kontron
The Power of IoT

Q2 2026

Investor Presentation

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6th August 2026, Linz

Kontron: Results & Company Highlights

Q2 2026

Results Highlights

- **Growth in Key Markets Q2**
  Defense: +32%
  Software: +16%
  Transportation: +11%
- **Adjusted EBITDA up EUR 55m**
  vs EUR 46m Q1 26 and Q2 25 (+20%)
- **Further Increased Backlog**
  Very strong book-to-bill ratio of 1.55
  Record backlog of EUR 2,750m
  First EU OEM for 5G NADs

Q2 2026

Company Highlights

- **GreenTec Restructuring**
  Savings of EUR 30m expected on run-rate basis – 424 FTE reduced out of target of 500 FTE)
- **Defense in Spotlight in 2026**
  Growth to >EUR 200m in 2026 expected
- **Ennoconn/Foxconn Partnership**
  Mandatory tender offer period ended
  Expected synergies of EUR 40m p.a. to materialize in the next years

KPIs Q2 2026

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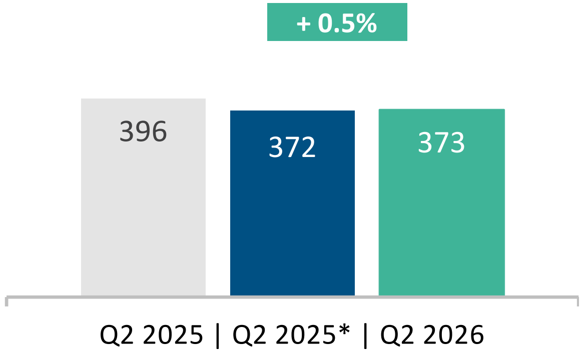
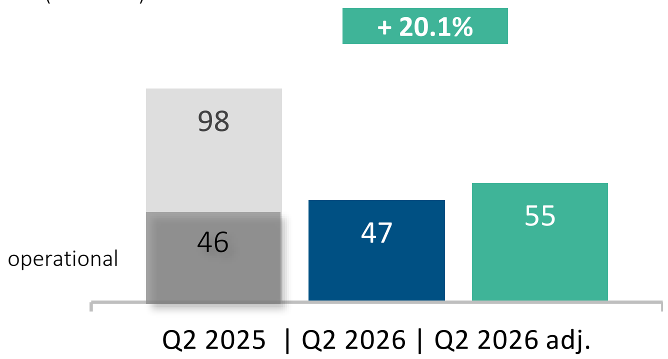
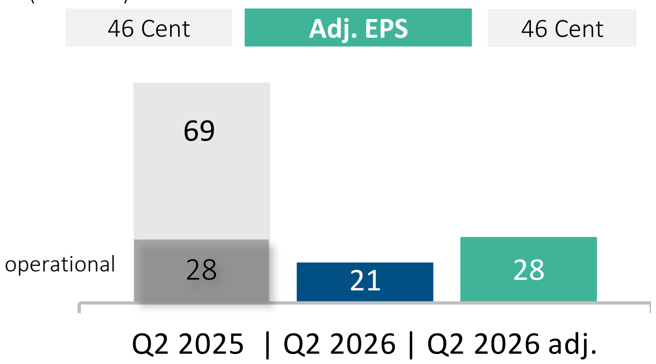
Revenues
(in EUR m)



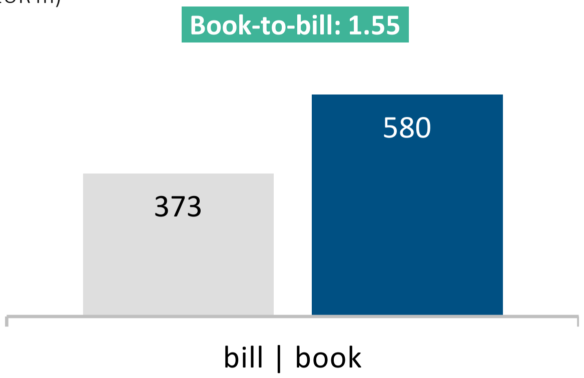
EBITDA
(in EUR m)



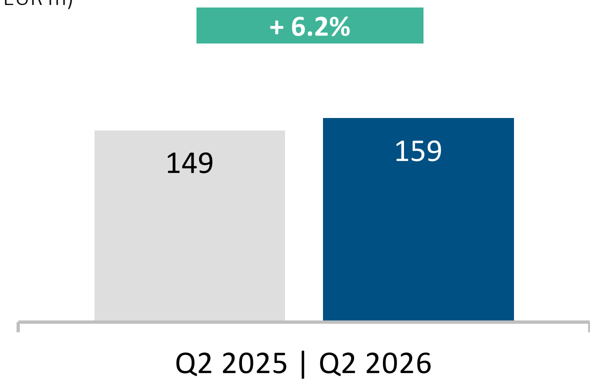
Net Result after NCI
(in EUR m)



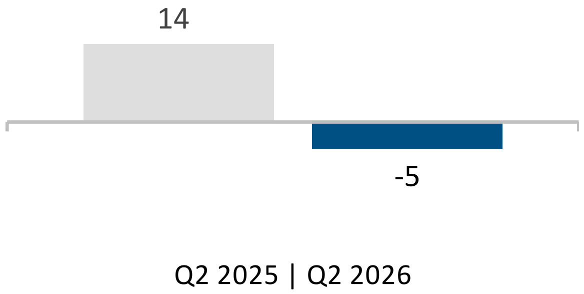
Order Entry vs. Revenues
(in EUR m)



Gross Profit**
(in EUR m)



Operating Cash Flow
(in EUR m)



* Adjusted for divestments and deconsolidation of COM biz.
** Burdened by divestments and deconsolidation of COM biz.

