



# INTERMONTE ROADSHOW

June, 20th | Milan





OMER  
OVERVIEW

## KEY FIGURES



**30 YEARS** of expertise in rolling stock manufacturing



**3 INDEPENDENT PRODUCTION SITES** (2 in Italy & 1 in the USA)



**7 PRODUCTION FACILITIES** fully integrated and digitized



**82,000 SQM** of which **33,700 COVERED SQM** 



**450 DEDICATED STAFF**



**2,000+ TRAINS** in operation worldwide with interiors developed and produced by OMER



**€ 124 MM** Backlog as at March 31, 2024

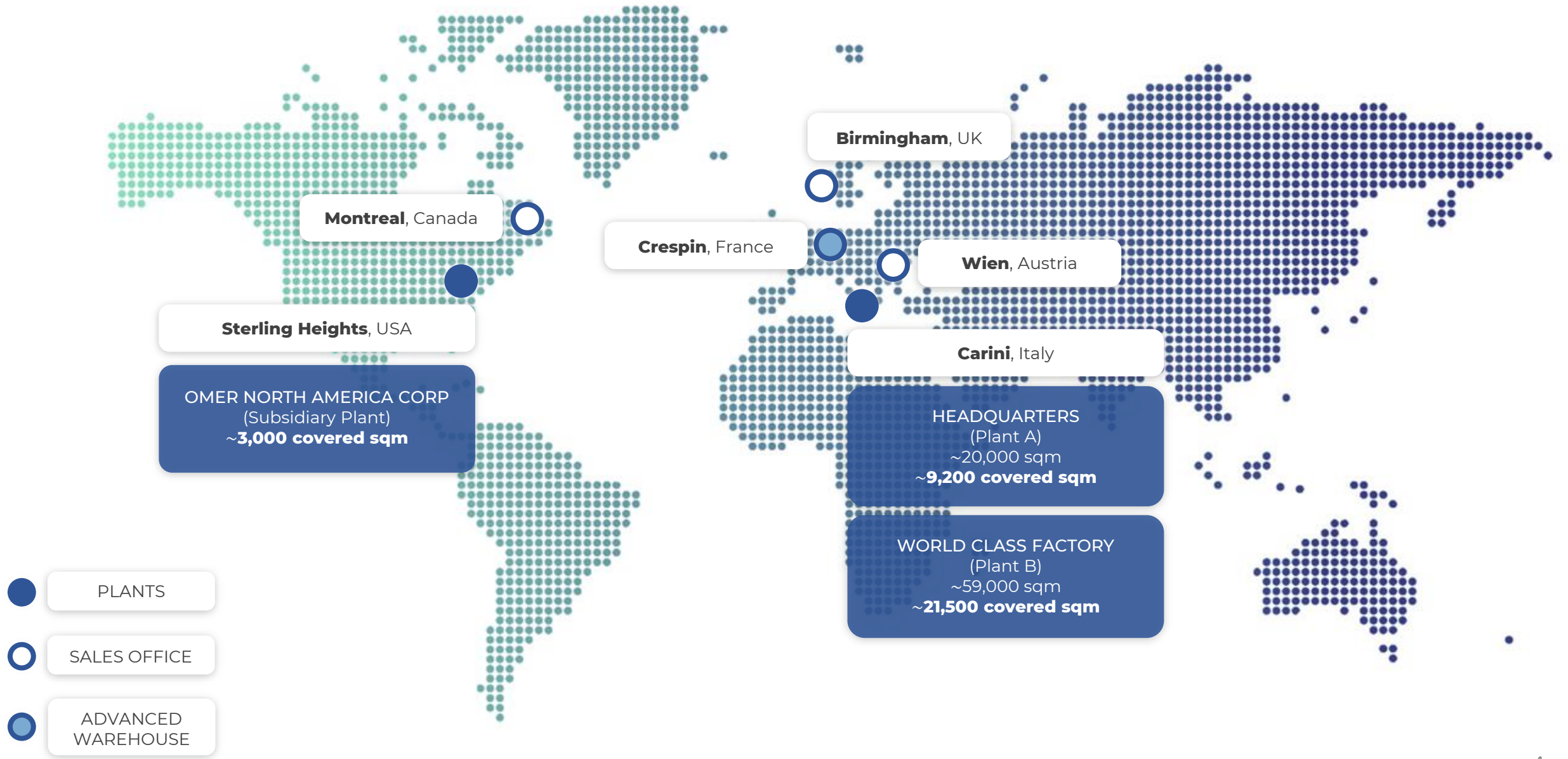


**€ 370 MM** Backlog & Soft Backlog as at March 31, 2024



**+25%** Total revenues CAGR 2018-2023

# OUR WORLDWIDE SITES



- PLANTS
- SALES OFFICE
- ADVANCED WAREHOUSE



CARINI, ITALY





# STERLING HEIGHTS, MICHIGAN, USA

Our subsidiary plant **specialized in the final manufacturing and assembly processes of products to be sold on the North American market** and in the commercial distribution of the OMER Group's products.





**WE PUT YOUR IDEAS ON TRACKS**



**INTERIORS**



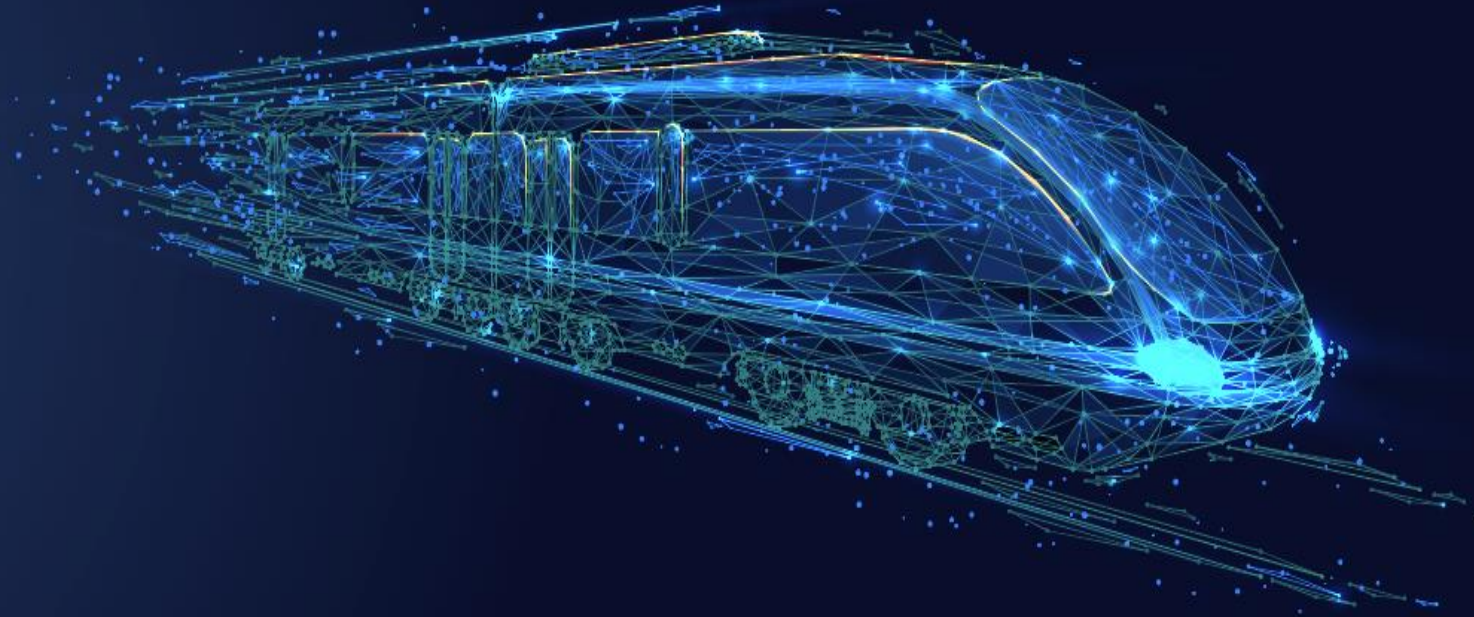
**DOORS**



**TOILETS**



**FAIRINGS**







PRODUCTS

WE GIVE CONCRETE SHAPE TO EVERY IDEA OF COMFORT

**From Subway to High-Speed Trains**



PRODUCTS

**ROCK | CARAVAGGIO** for HITACHI



PRODUCTS



**NEOVAL** for SIEMENS





**Modular Aluminum Toilet System**



**Modular Aluminum Toilet System**



**Frecciarossa ETR 1000** for HITACHI



PRODUCTS



**Frecciarossa ETR 1000** for HITACHI





**Frecciarossa ETR 1000** for HITACHI



**Avelia Amtrak** for ALSTOM

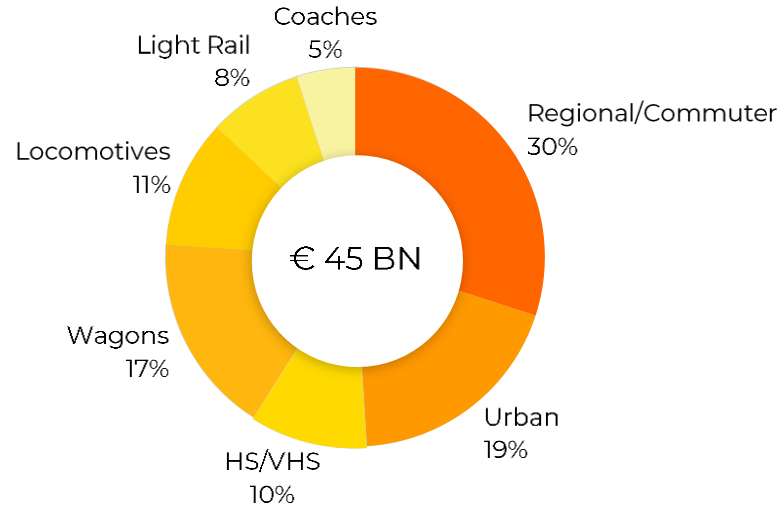
**ALSTOM****HITACHI**  
Inspire the Next **KNORR-BREMSE****SIEMENS****STADLER** **TRENITALIA** **EVAC**

# MARKET OVERVIEW



# MARKET OVERVIEW

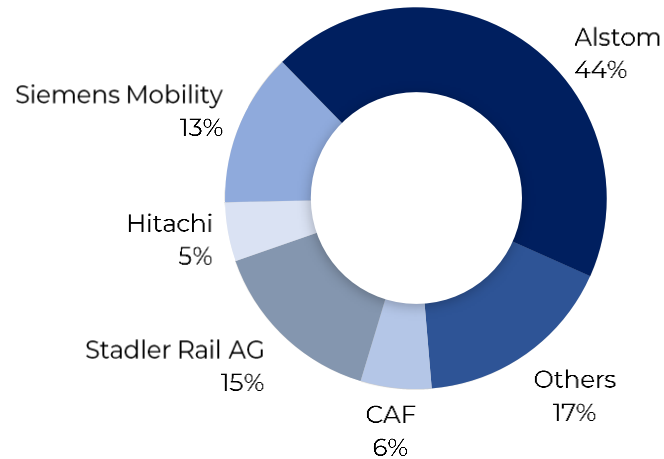
**UNIFE ACCESSIBLE  
MARKET 2020-2022  
(WRMS 2020)  
AVERAGE IN €  
BN/YEAR**



OMER addressable market in EU  
≈ 500-700 € mn

Rail sector demand expected to grow at a 2-3% CAGR <sup>(1)</sup> in the medium term, supported by rail policy addressing urbanisation, congestion, and low-carbon transport.

