

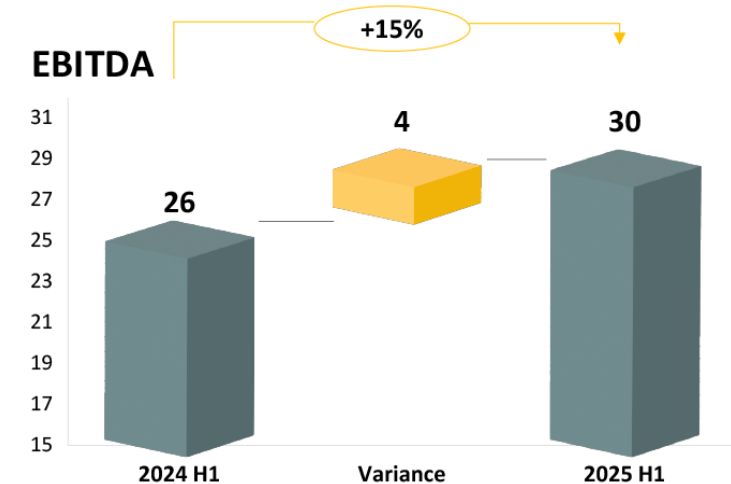
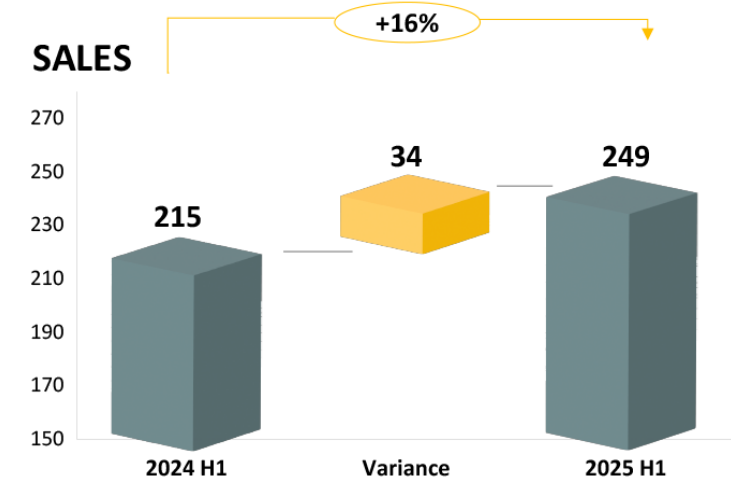




# **Group Financial Performance H1 2025**

# H1 2025 Financial Review

**Turnover** increased by **16%**  
and **EBITDA** by **15%** in H1 2025,  
in line with our long-term **growth strategy**



**Operating Profit up 17% and Earnings After Tax up 72%**, highlighting our focus for **Value Creation**

# Income Statement

	2025 H1	2024 H1	Variance
Turnover	249	215	16%
<b>Gross Profit</b>	<b>64</b>	<b>58</b>	<b>11%</b>
<b>Gross Profit Margin</b>	<b>26%</b>	<b>27%</b>	
<b>EBIT</b>	<b>22</b>	<b>19</b>	<b>17%</b>
<b>EBIT Margin</b>	<b>9%</b>	<b>9%</b>	
<b>EBITDA</b>	<b>30</b>	<b>26</b>	<b>15%</b>
<b>EBITDA Margin</b>	<b>12%</b>	<b>12%</b>	
<b>EBT</b>	<b>17</b>	<b>12</b>	<b>44%</b>
<b>EBT Margin</b>	<b>7%</b>	<b>6%</b>	
<b>EAT</b>	<b>16</b>	<b>9</b>	<b>72%</b>
<b>EAT Margin</b>	<b>6%</b>	<b>4%</b>	
EPS	0,2695	0,2038	

