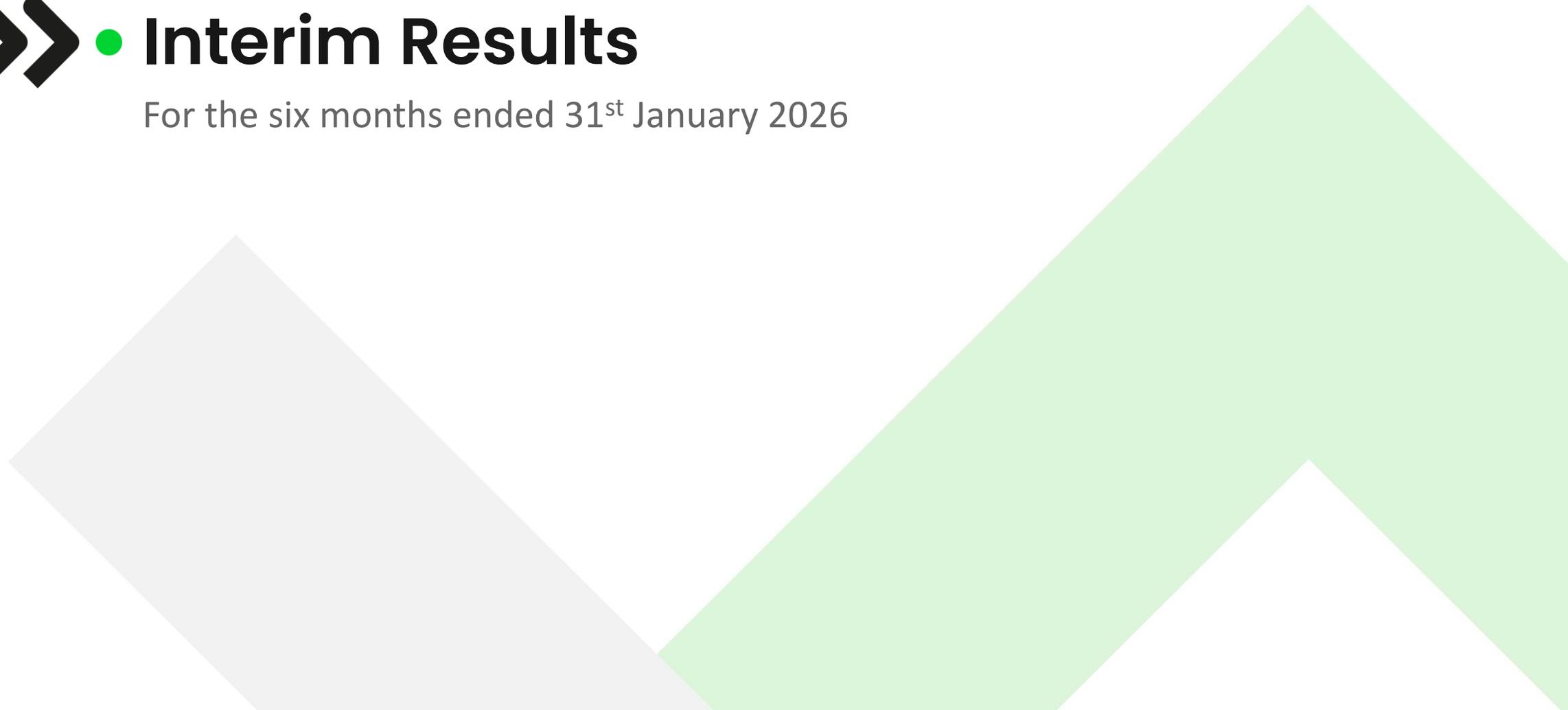


Three black chevrons pointing to the right, followed by a green dot.

Interim Results

For the six months ended 31st January 2026



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Presenting Today



Matt has been with Gattaca for 24 years and was appointed as CEO in April 2022. His previous roles within Gattaca included Chief Customer Officer and Group Business Development Director and has been a Senior Leadership Team member since 2016. He has substantial knowledge of the recruitment industry and a deep understanding of Gattaca.



Oliver was appointed to the Board as CFO in April 2022, having joined Gattaca in January 2018 as Group Director of Financial Planning. Oliver was previously UK Finance Director for Fitness First where he was instrumental in the transformation and return to growth between 2012 and 2018, prior to which he held a number of operational finance roles within Serco and IBM. Oliver trained and qualified as a chartered accountant with RSM Robson Rhodes.



