

Ref No: RML/2025-26/593

Date: July 17, 2025

To,
BSE Limited
Scrip Code: 543228

National Stock Exchange of India Limited
Symbol: ROUTE

Dear Sir/Madam,

Sub: Investor Presentation

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations 2015, we are enclosing herewith the Investor Presentation, that will be presented on July 18, 2025 to the Analysts in connection with the Unaudited Financial Results (Standalone and Consolidated) of the Company for the Quarter ended June 30, 2025.

The same is also available on the Company's website at www.routemobile.com

You are requested to take the above information on record.

Thanking you,
Yours truly,
For Route Mobile Limited

Rajdipkumar Gupta

Managing Director

DIN: 01272947

Encl: as above



Earnings Update

Q1 FY 25-26

Investor Presentation
July 17, 2025

Safe Harbor



Certain statements mentioned in this presentation concerning our future growth prospects are forward looking statements (the “Forward Statements”) and are based on reasonable expectations of the management, which involves a number of risks, and uncertainties that could cause actual results to differ materially from those in such Forward Statements. The risks and uncertainties relating to these Forward Statements include, but are not limited to, risks and uncertainties regarding fluctuations in our earnings, fluctuations in foreign exchange rates, revenue and profits, our ability to generate and manage growth, competition in CPaaS globally, wage increases in India, our ability to attract and retain highly skilled professionals, time and cost overruns on fixed-price and fixed time frame contracts, industry segment concentration, our ability to manage our international operations, our revenues being highly dependent on clients in the United States of America, reduced demand for technology in our key focus areas, disruptions in telecommunication networks or system failures, our ability to successfully complete and integrate potential acquisitions, liability for damages on our service contracts, withdrawal of fiscal governmental incentives, political instability, adverse impact of global pandemics (including COVID-19 impact), war, legal restrictions on raising capital or acquiring companies, unauthorized use of our intellectual property(ies) and general economic conditions affecting our businesses and industry. We may, from time to time, make additional written and oral Forward Statements . We do not undertake to update any Forward Statements that may be made from time to time by us or on our behalf, unless required under the law.

Route Mobile - Industry Leading Global CPaaS Platform



RML offers a scalable and flexible **Omnichannel CPaaS** platform to enterprises across industry verticals, globally



280+ direct MNO connects, overall access to **900+** MNOs (**Super Network**)



Global footprint across **20+ locations**; **2,100+** active billable clients



Infrastructure comprising **20+ data centers** and **6 SMSCs** globally



ESG leader, rated **"A"** by a reputed ESG rating agency



Niche Player in Magic Quadrant for CPaaS 2024 – **Gartner**
Key Vendor in four Hype Cycle Reports – **Gartner**
"Top Tier 1 A2P SMS vendor" – **Rocco**



₹45,230 mn Revenue for LTM ended 30 June 2025



₹5,014 mn EBITDA for LTM ended 30 June 2025



39.3 bn Billable transactions processed in Q1 25-26



₹ 10,826 mn Net Cash as on 30 June 2025
>100% CFO / EBITDA conversion in Q1 FY25-26

