

H1 2026 RESULTS

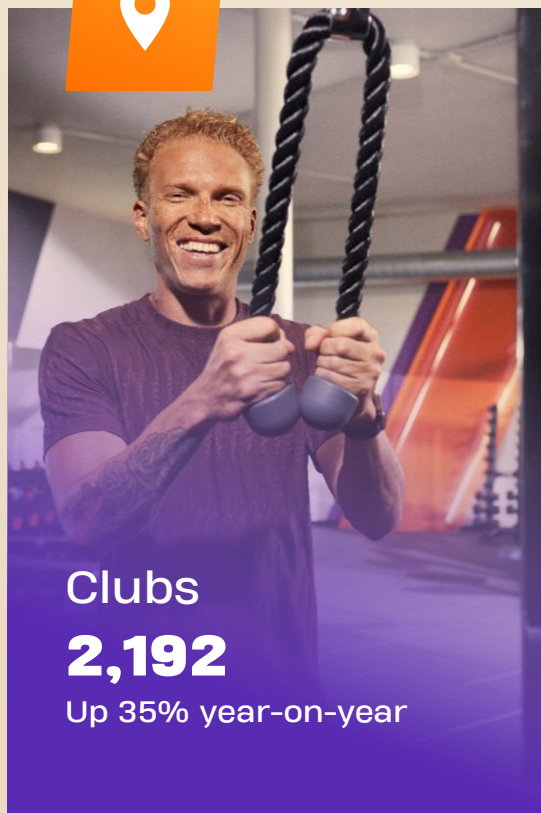
SPEAKERS: RENÉ MOOS (CEO) &
MAURICE DE KLEER (CFO)

