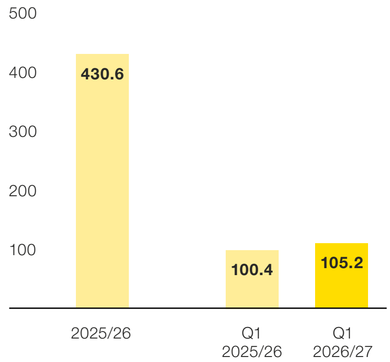
Headlines Q1 2026/27.

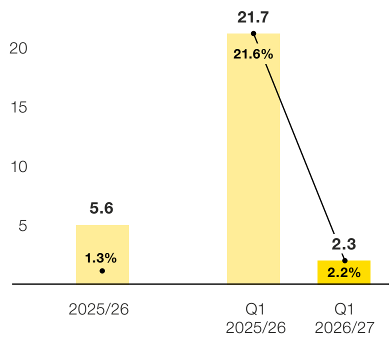
April 1, 2026, to June 30, 2026.

- Revenues of EUR 105 million are 5% higher than the prior-year figure of EUR 100 million.
- EBIT was positive at EUR 2 million, with no significant one-time effects included.
- Sale of the majority stake in tolltickets GmbH in early July.
- Key terms for financial restructuring agreed upon in July.
- Outlook for full year 2026/27: Revenues and EBIT expected to exceed prior year's figures.

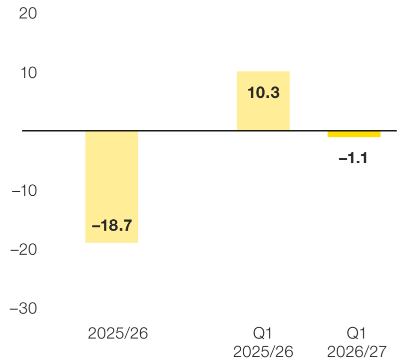
Revenues
in EUR million



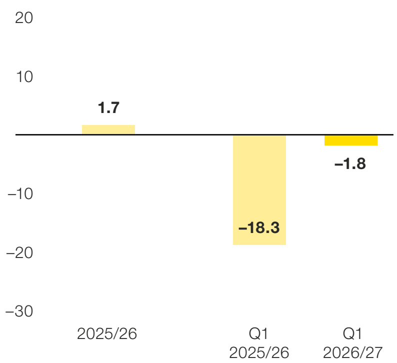
EBIT (in EUR million)
and **EBIT margin**



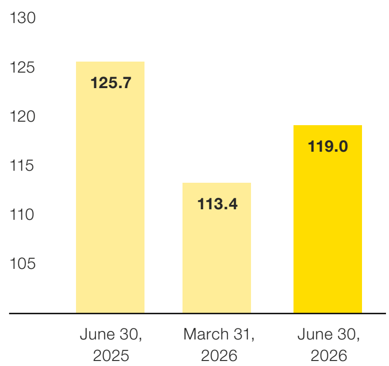
Result for the period attributable to equity holders in EUR million



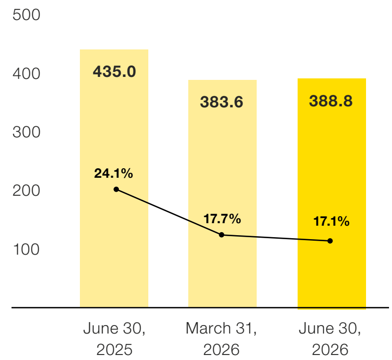
Free cash flow[1]
in EUR million



Net debt[2]
in EUR million



Total assets (in EUR million)
and **equity ratio**



1) Cash flow from operating activities + cash flow from investing activities
2) Cash and cash equivalents + other current financial assets – financial liabilities – lease liabilities

Business performance Q1 2026/27.

Slightly improved business performance in the first quarter of financial year 2026/27.

Kapsch TrafficCom reported a slight improvement in business performance in the first quarter of financial year 2026/27, as expected. Revenues exceeded the prior-year figure, and the positive EBIT reflects the adjustment of the cost base that began in the prior year. In addition, Kapsch TrafficCom concluded two significant agreements in July, after the end of the first quarter.

Significant events since the end of the first quarter.

On July 8, Kapsch TrafficCom signed an agreement to sell the majority stake in its German subsidiary, tolltickets GmbH. As previously announced, a positive EBIT effect is expected upon closing.

