



CIL/SE/2026-27/12

May 20, 2026

BSE Limited

P.J. Towers
Dalal Street
Mumbai- 400 001

National Stock Exchange of India Limited

Exchange Plaza, C-1, Block G,
Bandra Kurla Complex, Bandra (E)
Mumbai - 400 051

Scrip code: 540710

Symbol: CAPACITE

Sub: Investor Presentation – Q4 & FY26

Ref: Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

Dear Sir/ Madam,

Please find enclosed Investor Presentation for the fourth quarter (Q4) and year ended March 31, 2026.

Kindly take this information on record.

This disclosure will also be available on the Company's website, viz. www.capacite.in.

For any correspondence or queries or clarifications, please write to cs@capacite.in.

Thanking you

Yours faithfully,

For Capacit'e Infraprojects Limited

Rahul Kapur

Company Secretary & Compliance Officer

Encl: a/a

Capacit'e Infraprojects Limited

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CIN: L45400MH2012PLC234318 | www.capacite.in



CAPACIT'E INFRAPROJECTS LIMITED

INVESTOR PRESENTATION

Q4 & FY2026



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Key Highlights

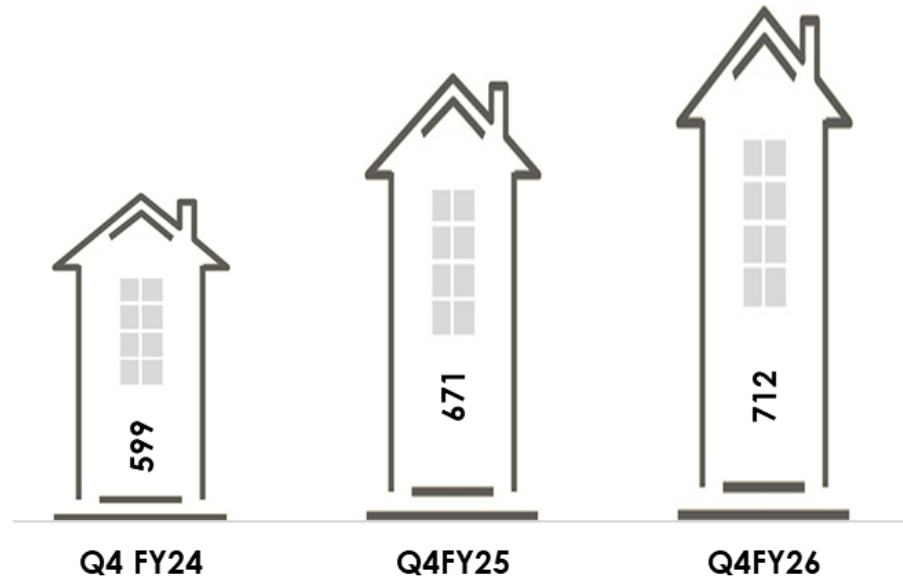


KEY COMPANY UPDATES

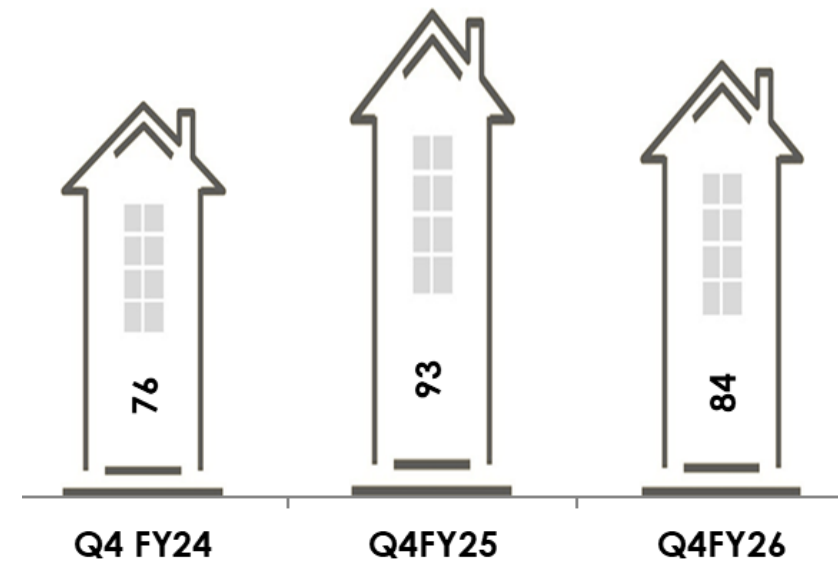
- Order inflow during FY26 stood at **₹4,446 crores**. Exceeds Full-Year Order Inflow Guidance of ₹3,500. Supported by a strong pipeline of quality bids, we remain optimistic about order inflows during FY27.
- The Company has **realized aggregate ₹44 crores during FY26** against disposal of non core assets (properties).
- The Company **expect to sale / realize ₹50 crores in FY27** from sale of non core assets.
- **Significant Reduction in working capital days** (including retention debtors) **by 43 days** on back of improved debtor collection.
- Net Cash from operating activities stood at **₹ 224 crores** in FY26 as compared to ₹ 52 crores in FY25.
- Bank Credit Rating **upgraded to BBB+/ Stable** from BBB/Stable signifying improving credit profile.
- The assessed working capital limits (**Fund Based & Non Fund Based**) **stands fully tied up**, providing clear headroom to boost execution in the coming year. This strengthens our capacity to deliver on growth plans and drive stronger performance ahead.
- Over the last 2 years, the Company has been able to **reduce interest rate from ~12.5% to 9.65%** for Fund Based Limits. Similarly, the Non Fund base commission/charges have also seen **moderation** from **average 2.5% to 1.20%**. The result of the reduction would be fully visible in finance cost for FY27. Further, the current rating upgrade, might result in further rationalization of finance cost.

