

Q2 FY2026 RESULTS

ANALYST & INVESTOR WEB CONFERENCE
MAY 4, 2026

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

NEAR-TERM RESILIENCE – LONG-TERM STRATEGY INTACT



Streamlining industrial footprint in Asia, new plant in Suzhou.

New business wins in North America's independent aftermarket for electromechanical drives.

Expansion of defense applications; secured orders in mid-single-digit million range.

Investment in STAR 2030 growth platforms; developing **solutions for the fast-growing robotics market – Stabilus4Automation.**

Largely completed personnel-related measures (one of the three pillars of the transformation program).

Higher resilience due to Stabilus' diversified product portfolio and "local for local" approach.

STABLE MARGIN, DESPITE LOWER REVENUE IN Q2 FY26 Y/Y



REVENUE

€304.9m

(PY: €338.0m)



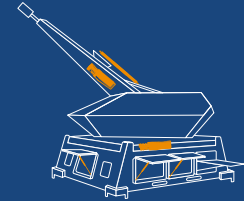
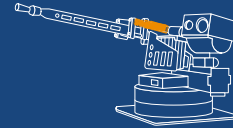
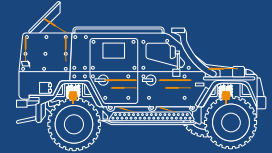
ADJ. EBIT MARGIN

11.2%

(PY:11.2%)

SELECT PRODUCT APPLICATIONS IN DEFENSE

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- › **Orders in mid-single-digit euro million range** secured at Enforce Tac security trade fair, scheduled for the phased delivery through the end of FY2027.
- › Expected **revenue with defense applications** of the Industrial Components business unit (i.e., largely dampers and gas springs) of €3.2m in FY2025 **to triple by FY2030**.

INAUGURATION OF A NEW PLANT IN SUZHOU, CHINA

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COMBINING INDUSTRIAL EXPERT BRANDS IN CHINA





Higher level of **competition and pricing pressure in automotive markets**, particularly in APAC¹. In Q2 FY26, global light vehicle production (LVP) round 3% below the prior-year level.

Unfavorable currency translation effects, primarily from USD and CNY conversion.

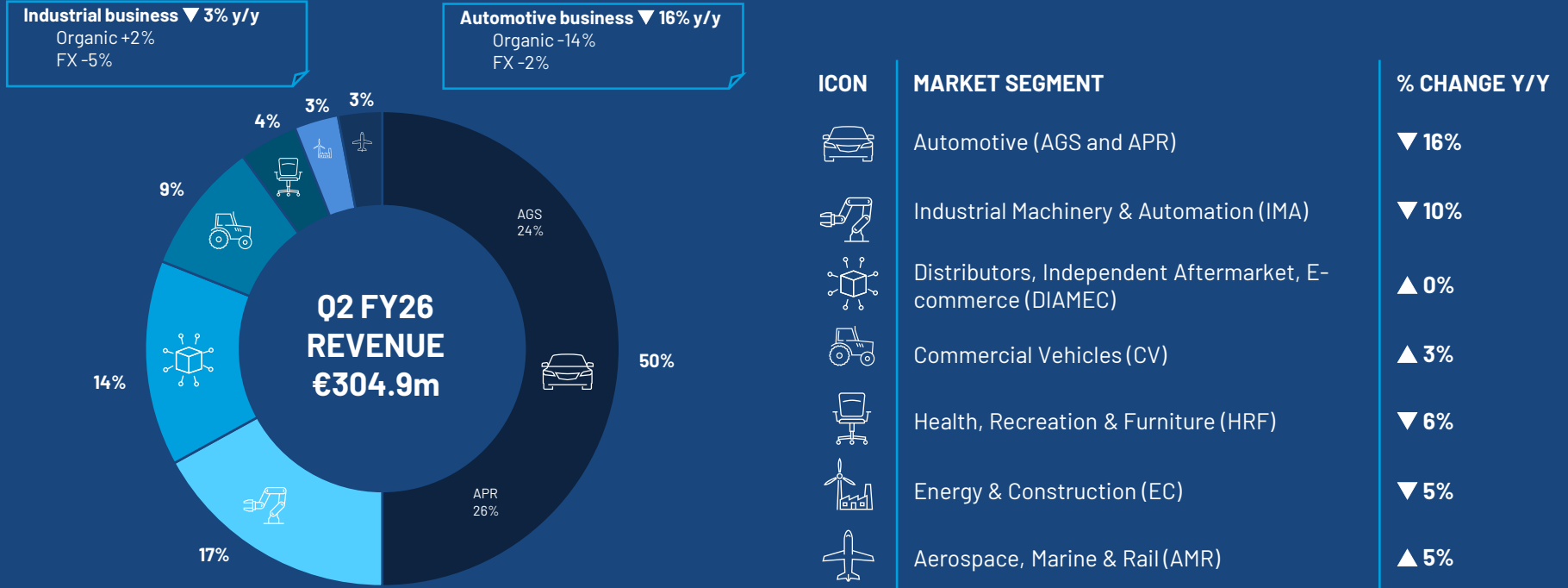
Continuing **subdued customer sentiment in industrial market segments** with lower willingness to invest in capital goods, amid a mixed industrial production environment with slight declines in the EU and stronger growth in the US and China.

Higher risk of **supply chain disruptions** due to the current conflicts in the Middle East. **Inflationary and economic risks** on the rise, growing **concerns about global economic growth**.

¹ See a list of acronyms in appendix.

BUSINESS DEVELOPMENT BY MARKET SEGMENT

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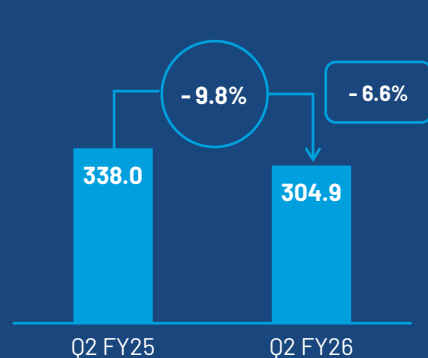


Revenue affected by unfavorable currency effects. Organic development in diversified industrial business more resilient than in automotive.

REVENUE AND EARNINGS IMPACTED BY CURRENT MARKET ENVIRONMENT

REVENUE (€M)

□ % organic growth



Revenue ▼ 9.8% y/y

- › Organic -6.6%, FX -3.2% y/y
- › Soft automotive business, predominantly in APAC¹ and Americas
- › Destaco revenue synergies €2.4m

ADJ. EBIT (€M)

○ % margin

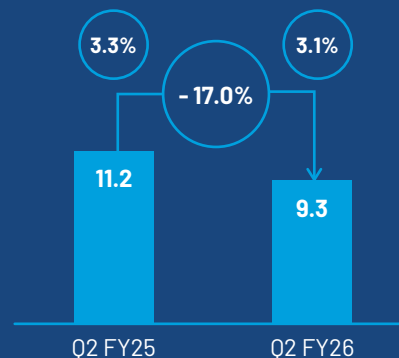


Adj. EBIT margin ▲ 0bp y/y

- › Organic -5.8%, FX -3.7% y/y
- › Reduction of R&D, selling and administrative expenses by €7.6m y/y, driven by the stringent execution of the transformation program
- › Destaco cost synergies €0.6m

PROFIT (€M)

○ % revenue

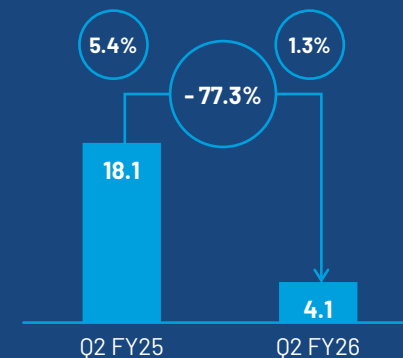


Profit margin ▼ 20bp y/y

- › Profit from operating activities (EBIT) down by €1.3m y/y
- › Higher finance costs by €0.1m and higher income tax expenses by €0.4m y/y

ADJ. FCF (€M)

○ % revenue



Adj. FCF % revenue ▼ 4.1pp y/y

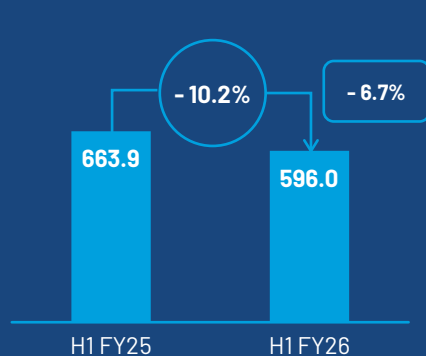
- › Adjustments to FCF €4.7m (PY €2.0m)
- › Lower cash inflow from operations by €23.0m y/y due to higher NWC, in particular higher trade accounts receivable as of end March 2026

¹ See a list of acronyms in appendix.

