



Q1

Interim Report January – March 2026

LOGISTRI FASTIGHETS AB (publ)



Quarter January – March 2026

→ Quarter January - March 2026

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- Revenue increased by 28.3% to SEK 52.1 million (40.6).
- Net operating income increased by 28.5% to SEK 48.4 million (37.6), and the surplus ratio amounted to 92.8% (92.6).
- Income from property management increased by 20.6% to SEK 24.5 million (20.3).
- Profit for the period increased by 74.9% to SEK 52.4 million (30.0), corresponding to SEK 0.54 per share (0.41).
- Changes in value of investment properties affected profit by SEK 23.6 million (21.8).
- Changes in value of financial instruments affected profit by SEK 16.5 million (-0.3).

Significant events during the quarter

During the period, two project properties in Ludvika were acquired. The properties will house Hitachi Energy Sweden AB's new logistics center of 103,000 sqm. The project is expected to be completed in Q2 2027.

Significant events after the end of the period

At the Annual General Meeting, Cecilia Ekeblom and Johanna Bjärnemyr were elected as new Board members. At the same time, Helena Elonson declined re-election and has therefore left the Board.

A fast-growing real estate company with a focus on cash flow

Logistri is in a strong growth phase where ongoing projects and investments are expected to significantly increase earnings per share in the coming years. At the same time, preparations continue for a listing on the Nasdaq Main Market, which represents a natural next step in the company's development and strengthens the platform for continued long-term value creation.

	Jan - mar	Jan - mar	Jan - dec	Apr - mar
Selected Key Ratios	2026	2025	2025	2025/2026
Revenue, SEK million	52,1	40,6	183,8	195,3
Net operating income, SEK million	48,4	37,6	168,6	179,4
Surplus rate, %	92,8	92,6	91,7	91,8
Profit from property management, SEK million	24,5	20,3	82,9	87,1
Profit for the period, SEK million	52,4	30,0	135,3	157,8
Property value, SEK million	3 394,6	2 294,0	2 941,5	3 394,6
Economic occupancy rate, %	99,8	98,5	98,5	99,8
Remaining lease period, year	7,9	7,2	7,4	7,9
Property property yield, %	5,8	7,2	6,5	5,8
Interest coverage ratio, times	2,4	2,6	2,3	2,3
Net loan to value	44,6	48,9	43,3	45,6
Key ratios per ordinary share A and B				
Profit from property management, SEK	0,25	0,28	1,06	1,04
Profit for the period, SEK	0,54	0,41	1,73	1,87
Net asset value, SEK	17,41	16,56	17,10	17,41

For definitions, see page 29. For reconciliation of key ratios, see page 30.

*Adjusted for the carrying amount of capitalized project costs in Ludvika, the average yield amounts to 6.6% for January to March 2026.





Comment by CEO

Strong start to the year

Logistri starts the year with a stable development. In 2025, the property portfolio grew strongly and during the first quarter we continued to optimise the portfolio through both acquisitions and divestments. This is reflected in a positive earnings trend, with rental income increasing by 28.3%, net operating income by 28.5% and profit from property management by 20.6% compared with the corresponding period last year. Our properties are in principle fully leased and the surplus ratio remains high.

Projects and future earning capacity

Together with Torngrund, we are building a logistics centre in Ludvika for Hitachi Energy. The project is one of Sweden's largest logistics construction projects, if not the largest, and upon completion it will house a leasable area of 103,000 m2. It is very gratifying to see that the project is progressing according to plan and now the frame has begun to rise from the hill.

The investment has a very large impact on our future earnings capacity. If the project had been completed today, our earnings capacity would have increased from SEK 1.01 per share to SEK 1.55 per share, corresponding to an increase of 53%. For further information, please refer to the Earning capacity section on page 4.

Mot Nasdaq Main Market

We are now entering an intensive and strategically important phase with full focus on preparations for a relisting to the Nasdaq Main Market. The ambition is to list the company on Nasdaq Main Market in the middle of the second half of 2026.

A listing on the Nasdaq Main Market represents a milestone in Logistris' continued development and strengthens the company's position in the capital market. The relisting is expected to create conditions for a broader institutional investor base, increased equity liquidity and improved access to capital on competitive terms. At the same time, the company's brand and credibility are strengthened in relation to tenants, banks and other partners.

The work on the relisting also means that the organization is further developed and adapted to the requirements placed on a company listed on a regulated market, with a continued focus on transparency, governance and long-term value creation for shareholders. We are creating a stronger platform for continued growth.

Financial position in a changing world

Geopolitical developments, with ongoing conflicts in the Middle East, will have consequences, but it is not possible at present to determine their full effect. Financial markets are governed by news and headlines that have had a negative impact on the fixed income market, especially for longer maturities. Logistri has a defensive approach to interest rate risk and has entered into interest rate derivatives to mitigate the impact of these rapid changes.

During the period, the impact on profit from property management and cash flow was very limited. On the other hand, there is a positive unrealised change in the value of our financial instruments, which does not affect cash flow. The fact that the value is increasing is a sign that our interest rate hedging strategy is working to reduce the risks that we do not control ourselves.

Focus ahead

Logistri continues its growth journey with a focus on implementing the project in Ludvika and completing preparations for the Nasdaq listing. With a strong start to the year, I look forward to continuing to develop the company in line with our goals of long-term growth and profitability.



David Träff
Verkställande Direktör

"Stable development in the existing portfolio, fully leased properties and continued high surplus ratio. Acquisitions and projects strengthen earnings capacity."

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Earning Capacity

Current earning capacity

Current earnings capacity is based on the property portfolio owned at the end of the period and constitutes a twelve-month illustration of Logistris' earnings capacity at that time.

It is important to note that the earning capacity is not comparable to a forecast for the next twelve months, as it does not include, for example, any assessments regarding the development of rents, future vacancies, acquisitions, development projects or unforeseen costs.

Income is based on the property portfolio and leases entered into at the end of the period. Revenues are based on current rent levels and service surcharges, less any discounts and current vacancies.

The property costs are based on experiential normal annual values and include current property tax.

Administrative costs are calculated based on the current organization and the estimated annual costs at the end of the period.

Net financial items have been based on the Group's interest expenses in accordance with financing and interest rate hedging agreements entered into and the prevailing market interest rate at the end of the period. Net financial items also include the recognition of set-up costs and site leasehold fees in accordance with IFRS16. Financial income is included. One-off costs are excluded

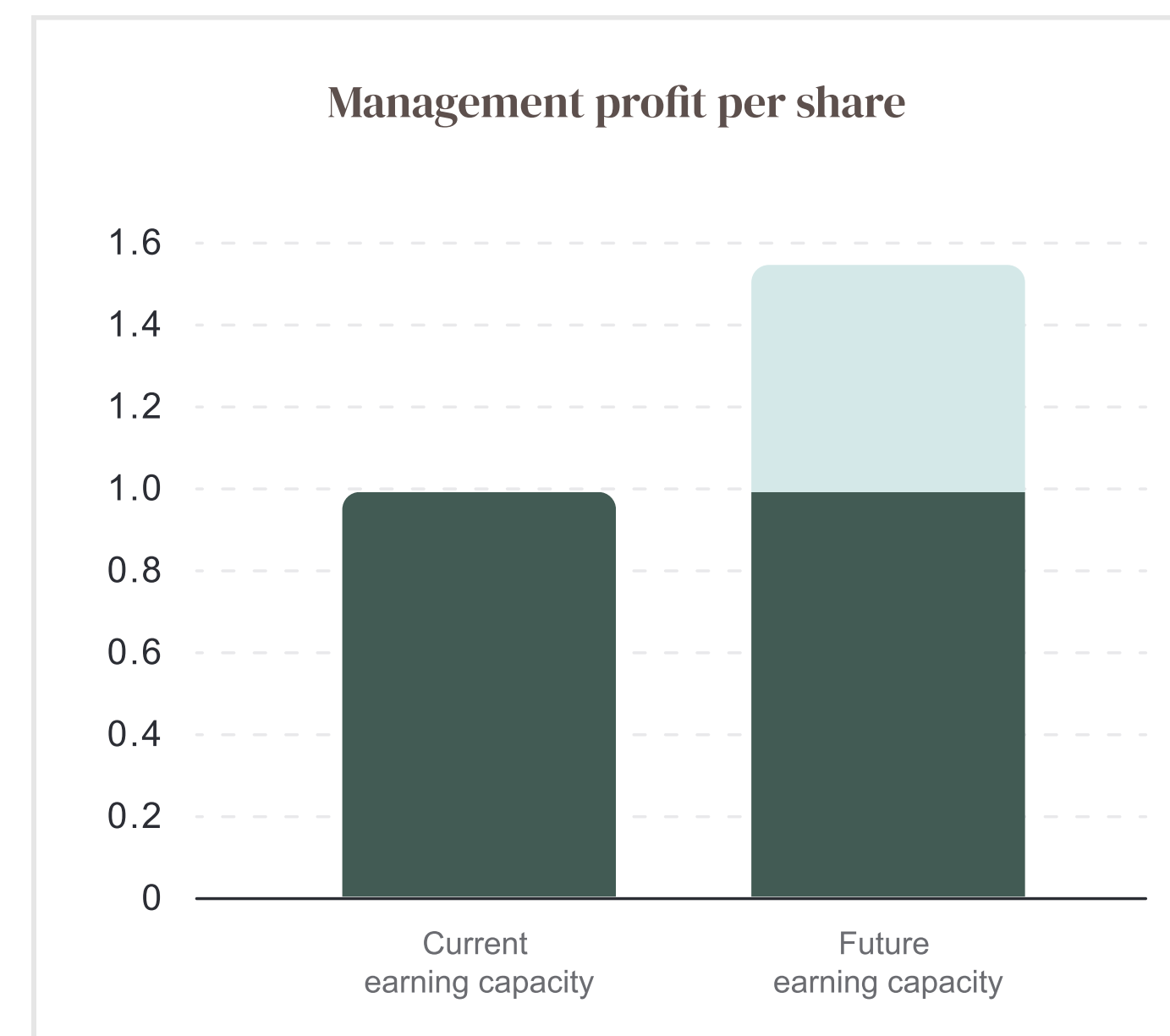
SEK million	1 april 2026	Future earning capacity
Revenue	217 348	311 960
Property costs	-16 907	-21 542
net operating income	200 441	290 418
Administration costs	-22 148	-22 648
Finance	-80 376	-109 014
Profit from property management	97 917	158 756
Profit from property management per share	1,01	1,55

Future earning capacity

To illustrate the assessed development of Logistris' earning capacity due to major ongoing projects, a future earning capacity is presented. The assessment is made based on current earning capacity combined with the earning capacity from Logistris' ongoing projects in Ludvika.

In future earning capacity, the following assumptions are made. Net operating income is based on the base rent, which has not been indexed with inflation but is based on today's monetary value. Net operating income is reduced by a financing cost assumed to correspond to the Group's current average interest rate and a loan-to-value ratio of 52% based on the agreed property value.

No changes to Logistris' organization are adopted. Future earning capacity is recalculated to SEK per share based on the number of shares after payment, of the estimated earn-out price to the seller as of the year-end date, i.e. after expected dilution at the end of settlement of the project.