Matt Wragg
CEO



Oliver Whittaker
CFO

Why invest in Gattaca?

1

Built to last

- STEM skills are in demand across all geographies and end markets, often supporting national critical infrastructure projects.
- 77% contract focused, providing stable recurring revenue and resilience.
- Clear multi service offering enabling growth within current and prospective clients.
- Modern global tech stack fully established across Group.
- Strong Group balance sheet.

2

A trusted reputation, well positioned to exploit high-growth markets

- Broad, diverse client base and long-term partnerships.
- Recognised brands of Matchtech, InfoSec People & Gattaca Projects in the provision of Engineering & Technology talent as well as workforce solutions & professional services.
- Proven ability to deliver tailored solutions and products.
- World-class technology and systems.
- Award winning business.

3

Leadership delivering on Strategic Priorities

- An experienced and diverse management team.
- Deeply embedded market-based expertise within the business.
- Focused headcount investment in high-growth markets such as Energy (Renewables), Defence, Technology and Mobility.
- Robust and effective cost management, returning the business to profitability.

4

Engaged business with a positive culture

- Strong levels of engagement at 8.4, well above peer comparison.
- High number of long standing high performing employees and track record of internal career progression.
- Core Values of Trust, Professional, Ambition and Fun underpinned and integrated into our quarterly performance management processes.



• Summary

Summary

Group NFI of £21.4m, an increase of 13% year on year ("YoY")

- Group like-for-like ("LFL") NFI of £20.4 million up 8% (2025 H1: £18.9 million).
- Infrastructure, the largest contributor to Group NFI (34%), pleasingly showed 6% growth with particularly strong growth within Water sector.
- Defence returned to YoY growth with a strong H1 delivering 29% YoY growth, reversing the decline 2025 H1, exceeding performance achieved in 2024 H1.
- Energy performed strongly with 13% YoY growth as our strategic investment continues to mature.
- Contract vs Statement of Work ("SoW") vs Permanent split 77% / 4% / 19% of Group NFI (2025 H1: 74% / 6% / 20%).
- LFL contract NFI up 15% YoY, with the positive momentum achieved in 2025 H2 continued in H1 2026
- LFL Permanent NFI down 4% YoY, management are cognisant that market conditions remain subdued.
- Gattaca Projects SoW revenue down 8% YoY, due to timing delays on major client programmes, activity expected to remain subdued in H2.



• Group continuing underlying PBT of £3.0m (31 January 2025: £1.0m) up 187% year on year, reflecting the Group continued to focus on operational efficiency and disciplined resource allocation, while maintaining investment in target sectors.



• Group net cash of £13m as at 31 January 2026 (31 January 2025: £16.8m) reflecting working capital requirements of contractor growth along with M&A expenditure and dividend payments.

Sector overview

Market overview

- Major employment legislation taking effect, including phased roll-out of the Employment Rights Act 2025 from Apr 2026. Further reforms continue through 2027
- HMRC Umbrella Company Reforms from April 2026 introduce joint and several liability
- Ongoing skills shortage in the UK, especially in STEM
- 726,000¹ job vacancies in the UK, lowest level in four years, resulting in less mobility in labour market
- Labour market continues to be business-led; high candidate availability, companies nervous of investing, candidates nervous to move



Infrastructure

% of UK
NFI²

34%

FY26 H1
performance

+6%

- Focused into Water, Highways & Rail
- Water AMP cycle creating sustained growth opportunities with capital spending forecast to rise by more than 80% over five years



Defence

19%

+29%

- Strong market position, access to over half of MoD's top 100 suppliers
- Rising defence spending and acute skills shortages continue to drive high talent demand



Energy

15%

+13%

- Investment in sales capability supporting strong performance in renewables, nuclear and transmission and distribution
- Ongoing grid investment and rising electricity demand continue to drive robust pipeline growth



Mobility

9%

+6%

- Return to growth following weaker period characterised by client hiring freezes and major client insolvency
- Increasing activity in MRO as aerospace backlogs persist



Digital Technology

8%

13%

- Large market, strong performance in contract recruitment within PMO / PM, data & AI and software development skillsets
- Ongoing permanent hiring challenges



Other

12%

+0%

- Commercial and Professional skills seeing some recovery in demand

Key initiatives delivered in 2026 H1

1

External Focus

- Consolidated recruitment brands into one powerhouse of Matchtech.
- Deployed our enhanced sales plan, increasing focus and giving the roadmap to become market leader.
- Completed the acquisition of InfoSec People to expand our Cyber & Security offering.
- Client feedback rating of 8.9 in 2026 H1, increased from 8.8 in FY25 and 8.8 in FY24.

