Excellence in Workforce Management

ATOSS Software SE

Earnings Call Q2 and H1 2026 | 24. July 2026 9:30 AM CEST

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ATOSS Software SE 2026

Highlights Q2 and H1 2026

CFO Christof Leiber

Key takeaways

Q2 and H1 2026

1 **Solid H1 2026 with strong margin development:**
- Topline growth of 12% YoY, driven by 26% Cloud growth
- 35% EBIT margin stands above guidance

2 **Positive order development despite ongoing geo-political and macroeconomic headwinds:**
- Strong ARR growth and continued Cloud & Subscription momentum
- New ACV H1 2026 significantly above prior-year level

3 **Advancing AI roadmap on track:**
- Strong order development supports confidence in the long-term relevance of our AI strategy
- Continued execution across AI and Agentic AI initiatives, with further launches planned in 2026

4 **Outlook 2026 & 2027:**
- Continued double-digit revenue growth
- 2026: Revenue projection at €210m–€215m and EBIT margin of at least 34%
- 2027: Revenue projection of €235m-€245m and EBIT margin of at least 35%

Income statement (IFRS)

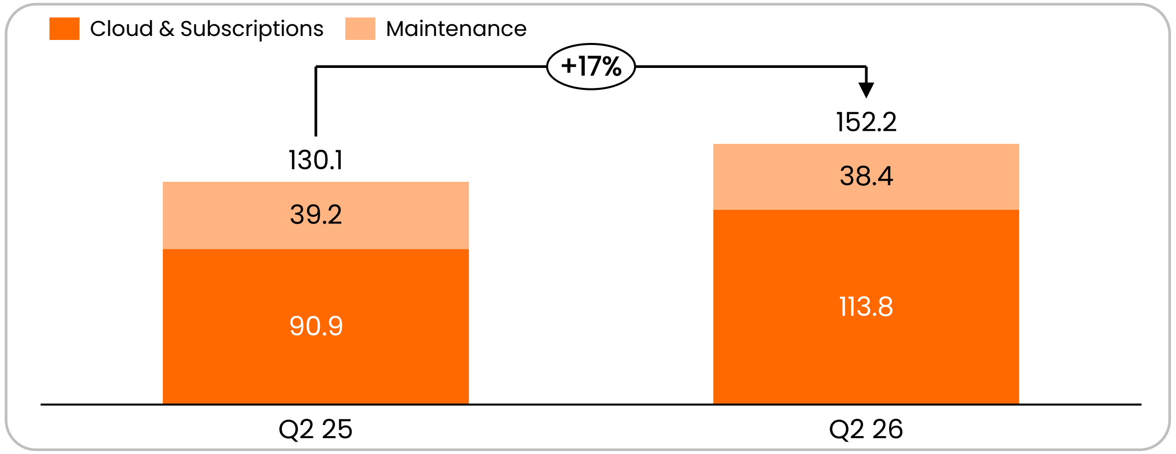
H1 2026 vs. H1 2025

EURk[1]	H1 2026	% of total revenue	H1 2025	% of total revenue	YoY %
Total revenue	**103,233**	**100%**	**92,087**	**100%**	**12%**
Software	**77,692**	**75%**	**68,240**	**74%**	**14%**
Licenses	2,852	3%	4,273	5%	-33%
Maintenance	19,154	19%	19,850	22%	-4%
Cloud & Subscriptions	55,686	54%	44,117	48%	26%
Consulting	20,971	20%	19,449	21%	8%
Hardware	2,147	2%	1,978	2%	9%
Others	2,423	2%	2,420	3%	0%
EBITDA	38,643	37%	33,293	36%	16%
EBIT	**36,221**	**35%**	**30,985**	**34%**	**17%**
EBT	36,587	35%	32,244	35%	13%
Net profit	24,559	24%	21,720	24%	13%
EPS in euro	1.54		1.37		13%

