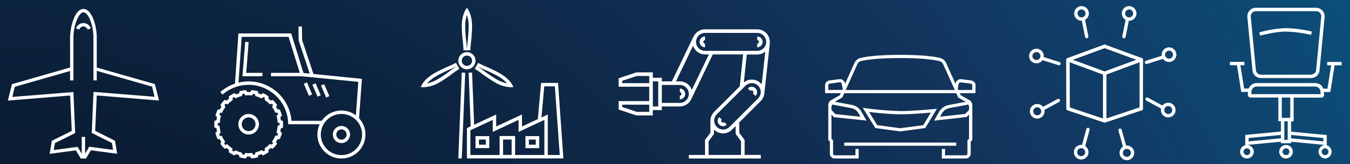
STABILUS



# FY2025 RESULTS

## ANALYST & INVESTOR WEB CONFERENCE
## DECEMBER 8, 2025

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Numbers were rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

# KEY TAKEAWAYS

STABILUS

**We confirm the FY2025 preliminary results** released on November 10, 2025.

Revenue and earnings development in FY2025 strongly affected by **the current market environment, the global tariff conflict, the unfavorable product mix and the higher pricing pressure in the automotive business** as well as the **weak US dollar**.

Revenue in FY2025 on the prior year's level of **around €1.3bn**.

**Adj. EBIT[1] margin in FY2025 at 11.0**%, -1pp y/y.

Net leverage ratio as of end September 2025 stable at 2.96.

The **transformation program** to boost long-term competitiveness is well on track. It will streamline the organizational structure, **reduce personnel and operating costs** and optimize the production footprint.

[1] See list of acronyms in appendix.

# NEW CFO ANDREAS JAEGER

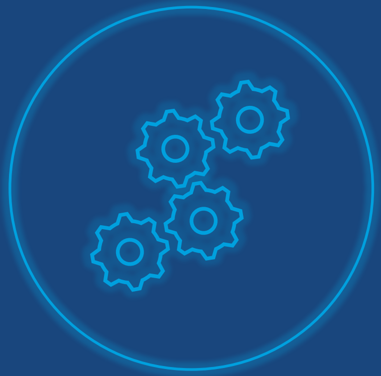



Born 1972, Swiss citizen

**Professional background**
Since Nov 2025: Stabilus Group, CFO
2021-2025: Forbo Group, CFO, Interim CEO
2016-2021: Geberit Group, Head of Corporate Controlling
2006-2016: Holcim Group, various finance functions, CFO of Holcim Ecuador S.A.
Before 2006: PricewaterhouseCoopers, IBM Business Consulting Services

**Professional education**
Bachelor of Business Administration
Swiss Certified Public Accountant
Executive Master in European and International Law

# SHIFTING INTO A HIGHER GEAR ON THE WAY TO OUR PROFITABILITY TARGETS



**Organizational transformation**: adjustments to the organizational structure, reduction of hierarchical layers, alignment of processes to foster stronger customer focus and faster decision-making

**Location-related measures**: consolidation of office and production facilities (e.g., consolidation of our facilities in Germany, the USA, Singapore and Thailand)

**Personnel-related measures**: workforce reduction by around 450 employees (c. 6% of global workforce), predominantly in EMEA and Americas

**Strong commitment to STAR 2030 targets, particularly to delivering an adj. EBIT margin of 15%.**

# PAYBACK TIME OF PLANNED MEASURES LESS THAN 1 YEAR



**c. €18m one-off expenses**, predominantly related to severance payments, consolidation of office and production facilities, and other restructuring costs

› expenses/provision recognized in FY2025

› cash outflow will be largely in FY2026

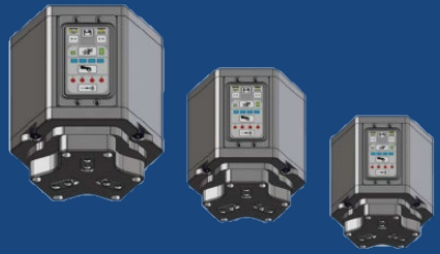
**c. €19m cost savings in FY2027**

**c. €32m recurring annual cost savings from FY2028 onwards**

# A NEW PRODUCT DEVELOPMENT: A NEW E-GRIPPER SERIES

STABILUS

## ELECTRIC SMART 3-JAW GRIPPER



**New product development in the Industrial Automation business unit:**

**A new electric smart 3-jaw gripper** with integrated controls and sensors.

Electric "plug and play" gripper - **easy to handle and to program**.

Life cycle testing and certification ongoing.

Market introduction of the new product in **3 different sizes** planned for Q2 FY26.

Target market: automation equipment and robotics for industrial sectors.

# A NEW INITIATIVE: STABILUS 4 AUTOMATION

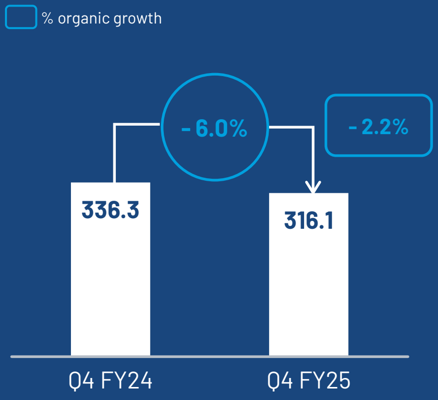
STABILUS

# STABILUS GROUP IN Q4 FY2025

STABILUS

## REVENUE AND EARNINGS IMPACTED BY CURRENT MARKET ENVIRONMENT

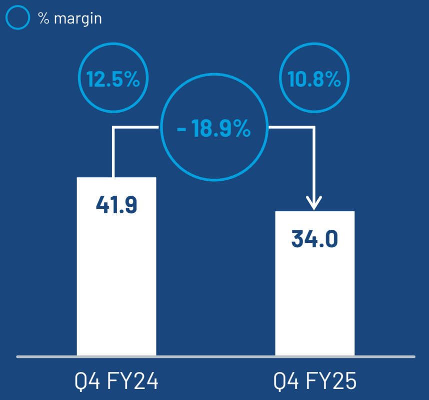
### REVENUE (€M)




**Revenue ▼ 6.0% y/y**

- Organic -2.2%, M&A 0.0%, FX -3.8% y/y
- Lower revenues in Automotive, EC[1] and IMA, partly offset by growth in DIAMEC, HRF, AMR and CV

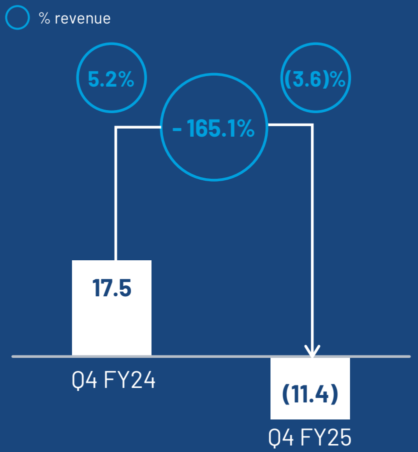
### ADJ. EBIT (€M)




**Adj. EBIT margin ▼ 1.7pp y/y**

- Organic -15.3%, M&A +0.0%, FX -3.6%
- Incurred integration cost €0.0m (PY: €1.8m)

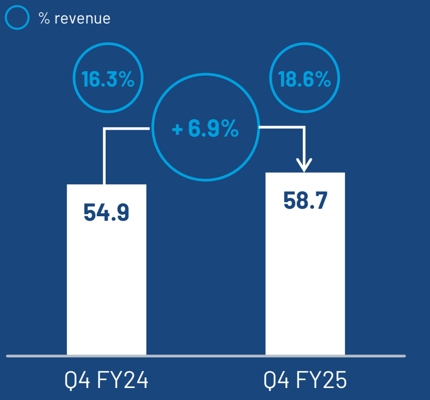
### PROFIT (€M)




**Profit margin ▼ 8.8pp y/y**

- Provision / expenses for transformation of €17.6m
- Higher finance costs (interest expenses and net fx losses)

### ADJ. FCF (€M)




**Adj. FCF % revenue ▲ 2.3pp y/y**

- Adjustments to FCF €2.3m (PY €2.3m)
- Higher cash flow from operations by €2.5m y/y, lower capex by €1.2m y/y

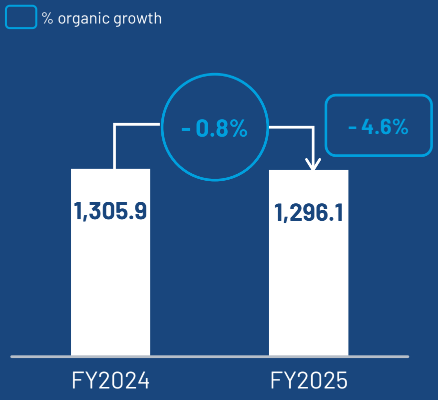
[1] See list of acronyms in appendix.