2

Culture

- Winner of awards for culture and sustainability.
- People engagement score solid at 8.4 for 2026 H1 (FY25: 8.4).
- Prioritised improving peer-to-peer relationships as a key focus for 2026.

3

Operational Performance

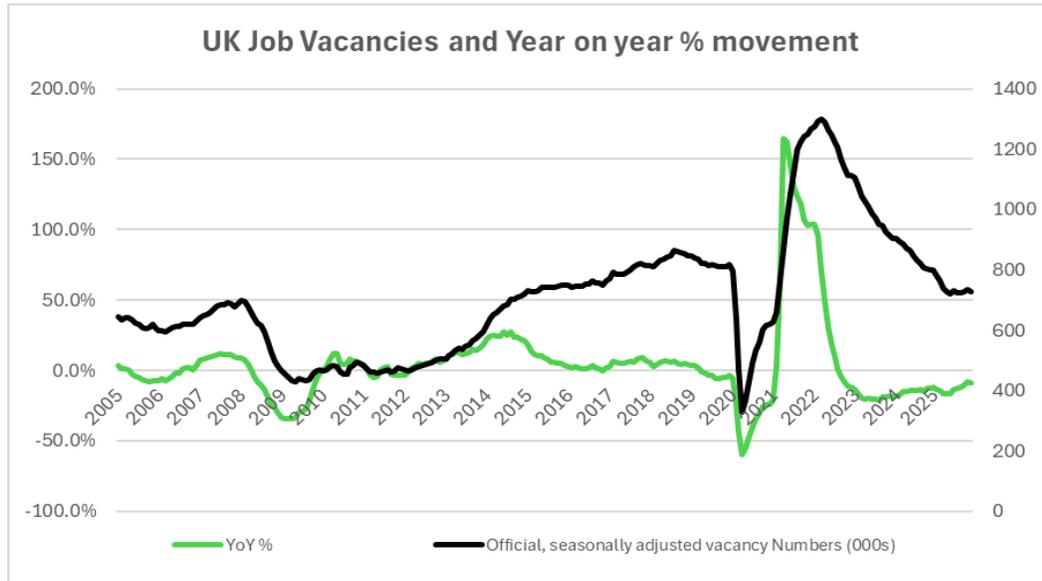
- Average NFI per sales head , and per total heads have both increased by 21% YOY.
- Achieved ISO27001 certification, strengthening our information security standards and reinforcing client trust.
- Created Matchtech AI and automations programme (MAIA) across front line sales and back-office customer experience and efficiency

4

Cost Re-balancing

- Maintained our ratio of sales to support at 31 January 2026, 71:29 (2025 H1: 71:29).
- Invested in further automation and AI to enhance customer journey and speed to onboard.

Labour market trends



Source: ONS data

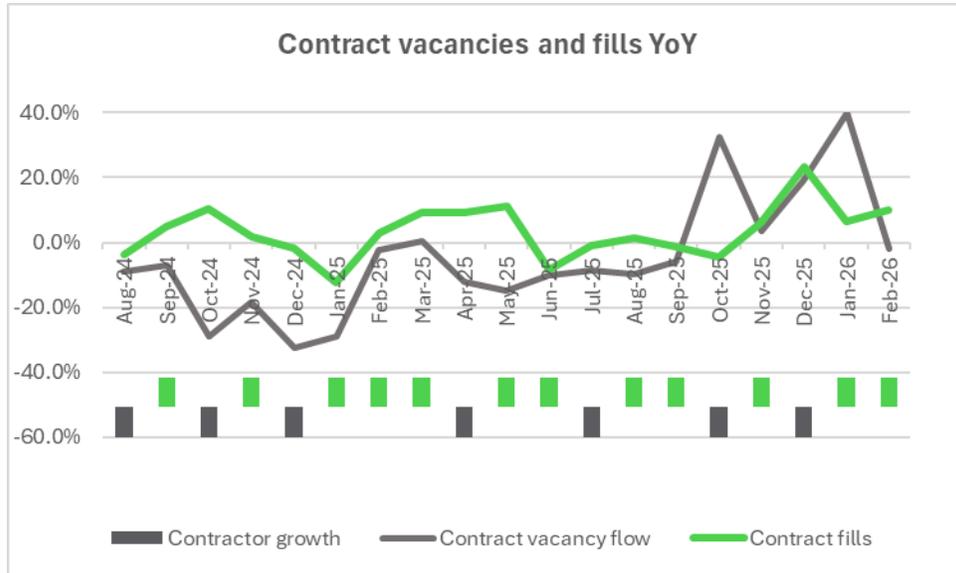
- Latest data from the Office for National Statistics (ONS) indicated a further fall in the number of vacancies during the three months to January 2026. It was the thirty-ninth consecutive period that a quarterly decline has been registered.
- The overall number of vacancies was at 726,000, down 73,000 (9.1%) from a year ago.



