

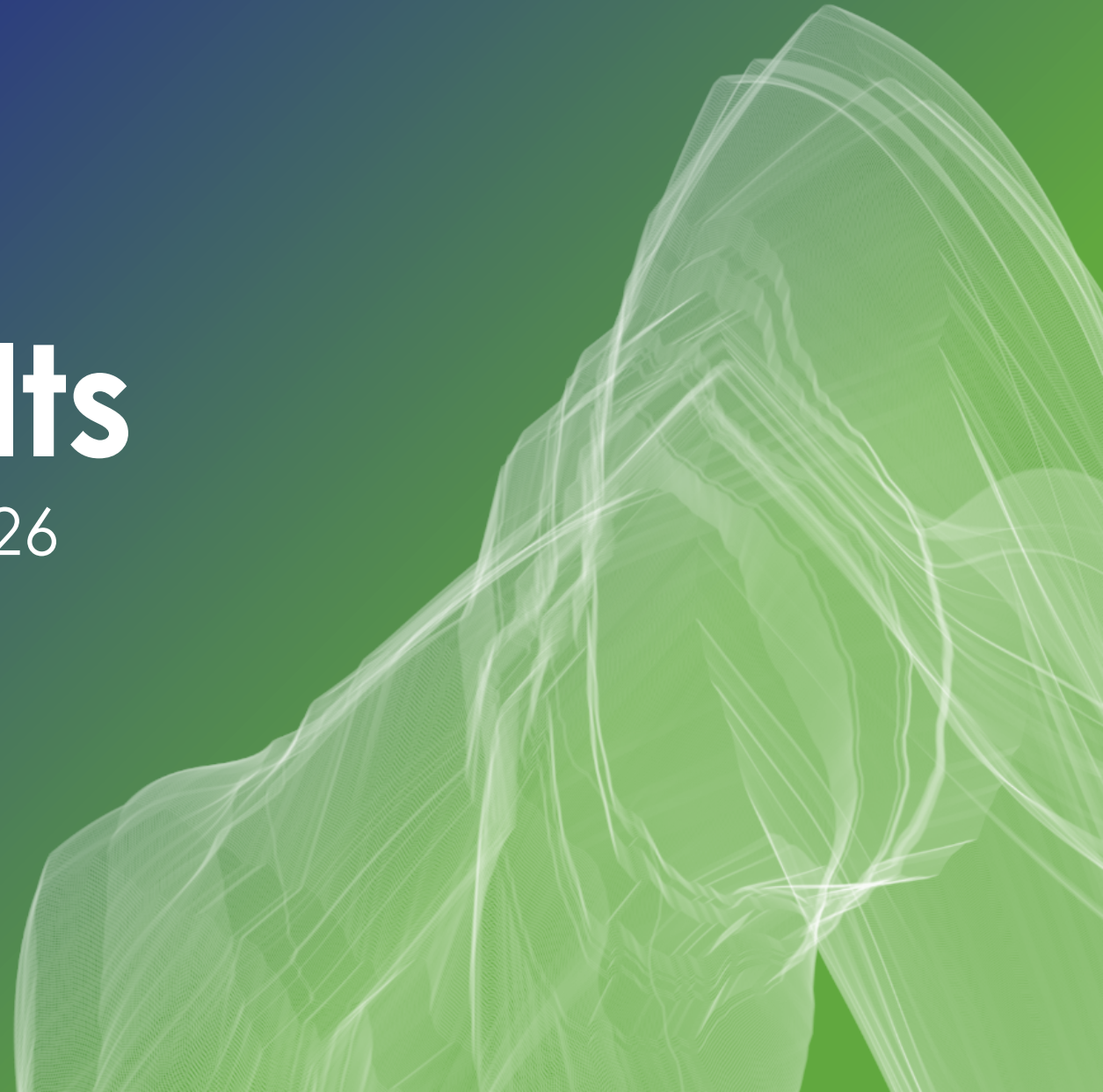


Full Year Results

12 months ended 31st March 2026

Brendan Mooney (CEO)
Richard McCann (CFO)

18 May 2026



Safe harbour statement

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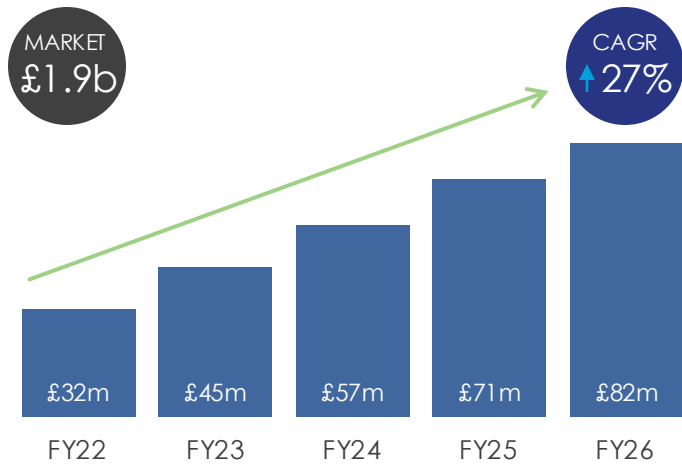
For more information visit
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Our Business

Business Overview

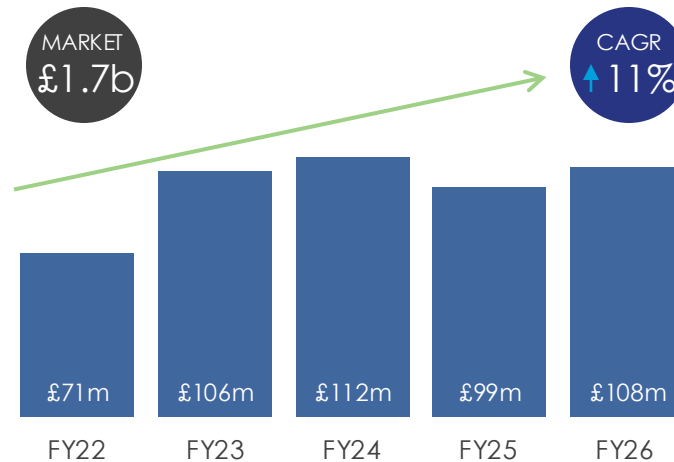
We have established positions in long-term, growing markets



Workday Products

We **develop software products** that complement Workday's comprehensive SaaS platform

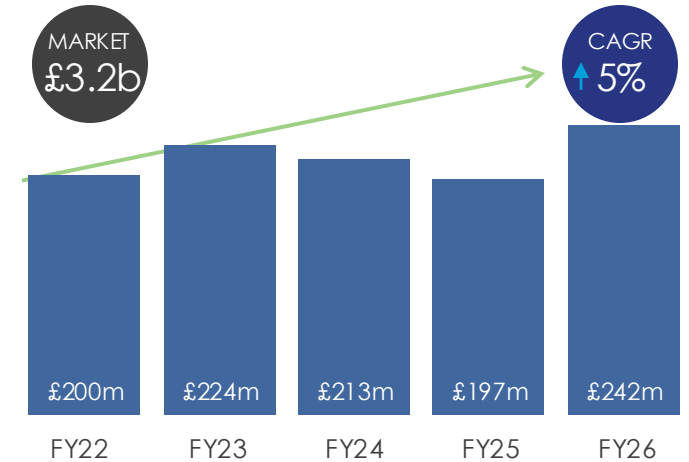
Our five products - **Employee Document Management, Pay Transparency, Smart Test, Smart Audit and Smart Shield** - safeguard and extend the capabilities of Workday systems for **c.700 global customers**



