First nine months 2025
FINANCIAL RESULTS

6 NOVEMBER 2025

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2025 first nine months financial results - highlights

Operating revenue in 9M 2025 was €525.1 Mn, a 7% decrease on 9M 2024, mainly due to the performance of the CDMO business. However, sales of the specialty pharmaceutical business increased 10% to €343.4 Mn in 9M 2025.

Positive evolution of Okedi® (Risperidone ISM®), which had total sales of €41.0 Mn in 9M 2025. Okedi® sales increased 102% in 9M 2025 vs 9M 2024, and 81% in Q3 2025 vs Q3 2024.

Sales of the heparin franchise (low-molecular-weight heparins (LMWH) and other heparins) increased by 7% to €189.8 Mn in 9M 2025, mostly due to an increase in orders from international partners. Enoxaparin was the main contributor to the growth of the division, with sales rising 11% to €112.8 Mn due to higher order volumes from partners during the period.

Good performance of Neparvis®, sales of which increased by 10% in 9M 2025 rising to €42.1 Mn.

In Q3 2025, ROVI signed an agreement with Sandoz to market Rolcya® (denosumab), which corresponds to Prolia® of Amgen, in Spain. This medicine is indicated for the treatment of osteoporosis. Under the terms of this 10-year agreement, ROVI will handle the promotion and distribution in Spanish territory of Rolcya®. ROVI will start to market Rolcya® in November 2025. According to data from IQVIA, the annual denosumab market is estimated at €70 Mn per year and Rolcya® aims to reach maximum annual sales of between €10 Mn and €15 Mn.

Gross margin was 67.1% in 9M 2025, an increase of 3.5 pp on 9M 2024. This increase was impacted by the recognition of revenue associated with the R&D aid awarded by the CDTI for the LAISOLID project which is recorded under the "Other income" line. However, excluding the impact of "Other income", gross margin would have increased by 1.8 pp to 65.3% mainly due to: (i) the increased contribution of Okedi® sales, which added high margins; and (ii) the decrease in LMWH raw material prices, which had a positive impact on gross margin.

In 2025, ROVI expects its operating revenue to decrease by a mid-single-digit percentage in comparison with 2024.

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Key milestones achieved in 9M 2025 - Roche's supply agreement, acquisition of an injectable drug product manufacturing site in USA, aid awarded by the CDTI, and acquisition of majority stake in CellsIA

ROVI announces a collaboration with Roche for the manufacture of a new medicine in development

- ROVI will collaborate with F. Hoffmann-La Roche Ltd. for the manufacture of Roche's new medicine, which is currently in clinical development, from Roche's metabolic and cardiovascular portfolio. For 2030, ROVI estimates that the agreement will contribute with a minimum increase of between 20% and 25% in CDMO business sales vs 2024 figure.

Acquisition of an injectable drug product manufacturing site in Phoenix, Arizona (USA)

- On 29 September 2025, ROVI announced that ROIS Phoenix Inc., a wholly owned subsidiary of ROVI Pharma Industrial Services, S.A.U., had entered into an Asset Purchase Agreement with Bristol Myers Squibb ("BMS") for the acquisition of a drug manufacturing facility located in Phoenix, Arizona (USA) together with a series of assets and liabilities related thereto (the "Transaction")
- As part of the Transaction, ROIS Phoenix Inc. has entered into a Toll Manufacturing Agreement with BMS, which regulates the conditions under which ROIS Phoenix Inc. will continue to manufacture for BMS at the facility. The agreement has an initial term of 5 years from the closing of the Transaction and provides for a minimum payment of $50 Mn for each year of the contract.
- The acquisition of the facility will be made for a price which is not material for ROVI and will be subject to the fulfillment of certain customary conditions precedent set out for this type of transaction. The completion of the Transaction is expected to take place during the H1 2026.

Final decision to award aid of €36.3 Mn for ROVI's LAISOLID project subsidised by the CDTI

- On 9 July 2025, the Technological Development and Innovation Centre (CDTI) published the final decision confirming the award of aid of 36.3 million euros for ROVI's LAISOLID project. This aid covers the period running from January 2023 to August 2026.

Funded by the European Union NextGenerationEU

GOBIERNO DE ESPAÑA MINISTERIO DE CIENCIA, INNOVACIÓN Y UNIVERSIDADES

CDTI INNOVACIÓN

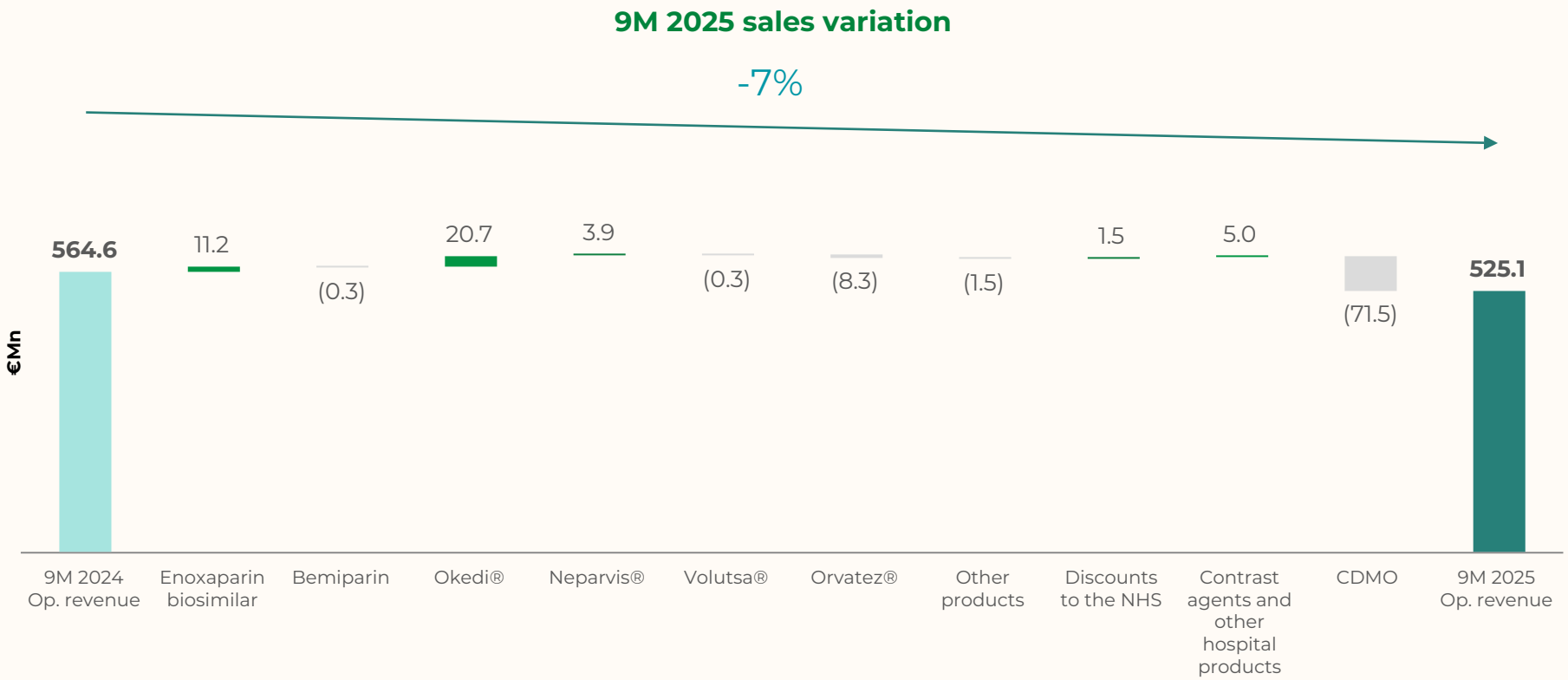
Plan de Recuperación, Transformación y Resiliencia