REVENUE AND EARNINGS IMPACTED BY CURRENT MARKET ENVIRONMENT

REVENUE (€M)

□ % organic growth

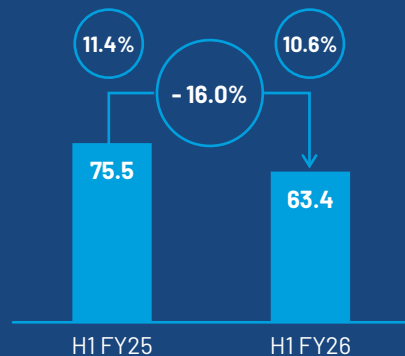


Revenue ▼ 10.2% y/y

- › Organic -6.7%, FX -3.5% y/y
- › Soft automotive business, predominantly in APAC
- › Destaco revenue synergies €4.1m

ADJ. EBIT (€M)

○ % margin

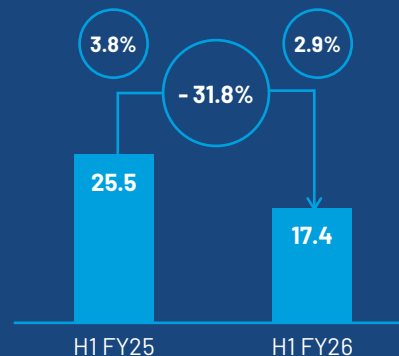


Adj. EBIT margin ▼ 80bp y/y

- › Organic -12.3%, FX -3.7% y/y
- › Reduction of R&D, selling and administrative costs by €14.3m y/y, driven by the stringent execution of the transformation program
- › Destaco cost synergies €1.1m

PROFIT (€M)

○ % revenue

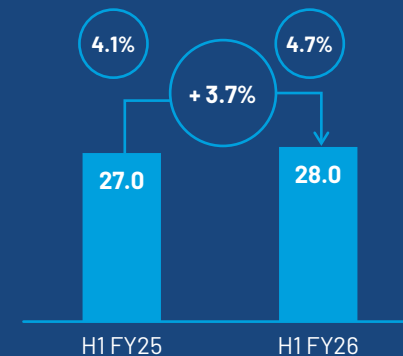


Profit margin ▼ 90bp y/y

- › Profit from operating activities (EBIT) down by €8.3m y/y
- › Higher finance costs by €2.4m and lower income tax expenses by €2.7m y/y

ADJ. FCF (€M)

○ % revenue

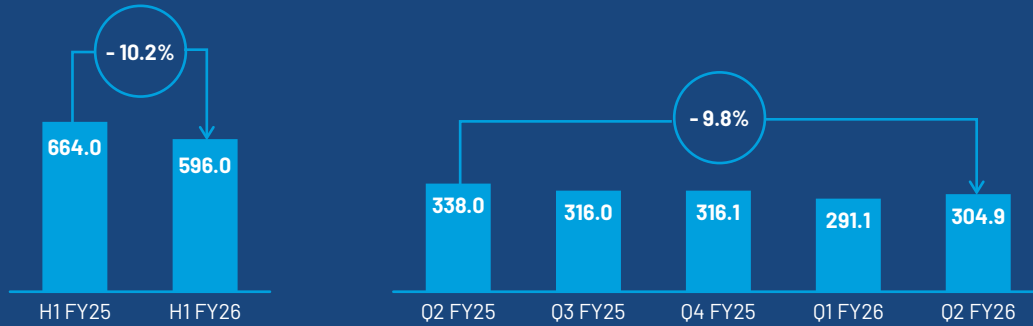


Adj. FCF % revenue ▲ 60bp y/y

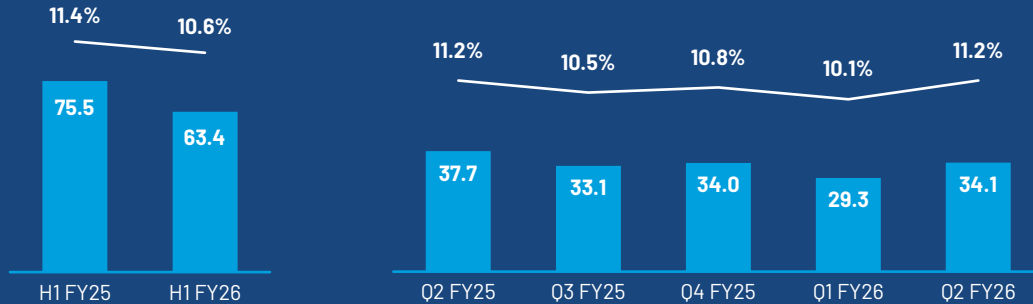
- › Adjustments to FCF €6.5m (PY €4.0m)
- › Lower cash inflow from operations by €15.1m y/y, lower cash outflow for investing activities by €13.6m y/y

STABILUS GROUP: STABLE MARGIN, DESPITE LOWER REVENUE IN Q2 FY26 Y/Y

REVENUE (€M)



ADJ. EBIT (€M) AND ADJ. EBIT MARGIN (%)



Organic **-6.6%** FX **-3.2%**



Lower revenues primarily in Automotive business units.



Organic growth in Industrial Components by 4.0% y/y.



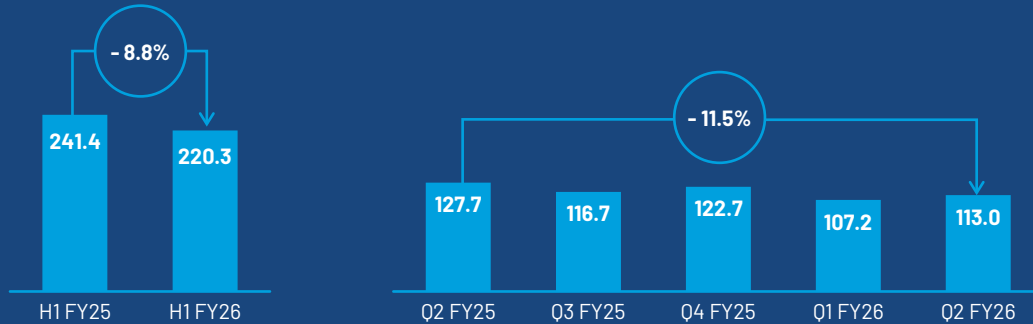
Q2 margin **11.2%** Change y/y **0.0pp**



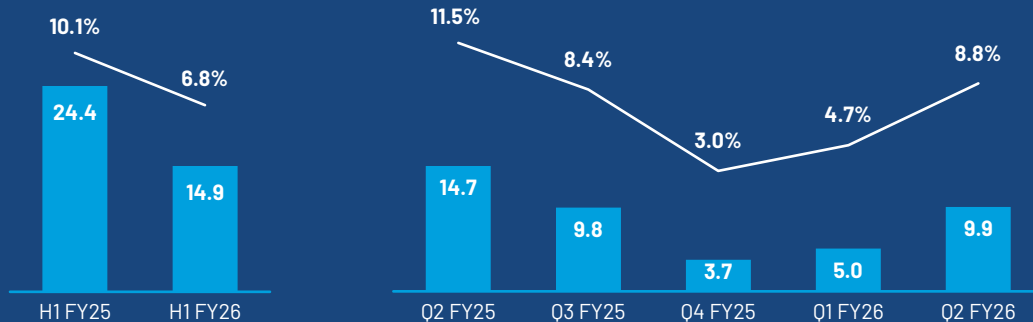
Stable margin y/y, improved margin q/q due to effective and stringent cost management as well as first cost savings from ongoing transformation program.

AMERICAS: REVENUE AND EARNINGS IMPACTED BY WEAK US DOLLAR AND SOFTER AUTOMOTIVE BUSINESS

REVENUE (€M)



ADJ. EBIT (€M) AND ADJ. EBIT MARGIN (%)



Organic **-6.8%** FX **-4.7%**



Lower revenues predominantly in Automotive business units.



Organic growth y/y:
Industrial Components +1.9%,
Industrial Automation (Destaco) +6.0%.



Q2 margin **8.8%** Change y/y **-2.7pp**



Higher workforce turnover in US and Mexican gas spring operations impacting efficiency; specific measures taken to address these issues led to improvements over the last three quarters.

