5 April 2023

AUTOW
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PRIME MARKET
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Investor presentation

Results for 2022

We are building the leading car dealership and mobility service provider in the Central and Eastern European region

AutoWallis
GROUP

Disclaimers

This investor presentation is based on the Company's consolidated financial statements for 2022 prepared in accordance with the International Financial Reporting Standards endorsed by the EU (EU IFRS). The information contained in this presentation has not been audited and has not been reviewed by an independent auditor.

This investor presentation contains forward-looking statements and prospective statements on the Company's opinions and expectations, which are presented by the Company in good faith and in a reasonable manner. Such forward-looking statements rely on current plans, expectations and projections and may be affected by known or unknown risks, uncertainties or other factors which may cause the specific results, financial situation, performance or achieved goals of the Company or the industry to differ significantly from those explicitly or implicitly described in such forward-looking statements.

The Company will not be held liable for updating or modifying any such statement on the basis of new information or future events and for publishing such modifications. Therefore, having regard to such risks, uncertainties and other factors, we advise investors not to rely solely upon these forward-looking statements when making investment decisions.

The Company's financial figures relating to this investor presentation are also published in detail on the Company's website in a format that facilitates their use. The detailed financial data are available at: https://www.autowallis.hu/hu/befektetoknek/kozzetetelek

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AutoWallis GROUP

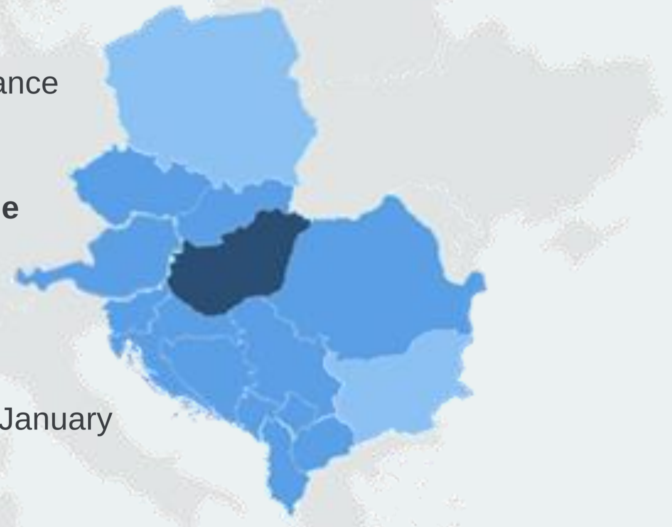
1. Executive Summary

Key events in Q4

We are making progress implementing our previously announced growth strategy

Events in 2022Q4 (the key events in Q1 to Q3 are presented in the Company's investor presentation for Q1 to Q3)

- The acquisition of Renault Hungária was completed, and **the exclusive Hungarian import of the Renault, Dacia and Alpine brands began in October 2022 under new ownership.**
- **In November 2022, the Group purchased a significant number of treasury shares** (5 million units) in order to finance acquisitions and for the ESO program.
- **In November 2022,** the Group announced the **acquisition of the fleet management business** of Nelson Group. **The transaction was completed in January 2023.**



Events after the balance sheet date

- The **acquisition** of Net Mobilitás Zrt., the operator of the websites **JóAutók.hu and AutóLicit.hu**, was completed in January 2023.
- The transaction was completed at the end of January 2023, and the Group acquired **the fleet management business of Nelson Group** following approval by the Competition Authority.
- Obtaining ESG certification is a particularly important and strategic goal for the Company. As an important milestone, the Company **published its first Sustainability Report on March 20, 2023**.

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Key results in 2022

Record-breaking results once again, which continue to provide a solid basis for achieving strategic goals

VEHICLES SOLD	REVENUE	EBITDA	EPS
31,303 units	**HUF 270 billion**	**HUF 14,5 billion**	**HUF 19.3 / share**
+25% vs 2021	**+39%** vs 2021	**+84%** vs 2021	vs **+115%** vs 2021

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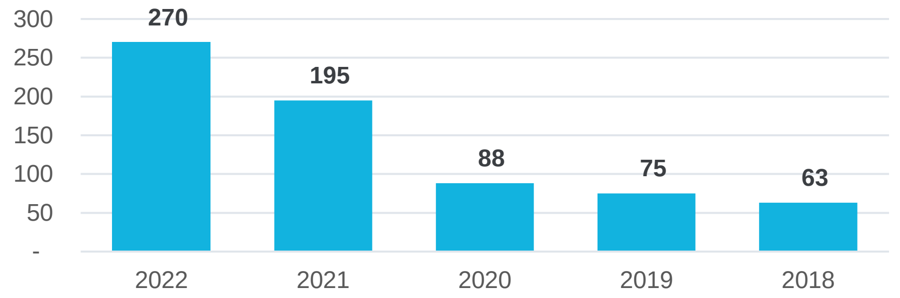
Portfolio

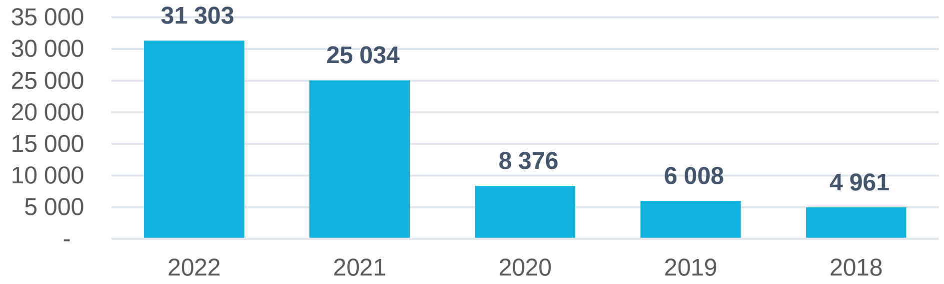
Continuous organic growth supported by growth through acquisitions

