

ValuingTools

Teaser

IT Services Company

IT services and specialized technical support company

With a consolidated presence in the Portuguese market and participation in international projects, the company operates in the IT area.

Valorização		KPIs	2024
Enterprise value	+ 385,000 €	Turnover	205,000 €
Excess availability	+ 100,000 €	Accounting EBITDA	65,000 €
Equity value	= 485,000 €	Adjustments (+/-)	14,570 €
EBITDA Multiple	4.5x	Adjusted EBITDA	= 50,430 €



- ❑ It complements this offer with remote and on-site support, continuous updating of systems and infrastructures and a network of partnerships that reinforces the value proposition with customers. Over time, it has been participating in projects with important business and institutional entities, showing execution capacity and technical know-how.
- ❑ **Experience, reliability and close technical support.**



Income statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Revenue	251,788	264,377	277,596	288,700	300,248
<i>growth (%)</i>	<i>5.0%</i>	<i>5.0%</i>	<i>5.0%</i>	<i>4.0%</i>	<i>4.0%</i>
Cost of goods sold	-81,579	-85,658	-89,941	-93,539	-97,280
Gross profit	170,208	178,719	187,655	195,161	202,967
<i>Gross margin %</i>	<i>67.6%</i>	<i>67.6%</i>	<i>67.6%</i>	<i>67.6%</i>	<i>67.6%</i>
Operating grants	1,511	1,586	1,666	1,732	1,801
Payroll expenses	-39,290	-41,255	-43,318	-45,483	-47,758
Supplies and external services	-73,774	-77,462	-81,336	-84,589	-87,973
Other operating income	26,689	28,024	29,425	30,602	31,826
Other operating expenses	-2,770	-2,908	-3,054	-3,176	-3,303
EBITDA	82,575	86,704	91,039	94,247	97,562
<i>EBITDA margin %</i>	<i>32.8%</i>	<i>32.8%</i>	<i>32.8%</i>	<i>32.6%</i>	<i>32.5%</i>
Depreciation & amortization expenses	-6,700	-7,200	-1,439	-1,750	-2,250
EBIT	75,875	79,504	89,600	92,497	95,312
<i>EBIT margin %</i>	<i>30.1%</i>	<i>30.1%</i>	<i>32.3%</i>	<i>32.0%</i>	<i>31.7%</i>

Income statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Financial expense	0	0	0	0	0
Financial income	39	39	39	39	39
EBT	75,914	79,543	89,639	92,536	95,351
<i>EBT margin %</i>	<i>30.2%</i>	<i>30.1%</i>	<i>32.3%</i>	<i>32.1%</i>	<i>31.8%</i>
Tax expense	-15,942	-16,704	-18,824	-19,433	-20,024
Net Income	59,972	62,839	70,815	73,104	75,327
<i>Net income margin %</i>	<i>23.8%</i>	<i>23.8%</i>	<i>25.5%</i>	<i>25.3%</i>	<i>25.1%</i>

Balance sheet estimated (€)

	2026E	2027E	2028E	2029E	2030E
Cash and equivalents	158,075	241,711	291,394	346,465	403,693
Operating accounts receivable	517,372	507,025	532,376	553,671	575,818
Inventory	9,387	9,857	10,349	10,763	11,194
Government receivables	0	0	0	0	0
Accruals and deferrals	712	748	785	817	849
Other receivables	0	0	0	0	0
Total current assets	685,547	759,340	834,905	911,716	991,553
Fixed operating assets	11,389	9,189	12,750	16,000	18,750
Long-term financial assets	217	217	217	217	217
Total non-current assets	11,606	9,406	12,967	16,217	18,967
Total assets	697,153	768,746	847,872	927,933	1,010,520
Accounts payable	37,578	40,337	42,354	44,024	45,785
Government payable	33,929	35,626	37,407	38,903	40,459
Other payable	85,971	90,269	94,783	98,574	102,517
Total current liabilities	157,478	166,232	174,544	181,501	188,761

Balanço projetado (€)

	2026E	2027E	2028E	2029E	2030E
Other non-current liabilities	0	0	0	0	0
Total non-current liabilities	0	0	0	0	0
Total liabilities	157,478	166,232	174,544	181,501	188,761
Common stock	50,000	50,000	50,000	50,000	50,000
Retained earnings	388,028	448,000	510,839	581,654	654,758
Other equity items	41,674	41,674	41,674	41,674	41,674
Net income	59,972	62,839	70,815	73,104	75,327
Total equity	539,675	602,514	673,328	746,432	821,759
Total liabilities + equity	697,153	768,746	847,872	927,933	1,010,520

Cash-flow statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Net income	59,972	62,839	70,815	73,104	75,327
(+) Depreciation & amortization expenses	6,700	7,200	1,439	1,750	2,250
Δ to net working capital	-5,328	18,597	-17,570	-14,783	-15,350
Operational cash-flow	61,344	88,635	54,684	60,071	62,228
Δ other liabilities	0	0	0	0	0
Δ long-term financial investment	0	0	0	0	0
CAPEX	-5,000	-5,000	-5,000	-5,000	-5,000
Cash-flow after investment	56,344	83,635	49,684	55,071	57,228
Δ equity	0	0	0	0	0
Cash-flow after financing	56,344	83,635	49,684	55,071	57,228
Cash balance	158,075	241,711	291,394	346,465	403,693

