

UNIPARTS INDIA LTD.

November 14, 2025

BSE Limited Phiroze Jeejeebhoy Towers Dalal Street, Mumbai – 400 001 Scrip Code: 543689	National Stock Exchange of India Limited Exchange Plaza, C-1, Block G Bandra Kurla Complex Bandra (E), Mumbai – 400 051 Symbol: UNIPARTS
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Subject: Regulation 30: Presentation on Standalone and Consolidated Unaudited Financial Results of the Company for the quarter and half year ended September 30, 2025

Dear Sir/Madam,

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find attached herewith a copy of the Presentation on Standalone and Consolidated Unaudited Financial Results of the Company for the quarter and half year ended September 30, 2025.

The same is also being uploaded on website of the Company at https://www.unipartsgroup.com/home/quarterly_financial_results.

You are requested to take the above on record.

Thanking You,

Yours faithfully,

For Uniparts India Limited

Jatin Mahajan
Head Legal, Company Secretary and Compliance Officer

Encl: As above



Uniparts India Limited

Addressing the core needs of the **WORLD**.
Precision **DELIVERED**, Performance **ASSURED**

*Leveraging engineering competencies and
a global delivery model*

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Content



Q2FY26 Performance



Business Overview



Annexures





Mr. Gurdeep Soni

Promoter, Chairman & Managing Director

The global off-highway market, after a prolonged period of softness, is showing early signs of stabilization – particularly within the construction equipment segment. Uniparts' Q2 performance remained consistent with Q1, delivering a 14% year-on-year growth. This is in line with the guidance we shared in earlier calls and reinforces our confidence in achieving double-digit growth for FY26. Our operations remained stable through the quarter despite the untimely and severe floods in North India – a testament to the resilience and agility of our teams and the robustness of our operational processes. Our dual-shore manufacturing model continues to offer customers flexibility and risk diversification, strengthening our position as a strategic partner. This model has also enabled us to effectively mitigate tariff-related challenges for our customers. As we navigate an evolving global environment, our teams continue to grow stronger, more agile, and better equipped to manage volatility and deliver consistent performance.

Mr. Paramjit Singh Soni

Promoter, Vice Chairman and Executive Director



Operating Environment Update



Construction: Increasing spend on building AI infrastructure is aiding construction industry growth in the North American markets leading to improved end customer demand. In Europe as well, the government spends are encouraging the demand of construction equipment, especially with the focus on developing green power. Uniparts continues to grow ahead of the market – supported by strengthened customer relationships and new business wins in both Europe and North America.

Large Ag: North American large Ag market continues to be soft with the forecast continuing to be of high double digit degrowth. This is largely driven by continued subdued commodity prices, high input costs and still high second-hand inventory. The European Large Ag market is faring better, driven by lowering input prices and with some markets showing an improving momentum of agricultural exports. Uniparts' growth in this segment is supported by new business awards from our European customers.

Small Ag: While still soft, the North American small Ag market is better than the large Ag market, expecting to degrow between 5% to 10% with the compact equipment segment showing momentum. In Europe, the Small Ag demand is showing better outlook than the North American markets. In India, the good monsoon, high tractor utilisation and the recent GST rate cuts are expected to generate about 4% - 7% growth in tractor volumes for FY26. With a strong domestic footprint and growing export linkages, Uniparts is well positioned to capture mid-teen growth in this segment.

Aftermarket: This segment continues to be an important business driver for Uniparts and we expect to grow in single digits in this segment YoY.



Key Takeaways from Q2FY26

Total Revenue

Rs 2,827 Mn

14.6% (YoY)



EBITDA

Rs 640 Mn

52.6% (YoY)



PBT

Rs 505 Mn

83.3% (YoY)

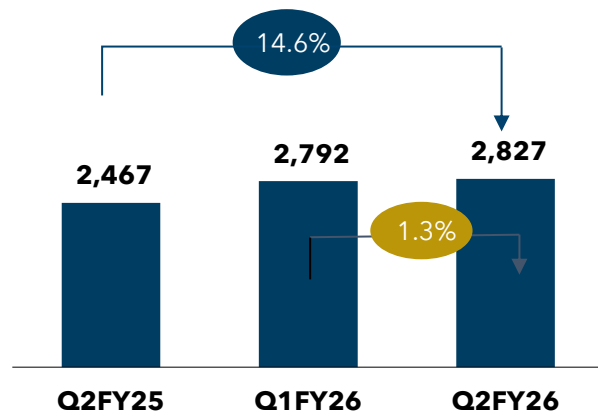


PAT

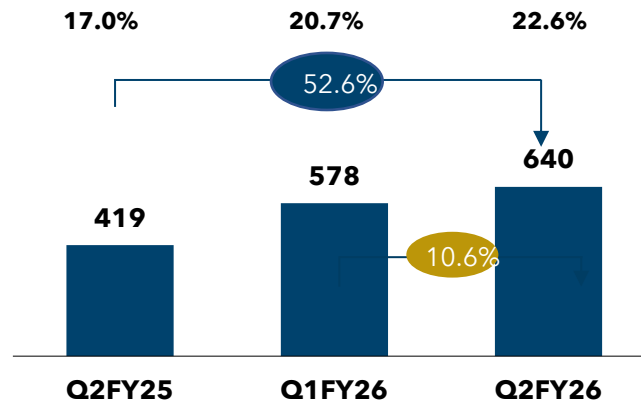
Rs 394 Mn

86.3% (YoY)