Changes in revenue 22FY - 18FY (HUF



Source: the Company's own data

Changes in the vehicle sales 22FY - 18FY (unit)



Source: the Company's own data

Distribution Business Unit

Description	Brands	Countries
Exclusive new car and parts distribution activities in Central and Eastern Europe	ISUZU, JAGUAR, SSANGYONG, LAND ROVER, OPEL, RENAULT, A, DACIA	Hungary, Albania, Croatia, Bosnia and Herzegovina, Serbia, Slovenia, Macedonia, Montenegro, Romania, Slovakia, the Czech Republic, Kosovo, Poland, Bulgaria, Austria*

Retail & Services Business Unit

Description	Brands	Countries
Sale of new and used motor vehicles and motorcycles, as well as sale of new parts	BMW, MINI, Maserati, DACIA, OPEL, LAND ROVER, ISUZU, JAGUAR	Hungary (9 sites), Slovenia (5 sites)
Comprehensive servicing activities and auxiliary services relating to the brands distributed by the Group	NISSAN, SUZUKI, PEUGEOT, KIA, ** JóAutók.hu, RENAULT, TOYOTA, SSANGYONG	
Short-term and long-term car rental and fleet management	SIXT rent a car, NELSON FLOTTALÍZING **	Hungary

* The acquisition of import rights for SsangYong vehicles in Austria became effective in January 2023.
** The transaction was completed in January 2023.

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Economic and market environment

The Group has achieved and expects further growth despite the decline in the region's automotive markets and the unfavourable inflationary and macroeconomic risks

Economic environment

- In 2022, the economic performance of the European Union and Hungary improved compared to the previous year by 3.6% and 4.6%, respectively.
- Inflation and reference interest rates increased considerably worldwide in 2022, including the Group's relevant markets. Coupled with ongoing issues affecting supply chains, this also resulted in a significant rise in the price of new and used cars. The first signs of a negative impact on demand have already been observed when looking at orders for key brands, but deliveries are still determined by supply delays, while the increase in the price levels of motor vehicles and mobility services exceeded the rise in inflation.
- Due to the earlier increase in order volumes caused by supply problems, there may be a longer delay than usual (as many as 6 to 12 months) in seeing a temporary decline in our sales figures.
- However, rising inflation and financing costs, as well as a possible economic downturn are forcing industry players to exercise caution and could act as catalysts for the market consolidation already underway in the industry, which the Group intends to capitalise on through its growth strategy.

Sales and service environment

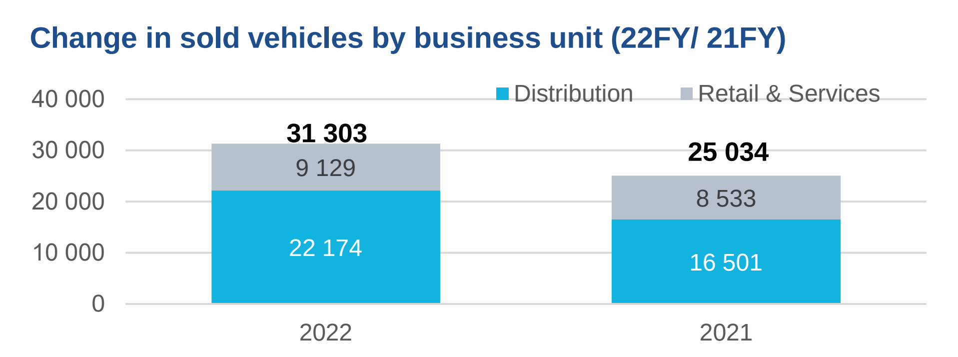
- The war between Russia and the Ukraine which erupted at the beginning of 2022 and the slowdown in production and supply difficulties resulting from the chip shortage significantly reduced the number of cars that were available for delivery in the first half of the year, particularly in Q2. In Q4, the delayed impact of the unavailability of cars in H1 was also observed as a one-off effect. The Group faced uncertainties in deliveries and logistics during the quarter.
- The number of first registrations of new passenger cars declined in EU markets by 5% compared to the same period of the previous year. The number of first registrations of passenger cars in the relevant markets of the Group dropped by an average of 4% in 2022 compared to the same period of the previous year.
- The rise in the number of passengers arriving at the airport, which began last June, continued throughout 2022. The number of passengers is now approaching 80% of the figure for the pre-COVID base of 2019.

* Automotive market data provided by DataHouse and/or ACEA.

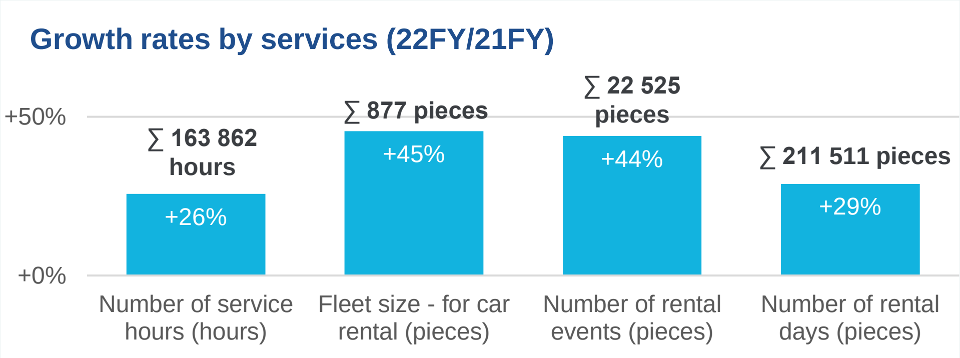
2. Financial and operational summary

Summary of operational performance

The Group achieved record sales significantly exceeding the Hungarian and European market average in 2022