**MAIN TRAIN  
MANUFACTURES IN  
EUROPE IN 2019**



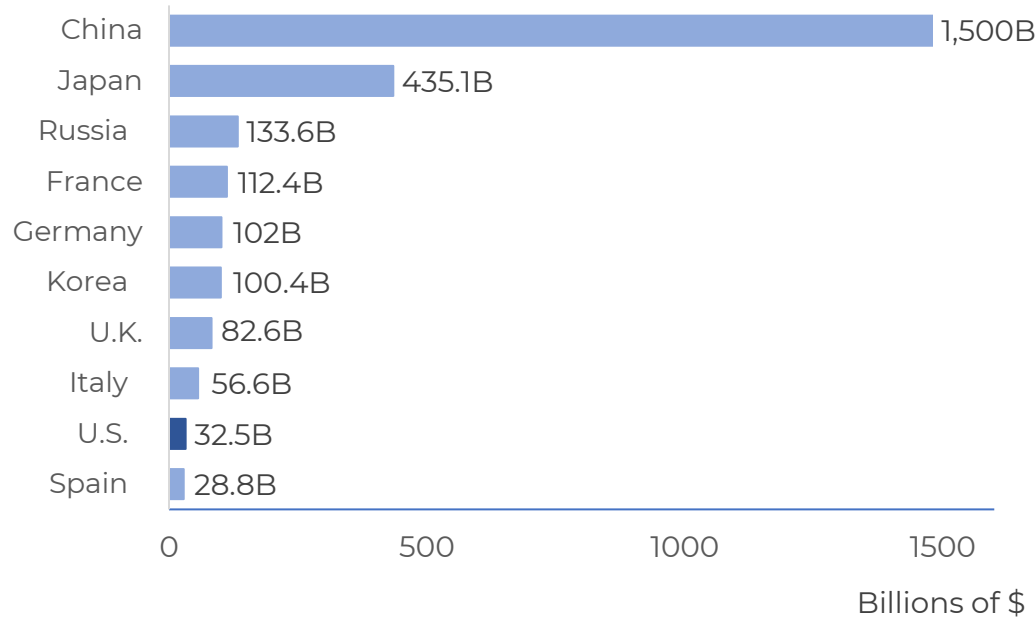
75% of OEM players  
in relationship with Omer

1) UNIFE World Rail Market Study 2020

# PASSENGER RAIL RIDERSHIP & INFRASTRUCTURE INVESTMENT BY COUNTRY

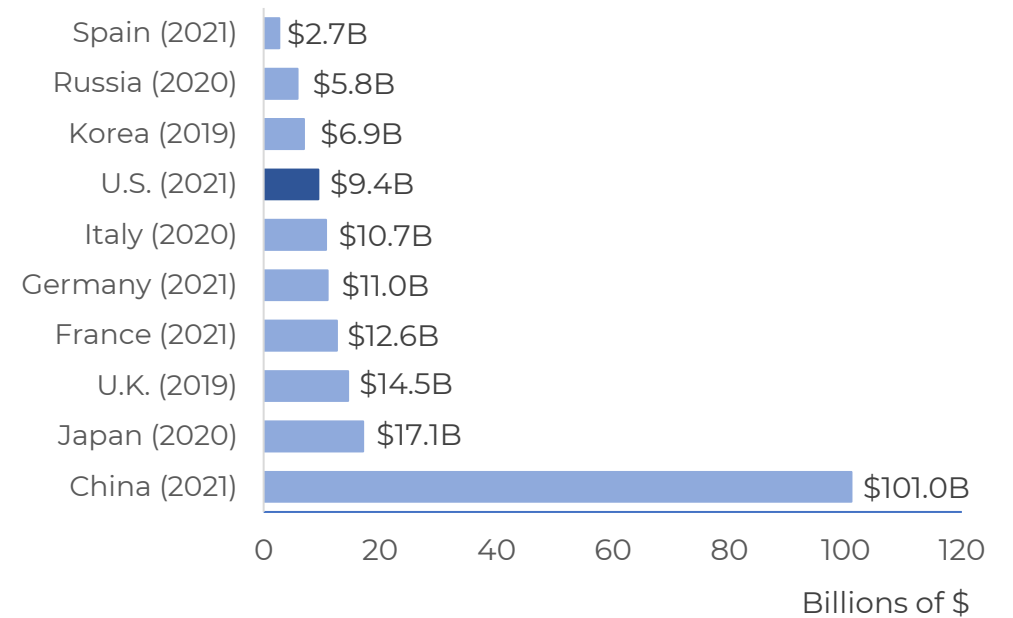
**Passenger Rail Ridership by Country in 2019**

(passenger-kilometers)



Train travel is an **opportunity** that Americans have yet to fully embrace. While the United States currently lags behind many industrialized nations in passenger rail ridership, there is **immense potential for growth and improvement in this area.**

**Infrastructure Investment by Country**



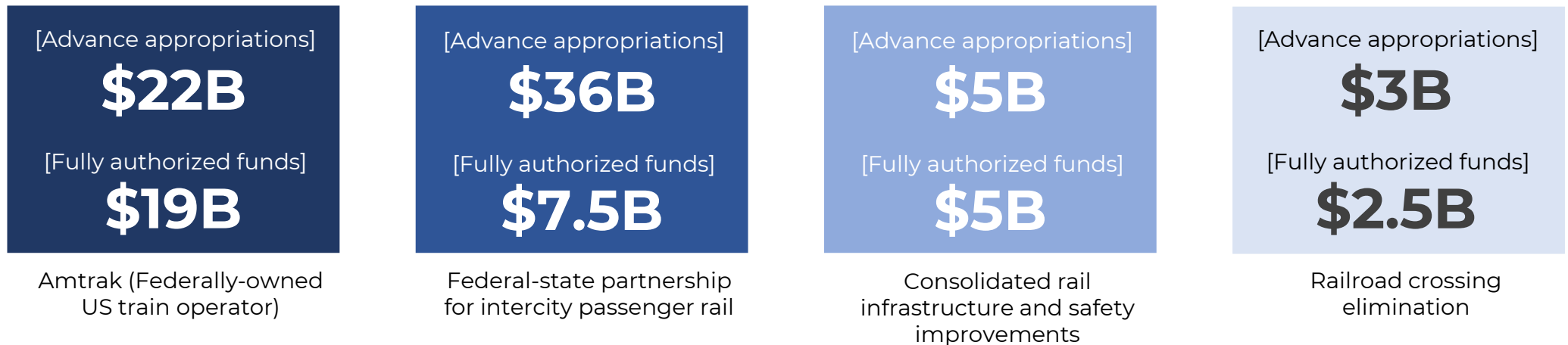
**Investment in passenger rolling stock** is expected to increase at a rate of **4.7% per year** between 2021 and 2026 across North America and **rail car manufacturing revenues** is expected to reach **2.9 billion** by 2028.



A big boost to the American rail industry has come from the **Infrastructure Investment and Jobs Act (IIJA)**, which was passed in 2021 and designates **\$66 billion** to improve the nation’s rail system.

It represents the most significant investment in passenger rail in the past 50 years and in public transit ever.

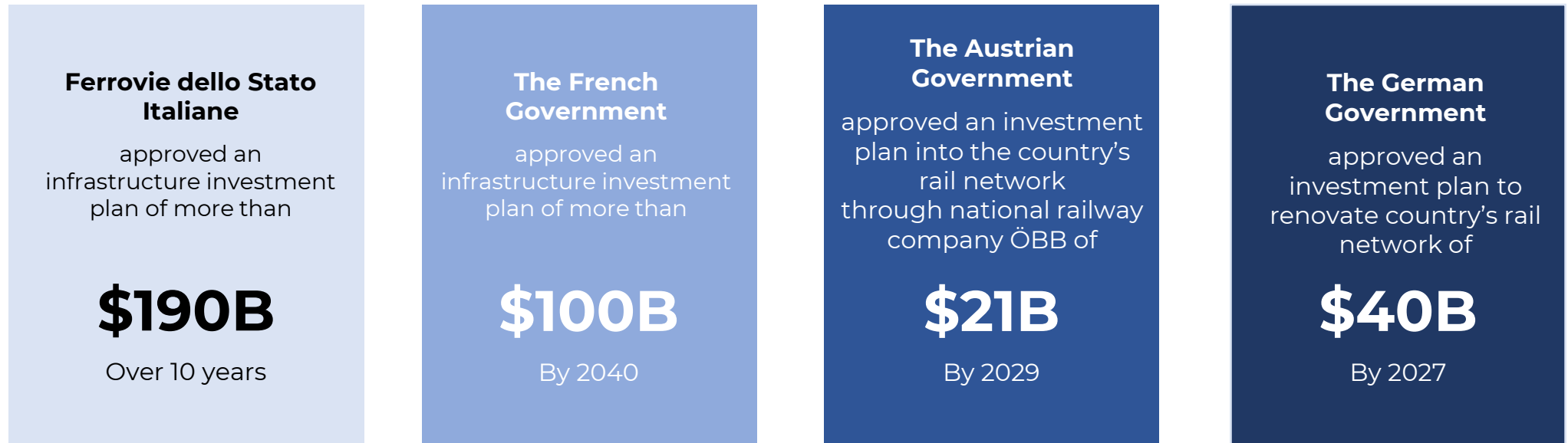
## \$66 billion in total funding FY22 - FY26



To take advantage of federal money, the government must prefer **US-made products** in purchases. (**Buy American Act** – 1933) As a result, many of the **world’s largest passenger train manufacturers** are **investing in their US operations**. (Ex. CRRC, Hitachi, Siemens, Alstom)



A big boost to the European rail industry has come from the national governments that all around Europe (as for instance in Italy, France, Austria and Germany) approved **significant infrastructure investment plans** to improve the country's rail network.

