Sustainable Growth

Leading UK only construction group, listed on the FTSE 250, carrying out major building and infrastructure projects.

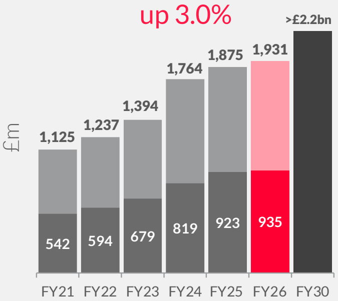
Scan for reports and presentations

FY26 revenue	FY26 divisional adjusted operating margin	FY26 adjusted profit before tax	Total Shareholder Returns (1 Jul 2020 to 31 Dec 2026)
£1.9bn	3.5%	£55.9m	413%
			TSR measures share price increase and dividend return on investment.

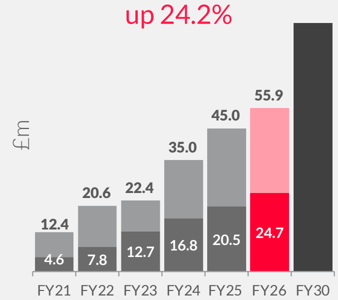
Key strengths

- Six years of sequential and profitable growth, with further progress expected in FY27.
- Divisional adjusted operating margin up to 3.5%, continuing good progression towards our 4.0% 2030 target.
- High-quality, record £4.3bn order book across public and private sectors giving excellent pipeline visibility, with 90% of FY27 and 62% of FY28 work already secured.
- Well positioned in non-cyclical markets, reinforced by strong Government support and major investment commitments.
- Disciplined approach to contract selection and rigorous risk management; underpinned by multi-stage contract negotiation.
- Resilient debt-free balance sheet, strong cash conversion.
- Well-established, long-term client and supply chain relationships.
- Well placed to benefit from Government and regulated spend in the UK's critical social and economic infrastructure.
- Confidence in delivering 2030 sustainable growth targets generating significant cashflows to support further post-dividend capital allocation optionality.

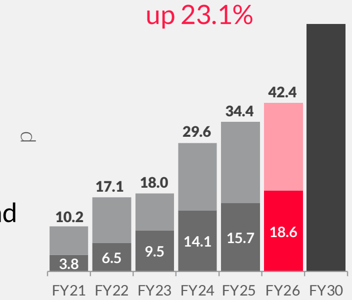
FY26 revenue up 3.0%



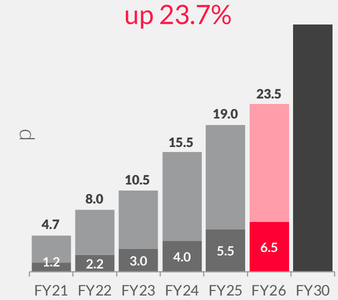
FY26 adjusted PBT up 24.2%



FY26 adjusted EPS up 23.1%



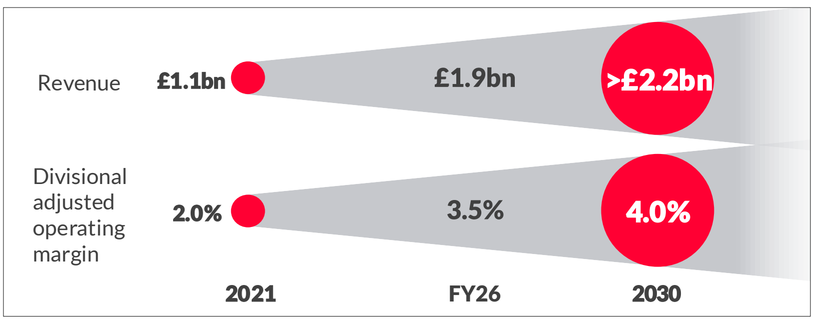
FY26 DPS up 23.7%



■ 2030 strategic growth targets (indicative).

Strategy to 2030

Grow revenue and margin in our three core businesses	Grow our specialist businesses in higher margin, adjacent markets	Re-enter the Affordable Homes market	Leverage our geographical and client footprint across the UK	Continue to grow earnings, capital allocation and returns



Growth via core markets

Building | Highways | Environment

Growth via adjacent markets

Private Rented Sector | Capital maintenance and asset optimisation | Affordable homes | Specialist Services

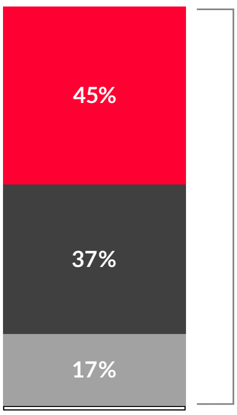
Risk management

Assessing and managing risks and uncertainties is the central element of our process and business strategy. Commercial control and rigorous risk management are an integral part of our strategy. We achieve this through our:

- Focus on margin improvement as we grow.
- Disciplined approach to project selection including:
  - → Ensuring appropriate terms and conditions for each project.
  - → Margin thresholds in line with targets.
  - → Peer reviews of bids and contract reporting.
  - → Board approval for all bids with specific risk factors or with a value of over £50m.
- Aligned and informed supply chain.
- Clear management reporting lines.

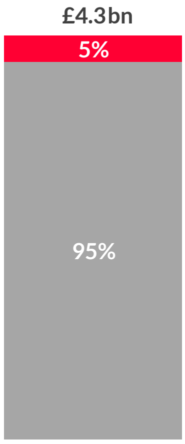
High-quality order book

Order book procurement



- Target/cost plus
- Two-stage
- Negotiated
- Single-stage (1%)

Order book by client type



- Private
- Public and regulated

Order book by sector

Building	Total £2.7bn
Defence	£711m
Custodial	£654m
Education	£605m
Commercial & other	£334m
FM	£333m
Health	£21m

Infrastructure	Total £1.7bn
Environment	£1,171m
Highways	£519m

92%
Repeat clients
(FY25: 93%)

90%
Work secured for FY27
(FY25: 99%)

62%
Work secured for FY28
(FY25: 75%)

91%
of our work is in frameworks
(FY25: 90%)

ESG

Scan for our full sustainability metrics

More information:

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linkedin.com/company/galliford-try-/
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