Interim Report
Q2 2026

dura

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About Dura Group

Dura Group is a Swedish full-service provider focused on maintaining and improving the durability of properties. Our subsidiaries extend the lifespan of buildings and enhance indoor environments through smart maintenance, renovation, and energy-efficient solutions. Guided by our mission Making Buildings Last Longer, we help property owners optimise resource efficiency, reduce climate impact, and secure the long-term value that comes from well-maintained assets.

Our vision is to become the leading provider of essential property services for homeowners in the Nordic region.

Our group consists of ten subsidiaries, each with a strong market position and high customer satisfaction within its respective niche.

The Quarter in Review

Dura delivers growth in the second quarter, increasing revenue by 45 %.

Our companies

Solar Energy Group and BIAB Entreprenad, acquired during the first quarter , are now fully integrated and broaden the Group's service offering and geographic footprint.

Acquisition of KTV Group finalised during the quarter, marking Dura's entrance to the Norwegian market. Continued strong demand for the Group's services, especially within roof maintenance.

Q2 2026

- Net sales amounted to 296.5 MSEK (204.8) for the second quarter.
- Operating profit (EBIT) amounted to 31.5 (36) MSEK.
- EBITDA amounted to 42.1 MSEK (40.5), corresponding to a margin of 14 % (20).
- One-time expense for professional fees affected EBIT by -9 MSEK
- Profit before tax amounted to 18.8 MSEK (28.3).

January - June 2026

Net sales amounted to 432.9 MSEK (277.3) for the first half of 2026.

Operating profit (EBIT) amounted to 2.3 (29) MSEK for the period.

EBITDA amounted to 26.8 MSEK (36.5), corresponding to a margin of 6 % (13), affected by professional fees and exceptionally harsh weather conditions during the first quarter.

Profit before tax amounted to -9.2 MSEK (11.4)

Amounts in MSEK	APR-JUN 2026	APR-JUN 2025	JAN-JUN 2026	JAN-JUN 2025
Net sales	296.5	204.8	432.9	277.3
Operating profit (EBIT)	31.5	36.0	2.3	29.0
EBIT-margin	11%	18%	1%	10%
Profit (loss) from continuing operations	14.0	23.7	-13.8	7.0
EBITDA	42.1	40.5	26.8	36.5
EBITDA-margin	14%	20%	6%	13%
Net debt	328.3	215.8	328.3	215.8

CEO´s comments

Dura continued to grow during the quarter. Net revenue amounted to 296.5 MSEK (204.8) and EBIT to 31.5 MSEK (36.0). The Group's reported profitability in Q2 was negatively affected by one-time professional fees of 9 MSEK, primarily related to strategy consulting. On a pro forma, rolling twelve-month basis, net sales increased by 23% compared to the same period last year, to 972.2 MSEK (787.9), while adjusted EBITDA increased to 123.2 MSEK (95.7). Our net leverage ratio stood at 2.87x at the end of the quarter, giving us comfortable headroom to our covenants and continued flexibility to pursue our acquisition strategy.

The second quarter was one of execution. Good weather provided ideal conditions for our roof maintenance offerings and improved production efficiency across our other services, and we saw solid demand across both our residential and commercial customer segments. We continued to strengthen delivery effectiveness across the Group, driving customer satisfaction and improving margins, and our group-wide sales initiatives are already showing positive effects. We are also seeing the benefits of our decentralized operating model combined with group-wide best-practice sharing – local entrepreneurship paired with the scale advantages of being part of a larger group.

None of this would be possible without the dedication of our employees across the Group. Their commitment to quality, safety and customer service every day is what ultimately drives our results, and we want to extend our thanks to all of them for another strong quarter.

During the quarter, we worked on integrating our latest acquisitions, Solar Energy Group and BIAB Entreprenad, both completed in Q1, with a focus on realizing synergies and onboarding them to group-wide platforms. Integration work is progressing according to plan, and we are already seeing early signs of the commercial and operational synergies we identified during due diligence. In late May, we welcomed KTV Group AS to Dura, marking our entry into the Norwegian market – a significant milestone for the Group and an important step in our expansion strategy. We look forward to supporting their continued growth as part of the Dura family.

Looking at the broader market, demand for professional, sustainability-focused property maintenance services remains resilient, supported by an ageing housing stock and an increased focus on sustainability and energy efficiency. We believe Dura is well positioned to benefit from these long-term trends given our scale, our broad service offering and our track record as a consolidator in a still-fragmented market.

For the second half of the year, our focus remains on strengthening operational excellence across the Group – in customer satisfaction, quality of work and sales. Our acquisition pipeline remains active, and we continue to evaluate promising candidates in Sweden and abroad within sustainable and critical property maintenance.

We look forward to partnering with more driven entrepreneurs and continuing to expand our service offering and our geographic reach.

Niclas Winberg
CEO

Management Report

Significant Events During and After the Quarter

On May 18th, the Group's subsidiaries LA Takvård, Decatak and Isolerab signed revolving credit facilities (RCF) of 10 MSEK each (total 30 MSEK) with Swedbank. The RCFs carry a spread of O/N STIBOR of 3 per cent and a fixed fee of 1 per cent per annum. The RCFs will strengthen the Group's financial flexibility and stimulate further sustainable growth.