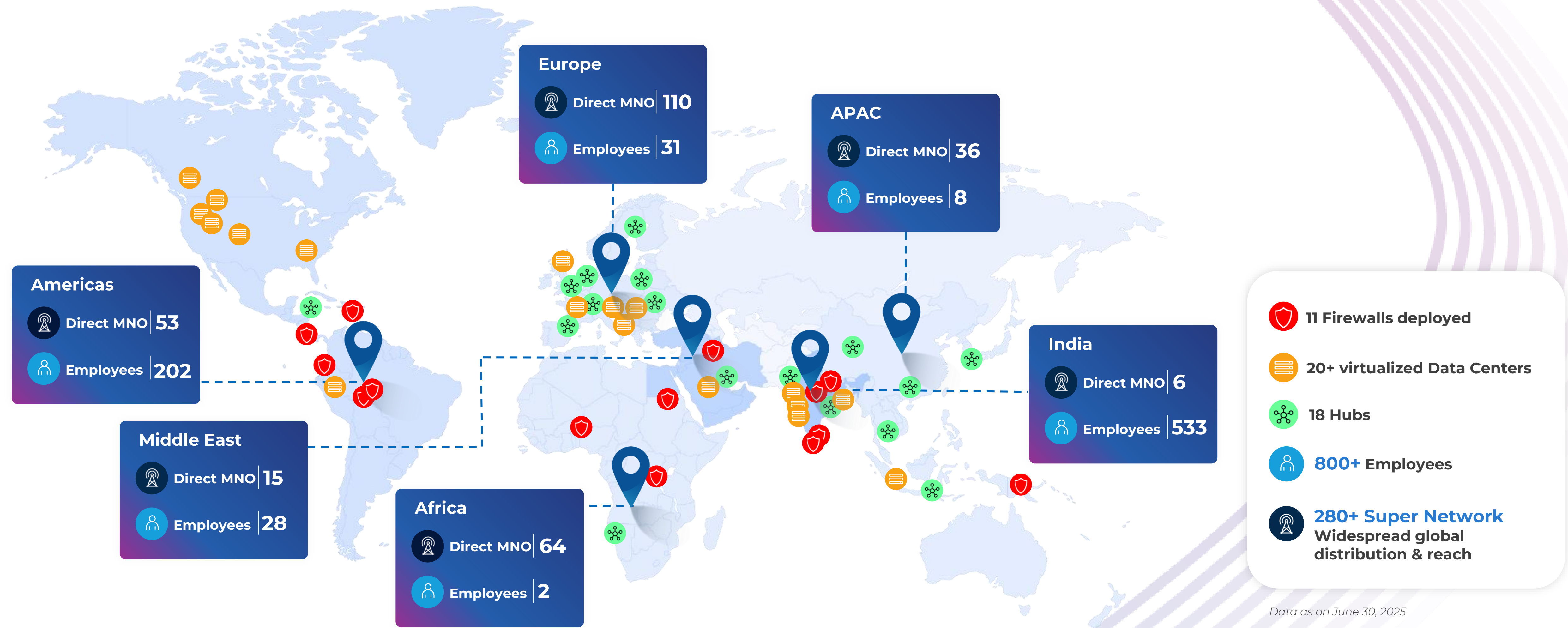


₹8.45 Earning Per Share (EPS) in Q1 25-26



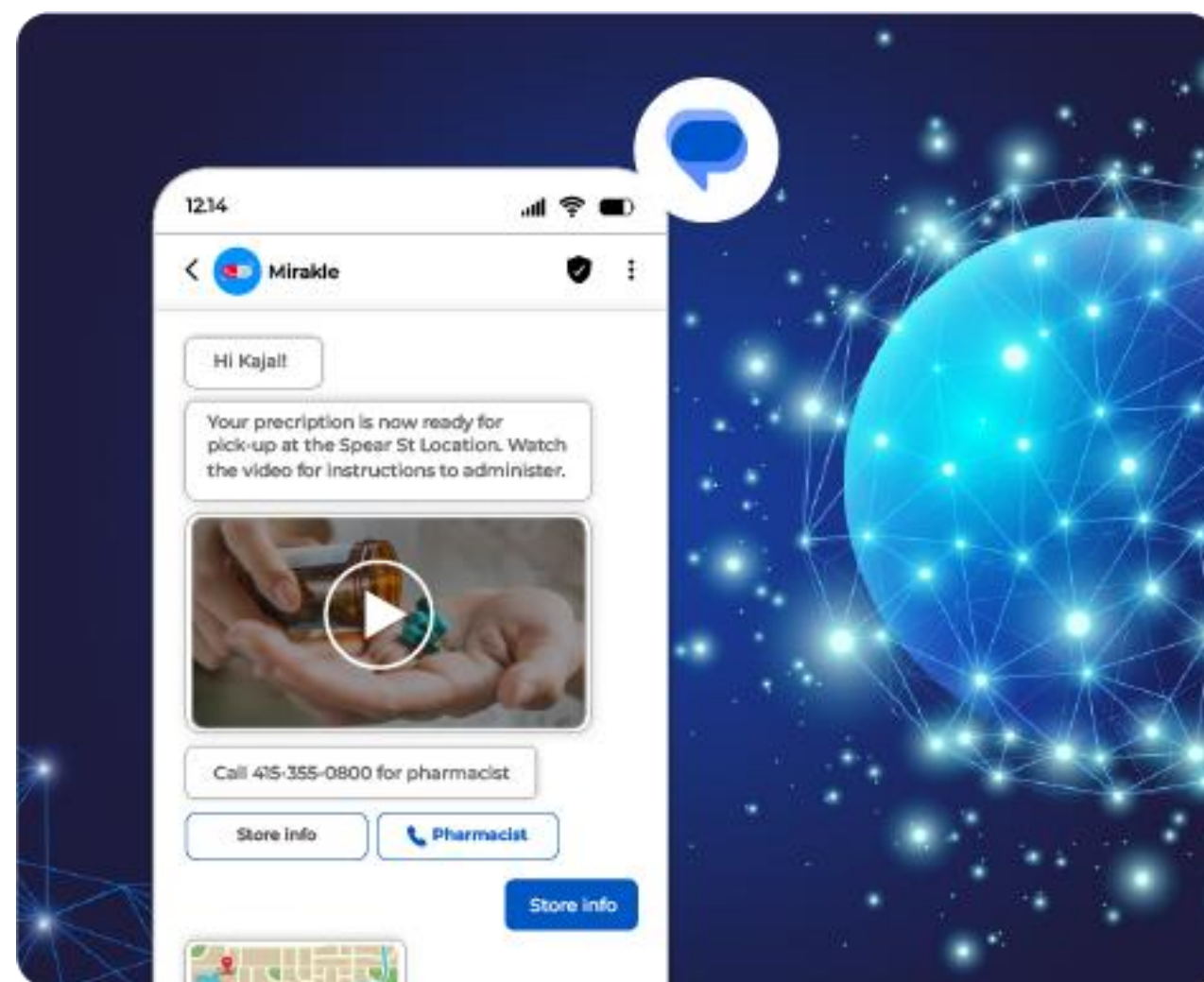
Board recommended **₹3 per share interim dividend**

Global Diaspora - Footprint & Super Network

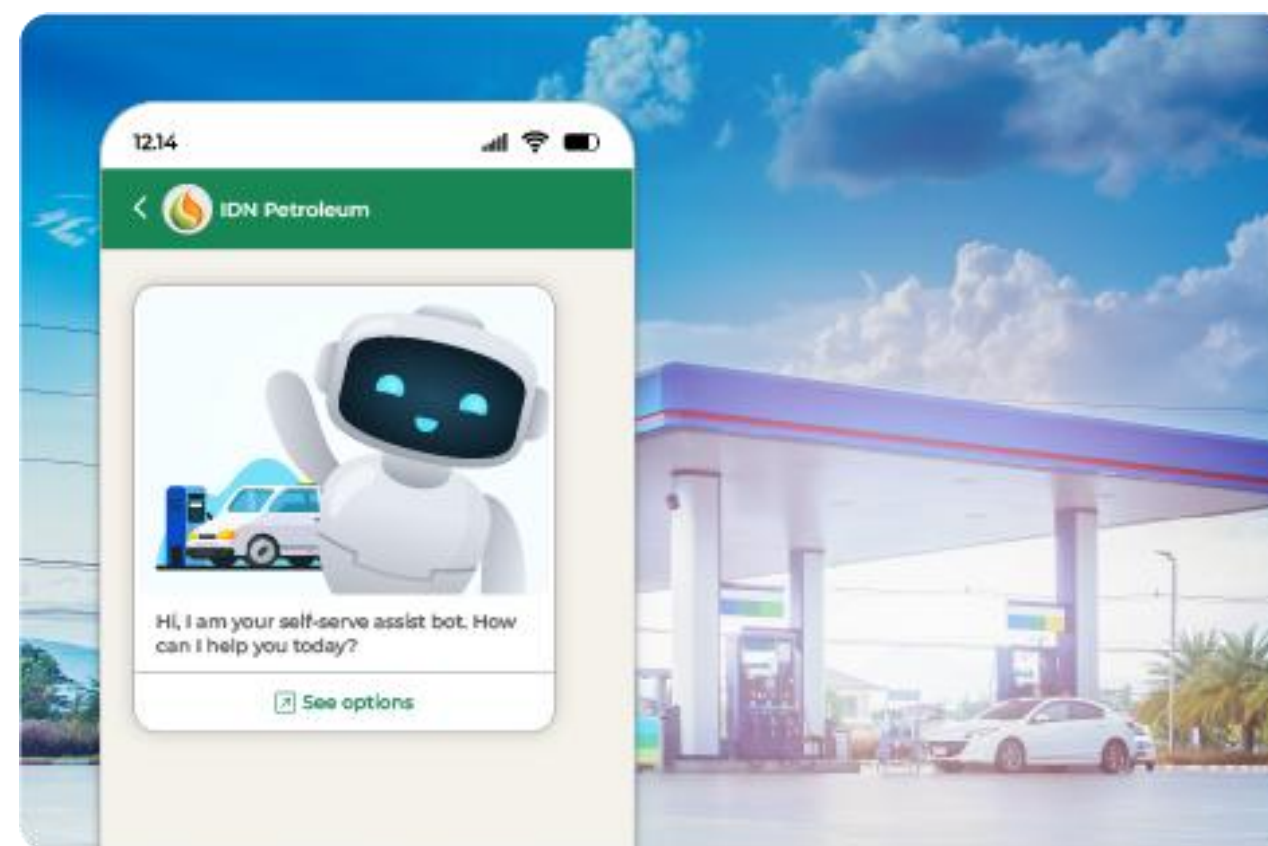


Key Developments

Key Developments since Q4 24-25



Developed a custom RCS app connector for a leading global system integrator, facilitating cloud marketplace distribution and resale globally, focusing on India, the US, and Brazil.



Launched a customized WhatsApp self-serve bot for India's largest commercial oil & gas company, enabling stakeholder-specific support for FAQs, enrollments, retail locators, and loyalty management across their extensive B2B network.



