

Sensys Gatso Group AB

Q4 2025

Interim report presentation

Sensys
Gatso
Group

Ticker | **SGG**
Nasdaq Stockholm
February 26, 2026

SGG | **SPEAKERS**



Lewis Miller, CEO



Simon Mulder, CFO



AGENDA | BUSINESS UPDATE

Sensys
Gatso
Group

- » CEO Update
- » Q4 and Full Year in Summary
- » Financial Outlook 2026



Keeping our Promises



Lewis Miller, CEO

Consistent & Reliable Results

- Third Consecutive Quarter of Solid Performance
- Significant Revenue Growth and Margin Expansion
- Momentum for 2026

Continued Strong Performance

- Q4 revenue of MSEK 198
- Full year revenue of MSEK 719, 14% increase over 2024
- Constant currency revenue of MSEK 214 for Q4 (8%) and MSEK 757 for full year (20%)
- Significant revenue from Swedish and Dutch projects
- Recurring revenue growth driven by global maintenance contracts

Trafikverket [850MSEK]

Golden sample and proto type finalized in 2024. Delivery first systems in H1 2025



Dutch Speed Project [400MSEK]

Continues rollout during 2025



Saudi Arabia [27MSEK annually]

Location opened in 2025 and maintenance started in Q2



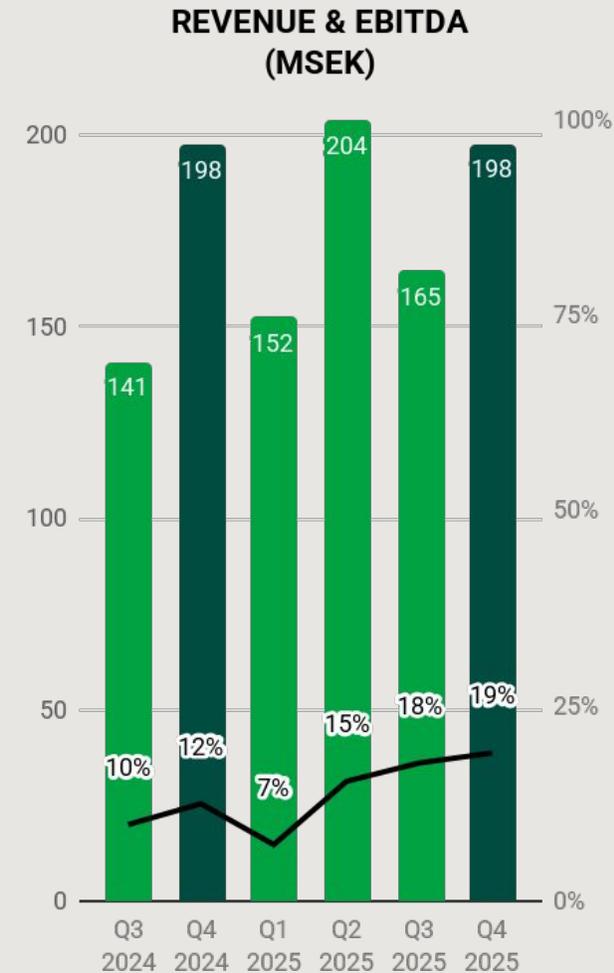
Revenue diversification

Recovery from previously communicated -40MSEK Iowa impact



Improved Profitability

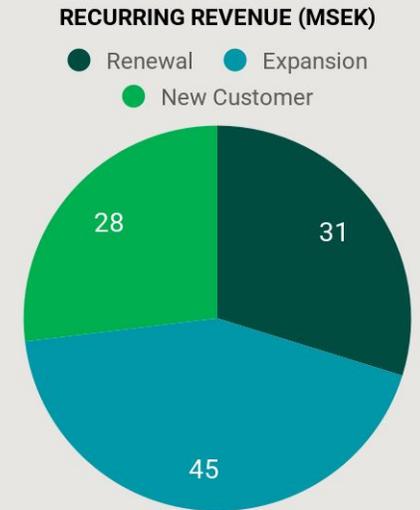
- Q4 EBITDA of MSEK 37.4, 18.8%
- 52% increase over Q4 2024 (MSEK 24.7, 12.5%)
- Full year EBITDA of MSEK 109.2 (15.2%) compared to MSEK 65.9 (10.4%) in 2024
- Economies of scale in Sweden, global maintenance contracts and improved operational efficiency in US



Solid Order Intake



- Q4 order intake of MSEK 151, exceeding Q4 2024 in constant currency (MSEK 164 vs 161)
- MSEK 104 recurring revenue with two thirds incremental (expansion and new customer)
- Expansion with South Australia Police and new US customers in Pennsylvania
- Full year order intake of MSEK 729



