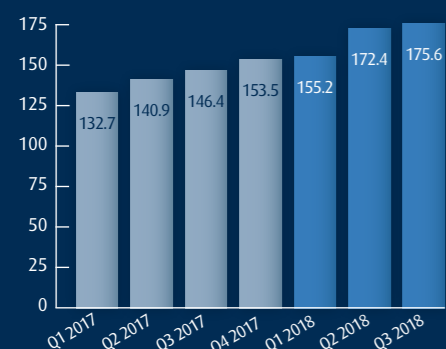
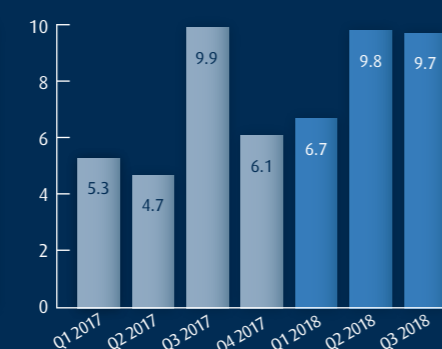




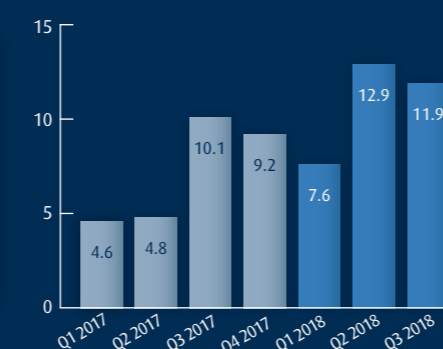
REVENUE\* in EUR million



EBITDA\* in EUR million



ADJUSTED EBITDA\*\* in EUR million



Continuing operations in accordance with IFRS | \*EBITDA before extraordinary or prior-period effects



## Contents

### ALLGEIER SE STANDS FOR STATE-OF-THE-ART SOFTWARE DEVELOPMENT AND FLEXIBLE IT PERSONNEL SERVICES

Allgeier SE is one of the leading IT companies for digital transformation. With a growth strategy geared to innovation and future trends, together with an integrative business model, Allgeier is seizing the opportunities of digitization.

Four segments, each with an individual technical and industrial focus, work together for around 3,000 customers from virtually all sectors; including the public sector. With over 9,000 permanent employees and more than 1,300 freelance experts, Allgeier offers its customers a comprehensive portfolio of solutions and services as a one-stop-shop. With its highly flexible delivery model, Allgeier covers the entire range of IT services – from on-site to nearshore to offshore: A strong standing in India and China guarantees flexibility and the utmost possible scalability of services, alongside highly qualified expert knowledge in high-end software development. Allgeier's customers range from global corporations to innovative mid-sized companies looking to gain a strategic edge through high-performance IT solutions, smart software, and flexible personnel services. Headquartered in Munich, the rapidly growing group has around 140 branches in German-speaking Europe, eleven other European countries and in India, China, the United Arab Emirates, Singapore, Vietnam, Malaysia, Japan, South Africa, Australia, Mexico, and the US. Allgeier generated consolidated revenue of EUR 574 million in fiscal 2017 (continuing operations). According to the 2018 Lünendonk® List, Allgeier SE is one of Germany's top ten IT consulting and system integration companies. According to the 2018 Lünendonk® market segment study, "The Market for Recruitment, Placement and Management of IT Freelancers in Germany", Allgeier Experts is one of the top three IT personnel service providers in Germany. Allgeier SE is listed in the General Standard on the Regulated Market of Frankfurt Stock Exchange (WKN A2GS63, ISIN DE000A2GS633).

@ Further information and the company's latest news can be found at [www.allgeier.com](http://www.allgeier.com).

KEY GROUP INDICATORS*	Q1 - Q3 2018	Q1 - Q3 2017	Change	Q3 2018	Q3 2017	Change
Revenue	503.2	420.0	19.8%	175.6	146.4	20.0%
EBITDA	26.1	19.8	31.7 %	9.7	9.9	-2.1%
Adjusted EBITDA**	32.4	19.7	64.5 %	12.6	10.1	24.8 %
EBIT	16.9	10.7	58.1 %	6.5	6.9	-6.0 %
EBT	14.8	8.4	75.7 %	5.8	6.1	-5.0 %
Profit or loss for the period	8.5	5.1	68.3 %	3.7	3.9	-4.8 %
Earnings per share (EUR)***	0.82	0.40	205.0 %	0.29	0.32	-9.4%
Adjusted earnings per share (in euro)***	1.35	0.65	207.7%	0.49	0.46	6.5%
				<b>Sept. 30, 2018</b>	<b>Dec. 31, 2017</b>	<b>Change</b>
Total assets				454,7	337,9	34.5 %
Equity				130,7	122,8	6.4 %
Permanent employees				9,170	7,077	29.6 %
Freelance experts				1,321	1,393	-5.2 %
Total employees				10,491	8,470	23.9 %

\*Continuing operations in accordance with IFRS, figures in EUR million (unless stated otherwise)  
 \*\*EBITDA before extraordinary or prior-period effects  
 \*\*\*Continuing and discontinued operations

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# Interim information on business performance in the third quarter of 2018

All figures in the statement of comprehensive income relate to continuing operations.