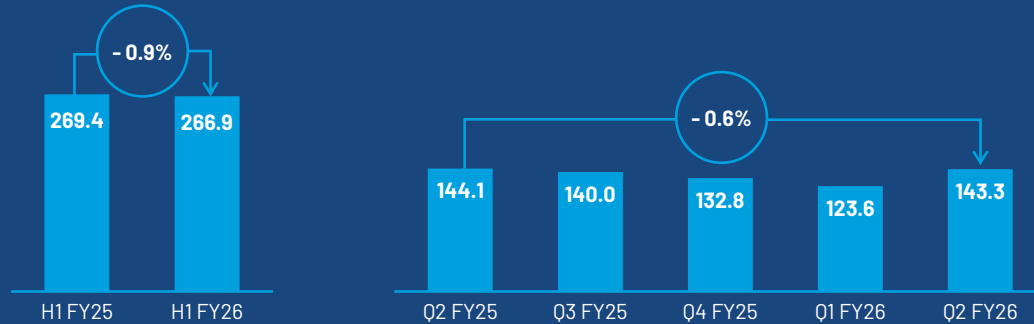


Continuing margin recovery in the last three quarters, supported by cost savings from the ongoing transformation program.

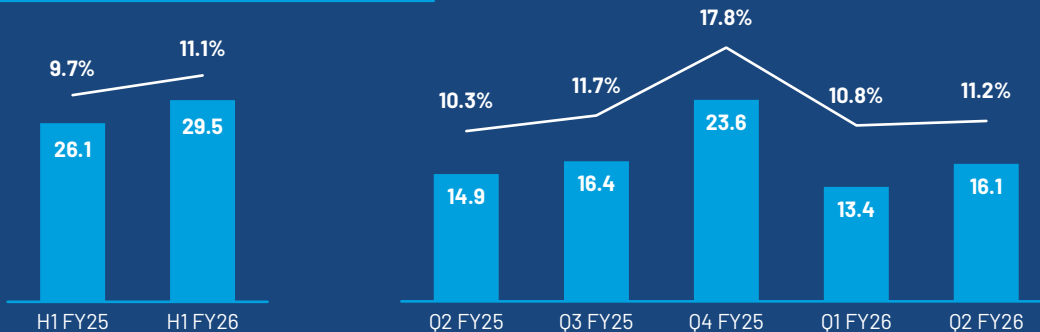
EMEA: MARGIN IMPROVEMENT AT STABLE REVENUE

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REVENUE (€M)



ADJ. EBIT (€M) AND ADJ. EBIT MARGIN (%)



Organic **+0.4%** FX **-1.0%**



Lower revenues primarily at Industrial Automation (Destaco) business unit.



Organic growth y/y:
Industrial Components +4.3%,
Automotive Powerise +0.9%.



Q2 margin **11.2%** Change y/y **+0.9pp**

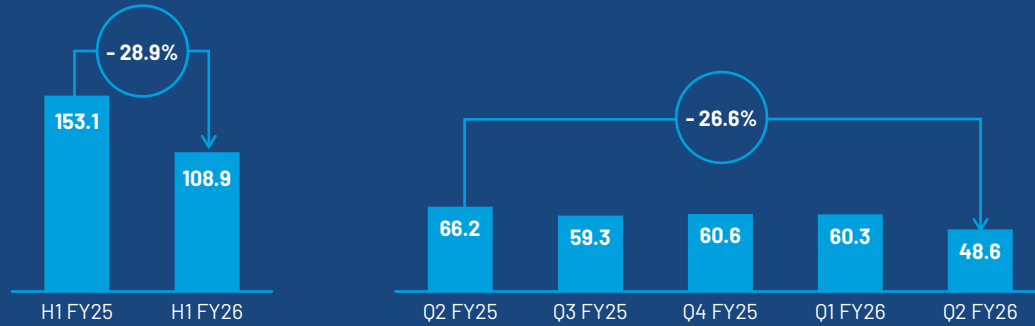


Margin improvement by 90bp y/y, including cost savings from ongoing transformation program.

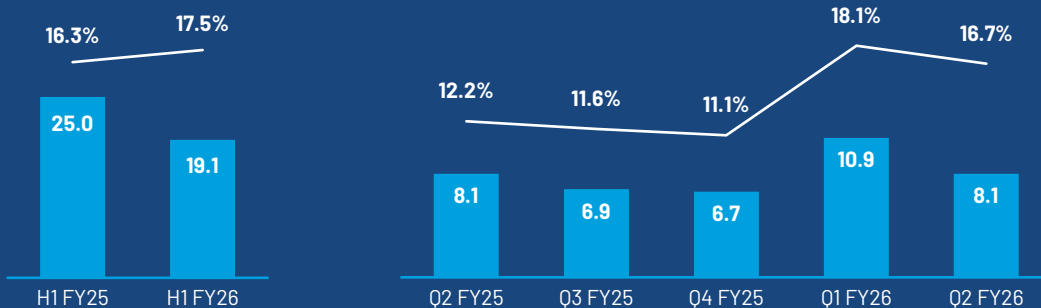
APAC: MARGIN IMPROVEMENT DESPITE LOWER VOLUMES AND UNFAVORABLE CURRENCY EFFECTS

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REVENUE (€M)



ADJ. EBIT (€M) AND ADJ. EBIT MARGIN (%)



Organic **-21.5%** FX **-5.1%**



Lower revenues in Automotive business units, especially in Automotive Powerise.



Organic growth in Industrial Components by 11.2% y/y.



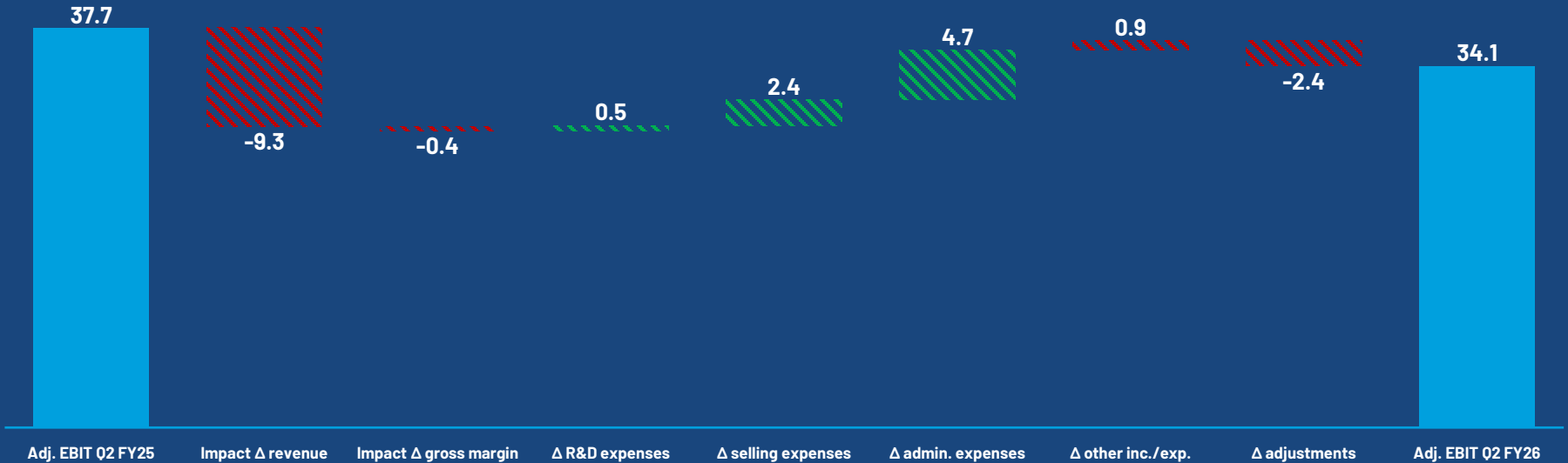
Q2 margin **16.7%** Change y/y **+4.5pp**



Significant margin increase y/y; effective cost management and a few one-time savings leading to higher adj. EBIT margin y/y and offsetting negative volume and currency impacts.