# STABILUS GROUP IN FY2025

STABILUS

## REVENUE AND EARNINGS IMPACTED BY CURRENT MARKET ENVIRONMENT

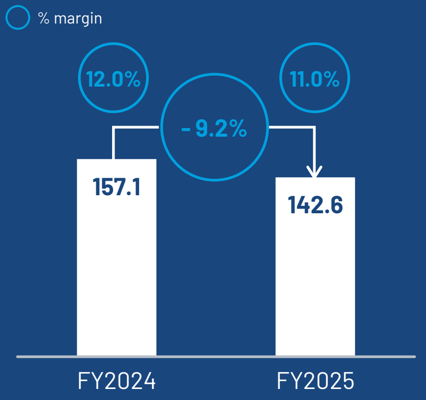
### REVENUE (€M)




**Revenue ▼ 0.8% y/y**

- Organic -4.6%, M&A +7.0%, FX -3.2% y/y
- All market segments are negatively affected; higher revenues only in DIAMEC[1] and IMA y/y; Destaco sales synergies €8.2m

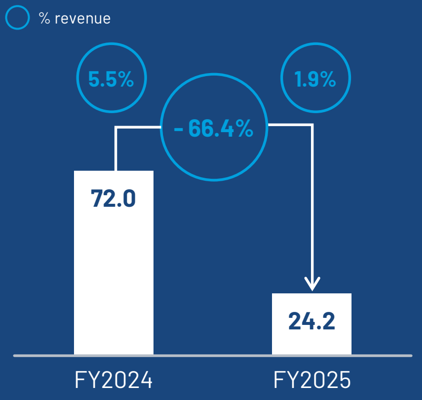
### ADJ. EBIT (€M)




**Adj. EBIT margin ▼ 1.0pp y/y**

- Organic -17.7%, M&A +10.9%, FX -2.4%
- Destaco cost synergies €1.2m
- Incurred integration cost €1.5m (PY: €3.8m)

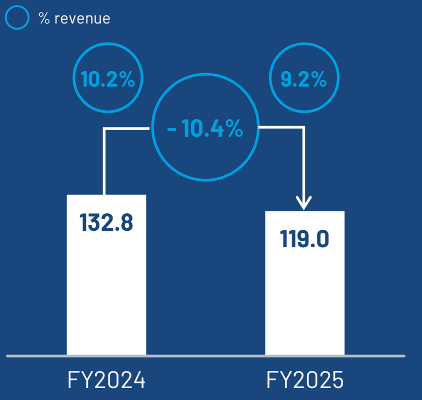
### PROFIT (€M)




**Profit margin ▼ 3.6pp y/y**

- Provision / expenses for transformation of €17.6m
- Higher finance costs (interest expenses and net fx losses)

### ADJ. FCF (€M)




**Adj. FCF % revenue ▼ 1.0pp y/y**

- Adjustments to FCF €8.7m (PY €653.2m)
- Higher capex by €5.6m y/y

[1] See list of acronyms in appendix.

# BUSINESS DEVELOPMENT BY REGION IN Q4 FY25

STABILUS

| | AMERICAS | EMEA | ASIA-PACIFIC |
|---|---|---|---|
| **Revenue** | ▼ **3.2%** y/y | ▲ **3.2%** y/y | ▼ **25.0%** y/y |
| **adj. EBIT margin** | **3.0%**<br>▼ **9.5pp** y/y | **17.8%**<br>▲ **9.5pp** y/y | **11.1%**<br>▼ **7.8pp** y/y |

**Revenue in APAC impacted by pricing pressure in Automotive. Adj. EBIT margin affected by the harmonization of transfer pricing policy (Destaco integration).**

# BUSINESS DEVELOPMENT BY REGION IN FY2025

STABILUS

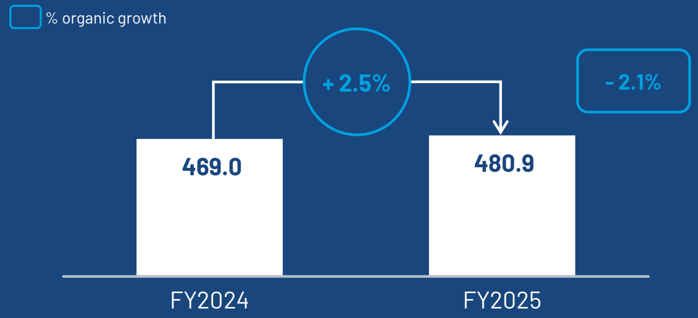
| | AMERICAS | EMEA | ASIA-PACIFIC |
|---|---|---|---|
| **Revenue** | ▲ **2.5%** y/y | ▲ **3.2%** y/y | ▼ **12.4%** y/y |
| **adj. EBIT margin** | **7.9%**<br>▼ **2.3pp** y/y | **12.2%**<br>▲ **1.8pp** y/y | **14.1%**<br>▼ **3.4pp** y/y |

**Twelve months of Destaco results included in FY2025 (vs. six months in FY2024). APAC revenue impacted by higher pricing pressure in Automotive.**

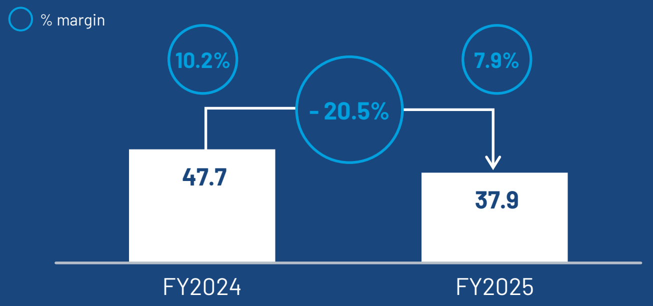
# AMERICAS: HIGHER REVENUES DRIVEN BY ACQUISITION, IMPACTED BY UNCERTAINTY AND WEAK USD

STABILUS

## REVENUE (€M)




## ADJ. EBIT (€M)




**Revenue ▲ 2.5% y/y**

- Organic -2.1%, M&A +11.6%, FX -7.0%
- Lower revenues in Automotive, CV[1], and EC, partially offset by growth in DIAMEC, HRF, AMR and IMA
- 12 months Destaco results included in FY25 vs. 6 months in FY24
- Significant negative impact from weak US dollar (-7.0% y/y)

**Adj. EBIT margin ▼ 2.3pp y/y**

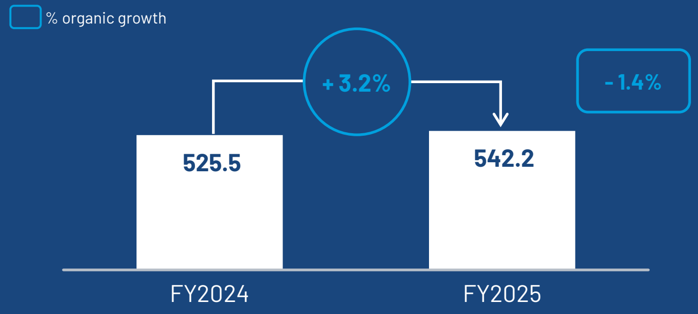
- Organic -36.7%, M&A +21.2%, FX -5.0%
- Margin negatively affected by harmonization of the transfer pricing policy, following the consolidation of Destaco (- €7.9m)

[1] See list of acronyms in appendix.

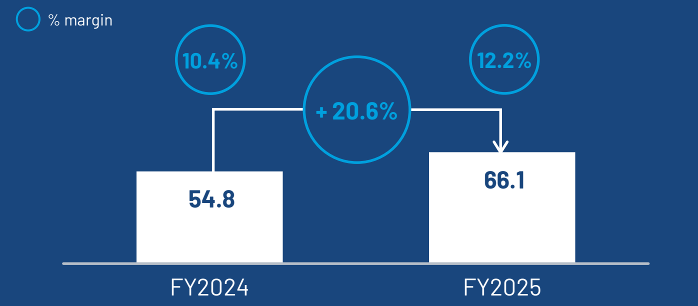
# EMEA: REVENUE INCREASE DRIVEN BY ACQUISITION

STABILUS

## REVENUE (€M)




## ADJ. EBIT (€M)




**Revenue ▲ 3.2% y/y**

- Organic -1.4%, M&A +5.0%, FX -0.4%
- Lower revenues in all market segments except in IMA[1] and DIAMEC
- 12 months Destaco results included in FY25 vs. 6 months in FY24

**Adj. EBIT margin ▲ 1.8pp y/y**

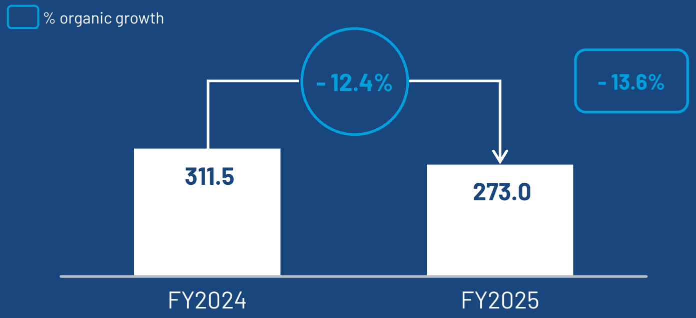
- Organic +12.0%, M&A +9.1%, FX -0.5%
- Margin positively affected by harmonization of the transfer pricing policy, following the consolidation of Destaco (+ €9.6m)

[1] See list of acronyms in appendix.

