transense technologies plc

Final Results FY25

Year ended 30th June 2025

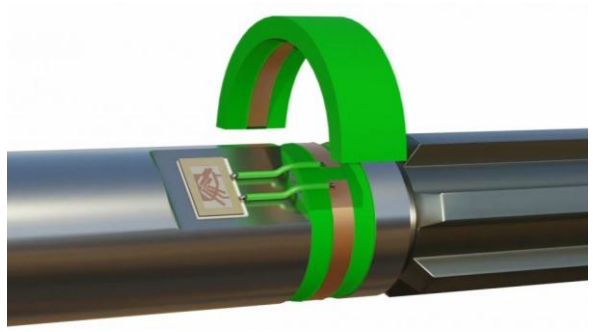
23 September 2025

Design and supply of advanced sensor solutions for accurate non-contact measurement of torque, force, pressure & temperature

An enabling technology to improve control, efficiency and performance in electric motors and actuators, robotic systems, aerospace and machinery

Growing pipeline of world class customers in targeted high growth markets

Benefits: increased power & range, enhanced safety & reliability, improved efficiency and reduced in-service costs



Development and supply of smart, connected tyre inspection and data collection tools for the truck & bus market

Used by global tyre suppliers, leading commercial vehicle vehicle fleet operators & service centres for vehicle inspection and inventory management

Carry out fast, accurate measurement and capture of tyre tread depth, pressure, TPMS & RFID tag data

Benefits: reduce fleet operating costs and downtime, improve vehicle safety and audit trail

Financial Highlights – trading in-line, investing for the future

- Revenue up 33%, PBT up 12%
- Operating cash conversion 145% of PBT (FY24: 124%)
- Closing net cash of £1.14m (FY24: £1.28m)

SAWsense – demonstrable traction, scale-up underway

- Revenue up 149% to £1.12m (FY24: £0.45m)
- Deepening relationships and increased on-boarding
- Production line & component sourcing on schedule and on budget
- Engineering & BD resources added for depth & resilience

Translogik – firm foundations, improving visibility

- Revenue up 18% to £1.32m (FY24: £1.12m)
- Tyre majors up overall despite “pause” with 1 customer
- Territory distributors and software partners added and ramping up
- Sales organisation revamped – pipeline visibility increasing
- New product options for launch in FY26

FINANCIAL SUMMARY

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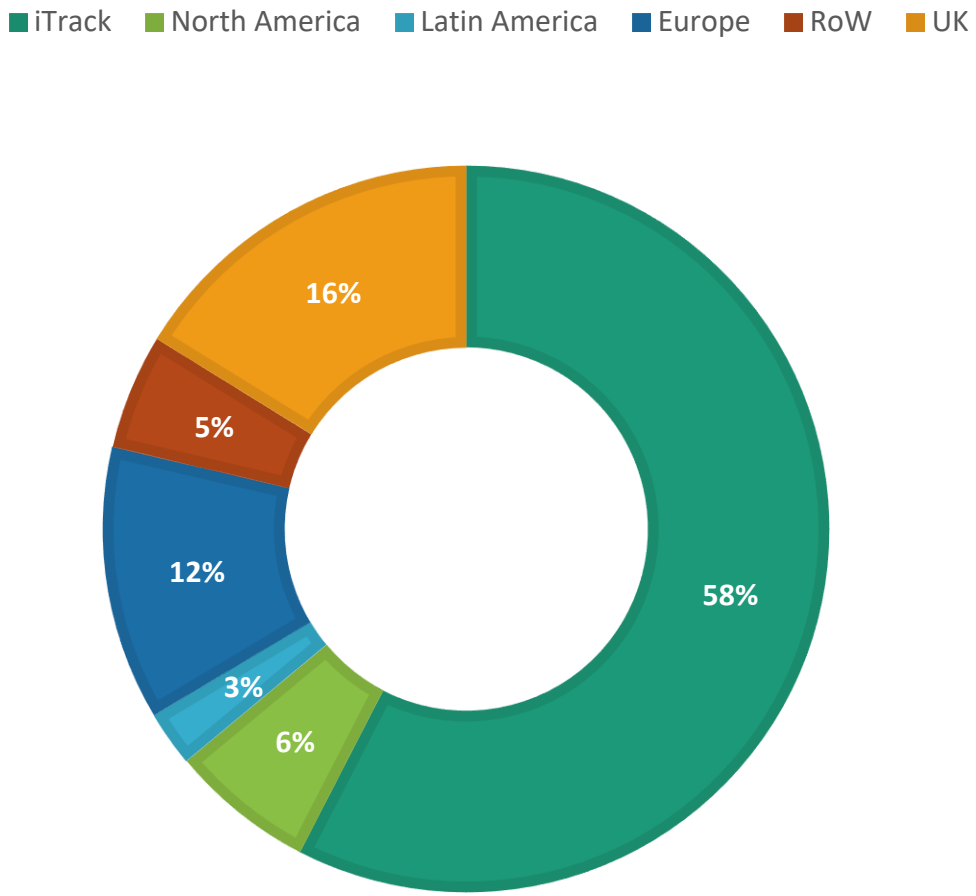
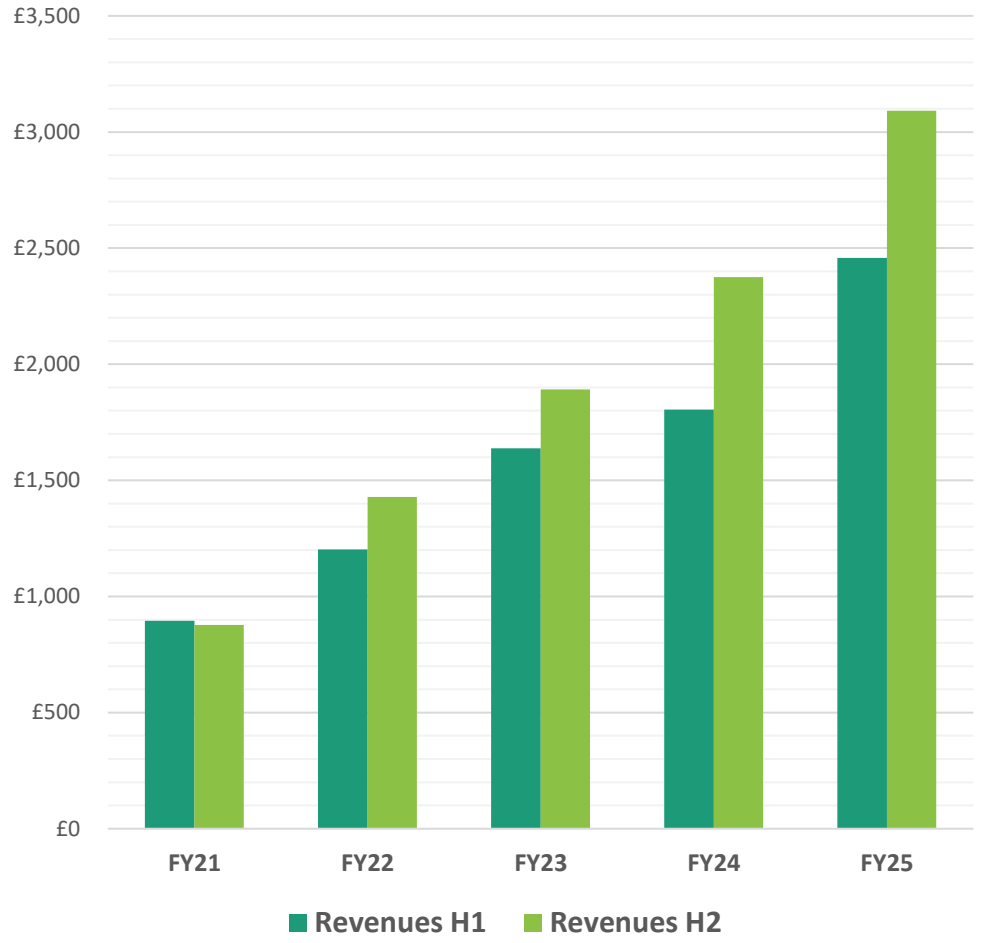
Income Statement	FY25	FY24	Highlights
	£m	£m	
Revenue	5.55	4.18	*Revenues increase by 33%*
Gross Profit	4.99	3.66	
GP %	89.9%	87.6%	*Increased GP*
Operating expenses	(3.17)	(2.03)	*Opex investment in head count*
AEBITDA	1.82	1.63	*AEBITDA up by 19%*
AEBITDA %	32.8%	39.0%	
Depreciation	(0.24)	(0.15)	
Amortisation	(0.17)	(0.15)	
Finance Income	0.00	0.03	
EBT	1.41	1.36	*EBT up by 12%*

