

# Q1 2026 results

30 April 2026

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The financial information presented for the quarter ending 31 March 2026 was reviewed by the Board of Directors on 28 April 2026 under the chairmanship of Pierre Palmieri and has been prepared in accordance with IFRS as adopted in the European Union and applicable at that date.

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# ① Highlights

# Financial performance

Income statement		Q1 2026	Q1 2025
 Margins <sup>(1)</sup>		587 bps	562 bps
 Net UCS result per unit <sup>(2)</sup>		EUR 403	EUR 703
	Gross UCS result per unit <sup>(3)</sup>	EUR 470	EUR 1,229
 Underlying C/I ratio <sup>(4)</sup>		54.0%	58.0%
 Net income group share		EUR 266m	EUR 220m
	EPS <sup>(5)</sup>	EUR 0.31	EUR 0.24
	ROTE	13.9%	11.0%

## Balance sheet

### CET 1 ratio



**13.9%**

as at 31 March 2026



**EUR 1.5bn green  
bond new issues**

over Jan.-Apr.

1. Leasing and Services margins excluding non-recurring items, annualized and expressed as a percentage of average earning assets

2. UCS (Used car sales) result including impacts of depreciation adjustments

3. UCS excluding impacts of depreciation adjustments

4. Excluding net UCS result and non-recurring items

5. Diluted earnings per share, calculated according to IAS 33. Basic EPS for Q1 2026 at EUR 0.32



# Key developments of the quarter



Integration on track  
with **Power 20**  
**UP 26** plan

EUR 110m synergies<sup>(1)</sup>  
vs. EUR 61m in Q1 2025



ESG recognition

First international leasing  
company with validated SBTi  
trajectory

CO2 emissions of the financed fleet at  
99g/km already within the range of  
Ayvens' 2026 commitment

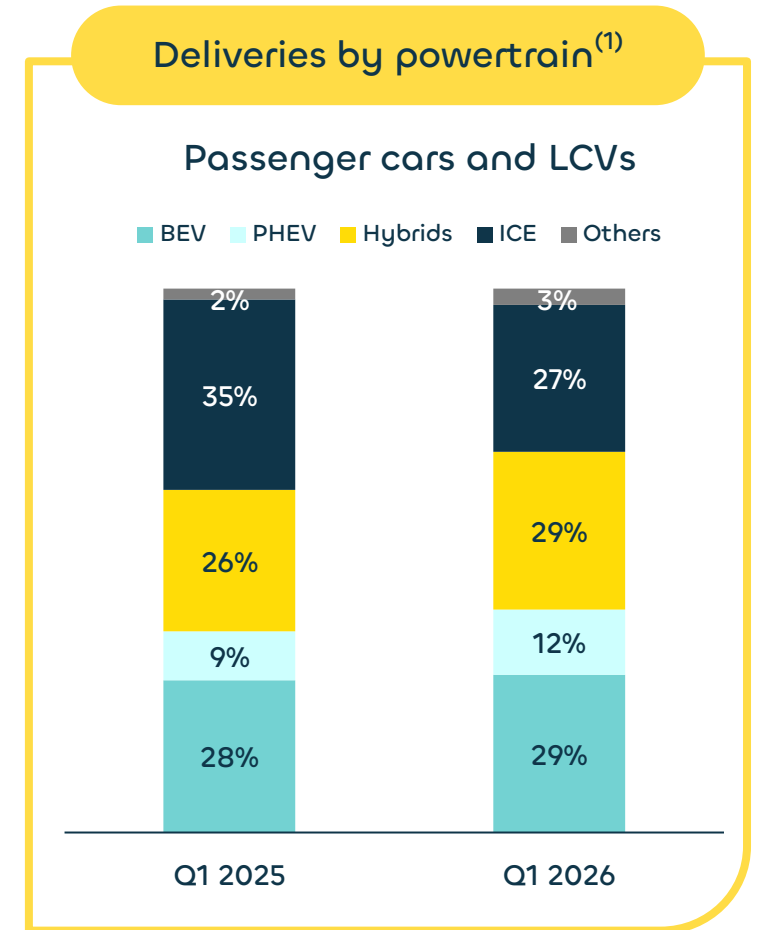
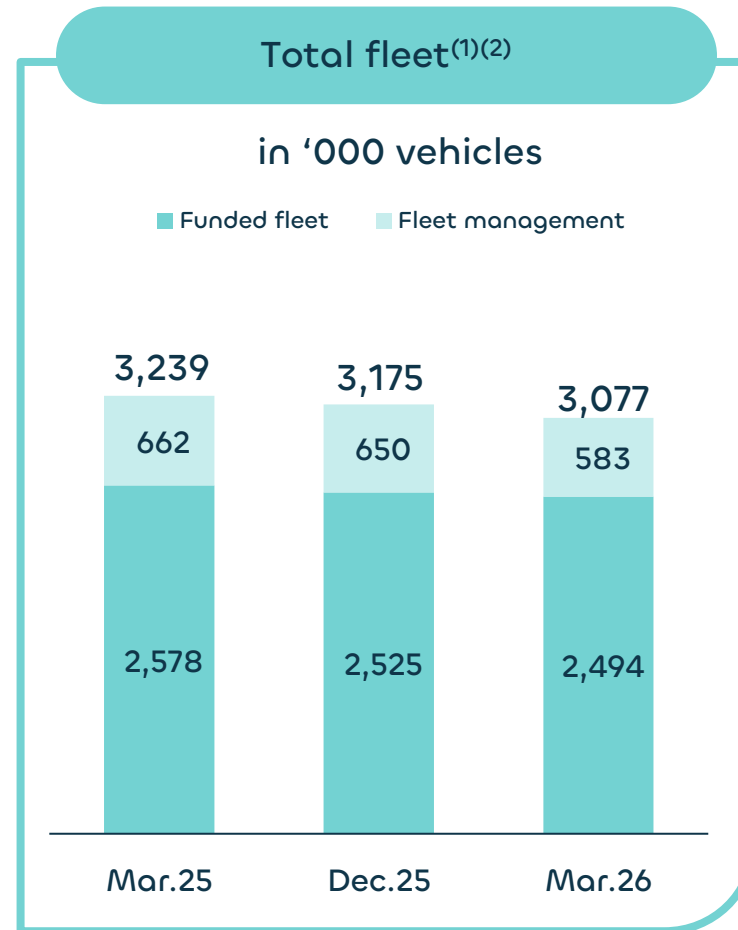
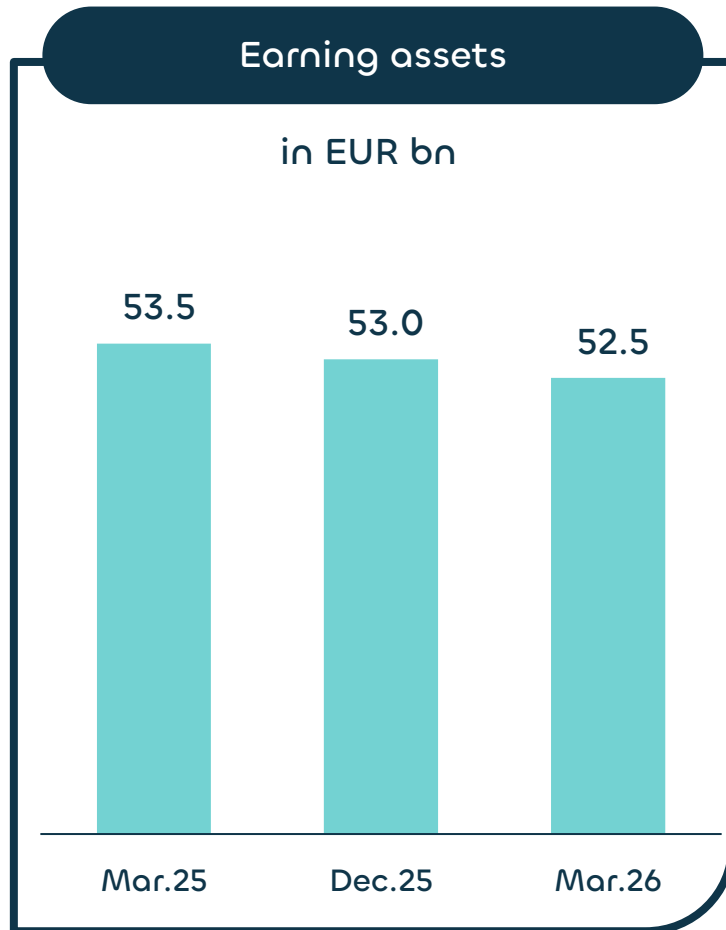