EFFECTIVE COST MANAGEMENT OFFSETTING NEGATIVE VOLUME IMPACT AND PROTECTING EBIT MARGIN

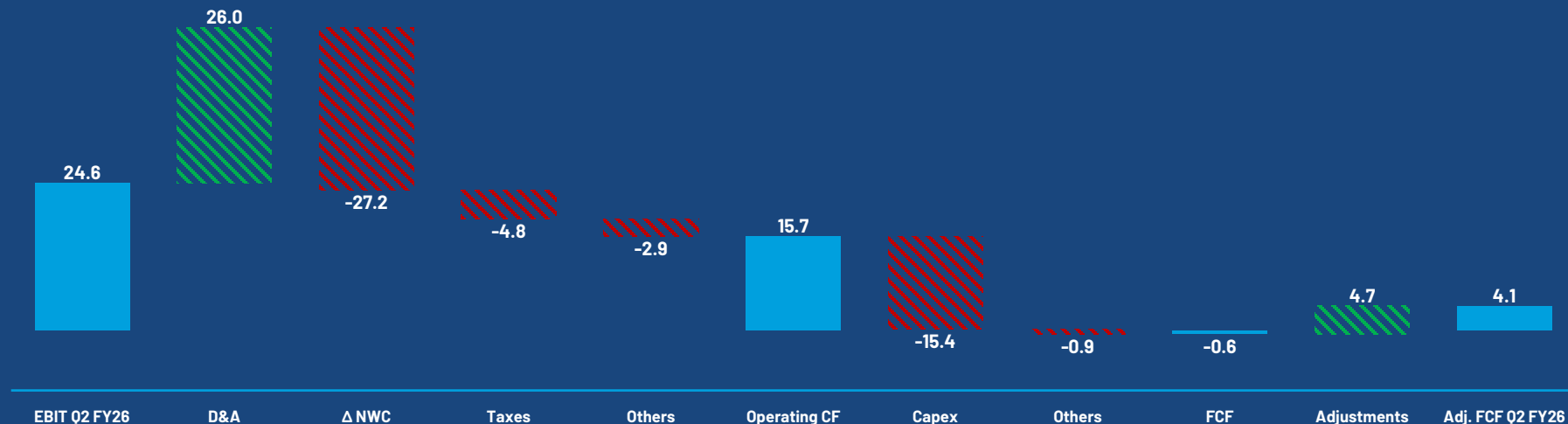
Q2 FY25 – Q2 FY26 ADJ. EBIT BRIDGE (€M)



- › Stable gross margin at 27.6% in Q2 FY26 (PY: 27.7%), despite revenue dip of €33.1m and, as a result, gross profit reduction by €9.3m y/y (impact of revenue change).
- › In addition, significant reduction in overhead costs (administrative, selling and R&D expenses) leads to a stable adj. EBIT margin of 11.2% in Q2 FY26 (PY: 11.2%).

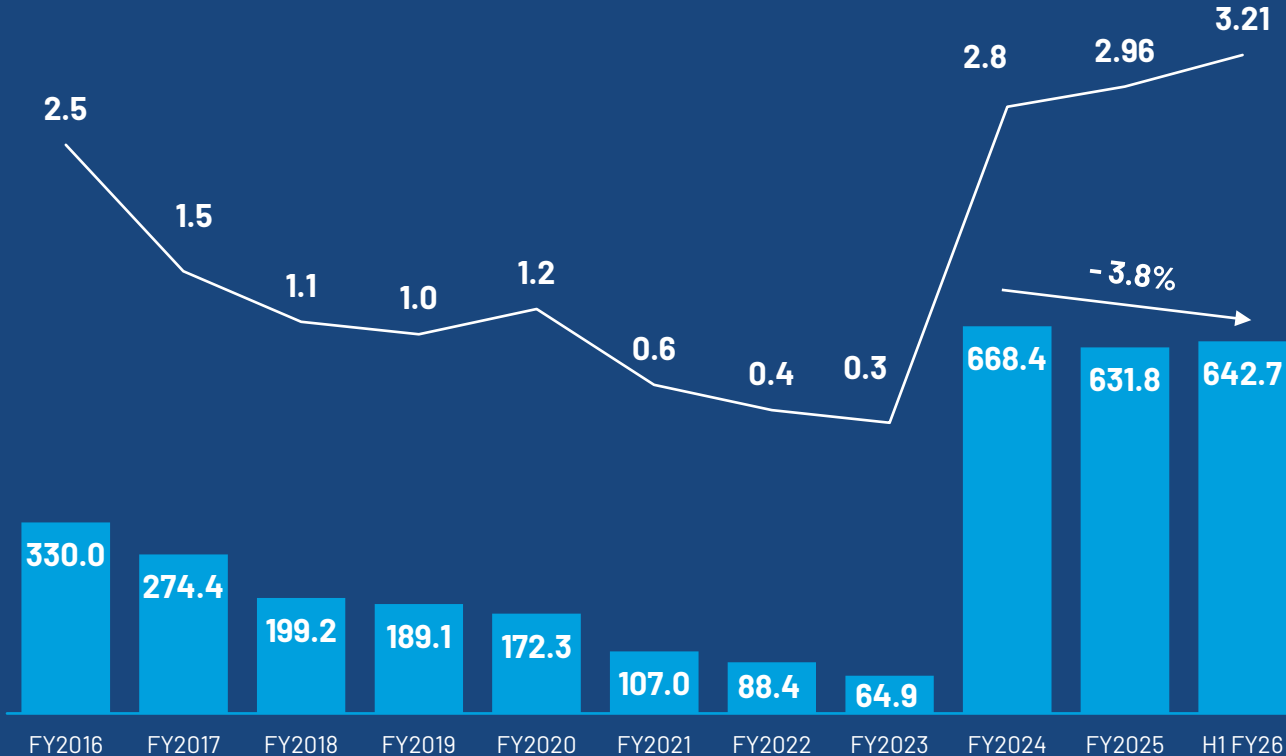
FREE CASH FLOW IMPACTED BY INCREASE IN NET WORKING CAPITAL

Q2 FY26 CASH FLOW OVERVIEW (€M)



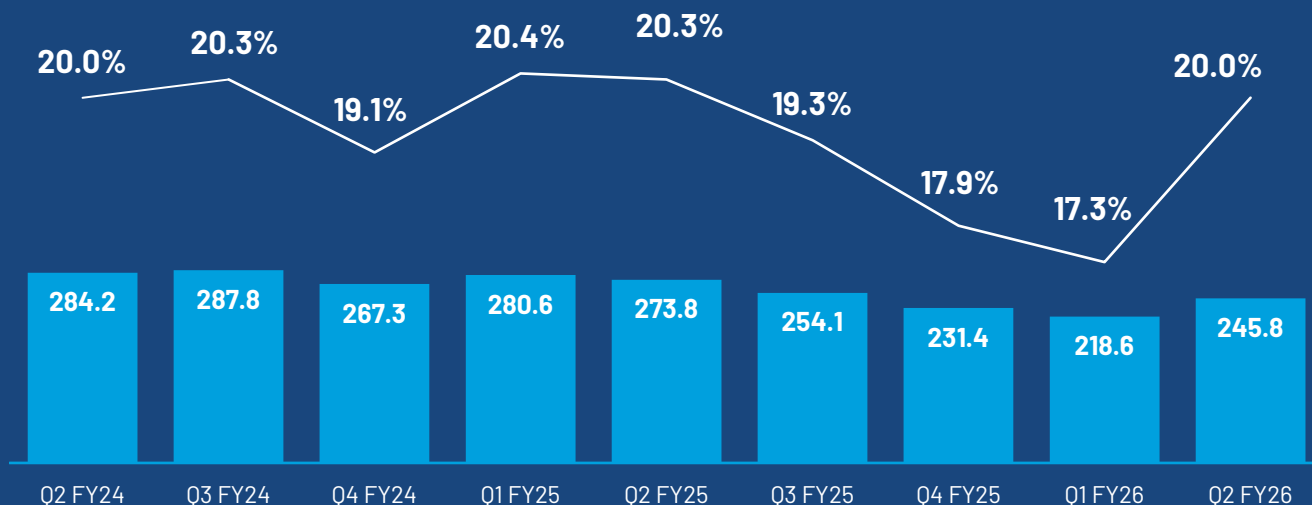
- › Change in Net Working Capital (NWC) is mainly due to the increase in trade accounts receivable in Q2 FY26 (€150.5m as of end Q1 FY26 vs. €178.2m as of end Q2 FY26).
- › Adjustments comprise payout of €0.6m for reorganization and €4.1m for transformation (personnel related measures) in Q2 FY26.

NET LEVERAGE RATIO AT 3.21 AS OF END MARCH 2026



- › Since end FY2024, net financial debt was reduced by €25.7m or 3.8%.
- › A slight setback in Q2 FY26: net financial debt increased to €642.7m and net leverage ratio to 3.21.
- › Our goal remains to reduce net leverage ratio below 2.0 within the next three years at the latest.

NWC/REVENUE RATIO INCREASED TO 20% IN Q2 FY2026



- › NWC/revenue ratio increased by 2.7pp q/q to 20.0% as of end Q2 FY26.
- › Net working capital (NWC) amounts to €245.8m as of end Q2 FY26, up €27.2m vs. previous quarter Q1 FY26, driven by increased trade accounts receivable (TAR) resulting from strong sales momentum in March 2026.
- › Receivables sold under the factoring program as of end March 2026: €27.2m (Sept 2025: €25.8m).

