

The heartbeat of modern supply chains.
VISIBILITY. AGILITY. CONFIDENCE IN EVERY OUTCOME.



Investor Presentation Q4 FY2026

TRUSTED TO DELIVER.
BUILT FOR GROWTH.

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.

All names, trademarks, products and services mentioned are registered or unregistered trademarks of their respective owners.



TECSYS AT A GLANCE

Our story is all about our customers

OUR VISION

To ensure the most complex supply chains run without skipping a beat — with visibility, agility and confidence, even in the most unpredictable environments.

OUR MISSION

We power supply chains that work in the real world — combining flexible solutions with trusted expertise to deliver real results.

OUR PROMISE

We work alongside our customers to solve complex supply chain challenges and deliver clarity, control and confidence they can count on.

40+ years

of complex
supply chain
experience

15 times

Tecsys named in
the Gartner Magic
Quadrant for WMS

40%

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

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

Modern Healthcare
2025 BEST IN BUSINESS

INBOUND LOGISTICS
TOP 100
LOGISTICS IT PROVIDER 2026

PROS KNOW
2025
EXECUTIVE

**PHARMACY
500**

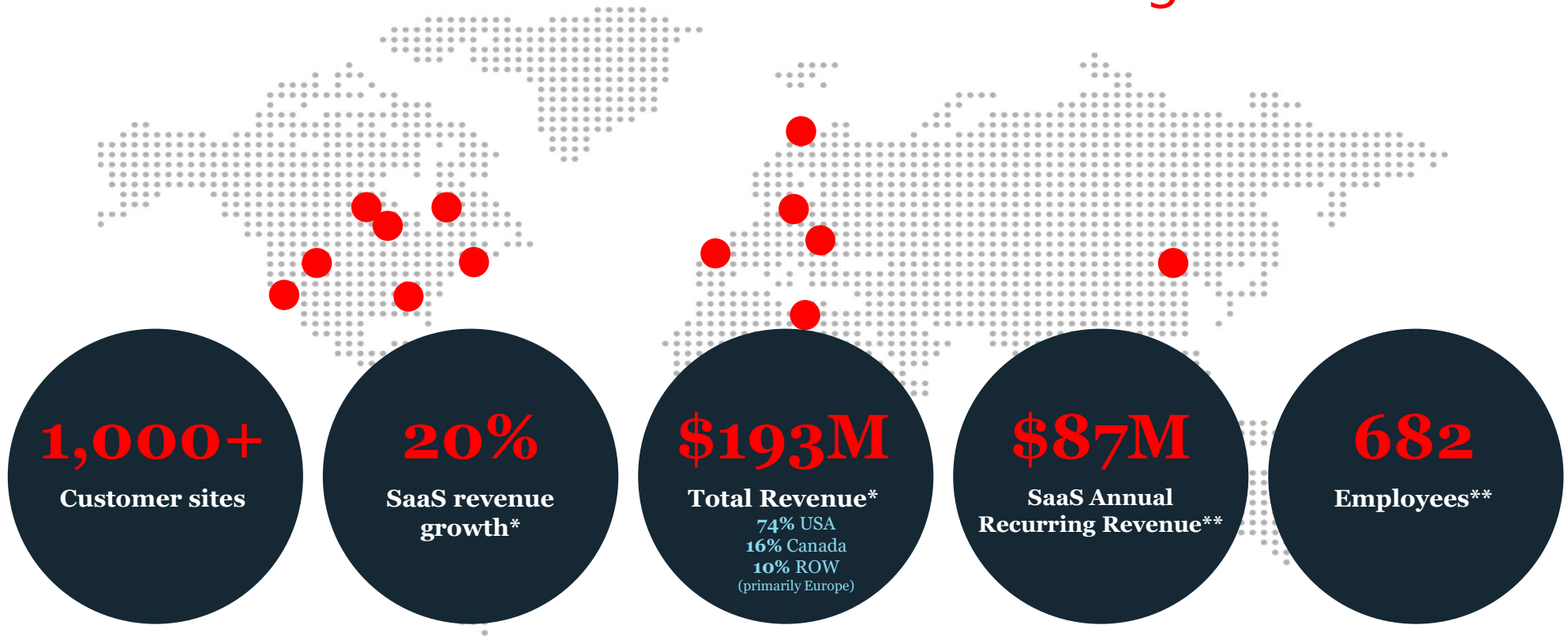
Best Workplaces™
Great Place To Work.
CANADA 2026

