

February 09, 2026

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 nine months ended December 31, 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 nine months ended December 31, 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*

Earnings Presentation - Q3FY26

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Content



Q3FY26 Performance



Business Overview



Annexures



Management's Message



Mr. Gurdeep Soni

Promoter, Chairman & Managing Director

As we look at the industry today, the operating environment is becoming progressively more constructive, although the pace and shape of recovery continues to vary across segments and geographies. Different end markets are at different stages of stabilisation and recovery.

Against this backdrop, Uniparts' diversified presence across off highway industry segments and geographies is enabling us to benefit from this unequal recovery. Over the last four quarters, we have seen steady improvement in our order book, and our Q3 FY26 performance reflects this momentum. We delivered ca. 35% year-on-year growth in Q3 FY26, with a small improvement over Q2 FY26, despite Q3 typically being the seasonally weakest quarter of the year.

Our business model continues to demonstrate its resilience. Our dual-shore manufacturing and near-shoring delivery model, combined with long-standing customer relationships, allows us to respond effectively as demand returns across markets. Importantly, warehouse-led sales now account for over 50% of revenues in the first nine months of FY26, which is where we create the highest value for our customers through agility, resilience, and proximity—capabilities that are not easily replicable.

Mr. Paramjit Singh Soni

Promoter, Vice Chairman and Executive Director





Construction Equipment

In the new year 2026, the construction equipment industry is expected to progress through a phase of steady, measured growth, supported by different demand drivers across geographies.

In the United States, construction activity continues to be underpinned by infrastructure spending, investments in data centres and energy-transition projects.

Our customer commentary suggests sequential improvement through the year, with demand expected to strengthen in the second half of CY26.

In Europe, the recovery remains uneven but is gradually improving. Infrastructure spending, ESG-driven refurbishment, and selective recovery in residential construction are supporting demand. Overall, the European construction market is expected to remain stable, with modest improvement through CY26.

Across regions, construction demand is characterised by lower volatility and better visibility compared to other end markets, supported by multi-year project pipelines and relatively stable replacement demand. New business wins, coupled with an improving industry cycle, are driving growth momentum in this segment for Uniparts.

Small Agriculture

Small Ag is recovering ahead of Large Ag. Industry expectations indicate flat to low single-digit growth for the segment across North America and Europe. In India, demand remains robust, supported by favorable monsoons, healthy reservoir levels, GST reductions, and steady farmer sentiment.

With inventory replenishment beginning across markets, Uniparts with a strong market share and diversified presence in this segment is expecting to see a healthy growth.





Large Agriculture

Based on current industry indicators and the cycle progression, it is fair to say that Large Agriculture is moving past the most challenging phase of the cycle, although the recovery remains gradual and uneven across regions.

In North America, the rate of decline has moderated materially, with current expectations indicating a 15-20% contraction, a meaningful improvement over CY25. This moderation is consistent with late-cycle stabilisation dynamics.

Europe appears to be further along the recovery curve, with industry expectations pointing to flat to modest growth, supported by improving farm economics and export demand.

