

Strong results
& 18% growth



Interim report
Q3 2014

ADDNODE GROUP

Agenda

- Summary of Q3
- Financial performance
- The operation
- Acquisitions

Summary, Q3 2014

- Net sales amounted to SEK 354.5 M (301.4), up 18 percent.
- EBITA rose to SEK 34.0 M (14.4), an EBITA margin of 9.6 percent (4.8).¹⁾
- 49 percentage of net sales comes from recurring revenue.
- Earnings per share after dilution rose to SEK 0.64 (0.03).

- Renewed agreement with Statoil – order value of SEK 90 M over a three-year period.
- Acquired 37% of the company Kompanion – SaaS planning tool for home-help service.

1) Excluding non-recurring costs of SEK 0.0 M (5.5) for organizational changes and costs for the revaluation of conditional purchase considerations of SEK 0.0 M (0.2).

Financial performance, Q3 2014

ADDNODE GROUP

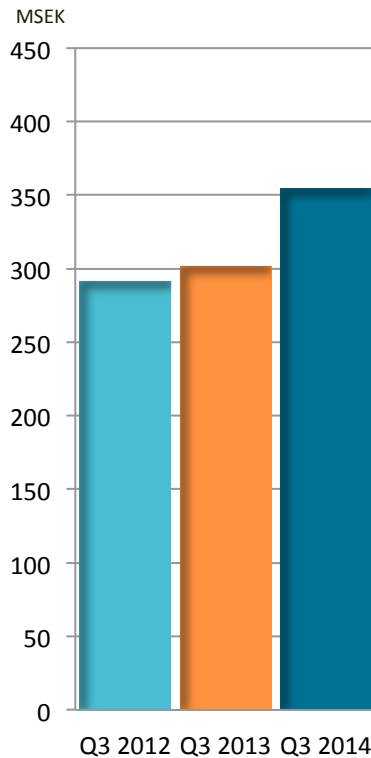


Q3 2014

- Strong results and 18% growth

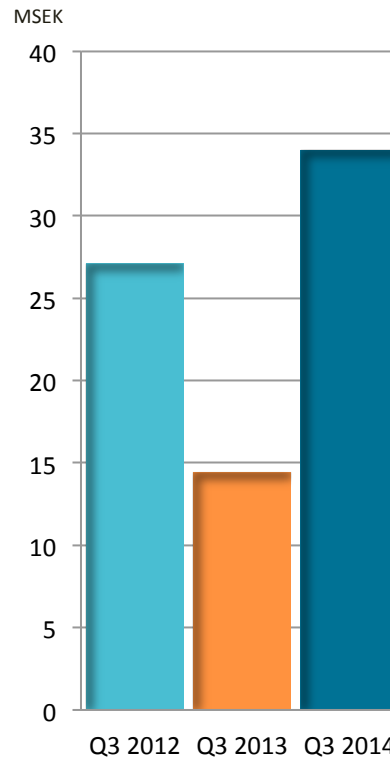
Net Sales

+ 18 percent



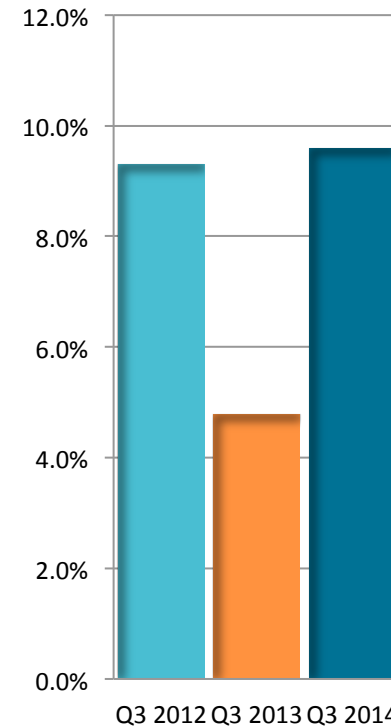
EBITA*

+236 percent



EBITA-margin

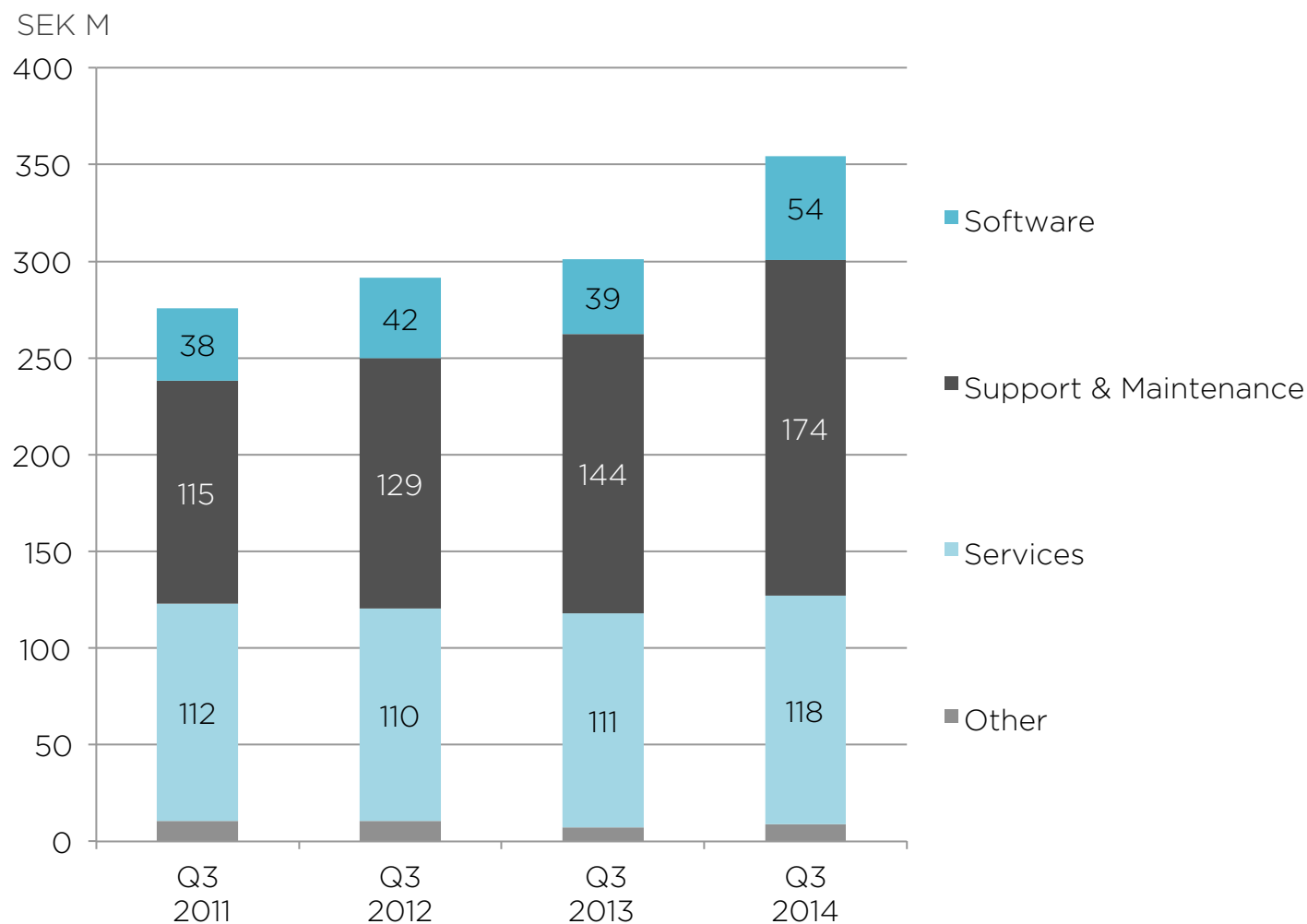
9,6 percent



*Excluding capital gains and cost for the revaluation of the conditional purchase considerations and non-recurring costs associated with management changes.

