



# Q2

**Interim Report January – June 2026**

LOGISTRI REAL ESTATE AB (publ)





→ Period January– June 2026

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# January – June 2026

- Revenues increased by 24.9% to SEK 106.8 million (85.5)
- Net operating income increased by 24.0% to SEK 98.2 million (79.2) and the surplus ratio was 92.0% (92.7)
- Profit from property management increased by 7.6% to SEK 46.1 million (42.8)
- Profit for the period increased by 8.1% to SEK 75.4 million (69.8), corresponding to SEK 0.78 per share (0.95)
- Profit for the period increased by 8.1% to SEK 75.4 million (69.8), corresponding to SEK 0.78 per share (0.95)
- Changes in the value of financial instruments impacted earnings by SEK -3.6 million (-4.4)

# April – June 2026

- Revenues increased by 21.9% to SEK 54.6 million (44.8)
- Net operating income increased by 19.7% to SEK 49.8 million (41.6) and the surplus ratio amounted to 91.2% (92.7)
- Profit from property management decreased by 4.0% to SEK 21.6 million (22.5)
- Profit for the period decreased by 42.2% to SEK 23.0 million (39.8), corresponding to SEK 0.24 per share (0.54). The decrease in profit was mainly explained by negative unrealized changes in the value of financial instruments of SEK -20.0 million (2.0)
- Changes in the value of investment properties impacted earnings by SEK 30.5 million (32.2)
- Changes in the value of financial instruments impacted earnings by SEK -20.0 million (-4.2). See CEO's comment page 3.

## Significant events during the quarter

Logistri has extended the lease agreement regarding the property H rryda Solsten 1:127 by 10 years. The annual rental value amounts to SEK 13.6 million.

## Significant events after the end of the period

No significant events have occurred after the end of the period.

## The project in Ludvika is more than half completed

The project in Ludvika, to create Hitachi Energy's logistics center, has passed an important milestone and is more than 50 % completed. Logistri is in a strong growth phase where ongoing projects and investments are expected to significantly increase earnings per share. At the same time, work continues towards a listing on Nasdaq Main Market, which constitutes a natural next step in the company's development and strengthens the platform for continued long-term value creation.

|                                              | Jan - Jun | Jan - Jun | Apr - Jun | Apr - Jun | Jul - Jun | Jan - Dec |
|----------------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| Selected Key Figures                         | 2026      | 2025      | 2026      | 2025      | 25/26     | 2025      |
| Revenue, SEK million                         | 106,8     | 85,5      | 54,6      | 44,8      | 205,1     | 183,8     |
| Operating Net, SEK million                   | 98,2      | 79,2      | 49,8      | 41,6      | 187,6     | 168,6     |
| Surplus Ratio, %                             | 92,0      | 92,7      | 91,2      | 92,7      | 91,5      | 91,7      |
| Profit from property management, SEK million | 46,1      | 42,8      | 21,6      | 22,5      | 86,2      | 82,9      |
| Profit for the period, SEK million           | 75,4      | 69,8      | 23,0      | 39,8      | 140,9     | 135,3     |
| Property value, SEK million                  | 3 698     | 2 613     | 3 698     | 2 613     | 3 698     | 2 941     |
| Economic occupancy Rate, %                   | 99,8      | 98,7      | 99,8      | 98,7      | 98,7      | 98,5      |
| Remaining lease period, year                 | 8,4       | 7,0       | 8,4       | 7,0       | 8,4       | 7,4       |
| Property property yield, %                   | 6,8       | 6,4       | 6,6       | 6,4       | 6,6       | 7,5       |
| Interest coverage ratio, times               | 2,3       | 2,6       | 2,1       | 2,5       | 2,2       | 2,3       |
| Net loan-to-value ratio, %                   | 48,4      | 50,6      | 48,4      | 50,6      | 48,4      | 43,3      |
| Key ratios per ordinary share A and B        |           |           |           |           |           |           |
| Profit from property management, SEK         | 0,48      | 0,58      | 0,22      | 0,31      | 0,90      | 1,06      |
| Profit for the period, SEK                   | 0,78      | 0,95      | 0,24      | 0,54      | 1,47      | 1,73      |
| Net asset value, SEK                         | 17,65     | 16,76     | 17,65     | 16,76     | 17,65     | 17,10     |

For definitions, see page 28. For reconciliation of key figures, see page 29.







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# Comments by the CEO

## Long-term relationships create long-term value

The first half of the year has been characterised by stable development in our existing portfolio and continued focus on creating long-term value through close collaboration with our tenants. Rental income increased by 24.9 percent and profit from property management by 7.6 percent compared with the corresponding period last year. At the same time, the economic occupancy rate remains at 99.8 per cent and the surplus ratio is 92 per cent. This is the result of a business model based on mission-critical properties, long-term leases and a high proportion of triple-net agreements, which provides stable and predictable cash flows.

The real estate industry is often characterized by a focus on transactions and short-term changes in value. For Logistri, the starting point is different. Our most important mission is to be a long-term partner to industrial companies whose operations are dependent on well-functioning and appropriate premises. It is when our tenants choose to continue to develop together with us that the real value is created.

This was clearly visible during the quarter when we signed a new ten-year lease agreement for our property in Mölnlycke outside Gothenburg. The tenant has been operating in the property since it was built in 1999 and this is the second time we have extended the lease together. For me, it is a clear confirmation that our strategy is working. When a tenant chooses to extend a business-critical lease long before it expires, not only the cash flow is strengthened, but also the relationship between tenant and property owner. This is exactly the kind of long-term partnership we want to build our business around.

At the same time, the development of our logistics center for Hitachi Energy in Ludvika continues according to plan. More than 50% of the project will be completed by mid-year. The project is one of Sweden's largest logistics construction projects and is an important part of Logistris' continued growth. It also illustrates how we work with value-creating investments by developing fully leased properties with long-term leases, we create future cash flows with high predictability. When the project is completed, the company's earnings capacity is expected to increase from SEK 1.02 to SEK 1.58 per share, corresponding to just over 50 percent.

Profit for the quarter was impacted by negative unrealized changes in the value of our interest rate hedges. These follow developments in the interest rate market and affect the reported earnings, but not the company's cash flow. For us, the underlying earnings capacity and cash flow are the most important measures of the development of the business. We continue to deliver stable results while limiting our financial risk through a well-balanced financing and interest rate hedging strategy.

During the year, work will also continue for the listing on Nasdaq Main Market. The relisting is a natural step in Logistri's development. A listing on a regulated market strengthens our position in the capital market, broadens the investor base and creates better conditions for continued long-term growth. My ambition is for Logistri to continue to develop into one of Sweden's leading real estate companies in light industry, warehousing and logistics.

We are entering the second half of the year with a strong project portfolio, fully leased properties, a long remaining lease period and stable customer relationships. This gives us a solid foundation to continue to create long-term value for both our tenants and our shareholders.



**David Träff**  
Chief Executive Officer

*"Earnings and earnings capacity are developing positively. The project in Ludvika is proceeding according to plan, with more than half of the project completed."*





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# Earning Capacity

## Current earning capacity

Current earnings capacity is based on the property portfolio owned at the end of the period and constitutes a twelve-month illustration of Logistris' earnings capacity at that time.

It is important to note that the earning capacity is not comparable to a forecast for the next twelve months, as it does not include, for example, any assessments regarding the development of rents, future vacancies, acquisitions, development projects or unforeseen costs.

Income is based on the property portfolio and leases entered into at the end of the period. Revenues are based on current rent levels and service surcharges, less any discounts and current vacancies.

The property costs are based on experiential normal annual values and include current property tax.

Administrative costs are calculated based on the current organization and the estimated annual costs at the end of the period.

Net financial items have been based on the Group's interest expenses in accordance with financing and interest rate hedging agreements entered into and the prevailing market interest rate at the end of the period. Net financial items also include the recognition of set-up costs and site leasehold fees in accordance with IFRS16. Financial income is included. One-off costs are excluded.

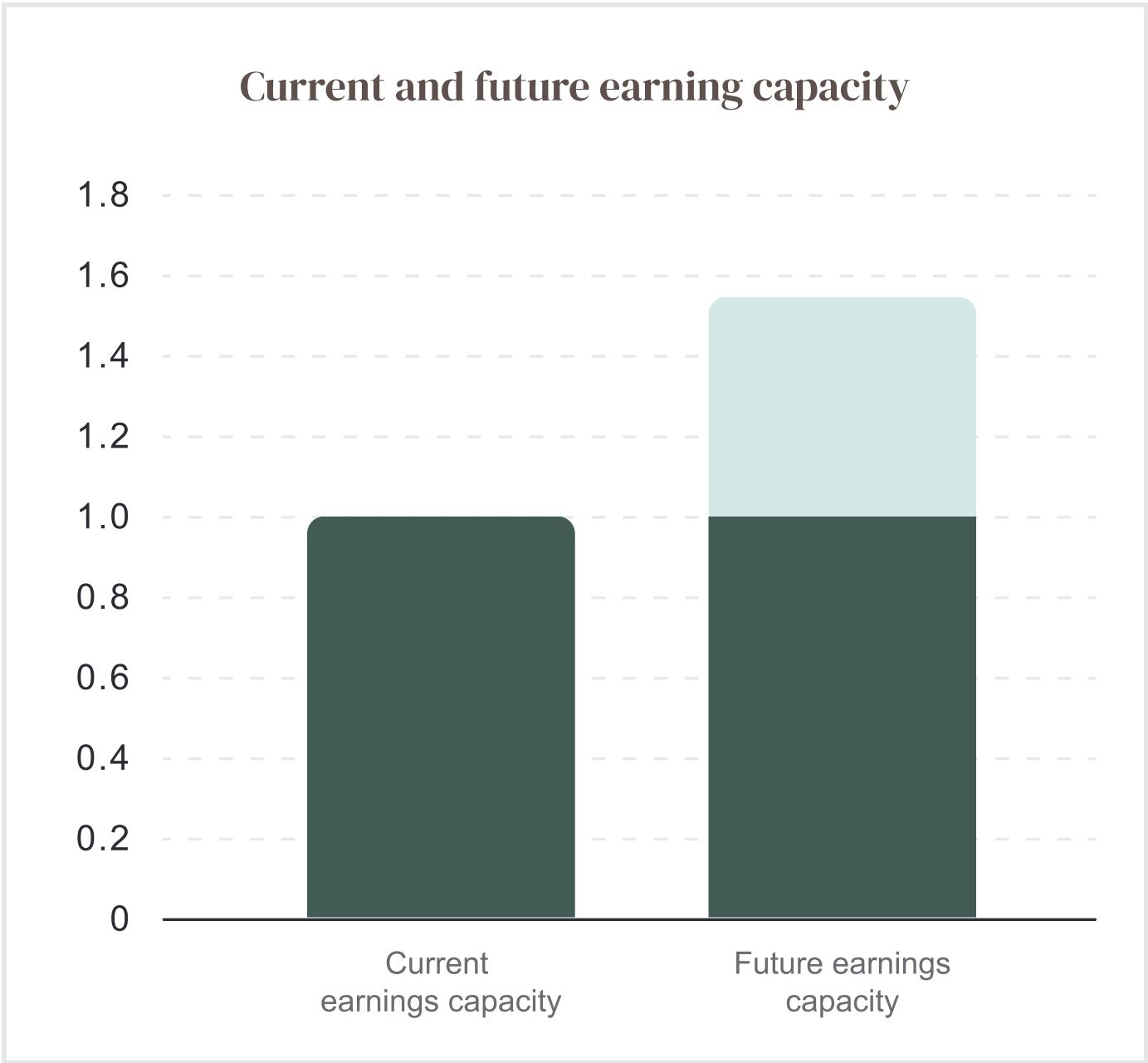
| SEK million                                      | July 1, 2026 | Future earning capacity |
|--------------------------------------------------|--------------|-------------------------|
| Revenue                                          | 217,3        | 312,0                   |
| Property costs                                   | -14,7        | -19,4                   |
| <b>Net operating income</b>                      | <b>202,6</b> | <b>292,6</b>            |
| Administration costs                             | -22,1        | -22,6                   |
| Finance                                          | -82,2        | -108,4                  |
| <b>Profit from property management</b>           | <b>98,2</b>  | <b>161,5</b>            |
| <b>Profit from property management per share</b> | <b>1,02</b>  | <b>1,58</b>             |

## Future earnings capacity

To illustrate the assessed development of Logistris' earning capacity due to major ongoing projects, a future earning capacity is presented. The assessment is made based on current earning capacity combined with the earning capacity from Logistris' ongoing projects in Ludvika.

In future earning capacity, the following assumptions are made. Net operating income is based on the base rent, which has not been indexed with inflation but is based on today's monetary value. Net operating income is reduced by a financing cost that is assumed to correspond to the Group's current average interest rate and a loan-to-value ratio of 51% based on the agreed property value.

No changes to Logistris' organization are adopted. Future earning capacity is recalculated to SEK per share based on the number of shares after payment, of the estimated earn-out price to the seller as of the year-end date, i.e. after expected dilution at the end of settlement of the project.







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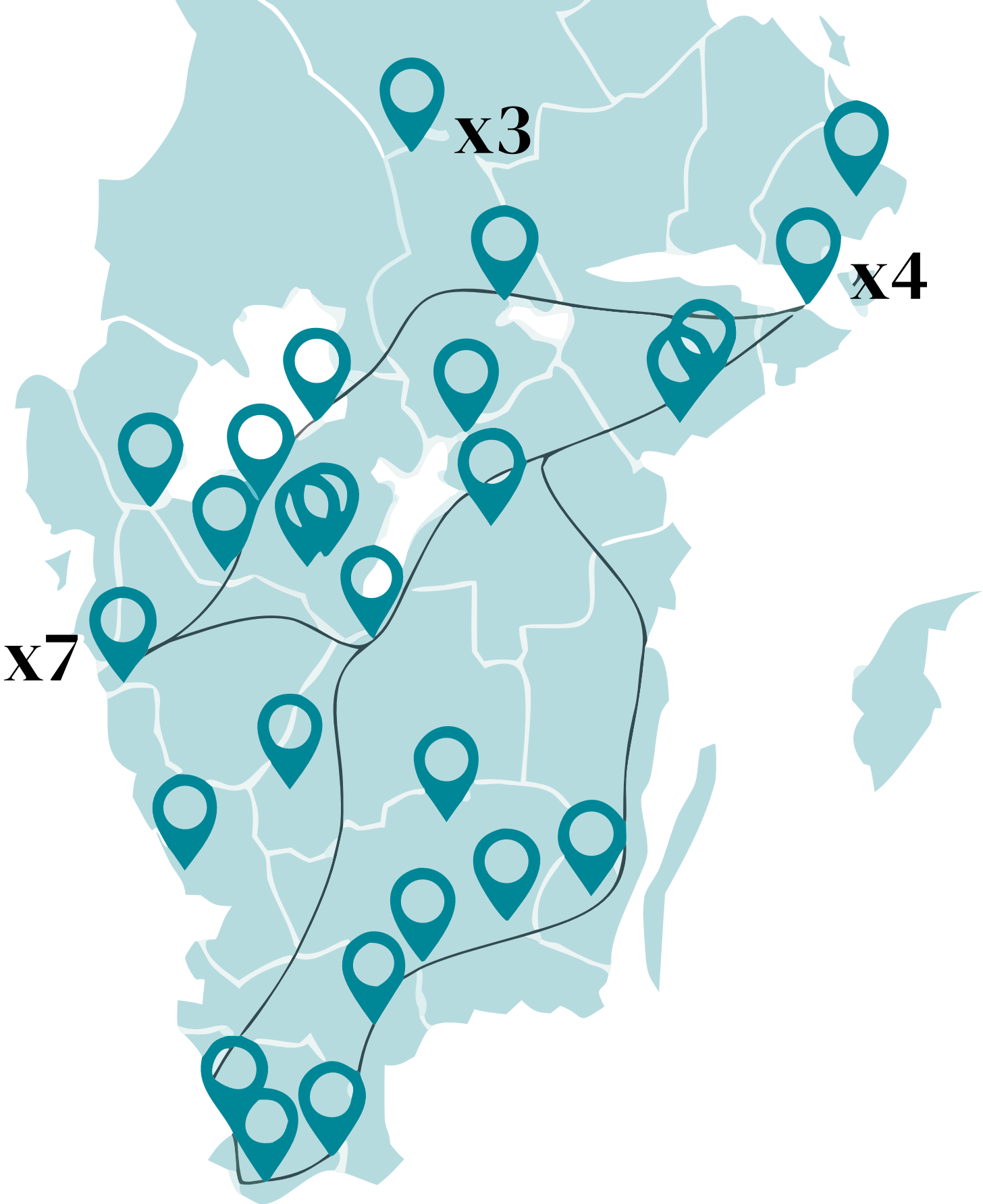
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# Logistri in brief – a cash flow-driven growth case

Logistri is a real estate company that owns and manages business-critical light industry and warehouse properties in Sweden. The company operates in a property segment where tenants are highly dependent on premises with business-critical functions integrated into the properties, often including production, processing, or warehousing. Logistris' combination of long-term leases with terms that limit cost risks creates a long-term perspective and stable cash flows.