28 JULY 2026



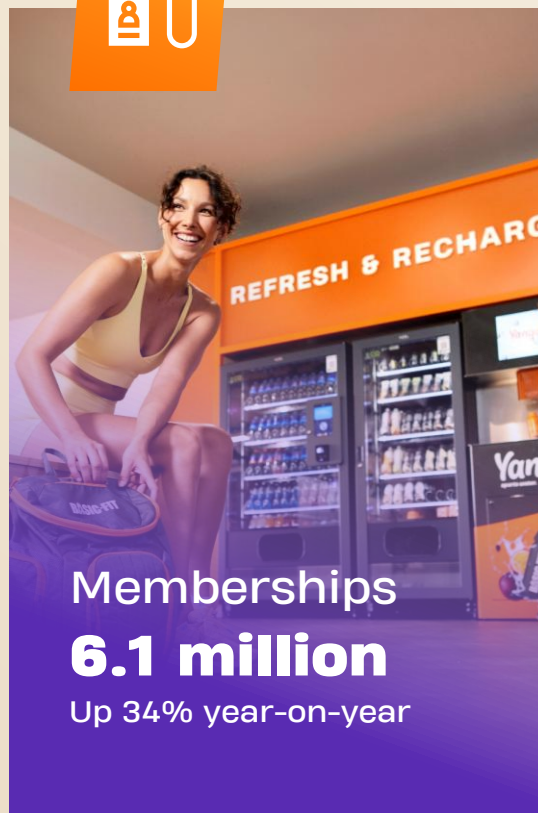
BASIC-FIT

GROUP HIGHLIGHTS H1 2026



Clubs
2,192

Up 35% year-on-year



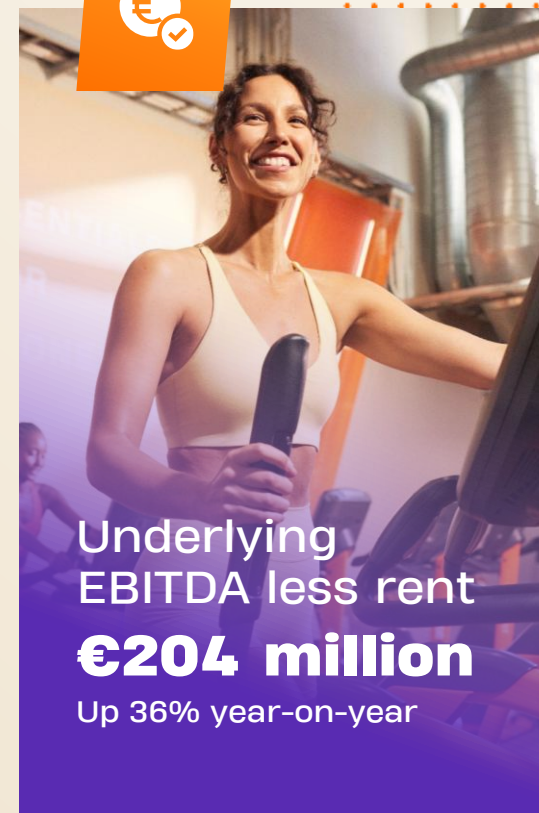
Memberships
6.1 million

Up 34% year-on-year



Revenue
€800 million

Up 18% year-on-year

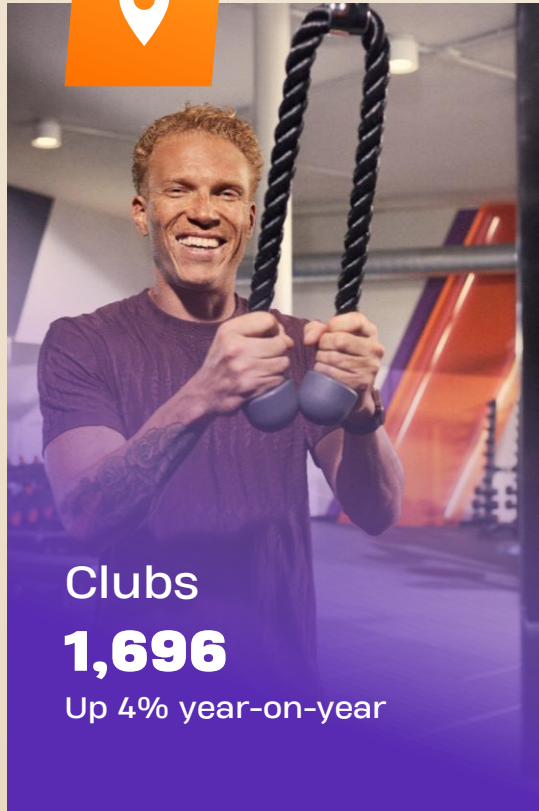


Underlying
EBITDA less rent
€204 million

Up 36% year-on-year

HIGHLIGHTS H1 2026

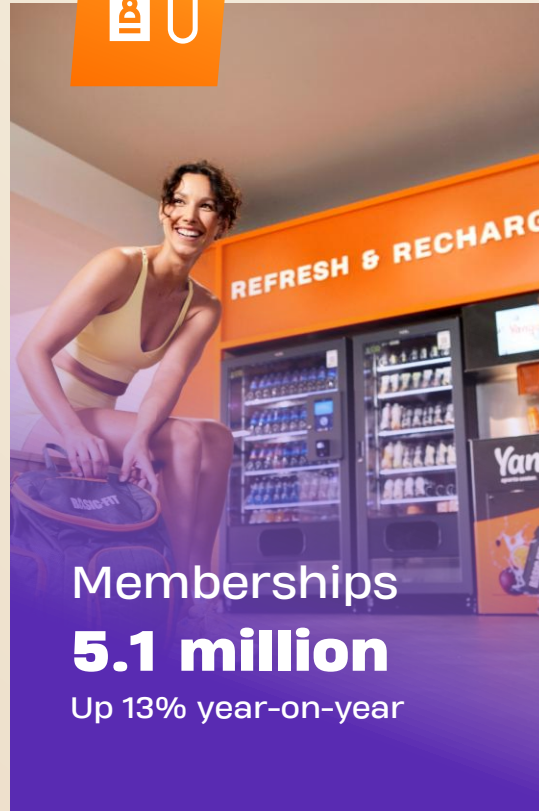
Basic-Fit branded owned clubs



Clubs

1,696

Up 4% year-on-year



Memberships

5.1 million

