Investor Presentation Q3 FY2026

TRUSTED TO DELIVER. **BUILT FOR GROWTH.**

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Safe harbour

The statements in this presentation relating to matters that are not historical fact are forward-looking statements that are based on management's beliefs and assumptions.

Such statements are not guarantees of future performance, and are subject to a number of uncertainties, including but not limited to future economic conditions, the markets that Tecsys Inc. serves, the actions of competitors, major new technological trends and other factors beyond the control of Tecsys Inc., which could cause actual results to differ materially from such statements.

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Tecsys at a glance

Purpose:

To empower good companies to be great

Position:

To clarify uncertainty in the supply chain

Mission:

To equip supply chain greatness

Vision:

That good companies have the space to thrive

Our story is all about our customers

40+ years
of complex supply network experience

14 times
Tecsys named in Gartner's Magic Quadrant for WMS

40%
of Gartner's Healthcare Supply Chain Top 25 for 2025 are customers

Trusted provider of supply chain technology
for the world's most complex supply networks

Great Place To Work. Certified JUL 2025-JUL 2026 USA
Inbound Logistics Top 100 Logistics IT Provider 2024
Pros to Know 2025 Supply Chain Executive
SupplyChainBrain Great Supply Chain Partner 2024
2024 Supply Chain Management Software Top Performer
Nucleus Research 2024 Value Matrix Leader
Food Logistics Supply & Demand Chain Executive Top Software & Tech Awards 2024
Report on Business Canada's Top Growing Companies
Award Winning Top 100 Logistics IT Providers
Women in Supply Chain 2024 Food Logistics Supply & Demand Chain Executive

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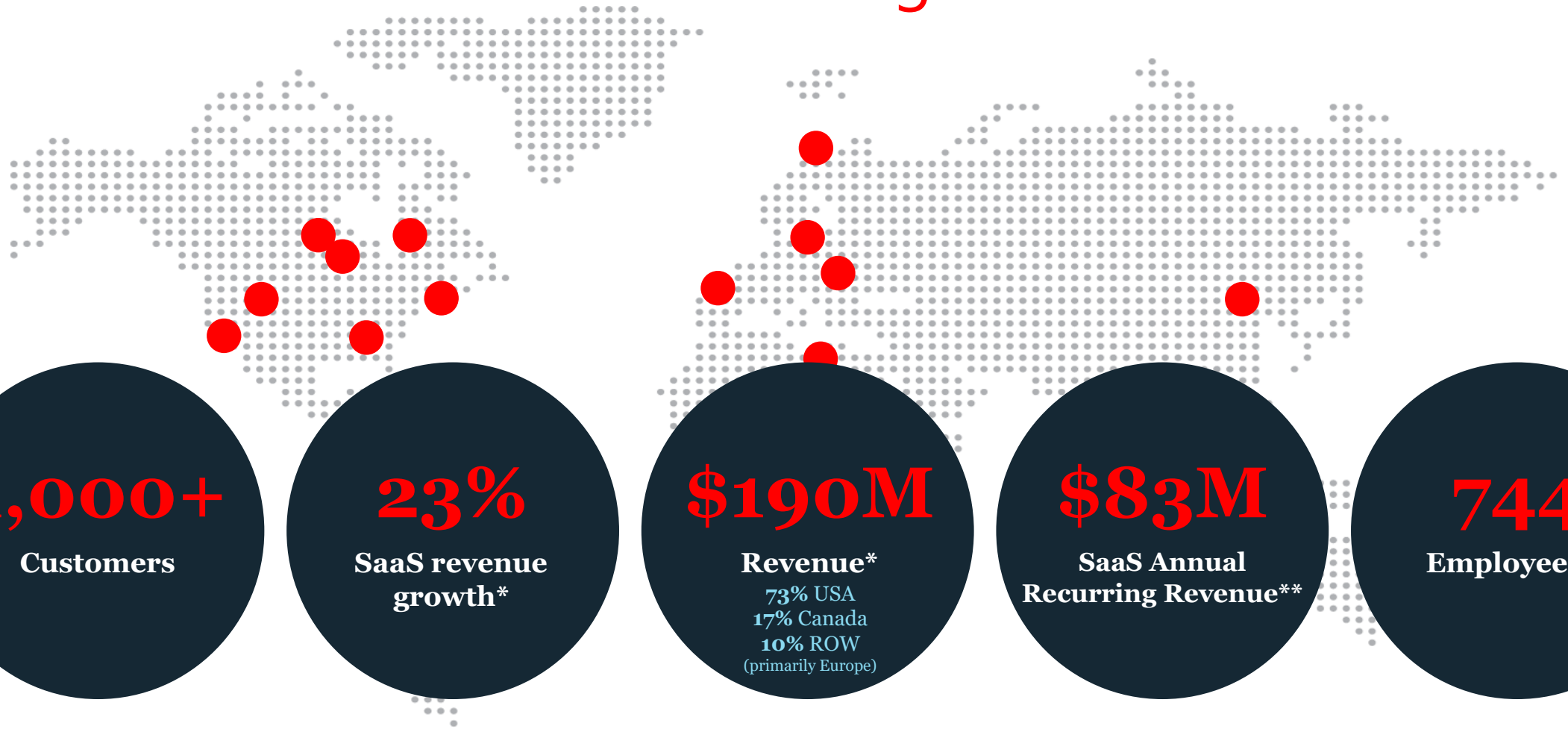
Global reach and financial strength



