Information on the Issuer's results

(Current Report No. 7/2026)

28.01.2026 (Issuer)

Legal basis:
Article 17(1) of the Market Abuse Regulation – Inside information

With reference to current report No. 57/2025, CCC S.A. (the "**Issuer**") informs about the verification of the expected level of consolidated EBITDA in 2025 based on the actual performance of the first two months of the fourth quarter of the financial year and the estimated financial results for January.

As at the date of publication of this report, the Issuer expects the EBITDA of the Issuer's capital group in 2025 to range from PLN 1,430 to 1,470 million (i.e. from PLN 180 to PLN 220 million in the fourth quarter of the 2025 financial year). Main differences in relation to the previous assumptions for the Group's results in the fourth quarter:

1. Lower sales revenue by approximately PLN 500 million (due to lower than expected LFL sales (slightly negative yoy) and lower sales growth in the e-commerce segment);
2. Gross margin lower by approx. 2 p.p. (due to increased promotional activity aimed at stimulating traffic);
3. One-off events (including write-offs on substandard goods, an increase in write-offs on receivables, and the unfavorable impact of exchange rates) – impact on the result of approx. PLN 65 million.

At the same time, sales and administrative costs were lower than originally assumed by approximately PLN 80 million.

Broken down by reporting segments, the Issuer expects a 18% EBITDA margin for HalfPrice, 7% for CCC (of which 14% for CCC Omnichannel[1]), and approximately -2% for the Modivo Group in the fourth quarter of 2025.

In addition, due to lower-than-planned sales and the acceleration of deliveries of the spring-summer collection, the Issuer expects the Group's inventory level at the end of 2025 to be slightly higher than previously assumed (approximately PLN 3.7 billion[2]).

[1] Covers only the operational activities of CCC stationary stores and e-commerce
[2] Does not take into account the possible consolidation of MKRI sp. z o.o.

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The Issuer reserves that the estimates presented above reflect its current state of knowledge. Complete and final data will be published in the consolidated annual report for 2025, which is due to be published on 30th of April 2026.

At the same time, in 2026, the Issuer expects a significant improvement in the Group's results year-on-year, which will be mainly contributed to by:

1. Retail space higher at the beginning of the new financial year by 28% year-on-year (and 36% including Worldbox franchise stores);
2. Development of new floorspace (approximately +25% yoy);
3. Expected higher gross margin – better collection purchase terms (deliveries, exchange rates, freight), lower discount scale, higher share of licensed brands in sales;
4. Lower cost ratio – mainly the effect of operating leverage (higher sales/sqm for stores opened before 2026 – the so-called maturing effect, lower share of newly opened stores in the total number of stores) and the new, more cost-effective HalfPrice logistics.

The Issuer maintains its plan to buy back its own shares.

Signatures:

1/ Łukasz Stelmach – Vice President of the Management Board

2/ Edyta Skrzypiec-Rychlik – Proxy