Sensys Gatso Group AB
Q1 2026
Interim report presentation

Sensys Gatso Group

Ticker | SGG
Nasdaq Stockholm
May 7, 2026

SGG

SPEAKERS

Lewis Miller, CEO

Simon Mulder, CFO

BUSINESS

From Strategy to Success

Sensys Gatso Group

Lewis Miller, CEO

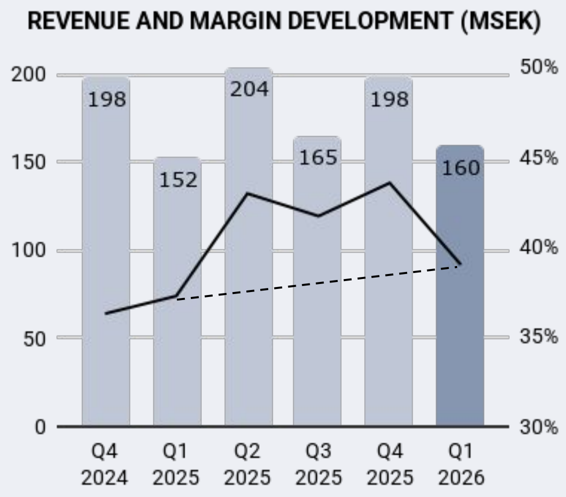
A Productive Start to 2026

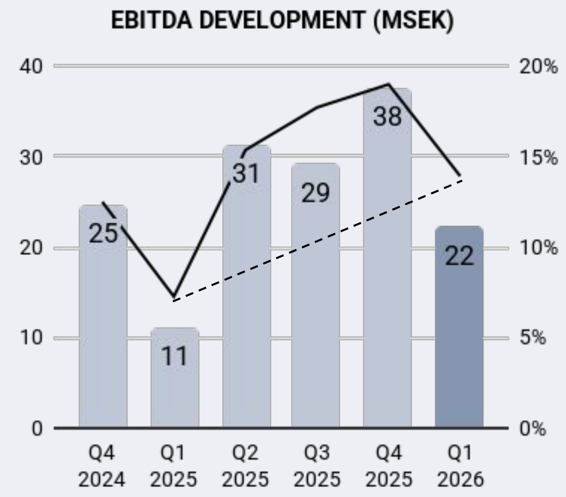
- ➔ Strong Q1 financial results
- ➔ New segment reporting and KPIs for greater clarity
- ➔ Strategic reorganisation to accelerate North American growth

BUSINESS | # Strong Q1 Financial Results

➔ **Year over year improvements in revenue, EBITDA and EBIT**

- Revenue up 5% to MSEK 160
- EBITDA up 100% to MSEK 22,2 (11,1) with margin improving from 7,3% to 13,9%
- Positive EBIT of MSEK 8,2, up from MSEK -1,1 last year





BUSINESS

New Segment Reporting & KPIs

- New segment reporting
  - North America
  - International
- New North American KPIs
  - Revenue Retention Rate
  - New Business Intake
  - Backlog
- Better reflects strategic priorities, different business models, and performance drivers
- North American reorganisation

Flux - Gantry System

FINANCIAL | # Group Results Q1

Sensys Gatso Group

CONDENSED INCOME STATEMENT

TSEK	Q1 2026	Q1 2025	Growth
Revenue	159 548	152 408	4.7%
Gross profit	62 202	56 771	
Operating profit (EBITDA)	22 209	11 073	100.6%
Operating income (EBIT)	8 214	-1 128	
Profit for the period	6 661	-14 737	
Gross margin	39.0%	37.2%	
EBITDA Margin	13.9%	7.3%	

CONSTANT CURRENCY

TSEK	Q1 2026	Q1 2025	Real growth
Revenue	157 564	139 344	13.1%
Operating profit (EBITDA)	21 982	9 577	129.5%

YoY Revenue, EBITDA and Profit improvements

➔ **Revenue MSEK 159,5 (152,4)**
- Strong performance International segment
- Revenue growth was 4.7% (total) and
- 13.1% (real growth, FX adjusted)

