



INVESTOR PRESENTATION

May 2026

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Company Overview

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Solution Portfolio

3

Key Opportunities and Growth Strategy

4

Financials – FY26

India's leading provider of end-to-end Electronics System Design and Manufacturing solutions



Key highlights

Well-Established Presence Across High-Growth Sectors: Defense, Aerospace & Space and EMS

1

Strong Experience and Capabilities

- Over 30 Years of Expertise in Providing **End-to-End Solutions** for the Electronics Sector
- ~1,900 Employees, including ~ 600 Design Engineers

2

Global Market Presence

- 50-55% Revenues from overseas customers in advanced economies

3

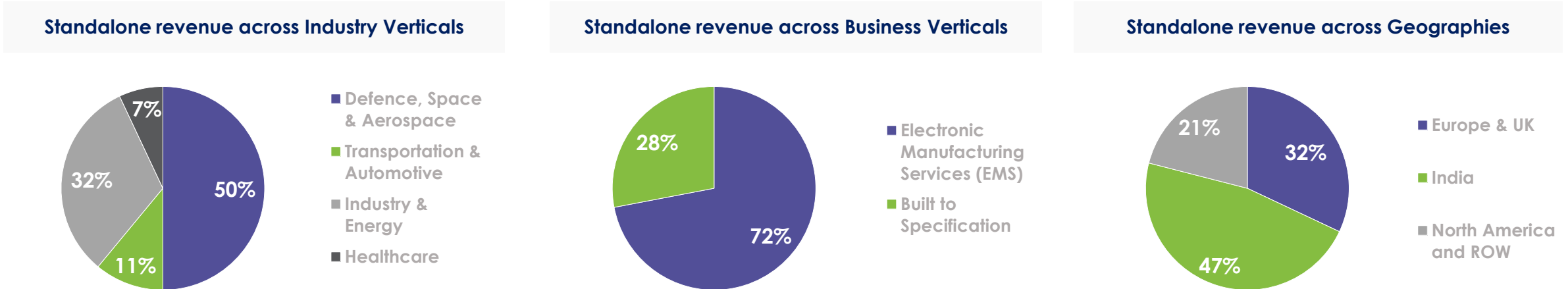
Innovation & Execution Excellence

- Powered by Innovation: **17 Patents, 125+ Publications**
- End-to-End Product Realization Capabilities, from Concept to Commissioning
- Strong Supply Chain Network with 600+ Suppliers

4

Leadership & Governance

- Robust leadership structure, with visionary promoters and seasoned professionals
- Strong corporate governance framework, anchored in transparency, accountability, and ethical leadership



As per FY26

Competitive advantage: innovation-led and customer-focused; uniquely positioned in sectors with high entry barriers



Diversified Portfolio in High Growth Sectors

- Diversified Growth Engines – Electronics Manufacturing Services (EMS) and Build-to-Specification (BTS) with a strategic focus on both Indigenization and Export Orientation
- Robust demand across sectors and enabled by favorable regulatory & policy environment in India

Deep Expertise and Track Record in Hi-Tech Sectors with High Entry Barriers

- Well established presence and certifications in high-tech sectors like Aerospace, Defense, and Space with high entry barriers; Long-standing partnerships with Global Hi-Tech OEMs with significant headroom for growth
- Recipient of several prestigious awards, including DRDO's Defense Technology Absorption Award, for pioneering work in indigenizing critical defense space technologies.

Long Standing Relationships with Marquee Customers

- Average 10-15 year relationships with our Top Customer groups | Single-source supplier, for ~80% of its manufactured products
- Strong relationships with Marquee Global Customers across Aerospace & Defense, Transportation, Automotive, Industrial & Energy, and Healthcare segments.

Global Presence & End-To-End Solution

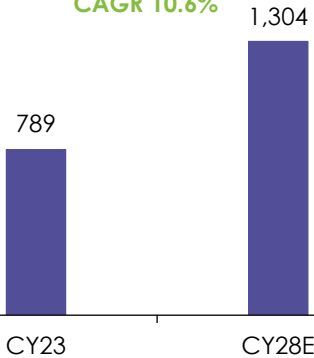
- Multiple design centers strategically located world-wide and manufacturing facilities equipped with advanced infrastructure. Well-positioned to effectively support our global customer base
- End-to-End capabilities across Design-Manufacturing-Testing value chain, and niche Micro-electronics capabilities enable Centum to provide integrated solutions for complex requirements
- Innovation Led businesses, with 17 Patents and 125+ publications. Multidisciplinary capabilities across RF, Digital, Power, and Software

Diversified portfolio in high growth sectors: driving indigenization with a strong export orientation

EMS Market

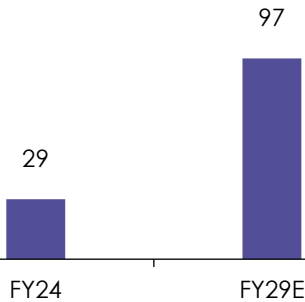
Global EMS Market (USD Bn)

CAGR 10.6%



Indian EMS Market (USD Bn)

CAGR 27.4%



The Global EMS Market is expected to grow from USD 789 Bn in CY23 to reach USD 1,304 Bn by CY28

India contributes to 3.8% of Global EMS market (CY23), expected to go up to 7.7% by CY28

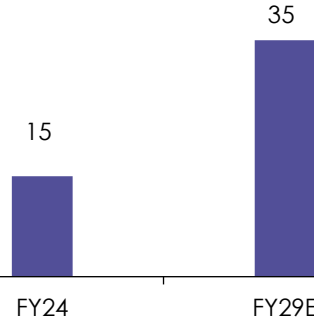
Growth Drivers

- ✓ Make In India
- ✓ Rapid expansion of Mobile Phone and Consumer Electronics segments driving overall market growth
- ✓ Govt schemes to incentivise domestic mfg. and investments. (like PLI*, DLI*, etc.)
- ✓ Cost-competitive workforce
- ✓ Favorable geopolitical positioning

