

**LFL¹ REVENUE UP +1.8% IN Q3 2026 AND +1.1% IN 9M 2026
GROSS MARGIN RATE INCREASE (+40 bps)
OUTLOOK CONFIRMED**

**MERGER CONTROL CLEARANCE FROM THE EUROPEAN COMMISSION OBTAINED
TAKEOVER BID TO CLOSE ON NOVEMBER 9, 2026**

- **9M 2026 revenue of €6,966 million**, up +1.1% LFL¹ compared with 9M 2025²
- **9M online sales up +5.3%**, with Click & Collect accounting for close to 50% of online sales
- **Gross margin rate up 40 bps** compared with 9M 2025²
- **2026 outlook confirmed**
- **Takeover bid by EP Group:**
 - **Merger control clearance from the European Commission obtained**
 - **Offer period closing on November 9, 2026**
 - **If successful, the Offer should be reopened for at least ten trading days**

Enrique Martinez, Chief Executive Officer of Fnac Darty, declared: "Our group is performing very strongly in a complex context, as illustrated by the events of the last few days in France. I would like to thank our teams who have shown exemplary professionalism and commitment in the stores that have been affected by theft and violence. We are determined to quickly restore these stores to be able to welcome our customers again in the best conditions. We are pleased that EP Group's public takeover bid has obtained the required clearance from the European Commission and can now move forward to completion. Our shareholders have until November 9 to tender their shares."

KEY FIGURES AT THE END OF SEPTEMBER 2026

(€ million)	Q3 2026			9M 2026		
	2025 reported	2025 restated ²	2026	2025 reported	2025 restated ²	2026
Revenue	2,488.3	2,460.7	2,508.6	6,968.1	6,884.0	6,965.7
Change vs 2025 restated			+1.9%			+1.2%
LFL change ¹			+1.8%			+1.1%

In Q3 2026, Group revenue amounted to €2,509 million, up +1.8% on a like-for-like basis¹ compared with Q3 2025². France was almost stable at -0.4% LFL¹. The Rest of Europe posted strong growth (+5.0% LFL¹).

At the end of September 2026, revenue was €6,966 million, up +1.1% on a like-for-like basis¹ compared with 9M 2025².

Gross margin rate has increased by 40 bps compared with 9M 2025 restated², primarily due to the growing contribution of services businesses and a favorable product mix.

¹ Like-for-like basis – LFL: excludes currency effects, changes in scope, store openings and closures.

² Restated data: include the IFRS 5 reclassification of Nature & Découvertes as shown in the IFRS 2025 consolidated financial statements.

FNAC DARTY



CHANGES BY DISTRIBUTION CHANNEL

At the end of September 2026, in-store sales were stable. Conversely, online sales increased (+5.3% compared with 9M 2025²) and represented more than 21% of the Group's total sales, driven in particular by the Group's marketplaces (direct and reverse). Omnichannel sales (Click & Collect) increased compared with 9M 2025² and represented close to 50% of the Group's online revenue. These results confirm, once again, the relevance of the omnichannel strategy adopted by Fnac Darty.

CHANGE BY PRODUCT CATEGORY AT THE END OF SEPTEMBER

Domestic appliances posted solid growth, driven by small domestic appliances, particularly floor care, coffee and seasonal products. Large domestic appliances also grew, benefiting from the good performance of air conditioning and refrigeration products in favorable weather conditions.

Consumer electronics recorded slight growth, with contrasting trends across categories. Hardware sales continued to benefit from the end of support for Windows 10 and the ongoing replacement cycle. Telephony sales grew, driven by a good third quarter, while sound, photo and television were slightly down.

Diversification posted mid-single-digit growth, driven in particular by double-digit growth in toys & games.

Services continued to grow, supported by strong momentum in subscription-based offers.

Lastly, **editorial products** declined, penalized by an unfavorable comparison base in gaming following the successful launch of the Switch 2 in 2025. Books were down in a market with few notable new releases, while audio remained very dynamic thanks to vinyl.

CHANGE BY GEOGRAPHY AT THE END OF SEPTEMBER

France posted a -0.6% decline in LFL¹ revenue compared with 9M 2025². Although weather conditions supported certain categories, activity remained affected by a subdued consumer environment.

Rest of Europe posted an increase in LFL¹ revenue of +3.5% compared with 9M 2025²:

- Italy posted LFL¹ growth of +2.5% across all distribution channels.
- Belgium-Luxembourg recorded LFL¹ growth of +5.2%, driven by strong consumption momentum.
- Portugal posted LFL¹ growth of +8.0%, driven by strong momentum across both brands and all distribution channels. The acquisition of 11 Staples stores will strengthen the brand's territorial footprint in 2027.
- Spain posted LFL¹ growth of +4.4%, supported by positive momentum across all categories, both in stores and online. Renovated stores performed well.
- Switzerland was down -1.1% LFL¹, mainly impacted by the decline in the book and hardware markets.