ROVI acquires a majority position in Cells IA Technologies, S.L.

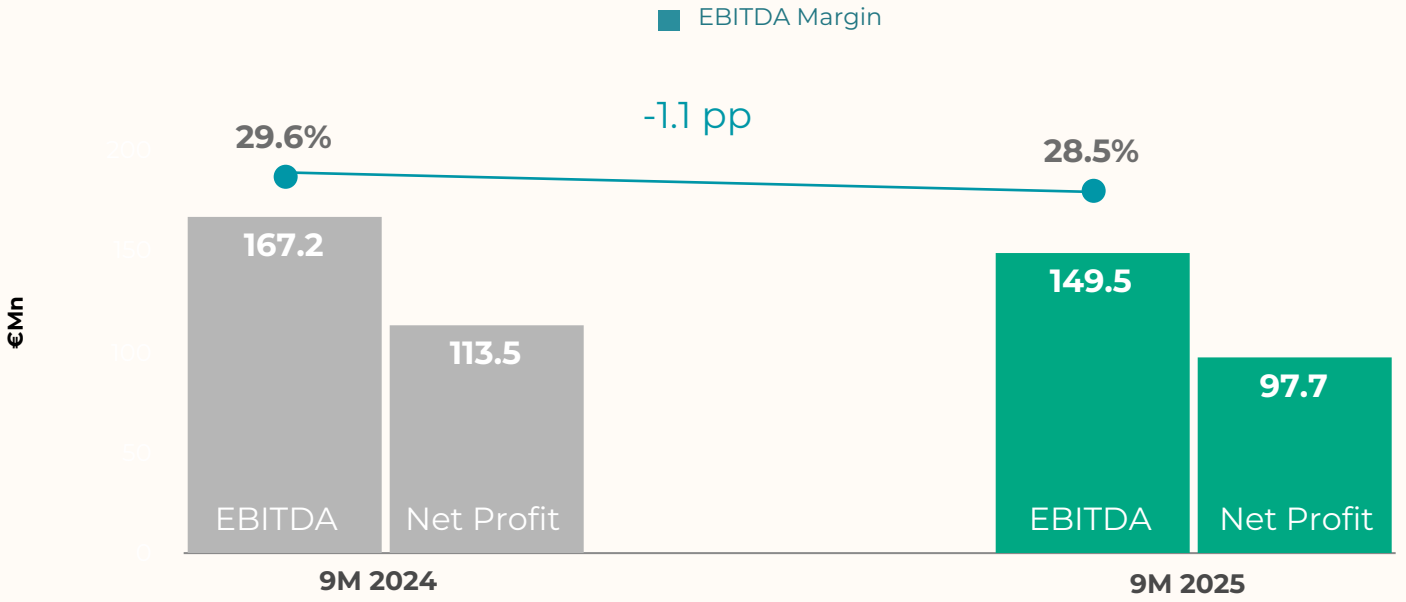
- ROVI continues to advance in the AI field. In January 2025, ROVI acquired a majority position in Cells IA Technologies, S.L., a pioneering company in the development of artificial intelligence-assisted diagnosis in the pathological anatomy area.

OPERATING RESULTS

Okedi®, enoxaparin biosimilar, Neparvis®, and the contrast agents and other hospital products division, key growth drivers within the specialty pharma business



Evolution of EBITDA and net profit



- EBITDA was €149.5 Mn in 9M 2025, a decrease of 11% compared to 9M 2024.
  - EBITDA margin decreased 1.1 pp to 28.5% in 9M 2025 from 29.6% in 9M 2024.
- Net profit amounted to €97.7 Mn in 9M 2025 from €113.5 Mn in 9M 2024.

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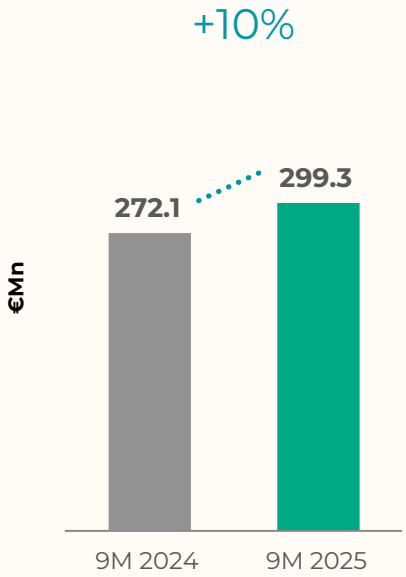
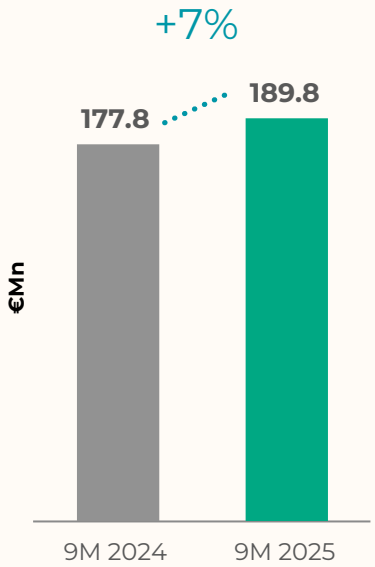
ROVI aspires to become a benchmark player in the LMWH field worldwide