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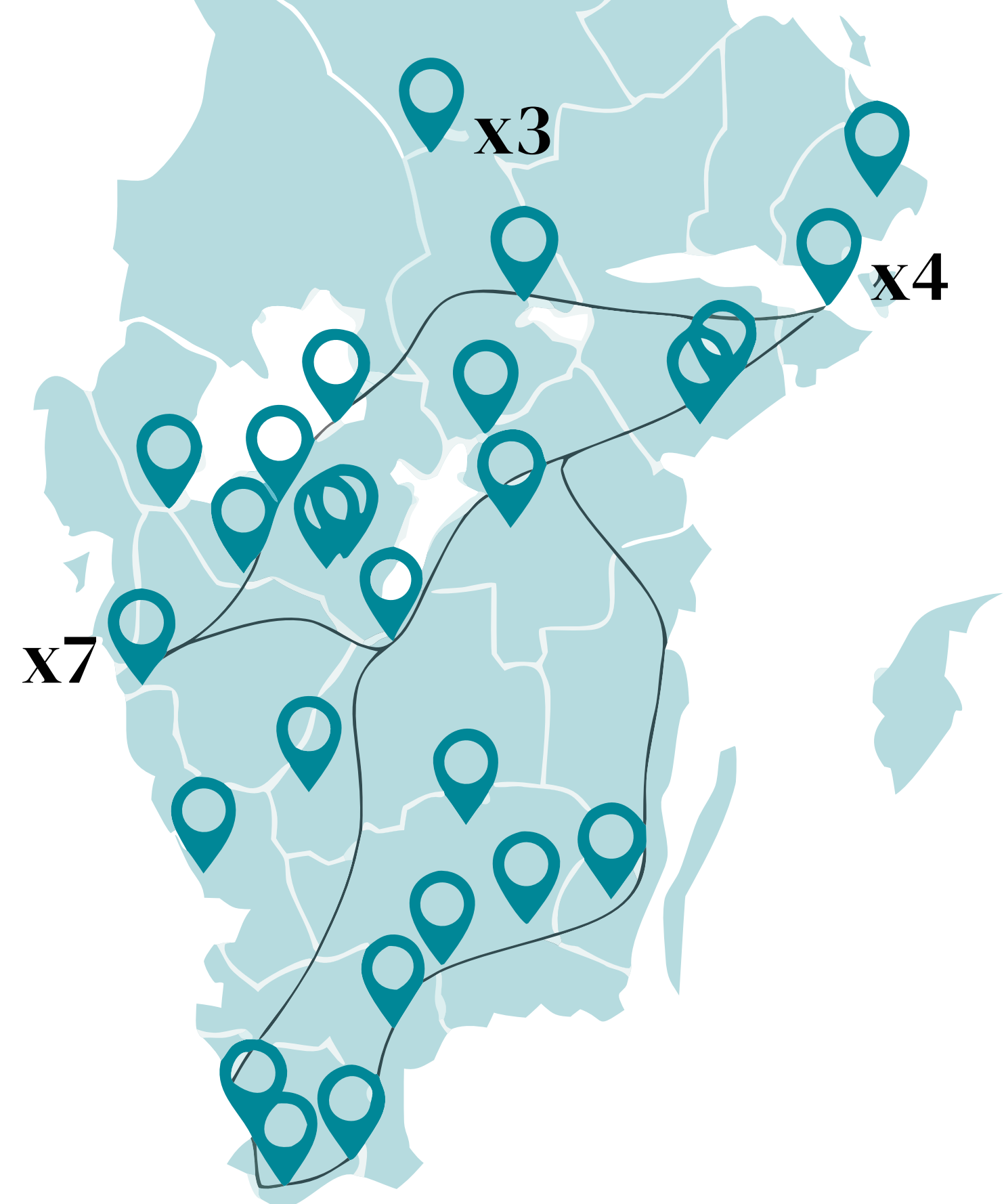
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Logistri Fastighets AB (publ)
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Logistri in brief – a cash flow-driven growth case

Logistri is a real estate company that owns and manages business-critical light industry and warehouse properties in Sweden. The company operates in a property segment where tenants are highly dependent on premises with business-critical functions integrated into the properties, often including production, processing, or warehousing. Logistri's combination of long-term leases with terms that limit cost risks creates a long-term perspective and stable cash flows.

Together with our tenants, we develop the properties over time and create the conditions for long-term value creation in the property portfolio. In combination with a clear cash flow-focused acquisition strategy, where the tenant is a central part of the investment analysis, Logistri has shown successful growth.

Logistri offers a combination of structural growth and stable cash flows

- 1 Stable cash flows**

Logistri has an economic occupancy rate of 100% and approximately 99% of the rental income comes from triple-net agreements. This creates high predictability and limited cost risk.
- 2 High profitability**

The company has a surplus ratio of 93% and a strong profit from property management, driven by low property costs and an efficient management model.
- 3 Growth through acquisitions and projects**

Logistri combines acquisitions with value-creating investments in its existing portfolio. The ongoing project in Ludvika is expected to increase earnings capacity by approximately 53%.
- 4 Attractive risk profile**

The portfolio is characterized by long-term leases with a remaining contract term of 7.9 years and a diversified tenant mix.
- 5 Scalable platform**

The company is preparing for a listing on the Nasdaq Main Market in 2026, which is expected to strengthen access to the capital market and contribute to lower cost of capital over time.

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The road to Nasdaq Main Market

Logistri is in an intensive phase of preparations for a listing on the Nasdaq Main Market. A listing on the main market entails increased requirements for transparency, corporate governance and financial reporting, while at the same time creating conditions for a broader investor base and improved liquidity in the share.

As part of the process, the company is actively working to strengthen internal processes and governance structures, further develop financial reporting and ensure the organization's scalability for continued growth. The ambition is to complete the listing in the second half of 2026. The listing is a natural step in Logistris' development and is expected to strengthen the company's access to capital and contribute to a lower cost of capital over time.

Financial targets

- Profit from property management per ordinary share shall increase by at least 15% per year on average over a five-year period
- Return on equity shall amount to at least 15% per annum on average over a five-year period
- The net loan-to-value ratio shall not exceed 58% in the long term
- The interest coverage ratio must exceed 2.0 times





The Property Portfolio

Logistri's property portfolio is focused on light industrial and warehouse premises, which account for 96.7% of the total rental value. The proportion of office space is very limited and primarily serves as an integrated complement to production and warehouse operations. The company invests in business-critical properties, meaning that the premises constitute a central part of the tenants' operational and strategic activities. This contributes to a structurally low vacancy risk and stable demand over time.

The business model is based on long-term lease agreements, typically with a duration exceeding ten years. The leases are either indexed to inflation or include a fixed annual increase and consist to 99% of so-called triple-net agreements, whereby the tenants are responsible for the vast majority of operating and maintenance costs. Overall, this creates stable and predictable cash flows as well as high profitability.

During the period, three properties were divested, corresponding to a lettable area of 9,675 sqm, while two properties were acquired with a lettable area of 8,132 sqm.

The portfolio continues to demonstrate strong profitability with positive growth in operating surplus and an economic occupancy rate of 99.8%. The surplus ratio amounts to 92.8% after property costs, which is high from an industry perspective and reflects the efficiency of the business model.

Tenants

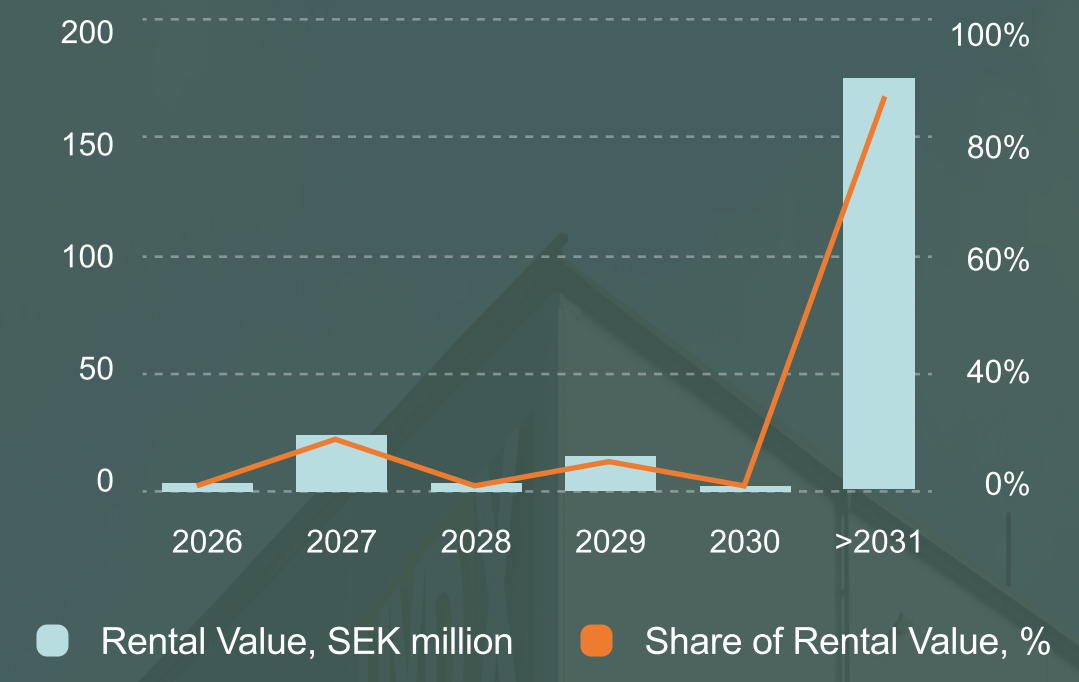
At the end of the period, Logistri had 45 tenants, with no single tenant accounting for more than 6.6% of the total rental value.

The 10 largest tenants represented 51.8% of Logistri's total rental value. The lease agreements for the 10 largest tenants consist entirely of triple-net leases with a weighted average remaining lease term of 8.0 years.

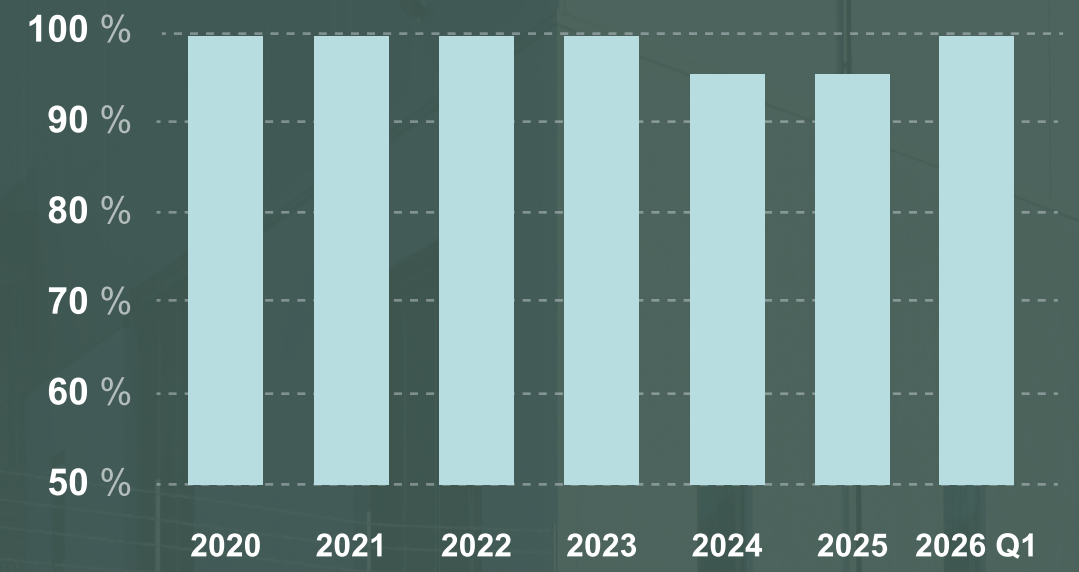
The majority of Logistri's tenants are larger, well-managed industrial companies with a long history in the properties. The tenants represent several industries and industrial segments, providing Logistri with well-diversified exposure across different sectors and reducing financial risk.

A central part of the company's investment strategy to ensure stable cash flow is the use of long-term lease agreements where tenants bear the majority of the properties' operating and maintenance costs. 99% of the company's total rental income relates to this type of lease agreement, under which the company has no or very limited operating and maintenance costs for the properties. 81% of Logistri's rental income comes from agreements with lease terms expiring in 2031 or later.

