



**26 October
2016**



**President & CEO
Staffan Hanstorp**

ADDNODE GROUP

Q3 2016

Agenda

- Summary of Q3 2016
- Significant events
- The business
- Financial development



Summary of Q3 2016: CEO succession from AGM 2017. Staffan Hanstorp proposed as new Chairman of the Board.

Net sales, SEK m

467.1 (467.3)

EBITA, SEK m

39.6 (42.2)

EBITA margin

8.5 (9.0) per cent

Earnings per share after dilution

0.57 (0.71) SEK

Cash flow from operating activities

SEK -37.2 m (-18.0)



Significant events during the third quarter



Acquisition of Swedish software providers' EssVision and Stamford.

Establishment of new software company focusing of e-health and pharmacy solutions.

Agreement with the City of Gothenburg can be signed when appeal is not granted for review. Order value approximately SEK 35 m.

Agreement with larger authority within the safety and security sector, order value of approximately SEK 5 m.

Significant events after the end of the period



Agreement with Stadler, order of approximately 2,000 user licenses.

New credit facility of SEK 200 m.

Johan Andersson succeeds Staffan Hanstorp as President and CEO by AGM 2017. Hanstorp proposed as new Chairman of the Board.



CEO succession from AGM 2017



Staffan Hanstorp – proposed as new Chairman of the Board

- 23 years of experience from the company
 - Major shareholder in Addnode Group through Aretro Capital Group
 - Will remain actively engaged in the company strategy and acquisitions
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Johan Andersson – new CEO from 4 May 2017

- CFO since 2013
- In the Group Management Team since 2007, responsibilities include business development, acquisitions, communication and investor relations

Three new companies in our brand portfolio

PHARMASOLUTIONS

ADDNODE GROUP

- Establishment of software company focusing on business critical software solutions for the e-health and pharmacy sector on the Norwegian market.
 - Partnership with EY Norway and Canella.
 - Business area: Process Management
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ESSVISION

ADDNODE GROUP

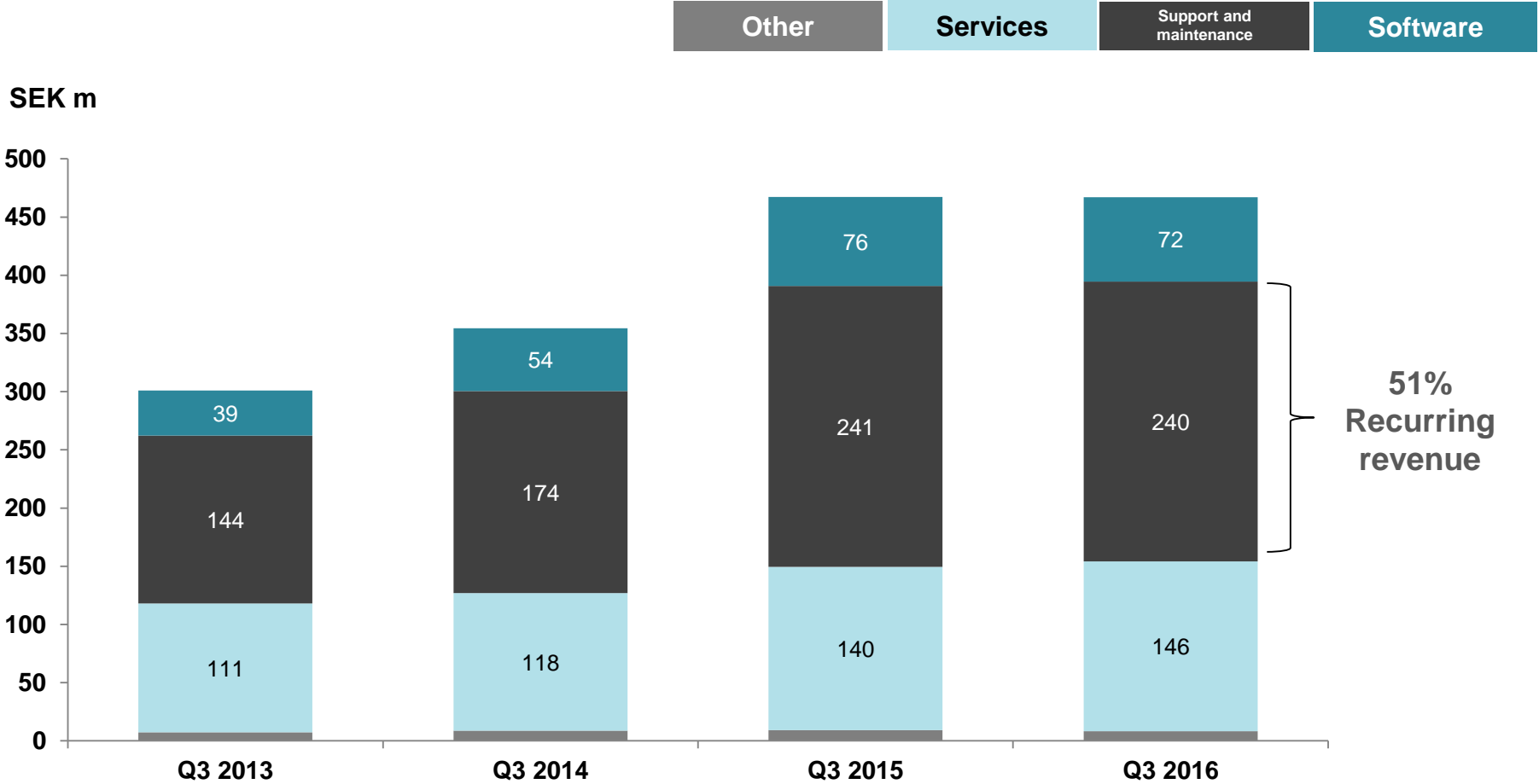
- Swedish software provider within document and case management.
 - 2015 net sales: SEK 13 m, an operating margin of 17%.
 - Business area: Process Management
-

