2026 HALF-YEAR RESULTS

Friday, July 24, 2026

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1st Half of 2026: Key Takeaways

- Significant improvement in results for the 1st half of 2026
  - ✓ **Half-year EBIT exceeded 100 €M** for the 1st time in the Group's history
  - ✓ **Operating margin of 11.3%, up 1.6 points,** reflecting in particular significant productivity gains and the increasing value of the product portfolio across both divisions
  - ✓ **Operating Free Cash Flow remains positive**, with capacity investments and inventory levels tailored to support the acceleration of business at the LISI AEROSPACE division and secure the continued growth of major civil and military programs

- Discipline and control
  - ✓ **Sound management is essential** in a global environment that remains uncertain
  - ✓ **Consolidation of productivity gains** as teams build expertise and new equipment is deployed
  - ✓ **Numerous strategic initiatives**: automation, robotization, digitalization, new products, capacity investments, and rationalization of the geographic footprint

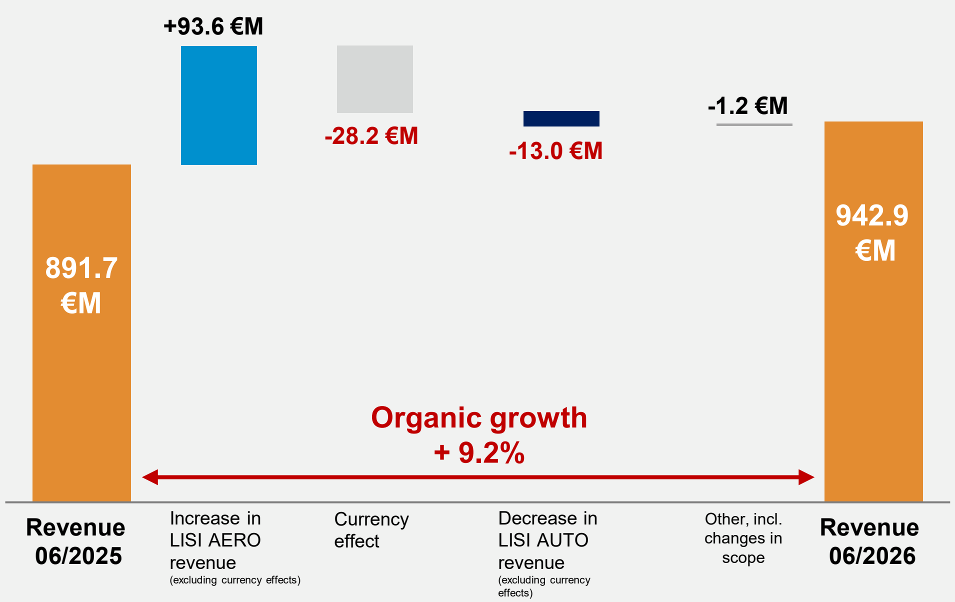
1st half of 2026: historically high level of activity

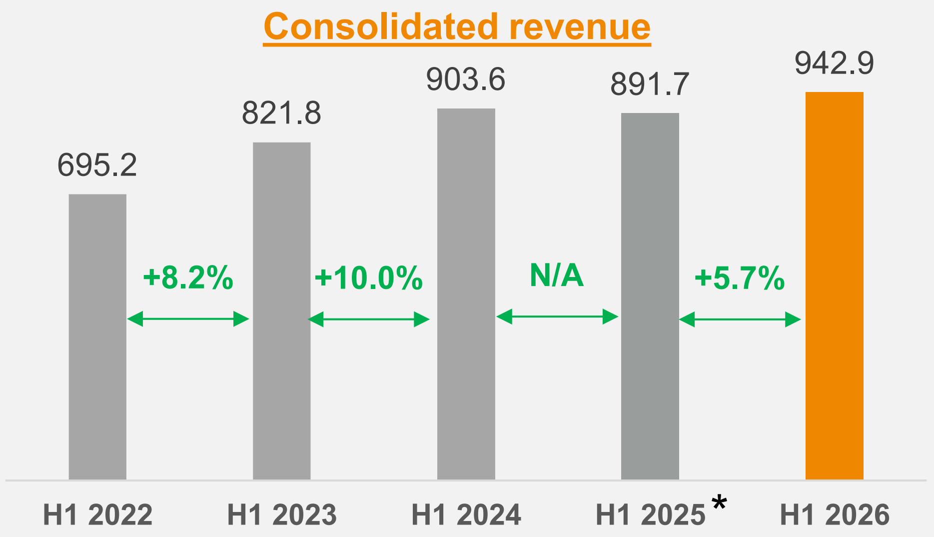
- **Reported revenue**
  - ✓ **942.9 €M**, **up 5.7%** compared to H1 2025[1], or **an increase of 51.2 €M in revenue**

- **Positive organic growth**
  - ✓ **+9.2% compared to H1 2025**
    Organic growth in H1 2025: +9.7%

- **Negative scope and currency effects**
  - ✓ **Consolidated scope:**
    - **+3.3 €M** (0.4% of revenue), related to the consolidation of LISI AUTOMOTIVE Hungary,
    - **-5.6 €M** (0.6% of revenue) corresponding to the deconsolidation of the 53.8% stake held in Ankit Fasteners (India)
  - ✓ **Currency:**
    - **-28.2 €M** (3.0% of revenue), compared to -6.0 €M in H1 2025

1 Following the deconsolidation of the LISI MEDICAL division on October 31, 2025
2 Organic: at constant scope and exchange rates

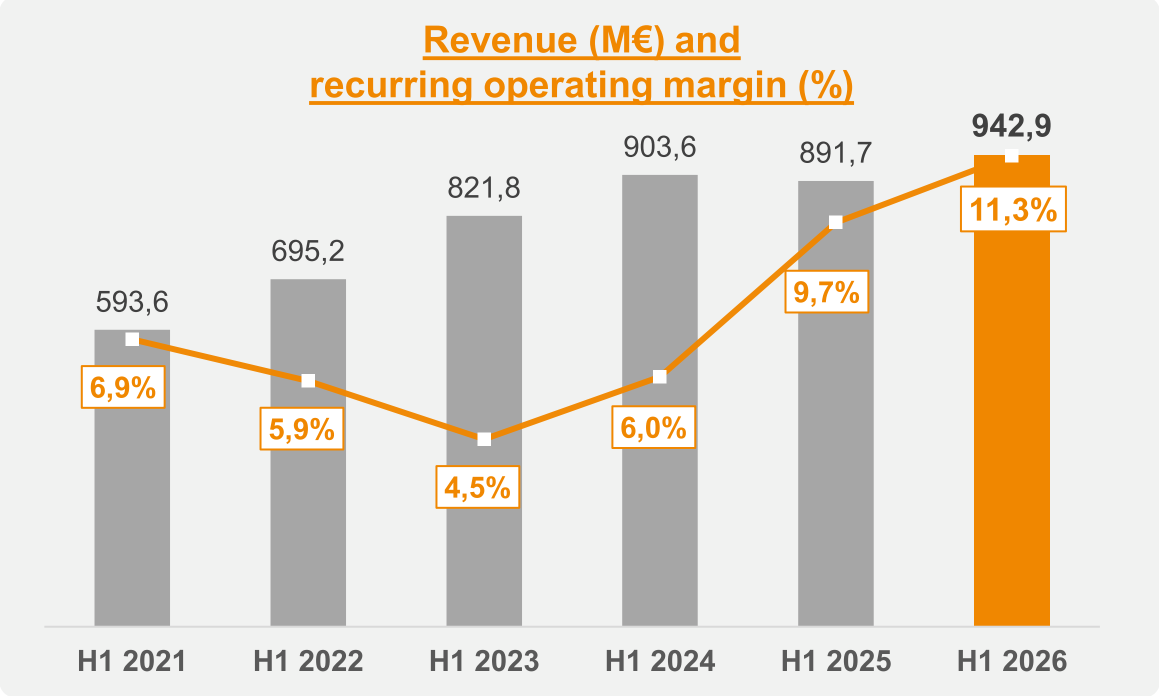


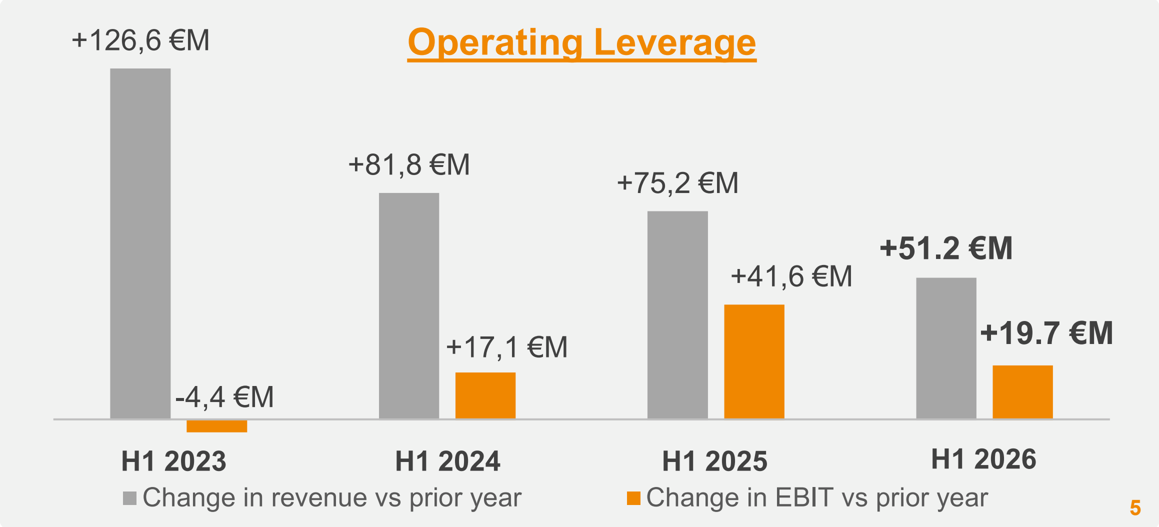


* Revenue restated to exclude the divestiture of LISI MEDICAL (87.1 €M)

EBIT> 100 €M, MOP at 11.3% of revenue

- **Current EBITDA: 148.3 €M**, up 15.2 €M compared to H1 2025, with both divisions contributing to this growth:
  - ✓ strong volume effect and significant productivity gains, training, and automation (**LISI AEROSPACE**)
  - ✓ structural reduction in the break-even point and continued repositioning of the product mix toward higher-value-added products (**LISI AUTOMOTIVE**)
- **The EBITDA margin was 15.7%** (14.9% in H1 2025, which had benefited from the lingering effects of inflation on selling prices)
- **Record EBIT: 106.2 €M**, up 19.7 €M from H1 2025 (a 22.8% increase)
- **Double-digit recurring operating margin: 11.3%**, representing an increase of +1.6 points compared to H1 2025





Positive Free Cash Flow

- **Cash flow from** operations **for H1 2026: 119.4 €M**, or 12.7% of revenue (+30.6 €M compared to H1 2025), which will finance **CAPEX totaling 48.0 €M** (5.1% of revenue).