Workday Services

We are one of Workday's **leading services partners**, accredited to deploy their Finance, HR and Planning products to clients in Europe and North America

We are trusted by customers to deliver **complex deployments and integrations**, and to evolve their Workday systems over time



Digital Services

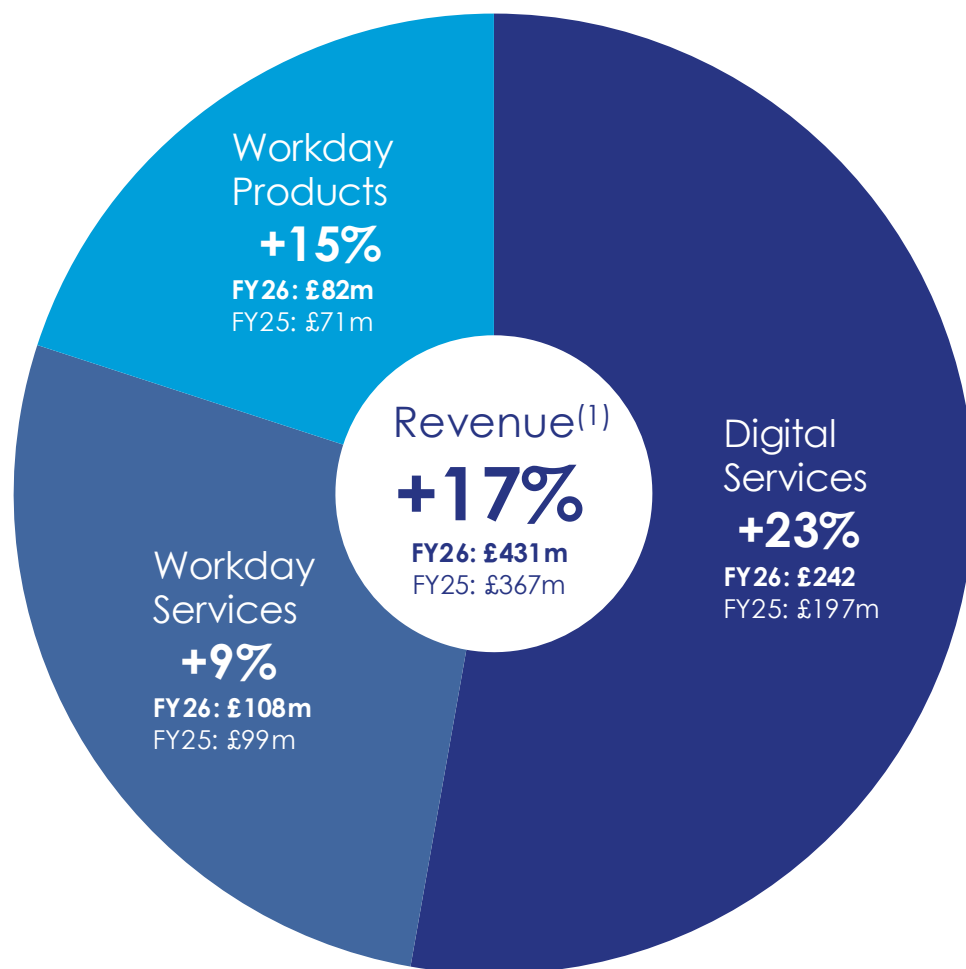
We **design, build and run** digital services for public sector, healthcare and commercial customers, with the UK as our largest market and **international expansion underway**

Our **AI and Cloud-led** services deliver outcomes that are **secure, accessible and cost-effective**

Expertise at a Global Scale

FY26 Highlights



Strong growth with record revenue, bookings and contracted backlog, maintaining momentum into FY27

- **Short-term use of contractors and supply partners** to support **growth** has moderated **margins**
- **Strong ARR growth** keeps us on track for **£100m target**
- **AI revenue of £46m**, 19% of Digital Services revenue

Adjusted Profit⁽²⁾
 **+2%**
FY26: £67m
FY25: £66m

Bookings
 **+32%**
FY26: £505m
FY25: £382m

Dividend
 **+4%**
FY26: 29.6p per share
FY25: 28.4p per share

ARR⁽³⁾
 **+23%**
FY26: £89m
FY25: £73m

Backlog
 **+18%**
FY26: £434m
FY25: £368m

Cash Returned
 **£90m**
From 11 November 2024
to 15 May 2026

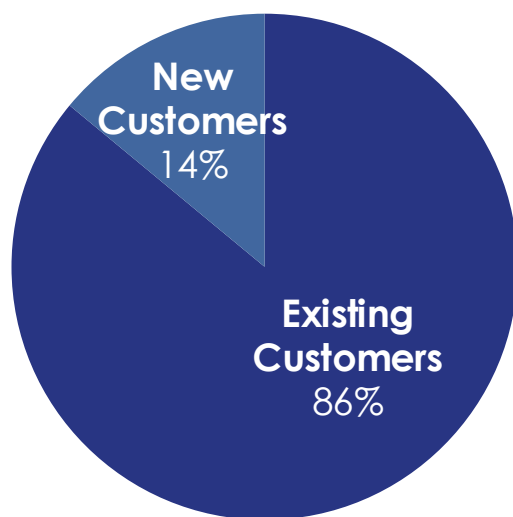
⁽¹⁾ In constant currency, total revenue growth is +19%; by division: Digital Services +23%, Workday Services +12% and Workday Products +19%

⁽²⁾ In constant currency, adjusted profit increase is +5%.

⁽³⁾ In constant currency, ARR growth is +24%

Our Customers

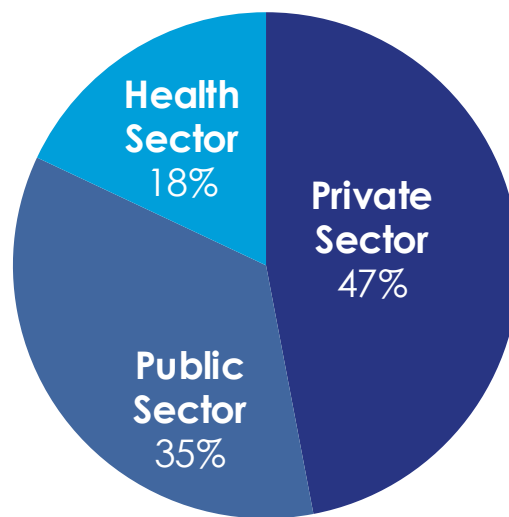
Established customer base, diversified by sector and growing internationally



High customer satisfaction

Customer satisfaction remains 'excellent'⁽¹⁾ (NPS of 61), driving long-term relationships and 86% of revenue from existing customers

