

PRESENTATION OF PRELIMINARY FINANCIAL RESULTS FOR 2025



3 March 2026

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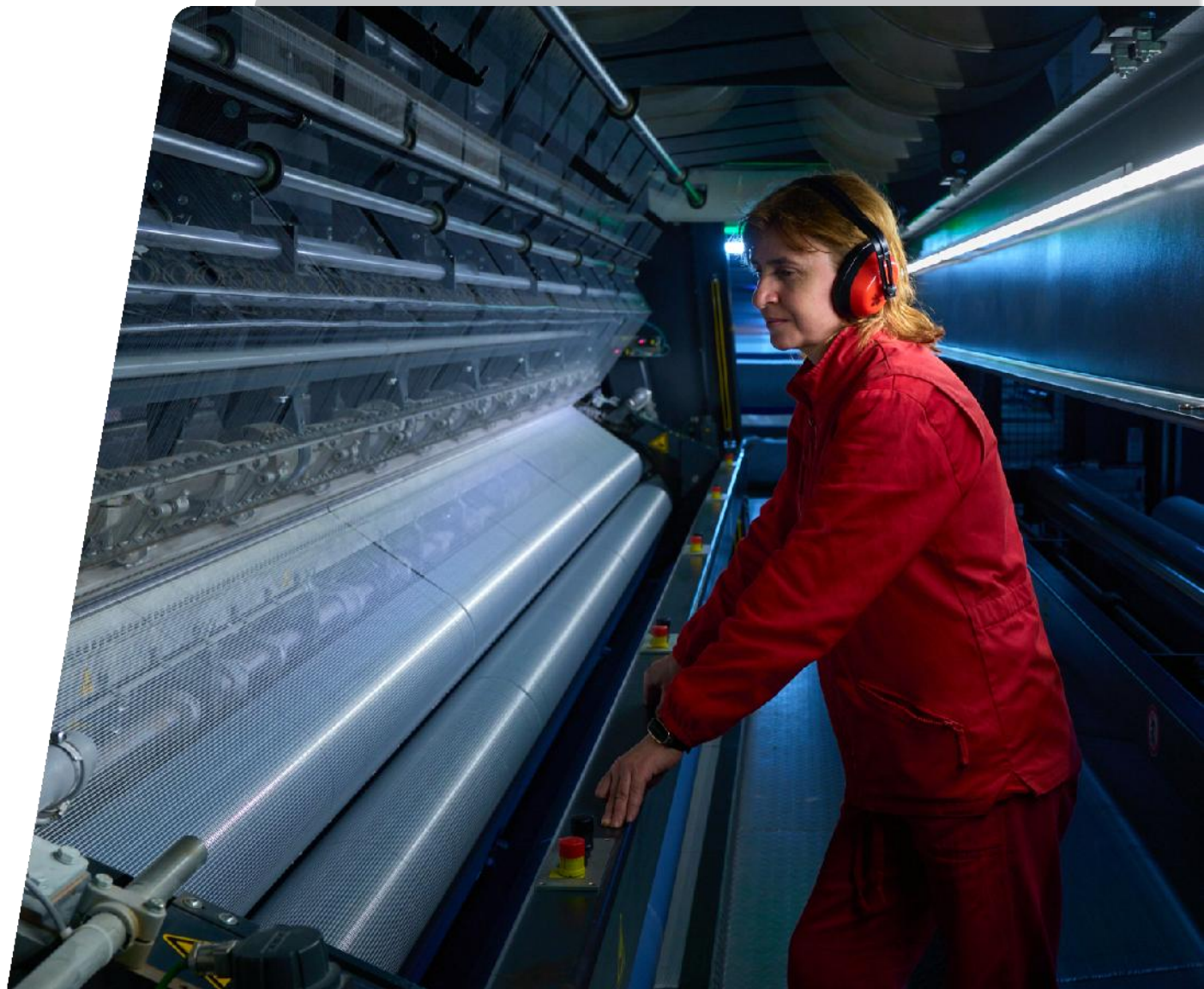
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1.