1,000+
Customers

23%
SaaS revenue growth*

$190M
Revenue*
73% USA
17% Canada
10% ROW
(primarily Europe)

$83M
SaaS Annual Recurring Revenue**

744
Employees**

* Last twelve months, January 31, 2026
** On January 31, 2026

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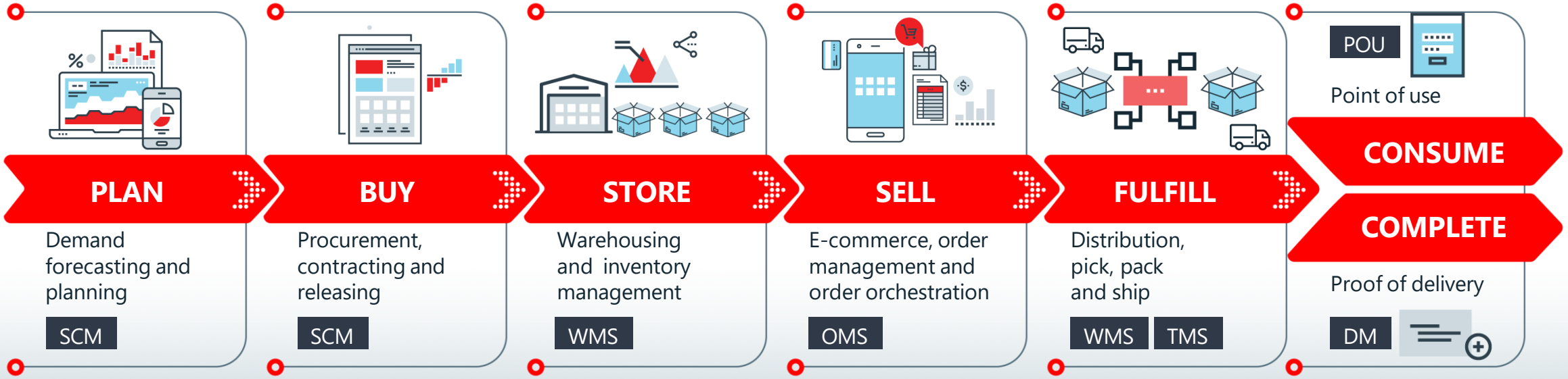
End-to-end integrated supply chain management solutions
An AI enabled technology platform for success



Pre-Trained gen-AI
Customer gen-AI
Prebuilt agentic AI
Clean data
Dashboards
Forecasts

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Elite™

Elastic cloud infrastructure
Security and access
Upgrades and reliability
Connectors and certifications
Observability

Itopia®

Apps
Workflows
Automation
API and events
Templates

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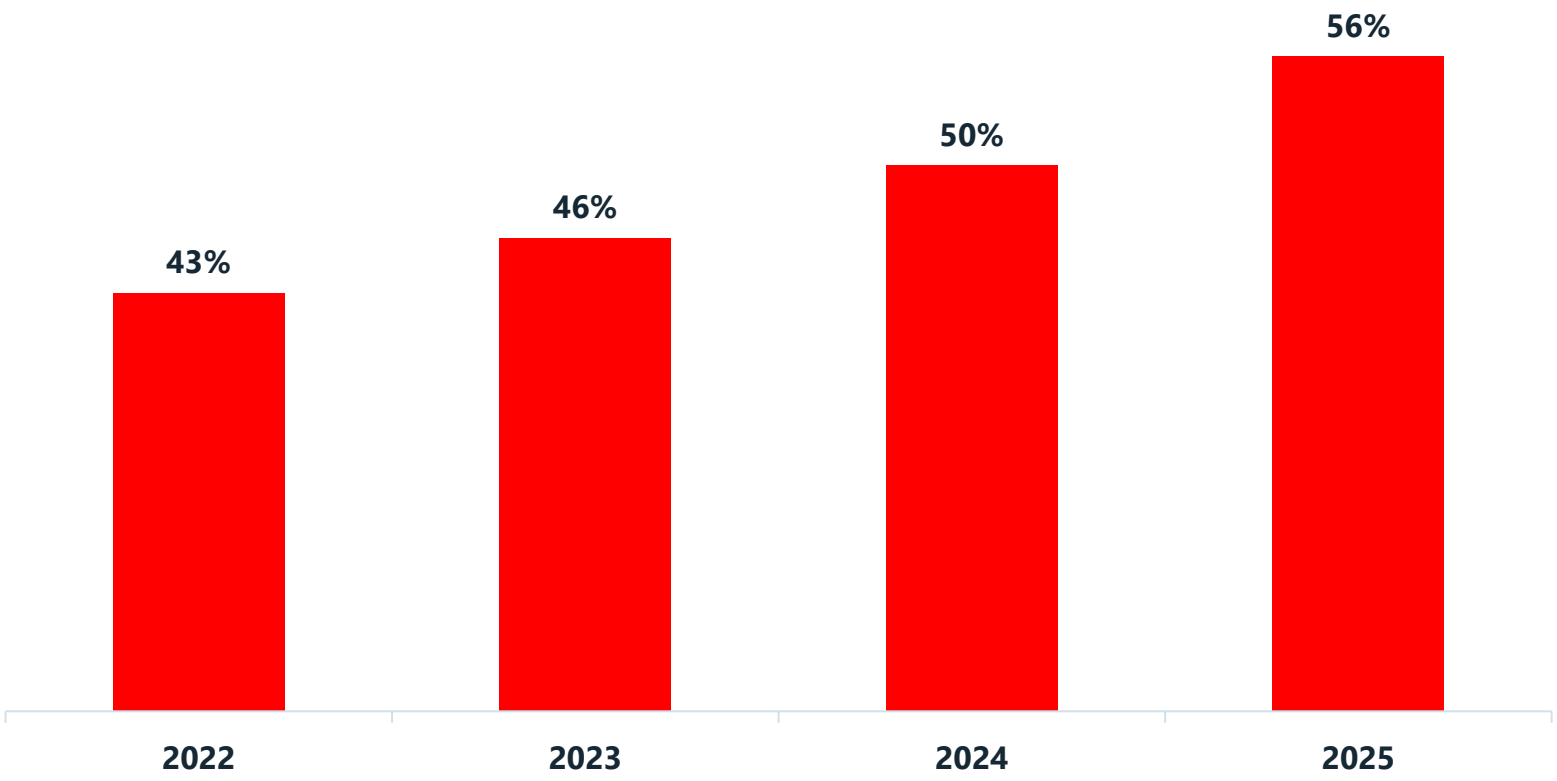
Recurring Revenue Evolution

