




Q1 2026 Results Presentation

14 May 2026



 **FILA GROUP** | COLOURING THE FUTURE SINCE 1920.

FILA GROUP

Agenda

1. **Highlights**
2. **Business Review**
3. **Financial Review**
4. **DOMS Industries**








Appendices:

1. **Details on EBITDA**
2. **Exchange rates**



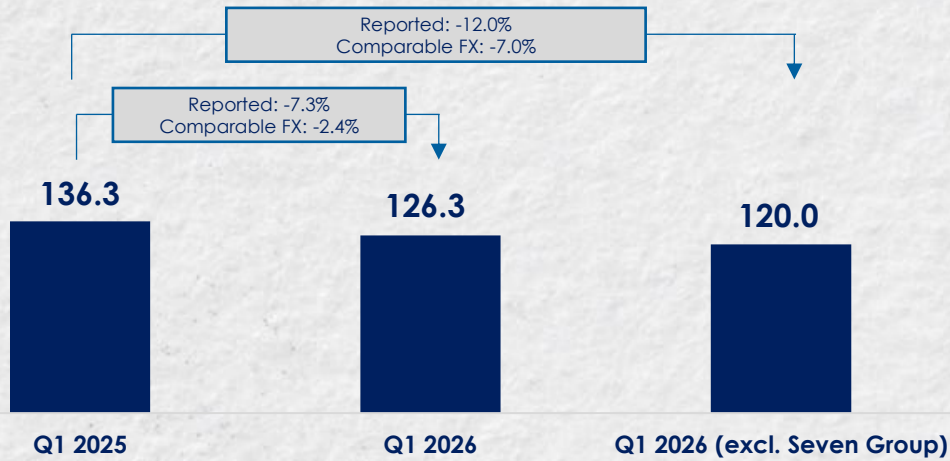
Q1 2026 Results Highlights

Q1 2026 Results

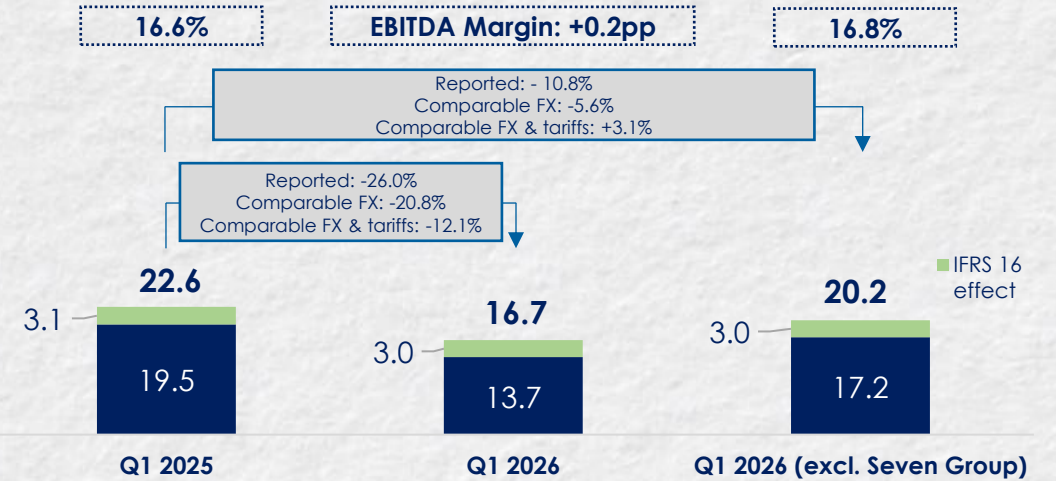
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FILA's Q1 2026 results, in line with budget expectations, reflect progressive shift in FILA business seasonality to middle quarters of the year, also considering the consolidation of Seven Group, characterized by low seasonality of revenues and negative EBITDA contribution in Q1. On an organic basis, and excluding the negative impacts related to tariffs, the Group's EBITDA increased despite the still challenging market environment
- 
Core Business Sales Q1 2026 reached €126.3m, including €6.3m of Seven Group contribution, reflecting the weakness of €/\$. Core Business Sales excluding Seven Group at €120.0m (-7.0% on a comparable FX) chiefly reflecting the shift of orders towards Q2 in North America and Europe, the latter as a result of the new commercial strategy
- 
Adjusted EBITDA Q1 2026 totaled €16.7m, including -€3.4m of negative Seven Group contribution. Adjusted EBITDA excluding Seven Group stood at €20.2m (-5.6% on a comparable FX basis, +3.1% on a comparable FX and tariffs basis), with a slightly improved margin vs Q1 2025 (16.8% vs 16.6%), thanks to better sales mix and cost containment
- 
Adjusted Group Net Profit Q1 2026 reached €4.5m. Adjusted Group Net profit excluding Seven Group stood at €7.4m, improving from €0.9m in Q1 2025, driven by lower net financial expenses at -€1.1m vs -€9.9m in Q1 2025, reflecting a positive €8.9m variation in financial FX impacts between Q1 2026 and Q1 2025
- 
Free Cash Flow to Equity Q1 2026 amounted to -€56.7m. Excluding Seven Group cash absorption FCFE stood at -€48.9m improving vs -€55.5m in Q1 2025
- 
Net Bank Debt Q1 2026 at -€252.9m, with €76.2m increase vs Q1 2025 as a result of the acquisition of Seven Group (-€54.9m of total consideration), Seven Group Net Bank Debt (-€11.2m) and dividends (-€42.0m)
- 
Outlook 2026: YTD order in line with the best expectations for the year. 2026 guidance remains unchanged, pointing to double-digit growth both in Revenues and Adjusted EBITDA. Free Cash Flow to Equity is expected between €40-50m, in the ordinary course

