



Final Results FY26

Year ended 30th June 2026

22 September 2026



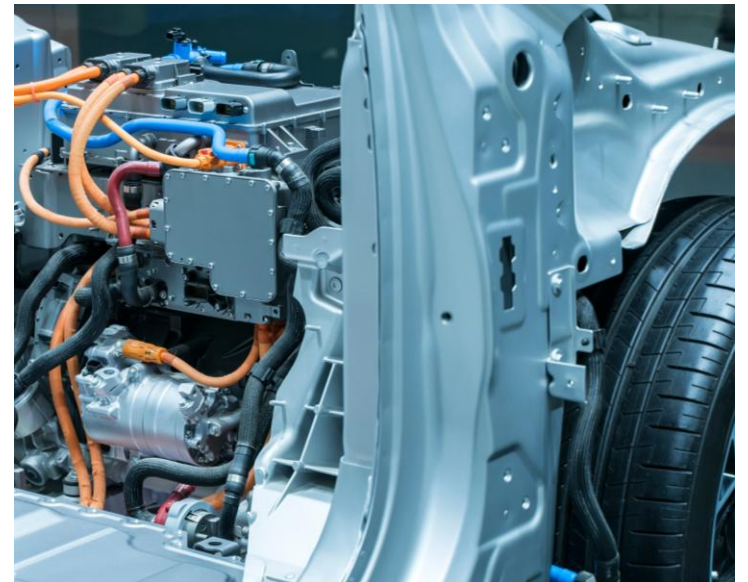
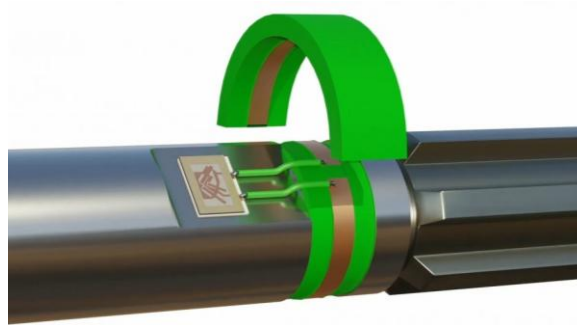
- **Revenue** up 20%
- **Aerospace** building
- **Motorsport** flat
- **Automotive EV** demo unit
- **Robotics** customer wins

- **Revenue** flat overall
- **Tyre majors** down 34%
- **Strong new business** growth
- **New products** launched
- **Post-period** customer wins

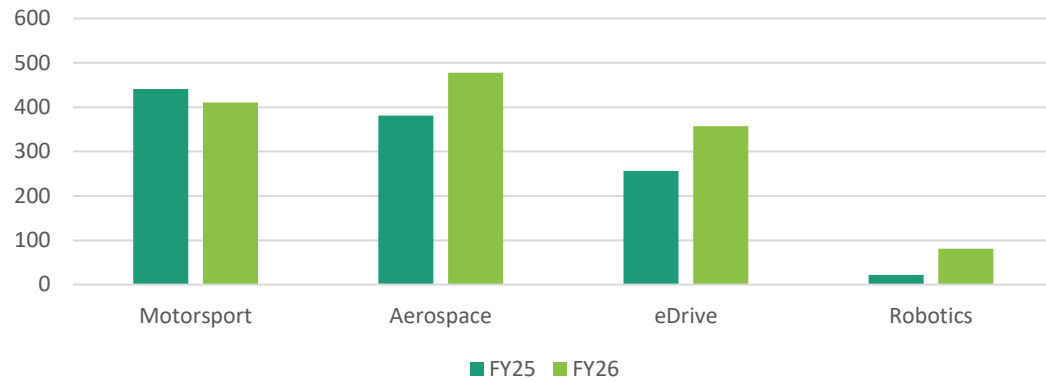
- **Royalty rate** 40% reduction
- **Volume** growth 7%
- **Revenue** down 34%
- **Post-period** new installs up

Financial KPI's	FY26 £m	FY25 £m
Total revenue	£4.63m	£5.55m
Gross margin	88.1%	89.9%
Adjusted* EBITDA	£0.66m	£1.96m
Adjusted* PBT	£0.02m	£1.53m
Operating cash flow	£0.88m	£2.05m
Closing cash balances (gross)	£1.50m	£1.14m

