31/08/2023

INVESTOR PRESENTATION

RESULTS FOR 2023H1

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 semi-annual report prepared by the Company in accordance with IAS 34 Interim Financial Reporting. The information contained therein and 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://autowallis.com/kozzetetelek/

Table of Contents

01 Executive Summary

Key events in 2023H1

We are making progress implementing our previously announced growth strategy

The **acquisition** of Net Mobilitás Zrt., the operator of the websites **JóAutók.hu and AutóLicit.hu**, was finalised 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 an ESG certification is a strategic goal for the Company and, as an important milestone towards this objective, the Company **published its first Sustainability Report for 2021** on 20 March 2023.

The Group launched a **new ESO program** in May 2023.

Events after the balance sheet date:
In August 2023, the Group acquired Wallis Autómegosztó Zrt., **the entity operating Share Now in the Hungarian market.**

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Key results in 2023H1

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

VEHICLES SOLD	REVENUE	EBITDA	EPS
25,634 units	**HUF 194 billion**	**HUF 10.4 billion**	**HUF 16.9 / share**
+**66.7**%	+**48**%	+**50**%	+**85**%
vs 2022H1	vs 2022H1	vs 2022H1	vs 2022H1

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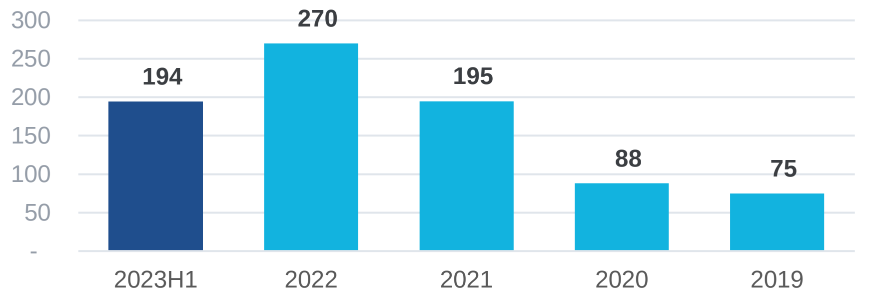
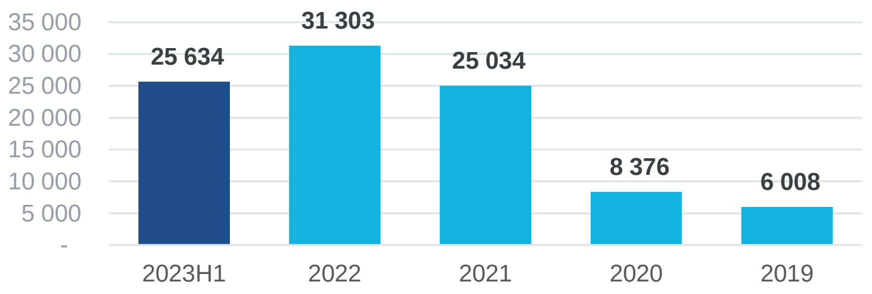
Portfolio

Continuous organic growth supported by growth through acquisitions

Changes in revenue 23H1 - 19FY (HUF billion) *Source: the Company's own data*



Changes in the vehicle sales 23H1 - 19FY (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	RENAULT, OPEL, SSANGYONG, LAND ROVER, ISUZU, DACIA, JAGUAR	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, NISSAN, SUZUKI, PEUGEOT, TOYOTA, RENAULT, SSANGYONG, KIA, JóAutók.hu	Hungary (9 sites), Slovenia (5 sites)
Comprehensive servicing activities and auxiliary services relating to the brands distributed by the Group		
Short-term and long-term car rental and fleet management	SIXT rent a car, NELSON	Hungary

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

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Economic and market environment

The previous decline seems to be reversing in the automotive markets of the region, while unfavourable inflationary and macroeconomic trends continue to be observed regionally

Economic environment

- In 2023Q2, the economic performance of the European Union improved by 0.5% compared to the previous year following a growth of 1.1% in 2023Q1, while on average, the Group's relevant markets stagnated compared to the year before. Of these, the Hungarian economy, the Group's most relevant market, declined by 2.4% in Q2.*
- Inflation and reference interest rates have been dropping, but still remain high across the globe in 2023Q2. In June 2023, consumer prices exceeded those in the previous year by an average of 10.2% in the Group's relevant markets and by 6.4% in the European Union as a whole.*
- Economic slowdown, rising prices and the reduced availability of financing continue to have an impact on demand in the automotive market, which could cause a decline in the price of new and used motor vehicles and/or margins in the subsequent period.
- The negative impact of these factors on demand mainly affects orders for key brands, but deliveries are still determined by existing supply delays, while the increase in the price levels of motor vehicles and mobility services has compensated for the reduction in volume so far.
- The above factors could act as catalysts for the consolidation process that has already begun in the industry, which could support the Group in implementing 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 resulting from the chip shortage significantly reduced the number of cars that were available for delivery last year. The previously widespread supply issues have mostly been solved, and inventory levels started to rise in certain markets in 2023Q2. Problems involving logistics capacities in the region continue to have an unfavourable impact on inventory levels and deliveries.
- On average, the number of first registrations of new passenger cars in EU markets and in the relevant markets of the Group was up by 15.0% in 2023Q2 from the same period of the previous year.**
- The ongoing expansion of tourism that had started last year continued in 2023Q2, also in terms of the number of passengers arriving at the international airport in Budapest. In the first six months of the year, the airport of the Hungarian capital served a total of 6 million passengers, which exceeds the figure for the same period of the previous year by 26.56% and is a mere 9.4% below the pre-pandemic level. ***

