Kapsch TrafficCom

Result for the financial year 2025/26.

July 29, 2026.

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Headlines.

Financial year (FY) 2025/26 (April 1, 2025 to March 31, 2026).

Decline in revenues by 19% to € 431mn.

EBIT reached € 6mn due to income from Germany.

Adjustments to cost base to take effect in 2026/27, further adjustments still underway.

Key terms of a restructuring with comprehensive measures agreed upon.

Outlook for financial year 2026/27: Revenues and EBIT above previous year's figures.

Selected key data.

FY 2025/26.

April 1, 2025 to March 31, 2026

Revenues

€ 430.6mn (-18.8% ↘)

FY 2024/25: € 530.3mn

EBIT

€ 5.6mn (-23.6% ↘)

FY 2024/25: € 7.3mn*

EBIT margin

1.3% (-0.1 PP ↘)

FY 2024/25: 1.4%*

Free cash flow

€ 1.7mn (-92.0% ↘)

FY 2024/25: € 21.2mn

Result for the period (attributable to equity holders)

€ -18.7mn (-54.5% ↘)

FY 2024/25: € -12.1mn*

Net debt

(March 31, 2026)

€ 113.4mn (+11.7% ↗)

March 31, 2025: € 101.5mn

Total assets

(March 31, 2026)

€ 383.6mn (-14.6% ↘)

March 31, 2025 : € 449.2mn*

Equity ratio

(March 31, 2026)

17.7% (-1.4 PP ↘)

March 31, 2025 : 19.1%*

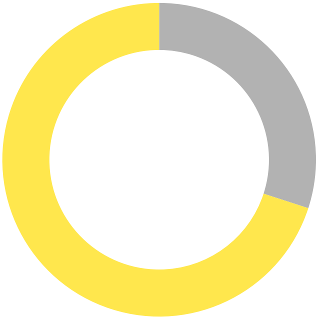
* Retrospective adjustment in accordance with IAS 8

Decline in revenues of 18.8% compared to the previous year.

Removal of two major operation projects in Belarus and South Africa affects tolling segment and EMEA region with approx. € 80mn; generally challenging market situation and project delays.

Segments.

Decline in revenues, especially in the tolling segment.

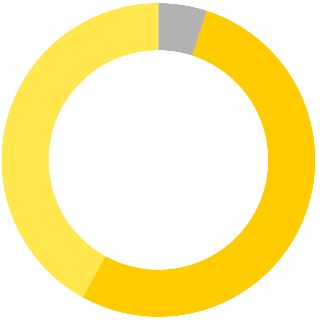


69% **Tolling**
€ 295mn (↘ -24.9%)

31% **Traffic management**
€ 135mn (↘ -1.3%)

Regions.

Year-on-year declines particularly in EMEA.



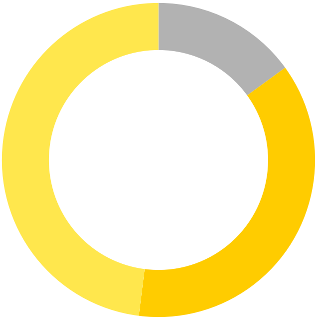
42% **EMEA**
€ 180mn (↘ -30.0%)

53% **Americas**
€ 227mn (↘ -8.8%)

5% **APAC**
€ 23mn (↘ -2.2%)

Business types.

Declines compared to the previous year primarily in operations and in components.



48% **Operations**
€ 208mn (↘ -27.1%)

37% **Implementation**
€ 158mn (↘ -2.0%)

15% **Components**
€ 65mn (↘ -22.9%)

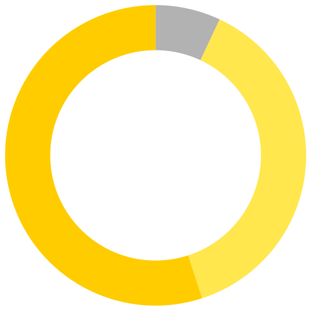
Segments: Income from agreement in Germany visible in the tolling segment.