Enhanced market  
profile

Inclusion in MSCI standard  
index since 27 February 2026



# Fleet and earning assets

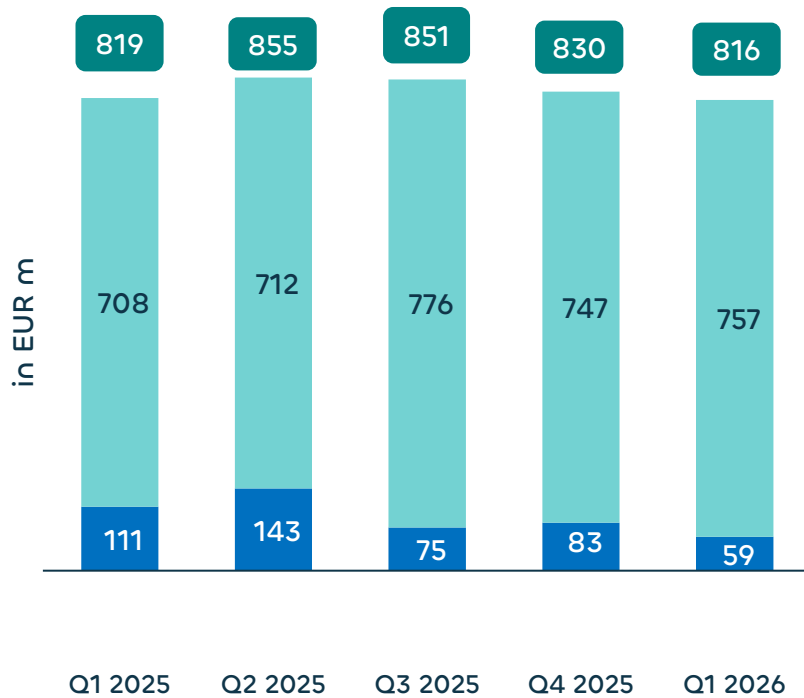


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# Q1 2026 financial results

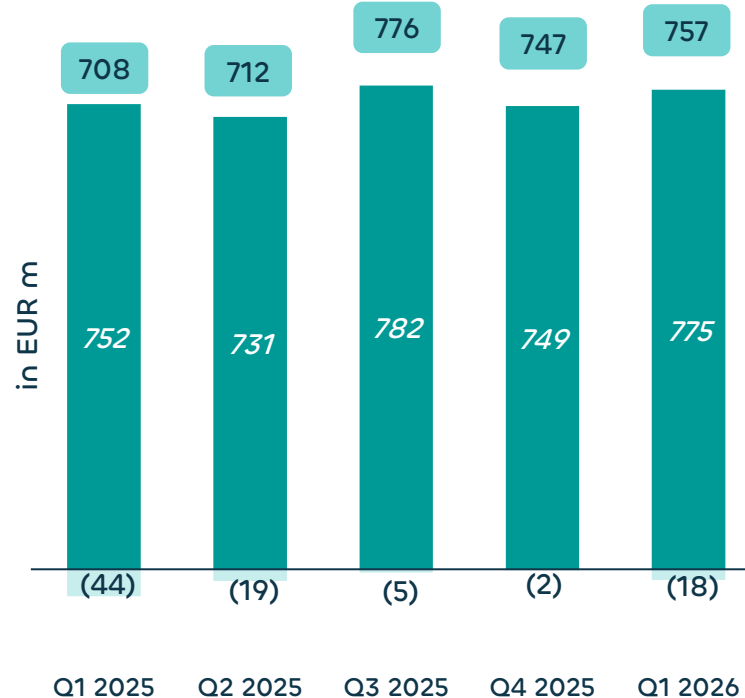
# Stable revenues vs. Q1 2025 with higher margins and UCS normalisation

## Gross Operating Income



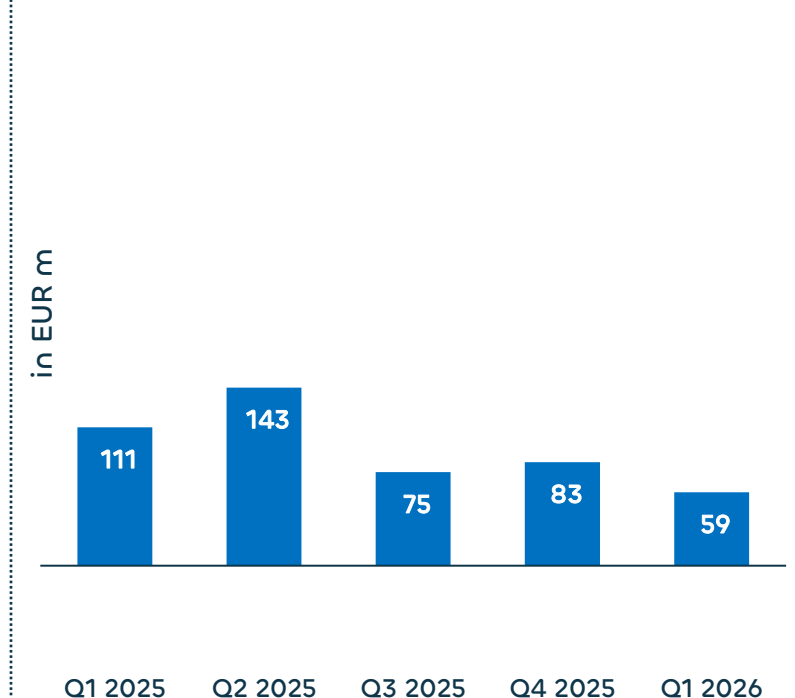
- Gross Operating Income
- Leasing & Services margins
- Net UCS result

