



# Market Update

23 February 2026



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<b>Group Sales Revenue</b>	<b>\$200.1 million</b>	 <b>16.9% on pcp</b>
<b>Profit After Tax</b>	<b>\$22.9 million</b>	 <b>18.0% on pcp *</b>
<b>Basic Earnings per Share</b>	<b>52.4 cents</b>	 <b>13.5%</b>
<b>Dividends per Share</b>	<b>36.0 cents</b>	 <b>12.5% **</b>

**Significant comparisons to Prior Corresponding Period (pcp):**

\* 18.0% PAT growth is on a like-for-like basis, i.e. excluding the sale of our Christchurch property in July 2025, which increased PAT in the pcp by \$0.4m. Reported PAT increased by 15.5%

\*\* Our DRP operated for the Interim Dividend in the pcp but will not operate for the current period.

# FY2025 Darra Branch Upgrade

**Aerial picture of Darra Branch (Brisbane) following its upgrade in FY 2025**

Doubling operating capacity and stock holding and gaining full control of the site



## Auckland - North Shore

### **New Branch**

In the final stages of setup

Trading commencement planned for 1<sup>st</sup> March 2026

## Toowoomba

### **Existing Branch relocation**

Construction has commenced

Trading commencement planned for 1<sup>st</sup> Quarter FY2027

## Perth

### **Existing Branch relocation**

Site works have commenced

Trading commencement planned for late 2<sup>nd</sup> quarter FY2027

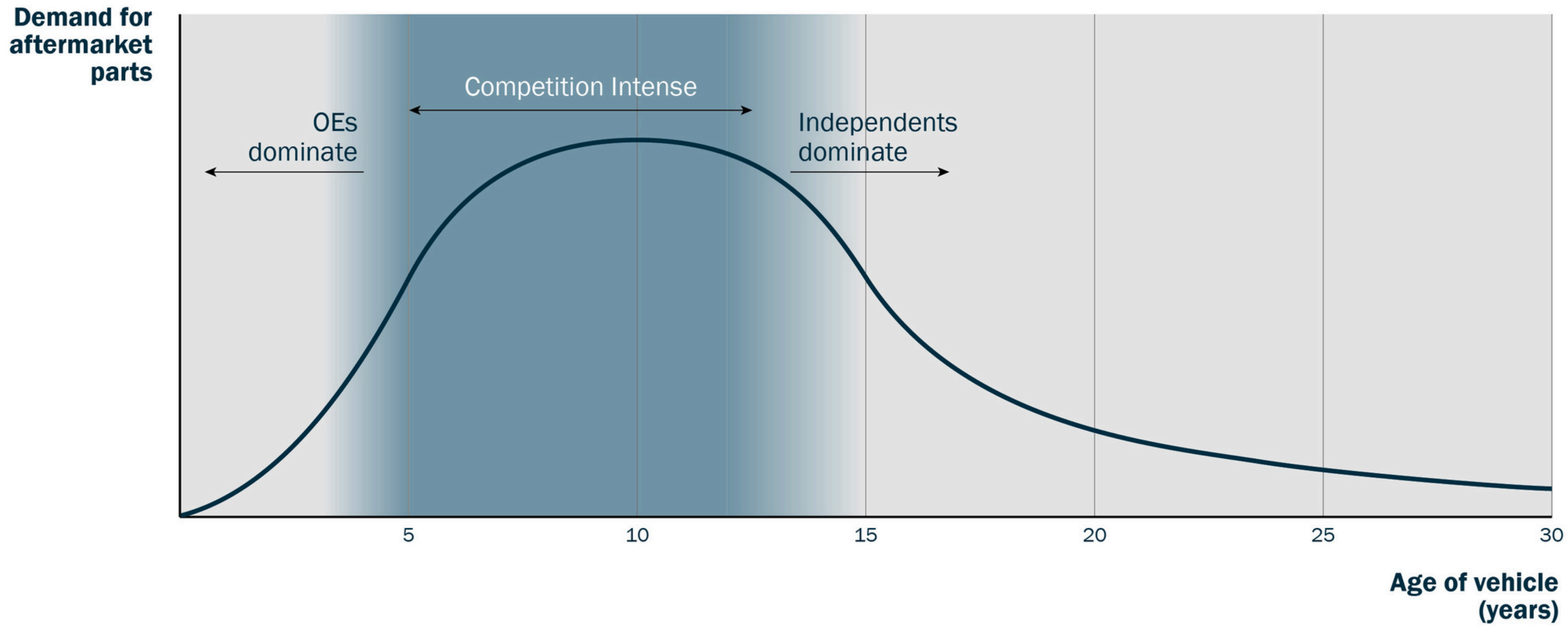
## Brisbane

### **Existing Branch upgrade**

More than doubling storage and throughput capacity

Full capacity integration planned for 3<sup>rd</sup> Quarter FY2027

## CV4+ PARTS DEMAND PROFILE AUSTRALIA / NEW ZEALAND



## OEs - The vehicle manufacturers and their franchise networks

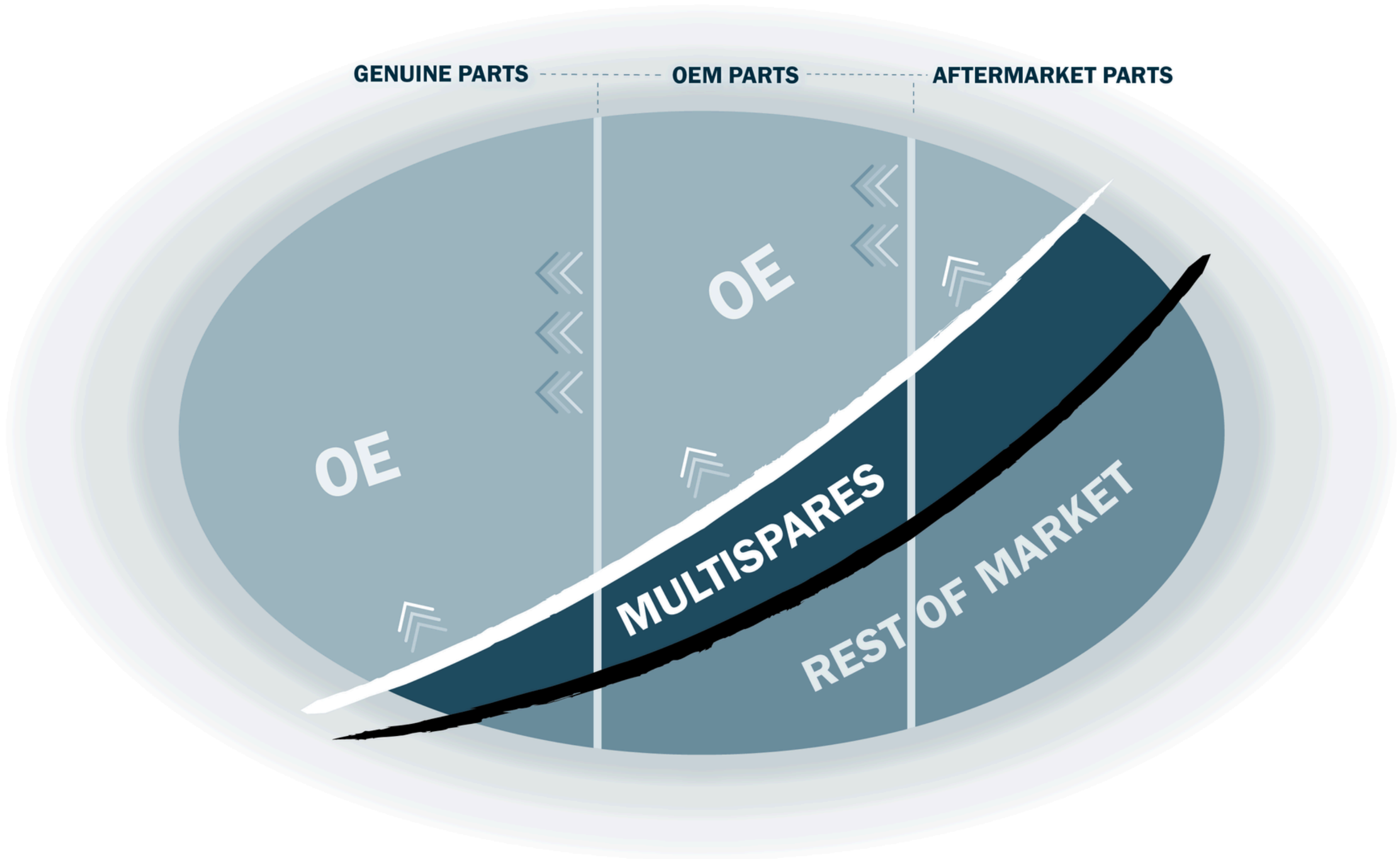
### OEs have natural advantages in the early years of a vehicle's life:

- Relationship established at time the vehicle is sold
- Potential for contracts that extend vehicle warranty in exchange for exclusive use of Genuine Parts
