



شركة الأندية للرياضة
SPORT CLUBS COMPANY

EARNINGS PRESENTATION Q4 & YE 2025

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Operational Highlights



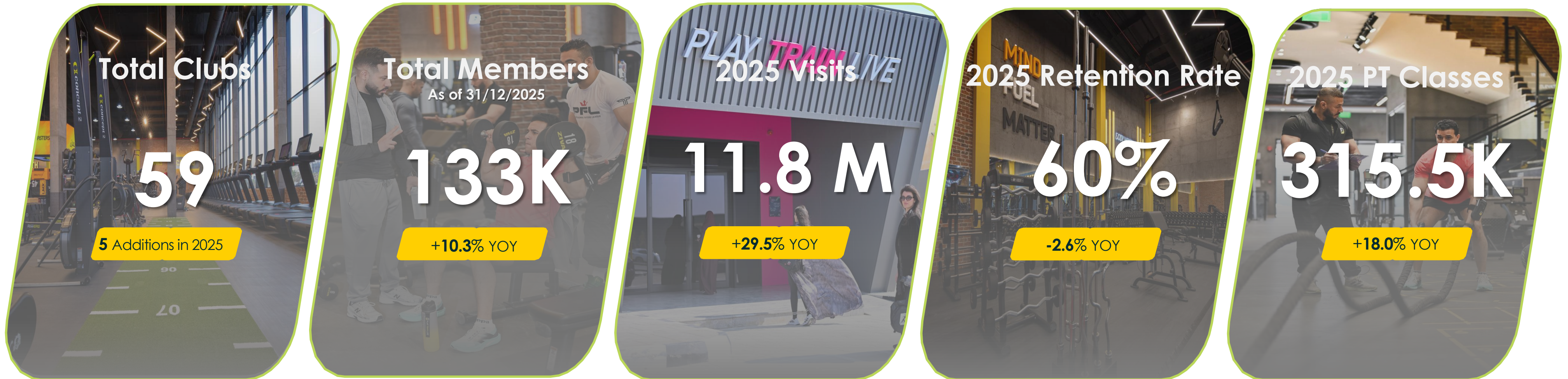
Performance Snapshot

Robust Business With Solid Track Record

	Quarter 4 Figures	12 Months Figures
Revenue Growth	17.1%	14.9%
Gross Profit Margin	33.0%	29.9%
Net Income Margin	14.0%	10.9%
EBITDA Margin	41.7%	39.4%

Performance Snapshot

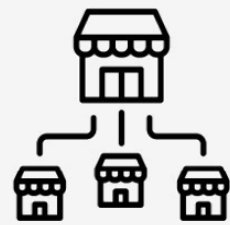
Larger base, more visits, broader reach!



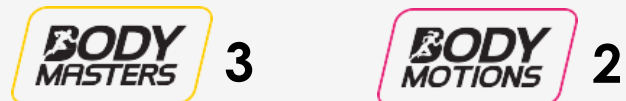
Expanding Footprint: Solid Pipeline & Clear Execution.

Where We Are

59 Clubs

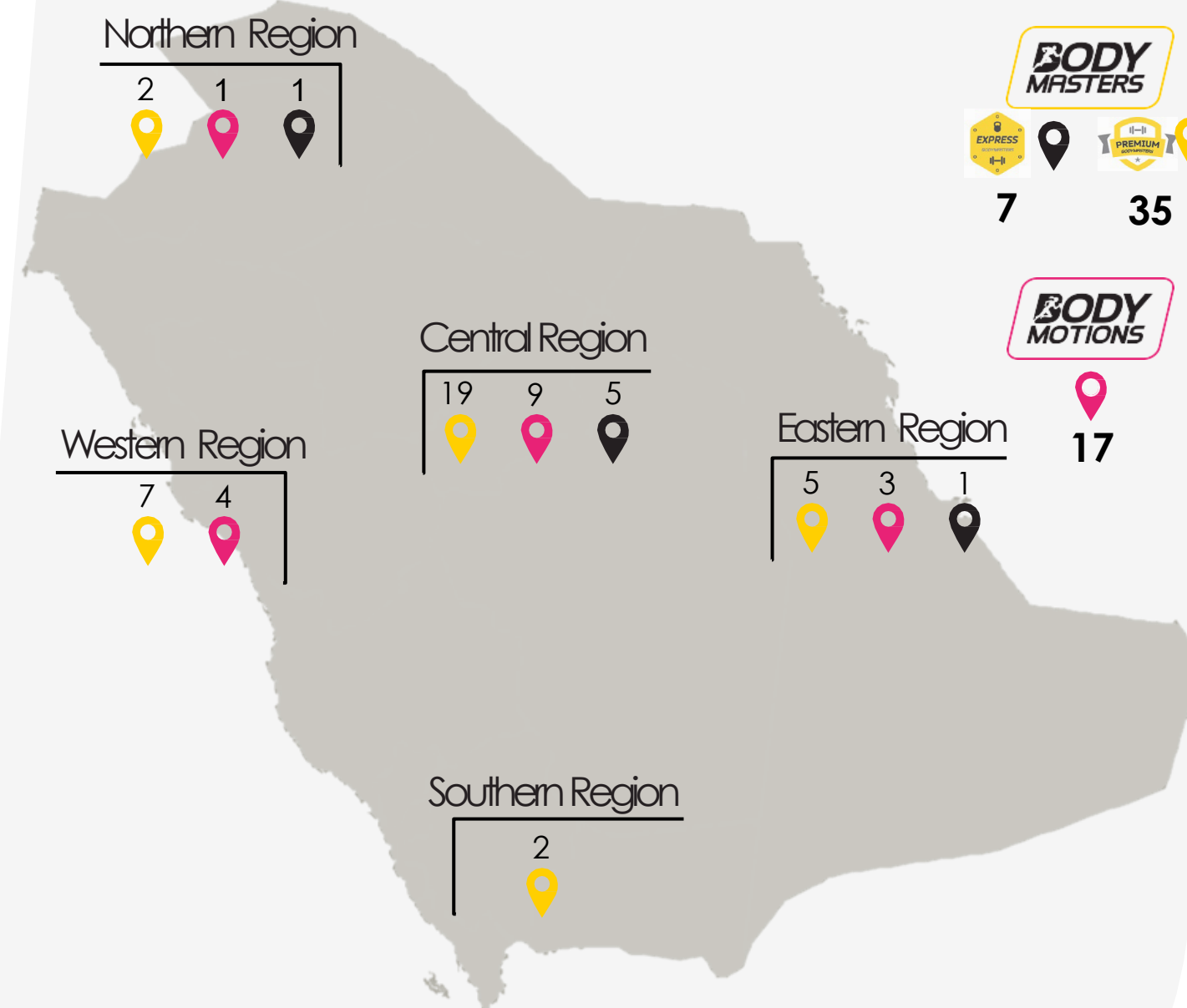


5 Opening From the beginning of 2025

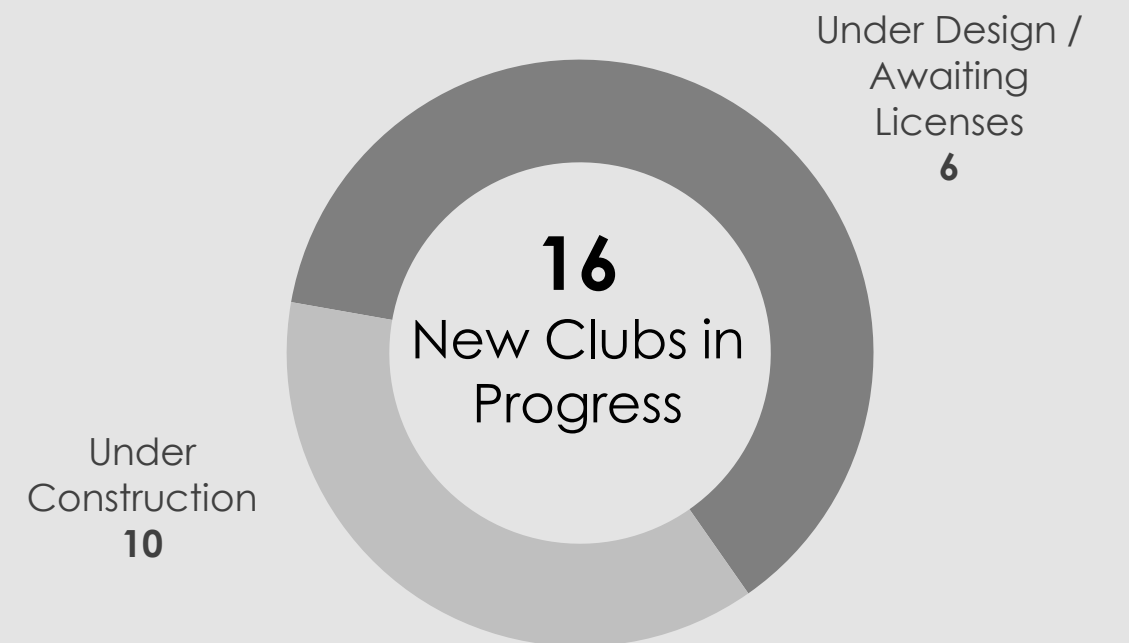


2 Body Masters Clubs Reopened During 2025 After Refurbishment

Footprint By Region



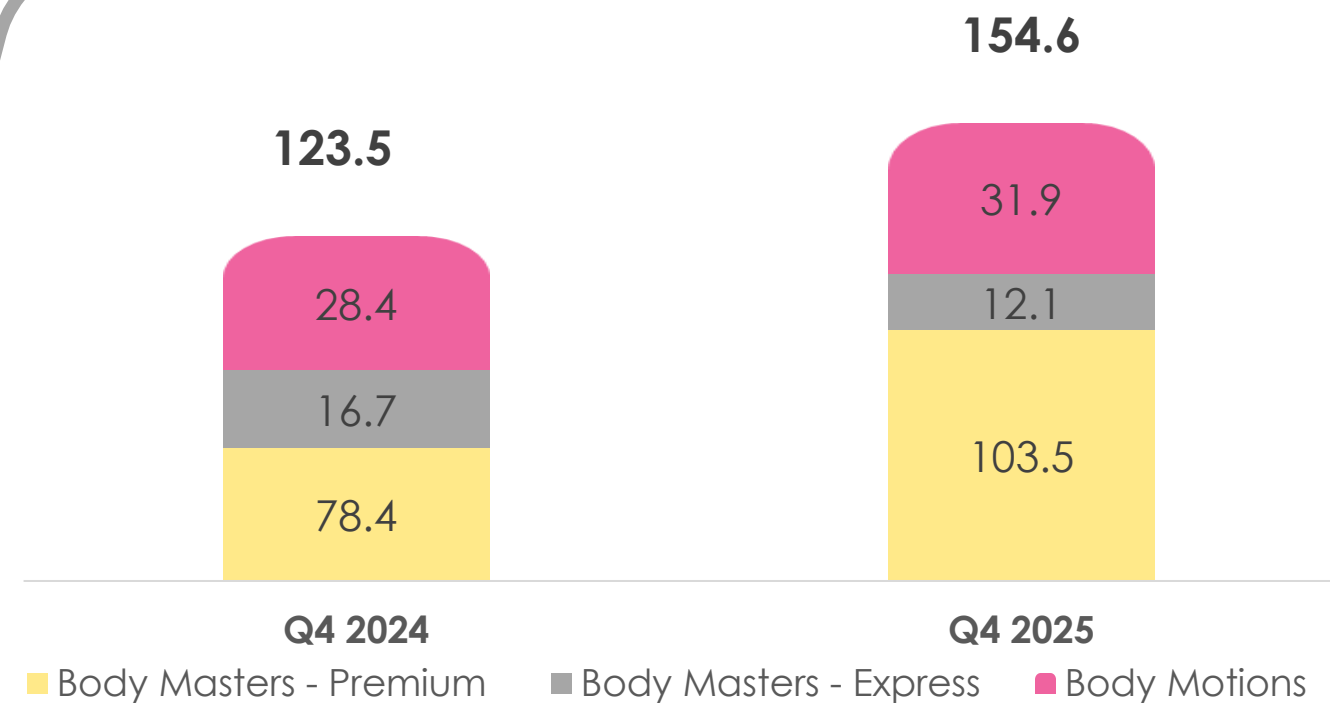
Pipeline



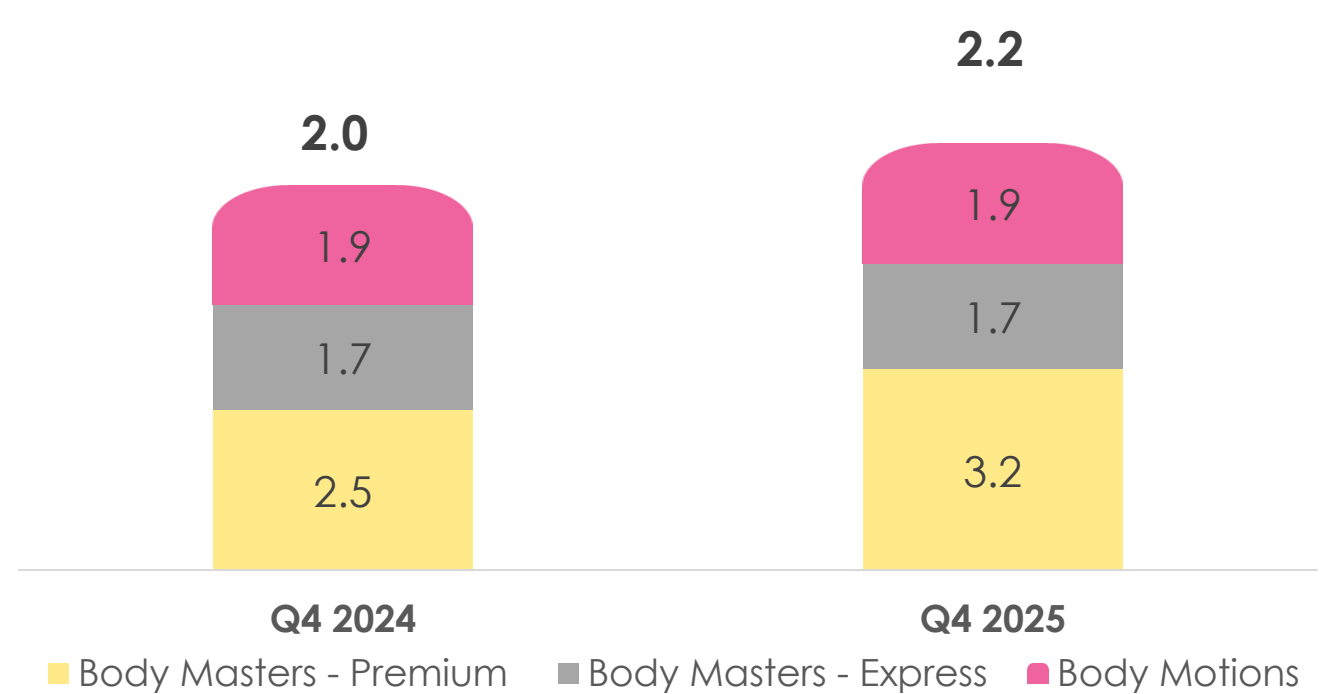
Those clubs are expected to open within the next 14 months.

Our New Identity Impact: Stronger Scale and Engagement Across the Network.