Snapshot – Q1 2026

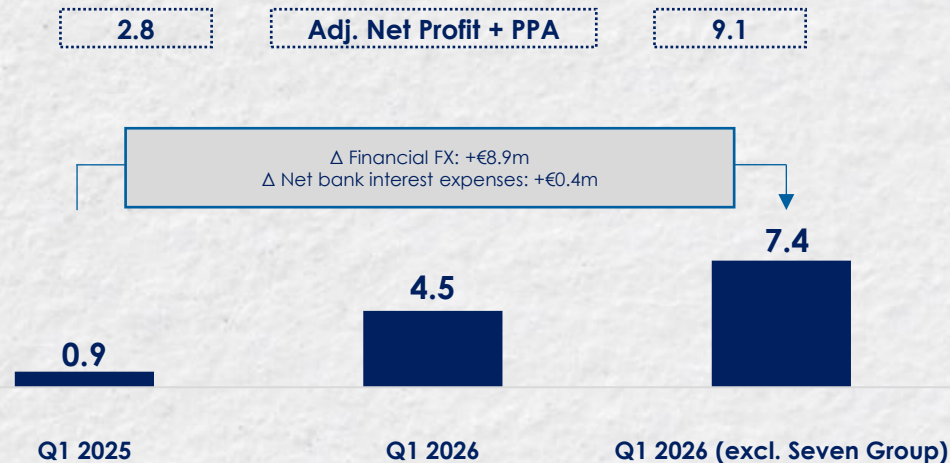
Core Business Sales (€m)



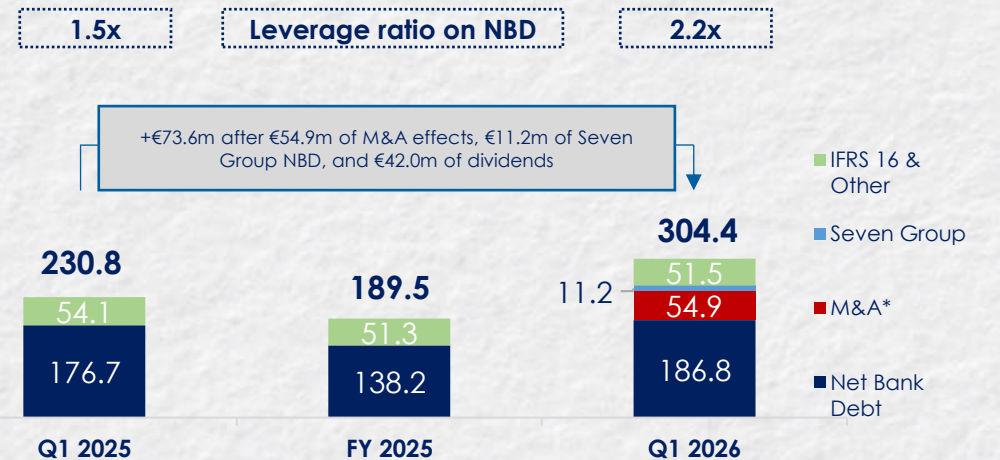
Adjusted EBITDA (€m)



Adjusted Group Net Profit (€m)



Net Financial Position/Net Bank Debt (€m)