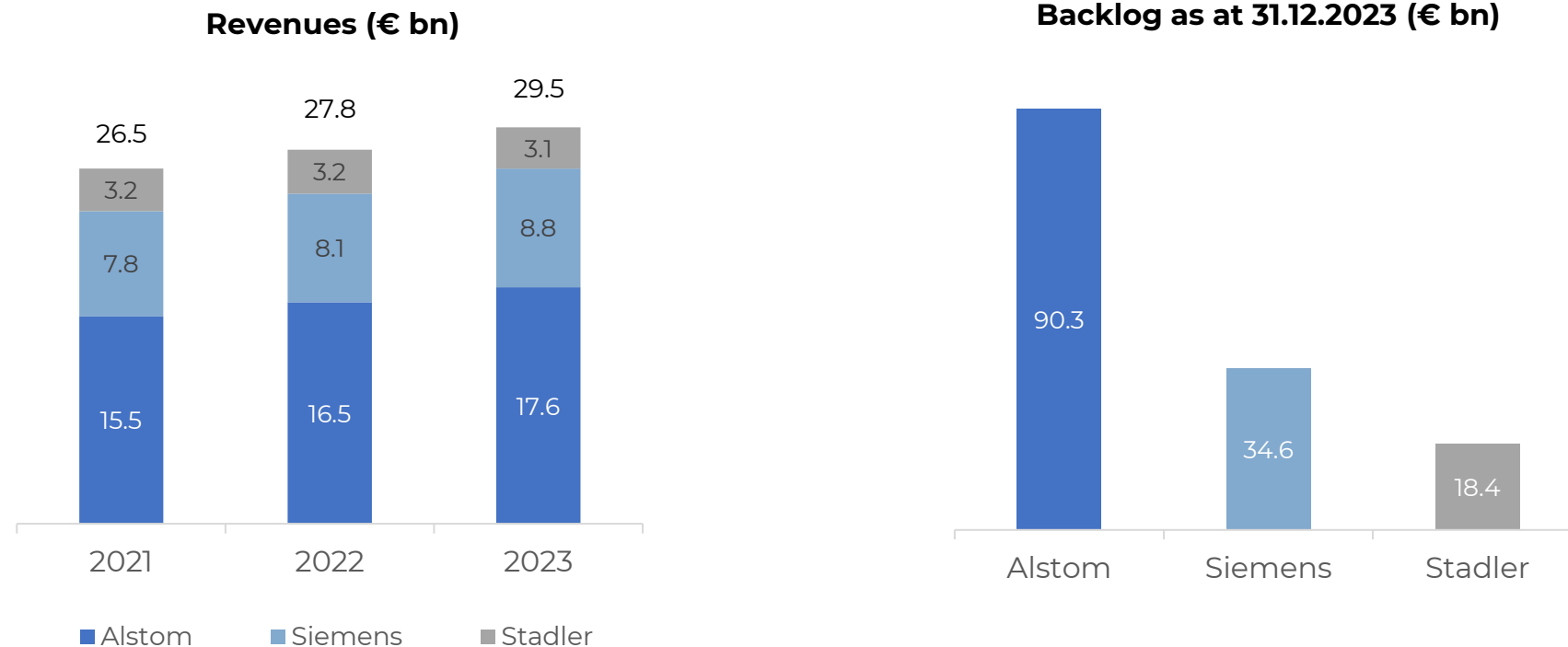


Moreover, the **European Green Deal** and the orientation towards **carbon neutrality by 2050**, which is directing the entire world towards the reduction of greenhouse gas emissions to safeguard the planet's ecosystem will have a **positive impact on the rail industry** and will produce more and more investment plans in rail infrastructure in the next future.



# MARKET OVERVIEW

The European and American rolling stock market is concentrated on a few operators, as Alstom, Siemens and Stadler, which are all characterized by increasing order books and revenue figures, and which expect a CAGR between 5 and 10% in the years to come.



**Alstom** ends the Fiscal Year on March 31<sup>st</sup> (ex. FY 2021 Results go from April 1<sup>st</sup>, 2021 to March 31<sup>st</sup>, 2022).

**Siemens** ends the Fiscal Year on September 30<sup>th</sup> (ex. FY 2021 Results go from October 1<sup>st</sup>, 2020 to September 30<sup>th</sup>, 2021). Both the revenues and the backlog refer to the “Mobility” segment, which includes Rolling Stock and Rail Infrastructure. Both values do not include the service business related to the “Mobility” segment.

**Stadler** ends the Fiscal Year on December 31<sup>st</sup>. Both the revenues and the backlog are in billions of CHF and they refer only to the “Rolling Stock” segment.

# OUR BUSINESS MODEL



# HOW WE DESIGN AND ENGINEER

A **DESIGN & ENGINEERING DEPARTMENT**  
MADE UP OF **30 ENGINEERS**  
SPECIALIZED IN



**FEM ANALYSIS**



**PRODUCT INDUSTRIALIZATION**



**CAD / CAM PROCESS MANAGEMENT**



**TOOL DESIGN AND MANUFACTURING**



**TEST TYPING**



# HOW WE PRODUCE



1

**BASE MANUFACTURING**



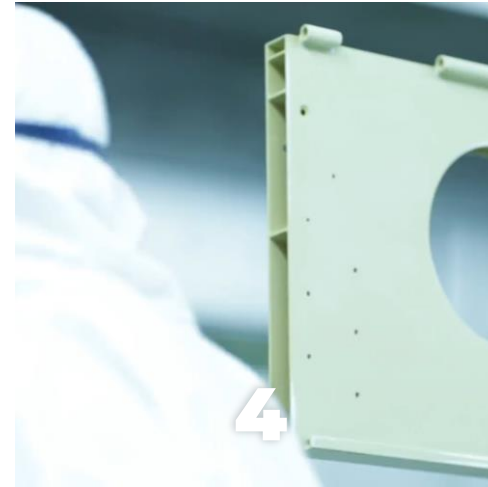
2

**FORMING**



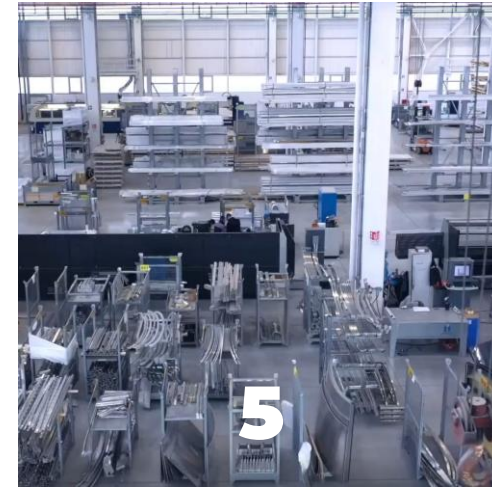
3

**BODY IN WHITE**  
(Welding and Bonding)



4

**PAINTING**  
(Liquid and Powder)

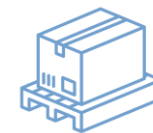


5

**ASSEMBLING**



**FIVE STEPS**  
**from raw material to market**



SHORT SUPPLY CHAIN  
ZERO OUTSOURCING  
MINIMIZED ERRORS  
QUICK TIMES



# CERTIFICATIONS



**Certification** *International Railway Industry Standard*

**IRIS Rev.03 -ISO/TS 22163:2017**

**ISO 9001:2015**

**ISO 14001:2015**

**EN 15085:2007 Part 2 – Level CL1**

**ISO 3834-2:2005**

**DIN 6701**





The 'ORIENT EXPRESS - LA DOLCE VITA' Experience

**A NEW RAILWAY BUSINESS MODEL**



The 'ORIENT EXPRESS - LA DOLCE VITA' Experience

# A NEW RAILWAY BUSINESS MODEL

The train journey is no longer just moving passengers.  
It becomes the main part of the travel experience and holiday.

# The 'ORIENT EXPRESS - LA DOLCE VITA' Experience

Technological solutions that enable comfort and lightweight and that combine the project style with the railway requirements.