  Priority given to:

  ✓ expanding industrial capacity to support the momentum in the aerospace sector

  ✓ the development of new products and the expansion of product lines

  ✓ innovation and automation

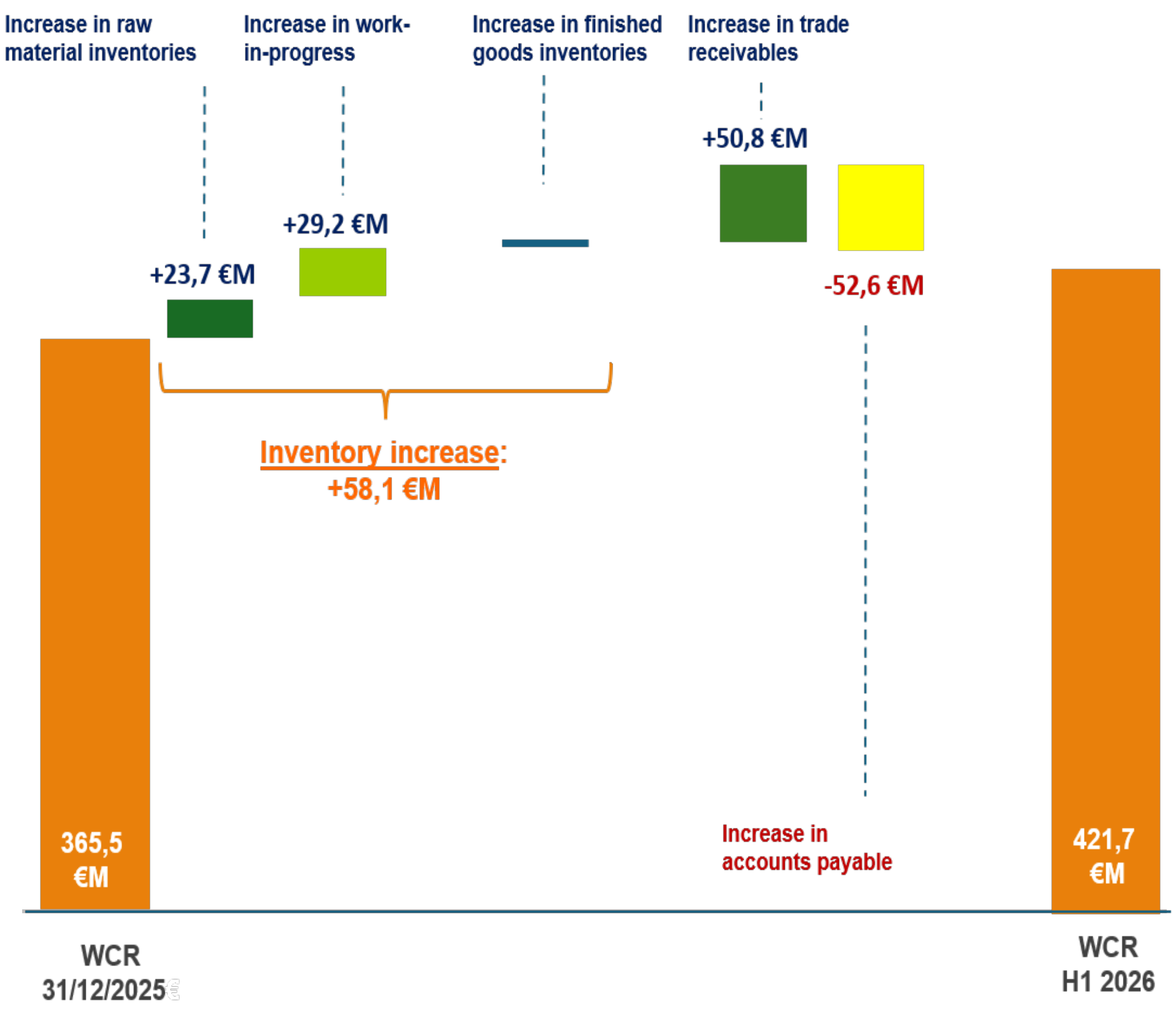
- **Working capital requirements** stand at **84 days** of revenue; an increase of 9 days compared to December 31, 2025:

  ✓ Increase in inventory days to 109 days as of the end of June, intended to support production increases in the coming months to meet the sharp rise in demand from major customers in the LISI AEROSPACE division

➡ **Operating Free Cash Flow for H1 2026: 5.9 €M**

(-14.3 €M in H1 2025)

Reconciliation table:
Working Capital as of 12/31/2025 → Working Capital for H1 2026



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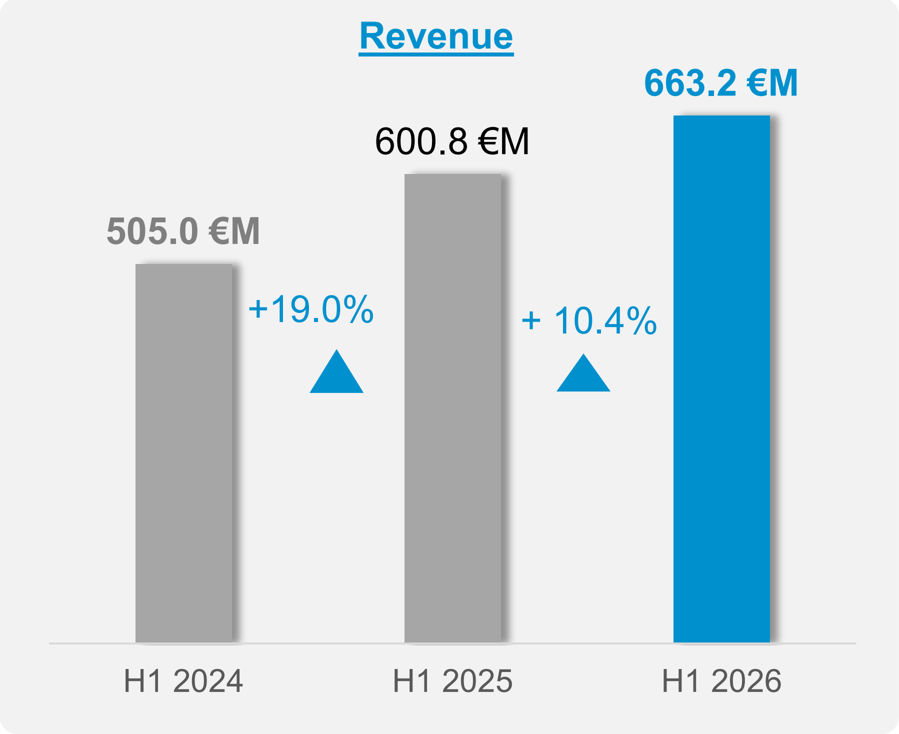
LISI AEROSPACE

Market

- Global air traffic and cargo volumes performed well in H1 despite the crisis in the Strait of Hormuz; demand from airlines remains higher than supply from aircraft manufacturers
- Continued increase in production rates:
  - ✓ Airbus: A320 (currently 66 aircraft per month, with a target of 75 aircraft per month in 2027); A350
  - ✓ Boeing: Production ramp-ups completed for the B737 MAX and B787 programs
- Helicopter and defense segments remain strong

Business

- Exceptionally high level of activity, continuing the record set in Q1 2026
- Revenue up +10.4% compared to H1 2025, despite a significantly negative currency effect (-25.6 €M compared to H1 2025)
- Organic growth for the division: **+15.8%** compared to H1 2025
  - ✓ **"Fasteners US":** **+23.7%** compared to H1 2025
    Strong ramp-up at Boeing
  - ✓ **"Fasteners Europe":** **+10.7%** / H1 2025
    High base effect, +17.7% in H1 2025
  - ✓ **"Structural Components":** **+11.2%** / H1 2025
    Persistent pressures across the entire supply chain
- Major contracts renewed in 2025 and 2026

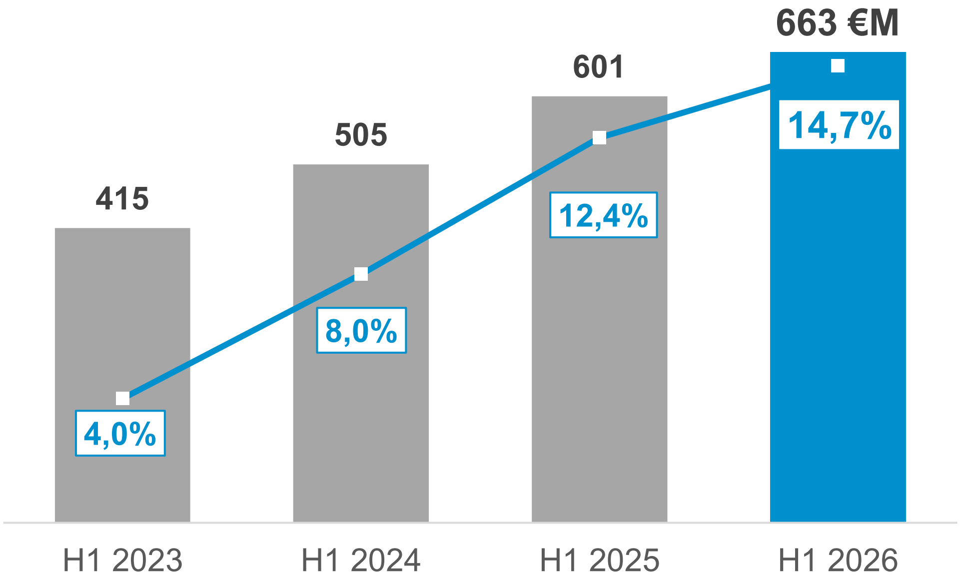


LISI AEROSPACE

EBIT and Current Operating Margin

- **EBIT** in H1 2026: **97.3 €M** (+30.7% vs. H1 2025)
- **Current Operating margin** at **14.7%** of revenue (+2.3 points vs. H1 2025)
- **Particularly strong operating leverage** driven by:
  - ✓ better absorption of fixed costs thanks to higher volumes resulting from market share gains,
  - ✓ initiatives to expand high-value-added product lines
  - ✓ improved manufacturing productivity following the initial phase of significant hiring in previous fiscal years and the ongoing optimization of production flows

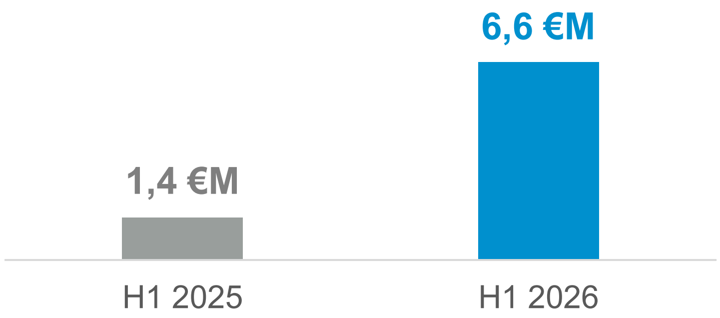
Revenue (M€) and current operating margin (%)



Positive Free Cash Flow of 6.6 €M, compared to 1.4 €M as of June 30, 2025

- Cash flow from operations increased by 13.5 €M (89.1 €M in H1 2026)
- Increase in work-in-progress inventory due to ramp-up in production
- Capital expenditures totaling **37.1 €M** (31.9 €M in H1 2025), primarily allocated to:
  - ✓ supporting the ramp-up of production capacity
  - ✓ improving industrial productivity in response to sustained customer demand

Free Cash Flow



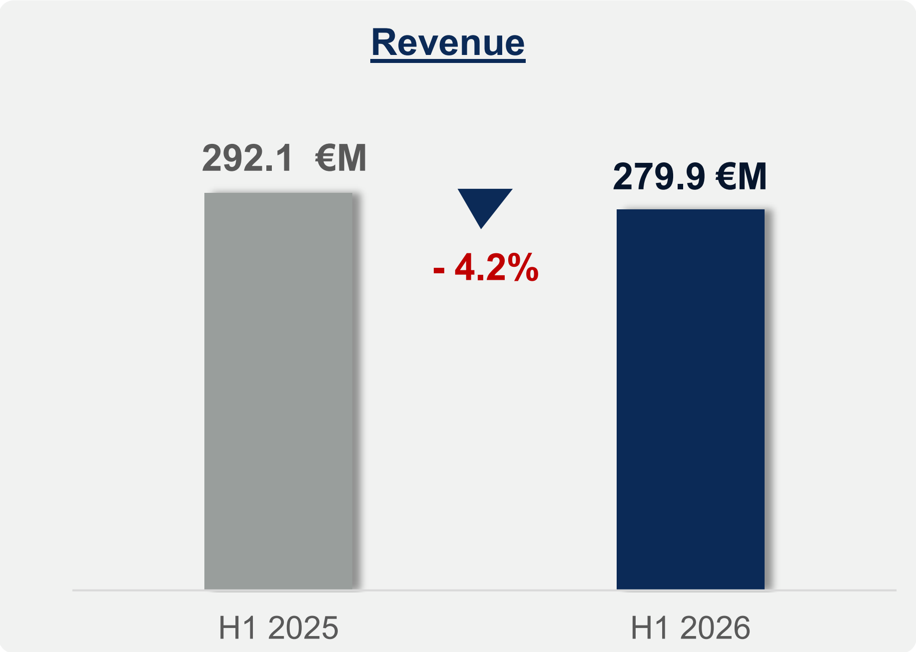
LISI AUTOMOTIVE

Market

- Global light-duty vehicle market down in the first six months of 2026 (-3.9%),
- Registrations of battery-electric vehicles rose sharply in Europe during the first six months of 2026: +35,1% in the EU, EFTA, and the United Kingdom, and +40,5% in the European Union
- Regional disparities in the adoption of different technologies and their competitive implications

