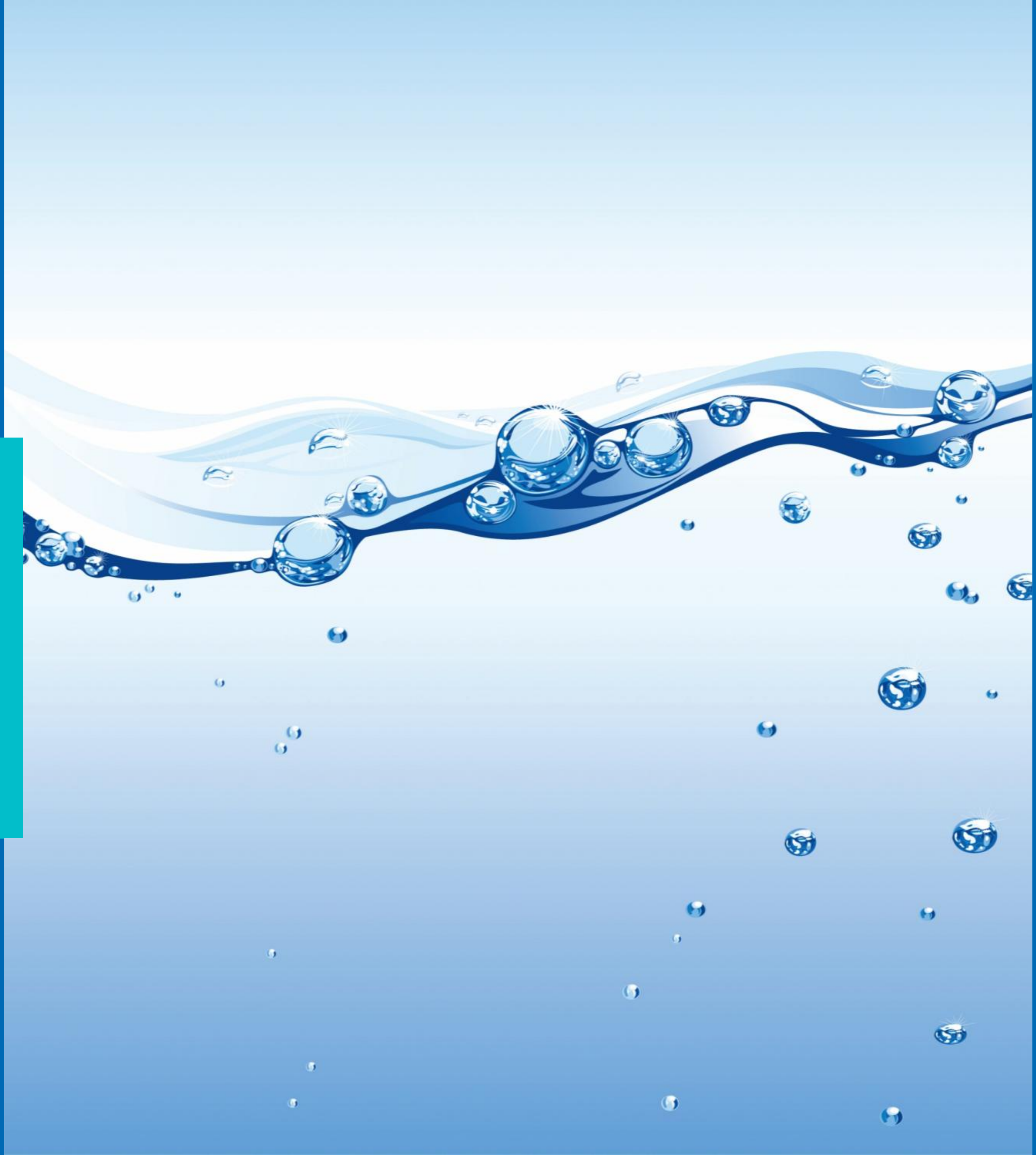
water, the liquid of life

FY2026
Results Presentation

ASX:WAT
www.waterco.com.au

28 August 2026



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Important notices

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Summary information

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Waterco's results are reported under International Financial Reporting Standards (IFRS). This Presentation also includes certain non-IFRS measures including "underlying", "adjusted" and "pro-forma" and other measures that are used internally by management to assess the operational performance of the businesses in the Group. Non-IFRS measures have not been subject to audit or review. All numbers listed as "statutory" comply with IFRS and are in the process of being audited.

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Past performance is no guarantee of future performance.

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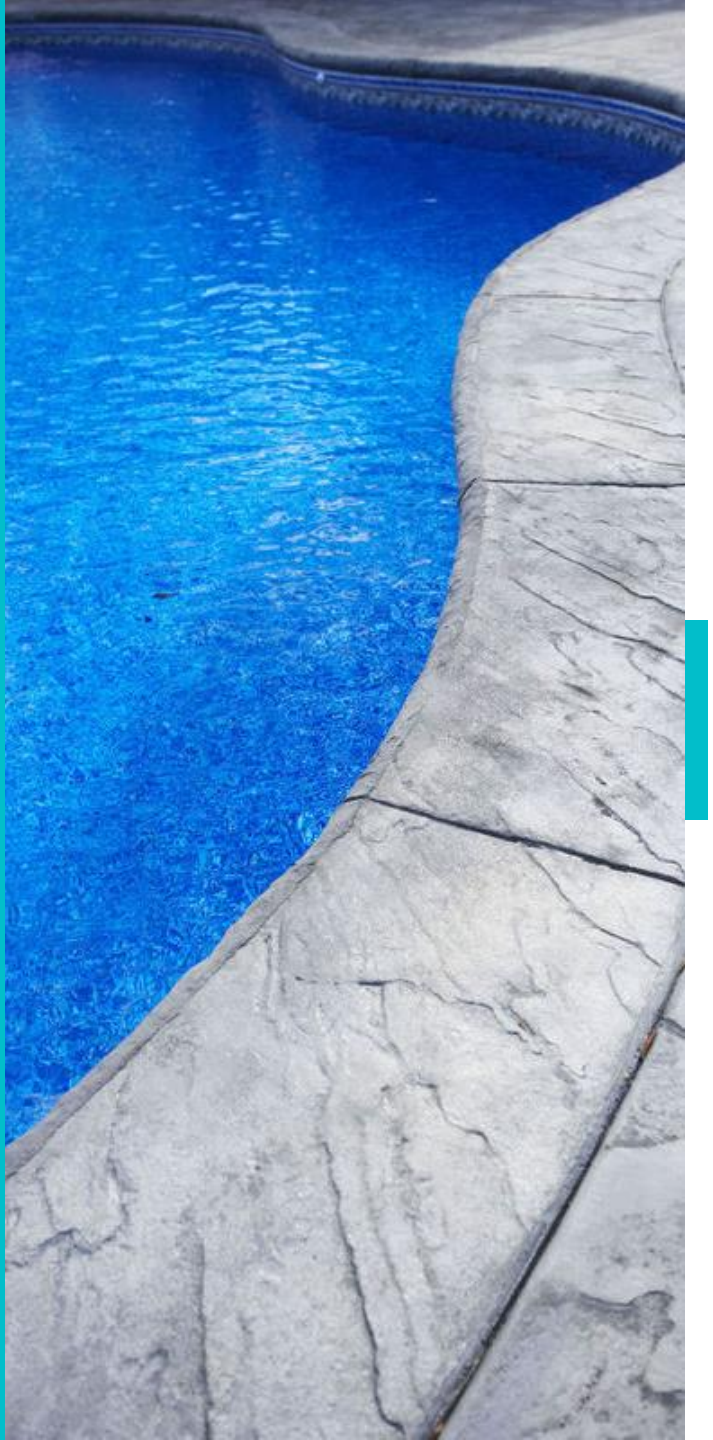
FY26 Results Highlights



01

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Financial Highlights

Improved earnings and margins on a steady sales base, with further margin progress the priority ahead.