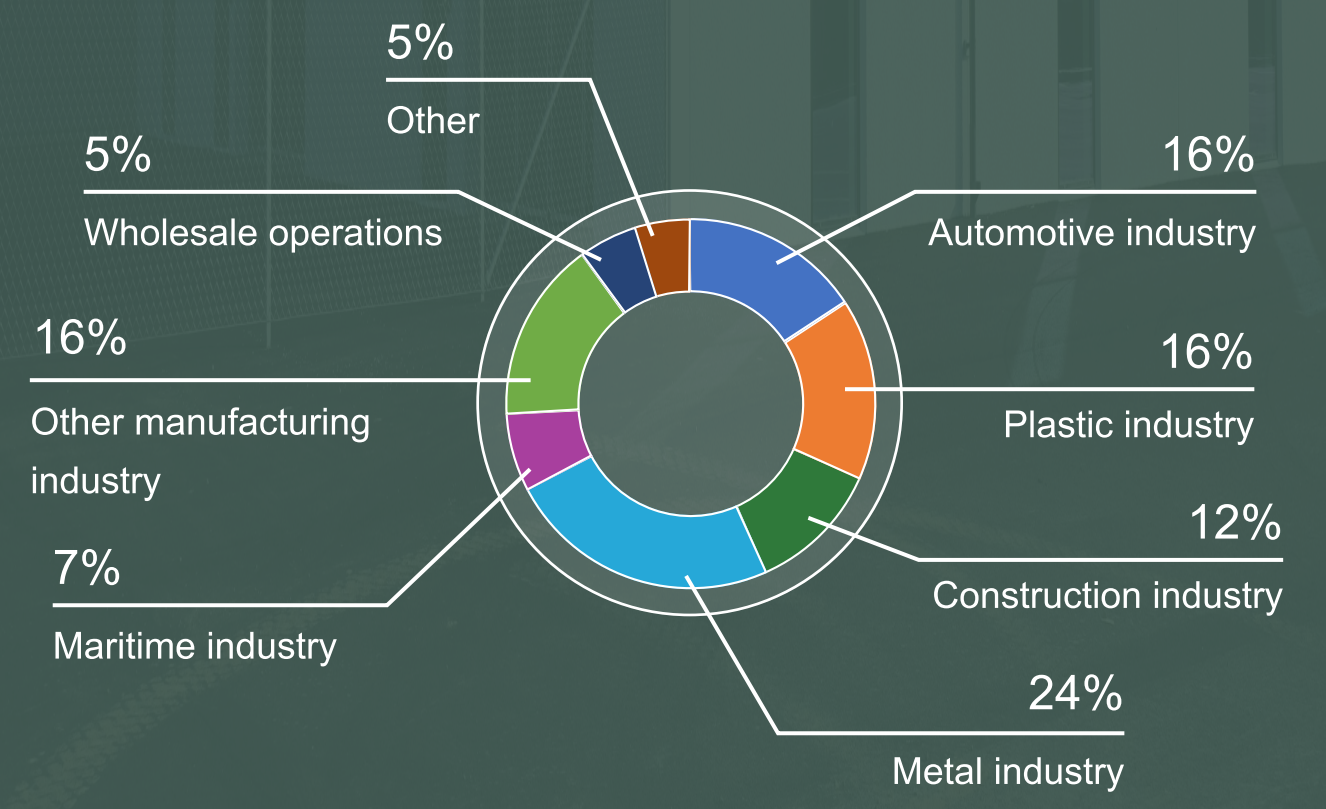
Lease Maturity Structure



Historical Occupancy Rate



Tenant Distribution



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Geographic Market Areas

Logistris' property portfolio is divided into two complementary market areas: Regional City and Metropolitan City, which together create a well-balanced combination of stable cash flows and value-driving growth.

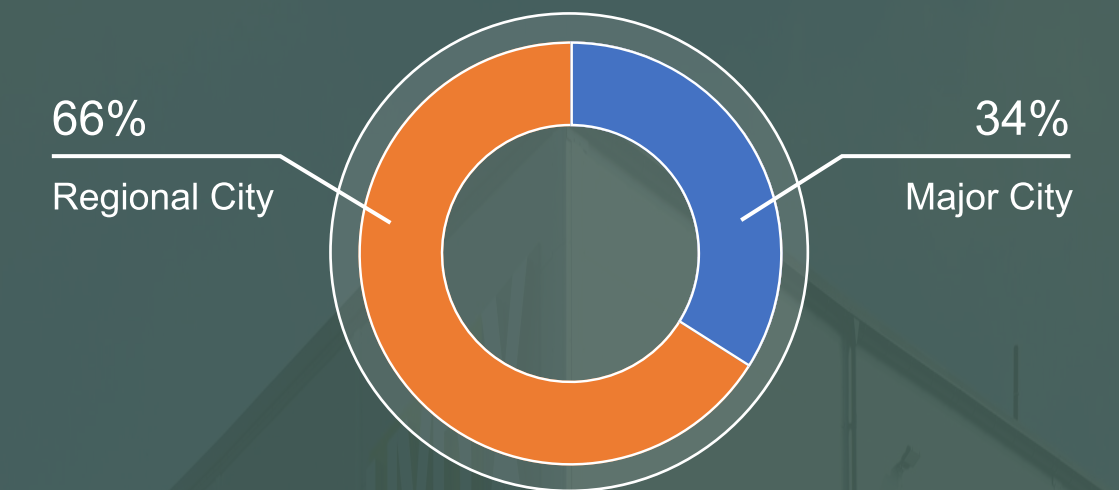
Metropolitan comprises 15 properties in light industry and warehouses in established business areas in Stockholm, Gothenburg and Malmö. The market area is characterized by more active management and clear value-creating potential, often in areas undergoing structural transformation. Logistri has a strong track record of developing these assets, with rent increases of approximately 30% in new leases and renegotiations. The economic occupancy rate in Storstad amounts to 100% and a rent-weighted remaining lease period of 5.3 years.

Regional comprises 24 properties in regional towns in southern Sweden with a strong industrial tradition. The market area constitutes the portfolio's cash flow base and is characterized by long-term leases, a high proportion of triple-net agreements and very low management costs. The economic occupancy rate amounts to 99.8% and the rent-weighted remaining lease term is 9.1 years, which provides high predictability and stability in earnings.

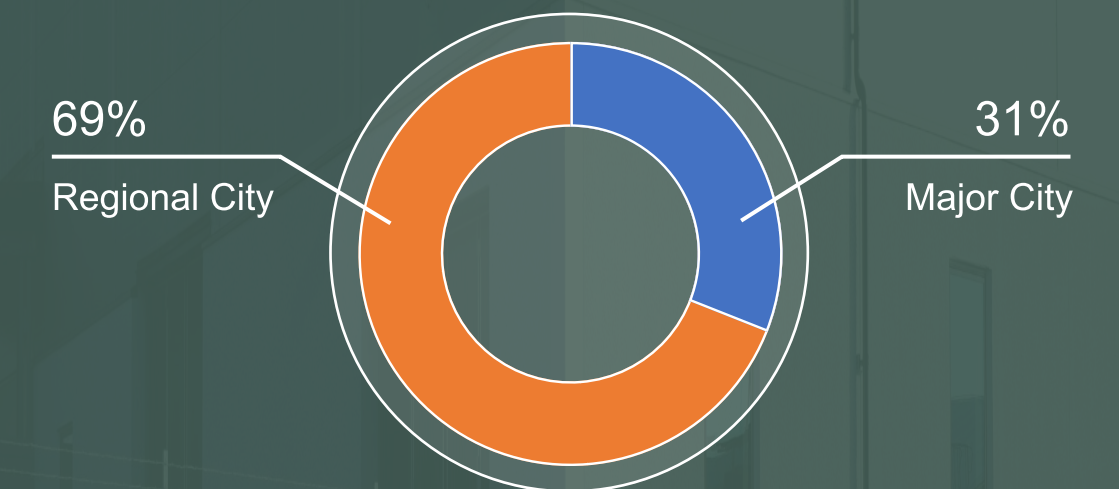
The property portfolio, excluding project properties

	Total	Metropolitan	Regional
Leasable area, m2	269 172	53 274	215 898
Rental value, SEK million	214	66	148
Rental value, SEK/m2	795	1 245	684
Market value, SEK million	2 990	1 008	1 982
Market value, SEK/m2	11 107	18 923	9 178
Occupancy rate, %	99,8	100,0	99,8
Remaining lease period, year	7,9	5,3	9,1
Number of properties	39	15	24

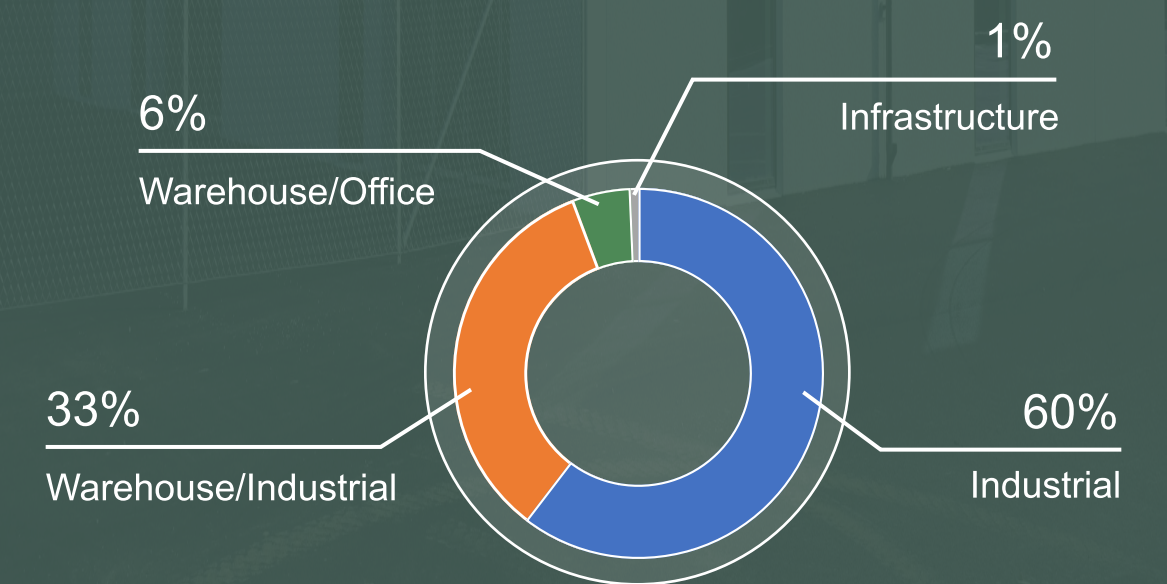
Property Value per Market Area



Rental Value per Market Area



Distribution by Property Type



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Market Value of the Property Portfolio

The Group reports its holdings of investment properties at fair value in accordance with IAS 40. Fair value is based on market valuations. All properties are valued quarterly by an external and independent valuer. The valuation at the closing date of March 31, 2026 is based on market valuation performed by CBRE.

The Group reports the investment properties at fair value in accordance with level 3 of the valuation levels defined in IFRS 13, a valuation model where material input data is based on unobservable data. The fair value assessments are carried out using a combination of the location price method and a return-based method based on discounting of future cash flows for each property, considering the applicable lease terms, market situation, rent levels, operational, maintenance and management administrative costs and the need for investments.

The calculation period is, considering the contract term of each property, normally 10-15 years, and during the calculation period, the income consists of agreed rent levels until the end of the contract period. For the period thereafter, the rental income is calculated at the market rent that applies today. Operating and maintenance costs have been assessed based on the company's actual costs and have been adapted to the condition and age of the properties. For a more detailed description of the Group's valuation principles, see Logistris' Annual Report for 2025.

The weighted yield requirement for the valuation of the property portfolio was 6.6%, where the required rate of return in the valuations, depending on the property category, was in the range of 5.5% to 7.8%. The initial yield requirement in the valuations increased to 6.5% on average. During the period, the reported property yield was 6.6%, adjusted for accumulated project costs in Ludvika.

The market value of the Group's investment properties at the end of the period amounted to SEK 3,395 million (2,941). The properties taken possession of during the period amount to a value of SEK 261 million. Unrealised changes in value attributable to investment properties amounted to SEK 22 million (22) during the period.

	Jan - mar	Jan - mar	Jan - dec
Change in the value of the property portfolio SEK million	2026	2025	2025
Opening fair value	2 941	2 093	2 093
Property acquisitions	368	177	664
Divestments	-155	-	-3
Investments in existing properties	1	2	9
New construction	218	-	78
Unrealised changes in value	22	22	100
Closing fair value	3 395	2 294	2 941

Torngrund's estimated share of the profit will be paid as an earn-out consideration and, at the end of the reporting period, was recognized as a capitalized property acquisition cost and as an other liability of SEK 107 million.

	Jan - mar	Jan - mar	Jan - dec
Changes in the value of properties through profit or loss SEK million	2026	2025	2025
Yield requirement, %	7	-	5
Driftnetto	15	17	60
Other	0	5	35
Unrealised change in value	22	22	100

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Input data for property valuation	Jan - mar	Jan - dec
	2026	2025
Yield requirement, %	6,5	6,5
Income (SEK/sqm)	800	693
Operating costs (NOK/sqm)	49	48
Maintenance costs (SEK/sqm)	28	24
Annual inflation, %	2,00	2,00
Average discount rate, %	8,6	8,6
Average long-term vacancy, %	5,2	5,2

Sensitivity analysis of property valuation

Valuation Parameters	Adoption	Average (SEKm)	
		Jan - mar 2026	Jan - dec 2025
Rental income	+/- 10,00 %	326 / -326	327 / -327
Direct Required rate of return	+/- 0,25 %	-55/59	-55/60
Long-term vacancy rate	+/- 2 ,00 %	-42/42	-44/44





Real Estate Transactions

Completed transactions

Property acquisitions									
Property designation	Tenure form	Tenant	Rental period, year	Occupancy rate	Property value, SEK million	Leasable area m2	Plot area m2	Agreement day	Starting
Ludvika Gonäs 1:178 & 1:181*	Ownership	Hitachi Energy Sweden AB	15,0	100%	1 254	103 000	155 000	2025-10-31	2026-01-29
Vänernborg Stallet 18	Ownership	Wiretronic AB	15,0	100%	130	5 996	15 311	2025-03-03	2026-03-18
Norrtälje Görla 9:25	Ownership	Ahlberg Cameras AB	8,0	100%	45	2 139	5 220	2025-03-03	2026-03-18
Total			14,8		1 429	111 135	175 531		

*Ongoing projects

Property sales									
Property designation	Tenure form	Tenant	Rental period, year	Occupancy rate	Property value, SEK million	Leasable area m2	Plot area m2	Agreement day	Resignation
Botkyrka Apprentice 2	Ownership	2 tenants	2,0	51%	77	4 175	7 032	2025-12-18	2026-01-30
Stockholm Sillö 6	Site leasehold	4 tenants	2,6	100%	62	3 410	4 750	2025-12-18	2026-01-30
Karlstad Västra Torp 1:93	Ownership	Entrack AB	8,8	100%	18	2 090	3 900	2025-12-18	2026-01-26
Total			3,5		157	9 675	15 682		

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Property Development – Ongoing Projects

Ludvika logistics center – 15-year lease agreement with Hitachi Energy

Logistri is working with Torngrund to develop a new logistics centre for Hitachi Energy in Ludvika. Upon completion, the property will comprise approximately 103,000 m² of leasable area and is covered by a 15-year lease agreement with the tenant. The project is progressing according to plan with expected completion in April 2027. When the project is completed, the company's earnings capacity per share is expected to increase significantly. For further information, see current earning capacity on page 4.