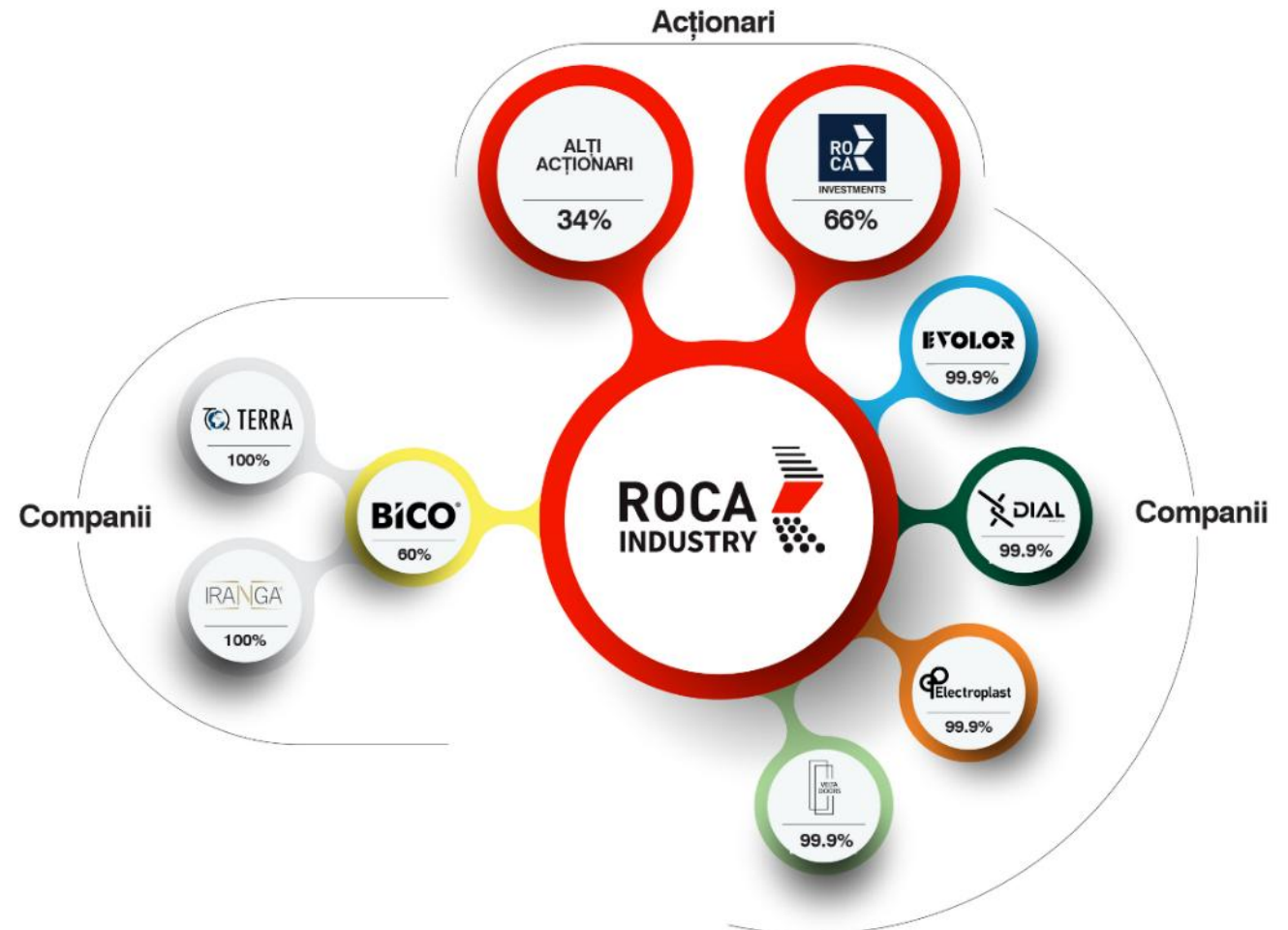
About ROCA Industry



ROCA Industry

Overview

- **Objective** – building an industrial ecosystem of Romanian companies with strong brands and regional growth potential
- A model built on **buy-and-build** principles, aimed at turning them into **regional champions**.
- A new Board of Directors elected for a 4-year term
- Changes in executive management
- **5 companies**
 - strong track record in executing investment projects
 - 2026 strategy: optimize performance, grow profitability



Investments in five sub-sectors

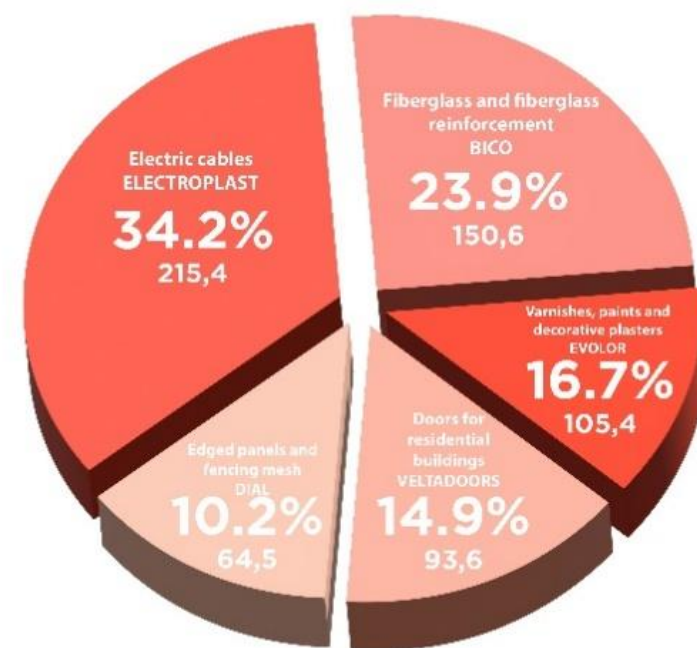
ROCA Industry covers 5 business sectors and directly or indirectly owns 7 companies

The 5 companies directly owned by the Holding operate in different business sub-sectors:

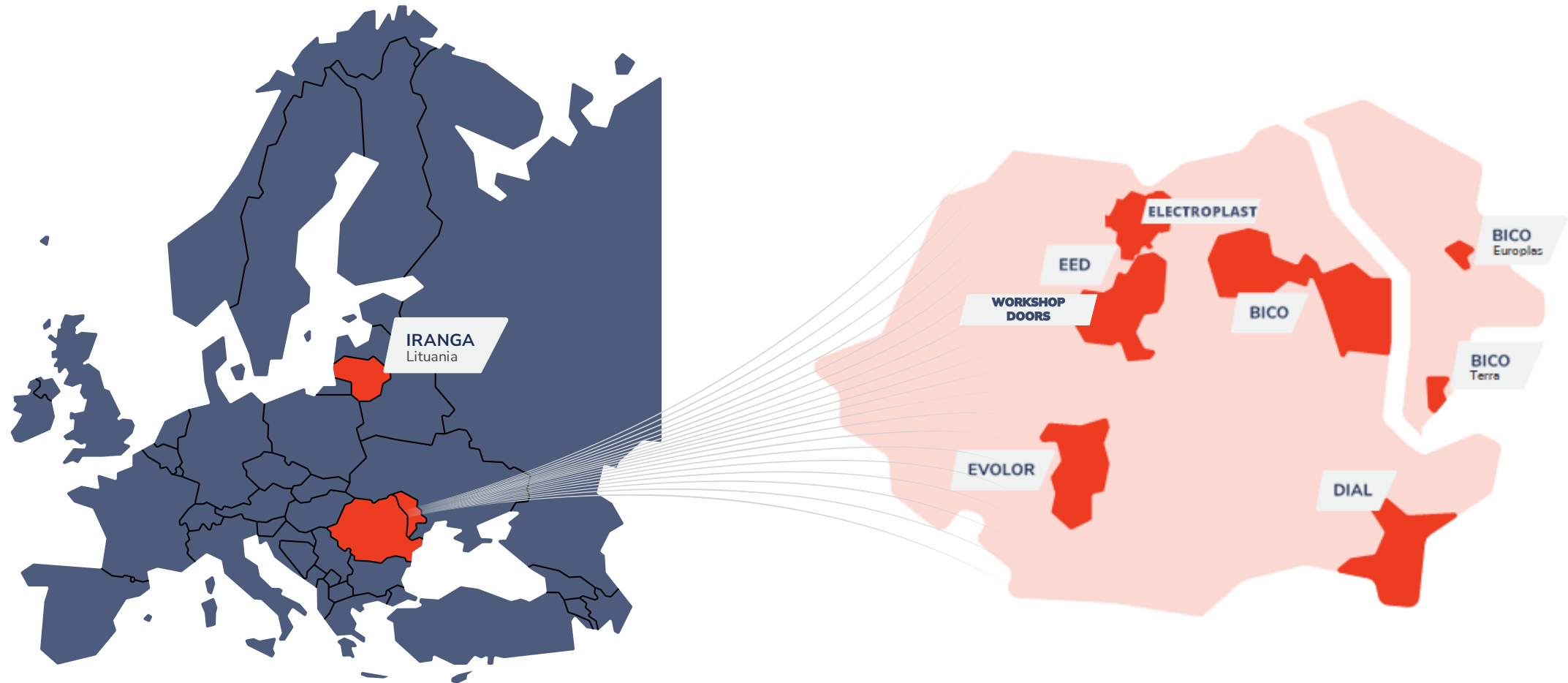
- **BICO Industries** - one of Europe's leading manufacturers of mesh and technical textiles;
- **EVOLOR** - one of the leading players in the paints and varnishes industry;
- **VELTADOORS** - Romania's largest manufacturer of doors for residential construction*;
- **DIAL** - one of the largest manufacturers of fence panels and fence mesh;
- **ELECTROPLAST** – one of the largest manufacturers of low-voltage copper and aluminium electrical cables.

* according to the 2024 Neomar study

The contribution of each business segment to the Holding's cumulative turnover (thousand RON) (preliminary 2025).



❖ 12 factories in 3 jurisdictions



2.

Subsidiaries Overview



• About ELP

One of the largest manufacturers of low-voltage copper and aluminium electrical cables

Operations:

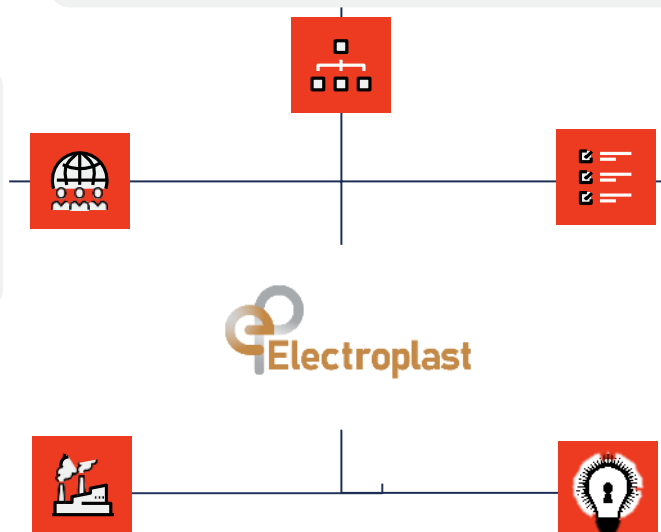
- **Leader** in the railway cable market
- **30 pieces of equipment and production lines**
- **3,600 cable types and sizes**
- **Testing laboratory** – modern, RENAR-accredited

Shareholders: ROCA Industry (99.99997%)

Owned since June 2023

Activity: production of low-voltage copper and aluminium electrical cables

In the market for over 30 years



Achievements:

- **Investment project** of approx. EUR 10 million – most of the equipment has been received; with no disruption to operations, production capacity up 20% vs 2024
- **Redesign of production flows** both logistically and in terms of process optimization
- **Solid** growth (sales volumes and financial performance)
- **Expansion** of the product range, including for export, with 2 new customers acquired in Germany and Latvia in the heavy-duty aluminium cable segment

Financial performance (IFRS financial statements, unaudited)

Revenue 2025: RON 215.4 million, +28.6% vs 2024

EBITDA 2025: RON 16.1 million, +42.3% vs 2024

Net profit 2025: RON 3.2 million, +180.5% vs 2024

Key short-term projects:

- Commissioning all new equipment to increase production capacity
- Launching the procurement process for Phase 3 equipment of the investment project
- Launching new product ranges and expanding distribution
- Tight control of direct costs (raw materials and new suppliers) and operational efficiency