Sales Revenue ↑ up 1% to $253.0m	**Underlying[1] EBIT** ↑ up 20% to $24.8m	**Statutory EBIT** ↑ up 42% to $23.8m	**Statutory NPAT** ↑ up 59% to $15.4m
Statutory EPS ↑ up 62% to 44.0 cents	**Revenue Growth** ↑ 17% CAGR over 5 years	**EBIT Growth** ↑ 20% CAGR over 5 years	**FY26 Total Dividend** ↑ 20 cents per share (fully franked)

1. Refer to the Appendix for further information on Non-IFRS financial measures.

Full Year Results ending 30 June 2026

Results Summary[1]

Financial Period Ended ($ million)	FY26	FY25	% Change
Operating revenue	259.3	254.9	2%
Sales revenue	253.0	249.4	1%
Underlying EBITDA	36.9	33.2	11%
Underlying EBIT	24.8	20.6	20%
Statutory EBIT	**23.8**	**16.7**	42%
Underlying EBIT / Sales Revenue	9.8%	8.3%	19%
Underlying NPBT	20.5	16.1	27%
Underlying NPAT	**16.1**	**12.4**	30%
Statutory NPAT	**15.4**	**9.6**	59%
Underlying EPS (cents)	46.0	35.2	31%
Dividends per share (cents)	20	15	33%

Underlying Divisional EBIT ($ million)	FY26	FY25	% Change
Australia and New Zealand	12.5	13.1	-4%
North America and Europe	7.2	4.3	67%
Asia and Middle East	5.1	3.3	57%
Consolidated Underlying EBIT	**24.8**	**20.6**	**20%**

Key Highlights

- Sales revenue grew 1% to $253.0 million.
- ANZ sales down 3% on supply chain realignment; North America and Europe up 21%, Asia and Middle East up 11%.
- Underlying EBIT up 20% to $24.8 million.
- Statutory EBIT up 42% to $23.8 million.
- EBIT margin improved from 6.7% to 9.4% statutory and 8.3% to 9.8% underlying, on insourcing and cost discipline.
- Underlying NPAT of $16.1 million, up 30% to prior year.
- Statutory NPAT of $15.4 million, up 59% to prior year.
- Underlying EPS of 46.0 cents.
- Total declared dividend of 20 cents per share fully franked supported by an improved earnings position.

1. Refer to the Appendix for further information on Non-IFRS financial measures.

Operational Highlights

Strategic Insourcing

Malaysian insourcing of strategic plastic components lifted Group margins, with the supply chain migration secured and land acquired for expansion.

Product Development

Electrochlor GEN2 and the OPTI inline chlorine sensor extend connected water management, alongside MultiCyclone 16 GEN2 and a new B2B trade portal.

Swimart Transformation

Retail sales and Waterco purchases grew again, with further store conversions and the ERP and point-of-sale platform rolled out to 45 locations.

Davey Integration

Warehouse consolidation largely completed, with cost savings flowing from FY27 and both brands retained under a "two brands, one backbone" model.

International Growth

A strategic distribution alliance was established in Europe, and Middle East operations formally commenced with demand resilient despite disruption.

North America

Record profitability in the United States despite tariffs, driven by growth in commercial applications and custom-designed pressure vessels.

Delivering on the Reset

FY25 actions, FY26 outcomes

FY25 set out the actions to rebase the Group and the priorities for FY26. Each is reported against below.

Treasury and FX clean-up

- Foreign exchange losses reduced from $2.5 million to $1.0 million

Davey cost base reset

- Warehouse consolidation largely complete, with annual savings from FY27

Geographic expansion

- Middle East operations formally commenced; European distribution alliance established

Innovation pipeline

- Electrochlor GEN2, OPTI and the B2B trade portal delivered

Earnings outcome

- EBIT margin 6.7% to 9.4%, ROCE 12.3% to 13.4%, underlying EBIT up 20%

Cash and capital

- Operating cash flow of $14.3 million and net debt of $31.3 million reflect higher tax paid than expensed, inventory build and capex of $8.6 million ($6.4 million in Asia)

FY27 focus

- Lifting the EBIT to sales ratio through closer management of sales and margins

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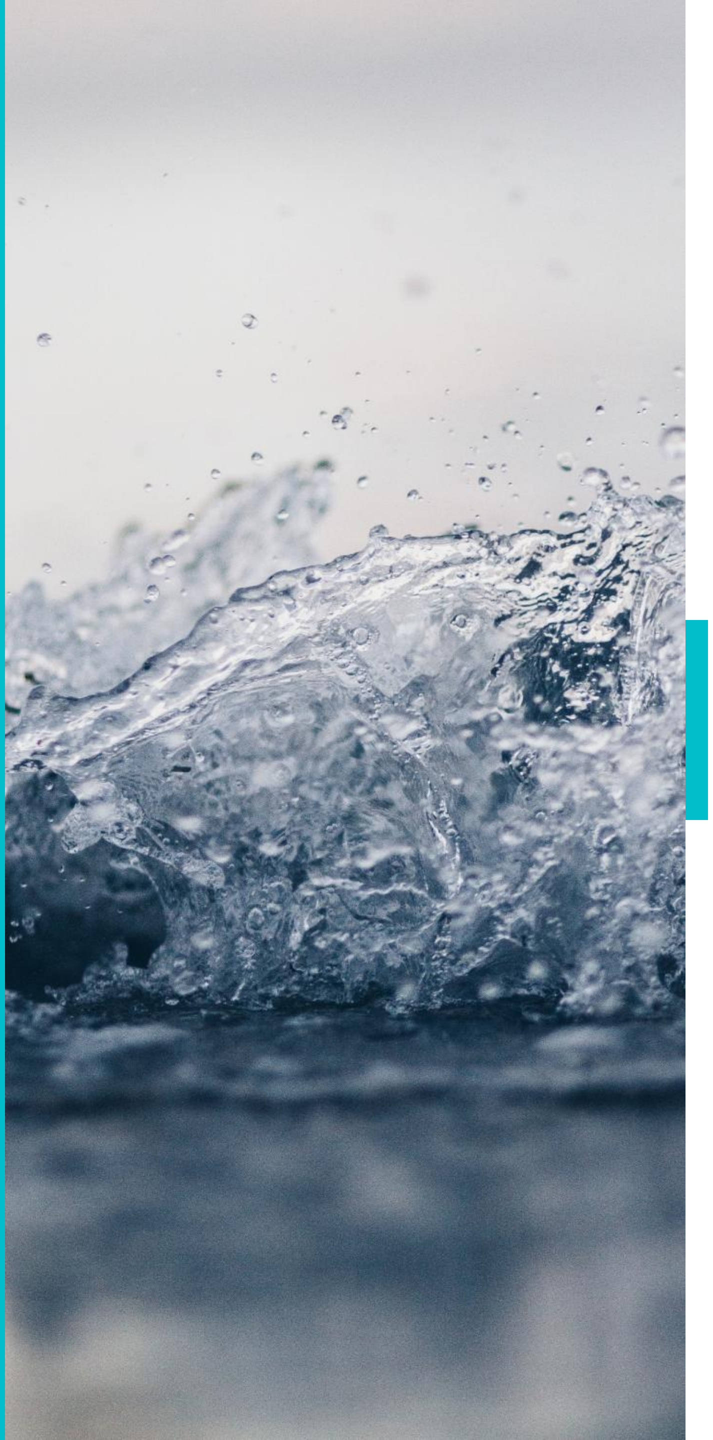
FY26 Results Overview