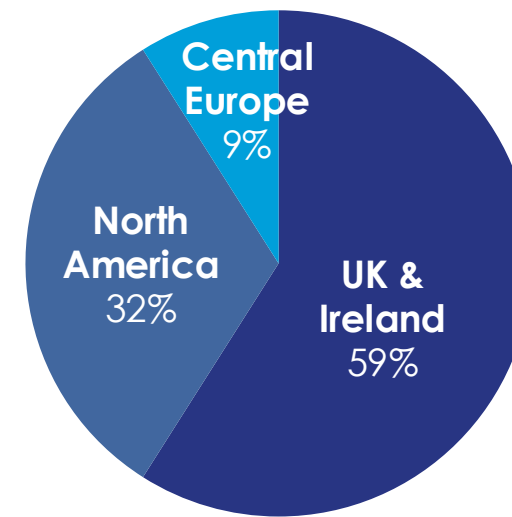
Added 150+ clients - **creates future multi-year revenue** opportunities



Balanced sector coverage

Private sector accounts for 47% of revenue, **public sector** 35% and **healthcare** 18%

1,250+ customers across these sectors create a diversified, resilient revenue base



Strong global footprint

International customers generated £177m, representing **41% of total revenue**

Growth in all regions:

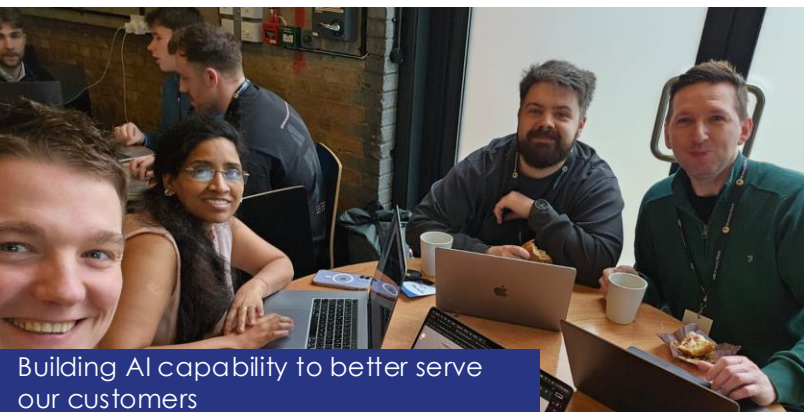
- UK: **+17%**
- North America: **+20%**
- Central Europe⁽²⁾: **+11%**

⁽¹⁾ Net Promoter Score (NPS). Bain & Co, the creators of the metric, defined that a score above 0 is good; 20+ is favourable; 50+ is excellent and 80+ is world class

⁽²⁾ Central Europe includes revenue for Rest of World (c.£5m/year); it excludes revenues generated in Ireland

Our People

We are building an exceptionally talented and engaged workforce



Building AI capability to better serve our customers



Developing early careers talent to support our future growth

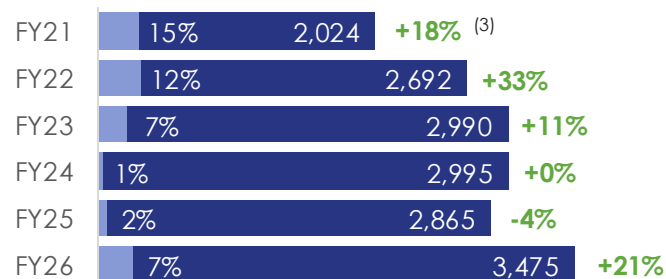


Community impact, driven by our people

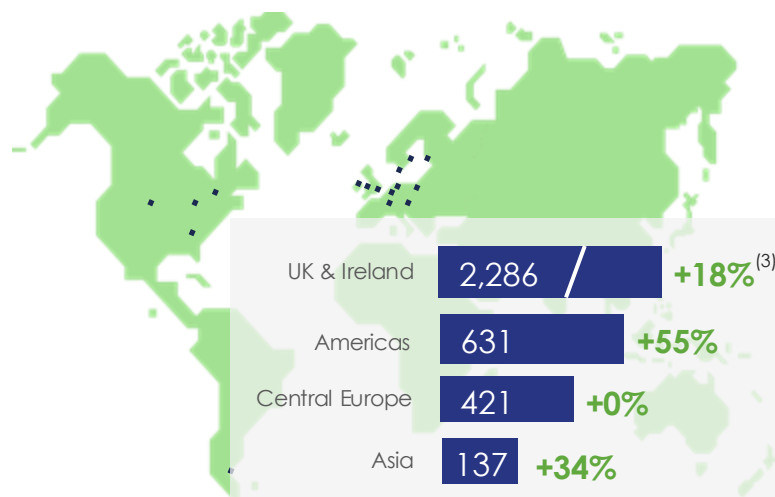
People

3,475

■ Contractors⁽¹⁾ ■ All Staff⁽²⁾



17 Global Locations



Engagement

90%

Employee Retention

77%

Peakon
Employee engagement

#30

FT FINANCIAL TIMES
statista
BEST EMPLOYERS
UK 2026

78%

'GLASSDOOR'
employee approval rating

⁽¹⁾ Contractors as a percentage of total staff numbers; bar represents actual number of contractors

⁽²⁾ Total staff numbers, inclusive of contractors

⁽³⁾ The percentages represent the change in staff numbers from the previous year

Our Responsibilities

Being responsible towards our people, customers, communities and planet



Product colleagues taking action to protect green spaces and biodiversity



Davis Pier colleagues helping to prepare home-cooked meals for families with seriously ill children



Inspiring the next generation of technology leaders through our outreach programmes



Climate Action

Reducing our climate impact

Achieved near-term net zero targets – on schedule, through green energy and internal reductions

New HQ build is underway, designed to BREEAM Outstanding, **the highest sustainability standard** for water and low-carbon performance



Reduced inequalities

Removing barriers and widening access to opportunity

Improved representation and progression, with **women making up 37% of colleagues globally** (FY25: 36%)

Through our Network Groups and **Disability Confident Leader** status, we improved pathways into Kainos for people with disabilities and long-term conditions



Quality Education

Building current and future digital talent

Since 2015, we have **engaged 14,000+ young people** through our outreach activities (2025: 12,500+)

We prioritised early careers, welcoming 129 young people this year (2025: 121), including 13 to our award-winning **Earn as Your Learn (EAYL) programme**

Divisional Performance

Workday Products

Strong ARR growth driven by full product portfolio; **Workday 'Clear Skies'** partner programme **increases opportunity scope**

ARR growth underpins £100m target

Won 100+ clients, expanded in 85+ existing clients

Senior team strengthened to drive £200m target

New divisional leader joins in June, with Marketing, Product, Customer Success and Revenue leaders already recruited

PTA: 30+ customers added through Workday resell

Legislative slippage in some EU countries extending opportunity window into 2028

Continued growth investment: +16% to £37m

R&D investment **+11% to £19m** (fully expensed)