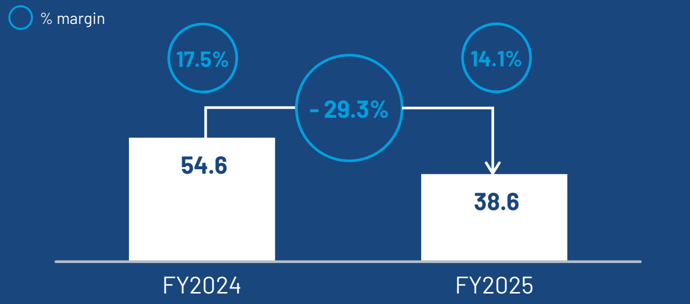
# APAC: RESULTS IMPACTED BY U.S. TARIFF POLICY AND PRICING PRESSURE IN AUTOMOTIVE

STABILUS

## REVENUE (€M)




## ADJ. EBIT (€M)




**Revenue ▼ 12.4% y/y**

- Organic -13.6%, M&A +3.5%, FX -2.3%
- Lower revenues in Automotive, AMR[1], and EC, partially offset by growth in CV and IMA; DIAMEC and EC revenues at prior-year level

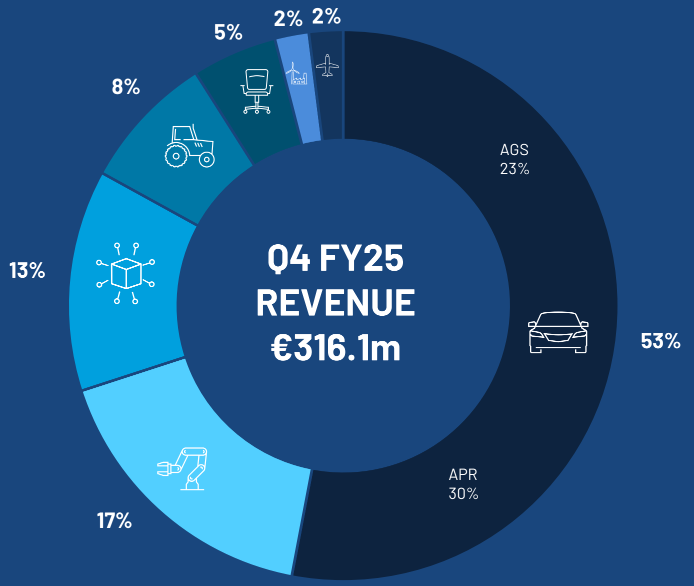
**Adj. EBIT margin ▼ 3.4pp y/y**

- Organic -31.2%, M&A +3.7%, FX -1.8%
- Strong pricing pressure in Automotive
- Margin negatively affected by harmonization of the transfer pricing policy, following the consolidation of Destaco (- €1.7m)

[1] See list of acronyms in appendix.

# BUSINESS DEVELOPMENT BY MARKET SEGMENT IN Q4 FY25

STABILUS

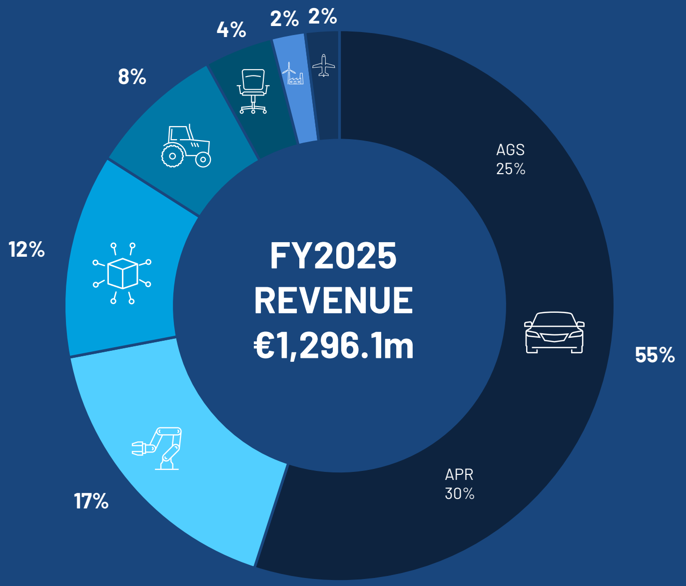



| ICON | MARKET SEGMENT | % CHANGE Y/Y |
|---|---|---|
| | Automotive (AGS and APR) | ▼ 10% |
| | Industrial Machinery & Automation (IMA) | ▼ 4% |
| | Distributors, Independent Aftermarket, E-commerce (DIAMEC) | ▲ 9% |
| | Commercial Vehicles (CV) | ▲ 1% |
| | Health, Recreation & Furniture (HRF) | ▲ 15% |
| | Energy & Construction (EC) | ▼ 35% |
| | Aerospace, Marine & Rail (AMR) | ▲ 16% |

**Despite the challenging market environment, DIAMEC, CV and AMR grew in Q4 FY25.**

# BUSINESS DEVELOPMENT BY MARKET SEGMENT IN FY2025

STABILUS



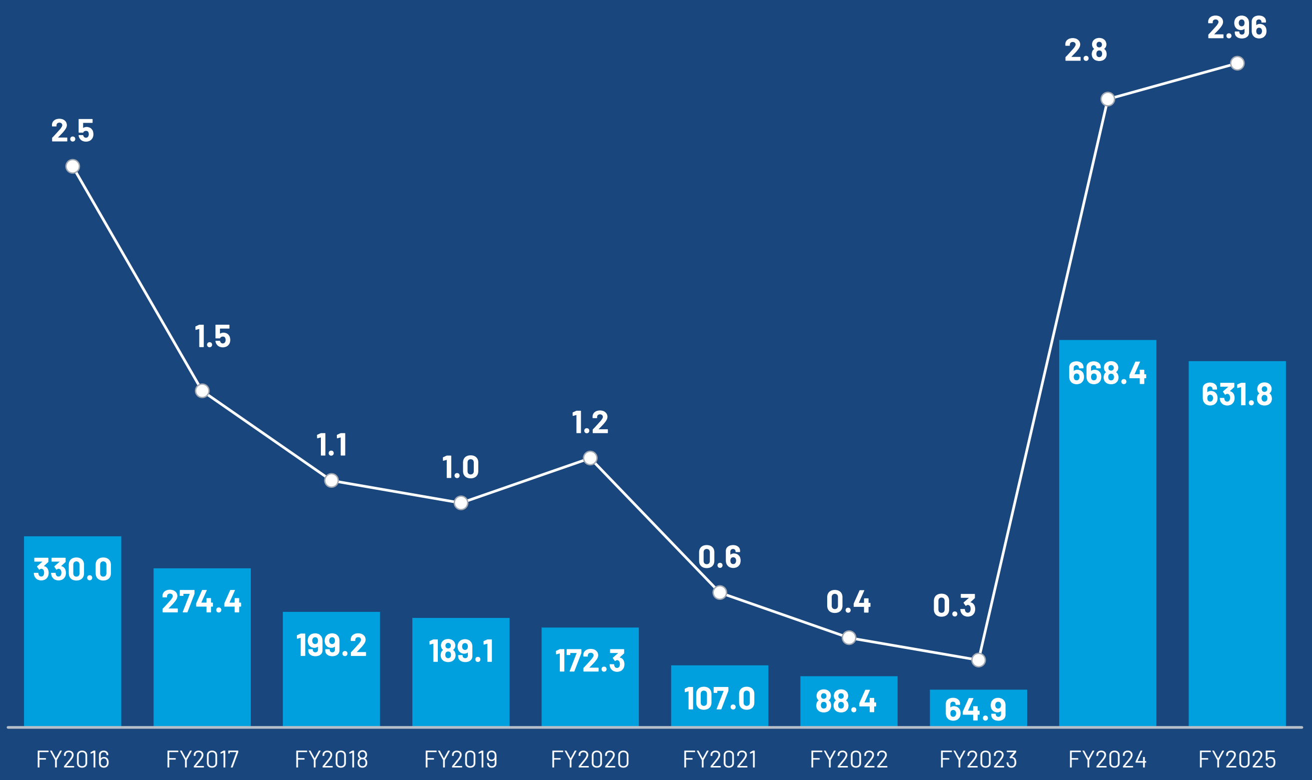

| ICON | MARKET SEGMENT | % CHANGE Y/Y |
|---|---|---|
| | Automotive (AGS and APR) | ▼ 10% |
| | Industrial Machinery & Automation (IMA) | ▲ 61%[1] |
| | Distributors, Independent Aftermarket, E-commerce (DIAMEC) | ▲ 5% |
| | Commercial Vehicles (CV) | ▼ 5% |
| | Health, Recreation & Furniture (HRF) | ▼ 5% |
| | Energy & Construction (EC) | ▼ 23% |
| | Aerospace, Marine & Rail (AMR) | ▲ 0% |

**Despite the challenging market environment, IMA and DIAMEC grew in FY2025.**

[1] The significant increase is due to the consolidation of Destaco from April 2024 (12M Destaco revenue in FY25 vs. 6M in FY24). Change excl. Destaco in FY25 and FY24: +5.8% y/y.

