9M 2026 Results Presentation

12 November 2026

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Agenda

1. Highlights
2. Business Review
3. Financial Review
4. DOMS Industries

Appendices:

1. 9M and Q3 EBITDA ex IFRS-16
2. Exchange rates



9M 2026 Results Highlights

- **FILA 9M 2026 results confirmed sustained revenue growth and improved profitability**, supported also by the consolidation of Seven Group, maintaining financial strength even after the dividend distribution

- **Core Business Sales** 9M 2026 amounted to €512.0m, +12.6% vs 9M 2025 on a comparable FX, including Seven Group contribution. Q3 2026 Core Business Sales at €168.6m, +13.3% vs Q3 2025 on a comparable FX, despite a weak economic environment and temporary production inefficiencies in Mexico (improving vs Q2), and the UK facility fire accident

- **Adjusted EBITDA** 9M 2026 totalled €106.4m, +15.2% vs 9M 2025 on a comparable FX, including positive Seven Group contribution, with margin at 20.8% vs 20.4% in 9M 2025. Q3 2026 Adjusted EBITDA at €30.6m (+3.4% on a comparable FX). A production footprint optimization is going to start in Mexico in early 2027, while UK production is already restarted in November

- **Reported Group Net Profit** at €64.1m vs €20.6m in 9M 2025, chiefly thanks to capital gain related to DOMS ABB. **Adjusted Group Net Profit** 9M 2026 reached €48.1m, improving from €36.5m in 9M 2025, driven by better operating performance and lower net financial expenses, mainly thanks to positive forex impacts (€12.4m between 9M 2026 and 9M 2025)

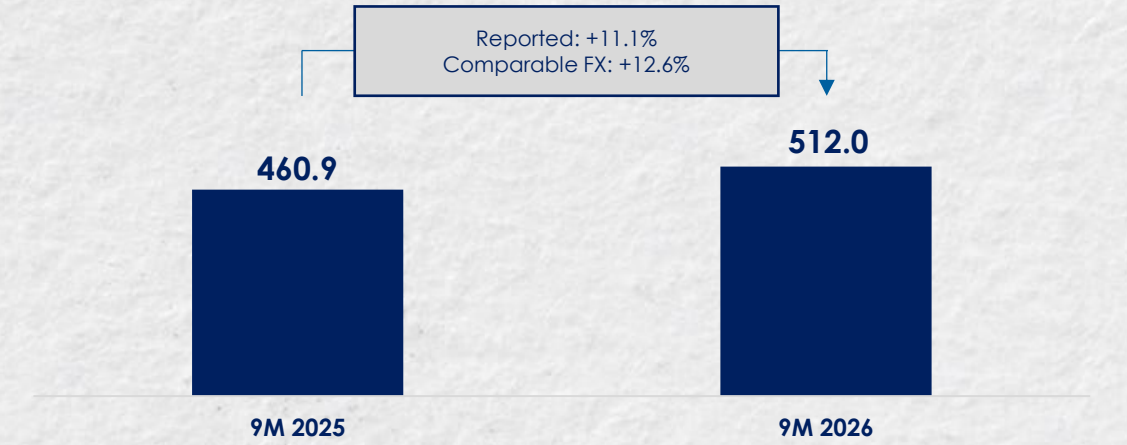
- **FCFE** 9M 2026 amounted to -€34.8m, stable vs -€32.3 in 9M 2025, despite Seven Group cash absorption

- **Net Bank Debt** 9M 2026 at -€198.6m, with €4.4m decrease vs 9M 2025 thanks to cash flow generation and the disposal of the stake in DOMS for €73.8m, the acquisition of Seven Group (-€54.9m of total consideration and Net Bank Debt of -€19.2m), dividends (-€37.1m in 9M 2026, including -€23.5m distributed in October) and buyback (-€4.2m in 9M 2026)

- **Outlook 2026:** 2026 guidance remains unchanged, pointing to double-digit growth both in Revenues and Adjusted EBITDA. Free Cash Flow to Equity is expected between €40-50m, in the ordinary course

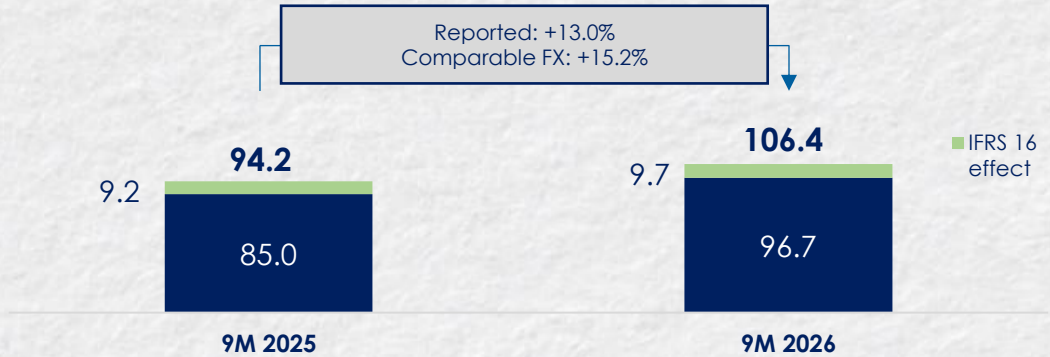
Snapshot – 9M 2026

Core Business Sales (€m)



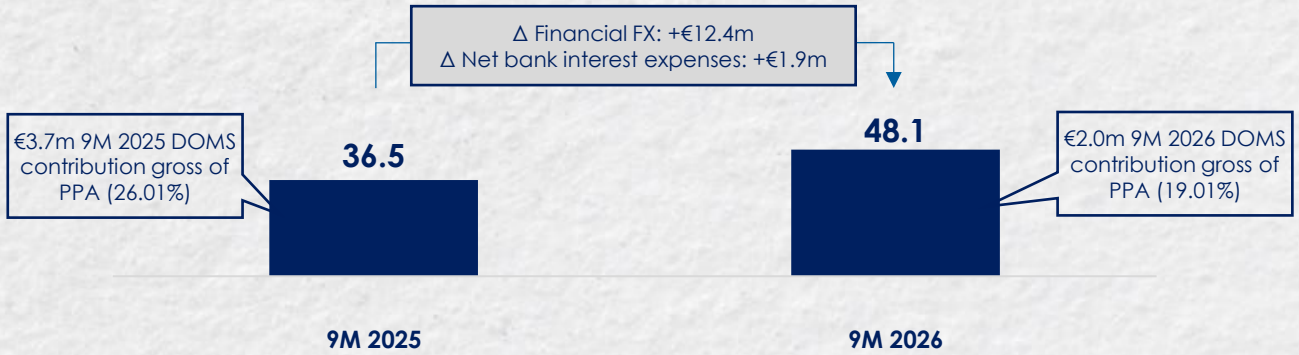
Adjusted EBITDA (€m)