## Leasing & Services margins

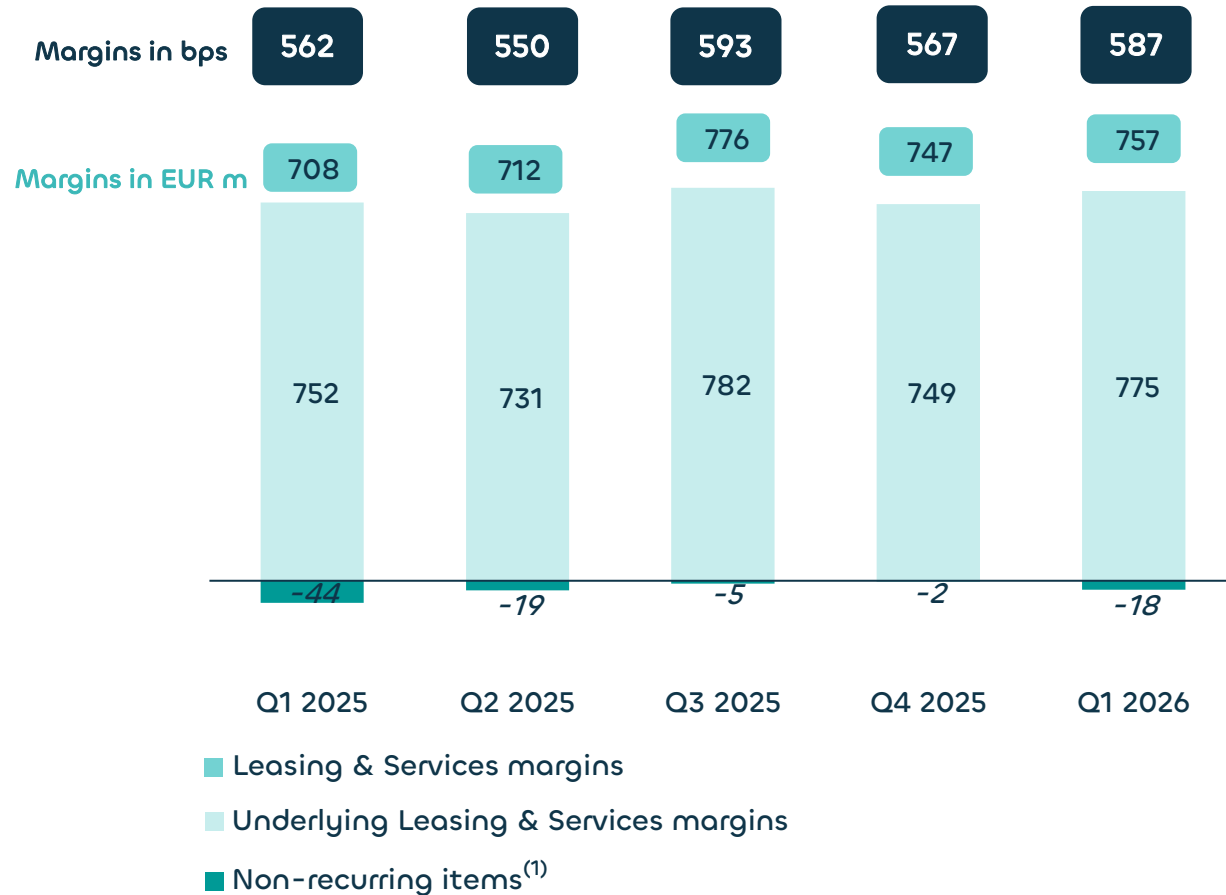


- Leasing & Services margins
- Underlying Leasing & Services margins
- Non-recurring items

## Net UCS result



# Strong margins



- ✓ Underlying margins increase 3.0% vs. Q1 2025, reflecting the continued focus on profitability
- ✓ Non-recurring items: hyperinflation in Turkey

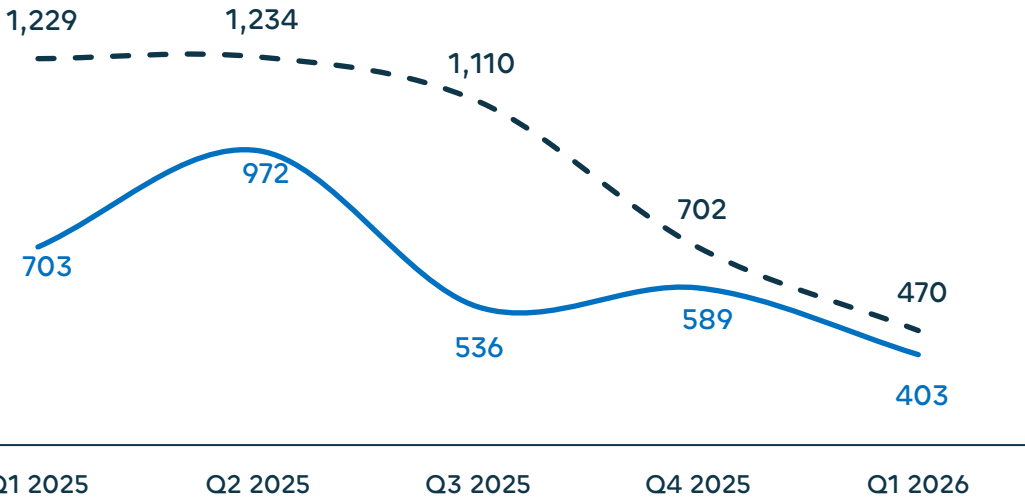
in EUR million	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Non-recurring impacts from treasury activities <sup>(2)</sup>	-7	3	4	-17	6
Hyperinflation in Turkey <sup>(3)</sup>	-34	-20	-7	-27	-19
Impact of PPA	-2	-2	-3	-5	-5
Agreement with the Lincoln consortium	-	-	-	47	-
<b>Total non-recurring items</b>	<b>-44</b>	<b>-19</b>	<b>-5</b>	<b>-2</b>	<b>-18</b>

1. Management information  
 2. EUR -2 million of mark-to-market of derivatives and EUR 8.1 million due to a correction of loan mark-to-market amortisation  
 3. Hyperinflation in Turkey represents a restatement of non-monetary assets and liabilities to reflect changes in the Turkish CPI (Consumer Price Index) adjusted for an impairment of the Turkish earning assets. Impairment is a result of the inflation being above the expected recoverable amount of the vehicles representing a disconnect between CPI and Auto indices in Turkey.

