

Spir Group ASA – Q3 2024

CEO Per Haakon Lomsdalen & CFO Cecilie Brænd Hekneby

13 November 2024

Q3 highlights: Growth and improved profitability

SOLID ARR GROWTH

425

MNOK ARR
(up 10% from September 2023)



STEADY REVENUE GROWTH

282

MNOK REVENUE IN Q3 2024
(up 7% from Q3 2023)



INCREASING GROSS PROFIT

169

MNOK GROSS PROFIT IN Q3 2024
(up 9% from Q3 2023)



INCREASING ADJUSTED EBITDA¹


59

MNOK ADJ EBITDA IN Q3 2024
(up 14% from Q3 2023)



¹Adjusted for restructuring- and integration costs - MNOK 3.3 in Q3 24 (MNOK 3.1 in Q3 23) and MNOK 7.7 YTD 24 (MNOK 14.7 YTD 23)

Strengthening the real estate business area by acquiring the remaining shares in Unbolt AS



New product offering

Spir Group now has a more complete product offering within real estate




Insights and analytics

Unbolt with subsidiaries has built a Nordic ecosystem around property condition data


About Unbolt AS

- The market leading software and data provider for appraisers in Norway
- Controlling 60 percent of iVerdi AS, a software company software at the forefront of the appraisal and real estate industry
- iVerdi has developed a state-of-the-art professional system used by most appraisal firms in Norway and by real estate agents to reach a broad network of appraisers, playing central role in the processing of more than 80% of all real estate sales in Norway



iVerdi AS

Unbolt through its subsidiary Iverdi provides software and analysis utilized by the majority of real estate-appraisers across Norway and ARR of NOK 11m



Growth opportunities

There are multiple areas of synergies between Unbolt and Spir Group through bundling opportunities and common data platform

Unbolt AS in numbers (MNOK)	YTD 2024	YTD 2023	Growth	%
Total revenue*	32	29	3	10%
Total EBITDA	5	5	0	0%
CAPEX	19	14	5	36%
FTEs	22	16	6	38%

*Iverdi AS, owned 60/40 by Unbolt AS and Norsk Takst, respectively, contributing with ~90% of Unbolt's total revenues



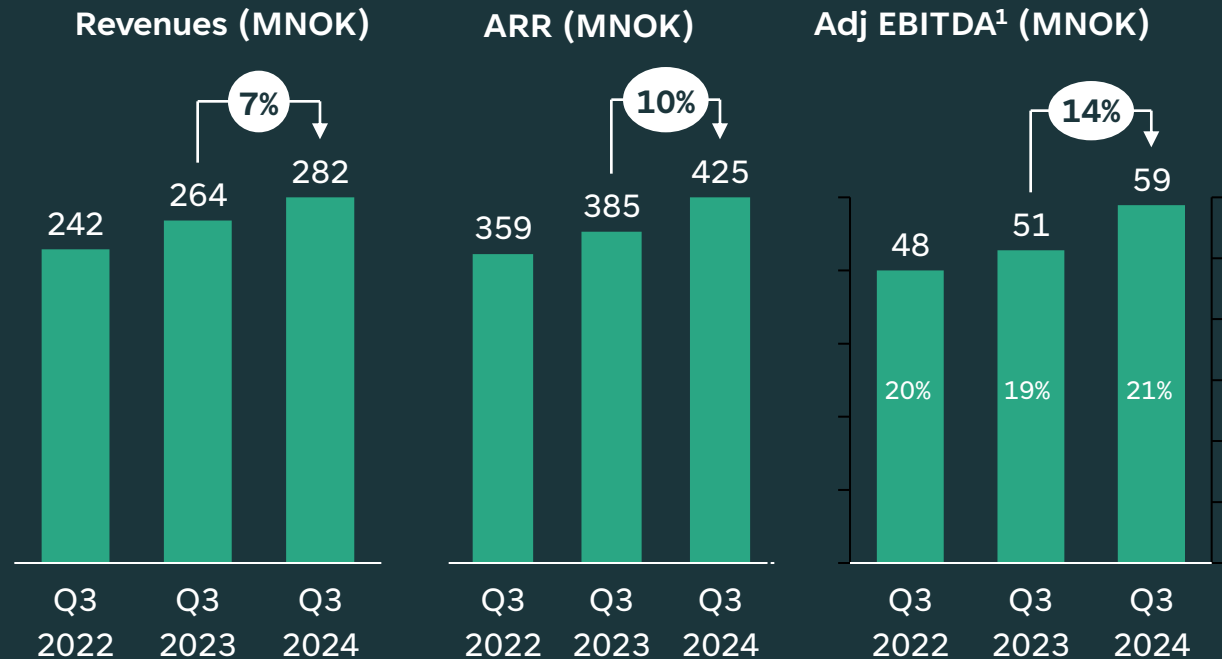
Financial Review

Q3 2024

Highlights Q3 2024

Strong quarter with increasing revenues and double-digit EBITDA growth

- Acquisition of the remaining shares in Unbolt AS on 23 August impacts the consolidated results in Q3 2024 with one month
- Revenue of MNOK 282 up 7% percent from MNOK 264 in Q3 2023.
- Annual recurring revenue (ARR) increased to MNOK 425 at the end of Q3 2024, up 10 percent from Q3 2023
- Adj EBITDA¹ of MNOK 59 up 14% from MNOK 51 in Q3 2023 with adj EBITDA-margin of 21%
- Net finance of MNOK 20, compared to MNOK -13 in Q3 2023, includes one-off financial gain from the consolidation of Unbolt AS
- Net income of MNOK 40 up from MNOK 6 in Q3 2023

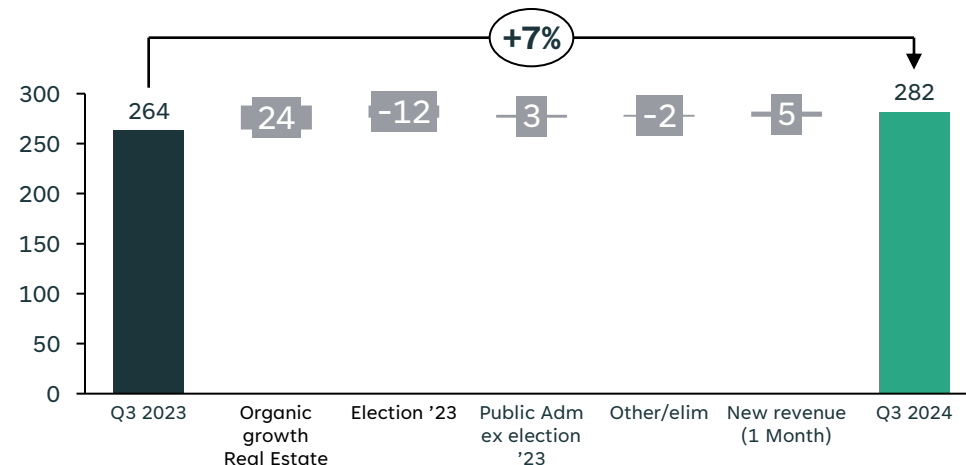


¹Adjusted for restructuring- and integration costs - MNOK 3.3 in Q3 24 (MNOK 3.1 in Q3 23) and MNOK 7.7 YTD 24 (MNOK 14.7 YTD 23)

Strong development in real-estate drives revenue-growth

NOK MILLION	Q3 2024	Q3 2023	Growth	%	
Real Estate	217	188	28	15 %	
<i>Ambita</i>	127	115	12	10 %	
<i>Boligmappa</i>	14	11	3	29 %	
<i>Metria</i>	72	62	10	16 %	
<i>Iverdi</i>	4	-	4	<i>n.a.</i>	
Public Administration	63	73	-	9	-13 %
<i>Sikri</i>	63	73	-	9	-13 %
Other/elimination	2	3	-	1	-32 %
Overall revenue	282	264	18	7 %	
Gross profit	169	155	13	9 %	
Gross margin	60 %	59 %	1.0 pts		