Source: the Company's own data



Source: the Company's own data

- The Group's performance in terms of car sales throughout the year was far above the Hungarian and European market average (Hungary: -9%, Europe: -5%) as **a total of 31,303 vehicles were sold during the year, which represents an increase of 25%**. In addition to the effects of transactions, the continuous rise in sales figures was primarily organic as there was substantial growth (14%) even without the acquisitions of the Slovenian entity Avto Aktiv completed in April and Renault Hungária at the beginning of October.
- In terms of sales, **the largest improvement was achieved by the Distribution Business Unit**, increasing the number of vehicles sold by 34% to 22,174 units. Part of this growth is linked to the acquisition of Renault Hungária in a joint arrangement with the Portuguese entity Salvador Caetano. The acquisition contributed to growth in the last three months of the year (an increase of 1,873 vehicles), along with an organic growth of 23% in the business unit. A significant part of this is attributable to SsangYong as sales of the Korean brand were boosted by 99.4% (3,638 units).
- In 2022, the **Retail & Services Business Unit** sold 7,314 new (+5.7%) and 1,815 used vehicles (+12.5%), which includes the figures of Avto Aktiv starting from Q2. The Slovenian entity sells four car brands in five cities, which makes it a major force in the Slovenian retail market. Without it, the sale of new and used vehicles would have declined by 2.6% and 4.9%, respectively.
- In terms of the **services of the Retail & Services Business Unit**, the number of service hours increased by 25.7% to 163,862, although there was an organic growth of 2.8% even without the acquisition of Avto Aktiv. Sixt, an entity represented in Hungary by AutoWallis Group, increased the number of rental transactions by 43.9% to 22,525 in 2022, while the number of rental days was up by 28.9% to 211,511. Average fleet size grew by 45.4% to 877 last year as a result of the expansion of tourism.

* Market data provided by DataHouse.

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Consolidated profit & loss statement / 1

Outstanding organic revenue growth

HUF ths	2022	2021	Changes %	Changes
Revenue	270 165 925	194 956 435	39%	75 209 490
Distribution business unit	158 935 920	110 864 087	43%	48 071 833
Retail & Services business unit	111 230 005	84 092 348	32%	27 137 657
Material	-5 843 877	-3 764 255	55%	-2 079 622
Services	-12 692 680	-9 497 636	34%	-3 195 044
Cost of goods sold	-224 919 330	-167 486 631	34%	-57 432 699
Personal expenses	-10 931 262	-6 985 429	56%	-3 945 833
Depreciation	-3 440 160	-2 712 690	27%	-727 470
Profit or loss from trading	12 338 616	4 509 794	174%	7 828 822
Other income and expenses	-1 387 308	362 694	-483%	-1 750 002
OPERATING PROFIT - EBIT	10 951 308	4 872 488	125%	6 078 820
Interest income and expenses, net	-643 609	-535 133	20%	-108 476
Financing expenses from leases	-195 064	-209 158	-7%	14 094
Foreign exchange gains or loss, net	292 675	-16 703	-1852%	309 378
Expected credit loss and impairment of financial instruments	-406 721	53 797	-856%	-460 518
Financial gain or losses	-952 719	-707 197	35%	-245 522
PROFIT BEFOR TAX	10 316 307	4 165 291	148%	6 151 016
*Profit before tax%**	*4,2%*	*2,5%*	*67%*	*N/A*
Tax expenses	-1 692 875	-923 171	83%	-769 704
NET PROFIT OR LOSS	8 623 432	3 242 120	166%	5 381 312
Retranslation of subisidiaries	499 164	-18 227	N/A	517 391
TOTAL COMPREHENSIVE INCOME	**9 122 596**	**3 223 893**	**183%**	**5 898 703**
EPS (HUF/Share)	**19,3**	**9,0**	**115%**	**10,3150582**
EBITDA impact of items which never generate any net outflow of assets	-63 913	-149 591	-57%	85 678
EBITDA	**14 455 381**	**7 820 843**	**85%**	**6 634 538**
EBITDA%	5,4%	4,0%	33,4%	N/A

**Pre-tax profit% calculated without the results of the Renault Hungary joint venture.*

- The Group's **revenue** exceeded HUF 270 billion in 2022, which is more than HUF 75 billion (or **39%**) higher than the revenue for the previous year. In addition to the effect of transactions, this growth is primarily organic as the increase in turnover would have been outstanding even without the acquisition of the Slovenian entity Avto Aktiv completed in April. The main driver of growth was the significant improvement in SsangYong and Opel sales within the Distribution Business Unit, but the growth of more than HUF 27.1 billion of the Retail & Services Business Unit (impacted by both the volume effect and the price effect) is also remarkable.
- The value of **services** was up by **34%** to nearly HUF 12.7 billion from the comparative period, the main reasons being the rise in marketing expenses aimed at supporting sales in connection with the import of Opel and SsangYong vehicles, as well as an increase in marketing and other turnover-based expenses relating to rent-a-car services as demand for the service recovered after the COVID-19 pandemic had passed.
- The **34%** increase in **COGS** (by HUF 57.4 billion) was below the increase in revenue, as a result of which the Group's gross margin was up significantly from 14.1% to 16.7% during 2022. This was mainly caused by the sales backlog resulting from the delivery issues of car manufacturers and the measures implemented for the purpose of managing other economic circumstances (e.g. rising exchange rates), and so it is not a product of recurring effects.
- The **56% rise in personal expenses** was caused primarily by the increase in headcount resulting from the organisational development measures implemented in 2021, the pay rise given in response to changes in the labour market and inflation at the beginning and in the middle of the year, as well as the expansion attributable to the acquisition of Avto Aktiv completed in April. As a result of the above, not only did average wages rise, but the Group's average headcount was also up by 165 to 860 compared to the previous year.