## ALLGEIER GENERATES SIGNIFICANT REVENUE AND EARNINGS GROWTH IN FIRST THREE QUARTERS OF 2018

According to provisional figures, Allgeier SE achieved significant growth in revenue and earnings from continuing operations in the first nine months of 2018 (January 1, 2018 to September 30, 2018).

### Business performance in the first nine months of 2018

In total, consolidated revenue climbed by approximately 20% as against the first nine months of 2017 to EUR 503.2 million in the first nine months of 2018 (continuing operations in the previous year: EUR 420.0 million). Value added (gross revenue less productive staff costs and purchased services) climbed by 27% to EUR 140.1 million (previous year: EUR 110.0 million), with a gross margin of 27.8% (previous year: 26.2%).

Adjusted consolidated EBITDA increased by 64% to EUR 32.4 million (previous year: EUR 19.7 million), corresponding to an adjusted EBITDA margin of 6.4% (previous year: 4.7%). This figure includes extraordinary and prior-period expenses of EUR 6.3 million, which have been adjusted in the interests of year-on-year comparability and the transparent presentation of operating earnings; by contrast, the corresponding extraordinary effects had been offset against income

of EUR 0.2 million in the same period of the previous year. The extraordinary effects in 2018 above all relate to extraordinary costs of the restructuring in the Enterprise Services and Experts segments and the extensive acquisition activities in the Technology segment.

Provisional consolidated EBITDA from continuing operations, including extraordinary effects, rose by 32% to EUR 26.1 million (previous year: EUR 19.8 million). Provisional consolidated EBIT from continuing operations amounted to EUR 16.9 million (previous year: EUR 10.7 million) and was therefore up by 58%. The corresponding EBT for the period was EUR 14.8 million (previous year: EUR 8.4 million), an increase of 76% on the same period of the previous year. After deducting tax expenses of EUR 6.3 million (previous year: EUR 3.4 million), Allgeier generated a profit of EUR 8.5 million in the first three quarters of 2018 (previous year: EUR 5.1 million).

In addition, in the first quarter the Group generated earnings before taxes of EUR 1.9 million in total from the sale of Allgeier Medical IT GmbH, Freiburg, at the end of March 2018. The gain on disposal is reported under discontinued operations.

### Presentation of adjusted earnings per share

To present adjusted earnings per share, the Allgeier Group corrects the reported EBIT for amortization of intangible assets capitalized in connection with company acquisitions (effects of purchase price allocation), income and expenses from purchase price adjustments in profit or loss and other one-time and prior-period effects. Taking into account these adjustments and applying a tax rate of 35%, the Group generated earnings per share of EUR 1.35 in the first nine months of 2018 (previous year: EUR 0.65).

Figures in EUR million (unless stated otherwise)	Q1-Q3 2017	Q1-Q3 2018	Q3 2017	Q3 2018
<b>Profit from operating activities (EBIT as reported)</b>	<b>10.7</b>	<b>16.9</b>	<b>6.9</b>	<b>6.5</b>
Amortization of intangible assets from company acquisitions	3.0	2.8	0.9	1.0
Other non-recurring and prior-period effects	-0.1	6.3	0.6	2.2
Net finance costs	-1.7	-1.4	-0.5	-0.5
Net income from investments accounted for using the equity method	-0.5	-0.7	-0.2	-0.2
<b>Adjusted earnings before taxes</b>	<b>11.4</b>	<b>23.9</b>	<b>7.7</b>	<b>9.0</b>
Tax rate	35.00 %	35.00 %	35.00 %	35.00 %
Taxes	-4.0	-8.4	-2.7	-3.2
<b>Adjusted profit or loss for the period</b>	<b>7.4</b>	<b>15.5</b>	<b>5.0</b>	<b>5.8</b>
Non-controlling interests	-1.4	-2.3	-0.6	-0.9
<b>Earnings for calculation of adjusted earnings per share</b>	<b>5.9</b>	<b>13.3</b>	<b>4.3</b>	<b>5.0</b>
Number of shares outstanding	9,173,401	9,860,391	9,423,897	10,216,889
<b>Adjusted earnings per share in euro (basic)</b>	<b>0.65</b>	<b>1.35</b>	<b>0.46</b>	<b>0.49</b>

The other one-time and prior-period effects include the following items:

- income from the reversal of provisions
- income and losses from the sale of non-current assets
- income and expenses from the change in bad debt allowances
- income from recoveries on loans previously written off
- other income and expenses relating to previous years
- income and expenses from exchange rate differences
- income and expenses from instruments to hedge foreign exchange risks in future cash flows
- external costs for acquisition projects that have not yet been implemented
- external incidental acquisition costs for acquisitions that cannot be capitalized as part of the purchase price under IFRS
- other operating expenses in connection with the financing of the Allgeier Group
- donations
- staff costs such as severance payments and continued pay for employees who have left the company in the context of structural changes
- other extraordinary income and expenses recognized in the accounts of the Group companies

In June 2018, Allgeier acquired 100% of shares in Objectiva Software Solutions, Inc., San Diego, California, USA. The company has been included in consolidation pro rata temporis since July 2018. According to provisional figures, the pro rata contribution included in the above figures was EUR 5 million for revenue and EUR 0.68 million for EBITDA in the third quarter of 2018.

In August 2018, Allgeier signed an agreement to acquire around 67% of the shares in the iQuest Group. The international software company has more than 700 highly qualified software specialists at development centers in Romania and at other locations in Germany, Switzerland, and Poland. The deal was closed and the purchase price paid in September 2018. The statement of financial position of the iQuest Group is included in Allgeier's consolidated statement of financial position as of September 30, 2018. Its income statement will not be included in that of the Allgeier Group until October 1, 2018, hence the purchase price paid in September 2018 is not yet offset by contributions to revenue and earnings in the nine-month figures. The iQuest Group generated revenue of EUR 25.5 million and EBITDA of around EUR 3 million in the first nine months of 2018.

Basic earnings per share, calculated on the basis of earnings for the first nine months less non-controlling interests, were EUR 0.82 in the first nine months of 2018, including the gain on the disposal (previous year: EUR 0.40).

At EUR 22.2 million, the cash flow from operating activities before changes in working capital was significantly higher in the first nine months of 2018 than the previous year's figure of EUR 7.1 million. The cash flow from changes in working capital was EUR -27.5 million after EUR -10.2 million in the same period of the previous year. In addition to business growth, the rise in working capital also results from a reduction in the use of factoring in the amount of EUR 5.3 million (as against an increase in factoring of EUR 6.9 million in the previous year). Cash flow from operating activities thus amounted to EUR -5.2 million in total (previous year: EUR -3.1 million).

The Group's investments in operating activities amounted to EUR 7.4 million (previous year: EUR 5.2 million) in the first nine months of 2018. Cash used for company acquisitions amounted to EUR 31.1 million in the first nine months of 2018 (previous year: EUR 0.1 million), while the cash outflow for acquisitions in previous years came to EUR 1.2 million (previous year: EUR 10.0 million). The Group received EUR 3.1 million from company disposals (previous year: EUR 0.1 million). In total, the cash flow from investing activities amounted to EUR -37.6 million in the reporting period (previous year: EUR -15.7 million).

The net cash inflow from financing activities was EUR 49.0 million in the first nine months of 2018 (previous year: EUR 2.9 million). The Group received EUR 55.9 million (previous year: EUR 13.5 million) from bank borrowings, which was offset by EUR 0.3 million in total for the repayment of borrower's note loans and bank loans (previous year: EUR 1.4 million). Net interest payments came to EUR 1.8 million (previous year: EUR 3.6 million). A dividend of EUR 4.9 million was paid to the shareholders of Allgeier SE at the beginning of the

third quarter. Profits of EUR 0.7 million were distributed to non-controlling interests (previous year: EUR 1.3 million). Furthermore, the Allgeier Group received a cash inflow of EUR 0.9 million from the exercise of stock options.

As a result of cash flows from operating, investing and financing activities, cash and cash equivalents rose from EUR 41.4 million on December 31, 2017 to EUR 47.8 million on September 30, 2018.

**Segment performance in the first nine months of 2018**

The Allgeier Group enjoyed significant growth in the key performance indicators of revenue, value added, adjusted EBITDA, EBITDA and EBIT in the first nine months. All Group segments contributed to the improvement in key performance indicators (see table below).

**Development in the third quarter of 2018**

In the third quarter of 2018 (July 1, 2018 to September 30, 2018), the Group reported an increase in revenue from continuing operations of 20% as against the same period of the previous year to EUR 175.6 million (continuing operations in the previous year: EUR 146.4 million). Value added (gross revenue less productive staff costs and purchased services) climbed by 24% to EUR 50.1 million (previous year: EUR 40.3 million), with a gross margin of 28.5% (previous year: 27.6%).