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** Source: The Weekly Monitor of the Hungarian Central Statistical Office, Eurostat*
*** Automotive market data provided by DataHouse and/or ACEA.*
**** Source: airportal.hu*

02 Financial and Operating Summary

Summary of operating performance

Dynamic growth in the Group's sales in H1 in all areas

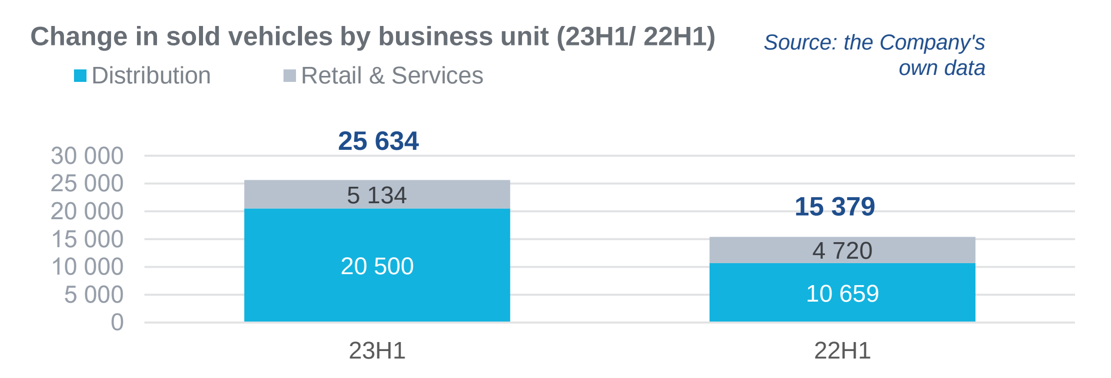
- Thanks to its regional presence, **the Group continued its consistent growth in H1 after increasing the number of vehicles sold by two thirds** compared to the previous year.

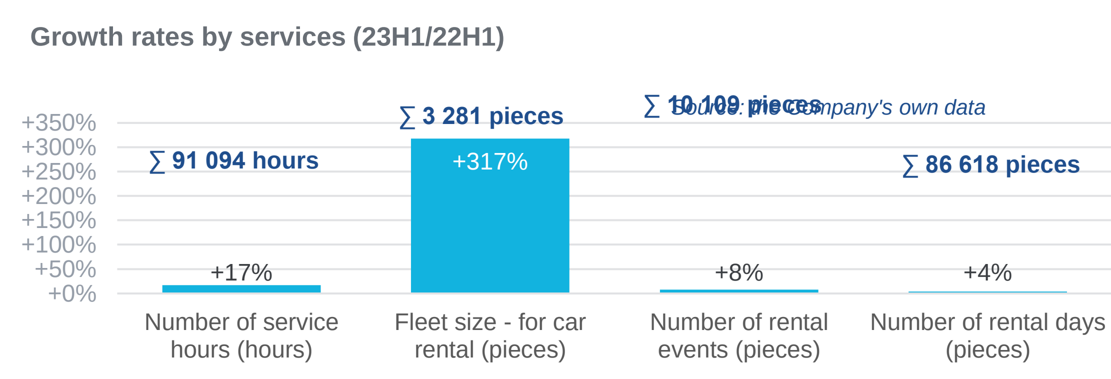
- During the first half of the year, sales in the **Distribution Business Unit** were nearly doubled (+92.3%) to 20,500 units from 2022H1, which was partly attributable to the acquisition of Renault Hungária completed last year (+5,998 units). However, it is important to note that sales in this segment improved by 36.1% (or 3,843 units) even without this acquisition, with SsangYong once again demonstrating the strongest growth (an increase of 2,295 units or 64.3%), followed by Opel (with an increase of 1,439 units or 22.6%).

- The **Retail & Services Business Unit** sold 4,178 new (+10.4%) and 956 used (+2%) vehicles, as a result of which it significantly outperformed the declining Hungarian passenger car market*.

- In terms of the **services of the Retail & Services Business Unit**, the number of service hours increased by 16.8% to 91,094, and so the Group was able to expand further in terms of short-term car rental as well. Sixt, an entity represented in Hungary by AutoWallis Group, increased the number of rental transactions by 7.8% to 10,109 in H1, while the number of rental days was up by 3.8% to 86,618. With the acquisition of Nelson Flottalízing Kft. in February, long-term **car rental and fleet management services** expanded considerably and, as a result, the Group had 3,281 vehicles in its fleet to serve its clients in H1.