KPIs H1 2026

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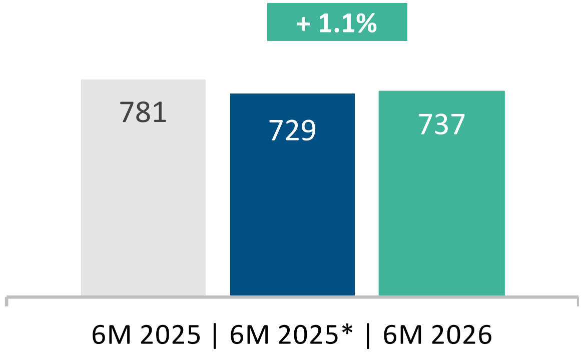
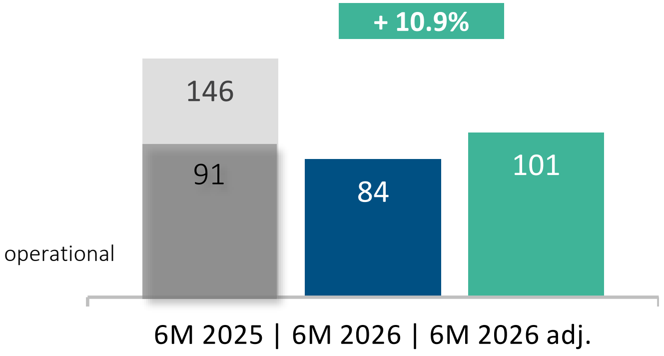
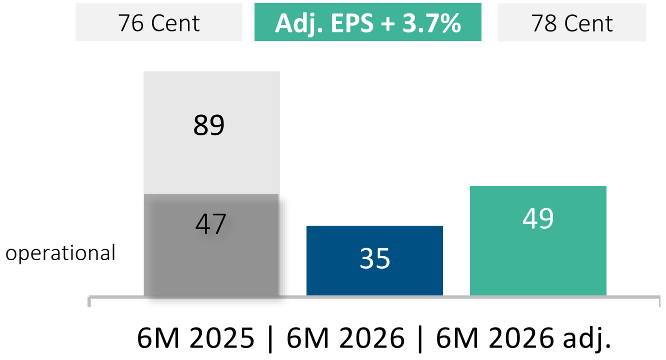
Revenues
(in EUR m)



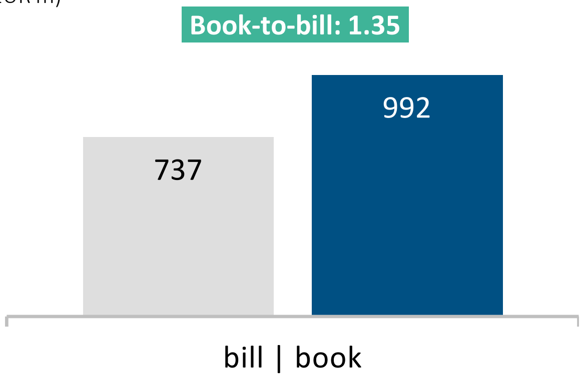
EBITDA
(in EUR m)



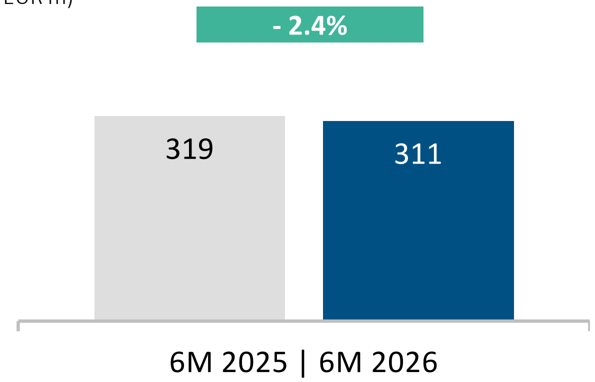
Net Result after NCI
(in EUR m)



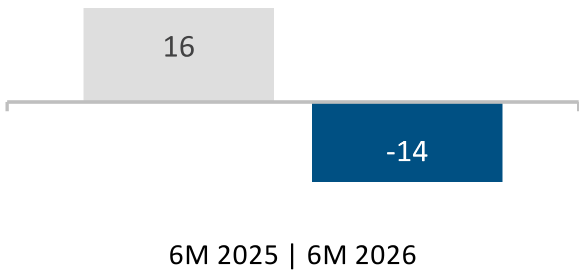
Order Entry vs. Revenues
(in EUR m)



Gross Profit**
(in EUR m)



Operating Cash Flow
(in EUR m)



* Adjusted for divestments and deconsolidation of COM biz.
** Burdened by divestments and deconsolidation of COM biz.