India Built to Spec (Defence & Space)

India's Defence Production (USD Bn)

CAGR 18.7%



India's Defence Exports (USD Bn)

CAGR 18.9%



Growth Drivers

Defence:

- ✓ Make in India – indigenization in defence manufacturing
- ✓ Demand for advanced technology systems and next-generation capabilities
- ✓ Prioritization of Domestic Procurement in DAP* & fostering defence exports to make India a global defence supplier.
- ✓ Modernization of armed forces

Space:

- ✓ Rapid advancements in space technology are fueling growth in commercial, military, scientific exploration.
- ✓ India's share in the global space economy is projected to increase from 2% in FY24 to 8% by FY33

EMS Business Highlights	• FY26 Revenue growth of 21% YoY, driven by successful ramp-up and deliveries for a global semiconductor equipment OEM, and new order wins in Defence exports • 80+ successful NPIs supporting new business wins and faster ramp-ups • New business wins from Industrial customers for electrification and grid automation • Continuous investments augmenting capabilities and capacity, including installation of new lines
BTS Business Highlights	• FY26 Revenue growth of 37% YoY, driven by strong execution across key programs • Order book +28% YoY driven by strong momentum and strategic value-chain progression to Systems • Won a marquee AESA Radar order from HAL for the UHM platform (₹570+ Cr for the full program) • Received second complete Radar System order for Satellite and Space debris tracking • Complex test systems for aerospace & defence applications
Portfolio Optimization	• Decisive strategic actions initiated to exit overseas subsidiaries, sharpening focus on core high-growth businesses
Key Recognition	• “SAMAR Maturity Level 5 (highest level) certified” joining the ranks of very few Indian companies – enabling participation in defence tenders for safety-critical, mission-critical, and non-critical projects • Awarded the “Committed” badge on EcoVadis, a globally recognised independent ESG rating platform, reflecting our sustainability performance

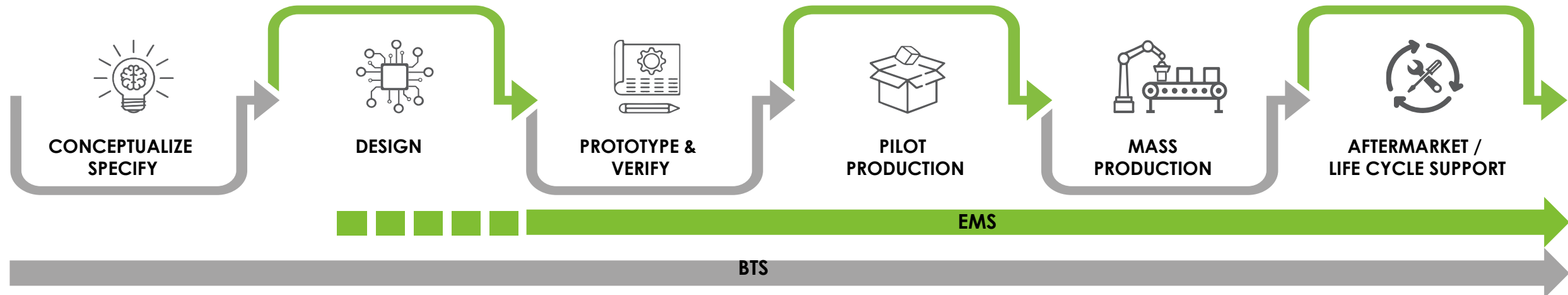
End-to-End solutions: optimized for high-complexity and high-reliability applications

EMS

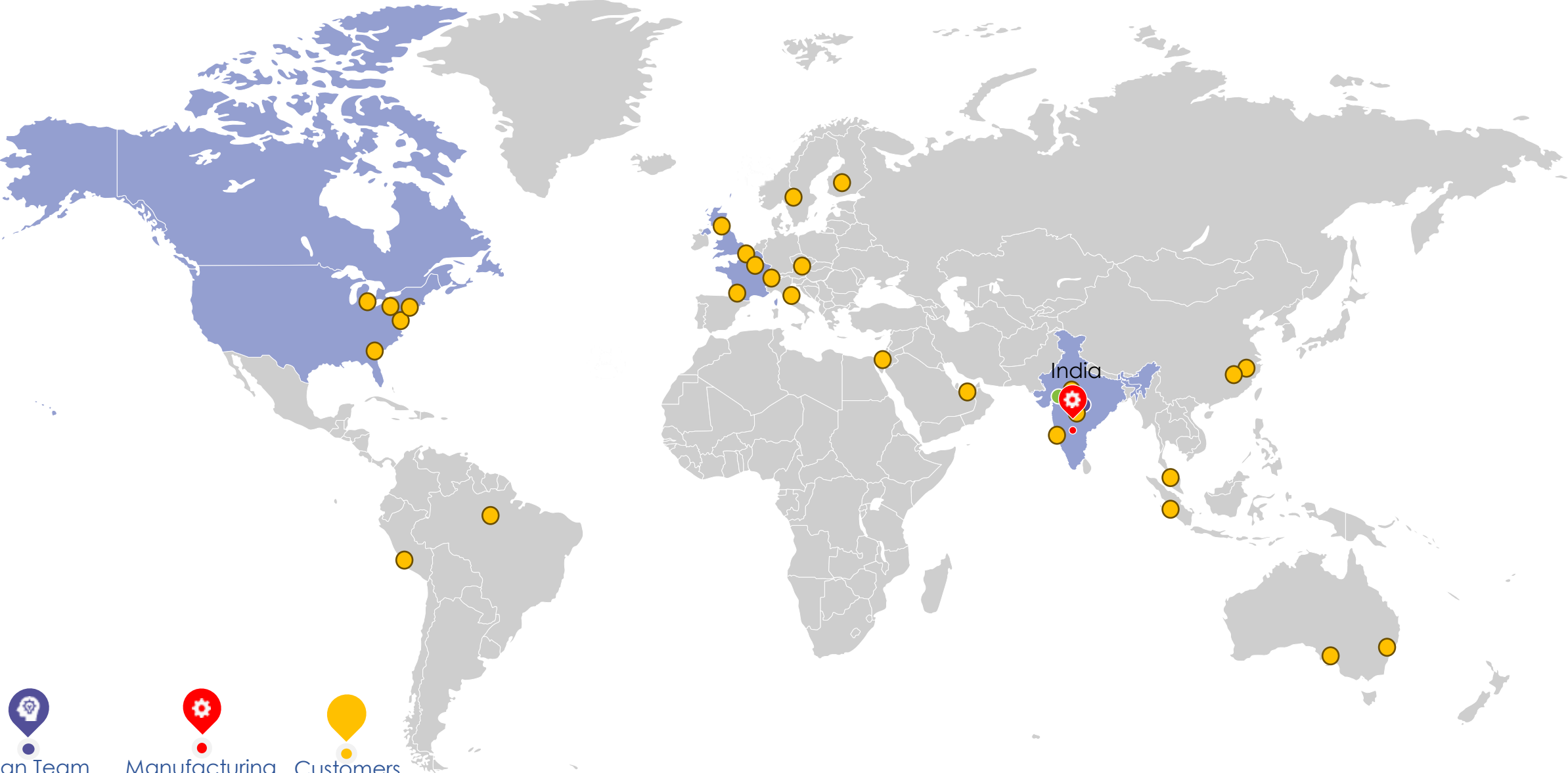
- ✓ EMS services include manufacturing high reliability, high complexity products in the high technology vertical ranging from printed circuit board assemblies to complex box builds, Line Replaceable Units (LRU) and full system integration
- ✓ **Client centric approach** to meet every requirement and help customers achieve their goals of lower TCO* and reduced time-to-market

