

**Wanbury Limited**

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February 9, 2026

To BSE Limited PJ. Towers, Dalal Street Mumbai - 400 001. Script Code: 524212	To National Stock Exchange of India Ltd, Exchange Plaza, Bandra Kurla Complex, Bandra (East), Mumbai – 400 051. Script Code: WANBURY
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Dear Sir/Madam,

Sub.: Disclosure under Regulation 30 of the SEBI LODR, 2015 – Investors Presentation on Q3 & nine months ended 31.12.2025

As per Regulation 30 of SEBI LODR, 2015, please find attached herewith copy of Investors Presentation on Un-audited Financial Results (UFR) for the quarter and nine months ended 31st December 2025 and is also available on the website of the Company at www.wanbury.com

This is for your information and record.

Thanking you.

Yours faithfully,
For Wanbury Limited



Jitendra J. Gandhi
Company Secretary

Encl: a/a.



WANBURY
Towards Better Healthcare

Towards Better Healthcare

Earnings Presentation

Q3 & 9MFY26 | February 2026

Wanbury Limited

NSE: WANBURY | BSE: 524212

Bloomberg: WANB:IN



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Business Profile



API Business

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Company Profile



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Executive Summary

Successful turnaround to growth momentum

Operational & financial turnaround over last 2 years, now transforming into growth momentum



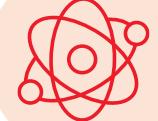
Global market leaderships in key products

Globally significant market share in Metformin & Sertraline



Building new growth drivers in API business

Through launch of an Anaesthetic in Q4, and pipeline of 4 molecules commercialisation each year beginning next financial year



De-risked & robust balance sheet

Refinanced debt & healthy internal accruals i.e. moderate leverage ratio of ~2X Debt/EBITDA



Established global regulatory approvals



Levers for operating leverage & margin expansion

Through brownfield expansion, operational scale-up, and borrowing cost optimisation



Formulation growth story

Turnaround, envisaged break-even (in FY26), to rebuilding & scale-up (in FY27)



Corporate Journey

1990-2000

Foundation & Early Strategic Acquisitions



1990

Incorporated as Pearl Organics Pvt. Ltd.

1992

Established 1st plant for manufacturing APIs

1995

Acquired Brij Chemicals' plant at Patalganga (Maharashtra)

1995

Acquired Wander Limited → a subsidiary of Sandoz (Brand Formulation Business)

1996

Formed a strategic alliance with Wyckoff Chemicals (US) to market APIs in US

2000-2010

Corporate Consolidation & Venture into Developed Markets



2002

USFDA approval received for Patalganga plant

2004

Wander Limited merged with Pearl Organics Limited → Renamed Wanbury Limited

2006

Acquired Doctor's Organic and Chemicals Limited (DOCL) with a multi-purpose USFDA-approved facility in Tanuku

2007

- DOCL merged with Wanbury Limited
- Listing on NSE & BSE
- Acquired Cantabria Pharma S.L. (Spain) - Present in ethical branded formulations in European market

2010-2023

Challenges & Business Turnaround

2024-Onwards

Transformation & Growth



Underwent Corporate Debt Restructuring with Banks

2020

Deleveraged through strategic sale of brands to Cipla worth ₹87 crore

2021

Capital infusion of ₹50 crore through Preferential Issue

2023

- Raised ₹95 crore via NCD from Neo AIF
- Settlement with all the lenders

2024

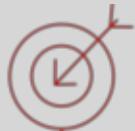
Scale up EBITDA to ₹73 crore

2025

- Modernised the facilities with an investment of ₹48 crore
- 6th successful USFDA inspection for Patalganga plant (zero 483 observations)
- Successful ANVISA audit clearance for Tanuku plant
- Refinanced Neo AIF Debt at lower interest rate
- Achieved highest-ever Operational EBITDA of ₹80 crore

Successful Business Turnaround

Financial Turnaround



Debt reduction: **~75% reduction from peak-debt obligation of ~700 Crores**, including corporate guarantee from Wanbury Limited to Wanbury Holding B.V. (Netherlands) for foreign debt held by Netherlands subsidiary

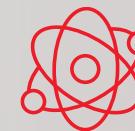


Debt refinancing: **Reduction in borrowing cost from 22.5% to 12.5% with effect from 1st March 2025**, with scope for further reduction in coming years



Exited all high cost private financial agreements

Operational Turnaround



Capacity ramp-up in key existing API products through de-bottlenecking:
Metformin (25% increase in last 3 years) & Sertraline (20% increase in last 3 years)



Operational profitability: ~3X EBITDA scale-up between FY23-FY25, through de-bottlenecking projects & production scale-up, efficient procurement practises, technical savings, among others



Envisaged break-even profitability in Formulations business, delivered financial break-even in 9MFY26