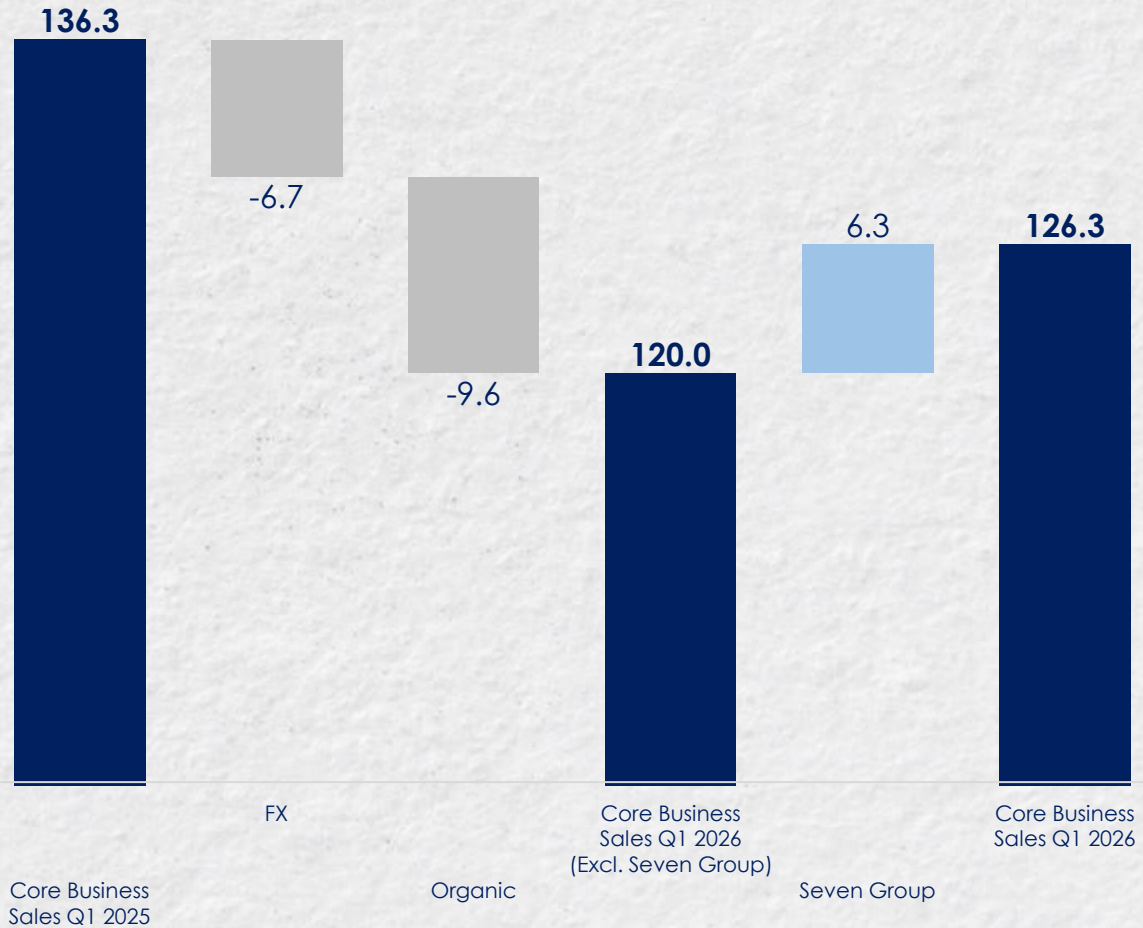


Note: Net Profit not including DOMS contribution

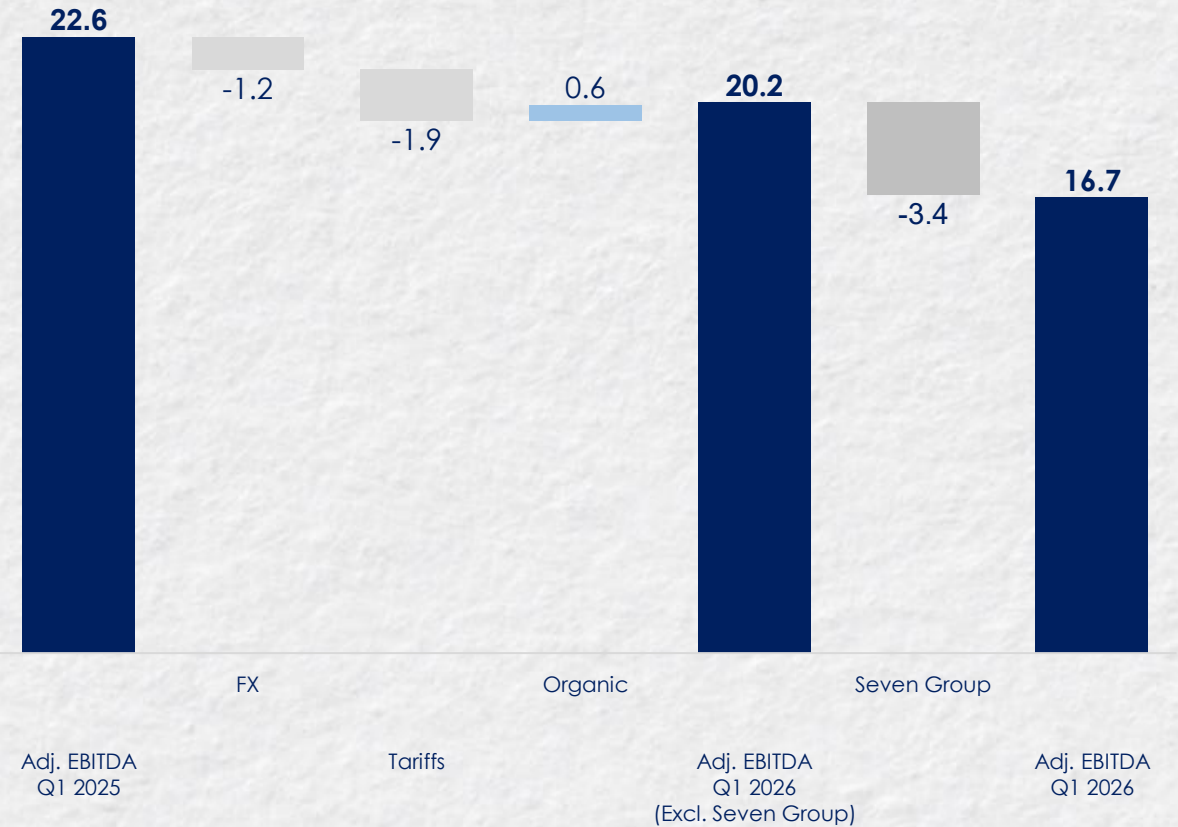
*including M&A advisory costs

Core Business Sales and Adjusted EBITDA Evolution

Core Business Sales Evolution (€m)

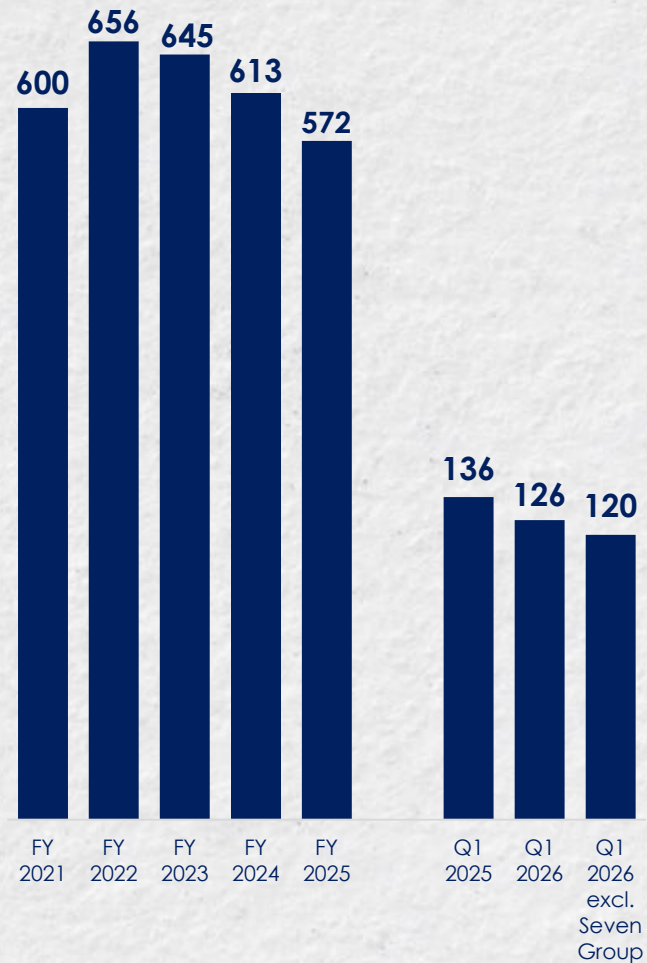


Adjusted EBITDA Evolution (€m)

