

Smart Parking Limited (ASX:SPZ)

# H1 FY26 Results

17 February 2026  
CEO Paul Gillespie

[smartparking.com](http://smartparking.com)

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# H1 FY26 Highlights - Record Results



Revenue of \$62.6m<sup>1,2</sup>

up

**96%**

\* Compared to PCP

Adjusted EBITDA

\$15.6m<sup>2,3</sup> up

**85%**

\* Compared to PCP

UNPATA<sup>6</sup> of \$6.5m up

**163%**

\* Compared to PCP

Adjusted free cash flow  
of \$10.4m<sup>5</sup> up

**89%**

\* Compared to PCP

Cash of \$15.3m<sup>4</sup> up

**21%**

\* Compared to 30 June 2025

Peak Parking exceeding  
expectations, EPS accretion of

**> 30%**

1 Excludes interest income of \$0.1m.

2 Includes 6 months of Peak Parking (USA).

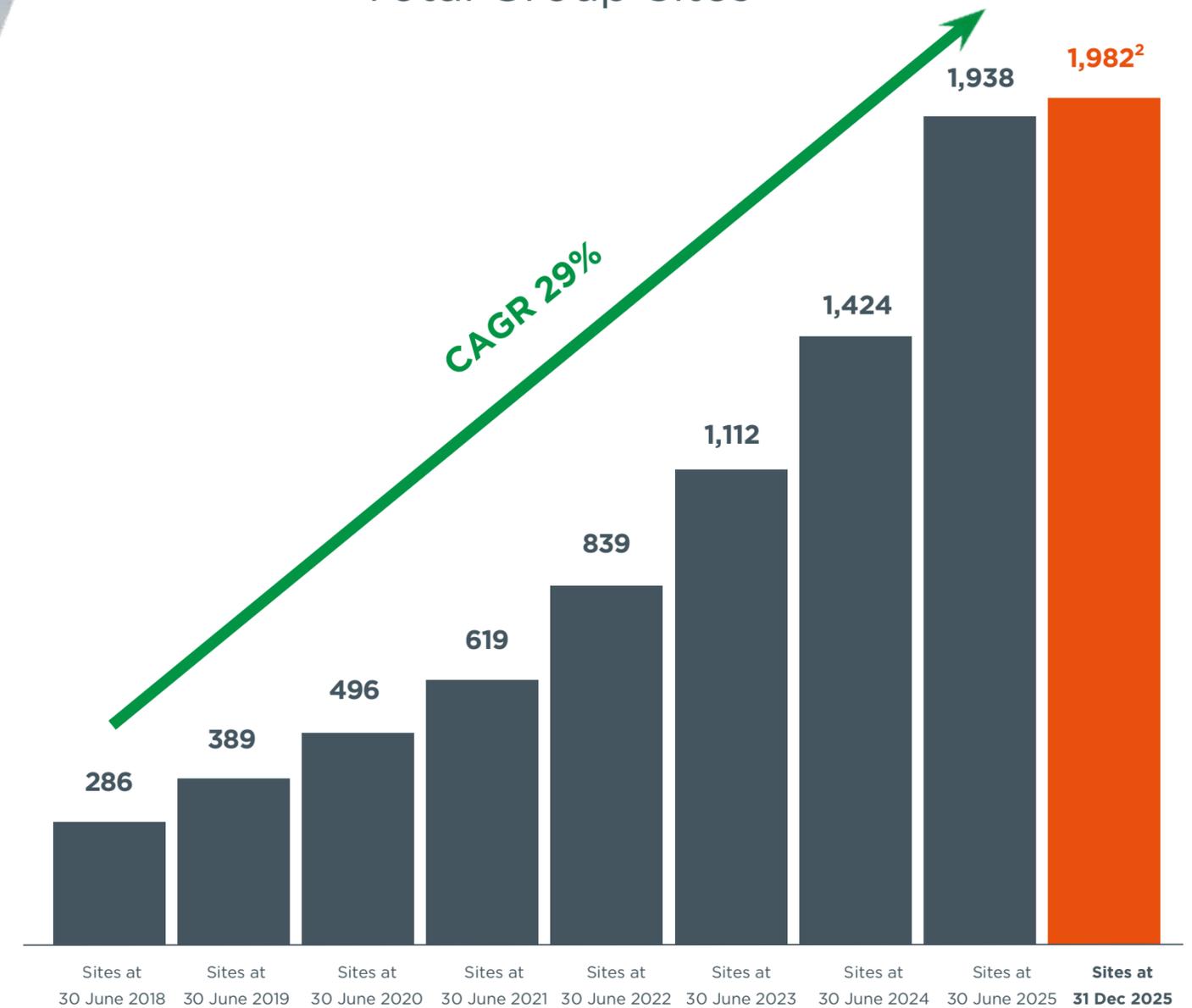
3 Excludes non-recurring/non-operation costs.

4 Excludes \$10.2m of cash held on behalf of customers.

5 Excludes Switzerland cash flow and exceptional items.

6 UNPATA is calculated as underlying net profit after tax before the after-tax impact of amortisation of customer relationships from acquisition, non-recurring/non-operating items, foreign exchange gains/losses, and includes the normalisation of the prior year tax expense. UNPATA is a non-IFRS financial measure.

## Total Group Sites



<sup>2</sup> Includes the removal of 71 sites in Queensland in H1 FY26. Equipment redeployed to New Zealand.

## CEO Observations

- Disciplined execution of strategy delivers continued growth. Revenue up 96%, Adjusted EBITDA up 85%, Basic EPS (UNPATA)<sup>1</sup> up 121% and UNPATA<sup>1</sup> up 163% on PCP.
- USA acquisition exceeding expectations, delivering greater than 30% EPS accretion and triggering full earn-out. Growth strategy underway with new sites and expansion to new states.
- Ongoing organic sales activity with 200 new ANPR site additions in UK, NZ, Denmark, Germany and the USA.
- UK revenue up 64%, Adjusted EBITDA up 46%. UK sites increased 17% to 1,397; total issuance impacted by local cost-of-living pressures. Improvement measures underway.
- Adjusted free cash flow and cash balance up 89% and 21% respectively, fuelling a self-funded organic growth strategy.

<sup>1</sup> Refer to Group P&L on page 8 for definitions of Basic EPS (UNPATA) and UNPATA.

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# Regional Review - H1 FY26



| Leveraging core technology and capability in existing and new territories



**UK**

Optimising Yield



**NZ**

Building Scale, Expanding Margin



**Germany**

Growth Accelerating, Positive EBITDA January 2026



**Denmark**

Scaling Manual Operations



**USA**

New ANPR Sites Accelerating

**NEW**



**Switzerland**

**H1 FY26 Results**

**GROWTH IN SITES**

1,397 total sites  
17%<sup>1</sup> up on PCP

260 total sites  
28%<sup>1</sup> up on PCP

125 total sites  
74%<sup>1</sup> up on PCP

63 total sites  
200%<sup>1</sup> up on PCP

137 total sites<sup>2</sup>

**GROWTH IN PBNs**

0%

Up 39%<sup>1</sup>

Up 38%<sup>1</sup>

Down 45%<sup>1,3</sup>

4,011 PBNs issued

**REVENUE (\$000s)**

41,630  
Up 64%<sup>1</sup>

4,216  
Up 23%<sup>1</sup>

2,597  
Up 30%<sup>1</sup>

110  
Down 59%<sup>1,3</sup>

13,481

**ADJUSTED EBITDA (\$000)**

12,196  
Up 46%<sup>1</sup>

1,875  
Up 35%<sup>1</sup>

(513)  
Down 3%<sup>1</sup>

(1,488)  
Down 60%<sup>1,3</sup>

4,046

**Adjusted EBITDA Margin**

29.3%  
Down 3.7%<sup>1</sup>

44.5%  
Up 3.8%<sup>1</sup>

(19.8%)  
Up 5.2%<sup>1</sup>

N/M

30.0%

**TAM**

45,000 sites

3,000 sites

90,000 sites

10,000 sites

2bn parking spaces

- Accelerating market entry
- Established the business in July 2025
- Managing Director, sales & operations team recruited
- Operational structure set up complete
- First contract won in December 2025.

<sup>1</sup> Compared to the previous corresponding period.