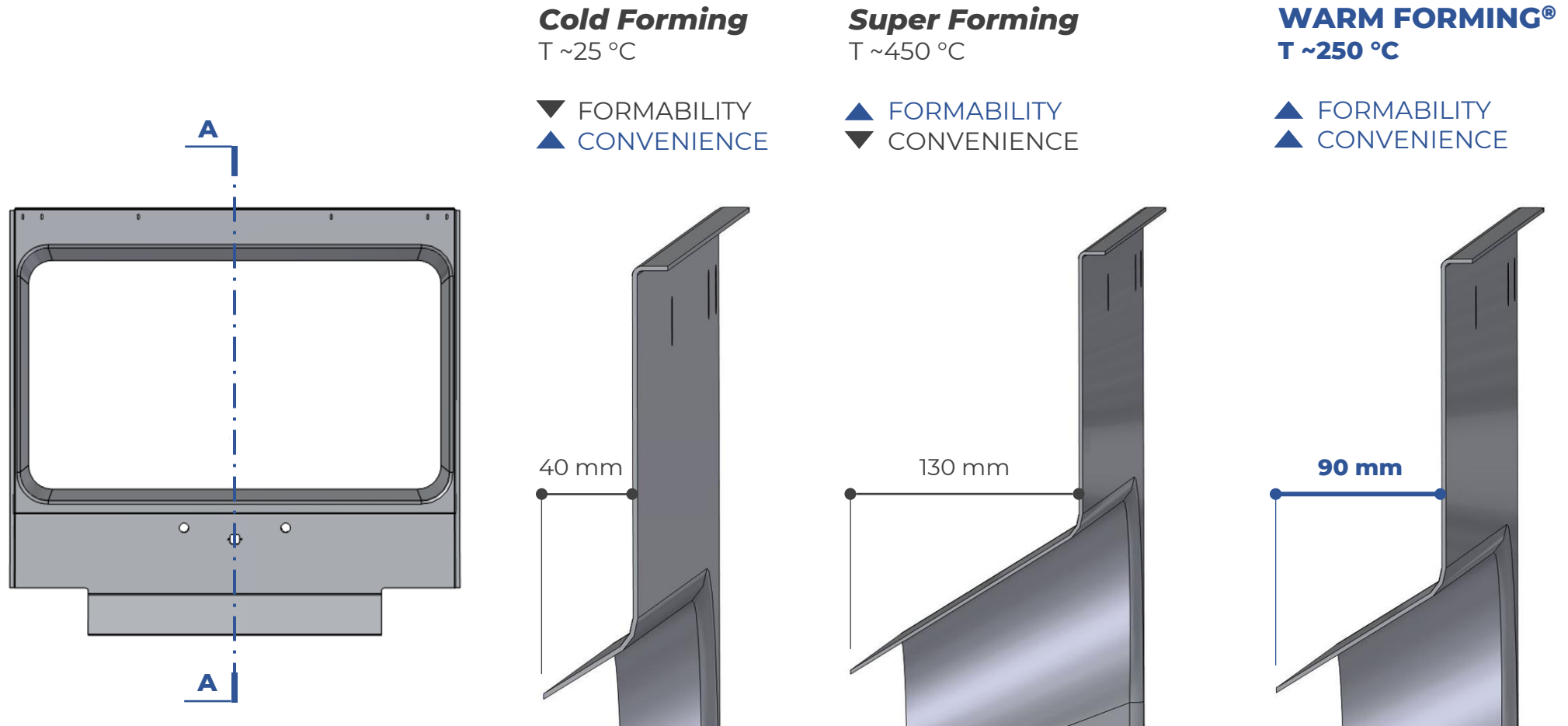
**gigant**

# THE OMER WARM FORMING®



# THE OMER **WARM FORMING**<sup>®</sup>

At OMER we have created a hybrid technology that combines **the costs of Cold Forming** and **the advantages of Super Forming** exclusive for the railway sector, called **WARM FORMING**<sup>®</sup>

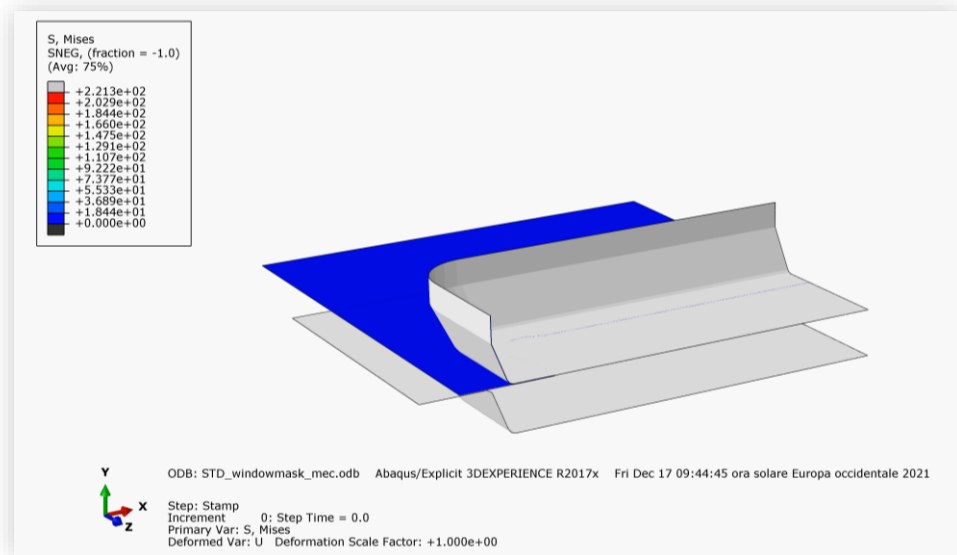


The **WARM FORMING**<sup>®</sup> process consists of forming aluminum sheets through a **localized and temperature-controlled heating** (~250 °C).

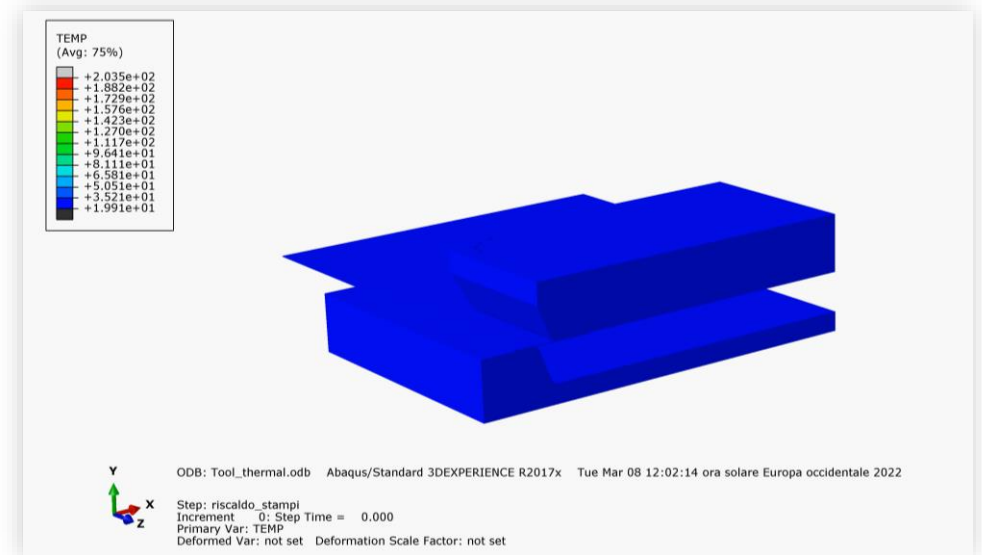
The operating temperature is defined according to *material, geometry and desired formability* and is kept constant during the process through a **feedback control system**.  
The feasibility of the process is analyzed through **numerical simulations**.

The analytical results are validated and verified with **experimental tests** for both the heating and forming phases.

FORMING SIMULATION



THERMAL PROCESS SIMULATION



# TOWARDS SUSTAINABILITY



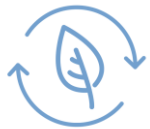
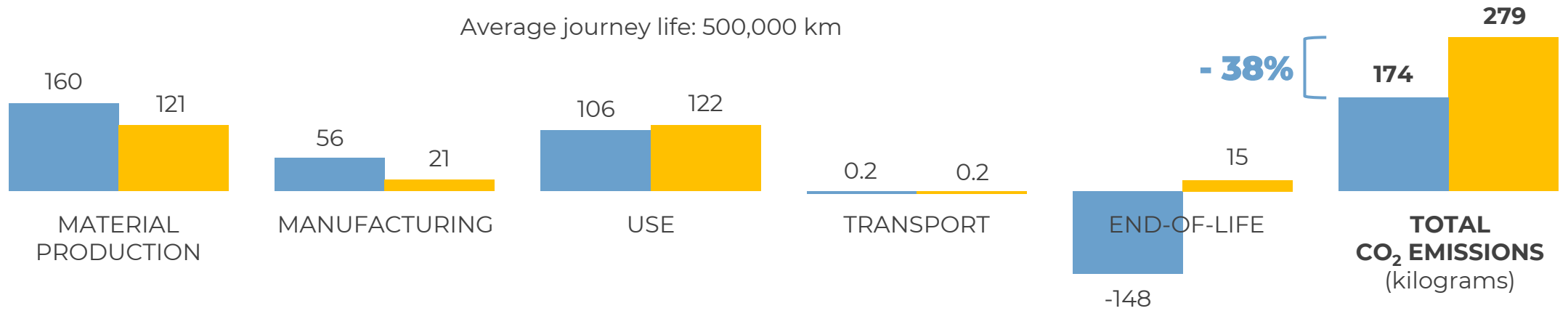
**An aluminum window panel  
reduces CO2 emissions by almost half\*  
and at the end of their life  
will be totally recycled  
with 95% energy saving\*\***

**\* compared to the same element made of fiberglass  
in an average journey life of 500,000 km**

**\*\* compared to production from scratch starting from bauxite**

# TOWARDS SUSTAINABILITY

As part of a collaboration with the Universities of Milwaukee and Palermo and an ESG project for OMER, a published case study compares the **life-cycle CO<sub>2</sub> emissions** of a high-speed window panel made in **Aluminum AA5754** (12 kg) or in **Fiberglass GFRP** (13.8 kg)



**It is estimated that an aluminum window panel reduces CO<sub>2</sub> emissions by 38% compared to the same element made of fiberglass.**

*Energy and CO<sub>2</sub> life cycle inventory issues for aluminum-based components: the case study of a high-speed train window panel*

Giuseppe Ingarao <sup>a</sup>, Yelin Deng <sup>b</sup>, Roberta Marino <sup>a</sup>, Rosa Di Lorenzo <sup>a</sup>, Andrea Lo Franco <sup>c</sup>

<sup>a</sup> Department of Chemical, Management, Computer Science and Mechanical Engineering, University of Palermo, Viale delle Scienze, 90128, Palermo, Italy

<sup>b</sup> Department of Mechanical Engineering, University of Wisconsin-Milwaukee, WI, United States