Logistri has signed a fixed-price turnkey contract. The indicative investment amounts to SEK 1,108 million, which includes the acquisition of the properties, the contract amount, other project-related costs and estimated costs for external financing in the form of building credits. As of 1 April, the estimated remaining investment amounts to SEK 811 million, corresponding to 73% of the indicative investment. The project is fully financed with own funds and building credits.

During the period, the tenant has placed additional orders that have increased the indicative investment by SEK 13 million, from SEK 1,095 million previously. As compensation for these orders, the parties have agreed on an increased base rent, which means that the estimated annual net operating income will increase to SEK 91 million from the previous SEK 89 million.

The transaction with Torngrund is a so-called forward funding, where the project profit, the difference between the final investment and the agreed property value, is to be calculated upon completion and distributed between the parties according to predetermined terms. Torngrund's share of the project profit will be paid in the form of an earn-out payment. Logistri will pay 10% of the earn-out consideration in cash, while the remainder will be paid with subscription rights, where each subscription right entitles the holder to subscribe for one Class B share at an estimated value of SEK 16.5 per share.

The tenant has the option of acquiring the project from Logistri upon completion. The agreed property value in such an acquisition amount to SEK 1,354 million and will be increased by the cost of additional orders. If the tenant chooses to make use of this opportunity, this must be notified no later than six months before completion. No such notification has been received.

Ongoing projects as of 2025-03-31

Municipality	Fastighet	Type of project	Current phase	Earliest possible end date	Rentable area	Indicative investment, SEK million	Estimated remaining investment SEK million	Estimated Annual Net Operating Income (SEK million)	Occupancy rate
Ludvika	Gonäs 1:181 & 1:178	Logistics / Warehouse	Construction started	Q2 2027	103 000	1 108	811	91	100%

Note:
Includes the cost of land acquisition and financing

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Illustration of new building

Gonäs 1:181 & 1:178



Ongoing erection of the frame



Drone image of the area 23 April 2026



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Financing

Capital structure

At the end of the period, the company's capital structure consisted of 43% (44) equity, 45% (49) interest-bearing liabilities and 12% (7) other items. Logistris' creditors consist of four Nordic banks, where the financing consists of secured bank loans. Bond loans are a complementary source of funding.

Equity

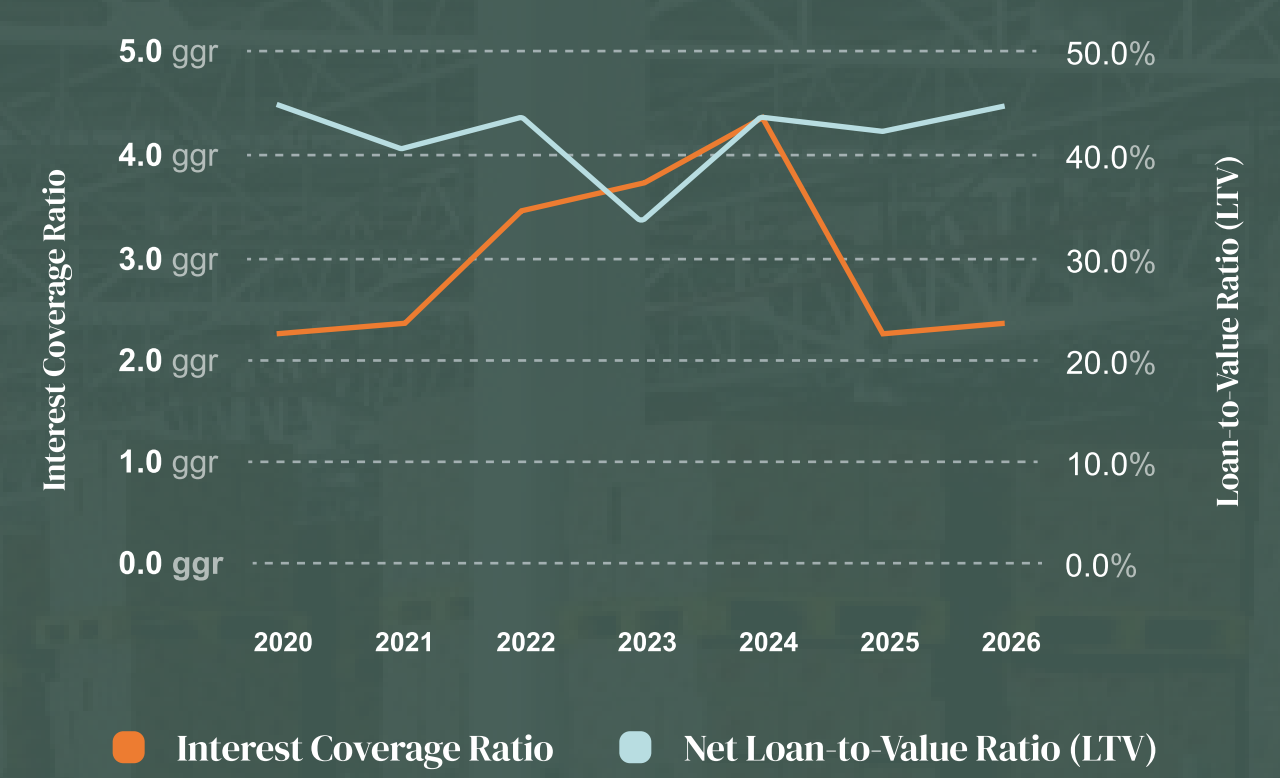
Equity in the Group amounted to SEK 1,545 million (1,496) and increased net by SEK 49 million during the period. The increase was explained by a positive result of SEK 52 million. The dividend was decided to reduce equity by SEK 3 million.

Interest-bearing liabilities

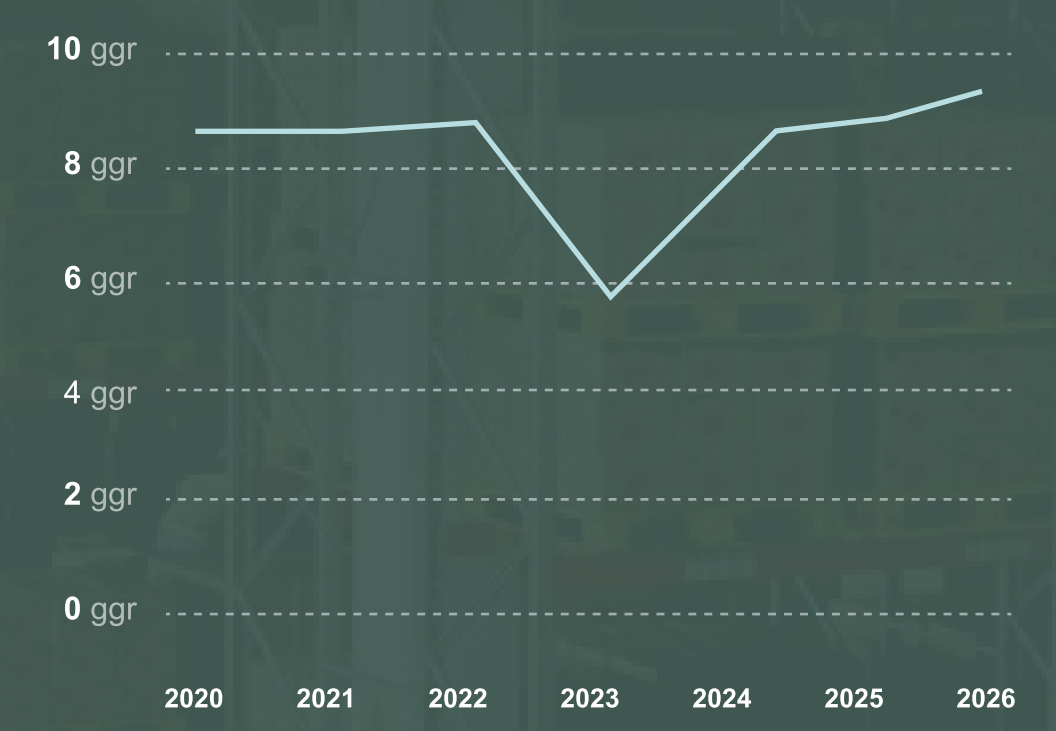
Logistris' interest-bearing liabilities amounted to a nominal value of SEK 1,634 million (1,667) and consisted of bank loans of SEK 1,334 million (1,367) and bond loans of a nominal value of SEK 300 million (300). Of total interest-bearing liabilities, 82% (82) consisted of bank loans and 18% (18) of bond loans. The bond is a senior unsecured green bond within a framework of SEK 600 million in total. The bond is listed on Nasdaq.

KEY FIGURES FINANCING	Jan - mar	Jan - mar	Jan - dec	Apr - mar
	2026	2025	2025	2025/2026
Equity ratio, %	42,7	43,7	44,3	42,7
Loan-to-value (LTV) ratio, %	48,1	54,0	56,7	48,1
Return on equity, %	13,8	11,2	10,6	12,2
Average tied-up capital period, year	2,4	1,8	2,7	2,4
Average fixed interest period, year	2,3	1,8	2,6	2,3
Average loan interest rate at the end of the period, %	4,34	3,94	4,33	4,34
Interest coverage ratio, times	2,4	2,6	2,3	2,3
Net debt, SEK thousand	1 515	1 121	1 272	1 515
Net loan to value	44,6	48,9	43,3	44,6
Debt-to-income ratio, times	8,5	8,5	8,7	8,5

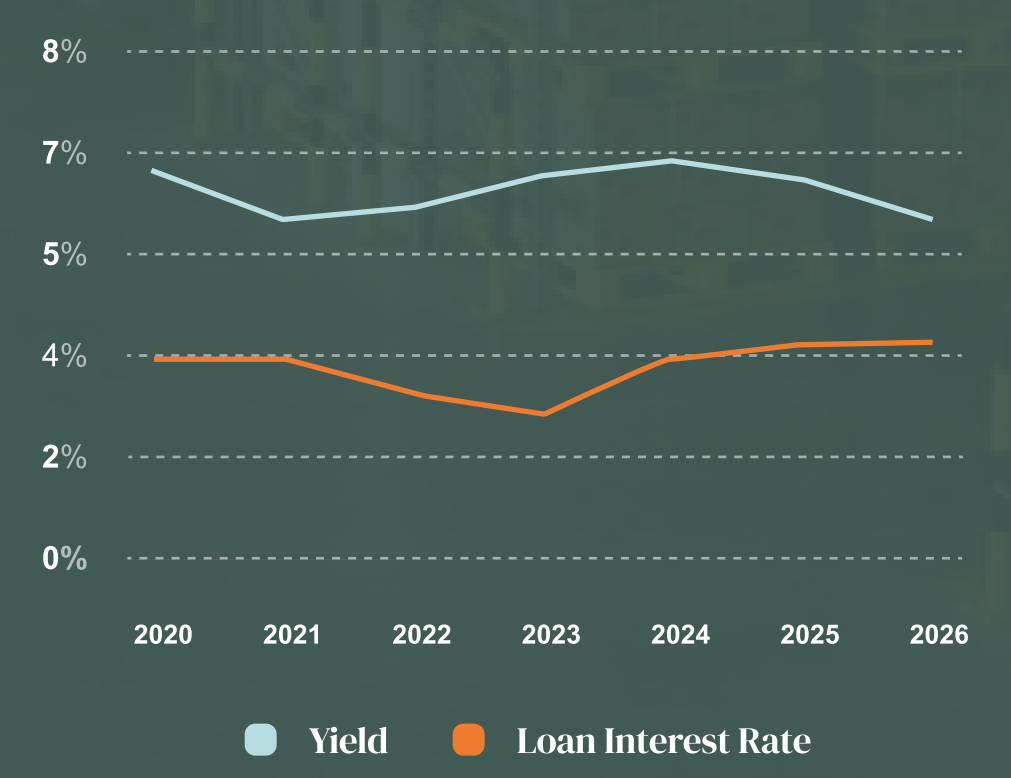
Net Loan-to-Value Ratio and Interest Coverage Ratio



Debt Ratio



Yield and Loan Interest Rate



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Fixed capital and interest rates

For Logistri, the tied-up capital period for interest-bearing liabilities was 2.4 years (2.7), with no maturities in 2026 apart from ongoing contractual amortizations. The average interest rate at the end of the period was 4.34% (4.33) and the average fixed interest period was 2.3 years (2.6). At the end of the period, Logistri had entered into interest rate hedges of a nominal amount of SEK 1,565 million (1,565) and related to interest rate swaps and interest rate corridors. Average remaining maturity of 4.1 years for interest rate swaps and 1.6 years for interest rate corridors.

