31st January, 2025

National Stock Exchange of India Ltd.
Exchange Plaza, C – 1, Block G
Bandra-Kurla Complex, Bandra (E),
Mumbai-400 051
Symbol: UNIECOM

BSE Limited
Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai 400 001
Scrip Code: 544227

Subject: Update under Regulation 30 of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015 ('SEBI Listing Regulations')

Reference: Audited (Standalone & Consolidated) Financial Results for the quarter & nine month ended on 31st December, 2024.

Dear Sir/Madam,

Pursuant to Regulation 30 of SEBI Listing Regulations, as amended from time to time, an in continuation to our earlier communication sent on 29th January, 2025.

Please find enclosed the Investor Presentation for the Audited (Standalone & Consolidated) Financial Results for the quarter and nine month ended on 31st December, 2024.

The same is available on the website of the Company at https://unicommerce.com/

You are requested to kindly take the abovementioned on record.

Thanking you.

For UNICOMMERCE ESOLUTIONS LIMITED

kapil makhija

Digitally signed by kapil makhija
DN: c=IN, o=Personal, pseudonym=z64k59qfn0wv3jpoh1cl7imbsxr daegt, 2.5.4.20=2bd4ea4d51de62d767ea4881937fcd54136c78129cc524fcef71848b8eb10d82, postalCode=121006, st=Haryana, serialNumber=2a066070477c9888fa8386fed32d8be808b86aff93f3cacfb5dd6e25a3f80c3, cn=kapil makhija
Date: 2025.01.31 20:13:57 +05'30'

Name: Kapil Makhija
Designation: Managing Director & CEO
DIN: 07916109
Address: Sector 44, Gurugram, Haryana
Encl: As above

unicommerce

Simplifying E-Commerce

Investor Presentation - Q3 FY25

One Stop for All E-Commerce Automation Needs

From Click To Delivery

Convertway

Increase Sales

unware

Streamline Operations

Shipway

Reduce Costs

Disclaimer

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financial situation of any person.

Agenda

- Company Overview
- Advantage Unicommerce
- Business Updates

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Unicommerce simplifies eCommerce by automating brand's and retailer's operations across the eCommerce order journey

eCommerce Order Journey

Pre-Purchase | **Post-Purchase**

Customer Engagement Layer (Front-end)

Brands interacts with consumer through this layer

Order placement, **Marketing Automation,** Checkout Optimisation, Payments etc.

Transaction Processing Layer (Nerve Centre)

Brand receives and processes the order for shipment

Facility & Courier Allocation, Inventory Mgmt. & Order Processing

Order Fulfilment Layer

The order is shipped and delivered to the consumer

Order Tracking, Courier Aggregation, Reconciliation, Delivery Operations

Unicommerce is India's largest eCommerce enablement SaaS platform in the transaction processing layer by revenue[1]

Source: 1. For FY 23 revenue as per Redseer Report

With Shipway Technology's acquisition, Unicommerce provides SaaS solutions across the full-stack of eCommerce enablement

unicommerce

Customer Engagement Layer	Transaction Processing Layer	Order Fulfilment Layer
Convertway by unicommerce	unware	Shipway by unicommerce
Marketing Automation Platform	**Order Processing Platform**	**Logistics Management Platform**
110 Mn+ *Annual Notifications Run-Rate*[1]	***1,036 Mn+*** *Annual Transaction Run-Rate*[2]	***11,860+*** *Client Facilities*[3]	***7 Mn+*** *Annual Shipments Run-Rate*[1]

Note: 1) For Shipway and Convertway, the average daily shipments or notifications have been taken into account from the transaction date 17th Nov'24 to 31sr Dec'24 and multiplied by 365 to arrive at the annualised run-rate; Numbers included are on a limited review basis 2) Invoice items processed in Q3 FY 25 multiplied 4; 3) Includes both warehouses and stores

We provide an extensive suite of products to simplify eCommerce for brands and sellers

unicommerce

Customer Engagement Layer

Convert way by unicommerce

- Marketing Automation (Whatsapp/SMS)
- Live Whatsapp Chatbot
- User List Creation
- Targeted Campaigns
- Smart Customer Segmentation

Transaction Processing Layer

unware

- Order Management System
- Warehouse & Inventory Management System
- Omnichannel Retail Solution
- Seller Management Panel
- UniReco

Order Fulfilment Layer

Shipway by unicommerce

- Courier Aggregation
- NDR Management
- RTO Reduction Suite
- Branded Tracking Page
- Shipping, Return & Exchange Automation

Detailed Analytics and Reporting Across the eCommerce Order Journey

Marquee clients base uses Unicommerce's eCommerce Stack

7,000+[1] Clients

Fashion, Footwear & Accessories

lenskart, fabindia, TCNS CLOTHING CO. LTD, BESTSELLER, HIDESIGN, bummer, Bewakoof, Paragon, VIP, hummel, TIMEX, Libas