Wanbury at a Glance



**6 products,
100% chronic
portfolio**

API Portfolio



**10+ brands,
acute &
semi-chronic**

Formulations Portfolio



**2 USFDA
approved API
facilities**

with 386 KL cumulative
reactor capacity



80%+

Export top line, with
emphasis on developed
markets



1,200+

Employee strength



37+ years

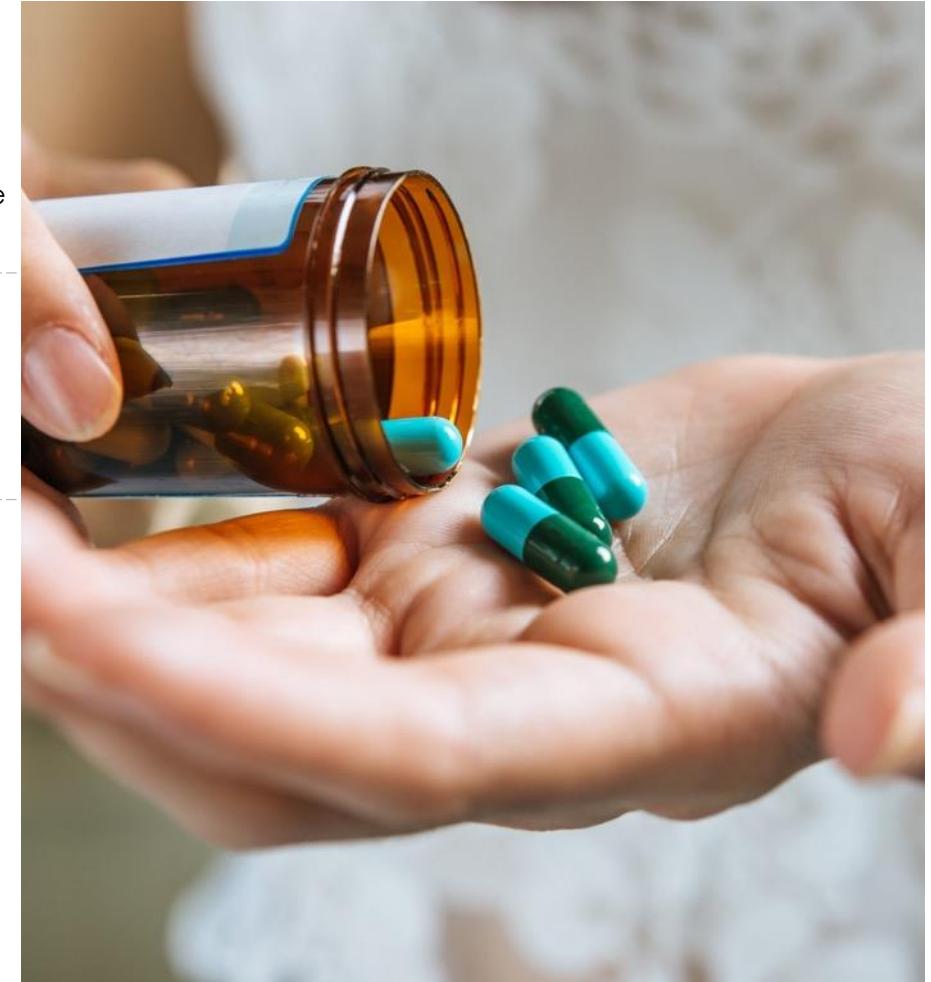
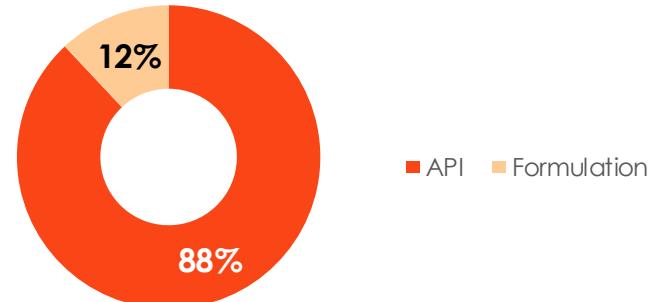
Operating history



**Regulatory
Approvals**



Dual revenue-stream



Business Streams

API

API manufacturer building a niche, profitable & sustainable business (50%+ Gross contribution margins)

Diversified business stream across 6 products + additional launches in pipeline

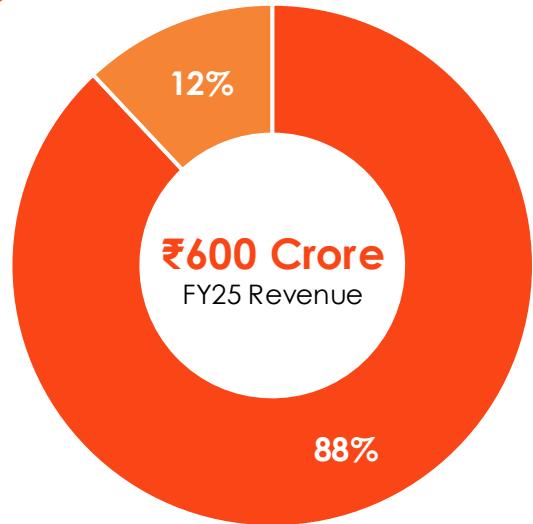
Regulatory markets focused (EU, Brazil, US) mature & sustainable API business

₹530 Crore+

FY25 Revenue

₹424 Crore+

9MFY26 Revenue



API

Formulations

Formulations

Rebuilding legacy brand formulations business in India

10+ active brands + additional launches in pipeline

Key therapeutic categories such as Anti cold & cough, Anti-infective, Anti-inflammatory, Supplements, Orthopaedic, among others

₹70 Crore+

FY25 Revenue

₹62 Crore+

9MFY26 Revenue



Board of Directors



Mr. Mohan Kumar Rayana

Promoter & Whole Time Director

25+ years of experience

He holds a Bachelor of Pharmacy from the University of Mumbai and brings over 30 years of diverse experience in the pharmaceutical industry. He has led the company's growth since inception, overseeing strategic acquisitions and operational expansion.



Mr. K. Chandran

Whole Time Director

30+ years of experience

He graduated with a Bachelor of Science from the University of Mumbai and has over 28 years of pharmaceutical sector experience. Mr. Chandran has played a key role in the company's strategic direction and has been associated with Wanbury for more than 25 years.



Dr. Anupama Vaidya

Non Executive Independent Woman Director

30+ years of experience

She holds a Bachelor's degree in Computer Science from the University of Pune as well as an MBA specializing in Human Resource Development from Symbiosis Institute of Business Management, Pune. She brings a strong background in technology and HR development to the board.



Mr. Mridul Mehta

Non Executive Independent Director

30+ years of experience

He holds a BE in Computer Science from Maharaja Sayajirao University Baroda and an MBA in Finance from the Indian Institute of Management (IIM), Bangalore. With more than 30 years of professional experience, Mr. Mehta specializes in business strategy, management consulting, investment banking, and finance.



Mr. Manoj Gursahani

Non Executive Independent Director

35+ years of experience

He serves as the Executive Director of the Mumbai-Global Chamber and is Co-Founder of Vera Healthcare Technologies, an AI-driven platform for early screening and detection of Diabetic Retinopathy, Glaucoma, and Age-Related Macular Degeneration. He brings significant leadership experience from the healthcare and technology sectors.



Mr. Pallavur Sankar Das

Non Executive Independent Director

35+ years of experience

He is an accomplished leader with more than 35 years of experience in the pharmaceutical industry. He has built and scaled businesses across India and other emerging markets. From 2014 to 2022, he was CEO and Director of Curatio Healthcare Private Limited, a domestic dermatology and cosmetic pharmaceutical company.

R&D Capabilities



API R&D Center



Location
Tanuku, Andhra Pradesh



DSIR and FDA (India)
Recognized

R&D Competencies

- New API development
- Cost optimization for existing molecules
- Troubleshooting plant problems
- Analytical development
- Process optimization
- Backward integration development

Immediate Focus Areas:

- Sertraline backward integration
- Metformin yield improvement
- New molecule commercialization's (4 annually)
- Patented molecules process development (post-FY29 focus area)



Formulations R&D Center



Location
Navi Mumbai, Maharashtra



DSIR and FDA (India)
Recognized

R&D Competencies

- Cost optimizations
- New product development
- Process technology development
- Development of Novel Platforms for Speciality Generics and Intellectual Property Rights (IPR)

R&D Capabilities



Process Optimization:
Optimization of synthesis routes for enhanced yields & lowering costs



Impurity Control:
Advanced analytical techniques aligned with ICH guidelines



Analytical Excellence:
DSIR-approved R&D facility with validated methods



Green Chemistry:
Integration of sustainable solvents, catalysis, and waste reduction efforts



