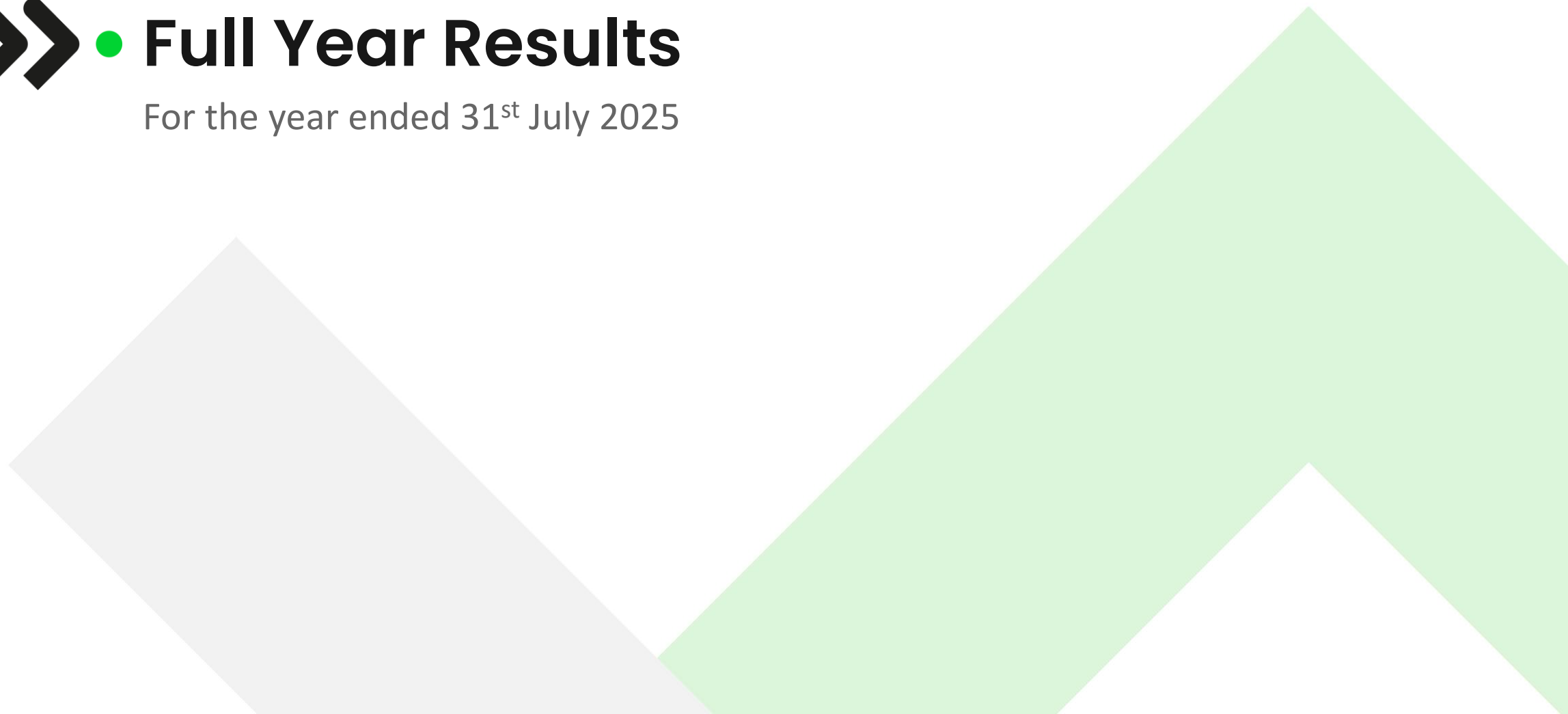


Three black chevrons pointing right, followed by a green dot.

• Full Year Results

For the year ended 31st July 2025



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Presenting Today



Matt has been with Gattaca for 23 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

Summary

- Group NFI of £38.8m, down 3% year on year ("YoY")
 - Infrastructure, our largest contributor to Group NFI (36%) grew by 5% with particularly strong growth within Water sector.
 - Defence sector, 19% of Group NFI, reduced slightly by 1%, exiting the year well with H2 up 14% YoY.
 - Energy sector, 16% of Group NFI, up 17% YoY reflecting strategic investment into headcount.
 - Contract NFI down 2% YoY, pleasingly the Group saw a 3% increase in contractors over the last six months to 31 July 2025 ("H2").
 - Permanent business remained subdued with NFI down 4% YoY reflecting the ongoing challenging market.
 - Gattaca Projects Statement of Work ("SoW") business NFI contracted by 24% YoY, due to anticipated key programme delays having grown 35% in FY24.
 - Contract vs SoW vs Perm split 75% / 6% / 19% of Group NFI (FY24: 74% / 7% / 19%).