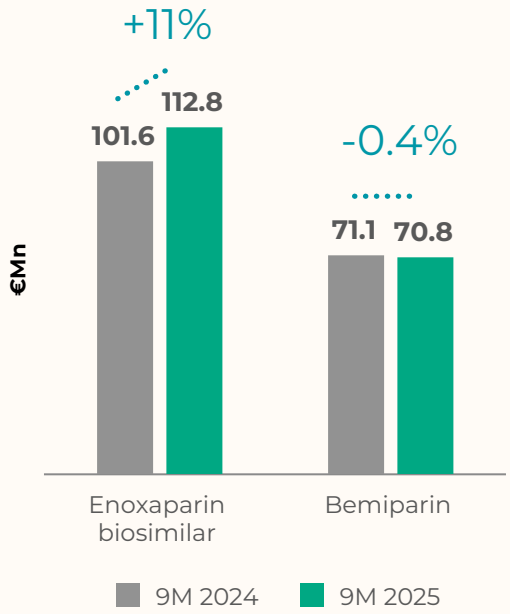
Prescription-based sales



Heparin franchise sales



LMWH sales



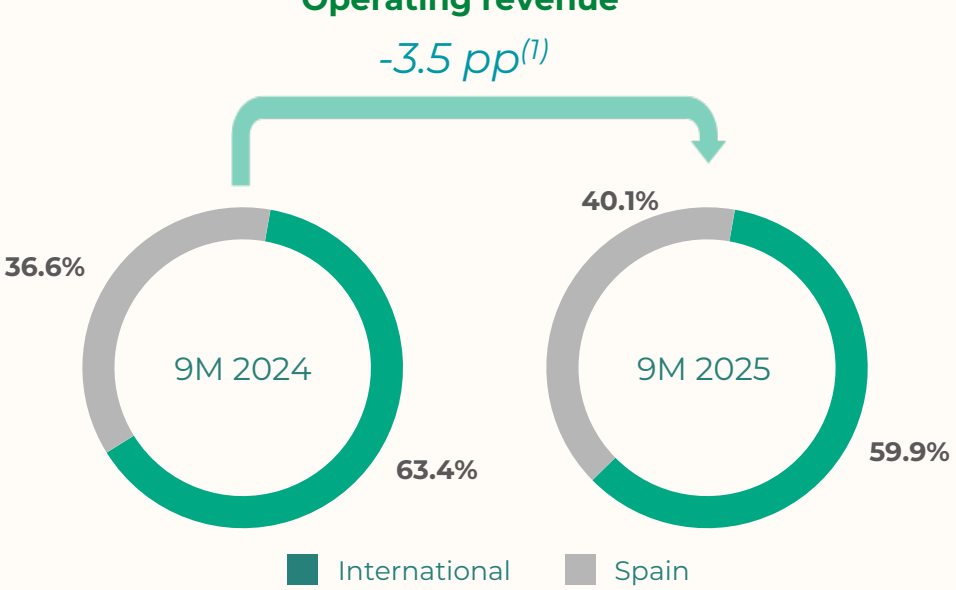
- Sales of prescription-based pharmaceutical products increased by 10% to €299.3 Mn in 9M 2025.
- Sales of the heparin franchise[1] increased 7% to €189.8 Mn in 9M 2025 due to an increase in orders from international partners during 9M 2025.
- Heparin sales represented 36% of operating revenue in 9M 2025 compared to 31% in 9M 2024.

(1) Heparin franchise includes low molecular weigth heparins and other heparins. Other heparins are reported in the "Contrast agents and other hospital products" line.

ROVI's internationalisation strategy as one of its pillars of future growth

- Well positioned to drive long-term leadership in low-molecular-weight heparins (LMWH).
- Sales outside Spain decreased 12% in 9M 2025, mainly due to the decrease in sales from the CDMO business.
- Sales outside Spain represented 60% of operating revenue in 9M 2025, compared to 63% in 9M 2024.

Operating revenue



(1) Variation in international sales between 9M 2024 and 9M 2025 in percentage points.

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Growth evolution of enoxaparin biosimilar

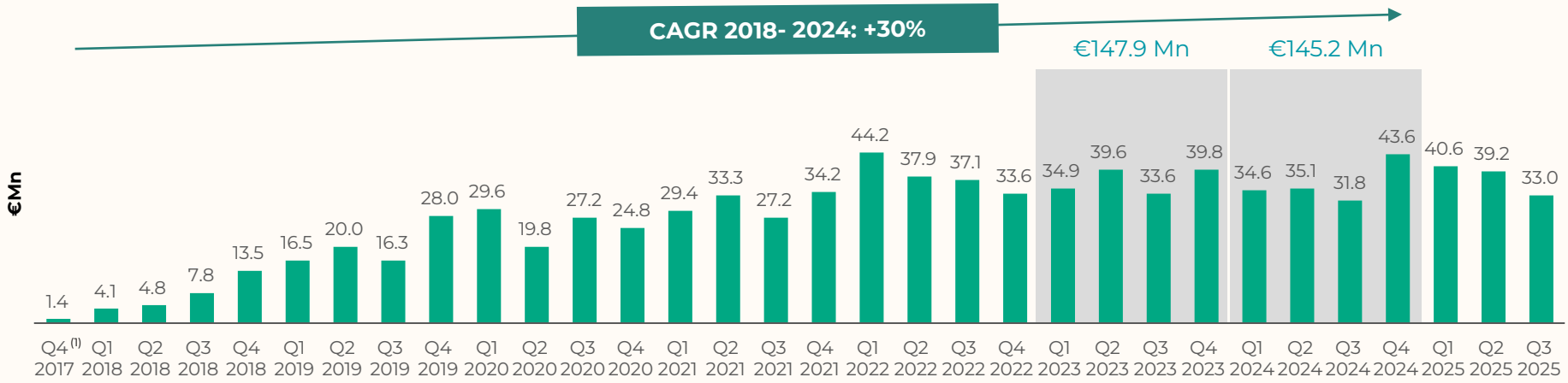
Well-established network to minimize time-to-market