Adjusted for extraordinary or prior-period effects, consolidated EBITDA for the period was up 14% year-on-year at EUR 11.9 million (previous year: EUR 10.1 million), corresponding to an adjusted EBITDA margin of 6.8% (previous year: 6.9%). In total, adjusted extraordinary and prior-period effects amounted to around EUR -2.2 million in the third quarter of 2018 (previous year: EUR -0.2 million). The main reasons for the higher extraordinary effects as against the previous year are firstly that extraordinary income from currency translation and hedges of EUR 1.1 million was incurred in the Technology segment in the third quarter of 2017 but not in the third quarter of 2018. Secondly, extraordinary expenses of EUR 0.9 million were incurred for former employees of the Experts segment in the third quarter of 2018.

Including extraordinary and prior-period effects, consolidated EBITDA for the third quarter amounted to EUR 9.7 million (previous year: EUR 9.9 million). Consolidated EBIT (earnings before interest and taxes) was EUR 6.5 million in the same period (previous year: EUR 6.9 million).

SEGMENT PERFORMANCE (in EUR million)													
	Enterprise Services		Technology		Experts		New Business Areas		Other		Continuing operations		
	Jan. 1, 2017 to Sept. 30, 2017	Jan. 1, 2018 to Sept. 30, 2018	Jan. 1, 2017 to Sept. 30, 2017	Jan. 1, 2018 to Sept. 30, 2018	Jan. 1, 2017 to Sept. 30, 2017	Jan. 1, 2018 to Sept. 30, 2018	Jan. 1, 2017 to Sept. 30, 2017	Jan. 1, 2018 to Sept. 30, 2018	Jan. 1, 2017 to Sept. 30, 2017	Jan. 1, 2018 to Sept. 30, 2018	Jan. 1, 2017 to Sept. 30, 2017	Jan. 1, 2018 to Sept. 30, 2018	
Revenue	68.6	82.4	161.9	206.5	190.4	216.6	3.7	3.7	-4.7	-6.1	420.0	503.2	
Value added	23.3	29.4	51.9	69.0	34.4	39.8	1.1	2.0	-0.7	-0.2	110.0	140.1	
Value added in %	34.0%	35.6%	32.1%	33.4%	18.1%	18.4%	28.5%	55.3%			26.2%	27.8%	
Adjusted EBITDA	3.7	5.5	17.9	26.5	4.2	7.1	-1.8	-0.2	-4.3	-6.4	19.7	32.4	
Adjusted EBITDA margin in %	5.3%	6.6%	11.1%	12.8%	2.2%	3.3%	-47.1%	-5.3%			4.7%	6.4%	
EBITDA	2.0	3.5	21.6	25.5	3.9	4.9	-1.8	-0.2	-5.9	-7.7	19.8	26.1	
EBITDA margin in %	2.9%	4.3%	13.4%	12.4%	2.0%	2.3%	-49.0%	-5.7%			4.7%	5.2%	
EBIT	-0.0	0.7	16.9	20.6	1.7	3.7	-2.1	-0.4	-5.9	-7.7	10.7	16.9	

### Key statement of financial position data as of September 30, 2018

Total assets were up in the first nine months at EUR 454.7 million as of September 30, 2018 (December 31, 2017: EUR 337.9 million). The main reasons for the increase are the acquisition of the new Group companies and the rise in working capital on account of the growth in operating activities.

The Allgeier Group had cash funds of EUR 64.9 million at its disposal as of the end of the reporting period (December 31, 2017: EUR 53.0 million).

The Group's non-current assets rose from EUR 148.1 million on December 31, 2017 to EUR 195.8 million as of the end of the reporting period. The increase was caused by newly acquired intangible assets and goodwill from the acquisition of the new companies. Current assets increased to EUR 258.9 million over the same period (December 31, 2017: EUR 189.9 million). This is mainly on account of an increase in orders not yet invoiced to customers and a rise in cash funds. Including the assets contributed by the newly acquired companies, trade receivables, inventories and other current assets climbed from EUR 136.9 million as of the end of 2017 to EUR 193.9 million at the end of the reporting period.

Consolidated equity rose to EUR 130.7 million as of September 30, 2018 (December 31, 2017: EUR 122.8 million). The increase was essentially thanks to the profit for the first three quarters of 2018 of EUR 10.3 million. This was offset by the distribution to shareholders of EUR 4.9 million resolved at the 2018 Annual General Meeting. As a result of the increase in total assets, coupled with a simultaneous low rise in consolidated equity, in the first three quarters of 2018 the equity ratio declined from 36.4% at the end of 2017 to 28.8% on September 30, 2018.

Current and non-current liabilities rose by EUR 108.8 million from EUR 215.1 million on December 31, 2017 to EUR 323.9 million on September 30, 2018. Breaking this figure down, non-current liabilities increased from EUR 105.5 million to EUR 169.1 million in the first nine months of 2018, accounting for 53% of total liabilities (December 31, 2017: 49%). Current liabilities rose by EUR 45.3 million from EUR 109.6 million at the end of 2017 to EUR 154.9 million as of the end of the third quarter of 2018. This increase was caused by additions due to acquisition, the rise in liabilities from operating activities and the use of short-term credit facilities at subsidiaries.