The balance sheet item, current liabilities to credit institutions, refers to loans maturing within one year. These loans are linked to a legal entity that is planned to be merged in 2026. In connection with the merger, the loans will be restructured and have a tied-up capital in three years. When calculating the tied-up capital, the company has therefore chosen to classify these loans with a tied-up capital of 2.5 years.

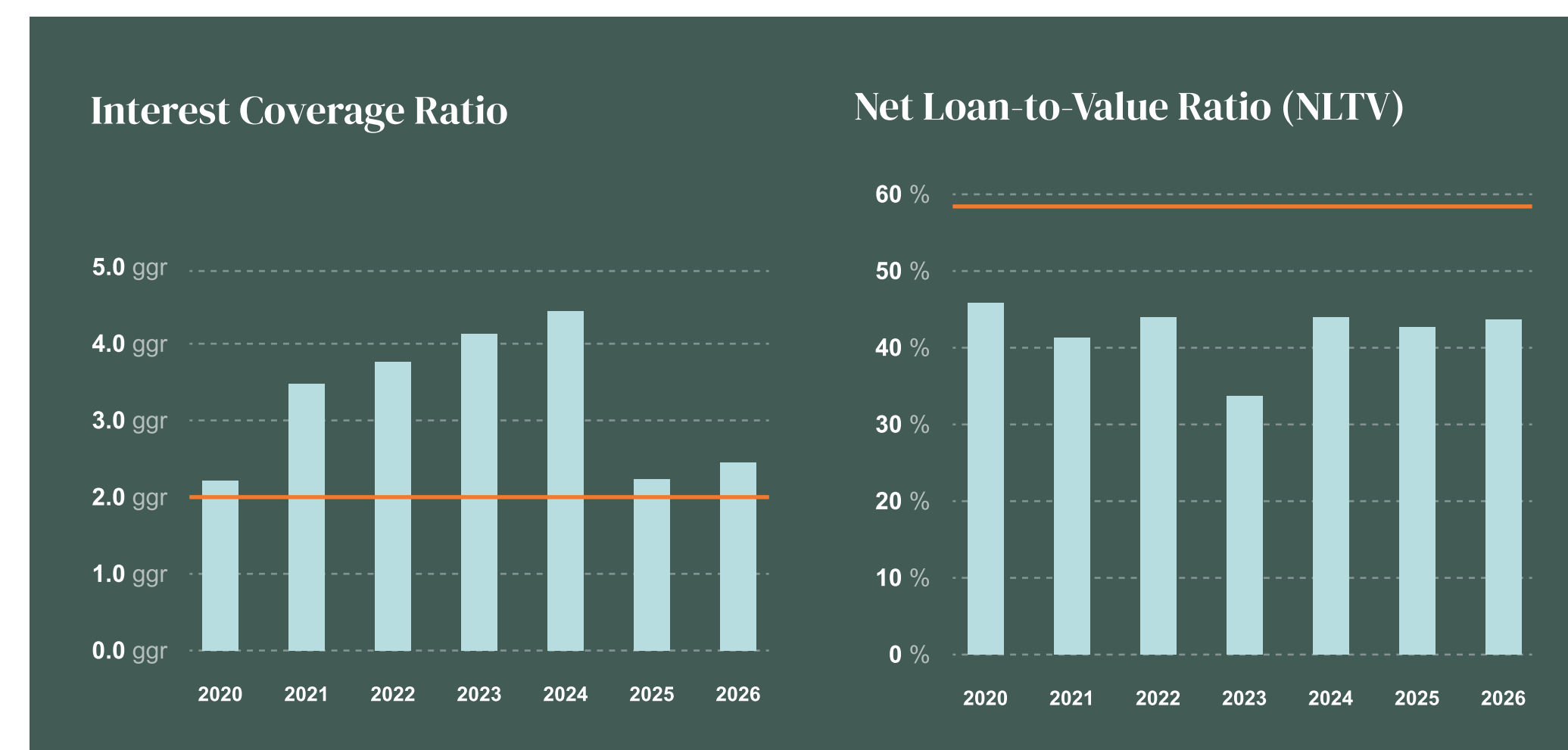
Market value of financial derivatives

The Group's interest rate derivatives are reported at fair value and the change in value is recognised in the income statement. The carrying amount of the Group's derivatives is based on quarterly valuations from the bank counterparty. To determine the fair value of interest rate derivatives, the difference between the fixed interest rate of the derivative and the prevailing market rate is discounted by the corresponding maturity, which means that fair value is determined according to level 2 of IFRS 13. Other financial instruments are reported at amortised cost, where the carrying amount is considered to be a good approximation of fair value. The Parent Company applies IFRS 9 in a legal entity and financial instruments are reported at current market value.

	Jan - mar	Jan - dec
Changes in the value of financial derivatives SEK million	2026	2025
Opening fair value	1	0
Unrealised change in value	16	1
Closing fair value	17	1

Maturity	Tied up in capital			Fixed interest rates		
	Bank loans, SEK million	Bonds, SEK million	Total interest-bearing liabilities, SEK million	Share, %	Fixed interest rates, SEK million	Average interest rate, %
2026	0	0	0	0%	123	3,88%
2027	140	300	440	27%	440	5,65%
2028	827	0	827	51%	723	3,82%
2029	367	0	367	22%	348	3,95%
Total	1 334	300	1 634	100%	1 634	4,34%

Debt portfolio	Amount, SEK million	Average margin, %	Average total interest rate, %	Average amortization, %	Average tied-up capital period, year
Bank loans	1 334	1,54%	3,89%	2,54%	2,61
Bond loan	300	3,90%	6,37%	0%	1,65
Total	1 634	1,97%	4,34%	2,08%	2,43



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Available liquidity

Cash and cash equivalents amounted to SEK 119 million (395). Logistri has a revolving credit facility of SEK 40 million (40), which is unutilised in its entirety at the end of the period. The company's available liquidity thus amounted to SEK 159 million (435) at the end of the period.

Financial policy

Logistris' financial policy aims to ensure proactive and continuous work to ensure that the company has access to long-term equity and borrowed capital at the lowest cost based on desired risk levels, underlying assets and market conditions.

It also aims to minimise risks associated with financing, which is why the following guidelines have been developed

- The net loan-to-value ratio shall over time amount to a maximum of 58%
- Average weighted tied-up capital shall amount to at least 2 years in the long term
- Bonds shall amount to a maximum of 20% of the total loan volume
- Interest rate hedging should amount to 50-100% in 1-3 years' time and 30-70% in 4-5 years' time
- The interest coverage ratio should exceed 2.0 times in the long term

Deviations from the guidelines can be made for periods in order to take advantage of attractive business opportunities, with the long-term aim of fulfilling them.

Derivative	Currency	Nominal amount, SEK million	Interest rate, %	Maturity, year
Interest rate swap	SEK	145	2,37	1,74
Interest rate swap	SEK	50	2,17	2,50
Interest rate swap	SEK	25	2,09	2,50
Interest rate swap	SEK	25	2,09	2,50
Interest rate swap	SEK	100	2,27	3,50
Interest rate swap	SEK	50	2,21	3,50
Interest rate swap	SEK	50	2,21	3,50
Interest rate swap	SEK	100	2,38	3,50
Interest rate swap	SEK	50	2,31	4,50
Interest rate swap	SEK	50	2,31	4,50
Interest rate swap	SEK	100	2,48	5,50
Interest rate swap	SEK	50	2,41	5,50
Interest rate swap	SEK	50	2,41	5,50
Interest rate swap	SEK	100	2,53	6,21
Interest rate swap	SEK	50	2,48	6,24
Interest rate swap	SEK	50	2,49	6,47
Interest rate swap	SEK	110	2,30	3,03
Interest rate swap	SEK	110	2,40	4,03
Total		1 265	2,35	4,06

Derivative	Currency	Nominal amount, SEK million	Interest rate, %	Maturity, year
Cap	SEK	100	3,00	1,64
Floor	SEK	300	2,47	1,64
Cap	SEK	200	3,00	1,64
Total		300	2,74	1,64

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Sustainability Work and ESG

Logistris' business operations shall be conducted in a responsible manner and ESG issues are a central and important part of Logistris' operations and are considered in the company's profitability targets. Logistri shall live up to high expectations for sound and ethically sustainable business operations through governance, transparency and knowledge of laws, regulations and good industry standards. Logistri will work to ensure that the company's environmental impact is as limited as practically possible. This also includes the company's tenants and partners, to the extent that the company can influence them.

The property owners' sustainability work is largely about the energy use in the buildings and in the tenants' operations, especially for those real estate companies that do not have extensive project development activities. Solar cells, LED lighting, operational control, heat pumps and EV systems for vehicles are examples of investments that Logistri discusses on an ongoing basis with affected tenants.

Operational optimization brings benefits for Logistri, its tenants, the environment and leads to long-term improved operating nets. In the long run, it reduces tenants' costs, makes the properties more attractive to new tenants and reduces residual value risk. Over time, the majority of the company's properties will be environmentally certified, and in the case of new construction, buildings will be environmentally certified with at least a level of BREEAM Very Good or equivalent.

Sustainability work during the period

During the period, the work on practical sustainability work has continued with tenant dialogues about possible investments in various energy projects. The work of environmentally certifying several buildings and agreeing on "green" leases is underway as part of the long-term sustainability planning. Overall, the company should priorities the management measures that have a positive effect on the environment and society, while at the same time the measures and investments shall be wise from an administrative financial perspective.



During the period, the following measures have been implemented:

- A solar cell project has been put into operation on the property Botkyrka Skyttbrink 29
- Certification (BREEAM in Use, Very Good or Excellent) is ongoing for several of the company's properties. In connection with certification, climate risk analyses are also carried out.
- Development of the company's ESG platform in accordance with the CSRD is ongoing.
- In 2025, the company has deployed a support system to be able to measure and analyze media consumption from both property-related and production-related consumption. This means better ESG reporting today and smarter collaboration with tenants tomorrow.
- In 2026, it is planned to implement energy declarations for those properties that do not have current declarations. In connection with this, energy audits are carried out.

For further information about the company's sustainability work, please refer to the company's annual report and upcoming reports.

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The Share

Logistri's shares are listed on Stockholm on the Spotlight Stock Market and at the end of the period the company had a total of 1,456 shareholders (1,599). The company has two series of ordinary shares in which the A share holds one vote and the B share one tenth of a vote.

At the end of the period, the number of Class A shares was 7,335,000 and the number of Class B shares was 89,348,334. The total number of shares amounted to 96,683,334 and the number of votes to 16,269,833.

In 2025, a share split was carried out where one existing share was divided into ten shares. All key ratios have been adjusted for this share split

Share information	
Trading venue	Spotlight stock market
Ticker A share (ticker)	LOGIST A
Ticker B share (ticker)	LOGIST B
Closing price of the Class A share	16,00 SEK
Closing price of the B share	14,65 SEK
Market value at the end of the period	1 426,3 SEK million

Dividend 2026

The Annual General Meeting on 22 April 2026 resolved on a dividend of SEK 0.28 per Class A and Class B share, corresponding to a total of SEK 27.1 million. Payment will be made on four different occasions prior to the next Annual General Meeting, and on each occasion SEK 0.07 per share will be paid and a total of SEK 6.8 million. The record dates are 24 April 2026, 30 June 2026, 30 September 2026 and 30 December 2026. The resolved dividend of SEK 27.1 million corresponds to approximately 37% of the Group's profit from property management, less current tax for the 2025 financial year.