On May 22nd, Dura finalized the acquisition of KTV Group AS. Based in Bergen, Norway, it is the Group's first acquisition outside of Sweden. KTV is a market leader in roof and facade wash among other real estate maintenance services and it is a leader in the application of drone technology.

Market Development

The underlying market for the Group's services is supported by structural drivers, including:

- An ageing housing stock combined with low levels of new construction
- Regulatory requirements and cost incentives promoting energy-efficient housing
- Government subsidies supporting investments in property maintenance and energy efficiency

The Group annually performs services for approximately 15,000 single-family homes, representing a small share of the total addressable market of approximately 2.2 million single-family homes in Sweden. Dura focuses on critical property maintenance services. Roofing and indoor climate solutions are prioritised expenditures for homeowners, and demand for these services has historically proven resilient during periods of macroeconomic uncertainty.

Organisation

The organisation during the second quarter is focused on execution as the weather conditions are more stable for roofing activities. Dura's organisation is continually optimized to stimulate further growth, seamless execution and high customer satisfaction.

Expected Future Development

Demand remains stable and supported by long-term structural factors. The Group intends to continue expanding its market share through selective acquisitions of market-leading companies in Sweden and abroad, alongside continued organic growth driven by investments in sales and operational infrastructure.

Strong order backlog at the end of the quarter indicates continued strong demand as the second half of the roofing season begins.

Management Report

Significant Risks and Uncertainties

Risk management is an integral part of the Group's operations. The objective is not to eliminate risk, but to ensure that risks are identified, evaluated and managed in a structured and disciplined manner. The Board of Directors has overall responsibility for risk oversight at Group level, while executive management regularly evaluates the Group's risk profile and implements mitigating actions where appropriate.

The principal risks and uncertainties are described in the Group's prospectus published in December 2025. Based on the period covered by this interim report, the Board of Directors and management assess that these risks remain relevant and that no new material risks have arisen.

Seasonality

Roof painting and other roof maintenance are weather-sensitive activities and create a seasonality in the Group's revenue and profitability. Roof renovation and drainage are also more challenging in colder weather which decreases production efficiency. The most active quarters during the year are the second and the third as they coincide with roofing season. Very harsh winter conditions in Sweden during the first quarter has had a negative impact on the Group's financial results when comparing 2026 to the prior year.

Shareholders and Share Capital

As of June 30th, 2026, the parent company has 500,000 shares issued, each with a quota value of SEK 1. All shares carry equal rights to dividends and the company's assets. Dura Holdco AB (reg. no. 559485-8945) holds 100 percent of the shares in the parent company.

Personnel

The average number of employees during the quarter was 396 (241).

Sustainability

Sustainability is integrated into Dura's business model, with services that extend the lifespan of buildings and improve energy efficiency, thereby reducing climate impact. We continue to focus on reducing carbon intensity and strengthening governance and supply chain standards. The Group's 2025 Sustainability Report can be found at www.duragroup.se/en/sustainability.

Audit Review

This interim report has not been reviewed by the Group's auditors.

Financial calendar

All reports and press releases for the Group are published on: www.duragroup.se/investerare

2026 — 2027

Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug

31 August
Interim Report Q2

30 November
Interim Report Q3

26 February
Interim Report Q4

30 April
Consolidated Annual Report 2026

31 May
Interim Report Q1

31 August
Interim Report Q2

Financial Overview for the Quarter

Net Revenue
The Group's net sales for the quarter amounted to 296.5 MSEK (204.8). The increase in revenue is mainly related to the acquisitions completed during the first half of the year.

Other operating income amounted to 0.5 MSEK (0.5).

Operating Expenses
Operating expenses for the second quarter amounted to -265.2 MSEK (-169.1). The increase reflects the increased scope of the Group's operations compared to the prior year, with several new subsidiaries and an expanded geographic presence which have led to increased costs for personnel and premises. One-time expenses for professional fees amounting to 9 MSEK are included in administrative expenses for the quarter.

Depreciation and amortisation is included in operating expenses and amounts to -10.6 MSEK (-4.5). The increase is related to depreciation of fixed assets and right-of-use assets reflecting the expansion of the Group compared to the prior year.

Operating Profit (EBIT)
Operating profit (EBIT) amounted to 31.5 MSEK (36.0) with an EBIT-margin of 10.6 % (17.6). EBIT was negatively affected by one-time expenses for professional fees of 9 MSEK during the quarter.

The Group's EBITDA amounted to 42.1 MSEK (40.5) for the second quarter. EBITDA was affected by professional fees of 9 MSEK incurred during the quarter.

Net Financial Items
Net financial items amounted to -12.6 MSEK (-7.8) for the period of which the majority is attributable to bond interest of -10.9 MSEK (-9.6) due to the increase of the outstanding bond loan following the Group's tap issue during the first quarter.