Recurring revenue as a percentage of total revenue



SaaS growth driving recurring revenue to 56% of total revenue for the year ended April 30, 2025 (57% LTM as of January 31, 2026)

Customers

Percentage of SaaS annual recurring revenue

Healthcare

81%

19%

General distribution

St Luke's
McLeod Health
Mercy
UNC HEALTH
PARKVIEW HEALTH
SANFORD HEALTH
VANDERBILT HEALTH
PRISMA HEALTH
Wellstar HEALTH SYSTEM
Banner Health
CONCORD HOSPITAL
Trinity Health
UHealth UNIVERSITY OF MIAMI HEALTH SYSTEM
Intermountain Health
GUNDERSEN HEALTH SYSTEM
AdventHealth
CHUM
NDC Delivering Efficiency to Healthcare
Texas Children's Hospital
Children's Healthcare of Atlanta
UW Medicine
DISTRIBUTION COOPERATIVE, INC.

CardinalHealth
Canon
Rayner
NISSAN
LifeScience Logistics
Milton CAT
REXEL
Schaedler yesco
Roche
HAGEN GROUP
WALTER Surface Technologies
ACCURISTIX ADVANCING HEALTHCARE LOGISTICS
KWE
Magasin
Fuel
CAPACITY LLC
POLITIX
Humana
NYC Health
DELMAR www.delmarcargo.com
Browns
WERNER ELECTRIC SUPPLY

Solutions built on experience: Delivering end-to-end solutions with technology and services

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Healthcare supply chains are stressed

- Point of use breakdowns
- Drug shortages dominate disruptions
- Lack real-time visibility across inventory and care settings

- Standardization and data-sharing across networks
- Extraordinary pressure on supply chain to deliver
- Regulatory requirements

Result: Healthcare supply chains need solutions urgently

Opportunity: Tecsys is considered the **leader** in solving these issues for IDNs

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Total supply chain software ARR market size

Target addressable market

GENERAL DISTRIBUTION

$9.6B

U.S./CAN: **$6B**
W. EU: **$3.6B**

HEALTH SYSTEMS AND PROVIDERS

$2.7B

U.S./CAN

Western European market estimated at 60% of U.S./Canada market

All amounts are presented in Canadian dollars (CAD)

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Narrowing our focus: End-to-end healthcare supply chain

Key segments within total addressable market

GENERAL DISTRIBUTION

Focus areas
Life sciences and biomedical
Medical and pharmaceutical distribution
Healthcare and pharmaceutical 3PLs
Digital pharmacies
Veterinary supply distributors

$1.5B

U.S./CAN: **$943M**
W. EU: **$596M**

HEALTH SYSTEMS AND PROVIDERS

Focus areas
Large IDNs
Multisite health systems
Large standalone hospitals

$1.5B

U.S./CAN

Western European market estimated at 60% of U.S./Canada market

All amounts are presented in Canadian dollars (CAD)

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U.S. health systems and providers market opportunity