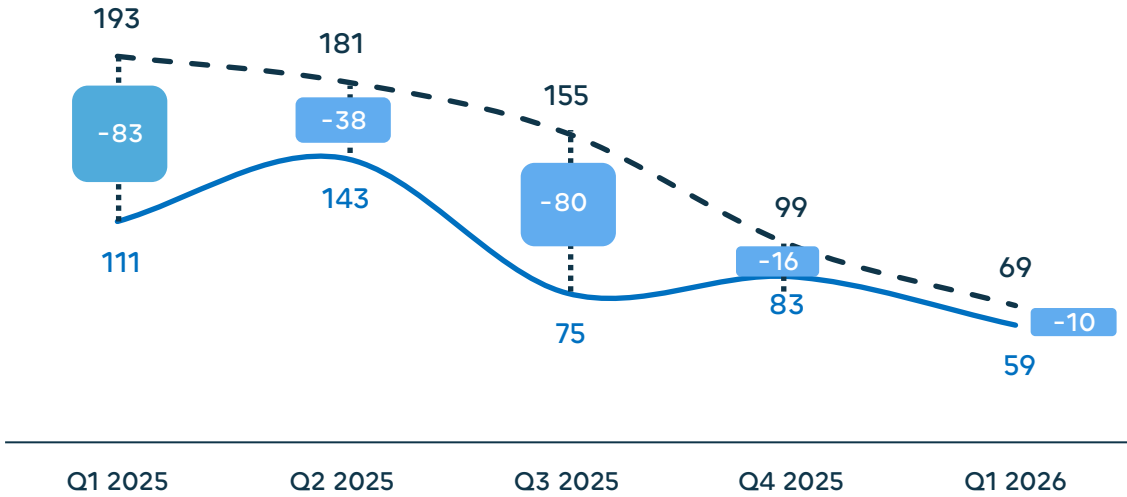


# Ongoing normalization of UCS result

Result per unit sold <sup>(1)</sup>  
in EUR



UCS result  
in EUR m



--- Gross UCS result per unit sold <sup>(2)</sup>  
 — Net UCS result per unit sold <sup>(3)</sup>

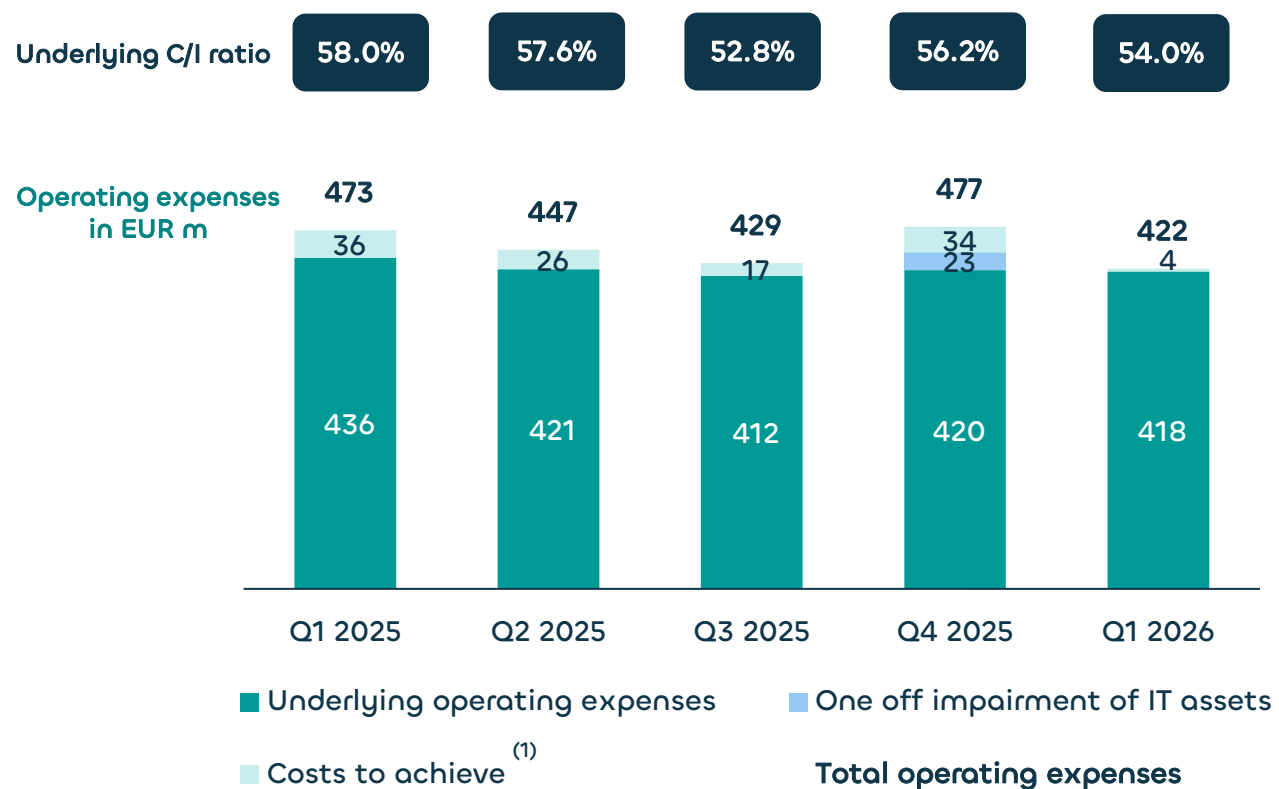
--- Gross UCS result    — Net UCS result    Depreciation adjustments

in '000 units	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Used cars sold <sup>(1)</sup>	157	147	140	141	146

1. Management information  
 2. Gross UCS result – underlying used car sales result, excluding depreciation adjustments  
 3. Net UCS result – used car sales result including depreciation adjustments



# Improving C/I ratio as planned



✓ Costs down -10.7% vs. Q1 2025 and -4.2% on an underlying basis

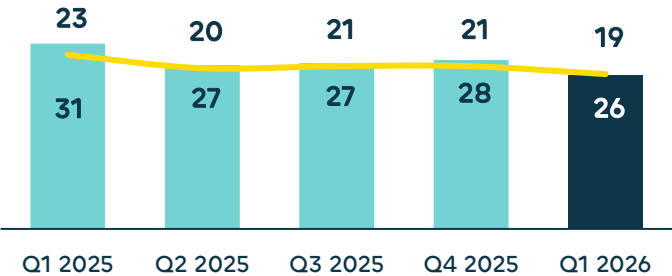
✓ C/I ratio is down 4p.p. vs. Q1 2025

in EUR million	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Costs to achieve <sup>(1)</sup>	36	26	17	34	4
Impairment of IT assets	-	-	-	23	-
<b>Total non-recurring items</b>	<b>36</b>	<b>26</b>	<b>17</b>	<b>57</b>	<b>4</b>



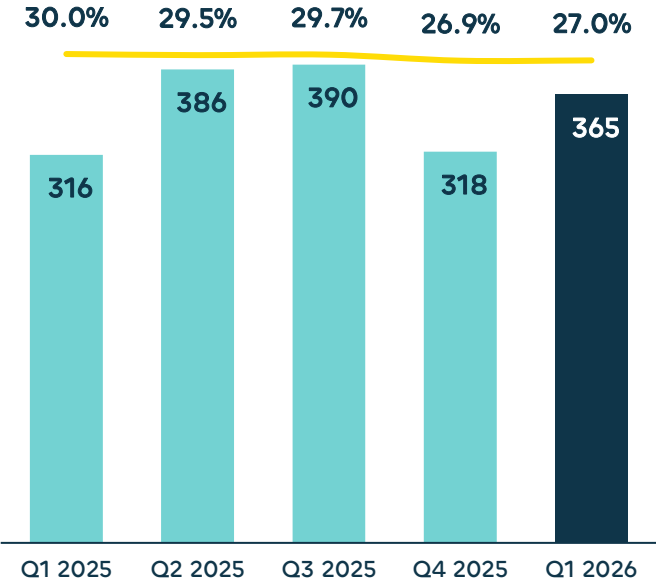
# Q1 2026 net income group share up 21% vs. Q1 2025