➤➤➤ • Group continuing underlying PBT of £3.3m (FY24: £2.9m) up 12% year on year, reflecting focus on costs and productivity while top line growth is subdued.

➤➤➤ • Group net cash of £15.7m as at 31 July 2025 (31 July 2024: £20.7m, 31 January 2025: £16.8m) reflecting a slight extension of the working capital cycle coupled with cessation of the Group's non-recourse invoice discounting facility.

Key initiatives delivered in 2025

1

External Focus

- Increased our scale and focus on key sectors.
- New Matchtech brand and sales and marketing capability enabling us to improve efficiency and effectiveness of go to market in our chosen sectors.
- Delivered landmark Voice of the Workforce survey, gathering feedback from over 3,000 contractors, to support clients understanding their temporary workforce needs.

2

Culture

- **Winner of awards** for culture and sustainability
- **People engagement score** solid at 8.4 for FY25 (FY24: 8.1)
- **Further improvement in attrition to 28% at 31 July 2025** (31 July 2024: 31%, and 31 July 2023: 33%).

3

Operational Performance

- Direct actions resulted in increases in NFI per sales head by 7%, and by 13% per total head YoY
- **Further improving sales productivity** through the use of AI, automations and further leveraging our technology capability.
- **Integration of InfoSec People** acquisition progressing well, on track to have migrated operations to Group platforms by the end of FY26 H1.

4

Cost Re-balancing

- **Aligned** sector profitability to leadership reward
- Continue to **invest in our people and tools**, including brand and scaling Group capability in front line sales, whilst maintaining cost control.

Sector overview



Market overview

- Significant employment legislation changes upcoming that will impact the staffing sector: UK Employment Rights Bill and HMRC's Umbrella Company reforms
- Increased tax burden on UK employers in 2025, with employers NIC tax raised
- Ongoing skills shortage in the UK, especially in STEM
- 717,000¹ job vacancies in the UK, lowest level in four years, resulting in less mobility in labour market
- Labour market currently business-led; high candidate availability, companies nervous of investing, candidates nervous to move



Infrastructure

% of UK
NFI²

37%

FY25
performance

+5%

- Focused into Water, Highways & Rail
- Rail recovering slowly with HS2 funding being released; new UK economic cycles commencing across Highways, Rail and Water



Defence

19%

-1%

- Continued commitment linked to % of GDP for NATO
- Continued demand due to global market; delays in 2025 due to UK Strategic Defence Review



Energy

16%

+17%

- Continued investment in Renewable Energy generation
- Significant investment into Transmission and Distribution digitalisation and efficiency



Mobility

9%

-26%

- Ongoing growth within the Aerospace market, backlog of new aircraft deliveries
- Demand challenges across Automotive and recreational Marine



Digital Technology

8%

-10%

- Large market, Tech funding hard to come by for start-ups
- Clients want flexibility to scale up and down, contract stronger than perm



