Sensys Gatso Group AB
Q2 2026
Interim report presentation

Sensys Gatso Group

"Disciplined Execution Driving Performance"

Ticker | SGG
Nasdaq Stockholm
August 20, 2026

SGG | Strong Q2 results

Lewis Miller, CEO

Simon Mulder, CFO

BUSINESS

Disciplined Execution Driving Performance

Lewis Miller, CEO

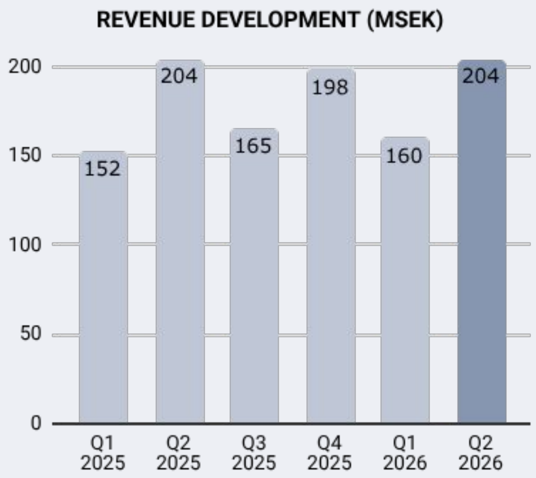
Continuing Momentum

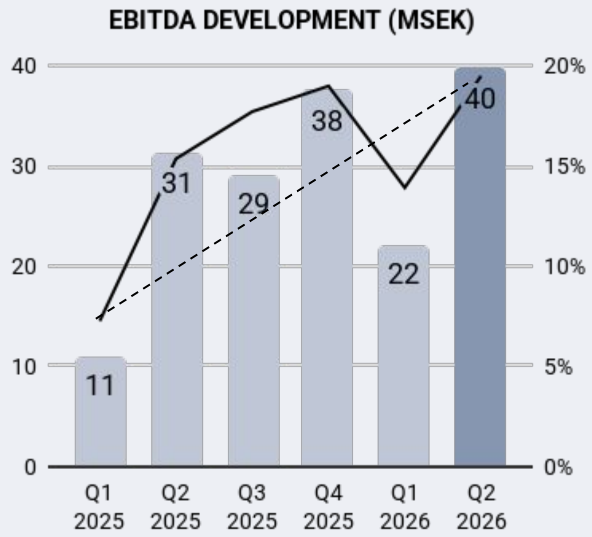
- ➔ Material increase in profitability
- ➔ Increased full year EBITDA guidance to 15-17%
- ➔ Strong New Business Intake
- ➔ A new CTO

BUSINESS | Strong Q2 & H1 Financial Results

➔ Significant margin expansion

- Q2 revenue of MSEK 204 (204), up 2% YTD to MSEK 364 (356)
- Q2 EBITDA of 39,8 (31,4) with margin expansion to 19,5% (15,4%)
- YTD EBITDA margin expanding from 11,9 to 17,0 percent
- Q2 EBIT of MSEK 25,1 (18,0)





Growing North America

- North American reorganisation yielding results
- Strong New Business Intake
  - ARR MSEK 16,5 in Q2
  - New customers in Colorado, New York and Pennsylvania
  - Strategic win in Minnesota after the period
- Backlog increase to ARR MSEK 35,3
- Go-live of new Xilium Traffic Event Service

Minnesota - FLUX Work Zone Trailer

FINANCIAL | # Group Results Q2

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CONDENSED INCOME STATEMENT

TSEK	Q2 2026	Q2 2025	Growth
Revenue	204 018	204 107	0.0%
Gross profit	76 813	87 655	
Operating profit (EBITDA)	39 769	31 355	26.8%
Operating income (EBIT)	25 127	17 979	
Profit for the period	14 505	-8 935	
Gross margin	37.7%	42.9%	
EBITDA Margin	19.5%	15.4%	

YoY EBITDA and Profit improvements

➔ **Revenue MSEK 204,0 (204,1)**
- Strong International Services revenue driven by global maintenance contracts
- Improved quarter over quarter North American performance
- Navigating compliance effect in North America and International Product revenue timing