Tolling reflects the removal of two major operation projects in EMEA and worldwide unexpectedly weak market.

Tolling segment.

All figures in € mn unless otherwise stated.	FY 2024/25	FY 2025/26	+/-
Revenues	**393**	**295**	**-25%**
Implementation	105	104	-1%
Operations	206	127	-38%
Components	83	64	-22%
EBIT	**12**	**8**	**-30%**
EBIT margin	*3%*	*3%*	-0 PP

Revenues in tolling segment by region.



38% **EMEA**
€ 112mn (↘ -41.9%)

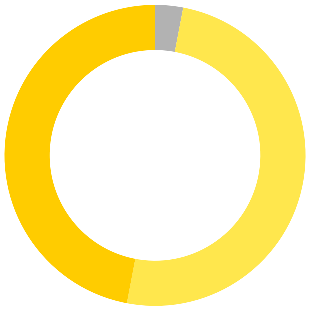
55% **Americas**
€ 163mn (↘ -9.7%)

7% **APAC**
€ 20mn (↗ +1.4%)

Traffic management segment.

All figures in € mn unless otherwise stated.	FY 2024/25	FY 2025/26	+/-
Revenues	**137**	**135**	**-1%**
Implementation	57	55	-4%
Operations	79	80	+1%
Components	1	0	-57%
EBIT	**-5**	**-3**	**+39%**
EBIT margin	*-3%*	*-2%*	+1 PP

Revenues in traffic management segment by region.



50% **EMEA**
€ 68mn (↗ +5.3%)

47% **Americas**
€ 64mn (↘ -6.5%)

3% **APAC**
€ 3mn (↘ -20.2%)

Significant decline in revenues and EBIT.

Germany effect enabled positive EBIT; reduced cost base could not be adjusted in the short term to the now lower revenue level.

All figures in € mn unless otherwise stated.	***FY 2024/25***	***FY 2025/26***	**+/-**
Revenues	**530.3**	**430.6**	**-19%**
Other operating income	29.7*	53.9	+82%
Changes in finished and unfinished goods	1.4	0.2	-84%
Cost of materials and other production services	-198.6	-164.1	-17%
Personnel expenses	-250.6	-230.8	-8%
Other operating expenses	-94.0*	-86.3	-8%
Proportional result of associates and joint ventures	5.6	17.2	> +100%
EBITDA	**23.8***	**20.6**	**-13%**
Amortization, depreciation, impairment charge and write-up from impairments	-16.5	-15.1	-9%
EBIT	**7.3***	**5.6**	**-24%**
EBIT margin	1.4%*	1.3%	-0.1 PP

* *Retrospective adjustment in accordance with IAS 8*

Result for the period attributable to equity holders of € -18.7mn.

Financial result improved compared to previous year.

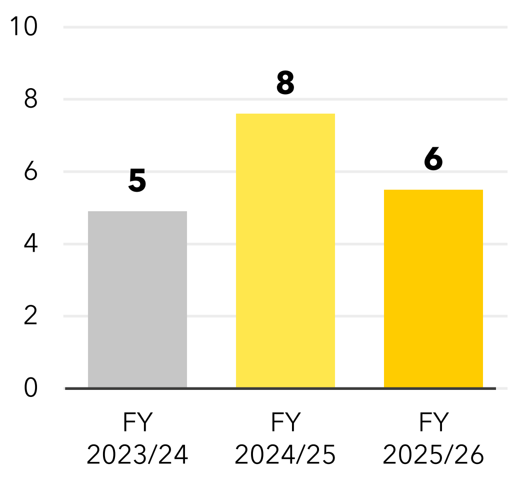
All figures in € mn unless otherwise stated.	**FY 2024/25**	**FY 2025/26**	**+/-**
EBIT	**7.3***	**5.6**	**-24%**
Interest (net result)	-7.2	-6.0	-17%
FX (net result)	-0.5	-2.2	> +100%
Other (net result)	-9.2	-3.2	-66%
Financial result	**-16.9**	**-11.4**	**-33%**
Result before income tax	**-9.6***	**-5.8**	**-40%**
Income tax	1.2	-11.2	–
Result for the period	**-8.4***	**-17.0**	**> -100%**
Non-controlling interests	3.8	1.7	-54%
Result attributable to equity holders	**-12.1***	**-18.7**	**-55%**
Earnings per share (EPS) in €	-0.85*	-1.31	-55%

