

Date: May 14, 2025

To,
The Manager
Listing Department
National Stock Exchange (NSE)
Exchange Plaza, 5th Floor
Plot No. C/1, G-Block
Bandra-Kurla Complex
Bandra (E), Mumbai - 400 051
Symbol: SAGILITY

To,
The Manager
Listing Department
Bombay Stock Exchange (BSE)
Phiroze Jeejeebhoy Towers
Dalal Street Mumbai - 400 001
Scrip Code:544282

Dear Sir/Ma'am,

Subject: Submission of Investor Presentation to be made to investors on May 15, 2025, pursuant to Regulation 30 read with Schedule III of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

In continuation to our letter dated May 09, 2025, we are enclosing herewith the presentation to be shared with investors regarding the audited financial results of the Company for quarter and year ended 31st March 2025 at 8:30AM (IST).

The details are also being made available on the Company's website <https://sagilityhealth.com/>

This is for your kind information and record.

Thanking You,

For Sagility India Limited

Satishkumar Sakharayapattana Seetharamaiah
Company Secretary & Compliance Officer
M. No: A16008

Encl: a/a

Sagility India Limited

(Formerly Sagility India Private Limited)

Registered Office - No. 23 & 24, AMR Tech Park, Building 2A, First Floor Hongasandara Village, Off Hosur Road, Bommanahalli, Bengaluru – 560068 Karnataka India

Corporate Identity Number: L72900KA2021PLC150054

Tel. No.: 080-71251500, Website: www.SagilityHealth.com



May 15, 2025

Investor Deck – FY25



Safe Harbour

Certain statements in this release concerning Sagility' future growth prospects may be seen as forward-looking statements, which involve a number of risks and uncertainties that could cause the actuals to differ materially from such statements. Sagility does not undertake to update any such statement that may have been made from time to time by or on behalf of the company..

Key Highlights

FY25 Highlights

- ▶ FY25 Revenue at ₹55,699 million, grew by ₹8,164 million Y-o-Y (corresponding to 17.2% growth Y-o-Y and 14.9% at constant currency).
- ▶ Adjusted EBITDA (excl Other Income) at ₹14,685 million, grew by ₹3,249 million Y-o-Y (corresponding to 28.4% growth Y-o-Y)
- ▶ Adjusted PAT at ₹8.107 million, grew by ₹ 2,211 million Y-o-Y (corresponding to 37.5% growth Y-o-Y)

Q4 FY25 Highlights

- ▶ Revenue in Q4 at ₹ 15,685 million grew by ₹2,853 million Y-o-Y (corresponding to 22.2% growth Y-o-Y and 17.7% at constant currency).
- ▶ Adjusted EBITDA (excl Other Income) at ₹4,042 million, grew by ₹899 million Y-o-Y (corresponding to 28.6% growth Y-o-Y)
- ▶ Adjusted PAT at ₹2,398 million, grew by ₹747 million Y-o-Y (corresponding to 45.2% growth Y-o-Y)

Key Business Highlights

- ▶ **FY25 concluded with robust year-on-year growth**, largely fueled by our tenured existing clients and logos won over the last couple of years. Total Q-o-Q growth of 7.9% in INR and 5.7% in constant currency was fueled by acquisition of Broadpath in Q4.
- ▶ Together with **tech- and transformation-led services**—powered by automation, analytics, and GenAI, and our **consulting services**, we are gaining strong traction with clients, further enhancing our reputation as a **trusted strategic and advisory partner**.
- ▶ Recent acquisition of BroadPath has the potential to unlock additional opportunities in several mid-market clients of Broadpath ; targeted cross-sell initiatives planned for FY26
- ▶ Operations remain robust, driven by **strong performance across key metrics**
- ▶ **People:** Global headcount stands at 39,409 as of Mar 2024.
 - ▶ 4,365 employees added during FY25 (12.5% Y-o-Y growth in headcount); Attrition at 27.5%*
- ▶ **Recognitions:** Major Contender in the Everest Group Payment Integrity Solutions PEAK Matrix® Assessment 2025; Major Contender in Healthcare Payer Business Process as a Service (BPaaS) – Solutions PEAK Matrix® Assessment 2024

* Voluntary attrition considering employees who were employees for more than 90 days (%) on an annualized basis exclude BroadPath