# NET LEVERAGE RATIO AT 2.96 AS OF END SEPT 2025

STABILUS

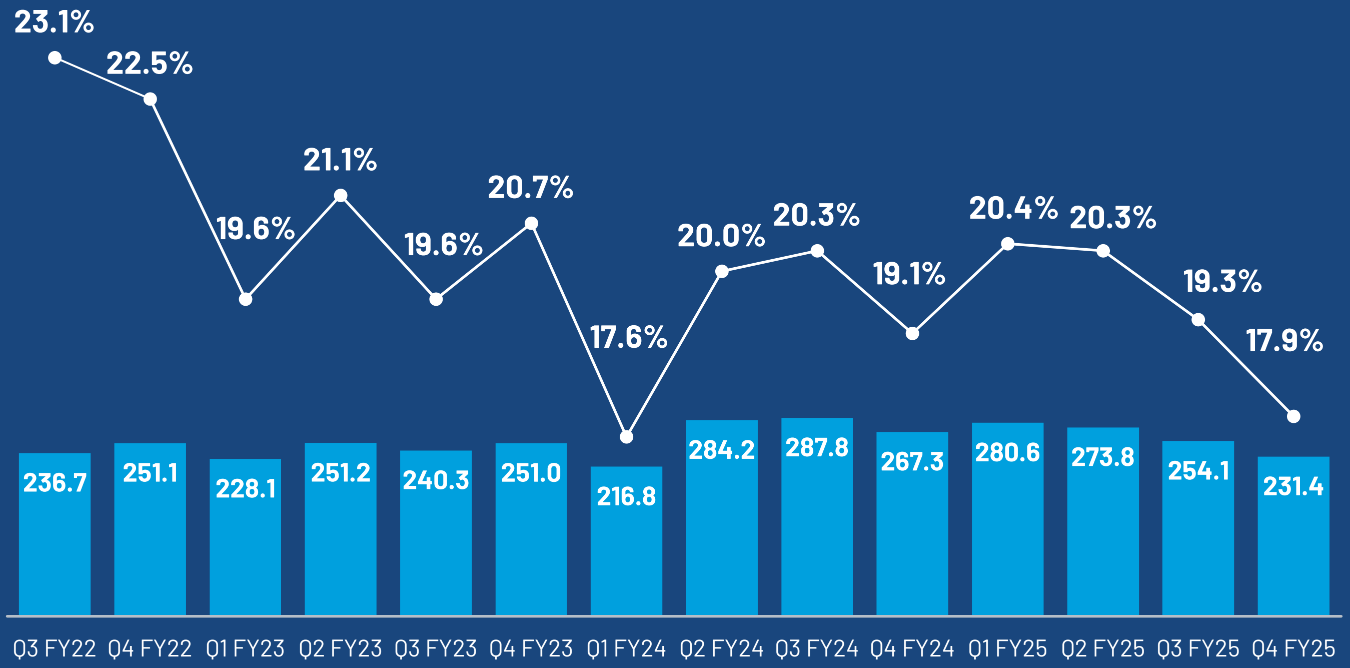



- Our goal is to reduce net leverage ratio below 2.0 within the next three years.
- Our mid-term target leverage ratio is 1.0.

Net financial debt as of end of quarter in €m | Net leverage ratio = net financial debt / LTM adj. EBITDA

# NWC/REVENUE RATIO IMPROVED TO 17.9%

STABILUS

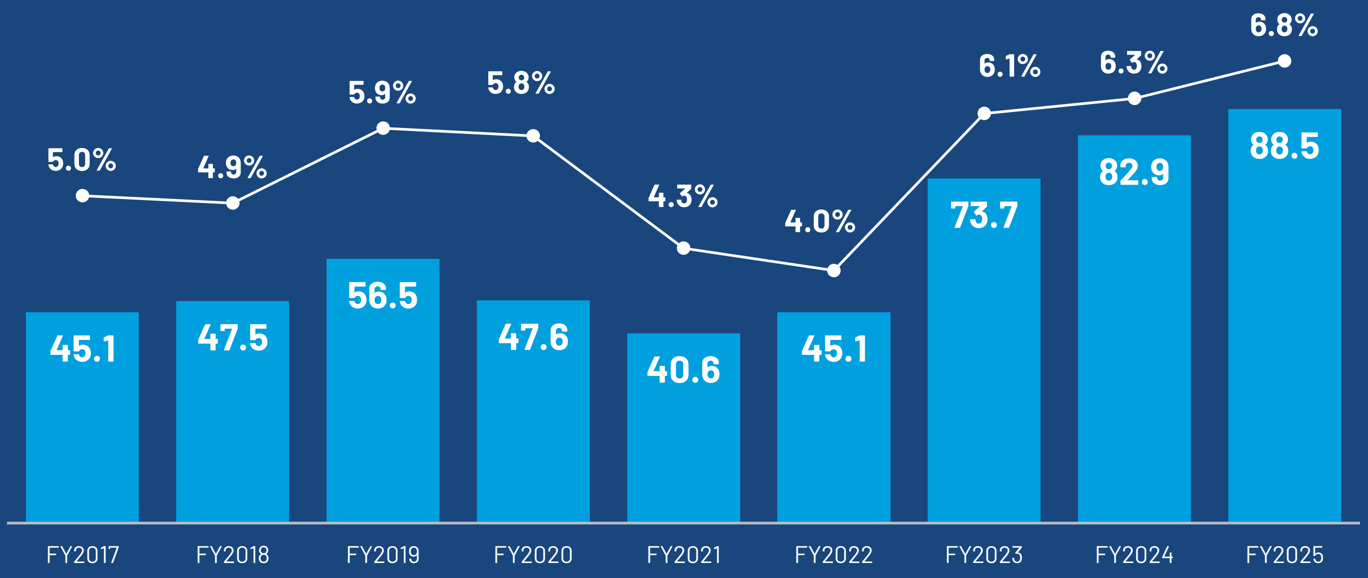



- NWC/revenue ratio substantially improved by 1.4pp q/q to 17.9% as of end FY2025.
- A new ABS factoring program was introduced in August 2025 to optimize working capital.
- Receivables sold under the factoring program as of end Sept 2025: €25.8m (PY: €11.9m).

NWC as of end of quarter in €m | NWC/revenue ratio = NWC in % of LTM revenue

# INVESTMENT FOCUS ON INNOVATIVE NEW PRODUCTS

STABILUS



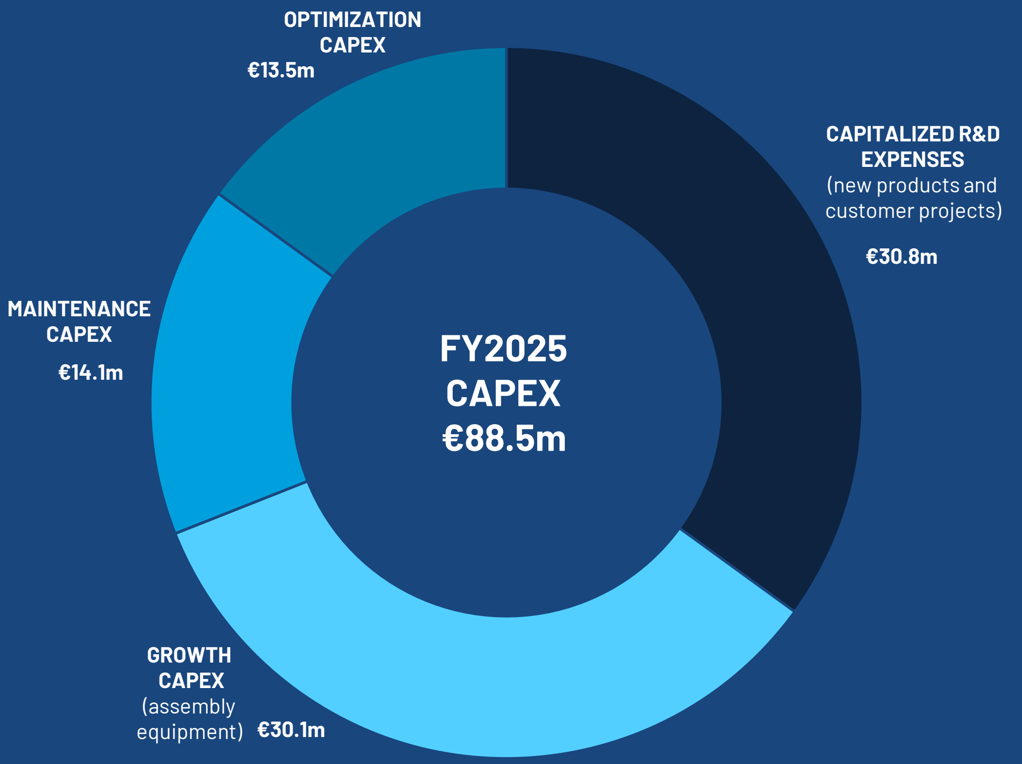

- Important investment projects:
  - radar technology,
  - smart door actuation,
  - electric grippers,
  - automation of production facilities.