Activity

- Organic revenue change in H1 2026: -4.4%, reflecting a -2.5% decline in global production by the division’s customers
- Order intake for new products remains particularly strong (12.2% of revenue for the half-year)
- Continuation of the targeted growth strategy, which prioritizes expansion in high-growth, profitable segments (braking systems, interior trim, cable channels)
- Optimization of the geographic positioning of production sites (EUROMED)



LISI AUTOMOTIVE

EBIT and Current Operating Margin

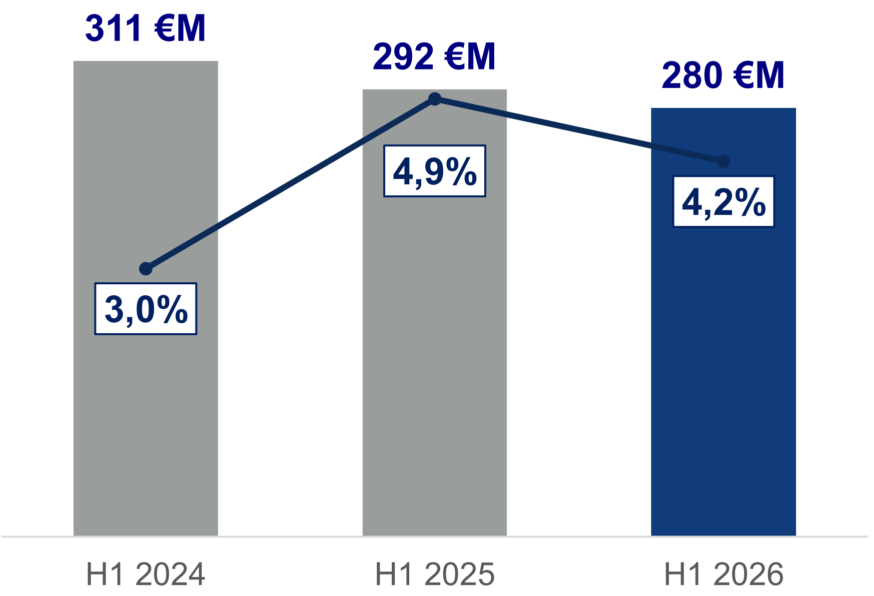
- **EBIT** of **11.8 €M (14.2 €M in H1 2025)**,

- **Current Operating margin held up well**: down 0.7 point from H1 2025 to **4.2%** of revenue, thanks in particular to the disciplined implementation of measures to optimize fixed costs

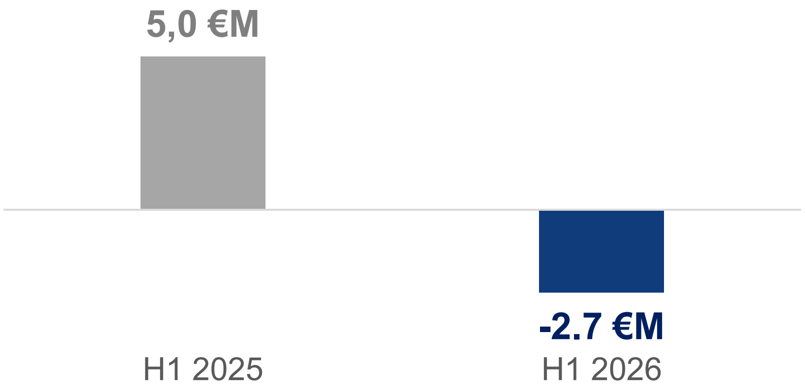
Free Cash Flow

- Free Cash Flow at **-2.7 €M** (H1 2025: 5.0 €M):
  - ✓ increase in cash flow from operations (+0.4% compared to H1 2025)
  - ✓ temporary inventory build-up associated with the transfer of manufacturing operations from the Puiseux-Pontoise site (France) to other entities within the division
  - ✓ continued investments (new products, manufacturing productivity)

Revenue and current operating margin



Free Cash Flow



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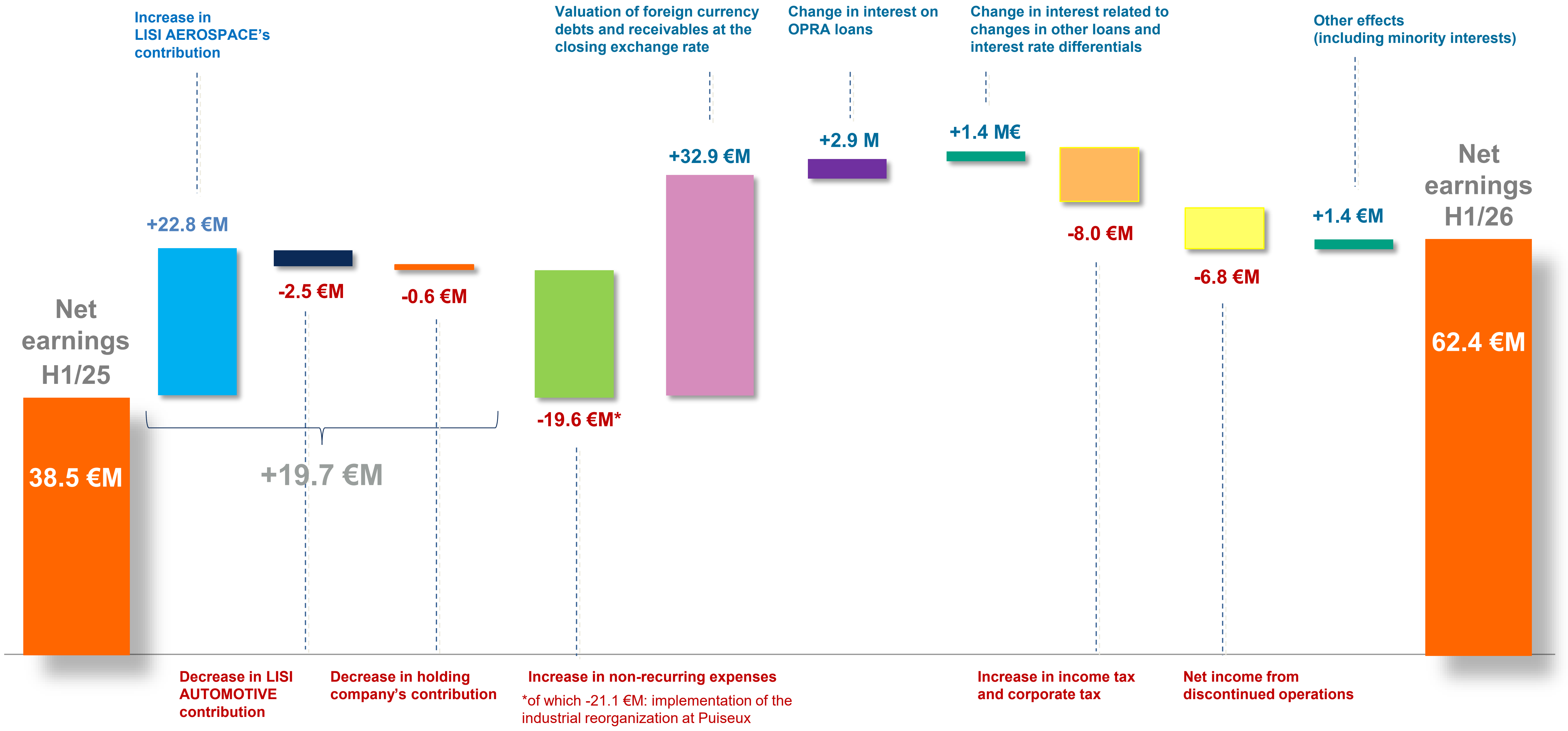
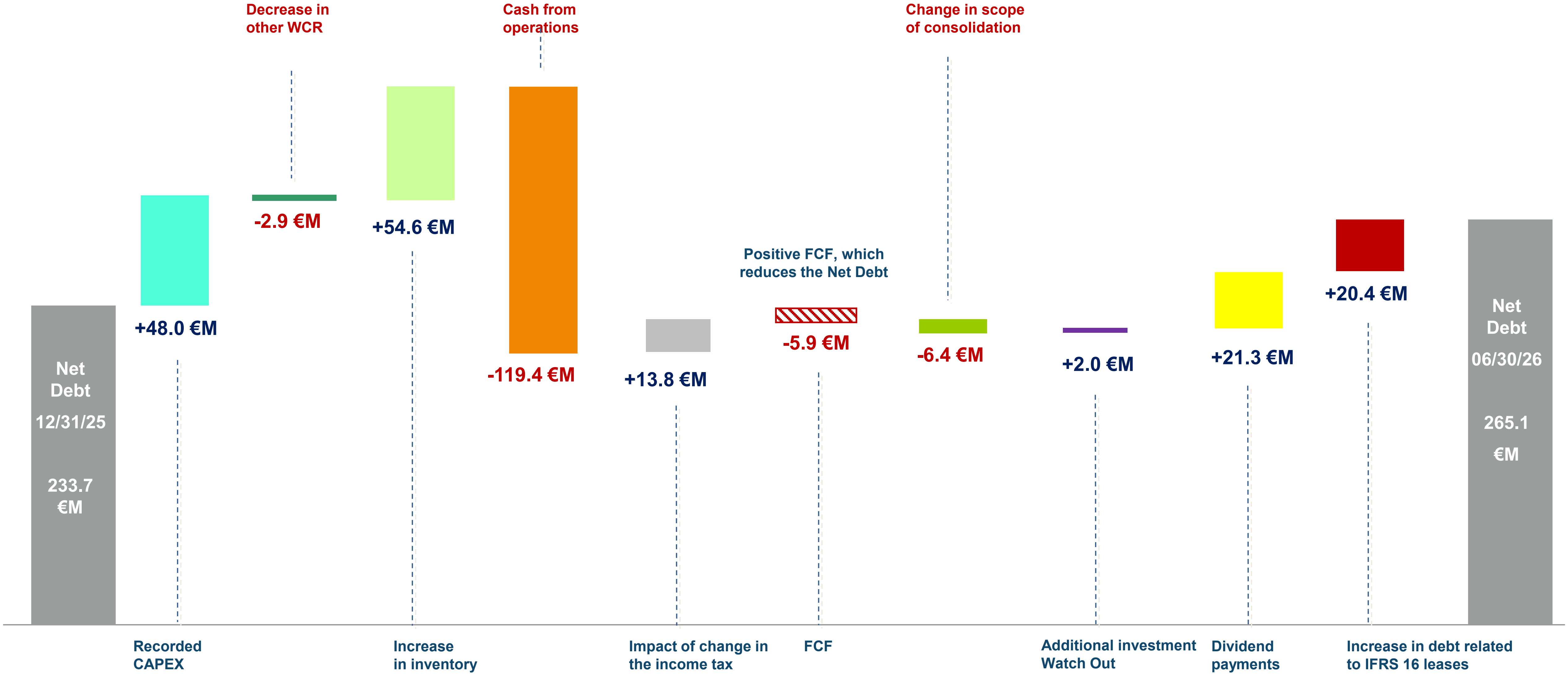
Income statement as of 06/30/2026

	30/06/2026		30/06/2025		CHANGES
	M€	% CA	M€	% CA	N / N-1
Revenue	942,9		891,7		5,7%
Production	970,6	102,9%	906,1	101,6%	7,1%
Added value	499,9	53,0%	461,4	51,7%	8,3%
Taxes and duties	-7,7	-0,8%	-7,7	-0,9%	0,4%
Payroll costs (including temporary employees)	-343,8	-36,5%	-320,6	-36,0%	-7,3%
EBITDA	148,3	15,7%	133,1	14,9%	11,4%
Depreciation	-46,4	-4,9%	-46,5	-5,2%	0,2%
Net provisions	4,3	0,5%	-0,2	0,0%	
EBIT	106,2	11,3%	86,5	9,7%	22,8%
Non-recurring operating expenses	-23,0	-2,4%	-3,4	-0,4%	
Operating profit	83,2	8,8%	83,0	9,3%	0,2%
Net financing expenses	-2,7	-0,3%	-40,0	-4,5%	93,1%
Corporate taxes	-18,4	-1,9%	-10,4	-1,2%	-77,1%
CVAE	-0,8	-0,1%	-0,8	-0,1%	-0,8%
Profit on disposal of assets classified as held for sale	0,0	0,0%	6,8	0,8%	
Minority interests	1,1	0,1%	-0,2	0,0%	
Net earnings	62,4	6,6%	38,5	4,3%	62,1%
Operating cash flow	119,4	12,7%	88,8	10,0%	34,4%