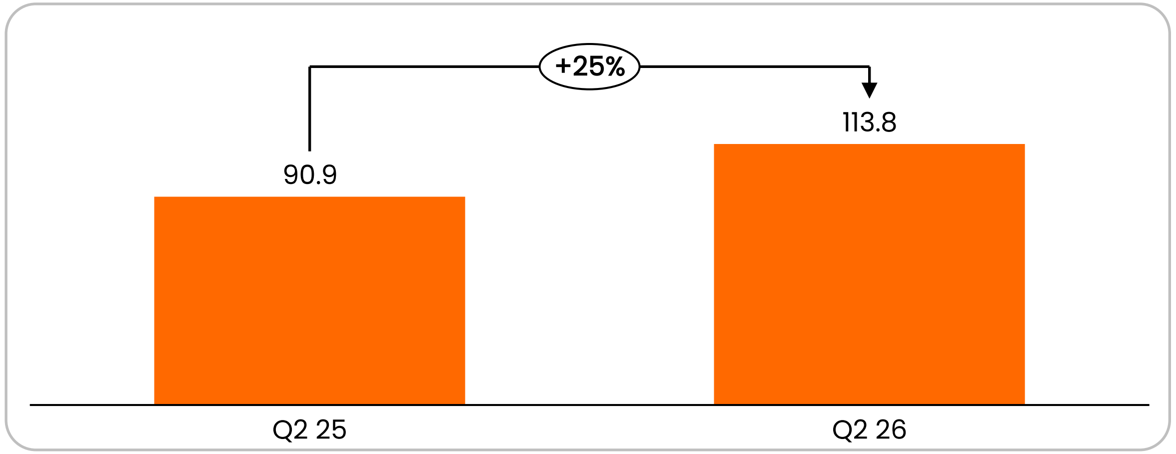
1. Figures may not sum exactly due to rounding differences.

Strong development of recurring revenue driven by Cloud & Subscriptions

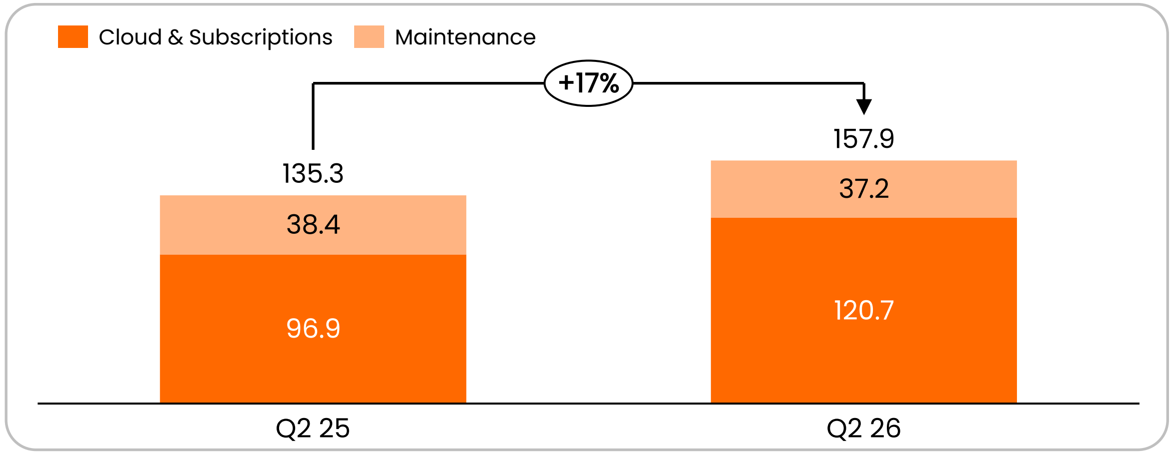
ARR Total (Cloud & Subscriptions + Maintenance) in EURm



