



1Q26



Earnings Call

April 23rd, 2026

Forward Looking Statements



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Speakers



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01

1Q26 Performance Overview

1Q26 Results | A Quarter Defined by Discipline



Operational Resilience

- Top-line growth
- Double-digit EBIT & EBITDA expansion
- Margin improvement
- Strong cash generation
- Leverage reduction

Navigating Challenges

- Resilience against currency volatility
- Regional pressures (Argentina)
- Uncertain global environment



Discipline in our Results



Discipline to operate



Discipline to allocate



Discipline to grow

Profitable Growth & Core Expansion

- Better execution & commercial focus.
- Improved product mix & disciplined channel management.
- Focus on cash protection & efficiency.
- Driving core business as a strong cash generator.

Water Innovation & Market Disruption

- bebbia platform scaling with strong economics.
- Structural demand for RSA solutions in Mexico.
- Strategic maturity in water treatment & recycling platforms.

Business Priorities

Tech & Talent Enablement

- Embedding AI-driven processes across the organization.
- Digital tools optimizing planning & field execution.
- Operational improvements without added complexity.

Sustainable Impact & Efficiency

- 5th consecutive year in S&P Global Sustainability Yearbook.
- ESR distinction for 16th year in Mexico.
- Achieved the CDP Climate Change "A" rating.
- ESG principles embedded in resource allocation & efficiency.



- Profitability is improving faster than revenue.
- Leverage is coming down.
- Our business is becoming more balanced.

A man with grey hair, wearing safety glasses and a blue shirt, is leaning forward in a factory setting, looking at a piece of machinery. The background is blurred, showing industrial equipment.

02

Financial & Strategy Highlights

P&L | Financial Highlights



Figures in million MXN

	1Q26	1Q25	Δ %/pb
Sales	2,661	2,636	1%
COGS	1,523	1,519	0%
Gross Profit	1,138	1,117	2%
<i>Margin</i>	43%	42%	40 bp
SG&A	977	978	(0%)
Operating Income	160	139	16%
<i>Margin</i>	6%	5%	70 bp
Net Financing Cost	(31)	116	NA
Taxes	79	(1)	NA
Net Result	113	24	NA
<i>Margin</i>	4%	1%	330 bp
EBITDA	332	301	10%
<i>Margin</i>	12%	11%	110 bp

Excluding FX effects across all geographies other than Argentina, sales would have grown 4.1%

1Q26 Performance ex. Argentina

- Sales Growth: +3.8%
- EBITDA Growth: +20.4%
- EBITDA Margin: 17.1%



Sales | Per Country



1Q26

Δ Sales	3%
EBITDA Margin	19%

- Commercial strategy improved inventory levels.
- Services maintained double-digit growth, driven by bebbia and RSA.
- EBITDA expanded supported by strict expense control.



1Q26

Δ Sales	(13%)
EBITDA Margin	(14%)

- Strong competitive dynamics limited pricing power.
- Construction sector slow recovery pressured demand.
- EBITDA remained negative.



1Q26

Δ Sales	(7%)
EBITDA Margin	(0%)

- Industrial and chemical verticals supported performance across customer base.
- Pricing discipline and productivity.
- EBITDA reached breakeven, confirming the turnaround initiated in 2025.



1Q26

Δ Sales	16%
EBITDA Margin	22%

- Peru:** Strong summer demand and portfolio expansion drove growth.
- Central America:** Regional expansion drove double-digit growth.
- Brazil:** Water treatment plants secured new contracts, strengthening the project pipeline.