- 15% growth in the real estate business area with double-digit revenue growth in Ambita, Boligmappa and Metria
- Strong growth in the Norwegian real estate market and market recovery in Sweden
- Boligmappa continues its growth journey with 29% increase from Q3 2023
- iVerdi consolidated with one month in Q3 2024 adds revenue of MNOK 4 to the real estate business area
- Within Public Administration Sikri has steady growth of 4% adjusted for revenue in Q3 2023 of MNOK 12 related to biannual election
- Other revenue/elimination includes 1 month revenue from Unbolt (ex iVerdi) of MNOK 0.4
- Gross-margin is up 1 pts compared to last year

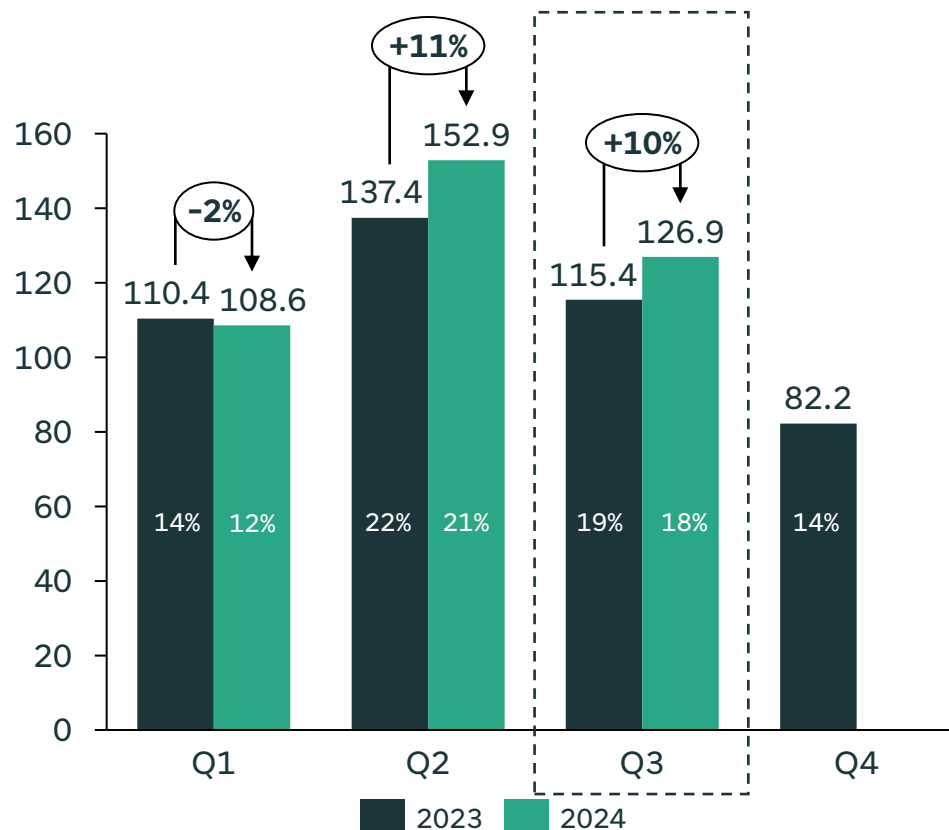


10% revenue growth in a strong real estate market

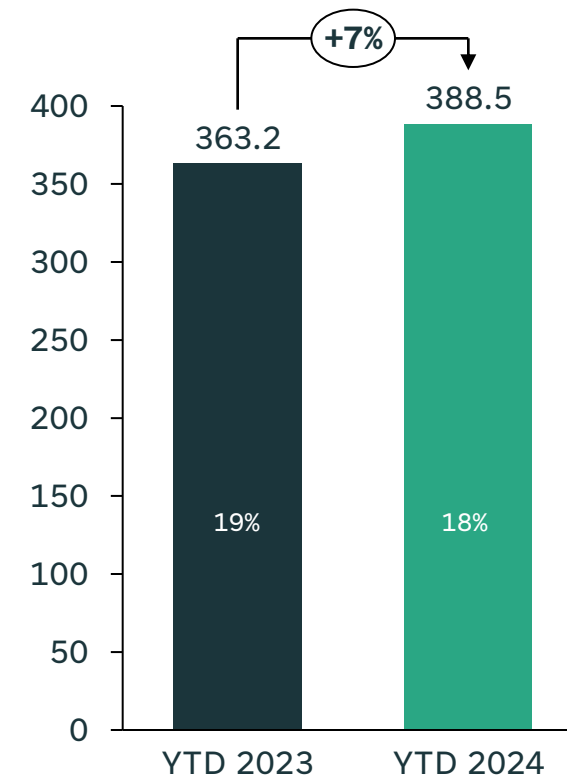
Main developments

- Revenue up 10% to MNOK 127 in Q3 2024
- Transaction-based revenue up 12% to MNOK 116 in the quarter following strong development in the Norwegian real estate market. Properties put out for sale up by 3% in Q3 2024
- Commencement of new homes up by 7% compared to Q3 2023, and revenue from Byggesøknaden up 27% as an increasing number of municipalities require digital building applications
- Operational costs impacted by annual salary increases, inflation and increased sales & marketing activities
- Adj EBITDA¹ of MNOK 22 in Q3 2024 with 18% EBITDA-margin
- Revenue up 7% YTD to MNOK 389 with adj EBITDA of MNOK 68

Q3 Revenue (MNOK) and adj EBITDA margin¹



YTD Revenue (MNOK) and adj EBITDA margin¹



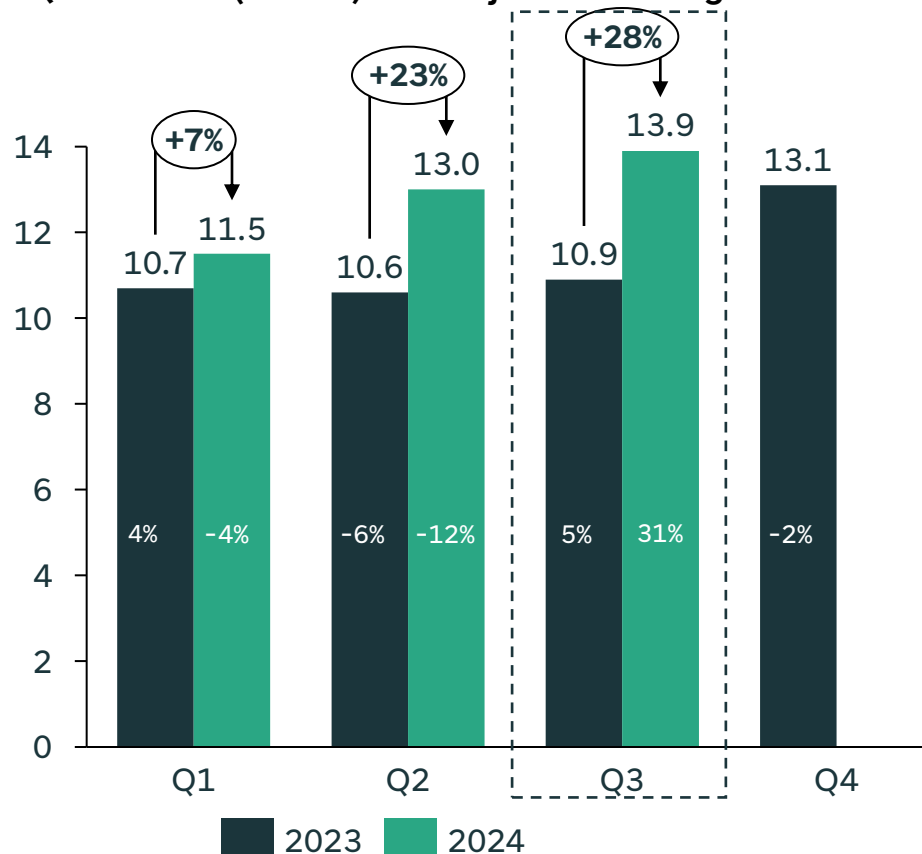
1) Adjusted for restructuring costs – MNOK 1.2 in Q3 2024 and YTD 2024 (no adjustments YTD 2023)