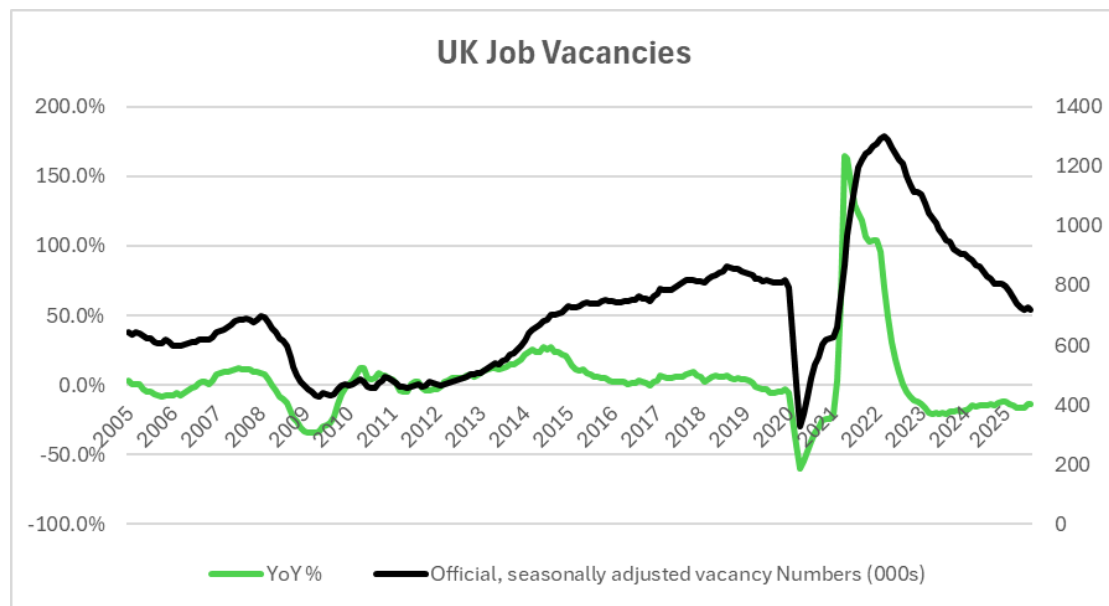
Commercial &
Professional Skills

6%

-15%

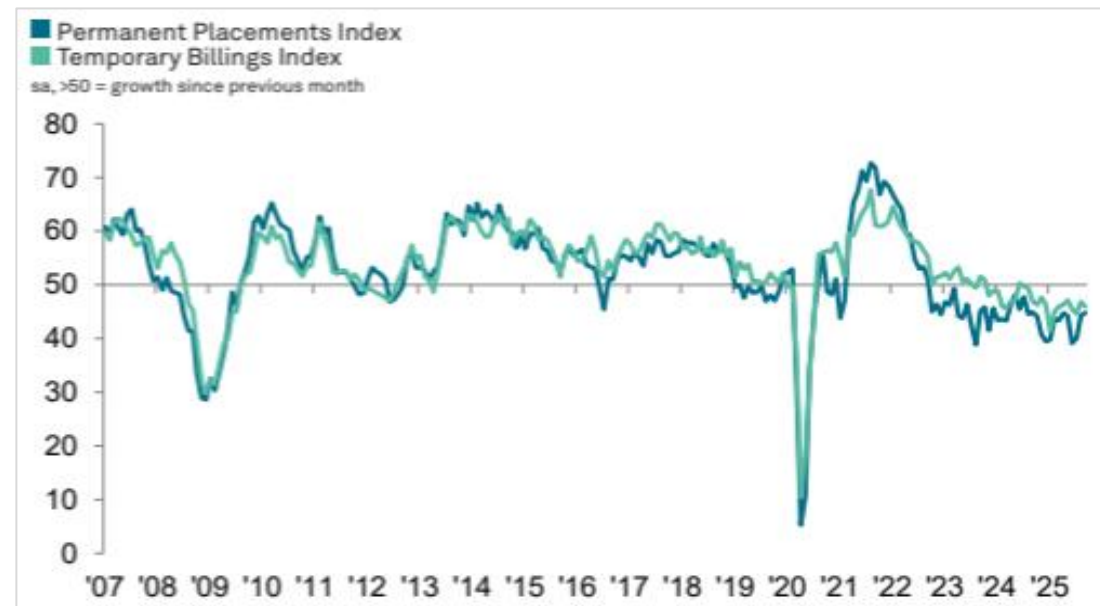
- Challenging perm market, companies nervous of investing
- Contract roles increasing

Labour market trends



Source: ONS data

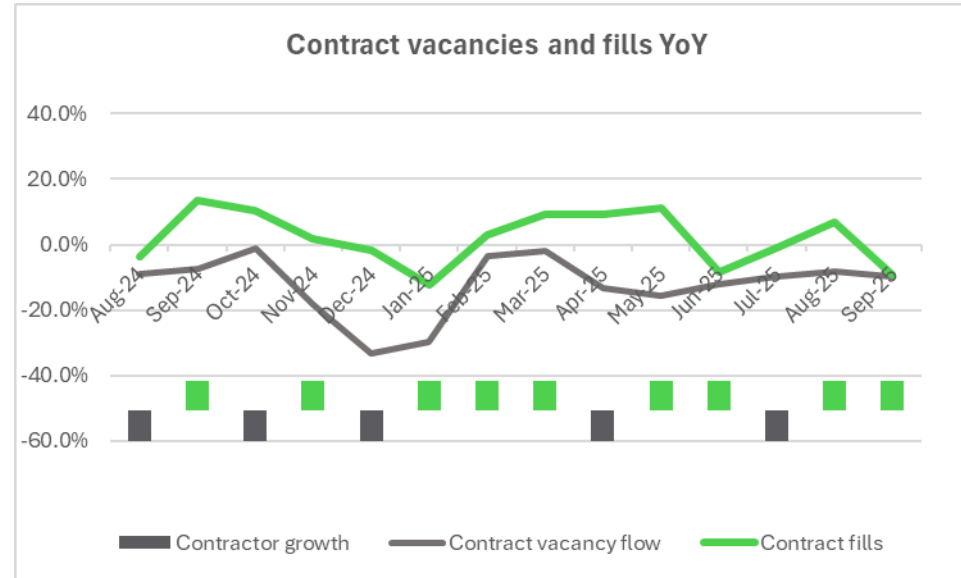
- Latest data from the Office for National Statistics (ONS) indicated a further fall in the number of vacancies during the three months to September. It was the thirty-fifth consecutive period that a quarterly decline has been registered
- The overall number of vacancies was at 717,000, down 115,000 (13.8%) from a year ago