➔ **Gross profit MSEK 76,8 (87,7)**
- Gross margin 37,7% (42,9%)
- Compliance effect in North America

➔ **EBITDA MSEK 39,2 (31,4)**
- Strong EBITDA margin 19,5% (15,4%)
- Global maintenance contract performance
- Effective expense management

➔ **Profit for the period MSEK 14,5 (-8,9)**
- Driven by strong EBITDA
- Lower currency impact in financial Items

FINANCIAL | # Segment North America

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Improved sales performance with quarter over quarter revenue improvement

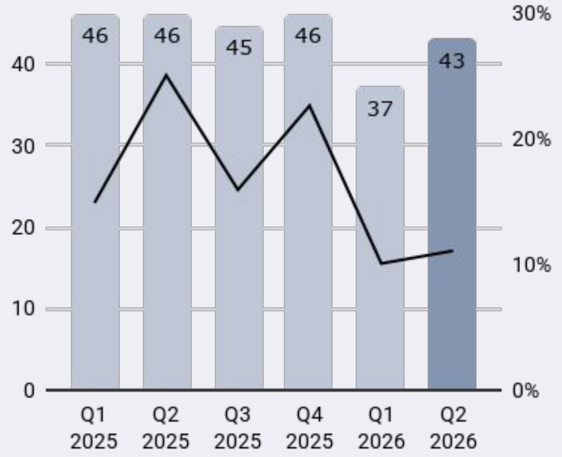
➔ **New Business Intake (ARR) MSEK 16,5**
- New customers in Colorado, New York and Pennsylvania
- Strategic contract signing in Minnesota after the quarter

➔ **Backlog (ARR) increase from MSEK 23,2 to MSEK 35,3**
- Driven by New Business Intake MSEK 16,5 net of backlog movements
- Increased backlog supports future growth

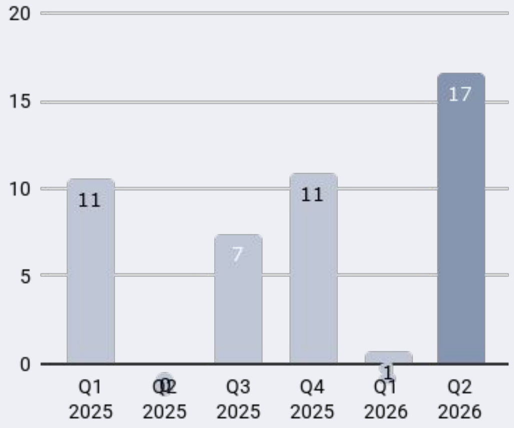
➔ **Revenue MSEK 43 (46)**
- Lower year over year violation volumes
- Up 15,5% from Q1

➔ **EBITDA MSEK 5 (12)**
- EBITDA margin 11% (25%), impacted by the lower revenue
- Q2 2025 positively impacted by one-off insurance recovery of MSEK 8
- Underlying operating profit improved by MSEK 1 after adjusting for one-time items

REVENUE AND EBITDA DEVELOPMENT (MSEK)



NEW BUSINESS INTAKE (MSEK)