Income Taxes
Income tax expense for the period amounted to -4.8 MSEK (-4.5) driven by an increase in taxable income. The Group's tax is affected by interest rate deduction limitations and other non-deductible expenses and therefore deviates from the statutory tax rate.

Profit (loss) for the Quarter
Profit (loss) attributable to owners of the parent for the quarter was 14.0 MSEK (23.7).

Cash Flow
Cash flow from operating activities amounted to -1.8 MSEK (9.2), with changes in working capital contributing -20.6 MSEK (-24.3). The main driver of the decrease was an increase in paid income tax driven by temporary effects. Increase in working capital led to a cash outflow of -20.6 MSEK (-24.3) during the quarter attributable to seasonal effects where Q2 and Q3 are the Group's most active quarters.

Cash flow from investment activities amounted to -36.3 MSEK (-29.9). The Group's cash flow from investing activities for the quarter pertains primarily to the acquisition of KTV Group, finalized in May.

Cash flow from financing activities amounted to -7.3 MSEK (-3.2) related to repayments of lease liabilities.

Financial Overview for the Year

Net Revenue
Net revenue for the first half of 2026 amounted to 432.9 MSEK (277.3) driven by three acquisitions completed since the close of the financial year of 2025 and organic growth in the Group's roof maintenance offering.

Other operating income amounted to 0.6 MSEK (0.6).

Operating Expenses
Operating expenses for the six months ended 30 June 2026 amounted to -430.9 MSEK (-248.8). The increase in operating expenses is mainly due to the acquisitions completed during the year as well as the incremental expansion of the Group during 2026 and the latter half of 2025. Operating expenses in the second quarter were affected by a one-time expense of 9 MSEK for professional services related to strategy and other consulting.

Depreciation and amortisation is included in operating expenses and amounts to -24.5 MSEK (-7.5). The increase is mainly related to a one-time effect of -10 MSEK connected to the purchase price allocation (PPA) for Solar Energy Group which was acquired in January 2026. Depreciation has also increased for right-of-use assets and other intangible assets compared to the same period 2025.

Operating Profit (EBIT)
Operating profit (EBIT) amounted to 2.3 MSEK (29.0) with an EBIT-margin of 0.5 % (10.4). The decrease in operating profit is driven in large part by the one-time depreciation and professional fees outlined in Operating Expenses (-19 MSEK) as well as the harsh weather conditions in the beginning of the year which decreased production efficiency during the first quarter. The Group has also incurred costs in expanding its central organisation as well as key positions in subsidiaries.

The Group's EBITDA amounted to 26.8 MSEK (36.5) for the first half of 2026 with the above-mentioned professional fees as the primary driver for the decrease.

Net Financial Items
Net financial items amounted to -11.5 MSEK (-17.6) for the first six months of 2026. The main driver of the increase in net financial items is a revaluation of contingent consideration which had a positive effect of 10.9 MSEK. Adjusted for the revaluation, the Group had net financial items of -22.4 MSEK mainly attributable to bond interest and interest on leasing liabilities.

Income Taxes
Income tax expense for the period amounted to -4.6 MSEK (-4.4) driven by an increase in taxable income. The Group's tax is affected by interest rate deduction limitations and other non-deductible expenses and therefore deviates from the statutory tax rate.

Profit (loss) for the Period
Profit (loss) attributable to owners of the parent was -13.8 MSEK (7.0).

Cash Flow
Cash flow from operating activities amounted to -58.6 MSEK (-25.2) with changes in working capital contributing with -44.4 MSEK (-36 MSEK). The decrease in cash flow from changes in working capital is partly caused by customer pre-payments before year-end related to lower renovation deductions in 2026. For work that was to be completed before the end of January 2026, the higher deduction was allowed if the customer paid before the final day of 2025, leading to a higher operating cash flow in Q4 and the reverse effect in 2026. Operating cash flow is further affected by temporary income tax effects and long processing times for "green" tax deductions (batteries and solar).

Cash flow from investment activities amounted to -76.4 MSEK (-143.0). The Group's cash flow from investment activities pertains primarily to acquisitions of subsidiaries in 2026.

Cash flow from financing activities amounted to 49.9 MSEK (-67.7 MSEK). The positive cash flow for the period is a result of the Group's tap issue in March and sale of bonds held on the balance sheet which in total resulted in a cash inflow of 59.6 MSEK counteracted mainly by repayment of lease liabilities.

Financial Position and Capital Structure

About Dura's Senior Secured Bond
Dura Sverige AB (publ) has issued a senior secured bond of 350 MSEK outstanding under a total framework of 500 MSEK (the "Bond"). The net proceeds were used to refinance existing indebtedness and to support the continued expansion of the Group through strategic acquisitions. The Bond, issued on 30 December 2024 has a maturity date of 30 June 2028 and carries a spread of 850 basis points on STIBOR3M.

The Bond was admitted to trading on the Frankfurt Open Market on 10 January 2025 and subsequently on Nasdaq Stockholm First North Bond Market on 19 December 2025.

No outstanding bonds are held by Dura Sverige AB (publ) as of the balance sheet date.

Based on the current capital structure and bond terms, the Group is currently contemplating refinancing the Bond.