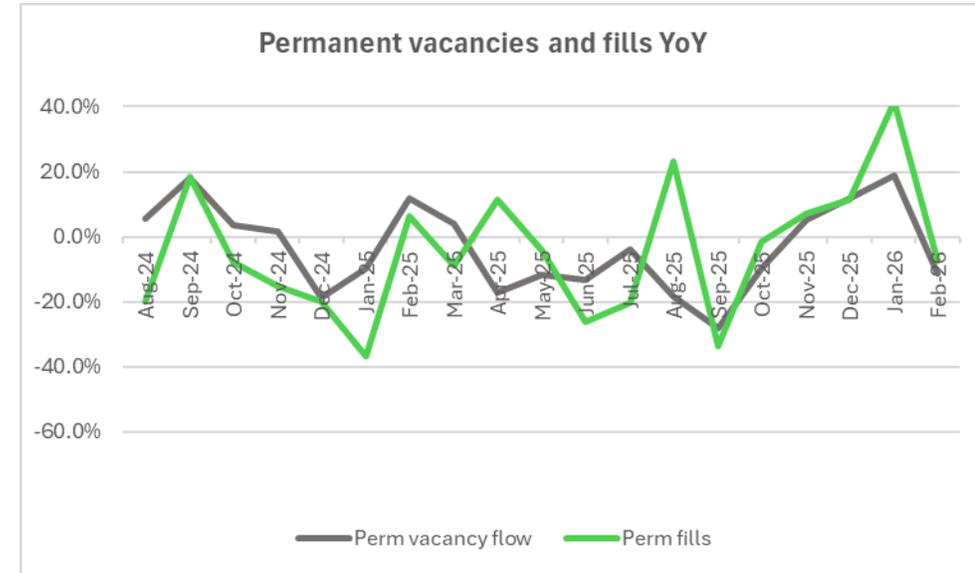
Source: KPMG and REC report on jobs, February 2026

- KPMG and REC reported in February 2026 that both permanent placements and temporary billings remained in negative territory.
- The permanent hiring market remains weak but is showing early signs of recovery as declines are narrowing.

Gattaca vacancy and fill trends



- Contract vacancy flow rates have increased by 11% on HI 2026
- Despite this, our level of contract fills has remained consistent, up 5% in HI 2026 and enabling us to achieve contractor growth
- Contractor volume growth achieved in 4 of last 6 months



- Perm vacancy flow rates down 5% on average YoY during HI 2026
- Perm fill rates have matched the vacancy rates, up 4%.
- Average perm fees flat YoY



