

ValuingTools

Teaser

Technology for industrial processes

Technological solutions for industrial process optimization

Portuguese company with more than 30 years of activity, specialized in the integration of solutions for the optimization of industrial processes.

Appreciation

Enterprise value	+ 450,000 €
Net debt	- 43,000 €
Equity value	= 407,000 €



- ❑ It operates in critical areas of the operation, with emphasis on laser marking (CO2 and fiber), aseptic filling, serialization, control and inspection, offering a range of equipment adjusted to different production lines and regulatory requirements.
- ❑ With a pioneering track record in the Iberian market and strong implementation capacity, it maintains a value proposition based on applied innovation, operational reliability, efficiency and sustainability. The multidisciplinary team accompanies customers from diagnosis to installation, training and after-sales service, ensuring close support and solutions adapted to each manufacturing reality.



Critical technology, complete integration and consistent industrial performance.

Income statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Revenue	751,220	826,342	875,923	928,478	984,187
<i>growth (%)</i>	<i>59.8%</i>	<i>10.0%</i>	<i>6.0%</i>	<i>6.0%</i>	<i>6.0%</i>
Cost of goods sold	-368,098	-404,908	-429,202	-454,954	-482,252
Gross profit	383,122	421,435	446,721	473,524	501,935
<i>Gross margin %</i>	<i>51.0%</i>	<i>51.0%</i>	<i>51.0%</i>	<i>51.0%</i>	<i>51.0%</i>
Payroll expenses	-152,323	-159,939	-167,936	-176,333	-185,150
Supplies and external services	-195,317	-214,849	-227,740	-241,404	-255,889
Other operating income	21,034	23,138	24,526	25,997	27,557
Other operating expenses	-1,502	-1,653	-1,752	-1,857	-1,968
EBITDA	55,014	68,131	73,818	79,927	86,486
<i>EBITDA margin %</i>	<i>7.3%</i>	<i>8.2%</i>	<i>8.4%</i>	<i>8.6%</i>	<i>8.8%</i>
Depreciation & amortization expenses	-1,468	-1,604	-500	-700	-900
EBIT	53,546	66,527	73,318	79,227	85,586
<i>EBIT margin %</i>	<i>7.1%</i>	<i>8.1%</i>	<i>8.4%</i>	<i>8.5%</i>	<i>8.7%</i>
EBT	53,546	66,527	73,318	79,227	85,586

Income statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
<i>EBT margin %</i>	<i>7.1%</i>	<i>8.1%</i>	<i>8.4%</i>	<i>8.5%</i>	<i>8.7%</i>
Tax expense	-11,245	-13,971	-15,397	-16,638	-17,973
Net Income	42,301	52,556	57,922	62,589	67,613
<i>Net income margin %</i>	<i>5.6%</i>	<i>6.4%</i>	<i>6.6%</i>	<i>6.7%</i>	<i>6.9%</i>

Balance sheet estimated (€)

	2026E	2027E	2028E	2029E	2030E
Cash and equivalents	137,528	137,528	137,528	190,977	269,272
Operating accounts receivable	61,744	67,919	71,994	76,313	80,892
Inventory	25,111	27,622	29,280	31,037	32,899
Government receivables	0	0	0	0	0
Accruals and deferrals	9,139	10,053	10,657	11,296	11,974
Other receivables	13,627	14,990	15,889	16,843	17,853
Total current assets	247,150	258,112	265,348	326,465	412,890
Fixed operating assets	2,204	1,600	2,100	2,400	2,500
Long-term financial assets	0	0	0	0	0
Total non-current assets	2,204	1,600	2,100	2,400	2,500
Total assets	249,354	259,712	267,448	328,865	415,390
Accounts payable	75,875	82,685	87,513	92,763	98,329
Short-term loans	152,911	85,905	19,013	0	0
Government payable	50,376	55,413	58,738	62,262	65,998
Accruals and deferrals	1,296	1,426	1,511	1,602	1,698

Balance sheet estimated (€)

	2026E	2027E	2028E	2029E	2030E
Other payable	128,299	141,129	149,596	158,572	168,086
Total current liabilities	408,756	366,558	316,371	315,200	334,112
Total liabilities	408,756	366,558	316,371	315,200	334,112
Common stock	29,928	29,928	29,928	29,928	29,928
Retained earnings	-375,142	-332,841	-280,284	-222,363	-159,774
Other equity items	143,511	143,511	143,511	143,511	143,511
Net income	42,301	52,556	57,922	62,589	67,613
Total equity	-159,402	-106,845	-48,924	13,666	81,278
Total liabilities + equity	249,354	259,712	267,448	328,865	415,390

Cash-flow statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Net income	42,301	52,556	57,922	62,589	67,613
(+) Depreciation & amortization expenses	1,468	1,604	500	700	900
Δ to net working capital	-14,730	13,845	9,471	10,172	10,783
Operational cash-flow	29,039	68,005	67,892	73,462	79,295
Δ long-term financial investment	0	0	0	0	0
CAPEX	-1,000	-1,000	-1,000	-1,000	-1,000
Cash-flow after investment	28,039	67,005	66,892	72,462	78,295
Δ short-term debt	-28,039	-67,005	-66,892	-19,013	0
Cash-flow after financing	0	0	0	53,448	78,295
Cash balance	137,528	137,528	137,528	190,977	269,272