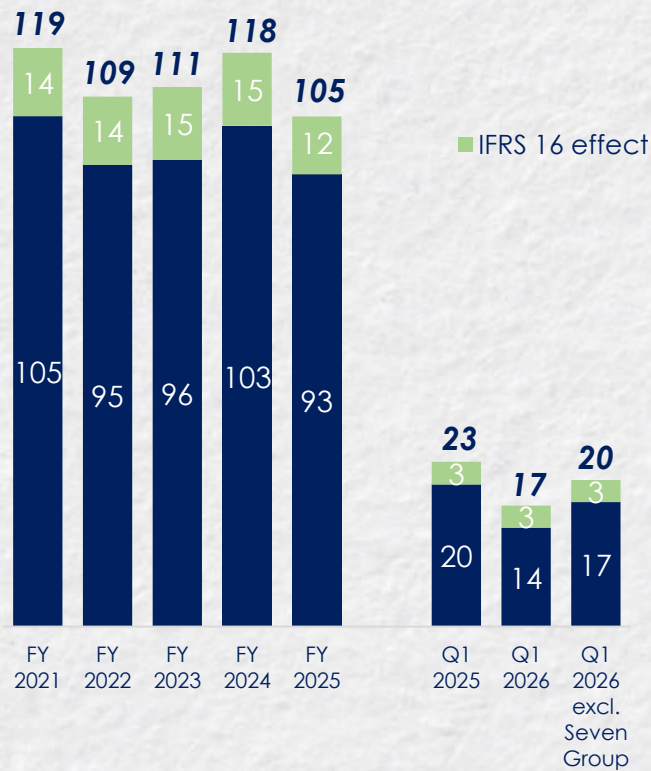


Consistent Cash Flow Generation over the years

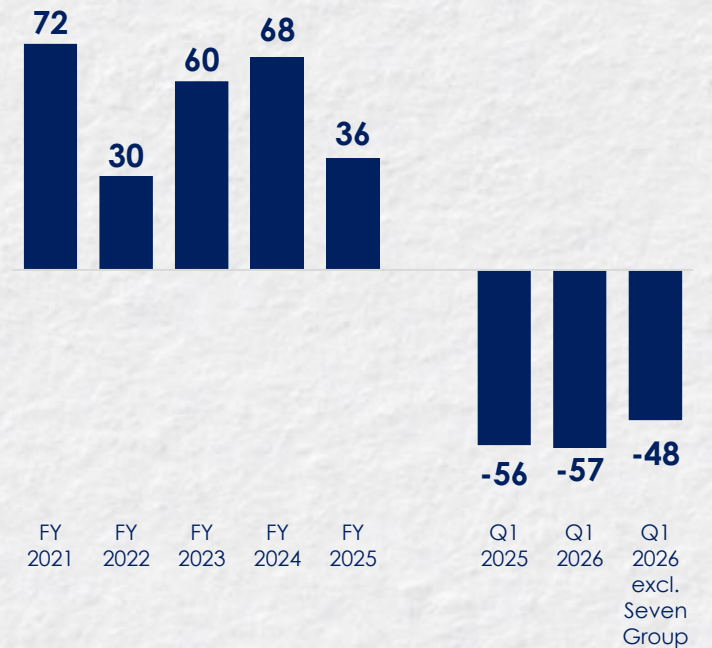
Core Business Sales (€m)



Adjusted EBITDA (€m)



Free Cash Flow to Equity (€m)



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Core Business Sales

	Q1 2025	Q1 2026	Delta (€)	Comparable FX	Q1 2025	Q1 2026 excl. Seven Group	Delta (€)	Comparable FX
Total Fila Group	136.3	126.3 ⁽¹⁾	-10.0m -7.3%	-3.3m -2.4%	136.3	120.0	-16.3m -12.0%	-9.6m -7.0%
 North America	63.5 (47%)	54.3 (43%)	-9.2m -14.5%	-3.3m -5.2%	63.5 (47%)	54.3 (45%)	-9.2m -14.5%	-3.3m -5.2%
 Europe	52.4 (38%)	52.7 ⁽¹⁾ (42%)	+0.3m +0.6%	+1.0m +1.9%	52.4 (38%)	46.4 (39%)	-6.0m -11.4%	-5.3m -10.1%
 C&SA	16.5 (12%)	16.2 (13%)	-0.3m -1.9%	-0.3m -1.7%	16.5 (12%)	16.2 (13%)	-0.3m -1.9%	-0.3m -1.7%
 Asia	3.0 (2%)	2.1 (2%)	-0.9m -31.5%	-0.8m -26.9%	3.0 (2%)	2.1 (2%)	-0.9m -31.5%	-0.8m -26.9%
 RoW	0.9 (1%)	1.0 (1%)	+0.1 +13.2%	+0.1m +13.1%	0.9 (1%)	1.0 (1%)	+0.1 +13.2%	+0.1m +13.1%

⁽¹⁾ Including €6.3m of Seven Group

Key Highlights






Core Business Sales Q1 2026 results at €126.3m, including €6.3m of Seven Group contribution. **Core Business Sales excluding Seven Group at €120.0m** (-7.0% on a comparable FX)

North America Q1 2026 results at €54.3m, -5.2% on a comparable FX basis due to the shift of orders towards Q2, mainly for better distribution services

Europe Q1 2026 results at €52.7m with +1.9% on a comparable FX basis, reflecting Seven Group Acquisition. **Core Business Sales excluding Seven Group** stood at €46.4m, -10.1% on a comparable FX basis, mainly due to the shift of orders towards Q2, as a result of the new commercial strategy

C&SA Q1 2026 results at €16.2m, -1.7% on a comparable FX basis, showing stabilization after a weak H2 2025

Adjusted EBITDA

	Q1 2025	Q1 2026	Delta (%)	2025 Margin	2026 Margin		Q1 2025	Q1 2026 excl. Seven Group	Delta (%)	2025 Margin	2026 Margin
Total Fila Group	22.6	16.7 ⁽¹⁾	-26.0%	16.6%	13.2%		22.6	20.2	-10.8%	16.6%	16.8%
 North America	10.1	10.8	+7.4%	15.9%	19.9%		10.1	10.8	+7.4%	15.9%	19.9%
 Europe	7.9	3.0 ⁽²⁾	-61.3%	15.0%	5.8%		7.9	6.5	-17.2%	15.0%	14.0%
 C&SA	3.3	2.4	-26.7%	20.2%	15.1%		3.3	2.4	-26.7%	20.2%	15.1%
 Asia	1.2	0.4 ⁽³⁾	-71.2%	40.2%	16.9%		1.2	0.3	-74.3%	40.2%	15.1%
 RoW	0.1	0.1	-36.4%	13.4%	7.5%		0.1	0.1	-36.4%	13.4%	7.5%

Key Highlights

Adjusted EBITDA in Q1 2026 at €16.7m, including -€3.4m of negative contribution from Seven Group, characterized by low revenue seasonality in Q1. **Adj. EBITDA excluding Seven Group in Q1 2026 at €20.2m**, +3.1% on a comparable FX and tariff basis (of which -5.6% FX and -8.4% tariff impact⁽⁴⁾)