UNIEURO

The integration of Unieuro is progressing in line with the announced timetable. The French and Italian teams are working together to deploy the strategic initiatives of the Beyond everyday plan. Operating performance in Italy is satisfactory. The Group confirms its target of at least €20 million in synergies by the end of 2026.

REPAIR & BEYOND

For the ninth consecutive year, Fnac Darty is presenting the results of its after-sales services barometer, which outlines the major durability trends observed in the field. Reported at the beginning of October, it provides objective and independent insight into product reliability and repairability. This new edition notably highlights the solutions available in the event of breakdowns and the expertise of the entire repair sector in dealing with increasingly complex products.

BEYOND DIGITIZED OMNICHANNEL

Opened on October 6, the new Fnac store in Toulouse illustrates the evolution of the brand's model: smoother customer journeys, enhanced services, modular spaces and personalized support. Designed to adapt to key trading periods and host new events and experiences, it brings together all Fnac product categories, complemented by a Darty corner dedicated to small domestic appliances, a WeFix area for smartphone and tablet repairs, and a Lego shop-in-shop. This new concept reflects the ambitions of Beyond everyday: simplifying the customer experience, strengthening the complementarity between stores, e-commerce, services and repair, and enhancing proximity and expertise.

FNAC DARTY



BEYOND RETAIL

Retailink by Fnac Darty continued to roll out its XXL DOOH offering with a new display at Fnac La Défense, inaugurated this summer, bringing its network of large-format displays in Paris and Nice to six. This expansion is in line with the Group's strategy to digitize its points of sale and reinforces the ambition of the Group's retail media agency to offer the most comprehensive premium DOOH Retail Media solution in the French market.

EP GROUP'S TAKEOVER BID FOR FNAC DARTY

Fnac Darty and EP FR HOLDCo, the vehicle controlled by EP Group and established for the purposes of the proposed public tender Offer for the outstanding shares and OCEANes of Fnac Darty announced on October 20, 2026 that they had received the merger control clearance from the European Commission for the planned acquisition of Fnac Darty.

As a result of the receipt of this decision, which constitutes the last expected approval of the transaction, the French Financial Markets Authority (Autorité des marchés financiers, "AMF") announced on October 20, 2026 that the Offer for Fnac Darty securities will close on November 9, 2026.

Fnac Darty shareholders and OCEANE holders therefore have until November 9, 2026 to tender their securities to the EP FR HOLDCo Offer.

The Offer price is €35 per share, following the payment on June 5, 2026 of a dividend of €1 per share in respect of the 2025 financial year, and €81.16¹ per OCEANE.

The AMF is expected to publish the Offer results notice in the days following November 9, 2026.

The settlement will take place on November 12, 2026.

If successful, the Offer will be reopened for at least ten trading days.

Documentation relating to the Offer is available on Fnac Darty's website in the section dedicated to the Offer (www.fnacdarty.com/le-groupe/investisseurs/projet-doffre-publique-dachat-de-ep-group/) and on the AMF website (www.amf-france.org).

OUTLOOK

The Group confirms its expectation of an increase in its **2026 current operating margin rate** and **free cash flow from operations**.

Fnac Darty is continuing to implement the strategic roadmap of the Beyond everyday plan, presented on June 11, 2025, and **confirms the objectives communicated for 2030**.

¹ Calculated on the basis of an interest accrual period from 23 March 2026 to 12 November 2026, being the settlement date of the initial acceptance period of the Offer.

Q3 2026 REVENUE

Enrique Martinez, Chief Executive Officer and **Jean-Brieuc Le Tinier, Group Chief Financial Officer**, will host a virtual presentation in French, with simultaneous interpretation into English.

Wednesday, October 21, 2026, at 6:00 p.m. (Central European Time)
5:00 p.m. (UK) - 12:00 p.m. (East Coast USA)

The presentation will be streamed live at this [link](#).

To join the conference call to listen by phone and ask questions:

France: +33 1 70 91 87 04

UK: +44 1 212 818 004

USA: +1 718 705 8796

You can listen to a recording of the presentation at any time, in either French or English, via the website www.fnacdarty.com.

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FNAC DARTY

APPENDIX

The following tables contain individually rounded data. The arithmetical calculations based on rounded data may present some differences with the aggregates or subtotals reported.