Sales investment **+21% to £19m**⁽³⁾

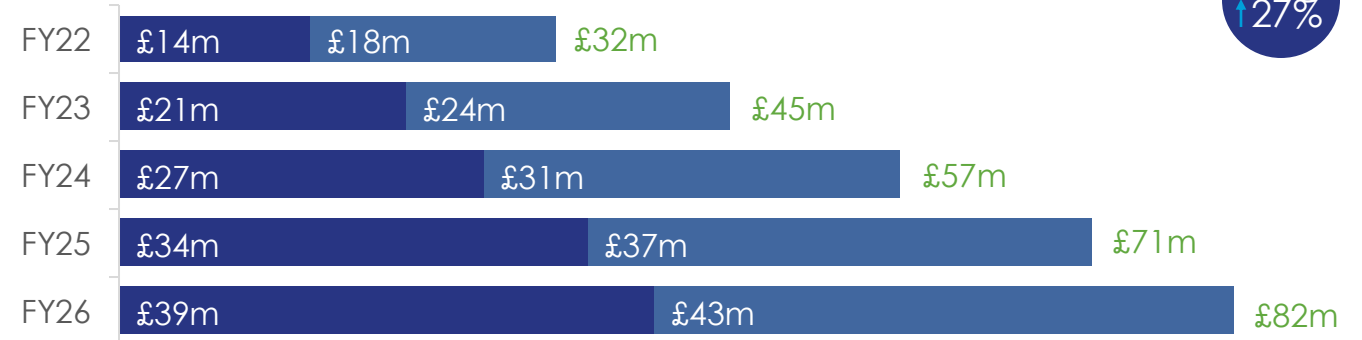
⁽¹⁾ In constant currency, Revenue grew 19%, ARR grew 24%

⁽²⁾ Five year CAGR, FY22 to FY26

⁽³⁾ Includes £2.3m of additional costs associated with the Built on Workday partnership



Revenue trend H1 / H2



Market size

£1.9bn

Estimated FY27 addressable global market

Smart product suite (£1,000m)

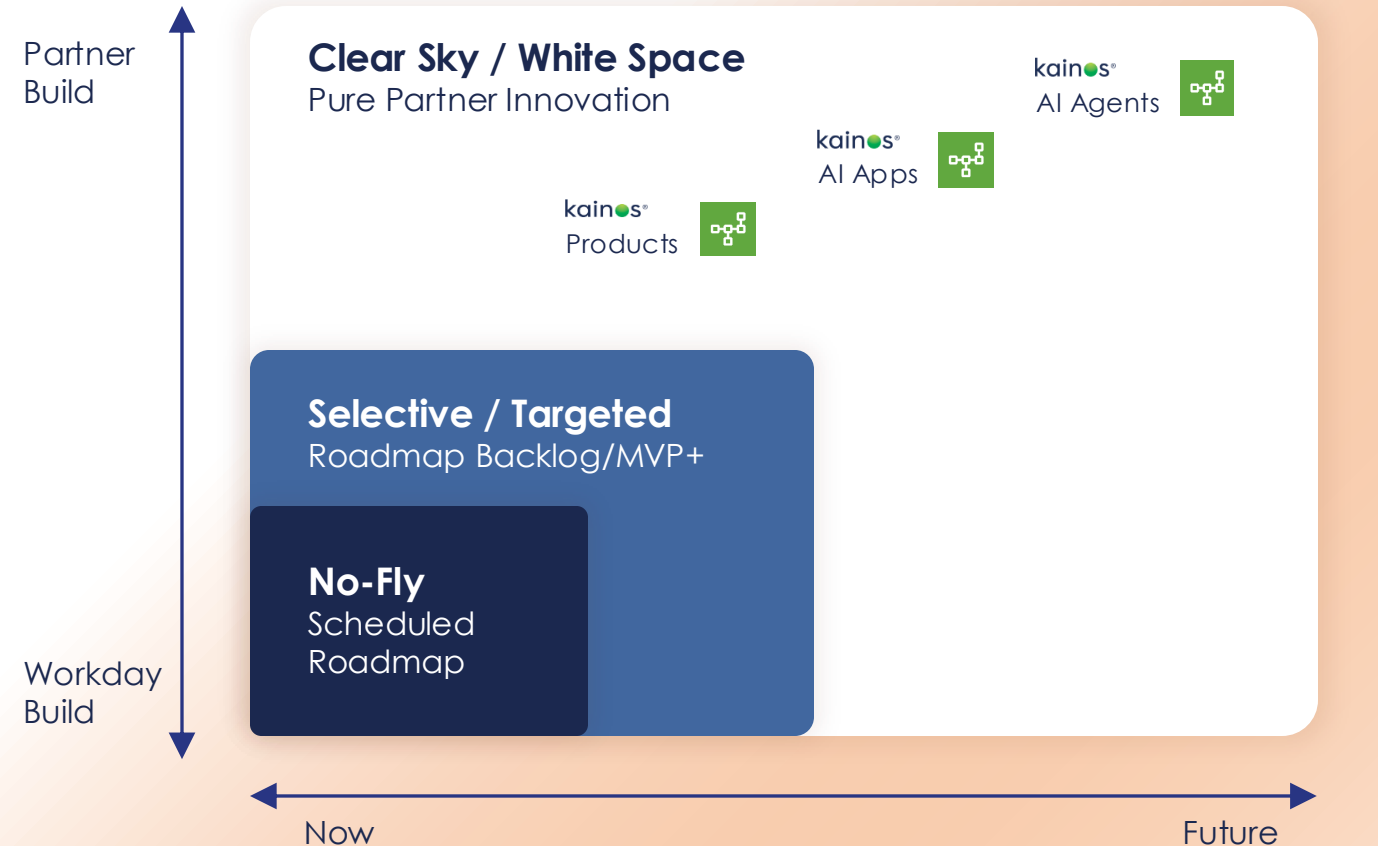
Employee Document Management (£600m)

Pay Transparency (£300m) (new)

(FY26: £1.6bn)

Clear Skies

- Workday identifies opportunities to enhance its platform
- Ideas that Workday chooses not to pursue are made available to selected partners like Kainos
- Selected partners are empowered to innovate and deliver value in areas of white space – new apps, products and AI agents - to address unmet customer needs
- Kainos is one of five partners chosen for Workday's Agent System of Record (ASOR), highlighting our leadership in this space



Source: Workday



Innovation Pipeline



● Kainos generated
 ● Workday sourced
 ● Agentic versions of existing Kainos products

Skyscanner takes off with Kainos Smart Suite

"Before Smart Test, manual testing of Workday updates took six weeks. Now it takes six hours, with greater accuracy, broader coverage, and zero disruption"

Matt Fleming | **Finance Systems Manager at Skyscanner**



Improved **compliance and risk reduction**, removing reliance on external testers



Supports continued **global expansion** without cost growth



Highly scalable operating model, **increasing team productivity**

Skyscanner is a world leader in travel, with 160 million users across 30 markets every month. As the organisation scaled internationally, it needed to protect financial controls, reduce operational risk and maintain pace - without increasing cost or headcount.