Net income transition table



Cash Flow Statement



21.4% of shareholders' equity

23.2% of shareholders' equity

Financial Ratios and Net Financial Debt

Covenants

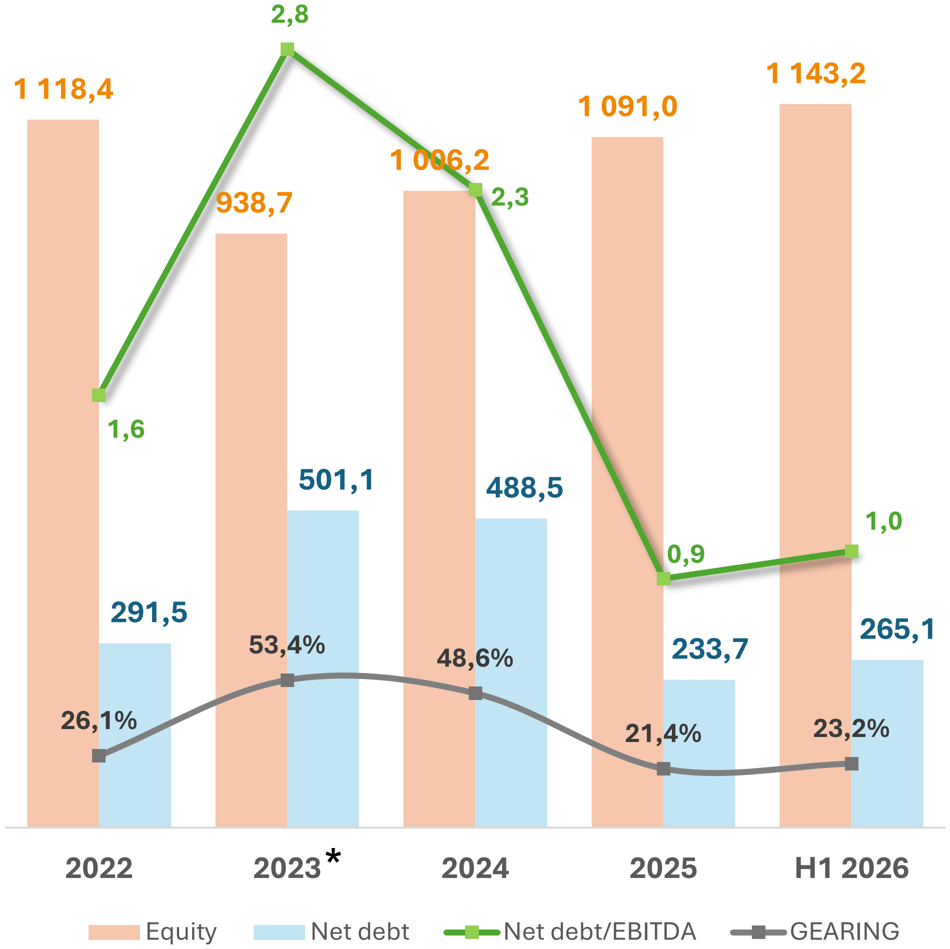
	06/30/2026	12/31/2025
Net Debt	265.1*	233.7*
Gearing	23.2%	21.4%
Net debt / Cash Flow	1.2	1.2
Net debt / EBITDA	1.0	0.9

* Of which debt related to lease agreements under IFRS 16 leases	123.3 €M	110.6 €M

Return on Capital

	06/30/2026	12/31/2025
Capital Employed	1,408 €M	1,325 €M
ROCE (before tax)	12.8%	12.2%
ROE	14.3%	12.8%

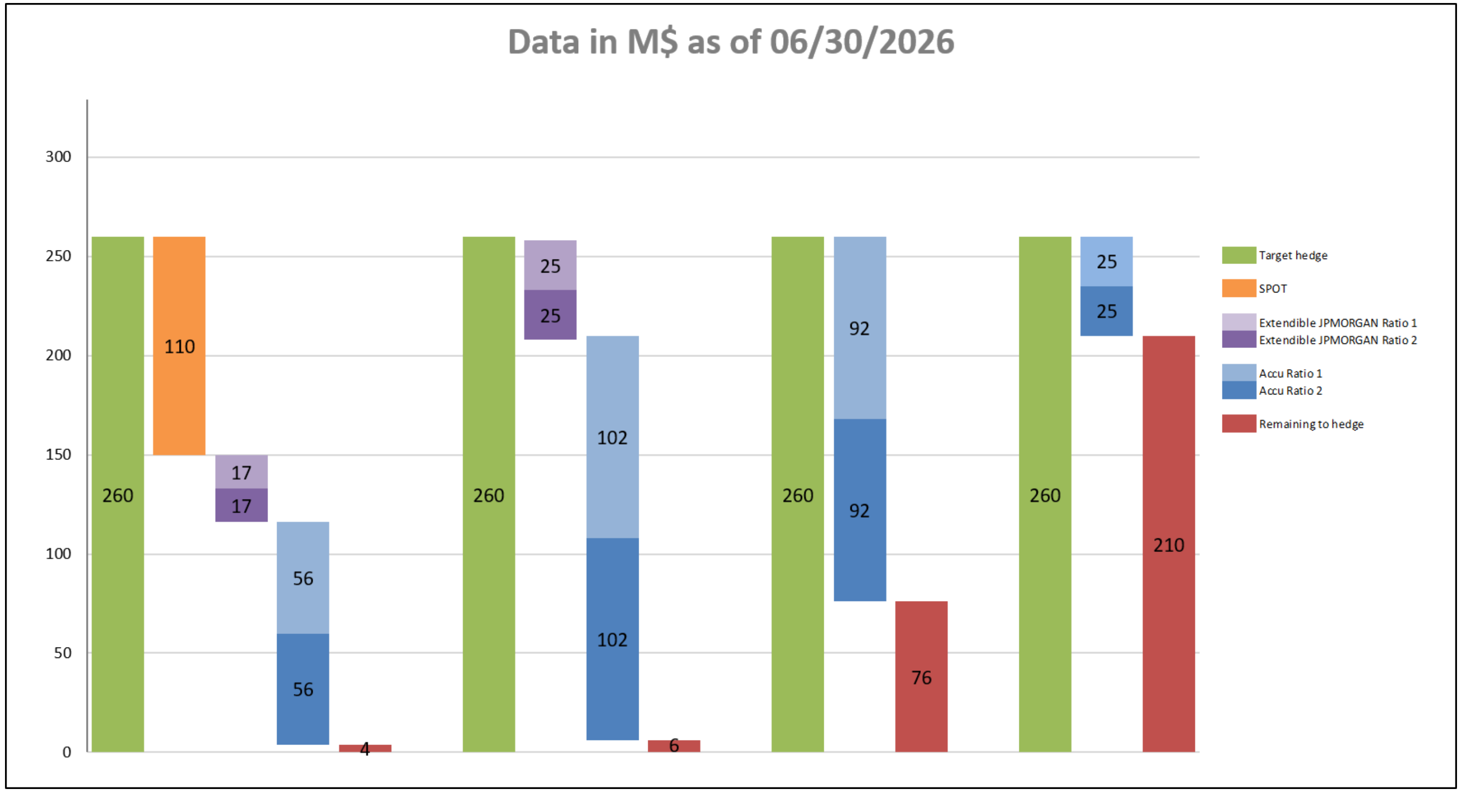
Net financial debt

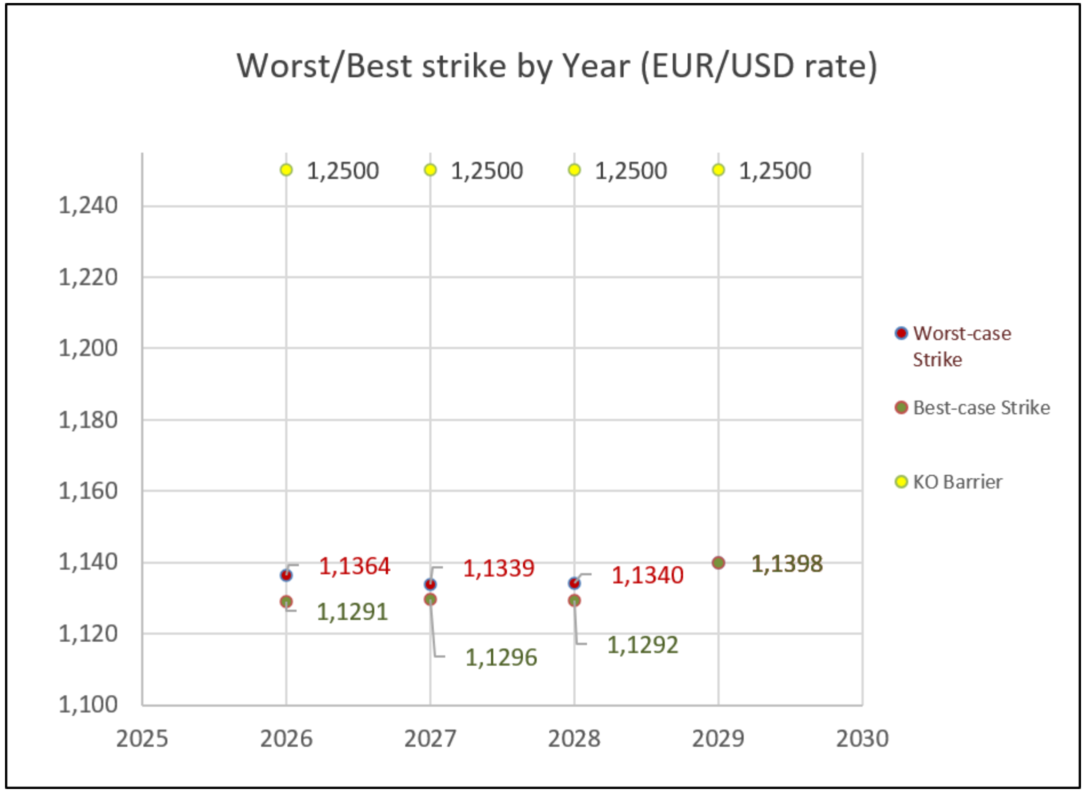


Covenants → Financial Leverage < 3.5; Gearing ratio < 120%

* of which OPRA: 204.6 €M

EUR/USD Hedging





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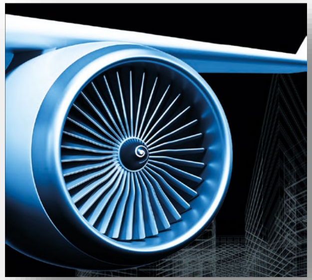
Trends as of July 24, 2026

➔ LISI AEROSPACE

- A very buoyant aerospace market across all platforms, supported by gains in market share with major strategic customers; a solid order backlog through 2027
- **Key Focus Areas**:
  - ✓ Increasing production capacity ("Fasteners"), improving industrial productivity ("Structural Components"), and ramping up investments
  - ✓ Increasing production volumes while controlling fixed costs and inventory levels



Objective: to meet customer needs and ensure program continuity amid persistent significant pressures across the entire aerospace supply chain

➔ LISI AUTOMOTIVE

- Continuation of structural measures to maintain competitiveness in a rapidly changing automotive market (in terms of competition, geography, and technology):
  - ✓ Positioning for new vehicle models
  - ✓ Adjustment of fixed costs
- Progress on the plan to cease manufacturing at the Puiseux-Pontoise site (France)
- Completion of the integration of LISI AUTOMOTIVE Hungary (Györ) and strengthening of manufacturing capacity in China, Mexico, and Morocco

Objectives[1]: The Group reaffirms its **ambition to improve its key financial indicators for the fourth consecutive year**, foremost among which is **EBIT**, and to generate **positive Free Cash Flow in 2026**. The rollout of the Group's longer-term cross-functional strategic initiatives may occasionally moderate operational leverage without undermining the solidity of the trajectory it has set

[1] Objective set on February 27, 2026, upon publication of the 2025 annual results

2026–2029: Two distinct trajectories, the same discipline in execution

- **LISI AEROSPACE: supporting market momentum with structural projects**
  - ✓ Development of new product lines, market share gains, and increased value of product lines
  - ✓ Potential for margin improvement driven by volume growth, product mix, and productivity gains (automation, industrial digitization, and scaling up of teams and equipment)
  - ✓ Sustained demand (civil and defense programs) and high order backlog visibility

- **LISI AUTOMOTIVE: Continuing a controlled repositioning**
  - ✓ A more selective product and customer portfolio, focused on higher-value-added applications (safety components, braking systems, new powertrains)
  - ✓ Lowered break-even point and cost discipline, with manufacturing operations aligned with market conditions
  - ✓ Product and process innovation to drive differentiation and generate consistent cash flow over the long term

