



# IntraSoft Technologies Limited



**Investor Presentation**  
**27<sup>th</sup> May, 2026**

**BSE: 533181, NSE: ISFT**



**123Stores**

**123Stores**

**E-Commerce Subsidiary of IntraSoft  
Technologies Limited**

# We are an Amazon Retailer

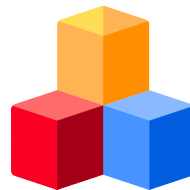
What we do?



Our value proposition



Products we sell



- ✓ We are amongst the top 300 e-commerce retailers on the Amazon US marketplace#
- ✓ We enable small and medium businesses (our brand partners) in the US to sell their products on Amazon
- ✓ We sell 150,000 + products across all major categories – home & kitchen, garden & outdoor, tools & more

Source(s): #Marketplace Pulse

# Our Business Model

*Our end-to-end solution enables brand partners to grow their business on Amazon without the need for dedicated resources*



# Our Platform Features



## **Our Journey**

**Our business underwent  
extensive transformation to  
emerge with a more robust,  
sustainable and resilient  
business model**

# Inventory Heavy Model upto FY22



Inventory Heavy Model had several challenges

- **Higher working capital requirements**
  - Inventory-heavy model requires significant capital to maintain stock levels, which lead to continuous increase in working capital requirement.
- **Risk of Inventory Mark down/Obsolescence/Change in trends**
  - Holding inventory increases the risk of items becoming outdated or obsolete, especially in industries driven by fast-changing trends.
  - Unanticipated shifts in consumer preferences can lead to significant markdowns.
- **Continuous Rise in Debt Levels**
  - Financing high working capital leads to rise in Debt levels, which increases the interest costs leading to a negative impact on the PAT margin
- **Difficult to Scale**
  - Inventory model requires significant capital requirement, leads to challenge in scaling and adding more products to the engine.

uptil  
2022

## FY22 to FY26 – Period of Transformation



- **Company focused on gradual shift towards Vendor Direct Model from Inventory Model**
  - Focus on selling entire **product catalogue** of brands including the Long tail products
  - Long tail products are **slow-moving & low volume** products
  - Shipped the products from **brand warehouses to consumers** - saving in shipping, storage & inventory holding costs
- **Reduction of Inventory level**
  - **As we transitioned** our focus towards Vendor Direct model, this led to reduction in inventory
- **Debt Repayment**
  - Shift from Inventory Model helped in **reduction in debt levels**, reducing the interest cost
- **Strong Focus on Technology ensuring Robust scalable systems**
  - Technology forms the bedrock of our offering – enabling us to service our brand partners and scale higher milestones. Our strong focus would ensure our future growth,

2022 - 2025

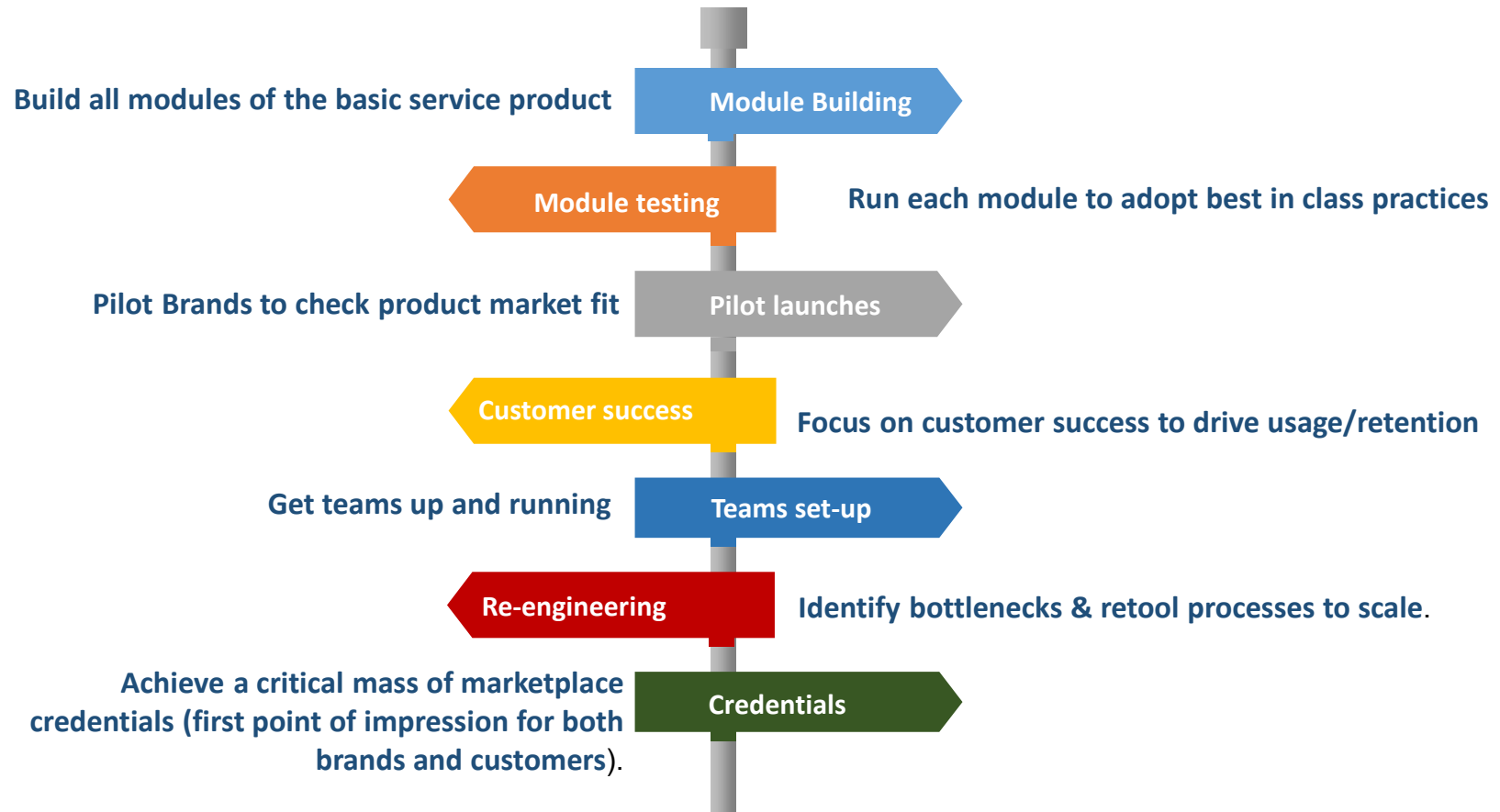
## FY26 Onwards - Emerging as a transformed company