STAMFORD

ADDNODE GROUP

- Swedish software provider of business critical IT solutions.
- 2015 net sales: SEK 31 m, an operating margin of 19%.
- Business area: Process Management

More than half of our revenue are recurring



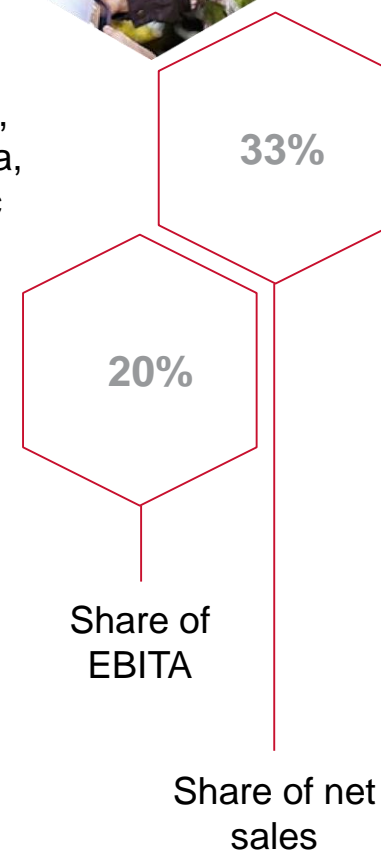
Design Management

IT solutions for design and construction.

- Change of Symetri business model. From license sales to rental model.
- Strong development of Swedish property- and facility management sector and proprietary Interaxo software.
- Decreased amount of customer requests in Norway and GB following lower oil price.

Selected customers:

Akademiska Hus, Atos IT Services, Deepocean, Frontica Business Solutions, Hille Melbye Arkitekter, Marintek, Martela, Riksdagsförvaltningen and Trans Adriatic Pipeline.



	Q3 2016	Q3 2015	Variance
Net sales, SEK M	156,0	161,7	-3,5%
EBITA, SEK M	9,1	13,1	-31%
EBITA margin	5,8%	8,1%	-28%
Average employees	320	316	-4

Product Lifecycle Management (PLM)

IT solutions for product data information.

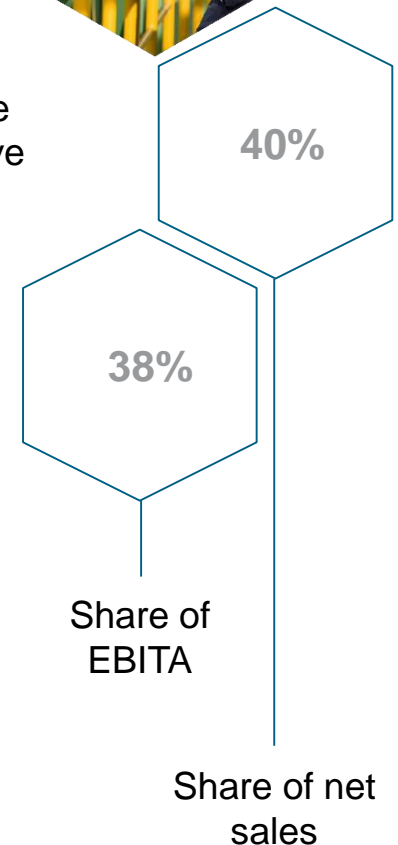


- Good sales of proprietary software and services strengthens EBITA margin.
- After the end of the period, agreement signed with Stadler, comprehending 2,000 user licenses.