The dividend amount is within the range of 30-50% set by the Board of Directors. Logistri continues to see good opportunities to grow with profitable acquisitions, which has justified the dividend being at the lower end of the range.

Shareholders

Shareholders as of March 31, 2026:

Shareholders	Number of Class A shares	Number of B shares	Total number of shares	Share of shares	Share of votes
Henrik Viktorsson with company	1 757 197	21 907 014	23 664 211	24,48%	24,27%
Peter Lindell	746 772	9 370 948	10 117 720	10,46%	10,35%
Mattias Ståhlgren	510 000	5 000 000	5 510 000	5,70%	6,21%
Leomar Invest AB	954 925	4 000 000	4 954 925	5,12%	8,33%
Avanza Pension	266 149	3 662 207	3 928 356	4,06%	3,89%
Nordnet Pensionsförsäkring	67 760	3 806 758	3 874 518	4,01%	2,76%
Patrik von Hacht	13 915	3 251 666	3 265 581	3,38%	2,08%
PriorNilsson Fonder	-	2 844 621	2 844 621	2,94%	1,75%
GADD & Cie S.A.	223 500	2 011 500	2 235 000	2,31%	2,61%
Trygve Eriksson	-	2 000 000	2 000 000	2,07%	1,23%
Ten largest in total	4 540 218	57 854 714	62 394 932	64,54%	63,47%
Others	2 794 782	31 493 620	34 288 402	35,46%	36,53%
Total	7 335 000	89 348 334	96 683 334	100,00%	100,00%

Options Program

The Annual General Meeting on April 22, 2026 resolved to implement a warrant-based incentive program for employees within Logistri through the issue of subscription rights of series 2026/2030. The warrant program includes an issue of a maximum of 550,000 subscription rights entitling one to subscribe for a maximum of 550,000 shares of series B.

Logistri has a total of 3 decided long-term incentive programs for senior executives and other employees. The subscription price of all subscription rights was below the average market price for the period and has therefore not given rise to a dilution effect for the key figure earnings per share.

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Authorization for the Board of Directors to resolve on share issues

The Annual General Meeting on 22 April 2026 resolved to authorize the Board of Directors, with or without deviation from the shareholders' preferential rights, on one or more occasions until the next Annual General Meeting, to resolve to increase the company's share capital through a new issue of not more than 9,668,333 ordinary shares (A, B and D shares). The AGM also resolved to amend the Articles of Association to allow for the issues and introduce a new ordinary share of Class D.

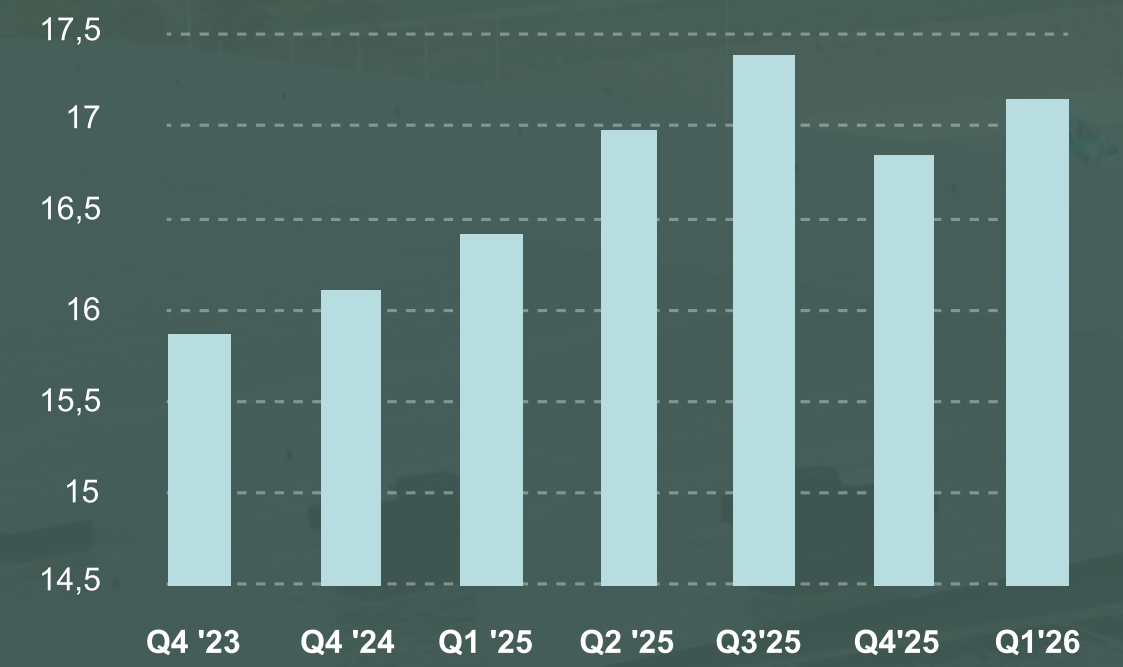
List change

During the third quarter of 2025, Logstri began preparations for a relisting of the company's shares on Nasdaq Stockholm. The intention is that the relisting can be completed no later than the fourth quarter of 2026.

The Board of Directors believes that a change to a larger stock exchange list will increase interest in the share and enable more investors to own Logstri shares.

KPI'S	Jan - mar	Jan - mar	Jan - dec	Apr - mar
	2026	2025	2025	2025/2026
Number of shares outstanding at the end of the period	96 683 334	73 350 000	96 683 334	96 683 334
Average number of shares	96 683 334	73 350 000	78 433 288	84 186 713
Profit from property management per share, SEK	0,25	0,28	1,06	1,04
Earnings per share for the period, SEK	0,54	0,41	1,73	1,87
Equity per share, SEK	15,98	14,40	15,47	15,98
Net asset value per share, SEK	17,41	16,03	17,10	17,41

Net Asset Value per Share, SEK





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Revenue

Income increased by 28.3% to SEK 52.1 million (40.6) as a result of annual indexation and the effect of property acquisitions during the period, as well as the full quarterly effect of acquisitions and renegotiations carried out in 2025.

Property costs

Costs in property management increased to SEK 3.8 million (3.0). Property costs consisted of property management and operations of SEK 1.5 million (1.2), repairs and maintenance of SEK 0.5 million (0.6), insurance of SEK 0.5 million (0.5) and property tax costs of SEK 1.3 million (0.8). Costs for operation and maintenance naturally vary over time and cover a smaller part of the property portfolio, in addition to this, the add-on acquisitions have increased the cost base. Over 99% of the company's total revenue relates to leases, triple net agreements, where the company has no or very low costs for the operation and maintenance of the properties.

Net operating income

Net operating income increased by 28.5% to SEK 48.4 million (37.6). Net operating income in the like-for-like portfolio grew by 2.3%. The surplus ratio was 92.8% (92.6). The surplus ratio varies during the year depending on the seasonal variations that occur in the real estate industry. The average property yield during the period was 5.8% (7.2). Adjusted for the book value of accrued project costs in Ludvika, the average property yield amounts to 6.6%

Administration costs

Administrative expenses increased to SEK 6.7 million (4.5) compared with the same period last year, mainly due to the fact that the company has hired staff and that the property portfolio is growing. Administrative expenses corresponded to 12.9% (11.0%) of the company's revenues at the end of the period, but are expected to represent a reduced share as the portfolio grows and develops. The company has non-recurring costs relating to relisting costs. During March, the company expensed SEK 1.7 million relating to relisting costs.

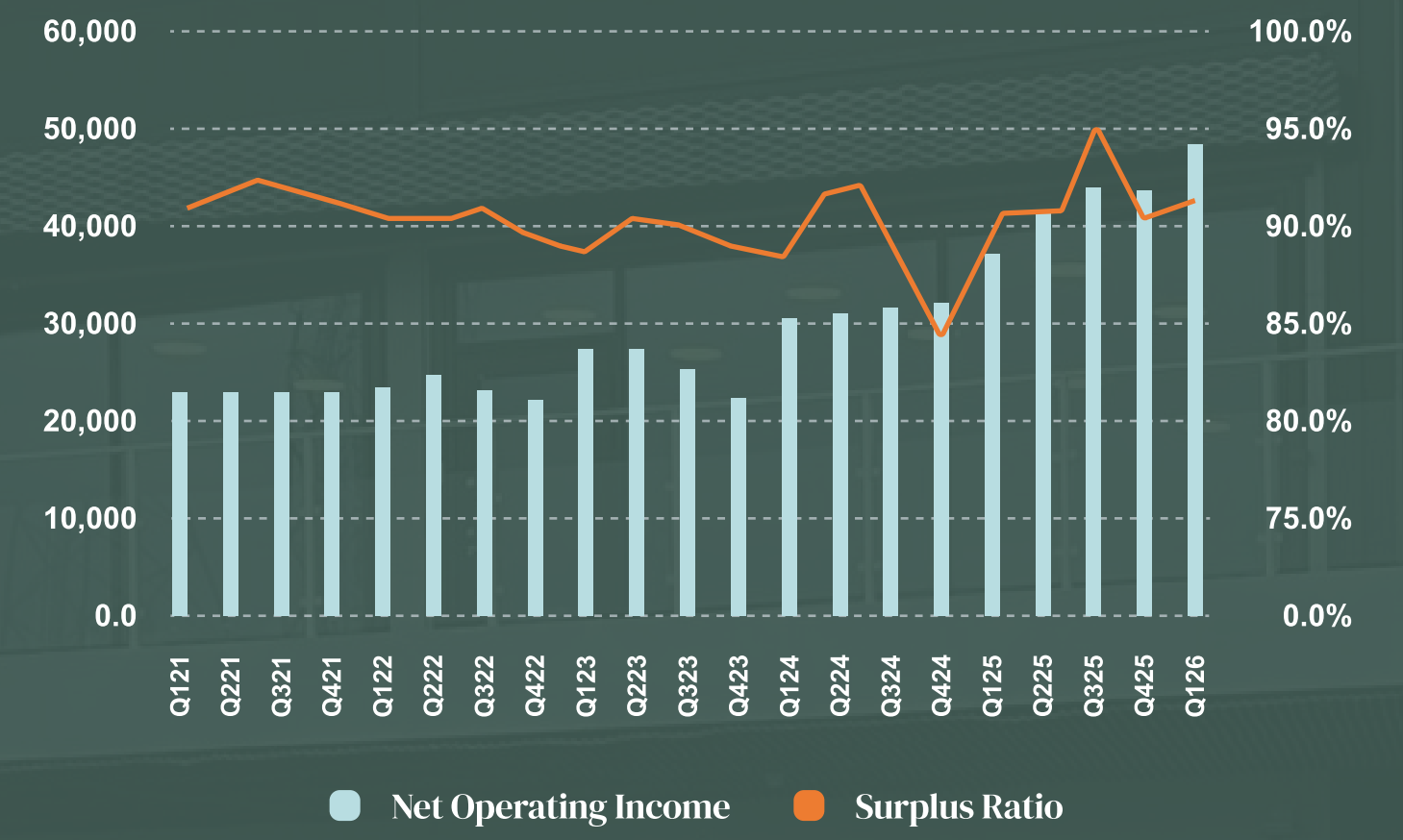
Finance

Financial income is on a par with the previous year of SEK 1.0 million (1.0) and financial expenses amounted to SEK 18.0 million (13.8), which meant that net financial expenses increased to SEK 17.0 million (12.8)