Together with our tenants, we develop the properties over time and create the conditions for long-term value creation in the property portfolio. In combination with a clear cash flow-focused acquisition strategy, where the tenant is a central part of the investment analysis, Logistri has shown successful growth.

## Logistri offers a combination of structural growth and stable cash flows

- 1

**Stable cash flows**

Logistri has an economic occupancy rate of 100% and approximately 99% of the rental income comes from triple-net agreements. This creates high predictability and limited cost risk.
- 2

**High profitability**

The company has a surplus ratio of 92% and a strong profit from property management, driven by low property costs and an efficient management model.
- 3

**Growth through acquisitions and projects**

Logistri combines acquisitions with value-creating investments in its existing portfolio. The ongoing project in Ludvika is expected to increase earnings capacity by approximately 53%.
- 4

**Attractive risk profile**

The portfolio is characterized by long-term leases with a remaining contract term of 8.4 years and a diversified tenant mix.
- 5

**Scalable platform**

The company is preparing for a listing on the Nasdaq Main Market in 2026, which is expected to strengthen access to the capital market and contribute to lower cost of capital over time.





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## The road to Nasdaq Main Market

Logistri is in an intensive phase of preparations for a listing on the Nasdaq Main Market. A listing on the main market entails increased requirements for transparency, corporate governance and financial reporting, while at the same time creating conditions for a broader investor base and improved liquidity in the share.

As part of the process, the company is actively working to strengthen internal processes and governance structures, further develop financial reporting and ensure the organization's scalability for continued growth. The ambition is to complete the listing in the second half of 2026. The listing is a natural step in Logistris' development and is expected to strengthen the company's access to capital and contribute to a lower cost of capital over time.

## Financial targets

- Profit from property management per ordinary share shall increase by at least 15% per year on average over a five-year period
- Return on equity shall amount to at least 15% per annum on average over a five-year period
- The net loan-to-value ratio shall not exceed 58% in the long term
- The interest coverage ratio must exceed 2.0 times







→ The Property Portfolio

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# The Property Portfolio

Logistris' property portfolio is focused on light industrial and warehouse premises, which account for 96.7% of the total rental value. The proportion of offices is very limited and is primarily an integrated complement to production and warehouse operations. The company invests in business-critical properties, which means that the premises form a central part of the tenants' operational and strategic operations. This contributes to a structurally low vacancy risk and stable demand over time.

The business model is based on long-term leases, normally with a term exceeding ten years. The leases are inflation-indexed or have a fixed mark-up and consist of 99% of so-called triple-net agreements, where the tenants are responsible for the absolute majority of the operating and maintenance costs. All in all, this creates stable and predictable cash flows as well as high profitability.

The portfolio has continued to expand and at the end of the period comprises 39 investment properties with a lettable area of 269,172 m². In addition to these, two project properties were taken possession of during the period. Upon completion, which is expected in Q2 2027, an additional approximately 103,000 m² of leasable area will be added. The project properties are fully leased to Hitachi Energy Sweden AB with 15-year leases and are not included in the portfolio's reported key figures.

The portfolio continues to show strong profitability with positive growth in net operating income and an economic occupancy rate of 99.8%. The surplus ratio amounts to 92.0% after property costs, which is high from an industry perspective and reflects the efficiency of the business model.

## Tenants

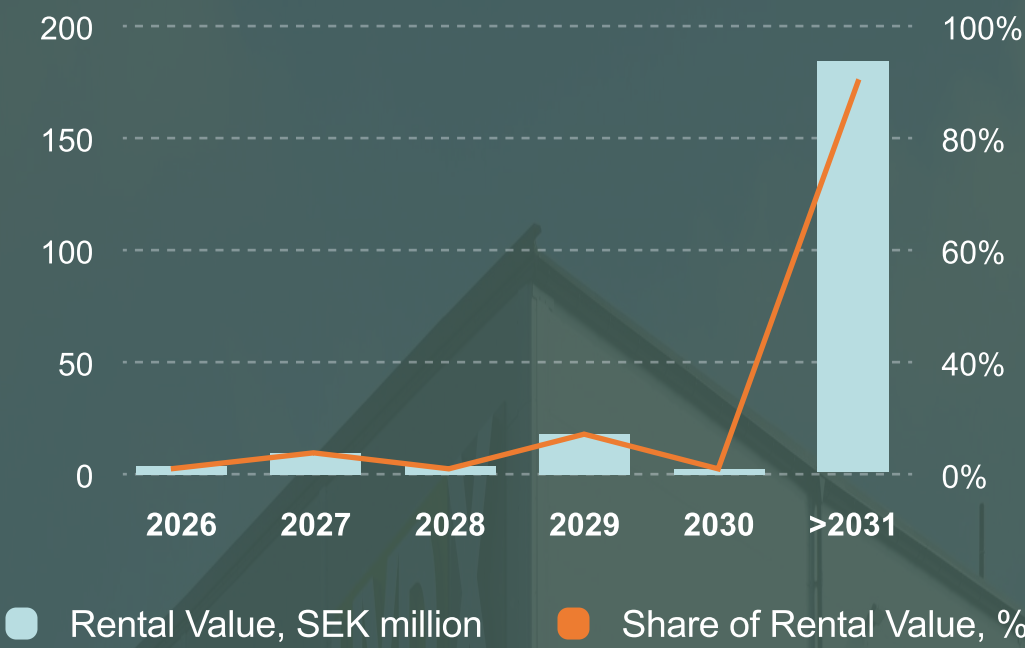
At the end of the period, Logistri had 45 tenants, where no single tenant is larger than 6.6% of the total rental value.

The 10 largest tenants represent 51.8% of Logistri's total rental value. The lease agreements for the 10 largest tenants are 100% triple net agreements with a rent-weighted remaining lease period of 9.0 years.

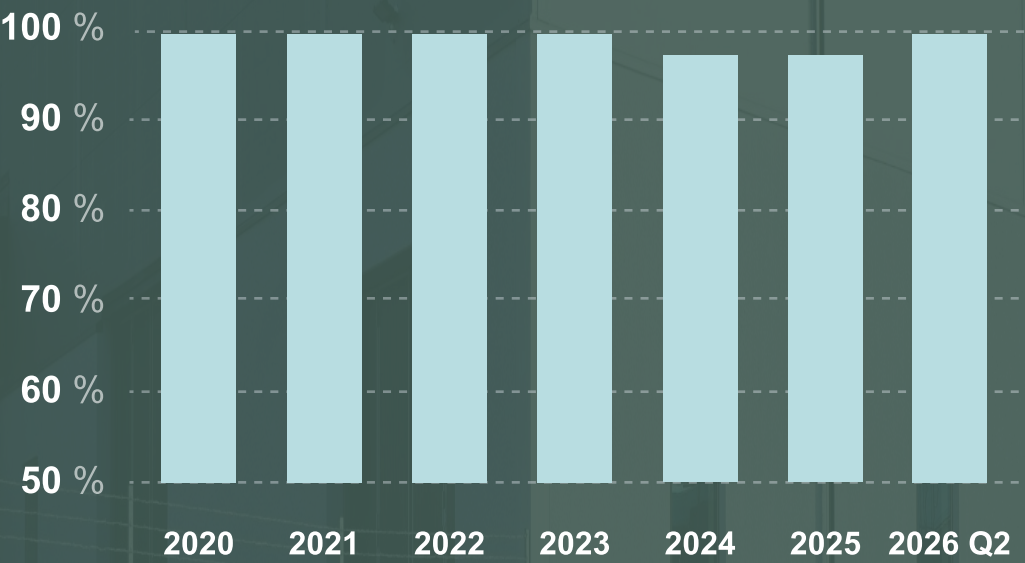
The majority of Logistris' tenants are larger, well-managed industrial companies with a long history in the properties. The tenants represent a number of industries and industry segments. This gives Logistri a well-diversified exposure to different industries and reduces financial risk.

A central part of the company's investment strategy to ensure a stable cash flow is through long-term leases where the tenants bear the majority of the properties' operating and maintenance costs. 99% of the company's total rental income relates to this type of lease, where the company has no or very limited costs for the operation and maintenance of the properties. 87% of Logistris' rental income comes from leases with a lease term that expires in 2031 or later.

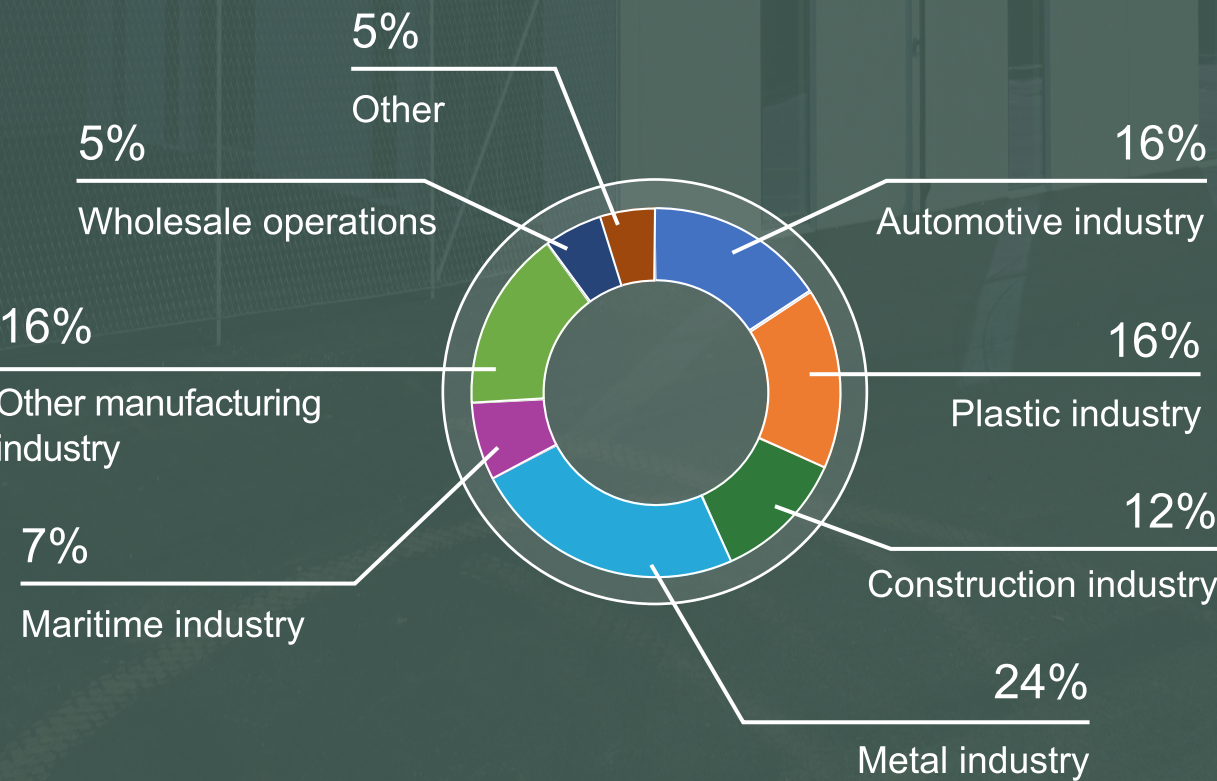
## Maturity Structure Lease



## Historical occupancy rate



## Tenant distribution







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## Geographical Market Areas

Logistri's property portfolio is divided into two complementary market areas: Regional City and Metropolitan City, which together create a well-balanced combination of stable cash flows and value-driven growth.

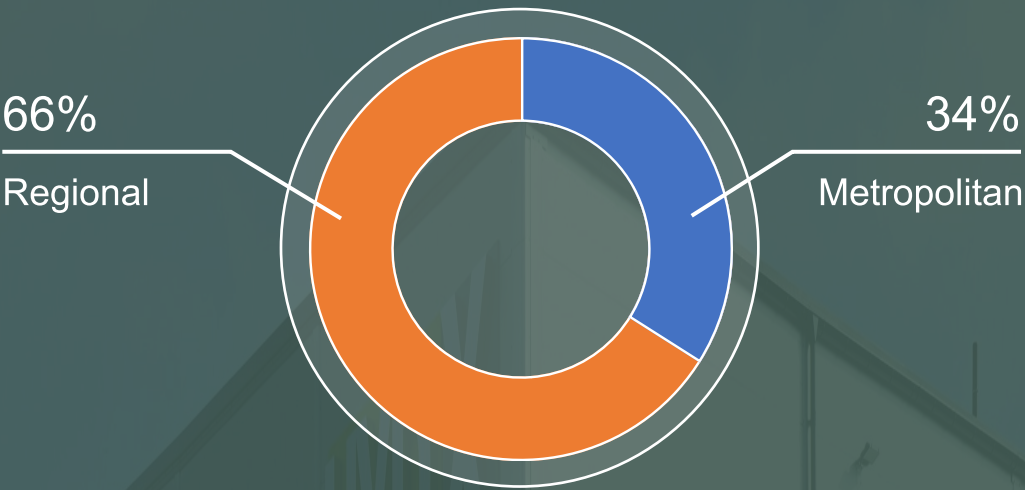
**Metropolitan** comprises 15 properties in light industry and warehouses in established business areas in Stockholm, Gothenburg and Malmö. The market area is characterized by more active management and clear value-creating potential, often in areas undergoing structural transformation. Logistri has a strong track record of developing these assets, with rent increases of approximately 30% in new leases and renegotiations. The economic occupancy rate in Storstad amounts to 100% and a rent-weighted remaining lease period of 7.2 years.

**Regional** comprises 24 properties in regional towns in southern Sweden with a strong industrial tradition. The market area constitutes the portfolio's cash flow base and is characterized by long-term leases, a high proportion of triple-net agreements and very low management costs. The economic occupancy rate is 99.8% and the rent-weighted remaining lease period is 8.9 years, which provides high predictability and stability in earnings.