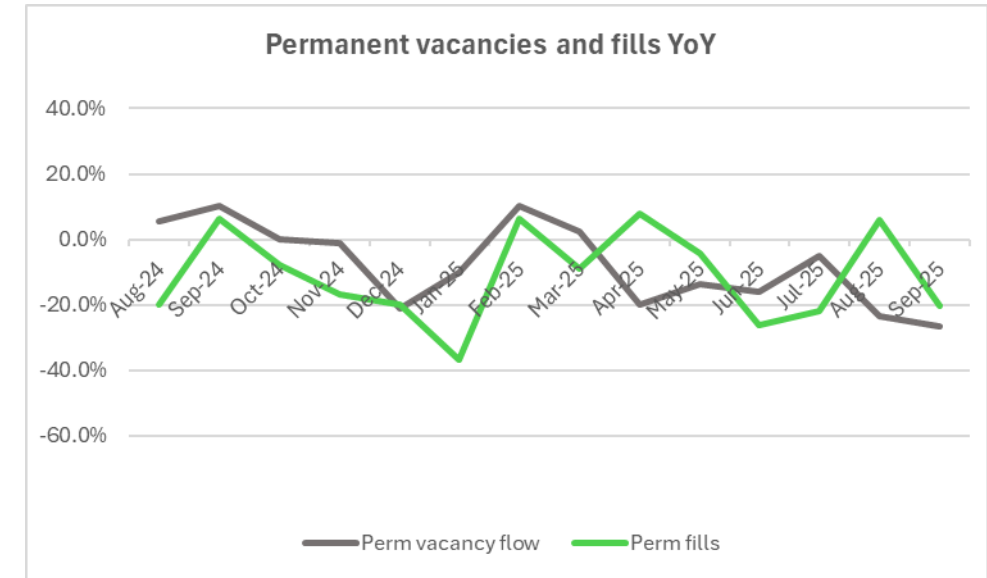
Source: KPMG and REC report on jobs, October 2025

- KPMG and REC reported in September 2025 that both permanent placements and temporary billings continued to decline.
- Permanent billings have now been reported as in decline for three years, whilst contract has been reported as in decline for the last fifteen months.

Gattaca vacancy and fill trends



- Contract vacancy flow rates have dropped by 12% during the 2025
- Despite this, our level of contract fills has remained consistent, up 1% in 2025 and enabling us to achieve contractor growth and take market share
- Contractor volume growth achieved in 9 of last 14 months



- Perm vacancy flow rates down 11% on average YoY during 2025
- Perm fill rates have matched the vacancy rates, also down 11%.
- Average perm fees up 20% YoY have partially offset volume decline

Four white chevrons pointing right, followed by a green dot.