results in line with expectation……improving margins…….investing for the future……tax losses £19m+

REVENUES BY DESTINATION



Total Revenues H1 v H2

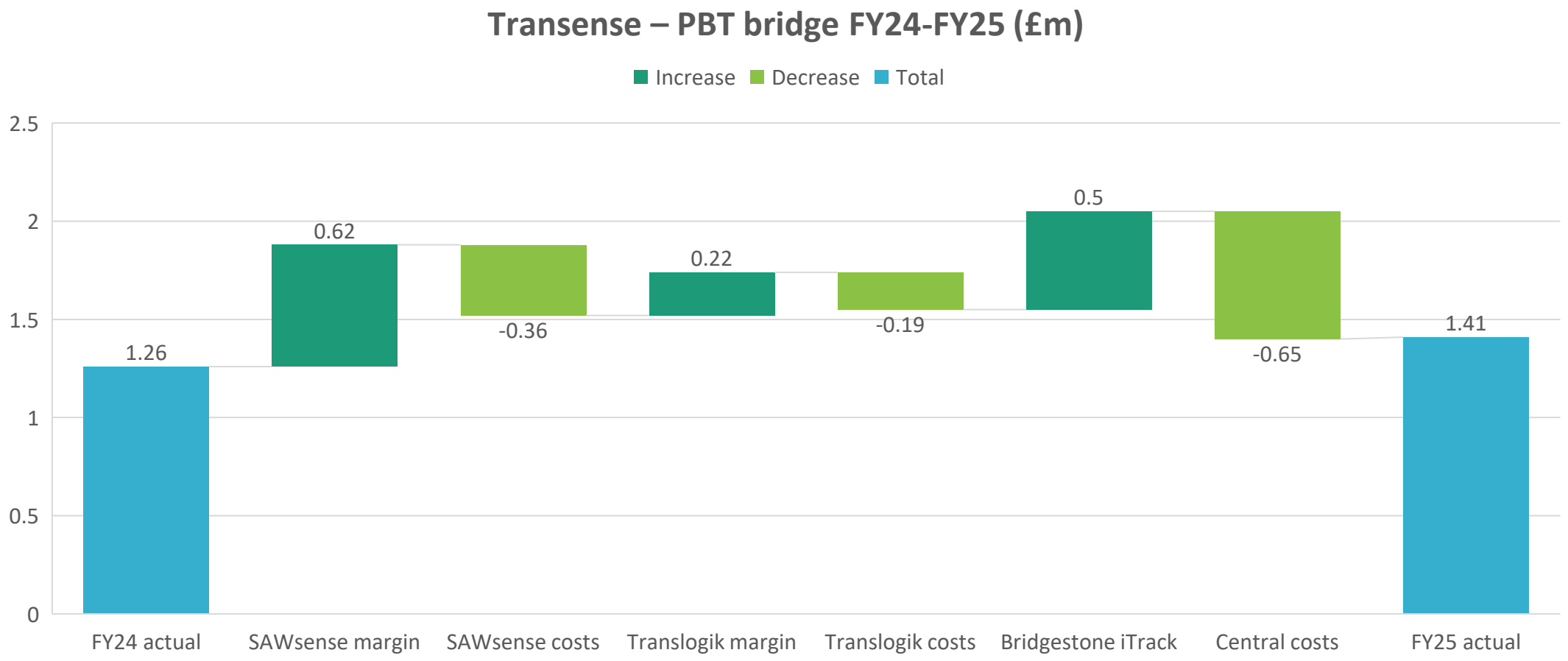


….truly global business, limited UK market exposure……

….revenue sustaining momentum over five years……

Segmental	FY25	FY24	Changes
	£m	£m	
Revenue	**£5.55**	**£4.18**	**33%**
SAWsense	£1.12	£0.45	149%
Translogik	£1.32	£1.12	18%
Bridgestone iTrack	£3.11	£2.61	19%
EBT	**£1.41**	**£1.26**	**12%**
SAWsense	(£0.46)	(£0.71)	35%
Translogik	£0.37	£0.34	9%
Bridgestone iTrack	£3.07	£2.57	19%
Central overheads	(£1.57)	(£0.94)	(67%)

….high growth in operating businesses……fixed cost base can support much larger business in future



….volumes and margins up……investment in people to deliver future growth….

