

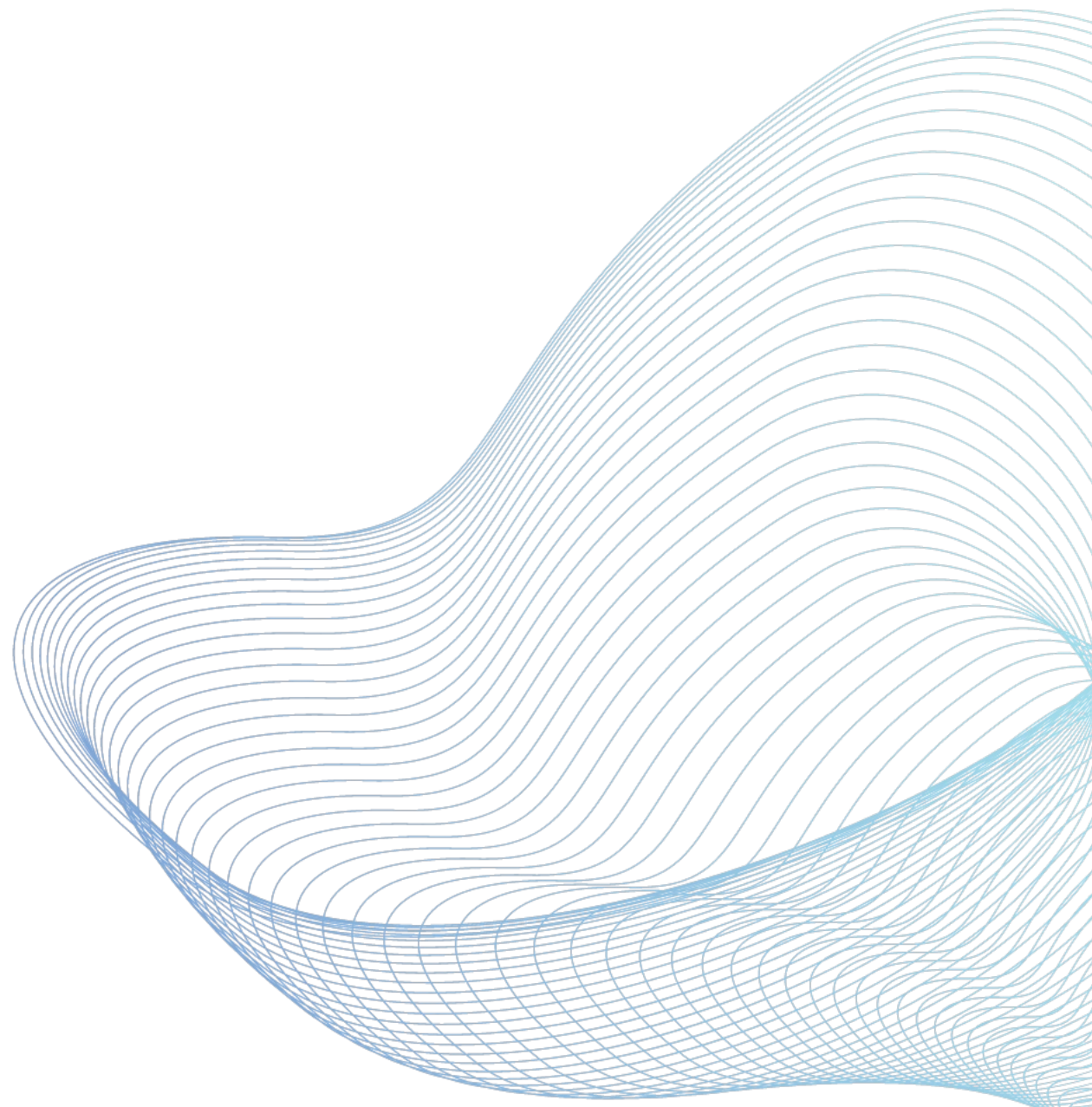


# **AUCyber Limited**

## **HY26 Half Year Results**

*Structural Reset Delivered.  
– Platform Positioned for Disciplined Growth.*

27 February 2026



# Contents



|    |                     |    |
|----|---------------------|----|
| 01 | ○ Business Overview | 3  |
| 02 | ○ Financial Summary | 5  |
| 03 | ○ Strategic Focus   | 11 |
| 04 | ○ Appendix          | 15 |





