

Investor Day

Gábor Ormosy, CEO

25 September 2025



Agenda



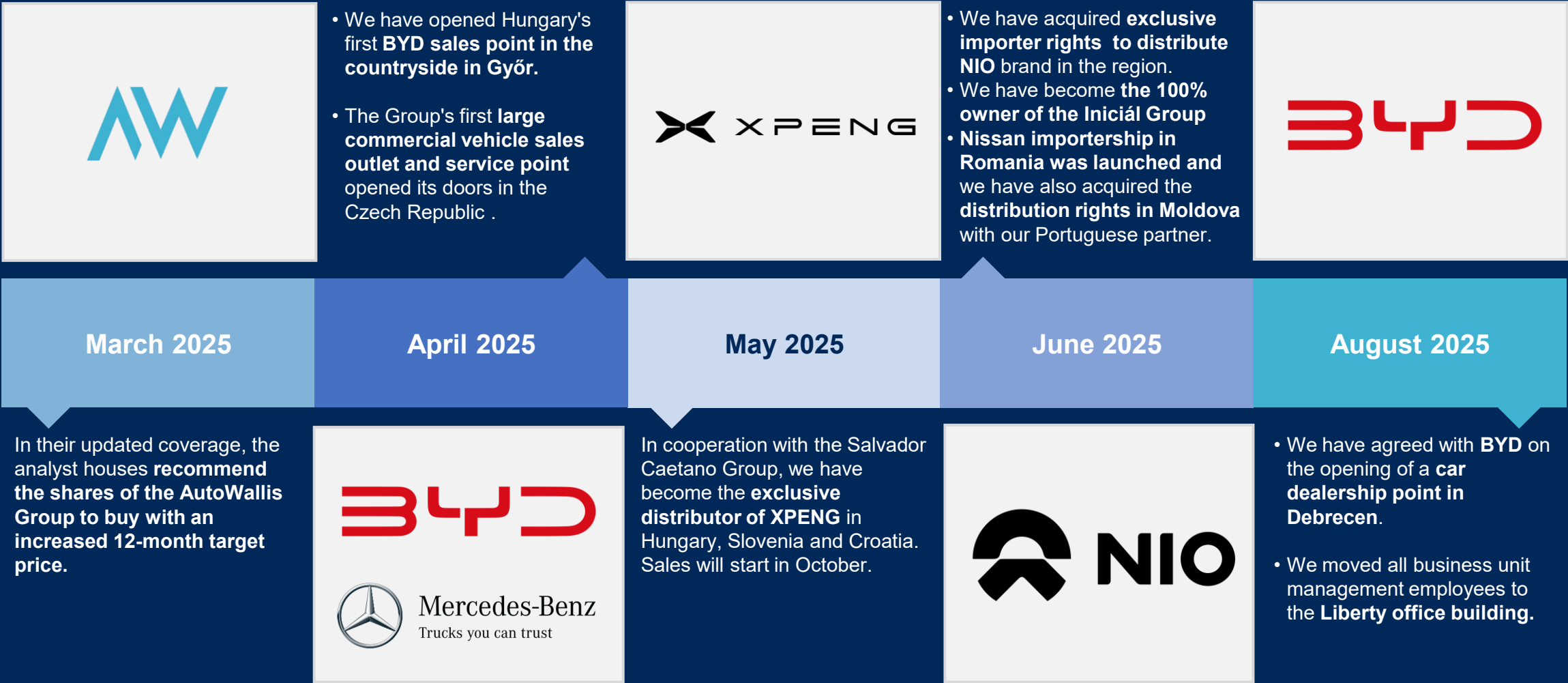
- 01 Highlights of the recent period
- 02 Our performance in H1 2025
- 03 Automotive industry outlook & trends shaping our future
- 04 Strategic goals for growth
- 05 Capital market results and plans



01

Highlights of the recent period

Highlights of the recent period



02

Our performance in H1 2025



The most important results of the first half of 2025

RECORD SALES AND PROFIT GENERATION IN THE SECOND QUARTER, SIGNIFICANTLY HIGHER THAN IN THE SAME PERIOD LAST YEAR

1

OEM campaigns, which were below last year's outstanding level, had a negative impact on our results, while acquisitions had a positive effect.

