

Feb. 13, 2025

Full-year results 2024

#LegrandImprovingLives

 legrand®

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Highlights

Highlights

Legrand fully achieved its 2024 annual targets

- Sales growth : +3.9% (organic and acquisitions)
- Adjusted operating margin : 20.5% of sales (after acquisitions)
- Net profit attributable to the Group : 13.5% of sales
- Free Cash Flow : €1.3 billion, 14.9% of sales
- CSR roadmap achievement rate : 113% in 2024

The Group is on track to meet 2030 ambitions

- Strong growth in datacenter business which now represents ~20% of sales (proforma¹)
- 9 acquisitions announced over 12 months, including 1 announced today
- Very steady stream of new product launches
- Increased customer satisfaction rates

2025: Legrand aims to accelerate growth




- Sales growth (organic and acquisitions) : +6% to +10%

1. After taking into consideration 12 months of turnover for the companies acquired over the year



2024 full-year results

2024 - Legrand fully achieved its 2024 annual targets

	2024 TARGETS ¹	2024 ACHIEVEMENT		
Sales growth	Low Single Digit Organic + M&A	+3.9% Organic + M&A		Adverse building market conditions Dynamic M&A High growth in datacenters
Adjusted Ebit margin	Initial in Feb. 2024 20.0% to 20.8% of sales <u>before</u> acquisitions	20.6% of sales <u>before</u> acquisitions		Wages inflations Pricing power & productivity Investment in R&D & restructuring Full absorption of M&A dilution
	Specified in Nov. 2024 20.0% to 20.4% of sales <u>after</u> acquisitions	20.5% of sales <u>after</u> acquisitions		
CSR achievement rate	≥100% For 2024	113% For 2024		Numerous 2024 initiatives supporting value creation

1. For more information, see Legrand's press releases dated February 15, 2024 and November 7, 2024

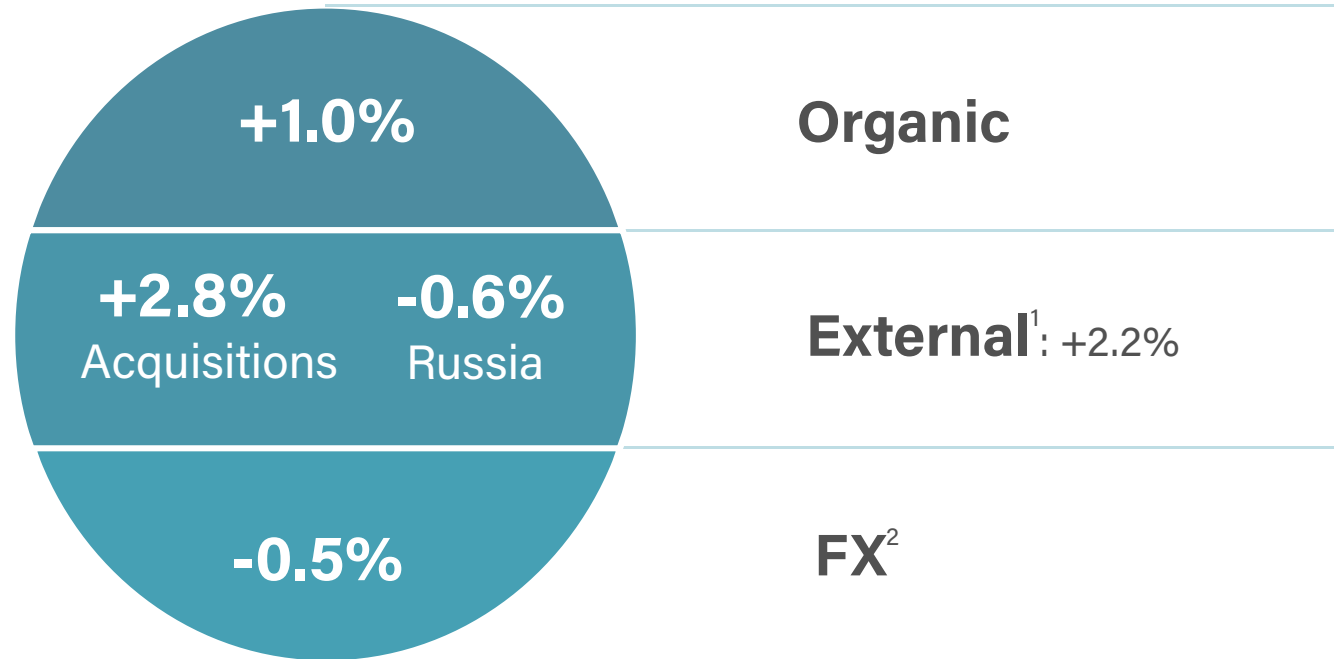
2024 - Change in net sales

€ millions



+3.9%

Organic + acquisitions



1. Based on acquisitions announced the overall impact should be, in 2025, close to +4% full year

2. Based on the average exchange rates in January 2025 alone, the full-year exchange-rate effect on sales should be around +1.5% in 2025.

2024 - Organic sales trends by destination

EUROPE 40.0% OF GROUP

-2.3%

Building market in retreat in most countries

Mature countries -3.1%
(34.8% of Group)

Italy and Spain holding up well
Sales decline in France or the UK

New economies +3.4%

Growth in Turkey
Good resilience in Eastern Europe

NORTH & CENTRAL AMERICA 40.1% OF GROUP

+4.5%

United States +5.7%
(37.0% of Group)

Marked success of datacenter offerings

Mexico & Canada

Sales decline

REST OF THE WORLD 19.9% OF GROUP

+1.3%

Asia-Pacific -2.7%
(12.1% of Group)

- Good growth in India
- Sharp fall in China

Africa-Middle East +6.9%
(3.7% of Group)

- Sales up sharply in the M.E.
- Rise in Africa

South America +8.8%
(4.1% of Group)

Marked growth in Brazil and Chile

Organic growth +1% o/w Datacenters ~+15%

2024 - Adjusted operating margin

2023	Adjusted operating margin	21.0%
	Organic evolution of margin	-0.4 pts
2024	Adjusted operating margin before acquisitions ¹	20.6%
	Impact of acquisitions	-0.1 pts
2024	Adjusted operating margin	20.5%

High profitability demonstrates
i) the quality of Legrand's **commercial positions** and
ii) its strong **ability to deliver**
in a market environment that remained complex in 2024

1. At 2023 scope of consolidation

2024 - Value creation

NET PROFIT ATTRIBUTABLE TO THE GROUP

€1,166MM

13.5% of sales

Increase in operating profit
Negative impact of financial result & FX
25.9% stable corporate income tax rate

