



Interim Report Jan-Sep 2026

Martin Hansson, CEO
Carolina Nerman, CFO

21 October 2026



Q3 highlights



Strong underlying growth, both organic and acquired



Strengthened Nordic fasteners position through acquisition of Arvid Nilsson

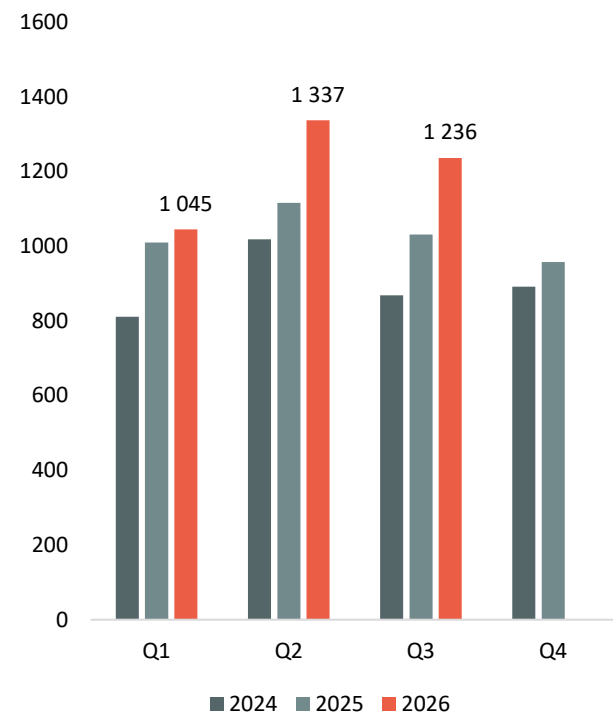


Positive momentum in many of our segments

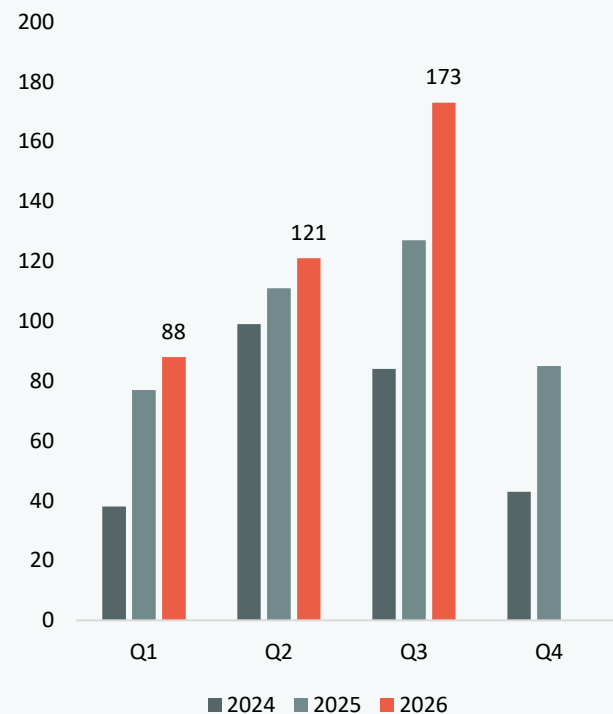


Financial development, Q3 2026

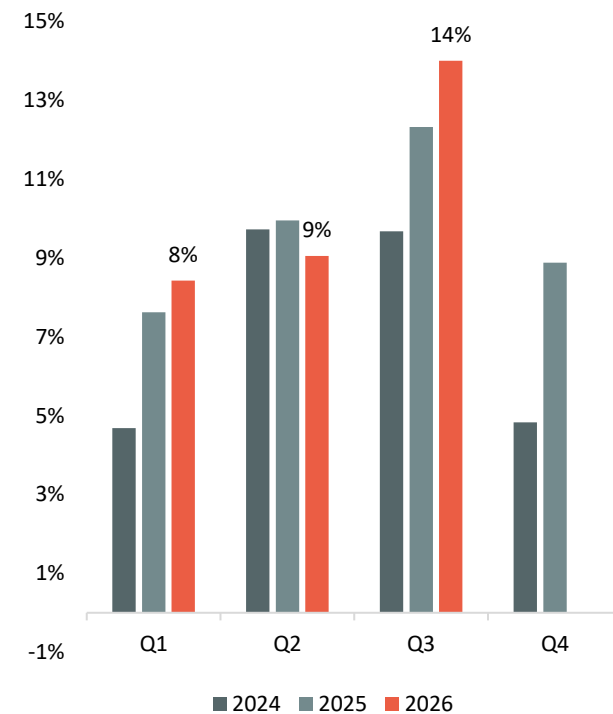
Net sales, SEK m



EBITA, SEK m



EBITA margin, %

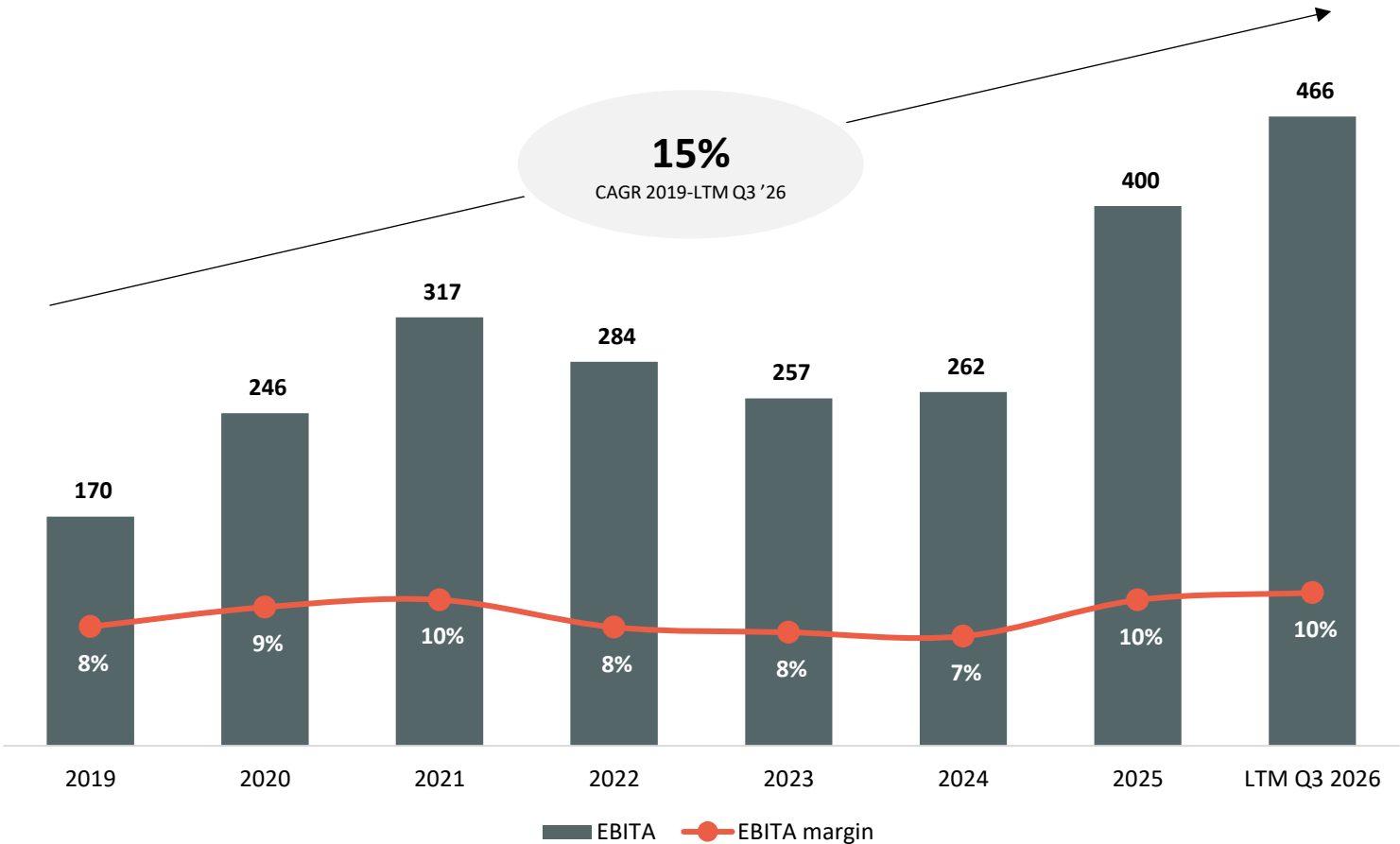