20.4%	EBITDA Margin: +40pp	20.8%



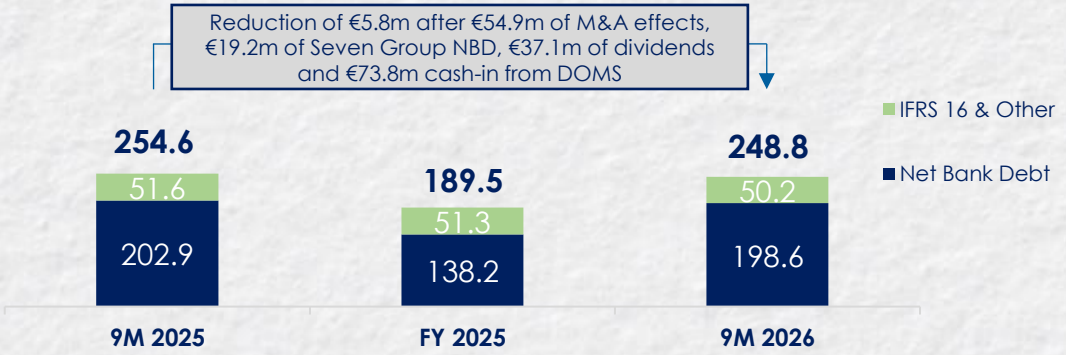
Adjusted Group Net Profit (€m)

43.1	Adj. Net Profit + PPA	54.9



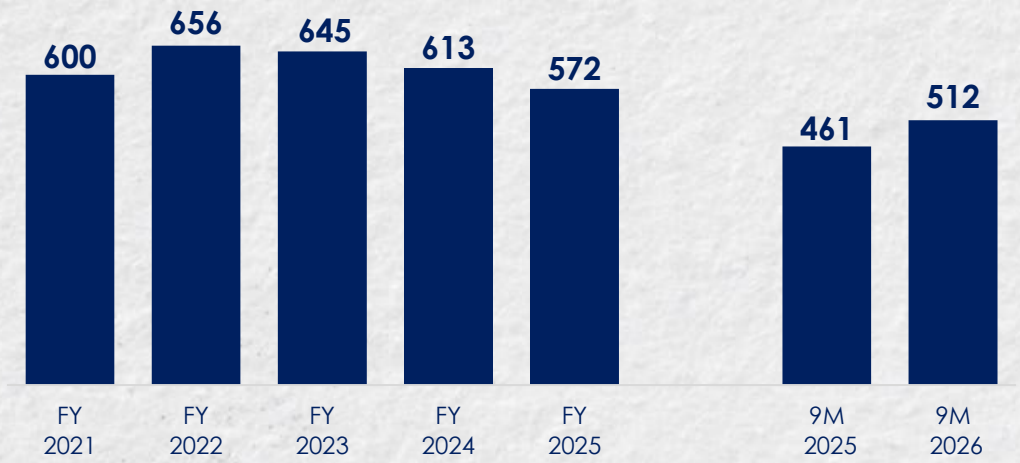
Net Financial Position/Net Bank Debt (€m)

1.9x	Leverage ratio on NBD	1.7x

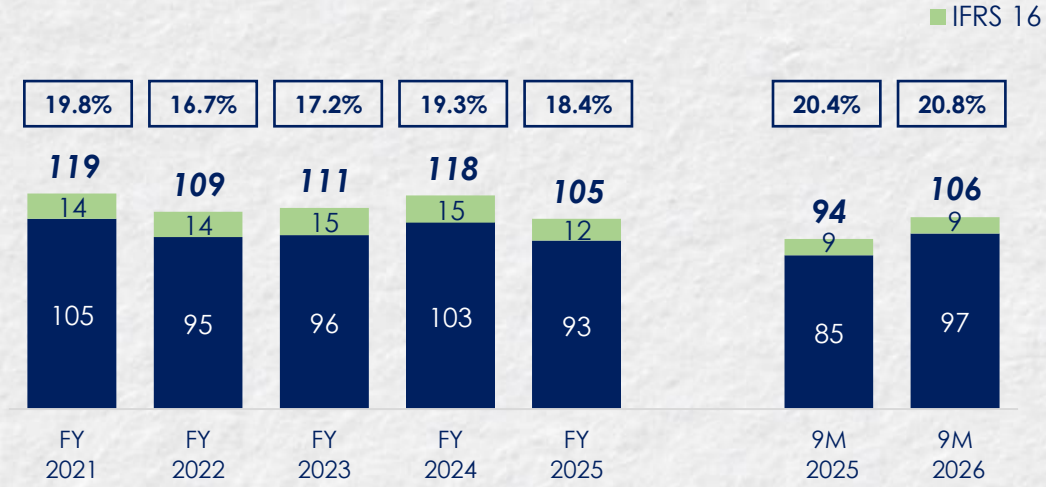


Consistent Cash Flow Generation and EBITDA margin performance over the years

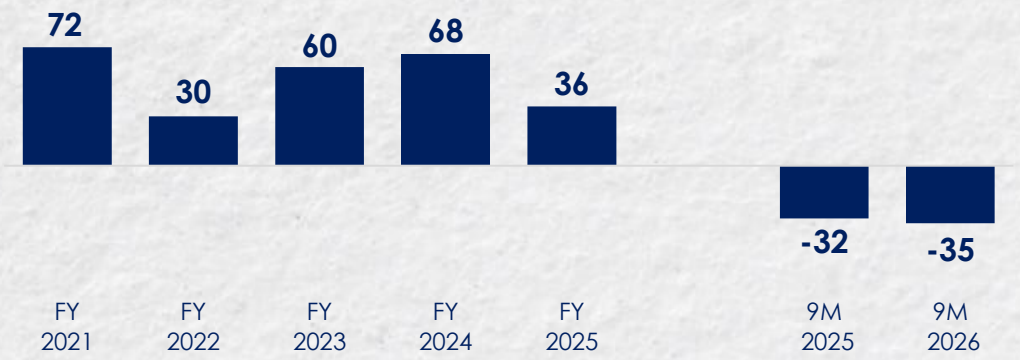
Core Business Sales (€m)