Kontron Group Balance Sheet Q2 2026

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in EUR m	30.06.2026	31.12.2025
NON-CURRENT ASSETS	**819.9**	**833.9**
Tangible assets	234.6	236.3
Intangible assets	182.5	166.4
Goodwill	255.4	255.1
Other assets	147.5	176.1
CURRENT ASSETS	**976.7**	**953.2**
Inventories	366.1	318.5
Trade receivables	194.5	196.9
Contract assets from customers	83.3	77.8
Cash and cash equivalents	171.5	263.5
Other receivables and prepayments	161.2	96.5
Total assets	**1,796.6**	**1,787.1**

in EUR m	30.06.2026	31.12.2025
EQUITY	**749.3**	**746.1**
Accumulated results	661.8	626.9
as of treasury shares	-52.0	-22.4
NON-CURRENT LIABILITIES	**409.6**	**355.1**
Long-term loans and borrowings	263.1	216.7
Other liabilities and provisions	146.5	138.3
CURRENT LIABILITIES	**637.7**	**685.9**
Trade payables	235.9	228.0
Contract liabilities from customers	54.5	58.9
Short-term loans and borrowings	161.5	193.9
Other liabilities and provisions	185.8	205.1
Total liabilities & equity	**1,796.6**	**1,787.1**

Equity ratio	**41.7%**	**41.8%**
Total net debt*	**-253.1**	**-147.1**
Working capital**	**324.8**	**287.4**

- Impact of supply chain disruptions – lower inventory expected at year end
- Strict inventory management in place to lower exposure

* Definition Net Debt: Cash and cash equivalents less non-current and current financing liabilities (excl. liabilities from leasing according to IFRS 16)
** Definition Working Capital: Inventories plus trade receivables less trade payables (excl. IFRS 15 contract assets and liabilities)

Additional Disclosures

H1 2026

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Revenues Growth Breakdown

	in EUR m
Reported 3rd party revenues H1 2025	781
Deconsolidation COM	39
Sold IT BG + HU	13
ORGANIC GROWTH	1.1%

Delinquent Backlog

	in EUR m
31/03/2026	33
30/06/2026	50

EBITDA Growth Breakdown

	in EUR m
Reported EBITDA H1 2026	84
Restructuring Program CSP	17
EBITDA ADJUSTED	101

Revenues Growth excl. GreenTec

	in EUR m
Adjusted 3rd party revenues H1 2025	729
GreenTec H1 2025	70
Adjusted 3rd party revenues H1 2025 excl. GreenTec	**659**
Reported 3rd party revenues H1 2026	737
GreenTec H1 2026	45
Adjusted 3rd party revenues H1 2026 excl. GreenTec	**692**
ORGANIC GROWTH	5.0%

Status Liquidity

- EUR 172m cash on hand
- EUR 142m available lines
- EUR 126m expected additional inflow from COM deconsolidation

Kontron: Major KPIs

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Solid Development in H1 2026 in Challenging Environment

in EUR m	H1 2024	H1 2025	H1 2026	Comment
Revenues	780	729*	737	EUR 57m of divested entities revenues
Gross Margin (in %)	42.0%	40.8%	42.2%	Improvements expected to come based on more S + S revenues
EBITDA	82	91*	101*	Ongoing improvement over last years – H1 26 impacted by restructuring cost EUR 17m
Net Profit	38	47*	49*	Operationally strong; one-time effect impact of EUR 13.9m in H1 2026
Equity Ratio	33.7%	38.1%	41.7%	Strong improvement over last quarters - to be further improved in H2 2026
Working Capital	403	307	325	Significant improvement since 2024 - to be further improved in H2 2026
Operating CF	-17	16	-14	Operating CF in seasonally weak H1 impacted by supply-chain crisis
FTE	7,688	6,938	6,397	424 FTE reduced in H1 2026 (no engineers)
Net Cash/Debt	-210	-255	-253	Target < 1 time EBITDA; Cash-in of EUR 126m yet to come

*Adjusted

Record Backlog of EUR 2,750m

Design Wins impacted by COM deconsolidation

Kontron secures a new European customer for 5G automotive modules manufactured in Germany

Q3

Kontron Transportation receives major order worth nearly 100 million euro

Q3

Kontron Transportation wins contract to modernize the railway communications core network for the Portuguese Railways

Q3

Kontron AIS Wins Major Software Contract for Rail Yard Modernization in Belgium

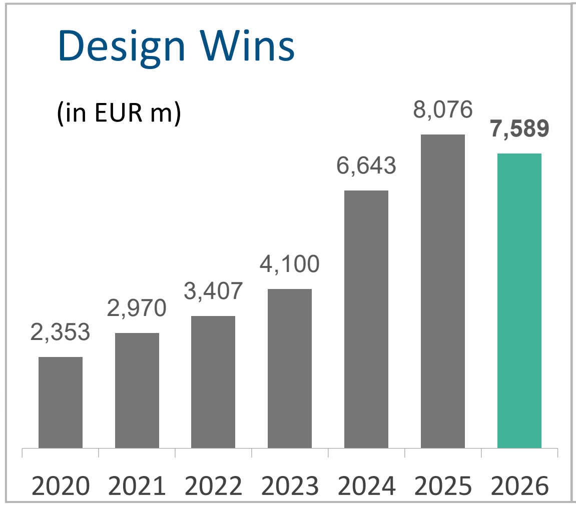
Q3

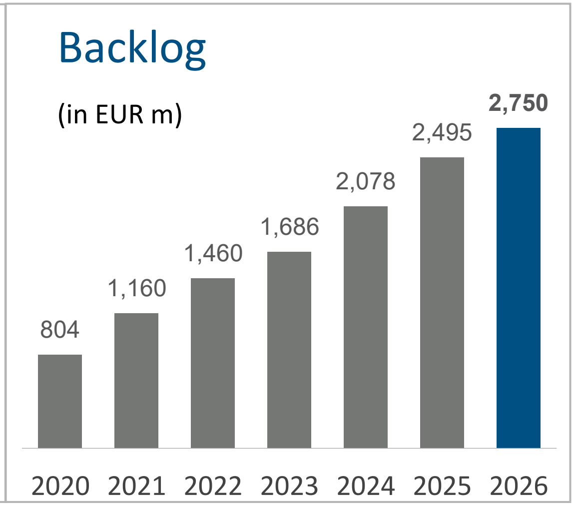
Kontron secures EUR 20 million Cybersecurity contract