Cost of risk  
in EUR m



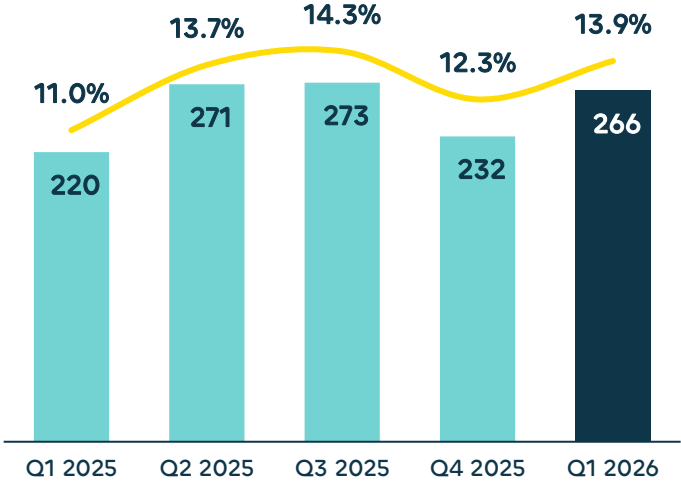
Cost of Risk in bps <sup>(1)</sup>

Profit before tax  
in EUR m



Profit before tax Effective tax rate

Net income group share  
in EUR m

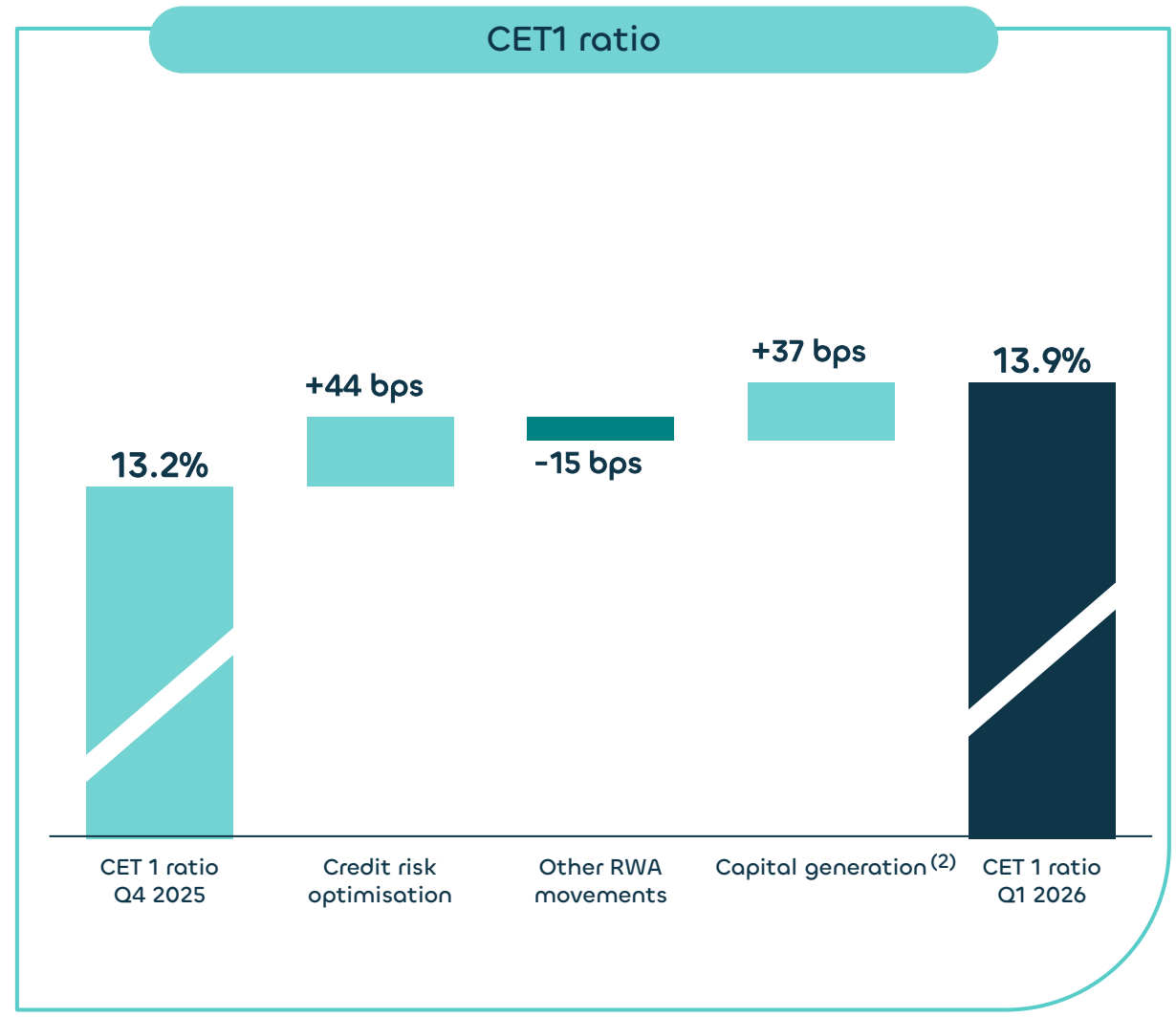
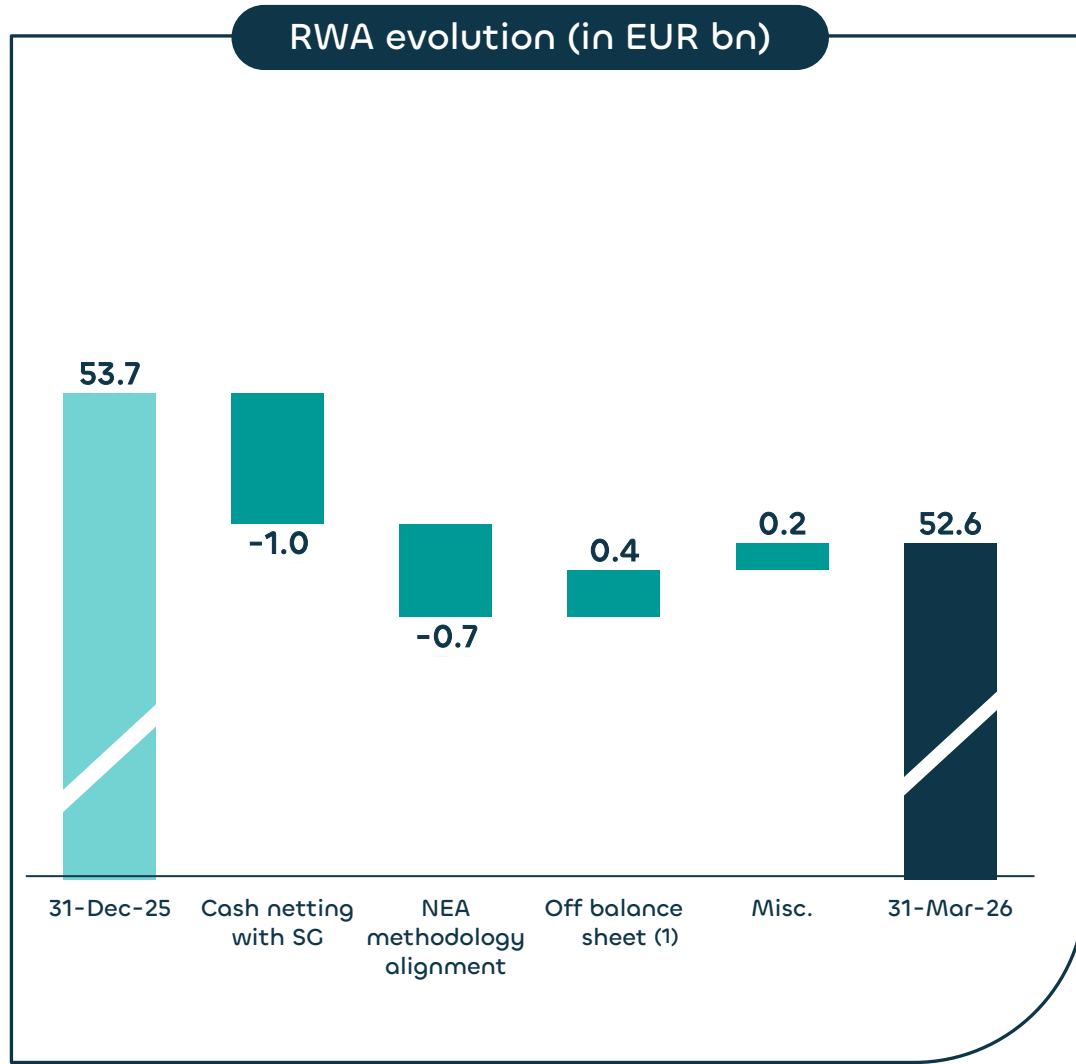