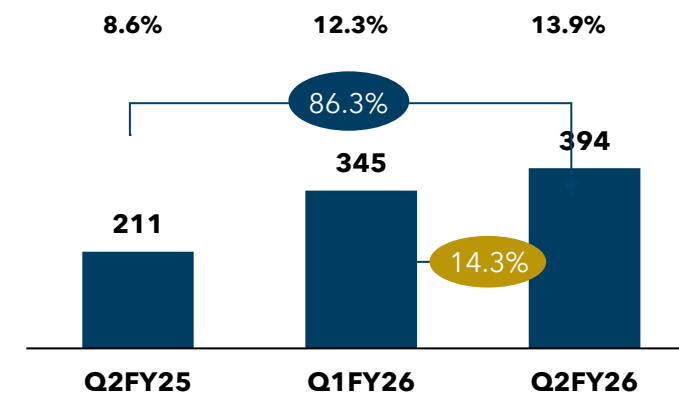
Total Revenue



EBITDA & Margins (%)



PAT & Margins (%)



Note: Total Revenue, EBITDA, PBT and PAT include other income



Key Takeaways from H1FY26

Total Revenue

Rs 5619 Mn

9.7% (YoY)



EBITDA

Rs 1,218 Mn

38.5% (YoY)



PBT

Rs 952 Mn

56.5% (YoY)

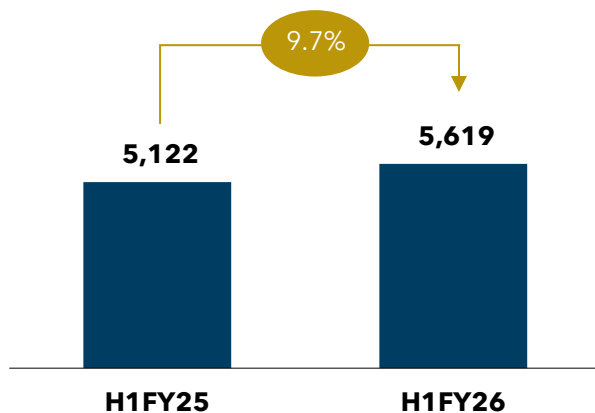


PAT

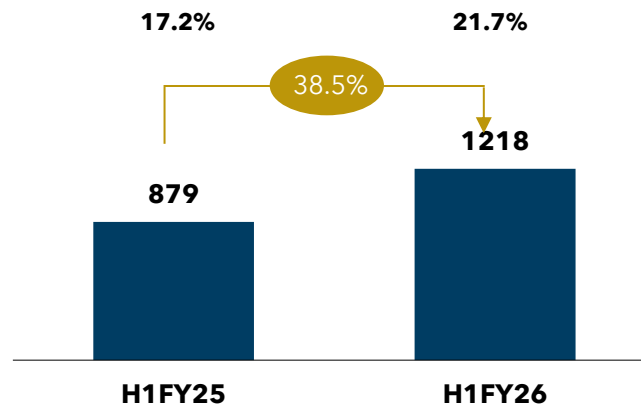
Rs 739 Mn

60.4% (YoY)

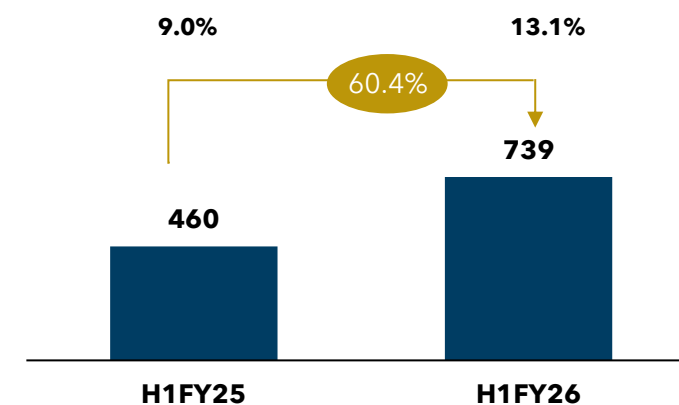
Total Revenue



EBITDA & Margins (%)



PAT & Margins (%)

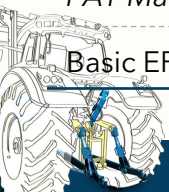


Note: Total Revenue, EBITDA, PBT and PAT include other income



Q2FY26 Results (Consolidated)

Figures in INR Mn	Q2FY26	Q1FY26	Q2FY25	QoQ Change	YoY Change
Revenue from Operations	2768	2737	2414	1.2%	14.7%
Other Income	59	55	53		
Cost of materials consumed (including change in inventory)	846	941	907		
Gross Profit Margin (As % of Revenue from Ops)	69.4%	65.6%	62.4%		
EBITDA	640	578	419	10.6%	52.6%
EBITDA Margin(%)	22.6%	20.7%	17.0%		
Operating EBITDA (EBITDA - Other Income)	581	523	366	11.0%	58.7%
Operating EBITDA Margin(%) (As % of Revenue from Ops)	21.0%	19.1%	15.2%		
Depreciation & Amortization Expense	111	111	120		
EBIT	529	467	299	13.2%	76.9%
EBIT Margin(%)	18.7%	16.7%	12.1%		
Finance Cost	24	20	23		
PBT	505	447	276	13.0%	83.3%
Tax Expense	111	102	65		
PAT	394	345	211	14.3%	86.3%
PAT Margin(%)	13.9%	12.3%	8.6%		
Basic EPS (Rs.)	8.7	7.6	4.7		