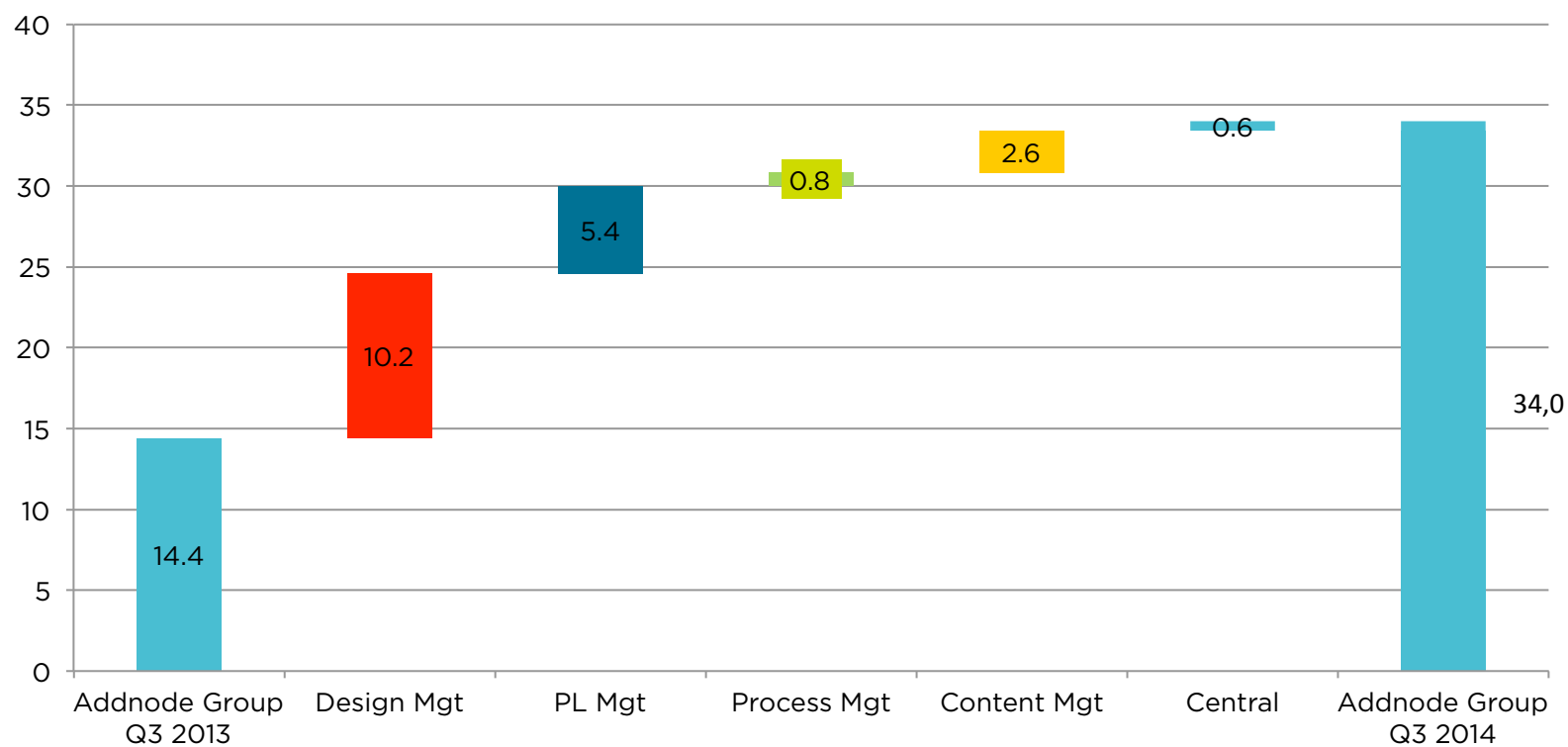
Net sales

Growth & earnings distribution, Q3 2011 – Q3 2014



Changes in EBITA

Q3 2014 vs Q3 2013



1) Excluding non-recurring costs of SEK -5.5 million for organizational changes and revaluation of contingent consideration -0.2 million.