BTS

- ✓ The Built to Specification services include taking a project **from conceptualization to mass production**
- ✓ Convenience of a **single point of contact** reducing time-to-market, minimize TCO and streamline project interfaces
- ✓ Maximize **IP value** to deliver innovative solutions fostering long-term partnerships, enhancing customer value and generating sustainable business growth



Global presence: designed to support high-tech development with customer proximity





APPARAO V MALLAVARAPU – *Chairman and Managing Director*

Mr. Apparao (Rao) V Mallavarapu founded Centum Electronics in the year 1993. Under his able leadership Centum has grown to become one of the largest electronics companies in India. He has initiated and successfully managed joint ventures with several MNCs. Rao received his Bachelor's degree in Mechanical Engineering from Bangalore University and a Master's Degree from Daltech University in Canada. Rao has been honored with the prestigious Chevalier de l'Ordre national du Mérite from France and the honorific 'Order of Rio Branco' by the Brazilian Government. Rao is currently the Chairman of CII National Committee on Space and is also on the Board of Advisors of New Zealand Trade and Enterprise.



NIKHIL MALLAVARAPU – *Joint Managing Director*

Mr. Nikhil has been associated with the Centum Company since August 2012. He is currently serving as Joint Managing Director. Prior to this he has served in various leadership positions including Manager- New Projects at SEBU, Vice President – Corporate Development at Centum Adetel and most recently as President- EMS BU. Prior to joining Centum, Nikhil worked at the multinational semiconductor company- Analog Devices, as product engineer in the MEMS sensors division. Nikhil completed his Masters and Bachelor's Degrees in Electrical and Computer Engineering from Carnegie Mellon University, USA. He also holds an MBA from the INSEAD Business School in France.



APURVA CHANDRA – *Independent Director*

Mr. Apurva Chandra is a former Indian Administrative Service (IAS) officer of the 1988 Maharashtra cadre with over 36 years of experience in public administration and policy formulation. He has served as Secretary in the Ministries of Health & Family Welfare, Information & Broadcasting, and Labour & Employment, and has held key positions in the Ministry of Defence and the Government of Maharashtra. He currently serves on the Boards of several reputed companies and is an alumnus of IIT Delhi and the London School of Economics.



KAVITHA DUTT CHITTURI – *Independent Director*

Mrs. Kavitha Dutt Chitturi is the Joint Managing Director at KCP Ltd., a diversified company involved in the manufacture of Cement, Heavy Industrial Machinery for Sugar plants, steel and sophisticated high-tech equipment for Defence, Space & Nuclear Projects. Kavitha was Chairperson FICCI, Tamil Nadu State Council. Kavitha is a Business Management Graduate from Cedar Crest College, Pennsylvania, USA



TANYA MALLAVARAPU – *Non-Executive Director*

Ms. Tanya is the founder of TMR Design Co. LLP, an interdisciplinary design firm that emphasizes innovation, creativity, and functionality in a wide array of industries from healthcare, residential, commercial, and hospitality. Tanya completed her Master's Degree in Economics from Duke University, in the U.S. She graduated from the University of Southern California with a Bachelor's Degree in Business Administration and was on the Dean's List.



DR. UDAYANT MALHOUTRA – *Independent Director*

Dr. Udayant is the CEO & Managing Director of Dynamatic Technologies Limited, a world-class design, engineering and manufacturing company which designs and builds highly engineered products for Hydraulic, Automotive, Aeronautic and Security applications. He is a member of CII National Council and Chairs the CII National Committee on Design. He has also served on the Board of Governors, IIT Kanpur



TARUN SAWHNEY – *Independent Director*

Mr. Tarun is the Vice Chairman & Managing Director of Triveni Engineering & Industries Ltd (TEIL). TEIL is one of the largest fully integrated sugar, bioenergy, and ethanol manufacturers in India. The Company is also a leader in industrial gearboxes, naval defence solutions, and water treatment projects. Tarun is an MBA from The Wharton School of the University of Pennsylvania (USA) and holds a Master's degree from Emmanuel College, University of Cambridge (UK)



RAMESH RAMADURAI – *Independent Director*

Mr. Ramesh Ramadurai is a seasoned business leader with over 30 years of experience at 3M, bringing strong global and cross-cultural leadership expertise. He has lived and worked in the US, the Philippines, and China, and led 3M's Industrial Business across Asia Pacific during his assignment in China (2014–2019). He has served as Managing Director of 3M India. He holds a Bachelor's degree in Chemical Engineering from IIT Kanpur and an MBA from IIM Calcutta, and has held leadership roles within CII and the US-India Business Council.