KPI	Q4'25	Q3'25	Q4'24	YoY%	FY'25	FY'24	YoY%
Revenue from Operation (in INR Million)	15,685	14,531	12,832	22.2%	55,699	47,536	17.2%
Revenue by Vertical Split							
By Payer %	89.7%	89.3%	90.8%		89.4%	90.3%	
By Provider %	10.3%	10.7%	9.2%		10.6%	9.7%	
Growth in revenue from operation (%)	22.2%	15.3%			17.2%	12.7%	
Adjusted EBITDA (in INR Million)	4,143	4,567	3,188	30.0%	15,248	11,715	30.2%
Adjusted EBITDA %	26.4%	31.4%	24.8%		27.4%	24.6%	
Adjusted PAT (in INR Million)	2,398	2,626	1,651	45.2%	8,107	5,896	37.5%
Adjusted PAT %	15.3%	18.1%	12.9%		14.6%	12.4%	
Total Number of Employees	39,409	39,595	35,044	12.5%	39,409	35,044	12.5%
Voluntary attrition rate* (%)	32.5%	21.8%	30.4%		27.5%	27.2%**	

*considering employees who were employees for more than 90 days (%) on an annualized basis. **FY attrition rate exclude BroadPath

Annual KPI's

KPI	FY'25	FY'24	FY'23
Number of Client groups*			
Active	75	44	35
Number of new client addition (Gross)	38	13	7
Client groups contribution to revenues			
Top 3 Client %	66.2%	68.3%	72.4%
Top 5 Client %	77.9%	79.2%	80.6%
Top 10 Client %	90.5%	91.4%	90.7%
Number of Million-dollar client groups			
Number of clients contributing more than US\$20 million	7	5	4
Number of clients contributing to US\$5 - US\$20 million	6	7	7
Number of clients contributing to US\$1 - US\$5 million	12	12	12
Number of clients contributing less than US\$1 million	50	20	12
Delivery sites			
Number of delivery sites	33	30	27
New site addition (Gross)	10	4	2

* Client groups comprise client entities together with their affiliates.

Financial Highlights



Strong FY25 Performance

FY25 Financial Highlights

- ▶ FY25 revenue stood at ₹55,699 Million (\$658.3 M)
 - ▶ 17.2% growth Y-o-Y (14.9% at constant currency)
- ▶ Adjusted EBITDA (excl OI) at ₹14,685 Million (\$173.6 M)
 - ▶ Adjusted EBITDA Margin : 26.4%
 - ▶ 28.4% growth Y-o-Y
- ▶ Adjusted PAT at ₹8,107 Million (\$95.8 M)
 - ▶ Adjusted PAT Margin: 14.6%
 - ▶ 37.5% growth Y-o-Y;
- ▶ OCF ₹12,141 Million (\$ 143.5 M)
 - ▶ 89.7% of EBITDA