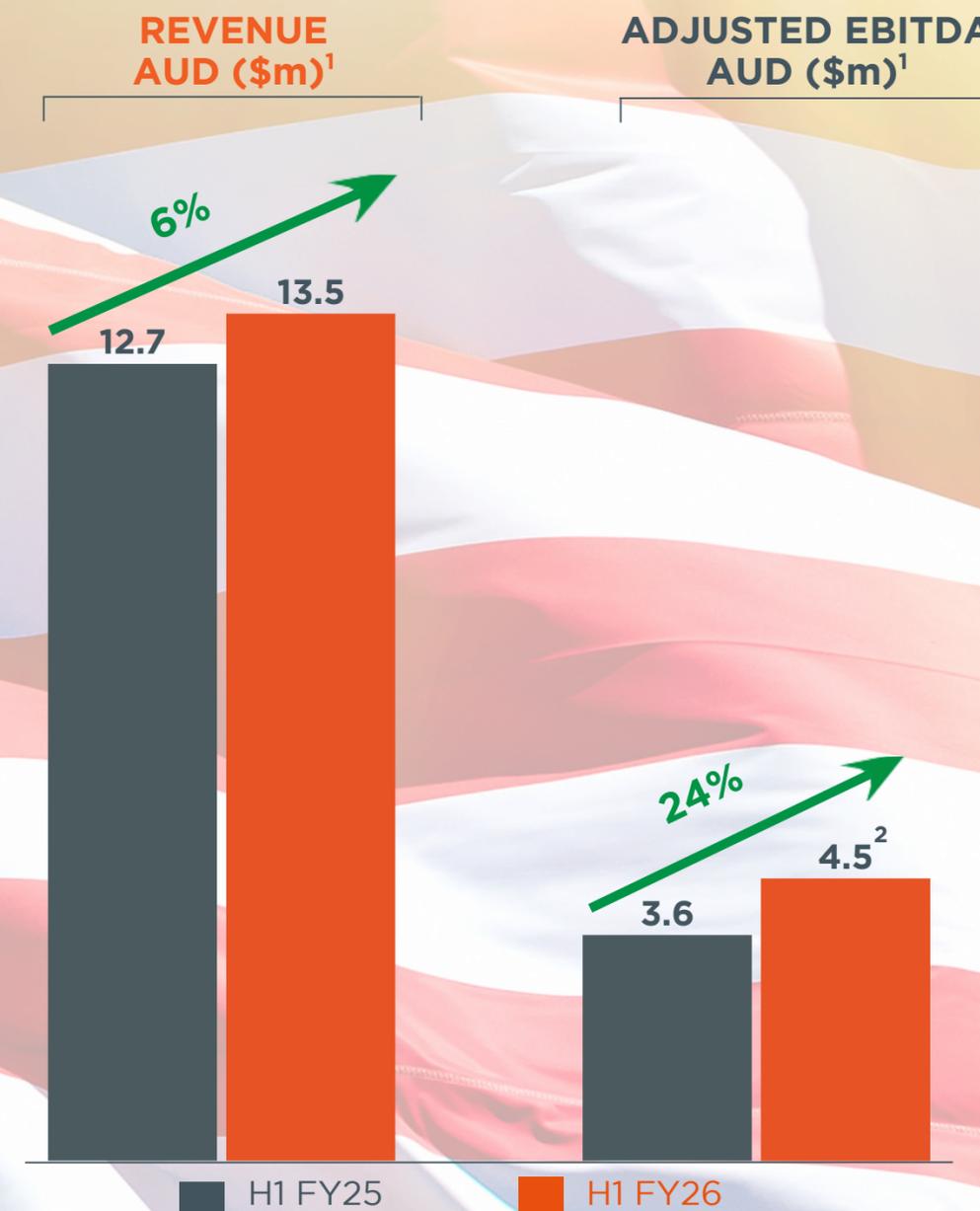
<sup>2</sup> Includes 7 ANPR sites at 31 December 2025.

<sup>3</sup> Denmark switched to manual operations from 1 July 2025, resulting in lower issuance and higher costs.

# Peak Parking

## | USA Investment Case Delivered

- ✓ Achieved earnout target and exceeded investment case.
- ✓ On track to exceed 30% accretion, overachieving the 25% accretion that was outlined in the Acquisition & Equity Raising presentation.
- ✓ Integration into the Smart Parking Group is complete.
- ✓ ANPR technology rollout underway with 13 live ANPR sites as of 17 February 2026.
- ✓ 6% increase in revenue and 12% improvement in Adjusted EBITDA, on PCP. Excluding Group-related charges, the Adjusted EBITDA is up 24% on PCP.
- ✓ USA expansion aligned with SPZ strategy of large organic growth opportunities, expansion into new States and further M&A activity available across all States.



<sup>1</sup> H1 FY25 results are unaudited and post conversion to IFRS.  
<sup>2</sup> Excludes \$0.4m of Group-related charges post acquisition.

# H1 FY26 Business Update

| Record results, expanding market opportunities to accelerate growth.



## FINANCIAL

- **Record results** – Revenue \$62.6m<sup>1</sup> up 96% on PCP, and Adjusted EBITDA \$15.6m<sup>2</sup> up 85% on PCP.
- Strong H1 FY26 with contributions from all regions, with revenue growth compared to PCP of: UK: 64%, NZ: 23%, GE: 30%.
- Record free cashflow of **\$10.4m up 89%** on PCP.
- **Cash of \$15.3m<sup>3</sup>.**
- USA acquisition exceeding expectations, delivered >30% EPS accretion and triggering full earn-out.

## EXPANSION

- **1,982 total sites** (comprising 1,852 ANPR sites and 130 USA sites) under management as at 31 December 2025.
- USA acquisition is performing well, growth strategy underway with new ANPR sites and expansion to new States.
- Focused on accelerated growth across all territories with key enterprise contract wins as the sales team gains traction.
- Continuing to enhance UK debt resolution processes, driving higher yields and delivering greater returns for every breach.

## OUTLOOK

- **Positive outlook for profitable growth in FY26** - long-term organic site target of 3,000 sites under management by December 2028, reaffirmed.
- **Full-year contribution** in FY26 from Peak Parking (USA).
- Margin expansion from technology implementation in the North American market, as the ANPR rollout continues.
- Sales execution in H2 FY26 will deliver an uplift in sites under management across all operating territories.
- Continuing to leverage proprietary market-leading technology and deep domain expertise.
- Scope for further accretive acquisitions aligning with SPZ's disciplined selection criteria.

<sup>1</sup> Excludes interest income of \$0.1m.

<sup>2</sup> Excludes non-operating/non-recurring items and foreign exchange losses.

<sup>3</sup> Excludes cash held on behalf of clients.

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# H1 FY26 Financial Update



# H1 FY26 Results

## | Adjusted EBITDA increase of 85% from PCP

\$m's	H1 FY26	H1 FY25	H1 FY26 vs H1 FY25
<b>Revenue (excluding interest revenue)</b>	<b>62.6</b>	31.9	96%
Cost of sales	(28.1)	(10.2)	175%
Gross profit	34.5	21.7	59%
Overheads	(18.9)	(13.3)	42%
<b>Adjusted EBITDA<sup>1</sup></b>	<b>15.6</b>	8.4	85%
Foreign exchange gains/(losses)	(1.1)	0.8	(238%)
EBITDA	14.5	9.2	58%
Depreciation and amortisation (excluding intangibles from acquisitions)	(5.3)	(3.8)	39%
Amortisation of intangibles from acquisitions	(1.2)	(0.5)	140%
Loss on disposal of assets	(0.1)	(0.1)	0%
EBIT	7.9	4.8	65%
Net interest	(0.8)	(0.2)	300%
Net profit	7.1	4.6	54%
Tax expense	(2.8)	(0.7)	300%
<b>Net profit after tax</b>	<b>4.3</b>	3.9	10%
<b>UNPATA<sup>2</sup></b>	<b>6.5</b>	2.5	163%
Gross Margin %	55.1%	68.0%	
Overheads/Revenue %	30.2%	41.7%	
Adjusted EBITDA Margin %	24.9%	26.3%	
<b>Basic EPS (cents per share)</b>	<b>1.03</b>	1.12	(8%)
<b>Basic EPS (UNPATA)<sup>3</sup> (cents per share)</b>	<b>1.56</b>	0.71	121%

<sup>1</sup> The balances are adjusted for amounts that are not related to underlying operations or not expected to occur in the future.

<sup>2</sup> UNPATA is calculated as underlying net profit after tax before the after-tax impact of amortisation of customer relationships from acquisition, non-recurring/non-operating items, foreign exchange gains/losses, and includes the normalisation of tax expense. UNPATA is a non-IFRS financial measure.

<sup>3</sup> Basic EPSA (UNPATA) is calculated as UNPATA over the weighted number of ordinary shares outstanding during the year. Basic EPSA (UNPATA) is a non-IFRS financial measure designed to measure underlying performance.

UNPATA<sup>2</sup> of \$6.5m, up 163% on PCP. UNPATA is calculated as underlying net profit after tax before the after-tax impact of amortisation of customer relationships from acquisition, non-recurring/non-operating items, foreign exchange gains/losses, and includes the normalisation of tax expense.