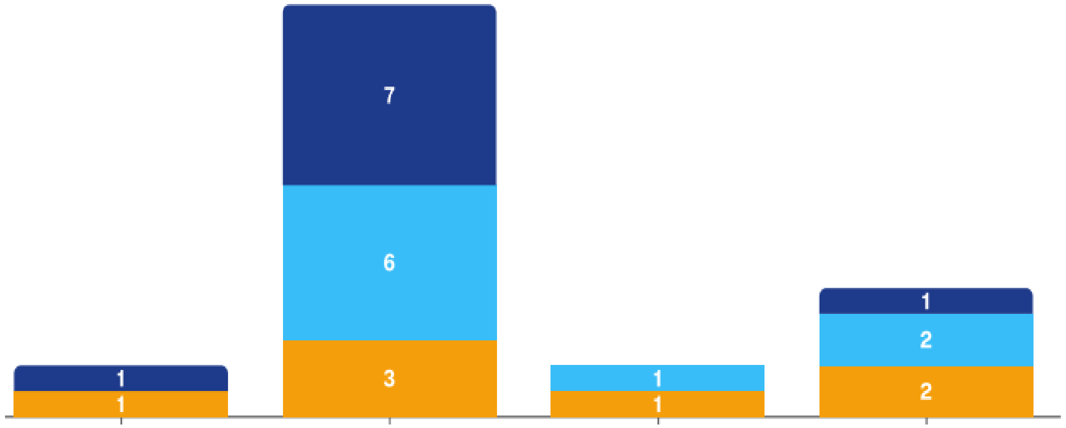
As of June 30, 2026, the Group is ahead of the roadmap defined during the last strategic review

Numerous strategic initiatives

8	+	19	+	12	=	39
Group		LISI AEROSPACE		LISI AUTOMOTIVE		Total

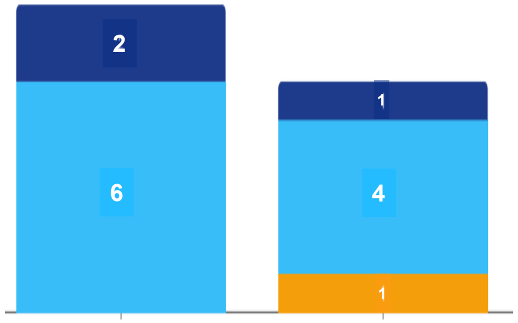
Operational Excellence

Preserve | Perform | Manage | Control



Innovation and Growth

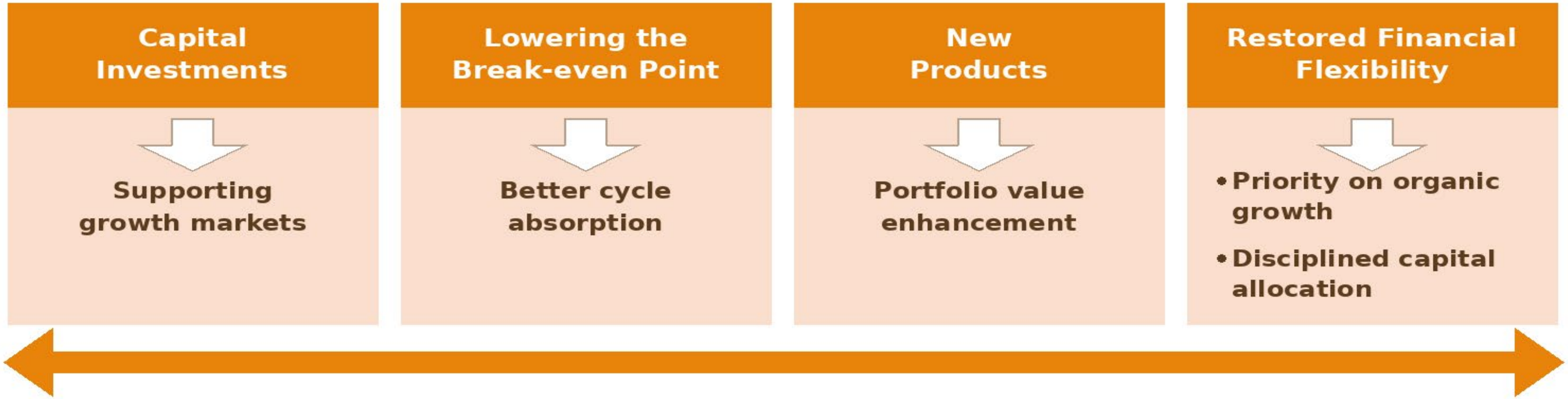
Develop | Innov'



A collective and structured approach to support implementation and performance

Ambitions Remain Unchanged

- Three drivers of growth:
  - ✓ **LISI AEROSPACE**'s Momentum
  - ✓ Repositioning of **LISI AUTOMOTIVE**
  - ✓ Productivity gains
- Priority on organic growth, consolidation of operating gains, and industrial execution
- Caution regarding raw material supplies, inflation, tariffs, and customer inventory adjustments



Conclusion:

Better positioned, more selective, and more flexible, the LISI Group continues on its growth trajectory with disciplined execution and rigorous management over the long term

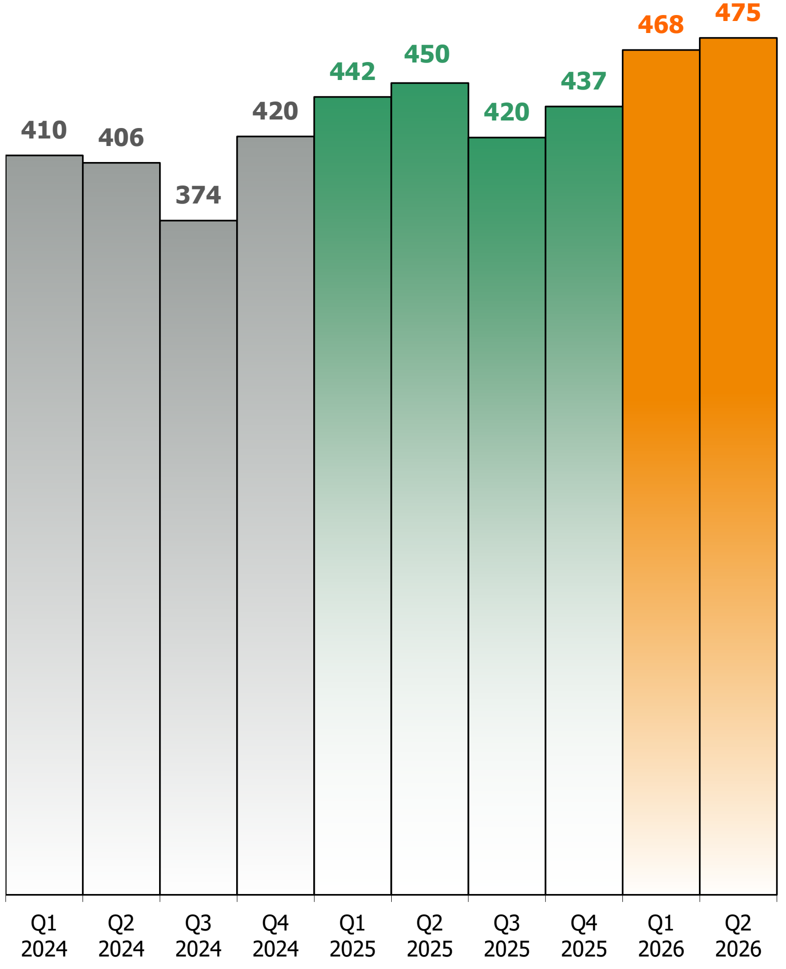
APPENDICES

Revenue by Business Segment

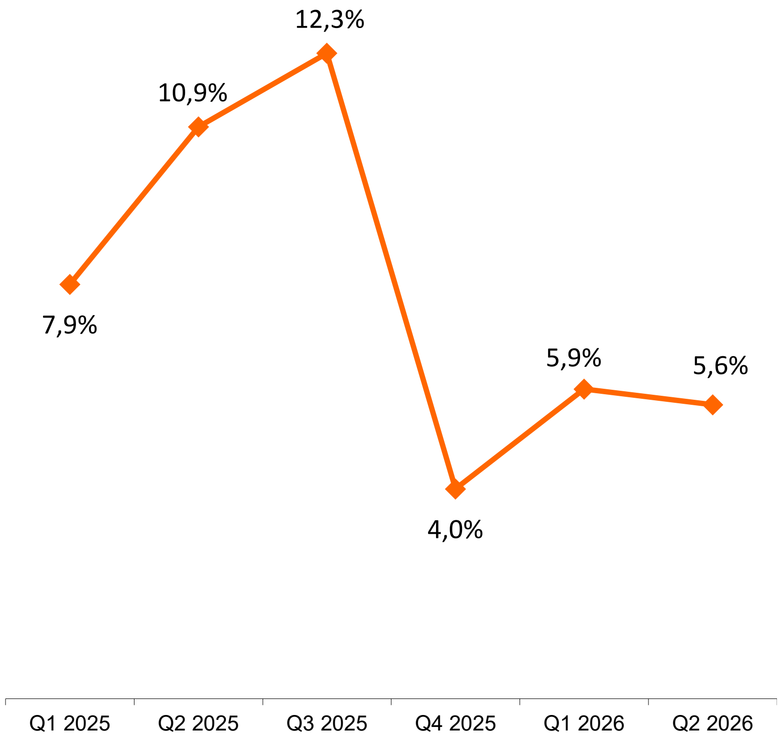
	2026.06		2025.06		NP	PC & $C
	M€	%	M€	%		
LISI AERO FASTENERS EUROPE	283.8	30	256.3	29	10.7%	18.5%
LISI AERO FASTENERS NAM	202.4	21	163.6	18	23.7%	31.0%
LIS AEROSPACE STRUCTURAL COMPONENTS	218.1	23	196.2	22	11.2%	12.2%
LISI AEROSPACE	**663.2**	**70**	**600.8**	**67**	**10.4%**	**15.8%**
LISI AUTOMOTIVE	**279.9**	**30**	**292.1**	**33**	**-4.2%**	**-4.4%**
OTHERS	**11.3**	**1**	**9.6**	**1**	**-**	**-**
ELIMINATIONS	-11.5	**-1**	-10.8	**-1**	-	-
CONSOLIDATED LISI	**942.9**	**100**	**891.7**	**100**	**5.7%**	**9.2%**
FRANCE	*289.1*	*31*	*309.4*	*35*	*-6.6%*	*-7.8%*
OUT OF FRANCE	*653.8*	*69*	*582.2*	*65*	*12.3%*	*18.3%*

2026: Cumulative revenue of 942.9 €M

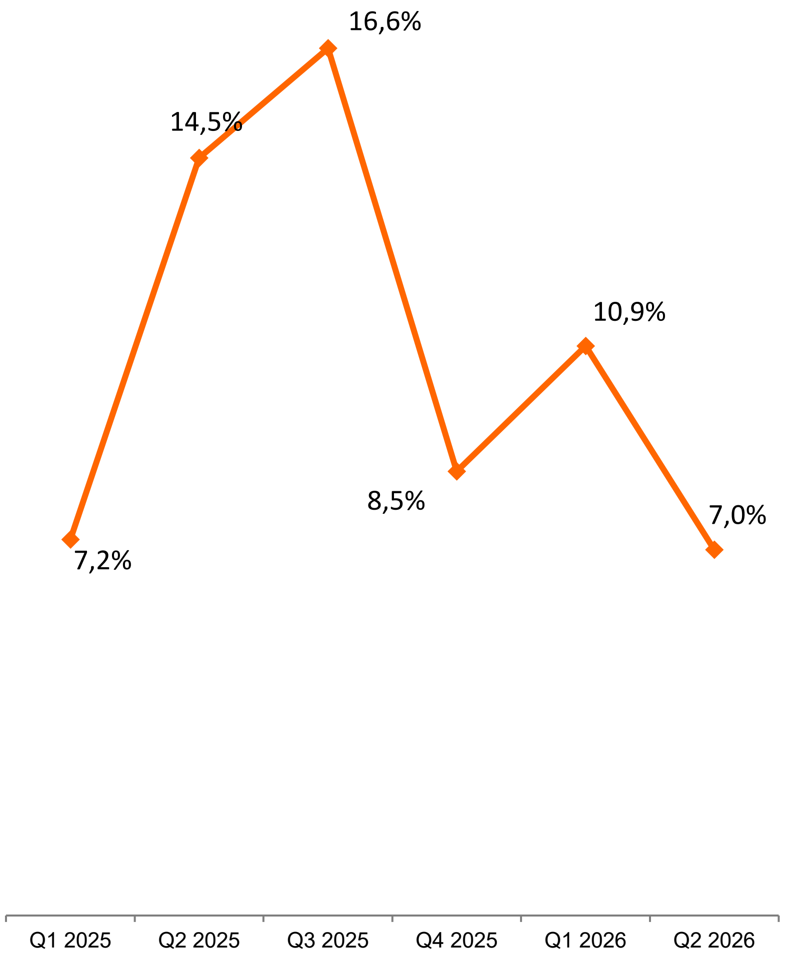
Consolidated quarterly revenue (M€)