FREE CASH FLOW

€1,290MM

14.9% of sales

Conversion rate¹ 111%

1. Free cash flow / Net profit attributable to the Group

2024 - Solid balance sheet

NET DEBT TO EBITDA¹ RATIO

1.5x
in 2024

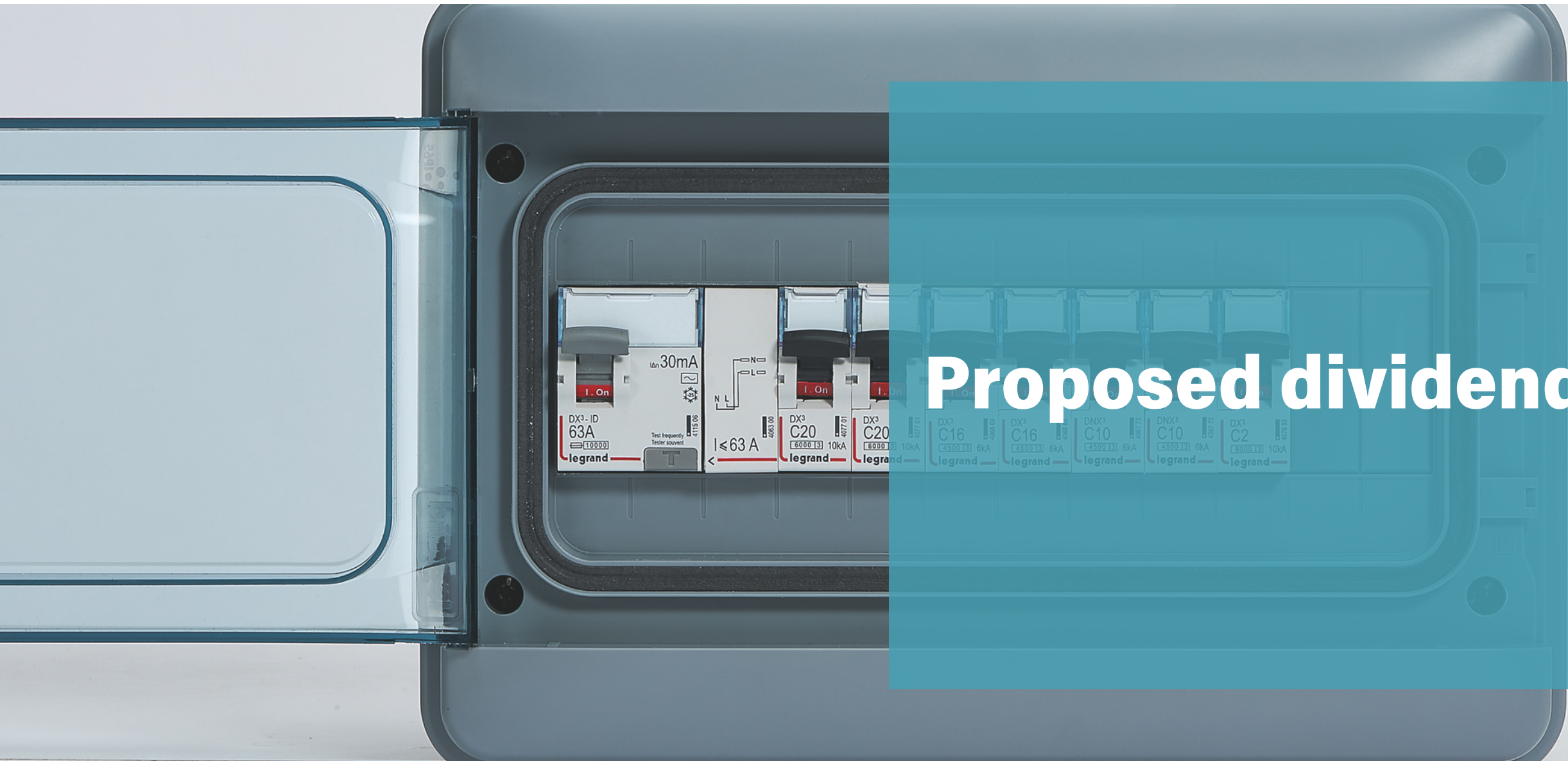
DEBT STRUCTURE

Net debt
€3.0bn

Gross Debt ~90% fixed rate & 4.8 years maturity

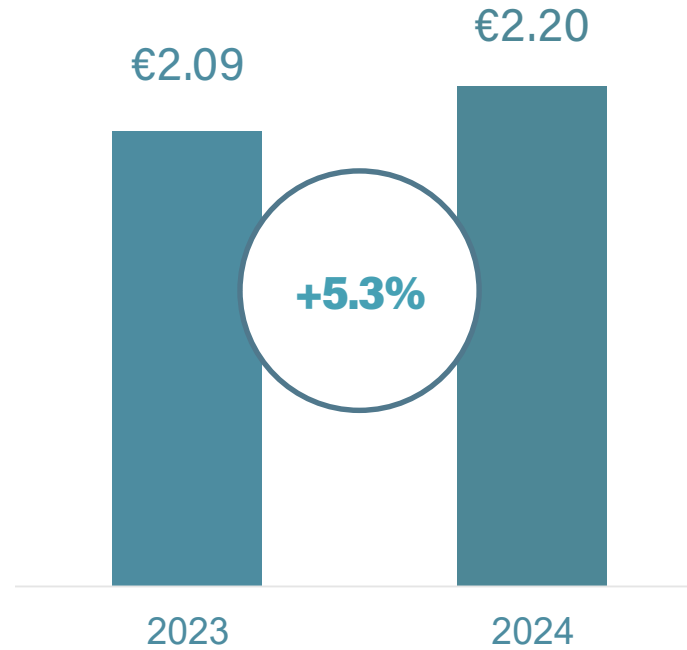
€2.1bn available cash

1. Based on EBITDA in the last twelve months




Proposed dividend

2024 - Dividend¹ in line with capital allocation policy



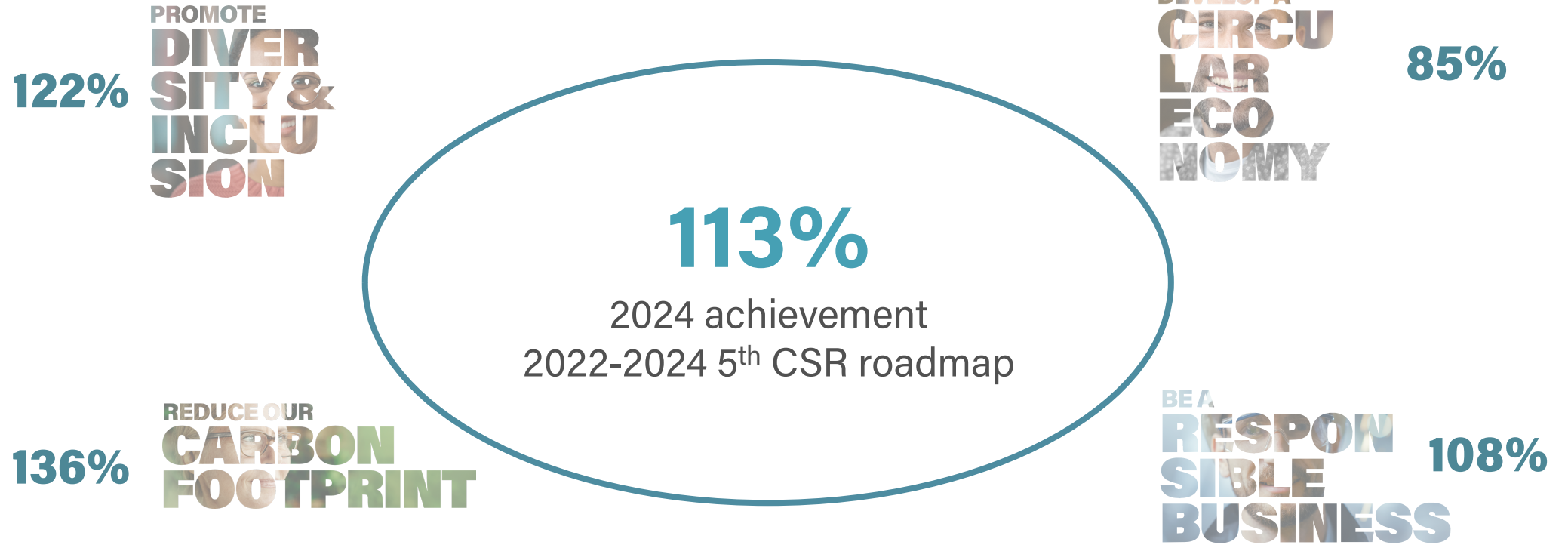
Proposal close to 50% payout

1. Subject to the approval of shareholders at General Meeting on May 27, 2025 and payable on June 2, 2025
This distribution will be made in full out of the distributable income



2024 CSR performance

2024 CSR performance - Roadmap's achievement rates



CMD to present 2025-2027 6th CSR roadmap: March 25, 2025

2024 CSR performance - Examples of achievements

DIVERSITY & INCLUSION



30.5% feminized management¹

94% employees in GEEIS-Diversity² labeled entities

Close to 4,300 new opportunities provided for early-in-careers

CARBON FOOTPRINT



-53% direct carbon emissions (current Scopes 1&2, over 3 years), far better than targeted

~330 key suppliers committed to **reducing** their **CO₂ emissions**

CIRCULAR ECONOMY



~10% recycled plastics and **~44% recycled metals** in products

75% of sales with product environmental information for customers (PEP)


RESPONSIBLE BUSINESS




96% employees trained ≥7hours

-26% workplace accidents over 3 years

98% achievement on Business Ethics

 **Stake in Circul'R**
 French company specializing in circular economy expertise and consulting





Mid-term outlook

Reminder of 2030 ambitions

Sales

€12bn to €15bn in 2030
+6% to +10% CAGR (combining organic and M&A)