* *Retrospective adjustment in accordance with IAS 8*

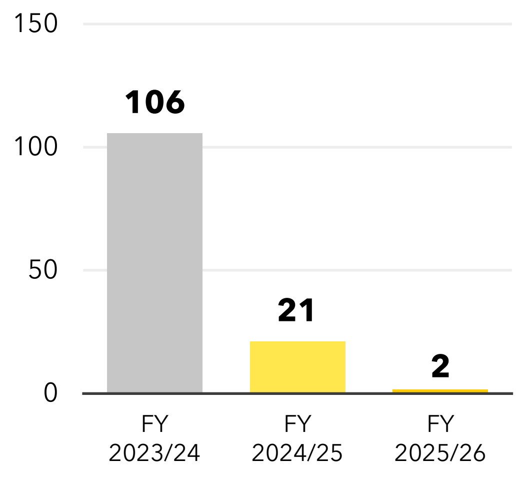
Reduction in liabilities, but also lower cash and cash equivalents.

Cash inflow from Germany mostly used to repay liabilities.

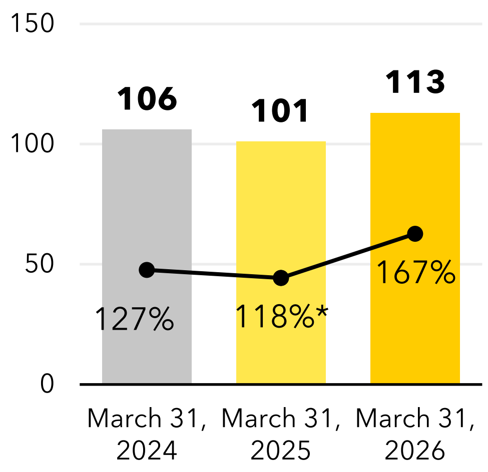
Net investment.



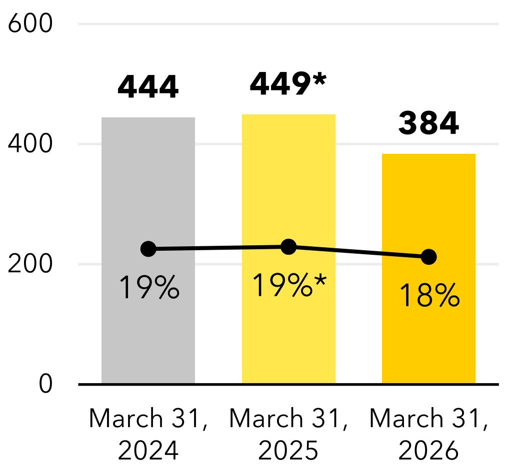
Free cash flow.



Net debt, gearing.



Total assets, equity ratio.



- **Net investment below previous year's level;** new ERP system and relocation of production in North America during the reporting period.
- **Free cash flow positive at € 1.7mn;** net working capital relatively constant.
- **Gearing ratio increased to 167.2%,** mainly due to decline in equity.
- **Equity ratio at 17.7%** below previous year's level.

* *Retrospective adjustment in accordance with IAS 8*

Outlook.

Financial year 2026/27.

Continued strong focus on costs and liquidity.

Revenue growth expected.

Catching up on project delays and a strong order backlog.

EBIT increase expected.

Cost adjustments and efficiency improvements become effective. Additional positive effect expected from the sale of the majority in tolltickets GmbH.

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