With **Kainos Smart Test, Smart Audit and Smart Shield**, Skyscanner now has the automation to reduce operational effort by 97%, resulting in execution going from weeks to hours, freeing the lean team to focus on strategic system development and high-priority outputs.

Workday Services

Return to growth driven by **record bookings**;
H2-weighted bookings
underpin FY27

Focus on complex deployments delivers high-quality bookings

20+ \$multi-million+ contracts signed, double FY25

Increase in more predictable, resilient revenue

Fixed-fee engagements now 37% of revenue, up from 30%; annuity-style arrangements increasing

Own-product consulting: accelerating opportunity

Consulting on Pay Transparency and Employee Document Management **to double in FY27**

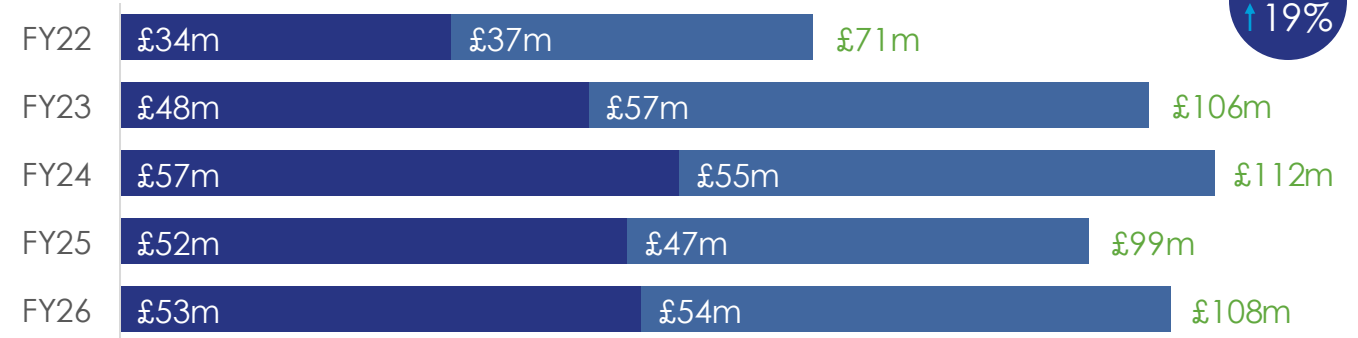
Workday AI Centre of Excellence established

Drives **customer AI adoption**; identifies **agentic revenue** opportunities for Kainos



Revenue trend

H1 / H2



CAGR⁽³⁾
↑19%

Market size
£1.7bn

Estimated FY27 addressable global market

Phase 1

Phase X

App Managed Services

(FY26: £1.7bn)

⁽¹⁾ In constant currency, growth is 12%.

⁽²⁾ Includes EDM Consulting revenues of £3.1m now reported in Workday Services; in FY25 £1.5m was reported in Workday Products revenue

⁽³⁾ Five year CAGR, FY21 to FY25

Global Payroll Transformation & Optimisation



"We needed an implementation partner with a strong regional footprint who could truly understand what EMEA meant for our global footprint,"

Global Payroll Director | Trimble

Trimble, a global tech firm with **12,000+ employees in 40+ countries**, faced payroll and time management challenges due to fragmented systems and manual processes.

To support its "Connect and Scale" strategy, Trimble teamed with Kainos to implement Workday as **a centralised HR and payroll platform**, automating tasks and providing real-time, accurate data.

Deployed across **47 countries**, the solution standardised global processes while ensuring compliance with **local regulations**. Workday's flexibility and Kainos' expertise improved governance, efficiency, and decision-making, laying a scalable foundation for future AI and automation.

Digital Services

Strong sales execution drives record revenue, bookings, backlog; record backlog underpins FY27

Revenue +23%, with H2 accelerating +33% on H1
Public: £136m (+11%) | **Canada:** £20m⁽³⁾ (+126%)
Health: £75m (+55%) | **Commercial:** £11m (-41%)

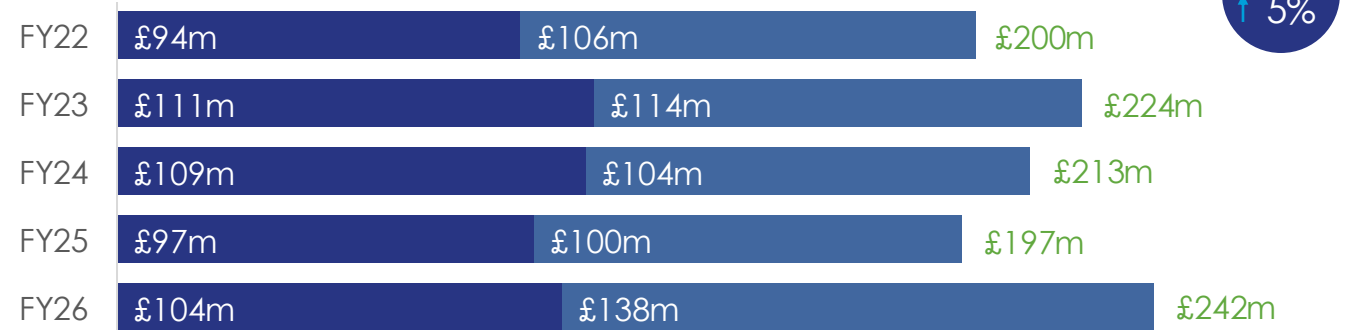
Public and Health sectors: demand stabilising
Departments signing larger, multi-year contracts, often under a single prime contractor

Increase in more predictable, resilient revenue
Fixed-price projects now 20% of revenue, from 14%

Canada
Kainos and Davis Pier teams are now fully integrated; the pace of the business remains strong



Revenue trend H1 | H2



Market size

£3.2bn

Actual FY26 digital spend in UK public sector, NHS
Central Government: £1,854m
Defence: £828m
Police: £148m
Health: £372m
(FY25: £3.2bn)

⁽¹⁾ In constant currency, growth is +23%.

⁽²⁾ Five-year CAGR, FY22 to FY26.

⁽³⁾ Revenue growth, excluding Davis Pier revenues is 75%

Digital Services

Bookings and backlog:
considering move to **industry-
standard measures**

Market evolution: longer and larger contracts

Multi-year contracts now the norm in public sector procurements

Our historic policy understates wins on longer contracts

Our conservative policy fit shorter contracts; on longer ones, contract value is understated in reported backlog