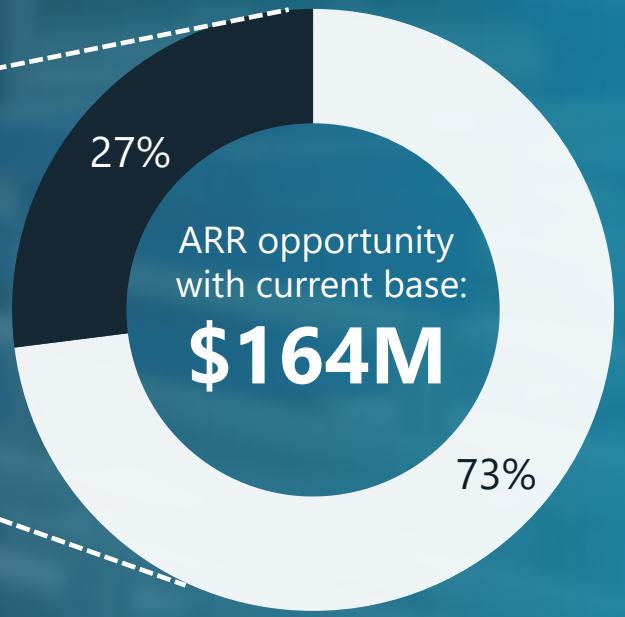
Becoming dominant in U.S. health systems market: The $1.5B ARR* opportunity

382

Target health systems

Health systems market share

Base account penetration



■ Market opportunity ■ Current share

■ Market opportunity

* Annual Recurring Revenue, CAD

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Additional ARR from markets where we excel

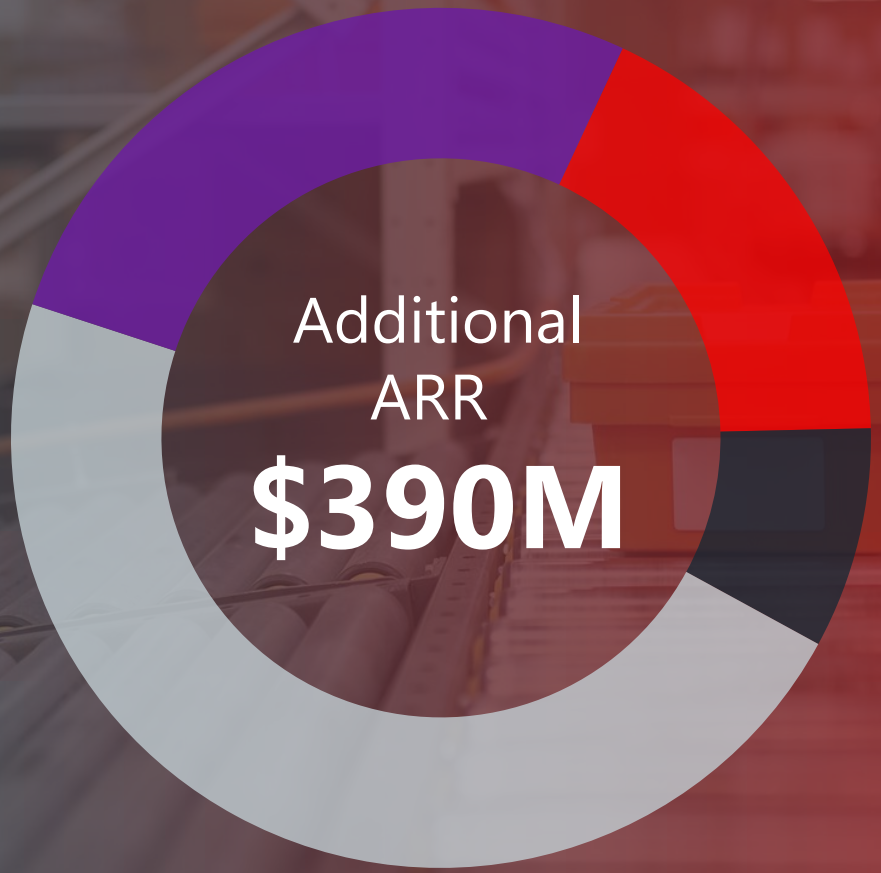
Opportunities within selected non-healthcare market segments in U.S., Canada and Western Europe

RETAIL AND E-COMMERCE

$105M

INDUSTRIAL AND ELECTRICAL SUPPLY

$183M



GENERAL MARKETS 3PL PROVIDERS

$69M

HEAVY MACHINERY

$32M

All amounts are presented in Canadian dollars (CAD)

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The heartbeat of modern supply chains

VISIBILITY. AGILITY.
CONFIDENCE IN EVERY OUTCOME.

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Delivering exceptional innovation and service together

Partner ecosystem - Accelerate growth

Technology partners

AWS, Workday, Oracle, Locus Robotics, Zebra Technologies, TraceLink and Autostore

- Complementary solutions
- Specific vertical
- Market reach
- Access to a customer base
- Market share

Advisory and service partners

Deloitte, KPMG, Avalon CSC, RiseNow Consulting, Sequoia Group and Berkeley Research Group (BRG)

- Complementary services
- Aligned vertical focus
- Access to a customer base
- Strong local network
- Resource augmentation

Partner influenced current sales pipeline | **Q3 FY26: 29%**

TERSO SOLUTIONS workday. Microsoft aws shopify ORACLE RiseNow ZEBRA Avalon SVT ROBOTICS LOCUS ROBOTICS tracelink NETWORK FOR GREATER GOOD