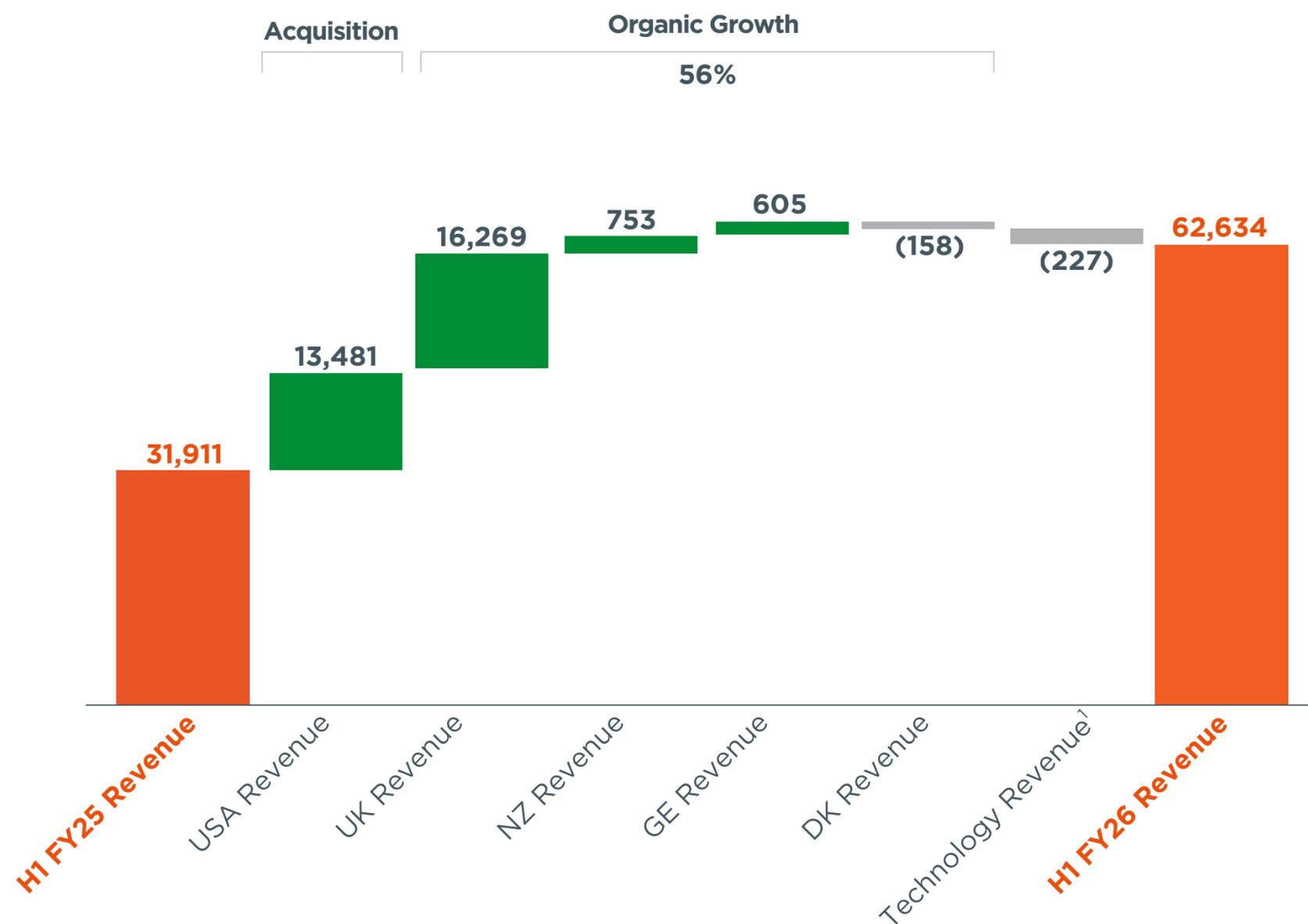
Revenue increased 96% due to the organic expansion of ANPR sites under management by 19% from PCP, the acquisition of Peak Parking, and significant revenue growth in the UK due to enhancements to the debt resolution process.

Adjusted EBITDA of \$15.6m (includes 6 months Peak Parking (USA)) is up 85% on H1 FY25. Adjusted EBIT of \$9m, up 121% on H1 FY25.

# Revenue Growth

| Revenue up 96% from increased sites under management and expansion into new territories and acquisitions

(\$000s)



<sup>1</sup> Relates to the technology segment of the Group that is in the process of being phased out.

Sustained organic growth delivering a 96% increase, with significant runway ahead.

Group average revenue per ticket up 44% from PCP largely due to enhanced debt resolution processes in the UK.

Revenue includes \$13.5m from Peak Parking (USA) acquired in February 2025, up 6% on pre-acquisition PCP.

New Zealand parking management revenue growth of 23% compared to PCP.

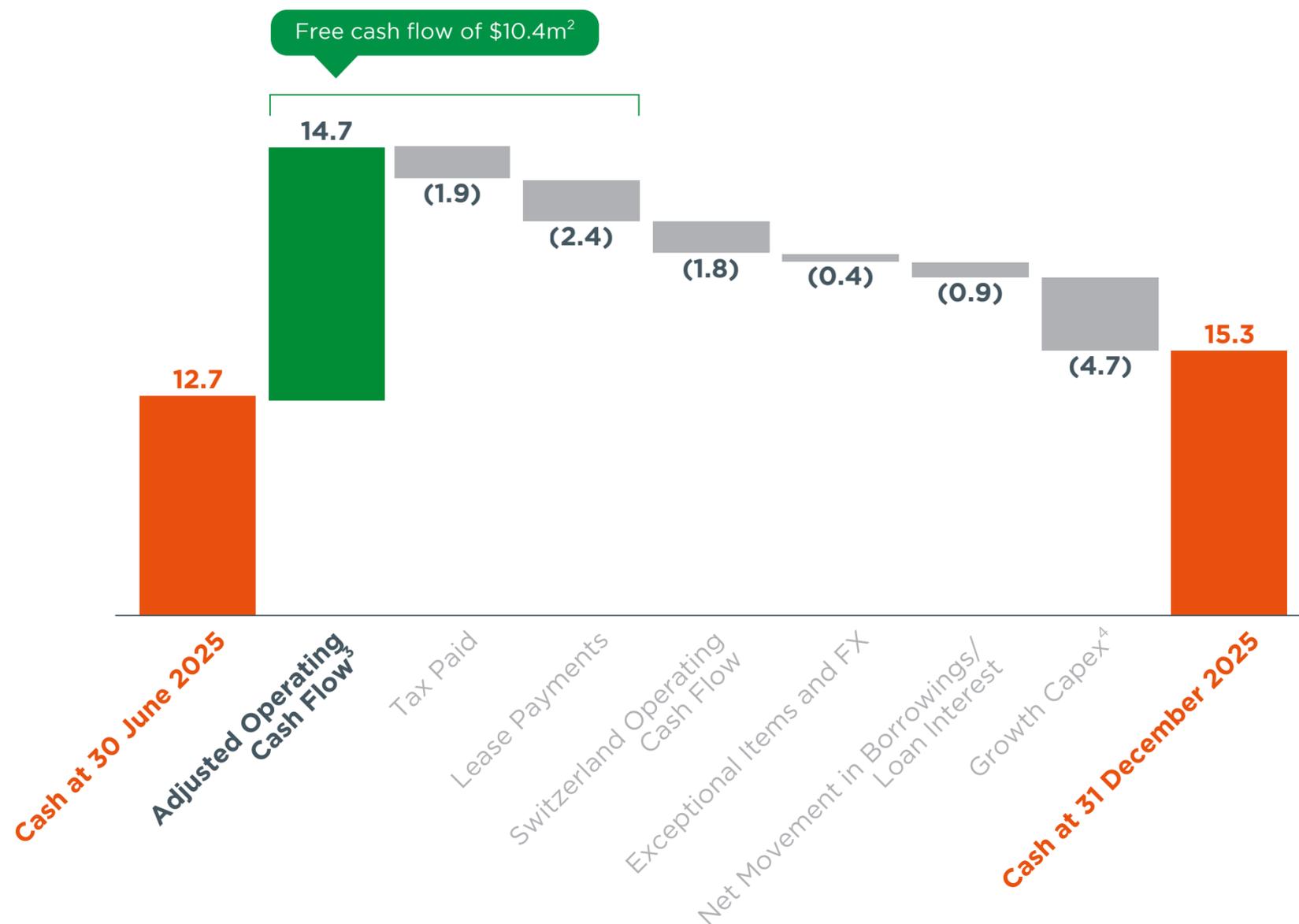
German parking management revenue growth of 30% compared to PCP.

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# Positive Free Cash Flow

| Cash increases to \$15.3m<sup>1</sup> whilst funding growth investments

Cash Flow Waterfall (\$m)



<sup>1</sup> Excludes cash held on behalf of customers of \$10.2m.

<sup>2</sup> Excludes Switzerland cash flow and exceptional items to enable like-for-like comparison with PCP. CAPEX and payments for intangible assets are not included in free cash flow as relates to future growth.

<sup>3</sup> Excludes tax paid, exceptional items and Switzerland cash flow as shown separately.