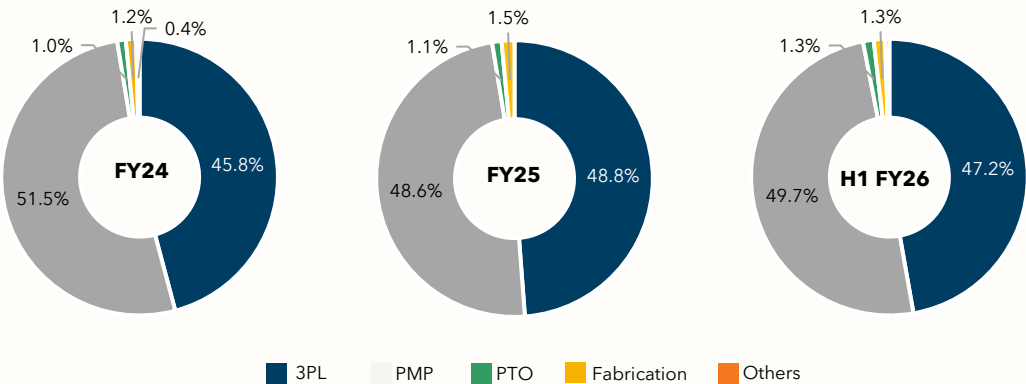
Revenue Distribution

Leading Presence in the Manufacture of 3PL and PMP Products Globally

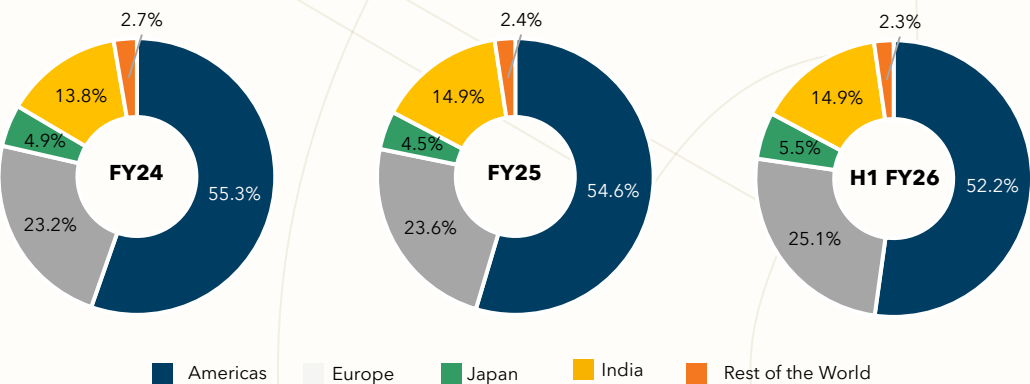
Healthy Revenue Mix

INR Mn, Segment revenue as % of finished goods sales

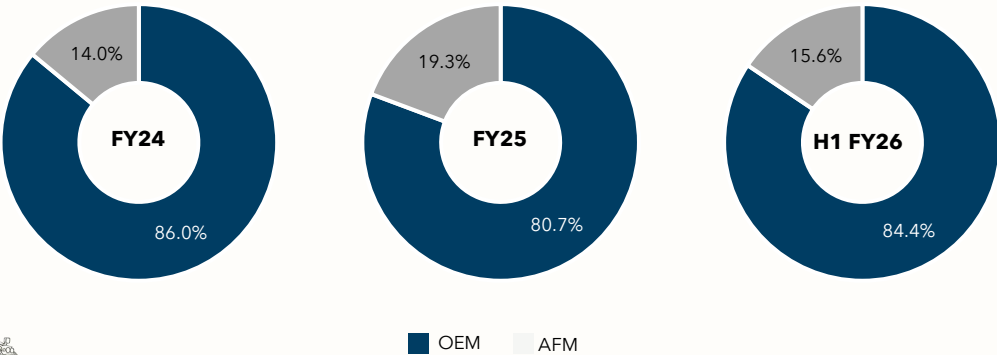
Product Vertical



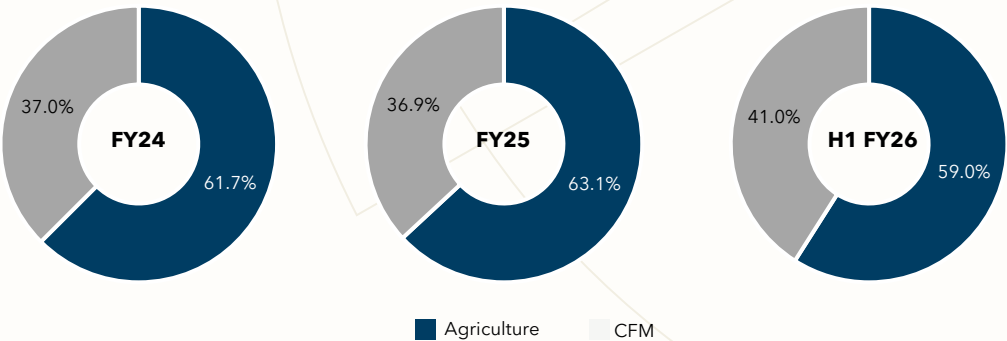
Geographical Presence



Market Presence



Segmental Presence



Content



Q2FY26 Performance



Business Overview



Annexures



Product Categories



Three Point Linkage



Precision Machine Parts



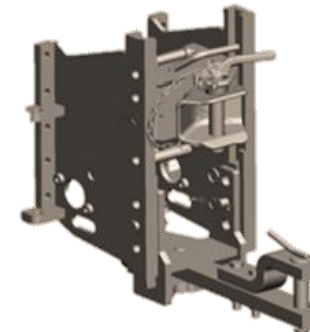
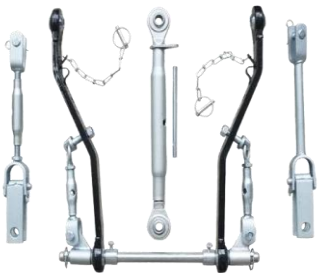
Power Take Off



Fabrication



Hydraulic Cylinders



Note: We do small and medium scale Fabrication, PTO (Power Take-off) and Hydraulic components

Leading Global Supplier of Critical Components Solutions

3 Point Linkage - Revenue Contribution*: 47%

- Tractor specific designed and validated system.
- Allows for quick and easy attachment and detachment of implements.
- Allows for the balanced operation of the implement, improves efficiency, and reduces operator fatigue.



Market leaders in small tractor (<70 HP) linkage system globally.

Precision Machined Parts - Revenue Contribution*: 50%

- High-quality and reliable components for use in construction machinery, equipment, and structures.
- These parts are made to tight tolerances and durability to withstand the tough operating environment of OHVs.



Leading global supplier in fragmented market with manufacturing base in India and US and servicing all major geographies (Americas, Europe, Japan, India, ROW).

