GATTACA

Full Year Results

For the year ended 31st July 2026



GATTACA

Contents

- Summary 4
- Financial Results 9
- Outlook 15
- Appendices 17

Presenting Today

Matt Wragg - CEO

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 Whittaker - CFO

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 £43.2m, grew 11% year on year ("YoY").
- Group like-for-like ("LFL") NFI of £41.5m up 7% (31 July 2025: £38.8m).
- Contract NFI up 16% YoY, driven by strong growth in our contractor numbers across core sectors: Infrastructure, Defence, Energy and Digital Technology.
- Permanent business improved, with NFI up 4% YoY, reflecting a modest recovery despite challenging market conditions.
- Gattaca Projects Statement of Work ("SoW") business NFI contracted by 44% YoY, reflecting the timing of certain major client programmes.
- Contract vs SoW vs Perm split 78% / 3% / 19% of Group NFI (FY25: 75% / 6% / 19%).

- Group continuing underlying profit before tax of £6.1m (FY25: £3.3m) up 85% year on year, due to NFI growth combined with focus on cost and productivity.

- Group net cash of £15.4m as at 31 July 2026 was broadly flat against 31 July 2025: £15.7m (31 January 2026: £13.0m), as operating cash generation funded investment in InfoSec people, dividend payments and investment in working capital to support contractor growth.
- Final dividend of 4.67 pence per share, increasing the full year dividend by 100% to 6.0 pence.

Key initiatives delivered in 2026

1

External Focus

- Consolidated our recruitment brands under a single powerhouse brand, Matchtech, operating across all our sectors, services and skills. This has increased client awareness, strengthened candidate engagement, and enhanced our employer value proposition.
- Targeted investment in client facing sales capacity across our core sectors.
- High scores-maintained year on year in both client and candidate feedback.

2

Culture

- Integrated InfoSec People team into the Group maintaining team engagement above Group target.
- Recognised within The Sunday Times Best Places to Work 2026, top 10 big companies. Winner of The Inclusive Culture Initiative Award at the Inclusive Awards 2025. Highly Commended for the Diversity Initiative of the Year award at the Recruitment and Employment Confederation Awards.
- People engagement score improved to 8.7 in FY26 (FY25: 8.4) and improved attrition rate at 27 % (FY25: 28%, and FY24: 31%).

3

Operational Performance

- Productivity initiatives resulted in increase in NFI per sales head by 20%, and by 19% per total head YoY.
- Achieved ISO27001 certification, strengthening our information security standards and reinforcing client trust.
- Launched Matchtech AI and automations programme (MAIA) across front line sales and back-office functions to improve customer experience and efficiency.

4

Cost Optimisation

- Completed the integration of InfoSec People into our Group systems delivering the targeted synergy benefits.
- Progressed the simplification of the Group's corporate structure, liquidating two group entities in the year, further reducing third party advisor costs globally.

Sector overview

Market overview

- The UK labour market is stabilising, but recovery remains fragile amid higher employment costs, regulatory change and cautious business confidence.
- Demand for specialist STEM capability remains resilient, supported by ageing workforce demographics, lower skilled migration and investment in technology.
- Temporary hiring has grown since April 2026, while permanent placements have increased for the first time in nearly four years, although employers remain selective and cost-conscious.
- Persistent shortages continue in core and specialist STEM roles despite increased overall candidate availability.
- UK vacancies fell to approximately 706,000[1], lowest level in five years, resulting in less mobility in labour market.