• About BICO

One of Europe's leading manufacturers of mesh and technical textiles

Shareholders: ROCA Industry (60%), Mihai Bîrliba (40%)

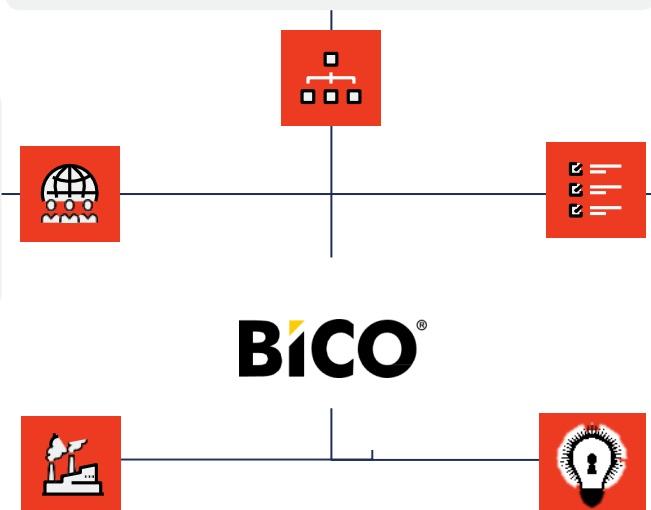
Owned since: September 2021

Activity: production of technical textiles, fibreglass mesh and corner beads for thermal insulation systems

In the market: for 20 years

Operations:

- 3 companies (Bico, Terra, Iranga)
- 5 factories
- 3 jurisdictions



Achievements:

- **Continuation** of the operational transformation process – reorganization of production in the mesh division, relocation of certain activities to the Republic of Moldova
- **Technological upgrade** of the facilities in the Republic of Moldova
- **Exports** at 63% of sales; weaker domestic and European demand
- **Diversification** of sales channels and opening of new ones; contracts signed with 2 DIY chains for export
- **Turbotex division** continues its 2024 growth trend, supported by the launch of the new BICOtwin range

Financial performance (IFRS financial statements, unaudited)

Revenue 2025: RON 150.6 million, -8.5% vs 2024

EBITDA 2025: RON 7.2 million, -64.4% vs 2024

Net loss 2025: RON 12.0 million, vs a profit of RON 4.0 million in 2024

Key short-term projects:

- Strengthening long-standing relationships with suppliers in Asia and the Middle East
- Optimizing sales by customer category, with a focus on premium and mid-range products
- Combining orders across product categories to increase appeal to customers
- Building additional production halls, completing efficiency projects for mesh and corner bead production, and commissioning new automated lines for fabricated textile products

• About EVOLOR

One of Romania's leading manufacturers of paints, varnishes and plasters

Operations:

- 2 factories
- 7 main production departments
- 2 well-known brands (STICKY and CORAL)
- 380 products, with national distribution and exports to the Republic of Moldova

Shareholders: Roca Industry (100%)

Owned since November 2021

Activity: production of paints, varnishes, enamels and plasters

In the market for over 30 years

Achievements:

- **Coral Barbie and Coral Hot Wheels** – focus on expanding to new customer segments and distribution channels
- Decorative paints **Coral Effetto** – significant volumes for a new range, expanded number of shades
- Launch of online sales via **eMag**
- **Stepping up** export activities to the Republic of Moldova and first steps towards expansion into Hungary and Bulgaria
- **Accelerated development** of the B2B channel, first steps in the B2C segment, consolidation of existing channels
- **Commissioning of two new silos** for solid raw materials and start-up of a platform for manufacturing mosaic-based products

EVOLOR

Financial performance (IFRS financial statements, unaudited)

Revenue 2025: RON 105.4 million, +3.4% vs 2024

EBITDA 2025: RON 14.4 million, +20.5% vs 2024

Net profit 2025: RON 4.3 million, +44.1% vs 2024

Key short-term projects:

- Developing more sustainable paint solutions
- Portfolio diversification and expansion into high-potential product categories
- Expanding commercial partnerships in B2B and export
- Strengthening the national network through the in-house distribution division and digitalizing the sales process
- Developing online sales
- Increasing awareness and visibility of the Evolor brand

• About DIAL

One of the largest manufacturers of fence panels and fence mesh

Shareholders: ROCA Industry (100%)
Owned: 100% since September 2022
Activity: production of fence panels and fence mesh
In the market for over 30 years

Operations:

- **Total land area:** 40,000 sqm
- **Factory:** 6,000 sqm
- **Over 200 products**

Achievements:

- **Launch** of new products for the agricultural sector and infrastructure projects
- Expansion of the accessories range (fixing systems and privacy screening solutions)
- **Partnership** with a major new DIY player in Romania (Altex)
- **Relevant projects** – fencing of the Mârșani and Plenița forests, sections of the A1 and A7 motorways, military sites, photovoltaic parks, the Cluj metro construction site and the new terminal at Craiova Airport
- **Growth** in export sales
- Continued optimization of production activities



Financial performance (IFRS financial statements, unaudited)

Revenue 2025: RON 64.5 million, -3.0% vs 2024
EBITDA 2025: RON 4.3 million, -40.0% vs 2024
Net loss 2025: RON 10.3 million, vs a profit of RON 1.3 million in 2024

Key short-term projects:

- Developing cooperation with DIY retail chains, including expanding presence in Western Europe (advanced discussions with a major DIY retail chain in Austria, Poland and Germany)
- Organic growth in traditional distribution through new partners
- Improving the product mix
- Streamlining procurement and commercial offers