Up 13% year-on-year



Average members
per club

2,999

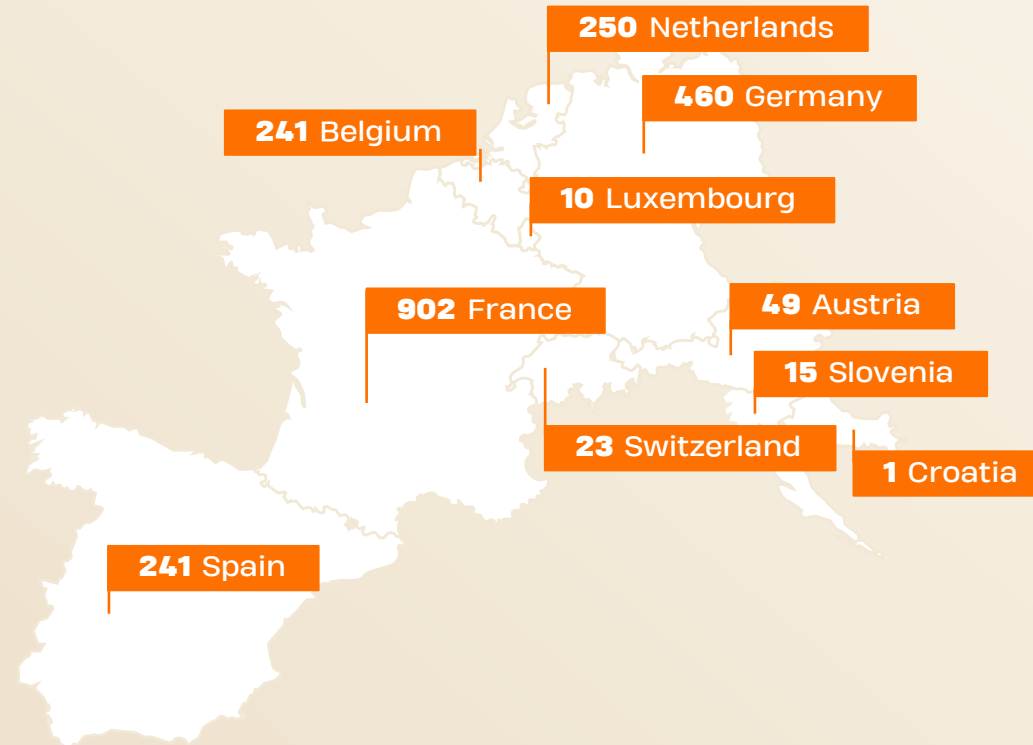
Up 8% year-on-year

BASIC-FIT

CLUB GROWTH ON TRACK

41 net openings in H1 2026

- 2,192 clubs compared with 2,151 at the end of 2025
 - Owned clubs: 1,751 clubs (+35 net growth)
 - Franchise clubs: 441 clubs (+6 net growth)
- Majority of club openings in growth countries: Germany (+16), Spain (+11) and France (+8)
- Discontinued franchise operations in Romania and Czech Republic to focus on market leadership in core markets