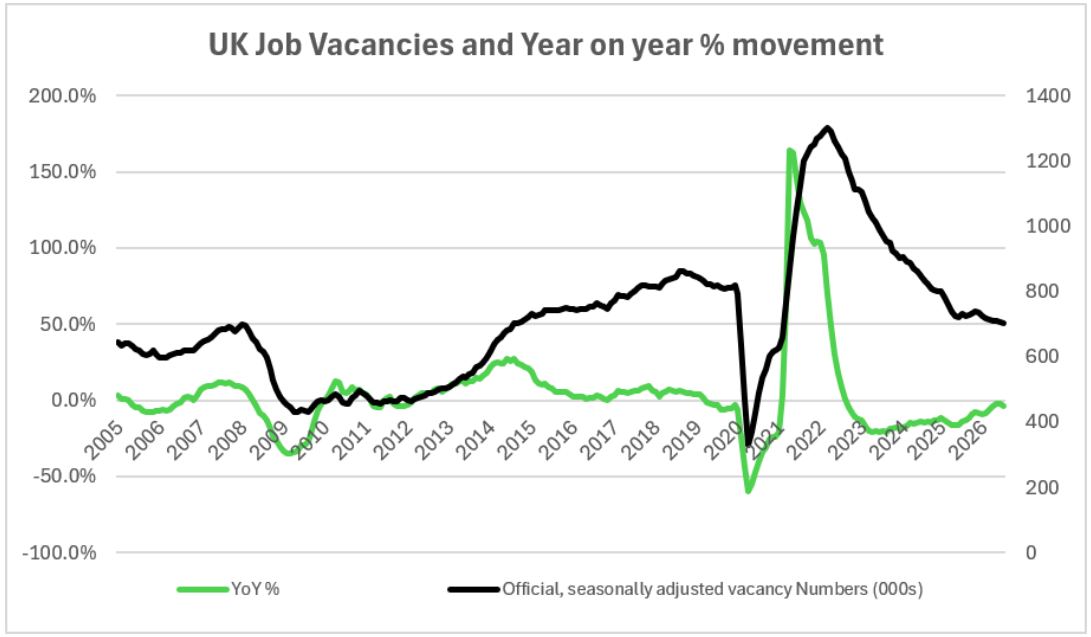
	% of UK NFI[2]	FY26 performance	
 Infrastructure	34%	+5%	• Focused on Water, Highways & Rail sub sectors. • Water AMP8 and major private projects support growth opportunities; public-sector highways hiring remains cautious. Rail remains flat amid UK investment constraints.
 Defence	20%	+17%	• Continued commitment linked to % of GDP for NATO. • Larger organisations have remained busy as they deliver their multi-year projects. Innovative new businesses starting to drive uptick in demand.
 Energy	15%	+4%	• Significant investment into Transmission and Distribution upgrading the national electricity grid and associated projects • Civil nuclear and data centre investment presents opportunity.
 Digital Technology	8%	+10%	• Increase led by contractor demand in data, AI, projects and programmes. • Permanent fees stayed flat amid cautious hiring, while Limitless in Tech grew its network beyond 1,500 and generated new business.
 Other	20%	+48%[3]	• Perm market showing some signs of recovery in Commercial & Professional Skills. • InfoSec People acquisition added to Group capability.

1 UK Office for National Statistics: job vacancies July 2026.

2 Excluding Gattaca Projects, which comprises the remaining 3% of UK NFI.

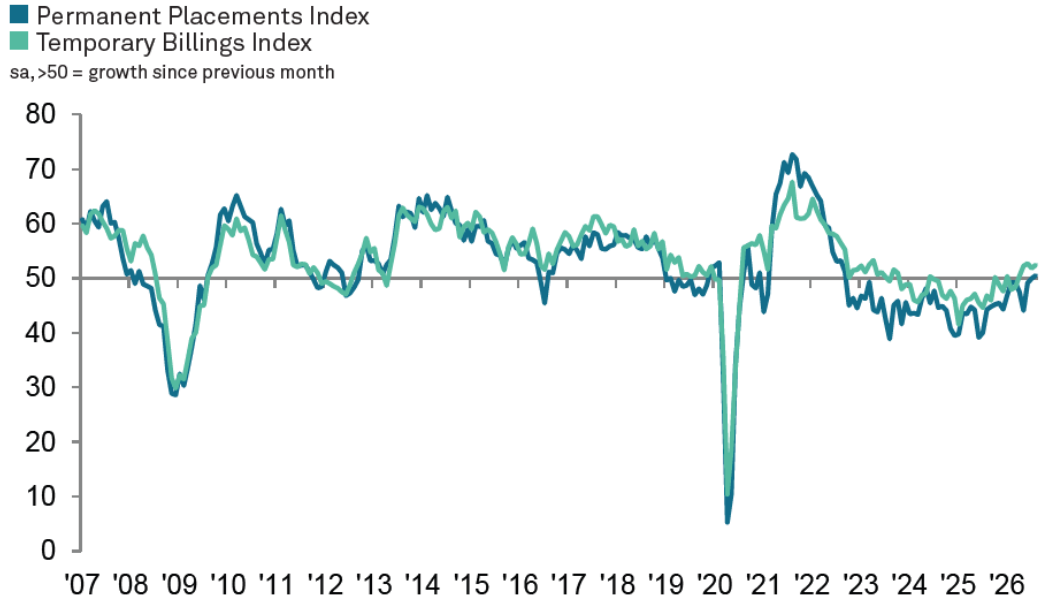
3 Other includes InfoSec People which was acquired in the period. Like for Like growth of Other segments is 17%