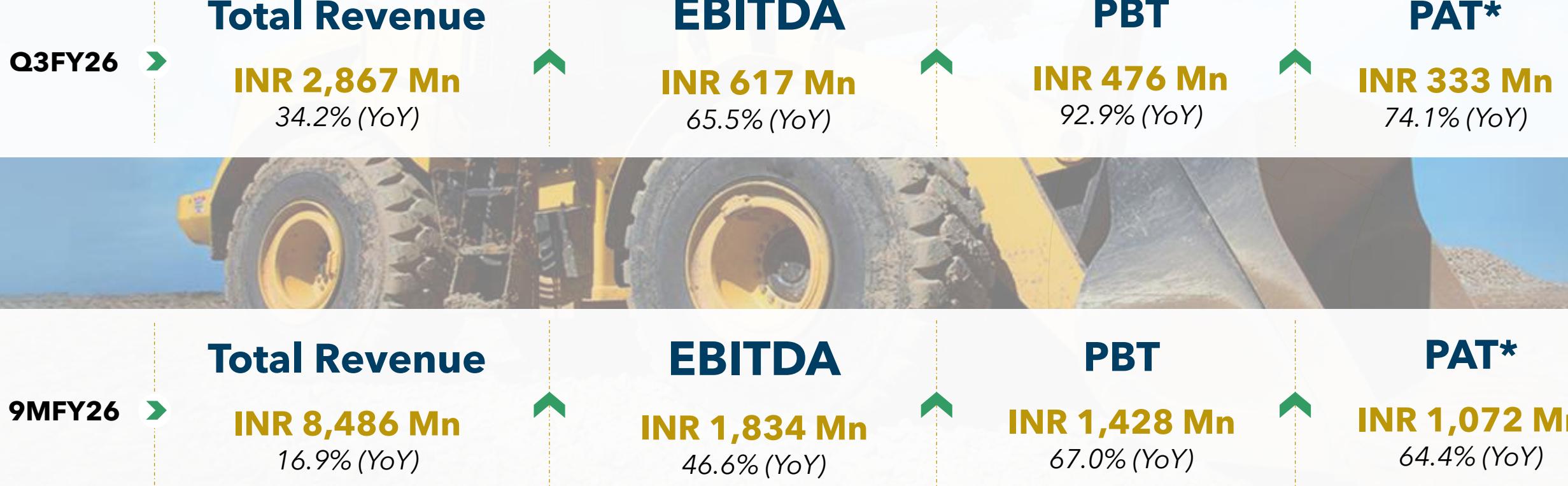
For Uniparts, this segment continues to present an attractive opportunity, underpinned by new program wins in Europe and the company's diversified exposure, positioning it well as demand normalises.

Aftermarket

The aftermarket business continues to be a stable contributor. While tariffs have had some short-term impact, the structural fundamentals of the aftermarket remain intact, and diversification across regions and customer segments provides additional resilience.



Key Takeaways from Q3 & 9M FY26



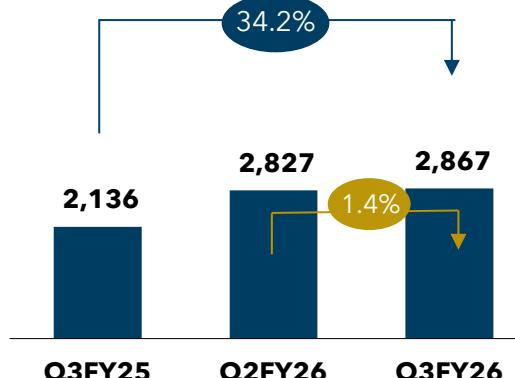
Note: Total Revenue, EBITDA, PBT and PAT include other income

* PAT includes one time exceptional cost of INR 34.19 Mn as impact of labour code

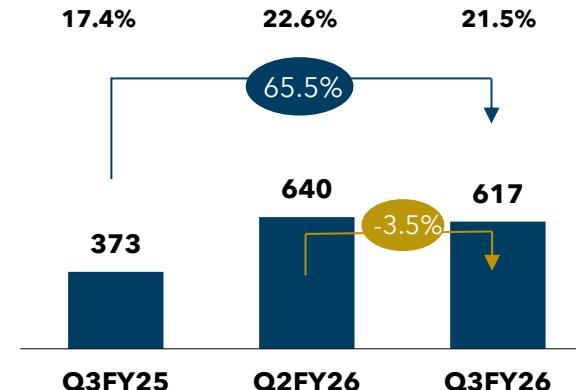


Key Takeaways from Q3 & 9M FY26

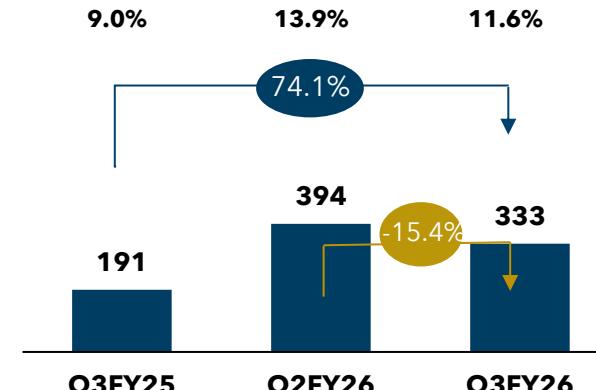
Total Revenue (INR Mn)