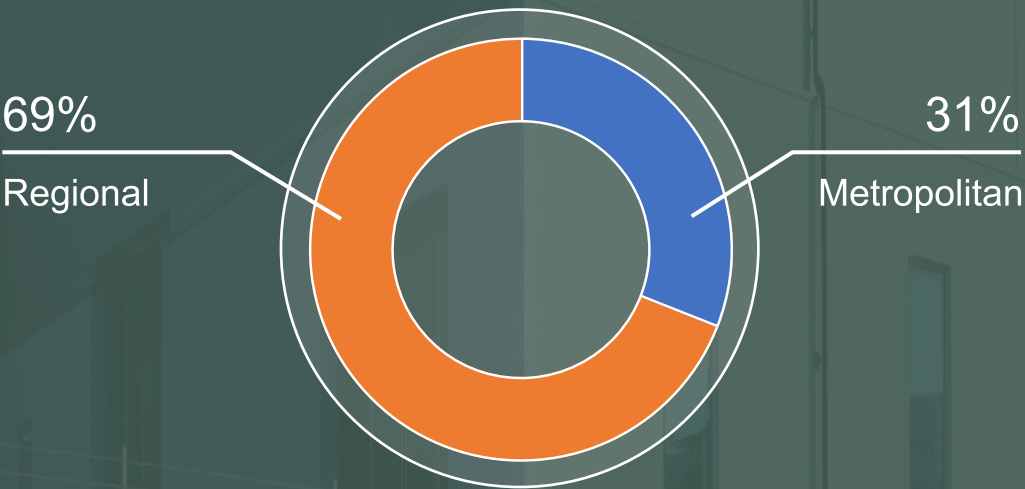
### The property portfolio, excluding project properties

|                              | Total   | Metropolitan | Regional |
|------------------------------|---------|--------------|----------|
| Leasable area, m2            | 269 172 | 53 274       | 215 898  |
| Rental value, SEK million    | 214     | 66           | 148      |
| Rental value, SEK/m2         | 796     | 1 246        | 684      |
| Market value, SEK million    | 3 007   | 1 023        | 1 984    |
| Market value, SEK/m2         | 11 172  | 19 204       | 9 190    |
| Occupancy rate, %            | 99,8    | 100,0        | 99,8     |
| Remaining lease period, year | 8,4     | 7,2          | 8,9      |
| Number of properties         | 39      | 15           | 24       |

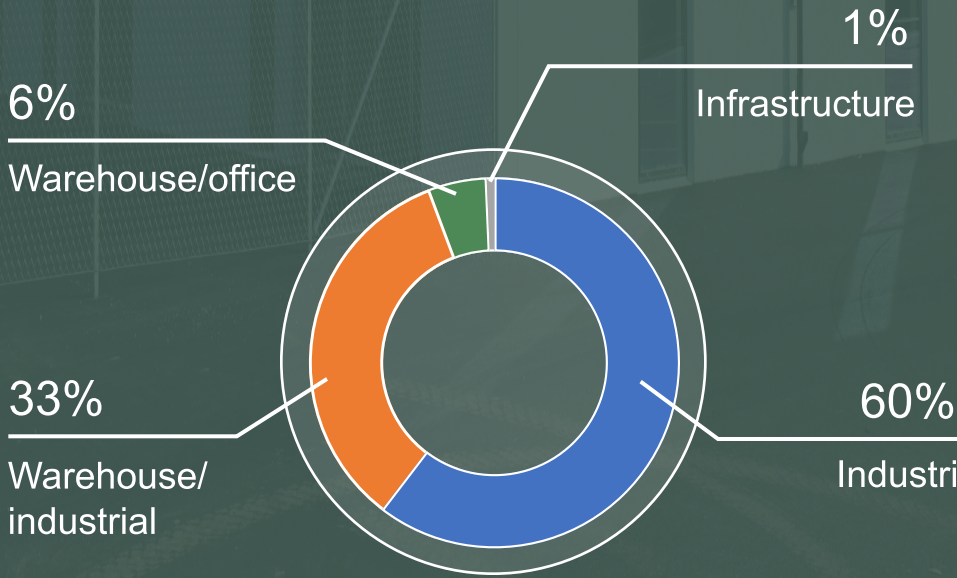
Property value by market area:



Rental value per market area:



Distribution by room type:







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# Market Value of the Property Portfolio

The Group reports its holdings of investment properties at fair value in accordance with IAS 40.

Fair value is based on market valuations and all properties are valued quarterly by an external and independent valuer. The valuation at the closing date of June 30, 2026 is based on market valuation performed by CBRE.

The Group reports the investment properties at fair value in accordance with level 3 of the valuation levels defined in IFRS 13, a valuation model where material inputs are based on unobservable data. The fair value assessments are carried out using a combination of the location price method and a return-based method based on discounting future cash flows for each property, taking into account the applicable lease terms, market conditions, rent levels, operational, maintenance and management costs and the need for investments.

The calculation period is, taking into account the contract term of each property, normally 10-15 years, and during the calculation period, the income consists of agreed rent levels until the end of the contract period. For the period thereafter, the rental income is calculated at the market rent that applies today. Operating and maintenance costs have been assessed based on the company's actual costs, and have been adapted to the condition and age of the properties. For a more detailed description of the Group's valuation principles, see Logistris' Annual Report for 2025.

The weighted yield requirement for the valuation of the property portfolio was 6.5%, where the required rate of return in the valuations, depending on the property category, was in the range of 5.5% to 7.8%. The initial yield requirement in valuations increased to 6.1% on average. During the period, the reported property yield was 6.8%.

The market value of the Group's investment properties at the end of the period amounted to SEK 3,698 million (2 613). The properties taken possession of during the period amount to a value of SEK 370 million. Unrealized changes in value attributable to investment properties amounted to SEK 53 million (54) during the period.

|                                                       | Jan - jun | Jan - jun | Jan - dec |
|-------------------------------------------------------|-----------|-----------|-----------|
| Change in value of the property holdings, SEK million | 2026      | 2025      | 2025      |
| Opening fair value                                    | 2 941     | 2 093     | 2 093     |
| Property acquisitions                                 | 370       | 429       | 664       |
| Divestments                                           | -155      | -3        | -3        |
| Investments in existing properties                    | 1         | -         | 9         |
| New construction                                      | 488       | 40        | 78        |
| Unrealised changes in value                           | 53        | 54        | 100       |
| Closing fair value                                    | 3 698     | 2 613     | 2 941     |

An earn-out consideration for the acquisition of the properties in Ludvika will be paid to the seller Torngrund at the completion of the project. The earn-out consideration is reported as property acquisitions and other short-term debt. The estimated earn-out price per balance sheet date amounts to SEK 107 million.

|                                                         | Jan - jun | Jan - jun | Jan - dec |
|---------------------------------------------------------|-----------|-----------|-----------|
| Changes in the value of properties, profit, SEK million | 2026      | 2025      | 2025      |
| Yield requirement                                       | 7         | -         | 5         |
| Net operating income                                    | 8         | 40        | 60        |
| Miscellaneous*                                          | 38        | 14        | 35        |
| Unrealised changes in value                             | 53        | 54        | 100       |

*\*SEK 19.6 million relates to project Ludvika in 2026*





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| Input data for property valuation | 2026      | 2025      | 2025      |
| Yield requirement, %              | 6,6       | 6,5       | 6,5       |
| Income, SEK/m2                    | 830       | 788       | 693       |
| Operating costs, SEK/m2           | 49        | 48        | 48        |
| Maintenance costs, SEK/m2         | 28        | 24        | 24        |
| Annual inflation, %               | 2,00      | 2,00      | 2,00      |
| Average discount rate, %          | 8,7       | 8,6       | 8,6       |
| Average long-term vacancy, %      | 5,2       | 5,2       | 5,2       |

**Sensitivity analysis of property valuation**

| Valuation parameters   | Adoption | Impact on value, SEK million |                |                |
|------------------------|----------|------------------------------|----------------|----------------|
|                        |          | Jan - jun 2026               | Jan - jun 2025 | Jan - dec 2025 |
| Rental Income          | 10,00 %  | 465 / -465                   | 277 / -277     | 327 / -327     |
| Yield requirement      | 0,25 %   | -72/78                       | -47/51         | -55/60         |
| Long-term vacancy rate | 2,00 %   | -51/51                       | -37/37         | -44/44         |







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# Real Estate Transactions

## Completed transactions

| Property acquisitions        |             |                          |                     |                   |                             |                   |               |               |            |
|------------------------------|-------------|--------------------------|---------------------|-------------------|-----------------------------|-------------------|---------------|---------------|------------|
| Property                     | Tenure form | Tenant                   | Rental period, year | Occupancy rate, % | Property value, SEK million | Leasable area, m2 | Plot area, m2 | Agreement day | Closing    |
| Ludvika Gonäs 1:178 & 1:181* | Ownership   | Hitachi Energy Sweden AB | 15,0                | 100%              | 1 254                       | 103 000           | 155 000       | 2025-10-31    | 2026-01-29 |
| Vänersborg Stallet 18        | Ownership   | Wiretronic AB            | 15,0                | 100%              | 130                         | 5 996             | 15 311        | 2025-03-03    | 2026-03-18 |
| Norrtälje Görla 9:25         | Ownership   | Ahlberg Cameras AB       | 8,0                 | 100%              | 45                          | 2 139             | 5 220         | 2025-03-03    | 2026-03-18 |
| Total                        |             |                          | 9,2                 |                   | 1 429                       | 111 135           | 175 531       |               |            |

*\*ongoing projects, property value corresponds to the agreed property value according to the transfer agreement.*

| Property divestments      |                |            |                     |                   |                             |                   |                   |               |            |
|---------------------------|----------------|------------|---------------------|-------------------|-----------------------------|-------------------|-------------------|---------------|------------|
| Property                  | Tenure form    | Tenant     | Rental period, year | Occupancy rate, % | Property value, SEK million | Leasable area, m2 | Leasable area, m2 | Agreement day | Closing    |
| Botkyrka Apprentice 2     | Ownership      | 2 tenants  | 2,0                 | 51%               | 77                          | 4 175             | 7 032             | 2025-12-18    | 2026-01-30 |
| Stockholm Sillö 6         | Site leasehold | 4 tenants  | 2,6                 | 100%              | 62                          | 3 410             | 4 750             | 2025-12-18    | 2026-01-30 |
| Karlstad Västra Torp 1:93 | Ownership      | Entrack AB | 8,8                 | 100%              | 18                          | 2 090             | 3 900             | 2025-12-18    | 2026-01-26 |
| Total                     |                |            | 3,5                 |                   | 157                         | 9 675             | 15 682            |               |            |





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# Property Development - Ongoing Projects

## Ludvika logistics center – 15-year lease agreement with Hitachi Energy

Logistri and Torngrund are developing a new logistics centre for Hitachi Energy in Ludvika. Upon completion, the property will comprise approximately 103,000 m2 leasable area and is covered by a 15-year lease agreement with the tenant. The project is progressing according to plan with expected completion in Q2 2027. When the project is completed, the company's earnings per share will increase significantly. For further information, see current earning capacity page 4.

Logistri has signed a fixed-price turnkey contract in which the indicative investment amounted to SEK 1,095 million. The amount includes acquisitions of the properties, contract amount, other project-related costs as well as estimated costs for external funding in the form of Building credits. During the first half of the year, the tenant has placed additional orders that will to increase the estimated investment amount by SEK 13 million from the previous SEK 1,095 million to SEK 1,107 million. As compensation for these orders, the parties have agreed on an increased base rent, which entails that the estimated annual net operating income increases to SEK 91 million from the previous SEK 89 million. As of 1 July, the estimated the remaining investment at SEK 544 million, which corresponded to 49% of the estimated total investment amount. The project is fully financed with own funds and building credits.

The transaction with Torngrund is a so-called forward funding, where the project profit, the difference between the final investment and the agreed property value, must be calculated upon completion and is distributed among the parties according to predetermined terms. Torngrund's share of the project profit is paid in the form of an earn-out consideration. Logistri will pay 10% of the earn-out consideration in cash, while the remainder shall be paid with subscription rights, where each subscription right entitles the holder to subscribe for a Class B shares at an estimated value of SEK 16.5 per share.

The tenant has the option of acquiring the project from Logistri upon completion. The agreed The property value of such an acquisition amounts to SEK 1,354 million and will be increased by the cost of additional orders. If the tenant chooses to make use of this opportunity, this must be notified no later than six months before completion. No such notification has been received.

The unrealized change in value from the project for the period amounts to SEK 19.6 million (0).

## Ongoing projects as of 2026-06-30

| Municipality | Fastighet           | Type of project       | Current phase        | Earliest possible end date | Leasable area m² | ndicative investment (SEKm) | Estimated remaining investment (MSEK) | Estimated annual net operating income (SEKm) | Occupancy rate |
|--------------|---------------------|-----------------------|----------------------|----------------------------|------------------|-----------------------------|---------------------------------------|----------------------------------------------|----------------|
| Ludvika      | Gonäs 1:181 & 1:178 | Logistics / Warehouse | Construction ongoing | Q1 2027                    | 103 000          | 1 107                       | 544                                   | 91                                           | 100%           |





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## Drone photage 31 July

Gonäs 1:181 & 1:178



## Ongoing erection of the frame



## Drone photage 31 July 2026







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# Financing

## Capital structure

At the end of the period, the company's capital structure consisted of 40% (38) equity, 48% (52) interest-bearing liabilities and 12% (10) other items. Logistris' creditors consist of four Nordic banks, where the financing consists of secured bank loans. Bond loans are a complementary source of funding.

## Equity

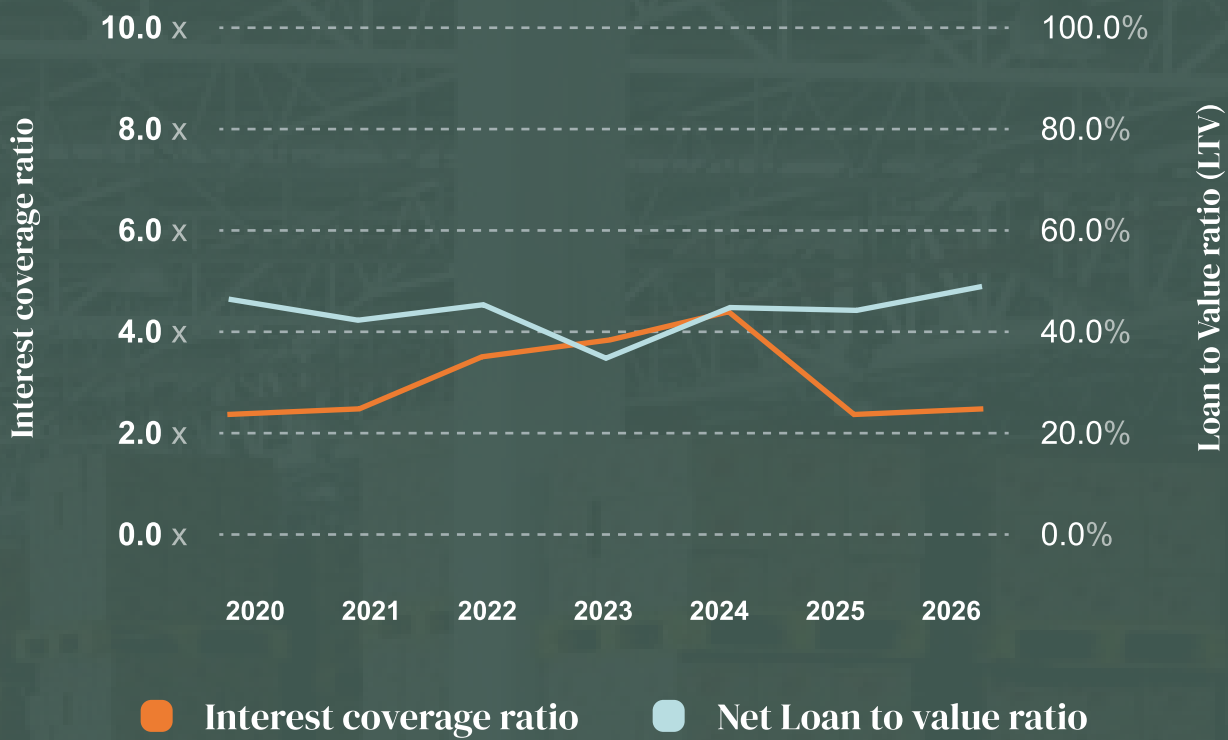
Equity in the Group amounted to SEK 1,542 million (1,496) and increased net by SEK 46 million during the period.The increase was mainly explained by a positive result of SEK 75 million and a reported dividend of SEK 30 million.