28% revenue growth and increasing profitability

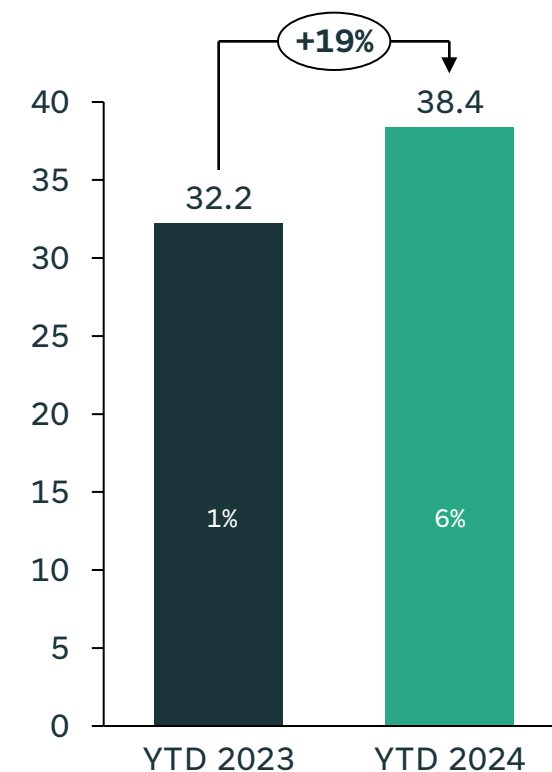
Main developments

- Revenue up 28% to MNOK 14 in Q3 2024
- Subscription revenue up 25% to MNOK 13 with ARR growth of 24% to MNOK 52
- Other income decreased by MNOK 0.6 related to grants received in 2023 from Forskningsrådet (the Research Council of Norway) substantially reduced in 2024 according to plan
- Gross profit up 27% to MNOK 14 with 98% gross margin
- Adj EBITDA¹ of MNOK 4.3 up from MNOK 0.6 one year earlier
- Revenue up 19% YTD to MNOK 38 with adj EBITDA of MNOK 3 and increasing adj EBITDA-margin
- New CEO from August 2024

Q3 Revenue (MNOK) and adj EBITDA margin¹



YTD Revenue (MNOK) and adj EBITDA margin¹



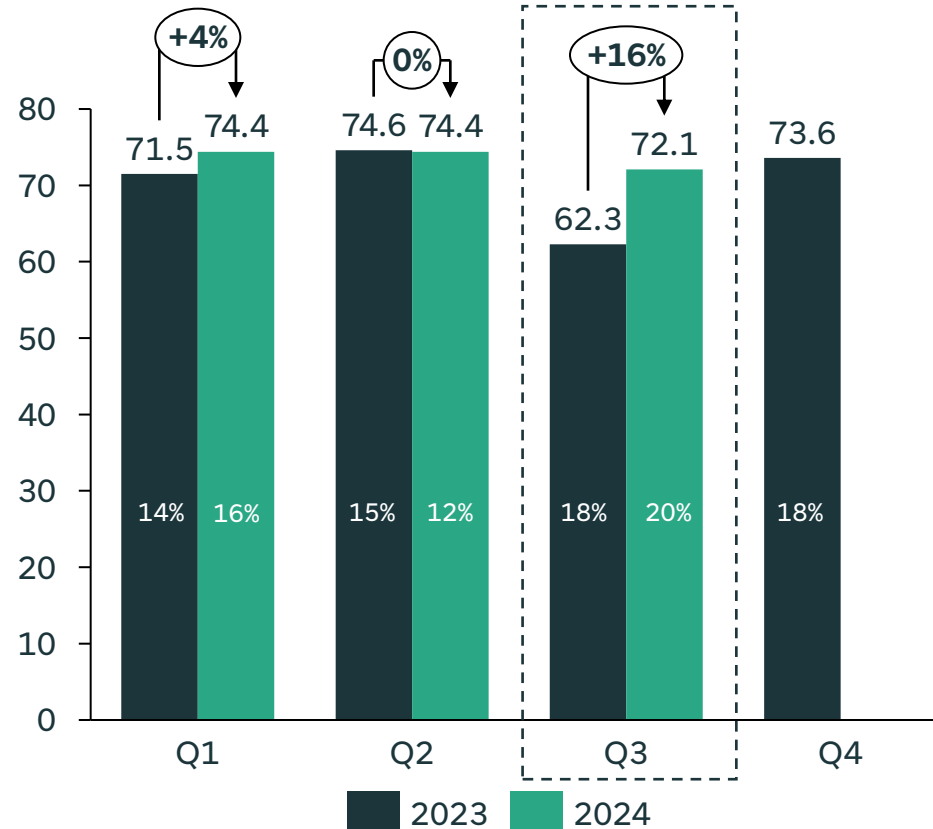
1) Adjusted for restructuring costs – MNOK 0.4 YTD 2024 (no adjustments in Q3 2024, Q3 2023 or YTD 2023)

16% revenue growth and increased profitability

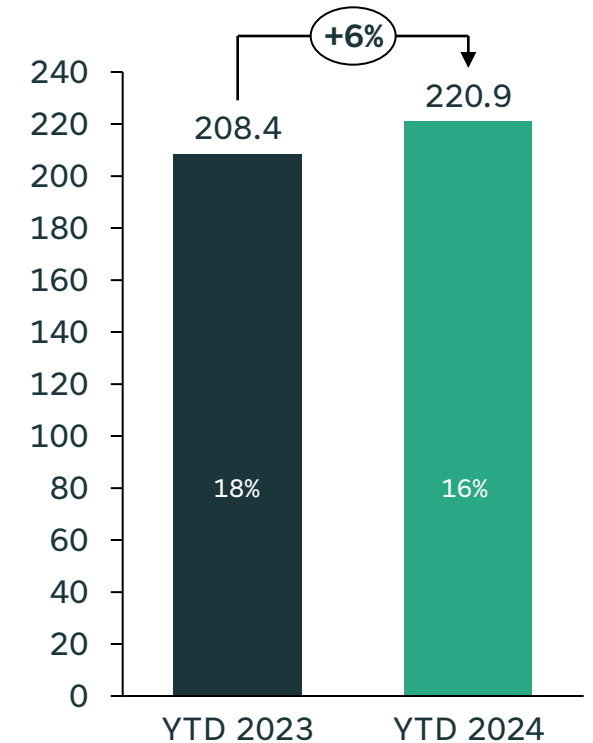
Main developments

- 8% growth in Saas-products like Metria Maps and Metria Markkoll – ARR of MNOK 117
- Positive signs of market recovery in the Swedish real estate market and 7% growth in transaction-based revenues to MNOK 22
- High demand for consulting services with revenue up MNOK 5 to MNOK 17
- Gross profit up 14% to MNOK 44 gross margin of 60%
- Increased profitability with adj EBITDA¹ of MNOK 15 and adj EBITDA-margin up from 18% in Q3 2023 to 20% in Q3 2024 following increased gross profit and cost initiatives starting to show results
- Revenue up 6% YTD to MNOK 221 with adjusted EBITDA of MNOK 35

