



FINANCIAL REPORT

1 April – 30 September 2026

21 October 2026

Magnus Söderlind – CEO
Peter Schön – CFO



HIGHLIGHTS

Second Quarter 2026/2027

Market conditions cautious

- ❖ Increasing costs (raw material, energy, freight, CBAM) compensated by price increases
- ❖ The market within construction and industry slowly recover
 - ❖ Slow summer, pick up in September

Continued Earnings, Margin, Return and EPS Improvement

- ❖ Turnover MSEK 1,222 (8% growth)
- ❖ Adjusted EBITA +9%. 27 consecutive quarters with improved profit
- ❖ Adjusted EBITA margin 11.9% (11.8)
- ❖ Return (P/WC) increased 2 percentage unit to 38%
- ❖ EPS R12 (adjusted) improved to SEK 8.85 (8.30) after dilution



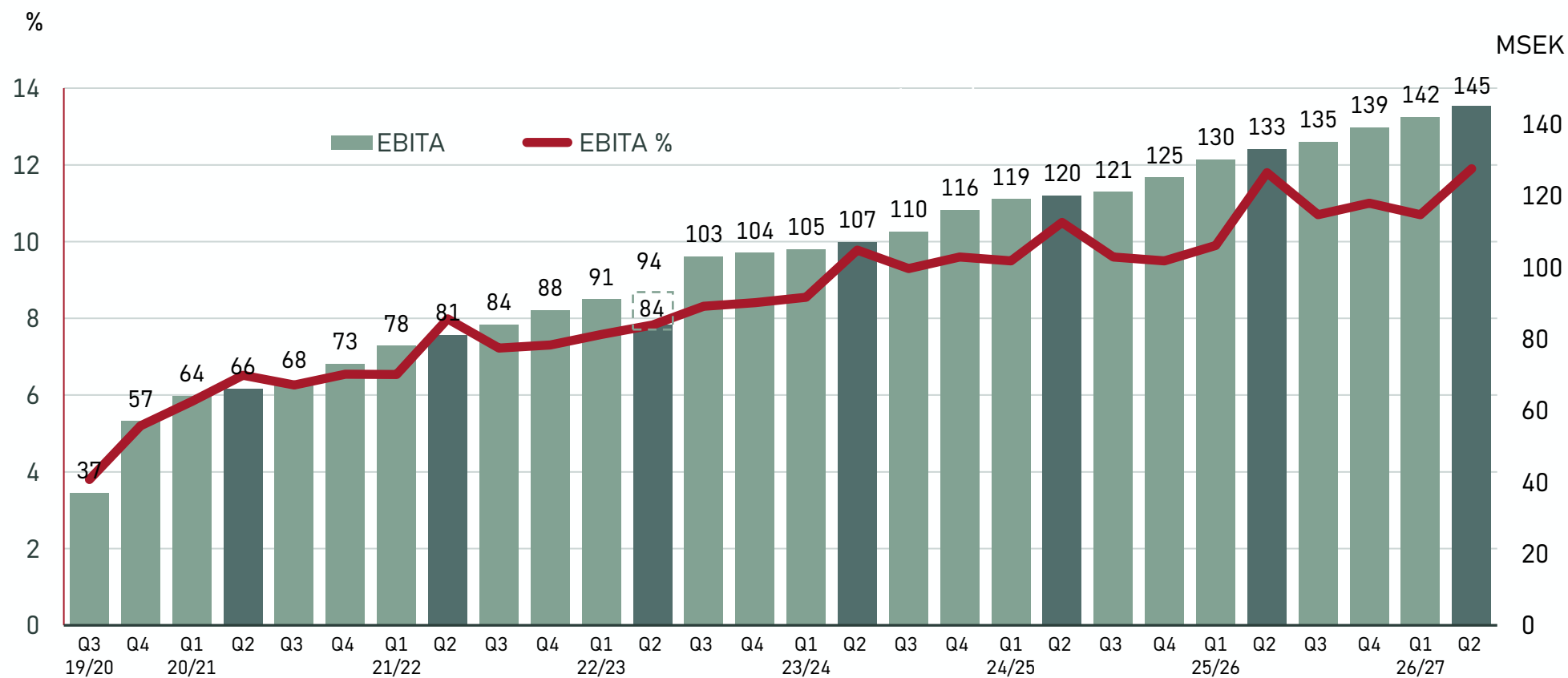
ONE ADD-ON ACQUISITION IN Q2 2026/2027

		Division	Annual Revenue MSEK	EBITA %	P/WC %
Q3		Modus Gauges	25	>>>15	>45
		DataLase	50	>>15	>>45
Q4		A1S	110	>>>15	>>>45
Q1		All Coating Industrilackering*	25	>>>15	>>>45
Q2		Håva-Skyltar**	17	>>>15	>>>45
Total			227		