Net income group share ROTE

1. Annualized cost of risk, as a percentage of average earning assets



# Strong capital generation and RWA optimisation



**Large buffer over MDA (454 bps)**

1. Including forward deposit and order book  
 2. Net of distribution provision



# 3 Appendix

# Breakdown of depreciation adjustments

## P&L: Breakdown of depreciation adjustments in UCS

in EUR million	Q1 2026	Q1 2025
Prospective depreciation	-21	-
Reversal of prospective depreciation	-7	-55
Other reversals/impairments <sup>(1)</sup>	19	-
PPA	-	-28
<b>Depreciation adjustments</b>	<b>-10</b>	<b>-83</b>

## Balance sheet: Prospective depreciation stock

	in EUR million
Prospective depreciation 31.12.2025	82
Net charge to Q1 2026 P&L	-28
<b>Prospective depreciation 31.03.2026</b>	<b>53</b>



# Balance sheet as at 31 March 2026

in EUR million	31 March 2026	31 December 2025
Earning assets	52,536	53,045
<i>o/w Rental fleet</i>	50,742	51,168
<i>o/w Finance lease receivables</i>	1,794	1,877
Cash & Cash deposits with the ECB	1,964	2,045
Intangibles (incl. goodwill)	2,728	2,737
Operating lease and other receivables	8,828	8,394
Other	4,537	4,630
<b>Total assets</b>	<b>70,592</b>	<b>70,851</b>
Group shareholders' equity	11,380	11,011
<i>o/w Group shareholders' equity excl. AT1</i>	10,630	10,261
<i>o/w AT1</i>	750	750
<i>Tangible shareholders' equity</i>	7,860	7,499
Non-controlling interests	29	29
<b>Total equity</b>	<b>11,410</b>	<b>11,040</b>
Deposits	14,815	14,308
Financial debt	35,364	36,379
Trade and other payables	5,782	5,867
Other liabilities	3,221	3,256
<b>Total liabilities and equity</b>	<b>70,592</b>	<b>70,851</b>



# Q1 2026 financial results

in EUR million	Q1 2026	Q1 2025	Var. Q1 2026 vs. Q1 2025	Var. % Q1 2026 vs. Q1 2025
<b>Total contracts ('000)</b>	<b>3,077</b>	<b>3,239</b>	<b>(162)</b>	<b>-5.0%</b>
<i>Full service leasing contracts</i>	2,494	2,578	(84)	-3.3%
<i>Fleet management contracts</i>	583	662	(79)	-11.9%
Leasing margin	350.3	265.1	85.2	32.2%
Services margin	407.0	443.3	(36.3)	-8.2%
<b>Leasing &amp; Services margins</b>	<b>757.3</b>	<b>708.4</b>	<b>49.0</b>	<b>6.9%</b>
Used car sales (UCS) result	68.5	193.4	(124.8)	-64.6%
Depreciation adjustments	(9.8)	(82.7)	72.9	-88.2%
<b>UCS result and Depreciation adjustments</b>	<b>58.7</b>	<b>110.6</b>	<b>(51.9)</b>	<b>-46.9%</b>
<b>Gross Operating Income</b>	<b>816.1</b>	<b>819.0</b>	<b>(2.9)</b>	<b>-0.4%</b>
Total operating expenses	(422.4)	(472.8)	50.5	-10.7%
Cost of risk	(25.5)	(30.7)	5.2	-16.9%
Other income/(expense)	(4.3)	(1.0)	(3.3)	n.a.
<b>Operating result</b>	<b>363.9</b>	<b>314.5</b>	<b>49.4</b>	<b>15.7%</b>
Net result from equity method	1.1	1.6	-0.5	-29.5%
<b>Profit before tax</b>	<b>365.0</b>	<b>316.0</b>	<b>49.0</b>	<b>15.5%</b>
Income tax expense	(98.6)	(94.9)	(3.7)	3.9%
Non-controlling interests	0.0	(1.2)	1.2	101.9%
<b>Net Income group share</b>	<b>266.5</b>	<b>219.9</b>	<b>46.5</b>	<b>21.2%</b>



# Earnings per share (EPS)

Basic EPS	Q1 2026	Q1 2025
Existing shares	783,862,091	816,960,428
Shares allocated to cover stock options and shares awarded to staff	(218,239)	(432,602)
Treasury shares in liquidity contracts	(137,436)	(163,293)
<b>End of period number of shares</b>	<b>783,506,416</b>	<b>816,364,533</b>
<b>Weighted average number of shares used for EPS calculation (A)</b>	<b>783,342,787</b>	<b>816,163,003</b>
<i>in EUR million</i>		
Net income group share	266.5	219.9
Deduction of interest on AT1 capital	(18.1)	(18.7)
Net income group share after deduction of interest on AT1 capital (B)	248.4	201.3
<b>Basic EPS (in EUR) (B/A)</b>	<b>0.32</b>	<b>0.25</b>

Diluted EPS	Q1 2026	Q1 2025
Existing shares	783,862,091	816,960,428
Shares issued for no consideration <sup>(1)</sup>	21,058,534	19,530,557
<b>End of period number of shares</b>	<b>804,920,625</b>	<b>836,490,985</b>
<b>Weighted average number of shares used for EPS calculation (A')<sup>(1)</sup></b>	<b>805,246,549</b>	<b>835,640,591</b>
<b>Diluted EPS (in EUR) (B/A')</b>	<b>0.31</b>	<b>0.24</b>