Adjusted Ebit margin¹

~20% of sales
organic improvement offsetting M&A dilution

Free Cash Flow

~€10bn from 2025 to 2030
13% to 15% of sales in average

Capital allocation

M&A **~€5bn invested** from 2025 to 2030
Dividend **~50%** of net income payout

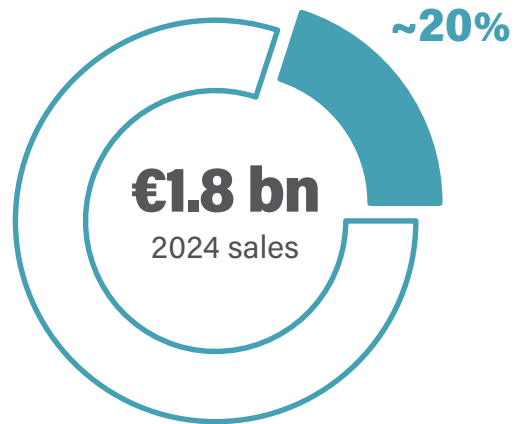
Eco-responsible sales

80% of sales
Emissions reduction in line with Net Zero commitment

1. All-in adjusted Ebit margin: including restructuring costs

Datacenters: ~20% (proforma¹) of our 2024 sales

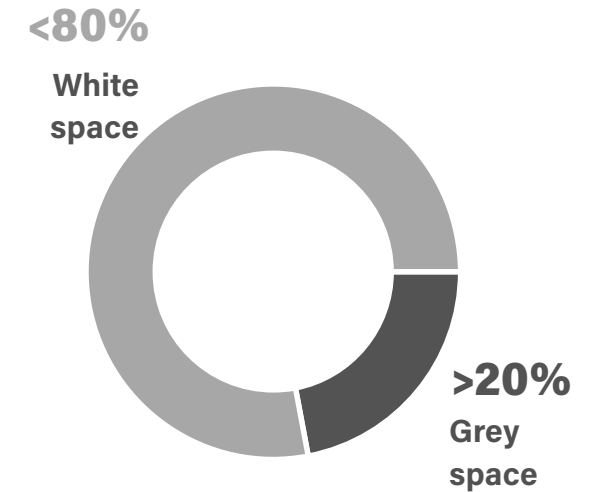
% OF GROUP SALES



BY REGION



BY SPACE

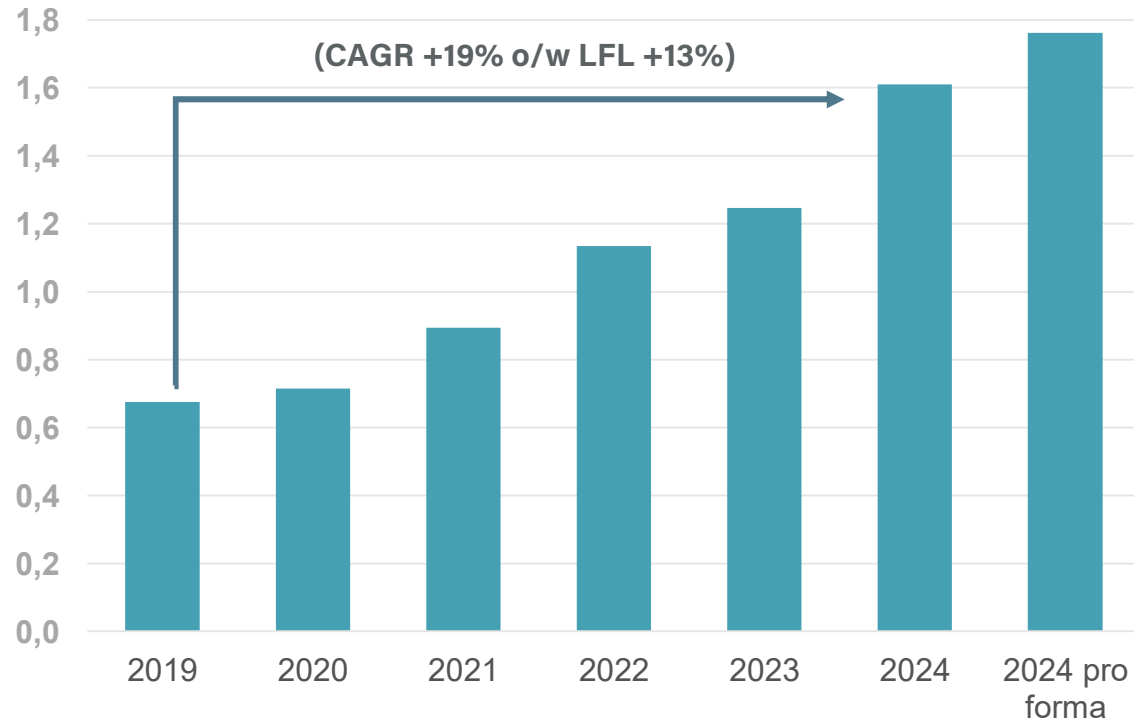


1. 2024 proforma after taking into consideration 12 months of turnover for the companies acquired over the year
2024 actual figures: <20% of Group Sales / 68% NCA – 20% Europe – 12% Rest of the World / 15% Grey Space

Datacenters: Rapid sales growth and vitality

RAPID SALES GROWTH OVER 5 YEARS

Datacenter Sales in € bn



QUARTERLY SALES TREND AND BOOK-TO-BILL VITALITY

	2024	Q1	Q2	Q3	Q4
Sales trend LFL yoy	-	+	++	+++	+++
Book-to-Bill	>1 for each quarter				

Datacenters: Our strategy

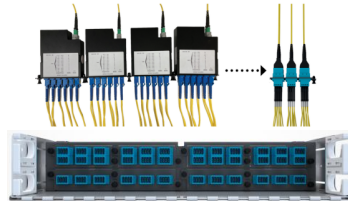
Building a best of breed suite of technological solutions for mission critical applications to improve datacenter efficiency and sustainability

AI-READY OFFER



E.g.: USystems rear door heat exchanger can cool up to 200 kW in a single rack through a closed loop water circuit, ensuring optimum thermal & energy performances. No specialist infrastructure needed, fitted to standard racks, retrofit capability, occupies small footprint, easy to install, simple to roll out.

BEST OF BREED TECHNOLOGY



E.g.: Infinium acclAIM fiber system offering high-speed data transmission in the most energy-efficient and sustainable manner possible. Introducing direct mating breakout connections (instead of cassette entirely), resulting in a system that offers near-lossless mating and almost unlimited scalability.

DCIM/BMS AGNOSTIC



E.g.: Raritan PX4 smart PDU which works with all kinds of DCIM. High Density Outlet Technology design to provide space for more outlets in a PDU. Intuitive outlet & power cord locking system. Hybrid C13 & C19 outlet accommodating both C20 & C14 power cables in a single flexible outlet.

FOR ALL TYPE OF DATACENTER



E.g.: Legrand DMX3, DPX, DX with integrated measurement, tailor-made protection up to 6,300 A and optimum continuity of service for all types of datacenters. Measurement, diagnostics, and monitoring: 3 actions applied to energy consumption helping making real savings.

Datacenters: Best-in-class mission-critical solutions

WHITE SPACE

BUSWAY



Revolutionary busway modular system

RACKS



From standard to optimized airflow to AI ready heavy duty racks

EZ-PATH®



Optimal protection against fire spreading, any cables load factor

KVM & SERIAL CONSOLES



High performance, reliable, secure monitoring of datacenter infrastructure

OVERHEAD CABLE MANAGEMENT



Customized solutions using strong, cleverly-designed cable trays from wire-mesh to heavy duty solutions

TRANSCEIVERS



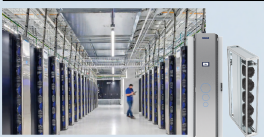
Interoperability, availability and reliability from copper to fiber

SMART PDU



Provides reliable power distribution for IT equipment racks, offers metering and remote monitoring

COOLING



From optimized air flow management, cold corridors to rear-door heat exchangers

CONTAINMENT



Flexible and modular containment solutions

STATIC TRANSFER SWITCH



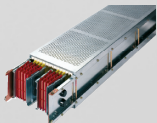
Ensure uninterrupted operation for critical IT equipment

OPTICAL FIBER & COPPER CABLING SYSTEMS



Complete solutions designed to deliver the most advanced network performance, with a variety of density and connector options for maximum compatibility

BUSBARS



Busbar systems offering simplicity, speed and flexibility during planning and installation

MAIN DISTRIBUTION BOARD, CABINETS & PROTECTION DEVICES



Reliable energy distribution, metering and protection solutions ensuring continuity of service

UPS



Power continuity and quality with 1P to modular 3P solutions including power factor correction

TRANSFORMERS



Wide portfolio of high-quality, environmentally friendly cast resin transformers range from 50kVA up to 20MVA

GREY SPACE

Datacenters: 2024 flagship projects examples

Customized solutions meeting the most demanding infrastructures



USA - Worldwide

US based global software and technology leader

White Space ~\$100M on>1year
PDU's, racks, connectivity

End-user: US, contractors: Worldwide

Legrand: customized solutions designed for secure, high performance environments and compatibility with a wide range of compute and network technology

Key Success Factors: Global project support, custom manufacturing capability, and proven technology



Germany Colocation

Leading datacenter operator

White Space ~€5M
Busways, Racks, PDU's, containment, sensors

End-user: many (tech, banks, telecom)

Legrand: customized products supplied from various countries

Key Success Factors: End-user relationship, tight coordination to meet deadlines



Malaysia 100MW Hyperscale

US Tech giant

White Space ~\$40M
Cable management, PDU's, busways, busbars, containment

End-user: US, Main-contractor: Malaysia, Engineering: Singapore

Legrand: customized products supplied from all continents, containment installation service

Key Success Factors: Key account approach. Ability to meet specifications, responsiveness and adaptability to customer's design updates. Global coordination on all incl. supply chain