TCV: considering industry-standard recognition in FY27

Total Contract Value (TCV) - in line with sector peers

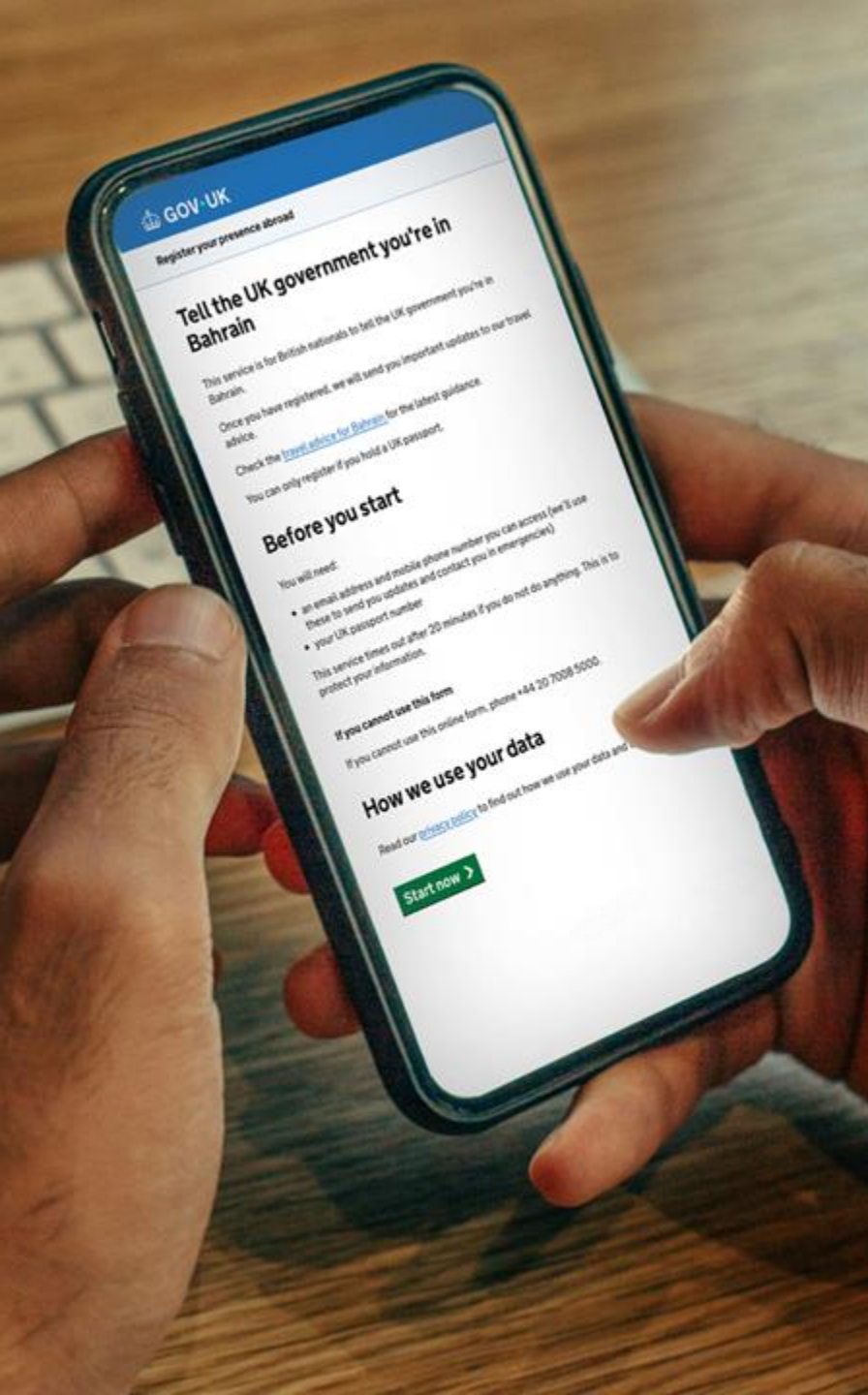
Illustrative: FY26 on the new basis

Backlog: £180m likely to increase to over £400m

Revenue recognition will be unchanged – bookings and backlog disclosure metric only

Significant multi-year wins in FY26

Customer	Project	Months	TCV
DVSA	Driver Services Platform	48	£73m
NHS	Digital Prevention Services	24	£45m
NHS	DDaT Capability and Outcomes	36	£35m
Home Office	Border Platforms	48	£26m
DfT	BODS (Bus Open Data Service)	36	£25m
MoD	Strategic Cloud Partner	24	£14m
NHS	P&P Digital Delivery Partner	24	£10m
NHS	Population Health Management	24	£9m



Powering Digital Support for Citizens in Crisis



150,000+ people
supported across
7 countries
(in 3 weeks)

300 submissions
per minute
handled at peak

24 hours to stand
up 7 countries,
24/7 support
provided

When the Iran crisis began in February 2026, over 150,000 people in the Middle East requested support from the Foreign, Commonwealth and Development Office (FCDO).

Working with FCDO teams, Kainos deployed the digital support that enabled British citizens to register their location across the Middle East. The system was live in seven countries within 24 hours and was quickly followed by the evacuation sign-up service for UK government-chartered flights from Oman and UAE.

The services deployed underpinned the global consular teams' crisis response – enabling FCDO staff to prioritise support for the most vulnerable people and providing data insights to inform the Government's crisis response.

A dedicated team of 10 Kainos experts worked around the clock for three weeks to support the live crisis response.

Kainos have partnered with FCDO for over nine years, supporting them in their mission to support British citizens abroad.

UK Government's Sovereign AI Transformation Partner

A decade of building, delivering and leading

- 2016 ● **AI Practice** established
- 2018 ● **DVSA Fraud Detection** moves to production
- 2020 ● **NCA** AI Partner contract
- 2022 ● **DSTL (MoD)** AI Partner contract
- 2024 ● **UK HSA** AI Partner contract
- 2025 ● **MoD DDAP** contract

FY26
£41m revenue, up 11%

tussell

#7 AI supplier to UK Govt
#1 Sovereign AI supplier to UK Govt

Market Opportunity

UK Government appetite and ambition is clear

Building blocks for success:

- Service redesign
- Data foundations
- Legacy integration
- Secure deployment
- AI assurance
- Live service operations

Despite ambition, adoption will be uneven – internal capability constraints and concerns over safety, security, cost and vendor lock-in

Internal Opportunity

AI tooling has been deployed across the entire organisation

For engineering and deployment activities, the productivity gain is c.20%.

This gain allows us to:

- Build citizen- and patient-facing services faster
- Deploy Workday at greater pace
- Ship more features in every release of our products
- Embed AI into our products, enhancing their value to customers

HM Treasury Spending Review 2025



"The Spending Review sets out plans for a step change in investment in digital and artificial intelligence across public services..."

An additional £1.2 billion will be provided across the Spending Review period to drive forward cross-cutting digital priorities."

