

The image features a stylized background composed of several geometric shapes. On the left, there is a blue square containing the word 'rosslyn' in white lowercase letters. To its right is a red circle partially overlapping a purple square. Below the blue square is a dark purple square. To the right of the dark purple square is a blue square containing a light blue triangle pointing towards the bottom-left corner. The right half of the image is a solid dark purple rectangle containing the text 'Interim Results 2025' and the names of the CEO and CFO.

**rosslyn**

# Interim Results 2025

**Paul Watts, CEO**  
**Ed Riddell, CFO**

# Disclaimer

The content of this presentation has not been approved by an authorised person within the meaning of the Financial Services and Markets Act 2000. Reliance on the information contained in this presentation for the purposes of engaging in any investment activity may expose the investor to a significant risk of losing all of the property or assets invested.

This presentation does not constitute an invitation to effect any transaction with Rosslyn Data Technologies plc (“the Company”) or to make use of any services provided by the Company. No reliance may be placed for any purpose whatsoever on the information contained in this presentation or any assumptions made as to its completeness. No representation or warranty, express or implied, is given by the Company or any of its advisers, officers, employees or agents, as to the accuracy, reliability or completeness of the information or opinions contained in this presentation or in any revision of the presentation or of any other written or oral information made or to be made available to any interested party or its advisers and, save in the case of fraud, no responsibility or liability is accepted (and all such liability is hereby excluded for any such information or opinions).

No liability is accepted by the Company or its directors for any such information or opinions (which should not be relied upon) and no responsibility is accepted for any errors, misstatements in or omissions from this presentation or for any loss howsoever arising, directly or indirectly, from any use of this presentation or its contents.