Precision Manufacturing

Higher Complexities

High No. of SKUs

Healthy Margins

**\$1
billion+**
Market Size



**Customers
served**
Customers
served



25+
Countries
covered in sales

*Revenue contribution is based on H1FY26 finished goods sales

Additional Synergistic Offerings to Extend System Boundaries

Power Take Off (PTO)



Description

Device used to drive implements such as rotary tillers, mowers and other equipment requiring a mechanical drive by the tractor.

Key Highlights

Focused on producing PTO for the agriculture sector which allows the transfer of power from the tractor to the implement.

Features

International safety norm compliance

Hydraulic Cylinders



Used as actuators to move mechanized components, by generating linear motion along an axis.

Synergies with existing activities in the 3PL application and hydraulic lift of tractors. Significant demand in international markets, due to increased mechanization.

High cleanliness norm specifications.

Fabrication



Large structural parts and chassis such as hitch frames, A-frames, front-end loader parts, grain lifters and engine frames.

Synergetic to products and vehicles currently serviced

- Provides superior finish
- Varied size designs

Deepen wallet share

Extended offerings in adjacent areas on the same OHVs for existing customers by offering integrated system solutions

Large Addressable Market

Estimated Market Size of ~\$10 billion; Establish new customer base by addressing growing markets of UTVs etc.

More Value Per Vehicle

Leveraging manufacturing expertise to diversify the product portfolio and move up the value chain