## Interest-bearing liabilities

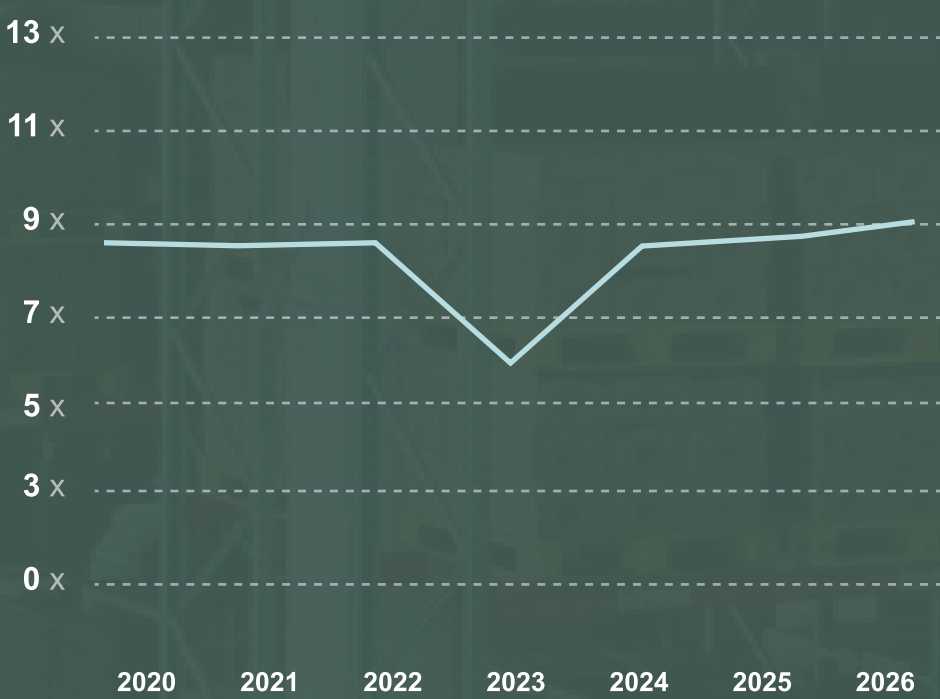
Logistri's interest-bearing liabilities amounted to a nominal value of SEK 1,894 million (1,484) and consisted of bank loans of SEK 1,594 million SEK million (1,180) and bond loans of a nominal value of SEK 300 million (300). Of total interest-bearing liabilities, 84% (80) of bank loans and 16 % (20) of bond loans. The bond is a senior unsecured green bond within a framework of a total of SEK 600 million. The bond is listed on Nasdaq.

|                                                        | Jan - jun | Jan - jun | Apr - jun | Apr - jun | Jul - jun | Jan - dec |
|--------------------------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| KEY FIGURES FINANCING                                  | 2026      | 2025      | 2026      | 2025      | 25/26     | 2025      |
| Equity ratio, %                                        | 39,7      | 38,4      | 39,7      | 38,4      | 39,7      | 44,2      |
| Loan-to-value (LTV) ratio, %                           | 51,2      | 56,8      | 51,2      | 56,8      | 51,2      | 56,7      |
| Return on equity, %                                    | 9,9       | 13,0      | 6,0       | 14,9      | 10,7      | 10,6      |
| Average tied-up capital period, year                   | 2,1       | 1,8       | 2,1       | 1,8       | 2,1       | 2,7       |
| Average fixed interest period, year                    | 2,0       | 1,7       | 2,0       | 1,7       | 2,0       | 2,6       |
| Average loan interest rate at the end of the period, % | 4,0       | 3,9       | 4,0       | 3,9       | 4,0       | 4,3       |
| Interest coverage ratio, times                         | 2,3       | 2,6       | 2,1       | 2,5       | 2,2       | 2,3       |
| Net debt, SEK thousand                                 | 1 791     | 1 323     | 1 791     | 1 323     | 1 791     | 1 272     |
| Net loan-to-value ratio, %                             | 48,4      | 50,6      | 48,4      | 50,6      | 48,4      | 43,3      |
| Debt-to-income ratio, times                            | 9,9       | 8,2       | 9,9       | 8,2       | 9,9       | 7,5       |

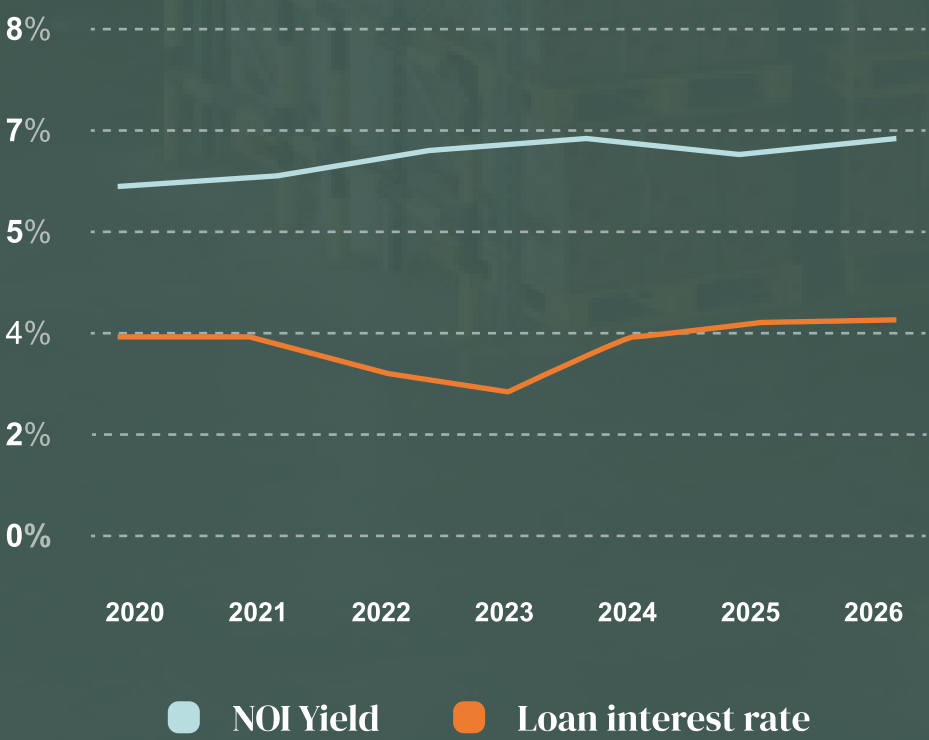
## Net loan-to-value and interest coverage ratio



## Debt ratio



## Dividend yield and loan interest rate







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## Capital and interest rate fixation

For Logistri, the tied-up capital period for interest-bearing liabilities was 2.1 years (1.8). There are no maturities in 2026 apart from ongoing contractual amortizations. The average interest rate at the end of the period was 4.0% (3.9) and the average fixed interest period was 2.0 years (1.7). At the end of the period, Logistri had entered into interest rate hedges of a nominal amount of SEK 1,631 million and relating to interest rate swaps on bank loans and interest rate corridors on the bond. Average remaining maturity of 3.8 years for interest rate swaps and 1.4 years for interest rate corridors.

The balance sheet item current liabilities to credit institutions refers to loans maturing within one year. These loans are linked to a legal entity that is planned to be merged in 2026. In connection with the merger, the loans will be restructured and have a tied-up capital in three years. When calculating the tied-up capital, the company has therefore chosen to classify these loans with a tied-up capital of 2.2 years.

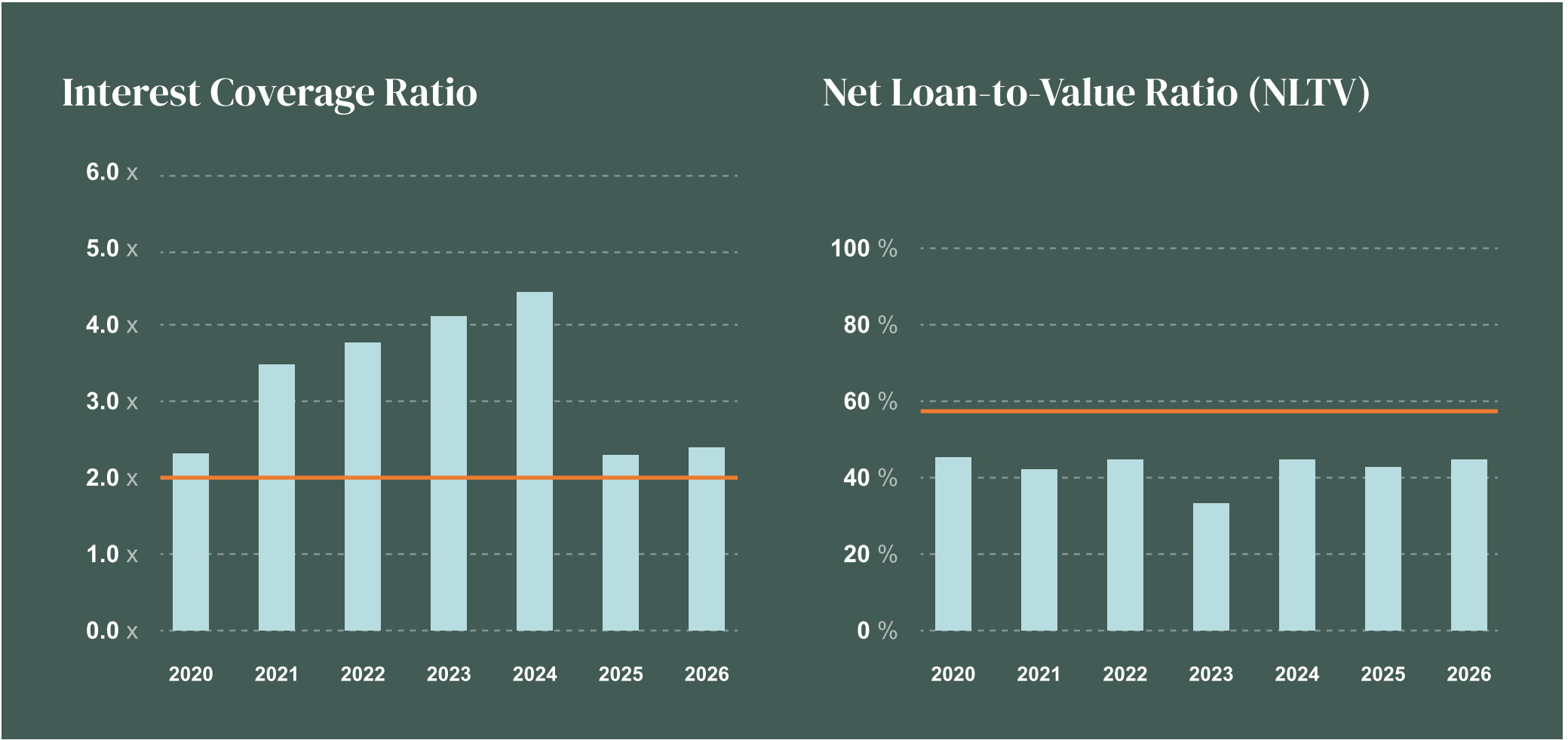
## Market value of financial derivatives

The Group's interest rate derivatives are reported at fair value and the change in value is recognised in the income statement. The carrying amount of the Group's derivatives is based on quarterly valuations from the bank counterparty. To determine the fair value of interest rate derivatives, the difference between the fixed interest rate of the derivative and the prevailing market rate is discounted by the corresponding maturity, which means that fair value is determined according to level 2 of IFRS 13. Other financial instruments are reported at amortised cost, where the carrying amount is considered to be a good approximation of fair value. The Parent Company applies IFRS 9 in a legal entity and financial instruments are reported at current market value.

|                                                           | Jan - jun | Jan - jun | Jan - dec |
|-----------------------------------------------------------|-----------|-----------|-----------|
| Changes in the value of financial derivatives SEK million | 2026      | 2025      | 2025      |
| Opening fair value                                        | 1         | 0         | 0         |
| Unrealised change in value                                | -4        | -4        | 1         |
| Closing fair value                                        | -3        | -4        | 1         |

| Maturity Year  | Tied up in capital      |                    |                                                 |                         | Fixed interest rates                 |                          |
|----------------|-------------------------|--------------------|-------------------------------------------------|-------------------------|--------------------------------------|--------------------------|
|                | Bank loans, SEK million | Bonds, SEK million | Total interest-bearing liabilities, SEK million | Share, %                | Fixed interest rates, SEK million    | Average Interest Rate, % |
| 2026           | 0                       | 0                  | 0                                               | 0%                      | 276                                  | 3,65%                    |
| 2027           | 207                     | 300                | 507                                             | 27%                     | 487                                  | 5,18%                    |
| 2028           | 1 042                   | 0                  | 1 042                                           | 55%                     | 786                                  | 3,58%                    |
| >2029          | 345                     | 0                  | 345                                             | 18%                     | 345                                  | 3,69%                    |
| Sum            | 1 594                   | 300                | 1 894                                           | 100%                    | 1 894                                | 4,02%                    |
| Debt portfolio | Amount, SEK million     | Average margin, %  | Average total interest rate, %                  | Average amortization, % | Average tied-up capital period, year |                          |
| Bank loans     | 1 594                   | 1,53%              | 3,64%                                           | 2,46%                   | 2,27                                 |                          |
| Bond loan      | 300                     | 3,90%              | 6,06%                                           | 0%                      | 1,41                                 |                          |
| Sum            | 1 894                   | 1,91%              | 4,02%                                           | 2,07%                   | 2,13                                 |                          |

\* The difference in total interest-bearing liabilities between the tables above and the Group's balance sheet is explained by accrued set-up fees







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## Available liquidity

Cash and cash equivalents amounted to SEK 103 million (129). Logistri has a revolving credit facility of SEK 100 million (40), which was completely unutilised at the end of the period. The company's available liquidity thus amounted to SEK 203 million (129).

## Financial policy

Logistris' financial policy aims to ensure proactive and continuous work to ensure that the company has access to long-term equity and borrowed capital at the lowest cost based on desired risk levels, underlying assets and market conditions. It also aims to minimise risks associated with financing, which is why the following guidelines have been developed

- The net loan-to-value ratio shall over time amount to a maximum of 58%
- Average weighted tied-up capital shall amount to at least 2 years in the long term
- Bonds shall amount to a maximum of 20% of the total loan volume
- Interest rate hedging should amount to 50-100% in 1-3 years' time and 30-70% in 4-5 years' time
- The interest coverage ratio should exceed 2.0 times in the long term

Deviations from the guidelines can be made for periods in order to take advantage of attractive business opportunities, with the long-term aim of re-fulfilling them.