Capital expenditure (CAPEX) in €m | Capex in % revenue

# FY2025 CAPEX BY CATEGORY

STABILUS

## MAJOR FOCUS ON R&D AND GROWTH




- The €88.5m capex in FY2025 comprises:
  - €30.8m **capitalized R&D** (35% of total capex; c. 2.4% of group revenue),
  - €30.1m **growth** capex (34% of total capex; c. 2.3% of group revenue),
  - €14.1m **maintenance** capex (16% of total capex; c. 1.1% of group revenue),
  - €13.5m **optimization** capex (15% of total capex; c. 1.0% of group revenue).

# OUTLOOK FOR FY2026

STABILUS

| | FY2025 Actual | FY2026 Forecast |
|---|---|---|
| **Revenue** | €1,296.1m | **€1.1bn - €1.3bn** |
| **Adj. EBIT margin** | 11.0% | **10% - 12%** |
| **Adj. FCF** | €119.0m | **€80m - €110m** |

- The forecast range reflects **difficult market conditions, macroeconomic and geopolitical uncertainties.**

# KEY ASSUMPTIONS FOR FY2026 OUTLOOK

STABILUS

## ASSUMPTIONS FOR THE MID-POINT OF THE FORECAST RANGE

### GDP[1] GROWTH

- c. +3% y/y in CY2025 and CY2026

### COST INFLATION

- material cost (average price for metals, plastics, energy) expected to slightly decrease in FY2026
- labor cost inflation of c. 6% y/y in FY2026

### LVP[1] GROWTH

- LVP of c. 91m in FY2026

### MAJOR FX RATES

- 1.20 USD/EUR
- 8.50 CNY/EUR

[1] See list of acronyms in appendix.

# FORECAST BY OPERATING SEGMENT (REGION)

STABILUS

| | STABILUS GROUP | | AMERICAS | | EMEA | | ASIA-PACIFIC | |
|---|---|---|---|---|---|---|---|---|
| | FY2025 Actual | FY2026 Forecast | FY2025 Actual | FY2026 Forecast | FY2025 Actual | FY2026 Forecast | FY2025 Actual | FY2026 Forecast |
| **Revenue** | €1,296.1m | €1.1bn - €1.3bn (-15.1% - +0.3%) | €480.9m | €400m - €460m (-16.8% - -4.3%) | €542.2m | €500m - €570m (-7.8% - +5.1%) | €273.0m | €200m - €270m (-26.8% - -1.1%) |
| **Adj. EBIT margin** | 11.0% | 10.0% - 12.0% | 7.9% | 9.0% - 11.0% | 12.2% | 10.0% - 11.5% | 14.1% | 12.0% - 14.5% |

## ASSUMPTIONS (FOR MID-POINT OF FORECAST RANGE):

- GPD[1] growth in USA c. 2%, in the Euro area c. 1.5%, in China c. 4% in CY2026
- Lower LVP in all three regions y/y: Americas (-2%), EMEA (-2%), APAC (-3%)
- High **labor cost inflation in Romania and Mexico**
- **High price pressure in the automotive business in China**

[1] See list of acronyms in appendix.

# FURTHER PARAMETER EXPECTATIONS FOR FY2026

STABILUS

## HOUSEKEEPING ITEMS

### PPA D&A[1]

- c. €30m in FY2026 (thereof c. €16m Destaco PPA D&A)
- gradually reducing to c. €28m in FY2029 (thereof c. €16m Destaco PPA D&A)

### CAPEX[1]

- c. €60m machine capex (investments in PPE)

### TRANSFORMATION PROGRAM

- c. €18m one-off cash out in FY2026
- c. €19m cost savings in FY2027, c. €32m recurring annual cost savings from FY2028 onwards

### NWC[1]

- 17% - 20% of LTM revenue

### GROUP TAX RATE

- 25% - 30%

### DIVIDEND POLICY

- payout of 20% to 40% of consolidated net profit attributable to Stabilus shareholders, subject to market conditions, our growth and deleveraging plans

[1] See list of acronyms in appendix.

# SUMMARY AND OUTLOOK



The FY2025 revenue and earnings development was **significantly impacted** by the current market environment and the US tariff policy.

To the 2026 AGM we will propose **a dividend of €0.35 per share** (a total dividend of €8.6m and distribution ratio of c. 37% of group net income).

Given **the geopolitical and macroeconomic uncertainties**, we expect FY2026 to be challenging and forecast for this fiscal year group revenues of €1.1bn - €1.3bn, adj. EBIT margin of 10% - 12% and adj. FCF of €80m - €110m.

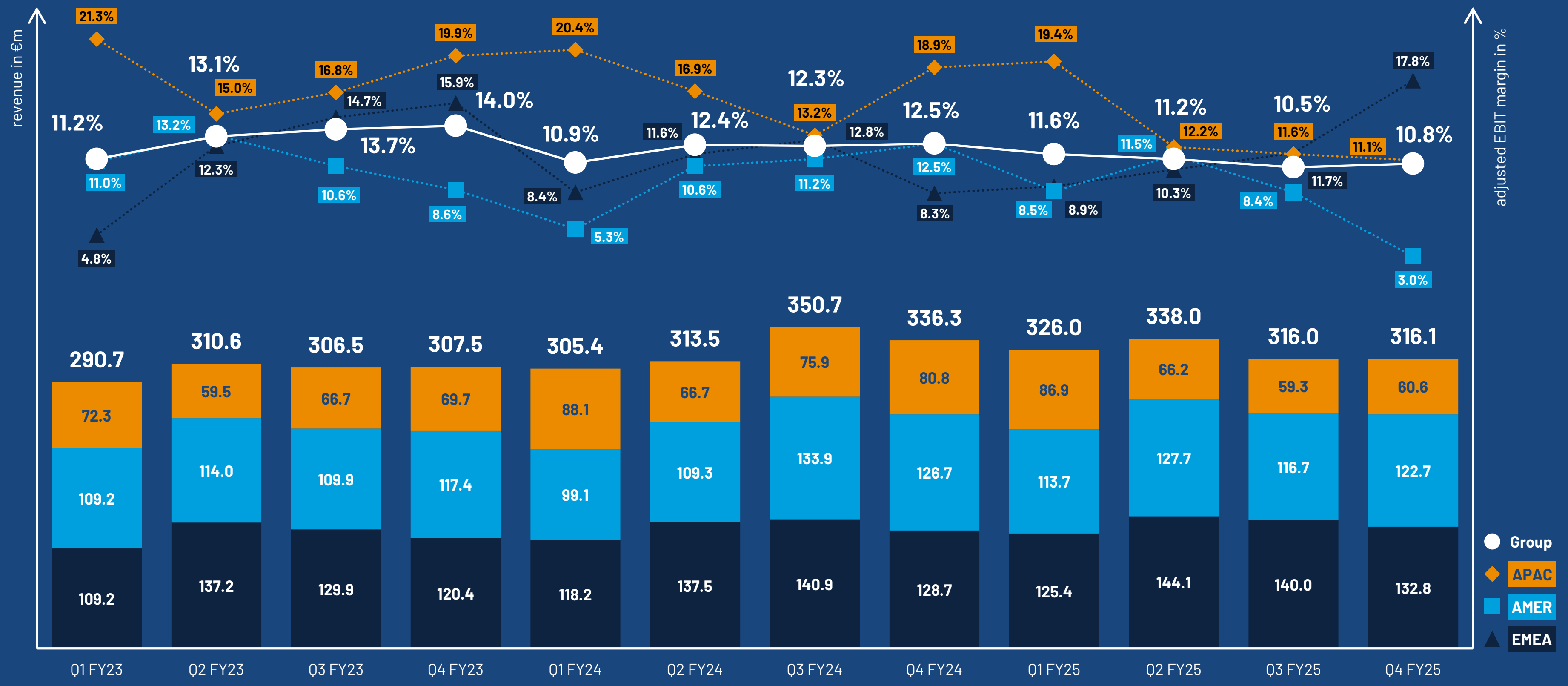
Despite the headwinds, **we continue to pursue our long-term strategy STAR 2030**, focusing on profitable and sustainable growth, customer and employee satisfaction, innovation and sustainability.