** Market data provided by DataHouse*.





Consolidated profit & loss statement

Sustained revenue growth despite the unfavourable economic environment...

- The Group's **revenue** was nearly HUF 195 billion in 2023H1, which is more than HUF 63 billion (or **48%)** higher than the revenue for H1 of the previous year. In addition to the effects of transactions (Net Mobilitás Zrt. and Nelson Flottalízing Kft.), organic growth also played a considerable role in growth. The main drivers of the latter were the significant improvement in SsangYong and Opel sales within the Distribution Business Unit and the growth of more than HUF 23.3 billion of the Retail & Services Business Unit (impacted by both the volume effect and the price effect).
- **The value of materials** increased by 55% (from HUF 2.4 billion to HUF 3.8 billion), the main reasons being the rise in public utility costs caused by the significant rise in energy prices, inflation and other factors, as well as the substantial increase in the price of materials used in the course of servicing activities. The value of **services** was up by **33%** to HUF 8.3 billion from the comparative period. The main cause of this increase in costs is the rise in logistics expenses, communication expenses and insurance premiums associated with higher sales volumes (Opel and SsangYong).
- The **47%** (HUF 52.8 billion) growth in **COGS** is almost the same as the rate at which revenue increased and, as a result, the Group was able to sustain and even slightly improve its high gross margin from the base period (to 15.7% compared to 15.2% in the same period as the previous year).

Note: The effect of acquisitions (transactions) includes the impact of transactions completed since the comparative period, while organic changes include the performance of companies that were already part of the group during the comparative period. These analyses do not include changes for partial periods (pro forma changes).

HUF ths	2023H1	2022H1	Changes %	Changes
Revenue	194 342 010	131 045 612	48%	63 296 398
Distribution business unit	118 783 281	78 824 637	51%	39 958 644
Retail & Services business unit	75 558 729	52 220 975	45%	23 337 754
Material	-3 772 841	-2 428 957	55%	-1 343 884
Services	-8 305 415	-6 266 271	33%	-2 039 144
Cost of goods sold	-163 865 428	-111 106 962	47%	-52 758 466
Personal expenses	-6 619 653	-4 730 120	40%	-1 889 533
Depreciation	-2 011 670	-1 631 046	23%	-380 624
Profit or loss from trading	9 767 003	4 882 256	100%	4 884 747
Other income and expenses	-1 406 986	319 188	-541%	-1 726 174
OPERATING PROFIT – EBIT	8 360 017	5 201 445	61%	3 158 572
Interest income and expenses, net	-1 590 911	-231 249	588%	-1 359 662
Financing expenses from leases	-446 269	-123 517	261%	-322 752
Foreign exchange gains or loss, net	1 092 171	330	N/A	1 091 841
Expected credit loss and impairment of financial instruments	332 845	-4 898	N/A	337 743
Financial gain or losses	-612 164	-359 334	70%	-252 830
Share of profits of associates and joint ventures	916 787	0	N/A	916 787
PROFIT BEFOR TAX	8 664 640	4 842 110	79%	3 822 530
*Profit before tax%**	*4,0%*	*3,7%*	*8%*	*N/A*
Tax expenses	-1 134 564	-759 391	49%	-375 173
NET PROFIT OR LOSS	7 530 076	4 082 720	84%	3 447 357
Retranslation of subisidiaries	-475 688	461 505	N/A	-937 193
TOTAL COMPREHENSIVE INCOME	**7 054 388**	**4 544 224**	**55%**	**2 510 164**
EPS (HUF/Share)	**16,9**	**9,1**	**85%**	**7,7**
EBITDA impact of items which never generate any net outflow of assets and others**	0	-68 749	-100%	68 749
EBITDA	**10 371 686**	**6 901 239**	**50%**	**3 470 448**
EBITDA%	5,3%	5,3%	1%	N/A

**Pre-tax profit% calculated without the results of the RN Hungary Ltd. joint venture.*
***The effect of non-material changes in the classifications affecting the FY22 that have occurred since the publication of the 2022H1.*

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Consolidated profit & loss statement

...61% growth in operating profit...

- The **40% rise in personnel expenses** was caused primarily by the acquisitions completed in 2022 and 2023 (Nelson's fleet management business and Net Mobilitás Zrt.) and the resulting increase in average headcount, as well as and the pay rise given in response to changes in the labour market. (The Group's average headcount was up by 109 to 931 compared to the same period of the previous year.)
- The increase in the balance of **other income and expenses** to HUF 1.4 billion compared to the base period was caused mainly by the impairment loss of HUF 924 million in H1 in connection with an insurance event related to one of the Far Eastern brands of the Group's distrtibution activities.
- As a result of an increase in revenue (both the price effect and the volume effect were observed at the same time) and a consistently high gross margin, **operating profit (EBIT)** increased by more than half (by 61%) to HUF 8.4 billion during the period.
- The net value of **financial gains or losses** was a loss of HUF 612 million in 2023H1, which translates into a surplus expense of over HUF 253 million in comparison with the base period of 2022H1. The main drivers included the significant increase in financing expenses incurred in the normal course of business caused by rising interest rates and the growth in the volume of financing. This was offset by realised and unrealised foreign exchange gains resulting from the translation of items denominated in foreign currency for the period.