Scale-Up Capability:
Lab to commercial with FTE team, integrated QC lab

Environment, Health & Safety

EHS at Wanbury

- **Best-in-class standards:** Committed to global EHS norms and strict regulatory compliance across all operations
- **Environmental focus:** Zero liquid discharge (ZLD) plants, advanced Effluent Treatment Plants (ETP), and continual investment in energy efficiency
- **Sustainable energy:** Upcoming 1.5 MW solar energy project at Satara, to meet 70% of Patalganga site's energy requirements captively through renewable energy

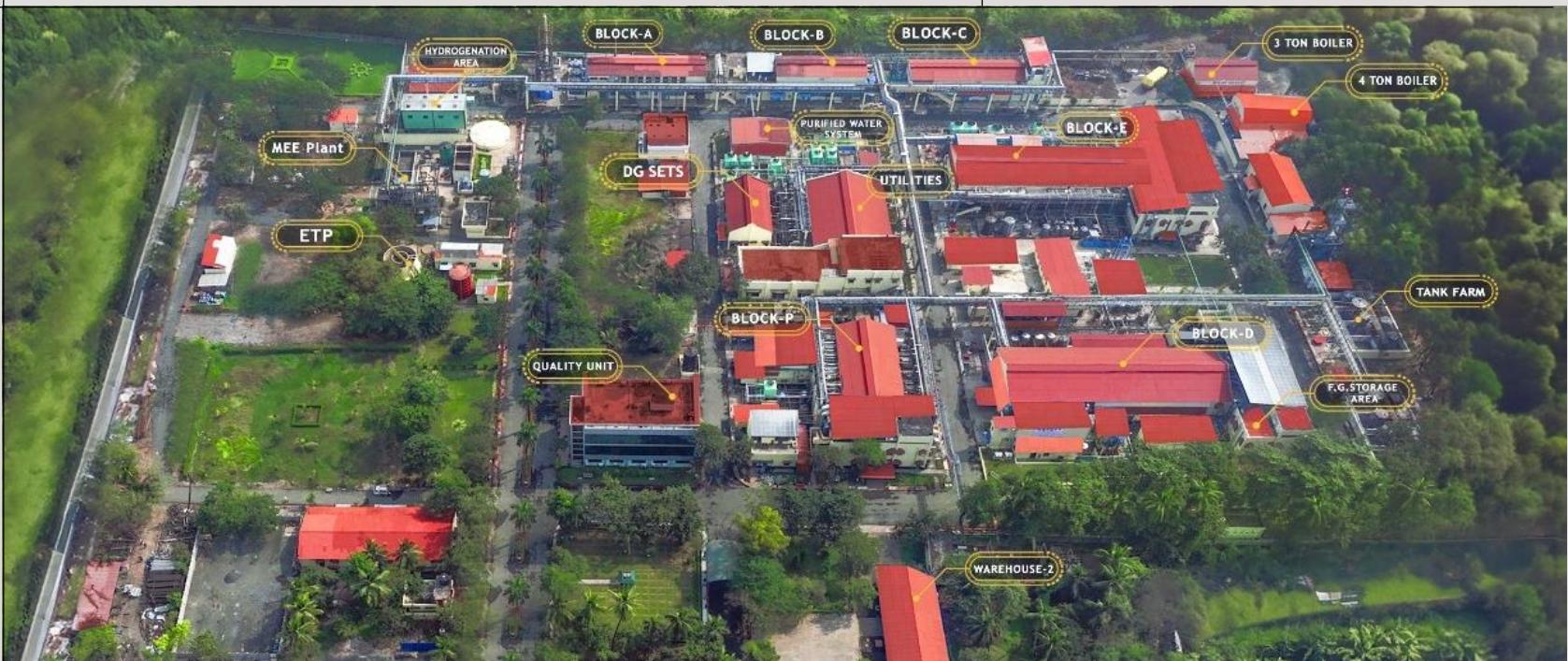
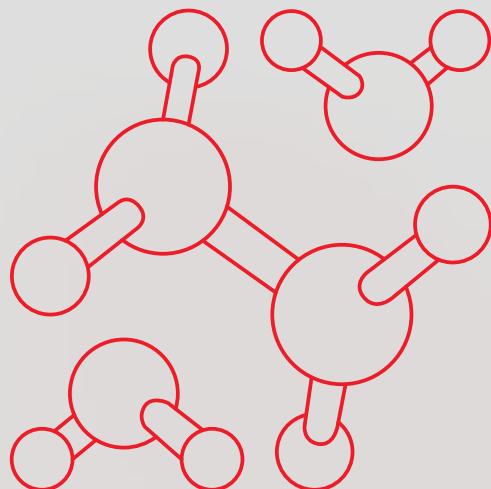


- **Safety culture:** Comprehensive training, systematic risk assessments (HAZOP), and robust emergency response systems at all sites
- **Community & workforce:** Prioritizing safety, public health, and sustainability for employees and local communities



02

Business Profile: API



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API: Strategically Curated Product Portfolio

Significant global market share in Top 3 products

Molecule	Therapeutic Category	Global Market (MT)	Estimated Market Share
Metformin	Antidiabetic	~75,000	~11%
Sertraline	Antidepressant	~680	~30%
Tramadol	Pain Management	~550	~11%

Existing portfolio – 6 molecules

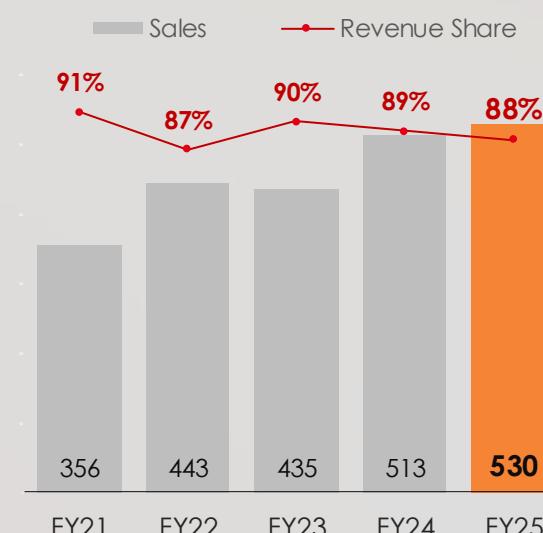
- Metformin - Antidiabetic
- Sertraline - Antidepressant
- Tramadol - Pain Management
- Paroxetine - Antidepressant
- Mefenamic acid - Anti-inflammatory
- Diphenhydramine - Antihistamine