Change quarter n/quarter n-1

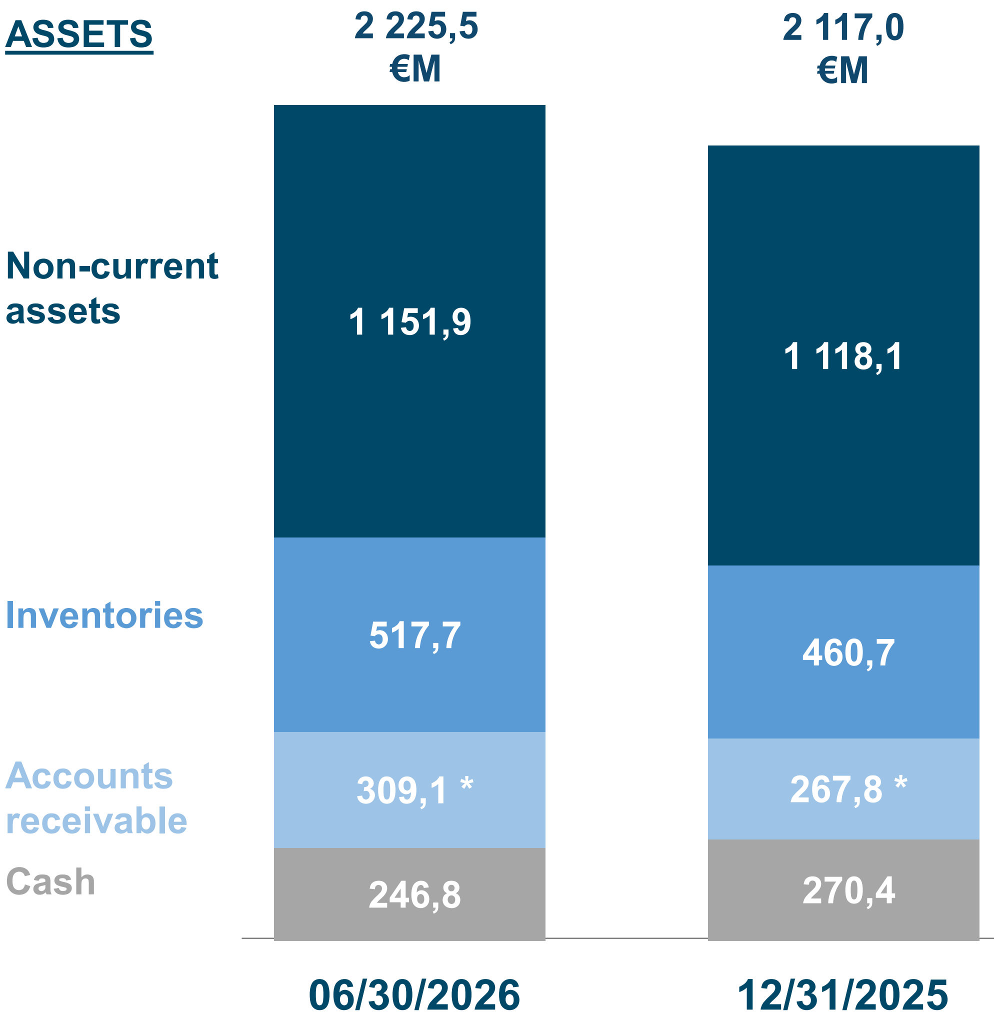


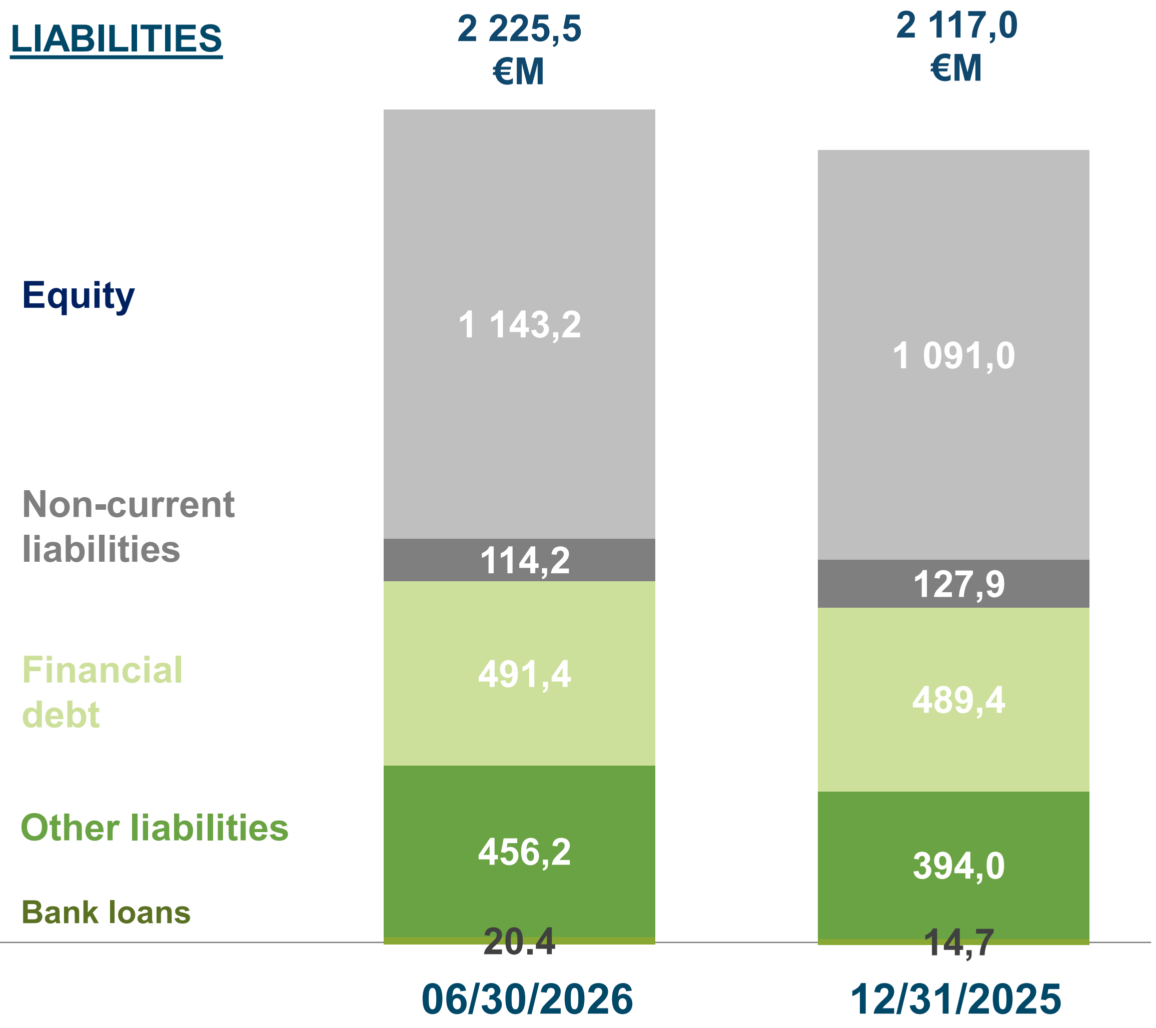
Organic growth



Quarterly revenue for 2025 has been restated to reflect the divestiture of LISI MEDICAL on October 31, 2025

Solid Financial Structure

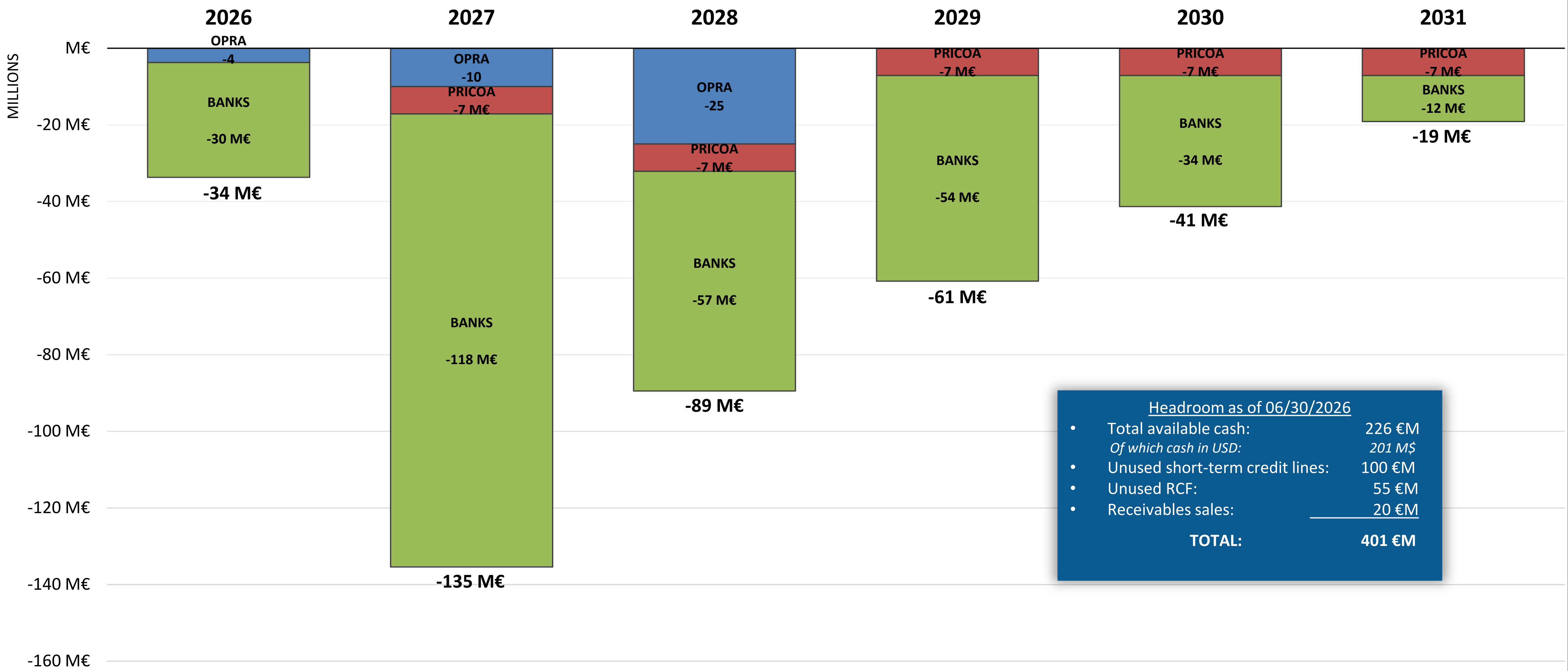




	06/30/2026	12/31/2025
* Sales of receivables	107.9 €M	104.4€M
* of which: Assets held for sale		13.5 €M

	06/30/2026	12/31/2025
Total capital employed	1,408 €M	1,325 €M
** of which: Liabilities directly related to groups of assets held for sale		4.4 €M

Amortization Schedule as of 06/30/2026



Headroom as of 06/30/2026

• Total available cash:	226 €M
Of which cash in USD:	*201 M$*
• Unused short-term credit lines:	100 €M
• Unused RCF:	55 €M
• Receivables sales:	20 €M
TOTAL:	**401 €M**