Labour market trends



Source: Office for National Statistics: UK vacancy data: September 2026

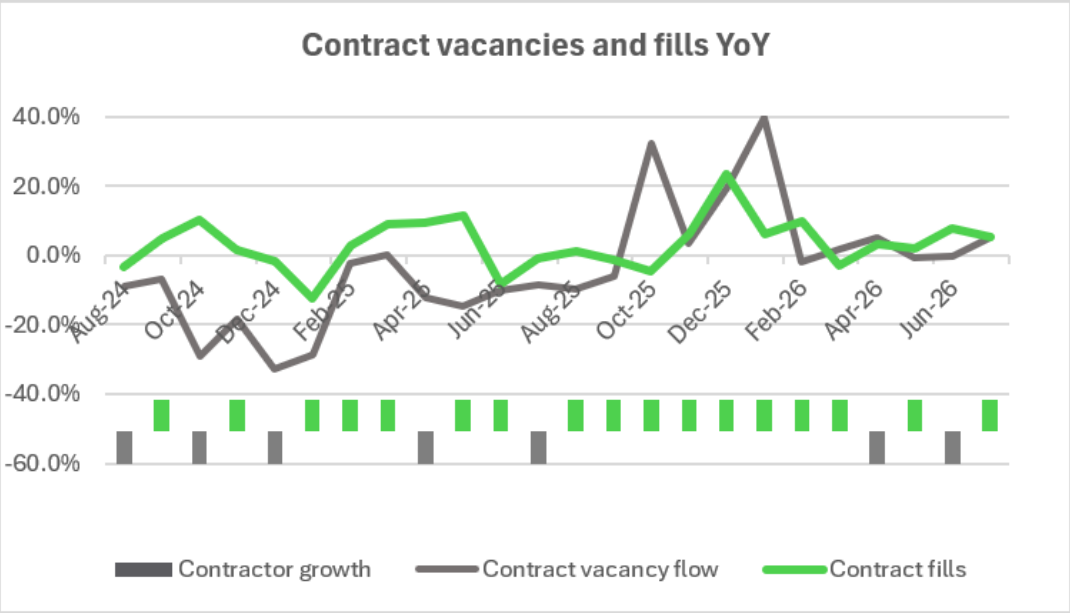
- Latest data from the Office for National Statistics (ONS) indicated a further fall in the number of vacancies during the three months to July 2026. It was the forty-fourth consecutive period that a quarterly decline has been registered.
- Vacancies fell further to around 706,000 in the three months to July 2026 (July 2025: 727,000), roughly 2.9% down year-on-year.

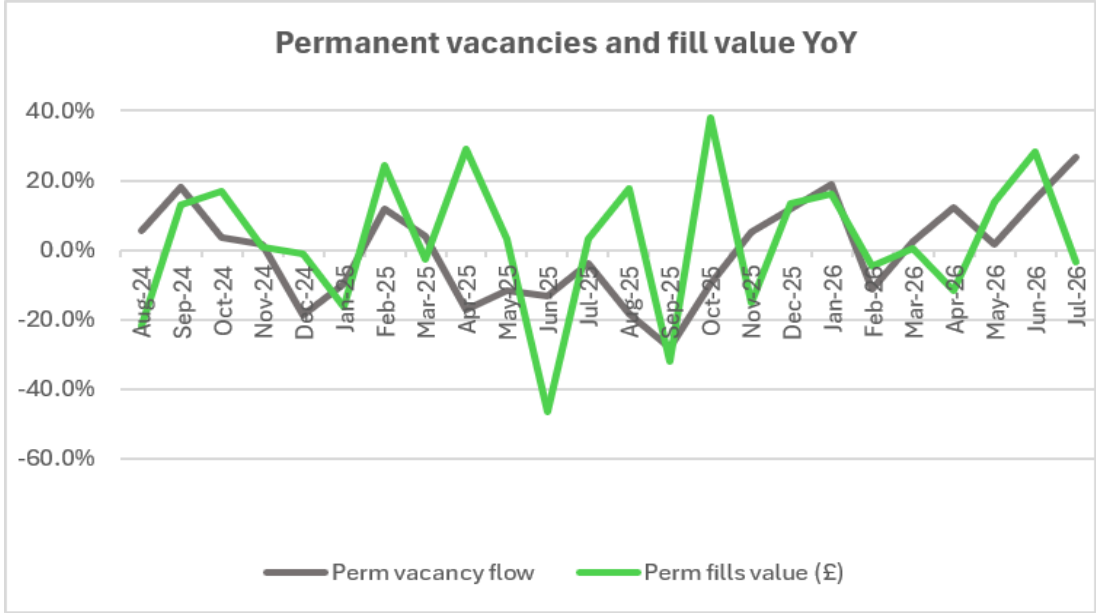


Source: KPMG and REC report on jobs, September 2026

- The September 2026 KPMG and REC report on jobs highlighted improving market sentiment through 2026 despite the continued falling vacancy numbers and high unemployment figures.
- Temp billings reported in growth since April 26.
- Perm now also in growth since July 26, the first time in growth for four years.