# Return on tangible equity (ROTE)

in EUR million	Q1 2026	Q1 2025
Group shareholders' equity	11,380.3	11,350.7
AT1 Capital	(750.0)	(750.0)
Interest on AT1 capital	(55.2)	(56.2)
Distribution provision <sup>(1)</sup>	(586.7)	(402.9)
OCI excluding conversion reserves	(32.7)	11.6
<b>Equity base for ROE end of period</b>	<b>9,955.7</b>	<b>10,153.2</b>
Goodwill	2,127.5	2,128.3
Intangible assets	600.3	659.6
Average equity base for ROE calculation	9,860.7	10,103.3
Average Goodwill	2,127.5	2,128.3
Average Intangible assets	604.8	661.3
<b>Average tangible equity for ROTE calculation</b>	<b>7,128.5</b>	<b>7,313.8</b>
Net income group share	266.5	219.9
Interest on AT1 capital	(18.1)	(18.7)
<b>Adjusted net income group share</b>	<b>248.4</b>	<b>201.3</b>
<b>ROTE</b>	<b>13.9%</b>	<b>11.0%</b>



# Tangible book value per share

in EUR million	31 March 2026	31 December 2025
Group shareholders' equity	11,380.3	11,010.6
AT1 capital	(750.0)	(750.0)
Interest on AT1 capital	(55.2)	(37.2)
Book value of treasury shares	12.6	12.3
<b>Net Asset Value (NAV)</b>	<b>10,587.6</b>	<b>10,235.8</b>
Goodwill	(2,127.5)	(2,127.5)
Intangible assets	(600.3)	(609.2)
<b>Net Tangible Asset Value (NTAV)</b>	<b>7,859.8</b>	<b>7,499.1</b>
Distribution provision	(586.7)	(462.5)
<b>NTAV after dividend provision<sup>(1)</sup></b>	<b>7,273.1</b>	<b>7,036.7</b>
Number of shares <sup>(2)</sup>	783,506,416	783,179,157
NAV per share	13.51	13.07
NTAV per share	10.03	9.58
NTAV per share after distribution provision	9.28	8.98

21 1. Assuming dividend payout ratio of 50% of adjusted net income group share  
 2. The number of shares considered is the number of ordinary shares outstanding at end of period, excluding treasury shares



# CRR3/CRD6 prudential capital ratios and RWA

in EUR million	31 March 2026	31 December 2025
Group shareholders' equity	11,380	11,011
AT1 capital	(750)	(750)
Distribution provision <sup>(1)</sup> & interest on AT1 capital	(642)	(500)
Goodwill and intangible assets	(2,728)	(2,737)
Deductions and regulatory adjustments	32	75
<b>Common Equity Tier 1 capital</b>	<b>7,293</b>	<b>7,099</b>
AT1 capital	750	750
<b>Tier 1 capital</b>	<b>8,043</b>	<b>7,849</b>
Tier 2 capital	1,500	1,500
<b>Total capital (Tier 1 + Tier 2)</b>	<b>9,543</b>	<b>9,349</b>
<b>Risk-Weighted Assets</b>	<b>52,583</b>	<b>53,745</b>
Credit Risk Weighted Assets	48,664	49,889
Market Risk Weighted Assets	970	915
Operational Risk Weighted Assets	2,949	2,942
Common Equity Tier 1 ratio	13.9%	13.2%
Tier 1 ratio	15.3%	14.6%
Total Capital ratio	18.1%	17.4%



# Quarterly series

in EUR million	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Leasing margin	281.2	260.2	231.7	297.7	265.1	307.7	345.8	345.2	350.3
Services margin	407.4	426.7	414.8	377.5	443.3	404.4	430.4	402.1	407.0
<b>Leasing and Services margins</b>	<b>688.6</b>	<b>686.9</b>	<b>646.5</b>	<b>675.2</b>	<b>708.4</b>	<b>712.1</b>	<b>776.2</b>	<b>747.3</b>	<b>757.3</b>
Used Car Sales (UCS) result	252.0	234.0	222.3	199.6	193.4	180.9	154.9	98.9	68.5
Depreciation adjustments	(147.5)	(136.3)	(145.2)	(162.0)	(82.7)	(38.4)	(80.2)	(16.0)	(9.8)
<b>UCS result and Depreciation adjustments</b>	<b>104.5</b>	<b>97.7</b>	<b>77.2</b>	<b>37.7</b>	<b>110.6</b>	<b>142.5</b>	<b>74.8</b>	<b>82.9</b>	<b>58.7</b>
<b>Gross operating income</b>	<b>793.1</b>	<b>784.5</b>	<b>723.7</b>	<b>712.9</b>	<b>819.0</b>	<b>854.7</b>	<b>851.0</b>	<b>830.3</b>	<b>816.1</b>
Total operating expenses	(489.6)	(475.3)	(459.9)	(474.6)	(472.8)	(446.8)	(429.2)	(477.2)	(422.4)
Impairment charges on receivables	(33.1)	(30.5)	(28.8)	(36.1)	(30.7)	(27.2)	(27.5)	(27.5)	(25.5)
Other income/(expense)	9.0	(1.2)	(7.3)	(2.7)	(1.0)	3.2	(6.3)	(8.6)	(4.3)
Net result from equity method	1.5	2.3	2.0	4.4	1.6	1.7	1.5	1.5	1.1
<b>Profit before tax</b>	<b>280.9</b>	<b>279.9</b>	<b>229.7</b>	<b>203.9</b>	<b>316.0</b>	<b>385.6</b>	<b>389.5</b>	<b>318.4</b>	<b>365.0</b>
Income tax expense	(88.4)	(71.4)	(81.6)	(42.7)	(94.9)	(113.7)	(115.8)	(85.6)	(98.6)
Non-controlling interests	(11.1)	(12.5)	(1.4)	(1.6)	(1.2)	(0.6)	(1.1)	(1.0)	(0)
<b>Net income group share</b>	<b>181.3</b>	<b>195.9</b>	<b>146.7</b>	<b>159.7</b>	<b>219.9</b>	<b>271.3</b>	<b>272.7</b>	<b>231.9</b>	<b>266.5</b>

in '000	Q1 2024	Q2 2024	Q3 2024	Q4 2024 <sup>(1)</sup>	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
<b>Total Contracts</b>	<b>3,386</b>	<b>3,373</b>	<b>3,332</b>	<b>3,281</b>	<b>3,239</b>	<b>3,204</b>	<b>3,193</b>	<b>3,175</b>	<b>3,077</b>
Full service leasing contracts	2,699	2,686	2,653	2,609	2,578	2,557	2,539	2,525	2,494
Fleet management contracts	686	686	680	672	662	648	654	650	583



