

Excellence in Workforce Management

ATOSS Software SE

Earnings Call Q1 2026 | 24. April 2026 2:00 PM CEST

The ATOSS logo is displayed on the side of a modern glass skyscraper. It consists of the word "ATOSS" in a bold, white, sans-serif font, followed by a stylized white hand icon with red and blue accents on the fingers. The building's facade is composed of a grid of dark window frames and reflective glass panels, set against a clear blue sky.

Disclaimer

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ATOSS Software SE 2026

Highlights Q1 2026

CFO Christof Leiber

ATOSS 

Key takeaways

Q1 2026

1

Solid Q1 2026 with strong margin development: Topline growth of 11% YoY, driven by 27% Cloud growth. 35% EBIT margin stands significantly above guidance

2

Overall positive order development despite geo-political and macro economical headwinds

- Strong ARR growth and solid Cloud & Subscriptions order backlog development
- Overall New ACV Q1 2026 at prior year level
- Healthcare sector gaining significant traction, with large projects won and additional projects in the pipeline

3

Positive progress in AI transformation: consistent execution across product roadmap and internal AI initiatives

4

Outlook 2026 – Revenue unchanged and EBIT margin uplified: FY revenue guidance of around €215m unchanged and EBIT margin guidance increased to at least 34%

Income statement (IFRS)

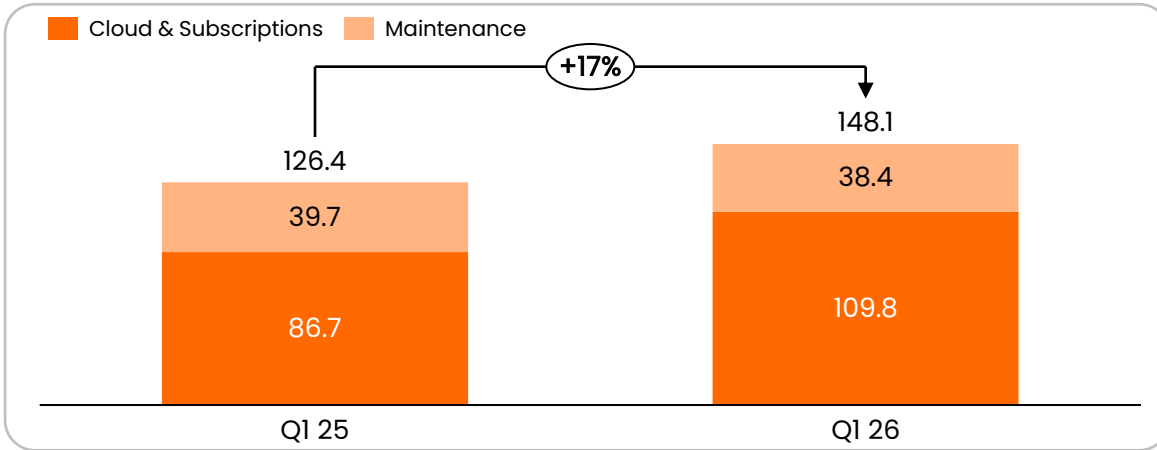
Q1 2026 vs. Q1 2025

EURk ¹	Q1 2026	% of total revenue	Q1 2025	% of total revenue	QoQ %
Total revenues	51,442	100%	46,251	100%	11%
Software	38,286	74%	34,029	74%	13%
Licenses	1,634	3%	2,714	6%	-40%
Maintenance	9,621	19%	9,959	22%	-3%
Cloud & Subscriptions	27,031	53%	21,356	46%	27%
Consulting	11,115	22%	10,035	22%	11%
Hardware	868	2%	1,144	2%	-24%
Others	1,173	2%	1,043	2%	12%
EBITDA	19,359	38%	16,721	36%	16%
EBIT	18,159	35%	15,581	34%	17%
EBT	18,914	37%	16,689	36%	13%
Net profit	12,796	25%	11,314	24%	13%
EPS in euro	0.80		0.71		13%