Beauty, Personal Care & FMCG

mamaearth, WOW SKIN SCIENCE, DOT & KEY SKINCARE, SUGAR, plum, Clinikally, mamaearth, caffeine, juicy chemistry, BEARDO, THE MAN COMPANY

Pharma, Nutrition & Medical

OZiva, GNC, HEALTHKART, True Elements

Home & Services

Urban Company, flo, BLUE STAR, cello, Ugaoo, Symphony

Electronics

PORTRONICS, boAt, SENNHEISER

Brand aggregators & house of brands

G.O.A.T BRAND LABS, iconic, MENSA HOUSE OF BRANDS, upscalio, TMRW

International

LANDMARK GROUP, REDTAG., edamama, RSA GLOBAL

....and more

Note: 1. As of Q3 FY25; Logos displayed are for representation purposes only and remain the property of their respective owners.

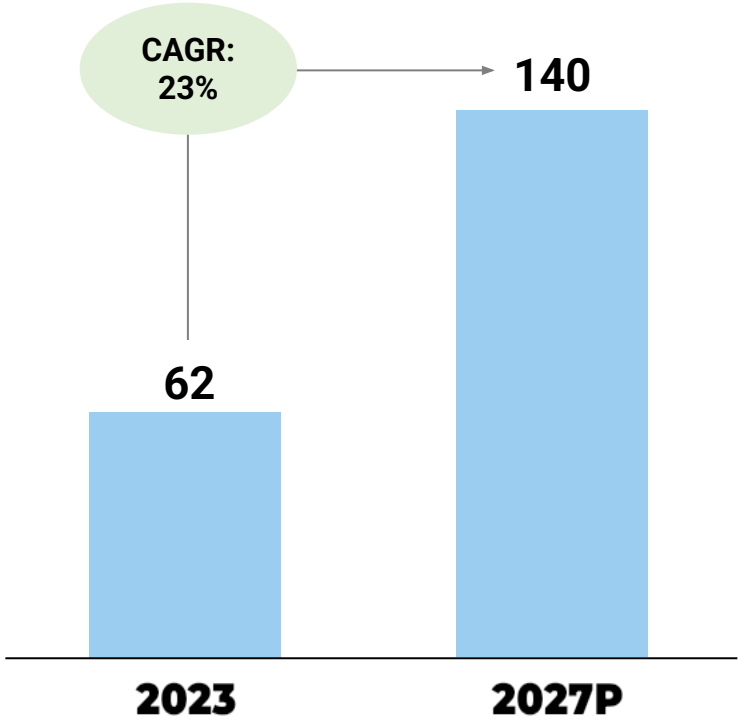
Agenda

- Company Overview
- **Advantage Unicommerce**
- Business Updates

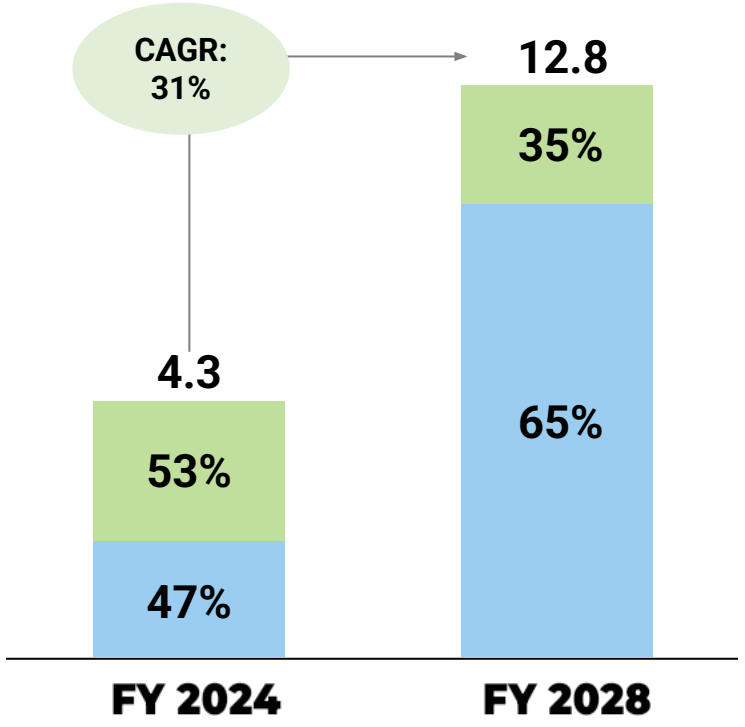
Fast-growing Indian eCommerce presents substantial growth opportunity; TAM expanded further by Shipway's acquisition

Growth Drivers – Core Products in India[1]

eCommerce Market ($ Bn)



eCommerce Shipments (Bn)



Unicommerce processed ~20-25% of India's eCommerce dropship volumes during 2023

Total Addressable Market, 2024[1]

$1,150+ Mn of combined TAM[4]