# Yearly series

in EUR million	2017	2018	2019	2020	2021	2022	2023	2024	2025
Leasing margin	558.1	613.1	643.7	643.4	683.0	758.8	775.5	1,070.7	1,263.7
Services margin	593.0	616.7	632.3	652.0	650.0	715.1	1,250.9	1,626.5	1,680.3
<b>Leasing and Services margins</b>	<b>1,151.1</b>	<b>1,229.8</b>	<b>1,276.0</b>	<b>1,295.4</b>	<b>1,333.0</b>	<b>1,473.9</b>	<b>2,026.4</b>	<b>2,697.2</b>	<b>2,944.0</b>
<i>Used Car Sales (UCS) result</i>	<i>165.3</i>	<i>102.5</i>	<i>75.0</i>	<i>61.1</i>	<i>437.7</i>	<i>747.6</i>	<i>1,078.5</i>	<i>907.9</i>	<i>628.1</i>
<i>Depreciation adjustments</i>	<i>16.4</i>	<i>10.7</i>	<i>20.4</i>	<i>(39.0)</i>	<i>49.8</i>	<i>422.4</i>	<i>(195.4)</i>	<i>(590.9)</i>	<i>(217.3)</i>
<b>UCS result and Depreciation adjustments</b>	<b>181.7</b>	<b>113.2</b>	<b>95.4</b>	<b>22.1</b>	<b>487.5</b>	<b>1,170.0</b>	<b>883.1</b>	<b>317.1</b>	<b>410.9</b>
<b>Gross operating income</b>	<b>1,332.8</b>	<b>1,343.0</b>	<b>1,371.4</b>	<b>1,317.5</b>	<b>1,820.6</b>	<b>2,643.9</b>	<b>2,909.5</b>	<b>3,014.3</b>	<b>3,354.9</b>
Total operating expenses	(598.0)	(617.6)	(635.0)	(633.7)	(675.1)	(882.7)	(1,591.6)	(1,899.3)	(1,826.1)
Impairment charges on receivables	(22.4)	(37.8)	(45.0)	(71.1)	(24.8)	(46.1)	(70.7)	(128.5)	(112.8)
Other income/(expense)	-	-	-	-	-	(50.6)	(28.7)	(2.2)	(12.6)
Net result from equity method	1.2	1.5	1.8	1.9	(1.9)	1.7	6.4	10.1	6.3
<b>Profit before tax</b>	<b>713.6</b>	<b>689.1</b>	<b>693.2</b>	<b>614.6</b>	<b>1,118.7</b>	<b>1,666.1</b>	<b>1,224.9</b>	<b>994.3</b>	<b>1,409.6</b>
Income tax expense	(140.4)	(126.8)	(122.2)	(108.9)	(238.6)	(446.0)	(359.3)	(284.2)	(410.0)
Result from discontinued operations	-	-	-	10.0	-	-	(77.6)	-	-
Non-controlling interests	(5.6)	(6.6)	(6.8)	(5.8)	(7.1)	(4.7)	(27.9)	(26.6)	(3.8)
<b>Net income group share</b>	<b>567.6</b>	<b>555.7</b>	<b>564.2</b>	<b>509.8</b>	<b>873.0</b>	<b>1,215.5</b>	<b>760.1</b>	<b>683.6</b>	<b>995.8</b>

in '000	2017	2018	2019	2020	2021	2022	2023	2024 <sup>(1)</sup>	2025
<b>Total contracts</b>	<b>1,511</b>	<b>1,663</b>	<b>1,765</b>	<b>1,758</b>	<b>1,726</b>	<b>1,806</b>	<b>3,420</b>	<b>3,281</b>	<b>3,175</b>
<i>Full service leasing contracts</i>	<i>1,179</i>	<i>1,299</i>	<i>1,389</i>	<i>1,372</i>	<i>1,427</i>	<i>1,464</i>	<i>2,709</i>	<i>2,609</i>	<i>2,525</i>
<i>Fleet management contracts</i>	<i>332</i>	<i>365</i>	<i>376</i>	<i>386</i>	<i>299</i>	<i>342</i>	<i>710</i>	<i>672</i>	<i>650</i>



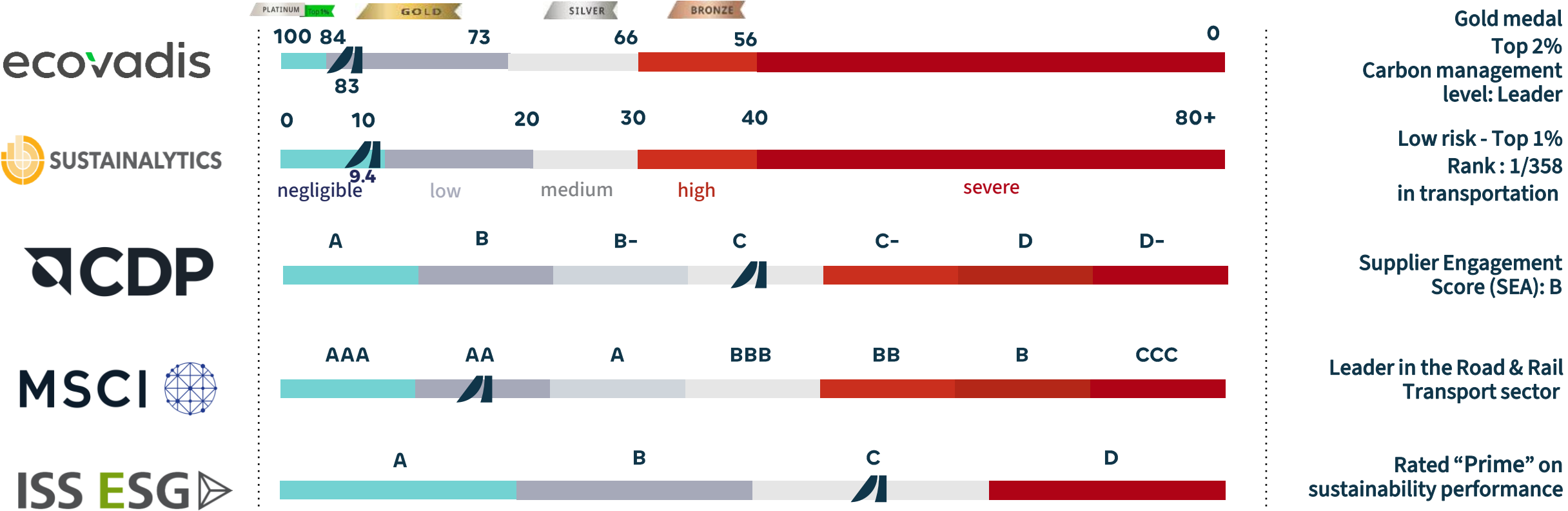
# Glossary

<b>BEV</b>	Battery Electric Vehicles
<b>Earning assets</b>	Net carrying amount of the rental fleet plus net receivables from finance leases
<b>EV</b>	Electric Vehicles
<b>ICE</b>	Internal Combustion Engine: Petrol and Diesel
<b>Hybrids</b>	Mild and full hybrid vehicles
<b>MDA</b>	Maximum Distributable Amount
<b>Other powertrains</b>	LPG, Gas and CNG, Bi-Fuel and Flex Fuel
<b>PHEV</b>	Plug-in Hybrid Electric Vehicles



# ESG ratings: recognition of Ayvens ESG performance

Agencies      Best      ←      Score      →      Worst      Position versus peers




**Near-term and Net-Zero CO<sub>2</sub> emissions targets were validated by SBTi in March 2026.**



# Agenda

- 2 Annual General Meeting  
13 May 2026
- 3 Dividend detachment  
20 May 2026
- 4 Dividend payment  
22 May 2026
- 5 Q2 2026 results  
30 July 2026
- 6 Capital Markets Day (London)  
21 September 2026
- 7 Q3 2026 results  
29 October 2026

