

SWORD

UPGRADE YOUR BUSINESS

Sword Group 2015 Fourth Quarterly Results Outperformance in terms of:

Revenue: €36.0 M

EBITDA Margin: 16.1%

Organic Growth: + 20.4 %

Sword Group Q4 2015 ⁽¹⁾

Consolidated

Growth: + 18.0 %

EBITDA: €5.8 M (16.1%)

Sword Group 2015 ⁽¹⁾

Organic Growth: 22.5 %

Consolidated Growth: + 17.5%

EBITDA margin: 15.7 %

⁽¹⁾ Non audited Figures

Investor Relations

e investorrelations@sword-group.lu

Sword Group

1 400+ staff

Listed on Euronext Paris - Compartment B

ISIN Code: FR0004180578

ICB: 9530 Logiciels et Services Informatiques

Indices:

CAC® Small

CAC® Mid & Small

CAC® All-Tradable

CAC® All-Share

About Sword Group

Sword Group is an international Consulting, Service and Software Company driving global leaders in their digital & technology transformation.

Created in November 2000, the group has a current headcount of 1,400+ staff (31/12/2015) operating in more than 50 countries.

Sword generates €137.6m in consolidated revenue in 2015.

Sword offers its customers comprehensive and integrated responses, on both the strategic approach and the execution.

In order to meet the strategic challenges of its clients, the adaptation demands of their information systems and the evolution needs of their business processes, Sword is organised around specialised competence centres. The group guarantees to customers the provision of proximity services, high-added value know-how, high production capacity and optimised economic approaches.

The 5 main areas of activity of the Group:

Sword Consulting advises CXOs in their strategy and through accomplishment

Sword Services enables new technologies within complex Business & IT landscapes

Sword Digital accelerates companies' internal & external digitalization programs

Sword Performance enables customers to manage IT Performance

Sword Software provides global solutions in asset finance and GRC

More information on www.sword-group.com



© Sword Group
2, rue d'Arlon
L-8399 Windhof



Windhof - January 25th 2016,

€M	Q4 ⁽¹⁾		
	2015	2014	Growth
Consolidated	2015	2014	Growth
Revenue	36.0	30.5	+ 18.0%
EBITDA	5.8	4.9	+ 18.4%
EBITDA Margin	16.1%	16.1%	-

€M	Q4 ⁽¹⁾		
On a like-for-like basis	2015	2014	Growth
Revenue	36.0	29.9	+ 20.4 %

⁽¹⁾ Non audited Figures

ANALYSIS

FY2015 Growth

Organic Growth for 2015 on a like-for-like basis amounts to + 22.5 %.

In sectorial terms, the growth for each of the divisions is:

- Software: + 28.7%
- Services: + 19.5%

After adjustment for exchange rate fluctuations, growth for 2015 amounts to 15.1% and per division, the rates are respectively:

- Software: + 18.4%
- Services: + 13.6%

The 2015 forecasted growth was 12%. The annual outperformance is 3 points.

EXTRACT FROM THE FY2015 CONSOLIDATED ACCOUNTS

€M Consolidated	2015 ⁽¹⁾	2014
Revenue	137.6	117.1
EBITDA	21.6	18.9

⁽¹⁾ Non audited Figures

EVENTS CONCERNING THE PERIMETER

During the first part of the year, a few minor adjustments, were made to the perimeter through the sale of assets not within the scope of Sword's long-term strategy.

2 entities were sold to their Management:

- Kenzan, on 1 July,
- A Charteris Business Unit, on 1 August.

Their cumulated revenue, budgeted for 2015, amounted to €4.7 million.

As of 1 December 2015, the AAA company, specialised in managed services, outsourced projects and recruitment, was consolidated. Its annual revenue calculated at current exchange rates amounts to €10.8 M.

Accordingly, the FY2015 pro forma revenue, calculated with the current exchange rates, based on the perimeter of January 2016 1st is €144.9 M.

OUTLOOK

The Group expects a 2016 organic growth, at constant exchange rates, of 15% with an EBITDA margin of 15%.