• Financial Results

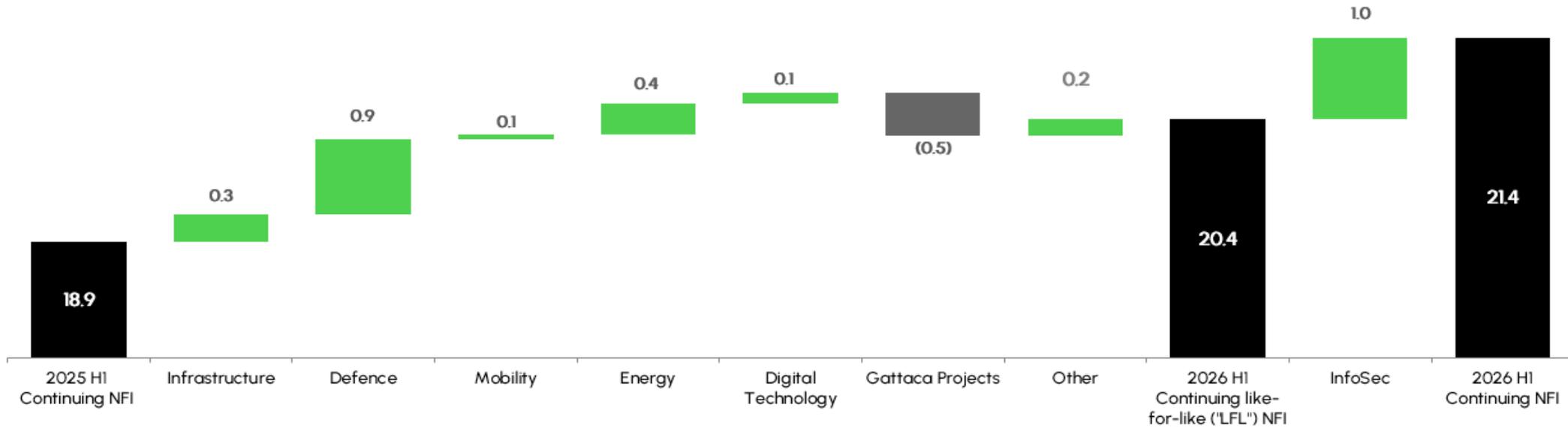
Continuing Group NFI by sector

Net Fee Income (NFI) £'m	2026 H1	2025 H1 <i>(restated)</i> ²	Change
Infrastructure	7.2	6.8	6%
Defence	4.1	3.2	29%
Mobility	1.9	1.8	6%
Energy	3.3	2.9	13%
Digital Technology ³	1.8	1.6	13%
Gattaca Projects	0.6	1.1	-45%
Other ¹	1.5	1.5	0%
Continuing Total Group NFI ("LFL")	20.4	18.9	8%
InfoSec People	1.0	-	100%
Continuing Total Group NFI	21.4	18.9	13%
Contract	16.5	13.9	19%
Perm	4.1	3.9	5%
Statement of Work	0.8	1.1	-27%
Total Group Continuing NFI	21.4	18.9	13%
Discontinued	-	-	0%
Total Group NFI	21.4	18.9	13%