As a result of borrowing on the long-term credit facility, current and non-current interest-bearing financial liabilities were up from EUR 108.8 million on December 31, 2017 to EUR 170.6 million as of the end of the reporting period. All other liabilities, with the exception of financial liabilities, increased by EUR 47.0 million from EUR 106.3 million to EUR 153.3 million in the reporting period.

### Acquisitions

Nagarro Austria Beteiligungs GmbH, Vienna, Austria, acquired all shares in ANECON Software Design und Beratung GmbH, Vienna, Austria ("ANECON") in January 2018. In turn, ANECON holds all shares in ANECON Software Design und Beratung GmbH, Dresden. With revenue of EUR 16 million in fiscal 2017, ANECON is one of the Austrian market's leading software development and consulting companies. The company offers the highest possible quality for its customers' IT projects and covers the complete software lifecycle: The approximately 150 employees advise clients on transformations, develop individual software and thus ensure software quality through testing and test automation.

In June 2018, Allgeier Project Solutions GmbH, Munich, signed a purchase agreement to acquire 100% of shares in Objectiva Software Solutions, Inc., San Diego, California, USA ("Objectiva"). The company was founded in 2001 and generated revenue of around USD 24 million with adjusted operating EBITDA of around USD 1.9 million in fiscal 2017. Objectiva specializes in software development solutions and cross-platform technology implementation in the field of e-commerce and content in particular. The company has an excellent customer base on the US market, from private equity-funded independent software manufacturers to Fortune 100 companies. In complement to its US locations in San Diego and Seattle, Objectiva has an additional distribution network in the greater Chicago,

Denver, Indianapolis and Boston areas. Thus, Allgeier is continuing to expand its presence and network on the US market. Furthermore, Objectiva has two Chinese software development centers in Beijing and Xi'an with around 450 highly qualified developers. In gaining these new colleagues, Allgeier is further expanding its expertise in the development of complex software solutions for critical business processes and continuing to advance the Group's internationalization. Alongside its presence on the US market, Objectiva has also developed attractive customer access in China and on other Asian markets. As part of the Allgeier Group, Objectiva will also extend its activities in Germany and Europe in cooperation with the Group companies.

The company was included in consolidation by the Group for the first time as of July 1, 2018.

On August 13, 2018, Allgeier SE signed a purchase agreement to acquire around 67% of the shares in the software development company iQuest Holding GmbH, Bad Homburg, and its subsidiaries ("iQuest Group"). The other shares will remain with the founder Cornelius Brody and the operating management team for the next few years. The iQuest Group was founded in 1998 and generated revenue of more than EUR 30 million with adjusted operating EBITDA of EUR 4.3 million in fiscal 2017. As an international software company, the iQuest Group has more than 700 highly qualified employees at development centers in Cluj, Bucharest, Sibiu, Brasov and Craiova in Romania and at other locations in Germany, Switzerland and Poland. The company creates individual software solutions for major international customers, in particular in the life sciences, telecommunications, financial services, transport and energy sectors. In acquiring this equity investment, Allgeier is further expanding its expertise in the development of complex software solutions for critical business processes and continuing to advance the Group's internationalization. With the significant expansion of its software development resources within the EU, in the future Allgeier will offer even greater scalability thanks to a flexible service and delivery model geared to customer requirements. In addition to its German locations, Allgeier already has European development sites in Prague (Czechia) and Timisoara (Romania), in addition to international development centers in India, Vietnam, and China with more than 5,000 software experts in total.

Allgeier One AG, Munich, acquired all shares in consecra GmbH, Offenburg ("consecra") in August 2018. The consulting and service company specializes in IT service management, information security and data protection to protect the information of companies and public authorities. It generated revenue of around EUR 0.6 million in 2017. As part of the Allgeier Group's IT security unit, consecra will continue to expand its range of security awareness and ISMS consulting products in terms of quality and number.

### Outlook for the fourth quarter of 2018

The Management Board is forecasting continued growth in revenue and earnings in the final quarter of 2018. According to Group planning, revenue from continuing operations – including the consolidation of Objectiva and the iQuest Group – is set to rise by around 25% year-on-year in the fourth quarter of 2018.

