# Firstsource Solutions
# Earnings Presentation
## Q4FY26



# Disclaimer

Certain statements in this presentation concerning our future growth prospects are forward-looking statements, which involve a number of risks and uncertainties that could cause actual results to differ materially from those in such forward-looking statements. The risks and uncertainties relating to these statements include, but are not limited to risks and uncertainties regarding fluctuations in earnings, our ability to manage growth, intense competition in BPS market including those factors which may affect our cost advantage, wage increases, our ability to attract and retain highly skilled professionals, time and cost overruns on client contracts, client concentration, our ability to manage ramp-ups and growth, our ability to manage our international operations, reduced demand in our key focus verticals, disruptions in telecom infrastructure and technology, our ability to successfully complete and integrate potential acquisitions, liability for damages on our service contracts, performance of our subsidiaries, withdrawal of government fiscal incentives, political instability, legal restrictions on raising capital and acquiring companies outside India, unauthorized use of our intellectual property and general economic conditions affecting our industry. Firstsource may, from time to time, make additional written and oral forward-looking statements, including our reports to shareholders. The company does not undertake to update any forward-looking statements that may be made from time to time by or on behalf of the company.

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# About Us

Established in **2001**
Public listing in 2007

Part of **RP-Sanjiv Goenka Group**
Since 2012

## Specialized BPS partner
Deep domain intelligence; agent-first operations; compounding competitive advantage

## Leader in chosen verticals
Banking & Financial Services, Healthcare, Communications, Media & Technology, Retail and Utilities

## 200+ global clients# including
Several Fortune 500, FTSE 100 and ASX200 companies

## Deep partnerships with clients
Average tenure of top 5 clients is over 21 years

## 36,205* Firstsourcers
Across US, UK, India, Canada, Philippines, South Africa, UAE, Australia, Mexico, Romania, Trinidad & Turkey

Revenues of **INR 95.6 Billion**
(US$1,082 Million) in FY26

#For clients with trailing 12-months revenue over US$0.25m
*As on 31st March 2026

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# We are a part of RP-Sanjiv Goenka Group

Group turnover of
**~US$5 Bn***

EBITDA of
**~US$930 Mn***



Asset base of
**>US$8 Bn***

Over
**1.2 Mn*** Shareholders

One of India's **new-age and fastest growing** Conglomerates

Strong workforce of **55,000+** employees, belonging to different nationalities

Presence in **60+** countries

**100+ offices** worldwide

CESC LIMITED

India's first fully integrated utility company, serving **4.7 Mn consumers** across **7 locations**

TOO YUMM! Evita Naturali DR. VAIDYA'S

*Too Yumm*, a **flavorful & better-for-you snacking**

Innovating in the **personal care category** through new-age brands *Naturali* and *Within Beauty*

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A **global intelligence partner** leveraging **deep domain expertise** and agent-first operations to design, implement, and operate intelligent enterprises—**underwriting outcomes** at every stage.

LUCKNOW SUPER GIANTS

LSG is a premier IPL franchisee focused on **nurturing the future of Indian cricket**

PCBL CHEMICAL
AQUAPHARM

A **Global Specialty Chemical** company and **India's Largest** Carbon Black player

QUEST

Eastern India's definitive **destination for luxury, style, and curated lifestyle experiences**

sa re ga ma

An entertainment Company with **IP at its core** having diverse portfolio of **170k+** songs, **70+** films, **10k+ hrs** TV serials, **45+** web series, artist management & live events.

HARRISONS MALAYALAM LIMITED

India's **largest** producer of rubber & South India's **second largest** cultivator of tea

spencers
Nature's Basket

India's **finest gourmet and multi-format** organized retailer with varied assortments

FORTUNE HELLO! OPEN Hook

Delivering **sharp journalism, bold storytelling, and immersive experiences across print, digital, and video**—shaping conversations in business, culture, lifestyle and current affairs

*All figures are for FY25 or as on 31st March 2025

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# Our Verticals

## HEALTHCARE

US$361m* 33%

**10** of Top 15
Health plans in the US

**200+**
Health systems in the US

## BANKING & FINANCIAL SERVICES

US$350m* 33%

**14** of Top 20
Mortgage lenders & servicers in the US

**7** of Top 10
Credit card issuers in the US

**3** of Top 6
Retail banks in the UK

## COMMUNICATION, MEDIA & TECHNOLOGY

US$230m* 21%

**1** of Top 2
Media companies in the UK

**4** of Top 5
Telecom companies in the UK

**3** of Top 5
Telecom & media companies in the US

**4** of Top 5
Consumer Tech companies in the US

## DIVERSIFIED INDUSTRIES

US$140m* 13%

**4** of Top 6
Energy providers in the UK

**2** of Top 10
Retailers in the UK

*US$ revenue and % revenue contribution on TTM basis

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# Our core strengths

## Experienced leadership team



**Ritesh Idnani**
MD & CEO



**Dinesh Jain**
Chief Financial Officer



**Vivek Sharma**
Head – CMT, BFS and Emerging Geos



**Rajiv Malhotra**
Head – Europe, Middle East & Africa



**Matthew Barlow**
Head - Healthcare Payer



**Scott Schrader**
Head - Healthcare Provider



**Sohit Brahmawar**
Chief Operating Officer



**Arjun Mitra**
Head – Collections



**Ashish Chawla**
Head – CX and Consulting



**Sundara Sukavanam**
Head – Enterprise Transformation Office



**Hasit Trivedi**
Chief Digital & AI Officer



**Shamita Mukherjee**
Chief Human Resources Officer

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# Performance Highlights

## Q4FY26



# Performance Summary | Q4FY26

## REVENUE

**₹ 25,835 Million (US$ 283 Million)**

YoY growth of 19.5%
YoY constant currency growth of 11.6%
QoQ constant currency growth of 3.0%