Q4 & FY26 - PERFORMANCE UPDATES

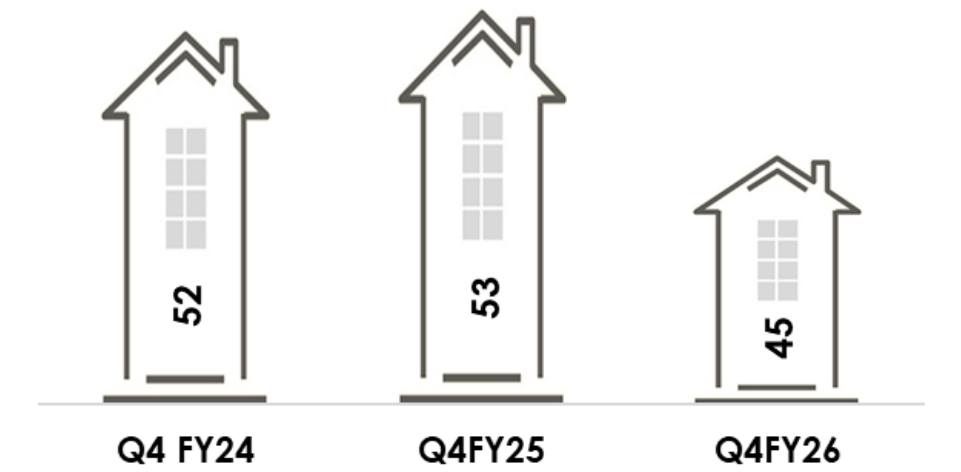
Revenue from Operation (₹ cr)



EBIT (₹ cr)

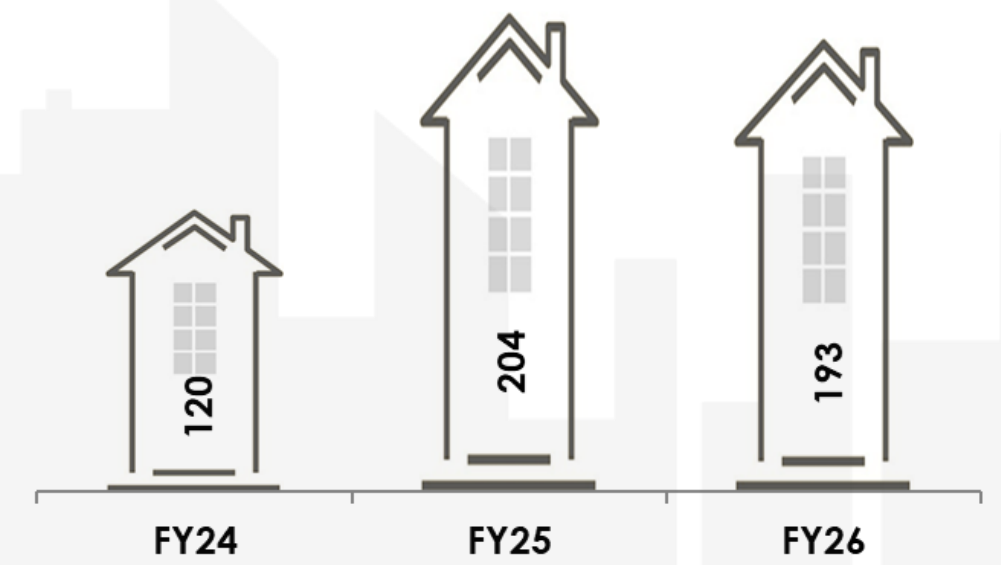
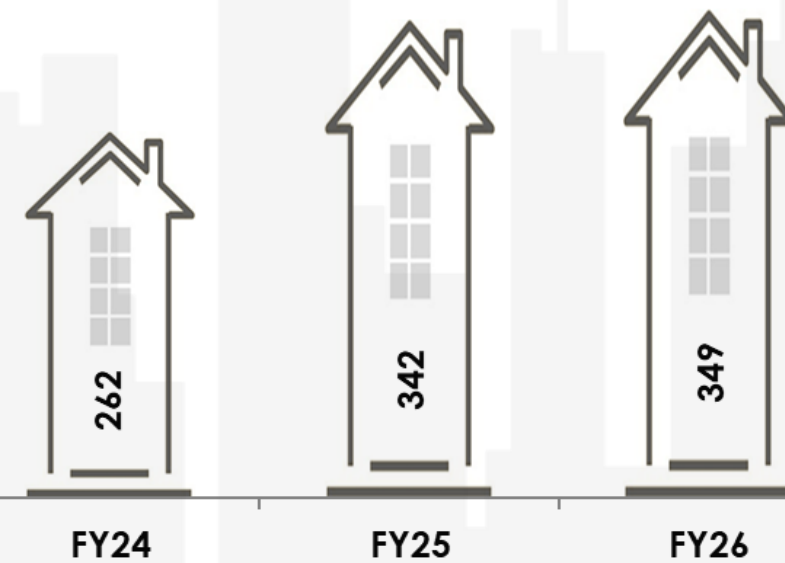
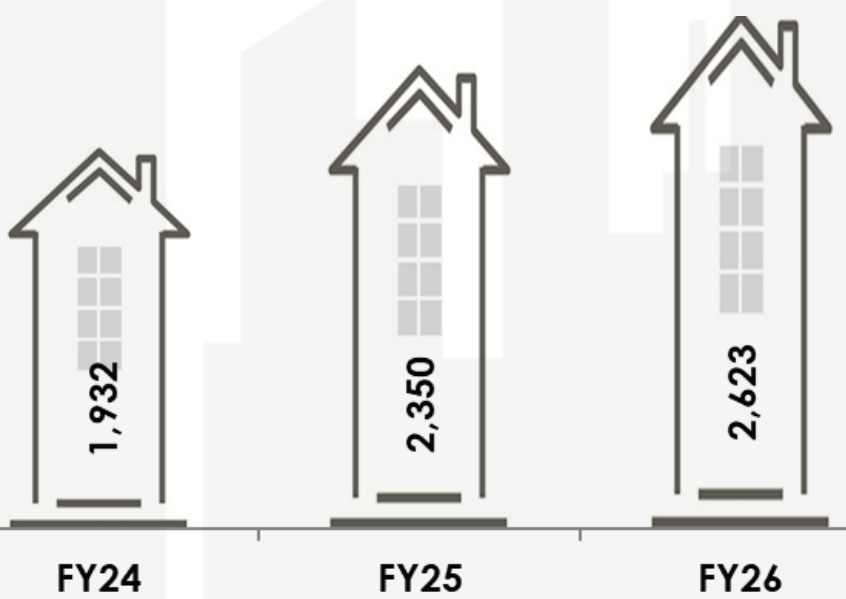