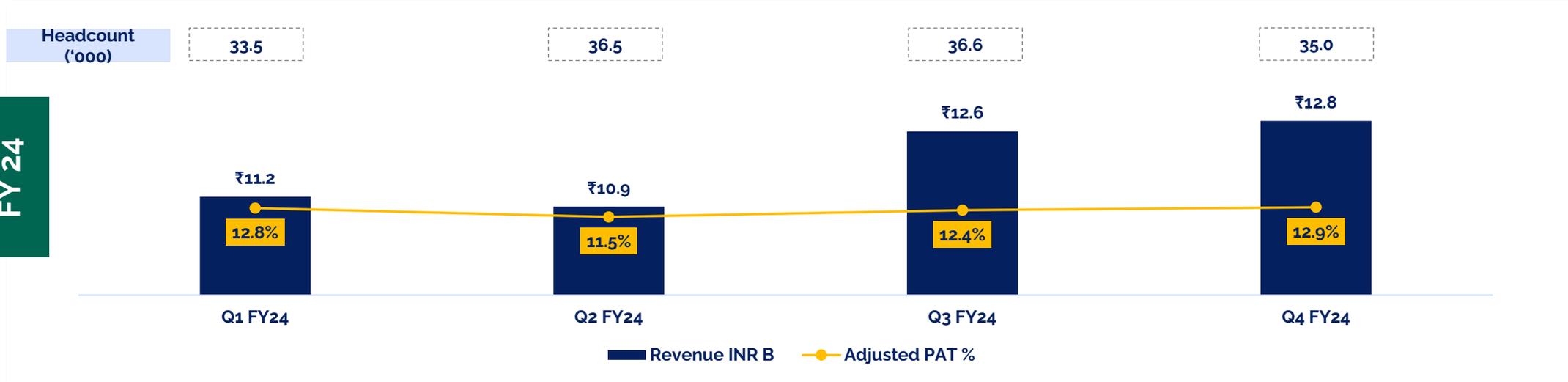
Q4 FY25 Financial Highlights

- ▶ Q4'25 revenue stood at ₹15,685 Million (\$181.8 M)
 - ▶ 22.2% growth Y-o-Y (17.7% at constant currency)
 - ▶ 7.9% growth Q-o-Q (5.7% at constant currency)
- ▶ Adjusted EBITDA (excl OI) at ₹4,042 Million (\$46.8 M)
 - ▶ Adjusted EBITDA Margin : 25.8%
 - ▶ 28.6% growth Y-o-Y;
- ▶ Adjusted PAT at ₹2,398 Million (\$27.8 M)
 - ▶ Adjusted PAT Margin : 15.3 %
 - ▶ 45.2% growth Y-o-Y
- ▶ OCF ₹3,009 Million (\$34.8 M)
 - ▶ 78.5% of EBITDA

