

DEEP DIVE

FINANCIALS AND OUTLOOK

SCAYLE

TOBIAS
RING

MANAGING DIRECTOR
COMMERCIALS

Ambitious FY 28/29 revenue and adjusted EBITDA targets

30%
CAGR¹

~EUR 175M

Revenue in FY 28/29E

EUR 47M

Revenue in FY 23/24

25%
CAGR¹

~EUR 75M

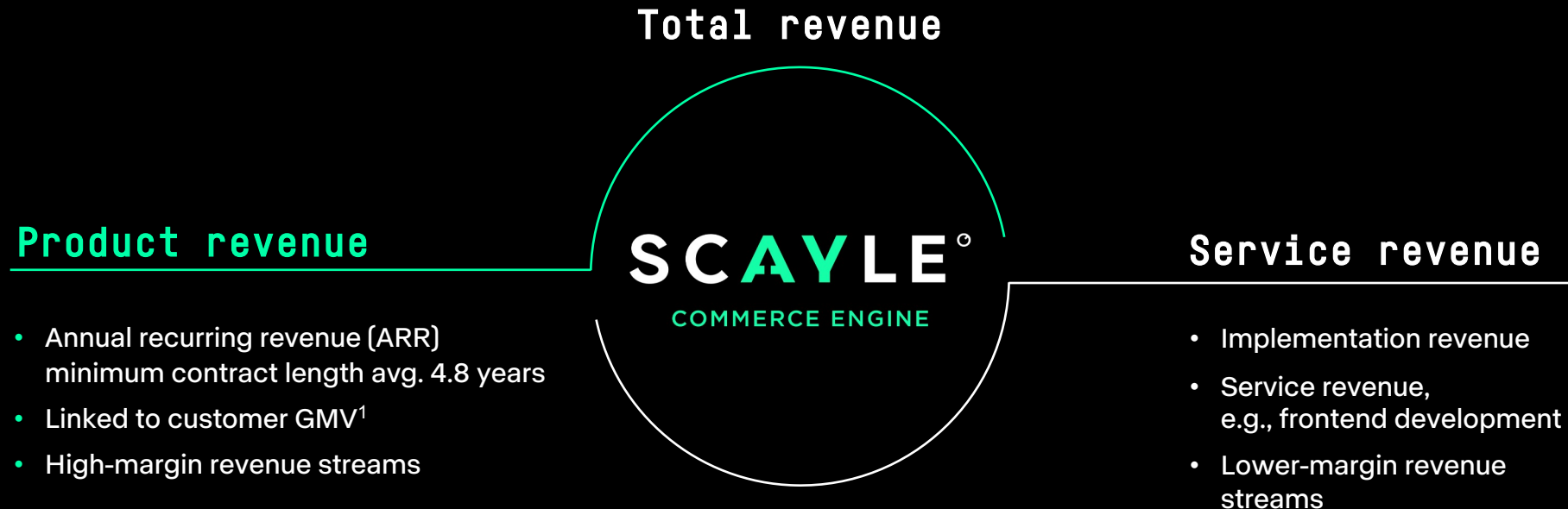
Adjusted EBITDA in FY 28/29E

EUR 25M

Adjusted EBITDA in FY 23/24

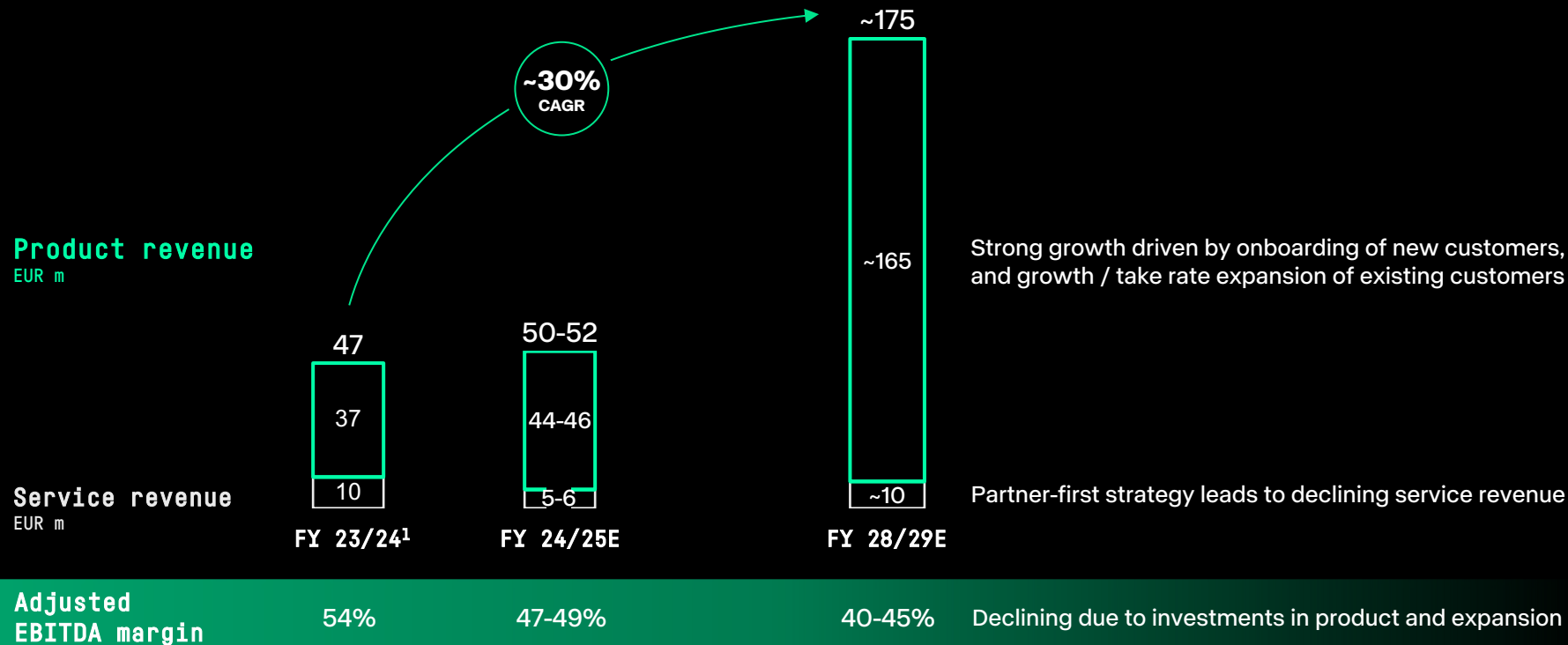
1. CAGR is defined as Compound Annual Growth Rate for FY 23/24–28/29

SCAYLE has two distinct revenue streams



1. GMV is defined as Gross Merchandise Value prior reduction of returns but excluding VAT

Strong growth of product revenue reflects focus on high-margin revenue streams



1. Based on the IFRS statements of the newly formed SCAYLE GmbH in FY 23/24; no statements are available for previous years due to the recent formation of legal entity