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Consolidated profit & loss statement

...and a nearly 80% increase in profit before tax

- The Group's **EBITDA** increased by half (+50%, including a 22% growth resulting from transactions) to HUF 10.4 billion compared to the HUF 6.9 billion figure recorded in 2022H1. The Group's EBITDA margin remained unchanged (5.3%).
- 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 is presented in the line item **Share of profits of associates and joint ventures**. This amounted to HUF 911 million in 2023H1.
- **Profit before tax** for 2023H1 was HUF 8.7 billion, which represents a massive increase in comparison with the HUF 4.8 billion amount for the previous period, partly due to the aggregate impact of the factors mentioned above (effect of transactions, uncertainties in deliveries, etc.). **The profit before tax margin increased from 3.7% in the previous year to 4.0%.** Of the 79% increase in profit volume, organic growth represents 56%, while the remaining 23% is attributable to the effect of transactions.
- As a result of the above, the Group's **net earnings per share** (EPS) for the current period was HUF 16.9/share.

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Revenue analysis by business unit

Growth in both business units and significant improvement in revenue structure

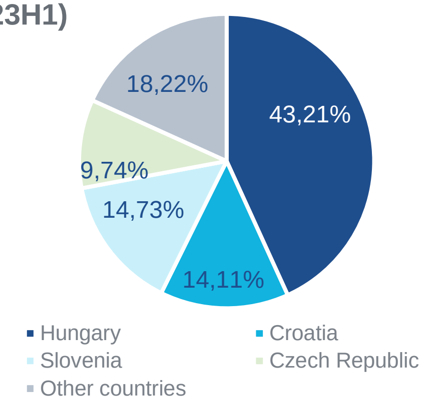
- The revenue of the **Distribution Business Unit** improved by **50.7%** from the previous period through the organic growth in SsangYong and Opel sales (impacted by both the volume effect and the price effect). The Group had to face uncertainties in deliveries arising from supply chain issues over 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 revenue is not included in the revenue of the Group and the business unit.***

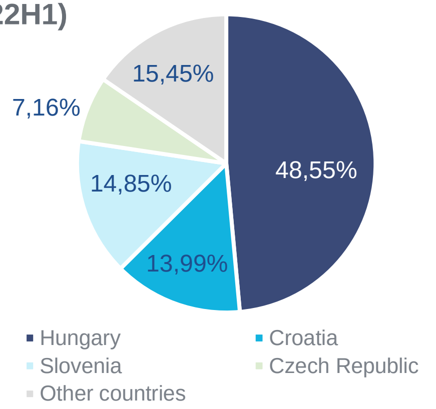
- The revenue of the **Retail & Services Business Unit** exceeded the HUF 52.2 billion level recorded in the previous period by **44.7%** (over HUF 23.3 billion), primarily thanks to acquisitions (Nelson Flottalízing and Net Mobilitás), the delayed impact of last year's orders on H1, outstanding margins surpassing the average level of previous periods, as well as widespread price increases in the automotive sales market that exceeded the level of inflation.

- The position of AutoWallis as an increasingly dominant player in the region and its already high and **continuously improving diversification** in terms of revenue is demonstrated by the fact that nearly 57% of the Group's revenue is generated abroad, which represents a considerable improvement in revenue structure in comparison with the same period of the previous year, in line with the formulated strategy.

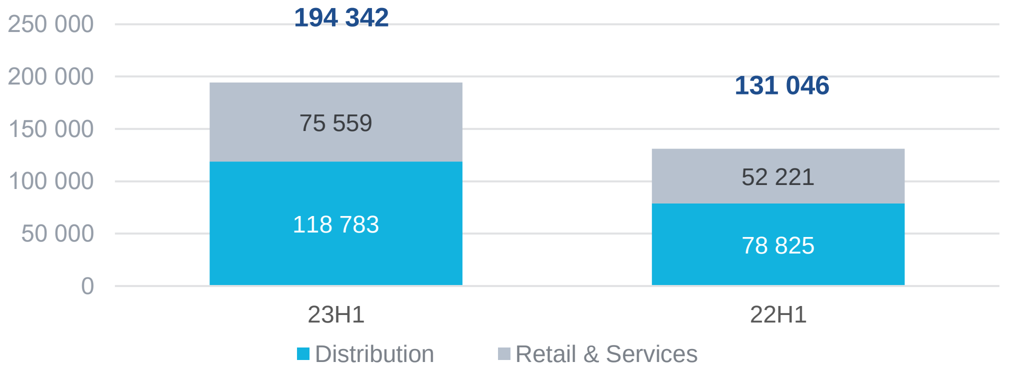
Revenue breakdown by country (23H1)