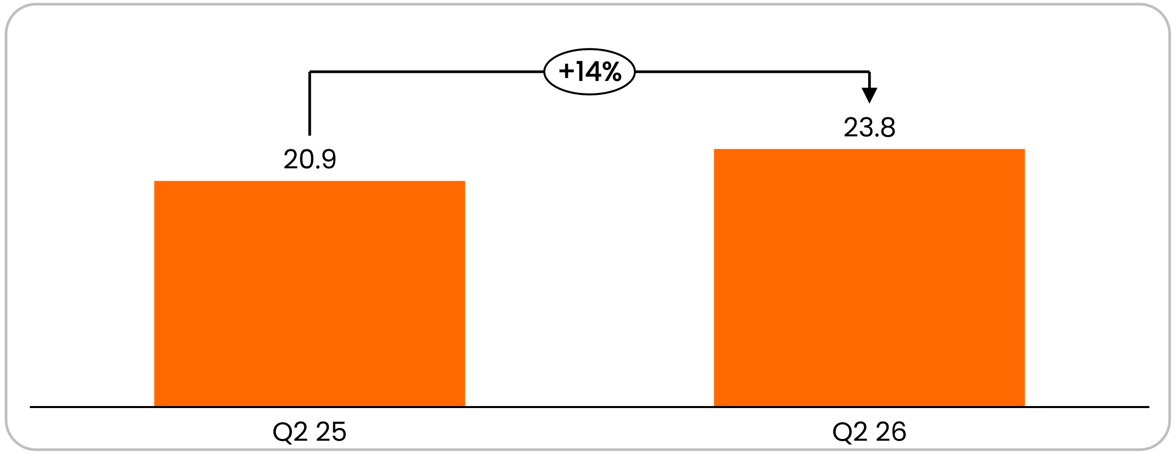
ARR Cloud & Subscriptions in EURm



ARR backlog Total (12 months)[1] in EURm



Cloud & Subscription backlog growth (YoY)[2] in EURm

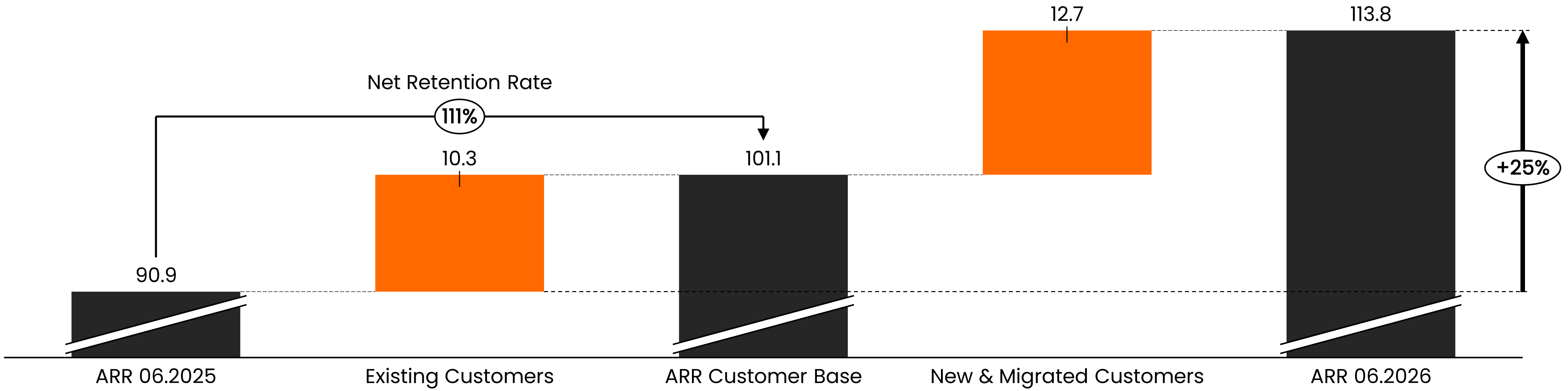


1. ARR backlog Total (12 months) = Total ARR + contractually committed additions, expansions and churn for the next 12 months
2. Incremental Cloud & Subs. order backlog added (YoY) = Year-on-year change in ARR Cloud & Subscription order backlog (12 months)