Net Interest Bearing Debt
Total interest-bearing debt as of June 30th, 2026 amounted to 338.1 MSEK (288), comprising bond debt of 333.3 MSEK (283.7) and other financing arrangements of 4.9 MSEK (4.3).

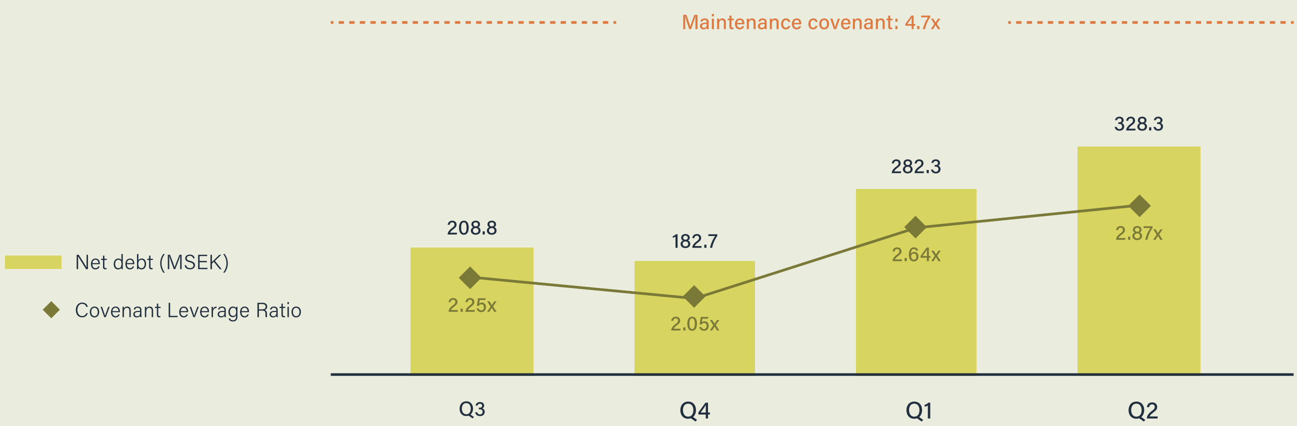
Cash and cash equivalents amounted to 9.8 MSEK (72.2) as of June 30th, 2026. The decrease in cash balances is primarily related to acquisitions finalized during H1. Net interest-bearing debt amounted to 328.3 (215.8) MSEK.

Covenants
The bond includes an incurrence covenant of 3.25x and a maintenance covenant of 4.7x net interest bearing debt to adjusted EBITDA. For covenant purposes, net interest bearing debt and Adjusted EBITDA are calculated in accordance with the accounting principles in force at the first issue date of the bond, when the Group prepared its financial statements in accordance with BFNAR 2012:1 (K3). The difference in accounting principles compared to those applied in the remainder of this report relate primarily to accounting for leases and transaction costs. Adjusted EBITDA is calculated on a rolling twelve-month pro forma basis and includes adjustments for transaction costs and other items affecting comparability. Adjustments for items affecting comparability are capped at 10 % of EBITDA.

Pro forma Revenue and Adjusted EBITDA
Pro forma revenue and adjusted EBITDA for the twelve months ended June 30th, 2026 amounted to 972.2 MSEK (787.9) and 123.2 MSEK (95.7) respectively and 114.2 MSEK (84.7) including the 10 % cap on adjustments.

Pro forma figures are calculated as if all current group companies were owned during the entire comparative period and in accordance with the accounting principles described in the section "Covenants". Note that in the image below showing earlier covenant reporting, only companies owned on each respective reporting date are included pro forma for that quarter.

At 2.87x for the period ended June 30th, 2026, the Group has headroom to both covenant levels. The Group has been compliant with the maintenance covenant since the bond issuance.



Condensed Consolidated Statement of Comprehensive Income

Amounts in KSEK	Note	2026-04-01 - 2026-06-30	2025-04-01 - 2025-06-30	2026-01-01 - 2026-06-30	2025-01-01 - 2025-06-30
Revenue	4	296 513	204 802	432 948	277 348
Cost of sales		-174 726	-122 558	-259 525	-167 444
Gross profit		**121 787**	**82 244**	**173 423**	**109 904**
Selling expenses		-45 138	-24 460	-87 818	-43 080
Administrative expenses		-45 359	-22 040	-83 583	-38 287
Other operating income		479	451	638	618
Other operating expenses		-310	-154	-384	-183
Operating profit		**31 459**	**36 041**	**2 276**	**28 972**
Finance income		23	2 619	1 507	2 956
Revaluation of contingent consideration		-	-	10 922	-
Finance costs		-12 663	-10 402	-23 897	-20 538
Net financial items		**-12 640**	**-7 783**	**-11 467**	**-17 582**
Profit before tax		**18 820**	**28 258**	**-9 191**	**11 390**
Income tax expense		-4 826	-4 531	-4 645	-4 419
Profit (loss) attributable to owners of the parent		**13 994**	**23 727**	**-13 836**	**6 971**
Other comprehensive income (OCI) *Items that may be reclassified subsequently to profit or loss*					
Exchange differences on translation of foreign operations		-747	23	-746	37
Other comprehensive income for the quarter, net of tax		**-747**	**23**	**-746**	**37**
Total comprehensive income for the quarter		**13 247**	**23 750**	**-14 582**	**7 008**
Earnings per share, profit (loss) (KSEK)					
Profit (loss) attributable to owners of the parent		0.03	0.05	-0.03	0.01