02

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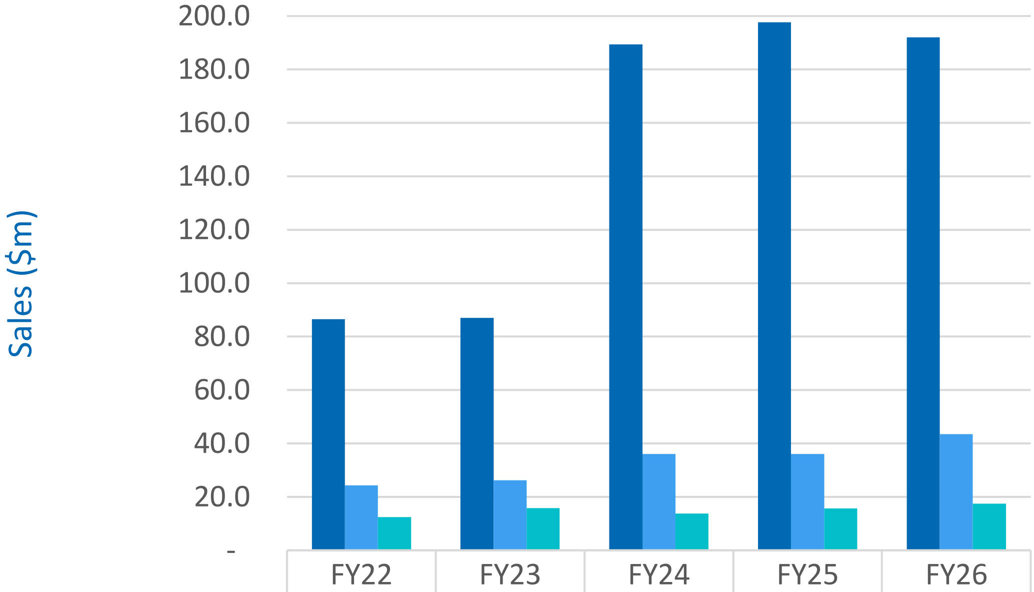
Group Sales Growth

Group Sales by Region

Sales Growth by Segment (Region)

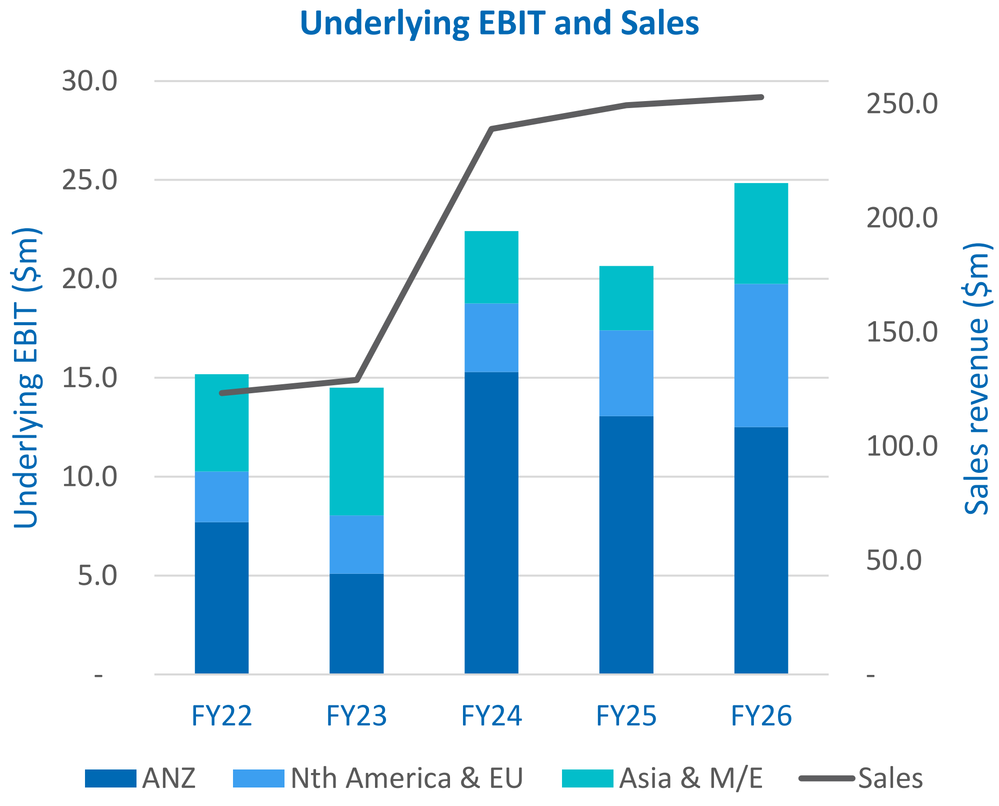


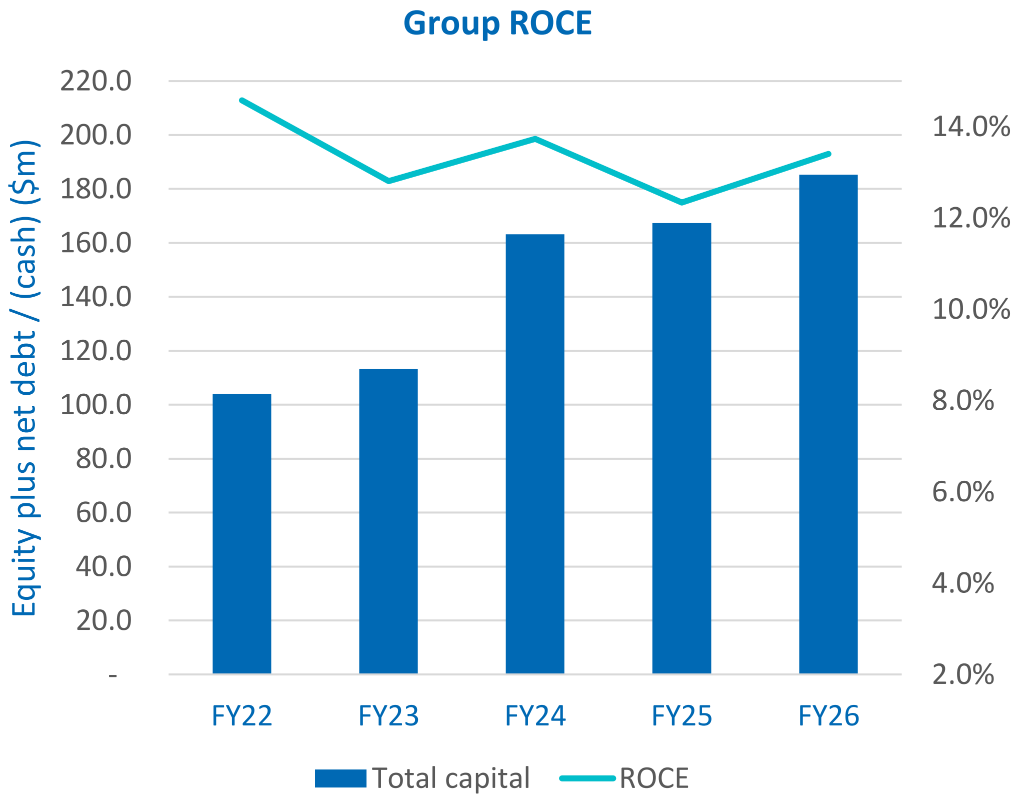
	FY22	FY23	FY24	FY25	FY26
ANZ	86.5	87.0	189.4	197.6	192.0
Nth America & EU	24.3	26.2	36.0	36.1	43.5
Asia & M/East	12.4	15.8	13.7	15.7	17.4

- **Group Sales Performance** – Sales rose 1% to $253.0 million as international growth offset a softer ANZ result, lifting international sales to 24% of the Group from 21%.
- **ANZ** – Sales declined 3% to $192.0 million on European supply realignment and temporary stock constraints during the Malaysian transition, now secured. Swimart and Davey grew.
- **North America & Europe** – Sales grew 21% to $43.5 million, led by North America where commercial applications and custom pressure vessels drove growth despite tariffs. Europe was steady.
- **Asia & Middle East** – Sales grew 11% to $17.4 million with Middle East operations commencing. Asian demand was steady on subdued regional capital flows.
- **Outlook** – With ANZ supply secured, international expansion and innovation are expected to support growth, though the Group remains mindful of economic uncertainty.