## EBIT

**₹ 3,143 Million (Margin 12.2%)**

YoY growth of 29.8%
YoY margin expansion of 100bps
QoQ margin expansion of 30bps

## PROFIT AFTER TAX

**₹ 2,052 Million (Margin 7.9%)**

YoY growth of 27.7%
QoQ growth of 1.5%*

## EARNINGS PER SHARE (Diluted)

**₹ 2.91 per share**

Q3FY26 at ₹ 1.71 per share
Q4FY25 at ₹ 2.28 per share

*Q3FY26 PAT was adjusted for exceptional items, which include one-time Labour Codes impact

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# Performance Summary | FY26

## REVENUE

**₹ 95,564 Million (US$ 1,082 Million)**

YoY growth of 19.7%
YoY constant currency growth of 13.6%

## EBIT

**₹ 11,221 Million (Margin 11.7%)**

YoY growth of 27.4%
YoY margin expansion of 70bps

## PROFIT AFTER TAX

**₹ 7,543 Million (Margin 7.9%)**

YoY growth of 26.9%
Reported PAT (including exceptional items): INR 6,744 million*

## EARNINGS PER SHARE (Diluted)

**₹ 9.56 per share**

FY25 at ₹ 8.42 per share

*Post exceptional items including one-time impact of new Labour Codes

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# Key Deal Wins | Q4FY26

- We won a large deal from a global leader in financial technology solutions in the US for to redesign and transform their customer experience.
- In Australia, we won a large onshore engagement with a leading regional water utility service provider to help them across their value chain.
- A leading US-based digital financial services company selected us for third-party collections management services.
- Secured additional business and were chosen as the global operations outsourcing partner by a leading UK-based MVNO to manage account servicing, billing, and customer support across multiple markets.
- Won business from a premium UK retail brand for customer experience services.
- Expanded our relationship with one of the leading mortgage lenders and servicers in the US for support services.
- Selected by a leading global media and publishing company, a new logo, for subscriber acquisition and account servicing operations.
- Selected by a leading UK-based utilities company, a new logo, for customer experience and outbound sales support services.
- Won deal from a leading receivables management company in the US, a new logo, for digital collections.

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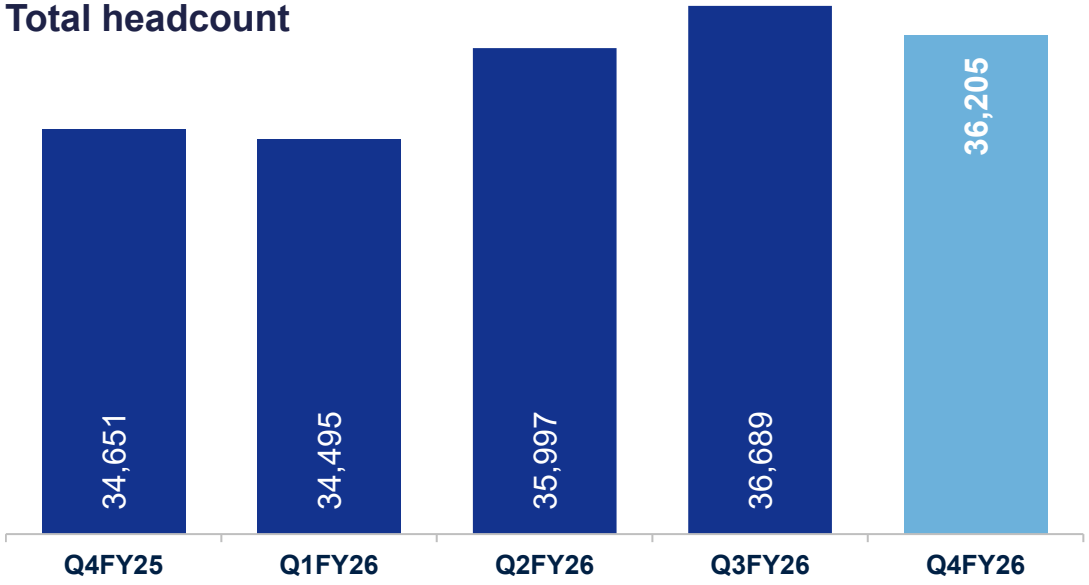
# Employee Base | Q4FY26

- Total headcount of **36,205** employees
- QoQ net headcount reduction of **484**
- YoY net headcount addition of **1,554**
- TTM employee attrition at **29.7%***
- **48.5%** of employees are women

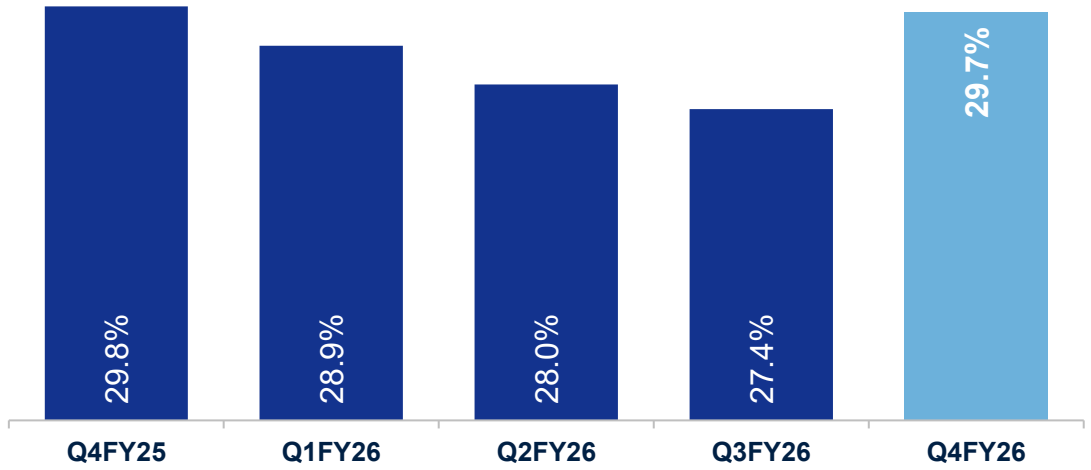
atd BEST 2026 Award Winner

Recognized with the ATD BEST Award from the Association for Talent Development (ATD), a global benchmark for organizations that build strong learning cultures aligned with business outcomes