USA - AI training

US technology leader AI platform training

White Space ~\$20M
Custom cabinets & rear door cooling

End-user: Diverse tech, customer: AI large language model training

Legrand: customized cabinet design, engineering, manufacturing and high efficiency cooling

Key Success Factors: turn key integrated solution designed for demanding AI applications, manufacturing and supply chain agility



Spain Colocation

US Tech giant

White Space >€1M
Racks, containment, cable management

End-user: US, contractor, Engineering: Spain

Legrand: products through trusted partners and installers

Key Success Factors: Europe Legrand Datacenter team coordination. Stakeholders' intimacy based on track record. End-user Approved Vendor List



Chile 13MW Colocation PoP

Leading datacenter owner across Latin America

Grey Space ~\$3M
Power Panels










End-user: Brazil, Main-contractor: Brazil, Engineering: Costa Rica

Legrand+Teknica Chile: products, customization, integration, installation, commissioning, 7x24 after sales services

Key Success Factors: reputation and track record with all certifications, complete pack of service, agility in highly customizing the solution (specifications + local regulation)

Acceleration of Legrand's acquisition policy

9 acquisitions announced over 12 months, 2024 totaling ~€430mm annual sales

	ACQUISITIONS		SALES
Digital Lifestyles (connected care)		Dutch software leader in connected healthcare	>€60mm
		Dutch software player in connected healthcare Announced today	>€20mm
Datacenters		Indian specialist in racks	~€10mm
		Irish specialist in low-voltage power distribution systems	~€120mm
		Australian leader in busbars	<€10mm
		Colombian specialist in the technical infrastructures services	~€30mm
		Leading North American specialist in Cable Bus power busbars	~€70mm
Essential Infrastructures		Australian cable management (conduit) leader	>€100mm
		New Zealand specialist of cable management systems	>€10mm

Acceleration of Legrand's acquisition policy

9 acquisitions announced over 12 months, 2024 totaling ~€430mm annual sales

DATACENTERS

€240MM
acquired sales

Including leading Grey
Space positions in Europe
and North America

DIGITAL LIFESTYLES

Enter the highly promising
**Connected health
market**

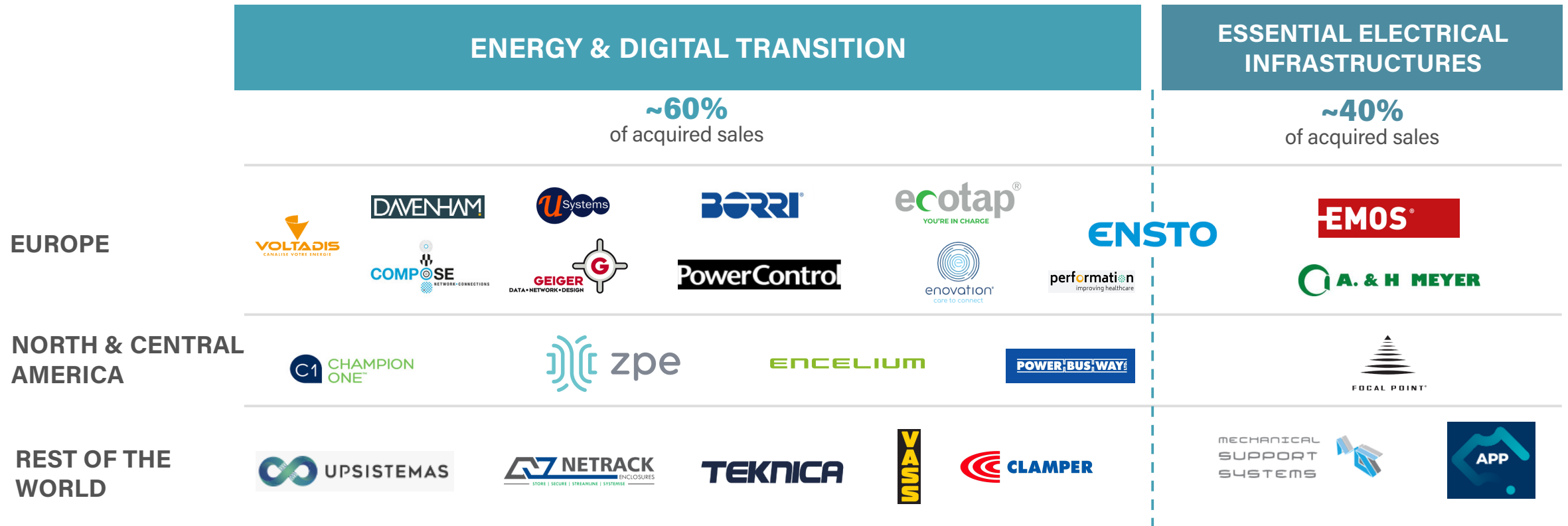
Complementing Legrand's
existing positions
in assisted living

GEOGRAPHY

~X2
sales in
Oceania

M&A balancing sales exposure towards Energy & Digital Transition

25 acquisitions since 2020¹ ~€3.0 bn invested for ~€1.2 bn annual sales



1. 2020 included

Numerous product launches throughout the year

2024 - Products launched in energy and digital transition

ENERGY TRANSITION



Keor MP | Three Phase UPS



DPX



Light Up range



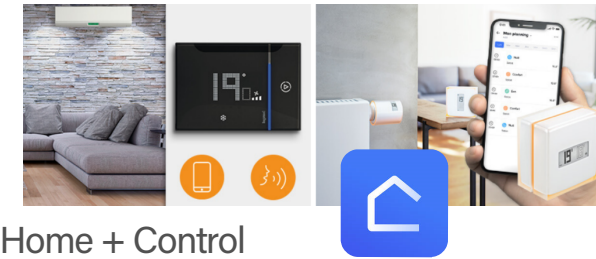
WEOZ™



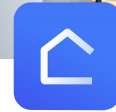
LINEA 5000 with Netatmo



KNX Mallia Senses



Home + Control

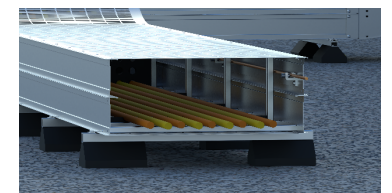


Linkeo PDU



LCS3 Fiber Optic System

DATACENTER



Cable Bus



Cablobend

R&D cash was 4.5% of total 2024 sales

R&D spent (P/L) grew +8% in 2024 vs 2023

Numerous product launches throughout the year

2024 - Products launched in essential infrastructures

ESSENTIAL INFRASTRUCTURES



Céliane™



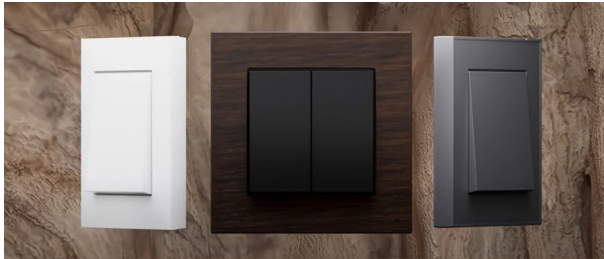
Light Now



Chief Tempo™ flat panel wall mount system



SANUS™ Advanced Full-Motion 4D



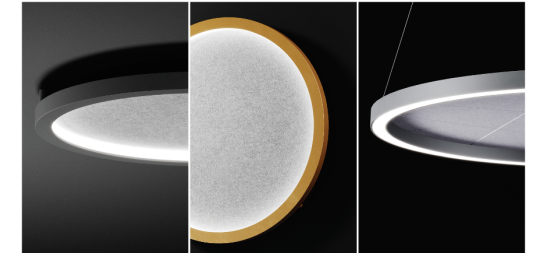
Seano™



Ultra Thin



Linkeo Wall-Mount cabinets

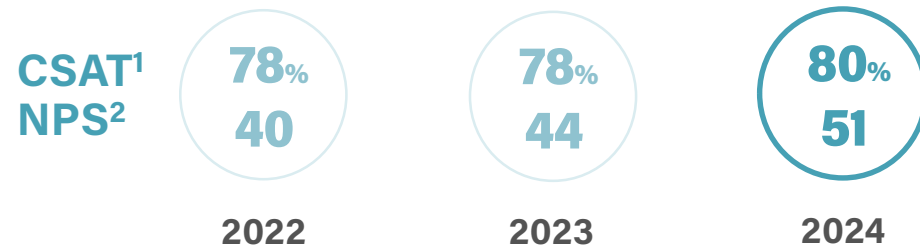


REV Architectural Lighting

R&D cash was 4.5% of total 2024 sales
 R&D spent (P/L) grew +8% in 2024 vs 2023

2024 - Improving customer satisfaction

BEST-IN-CLASS CUSTOMER SATISFACTION



INITIATIVES

~400 k surveyed customers in 77 countries

Closed-Loop Feedback process

Successful initiatives on

- Technical support
- Trainings
- Order to delivery process

Legrand geared to offer the best customer experience

1. CSAT: Customer SATisfaction: number of satisfied and very satisfied customers on number of customers' responses

2. NPS: Net Promoter Score: percentage of promoters minus percentage of detractors. "Great" level from 30



2025 full-year targets

2025 full-year targets

In 2025, the Group will pursue the profitable and responsible development laid out in its strategic roadmap.