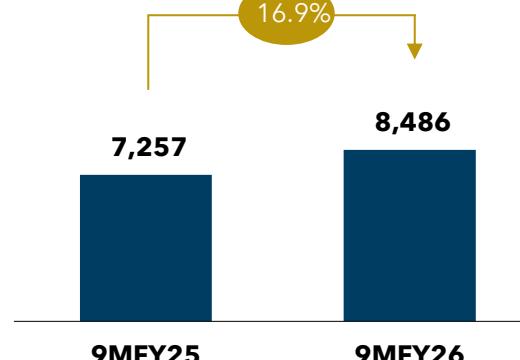
EBITDA (INR Mn) & Margins (%)



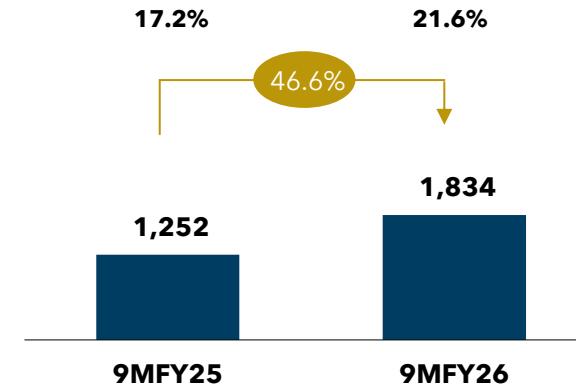
PAT *(INR Mn) & Margins (%)



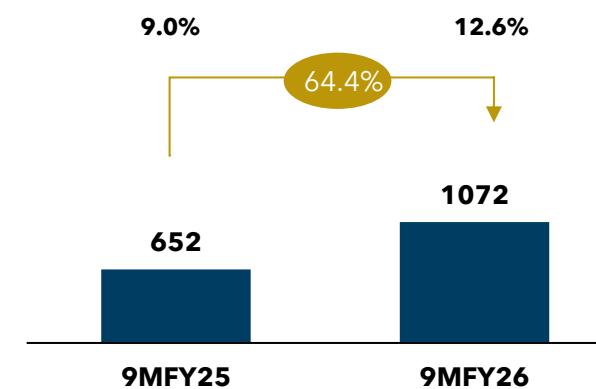
Revenue Growth (%)



EBITDA Growth (%)



PAT Growth (%)



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

* PAT includes one time exceptional cost of INR 34.19 Mn as impact of labour code

Q3FY26 Results (Consolidated)

Figures in INR Mn	Q3FY26	Q2FY26	Q3FY25	QoQ Change	YoY Change
Revenue from Operations	2,810	2,768	2,083	1.5%	34.9%
Other Income	57	59	53		
Cost of materials consumed (including change in inventory)	914	846	694		
Gross Profit Margin (As % of Revenue from Ops)	67.5%	69.4%	66.7%		
EBITDA	617	640	373	-3.5%	65.5%
EBITDA Margin(%)	21.5%	22.6%	17.4%		
Operating EBITDA (EBITDA - Other Income)	560	581	320	-3.5%	75.0%
Operating EBITDA Margin(%) (As % of Revenue from Ops)	19.9%	21.0%	15.4%		
Depreciation & Amortization Expense	114	111	106		
EBIT	503	529	266	-4.8%	89.0%
EBIT Margin(%)	17.6%	18.7%	12.5%		
Finance Cost	27	24	19		
PBT - Before Exceptional Item	476	505	247	-5.7%	92.9%
Exceptional Item - Impact of Labour Code	-34				
PBT - After Exceptional Item	442	505	247	-12.5%	78.9%
Tax Expense	109	111	56		
PAT	333	394	191	-15.4%	74.1%
PAT Margin(%)	11.6%	13.9%	9.0%		
Basic EPS (INR)	7.4	8.7	4.2		