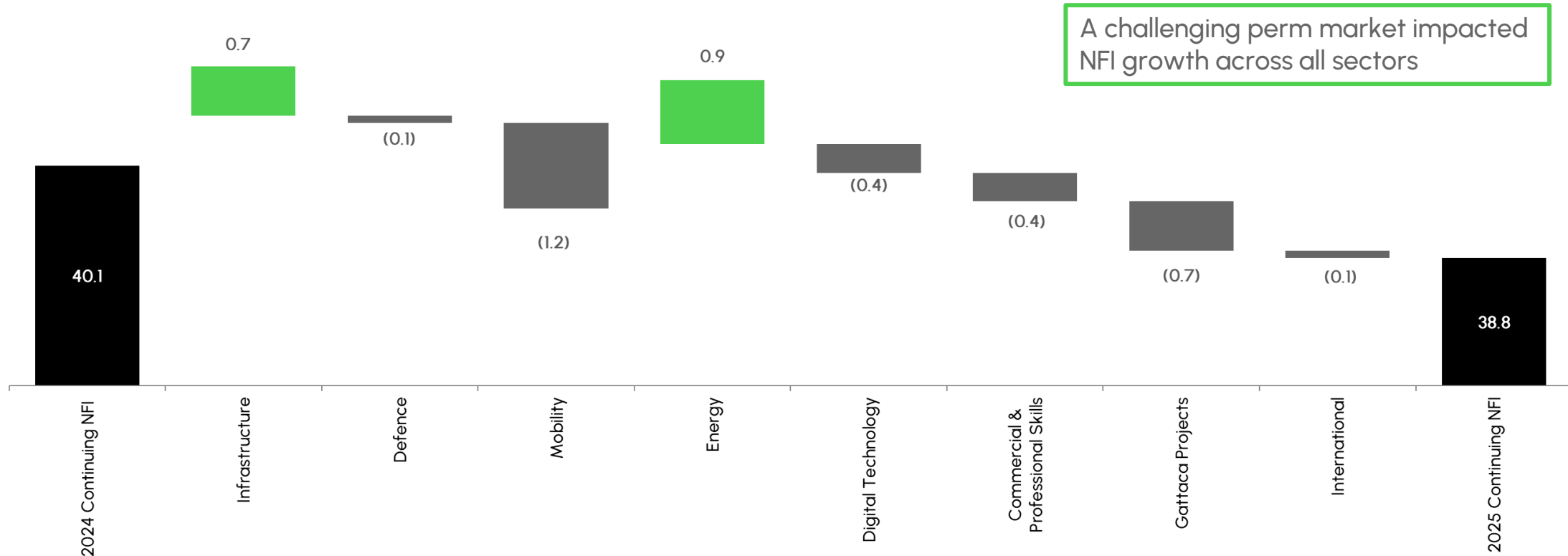
Financial Results

Continuing Group NFI by sector

Net Fee Income (NFI) £'m	2025	2024 (restated) ¹	Change
Infrastructure	14.0	13.3	5%
Defence	7.3	7.4	-1%
Mobility	3.4	4.6	-26%
Energy	6.2	5.3	17%
Digital Technology ³	3.1	3.5	-10%
Commercial & Professional Skills ⁴	2.2	2.6	-10%
Gattaca Projects	2.1	2.8	-24%
UK	38.3	39.5	-3%
International ²	0.5	0.6	-21%
Continuing Total Group NFI	38.8	40.1	-3%
Contract	29.3	29.6	-2%
Perm	7.4	7.7	-4%
Statement of Work ⁵	2.1	2.8	-24%
Continuing	38.8	40.1	-3%
Discontinued	-	0.3	-100%
Total Group NFI	38.8	40.4	-4%

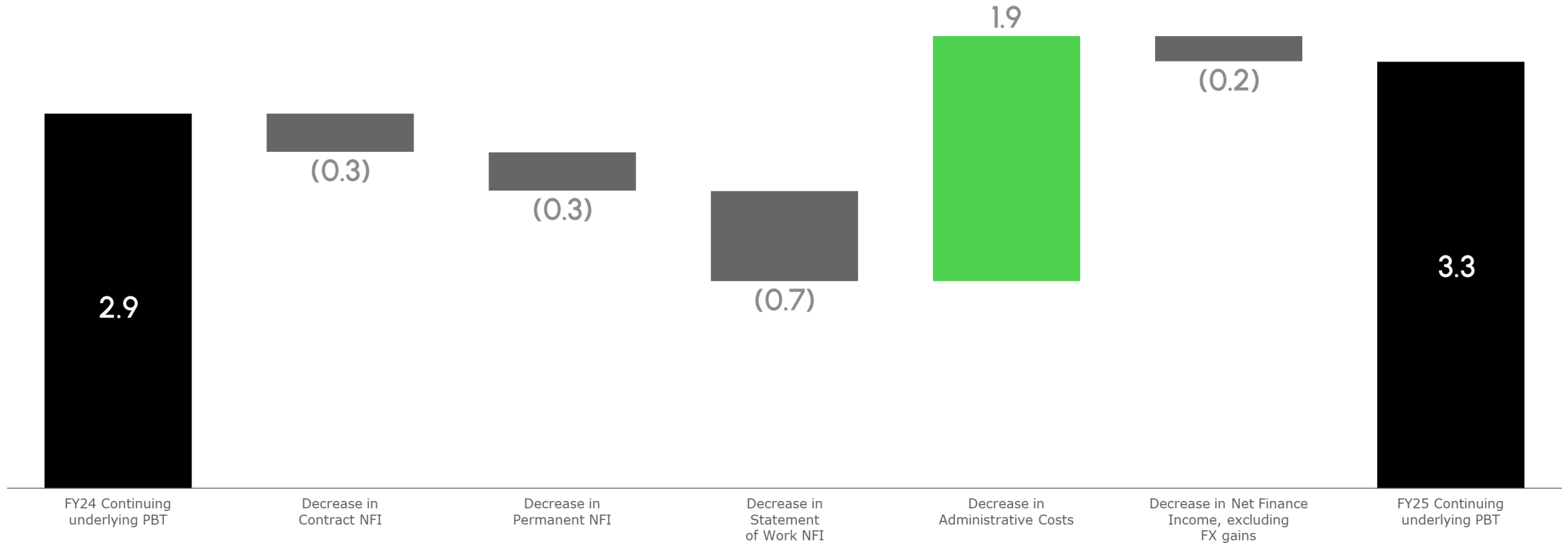
All footnotes shown in Appendices on page 22