All footnotes shown in Appendices on page 25

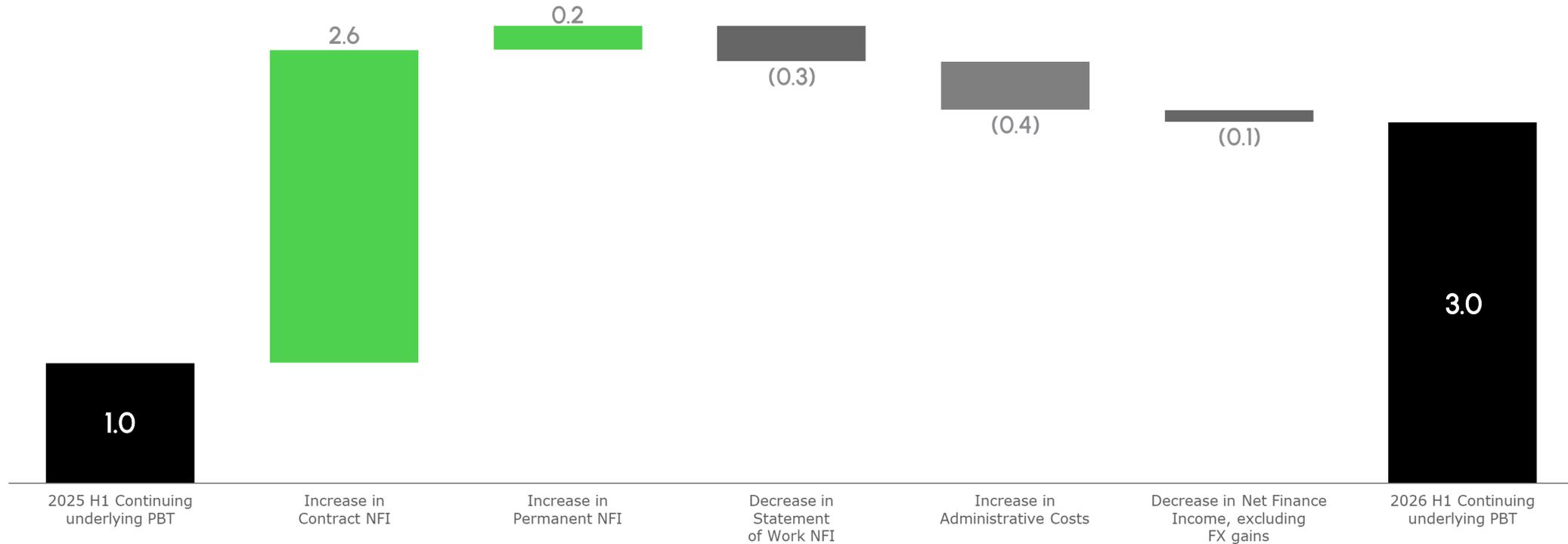
Continuing business NFI bridge £'m

Strong H1 performance driven by NFI growth



- Group NFI of £21.4m, an increase of 13% YoY, like for like NFI (excluding Infosec) up 8%
- Defence returned to YoY growth with a strong H1 with 29% YoY growth reversing a deflated performance in prior HY1
- Energy performed strongly with 13% YoY growth as our strategic investment continues to mature.
- Contract vs Statement of Work ("SoW") vs Permanent split 77% / 4% / 19% of Group NFI (2025 H12: 74% / 6% / 20%).

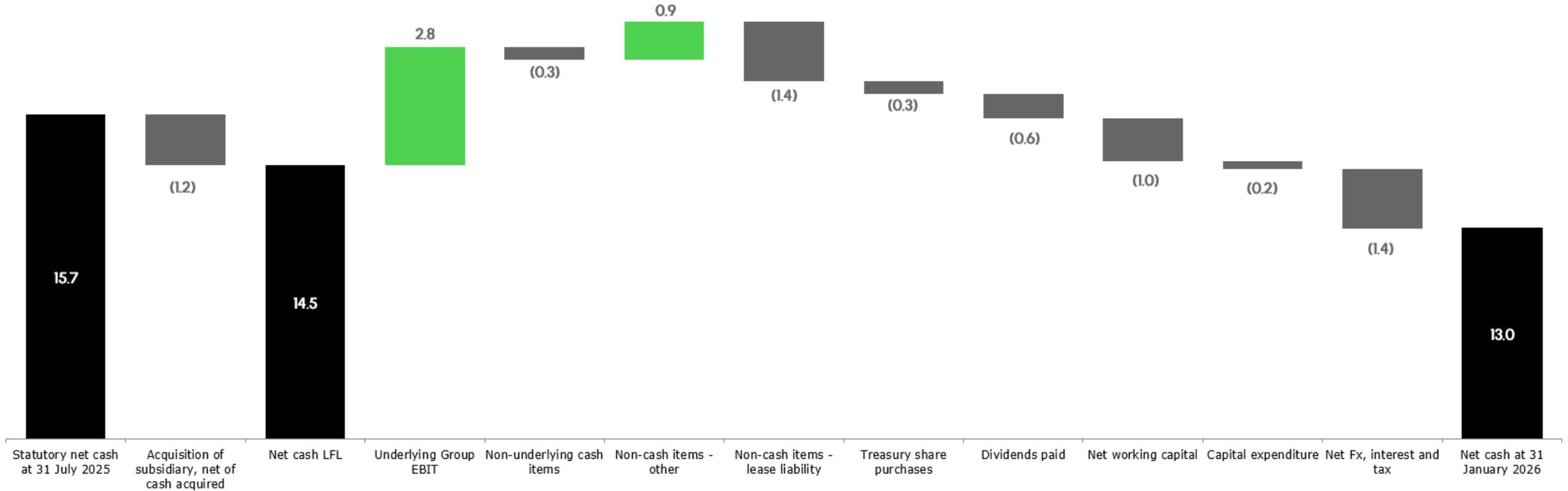
Underlying PBT bridge £'m



- Group continuing underlying profit before tax of £3.0m (2025 H1: £1.0m), reflecting strong performance as the Group continued to focus on operational efficiency and disciplined resource allocation, while maintaining investment in target sectors.

Net cash bridge £'m

Strong net cash position, in readiness for contract growth



- Net cash of £13.0 million (31 January 2025: £16.8 million).
- DSO stable at 47.0 days at 31 January 2026 (31 July 2025: 43.0 days).



• Outlook



Outlook



Gattaca sees growth potential in its chosen sectors having spent time rationalising and strengthening the Group, despite market conditions remaining challenging, with permanent hiring remaining subdued.



Our strategic focus remains on becoming even better in the sectors where we are looking to become the dominant provider, expanding our service offering to support our customers further, and continuing to grow our contractor base.