<sup>c</sup> OMER SRL, Italy



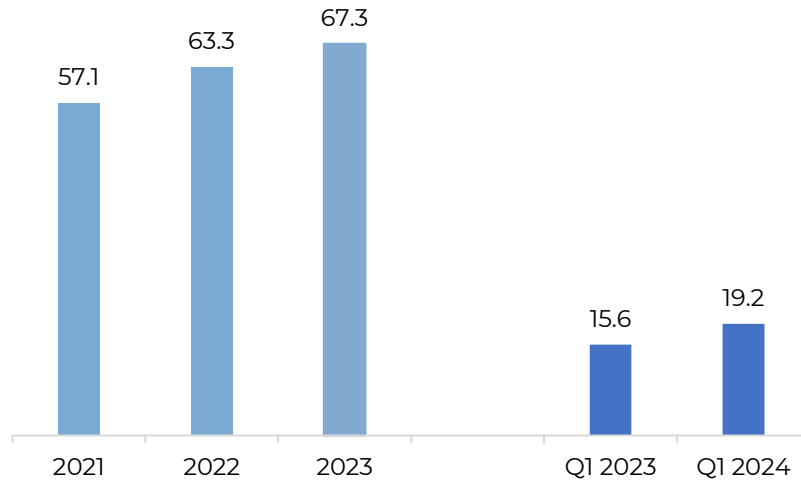
# KEY FINANCIALS

# KEY FINANCIALS

## POSITIVE GROWTH PICTURE CONFIRMING ...

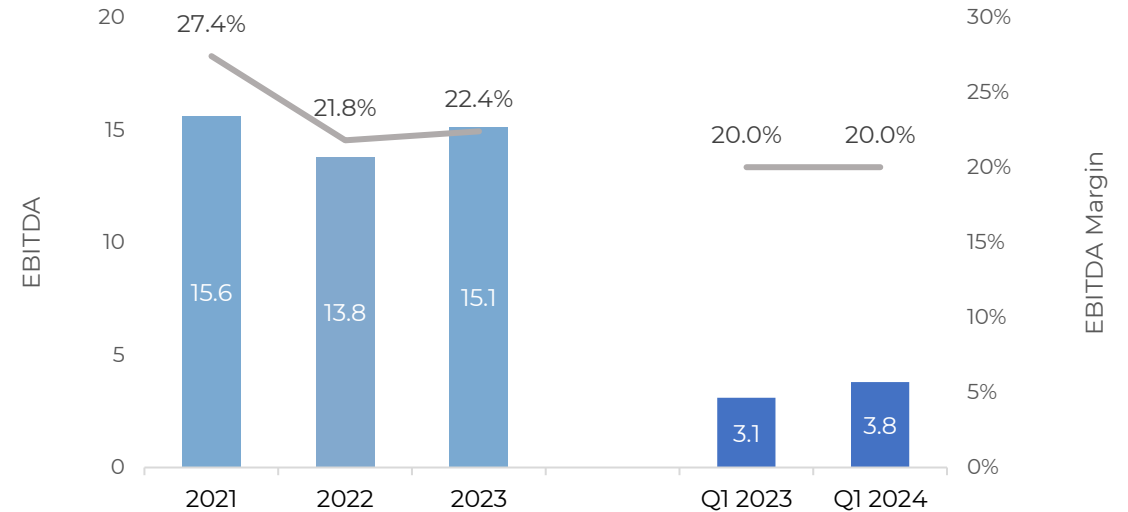
*Ever-increasing backlog supports strong rise in revenues and growing economies of scale to boost profitability*

**Group Total Revenues (€ mn)**



- Total Revenues at € 19.2 million, +23% YoY
- Growth driven by :
  - a significant increase in production volumes, to respond to the continuous growth in orders,
  - price revisions on some contracts to take into account inflation.

**Group EBITDA (€ mn)**



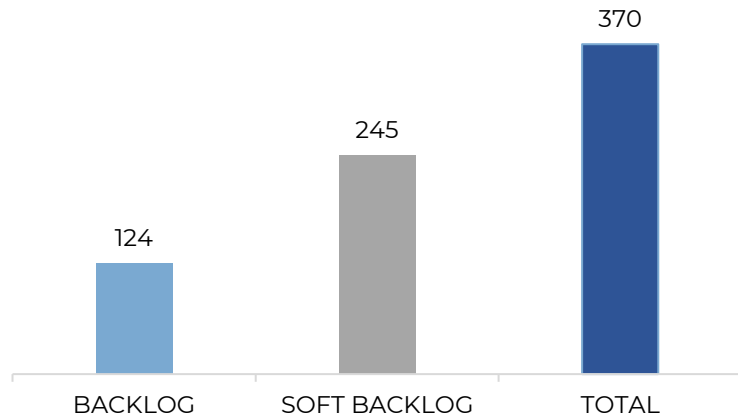
- EBITDA stands at € 3.8 million, up by 23% YoY, as results of:
  - slight decrease of costs of the main production factors (raw materials and energy),
  - price revisions on some contracts to take into account inflation,
  - increase in personnel costs, mainly due to the strengthening of the operating structure.
- The EBITDA Margin is equal to 20.0%, in line with Q1 2023.



# KEY FINANCIALS

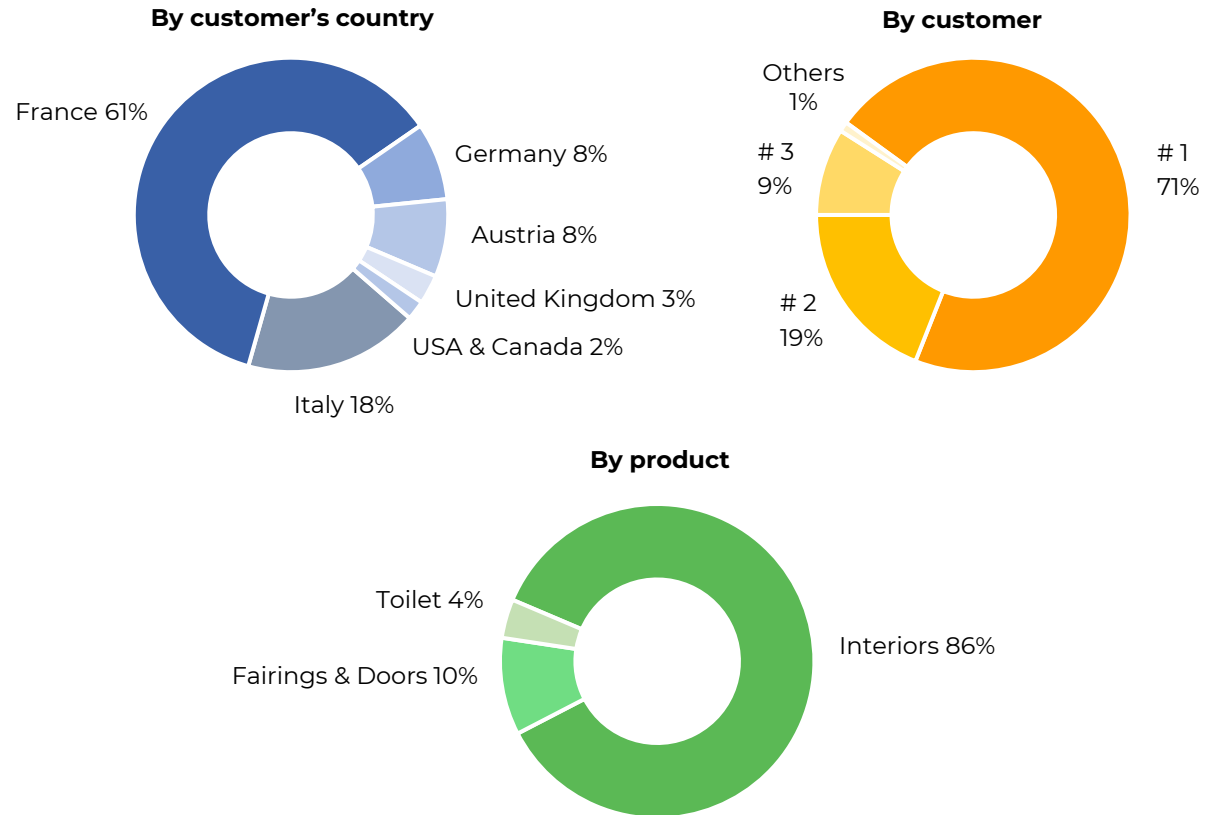
**... THE BACKLOG-BASED BUSINESS MODEL ENSURING EXCEPTIONAL VISIBILITY OF RESULTS**  
*€ 370 mn of backlog and soft backlog as at 31.03.2024 with a coverage ratio of 5.5 years – no inventory risk*

**Group Backlog (€ mn) as at 31.03.2024**



Coverage ratio <sup>1</sup>	5.5x
o/w backlog	1.8x
o/w soft backlog	3.6x

**Backlog + soft backlog breakdown as at 31.12.2023**



1) (Backlog + soft backlog) / Total revenues – at 31.12.2023

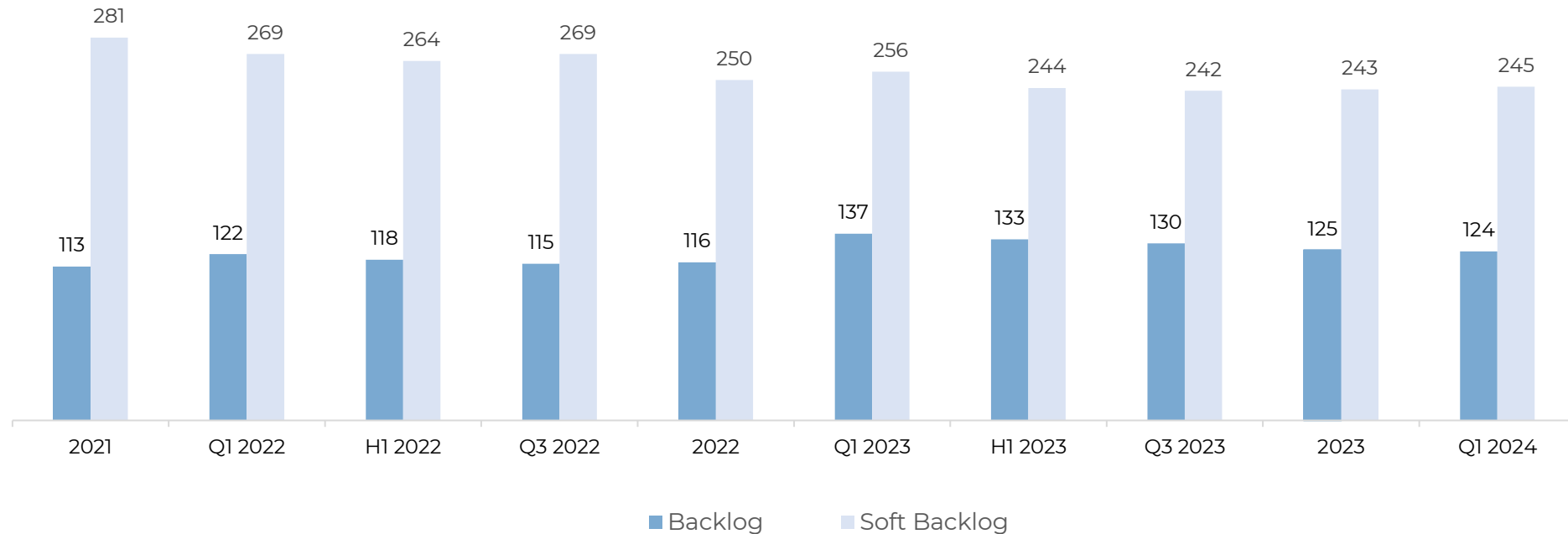
**Backlog** = signed production order received  
**Soft backlog** = signed framework agreement contract options, waiting for production order