Adjusted EBITDA margin excluding Seven Group slightly improved vs Q1 2025 (16.8% vs 16.6%), thanks to better sales mix and cost containment (-11% vs Q1 2025)

North America EBITDA at €10.8m (+7.4% vs Q1 2025) with **EBITDA margin at 19.9%**, strongly improved **vs 15.9% in Q1 2025** thanks to price increase and continuous efficiencies

Europe EBITDA ex Seven Group in Q1 2026 at €6.5m (-17.2% vs Q1 2025) with 14.0% margin vs 15.0% due to temporary lower revenues

CS&A EBITDA at €2.4m (-26.7% vs Q1 2025), due to worse sales mix and tough comparison vs Q1 2025

⁽¹⁾ Including -€3.4m of Seven Group

⁽²⁾ Including -€3.5m of Seven Group

⁽³⁾ Including €0.04m of Seven Group

⁽⁴⁾ €1.9m loss for extraordinary US tariffs on 2025 inventory sold in Q1 2026

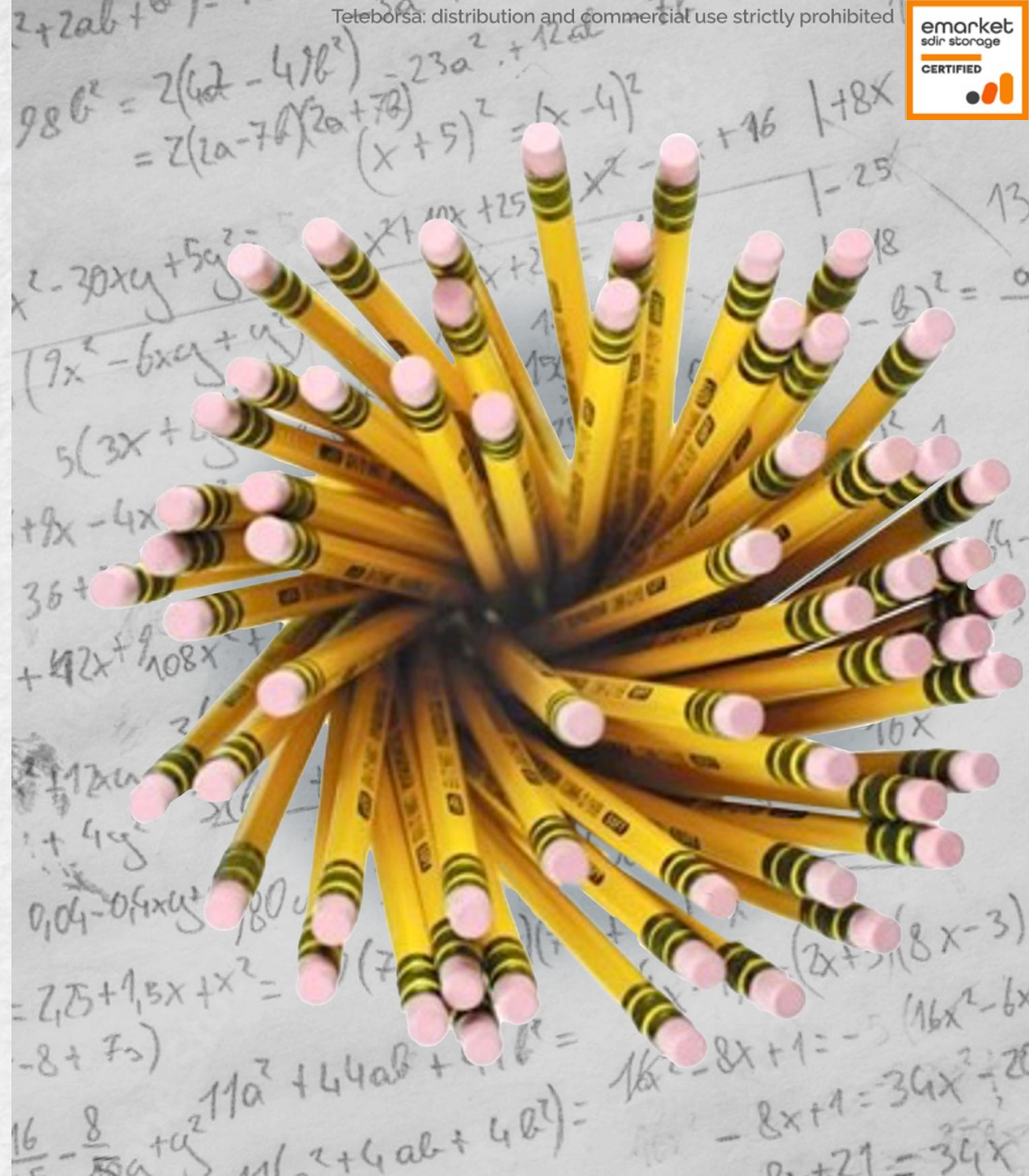


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Adjusted Income Statement

(€ million)	Q1 2025	Q1 2026	Change	Of which Seven Group
Core Business Sales	136.3	126.3	-10.0	6.3
Other revenues	2.4	3.0	0.6	0.2
Total Revenues	138.7	129.3	-9.4	6.5
Cost for Raw Materials and Supplies and net increase (decrease) in Inventory	-55.4	-47.8	7.6	-3.8
Costs for Services and Use of Third-Party Assets	-25.1	-28.3	-3.2	-4.0
Personnel Costs	-33.7	-34.7	-1.0	-2.0
Other Operating Costs	-1.9	-1.8	0.1	-0.1
Adjusted EBITDA	22.6	16.7	-5.9	-3.4
Depreciation & Amortisation	-8.3	-8.3	0.0	-0.5
Write-Downs	-1.4	-0.5	0.9	-0.1
EBIT	12.9	7.9	-5.0	-4.0
Financial income/expenses	-9.9	-1.1	8.8	-0.2
Income/expenses from associates at equity method	0.0	0.0	0.0	0.0
PBT	3.0	6.8	3.8	-4.3
Taxes	-1.6	-2.0	-0.4	1.3
Adjusted Net Profit (Loss)	1.3	4.8	3.5	-2.9
Adjusted Group Net Profit (Loss)	0.9	4.5	3.6	-2.9
Adjustments for Non-Recurring Items to EBITDA	-0.9	-2.5	-1.6	-0.3
Adjustments for Non-Recurring Items to Group Net Profit	-1.4	-2.3	-0.9	-0.3