Strong balance sheet and cash flow

SEK **48**_M

Cash

2014-09-30

SEK **56**_M

Cash flow from

operating activities

Jan – Sep 2014

SEK **40**_M

Net debt

2014-09-30

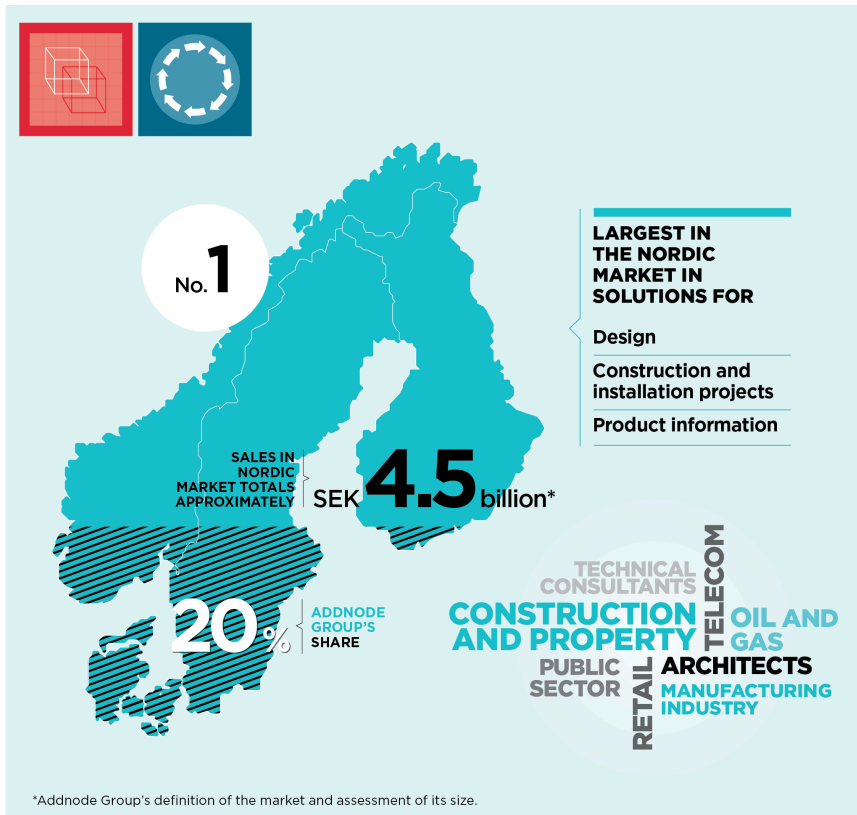
58%

Equity/Assets ratio

2014-09-30

The operation

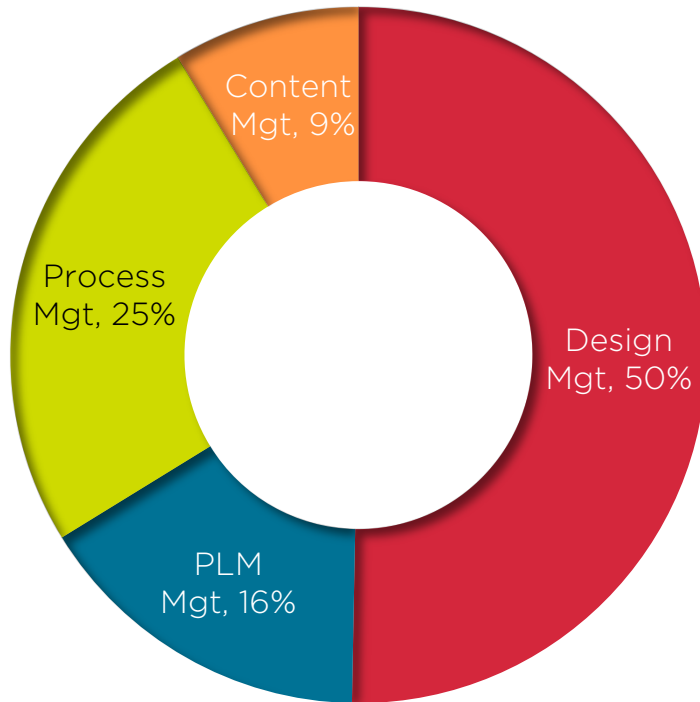
We focus on developing the areas, processes, and markets in which we contribute to the development of our customers and receive maximum return on our own expertise. Quite simply, we do what we are best at.