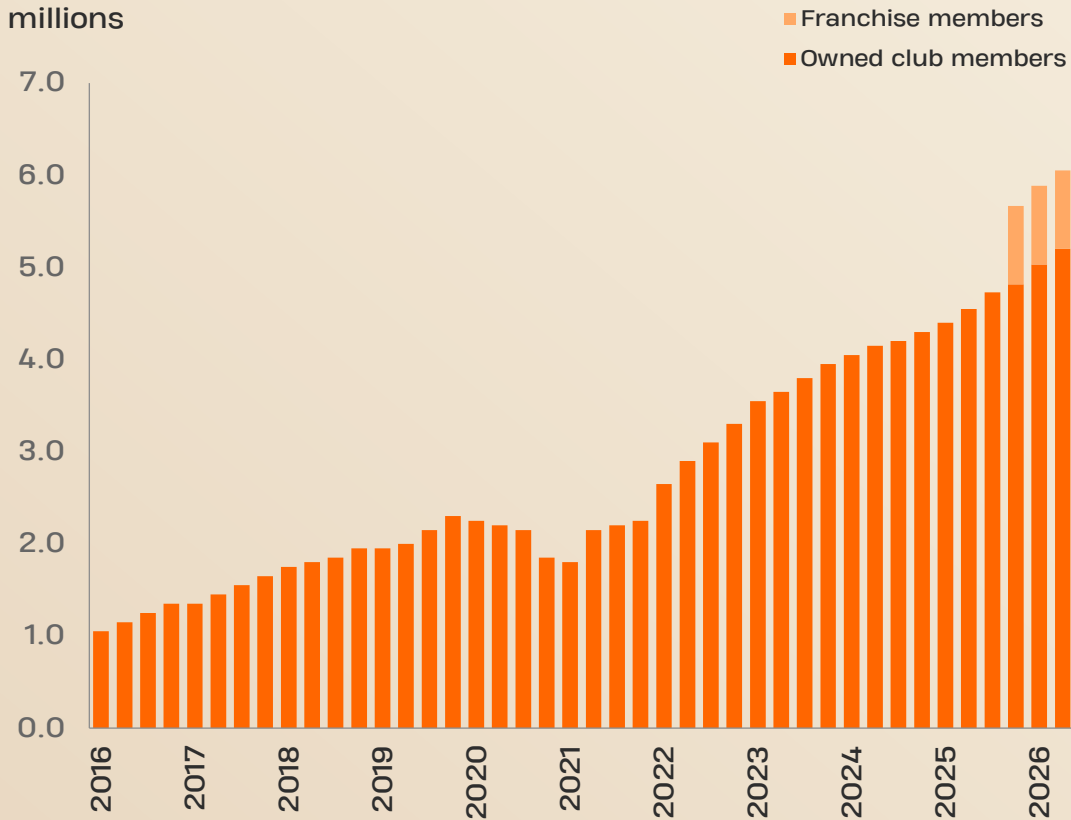


6.1 MILLION MEMBERSHIPS

34% YoY membership growth

Basic-Fit membership development 2016 to H1 2026

millions



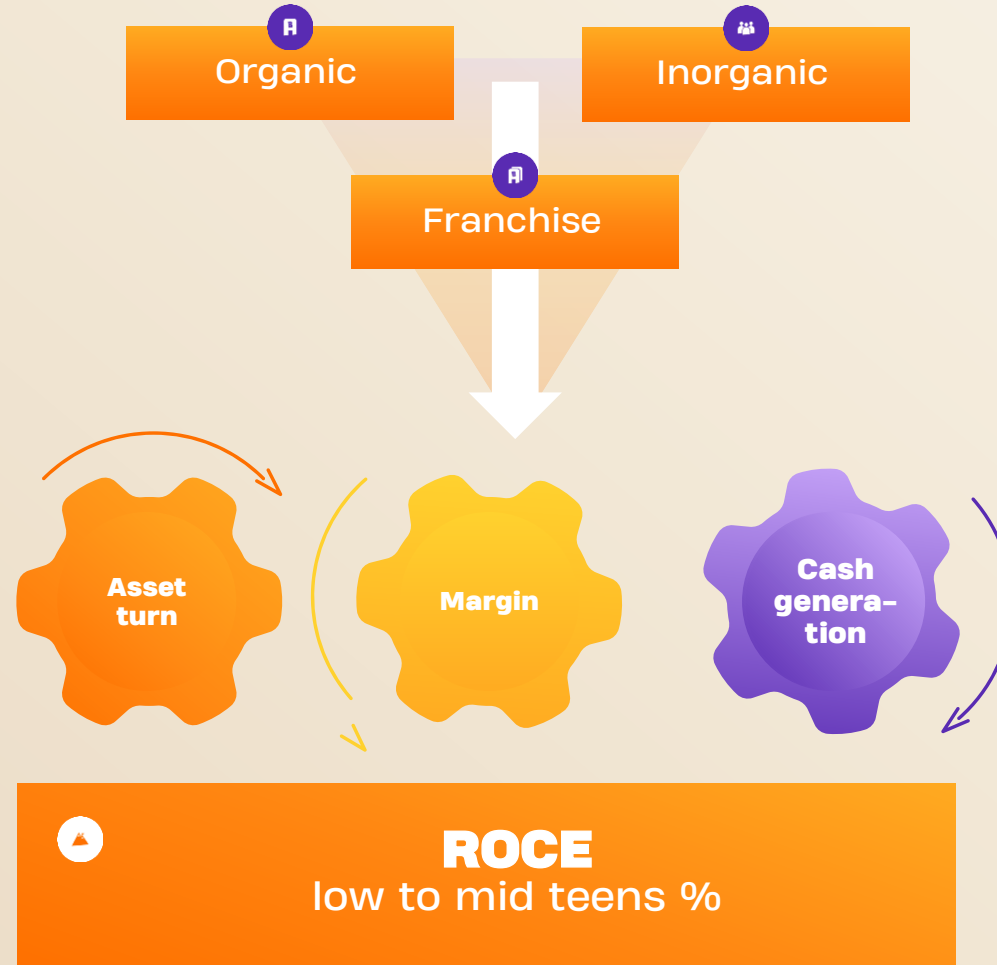
YoY membership base grew by 1.5m, driven by the Clever Fit acquisition and 576k membership growth at Basic-Fit clubs

Growth was recorded in all countries: strong performance in France and Spain

Membership base at Basic-Fit branded owned clubs grew by 269k in H1 2026, compared to 256k in H1 2025 and despite fewer openings

NEW ERA OF QUALITY GROWTH

Executing multi-vertical growth strategy



WELLYOU ACQUISITION – GERMANY

Bolt-on M&A accelerates Basic-Fit's path to critical mass in Germany

TRANSACTION HIGHLIGHTS

41 clubs

Owned clubs acquired, mainly Northern Germany

~110,000

Members across the acquired locations

€52 million

Purchase price* — 5.3x 2025 Club EBITDA, cash funded

Q3 2026

Expected closing, regulatory approval received

STRATEGIC FIT

- ▶ Expands Basic-Fit's German footprint from 74 to 115 owned clubs
- ▶ Rebranding wellyou accelerates Basic-Fit's path to ~200 branded clubs in Germany — the critical mass to build strong brand recognition and unlock national marketing campaigns
- ▶ A disciplined bolt-on acquisition, consistent with the multi-vertical growth strategy set out at CMD 2026

OWNED CLUB FOOTPRINT – GERMANY



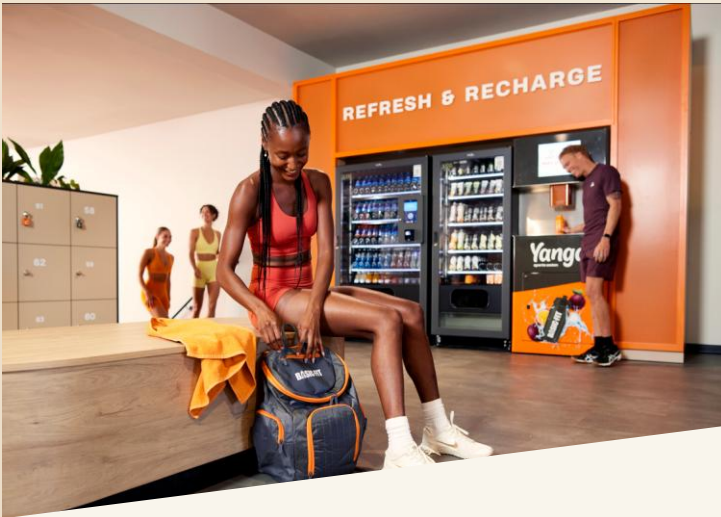
- Basic-Fit branded clubs
- Clever Fit branded owned clubs
- wellyou branded clubs

