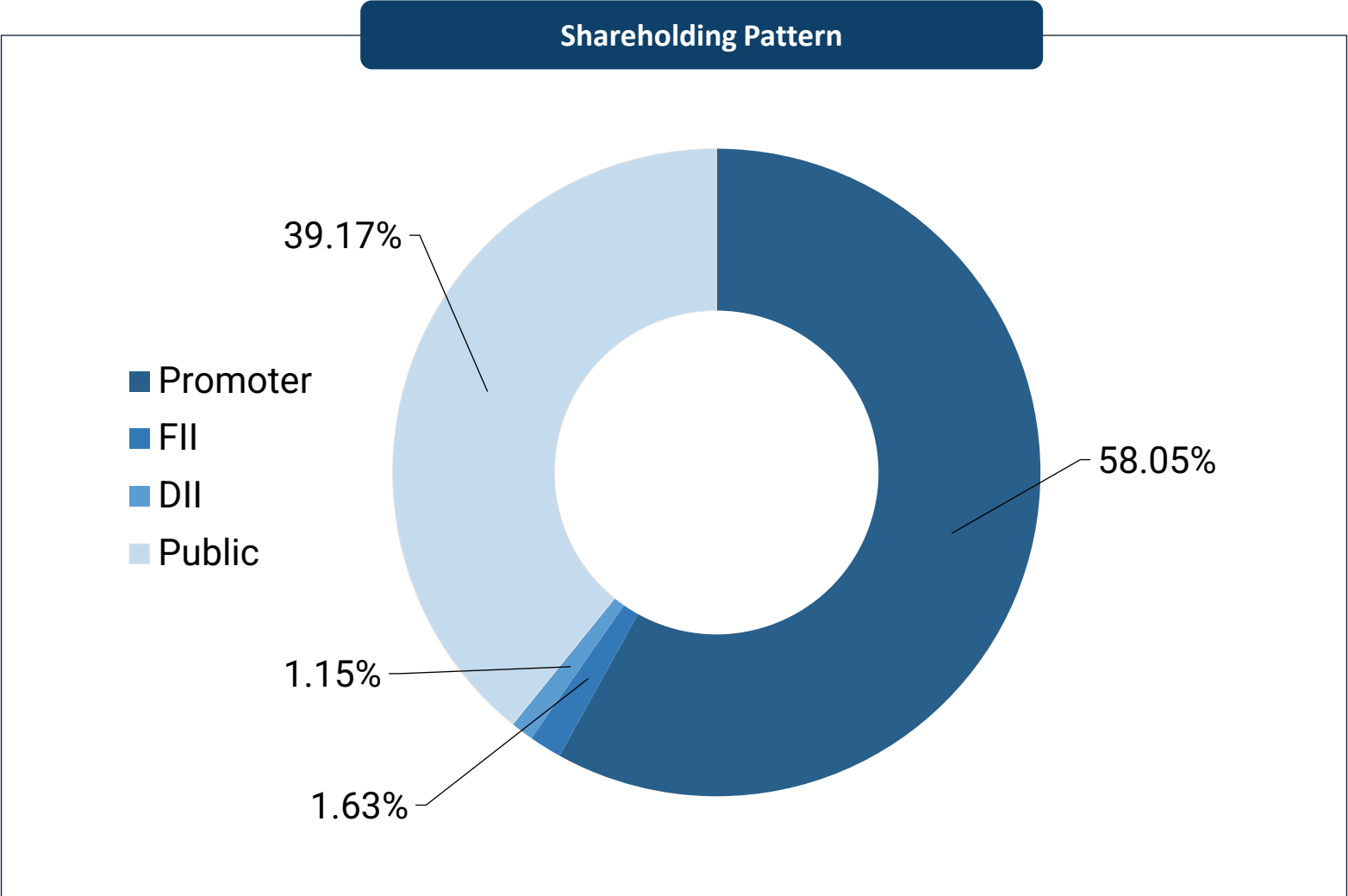
Total Headcount



Headcount by Domains



Shareholding Pattern as of March'26



Building Momentum: FY27 & Beyond

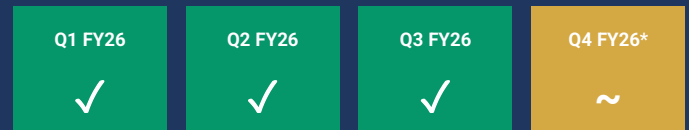
FY27 AND POWER 930 — PILLAR 1



FY26 Performance & FY27 Momentum

Consistent execution track record — Q4 timing shift strengthens FY27 entry

3 consecutive quarters of outperformance



Q4 FY26 — Timing Shift, Not a Demand Shortfall

Q4 revenue reflects a **timing shift**, not a structural or demand issue. Execution was impacted by **global logistics disruptions** and **input material supply constraints** — factors external to the Company and now substantially resolved.

No order cancellations. No customer churn. No demand erosion.

Entering FY27 with Strong Momentum

Affected deliverables have rolled forward as **hard backlog into Q1–Q2 FY27**, providing strong revenue visibility and execution momentum entering the new fiscal year.

Revenue Not Lost

Orders intact — shifted to H1 FY27 as confirmed backlog

Hard Backlog for Q1–Q2

Deferred deliverables provide immediate revenue visibility

Supply Chain Resolved

External disruptions substantially addressed; execution normalised

* Q4 FY26: Revenue target not met due to timing of deliverables; underlying demand and order position remain fully intact.

Active Defence Design / Program Wins – FY26 Consolidated View

21 active programmes across air defence, surveillance, EW and platform upgrades

<p>01 Electronic Control Unit <i>Fighter aircraft upgrade programme</i></p>	<p>08 ELINT Receiver SDER <i>EW & surveillance programmes</i></p>	<p>15 Signal & Data Processing <i>Short-range air defence programme</i></p>