Revenue breakdown by country (22H1)



Change in revenue by business unit in HUF mn (23H1/22H1)



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

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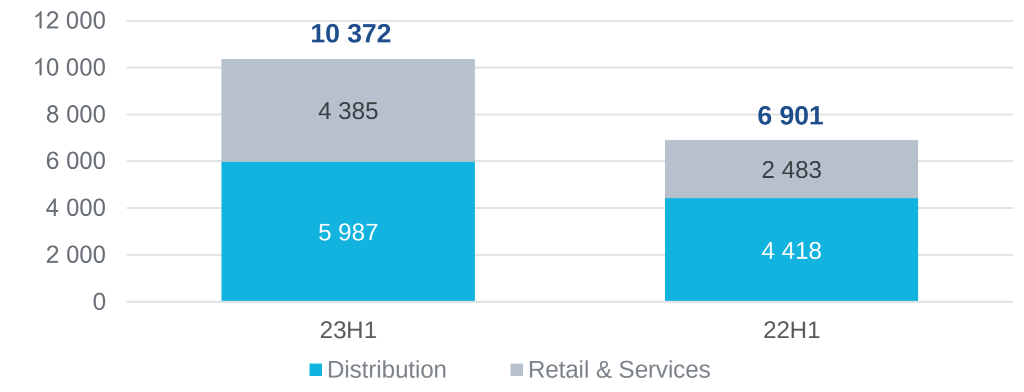
Profitability analysis by business unit

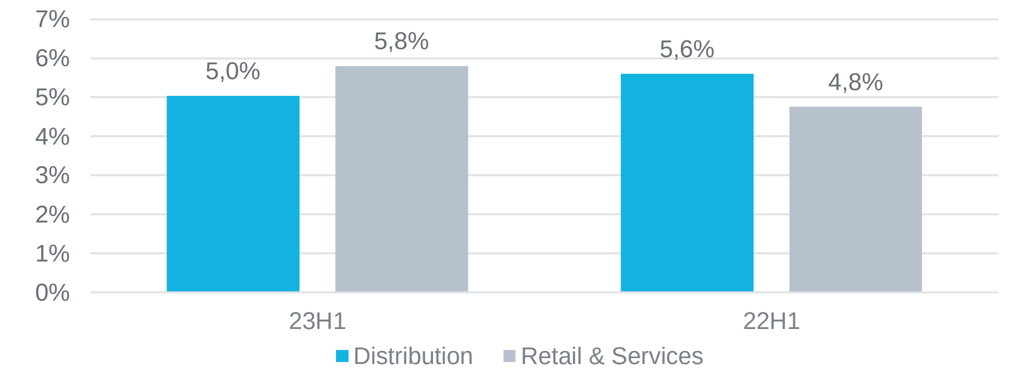
Both business units were able to achieve substantial EBITDA growth

- Both business units contributed significantly to the increase in the Group's EBITDA.
- EBITDA growth in the Distribution Business Unit (HUF 1.57 billion or 35.5%) was caused mainly by an increase in the sales volume of new vehicles, particularly SsangYong and Opel sales, the continuous rise in car prices and margins that remain high across the industry, which led to a **significant improvement in the EBITDA of the Distribution Business Unit** from the previous year. However, this growth is offset by an impairment loss of HUF 924 million and the related provisions made during H1 in connection with an insurance event related to one of the Far Eastern brands of the Group's distribution activity. The **decline in EBITDA%** was primarily caused by this impairment loss, in addition to the fact that the margin normalisation that has started in the industry is already making its presence felt in the business unit.
- The **Retail & Services Business Unit achieved an EBITDA growth of HUF 1.9 billion or 76.6%** in the current period, primarily as a result of above-average margins, rising sales volumes and effective cost management measures in H1, as well as the effect of transactions. In addition to profit volumes, distribution unit margins also improved considerably as the EBITDA margin of the Retail & Services Business Unit increased from 4.8% to 5.8% in the first six months of the year compared to the base period.

Change in EBITDA by business unit in HUF mn (23H1/22H1)



Changes in EBITDA margin by business unit (23H1/22H1)



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

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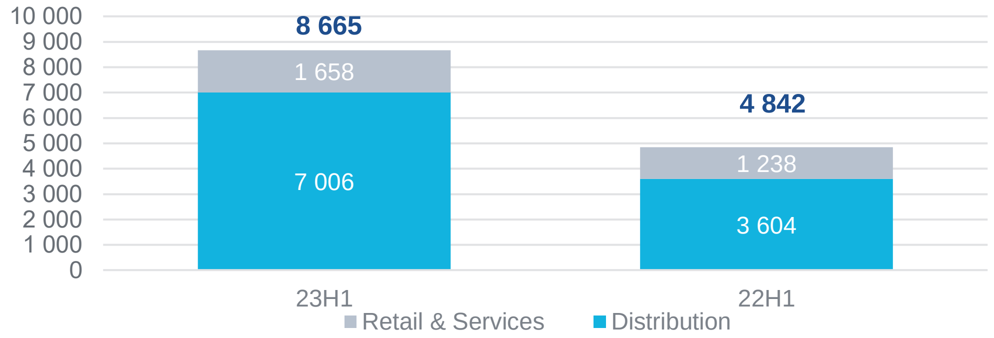
Profitability analysis by business unit