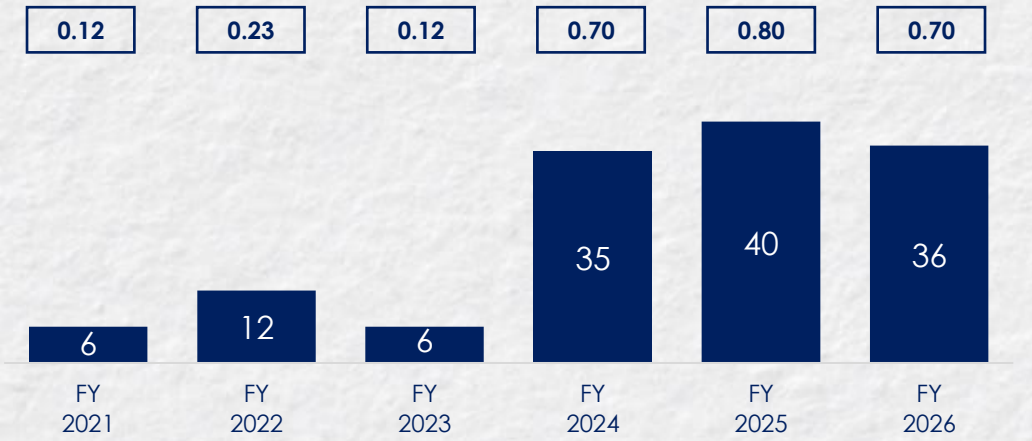
Adjusted EBITDA (€m) & EBITDA Margin (%)



Free Cash Flow to Equity (€m)



Dividends (€m) & DPS (€)



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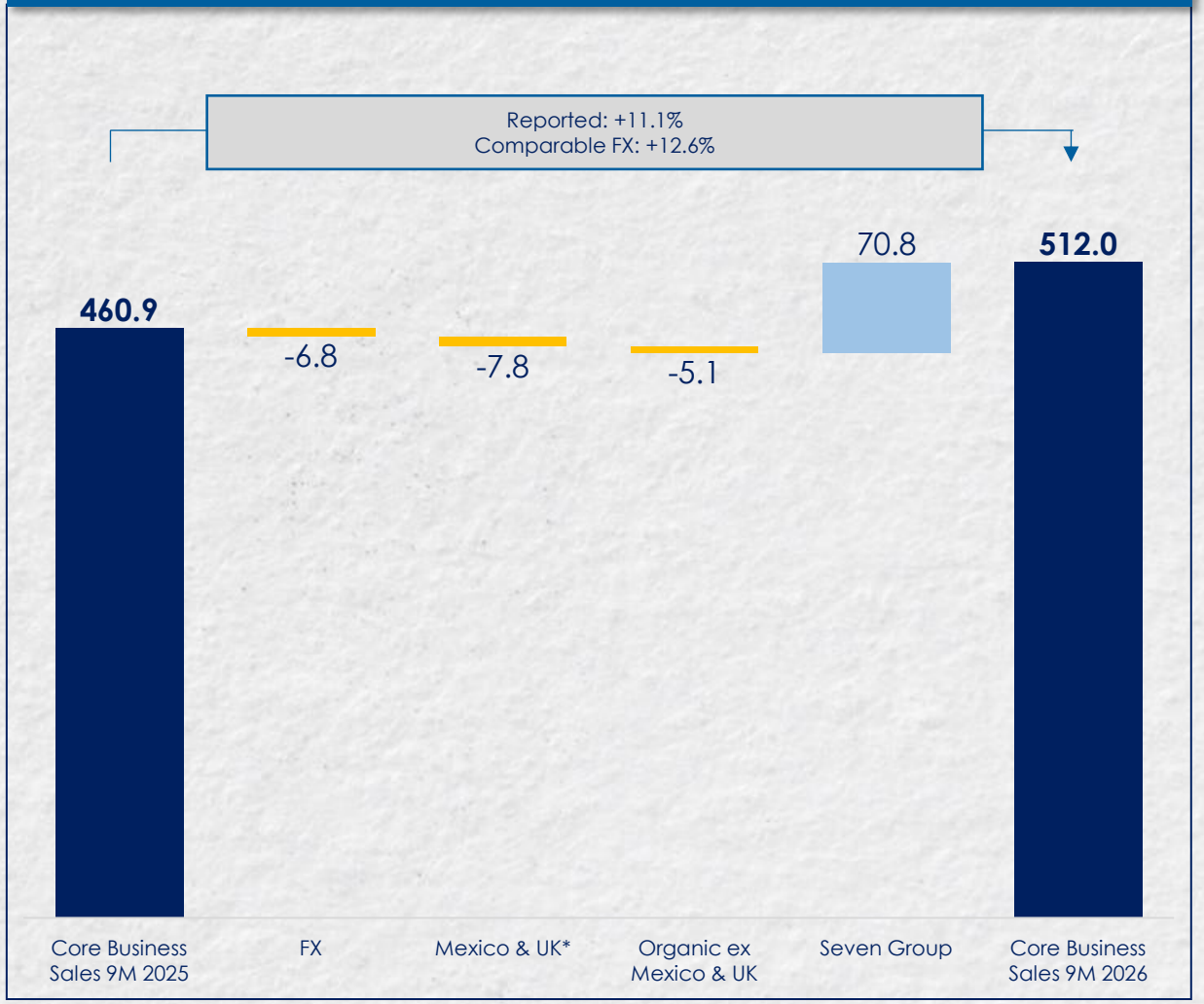
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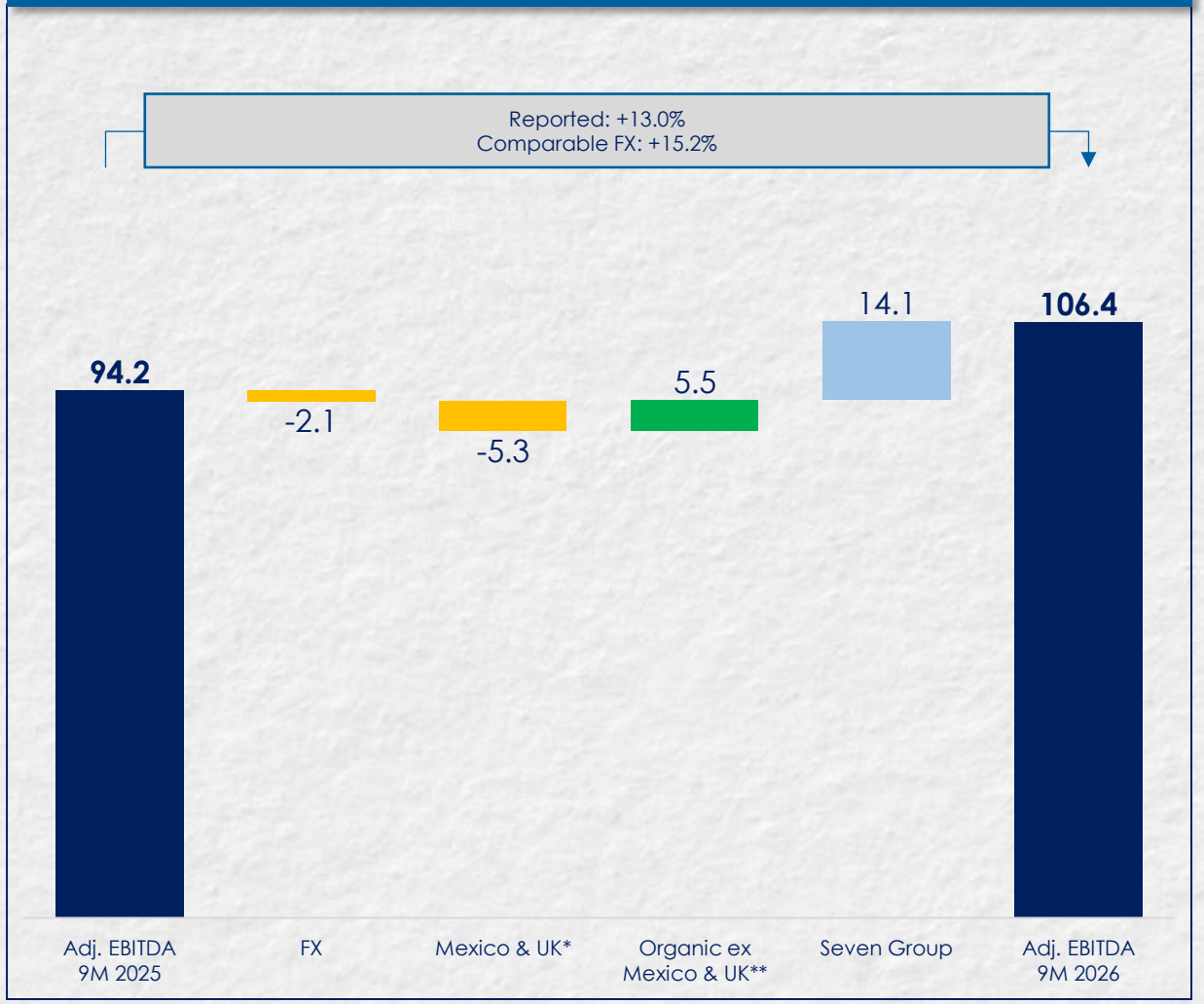