* Adjusted to add back share-based payment charge



**SAWsense - revenue by sector
(£000's)**



Motorsport

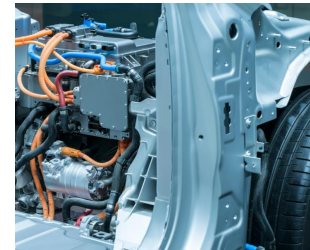
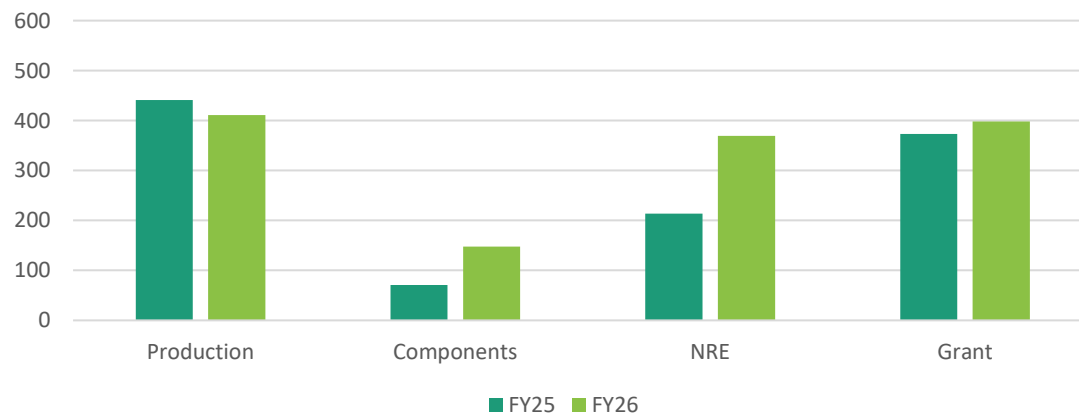
Revenue from production reduced by 7%. Higher volumes from new race series roll-out delayed until 2026/27 season



Aerospace & Defence

Revenue up by 25% - component sales into GE Aerospace progressing well. NRE & grant work for Airbus also strong. Other funded customer programs subject to slow progress

**SAWsense - revenue by type
(£000's)**



eDrive (automotive & leisure)

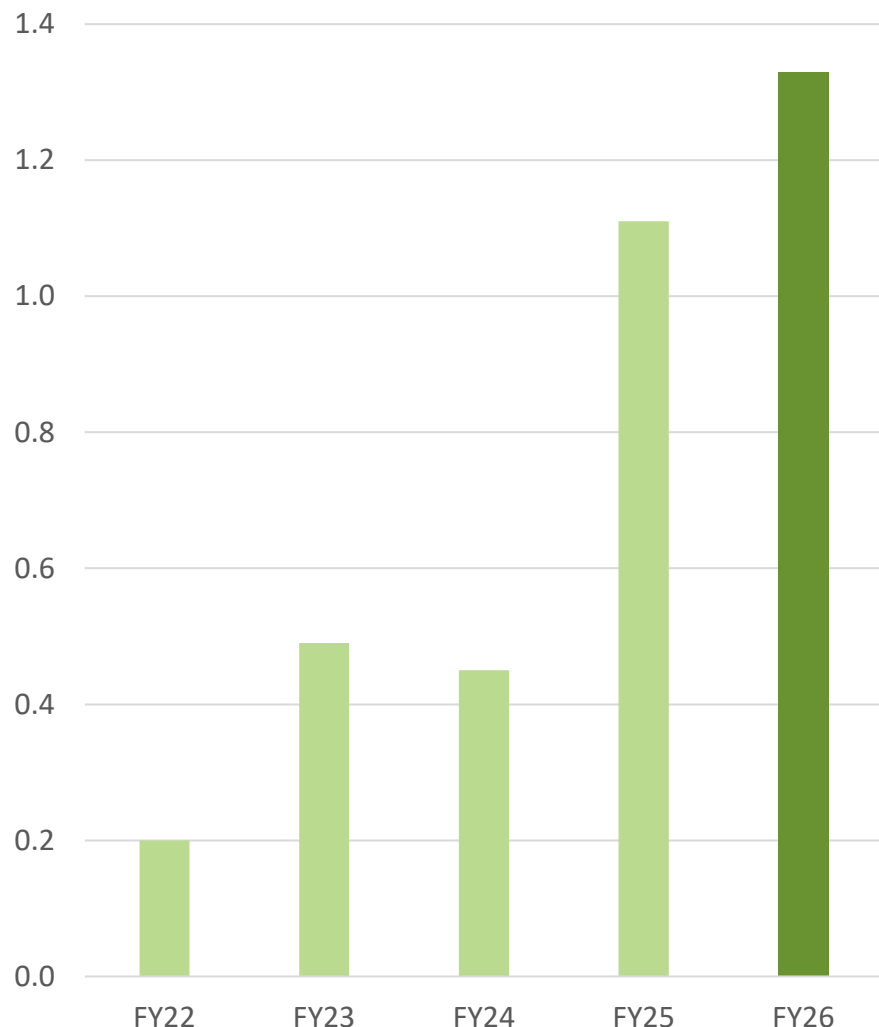
Revenue from NRE & grant funded development projects up by 39%. Cummins Drive35 demo unit due January 2027. Active opportunities in fitness sector with shorter lead times to production