Gattaca vacancy and fill trends





- Contract vacancy flow rates were up 7% during 2026.
- Despite this, our level of contract fills has also improved in the year, up 5% in 2026 as we recognised a second year of contractor growth.
- Net contractor growth achieved in 10 of 12 months during FY26.

- Perm vacancy flow rates up 2% on average YoY during 2026, with the trend improving as we exited the year.
- Perm fills by value were up 3% YoY, with a strong May and June 26.
- Average perm fees up 3% YoY.



Financial Results

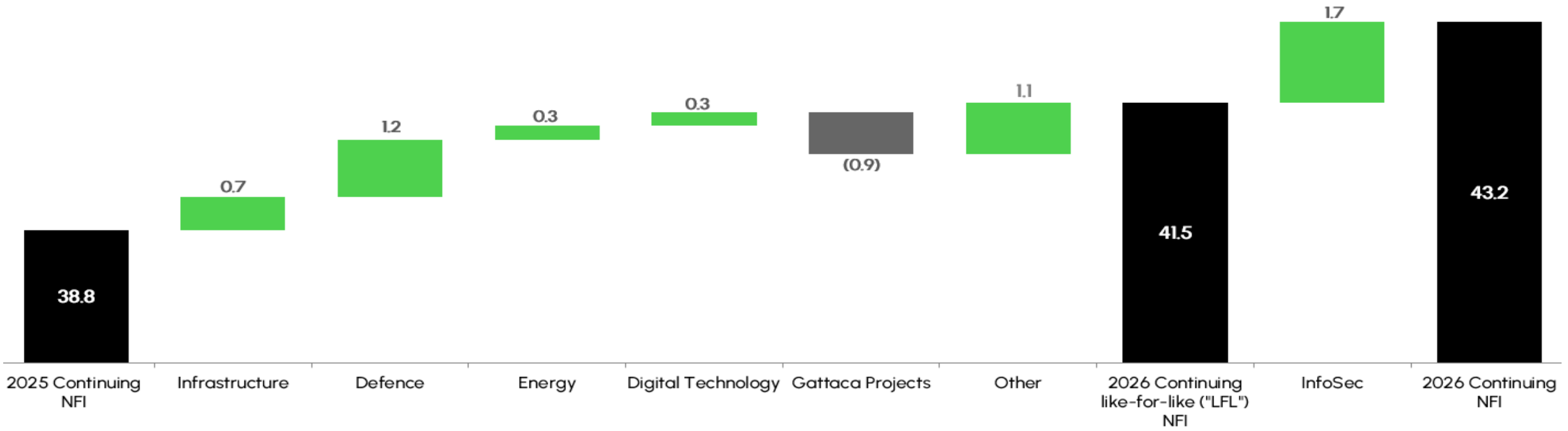
Continuing Group NFI by sector

Net Fee Income (NFI) £'m	2026	2025 (restated[2])	Change
Infrastructure	**14.6**	14.0	**5%**
Defence	**8.6**	7.3	17%
Energy	**6.5**	6.2	4%
Digital Technology	**3.4**	3.1	10%
Gattaca Projects	**1.2**	2.1	-44%
Other[1]	**7.2**	6.1	17%
Continuing Total Group NFI ("LFL")	**41.5**	**38.8**	**7.1%**
InfoSec People	**1.7**	-	100.0%
Continuing Total Group NFI	**43.2**	**38.8**	**11.4%**
Contract	**33.5**	28.9	15.9%
Perm	**7.7**	7.4	4.1%
Statement of Work	**1.5**	2.1	-28.6%
Other	**0.5**	0.4	25.0%
Total Group Continuing NFI	**43.2**	**38.8**	**11.4%**
Discontinued	-	-	0.0%
Total Group NFI	**43.2**	38.8	**11.4%**

All footnotes shown in Appendices on page 22.