Outstanding growth in profit before tax in both business units

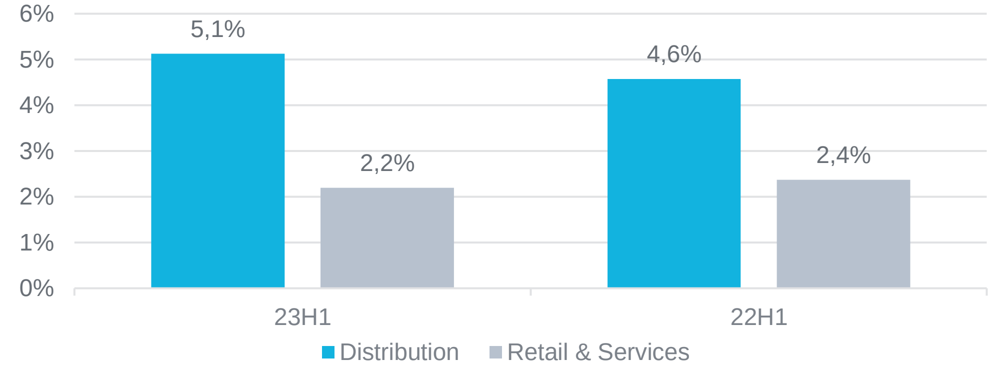
- Much of the increase in the Group's profit before tax is attributable to the performance of the **Distribution Business Unit** (HUF 3.4 billion or 94.4%). This expansion includes the effect of transactions as well (+HUF 917 million), but the growth was primarily organic (HUF 2.3 billion). The main source of the latter is the aggregate impact of the increase in the volume, price and margin of the sale of new cars. The profit before tax of the business unit for the current period was reduced by an impairment loss of HUF 924 million recognised in connection with an insurance event related to one of the Far Eastern brands of the Group's distribution activities. . The profit of the business unit was further improved by the financial gains or losses of the business unit for an amount of HUF 867 million. As a result of the above, **the profit before tax of the Distribution Business Unit surpassed HUF 7 billion**.
- The profit before tax of the **Retail & Services Business Unit** was HUF 1,658 million, which represents a growth of 33.9% over the current period. This increase was primarily the result of higher 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 1,479 million, mainly due to the high interest rate environment.
- In addition to profit volumes, group-level margins also declined slightly as the **profit before tax margin** of the Distribution Business Unit increased from 4.6% to 5.1% and the **profit before tax margin** of the Retail & Services Business Unit dropped from 2.4% to 2.2%.

Note: The Group's profit before tax includes the profit of Renault Hungária attributable to the Group, which is reflected in the profit before tax of the Distribution Business Unit.

Profit before tax by business unit 23H1/22H1 (HUF mn)



Profit before tax margin by business unit 23H1/22H1 (%)*



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

*Note: * The margin is calculated without the 2022 profit of the joint venture Renault Hungária taken into account.*

Consolidated balance sheet

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

- The value of **non-current assets** increased by 27% (or nearly HUF 8.7 billion) compared to the end of 2022, nearly reaching HUF 41 billion. The main reason behind this increase is the change in net investments in leases caused by the acquisition of Nelson Flottalízing Kft. completed in February.
- **Current assets** were up by 13% compared to the end of the previous year, which is explained by, amongst others, the change in working capital caused by the temporary increase in trade receivables and the short-term change of investments in leases that increased as a result of the effect of transactions.
- The increase in the Group's **equity** was caused mainly by the profit for the period and the amount recognised in connection with the transaction completed during H1.
- **Long-term liabilities** were up by 32% in 2023H1 compared to the previous period, the primary reason being that the long-term liabilities (primarily leases and loans) presented in the balance sheets of the entities involved in the acquisitions are now included in the Group's balance sheet.
- The increase in the value of **short-term liabilities** is explained mainly by the growth in advance payments received from suppliers and customers (HUF 3.7 billion) and a slower rate of improvement in terms of other forms of inventory financing.
- As a result of the above, the Group's **balance sheet total** increased by almost HUF 22.2 billion (17%) during the current period.