* Add-on acquisition current platform Uveco

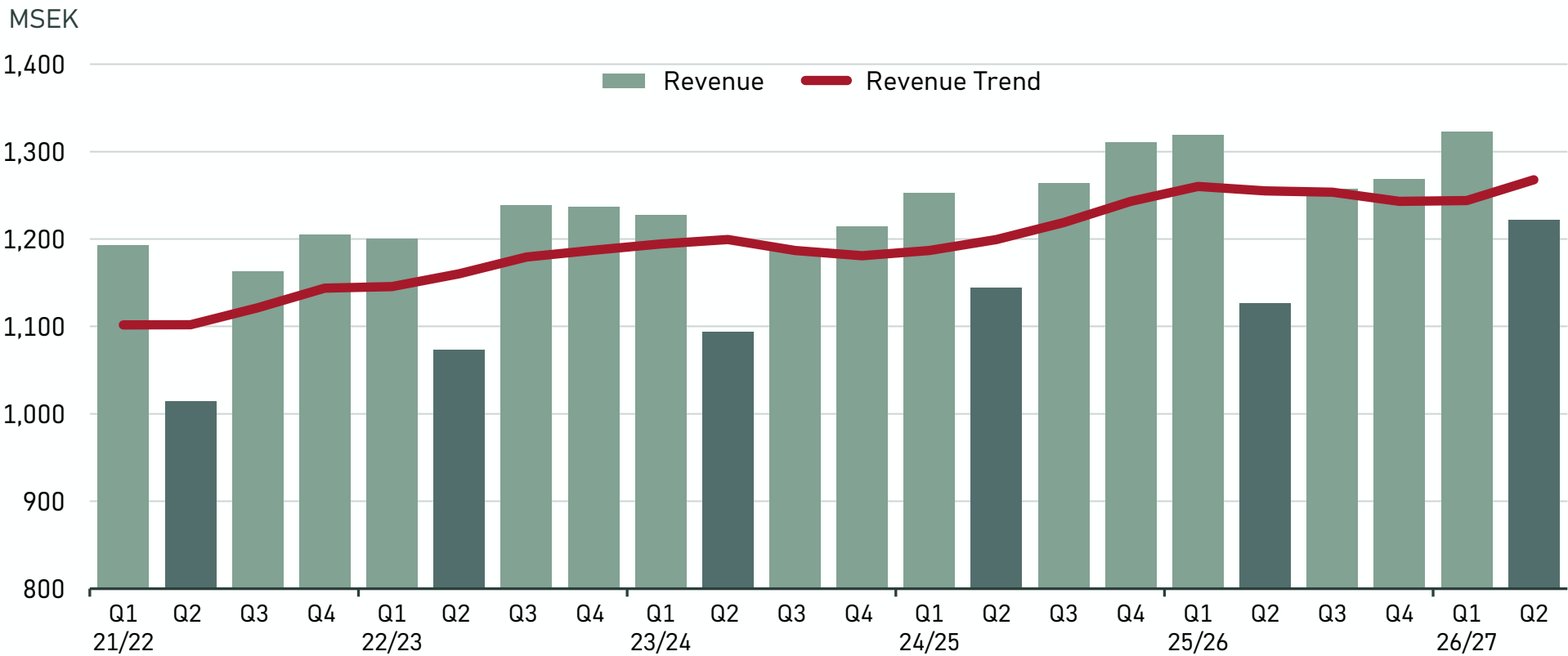
** Add-on acquisition current platform Collinder