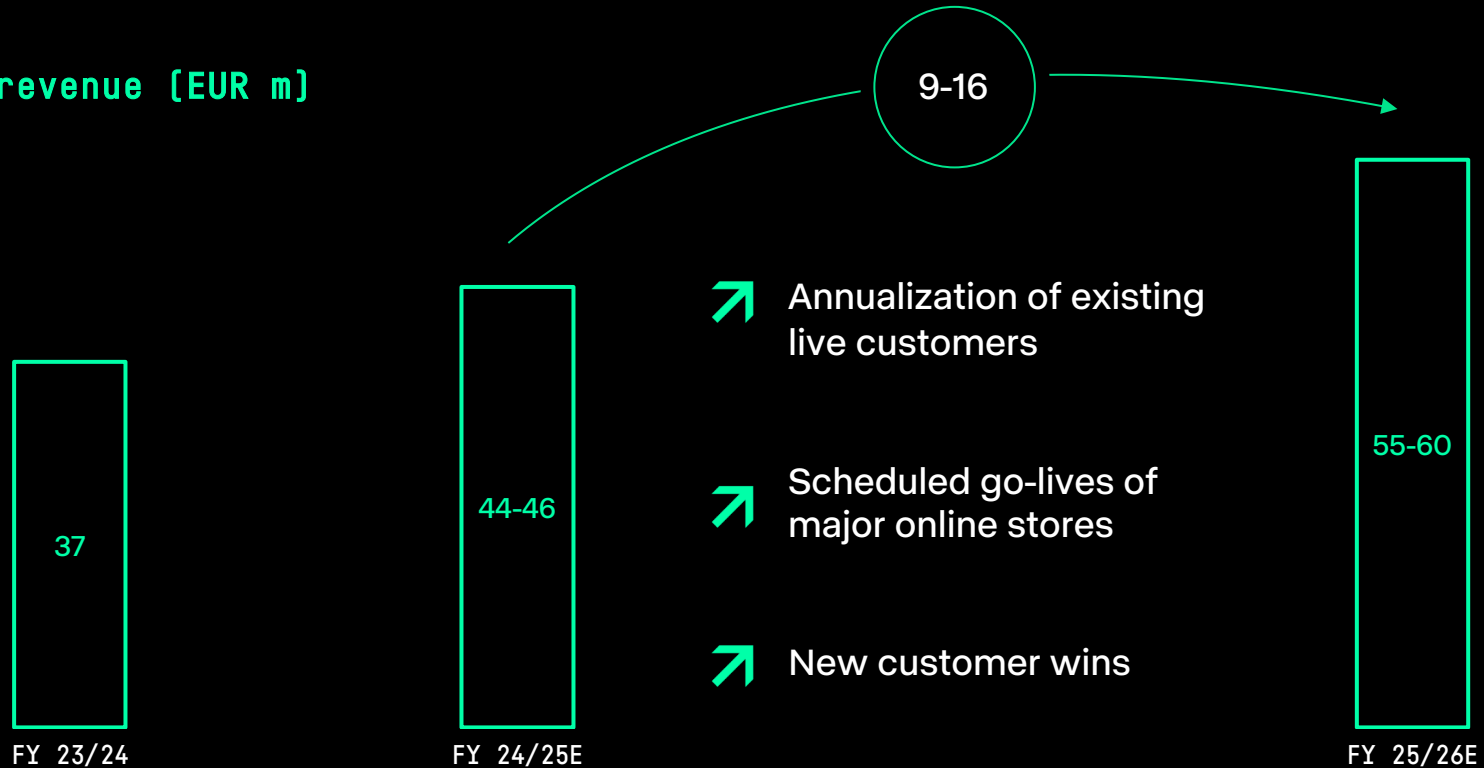
Growth is fueled by geographic expansion



Note: Numbers refer to SCAYLE revenue (EUR m)

High visibility into product revenue growth FY 25/26E

Product revenue [EUR m]



Note: Numbers refer to ARR, defined as Annual Recurring Revenue in (EUR m) | Realization of outlined revenue uplift is subject to development of customers, Go-Lives according to current project timelines and customer acquisition