Condensed Consolidated Statement of Financial Position

Amounts in KSEK	Note	2026-06-30	2025-06-30
ASSETS			
Fixed Assets			
Intangible assets			
Goodwill	6	546 477	341 234
Trademarks	6	78 265	68 138
Customer relationships	6	10 041	6 401
Technology & software		5 396	2 616
Total intangible assets		**640 179**	**418 389**
Property, plant and equipment			
Machinery and equipment		14 421	8 953
Fixtures, fittings and equipment		3 974	2 991
Leasehold improvements		203	-
Right-of-use assets		34 782	32 781
Total property, plant and equipment		**53 380**	**44 725**
Other non-current receivables		1 075	37
Total financial assets		**1 075**	**37**
Total non-current assets		**694 634**	**463 151**
Current Assets			
Inventories			
Finished goods and goods for resale		10 770	7 227
Total inventories		**10 770**	**7 227**
Current receivables			
Trade receivables		124 534	71 558
Current tax assets		5 307	8 094
Other receivables		3 297	7 861
Prepayments and accrued income		50 356	18 806
Total current receivables		**183 494**	**106 319**
Cash and cash equivalents		**9 795**	**72 243**
Total current assets		**204 059**	**185 789**
TOTAL ASSETS		898 693	648 940

Condensed Consolidated Statement of Financial Position

Amounts in KSEK	Note	2026-06-30	2025-06-30
EQUITY AND LIABILITIES			
Equity			
Share capital		500	500
Other contributed capital		433 396	373 721
Foreign currency translation reserve		-748	-2
Retained earnings including profit/loss for the period		-161 609	-162 641
Total equity attributable to owners of the parent		**271 539**	**211 578**
Non-current liabilities			
Bonds payable		333 253	283 744
Borrowings		4 884	4 271
Other non-current liabilities	2	59 989	-
Non-current lease liabilities		18 292	18 595
Deferred tax liability		24 991	18 788
Total non-current liabilities		**441 409**	**325 398**
Current liabilities			
Trade payables		73 011	46 432
Other current liabilities		64 582	35 424
Current lease liabilities		16 839	12 795
Accrued expenses and deferred income		31 313	17 313
Total current liabilities		**185 745**	**111 964**
TOTAL EQUITY AND LIABILITIES		898 693	648 940

Group Statement of Change in Equity

Amounts in KSEK	Share capital	Other contributed capital	Foreign currency translation reserve	Retained earnings (including profit or loss for the year)	Total
2025-01-01	500	275 078	103	-88 706	186 975
Profit (loss) for the year	–	–	–	23 424	23 424
Other comprehensive income	–	–	-104	–	-104
Total comprehensive income	**–**	**–**	**-104**	**23 424**	**23 320**
Transactions with owners					
Dividends	–	–	–	-91 149	-91 149
Capital contribution	–	120 645	–	–	120 645
Effect of common-control transaction	–	–	–	8 659	8 659
Total transactions with owners	–	**120 645**	**–**	**-82 490**	**38 154**
2025-12-31	500	395 723	-1	-147 773	248 449
2026-01-01	500	395 723	-1	-147 773	248 449
Profit (loss) for the year	–	–	–	-13 836	-13 836
Other comprehensive income	–	–	-747	–	-747
Total comprehensive income	**–**	**–**	**-747**	**-13 836**	**-14 583**
Transactions with owners					
Capital contribution	–	37 673	–	–	37 673
Dividends	–	–	–	–	–
Total transactions with owners	**–**	**37 673**	**–**	–	**37 673**
2026-06-30	500	433 396	-748	-161 609	271 539