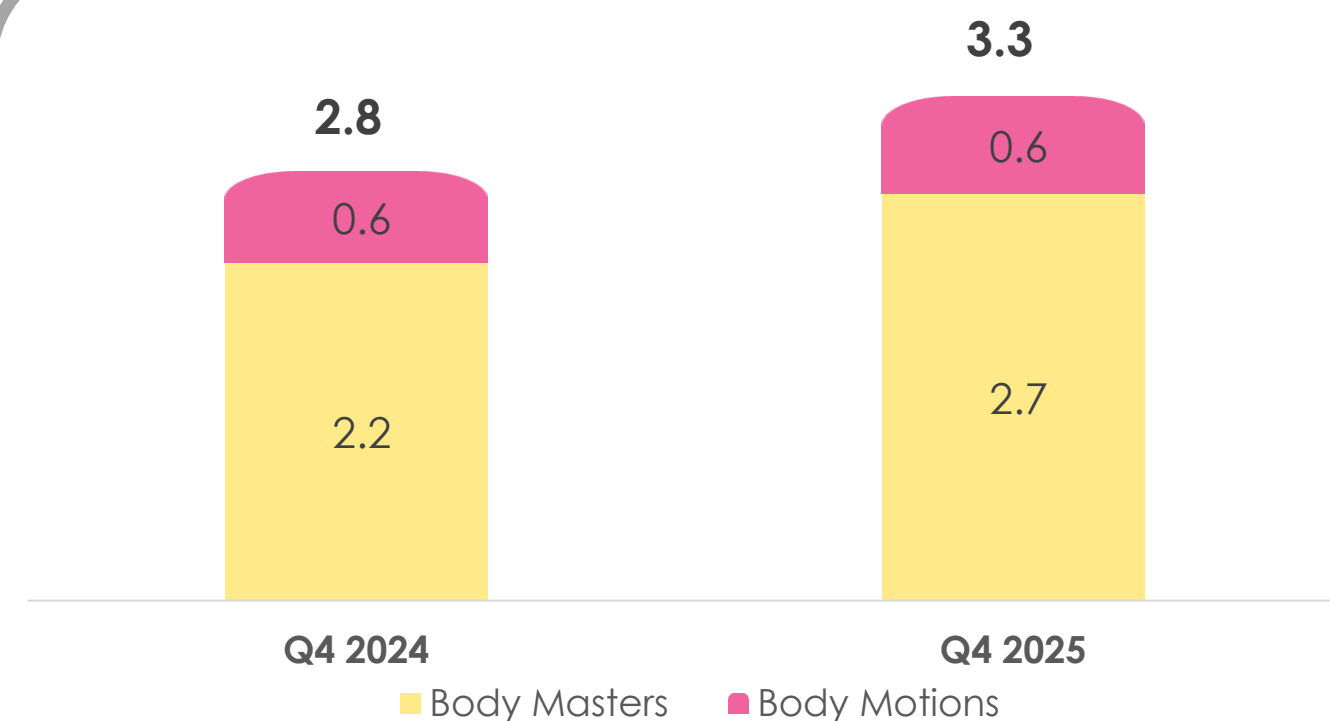
Average Q4 Member Base Growing (Thousands)



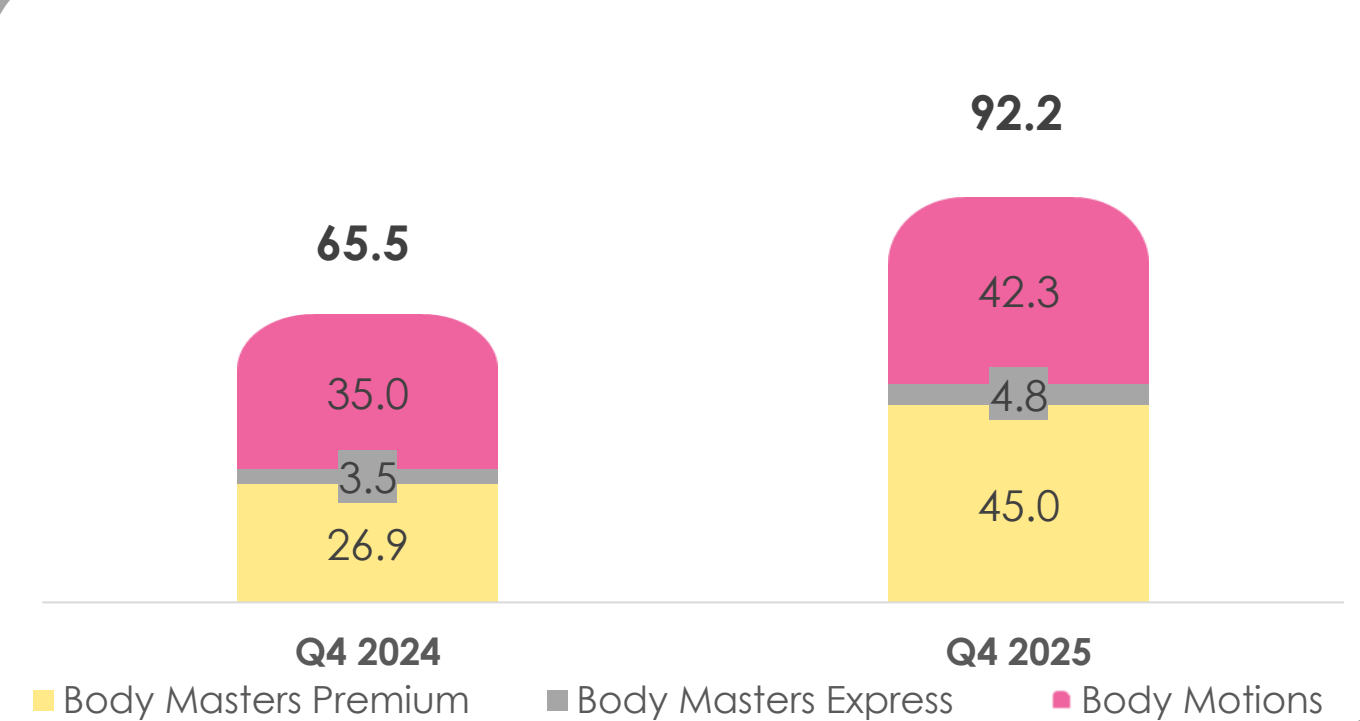
.. And Higher Average Members per Club (Thousands)



More Visits (Millions)

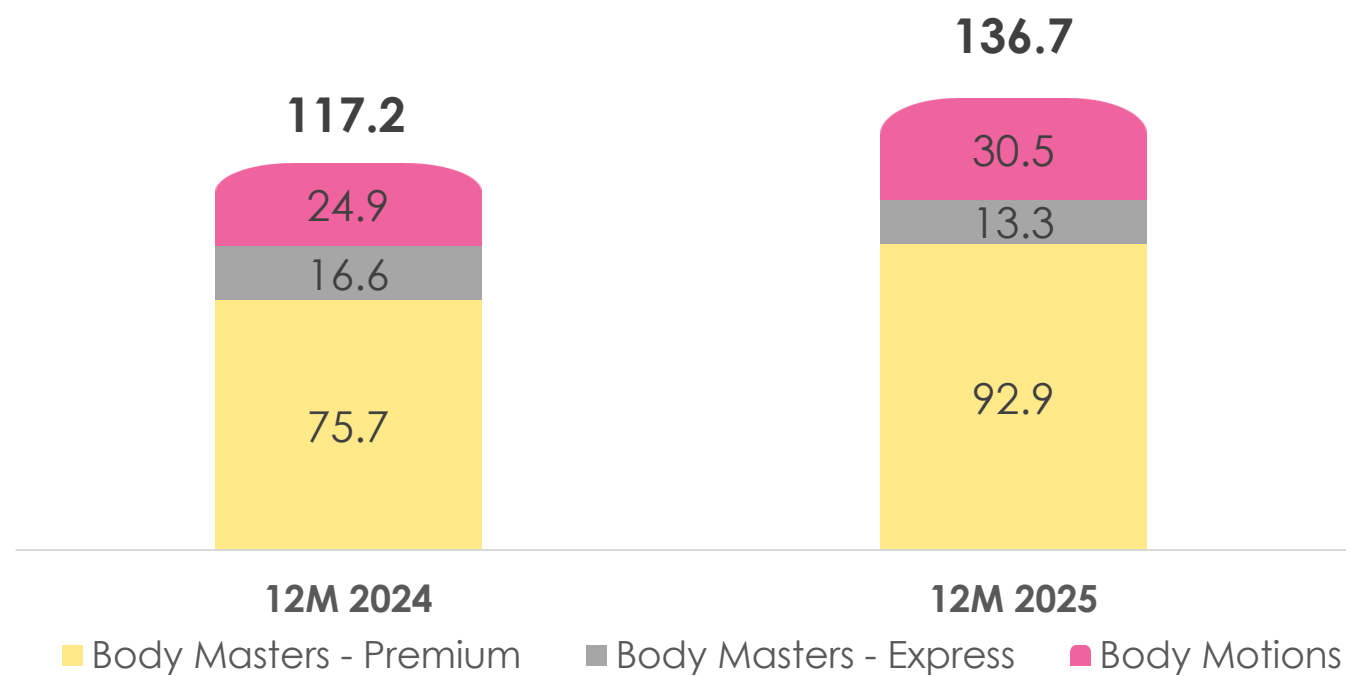


.. PT Sessions Up (Thousands)

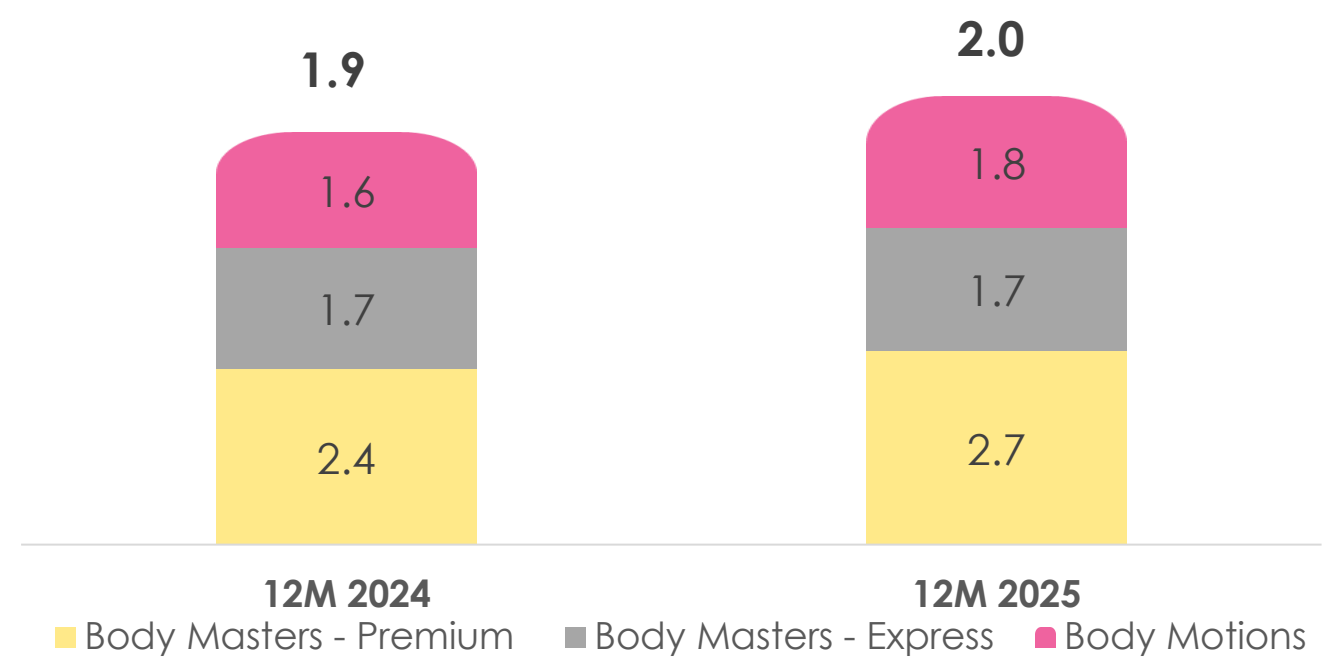


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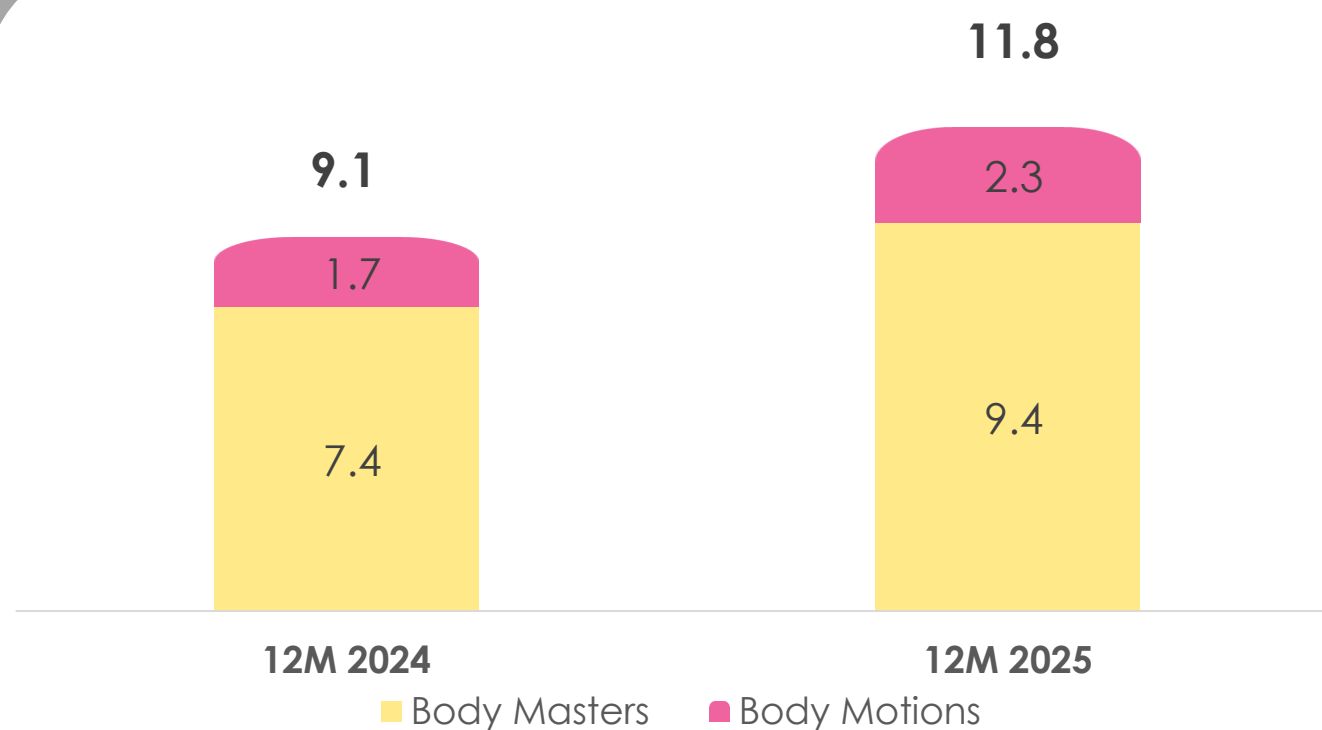
Average 12M Member Base Growing (Thousands)