HUF ths	23H1	22FY	Changes %	Changes
Property, plant and equipment	21 458 476	21 000 710	2%	457 766
Assets held for sales	2 746 478	2 695 018	2%	51 460
Right-of-use assets	2 436 207	2 170 017	12%	266 190
Net investment in leases (long-term part)	6 990 311	378 544	1747%	6 611 767
Other non-current assets	7 056 987	5 720 506	23%	1 336 481
Non-current assets	40 688 459	31 964 795	27%	8 723 664
Goods	69 053 975	55 164 497	25%	13 889 478
Other current assets	28 403 356	29 667 944	-4%	-1 264 588
Cash and cash equivalents	17 720 833	16 886 900	5%	833 933
Current assets	115 178 164	101 719 341	13%	13 458 823
Assets total	**155 866 623**	**133 684 136**	**17%**	**22 182 487**

HUF ths	23H1	22FY	Changes %	Changes
Equity total	42 921 346	35 465 100	21%	7 456 246
Long term debentures	9 582 117	9 534 861	0%	47 256
Long term loans	7 722 371	5 841 553	32%	1 880 818
Long term lease liabilities	5 687 546	1 904 072	199%	3 783 474
Other long term liabilities (non-interest bearing)	947 507	828 305	14%	119 202
Long term liabilities	23 939 541	18 108 791	32%	5 830 750
Short term loans	1 619 427	1 385 474	17%	233 953
Inventory financing loans	4 449 678	4 301 178	3%	148 500
Short term lease liabilities	2 658 514	1 262 030	111%	1 396 484
Liabilities from reverse factoring	27 380 511	27 091 112	1%	289 399
Other short term liabilities (interest bearing)	477 201	288 000	66%	189 201
Accounts payable and advance payment received from customers	24 933 723	21 217 697	18%	3 716 026
Other short term liabilities interest bearing)	27 486 682	24 564 754	12%	2 921 928
Short term liabilities	89 005 736	80 110 245	11%	8 895 491
Liabilities	**112 945 277**	**98 219 036**	**15%**	**14 726 241**
Equity and liabilities	**155 866 623**	**133 684 136**	**17%**	**22 182 487**

AutoWallis GROUP

Financial strength

Consistently high equity/total assets ratio and low net debt

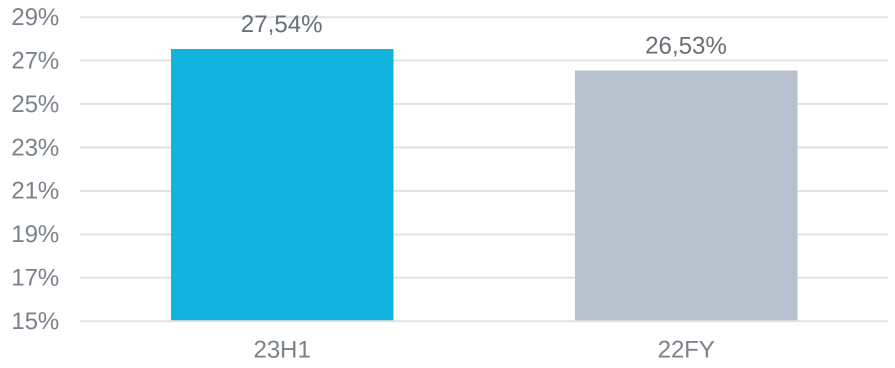
- The Group maintained its healthy capital structure and was able to improve its equity/total assets ratio to 27.5% from 26.53% at the end of the previous year, despite the increase in the balance sheet total associated with the significant effect of transactions, the rise in turnover and the prolonged uncertainties in deliveries in the industry. Its consolidated **equity/total assets ratio was 27.5% at the end of the current period**, significantly surpassing the levels required as financing targets (15%).
- The Group continues to have excellent liquidity and solid debt service coverage. This is confirmed by the low value of 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 loans, IFRS 16, reverse factoring).

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

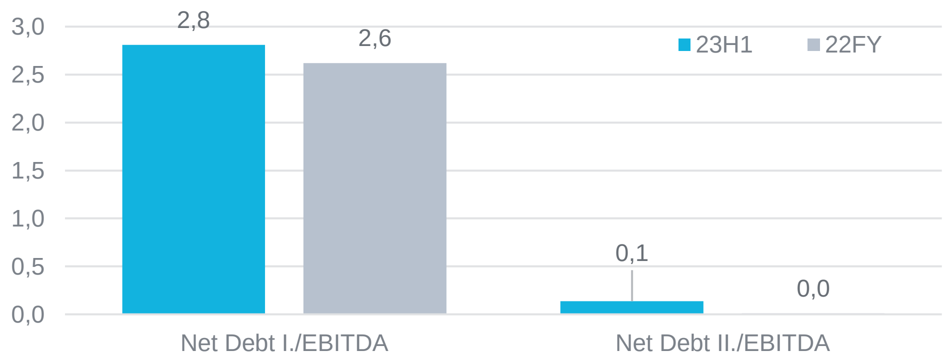
** Note: Net Debt I. = Total external financing, Net Debt II. = Total external financing – funds related to inventory financing. The EBITDA used for calculation purposes is the so-called rolling EBITDA for the past 12 months.*

*** The 22FY Net Debt/EBITDA figures included in the investor presentation at the end of last year have been corrected, which has led to a change in the base values.*

Total equity / Total assets ratio (23H1 - 22FY)