**Total headcount**




**Attrition***




*For employees in employment for more than 180 days

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# Awards & Recognitions | Q4FY26

Recognized as a Leader in Everest Group Healthcare Payer Intelligent Operations PEAK Matrix® Assessment 2026

Recognized as a Leader in the Overall Market Segment of NelsonHall's Healthcare Payer Agility & Innovation NEAT Evaluation 2026




Named among the Frontier Firms in Microsoft's Frontier Firms of India & Southeast Asia

'A' rating in CDP Supplier Engagement Assessment; 'B' rating in CDP Climate and Water Security Disclosures for FY25

Awarded a Bronze Medal in the 2026 EcoVadis assessment, achieving an overall score of 70/100 and ranking in the 81st percentile globally.

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# Our FY27 guidance



## 10-13%

Constant currency revenue growth



## 12.25-12.75%

EBIT margin

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# Factsheet



# Cons. IndAS financials | Profit & Loss Statement

| In ₹ million | Q4FY25 | FY25 | Q1FY26 | Q2FY26 | Q3FY26 | Q4FY26 | QoQ | YoY | FY26 | YoY |
|---|---|---|---|---|---|---|---|---|---|---|
| Income from services | 21,678 | 79,721 | 22,209 | 23,147 | 24,674 | 26,130 | 5.9% | 20.5% | 96,161 | 20.6% |
| Other operating income | (63) | 82 | (33) | (25) | (244) | (296) | - | - | (597) | - |
| **Revenue from operations** | **21,615** | **79,803** | **22,177** | **23,122** | **24,431** | **25,835** | **5.7%** | **19.5%** | **95,564** | **19.7%** |
| **Revenue from operations (US$m)** | **$250** | **$944** | **$259** | **$265** | **$274** | **$283** | **3.2%** | **13.2%** | **$1,082** | **14.6%** |
| *QoQ growth % - constant currency* | *2.1%* | - | *1.6%* | *2.0%* | *4.6%* | *3.0%* | - | - | - | - |
| *YoY growth % - constant currency* | *25.0%* | *22.6%* | *19.2%* | *13.8%* | *10.6%* | *11.6%* | - | - | *13.6%* | - |
| Manpower expenses | 13,515 | 49,958 | 13,207 | 13,618 | 14,312 | 14,766 | 3.2% | 9.3% | 55,903 | 11.9% |
| Operating expenses | 4,771 | 17,769 | 5,499 | 5,744 | 6,093 | 6,764 | 11.0% | 41.8% | 24,099 | 35.6% |
| **EBITDA** | **3,328** | **12,076** | **3,471** | **3,760** | **4,027** | **4,304** | **6.9%** | **29.3%** | **15,562** | **28.9%** |
| ***EBITDA margin*** | ***15.4%*** | ***15.1%*** | ***15.7%*** | ***16.3%*** | ***16.5%*** | ***16.7%*** | ***20bp*** | ***130bp*** | ***16.3%*** | ***120bp*** |
| Depreciation & amortization | 906 | 3,270 | 972 | 1,096 | 1,112 | 1,161 | 4.4% | 28.1% | 4,341 | 32.7% |
| **EBIT** | **2,422** | **8,806** | **2,498** | **2,665** | **2,915** | **3,143** | **7.8%** | **29.8%** | **11,221** | **27.4%** |
| ***EBIT margin*** | ***11.2%*** | ***11.0%*** | ***11.3%*** | ***11.5%*** | ***11.9%*** | ***12.2%*** | ***30bp*** | ***100bp*** | ***11.7%*** | ***70bp*** |
| Finance cost | 426 | 1,479 | 434 | 428 | 433 | 520 | 20.3% | 22.0% | 1,815 | 22.7% |
| Other income, net | 21 | (9) | 68 | (13) | 36 | (17) | - | - | 75 | - |
| Exceptional items, net | - | 88 | - | 19 | (1,001) | - | - | - | (982) | - |
| Profit before taxes | 2,017 | 7,407 | 2,132 | 2,243 | 1,517[#] | 2,606 | 71.8% | 29.2% | 8,498[#] | 14.7% |
| Taxes and minority interest | 410 | 1,462 | 439 | 448 | 313 | 554 | 76.6% | 34.9% | 1,754 | 20.0% |
| **Profit after tax** | **1,607** | **5,945** | **1,693** | **1,795** | **1,203[#]** | **2,052** | **70.6%** | **27.7%** | **6,744[#]** | ***13.5%*** |
| *Net margin* | *7.4%* | *7.4%* | *7.6%* | *7.8%* | *4.9%* | *7.9%* | *300bp* | *50bp* | *7.1%* | *-30bp* |
| Diluted EPS (₹/share) | 2.28 | 8.42 | 2.40 | 2.54 | 1.71[#] | 2.91 | 70.2% | 27.6% | 9.56[#] | 13.5% |

