IntraSoft Technologies Limited

Investor Presentation
13th November, 2025

BSE: 533181, NSE: ISFT

IntraSoft

123Stores

123Stores

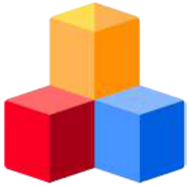
E-Commerce Subsidiary of IntraSoft Technologies Limited

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

amazon

Premium seller on Amazon US with 96% Life-time rating

Customers

We service millions of marketplace customers

Brand Partners

We have a wide network of 300+ brand partners

Logistics Partners

We have partnered with leading logistic companies – UPS and Fedex for fast and accurate order fulfillment

Our Platform Features

Our Journey

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

Inventory Heavy Model uptil FY22

uptil 2022

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    - Holding inventory increases the risk of items becoming outdated or obsolete, especially in industries driven by fast-changing trends.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.

FY22 to FY25 – Period of Transformation

2022 - 2025

- **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,

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

Build all modules of the basic service product

Run each module to adopt best in class practices

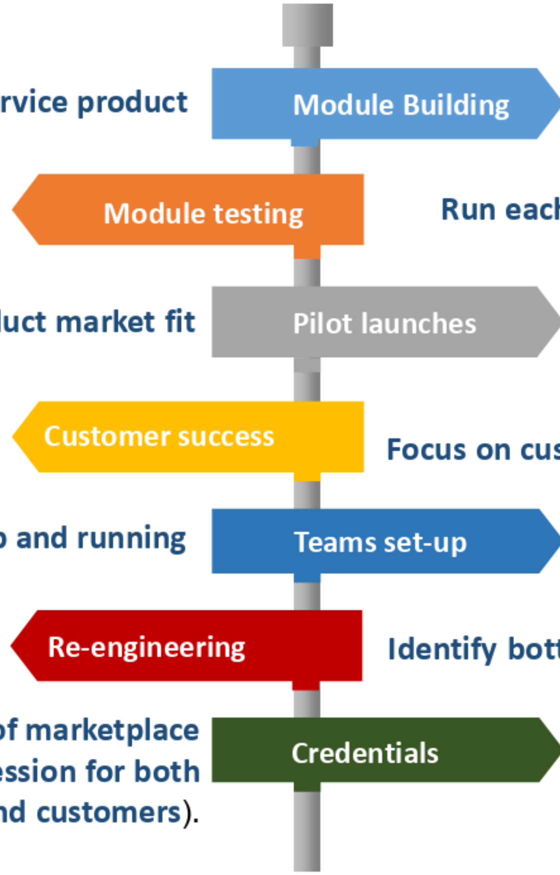
Pilot Brands to check product market fit

Focus on customer success to drive usage/retention

Get teams up and running

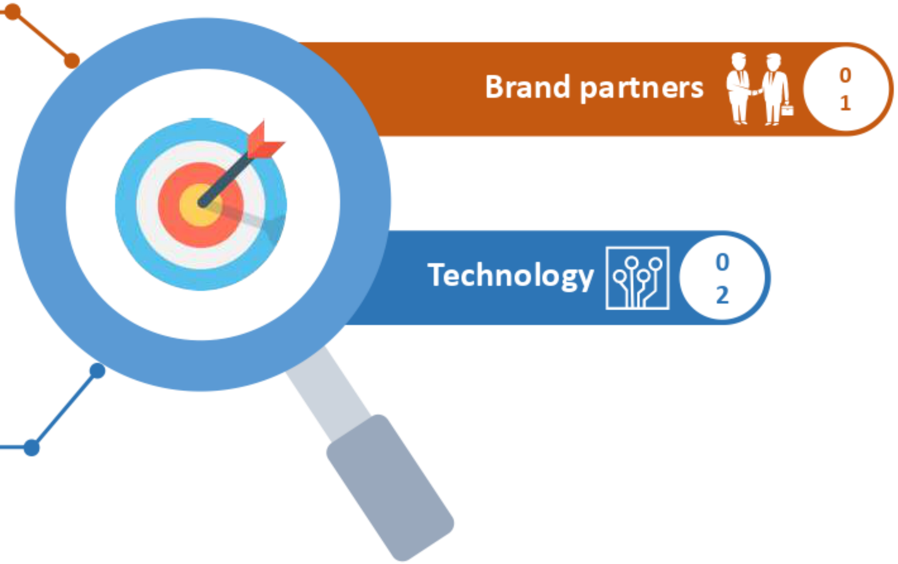
Identify bottlenecks & retool processes to scale.

Achieve a critical mass of marketplace credentials (first point of impression for both brands and customers).



Key focus areas for future

Expansion of our brand partner network to expand the list of our product offerings



Investment in technology innovation and artificial intelligence

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		
	Quarter Ended	
Particulars	**Sept-25**	**Sept-24**
	₹ (In Lakhs)	
Revenue From Operations	13,251.45	12,557.31
Cost of Goods Sold	8,505.64	7,935.75
Gross Profit	**4,745.81**	**4,621.56**
Shipping and Handling Expenses	2,042.98	1,858.35
Sales & Marketing Expenses	1,967.24	1,867.48
Employee Benefit Expense	148.73	234.54
Other Expenses	181.80	201.49
Earnings From Operations	**405.06**	**459.70**
Other Income (Net)	5.83	59.68
Earnings Before Interest, Tax, Depreciation & Amortization	**410.89**	**519.38**
Depreciation & Amortization	17.54	21.39
Earnings Before Interest & Tax	**393.35**	**497.99**
Finance Costs	24.56	31.69
Profit Before Tax (PBT)	**368.79**	**466.30**
Tax Expense	27.58	74.61
Profit After Tax (PAT)	**341.21**	**391.69**

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