PAT (₹ cr)



Quarter

Year

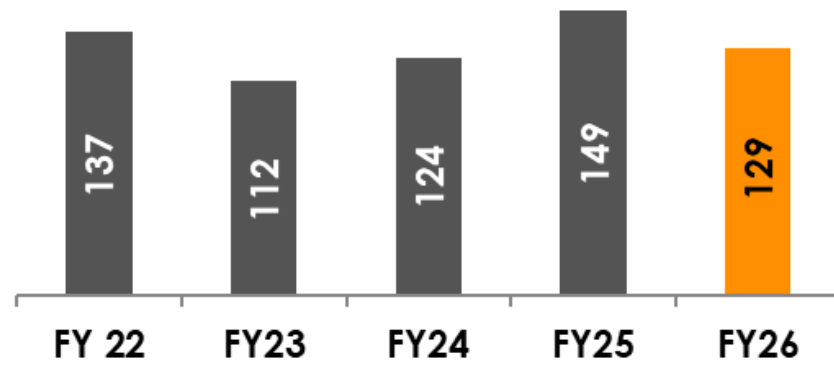


CONSOLIDATED PROFIT & LOSS

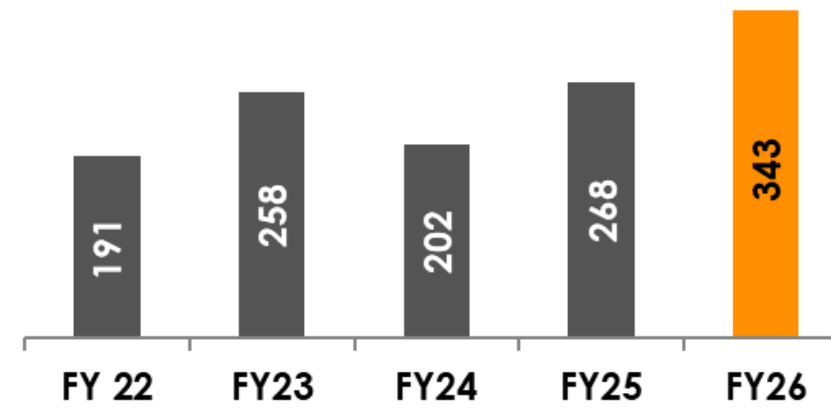
Particulars (₹ In Crs)	Q4FY26	Q4FY25	Y-o-Y	Q3FY26	FY26	FY25	Y-o-Y
Revenue from Operations	711.8	671.3	6%	675.4	2,622.7	2,349.5	12%
Other Income	1.5	33.5		5.2	20.9	57.6	
Total Income	713.2	704.8	1%	680.6	2,643.6	2,407.1	10%
Cost of Material Consumed (Incl.Construction Expenses)	507.7	484.0		476.6	1,852.0	1,621.2	
Employee Expenses	48.8	38.8		46.1	182.3	149.3	
Other Expenses	46.1	62.8		44.5	161.2	199.6	
EBITDA (excluding other income)	109.1	85.7	27%	108.2	427.2	379.4	13%
EBITDA Margin (%)	15.3%	12.8%		16.0%	16.3%	16.1%	
Depreciation	26.9	25.8		23.2	99.1	95.1	
EBIT	83.6	93.4	-11%	90.2	349.0	341.9	2%
EBIT Margin (%)	11.7%	13.3%		13.3%	13.2%	14.2%	
Finance Cost	25.4	24.7		24.1	96.4	93.3	
Share of Profit/(loss) of JV & Associates (net)	1.4	2.1		1.7	6.1	16.6	
Profit before Tax	59.7	70.8	-16%	67.9	258.7	265.1	-2%
Profit before Tax Margin (%)	8.4%	10.1%		10.0%	9.8%	11.0%	
Tax	15.1	17.7		17.4	65.6	61.4	
Profit After Tax	44.6	53.1	-16%	50.5	193.1	203.8	-5%
PAT Margin (%)	6.2%	7.5%		7.4%	7.3%	8.5%	
Other comprehensive income	-0.5	0.4		-0.1	-1.2	-0.8	
Total other comprehensive income	44.1	53.5	-18%	50.3	191.9	202.9	-5%
Cash PAT	99.3	74.5	33%	73.6	318.0	285.4	11%
Cash PAT Margin	13.9%	10.6%		10.8%	12.0%	11.9%	
Basic EPS	5.3	6.3		6.0	22.8	24.1	

CONSOLIDATED DEBT POSITION

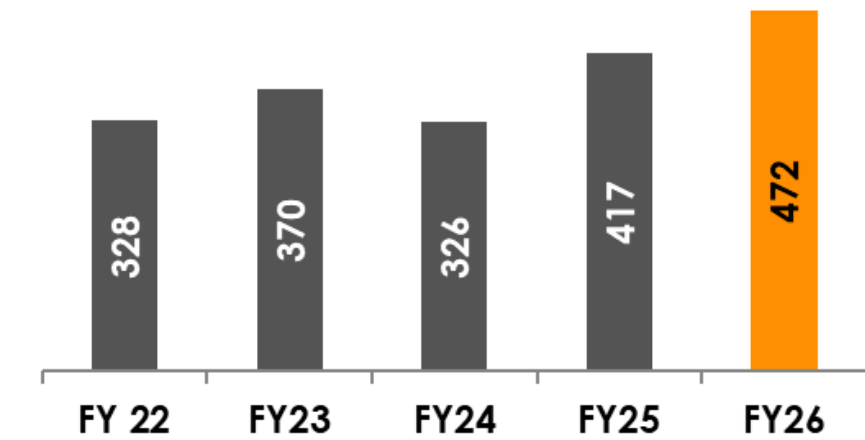
Long Term (₹ cr)