Item	Q1 FY26	Q2 FY26	Q/O Δ
Inventories	211.4	210.8	-0.6
TAR	150.5	178.2	+27.7
TAP	143.3	143.2	-0.1
NWC	218.6	245.8	+27.2

Strategy pillars

Key achievements

Focus / next milestones



Motion control innovations

- › Industrial Powerise solutions
- › Door actuations systems
- › Automated production lines for Powerise

- › Industrial automation and defense applications
- › Solutions for humanoid robots



Motion ecosystem

- › Stabilus4Automation
- › Employee engagement

- › Stronger use of AI
- › AI and data driven company



Sustainable profitable company

- › Solar power systems
- › Use of renewable energy
- › Margin recovery / protection

- › Stronger focus on growth
- › Margin improvement



Asian center of gravity

- › Local R&D
- › New plant in Suzhou

- › Further empowerment
- › Local decision making
- › Product localization, cost structure



Operational agility

- › Higher plant efficiency
- › Higher level of automation
- › Improved labor productivity

- › Deliver further cost savings and productivity improvements
- › Operational excellence



Utilization of provision for restructuring expenses in H1 FY2025: €5.5m

Cash outflow in H1 FY2026: €1.4m for reorganization and €5.0m for transformation

Cost savings in H1 FY2026: €14.3m

Expected savings in the next fiscal years:

c. €19m cost savings in FY2027

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

PROGRESS



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.



**The transformation program is proceeding as planned.
Personnel-related measures are largely completed.**



USE OF RENEWABLE ENERGY IN ELECTRICITY MIX

H1 FY25:
50%

H1 FY26:
52%

Up
20bp y/y



REDUCTION OF CO₂ EMISSIONS¹

H1 FY25:
-262 tons

H1 FY25:
-315 tons

Up
20% y/y



ELECTRICITY FROM OWN SOLAR POWER SYSTEMS

H1 FY25:
574 MWh

H1 FY26:
739 MWh

Up
29% y/y



SUSTAINABILITY RATINGS

CDP Climate score: **B** (scale: A to D-)

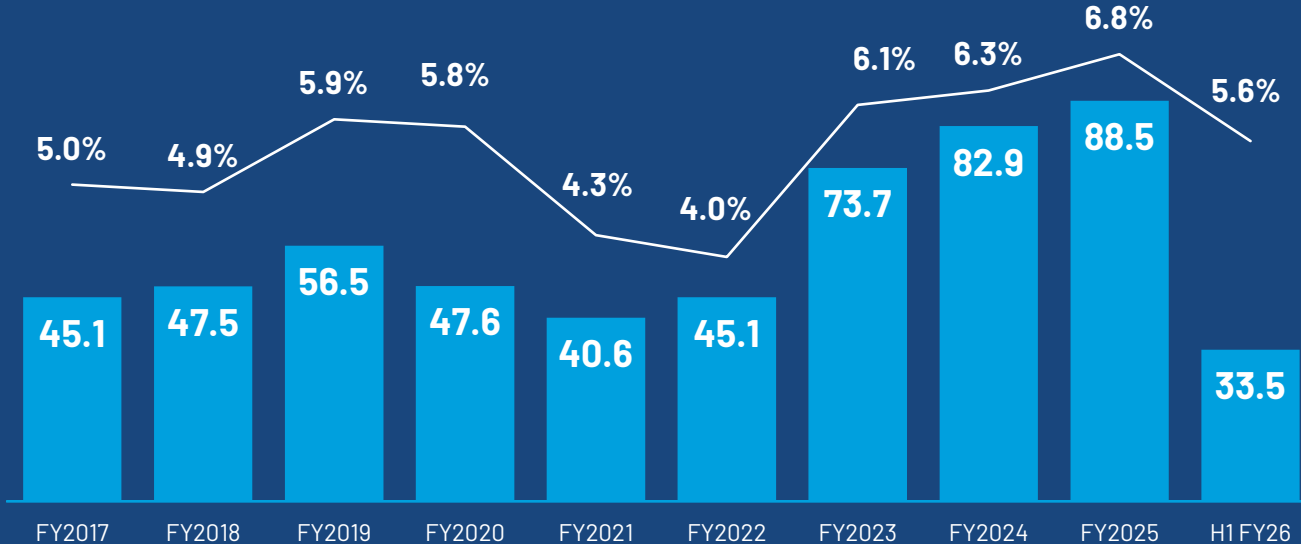
ISS ESG score: **C+ (Prime)** (scale: A+ to D-)

Sustainalytics "medium risk", **26.2** out of 100 points

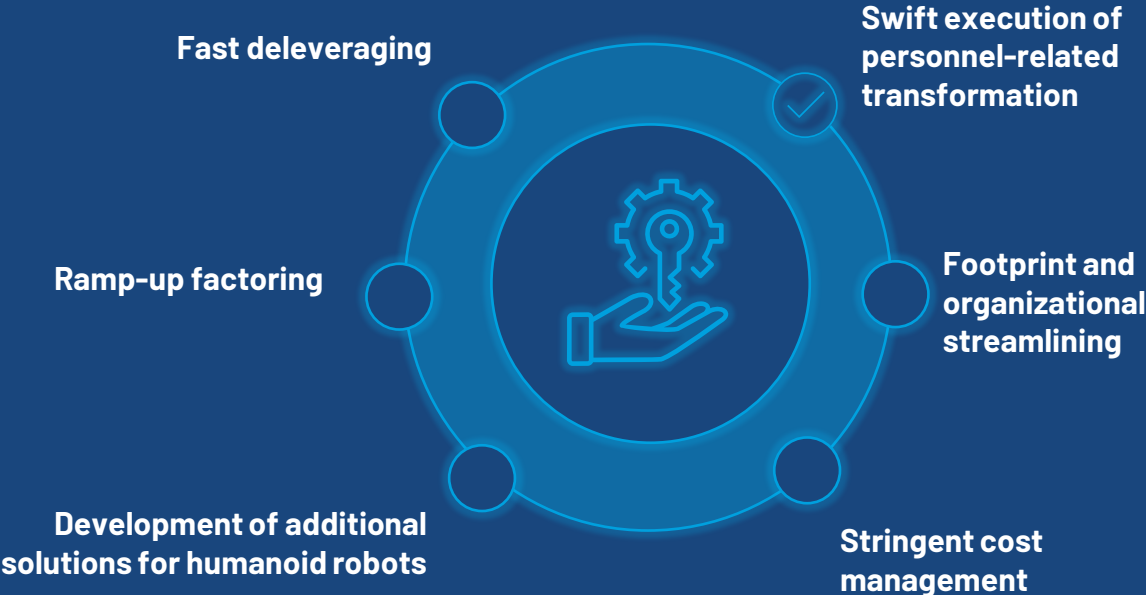
¹Reduction of CO₂ emissions by solar power systems (in metric tons).

INVESTMENT FOCUS ON INNOVATIVE NEW PRODUCTS

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- › Capex at 5.6% of group revenue in H1 FY26, below the FY2025 level of 6.8%.
- › A lower capex y/y will support faster deleveraging while keeping up the pace of innovation.
- › Important investment projects:
 - › radar technology,
 - › smart door actuation,
 - › electric grippers,
 - › automation of production facilities.





The H1 FY2026 revenue and earnings development was **significantly impacted by the current market environment**.

Stabilus' "local for local" approach and natural hedge foster resilience in current geopolitical situation.

Transformation program is on track; **first cost savings** in H1 FY26.

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.



Moderate global growth with a slightly improved outlook (IMF).

Uneven regional development, with softer growth in Europe and **stronger momentum in the US and China.**

Macroeconomic environment shaped by **geopolitical tensions, trade uncertainties and ongoing supply chain disruptions.**

Global light vehicle production (LVP) expected to remain **broadly flat at c. 92m units in FY2026**; slight improvement in industrial markets in H2 FY26.

	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.**
- › **We confirm our FY2026 guidance** from December 8, 2025.