# Business Overview



# HY26 Key Highlights



**Gross Revenue**  
**\$10.4m**

HY25: \$15.7m

**EBITDA Loss**  
**\$0.06m**

HY25: Loss \$1.74m

**Loss Before Tax:**  
**\$2.4m**

HY25: Loss \$19.5m

**Cash Position**  
**\$2.42m**



**Move to Kaseya  
Saas Platform  
completed**



**Sovereign Cloud  
& 24x7 SOC  
Operational**



**Migration to  
Hubspot CRM  
completed**



**5GN Enterprise  
rebranded to  
AUCyber  
completed**





# Financial Summary



# HY26 Statutory EBITDA Reconciliation



|                                 | Dec-25        | Dec-24         | Change       |
|---------------------------------|---------------|----------------|--------------|
|                                 | \$m           | \$m            | \$m          |
| Revenue (Gross)                 | 10.41         | 15.75          | (5.34)       |
| COGS                            | (1.16)        | (3.34)         | 2.24         |
| Employee                        | (5.59)        | (9.74)         | 4.15         |
| Licencing Fees                  | (2.84)        | (2.63)         | (0.21)       |
| Other                           | (0.89)        | (1.72)         | 0.84         |
| <b>EBITDA</b>                   | <b>(0.06)</b> | <b>(1.74)</b>  | <b>1.68</b>  |
| Finance                         | (0.07)        | 0.05           | 0.12         |
| Depreciation & Amortisation     | (2.28)        | (3.65)         | 1.37         |
| Share Based Payments            | (0.01)        | (0.33)         | 0.32         |
| Impairment                      | -             | (14.75)        | 14.75        |
| Gain on Deferred Consideration  | -             | 0.95           | (0.95)       |
| <b>Profit Before Income tax</b> | <b>(2.42)</b> | <b>(19.47)</b> | <b>17.05</b> |

# HY26 Balance Sheet



|                          | Dec-25        | Jun-25        | Change        |
|--------------------------|---------------|---------------|---------------|
|                          | \$m           | \$m           | \$m           |
| Cash and Receivables     | 5.50          | 7.92          | (2.42)        |
| Other Assets             | 6.58          | 8.87          | (2.29)        |
| <b>Total Assets</b>      | <b>12.08</b>  | <b>16.79</b>  | <b>(4.71)</b> |
| Payables                 | (2.92)        | (3.45)        | 0.53          |
| Leases                   | (1.66)        | (1.86)        | 0.20          |
| Leases – Non Current     | (2.04)        | (2.87)        | 0.83          |
| Provisions               | –             | (0.74)        | 0.74          |
| <b>Total Liabilities</b> | <b>(6.62)</b> | <b>(8.92)</b> | <b>2.30</b>   |
| <b>Net Assets</b>        | <b>5.46</b>   | <b>7.88</b>   | <b>(2.42)</b> |

## **88% reduction in statutory loss year-on-year**

---

- EBITDA effectively breakeven following structural reset
- Cost base materially reduced
- No material non-recurring charges in HY26



## **Employee Benefits: \$5.6m (down from \$10.1m)**

---

- Depreciation & Amortisation: \$2.3m (down from \$3.7m)
- Lean operating model embedded
- Improved operating leverage potential





# Balance Sheet Position

## Cash balance per HY26 – \$2m

- No borrowings outstanding
- Improved working capital discipline
- Platform stable and capital structure flexible



# Strategic Focus

# Growth Re-Emergence Strategy

## Organic: Margin expansion & Cross-sell



**Automation within SOC & Cloud platform**



**Selective acquisition of MSP & Cyber businesses**



**Disciplined, margin-accretive focus**





# Target Acquisition Profile

**\$5m–\$35m  
revenue  
range**



**Recurring revenue contracts**



**Government / regulated exposure**



**EBITDA positive or pathway to profitability**



**Integration into existing Cloud & SOC platform**

## Sustain EBITDA improvement



**Maintain liquidity discipline**



**Pursue selective acquisition opportunities**



**Position for disciplined expansion phase**





# Appendix



# Glossary

| Term               | Definition                                                                                                                                                                                                                                                                             |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| AASB               | Australian Accounting Standards Board                                                                                                                                                                                                                                                  |
| ACSC               | Australian Cyber Security Centre                                                                                                                                                                                                                                                       |
| ARPU               | Average Revenue Per User (ARPU) per annum is calculated by dividing ARR by the number of customers                                                                                                                                                                                     |
| ARR                | Annual Recurring Revenue (ARR) is calculated as the average monthly revenue of the preceding rolling 3 months, multiplied by 4. ARR excludes one-off professional services or project-based revenue.                                                                                   |
| ASX                | Australian Securities Exchange                                                                                                                                                                                                                                                         |
| AUCyber            | Combined entity including AUCyber, Venn IT, PCG Cyber and the Arado business                                                                                                                                                                                                           |
| CAPEX              | Capital Expenditure                                                                                                                                                                                                                                                                    |
| EBITDA             | Earnings Before Interest, Tax, Depreciation and Amortisation                                                                                                                                                                                                                           |
| IaaS / SaaS / PaaS | Infrastructure as a Service / Software as a Service / Platform as a Service                                                                                                                                                                                                            |
| IaaS Consumption   | The revenue recognised based on the aggregated consumption of the IaaS services, excluding implementation, consulting and setup charges or one off non-recurring charges. In the Company's experience it is reasonable to expect IaaS consumption to be repeated in subsequent periods |
| MDR / EDR / XDR    | Managed Detection & Response / Endpoint Detection & Response / Extended Detection & Response                                                                                                                                                                                           |
| MSP                | Managed Service Provider                                                                                                                                                                                                                                                               |
| MSSP               | Managed Security Service Provider                                                                                                                                                                                                                                                      |
| CYB                | AUCyber Limited ACN 80 622 728 189 (ASX:CYB)                                                                                                                                                                                                                                           |
| TCV                | Total Contract Value                                                                                                                                                                                                                                                                   |