[#]Post exceptional items including one-time impact of new Labour Codes

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# Cons. IndAS financials | Balance Sheet

| In ₹ million | As on Mar 31, 2025 | As on Mar 31, 2026 |
|---|---|---|
| **Assets** | | |
| **Non-current assets** | | |
| Fixed assets | 3,254 | 3,403 |
| Right-of-use assets | 9,126 | 8,558 |
| Goodwill on consolidation | 36,799 | 42,655 |
| Other intangible assets | 1,248 | 1,351 |
| Investment in associates | 0 | - |
| Financial assets | | |
| Investments | 115 | 658 |
| Other financial assets | 1,026 | 918 |
| Deferred tax assets | 2,735 | 3,910 |
| Income tax assets, net | 714 | 896 |
| Other non-current assets | 1,965 | 3,228 |
| **Total non-current assets** | **56,982** | **65,577** |
| **Current assets** | | |
| Financial assets | | |
| Current investments | 616 | 502 |
| Trade receivables | 16,860 | 20,786 |
| Cash and cash equivalents | 1,542 | 2,586 |
| Other bank balances | 128 | 107 |
| Other financial assets | 206 | 235 |
| Other current assets | 2,888 | 3,407 |
| **Total current assets** | **22,240** | **27,623** |
| **Total assets** | **79,222** | **93,200** |

| In ₹ million | As on Mar 31, 2025 | As on Mar 31, 2026 |
|---|---|---|
| **Equity and liabilities** | | |
| **Shareholder's Funds** | | |
| Equity share capital | 6,970 | 6,970 |
| Reserve and surplus | 34,006 | 36,875 |
| Non-controlling interest | 4 | 4 |
| **Total equity** | **40,980** | **43,849** |
| **Non-current liabilities** | | |
| Financial liabilities | | |
| Long-term borrowings | 3,419 | 1,897 |
| Lease liabilities | 8,070 | 7,315 |
| Other financial liabilities | 580 | 2,328 |
| Provisions | 241 | 1,140 |
| Deferred tax liabilities | 1,645 | 1,886 |
| **Total non-current liabilities** | **13,955** | **14,566** |
| **Current liabilities** | | |
| Financial liabilities | | |
| Short-term and other borrowings | 11,908 | 17,478 |
| Trade payables | 3,976 | 5,579 |
| Lease liabilities | 2,296 | 2,528 |
| Other financial liabilities | 4,209 | 6,469 |
| Other current liabilities | 1,106 | 1,405 |
| Provisions | 643 | 973 |
| Provision for tax, net | 149 | 352 |
| **Total current liabilities** | **24,287** | **34,785** |
| **Total liabilities** | **79,222** | **93,200** |

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# Cons. IndAS financials | Cash Flow Statement

| In ₹ million | Year ended Mar 31, 2025 | Year ended Mar 31, 2026 |
|---|---|---|
| **Cash flow from operating activities** | | |
| Net profit before taxation and non-controlling interest | 7,407 | 8,498 |
| Depreciation and amortization | 3,270 | 4,341 |
| Finance costs (for borrowings & lease liabilities) | 1,479 | 1,815 |
| Non-cash expense | 1,151 | 1,566 |
| Non-operating items | (45) | (83) |
| Exceptional items, net | (88) | 982 |
| Working capital changes | (4,944) | (3,082) |
| Income taxes paid | (1,219) | (1,897) |
| ***Net cash generated from/(used in) operating activities (A)*** | **7,011** | **12,140** |
| **Cash flow from investing activities** | | |
| Capital expenditure, net | (2,236) | (1,324) |
| Interest income received | 27 | 41 |
| (Increase)/decrease in current investments | (160) | 175 |
| Investment in short-term fixed deposits | 1 | 33 |
| Acquisition of business | (5,099) | (2,638) |
| Purchase of non-current investment | - | (279) |
| Earmarked balances with banks | 9 | (12) |
| Payment of contingent consideration towards acquisition | - | (518) |
| ***Net cash generated from/(used in) investing activities (B)*** | **(7,459)** | **(4,524)** |
| **Cash Flow from financing activities** | | |
| Net change in borrowings | 6,787 | 2,019 |
| Net interest paid | (1,579) | (1,788) |
| Payment of lease liabilities | (1,636) | (2,597) |
| Purchase of treasury shares, net | (362) | (500) |
| Purchase of non controlling interest in subsidiary | (225) | - |
| Dividend paid (net) | (2,759) | (3,801) |
| ***Net cash generated from/(used in) financing activities (C)*** | **226** | **(6,668)** |
| **Net increase/(decrease) in cash and cash equivalents (A+B+C)** | **(222)** | **948** |
| Cash and cash equivalents at the beginning of the period | 1,748 | 1,542 |
| Foreign exchange (loss)/gain on translating cash and cash equivalents | 16 | 95 |
| ***Closing cash and cash equivalents*** | **1,542** | **2,586** |
| Current investments | 616 | 502 |
| **Cash and cash equivalents including investments** | **2,158** | **3,087** |