Kontron to Power Multinational Energy Equipment Manufacturer with Control Systems in a Market Poised for $100M in Growth

Big Contract Win in France: Kontron Transportation Signs Three-Digit Million Euro Contract with SNCF

Kontron Transportation receives EUR 26 million order from Czech Railways





Backlog Coverage 2026	in EUR m
Open Backlog for 2026	875
Revenues H1 2026	737
Total	1,612
COVERAGE 2026	100%

Segment Structure 2026

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New Setup: 8 Divisions in 2 Segments

Industrial

Telecom

North America

Asia

ODM

FC 2030
Rev 2,600m
EBITDA 420m

Target FC 2030
EUR 1,700m*
10% EBITDA margin

Cyber Solutions

Transportation

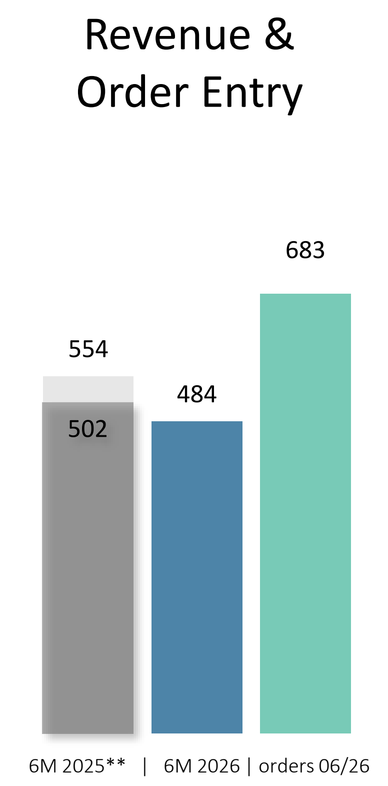
Aerospace & Defense

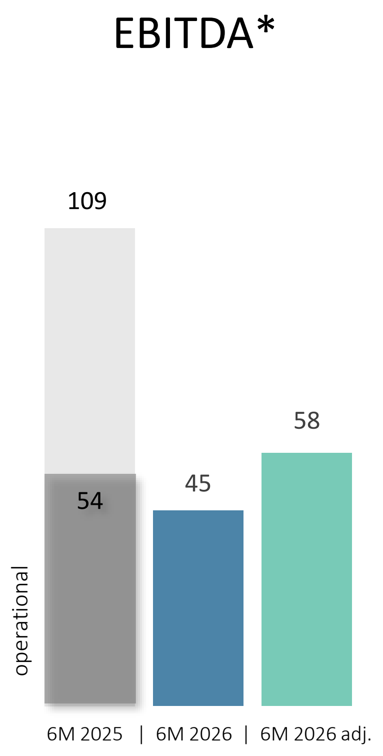
Target FC 2030
EUR 1,500m*
20% EBITDA margin

*Revenues before consolidation, total EUR 2,600m.

Smart IoT

Reduce Low Margin Biz





About the Segment & Strategy

- Combination of former Europe and Global Segment, burdened by declining Greentec biz
- IoT products not dedicated to vertical market applications
- Revenues adjusted for 2025 deconsolidated entities (Jumptec, KAIM, IT services BG+HU)
- Broad base of IoT products/technologies for various industries, also EUR 20m in defense revenues
- Represents 65% of group revenues and 53% of EBITDA
- Strong Pan-European cost-efficient engineering base
- USP: All products to include CRA compatible security Software (in progress)

Supply Chain Issues

- Flash + DDR4 + CPUs are on allocation (driven by AI demand)
- EUR 50.4m of scheduled orders not shipped in H1/2026 (EUR 17m EBITDA delayed)
- -> Foxconn will help us

About America

- Tailwind by local factories in USA + CAD (AS 9100 & ITAR defense certified)
- Target increase USA + CN to 30% of group revenues (today ~ 20%)
- Market in USA and China grows faster than Europe

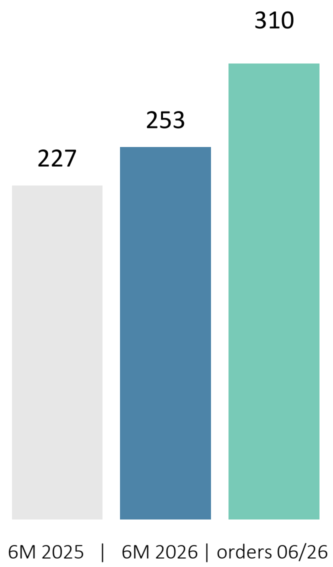
Proceed to Phase Out Low Margin Biz – First CRA compatible IoT Supplier

*EBITDA before Intercompany HQ fees (part of Smart IoT Segment)
** Adjusted for COM business