# Unaudited interim information as of the third quarter of 2018

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OF ALLGEIER SE

CONSOLIDATED STATEMENT OF FINANCIAL POSITION OF ALLGEIER SE, MUNICH,  
IN ACCORDANCE WITH IFRS AS OF SEPTEMBER 30, 2018 (UNAUDITED)

CONSOLIDATED STATEMENT OF FINANCIAL POSITION (in EUR thousand)		
ASSETS	September 30, 2018	December 31, 2017
Intangible assets	162,876	118,043
Property, plant and equipment	16,342	13,461
Investments accounted for using the equity method	3,510	3,632
Non-current contract costs	693	776
Other non-current financial assets	7,064	6,932
Other non-current assets	388	257
Deferred tax assets	4,942	4,995
<b>Non-current assets</b>	<b>195,815</b>	<b>148,094</b>
Inventories	1,394	513
Current contract costs	685	260
Contractual assets	27,442	4,448
Trade receivables	132,506	112,118
Other current financial assets	12,638	6,118
Other current assets	11,362	7,324
Income tax receivables	7,919	6,072
Cash	64,911	52,997
<b>Current assets</b>	<b>258,858</b>	<b>189,850</b>
<b>Assets</b>	<b>454,673</b>	<b>337,944</b>

CONSOLIDATED STATEMENT OF FINANCIAL POSITION (in EUR thousand)		
EQUITY AND LIABILITIES	September 30, 2018	December 31, 2017
Issued capital	10,069	9,979
Capital reserves	33,328	32,214
Retained earnings	102	102
Treasury shares	-1,379	-1,379
Profit carryforward	66,558	68,671
Profit or loss for the period	8,049	2,801
Changes in equity recognized directly in equity	-6,878	-5,154
<b>Equity interest of shareholders of the parent company</b>	<b>109,849</b>	<b>107,234</b>
Equity interest of non-controlling interests	20,878	15,611
<b>Equity</b>	<b>130,727</b>	<b>122,845</b>
Non-current financial liabilities	146,965	95,473
Pension provisions	858	673
Other long-term provisions	2,357	2,521
Other non-current financial liabilities	15,706	3,104
Other non-current liabilities	191	191
Deferred tax liabilities	2,987	3,490
<b>Non-current liabilities</b>	<b>169,064</b>	<b>105,453</b>
Current financial liabilities	23,646	13,327
Other short-term provisions	21,211	15,397
Contractual liabilities	910	2,404
Trade payables	30,204	33,825
Other current financial liabilities	52,606	26,054
Other current liabilities	14,297	13,357
Income tax liabilities	12,008	5,282
<b>Current liabilities</b>	<b>154,881</b>	<b>109,647</b>
<b>Equity and liabilities</b>	<b>454,673</b>	<b>337,944</b>

CONSOLIDATED STATEMENT OF COMPREHENSIVE INCOME OF ALLGEIER SE, MUNICH, IN ACCORDANCE WITH IFRS FOR THE PERIOD JANUARY 1, 2018 TO SEPTEMBER 30, 2018 (UNAUDITED)