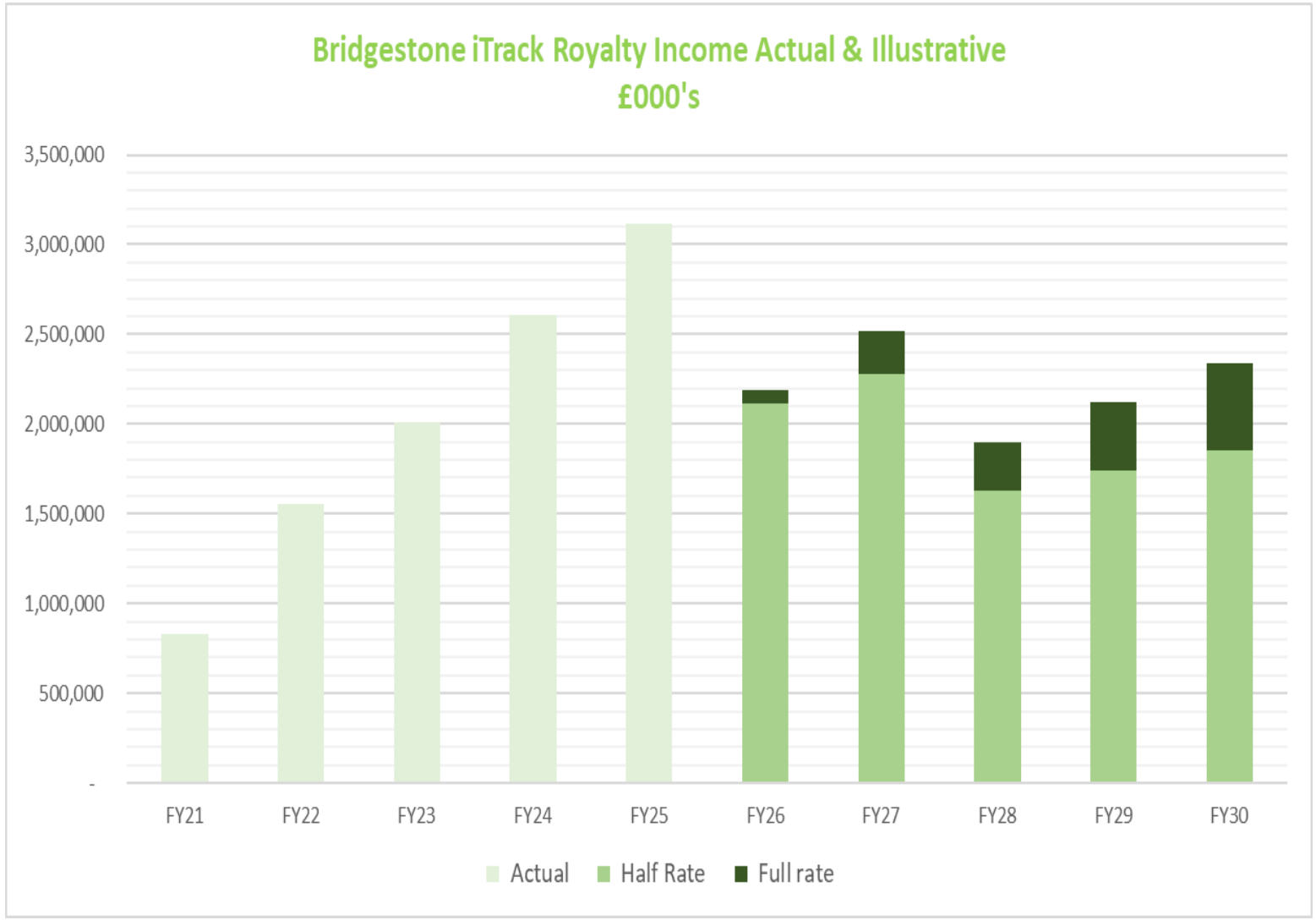
8. PBT bridge analysis

Cash Flow statement Statement	FY25	FY24
	£m	£m
EBT	**1.41**	**1.26**
Adjustment for non-cash items	**0.55**	**0.40**
Working capital movement	**0.09**	**(0.10)**
Operating cash Flow	**2.05**	**1.56**
Capex	**(2.09)**	**(0.88)**
Cash flow before financing	**(0.04)**	**0.68**
Share buyback	-	**(0.32)**
Other	**(0.10)**	**(0.06)**
Net cash (outflow)/inflow	**(0.14)**	**0.03**

….cash generative from operations……investing to scale-up SAWsense……financially self-sufficient ….asset financing secured

Balance Sheet	FY25	FY24	Highlights
	£m	£m	
Fixed Assets	**3.67**	**1.92**	***Increased investment***
Tangibles	1.55	0.89	
Intangibles	2.12	1.03	
Working capital	**1.21**	**1.30**	
Inventories	0.38	0.39	
Receivables	1.64	1.40	
Payables	(0.81)	(0.49)	
Cash	**1.14**	**1.28**	***Cash relatively unchanged***
Lease liabilities	(0.37)	**(0.40)**	
Deferred taxation	1.47	**1.47**	***Tax losses £19m***
Net assets	**7.12**	**5.57**	***Distributable reserves up to £4.8m***

….anticipate similar level of capex in FY26 to complete projects in progress……net assets up to 47p per share



BRIDGESTONE

Over fivefold increase in installations since 2020

Unit rate reduced to 60% post June 2025 and 40% post June 2027 through to expiry in June 2030

Illustration assumes an average incremental increase in monthly truck numbers based on actual average in years 1 to 5

Royalties earned to date £10m – illustration suggests further £9.5m to £11m.