<p>02 Sonar Subsystem <i>Submarine platform</i></p>	<p>09 Lens Array Antenna <i>Multi-platform: Radar, EW, SATCOM</i></p>	<p>16 Exciter & Receiver (ERP) <i>Fighter aircraft platform</i></p>
<p>03 Exciter & Receiver Unit <i>Fighter aircraft AESA radar</i></p>	<p>10 DRFM Controller <i>Naval EW programme</i></p>	<p>17 Antenna Beam Control <i>Fighter aircraft radar upgrade</i></p>
<p>04 Digital Beam Forming Unit <i>Long-range air defence programme</i></p>	<p>11 X-Band Exciter Receiver <i>Drone Detection Radar (Tile config)</i></p>	<p>18 Through-Wall Radar <i>Handheld tactical – 2D and 3D</i></p>
<p>05 DTM & DRM <i>Long-Range Surveillance Radar</i></p>	<p>12 Direct RF TR – 32 Ch <i>Advanced Drone Detection Radar</i></p>	<p>19 Exciter & Receiver (ERP) <i>Indigenous fighter platform</i></p>
<p>06 ODTRM & ODRM <i>S-Band radar programme</i></p>	<p>13 Direct RF TR – 68 Ch <i>Advanced Drone Detection Radar</i></p>	<p>20 Custom RF + 3U VPX SBC <i>Radar Warning Receiver – fighter platform</i></p>
<p>07 Other Subsystems (DF, Sonar, SBC, RPU) <i>Ground, Submarine and Fighter aircraft upgrade</i></p>	<p>14 Mobile Mast System <i>Ground platform</i></p>	<p>21 Mobile Firing Platform <i>Weapon Test System</i></p>

L1 Wins – Modernizing Indian army

Positioned as system integrator for Indian Armed Forces modernisation programmes

L1 Winner · Competitive bid won in both programmes — contract award in progress

Navigation System for Armoured Recovery Vehicle (ARV)

L1 – Bid Won **Contract Award Awaited**

System Capability

Rugged GPS/INS hybrid navigation system with **anti-jamming and anti-spoofing capability** for reliable positioning in GPS-denied and combat environments.