Key Highlights

Adjusted Group Net Profit at €4.5m in Q1 2026 (€0.9m in Q1 2025)

D&A stood at €8.3m in Q1 2026, flat vs Q1 2025

PPA amortization was equal to €2.3m in Q1 2026 (stable vs last year)

Write-Downs decreased to -€0.5m in Q1 2026

Financial Income/ Expenses at -€1.1m in Q1 2026 (-€9.9m in Q1 2025) including +€3.3m of foreign exchange effects (-€5.6m in Q1 2025) and -€3.4m of net interest expenses including IFRS 16 (-€3.8m in Q1 2025)

Income from associates relates to DOMS, not yet made public for Q1 2026 and kept at zero, in line with Q1 2025

Adjustments for Non-Recurring Items mainly related to M&A advisory costs and the performance shares incentive plan

Cash Flow Statement

(€ million)	Q1 2025	Q1 2026	Change
Adjusted EBITDA	22.6	16.7	-5.9
Changes in net working capital	-59.7	-61.4	-1.7
Investments in tangible and intangible assets	-3.1	-3.7	-0.7
Operating Cash Flow	-40.2	-48.4	-8.3
IFRS 16 rent payments	-3.2	-3.1	0.1
Tax payments	-1.7	-2.7	-1.0
Net financial expenses	-3.3	-2.3	1.1
Net financial expenses IFRS 16	-0.8	-0.8	0.0
Non-monetary costs and other changes	-5.5	3.0	8.4
Adjusted Free Cash Flow to Equity	-54.7	-54.3	0.4
Adjustments for Non-Recurring Items	-0.9	-2.5	-1.6
Reported Free Cash Flow to Equity	-55.5	-56.7	-1.2
Buybacks/ dividends	-	0.1	0.1
Effect of FX rate movements	3.5	0.2	-3.3
Changes in amortised cost and MTM	-0.5	-0.8	-0.3
Changes in IFRS 16 Net Financial Position	2.9	0.7	-2.3
M&A effects & related advisory costs	-	-54.9	-54.9
Changes due to variation in Consolidation Area	-0.1	-3.4	-3.3
Changes in Reported Net Financial Position	-49.7	-114.8	-65.1

Key Highlights

Free Cash Flow to Equity Q1 2026 amounted to -€56.7m, in line with Q1 2025, despite **€7.8m of Seven Group cash absorption**

Change in Net Working Capital amounted to -€61.4m due to the business seasonality, in line with Q1 2025

Capex at €3.7m vs €3.1m in Q1 2025 following industrial developments

Tax payments at -€2.7m vs -€1.7m in Q1 2025

Net financial expenses at -€2.3m improving vs -€3.3m in Q1 2025, thanks to financial efficiencies

Change in Reported Net Financial Position was equal to -€114.8m in Q1 2026 after -€56.7m of Free Cash Flow to Equity

Net Bank Debt & Net Financial Position

(€ million)	Q1 2025	FY 2025	Q1 2026	Change	Of which Seven Group
Cash and Cash Equivalents	124.5	112.7	87.1	-37.4	10.2
Financial Liabilities and Receivables	-301.2	-250.9	-339.9	-38.8	-21.4
Net Bank Debt	-176.7	-138.2	-252.9	-76.2	-11.2
Amortized Cost	4.7	2.6	2.3	-2.3	0.3
Net Financial Position excl. IFRS 16 and MtM Hedging	-172.0	-135.6	-250.6	-78.5	-10.9
Mark to Market Hedging	-1.5	-1.1	-1.6	-0.2	-1.6
IFRS 16	-57.4	-52.8	-52.2	5.2	-0.5
IFRS 16 Net Financial Position	-230.8	-189.5	-304.4	-73.5	-12.9
<i>LTM Adjusted EBITDA</i>	119.7	105.2	115.9		
Leverage ratio on Net Bank Debt	1.5x	1.3x	2.2x		
Leverage ratio on IFRS 16 Net Financial Position	1.9x	1.8x	2.6x		

Key Highlights

Net Bank Debt at -€252.9m in Q1 2026, with €76.2m increase vs Q1 2025 as result of the acquisition of Seven Group (€54.9m of total consideration), Seven Group Net Bank Debt (€11.2m), and dividends (€42.0m)

Reduction of €5.2m IFRS 16 debt thanks to efficiencies on the cost of leased production facilities in Mexico, USA and China

Leverage Ratio at 2.2x in Q1 2026, increasing vs 1.5x in Q1 2025, as a result of Seven Group acquisition

Reported Balance Sheet

(€ million)	Q1 2025	FY 2025	Q1 2026	Change	Of which Seven Group
Intangible Assets	364.7	338.8	372.7	8.0	18.3
Tangible Assets	104.9	103.3	105.0	+0.1	2.0
Financial Fixed Assets	140.5	143.7	143.3	2.8	0.0
Fixed Assets	610.1	585.8	621.0	10.9	20.3
Other Non Current Asset/Liabilities	20.2	23.4	25.6	5.4	3.0
Trade Receivables	128.8	90.8	151.0	22.2	24.3
Inventories	270.9	227.3	269.4	-1.5	17.1
Trade Payables	-104.0	-94.0	-105.3	-1.3	-9.9
Trade Working Capital	295.6	224.1	315.2	19.5	31.5
Other Current Asset and Liabilities	-0.3	5.8	6.4	6.8	0.3
Net Working Capital	295.3	230.0	321.6	26.3	31.8
Provision & Funds	-71.1	-69.9	-71.7	-0.7	-1.8
Net Capital Employed	854.6	769.2	896.5	41.9	53.3
Shareholders Equity	-623.8	-579.7	-592.1	31.7	-40.4
IFRS 16 Net Financial Position	-230.8	-189.5	-304.4	-73.5	-12.9
Total Net Sources	-854.6	-769.2	-896.5	-41.9	-53.3
<i>Trade Working Capital</i>	295.6	224.1	315.2	19.4	
<i>LTM reported Sales</i>	617.0	572.2	635.9	18.9	
Trade Working Capital % LTM Sales	47.9%	39.2%	49.6%		