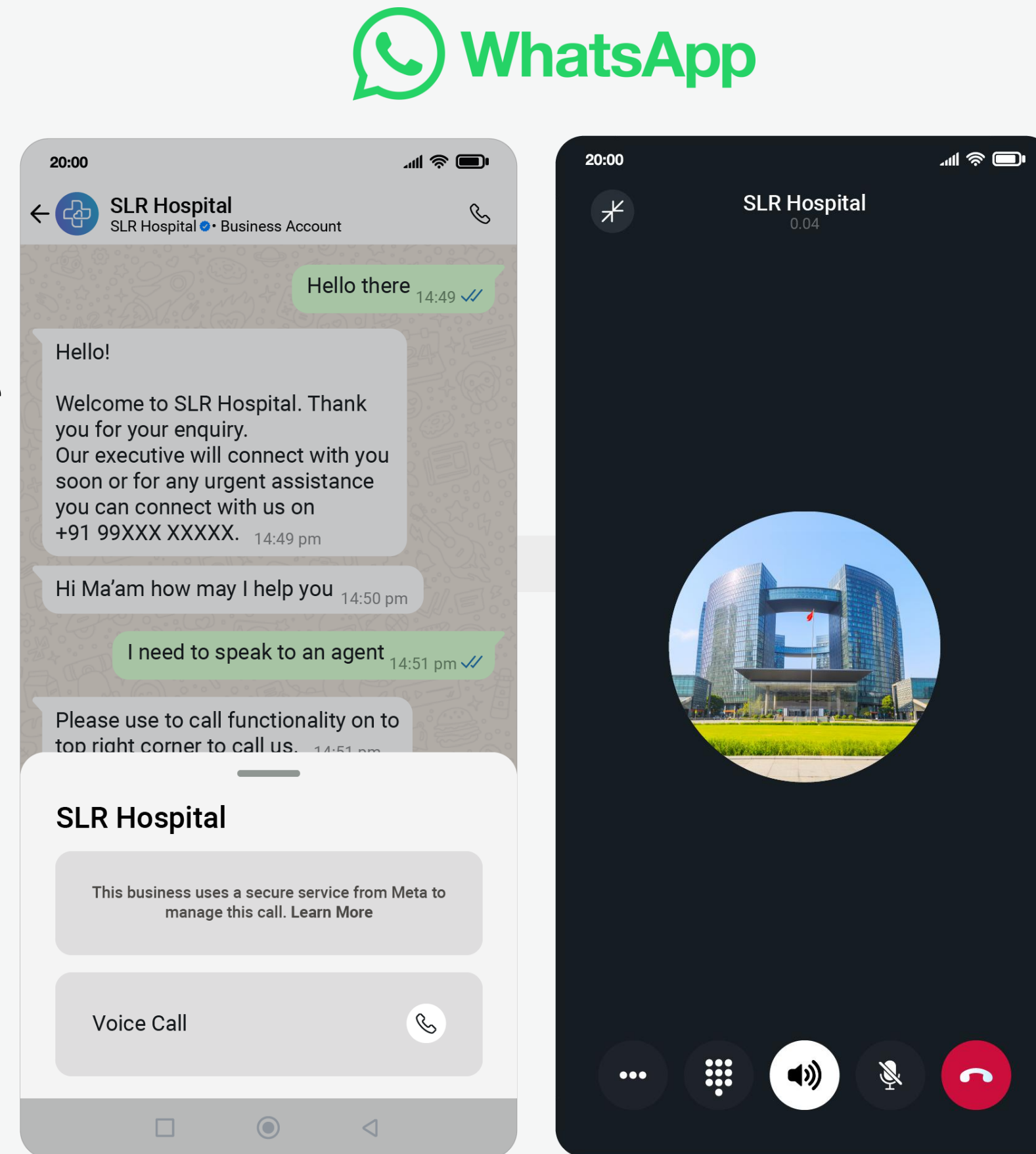
Signed a contract with a major LATAM MNO to deploy an advanced firewall solution, enhancing mobile network security across several countries in the region.

Focus on Expanding Product Portfolio

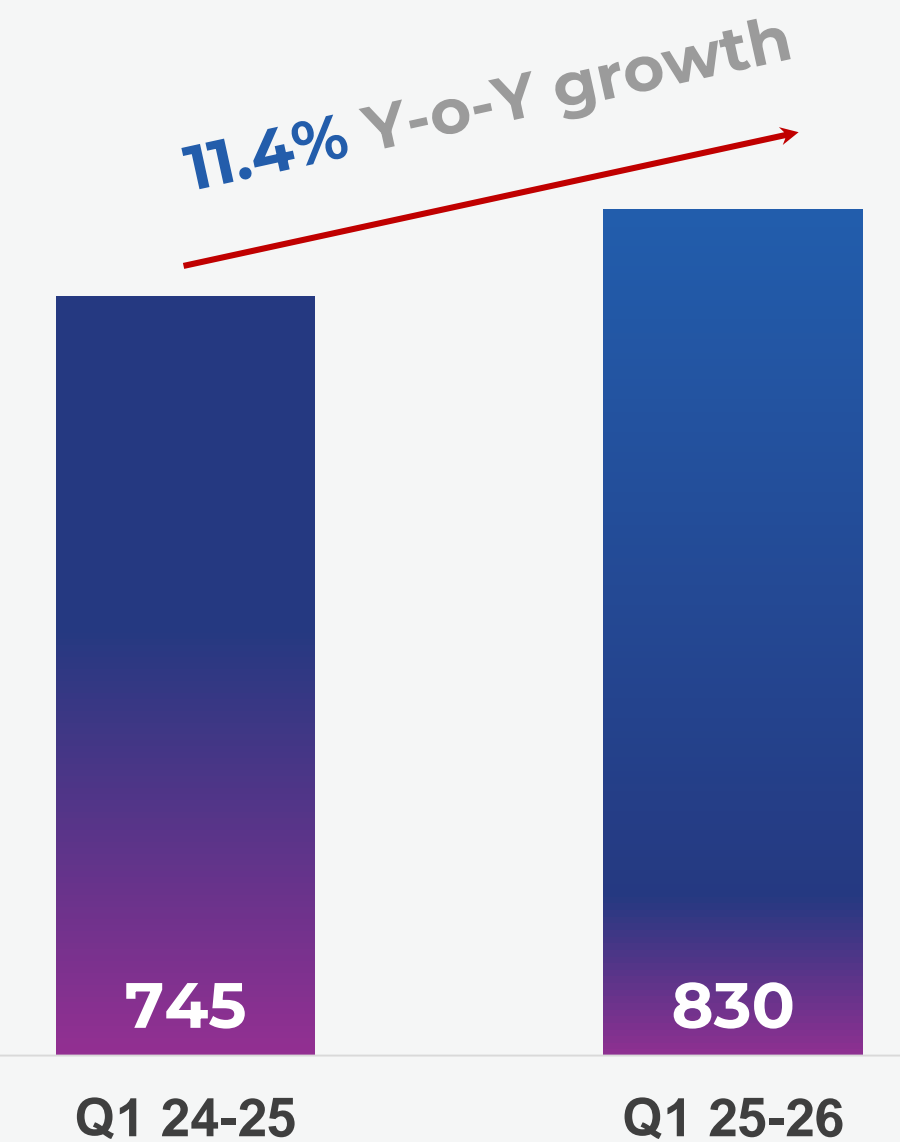


Enhanced patient engagement for a renowned hospital with WhatsApp Voice Calling

- Improved patient experience through instant voice support, encrypted calling, and OPD updates via WhatsApp.
- Reduced operational load with lower wait times and decreased helpline congestion.
- Expanded healthcare access in Tier 2 & 3 cities having limited call centre infrastructure.