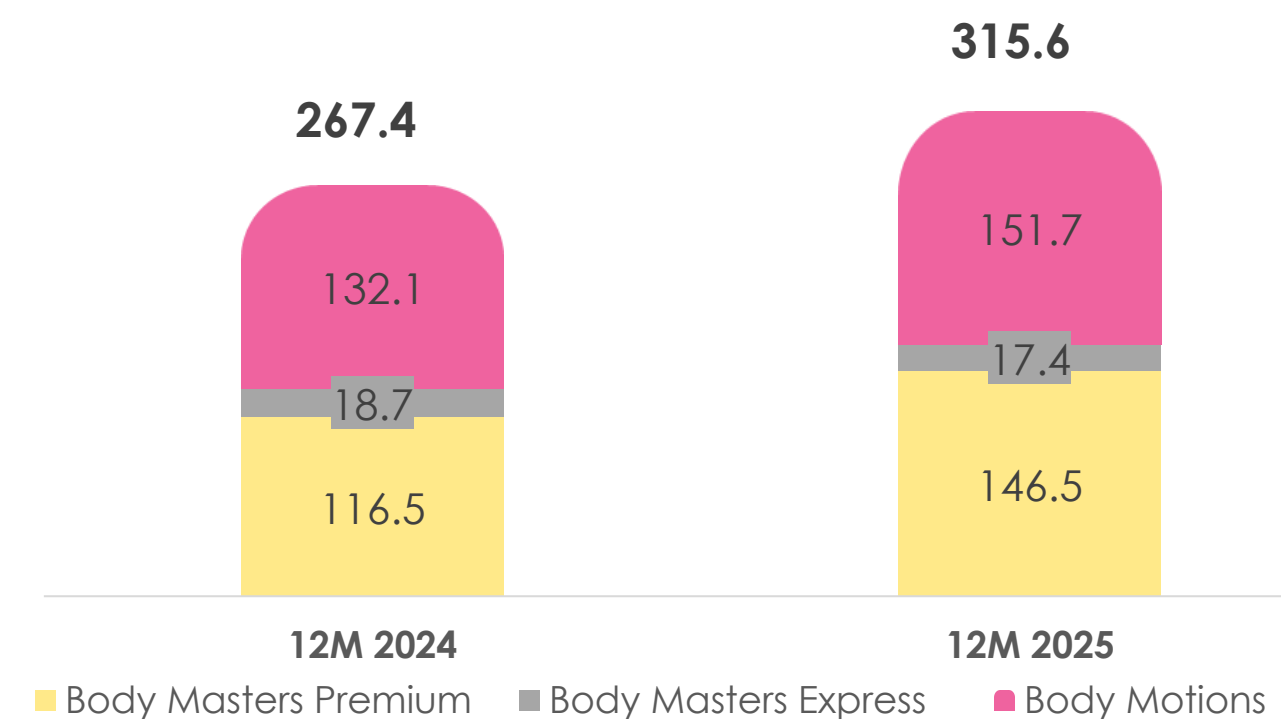
.. And Higher Average Members per Club (Thousands)



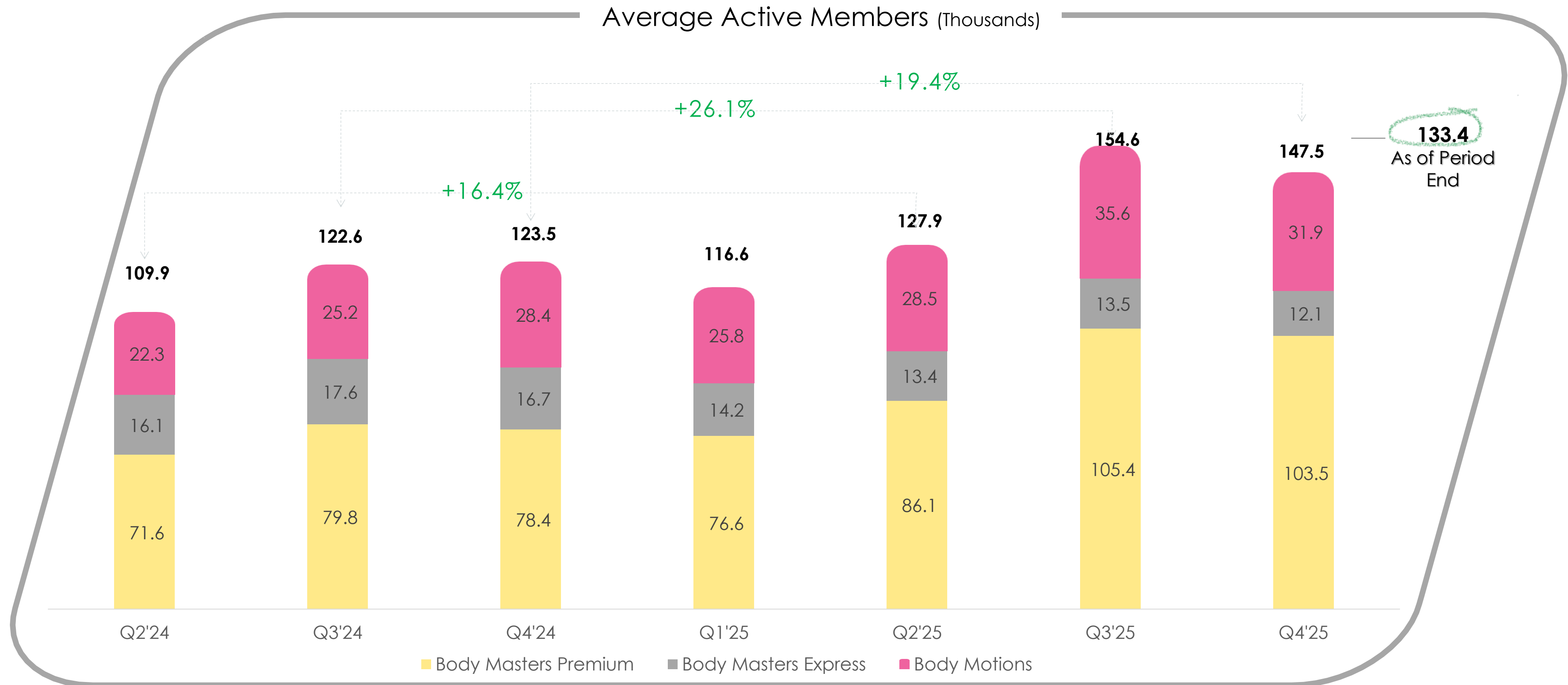
More Visits (Millions)



.. PT Sessions Up (Thousands)

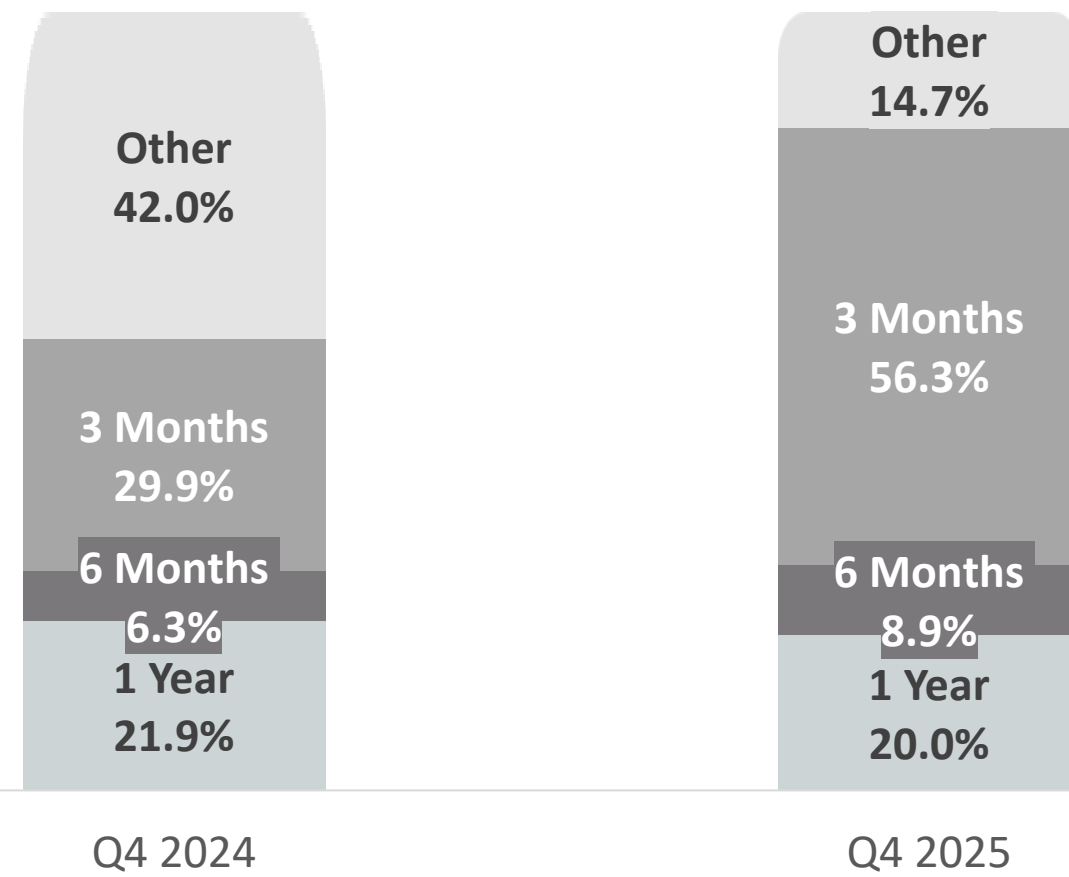


Quarterly Average Number of Members Expansion.

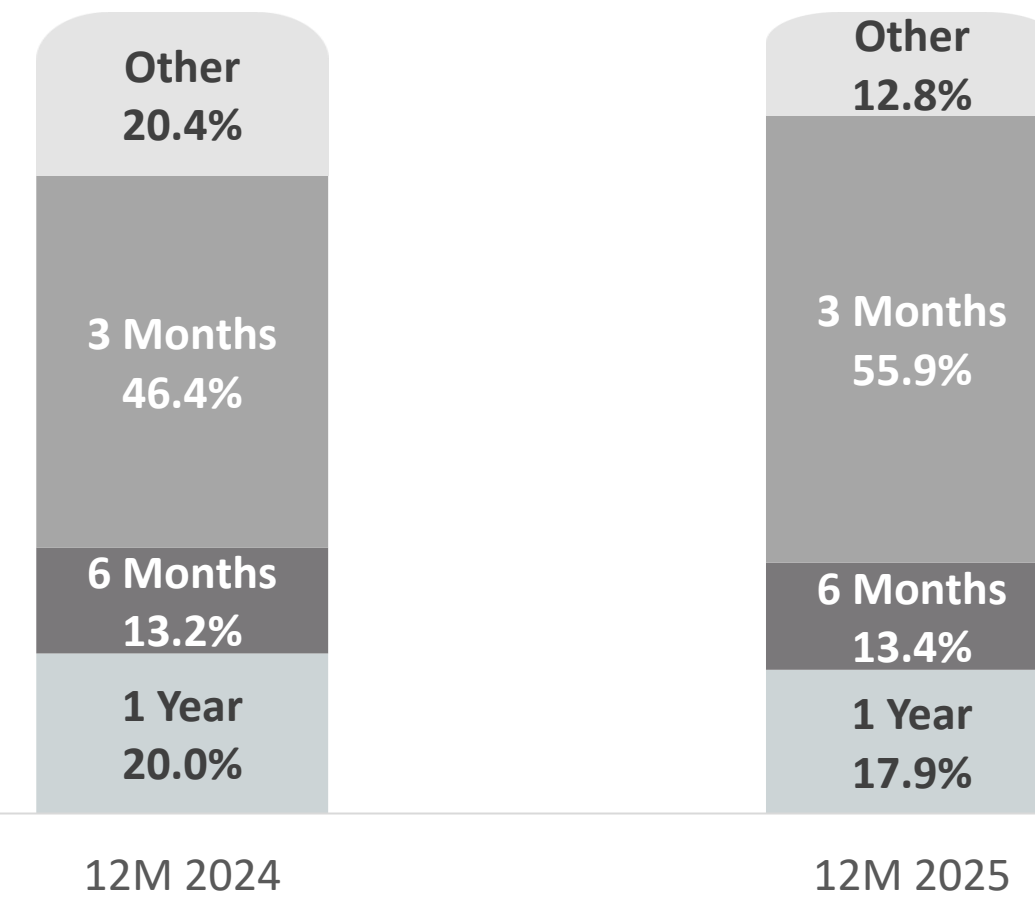


Subscription Units Mix.

Sold Subscriptions By Units for Q4 (Thousands)



Sold Subscriptions By Units for 12M (Thousands)



Financial Section

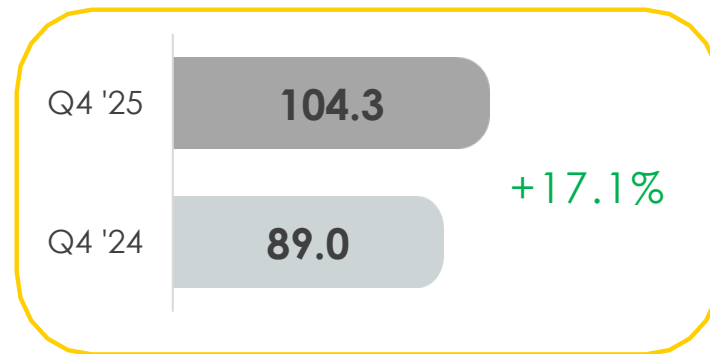


Stronger Results, Stronger Foundation.

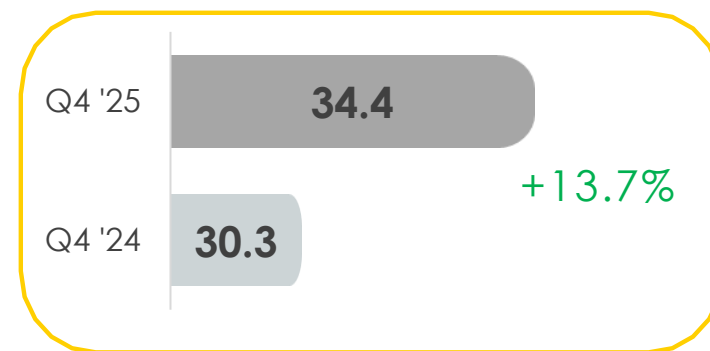
ROBUST BUSINESS WITH SOLID TRACK RECORD

Quarter 4 Figures (Millions)