11. Bridgestone iTrack royalty income

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SAW
sense

- Surface Acoustic Wave (SAW), a patented sensor technology used in performance and safety critical applications
- A novel sensing principle that is proven to deliver levels of performance not possible with conventional sensors
- The business model has adapted to make SAW more accessible to new customers and de-risked adoption
- Delivering increased customer engagement, revenue growth and long-term business value




13. SAWsense – Introduction/Recap

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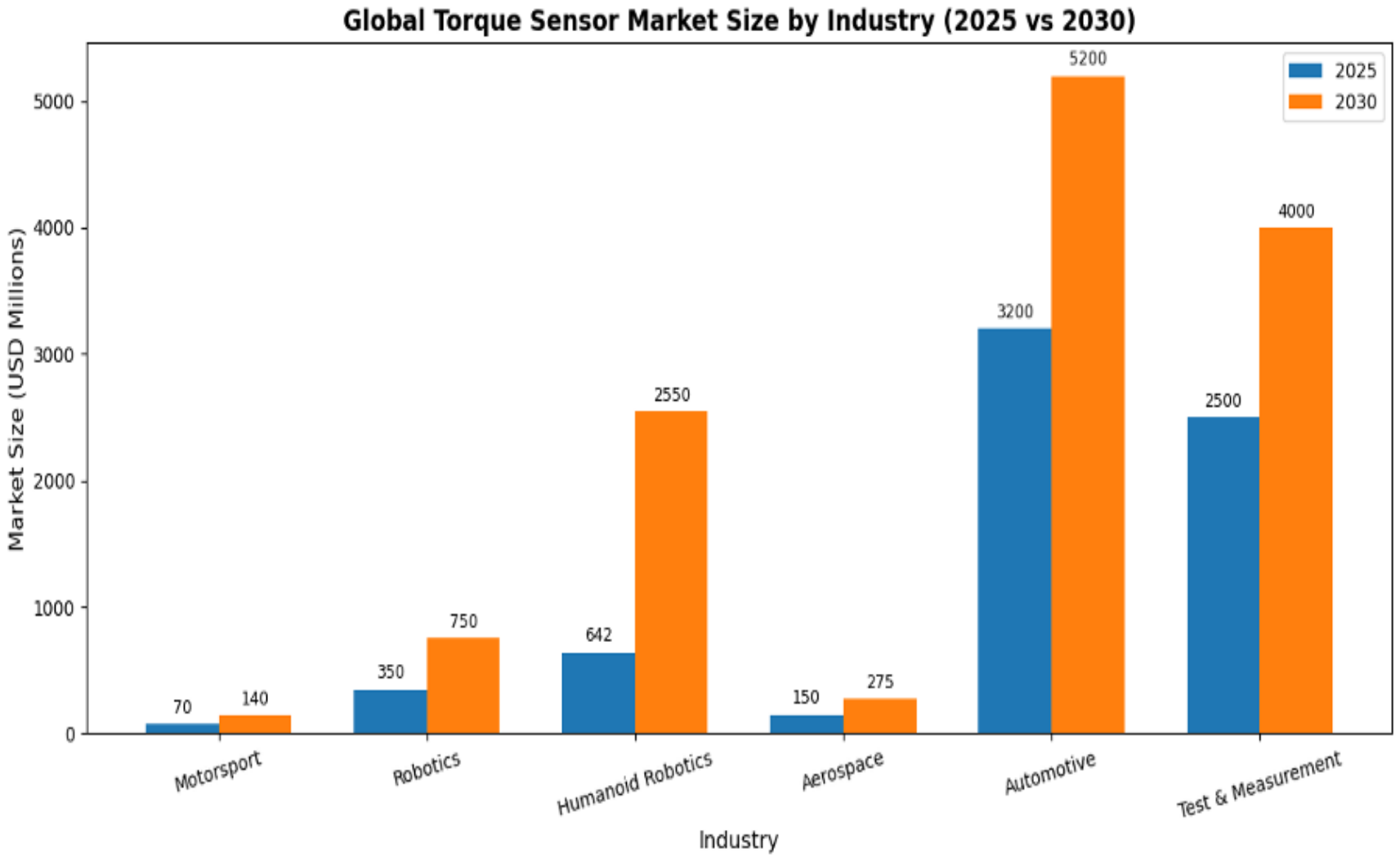


2024 Market Size:

USD $ **9.6 billion** [1]

2030 Forecast:

USD £ **18.4 billion** [1]

CAGR:

7.49% (2025–2033)
[1]

References

[1] Torque Sensor Market Size, Share, Trends, Analysis 2025-2033

14. Opportunities - Torque Sensor Market Size & Forecast

Robotics & Industrial Automation

Rapidly growing traction in the Robotics market with global technology leaders, early stage but fast-moving projects with significant revenue potential

Aerospace & Defence

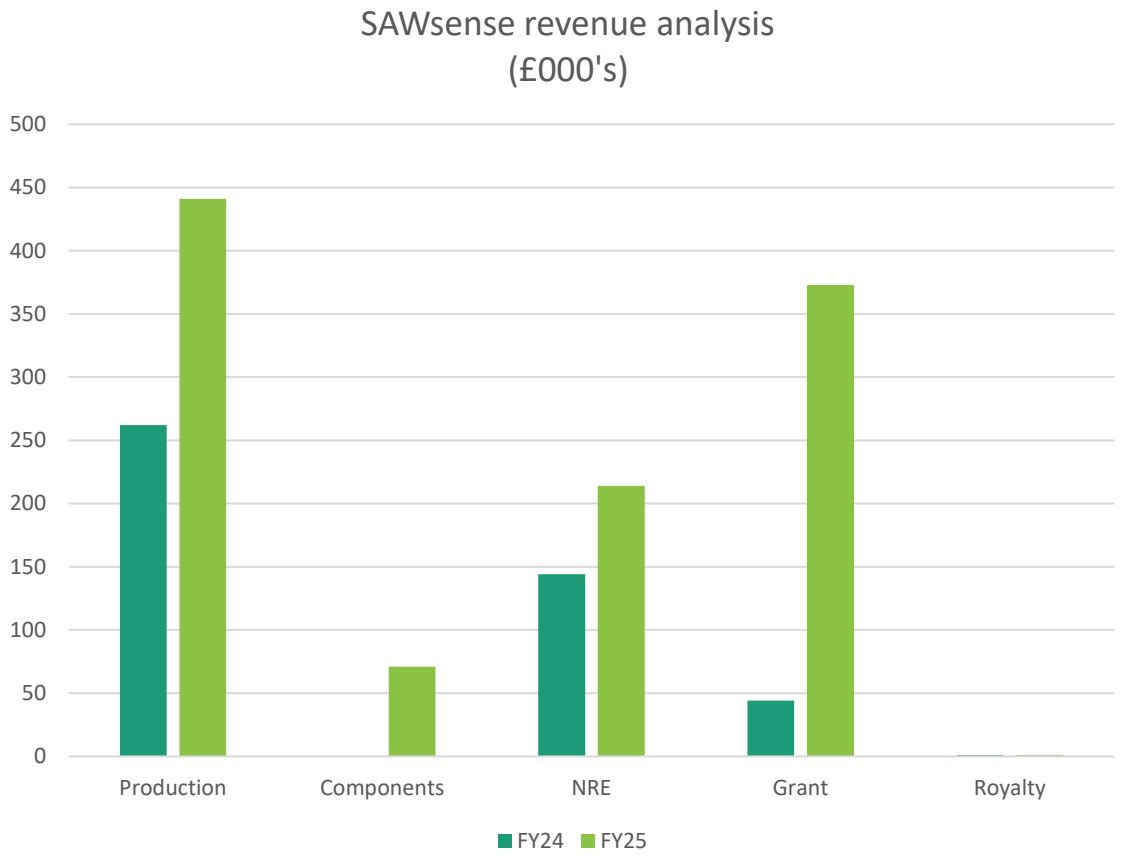
Increased engagement with GE Aerospace. Strong presence in the Aerospace market with several leading OEMs & Tier 1's, increasing project activity and maturity driving short-term revenue and longer-term prospects

