

Excellence in Workforce Management

ATOSS Software SE

Earnings Call Q3 2026 | 23. October 2026 9:30 AM CEST



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ATOSS Software SE 2026

Highlights Q3 2026

CFO Christof Leiber



Key takeaways

Q3 2026

1

Solid Q3 2026 leading to continued strong margin development for Q1 – Q3 2026:

- Topline growth of 12% YoY, driven by 26% Cloud growth for Q1 – Q3 2026
- EBIT margin remains above guidance, expanding to 37% for Q1 – Q3 2026

2

Solid order development year-to-date:

- Strong ARR growth and continued Cloud & Subscription momentum
- New ACV Q1-Q3 2026 slightly above prior-year level

3

Recent corporate developments:

- Planned leadership transition progressing fully on track

4

Outlook 2026:

- Continued double-digit revenue growth
- 2026 Revenue projection: €210m–€215m, higher probability of lower end
- 2026 EBIT Margin projection: Uplift of EBIT margin to around 37%

Income statement (IFRS)

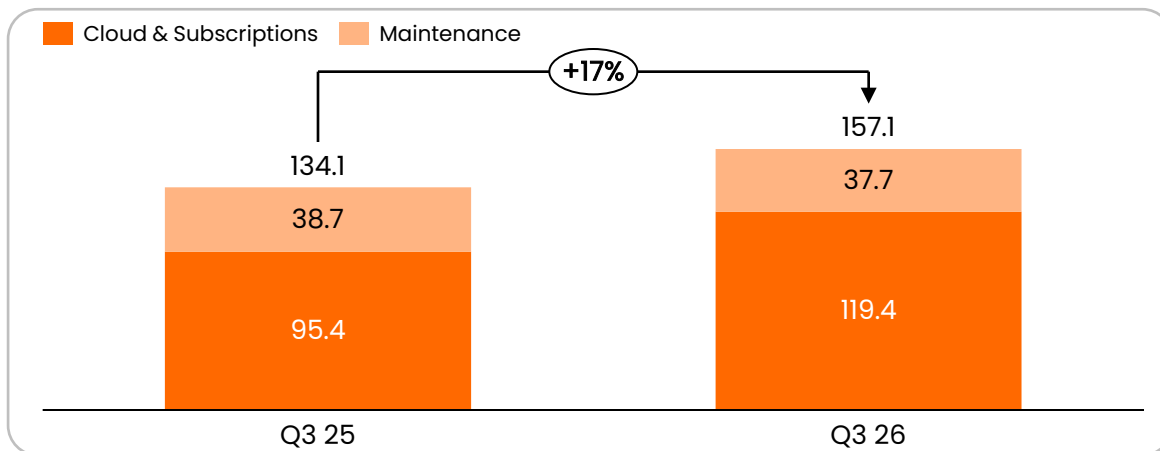
Q3 2026 vs. Q3 2025

EURk ¹	Q1-Q3 2026	% of total revenue	Q1-Q3 2025	% of total revenue	YoY %
Total revenue	155,802	100%	139,327	100%	12%
Software	117,490	75%	103,178	74%	14%
Cloud & Subscriptions	85,195	55%	67,552	48%	26%
Maintenance	28,581	18%	29,580	21%	-3%
Licenses	3,715	2%	6,046	4%	-39%
Consulting	31,186	20%	29,576	21%	5%
Hardware	3,220	2%	2,833	2%	14%
Others	3,906	3%	3,741	3%	4%
EBITDA	60,886	39%	51,683	37%	18%
EBIT	57,292	37%	48,167	35%	19%
EBT	58,049	37%	50,498	36%	15%
Net profit	38,963	25%	34,056	24%	14%
EPS in euro	2.45		2.14		14%