* The purchase price is on a debt-free, cash-free basis

NEW LOOK



AND NEW FEEL



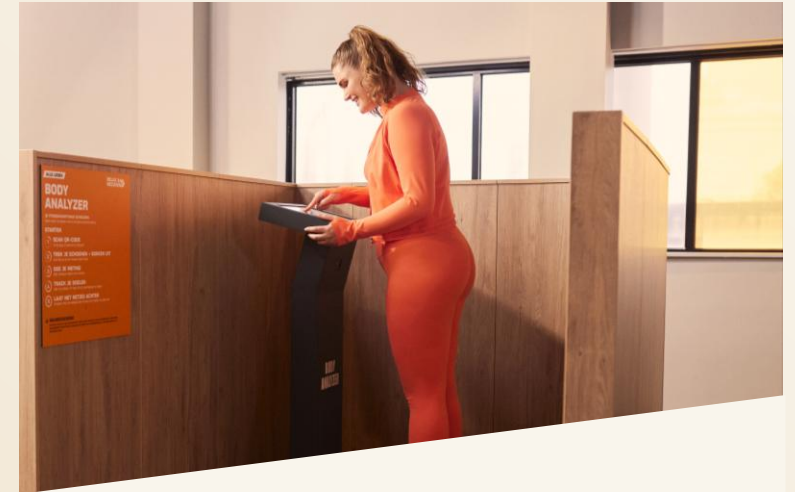
LONGER OPENING HOURS

- Further expanded broad opening hours in France, Germany & Spain
- Higher customer satisfaction
- Strong driver of member growth



IMPROVED PRODUCT

- Structural trend towards holistic wellbeing → expanding pilot Relax & Recover zones
- Fitness Races growing in popularity → Pilot Hybrid Training zones



IMPROVED SERVICES

- Growing importance of body composition measurement & tracking → Developed body Analyzer 2.0
- Habit building features launched in App

UPDATED OUTLOOK 2026*

CONTINUED STRONG GROWTH IN REVENUE
AND UNDERLYING EBITDA LESS RENT



Revenue between
€1.64 - €1.69 billion



Underlying EBITDA
less rent **€430 -
€460** million
(was €415 - €455 million)



**Significant
improvement** in
positive **free cash
flow**



Continued growth of
net 50 Basic-Fit
owned clubs

*Outlook includes Clever Fit owned clubs and franchise clubs.