ATOSS Cloud & Subscriptions development by products

H1 2026

Cloud & Subscriptions ARR[1] in EURm



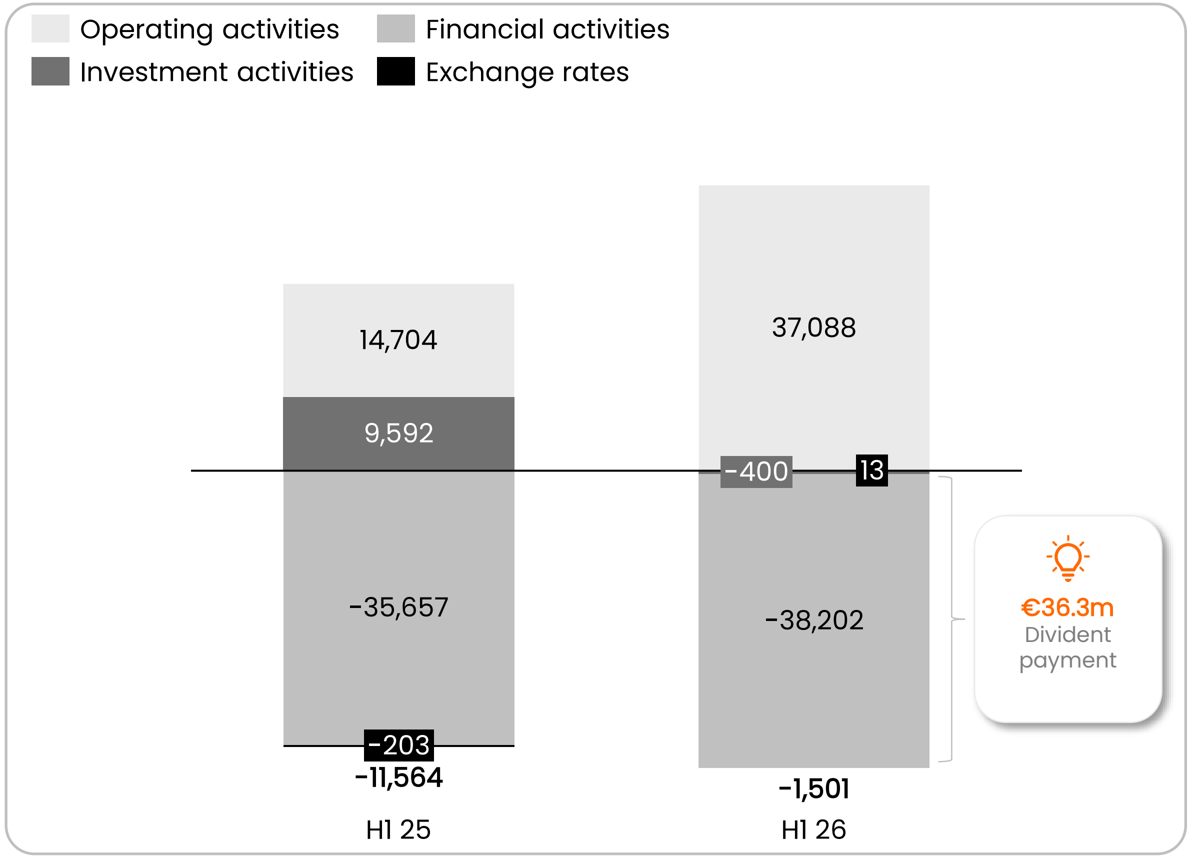
		GRR[2]	NRR[3]				
ASES	66.6	94.7%	9.7	114.6%	76.3	7.6	83.9
ATC	16.3	94.9%	1.1	106.5%	17.4	2.3	19.7
Crewmeister	7.9	77.6%	*-0.5*	93.4%	7.4	2.8	10.2

1. ARR (Annual Recurring Revenue) comprises the turnover generated by the company over the next 12 months on the basis of current monthly cloud usage fees applicable as of the qualifying date
2. Gross Retention Rate: Percentage of existing customers or revenue retained over the last 12months, excluding expansion and new customers
3. Net Retention Rate: Revenues generated from existing customers as of PY- taking into account expansion and churn (based on PY ARR)