About VELTA

Romania's largest manufacturer of doors for residential construction

Shareholders: ROCA Industry (100%)
Owned since: December 2024 (EED & WD merger)
Activity: production of interior doors for residential buildings

Operations:

- **3 factories** (25,000 sqm in total)
- **Production capacity** of approx. 1 million doors/year
- **Fully automated painting line** with 3 robots
- **3 product categories** (economy, mid-range, premium)

Achievements:

- Continued integration process
- Strengthened **presence** in DIY and traditional trade channels
- **Launch of the** premium Arcadia Doors range in 2 Mobexpert stores and of a door line for children's rooms
- **Expansion** of the slatted panel portfolio (monthly orders tripled)
- Improved **operational** and quality processes, optimizing packaging and complaint traceability
- **Full digitalization** of operations through ERP system implementation
- **Reorganization** of production flows and higher productivity without increasing headcount

Financial performance (IFRS financial statements, unaudited)

Revenue 2025: RON 93.7 million, -5.0% vs 2024

EBITDA 2025: RON 11.4 million, -44.2% vs 2024

Net loss 2025: RON 4.1 million, vs a profit of RON 6.1 million in 2024

Key short-term projects:

- Launching new value-added product ranges, especially in the slatted panel range
- Expanding the distribution network with key partners and internationally (advanced negotiations with one of the largest retail chains in Western Europe)
- Optimizing and increasing production capacity

3.

2025 Financial Results



2025 Consolidated Financial Results (IFRS)

IFRS income statement indicators	2025 results (RON thousand)			EBITDA margin 2025	Net result margin 2025	Variation 2025 vs 2024		
	Revenue	EBITDA	Net result			Revenue	EBITDA	Net result
EVOLOR	105,418	14,420	4,268	13.7%	4.0%	3.4%	20.5%	44.1%
BICO GROUP	150,586	7,214	(12,017)	4.8%	-8.0%	-8.5%	-64.4%	-400.3%
DIAL	64,487	4,256	(10,273)	6.6%	-15.9%	-3.0%	-40.0%	-905.7%
ELECTROPLAST	215,427	16,064	3,150	7.5%	1.5%	28.6%	42.3%	180.6%
VELTADOORS	93,650	11,422	(4,129)	12.2%	-4.4%	-5.0%	-44.2%	-168.1%
<i>Total companies</i>	<i>629,567</i>	<i>53,375</i>	<i>(19,001)</i>	<i>8.5%</i>	<i>-3.0%</i>	<i>5.1%</i>	<i>-24.9%</i>	<i>-223.2%</i>
ROCA INDUSTRY	-	(8,168)	(10,665)	N/A	N/A	N/A	7.4%	11.7%
<i>Consolidated total</i>	<i>629,567</i>	<i>45,206</i>	<i>(29,665)</i>	<i>7.2%</i>	<i>-4.7%</i>	<i>5.1%</i>	<i>-28.8%</i>	<i>-604.8%</i>

❖ 2025 Consolidated Revenue (IFRS)

Revenue breakdown	2025	2024	Variation 2025 vs 2024
Revenue by product line			
Fiberglass and fiberglass reinforcement (BICO)	150,585,673	164,602,011	-8.5%
Varnishes, paints and decorative plasters (EVOLOR)	105,418,050	101,969,987	3.4%
Doors for residential construction (VELTADOORS)	93,649,822	98,608,996	-5.0%
Fencing panels and wire mesh (DIAL)	64,486,986	66,475,618	-3.0%
Electric cables (ELECTROPLAST)	215,426,800	167,525,607	28.6%
TOTAL	629,567,331	599,182,219	5.1%

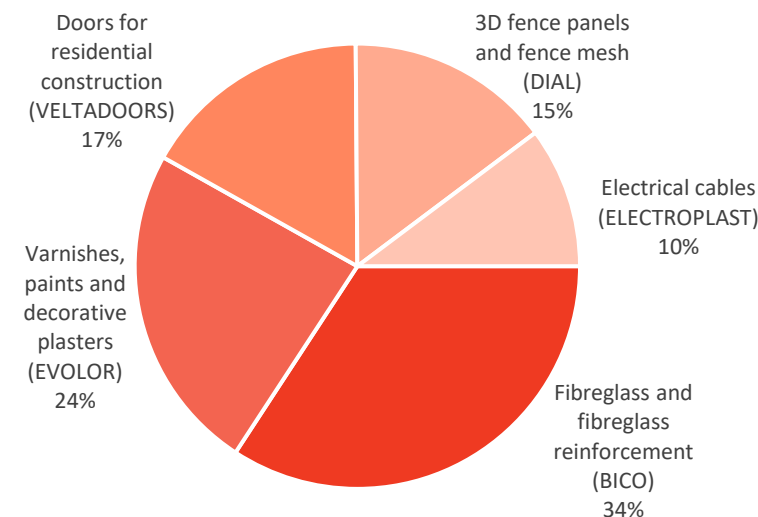
The strategic advantage of a diversified holding: the ability to balance financial performance at group level, mitigating the risks generated by market volatility in certain segments:

- three companies reported revenue declines (vs 4 companies in H1 2025);
- the performance of Electroplast and Evolor offset these declines.

Revenue up 5.1% vs FY 2024 (compared with -1.1% in H1 2025 vs H1 2024 and -4.4% in Q1 2025 vs Q1 2024) confirms the impact of the operational efficiency measures and the investment projects implemented in the first part of the year.