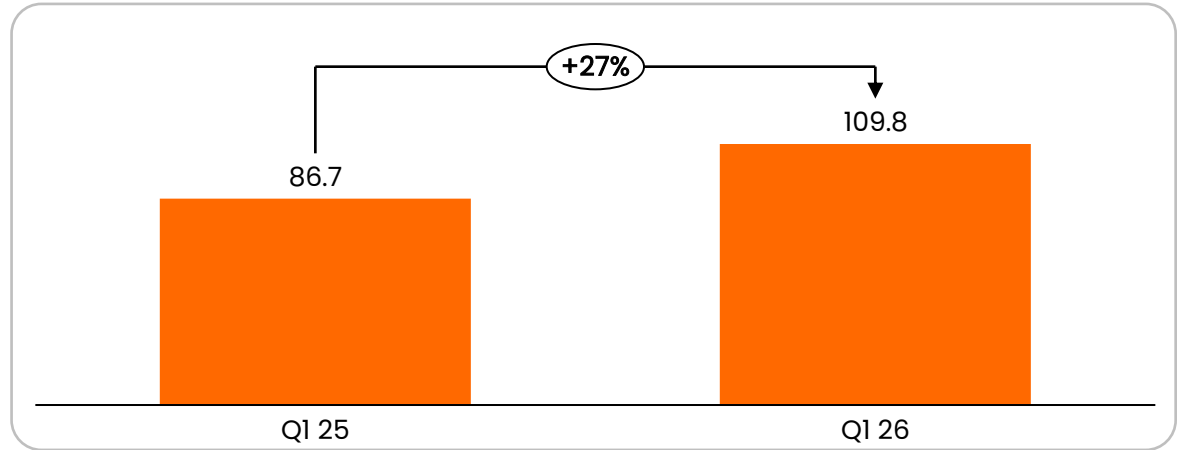
1. Figures may not sum exactly due to rounding differences.

Strong development of recurring revenues driven by Cloud & Subscriptions

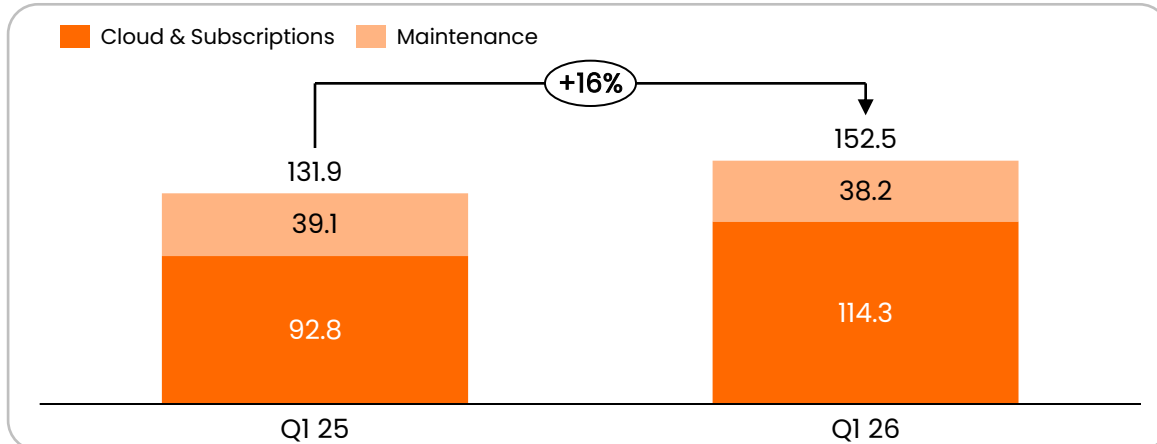
ARR Total (Cloud & Subscriptions + Maintenance) in EURm