Recent portfolio addition – 1 molecule

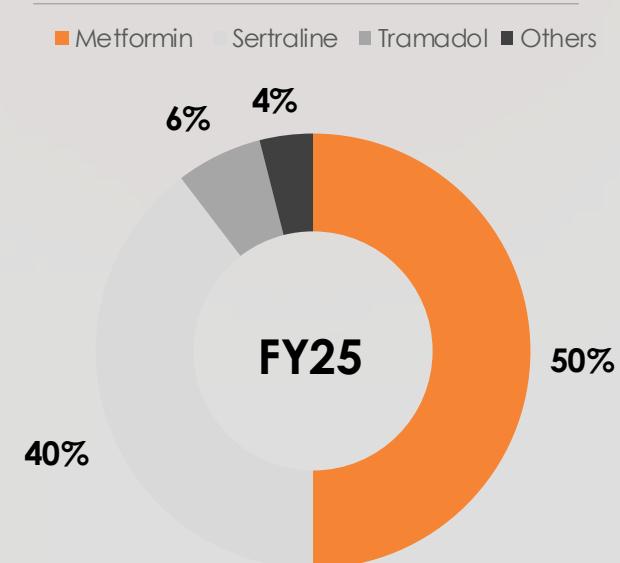
- An Anaesthetic - Commercialised in Q4FY26
- 4 new additions each year beginning FY27

Note - Market Size, Market Share data as per Clarivate & Company Estimates

API - Revenue & Share



API Sales Breakdown



API: World-Class Manufacturing Infrastructure



Site 1: Tanuku, Andhra Pradesh



Site 2: Patalganga, Maharashtra

	400 KL Reactor Capacity
	~70% Revenue Contribution
	450+ Headcount
	18 Acres Land Bank

Multi-Purpose Plant

Metformin, Sertraline, Tramadol, Paroxetine, Mefenamic Acid, Diphenhydramine, (upcoming anaesthetic)

Potential for future brownfield CAPEX

	96 KL Reactor Capacity
	~30% Revenue Contribution
	250+ Headcount
	2.3 Acres Land Bank

Dedicated Plant

Metformin, Metformin DC

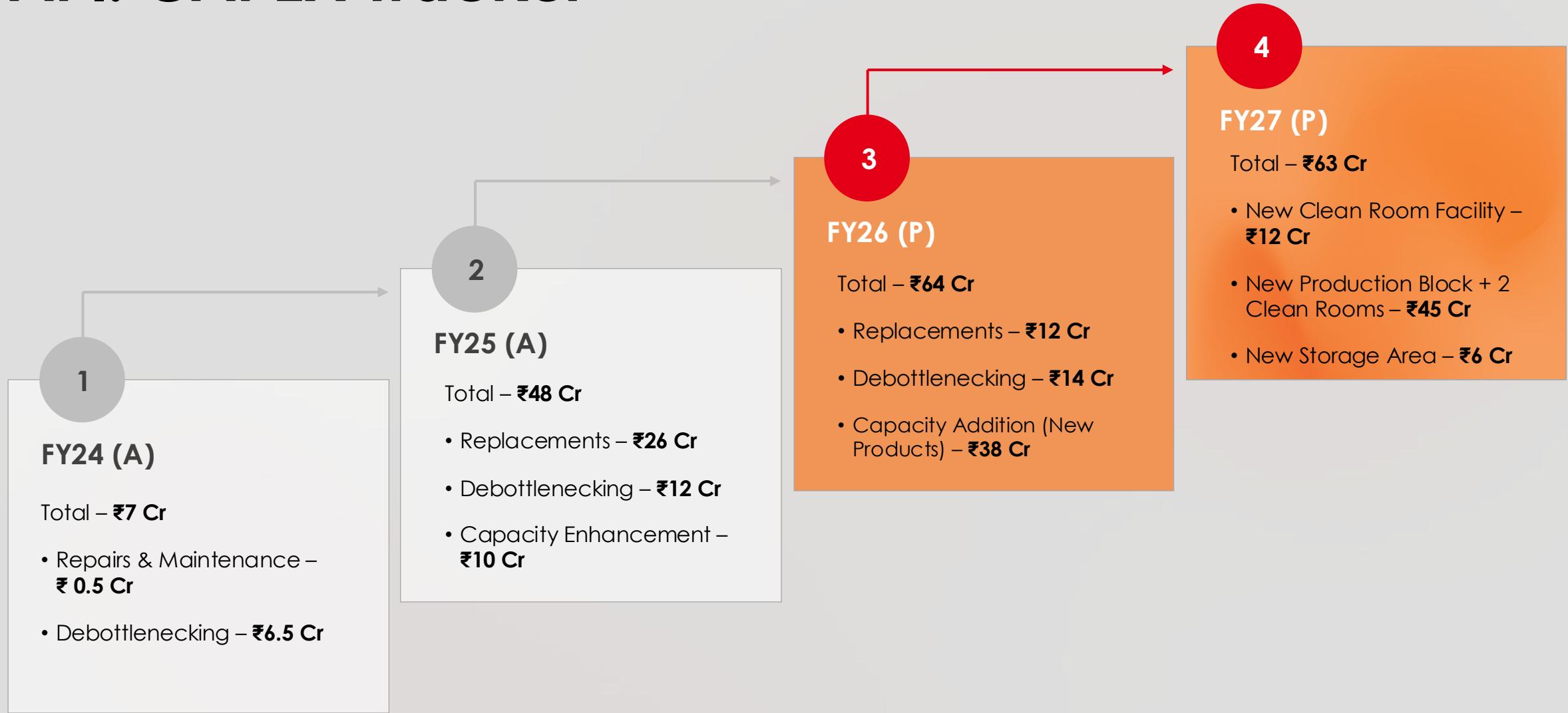
Cumulative installed reactor capacity:

500 KL

Future reactor capacity potential at existing sites:

600 KL

API: CAPEX Tracker



API: Developed Market Focused Business Profile



Focused on
regulated markets

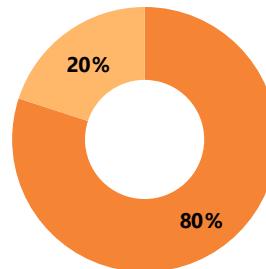


Exporting to
50+
countries

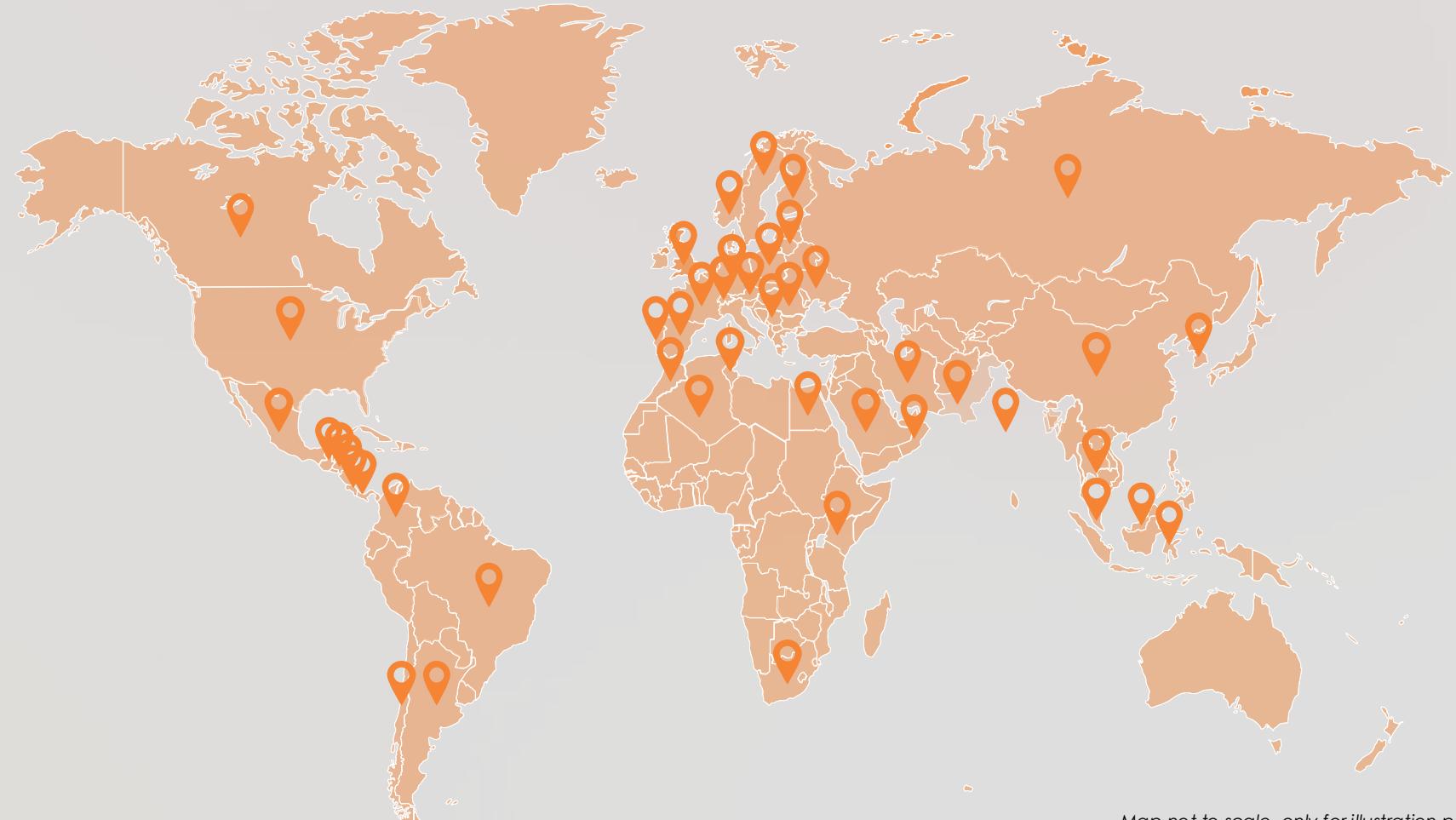


Exporting to
4+
continents

Total Revenue Mix



Exports Domestic



Map not to scale, only for illustration purpose.

API: Regulatory Approvals

US-FDA



US – FDA
Approval since **2000**
Last inspection **2024**



Europe – EDQM
Approval since **2007**
Last inspection **2014**

Brazil – ANVISA
Approval since **2024**
Last inspection **2024**



South Korea – KFDA
Approval since **2012**
Last inspection **2012**



Mexico – COFEPRIS
Approval since **2013**
Last inspection **2013**



WHO GMP
Approval since **2007**
Last inspection **2025**



WHO GMP
Approval since **2013**
Last inspection **2025**

DMF/CEP Filings with Global Regulatory Authorities

	Approved	Under Review & Pending	Total
USA	22	-	22
Europe	8	1	9
Brazil	1	5	6
South Korea	3	-	3
Mexico	-	-	-
ROW	30	-	30
Total	64	6	70

API: Manufacturing Capabilities



Chemistry Capabilities

- Azidation
- Bromination
- Cyanation
- Chiral Chemistry
- Optical Resolution
- Demethylation
- Grignard Reaction
- Sodium Metal Reactions
- Metal Hydride Reductions
- Friedel-Crafts Reactions
- Nitration
- Reductions
- Hydrogenation



Reaction Capabilities

- High Pressure Reactions
- High Vacuum Distillations
- Direct Compression (DC) Grade
- Manufacturing Different Polymorphisms
- Hydrated Molecules
- Handling Hygroscopic Products



System Capabilities

- Deployed SAP S4 HANA
- Dedicated software for Sales & Distribution functions
- Dedicated software for Fleet-on-Street
- Dedicated platforms used for sourcing & procurements
- Dedicated solutions for QC management

API: Strategy & Way Forward

Way Forward



Targeted expansion in regulated markets (US, EU, Brazil) – new & existing molecules



4 commercial launches of new molecules each year beginning FY27



Focus on a mix of:
 a) High-value or
 b) Large-volume + sizable market share molecules



Target patented molecules supply chain beyond FY29-30



Deploy backward integration selectively to optimize inputs cost & improve contribution margins



Product Selection Framework

Mid-Size Molecules

Small-to-Mid size molecules + Aim double-digit market share

Client Fit

Favour APIs requested by current marquee clientele

Margin Profile

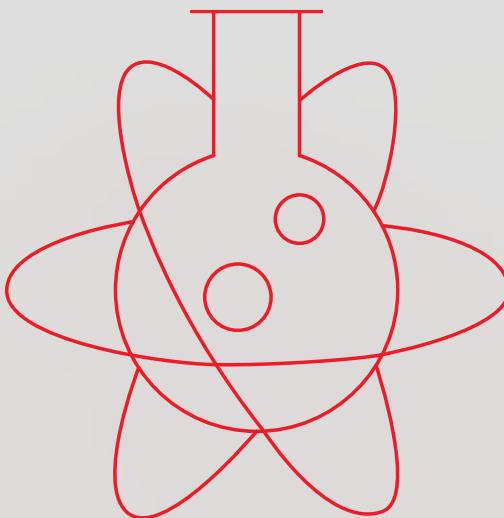
Aim for ~50% gross margins

API: Safety First Culture



03

Business Profile: Formulations



Re-Building Business
Brand Portfolio
Strategy & Way Forward

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Formulations: Re-Building Business

Overview

- Formulations business journey commenced in 1995 with the acquisition of Wander Ltd, formerly a division of Sandoz
- Current portfolio is focused on therapeutics such as anti-cold & cough, anti-infective, anti-inflammatory, analgesic, antipyretic, orthopaedic and constipation medications, as well as protein supplements, multivitamins, and multimineral supplements
- Operating through a fully outsourced manufacturing model, enabling enhanced scalability and flexibility
- Strategic emphasis remains on building strong brands & distribution channels, driven by a dedicated business excellence team