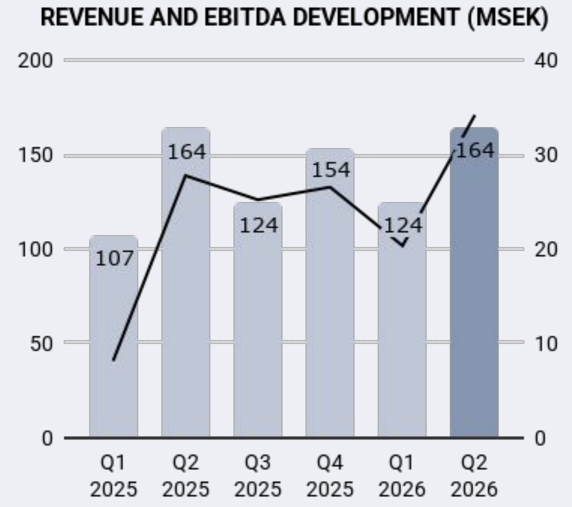
FINANCIAL | # Segment International

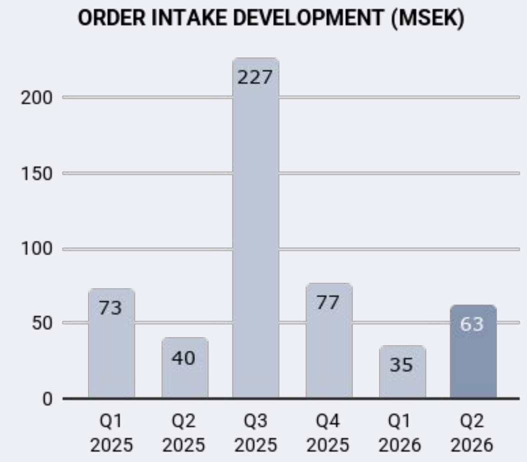
Increased order intake and profitability

➔ **Order intake MSEK 62,6 (39,7)**
- Repeat Product sales and Saudi maintenance contract renewal
- Expansion of business in Queensland, Australia worth MSEK 38, after the quarter

➔ **Revenue MSEK 164,2 (163,6)**
- Continued delivery of core Dutch and Swedish projects
- Strong Service revenue more than offset delayed Product revenue

➔ **EBITDA MSEK 34,2 (27,8)**
- EBITDA margin 21% (17%)
- Effective project and expense management





FINANCIAL | # Cash flow

TSEK	Q2 2026	Q2 2025	YTD Q2 2026	YTD Q2 2025
Operating profit (EBIT)	**25 127**	**17 979**	**33 341**	**16 851**
Items with no effect on cash flow	19 747	11 692	35 472	18 733
Interest and tax	-7 274	-7 211	-13 026	-15 299
Changes in working capital	-12 913	-12 455	-36 810	-41 280
Cash flow from operating activities	**24 687**	**10 005**	**18 977**	**-20 995**
Cash flow from investing activities	-25 181	-26 696	-42 266	-39 592
Cash flow from financing activities	-4 203	11 733	- 57	22 867
Cash flow from investing and financing	**-29 384**	**-14 963**	**-42 323**	**-16 725**

Movements in cash	**-4 697**	**-4 958**	**-23 346**	**-37 720**
Opening cash and cash equivalents	141 383	125 443	159 719	165 322
Translation differences in liquid funds	50	610	363	-6 507
Remainder Credit Facility	55 450	16 101	55 450	16 101
Available cash	**192 186**	**137 196**	**192 186**	**137 196**

Strong cash position to finance growth

➔ Cash flow from operating activities MSEK 25 (10)

- Build-up of working capital due to recognition of project milestones in the Dutch projects based on percentage of completion. MSEK 13 in the Quarter and MSEK 37 at mid-year.

➔ Investing and financing

- Investments in hardware and software platforms MSEK 9 and Fixed Assets in Operations MSEK 13
- Investments first half year amounted to MSEK 42

➔ Available cash

- Increased available cash MSEK 192 (137)

FINANCIAL

Financing position

TSEK	30 Jun 2026	31 Dec 2025
Lease liabilities	37 526	41 810
Bond	328 687	319 631
Bank Loans and Credit facilities	14 352	7 102
Cash and bank	-136 735	-159 719
Net Interest-bearing debt	**243 830**	**208 824**
EBITDA 12 months rolling	*128 731*	*109 180*
Leverage ratio	*1.89*	*1.91*

Solid leverage ratio

➔ **Net interest bearing debt MSEK 243 (209)**

- Translation on EUR Bond MSEK 9
- Investments in Australian project Assets MSEK 7
- Cash and bank MSEK 137
- Leverage ratio at 1,89 (1,91) remains solid

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Financial Outlook 2026

Increased full year EBITDA guidance

➔ Reaffirming revenue guidance of MSEK 750-800

➔ EBITDA guidance increased from 14-16% to 15-17%

➔ Continuing to closely monitor project schedules and global political developments

School zone speed enforcement

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SGG | # Key Takeaways

Disciplined Execution Driving Performance

- ➔ Material increase in profitability
- ➔ North American restructure yielding results
- ➔ Increased full year EBITDA guidance

FLUX Mobile - Tripod Solution

Q&A

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