New Products Revenue (in ₹ mn)



Key Business Metrics

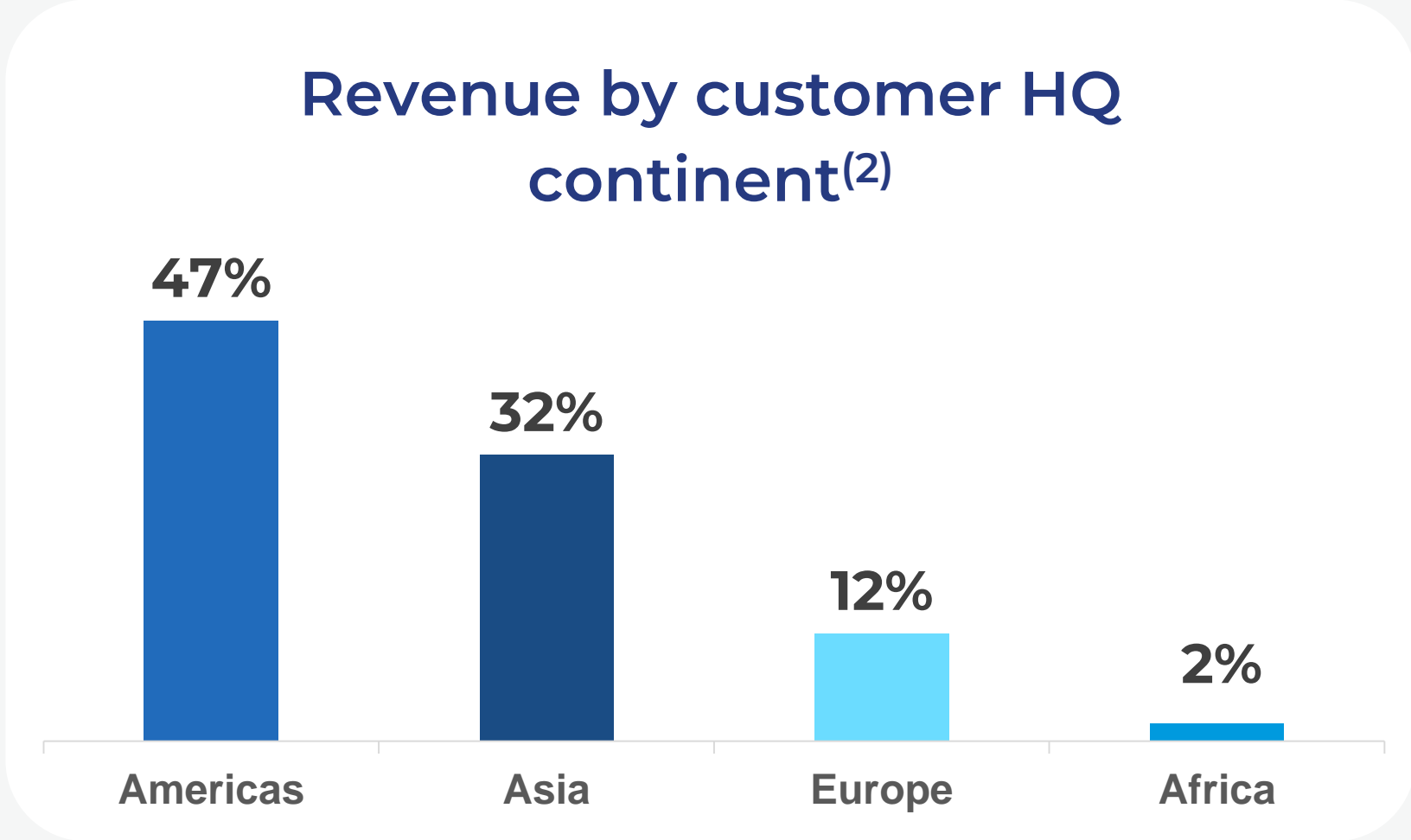
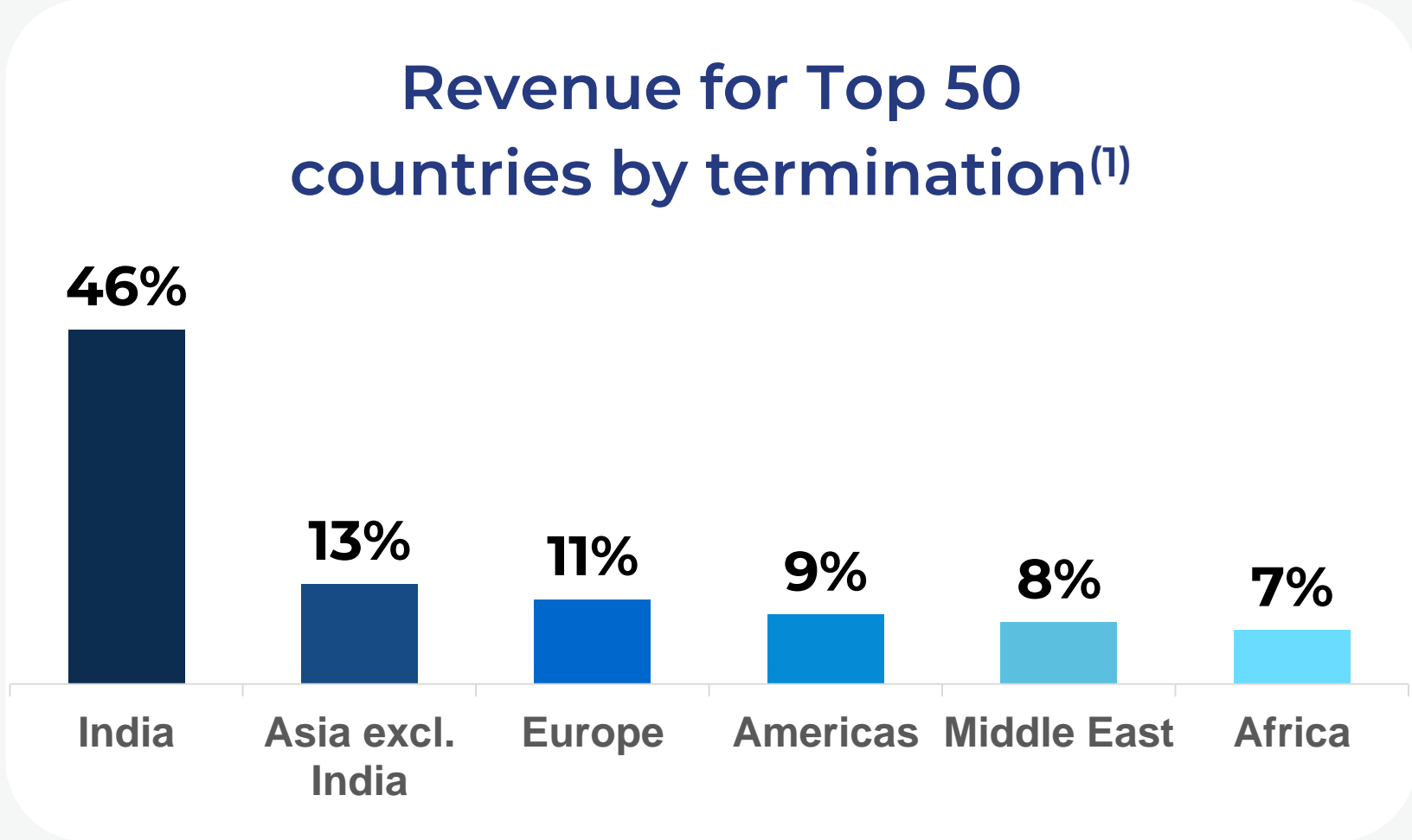
Diverse Customer Base