10+

Brands

100%

Acute Therapy

300+

Field Force

30,000+

Doctors Engaged

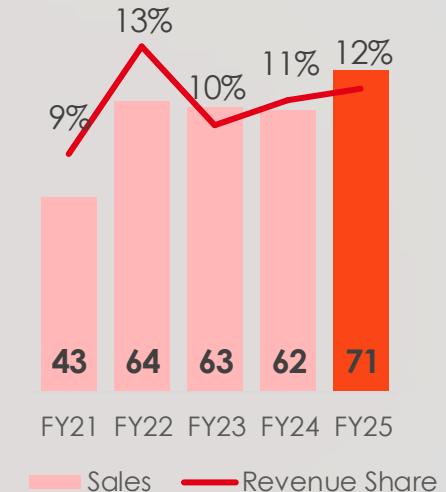
17

C&F Agents

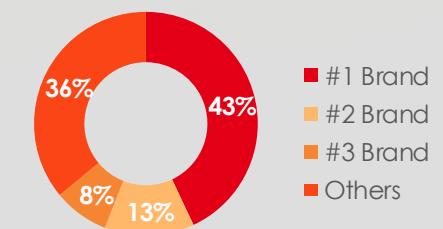
1,800+

Distributors

Formulations - Revenue & Share



Revenue Mix – Top Brands



Formulations: Brand Portfolio

Top brands

Coriminic®

Anti Cold & Cough



Chymonac®

Pain & Inflammation,
Muscular Spasm



RabiPlus™

Antacids & Anti-ulcerants



Senasof®

Herbal Laxative



Nurture®

Protein Supplement



ADTROL

Calcium Supplement -
Osteoporosis & Bone Health



WANBURY C RED

Nutritional Supplement



Zeva®

Multivitamin Supplement



Formulations: Strategy & Way Forward

Operational Objectives

1 Latest brand launch (FY25)

C RED (Iron Supplement)

2 Upcoming therapeutic launches

Paediatrics, Dermatology: Better right-to-win through existing brand equity with Paediatricians

Cardiology & Diabetes: Launching chronic & speciality products to improve productivity & add portfolio diversity

Speciality Segments: Building presence across GYN/PED/CP/ORTHO/SUR segments

3 Planned geographic expansion

Expansion into newer attractive regions

Increasing field force for existing regions

Strategic Way Forward



Leverage 3+ decades of heritage to re-build a scalable branded formulations franchise



Transition portfolio from acute therapeutics towards speciality and chronic segments through new launches



Geographical expansion in newer attractive markets



Achieve profitability break-even in FY26 through better scale & cost-management efforts



Deliver sustainable profitability FY27 onwards, through: Scaling top brands, launching new therapies, increasing front-line doctor engagement

04

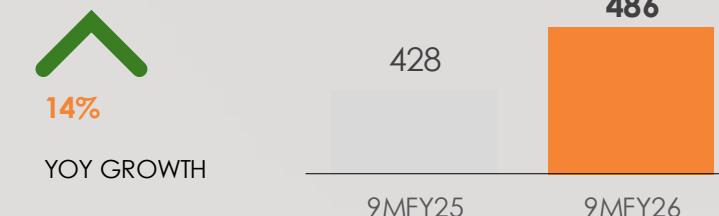
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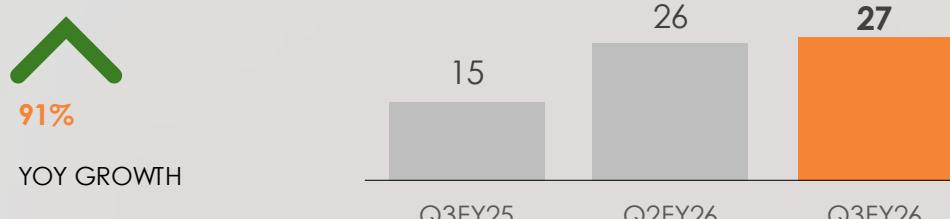


Q3 & 9MFY26 Performance Highlights

Revenue (in ₹ Crore)



EBITDA (in ₹ Crore)



PAT (in ₹ Crore)



Business Vertical Performance

API - Revenue (in ₹ Crore)



Formulations - Revenue (in ₹ Crore)



Q3 & 9MFY26 P&L Snapshot

PARTICULARS (in ₹ Crore)	Q3FY25	Q2FY26	Q3FY26	YOY Change	QOQ Change	9MFY25	9MFY26	YOY Change
Revenue from Operations	133.45	160.06	162.45	1.49%	21.73%	427.51	485.69	13.61%
Other Income	0.84	0.20	0.18	-12.40%	-78.72%	1.65	0.73	-55.75%
COGS	61.88	67.06	68.80	2.60%	11.19%	210.15	211.20	0.50%
Gross Profit	72.41	93.20	93.83	0.67%	29.57%	219.01	275.22	25.66%
Gross Margin (%)	54.26%	58.23%	57.76%	-47.45	349.53	51.23%	56.67%	543.54
Operating Expenses	57.63	67.22	66.96	-0.39%	16.19%	170.67	197.58	15.77%
EBITDA	14.78	25.98	26.86	3.40%	81.73%	48.34	77.64	60.60%
EBITDA Margin (%)	11.08%	16.23%	16.54%	30.44	545.99	11.31%	15.98%	467.69
Finance Cost	10.17	7.12	7.26	1.98%	-28.59%	27.91	21.92	-21.46%
Depreciation	3.32	3.70	3.74	1.00%	12.48%	9.94	11.09	11.55%
Profit before Tax	1.29	15.16	15.87	4.64%	1127.85%	10.50	44.63	325.20%
Profit after Tax	1.22	15.18	15.76	3.81%	1194.16%	10.27	44.43	332.47%
PAT Margins (%)	0.91%	9.48%	9.70%	21.67	878.85	2.40%	9.15%	674.47
Basic EPS (in ₹)	0.38	4.58	4.52	-1.33%	1089.21%	3.14	13.22	320.99%

Management Commentary



Mr. Mohan Kumar Rayana
Promoter & Whole Time Director

“Wanbury has delivered a robust performance during the quarter and nine-month, reflecting strong operational execution and continued focus on profitability. Revenue from Operations registered a growth of 22% YOY in Q3FY26, while 9MFY26 revenues increased by 14% YOY, supported by healthy demand and higher volumes across both business segments.