LISI AEROSPACE

	06/30/2026		06/30/2025		CHANGES
	€M	*% of Revenue*	€M	*% of Revenue*	Y/PY
Revenue	**663.2**		**600.8**		**10.4%**
Production	**688.6**	***103.8%***	**617.1**		**11.6%**
Value Added	**370.0**	***55.8%***	**332.0**	***55.3%***	**11.4%**
Taxes and duties	**-5.4**	***-0.8%***	**-5.3**	***-0.9%***	**2.3%**
Personnel expenses (including temporary employees)	**-242.8**	***-36.6%***	**-224.3**	***-37.3%***	**8.3%**
EBITDA	**121.8**	***18.4%***	**102.5**	***17.1%***	**18.9%**
Depreciation	**-28.3**	***-4.3%***	**-28.3**	***-4.7%***	**0.0%**
Provisions	**3.7**	***0.6%***	**0.2**	***0.0%***	
EBIT	**97.3**	***14.7%***	**74.4**	***12.4%***	**30.7%**
Non-recurring operating income and expenses	**-2.0**	***-0.3%***	**-0.7**	***-0.1%***	
Operating Income	**95.3**	***14.4%***	**73.7**	***12.3%***	**29.3%**
Cash Flow from Operations	**89.1**	***13.4%***	**75.6**	***12.6%***	**17.9%**

LISI AEROSPACE

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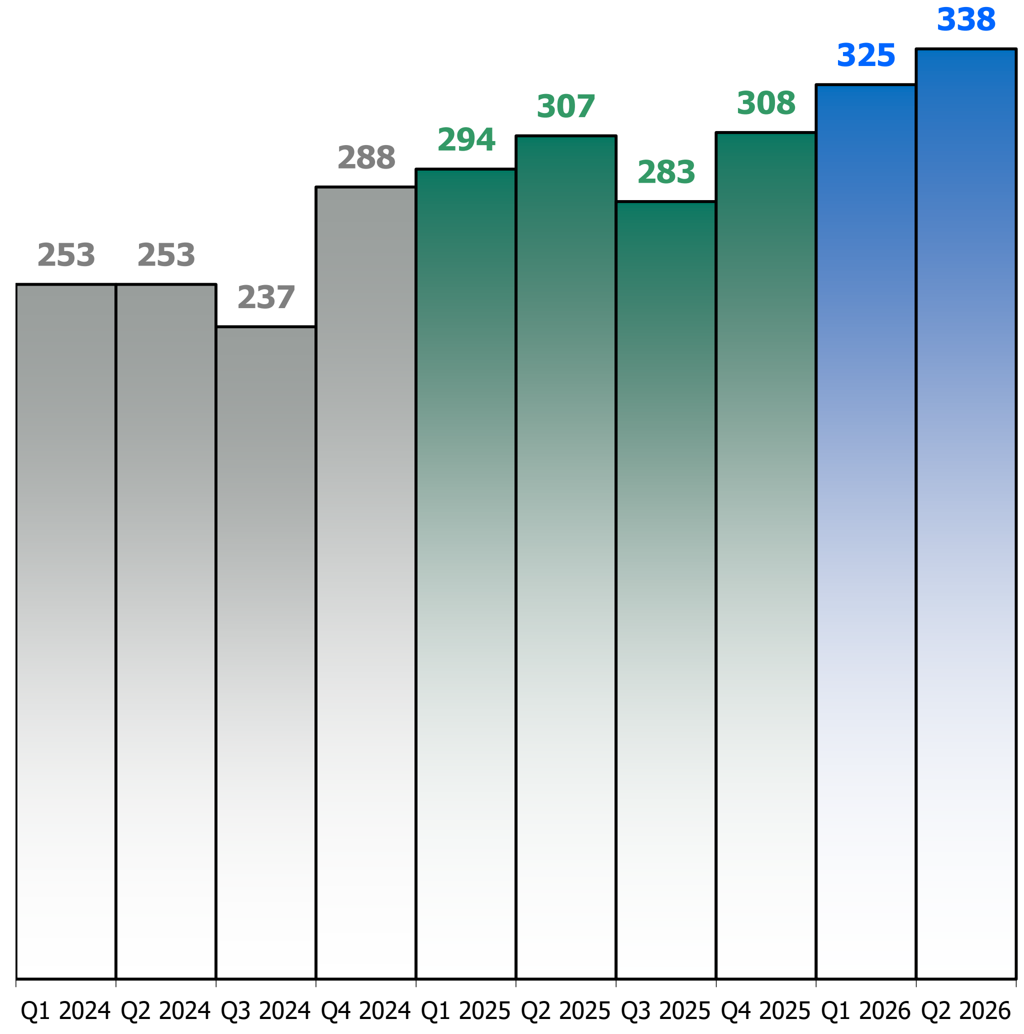
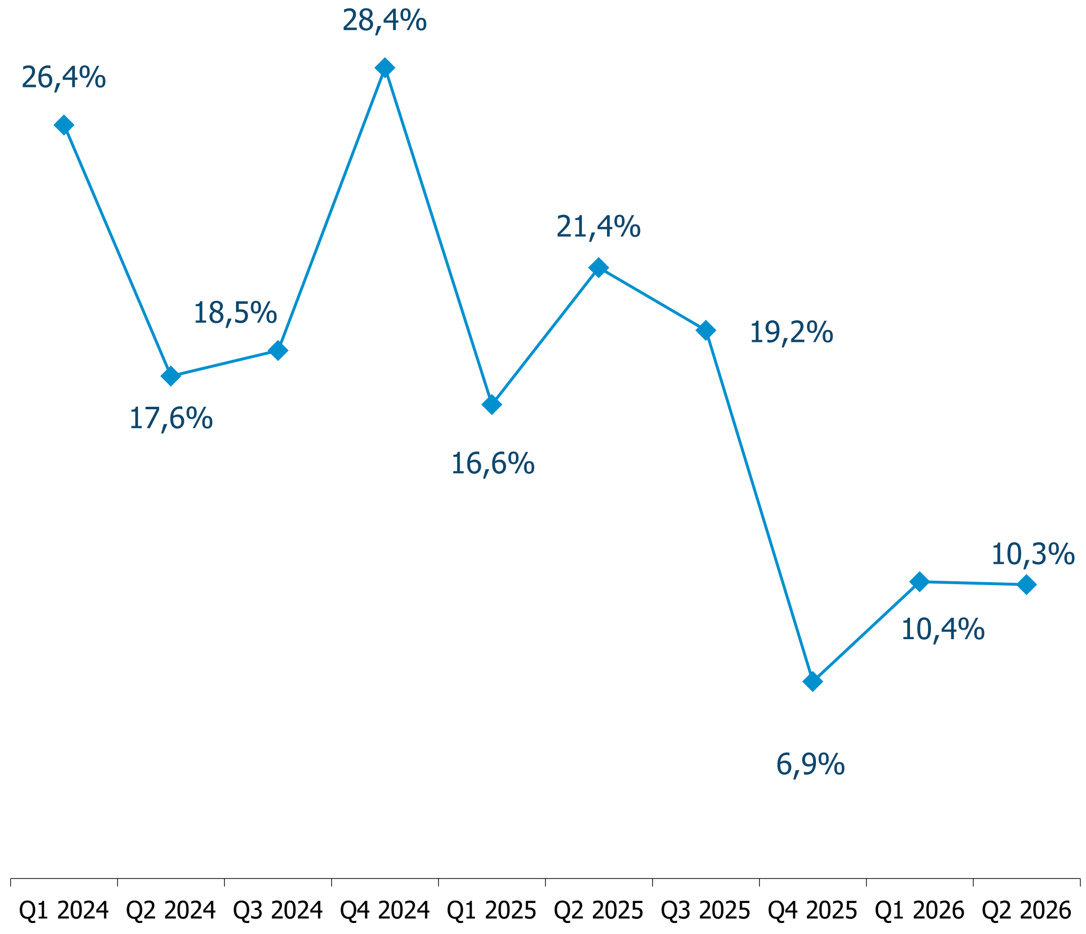
Quarterly Revenue (M€)



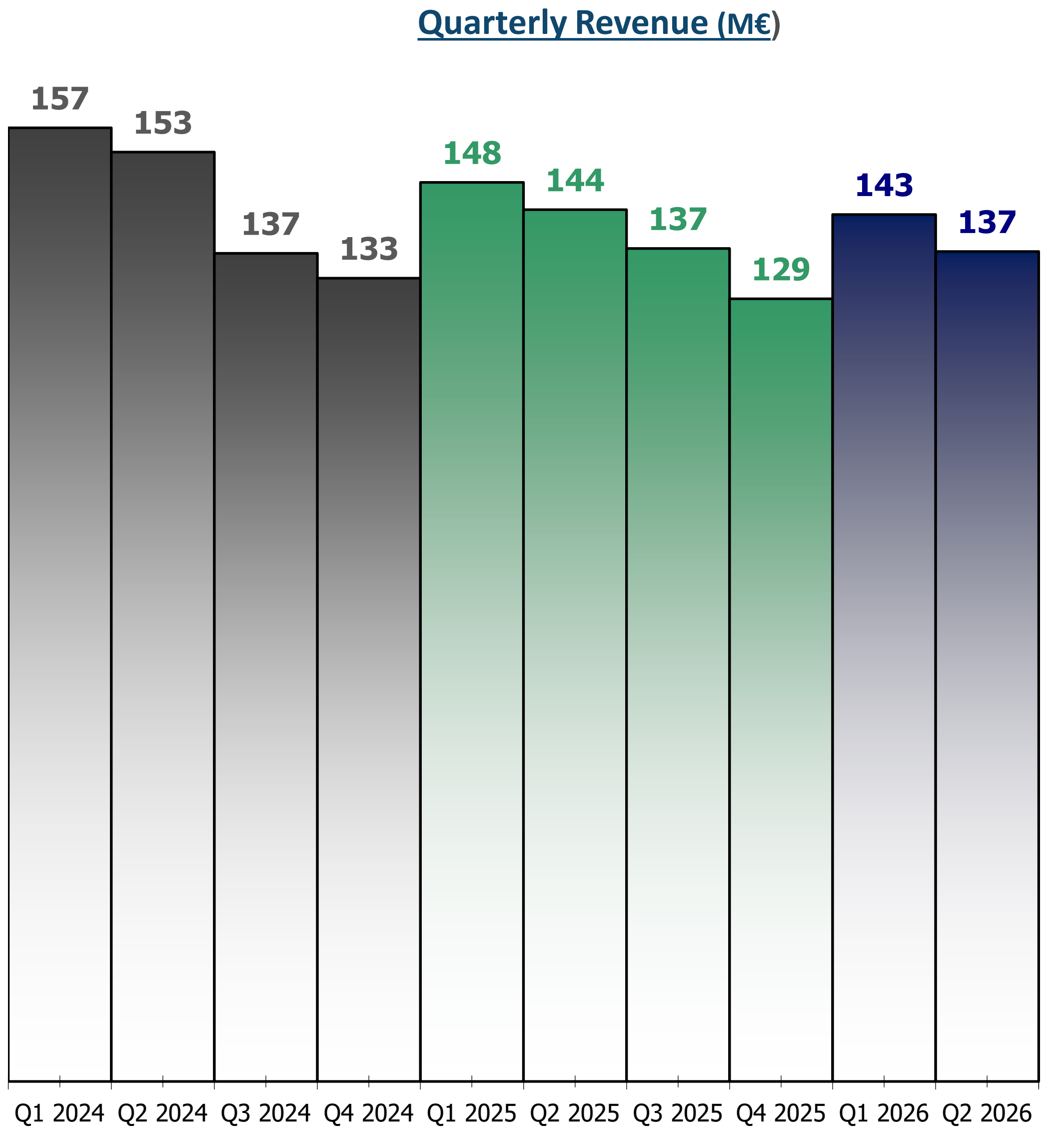
Change quarter n/quarter n-1 at new scope