- Full technical support capability, which is most important during the first few years following a new model release

## Independents - All parts suppliers not contracted to OEs

### Independents also have natural advantages throughout a vehicle's life:

- Flexible sourcing
- No conflict of interest with Fleet and Independent workshops
- Flexibility to build services related to parts supply, unrestricted by OE contracts



## Definitions

- Genuine Parts -** Parts packaged with an OE logo, e.g. Isuzu, Volvo, Kenworth, etc
- OEM Parts -** Parts manufactured by companies approved to manufacture equivalent Genuine Parts
- Aftermarket Parts -** All other replacement parts

## Long Term Market Trends

### **OEM Parts and Aftermarket Parts are increasing market share**

This has been indicated graphically with leftward directional trends on the boundaries between Genuine / OEM Parts and between OEM Parts / Aftermarket Parts

### **Multispares (the trading operation for SNL) has also been increasing market share**

This has been indicated graphically with upward directional trends on the white curved boundary between OE market share and Multispares market share

# Looking Ahead

- There have not been any changes to market dynamics, market strength or other external factors that would or should materially change our opportunities and business development plans.
- Current network development and IT projects are progressing well, without material change to cost expectations and, once completed, are expected to make a significant contribution to future operating capabilities.
- We are on track to meet or beat the \$50m revenue growth target we set ourselves for FY2026.
- We will provide more commentary on financial performance following release of our FY2026 financial reports.



**SNL** // // //

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