Strong financial development in the quarter, driven by both organic and acquired growth

Financial development, LTM Q3 2026

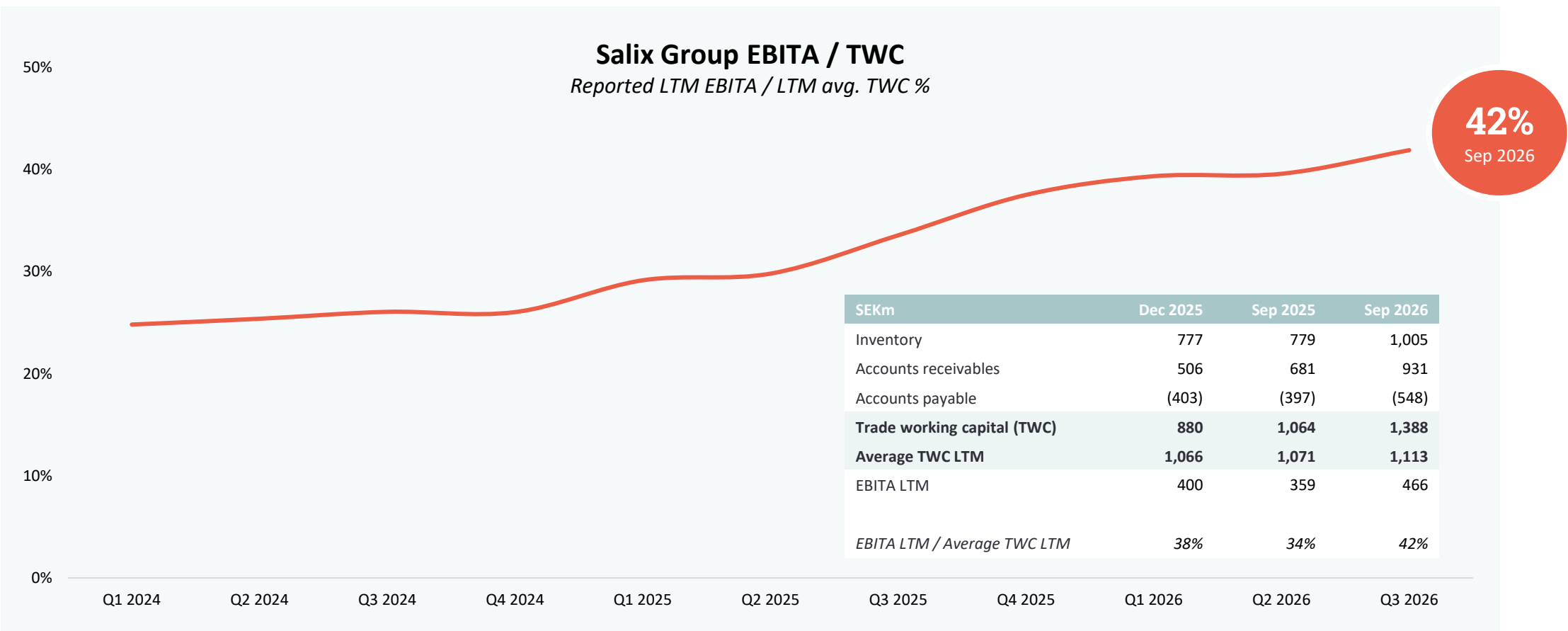
Net sales
SEK **4,575** m
(2025: 4,049)

EBITA
SEK **466** m
(2025: 359)