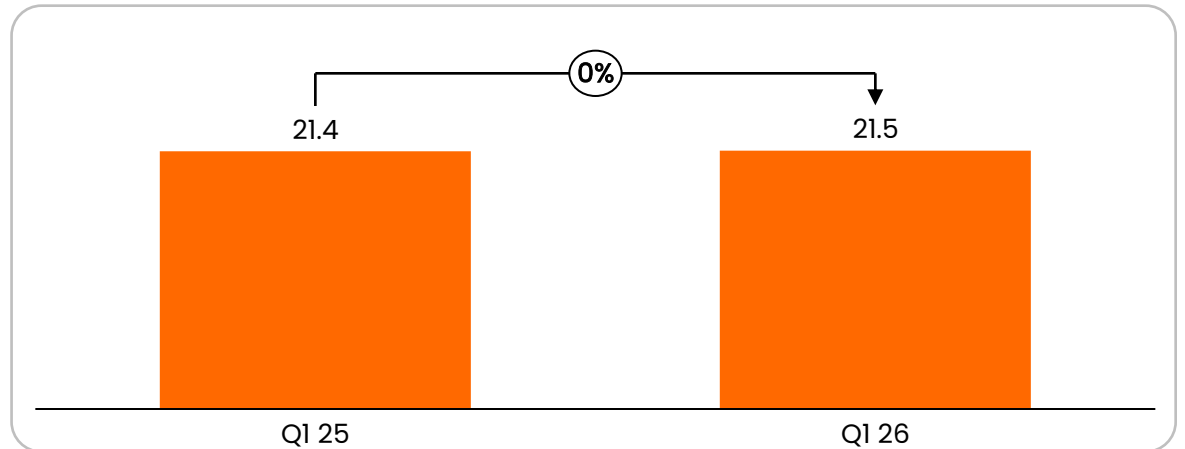
ARR Cloud & Subscriptions in EURm



ARR backlog Total (12 months)¹ in EURm



Incremental Cloud & Subs. order backlog added (YoY)² in EURm

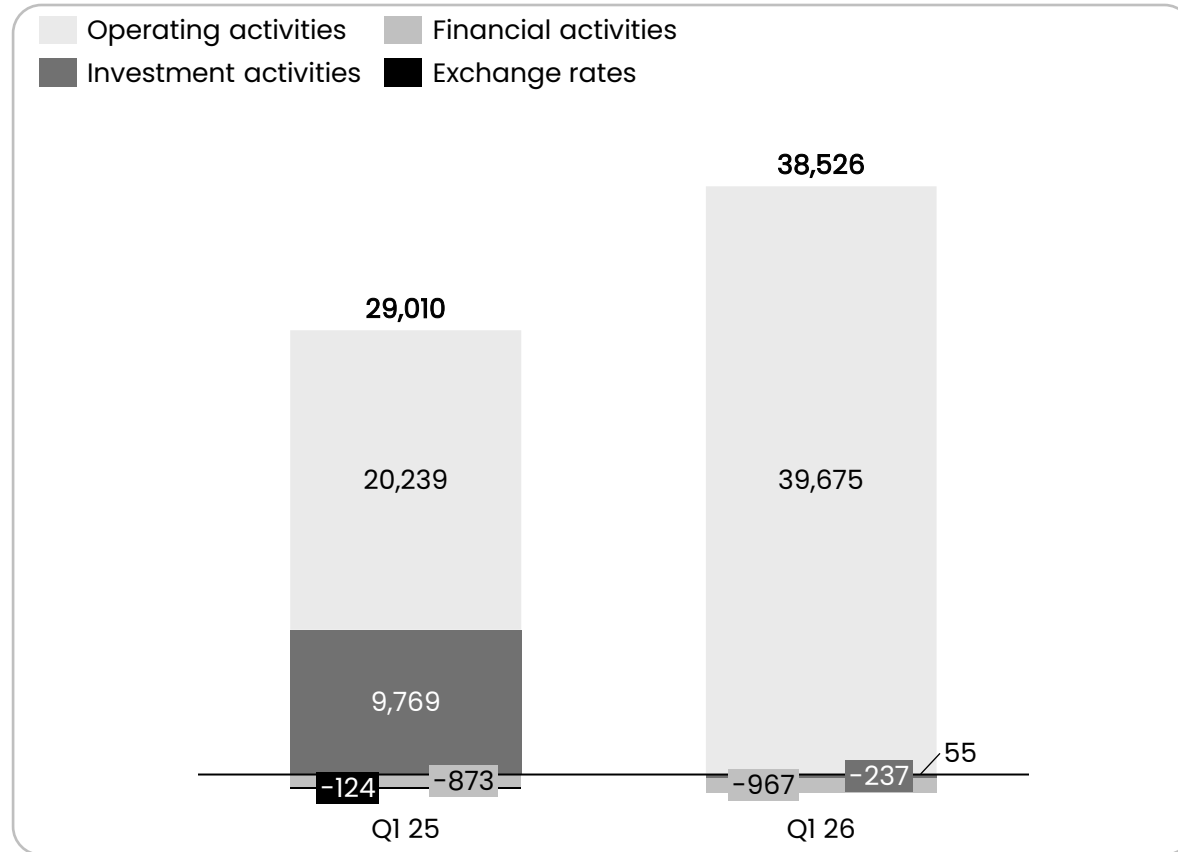


1. ARR backlog Total (12 months) = Total ARR + contractually