Taking into account the world's current macroeconomic outlook and [the customs policies effectively applied as of the date of this publication](#), and with confidence in its model for creating integrated value, Legrand has set the following full-year targets for 2025:

- [sales growth of between +6% and +10%](#) (organic and acquisitions, excluding currency effects);
- [adjusted operating margin¹](#) (after acquisitions) [holding stable overall](#), compared with 2024;
- [at least 100% CSR achievement](#) rate for the first year of the 2025-2027 roadmap².

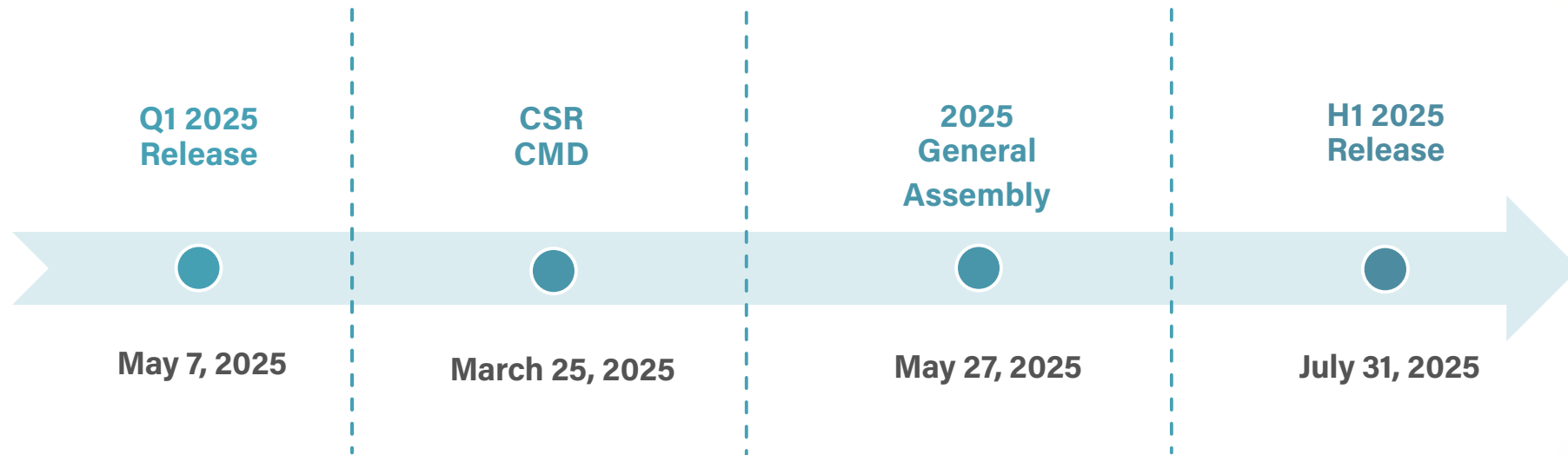
1. All-in adjusted Ebit margin: **including** restructuring costs

2. The pillars of the new CSR roadmap will be detailed at the dedicated virtual CMD on March 25, 2025



Financial agenda & Corporate access

Financial agenda



2025 Corporate access calendar¹

FY 2024 – Roadshows

Date	Broker	Location	Legrand participants
Feb. 14, 2025	Kepler Cheuvreux	Paris	Management (C-suite)
Feb. 17 & 18, 2025	Goldman Sachs	London	Management (C-suite)
Feb. 19, 2025	Bernstein SG	New York	Management (C-suite)
Feb. 19 & 20, 2025	Berenberg	Zurich + Geneva	Management (C-suite)
Feb. 25 & 26, 2025	RBC Capital Markets	Montreal + Toronto	Management (C-suite)
Feb. 25 & 26, 2025	Kepler Cheuvreux	Nordics	Management (C-suite)
Feb. 27, 2025	Bernstein SG	Chicago	Management (C-suite)
Feb. 27, 2025	Oddo BHF	Frankfurt	Management (C-suite)
March 4, 2025	HSBC	Virtual – Asia & Australia	Management (C-suite)
March 6, 2025	Kepler Cheuvreux	Virtual – Nordics	Management (C-suite)

1. Planned dates and participants may change

2025 Corporate access calendar¹

Conferences			
Date	Conference	Location	Legrand participants
Feb. 20, 2025	Barclays – Industrial Select	Miami	Management (C-suite)
Feb. 20, 2025	Citi – Global Industrials Tech & Mobility	Miami	Management (C-suite)
March 12, 2025	CIC Market Solutions – Sales Teaching	Paris	IR Team
March 26, 2025	UBS – Global energy transition	London	Management (C-suite)
May 13, 2025	Oddo BHF - Sustainability forum	Paris	Management (CSR)
May 15, 2025	UBS – Best of Europe virtual	Virtual	IR Team
May 22, 2025	JPMorgan – ESG Call Series	Virtual	Management (CSR)

1. Planned dates and participants may change

2025 Corporate access calendar¹

Conferences			
Date	Conference	Location	Legrand participants
June 3, 2025	Norges - Buy Side global industrials	London	Management (C-suite)
June 4, 2025	BNPP Exane - CEO conference	Paris	Management (C-suite)
June 12, 2025	JPMorgan - European Capital Goods Conference	London	Management (C-suite)
Sept. 2, 2025	Morgan Stanley - CEO Unplugged	London	Management (C-suite)
Sept. 12, 2025	UBS - Quo Vadis Industrials	Virtual	IR Team
Sept. 23, 2025	BNPP Exane - ESG conference	Paris	Management (CSR)
Sept. 24, 2025	Bernstein SG - Industrials conference	London	Management (C-suite)
Dec. 2, 2025	Goldman Sachs - Global industrials	London	Management (C-suite)
Dec. 4, 2025	Bernstein SG - SDC Premium Review conference	Paris	Management (C-suite)
Dec. 9, 2025	CIC Market Solutions - CIC Forum	Paris	IR Team



Appendices

Glossary

Adjusted operating profit is defined as operating profit adjusted for: i/ amortization and depreciation of revaluation of assets at the time of acquisitions and for other P&L impacts relating to acquisitions, ii/ impacts related to disengagement from Russia (impairment of assets and effective disposal) and, iii/ where applicable, impairment of goodwill.

Cash flow from operations is defined as net cash from operating activities excluding changes in working capital requirement.

CSR stands for Corporate Social Responsibility.

EBITDA is defined as operating profit plus depreciation and impairment of tangible and of right of use assets, amortization and impairment of intangible assets (including capitalized development costs), reversal of inventory step-up and impairment of goodwill.

Free cash flow is defined as the sum of net cash from operating activities and net proceeds from sales of fixed and financial assets, less capital expenditure and capitalized development costs.

Net financial debt is defined as the sum of short-term borrowings and long-term borrowings, less cash and cash equivalents and marketable securities.

Normalized free cash flow is defined as the sum of net cash from operating activities—based on a normalized working capital requirement representing 10% of the last 12 months' sales and whose change at constant scope of consolidation and exchange rates is adjusted for the period considered—and net proceeds of sales from fixed and financial assets, less capital expenditure and capitalized development costs.