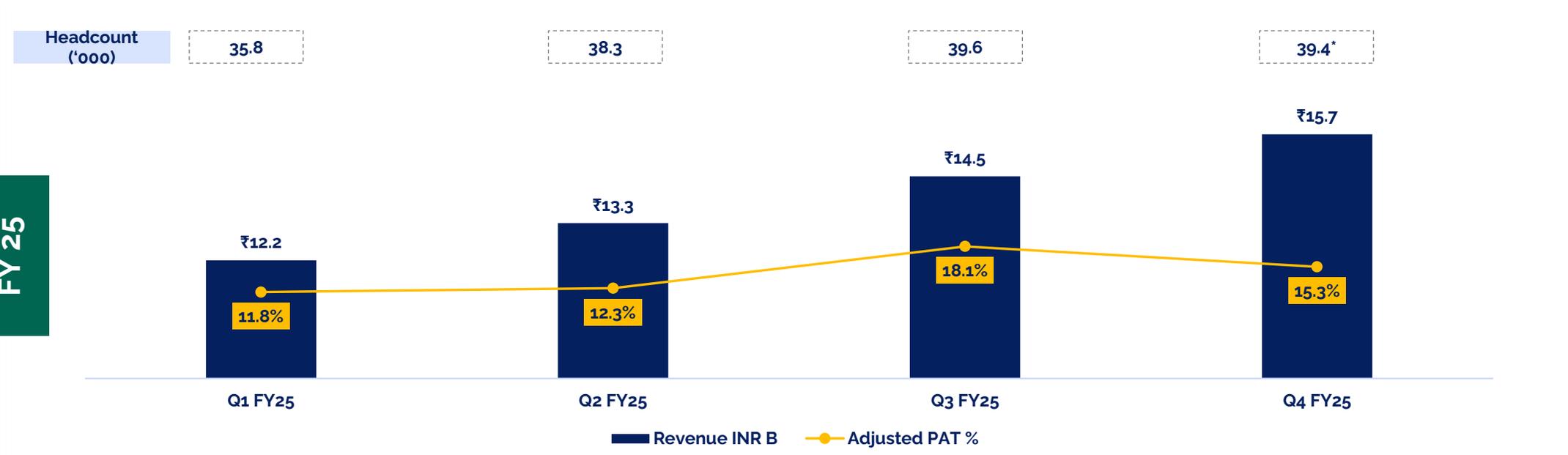
Quarter wise performance



FY 24

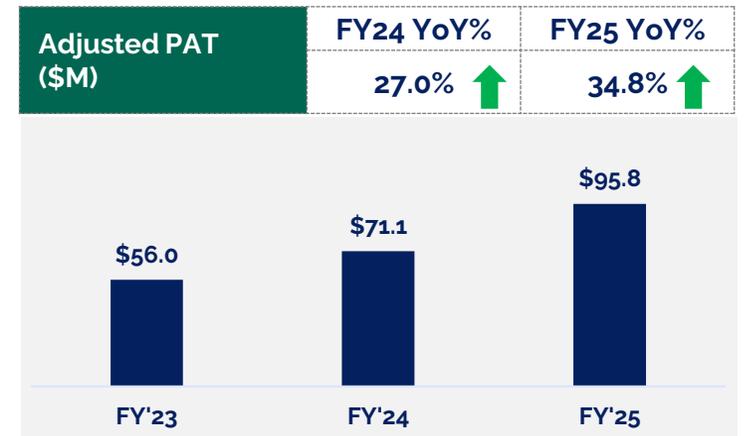
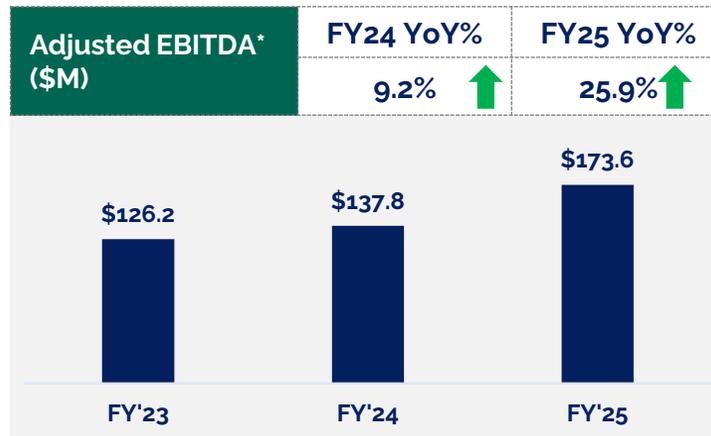
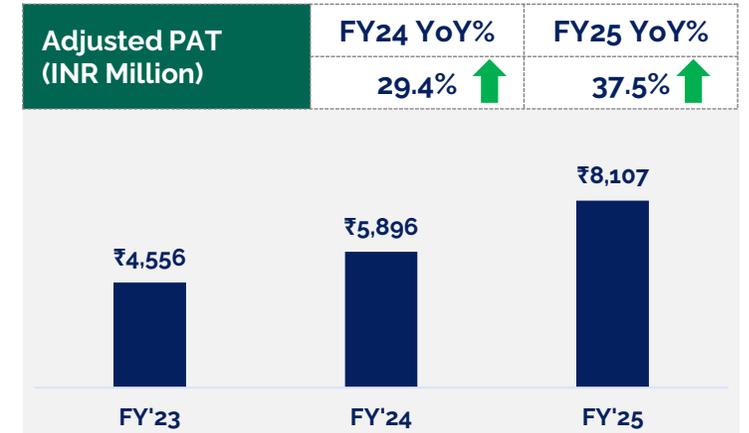
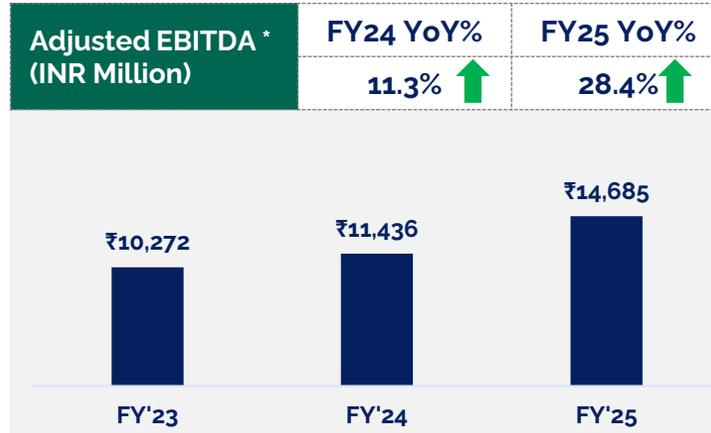
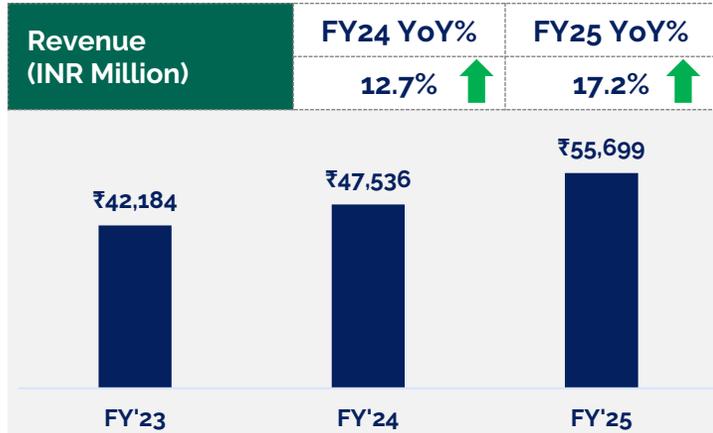