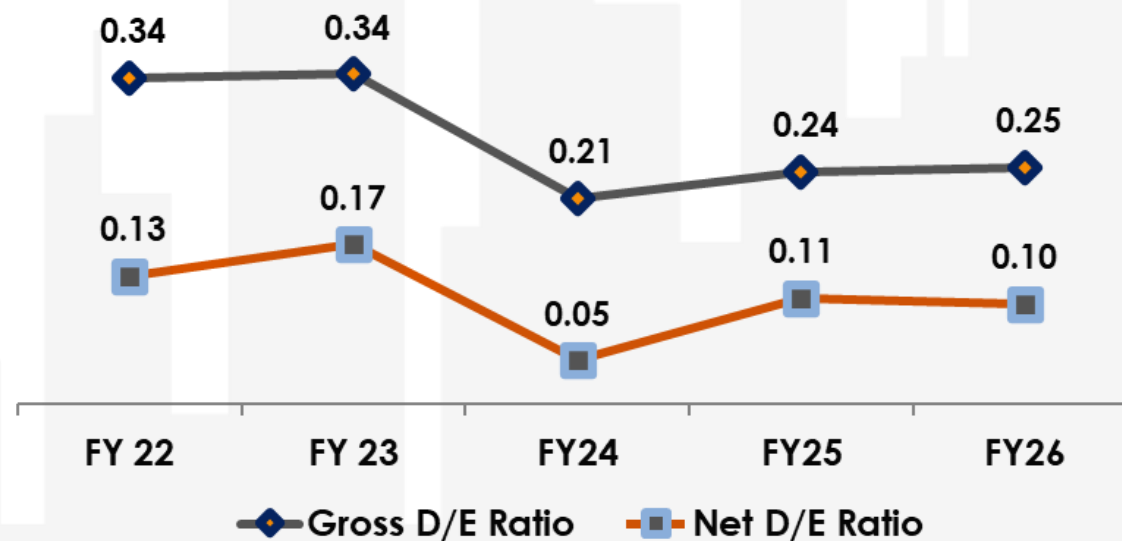
Short Term (₹ cr)



Gross Debt (₹ cr)



Debt Equity Ratio



- Healthy Net debt equity ratio at **0.10x** as on March 31, 2026 as compared to 0.11x as on March 31, 2025.
- Gross debt equity ratio at **0.25x** as on March 31, 2025 as compared to 0.24x as on March 31, 2025.



Corporate Overview



ABOUT CAPACIT'E



Leading Construction Company

Incorporated in 2012, Capacit'e Infraprojects is a focused EPC company that provides an end-to-end construction service for buildings and factories across sectors



Presence across building segments

Presence across Residential building, Commercial building, Institutional building such as Data Centres, Factory building and buildings for educational, hospitality and healthcare purposes etc



Delivery Track Record

Capacit'e single segment focus, customer commitment and delivery track record has helped us to become preferred partner as well as qualify for large public sector projects



Strong and diversified order book

Successfully delivered more than 75+ mn sq. Ft area across segments in the limited operational history of 12 years. Holds Limca Book of Record for fastest hospital construction

SERVICES WE OFFER



RESIDENTIAL BUILDING

- High Rise
- Super High Rise buildings
- Shell & Core Work
- Complete Lock & Key Works
- MEP Works etc.



COMMERCIAL BUILDING

- Malls
- Hotels
- Office Complex
- MLCP
- Complete Lock & Key Works etc



INSTITUTIONAL BUILDING

- Healthcare,
- Data Centre
- Factory Construction
- Metro Stations
- Complete Lock & Key Works etc.

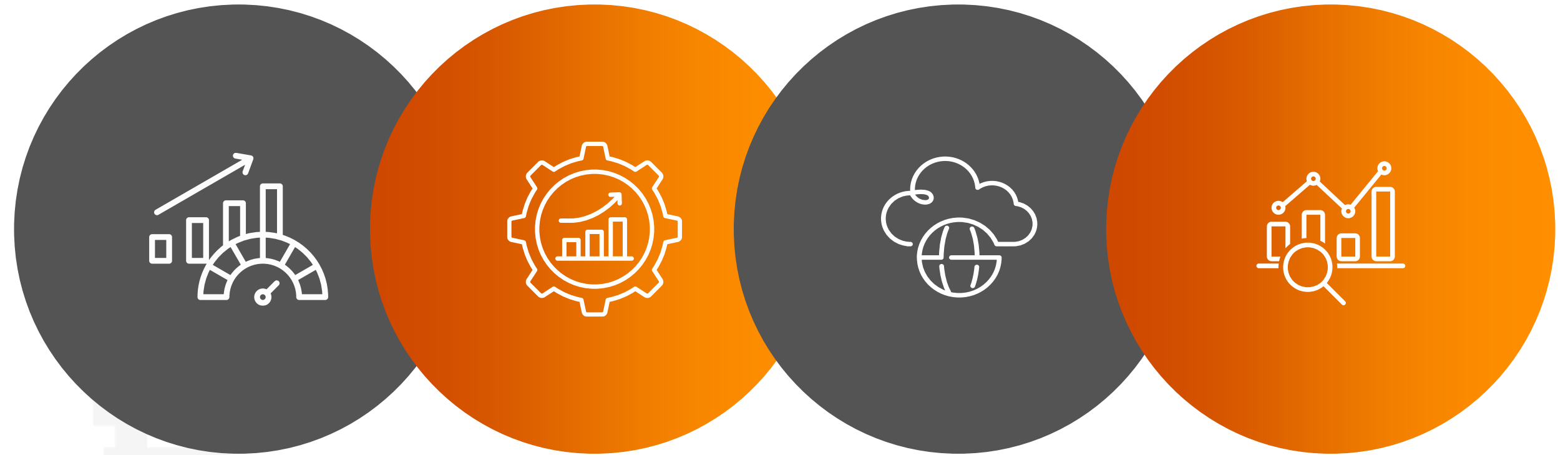


MIXED USE BUILDING

- Townships,
- Gated Community
- Complete Lock & Key Works etc

VISION 2028

VISION



Revenue from Operations
Continue the growth momentum of **20%+ CAGR** to surpass **₹ 4,000 crores** benchmark of revenue in FY 2028

Margin
Maintain a healthy and industry leading EBIDTA margin profile in range of **16% - 17%**

Working Capital
Reducing working capital requirement on absolute basis as well as in terms of number of days.