<sup>4</sup> Includes CAPEX and payments for intangible assets.

Invested in growth and expansion in new territories whilst increasing profitability and improving the year end cash balance.

Cash on hand of \$15.3m as at 31 December 2025 - excludes cash held on behalf of customers of \$10.2m.

Adjusted free cashflow of \$10.4m, up 89% on PCP.

Growth capex supports expansion in sites and technology development.

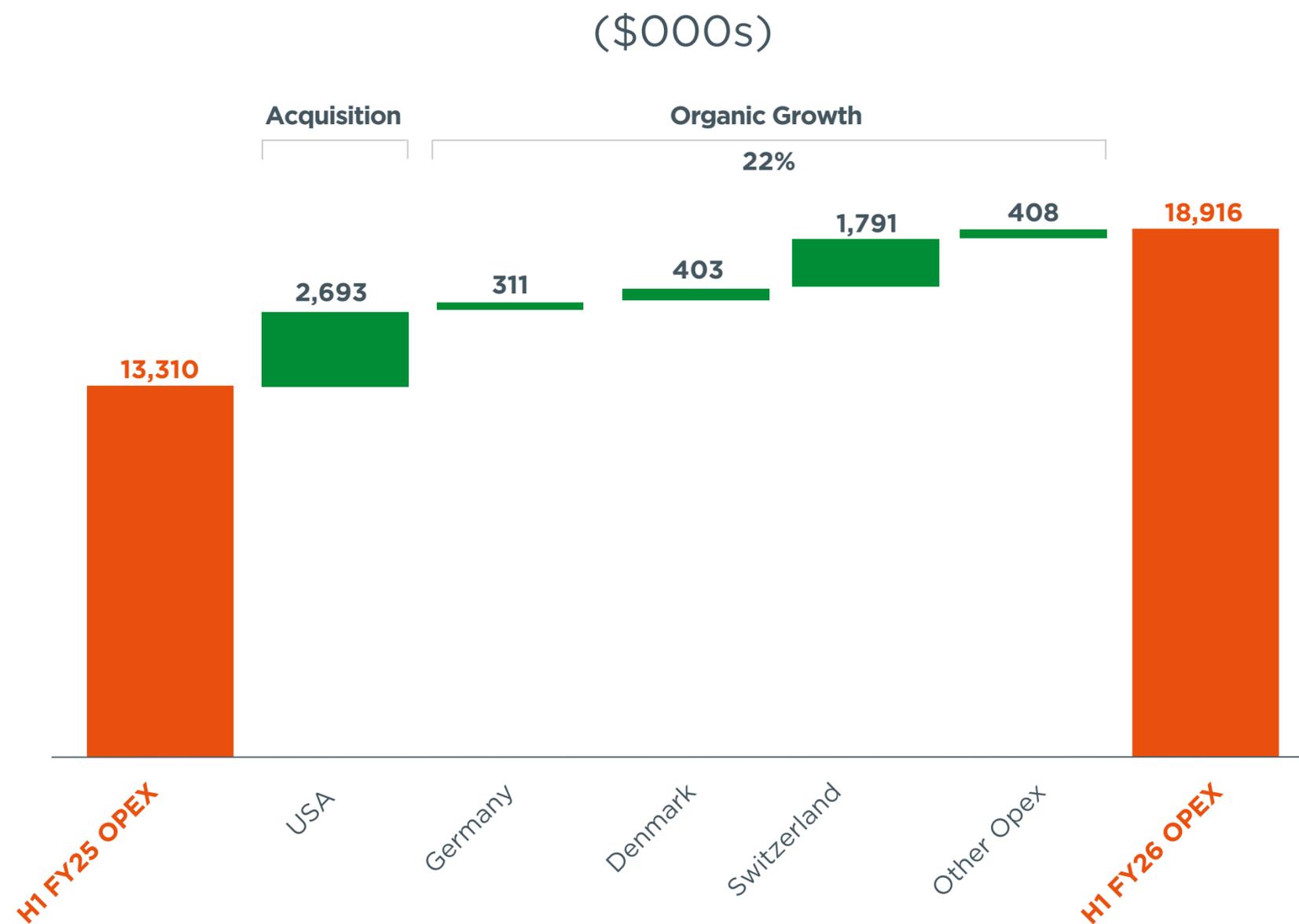
Sources of cash	m's
Free cashflow <sup>2</sup>	10.4
<b>Uses of cash</b>	
Growth capex (organic growth)	(4.7)
New territory expansion (Switzerland)	(1.8)
Net debt/interest movement	(0.9)
Other non operating/non recurring items	(0.4)
	<b>(7.8)</b>
Net movement in cash	2.6
Opening cash <sup>1</sup>	12.7
Closing cash <sup>1</sup>	<b>15.3</b>

<sup>1</sup> Excludes cash held on behalf of customers.

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# Operating expense analysis

| Increased costs reflect scaling territories for growth and acquisition of Peak Parking



Overheads include \$2.7m from Peak Parking (USA) acquired in February 2025.

Overheads include \$1.8m from Smart Parking Switzerland (commenced operations in July 2025).

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# Strong Balance Sheet to Fund Growth Strategy

Group Financial Position (\$m)

\$m's	Dec-25	Jun-25
Current assets	<b>46.7</b>	41.3
Non-current assets	<b>86.3</b>	90.8
<b>Total assets</b>	<b>133.0</b>	132.1
Current liabilities	<b>34.1</b>	34.3
Non-current liabilities	<b>8.1</b>	10.0
<b>Total equity</b>	<b>90.8</b>	87.8
<b>Cash &amp; cash equivalents<sup>1</sup></b>	<b>15.3</b>	12.7

<sup>1</sup> Excludes cash held on behalf of customers.

\$15.3m of cash, which excludes \$10.2m of cash held on behalf of customers – capital to fund growth strategies.

Debt facilities established in November 2024 includes a USD \$10m revolving credit facility and a A\$10m accordion facility made available for general corporate purposes and certain permitted acquisitions for a 3 year term.

Debt free in July 2025 following the \$0.8m repayment of the revolving HSBC facility.

# Growth strategy – multiple drivers



| Three key pillars for growth

## Organic growth

Growth in sites = growth in PBNs = **revenue & profitability**

**High incremental margin**  
leveraging existing fixed cost base

**Existing and New markets:**



TAM 45,000 SITES



TAM 2bn PARKING SPACES



TAM 3,000 SITES



TAM 90,000 SITES



TAM 10,000 SITES



TAM 10,000 SITES

## New territories



Investigating and evaluating **new market territories across Scandinavia, mainland Europe and USA**

Focused on territories with appropriate regulatory environment where SPZ can **leverage SmartCloud IP and market leading AI driven technology**

## Acquisitions



**Good pipeline** of opportunities  
Adding scale where SPZ has successful operations and market intelligence

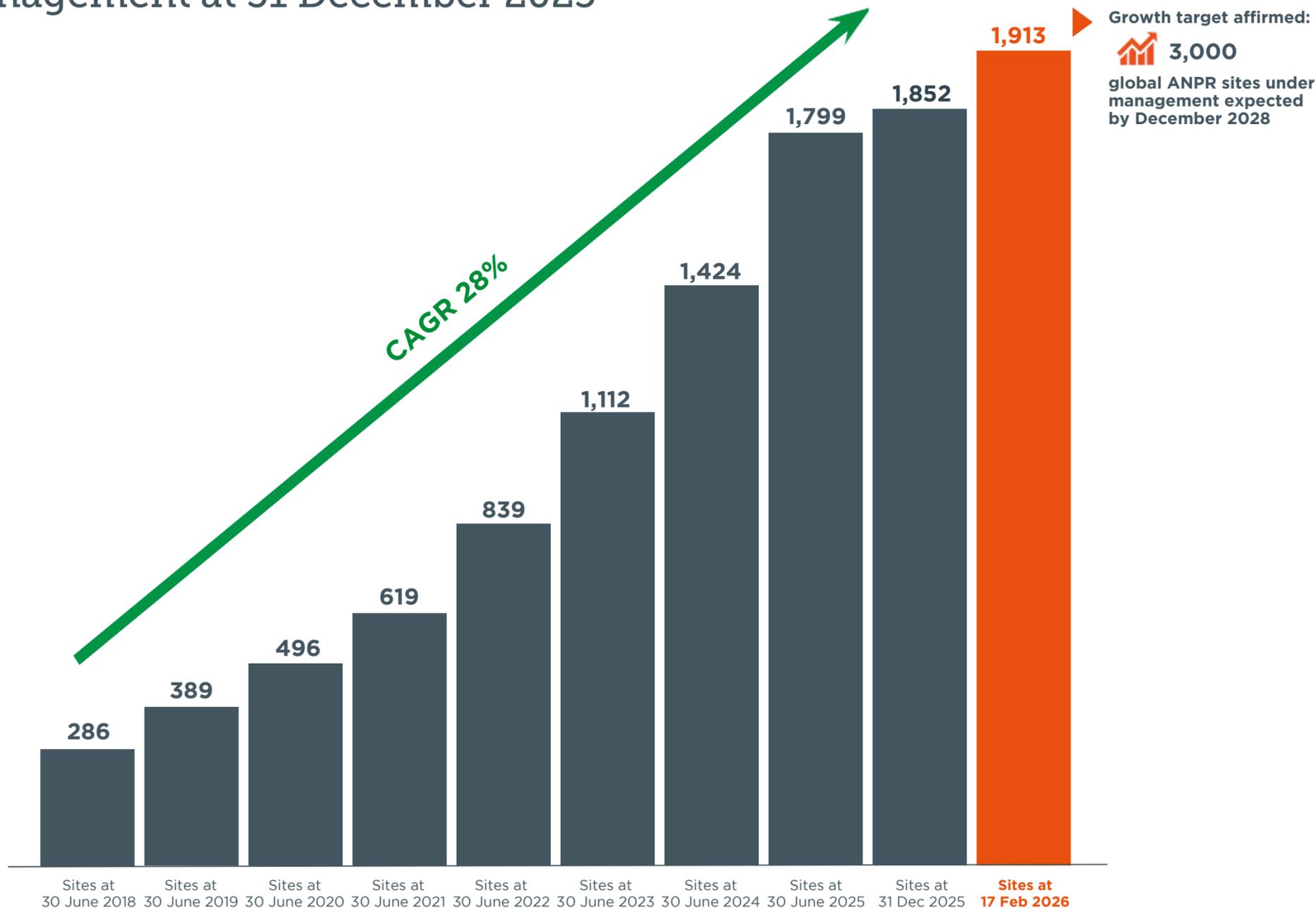
Disciplined selection criteria:  
Strategic fit, technology, and **earnings accretion**