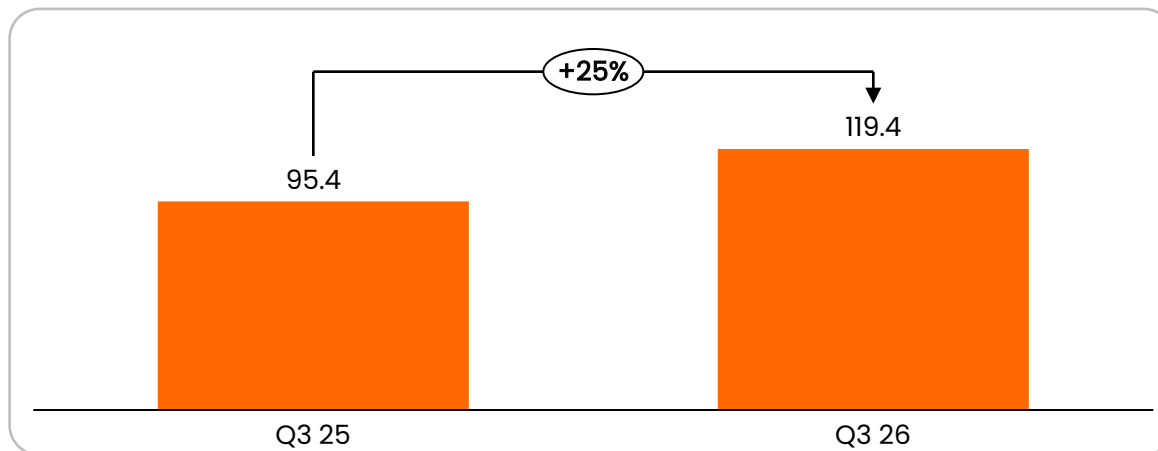
1. Figures may not sum exactly due to rounding differences

Strong development of recurring revenue driven by Cloud & Subscriptions

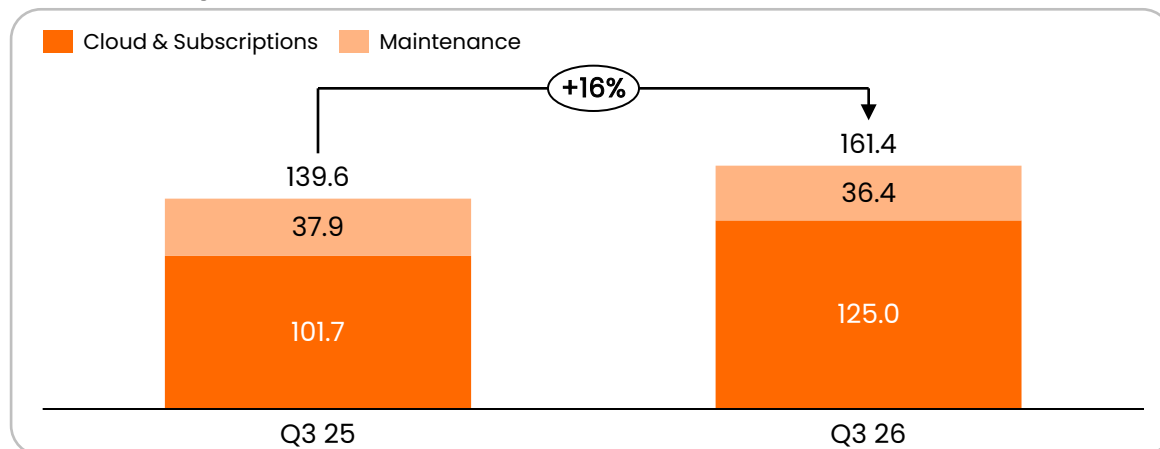
ARR Total (Cloud & Subscriptions + Maintenance) in EURm