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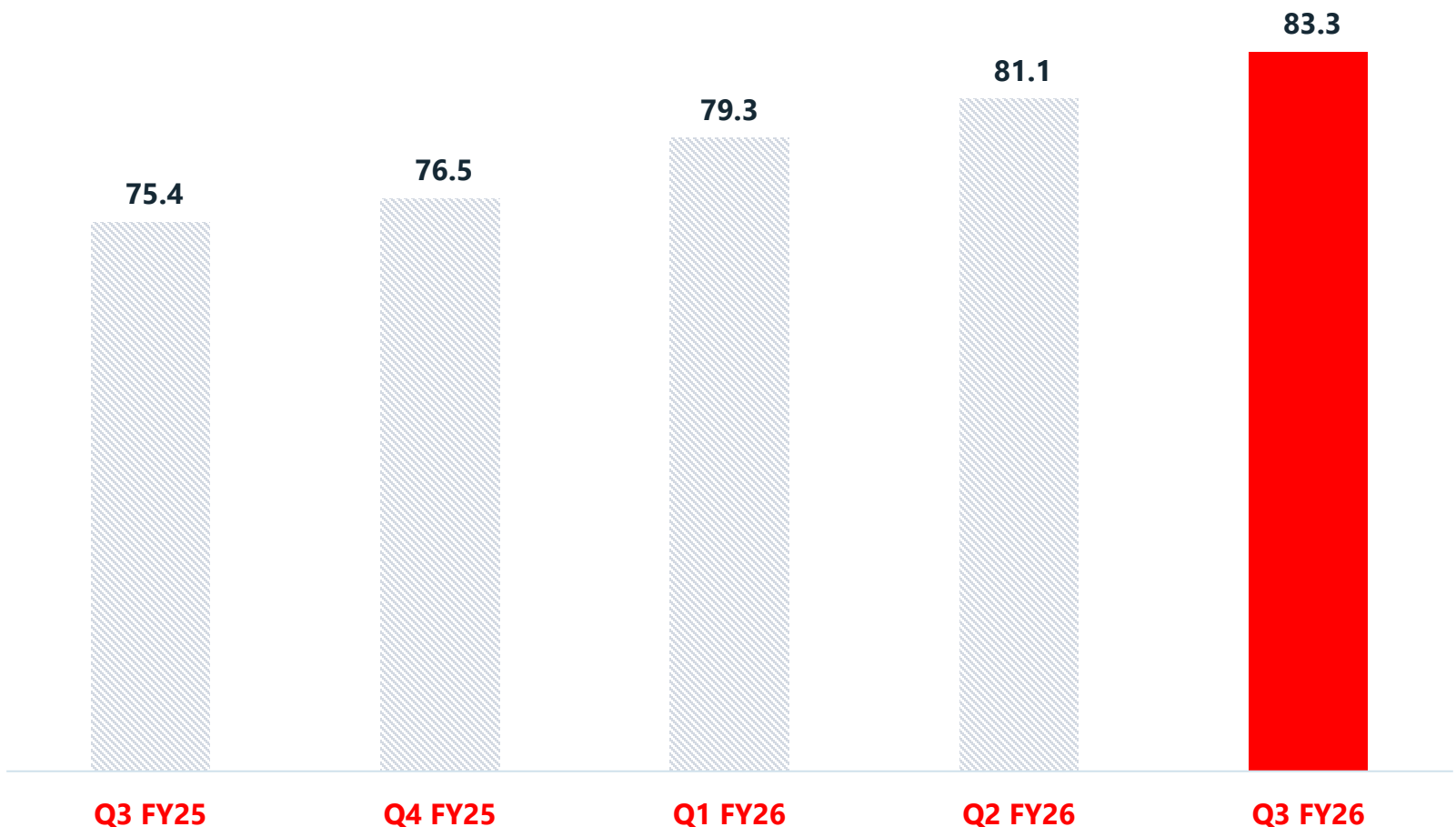
SaaS Annual Recurring Revenue (ARR)[1] growth

in $CAD millions



17%

Q3 FY26 Elite™ SaaS ARR[2] growth YoY (23% on a constant currency basis)

10%

Q3 FY26 SaaS ARR[1] growth YoY (16% on a constant currency basis)

[1] Refer to January 31, 2026, Management Discussion and Analysis "Key Performance Indicators"
[2] Elite™ SaaS refers to our core product and predominant contributor to total SaaS ARR