Sales | Products & Services

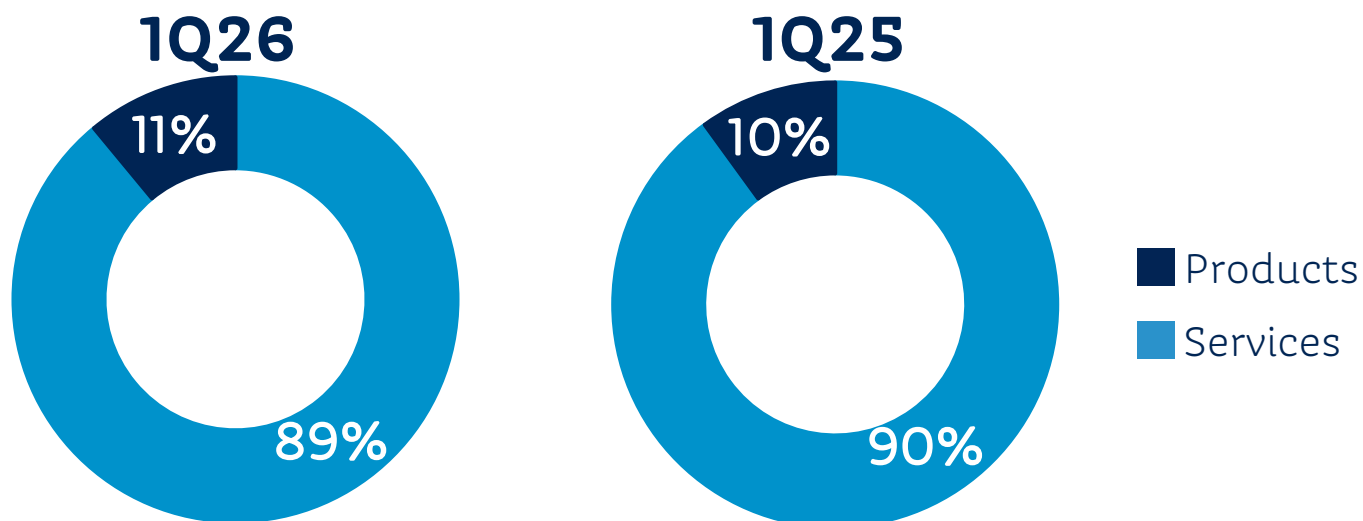


Figures in million MXN

+180,000 bebbia units

Products recovering with mixed performance and improved margins across key markets

Services gaining scale with improved unit economics in bebbia



		1Q26	1Q25	%Δ
Products	Sales	2,371	2,380	(0%)
	EBITDA	356	314	13%
	Margin %	15%	13%	180 bps
Services	Sales	289	255	13%
	EBITDA	(24)	(13)	NM
	Margin %	(8%)	(5%)	310 bps
Total	Sales	2,661	2,636	1%
	EBITDA	332	301	10%
	Margin %	12%	11%	110 bps

Cash Position

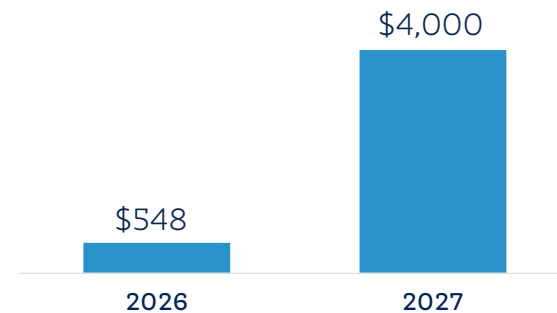


Figures in million MXN

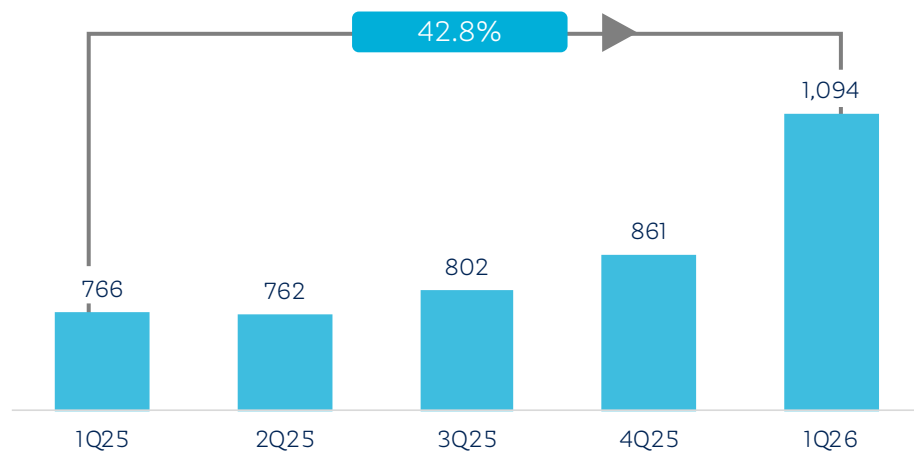
Current Leverage

Balance Sheet	1Q26	1Q25	Δ %
Cash & Cash equivalents	1,094	766	43%
Total Financial Debt*	4,548	4,635	(2%)
Net Financial Debt*	3,455	3,869	(11%)
Net Financial Debt* / EBITDA	2.6x	3.7x	(31%)