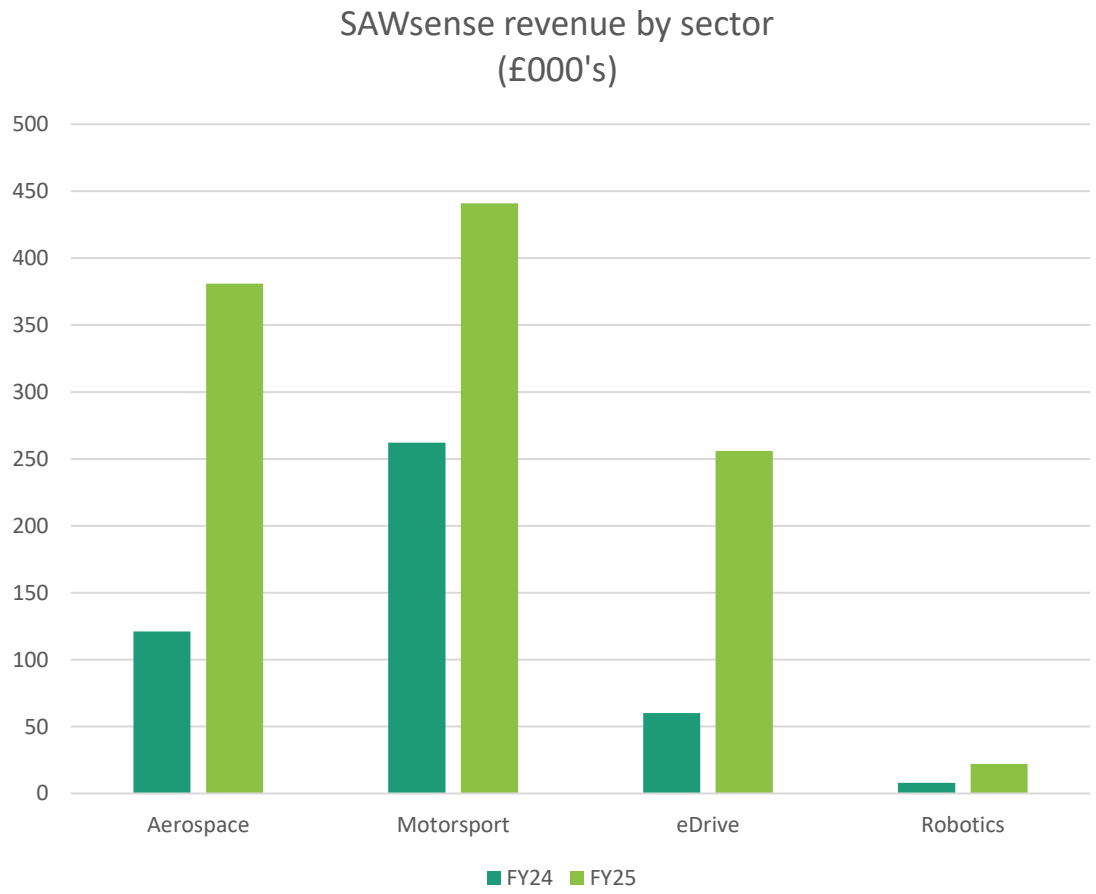
eDrives

Growing presence in the Automotive market with several leading OEMs & Tier 1's, developing new applications where no other sensors can deliver. Very high longer-term prospects.

Motorsport

Well established, proven performance and reliability, opportunity to significantly grow business in the near-term by unlocking more applications for SAW.





….first sale of components under new model…key enabler in aerospace & motorsport…..exciting new prospects in robotics

