

EXECUTIVE SUMMARY

First quarter of 2026



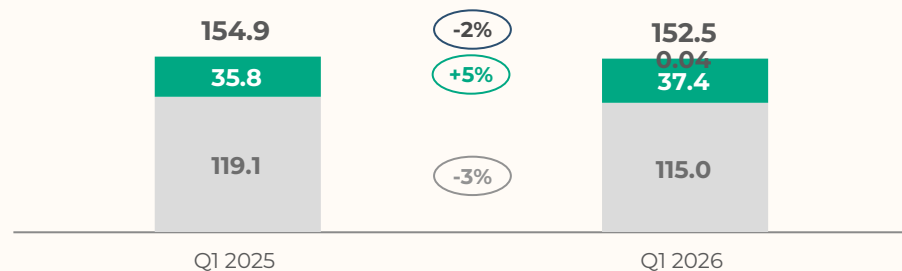
Main figures €Mn

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

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

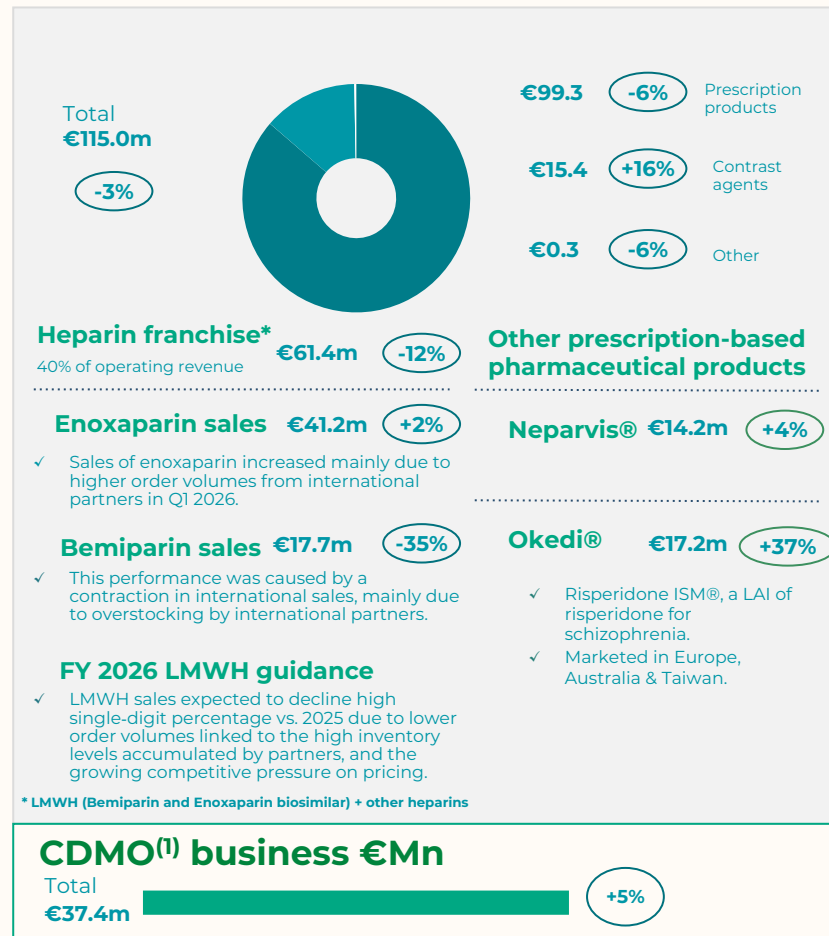
✓ On April 2026, ROVI announced the execution of the Asset Purchase Agreement for the acquisition of a pharmaceutical manufacturing facility located in Phoenix, Arizona (USA)

Operating revenue €Mn



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

Specialty pharma business €Mn

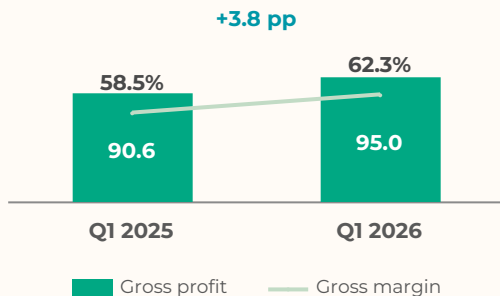


(*) "Other operating income" includes service activities that are not material to the Group.

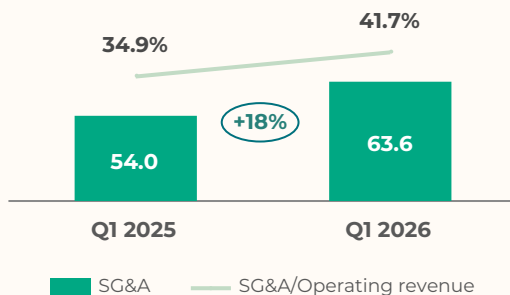
⁽¹⁾Contract Development and Manufacturing Organisation

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>

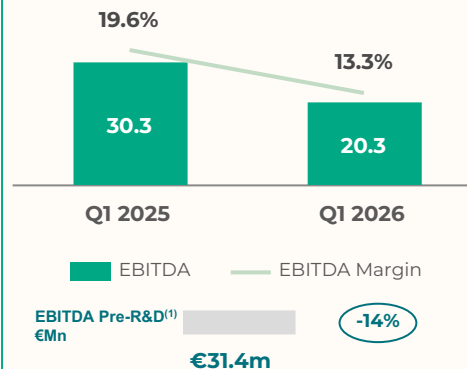
Gross profit €Mn



SG&A expenses €Mn



EBITDA €Mn



R&D expenses €Mn €11.2

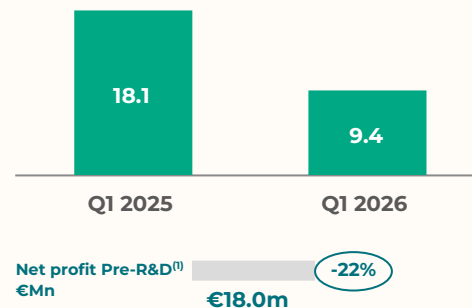
+79%

Product	Potential Indication	Current Situation	Key Milestones
Risperidone ISM®, monthly	Schizophrenia	Approved	Marketed in Europe, and in Australia & Taiwan
Letrozole ISM®, annual	Breast Cancer	Clinical development on hold	Phase I: Superior oestrogen suppression vs Femara®
Letrozole SIE ⁽¹⁾ , quarterly	Breast Cancer	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	Schizophrenia	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