Best Workplaces™
for Women
Great Place To Work.
CANADA 2026

REPORT ON BUSINESS
CANADA'S TOP GROWING COMPANIES

Montreal's Top Employers
2026

Global reach and financial strength



* Last twelve months, April 30, 2026

** On April 30, 2026

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



Our AI intelligence engine, unifying data from multiple sources to provide real-time forecasting, clear and usable insights and autonomous execution



Elite™

Our core supply chain platform, built to help organizations run complex, high-stakes operations with agility, clarity and confidence

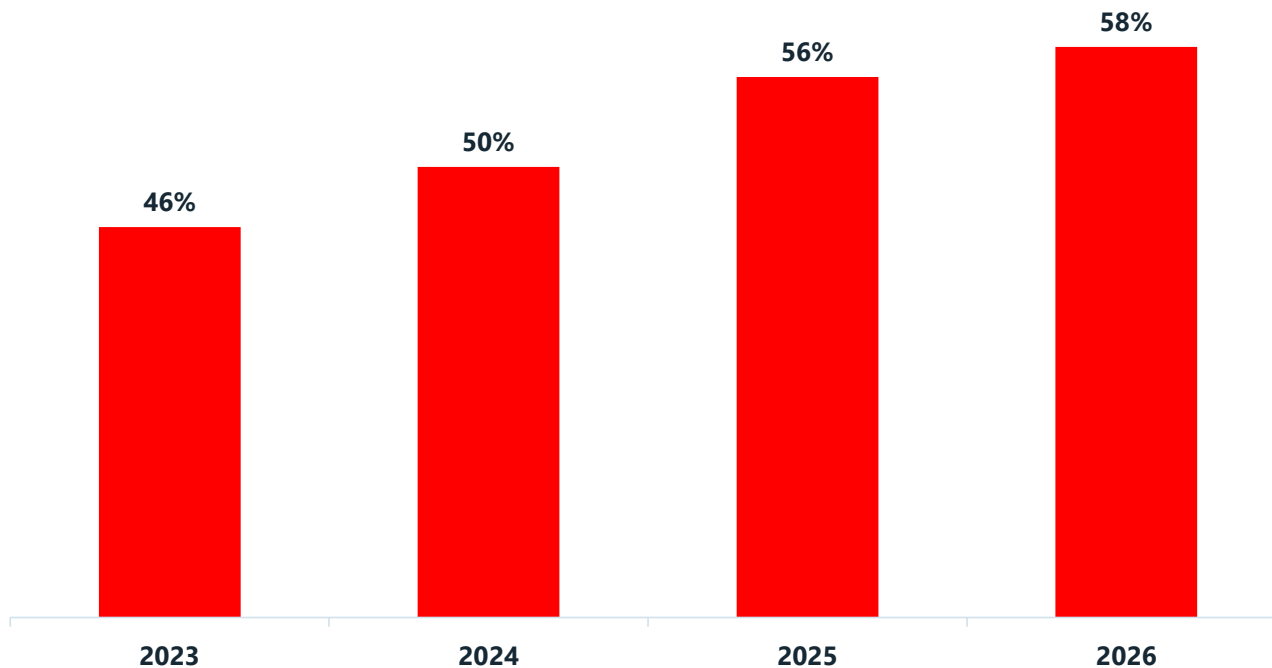


Our flexible, low-code capability, enabling organizations to customize, adapt and respond quickly, without modifying code



Recurring revenue evolution

Recurring revenue as a percentage of total revenue



SaaS growth driving recurring revenue to 58% of total revenue for the year ended April 30, 2026

Customers

Percentage of SaaS annual recurring revenue

81% | 19%

General distribution

Healthcare



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

Healthcare supply chains are stressed

- Point of use breakdowns
- Drug shortages dominate disruptions
- No real-time visibility across inventory and care settings

- Fragmented standardization and data-sharing across networks
- Dynamic regulatory requirements
- Extraordinary pressure on supply chains to deliver

Tecsys is an experienced leader in solving these issues across the healthcare environment - from pharmacies and hospitals to health systems and manufacturers.