➔ **Gross profit MSEK 62,2 (56,8)**
- Improved gross margin 39% (37,2%)
- Driven by increased revenue in the quarter and disciplined project management

➔ **EBITDA MSEK 22,2 (11,1)**
- Strong Q1 performance with EBITDA margin 13,9% (7,3%)
- Effective global expense management

➔ **Profit for the period MSEK 6,7 (-14,7)**
- Improved Profit due to economies of scale in International segment

FINANCIAL | # Segment North America

Revenue impacted by currency and event volumes

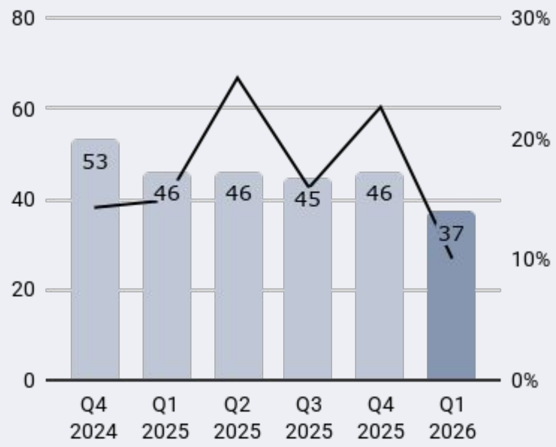
➔ **New Business Intake (ARR) MSEK 0,7 (10,5)**
- New customer in Colorado
- Expanded footprint in New York State after the quarter (MSEK 5,8 ARR)

➔ **Backlog (ARR) MSEK 23,2**
- MSEK 4,3 backlog conversion in quarter from new installations
- Solid backlog to support future growth

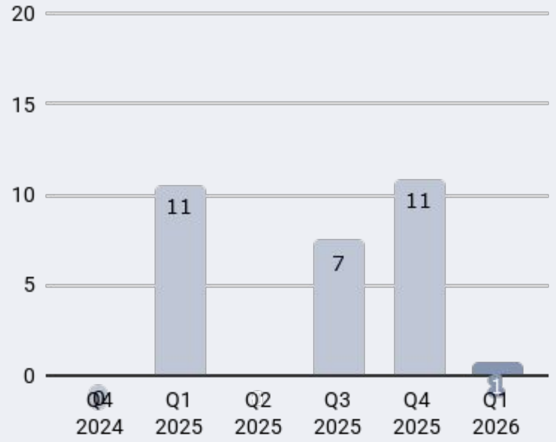
➔ **Revenue MSEK 37 (46)**
- Currency impact MSEK -7
- Revenue Retention Rate of 84,6% due to lower event volumes
  - Extreme Winter weather in US Northeast
  - Increased compliance with traffic regulations in Albany, NY

➔ **EBITDA MSEK 4 (7)**
- EBITDA margin 10% (14%), impacted by the lower revenue

REVENUE AND EBITDA DEVELOPMENT (MSEK)



NEW BUSINESS INTAKE (MSEK)



FINANCIAL | # Segment International

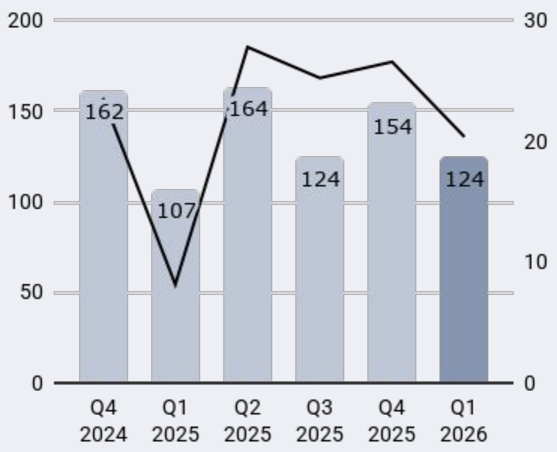
Good Q1 performance on Product and Services revenue

➔ **Order intake MSEK 35,3 (73,4)**
- Repeat Product sales and expansion of Dutch maintenance Services