# BACKLOG & SOFT BACKLOG TREND

**THE AMOUNT OF BACKLOG AND SOFT BACKLOG OVER YEARS SHOWS A STABLE TREND**

*Strong visibility of the future with a history of 100% conversion of soft backlog into backlog*

**Group Backlog & Soft Backlog (€ mn) Trend**



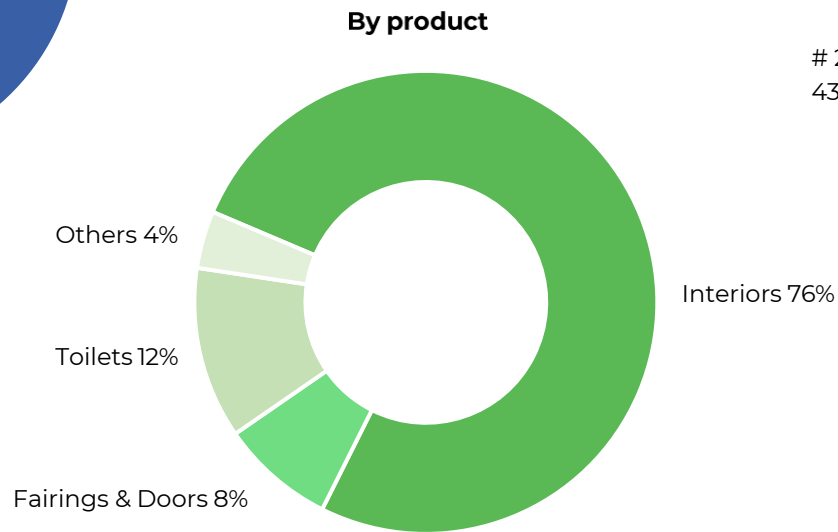
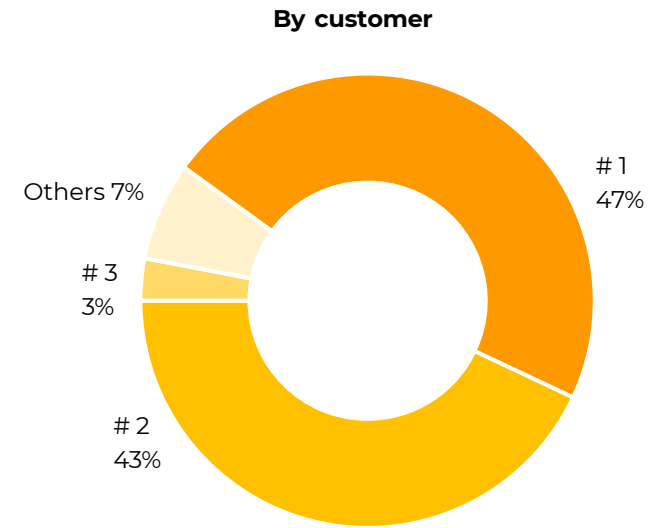
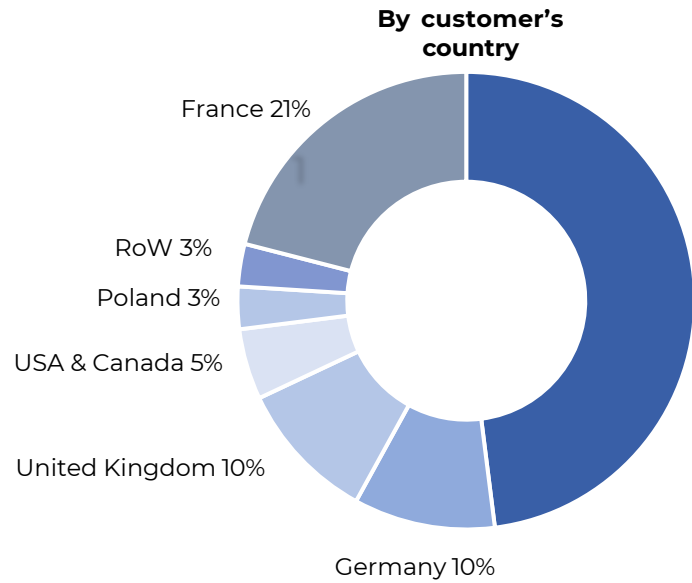
**Backlog** = signed production order received

**Soft backlog** = signed framework agreement contract options, waiting for production order

# KEY FINANCIALS

**DIVERSIFIED GEOGRAPHICAL BREAKDOWN, WHILE MAINTAINING MAJOR CUSTOMERS**  
*Strong customer concentration and consolidated product lines*

**Total revenues breakdown as at 31.12.2023**



# P&L STATEMENT

Growing volumes, increasing EBITDA margin and over 50% EBITDA conversion into net income

Values in thousands of euros	31.12.2023	31.12.2022
Revenues from sales	65,749	61,413
Other Income	1,534	1,859
<b>Total revenues</b>	<b>67,283</b>	<b>63,272</b>
Production costs	(23,710)	(23,557)
Cost of labor	(16,960)	(14,375)
Costs for services and miscellaneous <sup>3</sup>	(11,512)	(11,574)
<b>Total costs</b>	<b>(52,183)</b>	<b>(49,506)</b>
<b>EBITDA</b>	<b>15,100</b>	<b>13,765</b>
<i>Ebitda margin %</i>	<i>22.4%</i>	<i>21.8%</i>
Depreciation and Amortization	(2,977)	(2,478)
<b>EBIT</b>	<b>12,123</b>	<b>11,288</b>
<i>Ebit margin %</i>	<i>18.0%</i>	<i>17.8%</i>
Financial income and expenses	(682)	(198)
<b>EBT</b>	<b>11,441</b>	<b>11,089</b>
Income Taxes	(3,040)	(2,751)
<b>Net Profit</b>	<b>8,401</b>	<b>8,339</b>

The **Total Revenues** grew by about **6%** thanks to the increase of production volumes of projects currently in progress and price revisions on some contracts to take into account inflation.

**Production costs**, mainly relating to raw materials, are in line with 2022, due to a strong growth in the cost of raw materials in the first half of the year, followed by a slight reduction in the second half. **Cost of labor** recorded an increase because of the strengthening of the operating structure.

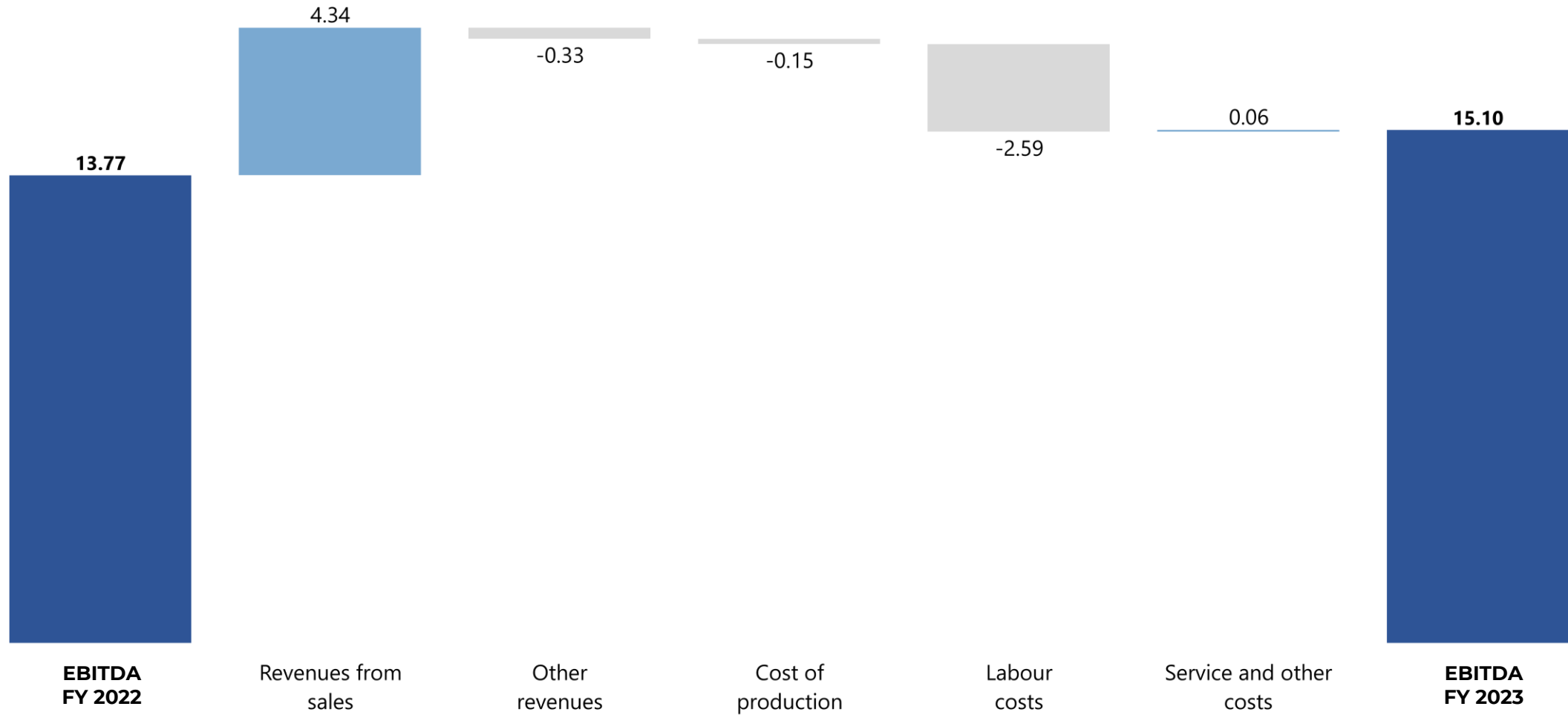
Consequently, **EBITDA** increased by **10%**, with an **EBITDA Margin rising** from about 21.8% to approximately **22.4%**.

**EBIT** stands at **€ 12.1 million**, accounting for 18.0% of revenues, an increase of **over 7%**.

**The operating profit** is in line with 2022, due to the increase in interest rates payable, equal to € 0.7 million, deriving from the factoring in place with some customers.