27 CONSECUTIVE QUARTERS WITH INCREASED EBITA

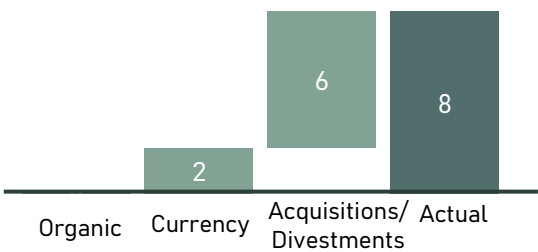


NET SALES - ORGANIC GROWTH IN ALL DIVISIONS EXCEPT PPE & UTILITIES

Revenue per quarter

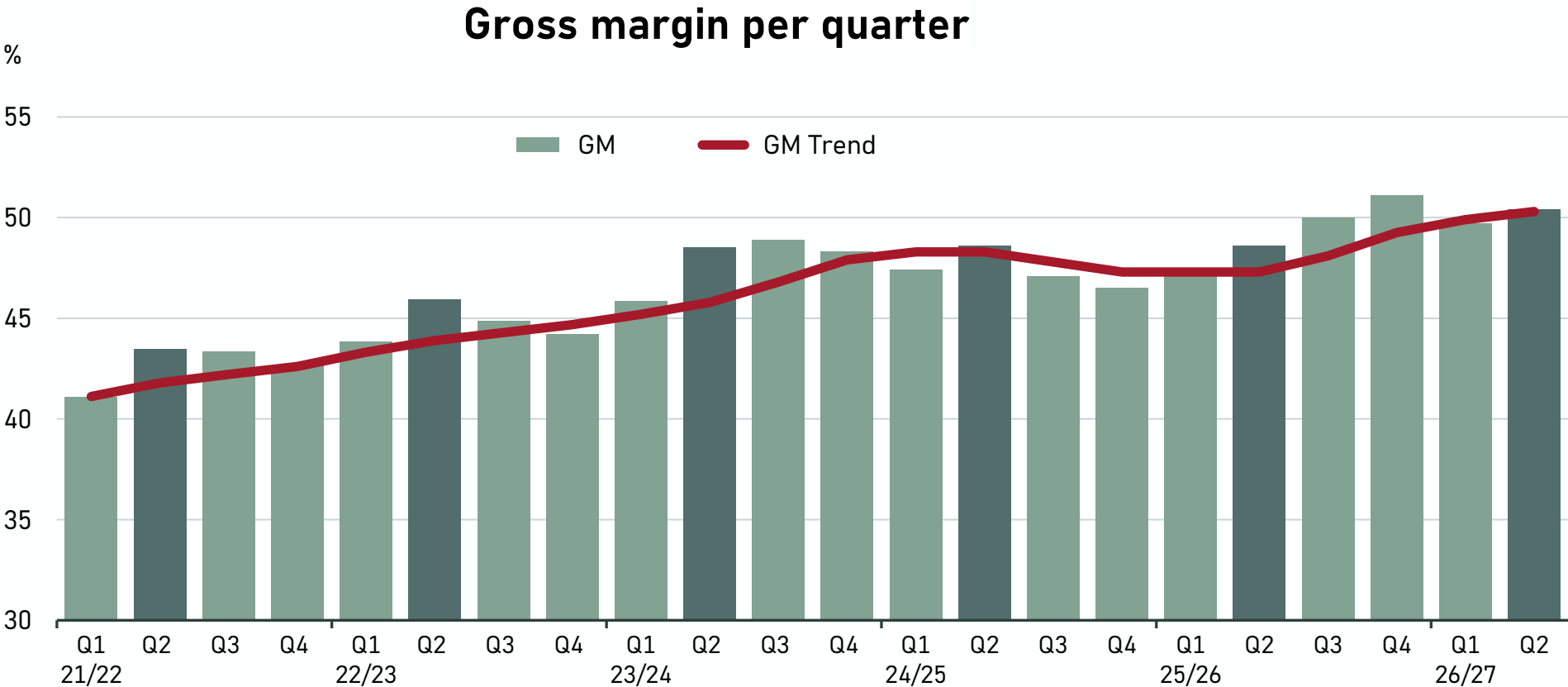


Quarterly Revenue, %

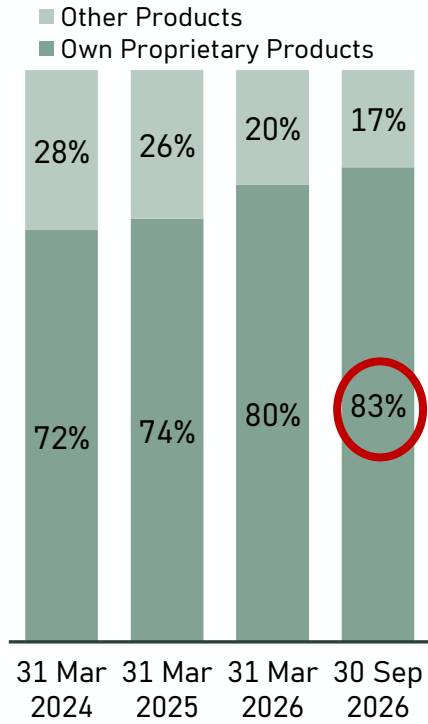


GROSS MARGIN REMAIN ON A GOOD LEVEL