Sales to customers in Romania accounted for 79.8% (RON 502.4 million), with the remaining sales generated mainly by BICO Group (78.4% of total exports), with partners in countries such as Italy, Germany, Greece, Poland, Bulgaria, Portugal and Croatia.

Revenue breakdown by segment



2025 Consolidated EBITDA (IFRS)

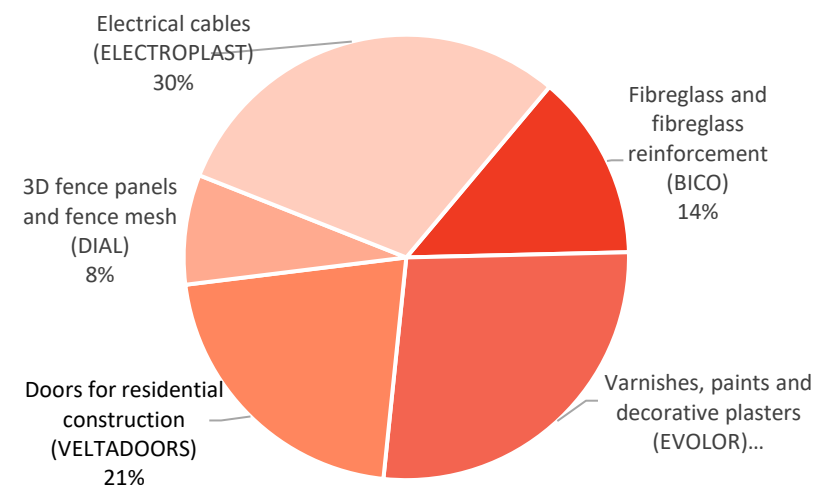
EBITDA breakdown	2025	2024	Variation 2025 vs 2024
EBITDA by product line			
Fibreglass and fibreglass reinforcement (BICO)	7,213,556	20,235,019	-64.4%
Varnishes, paints and decorative plasters (EVOLOR)	14,419,777	11,967,069	20.5%
Doors for residential construction (VELTADOORS)	11,421,552	20,479,348	-44.2%
Fencing panels and wire mesh (DIAL)	4,255,956	7,093,995	-40.0%
Electric cables (ELECTROPLAST)	16,063,777	11,285,058	42.3%
EBITDA of production companies	53,374,619	71,060,489	-24.9%
ROCA Industry – standalone	(8,168,198)	(7,605,607)	7.4%
Consolidated EBITDA	45,206,421	63,454,882	-28.8%

EBITDA at consolidated level also includes the operating expenses of the holding company, which has no operating activity of its own – EBITDA margin of 7.2%.

All production companies in the Group reported positive EBITDA, with **EBITDA margins** ranging from 4.8% (BICO Group) to 13.7% (EVOLOR), reflecting the impact of a mix of economic and political factors.

BICO's results had a significant negative impact (mainly due to anti-dumping duties on yarn imports from China – an additional cost of approximately RON 6 million), which could not be passed on to selling prices. Excluding the impact of BICO, the difference would have been RON -4.6 million.

Adjusted EBITDA breakdown by segment



The Group maintains its operational, commercial and financial development strategy, which involves:

- growth through investment (CAPEX),
- integration of the companies that have completed mergers,
- launching new products, maximizing existing distribution channels and identifying new sales channels.

❖ 2025 Consolidated Pre-Tax Result (IFRS)

Pre-tax result breakdown by segment	2025	2024
Pre-tax result by product line		
ROCA Industry	(10,612,339)	(9,542,083)
Fibreglass and fibreglass reinforcement (BICO)	(11,985,892)	4,929,698
Varnishes, paints and decorative plasters (EVOLOR)	4,767,370	3,368,285
Doors for residential construction (VELTADOORS)	(4,000,344)	6,116,836
Fencing panels and wire mesh (DIAL)	(10,319,960)	1,269,799
Electric cables (ELECTROPLAST)	3,167,541	1,345,693
	(28,983,624)	7,488,228

Below the EBITDA line, the following factors had an impact:

- depreciation and amortization expenses (RON 43.1 million, +40.7% vs 2024, driven by the full acquisition of Workshop Doors and by investments to expand production capacity and improve operational efficiency), including value adjustments for certain intangible assets recognized upon the acquisition of BICO, DIAL and VELTADOORS by ROCA Industry, based on the valuation report prepared by an independent ANEVAR-authorized valuer;
- financial expenses (RON 24.0 million)

As a result, the Group recorded a **pre-tax loss of RON 29.0 million** at consolidated level, while **net loss amounted to RON 29.7 million, of which RON 26.1 million attributable to ROCA Industry.**

• 2025 Standalone Financial Results (IFRS)

P&L ANALYSIS

	2025 (preliminary, unaudited)	2024 (Audited)
Continuing operations		
Other operating income	2,843	1,086
Depreciation and depreciation	(201,158)	(168,607)
Employee benefit expenses	(3,617,807)	(3,501,601)
Advertising costs	(110,724)	(513,511)
(Impairment)/ reversal of impairment of investments	(10,942,000)	8,720,542
Other operating expenses	(4,442,505)	(3,591,583)
Other gains/(losses) - net	12,029	-
Operating profit/ (loss)	(19,299,322)	946,326
Finance income	10,598,236	10,650,412
Finance costs	(2,267,101)	(1,831,108)
Net finance income/ (loss)	8,331,135	8,819,304
Profit/(loss) before income tax	(10,968,187)	9,765,630
Income tax expense	(50,300)	(446)
Profit / (Loss) for the period from continuing operations	(11,018,487)	9,765,184
Total comprehensive income for the period	(11,018,487)	9,765,184
Earnings per share	(0.044)	0.040

Financial income of RON 10.6 million (vs RON 10.7 million):

- interest on loans granted to subsidiaries (RON 4.4 million in 2025 vs RON 4.9 million in 2024) and
- dividends distributed by subsidiaries (RON 6.2 million in 2025 from Velta Doors and BICO vs RON 5.8 million in 2024 from Workshop Doors).