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# Sustainability Work and ESG

Logistris' business operations shall be conducted in a responsible manner and ESG issues are a central and important part of Logistris' operations and are taken into account in the company's profitability targets. Logistri shall live up to high expectations for sound and ethically sustainable business operations through governance, transparency and knowledge of laws, regulations and good industry standards. Logistri will work to ensure that the company's environmental impact is as limited as practically possible. This also includes the company's tenants and partners, to the extent that the company can influence them.

The property owners' sustainability work is largely about the energy use in the buildings and in the tenants' operations, especially for those real estate companies that do not have extensive project development activities. Solar cells, LED lighting, operational control, heat pumps and EV systems for vehicles are examples of investments that Logistri discusses on an ongoing basis with affected tenants.

Operational optimisation brings benefits for Logistri, its tenants, the environment and leads to long-term improved operating nets. In the long run, it reduces tenants' costs, makes the properties more attractive to new tenants and reduces residual value risk. Over time, the majority of the company's properties will be environmentally certified, and in the case of new construction, buildings will be environmentally certified with at least a level of BREEAM Very Good or equivalent.

## Sustainability work during the period

During the period, the work on practical sustainability work has continued with tenant dialogues about possible investments in various energy projects. The work of environmentally certifying several buildings and agreeing on "green" leases is underway as part of the long-term sustainability planning. Overall, the company shall prioritise the management measures that have a positive effect on the environment and society, while at the same time the measures and investments shall be wise from an administrative financial perspective.



### During the period, the following measures have been implemented:

- A solar cell project has been put into operation on the property Botkyrka Skyttbrink 29
- Certification (BREEAM in Use, Very Good or Excellent) is ongoing for several of the company's properties. In connection with certification, climate risk analyses are also carried out.
- Development of the company's ESG platform in accordance with the CSRD is ongoing.
- In 2026, the company has deployed a support system to be able to measure and analyze media consumption from both property-related and production-related consumption. This means better ESG reporting today and smarter collaboration with tenants tomorrow.
- It is planned to continue in 2026 to carry out energy declarations for those properties that do not have current declarations. In connection with this, energy audits are carried out.

For further information about the company's sustainability work, please refer to the company's annual report.





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# The Share

Logistri's shares are listed on Stockholm on the Spotlight Stock Market and at the end of the period the company had a total of 1,386 shareholders (1,402). The company has two series of ordinary shares in which the A share holds one vote and the B share one tenth of a vote.

At the end of the period, the number of Class A shares was 7,335,000 and the number of Class B shares was 89,348,334. The total number of shares amounted to 96,683,334 and the number of votes to 16,269,833.

In 2025, a share split was carried out where one existing share was divided into ten shares. All key ratios have been adjusted for this share split. In October 2025, an issue of 23,333,334 Class B shares was carried out.

| Share information                     |                        |
|---------------------------------------|------------------------|
| Trading venue                         | Spotlight stock market |
| Ticker A share (ticker)               | LOGIST A               |
| Ticker B share (ticker)               | LOGIST B               |
| Closing price of the B share          | 14,80 kr               |
| Closing price of the B share          | 14,75 kr               |
| Market value at the end of the period | 1 426,4 mkr            |

## Dividend 2026

The Annual General Meeting on 22 April 2026 resolved on a dividend of SEK 0.28 per Class A and Class B share, corresponding to a total of SEK 27.1 million. Payment will be made on four different occasions prior to the next Annual General Meeting, and on each occasion SEK 0.07 per share will be paid and a total of SEK 6.8 million. The record dates are 24 April 2026, 30 June 2026, 30 September 2026 and 30 December 2026. The resolved dividend of SEK 27.1 million corresponds to approximately 37% of the Group's profit from property management, less current tax for the 2025 financial year.

The dividend amount is within the range of 30-50% set by the Board of Directors. Logistri continues to see good opportunities to grow with profitable acquisitions, which has justified the dividend being at the lower end of the range.

## Shareholders

Shareholders as of June 30, 2026:

| Shareholders                   | Number of Class A shares | Number of Class B shares | Total number of shares | Share of shares | Share of votes |
|--------------------------------|--------------------------|--------------------------|------------------------|-----------------|----------------|
| Henrik Viktorsson with company | 1 757 197                | 21 907 014               | 23 664 211             | 24,48%          | 24, 27%        |
| Peter Lindell                  | 806 772                  | 9 310 948                | 10 117 720             | 10,46%          | 10,68%         |
| Mattias Ståhlgren              | 510 000                  | 5 000 000                | 5 510 000              | 5,70%           | 6,21%          |
| Leomar Invest AB               | 1 253 734                | 3 889 952                | 5 143 686              | 5,32%           | 10,10%         |
| Alandsbanken ABP               | 381 552                  | 4 388 252                | 4 769 804              | 4,93%           | 5,04%          |
| Nordnet Pension Insurance      | 65 674                   | 3 912 470                | 3 978 144              | 4,11%           | 2,81%          |
| Avanza Pension                 | 264 541                  | 3 491 961                | 3 756 502              | 3,89%           | 3,77%          |
| Patrik von Hacht               | -                        | 3 251 666                | 3 251 666              | 3,36%           | 2,00%          |
| Trygve Eriksson                | -                        | 2 500 000                | 2 500 000              | 2,59%           | 1,54%          |
| PriorNilsson Funds             | -                        | 2 031 311                | 2 031 311              | 2,10%           | 1,25%          |
| Ten largest in total           | 5 039 470                | 59 683 574               | 64 723 044             | 66,94%          | 67,66%         |
| Others                         | 2 295 530                | 29 664 760               | 31 960 290             | 33,06%          | 32,34%         |
| Total                          | 7 335 000                | 89 348 334               | 96 683 334             | 100,00%         | 100,00%        |

## Long term incentive program

The Annual General Meeting on April 22, 2026 resolved to implement a warrant-based incentive program for employees within Logistri through the issue of subscription rights of series 2026/2030. The warrant program includes an issue of a maximum of 550,000 subscription rights entitling one to subscribe for a maximum of 550,000 shares of series B.

Logistri has a total of 3 decided long-term incentive programs for senior executives and other employees. The subscription price of all subscription rights was below the average market price for the period and has therefore not given rise to a dilution effect for the key figure earnings per share.





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Authorization for the Board of Directors to resolve on share issues

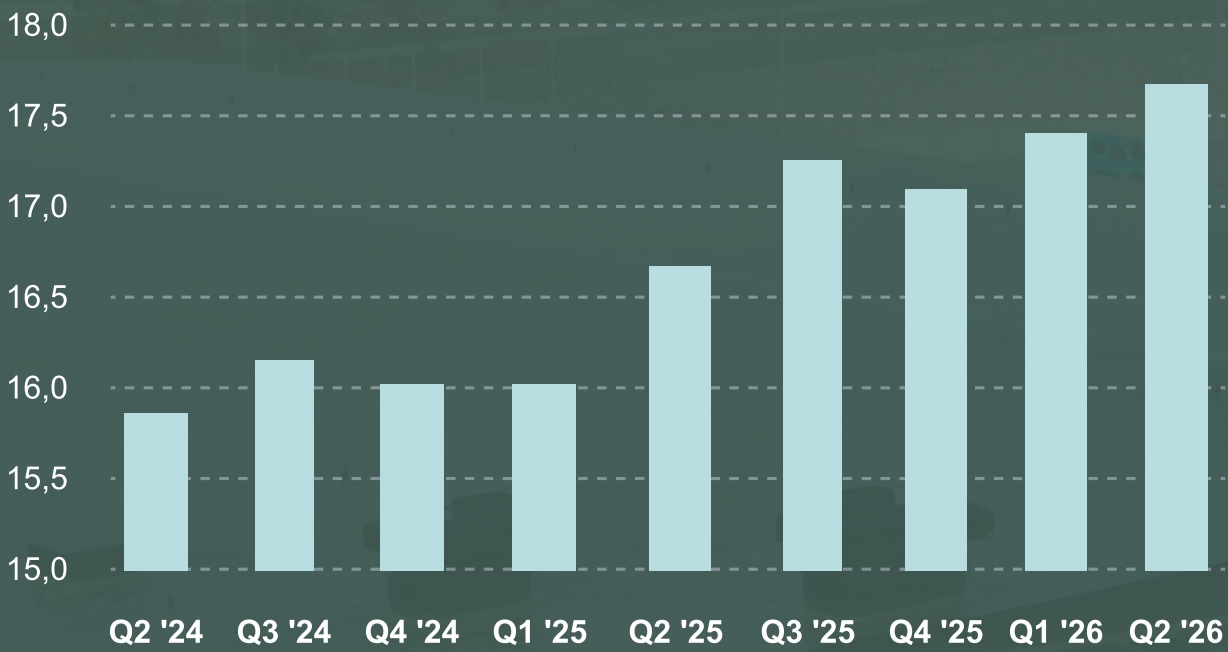
The Annual General Meeting on 22 April 2026 resolved to authorize the Board of Directors, with or without deviation from the shareholders' preferential rights, on one or more occasions until the next Annual General Meeting, to resolve to increase the company's share capital through a new issue of not more than 9,668,333 ordinary shares (A, B and D shares). The AGM also resolved to amend the Articles of Association to allow for the issues and introduce a new ordinary share of Class D.

List change

During the third quarter of 2025, Logstri began preparations for a relisting of the company's shares on Nasdaq Stockholm. The intention is that the relisting can be carried out at the end of the fourth quarter of 2026. The board believes that switching to a larger stock exchange listing will increase interest in the stock, strengthen the company's access to capital, and contribute to a lower cost of capital.

|                                                       | Jan - jun  | Jan - jun  | Apr - jun  | Apr - jun  | Jul - jun  | Jan - dec  |
|-------------------------------------------------------|------------|------------|------------|------------|------------|------------|
| KEY FIGURES FOR THE SHARE                             | 2026       | 2025       | 2026       | 2025       | 25/26      | 2025       |
| Number of shares outstanding at the end of the period | 96 683 334 | 73 350 000 | 96 683 334 | 73 350 000 | 96 683 334 | 96 683 334 |
| Average number of shares                              | 96 683 334 | 73 350 000 | 96 683 334 | 73 350 000 | 96 032 832 | 78 433 288 |
| Profit from property management per share, SEK        | 0,48       | 0,58       | 0,22       | 0,31       | 0,90       | 1,06       |
| Earnings per share for the period, SEK                | 0,78       | 0,95       | 0,24       | 0,54       | 1,47       | 1,73       |
| Equity per share, SEK                                 | 15,95      | 14,84      | 15,95      | 14,84      | 15,95      | 15,47      |
| Net asset value per share, SEK                        | 17,65      | 16,76      | 17,65      | 16,76      | 17,65      | 17,10      |

Net Asset Value per Share, SEK







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# Comments on Results

Period January – June 2026

## Revenue

Revenues increased by 24.9% to SEK 106.8 million (85.5) as a result of annual index increases and the effect of property acquisitions during the period, as well as the full quarterly effect of acquisitions and renegotiations completed in 2025.

## Property costs

Costs in property management increased to SEK 8.6 million (6.3). Property costs consisted of property management and operations of SEK 3.0 million (2.3), repairs and maintenance of SEK 1.8 million (1.3), insurance of SEK 1.2 million (1.1) and property tax costs of SEK 2.6 million (1.6). Costs for operation and maintenance naturally vary over time and cover a smaller part of the property portfolio, in addition to this, the add-on acquisitions have increased the cost base. Over 99% of the company's total rental income relates to triple-net contracts, where the company has no or very limited costs for operation and maintenance.

## Net operating income

Net operating income increased by 24.0% to SEK 98.2 million (79.2). The surplus ratio was 92.0% (92.7). The surplus ratio varies during the year depending on the seasonal variations that exist in the real estate industry. The average property yield during the period was 6.8% (6.4).

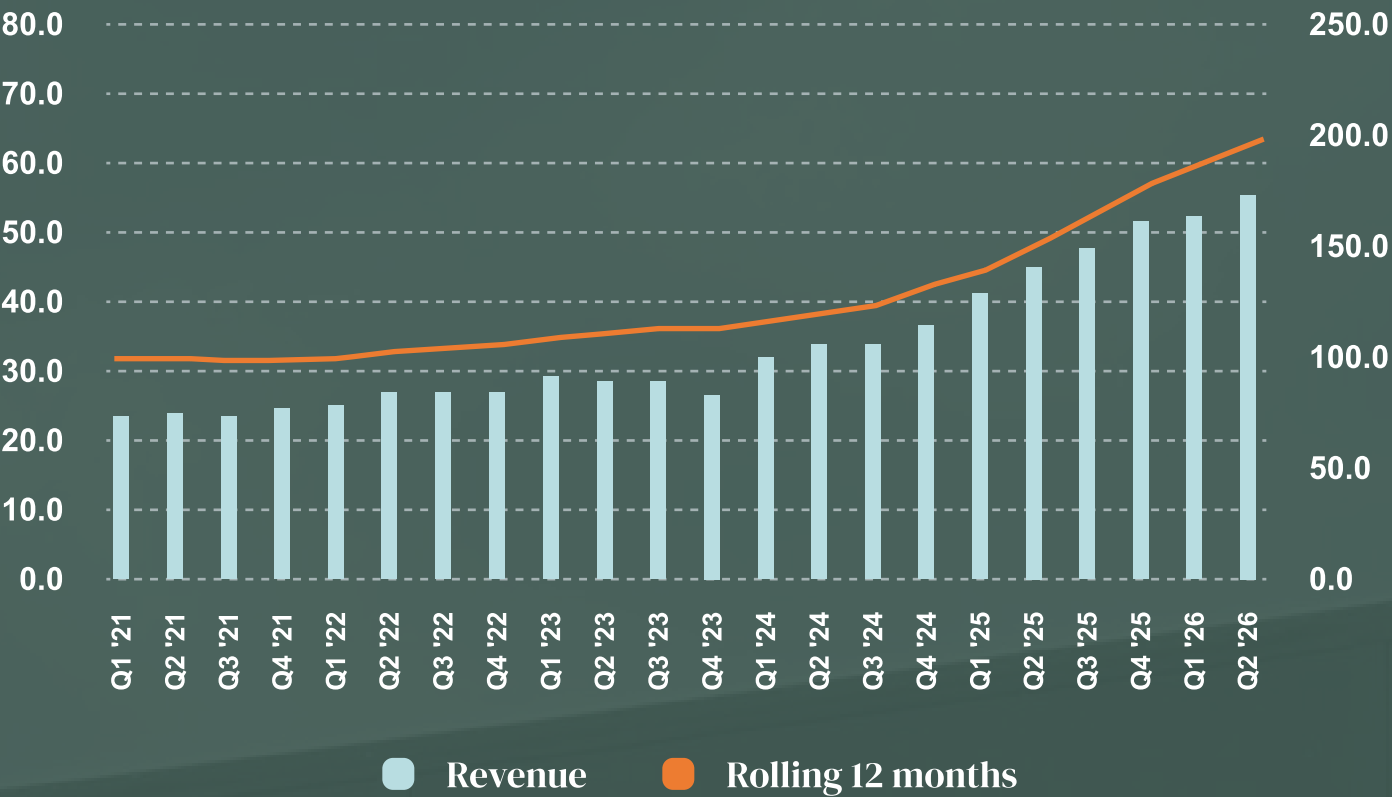
## Administration costs

Administrative expenses increased to SEK 15.3 million (8.8) compared with the same period last year, mainly due to the fact that the company has hired staff and that the property portfolio is growing. Administrative expenses corresponded to 14.4% (10.3%) of the company's revenues at the end of the period, but are expected to represent a reduced share as the portfolio grows and develops. The company has non-recurring costs relating to relisting costs. During the first half of the year, the company expensed SEK 4.4 million relating to relisting costs.