Key Highlights

Intangible Asset at €372.7m, increased of €8.0m, mainly reflecting Seven Group Goodwill (€13.6m) and Trademarks (€18.1m)

Financial Fixed Assets largely composed of FILA's 26.01% stake in DOMS for €142.6m under the equity method

Shareholder Equity at €592.1m, equal to €11.6 per share

Trade Working Capital increases to €315.2m, with a percentage of sales at **49.6% in Q1 2026** from 47.9% in Q1 2025

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DOMS Industries Market Data

DOMS Consensus Results and Broker Recommendations

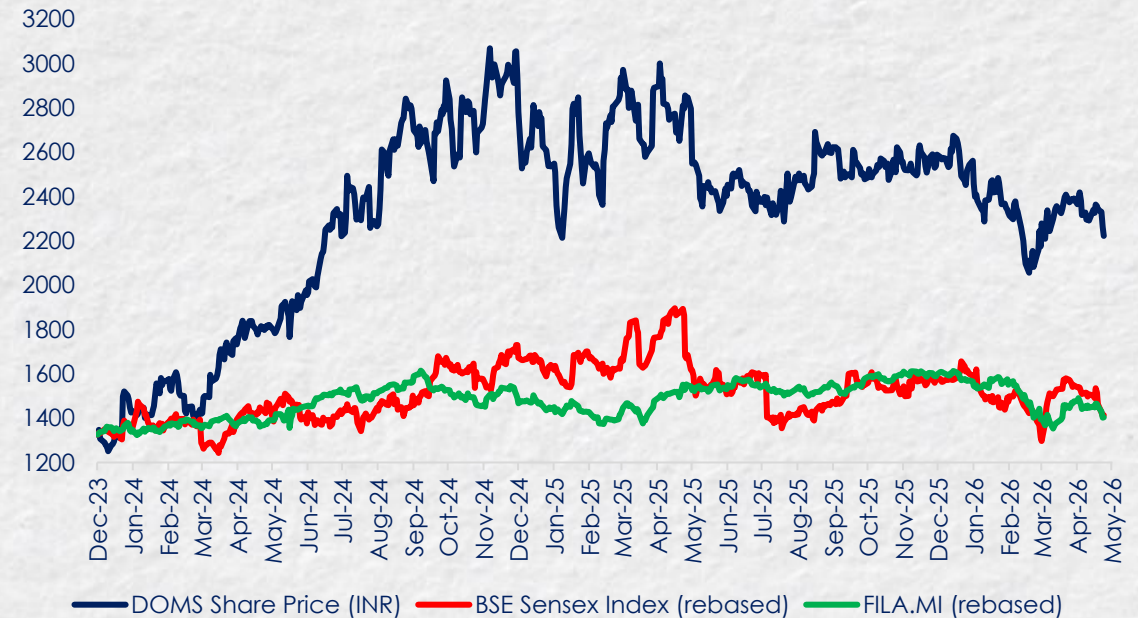
(source: FactSet, May 13^o, 2026)

INR millions	2025A*	2026E	2027E	2028E
Sales	19,126	23,201	27,911	33,523
EBITDA	3,484	4,049	4,863	5,937
EBIT	2,793	3,198	3,794	4,642
Net Income	2,090	2,371	2,798	3,501

BrokerA	Rating Date	Rating	Target Price (INR)
Ambit Capital	16 Apr '26	Sell	2,401.00
Restricted	09 Apr '26	Buy	2,950.00
Nirmal Bang	08 Apr '26	Buy	2,820.00
Prabhudas Lilladher	07 Apr '26	Buy	2,889.00
ICICI Securities	13 Mar '26	Buy	2,500.00
IIFL Research	02 Feb '26	Overweight	2,750.00
Antique Stockbroking	02 Feb '26	Buy	3,186.00
East India Securities	02 Feb '26	Overweight	2,771.00
Nuvama Institutional Equities	30 Jan '26	Buy	3,555.00
B & K Securities	30 Jan '26	Buy	2,856.00
JM Financial Institutional Securities	30 Jan '26	Buy	2,690.00
Asian Markets Securities	30 Jan '26	Buy	2,900.00
Average	/	/	2,855.67

* Note: DOMS Industries fiscal year falls on 31 March

DOMS Industries Share Price Performance



DOMS Share Price on 13 May, 2026 (INR)	2,222.00
DOMS Market Cap (INR bn)	134.85
FILA Stake (%)	26.01%
FILA Stake (INR bn)	35.08
EUR/INR	111.92
FILA Stake (€m)	313.38
FILA Market Cap (€m)	445.23