AutoWallis GROUP

Consolidated profit & loss statement / 2

A more than twofold rise in profit before tax

HUF ths	2022	2021	Changes %	Changes
Revenue	270 165 925	194 956 435	39%	75 209 490
Distribution business unit	158 935 920	110 864 087	43%	48 071 833
Retail & Services business unit	111 230 005	84 092 348	32%	27 137 657
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EBITDA	**14 455 381**	**7 820 843**	**85%**	**6 634 538**
EBITDA%	5,4%	4,0%	33,4%	N/A

**Pre-tax profit% calculated without the results of the Renault Hungary joint venture.*

- As a result of an increase in revenue (both the price effect and the volume effect were observed at the same time) and an above-average gross margin, **operating profit (EBIT)** increased more than twofold (by 125%) to HUF 11.0 billion during the period. The Group's operating profit for Q3 was HUF 4.9 billion, a significant part of which was attributable to one-off circumstances seen during the period (i.e. events which are not necessarily recurring).
- The value of **financial gains or losses** was a loss of HUF 953 million in 2022, which translates into a decline of over HUF 245 million in comparison with the base period of 2021. The effect of the extraordinary high interest rate environment seen in 2022 is reflected in the balance of financial gains or losses.
- The Group's **EBITDA** increased nearly twofold (by 85%) to HUF 14.5 billion compared to the HUF 7.8 billion figure recorded in 2021. Accordingly, the Group's EBITDA margin increased to 5.4% from the 4.0% recorded in the previous period.
- The acquisition of Renault Hungária was completed in October 2022, which was carried out in a joint arrangement with the Portuguese entity Salvador Caetano, with equal ownership interests of 50%. As a result, 50% of the profit or loss of Renault Hungária for the last three months of the year is presented in the line item ***Share of profits of associates and joint ventures***.
- **Profit before tax** for 2022 was **HUF 10.3 billion**, which represents a massive increase in comparison with the HUF 4.2 billion amount for the previous period, partly due to the effects mentioned above. **The profit before tax margin increased from 2.1% in the previous year to 3.7%.**
- As a result of the above, the Group's **net earnings per share** (EPS) for the current period was HUF 19.3/share.

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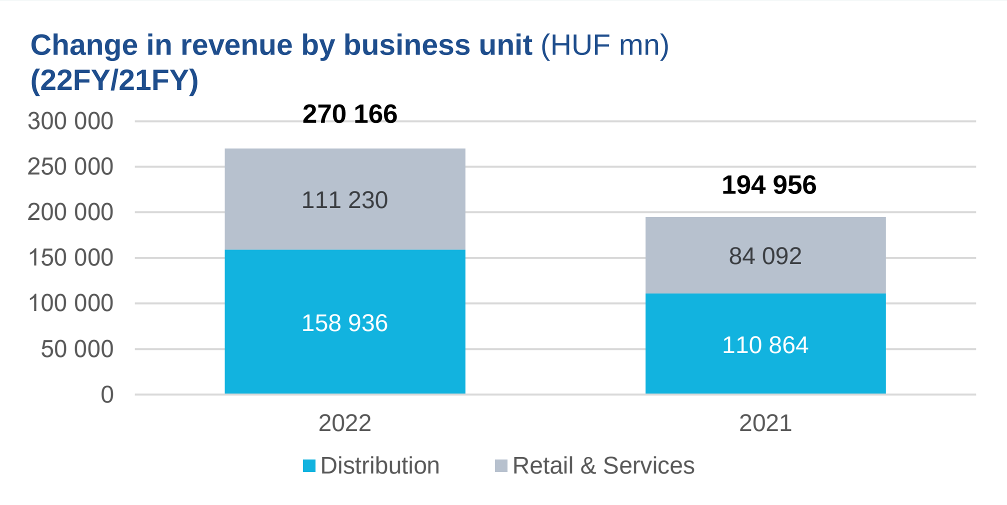
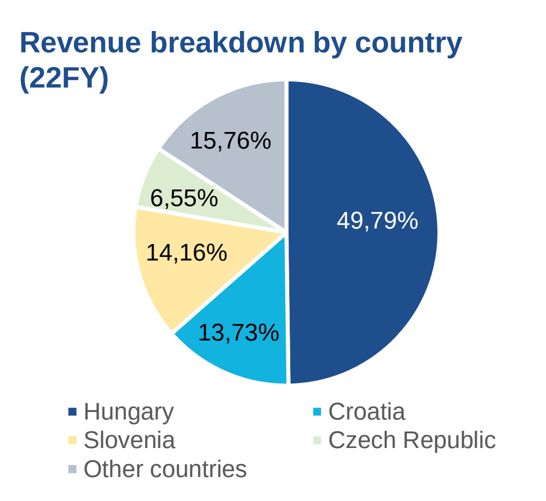
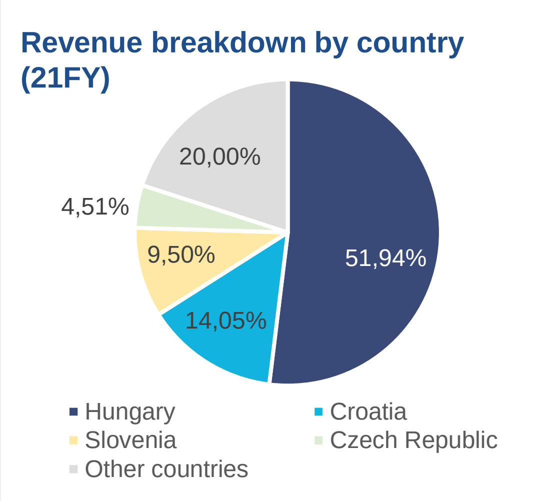
Revenue analysis by business unit