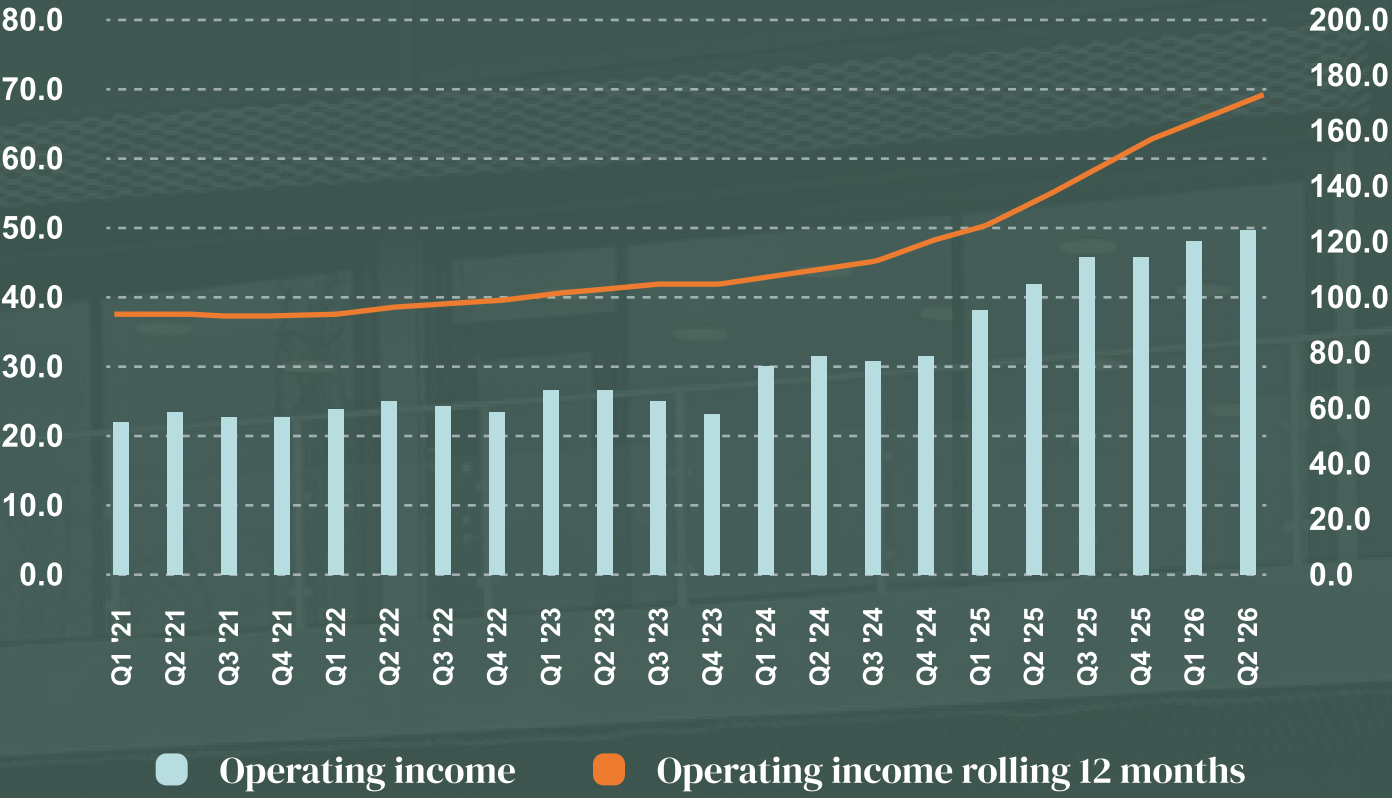
## Finance

Financial income amounted to SEK 1.4 million (1.1) and financial expenses to SEK 38.1 million (28.6), which meant that net financial expenses increased by SEK 9.2 million to SEK 36.8 million (27.5). The increase was mainly explained by higher interest expenses due to borrowings in connection with property acquisitions.

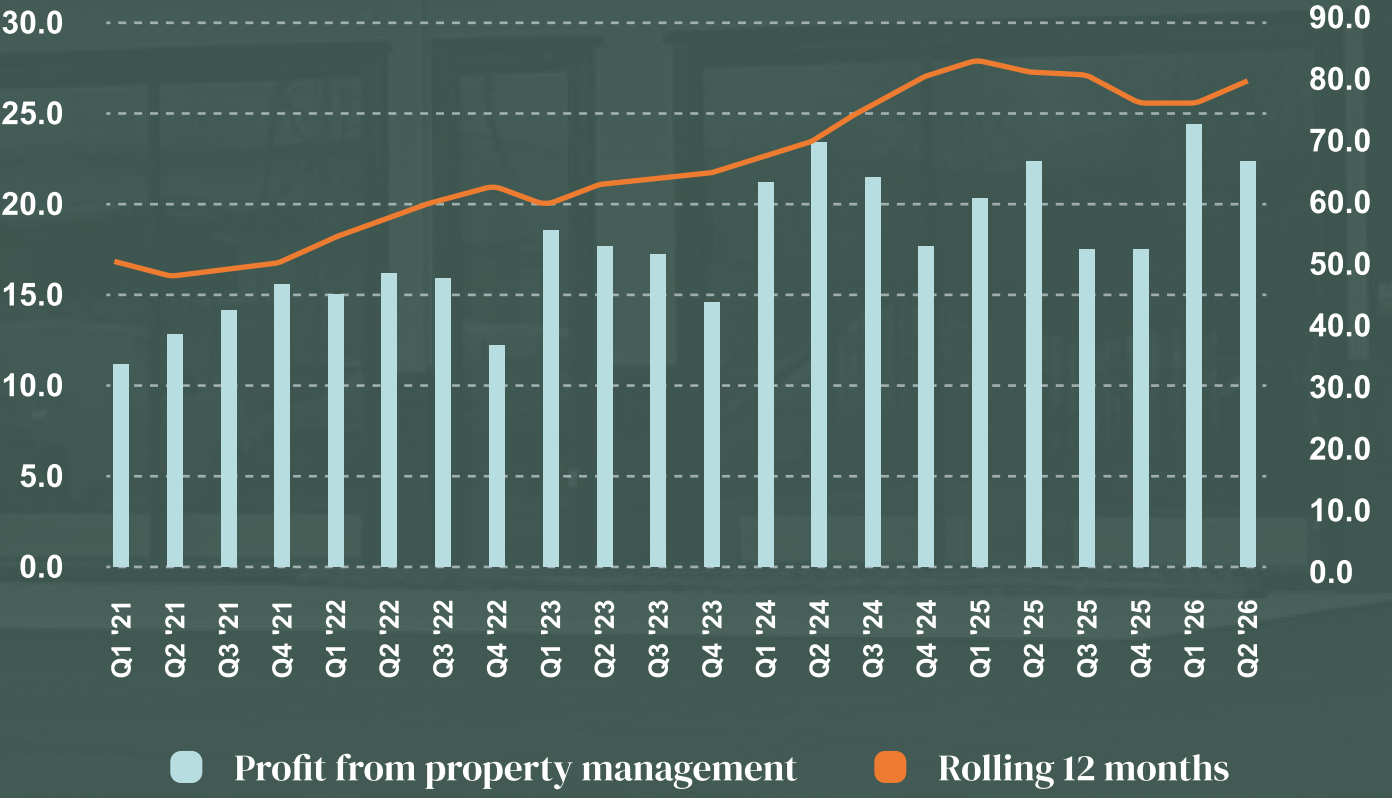
Revenue, MSEK



Operating net, MSEK



Profit from property management







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## Profit from property management

Profit from property management increased by 7.6% to SEK 46.1 million (42.8). The increase was explained by a significantly higher net operating income (SEK 19.0 million) reduced by higher administrative expenses (SEK 6.6 million) and higher financial costs.

## Changes in the value of investment properties

Unrealised changes in value amounted to SEK 52.6 million (54.0), of which SEK 19.6 million (0.0) relates to the ongoing project in Ludvika. The remainder of the positive change in value was explained by property management and acquisition-related activities and changes in the input data for the valuations. Logistris' property portfolio is valued at the end of each quarter by an external independent valuer.

## Changes in the value of financial instruments

Unrealized changes in the value of financial instruments amounted to SEK -3.6 million (-4.4). The change in value is mainly explained by lower market interest rates.

## Tax

Current tax expense amounted to SEK 5.8 million (6.0) and deferred tax expense amounted to SEK 15.4 million (16.7). The cost of deferred tax is mainly attributable to temporary differences between the carrying amount and the tax value of investment properties.

## Cash flow

Cash flow from operating activities amounted to SEK 122.3 million (82.7). Cash flow from investing activities amounted to SEK -620.1 million (-458.5). Acquisitions amounted to -278.0 (-419.2), investments in the newbuilding project amounted to -487.9 (-) attributable to the Ludvika project. The company has also sold properties amounting to SEK 147.4 million (-) during the period. In connection with acquisitions and divestments, the company's cash flow from financing activities affected cash flow of SEK 205.5 million (224.4). During the period, cash and cash equivalents decreased by SEK -292.4 million (-151.3) and cash and cash equivalents at the end of the period amounted to SEK 102.6 million (129.2).

## Profit for the period

Profit after tax for the period amounted to SEK 75.4 million (69.8), corresponding to SEK 0.78 per share before and after dilution (0.95).

## Parent company's performance and position

The parent company's purpose is to indirectly own shares in property-owning subsidiaries. The Parent Company provides Group management functions in terms of corporate management, finance and property management. The parent company's income consists of re-invoiced costs to subsidiaries. The parent company's costs increased compared to the previous year, which is explained by the Group's growth.

Interest income consists of interest received on the parent company's receivables from subsidiaries and deposit interest on cash and cash equivalents. Profit for the period amounted to SEK -3.9 million (-11.4). At the end of the period, the Parent Company's shares in Group companies amounted to SEK 258.4 million (138.6). The Parent Company's long-term and short-term receivables from Group companies amounted to SEK 487.2 million (487.2) and SEK 906.4 million (205.9) respectively. The Parent Company's current liabilities to Group companies amount to SEK 560.9 million (19.3). The Parent Company's equity amounted to SEK 783.9 million (464.6) at the end of the period, corresponding to an equity ratio of 46.8% (54.6).







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# Summary of comprehensive income report

## The Group

|                                                    | Jan - jun | Jan - jun | Apr - jun | Apr - jun | Jul - jun | Jan - dec |
|----------------------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| Amount in thousand SEK                             | 2026      | 2025      | 2026      | 2025      | 25/26     | 2025      |
| Revenue                                            | 106 783   | 85 466    | 54 648    | 44 837    | 205 140   | 183 825   |
| Operation and maintenance costs                    | -6 000    | -4 627    | -3 480    | -2 408    | -12 224   | -10 852   |
| Property tax                                       | -2 588    | -1 641    | -1 331    | -865      | -5 279    | -4 332    |
| Net operating income                               | 98 195    | 79 198    | 49 837    | 41 564    | 187 637   | 168 641   |
| Administration costs                               | -15 334   | -8 777    | -8 588    | -4 325    | -28 410   | -21 854   |
| Financial income                                   | 1 401     | 1091      | 391       | 106       | 3 690     | 3 381     |
| Financial costs                                    | -38 057   | -28 558   | -20 023   | -14 776   | -76 468   | -66 970   |
| Interest on lease debt                             | -127      | -130      | -53       | -65       | -256      | -259      |
| Profit from property management                    | 46 078    | 42 824    | 21 564    | 22 504    | 86 193    | 82 939    |
| Unrealised changes in value, investment properties | 52 624    | 54 020    | 30 467    | 32 186    | 98 161    | 99 557    |
| Realised changes in value, investment properties   | 1 469     | -         | 27        | -         | 1 469     | -         |
| Unrealised changes in value, financial instruments | -3 568    | -4 396    | -20 048   | -4 169    | 1 981     | 1 153     |
| Profit before tax                                  | 96 603    | 92 448    | 32 010    | 50 521    | 187 804   | 183 649   |
| Current tax                                        | -5 810    | -5 979    | -3 815    | -3 300    | -9 029    | -9 198    |
| Deferred tax                                       | -15 376   | -16 667   | -5 169    | -7 384    | -37 836   | -39 137   |
| Profit for the period                              | 75 416    | 69 792    | 23 027    | 39 837    | 140 939   | 135 314   |
| Other comprehensive income                         | -         | -         | -         | -         | -         | -         |
| Total total result                                 | 75 416    | 69 792    | 23 027    | 39 837    | 140 939   | 135 314   |
| Earnings per share* before dilution, SEK           | 0,78      | 0,95      | 0,24      | 0,54      | 1,47      | 1,73      |
| Earnings per share* after dilution, SEK            | 0,78      | 0,95      | 0,24      | 0,54      | 1,47      | 1,73      |
| Average number of shares, thousands                | 96 683    | 73 350    | 96 683    | 73 350    | 96 033    | 78 433    |

\* The key figures for 2025 are adjusted for the share split







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| Amount in thousand SEK               | 30-jun-26 | 30-jun-25 | 31-dec-25 |
|--------------------------------------|-----------|-----------|-----------|
| Assets                               |           |           |           |
| Fixed assets                         |           |           |           |
| Intangible fixed assets              | 193       | -         | -         |
| Investment properties                | 3 697 948 | 2 613 447 | 2 941 458 |
| Machinery and equipment              | 298       | 160       | 337       |
| Right-of-use assets                  | 2 841     | 4 919     | 8 198     |
| Derivative                           | 1 162     | -         | 4 662     |
| Total fixed assets                   | 3 702 443 | 2 618 526 | 2 954 655 |
| Current assets                       |           |           |           |
| Rental receivables                   | 493       | 1 321     | 1 417     |
| Other current receivables            | 45 431    | 64 870    | 6 191     |
| Deferred expenses and accrued income | 32 941    | 21 006    | 25 644    |
| Cash and cash equivalents            | 102 602   | 129 176   | 394 962   |
| Total current assets                 | 181 468   | 216 373   | 428 214   |
| TOTAL ASSETS                         | 3 883 911 | 2 834 899 | 3 382 869 |

| Amount in thousand SEK                      | 30-jun-26 | 30-jun-25 | 31-dec-25 |
|---------------------------------------------|-----------|-----------|-----------|
| Equity and liabilities                      |           |           |           |
| Share capital                               | 9 668     | 7 335     | 9 668     |
| Other capital contributed                   | 995 406   | 655 002   | 994 810   |
| Retained earnings incl. Profit for the year | 536 839   | 426 006   | 491 529   |
| Total equity                                | 1 541 913 | 1 088 343 | 1 496 007 |
| Long-term liabilities                       |           |           |           |
| Liabilities to credit institutions          | 1 489 485 | 1 173 632 | 1 225 465 |
| Bond loans                                  | 294 482   | 292 302   | 293 473   |
| Long-term lease debt                        | 2 143     | 4 919     | 8 198     |
| Derivative                                  | 3 631     | 4 450     | 3 563     |
| Deferred tax liability                      | 161 848   | 136 394   | 158 241   |
| Total long-term liabilities                 | 1 951 590 | 1 611 697 | 1 688 940 |
| Current liabilities                         |           |           |           |
| Trade payables                              | 123 090   | 19 964    | 5 054     |
| Liabilities to credit institutions          | 98 253    | 6 658     | 134 985   |
| Overdraft facility                          | -         | 39 400    | -         |
| Current tax liabilities                     | -         | -         | 2 694     |
| Other current liabilities                   | 130 852   | 41 376    | 13 644    |
| Accrued expenses and deferred income        | 38 212    | 27 461    | 41 545    |
| Total current liabilities                   | 390 408   | 134 859   | 197 922   |
| Total liabilities                           | 2 341 997 | 1 746 556 | 1 886 862 |
| TOTAL EQUITY AND LIABILITIES                | 3 883 911 | 2 834 899 | 3 382 869 |