2

Further improving sales performance was eroded by normalizing margins and rising operating costs due to inflation.

3

As a result of the efficiency improvement measures taken, the Group was able to improve its profitability by the second quarter.



26,314 pieces
(2025 H1)

+3,4%

Vs.
2024 H1

VEHICLES SOLD



HUF 235 billion
(2025 H1)

+20,6%

Vs.
2024 H1

REVENUE



HUF 8.1 billion
(2025 H1)

-10%

Vs.
2024 H1

EBITDA



4.59 Ft/share
(2025 H1)

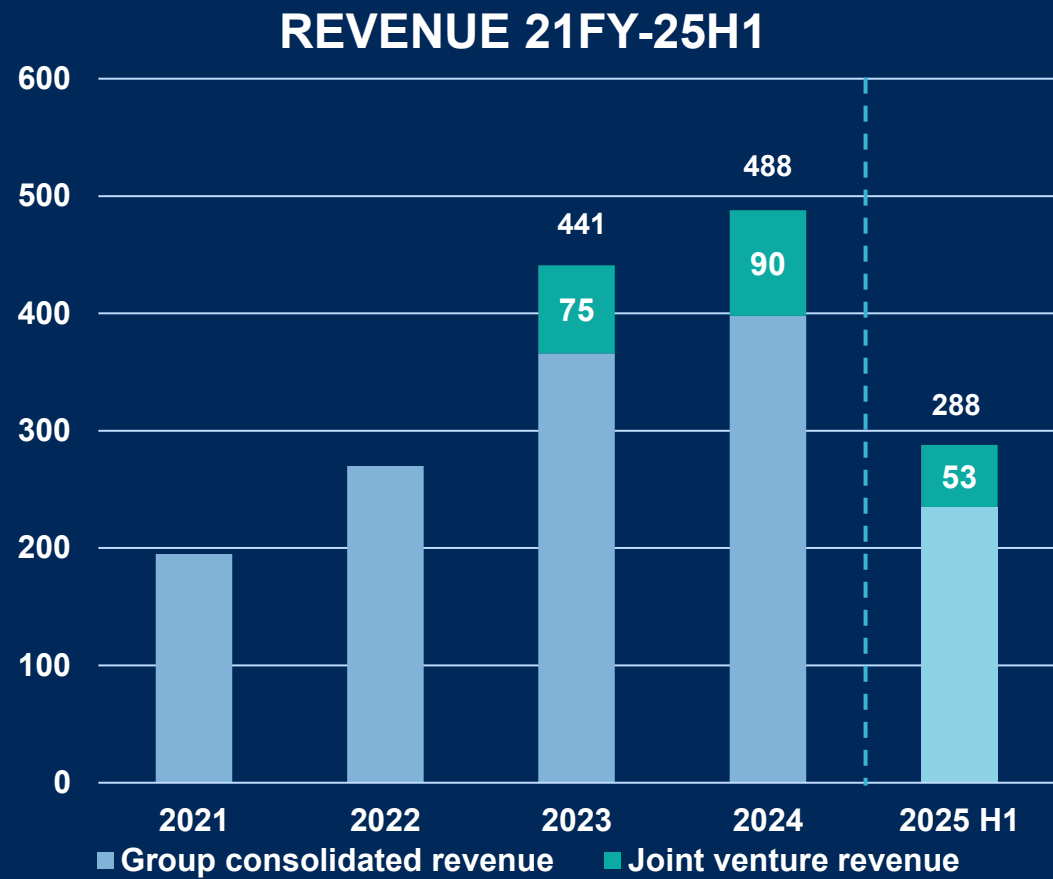
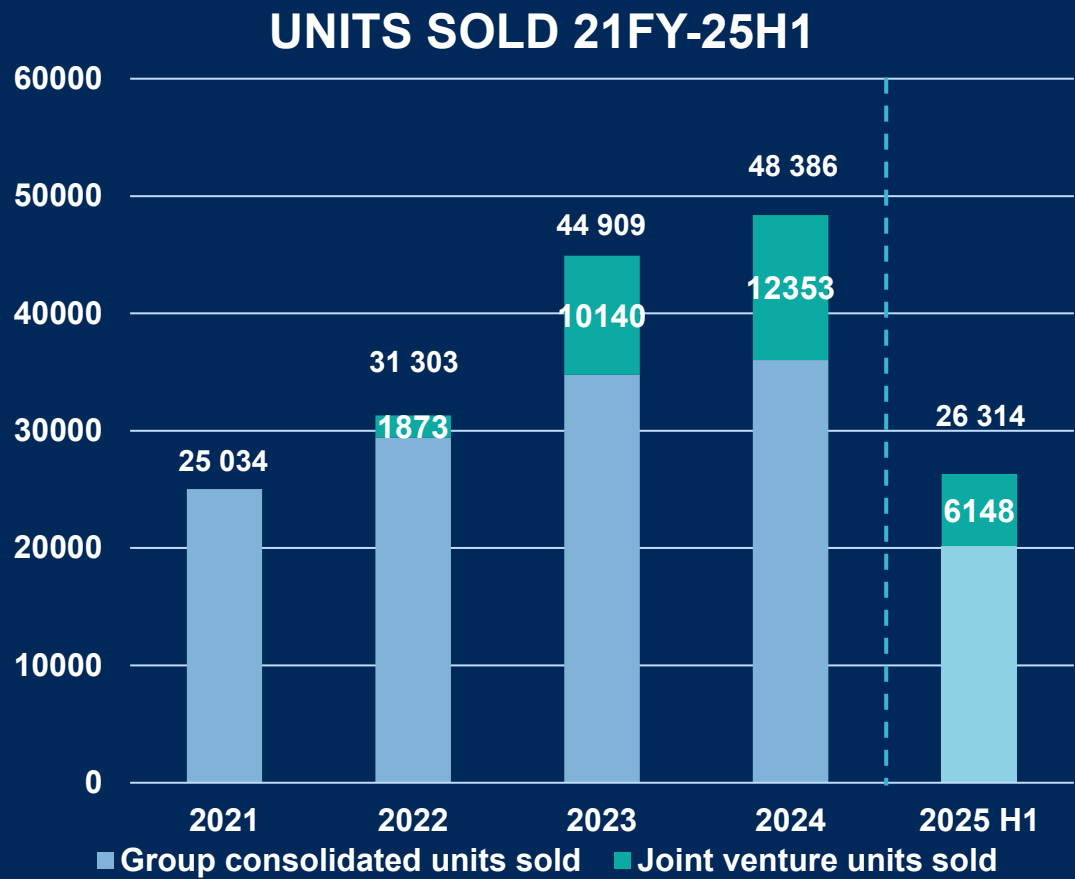
-25,5%