*Presented to Parliament
by Chancellor Rachel Reeves
11 June 2025*



Microsoft Service Partner of the Year (UK)
Data & AI Partner of the Year (Ireland)
Open AI Integration Partner



3 of 41 AI solutions available
on the Workday Marketplace

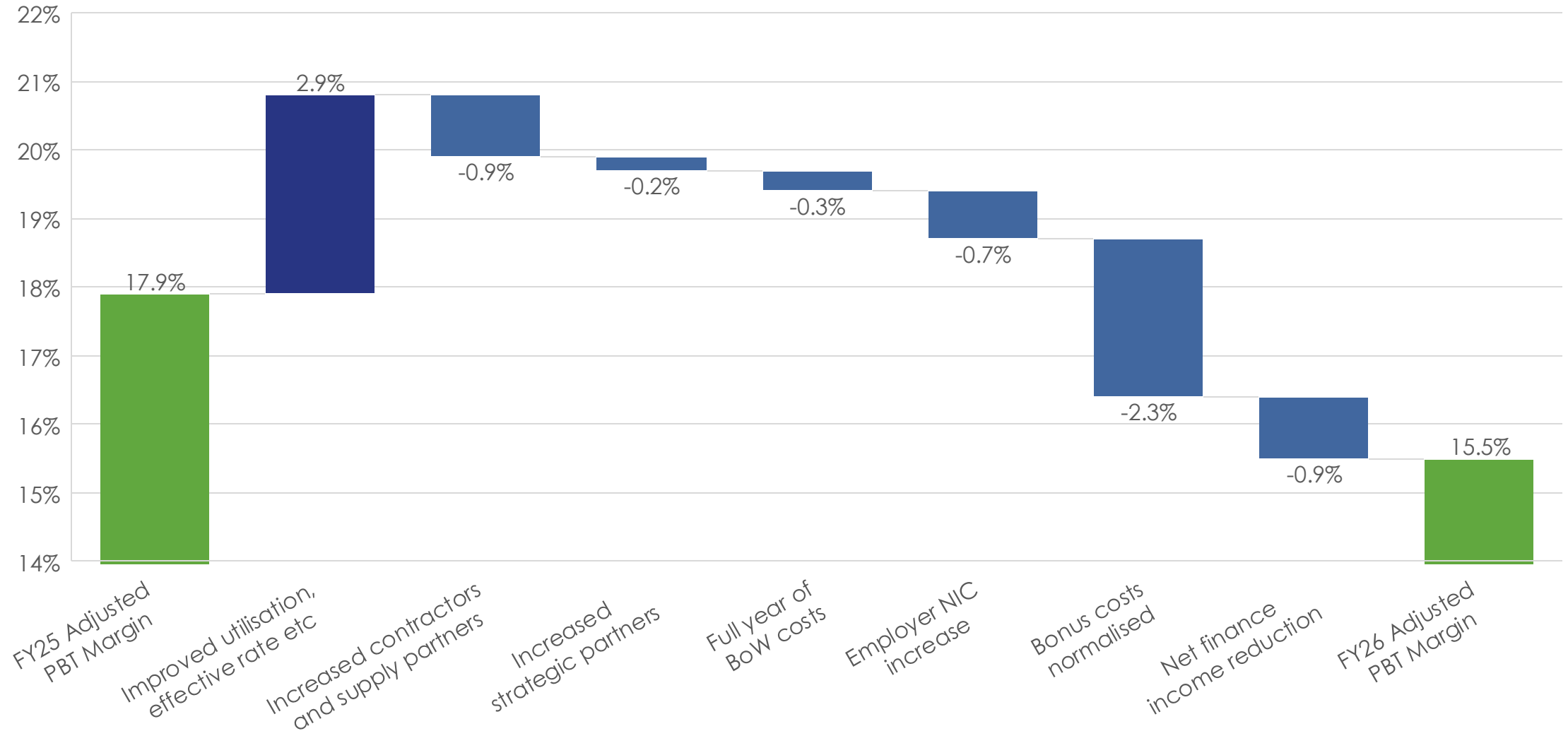


Premier Tier Partner
1% globally

⁽¹⁾ UK Public Sector AI Procurement Tracker, published by market intelligence provider, Tussell, updated on 04 November 2025. ([Report link](#))

Financial Performance

Adjusted PBT Margin walk



Digital Services

£m	FY 26	FY 25	Change
Revenue			
Services	200.3	172.0	16%
Partner	34.1	16.5	107%
Third party & other	7.3	8.7	(16%)
Total revenue	241.7	197.2	23%
Gross margin	86.0	71.7	20%
<i>Gross margin %</i>	<i>35.6%</i>	<i>36.4%</i>	<i>(0.8%)</i>
Direct expenses	(30.4)	(21.5)	41%
Contribution	55.6	50.2	11%
<i>Contribution %</i>	<i>23%</i>	<i>25%</i>	<i>(2%)</i>

Revenue

- Public sector revenue up 11% to £136.0m
- Healthcare revenue up 55% to £74.9m
- Americas revenue up 127% (75% organic) to £20.2m
- Commercial sector revenue reduced 41% to £10.7m

Gross margin

- Increased use of partners and contractors
- Increased Employer NIC rate

Direct expenses

- Largely increased bonus costs

Workday Services

£m	FY 26	FY 25	Change
Revenue			
Services	103.6	95.0	9%
Third party & other	4.0	3.7	8%
Total revenue	107.6	98.7	9%
Gross margin	49.3	51.1	(4%)
Gross margin %	45.8%	51.7%	(5.9%)
Direct expenses	(36.5)	(33.5)	9%
Contribution	12.8	17.6	(27%)
Contribution %	12%	18%	(6%)

Revenue

- Revenue growth 9% (ccy 12%)
- Excluding EDM services growth is 6%
- Americas revenue increased 12% to £56.4m
- EMEA revenue reduced 1% to £47.4m
- Rest of World (mainly APAC) grew from £0.4m to £3.8m

Gross margin

- EDM services transfer reduced margin by 1.9%
- Increased Employer NIC rate

Direct expenses

- Increased bonus costs

Workday Products

£m	FY 26	FY 25	Change
Revenue			
Services	2.2	4.1	(46%)
Subscriptions	79.5	67.3	18%
Total revenue	81.7	71.3	15%
Gross margin	63.6	53.1	20%
Gross margin %	77.8%	74.4%	3.4%
Direct expenses	(40.0)	(33.6)	19%
Contribution	23.6	19.5	21%
Contribution %	29%	27%	2%

Revenue

- Strong revenue growth of 15% (19% ccy)
- Growth excluding EDM services transfer was 18%

ARR

- Very strong growth of 23% to £89.0m (24% ccy)

Gross margin

- Increased by 3% as a result of EDM services transfer

Direct expenses

- Product development increased 11% to £18.7m
- First full year of Built on Workday costs +£2.3m to £7.5m

Group Income Statement

Income Statement

£m	FY 26	FY 25	Change
Revenue	431.1	367.2	17%
Gross profit	198.9	175.9	13%
Direct expenses	(106.9)	(88.7)	21%
Contribution	92.0	87.3	5%
Central overheads (inc. depn., finance income/expense)	(25.0)	(21.6)	16%
Adjusted pre-tax profit	67.1	65.6	2%
<i>Adjusted pre-tax profit margin</i>	16%	18%	(2)%
Adjusting items (SBP, acquisition costs)	(9.0)	(17.0)	(47%)
Profit before tax	58.1	48.6	19%
Taxation	(15.6)	(13.1)	19%
Profit after tax	42.5	35.6	19%

Central overheads/net finance income:

- Central overheads (inc. depn.) increased 2%
- Net finance income decreased 45%
 - Reduced funds on deposit due to share buyback
 - Lower interest rates

Adjusting items

- FY25 restructuring costs £8.4m

Effective Tax Rate 27% (FY 25: 27%)

- Impact of higher tax rates in US
- Non-deductible acquisition expenses in Canada

