

ADDNODE GROUP

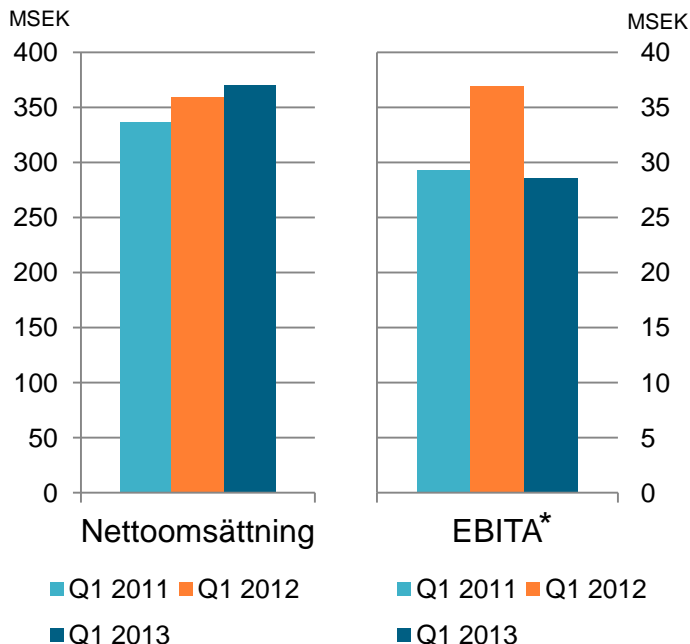


Interim Report Q1 2013

Q1 2013

INCREASE IN NET SALES AND STRONG CASH FLOW

- Net sales totaled SEK 370.7 (358.9) M, up 3 percent.
- EBITA amounted to SEK 28.6 (36.9) M, and EBITA-margin of 7.7 (10.3) percent. ¹⁾



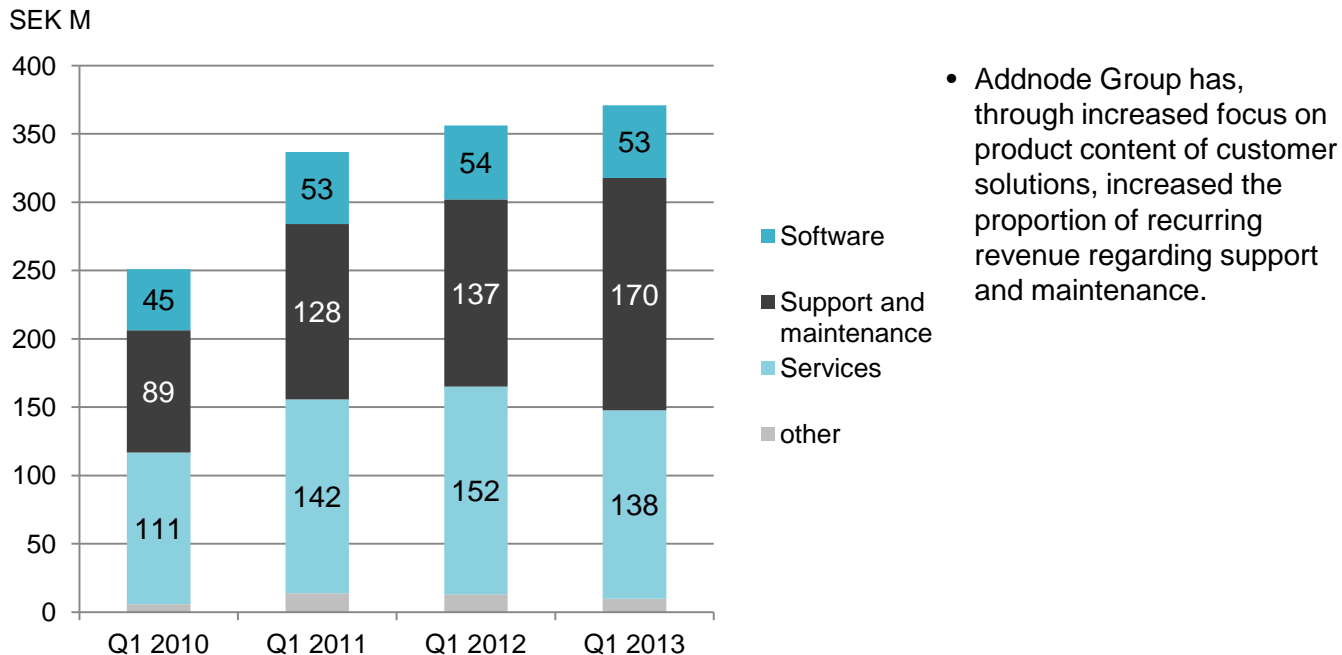
¹⁾ Excluding cost for the revaluation of the conditional purchase considerations totaling SEK 0.0 (-1.9) M.