Condensed Consolidated Statement of Cash Flows

Amounts in KSEK	2026-04-01 - 2026-06-30	2025-04-01 - 2025-06-30	2026-01-01 - 2026-06-30	2025-01-01 - 2025-06-30
Cash flows from operating activities				
Operating profit	31 459	36 041	2 276	28 972
Adjustments for non-cash items	10 583	4 840	24 488	7 884
Interest received	27	479	1 508	838
Interest paid	-11 396	-8 274	-21 352	-17 787
Income taxes paid	-11 849	337	-21 168	-9 113
Cash flow from operating activities before changes in working capital	**18 824**	**33 423**	**-14 248**	**10 794**
Cash flow from changes in working capital				
Change in inventories	-1 940	-3 598	-2 673	-3 981
Change in operating receivables	-58 610	-52 856	-54 342	-66 797
Change in operating liabilities	39 901	32 191	12 625	34 788
Total changes in working capital	**-20 649**	**-24 263**	**-44 390**	**-35 990**
Cash flows from operating activities	**-1 825**	**9 160**	**-58 638**	**-25 196**
Cash flows from investing activities				
Investments in intangible assets	-184	-330	-351	-990
Investments in property, plant and equipment	-737	-1 705	-3 180	-3 414
Proceeds from sale of property, plant and equipment	103	602	43	602
Acquisition of subsidiaries, net of cash acquired	-35 260	-28 541	-72 931	-128 373
Disposal of subsidiaries	-	-	-	-10 932
Acquisition/disposal of other financial assets	-185	31	36	91
Cash flows from investing activities	**-36 263**	**-29 943**	**-76 383**	**-143 016**
Cash flows from financing activities				
Proceeds from borrowings	-	650	60 384	2 317
Repayment of borrowings	-2 784	-576	-3 509	-105 424
Repayment of lease liabilities	-4 489	-3 300	-6 965	-4 847
Capital contributions received	-	-	-	40 200
Cash flows from financing activities	**-7 273**	**-3 226**	**49 910**	**-67 754**
Cash flows from continuing operations	**-45 361**	**-24 009**	**-85 111**	**-235 966**
Net change in cash and cash equivalents	**-45 361**	**-24 009**	**-85 111**	**-235 966**
Cash and cash equivalents at beginning of the period	55 156	96 252	94 906	308 209
Cash and cash equivalents at end of the period	**9 795**	**72 243**	**9 795**	**72 243**

Parent Company Income Statement

Amounts in KSEK	2026-04-01 - 2026-06-30	2025-04-01 - 2025-06-30	2026-01-01 - 2026-06-30	2025-01-01 - 2025-06-30
Operating income				
Net sales	4 715	11 790	12 187	23 580
Other operating income	-	-	1	-
Total operating income	4 715	11 790	**12 189**	**23 580**
Operating expenses				
Other external expenses	-14 260	-2 268	-17 757	-3 775
Personnel expenses	-2 647	-1 400	-5 057	-2 837
Depreciation, amortisation and impairment losses	-80	-44	-155	-84
Total operating expenses	**-16 987**	**-3 711**	**-22 969**	**-6 696**
Operating profit/loss	**-12 272**	**8 079**	**-10 780**	**16 884**
Financial income and expenses				
Other interest income and similar items	12	2 546	1 453	2 789
Other interest expense and similar items	-11 177	-9 602	-21 309	-19 204
Total financial income and expenses	**-11 164**	**-7 056**	**-19 856**	**-16 415**
Profit/loss after financial items	**-23 437**	**1 023**	**-30 636**	**469**
Profit/loss before tax	**-23 437**	**1 023**	**-30 636**	**469**
Profit/loss for the period	**-23 437**	**1 023**	**-30 636**	**469**

Parent Company Balance Sheet

	Note	2026-06-30	2025-06-30
Intangible assets			
Technology & software		878	906
Total intangible assets		**878**	**906**
Tangible assets			
Leasehold improvements		203	-
Fixtures, fittings and equipment		225	-
Total tangible assets		**429**	**-**
Financial assets			
Shares in subsidiaries	6	796 529	540 337
Total financial assets		**796 529**	**540 337**
Total non-current assets		**797 836**	**541 243**
Current assets			
Trade receivables		1 500	300
Receivables from group companies		13 674	20 400
Other current receivables		4 133	-
Prepaid expenses and accrued income		2 694	101
Total current receivables		**22 002**	**20 801**
Cash and cash equivalents		**2 971**	**21 312**
Total current assets		**24 973**	**42 113**
Total assets		**822 808**	**583 356**
Equity and Liabilities			
Share capital		500	500
Development expenditure fund		878	-
Other contributed capital		433 396	388 878
Retained earnings including net profit/loss for the period		-114 245	-94 766
Total equity		**320 529**	**294 612**
Untaxed reserves		10 800	–
Bond loan		333 253	283 493
Other non-current liabilities	2	59 954	-
Total non-current liabilities		**393 207**	**283 493**
Accounts payable		13 486	330
Current tax liabilities		6 716	–
Liabilities to group companies		52 219	–
Other current liabilities		24 985	4 408
Accrued expenses and deferred income		866	513
Total current liabilities		**98 272**	**5 251**
Total liabilities		**491 479**	**288 744**
Total equity and liabilities		**822 808**	**583 356**

Note 1 - General Information and Accounting Policies

This interim report comprises the parent company Dura Sverige AB (publ) ("Dura" or the "Company"), corporate registration number 559352-0207, and its subsidiaries. Dura Sverige AB is a parent company incorporated in Sweden with its registered office in Stockholm at Frihamnsgatan 68. The parent company and its subsidiaries operate in the sale of services and products within sustainable property maintenance, including roof maintenance, roof installation, insulation and ventilation.

Unless otherwise stated, all amounts are presented in thousands of Swedish kronor (KSEK). Figures in parentheses refer to the comparative period.

The Group prepares its financial statements in accordance with International Financial Reporting Standards (IFRS) as adopted by the EU. This interim report has been prepared in accordance with IAS 34 Interim Financial Reporting and RFR 1 Supplementary Accounting Rules for Groups.

The accounting policies applied are consistent with those described in the Group's published annual report for the financial year ended 31 December 2025.