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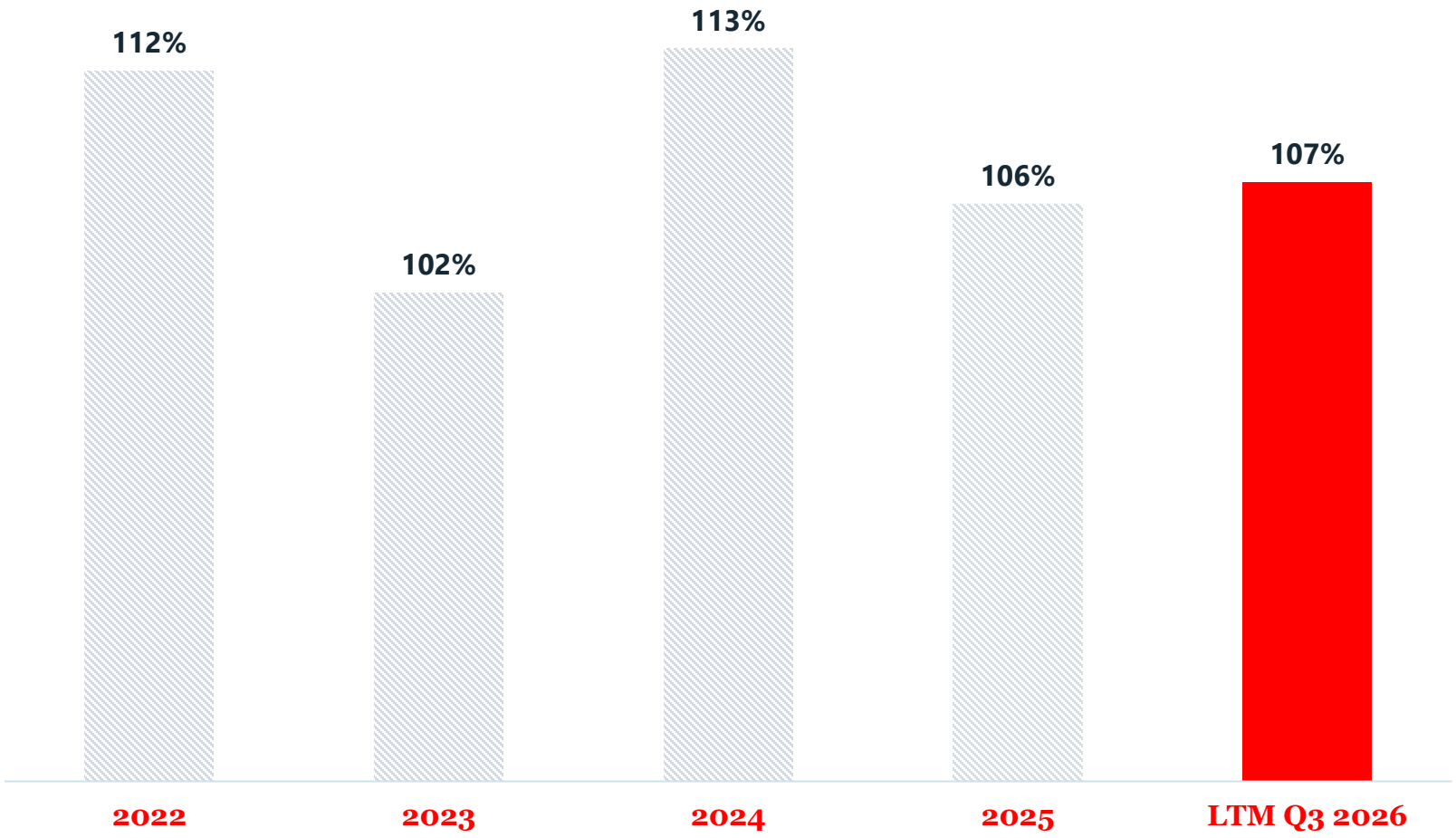
Elite™ SaaS ARR Net Retention Rate



107%

LTM Q3 2026 Elite™ SaaS Recurring Revenue net retention rate

Net Retention = (Existing customer expansion less churn) divided by Beginning period Elite™ SaaS ARR