Scope of Supply

Hardware, integration with ARV electrical and communication architecture, environmental testing, training, lifecycle support including spares, documentation, warranty and maintenance.

Scale & Opportunity

Current Order 78 ARVs/10.5Cr	Addressable All Army Tanks	Lifecycle Multi-Year
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Potential extension to entire armoured fleet offers significant scalability and long-term business opportunity.

105mm Gun Proof & Testing Platform

L1 – Bid Won **Contract Award Awaited** **ARDE, Pune**

Scope of Development

Design & supply of **cradle and saddle with mobile trolley for gun mounting** — enabling proof testing of 105mm Indian Light Tank (ILT) sub-assemblies.

Testing Capability – Assemble, Fire, Analyse & Deploy

Gun Barrel	Muzzle Brake	Breech Mechanism	Recoil System
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Scale & Opportunity

Value / System ₹1.02 Cr	Repeat Orders Expected	Strategic Entry Gun Systems
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Entry into gun systems domain — positions AXISCADES for follow-on orders and broader artillery programme participation.

Both programmes awarded through competitive bidding. Contract formalisation in progress. Revenue recognition will commence upon contract execution. Forward-looking statements are subject to risks and uncertainties — see Safe Harbor.

Missile Atmanirbhar Cluster Hyderabad – In Pole position for Missile & Modern Warfare Leadership

Laser Directed Energy Weapon (DEW)

Technology Transfer of Laser Weapon

AXISCADES secured a Technology Transfer (ToT) for a 30 KW Laser Directed Energy Weapon system from the Center for High Energy Systems and Sciences -CHESS –a DRDO lab subject to fulfilling ToT conditions.

Missile programs

Missile Integration Execution: The company is executing a complete missile integration project within DRDO premises using its skilled mechanical and electrical manpower.

Augmented Reality(AR) Solutions: AXISCADES has won a project from a DRDO lab and is developing an augmented reality (AR) solution to enhance missile integration, Quality Assurance and training.

Missile Cable Harness Projects: Executing missile cable harness projects for clients like Brahmos and BDL, reinforcing trusted defence partnerships.

Mobile Mast System (MMS)

Rs 6.9 Cr

One unit Supply Order from DRDO

Competitive win against established defence players

What We're Building

A Mobile Mast System for an elevated radar antenna for DRDO-developed and supplied by AXISCADES. This is a complete system delivery.

Why It Matters

The system is the core of some of the most critical air defence systems. Post approval of the first unit, we expect to receive the production requirement. We cannot discuss this further as applications and quantity are classified.

GLOBAL OEM ENGAGEMENT

Missile Launcher Maintenance

End-to-end maintenance support for missile launcher systems supplied by foreign OEMs to IAF

Automated Test Equipment

Delivery of automated test equipment for missile launcher platforms globally

Positions AXISCADES as a strategic defence partner to global OEMs

scope subject to OEM programme requirements & contract terms

Aerospace — Integrated Design-to-Manufacturing Win

AXISCADES's first integrated D&M contract

Customer : EEA Aircraft & Maintenance, S.A - Portugal

Platform : LUS222: new-generation multi-role 19-seat aircraft

AXISCADES has been awarded its first long-term, integrated Design & Manufacturing contract — the complete Electrical Wiring Interconnection System (EWIS) on the program, from design through series production.

The contract combines AXISCADES's aerospace engineering capabilities with its defence - grade wire harness manufacturing expertise — a combination AXISCADES is well-positioned to deliver from its facilities in India.

Why It Matters

Beyond revenue, this program strengthens India's aerospace industrial base — generating skilled employment and advancing domestic design-to-manufacture capability in a high-precision, safety-critical domain. It validates the Company's full-stack aerospace positioning.