16. SAWsense Revenue Analyses

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Pipeline

Depth and breadth of engagement with customers and markets

Parts

Availability of dedicated components at right scale, quality and cost

Processes

Appropriate industrial production techniques and equipment

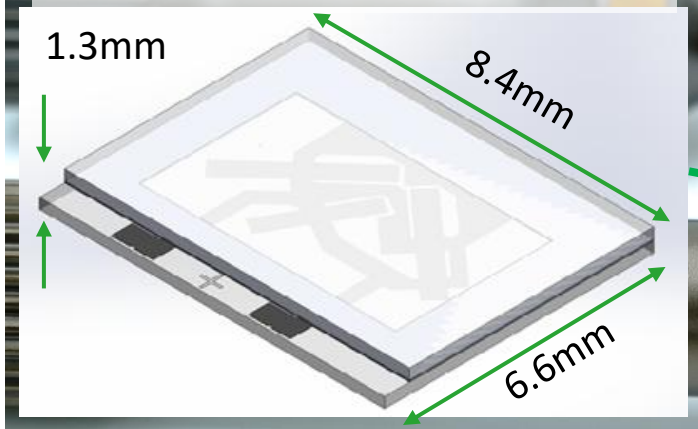
People

Engineering and production team with required skills and experience

	Pre-Contract Under Discussion	← ---------- On Contract ---------- →				
		Feasibility	Prototype	Development	Pre-production	Production
Aerospace	US Tier 1 EU Engine OEM 2 EU Engine OEM 3 EU Engine OEM 4 EU Aircraft OEM 2 US Aircraft OEM 1 EU Tier 1	EU Engine OEM 1	Airbus LANDOne EU Aircraft OEM 1 EU Tier 1	GE HEAT GE/CFM RISE	GE T901	
Motorsport			2 x new race series programs with MA			2 x race series programs with MA
eDrives	EU Tier 1 (Steer) EU Tier 1 (Steer) UK Vehicle OEM (Steer) EU Tier 1 (Drive) EU Vehicle OEM (Drive) EU Tier 1 (Steer) US Tier 1 (Temp) US Tier 1 (Drive)		Novares (Temp) US Tier 1 (Drive)	Protean PULSE EU Tier 1 (On Hold) EU Tier 1 (Drive)		
Industrial/ Robotics	US Transmission Tier 1 EU Robotics OEM EU Robotics Tier 1 EU Robotics Tier 1 EU Robotics OEM US Robotics OEM		EU Robotic Drive Tier 1	EU Robotics OEM US Robotics OEM		

18. Pipeline – Customer engagement - (redacted)

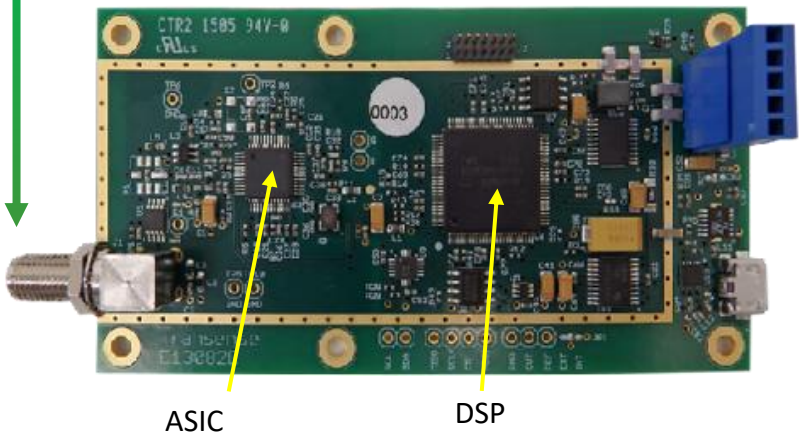
Torque & Temperature Sensing Element (AQP)



RF Rotary Coupler

RF Stationary Coupler
Attached to engine / transmission

Reader Electronics



Engine Output/Transmission Input Shaft
C. 30mm diameter 2,000Nm, 12k rpm, max temp 150degC

19. Parts – Example Shaft Torque Measurement System

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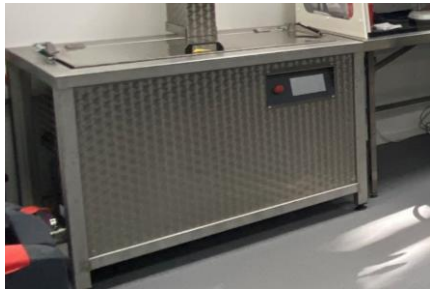
Incoming shaft preparation → AQP die bond → RF Coupler assembly & installation → Wire bond AQP to RF Coupler → Auto-Calibration Rig



Ordered	✓	✓	✓	✓	✓
Delivery	✓	**October 25**	✓	✓	✓
Commissioning	✓	**December 25**	✓	**October 25**	✓

20. Processes - pilot AQP Installation Line

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- **Market leading smart connected tyre inspection and management tools**
- **Reducing operating costs and improving road safety**

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Bluetooth Data Transfer

Local App

Cloud Data Management

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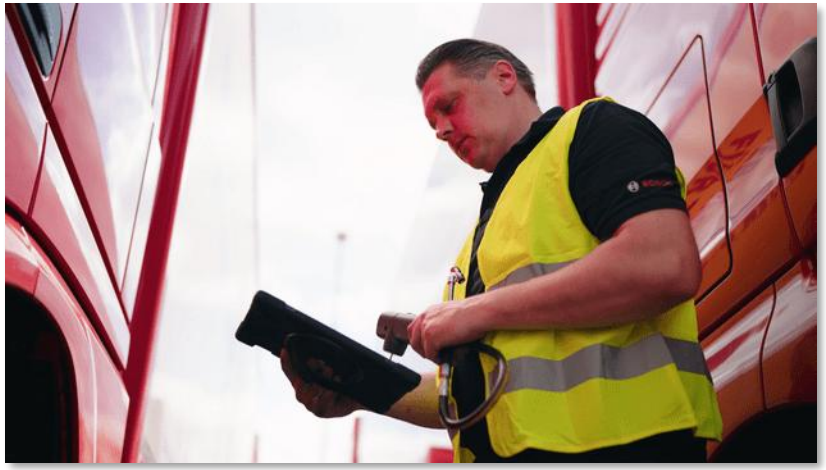
1. **Build with existing** tyre industry customers, expand sales within their global organisations

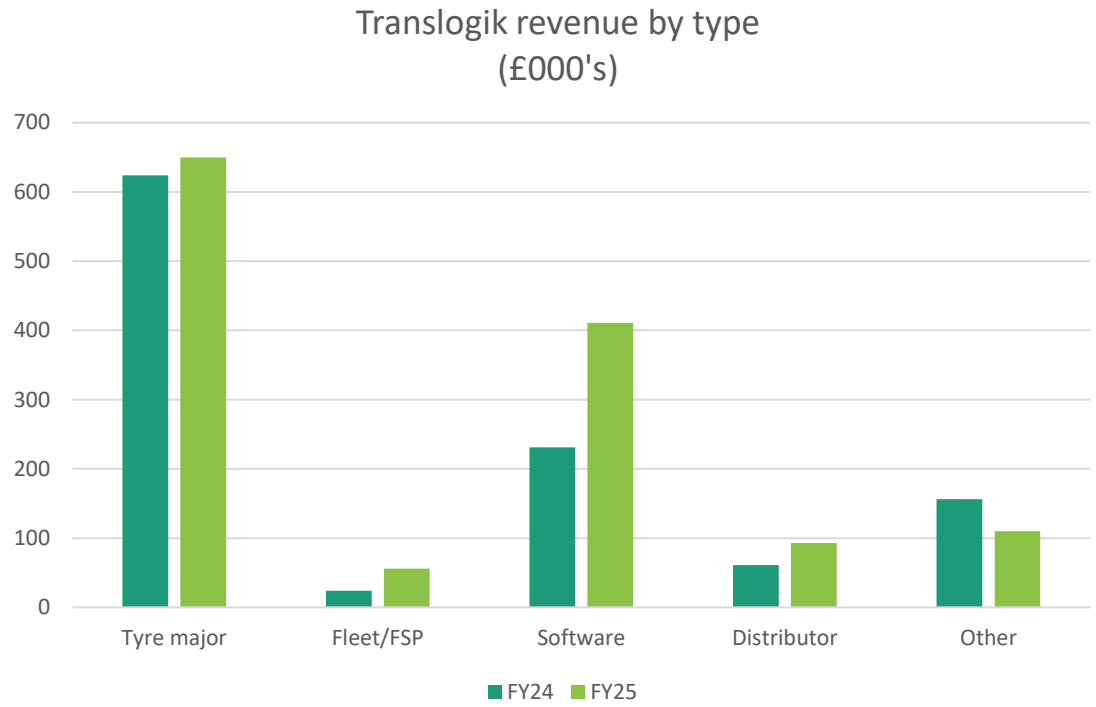
2. Expand and **establish new partnerships** with tyre and fleet management software developers

3. **Develop new direct sales** to service centres and fleet operators with bundled solutions

4. Build upon new **distribution partnerships** with territory distributors and add additional partners where appropriate

5. Launch **new product variants** into market to expand reach





….revenue up 18%……sales structure revamped for FY26….

- **Overall revenue up 18%** - >50% pro-forma excluding largest account in FY24 on “pause”
- **Global tyre majors –** revenue up 3% despite challenging market conditions
- **Service centres and fleet operators** – uptake slow in FY25 but key platform for growth in FY26
- **Tyre and fleet management software developers –** important new relationships driving opportunities
- **Distribution partnerships –** new territory distributors appointed with more to follow in FY26
- **New product variants** ready for FY26 launch

24. Translogik - FY25 – a platform for further growth

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Current trading:

- **Revenues from operating businesses up 23% on prior year**
- **iTrack down 30% reflecting unit rate reduction offset by volume increase**
- **SAWsense order book doubled to £0.47m (excluding grant income) since 1 July 2025**
- **Translogik enters year with £0.25m order book from subscription**
- **August net cash £1.17m**

This financial year:

- **Sales momentum gathering across both businesses**
- **Healthy pipeline & enquiry levels**
- **Visibility improving, though detailed forecasting still uncertain in scale up phase**

Outlook:

- **Managing cash headroom whilst investing for success**
- **Building strategic value proposition across both businesses**

Website: https://www.transense.com

YouTube: https://www.youtube.com/@transense

Q & A

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APPENDICES

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Key Torque Sensor Applications in Aerospace:

1. Propulsion Systems & Rotorcraft Drivetrains
- Measuring torque in jet engines, turboprops, helicopter main and tail rotor shafts and electric propulsion units.
- Optimizes engine performance, fuel efficiency, and safety. Monitors load distribution and prevents mechanical failure.

2. Flight Control Systems
- Monitoring torque in actuators and control surfaces (e.g., ailerons, rudders, elevators).
- Ensures accurate and responsive control of the aircraft during flight.

3. Ground Testing and R&D
- Torque sensors are used in test rigs for engines, gearboxes, and structural components.
- Validates designs and materials under simulated flight conditions.

4. Spacecraft and Satellite Mechanisms
- Torque monitoring in robotic arms, antenna deployment, and solar array drives.
- Ensures precise movement and deployment in zero-gravity environments.

5. Structural Health Monitoring
- Embedded torque sensors in critical joints and fasteners.
- Detects stress, fatigue, or deformation over time.

6. Electric Aircraft and UAVs
- Torque measurement in electric motors and control actuators.
- Enhances control precision and energy efficiency in next-gen aircraft.

2025 Market Size:
USD $ **150**[1] **to 500** [2] **million**

2033 Forecast:
USD $ **275**[1] **to 797** [2] **million**

CAGR:
6[2] **to 7%** [1]
(2025–2033)

References
[1] Emerging Market Insights in Aerospace Industry Torque Sensor: 2025-2033 ...
[2] Aerospace Industry Torque Sensor Projected to Grow at XX CAGR: Insights ...

Key Torque Sensor Applications in Automotive:

1. **Electric Power Steering (EPS)**
- Replaces hydraulic systems with torque-based electronic control
- Enhances fuel efficiency and enables ADAS integration

2. **Powertrain & Drivetrain Monitoring**
- Real-time torque feedback for engine, transmission, and axle systems
- Essential for hybrid and electric vehicle (EV) optimization

3. **Brake-by-Wire & Steer-by-Wire Systems**
- Torque sensors enable precise control in next-gen braking and steering