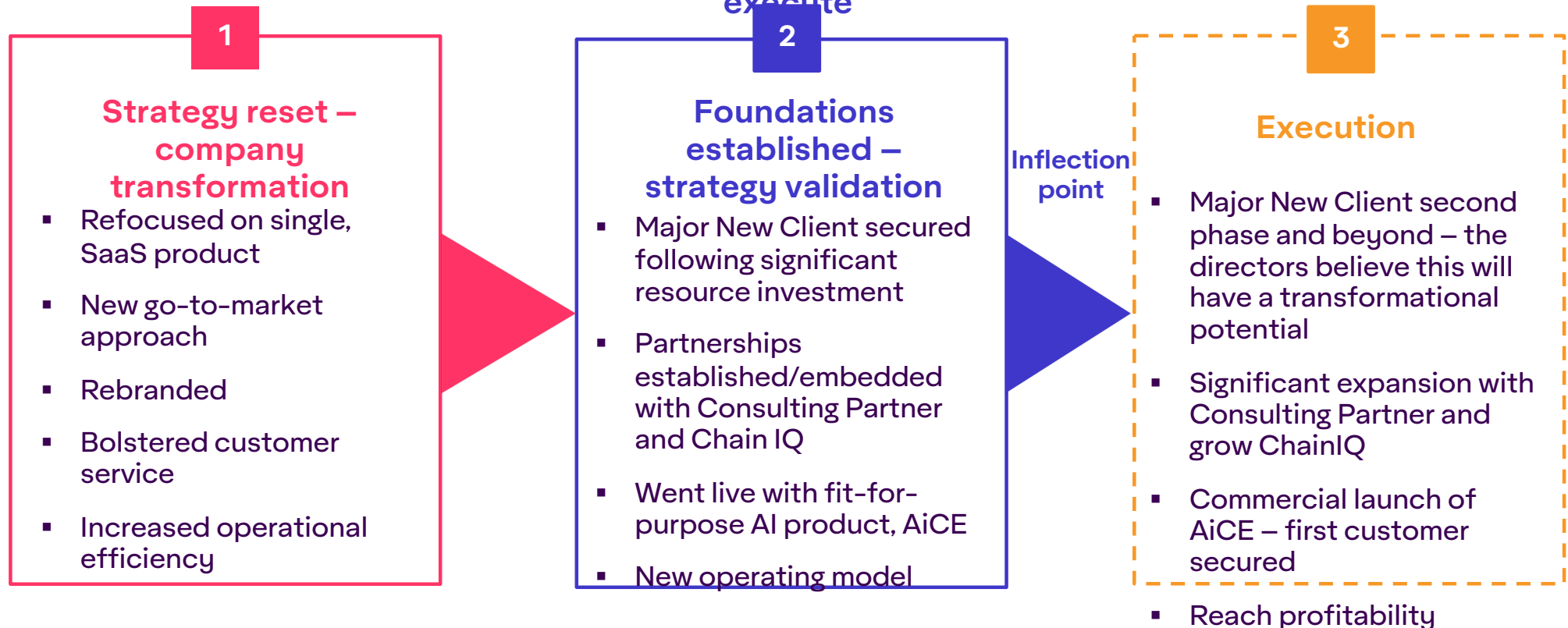
# Highlights

## Milestone period with **strategic** and **financial** execution

- **Delivery on strategy**
  - Secured major new client that is a leading global technology company and household name (“Major New Client”)
  - Selected by a top 5 global consulting firm (“Consulting Partner”)
  - Signed, post period, first commercial customer for AiCE – new AI-powered classification solution
- **Improved financial performance**
  - Strengthened balance sheet following £3.3m fundraise
  - Operational improvements supporting increased gross margin and significantly reduced cash burn

# Strategic delivery

Rosslyn is now at an inflection point – having reset the strategy, had that strategy validated and established the foundations to execute



# Major new direct client win

## Three-year revenue potential with validation of **AI strategy**

- One of the world's 10 largest companies
  - Appointed Rosslyn after a highly complex competitive tender process
  - Major New Client attracted by Rosslyn's agility and development with enterprise procurement data lake and classification automation
  - Co-innovation partnership established:
    - Customer funding next-generation tech build by Rosslyn, including AI elements
- Technology/ E-commerce Company
  - US Headquartered
  - Initial Contract with Central Procurement Division

# New partnership with top 5 global consulting firm

## Significant new channel to market

- Rosslyn selected after a lengthy and competitive tender process to replace internal spend intelligence tool
- Initial three-month internal spend visibility project for US operations – establishing internal skillsets to utilise the Rosslyn platform
- Rosslyn spend cubes to be used in the Consulting Partner’s initial proposals and then recommended as a preferred supplier to customers as part of wider engagement
- 10+ prospective new business opportunities already introduced – with one already secured
- Discussions underway to establish partnerships with other geographies – pipeline already in place for the UK market
- Management believe that this is a validation of partner-led go-to-market approach

### Details of new partner

- One of the five largest consultancies globally
- Part of a professional services network with a presence in 150+ countries
- US-headquartered
- Recognised as a leader in procurement operations consulting

# Product vision & strategy

## Empowering procurement with **AI-enhanced intelligence** and **decision automation** for **strategic excellence**

- Providing cutting-edge AI solutions that empower procurement teams with insights and decision-making capabilities – enabling them to focus on the high value, strategic initiatives
- Blend internal and external data together to form the ultimate supply chain source of truth – enriching procurement teams with data to benchmark against
- **Short-term goal:** unlocking and underwriting data quality – solving the key challenge to leveraging AI for procurement while significantly increasing process efficiency
- **Longer-term goal:** providing predictive intelligence

# Unlocking the power of AI

‘**Quality of Data** remains as the **top spot** for the **barriers to Digitization**’

(SpendMatters, April 2024)