Remarkable organic growth





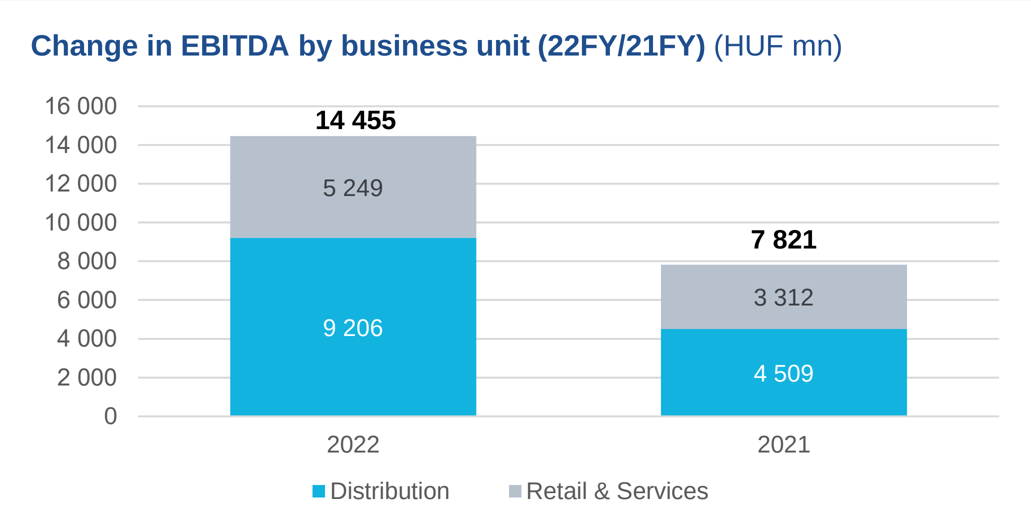


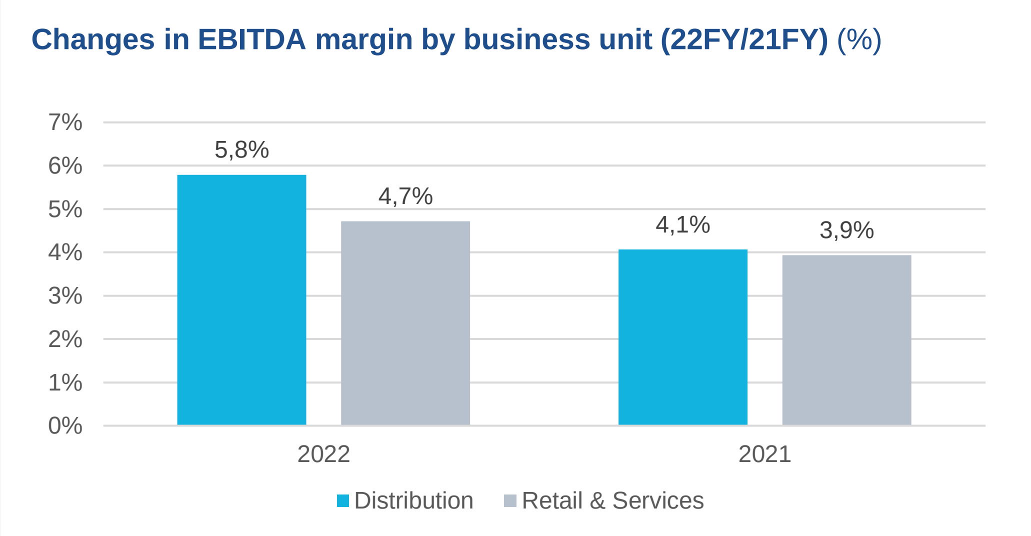
Source: the Company's consolidated IFRS financial statements and its own data

- The **Group's revenue was up by 39%**, thanks to the increase in the turnover of both the Distribution Business Unit (43%) and the Retail & Services Business Unit (32%).
- The revenue of the **Distribution Business Unit** improved by **43%** from the previous period through the organic growth in SsangYong and Opel sales. The Group had to face uncertainties in deliveries arising from supply chain issues over several periods. Delayed deliveries were postponed from one quarter to the next. *The Hungarian import of Renault and Dacia vehicles was added to the activities of the Distribution Business Unit through the acquisition of a 50% share in Renault Hungária. However, considering the fact that the transaction was conducted as a joint arrangement with the Portuguese entity Salvador Caetano, the resulting turnover is not included in the Group's revenue.*
- Despite delays in vehicle deliveries resulting from supply chain issues, as well as the difficulties in registering new motor vehicles caused by the nationwide closure of Hungarian government and municipal institutions in December affecting the Hungarian market, the revenue of the **Retail & Services Business Unit** exceeded the HUF 84 billion level recorded in the previous period by **32%** (by more than HUF 27 billion), partly because of the impact of the Avto Aktiv acquisition. Organic growth without the Slovenian acquisition exceeded 20%. Outstanding margins and price increases that exceeded the level of inflation contributed to the exceptional turnover for the entire year for the Retail & Services Business Unit as well.
- The regional leadership position of AutoWallis and its diversification in terms of revenue is demonstrated by the fact that **more than half of the Group's revenue is generated abroad**, and the Slovenian Avto Aktiv transaction completed in the spring of 2022 also contributed to this.