2025 impairment of the investments held in BICO and VELTADOORS (RON 10.9 million), given the market context and the downward trend recorded in 2025, which may temporarily affect the companies' ability to generate value in the coming period. The valuation is being finalized.

Operating expenses (RON 8.4 million vs RON 7.8 million in 2024), mainly the holding's running costs – personnel expenses and expenses related to managing the portfolio companies. The increase was driven by additional costs related to audit, ESG and financial advisory.

Financial expenses +23.8% vs 2025 due to exchange rate depreciation, while interest costs remained at the same level (RON 1.8 million).

Net loss of RON 11.0 million (RON 76 thousand excluding the impairment of the investments in Veltadoors and Bico), vs a net profit of RON 9.8 million in 2024 (which included additional income of RON 8.7 million from the reversal of the impairment recorded for the investment held in BICO).

3.

2026 Budget



❖ 2026 Consolidated Budget (IFRS)

TOTAL (RON thousand)	Budget 2026	Actual 2025	Budget 2025	Budget 2026 vs Actual 2025 (%)	Budget 2026 vs Budget 2025 (%)	Actual 2025 vs Budget 2025 (%)
Revenue	751,735.1	629,567.3	716,178.6	19.4%	5.0%	-12.1%
Total direct costs	582,318.7	501,191.6	550,412.7	16.2%	5.8%	-8.9%
Gross margin	169,416.4	128,375.7	165,765.9	32.0%	2.2%	-22.6%
Gross margin %	22.54%	20.39%	23.15%	2.1 pp	-0.6 pp	-2.8 pp
Total indirect costs	92,093.9	83,169.7	96,921.8	10.7%	-5.0%	-14.2%
EBITDA	77,322.5	45,206.0	68,844.1	71.0%	12.3%	-34.3%
EBITDA %	10.29%	7.18%	9.61%	3.1 pp	0.7 pp	-2.4 pp
EBIT	42,319.5	11,019.0	35,961.1	284.1%	17.7%	-69.4%
EBIT %	5.63%	1.75%	5.02%	3.9 pp	0.6 pp	-3.3 pp
Net result	9,793.0	(29,475.0)	5,629.0	N/A	74.0%	N/A
Net result %	1.30%	-4.68%	0.79%	6.0 pp	0.5 pp	-5.5 pp

Revenue +20% compared to 2024, driven by:

- growth in sales volumes across subsidiaries;
- expansion of distribution channels, including export development;
- launch of new products and optimization of the product mix;
- the effect of investments made in previous years.

Direct costs – expenses involved in the subsidiaries' production process, evolving in line with revenue (+16% vs 2025)

EBITDA +71% above the 2025 actual, a year marked by atypical market conditions that limited the achievement of sales targets and generated cost pressures. Compared to the EBITDA level initially planned for 2025, the budgeted increase is only 12%.

The estimated EBITDA margin is 10.29%, 3.1 pp above the previous year (+0.7 pp above the 2025 budget), driven by sales growth as well as by investments in technological upgrades, integration-related costs and operational optimization, including the strengthening of the organizational structure at group level.

Consolidated net profit of RON 9.8 million. The difference between EBITDA and net profit is mainly due to:

- depreciation of tangible assets (investments in equipment and technology) and amortization of intangible assets (brands, customer relationships) identified following acquisitions;
- financial costs (mainly bank interest);
- income tax.

❖ 2026 Company Budgets & CAPEX (OMFP)

Key indicators estimated for 2026 (OMFP) -RON thousand-	EVOLOR	BICO GROUP	VELTADOORS	DIAL	ELP	TOTAL
Revenue	120,283.6	157,093.3	119,863.7	70,747.4	283,747.1	751,735.1
Gross margin	45,047.4	34,557.4	41,044.0	11,050.7	37,717.0	169,416.4
GM %	37.5%	22.0%	34.2%	15.6%	13.3%	22.5%
EBITDA	16,358.0	16,435.2	22,625.6	4,915.1	20,386.3	80,720.2
EBITDA %	13.6%	10.5%	18.9%	6.9%	7.2%	10.7%
Net result	761.0	2,019.8	5,244.1	-2,410.9	5,114.7	10,728.8
Net result %	0.6%	1.3%	4.4%	-3.4%	1.8%	1.4%

ROCA Industry's subsidiaries continue their technological upgrade and investments in equipment to support medium- and long-term development

Budget 2026	EVOLOR	BICO GROUP	VELTADOORS	DIAL	ELP	TOTAL 2026
Capex (RON)	1,799,800	25,781,960	3,410,195	-	6,247,500	36,475,023

❖ 2026 Standalone Budget (IFRS)