Group Performance

Group sales, EBIT and ROCE[1]





1. Refer to the Appendix for further information on Non-IFRS financial measures.

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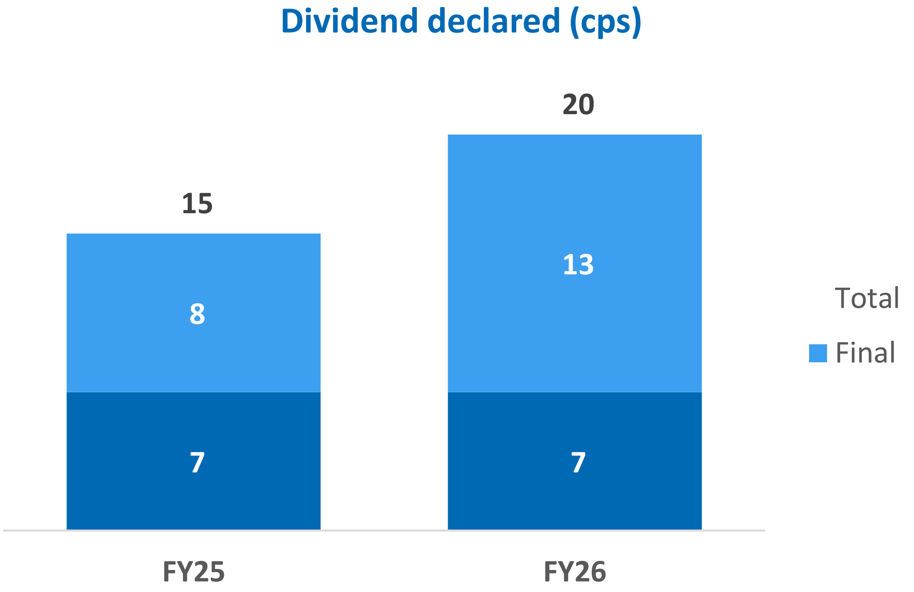
Capital Management



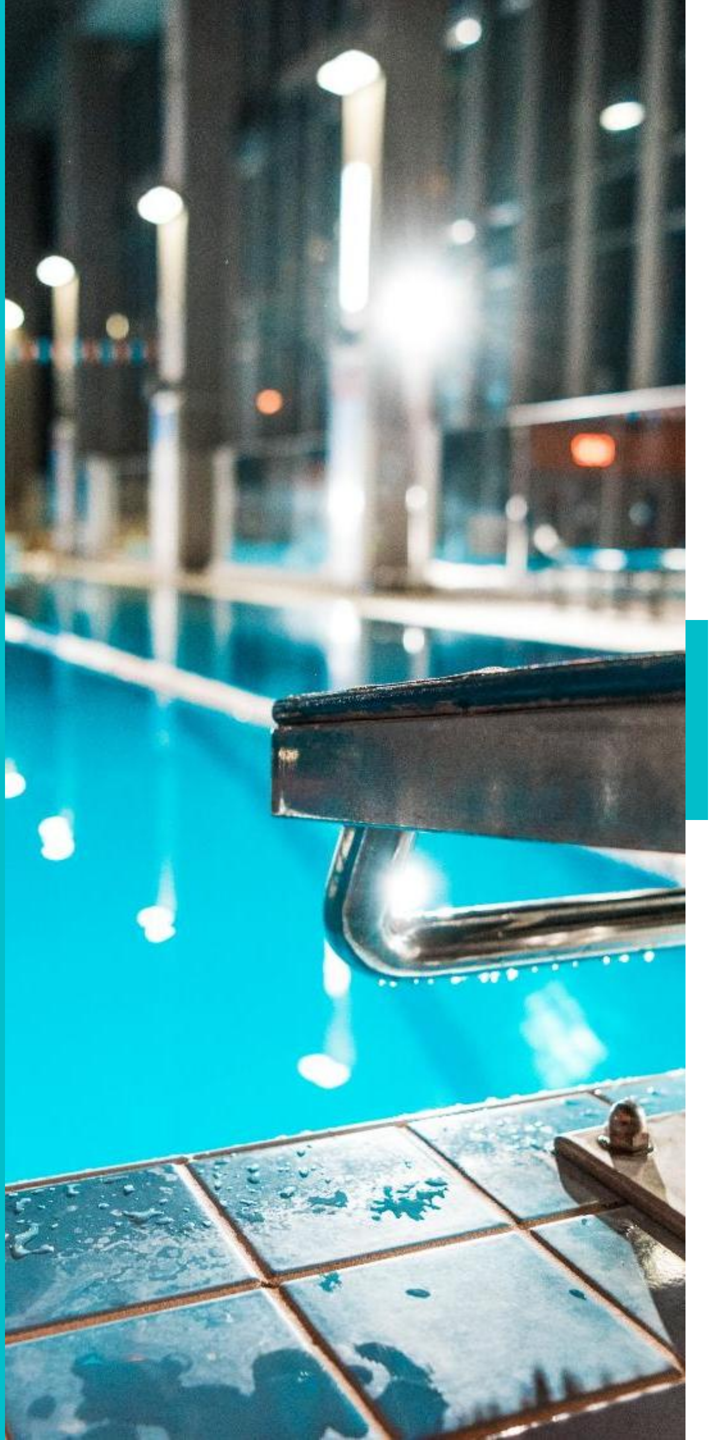
Gearing ($ million)	FY26	FY25
Total bank debt	51.7	49.2
Less cash and cash equivalents	(20.4)	(24.5)
Net Debt / (Net Cash)	31.3	24.7
Total equity	154.1	142.6
Total capital	185.3	167.3
Gearing ratio	**20%**	**17%**

1. Net debt excludes lease liabilities.

Highlights

- **Improved shareholder returns** – Dividend increased to 20 cents per share fully franked, with $0.7 million returned through the on-market buyback.
- **Balance sheet** – Net debt increased $6.5 million to $31.3 million, with gearing at 20% (FY25: 17%), reflecting investment in capacity.
- **Refinancing** – Westpac facilities refinanced in April 2026 and increased to $52.25 million, with $40.0 million drawn and termed to three and five years.
- **Investment in capacity** – Capital expenditure of $8.6 million (FY25: $3.0 million), including $6.4 million in Asia.
- **Capital priorities** – Funding Malaysian capacity expansion, managing gearing and continued dividends to shareholders.

FY26 Financial Summary



03

Statement of Profit or Loss

Profit or Loss	FY26 $000	FY25 $000
Sales revenue	252,976	249,443
Other revenue	6,372	5,491
Changes in inventories	(3,182)	1,618
Raw materials and consumables used	(125,403)	(131,012)
Employee benefits expense	(55,563)	(55,295)
Depreciation, impairment and amortisation	(12,052)	(12,532)
Finance costs	(4,474)	(4,631)
Advertising expense	(4,696)	(5,685)
Outward freight expense	(6,564)	(6,945)
Rent expense	(2,158)	(1,933)
Research and development	(2,382)	(2,907)
Insurance – general	(2,012)	(2,136)
Warranty expense	(822)	(2,368)
Commission expense	(489)	(493)
Foreign exchange (losses)/gains	(967)	(2,487)
Other expenses	(19,127)	(15,936)
Profit before income tax expense	19,457	12,192
Income tax benefit/(expense)	(4,097)	(2,561)
Profit for the period	**15,360**	**9,631**
EPS (cents)	*44.0*	*27.2*
DPS (cents)	*20*	*15*

Highlights

- **Revenue** – Group revenue up 2% to $259.3 million and sales revenue up 1% to $253.0 million.
- **Earnings** – Statutory EBIT up 42% to $23.8 million and underlying EBIT up 20% to $24.8 million.
- **Cost discipline** – Raw materials down $5.6 million, warranty down $1.5 million and advertising down $1.0 million, partly offset by $3.2 million higher other expenses.
- **Foreign exchange** – Translation losses reduced from $2.5 million to $1.0 million after the treasury restructure.
- **Profit** – Net profit after tax up 59% to $15.4 million, with the effective tax rate steady at 21%.
- **EPS and dividend** – EPS of 44.0 cents (FY25: 27.2 cents); dividend increased to 20 cents fully franked.