Profitability analysis by business unit

Both business units were able to significantly improve their profitability during the year





Source: the Company's consolidated IFRS financial statements and its own data

- Both business units contributed significantly to the increase in the Group's EBITDA.
- EBITDA growth in the Distribution Business Unit (HUF 4.7 billion or 104%) was caused mainly by an increase in the sales volume of new vehicles, particularly SsangYong sales, the continuous rise in car prices, above-average retained margins, as well as partly one-off accounting items recorded by the business unit in Q3, which led to a **more than twofold improvement in the EBITDA of the Distribution Business Unit** from the previous year.
- The **Retail & Services Business Unit achieved an EBITDA growth of HUF 5.2 billion or 59%** in the current period, primarily as a result of exceptionally high margins, rising sales volumes and effective cost management measures.
- In addition to profit volumes, margins also improved considerably as the **EBITDA margins** of the Distribution Business Unit and the Retail & Services Business Unit for the year exceeded **5.8%** and increased to **4.7%**, respectively.

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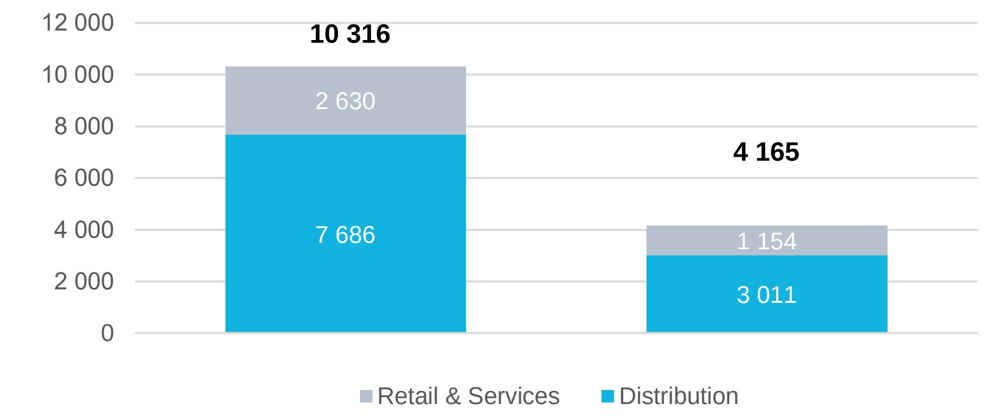
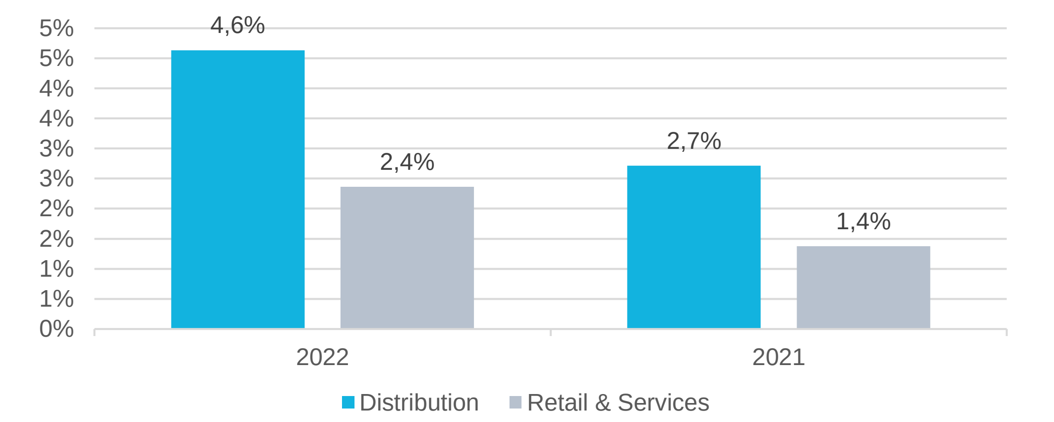
Profitability analysis by business unit

Both business units were able to significantly improve their profitability during the period



Source: the Company's consolidated IFRS financial statements and its own data



*Note: * The margin is calculated without the profit of the joint venture Renault Hungária taken into account.*

- *Note: The Group's profit before tax already includes the profit of Renault Hungária attributable to the Group, and this profit is also reflected in the profit before tax of the Group's Distribution Business Unit. Therefore, an analysis of the profit before tax of each business unit will be presented in the investor presentation going forward.*
- Much of the increase in the Group's profit before tax is attributable to the Distribution Business Unit (HUF 4.7 billion or 155%). This expansion includes the effect of transactions as well (HUF 318 million), but the growth is primarily organic (HUF 4.4 billion or 45%). The main source of this organic growth is the increase in the volume, price and margin of the sale of new cars, combined with the impact of partly one-off accounting items affecting the business unit which were recognised during the period. The profit of the business unit was reduced by the financial gains or losses of the business unit for an amount of HUF 483 million. As a result of the above, **the profit before tax of the Distribution Business Unit increased to nearly HUF 7.7 billion**.
- The **Retail & Services Business Unit achieved a growth of HUF 1.5 billion or 127% in profit before tax** in the current period, primarily as a result of exceptionally high margins, rising sales volumes and effective cost management measures. The profit before tax of the business unit was reduced by the financial gains or losses of the business unit for an amount of HUF 446 million.
- In addition to profit volumes, margins also improved considerably as the **profit before tax margins** of the Distribution Business Unit and the Retail & Services Business Unit exceeded **4.6%** and increased to **2.4%**, respectively.