Robotics & Industrial Automation

Revenue from NRE up 268% (from low base). New opportunities and healthy pipeline. Now prototyping and in test with leading actuator providers and OEM's

SAWsense – 5 yr revenue history (£m)



Motorsport - *low volume specials – built at Weston*

Revenue doubled since FY22 JCA with Motion Applied
Scope for continued 2-5x growth in next 3 years from new race series

Aerospace - *low to mid- volume specials – built at Weston or Tier 1*

Ever closer relationship with GE supporting T901 build
Specified on HEAT, RISE – key platforms for GE future
Building relationship with Airbus & others
Scope to 5x revenue from NRE plus component supply

E-Drive & Robotics – *mid- to high volume built by OEM or Tier 1*

Applications use cases proven for e-bikes, robotic joint actuation
Engaged with market leading customers in both sectors
Working towards production by FY28

Incoming shaft
preparation



AQP die bond



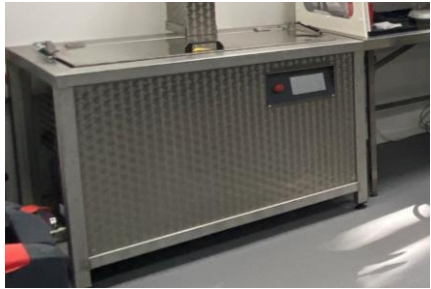
RF Coupler
assembly &
installation



Wire bond
AQP to RF
Coupler



Auto-
Calibration Rig



All key items of equipment installed, commissioned and in use

New process station to simplify shaft cleaning using laser ablation on order

Excellent results from die bonding station - accuracy, speed and repeatability radically improving downstream efficiency

Capacity now available for £5-10m revenue from specialist low- to mid- volume production on pilot line

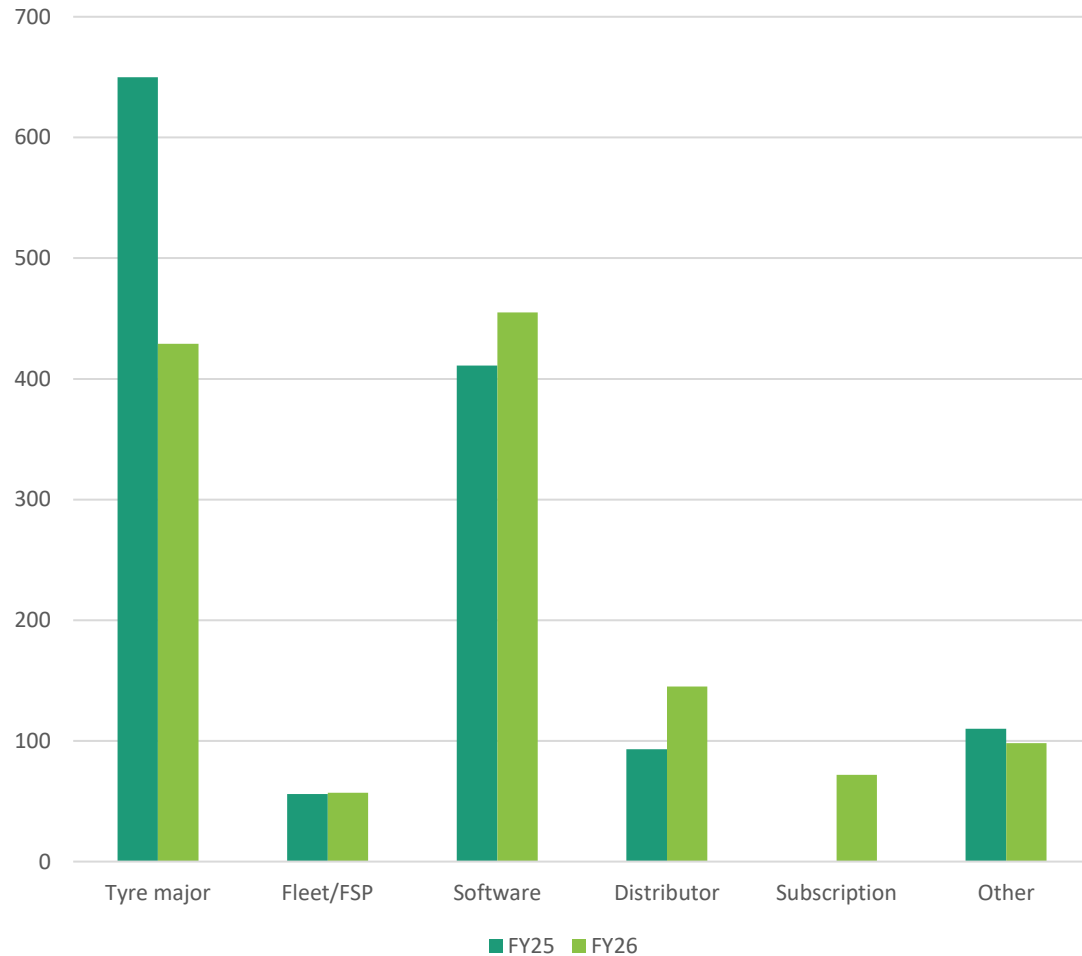
Proof of processes demonstrate ability to replicate in high volume applications on fully automated line