*Excluding capital gains and cost for the revaluation of the conditional purchase considerations

SIGNIFICANT EVENTS DURING THE FIRST QUARTER OF 2013

- Exclusive cooperation agreement with ÅF regarding software and services.
- Acquisition of Abou, market leaders of e-services to municipalities.
- The Board proposes an unchanged dividend of SEK 2.25 (2.25) per share.

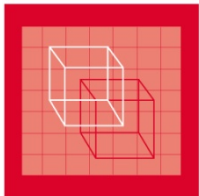
GROWTH AND EARNINGS DISTRIBUTION, Q1 2010 – Q1 2013



FOUR BUSINESS AREAS

A strong and comprehensive Group of high performance IT companies with leading positions in selected markets.

DESIGN MANAGEMENT



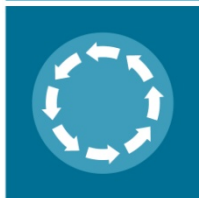
IT solutions for the creation and management of digital design models and drawings.

PROCESS MANAGEMENT



IT solutions for case management, municipal administration, e-archives and geographic IT system.

PRODUCT LIFECYCLE MANAGEMENT



IT solutions for managing product information throughout a product's lifecycle.

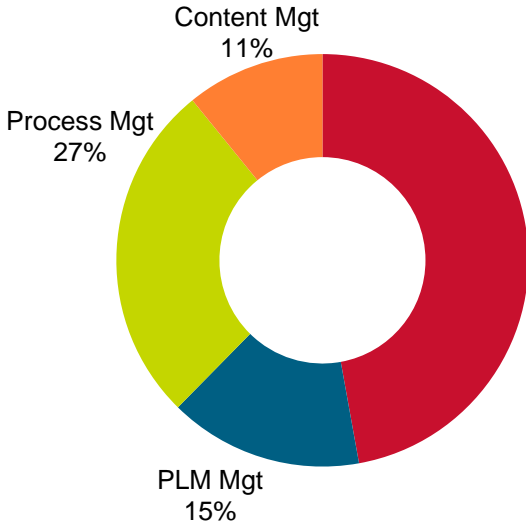
CONTENT MANAGEMENT



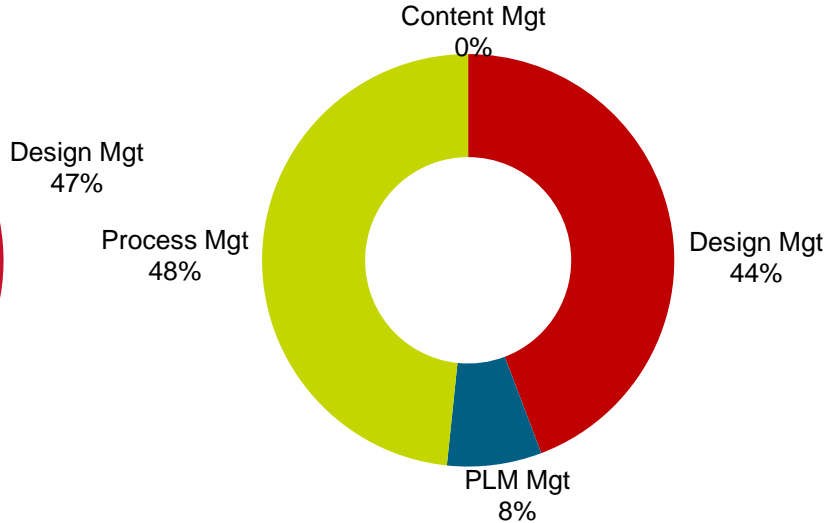
IT solutions for the public websites and intranet solutions as well systems for e-commerce.