Vs.
2024 H1

EPS

Trends in our sales results

STRENGTHENED BY TRANSACTION GROWTH



Diverse activity portfolio and continuously expanding geographical coverage

CZECH REPUBLIC:



DISTRIBUTION



RETAIL



SLOVENIA:



DISTRIBUTION



RETAIL



HUNGARY:



DISTRIBUTION



RETAIL



MOBILITY



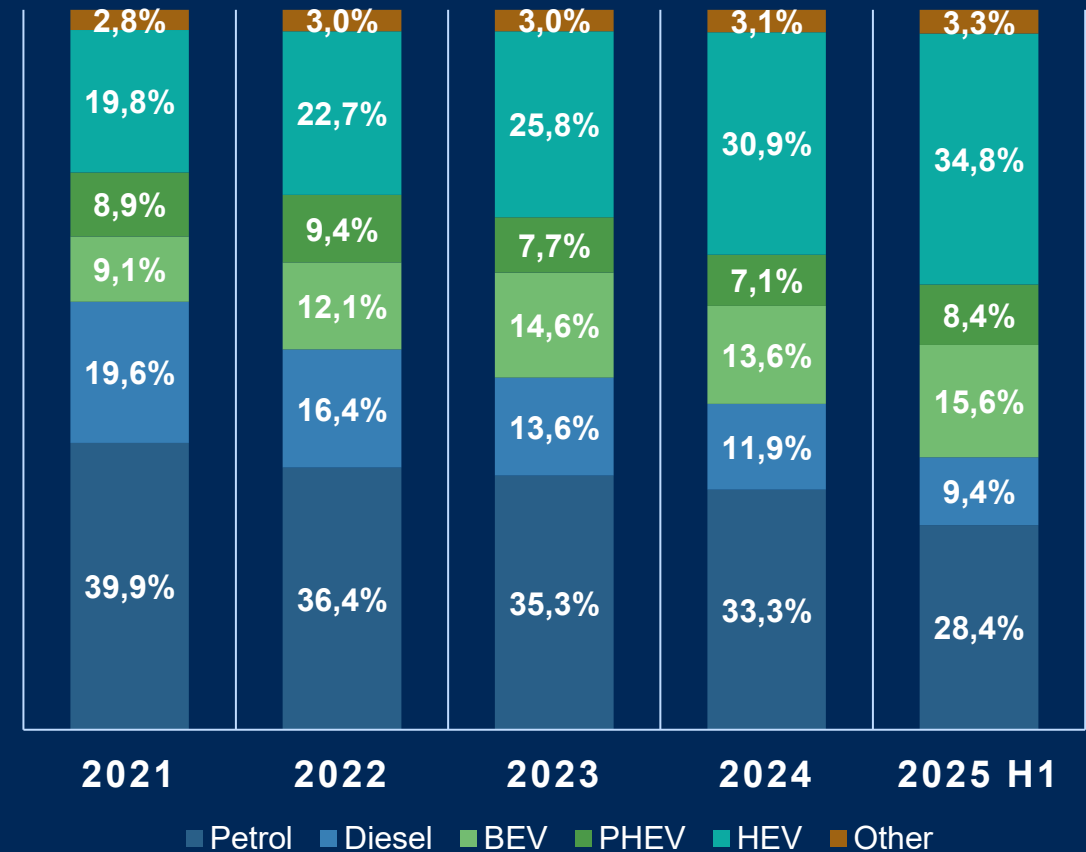


03

Automotive outlook

Ongoing structural transformation in new car sales in Europe

- 01** In recent years, the share of alternative (partly BEV, mostly hybrid) powertrains **has been steadily increasing**.
- 02** The CEE markets **are following European trends** with some delay.
- 03** **Despite the underdeveloped charging infrastructure**, the electrification growth trajectory can be seen in the markets of our region, and AutoWallis is taking advantage of this future growth with its expanding brand offering.
- 04** **Tax incentives and state subsidies** for car purchase and ownership play a significant role everywhere.



Tax benefits and purchase incentives for electric cars

	Tax benefits			State incentives	
	Buy	Ownership	Company car	Purchase	Infrastructure
Austria	✓	✓	✓	✓	✓
Bulgaria	✓	✓	✗	✗	✗
Czechia	✗	✓	✓	✓	✓
Greece	✓	✓	✓	✓	✓
Croatia	✓	✓	✗	✓	✓
Poland	✓	✓	✗	✓	✗
Hungary	✓	✓	✓	✓	✓
Romania	✗	✓	✗	✗	✗
Slovakia	✓	✓	✓	✗	✗
Slovenia	✓	✗	✓	✓	✗

Source: ACEA, 2025

Opportunity to be exploited: representation of the entry Chinese brands

- 01 Chinese **manufacturers are global market leaders** in the electric car segment due to technological innovation, cost-effectiveness and speed to market.
- 02 China is the **largest importer** in the European market, having further increased its share in 2024.
- 03 The 300 largest European car dealer groups represent **an average of 1.24 Chinese brands**, with the largest of them representing up to 6 brands.
- 04 The share of new Chinese brands **in the CEE markets is still relatively low**, so AutoWallis Group can use the advantage of pioneers to shape the image of the brands it represents.

In 2024, 55 Chinese brands were present in the European market (vs 61 non-Chinese)