EBITA development shows a strong and positive long-term trend, with acquisitions as an important tool to mitigate market downturns and complement to organic growth

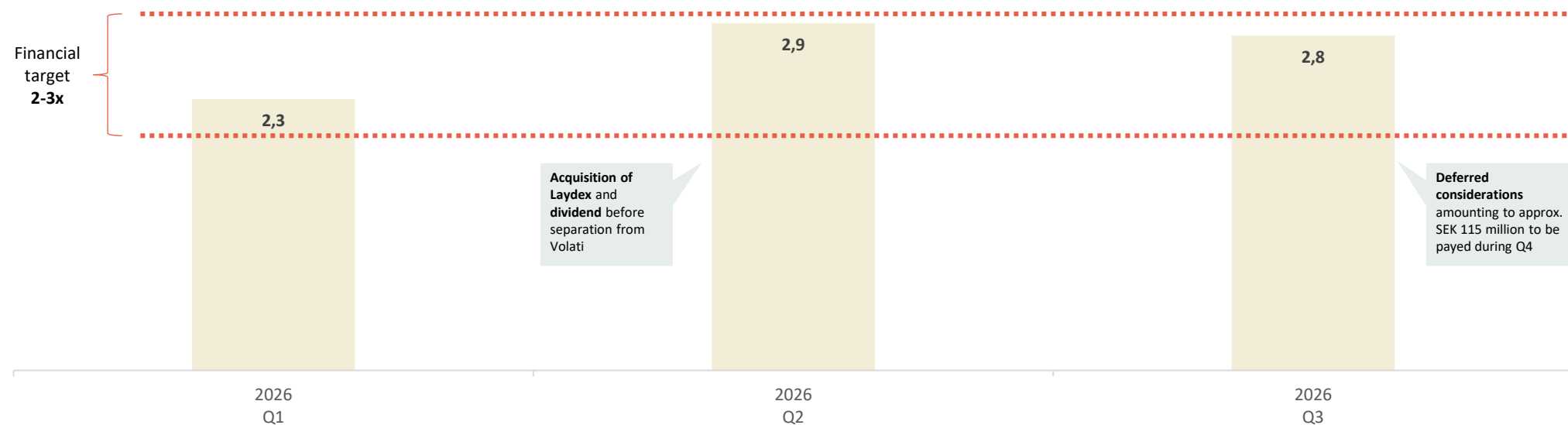
Efficient capital allocation increases EBITA/TWC and we continue to deliver on our financial target



Increased profitability, driven by both M&A and organic growth, and working capital discipline enable us to exceed our financial target in the quarter – key activities include disciplined inventory management and systematic work with payment terms

Debt ratio decreasing despite acquisition in Q3

Net Debt/Adjusted EBITDA



ND/EBITDA is within our financial target and decreased during the quarter, despite the acquisition of Arvid Nilsson. Current momentum in earnings combined with historical seasonality patterns for cash flow leaves headroom for continued growth through acquisitions.

Financial targets

Net sales growth

Average annual total net sales growth, including acquisitions, of at least 15 percent over a business cycle.

13%

LTM Q3 2025: 17%

EBITA margin

Long-term LTM EBITA margin of at least 12 percent.

10%

LTM Q3 2025: 9%

EBITA/TWC

LTM EBITA in relation to average trade net working capital LTM of at least 40 percent.