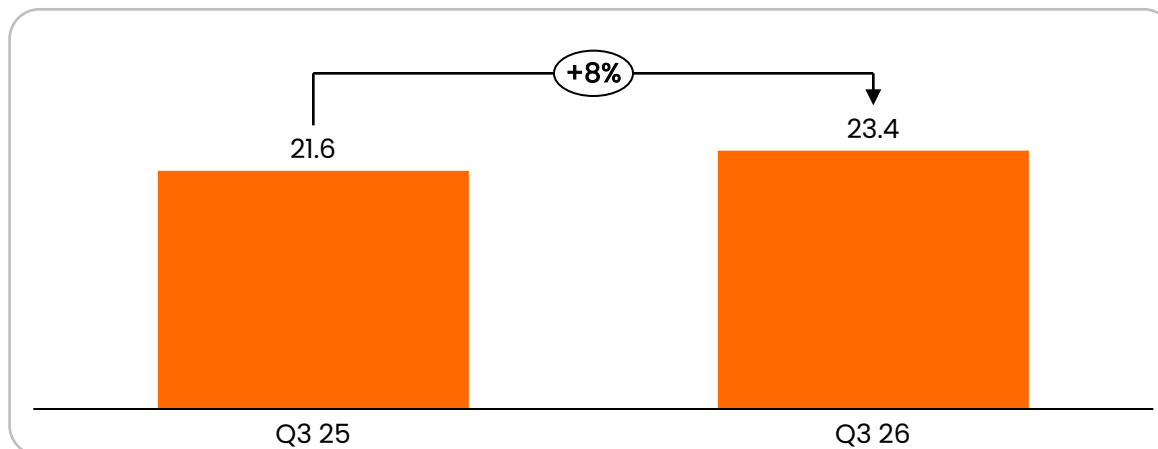
ARR Cloud & Subscriptions in EURm



ARR backlog Total (12 months)¹ in EURm



Cloud & Subscription backlog growth (YoY)² in EURm



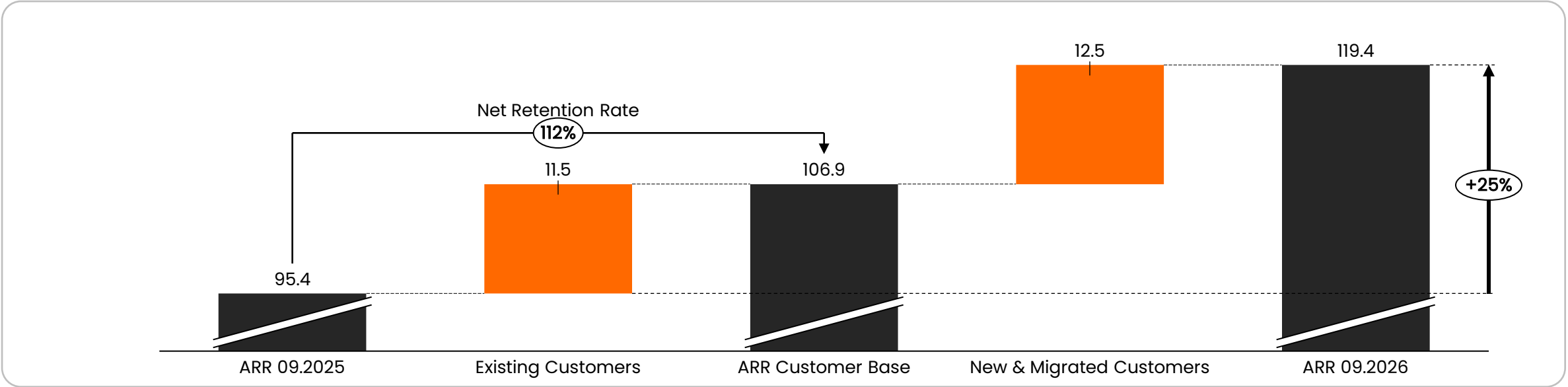
1. ARR backlog Total (12 months) = Total ARR + contractually committed additions, expansions and churn for the next 12 months

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

Q3 2026

Cloud & Subscriptions ARR¹ in EURm



		GRR ²	NRR ³			
ASES	70.0	93.9%	11.2 116.0%	81.1	7.1	88.3
ATC	16.9	95.1%	1.0 106.1%	18.0	2.4	20.3
Crewmeister	8.5	79.6%	-0.7 91.7%	7.8	3.0	10.8