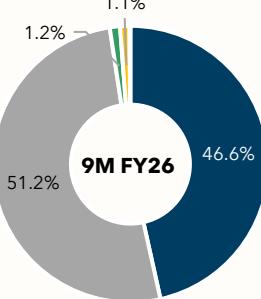
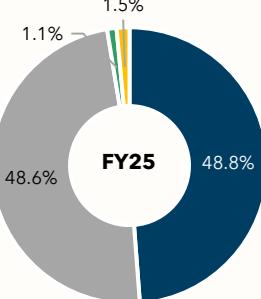
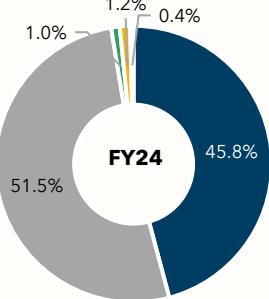
Revenue Distribution

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

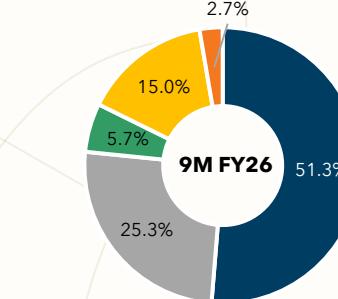
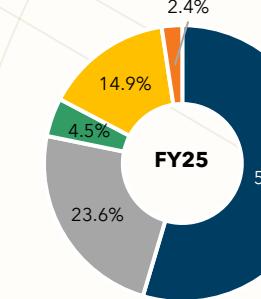
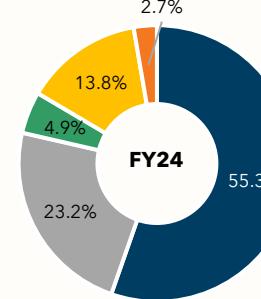
Healthy Revenue Mix

INR Mn, Segment revenue as % of finished goods sales

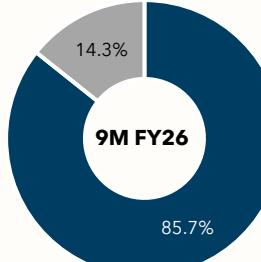
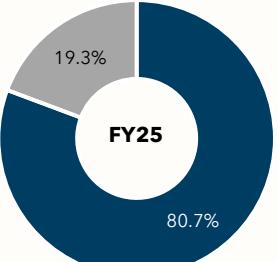
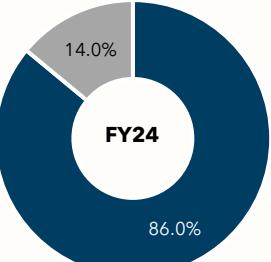
Product Vertical



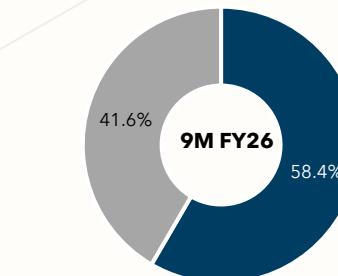
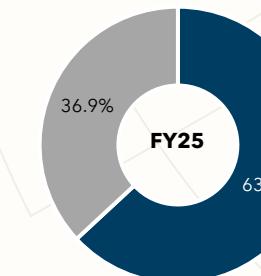
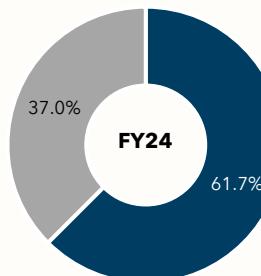
Geographical Presence



Market Presence



Segmental Presence



Passion

Innovation

Integrity

Excellence

Team Work

Content



Q3FY26 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



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*: 51%

- 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 serviced
Customers serviced



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

Deepen wallet share

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

Hydraulic Cylinders



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

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

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

Healthy Margin Profile

Long term margin guidance remains at 20%



Warehouse and Manufacturing Facilities

Dual Shore Manufacturing & Warehousing Solutions

Manufacturing Location Warehouse Location Distribution Centre



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

- Manufactured and delivered in same geography

Direct Export

- Manufactured in India for export around the world

Warehouse Sales

- Products stocked in warehouse for offtake

Model specification

- Shorter lead times
- Flexible batch sizes

- Competitive pricing
- Longer lead times
- Longer inventory cycle

- Just in Time delivery from local warehouse
- Customized packing and lot sizes
- Lower inventory cycle for customers

Model features

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**.