Q3 Revenue (MNOK) and adj. EBITDA margin¹



YTD Revenue (MNOK) and adj. EBITDA margin¹



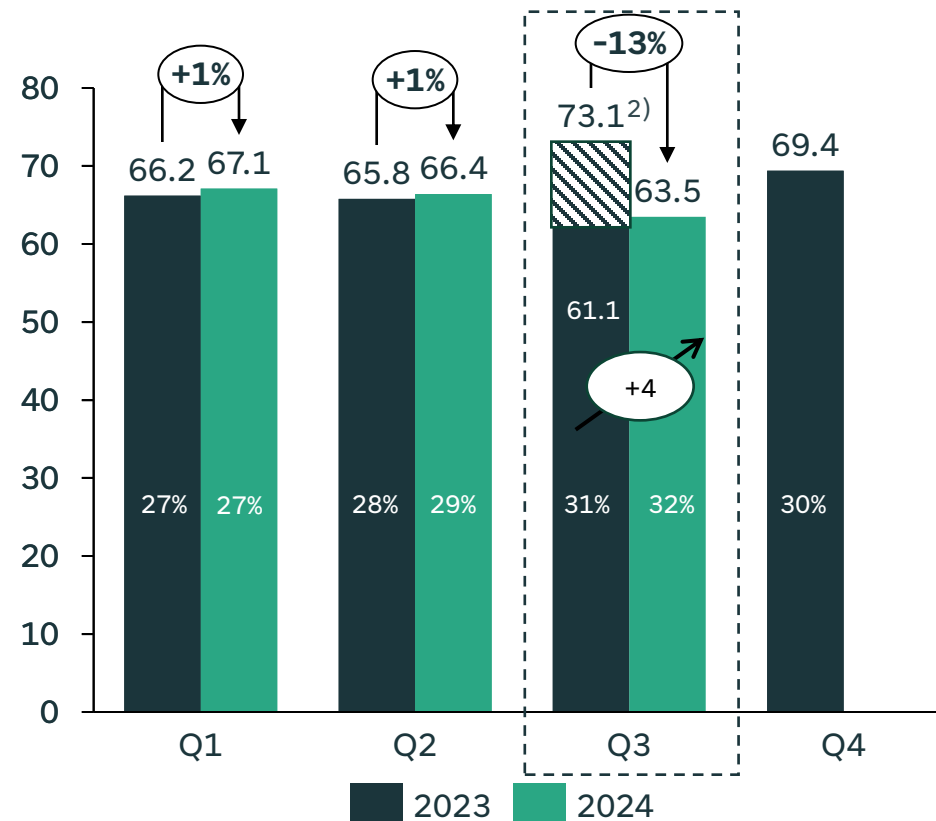
1) Adjusted for restructuring- and integration costs - MNOK -0.8 in Q3 24 (MNOK 1.8 in Q3 23) and MNOK 2.3 YTD 24 (MNOK 7.7 YTD 23)

Subscription revenue up 6%, steady ARR-growth and increased profitability

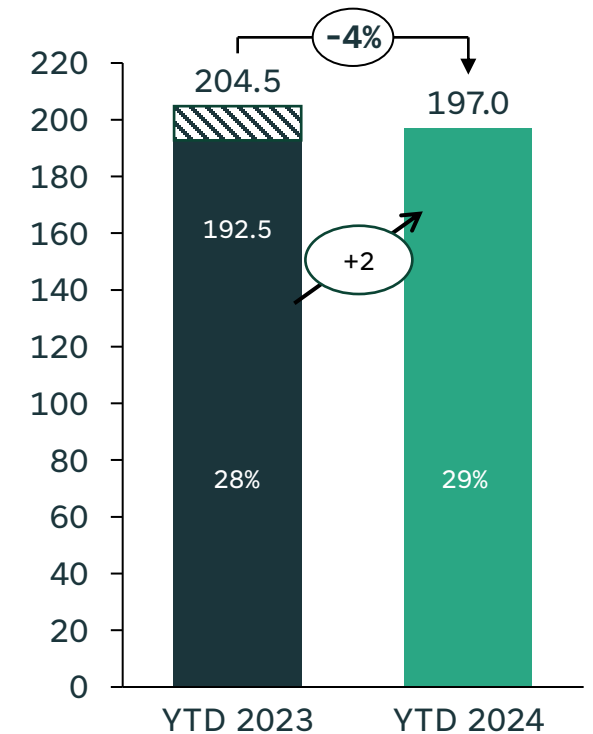
Main developments

- Underlying revenue up 4% to MNOK 64 in Q3 2024 when adjusting for bi-annual election revenue of MNOK 12 in Q3 2023
- Subscription revenue up 6% in the quarter to MNOK 50 following steady ARR growth of 4% to MNOK 204
- Fewer upgrade projects as the majority of customers are migrated to cloud gives lower consulting revenue and lower COGS
- Stable gross profit of MNOK 56 despite lower revenue
- Adjusted EBITDA¹ of MNOK 20 with 32% adj EBITDA-margin
- Revenue up 2% YTD when excluding biannual revenue from election in Q3 . Adjusted EBITDA of MNOK 58 with 29% adj EBITDA-margin

Q3 Revenue (MNOK) and adj. EBITDA margin¹



YTD Revenue (MNOK) and adj. EBITDA margin¹



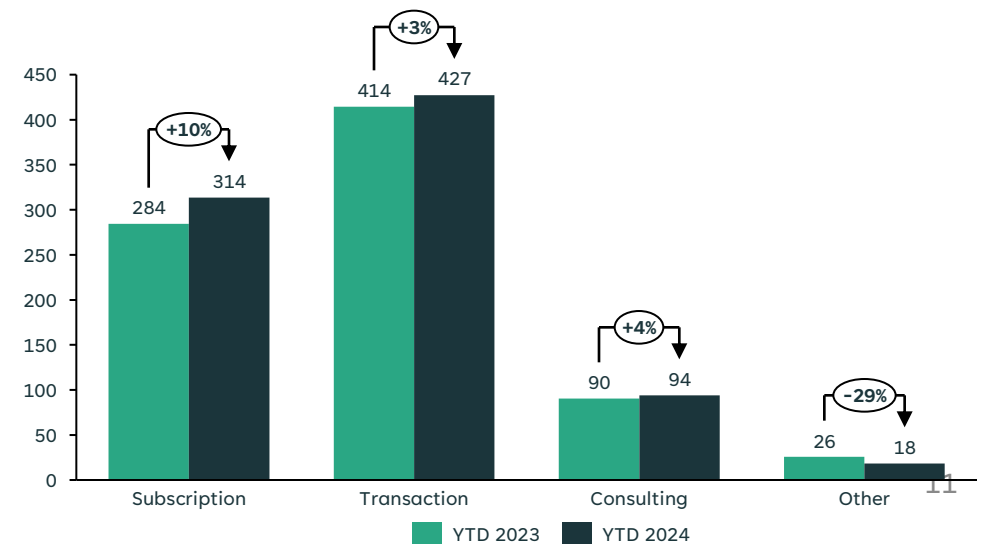
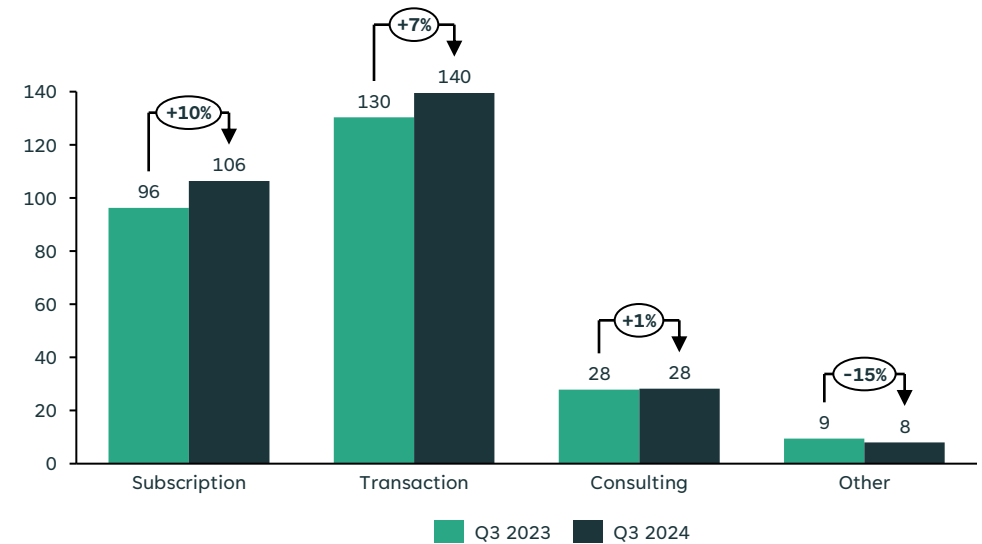
1) Adjusted for restructuring costs – MNOK 0.8 in Q3 24 (MNOK 0.7 in Q3 23) and MNOK 1.0 YTD 24 (MNOK 2.7 in YTD 23)