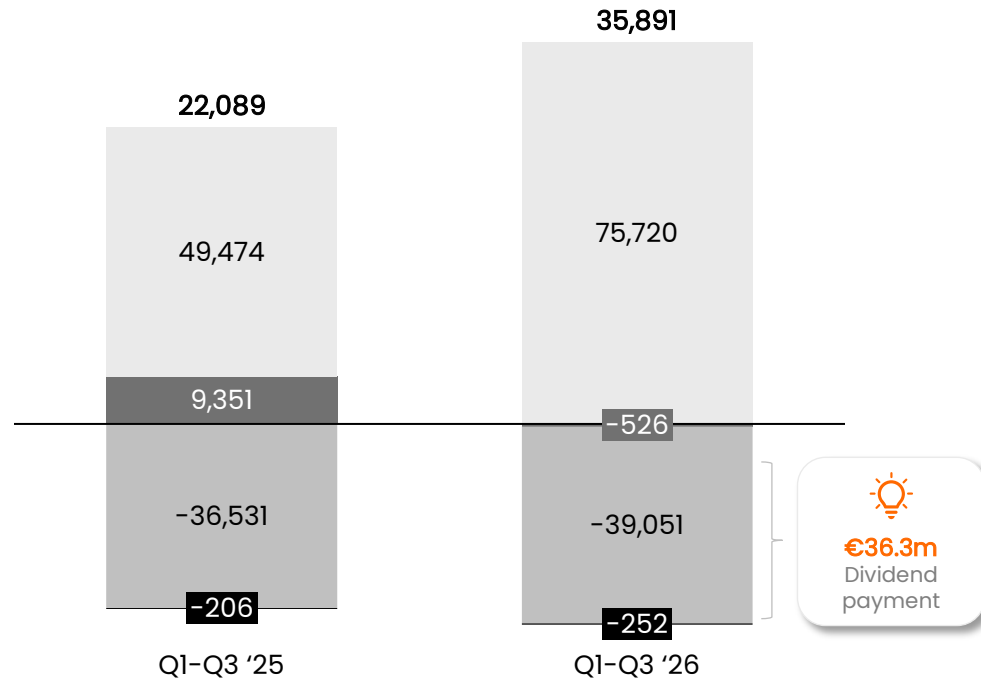
1. ARR (Annual Recurring Revenue) comprises the turnover generated by the company over the next 12 months on the basis of current monthly cloud usage fees applicable as of the qualifying date
 2. Gross Retention Rate: Percentage of existing customers or revenue retained over the last 12 months, excluding 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