Core Business Sales and Adjusted EBITDA Evolution

Core Business Sales Evolution (€m)



Adjusted EBITDA Evolution (€m)



**A production footprint optimization is going to start in Mexico in early 2027, while UK production is already restarted in November*

***Including positive net tariff impact of €2.7m*

Core Business Sales – 9M & Q3 2026 Results

	9M 2025	9M 2026	Delta (€)	Comparable FX	Q3 2025	Q3 2026	Delta (€)	Comparable FX
Total Fila Group	**460.9**	**512.0**	**+51.1m +11.1%**	**+57.9m +12.6%**	**146.4**	**168.6**	**+22.2m +15.2%**	**+19.5m +13.3%**
North America	227.2 *(49%)*	218.9 *(43%)*	-8.3m -3.6%	+0.1m +0.0%	72.2 *(49%)*	72.6 *(43%)*	+0.4m +0.5%	-0.9m -1.2%
Europe	167.9 *(36%)*	230.6 *(45%)*	+62.7m +37.4%	+63.9m +38.0%	54.6 *(37%)*	76.8 *(46%)*	+22.2m +40.6%	+22.1m +40.5%
C&SA	54.9 *(12%)*	51.1 *(10%)*	-3.8m -7.0%	-6.3m -11.5%	15.8 *(11%)*	15.3 *(9%)*	-0.5m -3.1%	-1.6m -10.4%
Asia	8.3 *(2%)*	8.4 *(2%)*	+0.2m +2.2%	+0.1m +1.3%	2.8 *(2%)*	2.8 *(2%)*	-0.1m -3.1%	-0.2m -7.9%
RoW	2.6 *(1%)*	3.0 *(1%)*	+0.3m +12.8%	+0.2m +6.5%	0.9 *(1%)*	1.2 *(1%)*	+0.2m +25.0%	+0.1m -14.7%

Key Highlights

Core Business Sales 9M 2026 results at €512.0m (+12.6% at comparable FX), including €70.8m of Seven Group contribution. **Core Business Sales Q3 2026 at €168.6m** (+13.3% at comparable FX), including €26.5m of Seven Group

North America 9M 2026 results at €218.9m, flat on a comparable FX basis. **North America Q3 2026 results at €72.6m,** -1.2% on a comparable FX basis, reflecting softer performance towards the end of Q3 (recovery expected in Q4)

Europe 9M 2026 results at €230.6m +38.0% on a comparable FX basis. **Europe results Q3 2026 at €76.8m,** +40.5% on a comparable FX basis, impacted by the fire accident in UK Daler Rowney plant (c. -€2m) and temporary delays in production and shipment (recovery expected in Q4)

C&SA 9M 2026 results at €51.1m, -11.5% on a comparable FX basis, still suffering from the weak economic environment in Mexico. **C&SA results Q3 2026 at €15.3m, -10.4**% on a comparable FX basis, improving vs Q2