2) Includes semiannual Election project – MNOK 12

Q3 2024 - FINANCIAL REVIEW

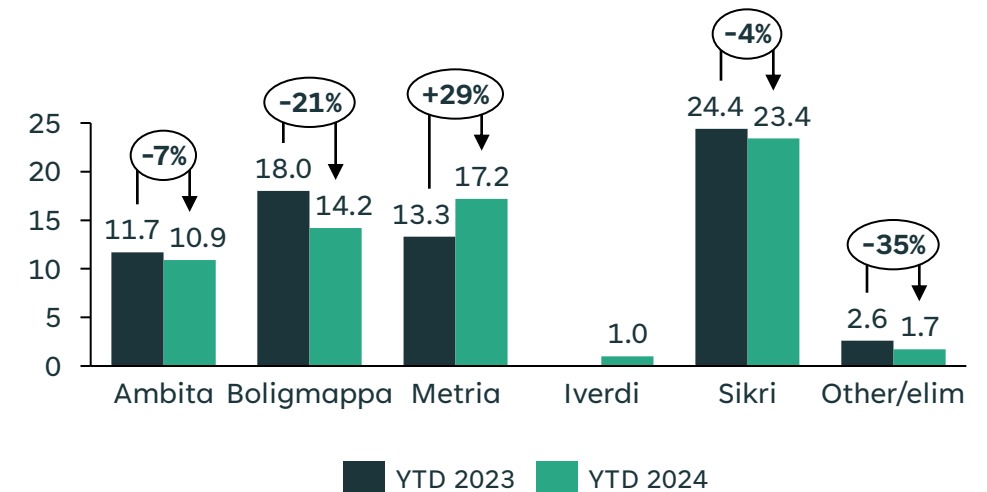
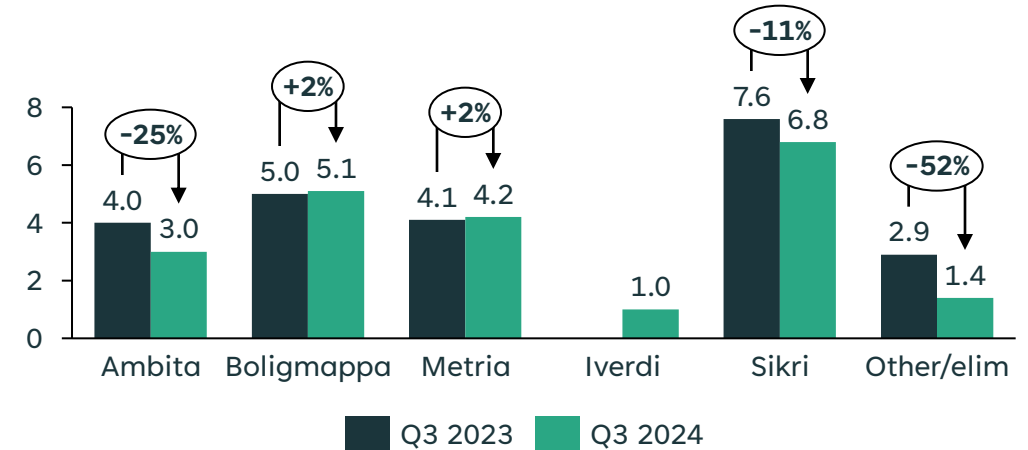
Scalable revenue growth

- Total revenue up 7% to NOK 282 million in the quarter and up 5% to MNOK 853 YTD
- Subscription +10% following steady ARR-development across the companies both in the quarter and YTD
- Transaction-based revenue up 7% in the quarter impacted by strong development in the real estate market in Norway and market recovery in Sweden. Revenue YTD hampered by a weak first quarter
- Steady level of consulting revenues. Fewer upgrade projects in Sikri since the majority of customers have migrated to cloud are offset by increased demand for Metria’s consultant services within climate and sustainability



Optimizing investments across the Group to capitalize on growth potential

- Total capex of MNOK 22 in Q3 2024 is MNOK 2 lower than in Q3 2023
 - 8% of revenue in the quarter invested to develop new functionality and new features to strengthen the market leading positions
1. Fairly stable level of capex in Ambita and Sikri but will vary with type of ongoing development projects
- Stable capex in Metria in the quarter but has increased YTD due to investments in new product offerings and core products
 - Investments in iVerdi and Unbolt (other) related to solutions to optimize the interaction between real estate valuation and inspection companies more effective and efficient
 - Total capex in Boligmappa is estimated down by MNOK 10 for FY 2024 compared to FY 2023 following less need for new development



Double-digit EBITDA growth and increased profitability

Summary of developments

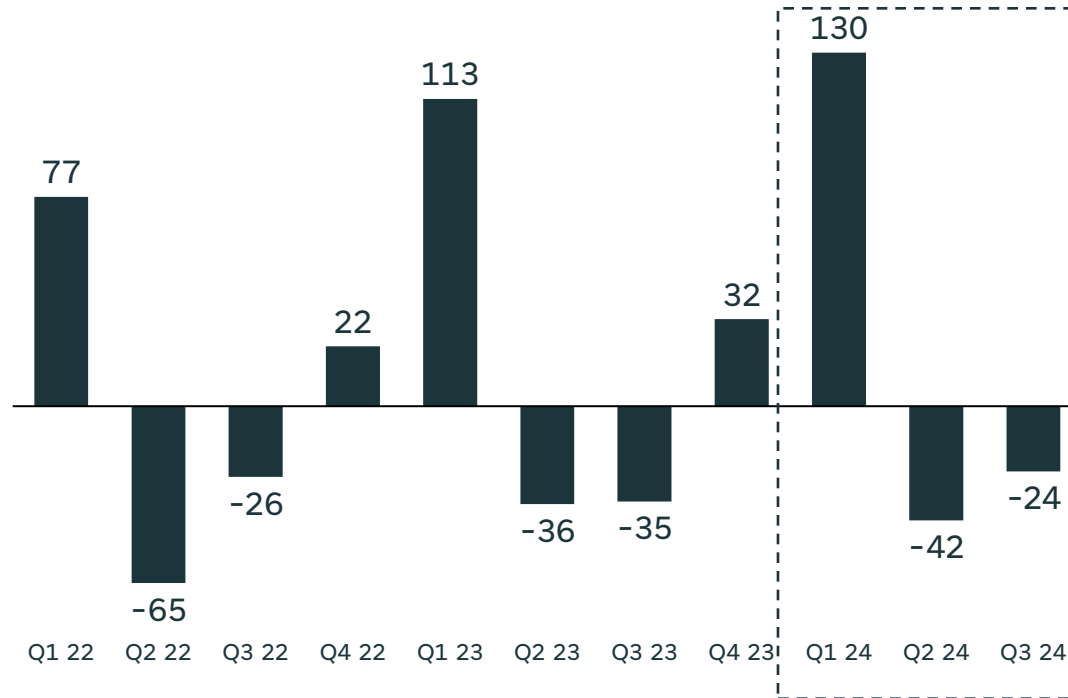
- Double digit EBITDA growth of 15% in the quarter with increasing margin
- Operating profit up 6% to MNOK 20 from Q3 2023
- Financial income boosted with MNOK 38 non-cash IFRS adjustment following a GAAP adjustment in relation to the revaluation of the minority shareholding of 44% offset by charged loss of MNOK 7 on interest rate swaps
- Interest on borrowings of MNOK 12 down MNOK 0.9
- Net income of NOK 40 in the quarter compared to MNOK 6 in Q3 2023 following increased operating profit and increased financial income

NOK 1000	Q3 2024	Q3 2023	Change %	YTD 2024	YTD 2023	Change %
Revenue	281 995	263 859	7 %	852 779	814 604	5 %
Cost of providing services	113 403	108 699	4 %	348 535	333 395	5 %
Gross profit	168 592	155 160	9 %	504 243	481 209	5 %
Personnel expenses	84 902	81 103	5 %	271 486	259 648	5 %
Other operating expenses	28 329	25 881	10 %	90 639	86 629	5 %
EBITDA	55 361	48 175	15 %	142 118	134 932	5 %
Depreciation and amortization expenses	35 241	29 135	21 %	100 089	88 972	12 %
Operating profit	20 120	19 040	6 %	42 028	45 960	-9 %
Financial income	33 761	1 820	1 756 %	51 848	4 110	1 162 %
Financial expenses	-13 752	-14 419	5 %	-45 547	-40 159	13 %
Profit before income tax	40 129	6 442	523 %	45 547	9 910	56 %
Income tax expense	353	758	-53 %	1 967	1 539	360 %
Profit from continuing operations	39 775	5 684	600 %	43 581	8 371	442 %
Profit from discontinued operations					-6 866	
Net income	39 775	5 684	600 %	43 581	1 506	2 794 %