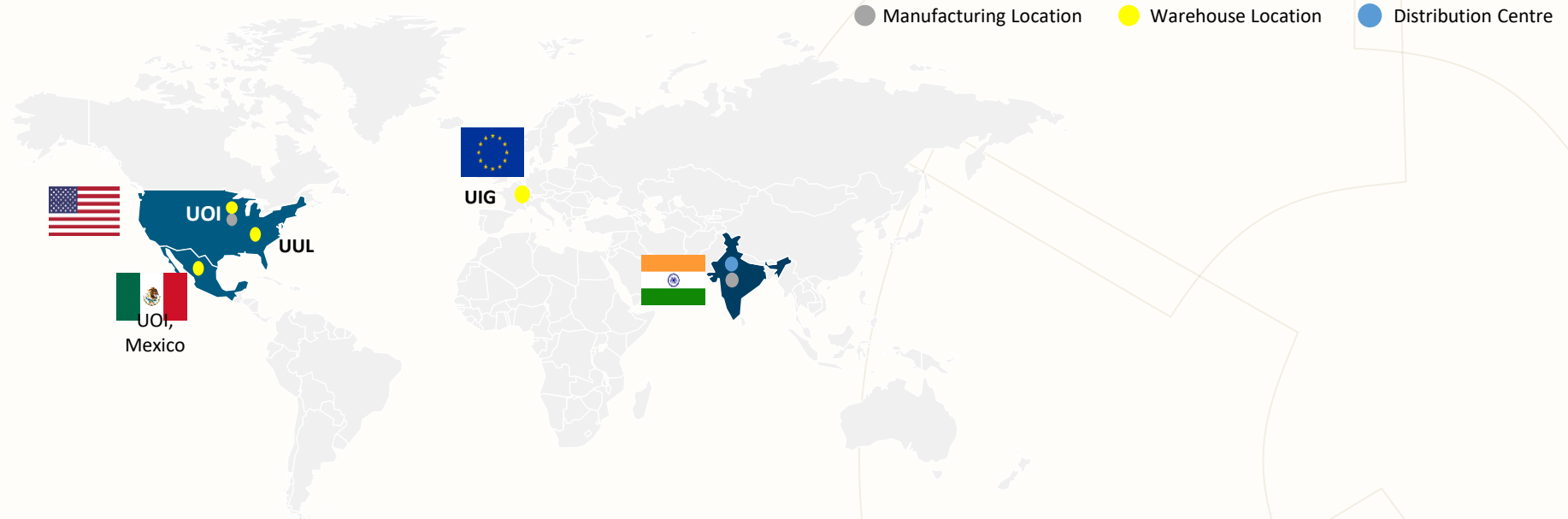
Healthy Margin Profile

Long term margin guidance remains at 20%



Warehouse and Manufacturing Facilities

Dual Shore Manufacturing & Warehousing Solutions



7 Manufacturing Facilities

6 in India; 3 in Ludhiana;
2 in Noida
1 in Visakhapatnam; 1 in US

4 Warehouses

2 in US; 1 in Europe;
1 in Mexico

67,320

Metric tonne per annum
Aggregate installed capacity*

400 kilonewton

Test rig capability

Delivery options

Tailored to customer specifications

1 Distribution Facility in India

Facilities in Close Proximity to Customers Ensuring



Cost effectiveness



Quicker delivery



Faster turnaround time

Global Delivery Model De-Risks Clients' Supply Chain

Dual Shore Delivery Model

	Local Delivery	Direct Export	Warehouse Sales
Model specification	<ul style="list-style-type: none"> Manufactured and delivered in same geography 	<ul style="list-style-type: none"> Manufactured in India for export around the world 	<ul style="list-style-type: none"> Products stocked in warehouse for offtake
Model features	<ul style="list-style-type: none"> Shorter lead times Flexible batch sizes 	<ul style="list-style-type: none"> Competitive pricing Longer lead times Longer inventory cycle 	<ul style="list-style-type: none"> Just in Time delivery from local warehouse Customized packing and lot sizes Lower inventory cycle for customers



Servicing all **10 leading Global OHV OEMs** in Agriculture and half of the leading **10 players** in the **CFM Segment***.



UIL has market leadership in supplying key systems and components like 3PL and PMP for OHVs globally : Complex, critical, and low volume high SKUs products.



Preferred component supplier for manufacturer of **<70 HP Tractors**.

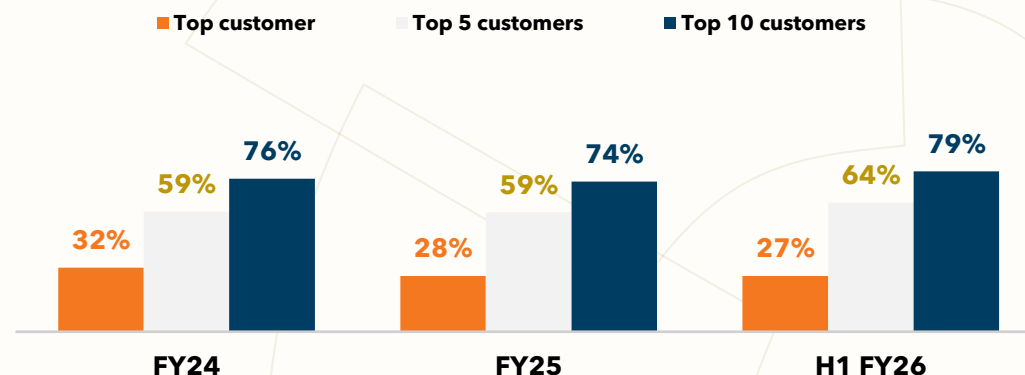


Involved from the design stage for new products and launches providing **end-to-end solutions**.

**CFM global players outside China*

Four of the Top Five Customers have been Associated with Uniparts for over 10 years

Trend of Customers Contribution to Sales



Superior Customer Service

Warehousing Sales : Pre-sales services and customized delivery.

Multiple Delivery Options

- Global delivery model encompassing local deliveries, Direct exports and warehouse sales.
- Delivery facilitated as per customer requirements.

Dual Shore Manufacturing

- Fully integrated engineering solutions provider
- Manufacturing facilities in India and US
- Efficiently utilised capacities and modular additions

Future Growth Drivers



New Product Platform
in Large Tractors
(High HP)



Expand into Large
Construction Equipment



Grow inorganically through
strategic acquisitions and
alliances.