- **$260 Mn** — Market for core products
- \+
- **$420 Mn** — Market for complementary product offerings[2]
- \+
- **$470+ Mn** — Market for Courier Aggregation[3]

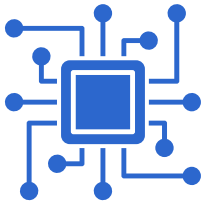
Notes: 1. Source: Redseer Report 2. Expansion of product portfolio into complementary product offerings, opportunity to build products in adjacencies across the eCommerce order journey and up-sell / cross-sell them to clients 3) Internal estimate for courier aggregation market INR 3,800-4,300 Crore; 4. Marketing Automation TAM is over and above the current combined TAM

Unicommerce is well-placed to win the market

1

Comprehensive, One-Stop eCommerce Enablement Platform

2



Scalable Technology Platform with 270+ Seamless Integrations

3

Strong Network Effects with Sticky Customer Relationships

Feature-rich, proprietary technology platform makes Unicommerce a *preferred choice for customers* and has created a *strong right to win in the market for us*

Unicommerce has a comprehensive suite of eCommerce solutions with new additions of capabilities from Shipway & Convertway …

One Stop eCommerce Enabler

Single platform for all eCommerce enablement use cases through continuous product suite enhancement

Customer Centric Approach

With a **long-established customer base,** actively exchange industry trends and **collaborate on new feature developments**

Leverage Existing Client Base

Drive **incremental revenue** through **cross selling** of new products

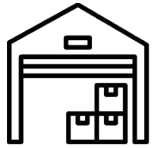
Our vision is to leverage our leading industry position to be the one-stop eCommerce enablement platform

… to automate order processing, warehouses, inventory, couriers and marketing for eCommerce businesses

Convertway + Uniware + Shipway = One stop eCommerce enabler to simplify eCommerce and accelerate growth for eCommerce brands and sellers

Customer Engagement Layer → **Transaction Processing Layer** → **Order Fulfillment Layer**

From Click



To Delivery

Convertway by unicommerce

Increase Sales

(SMS & Whatsapp Mktg Automation, Chatbots)

Uniware

Streamline Operations

(OMS, WMS, Omni-RMS, Seller Panel, UniReco)

Shipway by unicommerce

Reduce Costs

(Shipping Aggregation, Shipping Automation)

Strong and growing network with 270+ plug & play integrations

270+ Technology & Partner Integrations

142 Marketplaces & Webstores[1]

Flipkart, snapdeal, meesho, shopify, NYKAA

....and more

Update latest inventory across sales channels and processes incoming orders through a **unified workflow**

118 Logistics Partners[1]

DELHIVERY, XPRESSBEES

....and more

Automate order pick-up and other 3PL-related processes

11 ERPs and POS systems[1]

GINESYS, WONDERSOFT THE WAY TO GROW, LOGIC ERP RETAIL | DISTRIBUTION | MANUFACTURING

....and more

Enable automated transfer of transactional information

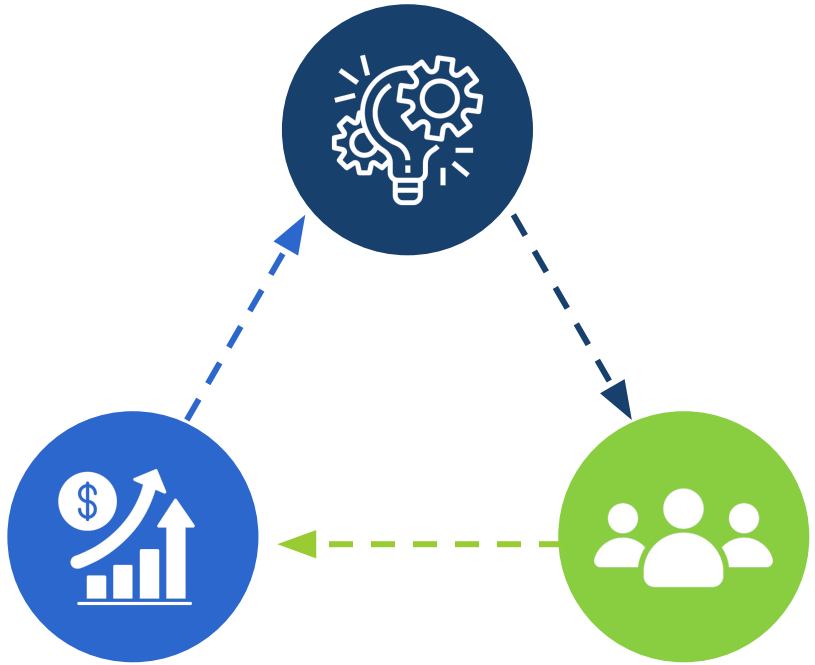
Wide range of seamless integrations makes us an integral part of the client's tech stack

Notes: 1. As of Q3 FY25

Strong network effects driving growth

Robust product, extensive integrations, expanding sticky client relationships are boosting network effects, economies of scale