Revenue contribution from select industries in Q1 25-26



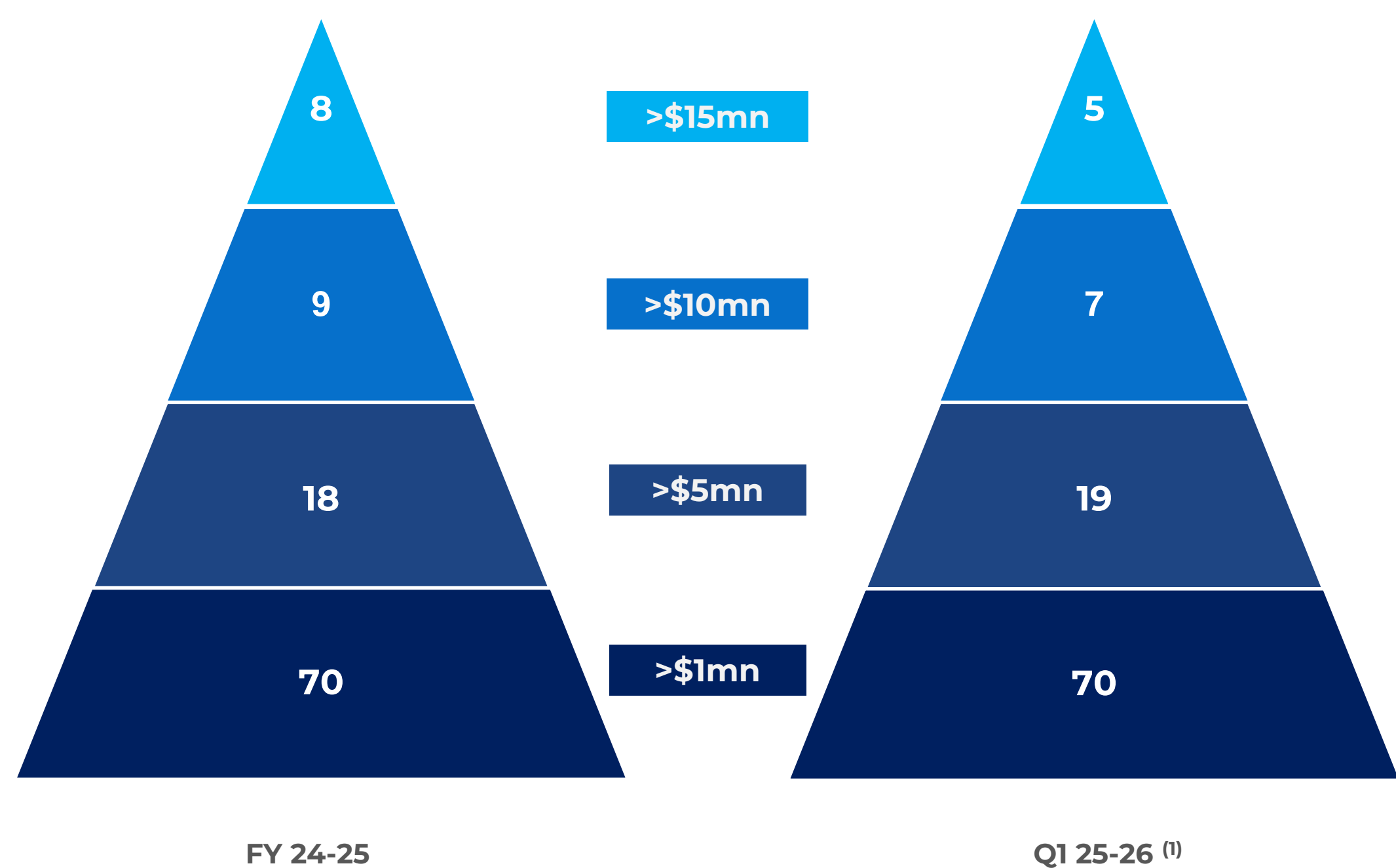
(1) Top 50 countries contribute c. 95% of Q1 25-26 revenue from operations
(2) Top 150 customers - contribute c. 92% of Q1 25-26 revenue from operations