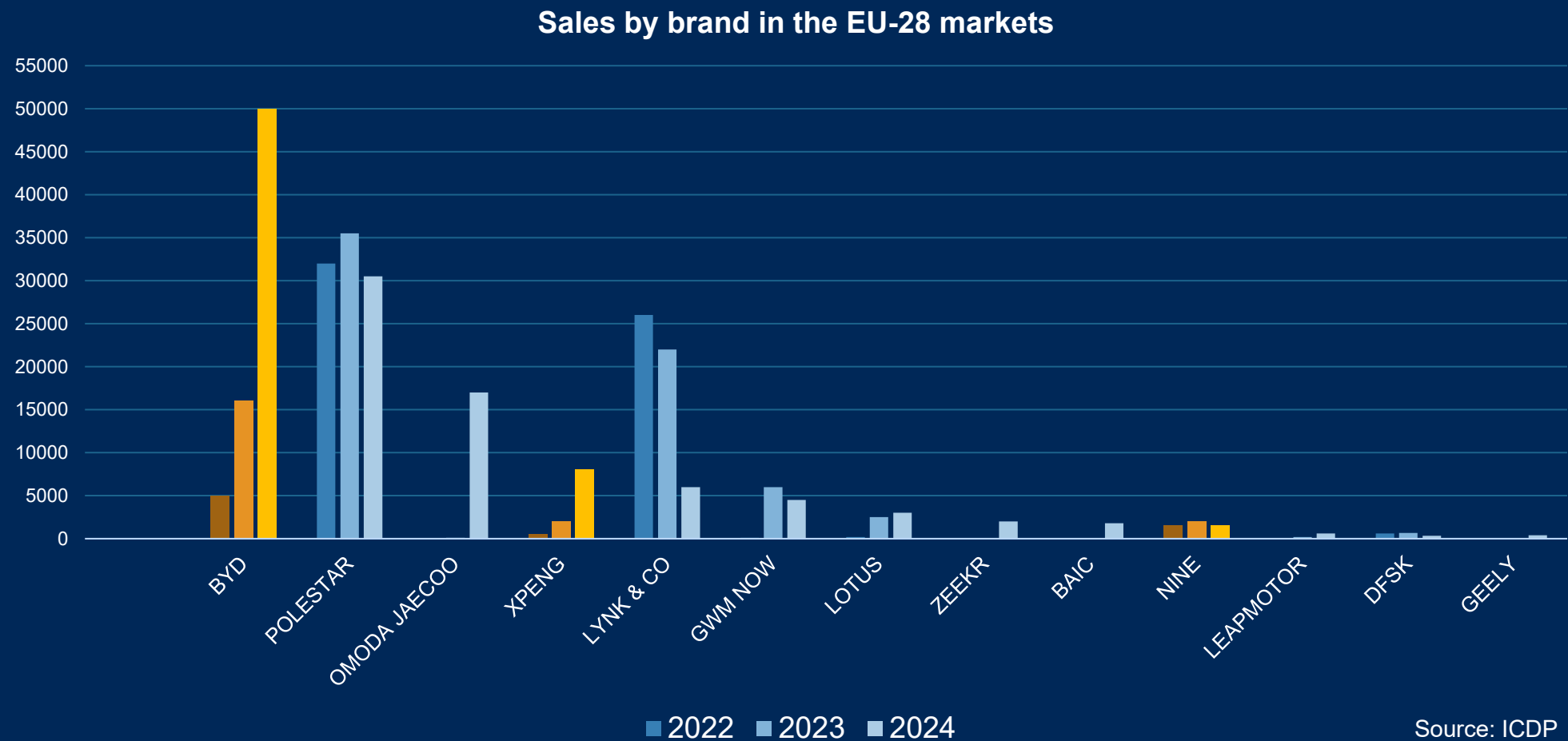
69% of Chinese brands entered the European market in 2024

Of these, only 14 brands have sold at least 1,000 cars in the EU

Tariffs on Chinese brands and intense competition increase selection

Source: ICDP

We believe in dynamically growing and premium entry brands



04

Strategic goals for growth



Internal improvements and further acquisitions are needed to exploit the full potential of industry trends

OPPORTUNITIES FOR FURTHER GROWTH



KEY ELEMENTS OF OUR STRATEGY



Further **acquisitions** and **business development**



Developing an **organization** that supports growth



Exploiting group **synergies** and **economies of scale**



Developing **digital skills** and **data assets**

Regional and business diversification in growth

AutoWallis Group pursues an **active and selective acquisition strategy** in addition to its **organic growth and business development** efforts.

The primary objective of our international growth strategy is to acquire **significant market shares** in the countries of the Central and Eastern European region.

The intensive growth phase lasting until 2026 is expected to be followed by an even more selective growth phase in 2027.