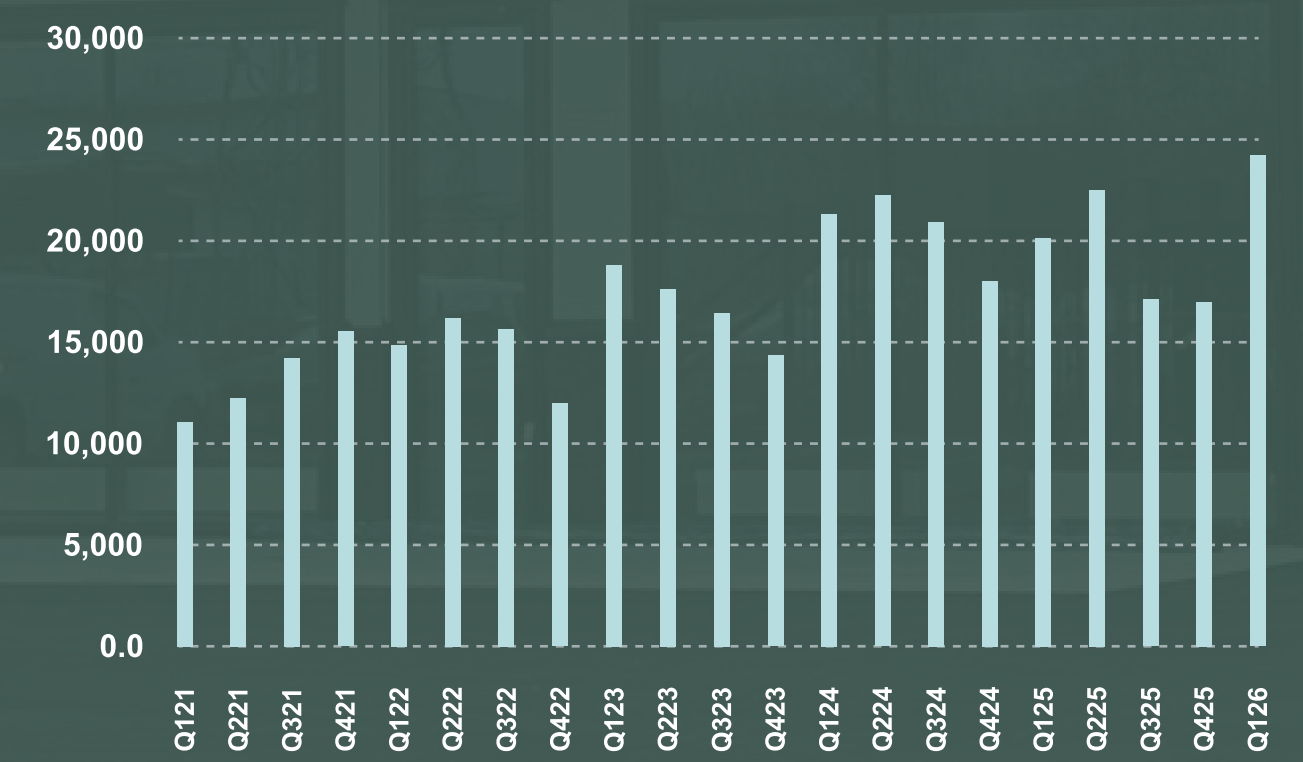
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Net Operating Income and Surplus Ratio



Profit from Property Management



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Profit from property management

Profit from property management increased by 20.6% to SEK 24.5 million (20.3). The increase is mainly due to a higher net operating income. Profit from property management per share amounted to SEK 0.25 (0.28).

Changes in the value of investment properties

Logistris' property portfolio is valued by an external independent valuer at the end of each quarter. Unrealized changes in value amounted to SEK 22.2 million (21.8). The positive change in value is explained by management and acquisition-related activities as well as changing market conditions.

Changes in the value of financial instruments

Unrealized changes in the value of financial instruments amounted to SEK 16.5 million (-0.2). The change in value is mainly explained by higher market interest rates.

Tax

Current tax expense amounted to SEK 2.0 million (2.7) and deferred tax expense amounted to SEK 10.2 million (9.3). The cost of deferred tax is mainly attributable to temporary differences between the carrying amount and the tax value of investment properties.

Cash flow

Cash flow from operating activities amounted to SEK 17.5 million (-2.8). Cash flow from investing activities amounted to SEK -347.1 million (-179.9). Acquisitions amounted to -276.3 (-177.1), investments in the newbuilding project amounted to -217.7 (-) attributable to the Ludvika project. The company also sold properties amounting to SEK 147.4 million (0) during the period. In connection with acquisitions and divestments, the company's cash flow from financing activities has affected cash flow of SEK -47.2 million (-11.4). During the period, cash and cash equivalents decreased by SEK -276.3 million (-194.1) and cash and cash equivalents at the end of the period amounted to SEK 118.7 million (86.3).

Profit for the period

Profit after tax for the period amounted to SEK 52.4 million (30.0), corresponding to SEK 0.54 per share before dilution (0.41) and SEK 0.54 after dilution (0.41).

Parent company's performance and position

The parent company's purpose is to indirectly own shares in property-owning subsidiaries. The Parent Company provides Group management functions in terms of corporate management, finance and property management. The parent company's income consists of re-invoiced costs to subsidiaries. The parent company's costs increased compared to the previous year, which is explained by the Group's growth. Interest income consists of interest received on the parent company's receivables from subsidiaries and deposit interest on cash and cash equivalents. Profit for the period amounted to SEK 3.5 million (-5.4). The increase in profit is mainly explained by unrealised changes in the value of financial derivatives.

At the end of the period, the Parent Company's shares in Group companies amounted to SEK 258.4 million (138.6). The Parent Company's long-term and short-term receivables from Group companies amounted to SEK 487.3 million (541.2) and SEK 627.6 million (128.7) respectively. The Parent Company's current liabilities to Group companies amount to SEK 281.1 million (11.6). The Parent Company's equity amounted to SEK 817.8 million (508.0) at the end of the period, corresponding to an equity/assets ratio of 58.0% (62.1).





Summary of Comprehensive Income Report

Group

	Jan - mar	Jan - mar	Jan - dec	Apr - mar
Amount in thousand SEK	2026	2025	2025	2025 / 2026
Revenue	52 135	40 629	183 825	195 330
Operation and maintenance costs	-2 520	-2 219	-10 852	-11 152
Property tax	-1 257	-776	-4 332	-4 813
Driftnetto	48 358	37 634	168 641	179 365
Administration costs	-6 746	-4 452	-21 854	-24 148
Financial income	1 010	985	3 381	3 406
Financial costs	-18 034	-13 782	-66 970	-71 220
Interest on lease debt	-74	-65	-259	-269
Profit from property management	24 514	20 320	82 939	87 134
Unrealised changes in value, investment properties	22 157	21 834	99 557	99 880
Realised changes in value, investment properties	1 442	-	-	1 442
Unrealised changes in value, financial instruments	16 480	-277	1 153	17 860
Profit before tax	64 593	41 927	183 649	206 316
Current tax	-1 995	-2 679	-9 198	-8 514
Deferred tax	-10 207	-9 293	-39 137	-40 051
Profit for the period**	52 390	29 955	135 314	157 750
Other comprehensive income	-	-	-	-
Total total result**	52 390	29 955	135 314	157 750
Earnings per share* before dilution, SEK	0,54	0,41	1,73	1,87
Earnings per share* after dilution, SEK	0,54	0,41	1,73	1,87
Average number of shares, thousands	96 683	73 350	78 433	84 187

* The key figures for 2025 are adjusted for the share split

** The profit for the period is entirely attributable to the parent company's shareholders.



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Amount in thousand SEK	31 mar 2026	31 mar 2025	31 dec 2025
Assets			
Fixed assets			
Investment properties	3 394 572	2 294 020	2 941 458
Machinery and equipment	318	70	337
Right-of-use assets	3 060	4 919	8 198
Derivative	19 037	-	4 662
Total fixed assets	3 416 987	2 299 009	2 954 655
Current assets			
Rental receivables	71	1 225	1 417
Other current receivables	52 954	75 236	6 191
Deferred expenses and accrued income	32 032	21 133	25 644
Cash and cash equivalents	118 662	86 338	394 962
Total current assets	203 719	183 932	428 214
TOTAL ASSETS	3 620 705	2 482 941	3 382 869

Amount in thousand SEK	31 mar 2026	31 mar 2025	31 dec 2025
Equity and liabilities			
Share capital	9 668	7 335	9 668
Other capital contributed	994 810	654 246	994 810
Retained earnings incl. Profit for the year	540 886	424 311	491 529
Total equity	1 545 364	1 085 892	1 496 007
Long-term liabilities			
Liabilities to credit institutions	1 190 555	909 238	1 225 465
Bond loan	293 527	291 791	293 473
Long-term lease debt	2 379	4 919	8 198
Derivative	1 458	281	3 563
Deferred tax liability	156 679	128 888	158 241
Total long-term liabilities	1 644 598	1 335 117	1 688 940
Current liabilities			
Trade payables	143 482	2 556	5 054
Liabilities to credit institutions	137 584	25 416	134 985
Current tax liabilities	-	2 641	2 694
Other current liabilities	108 274	7 288	13 644
Accrued expenses and deferred income	41 403	24 031	41 545
Total current liabilities	430 743	61 932	197 922
Total liabilities	2 075 341	1 397 049	1 886 862
TOTAL EQUITY AND LIABILITIES	3 620 705	2 482 941	3 382 869



Summary of The Change In Equity

Group

Amount in thousand SEK	Action capital	Other capital contributed	Retained earnings incl. Profit for the year	Total equity
Opening equity 2025-01-01	7 335	654 246	394 356	1 055 937
Comprehensive income				
Profit for the year	-	-	135 314	135 314
Total comprehensive income 2025-12-31	-	-	135 314	135 314
Transactions with shareholders				
Warrants	-	756	-	756
Issue of new shares	2 333	347 667	-	350 000
Issue costs	-	-9 897	-	-9 897
Tax Effect Issue Costs	-	2 039	-	2 039
Dividend	-	-	-38 142	-38 142
Total transactions with shareholders	2 333	340 565	-38 142	304 756
Closing equity 2025-12-31	9 668	994 811	491 528	1 496 007
Opening equity 2026-01-01	9 668	994 811	491 528	1 496 007
Comprehensive income				
Comprehensive income for the period	-	-	52 390	52 390
Total comprehensive income 3/31/2026*	-	-	52 390	52 390
Transactions with shareholders				
Dividend	-	-	-3 033	-3 033
Total transactions with shareholders	-	-	-3 033	-3 033
Closing equity 2026-03-31*	9 668	994 811	540 885	1 545 364

* Equity is entirely attributable to the parent company's shareholders

Cash Flow Statement In Summary

Group

Amount in thousand SEK	Jan - mar	Jan - mar	Jan - dec	Apr - mar
	2026	2025	2025	2025/2026
Cash flow from operating activities				
Profit from property management	24 514	20 320	82 939	87 134
Non-cash items affecting cash flow	1 677	1 500	6 410	6 588
Taxes paid	-8 644	-3 777	-13 556	-18 423
Cash flow from operating activities before changes in working capital	17 546	18 043	75 793	75 299
Cash flow from changes in working capital				
Increase/decrease in rental receivables	1 346	295	3 864	4 915
Increase/decrease in other current receivables	-35 552	-13 462	70 164	48 073
Increase/decrease in accounts payable	138 596	-13 405	-16 557	135 444
Increase/decrease in other current liabilities	-3 929	5 699	-5 607	-15 236
Cash flow from operating activities	100 460	-2 830	127 657	248 496
Investment activities				
Acquisition of investment properties	-276 250	-177 060	-650 222	-749 413
New construction existing properties	-217 727	-	-77 107	-217 727
Investments in existing properties	-573	-2 788	-8 825	-83 716
Divested investment properties	147 407	-	-	147 407
Acquisition of equipment	-	-11	-328	-317
Cash flow from investing activities	-347 143	-179 859	-736 482	-903 766

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Amount in thousand SEK	Jan - mar	Jan - mar	Jan - dec	Apr - mar
	2026	2025	2025	2025/2026
Financing activities				
Warrants	-	-	756	756
Issue of shares	-	-	350 000	350 000
Issue costs	-	-	-9 897	-9 897
Dividend	-12 569	-9 536	-38 142	-41 175
Borrowings	75 350	-	1 230 758	1 306 107
Amortization	-109 045	-1 289	-801 256	-909 012
Set-up costs	-900	-619	-8 903	-9 184
Cash flow from financing operations	-47 164	-11 444	723 316	687 595
Cash flow for the period	-276 300	-194 133	114 491	32 324
Cash and cash equivalents at the beginning of the period	394 962	280 471	280 471	86 338
Cash and cash equivalents at the end of the period	118 662	86 338	394 962	118 662





Summary Of The Income Statement

The Parent Company

Amount in thousand SEK	Jan - mar	Jan - mar	Jan - dec
	2026	2025	2025
Net sales	7 242	1 245	4 705
Administration costs	-8 046	-4 170	-21 157
Operating profit	-804	-2 924	-16 452
Interest income and similar income items	376	3 261	15 482
Financial costs	-7 034	-5 709	-25 219
Profit after financial items	-7 463	-5 372	-26 189
Changes in the value of financial instruments, unrealised	13 887	-	1 214
Group contribution	-	-	26 399
Profit before tax	6 424	-5 372	1 424
Tax for the period	-2 860	-	-2 289
Profit for the period	3 564	-5 372	-865