DIVESTMENTS, ORGANIC IMPROVEMENTS AND MIX

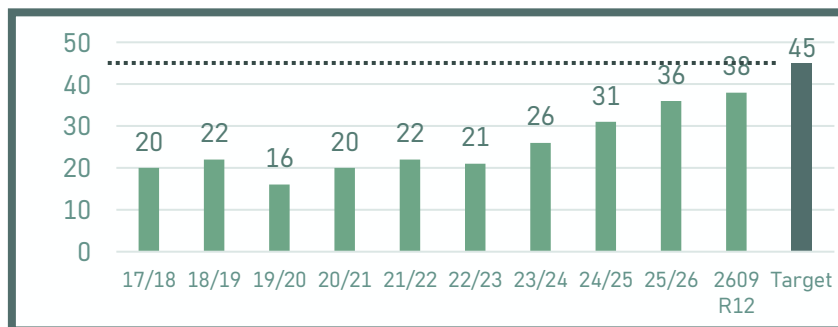


Revenue per type of products
Rolling 12 months



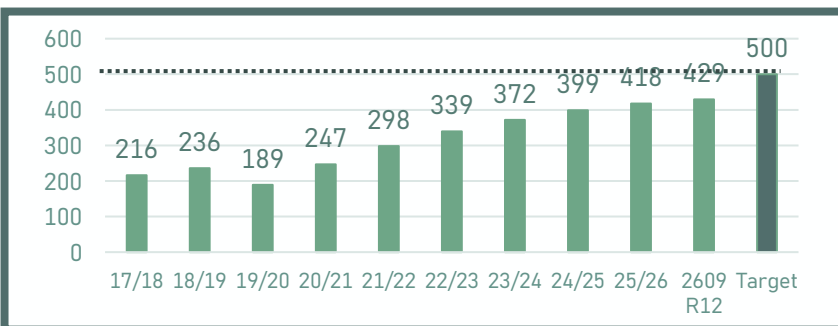
IMPROVEMENT CONTIUNES IN ALL THREE TARGET AREAS

P/WC



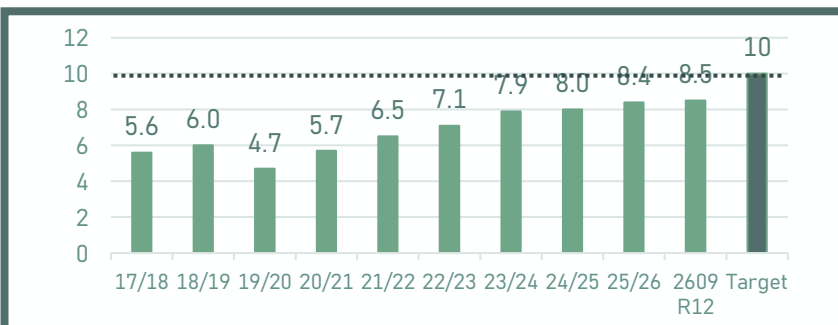
45%

EBIT



500 MSEK

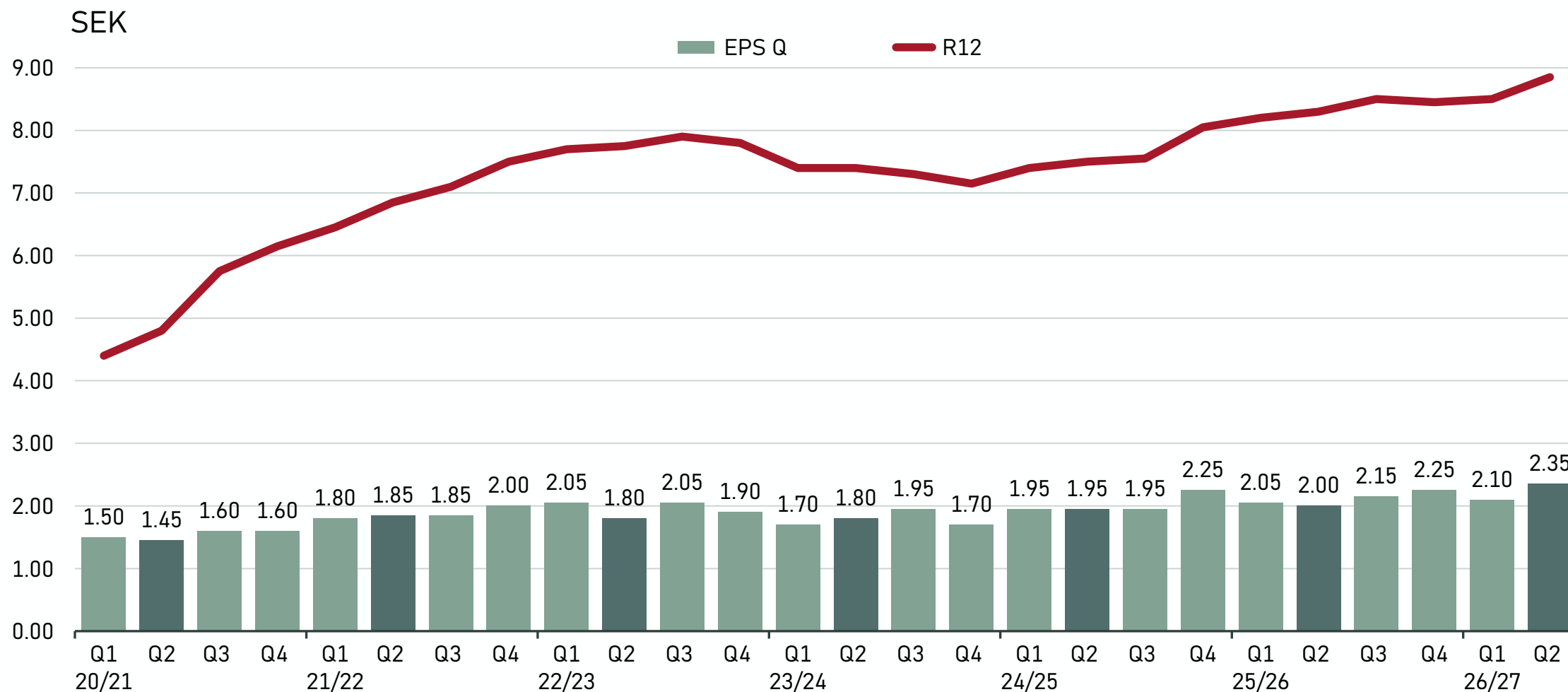
EBIT-
margin