Debt Levels
Reducing Net Debt level on account of reduction in working capital as well as monetizing of non core assets (**₹50 crore during FY 27**).

KEY STRENGTHS



01

Track Record

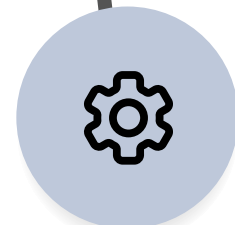
Established presence and track record with focus on building construction



02

Order Book

Large order book with a marquee client base



03

Execution Prowess

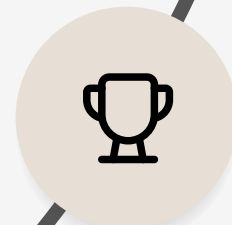
Diversified mix of projects across the building construction horizon



04

Strong Financial

Industry leading margin with focus on maintaining strong balance sheet



05

Experienced Team

Promoters extensive experience coupled with dedicated senior management team

TRACK RECORD



Short History, Strong Footprint:

Our limited operating history has not constrained reach. We have delivered diverse projects across MMR, PMR, NCR, Varanasi, Bengaluru, Chennai, and Hyderabad.



Process Discipline:

Concentrating on Building & Factories construction has allowed us to develop standardized workflows and a professional execution framework, resulting in streamlined operations and improved delivery predictability



Proven Scale:

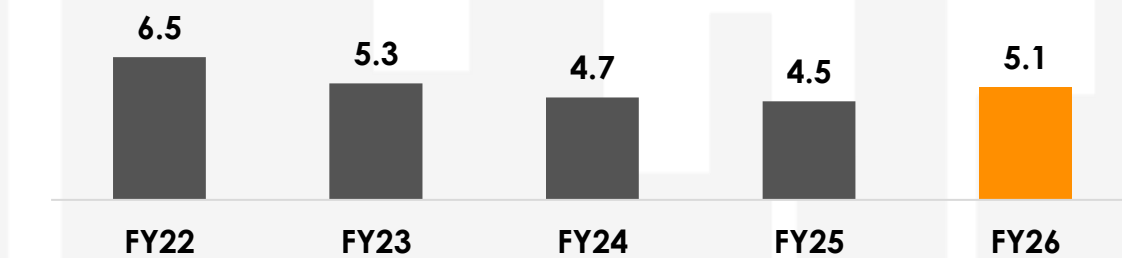
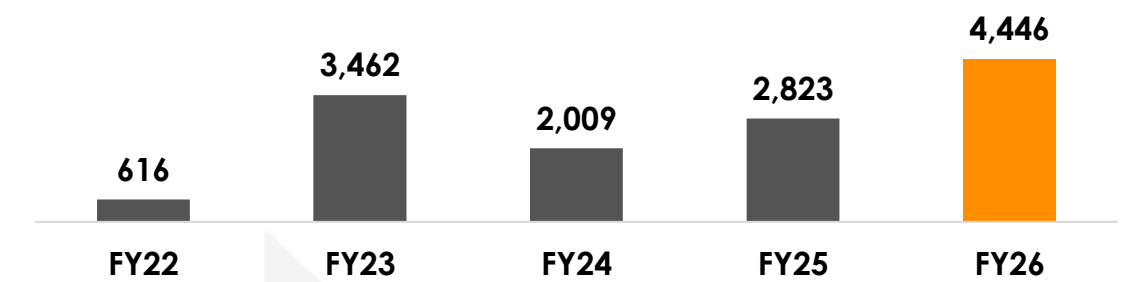
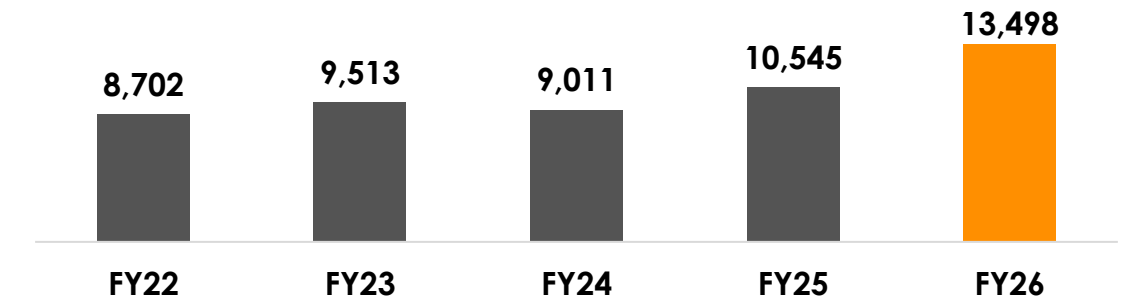
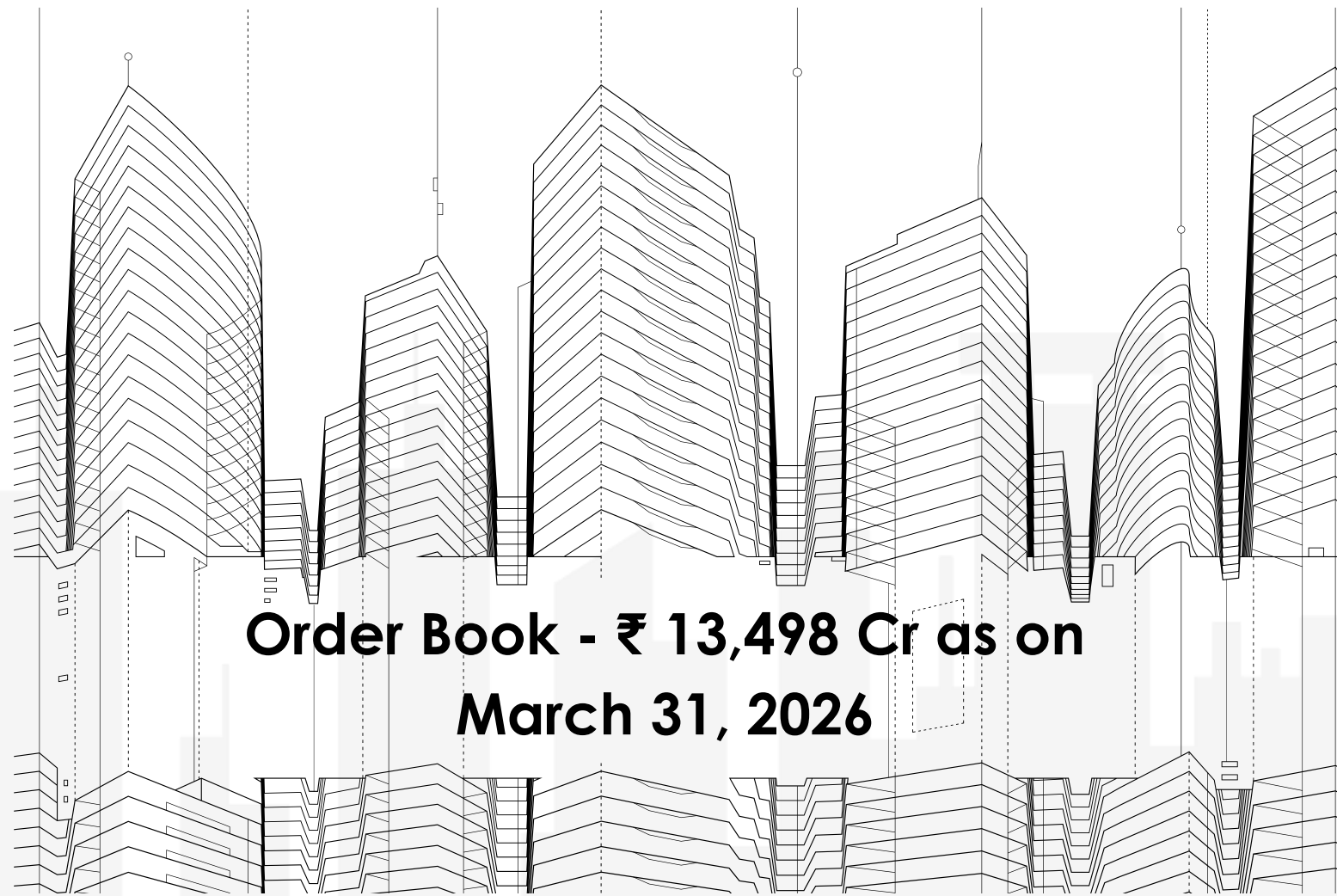
Delivered more than **75 mn sq ft** of constructed area across residential, commercial, and institutional buildings, reflecting our deep expertise in Building & Factories construction.