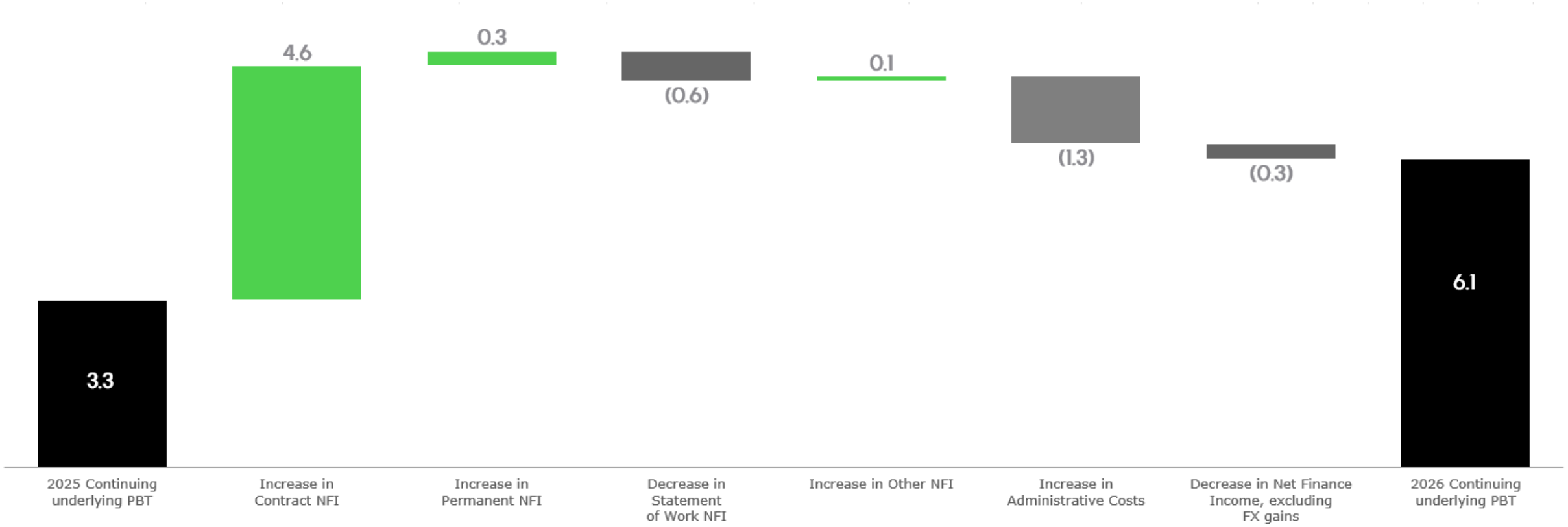
Continuing business NFI bridge £'m

Strong FY26 performance driven by NFI growth of £4.4m, 11% increase



- Group NFI of £43.2m, an increase of 11% YoY, like for like NFI (excluding InfoSec) up 7%.
- Defence returned to YoY growth, increasing by 17%, following a challenging prior year's performance.
- Digital Technology also returned to YoY growth of 10%, reflecting a strong recovery from prior year's performance.
- Contract & SoW vs Perm split represents 78% / 3% / 19% of Group NFI (FY25: 75% / 6% / 19%).