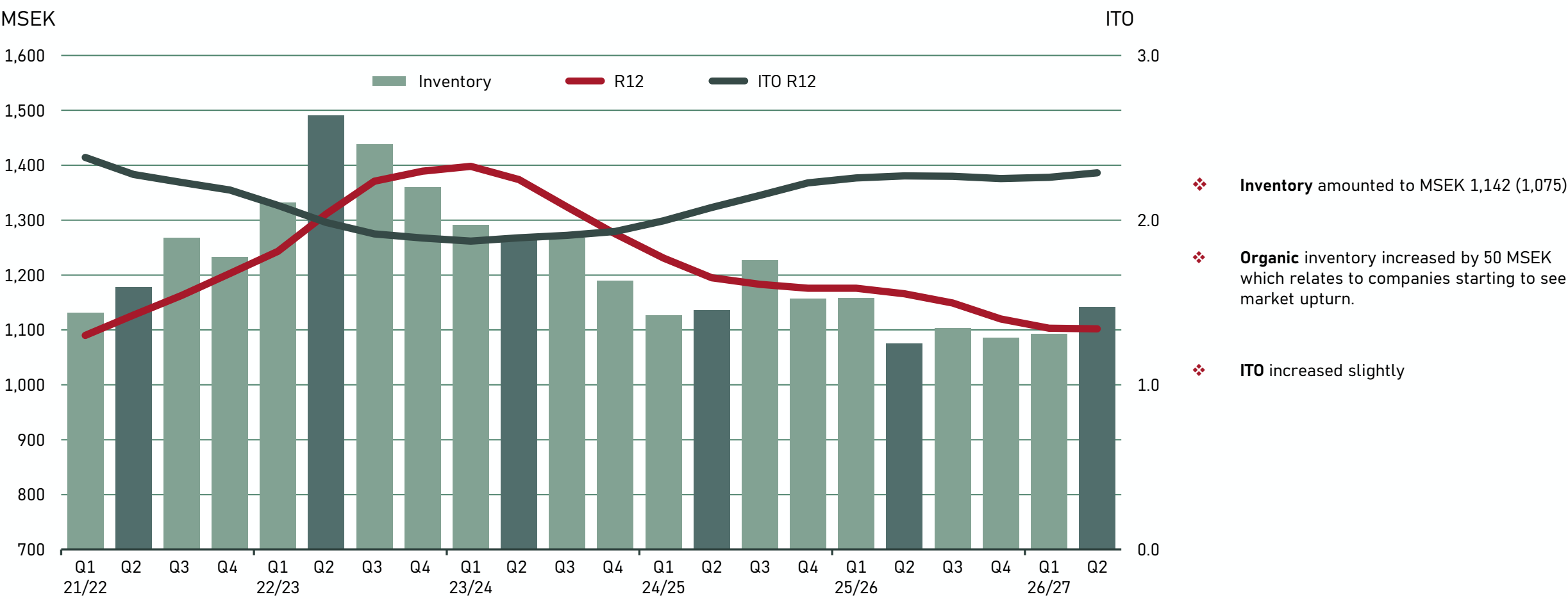
>10%

Adjusted for non-recurring items

EPS CONTINUES TO IMPROVE



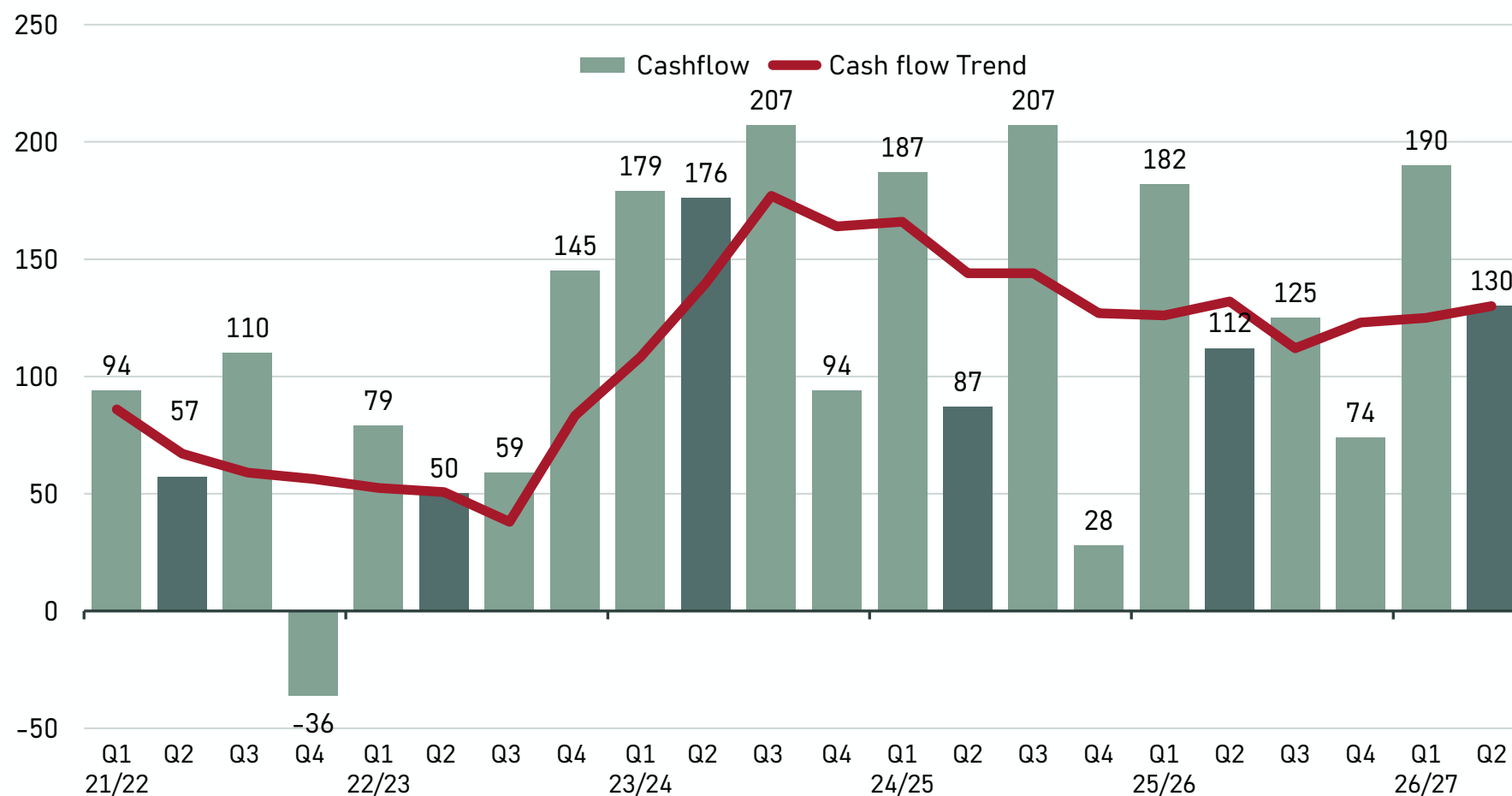
INVENTORY LEVEL – INCREASING IN COMPANIES WITH GROWTH



CASH FLOW FROM OPERATING ACTIVITIES – SLIGHTLY ABOVE PLAN

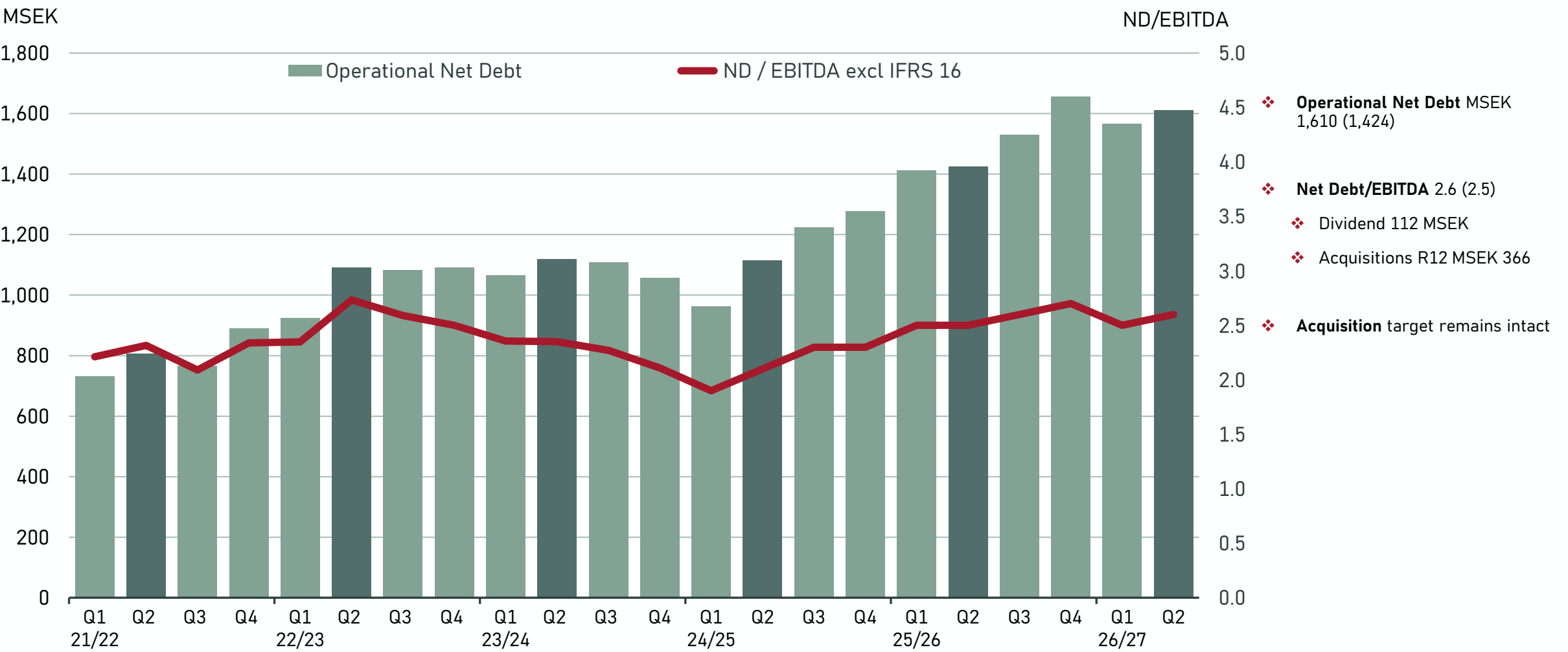
Cash flow per quarter