AGENDA

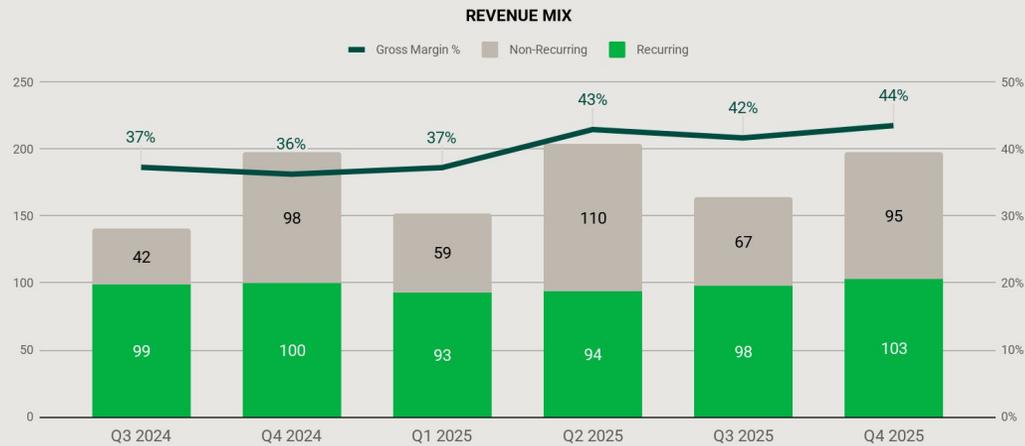
FINANCIAL UPDATE

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- » Q4 Results
- » Segments
- » Underlying growth & Currency impact
- » Cash Position



FINANCIAL | Q4 Results



Strong quarterly performance

→ Revenue

- ◆ Q4 revenue of MSEK 198 (198) or MSEK 214 in constant currency
- ◆ 8% underlying growth (fx adjusted)

→ Gross profit

- ◆ Q4 gross margin of 44% (36%)
- ◆ Continued delivery on the Dutch and Swedish projects

→ EBITDA

- ◆ Strong Q4 performance with MSEK 38 EBITDA, up from MSEK 25 in Q4 2024
- ◆ EBITDA margin 19% (12.5%)

→ Cash Flow

- ◆ Positive cash flow from operating activities, MSEK 107 for Q4 and MSEK 125 for the year
- ◆ Good conversion on working capital assets

Segment Managed Services

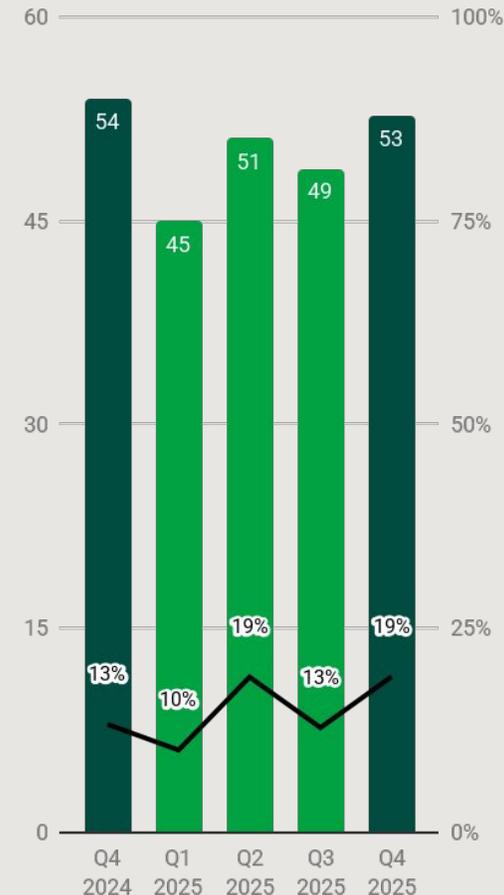
Consistent execution driving improved margins

- **Order intake MSEK 74 (0)**
 - ◆ MSEK 67 incremental (expansions and new customers)
 - ◆ MSEK 7 in renewals

- **Revenue constant currency MSEK 53 (54)**
 - ◆ Negative currency impact in the quarter MSEK 7
 - ◆ Quarter on Quarter revenue increased by 4%

- **EBITDA up to MSEK 9 (7)**
 - ◆ EBITDA margin 19% (13%)
 - ◆ Improved operational efficiency

REVENUE & EBITDA CONSTANT CURRENCY (MSEK)