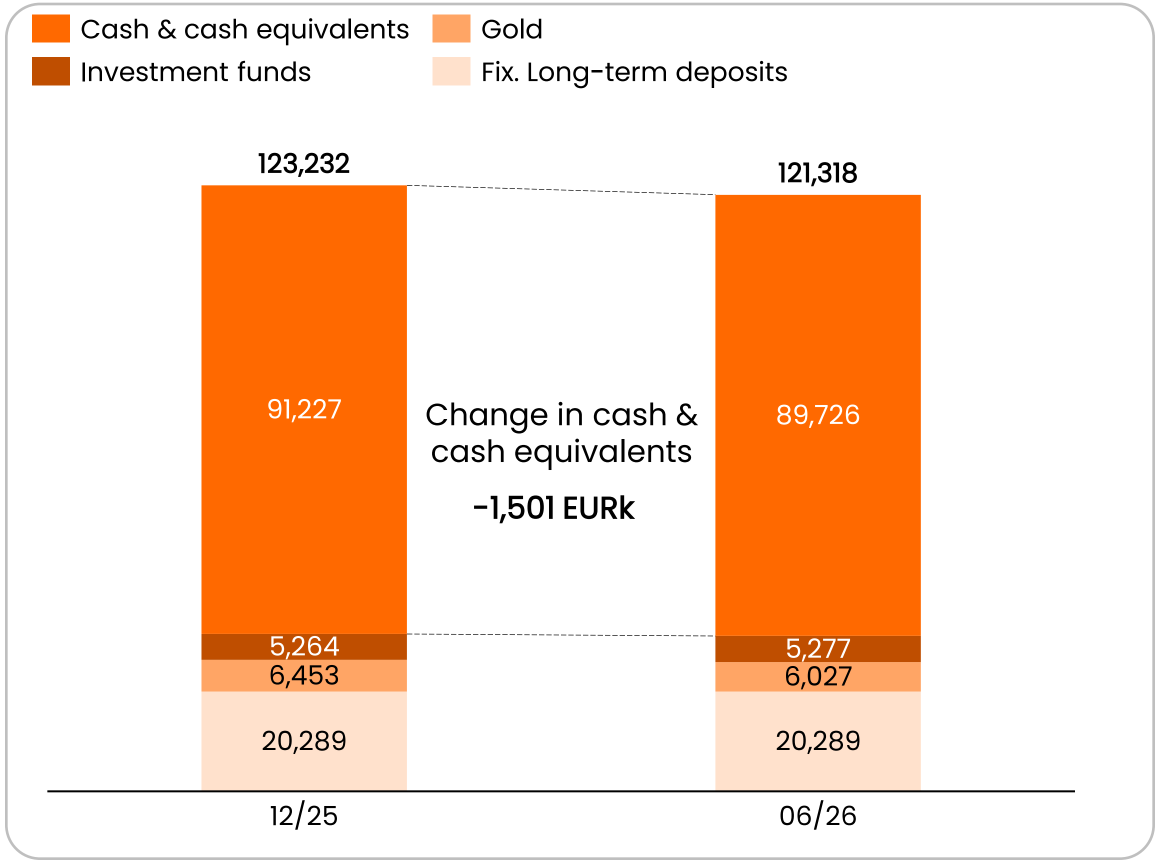
Financial development – impressive cash position

H1 2026

Cash flow in EURk



Liquidity in EURk



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Product update

Current AI services portfolio and roadmap

2025

ASES Q2 2025 ✓
Demand driver forecasting
Multivariate models project workload and staffing from key demand drivers

ASES Q3 2025 ✓
Absence rate forecasting
AI based absence rate forecasting for illness & vacation

ASES Q4 2025 ✓
Workforce intelligence
Data-driven and AI supported insights on fluctuation, overtime and absences

2026

ATC Q2 2026 ✓
Agentic use
Chat-based AI assistant to speed up and automates routine planning tasks.

ATC Q3 2026
Business intelligence
AI based business analytics to improve planning process

Crewmeister Q3 2026
AI-based crew administrator
Introduction of set-up guides, proactive AI, signals/alerts and recommendations

ASES Q4 2026
1. **Expert Agent V1**
   (Information Retrieval and Task Execution)
2. **Staff Center Agent**
   (Self-Service use-cases)

ATC Q4 2026
AI supported forecasting
AI based absence rate forecasting for illness & vacation

2027/28

ASES 2027
1. **Expert Agent V2** (Retail)
2. **Master Data Mgmt. Agent V1**
3. **Wellbeing Insight Agent**
4. **Workforce Anomaly Agent**
5. **Configuration Agent V1**
   (Focus on Workforce Policy)

ATC 2027
Further roll-out of agents, forecast & BI
Integrate agent into conversation flow, expand agent to expert use cases, Add ad-hoc data visualisations, etc.