MSEK



- ❖ Cash flow operating activities MSEK 130 (112)
- ❖ Slightly above plan

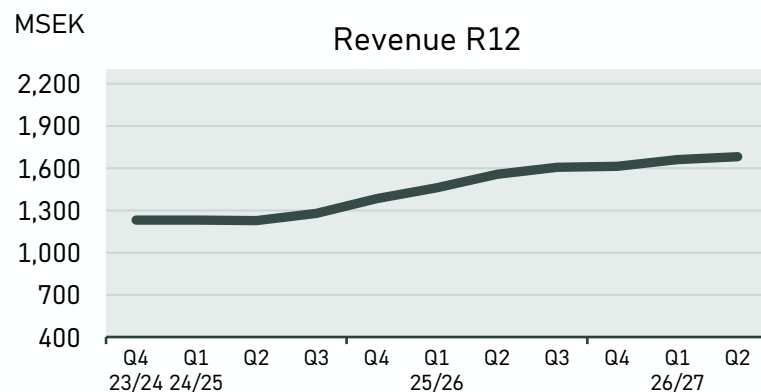
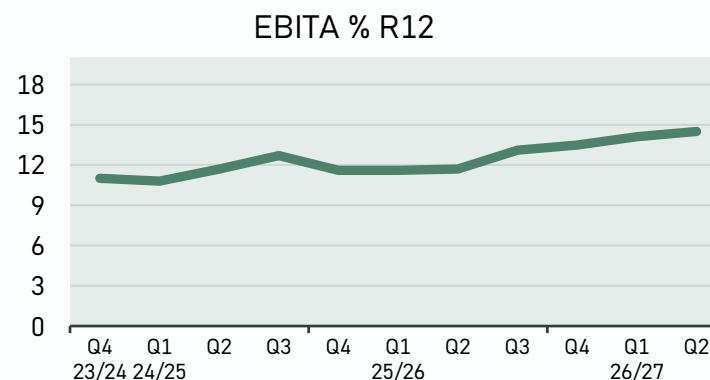
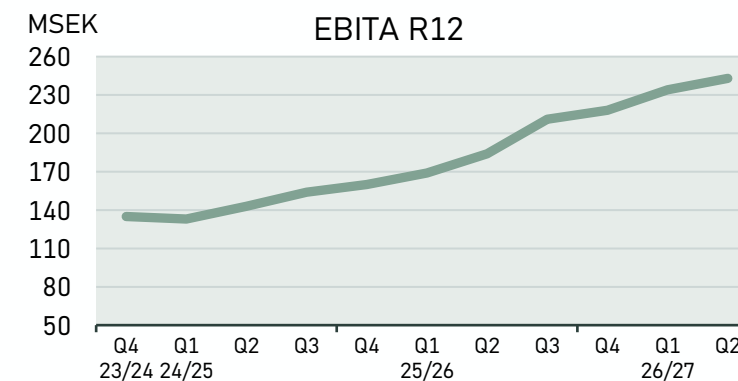
SLIGHTLY INCREASED NET DEBT



CORE SOLUTIONS

Increased revenue, including organically, as well as profit, profit margin, and return