Adjusted EBITDA – 9M & Q3 2026 Results

	9M 2025	9M 2026	Delta (€)	2025 Margin	2026 Margin	Q3 2025	Q3 2026	Delta (€)	2025 Margin	2026 Margin
Total Fila Group	**94.2**	**106.4**	**+12.2m +13.0%**	**20.4%**	**20.8%**	**28.9**	**30.6**	**+1.7m +5.9%**	**19.7%**	**18.1%**
North America	50.6	59.0	+8.4m +16.7%	22.3%	27.0%	16.2	16.0	-0.2m -1.5%	22.4%	22.0%
Europe	29.4	40.8	+11.4m +38.9%	17.5%	17.7%	9.0	13.1	+4.1m +45.2%	16.5%	17.0%
C&SA	10.1	4.6	-5.5m -54.0%	18.4%	9.1%	2.0	0.9	-1.1m -55.0%	12.7%	5.9%
Asia	3.8	1.6	-2.1m -56.3%	45.5%	19.4%	1.5	0.5	-1.0m -68.3%	52.4%	17.2%
RoW	0.4	0.3	-0.1m -25.8%	13.8%	9.0%	0.1	0.1	+0.0m +2.0%	15.4%	12.6%

**Net Tariffs impact is the result of the difference between the reimbursement of additional US tariffs for +€8.2m and related effects on inventories sold for -€5.5m. Net cash-in reimbursement €8.6m ($9.8m) including interests for €0.3m*

Key Highlights

Adjusted EBITDA stood at €106.4m in 9M 2026 (+13.0% vs 9M 2025, +15.2% comparable FX), including +€14.1m of Seven Group. **Adjusted EBITDA Q3 2026 at €30.6m** (+5.9% vs Q3 2025, +3.4% comparable FX), including +€5.5m of Seven Group

Adjusted EBITDA margin increased vs 9M 2025 (20.8% vs 20.4%), despite increasing inflationary impact and margin pressure in CSA related to temporary production inefficiencies

North America Adj. EBITDA at €59.0m (+16.7% vs 9M 2025) with **EBITDA margin at 27.0%,** strongly improved vs **22.3% in 9M 2025** thanks to price increase, continuous efficiencies and net tariffs impact* (+€2.7m). **North America Adj. EBITDA Q3 2026 at €16.0m** (-1.5% vs Q3 2025)

Europe Adj. EBITDA in 9M 2026 at €40.8m (+38.9% vs 9M 2025). **Europe Adj. EBITDA Q3 2026 at €13.1m** (+45.2% vs Q3 2025)

C&SA Adj. EBITDA at €4.6m in 9M 2026 (-54.0% vs 9M 2025) due to lower revenues and temporary Inefficiencies related to Chinese production's relocation in Mexico

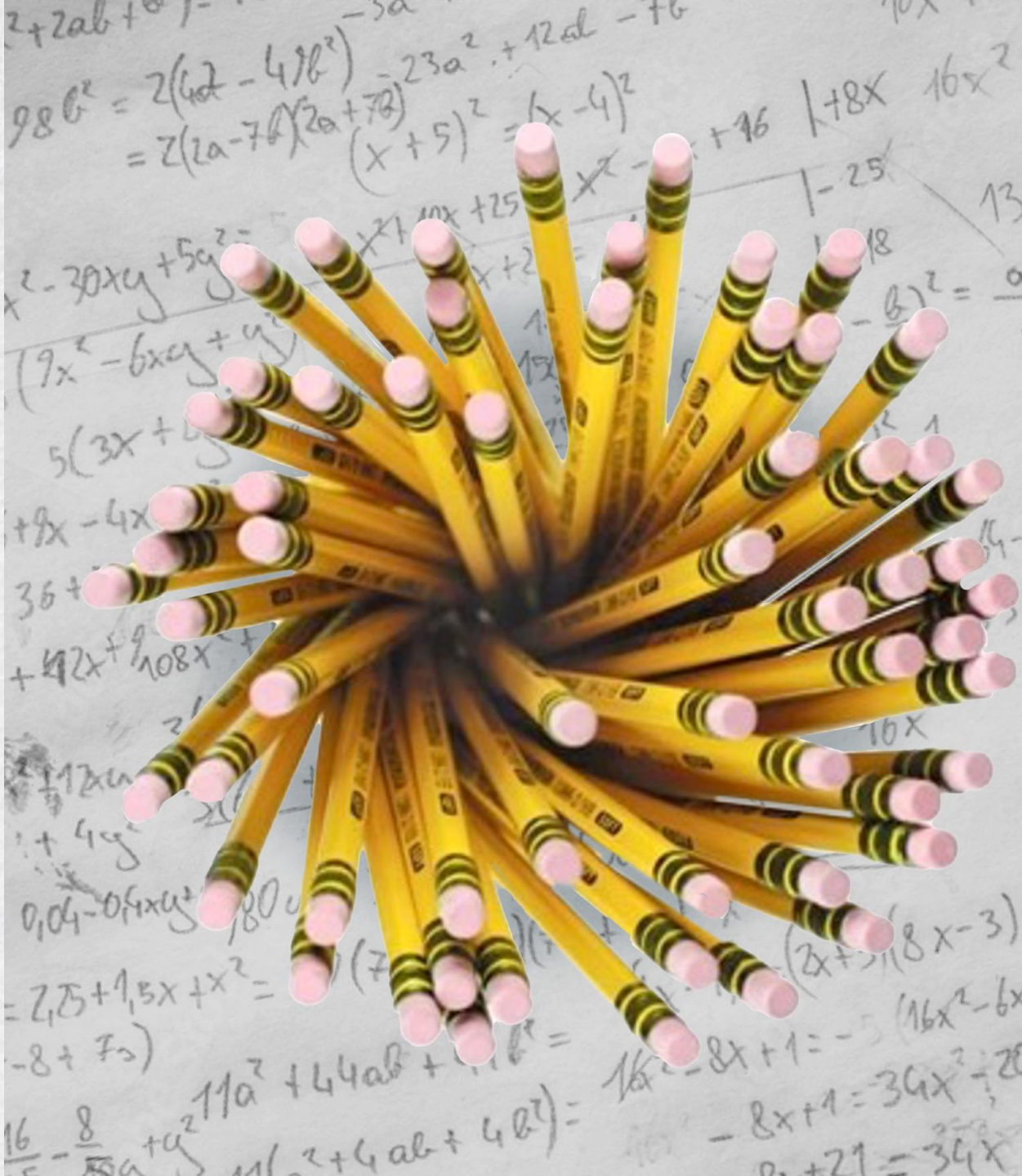
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Adjusted Income Statement