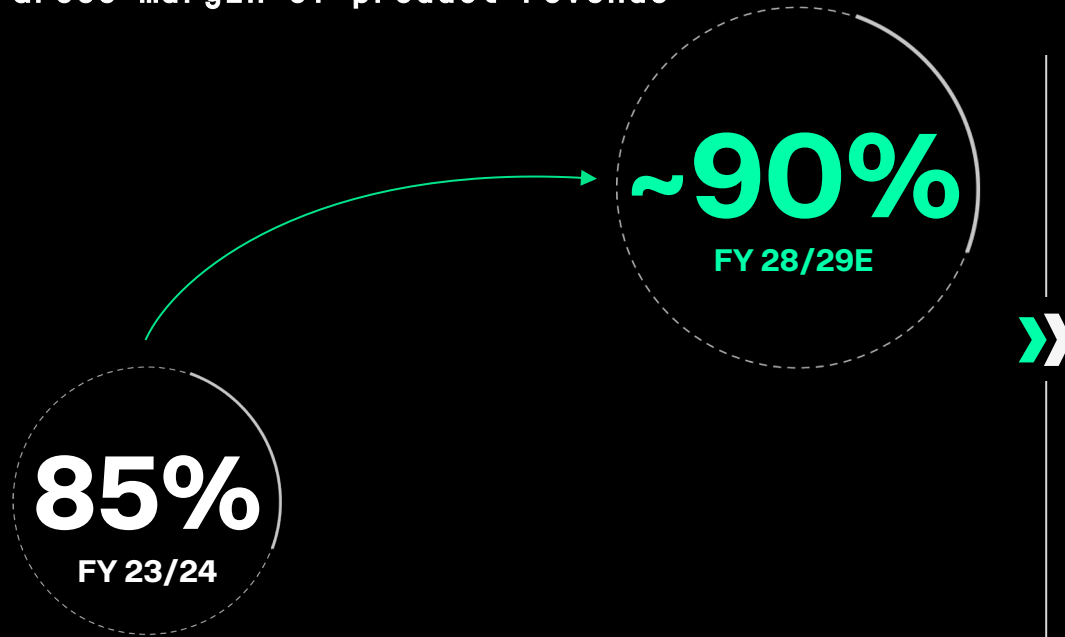
Shape of SCAYLE P&L including service revenues

		FY 23/24 [% of revenue]	FY 28/29E [% of revenue]
	GROSS MARGIN THEREOF PRODUCT GROSS MARGIN	79% 85%	~85% ~90%
—	OPEX	25%	~42%
=	ADJUSTED EBITDA MARGIN	54%	~43%
	REPORTED EBITDA MARGIN	48%	~40%
	REPORTED EBIT MARGIN	30%	~30%