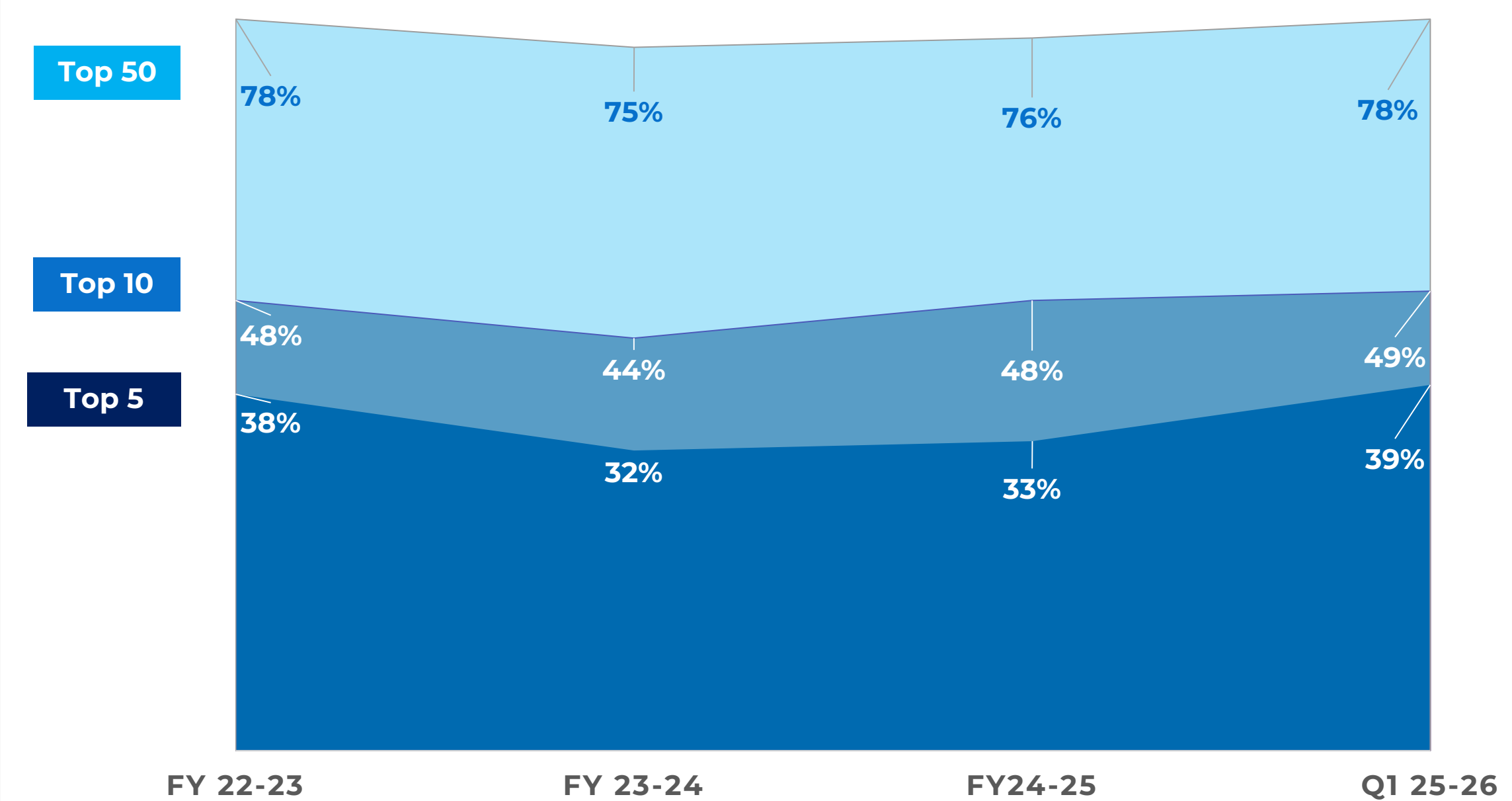
Customer Cohort Analysis



Clients by Account Size



Client Concentration



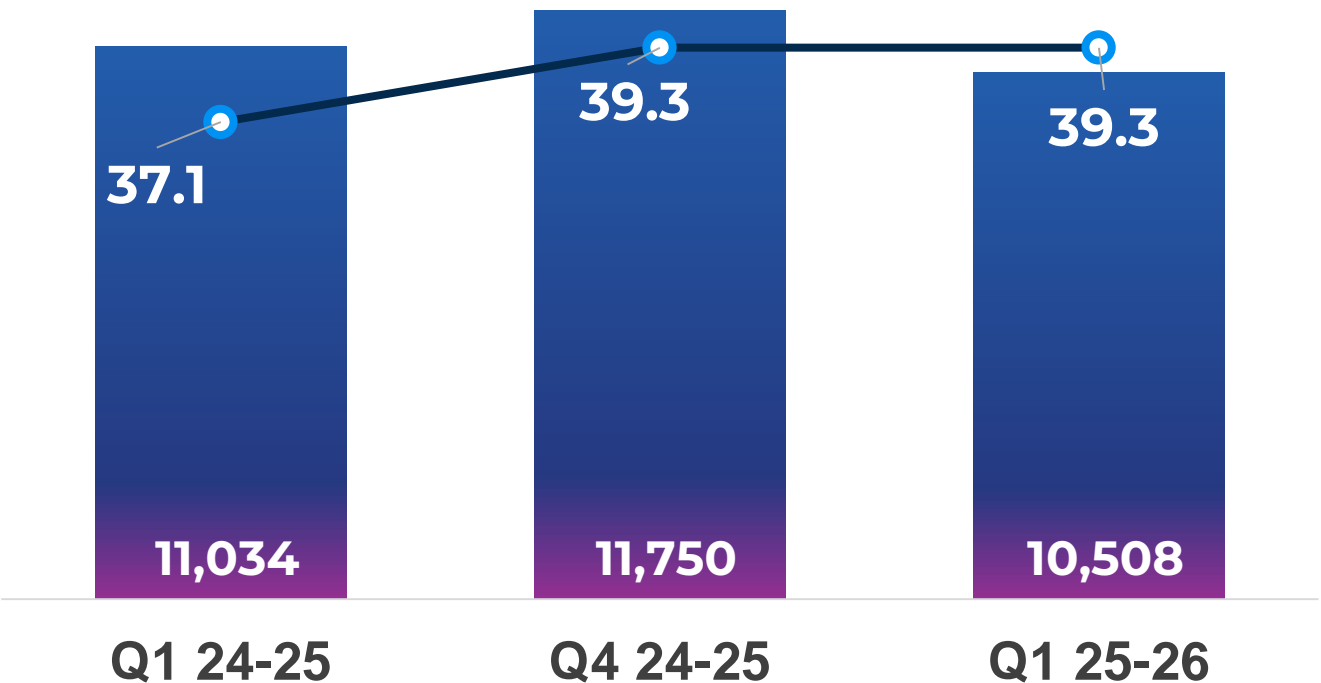
(1) 3M FY25-26 Annualized

Financial Highlights

Analysis of Q1 FY 25-26 Performance



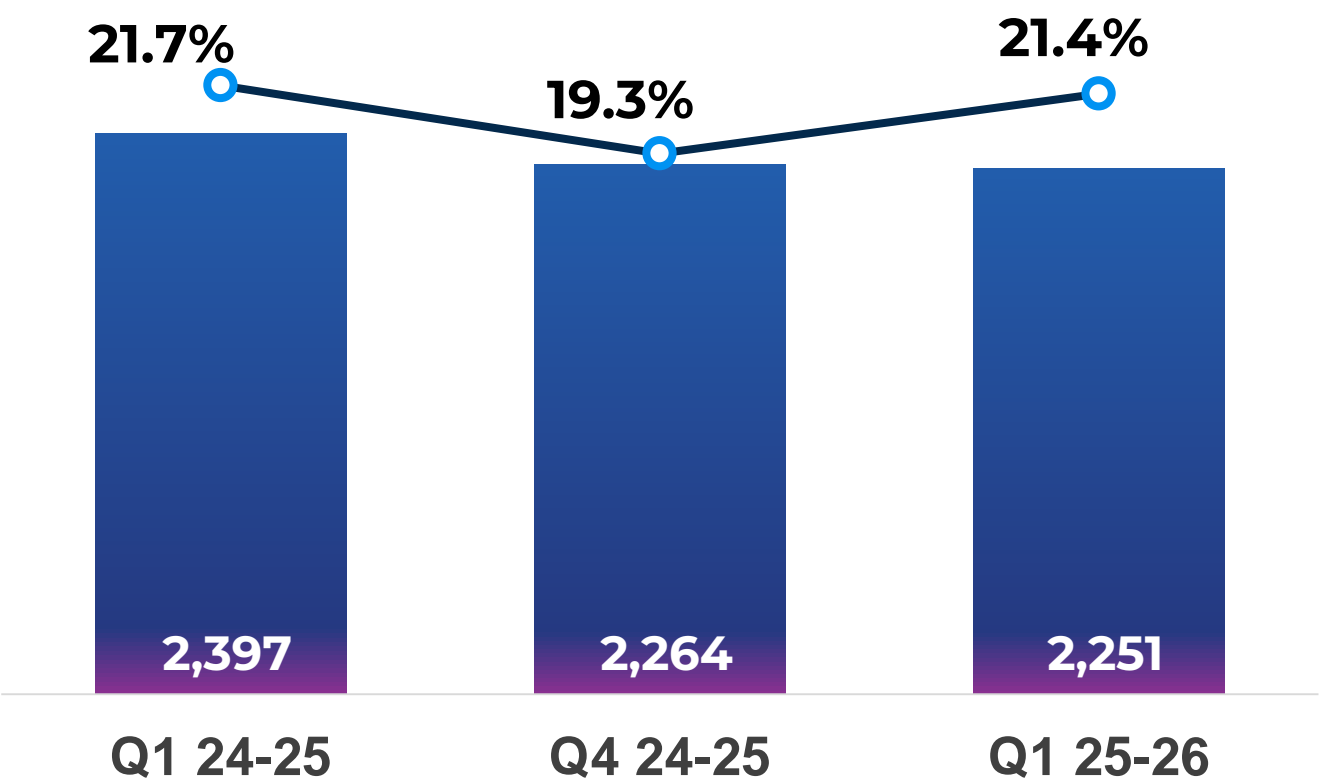
Revenue (in ₹ mn) & Billable Transactions (# bn)



Key factors impacting Q1 25-26 revenue performance

- Revenue declined by **4.8% Y-o-Y**, and **10.6% Q-o-Q**
- Growth in domestic volumes (at relatively lower realization) and routing synergies, partially offsets the decline in international business (Y-o-Y)
- One large Digital Native enterprise, structurally shifted to sourcing directly from MNOs in one country, impacting Q-o-Q and Y-o-Y revenue performance
- Decline in volumes from CPaaS aggregators, impacted performance Y-o-Y and Q-o-Q
- Q-o-Q performance was further impacted as certain low margin customer contracts were terminated

Gross Profit (In ₹ mn) & Gross Profit Margin (%)