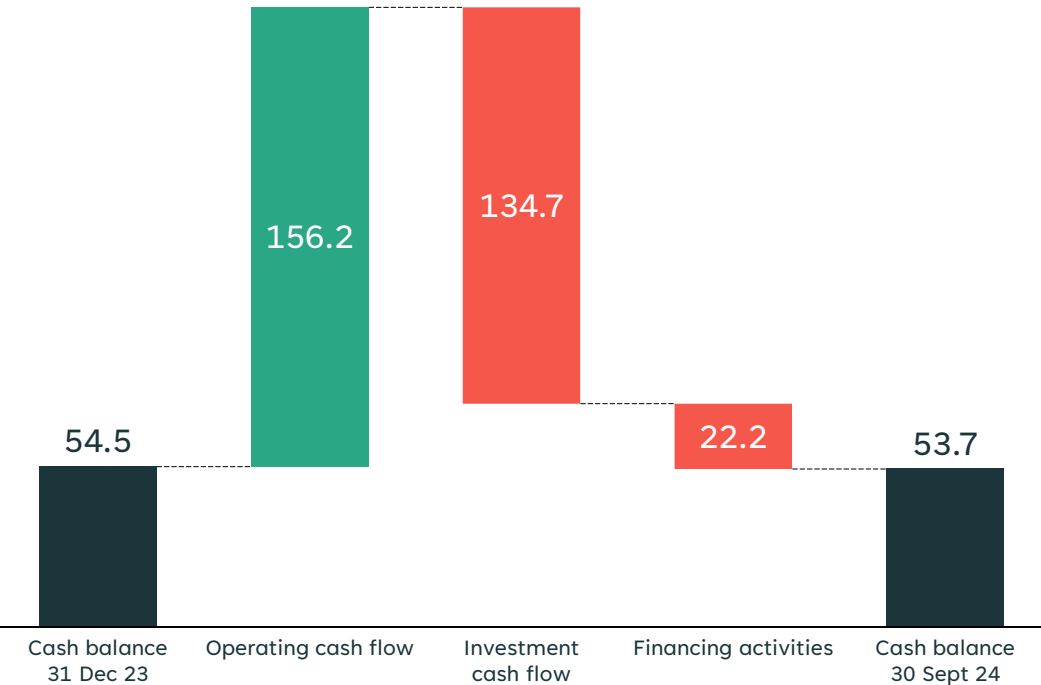
Increased free cash flow in first nine months of 2024

–up from MNOK 42 in first nine months of 2023 to MNOK 59 in first nine months of 2024

Free cash flow (MNOK)¹



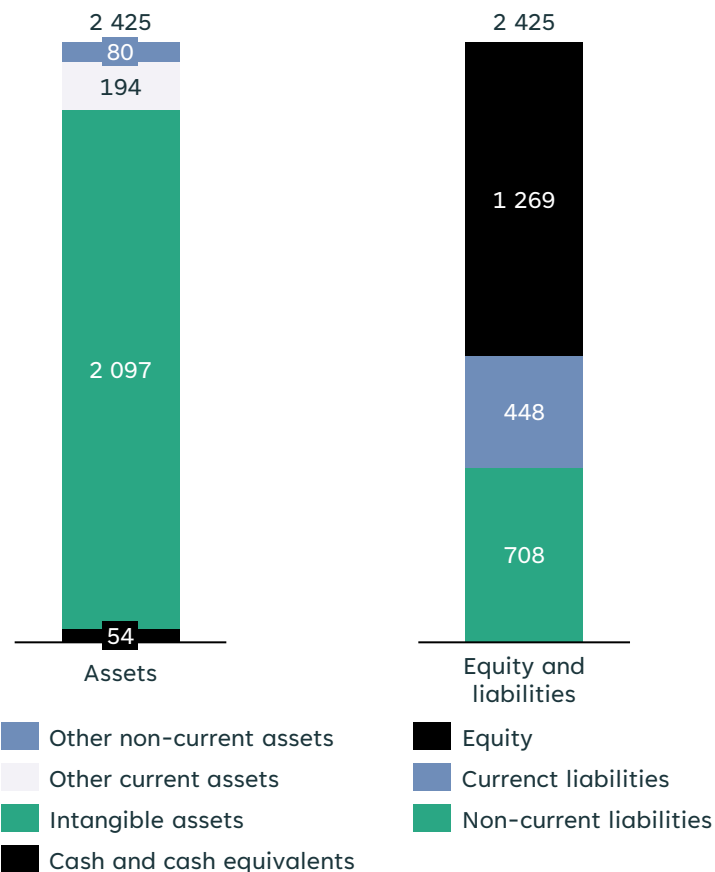
Cash flow bridge YTD 2024



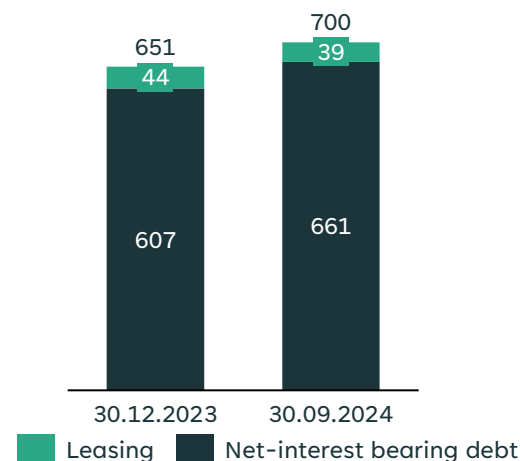
1) Free cash flow includes; operating cash flow, lease repayments and Capex (fixed assets and capitalized development costs) Excludes acquisition costs.

Strategy of reducing interest bearing debt but acquisition of Unbolt considered significant to strengthen real estate offering

Financial position 30.09.2024 (MNOK)



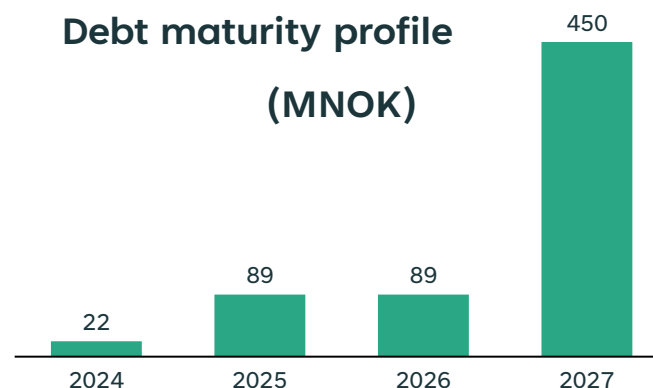
Net interest-bearing debt (MNOK)



Details

- NIBD incl lease liabilities increased by MNOK 49 from year-end 2023 to MNOK 700 in September 2024
- Bullet loan increased with MNOK 80 to MNOK 450 (mature in 2027) in connection with the acquisition of Unbolt and subsidiaries
- RCF of MNOK 50 renewed and drawn in the quarter
- Installments changed from semiannual to quarterly from July 2024. Installment of MNOK 22 paid in July 2024. In 2023 there were two installments of MNOK 44 in April and November
- 57% of interest-bearing debt as of 30.09.2024 covered by interest rate swaps at favorable terms:
 - MNOK 243 at 3.24% (mature in 2032)
 - MNOK 162 at 3.25% (mature in 2028)
- Equity ratio of 52%
- Cash-balance of MNOK 54
- Liquidity reserve of MNOK 50

Debt maturity profile (MNOK)