# Q&A SESSION

# APPENDIX

# REVENUE AND ADJUSTED EBIT MARGIN BY QUARTER

STABILUS



# REVENUE

STABILUS

## THREE MONTHS ENDED SEPTEMBER 30, 2025

### REVENUE (€M)

| | Q4 FY2024 Actual | Q4 FY2025 Actual | Change | % change | Acquisition effect | Currency effect | Organic growth |
|---|---|---|---|---|---|---|---|
| Automotive Gas Spring | 29.3 | 25.6 | (3.7) | (12.6)% | 0.0% | 0.0% | (12.6)% |
| Automotive Powerise | 25.5 | 29.0 | 3.5 | 13.7% | 0.0% | (2.1)% | 15.8% |
| Industrial Components | 60.6 | 66.6 | 6.0 | 9.9% | 0.0% | (1.0)% | 10.9% |
| Industrial Automation (Destaco) | 13.3 | 11.6 | (1.7) | (12.8)% | 0.0% | (0.2)% | (12.6)% |
| **EMEA** | **128.7** | **132.8** | **4.1** | **3.2%** | **0.0%** | **(0.9)%** | **4.1%** |
| Automotive Gas Spring | 29.4 | 27.4 | (2.0) | (6.8)% | 0.0% | (5.0)% | (1.8)% |
| Automotive Powerise | 37.4 | 36.4 | (1.0) | (2.7)% | 0.0% | (4.1)% | 1.4% |
| Industrial Components | 34.1 | 31.0 | (3.1) | (9.1)% | 0.0% | (6.9)% | (2.2)% |
| Industrial Automation (Destaco) | 25.8 | 27.9 | 2.1 | 8.1% | 0.0% | (6.7)% | 14.8% |
| **AMERICAS** | **126.7** | **122.7** | **(4.0)** | **(3.2)%** | **0.0%** | **(5.6)%** | **2.4%** |
| Automotive Gas Spring | 25.2 | 21.7 | (3.5) | (13.9)% | 0.0% | (6.2)% | (7.7)% |
| Automotive Powerise | 41.8 | 29.0 | (12.8) | (30.6)% | 0.0% | (5.2)% | (25.4)% |
| Industrial Components | 6.3 | 6.5 | 0.2 | 3.2% | 0.0% | (6.8)% | 10.0% |
| Industrial Automation (Destaco) | 7.5 | 3.4 | (4.1) | (54.7)% | 0.0% | (3.4)% | (51.3)% |
| **APAC** | **80.8** | **60.6** | **(20.2)** | **(25.0)%** | **0.0%** | **(5.5)%** | **(19.5)%** |
| Total Automotive Gas Spring (AGS) | 83.9 | 74.7 | (9.2) | (11.0)% | 0.0% | (3.6)% | (7.4)% |
| Total Automotive Powerise (APR) | 104.7 | 94.4 | (10.3) | (9.8)% | 0.0% | (4.1)% | (5.7)% |
| Total Industrial Components (IC) | 101.0 | 104.1 | 3.1 | 3.1% | 0.0% | (3.3)% | 6.4% |
| Total Industrial Automation (Destaco) | 46.6 | 42.9 | (3.7) | (7.9)% | 0.0% | (4.3)% | (3.6)% |
| **Total** | **336.3** | **316.1** | **(20.2)** | **(6.0)%** | **0.0%** | **(3.8)%** | **(2.2)%** |

# REVENUE

STABILUS

## YEAR ENDED SEPTEMBER 30, 2025

### REVENUE (€M)

| | FY2024 Actual | FY2025 Actual | Change | % change | Acquisition effect | Currency effect | Organic growth |
|---|---|---|---|---|---|---|---|
| Automotive Gas Spring | 124.5 | 117.7 | (6.8) | (5.5)% | 0.0% | 0.0% | (5.5)% |
| Automotive Powerise | 111.5 | 112.6 | 1.1 | 1.0% | 0.0% | (0.8)% | 1.8% |
| Industrial Components | 261.5 | 261.9 | 0.4 | 0.2% | 0.0% | (0.5)% | 0.7% |
| Industrial Automation (Destaco) | 27.9 | 50.0 | 22.1 | 79.2% | 94.3% | 0.2% | (15.3)% |
| **EMEA** | **525.5** | **542.2** | **16.7** | **3.2%** | **5.0%** | **(0.4)%** | **(1.4)%** |
| Automotive Gas Spring | 118.8 | 108.1 | (10.7) | (9.0)% | 0.0% | (6.3)% | (2.7)% |
| Automotive Powerise | 161.1 | 138.1 | (23.0) | (14.3)% | 0.0% | (11.1)% | (3.2)% |
| Industrial Components | 136.4 | 126.8 | (9.6) | (7.0)% | 0.0% | (4.0)% | (3.0)% |
| Industrial Automation (Destaco) | 52.7 | 107.9 | 55.2 | 104.7% | 103.2% | (4.0)% | 5.5% |
| **AMERICAS** | **469.0** | **480.9** | **11.9** | **2.5%** | **11.6%** | **(7.0)%** | **(2.1)%** |
| Automotive Gas Spring | 106.2 | 96.6 | (9.6) | (9.0)% | 0.0% | (2.4)% | (6.6)% |
| Automotive Powerise | 166.2 | 133.7 | (32.5) | (19.6)% | 0.0% | (2.2)% | (17.4)% |
| Industrial Components | 24.3 | 25.0 | 0.7 | 2.9% | 0.0% | (2.8)% | 5.7% |
| Industrial Automation (Destaco) | 14.8 | 17.7 | 2.9 | 19.6% | 74.3% | (2.1)% | (52.6)% |
| **APAC** | **311.5** | **273.0** | **(38.5)** | **(12.4)%** | **3.5%** | **(2.3)%** | **(13.6)%** |
| Total Automotive Gas Spring (AGS) | 349.5 | 322.4 | (27.1) | (7.8)% | 0.0% | (2.9)% | (4.9)% |
| Total Automotive Powerise (APR) | 438.8 | 384.4 | (54.4) | (12.4)% | 0.0% | (5.1)% | (7.3)% |
| Total Industrial Components (IC) | 422.2 | 413.7 | (8.5) | (2.0)% | 0.0% | (1.8)% | (0.2)% |
| Total Industrial Automation (Destaco) | 95.4 | 175.6 | 80.2 | 84.1% | 96.1% | (2.5)% | (9.5)% |
| **Total** | **1,305.9** | **1,296.1** | **(9.8)** | **(0.8)%** | **7.0%** | **(3.2)%** | **(4.6)%** |

# ADJUSTED EBIT

STABILUS

## THREE AND TWELVE MONTHS ENDED SEPTEMBER 30, 2025

### ADJUSTED EBIT (€M)

| | Q4 FY2024 Actual | Q4 FY2025 Actual | Change | % change | Acquisition effect | Currency effect | Organic change |
|---|---|---|---|---|---|---|---|
| EMEA | 10.7 | 23.6 | 12.9 | 120.6% | 0.0% | (1.9)% | 122.5% |
| AMERICAS | 15.9 | 3.7 | (12.2) | (76.7)% | 0.0% | (3.8)% | (72.9)% |
| APAC | 15.3 | 6.7 | (8.6) | (56.2)% | 0.0% | (4.6)% | (51.6)% |
| **Total** | **41.9** | **34.0** | **(7.9)** | **(18.9)%** | **0.0%** | **(3.6)%** | **(15.3)%** |

| | FY2024 Actual | FY2025 Actual | Change | % change | Acquisition effect | Currency effect | Organic change |
|---|---|---|---|---|---|---|---|
| EMEA | 54.8 | 66.1 | 11.3 | 20.6% | 9.1% | (0.5)% | 12.0% |
| AMERICAS | 47.7 | 37.9 | (9.8) | (20.5)% | 21.2% | (5.0)% | (36.7)% |
| APAC | 54.6 | 38.6 | (16.0) | (29.3)% | 3.7% | (1.8)% | (31.2)% |
| **Total** | **157.1** | **142.6** | **(14.5)** | **(9.2)%** | **10.9%** | **(2.4)%** | **(17.7)%** |

# P&L AND ADJUSTED EBIT

STABILUS

## THREE MONTHS ENDED SEPTEMBER 30, 2025

### P&L (€M)

| | Q4 FY2024 Actual | Q4 FY2025 Actual | Change | % change |
|---|---|---|---|---|
| Revenue | 336.3 | 316.2 | (20.1) | (6.0)% |
| Cost of sales | (245.8) | (232.4) | 13.4 | (5.5)% |
| **Gross Profit** | **90.5** | **83.8** | **(6.7)** | **(7.4)%** |
| *% margin* | *26.9%* | *26.5%* | | |
| R&D expenses | (8.4) | (9.1) | (0.7) | 8.3% |
| Selling expenses | (40.3) | (33.3) | 7.0 | (17.4)% |
| Administrative expenses | (20.0) | (16.1) | 3.9 | (19.5)% |
| Other income/expenses | 1.2 | (19.8) | (21.0) | <(100.0)% |
| **EBIT** | **22.9** | **5.5** | **(17.4)** | **(76.0)%** |
| *% margin* | *6.8%* | *1.7%* | | |
| Finance income/costs | 0.2 | (13.8) | (14.0) | <(100.0)% |
| **EBT** | **23.1** | **(8.3)** | **(31.4)** | **<(100.0)%** |
| *% margin* | *6.9%* | *(2.6)%* | | |
| Income tax | (5.5) | (3.1) | 2.4 | (43.6)% |
| **Profit** | **17.5** | **(11.4)** | **(28.9)** | **<(100.0)%** |
| *% margin* | *5.2%* | *(3.6)%* | | |
| *EPS in €* | *0.70* | *(0.46)* | *(1.16)* | *<(100.0)%* |