Scalable Technology With Feature Rich Product Portfolio & Integrations



Feature rich product portfolio and more integrations drive more clients and order volume

More clients and usage drives more revenue and growth

Steady revenue growth and operating leverage drives profitability empowering us to innovate and expand our product portfolio

Case Studies

4.9 Mn+ live inventory managed with a 72% drop in returns for a women's wellness brand using Uniware

Problem Areas

- Unified platform for B2C and B2B operations
- Manage 450+ SKUs with support for ad-hoc bundling
- Optimize order allocation & routing for fast processing
- Centralized reporting for streamlined monitoring
- Single invoice for mixed-product orders
- Real-time cart updates to downstream systems

Use Cases Implemented

- Single-window OMS for real-time B2B and B2C Orders
- Advanced bundling and expiry management
- Efficient routing with 30+ allocation rules
- Customized reporting with tally integration
- Specialized invoice template for mixed SKUs
- Custom Magento integration
- Custom fields to capture customer plan details

Scale Managed	**4.9 Mn+** Live Inventory Count	**6+** Warehouses Managed
Operational Impact	**58%** Drop in SLA Breach Rate	**72%** Drop in Customer Return Rate
Growth Impact	**7x** Growth in Catalog Count	**3x** Growth in Order Items

42% drop in customer returns for a renowned apparel brand with 1 Mn orders processed over a year using Shipway

Problem Areas

- Inefficient order allocation across warehouses
- Higher costs from inefficient carrier selection
- Limited real-time order tracking for end consumers
- Increased customer support queries
- High return-to-origin (RTO) / customer return rates impacting profits

Use Cases Implemented

- Automated courier allocation to optimize delivery and reduce shipping costs
- Real-time shipment tracking and updates to reduce customer inquiries and RTOs
- Streamlined Non-Delivery Report (NDR) management with automated WhatsApp and SMS follow-ups
- Customizable workflows tailored to operational needs

Scale Managed	**1.0 Mn+** Orders Managed	**29,000+** Pincodes Served	
Operational Impact	**42%** Drop in Courier Return Rate	**70%+** Drop in Customer Tickets	**10%** Drop in Logistics Costs
Growth Impact	**63%** Increase in Order Volume		

INR 5.6 Mn+ additional revenue generated monthly for a sexual wellness brand with a low-cost campaign using Convertway

Convertway by unicommerce

Problem Areas

- Low conversion of website traffic into paying customers
- Difficulty collecting visitor database
- High cart abandonment leading to revenue loss
- Low ROI from SMS marketing campaigns
- Challenges in automating basic welcome and cart abandonment campaigns

Use Cases Implemented

- Implemented gamification to effectively grow the potential buyer list
- Deployed abandoned cart flows to recover lost revenue from uncompleted purchases
- Optimized SMS campaigns to improve ROI
- Streamlined processes for welcome messages, abandoned cart reminders through automation

Scale Managed	**4.9 Mn+** Notifications Sent	**1.0 Mn+** Monthly Website Visitors	
Growth Impact	**INR 5.6 Mn+** Additional Revenue Generated Monthly[1]	**15%** Subscriber List Growth	**2.5X** Campaign ROI Generated

Notes: 1. Average monthly revenue generated for Q3 FY25

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Management Commentary

Kapil Makhija
MD & CEO

"We are pleased to report a strong YoY performance for both Q3 FY25 and 9M FY25, demonstrating our strong momentum.

This quarter, we continued expanding our enterprise client base, onboarding marquee brands such as Hidesign and Hummel while strengthening our engagement with existing clients like SUGAR Cosmetics. Our platform usage has seen a steady rise, achieving an annualized run rate of over 1 billion order items processed, reflecting the increasing adoption of our solutions.

Our strategic acquisitions of Shipway and Convertway have strengthened our position as a leading e-commerce enablement platform. With a combined customer base of 7,000+ across the three platforms, we are unlocking upsell and cross-sell opportunities, further enhancing the value we deliver across the e-commerce ecosystem.

As India's eCommerce market expands, we are well-positioned to capitalize on this opportunity. With our differentiated offerings, we remain confident in Unicommerce's ability to drive sustained growth and profitability."

Anurag Mittal
CFO

"In Q3 FY25, including the Shipway acquisition effective December 17, 2024, our revenue grew by 26.1% YoY, reaching INR 327.4 Mn. For 9M FY25, revenue increased 16.2% YoY to INR 895.2 Mn, reflecting our consistent expansion.

Strong operating leverage in our business led to significant profitability improvements. Adjusted EBITDA for Q3 FY25 increased by 63.5% YoY to INR 88.8 Mn, while for 9M FY25, it grew 42.7% YoY to INR 195.1 Mn. Our Adjusted EBITDA margin expanded by 620 bps YoY to 27.1% in Q3 FY25 and by 405 bps YoY to 21.8% for 9M FY25.