The Board is optimistic about the prospects of the Group, following the Feb 26 upgrade from £4.0m guidance for continuing underlying profit before tax remains at £4.5 million for FY26.



• Appendices

Gattaca at a glance

Our purpose is clear.

*"To provide the skills needed to build a better future
- one job at a time."*

Every project matters. We are driven by the long-term impact our work has on businesses, individuals, industries, and society.

Our vision is simple.

"To be the STEM partner of choice."

With over 40 years of deep sector expertise, we are uniquely positioned within the science, technology, engineering and mathematics landscape.

Our mission is straightforward.

Every day we deliver a service that is so trusted that our customers, colleagues and suppliers recommend us without hesitation.



Our Brands.

Every Gattaca brand is built on trust, professionalism, and ambition – delivering solutions that work and are recommended without hesitation.

i! matchtech

STEM recruitment done right. Connecting top engineering, tech, digital and scientific talent with the organisations driving innovation.

 **GATTACA
PROJECTS**

Project delivery that hits the mark. Specialist teams delivering results, milestones and long-term value with precision.

INF@SEC

Cybersecurity specialists. From niche experts to leadership hires, we build future ready security teams.

Structure, services, sectors & skills

matchtech

Technical & Professional

INFOSEC

Cyber security

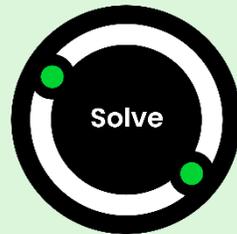
GATTACA PROJECTS

Engineering Consultancy

Services



Outsource



Solve



Recruit



SOW

Sectors

Infrastructure

Defence

Energy

Technology

Mobility

Defence

Energy

Skills

Engineering & Construction
Technology

Manufacturing & Production
Cyber

Commercial & Professional
Leadership

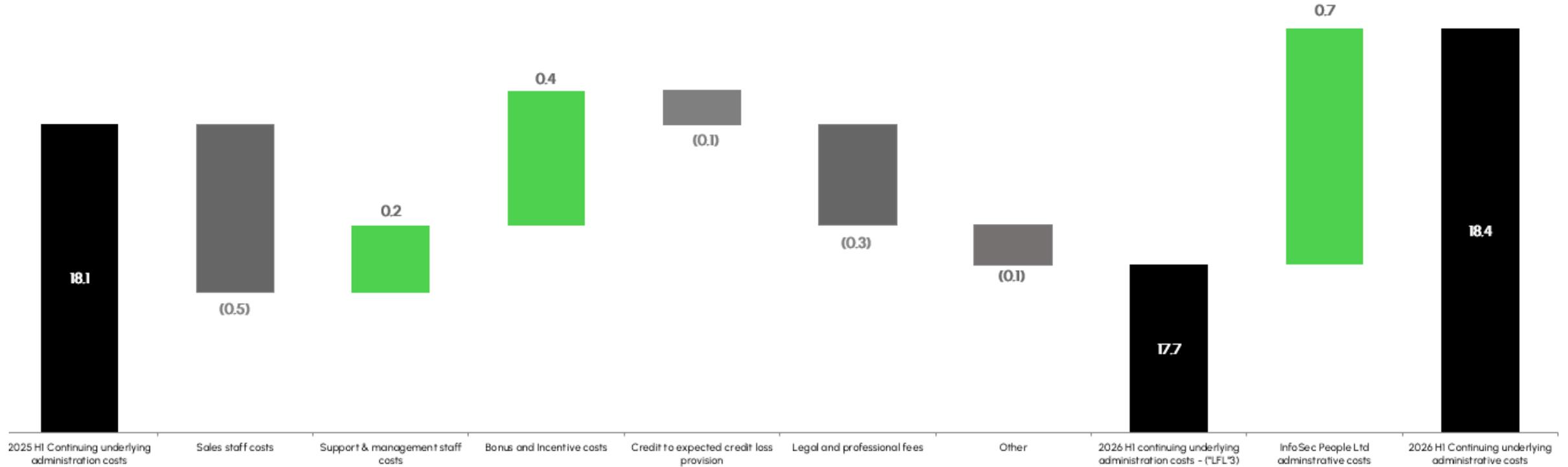
Project Management
Engineering Design

Market access

- Focus on experienced, professional level skills
- c.1% of total UK recruitment market
- 50,000 employers of STEM skills in UK
- 1.5m candidate reach
- National Critical Infrastructure focus
- Average contractor tenure 9 months
- 775 clients billed in last 12 months,
- Longest standing client 32 years and counting
- Significant growth potential within core sector focus and customer and base

Administrative cost bridge £'m

Our overhead cost increased year on year largely due to additional InfoSec People costs.