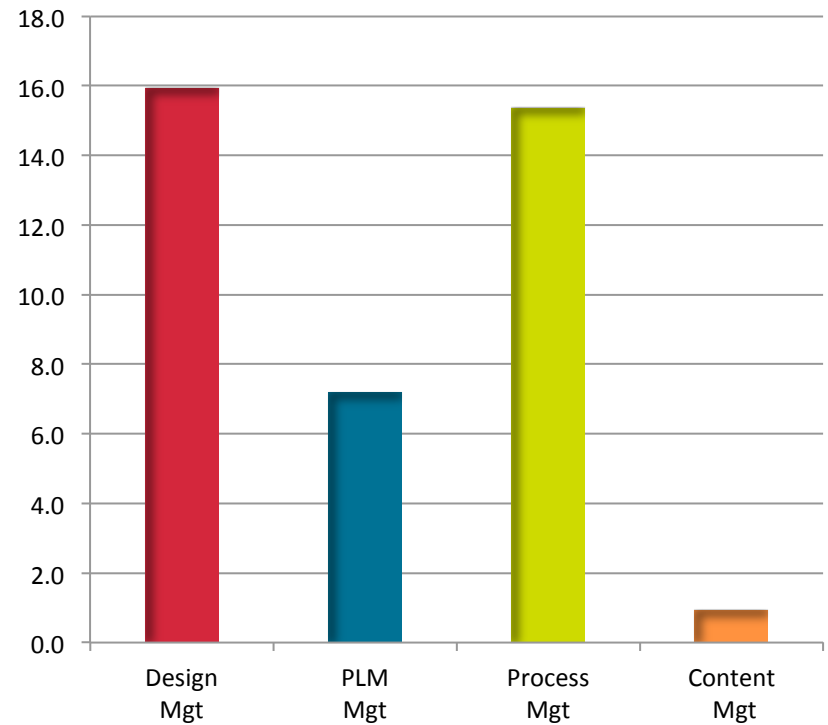
Net sales and EBITA

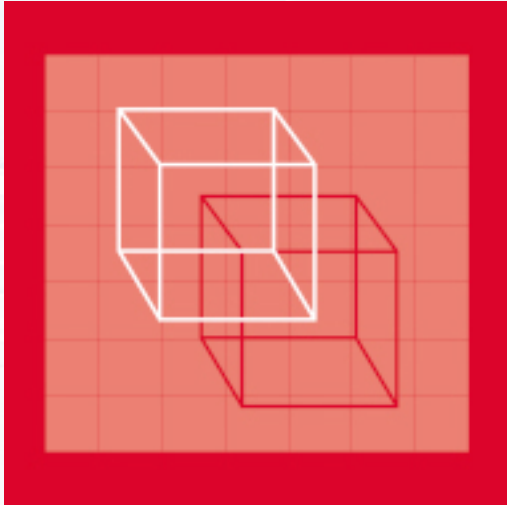
By business area, Q3 2014

Net sales



EBITA



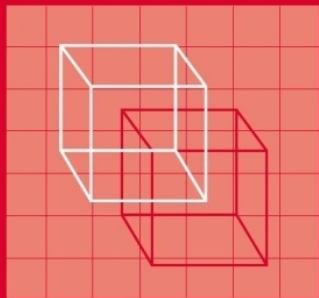


DESIGN MANAGEMENT

Nordic leading supplier

IT-solutions for design and engineering.

**DESIGN
MANAGEMENT**



CAD-Q

ADDNODE GROUP

SYMETRI

ADDNODE GROUP

JOINT COLLABORATION

ADDNODE GROUP

Number 1 Nordic supplier

IT solutions for design and engineering.

Shares of net sales

50%

Share of EBITA before
central costs

40%

	Q3 2014	Q3 2013	Jan - sep 2014	Jan - sep 2013
Net sales	180.4	137.3	550.3	445.1
Growth	31.4%	10%	23.6%	9%
EBITA	15,9	5.7 ¹	43.3	28.5 ¹⁾
EBITA-margin	8.8%	4.2%	7.9%	6.4%
Average number of employees	314	258	302	238

1) Excluding non-recurring costs of SEK 1.3 M for organizational changes in Denmark.



PLM MANAGEMENT

Nordic leading supplier

IT-solutions for product information.

**PRODUCT
LIFECYCLE
MANAGEMENT**

Nordic leading supplier IT-solutions for product information.



Shares of net sales

16%

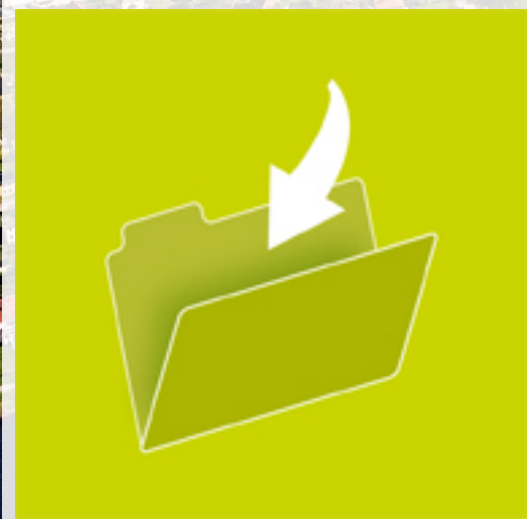
Share of EBITA before
central costs

18%

TECHNIA
ADDNODE GROUP

INFUSEIT
ADDNODE GROUP

	Q3 2014	Q3 2013	Jan- sep 2014	Jan - sep 2013
Net sales	57.1	49.0	188.2	175.3
Growth	17%	-6%	7.4%	-1%
EBITA	7.2	1.8	23.5	9.3
EBITA-margin	12.6%	3.7%	12.5%	5.3%
Average number of employees	165	167	164	138



PROCESS MANAGEMENT

Leading position in Sweden

IT solutions for document and case management within municipal administration and agencies.