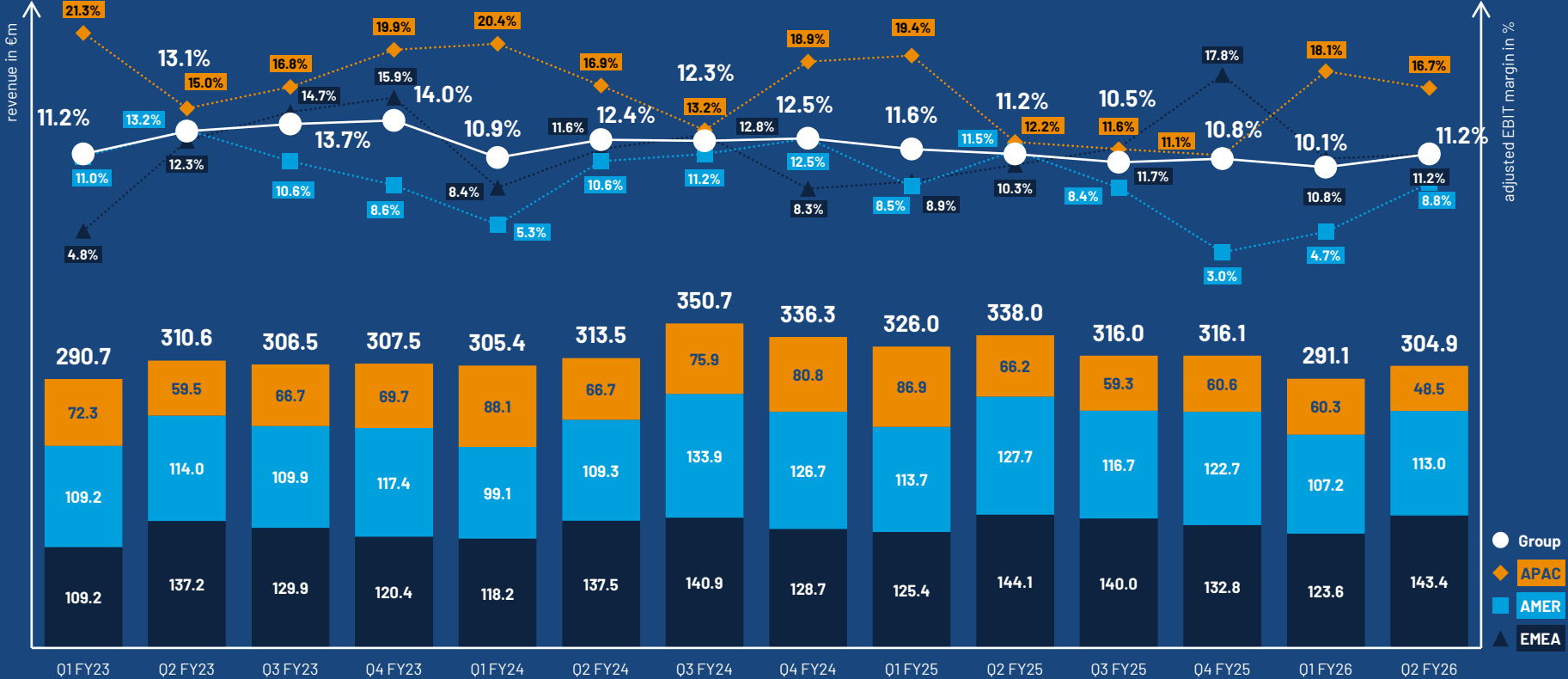
Q&A SESSION



APPENDIX

REVENUE AND ADJUSTED EBIT MARGIN BY QUARTER

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REVENUE

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THREE MONTHS ENDED MARCH 31, 2026

REVENUE (€M)

	Q2 FY2025 Actual	Q2 FY2026 Actual	Change	% change	Acquisition effect	Currency effect	Organic growth
Automotive Gas Spring	31.7	30.9	(0.8)	(2.5)%	0.0%	(0.1)%	(2.4)%
Automotive Powerise	27.9	27.5	(0.4)	(1.4)%	0.0%	(2.3)%	0.9%
Industrial Components	71.1	73.4	2.3	3.2%	0.0%	(1.1)%	4.3%
Industrial Automation (Destaco)	13.4	11.5	(1.9)	(14.2)%	0.0%	(0.2)%	(14.0)%
EMEA	144.1	143.3	(0.8)	(0.6)%	0.0%	(1.0)%	0.4%
Automotive Gas Spring	28.7	25.1	(3.6)	(12.5)%	0.0%	(4.0)%	(8.5)%
Automotive Powerise	38.5	31.2	(7.3)	(19.0)%	0.0%	3.4%	(22.4)%
Industrial Components	32.3	29.8	(2.5)	(7.7)%	0.0%	(9.6)%	1.9%
Industrial Automation (Destaco)	28.2	26.9	(1.3)	(4.6)%	0.0%	(10.6)%	6.0%
AMERICAS	127.7	113.0	(14.7)	(11.5)%	0.0%	(4.7)%	(6.8)%
Automotive Gas Spring	23.8	18.1	(5.7)	(23.9)%	0.0%	(5.3)%	(18.6)%
Automotive Powerise	31.3	20.9	(10.4)	(33.2)%	0.0%	(4.5)%	(28.7)%
Industrial Components	6.0	6.3	0.3	5.0%	0.0%	(6.2)%	11.2%
Industrial Automation (Destaco)	5.1	3.3	(1.8)	(35.3)%	0.0%	(6.0)%	(29.3)%
APAC	66.2	48.6	(17.6)	(26.6)%	0.0%	(5.1)%	(21.5)%
Total Automotive Gas Spring (AGS)	84.2	74.1	(10.1)	(12.0)%	0.0%	(2.9)%	(9.1)%
Total Automotive Powerise (APR)	97.7	79.6	(18.1)	(18.5)%	0.0%	(0.8)%	(17.7)%
Total Industrial Components (IC)	109.4	109.5	0.1	0.1%	0.0%	(3.9)%	4.0%
Total Industrial Automation (Destaco)	46.7	41.7	(5.0)	(10.7)%	0.0%	(7.1)%	(3.6)%
Total	338.0	304.9	(33.1)	(9.8)%	0.0%	(3.2)%	(6.6)%

REVENUE

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SIX MONTHS ENDED MARCH 31, 2026

REVENUE (€M)

	H1 FY2025 Actual	H1 FY2026 Actual	Change	% change	Acquisition effect	Currency effect	Organic growth
Automotive Gas Spring	60.7	58.0	(2.7)	(4.4)%	0.0%	(0.1)%	(4.3)%
Automotive Powerise	54.0	54.1	0.1	0.2%	0.0%	(2.3)%	2.5%
Industrial Components	128.4	132.3	3.9	3.0%	0.0%	(1.1)%	4.1%
Industrial Automation (Destaco)	26.3	22.5	(3.8)	(14.4)%	0.0%	(0.3)%	(14.1)%
EMEA	269.4	266.9	(2.5)	(0.9)%	0.0%	(1.1)%	0.2%
Automotive Gas Spring	54.2	49.5	(4.7)	(8.7)%	0.0%	(4.3)%	(4.4)%
Automotive Powerise	68.3	61.8	(6.5)	(9.5)%	0.0%	2.1%	(11.6)%
Industrial Components	64.5	57.2	(7.3)	(11.3)%	0.0%	(8.8)%	(2.5)%
Industrial Automation (Destaco)	54.4	51.7	(2.7)	(5.0)%	0.0%	(9.6)%	4.6%
AMERICAS	241.4	220.2	(21.2)	(8.8)%	0.0%	(4.9)%	(3.9)%
Automotive Gas Spring	53.6	40.2	(13.4)	(25.0)%	0.0%	(5.8)%	(19.2)%
Automotive Powerise	75.9	49.3	(26.6)	(35.0)%	0.0%	(4.9)%	(30.1)%
Industrial Components	12.6	12.3	(0.3)	(2.4)%	0.0%	(6.9)%	4.5%
Industrial Automation (Destaco)	11.0	7.1	(3.9)	(35.5)%	0.0%	(5.5)%	(30.0)%
APAC	153.1	108.9	(44.2)	(28.9)%	0.0%	(5.4)%	(23.5)%
Total Automotive Gas Spring (AGS)	168.5	147.7	(20.8)	(12.3)%	0.0%	(3.2)%	(9.1)%
Total Automotive Powerise (APR)	198.2	165.2	(33.0)	(16.6)%	0.0%	(1.8)%	(14.8)%
Total Industrial Components (IC)	205.5	201.8	(3.7)	(1.8)%	0.0%	(3.9)%	2.1%
Total Industrial Automation (Destaco)	91.7	81.3	(10.4)	(11.3)%	0.0%	(6.4)%	(4.9)%
Total	663.9	596.0	(67.9)	(10.2)%	0.0%	(3.5)%	(6.7)%

ADJUSTED EBIT

STABILUS

THREE AND SIX MONTHS ENDED MARCH 31, 2026

ADJUSTED EBIT (€M)

	Q2 FY2025 Actual	Q2 FY2026 Actual	Change	% change	Acquisition effect	Currency effect	Organic change
EMEA	14.9	16.1	1.2	8.1%	0.0%	(0.7)%	8.8%
AMERICAS	14.7	9.9	(4.8)	(32.7)%	0.0%	(5.4)%	(27.3)%
APAC	8.1	8.1	-	0.0%	0.0%	(6.2)%	6.2%
Total	37.7	34.1	(3.6)	(9.5)%	0.0%	(3.7)%	(5.8)%

	H1 FY2025 Actual	H1 FY2026 Actual	Change	% change	Acquisition effect	Currency effect	Organic change
EMEA	26.1	29.5	3.4	13.0%	0.0%	(1.1)%	14.1%
AMERICAS	24.4	14.9	(9.5)	(38.9)%	0.0%	(5.3)%	(33.6)%
APAC	25.0	19.1	(5.9)	(23.6)%	0.0%	(4.8)%	(18.8)%
Total	75.5	63.4	(12.1)	(16.0)%	0.0%	(3.7)%	(12.3)%