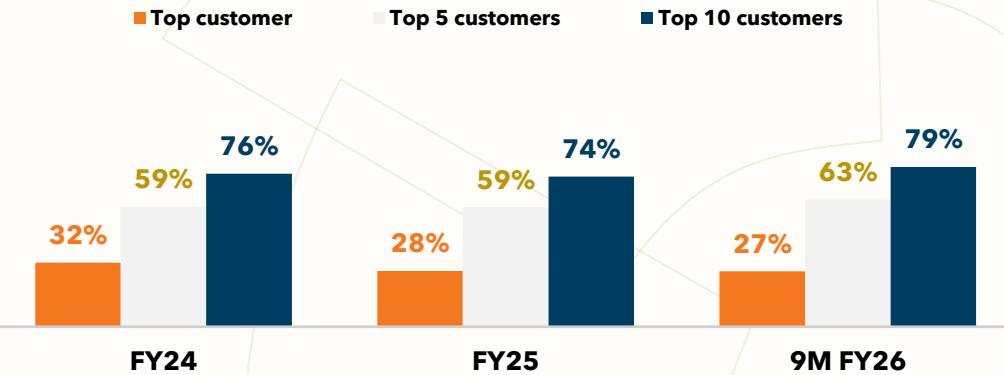
Involved from the design stage for new products and launches providing **end-to-end solutions**.



*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.