FY 25



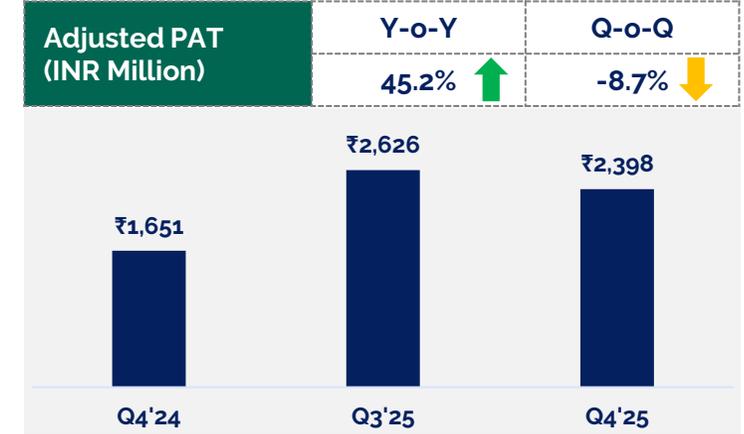
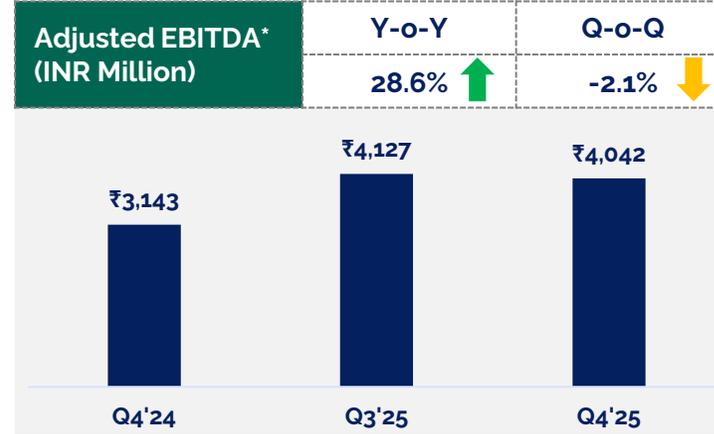
* Q4 FY 25 Headcount includes BroadPath Headcount of 1,083 (acquired in Q4 FY25)