(€ million)	9M 2025	9M 2026	Change	*Of which Seven Group*
Core Business Sales	460.9	512.0	51.1	70.8
Other revenues	7.5	6.2	-1.3	0.5
Total Revenues	**468.4**	**518.2**	**49.8**	**71.3**
Cost for Raw Materials and Supplies and net increase (decrease) in Inventory	-196.4	-207.6	-11.2	-29.2
Costs for Services and Use of Third-Party Assets	-75.4	-98.2	-22.8	-21.8
Personnel Costs	-95.5	-102.4	-6.9	-5.8
Other Operating Costs	-6.9	-3.7	3.2	-0.4
Adjusted EBITDA	**94.2**	**106.4**	**12.2**	**14.1**
Depreciation & Amortisation	-24.3	-25.3	-1.0	-1.7
Write-Downs	-2.6	-2.9	-0.3	-0.2
EBIT	**67.3**	**78.2**	**10.9**	**12.2**
Financial income/expenses	-20.7	-7.6	13.1	-0.9
Income/expenses from associates at equity method	2.2	1.0	-1.1	-
PBT	**48.8**	**71.6**	**22.8**	**11.3**
Taxes	-11.1	-21.6	-10.5	-3.5
Adjusted Net Profit (Loss)	**37.7**	**50.0**	**12.3**	**7.8**
Adjusted Group Net Profit (Loss)	**36.5**	**48.1**	**11.6**	**7.3**
Adjustments for Non-Recurring Items to EBITDA	-6.6	-15.3	-8.7	-0.5
Adjustments for Non-Recurring Items to Group Net Profit	-15.9	16.0	31.9	-0.4

Key Highlights

Adjusted Group Net Profit at €48.1m in 9M 2026 (€36.5m in 9M 2025)

D&A stood at €25.3m in 9M 2026, +€1.0m vs 9M 2025

PPA amortization was equal to €7.1m in 9M 2026 (stable vs last year)

Financial Income/ Expenses at -€7.6m in 9M 2026 (-€20.7m in 9M 2025), including +€5.3m of foreign exchange effects (-€7.1m in 9M 2025) and -€9.8m of net interest expenses including IFRS 16 (-€11.9m in 9M 2025)

Income from associates related to FILA stake in DOMS (9 months at 19.01%) at €1.0m (€2.0m gross of €1.0m of PPA) vs €2.2m in 2025 (€3.7m gross of €1.5m of PPA, 9 months at 26.01%)

Adjustments for Non-Recurring Items to Group Net Profit mainly related to DOMS capital gain, transaction expenses (M&A, ABB and debt refinancing), provisions for the fire accident in the UK plant of Daler Rowney Ltd, reorganization cost in Mexico and North America, and the performance shares incentive plan

Cash Flow Statement

(€ million)	9M 2025	9M 2026	Change
Adjusted EBITDA	**94.2**	**106.4**	**12.2**
Changes in net working capital	-72.2	-98.2	-26.0
Investments in tangible and intangible assets	-12.0	-12.6	-0.6
Operating Cash Flow	**10.0**	**-4.4**	**-14.4**
IFRS 16 rent payments	-9.6	- 9.8	-0.2
Tax payments	-10.8	-6.8	4
Net financial expenses	-8.9	-6.7	2.2
Net financial expenses IFRS 16	-2.4	-2.2	0.2
Non-monetary costs and other changes	-3.9	10.4	14.3
Adjusted Free Cash Flow to Equity	**-25.7**	**-19.4**	**6.3**
Adjustments for Non-Recurring Items	-6.6	-15.3	-8.7
Reported Free Cash Flow to Equity	**-32.3**	**-34.8**	**-2.5**
Buybacks/ dividends	-42.0	-41.3	0.7
Effect of FX rate movements	-4.1	2.1	6.2
Changes in amortised cost and MTM	-1.4	0.1	1.5
Changes in IFRS 16 Net Financial Position	6.4	1.1	-5.3
Proceeds from sales of stake in DOMS Industries Limited	-	73.8	73.8
Bank & consultancy fees related to refinancing	-	-2.0	-2.0
M&A effects & related advisory costs	-	-54.9	-54.9
Changes due to variation in Consolidation Area	-0.1	-3.4	-3.3
Changes in Reported Net Financial Position	**-73.5**	**-59.2**	**14.3**

Key Highlights

Free Cash Flow to Equity 9M 2026 amounted to -€34.8m, improving vs -€32.3 in 9M 2025, despite Seven Group seasonal cash absorption (-€15.8m)

Change in Net Working Capital amounted to -€98.2m (-€72.2m in 9M 2025) due to the business seasonality and broader perimeter with Seven Group

Capex at €12.6m (€12.0m in 9M 2025) which includes investments for industrial developments

Tax payments at -€6.8m vs -€10.8m in 9M 2025, mainly for lower advanced payments

Net financial expenses at -€6.7m improving vs -€8.9m in 9M 2025, thanks to financial efficiencies

Change in Reported Net Financial Position was equal to -€59.2m in 9M 2026 after -€34.8m of Free Cash Flow to Equity

Net Bank Debt & Net Financial Position

(€ million)	9M 2025	FY 2025	9M 2026	Change	Of which Seven Group
Cash and Cash Equivalents	144.7	112.7	117.8	-26.9	0.1
Financial Liabilities and Receivables	-347.6	-250.9	-316.3	31.3	-19.3
Net Bank Debt	**-202.9**	**-138.2**	**-198.6**	**4.4**	**-19.2**
Amortized Cost	3.9	2.6	0.9	-3.0	0.3
Net Financial Position excl. IFRS 16 and MtM Hedging	**-199.1**	**-135.6**	**-197.6**	**1.4**	**-19.0**
Mark to Market Hedging	-1.6	-1.1	0.7	2.2	0.7
IFRS 16	-53.9	-52.8	-51.8	2.2	-0.6
IFRS 16 Net Financial Position	**-254.6**	**-189.5**	**-248.8**	**5.8**	**-18.8**
LTM Adjusted EBITDA	***108.9***	***105.2***	***117.0***	***8.1***	
Leverage ratio on Net Bank Debt	***1.9x***	***1.3x***	***1.7x***	***-0.2x***	
Leverage ratio on IFRS 16 Net Financial Position	***2.3x***	***1.8x***	***2.1x***	***-0.2x***	