Continuing business NFI bridge £'m



- Group NFI of £38.8m, down 3% YoY
- Permanent NFI remained subdued, down 4% YoY
- Gattaca Projects Statement of Work ("SoW") business NFI contracted by 24% YoY, due to anticipated key programme delays
- Contract & SoW vs Perm split represents 75% / 6% / 19% of Group NFI (FY24: 74% / 7% / 19%)

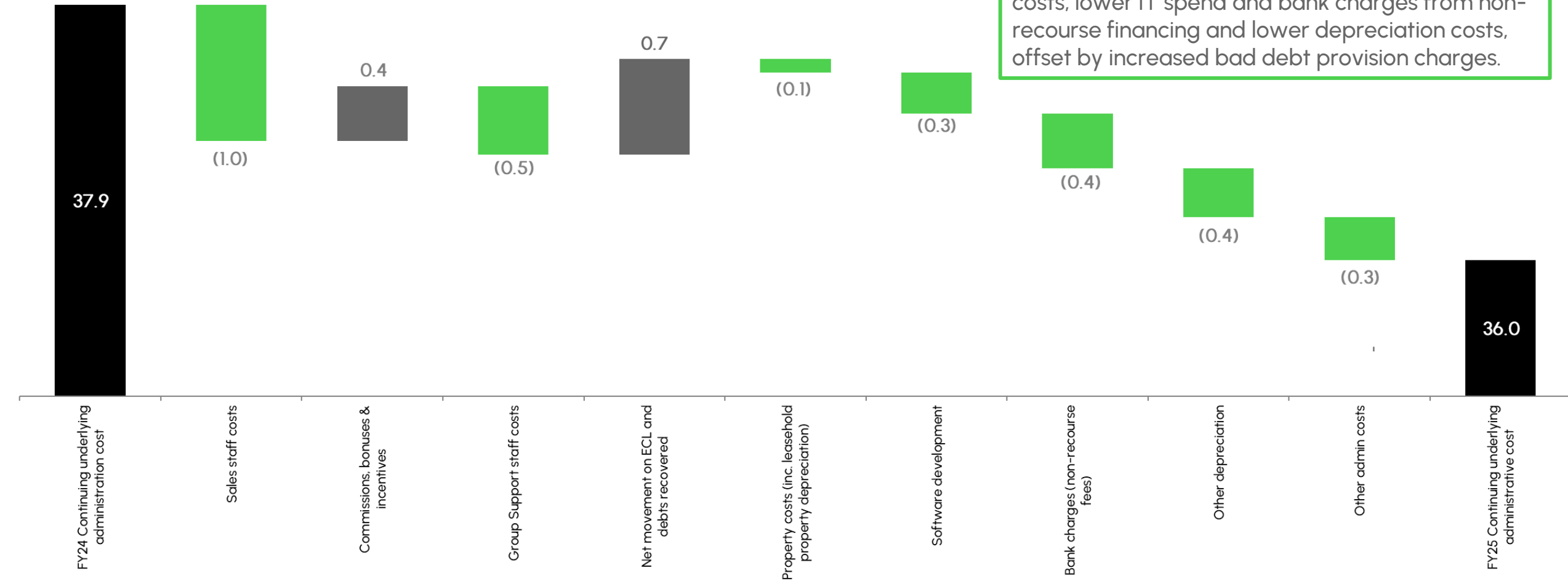
Underlying PBT bridge £'m



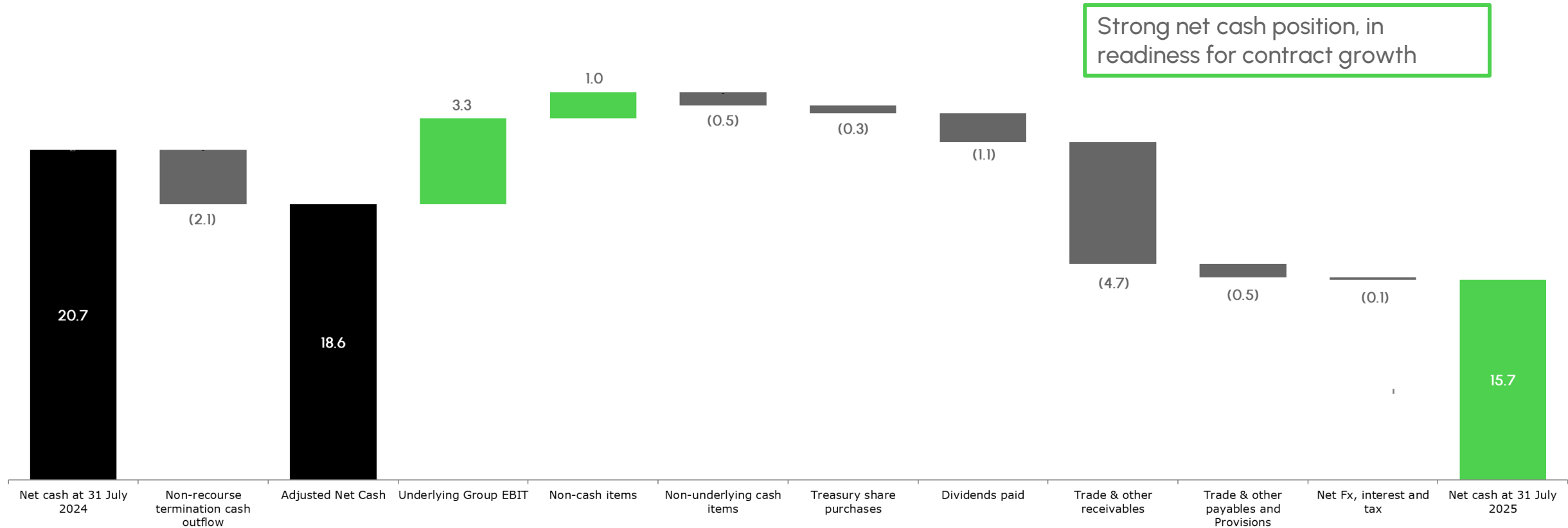
- Group continuing underlying PBT of £3.3m (FY24: £2.9m) up 12% year on year, reflecting rigorous focus on costs and productivity while top line growth is subdued.

Administrative cost bridge £'m

Our overhead cost savings came from a lower headcount base YoY as well as reduced property costs, lower IT spend and bank charges from non-recourse financing and lower depreciation costs, offset by increased bad debt provision charges.



Net cash bridge £'m



- Group net cash of £15.7m as at 31 July 2025 (31 July 2024: £20.7m, 31 January 2025: £16.8m) reflecting a slight extension of the working capital cycle coupled with cessation of the Group's non-recourse invoice discounting facility and £1.1m of dividends paid out to shareholders.
- DSO stable at 42.5 days at 31 July 2025 (31 July 2024: 43.0 days)

The Outlook logo is positioned on the left side of the image. It consists of four white chevron symbols pointing to the right, followed by a small green dot and the word "Outlook" in a white, bold, sans-serif font.

Outlook

Outlook



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



Group strategy remains consistent, with emphasis on having the right people and culture, complemented by bolt on acquisitions. Ongoing productivity improvements and robust cost control will support growth, whilst providing us the headroom to add further experienced people to the Group's sales teams.



The Board is optimistic about the prospects of the Group with an expectation for the FY26 year ahead to achieve further growth in continuing underlying profit before tax, in line with the current market consensus of £4m.

 • 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 straight-forward.