Distribution

Expanding existing brands into new markets

Representing emerging brands in the region



Retail

Independent expansion in strategic brands and markets

Expansion following the wholesale business unit's expansion strategy



Mobility services

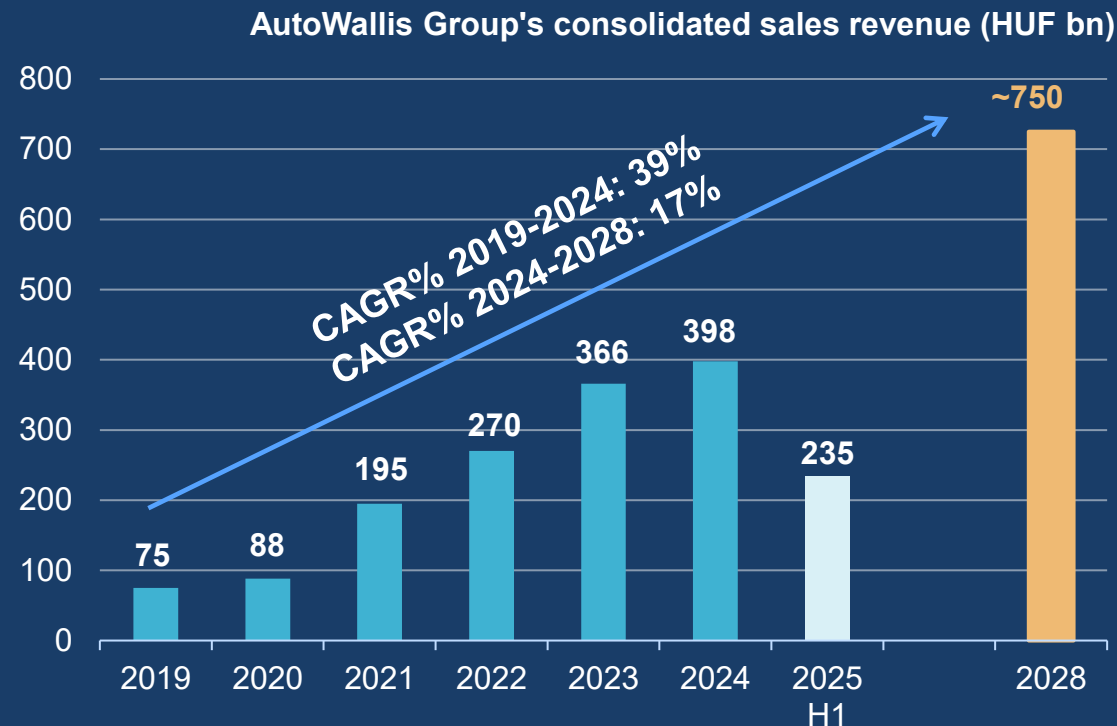
Broadening the range of services

Expansion in the markets of our retail business

We continue to expect sales figures to exceed last year's

Based on its updated growth strategy plan, **AutoWallis Group will more than double its 2023 revenue to ~ HUF 750 billion by 2028, with more than 50 percent of this coming permanently from foreign markets.**

With this roadmap, the number of **vehicles sold by the group could reach ~100 000 units.**