Statement of Financial Position

Balance Sheet	FY26 $000	FY25 $000
Cash and cash equivalents	20,424	24,522
Trade and other receivables	33,448	33,466
Inventories	99,227	92,661
Other current assets	5,801	6,607
Total Current Assets	158,900	157,256
Property, plant & equipment	84,678	71,583
Right of use assets	33,534	31,475
Intangible assets	1,123	1,173
Deferred tax assets	2,030	2,756
Total Non-Current Assets	121,365	106,987
Total Assets	280,265	264,243
Trade and other payables	26,079	25,965
Borrowings	4,434	7,200
Lease liabilities	8,777	8,474
Other current liabilities	7,651	9,493
Total Current Liabilities	46,941	51,132
Borrowings	47,240	42,025
Lease liabilities	26,934	24,653
Other non-current liabilities	5,081	3,790
Total Non-Current Liabilities	79,255	70,468
Total Liabilities	126,196	121,600
Net Assets	**154,069**	**142,643**
Total Equity	**154,069**	**142,643**

Highlights

- **Stronger balance sheet** – Net assets $154.1 million and net tangible assets $4.31 per share (FY25: $3.94).
- **Refinancing** – Westpac facilities refinanced in April 2026 and increased to $52.25 million, with $40.0 million drawn, maturing in three and five years.
- **Debt and gearing** – Net debt increased $6.5 million to $31.3 million, with gearing at 20% (FY25: 17%).
- **Property, plant and equipment** – Up $13.1 million to $84.7 million on capital expenditure and a $5.2 million revaluation increment.
- **Inventories and cash** – Inventories up $6.6 million to $99.2 million; cash $20.4 million (FY25: $24.5 million).

1. Net debt excludes lease liabilities.

Statement of Cash Flows

Cash Flows	FY26 $000	FY25 $000
Cash Flows from Operating Activities		
Receipts from customers	275,234	276,800
Payments to suppliers and employees	(252,933)	(249,446)
Interest received	102	77
Other Income	566	995
Finance costs	(3,058)	(3,287)
Income tax paid	(5,577)	(3,991)
Net cash provided by operating activities	14,334	21,148
Cash Flows from Investing Activities		
Payment for property, plant & equipment	(8,597)	(3,041)
Proceeds from sale of property, plant & equipment	56	216
Net cash (used in)/provided by investing activities	(8,541)	(2,825)
Cash Flows from Financing Activities		
Proceeds from bank borrowings	10,557	6,623
Share buyback	(685)	-
Repayment of bank borrowings	(8,033)	(8,066)
Dividends paid	(5,266)	(5,275)
Other	(5,586)	(4,855)
Net cash (used in) financing activities	(9,013)	(11,573)
Net (decrease) / increase in cash held	(3,220)	6,750
Cash at beginning of the year	24,522	16,802
Exchange rate adjustments	(878)	970
Cash and cash equivalents the end of the year	**20,424**	**24,522**

Highlights

- **Operating cash flow** – Decreased to $14.3 million (FY25: $21.1 million) on higher income tax paid than expensed and an inventory build.
- **Capital investment** – Capital expenditure of $8.6 million (FY25: $3.0 million), largely Malaysian manufacturing capacity.
- **Shareholder returns** – Dividends of $5.3 million paid and $0.7 million of shares bought back on-market.
- **Cash position** – Borrowings drawn $10.6 million and repaid $8.0 million, with year-end cash of $20.4 million (FY25: $24.5 million).

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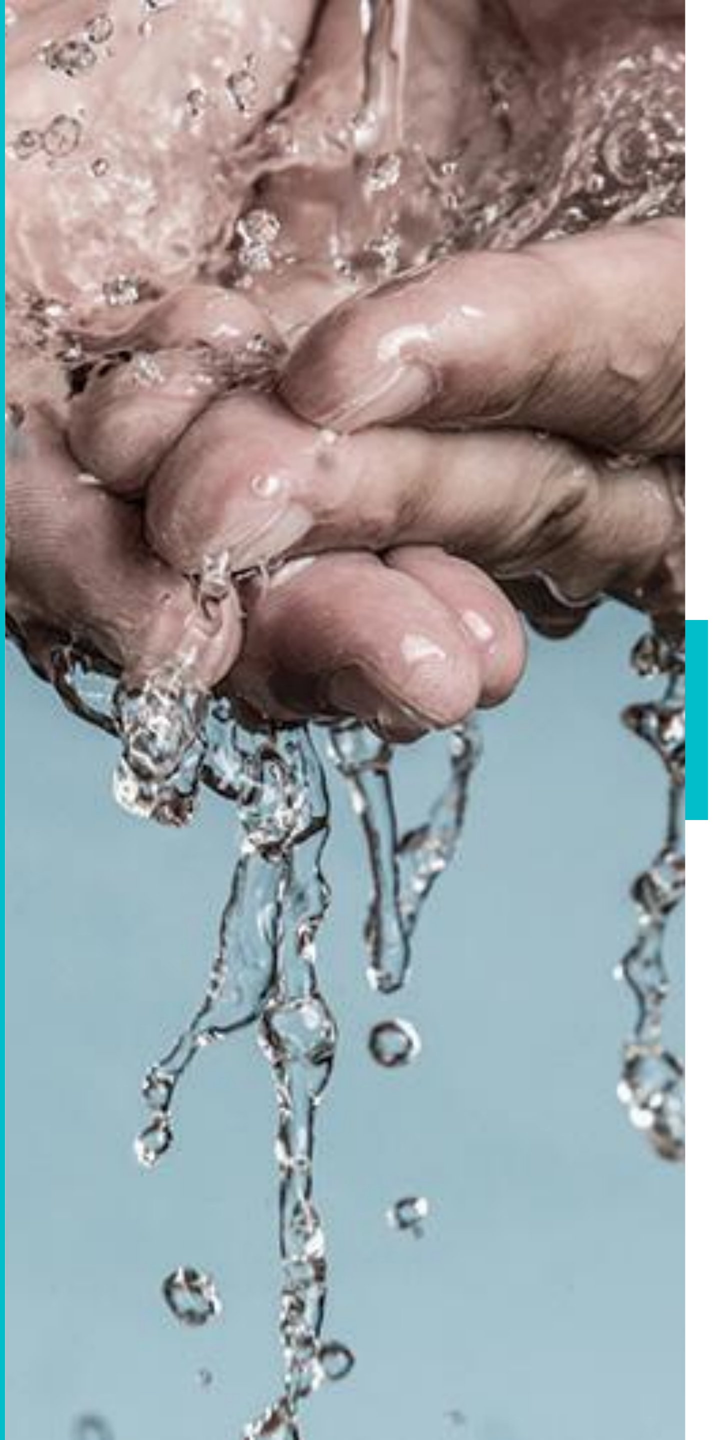
Company overview



04

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Our Business

Waterco is a vertically integrated water technology group that designs and manufactures innovative filtration and sanitisation solutions for swimming pools, spas, aquaculture, and water treatment and transfer markets.

POOL & SPA

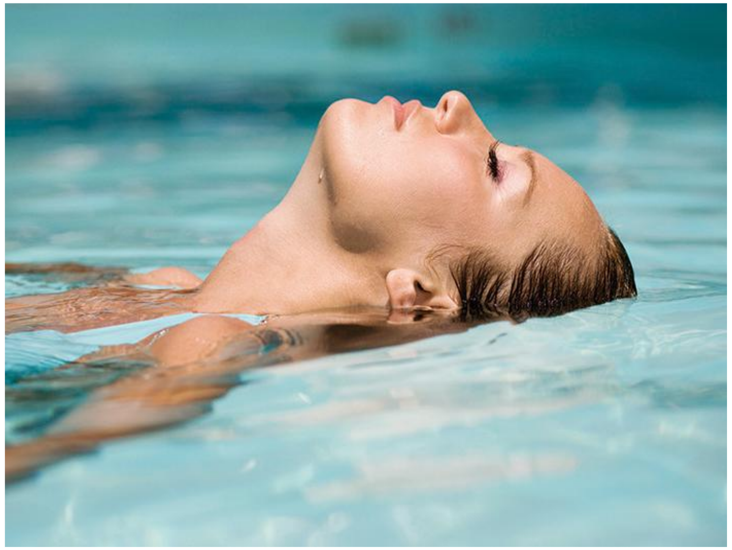
- Wide range of products, including chemicals for swimming pools and spas.
- Owner of the Swimart franchise, which features pool stores and mobiles in ANZ.