BASIC-FIT

FINANCIALS

10 YEARS OF BEING LISTED

Celebrating the anniversary of the IPO

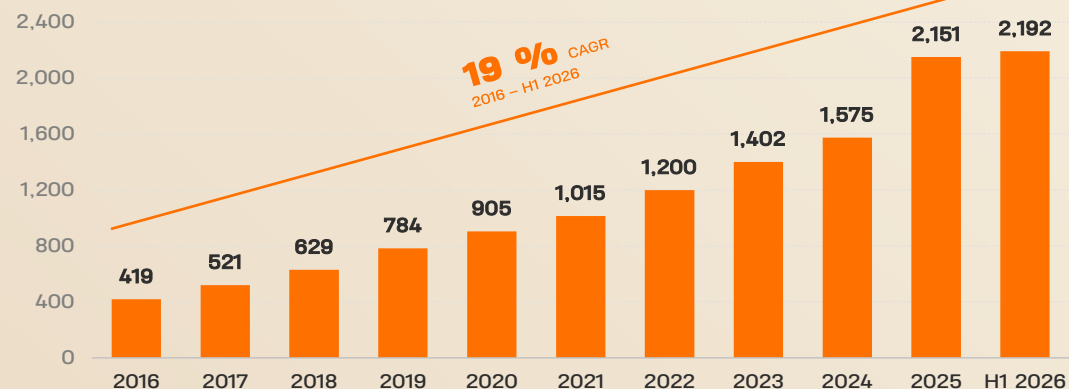


BASIC-FIT

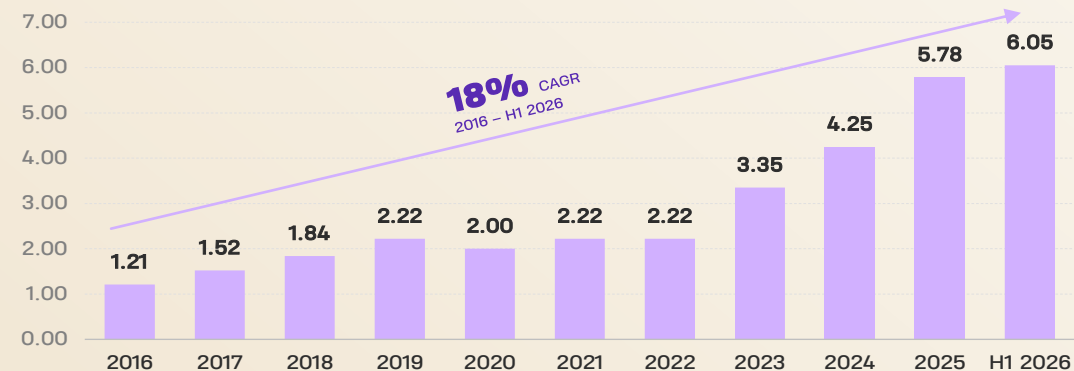
10 YEARS OF GROWTH

All KPI'S have double digit CAGRs between 2016 - H1 2026

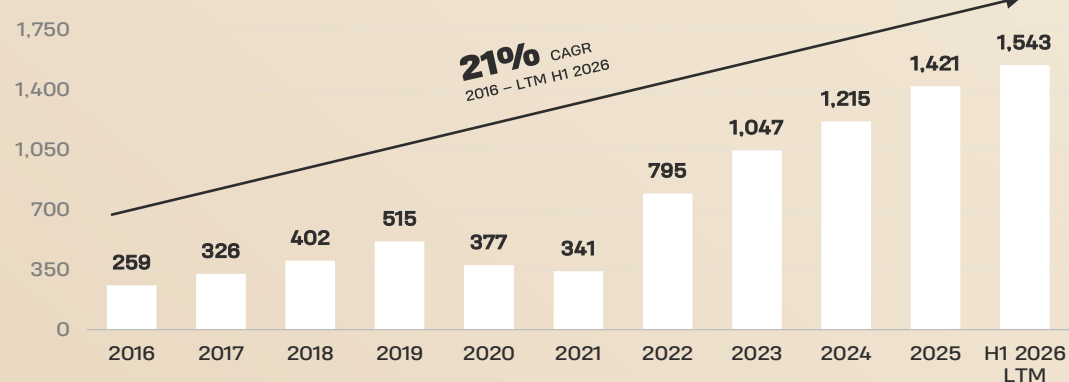
of clubs



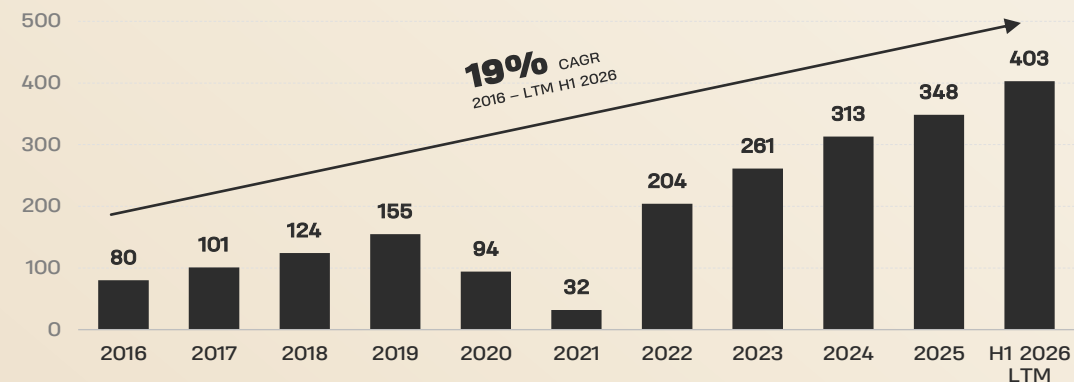
of memberships ('000s)



revenue (€ million)



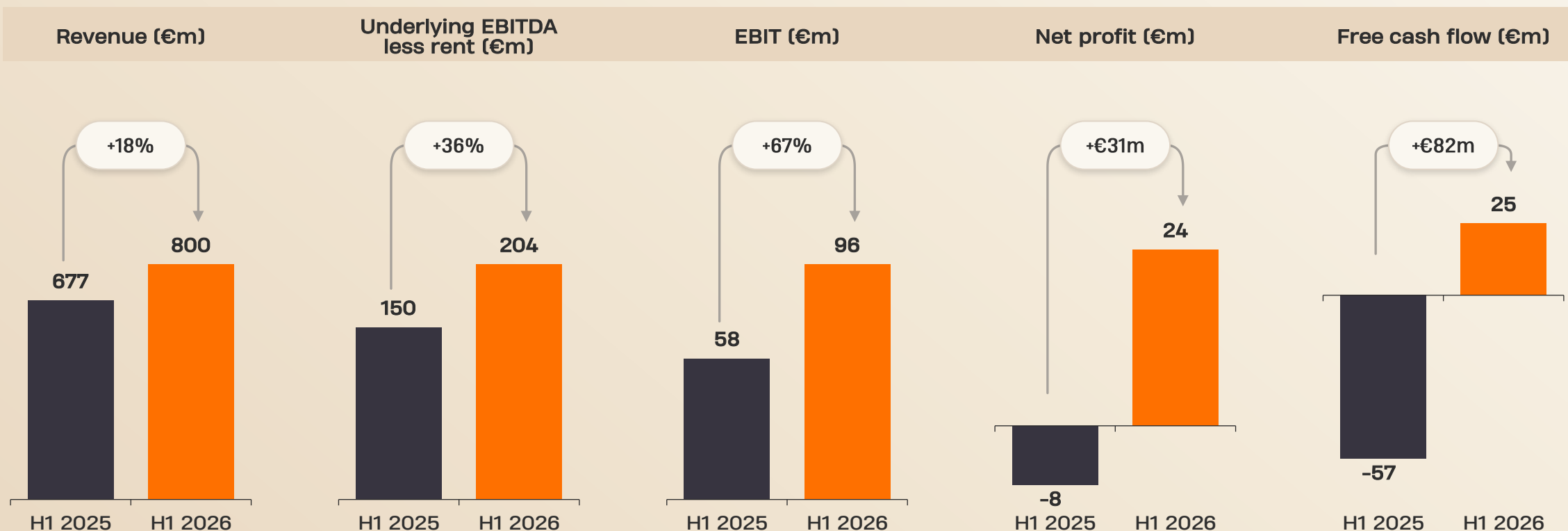
underlying EBITDA less rent* (€ millions)