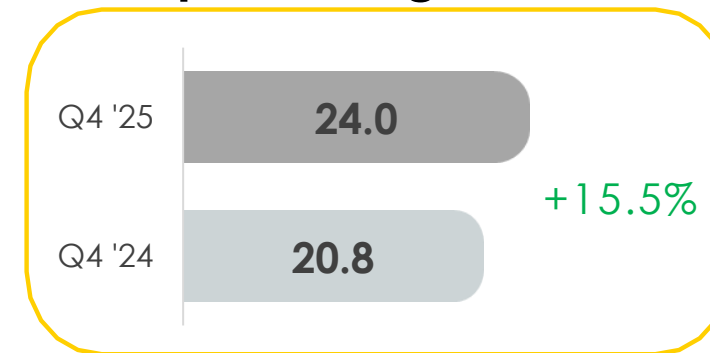
Revenue



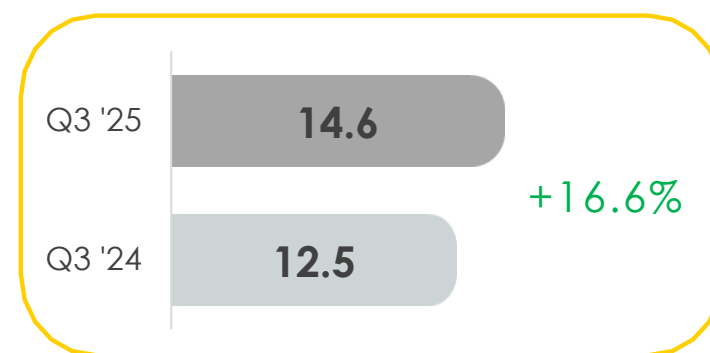
Gross Profit



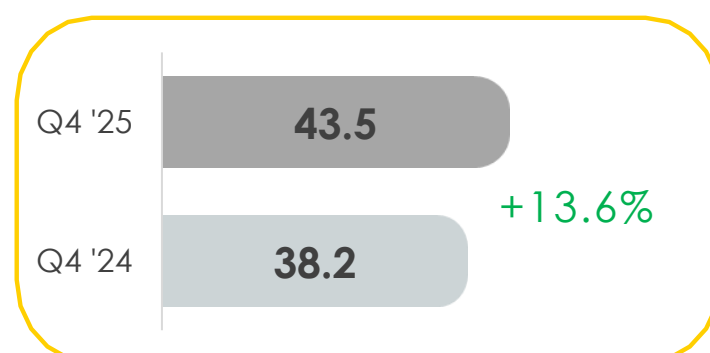
Operating Profit



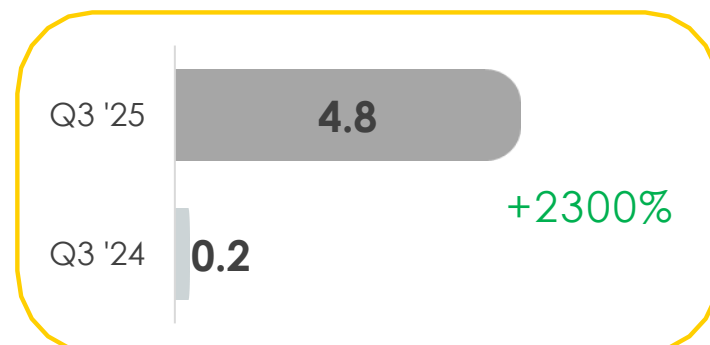
Net Income



EBITDA

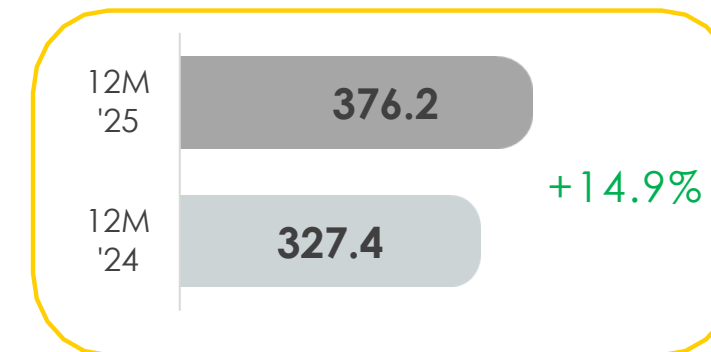


Free Cash Flow

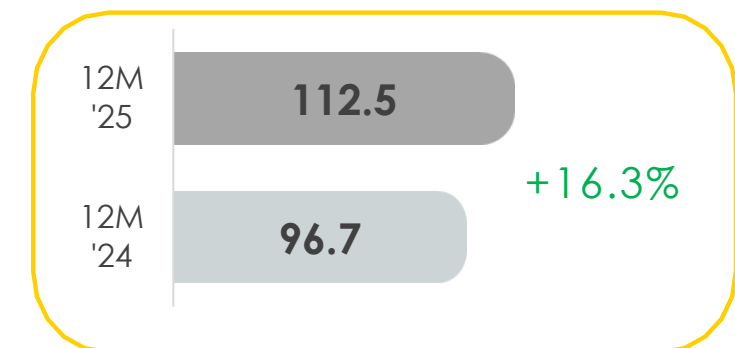


12 Months Figures (Millions)

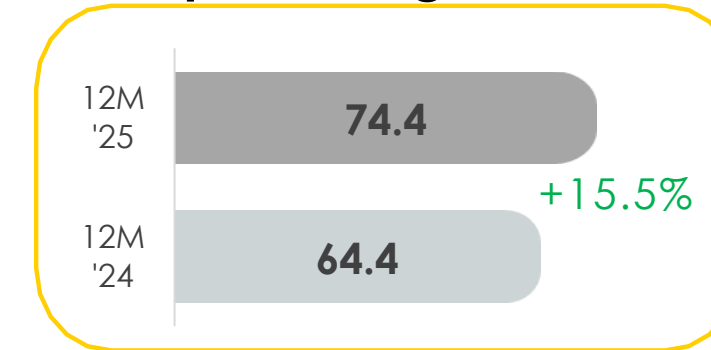
Revenue



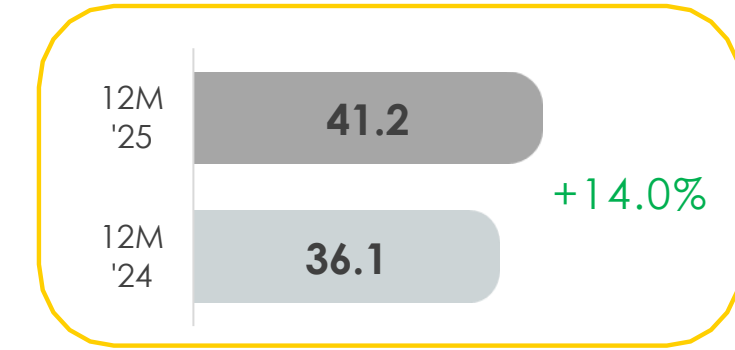
Gross Profit



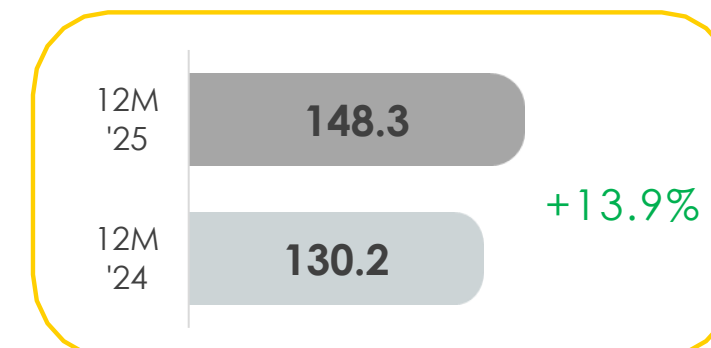
Operating Profit



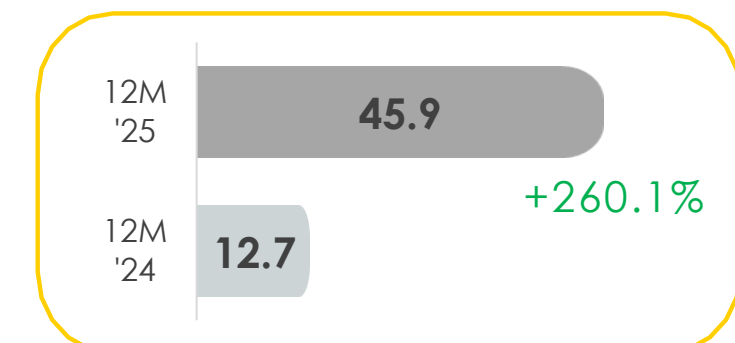
Net Income



EBITDA

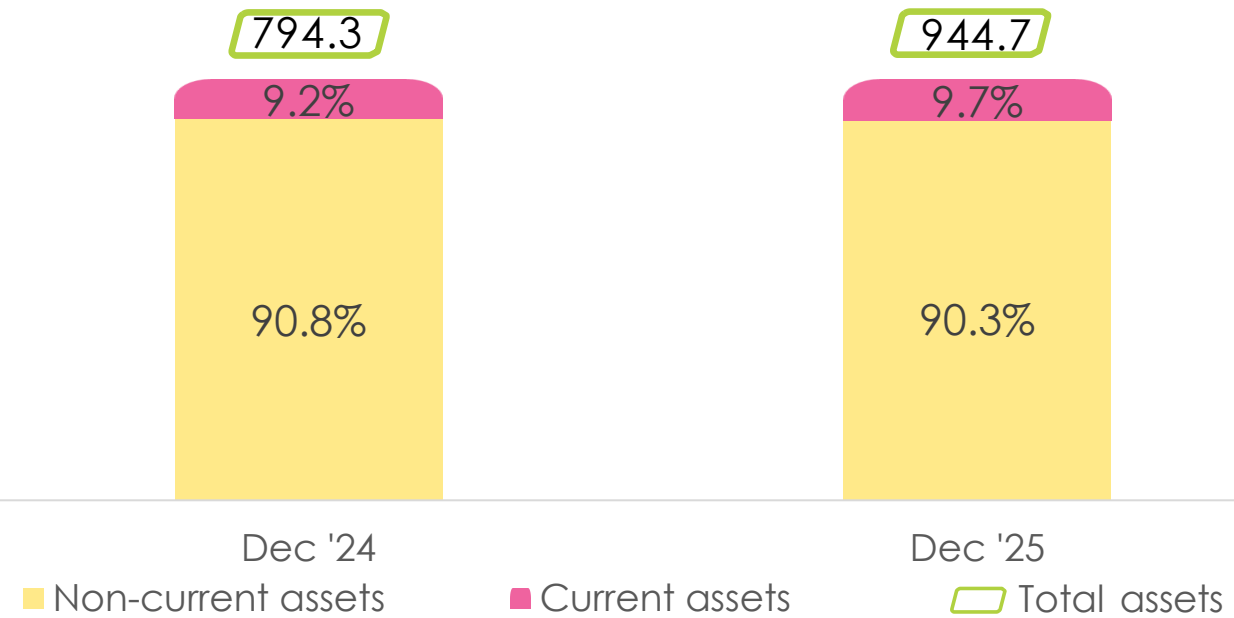


Free Cash Flow

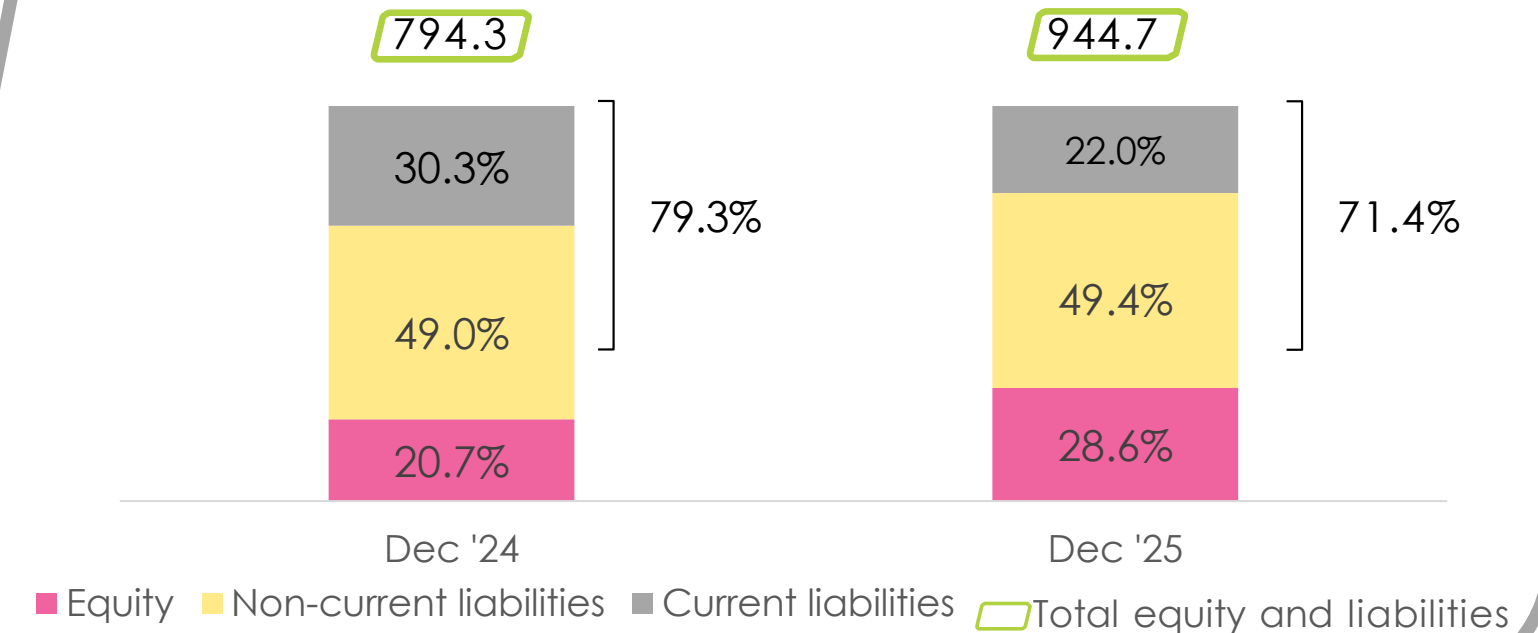


Stronger Results, Stronger Foundation.

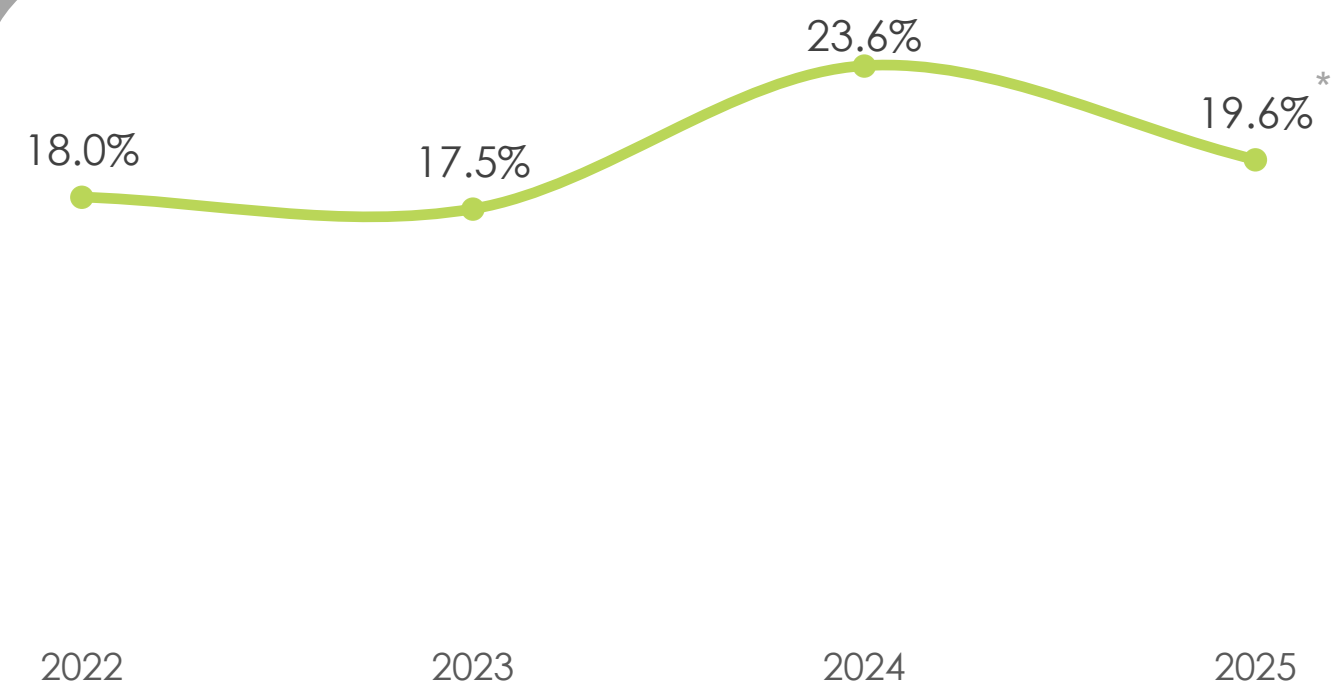
Total Assets (Millions)



Total Equity and Liabilities (Millions)