Ability to leverage technology and deep domain expertise to **deliver synergies**

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# H1 FY26 Growth Continuing With Traction in New Markets

ANPR Site growth of 19% from PCP, 1,852 global sites under management at 31 December 2025



Long term site growth CAGR 28%.

Rate of new site additions is accelerating, with 200 gross ANPR sites added.

Strategies underway to enhance yield across the portfolio by optimising sites and redeploying hardware and technology from non-performing locations.

US ANPR sites underway, operating in Texas and Georgia, with expansion planned into further States.

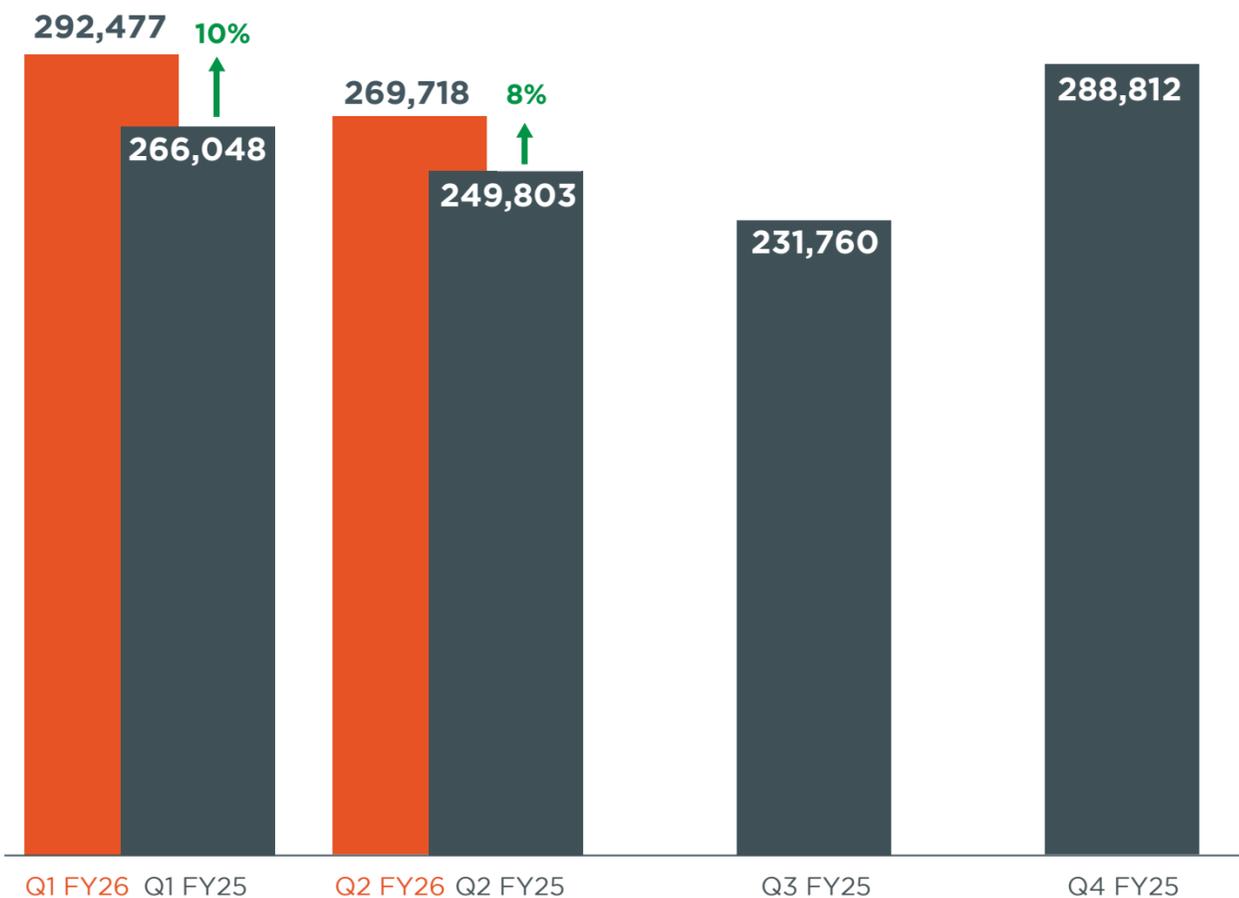
3,000 sites target reaffirmed by December 2028.

# Strong Growth Underway

| H1 FY26 record PBNs issued, up 9% vs PCP

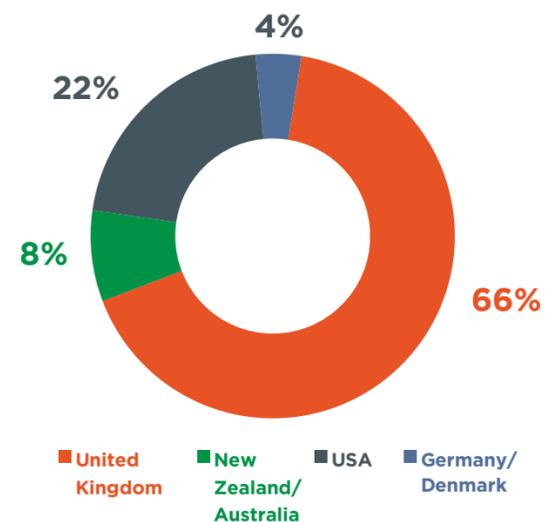
## Parking Breach Notices Issued

H1 FY26 Average Quarterly PBNs 281,098 (up 9% on H1 FY25)

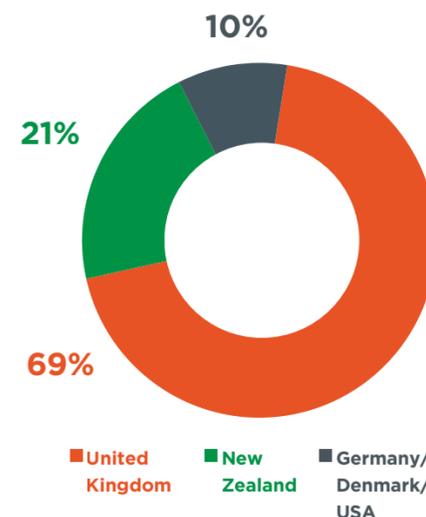


Reduction in PBNs in Q2 and Q3 is in line with normal seasonal variations.

## Revenue % by Country



## PBN's Issued % by Country



Continuing to expand and enhance sales and account management capability to capture market share across all operating territories.

In FY19, the UK generated 100% of the Group's PBNs. In H1 FY26, this has reduced to 69% as the Group continues to diversify and expand into new markets in line with the SPZ strategy.