42%

LTM Q3 2025: 34%

Net Debt/ Adj. EBITDA

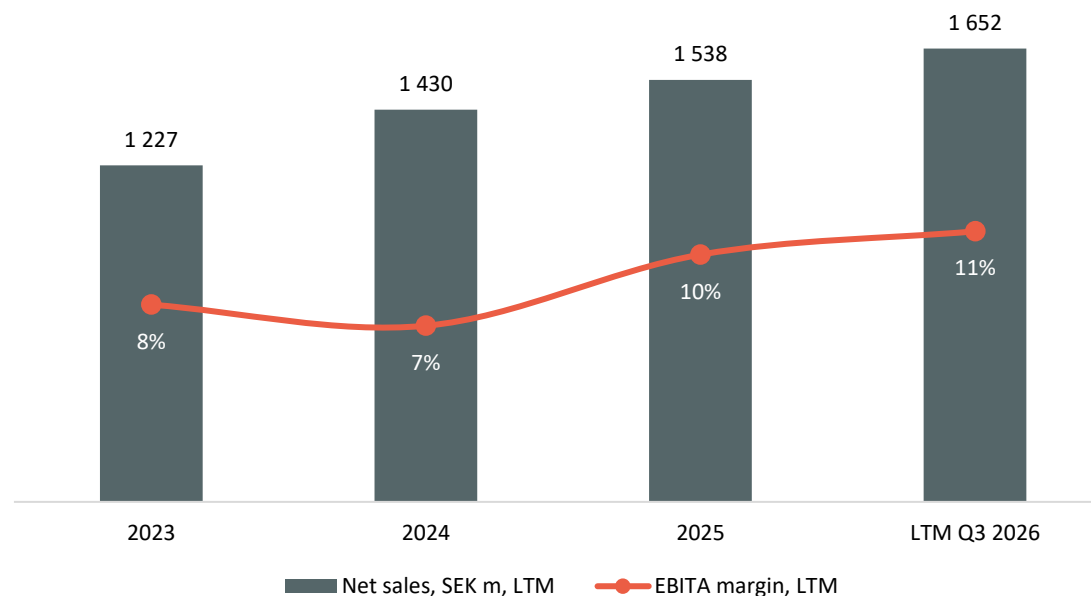
Normalised net debt in relation to LTM adjusted EBITDA of 2-3 times and not exceeding 3.5 times.

2.8x

Q3 2025: 2.8x

Consumables Trade & Agriculture

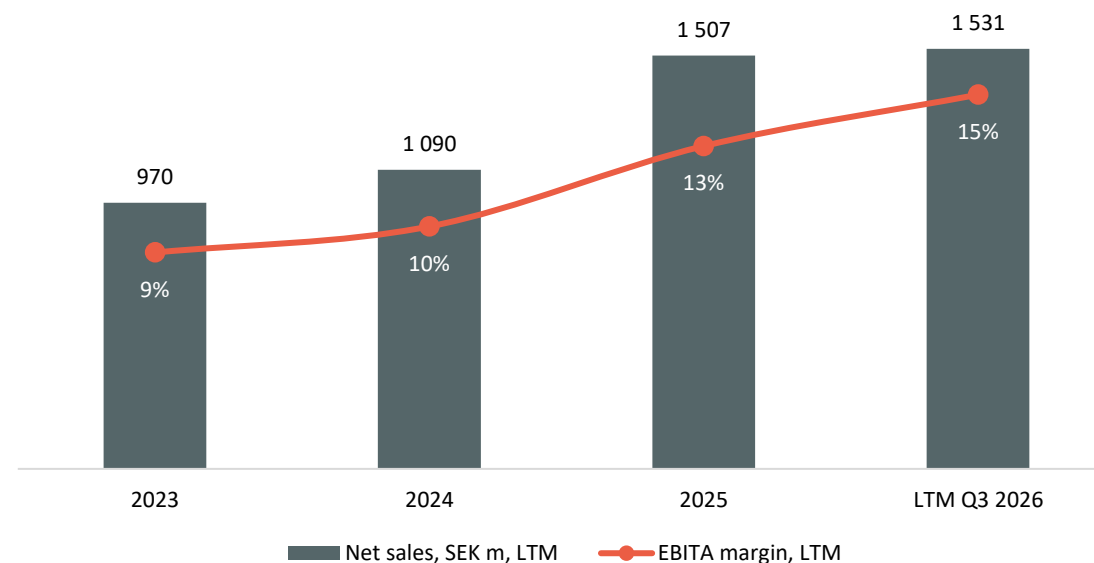
- Net sales growth of 8 percent, driven by both organic and acquired growth
- Continued positive momentum in DIY segment – professionals and industry-related customers still more cautious
- Integration of Arvid Nilsson ongoing and according to plan