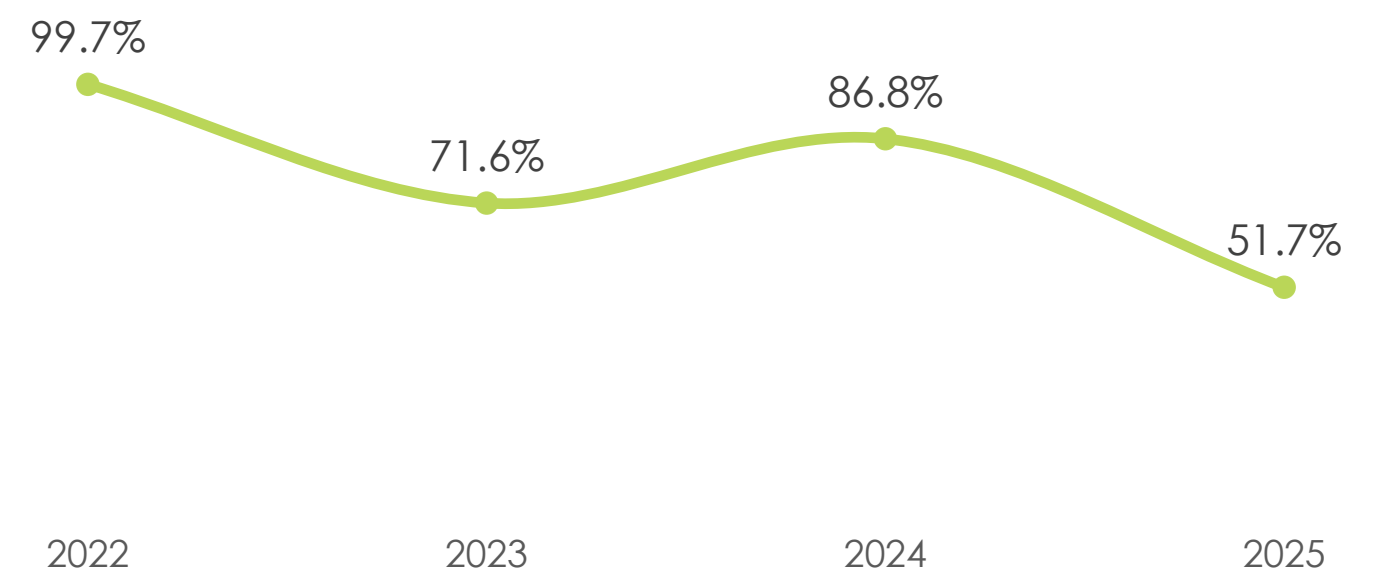


Return on Equity

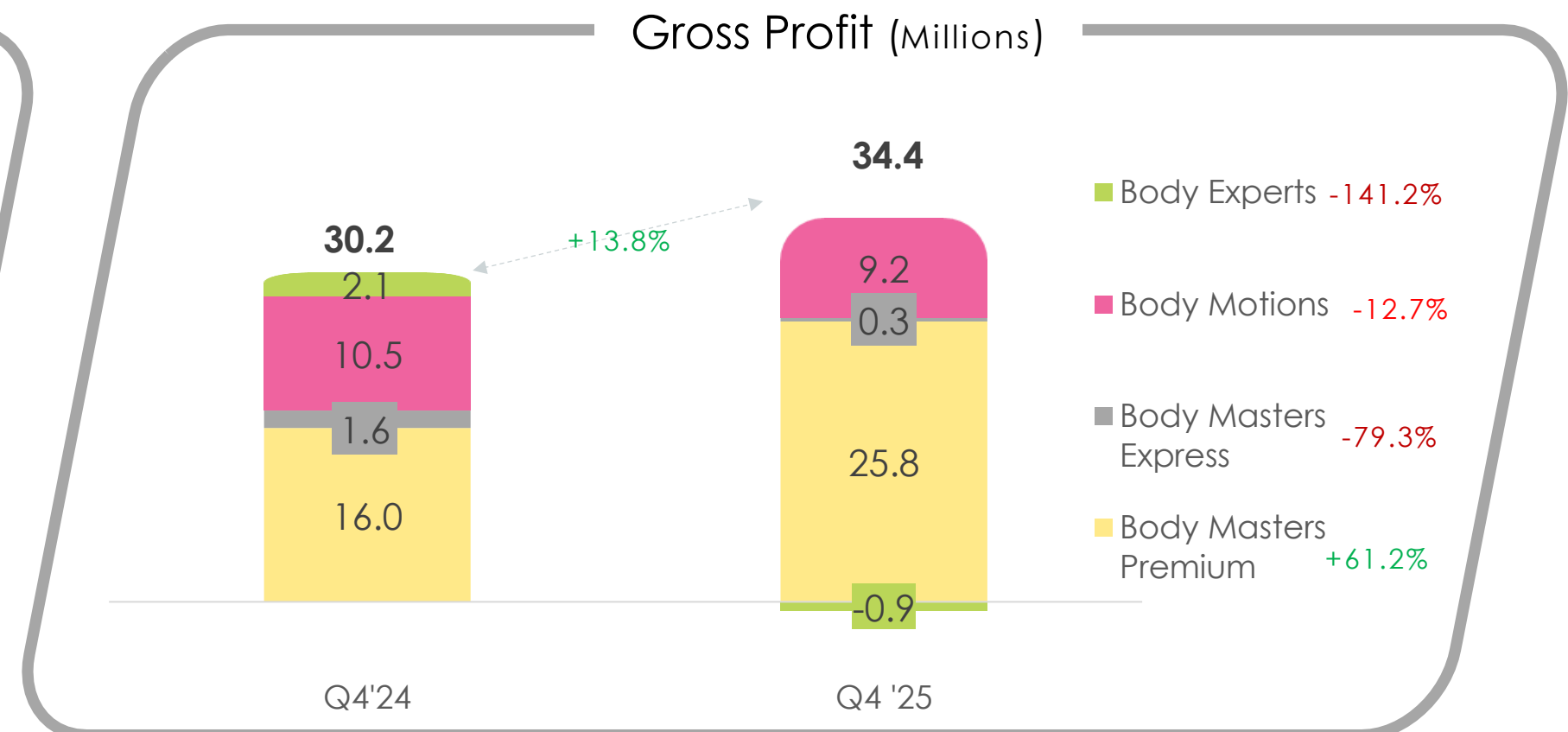
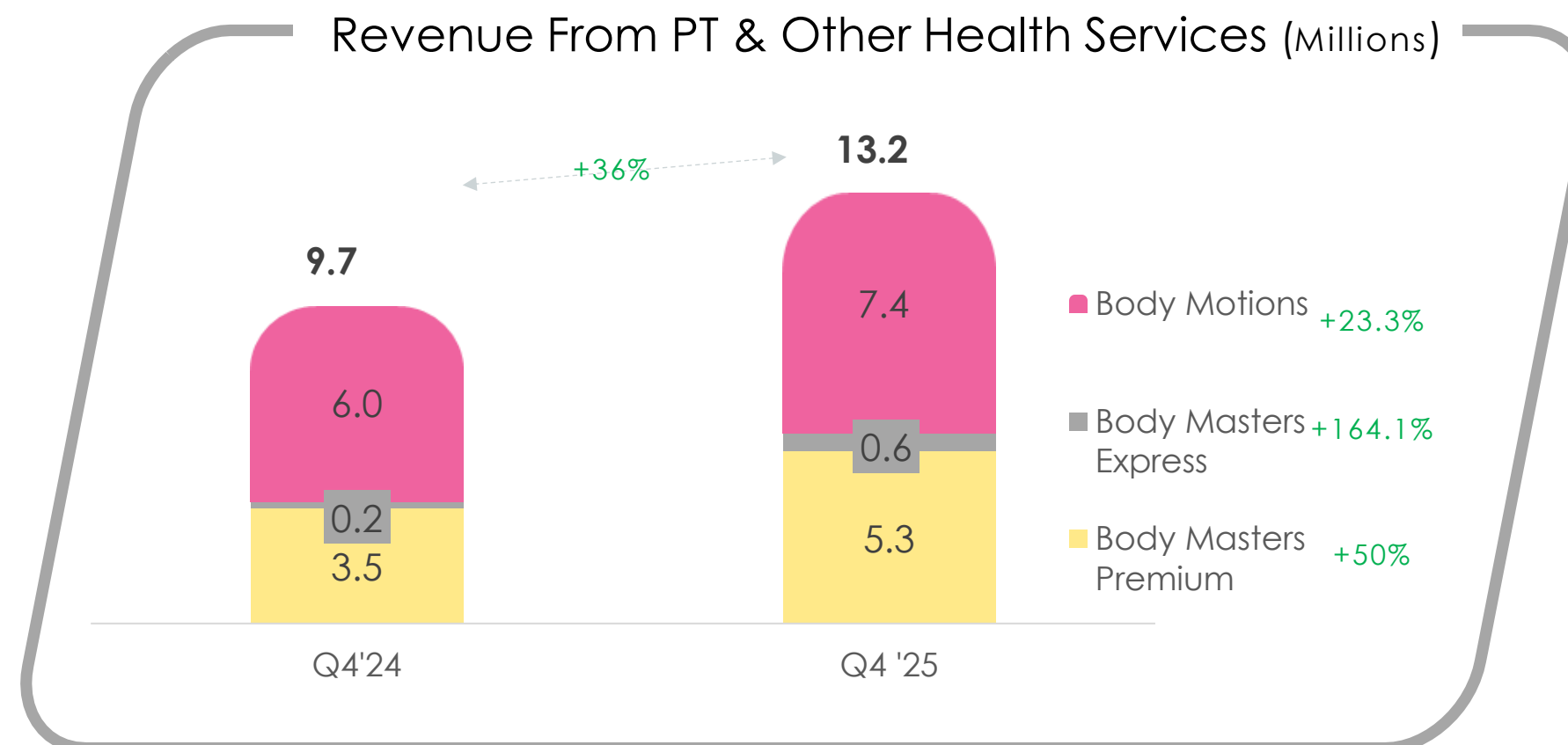
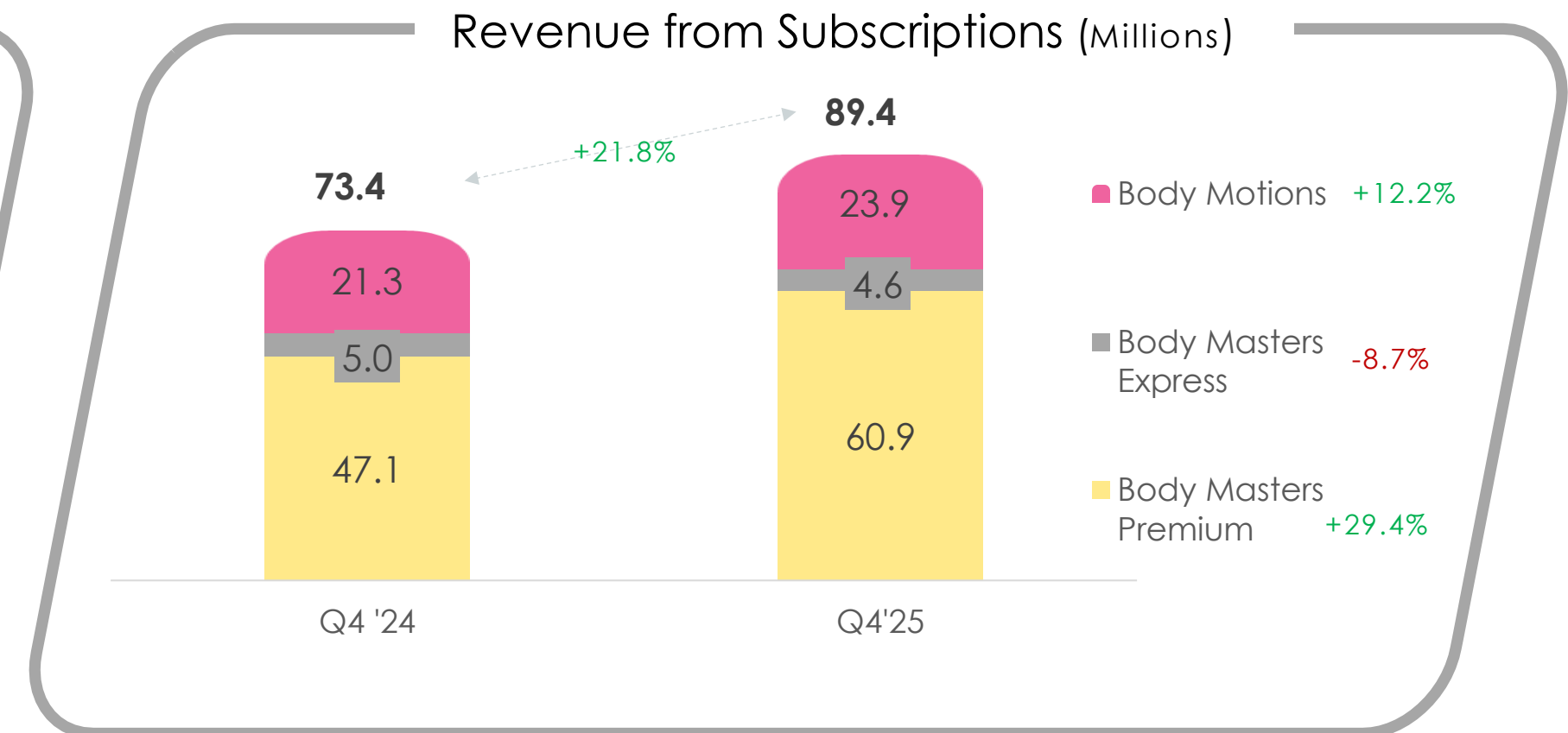
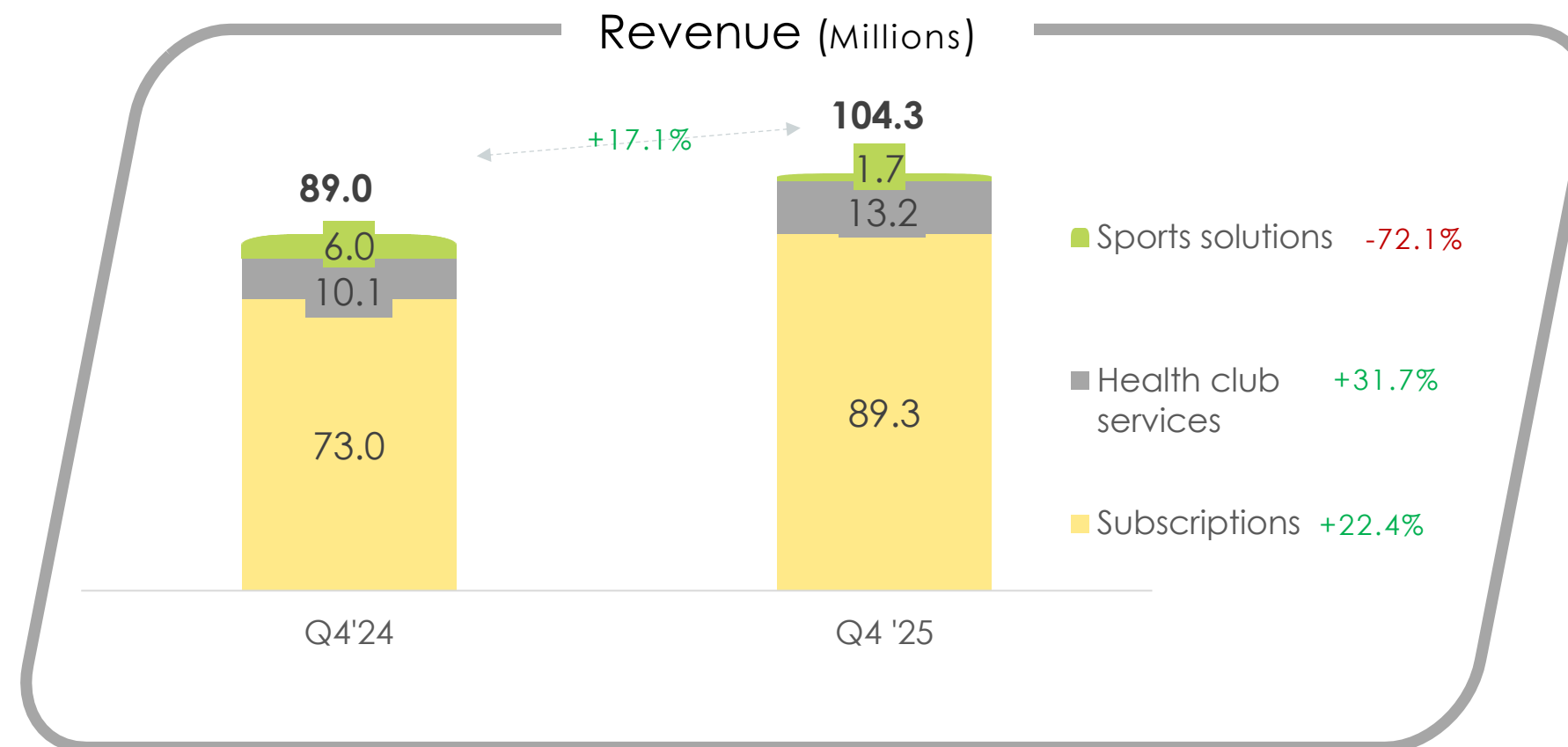


* Calculated based on weighted average IPO proceeds impact to the equity.