Crewmeister 2027
Advanced AI capabilities
General AI Assistant integration, smart clock-in reminders and smart scheduling suggestions

ASES 2028
1. **Expert Agent V3**
2. **Master Data Mgmt. Agent V2**
3. **Configuration Agent V2**
   (Configuration beyond Workforce Policy)
4. **Workforce Skill Intelligence Agent**
5. **Data Quality Agent**
6. **TeamFlow Agent**
7. **Schedule Scenario Agent**
   (Simulate different schedule scenarios to test the impact of a variety of decisions)

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.

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AI as a strategic enabler across ATOSS

Scaling internal AI adoption across four value creation areas

Build
Software Development

Attract
Marketing

Convert
Sales

Serve
Customer Service & Support

Focus on **end-to-end value chains** rather than isolated use cases

↓

Enhanced **efficiency**, **productivity** & **velocity**

↓

Customer centricity | Growth opportunities | Higher margins

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Q&A session

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Appendix

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Cash Flow Statement (IFRS)

Operating activities

EURk[1]	H1 2026	H1 2025
Earnings before taxes	**36,587**	**32,244**
Depreciation	2,423	2,307
Financial income	-982	-1,674
Financial expenses	615	416
Non-cash personnel expenses	2,606	0
Payouts from share-based remuneration	-750	0
Change in net current assets		
Trade receivables	-536	-1,604
Other current non-financial assets	-1,606	-328
Capitalized contract costs	-611	-1,538
Other assets	-125	-67
Trade accounts payable	-781	-273
Other current financial and non-financial liabilities[2]	-2,609	-1,512
Other current and non-current provisions	-318	1,223
Other non-current financial liabilities[2]	-505	957
Contractual liabilities	7,432	6,801
Interest received	723	1,084
Interest paid	-1	0
Income taxes received	120	0
Income taxes paid	-4,595	-23,331
Cash flow generated from operating activities (1)	**37,088**	**14,704**

1. Figures may not sum exactly due to rounding differences; 2. Adjustment/Reclassification of previous year's figures with respect to maturities

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Cash Flow Statement (IFRS)

Investment and financing activities

EURk[1]	H1 2026	H1 2025
Cash flow from investment activities		
Expenditure for the purchase of tangible and intangible assets	-400	-408
Proceeds from the disposal of financial assets	-	10,000
Cash flow generated from investment activities (2)	**-400**	**9,592**
Cash flow from financing activities		
Redemption element leasing liabilities IFRS 16	-1,868	-1,715
Interest element leasing liabilities IFRS 16	-68	-63
Dividends paid	-36,266	-33,880
Cash flow generated from financing activities (3)	**-38,202**	**-35,657**
Changes in cash and cash equivalents - total (1) - (3)	**-1,514**	**-11,361**
Cash and cash equivalents at the beginning of the period	**91,227**	**82,667**
Effects of exchange rate changes on cash and cash equivalents	13	-203
Cash and cash equivalents at the end of the period	**89,726**	**71,103**

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Balance Sheet (IFRS)

Assets

EURk[1]	June 30, 2026	December 31, 2025
Non-current assets		
Intangible assets	84	114
Property, plant and equipment	3,696	3,898
Rights of use	5,174	6,377
Capitalized contract costs	12,060	11,449
Other non-current financial assets and precious metals	2,161	2,231
Total non-current assets	**23,175**	**24,069**
Current assets		
Trade receivables	11,496	10,960
Other current financial assets and precious metals	30,003	30,302
Other current non-financial assets	5,254	3,594
Cash and cash equivalents	89,726	91,227
Total current assets	**136,478**	**136,083**
Total assets	**159,653**	**160,152**

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Balance Sheet (IFRS)