**OCF/EBITDA: 78%**

FY25: 58%

**FCF/PAT: 160%**

FY25: 80%

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# Operating Metrices | Q4FY26

| | | Q4FY24 | Q1FY25 | Q2FY25 | Q3FY25 | Q4FY25 | Q1FY26 | Q2FY26 | Q3FY26 | Q4FY26 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Revenue by Vertical** | Banking & Financial Services | 37.3% | 36.4% | 34.4% | 32.4% | 33.4% | 32.5% | 33.2% | 31.7% | 32.2% |
| | Healthcare | 32.9% | 35.7% | 36.3% | 34.0% | 33.8% | 33.4% | 33.5% | 32.1% | 34.4% |
| | Communications, Media & Tech | 23.6% | 22.3% | 21.3% | 20.3% | 21.0% | 22.4% | 21.7% | 21.2% | 19.9% |
| | Diverse Industries | 6.2% | 5.6% | 8.0% | 13.3% | 11.8% | 11.7% | 11.6% | 15.0% | 13.5% |
| **Revenue by Geography** | North America | 65.0% | 68.2% | 68.5% | 66.3% | 67.7% | 68.7% | 69.4% | 67.2% | 68.0% |
| | Europe, Middle East, and Africa | 34.9% | 31.8% | 31.4% | 33.4% | 31.5% | 30.1% | 29.4% | 31.7% | 30.6% |
| | Rest of World | 0.1% | 0.0% | 0.1% | 0.3% | 0.8% | 1.2% | 1.2% | 1.1% | 1.4% |
| **Revenue by Delivery** | Offshore & Nearshore | 31.4% | 35.0% | 35.8% | 40.1% | 37.8% | 41.2% | 41.6% | 43.4% | 43.0% |
| | Onshore | 68.6% | 65.0% | 64.2% | 59.9% | 62.2% | 58.8% | 58.4% | 56.6% | 57.0% |
| **Client Addition#** | New logos (*added during the quarter*) | 9 | 10 | 13 | 13 | 7 | 17 | 10 | 9 | 11 |
| | Strategic logos (*added during the quarter*) | 3 | 2 | 3 | 5 | 2 | 9 | 4 | 5 | 6 |
| **Client Concentration** | Top 5 clients *(share of total revenues)* | 36.7% | 34.6% | 32.5% | 29.0% | 29.3% | 29.6% | 28.9% | 28.1% | 28.0% |
| | Top 10 clients *(share of total revenues)* | 52.6% | 51.5% | 48.6% | 43.4% | 43.7% | 42.6% | 42.3% | 40.7% | 39.9% |
| **Client Distribution#** | US$ 1m+ clients *(nos.)* | 103 | 100 | 105 | 107 | 116 | 141 | 142 | 141 | 150 |
| | US$ 5m+ clients *(nos.)* | 25 | 25 | 26 | 28 | 30 | 38 | 39 | 41 | 42 |
| | US$ 10m+ clients *(nos.)* | 13 | 13 | 13 | 14 | 15 | 17 | 17 | 18 | 17 |
| | US$ 20m+ clients *(nos.)* | 8 | 9 | 11 | 10 | 10 | 11 | 9 | 9 | 9 |
| | US$ 50m+ clients *(nos.)* | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| **Revenue by Currency** | USD | 64.8% | 67.9% | 68.2% | 64.9% | 65.7% | 67.9% | 68.5% | 66.1% | 67.4% |
| | GBP | 34.4% | 31.4% | 30.9% | 34.2% | 32.7% | 30.1% | 29.2% | 31.9% | 30.3% |
| | Others | 0.8% | 0.7% | 0.9% | 0.9% | 1.6% | 2.0% | 2.3% | 2.0% | 2.3% |
| **Employee Metrices** | Total employees *(period-end)* | 27,940 | 29,231 | 32,898 | 34,144 | 34,651 | 34,495 | 35,997 | 36,689 | 36,205 |
| | Net addition | 1,993 | 1,291 | 3,667 | 1,246 | 507 | (156) | 1,502 | 692 | (484) |
| | Attrition* *(TTM)* | 35.4% | 31.8% | 30.6% | 31.4% | 29.8% | 28.9% | 28.0% | 27.4% | 29.7% |

* For employees in continuous employment for more than 180 days | #Excludes Telemedik

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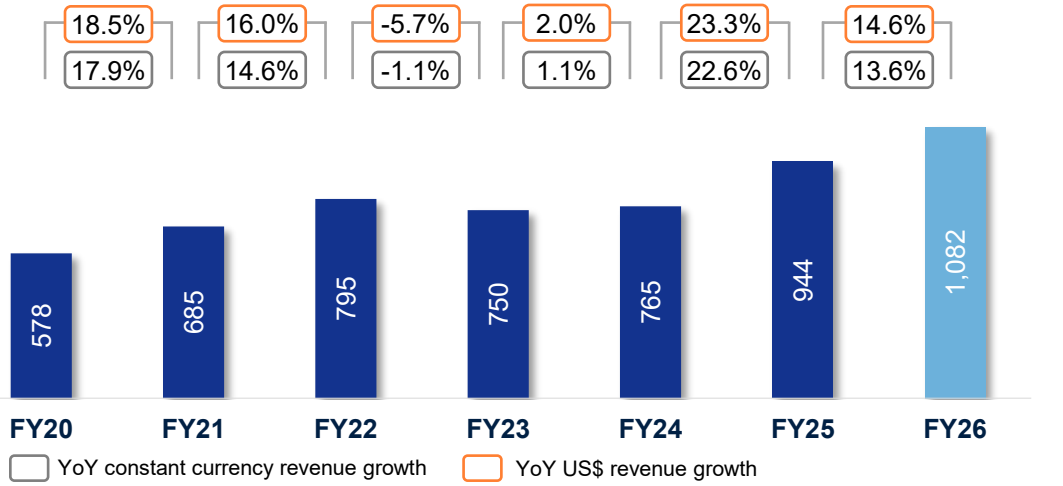
# Annexure