Prequalification Edge:

Demonstrated expertise in large-scale project execution strengthens our ability to meet bidding requirements and win large potential projects

ORDER BOOK

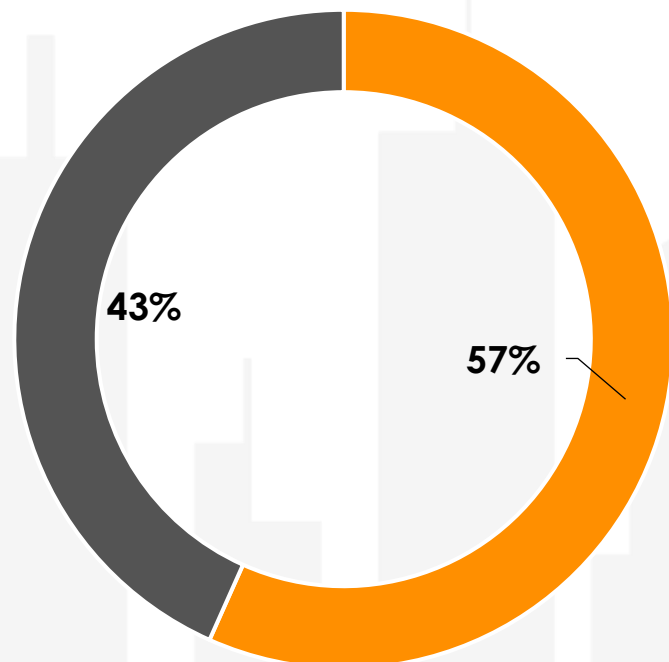


ORDER BOOK ANALYSIS

01



Private v/s Public

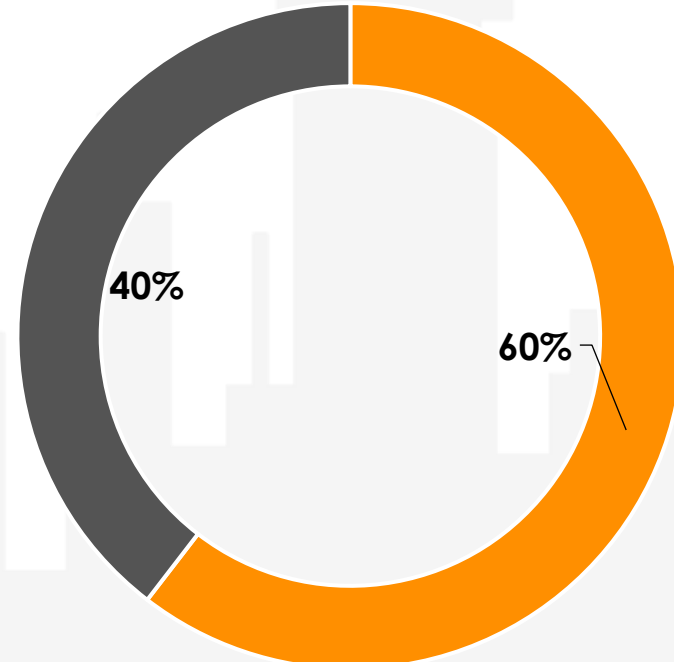


Public Private

02



Project Split

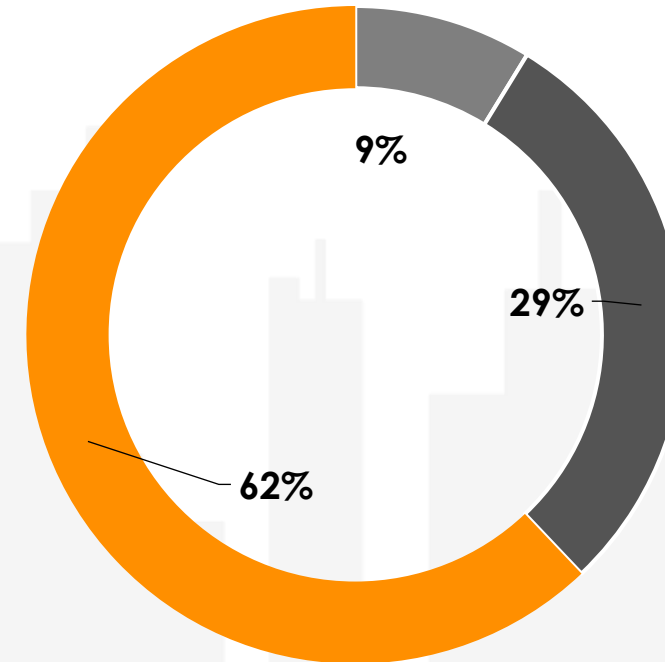


Above 40 Floors Below 40 Floors

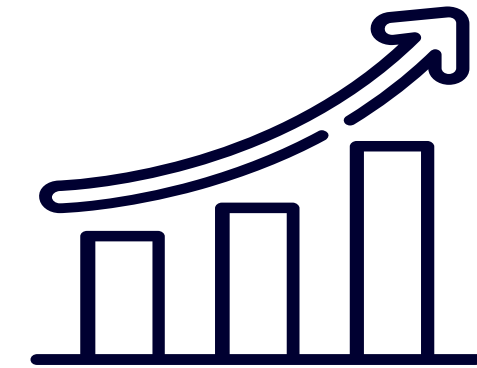
03



Category Split



Institutional Mixed Use Residential

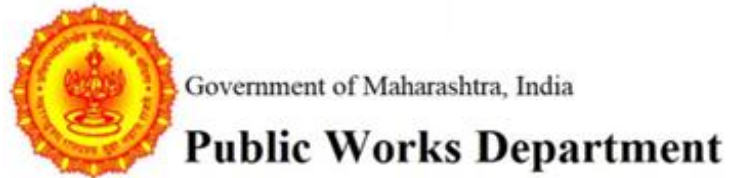


Revenue Uptick

Revenue uptick to accelerate in FY27 and years ahead, driven by robust order book quality and strengthened liquidity - supporting long-term value creation

MARQUEE CLIENTS

PUBLIC SECTOR



PRIVATE SECTOR



STRONG FINANCIAL

Revenue Growth

18% CAGR between
FY22 - FY26

EBIT Growth

27% CAGR between
FY22 - FY26

PAT GROWTH

42% CAGR between
FY22 - FY26

DEBT EQUITY

Net Debt Equity of **0.10x** &
Gross Debt Equity of 0.25x
as on March 31, 2026

With strong financial base, we are confident of setting up new performance benchmarks in the years to come

EXPERIENCED PROMOTERS



Rohit Katyal
Executive Chairman

Holds a bachelors' degree in commerce with specialization in financial accounting and auditing. He brings close to 3 decades of invaluable experience in the field of Civil Construction and Finance.

He currently leads the financial planning, budgeting and compliance function, ensuring adherence to the highest standards of governance and transparency.



Rahul Katyal
MD & CEO