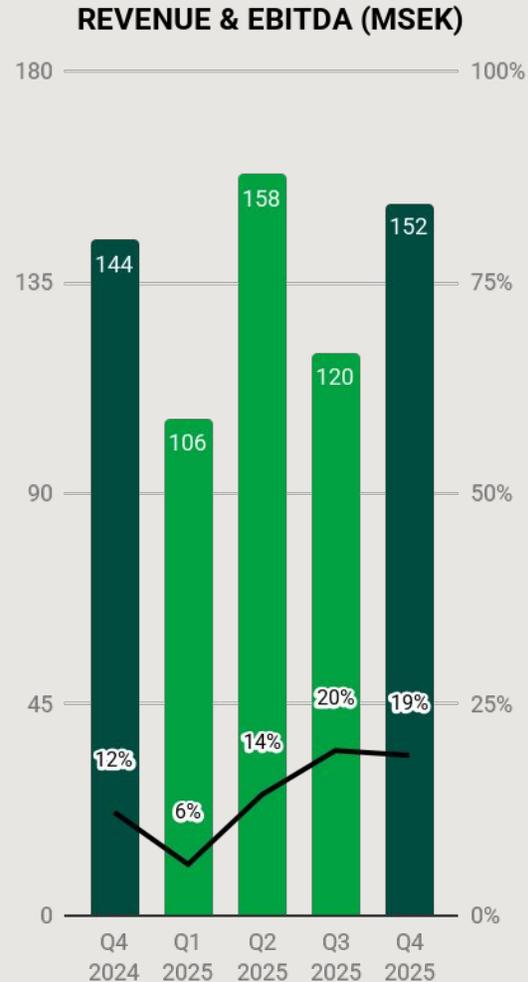
Segment System Sales

Topline growth combined with margin expansion

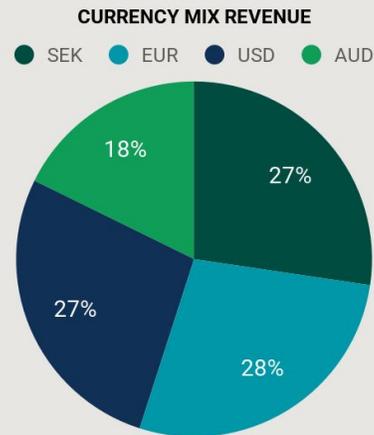
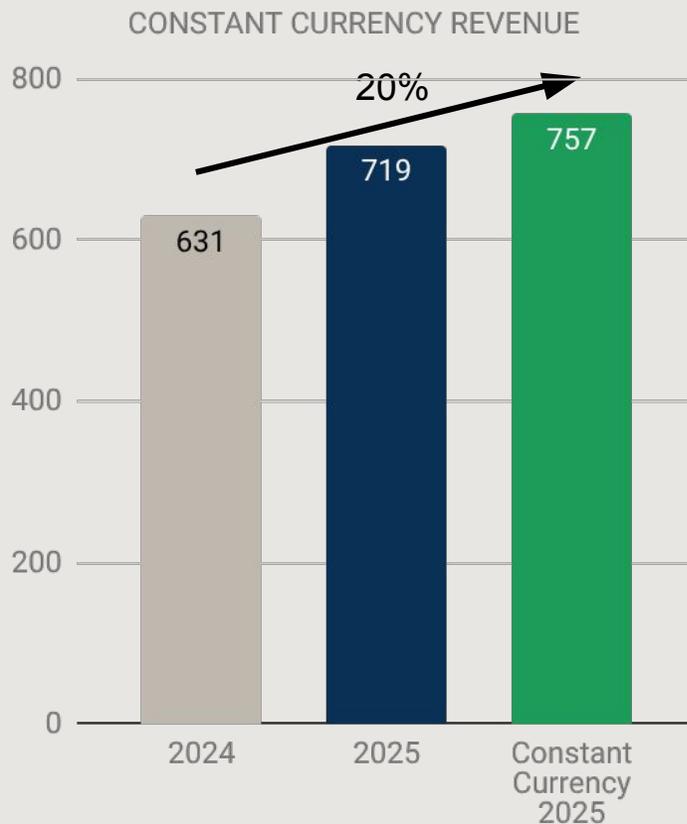
- **Order intake MSEK 77 (161)**
 - ◆ Driven by Australia order intake of MSEK 29
 - ◆ Smaller repeat orders in the EU

- **Revenue MSEK 152 (144), up 6%**
 - ◆ Deliveries on Swedish project
 - ◆ Rollout of Dutch projects including additional mobile unit sales and average speed
 - ◆ Additional systems contributing to Saudi maintenance performance