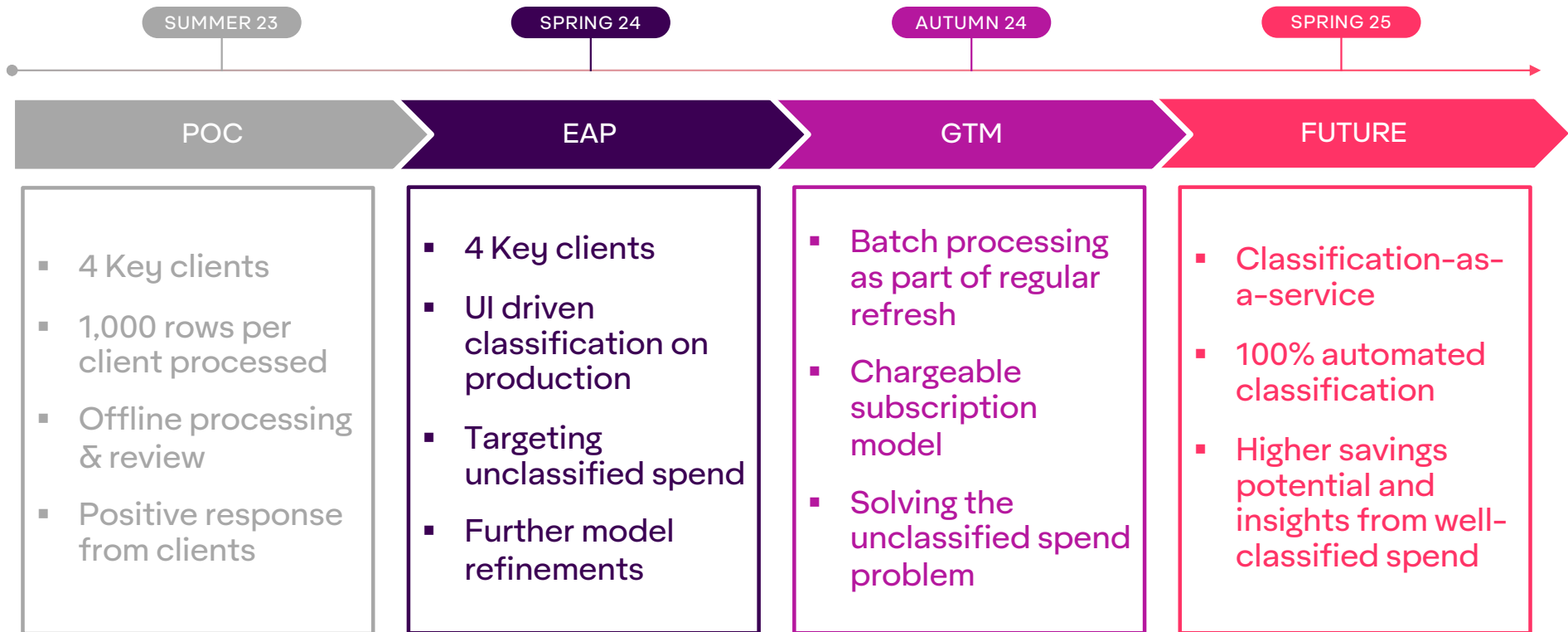
- Rosslyn’s AI classification engine (AiCE) automates the categorisation and classification of extracted procurement data and the Directors believe that this:
  - Significantly increases accuracy
  - Expands volume and complexity of data that can be processed in the same time
  - Shortens time-to-insight
- Developing a procurement data lake to provide greater insight – leading to predictive intelligence
  - Optimal performance requires continuous refining and enriching, which is most effectively achieved through an automated engine, particularly for complex data sets
- Co-developed with key customers – c. £0.5 million investment to reach operational product
- Key factor in securing both the Major New Client and Consulting Partner
- Secured, post period, first commercial customer for AiCE