SAWsense - pilot AQP installation line

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Translogik revenue by type
(£000's)



Global tyre majors down by 34%, driven largely by customer-specific commercial challenges. Underlying market fundamentals remain positive, with growth expected from Euro Digital Product Passport regulations & US tariff on low-cost imports. Post year-end, announced a major new agreement with Continental for global roll out

Direct sales to **service centres and fleet operators** initially slow to take off, but first bundled subscription deal underway

Channel partners in **software resale & distribution** deliver revenue growth of 20%

New products launched – smart inflator and OTR variant – prototypes and demo units on test with customers

Alignment with market leading **TPMS providers** offers complementary route to market in FY27



- TLGi - Bluetooth connected, handheld digital tyre inflation tool
- Connects into existing software platforms or new software solutions for remote control via tablet or smartphone and instant data capture
- Fast and accurate tyre inflation data collection linking inflation events to vehicle, wheel position and tyre ID
- Provides instant audit trail of tyre inflation events with useful traceable data

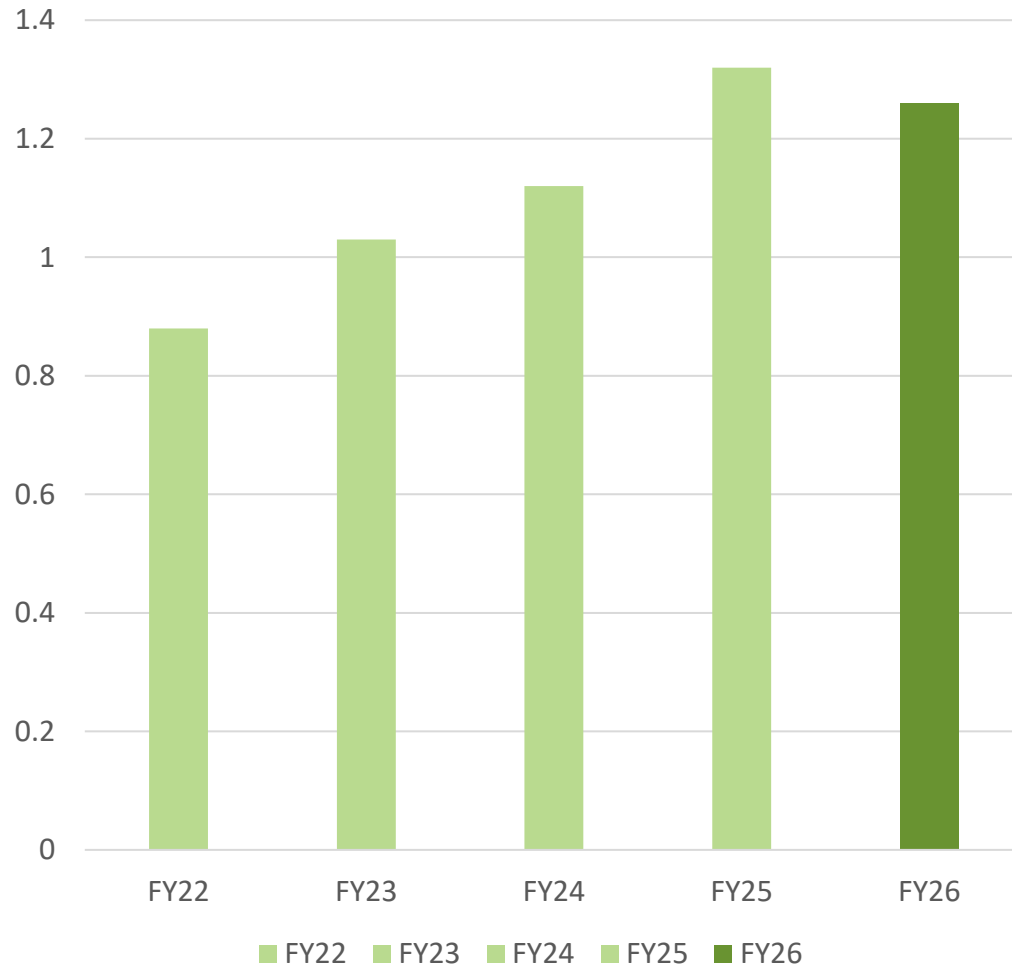