Financial performance snapshot – Long Term



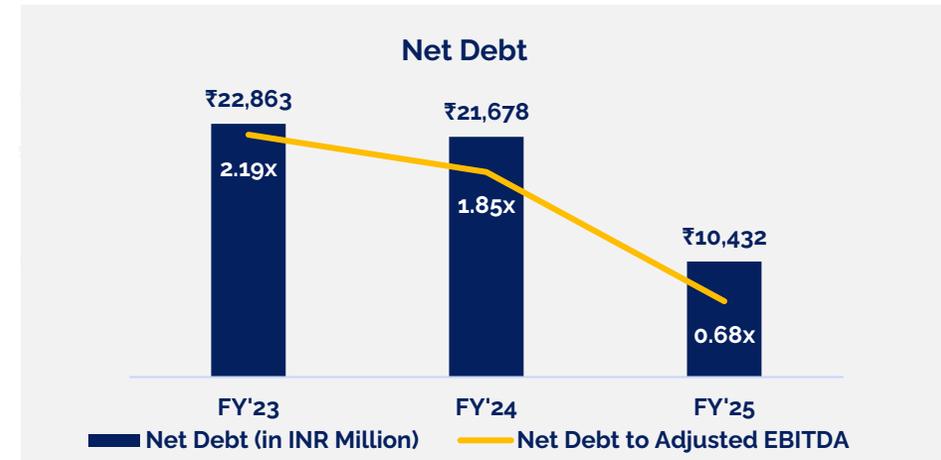
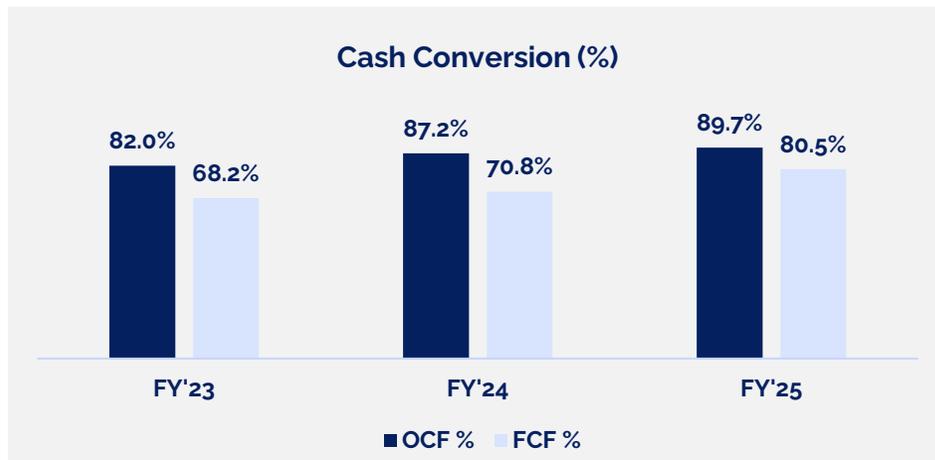
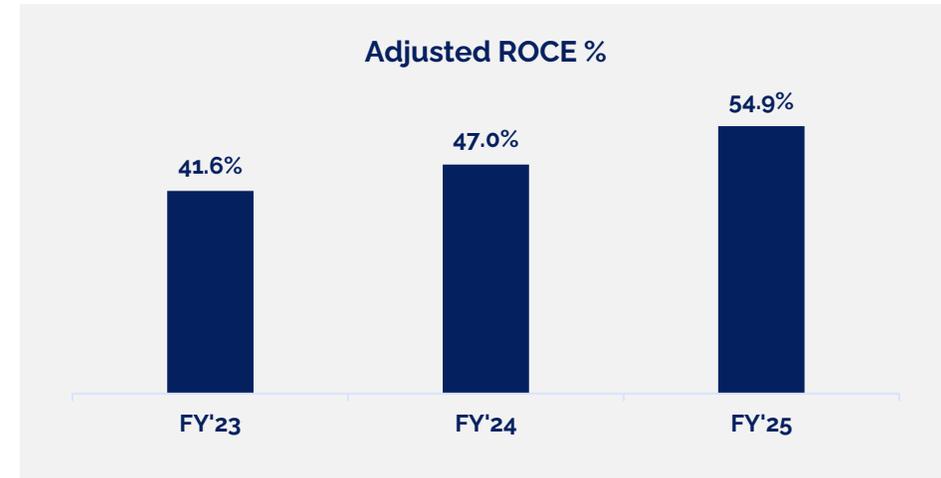
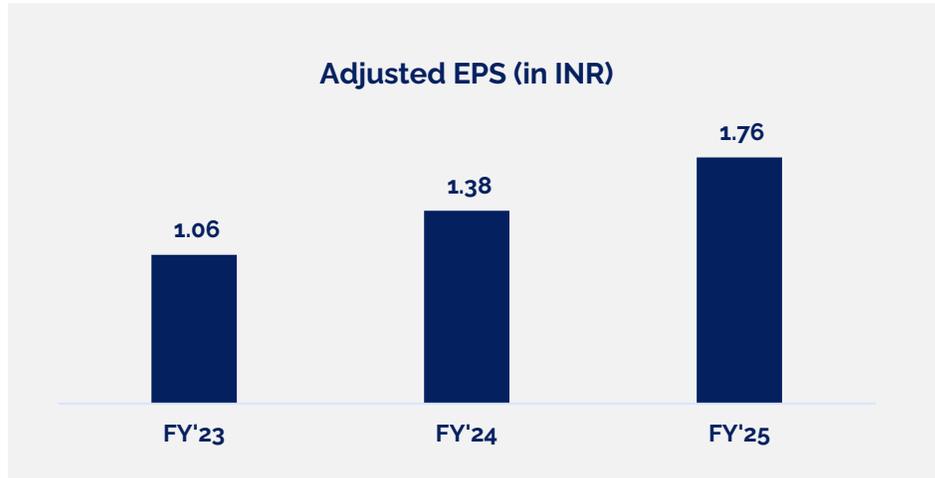
*Adjusted EBITDA excluding other income

Financial performance snapshot – Q4 FY25



*Adjusted EBITDA excluding other income

Financial Indicators



Adjusted EPS is Adjusted PAT divided by weighted average number of equity shares

Adjusted ROCE is Adjusted PAT plus Interest cost divided by capital employed (Assets excluding goodwill and intangibles assets less current liabilities)

Net Debt is Borrowing plus lease liabilities less Cash and Cash equivalent. Borrowing doesn't include accrued interest