# Financial performance snapshot | FY26

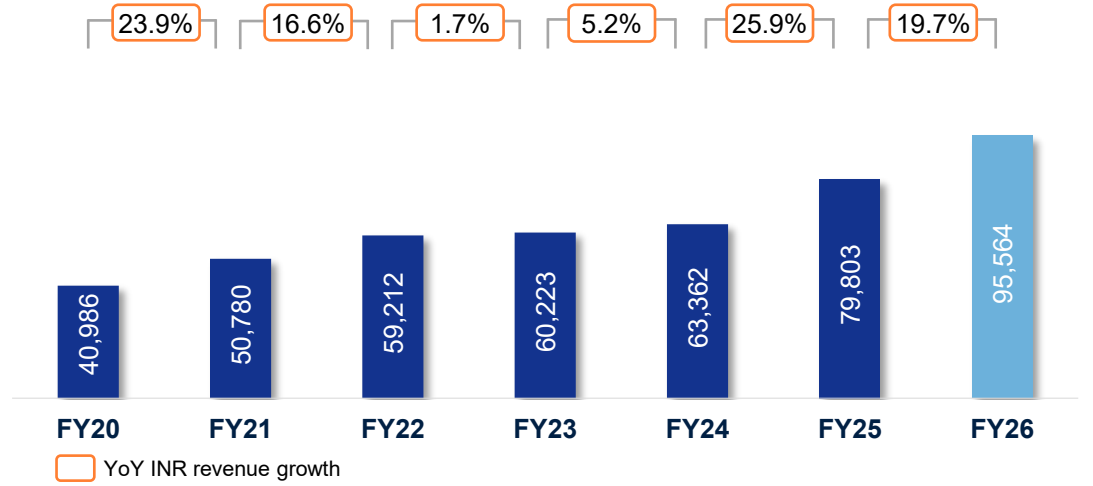
## Revenue

*(in $ million)*



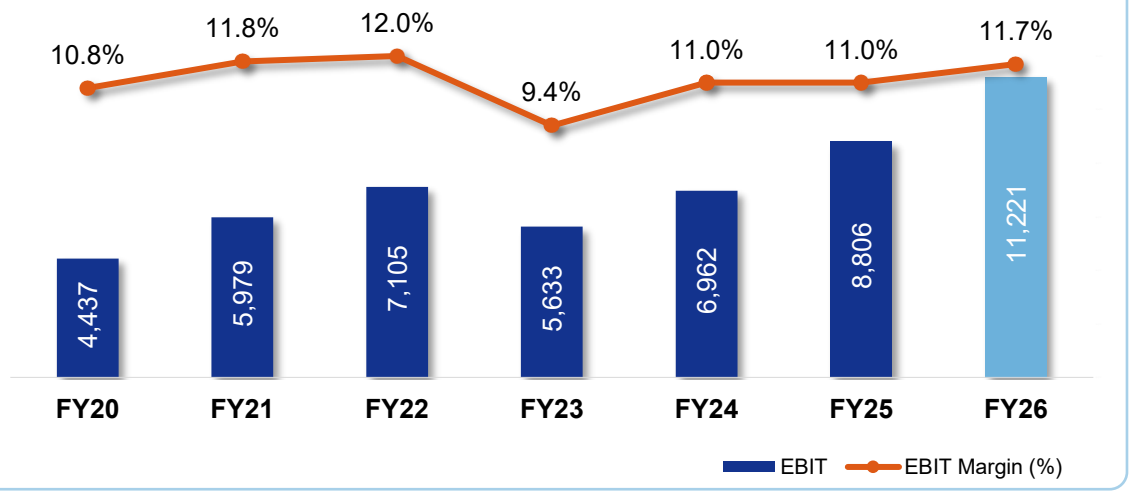

## Revenue

*(in ₹ million)*



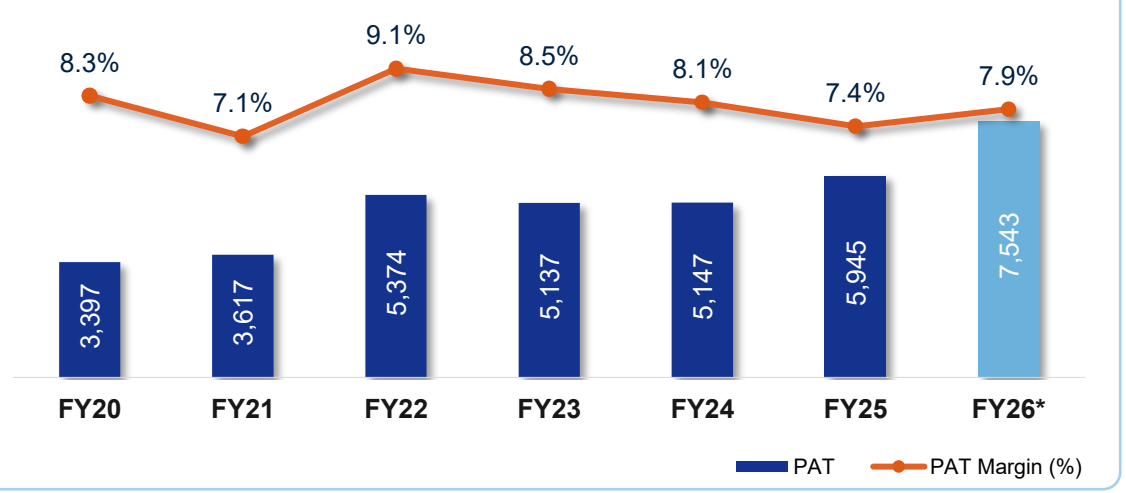

## EBIT and Margin (%)

*(in ₹ million)*




## PAT and Margin (%)

*(in ₹ million)*

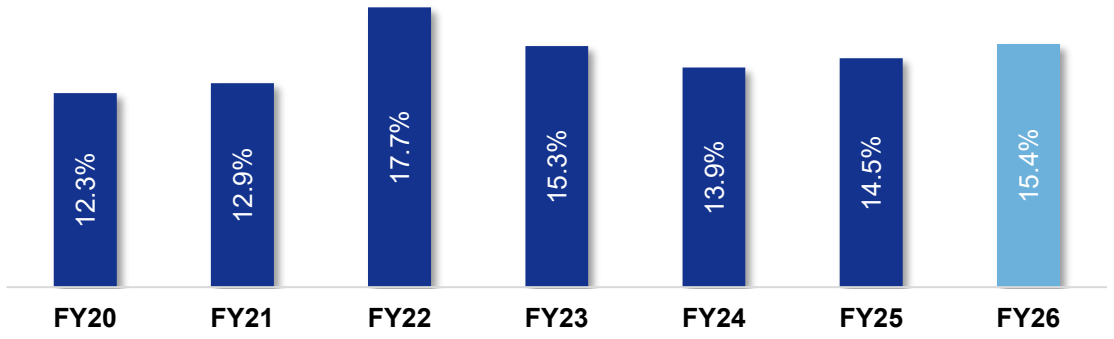



* Adjusted for exceptional items, which include one-time Labour Codes impact

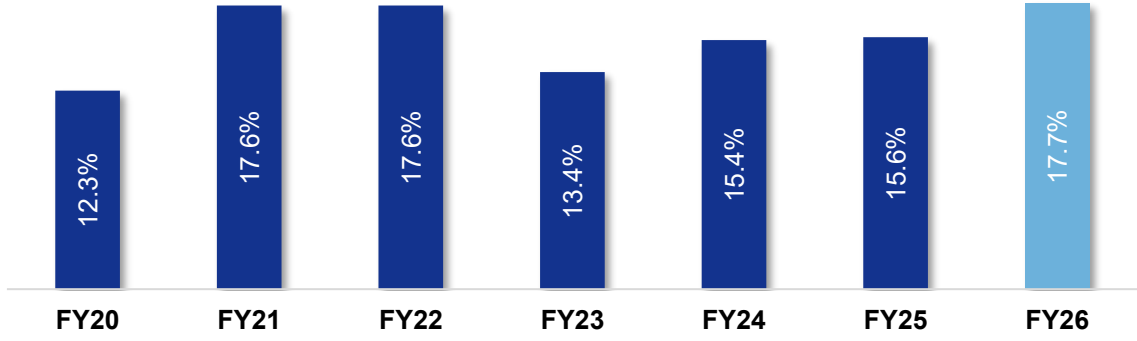
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# Key performance indicators | FY26