Balance Sheet In Summary

The Parent Company

Amount in thousand SEK	31 mar 2026	31 mar 2025	31 dec 2025
Assets			
Shares in subsidiaries	258 439	138 567	258 439
Other fixed assets	228	51	242
Long-term receivables of group companies	487 204	541 206	487 205
Derivative	16 560	-	4 662
Total fixed assets	762 431	679 824	750 548
Current receivables of group companies	627 562	128 729	226 110
Other current receivables	3 013	364	2 525
Deferred expenses and accrued income	1 274	1 765	1 074
Cash and bank	14 895	7 751	208 147
Total current assets	646 744	138 608	437 856
TOTAL ASSETS	1 409 175	818 432	1 188 404
EQUITY AND LIABILITIES			
Share capital	9 668	7 335	9 668
Free equity	808 133	500 674	807 603
Equity	817 801	508 009	817 271
Bond loan	293 527	291 791	293 473
Derivative	1 458	-	3 448
Deferred tax liability	3 111	-	250
Long-term liabilities	298 096	291 791	297 171
Trade payables	1 719	54	880
Current liabilities of group companies	281 080	11 561	53 440
Other current liabilities	391	175	9 896
Accrued expenses and deferred income	10 087	6 843	9 746
Total current liabilities	293 278	18 633	73 692
Total liabilities	591 374	310 423	371 133
Right-aligned figures in the table	1 409 175	818 432	1 188 404

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REAL ESTATE	2026	2025	2025	2025/2026
Number of properties, pcs	39	30	40	39
Leasable area, sqm	269 172	219 017	264 257	269 172
Fair value of properties	3 394 572	2 294 020	2 941 458	3 394 572
Fair value of properties, SEK/sqm	12 611	10 474	11 131	12 611
Rental value, SEK thousand	214 007	173 819	200 765	214 007
Rental value, SEK/sqm	795	794	760	795
Remaining lease period, year	7,9	7,2	7,4	7,9
Economic occupancy rate, %	99,8	98,6	98,5	99,8
Occupancy rate, %	99,8	99,2	99,1	99,8
Dividend yield, %	5,8	7,2	6,5	5,8
Surplus rate, %	92,8	92,6	91,7	91,8

	Jan - mar	Jan - mar	Jan - dec	Apr - mar
SHARE-RELATED	2026	2025	2025	2025/2026
Number of shares outstanding at the end of the period	96 683 334	73 350 000	96 683 334	96 683 334
Average number of shares	96 683 334	73 350 000	78 433 288	84 186 713
Profit from property management per share, SEK	0,25	0,28	1,06	1,04
Earnings per share for the period, SEK	0,54	0,41	1,73	1,87
Equity per share, SEK	15,98	14,40	15,47	15,98
Net asset value per share, SEK	17,41	16,03	17,10	17,41

	Jan - mar	Jan - mar	Jan - dec	Apr - mar
FINANCIAL	2026	2025	2025	2025/2026
Equity ratio, %	42,7	43,7	44,3	42,7
Loan-to-value (LTV) ratio, %	48,1	54,0	56,7	48,1
Return on equity, %	13,8	11,2	10,6	12,2
Average tied-up capital period, year	2,4	1,8	2,7	2,4
Average fixed interest period, year	2,3	1,8	2,6	2,3
Average loan interest rate at the end of the period, %	4,34	3,94	4,33	4,34
Interest coverage ratio, times	2,4	2,6	2,3	2,3
Net debt, SEK thousand	1 515 071	1 121 500	1 272 466	1 515 071
Net loan to value	44,6	48,9	43,3	44,6
Debt-to-income ratio, times	8,5	8,5	8,7	8,5

The 2025 key figures are adjusted for share splits

For definitions, see page 29. For reconciliation of key figures, see page 30.



Other Information

Logistri Fastighets AB (publ), with company registration number 559122-8654, is a public limited liability company registered in Sweden with its registered office in Stockholm. The visiting address of the head office is Skeppsbron 26, 111 30 Stockholm and the registered address is Berzelii Park 9, Box 7415, 103 91 Stockholm. The Company's and its subsidiaries' (the "Group") operations include owning, developing and managing properties for warehouse and light industry in Sweden and the Nordic region.

Employees

The Group had eight employees during the period: the company's CEO, CFO, Property Manager, Technical Manager, Business Developer, Group Accounting Manager and two corporate economists. The management agreement with Pareto Business management expired on March 31, 2026.

Related party transactions

Transactions between the company and its subsidiaries, which are related to the company, have taken place regarding interest expenses and interest income on internal loans and the charging of business and property management fees and audits. All internal dealings have been eliminated in the consolidation. Pareto Business Management AB has no ownership or controlling influence but is a related party to Logistri Fastighets AB according to IAS 24, by providing services under Business Management Agreements.

Material risks and uncertainties

Risk for the Group involves the risk of vacancies as a result of tenants' insolvency or termination of existing leases. The Group runs a limited risk associated with operating and maintenance costs as approximately 99% of the properties are leased with triple net agreements where responsibility for ongoing operation and maintenance as well as property tax lies with the tenant and only planned maintenance (load-bearing structure, roof, facades, installations) is the property owner's responsibility. In nine of the Group's properties, tenants are also responsible for planned maintenance.

Real estate and property-related assets are inherently difficult to value due to the particular nature of each property and the fact that it is not necessarily a liquid market. As a result, valuations can be subject to considerable uncertainty. There is no assurance that the calculations resulting from the valuation process will reflect the actual sale price. A recession in the real estate market can significantly affect the value of property. The valuation is based on an estimate of future payments and a discounting of these with regard to a risk-free interest rate and risk premium. All of these factors are therefore projections of the future and are uncertain.

Liquidity risk refers to the risk that the Group will have problems meeting its obligations related to the Group's financial liabilities. The properties are essentially fully leased and thus the company is dependent on the tenant's finances, financial position and ability to pay, as the company's income in its entirety consists of rental income. The company's risk picture is based on the counterparty and the length of the agreement, which results in leases with a short contract length having a different risk picture than leases with longer contract periods.

Financing risk refers to the risk that the Group will not be able to obtain sufficient financing at a reasonable cost. Payment of interest and operating expenses is handled by the Group receiving rent payments on an ongoing basis. Interest rate risk is defined as how the interest rate level affects earnings and cash flow. The Group has very limited interest rate exposure as financing is provided at a fixed rate.

Accounting policies

Logistri Fastighets AB (publ) applies IFRS Accounting Standards as adopted by the EU. This report has been prepared in accordance with IAS 34 Interim Financial Reporting.

The Parent Company's accounts have been prepared in accordance with RFR 2, Accounting for Legal Entities and the Annual Accounts Act.

For the Group and the Parent Company, the same accounting and valuation principles have been applied as in the most recent consolidated financial statements and the Annual Report, see Logistri Fastighets AB's Annual Report 2025, page 43.

The company publishes five reports annually: the half-year report, the year-end report, the annual report and two interim reports.

Auditors review

This interim report has not been reviewed by the company's auditor.

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Return on equity

Return on equity is calculated as profit for the period, converted to 12 months, divided by average equity during the period.

Loan-to-value ratio

Interest-bearing liabilities divided by the carrying amount of investment properties.

Net operating income

Revenue for the period minus operating and maintenance costs and property tax.

Economic occupancy rate

Contracted annual rent in relation to the rental value

EBITDA

Net operating income reduced by costs for central administration

Property property yield

Net operating income for the period restated to 12 months, adjusted for the properties' holding period during the period in relation to the market value of the properties at the end of the period

Profit from property management per share

Profit from property management divided by weighted average number of shares during the period.

Rental value

Contracted annual rent that runs immediately after the end of the period with a supplement for the assessed market rent for any vacant premises

Net loan to value

Net debt divided by the market value of the properties

Net debt

Interest-bearing liabilities decreased by reported cash and cash equivalents accounted for in current receivables.

Earnings per share

Profit for the period divided by average number of shares

Interest coverage ratio

Profit from property management plus net financial items divided by net financial items

Debt-to-income ratio

Net debt divided by net operating income less administrative expenses ("EBITDA"), according to earning capacity.

Equity ratio

Equity divided by the balance sheet total

Net asset value

Reported equity attributable to parent company shareholders with reversal of provisions for interest rate derivatives and deferred tax.

Net asset value per share

Reported equity attributable to the parent company's shareholders with reversal of provisions for interest rate derivatives and deferred tax, in relation to the average number of shares at the end of the period.

Remaining rental period

the weighted average remaining term of the leases;

Surplus ratio

Net operating income divided by total revenue

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Group

	Jan - mar	Jan - mar	Jan - dec
	2026	2025	2025
Return on Equity			
Profit for the Period	52 390	29 955	135 314
Adjustment for annualisation	157 173	89 865	
Average Equity	1 520 685	1 069 821	1 275 972
Return on equity, %	13,8	11,2	10,6
Loan-to-value ratio			
Borrowing	1 633 733	1 239 025	1 667 428
Property value	3 394 572	2 294 020	2 941 458
Loan-to-value (LTV) ratio, %	48,1	54,0	56,7
Economic Occupancy Rate			
Contracted annual rent	214 436	156 223	197 675
Rental Value	214 007	158 842	200 765
Economic Occupancy Rate, %	99,8	98,6	98,5

	Jan - mar	Jan - mar	Jan - dec
	2026	2025	2025
Dividend yield			
Net operating income	48 358	150 536	168 641
Holdings adjustment, acquisitions	2 742	13 551	22 345
Net operating income, adjusted	196 174	164 087	190 986
Property value	3 394 572	2 294 020	2 941 458
Dividend yield, %	5,8	7,2	6,5
Profit from property management per share			
Profit from property management	24 514	20 320	82 939
Average number of shares	96 683 334	73 350 000	78 433 288
Profit from property management per share, SEK	0,25	0,28	1,06
Long-term net asset value			
Equity	1 545 364	1 085 892	1 496 007
Derivative	-19 037	-	-1 099
Deferred tax	156 679	128 888	158 241
Long-term net asset value, SEK thousand	1 683 005	1 214 780	1 653 149

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	Jan - mar	Jan - mar	Jan - dec
	2026	2025	2025
Long-term net asset value per share			
Long-term net asset value	1 683 005	1 214 780	1 653 149
Number of shares	96 683 334	73 350 000	96 683 334
Net asset value per share, SEK	17,41	16,56	17,10
Net debt			
Borrowing	1 633 733	1 239 025	1 667 428
Cash and cash equivalents	-118 662	-86 338	-394 962
Deposited funds	-	29 898	-
Net debt, SEK thousand	1 515 071	1 122 789	1 272 466
Net loan to value			
Net debt	1 515 071	1 122 789	1 272 466
Property value	3 394 572	2 294 020	2 941 458
Net loan to value, %	44,6	48,9	43,3
Earnings per share			
Profit for the period	52 390	29 955	135 314
Average number of shares	96 683 334	73 350 000	78 433 000
Earnings per share for the period, SEK	0,54	0,41	1,73
Interest coverage ratio			
Profit from property management	41 612	33 221	146 787
Finance	17 098	12 901	63 848
Interest coverage ratio, times	2,4	2,6	2,3

	Jan - mar	Jan - mar	Jan - dec
	2026	2025	2025
Debt-to-income ratio			
Net debt	1 515 071	1 122 789	1 272 466
EBITDA	178 293	132 093	146 787
Debt-to-income ratio, times	8,5	8,5	8,7
Equity ratio			
Equity	1 545 364	1 085 892	1 496 007
Balance sheet total	3 620 705	2 482 941	3 379 306
Equity ratio, %	42,7	43,7	44,3
Surplus ratio			
Net operating income	48 358	37 634	168 641
Total rental income	52 135	40 629	183 825
Surplus rate, %	92,8	92,6	91,7
Equity per Share			
Equity per Share	1 545 364	1 085 892	1 496 007
Number of Shares	96 683 334	73 350 000	96 683 334
Equity per Share, SEK	15,98	14,80	15,47



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→ **Certification of the Board of Directors**

Certification of the Board of Directors

The Board of Directors and the President and CEO ensure that the financial statements report provides a fair overview of the company and the Group's operations, position and results and describes the significant risks and uncertainties faced by the company and the companies in the Group.

This year-end report for Logistri Fastighets AB (publ) was approved by the Board of Directors on May 13, 2026

Stockholm, May 13, 2026

Logistri Fastighets AB
Org.nr: **559122-8654**

Henrik Viktorsson Chairman of the Board	Patrik von Hacht Board Member	Johanna Bjärnemyr Board Member
Mattias Ståhlgren Board Member	Robin Englén Board Member	Cecilia Ekeblom Board Member

David Träff
CEO

Information about MAR

The information in this year-end report is information that Logistri Fastighets AB (publ) is obliged to make public pursuant to the EU Market Abuse Regulation. The information was submitted for publication, through the agency of the contact person, on May 13, 2026.

Upcoming reporting opportunities

- 20 august, 2026 Interim Report Q2 2026
- 12 november 2026 Interim Report Q3 2026

Upcoming dividends

SEK per Share	Ex-dividend Date	Payment
0,07	2026-06-29	2026-07-03
0,07	2026-09-29	2026-10-05
0,07	2026-12-29	2027-01-07



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