Q1-Q3 2026

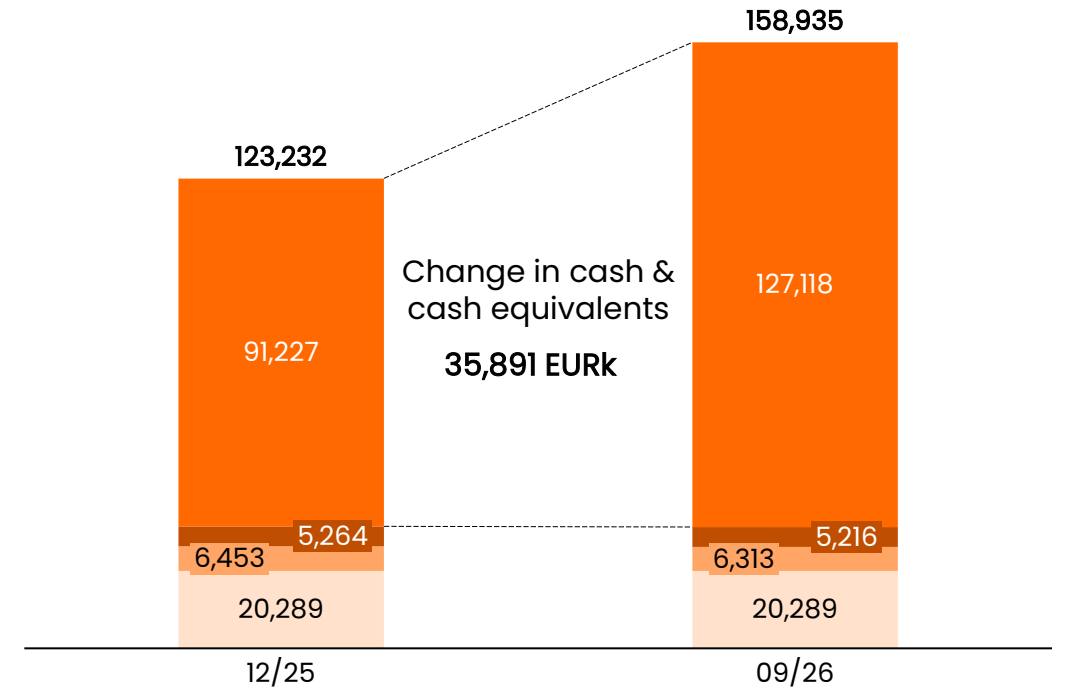
Cash flow in EURk

Operating activities
 Financial activities
 Investment activities
 Exchange rates



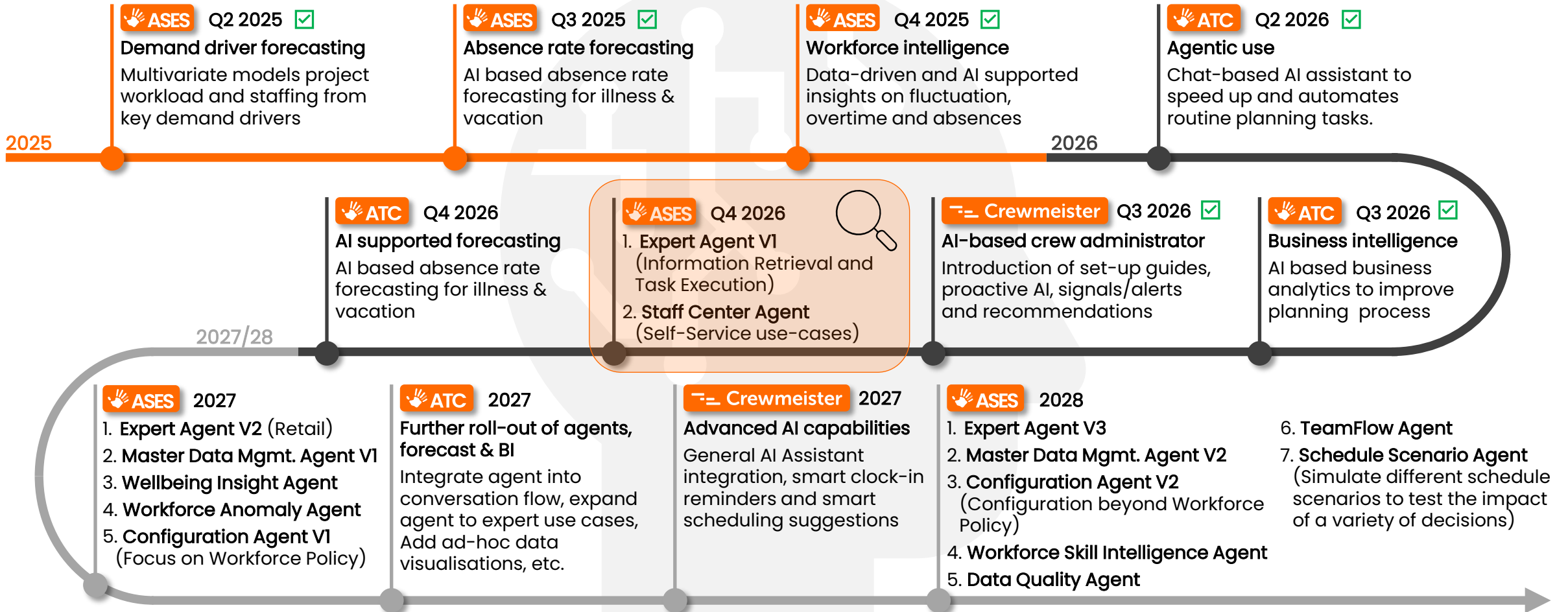
Liquidity in EURk

Cash & cash equivalents
 Gold
 Investment funds
 Fix. Long-term deposits



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.