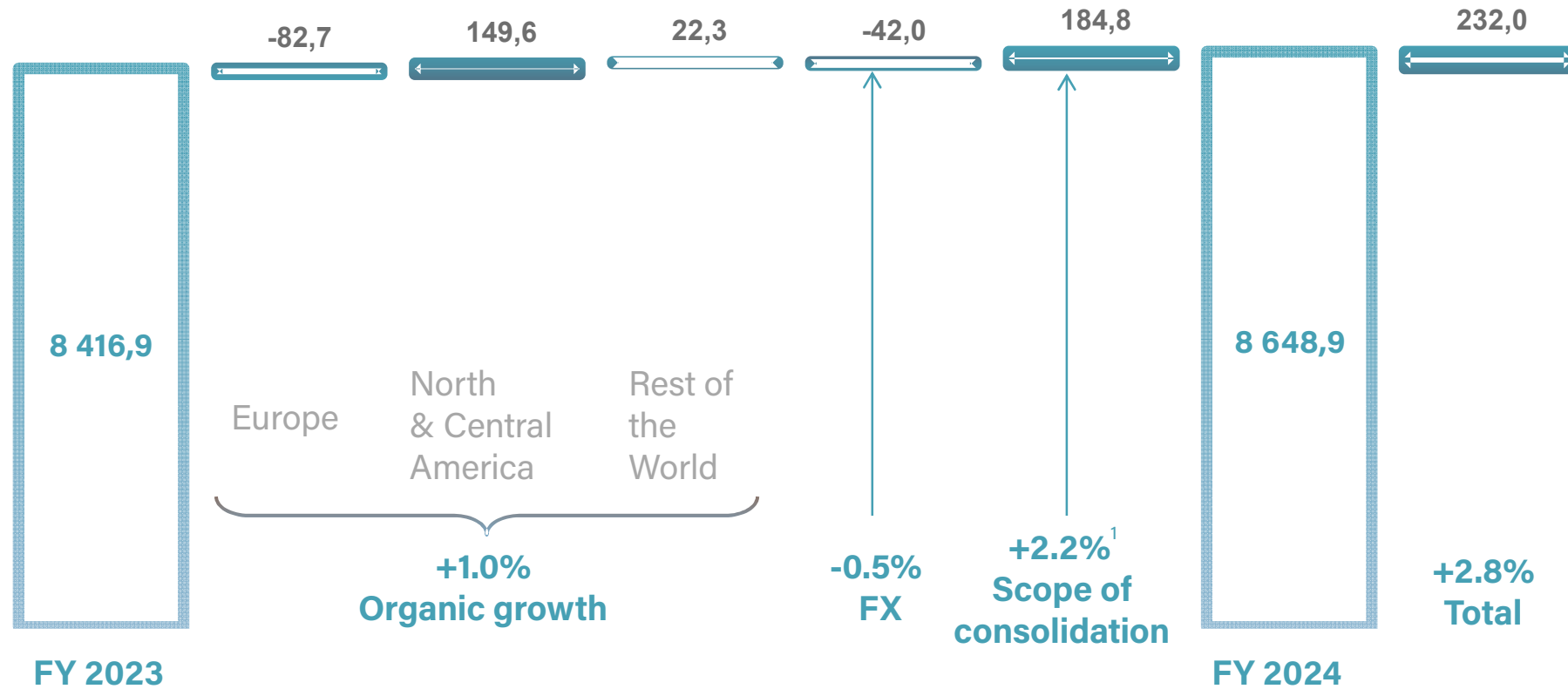
Organic growth is defined as the change in sales at constant structure (scope of consolidation) and exchange rates.

Payout is defined as the ratio between the proposed dividend per share for a given year, divided by the net profit attributable to the Group per share of the same year, calculated on the basis of the average number of ordinary shares at December 31 of that year, excluding shares held in treasury.

Working capital requirement is defined as the sum of trade receivables, inventories, other current assets, income tax receivables and short-term deferred tax assets, less the sum of trade payables, other current liabilities, income tax payables, short-term provisions and short-term deferred tax liabilities.

Change in net sales

Breakdown of change in FY 2024 net sales by destination (€mm)



1. Due to the consolidation of Clamper, Teknica, MSS, ZPE, Netrack, VASS, Enovation, Davenham and negative impact of Russia

2024- net sales by destination⁽¹⁾

In € millions	2023	2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	3,489.5	3,458.4	-0.9%	1.2%	-2.3%	0.3%
North and Central America	3,246.3	3,465.8	6.8%	2.3%	4.5%	-0.1%
Rest of the World	1,681.1	1,724.7	2.6%	4.0%	1.3%	-2.6%
Total	8,416.9	8,648.9	2.8%	2.2%	1.0%	-0.5%

1. Market where sales are recorded

2024 First quarter - net sales by destination⁽¹⁾

In € millions	Q1 2023	Q1 2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	941.1	886.0	-5.9%	-1.0%	-4.7%	-0.2%
North and Central America	811.6	757.9	-6.6%	0.1%	-6.0%	-0.8%
Rest of the World	396.9	384.3	-3.2%	5.9%	-5.8%	-3.0%
Total	2,149.6	2,028.2	-5.6%	0.7%	-5.4%	-1.0%

1. Market where sales are recorded

2024 Second quarter - net sales by destination⁽¹⁾

In € millions	Q2 2023	Q2 2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	893.8	862.9	-3.5%	-2.4%	-1.5%	0.4%
North and Central America	824.7	880.6	6.8%	-0.1%	5.8%	1.0%
Rest of the World	426.7	438.6	2.8%	5.7%	-0.7%	-2.1%
Total	2,145.2	2,182.1	1.7%	0.1%	1.5%	0.1%

1. Market where sales are recorded

2024 Third quarter - net sales by destination⁽¹⁾

In € millions	Q3 2023	Q3 2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	804.6	748.8	-6.9%	-2.8%	-4.1%	-0.1%
North and Central America	819.8	858.4	4.7%	0.0%	6.0%	-1.3%
Rest of the World	388.1	411.5	6.0%	5.6%	3.9%	-3.4%
Total	2,012.5	2,018.7	0.3%	0.0%	1.7%	-1.3%

1. Market where sales are recorded

2024 Fourth quarter - net sales by destination⁽¹⁾

In € millions	Q4 2023	Q4 2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	850.0	960.7	13.0%	11.3%	0.6%	0.9%
North and Central America	790.2	968.9	22.6%	9.4%	11.6%	0.4%
Rest of the World	469.4	490.3	4.5%	-0.4%	7.2%	-2.2%
Total	2,109.6	2,419.9	14.7%	8.0%	6.2%	0.1%

1. Market where sales are recorded

2024 - net sales by origin⁽¹⁾

In € millions	2023	2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	3,652.2	3,634.0	-0.5%	1.4%	-2.2%	0.3%
North and Central America	3,294.9	3,504.7	6.4%	2.0%	4.5%	-0.1%
Rest of the World	1,469.8	1,510.2	2.7%	4.6%	1.3%	-3.0%
Total	8,416.9	8,648.9	2.8%	2.2%	1.0%	-0.5%

1. Zone of origin of the product sold

2024 First quarter - net sales by origin⁽¹⁾

In € millions	Q1 2023	Q1 2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	978.2	918.9	-6.1%	-1.0%	-5.0%	-0.2%
North and Central America	829.2	767.5	-7.4%	0.1%	-6.8%	-0.9%
Rest of the World	342.2	341.8	-0.1%	6.8%	-3.4%	-3.2%
Total	2,149.6	2,028.2	-5.6%	0.7%	-5.4%	-1.0%

1. Zone of origin of the product sold

2024 Second quarter - net sales by origin⁽¹⁾

In € millions	Q2 2023	Q2 2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	936.0	898.4	-4.0%	-2.6%	-1.8%	0.3%
North and Central America	837.4	891.8	6.5%	0.0%	5.4%	1.0%
Rest of the World	371.8	391.9	5.4%	7.1%	0.7%	-2.3%
Total	2,145.2	2,182.1	1.7%	0.1%	1.5%	0.1%

1. Zone of origin of the product sold

2024 Third quarter - net sales by origin⁽¹⁾

In € millions	Q3 2023	Q3 2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	843.3	787.0	-6.7%	-2.8%	-3.8%	-0.2%
North and Central America	831.0	868.9	4.6%	0.0%	5.9%	-1.3%
Rest of the World	338.2	362.8	7.3%	6.9%	4.3%	-3.8%
Total	2,012.5	2,018.7	0.3%	0.0%	1.7%	-1.3%

1. Zone of origin of the product sold

2024 Fourth quarter - net sales by origin⁽¹⁾

In € millions	Q4 2023	Q4 2024	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
Europe	894.7	1,029.7	15.1%	12.3%	1.5%	1.0%
North and Central America	797.3	976.5	22.5%	8.0%	12.9%	0.5%
Rest of the World	417.6	413.7	-0.9%	-1.3%	3.4%	-3.0%
Total	2,109.6	2,419.9	14.7%	8.0%	6.2%	0.1%

1. Zone of origin of the product sold

2024 - P&L

In € millions	2023	2024	% change
Net sales	8,416.9	8,648.9	+2.8%
Gross profit	4,398.9	4,466.1	+1.5%
<i>as % of sales</i>	52.3%	51.6%	
Adjusted operating profit	1,770.2	1,776.0	+0.3%
<i>as % of sales</i>	21.0%	20.5%⁽¹⁾	
(i) Amortization & depreciation of revaluation of assets at the time of acquisitions, other P&L impacts relating to acquisitions, and (ii) Impacts related to disengagement from Russia (impairment of assets and effective disposal)	(178.6)	(133.3)	
Impairment of goodwill	0.0	0.0	
Operating profit	1,591.6	1,642.7	+3.2%
<i>as % of sales</i>	18.9%	19.0%	
Financial income (costs)	(33.4)	(50.9)	
Exchange gains (losses)	(8.6)	(13.9)	
Income tax expense	(401.1)	(409.0)	
Share of profits (losses) of equity-accounted entities	0.0	0.0	
Profit	1,148.5	1,168.9	+1.8%
Net profit attributable to the Group	1,148.5	1,166.4	+1.6%