LIFE OF THE PROGRAM CONTRACT

US\$100M+

est. over the next 10 years

Scope

End-to-end EWIS — design through series production

Manufacturing

Newly commissioned DAL facility, India

Strategic First

AXISCADES's first integrated Design & Manufacture Program in Aerospace manufacturing

'XIDA' : ESAI Restructured as a Global AI Company

The ESAI division is being repositioned through a parallel inorganic restructuring and organic customer push — anchored by XIDA Inc, a new US holdco; supported by an active acquisition; and validated by tier-1 customer wins already converting into recurring orders.

RESTRUCTURING & INORGANIC

- **XIDA Inc. (xida.ai)** incorporated in the US as the holding company for the global ESAI / AI business.
- **Integration underway** of ESAI's India + US operations and ACTL's 30-member AI team into XIDA Inc.
- **NBO issued** to acquire a US-headquartered company with Vietnam operations and tier-1 marquee customers; due diligence in progress.
- **Second acquisition** in active discussion to broaden the platform.

ORGANIC MOMENTUM — ANCHOR CUSTOMERS



WORLD'S #1 CONSUMER TECH CO.

Dedicated assembly line ready and customer-inspected. Expecting exponential engagement growth.



GLOBAL WIRELESS SEMI LEADER

USD 3.5M recurring production order received. Expected run-rate of at least USD 500K per month.



GLOBAL HYPERSCALER

Acoustic lab set up in support of the engagement. Major step-up in volume expected.



CORE ANCHORS — TI, AXON, APTIV

Relationships strong and continuing to grow across automotive electronics and semiconductor programs.

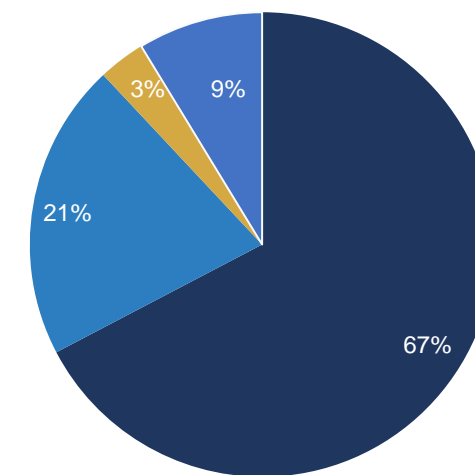
XIDA = globally integrated AI / semiconductor platform. Tier-1 organic orders deliver near-term revenue visibility — independent of pending acquisitions.

Consolidated Revenue Visibility for FY27

Assured Forecast Visibility + active pipeline

Particulars	FY27 Revenue Visibility (Cr)
Orders under execution	927
AFV	285
Acquisition 1 – ESAI	45
Acquisition 2 - AERO	120
TOTAL	1377