Expert Agent user experience

Use case: Approve leave requests in bulk

WFI Agent · Demo

Topics > Approve leave requests in bulk

Topics

< Back to: Request leave

Next: Shift swap >

Approve leave requests in bulk

Release 2026

THE SITUATION TODAY

Thomas has 6 open leave requests for June to August. Today he opens each request individually and checks the team calendar to see who else is away during that period. For every rejection he also writes a comment.

TW

Thomas Weber
Team lead, 10 employees

WHAT THE AGENT DOES

- Groups open requests **by risk to staffing**.
- Calculates **what an approval means for coverage**.
- Writes rejection comments and **notifies everyone affected**.
- Nothing happens **until the manager confirms**.

All people and data are sample data. Esc: back to the overview.

WFI Agent

Review my team's open leave requests

4 steps completed

I found **6 open leave requests** for your team. I checked each one for its impact on staffing and **grouped them by risk**:

Risk groups

High risk

Critical understaffing on peak days

01 request

Medium risk

Staffing at the minimum level

02 requests

Safe

Sufficient staffing ensured

03 requests

I'll approve all low-risk requests

Understood, the **3 low-risk requests** are marked for approval. You'll confirm everything together at the end. Here are the **2 medium-risk requests** that need your attention:

Leave requests, medium risk

Summary	AI note
Julian Schmidt 14-16 Jul (3 days)	⚠ Staffing 70%, exactly at the minimum if both are approved
Lucas Lesch 14-17 Jul (4 days)	⚠ Staffing 70%, exactly at the minimum if both are approved

Or ask something else

+

↑

AI can make mistakes.

Q&A session



Appendix

Cash Flow Statement (IFRS)

Operating activities

EURK ¹	Q1-Q3 2026	Q1-Q3 2025
Earnings before taxes	58,049	50,498
Depreciation	3,594	3,516
Financial income	-1,445	-2,835
Financial expenses	689	504
Non-cash personnel expenses	3,460	820
Payouts from share-based remuneration	-1,559	0
Change in net current assets		
Trade receivables	-4,142	-4,643
Other current non-financial assets	-1,269	-459
Capitalized contract costs	31	-2,147
Other assets	-131	-117
Trade accounts payable	-1,870	-382
Other current financial and non-financial liabilities ²	-12	1,575
Other current and non-current provisions	-2,033	617
Other non-current financial liabilities ²	-1,035	1,214
Contractual liabilities	28,960	25,983
Interest received	1,108	1,326
Interest paid	-1	-1
Income taxes received	120	107
Income taxes paid	-6,793	-26,102
Cash flow generated from operating activities (1)	75,720	49,474

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

Cash Flow Statement (IFRS)

Investment and financing activities

EURk ¹	Q1-Q3 2026	Q1-Q3 2025
Cash flow from investment activities		
Expenditure for the purchase of tangible and intangible assets	-526	-649
Proceeds from the disposal of financial assets	0	10,000
Cash flow generated from investment activities (2)	-526	9,351
Cash flow from financing activities		
Redemption element leasing liabilities IFRS 16	-2,665	-2,549
Interest element leasing liabilities IFRS 16	-120	-101
Dividends paid	-36,266	-33,880
Cash flow generated from financing activities (3)	-39,051	-36,531
Changes in cash and cash equivalents - total (1) - (3)	36,143	22,295
Cash and cash equivalents at the beginning of the period	91,227	82,667
Effects of exchange rate changes on cash and cash equivalents	-252	-206
Cash and cash equivalents at the end of the period	127,118	104,756

1. Figures may not sum exactly due to rounding differences

Balance Sheet (IFRS)

Assets

EURk ¹	September 30, 2026	December 31, 2025
Non-current assets		
Intangible assets	69	114
Property, plant and equipment	3,529	3,898
Rights of use	11,540	6,377
Capitalized contract costs	11,418	11,449
Other non-current financial assets and precious metals	2,226	2,231
Total non-current assets	28,783	24,069
Current assets		
Trade receivables	15,102	10,960
Other current financial assets and precious metals	30,153	30,302
Other current non-financial assets	5,071	3,594
Cash and cash equivalents	127,118	91,227
Total current assets	177,445	136,083
Total assets	206,228	160,152