Q3 2024 financial summary

#1

Steady growth in ARR and increasing revenue driven by growth in the real estate business area

#2

Focus on cost control starting to show results

#3

Increasing profitability

#4

Add-on acquisition successfully onboarded to provide a more complete real estate product offering

Continued improved financial results and positioned for further growth



Q3 Business Update

Per Haakon Lomsdalen

Software house with #1 positions in two business areas

Strong Nordic brands delivering mission-critical software and data



Real Estate

Spir Group is driving the digital transformation of the real estate industry by delivering software and data solutions that enhance transparency, efficiency and sustainability



Real Estate – Higher activity and market recovery

Positive trend continuing into Q4



3% growth properties put up for sales in Norway in Q3 compared to Q3 2023. Growth within real estate information – market recovery, Sweden



Real estate portfolio strengthened through the acquisition of Unbolt with the subsidiary iVerdi – a major player with software for real-estate appraisal



AI pilot programs towards real estate agents launched in partnership with Prosper AI, in which we invested earlier this year. Byggesøknaden increased by 27%



Key win for Metria with Svenska kraftnät in Sweden, total contract value 12,7 MSEK, with possible additional options



New CEO of Boligmappa from August 2024

Public Administration

With its mission critical software and solutions, Spir Group is supporting Public sector with insight, control and digitalization of law regulated processes



Public Administration – Continued solid progress

Increasing sales to new customers in addition to up-sales to existing customers



Won all public tenders in the quarter -
winrate Q3 100%



Key win with Stavanger Municipality –
MNOK 17.4 over three years with options
for add-on sales



Signed Partner agreement with Telenor
for sales and distribution of the AIoT
solution





Outlook

Outlook

Continue to pursue our growth strategy

- Positive indications in the Norwegian real estate market and recovery in Sweden
- High demand for secure and efficient IT solutions across both segments and steady growth in revenues
- Investments in product development to improve margins and cash flow
- Open data in Sweden in 2025 may impact revenue but creates opportunities within new data sources and product development
- The demand for consulting services in IT solutions and specialized expertise in climate and environmental domain is steadily rising in Sweden
- Cost control and efficiency improvements continue to be key focus areas



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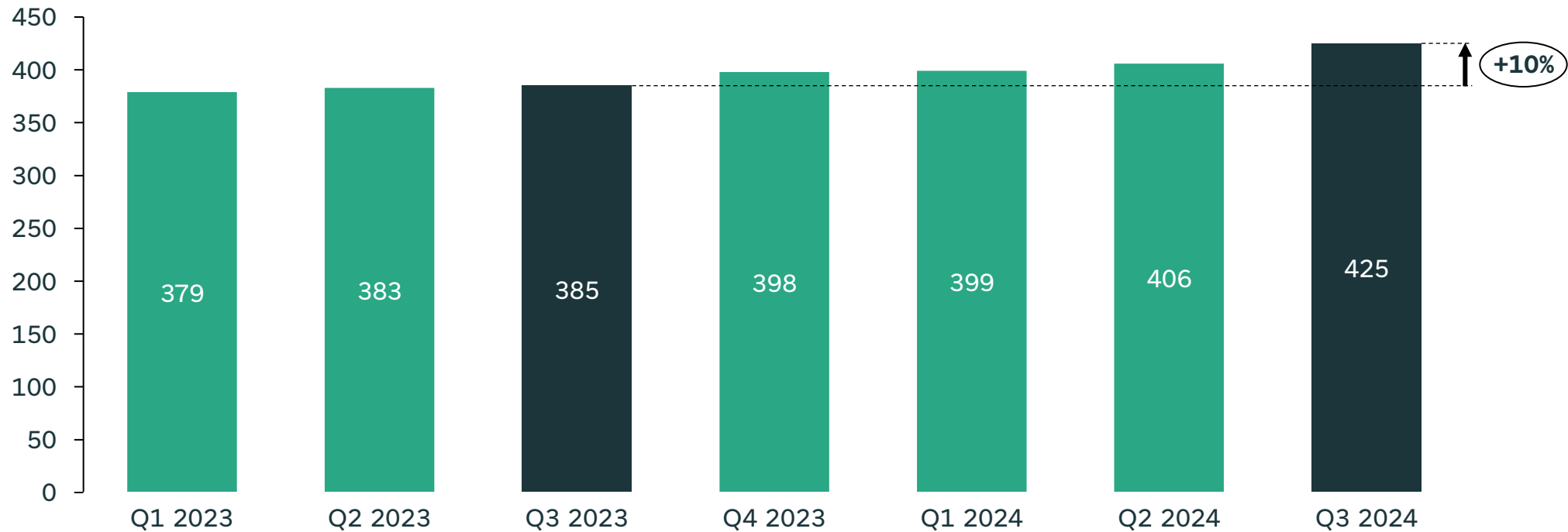
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Appendix

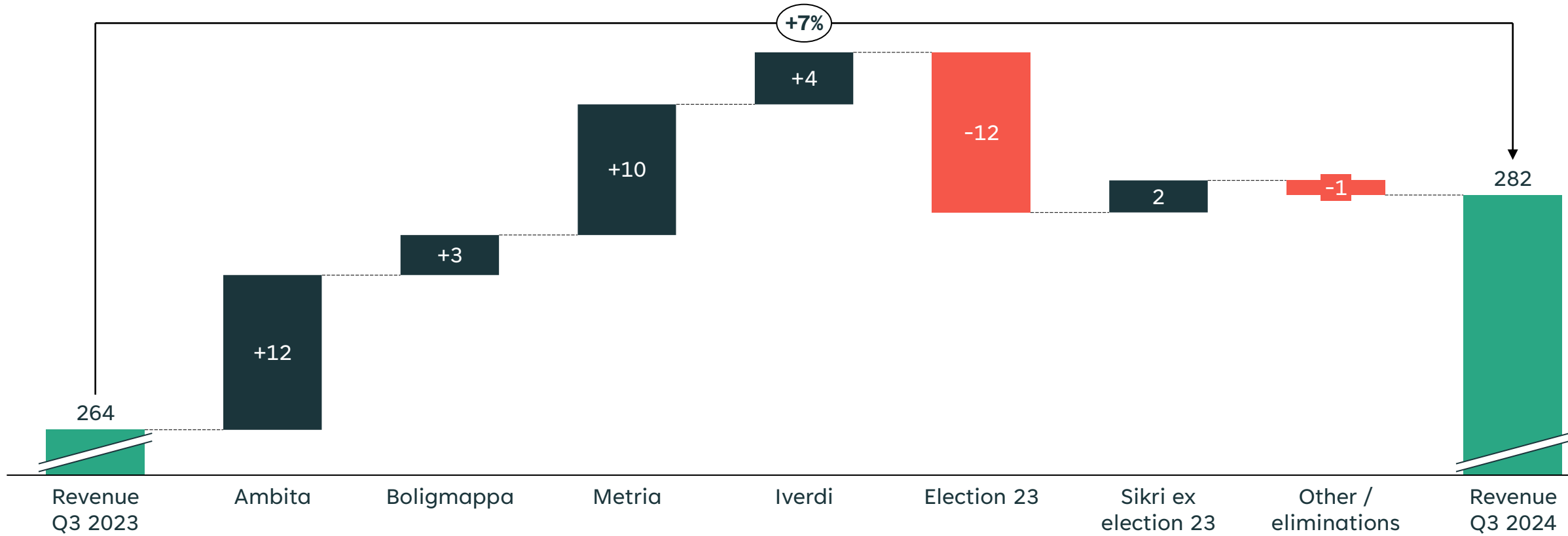
Historical financial proforma figures, adjusted for acquired and divested business