- TLGX HP – higher pressure measurement capability up to 350 psi (24 bar)
- Engineered for durability, accuracy & reliability
- RFID & TPMS capability
- Off road (OTR) version suitable for specialist commercial, off highway and aircraft tyre markets



- New product range upgrade in progress
- Launch planned for FY27Q3
- Watch this space!

Translogik – 5yr revenue
(£000's)



Aim to be recognised as the **industry standard** range of smart tyre monitoring hardware

Closely aligned with **global top 5 commercial tyre manufacturers**

Collaborating with leading **independent TPMS providers**

Increasing proportion of subscription business on **SaaS/HaaS model** for recurring revenue and customer retention

Hardware of choice for software solutions providers, both large and small

Seen as an integral part of the **tyre management ecosystem**

Positioned to capture a **substantial market share** of a fast-growing sector

FINANCIAL SUMMARY



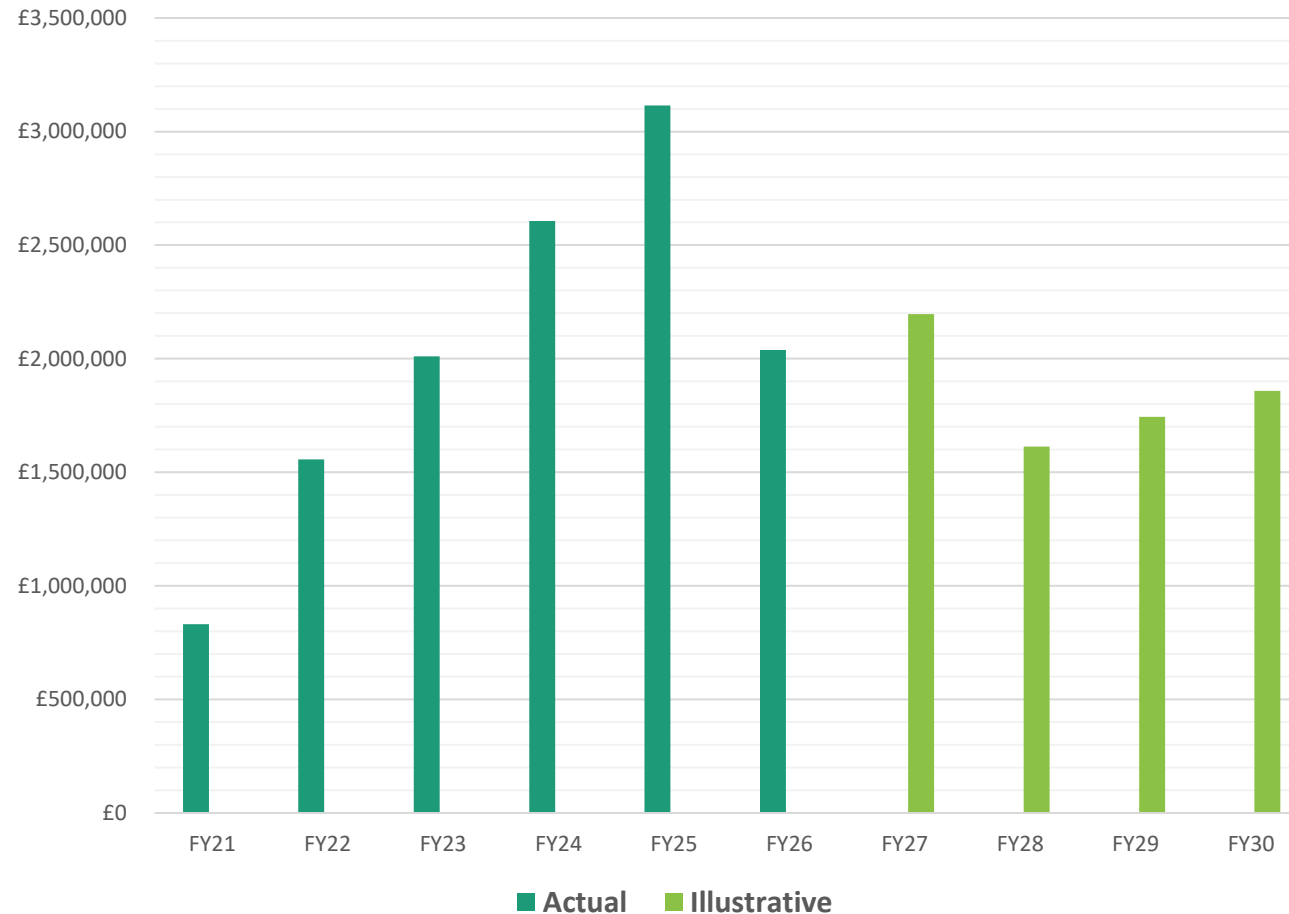
Income statement	FY26 £m	FY25 £m
Total revenue	<u>4.63</u>	<u>5.55</u>
Gross profit <i>Gross margin</i>	4.08 88.1%	4.99 89.9%
Opex	<u>(3.38)</u>	<u>(3.03)</u>
Adjusted* EBITDA	0.66	1.96
Int, depr & amort	<u>(0.64)</u>	<u>(0.43)</u>
Adjusted* PBT	<u>0.02</u>	<u>1.53</u>
Reported PBT	<u>(0.11)</u>	<u>1.41</u>