Note: This overview includes Basic-Fit and Clever Fit owned and franchise metrics

FINANCIAL RESULTS

Key metrics vs prior year



CAPEX OVERVIEW



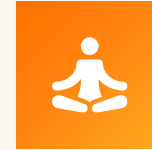
Expansion Capex

- Expansion capex of €39.6m in H1 2026
- €1.47 (H1 2025: €1.38m) spent on average per newly built club
- The increase in expansion capex reflects the increased size of new clubs and the investments in our new club design.



Maintenance Capex

- Maintenance capex of €54.4m in H1 2026
- €31k per club for the first half year of 2026 (H1 2025: €36k)
- We expect FY 2026 maintenance capex of approximately €60k per club

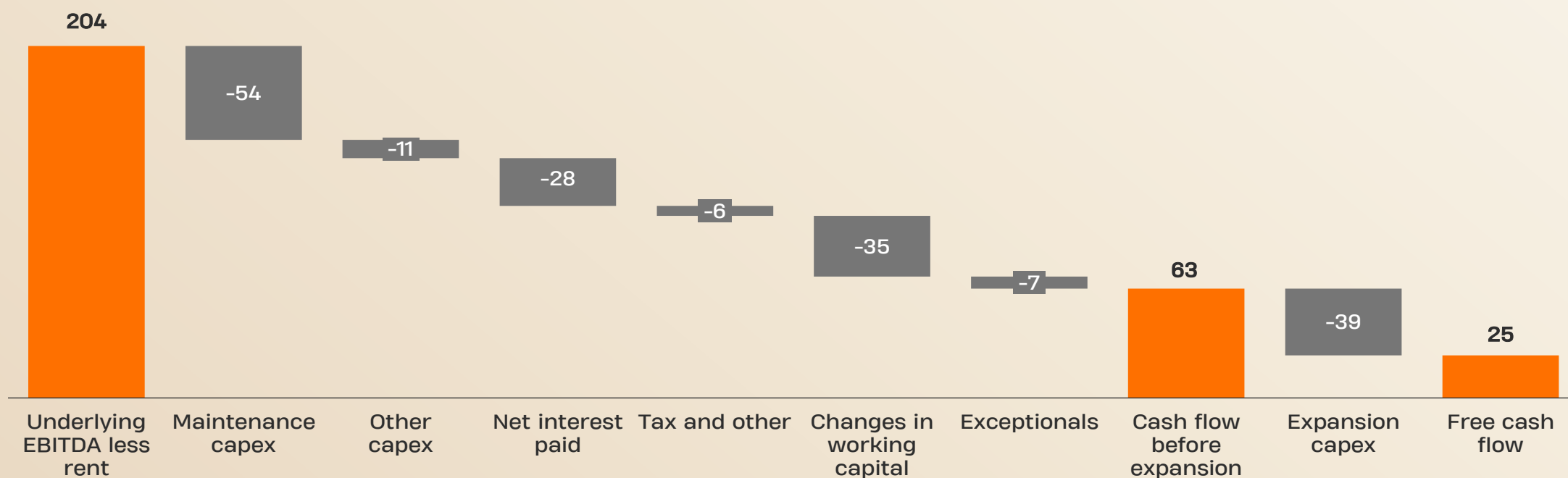


Other Capex

- Other capex of €10.7m (H1 2025: €9.3m)
- This includes investments in innovations, sustainability programmes and software development
- We expect FY 2026 other capex of approximately €25 million (FY 2025: €30 million)