Key points for financial restructuring agreed upon.

Furthermore, in July, Kapsch TrafficCom agreed with its major financial partners on the key terms of a restructuring. These include a standstill agreement, under which the receivables due and becoming due under financing agreements were deferred, as well as a binding term sheet serving as the basis for a restructuring agreement with a term ending on March 31, 2028. Management will continue to implement comprehensive cost-saving and efficiency-enhancing measures. In addition, the Company plans to divest assets from its business portfolio and is also exploring ways to strengthen its capital base. A final restructuring agreement is expected to be concluded in September 2026.

At the end of July, the Supervisory Board also appointed Mr. Markus Richter as Chief Financial Officer; in this role, he will play a key role in overseeing the implementation of the restructuring process.

Earnings performance.

Revenues reached EUR 105 million in the reporting quarter, up from EUR 100 million in the first quarter of 2025/26, continuing the positive trend from March. EBIT amounted to EUR 2 million in the reporting quarter. The cost-cutting measures implemented in the previous financial year 2025/26 are thus reflected, as expected, in the positive operating result.

In the first quarter of the prior year, the settlement with the Federal Republic of Germany in connection with the termination of a contract had resulted in a positive impact on earnings of EUR 23 million. Excluding this one-time effect, EBIT would have been negative at EUR -2 million in the comparable quarter of the prior year.

The financial result improved from EUR -9 million to EUR -3 million, driven in particular by more favorable exchange rate effects. The result for the period attributable to equity holders amounted to EUR -1 million in the first quarter of 2026/27, compared with EUR 10 million in the same quarter of the prior year. Earnings per share were EUR -0.08 (prior year: EUR 0.72).

Segment performance.

The tolling segment accounted for 70% of total revenues, while the traffic management segment accounted for 30%. In the tolling segment, revenues in the first quarter of 2026/27 remained at the prior-year level at EUR 73 million; EBIT reached EUR 2 million (prior year: EUR 20 million, including the one-time effect from Germany). In the traffic management segment, revenues rose by 18% from EUR 27 million to EUR 32 million, while EBIT declined from EUR 1.5 million to EUR 0.7 million.

From a regional perspective, Kapsch TrafficCom recorded growth in all regions: 3% in the EMEA region (Europe, Middle East, Africa), 6% in the Americas region (North, Central, and South America), and 13% in the APAC region (Asia-Pacific).

Financial and asset position.

Cash flow from operating activities amounted to EUR -7 million, compared with EUR -21 million in the first quarter of the prior year, with the change in net working capital, in particular, being significantly lower than in the prior year. Free cash flow was negative at EUR -2 million (prior year: EUR -18 million).

The balance sheet remained stable in the first quarter of financial year 2026/27. The liquidity situation remained tight, and as of June 30, 2026 – as was the case at the end of financial year 2025/26 – all financial liabilities totaling EUR 110 million were classified as current. The reason for this was the failure to comply with agreed covenants as of the balance sheet date of March 31, 2026.

Total assets increased from EUR 384 million as of the balance sheet date of March 31, 2026, to EUR 389 million as of June 30, 2026. Equity remained virtually unchanged at EUR 67 million, as did the equity ratio at 17%. Net debt rose to EUR 119 million (March 31, 2026: EUR 113 million) due to lower cash and cash equivalents, and the gearing ratio increased to 179% (March 31, 2026: 167%).

Outlook.

For the 2026/27 financial year, Kapsch TrafficCom expects the market environment to remain challenging. Management is refraining from providing a quantitative outlook for the time being but expects revenues and EBIT to exceed the prior-year figures.

Revenues and EBIT growth expected for the full year 2026/27.

Although the restructuring agreement will initially result in higher financing and consulting costs, the measures to be defined open up the potential for higher profitability at Kapsch TrafficCom.

Selected key data.

2025/26 refers to the financial year (April 1 to March 31)
Q1: first quarter of a financial year (April 1 to June 30)
Unless otherwise stated, all values in EUR million.