	Q3 2026	Q3 2025	LTM Q3 2026	FY 2025
Net sales, SEK m	448	414	1 652	1 538
Net sales growth, %	8%	17%	8%	8%
EBITA, SEK m	62	65	181	154
EBITA margin, %	14%	16%	11%	10%
Items affecting comparability	-3	11	-2	11
EBITA/TWC, %	42%	34%	42%	36%

Home & Fittings

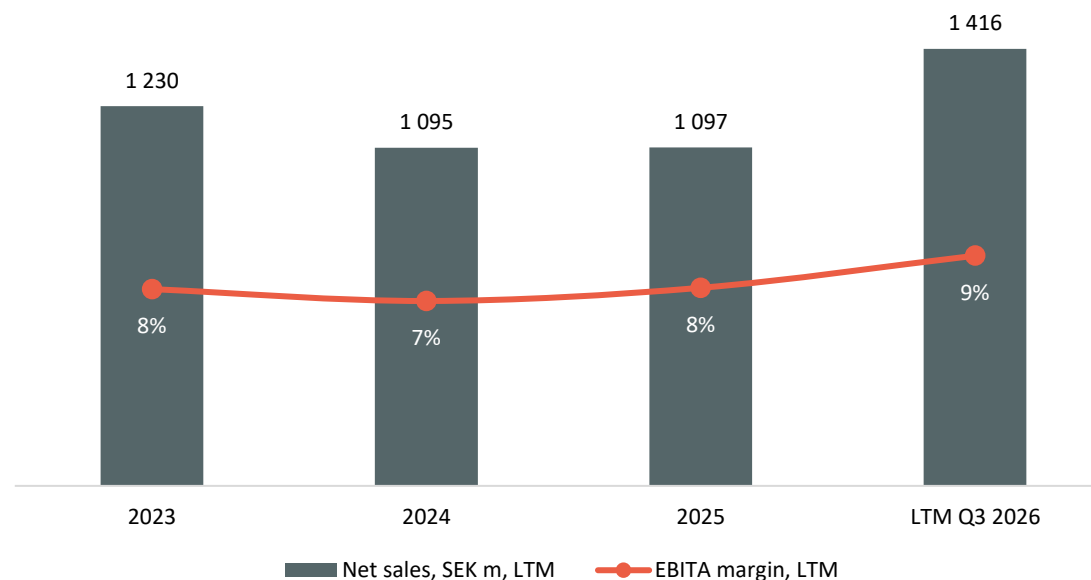
- EBITA growth of 24 percent in the quarter
- Growth driven by strategic pricing, customer and product mix, and favourable currency effects
- Structural measures and operational improvements strengthens margins



	Q3 2026	Q3 2025	LTM Q3 2026	FY 2025
Net sales, SEK m	376	370	1 531	1 507
Net sales growth, %	2%	40%	6%	38%
EBITA, SEK m	71	57	232	197
EBITA margin, %	19%	15%	15%	13%
Items affecting comparability	3	-6	-20	-15
EBITA/TWC, %	51%	35%	51%	42%

Construction & Packaging Solutions

- Strong sales and EBITA development, mainly driven by Laydex but also organic growth
- Some signs of recovery in industry-related segments, particularly in the Swedish market



	Q3 2026	Q3 2025	LTM Q3 2026	FY 2025
Net sales, SEK m	418	255	1 416	1 097
Net sales growth, %	64%	0%	29%	0%
EBITA, SEK m	50	21	132	88
EBITA margin, %	12%	8%	9%	8%
Items affecting comparability	-	-	-17	-
EBITA/TWC, %	53%	50%	53%	50%