Additionally, Profit After Tax (PAT) saw a strong growth of 62.3% YoY, reaching INR 62.9 Mn in Q3 FY25, while 9M FY25 PAT grew 39.3% YoY to INR 142.8 Mn.

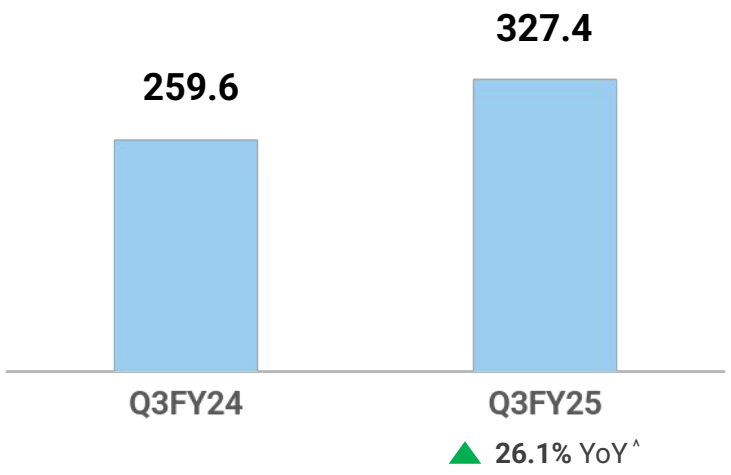
With the expansion of our product offerings, continued operational efficiencies and inherent operating leverage, we are committed to delivering long-term value to our stakeholders while sustaining profitable growth."

Q3 FY25 – P&L Highlights
26%+ YoY Revenue growth and 62%+ PAT growth

xx% Margins%

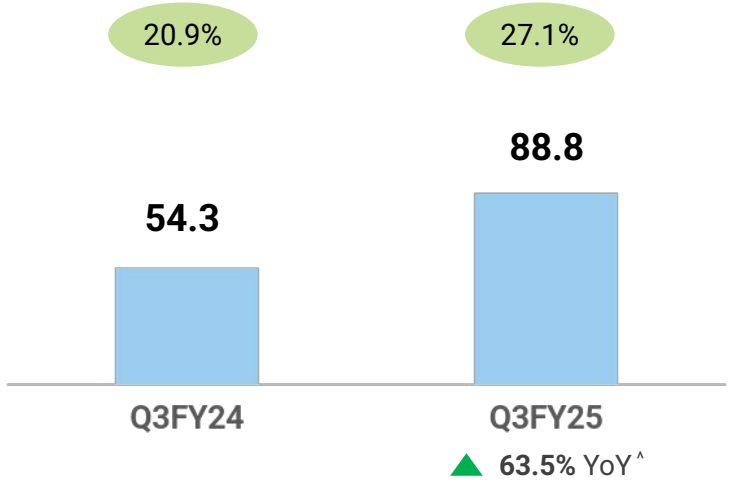
Revenue

INR (Mn)



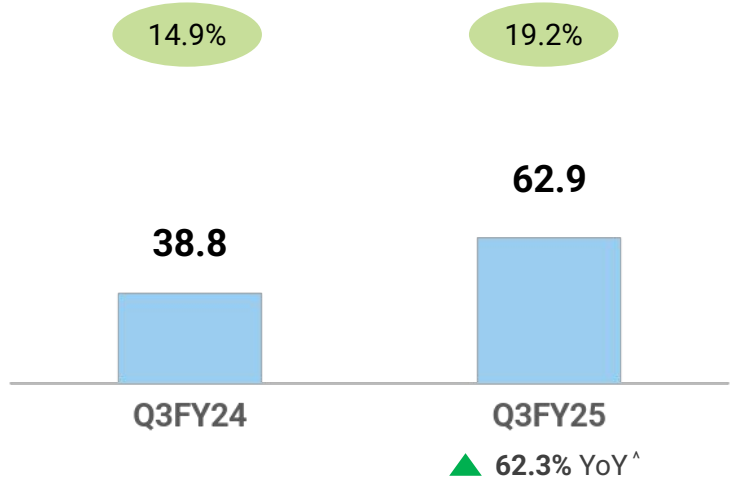
Adjusted EBITDA[1]

INR (Mn)



Profit After Tax

INR (Mn)



We believe, below are the growth drivers for us:

- Share of revenue for the consumer industry from ecommerce channel has been consistently increasing. Company's revenues are linked to the number of transactions. With the number of transactions growing, this would help the Company to grow its business further. China did ~130+ Bn shipments[2] in 2023 whereas India did ~4.3 Bn shipments[3] in FY24, highlighting a significant headroom for growth for us going ahead
- The eCommerce industry is currently underpenetrated, and there is large scope for the company to add to its existing client base
- Company continues to work on new use cases and therefore the new products launch will be key driver of growth
- Company has identified new geographies wherein the product can be marketed to attract new customers

