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Q1 FY27 Earnings Update

FOS Capital Limited (ASX: FOS) is pleased to provide an earnings update for Q1 of the financial year ending 30 June 2027.

Following the implementation of the Company's cost reduction program, a strengthened order book, growing infrastructure opportunities, and improving trading conditions, the Board expects a significant improvement in earnings performance and a return to profitability during FY27.

Based on trading completed to date and orders currently scheduled for delivery, Q1 FY27 revenue is expected to be $7.2 million and EBITDA $0.5 million, which would represent the second strongest quarterly sales result in the Company's history.

This update reflects:

- $2 million of annualised cost savings identified, with around $1 million already implemented and the balance expected to be delivered during FY27;
- An order book of $10 million, the highest level in more than two years;
- A record active quote pipeline of $130 million;
- Continued growth opportunities within Aldridge Traffic Systems following recent Eastern Freeway project wins;
- The $2.5 million Queensland Schools Lighting upgrade program;
- A growing tender pipeline.

This announcement has been authorised for release to the ASX by the FOS Capital Limited Board of Directors. All dollar values quoted exclude GST. Financial information contained in this announcement is unaudited, and any forward-looking statements are subject to market risks and uncertainties.

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