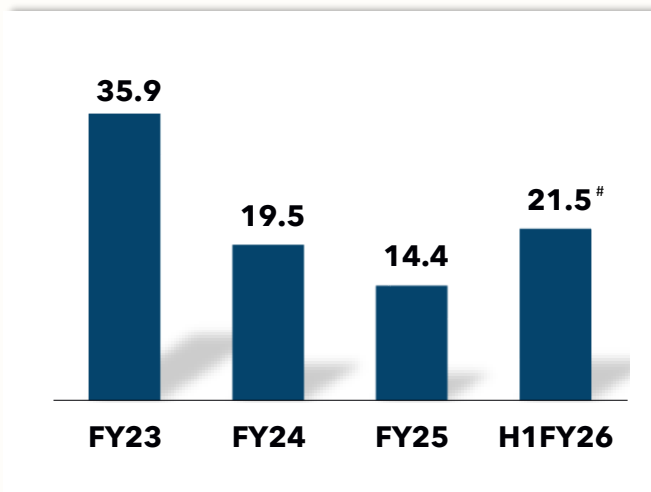


Expand geographically
in Japan, Korea and
other Asia Pacific
nations

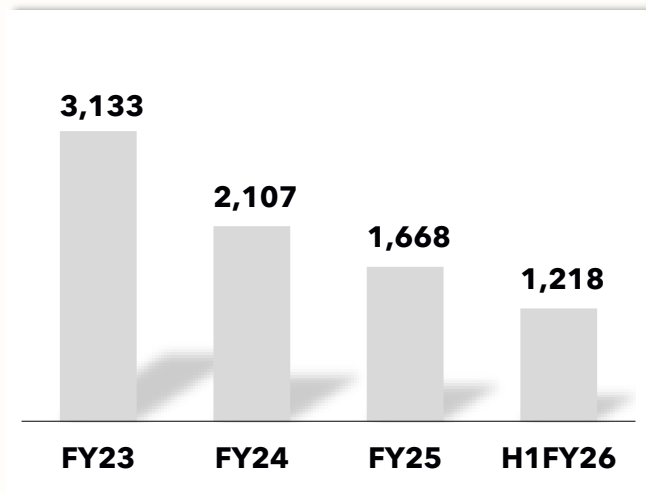


Key Financial Metrics - Historical

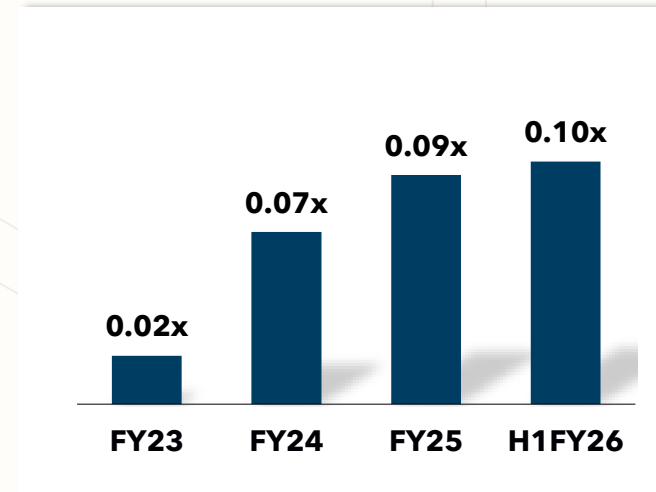
RoCE (%)



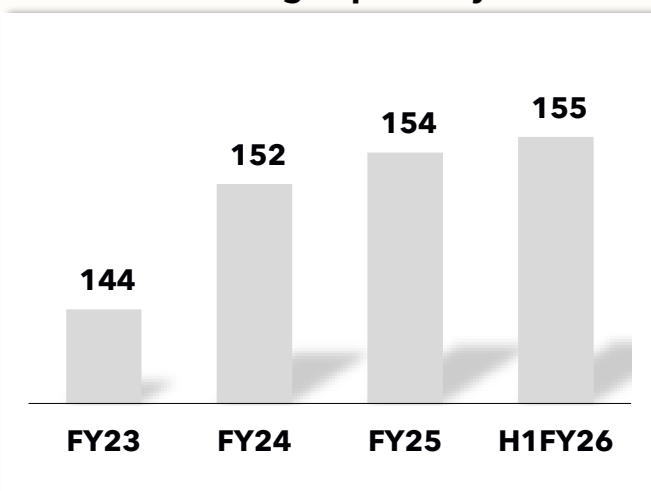
Reported EBITDA (Rs Mn)



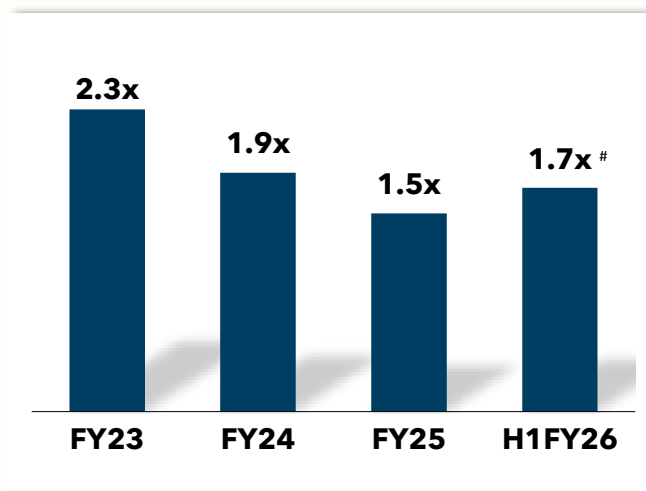
Debt / Equity



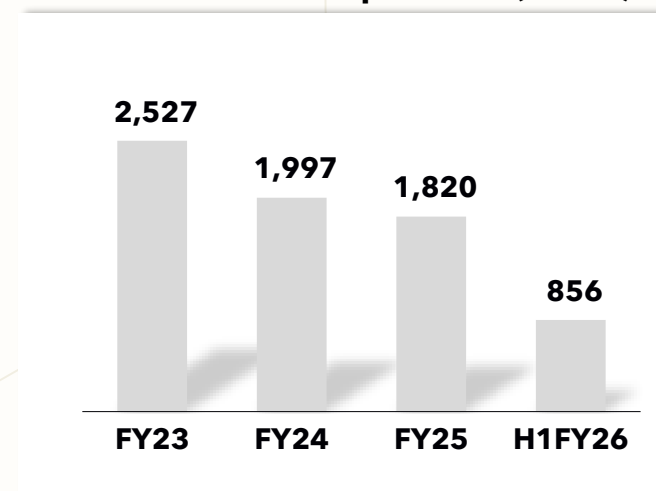
***Working Capital Days**



****Fixed Assets Turnover**



Cash Flow from Operations (Rs Mn)