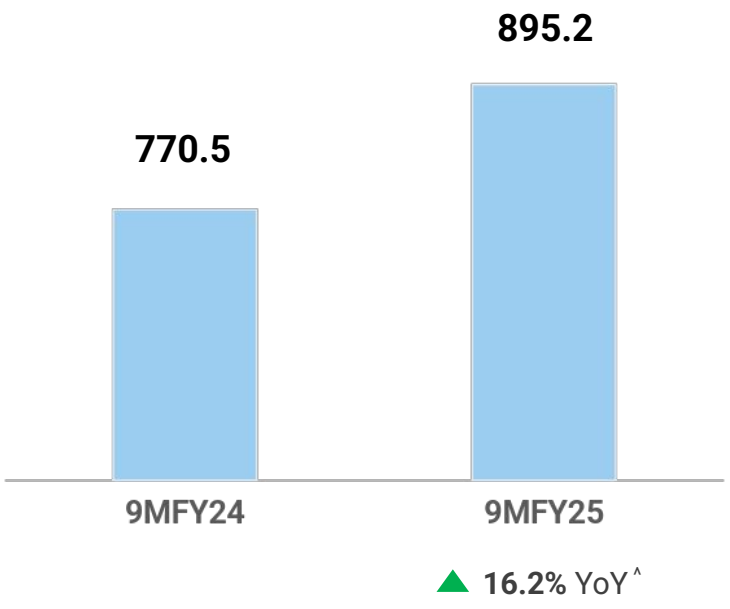
Notes: Consolidated financials includes subsidiary (Shipway Technology) financials for 15 days (17th Dec'24 to 31st Dec'24); ^YoY compares Q3FY25 with Q3FY24; (1) Adjusted EBITDA has been arrived at by adding share-based payment expenses (part of employee benefits expenses) to EBITDA. EBITDA refers to earning before interest, taxes, depreciation and amortisation which has been arrived at by adding total tax expense, finance cost, depreciation and amortisation expense and reducing other income to the PAT (2) China Federation of Logistics and Purchasing (CFLP), Global Times, Jan-2024 (3) Redseer Report

9M FY25 – P&L Highlights
16%+ YoY Revenue growth and 39%+ PAT growth

xx% Margins%

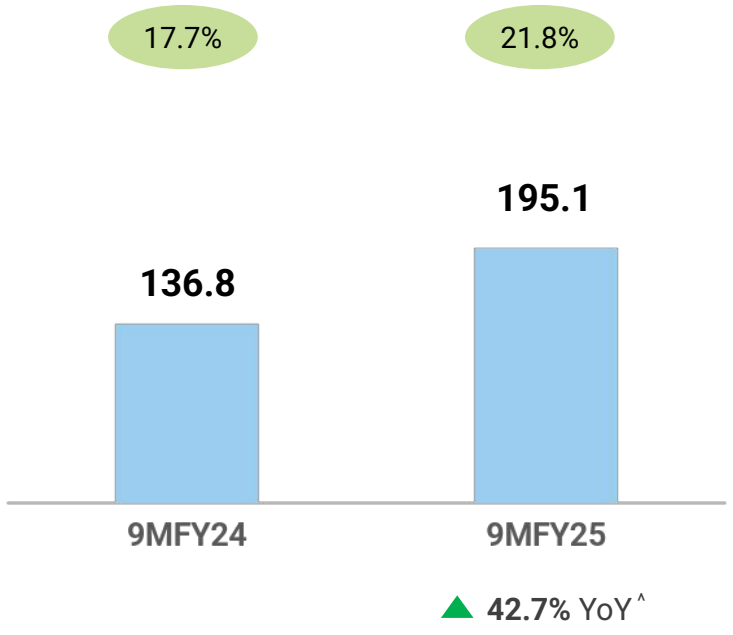
Revenue

INR (Mn)



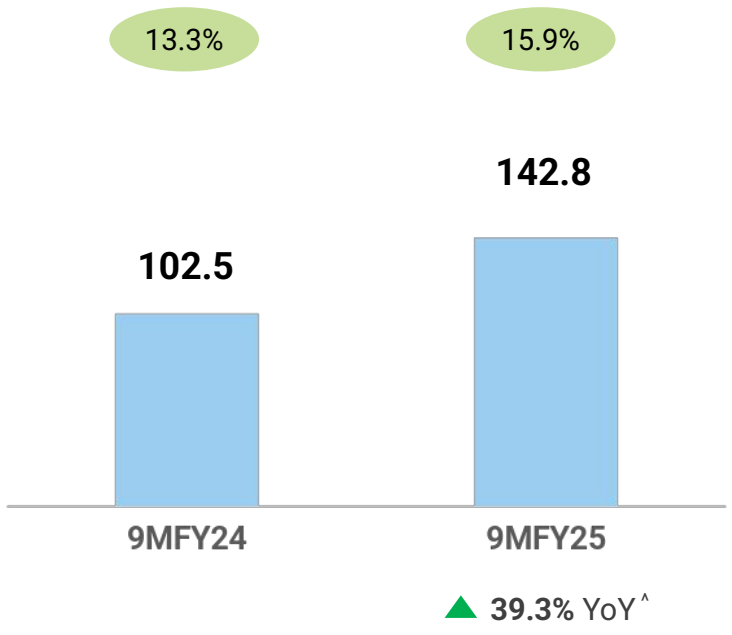
Adjusted EBITDA[1]