**Rosslyn is uniquely positioned to solve the AI challenge**

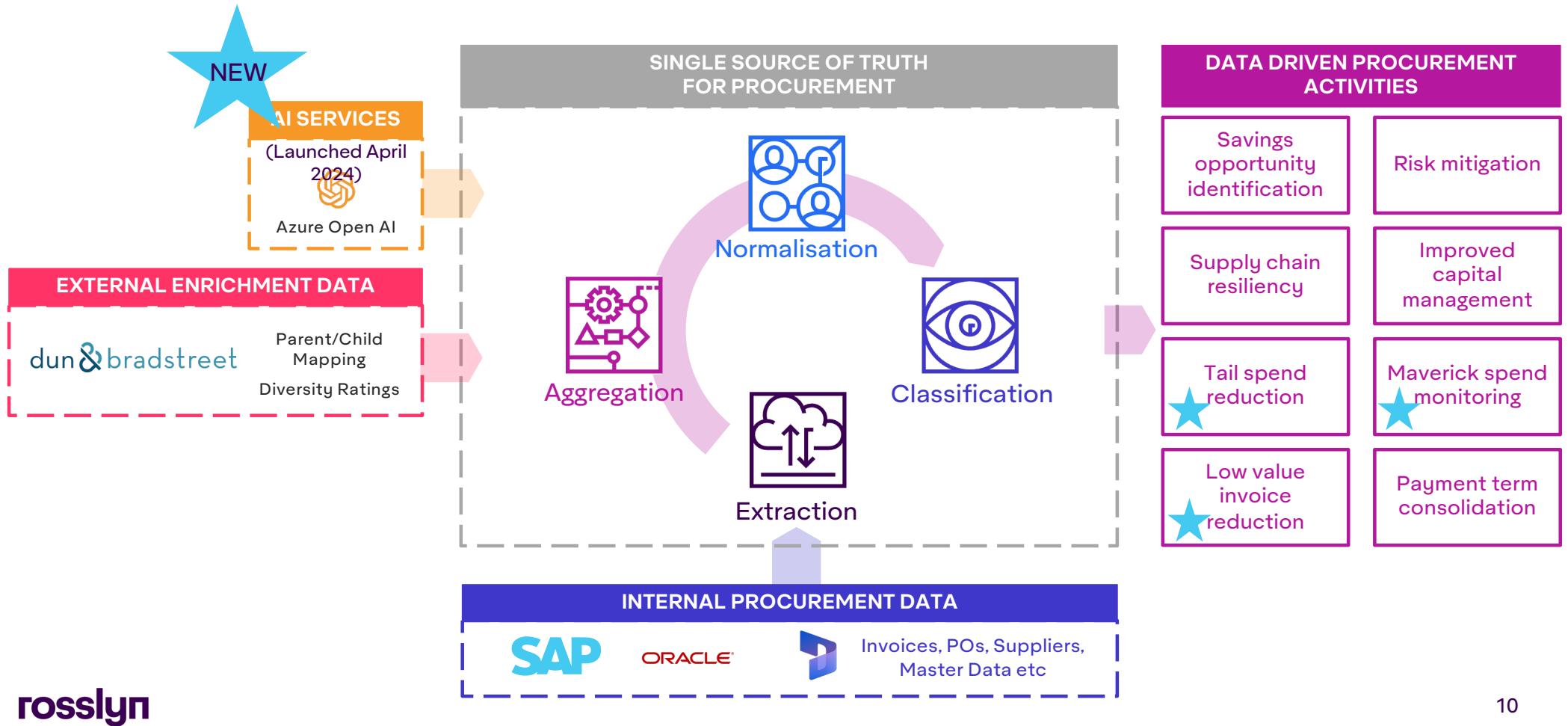
- Extensive experience
- Custodians of vast data sets
- Automation-first approach



# AiCE timeline



# The current Rosslyn platform



# Key performance indicators

	H1 2025	H1 2024
ARR	£2.4m	£2.5m
ARR Growth	(4)%	1%
Total Pipeline	£5.5m	£3.3m
Weighted Pipeline	£1.6m	£1.3m
Gross Margin	40.0%	35.5%
Monthly Cash Burn	£(0.13)m	£(0.28)m
Adj. EBITDA*	£(1.0)m	£(1.5)m

\* Adjustments made for share-based payments and exceptional costs

- ARR reduction reflects strategic decision to prioritise quality of revenues and not renewing certain low-value contracts
- Improvement in all other KPIs

# H1 2025 income statement

	Six months ended 31 October 2024 £'000	Six months ended 31 October 2023 £'000
Revenue	1,491	1,402
Cost of sales	(894)	(904)
Gross profit	597	498
Operating expenses	(1,922)	(2,523)
Operating loss	(1,325)	(2,025)
Net finance costs	(40)	(9)
Loss before income tax	(1,365)	(2,034)
Income tax credit	120	120
<b>Loss for the period</b>	<b>(1,245)</b>	<b>(1,914)</b>
Other comprehensive (loss)/income	(2)	21
Basic and diluted loss per share (pence)	(8.0)	(26.9)

- Margin improvement reflects higher professional services fees
- Operating costs significantly reduced due to lower employee-related and rent costs following prior year's office closure and restructuring activity

# H1 2025 cash flow

	Six months ended 31 October 2024 £'000	Six months ended 31 October 2023 £'000
Net cash used in operating activities	(357)	(1,180)
Net cash used in investing activities	(296)	(264)
Net cash generated from financing activities	2,964	2,853
Net increase in cash and cash equivalents	2,311	1,409
Cash and cash equivalents at beginning of period	646	767
Cash and cash equivalents at end of period	2,955	2,853

- Raised gross proceeds of £3.0m through the issue of new ordinary shares and convertible loan notes