*Working Capital Days = (Inventory + Receivables – Payables) / Revenue from Ops *365. ; **Fixed Assets Turnover = Revenue from operation/Gross block (Including right to use assets) ; # Annualized



Organisational Strengths



Senior Leadership Team with vast experience and expertise in OHV Industry.



Senior Leadership Team located across key geographies and time zones (US, Europe, India).



250+ Engineers / Technical Diploma holders.



50+ strong Business Development and Sales / Customer Service organization.



~45% staff members working with Uniparts Group for 10+ years.



Historical Profit and Loss

Figures in INR Mn	FY23	FY24	FY25	H1FY26
Revenue from operations	13,660	11,395	9,637	5,505
Other income	162	93	212	114
Total income	13,822	11,489	9,849	5,619
Cost of materials consumed	4,966	3,966	3,118	1,944
Changes in inventories of finished goods, work-in-progress, stock-in-trade and scrap	(91)	264	431	(157)
Gross Profit	8,947	7,260	6,300	3,832
Gross Profit Margin (%)	65%	63%	64%	68%
Employee benefits expense	2,396	2,457	2,296	1,256
Other expenses	3,418	2,694	2,336	1,358
Total expenses	5,814	5,151	4,632	2,614
EBITDA	3133	2,107	1,668	1,218
EBITDA Margin (%)	23%	18%	17%	22%
Depreciation and amortization expenses	390	417	442	221
EBIT	2,743	1,690	1,226	997
EBIT Margin (%)	20%	15%	12%	18%
Finance costs	60	57	83	45
PBT	2,683	1,633	1,143	952
PBT Margin (%)	19%	14%	12%	17%
Total tax expenses	633	387	263	213
PAT	2049	1,247	880	739
PAT Margin (%)	15%	11%	9%	13%
Other comprehensive income / (loss) for the period / year, net of tax	(111)	(5)	(52)	(60)
Total Comprehensive Income	1,938	1,241	828	679
EPS attributable to owners of parent				
Basic EPS (in Rs.)	46.3	28.1	19.5	16.4
Diluted EPS (in Rs.)	45.4	27.6	19.5	16.4



Historical Balance Sheet

Figures in INR Mn	FY23	FY24	FY25	H1FY26
Assets				
Non - Current Assets				
Property, plant and equipment	2,037	2,001	2,010	1,946
Right of use assets	656	616	561	510
Capital work-in-progress	71	128	96	143
Goodwill	660	664	669	679
Other intangible assets	16	18	11	31
Intangible assets under development	1	-	24	5
Other financial assets	62	64	89	89
Current tax assets (Net)	59	75	92	73
Other non-current assets	33	21	4	9
Total non - current assets	3,595	3,587	3,556	3,485
Current Assets				
Inventories	4,530	4,244	3,858	4,097
Investments	250	1,563	2,431	2,831
Trade receivables	1,553	1,335	1,126	1,358
Cash and cash equivalents	387	189	329	295
Other balances with banks	0	2	2	1
Other financial assets	33	48	6	3
Other current assets	221	320	388	386
Total current assets	6,978	7,700	8,140	8,971
Total Assets	10,573	11,287	11,696	12,456

Figures in INR Mn	FY23	FY24	FY25	H1FY26
Equity and Liabilities				
Equity				
Equity share capital	446	451	451	451
Other equity	7,860	8,227	8,421	8,732
Total equity	8,306	8,678	8,872	9,183
Liabilities				
Non - Current Liabilities				
Borrowings	94	22	12	9
Lease liabilities	360	318	252	231
Provisions	164	159	162	180
Deferred tax liabilities (Net)	229	226	225	214
Other non-current liabilities	11	10	10	11
Total non - current liabilities	858	735	661	645
Current Liabilities				
Borrowings	81	597	826	883
Lease liabilities	76	89	109	83
Trade payables due to:				
Micro and small enterprises	290	134	169	227
Other than micro and small enterprises	415	708	742	943
Other liabilities	392	268	267	422
Provisions	63	67	50	56
Current tax payable	93	10	0	14
Total current liabilities	1,411	1,873	2,163	2,628
Total liabilities	2,267	2,609	2,824	3,273
Total Equity and Liabilities	10,573	11,287	11,696	12,456