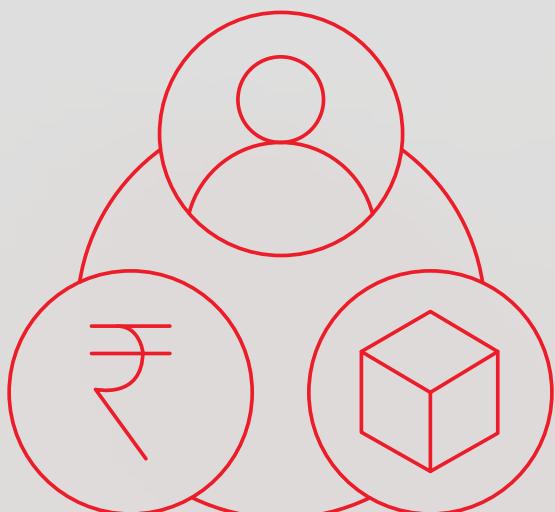
Profitability metrics remained strong, with improvement in operating efficiency leading to higher margins. EBITDA increased by 91% YOY in Q3 and 65% YOY in 9MFY26, with margins improving both on a YOY and sequential basis. This strong operating performance, along with moderated finance costs, has translated into significant growth in Profit After Tax. The improvement in operating profitability was driven by several operational initiatives, including better procurement strategies, higher product yields, and enhanced solvent recovery systems.

Operationally, both business divisions continue to perform well. The API business achieved an important milestone with the commissioning of a new production block at the Tanuku facility, where manufacturing has commenced for a high-potent anaesthetic product. The Company also dispatched its first commercial shipment of this product to a European customer. The API business is now well-positioned for a healthy growth phase, supported by the new production block at Tanuku and the planned launch of multiple new products in the coming financial year.

On the Formulations front, recent product launches and increasing business scale have delivered encouraging results. The segment has been EBITDA positive for both Q3 and 9MFY26, contributing positively to the Company's operating profitability. With a healthy pipeline of further product launches and growing presence across new therapeutic categories, the Company expects the Formulations business to deliver stronger performance in the coming year.”

05

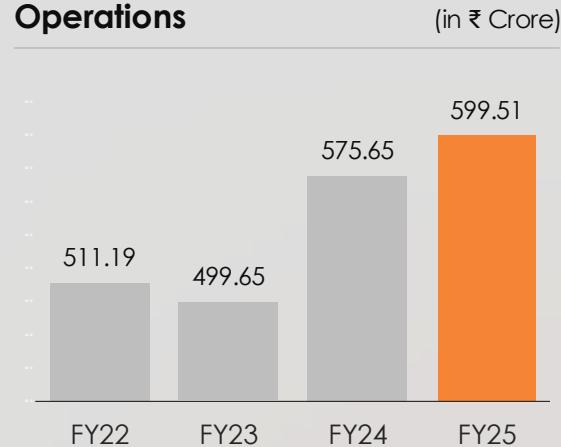
Financial Profile



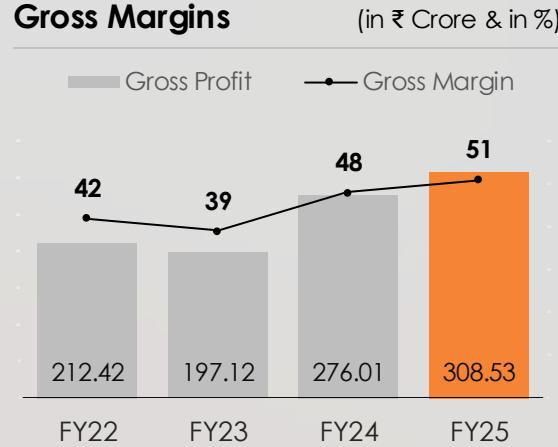
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Key Performance Indicators