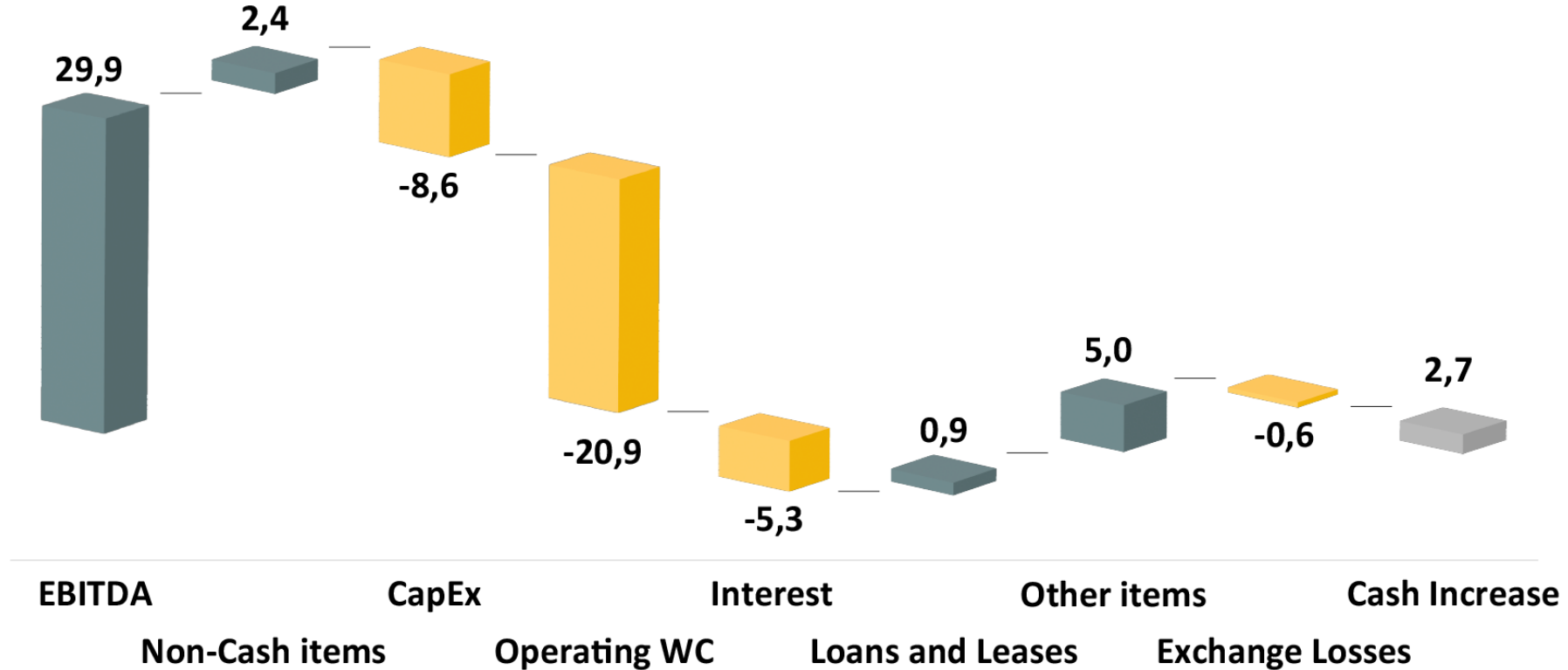
# Balance Sheet

	30/6/2025	31/12/2024
Fixed Assets	207	208
Other NC Assets	18	14
<b>Non Current Assets</b>	<b>224</b>	<b>222</b>
Inventories	120	116
Receivables	137	119
Cash & Cash Equivalents	20	18
Other Current Assets	16	14
<b>Current Assets</b>	<b>292</b>	<b>266</b>
<b>Total Assets</b>	<b>516</b>	<b>487</b>
Bank Loans	157	155
Liabilities from Leases	11	10
Payables	104	100
Other Liabilities	65	52
<b>Total Liabilities</b>	<b>337</b>	<b>317</b>
<b>Equity</b>	<b>179</b>	<b>170</b>
<b>Equity + Liabilities</b>	<b>516</b>	<b>487</b>

Key Ratios	30/6/2025	31/12/2024
Total Debt	168	165
Cash & Cash Equivalents	20	18
Net Debt	148	147
Net Debt / Equity	0,83	0,87

**Seasonality** led to higher **Working Capital**, aligned with the company's operating cycle

# H1 2025 Cash Flow



**Cash flow** remained **strong**, while supporting the **Investment** program



# **Alumil SA Financial Performance H1 2025**

**Sales** and **EBITDA** were temporarily impacted by the IT upgrade, while **EAT** rose **+56%** supported by dividends from strong Group results.

