

# EXECUTIVE SUMMARY

First quarter of 2026



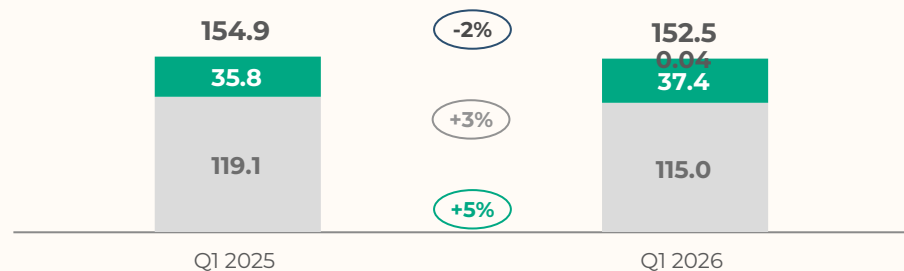
## Main figures €Mn

<b>Op. Revenue</b>	<b>EBITDA</b>	<b>EBIT</b>
<b>152.5 (-2%)</b>	<b>20.3 (-33%)</b>	<b>12.1 (-47%)</b>
<b>Net profit</b>	<b>Capex</b>	<b>Net debt</b>
<b>9.4 (-48%)</b>	<b>7.7 (-7%)</b>	<b>14.9</b>

**2026 operating revenue growth rate:**  
Increase by a low- to mid-single-digit percentage vs 2025

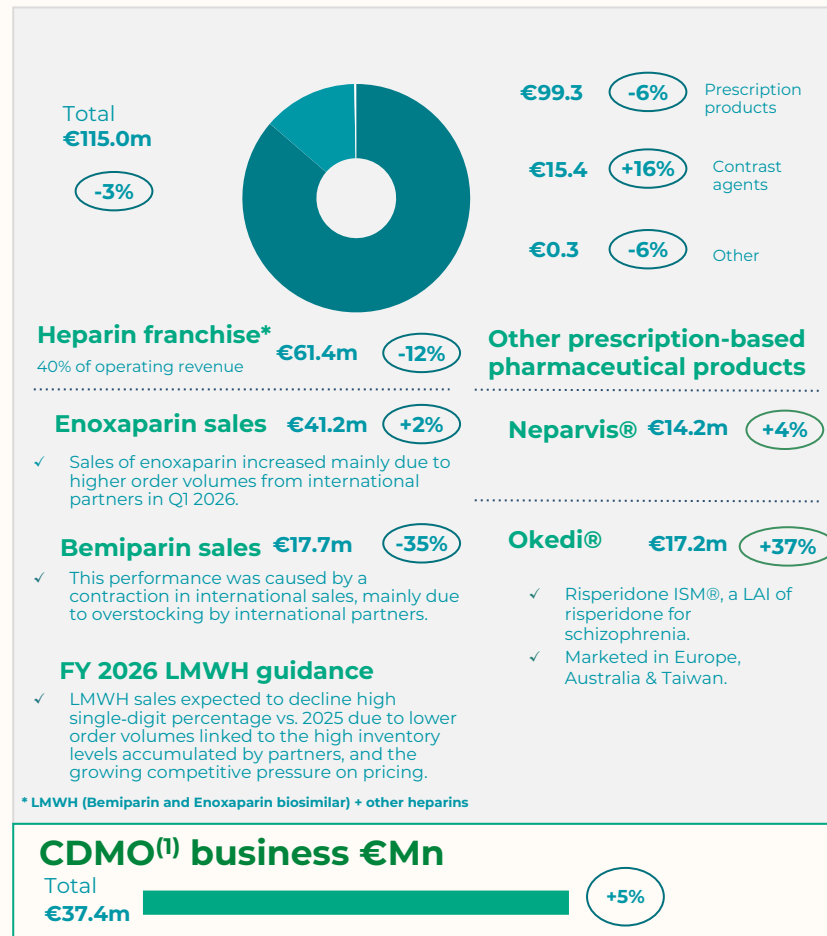
✓ On April 2026, ROVI announced the execution of the Asset Purchase Agreement for the acquisition of a pharmaceutical manufacturing facility located in Phoenix, Arizona (USA)

## Operating revenue €Mn



■ Specialty pharmaceutical business 
 ■ CDMO business 
 ■ Other operating revenue(\*)

## Specialty pharma business €Mn

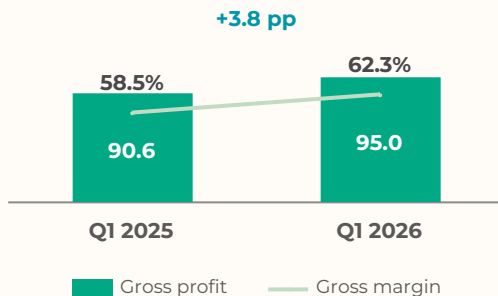


(\*) "Other operating income" includes service activities that are not material to the Group.