Earnings data	**2025/26**	**Q1 2025/26**	**Q1 2026/27**	**+/-**
Revenues	430.6	100.4	105.2	4.7%
Share of tolling segment	295.1	73.6	73.4	-0.2%
Share of traffic management segment	135.5	26.9	31.8	18.3%
Share of tolling segment	68.5%	73.3%	69.8%	-3.5 PP
Share of traffic management segment	31.5%	26.7%	30.2%	3.5 PP
EBITDA[1]	20.6	24.8	5.2	-78.8%
EBIT	5.6	21.7	2.3	-89.3%
Share of tolling segment	8.4	20.2	1.7	-91.7%
Share of traffic management segment	-2.9	1.5	0.7	-55.6%
EBIT margin	1.3%	21.6%	2.2%	-19.4 PP
EBIT margin tolling segment	2.9%	27.4%	2.3%	-25.2 PP
EBIT margin traffic management segment	-2.1%	5.5%	2.1%	-3.4 PP
Financial result	-11.4	-9.1	-2.7	-70.1%
Income tax	-11.2	-2.0	-0.5	-74.6%
Result for the period attributable to equity holders	-18.7	10.3	-1.1	—
Earnings per share in EUR	-1.31	0.72	-0.08	—

Cash flow	**2025/26**	**Q1 2025/26**	**Q1 2026/27**	**+/-**
Cash flow from operating activities	-10.2	-20.6	-7.3	-64.5%
of which cash flow from earnings	-7.8	12.3	-4.5	—
of which change in net working capital	-2.4	-32.8	-2.8	-91.6%
Cash flow from investing activities	11.9	2.3	5.5	>100%
Free cash flow[2]	1.7	-18.3	-1.8	-90.1%
Cash flow from financing activities	-25.4	-4.7	-4.8	3.1%

Balance sheet data	**March 31, 2026**		**June 30, 2026**	**+/-**
Total assets	383.6		388.8	1.3%
Non-current assets	149.3		148.6	-0.5%
Current assets	230.5		236.1	2.4%
Non-current liabilities	52.6		48.9	-7.1%
Current liabilities	259.2		269.7	4.1%
Total equity[3]	67.8		66.5	-1.9%
Equity ratio[3]	17.7%		17.1%	-0.6 PP
Net debt[4]	113.4		119.0	4.9%
Gearing[5]	167.2%		178.9%	11.7 PP

Other information	**2025/26**	**Q1 2025/26**	**Q1 2026/27**	**+/-**
Employees, end of period	2,717	3,033	2,662	-12.2%

[1] Operating result before amortization, depreciation and impairment
[2] Cash flow from operating activities + cash flow from investing activities
[3] Including non-controlling interests
[4] Cash and cash equivalents + other current financial assets - financial liabilities - lease liabilities
[5] Net debt / equity

Financial calendar.

August 30, 2026	Record date: Annual General Meeting
September 9, 2026	Annual General Meeting
November 25, 2026	Results H1 2026/27
February 24, 2027	Results Q1–Q3 2026/27

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Disclaimer.
Certain statements in this report are forward-looking statements. They contain the words “believe,” “intend,” “expect,” “plan,” “assume,” and terms of a similar meaning. Forward-looking statements reflect the beliefs and expectations of the Company. Actual events may deviate significantly from the expected developments, due to a range of factors. As a result, readers are cautioned not to place undue reliance on such forward-looking statements. Kapsch TrafficCom AG is under no obligation to update forward-looking statements made herein, unless required by applicable law.

This report was created with care and all data has been checked conscientiously. Nevertheless, the possibility of layout and printing errors cannot be excluded. Differences in calculations may arise due to the rounding of individual items and percentages. The English translation is for convenience; only the German version is authentic.

When referring to people, the authors strive to use both the male and female forms as far as possible (for example: he or she). For readability reasons, occasionally only the masculine form is used. However, it always refers to people of all gender categories.

This report does not constitute a recommendation or invitation to purchase or sell securities of Kapsch TrafficCom.

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Kapsch TrafficCom

Kapsch TrafficCom is a globally renowned provider of transportation solutions for sustainable mobility with successful projects in more than 50 countries. Innovative solutions in the areas of tolling and traffic management contribute to a healthy world without congestion.

With one-stop-shop solutions, the Company covers the entire value chain of customers, from components to design and implementation to the operation of systems.

Kapsch TrafficCom, headquartered in Vienna, has subsidiaries and branches in more than 25 countries and is listed in the Prime Market segment of the Vienna Stock Exchange (ticker symbol: KTCG). In its 2025/26 financial year, over 2,700 employees generated revenues of EUR 431 million.

>>> ***www.kapsch.net***

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