Approved in **26 countries in Europe** and 33 **in the rest of the world**

Directly marketed in **Germany, UK, Italy, France, Austria, Portugal and Spain**

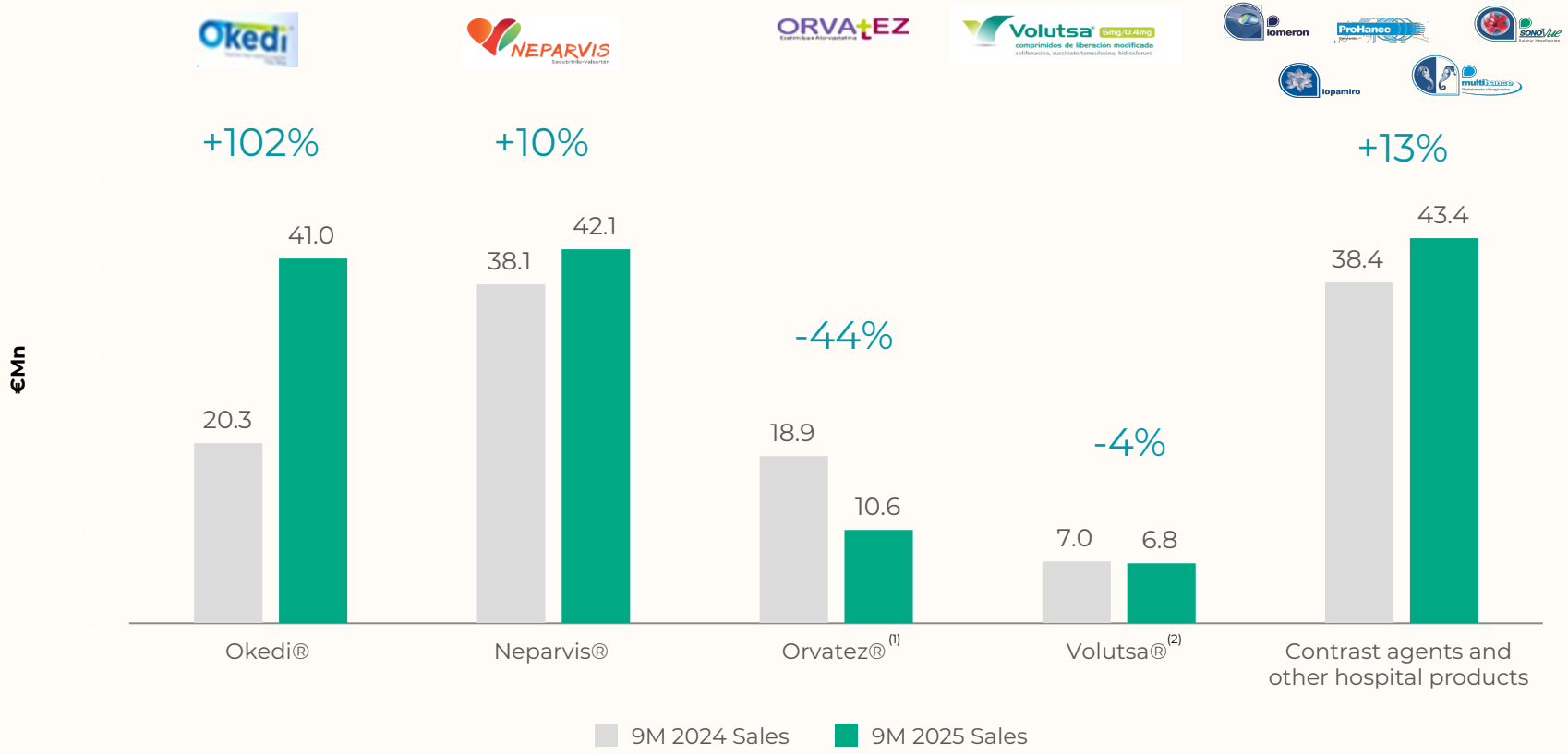
Expansion in other markets through **out licensing agreements with international partners: 81 territories signed**

Enoxaparin biosimilar sales ramp-up



(1) Becat® 4Q 2017 sales include sales throughout September. As the product was launched that month, sales were negligible.

Okedi®, Neparvis® and contrast agents and other hospital products, key drivers of the performance of the specialty pharma business



(1) Decrease in sales was mainly due to the competitive environment following the entry of generics. ROVI dropped its price by 40% in October 2024.
(2) Volutsa® price decreased by 47% in Q2 2023.

Value added CDMO services

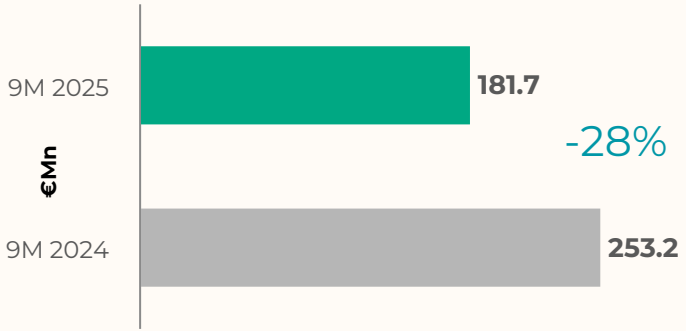
CDMO business[1]

- **Moderna**: 10-year global agreement covering end-to-end manufacturing of COVID-19 and RSV[2] vaccines, including API COVID-19 production in Granada and fill-and-finish in Madrid. Also includes participation in Moderna's pipeline for next-generation mRNA vaccines.
- **Global Pharma Partner**: Agreement to manufacture up to 100 million pre-filled syringes annually using a high-speed line at the San Sebastián de los Reyes facility. ROVI's CDMO division expects to have a positive revenue increase impact ranging between 20%-45% vs 2023 sales.
- **Bristol Myers Squibb (BMS)**: ROIS Phoenix signed a 5-year Toll Manufacturing Agreement, which provides for a minimum payment of $50 Mn for each year of the contract.
- **Roche**: Collaboration agreement to manufacture of a new medicine, currently in clinical development, from Roche's metabolic and cardiovascular portfolio. For 2030, ROVI estimates that the agreement will contribute to a minimum increase of between 20%-25% in CDMO sales vs 2024 figure.