# Important Disclaimer



## Disclaimer

This presentation has been prepared by AUCyber Limited ACN 80 622 728 189 and makes statements about it as well as its subsidiaries (together (CYB or the **Company**)). To the maximum extent permitted by law, no member of Company, or any of its officers, employees, agents or any other party: i) accepts any liability for any loss arising from or in connection with this presentation or the information contained within it, including, without limitation, any liability arising from the fault or negligence relating to its content; ii) makes any representation or warranty and take no responsibility for any part of the presentation or the information contained within it; or iii) makes any representation or warranty, express or implied, as to the accuracy, reliability, completeness or currency of the information contained within it and it does not take into account any individuals investment or financial circumstances.

It is not intended to influence any person into dealing with a financial product or provide financial advice and does not constitute an offer to purchase or subscribe for any shares or securities in Company. Any person contemplating such purchase or subscription is recommended to obtain professional advice.

This presentation contains certain forward-looking statements. Words such as 'continue', 'expect', 'forecast', 'estimated', 'potential', 'likely', 'projected', 'anticipated' or such similar phrases are intended to identify forward looking statements. Similarly, indications of and future guidance on future earning, liquidity and financial position, capex requirements, performance, business performance, project timelines or spend, facility go-live dates, utilisation, initial or total facility capacity or connection rates and projections of these are also forward-looking statements as are statements regarding any internal management estimates and assessments of sales, market competition, service demand and market outlook.

Such forward looking statements are not guarantees of future performance and involve known and unknown risks, uncertainties and other factors, many of which are beyond the control of the Company, its officers, employees, agents and advisors and which may cause actual results and outcomes to differ materially from those expressed or implied in this presentation or in such statements. There can be no assurance that the actual outcomes discussed in this presentation will not differ materially from these statements. There are usually differences between forecasts and actual results because events and circumstances frequently do not occur as forecast, and these differences may be material at times.

Investors should not place undue reliance on such forward-looking statements, especially in view of the current and challenging economic, global climate and supply chain issues and other uncertainty and disruption. Neither Company, any member of the Company Group or their officers, employees, agents or any other person gives any warranty, representation or assurance that the occurrence of the events expressed or implied in any forward looking statement will occur or have or accept any responsibility to update or revise any such forward-looking statement to reflect any change in Company Group's circumstances or financial condition, status or affairs or any change in the events or conditions on which such statements are based, except as required under Australian law.

## Past Performance

Past performance detailed in this presentation is given for illustrative purposes only and should not be relied upon as an indication of the Company's views on its future financial performance or condition. Readers should note that past performance of the Company cannot be relied upon as an indicator of (and provides no guidance as to) future performance, including the future trading price of the Shares, or the reasonableness of any forward looking statements, forecast financial information or other forecast. Actual results could differ materially from those referred to in the presentation.

## Financial data

Investors should be aware that certain financial measures included in this presentation are 'non-IFRS financial information' under ASIC Regulatory Guide 230: 'Disclosing non-IFRS financial information' published by ASIC and are not recognised under International Financial Reporting Standards (**IFRS**). The principal non-IFRS financial measures that are referred to in this presentation is EBITDA and underlying EBITDA. EBITDA is earnings before interest, tax, depreciation and amortisation and significant items. Management uses EBITDA to evaluate the operating performance of the business prior to the impact of significant items, the non-cash impact of depreciation and amortisation and interest and tax charges. The Company believes the non-IFRS financial information provides useful information to users in measuring the financial performance and conditions of AUCyber).

The non-IFRS financial information does not have a standardised meaning prescribed by IFRS. Therefore, the non-IFRS financial information is not a measure of financial performance, liquidity or value under the IFRS and may not be comparable to similarly titled measures presented by other entities, and should not be construed as an alternative to other financial measures determined in accordance with IFRS. Investors are cautioned, therefore, not to place undue reliance on any non-IFRS financial information included in this presentation.

## Basis of Preparation

This presentation incorporates results on a statutory as well and non-statutory basis with financial results presented in AUD unless otherwise stated. Data used for calculating percentage movements have been based on whole actual numbers and estimates where appropriate. Please also see supplementary notes, footnotes, links and additional terms throughout the presentation.



## **CONTACT DETAILS**

**Joseph Demase**  
Chairman  
[jd@aucyber.com.au](mailto:jd@aucyber.com.au)