- **EBITDA MSEK 23 (12), up 92%**
 - ◆ Economies of scale in Sweden
 - ◆ Important contribution from Saudi maintenance activities



SGG | 20% Underlying Revenue Growth



→ 20% revenue growth adjusted for Fx

- ◆ AUD and USD down 11-15% in 2025 against strengthening Swedish Krona
- ◆ Due to currency mix, including significant Swedish revenue, overall 5% impact

→ Constant currency reporting 2026

- ◆ Continue to report on constant currency
- ◆ EUR: 10.75 / USD:9.00 / AUD:6.00

→ Mitigating currency headwinds

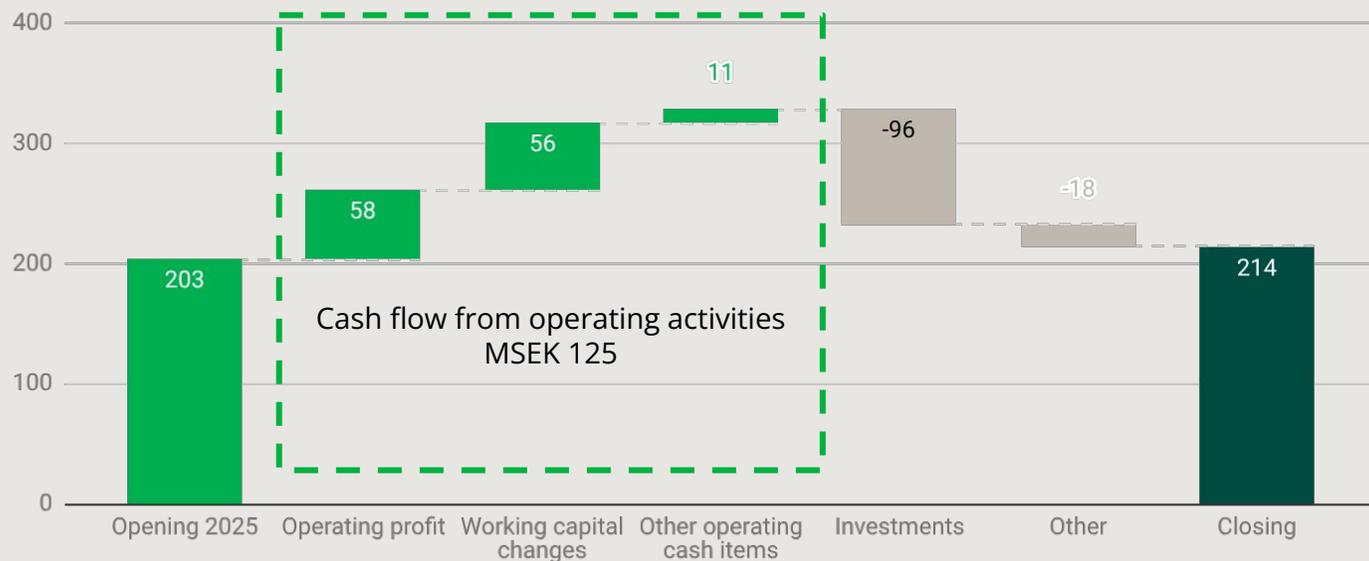
- ◆ Maintain foreign currency levels sufficient for ongoing operations
- ◆ Weight towards Swedish Krona, with more than 50% held in Swedish Krona at year end

FINANCIAL | Cash Position

Improved available cash MSEK 214

- Cash flow from operating activities totalled MSEK 125 driven by working capital improvement of MSEK 56
- Bond proceeds funding investments (MSEK 96)

AVAILABLE CASH MOVEMENTS 2025



Interest bearing debt MSEK 209

- Significant translation effect on the Euro Bond
- Reduced usage of credit facilities
- Cash on bank closed at MSEK 160

MSEK	31 Dec 2025	31 Dec 2024
Lease liabilities	42	24
Bond	320	338
Bank Loans and Credit facilities	7	20
Shareholder loans	0	0
Cash and bank	-160	-165
Net Interest-bearing debt	209	217

SGG | Financial Outlook 2026

Continuing profitable growth

- Anticipate currency headwinds as the Swedish Krona continues to strengthen
- Revenue MSEK 750-800
- EBITDA 14%-16%
- Continuing to closely monitor market developments



SGG | Key Takeaways

Year of Progress in 2025

- Strong revenue growth
- Significant margin expansion
- Improved cash position
- Solid order intake
- Momentum for 2026



Flux Mobile - Tripod Solution



Lewis Miller, CEO



Simon Mulder, CFO

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