### ADJUSTED EBIT (€M)

| | Q4 FY2024 Actual | Q4 FY2025 Actual | Change | % change |
|---|---|---|---|---|
| **EBIT** | **22.9** | **5.5** | **(17.4)** | **(76.0)%** |
| PPA adj. - D&A | 18.2 | 7.6 | (10.6) | (58.2)% |
| Reorganization | - | 2.0 | 2.0 | n/a |
| Advisory costs | 0.8 | - | (0.8) | (100.0)% |
| PPA adjustments | - | - | - | n/a |
| Environmental protection | - | 1.4 | 1.4 | n/a |
| Restructuring | - | 17.6 | 17.6 | n/a |
| Total adjustments | **19.0** | **28.5** | **9.5** | **50.0%** |
| **Adjusted EBIT** | **41.9** | **34.0** | **(7.9)** | **(18.9)%** |
| *% margin* | *12.5%* | *10.8%* | | |

# P&L AND ADJUSTED EBIT

STABILUS

## YEAR ENDED SEPTEMBER 30, 2025

## P&L (€M)

| | FY2024 Actual | FY2025 Actual | Change | % change |
|---|---|---|---|---|
| Revenue | 1,305.9 | 1,296.1 | (9.8) | (0.8)% |
| Cost of sales | (963.6) | (943.9) | 19.7 | (2.0)% |
| **Gross Profit** | **342.3** | **352.2** | **9.9** | **2.9%** |
| *% margin* | *26.2%* | *27.2%* | | |
| R&D expenses | (34.4) | (38.9) | (4.5) | 13.1% |
| Selling expenses | (126.2) | (136.2) | (10.0) | 7.9% |
| Administrative expenses | (77.7) | (76.4) | 1.3 | (1.7)% |
| Other income/expenses | 9.3 | (16.4) | (25.7) | <(100.0)% |
| **EBIT** | **113.3** | **84.3** | **(29.0)** | **(25.6)%** |
| *% margin* | *8.7%* | *6.5%* | | |
| Finance income/costs | (13.0) | (43.2) | (30.2) | >100.0% |
| **EBT** | **100.4** | **41.1** | **(59.3)** | **(59.1)%** |
| *% margin* | *7.7%* | *3.2%* | | |
| Income tax | (28.3) | (16.9) | 11.4 | (40.3)% |
| **Profit** | **72.0** | **24.2** | **(47.8)** | **(66.4)%** |
| *% margin* | *5.5%* | *1.9%* | | |
| *EPS in €* | *2.84* | *0.93* | *(1.91)* | *(67.3)%* |

## ADJUSTED EBIT (€M)

| | FY2024 Actual | FY2025 Actual | Change | % change |
|---|---|---|---|---|
| **EBIT** | **113.3** | **84.3** | **(29.0)** | **(25.6)%** |
| PPA adj. - D&A | 30.3 | 33.3 | 2.9 | 9.8% |
| Reorganization | - | 5.0 | 5.0 | n/a |
| Advisory costs | 14.2 | 1.1 | (13.1) | (92.3)% |
| PPA adjustments | (0.7) | - | 0.7 | (100.0)% |
| Environmental protection | - | 1.4 | 1.4 | n/a |
| Restructuring | - | 17.6 | 17.6 | n/a |
| Total adjustments | **43.8** | **58.3** | **14.5** | **33.1%** |
| **Adjusted EBIT** | **157.1** | **142.6** | **(14.5)** | **(9.2)%** |
| *% margin* | *12.0%* | *11.0%* | | |

# BALANCE SHEET

STABILUS

## SEPTEMBER 30, 2025

## BALANCE SHEET (€M)

| | Sept 2024 Actual | Sept 2025 Actual | Change | % change |
|---|---|---|---|---|
| Property, plant and equipm. | 300.3 | 303.9 | 3.6 | 1.2% |
| Goodwill | 540.0 | 526.6 | (13.4) | (2.5)% |
| Other intangible assets | 477.9 | 450.4 | (27.5) | (5.8)% |
| Other investments | 6.0 | 6.0 | - | 0.0% |
| Inventories | 223.6 | 204.4 | (19.2) | (8.6)% |
| Trade receivables | 203.4 | 176.1 | (27.3) | (13.4)% |
| Other assets | 50.3 | 50.5 | 0.2 | 0.4% |
| Cash | 109.4 | 162.6 | 53.2 | 48.6% |
| **Total assets** | **1,910.9** | **1,880.5** | **(30.4)** | **(1.6)%** |
| | | | | |
| **Equity incl. minorities** | 677.7 | 635.8 | (41.9) | (6.2)% |
| Debt (incl. accrued interest) | 777.8 | 794.4 | 16.6 | 2.1% |
| Pension plans | 47.3 | 44.9 | (2.4) | (5.1)% |
| Deferred tax liabilities | 64.2 | 60.0 | (4.2) | (6.5)% |
| Trade payables | 159.7 | 149.0 | (10.7) | (6.7)% |
| Other liabilities | 184.2 | 196.4 | 12.2 | 6.6% |
| **Total equity and liabilities** | **1,910.9** | **1,880.5** | **(30.4)** | **(1.6)%** |

# CASH FLOW

STABILUS

# THREE MONTHS ENDED SEPTEMBER 30, 2025

## CASH FLOW STATEMENT (€M)

| | Q4 FY2024 Actual | Q4 FY2025 Actual | Change | % change |
|---|---|---|---|---|
| Cash flow from operating activities | 74.7 | 77.2 | 2.5 | 3.3% |
| Cash flow from investing activities | (22.0) | (20.8) | 1.2 | (5.5)% |
| Cash flow from financing activities | (80.7) | (19.5) | 61.2 | (75.8)% |
| **Net increase / (decrease) in cash** | **(28.0)** | **36.8** | **64.8** | **<(100.0)%** |
| Effect of movements in exchange rates | (1.8) | (0.4) | 1.4 | (77.8)% |
| Cash as of beginning of the period | 139.4 | 126.2 | (13.2) | (9.5)% |
| **Cash as of end of the period** | **109.4** | **162.6** | **53.2** | **48.6%** |

## ADJ. FCF (€M)

| | Q4 FY2024 Actual | Q4 FY2025 Actual | Change | % change |
|---|---|---|---|---|
| Cash flow from operating activities | 74.7 | 77.2 | 2.5 | 3.3% |
| Cash flow from investing activities | (22.0) | (20.8) | 1.2 | (5.5)% |
| **Free cash flow** | **52.7** | **56.4** | **3.7** | **7.0%** |
| Adjustments | 2.3 | 2.3 | - | 0.0% |
| **Adj. FCF** | **54.9** | **58.7** | **3.7** | **6.9%** |

# CASH FLOW

STABILUS

## YEAR ENDED SEPTEMBER 30, 2025

### CASH FLOW STATEMENT (€M)

| | FY2024 Actual | FY2025 Actual | Change | % change |
|---|---|---|---|---|
| Cash flow from operating activities | 197.0 | 196.5 | (0.5) | (0.3)% |
| Cash flow from investing activities | (717.4) | (86.2) | 631.2 | (88.0)% |
| Cash flow from financing activities | 440.7 | (52.3) | (493.0) | <(100.0)% |
| **Net increase / (decrease) in cash** | **(79.7)** | **57.9** | **137.6** | **<(100.0)%** |
| Effect of movements in exchange rates | (3.9) | (4.8) | (0.9) | 23.1% |
| Cash as of beginning of the period | 193.1 | 109.4 | (83.7) | (43.3)% |
| **Cash as of end of the period** | **109.4** | **162.6** | **53.2** | **48.6%** |