# EBITDA EVOLUTION FY 2022 – FY 2023

€/million



# BALANCE SHEET

## Solid balance sheet with low debt

Values in thousands of euros	31.12.2023	31.12.2022
Intangible assets	7,672	7,843
Tangible fixed assets	8,516	6,498
Financial Fixed assets	66	123
<b>Total fixed assets</b>	<b>16,254</b>	<b>14,464</b>
Inventories and advance payments	15,859	17,979
Trade receivables	17,860	15,524
Receivables for factoring operations	1,386	2,506
Other current assets	2,674	2,784
Trade payables	(12,175)	(8,807)
Other current liabilities	(5,933)	(5,084)
Severance indemnity fund	(328)	(325)
Provisions for risks and charges	(107)	(49)
<b>Net Working capital</b>	<b>19,236</b>	<b>24,528</b>
Share capital	5,750	5,750
Reserves & retained earnings	41,154	34,492
Net Profit	8,401	8,339
<b>Total equity</b>	<b>55,305</b>	<b>48,581</b>
Other M/L financial payables	(173)	(362)
Other short-term financial payables	(271)	(292)
M/L bank loans	(1,075)	(2,257)
Short-term bank loans	(1,179)	(1,277)
Non-fixed financial assets	4,992	-
Cash and cash equivalents	17,520	13,778
<b>Net Financial Position</b>	<b>19,815</b>	<b>9,589</b>

**Total Fixed Assets** increased from € 14.5 million to € 16.3 million. The **intangible assets** include the values of the improvements made to the so-called Plant B.

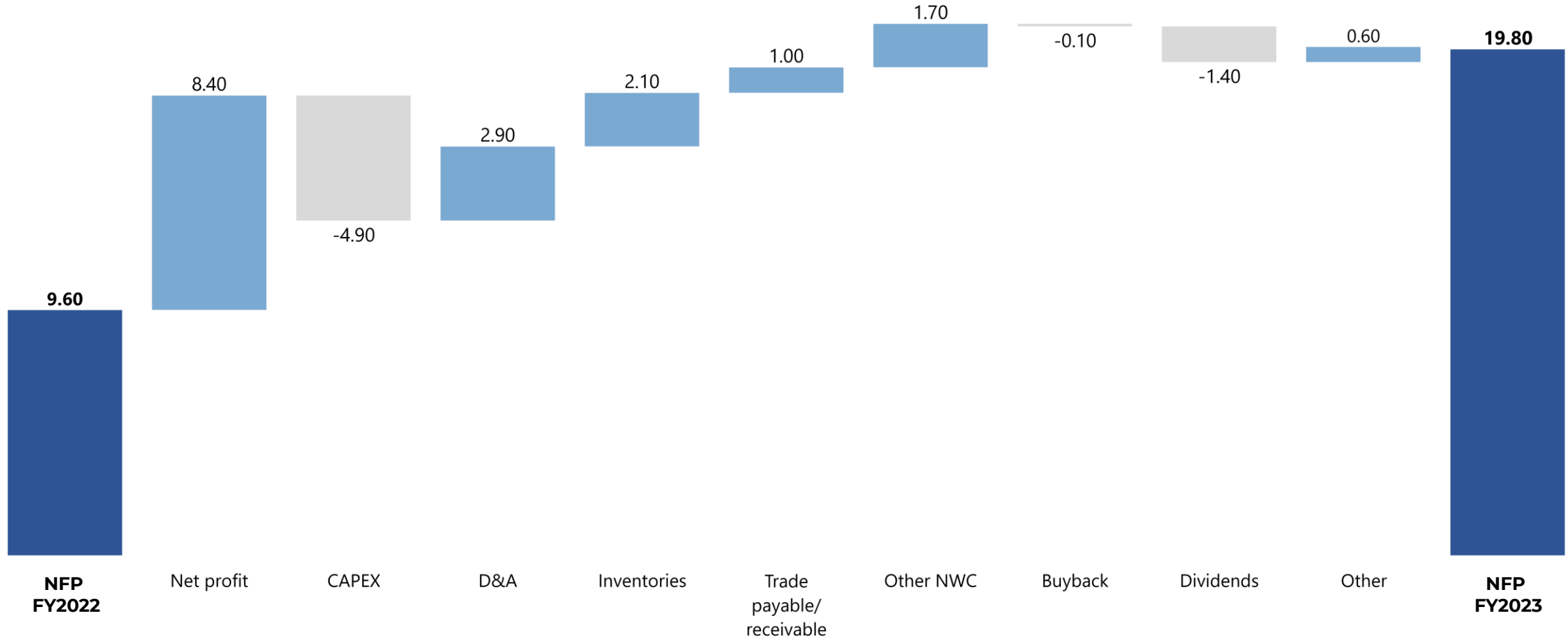
The variation of **Net Working Capital** is related to a reduction of the **Warehouse stock and finished products** of € 2.1 million and to the increase of **Commercial debts and other debts** related to taxes for an amount about € 4.2 million.

The **Receivables for factoring operations**, equal to **€ 1.4 million**, show the balance of the position relating to the “non-recourse factoring with maturity” operation held with Unicredit.

The **Consolidated Net Financial Position** was positive (cash) and equal to **19.8 million** compared to a positive Consolidated Net Financial Position as of 31st December 2022 equal to € 9.6 million.

# NFP EVOLUTION FY2022 – FY 2023

€/million



# CASH FLOW STATEMENT

## Strong cash generation from operating activities

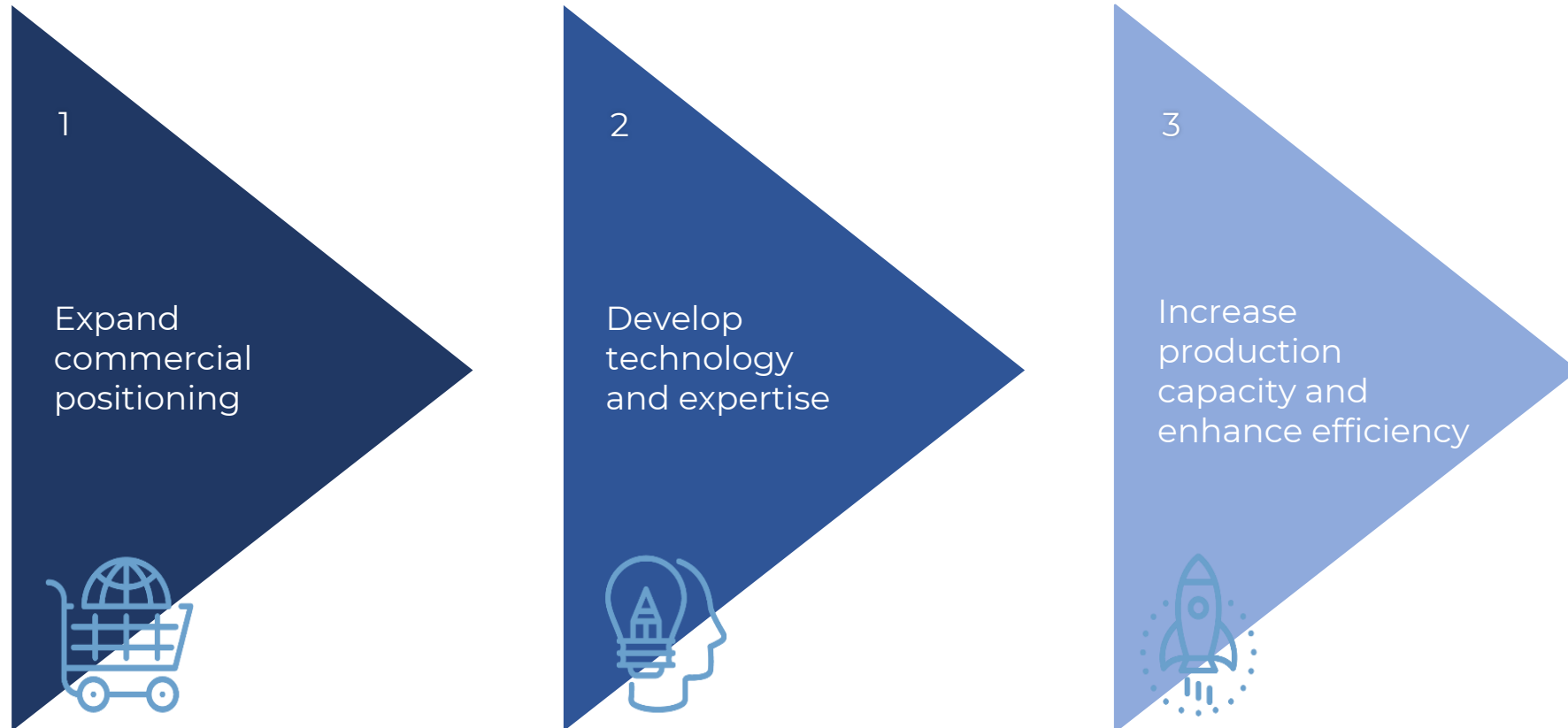
Values in thousands of euros	31.12.2023	31.12.2022
Profit/Loss for the year	8,401	8,339
Income taxes for the year	3,040	2,751
Depreciation	2,897	2,413
Interest and other non-monetary changes	595	313
<b>Financial flow before changes in the NWC</b>	<b>14,933</b>	<b>13,816</b>
Changes in working capital	4,502	(15,833)
Paid income taxes	(2,353)	(3,166)
Other variations	(563)	(104)
<b>Cash flow from operating activities</b>	<b>16,520</b>	<b>(5,288)</b>
<b>Net cash flow from investing activities</b>	<b>(4,934)</b>	<b>(3,963)</b>
<b>Change in non-fixed financial assets</b>	<b>(4,992)</b>	-
Change in short and m/l term financing activity	(1,289)	(2,114)
Payment of dividends	(1,432)	-
Purchase of treasury shares	(131)	(173)
<b>Cash flow from financing activities</b>	<b>(2,852)</b>	<b>(2,287)</b>
<b>Total financial flows</b>	<b>3,742</b>	<b>(11,537)</b>
Initial cash and cash equivalents	13,778	25,315
<b>Final cash and cash equivalents</b>	<b>17,520</b>	<b>13,778</b>



A high-speed train, likely an Amtrak Acela, is shown in motion on a track. The train is white with blue and red accents. The word 'acela' is visible on the side of the train. The background is blurred, suggesting speed. The sun is visible in the distance, creating a bright glow.