ARR growth 10% for Spir Group year-over-year

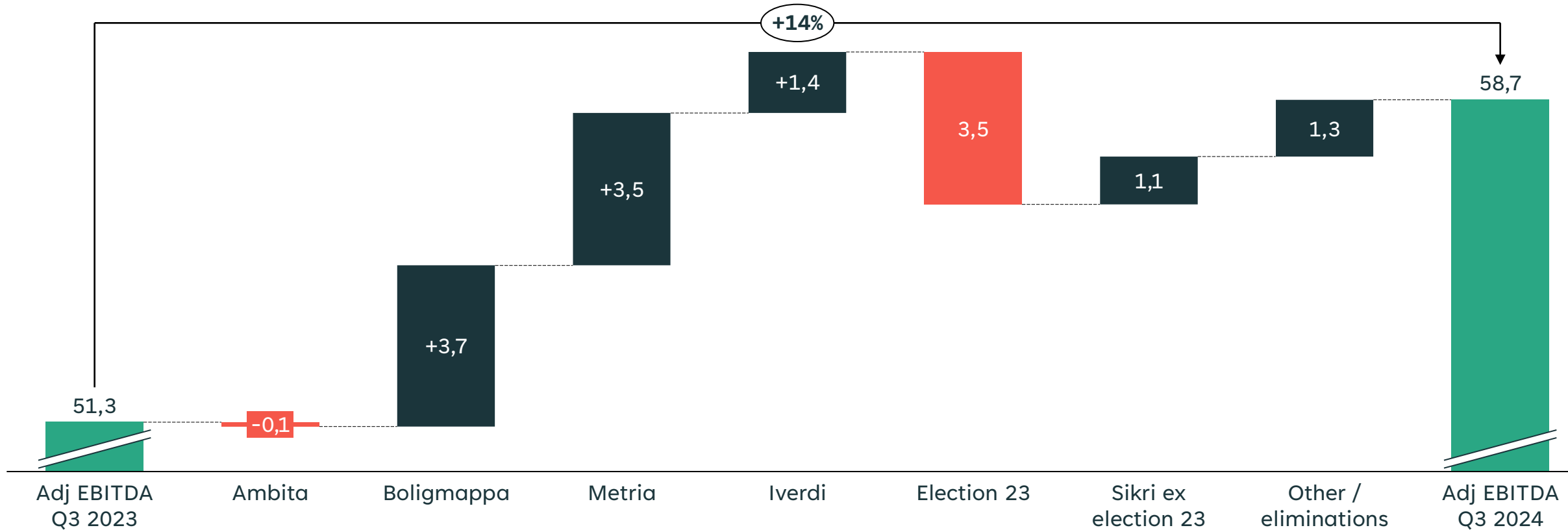
Annual Recurring Revenue (MNOK)



Revenue growth of 7% in Q3 2024



Double digit adj EBITDA-growth of 14% in the quarter



Updated proforma financials^{1,2}

Revenue (MNOK)	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
Sikri	66	66	73	69	67	66	63
Ambita	110	137	115	82	109	153	127
Boligmappa	11	11	11	13	12	13	14
Metria	72	75	62	74	74	74	72
Iverdi					9	12	10
Other/elimination	3	1	2	3	3	1	3
Total revenues	261	289	264	241	274	319	289

Gross Profit (MNOK)	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
Sikri	57	56	57	60	59	59	56
Ambita	44	55	46	37	43	59	50
Boligmappa	11	10	11	13	11	13	14
Metria	45	47	38	47	45	43	43
Iverdi					6	9	7
Other/elimination	2	0	4	2	3	1	3
Total gross profit	158	168	155	159	167	184	173

ARR(MNOK)	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
Total ARR	379	383	385	398	399	406	425

1) Proforma figures adjusted for divestment of Metria Planning and Surveying.

2) Due to a historic accounting error in 2020-2023 in Ambita, the comparative figures for 2023 have been revised. The error specifically affects revenues, short-term liabilities, and equity. Revenue in 2023 is affected by MNOK 1.0.

Updated proforma financials^{1,2}

EBITDA (MNOK)	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
Sikri	16	18	22	20	18	19	19
Ambita	16	30	22	11	13	33	21
Boligmappa	0	-1	1	0	0	-2	4
Metria	13	8	9	11	10	7	15
Iverdi					3	6	3
Other/elimination	-7	-6	-6	-9	-11	-7	-8
Total EBITDA	38	49	48	34	33	56	54

Adjusted EBITDA (MNOK)	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
Sikri	18	18	23	21	18	19	20
Ambita	16	30	22	11	13	33	22
Boligmappa	0	-1	1	0	0	-1	4
Metria	16	11	11	13	12	9	15
Iverdi					3	6	3
Other/elimination	-5	-5	-5	-6	-11	-7	-7
Total adjusted EBITDA	45	53	51	39	35	59	57

Cash EBITDA (MNOK)	Q1'23	Q2'23	Q3'23	Q4'23	Q1'24	Q2'24	Q3'24
Sikri	8	10	14	10	10	11	13
Ambita	12	26	18	11	10	28	18
Boligmappa	-6	-7	-4	-8	-6	-5	-1
Metria	8	4	5	5	4	1	11
Iverdi					-2	-3	-2
Other/elimination	-8	-5	-9	-7	-17	-9	-13
Total cash EBITDA	14	26	25	10	-1	23	26

1) Proforma figures adjusted for divestment of Metria Planning and Surveying.

2) Due to a historic accounting error in 2020-2023 in Ambita, the comparative figures for 2023 have been revised. The error specifically affects revenues, short-term liabilities, and equity. Revenue in 2023 is affected by MNOK 1.0.

A SPIR COMPANY

About Ambita

- Number #1 positions with trusted solutions
- Ambita's offerings covers 9 of 10 processes in a real estate transaction
- Software services that connects real estate agents, banks and insurance companies
- At the forefront of digitizing the settlement process in real estate transactions
- Driving innovation and propelling the real estate market forward
- Transaction-based revenues correlated to the real estate market and seasons

ambita



Leading digital real estate and construction software in Norway, enabling digital transformation and services:

ambita

Tinglysingstjenester

Digital samhandling

Byggesøknaden

Eiendomsinformasjon

Infoland

Karttjenester

Propfinder

Digital planvarslng

A SPIR COMPANY

About Boligmappa

- Boligmappa is a digital platform where property owners and professionals can find, store and share data and compulsory documentation about a property
- Hjemla provides automatic property values, price statistics and market information to empower data-driven decisions in the housing market
- Boligmappa and Hjemla is available for all homeowners free of charge with the possibility to upgrade to premium offerings
- Since their inception Boligmappa (2012) and Hjemla (2023) have attracted more than 1 million unique registered users
- High attention from media, politicians and key industrial players



A digital platform connecting all sides of the housing and real estate lifecycle, from private homeowners to large professional contractors:



A SPIR COMPANY

About Unbolt

- A Nordic ecosystem around property condition data, providing unique insights and analytics about the building stock
- Delivers the software Ivit, Norway's most used professional software for valuation engineers through the subsidiary Iverdi
- The software offers effective process support, data-driven quality assurance and a variation of different valuation reports and allows direct interaction and sharing of information between real estate agents and valuers' systems for increased security and efficiency

unbolt

 Spir Group

A data and analytics platform to support faster and more sustainable decision making in the construction and property industry

unbolt

VERDI

BUILDFLOW™

REDUCE

DOMUSPECT 
- det digitale flyttesyn

About Metria

- #1 position in Sweden within real estate information and geodata with key customer verticals within; Public sector, Bank & Insurance, Energy & Telecom and Forestry industry
- Digital solutions and services within geodata, real estate information, geographical information systems and remote sensing
- Exciting climate & environment offering – identification of climate risks and opportunities for reduced climate impact
- Revenue mix of transactional, SaaS and consultancy revenues. Transaction based revenues correlates to size of mortgages and properties sold

Metria is an expert in geographic information and digital solutions:

- Information services
- SaaS solutions
- Expert analysis
- Customer specific IT solutions

A SPIR COMPANY

About Sikri

- Mission critical software for public administration and seamless processes mandated by law
- Case processing, building applications, archiving, document management, data collection and handling
- Key player and strong #1 positions
- Revenue with high ARR, long-term SaaS agreements & solid customer base
- Consulting revenue related to implementation and customer excellence
- Assist public administration with reaching its goal for efficient use of resources, and improving citizen services
- Digital counting solution for elections in Norway – next up VALG2025



Providing mission critical software for public sector:



