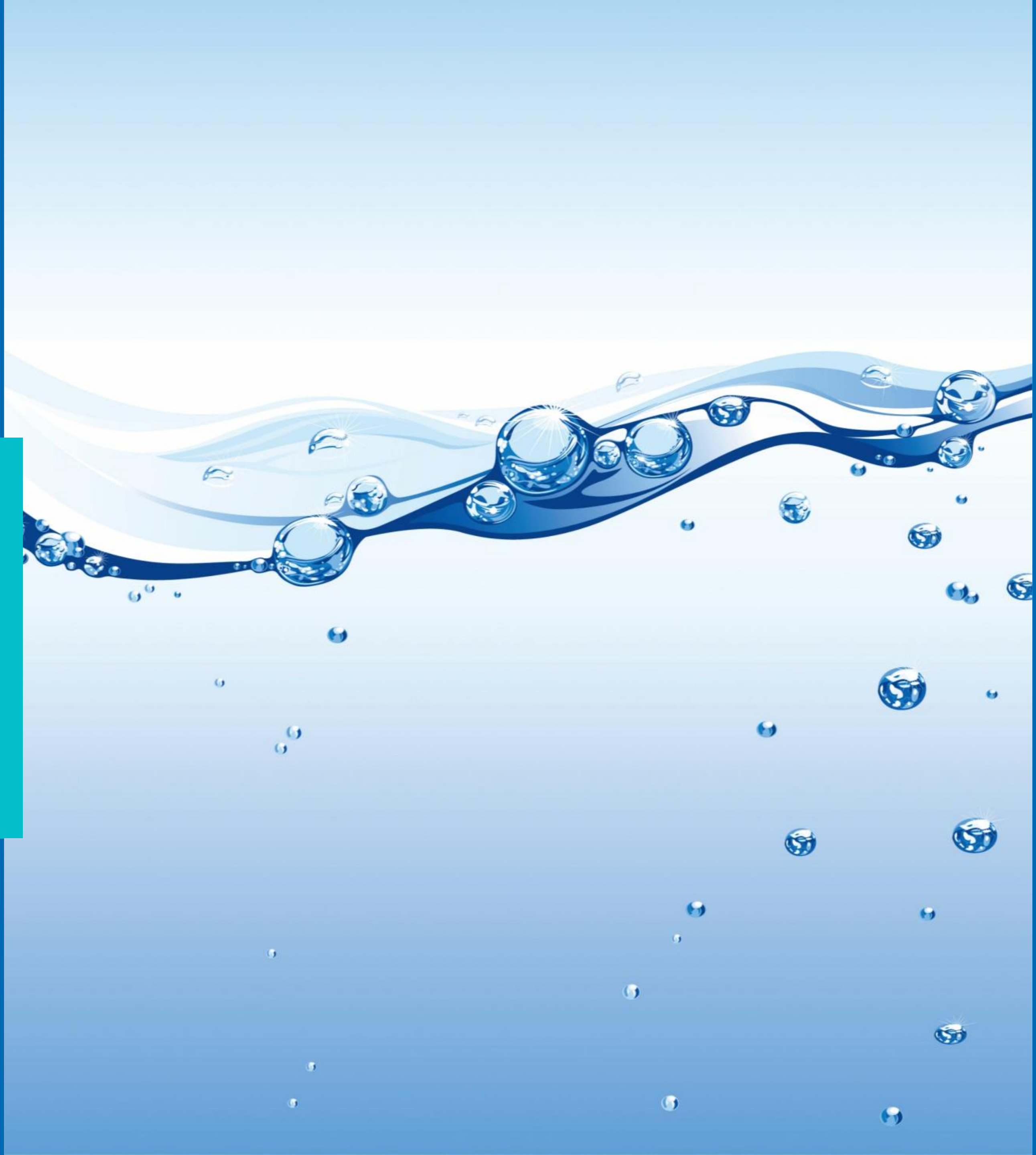
WATERCO
water, the liquid of life

HY26 Results Presentation

ASX:WAT
www.waterco.com.au

23 February 2026



Disclaimer

Important notices

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Summary information

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Financial data

All dollar values are in Australian dollars ($) unless stated otherwise.

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Watrerco's results are reported under International Financial Reporting Standards (IFRS). This Presentation also includes certain non-IFRS measures including "underlying", "adjusted“ and "pro-forma" and other measures that are used internally by management to assess the operational performance of the businesses in the Group. Non-IFRS measures have not been subject to audit or review. All numbers listed as "statutory" comply with IFRS and have been reviewed or audited.

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Past performance is no guarantee of future performance.

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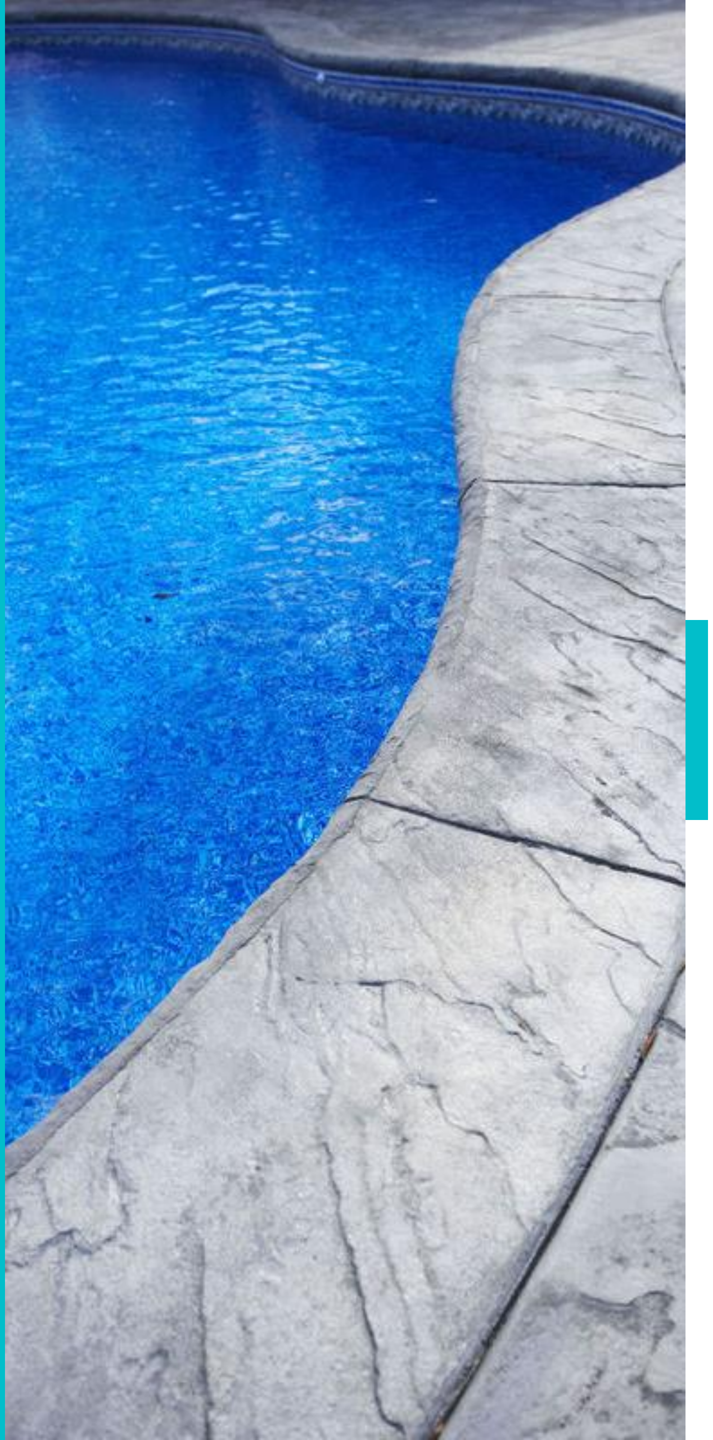
HY26 Results Highlights



01

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Financial Highlights

$130.3m (-2%)
Sales Revenue

$18.3m (+10%)
Underlying[1] EBITDA

$12.3m (+14%)
Underlying[1] EBIT

$7.4m (+12%)
Underlying[1] NPAT

7cps
Interim Dividend

$102.9m
Inventory

1. Refer to the Appendix for further information on Non-IFRS financial measures.

Half Year Results ending 31 December 2025 (HY26)

Results Summary[1]

Financial Period Ended ($ million)	HY26	HY25	% Change
Operating revenue	133.2	134.7	-1%
Sales revenue	130.3	132.4	-2%
Underlying EBITDA	18.3	16.6	10%
Underlying EBIT	12.3	10.7	14%
Underlying EBIT / Sales Revenue	9.4%	8.1%	16%
Underlying NPBT	10.2	8.7	17%
Underlying NPAT	**7.4**	**6.6**	12%
Statutory NPAT	**6.7**	**5.9**	13%
Underlying EPS (cents)	21.1	18.8	12%
Dividends per share (cents)	7	7	0%

Underlying Divisional EBIT ($ million)	HY26	HY25	% Change
Australia and New Zealand	8.3	8.2	1%
North America and Europe	2.0	0.7	196%
Asia	2.0	1.9	8%
Consolidated Underlying EBIT	**12.3**	**10.7**	**14%**

Key Highlights

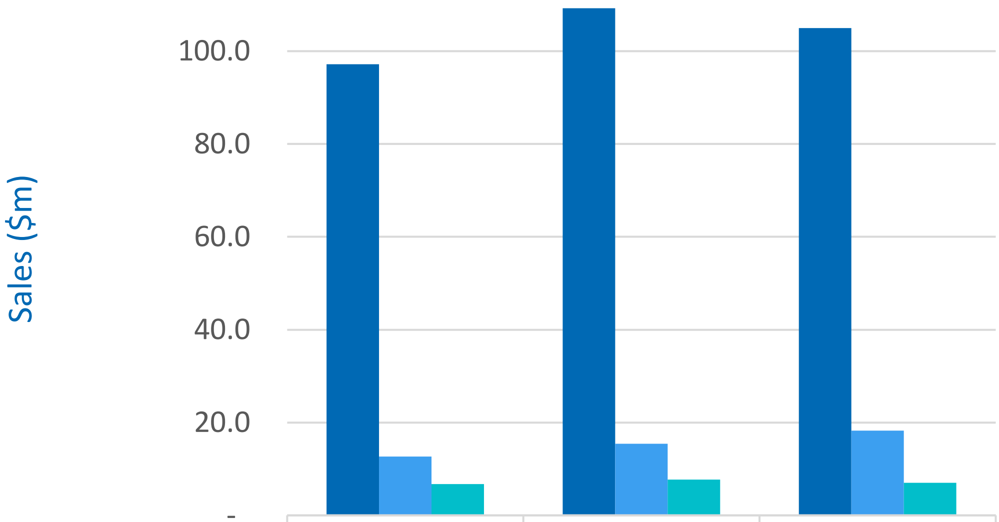
- Underlying earnings increases across each segment/division.
- Sales revenue decreased by 2% to $130.3 million.
- Sales increased across North America and Europe but decreased slightly in ANZ from temporary supply chain changes, and a small decrease in Asia reflecting depressed capital flows into the region.
- Underlying EBITDA of $18.3 million, up 10% from the prior corresponding period (pcp).
- Underlying EBIT increased 14% to $12.3 million.
- Underlying NPAT of $7.4 million, a 12% increase from pcp.
- Statutory NPAT increased 13% to $6.7 million.
- Underlying EPS of 21.1 cents.
- An interim dividend of 7 cents per share declared.

1. Refer to the Appendix for further information on Non-IFRS financial measures.

Group Sales Performance

Group Sales in each Region

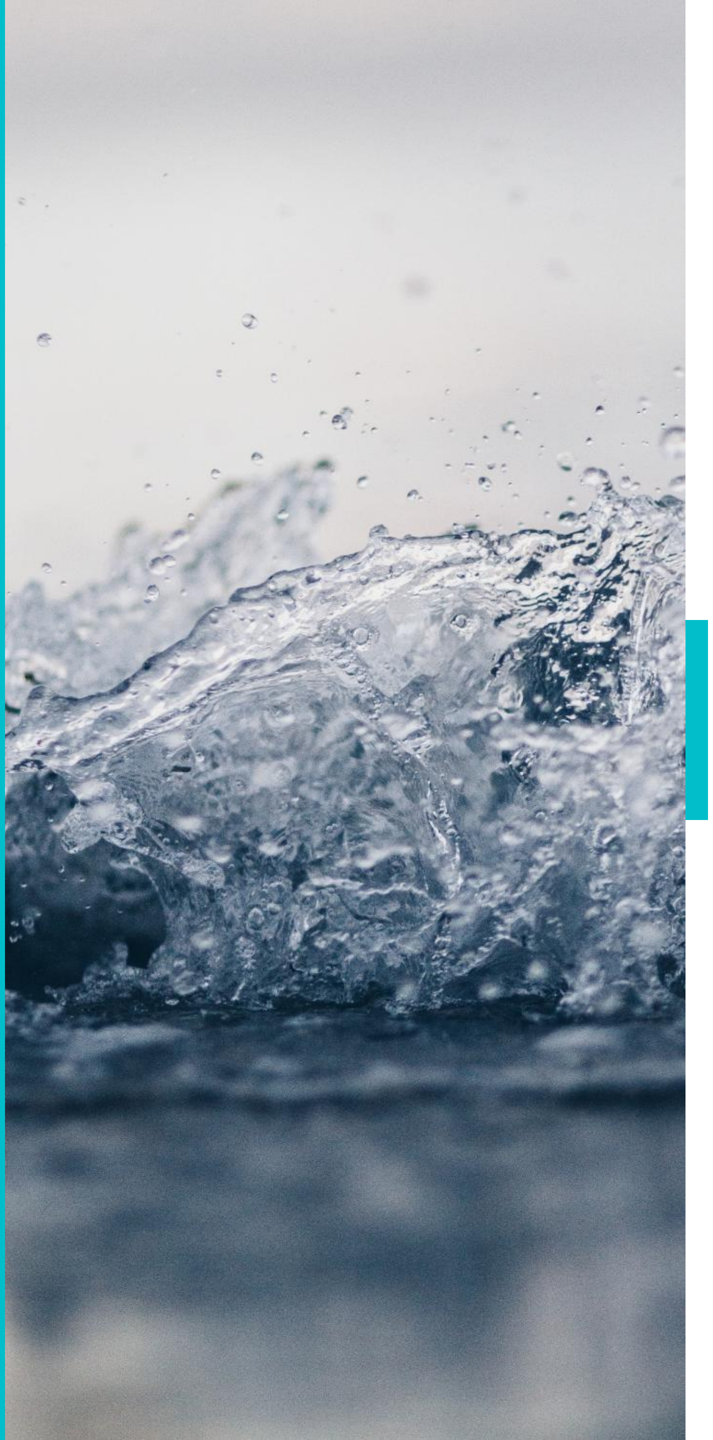
Sales Growth by Segment (Region)



	HY24	HY25	HY26
ANZ	97.2	109.2	105.0
Nth America & EU	12.7	15.4	18.3
Asia	6.7	7.7	7.0

- **Group Performance** – Despite softer sales overall, disciplined cost control and Malaysian manufacturing efficiencies drove improved EBIT and margins, underscoring the benefits of supply chain optimisation.
- **Regional Sales Performance** – Sales growth in North America and Europe offset softer conditions in ANZ and Asia.
- **ANZ** – Sales of $105.0m (-4%) reflected supply chain realignment and temporary stock constraints from Malaysian insourcing; with the transition largely complete, the region is positioned to stabilise and return to growth.
- **North America and Europe** – Sales increased 18% to $18.3m, driven by stronger European demand and new distribution channels, partially offset by a modest decline in North America.
- **Asia** – External sales of $7.0m (-9%) reflected softer capital flows; continued investment in Malaysian manufacturing capacity supporting medium-term growth.

HY26 Operational Highlights



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Operational Highlights

Strategic Insourcing

Expanded Malaysian manufacturing insourcing improved margins, strengthened operational control and reduced reliance on external suppliers across key product lines.

North America Platform

Commercial customised product pipeline expanding, supported by planned manufacturing capacity upgrades to improve lead times and service capability.

Supply Chain Optimisation

Broadened supply chain migration into Malaysia enhances efficiency, supports ANZ stabilisation and creates a scalable platform for future growth.

Davey Integration Progress

Davey NZ amalgamated into Waterco NZ, with NZ IT and warehouse integration on track for completion in second half FY26.

European Distribution

New distribution channels established in Europe, strengthening market access and helping offset competitive and macroeconomic headwinds.

Capacity & Capability

Ongoing capacity expansion and strengthened leadership depth across finance, operations and commercial functions support global growth execution.

Davey Integration Journey

DAVEY

1HY24

Acquisition Completed – Davey acquired September 2023, creating a larger group with complementary pumps, filtration, and treatment strengths.

2HY24

Early Financial Gains – As separate business, first 10 months delivered 85% sales growth and 60% EBIT uplift to Group, strengthening balance sheet capacity.

1HY25

Integration Underway – Restructuring commenced with aligned teams, unlocking faster product development, broader coverage, and stronger innovation.

2HY25

Synergy Realisation – Began cost savings via shared warehousing, freight optimisation, manufacturing specialisation, and streamlined shared services.

1HY26

Scale Advantage Established – Combined revenues and distribution deliver operational efficiencies, logistics benefits.

FY26 & Beyond

Market Expansion & Growth – Cross-selling and expanded global reach position fully integrated Group for further growth.

Executing for Growth

From Reset to Delivery

Executing Strategic Priorities

Following FY25's reset and restructuring phase, HY26 demonstrates early benefits of the rebased platform translating into improved profitability and operational momentum.

Manufacturing Transformation

- Continued strategic insourcing in Malaysia driving margin uplift and operational control
- Manufacturing throughput consolidation supporting second half margin progression

Integration & Systems

- Davey NZ amalgamation completed
- Global IT platform rollout commencing H2

Global Commercial Expansion

- New European distribution channels opened
- Commercial product growth opportunities in North America

Strengthened Platform for Scalable Growth

- Leaner cost base and streamlined corporate functions now embedded
- Treasury restructure reducing FX volatility risk
- Leadership depth and financial discipline translating into improved execution

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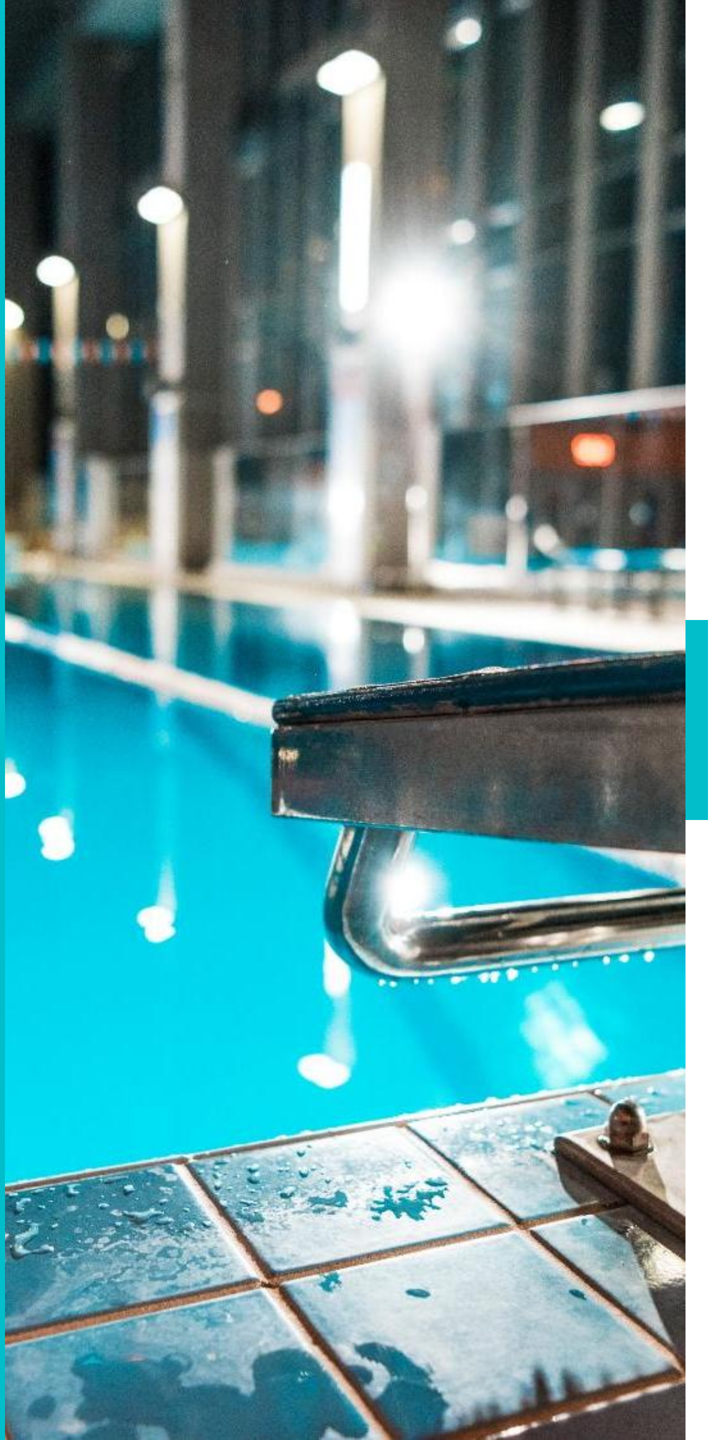
HY26 Financial Summary



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Statement of Profit or Loss

Profit or Loss	HY26 $000	HY25 $000
Sales revenue	130,279	132,391
Other revenue	2,939	2,354
Changes in inventories	(4,564)	(6,932)
Raw materials and consumables used	(61,724)	(62,217)
Employee benefits expense	(28,224)	(28,898)
Depreciation, impairment and amortisation	(6,027)	(5,875)
Finance costs	(2,139)	(2,059)
Advertising expense	(2,566)	(3,101)
Outward freight expense	(3,437)	(3,750)
Rent expense	(1,038)	(863)
Research and development	(1,269)	(1,633)
Insurance – general	(1,097)	(1,101)
Warranty expense	(1,031)	(1,263)
Commission expense	(220)	(269)
Foreign exchange (losses)/gains	(845)	(992)
Other expenses	(9,840)	(8,059)
Profit before income tax expense	9,197	7,733
Income tax benefit/(expense)	(2,474)	(1,805)
Profit for the period	**6,723**	**5,928**
EPS (cents)	*19.2*	*16.7*
DPS (cents)	*7*	*7*

Highlights

- Total Revenue decreased 1% to $133.2m, with Sales Revenue down 2% on pcp to $130.3m.
- Profit uplift was driven by stronger Group margins, supported by Malaysian manufacturing insourcing, lower production costs and integration efficiencies from Davey operations.
- NPBT of $9.2m, up 19% from pcp.
- NPAT of $6.7m, an increase of 13% on pcp.
- EPS of 19.2 cents.
- Interim dividend declared of 7 cents.

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Statement of Financial Position

Balance Sheet	HY26 $000	FY25 $000
Cash and cash equivalents	21,532	24,522
Trade and other receivables	40,636	33,466
Inventories	102,850	92,661
Other current assets	4,175	6,607
Total Current Assets	169,193	157,256
Property, plant & equipment	78,013	71,583
Right of use assets	28,812	31,475
Intangible assets	1,120	1,173
Deferred tax assets	3,025	2,756
Total Non-Current Assets	110,970	106,987
Total Assets	280,163	264,243
Trade and other payables	36,042	25,965
Borrowings	46,191	7,200
Lease liabilities	8,269	8,474
Other current liabilities	10,071	9,493
Total Current Liabilities	100,574	51,132
Borrowings	7,922	42,025
Lease liabilities	22,336	24,653
Other non-current liabilities	3,570	3,790
Total Non-Current Liabilities	33,827	70,468
Total Liabilities	134,400	121,600
Net Assets	**145,763**	**142,643**
Total Equity	**145,763**	**142,643**

Highlights

- Cash position of $21.5m.
- Net working capital of $107.4m.
- Increase in bank loans largely as a result of completion of Malaysian land acquisition.
- Refinancing of existing Westpac debt facilities is currently underway with formal credit approval received on 17 February 2026. This is expected to allow $39.5m of borrowings classified as current at 31 December 2025 to be reclassified as non-current by FY26 year end.
- NTA increased to $4.11 per share.

Statement of Cash Flows

Cash Flows	HY26 $000	HY25 $000
Cash Flows from Operating Activities		
Receipts from customers	134,301	135,755
Payments to suppliers and employees	(124,032)	(131,838)
Interest received	36	39
Other Income	591	390
Finance costs	(1,479)	(2,059)
Income tax paid	(2,871)	(950)
Net cash provided by operating activities	6,546	1,337
Cash Flows from Investing Activities		
Payment for property, plant & equipment	(8,722)	(2,497)
Proceeds from sale of property, plant & equipment	39	158
Proceeds from sale of business	(70)	1
Net cash (used in)/provided by investing activities	(8,753)	(2,338)
Cash Flows from Financing Activities		
Proceeds from bank borrowings	5,192	5,447
Repayment of bank borrowings	(400)	(3,519)
Dividends paid	(2,812)	(2,813)
Other	(2,784)	(2,259)
Net cash (used in) financing activities	(804)	(3,144)
Net (decrease) / increase in cash held	(3,011)	(4,145)
Cash at beginning of the year	24,522	16,802
Exchange rate adjustments	21	3,395
Cash and cash equivalents the end of the year	**21,532**	**16,052**

Highlights

- Operating Cash Flow of $6.5m ($1.3m in HY24).
- Completion of the Malaysian land acquisition and additional machinery for manufacturing insourcing contributed to capital expenditure of $8.7m during the period.
- Total dividend payment steady on pcp.
- Closing cash balance of $21.5m.

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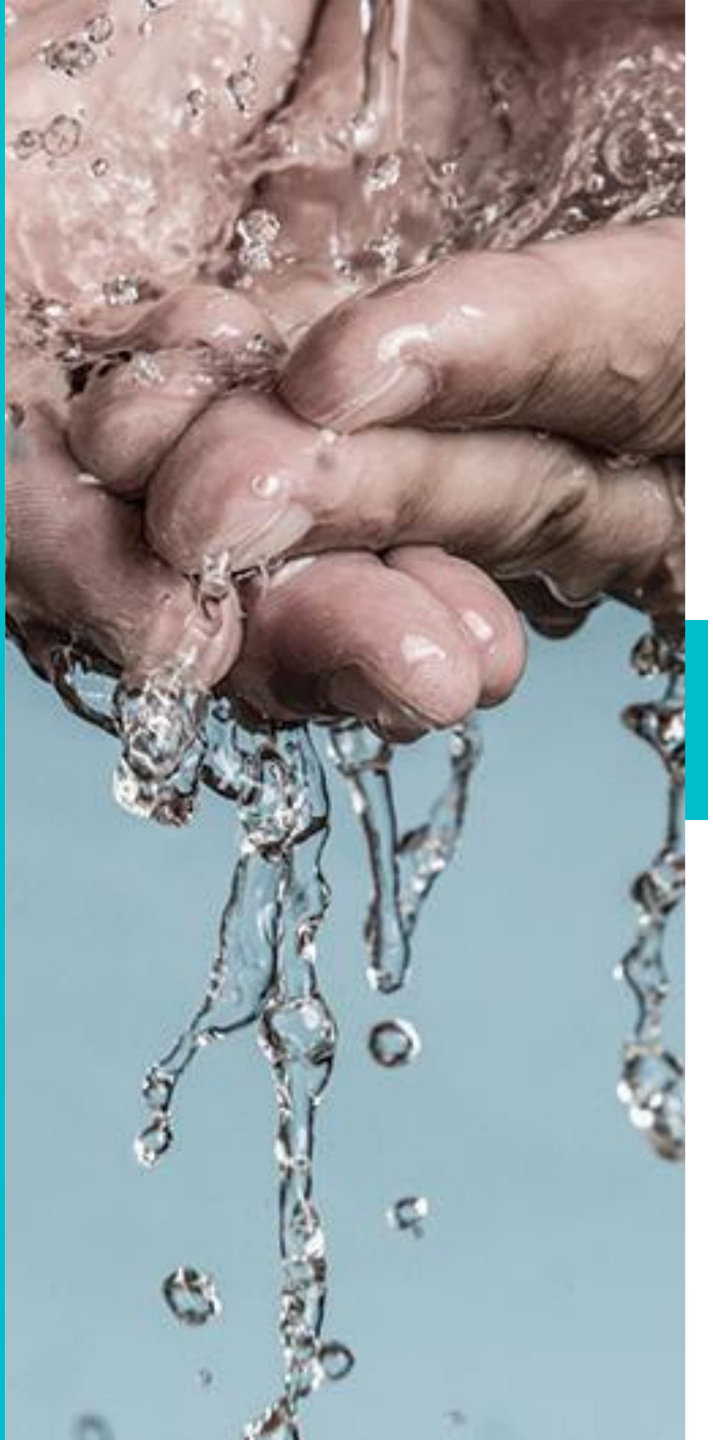
Company overview



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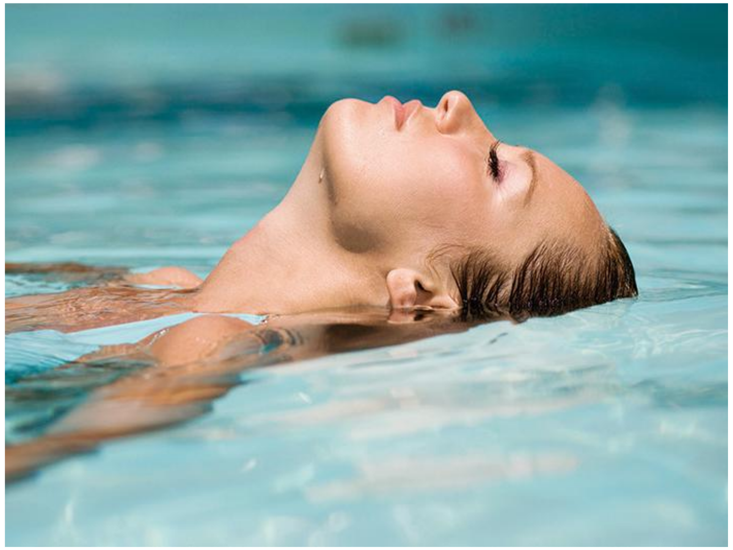
Our Business

Waterco is a vertically integrated water technology group that designs and manufactures innovative filtration and sanitisation solutions for swimming pools, spas, aquaculture, and water treatment and transfer markets.

POOL & SPA

- Wide range of products, including chemicals for swimming pools and spas.
- Owner of the Swimart franchise, which features pool stores and mobiles in ANZ.



TRANSFER (PUMPS)

- Pumping solutions to transfer water with ease and dependability.
- Owner of Davey Water, a trusted brand and leader in the pump industry.

TREATMENT (FILTRATION)

- Waterco offers filtration and sanitisation solutions for all types of applications.
- Waterco's Micron fibreglass filters are considered some of the largest in the commercial market today.

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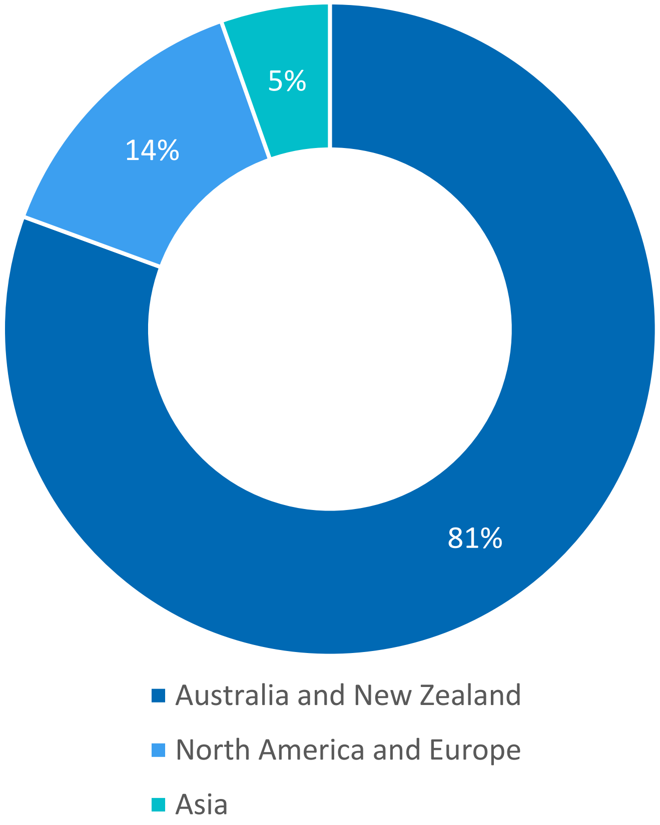
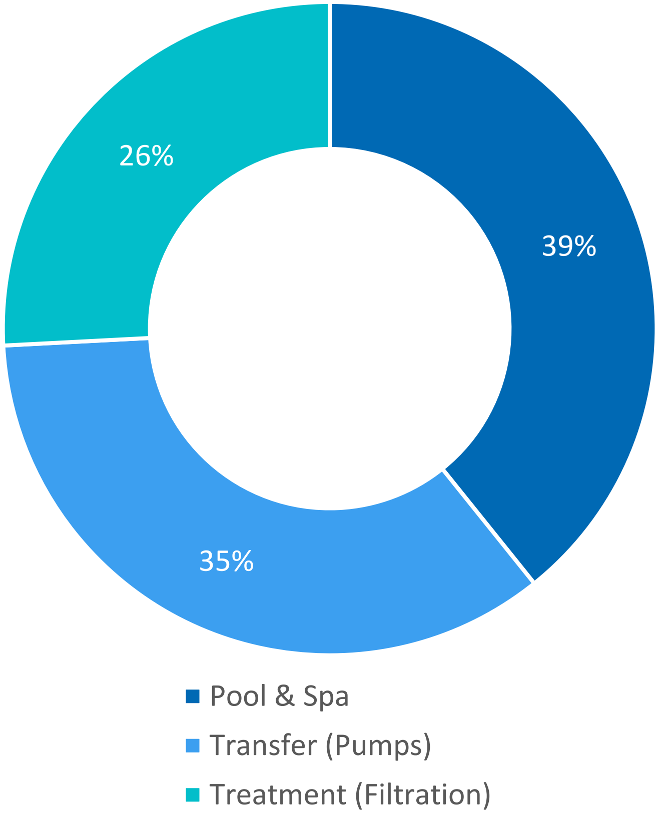
Waterco At A Glance

Recognised for quality manufacturing, technical expertise, and continuous product innovation across pumps, filtration, and water treatment solutions.

SALES BY REGION (SEGMENT)



SALES BY PRODUCT VERTICAL



Revenue Growth

- **ANZ Leadership** – The majority of Group revenue is generated in ANZ, supported by a broad and diversified product portfolio. The Group's strategy is to build a leading vertically integrated position in the fragmented pool market.
- **Davey Integration** – Davey enables strengthened market share by expanding the product range and opening new distribution channels across residential, rural, and commercial markets.
- **International Growth** – Waterco intends to increase scale in North America, Europe & Middle-East with targeted partnerships and expanded distribution networks.
- **Asian Platform** – The Group's established manufacturing base in Malaysia underpins cost efficiency and provides a springboard for broader growth.

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Our Brand Strength

Waterco

- Waterco's innovative filtration and sanitisation solutions, driven by engineering strength and robust manufacturing, have solidified our leadership in the water treatment industry, especially for commercial applications demanding unwavering reliability and performance.
- ASX Listed with a strong domestic and global presence.

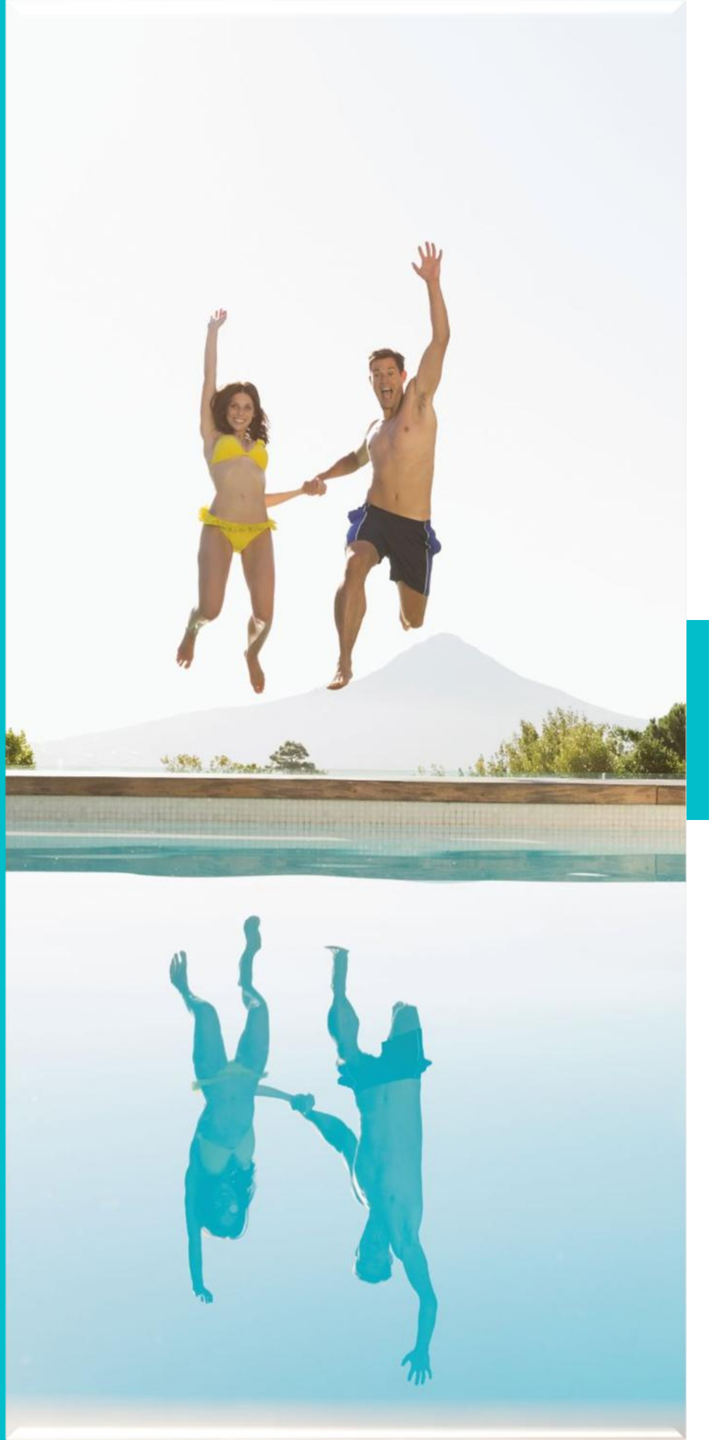
Davey

- Davey is the leading manufacturer of residential and commercial pumps in Australia.
- Trusted brand, born in Australia 90 years ago.
- Dependable products and strong relationships with Australian dealers (multi-generational).

Swimart

- Established in 1983, Swimart is focused on making pool care easy, with 66 retail stores and 6 mobile franchises across Australia and New Zealand.
- With over 40 years of industry expertise, Swimart is a trusted brand in the Australian and New Zealand pool and spa industry.

Growth Strategy



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Growth Strategy – by Vertical and Region

POOL & SPA

- Swimart to increase franchise footprint with further independent conversions and potential acquisitions.
- Davey Pools to increase penetration of independent sales channels in highly fragmented market.
- Increase connected technology products.

TRANSFER (PUMPS)

- Leverage trusted brands and innovate next generation energy efficient products.
- Develop new partnerships across Group's distribution channels to capture market share.
- Address water efficiency demand in rural ANZ and Asia with premium products.

TREATMENT (FILTRATION)

- Differentiate Waterco's superior commercial filters to capture greater market share across various sectors.
- Drive repeat business from 'stickiness' of engineered/bespoke product suite.
- Meet rising demand for premium water safety products.

ANZ

- Refine and implement a Go-To-Market Sales & Service Model using advanced systems and expanded networks to increase market share in key territories.
- Enhance data intelligence in industrial, commercial, and consumer connected services to increase transaction values.

NTH AMERICA & EMEA

- Dominate commercial filtration by leveraging Waterco's position as one of the few market participants, in areas like aquatic centres.
- Expand market share in home pressure systems, firefighting equipment, and pool products through new channels.

ASIA

- Capitalise on positive demographic trends and surging demand for pool products and clean water solutions in the home.
- Establish regional branches close to manufacturing hubs, enabling efficient delivery of innovative solutions.

Long-Term Growth

Waterco is strategically positioned to generate significant and sustained long-term growth.

Tailwinds and Trends

- Energy efficiency regulations
- Health and wellness awareness
- Environmentally sustainable products
- Technology innovations and IoT adoption
- Favourable demographic and investment trends
- Water safety
- Water scarcity

Industry Drivers

- Connected products, product monitoring and maintenance / predictive capabilities
- Recycling water (domestic and industrial)
- Water conservation systems
- Annuity like demand
- Consistent sector growth
- Growing demand for premium products

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Our Competitive Advantages

Largest Australian-owned manufacturer of water transfer and water treatment products – combination of the best filters and the best pumps, with the best technology.

Manufacturing Expertise

- Leading R&D / product development capability with speed to market.
- Expertise accelerates innovation and fosters the development of premium differentiated products.
- Manufacturing plants in Australia and Asia.

Market Leadership

- The combined entity will leverage Waterco's and Davey's established presence to create a broader international footprint and stronger market leadership.
- Waterco's established presence in the Australian metropolitan pool and spa markets complements Davey's comprehensive coverage of regional Australia.

Product Mix

- By merging Waterco's and Davey's product range, the combined company can offer a one-stop shop for comprehensive water management, creating a significant competitive advantage.
- Cross-Selling & Up-Selling Opportunities: The partnership allows for leveraging each other's customer base.

Vertical Integration

- Waterco vertically integrates its operations by controlling both the manufacturing and distribution of its products.
- As well as the franchisor of the Swimart retail network for distribution in Australia and New Zealand.

Proprietary Technology

- With the combined might of Waterco's pool equipment innovations and Davey's proprietary water treatment technologies, the merger creates a powerhouse of intellectual property in the water management industry.

Outlook

06

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Key trends shaping the industry present exciting opportunities

Water scarcity

- Demand for fresh water increasing, supply at risk
- Water re-use, conservation, ESG

Energy efficiency

- Increased energy efficiency regulations (EU / USA / ANZ)
- Climate consciousness

Smaller, better quality

- Smaller pools in smaller yards with premium products

Connected products

- Demand for smart, connected products
- App integration
- Product monitoring, predictive maintenance

Home & health

- Increased health consciousness

…we are seizing these opportunities to scale and grow with our customers

H2 Outlook and beyond

Global Platform & Integration

- Rollout of a unified global IT platform commencing in H2, targeted for completion in FY27
- Expected to enhance operational visibility, strengthen Davey integration and drive long-term efficiency and profitability

H2 Operational Priorities

- Expand market reach and diversify product offerings
- Optimise warehouse and storage footprint across Australia to improve efficiency
- Progress international distribution partnerships beyond ANZ
- Continue investment in systems, internal capability and Malaysian manufacturing expansion

Manufacturing & Margin Focus

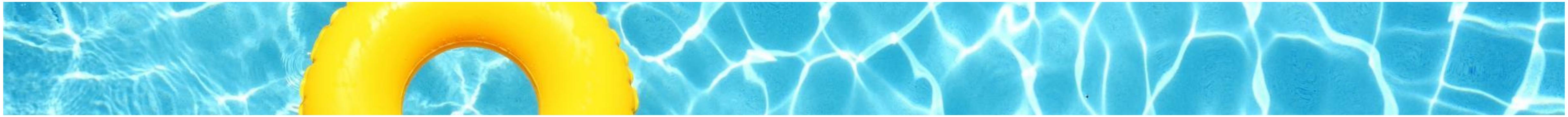
- Further consolidate manufacturing throughput in Malaysia
- Target continued margin improvement across H2 sales

Treasury & Risk Management

- Treasury restructure implemented to mitigate foreign exchange translation volatility experienced in FY25

Earnings Objective

- Targeting statutory EBIT growth in FY26 above FY25 result of $16.7 million
- Maintaining a cautious stance on the global economic environment through H2