committed additions, expansions and churn for the next 12 months
 2. Incremental Cloud & Subs. order backlog added (YoY) = Year-on-year change in ARR Cloud & Subscription order backlog (12 months)

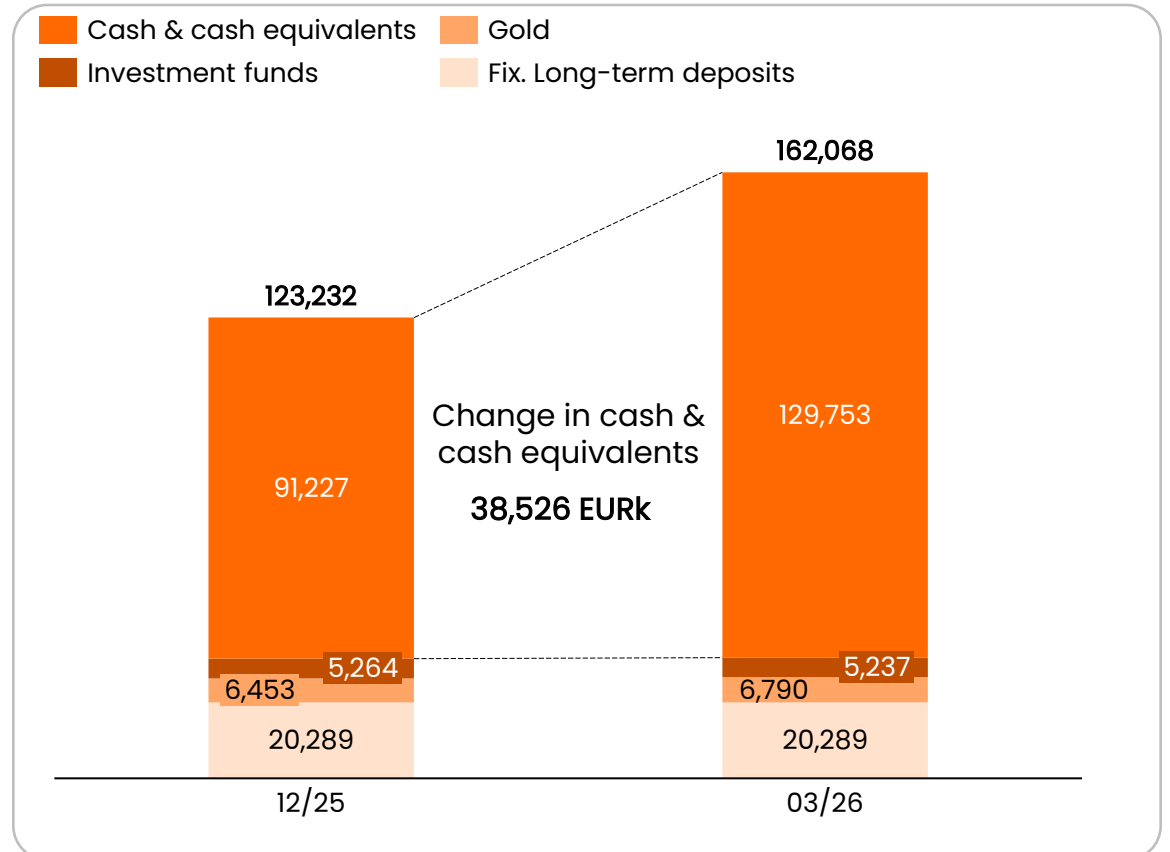
Financial development – impressive cash position