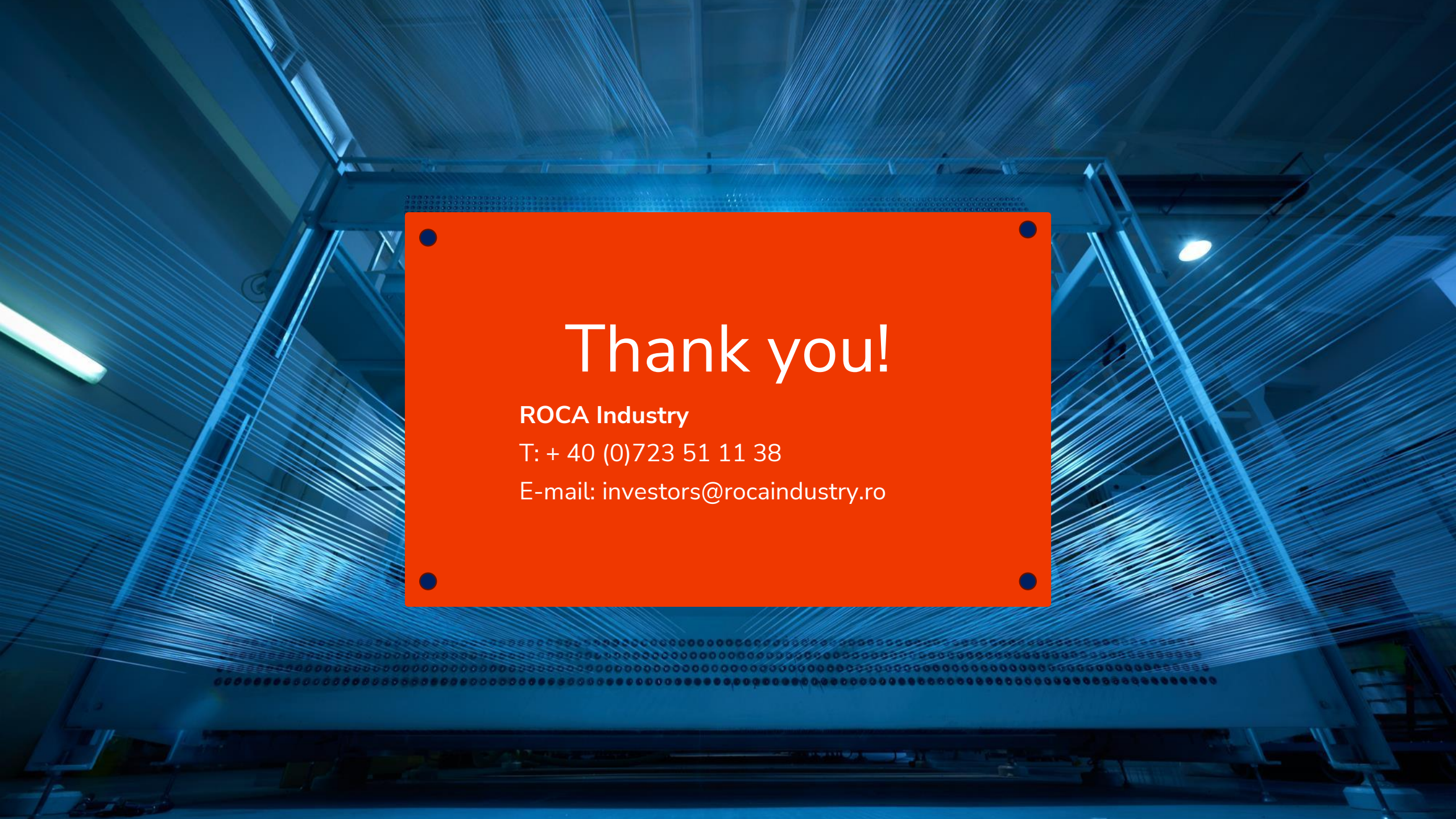
TOTAL (RON thousand)	Budget 2026	Actual 2025	Budget 2025	Budget 2026 vs Actual 2025 (%)	Budget 2026 vs Budget 2025 (%)	Actual 2025 vs Budget 2025 (%)
Operating revenue	-	-	-	N/A	N/A	N/A
Operating expenses	7,665.5	8,357.3	11,080.6	-8.3%	-30.8%	-24.6%
Impairment adjustment	-	(10,942)	-	N/A	N/A	N/A
Financial income	4,429.2	10,598.2	10,378.7	-58.2%	-57.3%	2.1%
Financial expenses	3,927.1	2,267.1	1,615.9	73.2%	143.0%	40.3%
Pre-tax result	(7,163.4)	(10,968.2)	(2,617.8)	-34.7%	173.6%	319.0%
Net result	(7,162.4)	(11,018.5)	(2,617.8)	-35.0%	173.6%	320.9%
Number of shares	248,672.2	248,672.2	248,672.2	0.0%	0.0%	0.0%
Earnings per share	(0.0288)	(0.0443)	(0.0105)	-35.0%	174.3%	321.9%

Financial income – interest income on loans granted (RON 4.4 million), with no dividend income (vs RON 6.1 million in 2025).

Financial expenses – interest on loans received (RON 3.9 million), +73.2% vs 2025, driven by the EUR 5 million loan received from the main shareholder, used to finance part of the purchase price paid for the additional 30% stake in Workshop Doors S.R.L.

Operating expenses (RON 7.7 million, -8%), which include:

- Salaries & remuneration of the Board of Directors;
- Investor relations and reporting obligations – managing investor relations and complying with specific legal and reporting obligations;
- Strategic marketing and business development – supporting the Holding's positioning and the communication of its progress; generating new business contacts and establishing strategic partnerships;
- ESG & sustainability – investments dedicated to implementing and monitoring ESG initiatives;
- Compliance and internal audit (financial and internal audit, valuations, legal services).



Thank you!

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