CONSOLIDATED STATEMENT OF COMPREHENSIVE INCOME (in EUR thousand)							
Income statement	Total		Discontinued operations		Continuing operations		
	Jan, 1, 2018 to Sept, 30, 2018	Jan, 1, 2017 to Sept, 30, 2017	Jan, 1, 2018 to Sept, 30, 2018	Jan, 1, 2017 to Sept, 30, 2017	Jan, 1, 2018 to Sept, 30, 2018	Jan, 1, 2017 to Sept, 30, 2017	
Revenue	503,846	422,324	687	2,367	503,158	419,957	
Other own work capitalized	352	783	0	0	352	783	
Other operating income	1,953	3,354	0	0	1,953	3,353	
Cost of materials	165,981	144,528	189	653	165,791	143,875	
Staff costs	253,127	209,781	342	1,003	252,785	208,778	
Other operating expenses	60,876	52,032	117	438	60,760	51,594	
<b>Earnings before interest, taxes, depreciation and amortization</b>	<b>26,167</b>	<b>20,120</b>	<b>39</b>	<b>273</b>	<b>26,128</b>	<b>19,846</b>	
Depreciation, amortization and impairment	9,233	9,172	5	14	9,228	9,159	
<b>Results of operating activities</b>	<b>16,934</b>	<b>10,947</b>	<b>34</b>	<b>260</b>	<b>16,900</b>	<b>10,688</b>	
Finance income	346	300	0	0	346	300	
Financial expenses	1,733	2,032	0	0	1,733	2,032	
Net income from investments accounted for using the equity method	-676	-512	0	0	-676	-512	
<b>Earnings before taxes</b>	<b>14,870</b>	<b>8,703</b>	<b>34</b>	<b>259</b>	<b>14,836</b>	<b>8,444</b>	
Net income taxes	-6,325	-3,385	-11	-6	-6,314	-3,380	
<b>Profit or loss for the period</b>	<b>8,545</b>	<b>5,318</b>	<b>23</b>	<b>254</b>	<b>8,522</b>	<b>5,064</b>	
<b>Discontinued operations:</b>							
Gain on disposal before taxes	1,859	-200	1,859	-200	0	0	
Net income taxes	-98	0	-98	0	0	0	
<b>Earnings from discontinued operations</b>	<b>1,761</b>	<b>-200</b>	<b>1,761</b>	<b>-200</b>	<b>0</b>	<b>0</b>	
<b>Total comprehensive income including discontinued operations:</b>							
Earnings before taxes	16,730	8,503	1,894	59	14,836	8,444	
Net income taxes	-6,423	-3,385	-109	-6	-6,314	-3,380	
<b>Total comprehensive income for the period</b>	<b>10,306</b>	<b>5,118</b>	<b>1,784</b>	<b>54</b>	<b>8,522</b>	<b>5,064</b>	
<b>Total comprehensive income for the period attributable to:</b>							
shareholders of the parent company	8,049	3,681	1,784	54	6,264	3,627	
non-controlling interests	2,258	1,437	0	0	2,258	1,437	
<b>Other comprehensive income</b>							
<b>Items that cannot be reclassified to the income statement:</b>							
Actuarial gains (losses)	43	54	0	0	43	54	
Tax effects	-16	-18	0	0	-16	-18	
	<b>27</b>	<b>35</b>	<b>0</b>	<b>0</b>	<b>27</b>	<b>35</b>	
<b>Items that cannot be reclassified to the income statement:</b>							
Foreign exchange differences	-1,751	-8,517	0	0	-1,751	-8,517	
	<b>-1,751</b>	<b>-8,517</b>	<b>0</b>	<b>0</b>	<b>-1,751</b>	<b>-8,517</b>	
<b>Other comprehensive income for the period</b>	<b>-1,724</b>	<b>-8,482</b>	<b>0</b>	<b>0</b>	<b>-1,724</b>	<b>-8,482</b>	
<b>Total comprehensive income for the period</b>	<b>8,582</b>	<b>-3,364</b>	<b>1,784</b>	<b>54</b>	<b>6,798</b>	<b>-3,418</b>	
<b>Total comprehensive income for the period attributable to:</b>							
shareholders of the parent company	6,568	-3,138	1,784	54	4,783	-3,192	
non-controlling interests	2,014	-226	0	0	2,014	-226	
<b>Basic earnings per share:</b>							
Average number of shares outstanding weighted pro rata temporis	9,860,391	9,173,401	9,860,391	9,173,401	9,860,391	9,173,401	
Earnings per share in EUR	0.82	0.40	0.18	0.01	0.64	0.40	
<b>Diluted earnings per share:</b>							
Average number of shares outstanding weighted pro rata temporis	10,169,374	9,406,833	10,169,374	9,406,833	10,169,374	9,406,833	
Earnings per share in EUR	0.79	0.39	0.18	0.01	0.62	0.39	



CONSOLIDATED STATEMENT OF COMPREHENSIVE INCOME OF ALLGEIER SE, MUNICH, IN ACCORDANCE WITH IFRS FOR THE PERIOD JULY 1, 2018 TO SEPTEMBER 30, 2018 (UNAUDITED)