INR (Mn)



Profit After Tax

INR (Mn)



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Appendix

Key Performance Indicators

Key Performance Indicators – Q3 FY25

Financial numbers in INR Million

KPIs^	Q3 FY25	Q2 FY25	Q3 FY24	QoQ Growth	YoY Growth
Revenue from contract with customers[1]	327.4	293.1	259.6	11.7%	26.1%
Total Income	342.4	306.0	276.6	11.9%	23.8%
Total Expense	256.8	245.8	224.4	4.5%	14.4%
Gross Margin%[2]	72.8%	78.6%	78.6%	(581 bps)	(578 bps)
Adj. EBITDA[6]	88.8	61.7	54.3	44.0%	63.5%
Adj EBITDA Margin%[7]	27.1%	21.0%	20.9%	608 bps	620 bps
EBITDA[4]	83.3	57.1	45.5	45.7%	82.9%
EBITDA Margin%[5]	25.4%	19.5%	17.5%	594 bps	789 bps
PBT	85.6	60.1	52.1	42.3%	64.2%
PBT Margin%[3]	26.1%	20.5%	20.1%	562 bps	606 bps
PAT	62.9	44.7	38.8	40.6%	62.3%
PAT Margin%	19.2%	15.3%	14.9%	395 bps	428 bps
Annual Recurring Revenue[8]	1,309.6	1,172.3	1,038.2	11.1%	26.1%
Total Enterprise Clients (in Nos.)[#]	934	904	782	3.3%	19.4%
Revenue per Employee[9#]	3.3	3.3	3.3	-	-
Number of items processed (in Mn)[#]	259.1	232.8	225.3	11.3%	15.0%
Share of Revenue from Top 10 Clients (%)[#]	20.4%	21.6%	25.5%	(118 bps)	(514 bps)

Notes: ^Unaudited & basis management of accounts (1) Revenue from contract with customers is total revenue generated by our Company from SaaS income, excluding other income sources. (2) Gross margin percentage represents the margin generated by the business after deducting the direct costs incurred to serve the clients, divided by revenue from contract with customers during the respective period / year. Direct costs include server hosting expense, software services and support cost attributable to business operation. (3) Restated Profit Before Tax Margin % represents Restated Profit Before Tax as a % of revenue from contract with customers for the respective period / year.(4) EBITDA refers to earning before interest, taxes, depreciation and amortisation which has been arrived at by adding total tax expense, finance cost, depreciation and amortisation expense and reducing other income to the restated profit for the period / year. (5) EBITDA Margin % represents EBITDA as a % of revenue from contract with customers for the respective period / year. (6) Adjusted EBITDA represents adjusted earnings before interest, taxes, depreciation and amortisation which has been arrived at by adding share-based payment expenses (part of employee benefits expenses) to EBITDA. EBITDA refers to earning before interest, taxes, depreciation and amortisation which has been arrived at by adding total tax expense, finance cost, depreciation and amortisation expense and reducing other income to the restated profit for the period / year. (7) Adjusted EBITDA Margin % represents Adjusted EBITDA as a % of revenue from contract with customers for the respective period / year. (8) Annual Recurring Revenue ("ARR") is defined as revenue from contract with customers in the most recent quarter of the respective periods multiplied by 4. (9) Revenue from contract with customers / employee represents revenue from contract with customers divided by the average number of employees for the respective periods. For quarter periods, the ratio has been calculated on the basis of annualised revenue from contract with customers for the given period / year; (#) KPIs relate to Uniware platform only

Key Performance Indicators – 9M FY25

Financial numbers in INR Million

KPIs^	9M FY25	9M FY24	FY24	YoY Growth
Revenue from contract with customers[1]	895.2	770.5	1,035.8	16.2%
Total Income	938.6	817.1	1,094.3	14.9%
Total Expense	745.4	680.2	919.6	9.6%
Gross Margin%[2]	76.4%	78.4%	78.5%	(192 bps)
Adj. EBITDA[6]	195.1	136.8	181.6	42.7%
Adj EBITDA Margin%[7]	21.8%	17.7%	17.5%	405 bps
EBITDA[4]	182.4	107.8	144.2	69.2%
EBITDA Margin%[5]	20.4%	14.0%	13.9%	639 bps
PBT	193.1	136.9	174.8	41.1%
PBT Margin%[3]	21.6%	17.8%	16.9%	381 bps
PAT	142.8	102.5	131.2	39.3%
PAT Margin%	15.9%	13.3%	12.7%	265 bps
Annual Recurring Revenue[8]	1,309.6	1,038.2	1,060.0	26.1%
Total Enterprise Clients (in Nos.)[#]	934	782	795	19.4%
Revenue per Employee[9#]	3.2	3.3	3.2	(1.9%)
Number of items processed (in Mn)[#]	704.7	574.4	772.3	22.7%
Share of Revenue from Top 10 Clients (%)[#]	20.1%	28.4%	27.4%	(833 bps)