# Financial strategy

## Focusing on sustainable growth

- Step 1: prioritise reaching profitability
- Step 2: accelerate revenue growth – focusing on quality of revenue
- Step 3: achieve the benchmark metric of “rule of 40 company” in FY26

## Path to profitability

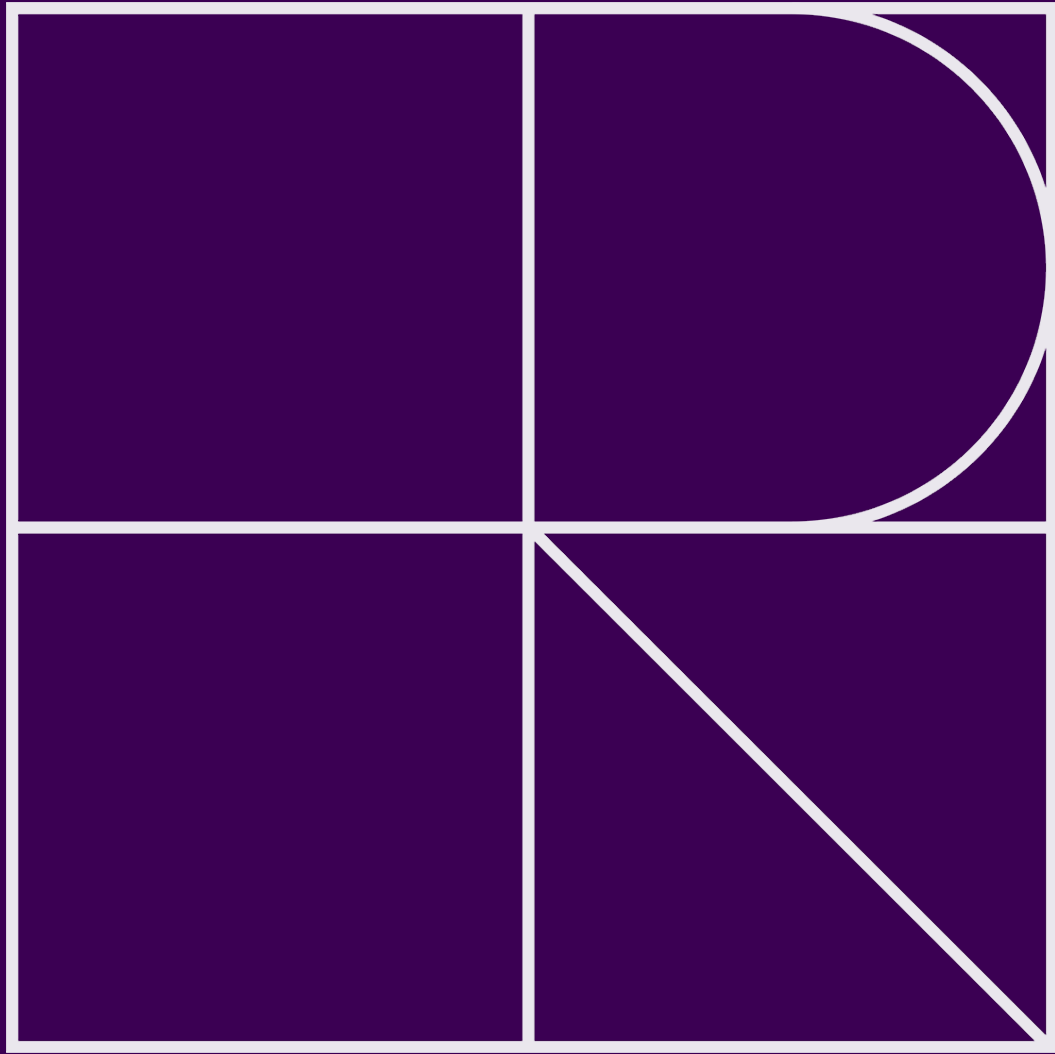
- New technology architecture expected to reduce breakeven point to £3.5m ARR
- New business wins
- New contracts/amendments with existing customers to improve profitability and decrease risk
- Fully utilised professional services team
- Continued tight cost control
- Actions to drive margin improvement