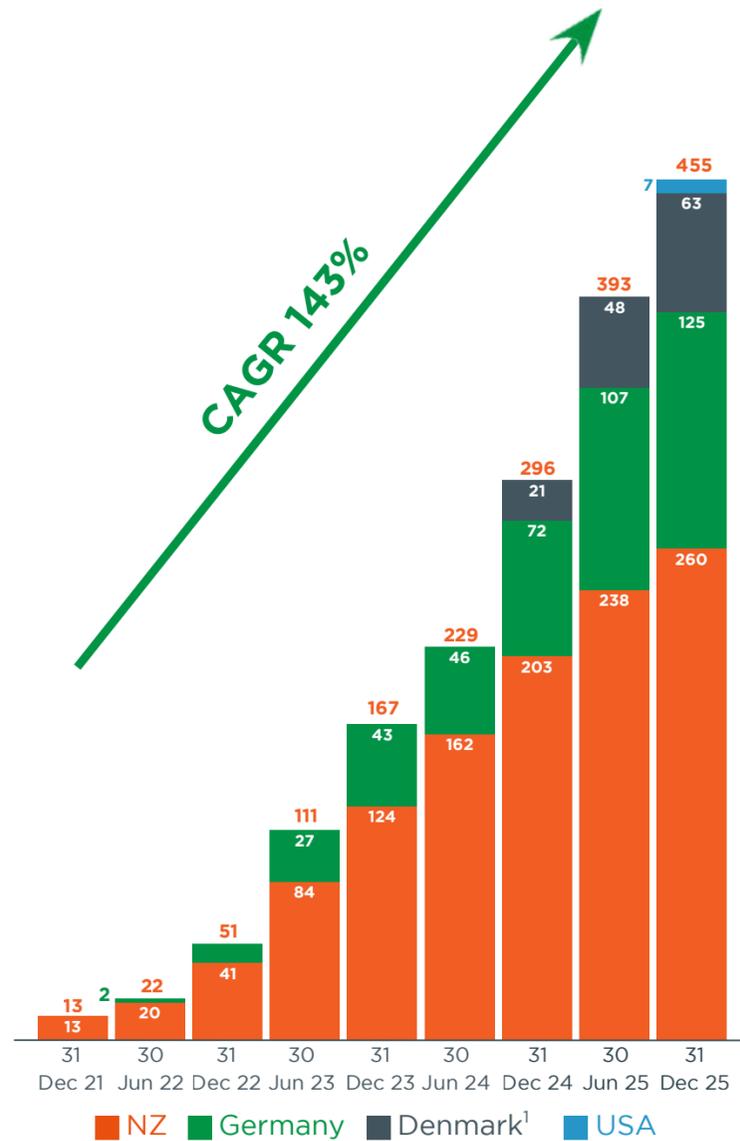
Territory diversification is making SPZ a stronger, more resilient business for the long-term.

# New Territory Growth Underway

| Successfully scaling new territories

### ANPR Sites

H1 FY26 new territory sites under management up **54%** on PCP



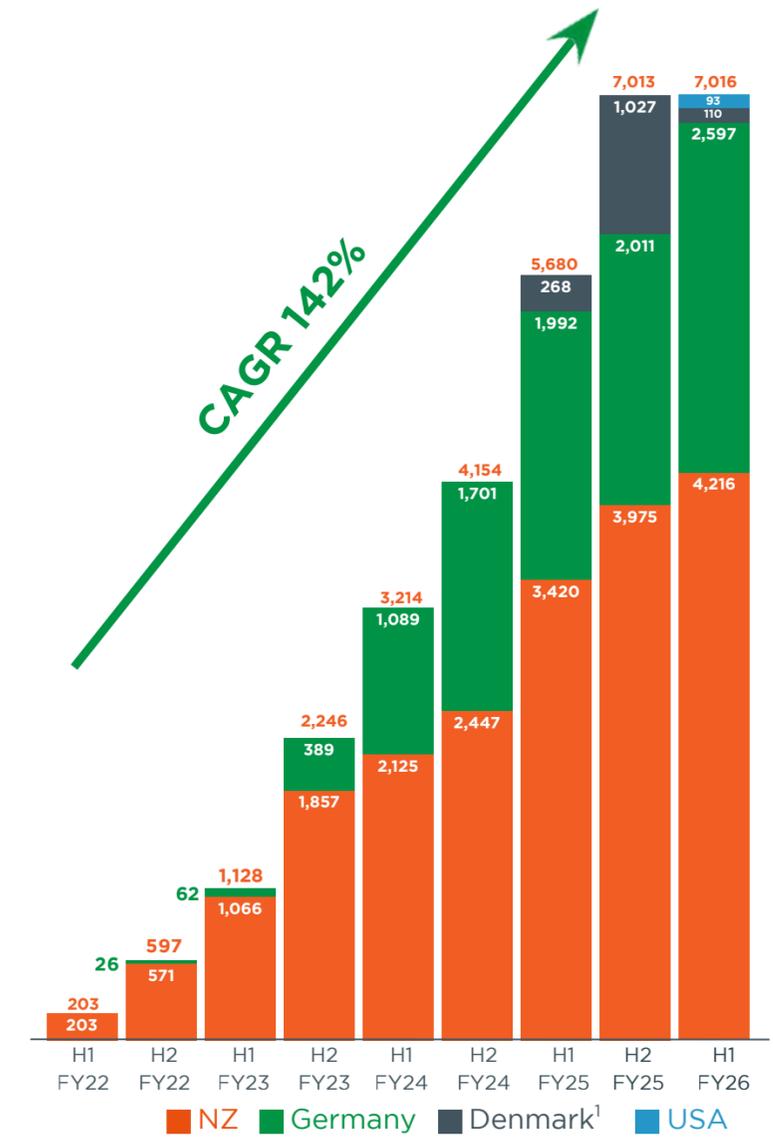
### Parking Breach Notices Issued

H1 FY26 new territory PBNs up **40%** on PCP



### PBN Revenue (000s)

H1 FY26 new territory PBN revenue up **24%** on PCP



<sup>1</sup> Denmark switched to manual operations from 1 July 2025, resulting in lower issuance and higher costs.

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# Proven Execution Strengths

The SPZ model is transportable, scalable & capital light



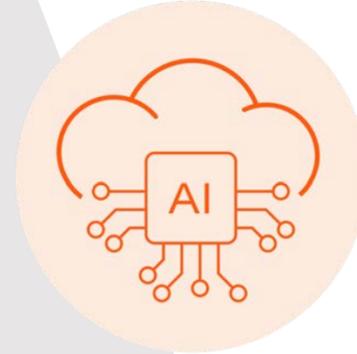
## Sales Delivery

- Disciplined sales approach delivering success across all territories.
- Experts in identifying new locations, building, and converting sales pipelines.
- Best in class customer focus, providing positive outcomes.
- Deep domain expertise and highly trained sales professionals understand the customer challenges, delivering SPZ a significant competitive advantage.



## Operational Excellence

- In-house operational teams working to high standards, delivering first-class technology installations.
- High capacity installations – focused on delivering 3,000 ANPR sites under management by December 2028, demonstrating a well-oiled, highly trained team delivering for the business and SPZ customers.
- Best-in-class process ensures in excess of 99% uptime of sites installed, delivering high levels of camera accuracy and image match rates.



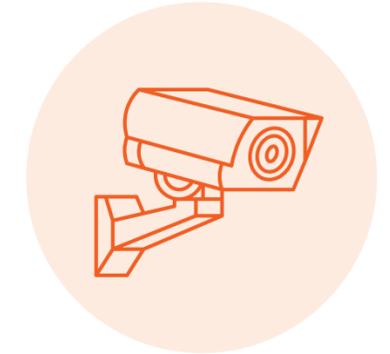
## Technology

- SPZ's proprietary technology, SmartCloud, continues to lead the market, providing SPZ with flexibility and a competitive advantage when entering new territories.
- In-house R&D teams provide SPZ with speed when developing new features, keeping us ahead of the market and delivering a great customer experience.
- Embracing AI development to deliver faster processes to generate revenue and drive down costs.



## Capital Deployment

- Capital light business model (minimal maintenance capex required).
- New sites generate a rapid return on capital deployed.
- Highly cash flow generative model that allows SPZ to expand organically, enter new territories and successfully integrate new acquisitions.



## Regulatory

- SPZ operates in a regulated environment with frequent contact with government departments.
- Regular audits from trade associations, driver vehicle license agency (DVLA), and Transport Agencies are always delivered as GREEN, demonstrating the highest level of compliance.
- SPZ gains a competitive advantage from high compliance, ensuring we are raising industry standards and lead the market with technology and a keen focus on customer excellence!

# Growth Priorities – 3,000 Organic ANPR Site Target

- ✓ Long-term organic site target of 3,000 sites under management by December 2028, reaffirmed.
- ✓ Long term strategy execution continuing with the highly accretive acquisition (>30%) of Texas based Peak Parking. The acquisition provides SPZ with access to the largest parking operations market in the world to leverage our market leading proprietary technology.
- ✓ Continuing to drive organic growth in the UK, Germany, Denmark, New Zealand, Switzerland and the USA.
- ✓ Continued focus on expansion into new territories and maintained disciplined M&A strategy and strong balance sheet.