Content



Q2FY26 Performance



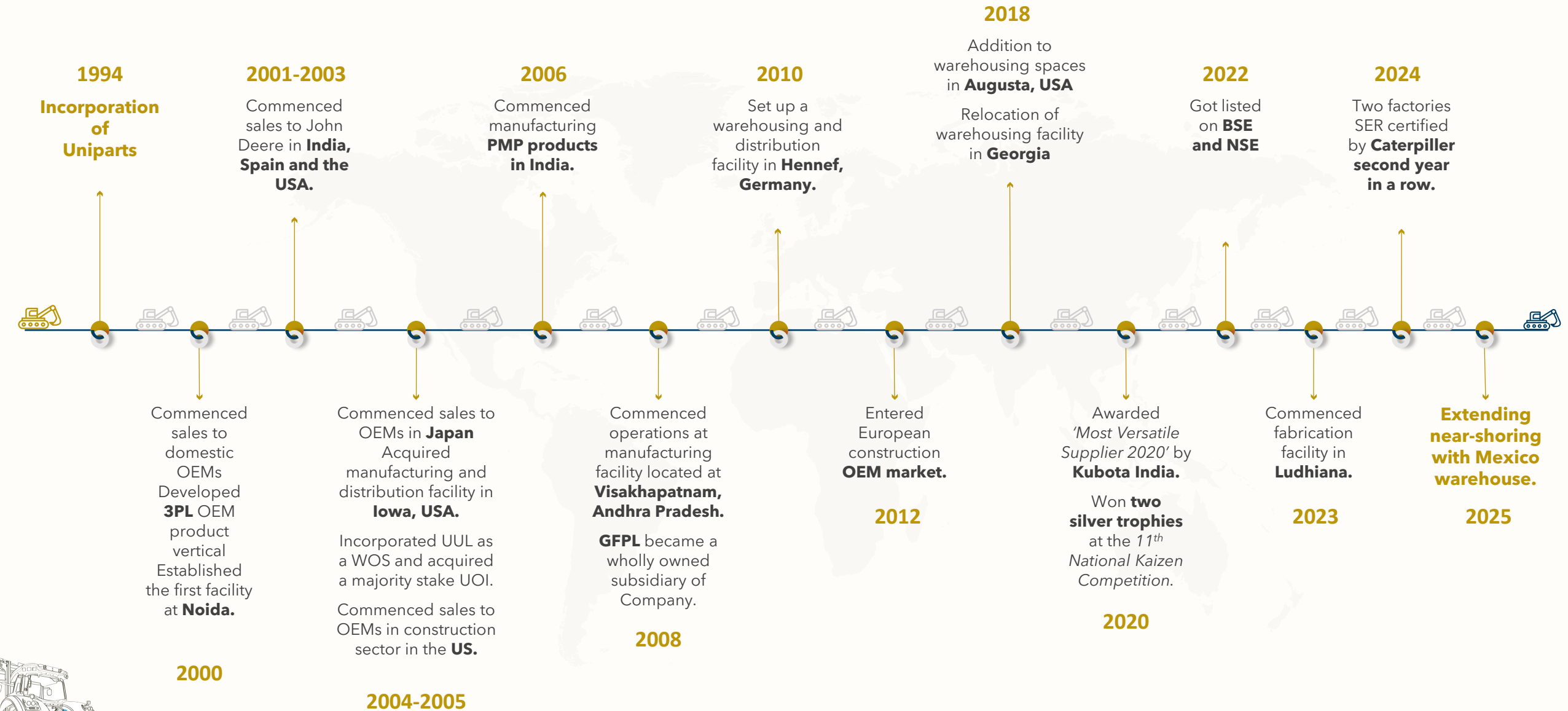
Business Overview



Annexures



Key Milestones





Uniparts India Ltd. (UIL)

100%



**Gripwel Fasteners Pvt. Ltd.
(GFPL)**



**Gripwel Conag Pvt. Ltd.
(GCPL)**



**Uniparts India GmbH
(UIG)**



**Uniparts USA Ltd.
(UUL)**

100%

**Uniparts Olsen Inc
(UOI)**



Leadership Team and Board



Mr. Gurdeep Soni
Promoter, Chairman &
Managing Director

Location: India

Masters' degree in Management Studies from BITS Pilani. 4 decades of experience in the Industry. In charge of the aftermarket business.



Mr. Paramjit Singh Soni
Promoter, Executive Director
and Vice Chairman

Location: USA

Bachelor's degree in Commerce from University of Delhi. Over **4 decades** of experience in the industry. In charge of OEM business, business growth and diversification plans of the Company.



Mr. Herbert Coenen
Non-Executive
Director

Location: Germany

Diploma in Mechanical Engineering from the University of Applied Science, Cologne. Over **3 decades** experience in global OHV market. In charge of business development, expansion and technology.

Independent Director

Mr. Ajaya Chand

Ms. Celine George

**Mr. Parmeet Singh
Kalra**

**Mr. Sanjeev Kumar
Chanana**



Ms. Tanushree Bagrodia
Wholtime Director &
Group COO

Location: India

Bachelors' degree in Computer Engg and MBA from INSEAD. Over **2 decades** of extensive experience across diverse geographies and sectors, spanning financial services, automotive, and start-ups. In charge of Company's group wide operations and customer service.



Mr. Rohit Maheshwari
Group Chief Financial
Officer

Location: India

A qualified Chartered Accountant. Over **27 years** of experience in managing Finance, Accounts, Fund Raising, Taxation and M&A. In charge of Financial Planning, Accounting, Fund raising and Strategic projects.



Thank You

**For further information,
please get in touch with:**

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Go India Advisors

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Sheetal Khanduja
sheetal@GoIndiaadvisors.com



Passion

Innovation

Integrity

Excellence

Team Work