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

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

ARR
opportunity
\$3B

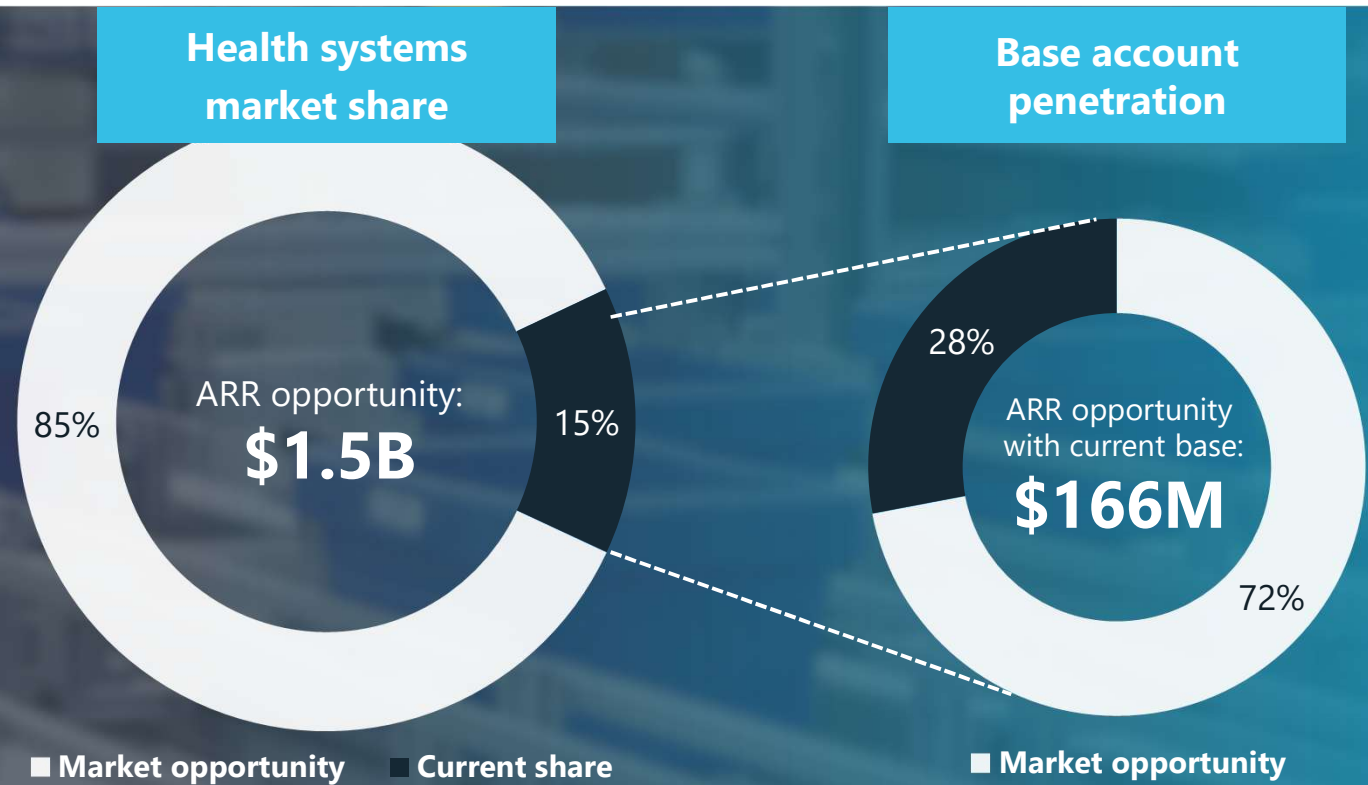
Western European market estimated at 60% of U.S./Canada market