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.

Continuing underlying PBT

Year to 31 July	2025			2024				
	Continuing Reported £m	Adjustments £m	Continuing underlying £m	Continuing Reported £m	Adjustments £m	Continuing underlying £m	Continuing reported change %	Continuing underlying change %
Revenue	398.9		398.9	389.5		389.5	2.4%	+2%
Contract NFI	29.3		29.3	29.6		29.6	-1%	-1%
Contract gross margin (%)	7.9%		7.9%	8.1%		8.1%		
Permanent fees	7.4		7.4	7.7		7.7	-4%	-4%
Statement of Work	2.1		2.1	2.8		2.8	-25%	-25%
Gross Profit (NFI)	38.8		38.8	40.1		40.1	-3%	-3%
Gross margin (%)	9.7%		9.7%	10.3%		10.3%		
Admin expenses	(36.6)	0.7	(35.9)	(39.0)	1.1	(37.9)	-6%	-5%
EBIT	2.2	0.7	2.9	1.1	1.1	2.2	+100%	+32%
NFI conversion (%)	5.7%		7.5%	2.7%		5.5%		
Operating margin (%)	0.6%		0.7%	0.3%		0.6%		
Financing	0.4	0.0	0.4	0.6	0.1	0.7	-31%	-41%
Profit before tax	2.6	0.7	3.3	1.7	1.2	2.9	+53%	+10%

- INFI is equivalent to gross profit, being revenue less direct contractor costs.
- Continuing underlying results exclude profits / (losses) before taxation of discontinued operations (2025: £0.5m, 2024: £(0.6)m, non-underlying items within administrative expenses relating to restructuring costs (2025: £(0.3)m, 2024: £(0.5)m), and other items (2025: £(0.3)m, 2024: £(0.6)m), amortisation of acquired intangibles (2025: £(0.0)m, 2024: £(0.1)m, and net foreign exchange losses (2025: £(0.0)m, 2024: £(0.1)m loss).
- NFI commentary is on a continuing underlying like for like constant currency basis.

Continuing profit after tax and EPS

Year to 31 July

	2025		2024		Continuing underlying change
	Continuing reported	Continuing underlying	Continuing reported	Continuing underlying	
	£m	£m	£m	£m	%
Profit before tax	2.6	3.3	1.7	2.9	+14%
Taxation	(0.7)	(0.8)	(0.9)	(1.0)	-20%
Profit after tax	1.9	2.5	0.8	1.9	+32%
Earnings per share					
	pence	pence	pence	pence	
Basic	5.9	7.8	2.4	6.0	+30%
Diluted	5.7	7.6	2.4	5.9	+29%
Dividend per share		3.0		2.5	

- Final dividend of 2.0 pence per share, increasing the full year dividend by 20% to 3.0 pence per share (FY24: 2.5 pence per share).

Pro forma underlying profit before tax reconciliation

Year to 31 July	2025	2024	Change
	£m	£m	£m
Group Profit before tax	3.1	1.1	2.0
Add back: discontinued operations (profit)/loss before tax	(0.5)	0.6	(1.1)
Continuing Profit before tax as reported	2.6	1.7	0.9
Add back:			
Non-underlying items	0.7	1.1	(0.4)
Amortisation of intangibles	0.0	0.1	(0.1)
Foreign exchange differences	0.0	0.0	0.0
Continuing underlying Profit before tax	3.3	2.9	0.4

Footnotes on sector NFI

Corresponding to the footnotes on page 10:

1. 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 have been 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 FY24 has been restated to ensure comparability with this.
2. International segment revenue and gross profit is generated from the location of the commission-earning sales consultant, as opposed to the domicile of the respective subsidiary by which they are employed.
3. Technology, Media & Telecoms segment has been renamed Digital Technology.
4. During the current year, Commercial & Professional has exceeded the quantitative thresholds outlined in IFRS 8. As a result, it meets the criteria for separate disclosure. The prior year data has also been disclosed separately to ensure transparency and relevance of financial information to users of the financial statements. This disclosure was previously included under the 'Other' segment in FY24. However, following this reassessment of the reporting requirements, this segment is no longer applicable and has been removed.
5. During the current reporting period, the Group reassessed the classification of certain revenue streams. As a result, a segment previously reported under 'Other' revenue has been reclassified to Statement of work revenue to better reflect the nature of the underlying activities. The comparative figures for FY24 have been restated accordingly to ensure consistency and comparability across periods.



Gattaca plc

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