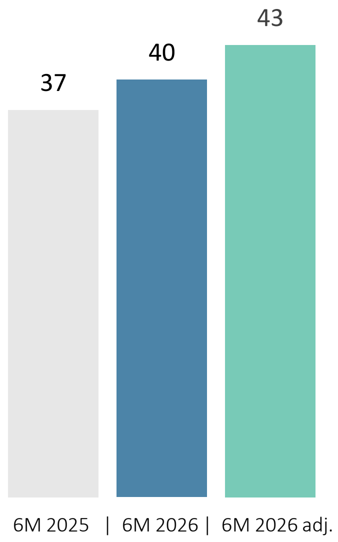
Software + Solutions: Fast Growing – Our Focus

Strongest EBITDA Contributor, Just Started in 2020

Revenue &
Order Entry



EBITDA*



About the Segment & Strategy

- Consists of IoT technology specialized for defense + trains + cybersecurity
- H1 burdened by GreenTec -> need to solve in 2026
- > 60% of Kontron R&D dedicated to this segment
- EBITDA margin 17% - will improve after restructuring GreenTec
- Significant Software share -> GM 60%, Technology leader
- Not impacted by chip crisis
- Currently mainly Europe, we started to roll out globally

CRA compatible AI supported KontronOS

- K-OS, AI-Shield and K-Grid to become the *de facto* standard with 80m licenses by 2030
- Spread in avionics, WBX, ARM-based, pub transport, target for 2026; install on all IoT devices

Transportation (high-speed trains)

- Market leader in Europe, only supplier dedicated to FRMCS

Defense and Aerospace

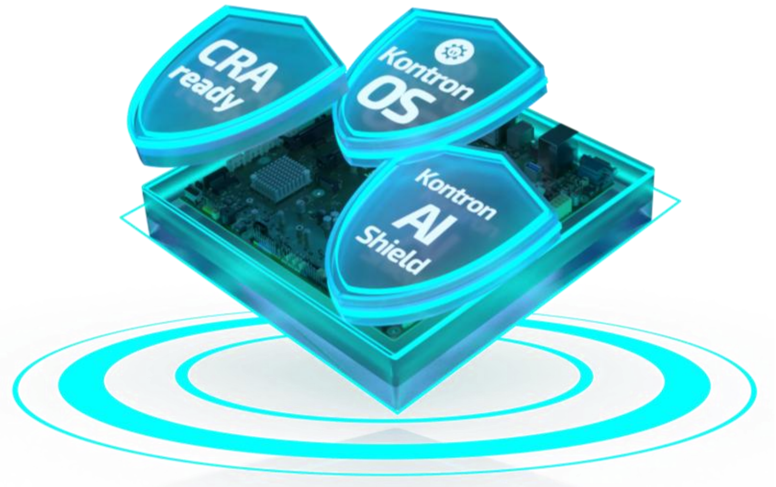
- Major NATO supplier for encrypted data communication

Represents Today 54% of Group Profits, Target 2030: Increase to 75%, 2026: Need to Solve GreenTec

*EBITDA before Intercompany HQ fees (part of Smart IoT Segment)

Cybersolutions

KPI-Update for H1 2026



In EUR m	H1 2025	H1 2026
Third-Party Revenues	59	69
EBITDA	6	7
Backlog	111	102

Global rise in cyber threats and stricter regulations like the Cyber Resilience Act are making cybersecurity and resilient digital solutions more critical than ever.

About the Technology

- KontronOS layer to enable CRA compatible products, AI-Shield to protect data traffic
- Unlimited potential - 40 Bn IoT devices connected
- Roll out on all KTN/ENN devices (4m/a) + retrofit field -> 2030 we plan 80m field devices
- Customers may pay licence fee to become CRA compatible -> huge potential > 500m
- CRA Technology leader with approx. 600 engineers (+20% vs 2025)
- CRA is a regulatory necessity

Defense

KPI-Update for H1 2026

In EUR m	H1 2025	H1 2026
Third-Party Revenues	63	84
EBITDA	10	16
Backlog	82	111

About the Technology

- VPX enables high speed data communication among military equipment
- Strong encryption to protect sensitive data
- Compatible AS 9100 + ITAR defense standards dedicated to NATO
- Benefit from strong spendings

Global increase in defense spendings making cybersecurity and the upgrade to intelligent communication solutions more critical than ever.

Transportation

KPI-Update for H1 2026

In EUR m	H1 2025	H1 2026
Third-Party Revenues	108	120
EBITDA	21	20
Backlog	641	703

Growth momentum building from 2026, supported by 50% market share and 5G-driven rail modernization.

About the Technology

- Sensitive rail communication at 5G speed
- Technology leader in FRMCS standard, (mandatory in 2027 in EU)
- 620 engineers
- Key customers: DB, SNCF, network rail – we hold > 50% market share in Europe
- Other products: avionics servers (6000 airplanes), Public transportation, cab radio
- Driven by infrastructure spendings, (DE 500bn)

Update Restructuring Program CSP 2026

Target:

- Adjust solar and WBX headcount to actual biz, back to profits in Q4/2026
- Achieve annual savings of > EUR 30m starting 2027 with one time EUR 25m in restructuring costs in 2026
- Reduction of 500 FTE (mainly GreenTec); completed in Q3/2026

Achievements H1/2026:

- Headcount (FTE) reduced by 424 FTE plus 54 ext ressources
- 12/2025: 6,696 FTE -> 6/2026: 6,397 FTE
- 124 FTE settled and will leave in Q2

Solar products:

- No new solar designs - maintain biz but no major new investments
- Focus on IoT connected inverters with HEMS Software (technology leader in this niche)
- Integrate solar into Div industrial for more synergies
- Transfer to low-cost location BG

GreenTec WBX:

- Focus on existing customers Porsche, VW, Volvo – no major new investments
- Keep connected WBX biz, focus on bidi functionality,
- Combine Engineering resources with Div Cyber solutions

Cooperation & Synergies Ennoconn

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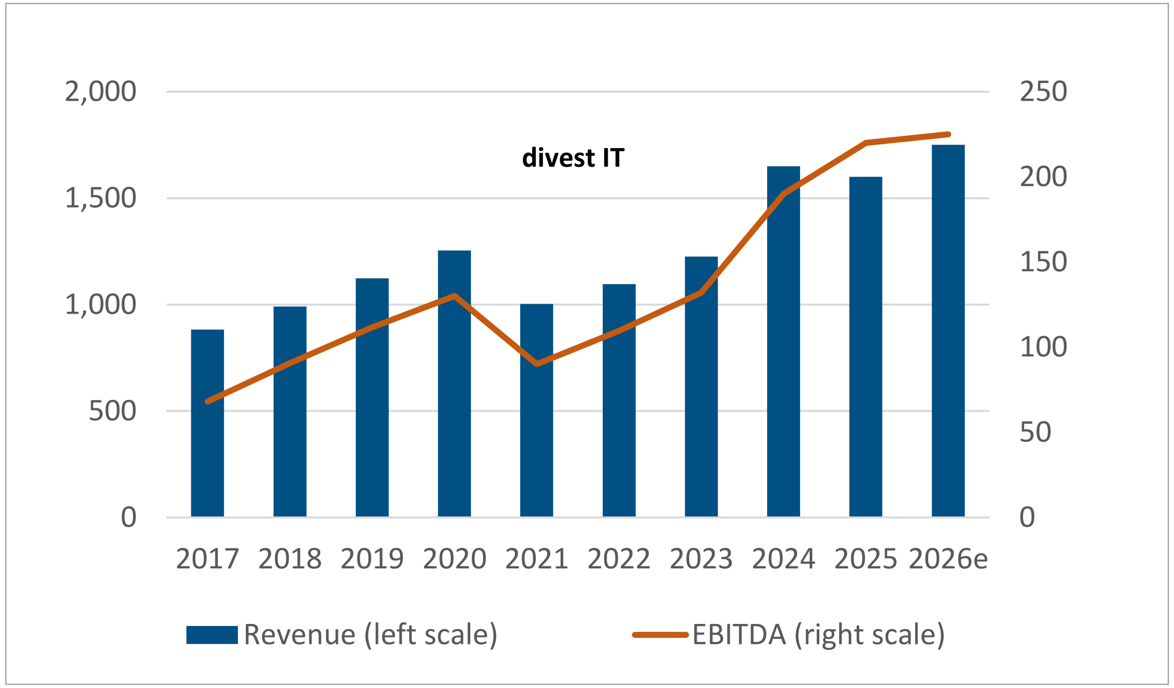
	Topic	Revenue potential	Synergy potential
management	Add joint experienced hi tech leaders in sales & biz development	enabler	
Technology	Install Kontron OS on ENN products (add unique CRA security features) - Blue chip customers - ENN std products (Vecow, ENNC Mobo)	500k pcs @ 10$ 100k pcs @ 15$	$ 5m $ 1,5m
Technology	Kontron is technology leader for high speed train infrastructure and flight servers for avionics. Products are not sold in volume in China and SEA. Local for local production at ENN. Market size larger than in Europe, target: get 20% of EU volume	$ 60m	$ 12m
Technology	Add Kontron technology to Foxconn products in robotics, AI data center, e-mobility	huge	
ODM	Kontron is among top #5 local ODM companies in Europe. (electronic²) Offer Foxconn superior services together with Kontron R&D – results in the leading ODM in Europe	$ 200m	$ 10m
Sales	Kontron standard products sold in China/SEA via ENN, get 10% of EU volume	$ 80m	$ 8m
Americas	Integrate sales channels in USA, reduce cost by 10% (Kontron brand)		$ 2m
Americas	Focus on tier 1 US chip customers > $ 100m p.a., find 2 more of such customers	$ 300m	$ 30m
Finance cost	Combine debt, use lower interest on EUR 400m		$ 6m
SCM	Use Foxconn supply chain „PSL“ partners, 2% improvement, supply security		$ 10m
Total	Synergies split 50:50 between ENN and Kontron		$84m