Experienced leadership team with deep domain expertise



DR. VINOD CHIPPALKATTI, PhD – *Chief Technology Officer*
Dr. Vinod Chippalkatti leads Centum's Build-to-Spec India business, delivering mission-critical solutions for satellites, launch vehicles, radars, missiles, and other strategic platforms. With over 25 years at Centum, he has held multiple leadership roles, including heading the design and engineering function. Prior to Centum, Dr. Chippalkatti spent a decade at ISRO, contributing to India's first series of communication satellites. He holds a BE (EEE) from NITK Suratkal, a Master's in Engineering from IISc Bangalore, a PhD, and a PG Diploma in IP Law from NLSIU, Bangalore. Dr. Chippalkatti is also a member of Executive Committee of Indian Space Association (ISPA)



JAGADISH SINGH – *President, EMS Business Unit*
Mr. Jagadish brings over 30 years of experience in the electronics manufacturing industry, with deep expertise in customer management, operations, sourcing, purchasing, and logistics. He has a strong track record of building efficient supply chains and supplier networks, alongside proven leadership in business development, sales, program management, and team building. Prior to joining Centum, he held key leadership roles at Orion Electronics (Hungary) and Rangsons, where he played a pivotal role in driving operational excellence and strategic growth.



VISHWANATH MUDEGOWDARA – *CEO, Centum T&S*
Mr. Vishwanath brings over 30 years of experience in end-to-end product development across hardware and firmware, with a strong focus on leveraging global delivery models, open innovation, technology alliances, and IP strategy to drive investor value and business growth. Prior to Centum, Vishwanath has held leadership positions in L&T Technology Services and Tata Consultancy Services. Vishwanath holds a Master's in Biomedical Instrumentation and a Bachelor's in Instrumentation Technology.



SUNDARARAJAN PARTHASARATHY – *Chief Financial Officer*
Mr. Sundar is a Strategic Finance & Operations leader with over 25 years of experience and proven track record in driving Financial Transformation, and turnaround strategies in large manufacturing and infrastructure corporates across multiple regions within and outside India. Prior to Centum, Sundar has held leadership positions in global organizations such as Adecco, GE, and Xylem, in addition to experience in Indian companies like TATAs, GE-Triveni, TVS group. Sundar is a Chartered Accountant

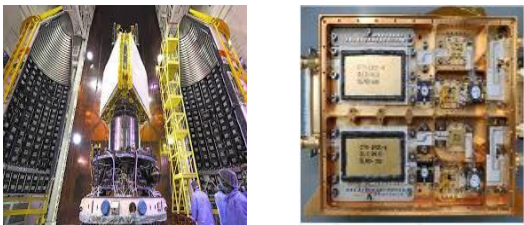
INDU H S – *Company Secretary, Chief Compliance Officer*
11+ years experience



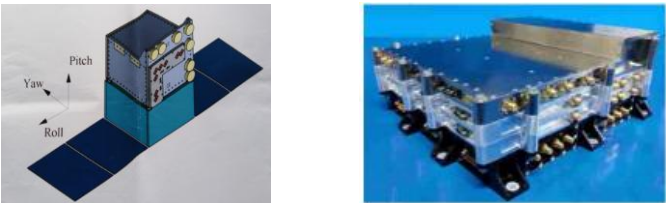
Solution portfolio

Space

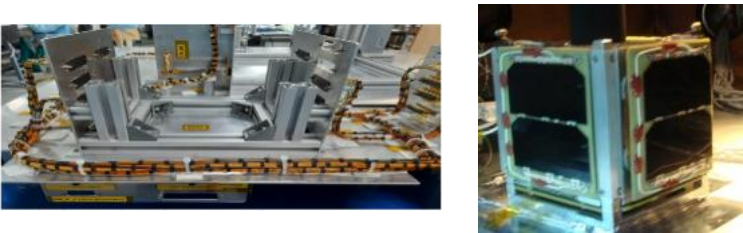
Earth Observation Satellite Subsystems



Electronic Warfare Payloads



Small Sat & Payload Integration



Defence

Missile Control & Guidance



Radar Subsystems



Tank Electronics



Railway

Public Address & Intercom

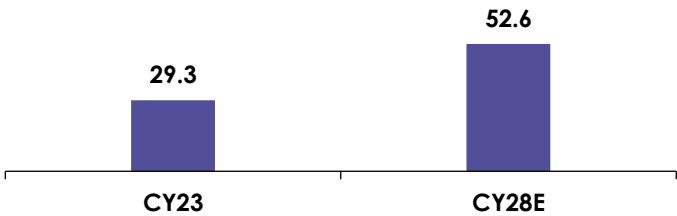


Passenger Information Systems



Global Passenger Information System Market (USD Bn)

CAGR 12.4%



- Passenger Information Systems will play a key role in enhancing operational efficiency and improving passenger experiences.

Electronics Manufacturing Services (EMS)



Manufacturing high reliability, high complexity products in the high technology vertical ranging from printed circuit board assemblies to complex box builds, Line Replaceable Units (LRU) and full system integration.