Equity and Liabilities

EURk[1]	June 30, 2026	December 31, 2025
Equity		
Subscribed capital	15,906	15,906
Capital reserve	3,904	2,048
Equity deriving from unrealized profits/losses	1,286	1,286
Unappropriated net income	66,205	77,912
Equity attributable to the equity holders of the parent company	**87,301**	**97,153**
Non-controlling interests	-109	-109
Total Equity	**87,192**	**97,044**
Non-current liabilities		
Pension provisions	1,012	993
Other non-current provisions	1,155	670
Other non-current financial liabilities	3,858	4,363
Non-current lease liabilities	2,501	3,676
Deferred tax liabilities	3,571	3,907
Total non-current liabilities	**12,097**	**13,608**
Current liabilities		
Trade accounts payable	1,804	2,586
Contractual liabilities	10,732	3,300
Current lease liabilities	3,046	3,159
Other current financial liabilities	6,555	6,105
Other current non-financial liabilities	14,728	17,795
Tax liabilities	21,348	13,601
Other provisions	2,151	2,954
Total current liabilities	**60,365**	**49,501**
Total equity and liabilities	**159,653**	**160,152**

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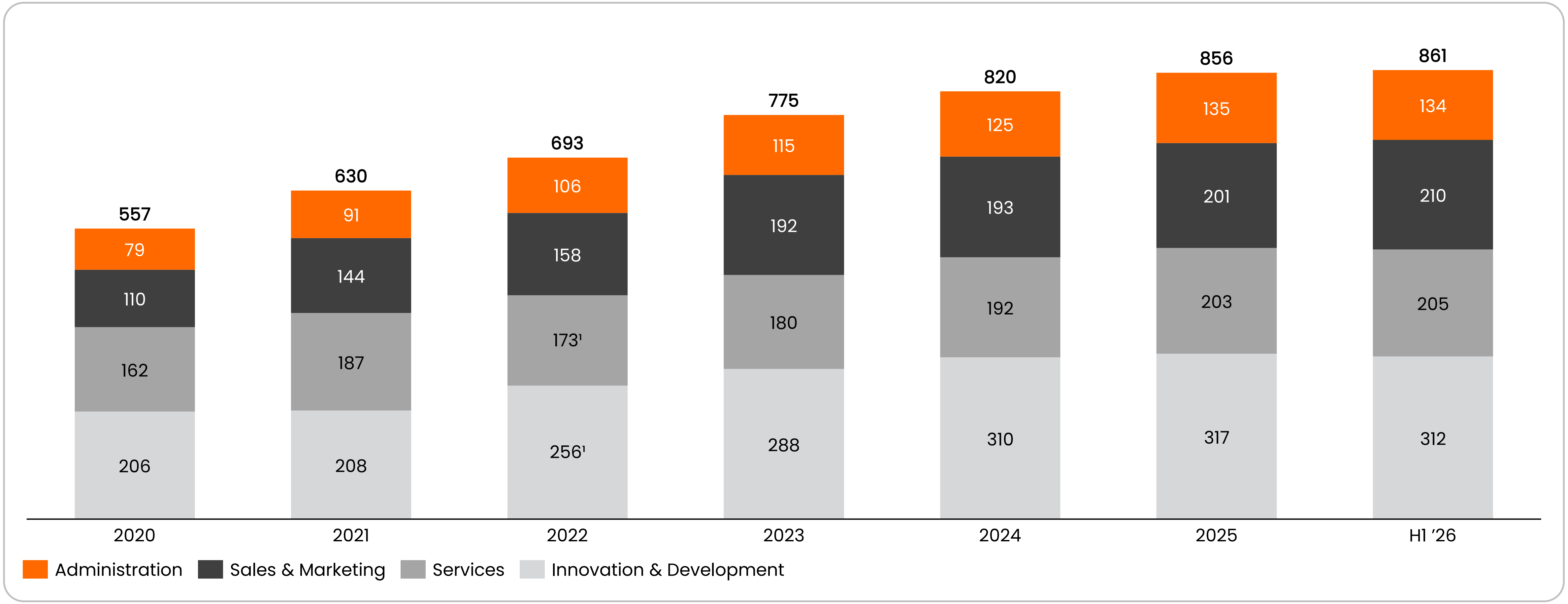
People & Organization update

H1 2026

Personnel development (headcount)



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