TRANSFER (PUMPS)

- Pumping solutions to transfer water with ease and dependability.
- Owner of Davey Water, a trusted brand and leader in the pump industry.

TREATMENT (FILTRATION)

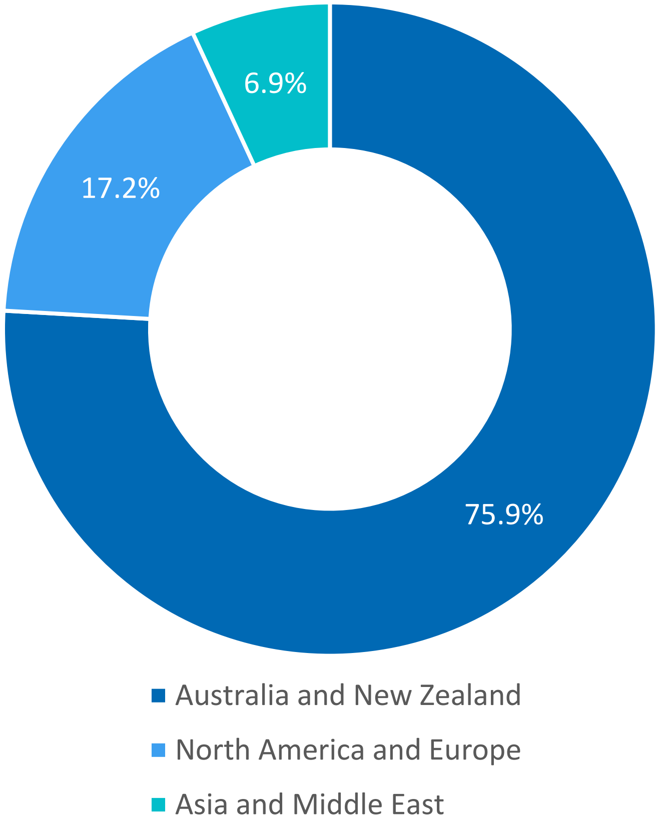
- Waterco offers filtration and sanitisation solutions for all types of applications.
- Waterco's Micron fibreglass filters are considered some of the largest in the commercial market today.



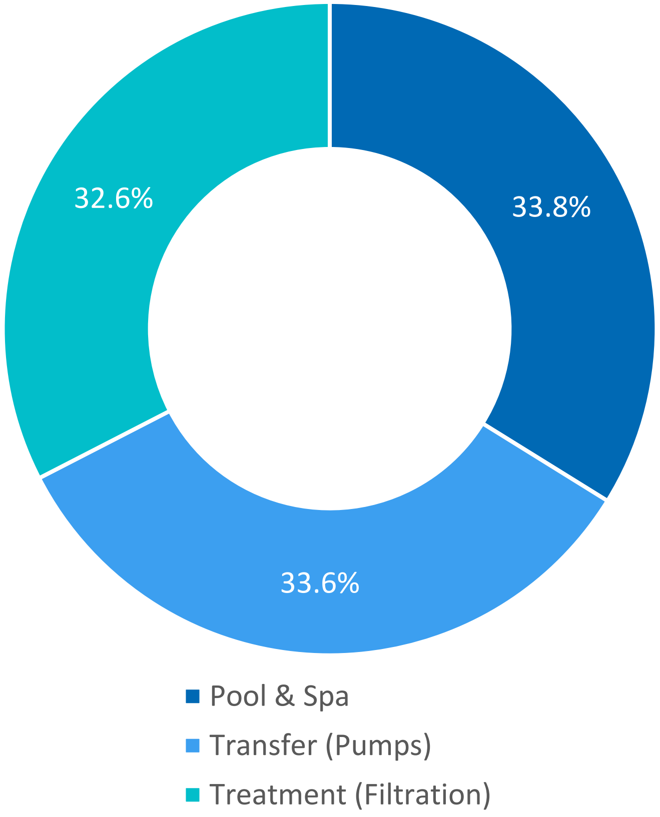
Waterco At A Glance

Recognised for quality manufacturing, technical expertise, and continuous product innovation across pumps, filtration, and water treatment solutions.

SALES BY REGION (SEGMENT)



SALES BY PRODUCT VERTICAL



Revenue Growth

- **ANZ Leadership** – The majority of Group revenue is generated in ANZ, supported by a broad and diversified product portfolio. The Group's strategy is to build a leading vertically integrated position in the fragmented pool market.
- **Davey Integration** – Davey enables strengthened market share by expanding the product range and opening new distribution channels across residential, rural, and commercial markets.
- **International Growth** – Waterco intends to increase scale in North America, Europe & Middle East with targeted partnerships and expanded distribution networks.
- **Asian Platform** – The Group's established manufacturing base in Malaysia underpins cost efficiency and provides a springboard for broader growth.

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Our Brand Strength

Waterco

- Waterco's innovative filtration and sanitisation solutions, driven by engineering strength and robust manufacturing, have solidified our leadership in the water treatment industry, especially for commercial applications demanding unwavering reliability and performance.
- ASX Listed with a strong domestic and global presence.

Davey

- Davey is the leading manufacturer of residential and commercial pumps in Australia.
- Trusted brand, born in Australia in 1934.
- Dependable products and strong relationships with Australian dealers (multi-generational).

Swimart

- Established in 1983, Swimart is focused on making pool care easy, with 71 retail stores and 6 mobile franchises – 77 locations in total across Australia and New Zealand.
- With over 40 years of industry expertise, Swimart is a trusted brand in the Australian and New Zealand pool and spa industry.

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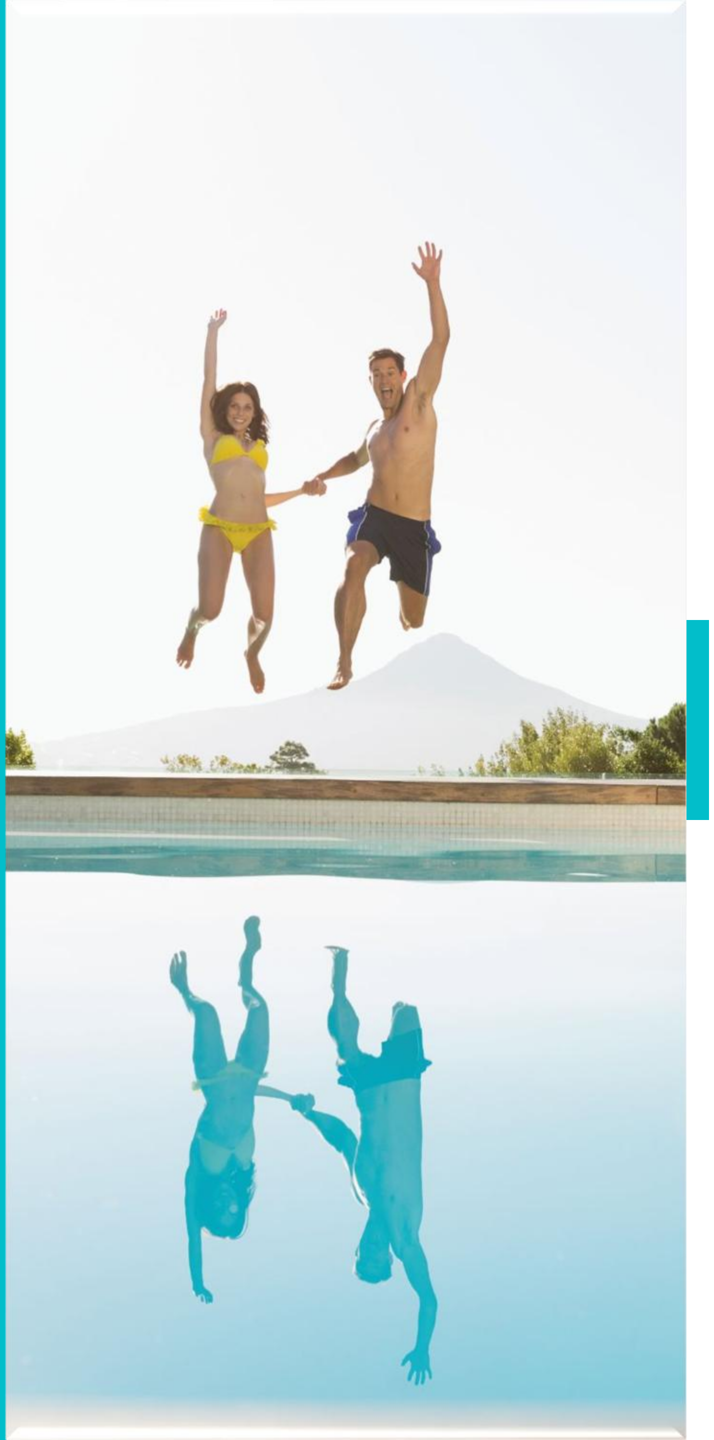
DEPEND ON
DAVEY
WATER PRODUCTS