Industrial & Medical



Industrial Measurement & Control



Control Boards



Digital X-ray (Healthcare)



Communication Equipment (Power Grid)



Fertility Kit (Consumer Health)

Electric Mobility



Battery Management System (Electric 3-wheeler)



MK2 Encoder (Electric Commercial Vehicles)



HV Inverters PCBA (Electric Buses)

Defence & Aerospace



Air traffic Management Systems



Sonar Sub systems



Infrared Cameras for Defence vehicles



Electronics for Optronic Equipment

PCBA = Printed Circuit Board Assembly

Key Opportunities and Growth Strategy

Well established presence among **Global OEMs**, and Strategic Customers in domestic market with **significant headroom for growth**

Strategic Edge

Focus Areas

Key Actions

BTS (India)

At the forefront of **developing and localizing critical technologies** addressing domestic capability gaps.
Moving up the value chain by delivering **complete systems** for Defence and Strategic sectors

- Multi-function Radar and Radar subsystems
- Satellite Constellations for ISR applications
- Avionics, Radar, and EW system for fighter aircraft and helicopters
- T-90 Tank
- Payloads and electronics for communication and ISR for Drones

- Strategic collaborations
- **System-level expertise**
- Partnerships with global OEMs in Aerospace & Defence
- Partnerships with premier academic institutions (IITs, NITs, IISc)
- Collaborating with a dynamic network of startups

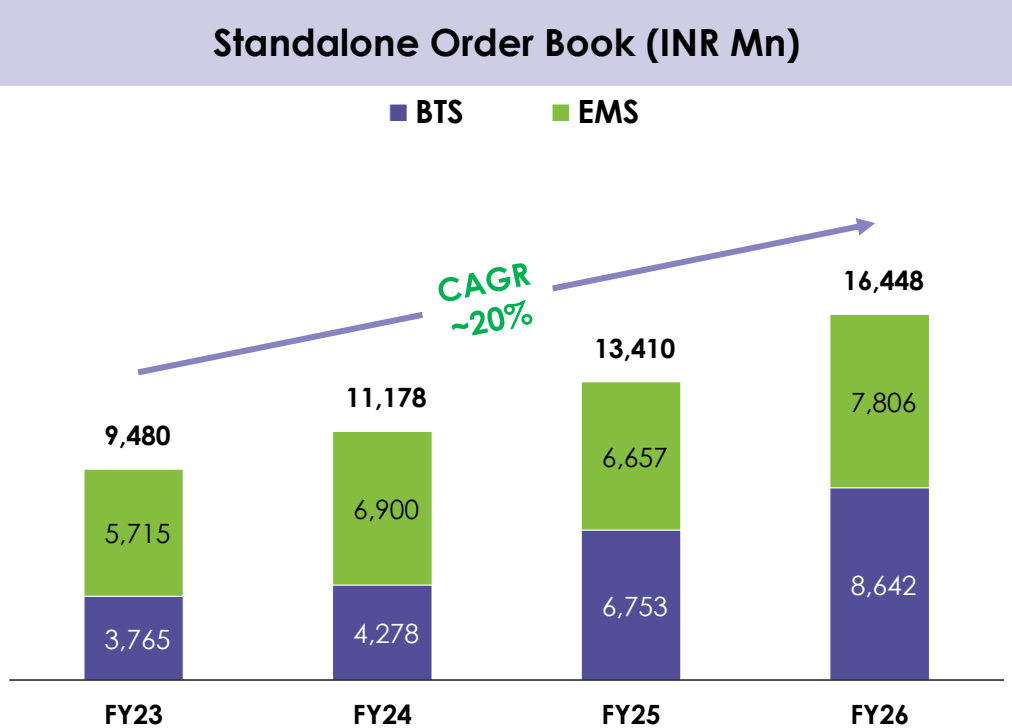
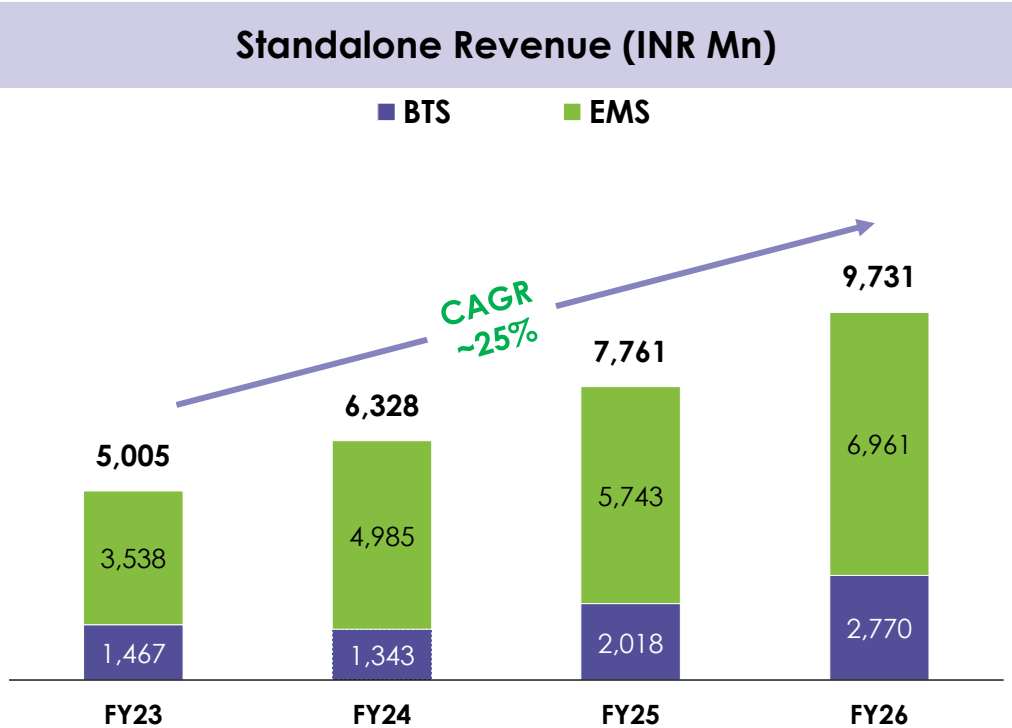
EMS

Proven expertise in delivering **high-reliability** and **high-complexity** products through agile, scalable, and integrated manufacturing solutions