New capacities for industrial plants

San Sebastián de los Reyes	· The first high-speed PFS filling line (36,000 syr/h) has already been installed and qualified. The FDA has inspected and approved the line (No Action Indicated) to produce the mRNA COVID vaccine in July 2024. · The second of the lines (isolator technology-36,000 syringes/h) was installed in August 2024, is undergoing qualification, and will be used to meet the demand stipulated in the aforementioned agreement with a global pharmaceutical company. · The third high-speed filling line (isolator technology-36,000 syringes/h) will be installed in Q2 2026 with capacity to manufacture PFS or cartridges.
Alcalá de Henares	· Four direct PFS cartoning packaging lines (24,000 syr/h) have been installed. Two of them are qualified and are in operation to cover US seasonal COVID vaccine. The other two have been installed in a new production building at the same plant. · In 2025 and 2026, two assembly lines will be installed to assemble cartridges into pens.
Madrid	· A new line was installed in Q1 2025 with a capacity to manufacture PFS or cartridges.
Phoenix	· Vial line currently being used for the manufacture of BMS cytotoxic products. · New optima PFS filling line with isolator technology to be installed in a segregated area in 2027, adding a capacity of 65m-70m PFS

CDMO evolution (Sales)



CDMO sales decreased by 28% to €181.7 Mn in 9M 2025 as a result of:

- the booking of negligible revenue related to the activities carried out to prepare the plant for production of the vaccine under the agreement with Moderna in 9M 2025 vs 9M 2024,
- lower revenues from the production for Moderna, and
- lower revenues from existing customers (excluding Moderna) as a result of the closure of the Madrid facility, for approximately 4 months in 2025, to upgrade some Annex 1 GMP[3] aspects for sterile manufacturing. As a result of this closure, some production for existing clients was brought forward to Q4 2024, and other production has been postponed to the remainder of the full year 2025.

(1) Agreements entered with ROVI Pharma Industrial Services, S.A.U.
(2) Respiratory syncytial virus
(3) Good manufacturing practices

ISM® Platform opens up new avenues of growth for ROVI

Overview

- Internally-developed and patented innovative drug-release technology, ISM®(1), which allows for the sustained release of compounds administered by injection
- Based on two separate syringes containing, respectively, (i) the drug and polymer (solid state) and (ii) the solvent (liquid state)
- Potential wide applicability of ISM® technology to new chronic therapeutic areas, including psychiatry and oncology
- 505(b)(2) path of approval for candidates leveraging ISM® technology

Product	Potential Indication	Current Situation	Key Milestones
Risperidone-ISM®, monthly	**Schizophrenia**	Aproved	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(2), 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, 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

Key Company Highlights of ISM® Platform

1	**Predictability**	Pop PK(3) model & simulations already validated for Risperidone-ISM® in Phase I & II Clinical Program	Expected high success rate in Phase III in new developments
2	**Usability**	Improved stability	No cold chain needed
3	**Flexibility**	Selecting the most convenient posology depending on clinical needs	From 1 to 12 months administration
4	**Improved Clinical Management**	Long-acting injection (1-12 months) plasma therapeutic levels from day 1	Rapid onset & sustained clinical effect
5	**Vertical Integration**	Technological barriers (e.g. power filling) Strong IP Manufacturing capabilities	Protected technology Fully integrated manufacturing plants

(1) ISM® stands for *In Situ Microimplants.*
(2)Superior Inhibition of Estrogen
(3) PK stands for pharmacokinetic

Outlook 2026

2026 operating revenue growth rate

Increase by between a high single-digit and low double-digit percentage vs 2025

The key growth levers in 2026

Specialty Pharma	CDMO
Launch of Risperidone ISM® in new countries	Manufacturing Agreement with Moderna
LMWH franchise	Other agreements
Existing portfolio of specialty pharmaceuticals	Manufacturing Agreement with BMS
New product distribution licenses	Capacity increase
New diagnosis solutions powered by artificial intelligence	New formats (cartridges)

FINANCIAL RESULTS

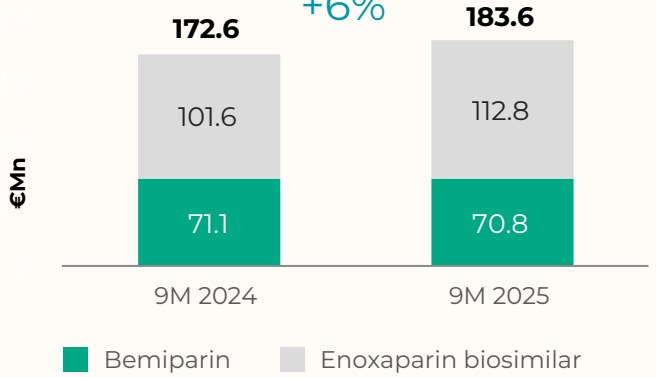
Revenue level affected by the performance of the CDMO business

Operating revenue

-7%

LMWH sales

+6%



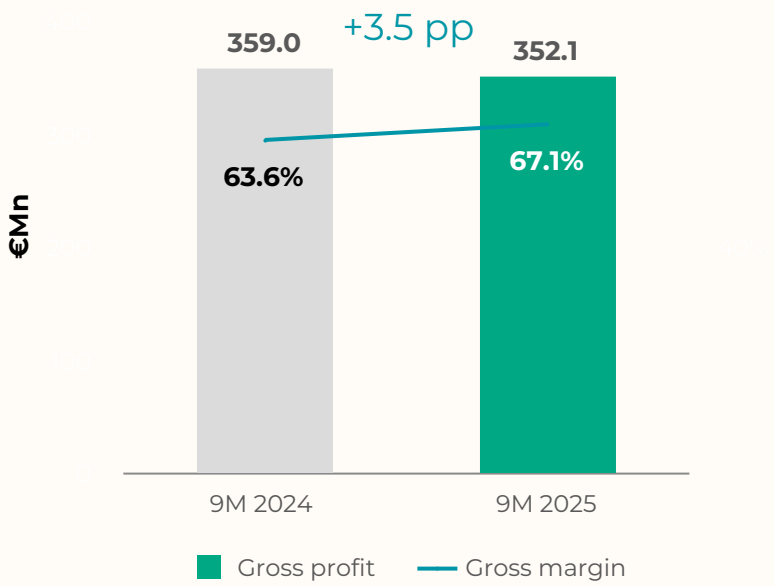
Operating revenue decreased 7% to €525.1 Mn in 9M 2025 driven by the performance of the CDMO business, which decreased 28% to €181.7 Mn, compared to €253.2 Mn in 9M 2024. However, sales of the specialty pharmaceutical business increased 10% to €343.4 Mn in 9M 2025 from €311.4 Mn in 9M 2024, mainly due to the strong performance of both Okedi® and the heparin franchise. Total revenue decreased 5% to €534.1 Mn in 9M 2025.