FY27 Revenue Visibility



■ Orders under execution
 ■ AFV
 ■ Acquisition 1 -ESAI
 ■ Acquisition 2- AERO

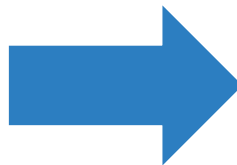
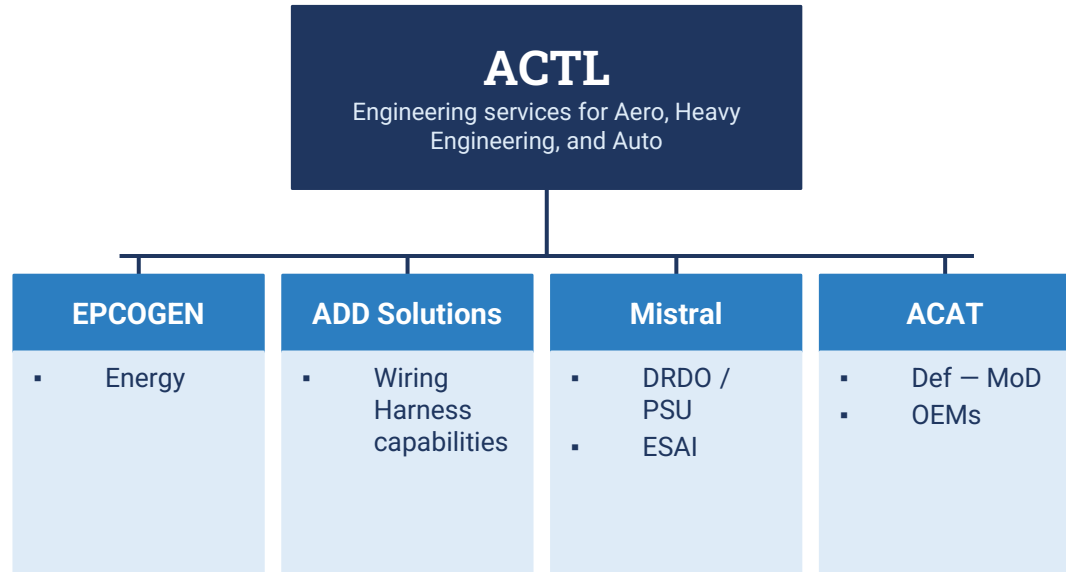
Safe Harbor Statement

This presentation contains forward-looking statements based on current expectations and assumptions of the management of AXISCADES Technologies Limited. These statements involve known and unknown risks, uncertainties and other factors that may cause actual results to differ materially. **AFV (Assured Forecast Visibility)** represents programmes where design has been won and AXISCADES holds qualified sole-source or limited-source supplier status. Production forecasts are based on programme requirements communicated by the customer. Actual orders are subject to customer procurement timelines and budgetary approvals. Pipeline values are probability-weighted and represent addressable opportunities under active pursuit – not revenue projections. **The Company does not undertake to update any forward-looking statement.**

AXISCADES is going through the most significant transformation since foundation

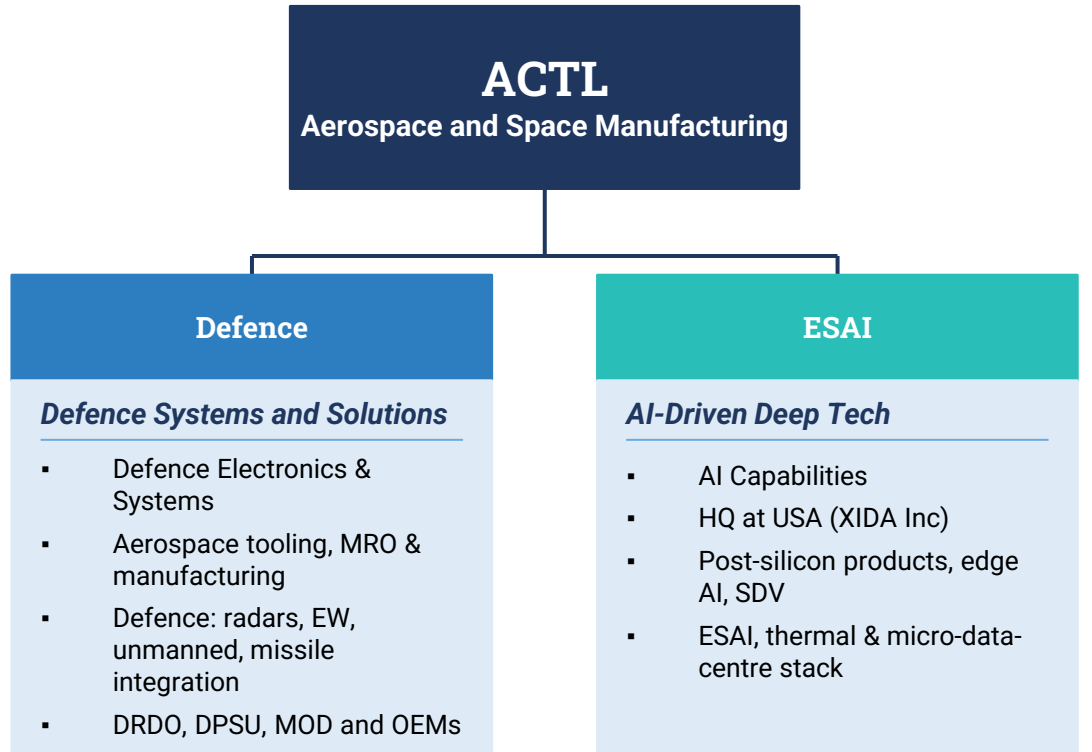
From a fragmented portfolio to a focused two-pillar architecture · FY26 → FY27