Q1 2026

Cash flow in EURk



Liquidity in EURk



ATOSS – Growth projections

Strong growth and margins while building recurring revenue

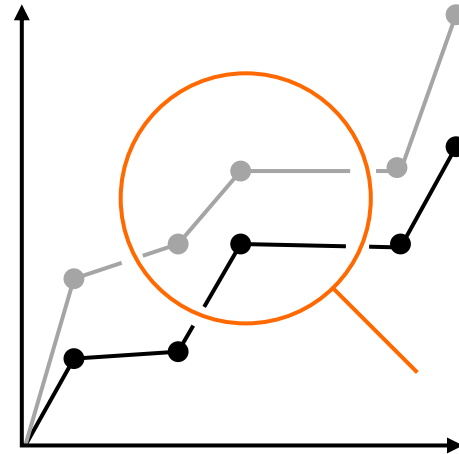
Guidance 2026

Total revenue

~215 EURm

EBIT margin

≥34%



Projections 2026 – 2027

Total revenue growth
(Base: Year end 2025)

CAGR ~14%

Increasing share of
recurring revenue
(Target: Year end 2027)

~75%

Software revenue
growth
(Base: Year end 2025)

CAGR ~16%

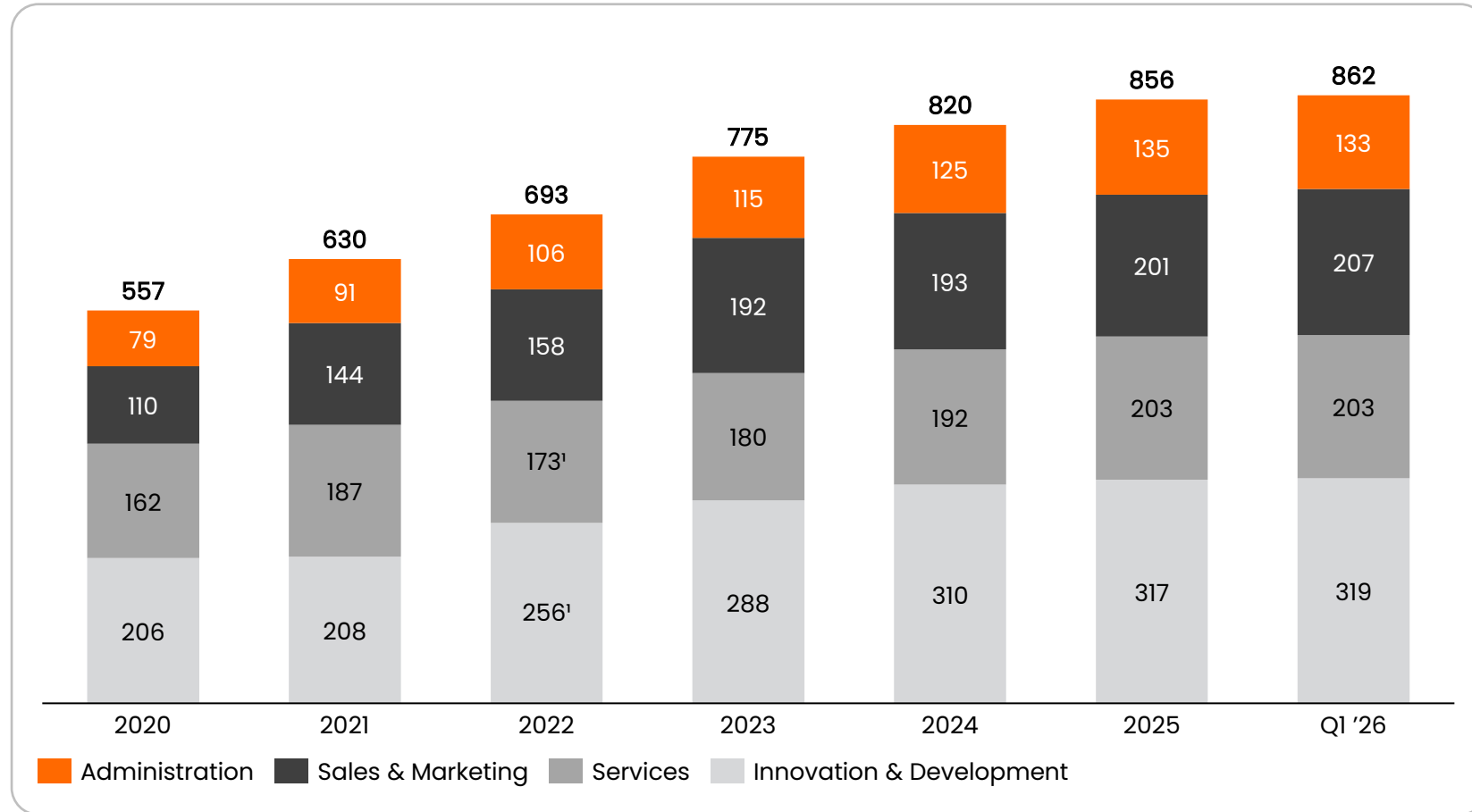
EBIT margin
(Target: Year end 2027)