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



Additional ARR from markets where we excel

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



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

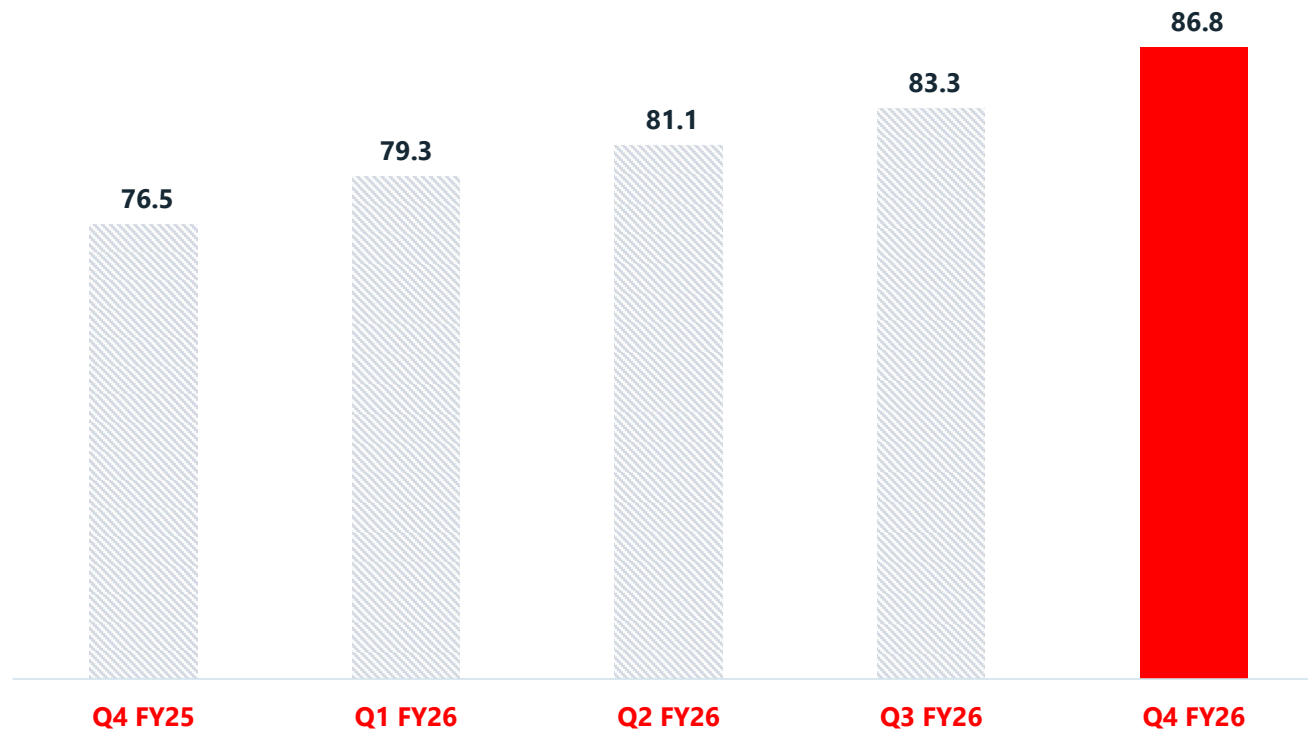
Partner influenced current sales pipeline