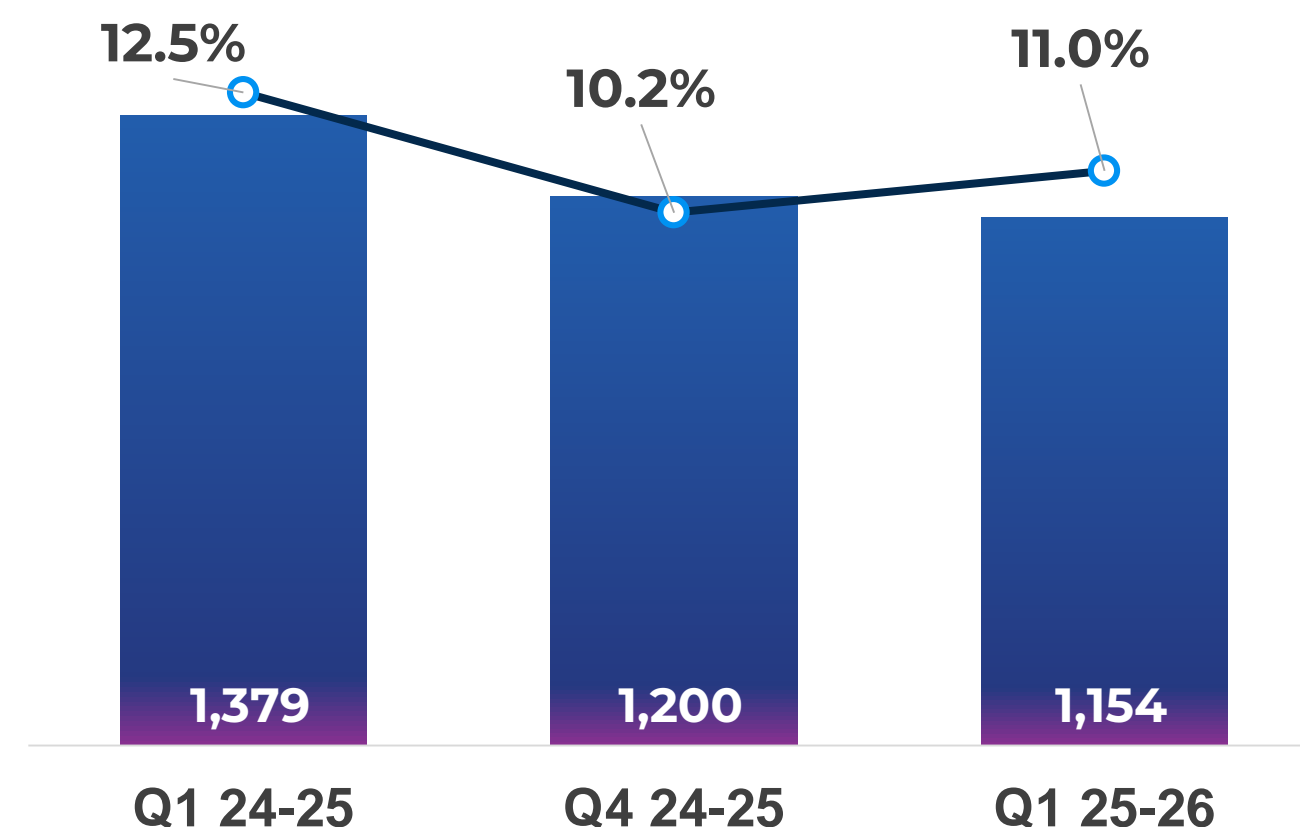
Trends in Gross Profit

- Gross Profit declined by **6.1% Y-o-Y** and **0.6% Q-o-Q**
- Gross Profit Margin expanded to **21.4% in Q1 25-26** vs. **19.3% in Q4 24-25**
- Gross Profit Margin expansion, despite revenue decline Q-o-Q and routing synergies, reflects the focus on retention of higher margin traffic

Analysis of Q1 FY 25-26 Performance (continued)



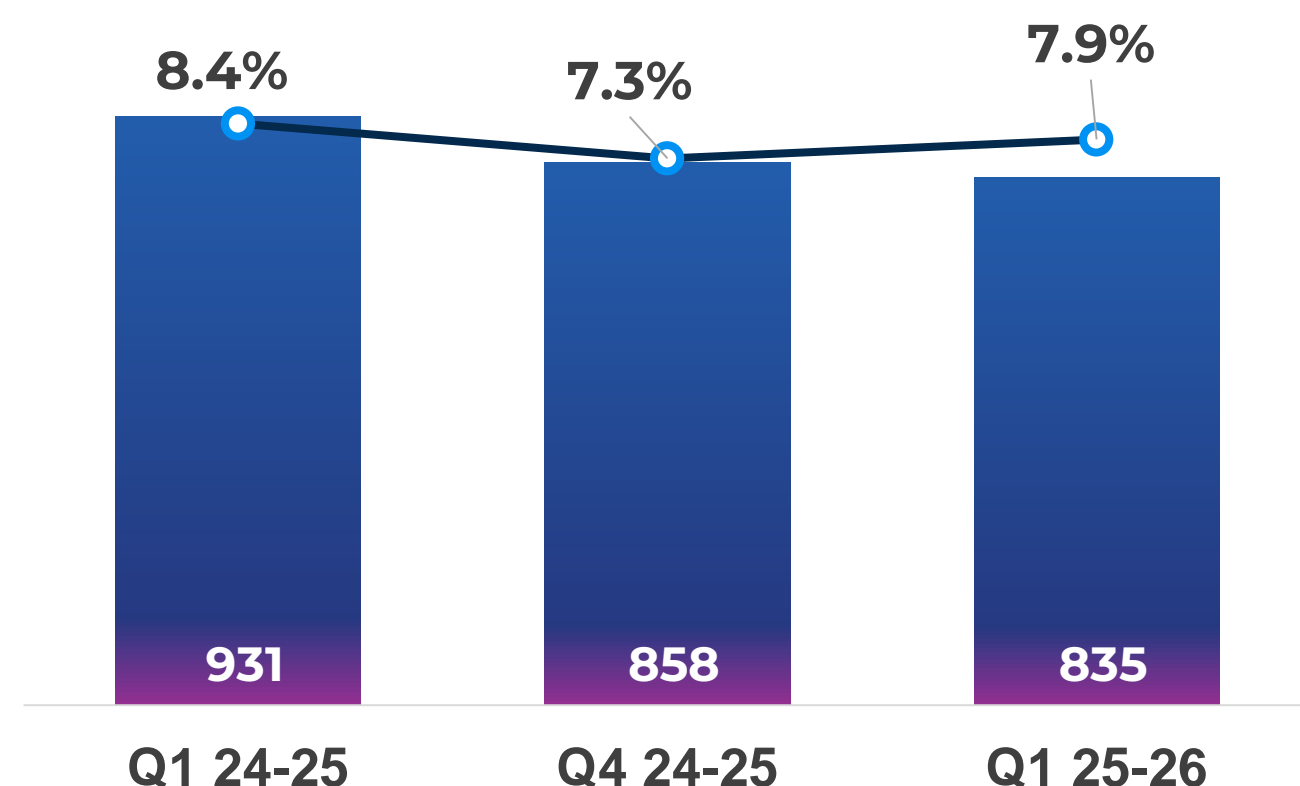
Adj. EBITDA⁽¹⁾ (In ₹ mn) & Adj. EBITDA Margin (%)