Consolidated balance sheet

A healthy balance sheet and a stable financing position that provide a solid foundation and potential for further growth

HUF ths	22FY	21FY	Changes %	Changes
Property, plant and equipment	21 000 710	13 377 526	57%	7 623 184
Assets held for sales	2 695 018	2 827 578	-5%	-132 560
Right-of-use assets	2 170 017	4 593 643	-53%	-2 423 626
Other non-current assets	6 099 050	4 305 228	42%	1 793 822
Non-current assets	31 964 795	25 103 975	27%	6 860 820
Goods	55 164 497	24 239 704	128%	30 924 793
Other current assets	29 667 944	14 323 893	107%	15 344 051
Cash and cash equivalents	16 886 900	24 698 967	-32%	-7 812 067
Current assets	101 719 341	63 262 564	61%	38 456 777
Assets held for sale	0	610 000	-100%	-610 000
Assets total	**133 684 136**	**88 976 539**	**50%**	**44 707 597**

HUF ths	22FY	21FY	Changes %	Changes
Equity total	35 465 100	24 271 670	46%	11 193 430
Long term debentures	9 534 861	9 546 913	0%	-12 052
Long term loans	5 841 553	2 359 665	148%	3 481 888
Long term lease liabilities	1 904 072	4 714 662	-60%	-2 810 590
Other long term liabilities (non-interest bearing)	828 305	706 516	17%	121 789
Long term liabilities	18 108 791	17 327 757	5%	781 034
Short term loans	1 385 474	252 822	448%	1 132 652
Inventory financing loans	4 301 178	1 990 875	116%	2 310 303
Short term lease liabilities	1 262 030	1 867 247	-32%	-605 217
Liabilities from reverse factoring	30 236 636	8 847 301	242%	21 389 335
Other short term liabilities (interest bearing)	288 000	744 260	-61%	-456 260
Accounts payable and advance payment received from customers	29 582 262	21 904 440	35%	7 677 822
Other short term liabilities interest bearing)	13 054 665	11 720 166	11%	1 334 499
Short term liabilities	80 110 245	47 327 112	69%	32 783 133
Liabilities related to assets held for sale	0	50 000	-100%	-50 000
Liabilities	**98 219 036**	**64 704 869**	**52%**	**33 514 167**
Equity and liabilities	**133 684 136**	**88 976 539**	**50%**	**44 707 597**

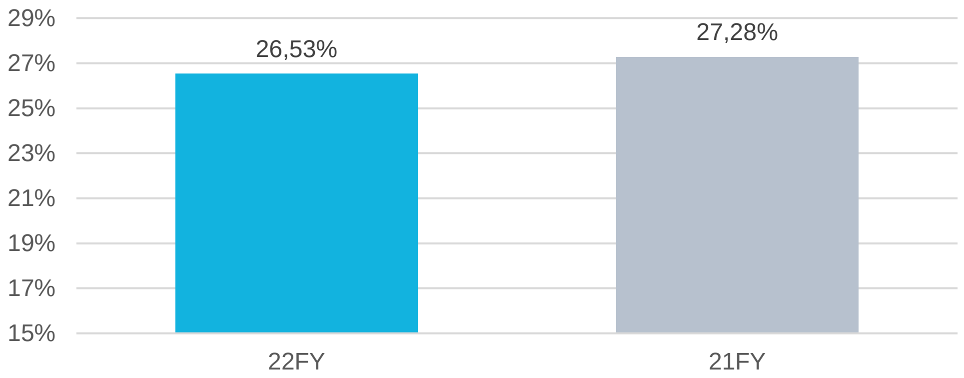
- The value of **non-current assets** increased by 27% (more than HUF 7.0 billion) compared to the end of 2021, nearly reaching HUF 32 billion. The main reason behind this increase is the rise in the value of property, plant and equipment caused by the acquisition of Avto Aktiv in Slovenia in April and the change in the number of vehicles leased as a result of the expansion of rent-a-car services. In addition, the proportion of items within non-current assets changed as a result of the in-kind contribution of the subsidiary owning the property where the dealerships in Ljubljana are located, which was completed in July.
- **Current assets** were up by 61% compared to the end of the previous year, which is explained by, amongst others, the Group's expansion by acquisitions, as well as the increase in the elements of working capital caused by the temporary increase in inventories associated with the growth in turnover and uncertainties in year-end deliveries.
- The Group sold its **held-for-sale** property in Biatorbágy during the current period (the gain was recognised in other income and expenses) and, as a result, the asset itself and the related liability were derecognised.
- The increase in the Group's **equity** was caused mainly by the profit for the period and the effect of the private share issue resulting from the in-kind contribution of the subsidiary owning the Slovenian property.
- **Long-term liabilities** essentially remained at the same level. The change in the proportions of the balance sheet lines was primarily caused by the in-kind contribution of the subsidiary owning the Slovenian property.
- The HUF 32.8 billion increase in **short-term liabilities** to HUF 80.1 billion is explained mainly by the aggregate increase in reverse factoring liabilities and financing loans resulting from the growth in turnover (which amount to HUF 23.8 billion).
- As a result of the above, the Group's **balance sheet total** increased by almost HUF 45 billion (50%) during the current period.