# Summary

- Rosslyn is at an **inflection point** and now poised for **accelerated, profitable growth**
- Significant **strategic endorsement** and **transformational opportunities** with new Major New Client and Consulting Partner
- Commercially launched disruptive **AI-based classification as a service** – potential to significantly **accelerate growth** in the medium-term
- **Strengthened balance sheet** and **expanded pipeline position** Rosslyn for **sustainable growth**
- Major New Client expected to make a **meaningful contribution** to H2 2025 revenue – but sensitive to **timing** of deployment of initial contract, expansion into further departments and further co-development work
- The Board continues to look to the future with **confidence**

rosslyn





# APPENDICES



# H1 2025 balance sheet

	31 October 2024	31 October 2023
	£'000	£'000
Non-current assets	1,684	1,591
Current assets	4,439	3,770
<b>Total assets</b>	<b>6,123</b>	<b>5,361</b>
Non-current liabilities	(1,167)	(713)
Current liabilities	(2,764)	(2,253)
<b>Total liabilities</b>	<b>(3,931)</b>	<b>(2,966)</b>
<b>Net assets</b>	<b>2,192</b>	<b>2,395</b>
<b>Total equity</b>	<b>2,192</b>	<b>2,395</b>

# The requirement for a spend intelligence solution



## ROSSLYN SOLUTION

SaaS platform that incorporates a real-time procurement data lake that blends internal & external data to provide customers with spend intelligence

Savings opportunities

Sustainable supply chains

Financial risk mitigation

Data-driven agility

Improved cash flow

# Our clients & partnerships

Providing spend intelligence for over 17 years to **enterprise customers** with some of the **most complex** organisational and data landscapes

SELECTED CLIENTS

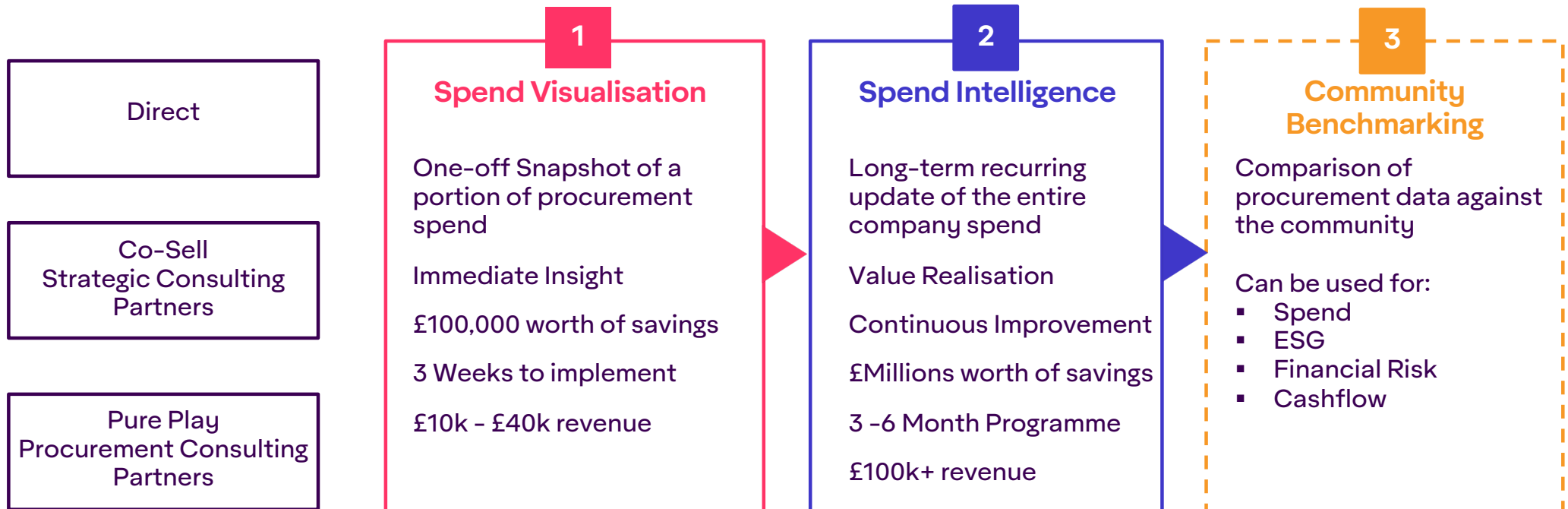


PARTNERS



CORE ATTRIBUTES OF	\$2B+ in Spend	Multiple ERP systems	Complex supply chains	Pharma, Transport, FMCG, Construction, Manufacturing
	Growth via M&A activities	Global supply chains	HQs in the UK, Northern EU or USA	Growing procurement influence