Q4 & FY25 Consolidated Financials



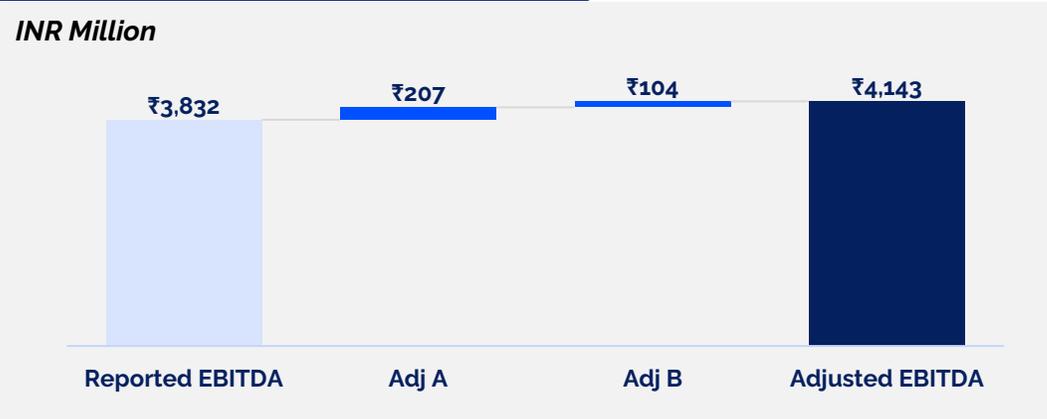
Amt in INR M

Particulars	Q4 FY25	Q3 FY25	Q4 FY24	YoY%	QoQ%	FY25	FY24	YoY%
Revenue from Operation	15,685	14,531	12,832	22.2%	7.9%	55,699	47,536	17.2%
Other Income	101	440	46			563	279	
Employee benefits expense	9,741	8,620	7,995			34,989	29,376	
Other expenses	2,212	1,988	1,764			7,731	7,278	
Reported EBITDA	3,832	4,362	3,119	22.9%	-12.2%	13,542	11,160	21.3%
Adjusted EBITDA	4,143	4,567	3,188	30.0%	-9.3%	15,248	11,715	30.2%
Adjusted EBITDA %	26.4%	31.4%	24.8%			27.4%	24.6%	
Adjusted EBITDA excl. other income	4,042	4,127	3,143	28.6%	-2.1%	14,685	11,436	28.4%
Adjusted EBITDA excl. other income %	25.8%	28.4%	24.5%			26.4%	24.1%	
Finance costs	298	302	429			1,271	1,851	
Depreciation and amortisation expenses	1,143	1,162	1,760			4,669	6,892	
Profit Before Tax	2,390	2,898	929	157.3%	-17.5%	7,602	2,417	214.6%
Tax Expenses	564	729	127			2,211	134	
Reported Profit After Tax	1,826	2,169	802	127.6%	-15.8%	5,391	2,283	136.2%
EPS	0.39	0.46	0.19	108.5%	-15.8%	1.17	0.53	119.3%
Adjusted PAT	2,398	2,626	1,651	45.2%	-8.7%	8,107	5,896	37.5%
Adjusted PAT %	15.3%	18.1%	12.9%			14.6%	12.4%	
Adjusted EPS (Basic and Diluted) (Rs)	0.51	0.56	0.39	33.0%	-8.7%	1.76	1.38	27.7%

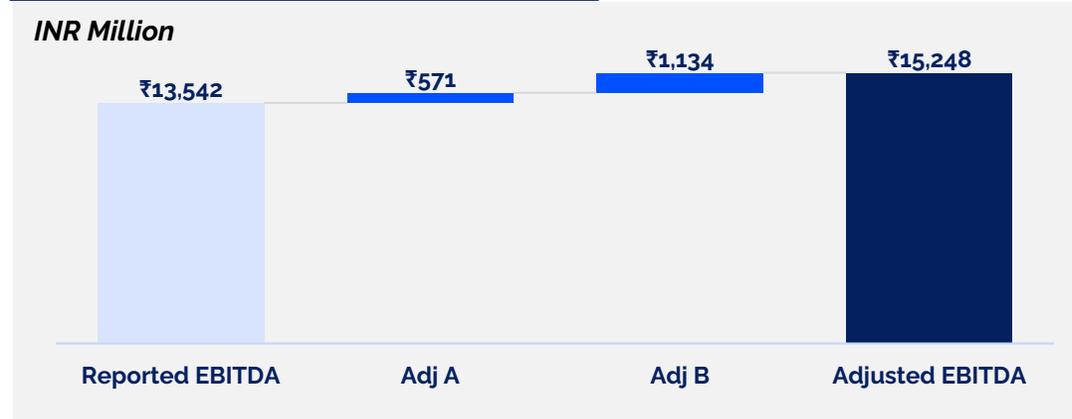
- ❖ Q4'25 Organic Revenue at INR 14,929 Mn (YoY% 16.3% and QoQ% 2.7%)
- ❖ FY'25 Organic Revenue at INR 54,943 Mn (YoY% 15.6%)
- ❖ Q4 Adj. EBITDA margin (excl. OI) is lower than Q3 due to (a) Change in revenue mix as BroadPath is onshore (b) Salary hikes made effective from Jan 25
- ❖ Dip in Q4 Reported EBITDA margins due to above and lower other income and earnout for BroadPath
- ❖ Finance cost include interest cost on long-term borrowing from promoter and interest expenses on lease liabilities