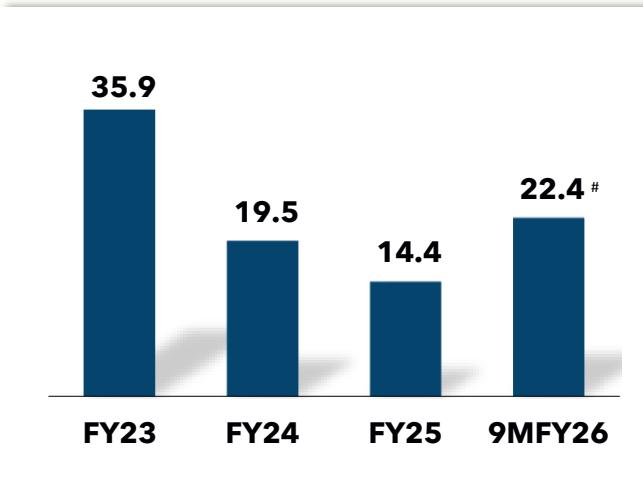


Expand geographically
in Japan, Korea and
other Asia Pacific
nations

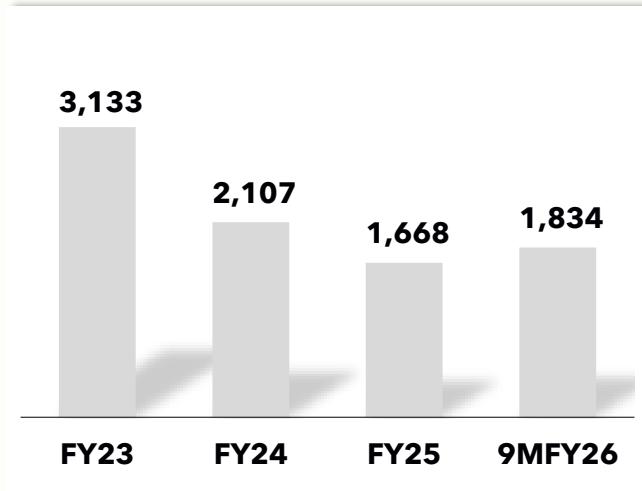


Key Financial Metrics - Historical

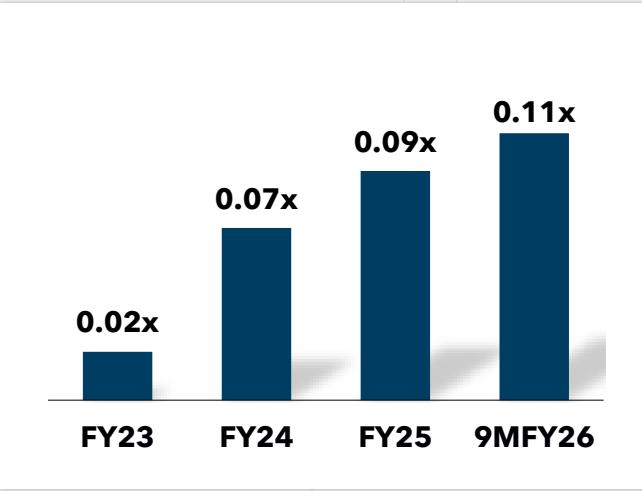
RoCE (%)



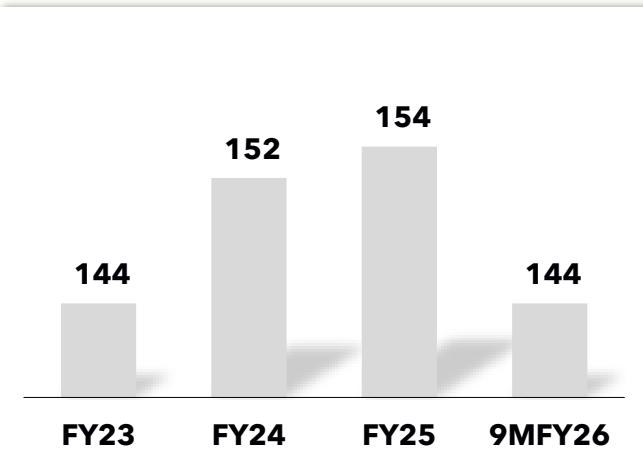
Reported EBITDA (INR Mn)