Sales of **LMWH** increased by 6% to €183.6 Mn in 9M 2025:

- **Enoxaparin biosimilar** sales increased by 11% to €112.8 Mn, mainly due to the increase in orders from international partners in 9M 2025.
  - ROVI expects Q4 2025 to be the strongest quarter of the year in terms of sales, as a higher volume of orders from partners is anticipated.
  - For full-year 2025, ROVI expects a mid-single-digit percentage increase in sales compared to 2024.
- **Bemiparin** sales slightly decreased by 0.4% to €70.8 Mn, mainly due to lower sales in Spain (Hibor®) vs 9M 2024.
  - ROVI expects Q4 2025 to be the strongest quarter of the year in terms of sales, as a higher volume of orders from partners is anticipated.
  - For full-year 2025, ROVI expects a low-single-digit percentage increase in sales compared to 2024.

Gross margin positively impacted by the R&D aid awarded by the CDTI for the LAISOLID project, the increased contribution of Okedi®'s sales and the decrease in LMWH raw material prices

Gross profit and Gross margin



Gross margin impacts

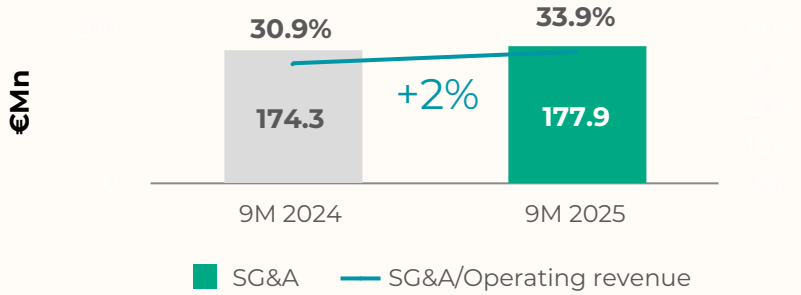
Gross profit decreased by 2% to €352.1 Mn in 9M 2025.

Gross margin increased from 63.6% in 9M 2024 to 67.1% in 9M 2025, an increase of 3.5 pp. This increase was impacted by the recognition of revenue associated with the R&D aid awarded by the CDTI for the LAISOLID project, which is recorded under the "Other income" line. However, excluding the impact of "Other income", gross margin would have increased by 1.8 pp to 65.3% mainly due to: (i) the increased contribution of Okedi® sales, which added high margins; and (ii) the decrease in LMWH raw material prices, which had a positive impact on gross margin.

In 9M 2025, raw material prices for LMWH fell 34% compared to 9M 2024. Likewise, a positive impact on gross margin is expected over the year as a result of the drop in LMWH raw material prices.

SG&A and commitment to R&D

SG&A expenses



R&D expenses

SG&A expenses increased 2% to €177.9 Mn in 9M 2025 vs 9M 2024. This increase was a consequence of higher "Employee benefit expenses (excl. R&D)", which increased by 8% in 9M 2025 vs 9M 2024, mainly due to (i) a 3% wage increase due to the entry into force of the XXI Collective Agreement of the Chemical Industry 2024-2026 in November 2024; along with (ii) the hiring of additional CDMO personnel. This increase was partially offset by a decrease of 4% in "Other operating expenses (excl. R&D)", driven by an efficient cost-containment policy.

R&D expenses increased 42% to €24.7 Mn in 9M 2025. These expenses are related to (i) the completion of the phase I clinical trials for Letrozole SIE and Quarterly Risperidone ISM®, and (ii) the preparation for the development of Letrozole SIE's phase III clinical trial.

(1) Source: https://www.feique.org/wp-content/uploads/2024/11/XXI-CONVENIO-GENERAL-DE-LA-INDUSTRIA-QUIMICA.pdf

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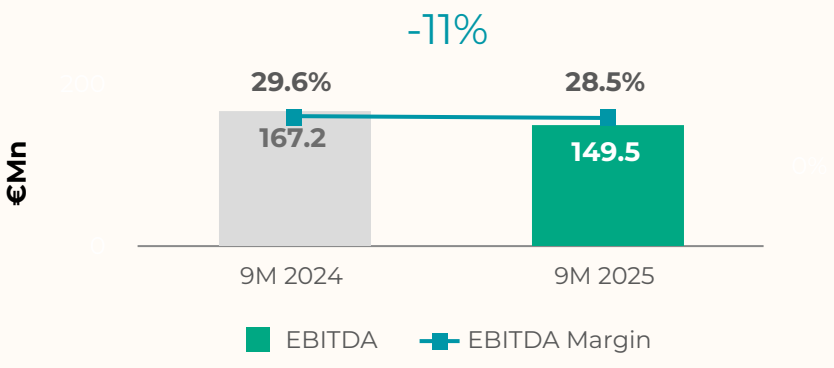
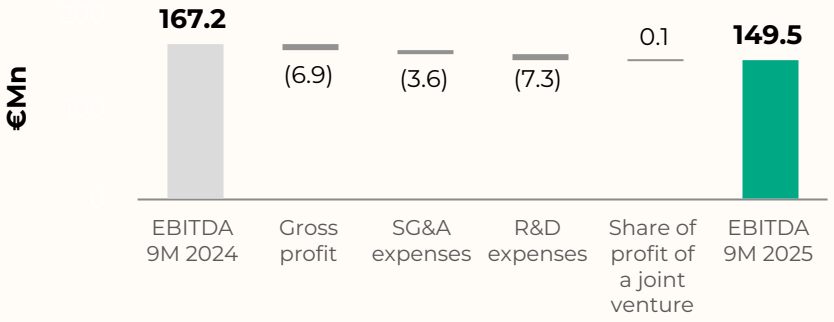
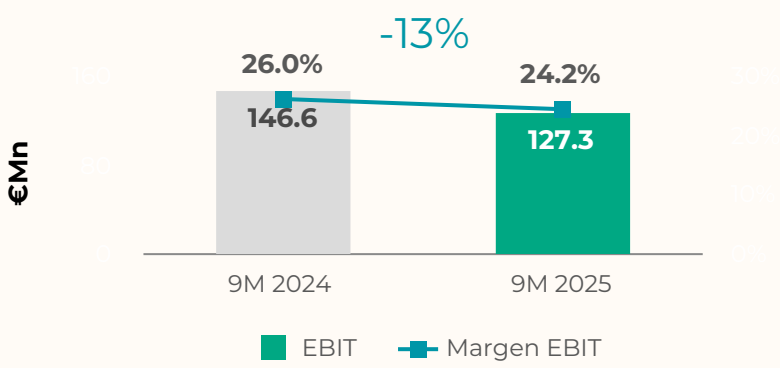
EBITDA, EBIT & Net Profit analysis