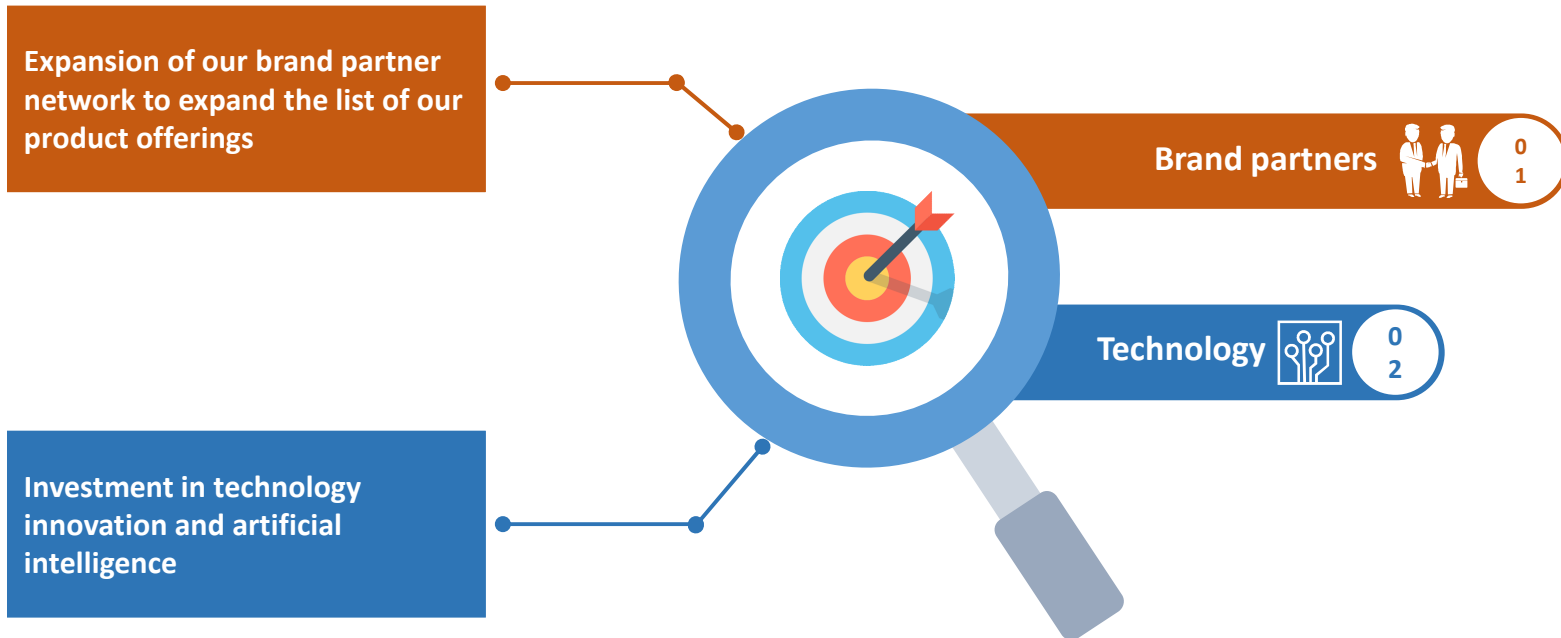
2026  
onwards

- **Accelerated shift to Vendor Direct Model**
  - Focus on selling entire **product catalogue** of brands including the Long tail products
  - Shipped the products from **brand warehouses to consumers** - saving in shipping, storage & inventory holding costs
  - Vendor Direct Model's Revenue as a percentage of Total Revenue to continuously increase
- **Limited Risk of Inventory Drawdown due to reduction in Reduction of Inventory level**
  - Focus on Vendor Direct Model would limit Inventory drawdown risk
- **Scalability to improve Significantly with increased reliance on Vendor Direct model**
  - Through our technology which has **the bandwidth, efficiency and robustness** to support this growth opportunity

## Our focus till date



# Key focus areas for future



# Brand partner expansion

Target

We aim to increase the breadth of our product offerings

From

150,000

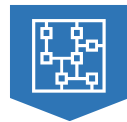
To

500,000

How we plan to achieve it?



Through *our technology* which has the *bandwidth, efficiency and robustness* to support this growth



*Grow our network of brand partners* and deepen relationships with them through investments in:



Maintaining and growing our sales teams



Training our sales team and equipping them with the necessary technology

## Investment in Technology



Technology forms the bedrock of our offering – enabling us to service our brand partners and scale higher milestones



We emphasize on our constant innovation and enhancing our products and platform offerings



We will continue to *invest in our technology* to enhance its:



Efficiency & speed of transactions



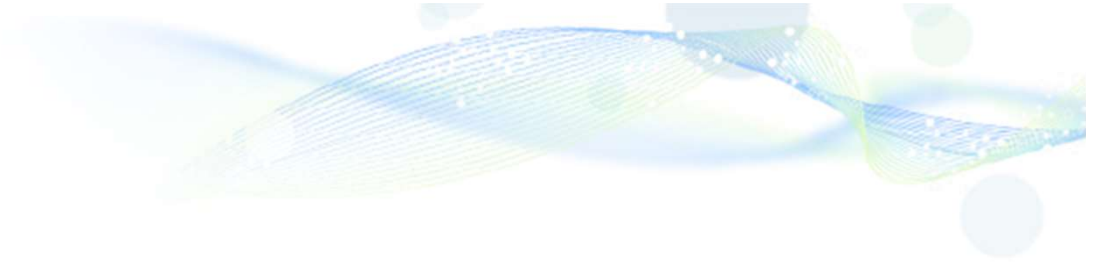
Bandwidth & scalability