Appendix

07

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Key Metrics and Definitions

Reconciliation to HY26 reported earnings

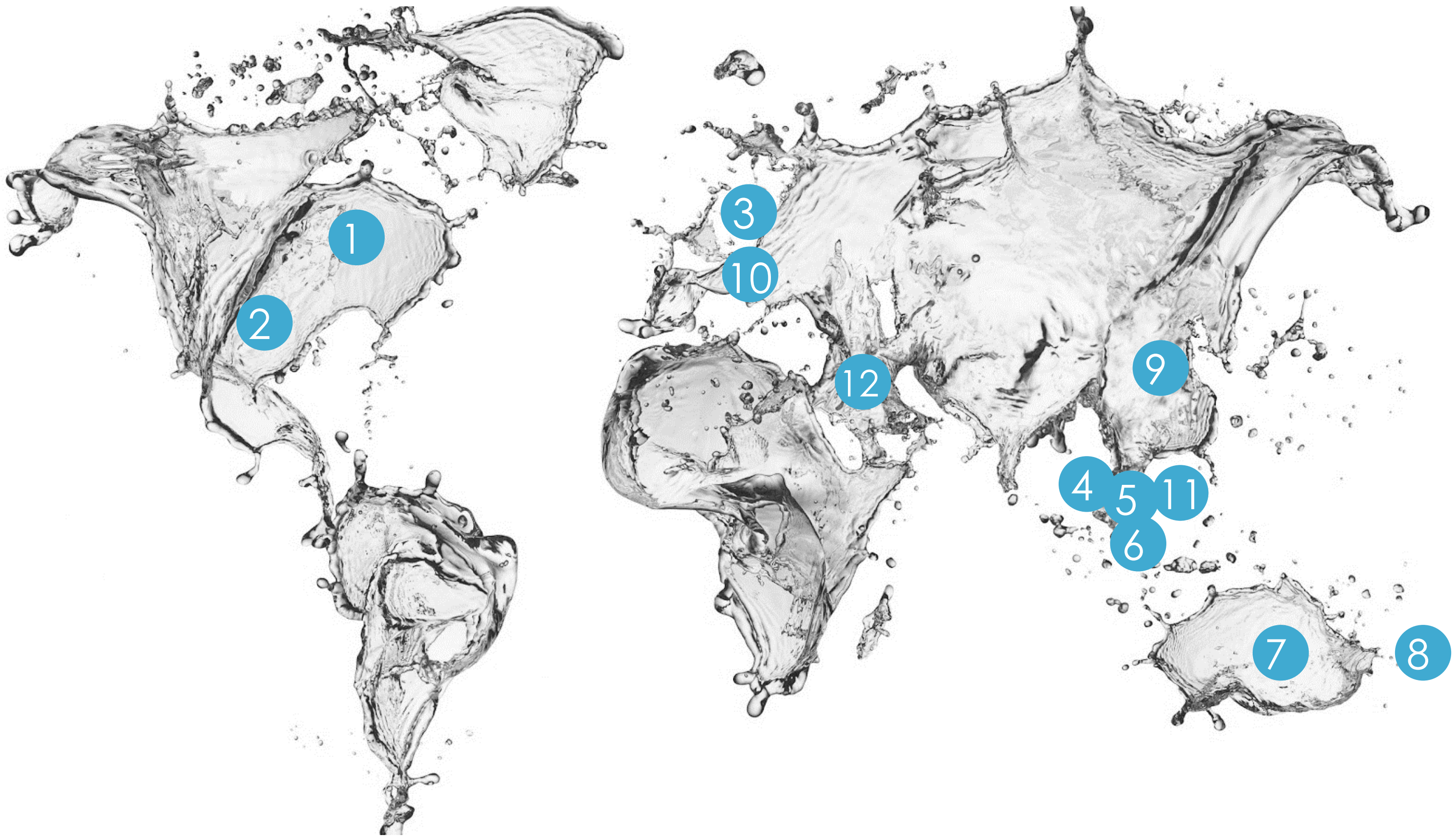
	Metric ($ million)	HY26	HY25	% Change
Reported	EBIT	11.3	9.8	16%
	NPBT	9.2	7.7	19%
	NPAT	**6.7**	**5.9**	13%
	EPS (cents)	19.2	16.7	15%
Adjusted	Depreciation, impairment & amortisation	(6.0)	(5.9)	
	EBITDA ($ million)	17.3	15.6	11%
Add/(deduct) non-recurring items	Foreign exchange losses/(gains)	-	1.0	
	Restructuring costs	1.0	-	
	Tax benefit	(0.3)	(0.3)	
Underlying	Underlying EBITDA	18.3	16.6	10%
	Underlying EBIT	12.3	10.7	14%
	Underlying NPBT	10.2	8.7	17%
	Underlying NPAT	**7.4**	**6.6**	12%
	Underlying EPS (cents)	21.1	18.8	12%

Group definitions

EBITDA	Reported EBIT adding back depreciation, impairment and amortisation expense.
Foreign exchange losses/(gains)	FX translation losses on intra-group loan and trading balances. As a result of restructuring of the Group's treasury operations which was implemented in calendar year 2025, going forward, volatility in foreign exchange translation fluctuations on intra-group transactions should be substantially reduced.
Net debt	Total borrowings (calculated on a pre-AASB16 Leases basis) less cash and cash equivalents.
Net working capital	Inventory plus debtors less creditors.
Restructuring costs	Costs associated with the corporate restructuring including business integration and transformation one-off costs.
Return on capital employed	Underlying EBIT as a percentage of shareholders equity plus net debt.

Underlying items reflects statutory profit as adjusted to reflect the Directors' assessment of the result for the ongoing business activities of the Group, in accordance with AICD principles of recording underlying earnings. Underlying profit measures have not been audited. Certain prior-period comparatives may be adjusted to ensure consistency across periods for underlying adjustments.

Global Presence



Waterco exports its products to over 40 countries via its branches in Australia, New Zealand, China, Malaysia, Singapore, Indonesia, Vietnam, United Kingdom, France, Canada and America.

Planned expansion of Malaysian manufacturing base to service future growth anticipated for Northern America and Europe.

1. CANADA
Longueuil, Sales and Distribution.

2. USA
Augusta, Warehousing,
Sales and Distribution.

3. UK
Kent, Warehousing,
Sales and Distribution.

4. MALAYSIA
Kuala Lumpur Research and Development,
Manufacturing, Warehousing, Sales and Distribution.

5. SINGAPORE
Sales and Distribution.

6. INDONESIA
Jakarta Warehousing, Sales and Distribution.

7. AUSTRALIA
Sydney (Head Office), Brisbane, Melbourne, Adelaide, Perth Research and Development, Warehousing, Sales and Distribution.

8. NEW ZEALAND
Auckland Warehousing, Sales and Distribution.

9. CHINA
Guangzhou Chemical Packing, Warehousing, Sales and Distribution, Research and Development.

10. France
Lyon, Warehousing,
Sales and Distribution.

11. Vietnam
Sales and Distribution.

12. UAE
Dubai Warehousing, Sales and Distribution.

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Sustainability and ESG

Sustainability and ESG

Waterco continues to grow its Sustainability efforts and commitment to ESG.

In its manufacture and distribution of water solution products, ESG principles are inherently practiced. Key initiatives include:

- Investment in renewable energy technologies to transition from coal-generated electricity to solar power.
- Successful completion of the 2023 APCO sustainable packaging reporting program by Davey.
- Recognition for sustainability excellence, including Davey's 6-star energy rated pump, awarded in the Pool and Spa industry.
- Offering an extensive range of Climate Care Certified pool equipment, empowering pool owners to achieve optimal environmental sustainability (see opposite).

Climate Care Certified Opportunity

The Climate Care Certification Program is an initiative of the Swimming Pool & Spa Association of Australia Ltd (SPASA Australia).

Waterco has established itself as the go-to resource for pool and spa owners seeking sustainable solutions. This reputation enabled the company to effectively promote and sell Certified Pool Pads, Products, and Systems.

Waterco's association with Climate Care Certified provided the company a significant edge over its competitors. This certification positions Waterco as a responsible and socially conscious organisation that prioritises environmental well-being.

CLIMATE CARE CERTIFIED

THE NEW BENCHMARK IN
ENVIRONMENTAL SUSTAINABILITY
FOR SWIMMING POOLS & SPAS

Summary

Leading Company

Largest Australian-owned (ASX listed) manufacturer of water transfer and water treatment products with an extensive ANZ network and a growing global presence.

Competitive Advantages

Manufacturing powerhouse with strong brands, product diversification, vertically integrated operations and a focus on technology and innovation.

Attractive Industry

The Group is well positioned in an industry experiencing strong tailwinds, consistent growth, favourable demographic trends, and positive industry drivers.

Pathway To Scale

Clear organic growth opportunities combined with demonstrable success in acquisition ability and future potential for inorganic expansion.

Strong Financials

The accretive acquisition of Davey enhances profitable business model with improving earnings, supporting the Group’s track record of revenue, share price and dividend growth.

ESG Alignment

In the manufacture and distribution of water solution products, ESG principles are inherently integrated, together with product awards for sustainability excellence.

WATERCO
water, the liquid of life

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