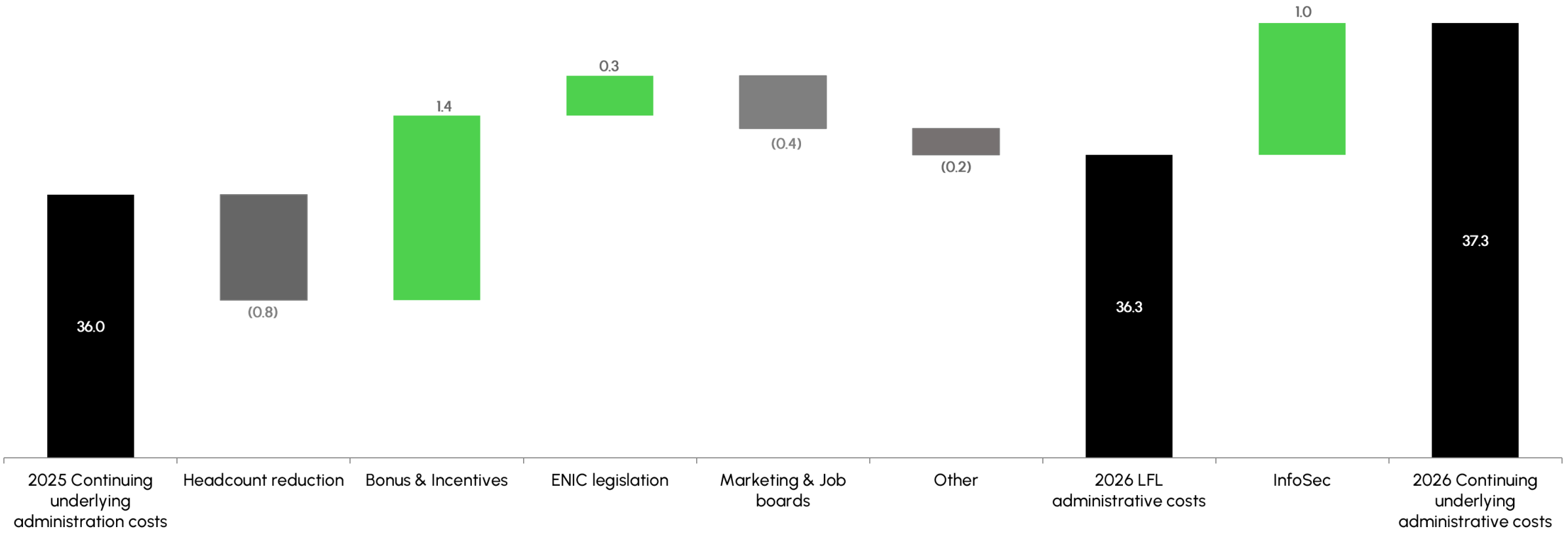
Underlying PBT bridge £'m



- Group continuing underlying PBT of £6.1m (FY25: £3.3m) up 85% year on year, reflecting rigorous focus on costs and productivity while also delivering growth in NFI.

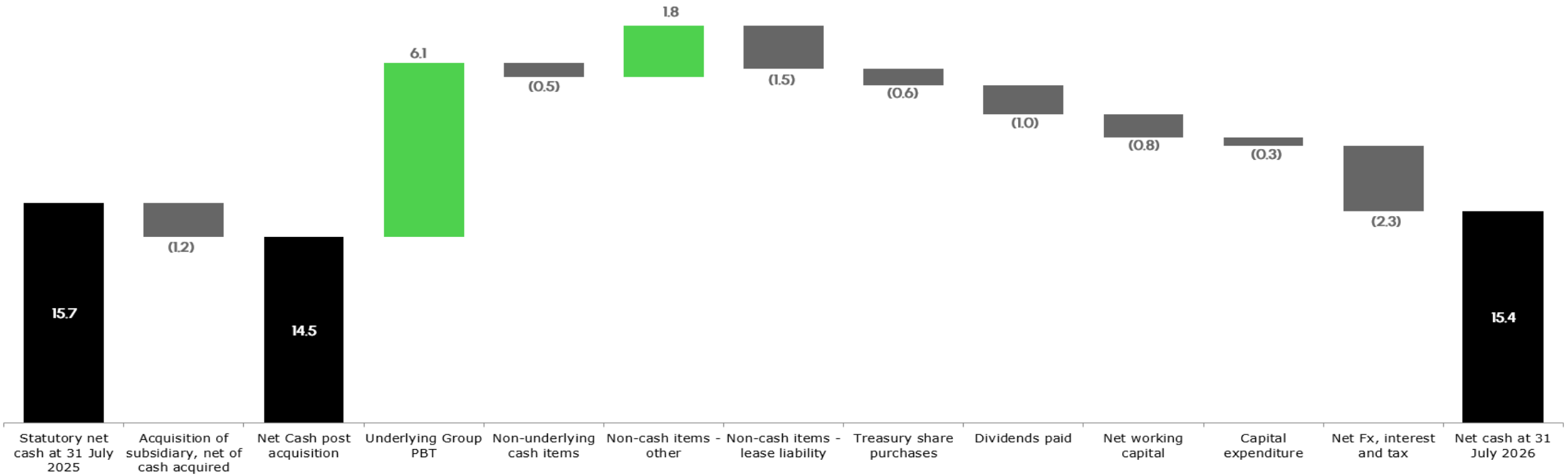
Administrative cost bridge £'m

Disciplined cost management largely offset the impact of higher performance-related incentives and the integration of InfoSec People Ltd, resulting in a modest increase in administrative costs.



Net cash bridge £'m

Maintained a strong net cash position to support the delivery of future growth opportunities.