Notes: ^Unaudited & basis management of accounts (1) Revenue from contract with customers is total revenue generated by our Company from SaaS income, excluding other income sources. (2) Gross margin percentage represents the margin generated by the business after deducting the direct costs incurred to serve the clients, divided by revenue from contract with customers during the respective period / year. Direct costs include server hosting expense, software services and support cost attributable to business operation. (3) Restated Profit Before Tax Margin % represents Restated Profit Before Tax as a % of revenue from contract with customers for the respective period / year.(4) EBITDA refers to earning before interest, taxes, depreciation and amortisation which has been arrived at by adding total tax expense, finance cost, depreciation and amortisation expense and reducing other income to the restated profit for the period / year. (5) EBITDA Margin % represents EBITDA as a % of revenue from contract with customers for the respective period / year. (6) Adjusted EBITDA represents adjusted earnings before interest, taxes, depreciation and amortisation which has been arrived at by adding share-based payment expenses (part of employee benefits expenses) to EBITDA. EBITDA refers to earning before interest, taxes, depreciation and amortisation which has been arrived at by adding total tax expense, finance cost, depreciation and amortisation expense and reducing other income to the restated profit for the period / year. (7) Adjusted EBITDA Margin % represents Adjusted EBITDA as a % of revenue from contract with customers for the respective period / year. (8) Annual Recurring Revenue ("ARR") is defined as revenue from contract with customers in the most recent quarter of the respective periods multiplied by 4. (9) Revenue from contract with customers / employee represents revenue from contract with customers divided by the average number of employees for the respective periods. For quarter periods, the ratio has been calculated on the basis of annualised revenue from contract with customers for the given period / year; (#) KPIs relate to Uniware platform only

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Financials

P&L – Quarterly

(Consolidated numbers In INR Million)

Particulars	For the quarter ended December 31, 2024 (Audited)	For the quarter ended September 30, 2024 (Audited)	For the quarter ended December 31, 2023 (Unaudited)	For the year ended March 31, 2024 (Audited)
Income				
Revenue from contract with customers	327.40	293.07	259.56	1,035.81
Other income	15.00	12.90	16.99	58.53
Total income (I)	**342.40**	**305.97**	**276.55**	**1,094.34**
Expenses				
Employee benefits expense	128.12	160.91	143.65	649.57
Server hosting expense	21.67	13.03	15.48	54.06
Depreciation and amortisation expense	11.39	8.46	8.88	24.02
Finance costs	1.29	1.43	1.53	3.89
Other expenses	94.34	61.99	54.89	188.01
Total expense (II)	**256.81**	**245.82**	**224.43**	**919.55**
Profit before tax (III = I-II)	**85.59**	**60.15**	**52.12**	**174.79**
Current tax	9.06	17.86	13.67	47.84
Adjustment of tax relating to earlier periods	11.38	-	-	(0.39)
Deferred tax	2.25	(2.45)	(0.32)	(3.83)
Income tax expense (IV)	**22.69**	**15.41**	**13.35**	**43.62**
Profit for the quarter/year (V= III-IV)	**62.90**	**44.74**	**38.77**	**131.17**

P&L – 9 Months

(Consolidated numbers In INR Million)

Particulars	For the nine months ended December 31, 2024 (Audited)	For the nine months ended December 31, 2023 (Unaudited)	For the year ended March 31, 2024 (Audited)
Income			
Revenue from contract with customers	895.16	770.47	1,035.81
Other income	43.41	46.59	58.53
Total income (I)	**938.57**	**817.06**	**1,094.34**
Expenses			
Employee benefits expense	454.50	488.84	649.57
Server hosting expense	46.58	40.03	54.06
Depreciation and amortisation expense	28.39	15.29	24.02
Finance costs	4.28	2.20	3.89
Other expenses	211.70	133.83	188.01
Total expense (II)	**745.45**	**680.19**	**919.55**
Profit before tax (III = I-II)	**193.12**	**136.87**	**174.79**
Current tax	41.76	37.51	47.84
Adjustment of tax relating to earlier periods	11.38	(0.39)	(0.39)
Deferred tax	(2.78)	(2.72)	(3.83)
Income tax expense (IV)	**50.36**	**34.40**	**43.62**
Profit for the quarter/year (V= III-IV)	**142.76**	**102.47**	**131.17**

For further information, please contact

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