Swimart 40
Celebrating 40 years of pool care

Growth Strategy



05

Growth Strategy – by Vertical and Region

POOL & SPA

- Swimart to increase franchise footprint with further independent conversions and potential acquisitions.
- Davey Pools to increase penetration of independent sales channels in highly fragmented market.
- Increase connected technology products.

TRANSFER (PUMPS)

- Leverage trusted brands and innovate next generation energy efficient products.
- Develop new partnerships across Group's distribution channels to capture market share.
- Address water efficiency demand in rural ANZ and Asia with premium products.

TREATMENT (FILTRATION)

- Differentiate Waterco's superior commercial filters to capture greater market share across various sectors.
- Drive repeat business from 'stickiness' of engineered/bespoke product suite.
- Meet rising demand for premium water safety products.

ANZ

- Refine and implement a Go-To-Market Sales & Service Model using advanced systems and expanded networks to increase market share in key territories.
- Enhance data intelligence in industrial, commercial, and consumer connected services to increase transaction values.

NTH AMERICA & EUROPE

- Dominate commercial filtration by leveraging Waterco's position as one of the few market participants, in areas like aquatic centres.
- Expand market share in home pressure systems, firefighting equipment, and pool products through new channels.

ASIA & MIDDLE EAST

- Capitalise on positive demographic trends and surging demand for pool products and clean water solutions in the home.
- Establish regional branches close to manufacturing hubs, enabling efficient delivery of innovative solutions.

Long-Term Growth

Waterco is strategically positioned to generate significant and sustained long-term growth.

Tailwinds and Trends

- Energy efficiency regulations
- Health and wellness awareness
- Environmentally sustainable products
- Technology innovations and IoT adoption
- Favourable demographic and investment trends
- Water safety
- Water scarcity

Industry Drivers

- Connected products, product monitoring and maintenance / predictive capabilities
- Recycling water (domestic and industrial)
- Water conservation systems
- Annuity like demand
- Consistent sector growth
- Growing demand for premium products

Our Competitive Advantages

Largest Australian-owned manufacturer of water transfer and water treatment products – combination of the best filters and the best pumps, with the best technology.

Manufacturing Expertise

- Leading R&D / product development capability with speed to market.
- Expertise accelerates innovation and fosters the development of premium differentiated products.
- Manufacturing plants in Australia and Asia.

Market Leadership

- Waterco's and Davey's combined presence delivers a broader international footprint and stronger market leadership.
- Waterco's established presence in the Australian metropolitan pool and spa markets complements Davey's comprehensive coverage of regional Australia.

Product Mix

- The combined Waterco and Davey product range offers a one-stop shop for comprehensive water management, a significant competitive advantage.
- Cross-selling and up-selling across both customer bases.

Vertical Integration

- Waterco vertically integrates its operations by controlling both the manufacturing and distribution of its products.
- As well as the franchisor of the Swimart retail network for distribution in Australia and New Zealand.

Proprietary Technology

- Waterco's pool equipment innovations and Davey's proprietary water treatment technologies combine to create a powerhouse of intellectual property in the water management industry.

Outlook

06

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Key trends shaping the industry present exciting opportunities

Water scarcity

- Demand for fresh water increasing, supply at risk
- Water re-use, conservation, ESG

Energy efficiency

- Increased energy efficiency regulations (EU / USA / ANZ)
- Climate consciousness

Smaller, better quality

- Smaller pools in smaller yards with premium products

Connected products

- Demand for smart, connected products
- App integration
- Product monitoring, predictive maintenance

Home & health

- Increased health consciousness

...we are seizing these opportunities to scale and grow with our customers

FY27 Outlook and beyond

Margin and Earnings Focus

- Lifting the EBIT to sales ratio through closer management of sales growth and margins
- A disciplined approach to overheads across the Group
- Warehouse consolidation savings to flow through from FY27

Growth Opportunities

- Significant growth opportunities in ANZ with the supply chain migration secured
- European distribution alliance to support growth in that market
- Further upside in the Middle East as conditions stabilise

Investment and Capacity

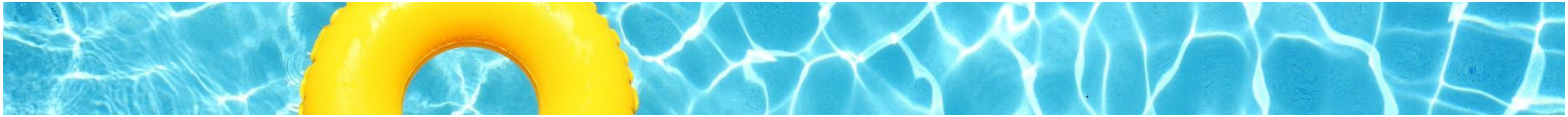
- New products and distribution platforms rolling out across the Group
- Malaysian capacity expansion progressing, with greater supply chain resilience

Capital Management

- Gearing at a satisfactory level after refinancing, with capital allocation balanced between growth and shareholder returns

Outlook

- Confident in the trajectory toward improved long-term profitability, mindful of the economic environment