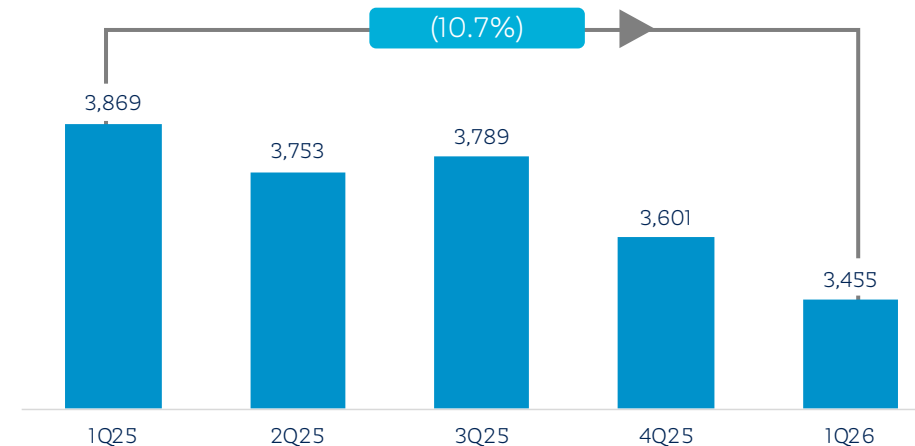
Debt Maturity Profile



CASH



NET FINANCIAL DEBT*



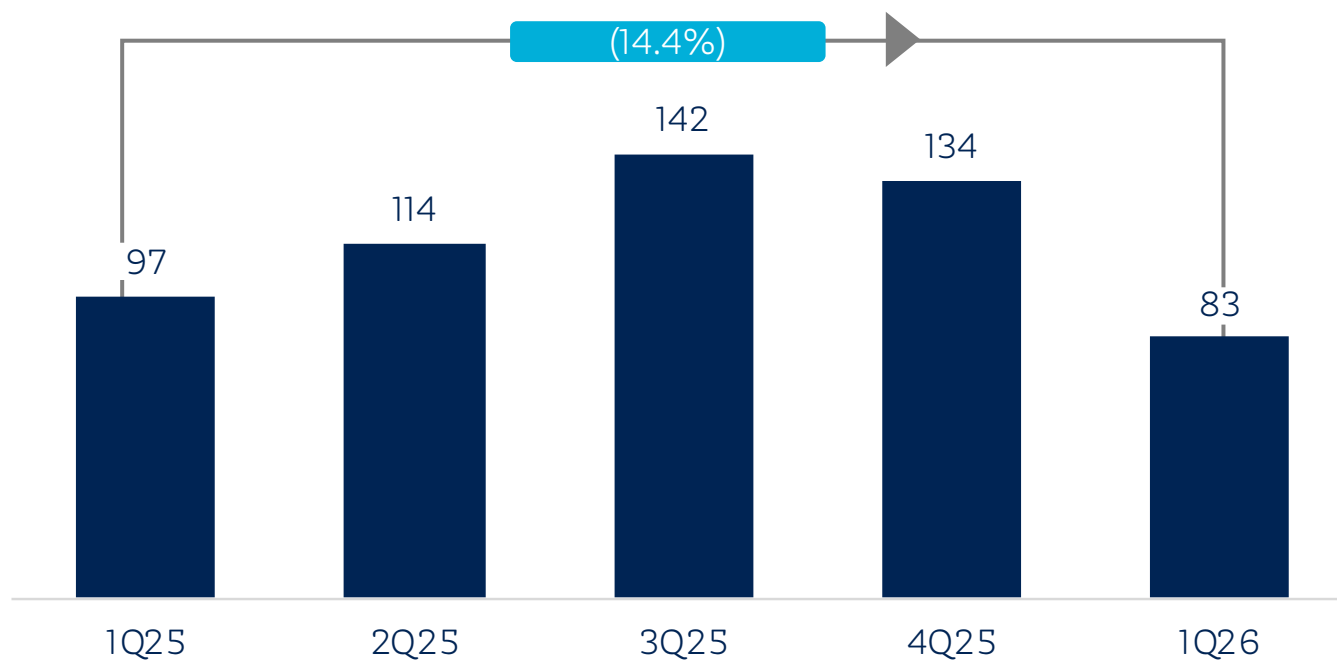
*Financial Debt excludes leases
2025 figures are unaudited

Discipline in Capital Allocation



Figures in million MXN

CAPEX



- **CapEx** was **3.1% of sales** for 1Q26.
- Focused on cash flow discipline and service growth.
- +94% of total investment allocated to Mexico, primarily bebbia and water treatment plants.
- Maintenance CapEx for core Products remained minimal.

Key Takeaways



Structural Improvement

This quarter's gains are structural.

- EBITDA Margin +110 bps YoY — third consecutive quarter of expansion
- Operating Cash Flow +51% YoY
- Working capital ↓33 days

Challenges

We are clear-eyed about what remains.

- Argentina & Mexico macro
- Leverage above target
- Global Trade & currency volatility

Targeted Performance

Moving precisely toward key financial and strategic objectives.

- Services EBITDA moving to breakeven
- Balance sheet ready to support growth
- ROIC above cost of capital

Thank you!

**Rotoplas**
mejor agua



You can submit a question by pressing the “Q&A” button.

Please include:

*Name

*Fund or Company