# STRATEGY

A CLEAR LONG-TERM VISION TO DRIVE FUTURE GROWTH





## Develop commercial presence in USA

OMER North America operates with one client and has three initial relationships in place (IFE, Siemens and Stadler)



## Develop commercial penetration

Increase commercial penetration towards Stadler, Siemens and CAF



2

Develop  
technology  
and expertise



### **Develop of recently introduced/brand new products**

Develop of new products from scratch (i.e. seats) and increase competences in toilet system



### **Expand the range of products**

Expand the range of products by entering new market segments with high added value

(Letter of intent signed with Arsenale Express S.p.A. in the luxury hospitality)

**The expansion of Omer commercial positioning in Europe and USA and the development of technology and expertise could be achieved through both organic growth and M&A operations.**



**MATS**

Modular Aluminium Toilet System



3

Increase production capacity and enhance efficiency



## **Bring the new Carini World Class Factory up to optimal economic performance**

in order to meet capacity levels demanded by clients in Europe (scale, automation, industry 4.0)



## **Introduction of new automated, digitized and robotic processes**



# KEY TAKEAWAYS



A LEADING PLAYER IN THE PRODUCTION OF ALUMINIUM ALLOY TRAIN INTERIORS THANKS TO **SUPERIOR KNOW-HOW AND INTEGRATED BUSINESS MODEL**



**STATE-OF-THE-ART PRODUCTION FACILITIES** GRANTING LARGE CAPACITY AND SIGNIFICANT PRODUCTIVITY GAINS



A KEY PARTNER FOR LEADING MANUFACTURERS OF ROLLING STOCK WORLDWIDE, **AN INDUSTRY FEATURING SIGNIFICANT BARRIERS TO ENTRY**



**ATTRACTIVE MARKET WITH LONG-TERM GROWTH POTENTIAL** THANKS TO INVESTMENTS IN SUSTAINABLE MOBILITY, CONNECTIVITY AND TRANSFER OF TRAFFIC FROM ROAD TO RAIL



BACKLOG-BASED BUSINESS MODEL ENSURING EXCEPTIONAL VISIBILITY ON RESULTS, COMBINED WITH A **STRONG TREND IN GROWTH FOR REVENUES AND PROFITABILITY**

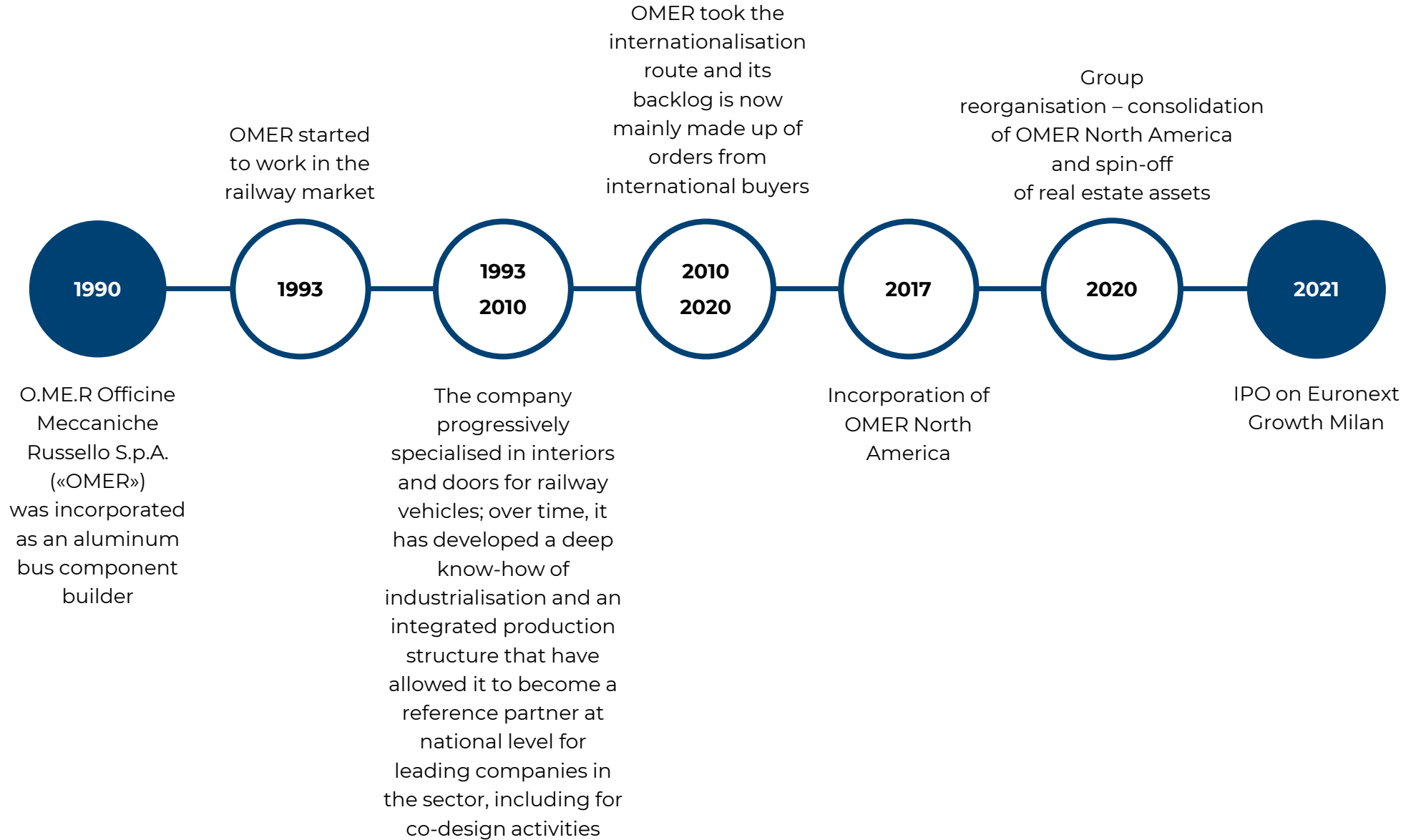


**HIGHLY EXPERIENCED MANAGEMENT TEAM**



APPENDIX






# HISTORY










# CORPORATE GOVERNANCE & SHARES' DATA

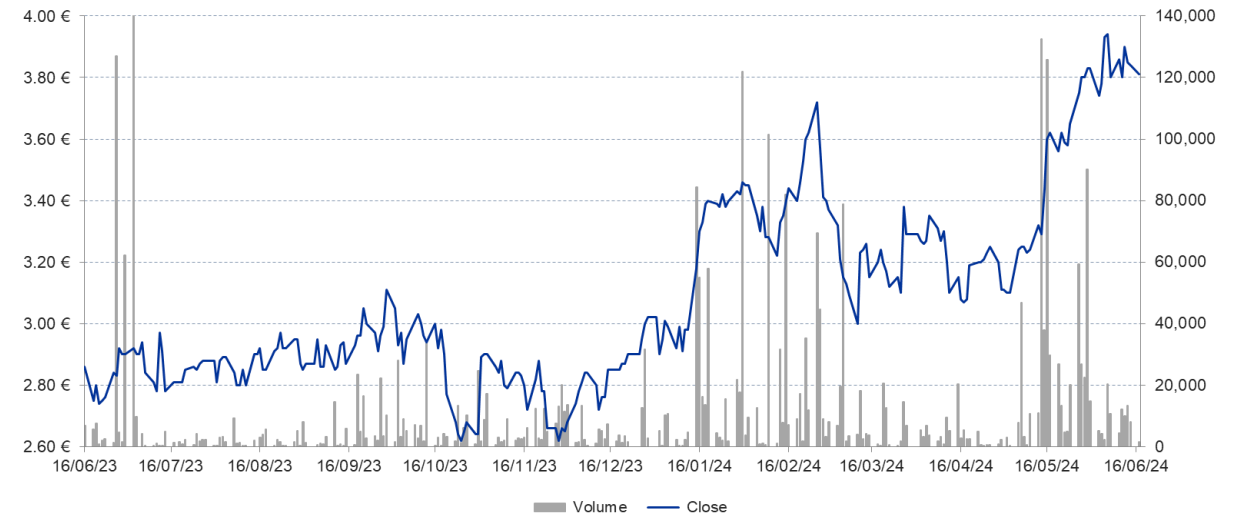
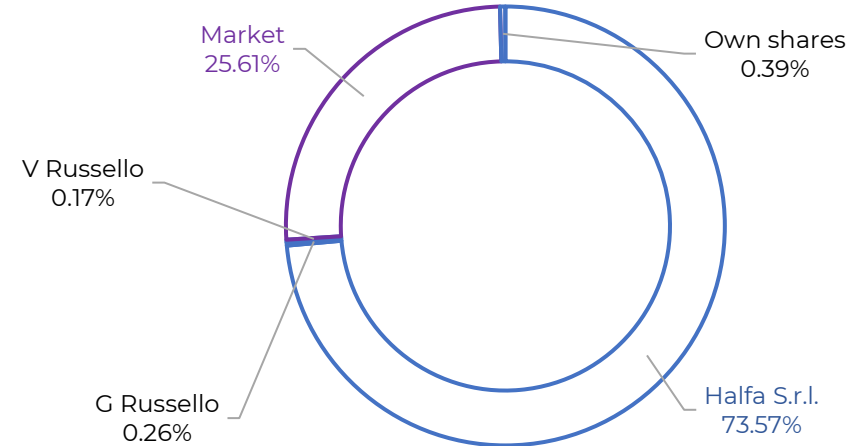
## BOARD OF DIRECTORS

-  Giuseppe Russello \_ Chairman & CEO
-  Vincenza Russello – Deputy Chairman
-  Salvatore Giosuè – Director & CFO
-  Roberto Polizzi – Non-Executive Director
-  Angelo Costa – Independent Director

## BOARD OF STATUTORY AUDITORS

-  Fabrizio Escheri – Chairman
-  Antonina Parrotta – Regular Statutory Auditor
-  Marco Sposito – Regular Statutory Auditor
-  Massimo De Benedictis – Deputy Statutory Auditor
-  Antonio Imburgia – Deputy Statutory Auditor

## Shareholders



IPO Date	Issue Price	Closing Pr. at 16 June 24	Mkt. Cap. at 16 June 24
04 Aug 21	3.40 €	3.81 €	≈110 € mn

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**FORWARD TO THE FUTURE**

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