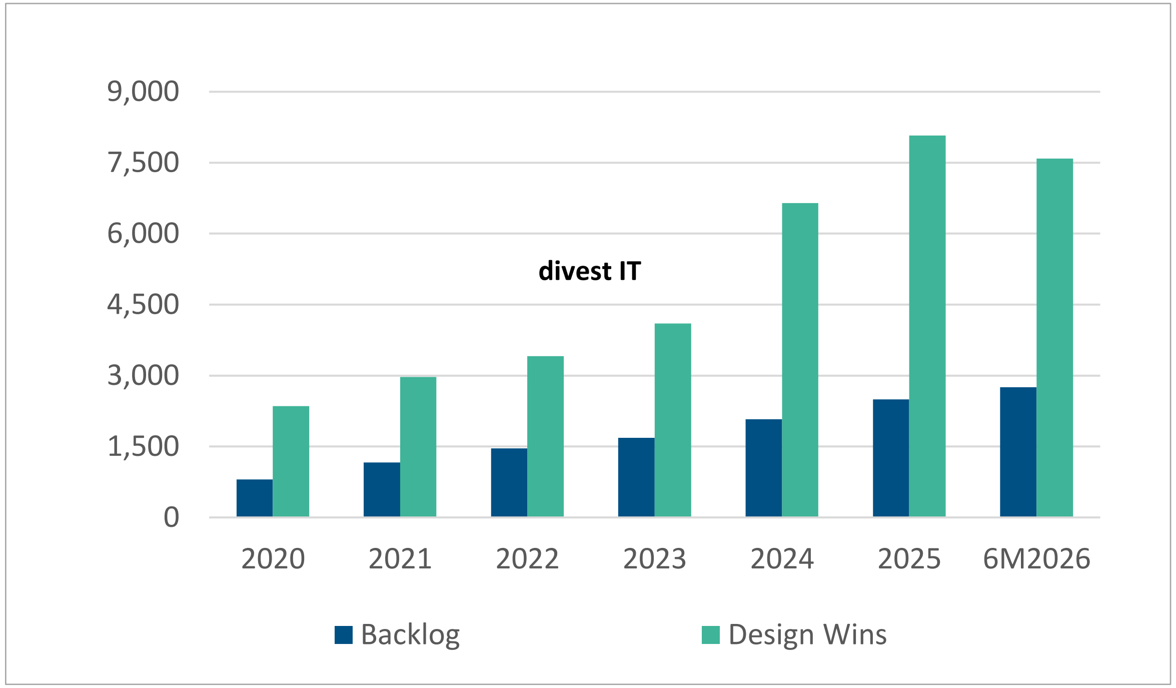
Ennoconn's long-term Commitment to Kontron Partnership

- Ennoconn Corporation (6414.TW) has increased its shareholding and Kontron and launched a mandatory tender offer on 29 June. The deadline for the acceptance period was 27 July.
- With the acceptance rate below 20% Ennoconn will not hold the majority of the voting rights following completion of the transaction.
- Shareholders retain the right to withdraw their acceptance until all required regulatory approval (FDI) has been obtained. The final participation rate will be determined following completion of the regulatory review process and might still change in the course of the following weeks.
- The tender offer represents an important milestone after 10 years in a partnership where Ennoconn held around 28%. The largest shareholders of Ennoconn are Foxconn and Google.
- Ennoconn sees the momentum and potential for Kontron's development in the industry, hence Ennoconn decided to take a more forward-looking long-term investment strategy.

History and 2026 Forecast

Continuous Strong Organic Growth in Profitability Expected





(in EUR million)	Results 2024	Results 2025	Guidance 2026
Revenue	1,685	1,607	In range of 2025*
EBITDA adj.	192	220	225**

* 8% organic growth, includes deconsolidation of EUR 75m. M&A uncertain in current environment, not forecasted anymore.
** Before EUR 25m of restructuring costs but Incl. effect of chip crisis.

Appendix

The Kontron Share

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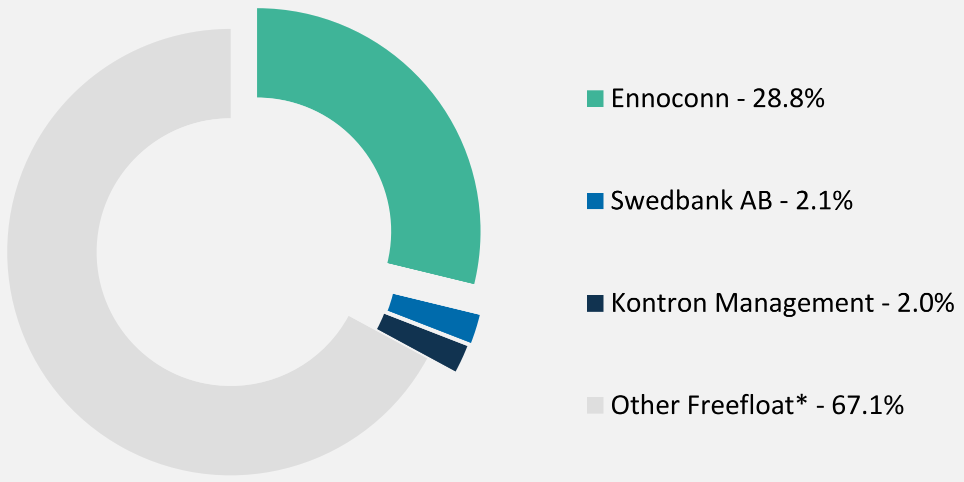
Price target clearly above current share price

Shareholder Structure



Shareholder base

Analyst Recommendations

Cantor Fitzgerald	Buy: EUR 34.00
Jefferies	Buy: EUR 27.00
ERSTE Group	Buy: EUR 30.90
Kepler Cheuvreux	Buy: EUR 30.00
mwb research	Buy: EUR 35.00
ODDO BHF	Hold: EUR 23.50
Pareto Securities	Buy: EUR 28.00
Warburg	Buy: EUR 28.50
Bankhaus Metzler	Buy: EUR 30.00
DZ Bank	Buy: EUR 31.00
Average Target Share Price	**EUR 29.79**

Share ID as of 31/03/2026
* incl. 2.0% Treasury Shares
** Latest Analysts' recommendation change as of 05.08.2026