Note 2 - Financial Instruments

The carrying amount of the Group's non-current financial instruments measured at amortized cost corresponds to their fair value, as the interest rates are in line with current market rates.

As of June 30th, 2026, contingent consideration related to acquisitions amounted to 40.6 MSEK was recognised in the balance sheet and measured at fair value through profit or loss. During the first quarter of 2026, the contingent consideration present per year-end 2025 was remeasured and the liability was derecognised in full, resulting in a gain of 10.9 MSEK recognised in the income statement.

Note 3 - Estimates and Judgements

The Group makes estimates and assumptions concerning the future. By definition, the resulting accounting estimates will seldom equal the related actual results. The estimates and assumptions that involve a significant risk of causing material adjustments to the carrying amounts of assets and liabilities within the next financial year are outlined below.

Business Combinations

In connection with business combinations, the Group applies valuation techniques to determine the fair value of identifiable intangible assets, primarily trademarks, customer relationships and internally developed software. The valuations are based on discounted cash flow models using management-approved forecasts. Key assumptions include revenue growth, operating margins, customer attrition, royalty rates (for trademarks valued using the relief-from-royalty method) and discount rates. Royalty rates are determined with reference to comparable market data and industry benchmarks. The measurements are sensitive to changes in these assumptions.

Measurement of Contingent Consideration

The Group may enter into contingent consideration arrangements based on the future performance of acquired entities. Contingent consideration is recognised at fair value at the acquisition date and subsequently remeasured at fair value at each reporting date. The valuation is based on expected future revenue and EBITDA development, discount rates and the expected timing of payments. Changes in assumptions are recognised in profit or loss.

Impairment of Goodwill

Goodwill is tested for impairment at least annually, or when indicators of impairment exist. Testing is performed at the level of cash-generating units (CGUs). The recoverable amount is determined as value in use using discounted cash flow models based on five-year forecasts. Key assumptions include revenue growth, operating margins, capital expenditure, working capital requirements and long-term growth rates. The discount rate reflects the Group's weighted average cost of capital, adjusted for CGU-specific risks. The impairment assessment is sensitive to changes in discount rates, long-term growth rates and operating margins. No impairment losses have been recognised during the period.

Note 4 - Segment Reporting

The Group’s operations are managed and reported based on the following two operating segments:

Roofing – roof maintenance, roof painting, and roof replacement
Indoor Climate – insulation, ventilation, and drainage

Central/Other consists of the Group’s parent company, eliminations of intra-group transactions, and income from non-external customers.

Sales between segments are conducted on arm’s length terms and are eliminated on consolidation.

More than 99 % of the Group's sales are in Sweden during the first half of the year with that share expected to decrease during H2 as KTV Group is fully consolidated.

2026-01-01 - 2026-06-30	Roofing	Indoor Climate	Central/other	Total
Revenue	219 398	214 385	-198	433 586
Expenses	-185 042	-210 368	-35 899	-431 310
Operating profit	**34 356**	**4 017**	**-36 097**	**2 276**
Net finance income/(costs)	-44	-91	-11 332	-11 467
Income tax expense	-202	-116	-4 327	-4 645
Profit (loss) for the period	**34 110**	**3 810**	**-51 756**	**-13 836**

2025-01-01 - 2025-06-30	Roofing	Indoor Climate	Central/other	Total
Revenue	190 248	87 718	-	277 966
Expenses	-162 905	-73 787	-12 302	-248 994
Operating profit	**27 343**	**13 931**	**-12 302**	**28 972**
Net finance income/(costs)	-38	-292	-17 252	-17 582
Income tax expense	-	-	-4 419	-4 419
Profit (loss) for the period	**27 305**	**13 639**	**-33 973**	**6 971**

Revenue from contract with customers	2026-01-01 - 2026-06-30	2025-01-01 - 2025-06-30
Sales of goods	128 728	22 751
Sales of services	304 220	254 597
Total revenue from external customer	**432 948**	**277 348**
Other income	638	618
Total revenue	**433 586**	**277 966**

Note 5 - Transactions with Related Parties

There have been no significant changes in the composition of the Group's related parties compared to those described in the Group's annual report for 2025. The Group uses internal loans in the ordinary course of business and has no other significant related party transactions.

Note 6 - Acquisitions during the Quarter

KTV Group AS

On May 22nd, 2026, the Parent Company acquired 100% of the share capital of KTV Group AS, a leading provider of cleaning, surface treatment and maintenance services across the offshore, industrial and property sectors. With more than three decades of experience, the Group combines specialised expertise with innovative technologies and ISO-certified processes to deliver safe, efficient and high-quality services.

The table below summarises the purchase consideration paid for KTV Group AS as well as the fair value of the acquired assets and assumed liabilities as recognised on the acquisition date.