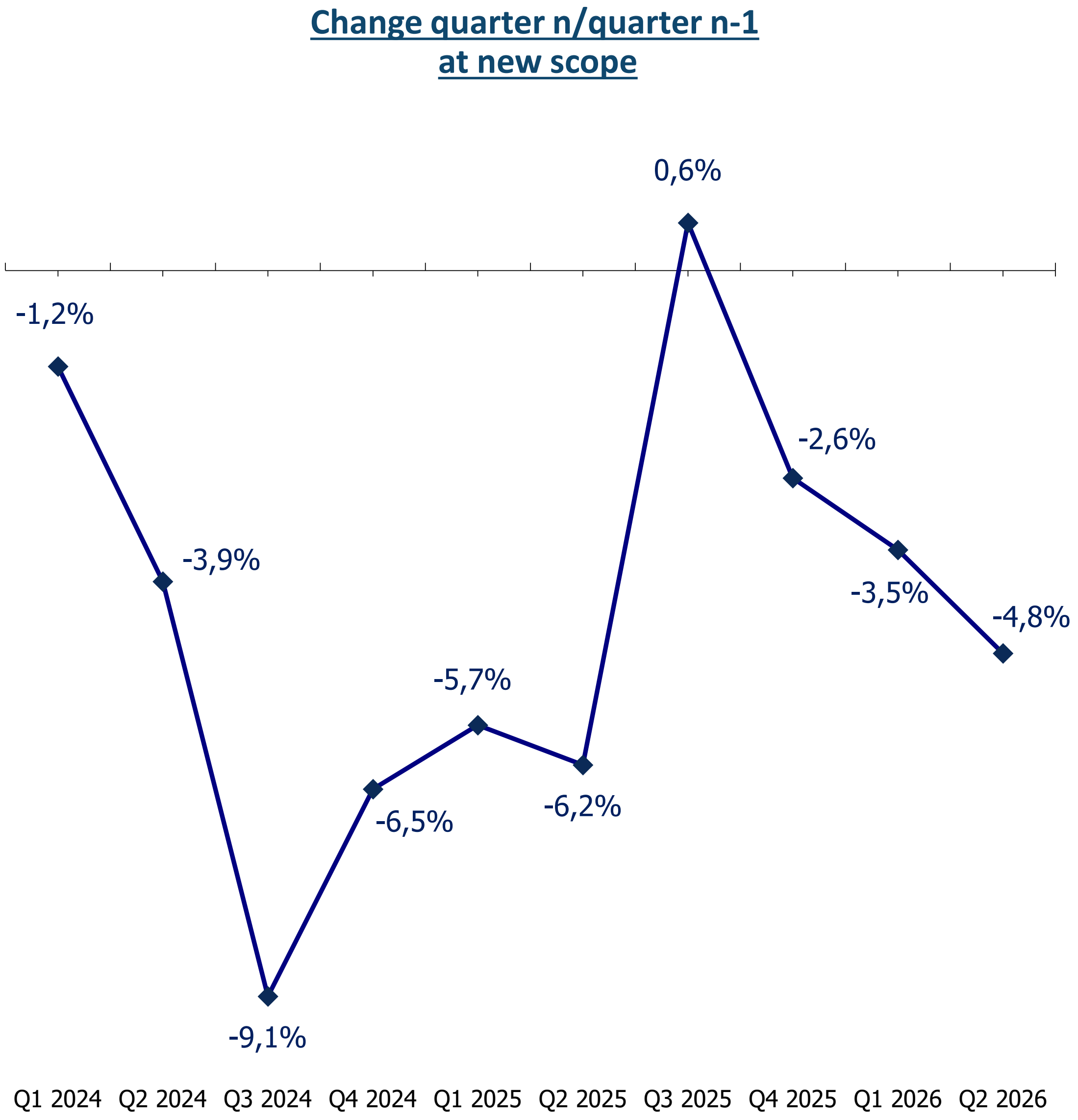


LISI AUTOMOTIVE

	06/30/2026		06/30/2025		CHANGES
	M€	*% of Revenue*	M€	*% of Revenue*	Y/PY
Revenue	**279.9**		**292.1**		**-4.2%**
Production	**282.2**		**290.2**		**-2.7%**
Value Added	**123.6**	***44.2%***	**123.9**	***42.4%***	**-0.2%**
Taxes and duties	**-2.3**	***-0.8%***	**-2.4**	***-0.8%***	**5.9%**
Personnel expenses (including temporary employees)	**-92.3**	***-33.0%***	**-89.2**	***-30.5%***	**-3.6%**
EBITDA	**29.0**	***10.3%***	**32.3**	***11.1%***	**-10.4%**
Depreciation and Amortization	**-17.7**	***-6.3%***	**-17.7**	***-6.1%***	**0.4%**
Provisions	**0.6**	***0.2%***	**-0.3**	***-0.1%***	
EBIT	**11.8**	***4.2%***	**14.3**	***4.9%***	**-17.3%**
Non-recurring operating income and expenses	**-21.1**	***-7.5%***	**-1.4**	***-0.5%***	
Operating Income	**-9.2**	***-3.3%***	**12.8**	***4.4%***	
Cash Flow from Operations	**21.9**	***7.8%***	**21.8**	***7.5%***	**0.4%**

LISI AUTOMOTIVE



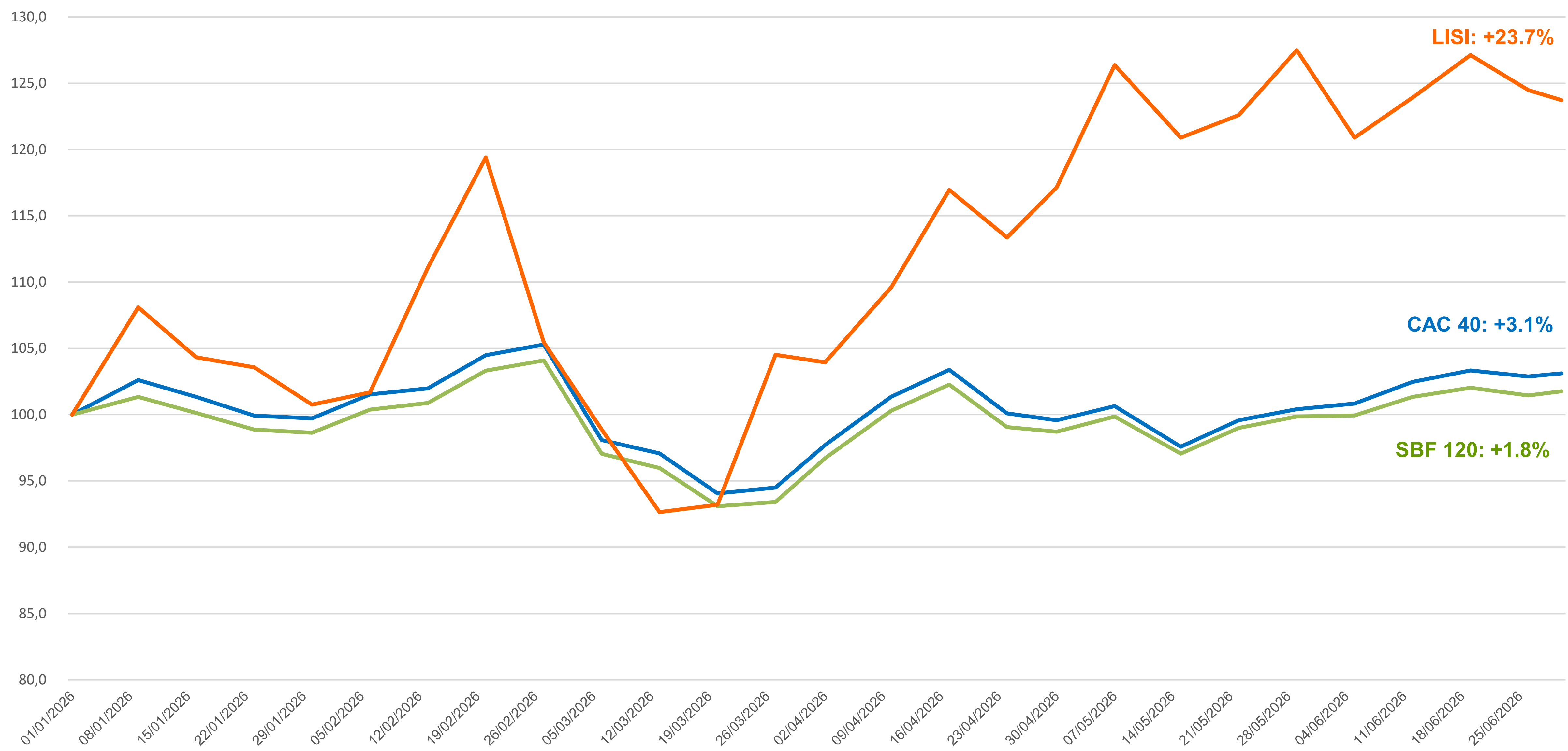


Workforce by Sector of Activity

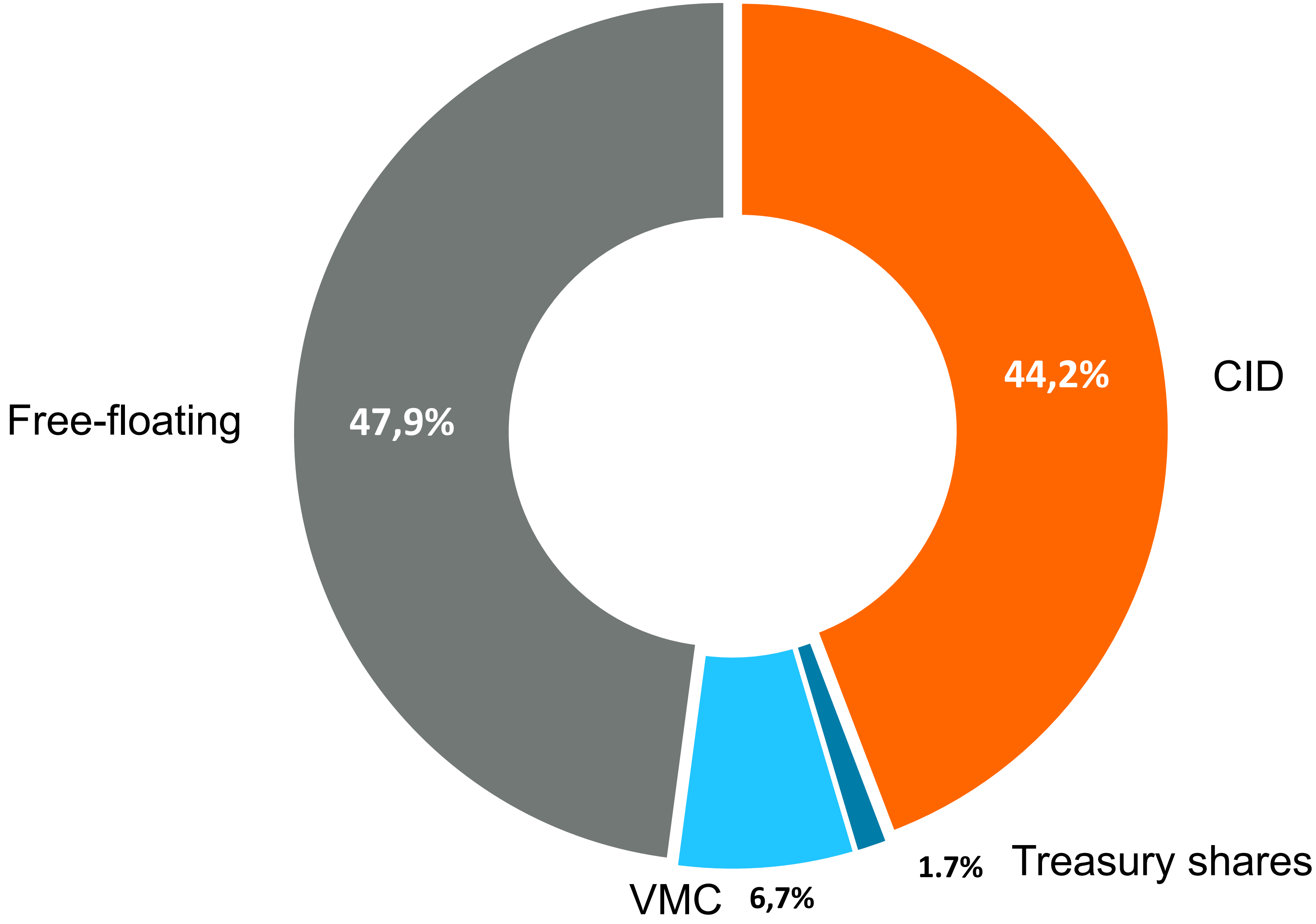
	Registered at End of Period			Full-time equivalent*		
	06/30/26	06/30/25	12/31/25	06/30/26	06/30/25	12/31/25
LISI AEROSPACE	6,475	6,474	6,630	7,229	7,195	7,277
LISI AUTOMOTIVE	2,882	2,844	2,907	3,057	2,930	2,975
LISI MEDICAL	-	792	-	-	843	704
OTHER	98	96	97	95	92	92
TOTAL	9,455	10,206	9,634	10,381	11,059	11,048
TEMPORARY STAFF	1,226	1,157	1,060	1,019	1,019	1,037

** Including temporary workers*

Share price performance in 2026



Shareholder Structure as of 06/30/2026



Number of shares: 46,538,313