Acquisition of Arvid Nilsson

Key highlights

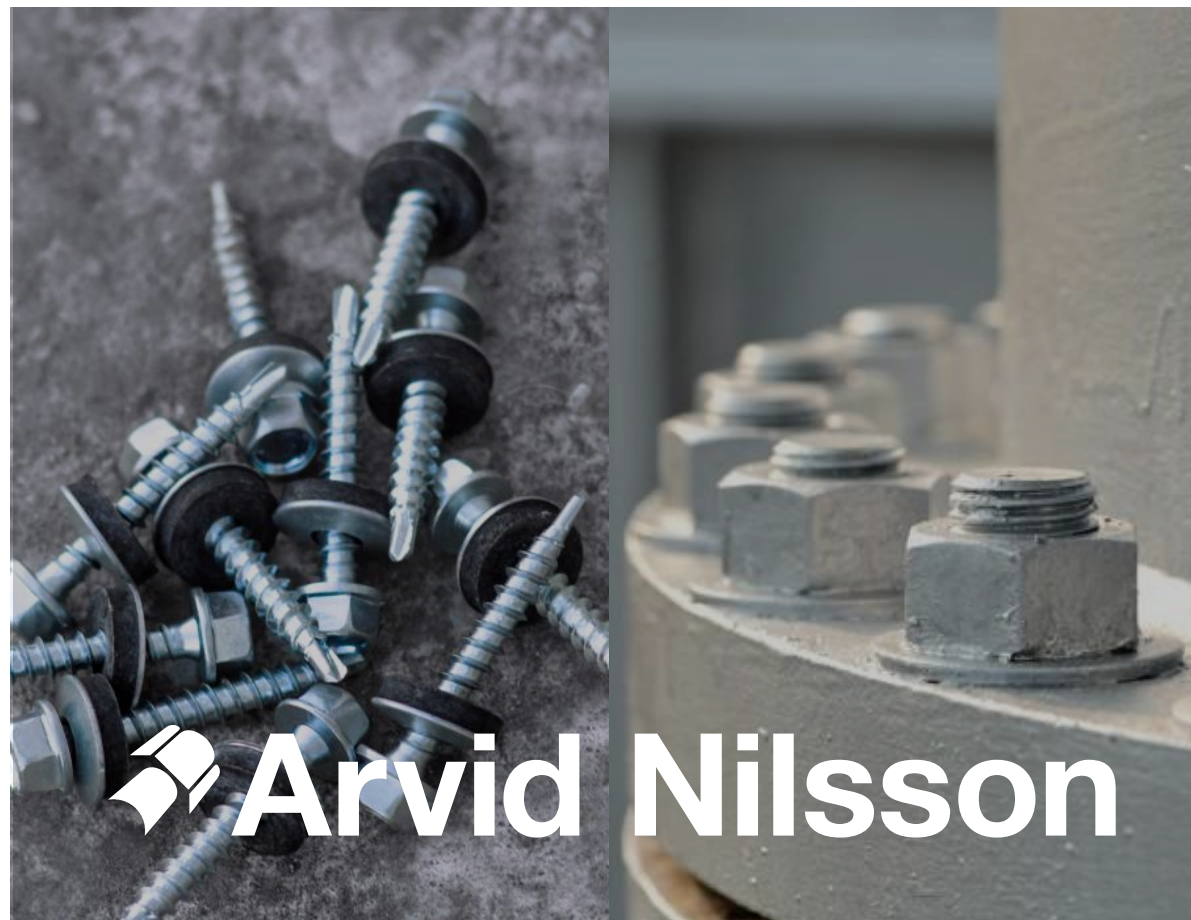
- Strengthened position in the Nordic fasteners market
- Strong strategic fit and over 100 years experience to build from
- Identified opportunities for synergies and margin expansion

Net sales

~ SEK **250** m

EBITA margin

~ **8%**



Growth through acquisitions is an integral part of Salix Group's strategy



Consumables Trade & Agriculture

Trejon 300 SEK m
December 2023 Net sales

Hans Eggestrand 45 SEK m
April 2025 Net sales

Arvid Nilsson 250 SEK m
August 2026 Net sales



Home & Fittings

Beslag Design 190 SEK m
February 2024 Net sales

Timberman 420 SEK m
December 2024 Net sales



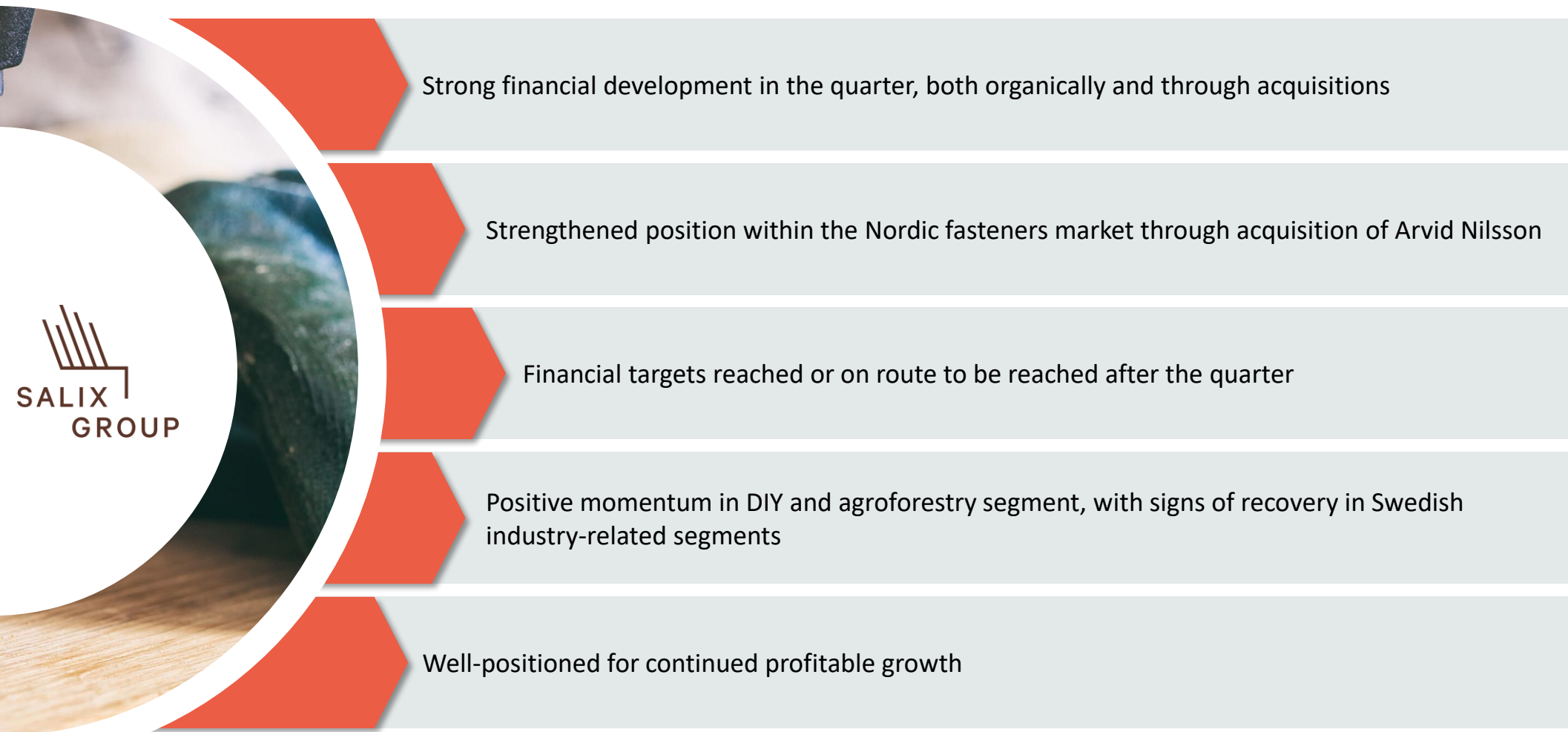
Construction & Packaging Solutions

Sweja 96 SEK m
May 2023 Net sales

Laydex 480 SEK m
April 2026 Net sales

Salix Group has a scalable and proven model for growth through M&A – leveraging in-house capabilities, strong market knowledge, and commercial edge

Summary



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This presentation is provided for convenience only. In the event of any discrepancy between this presentation and the published interim report, the interim report shall prevail.