Balance Sheet and Cashflow

Balance Sheet

(£m)	31 Mar 26	31 Mar 25
Fixed assets and investments	23.5	18.2
Goodwill and Intangible assets	53.1	41.6
Trade receivables and WIP	83.4	54.2
Other assets	24.5	19.5
Cash & treasury deposits	89.1	133.7
Total assets	273.5	267.1
Deferred income	(60.8)	(46.4)
Other liabilities	(112.3)	(82.7)
Shareholders' funds	100.5	138.0

Balance Sheet:

- Fixed assets includes £5.9m Bankmore expenditure in period
- Goodwill & intangible - £12.9m increase due to Davis Pier acquisition
- Underlying trade receivables/WIP
 - Increase driven by Q4 growth of 35%
 - Lock in days 64 days (FY25: 57 days)
- Other liabilities
 - Increase in bonus accrual
 - Increased contractor and partner accruals
 - Increased Corporation Tax/VAT liabilities

Cashflow

£m	FY 26	FY 25
EBITDA⁽²⁾	68.3	64.2
Cash generated by operating activities	67.4	71.8
Cash Conversion	99%	112%
Taxation	(9.7)	(13.0)
Capital expenditure	(8.0)	(3.4)
Proceeds from sale of property	0.1	6.2
Acquisitions of subsidiaries	(7.9)	-
Payment of lease liabilities and interest	(1.2)	(1.1)
Share buyback	(55.7)	(22.6)
Interest paid	(0.4)	(0.3)
Dividends paid	(34.6)	(35.7)
Interest received	3.5	6.0
Amounts placed on treasury deposit	(0.8)	(1.0)
Proceeds from issue of shares	1.2	0.1
Net cash (outflow)/inflow	(46.1)	7.0

Cashflow:

- Cash conversion⁽¹⁾ 99% (FY 25: 112%)
- Share buyback costs £55.7m during the year (FY25: £22.6m)
- Future HQ property estimated £27m spend in FY27

⁽¹⁾ Cashflow from Operations (CFFO) divided by adjusted EBITDA

⁽²⁾ EBITDA adjusted for share-based payments and acquisition related expenses

Capital allocation strategy

Focused on investing for growth, minimising risk and maximising ROI



Growing the business

- Organically
- Targeted acquisitions



Progressive dividend policy

- Total dividend **29.6p** (FY25: 28.4p)



Maintaining a robust balance sheet

- Cash reserves **£89.1m**
- Debt free



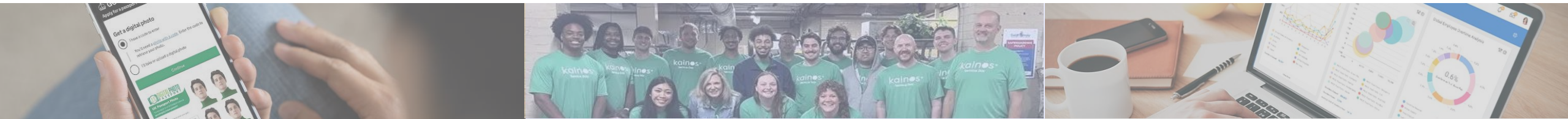
Concluded share buyback

- £90m returned to shareholders
- Cash reserves retained for:
 - Bankmore expenditure
 - Growth in working capital
 - Capacity for targeted M&A

Outlook

Outlook

Strong near-term momentum, clear medium-term opportunity



Medium-term: Opportunity

Powerful structural drivers remain in all three markets as customers deploy technology to improve services and competitiveness

AI is increasing the speed and scope of what we do for our customers, **widening the opportunity**

Medium term growth is supported by ARR scaling, international expansion, increased product mix and rising AI adoption

Near-term: FY27 Priorities

Continued momentum in **Workday Products**: achieve £100m ARR target

Further growth in **Digital Services**: UK public sector and health; Canada expansion

Continued progress in **Workday Services**, including own-product services

Growing colleague capacity in delivery, reducing contractor mix

Foundations: FY26 Performance

BOOKINGS: +32%

£505m

REVENUE: +17%

£431m

BACKLOG: +18%

£434m

ADJ PROFIT: +2%

£67m

ARR: +19%

£89m

PEOPLE: +21%

3,475

Appendix:

Definition of terms

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Active customer: a customer who has signed a contract with us within the last three months or has generated revenue in the last six months.

Adjusted earnings per share (basic and diluted): adjusted profit after tax divided by the weighted average number of ordinary shares outstanding (basic) or weighted average number of ordinary shares outstanding after adjustment for the effects of all dilutive potential ordinary shares (diluted).

Adjusted EBITDA: adjusted pre-tax profit excluding interest, tax, depreciation of property, plant and equipment, and right-of-use assets, and amortisation of intangible assets.

Adjusted pre-tax profit: profit before tax excluding the effect of share-based payment expense, acquisition-related expenses including amortisation of acquired intangible assets and deferred consideration (including post combination remuneration expense).

Adjusted profit margin: adjusted profit as a percentage of revenue for the period.

Agentic AI: refers to intelligent systems that can autonomously plan, decide, and act to achieve defined goals, working across multiple steps and systems with minimal human intervention. These agents combine reasoning, learning, and action capabilities to deliver outcomes, not just insights, while operating within clear ethical, governance, and organisational boundaries.

Annual Recurring Revenue (ARR): the total of the annualised committed subscription value contracted at the end of the reporting period.

Bookings: the total value of sales contracted during the period.

Cash conversion: cash generated from operating activities as a percentage of adjusted EBITDA.

Constant currency (ccy): excludes the effect of foreign currency exchange rate fluctuations on period-on-period performance by translating the relevant prior period

figure at current period average exchange rates.

Contracted backlog: the value of contracted revenue that has yet to be recognised.

Compound annual growth rate (CAGR): annual growth rate over a specified period of time.

Existing customer revenue: total revenue recognised from customers in the current period who were also customers in the preceding year.

International revenue: total revenue derived from locations outside of UK and Ireland.

Net Promoter Score (NPS): a metric that organisations use to measure customer loyalty toward their brand, product or service, which can range from -100 to +100. Bain & Co, the creators of the metric, held that a score above 0 is good; 20+ is favourable; 50+ is excellent and 80+ is world-class.

Organic revenue: our revenues excluding revenue from acquisitions completed in the current and comparative reporting periods.

Software as a service (SaaS): a software distribution model that delivers application programmes over the internet, with users typically accessing the programme through a web browser. Users pay an ongoing subscription to use the software rather than purchasing it once and installing it.

Science based targets initiative (SBTi): a target for reducing greenhouse gases and CO₂ emissions which is aligned with the global effort to limit global warming to 1.5°C.



kainos®

Outlook

We have strong positions in growing, diverse, international markets

Digital Services

Drive digital transformation in UK public and health sectors

Expand in Canada public and health sectors leveraging **Davis Pier** expertise and our UK experience

Reset plan for UK commercial sector

Workday Services

Drive **core existing markets** and expand into **international markets**

Maximise delivery of Employee Document Management and Pay Transparency **consulting services**

Workday Products

Continue **progress** towards £100m and £200m ARR targets

Develop **Pay Transparency** under Workday resell arrangement

Increase cadence of new product launches