Q4 FY26: 24%



SaaS annual recurring revenue (ARR)¹ growth

in \$CAD millions



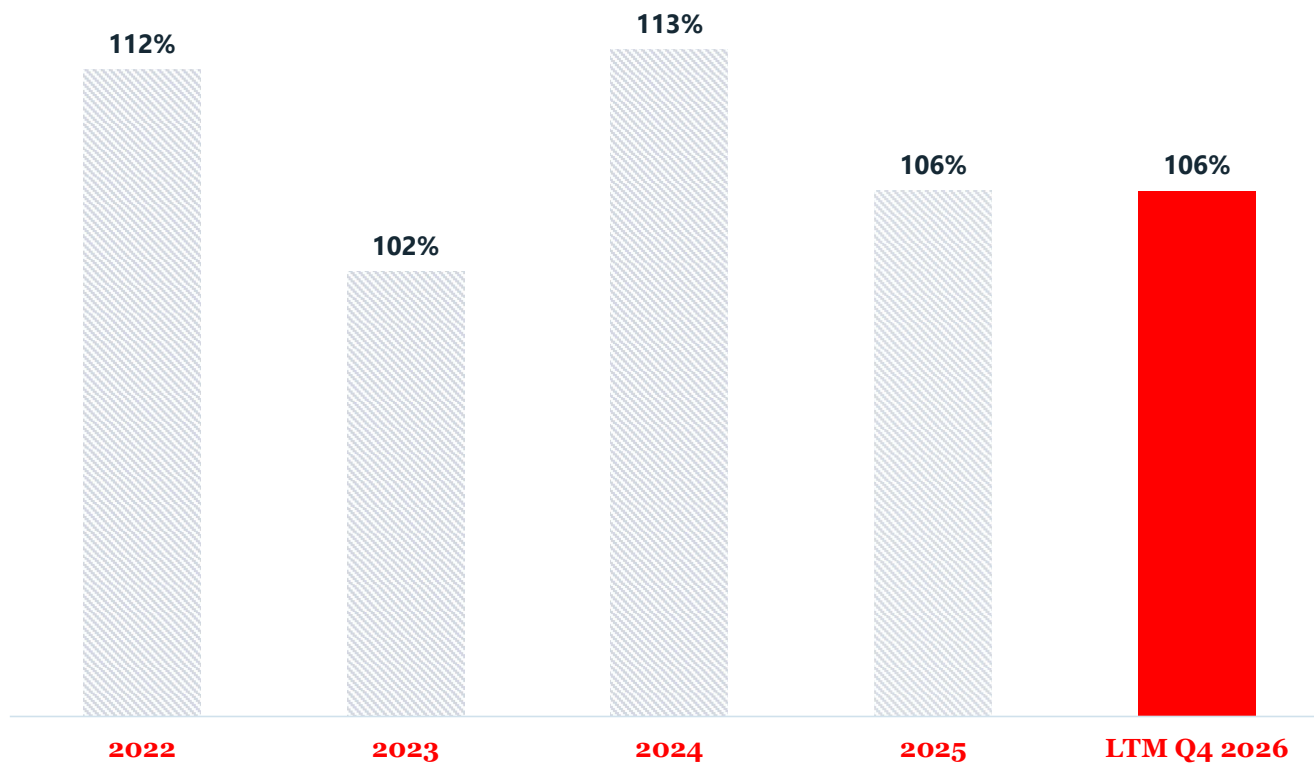
19%

**Q4 FY26 Elite™ SaaS
ARR² growth YoY
(21% on a constant
currency basis)**

13%

**Q4 FY26 SaaS ARR¹
growth YoY (15% on
a constant currency
basis)**

Elite™ SaaS ARR net retention rate



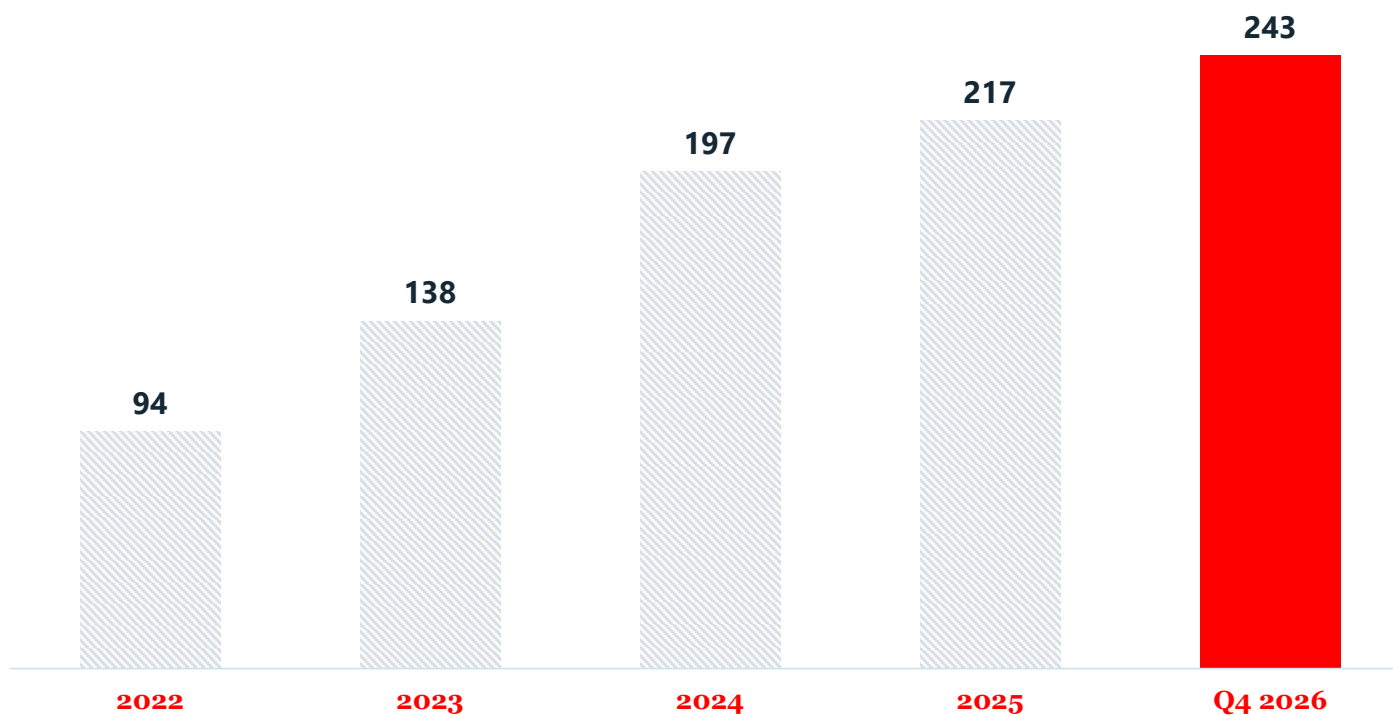
106%

**LTM Q4 2026
Elite™ SaaS ARR