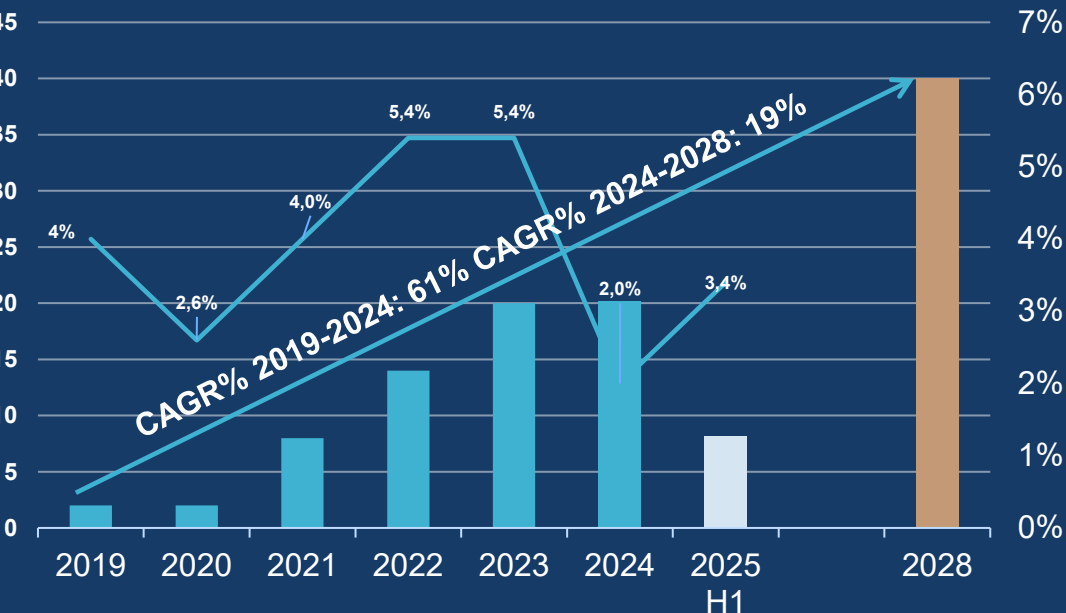


Source: issuer's IFRS annual consolidated accounts and own data;

Note: the plan figures presented exclude the figures for collaborations in the form of joint ventures.

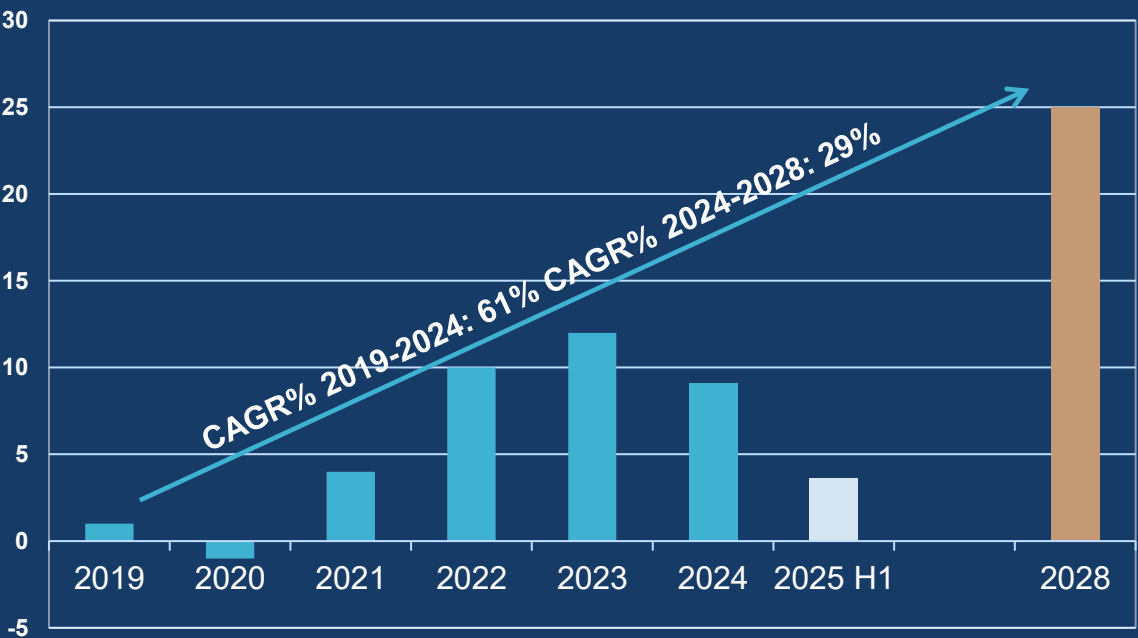
By improving our efficiency, we are returning to our performance targets

EBITDA & EBITDA% 2019-2025 H1 Fact & 2028 Plan
(HUF billion)



Source: issuer's IFRS annual consolidated accounts and own data

PBT 2019-2025 H1 fact & 2028 plan
(HUF billion)



Source: issuer's IFRS annual consolidated accounts and own data

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Capital market results and plans



Capital market overview

Reliable member of BUX and BUMIX

The AutoWallis share has been a member of the BUX and BUMIX indices and the BSE Premium category since 2019, and we have met the related expectations every six months.