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# Summary of the change in equity

## The Group

| Amount in thousand SEK             | Share capital | Other capital contributed | Retained earnings line. Profit for the year | Total equity |
|------------------------------------|---------------|---------------------------|---------------------------------------------|--------------|
| Equity 2025-01-01                  | 7 335         | 654 246                   | 394 356                                     | 1 055 937    |
| Dividend                           | -             | -                         | -38 142                                     | -38 142      |
| Warrants                           | -             | 756                       | -                                           | 756          |
| Profit for the period Jan-Jun 2025 | -             | -                         | 69 792                                      | 69 792       |
| Equity 2025-06-30                  | 7 335         | 655 002                   | 426 006                                     | 1 088 343    |
| Nyemission                         | 2 333         | 347 667                   | -                                           | 350 000      |
| Issue costs                        | -             | -9 897                    | -                                           | -9 897       |
| Tax Effect Issue Costs             | -             | 2 039                     | -                                           | 2 039        |
| Profit for the period Jul-Dec 2025 | -             | -                         | 65 522                                      | 65 522       |
| Equity 2025-12-31                  | 9 668         | 994 811                   | 491 528                                     | 1 496 007    |
| Equity 2026-01-01                  | 9 668         | 994 811                   | 491 528                                     | 1 496 007    |
| Dividend                           | -             | -                         | -30 105                                     | -30 105      |
| Warrants                           | -             | 595                       | -                                           | 595          |
| Profit for the period Jan-Jun 2026 | -             | -                         | 75 416                                      | 75 416       |
| Equity 2026-06-30                  | 9 668         | 995 406                   | 536 839                                     | 1 541 913    |

\* *Equity is entirely attributable to the parent company's shareholders*

# Cash flow statement in summary

## The Group

|                                                                       | Jan - jun | Jan - jun | Apr - jun | Apr - jun | Jul - jun | Jan - dec |
|-----------------------------------------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| Amount in thousand SEK                                                | 2026      | 2025      | 2026      | 2025      | 25/26     | 2025      |
| Cash flow from operating activities                                   |           |           |           |           |           |           |
| Profit from property management                                       | 46 078    | 42 824    | 21 564    | 22 504    | 86 192    | 82 939    |
| Non-cash items affecting cash flow                                    | 3 415     | 2 990     | 1738      | 1 490     | 6 835     | 6 410     |
| Taxes paid                                                            | -12 558   | -11 320   | -3 914    | -7 543    | -14 794   | -13 556   |
| Cash flow from operating activities before changes in working capital | 36 934    | 34 494    | 19 388    | 16 451    | 78 235    | 75 793    |
| Cash flow from changes in working capital                             |           |           |           |           |           |           |
| Increase/decrease in rental receivables                               | 924       | 199       | -422      | -96       | 4 589     | 3 864     |
| Increase/decrease in other current receivables                        | -25 046   | 1 281     | 10 506    | 14 743    | 43 837    | 70 164    |
| Increase/decrease in accounts payable                                 | 118 205   | -4 148    | -20 392   | 9 257     | 105 796   | -16 557   |
| Increase/decrease in other current liabilities                        | -8 764    | 50 902    | -4 835    | 45 204    | -25 875   | -5 607    |
| Cash flow from operating activities                                   | 122 253   | 82 728    | 4 245     | 85 559    | 206 582   | 127 657   |
| Investment activities                                                 |           |           |           |           |           |           |
| Acquisition of investment properties                                  | -278 025  | -419 248  | -1775     | -242 188  | -508 999  | -650 222  |
| New construction existing properties                                  | -487 860  | -         | -270 133  | -         | -487 860  | -77 107   |
| Investments in existing properties                                    | -1 449    | -39 108   | -876      | -36 320   | -48 272   | -8 825    |
| Divested investment properties                                        | 147 434   | -         | 27        | -         | 147 434   | -         |
| Acquisition of equipment                                              | -197      | -108      | -197      | -97       | -417      | -328      |
| Cash flow from investing activities                                   | -620 097  | -458 464  | -272 954  | -278 605  | -898 114  | -736 482  |
| Financing activities                                                  |           |           |           |           |           |           |
| Warrants                                                              | 595       | 756       | 595       | 756       | 595       | 756       |
| Issue of shares                                                       |           | -         |           | -         | 350 000   | 350 000   |
| Issue costs                                                           |           | -         |           | -         | -9 897    | -9 897    |
| Dividend                                                              | -19 337   | -19 071   | -6 768    | -9 536    | -38 408   | -38 142   |
| Borrowings                                                            | 372 362   | 268 339   | 297 012   | 268 958   | 1 295 381 | 1 230 758 |
| Amortization                                                          | -145 738  | -23 312   | -36 693   | -22 023   | -923 682  | -801 256  |
| Set-up costs                                                          | -2 397    | -2 271    | -1 497    | -2 271    | -9 029    | -8 903    |
| Cash flow from financing operations                                   | 205 485   | 224 441   | 252 649   | 235 884   | 664 960   | 723 316   |
| Cash flow for the period                                              | -292 359  | -151 295  | -16 060   | 42 838    | -26 573   | 114 491   |
| Cash and cash equivalents at the beginning of the period              | 394 962   | 280 471   | 118 662   | 86 338    | 129 176   | 280 471   |
| Cash and cash equivalents at the end of the period                    | 102 602   | 129 176   | 102 602   | 129 176   | 102 602   | 394 962   |





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# Summary of the income statement

## The Parent Company

|                                                           | Jan - jun | Jan - jun | Apr - jun | Apr - jun | Jan - dec |
|-----------------------------------------------------------|-----------|-----------|-----------|-----------|-----------|
| Amount in thousand SEK                                    | 2026      | 2025      | 2026      | 2025      | 2025      |
| Net sales                                                 | 13 525    | 2 345     | 6 284     | 1 100     | 4 705     |
| Administration costs                                      | -16 610   | -8 432    | -8 564    | -4 262    | -21 157   |
| Operating profit                                          | -3 085    | -6 087    | -2 280    | -3 162    | -16 452   |
| Interest income and similar income items                  | 15 150    | 6 005     | 14 774    | 2 744     | 15 482    |
| Financial costs                                           | -13 645   | -11 361   | -6 611    | -5 652    | -25 219   |
| Profit after financial items                              | -1 580    | -11 444   | 5 883     | -6 070    | -26 189   |
| Changes in the value of financial instruments, unrealised | -2 934    | -         | -16 822   | -         | 1 214     |
| Group contributions                                       | -         | -         | 0         | -         |           |
| Profit before tax                                         | -4 514    | -11 444   | -10 939   | -6 070    | 1 424     |
| Tax for the period                                        | 604       | -         | 3 465     | -         | -2 289    |
| Profit for the period                                     | -3 910    | -11 444   | -7 474    | -6 070    | -865      |

# Balance sheet in summary

## The Parent Company

| Amount in thousand SEK                   | 30-jun-26 | 30-jun-25 | 31-dec-25 |
|------------------------------------------|-----------|-----------|-----------|
| Assets                                   |           |           |           |
| Intangible fixed assets                  | 193       | -         | -         |
| Shares in subsidiaries                   | 258 439   | 138 592   | 258 439   |
| Other fixed assets                       | 213       | 48        | 242       |
| Deferred tax asset                       | 354       | -         | -         |
| Long-term receivables of group companies | 487 205   | 487 205   | 487 205   |
| Derivative                               | 1 162     | -         | 4 662     |
| Total fixed assets                       | 747 566   | 625 845   | 750 548   |
| Current receivables of group companies   | 906 439   | 205 935   | 226 110   |
| Other current receivables                | 1 659     | 95        | 2 525     |
| Deferred expenses and accrued income     | 3 022     | 1516      | 1 074     |
| Cash and bank                            | 16 797    | 17 899    | 208 147   |
| Total current assets                     | 927 917   | 225 445   | 437 856   |
| TOTAL ASSETS                             | 1 675 483 | 851 290   | 1 188 404 |
| EQUITY AND LIABILITIES                   |           |           |           |
| Share capital                            | 9 668     | 7 335     | 9 668     |
| Free equity                              | 774 183   | 457 216   | 807 603   |
| Equity                                   | 783 851   | 464 551   | 817 271   |
| Bond loans                               | 294 482   | 292 302   | 293 473   |
| Derivative                               | 2 882     | -         | 3 448     |
| Deferred tax liability                   | -         | -         | 250       |
| Long-term liabilities                    | 297 364   | 292 302   | 297 171   |
| Trade payables                           | 1 492     | 58        | 880       |
| Current liabilities of group companies   | 560 930   | 19 311    | 53 440    |
| Overdraft facility                       | -         | 39 400    | -         |
| Other current liabilities                | 22742     | 29 097    | 9 896     |
| Accrued expenses and deferred income     | 9 104     | 6 571     | 9 746     |
| Total current liabilities                | 594 268   | 386 739   | 73 692    |
| Total liabilities                        | 891 632   | 310 423   | 371 133   |
| TOTAL EQUITY AND LIABILITIES             | 1 675 483 | 851 290   | 1 188 404 |





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|----------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| REAL ESTATE                            | 2026      | 2025      | 2026      | 2025      | 25/26     | 2025      |
| Number of properties, pcs              | 41        | 34        | 41        | 34        | 41        | 40        |
| Leasable area, sqm                     | 269 172   | 232 087   | 269 172   | 232 087   | 269 172   | 264 257   |
| Fair value of properties, SEK thousand | 3 697 948 | 2 613 447 | 3 697 948 | 2 613 447 | 3 697 948 | 2 941 458 |
| Fair value of properties, SEK/ sqm     | 13 738    | 11 261    | 13 738    | 11 261    | 13 738    | 11 131    |
| Rental value, SEK thousand             | 214 227   | 189 637,0 | 214 227,0 | 189 637,0 | 214 227,0 | 200 765,0 |
| Rental value, SEK/ sqm                 | 795,5     | 817,1     | 795,9     | 817,1     | 795,9     | 759,7     |
| Remaining lease period, year           | 8,4       | 7,0       | 8,4       | 7,0       | 8,4       | 7,4       |
| Economic occupancy rate, %             | 99,8      | 98,7      | 99,8      | 98,7      | 98,7      | 98,5      |
| Occupancy rate, %                      | 99,8      | 99,2      | 99,8      | 99,2      | 99,8      | 99,1      |
| NOI yield                              | 6,8       | 6,4       | 6,6       | 6,4       | 6,6       | 7,5       |
| Surplus rate, %                        | 92,0      | 92,7      | 91,7      | 92,7      | 91,5      | 91,7      |

|                                                       | Jan - jun  | Jan - jun  | Apr - jun  | Apr - jun  | Jan - jun  | Jan - dec  |
|-------------------------------------------------------|------------|------------|------------|------------|------------|------------|
| SHARE-RELATED                                         | 2026       | 2025       | 2026       | 2025       | 25/26      | 2025       |
| Number of shares outstanding at the end of the period | 96 683 334 | 73 350 000 | 96 683 334 | 73 350 000 | 96 683 334 | 96 683 334 |
| Average number of shares                              | 96 683 334 | 73 350 000 | 96 683 334 | 73 350 000 | 96 032 832 | 78 433 288 |
| Profit from property management per share, SEK        | 0,48       | 0,58       | 0,22       | 0,31       | 0,90       | 1,06       |
| Earnings per share for the period, SEK                | 0,78       | 0,95       | 0,24       | 0,54       | 1,47       | 1,73       |
| Equity per share, SEK                                 | 15,95      | 14,84      | 15,95      | 14,84      | 15,95      | 15,47      |
| Net asset value per share, SEK                        | 17,65      | 16,76      | 17,65      | 16,76      | 17,65      | 17,10      |

|                                                        | Jan - jun | Jan - jun | Apr - jun | Apr - jun | Jan - jun | Jan - dec |
|--------------------------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| FINANCIAL                                              | 2026      | 2025      | 2026      | 2025      | 25/26     | 2025      |
| Equity ratio, %                                        | 39,7      | 38,4      | 39,7      | 38,4      | 39,7      | 45,6      |
| Loan-to-value (LTV) ratio, %                           | 51,2      | 56,8      | 51,2      | 56,8      | 51,2      | 56,7      |
| Return on equity, %                                    | 9,9       | 13,0      | 6,0       | 14,9      | 10,7      | 10,6      |
| Average tied-up capital period, year                   | 2,1       | 1,8       | 2,1       | 1,8       | 2,1       | 2,7       |
| Average fixed interest period, year                    | 2,0       | 1,7       | 2,0       | 1,7       | 2,0       | 2,6       |
| Average loan interest rate at the end of the period, % | 4,0       | 3,9       | 4,0       | 3,9       | 4,0       | 4,33      |
| Interest coverage ratio, times                         | 2,3       | 2,6       | 2,1       | 2,5       | 2,2       | 2,3       |
| Net debt, SEK thousand                                 | 1 791     | 1 323     | 1 791     | 1 323     | 1 791     | 1 272     |
| Net loan-to-value ratio, %                             | 48,4      | 50,6      | 48,4      | 50,6      | 48,4      | 43,3      |
| Debt-to-income ratio, times                            | 9,9       | 8,2       | 9,9       | 8,2       | 9,9       | 7,5       |

### The 2025 key figures are adjusted for share splits

For definitions, see page 28. For reconciliation of key figures, see page 29.





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## Other Information

Logistri Fastighets AB (publ), with company registration number 559122-8654, is a public limited liability company registered in Sweden with its registered office in Stockholm. The address of the head office is Skeppsbron 26, 111 30 Stockholm. The company's and its subsidiaries' (the Group's) operations include owning, developing and managing properties for warehouse and light industry in Sweden and the Nordic region.

### Employees

The Group had eight employees during the period: the company's CEO, CFO, Property Manager, Technical Manager, Business Developer, Group Accounting Manager and two corporate economists.

### Related party transactions

Transactions between the company and its subsidiaries, which are related to the company, have taken place regarding interest expenses and interest income on internal loans as well as charging of business and property management fees and audits. Pareto Business Management AB has no ownership or controlling influence but is a related party to Logistri Fastighets AB according to IAS 24, by providing services under Business Management Agreements. The agreement with Pareto ended in Q1 2026.

### Material risks and uncertainties

Risk for the Group involves the risk of vacancies as a result of tenants' insolvency or termination of existing leases. The Group runs a limited risk associated with operating and maintenance costs as approximately 99% of the properties are leased with triple net agreements where responsibility for ongoing operation and maintenance as well as property tax lies with the tenant and only planned maintenance (load-bearing structure, roof, facades, installations) is the property owner's responsibility. In nine of the Group's properties, tenants are also responsible for planned maintenance.

Real estate and property-related assets are inherently difficult to value due to the particular nature of each property and the fact that it is not necessarily a liquid market. As a result, valuations can be subject to considerable uncertainty. There is no assurance that the calculations resulting from the valuation process will reflect the actual sale price. A recession in the real estate market can significantly affect the value of property. The valuation is based on an estimate of future payments and payments and a discounting of these with regard to a risk-free interest rate and risk premium. All of these factors are therefore projections of the future and are uncertain.