With a deep understanding of the construction industry and experience spanning over 25 years, he brings expertise in project management, budgeting, resource allocation & client relations, enabling the Company to deliver projects with excellence and efficiency.

He leads the Company's strategic planning, emphasizing growth, efficiency and sustainability.



Subir Malhotra
Whole Time Director

He holds a bachelor's degree in civil engineering (honours) from the BITS, Pilani. He has over 30 years of Industry experience.

He leads Business Development and Operations for the Company's Northern India operations, driving growth and efficiency in the region.

Supported by KMP's and SMP's with years with extensive domain experience



Our Creations



OUR CREATIONS



THE PARK - TOWERS 3 & 4
~279 Meters;; 35 lac SQ. FT
Lodha Group, Worli MMR
Tower 3 &4 :- 4 B + GF + 82 Floor



One Altamount
~206 Meters; ~4 lac sq. ft
Lodha Group, MMR
India's Tallest Composite Residential Tower
3B + GF + 43 Floors + Crown



Auris Serenity
~220 Meters; ~22 lac sq. ft
Transcon Developers, Malad
Tower 1&2 (7 P + Eco Deck + 58 F + 3 FCF)

OUR CREATIONS



25 SOUTH PRABHADEVI

~220 Meters;; 25 lac SQ. FT
Hubtown Group, Worli MMR
B+G+9P+40F+4 Sky Villas+ 5RF+ 3SF+ 3FCF



PIRAMAL MAHALAXMI

~266 Meters; ~30 lac sq. ft
Lodha Group, MMR
3 Towers (2B+9P+59/63+1SF)



GARDEN CITY PHASE 3

~28 lac sq. ft
Oberoi Realty
3 Towers (2B+G+4P+66F)

OUR CREATIONS



TEN X HABITAT

~142 Meters;; 42 lac SQ. FT
Raymond Group, Thane MMR
8 Tower (G+42) & 2 Tower (G+53); MLCP
(2B+G+8) ; 2 Premium Tower (2B+G+6P+51)