1. 20.6% excluding acquisitions (at 2023 scope of consolidation)

2024 First quarter - P&L

In € millions	Q1 2023	Q1 2024	% change
Net sales	2,149.6	2,028.2	-5.6%
Gross profit	1,139.5	1,076.2	-5.6%
<i>as % of sales</i>	<i>53.0%</i>	<i>53.1%</i>	
Adjusted operating profit	477.2	415.9	-12.8%
<i>as % of sales</i>	<i>22.2%</i>	<i>20.5%⁽¹⁾</i>	
(i) Amortization & depreciation of revaluation of assets at the time of acquisitions, other P&L impacts relating to acquisitions, and (ii) Impacts related to disengagement from Russia (impairment of assets and effective disposal)	(26.8)	(28.4)	
Impairment of goodwill	0.0	0.0	
Operating profit	450.4	387.5	-14.0%
<i>as % of sales</i>	<i>21.0%</i>	<i>19.1%</i>	
Financial income (costs)	(4.0)	(5.4)	
Exchange gains (losses)	(0.2)	(9.0)	
Income tax expense	(115.8)	(97.0)	
Share of profits (losses) of equity-accounted entities	0.0	0.0	
Profit	330.4	276.1	-16.4%
Net profit attributable to the Group	330.5	275.9	-16.5%

1. 20.6% excluding acquisitions (at 2023 scope of consolidation)

2024 Second quarter - P&L

In € millions	Q2 2023	Q2 2024	% change
Net sales	2,145.2	2,182.1	+1.7%
Gross profit	1,127.9	1,138.0	+0.9%
<i>as % of sales</i>	52.6%	52.2%	
Adjusted operating profit	477.5	457.2	-4.3%
<i>as % of sales</i>	22.3%	21.0%⁽¹⁾	
(i) Amortization & depreciation of revaluation of assets at the time of acquisitions, other P&L impacts relating to acquisitions, and (ii) Impacts related to disengagement from Russia (impairment of assets and effective disposal)	(35.6)	(33.2)	
Impairment of goodwill	0.0	0.0	
Operating profit	441.9	424.0	-4.1%
<i>as % of sales</i>	20.6%	19.4%	
Financial income (costs)	(4.9)	(6.3)	
Exchange gains (losses)	(3.0)	0.3	
Income tax expense	(113.4)	(116.4)	
Share of profits (losses) of equity-accounted entities	0.0	0.0	
Profit	320.6	301.6	-5.9%
Net profit attributable to the Group	320.4	301.7	-5.8%

1. 21.0% excluding acquisitions (at 2023 scope of consolidation)

2024 Third quarter - P&L

In € millions	Q3 2023	Q3 2024	% change
Net sales	2,012.5	2,018.7	+0.3%
Gross profit	1,035.7	1,032.2	-0.3%
<i>as % of sales</i>	<i>51.5%</i>	<i>51.1%</i>	
Adjusted operating profit	408.8	403.0	-1.4%
<i>as % of sales</i>	<i>20.3%</i>	<i>20.0%⁽¹⁾</i>	
(i) Amortization & depreciation of revaluation of assets at the time of acquisitions, other P&L impacts relating to acquisitions, and (ii) Impacts related to disengagement from Russia (impairment of assets and effective disposal)	(27.3)	(24.8)	
Impairment of goodwill			
Operating profit	381.5	378.2	-0.9%
<i>as % of sales</i>	<i>19.0%</i>	<i>18.7%</i>	
Financial income (costs)	2.0	(19.9)	
Exchange gains (losses)	3.6	(7.7)	
Income tax expense	(100.6)	(94.4)	
Share of profits (losses) of equity-accounted entities			
Profit	286.5	256.2	-10.6%
Net profit attributable to the Group	286.3	256.1	-10.5%

1. 20.0% excluding acquisitions (at 2023 scope of consolidation)

2024 Fourth quarter - P&L

In € millions	Q4 2023	Q4 2024	% change
Net sales	2,109.6	2,419.9	+14.7%
Gross profit	1,095.8	1,219.7	+11.3%
<i>as % of sales</i>	<i>51.9%</i>	<i>50.4%</i>	
Adjusted operating profit	406.7	499.9	+22.9%
<i>as % of sales</i>	<i>19.3%</i>	<i>20.7%⁽¹⁾</i>	
(i) Amortization & depreciation of revaluation of assets at the time of acquisitions, other P&L impacts relating to acquisitions, and (ii) Impacts related to disengagement from Russia (impairment of assets and effective disposal)	(88.9)	(46.9)	
Impairment of goodwill			
Operating profit	317.8	453.0	+42.5%
<i>as % of sales</i>	<i>15.1%</i>	<i>18.7%</i>	
Financial income (costs)	(26.5)	(19.3)	
Exchange gains (losses)	(9.0)	2.5	
Income tax expense	(71.3)	(101.2)	
Share of profits (losses) of equity-accounted entities			
Profit	211.0	335.0	+58.8%
Net profit attributable to the Group	211.3	332.7	+57.5%

1. 20.6% excluding acquisitions (at 2023 scope of consolidation)

2024- adjusted operating profit before and after other operating income (expense) by geographical region

2024 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	3,634.0	3,504.7	1,510.2	8,648.9
Cost of sales	(1,668.2)	(1,686.7)	(827.9)	(4,182.8)
Administrative and selling expenses, R&D costs	(1,128.8)	(1,153.6)	(401.3)	(2,683.7)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(34.6)	(83.0)	(13.5)	(131.1)
Adjusted operating profit before other operating income (expense)	871.6	747.4	294.5	1,913.5
as % of sales	24.0%	21.3%	19.5%	22.1%
Other operating income (expense)	(35.8)	(86.0)	(17.9)	(139.7) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	2.2	0.0	0.0	2.2
Adjusted operating profit	838.0	661.4	276.6	1,776.0
as % of sales	23.1%	18.9%	18.3%	20.5%

1. Restructuring (€76.8m) and other miscellaneous items (€62.9m)

2023 - adjusted operating profit before and after other operating income (expense) by geographical region

2023 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	3,652.2	3,294.9	1,469.8	8,416.9
Cost of sales	(1,676.0)	(1,549.4)	(792.6)	(4,018.0)
Administrative and selling expenses, R&D costs	(1,095.0)	(1,090.9)	(386.6)	(2,572.5)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(31.9)	(79.6)	(12.8)	(124.3)
Adjusted operating profit before other operating income (expense)	913.1	734.2	303.4	1,950.7
as % of sales	25.0%	22.3%	20.6%	23.2%
Other operating income (expense)	(114.4)	(94.2)	(26.2)	(234.8) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	54.3	0.0	0.0	54.3
Adjusted operating profit	853.0	640.0	277.2	1,770.2
as % of sales	23.4%	19.4%	18.9%	21.0%

1. Restructuring (€97.5m) and other miscellaneous items (€137.3m)

2024 First quarter - adjusted operating profit before and after other operating income (expense) by geographical region

Q1 2024 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	918.9	767.5	341.8	2,028.2
Cost of sales	(411.2)	(357.3)	(183.5)	(952.0)
Administrative and selling expenses, R&D costs	(286.3)	(276.9)	(93.3)	(656.5)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(5.4)	(18.8)	(2.0)	(26.2)
Adjusted operating profit before other operating income (expense)	226.8	152.1	67.0	445.9
as % of sales	24.7%	19.8%	19.6%	22.0%
Other operating income (expense)	(15.5)	(11.9)	(4.8)	(32.2) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	2.2	0.0	0.0	2.2
Adjusted operating profit	213.5	140.2	62.2	415.9
as % of sales	23.2%	18.3%	18.2%	20.5%

1. Restructuring (€12.7m) and other miscellaneous items (€19.5m)

2023 First quarter - adjusted operating profit before and after other operating income (expense) by geographical region

Q1 2023 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	978.2	829.2	342.2	2,149.6
Cost of sales	(436.6)	(389.6)	(183.9)	(1,010.1)
Administrative and selling expenses, R&D costs	(287.7)	(271.3)	(82.9)	(641.9)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(6.3)	(19.2)	(1.3)	(26.8)
Adjusted operating profit before other operating income (expense)	260.2	187.5	76.7	524.4
as % of sales	26.6%	22.6%	22.4%	24.4%
Other operating income (expense)	(16.6)	(27.8)	(2.8)	(47.2) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	0.0	0.0	0.0	0.0
Adjusted operating profit	243.6	159.7	73.9	477.2
as % of sales	24.9%	19.3%	21.6%	22.2%