net retention rate**

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

SaaS remaining performance obligation (RPO)¹

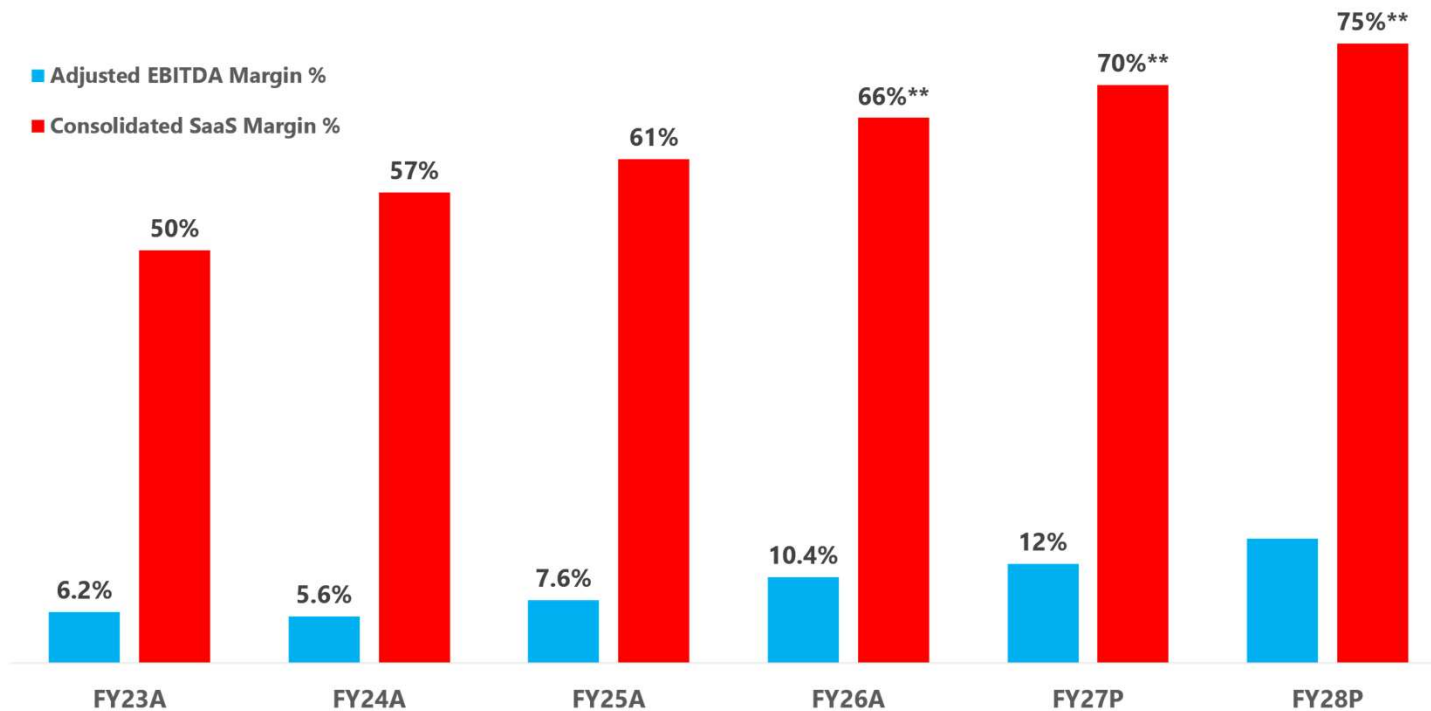
in \$CAD millions



12%

**Q4 FY26 SaaS RPO¹
YoY Growth (14% on
a constant currency
basis)**

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 FY27P represents guidance mid-point.
- AEBITDA FY28P is a directional target.