EBITDA

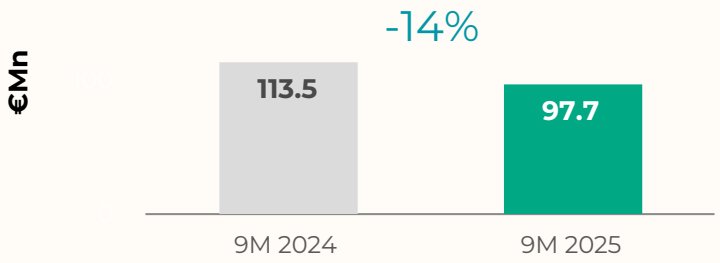




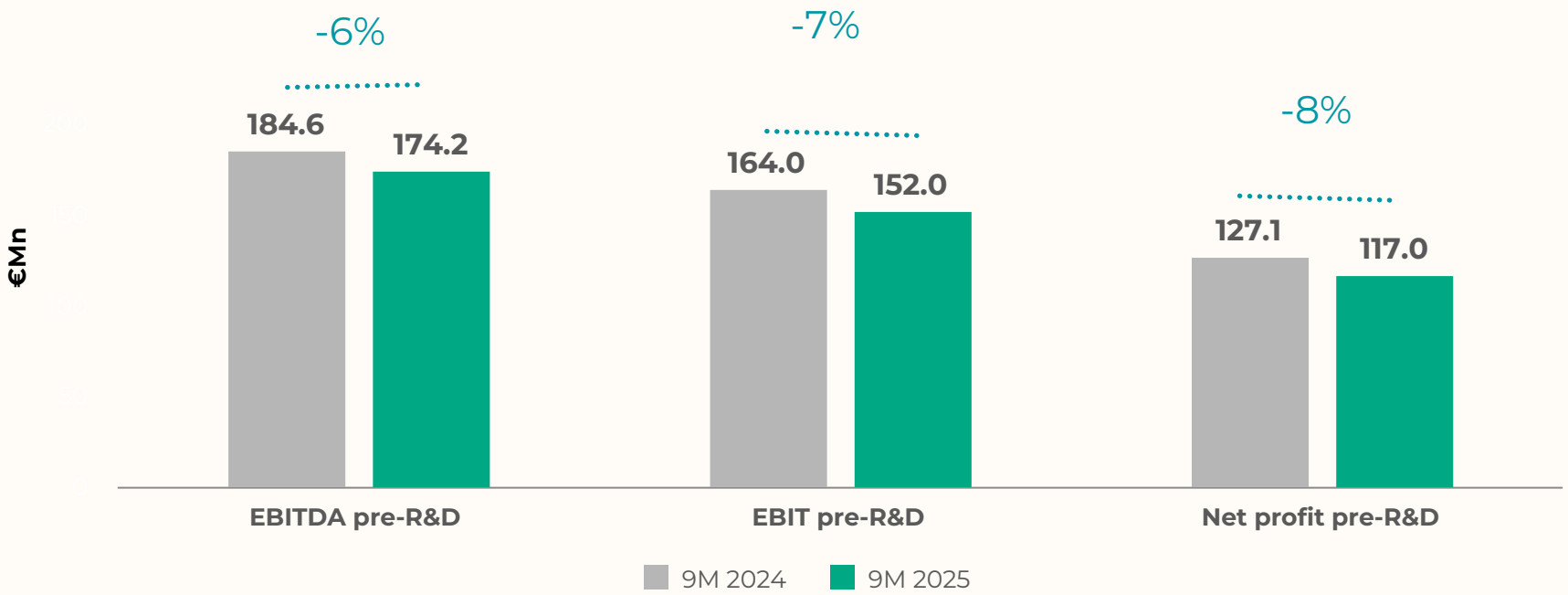
EBIT



Net Profit



Pre-R&D analysis[1]

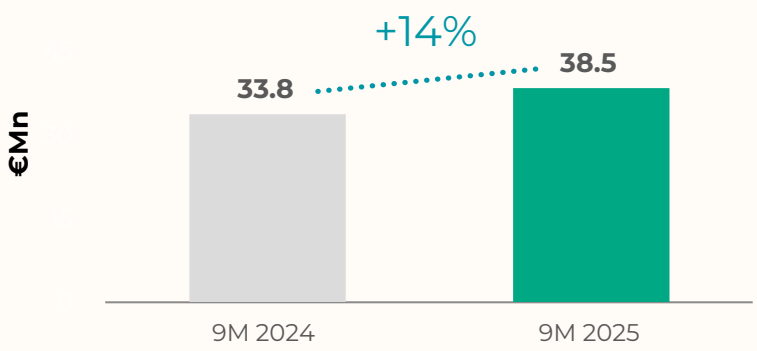


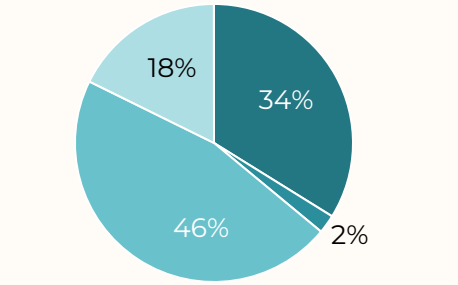
- **EBITDA "pre-R&D"** decreased by 6%, from €184.6 Mn in 9M 2024 to €174.2 Mn in 9M 2025.
- **EBIT "pre-R&D"** decreased by 7%, from €164.0 Mn in 9M 2024 to €152.0 Mn in 9M 2025.
- **Net profit "pre R&D"** decreased by 8%, from €127.1 Mn in 9M 2024 to €117.0 Mn in 9M 2025.

(1) EBITDA, EBIT and Net profit "pre-R&D" calculated excluding R&D expenses in 9M 2025 and 9M 2024.
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 IFRSs, please consult the information included on this subject on pages 16-18 and Appendix 2 (pages 36-40) of the press release on the financial results for the first nine months of 2025. 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.

