ValuingTools

Teaser

Home Automation Company

Smart technology for more efficient spaces

Combining innovation, design and technical expertise, it develops automation solutions that make homes, buildings and professional spaces more comfortable, functional and secure.

Valuation	
Enterprise value	+ 500,000 €
Financial Debt	- 290,000 €
Cash and Cash Equivalents	+ 30,000 €
Equity value	= 240,000 €
2025 Revenue Multiple	1.0x

Portuguese company specialized in the development and commercialization of smart home and automation solutions, enabling the integrated management of lighting, climate control, blinds, sound and security systems. Its offering includes multifunction touch interfaces and equipment compatible with leading international automation protocols, ensuring flexibility and integration across different types of projects. With in-house development capabilities, specialized technical support and a network of partners and installers, it presents a differentiated value proposition based on technological quality, ease of use and the growing demand for smarter and more efficient buildings.

Innovation, integration and intelligent control in a single system.

1. Investment thesis

- ✓ Asset with differentiated positioning in the home automation and automation market, combining its own technological development, functional design and integration of systems for homes, buildings and professional spaces.
- ✓ The growth potential can be accelerated through commercial reinforcement, the expansion of the network of installers and partnerships with architects and real estate developers, as well as a greater presence in B2B projects and the increase in recurrence through technical support and maintenance services, allowing to explore segments with higher added value and sustain a more structured and differentiated growth trajectory.

2. Other 2025 indicators

No. Employees	Revenue	Payment Term	Collection Term	EV/EBITDA 2030E
10	€500,000	27 days	83 days	3.0x

Note: The values presented were prepared based on information provided by the company and may reflect final or provisional data as of the date of sharing.

3. Opportunity

The opportunity is based on the acquisition of a specialized technological platform that, after an internal restructuring process, is supported by the most advanced product developed by the company to date. Despite the quality and commercial potential of the solution, the sales structure remains highly dependent on a single resource currently at a transition phase, having recently started to be reinforced by a new member with high commercial experience. An investor will be able to accelerate this process, professionalize the approach to the market, expand the network of partners and transform the current technological potential into sustained growth.

Projected income statement (€)

Distributed by ValuingTools

	2026E	2027E	2028E	2029E	2030E
Revenue	**506,184**	**544,148**	**612,166**	**703,991**	**827,190**
growth (%)	*2.5%*	*7.5%*	*12.5%*	*15.0%*	*17.5%*
COGS	-118,447	-127,331	-143,247	-164,734	-193,562
Gross margin	387,737	416,817	468,920	539,257	633,627
Gross margin %	*76.6%*	*76.6%*	*76.6%*	*76.6%*	*76.6%*
Operating subsidies	0	0	0	0	0
Personnel expenses	-290,864	-299,590	-308,577	-317,835	-327,370
External supplies and services	-70,866	-76,181	-85,703	-98,559	-115,807
Other operating income	0	0	0	0	0
Other operating expenses	-24,297	-26,119	-29,384	-33,792	-39,705
EBITDA	1,711	14,928	45,255	89,072	150,746
EBITDA margin %	*0.3%*	*2.7%*	*7.4%*	*12.7%*	*18.2%*
Depreciation and amortization expenses	-7,348	-8,348	-9,348	-10,348	-11,348
EBIT	-5,637	6,580	35,907	78,725	139,398
EBIT margin %	*-1.1%*	*1.2%*	*5.9%*	*11.2%*	*16.9%*

Projected income statement (€)

Distributed by ValuingTools

	2026E	2027E	2028E	2029E	2030E
Financial expenses	-7,760	-7,053	-7,027	-6,721	-5,648
Financial income	0	0	0	0	0
EBT	-13,397	-473	28,880	72,004	133,750
EBT margin %	*-2.6%*	*-0.1%*	*4.7%*	*10.2%*	*16.2%*
Income tax	0	0	-6,065	-15,121	-28,087
Net profit	**-13,397**	**-473**	**22,815**	**56,883**	**105,662**
Net profit margin %	*-2.6%*	*-0.1%*	*3.7%*	*8.1%*	*12.8%*

Projected cash flow statement (€)

	2026E	2027E	2028E	2029E	2030E
Net profit	-13,397	-473	22,815	56,883	105,662
(+) Depreciation and amortization expenses	7,348	8,348	9,348	10,348	11,348
Δ Net working capital	37,275	-1,922	-15,789	-22,473	-30,068
Operating cash flow	**31,225**	**5,953**	**16,374**	**44,757**	**86,942**
Δ Long-term financial investments	0	0	0	0	0
CAPEX	-5,000	-5,000	-5,000	-5,000	-5,000
Cash flow after investment	**26,225**	**953**	**11,374**	**39,757**	**81,942**
Δ Short-term debt	0	0	0	0	0
Δ Long-term debt	-26,225	-953	-11,374	-39,757	-81,942
Δ Equity	0	0	0	0	0
Cash flow after financing	**0**	**0**	**0**	**0**	**0**
Cash balance	29,857	29,857	29,857	29,857	29,857

Contact: +351 929 384 256
E-mail: ma@valuingtools.com