## Return on Equity (%)

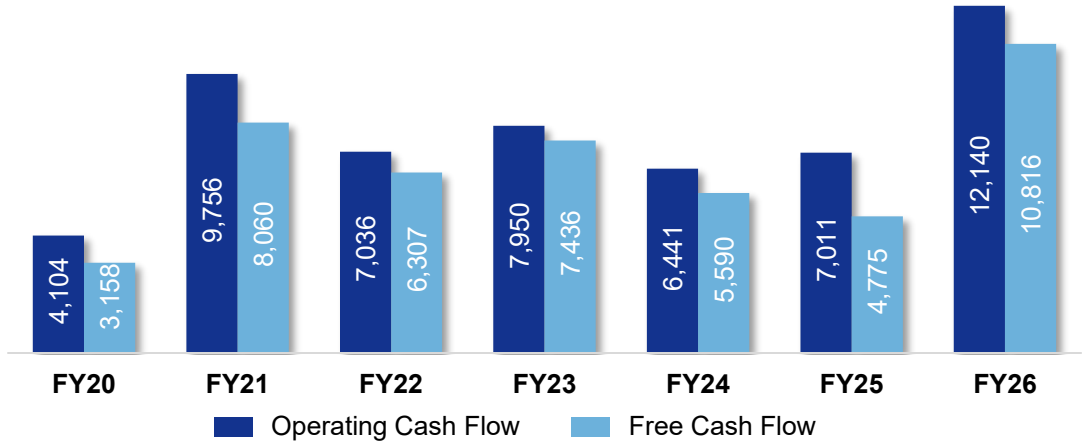



## Return on Capital Employed (%)



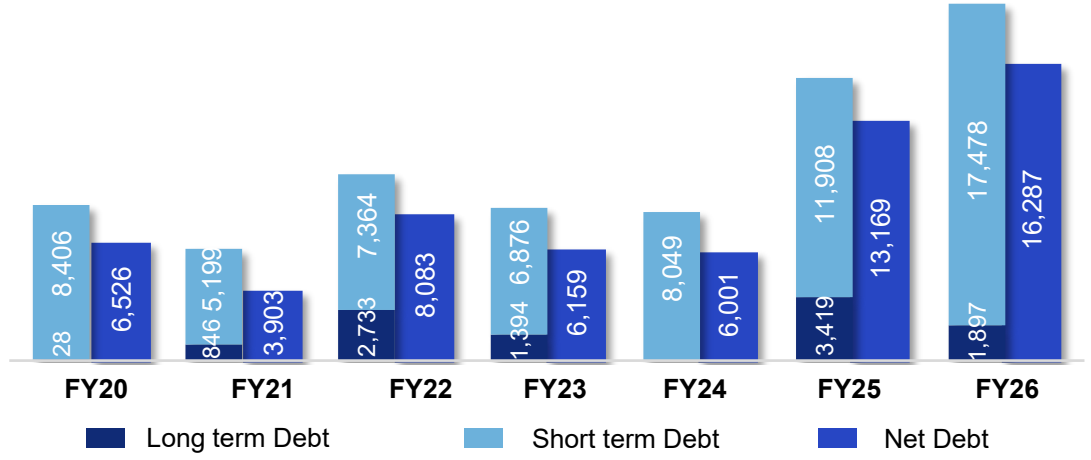

## Cash Flow

*(in ₹ million)*




## Debt Position

*(in ₹ million)*




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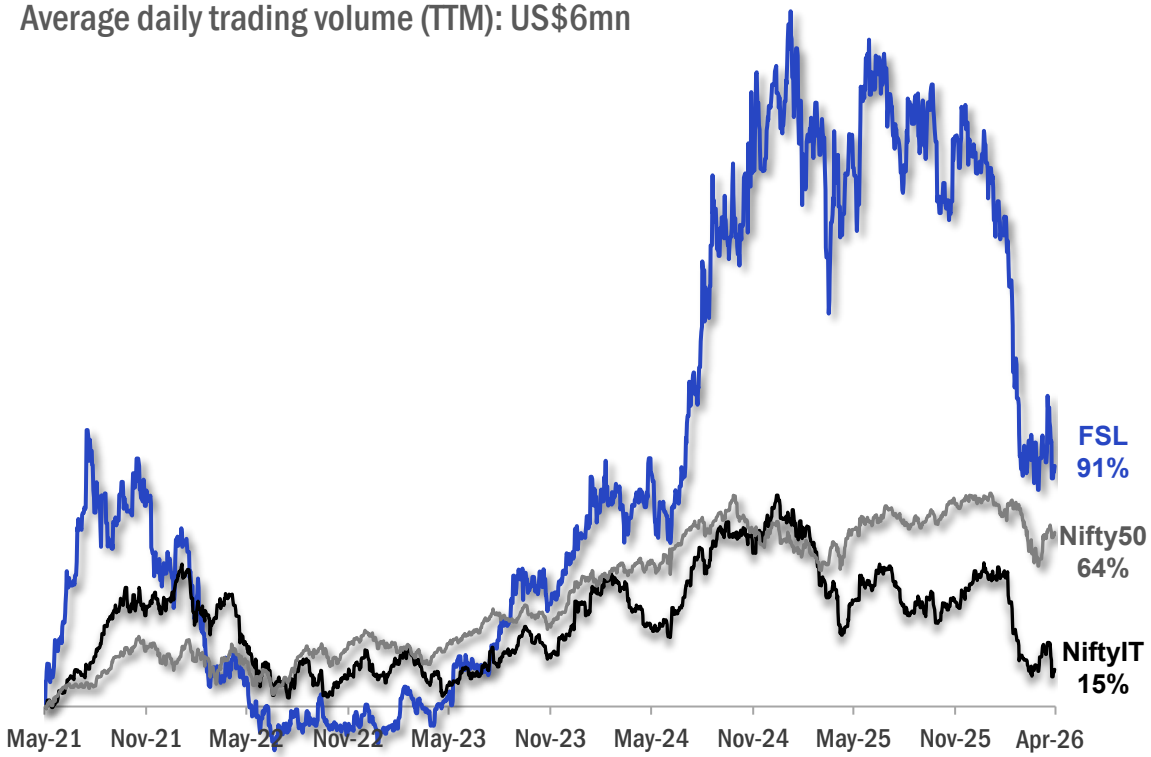
# Shareholder Returns

## Stock performance: Last 5 years^

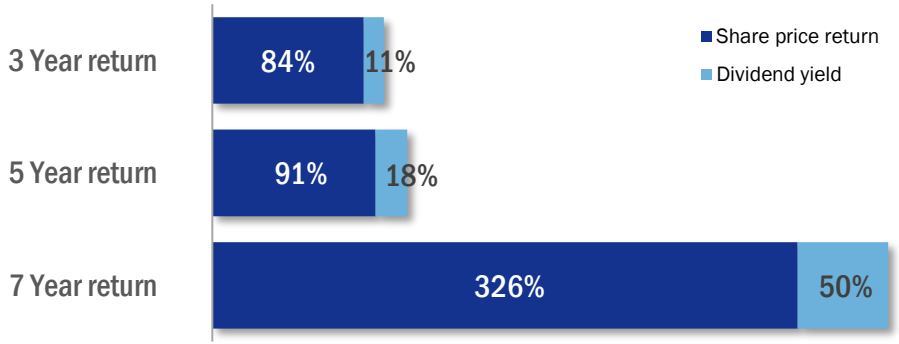
NSE: FSL | BSE: 532809 | Reuters: FISO.BO | Bloomberg: FSOL:IN

Market Capitalisation: US$1.8bn

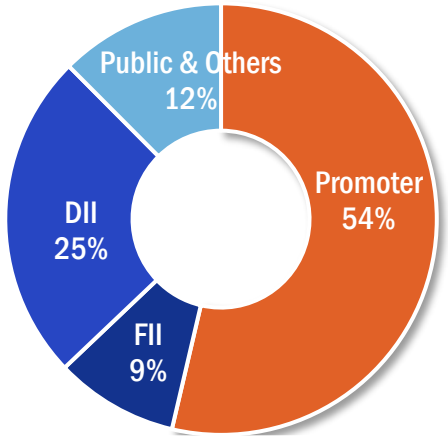
Average daily trading volume (TTM): US$6mn




## Total Shareholder Return^




## Shareholding Pattern*




### Key institutional shareholders

- HDFC Mutual Fund
- Life Insurance Corporation
- SBI Mutual Fund
- Vanguard Group
- Tata Mutual Fund
- Blackrock
- Abu Dhabi Investment Authority
- Aditya Birla Sun Life Mutual Fund
- White Oak
- Dimensional Fund

^Till 30th April 2026

*As on 31st March 2026

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