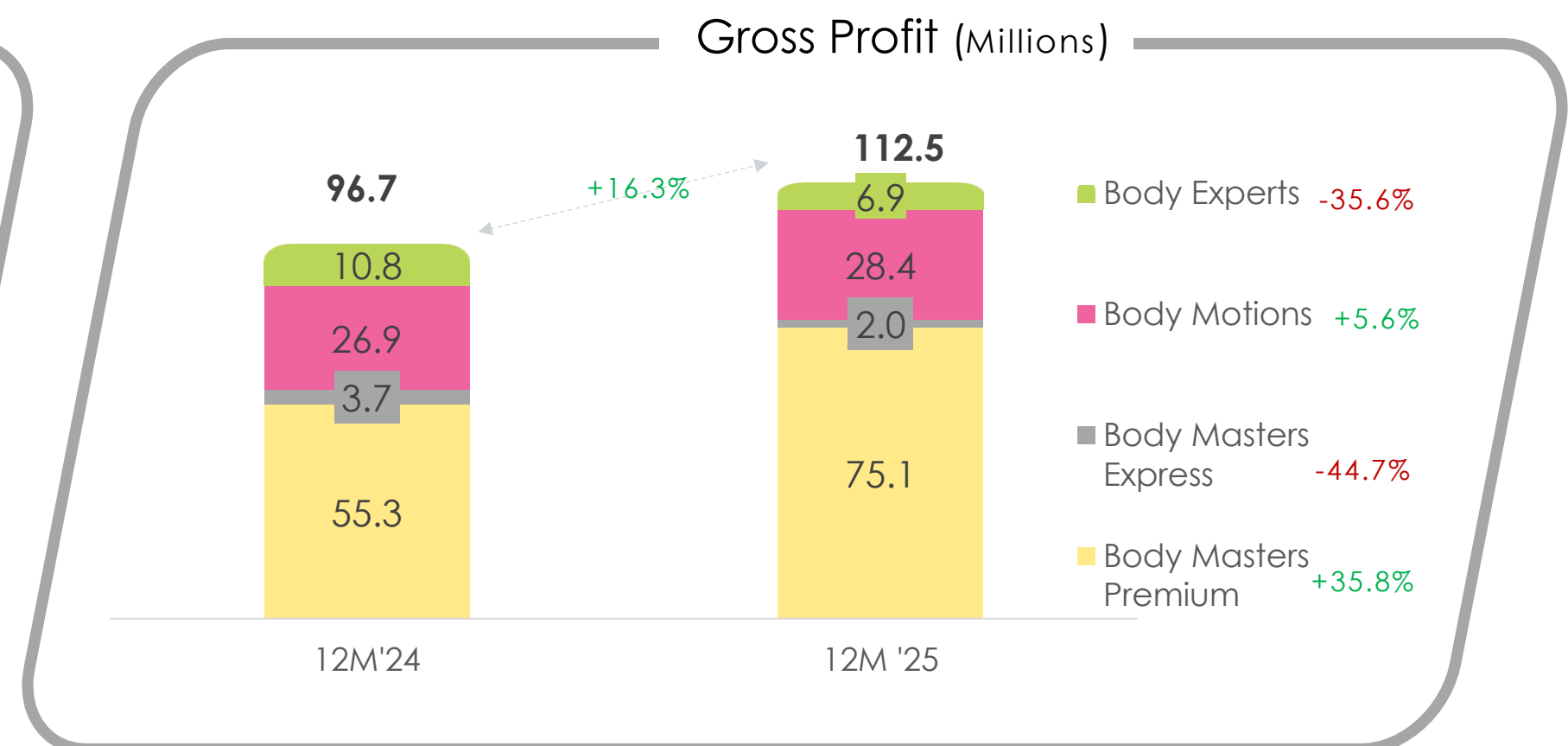
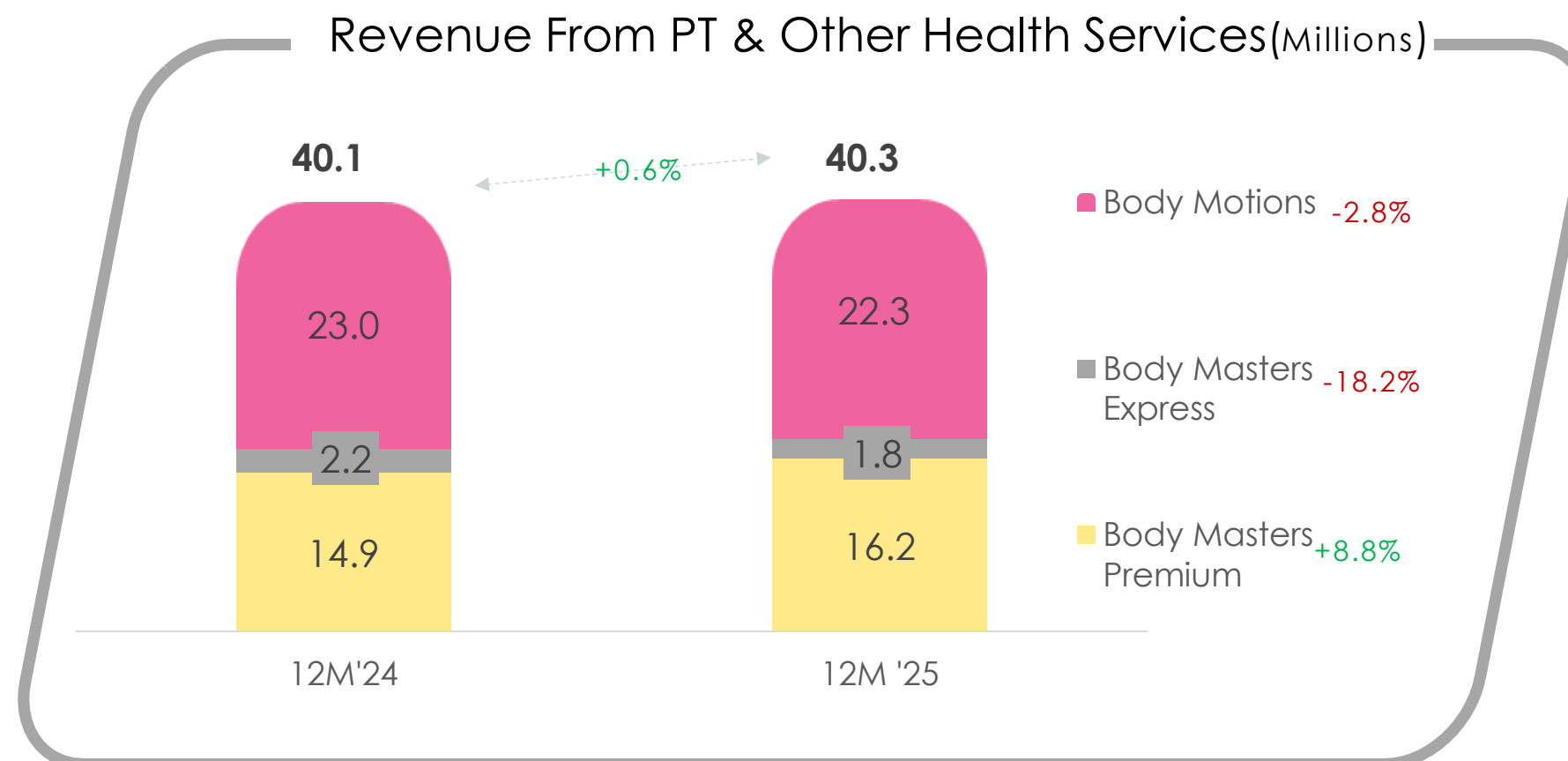
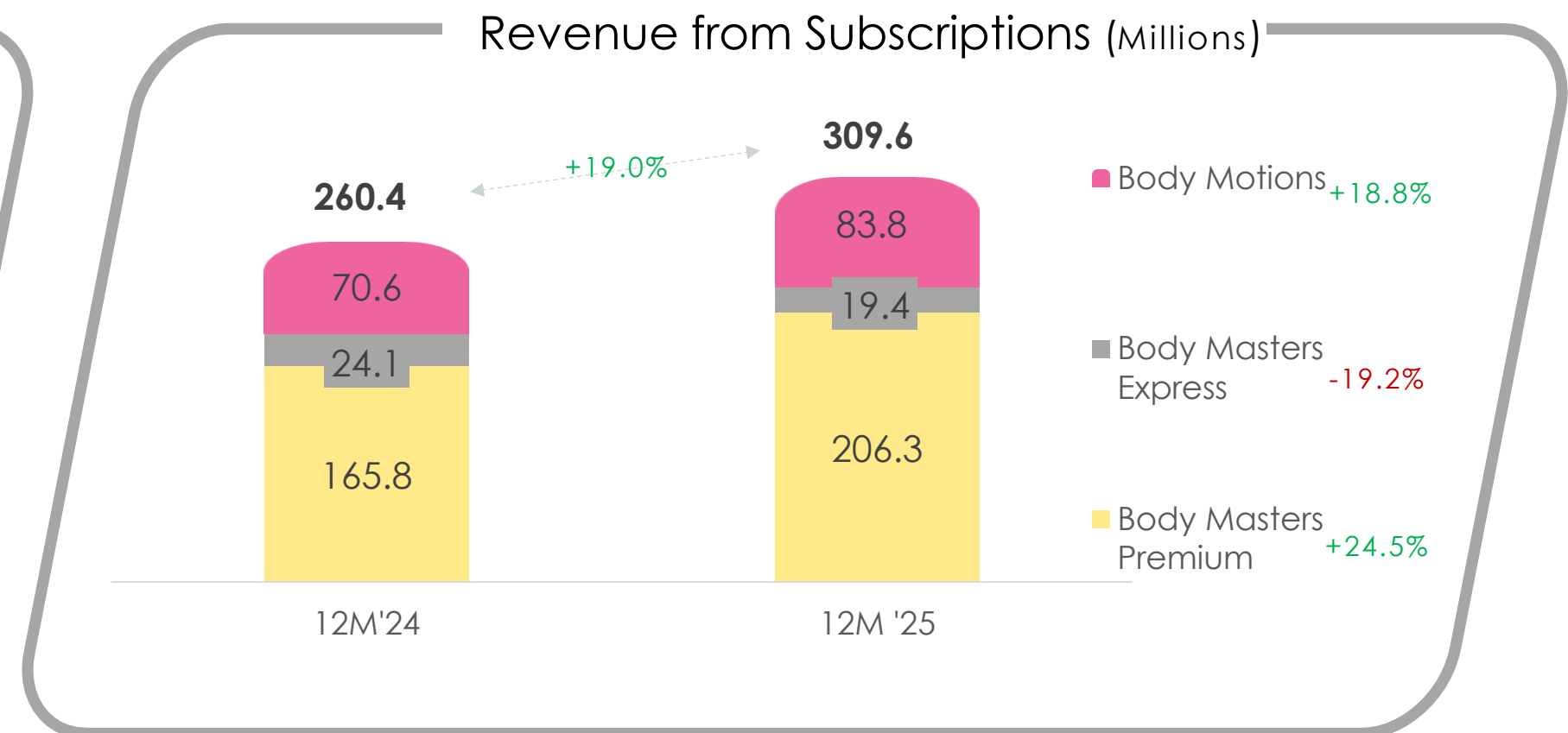
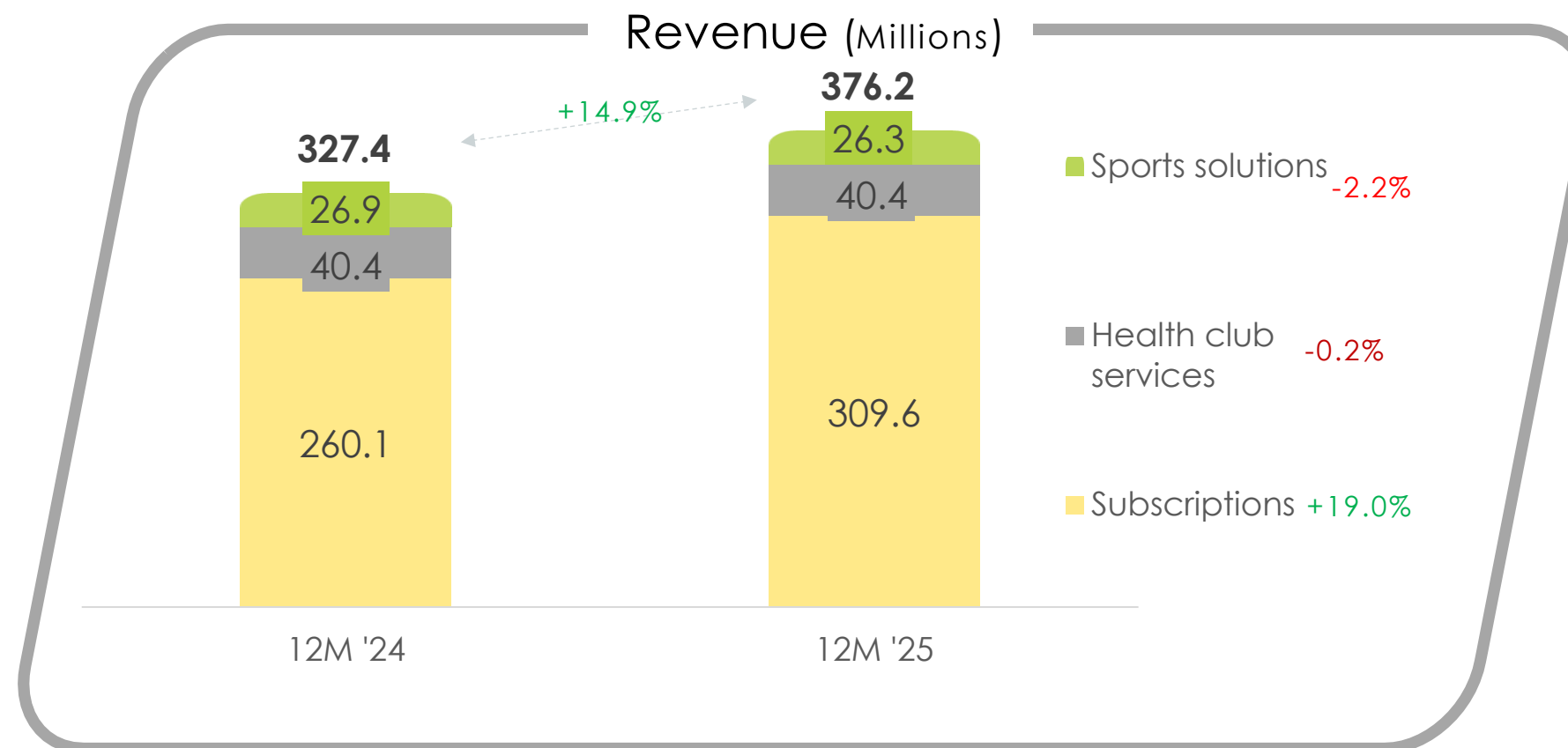
Debt to Equity



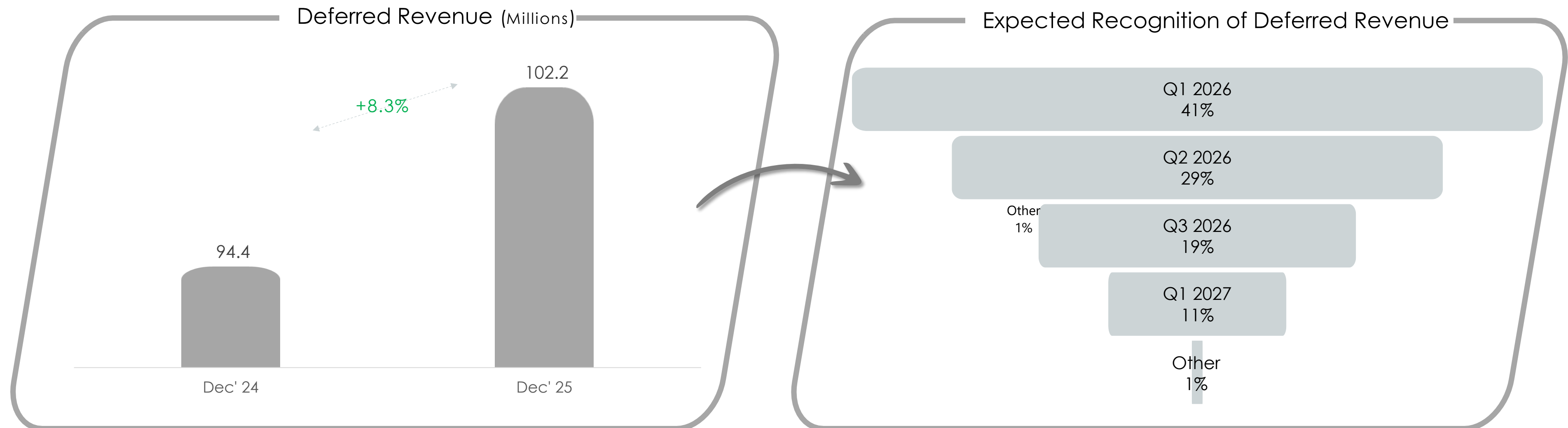
Stronger Revenue Mix with Broad-Based GP Improvement.



