

ValuingTools

Teaser

Construction Materials and Equipment Company

Integrated solutions for materials and equipment for construction

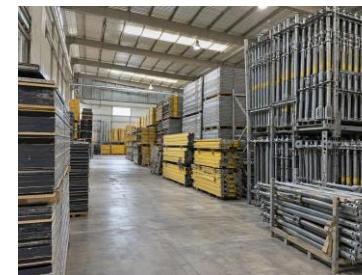
Marketing of formwork materials and machinery, complemented by a rental offer adapted to the needs of each project.

Appreciation		KPIs	2025
Enterprise value	+ 3,900,000 €	Turnover	6,145,000 €
Excess cash	+ 1,165,000€	Accounting EBITDA	845,000 €
Real Estate Value	+ 2,000,000 €	Adjustments (+/-)	60,000 €
Equity value	= 7,065,000 €	Adjusted EBITDA	785,000 €
EBITDA Multiple	4.9x		



- ❑ Company dedicated to the commercialization of materials for the construction sector, namely formwork solutions, beams, panels, props, formwork plywood, wall formwork and scaffolding. It complements its offer with the sale and rental of small and large machinery and equipment.
- ❑ The company is mainly aimed at professionals and construction companies, to whom it provides solutions adjusted to the needs of each work. It also has its own workshop for maintenance and repair of equipment, a complementary activity that reinforces the service provided to customers.

An operation built to respond to the different needs of the work.





1. Investment thesis

- ✓ Commercial model with two complementary forms of monetization, which combines the sale of materials and equipment with rental, which allows you to monitor different customer needs throughout the works and increase the scope of the commercial relationship.
- ✓ Its own operational infrastructure developed throughout the company's history, which integrates several industrial spaces and internal maintenance capacity, which ensures the storage of materials and the availability of equipment for rental.
- ✓ Proven track record of development with relevant companies in the construction sector. The evolution of demand supported the expansion of the facilities, the growth of the team and the progressive introduction of the rental activity.



2. Other indicators 2026E

 Turnover 6,9M€	 EBITDA 856k€	 EBITDA Margin 12,4%	 OCF 627€	 CF Post-CAPEX 327€
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Note: The values presented were prepared based on the information provided by the company and may reflect final or provisional data at the time of their sharing.



3. Opportunity

The company has already built a relevant operation in the commercialization of materials and equipment and has developed a complementary rental offer, supported by its own operational infrastructure. An acquirer with greater financial capacity and commercial coverage will be able to accelerate the expansion of the rental equipment park, expand the available offer and increase penetration among existing and new customers, using an operational base already installed.

Income statement estimated (€)

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	2026E	2027E	2028E	2029E	2030E
Revenue	6,914,389	7,605,828	7,986,120	8,385,426	8,804,697
<i>growth (%)</i>	<i>12.5%</i>	<i>10.0%</i>	<i>5.0%</i>	<i>5.0%</i>	<i>5.0%</i>
Cost of goods sold	-5,365,566	-5,902,123	-6,197,229	-6,507,090	-6,832,445
Gross profit	1,548,823	1,703,706	1,788,891	1,878,335	1,972,252
<i>Gross margin %</i>	<i>22.4%</i>	<i>22.4%</i>	<i>22.4%</i>	<i>22.4%</i>	<i>22.4%</i>
Operating grants	13,829	15,212	15,972	16,771	17,609
Payroll expenses	-208,426	-229,268	-240,732	-252,768	-265,407
Supplies and external services	-518,579	-570,437	-598,959	-628,907	-660,352
Other operating income	34,572	38,029	39,931	41,927	44,023
Other operating expenses	-13,829	-15,212	-15,972	-16,771	-17,609
EBITDA	856,390	942,029	989,131	1,038,587	1,090,517
<i>EBITDA margin %</i>	<i>12.4%</i>	<i>12.4%</i>	<i>12.4%</i>	<i>12.4%</i>	<i>12.4%</i>
Depreciation & amortization expenses	-47,417	-84,917	-122,417	-142,264	-168,750
EBIT	808,973	857,112	866,714	896,323	921,767
<i>EBIT margin %</i>	<i>11.7%</i>	<i>11.3%</i>	<i>10.9%</i>	<i>10.7%</i>	<i>10.5%</i>

Income statement estimated (€)

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	2026E	2027E	2028E	2029E	2030E
Financial expense	-17,312	-10,183	-2,053	0	0
EBT	791,661	846,929	864,661	896,323	921,767
<i>EBT margin %</i>	<i>11.4%</i>	<i>11.1%</i>	<i>10.8%</i>	<i>10.7%</i>	<i>10.5%</i>
Tax expense	-166,249	-177,855	-181,579	-188,228	-193,571
Net Income	625,413	669,074	683,082	708,095	728,196
<i>Net income margin %</i>	<i>9.0%</i>	<i>8.8%</i>	<i>8.6%</i>	<i>8.4%</i>	<i>8.3%</i>

Cash-flow statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Net income	625,413	669,074	683,082	708,095	728,196
(+) Depreciation & amortization expenses	47,417	84,917	122,417	142,264	168,750
Δ to net working capital	-45,890	-81,103	-42,575	-35,598	-37,378
Operational cash-flow	626,939	672,888	762,924	814,761	859,568
Δ other assets	0	0	0	0	0
Δ other liabilities	0	0	0	0	0
CAPEX	-300,000	-300,000	-300,000	-300,000	-300,000
Cash-flow after investment	326,939	372,888	462,924	514,761	559,568
Δ long-term debt	-326,939	-372,888	-94,139	0	0
Δ equity	0	0	0	0	0
Cash-flow after financing	0	0	368,785	514,761	559,568
Cash balance	1,959,320	1,959,320	2,328,105	2,842,866	3,402,434

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