

ANALYST CONSENSUS

AutoWallis

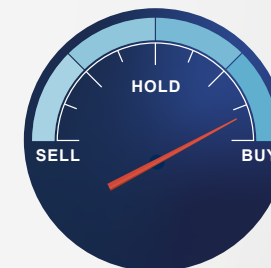
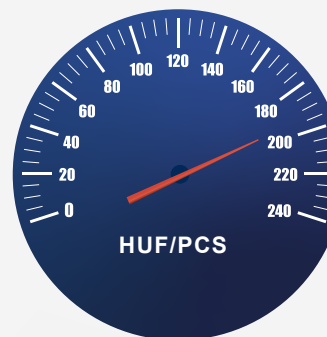
Date (last update): 21-05-2026

AutoWallis share 1-year target price: 195 HUF (average)

Number of analyses: 4

Analyst House	latest research	recommendation	target price
Concorde	2026.05.21	BUY	180 HUF
ERSTE	2026.05.21	BUY	202 HUF
MBH	2026.05.21	BUY	200 HUF
OTP	2026.05.21	BUY	198 HUF

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Full analyst consensus (million HUF)	2025	2026 Consensus					2026	2027 Consensus					2027	2028 Consensus					2028
	actual	OTP	MBH	ERSTE	Concorde	Average	OTP	MBH	ERSTE	Concorde	Average	OTP	MBH	ERSTE	Concorde	Average			
Revenue	477.432	511.065	508.332	501.115	508.707	507.305	541.729	538.524	535.112	538.636	538.500	562.155	570.876	570.728	567.212	567.743			
COGS	-390.846	-421.117	-419.717	-451.190	-488.688	-445.178	-445.843	-443.972	-482.826	-516.298	-472.235	-462.951	-469.899	-514.538	-542.026	-497.354			
Interest income from lease receivables	1.745	2.030	2.169	3.610			2.091	2.239	3.792			1.938	2.289	3.982					
Material cost	-16.413	-12.632	-13.149				-13.001	-13.831				-16.400	-14.655						
Services used	-26.391	-28.109	-26.188				-29.795	-27.414				-31.103	-29.039						
Personnel expenses	-25.977	-26.132	-25.838	-26.630			-27.122	-27.129	-28.334			-28.003	-28.743	-30.059					
Other income (expenses)			-895	-4.407	183			-861	-4.910	187			-907	-5.089	191				
EBITDA	18.852	24.471	24.713	24.851	20.203	23.560	27.458	24.556	25.426	22.526	25.742	31.440	29.922	27.864	25.376	28.651			
Depreciation	-7.666	-7.487	-8.497	-7.963	-8.139	8.022	-8.217	-8.544	-8.414	-8.618	-8.448	-7.119	-8.620	-8.773	-9.075	-8.397			
EBIT	11.060	16.984	16.216	16.888	12.063	15.538	19.241	19.011	17.012	13.908	17.293	24.321	21.303	19.091	16.301	20.254			
Financial result	-3.154	-3.562	-3.687	-3.584	-4.497	3.833	-3.489	-3.692	-3.472	-4.650	-3.826	-4.464	-3.695	-3.336	-4.554	-4.012			
Profit before tax	8.092	13.453	12.529	13.304	7.066	11.588	15.752	15.320	13.540	9.507	13.530	19.857	17.607	15.755	12.247	16.367			
Tax	-2.375	-2.555	-3.062	-2.656	-1.555	2.457	-3.386	-3.510	-2.814	-2.092	-2.951	-4.567	-4.017	-3.141	-2.694	-3.605			
Net profit	4.923	10.898	9.467	10.644	5.512	9.130	13.344	11.810	10.725	7.416	10.824	15.290	13.591	12.614	9.552	12.762			
EBITDA margin	3,9%	4,8%	4,9%	4,9%	4,0%	4,6%	5,1%	5,1%	4,8%	4,2%	4,8%	5,6%	5,2%	4,9%	4,5%	5,1%			
EBIT margin	2,3%	3,3%	3,2%	3,4%	2,4%	3,1%	3,6%	3,5%	3,2%	2,6%	3,2%	4,3%	3,7%	3,3%	2,9%	3,6%			
EPS	10,7	20,0	17,6	20,0	10,2	16,9	24,7	21,9	20,1	13,7	20,0	28,0	25,2	23,7	17,7	23,7			
EV/EBITDA	7,9	6,0	7,0	6,5	7,4	6,7			6,3	6,6		5,5		5,6	5,7				
P/E	13,9	6,8		7,8	14,6				7,7	10,8		5,3		6,6	8,4				