Adjustments on EBITDA and PAT

Adj EBITDA Bridge: Q4 FY25



Adj EBITDA Bridge: FY25



Adj PAT Bridge: Q4 FY25



Adj PAT Bridge: FY25



Adj A - Earnouts under acquisition agreements and for PAT it is adjusted for tax

Adj B - Share based payment awards (non cash expenses for the company and not tax deductible)

Adj C - Intangible assets Amortization is amortization of intangible assets acquired pursuant to carveout of healthcare business from the seller

Go Forward Positions

Amt in INR M

Particulars	FY'25	FY'26	FY'27	FY'28	FY'29
Closing Debt position	8,020	5,670			
Debt Repayment	2,490	2,350	5,670		
Interest Payment	751	535	285		
Share based Payment awards	1,134	250	146	78	40
Earnouts Cost - DCI / Birch/ BroadPath	571	494	5		
Intangibles Amortisation	1,588	1,795	1,785	1,771	1,698

- Numbers are based on the current visibility of management and are subject to change. Factors such as new loans, acquisitions, foreign exchange rate or changes in our share-based payment award plan could impact the final figures
- Intangible Amortisation include amortization of intangible assets acquired pursuant to business combinations (includes DCI, Birch and BroadPath)

Balance Sheet as on 31st Mar'25

<i>Amt in INR M</i>		
Particulars	Mar'25	Mar'24
Property, plant and equipment	3,699	3,832
Capital-work-in-progress	0	57
Right-of-use assets	5,521	5,665
Goodwill	60,390	57,096
Other intangible assets	20,362	20,078
Trade receivables and Unbilled	12,668	11,813
Cash and cash equivalents	3,438	3,441
Deferred tax assets (net)	1,337	1,354
Other Assets	3,091	3,305
Total Assets	110,507	106,642
Equity	83,361	64,431
Borrowings	8,170	19,335
Lease liabilities	5,850	5,982
Trade payables	2,136	2,593
Other financial liabilities	3,059	6,587
Deferred tax liabilities (net)	4,279	4,710
Other Liabilities	3,653	3,004
Total Liabilities	110,507	106,642

- ❖ Increase in Goodwill and Intangible driven by BroadPath acquisition
- ❖ Intangibles of \$16.5M created as a result of BroadPath acquisition
- ❖ DSO (excl. BroadPath) of 79 days in Mar'25 against 85 days in Mar'24.
- ❖ Borrowings (Promoter Debt) reduction due to conversion of loan into equity (in May'24) and repayment of debt.
- ❖ Reduction in Other financial liabilities pertains to pending purchase consideration paid towards for healthcare business carveout in Jan 22

Cash Flow – FY25

Amt in INR M

Particulars	FY'25	FY'24
Profit before tax for the period/ year	7,602	2,417
Adjustment for Non-Operating and Non-Cash items	6,982	8,693
Adjustment for working capital	(710)	(114)
Income taxes paid (net of refunds)	(1,734)	(1,263)
Net cash flows generated from operating activities (A) - OCF	12,141	9,733
Addition to Fixed Assets	(1,244)	(1,827)
Free Cash flow (FCF)	10,896	7,905
Cash paid for M&A (BroadPath)	(4,825)	(3,010)
Pending Purchase consideration paid for healthcare business carveout	(3,756)	
Others*	184	147
Net cash flows (used in) investing activities (B)	(9,642)	(4,691)
Capital infused by promoter	3,708	0
IPO expense reimbursed	72	(72)
Repayment of borrowings and lease liabilities	(5,021)	(5,546)
Interest paid on borrowings and lease liabilities	(1,320)	(1,896)
Net cash flows (used in) financing activities (C)	(2,561)	(7,513)
Net increase/ (decrease) in cash and cash equivalents (A+B+C)	(62)	(2,471)
Cash and cash equivalents at the beginning of the year/period	3,441	5,853
Effect of movement in exchange rates on cash and cash equivalents	58	60
Cash and cash equivalents at the end of the year/ period	3,438	3,441
Net cash flows generated from operating activities % (OCF on Reported EBITDA)	89.7%	87.2%
Free Cash flow % (FCF on EBITDA)	80.5%	70.8%

❖ Non-Cash/Non-Operating Items includes Depreciation, Interest expenses, SAR, Unrealized Fx loss and Interest income

❖ Others include Proceeds from sale of fixed assets, Interest income and Proceeds from maturity of derivative assets/liabilities, (net)

A photograph of three business professionals (two women and one man) smiling and looking at a laptop screen. The image is overlaid with a semi-transparent blue filter and geometric shapes like circles and triangles. The text "Thank You" is centered in white.

Thank You