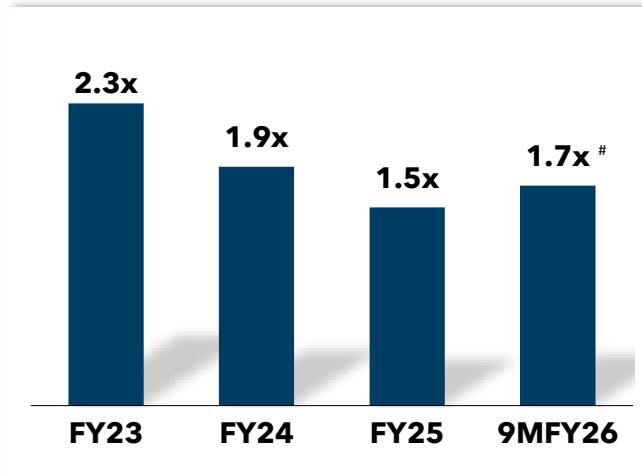
Debt / Equity



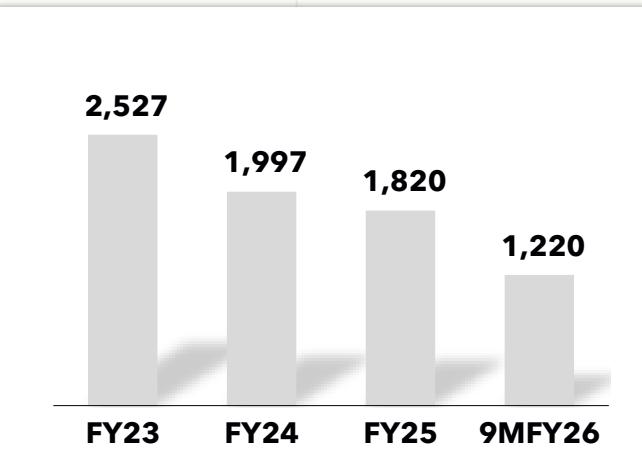
***Working Capital Days**



****Fixed Assets Turnover**



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



Historical Balance Sheet

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

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



Content



Q3FY26 Performance



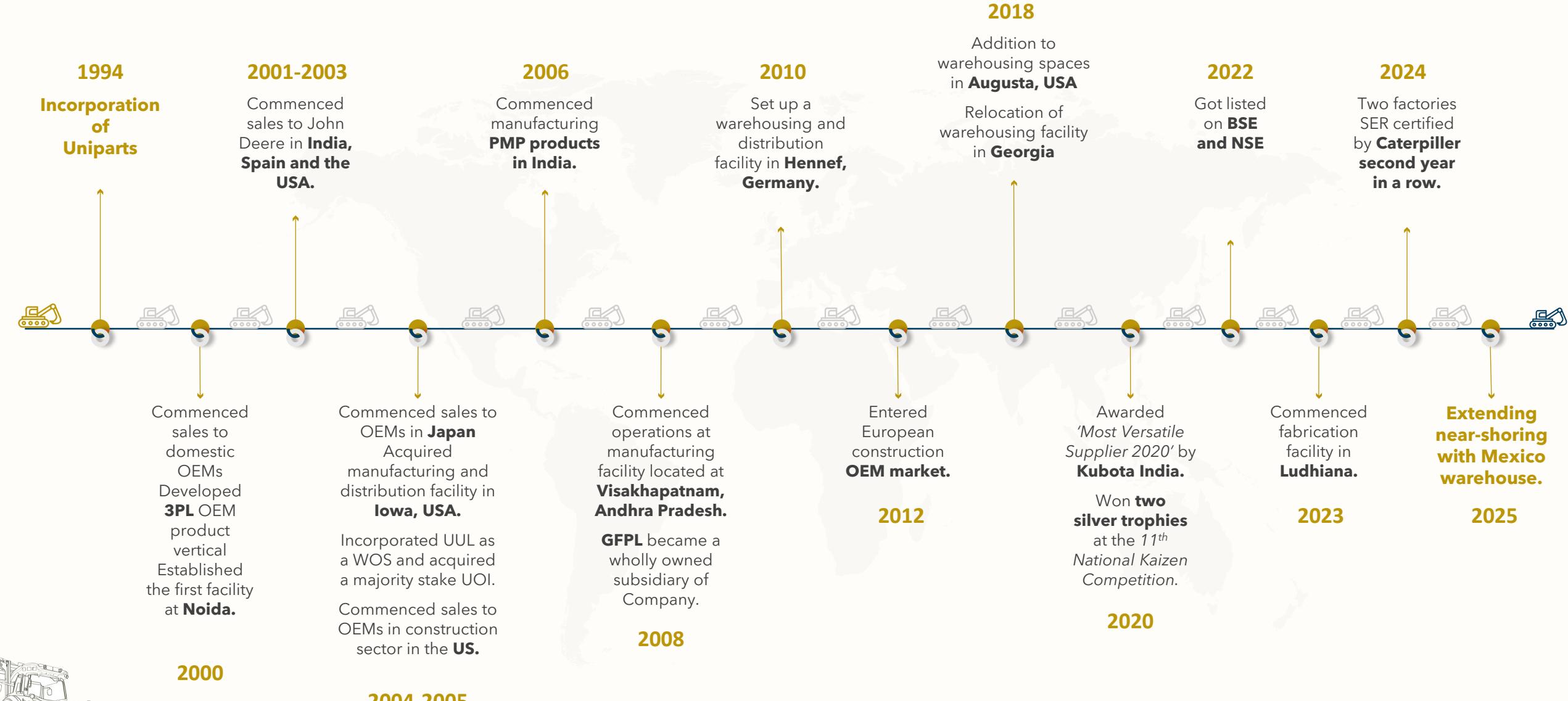
Business Overview



Annexures



Key Milestones



Group Structure



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

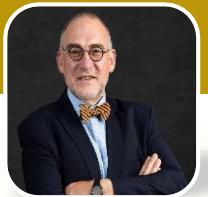
Masters' degree in Management Studies from BITS Pilani.
4 decades of experience in the Industry. *In charge of the aftermarket business.*



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



Ms. Tanushree Bagrodia
Wholetime Director & Group CEO

Location: India



Mr. Rohit Maheshwari
Group Chief Financial Officer

Location: India

Mr. Ajaya Chand

Ms. Celine George

Mr. Parmeet Singh Kalra

Mr. Sanjeev Kumar Chanana

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.*

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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