CANDOR TECHSPACE

~10.5 lac sq. ft
Brookfield, Noida SEZ
3 Towers of 2B+G+ 15



ENIGMA

~30 lac sq. ft
Oberoi Realty
3B+GF+(4P+2A)+62F

OUR CREATIONS



CLUSTER 3 MIXED USED DEVELOPMENT

~143 Meters;; ~9 lac SQ. FT
SBUT, Bhandi Bazar
2 Towers - 25 & 30 Floors



CIDCO

~162 lac sq. ft
Navi Mumbai, MMR
122 towers and 21,346 units



COMMERZ III

~25 lac sq. ft
Oberoi Realty
Commercial- 3B+LG+G+43 Floors
Annex- 2B+G+9 Floors

OUR CREATIONS



World Trade Centre
~29 lac SQ. FT;
Brigade Group/ GIC Singapore
Chennai



IFSCA, GIFT City
~3 lac sq. ft
Gandhinagar, Gujarat



ALTIMUS COMMERCIAL TOWER
~17 lac sq. ft
K Raheja COrp
1B+GF+8P+1A+33 Office Levels+2 SF

OUR CREATIONS



Bhandup Hospital
~7.7 lac Sq. Ft;
MCGM, Bhandup Mumbai
Multispeciality Municipal Hospital



Pt. Madan Mohan Malviya Cancer Hospital
~5.8 lac sq. ft; 352 bed
TATA Trust Cancer Hospital
BHU Campus



Marketcity Mall
~27 lac sq. ft
Phoenix Marketcity, Pune
2 B + 6 Floors + MLCP of 10 Levels



Historical Financials



CONSOLIDATED PROFIT & LOSS

Particulars (₹ In Crs)	FY22	FY23	FY24	FY25	FY26	CAGR
Revenue from Operations	1,340	1,799	1,932	2,350	2,623	18%
Other Income	13	10	32	58	21	
Total Income	1,353	1,808	1,964	2,407	2,644	
Cost of Material Consumed (Incl. Construction Expenses)	931	1213	1294	1621	1852	
Employee Expenses	109	128	124	149	182	
Other Expenses	82	106	182	200	161	
EBITDA (excluding other income)	219	351	331	379	427	18%
EBITDA Margin (%)	16.3%	19.5%	17.2%	16.1%	16.3%	
Depreciation	99	136	101	95	99	
EBIT	133	225	262	342	349	27%
EBIT Margin (%)	9.8%	12.4%	13.3%	14.2%	13.2%	
Finance Cost	67	89	96	93	96	
Share of Profit/(loss) of JV & Associates (net)	-1	0	1	17	6	
Profit before Tax	65	136	167	265	259	
Tax	17	41	47	61	66	
Profit After Tax	48	95	120	204	193	42%
PAT Margin (%)	3.5%	5.3%	6.1%	8.5%	7.3%	
Cash PAT	148	240	229	285	318	
Cash PAT Margin (%)	10.9%	13.3%	11.7%	11.9%	12.0%	

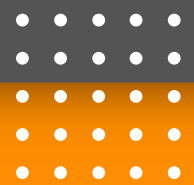
CONSOLIDATED BALANCE SHEET

ASSETS (₹ In Crs)	Mar'26	Mar'25	Mar'24	Mar'23
NON-CURRENT ASSETS	1,144	798	760	886
Property, plant & equipment	640	573	585	648
Capital work-in-progress	32	2	9	20
Intangible assets	3	2	1	1
Right-of-use assets	11	9	3	3
Investments accounted for using the Equity Method	26	20	3	1
Investment	6	2	4	7
Trade receivables	92	60	86	97
Contract assets	245	0		
Other Financial Assets	39	70	24	21
Non Current tax assets (Net)	0	1	1	25
Other Non - current assets	49	59	43	63
CURRENT ASSETS	2,778	2,702	2,389	1,726
Inventories	129	110	111	99
Contract Assets	1,068	1,150	1,229	924
Trade receivables	1,085	1,080	548	348
Cash & Cash Equivalents	91	64	19	29
Bank balances	72	30	190	146
Other Financial Assets	125	81	99	34
Other Current assets	167	122	148	147
Non-current assets held for sale	40	65	45	0
TOTAL ASSETS	3,922	3,500	3,149	2,612

EQUITY & LIABILITIES (₹ In Crs)	Mar'26	Mar'25	Mar'24	Mar'23
EQUITY	1,912	1,720	1,517	1,073
Equity Share capital	85	85	85	68
Other equity	1,824	1,634	1,432	1,006
Non-Controlling Interest	3	1	0	0
NON-CURRENT LIABILITIES	354	326	289	344
Contract Liability	88	75	56	132
Borrowings	129	149	124	112
Lease Liability	7	5	1	2
Other financial liabilities	58	49	44	44
Provisions	1	1	5	2
Deferred tax liabilities (Net)	72	46	60	53
CURRENT LIABILITIES	1,657	1,454	1,343	1,194
Contract Liability	283	170	246	179
Borrowings	343	268	202	258
Lease Liability	4	4	2	2
Trade Payables	910	896	818	634
Other Financial Liabilities	47	33	35	55
Provisions	12	9	6	5
Current Tax Liabilities (net)	21	51	18	9
Other current liabilities	36	24	16	53
TOTAL EQUITY & LIABILITIES	3,922	3,500	3,149	2,612

CONSOLIDATED CASHFLOW

Particulars (₹ In Cr)	FY26	FY 25	FY 24	FY 23	FY 22
PBT	259	265	167	136	65
Adjustments	235	237	267	271	186
Operating profit before working capital changes	494	503	435	407	251
Changes in working capital	(199)	(409)	(467)	(301)	(191)
Cash generated from operations	295	94	(33)	105	60
Direct taxes paid (net of refund)	(71)	(42)	(6)	(17)	(25)
Net Cash from Operating Activities	223	52	(39)	88	34
Net Cash from Investing Activities	(153)	(9)	(152)	(48)	(23)
Net Cash from Financing Activities	(43)	2	182	(34)	1
Net Change in cash and cash equivalents	27	45	(10)	7	12
Opening Cash Balance	64	19	29	22	10
Closing Cash Balance	91	64	19	29	22



THANK YOU



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Mr. Rajesh Das (CFO)

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