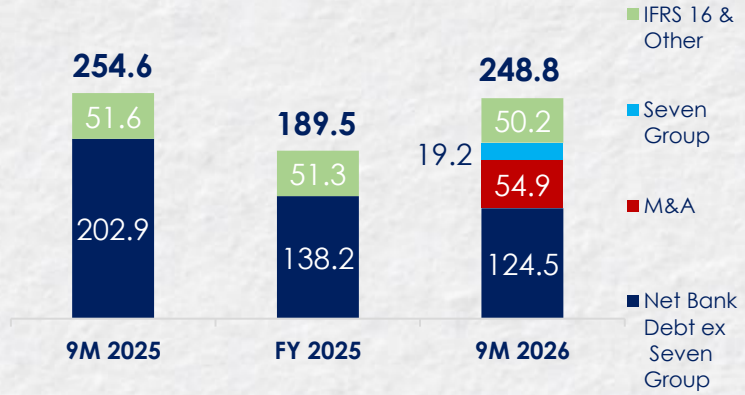
Key Highlights

Net Bank Debt at -€198.6m in 9M 2026, with €4.4m decrease vs 9M 2025 as result of the strong cash flow generation and the disposal of the stake in DOMS for €73.8m, offsetting the acquisition of Seven Group (-€54.9m of total consideration), Seven Group Net Bank Debt (-€19.2m), dividends (-€37.1m), and buyback (-€4.2m in 9M 2026)

The US tariffs refund (€8.6m including interests for €0.3m) received in 9M 2026, offset the relative cash-out

Leverage Ratio on Net Bank Debt at 1.7x in 9M 2026, decreasing vs 1.9x in 9M 2025, thanks to EBITDA improvement and strong cash generation

Net Financial Position and Net Bank Debt



Reported Balance Sheet

(€ million)	9M 2025	FY 2025	9M 2026	Change	*Of which Seven Group*
Intangible Assets	341.5	338.8	369.0	27.5	17.8
Tangible Assets	104.1	103.3	108.0	3.9	2.1
Financial Fixed Assets	142.6	143.7	106.1	-36.5	0.0
Fixed Assets	**588.1**	**585.8**	**583.2**	**-5.0**	**19.9**
Other Non Current Asset/Liabilities	**21.7**	**23.4**	**21.3**	**-0.3**	**1.7**
Trade Receivables	147.7	90.8	212.1	64.3	51.5
Inventories	231.2	227.3	240.6	9.4	20.3
Trade Payables	-80.5	-94.0	-110.1	-29.6	-21.2
Trade Working Capital	**298.3**	**224.1**	**342.5**	**44.2**	**50.7**
Other Current Asset and Liabilities	-2.3	5.8	-5.8	-3.5	-1.4
Net Working Capital	**296.1**	**230.0**	**336.7**	**40.6**	**49.3**
Provision & Funds	-67.0	-69.9	-70.8	-3.8	-2.0
Net Capital Employed	**838.9**	**769.2**	**870.4**	**31.5**	**69.0**
Shareholders Equity	-584.4	-579.7	-621.6	-37.3	-49.3
IFRS 16 Net Financial Position	-254.6	-189.5	-248.8	5.8	-19.6
Total Net Sources	**-838.9**	**-769.2**	**-870.4**	**-31.5**	**69.0**
Trade Working Capital	*298.3*	*224.1*	*342.5*	*44.2*	*50.7*
LTM reported Sales	*580.0*	*572.2*	*632.6*	*52.6*	*80.0*
Trade Working Capital % LTM Sales	***51.4%***	***39.2%***	***54.1%***	***2.7%***	***63.3%***

Key Highlights

Intangible Asset at €369.0m, increased of €27.5m, mainly reflecting Seven Group Goodwill (€13.6m) and Trademarks (€17.2m)

Financial Fixed Assets largely composed of FILA's 19.01% stake in DOMS for €105.2m under the equity method, decreasing from end of 2025 due to the sale of 7% stake in DOMS

Shareholder Equity at €621.6m, equal to c. €12.2 per share

Trade Working Capital increases to €342.5m, with a percentage of sales at **54.1% in 9M 2026** from 51.4% in 9M 2025, due to the consolidation of Seven Group

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DOMS Industries Market Data

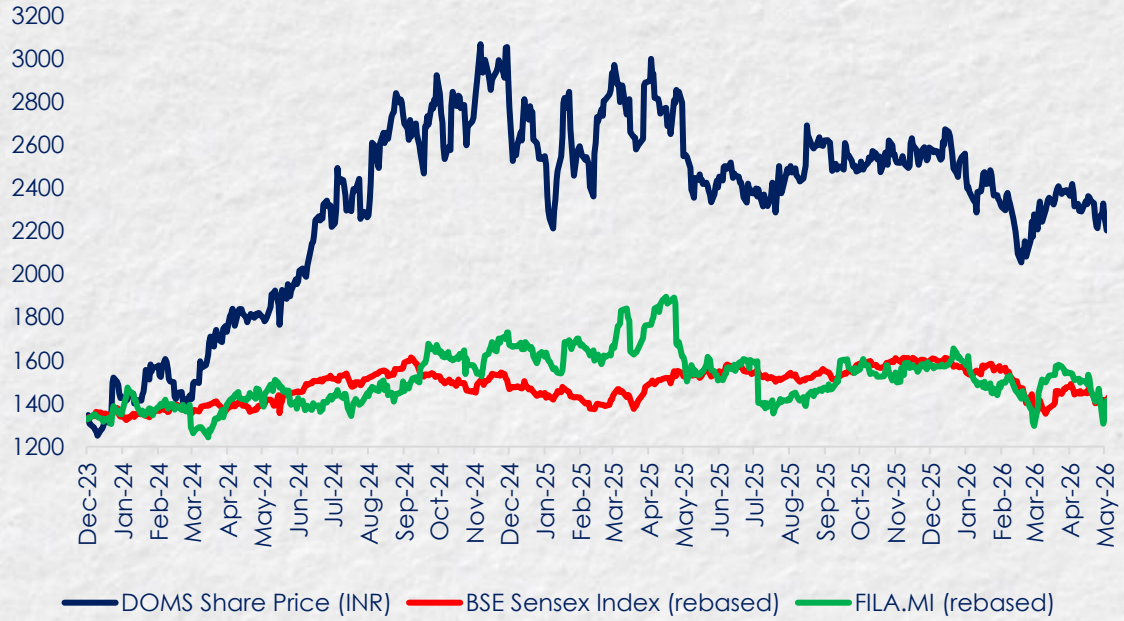
DOMS Consensus Results and Broker Recommendations
(source: Refinitiv, Nov 11th, 2026)