Stronger Revenue Mix with Broad-Based GP Improvement.

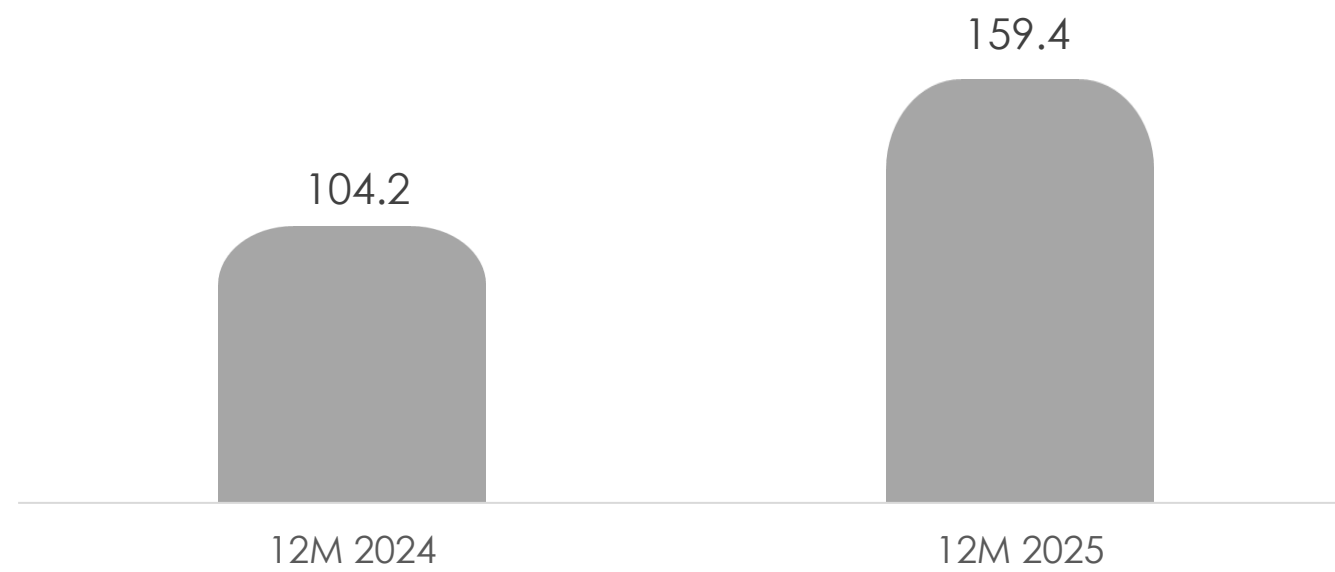


High Deferred Revenue With Strong Forward Coverage.

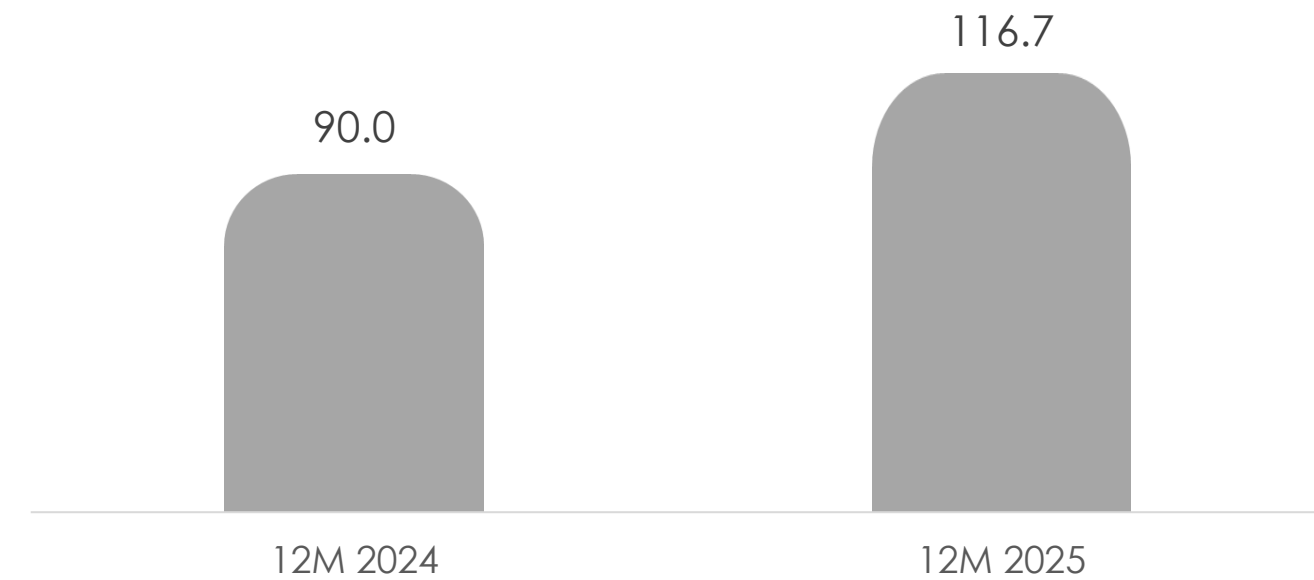


Healthy Operating Cash Generation Lifted Net Cash Despite Increased Expansion Capex.

Cash Generated From Operating Activities (Millions)



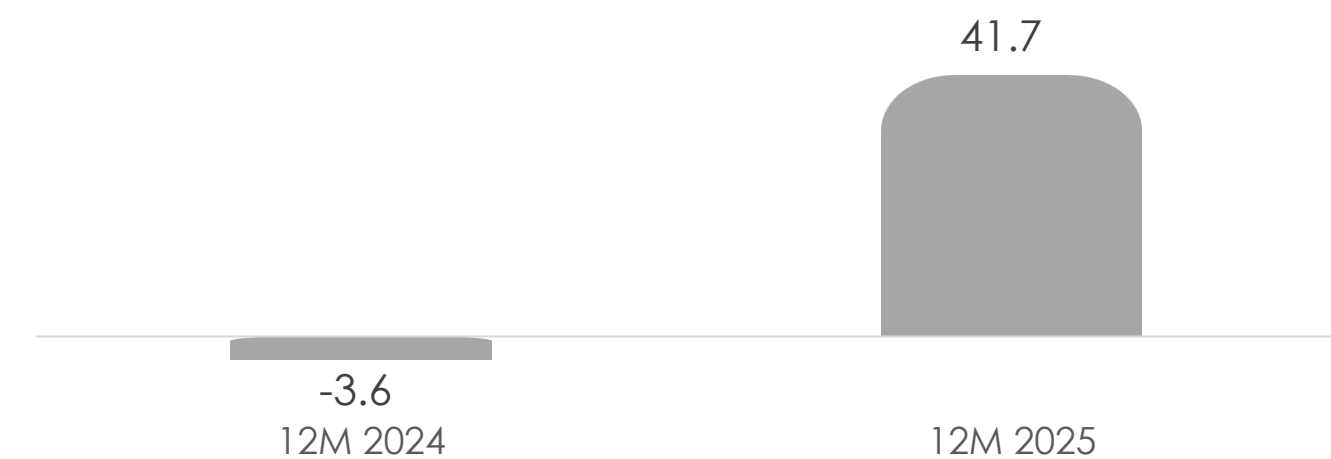
Cash **(used in)** Investing Activities (Millions)



Cash **(used in)** Financing Activities (Millions)



Net cash generated (Millions)



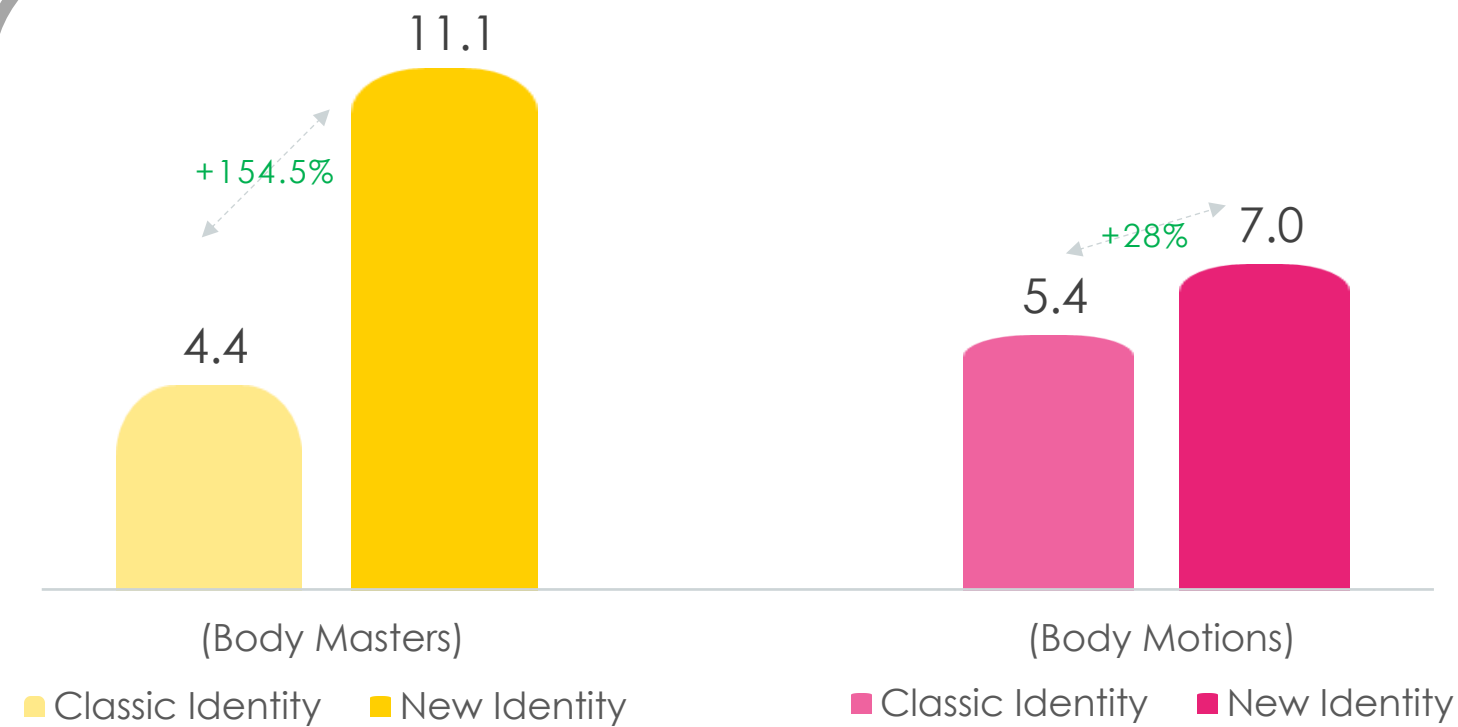


New Identity Clubs Performance

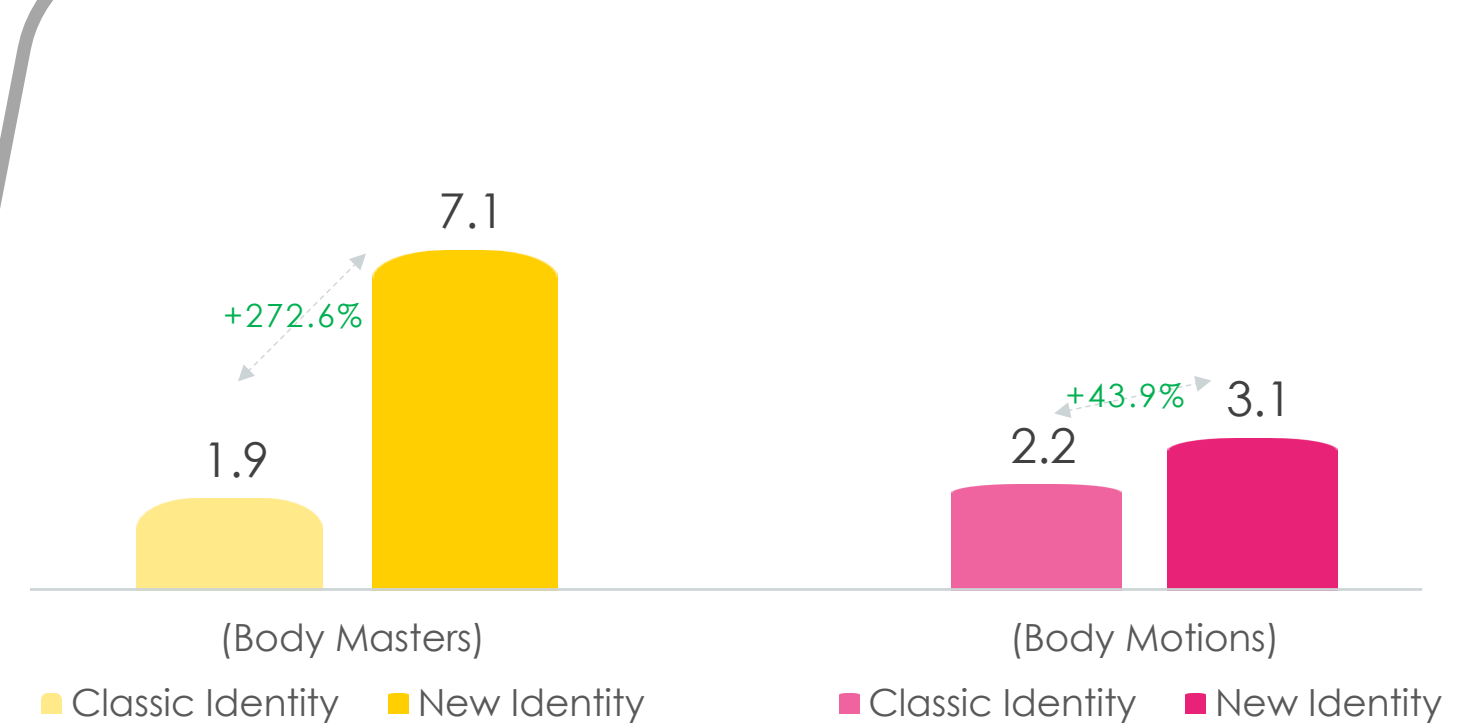


Rebranding Strategy Paying Off!, Strong Performance Across Metrics.