**PROCESS
MANAGEMENT**



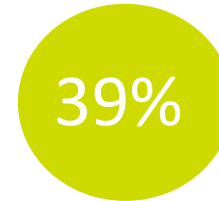
Leading position in Sweden

IT-solutions for document and case management, e-archives and geographic IT systems.

Shares of net sales



Share of EBITA before central costs



ABOU
ADDNODE GROUP

ARKIVA
ADDNODE GROUP

CARTESIA
ADDNODE GROUP

DECERNO
ADDNODE GROUP

IDA INFRONT
ADDNODE GROUP

KARTENA
ADDNODE GROUP

MITTBYGGE
ADDNODE GROUP

PROSILIA
ADDNODE GROUP

TEKIS
ADDNODE GROUP

	Q3 2014	Q3 2013	Jan- sep 2014	Jan- sep 2013
Net sales	90,0	86,9	307,6	291,2
Growth	4%	12%	5,6%	10%
EBITA	15,4	14,6	46,7	51,9
EBITA-margin	17,1%	16,8%	15,2%	17,8%
Average number of employees	273	275	276	265



CONTENT MANAGEMENT

Leading position in Sweden

IT solutions for public websites, collaboration solutions, intranets and systems for e-commerce.

CONTENT MANAGEMENT



MOGUL

ADDNODE GROUP

VOICE PROVIDER

ADDNODE GROUP

Leading position in Sweden

IT solutions for public websites, collaboration solutions, intranets and systems for e-commerce.

Shares of net sales

9%

Share of EBITA before
central costs

2%

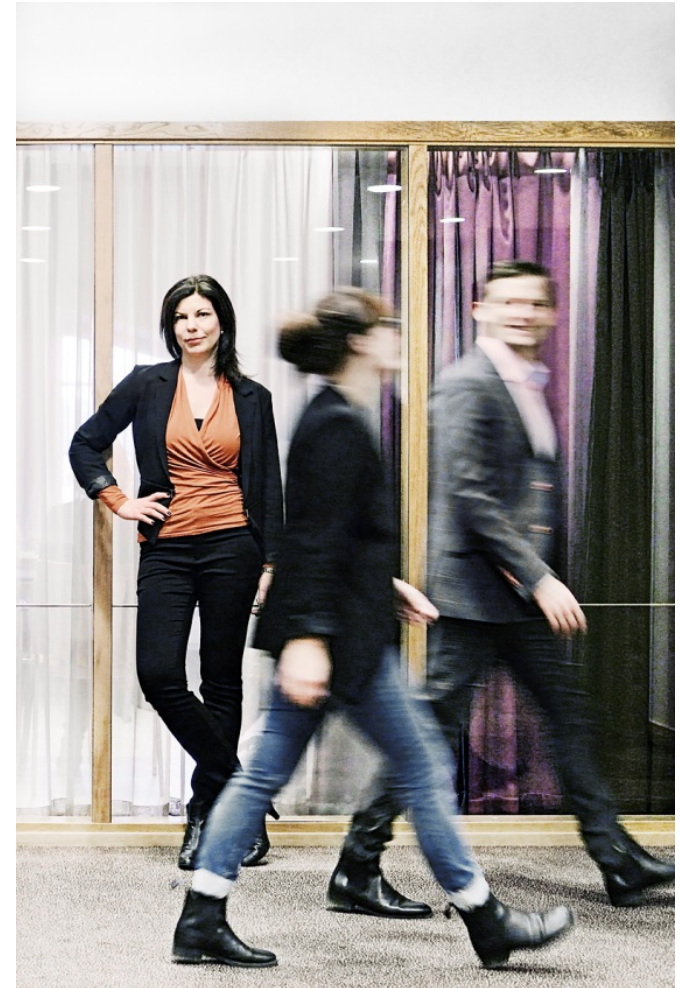
	Q3 2014	Q3 2013	Jan- sep 2014	Jan- sep 2013
Net sales	31.1	32.6	106.1	111.9
Growth	neg	neg	neg	neg
EBITA	0.9	-1.7 ¹⁾	1.5	-6.4 ¹⁾
EBITA-margin	0.5%	-5.2%	1.4%	-5.7%
Average number of employees	137	169	142	173

1) Excluding non-recurring costs of SEK 4,5 M

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Questions?

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ABOU

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