# Rosslyn go-to-market



# The future Rosslyn platform



Extended AI services, including Rosslyn curated data sets for enrichment, classification and benchmarking

**AI SERVICES**

Machine Learning & Data Science Models for Rosslyn curated data

Azure Open AI

**EXTERNAL ENRICHMENT DATA**

dun & bradstreet

ecovadis

RAPIDRATINGS\*

Craft

S&P Global Market Intelligence

CARBONQUOTA

supplier io

Parent/Child Mapping  
Diversity Ratings  
Risk Ratings

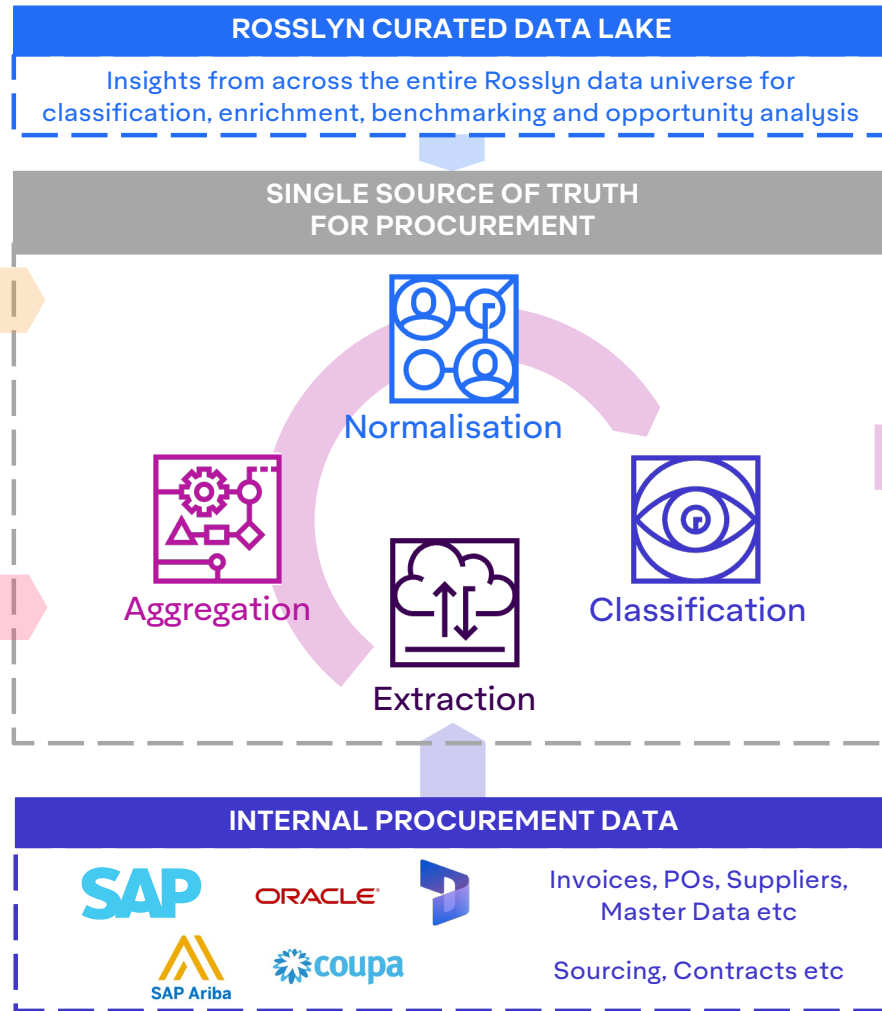


Enhanced 3<sup>rd</sup> party data integrations, providing different lenses across risk, sustainability and market pricing

**rosslyn**



Additional internal sourcing and contracting data from the P2P/S2P systems



Each client achieves their own procurement data lake, whilst Rosslyn's curated data lake combines all insights from across all clients

**AUTOMATED DECISIONS**

- Supplier rationalisation
- Payment term consolidation
- Tail spend reduction
- Maverick spend reduction

**DATA DRIVEN STRATEGY EXCELLENCE**

- Sustainable supply chains
- Risk reduction
- Supply chain resiliency
- Forecasting & planning



Automated tactical decisions free up procurement to ensure data driven strategic excellence