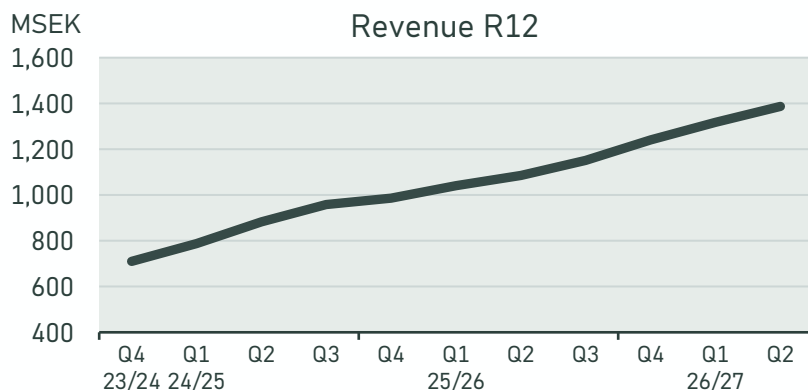
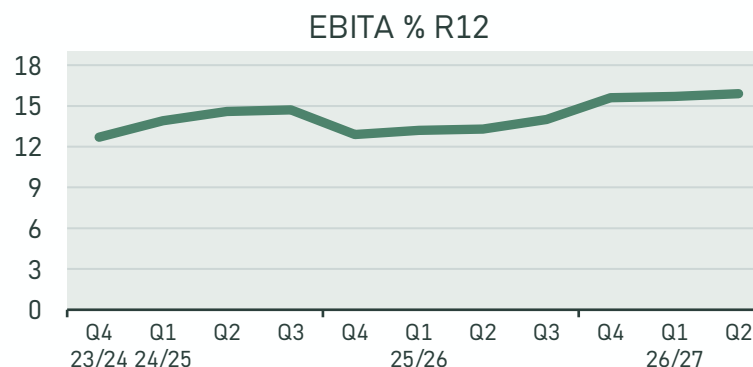
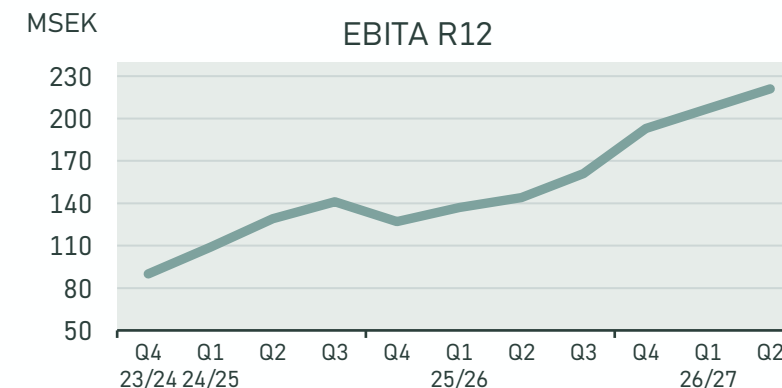
- ❖ **Revenue increased 5 percent** to MSEK 415 (394)
 - ❖ Increase in 6 out of 9 of the division's companies
 - ❖ Nordic picking up, UK sluggish
- ❖ **EBITA increased by 16 percent** to MSEK 65 (56)
 - ❖ Essve strongest contributor
- ❖ **EBITA margin increased** to 15.7 percent (14.2)
 - ❖ 6 companies on or above group level



SAFETY TECHNOLOGY

Increased revenue, including organically, as well as profit, profit margin, and return

- ❖ Revenue increased 25 percent to MSEK 346 (277)
 - ❖ Primarily acquisitions - organic performance more mixed
 - ❖ Fire Safety, Signage, and Safety Equipment double digit growth
 - ❖ 10 out of 12 companies had revenue growth
- ❖ EBITA increased by 38 percent to MSEK 51 (37)
 - ❖ 7 out of 9 double digit growth- all 3 acquisitions perform
 - ❖ Cresto biggest organic profit growth contributor
- ❖ EBITA margin increased to 14.7 percent (13.4)
- ❖ Collinder, a subsidiary within the Signage (SIS) cluster, acquired Håva-Skyltar.



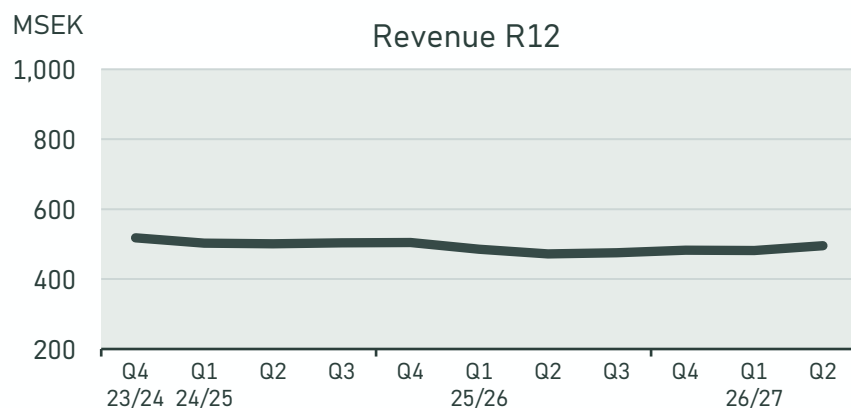
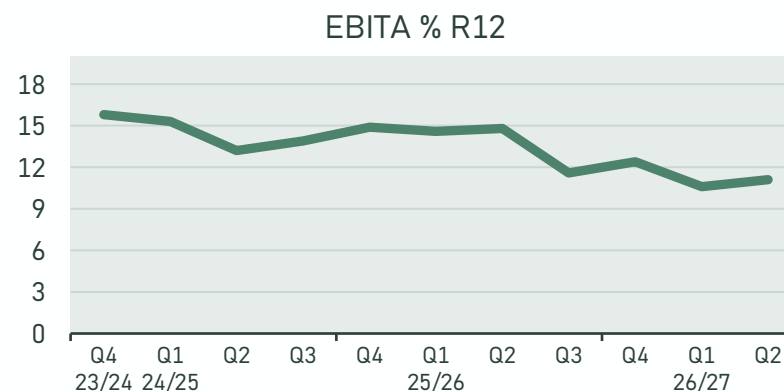
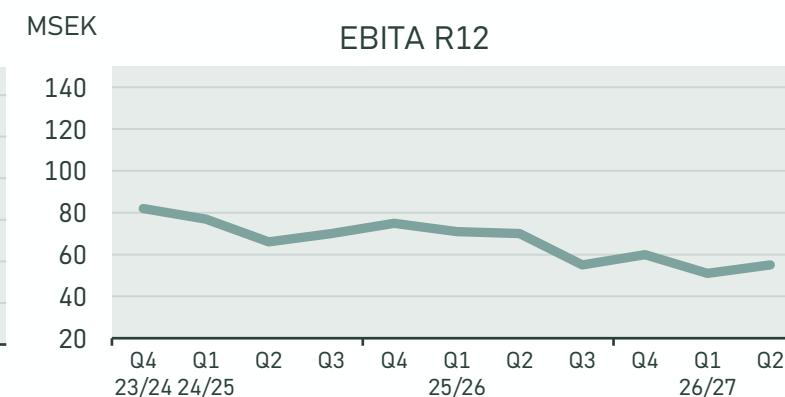
MACHINERY & EQUIPMENT