Liquidity risk refers to the risk that the Group will have problems meeting its obligations related to the Group's financial liabilities. The properties are essentially fully leased and thus the company is dependent on the tenant's finances, financial position and ability to pay, as the company's income in its entirety consists of rental income. The company's risk picture is based on the counterparty and the length of the agreement, which results in leases with a short contract length having a different risk picture than leases with longer contract periods.

Financing risk refers to the risk that the Group will not be able to obtain sufficient financing at a reasonable cost. Payment of interest and operating expenses is handled by the Group receiving rent payments on an ongoing basis. Interest rate risk is defined as how the interest rate level affects earnings and cash flow. For interest-bearing liabilities, the carrying amount is considered to be a good approximation of fair value as they essentially run with a variable interest rate.

### Accounting policies

Logistri Fastighets AB (publ) applies IFRS Accounting Standards as adopted by the EU. This report has been prepared in accordance with IAS 34 Interim Financial Reporting. The Parent Company's interim report has been prepared in accordance with Chapter 9 of the Annual Accounts Act, Interim Report. In addition to the financial statements and their related notes, disclosures pursuant to IAS 34.16A are also disclosed in other parts of the interim report.

For the Group and the Parent Company, the same accounting and valuation principles have been applied as in the most recent consolidated financial statements and the Annual Report, see Logistri Fastighets AB's Annual Report 2025, page 43. Project properties are valued as investment property with a deduction for remaining investments and a deduction for project and time risk.

The company publishes five reports annually: the half-year report, the year-end report, the annual report and two interim reports.

### Audit

This interim report has not been reviewed by the company's auditor.





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# Definitioner

| Key Figures                               | Explanation                                                                                                                                                                                                         | Justification                                                                                                                                    |
|-------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Return on equity                          | Return on equity is calculated as profit for the period, converted to 12 months, divided by average equity during the period.                                                                                       | Shows how the owners' capital is remunerated during the period.                                                                                  |
| Loan-to-value ratio                       | Nominal interest-bearing liabilities divided by the carrying amount of investment properties.                                                                                                                       | Shows the level of indebtedness.                                                                                                                 |
| Net operating income                      | Revenue for the period minus operating and maintenance costs and property tax.                                                                                                                                      | Shows the profitability of the administration before costs for central administration and net financial items.                                   |
| Economic occupancy rate                   | Contracted annual rent in relation to the rental value.                                                                                                                                                             | Shows the economic utilization rate of investment properties.                                                                                    |
| Property property yield                   | Net operating income yield.                                                                                                                                                                                         | Demonstrates profitability before financial costs and central administration costs in relation to the market value of the real estate portfolio. |
| Profit from property management per share | Profit from property management divided by weighted average number of shares during the period.                                                                                                                     | Shows profitability before changes in value.                                                                                                     |
| Rental value                              | Contracted annual rent that runs immediately after the end of the period with a supplement for the assessed market rent for any vacant premises.                                                                    | Shows revenue potential based on current property holdings.                                                                                      |
| Net loan-to-value ratio                   | Net debt divided by the market value of the properties.                                                                                                                                                             | Shows the net level of indebtedness after deduction of cash and cash equivalents.                                                                |
| Net debt                                  | Nominal interest-bearing liabilities decreased by cash and cash equivalents recognised in current receivables.                                                                                                      | Shows indebtedness net net deduction for cash and cash equivalents.                                                                              |
| Earnings per share                        | Profit for the period divided by the average number of shares during the period                                                                                                                                     | Shows the owners' share of the profit.                                                                                                           |
| Interest coverage ratio                   | Profit from property management plus net financial items divided by net financial items                                                                                                                             | Demonstrates the ability to pay interest based on the financial outcome of the operational activities.                                           |
| Debt-to-income ratio                      | Net debt in relation to net operating income less costs relating to central administration according to earning capacity.                                                                                           | Shows a type of financial risk.                                                                                                                  |
| Equity ratio                              | Equity divided by the balance sheet total.                                                                                                                                                                          | Shows the proportion of assets that are financed with equity and highlights financial stability.                                                 |
| Net asset value                           | Reported equity attributable to parent company shareholders with reversal of provisions for interest rate derivatives and deferred tax.                                                                             | Shows net asset value and is an established measure used by listed real estate companies in a uniform way.                                       |
| Net asset value per share                 | Reported equity attributable to the parent company's shareholders with reversal of provisions for interest rate derivatives and deferred tax, in relation to the average number of shares at the end of the period. | Shows the net asset value attributable to the ordinary shareholders.                                                                             |
| Remaining rental period                   | The weighted average remaining term of the leases.                                                                                                                                                                  | Shows risk of future vacancies.                                                                                                                  |
| Surplus ratio                             | Net operating income divided by total revenue.                                                                                                                                                                      | Shows the profitability of property management operations.                                                                                       |





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# Reconciliation of key figures

|                                                         | Jan - jun | Jan - jun | Apr - jun | Apr - jun | Jan - jun | Jan - dec |
|---------------------------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|
|                                                         | 2026      | 2025      | 2026      | 2025      | 25/26     | 2025      |
| Return on equity                                        |           |           |           |           |           |           |
| Profit for the period, KSEK                             | 75 416    | 69 792    | 23 027    | 39 837    | 140 939   | 135 314   |
| Supplement for conversion to annual value, SEK thousand | 75 416    | 69 792    | 69 081    | 119 511   |           |           |
| Average equity, SEK thousand                            | 1 518 960 | 1 072 140 | 1 543 639 | 1 072 140 | 1 315 128 | 1 275 972 |
| Return on equity, %                                     | 9,9       | 13,0      | 6,0       | 14,9      | 10,7      | 10,6      |
| Loan-to-value ratio                                     |           |           |           |           |           |           |
| Borrowing, SEK thousand                                 | 1 894 052 | 1 484 052 | 1 894 052 | 1 484 052 | 1 894 052 | 1 667 428 |
| Property value, SEK thousand                            | 3 697 948 | 2 613 447 | 3 697 948 | 2 613 447 | 3 697 948 | 2 941 458 |
| Loan-to-value (LTV) ratio, %                            | 51,2      | 56,8      | 51,2      | 56,8      | 51,2      | 56,7      |
| Economic occupancy rate                                 |           |           |           |           |           |           |
| Contracted annual rent, SEK thousand                    | 213 879   | 187 114   | 213 879   | 187 114   | 213 879   | 197 675   |
| Rental value, SEK thousand                              | 214 227   | 189 637   | 214 227   | 189 637   | 214 227   | 200 765   |
| Economic occupancy rate, %                              | 99,8      | 98,7      | 99,8      | 98,7      | 99,8      | 98,5      |

|                                                | Jan - jun  | Jan - jun  | Apr - jun  | Apr - jun  | Jan - jun  | Jan - dec  |
|------------------------------------------------|------------|------------|------------|------------|------------|------------|
|                                                | 2026       | 2025       | 2026       | 2025       | 25/26      | 2025       |
| Net operating income yield                     |            |            |            |            |            |            |
| Operating net, thousand SEK                    | 98 195     | 79 198     | 49 837     | 41 564     | 187 637    | 168 641    |
| Holdings adjustment, acquisitions, KSEK        | 107 329    | 89 222     | 149 511    | 126 163    | 10 656     | 22 345     |
| Net operating income adjusted, KSEK            | 205 524    | 168 420    | 199 348    | 167 727    | 198 293    | 190 986    |
| Ludvika                                        | 690 768    | -          | 690 768    | -          | 690 768    | 404 902    |
| Property value excl. Ludvika, SEK thousand     | 3 007 180  | 2 613 447  | 3 007 180  | 2 613 447  | 3 007 180  | 2 536 556  |
| Net operating income yield                     | 6,8        | 6,4        | 6,6        | 6,4        | 6,6        | 7,5        |
| Profit from property management per share      |            |            |            |            |            |            |
| Profit from property management, SEK thousand  | 46 078     | 42 824     | 21 564     | 22 504     | 86 193     | 82 939     |
| Average number of shares                       | 96 683 334 | 73 350 000 | 96 683 334 | 73 350 000 | 96 032 832 | 78 433 288 |
| Profit from property management per share, SEK | 0,48       | 0,58       | 0,22       | 0,31       | 0,90       | 1,06       |
| Long-term net asset value                      |            |            |            |            |            |            |
| Equity, KSEK                                   | 1 541 913  | 1 088 343  | 1 541 913  | 1 088 343  | 1 541 913  | 1 496 007  |
| Derivatives, SEK thousand                      | 2 469      | 4 450      | 2 469      | 4 450      | 2 469      | -1 099     |
| Deferred tax, SEK thousand                     | 161 848    | 136 394    | 161 848    | 136 394    | 161 848    | 158 241    |
| Long-term net asset value, SEK thousand        | 1 706 230  | 1 229 187  | 1 706 230  | 1 229 187  | 1 706 230  | 1 653 149  |
| Long-term net asset value per share            |            |            |            |            |            |            |
| Long-term net asset value, SEK thousand        | 1 706 230  | 1 229 187  | 1 706 230  | 1 229 187  | 1 706 230  | 1 653 149  |
| Number of shares                               | 96 683 334 | 73 350 000 | 96 683 334 | 73 350 000 | 96 683 334 | 96 683 334 |
| Net asset value per share, SEK                 | 17,65      | 16,76      | 17,65      | 16,76      | 17,65      | 17,10      |





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|                                                                    | Jan - jun  | Jan - jun  | Apr - jun  | Apr - jun  | Jan - jun  | Jan - dec  |
|--------------------------------------------------------------------|------------|------------|------------|------------|------------|------------|
|                                                                    | 2026       | 2025       | 2026       | 2025       | 25/26      | 2025       |
| Net debt                                                           |            |            |            |            |            |            |
| Borrowing, SEK thousand                                            | 1 894 052  | 1 484 052  | 1 894 052  | 1 484 052  | 1 894 052  | 1 667 428  |
| Cash and cash equivalents, SEK thousand                            | 102 602    | 129 176    | 102 602    | 129 176    | 102 602    | 394 962    |
| Deposited funds, SEK thousand                                      | -          | 31 398     | -          | 31 398     | -          | -          |
| Net debt, SEK thousand                                             | 1 791 450  | 1 323 478  | 1 791 450  | 1 323 478  | 1 791 450  | 1 272 466  |
| Net loan-to-value ratio                                            |            |            |            |            |            |            |
| Net debt, SEK thousand                                             | 1 791 450  | 1 323 478  | 1 791 450  | 1 323 478  | 1 791 450  | 1 272 466  |
| Property value, SEK thousand                                       | 3 697 948  | 2 613 447  | 3 697 948  | 2 613 447  | 3 697 948  | 2 941 458  |
| Net loan-to-value ratio, %                                         | 48,4       | 50,6       | 48,4       | 50,6       | 48,4       | 43,3       |
| Earnings per share                                                 |            |            |            |            |            |            |
| Profit for the period, KSEK                                        | 75 416     | 69 792     | 23 027     | 39 837     | 140 939    | 135 314    |
| Average number of shares                                           | 96 683 334 | 73 350 000 | 96 683 334 | 73 350 000 | 96 032 832 | 78 433 288 |
| Earnings per share for the period, SEK                             | 0,78       | 0,95       | 0,24       | 0,54       | 1,47       | 1,73       |
| Interest coverage ratio                                            |            |            |            |            |            |            |
| Profit from property management plus net financial items, KSEK     | 82 861     | 70 421     | 41 249     | 37 239     | 159 227    | 146 787    |
| Net financial items, SEK thousand                                  | 36 783     | 27 597     | 19 685     | 14 735     | 73 034     | 63 848     |
| Interest coverage ratio, times                                     | 2,3        | 2,6        | 2,1        | 2,5        | 2,2        | 2,3        |
| Debt-to-income ratio                                               |            |            |            |            |            |            |
| Net debt, SEK thousand                                             | 1 791 450  | 1 323 478  | 1 791 450  | 1 323 478  | 1 791 450  | 1 272 466  |
| Net operating income according to earning capacity, KSEK           | 202 604    | 176 503    | 202 604    | 176 503    | 202 604    | 190 320    |
| Central administration according to earning capacity, SEK thousand | -22 148    | -15 031    | -22 148    | -15 031    | -22 148    | -19 727    |
| Debt-to-income ratio, times                                        | 9,9        | 8,2        | 9,9        | 8,2        | 9,9        | 7,5        |

|                                    | Jan - jun  | Jan - jun  | Apr - jun  | Apr - jun  | Jan - jun  | Jan - dec  |
|------------------------------------|------------|------------|------------|------------|------------|------------|
|                                    | 2026       | 2025       | 2026       | 2025       | 25/26      | 2025       |
| Equity ratio                       |            |            |            |            |            |            |
| Equity, KSEK                       | 1 541 913  | 1 088 343  | 1 541 913  | 1 088 343  | 1 541 913  | 1 496 007  |
| Balance sheet total, KSEK          | 3 883 911  | 2 834 899  | 3 883 911  | 2 834 899  | 3 883 911  | 3 382 869  |
| Equity ratio, %                    | 39,7       | 38,4       | 39,7       | 38,4       | 39,7       | 44,2       |
| Surplus ratio                      |            |            |            |            |            |            |
| Net operating income, SEK thousand | 98 195     | 79 198     | 49 837     | 41 564     | 187 637    | 168 641    |
| Total rental income, SEK thousand  | 106 783    | 85 466     | 54 648     | 44 837     | 205 140    | 183 825    |
| Surplus rate, %                    | 92,0       | 92,7       | 91,2       | 92,7       | 91,5       | 91,7       |
| Equity per share                   |            |            |            |            |            |            |
| Equity, KSEK                       | 1 541 913  | 1 088 343  | 1 541 913  | 1088 343   | 1 541 913  | 1 496 007  |
| Number of shares                   | 96 683 334 | 73 350 000 | 96 683 334 | 73 350 000 | 96 683 334 | 96 683 334 |
| Equity per share, SEK              | 15,9       | 14,8       | 15,9       | 14,8       | 15,9       | 15,5       |







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→ **Certification of the Board of Directors**

# Certification of the Board of Directors

The Board of Directors and the President and CEO ensure that the interim report provides a fair overview of the company and the Group's operations, position and results and describes the material risks and uncertainties faced by the company and the companies in the Group.

This interim report for Logistri Fastighets AB (publ) was approved by the Board of Directors on August 20, 2026.

*Stockholm, August 20, 2026*

Logistri Fastighets AB  
Org.nr: **559122-8654**

|                                                   |                                         |                                          |
|---------------------------------------------------|-----------------------------------------|------------------------------------------|
| <b>Henrik Viktorsson</b><br>Chairman of the Board | <b>Patrik von Hacht</b><br>Board member | <b>Johanna Bjärnemyr</b><br>Board member |
| <b>Mattias Ståhlgren</b><br>Board member          | <b>Robin Englén</b><br>Board member     | <b>Cecilia Ekeblom</b><br>Board member   |

**David Träff**  
CEO

## Information about MAR

The information in this interim report is information that Logistri Fastighets AB (publ) is obliged to make public pursuant to the EU Market Abuse Regulation. The information was submitted for publication, through the agency of the contact person, on August 20, 2026.

## Upcoming reporting opportunities

|                   |                        |
|-------------------|------------------------|
| November 12, 2026 | Interim Report Q3 2026 |
| February 11, 2027 | Interim Report Q4 2026 |

## Upcoming dividends

| SEK per share | X-day      | Payout     |
|---------------|------------|------------|
| 0,07          | 2026-09-29 | 2026-10-05 |
| 0,07          | 2026-12-29 | 2027-01-07 |





## For further information

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