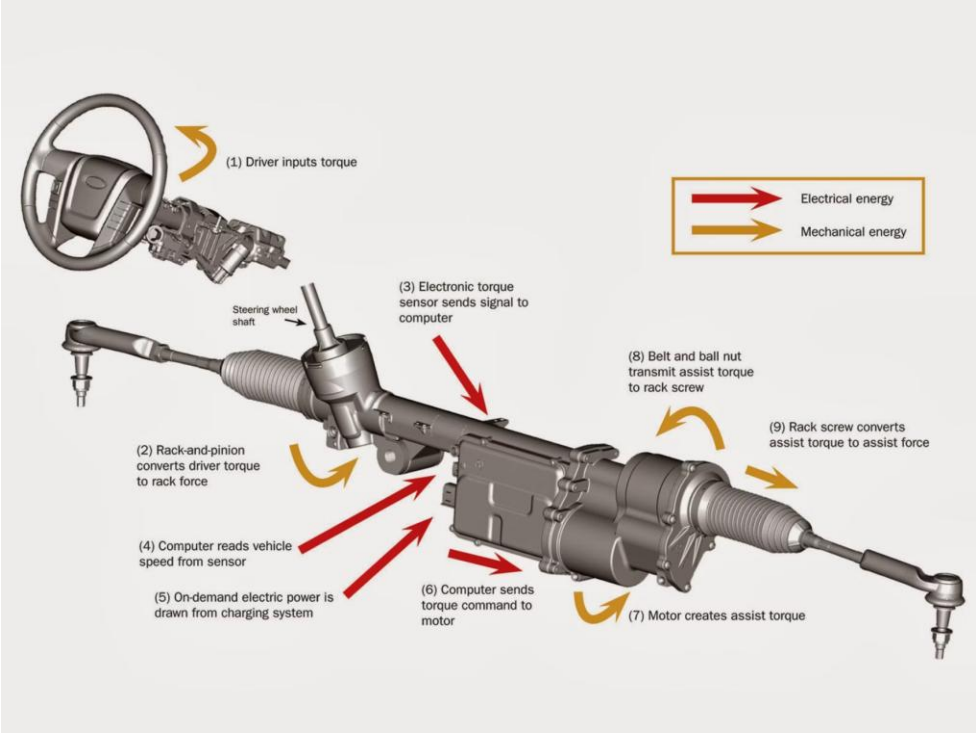
4. **Chassis Dynamics & Suspension Systems**
- Used in active suspension and torque vectoring for improved handling

5. **Testing & Validation**
- Torque sensors are critical in R&D for engine, gearbox, and component testing

2024 Market Size:
USD $ **3.2 to 3.5 billion** [1]

2030 Forecast:
Projected to exceed USD £ **5.2 billion** [1]

CAGR:
7 to 8% (2025–2033) [1]



References
[1] Torque Sensor Market Size, Share, Trends, Analysis 2025-2033
[2] Torque Sensor Market Size, Share Report & Industry Growth 2032

Growth Drivers

- Increased automation in manufacturing and logistics.
- Rising adoption of collaborative robots (cobots) that require precise force and torque feedback.
- Demand for high-precision, real-time control in robotic arms, exoskeletons, and surgical robots.
- Advancements in non-contact sensing technologies like SAW and optical torque sensors [2].

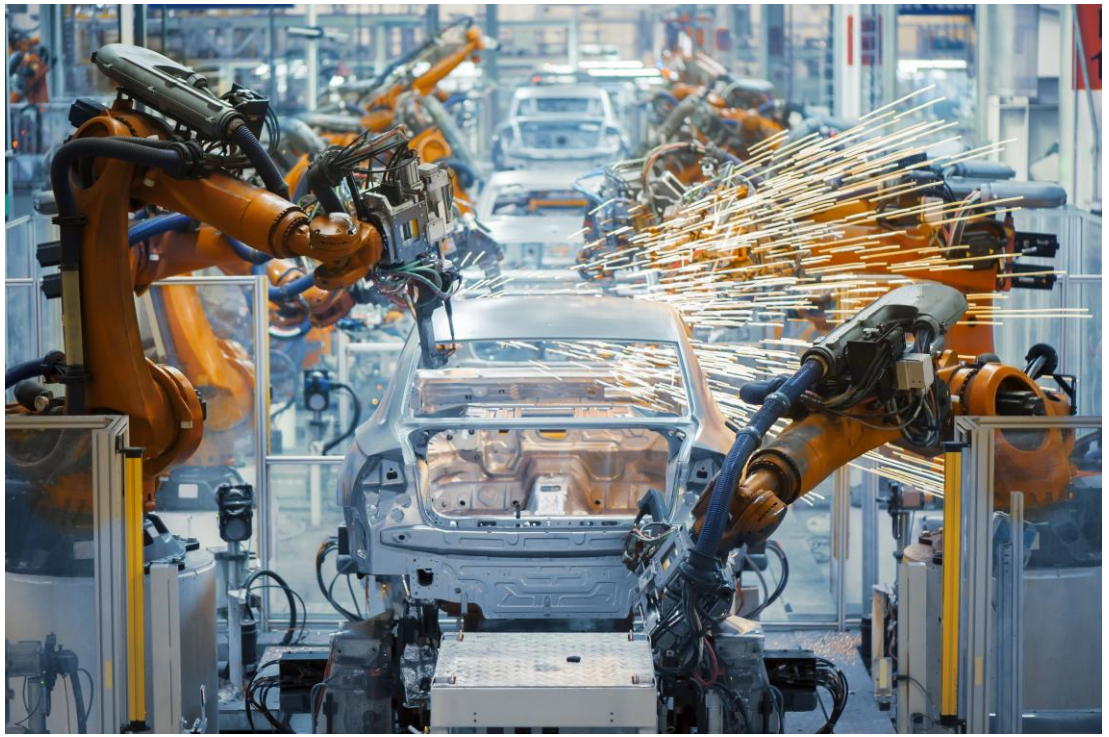
Key Trends

- Miniaturization of sensors for compact robotic systems.
- Integration with AI and machine learning for adaptive force control.
- Growth in wireless and battery-free torque sensing solutions.
- Emphasis on predictive maintenance and real-time diagnostics.

2023 Market Size:
USD $ **350 million** [1]

2030 Forecast:
USD $ **750 million** [1]

CAGR:
8.5% [1] (2025–2033)



References
[1] Robot Force Torque Sensor Market Report | Global Forecast From 2025 To 2033
[2] Torque Sensor Market Size, Share, Trends, Analysis 2025-2033

C - Torque Sensor Market in Robotics (excl Humanoid)

Growth Drivers:

- Performance optimization: Teams use torque sensors to fine-tune power delivery, suspension, and drivetrain behaviour.
- Electric motorsport (e.g., Formula E, IMSA GTP): Requires precise torque feedback for energy efficiency and control.
- Data-driven engineering: Real-time torque data is critical for simulation, predictive maintenance, and race strategy.
- Regulatory integration: Torque sensors now play a role in race control and compliance (e.g., stint energy limits).

Key Trends:

- Increased use of real-time telemetry
- Growth in electric and hybrid racing
- Regulatory adoption of torque sensors for performance parity and energy management

2025 Market Size:
USD $ **60 to 80 million** [1]

2030 Forecast:
USD $ **130 to 160 million** [1]

CAGR:
10 to 12% [1]
(2025–2033)

D - Motorsport Torque Sensor Market

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