Increased revenue, including organically, as well as profit, profit margin, and return

- ❖ **Revenue increased 13 percent to MSEK 115 (102)**
 - ❖ Recovered after a weak first quarter
 - ❖ Sheet metal-, Heat&Welding-, and Measure Equipment growth ,
 - ❖ Building Equipment still weak
- ❖ **EBITA increased 44 percent to MSEK 13 (9)**
 - ❖ All companies profitable
- ❖ **EBITA margin increased to 11.3 percent (8.8)**
 - ❖ Margin improvement opportunities
 - ❖ Majority of companies below group margin



Initial focus is to restore and strengthen margins and returns, followed by complementary acquisition



PPE & UTILITIES

Lower earnings, margins, and returns

- ❖ **Revenue totalled MSEK 344 (350)– Flat adjusted for divestment**
 - ❖ Luna and Teng Tools held back by weak demand, particularly in Norway
 - ❖ Skydda's integration new owner temporarily reduced PPE sales, while new direct customers are strengthening the PPE company's long term.
- ❖ **EBITA totalled MSEK 18 (30)**
 - ❖ Most of the division's product companies within PPE continued to perform well
 - ❖ Restructuring cost remaining Skydda business (BBSafety) 7 MSEK
- ❖ **EBITA margin totalled 5.2 percent (8.6)**
 - ❖ Luna still on low single digit
 - ❖ Majority of division companies at or above group level

LUNA GROUP

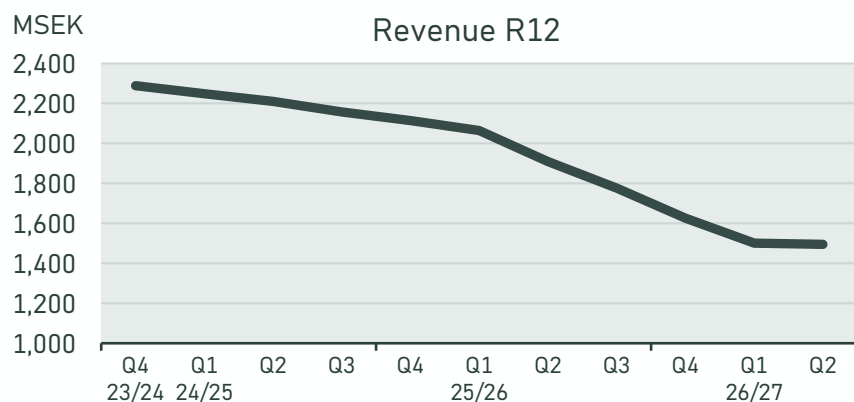
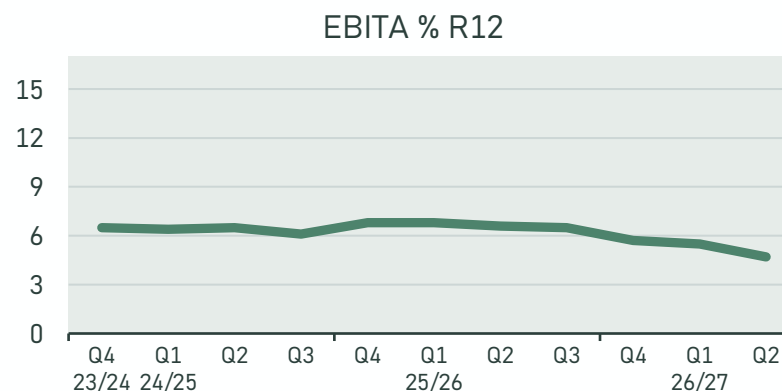
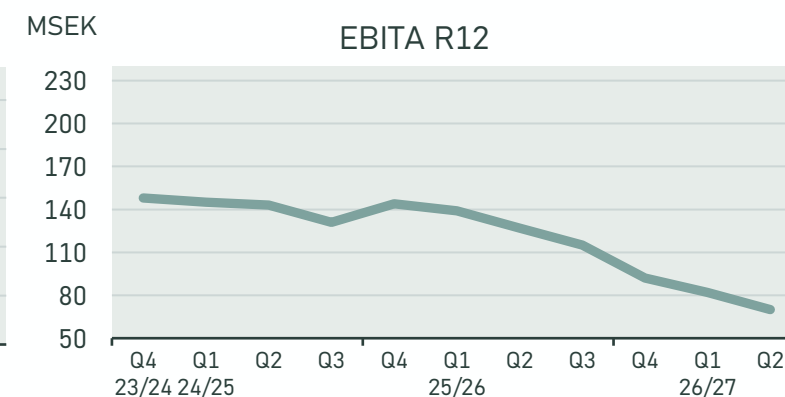


TENGTOOLS

GUIDE


ZEKLER


Develop existing companies to improve margins and returns. Acquisitions not near-term priority



TOWARDS THE TARGET 500/TEN/45

ALBEIT WITH SEVERAL QUARTERS OF DELAY

UNDERLYING MARKET

- ❖ Geopolitical **uncertainty** and an **unpredictable** economic environment
- ❖ Indication **emerging cost inflation** – increasing material, production and freight costs

WHAT WE ALWAYS DO

- ❖ **Profit expansion over revenue growth**
- ❖ **B&B Focus Model** guides capital allocation company-by-company
- ❖ Group support – **B&B Tool Box**
- ❖ **Acquisition** of highly profitable B2B companies with leading positions in growing niche markets

CURRENT GROUP THEMES

- ❖ **Inventory (ITO)** back to 'pre-corona' levels & continued **profit expansion**
- ❖ **Gross margin protection incl, price adjustments**
- ❖ **Capitalize** when a **stronger underlying market**

Contact

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Calendar



5 February 2027

Interim Report 1 April – 31 December 2026



14 May 2027

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SHAPING GREAT COMPANIES SINCE 1906