AutoWallis GROUP

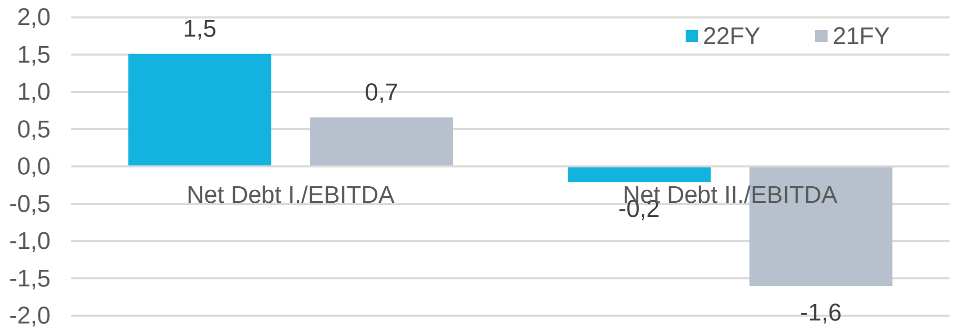
Financial strength

Stable equity/total assets ratio and low net debt

Total equity / Total assets ratio (22FY - FY21)



NetDebt /EBITDA development 22FY - 21FY



Source: the Company's consolidated IFRS financial statements and its own data

Note: Net Debt I. = Total external financing, Net Debt II. = Total external financing – funds related to inventory financing. The EBITDA used for calculation purposes is the so-called rolling EBITDA for the past 12 months.

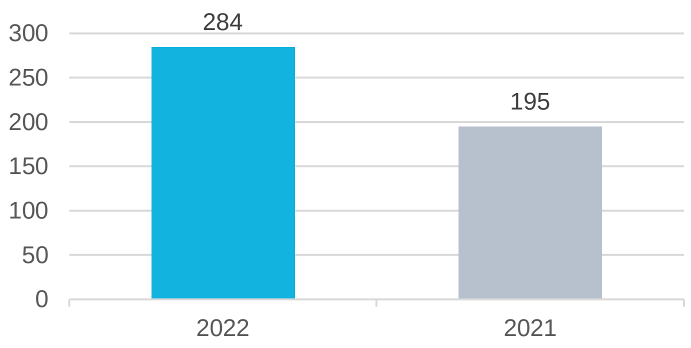
- The Group has maintained a healthy capital structure and its consolidated **equity/total assets ratio was 27% at the end of the current period**, significantly surpassing the levels required as financing targets (15%). Despite the increase in the balance sheet total associated with the considerable rise in turnover, the effect of transactions and uncertainties in year-end deliveries in the industry, the Group maintained its 27% equity/total assets ratio from the end of the previous year.
- The Group's Net Debt/EBITDA ratios, which include both the ratio that takes into account the total debt and the one that excludes items related to inventory financing (inventory financing loans, IFRS 16, reverse factoring), reflect the Group's continuously improving financing position. The Group has excellent liquidity and solid debt service coverage.

AutoWallis GROUP

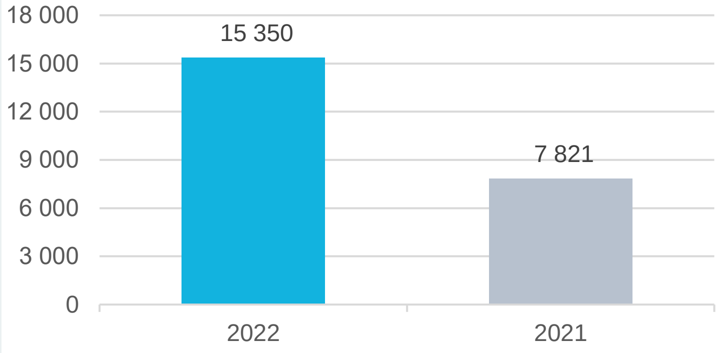
Total market reach of the Group

Combined extended financial data of the Group and its joint ventures

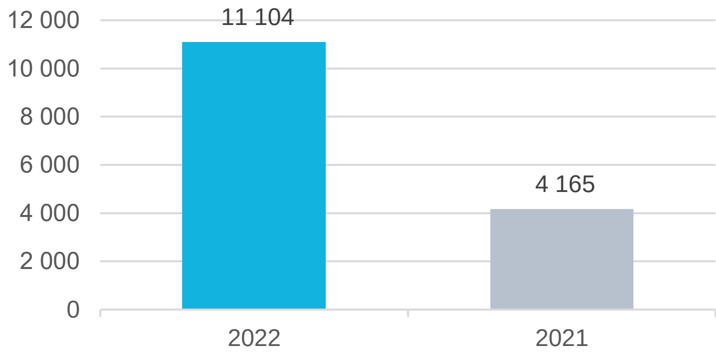
Group and joint ventures combined extended revenue (HUF mn)



Group's total market reach - EBITDA (HUF mn)



Group's total market reach - Profit before tax (HUF mn)



Note: In order to the Group presents its total market reach, the total revenue from the vehicles sold and the related profit, in this page presents the Group's consolidated profit under IFRS and the periodic revenue and related profit in a combined manner. Therefore the revenue and margin% data presented on this slide of the investor presentation are not based on the Group's 2022 consolidated financial statements prepared in accordance with the IFRSs adopted by the EU.

- The Hungarian import of Renault and Dacia vehicles was added to the Group's activities in 2022Q4. Together with this new importer activity, the Group sold a total of 31,303 vehicles in 2022. With the revenue from these sales included, the Group earned revenues of over HUF 284 billion in 2022. Thus, in addition to the HUF 284 billion of total combined (Group's consolidated and joint ventures revenue together) revenue, EBITDA of HUF 15.4 billion and pre-tax profit of HUF 11.1 billion were combined.
- RN Hungary Ltd, which imports Renault and Dacia vehicles, sold a total of 10,871 vehicles in 2022.This achieved a total of HUF 73 billion in sales, HUF 2 billion in EBITDA and HUF 2,2 million in profit before tax.

AutoWallis GROUP

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Contact
Gábor Székely
Director of Investor Relations and ESG
gabor.szekely@autowallis.hu

AutoWallis Nyrt.
1055 Budapest, Honvéd utca 20. • Phone: (+36) 1 551 5773 • info@autowallis.hu
www.autowallis.hu

Annexes

Annexes

The annexes to the annual report for 2022 are available on our website.