P&L AND ADJUSTED EBIT

THREE MONTHS ENDED MARCH 31, 2026

STABILUS

P&L (€M)

	Q2 FY2025 Actual	Q2 FY2026 Actual	Change	% change
Revenue	338.0	304.9	(33.1)	(9.8)%
Cost of sales	(244.3)	(220.9)	23.4	(9.6)%
Gross Profit	93.7	84.0	(9.7)	(10.4)%
<i>% margin</i>	27.7%	27.6%		
R&D expenses	(10.4)	(9.9)	0.5	(4.8)%
Selling expenses	(35.3)	(32.9)	2.4	(6.8)%
Administrative expenses	(21.7)	(17.0)	4.7	(21.7)%
Other income/expenses	(0.5)	0.4	0.9	<(100.0)%
EBIT	25.9	24.6	(1.3)	(5.0)%
<i>% margin</i>	7.7%	8.1%		
Finance income/costs	(10.6)	(10.7)	(0.1)	0.9%
EBT	15.3	13.8	(1.5)	(9.8)%
<i>% margin</i>	4.5%	4.5%		
Income tax	(4.1)	(4.5)	(0.4)	9.8%
Profit	11.2	9.3	(1.9)	(17.0)%
<i>% margin</i>	3.3%	3.1%		
EPS in €	0.44	0.37	(0.07)	(15.9)%

ADJUSTED EBIT (€M)

	Q2 FY2025 Actual	Q2 FY2026 Actual	Change	% change
EBIT	25.9	24.6	(1.3)	(5.0)%
PPA adj. - D&A	9.2	7.6	(1.6)	(16.8)%
Reorganization	2.3	1.5	(0.8)	(32.0)%
Advisory costs	0.4	0.4	-	0.0%
Total adjustments	11.8	9.5	(2.3)	(19.5)%
Adjusted EBIT	37.7	34.1	(3.6)	(9.5)%
<i>% margin</i>	11.2%	11.2%		

P&L AND ADJUSTED EBIT

SIX MONTHS ENDED MARCH 31, 2026

STABILUS

P&L (€M)

	H1 FY2025 Actual	H1 FY2026 Actual	Change	% change
Revenue	663.9	596.0	(67.9)	(10.2)%
Cost of sales	(483.0)	(436.3)	46.7	(9.7)%
Gross Profit	180.9	159.7	(21.2)	(11.7)%
% margin	27.2%	26.8%		
R&D expenses	(19.8)	(17.6)	2.2	(11.1)%
Selling expenses	(68.7)	(65.3)	3.4	(4.9)%
Administrative expenses	(42.6)	(33.9)	8.7	(20.4)%
Other income/expenses	4.2	2.8	(1.4)	(33.3)%
EBIT	54.0	45.7	(8.3)	(15.4)%
% margin	8.1%	7.7%		
Finance income/costs	(17.8)	(20.2)	(2.4)	13.5%
EBT	36.2	25.5	(10.7)	(29.6)%
% margin	5.5%	4.3%		
Income tax	(10.7)	(8.0)	2.7	(25.2)%
Profit	25.5	17.4	(8.1)	(31.8)%
% margin	3.8%	2.9%		
EPS in €	1.00	0.68	(0.32)	(32.0)%

ADJUSTED EBIT (€M)

	H1 FY2025 Actual	H1 FY2026 Actual	Change	% change
EBIT	54.0	45.7	(8.3)	(15.4)%
PPA adj. - D&A	18.1	15.2	(2.9)	(15.3)%
Reorganization	2.3	2.1	(0.2)	(6.9)%
Advisory costs	1.2	0.4	(0.8)	(68.7)%
Total adjustments	21.5	17.7	(3.8)	(17.7)%
Adjusted EBIT	75.5	63.4	(12.1)	(16.0)%
% margin	11.4%	10.6%		

BALANCE SHEET

STABILUS

MARCH 31, 2026

BALANCE SHEET (€M)

	Sept 2025 Actual	March 2026 Actual	Change	% change
Property, plant and equipm.	306.6	308.6	2.0	0.7%
Goodwill	546.9	532.5	(14.4)	(2.6)%
Other intangible assets	476.8	444.8	(32.0)	(6.7)%
Other investments	6.0	6.0	-	0.0%
Inventories	215.5	210.8	(4.7)	(2.2)%
Trade receivables	206.4	178.2	(28.2)	(13.7)%
Other assets	56.9	61.1	4.2	7.4%
Cash	95.1	142.5	47.4	49.8%
Total assets	1,910.2	1,884.5	(25.7)	(1.3)%
Equity incl. minorities	689.2	663.9	(25.3)	(3.7)%
Debt (incl. accrued interest)	791.4	785.2	(6.2)	(0.8)%
Pension plans	46.9	43.5	(3.4)	(7.2)%
Deferred tax liabilities	62.4	61.2	(1.2)	(1.9)%
Trade payables	148.1	143.2	(4.9)	(3.3)%
Other liabilities	172.2	187.5	15.3	8.9%
Total equity and liabilities	1,910.2	1,884.5	(25.7)	(1.3)%

THREE MONTHS ENDED MARCH 31, 2026

CASH FLOW STATEMENT (€M)

	Q2 FY2025 Actual	Q2 FY2026 Actual	Change	% change
Cash flow from operating activities	38.7	15.7	(23.0)	(59.4)%
Cash flow from investing activities	(22.6)	(16.3)	6.3	(27.9)%
Cash flow from financing activities	(16.0)	(26.0)	(10.0)	62.5%
Net increase / (decrease) in cash	0.1	(26.6)	(26.7)	<(100.0)%
Effect of movements in exchange rates	(2.4)	2.8	5.2	<(100.0)%
Cash as of beginning of the period	97.5	166.4	68.9	70.7%
Cash as of end of the period	95.1	142.5	47.4	49.8%

ADJ. FCF (€M)

	Q2 FY2025 Actual	Q2 FY2026 Actual	Change	% change
Cash flow from operating activities	38.7	15.7	(23.0)	(59.4)%
Cash flow from investing activities	(22.6)	(16.3)	6.3	(27.9)%
Free cash flow	16.1	(0.6)	(16.7)	<(100.0)%
Adjustments	2.0	4.7	2.7	>100.0%
Adj. FCF	18.1	4.1	(14.0)	(77.3)%

CASH FLOW

SIX MONTHS ENDED MARCH 31, 2026

CASH FLOW STATEMENT (€M)

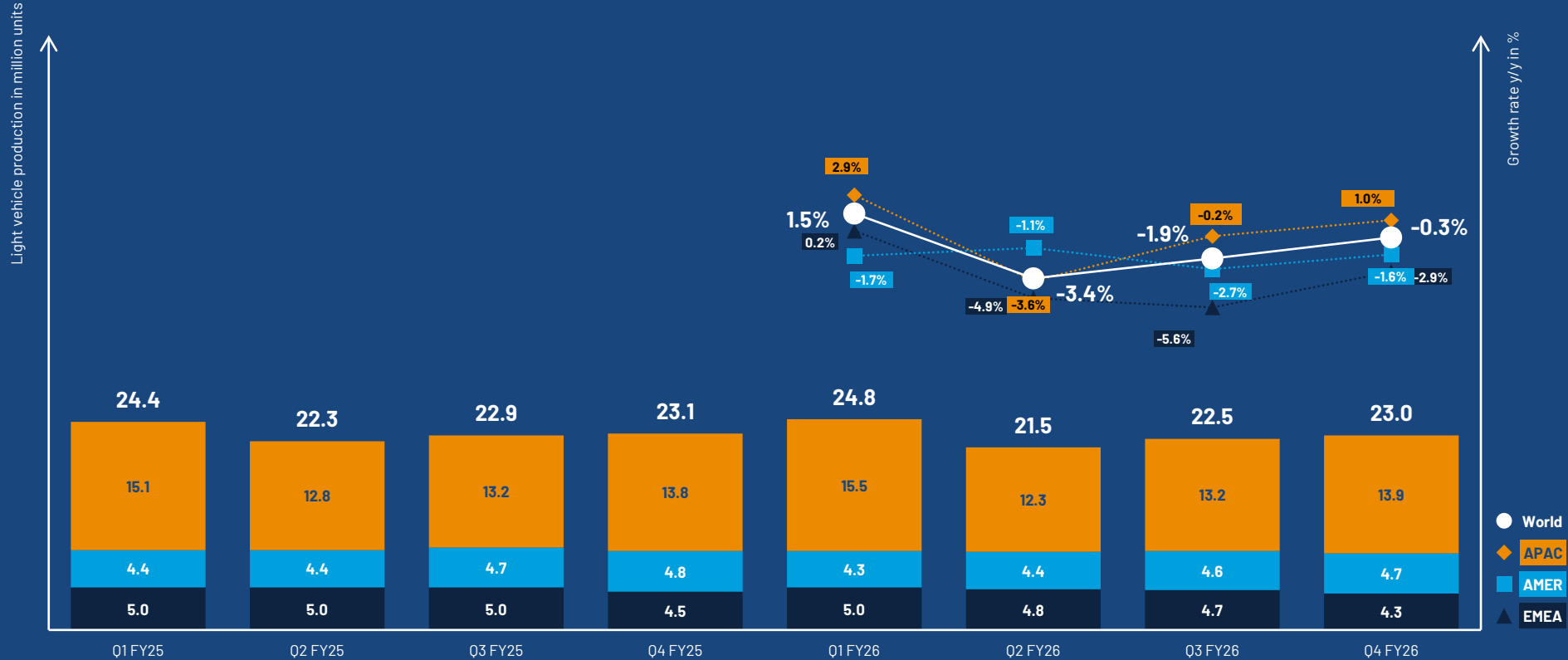
	H1 FY2025 Actual	H1 FY2026 Actual	Change	% change
Cash flow from operating activities	68.4	53.3	(15.1)	(22.1)%
Cash flow from investing activities	(45.4)	(31.8)	13.6	(30.0)%
Cash flow from financing activities	(37.4)	(45.4)	(8.0)	21.4%
Net increase / (decrease) in cash	(14.4)	(23.8)	(9.4)	65.3%
Effect of movements in exchange rates	0.1	3.8	3.7	>100.0%
Cash as of beginning of the period	109.4	162.6	53.2	48.6%
Cash as of end of the period	95.1	142.5	47.4	49.8%