- Make in India, China +1
- New Technology areas – Semiconductor Equipment, Security Systems
 - Energy & Industrial – Smart Energy, Automation
 - Automotive – EV / Battery Management Systems
 - Medical Devices – Point of Care diagnostics

- Focus on Make in India – increase presence in the domestic market
- AI-led solutions for Manufacturing, Industry 4.0
- Supply Chain excellence and Fulfillment

Financials



Historical Standalone Income Statement



Particulars (INR Mn)	FY23	FY24	FY25	FY26
Operational Revenue	5,006	6,328	7,761	9,731
Total Expenses	4,470	5,541	6,820	8,522
EBITDA	536	787	941	1,209
EBITDA Margins (%)	10.71%	12.44%	12.12%	12.42%
Other Income	47	67	66	158
Depreciation	162	184	195	195
Finance Cost	157	180	195	168
Profit/ (loss) before exceptional items and tax expense	264	490	617	1,004
Exceptional items	-	-	-	(2,033)
PBT	264	490	617	(1,029)
Tax	70	127	161	142
PAT	194	363	456	(1,171)
PAT Margins (%)	3.89%	5.74%	5.88%	(12.04)%
Other Comprehensive Income	6	3	2	6
Total Comprehensive Income	200	366	458	(1,165)
Diluted EPS (INR)	14.91	27.82	34.84	(79.32)

Standalone Balance Sheet

Particulars (INR Mn)	FY24	FY25	FY26
ASSETS			
Non-Current Assets	2,480	3,215	1,801
(a) Property, Plant & Equipment	1,053	1,046	1,337
(b) Capital Work in progress	3	76	-
(c) Goodwill	36	36	36
(d) Other Intangible Assets	18	8	4
(e) Right of use asset	23	25	21
(f) Intangible assets under development	-	-	-
(g) Financial Assets			
(i) Investments	1,081	1,538	-
(ii) Other financial assets	158	232	148
(h) Deferred tax assets (net)	89	189	194
(i) Non-current tax assets (net)	9	37	12
(j) Other non-current assets	10	28	49
Current Assets	5,748	7,990	9,258
(a) Inventories	2,874	3,274	4,568
(b) Financial Assets			
(i) Investments	-	-	-
(ii) Trade Receivables	2,203	3,171	3,073
(iii) Cash and Cash Equivalents	130	510	378
(iv) Bank balances other than above	235	619	822
(iv) Others current financial assets	29	3	37
(c) Other Current Assets	277	413	380
TOTAL ASSETS	8,228	11,205	11,059

Particulars (INR Mn)	FY24	FY25	FY26
EQUITY AND LIABILITIES			
Equity	3,124	5,585	4,315
(a) Share Capital	129	147	147
(b) Other Equity	2,995	5,438	4,168
Non Current Liabilities	735	131	69
(a) Financial Liabilities			
(i) Borrowings	103	78	22
(ii) Other Financial Liabilities	-	-	-
(iii) Lease Liabilities	3	2	9
(b) Government Grants	16	11	13
(c) Net non-current employee defined benefit liabilities	50	40	25
(d) Other Non-Current Liabilities	563	-	-
Current Liabilities	4,369	5,489	6,675
(a) Financial Liabilities			
(i) Borrowings	1,068	883	1,198
(ii) Trade Payables	1,494	1,701	2,549
(iii) Other Financial Liabilities	159	302	298
(iv) Lease Liabilities	2	11	6
(b) Government Grants	8	6	7
(c) Other current Liabilities	1,501	2,285	2,411
(d) Net current employee defined benefit liabilities	8	8	11
(e) Provisions	81	158	131
(f) Liabilities for current tax (net)	48	135	64
TOTAL EQUITY AND LIABILITIES	8,228	11,205	11,059

Historical Consolidated Income Statement

Particulars (INR Mn)	FY23	FY24	FY25	FY26
Operational Revenue	9,230	10,908	7,403	9,527
Total Expenses	8,468	10,049	6,413	8,173
EBITDA	762	859	990	1,354
EBITDA Margins (%)	8.26%	7.87%	13.37%	14.22%
Other Income	59	68	65	158
Depreciation	438	453	195	195
Finance Cost	273	346	195	169
Share of profit / (losses) of associates and JV from continuing operation	12	-	-	-
Profit/ (loss) before exceptional items and tax expense from continuing operations	121	128	665	1,148
Exceptional Item	-	(49)	-	-
Profit/ (loss) before tax from continuing operations	121	79	665	1,148
Tax	54	107	161	141
Profit/ (loss) after tax from continuing operations	67	(28)	504	1,007
(Loss)/ profit before tax from discontinued operations	-	-	(523)	(1,525)
PAT	67	(28)	(19)	(518)
PAT Margins (%)	0.73%	(0.26)%	(0.26)%	(5.43)%
Other Comprehensive Income	7	23	9	(69)
Total Comprehensive Income	74	(5)	(10)	(587)
Diluted EPS from continuing operations (INR)	7.55	1.36	38.49	68.19

