



9M 2026 REVENUE & BUSINESS ACTIVITY

21 October 2026

FNAC DARTY

9M 2026 HIGHLIGHTS

GROUP REVENUE

€ 6,966m

+ 1.1 % LFL

vs 9M 2025 restated¹

GROSS MARGIN

28.7%

+ 40 BPS

vs 9M 2025 restated¹

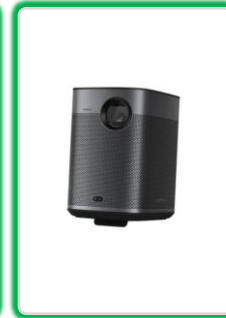


2026 guidance confirmed

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

PERFORMANCE BY CATEGORY

Domestic Appliances



Technical Products



Services



Editorial Products



Diversification

GROUP REVENUE BY GEOGRAPHY

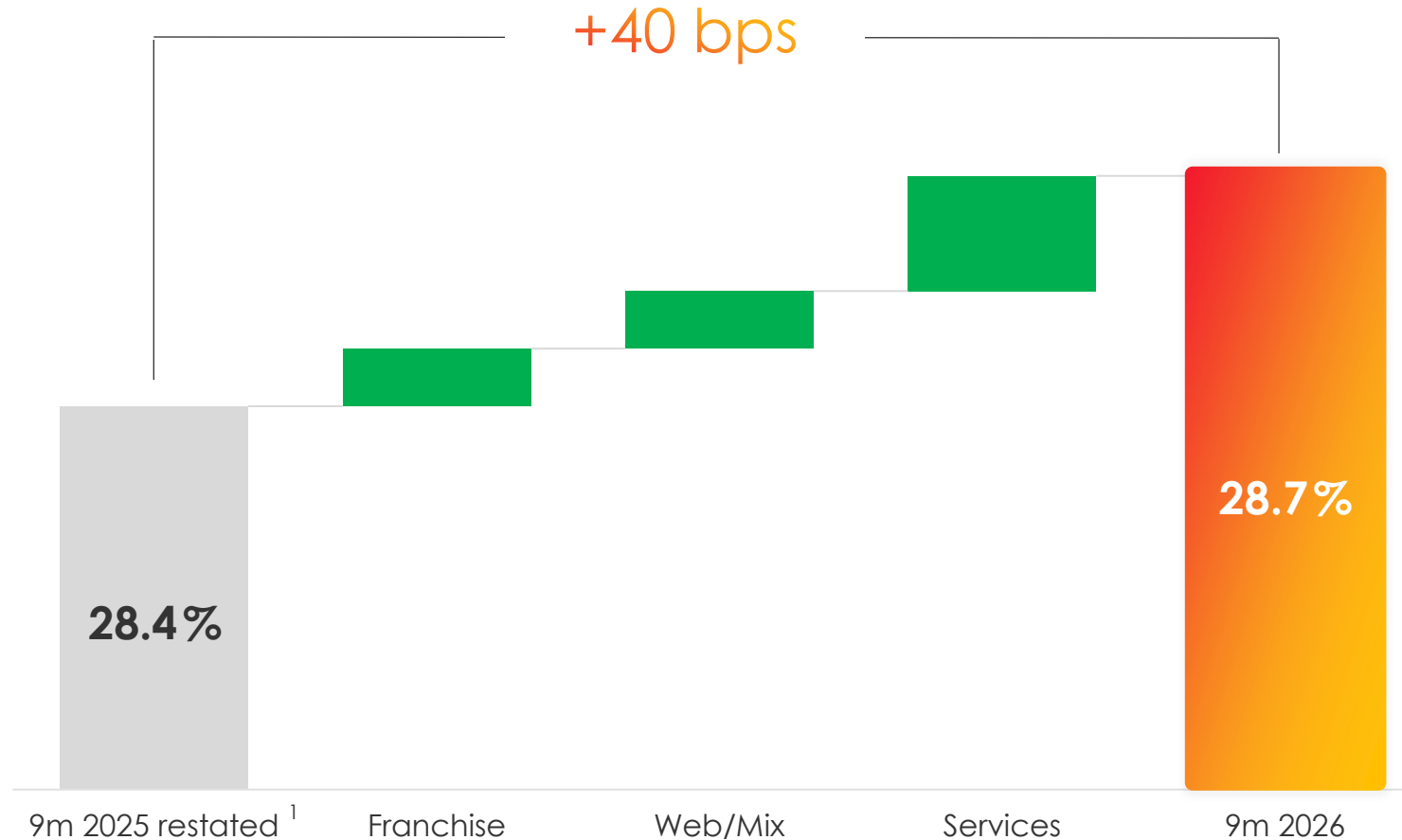
	In €m	9M 2026	As a % of total Group revenue	% LFL ¹ Change	
	France	4,018.5	58 %	(0.6) %	🚩 France Weather conditions supported some product category, but business activity remained impacted by a weak consumer environment
	Rest of Europe	2,947.2	42 %	+3.5 %	🚩 Rest of Europe strong performance
	<i>Italy</i>	<i>1,777.0</i>	<i>25 %</i>	<i>+2.5 %</i>	• Italy: growth across all channels
	<i>Belgium</i>	<i>462.1</i>	<i>7 %</i>	<i>+5.2 %</i>	• Belgium: pushed by good consumer demand
	<i>Portugal</i>	<i>364.1</i>	<i>5 %</i>	<i>+8.0 %</i>	• Portugal: Fnac & Darty dynamism, both in-store and online
	<i>Spain</i>	<i>207.4</i>	<i>3 %</i>	<i>+4.4 %</i>	• Spain: Positive momentum across all categories, both in stores and online
	<i>Switzerland</i>	<i>136.6</i>	<i>2 %</i>	<i>(1.1) %</i>	• Switzerland: Mainly impacted by the decline in the book market and computer sales
	TOTAL GROUP	6,965.7	100 %	+1.1 %	