Purchase price	
Cash and cash equivalents	43 501
Shareholder contribution	15 214
Fair value of contingent consideration	977
Total purchase consideration paid	**59 692**
Fair value of identifiable acquired assets and assumed liabilities	
Cash and cash equivalents	8 241
Property, plant and equipment (PPE)	6 234
Capitalized development expenses	23
Other current assets	19 391
Trademark	2 259
Customer relationships	3 225
Deferred tax liabilities	-1 327
Trade and other payables	-12 356
Total identifiable net assets	**25 690**
Goodwill	34 002
Acquired net assets	**59 692**

Goodwill

Goodwill is attributable to future growth prospects and expected synergies. No part of the recognised goodwill is expected to be tax deductible.

Revenue and profit or loss of the acquired business

KTV Group AS has been consolidated as of 1 June 2026 and has contributed revenue of 3.1 MSEK and profit of 0 MSEK for the period 1 June 2026 – 30 June 2026.

Acquisition-related costs of 1.5 MSEK are included in administrative expenses in the Group's statement of comprehensive income and in operating activities in the statement of cash flows.

Contingent consideration

The share purchase agreement includes contingent consideration linked to the Company's future EBITA. The total contingent consideration may amount to a maximum of 19.7 MNOK over a two-year period. The fair value of the contingent consideration at the reporting date amounts to 1 MSEK.

Purchase consideration – cash outflow	**2026**
Cash flows from acquisitions of subsidiaries, net of cash acquired	
Cash purchase consideration	43 501
Deducting: cash acquired	-8 241
Net cash outflow from investing activities	**35 260**

Alternative Performance Measures

This report includes alternative performance measures ("APMs") that are not defined under International Financial Reporting Standards (IFRS). These measures are presented to provide additional insight into the Group's financial performance and financial position and are used by management for monitoring and analysis of the business.

The APMs should not be regarded as substitutes for IFRS measures but as complementary information. Definitions of the APMs and reconciliations to the most directly comparable IFRS measures are presented below.

EBITDA

EBITDA is defined as operating profit (EBIT) before depreciation and amortisation. EBITDA margin is defined as EBITDA as a percentage of net sales. These measures are used to illustrate the Group's underlying operating performance and profitability before the impact of capital structure, tax and non-cash depreciation and amortisation expenses.

A reconciliation of EBITDA to operating profit (EBIT), which is the most directly comparable IFRS measure, is presented below.

Net Interest-bearing Debt

Net interest-bearing debt is defined as interest-bearing liabilities, including bonds and other borrowings, excluding lease liabilities, less cash and cash equivalents. The measure is used to illustrate the Group's net indebtedness and financial position.

A reconciliation of net interest-bearing debt to the most directly comparable IFRS measures is presented below.

Pro forma Revenue and Adjusted EBITDA

Pro forma Adjusted EBITDA is defined in accordance with the definitions set out in the Group's bond terms and conditions. The measure represents Adjusted EBITDA calculated on a rolling twelve-month (R12) basis and on a pro forma basis, reflecting the earnings of acquired companies as if they had been owned for the entire twelve-month period. The APMs are used to calculate the covenant ratio for the Group's senior secured bond and therefore, the accounting principles applicable on the issue date (K3) are applied in accordance with the bond terms. More information is provided in the section "Financial Position and Capital Structure". Adjustments are made for transaction-related costs and other items affecting comparability.

Pro forma revenue is calculated on the same basis. Further information and reconciliations are presented below.

Alternative Performance Measures

	JAN-JUN 2026	JAN-JUN 2025	APR-JUN 2026	APR-JUN 2025
EBIT	2.3	29.0	31.5	36.0
Depreciation & amortization	24.5	7.5	10.6	4.5
EBITDA	**26.8**	**36.5**	**42.1**	**40.5**
Net sales	432.9	277.3	296.5	204.8
EBITDA-margin	**6%**	**13%**	**14%**	**20%**

	Q2-2026	Q2-2025
Bond payable	333.3	283.7
Borrowings	4.9	4.3
Interest-bearing debt	**338.1**	**288.0**
Cash and cash equivalents	9.8	72.2
Net interest-bearing debt	**328.3**	**215.8**

	R12 JUN 2026	R12 JUN 2025
Revenue	432.9	277.3
Revenue H2 prior year	370.1	151.2
Effect of pro forma	169.2	359.4
Pro forma revenue (R12)	**972.2**	**787.9**
EBITDA H1 current year	**26.8**	**36.5**
Effect of accounting for leases	-12.3	-7.1
Effect of transaction costs	3.6	6.9
EBITDA H2 prior year	48.8	5.6
Effect of pro forma	36.9	35.1
Adjustments for items affecting comparability	19.4	18.7
Adjusted EBITDA (R12)	**123.2**	**95.7**
Cap 10% adjustments	-9.0	-11.0
Adjusted EBITDA incl. Cap (R12)	**114.2**	**84.7**
Adjusted EBITDA margin	12.7%	12.1%
Adjusted EBITDA margin incl. Cap	11.7%	10.8%

The Board of Directors and the Chief Executive Officer certify that this interim report provides a true and fair overview of the Group's operations, financial position and results.

Stockholm, August 31st, 2026

Viktor Bolmgren
Chairman of the Board

Niclas Winberg
Board Member /
Chief Executive Officer

Alexander Singer
Board Member

Interim Report
Q2 2026