Continuing underlying PBT

January 2026 Half Year results	2026 H1			2025 H1			Continuing reported change %	Continuing underlying change %
	Continuing Reported £m	Adjustments £m	Continuing underlying £m	Continuing Reported £m	Adjustments £m	Continuing underlying £m		
Revenue	212.4		212.4	193.5		193.5	9.8%	+10%
Contract NFI	16.5		16.5	13.8		13.8	+20%	+20%
Contract gross margin (%)	8.2%		8.2%	7.6%		7.6%		
Permanent fees	4.1		4.1	3.9		3.9	+5%	+5%
Statement of Work	0.8		0.8	1.1		1.1	-27%	-27%
Gross Profit (NFI)	21.4		21.4	18.9		18.9	13%	13%
Gross margin (%)	10.1%		10.1%	9.8%		9.8%		
Admin expenses	(18.8)	0.3	(18.5)	(18.4)	0.3	(18.1)	+2%	+2%
EBIT	2.6	0.3	2.9	0.5	0.3	0.8	+410%	+256%
NFI conversion (%)	11.9%		13.4%	2.6%		4.2%		
Operating margin (%)	1.2%		1.3%	0.3%		0.4%		
Financing	0.0	0.1	0.1	0.3	(0.1)	0.2	-87%	-42%
Profit before tax	2.6	0.4	3.0	0.8	0.2	1.0	+218%	+10%

- NFI is equivalent to gross profit, being revenue less direct contractor costs.
- Continuing underlying results exclude the NFI and profit/(loss) before taxation of discontinued operations (2026 H1: £(0.1)m, 2025 H1: £0.1m), non-underlying items within administrative expenses relating to restructuring costs (2026 H1: £0.2m, 2025 H1: £0.2m) and other items (2026 H1: £0.1m, 2025 H1: £0.3m), amortisation of acquired intangibles (2026 H1: £0.0m, 2025 H1: £0.0), and net foreign exchange gains/(losses) (2026 H1: £0.1m, 2025 H1: £(0.1)m).

Continuing profit after tax and EPS

January 2026 Half Year results

	2026 HI		2025 HI		Continuing underlying change %
	Continuing reported £m	Continuing underlying £m	Continuing reported £m	Continuing underlying £m	
Profit before tax	2.6	3.0	0.8	1.0	+200%
Taxation	(0.8)	(0.8)	(0.3)	(0.3)	+167%
Profit after tax	1.8	2.2	0.5	0.7	+214%
Earnings per share					
	pence	pence	pence	pence	
Basic	5.6	6.9	1.6	2.2	+215%
Diluted	5.4	6.7	1.5	2.1	+214%
Dividend per share		1.33		1.00	

- Interim dividend of 1.33 pence per share (2025 HI: £1.00 pence).

Pro forma underlying profit before tax reconciliation

January 2026 Half Year results	2026 HI	2025 HI	Change
	£m	£m	£m
Group Profit before tax	2.5	0.9	1.6
Add back: discontinued operations (profit)/loss before tax	0.1	(0.1)	0.2
Continuing Profit before tax as reported	2.6	0.8	1.8
Add back:			
Non-underlying items	0.3	0.3	0.0
Amortisation of intangibles	0.0	0.0	0.0
Foreign exchange differences	0.1	(0.1)	0.2
Continuing underlying Profit before tax	3.0	1.0	2.0

Footnotes on sector NFI

Corresponding to the footnotes on page 10:

1. The Group reassessed its operating segment disclosures following changes in internal management reporting. As a result, certain segments that no longer met the quantitative thresholds in IFRS 8 for separate disclosure, have been aggregated and reported within the “Other” segment. Prior-period comparatives have been restated accordingly to ensure comparability.
2. In FY25, as a result of changes in the Group's operational structure and strategic focus, certain smaller divisions that were previously reported within the Other aggregated segment were absorbed into the Energy, Defence and Digital Technology sectors. In addition, a small team previously within Infrastructure moved over to the Energy sector. As a result, the Group's reported segmental analysis for HY25 has been restated to ensure comparability with this.
3. During FY25, Technology, Media & Telecoms segment was renamed Digital Technology. Our HY25 disclosure has been updated to reflect this.



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