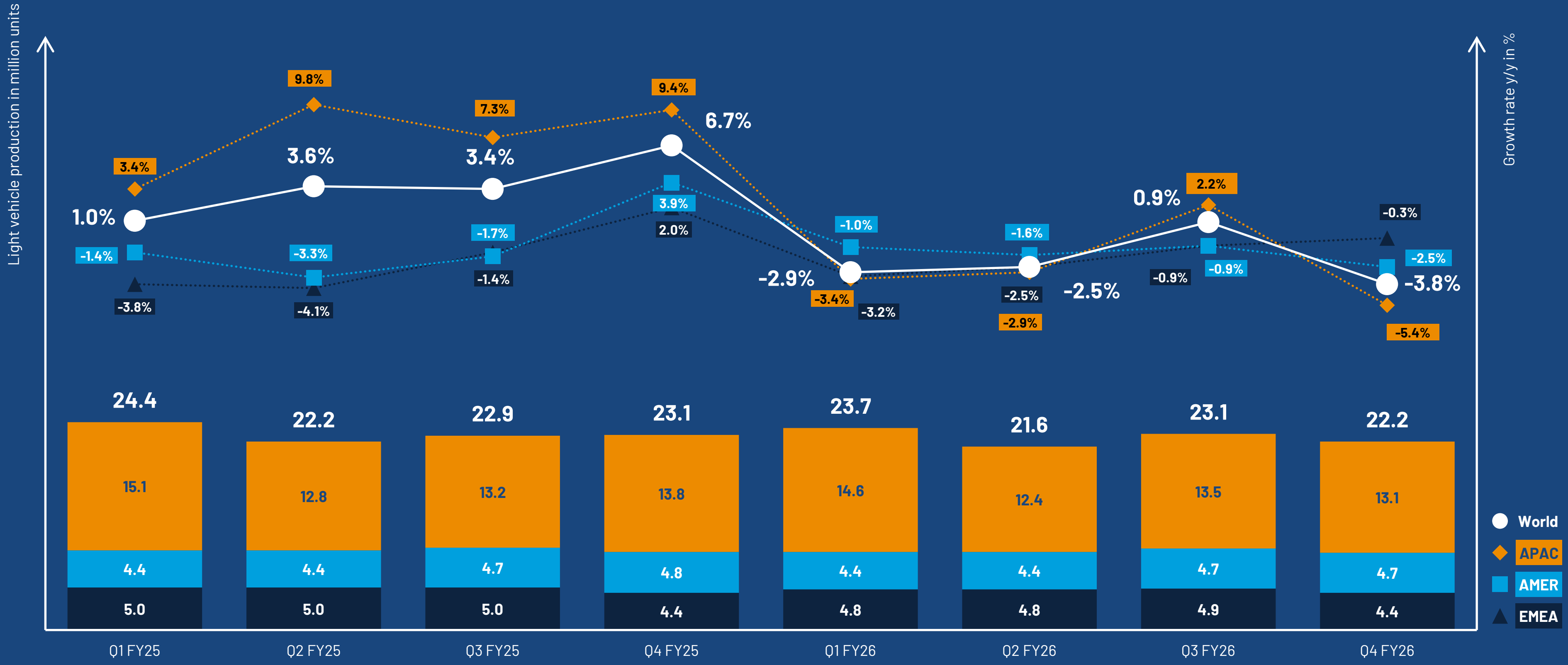
### ADJ. FCF (€M)

| | FY2024 Actual | FY2025 Actual | Change | % change |
|---|---|---|---|---|
| Cash flow from operating activities | 197.0 | 196.5 | (0.5) | (0.3)% |
| Cash flow from investing activities | (717.4) | (86.2) | 631.2 | (88.0)% |
| **Free cash flow** | **(520.4)** | **110.3** | **630.7** | **<(100.0)%** |
| Adjustments | 653.2 | 8.7 | (644.5) | (98.7)% |
| **Adj. FCF** | **132.8** | **119.0** | **(13.8)** | **(10.4)%** |

# LVP DEVELOPMENT / FORECAST

STABILUS

## QUARTERLY VIEW: Q1 FY25 – Q4 FY26

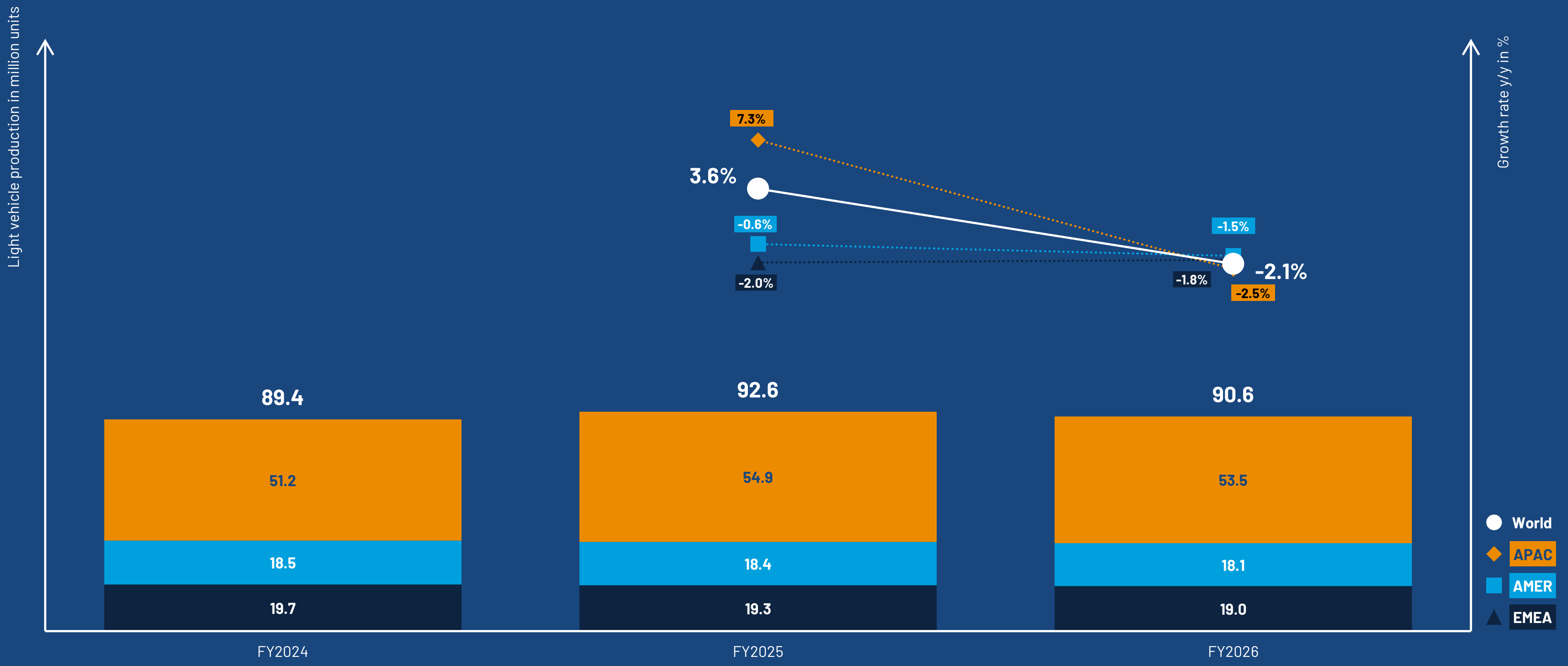



Source: leading market forecast institutes, November 2025

# LVP DEVELOPMENT / FORECAST

STABILUS

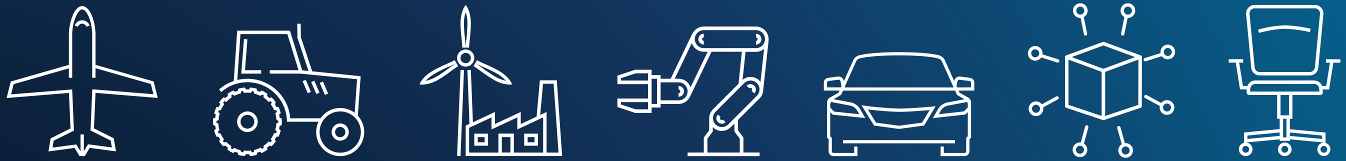
## YEARLY VIEW: FY2024 – FY2026




Source: leading market forecast institutes, November 2025

# ACRONYMS AND ABBREVIATIONS

| | |
|---|---|
| **Adj.** | Adjusted |
| **AGS** | Automotive Gas Spring |
| **AMR** | Aerospace, Marine & Rail |
| **APAC** | Asia-Pacific |
| **APR** | Automotive Powerise |
| **bp** | Basis point |
| **CAPEX** | Capital expenditure |
| **CV** | Commercial Vehicles |
| **CY** | Calendar year |
| **D&A** | Depreciation and amortization |
| **DIAMEC** | Distributors, Independent Aftermarket, E-commerce |
| **EMEA** | Europe, Middle East & Africa |
| **EBIT** | Earnings before interest and taxes |
| **EBITDA** | Earnings before interest, taxes, depreciation and amortization |
| **EBT** | Earnings before taxes |
| **EC** | Energy & Construction |
| **FCF** | Free cash flow |
| **FX** | Foreign exchange, currency effect |
| **FY** | Fiscal year |
| **GDP** | Gross domestic product |
| **HRF** | Health, Recreation & Furniture |
| **IMA** | Industrial Machinery & Automation |
| **LTM** | Last twelve months |
| **LVP** | Light vehicle production |
| **M&A** | Mergers & Acquisitions, acquisition effect |
| **NLR** | Net leverage ratio |
| **NWC** | Net working capital |
| **pp** | Percentage point |
| **PPA** | Purchase price allocation |
| **PPE** | Property, plant and equipment |
| **Prelim** | Preliminary |
| **PY** | Prior year |
| **q/q** | Quarter-on-quarter |
| **y/y** | Year-on-year |



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