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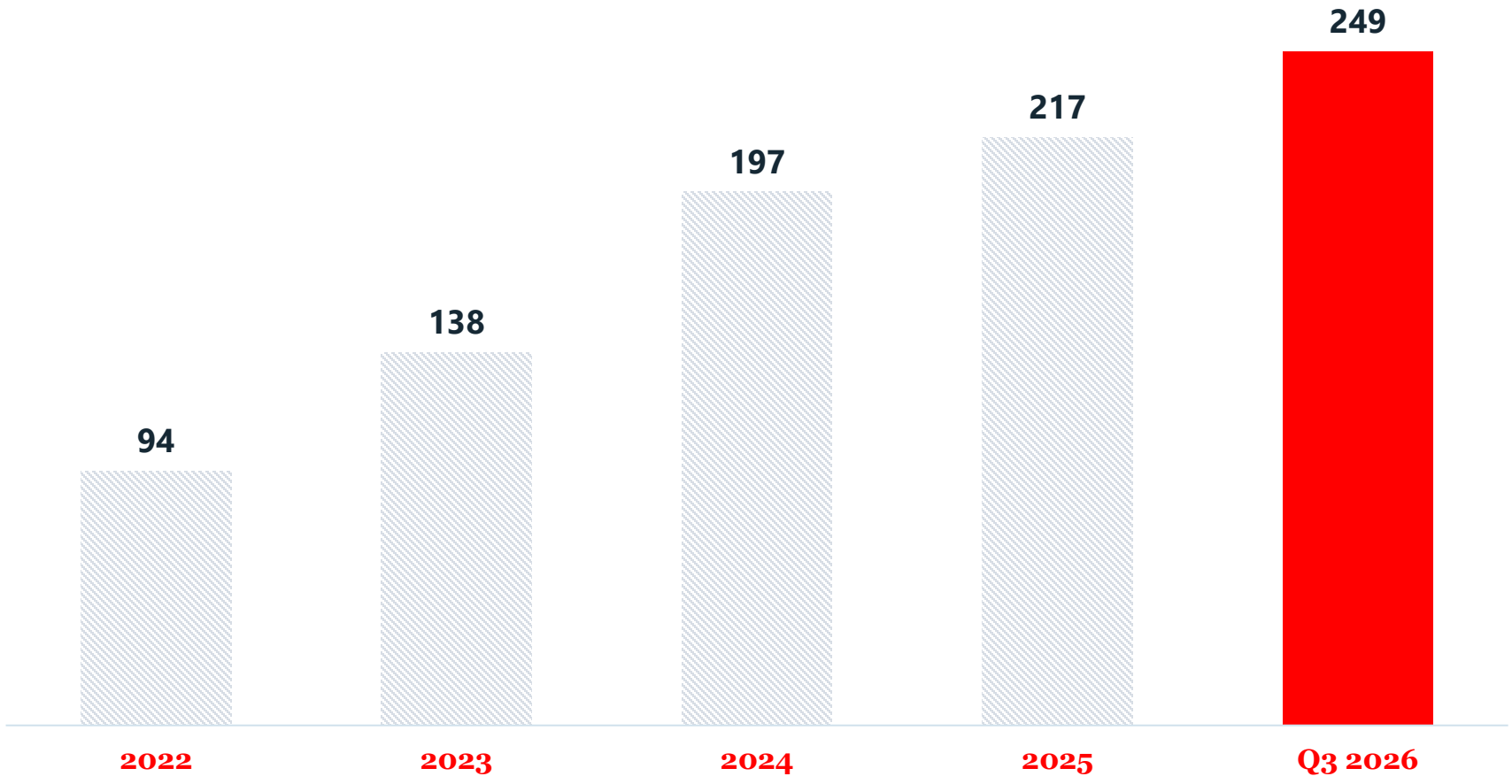
SaaS Remaining Performance Obligation (RPO)[1]