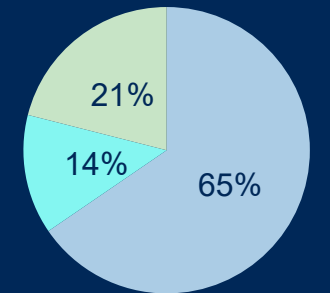
Successful IPO in 2021

The 2021 IPO resulted in the largest retail subscription of the last 10 years of the period in the amount of HUF 10 billion.

Diversifying shareholder composition

We have 4500 shareholders (in the mid-cap category that puts us in the TOP5), 64 different funds and portfolios currently have AW shares.

Composition of shareholders



- WALLIS Group
- Institutional investors
- Retail investors

Growing analyst coverage

Four analyst houses now follow our stock with regularly updated analysis (the only one in the mid-cap category), and our financial position is rated by the Scope rating. Our goal remains to increase our analyst coverage. Currently, [OTP](#) offers our shares for purchase at a target price of HUF 210, [MBH](#) at HUF 210 and [Concorde](#) at a target price of HUF 200. Erste's analysis will be published on 25 September.

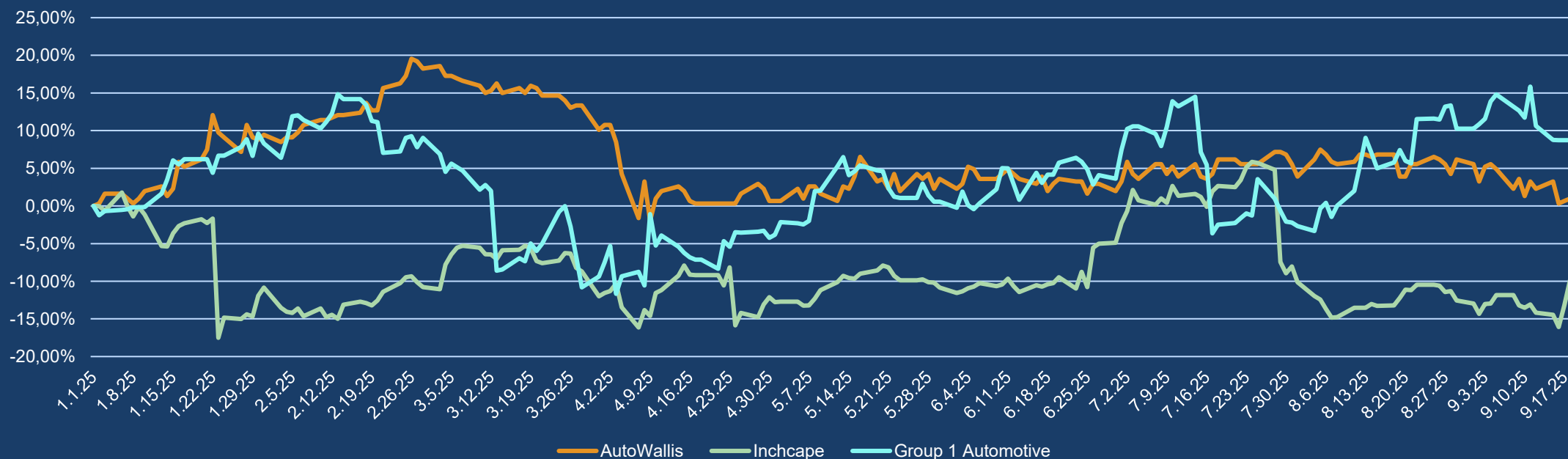
Increasing stock market turnover

In terms of trading volume, we were in the top 15 out of 70 listed companies in Hungary every month this year as well, and in August we were in the TOP10.

Sideways exchange rate due to unfavorable industry perception

Due to the unfavorable perception of the industry, AutoWallis's share price goes sideways like that of its major European competitors listed on the London and New York stock exchanges, also having a negative impact on the valuation of shares. Due to the global tariff war, expectations are temporarily gloomier, but for those who believe in the industry and our region, AutoWallis' CEE portfolio with a regional focus and diversification in terms of brands is a good investment.

AutoWallis, Inchcape, and Group 1 Automotive Changes in January-August 2025



Source: Bloomberg

AutoWallis

DRIVING TOGETHER



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