≥33%

People & Organization update

Q1 2026

Personnel development (headcount)



Key updates:

Transformation of go-to-market organization is completed:

- S&M headcount per Q1 2026 within targeted range

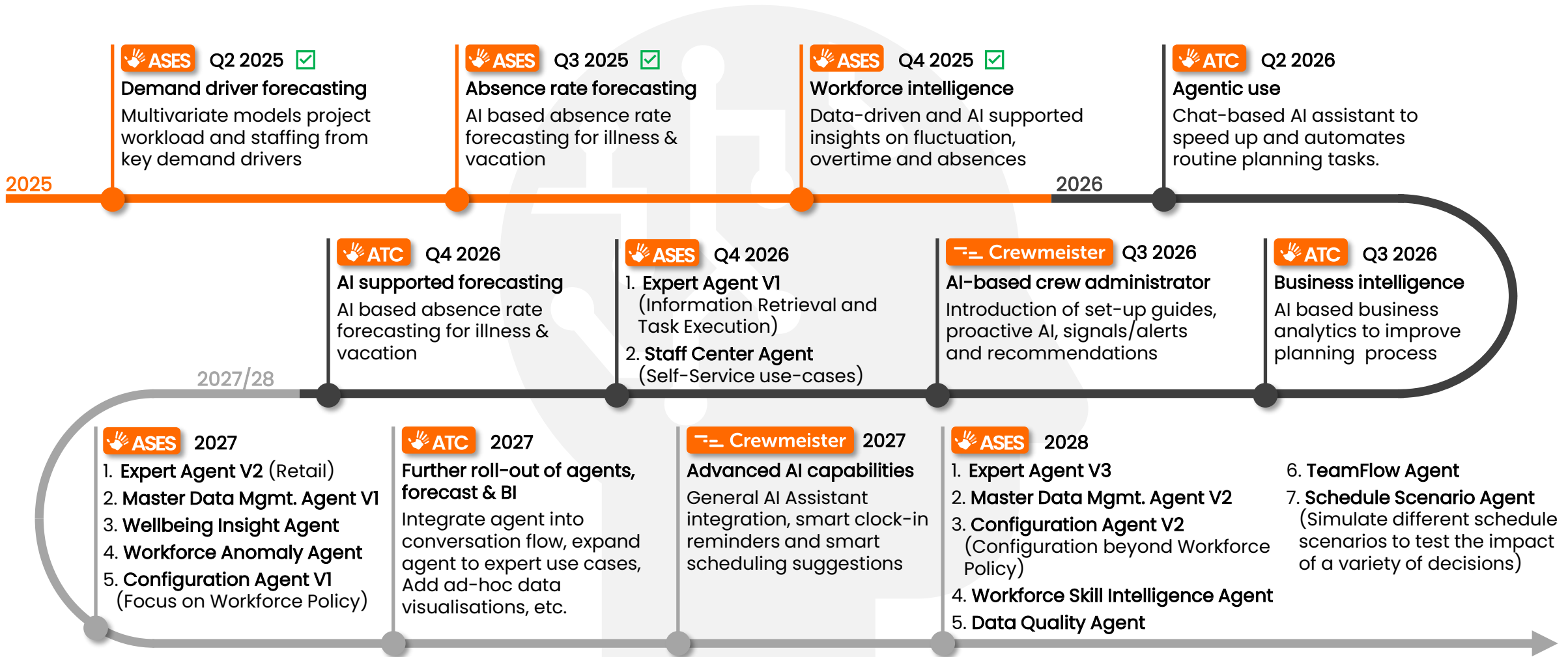
Continued investment in AI:

- Planned build-up of AI Hub in Bangalore

1. In FY 2022 shift of Cloud Services Team from Services Department to Innovation & Development Department

Product update

Current AI services portfolio and roadmap



AI is one of our **core investment areas** in the years ahead, **supporting our 2030 ambition** by unlocking new revenue streams, capturing synergies, expanding our total addressable market, and thus accelerating organic growth.