REVENUE

in €m	Q3 2025 reported	Q3 2025 restated ¹	Q3 2026	Change compared with Q3 2025 restated	
				Reported	LFL ²
France	1,469.4	1,441.9	1,439.6	(0.2)%	(0.4)%
Rest of Europe	1,018.9	1,018.9	1,069.0	+4.9%	+5.0%
o/w Italy	617.0	617.0	643.0	+4.2%	+5.0%
o/w Belgium	159.8	159.8	166.4	+4.1%	+4.1%
o/w Portugal	130.5	130.5	135.7	+4.0%	+6.3%
o/w Spain	63.8	63.8	74.5	+16.8%	+9.6%
o/w Switzerland	47.8	47.8	49.5	+3.6%	+0.3%
Group	2,488.3	2,460.7	2,508.6	+1.9%	+1.8%

in €m	9M 2025 reported	9M 2025 restated ¹	9M 2026	Change compared with 9M 2025 restated	
				Reported	LFL ²
France	4,119.9	4,035.8	4,018.5	(0.4)%	(0.6)%
Rest of Europe	2,848.1	2,848.1	2,947.2	+3.5%	+3.5%
o/w Italy	1,737.4	1,737.4	1,777.0	+2.3%	+2.5%
o/w Belgium	439.5	439.5	462.1	+5.1%	+5.2%
o/w Portugal	344.6	344.6	364.1	+5.7%	+8.0%
o/w Spain	192.1	192.1	207.4	+8.0%	+4.4%
o/w Switzerland	134.6	134.6	136.6	+1.5%	(1.1)%
Group	6,968.1	6,884.0	6,965.7	+1.2%	+1.1%

2025 RESTATED ¹	Q1	Q2	H1	Q3	9M	Q4	H2	FY
in €m								
France	1,343.7	1,250.2	2,593.9	1,441.9	4,035.8	2,033.1	3,474.9	6,068.9
Rest of Europe	942.1	887.2	1,829.3	1,018.9	2,848.1	1,412.8	2,431.7	4,260.9
o/w Italy	573.2	547.2	1,120.4	617.0	1,737.4	846.4	1,463.3	2,583.7
o/w Belgium	153.0	126.7	279.7	159.8	439.5	191.7	351.5	631.2
o/w Portugal	104.4	109.7	214.1	130.5	344.6	194.4	324.9	539.0
o/w Spain	67.0	61.2	128.3	63.8	192.1	103.5	167.3	295.6
o/w Switzerland	44.4	42.4	86.8	47.8	134.6	76.8	124.6	211.4
Group	2,285.8	2,137.4	4,423.2	2,460.7	6,884.0	3,445.9	5,906.6	10,329.8

¹ Restated data: include the IFRS 5 reclassification of Nature & Découvertes as shown in the IFRS 2025 consolidated financial statements.

² Like-for-like basis – LFL: excludes the effect of changes in foreign exchange rates, changes in scope, and store openings and closures.

STORE NETWORK

	December 31, 2025			September 30, 2026		
	Integrated	Franchises	Total	Integrated	Franchises	Total
France¹	395	401	796	398	380	778
Rest of Europe	439	249	688	434	241	675
<i>Italy</i>	269	242	511	264	234	498
<i>Belgium</i>	84	-	84	84	-	84
<i>Portugal</i>	45	4	49	46	4	50
<i>Spain</i>	33	3	36	31	3	34
<i>Switzerland</i>	8	-	8	9	-	9
Total Group	834	650	1,484	832	621	1,453

¹ Including 15 stores abroad (3 in Qatar, 6 in Tunisia, 2 in Senegal, 2 in Ivory Coast, 1 in Congo and 1 in Cameroon), 14 stores in the French overseas territories, as well as Nature & Découvertes subsidiaries managed from France.

DEFINITIONS OF ALTERNATIVE PERFORMANCE INDICATORS

Revenue	The Group's "real" revenue (or income from ordinary activities) corresponds to its reported revenue. The Group uses the notions of change in revenue detailed below.
Current operating income	Fnac Darty uses current operating income as the main management balance. This is defined as the difference between the total operating income and the "Other non-current operating income and expense." Current operating income is an intermediate line item intended to facilitate the understanding of the entity's operating performance that can be used as a way to estimate recurring performance. This indicator is presented in a manner that is consistent and stable over the long term in order to ensure the continuity and relevance of financial information.
Change in revenue at a constant exchange rate	Change in revenue at a constant exchange rate means that the impact of changes in exchange rates has been excluded. The exchange rate impact is eliminated by recalculating sales for period N-1 using the exchange rates used for period N.
Change in revenue on a like-for-like basis	Change in revenue on a like-for-like basis means that the impact of changes in the scope of consolidation is corrected so as to exclude the modifications (acquisition, disposal of subsidiary). Revenue of subsidiaries acquired or sold since January 1 of period N-1 are, therefore, excluded when calculating the change (in the event of a significant variation at Group level).
Change in revenue on a same-store basis	The change in revenue on a same-store basis means that the impact of directly owned store openings and closures is excluded. Revenue of stores opened or closed since January 1 of period N-1 is excluded from calculations of the change.