Adj. EBITDA analysis

- Adj. EBITDA declined by **16.3% Y-o-Y**, and **3.9% Q-o-Q**
- The decline in Gross Profit flowed through to Adj. EBITDA
- Increase in operating cost, adjusted for non-core items⁽³⁾, is contained to **+4% Y-o-Y** as salary increments and certain trade receivables written off are offset by non-recurrence of prior year one time incentives

Adj. PAT⁽²⁾ (In ₹ mn) & Adj. PAT Margin (%)



Factors impacting Adj. PAT

- Adjusted PAT declined by **10.3% Y-o-Y**, and **2.7% Q-o-Q**
- Adjusted PAT trend is in-line with EBITDA
- Effective tax rate increased from **21.1%** in Q1 24-25 to **23.2%** Q1 25-26

Adjusted EBITDA



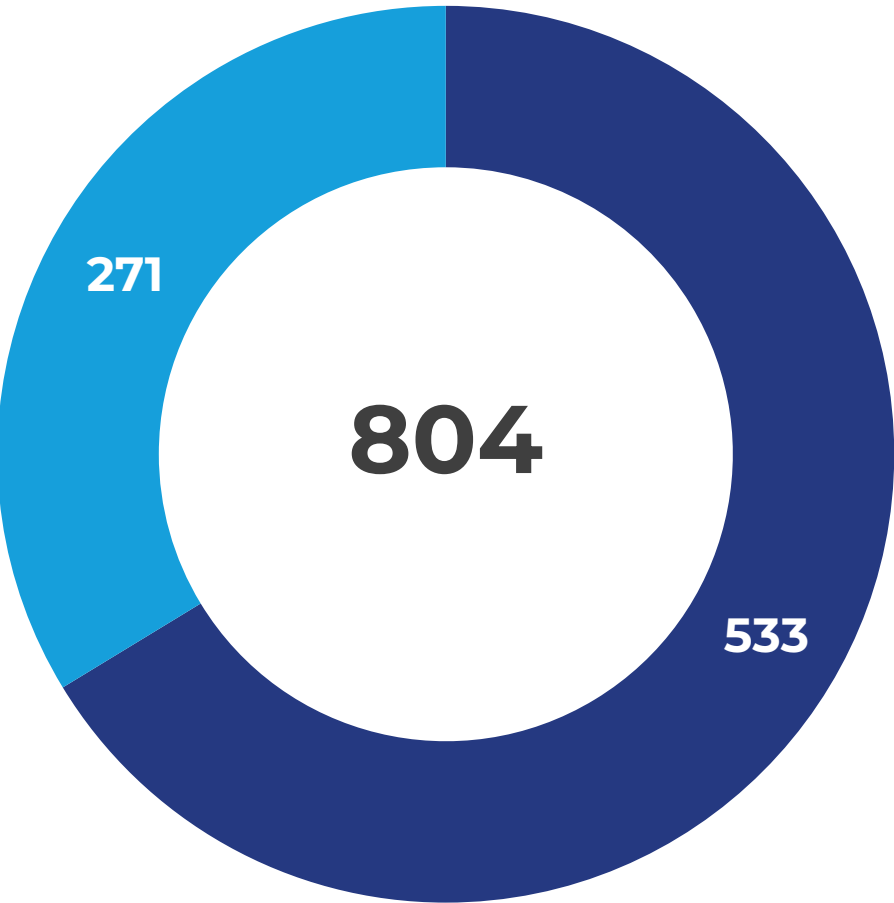
(In ₹ mn)	Quarter ended			Full year
	30.06.2025	31.03.2025	30.06.2024	31.03.2025
EBITDA	938.9	1,219.0	1,237.6	5,277.6
(+) Employee stock option expense (non cash)	5.7	5.6	12.1	31.1
(+) Net loss on foreign currency transactions and translation	247.3	8.3	119.3	-
(-) Intangible assets under development	38.0	32.5	28.7	108.2
(+) Non-cash impact related to refundable security deposit provided to MNO	-	-	38.8	38.8
Adjusted EBITDA (Non-GAAP)	1,153.9	1,200.4	1,379.1	5,239.3
EBITDA margin % on a Non-GAAP basis	11.0%	10.2%	12.5%	11.5%

(1) EBITDA = Profit before exceptional item minus (-) Other income plus (+) Finance cost and depreciation..
Management uses the non-GAAP financial information, collectively, to evaluate its ongoing operations and for internal planning and forecasting purposes. Non-GAAP financial information is presented for supplemental informational purposes only, should not be considered a substitute for financial information presented in accordance with Indian Accounting Standard (Ind AS), and may be different from similarly titled non-GAAP measures used by other companies.

Human Resource Capital



Location wise break-up

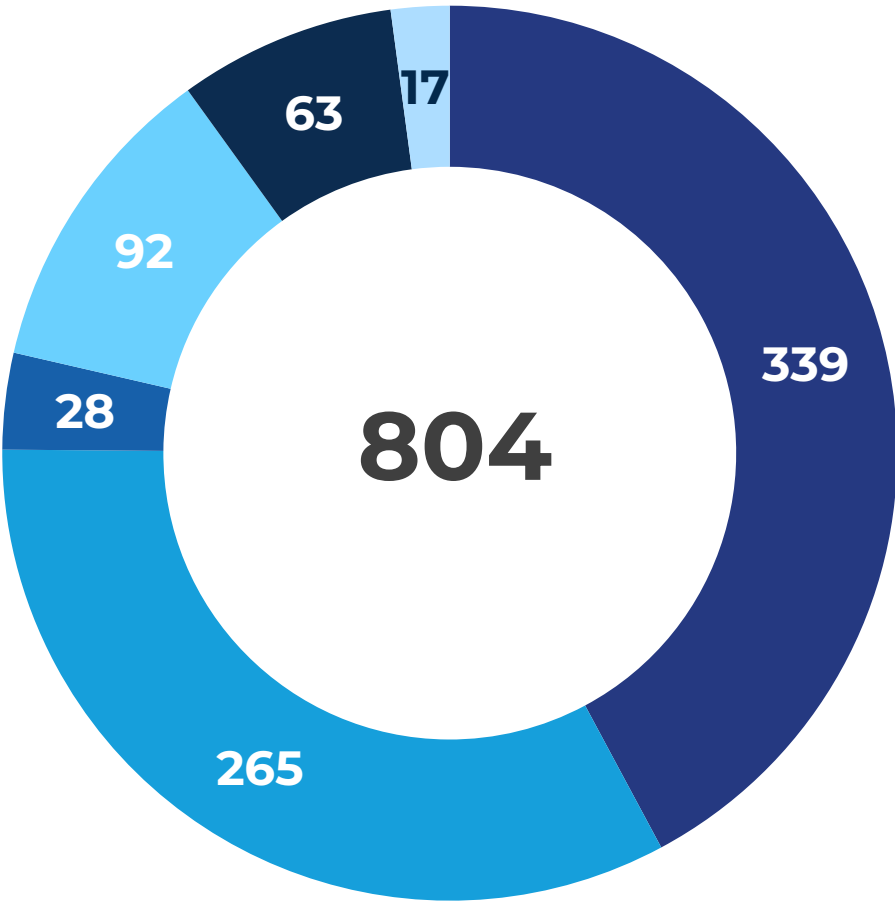


■ India ■ International

26 New Employees joined in Q1 FY25-26

63 Employees left in Q1 FY25-26

Function wise break-up



■ Tech & Tech Support
■ Sales & Marketing
■ Firewall & other operator solutions
■ General & Admin
■ Strategy, Accounts & Finance
■ Corporate-Business Heads

As on June 30, 2025, Employee information excludes Call2Connect



Thank You

www.routemobile.com