Note: Cost lines are based on management accounts

Measures initiated to optimize gross margin towards 90%

Gross margin of product revenue

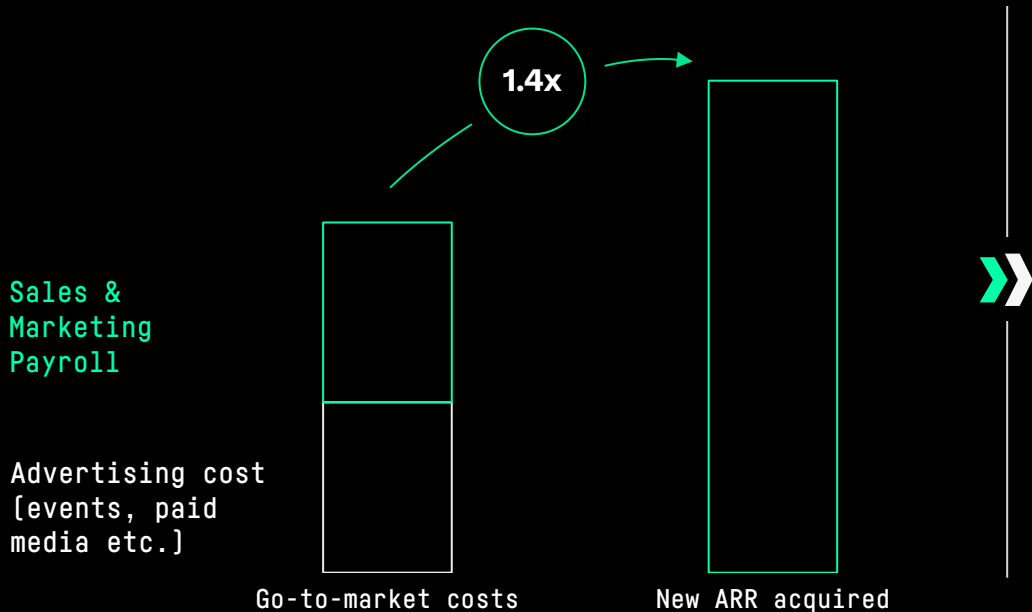


- Optimization of multi-tenancy infrastructure use for smaller customers
- Application optimizations for more efficient infrastructure use
- Economies of scale support realization of better discounts with hyperscalers

Note: Expected Gross Margins are based on similar take rates as secured in FY23/24

Highly efficient go-to-market approach

Go-to-market efficiency in FY 23/24 [illustrative]



- High productivity of quote carrying sales reps (>EUR 1m ARR per rep)
- Targeted advertising to large accounts and presence at most relevant events
- Going forward: Efficiency is expected to decline due to investments into new geographies

Achieved outstanding business results in FY 23/24

>30%

ARR growth

>EUR 3.8BN

External Gross transaction
volume powered

~130%

Net revenue retention rate¹

0%

Customer churn

1.4x

Magic number²

1. Defined as net revenue generated of live clients in FY 22/23 vs. FY 23/24; 2. Defined as ratio of new ARR acquired / go-to-market costs

Adjusted EBITDA increase drives free cash flow growth

		FY 23/24 [% of revenue]	FY 28/29E [% of revenue]
	ADJUSTED EBITDA	25	~75
—	CAPEX	~15	~15
±/—	NET WORKING CAPITAL	Neutral ¹	Neutral
=	FREE CASH FLOW	10	~60

1. Adjusted for carve-out and other one-time effects

**We aim for SCAYLE to become a
separate reporting segment in FY 25/26
to further increase transparency**

SCAYLE generates superior returns until FY 28/29

~30%

CAGR

Strong top-line momentum
expected (~30% CAGR
FY 23/24 to FY 28/29E)

~90%

PRODUCT GROSS MARGIN

Superior gross margin of 85%
expected to rise even further
towards 90% (FY 28/29E)

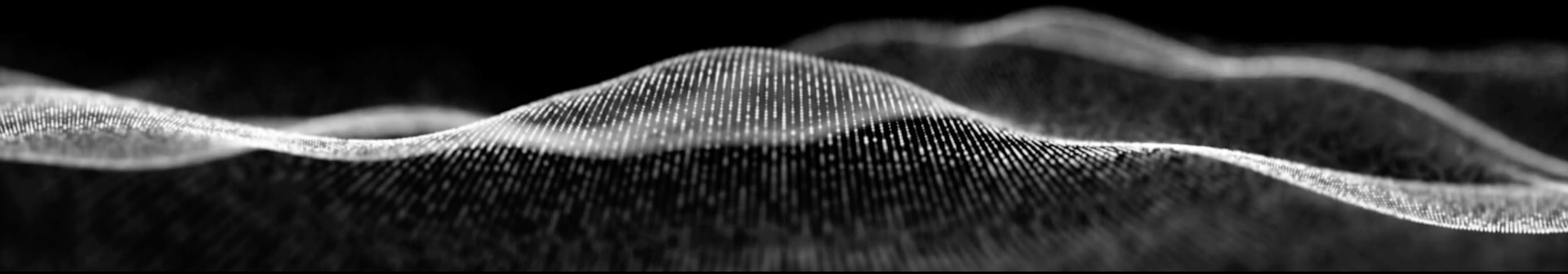
40-45%

ADJUSTED EBITDA MARGIN

Adjusted EBITDA margin
anticipated 40-45% (FY 28/29E)
despite growth investments



CAPITAL MARKETS
EVENT 2024



Disclaimer (1/2)

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