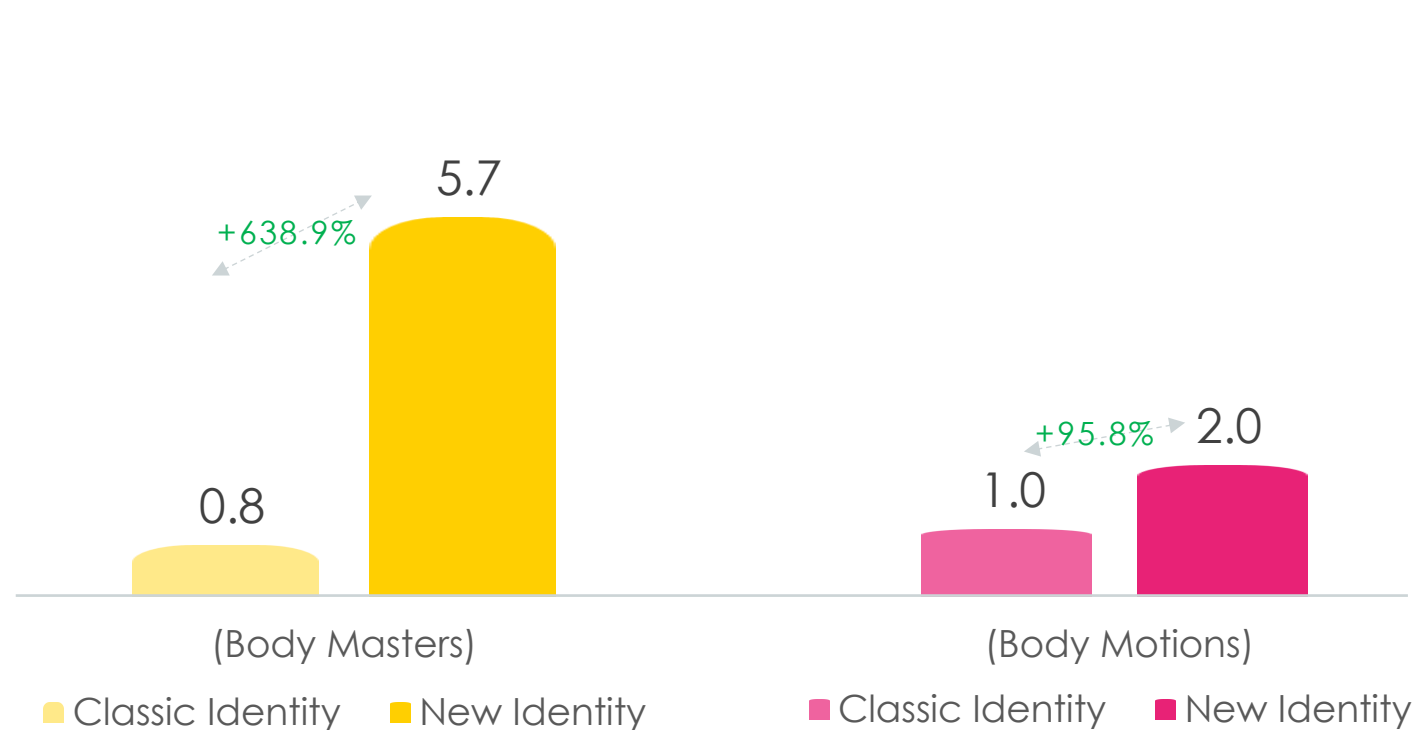
12M'25 Revenue Per Club Performance (Millions)



12M'25 EBITDA Per Club Performance (Millions)

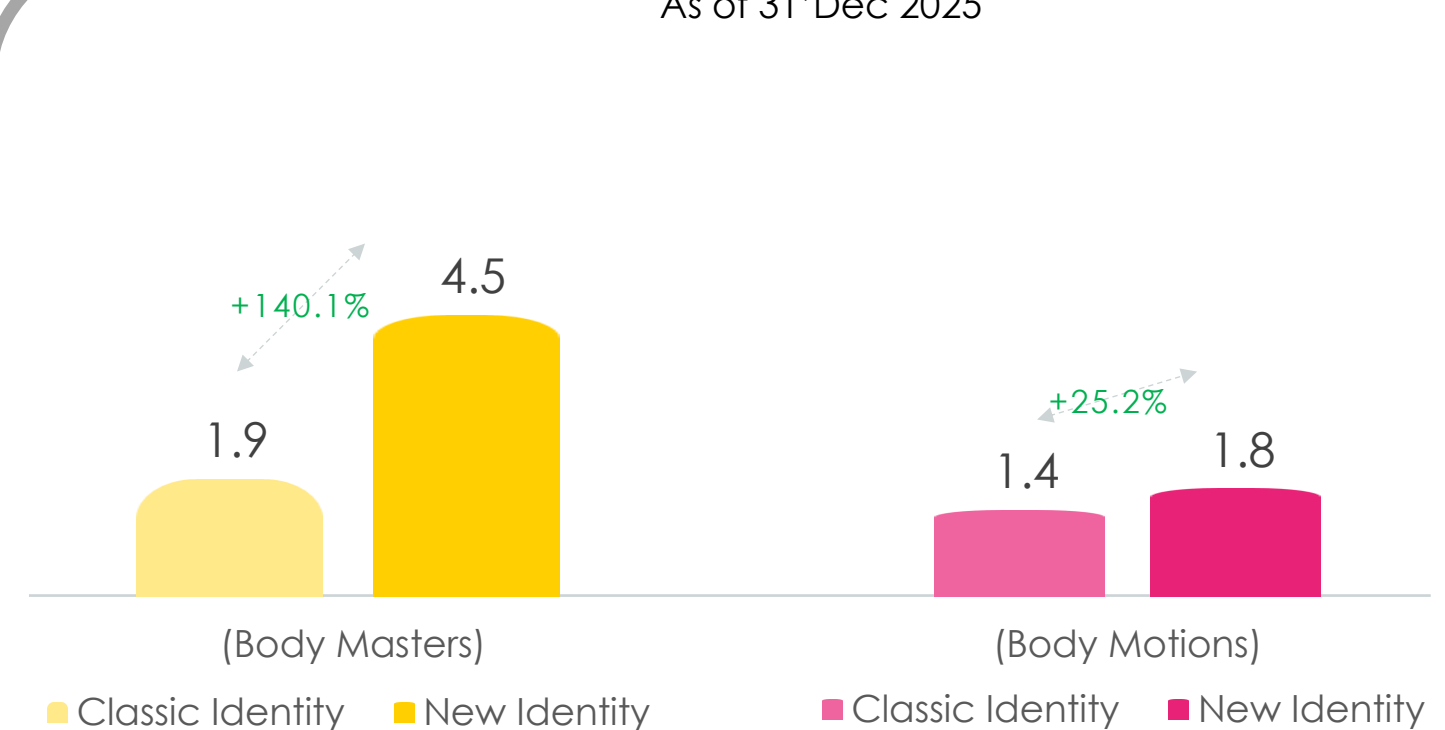


12M'25 Net Income Per Club Performance (Millions)



Actual Active Members Per Club (Thousands)

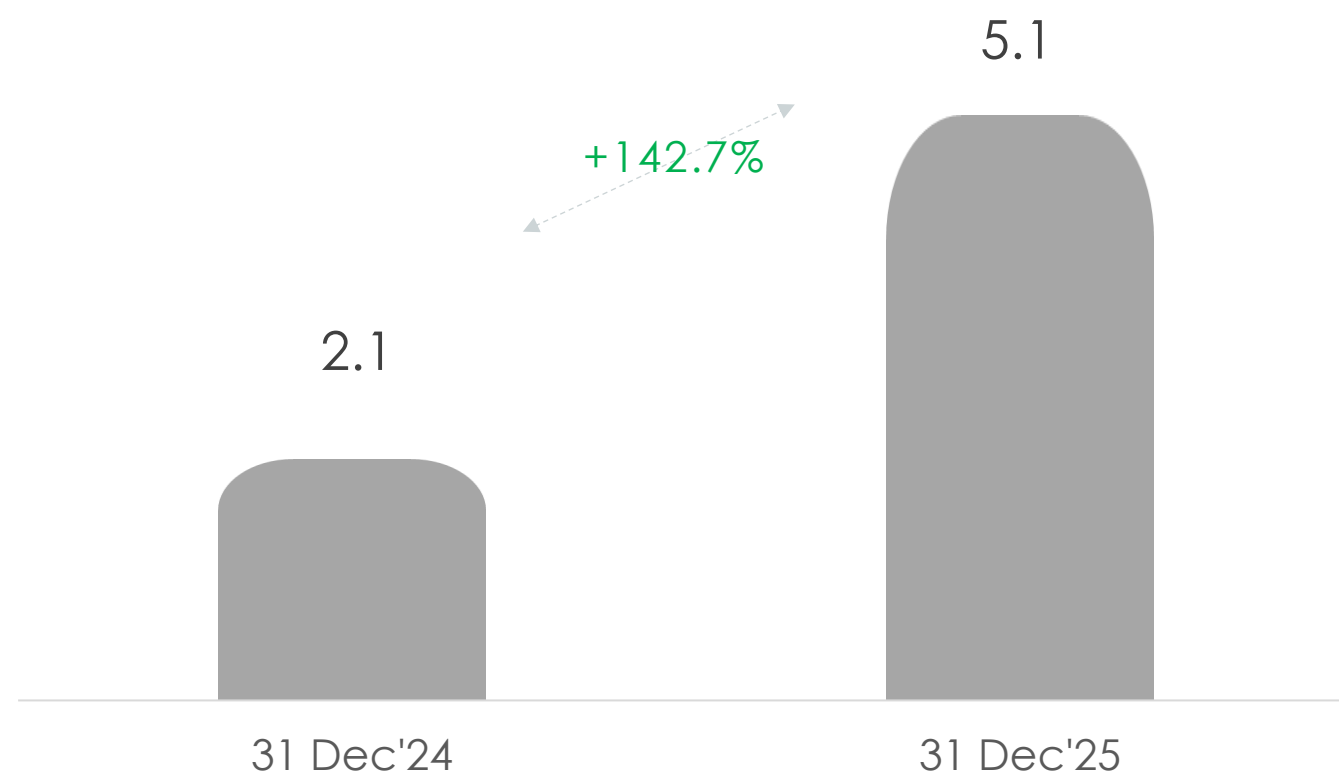
As of 31'Dec 2025



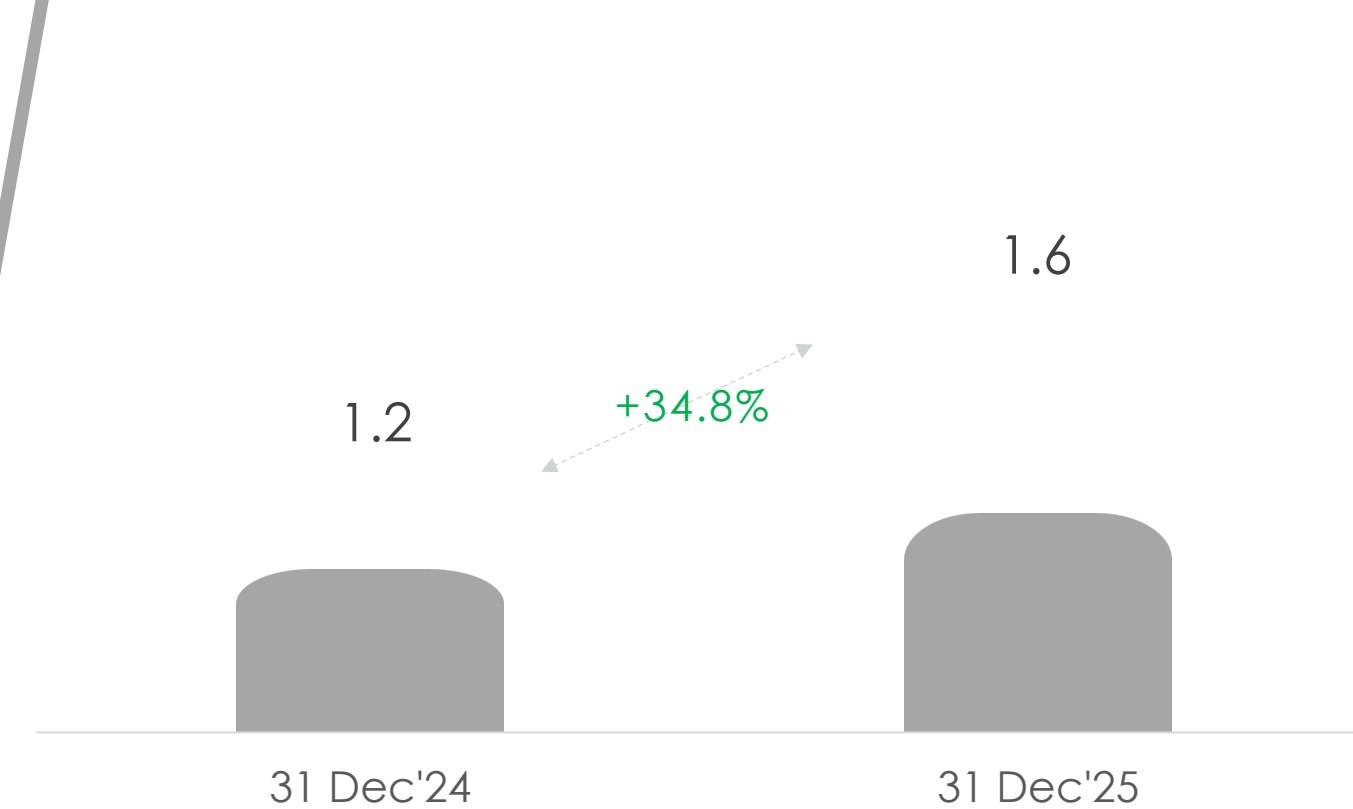
Rebranding Strategy Paying Off!, Strong Performance Across Metrics.

Active Members for Same Clubs at Same Period end Rose Sharply YOY After Refurbishment and Rebranding.

Actual Active Members for Club 1 (Thousands)



Actual Active Members for Club 2 (Thousands)



Guidance



Future Business Guidance

Body Masters		Unit	2025-2026	2027 - 2029
Existing Clubs Revenue	Revenue growth	%	2.0% - 3.0%	
Clubs Closures	Premium (old model)	# of clubs	2	0-2
	Express	# of clubs	2	1-3
Total New Clubs Openings	Premium (new model)	# of clubs	9-11	14-16
Average Revenue Per New Model Club	Including ancillary revenue*	SAR MN	8-9	9-10
Average Ramp-up Per New Model Club		Months	8-10	8-10
Average Gross Margin	Premium (new model)	%	40% - 45%	42% - 47%
Average CAPEX Per New Model Club	Including equipment	SAR MN	15 - 17	15.5 - 17.5
Body Motions		Unit	2025 - 2026	2027 - 2029
Existing Clubs Revenue	Revenue growth		4.0% - 4.5%	
Clubs Closures		# of clubs	-	0-1
Total New Clubs Openings		# of clubs	9-11	14-16
Average Revenue Per Club	Including ancillary revenue*	SAR MN	7-8	8-9
Average Ramp-up Per Club		Months	10-12	10-12
Average Gross Margin		%	35% - 40%	40% - 45%
Average CAPEX Per Club	Including equipment	SAR MN	13 - 15	13.5 - 15.5
Body Experts		Unit	2025 - 2026	2027 - 2029
Existing Projects' Revenue Per Annum		SAR MN	11.5	0-2
Number of New Projects Per Annum		# of projects	1-3	4-6
Revenue Per New Project		SAR MN	2-4	2-4
Average Gross Margin Per new Project		%	25% - 35%	25% - 35%
EBITDA Margin (Company consolidated)		%	43% - 45%	50% - 54%

Note*: Ancillary revenue includes, inter alia, personal training, nutrition services, body composition, merchandise sale, etc.

Thank you



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