

IntraSoft Technologies Limited



Investor Presentation
12th February, 2026

BSE: 533181, NSE: ISFT



123Stores

123Stores

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

We are an Amazon Retailer

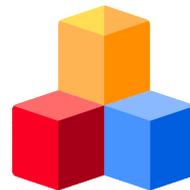
What we do?



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 - Holding inventory increases the risk of items becoming outdated or obsolete, especially in industries driven by fast-changing trends.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 FY25 – 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

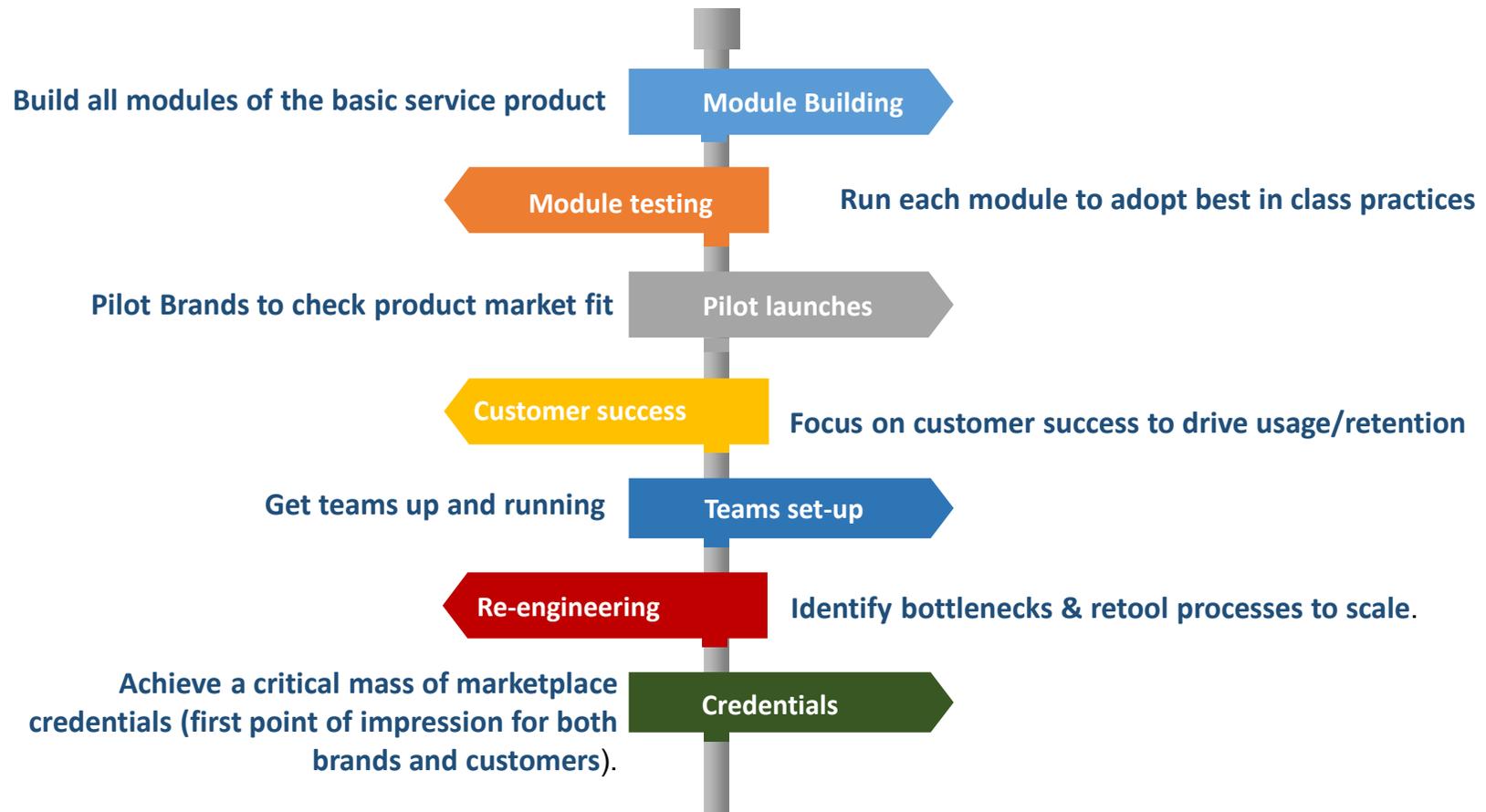
FY26 Onwards - Emerging as a transformed company