*\* All forward-looking statements can be subject to change.*



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# Supplementary Information



# Smart Parking Ltd (ASX:SPZ)



A global company focused on delivering industry leading technology innovations and solutions within the parking industry

## Parking management services

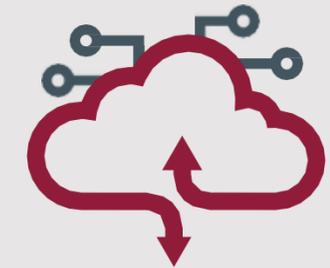
Provision of parking management solutions, predominantly servicing the retail sector, managing agents and land owners across multiple territories. SPZ operates in the United Kingdom, New Zealand, Germany, Denmark, Switzerland, and the United States of America. SPZ is focused on expanding into new regions to deliver market leading proprietary technology services.

## Technology

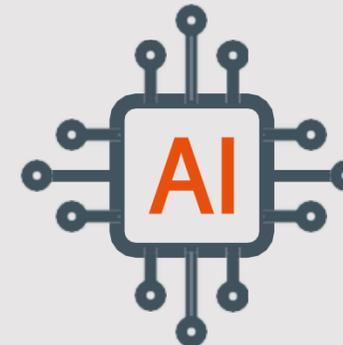
Proprietary technology to facilitate the growth of parking management services. Competitive advantage - SmartCloud allows successful plate matching with infringement business rules, mapping the full life cycle of a breach notice from issuance to payment or collection.



OVER 16.6 MILLION CARS PER MONTH THROUGH THE ESTATE



OVER 33m SMARTCLOUD TRANSACTIONS PER DAY



UTILISING AI TECHNOLOGY TO IMPROVE PLATE RECOGNITION



OVER 1500 CUSTOMERS WORLDWIDE



SALES AND OPERATIONS IN UK, USA, GERMANY, NZ, AUSTRALIA, DENMARK & SWITZERLAND

# Segment Reporting

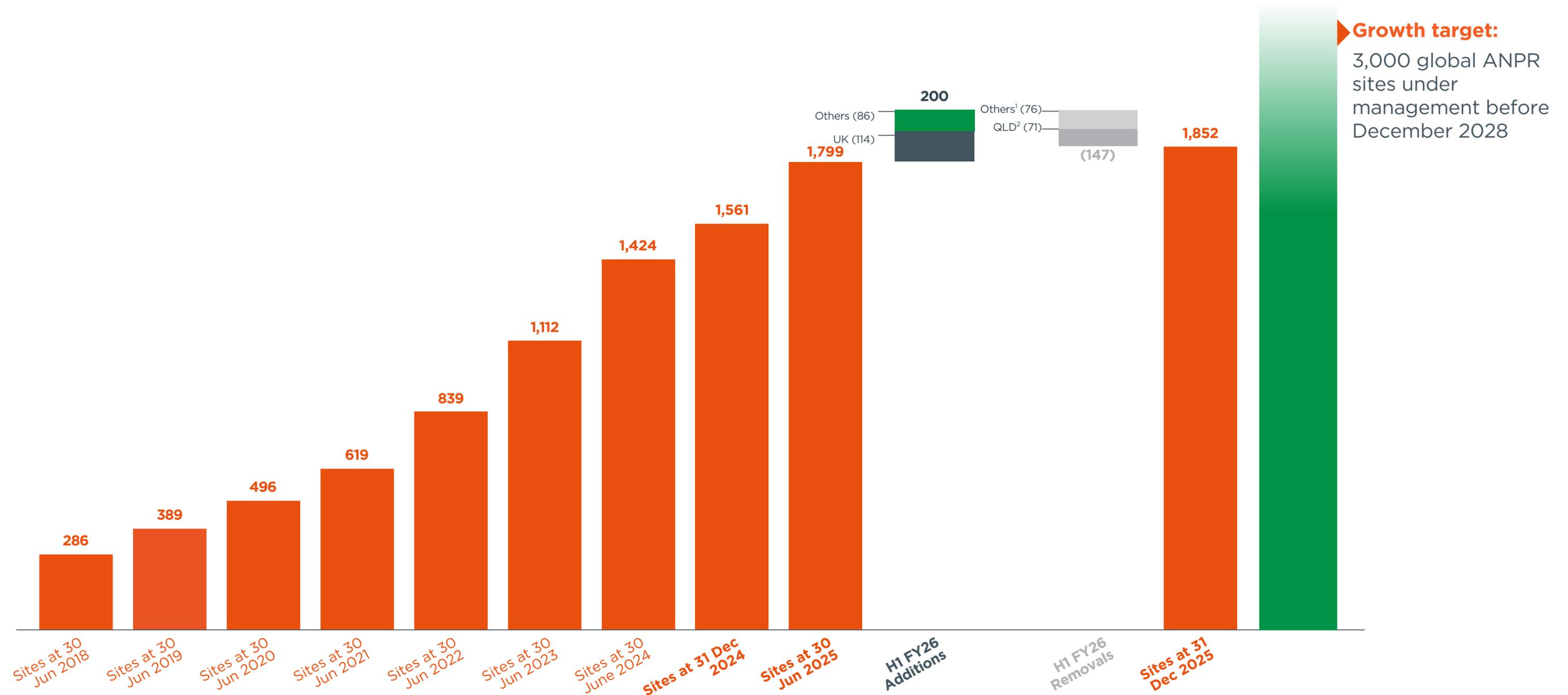


(\$000's)	Revenue			Adjusted EBITDA			Adjusted EBITDA Margin		
	H1 FY25	H1 FY26	H1 FY25 vs H1 FY26	H1 FY25	H1 FY26	H1 FY25 vs H1 FY26	H1 FY25	H1 FY26	
Parking Management	31,083	<b>62,034</b>	<b>99.6%</b>	7,996	<b>14,324</b>	79.1%	25.7%	<b>23.1%</b>	
Technology Division	2,554	<b>3,060</b>	<b>19.8%</b>	1,580	<b>2,464</b>	55.9%	61.9%	<b>80.5%</b>	
Research & Development	-	-	-	(324)	<b>(342)</b>	5.6%	-	-	
	33,637	<b>65,094</b>	<b>93.5%</b>	9,252	<b>16,446</b>	77.8%	27.5%	<b>25.3%</b>	
Corporate	96	<b>119</b>	<b>24.0%</b>	(814)	<b>(878)</b>	7.9%	-	-	
Eliminations	(1,727)	<b>(2,460)</b>	<b>42.4%</b>	-	-	-	-	-	
<b>Revenue / Adjusted EBITDA excluding one-off costs</b>	32,006	<b>62,753</b>	<b>96.1%</b>	8,438	<b>15,568</b>	84.5%	26.4%	<b>24.8%</b>	

# Management Services – ANPR Estate Growth



| 1,852 global ANPR sites under management at 31 December 2025



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<sup>1</sup> Enhance site optimisation to redeploy hardware and technology from non-performing locations.  
<sup>2</sup> 71 site removals in Queensland, Australia with equipment being redeployed in New Zealand.

## ANPR: How It Works

Automatic number / license plate recognition (ANPR) is a reliable, cost effective off-street parking management solution.

**It is proven to serve a wide range of industries including supermarkets, retail, hotels, hospitals and leisure centres. Smart Parking's ANPR solution ensures greater compliance and increased parking revenue.**

- Ticketless, barrier-free system, parking areas that are managed 24/7
- Automatically generated and issued parking charge notices
- Increased security, comprehensive reporting and account management



# Smart Parking Technology - Smart Vision

The R&D team has continued to deliver further modules within Smart Vision, extending our detections across regions, as well as object detection, resulting in further positive outcomes for both customer and business.

Provides a revolutionary way to improve vehicle number plate recognition managed by Smart Parking - with a particular focus on optimising vehicle match rates and tailoring this technology to specific business regions UK, Germany, Denmark, New Zealand, USA, and Switzerland.