ADJ. FCF (€M)

	H1 FY2025 Actual	H1 FY2026 Actual	Change	% change
Cash flow from operating activities	68.4	53.3	(15.1)	(22.1)%
Cash flow from investing activities	(45.4)	(31.8)	13.6	(30.0)%
Free cash flow	23.0	21.5	(1.5)	(6.5)%
Adjustments	4.0	6.5	2.5	62.5%
Adj. FCF	27.0	28.0	1.0	3.7%

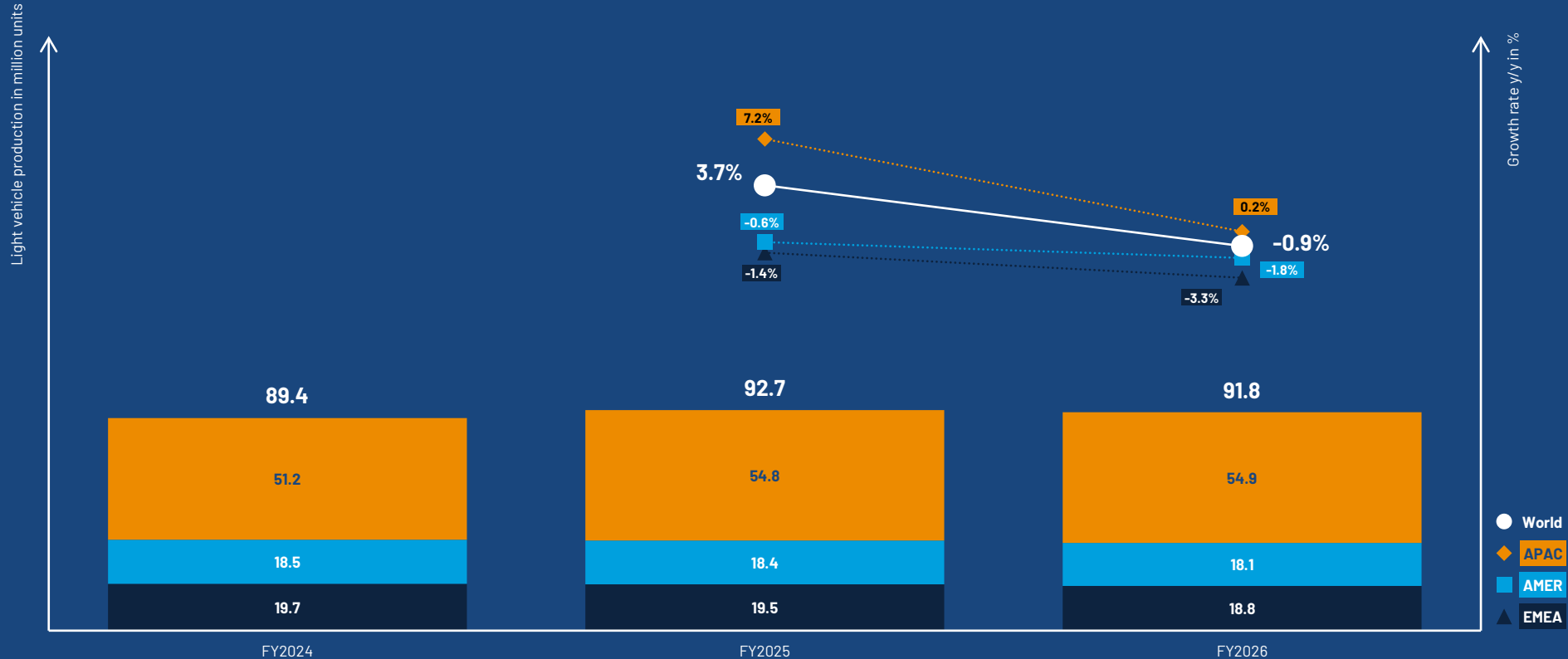
LVP DEVELOPMENT / FORECAST

QUARTERLY VIEW: Q1 FY25 – Q4 FY26



LVP DEVELOPMENT / FORECAST

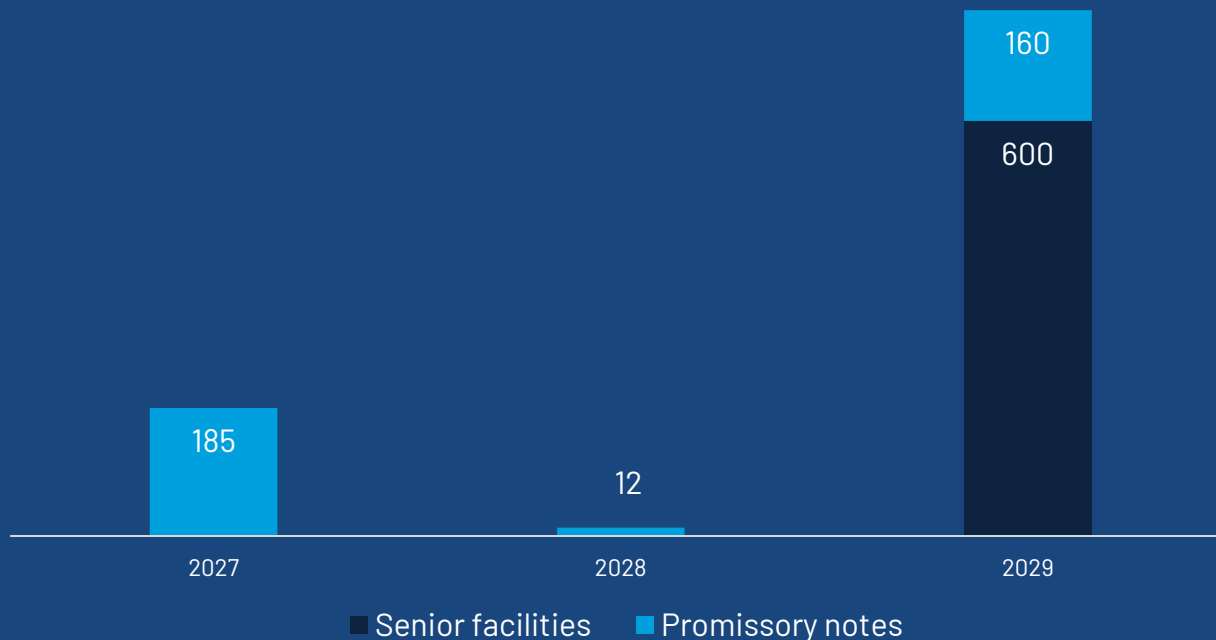
YEARLY VIEW: FY2024 – FY2026



FINANCIAL DEBT

MATURITY PROFILE AND UTILIZATION OF CREDIT LINES

MATURITY PROFILE (€M)



- › Senior facilities (due June 2029):
 - › €100m term loan facility
 - › €350m revolving credit facility
 - › €150m credit facility.
- › Utilization as of end March 2026 (drawn credit lines):
 - › €100 term loan facility
 - › €168m revolving credit facility
 - › €150m credit facility.

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



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