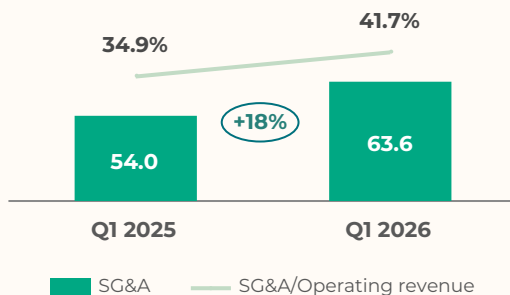
<sup>(1)</sup> Contract Development and Manufacturing Organisation

To obtain further information on the alternative performance measures (APMs) and non-IFRS financial indicators used, including the definition thereof and a reconciliation between the applicable management indicators and the financial information set out in the consolidated financial statements prepared under IFRS, please consult the information included on this subject on page 1 and Appendix 2 (pages 33-37) of the press release on the financial results for the first quarter of 2026. Said document is available on ROVI's website and may be accessed on the following link <https://www.rovi.es/en/shareholders-investors/financial-business-information>

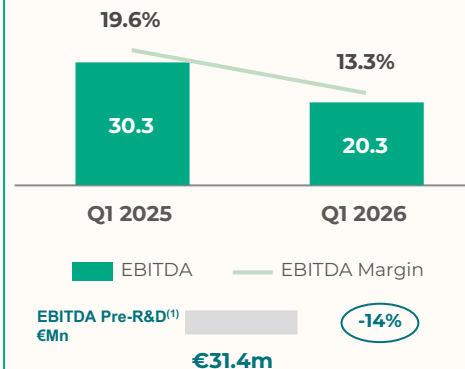
## Gross profit €Mn



## SG&A expenses €Mn



## EBITDA €Mn



## R&D expenses €Mn €11.2

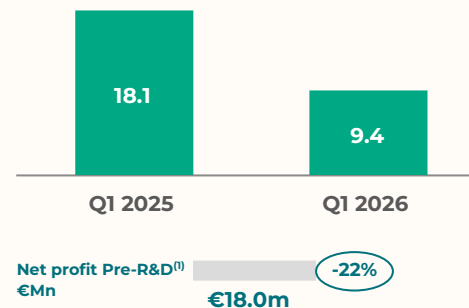
+79%

Product	Potential Indication	Current Situation	Key Milestones
Risperidone ISM®, monthly	<b>Schizophrenia</b>	Approved	Marketed in Europe, and in Australia & Taiwan
Letrozole ISM®, annual	<b>Breast Cancer</b>	Clinical development on hold	Phase I: Superior oestrogen suppression vs Femara®
Letrozole SIE <sup>(1)</sup> , quarterly	<b>Breast Cancer</b>	Completion of phase I	Phase I: positive readout confirms superior estrogen suppression vs Femara® and allows progression to phase III clinical trial
Risperidone ISM®, quarterly	<b>Schizophrenia</b>	Completion of phase I	Phase I: positive readout allows progression to phase III clinical trial

Concentrated on improving posology for already approved compounds, which benefits risk / reward profile  
Multiple FDA / GMP approved facilities to support the platform

(1) Superior Inhibition of Estrogen  
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## Net profit €Mn



(1) Calculated excluding R&D expenses in Q1 2026 and Q1 2025

## Closing remarks

- ✓ Strong momentum in CDMO business: consistent and focused execution
- ✓ Value creation from the acquisition of an injectable drug product manufacturing site in Phoenix, Arizona (USA)
- ✓ Vertical integration of the heparin division to enhance cost efficiency and improve competitiveness
- ✓ Sustained growth of the specialty pharmaceutical business, driven by Okedi®
- ✓ Strong R&D investment, with two clinical trials ongoing