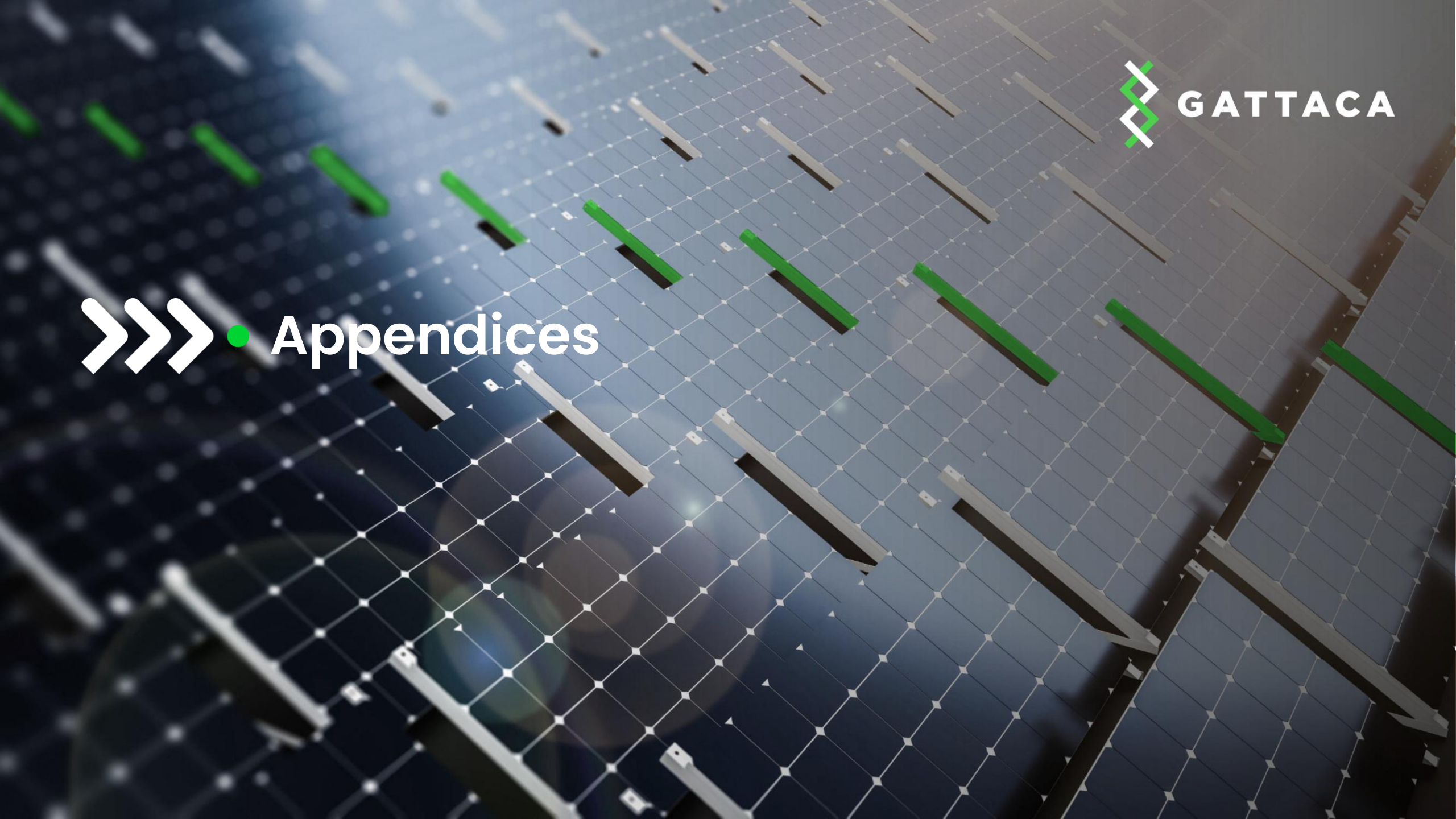


- Group net cash remained robust at £15.4m as at 31 July 2026 (31 July 2025: £15.7m, 31 January 2026: £13.0m) despite £1.023m of shareholder dividends with working capital improving significantly YoY.
- DSO stable at 40.5 days at 31 July 2026 (31 July 2025: 42.5 days).


GATTACA
Outlook

Outlook

- We enter FY27 with improving momentum and a clear focus on converting progress into sustained earnings growth.
- While macroeconomic uncertainty continues to affect some hiring markets, demand for specialist STEM skills and workforce solutions remains resilient. Increased market share, a broader contractor base and strong client relationships support our confidence in the year ahead.
- The Board expects further growth in continuing underlying profit before tax in FY27, in line with current market expectations of £6.5m.