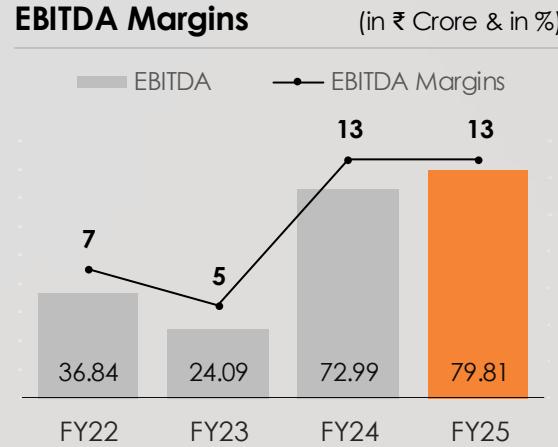
Revenue from Operations



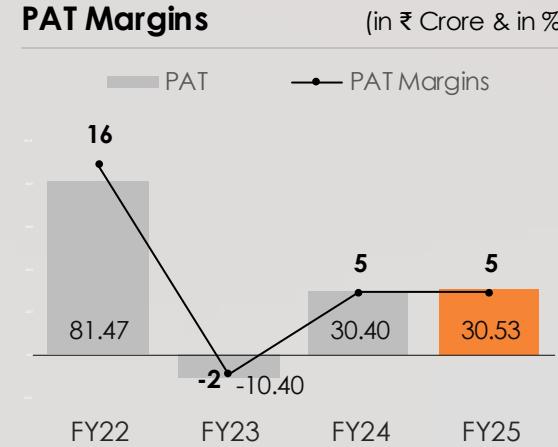
Gross Profit & Gross Margins



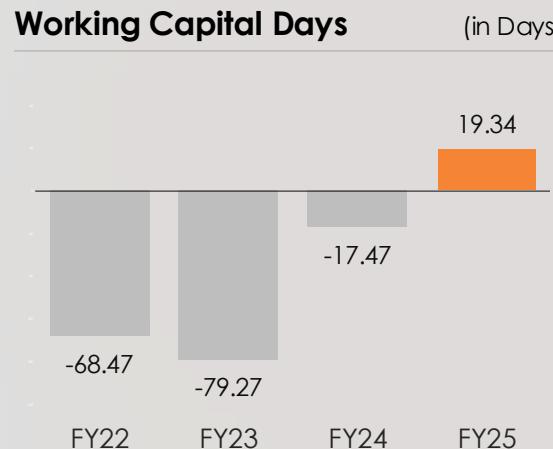
EBITDA & EBITDA Margins



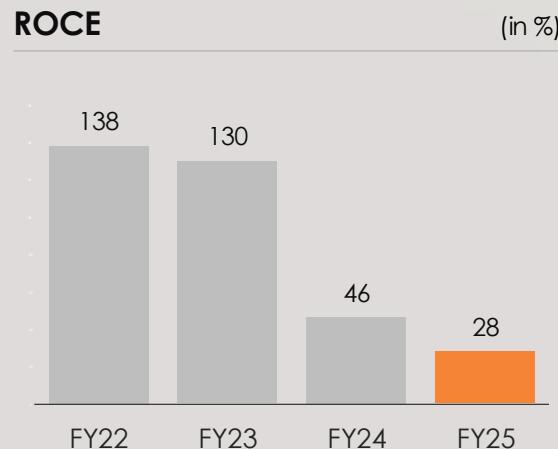
PAT & PAT Margins



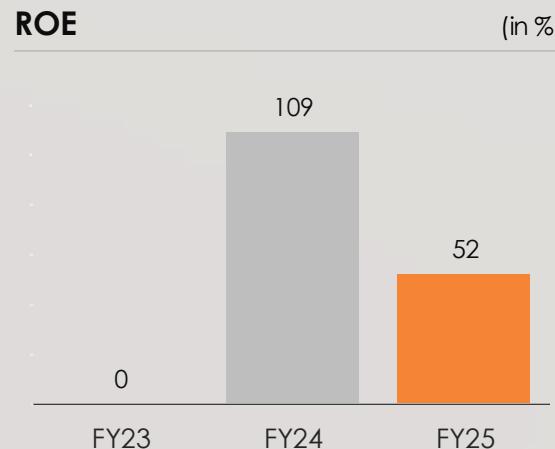
Working Capital Days



ROCE



ROE



5Y P&L Snapshot

PARTICULARS (in ₹ Crore)	FY21	FY22	FY23	FY24	FY25
Revenue from Operations	392.5	511.2	499.7	575.7	599.51
Other Income	2.4	1.51	0.91	2.99	3.49
COGS	221.3	300.3	303.4	302.6	294.47
Gross Profit	173.6	212.4	197.1	276	308.53
Gross Margin (%)	44%	42%	39%	48%	51%
Operating Expenses	153.2	175.6	173	203	228.73
EBITDA	20.42	36.84	24.09	72.99	79.81
EBITDA Margin (%)	5%	7%	5%	13%	13%
Finance Cost	23.07	20.61	21.4	29.18	36.95
Depreciation	9.75	11.45	12.38	13.03	13.31
Exceptional Item	-	76.37	-0.6	-	-
Profit before Tax	-12.4	81.13	-9.69	30.78	29.55
Profit after Tax	-12.61	81.47	-10.4	30.4	30.53
PAT Margins (%)	-3%	16%	-2%	5%	5%
Basic EPS (in ₹)	-5.04	25.29	-3.18	9.29	9.32

5Y Balance Sheet Snapshot

PARTICULARS (in ₹ Crore)	FY21	FY22	FY23	FY24	FY25
Equity Share Capital					
Equity Share Capital	25.01	32.67	32.7	32.74	32.77
Other Equity	-155.7	-30.48	-39.96	-4.8	26.5
Non-Current Liabilities					
Long Term Borrowings	71.99	-	-	82	160.29
Others	18.07	16.2	16.31	19.45	19.74
Current Liabilities					
Short Term Borrowings	88.43	67.02	64.14	27.27	12.94
Trade Payables	133.27	191.1	148.2	162.8	138.46
Advances from customers	3.32	14.92	9.27	2.78	2.97
Others	103.18	59.54	71.58	20.93	20.25
Total Equity and Liabilities	287.6	351	302.2	343.1	413.92
Non-Current Assets					
Tangible Assets	158.11	148.7	151.5	149	189.69
CWIP	11.01	2.35	1.61	3	5.38
Others	22.53	30.24	28.59	32.19	25.4
Current Assets					
Inventories	24.85	49.73	21.99	36.02	37.68
Trade Receivables	34.47	62.8	68.98	89.44	114.16
Current Investments	-	-	-	-	-
Cash & Bank Balances	11.66	25.27	3.89	5.9	12.83
Others	24.97	31.9	25.68	27.55	28.78
Total Assets	287.6	351	302.2	343.1	413.92

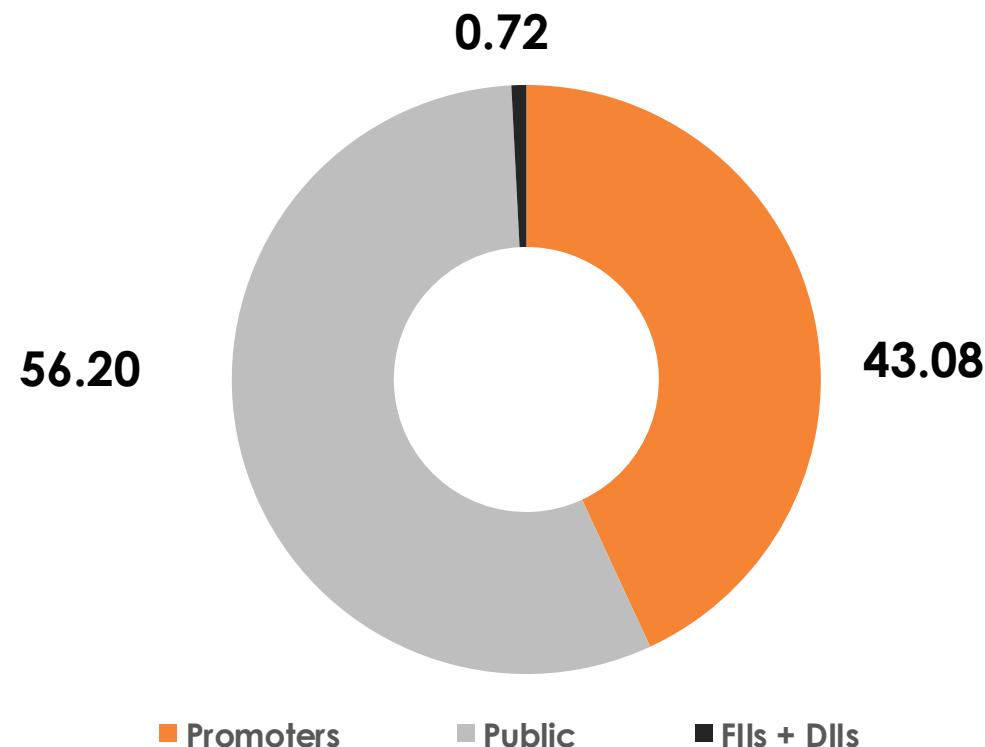
5Y Cash Flow Snapshot

PARTICULARS (in ₹ Crore)	FY21	FY22	FY23	FY24	FY25
Cash Flow from Operating Activities	16.68	37.56	19.8	4.02	26.1
Cash Flow from Investing Activities	8.04	0.59	-8.84	-16.62	-51.17
Cash Flow from Financing Activities	-17.38	-25.62	-31.99	14.55	25.73
Net Cash Flows	7.34	12.53	-21.03	1.95	0.66
Cash at the Beginning of Year	2.62	9.96	22.49	1.45	3.4
Cash at the End of Year	9.96	22.49	1.46	3.4	4.06

Capital Markets Overview

Shareholding Pattern

(%)



Shareholding data as of 31st December 2025

Current Market Price

52 Week High/Low

Market Capitalization

No. of Shares Outstanding

NSE

BSE

₹262

₹330 / ₹154

₹915 Crore

3.49 Crore

WANBURY

524212

Market price data as of 5th February 2026

Get in Touch

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