* Adjusted to add back share-based payment charge

Cash flow statement	FY26 £m	FY25 £m
(Loss)/profit before taxation	(0.11)	1.41
Non-cash costs	0.77	0.55
Working capital movements	<u>0.22</u>	<u>0.09</u>
Cash generated from operations	0.88	2.05
Investment activities	(1.31)	(2.09)
Financing activities	<u>0.79</u>	<u>(0.10)</u>
Net movement in cash	<u>0.36</u>	<u>(0.14)</u>
Closing cash – gross	1.50	1.14
Closing cash – net of asset financing	0.57	1.14

Financial position	FY26 £m	FY25 £m
Tangible fixed assets	1.75	1.55
Intangible fixed assets	2.67	2.11
Deferred taxation asset	<u>1.48</u>	<u>1.48</u>
Non-current assets	5.90	5.14
Net working capital	0.98	1.21
Cash & equivalents*	1.50	1.14
Asset financing*	(0.93)	-
Lease liabilities	<u>(0.31)</u>	<u>(0.37)</u>
Net assets	<u>7.14</u>	<u>7.12</u>
<i>*Net cash after financing</i>	<u>0.57</u>	<u>1.14</u>

iTrack Cumulative Royalties - Actual to FY26 and Illustrative FY27 - FY30



Over fivefold increase in installations since 2020

Unit rate reduced to 60% in FY26 and 40% in FY28, through to expiry at end FY30

Illustration assumes an average incremental increase in monthly truck numbers based on actual average in years 1 to 6

Royalties earned to date £12m – illustration suggests further £7.5m

Growth Targets:	Board continue to set ambitious targets – >25% uplift in FY27
Current trading:	In line with expectations, but some H2 weighting to meet for full year
SAWsense:	Good prospects in motorsport and aerospace for FY27 growth Funded projects underway in volume markets aiming for FY28 production
Translogik:	Underlying “run rate” business uptick over prior year Post year-end customer wins prime for growth in H2 and beyond New products (launched and to be announced) enhance prospects
Bridgestone iTrack:	FY27 at same unit rate as FY26, plus volume growth New business pipeline indicate return to higher growth rate in FY27 Well placed to absorb next unit rate reduction for FY28
Strategy:	Positioning SAWsense & Translogik to offer key enabling technologies in high growth market sectors in an AI adapted world

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