Financial highlights in \$CAD thousands except EPS

	Q4 2026		Q4 2025		Δ YoY		Q4 2026 TTM		Q4 2025 TTM		Δ YoY	
	\$	%	\$	%	\$	%	\$	%	\$	%	\$	%
SaaS Revenue	21,488	43%	18,375	39%	3,113	17%	80,412	42%	67,071	38%	13,341	20%
Maintenance and Support Revenue	7,383	15%	7,910	17%	(527)	-7%	30,694	16%	32,470	18%	(1,776)	-5%
Professional Services Revenue	15,792	32%	16,213	35%	(421)	-3%	63,807	33%	57,665	33%	6,142	11%
License Revenue	302	1%	294	1%	8	3%	1,079	1%	1,811	1%	(732)	-40%
Hardware Revenue	5,080	10%	3,763	8%	1,317	35%	17,150	9%	17,437	10%	(287)	-2%
Total Revenue	50,045	100%	46,555	100%	3,490	7%	193,142	100%	176,454	100%	16,688	9%
Cost of Revenue	24,020	48%	22,712	49%	1,308	6%	93,594	48%	91,161	52%	2,433	3%
Gross Profit	26,025	52%	23,843	51%	2,182	9%	99,548	52%	85,293	48%	14,255	17%
Sales & Marketing	9,493	19%	9,695	21%	(202)	-2%	39,538	20%	36,152	20%	3,386	9%
General and Administration	3,613	7%	3,373	7%	240	7%	14,541	8%	12,646	7%	1,895	15%
Research and Development	7,788	16%	7,665	16%	123	2%	33,064	17%	29,315	17%	3,749	13%
Restructuring Costs	4,652	9%	-	0%	4,652	n.m.*	4,652	2%	-	0%	4,652	n.m.
Operating Expenses	25,546	51%	20,733	45%	4,813	23%	91,795	48%	78,113	44%	13,682	18%
Profit from Operations	479	1%	3,110	7%	(2,631)	-85%	7,753	4%	7,180	4%	573	8%
Net (Loss) Profit	(224)	0%	1,710	4%	(1,934)	n.m.	4,038	2%	4,459	3%	(421)	-9%
Adjusted Net Profit**	3,195	6%	1,710	4%	1,485	87%	7,457	4%	4,459	3%	2,998	67%
Adjusted EBITDA**	6,731	13%	4,305	9%	2,426	56%	20,031	10%	13,373	8%	6,658	50%
EPS Basic	(0.02)		0.12		(0.14)	n.m.	0.27		0.30		(0.03)	-10%
EPS Diluted	(0.02)		0.11		(0.13)	n.m.	0.27		0.30		(0.03)	-10%
Adjusted diluted EPS**	0.21		0.11		0.10	91%	0.50		0.30		0.20	67%
SaaS ARR***							86,770		76,515		10,255	13%
SaaS RPO***							243,009		216,657		26,352	12%
Professional Services Backlog***							31,906		48,949		(17,043)	-35%

*The percentage change has been excluded as it is not meaningful.

**Refer to April 30, 2026, Management Discussion and Analysis "Non-IFRS Performance Measures".

***Refer to April 30, 2026, Management Discussion and Analysis "Key Performance Indicators".

Corporate overview

\$518M

Market cap**
14.4M S/O

TMX

Symbol TCS

35¢

Dividend per year*

16%

Insider ownership**

**Brokerage
coverage**

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

Reasons to invest

\$3B ARR TAM

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

20% SAAS REVENUE GROWTH

LTM April 30, 2026, YoY SaaS revenue growth of 20%

2.4X NTM EV/SALES

Trading at 2.4x NTM EV/sales, a 60% discount to its closest comparable MANH

Thank you.

The heartbeat of modern supply chains.
VISIBILITY. AGILITY. CONFIDENCE IN EVERY OUTCOME.