¹ Like-for-like: excludes exchange rate fluctuations, change in scope and opening and closing of directly owned stores. Includes the IFRS 5 reclassification of Nature & Découvertes as shown in the IFRS 2025 consolidated financial statements.

9M 2026 **GROSS MARGIN**

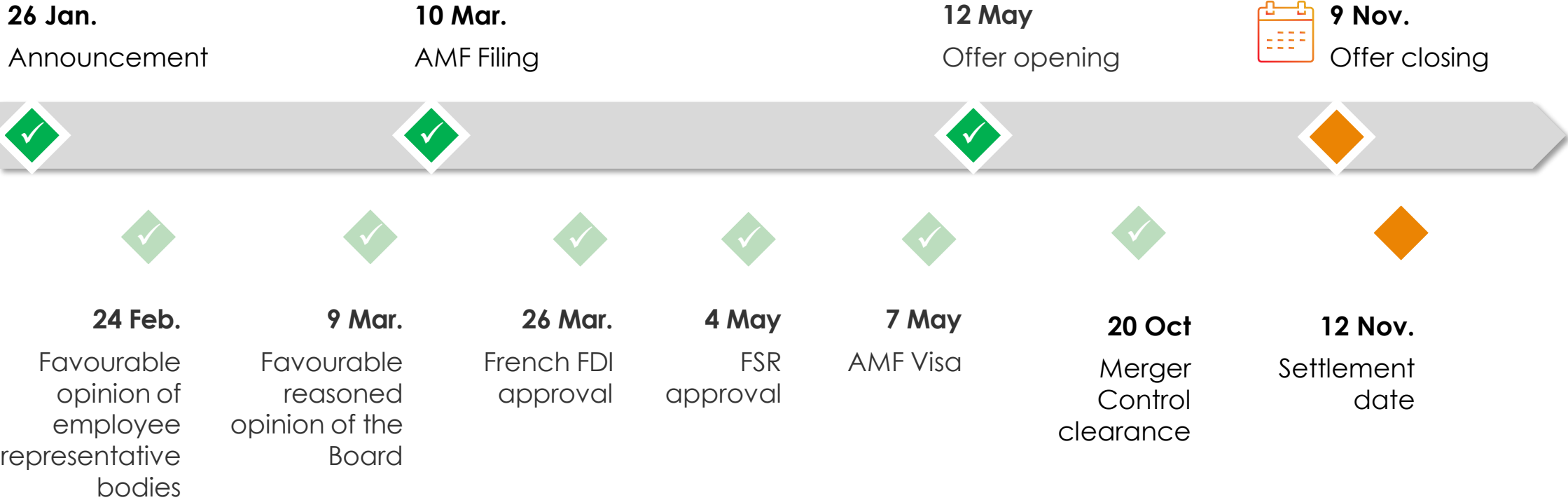
Gross margin increasing **+40 bps**¹ supported by a favorable mix and the expansion of service activities

As a % of sales



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

EP GROUP TENDER OFFER: **MERGER CONTROL CLEARANCE**



Remaining offer condition:
Legal threshold of more than 50 % of the share capital or voting rights at the end of the offer period

OUTLOOK



Offer closing date
9 November 2026



2026 Guidance confirmed
Increase in Current Operating Margin and
Free Cash Flow



2030 Objectives confirmed



Q&A SESSION

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