Selected customers:

AKVA Group, Honeywell Turbo Technologies, GFi, Dräxlmaier, Mölnlycke Health Care, Husqvarna, PSW automotive engineering, Geberit and Stadler Rail.

	Q3 2016	Q3 2015	Variance
Net sales, SEK M	186,1	186,6	-0.3%
EBITA, SEK M	17,3	15,9	+9%
EBITA margin	9,3%	8,5%	+9%
Average employees	443	385	+58



Process Management

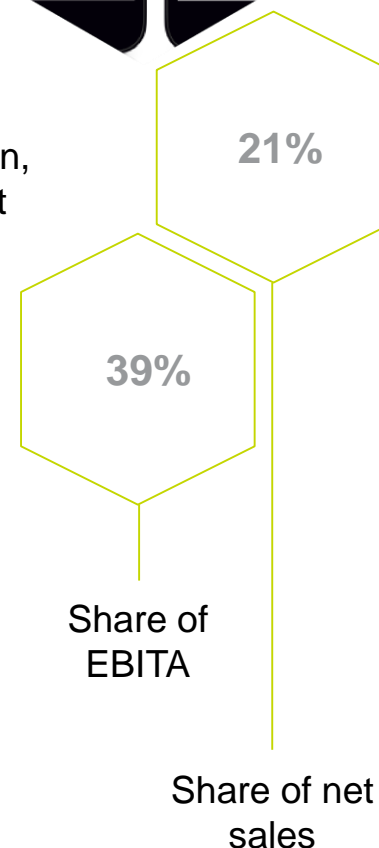
IT solutions for document- and case management.



- Acquisitions of two software companies and establishment of one new.
- Agreement with Gothenburg City, order value of SEK 35 m, will be signed when appeal is not granted for review.

Selected customers:

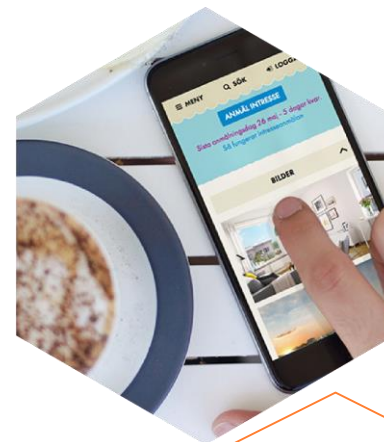
Göteborgs Stad, National Folkehelseinstitut, Malmö Stad, Naturvårdsverket, NFC, Norrtälje kommun, Polismyndigheten, Riksantikvarieämbetet and Stockholms Stad.



	Q3 2016	Q3 2015	Variance
Net sales, SEK M	100,4	92,5	+8.5%
EBITA, SEK M	18,0	18,2	+1%
EBITA margin	17,9%	19,7%	-9%
Average employees	277	271	+7

Content Management

IT solutions for web and e-commerce, telecom and customer services.

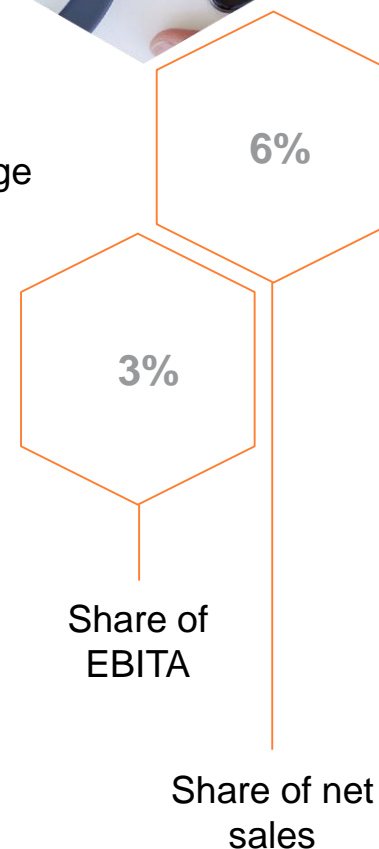


- Net sales and earnings in par with last year.