Q&A session



Appendix

Cash Flow Statement (IFRS)

Operating activities

EURk ¹	Q1 2026	Q1 2025
Earnings before taxes	18,914	16,689
Depreciation	1,200	1,140
Financial income	-883	-1,297
Financial expenses	129	189
Non-cash personnel expenses	553	-
Change in net current assets		
Trade receivables	-7,324	-10,435
Other current non-financial assets	-1,933	-921
Capitalized contract costs	451	170
Other assets	-70	-28
Trade accounts payable	80	-433
Other current financial and non-financial liabilities	-4,109	-6,226
Other current and non-current provisions	-491	1,015
Other non-current financial liabilities	-538	2,289
Contractual liabilities	35,317	30,822
Interest received	329	693
Interest paid	-1	-
Income taxes received	120	-
Income taxes paid	-2,067	-13,427
Cash flow generated from operating activities (1)	39,675	20,239

1. Figures may not sum exactly due to rounding differences.

Cash Flow Statement (IFRS)

Investment and financing activities

EURk ¹	Q1 2026	Q1 2025
Cash flow from investment activities		
Expenditure for the purchase of tangible and intangible assets	-237	-231
Proceeds from the disposal of financial assets	-	10,000
Cash flow generated from investment activities (2)	-237	9,769
Cash flow from financing activities		
Redemption element leasing liabilities IFRS 16	-932	-847
Interest element leasing liabilities IFRS 16	-35	-25
Cash flow generated from financing activities (3)	-967	-873
Changes in cash and cash equivalents - total (1) - (3)	38,471	29,134
Cash and cash equivalents at the beginning of the period	91,227	82,667
Effects of exchange rate changes on cash and cash equivalents	55	-124
Cash and cash equivalents at the end of the period	129,753	111,677

1. Figures may not sum exactly due to rounding differences.

Balance Sheet (IFRS)

Assets

EURK ¹	March 31, 2026	December 31, 2025
Non-current assets		
Intangible assets	100	114
Property, plant and equipment	3,830	3,898
Rights of use	5,978	6,377
Capitalized contract costs	10,998	11,449
Other non-current financial assets and precious metals	2,358	2,231
Total non-current assets	23,264	24,069
Current assets		
Trade receivables	18,284	10,960
Other current financial assets and precious metals	30,529	30,302
Other current non-financial assets	5,554	3,594
Cash and cash equivalents	129,753	91,227
Total current assets	184,120	136,083
Total assets	207,384	160,152

1. Figures may not sum exactly due to rounding differences.

Balance Sheet (IFRS)

Equity and Liabilities

EURK ¹	March 31, 2026	December 31, 2025
Equity		
Subscribed capital	15,906	15,906
Capital reserve	2,601	2,048
Equity deriving from unrealized profits/losses	1,286	1,286
Unappropriated net income	90,708	77,912
Equity attributable to the equity holders of the parent company	110,501	97,153
Non-controlling interests	-109	-109
Total Equity	110,392	97,044
Non-current liabilities		
Pension provisions	1,002	993
Other non-current provisions	669	670
Other non-current financial liabilities	3,825	4,363
Non-current lease liabilities	3,125	3,676
Deferred tax liabilities	3,420	3,907
Total non-current liabilities	12,042	13,608
Current liabilities		
Trade accounts payable	2,665	2,586
Contractual liabilities	38,617	3,300
Current lease liabilities	3,216	3,159
Other current financial liabilities	5,734	6,105
Other current non-financial liabilities	14,084	17,795
Tax liabilities	18,169	13,601
Other provisions	2,464	2,954
Total current liabilities	84,949	49,501
Total equity and liabilities	207,384	160,152