NET SALES AND EBITA BY BUSINESS AREA, Q1 2013

Net sales by Business Area



EBITA by Business Area*



*Excluding central costs

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DESIGN MANAGEMENT



	Q1 2013	Q1 2012	2012
Net sales	176,8	155,5	573,0
Growth	14%		11%
EBITA	16,1	16,6	57,0
EBITA-margin	9,1%	10,7%	9,9%
Average number of employees	236	215	

- Growth was due to strong demand from the offshore industry in Norway, and in the construction/property and manufacturing industries in Sweden. The Finnish market was stable and Denmark, which is the smallest unit in the business area, had a tougher market.
- During the quarter, an exclusive contract was signed with ÅF pertaining to software and services related to the Autodesk platform.

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PRODUCT LIFECYCLE MANAGEMENT



	Q1 2013	Q1 2012		2012
Net sales	57,0	63,3		249,1
Growth	-10%			-2%
EBITA	2,7	4,4		29,5
EBITA-margin	4,7%	7,0%		11,8%
Average number of employees	149	138		

- At the beginning of 2013, the business area noted a more cautious attitude from customers to new major projects, which impacted both net sales and earnings.
- Lower net sales were offset by cost efficiency and adequate execution of ongoing projects. A competency center has been established in India

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PROCESS MANAGEMENT



	Q1 2013	Q1 2012	2012
Net sales	100,4	96,4	380,5
Growth	3%		5%
EBITA	17,6	17,2	68,6
EBITA-margin	17,5%	17,8%	18,0%
Average number of employees	259	238	

- Demand for the products and services offered by the business area to the Swedish public sector remained favorable. The acquisition of Abou had a positive impact on both sales and earnings.
- The case management and e-archive offering to the public sector had favorable growth, with the capture of several highly competitive public procurements.

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CONTENT MANAGEMENT



	Q1 2013	Q1 2012	2012
Net sales	40,7	46,2	175,6
Growth	-12%		-
EBITA	-1,0	5,2	11,5
EBITA-margin	-2,5%	11,3%	6,5%
Average number of employees	173	175	

- IVR solutions had a good trend.
- The net sales and the result has been affected by a lower demand for the consulting offering and that a customer has decided to insource a major application management operation.

STRONG BALANCE SHEET AND CASH FLOW

SEK **155** M

NET CASH
2013-03-31

SEK **45.6** M

CASH FLOW FROM OPERATING
ACTIVITIES
Jan – March 2013

SEK **100** M

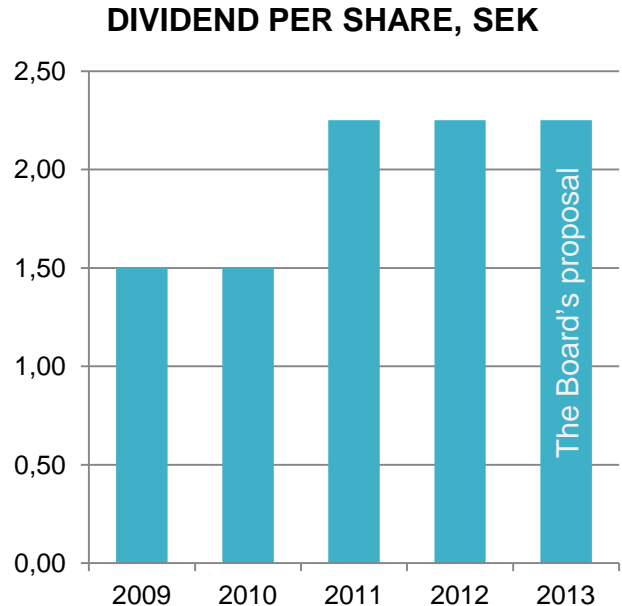
CREDIT LINE

60 %

EQUITY
2013-03-31

THE BOARD'S DIVIDENT PROPOSAL

- "At least 50 percent of the Group's profit after tax will be distributed to shareholders, provided that the net cash position is sufficient to operate and develop the business."
- The Board proposes an unchanged dividend of 2,25 (2,25) SEK per share.



Summary

- A market situation we have learned to manage.
- Customers' want to invest but it takes longer time to sell.
- Leading positions in several markets.
- Underlying customer needs and growth.
- Customers in both private and public sector.
- Business model with recurring revenue.
- Strong balance sheet and healthy cash flow.



QUESTIONS?

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ABOU

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ARKIVA

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CAD-Q

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CARTESIA

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IDA INFRONT

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INFUSEIT

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