Automation levels



Security



# Financial Performance of IntraSoft Technologies Limited



## Financial Performance – IntraSoft Technologies Limited

Audited Consolidated Statement of Profit & Loss				
Particulars	Quarter Ended		Year Ended	
	Mar-26	Mar-25	Mar-26	Mar-25
	₹ (In Lakhs)		₹ (In Lakhs)	
Revenue From Operations	13,604.74	13,004.00	53,421.98	50,719.37
Cost of Goods Sold	8,730.32	8,291.42	34,247.66	32,107.22
<b>Gross Profit</b>	<b>4,874.42</b>	<b>4,712.58</b>	<b>19,174.32</b>	<b>18,612.15</b>
Shipping and Handling Expenses	2,124.75	1,967.16	8,253.89	7,544.35
Sales & Marketing Expenses	2,037.74	1,962.86	7,957.27	7,554.11
Employee Benefit Expense	171.12	210.18	619.77	927.25
Other Expenses	139.79	207.16	665.11	829.95
<b>Earnings From Operations</b>	<b>401.02</b>	<b>365.22</b>	<b>1,678.28</b>	<b>1,756.49</b>
Other Income (Net)	22.68	12.30	39.63	141.13
<b>Earnings Before Interest, Tax, Depreciation &amp; Amortization</b>	<b>423.70</b>	<b>377.52</b>	<b>1,717.91</b>	<b>1,897.62</b>
Depreciation & Amortization	16.12	18.39	68.42	85.38
<b>Earnings Before Interest &amp; Tax</b>	<b>407.58</b>	<b>359.13</b>	<b>1,649.49</b>	<b>1,812.24</b>
Finance Costs	31.37	31.87	115.22	255.55
<b>Profit Before Tax (PBT)</b>	<b>376.21</b>	<b>327.26</b>	<b>1,534.27</b>	<b>1,556.69</b>
Tax Expense	61.28	92.04	206.57	288.19
<b>Profit After Tax (PAT)</b>	<b>314.93</b>	<b>235.22</b>	<b>1,327.70</b>	<b>1,268.50</b>



**IntraSoft Technologies Limited**

**For Further Information, Please Contact**

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**Company :**

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IntraSoft Technologies Limited  
CIN: L24133MH1996PLC197857

[www.itlindia.com](http://www.itlindia.com)

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