Consolidated Balance Sheet



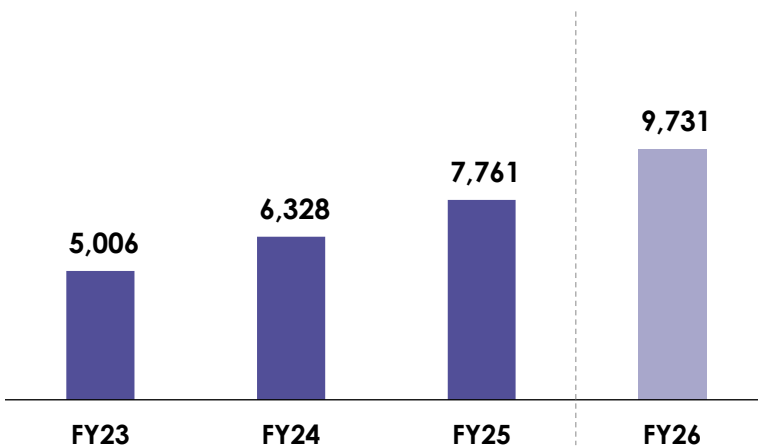
Particulars (INR Mn)	FY24	FY25	FY26
ASSETS			
(1) Non-current assets	3,038	3,025	1,801
(a) Property, Plant and Equipment	1,126	1,096	1,337
(b) Capital work-in-progress	3	76	-
(c) Goodwill	413	413	36
(d) Other Intangible assets	314	238	4
(e) Right of use asset	530	428	-
(f) Intangible assets under development	101	74	21
(g) Financial assets			
(i) Investment in joint ventures and associates	84	-	-
(ii) Other Investments	1	1	-
(iii) Other non current financial assets	276	343	148
(h) Deferred tax assets (net)	102	189	194
(i) Non-current tax assets (net)	13	37	12
(j) Other non-current assets	75	130	49
(2) Current assets	7,600	9,369	9,142
(a) Inventories	3,174	3,474	4,562
(b) Financial assets			
(i) Trade receivables	2,280	3,065	2,997
(ii) Cash and cash equivalents	481	678	379
(iii) Bank balances other than cash and cash equivalents	235	619	822
(iv) Other current financial assets	441	463	37
(c) Other current assets	989	1,070	345
(3) Asset held for Sale	-	-	2,084
Total assets (1+2+3)	10,638	12,394	13,027

Particulars (INR Mn)	FY24	FY25	FY26
EQUITY AND LIABILITIES			
(1) Equity	1,967	3,942	3,251
(a) Equity share capital	129	147	147
(b) Other equity	1,904	3,905	3,285
Equity attributable to equity holders of the parent (a+b)	2,033	4,052	3,432
(c) Non-controlling interests	(66)	(110)	(181)
(2) Non-current liabilities	1,616	600	69
(a) Financial liabilities			
(i) Borrowings	447	213	22
(iii) Lease Liabilities	408	318	9
(b) Deferred tax liabilities (net)	5	-	-
(c) Net non-current employee defined benefit liabilities	53	40	25
(d) Other non-current liabilities	672	8	-
(e) Provisions	15	10	-
(f) Government Grants	16	11	13
(3) Current liabilities	7,055	7,852	6,655
(a) Financial liabilities			
(i) Borrowings	1,446	1,235	1,198
(ii) Trade payables	2,222	2,200	2,530
(iii) Other current financial liabilities	372	436	298
(iv) Lease Liabilities	118	107	6
(b) Other current liabilities	2,517	3,353	2,410
(c) Government Grants	8	6	7
(d) Net employee defined benefit liabilities	8	8	11
(e) Provisions	313	372	131
(f) Liabilities for current tax (net)	51	135	64
(4) Liability directly associated with assets held for sale	-	-	3,052
Total equity and liabilities (1+2+3)	10,638	12,394	13,027

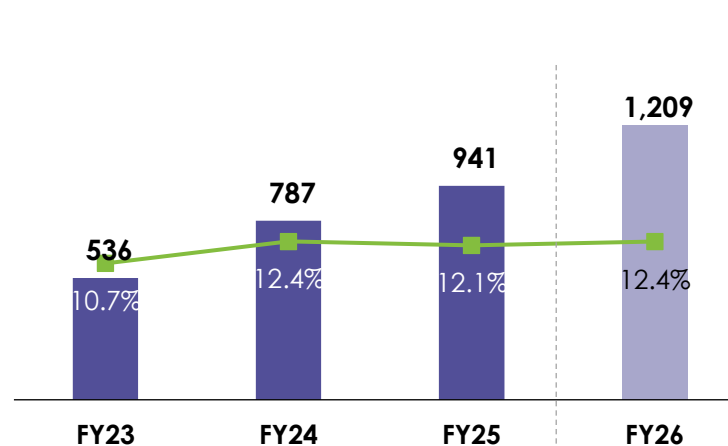
Financial Highlights | Standalone



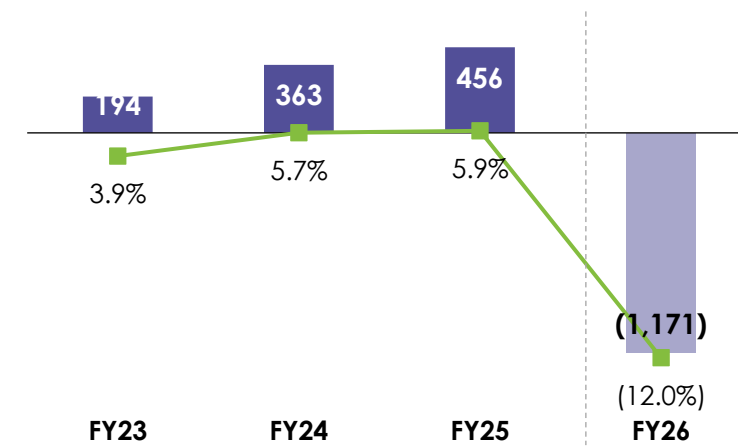
Operational Revenue (INR Mn)



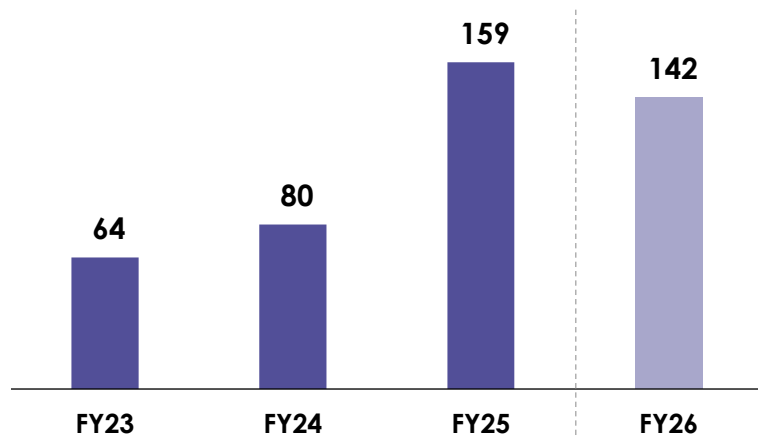
Adjusted EBITDA (INR Mn) & EBITDA Margins (%)