1. Restructuring (€13.3m) and other miscellaneous items (€33.9m)

2024 Second quarter - adjusted operating profit before and after other operating income (expense) by geographical region

Q2 2024 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	898.4	891.8	391.9	2,182.1
Cost of sales	(399.5)	(433.6)	(211.0)	(1,044.1)
Administrative and selling expenses, R&D costs	(285.8)	(289.3)	(101.5)	(676.6)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(10.7)	(20.3)	(2.2)	(33.2)
Adjusted operating profit before other operating income (expense)	223.8	189.2	81.6	494.6
as % of sales	24.9%	21.2%	20.8%	22.7%
Other operating income (expense)	(4.8)	(30.6)	(2.0)	(37.4) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	0.0	0.0	0.0	0.0
Adjusted operating profit	219.0	158.6	79.6	457.2
as % of sales	24.4%	17.8%	20.3%	21.0%

1. Restructuring (€29.3m) and other miscellaneous items (€8.1m)

2023 Second quarter - adjusted operating profit before and after other operating income (expense) by geographical region

Q2 2023 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	936.0	837.4	371.8	2,145.2
Cost of sales	(427.9)	(391.0)	(198.4)	(1,017.3)
Administrative and selling expenses, R&D costs	(268.1)	(268.7)	(92.7)	(629.5)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(6.3)	(19.1)	(1.4)	(26.8)
Adjusted operating profit before other operating income (expense)	246.3	196.8	82.1	525.2
as % of sales	26.3%	23.5%	22.1%	24.5%
Other operating income (expense)	(30.8)	(19.6)	(6.1)	(56.5) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	8.8	0.0	0.0	8.8
Adjusted operating profit	224.3	177.2	76.0	477.5
as % of sales	24.0%	21.2%	20.4%	22.3%

1. Restructuring (€16.7m) and other miscellaneous items (€39.8m)

2024 Third quarter - adjusted operating profit before and after other operating income (expense) by geographical region

Q3 2024 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	787.0	868.9	362.8	2,018.7
Cost of sales	(368.6)	(417.9)	(200.0)	(986.5)
Administrative and selling expenses, R&D costs	(251.6)	(273.6)	(96.7)	(621.9)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(3.3)	(18.6)	(2.9)	(24.8)
Adjusted operating profit before other operating income (expense)	170.1	196.0	69.0	435.1
as % of sales	21.6%	22.6%	19.0%	21.6%
Other operating income (expense)	(13.0)	(16.5)	(2.6)	(32.1) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	0.0	0.0	0.0	0.0
Adjusted operating profit	157.1	179.5	66.4	403.0
as % of sales	20.0%	20.7%	18.3%	20.0%

1. Restructuring (€11.2m) and other miscellaneous items (€20.9m)

2023 Third quarter - adjusted operating profit before and after other operating income (expense) by geographical region

Q3 2023 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	843.3	831.0	338.2	2,012.5
Cost of sales	(397.8)	(394.7)	(184.3)	(976.8)
Administrative and selling expenses, R&D costs	(250.4)	(282.2)	(88.0)	(620.6)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(5.7)	(20.8)	(1.3)	(27.8)
Adjusted operating profit before other operating income (expense)	200.8	174.9	67.2	442.9
as % of sales	23.8%	21.0%	19.9%	22.0%
Other operating income (expense)	(14.9)	(13.4)	(5.3)	(33.6) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(0.5)	0.0	0.0	(0.5)
Adjusted operating profit	185.4	161.5	61.9	408.8
as % of sales	22.0%	19.4%	18.3%	20.3%

1. Restructuring (€9.7m) and other miscellaneous items (€23.9m)

2024 Fourth quarter - adjusted operating profit before and after other operating income (expense) by geographical region

Q4 2024 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	1,029.7	976.5	413.7	2,419.9
Cost of sales	(488.9)	(477.9)	(233.4)	(1,200.2)
Administrative and selling expenses, R&D costs	(305.1)	(313.8)	(109.8)	(728.7)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(15.2)	(25.3)	(6.4)	(46.9)
Adjusted operating profit before other operating income (expense)	250.9	210.1	76.9	537.9
as % of sales	24.4%	21.5%	18.6%	22.2%
Other operating income (expense)	(2.5)	(27.0)	(8.5)	(38.0) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	0.0	0.0	0.0	0.0
Adjusted operating profit	248.4	183.1	68.4	499.9
as % of sales	24.1%	18.8%	16.5%	20.7%

1. Restructuring (€23.6m) and other miscellaneous items (€14.4m)

2023 Fourth quarter - adjusted operating profit before and after other operating income (expense) by geographical region

Q4 2023 (in € millions)	Europe	North and Central America	Rest of the World	Total
Net sales	894.7	797.3	417.6	2,109.6
Cost of sales	(413.7)	(374.1)	(226.0)	(1,013.8)
Administrative and selling expenses, R&D costs	(288.8)	(268.7)	(123.0)	(680.5)
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	(13.6)	(20.5)	(8.8)	(42.9)
Adjusted operating profit before other operating income (expense)	205.8	175.0	77.4	458.2
as % of sales	23.0%	21.9%	18.5%	21.7%
Other operating income (expense)	(52.1)	(33.4)	(12.0)	(97.5) ⁽¹⁾
Reversal of (i) amortization & depreciation of revaluation of assets at the time of acquisitions and other P&L impacts relating to acquisitions, (ii) impacts related to disengagement from Russia (impairment of assets and effective disposal) and, (iii) where applicable, impairment of goodwill	46.0	0.0	0.0	46.0
Adjusted operating profit	199.7	141.6	65.4	406.7
as % of sales	22.3%	17.8%	15.7%	19.3%

1. Restructuring (€57.8m) and other miscellaneous items (€39.7m)

2024 - reconciliation of cash flow from operations with profit

In € millions	2023	2024
Profit	1,148.5	1,168.9
Depreciation, amortization and impairment	373.9	384.9
Changes in other non-current assets and liabilities and long-term deferred taxes	15.2	35.5
Unrealized exchange (gains)/losses	4.8	0.1
(Gains)/losses on sales of assets, net	44.1	1.4
Other adjustments	14.0	7.8
Cash flow from operations	1,600.5	1,598.6

2024 - reconciliation of free cash flow and normalized free cash flow with cash flow from operations

In € millions	2023	2024	% change
Cash flow from operations	1,600.5	1,598.6	-0.1%
<i>as % of sales</i>	<i>19.0%</i>	<i>18.5%</i>	
Decrease (Increase) in working capital requirement	235.9	(75.3)	
Net cash provided from operating activities	1,836.4	1,523.3	-17.0%
<i>as % of sales</i>	<i>21.8%</i>	<i>17.6%</i>	
Capital expenditure (including capitalized development costs)	(253.3)	(239.6)	
Net proceeds from sales of fixed and financial assets	1.7	6.8	
Free cash flow	1,584.8	1,290.5	-18.6%
<i>as % of sales</i>	<i>18.8%</i>	<i>14.9%</i>	
Increase (Decrease) in working capital requirement	(235.9)	75.3	
(Increase) Decrease in normalized working capital requirement	(22.2)	(8.8)	
Normalized free cash flow	1,326.7	1,357.0	+2.3%
<i>as % of sales</i>	<i>15.8%</i>	<i>15.7%</i>	

Scope of consolidation (1/2)

2023	Q1	H1	9M	FY
Full consolidated method				
GEIGER	3 months	6 months	9 months	12 months
EMOS	3 months	6 months	9 months	12 months
USYSTEMS	3 months	6 months	9 months	12 months
VOLTADIS	Balance sheet only	6 months	9 months	12 months
A. & H. MEYER	Balance sheet only	6 months	9 months	12 months
POWER CONTROL	Balance sheet only	Balance sheet only	9 months	12 months
ENCELIUM	Balance sheet only	6 months	9 months	12 months
CLAMPER	Balance sheet only	Balance sheet only	Balance sheet only	11 months
TEKNICA			Balance sheet only	4 months
MSS				Balance sheet only

Scope of consolidation (2/2)

2024	Q1	H1	9M	FY
Full consolidated method				
VOLTADIS	3 months	6 months	9 months	12 months
A. & H. MEYER	3 months	6 months	9 months	12 months
POWER CONTROL	3 months	6 months	9 months	12 months
ENCELIUM	3 months	6 months	9 months	12 months
CLAMPER	3 months	6 months	9 months	12 months
TEKNICA	3 months	6 months	9 months	12 months
MSS	Balance sheet only	6 months	9 months	12 months
ZPE SYSTEMS	Balance sheet only	Balance sheet only	Balance sheet only	12 months
ENOVATION		Balance sheet only	Balance sheet only	7 months
NETRACK		Balance sheet only	Balance sheet only	9 months
DAVENHAM		Balance sheet only	Balance sheet only	6 months
VASS		Balance sheet only	Balance sheet only	7 months
UPSISTEMAS			Balance sheet only	Balance sheet only
APP				Balance sheet only
POWER BUS WAY				Balance sheet only
CIRCUL'R				Balance sheet only

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