Update on ESG: Achievements

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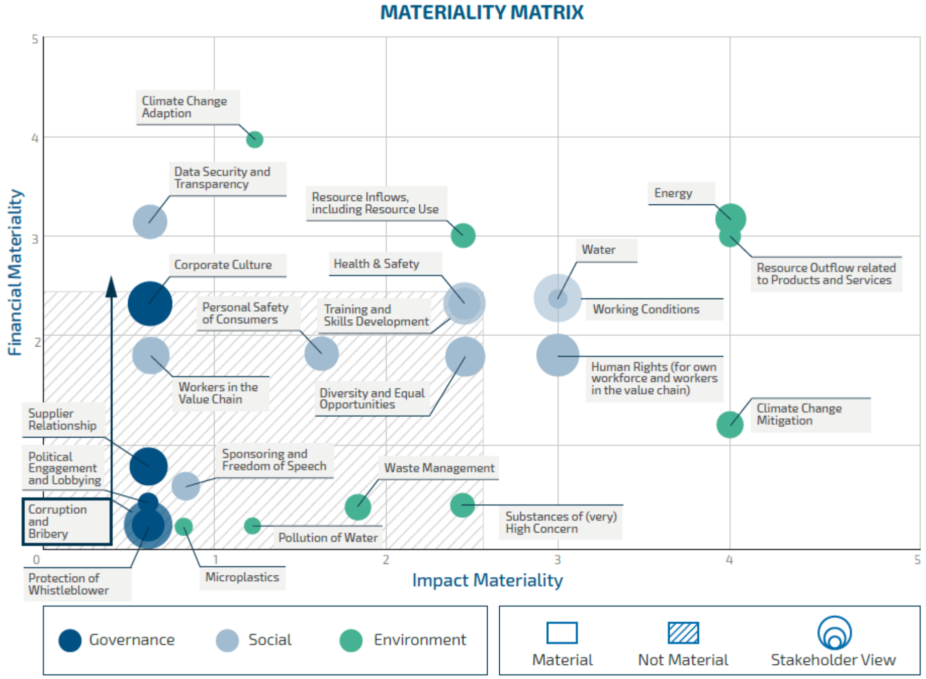
Recognition of Kontron’s ESG efforts

- MSCI: A (previously BBB)
- EcoVadis: 50 (rated above industry average)
- Sustainalytics: 17.9 (low risk)
- Moody’s: 38 (improvement by 4 points since 2022)
- ISS ESG: C (previously C-)



- Double Materiality Analysis (CSRD requirement) was completed – 10 material topics identified
- Education
  Kontron Sustainable Leadership Academy 2024 (focus on female employees)
  Data Security Training Focus
- Employee Survey – conducted among approx. 4,700 employees

Update on ESG: Outlook & Targets

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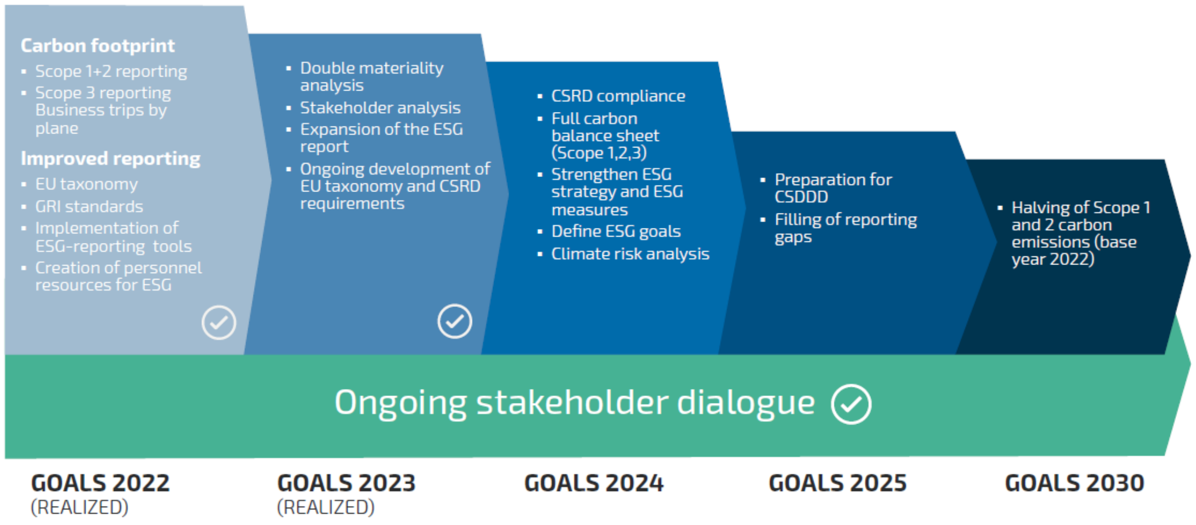
- Corporate Carbon Footprint (Full disclosure on Scope I, II, III)
- Climate Risk Analysis
- EU Taxonomy alignment
- CSRD compliance – Sustainability Statement 2024 (ESRS) based on Double Materiality Analysis
- Kontron's Green Products – communicating our products better (product carbon footprint)
- Kontron's Green Products – Connecting sustainable Energy and ESG for higher performance
- GreenTec – Upgrading GreenTec with IoT
- CSDDD preparation
- Compliance targets – update of policies (Supplier Code of Conduct, Code of Conduct, etc), increase in number of participants and participation rate of compliance trainings, integration of acquired companies



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