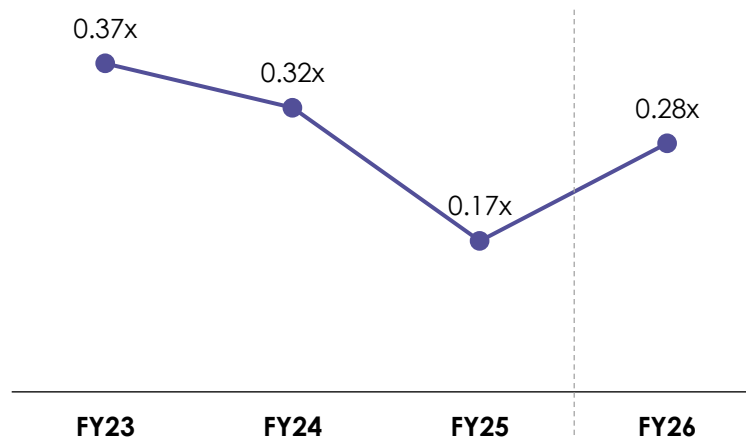
PAT *(INR Mn) & PAT Margins* (%)



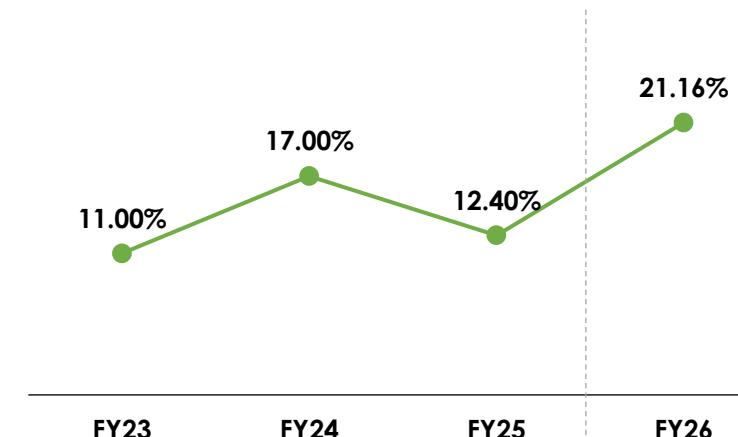
Adjusted Net Working Capital Days



Total Borrowings to Equity

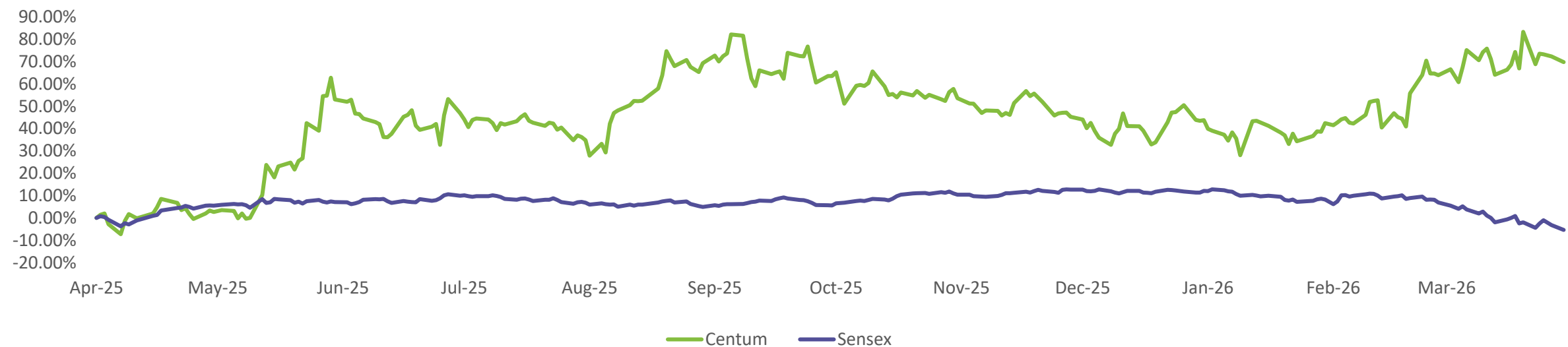


Adjusted ROCE



Adjusted EBITDA is the sum of Profit/ (loss) after tax plus Total tax expenses plus Depreciation and amortisation expenses plus Finance costs minus Other income minus Finance income minus Share of profit / (loss) of associates (net) plus Exceptional items (net)
Adjusted Working Capital Days is calculated as (Total current assets minus Total current liabilities which is adjusted by plus Current Financial liabilities - Borrowings) multiplied by number of days divided by Revenue from operations

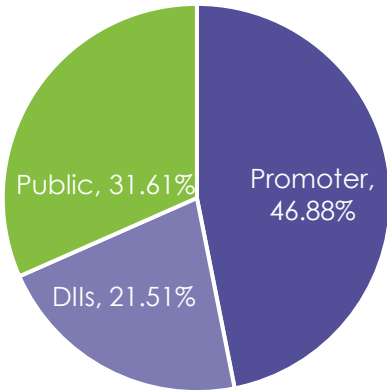
1 Year Stock Performance upto 31st March, 2026



Price Data (As on 31st March, 2026)

CMP	2,765.15
52 Week H/L	3,066.00/1,310.30
Avg. Vol. ('000)	59.35
Avg. turnover (Mn)	145.76
Market Capital (INR Mn)	40,747.67
Total outstanding shares (Mn)	14.74

Shareholding Pattern (As on 31st March, 2026)



Centum Electronics Limited

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