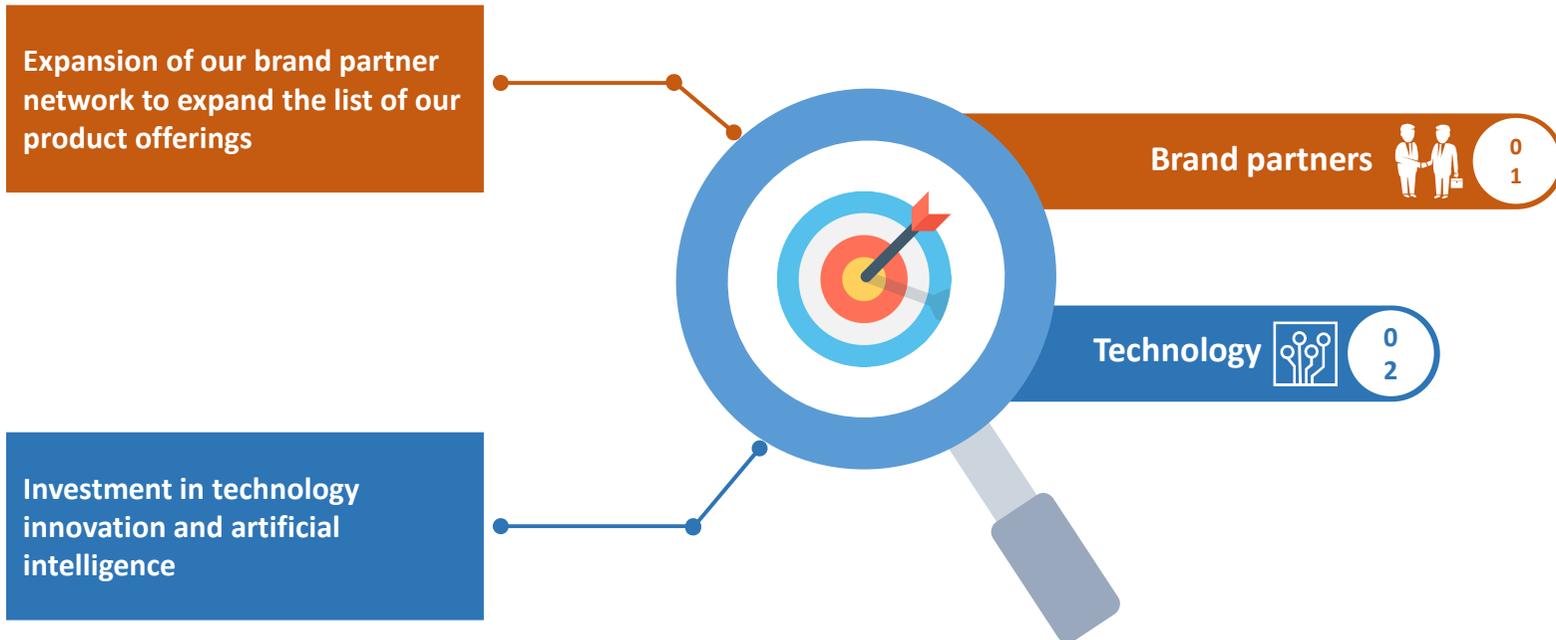
2026
onwards

- **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



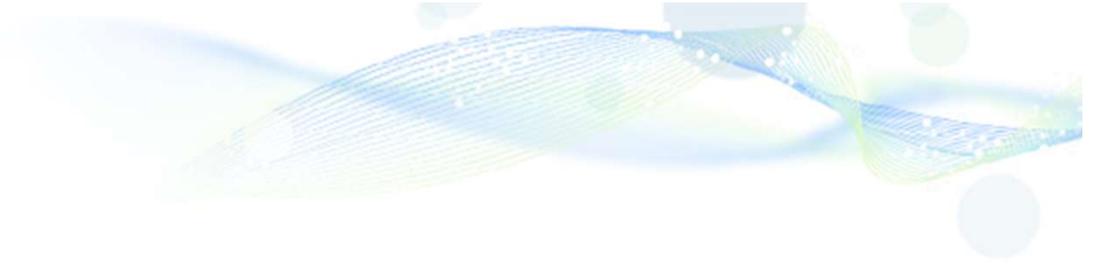
Bandwidth & scalability



Automation levels



Security



Financial Performance of IntraSoft Technologies Limited



Financial Performance – IntraSoft Technologies Limited

Unaudited Consolidated Statement of Profit & Loss		
Particulars	Quarter Ended	
	Dec-25	Dec-24
₹ (In Lakhs)		
Revenue From Operations	13,666.67	12,834.04
Cost of Goods Sold	8,784.30	8,149.44
Gross Profit	4,882.37	4,684.60
Shipping and Handling Expenses	2,134.30	1,919.74
Sales & Marketing Expenses	2,058.89	1,912.82
Employee Benefit Expense	145.48	212.94
Other Expenses	153.63	199.99
Earnings From Operations	390.07	439.11
Other Income (Net)	3.08	8.69
Earnings Before Interest, Tax, Depreciation & Amortization	393.15	447.80
Depreciation & Amortization	16.78	23.66
Earnings Before Interest & Tax	376.37	424.14
Finance Costs	25.96	31.39
Profit Before Tax (PBT)	350.41	392.75
Tax Expense	88.88	122.30
Profit After Tax (PAT)	261.53	270.45

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