Net Debt/EBITDA development (23H1 - 22FY) *,**



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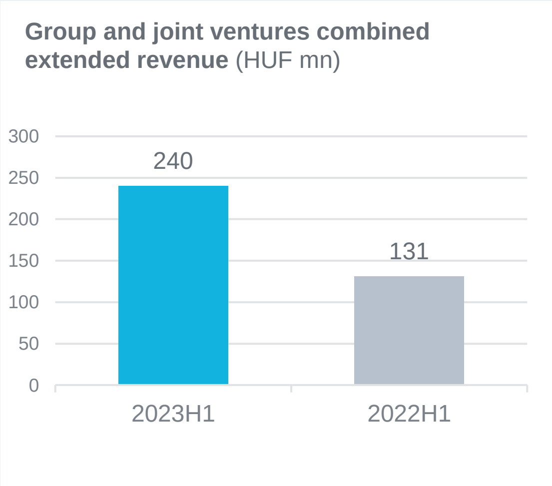
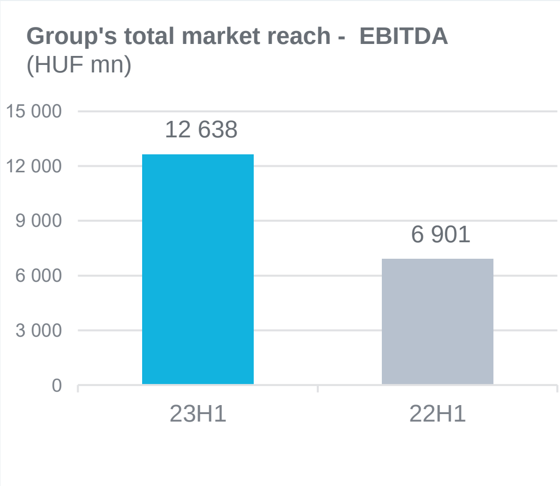
Total market presence of the Group

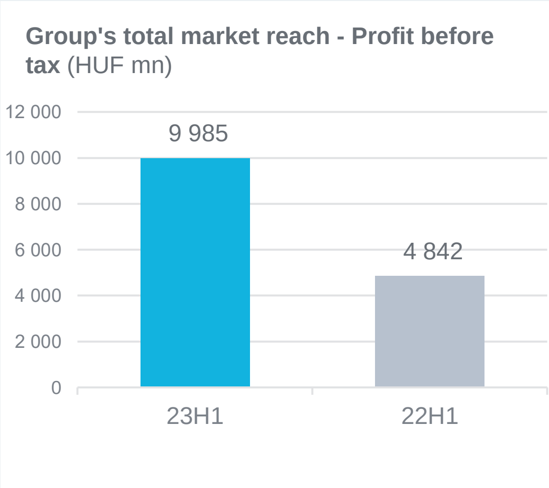
Combined extended financial data of the Group's consolidated entities and its joint ventures

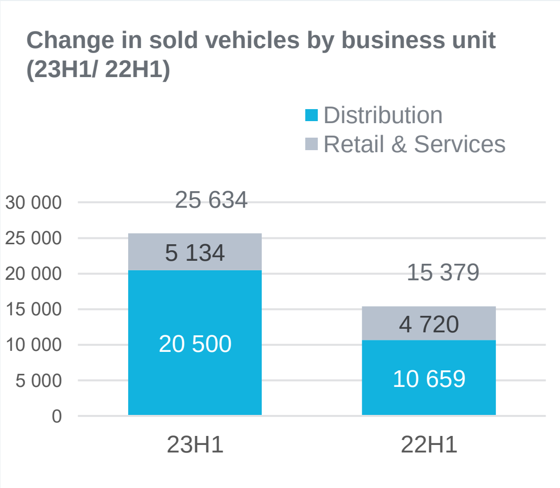
- The Hungarian import of Renault and Dacia vehicles was added to the Group's activities in 2022Q4. RN Hungary Kft., the entity engaged in the import of Renault and Dacia vehicles, sold a total of 5,998 cars in 2023H1. As a result, it earned a total revenue of HUF 45.8 billion, an EBITDA of HUF 2.27 billion and a profit before tax of HUF 2.24 billion.
- With this new activity included, in total the Group sold 25,634 motor vehicles in 2023H1. Taking all vehicle sales into account, the Group generated revenues of over HUF 240 billion in 2023H1. The total revenue of HUF 240 billion earned by the Group's consolidated entities and its joint ventures was coupled with an EBITDA of HUF 12.6 billion and a profit before tax of HUF 10 billion.

Note: In order to present the Group's total market presence (total revenue from motor vehicles sold with the direct involvement of the Group and the related profit or loss), the Group's consolidated profit under IFRS and the revenues and profits of the Group's joint ventures for the relevant part of the period are presented on this slide in a consolidated manner. Therefore, the revenue and profit figures shown on this slide of the investor presentation are not based solely on the Group's 2023Q2 consolidated financial statements prepared in accordance with the IFRSs adopted by the EU.









AutoWallis GROUP

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03 Annexes

The annexes to the flash report for 2023H1 are available on our website

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