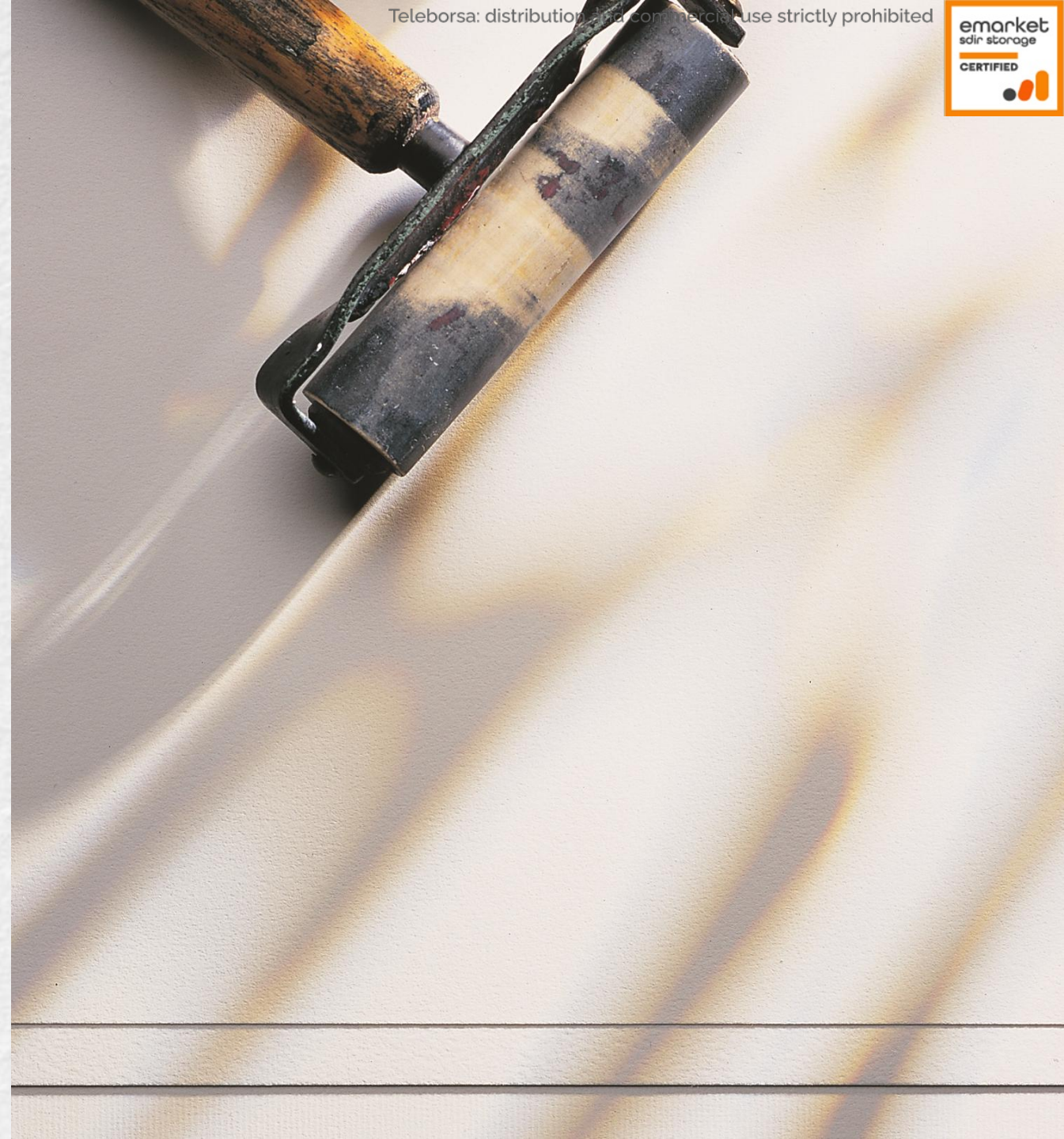
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







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Adjusted EBITDA

	Q1 2025	Q1 2026	2025 Margin	2026 Margin	Delta (€)		Q1 2025	Q1 2026 excl. Seven Group	2025 Margin	2026 Margin	Delta (€)
Total Fila Group	 22.6 19.5	 16.7 13.7	16.6% 14.3%	13.2% 10.9%	-5.9m -5.8m		 22.6 19.5	 20.2 17.2	16.6% 14.3%	16.8% 14.4%	-2.4m -2.3m
 North America	 10.1 8.9	 10.8 9.6	15.9% 13.9%	19.9% 17.7%	+0.7m +0.8m		 10.1 8.9	 10.8 9.6	15.9% 13.9%	19.9% 17.7%	+0.7m +0.8m
 Europe	 7.9 7.0	 3.0 2.2	15.0% 13.4%	5.8% 4.3%	-4.9m -4.8m		 7.9 7.0	 6.5 5.8	15.0% 13.4%	14.0% 12.5%	-1.4m -1.2m
 C&SA	 3.3 2.7	 2.4 1.5	20.2% 16.4%	15.1% 9.4%	-0.9m -1.2m		 3.3 2.7	 2.4 1.5	20.2% 16.4%	15.1% 9.4%	-0.9m -1.2m
 Asia	 1.2 0.9	 0.4 0.3	40.2% 28.5%	16.9% 13.6%	-0.8m -0.6m		 1.2 0.9	 0.3 0.2	40.2% 28.5%	15.1% 11.8%	-0.9m -0.6m
 RoW	 0.1 0.1	 0.1 0.0	13.4% 8.0%	7.5% 2.4%	0.0m -0.1m		 0.1 0.1	 0.1 0.0	13.4% 8.0%	7.5% 2.4%	0.0m -0.1m

 Adjusted EBITDA Including IFRS 16

 Adjusted EBITDA Excluding IFRS 16


Exchange Rates (source: Bank of Italy)

Currency		Avg 3M 25	Avg 3M 26	31/03/2025	31/12/2025	31/03/2026
Argentinean Peso	ARS	1,110.74	1,660.94	1,158.15	1,707.56	1,606.44
Australian Dollar	AUD	1.68	1.68	1.73	1.76	1.67
Brazilian Real	BRL	6.16	6.16	6.25	6.44	6.01
Canadian Dollar	CAD	1.51	1.61	1.55	1.61	1.60
Swiss Franc	CHF	0.95	0.92	0.95	0.93	0.92
Chilean Peso	CLP	1,013.11	1,036.04	1,028.51	1,058.13	1,071.69
Renminbi Yuan	CNY	7.66	8.11	7.84	8.23	7.93
Dominican Peso	DOP	65.40	72.39	68.44	74.14	69.62
UK Pound	GBP	0.84	0.87	0.84	0.87	0.87
Hong Kong Dollar	HKD	0.00	9.15	0.00	0.00	9.01
Indonesian Rupiah	IDR	17,217.87	19,738.22	17,992.97	19,640.83	19,506.24
Shekel	ILS	3.80	3.65	4.03	3.75	3.64
Indian Rupee	INR	91.16	107.12	92.40	105.60	107.88
Mexican Peso	MXN	21.50	20.55	22.06	21.12	20.71
Nuevo Sol	PEN	3.96	3.96	4.02	3.95	4.02
Polish Zloty	PLN	4.20	4.23	4.18	4.22	4.29
Russian Ruble	RUB	98.54	91.94	91.59	93.61	93.98
Swedish Krona	SEK	11.23	10.69	10.85	10.82	10.94
Turkish Lira	TRY	38.22	51.17	41.04	50.48	51.14
US Dollar	USD	1.05	1.17	1.08	1.18	1.15
South African Rand	ZAR	19.46	19.13	19.88	19.44	19.63

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