in $CAD millions

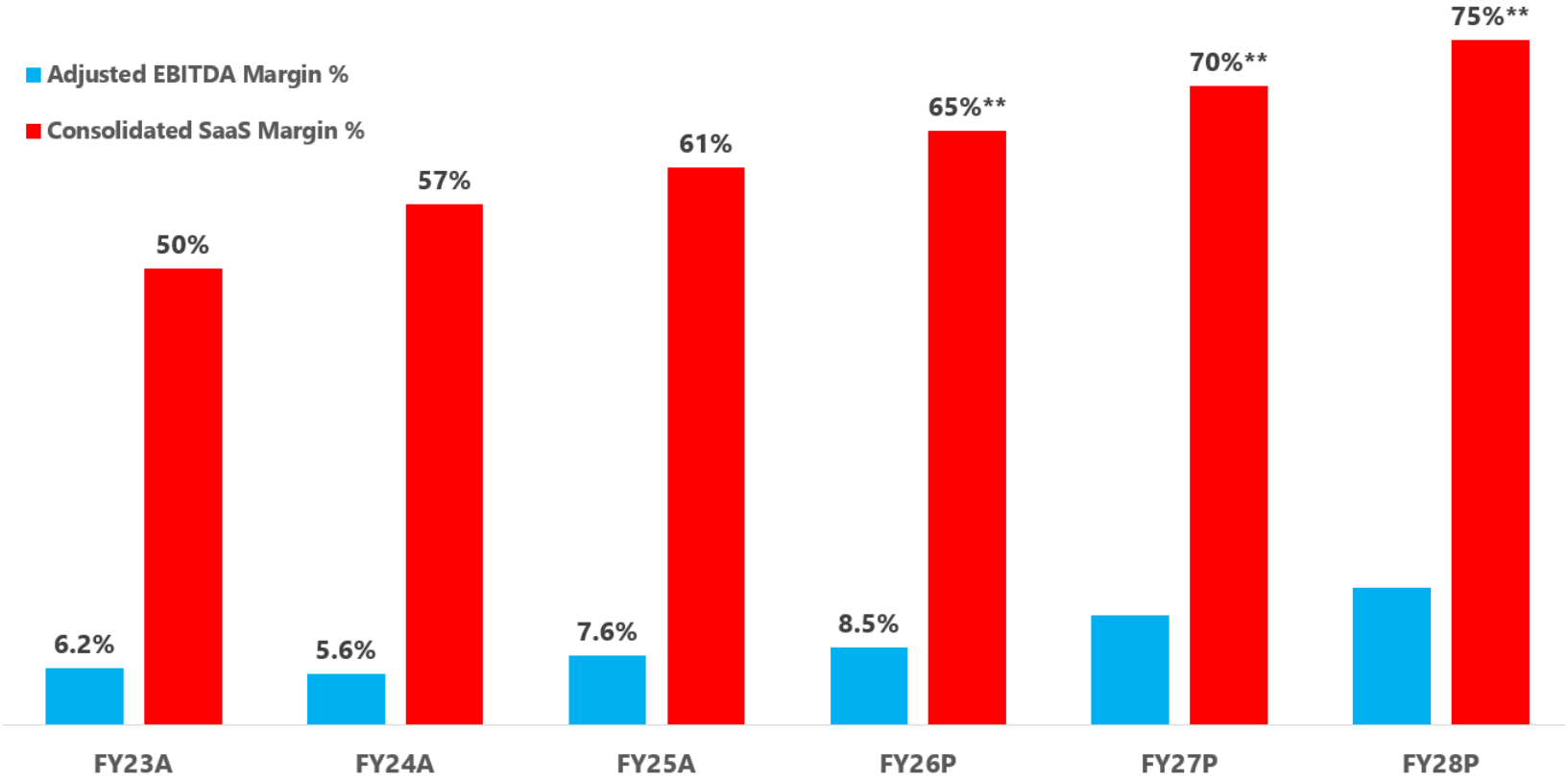


18%

Q3 FY26 SaaS RPO[1] YoY Growth (24% on a constant currency basis)

[1] Refer to January 31, 2026, Management Discussion and Analysis "Key Performance Indicators"

Projected* SaaS margin expansion



- Previously sub-scale SaaS business at an inflection point.
- Current Elite™ product margins on latest infrastructure are running at over 75%.
- AEBITDA FY26P represents guidance mid-point.
- AEBITDA FY27P and FY28P are directional targets.

* Refer to January 31, 2026, Management Discussion and Analysis "Forward-Looking Information"

** Elite™ SaaS margin

Financial highlights

in $CAD thousands except EPS

	Q3 2026		Q3 2025		Δ YoY		Q3 2026 TTM		Q3 2025 TTM		Δ YoY	
	$	%	$	%	$	%	$	%	$	%	$	%
SaaS Revenue	20,131	42%	17,252	38%	2,879	17%	77,299	41%	62,887	36%	14,412	23%
Maintenance and Support Revenue	7,752	16%	8,142	18%	(390)	-5%	31,221	16%	32,700	19%	(1,479)	-5%
Professional Services Revenue	14,976	31%	13,920	31%	1,056	8%	64,228	34%	55,842	32%	8,386	15%
License Revenue	595	1%	212	0%	383	181%	1,071	1%	1,799	1%	(728)	-40%
Hardware Revenue	5,042	10%	5,655	13%	(613)	-11%	15,833	8%	20,626	12%	(4,793)	-23%
Total Revenue	48,496	100%	45,181	100%	3,315	7%	189,652	100%	173,854	100%	15,798	9%
Cost of Revenue	23,895	49%	23,907	53%	(12)	0%	92,286	49%	91,790	53%	496	1%
Gross Profit	24,601	51%	21,274	47%	3,327	16%	97,366	51%	82,064	47%	15,302	19%
Sales & Marketing	9,821	20%	9,053	20%	768	8%	39,740	21%	34,894	20%	4,846	14%
General and Administration	3,521	7%	3,096	7%	425	14%	14,301	8%	12,537	7%	1,764	14%
Research and Development	8,077	17%	7,114	16%	963	14%	32,941	17%	29,085	17%	3,856	13%
Restructuring Costs	-	0%	-	0%	-	-	0	0%	2,122	1%	(2,122)	-100%
Operating Expenses	21,419	44%	19,263	43%	2,156	11%	86,982	46%	78,638	45%	8,344	11%
Profit from Operations	3,182	7%	2,011	4%	1,171	58%	10,384	5%	3,426	2%	6,958	203%
Net Profit	1,734	4%	1,193	3%	541	45%	5,972	3%	3,008	2%	2,964	99%
Adjusted EBITDA	5,046	10%	3,535	8%	1,511	43%	17,605	9%	11,848	7%	5,757	49%
EPS Basic	0.12		0.08		0.04	50%	0.41		0.21		0.20	95%
EPS Diluted	0.12		0.08		0.04	50%	0.40		0.20		0.20	100%
SaaS ARR							83,282		75,438		7,844	10%
SaaS RPO							248,874		210,181		38,693	18%
Professional Services Backlog							36,030		44,430		(8,400)	-19%

Refer to January 31, 2026, Management Discussion and Analysis "Non-IFRS Performance Measures"

Refer to January 31, 2026, Management Discussion and Analysis "Key Performance Indicators"

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Corporate overview

$382M
Market cap**
14.6M S/O

TMX
Symbol TCS

35¢
Dividend per year*

16%
Insider ownership**

Brokerage coverage

- ATB Cormark Capital Markets
- National Bank Financial
- Raymond James
- Stifel
- Ventum Financial

* Last twelve months, January 31, 2026
** On January 31, 2026

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Reasons to invest

$3B ARR TAM

Well positioned to **dominate global $3B ARR TAM** across health systems and targeted distribution markets

23% SaaS revenue growth

LTM January 31, 2026, YoY SaaS revenue growth of 23%

1.8x NTM EV/sales

Trading at 1.8x NTM EV/sales, a 73% discount to its closest comparable MANH

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Thank you