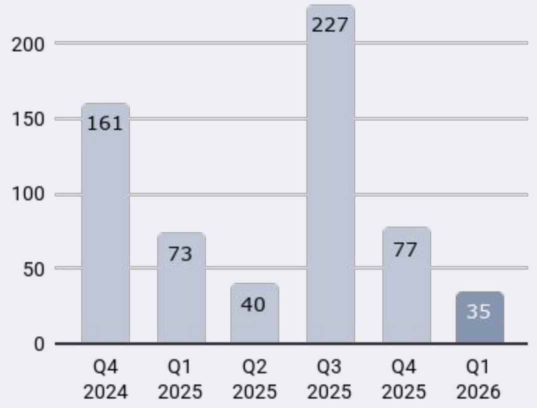
➔ **Revenue MSEK 124,2 (107,0)**
- Ongoing projects with Product sales in Sweden, the Netherlands, and Australia
- Strong Service revenue from Sweden, the Netherlands and our service contract with Saudi Arabia.

➔ **EBITDA MSEK 20 (8)**
- EBITDA margin 16% (14%), driven by economies of scale and effective project and expense management

REVENUE AND EBITDA DEVELOPMENT (MSEK)



ORDER INTAKE DEVELOPMENT (MSEK)



FINANCIAL | # Cash flow

TSEK	Q1 2026	Q1 2025
Operating profit (EBIT)	**8 214**	**-1 128**
Items with no effect on cash flow	19 339	7 041
Interest and tax	-5 752	-8 088
Changes in working capital	-27 511	-28 825
Cash flow from operating activities	**-5 710**	**-31 000**
Cash flow from investing activities	-17 085	-12 896
Cash flow from financing activities	4 146	11 134
Cash flow from investing and financing	**-12 939**	**-1 762**

Movements in cash	**-18 649**	**-32 762**
Opening cash and cash equivalents	159 719	165 322
Translation differences in liquid funds	313	-7 117
Remainder Credit Facility	54 715	23 647
Available cash	**196 098**	**149 090**

Strong cash position to finance growth

➔ **Cash flow from operating activities MSEK -6 (-31)**
- Non cash flow items impacted by favourable translation impact
- Build-up of working capital due to continued delivery Swedish and Dutch projects

➔ **Investing and financing**
- Investments in hardware and software platforms MSEK 10 and Fixed Assets in Operations MSEK 7
- Assets financing increased by MSEK 7 for Australian projects

➔ **Available cash**
- Increased available cash MSEK 196 (149)
- Credit facility mainly unused

FINANCIAL | # Financing position

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TSEK	31 Mar 2026	31 Dec 2025
Lease liabilities	39 501	41 810
Bond	323 776	319 631
Bank Loans and Credit facilities	14 520	7 102
Cash and bank	-141 384	-159 719
Net Interest-bearing debt	**236 413**	**208 824**
EBITDA 12 months rolling	*120 317*	*109 180*
Leverage ratio	*1.96*	*1.91*

Solid leverage ratio

➔ **Net interest bearing debt MSEK 236 (209)**

- Translation on EUR Bond MSEK 4
- Investments in Australian project Assets MSEK 7
- Cash and bank MSEK 141
- Leverage ratio at 1,96 (1,91) remains solid

SGG | # Financial Outlook 2026

Reaffirming outlook

- ➔ Revenue MSEK 750-800
- ➔ EBITDA 14%-16%
- ➔ Continuing to closely monitor market developments, including volatility introduced by the conflict in the Middle East

Flux - Trafikverket Speed System

Key Takeaways

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A Productive Start to 2026

- Year over year improvements in Revenue, EBITDA and EBIT
- New segment reporting and KPIs provide clearer view of performance
- Restructure in North America to accelerate profitable growth
- Reaffirm 2026 financial guidance

Flux Mobile - Tripod Solution

Q&A

Sensys Gatso Group

Lewis Miller, CEO

Simon Mulder, CFO

Website

https://www.sensysgatso.com

Investor Relations

https://www.sensysgatso.com/investors

Contact

investors@sensysgatso.com