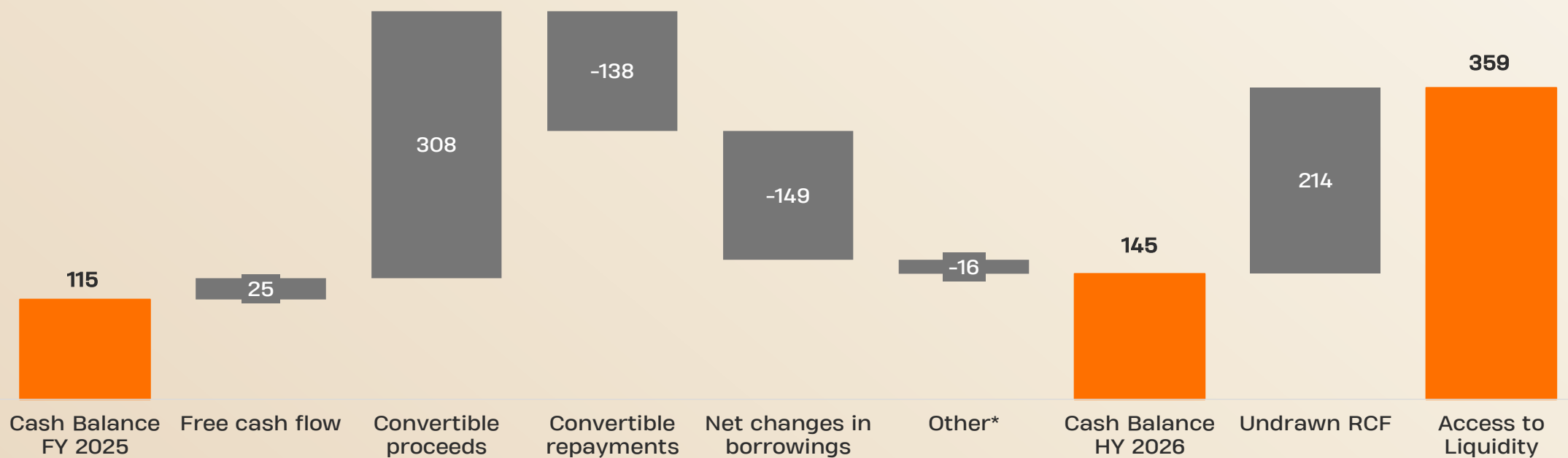
FREE CASH FLOW

Bridge from Underlying EBITDA less rent to free cash flow in H1 2026 (€m)



ACCESS TO LIQUIDITY OF €359MILLION

Bridging the cash balance from FY 2025 to H1 2026 (€m)



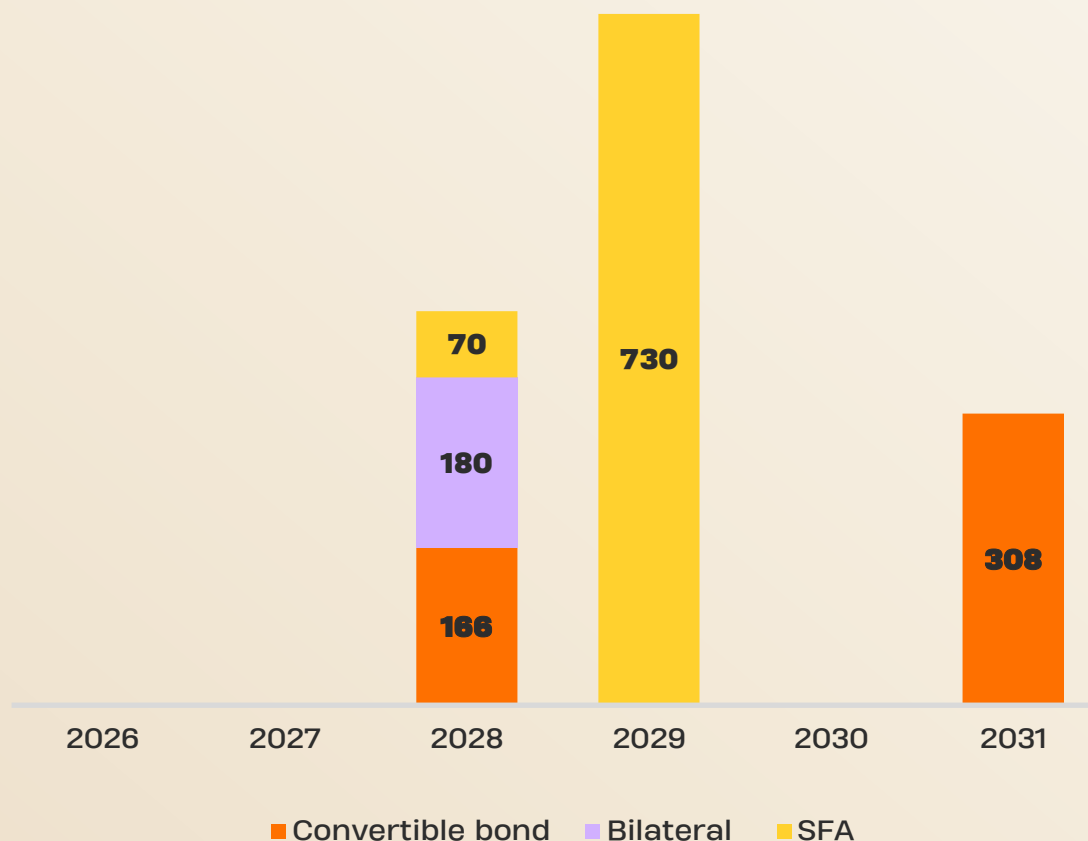
WELL FINANCED TO MEET FUTURE DEBT OBLIGATIONS

Future debt maturity (€m)

New €308 million CB to mature in 2031; replacing more expensive short term bank facilities

Financial flexibility to execute multi-vertical growth strategy

Main bank facility to mature in 2029



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BASIC-FIT

» THANK YOU!

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