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Appendix

07

Key Metrics and Definitions

Reconciliation to FY26 reported earnings

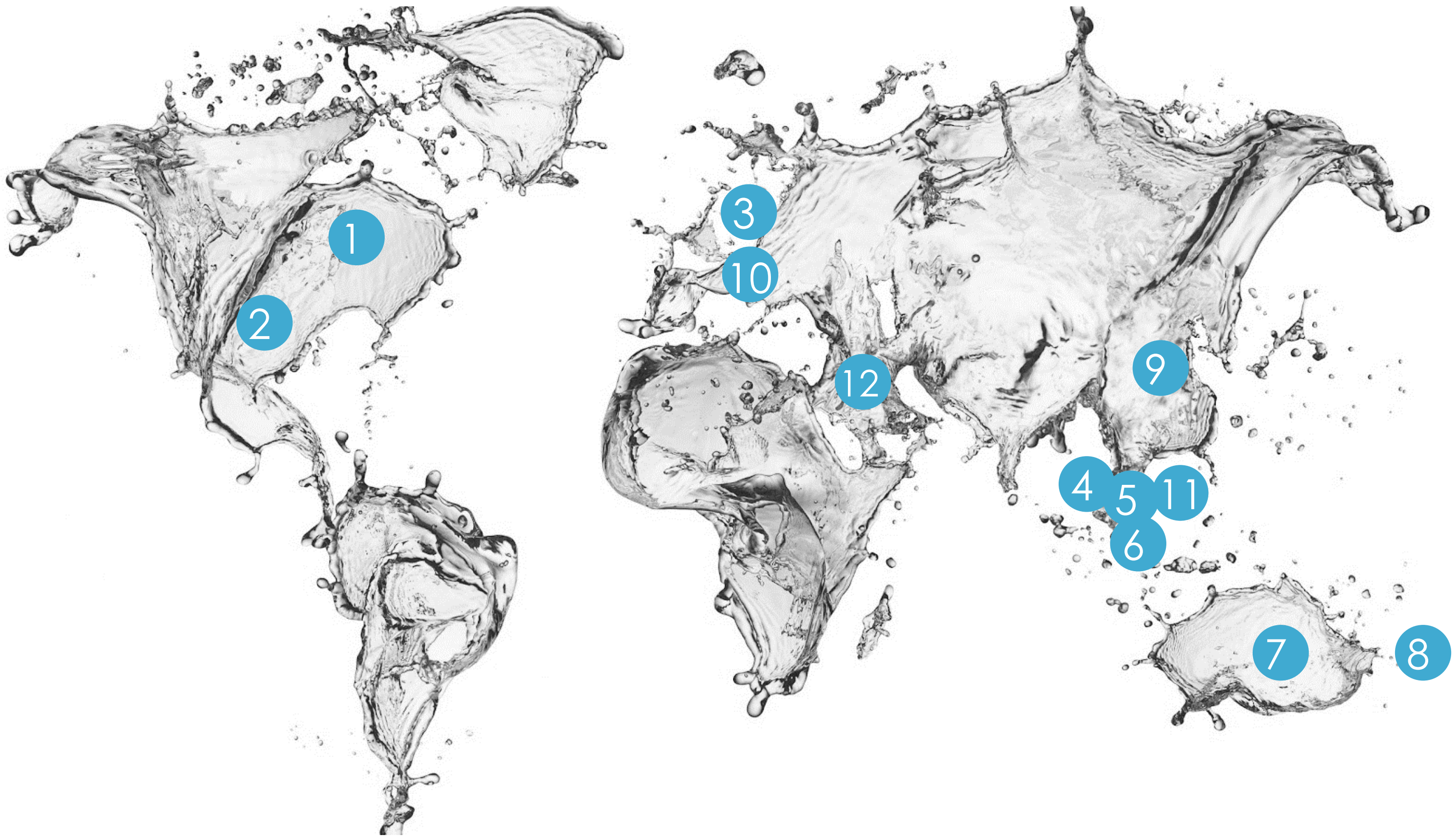
	Metric ($ million)	FY26	FY25	% Change
Reported	EBIT	23.8	16.7	42%
	NPBT	19.5	12.2	60%
	NPAT	**15.4**	**9.6**	59%
	EPS (cents)	44.0	27.2	62%
Adjusted	Depreciation, impairment & amortisation	(12.1)	(12.5)	
	EBITDA ($ million)	35.9	29.3	23%
Add/(deduct) non-recurring items	Foreign exchange losses/(gains)	-	2.5	
	Restructuring and transformation costs	1.0	1.4	
	Tax benefit	(0.3)	(1.2)	
Underlying	Underlying EBITDA	36.9	33.2	11%
	Underlying EBIT	24.8	20.6	20%
	Underlying NPBT	20.5	16.1	27%
	Underlying NPAT	**16.1**	**12.4**	30%
	Underlying EPS (cents)	46.0	35.2	31%

Group definitions

EBITDA	Reported EBIT adding back depreciation, impairment and amortisation expense.
Foreign exchange losses/(gains)	FY25 included translation losses on the wind-up of legacy intra-group balances during the treasury restructure. Following its completion, foreign exchange movements are treated as ordinary course and are not adjusted in FY26.
Gearing	Net debt as a percentage of total equity.
Net debt	Total borrowings (calculated on a pre-AASB16 Leases basis) less cash and cash equivalents.
Net working capital	Inventory plus debtors less creditors.
Restructuring and transformation costs	One-off costs associated with restructuring and transformation initiatives across the Group. FY26 costs mainly relate to warehouse consolidation, implementation of the new IT platforms and related advisory support. FY25 costs related to the Davey integration and Group treasury restructuring, a narrower scope than FY26.
Return on capital employed	Underlying EBIT as a percentage of shareholders equity plus net debt.

Underlying items reflects statutory profit as adjusted to reflect the Directors' assessment of the result for the ongoing business activities of the Group, in accordance with AICD principles of recording underlying earnings. Underlying profit measures have not been audited. Certain prior-period comparatives may be adjusted to ensure consistency across periods for underlying adjustments.

Global Presence



Waterco exports its products to over 40 countries via its branches in Australia, New Zealand, China, Malaysia, Singapore, Indonesia, Vietnam, United Kingdom, France, USA, Canada and UAE.

Planned expansion of Malaysian manufacturing base to service future growth anticipated for North America and Europe.

1. CANADA
Longueuil, Sales and Distribution.

2. USA
Augusta, Warehousing,
Sales and Distribution.

3. UK
Kent, Warehousing,
Sales and Distribution.

4. MALAYSIA
Kuala Lumpur Research and Development,
Manufacturing, Warehousing, Sales and Distribution.

5. SINGAPORE
Sales and Distribution.

6. INDONESIA
Jakarta Warehousing, Sales and Distribution.

7. AUSTRALIA
Sydney (Head Office), Brisbane, Melbourne, Adelaide, Perth Research and Development, Warehousing, Sales and Distribution.

8. NEW ZEALAND
Auckland Warehousing, Sales and Distribution.

9. CHINA
Guangzhou Chemical Packing, Warehousing, Sales and Distribution, Research and Development.

10. France
Lyon, Warehousing,
Sales and Distribution.

11. Vietnam
Sales and Distribution.

12. UAE
Dubai Warehousing, Sales and Distribution.

WATERCO
water, the liquid of life

Sustainability and ESG

Sustainability and ESG

Waterco continues to grow its Sustainability efforts and commitment to ESG.

In its manufacture and distribution of water solution products, ESG principles are inherently practiced. Key initiatives include:

- Investment in renewable energy technologies to transition from coal-generated electricity to solar power.
- Roadmap underway for mandatory climate-related financial disclosures under Australian Sustainability Reporting Standard S2, applying to the Group from FY27.
- Recognition for sustainability excellence, including Davey's 6-star energy rated pump, awarded in the Pool and Spa industry.
- Offering an extensive range of Climate Care Certified pool equipment, empowering pool owners to achieve optimal environmental sustainability (see opposite).

Climate Care Certified Opportunity

The Climate Care Certification Program is an initiative of the Swimming Pool & Spa Association of Australia Ltd (SPASA Australia).

Waterco has established itself as the go-to resource for pool and spa owners seeking sustainable solutions. This reputation enabled the company to effectively promote and sell Certified Pool Pads, Products, and Systems.

Waterco's association with Climate Care Certified provided the company a significant edge over its competitors. This certification positions Waterco as a responsible and socially conscious organisation that prioritises environmental well-being.

CLIMATE CARE CERTIFIED

THE NEW BENCHMARK IN ENVIRONMENTAL SUSTAINABILITY FOR SWIMMING POOLS & SPAS

Summary

Leading Company

Largest Australian-owned (ASX listed) manufacturer of water transfer and water treatment products with an extensive ANZ network and a growing global presence.

Competitive Advantages

Manufacturing powerhouse with strong brands, product diversification, vertically integrated operations and a focus on technology and innovation.

Attractive Industry

The Group is well positioned in an industry experiencing strong tailwinds, consistent growth, favourable demographic trends, and positive industry drivers.

Pathway To Scale

Clear organic growth opportunities combined with demonstrable success in acquisition ability and future potential for inorganic expansion.

Strong Financials

Improved earnings and margins from an integrated Group, with an increased fully franked dividend.

ESG Alignment

In the manufacture and distribution of water solution products, ESG principles are inherently integrated, together with product awards for sustainability excellence.

WATERCO
water, the liquid of life

Head Office

36 South Street, Rydalmere, NSW 2116 Australia

+61 2 9898 8600

Investor Enquiries:

Waterco

companysecretary@waterco.com

Innovera Partners

info@innoverapartners.com