BEFORE · End of FY26



*Power 930
Recalibration*

AFTER · End of FY27



Two strategic pillars – focus, scale, and value capture aligned with Power 930.

Capacity Buildout — Physical Backbone of Power 930

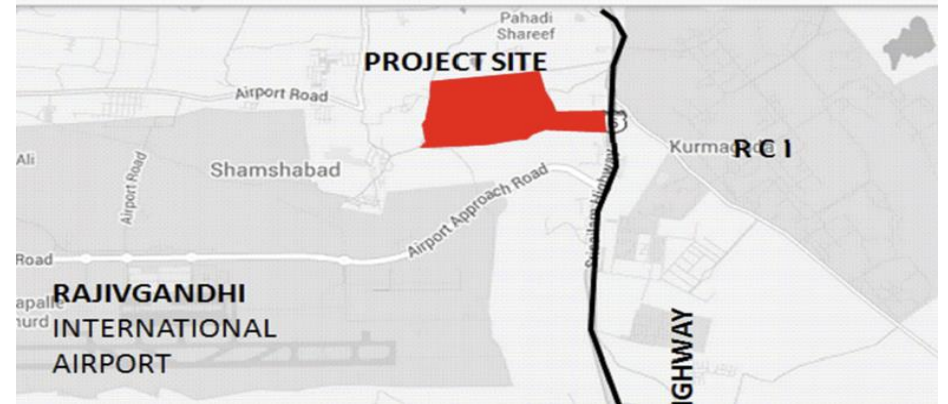


Three clusters sequenced across FY26–FY28 to design, build, integrate, test, MRO and assemble under one platform

DAL Devanahalli Aero Land, Bengaluru · Production live



MAC Missile Atmanirbhar Complex, Hyderabad · Upcoming



DAC Devanahalli Atmanirbhar Complex · In progress; 11 hangars operational by Jan 1st 2027



Capacity is being brought online alongside customer commitments, shifting AXISCADES from services-led delivery to higher-value manufacturing, testing and integration. [Click for tour](#)

Divestment of Heavy Engineering, Energy, and Automotive verticals; signed on 26 May 2026



US\$30.63 million

Divestment of AXISCADES' Heavy Engineering, Energy, Automotive business to Akkodis, a leading global digital engineering consulting company

Why This Transaction – Strategic Rationale

01 Funding the future

Unlocks ~Rs 293 Cr in pre-tax cash – deployed towards Power 930 manufacturing capex (DAC, MAC, MAL), strategic acquisitions, and strengthening the balance sheet.

02 Scalable in vision

Power 930 demands a step change – from Engineering Services into manufacturing and development. AXISCADES endeavors to move up the value chain towards execution of higher-value, higher-margin activities with a scalable model.

03 Sharp in Focus

The company moves from a vastly diversified multi-vertical approach to focus and prioritize high-value strategic segments – Aerospace & Space Manufacturing, Defence Development & Manufacturing, and Deep-Tech AI.

04 Mitigating the Risk

Customer diversification across geographies to deliver balanced, resilient growth. Every acquisition and strategic partnership is calibrated to reduce concentration risk.



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27 May 2026