INR millions	Mar 2026A*	Mar 2027E	Mar 2028E	Mar 2029E
Sales	23,264	27,815	33,396	40,238
EBITDA	4,026	3,587	5,253	6,525
EBIT	3,145	2,517	3,841	5,047
Net Income	2,302	1,909	2,931	3,747

Broker	Rating Date	Rating	Target Price (INR)
Antique Stockbroking	05 Nov '26	Buy	2,831.00
BNP Paribas	04 Nov '26	Outperform	2,540.00
JM Financial Inst. Securities	05 Aug '26	Add	2,560.00
ICICI Securities	04 Nov '26	Buy	2,200.00
Nirmal Bang	04 Nov '26	Buy	2,885.00
Edelweiss Capital	03 Nov '26	Buy	2,773.00
360 ONE Capital Market	04 Nov '26	Buy	2,645.00
Investec Bank	12 Oct '26	Buy	2,575.00
Prabhudas Lilladher	09 Oct '26	Buy	2,783.00
East India Securities	06 Aug '26	Buy	2,791.00
Ambit Capital	05 Aug '26	Sell	2,316.00
AMSEC	04 Nov '26	Buy	2,290.00
Average	/	/	**2,599.08**

** Note: DOMS Industries fiscal year falls on 31 March*

DOMS Industries Share Price Performance



DOMS Share Price on 11th Nov 2026 (INR)	**2,019.40**
DOMS Market Cap (INR bn)	**122.56**
FILA Stake (%)	**19.01%**
FILA Stake (INR bn)	**23.30**
EUR/INR	**103.83**
FILA Stake (€m)	**224.38**
FILA Market Cap (€m)	**464.63**

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1. Highlights
2. Business Review
3. Financial Review
4. DOMS Industries

Appendices:

1. 9M and Q3 EBITDA ex IFRS-16
2. Exchange rates



Adjusted EBITDA – 9M & Q3 2026 Results

	9M 2025	9M 2026	2025 Margin	2026 Margin	Delta (%)	Q3 2025	Q3 2026	2025 Margin	2026 Margin	Delta (%)
Total Fila Group	**94.2** **85.0**	**106.4** **96.7**	**20.4%** **18.4%**	**20.8%** **18.9%**	**13.0%** **13.8%**	**28.9** **25.8**	**30.6** **27.6**	**19.7%** **17.6%**	**18.1%** **16.3%**	**5.9%** **6.8%**
North America	50.6 47.1	59.0 55.5	22.3% 20.7%	27.0% 25.3%	16.7% 17.9%	16.2 15.1	16.0 14.8	22.4% 20.9%	22.0% 20.4%	-1.5% -1.8%
Europe	29.4 26.9	40.8 37.9	17.5% 16.0%	17.7% 16.4%	38.9% 40.8%	9.0 8.2	13.1 12.2	16.5% 15.0%	17.0% 15.9%	45.2% 49.2%
C&SA	10.1 8.0	4.6 1.8	18.4% 14.7%	9.1% 3.6%	-54.0% -77.2%	2.0 1.3	0.9 0.1	12.7% 8.2%	5.9% 0.4%	-55.0% -95.2%
Asia	3.8 2.7	1.6 1.4	45.5% 33.2%	19.4% 17.0%	-56.3% -47.6%	1.5 1.2	0.5 0.4	52.4% 41.0%	17.2% 14.7%	-68.3% -65.3%
RoW	0.4 0.2	0.3 0.1	13.8% 8.2%	9.0% 3.6%	-25.8% -50.3%	0.1 0.1	0.1 0.1	15.4% 10.1%	12.6% 7.8%	2.0% -3.3%

Adjusted EBITDA Including IFRS 16

Adjusted EBITDA Excluding IFRS 16

Exchange Rates (source: Bank of Italy)

Currency		Avg 9M 25	Avg 9M 26	30/09/2025	31/12/2025	30/09/2026
Argentinean Peso	ARS	1,322.10	1,674.73	1,593.74	1,707.56	1,728.84
Australian Dollar	AUD	1.74	1.65	1.78	1.76	1.63
Brazilian Real	BRL	6.32	5.98	6.24	6.44	5.91
Canadian Dollar	CAD	1.56	1.61	1.63	1.61	1.61
Swiss Franc	CHF	0.94	0.92	0.94	0.93	0.95
Chilean Peso	CLP	1,069.05	1,051.99	1,133.45	1,058.13	1,104.42
Renminbi Yuan	CNY	8.07	7.93	8.36	8.23	7.61
Dominican Peso	DOP	68.35	69.69	73.20	74.14	67.73
UK Pound	GBP	0.85	0.86	0.87	0.87	0.85
Hong Kong Dollar	HKD	N.A.	9.10	N.A.	9.15	8.91
Indonesian Rupiah	IDR	18,358.44	20,231.39	19,578.94	19,640.83	20,315.34
Shekel	ILS	3.93	3.52	3.88	3.75	3.49
Indian Rupee	INR	96.74	109.08	104.25	105.60	108.82
Mexican Peso	MXN	21.80	20.20	21.53	21.12	20.58
Nuevo Sol	PEN	4.05	3.95	3.91	3.95	3.91
Polish Zloty	PLN	4.24	4.27	4.27	4.22	4.37
Russian Ruble	RUB	94.78	90.96	97.22	93.61	94.47
Swedish Krona	SEK	11.10	10.89	11.06	10.82	11.33
Turkish Lira	TRY	43.29	53.08	48.82	50.48	55.66
US Dollar	USD	1.12	1.16	1.17	1.18	1.14
South African Rand	ZAR	20.27	19.01	20.28	19.44	18.61

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Q&A



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