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.

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.

INFOSEC

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

Continuing underlying PBT

Year to 31 July	2026			2025				
	Continuing Reported £m	Adjustments £m	Continuing underlying £m	Continuing Reported £m	Adjustments £m	Continuing underlying £m	Continuing reported change %	Continuing underlying change %
Revenue	**443.3**		**443.3**	398.9		398.9	+11%	+11%
Contract NFI	**33.5**		**33.5**	28.9		28.9	+16%	+16%
Contract gross margin (%)	***7.6%***		***7.6%***	*7.2%*		*7.2%*		
Permanent fees	**7.7**		**7.7**	7.4		7.4	+4%	+4%
Statement of Work	**1.5**		**1.5**	2.1		2.1	-29%	-29%
Other[1]	**0.5**		**0.5**	0.4		0.4	+25%	+25%
Gross Profit (NFI)	**43.2**		**43.2**	38.8		38.8	11%	11%
Gross margin (%)	***9.7%***		***9.7%***	*9.7%*		*9.7%*		
Admin expenses	**(37.7)**	**0.5**	**(37.2)**	(36.6)	0.7	(35.9)	+3%	+4%
EBIT	**5.5**	**0.5**	**6.0**	2.2	0.7	2.8	+150%	+114%
NFI conversion (%)	***12.7%***		***13.8%***	*5.7%*		*7.3%*		
Operating margin (%)	***1.2%***		***1.4%***	*0.6%*		*0.7%*		
Financing	**0.2**	**(0.1)**	**0.1**	0.4	0.0	0.4	-52%	-76%
Profit before tax	**5.7**	**0.4**	**6.1**	2.6	0.7	3.3	+119%	+85%

- NFI is equivalent to gross profit, being revenue less direct contractor costs.
- Continuing underlying results exclude (losses)/profits before taxation of discontinued operations (2026: £(0.0)m, 2025: £0.5m, non-underlying items within administrative expenses relating to restructuring costs (2026: £(0.2)m, 2025: £(0.3)m), and other items (2026: £(0.3)m, 2025: £(0.4)m), amortisation of acquired intangibles (2026: £(0.0)m, 2025: £(0.0)m, and net foreign exchange gains (2026: £(0.1)m, 2025: £(0.0)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	2026 Continuing reported £m	2026 Continuing underlying £m	2025 Continuing reported £m	2025 Continuing underlying £m	Continuing underlying change %
Profit before tax	5.7	6.1	2.6	3.3	+85%
Taxation	(1.7)	(1.7)	(0.7)	(0.8)	+113%
Profit after tax	**4.0**	**4.4**	1.9	2.5	**+76%**
Earnings per share					
	pence	**pence**	pence	pence	
Basic	12.8	13.8	5.9	7.8	+77%
Diluted	12.3	13.3	5.7	7.6	+75%
Dividend per share (pence)		**6.0**		3.0	

- Final dividend of 4.67 pence per share, increasing the full year dividend by 100% to 6.0 pence per share (FY25: 3.0 pence per share).

Pro forma underlying profit before tax reconciliation

Year to 31 July	2026	2025	Change
	£m	£m	£m
Group Profit before tax	5.7	3.1	2.6
Add back: discontinued operations (profit)/loss before tax	0.0	(0.5)	0.5
Continuing Profit before tax as reported	**5.7**	**2.6**	**3.1**
Add back:			
Non-underlying items	0.5	0.7	(0.2)
Amortisation of intangibles	0.0	0.0	0.0
Foreign exchange differences	(0.1)	0.0	(0.1)
Continuing underlying Profit before tax	**6.1**	**3.3**	**2.8**

Footnotes on sector NFI

Corresponding to the footnotes on page 10:

1. Following changes in internal management reporting, segments that no longer meet the IFRS 8 quantitative thresholds for separate disclosure (Mobility, Commercial & Professional Skills, InfoSec People and International) have been aggregated within the "Other" segment. Prior-year comparatives have been restated accordingly.

2. During the current year, the basis for adjusting internal revenue was updated to more accurately reflect sector performance. Previously, internal revenue eliminations were allocated across sectors based on each sector's proportion of total revenue; these eliminations are now recorded against the sectors to which the underlying internal revenue relates. Comparative information has been restated to ensure consistency with the current year's presentation.



Gattaca plc
1450 Parkway,
Solent Business Park,
Fareham, Hampshire, PO15 7AF