Capital expenditure and Cash Flow

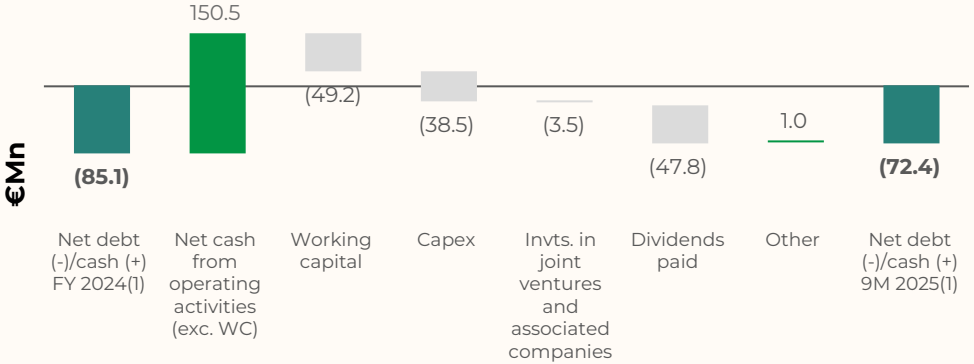
CAPEX evolution





- Maintenance Capex
- ISM industrialisation
- New filling lines and operations expansion
- Glicopepton

Cash Flow evolution



CF from operating activities increased by 56% to €101.4 Mn in 9M 2025 mainly due to:

- the increase of €40.1 Mn in "Proceeds from grants" item;
- the increase of €19.5 Mn in "Inventories" item in 9M 2025, vs a decrease of €4.3 Mn in 9M 2024.; and
- the decrease of €24.0 Mn in the “Trade and other payables” item in 9M 2025, vs a decrease of €36.4 Mn in 9M 2024.

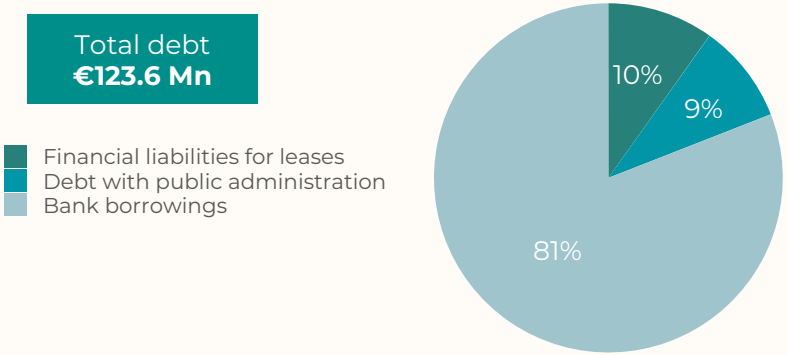
ROVI **invested** €38.5 Mn in 9M 2025 and the main investment projects are:

- New filling lines and operations expansion
- Glicopepton
- ISM® Industralization

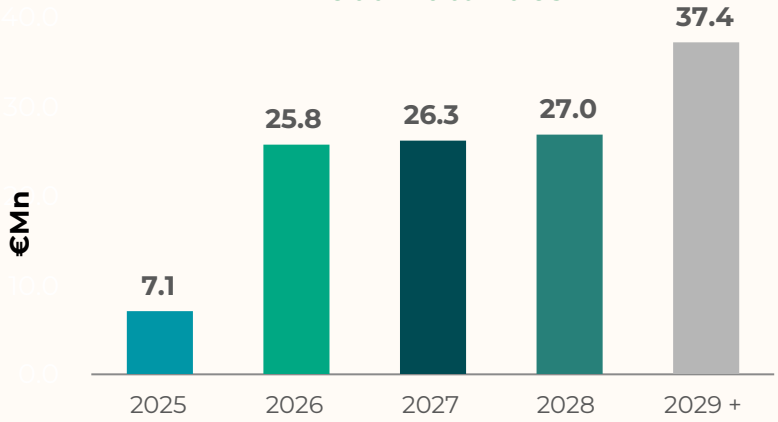
Debt analysis

Debt breakdown by source (%)

Total debt
€123.6 Mn



Debt maturities



- **Debt** with **public** administration represented **9% of total debt, with 0% interest rate.**
- **Net debt** of €72.4 Mn as of 30 September 2025 vs €85.1 Mn as of 31 December 2024.
- As of 30 September 2025, bank borrowings increased by €13.1 Mn.
- In June 2024, ROVI signed two loans of €25 Mn each at fixed rates of 3% and 3.49%, respectively). In June 2025, one of the loans was increased to €46.5 Mn, reducing its interest rate to 2.75%. The initial conditions of the other loan remain unchanged.
- ROVI's General Shareholders' Meeting, held on June 18th, approved the payment of a **gross dividend** of 0.9351 euros per share charged to the 2024 profit. This dividend represents 35% of the net profit for 2024 attributed to the parent company. This dividend was paid on 16 July 2025.

News flow 2025-2026

Specialty pharma	Additional new products to be launched
	Granting by the competent local authorities of the marketing authorisation of an enoxaparin biosimilar outside Europe
CDMO	Production progress of key manufacturing agreements ROIS Phoenix
ISM® technology platform	Marketing of Okedi® in Europe and rest of the world
	Phase III clinical trial of a new three-monthly formulation of letrozole (Letrozole SIE)
	Phase III clinical trial of risperidone for a 3-monthly injection

Alternative performance measures

In addition to the financial information prepared in accordance with International Financial Reporting Standards ("IFRSs") taken from our financial statements, this document includes certain alternative performance measures ("APMs") as defined in the ESMA (European Securities and Markets Authority) Guidelines on Alternative Performance Measures of 5 October, 2015 (ESMA/2015/1415), as well as some non-IFRS financial indicators. The financial measures contained in this document that are considered APMs or non-IFRS financial indicators have been prepared on the basis of the ROVI Group's financial information but are not defined or set out in detail within the framework of the applicable financial information and have not been audited or reviewed by ROVI's auditors.

These APMs are considered figures that have been adjusted in respect of those that are presented in accordance with the International Financial Reporting Standards endorsed by the European Union (IFRS-EU), which form the applicable accounting framework for the consolidated financial statements of the ROVI Group. Therefore, the reader should consider them to complement the latter but not to replace them.

ROVI uses these APMs and non-IFRS financial indicators to plan, oversee and assess its performance. ROVI considers the APMs and non-IFRS financial indicators to be useful to allow the management team and investors to compare the past or future financial performance, the financial situation and the cash flows. Notwithstanding, these APMs and non-IFRS financial indicators are considered complementary and are not intended to replace IFRS measures. Furthermore, other companies, including some in ROVI's sector, may calculate such measures differently, which reduces their usefulness for comparative purposes.

To obtain further information on the alternative performance measures (APMs) and non-IFRS financial indicators used by ROVI, 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 IFRSs, please consult the information included on this subject on Appendix 2 (pages 36-40) of the press release on the financial results for the first nine months of 2025. 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).

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