Selected customers:

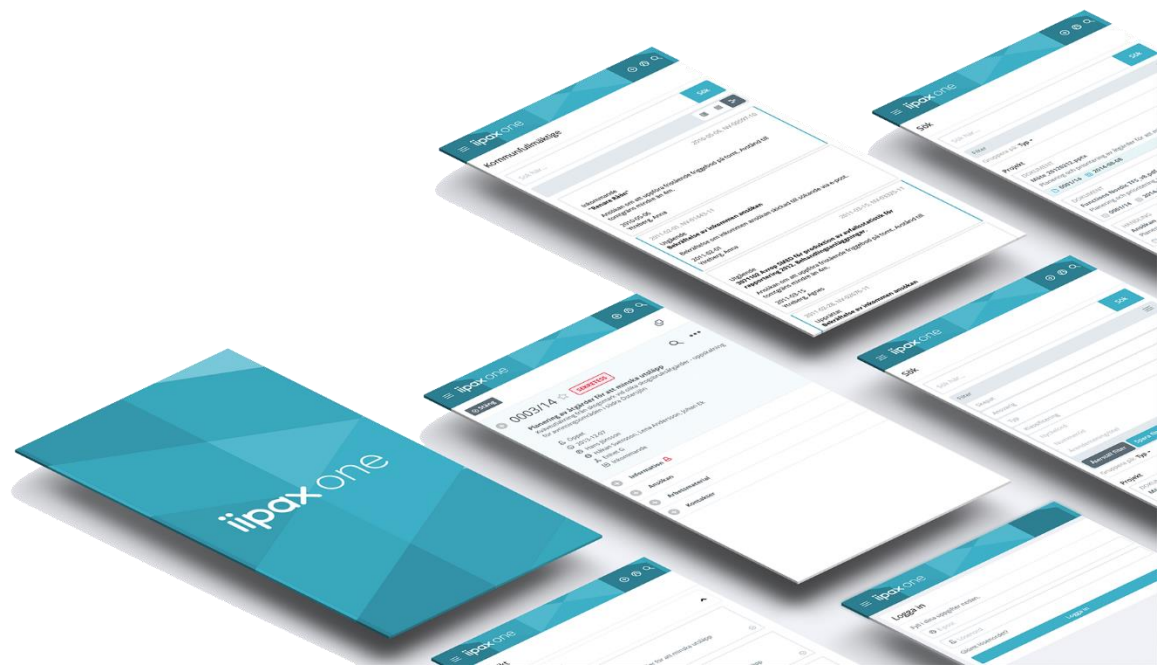
Blocket, DNB, Konsumenternas Förskringsbyrå, Sodexo, Statens Energimyndighet, Swedegas, TDC Sverige and ZeroChaos.

	Q3 2016	Q3 2015	Variance
Net sales, SEK M	29,5	29,4	+0.3%
EBITA, SEK M	1,2	1,5	-20%
EBITA margin	4,1%	5,1%	-20%
Average employees	116	130	-14



CFO

Johan Andersson



New credit facility of SEK 200 m for further acquisitions

Used

Unused

Credit facility of SEK 200 m signed in January 2015

SEK 156 m

SEK 44 m

New credit facility of SEK 200 m signed in October 2016

SEK 200 m

Revolving credit facility of SEK 100 m → not used per 2016-09-30

SEK 100 m

Good financial position and a strong cash flow

SEK 61.6 m
Cash
30 September 2016

SEK 84.8 m
Cash flow from operating activities
1 January – 30 September 2016

SEK 115.7 m
Net debt
30 September 2016

51%
Equity/Assets Ratio
30 September 2016

Our largest shareholders as per September 30, 2016

Shareholders	Capital, %	Votes, %
Vidinova AB ¹⁾	24,4	26,8
Aretro Capital Group AB ²⁾	12,4	23,6
Swedbank Robur Fonder	9,6	7,3
Lannebo Fonder	9,0	6,8
Handelsbanken Fonder AB	5,2	4,0
Didner & Gerge Fonder	3,3	2,5
Fjärde AP-fonden	2,7	2,0
Grenspecialisten Förvaltning AB	2,5	1,9
E Öhman Jr Fonder	2,3	1,8
Försäkringsbolaget Avanza Pension	2,2	1,7
Other shareholders	26,4	21,6
Total	100,0	100,0

1) Board member Dick Hasselström is the principal owner of Vidinova AB.

2) Aretro Capital Group AB is jointly owned by Staffan Hanstorp, Addnode Group's President and CEO, and Jonas Gejer, the Business Area Manager of Product Lifecycle Management.

Contact



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5D SYSTEM

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