1. Figures may not sum exactly due to rounding differences

Balance Sheet (IFRS)

Equity and Liabilities

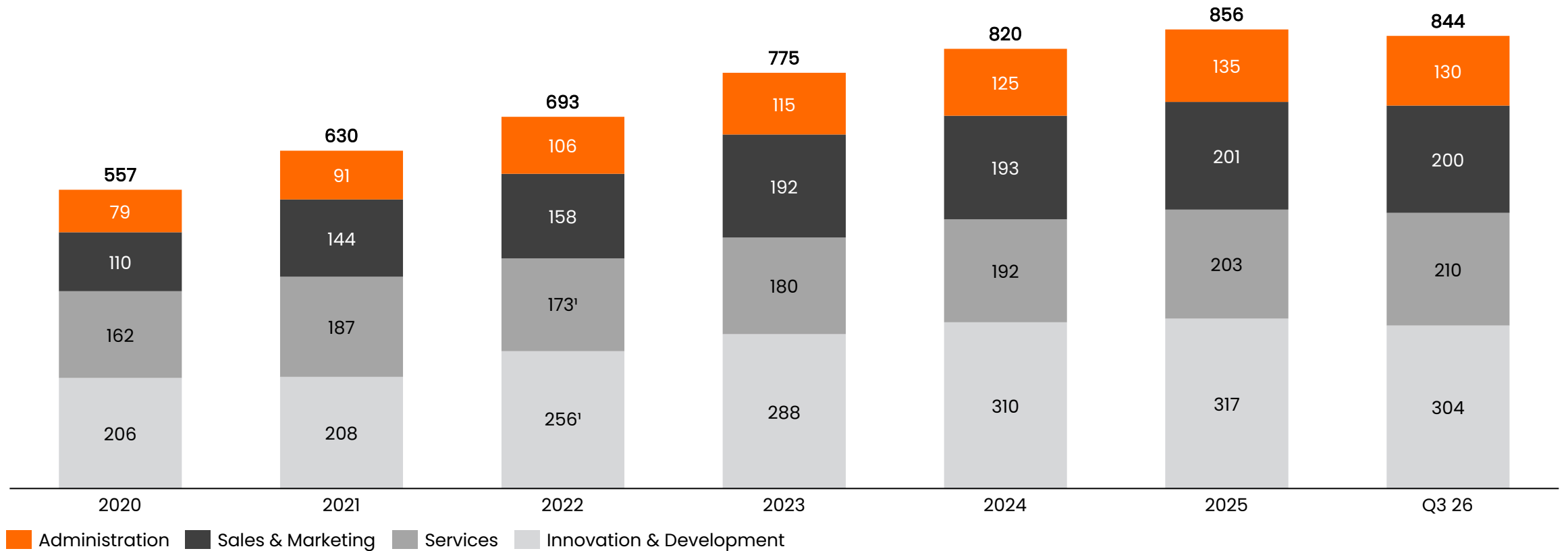
EURk ¹	September 30, 2026	December 31, 2025
Equity		
Subscribed capital	15,906	15,906
Capital reserve	3,949	2,048
Equity deriving from unrealized profits/losses	1,286	1,286
Unappropriated net income	80,609	77,912
Equity attributable to the equity holders of the parent company	101,750	97,153
Non-controlling interests	-109	-109
Total Equity	101,641	97,044
Non-current liabilities		
Pension provisions	1,022	993
Other non-current provisions	1,314	670
Other non-current financial liabilities	3,328	4,363
Non-current lease liabilities	8,950	3,676
Deferred tax liabilities	3,326	3,907
Total non-current liabilities	17,940	13,608
Current liabilities		
Trade accounts payable	716	2,586
Contractual liabilities	32,261	3,300
Current lease liabilities	2,965	3,159
Other current financial liabilities	6,421	6,105
Other current non-financial liabilities	17,540	17,795
Tax liabilities	26,468	13,601
Other provisions	277	2,954
Total current liabilities	86,647	49,501
Total equity and liabilities	206,228	160,152

1. Figures may not sum exactly due to rounding differences

People & Organization update

Q3 2026

Personnel development (headcount)



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