# Income Statement

	2025 H1	2024 H1	Variance
Turnover	134,0	130,4	3%
<b>Gross Profit</b>	<b>21,8</b>	<b>23,7</b>	<b>-8%</b>
<b>Gross Profit Margin</b>	<b>16%</b>	<b>18%</b>	
EBIT	4,7	9,5	-50%
<b>EBIT Margin</b>	<b>4%</b>	<b>7%</b>	
EBITDA	8,5	13,1	-36%
<b>EBITDA Margin</b>	<b>6%</b>	<b>10%</b>	
Finance Expenses	-4,1	-5,4	-24%
Finance Income	5,5	1,0	456%
EBT	6,1	5,0	21%
<b>EBT Margin</b>	<b>5%</b>	<b>4%</b>	
EAT	5,8	3,7	56%
<b>EAT Margin</b>	<b>4%</b>	<b>3%</b>	



# Balance Sheet

	30/6/2025	31/12/2024
Fixed Assets	111	110
Other NC Assets	96	95
<b>Non Current Assets</b>	<b>208</b>	<b>205</b>
Inventories	59	55
Receivables	59	60
Cash & Cash Equivalents	4	5
Other Current Assets	10	6
<b>Current Assets</b>	<b>132</b>	<b>125</b>
<b>Total Assets</b>	<b>339</b>	<b>330</b>
Bank Loans	136	140
Liabilities from Leases	3	4
Payables	49	47
Other Liabilities	42	37
<b>Total Liabilities</b>	<b>231</b>	<b>228</b>
<b>Equity</b>	<b>108</b>	<b>103</b>
<b>Equity + Liabilities</b>	<b>339</b>	<b>330</b>

Key Ratios	30/6/2025	31/12/2024
Total Debt	140	144
Cash & Cash Equivalents	4	5
Net Debt	135	139
Net Debt / Equity	1,25	1,35

**Total Debt** reduced further by 4m€

# Alumil SA Shareholders

**Group EPS** was temporarily impacted by Alumil SA's slower start from the IT upgrade

**Alumil SA EPS** increased **56%** , supported by dividends from the Group's performance

Group	2025 H1	2024 H1	Variance
Earnings After Tax	15,5	9,0	72%
Alumil SA Shareholders	8,7	6,6	32%
Minotiry Shareholders	6,8	2,5	171%
<b>Earning Per Share</b>	<b>0,2695</b>	<b>0,2038</b>	<b>32%</b>

Alumil SA	2025 H1	2024 H1	Variance
Operating Profit	4,7	9,5	-50%
Earnings After Tax	5,8	3,7	56%
<b>Earning Per Share</b>	<b>0,1798</b>	<b>0,1152</b>	<b>56%</b>

# Alumil SA Shareholders

The table presents the Total Comprehensive Income, which also includes the Other Comprehensive Income arising from the translation of the financial statements of the Group's foreign subsidiaries whose functional currency differs from the euro. Subsidiaries operating in countries with a different currency translate, at each reporting date, their financial figures (such as inventories, property, assets and equipment, and other balance sheet items) into euros– the presentation currency of the consolidated financial statements – based on the prevailing exchange rates and in accordance with IFRS.

The differences resulting from this translation are presented in the Statement of Other Comprehensive Income and are recognized directly in Equity as a revaluation/accounting measure. They do not affect the Group's profit or loss, which reflects exclusively the operating activities of the Group companies. (For example, inventories are sold under euro clauses, so no foreign exchange differences arise from them).

Group (OCI Included)	2025 H1	2024 H1	Variance
Earnings After Tax	15,5	9,0	72%
<b>Other Comprehensive Income/(Loss) After Tax Items that may be reclassified subsequently to Profit or Loss</b>			
Foreign currency translation differences of subsidiaries	-3,8	-0,6	-576%
Earnings After Tax	11,8	8,6	38%
Alumil SA Shareholders	6,2	5,8	6%
Minority Shareholders	5,6	2,8	103%

# Q&A