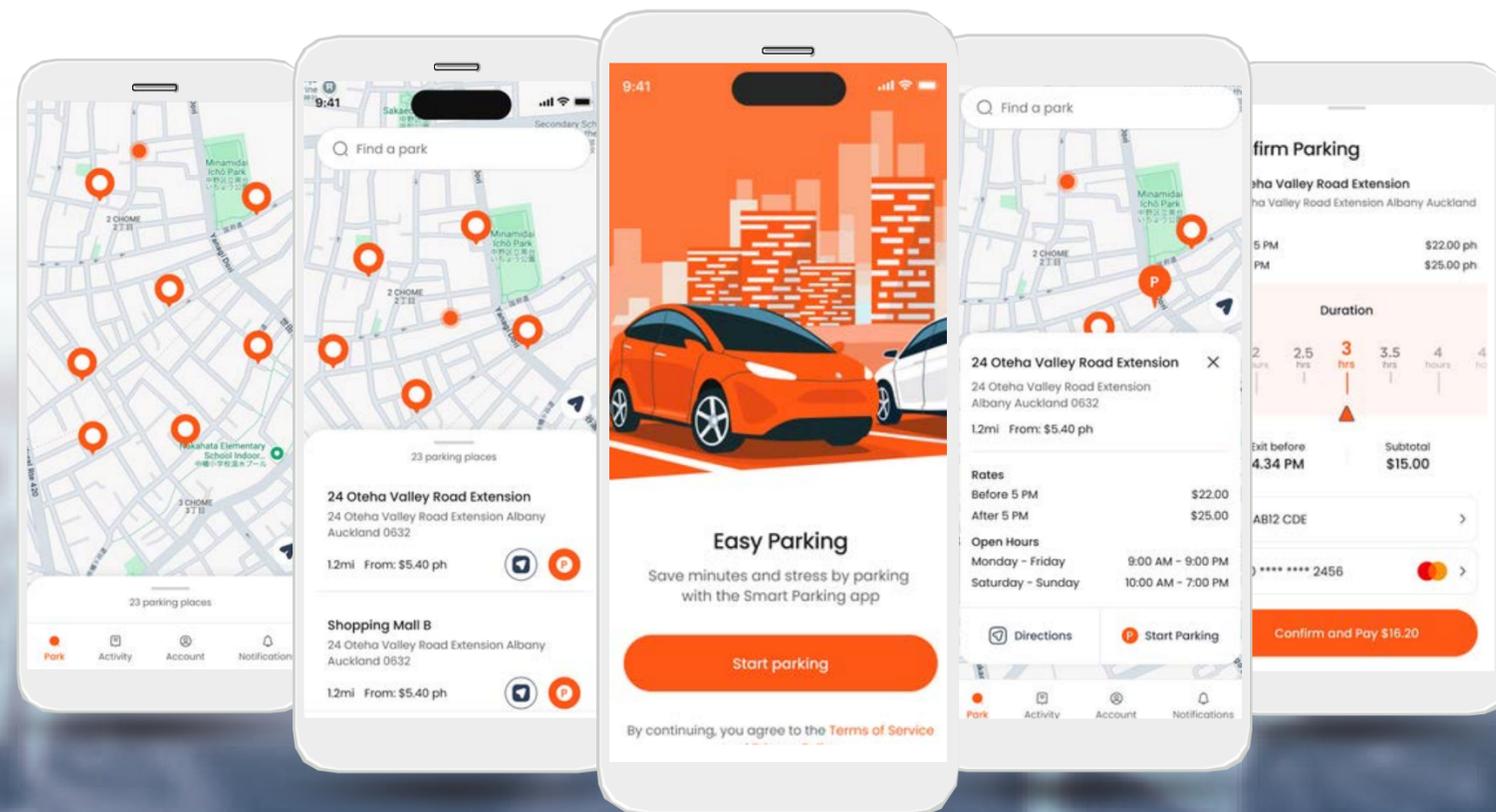
This AI driven innovation will allow an additional 8 million vehicles to be reviewed by SmartCloud Platform annually - this is just the current installation portfolio.

As the software is driven with AI, the software model will continue to learn and evolve allowing more improvements to be achieved.

This also allows Smart Parking to be camera “agnostic” as the real IP is in Smart Cloud and not the camera.

# Smart Parking Technology - Smart Parking App

Smart Parking continues to innovate in order to drive growth. The development of a new payment app was delivered, complementing our compliance product suites.



Expand our portfolio further by bringing consumer compliance offerings inhouse.

Ability to offer automatic payment with ANPR cameras at parking facility entrances and exits. Handling parking session start, stop, and payment automatically via account and camera detection using SmartVision.

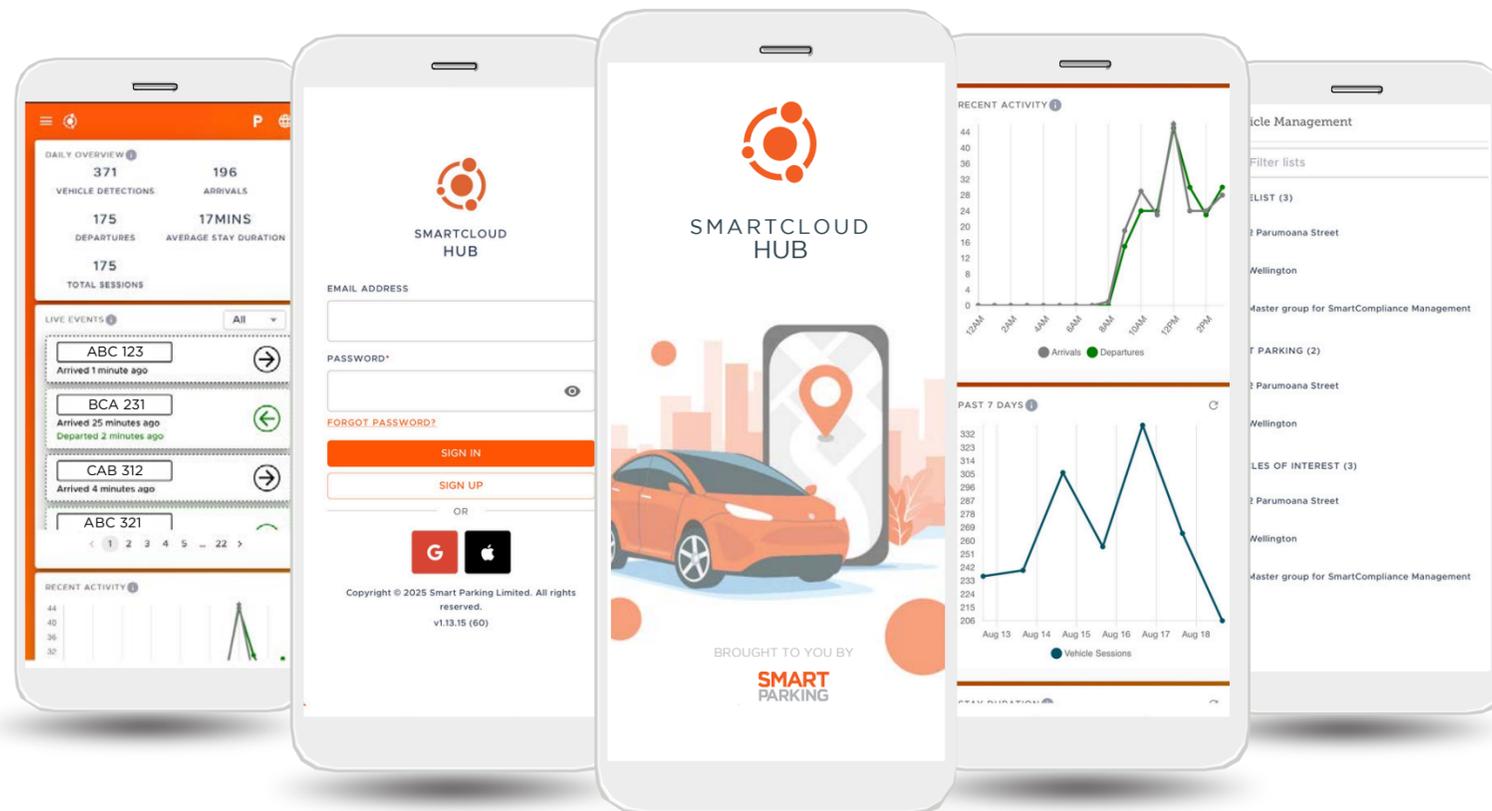
Hands-free experience: no tickets, no machine, just park and go.

Expansion options available to enabled mobile app based Permits, Subscriptions and reservations.

Global use case across all Smart Parking sites.

# Smart Parking Technology - Smart Cloud Hub

Smart Parking continues to innovate in order to drive growth and efficiency. Our R&D team continue to deliver new products that will drive positive outcomes for both customer and business.



HUB is a customer portal that lets land owners and Smart Parking customers see what's really happening on their sites.

A full reporting suite allows customers to view and have control over business decisions that impact their customers on a daily basis.

The team continues to deliver further enhancements to HUB that have opened up new market verticals, in particular housing associations with the housing tenants able to add and exempt plates/ visitors via a phone app.

This feature ensures the tenant's car park is managed effectively with a complete audit trail for the land owner who has used the property and if enforcement action is required.

This is particularly popular in Denmark, Germany and with UK housing associations showing interest to manage inner city estate parking.

# Glossary

Adjusted EBITDA - The Board assesses the underlying performance of the Group based on a measure of Adjusted EBITDA which takes into account costs incurred in the current period but which are non-operating and/or are not expected to occur in the future.

EBITDA - Represents Earnings before interest, taxation, depreciation and amortisation, and profit/loss on disposal of plant and equipment.

UNPATA - Calculated as underlying net profit after tax before the after-tax impact of amortisation of customer relationships from acquisition, non-recurring/non-operating items, foreign exchange gains/losses, and includes the normalisation of tax expense.

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