CONSOLIDATED STATEMENT OF COMPREHENSIVE INCOME (in EUR thousand)						
Income statement	Total		Discontinued operations		Continuing operations	
	Jul, 1, 2018 to Sept, 30, 2018	Jul, 1, 2017 to Sept, 30, 2017	Jul, 1, 2018 to Sept, 30, 2018	Jul, 1, 2017 to Sept, 30, 2017	Jul, 1, 2018 to Sept, 30, 2018	Jul, 1, 2017 to Sept, 30, 2017
Revenue	175,610	147,118	0	729	175,610	146,389
Other own work capitalized	177	-67	0	0	177	-67
Other operating income	497	1,135	0	0	-1,109	-262
Cost of materials	56,917	49,286	0	167	56,917	49,118
Staff costs	88,095	71,332	0	317	86,489	69,618
Other operating expenses	21,588	17,571	0	138	21,588	17,433
<b>Earnings before interest, taxes, depreciation and amortization</b>	<b>9,684</b>	<b>9,998</b>	<b>0</b>	<b>107</b>	<b>9,684</b>	<b>9,891</b>
Depreciation, amortization and impairment	3,198	2,999	0	5	3,198	2,994
<b>Results of operating activities</b>	<b>6,486</b>	<b>6,998</b>	<b>0</b>	<b>102</b>	<b>6,486</b>	<b>6,897</b>
Finance income	62	113	0	0	62	113
Financial expenses	518	662	0	0	518	662
Net income from investments accounted for using the equity method	-192	-207	0	0	-192	-207
<b>Earnings before taxes</b>	<b>5,837</b>	<b>6,243</b>	<b>0</b>	<b>102</b>	<b>5,837</b>	<b>6,141</b>
Net income taxes	-2,167	-2,287	0	-2	-2,167	-2,285
<b>Profit or loss for the period</b>	<b>3,671</b>	<b>3,956</b>	<b>0</b>	<b>100</b>	<b>3,671</b>	<b>3,856</b>
<b>Discontinued operations:</b>						
Gain on disposal before taxes	-1	-200	-1	-200	0	0
Net income taxes	0	0	0	0	0	0
<b>Earnings from discontinued operations</b>	<b>-1</b>	<b>-200</b>	<b>-1</b>	<b>-200</b>	<b>0</b>	<b>0</b>
<b>Total comprehensive income including discontinued operations:</b>						
Earnings before taxes	5,836	6,043	-1	-98	5,837	6,141
Net income taxes	-2,167	-2,287	0	-2	-2,167	-2,285
<b>Total comprehensive income for the period</b>	<b>3,670</b>	<b>3,756</b>	<b>-1</b>	<b>-100</b>	<b>3,671</b>	<b>3,856</b>
<b>Total comprehensive income for the period attributable to:</b>						
shareholders of the parent company	2,853	3,111	-1	-100	2,854	3,211
non-controlling interests	817	644	0	0	817	644
<b>Other comprehensive income</b>						
<b>Items that cannot be reclassified to the income statement:</b>						
Actuarial gains (losses)	20	18	0	0	20	18
Tax effects	-8	-6	0	0	-8	-6
	<b>13</b>	<b>12</b>	<b>0</b>	<b>0</b>	<b>13</b>	<b>12</b>
<b>Items that cannot be reclassified to the income statement:</b>						
Foreign exchange differences	-1,378	-1,053	0	0	-1,378	-1,053
	<b>-1,378</b>	<b>-1,053</b>	<b>0</b>	<b>0</b>	<b>-1,378</b>	<b>-1,053</b>
<b>Other comprehensive income for the period</b>	<b>-1,365</b>	<b>-1,041</b>	<b>0</b>	<b>0</b>	<b>-1,365</b>	<b>-1,041</b>
<b>Total comprehensive income for the period</b>	<b>2,304</b>	<b>2,715</b>	<b>-1</b>	<b>-100</b>	<b>2,306</b>	<b>2,815</b>
<b>Total comprehensive income for the period attributable to:</b>						
shareholders of the parent company	1,728	2,505	-1	-100	1,729	2,605
non-controlling interests	577	210	0	0	577	210
<b>Basic earnings per share:</b>						
Average number of shares outstanding weighted pro rata temporis	9,906,124	9,827,450	9,906,124	9,827,450	9,906,124	9,827,450
Earnings per share in EUR	0.29	0.32	0.00	-0.01	0.29	0.33
<b>Diluted earnings per share:</b>						
Average number of shares outstanding weighted pro rata temporis	10,216,889	9,423,897	10,216,889	9,423,897	10,216,889	9,423,897
Earnings per share in EUR	0.28	0.33	0.00	-0.01	0.28	0.34

CONSOLIDATED STATEMENT OF CASH FLOWS OF ALLGEIER SE, MUNICH, IN ACCORDANCE WITH IFRS FOR THE PERIOD JANUARY 1, 2018 TO SEPTEMBER 30, 2018 (UNAUDITED)

CONSOLIDATED STATEMENT OF CASH FLOWS (in EUR thousand)						
	Total		Discontinued operations		Continuing operations	
	Jul, 1, 2018 to Sept, 30, 2018	Jul, 1, 2017 to Sept, 30, 2017	Jul, 1, 2018 to Sept, 30, 2018	Jul, 1, 2017 to Sept, 30, 2017	Jul, 1, 2018 to Sept, 30, 2018	Jul, 1, 2017 to Sept, 30, 2017
Results of operating activities	16,934	10,947	34	260	16,900	10,688
Depreciation and amortization on non-current assets	9,233	9,172	5	14	9,228	9,159
Expenses on the disposal of non-current assets	237	22	0	0	237	22
Change in long-term provisions	93	9	0	0	93	9
Other non-cash expenses and income	2,746	-4,318	0	0	2,746	-4,318
Income taxes paid	-7,032	-8,686	-98	6	-6,934	-8,692
<b>Cash flows from operating activities before changes in working capital</b>	<b>22,211</b>	<b>7,147</b>	<b>-59</b>	<b>280</b>	<b>22,271</b>	<b>6,868</b>
Cash flows from changes in working capital	-27,452	-10,229	362	-133	-27,814	-10,096
<b>Cash flows from operating activities</b>	<b>-5,241</b>	<b>-3,082</b>	<b>302</b>	<b>146</b>	<b>-5,543</b>	<b>-3,228</b>
Payments for investments in non-current assets	-6,346	-4,058	-15	-14	-6,330	-4,043
Payments for finance leases	-1,063	-1,222	0	0	-1,063	-1,222
Proceeds from the disposal of non-current assets	87	64	0	0	87	64
Payments for the acquisition of subsidiaries	-31,091	-75	0	0	-31,091	-75
Payments for purchase price components for companies not acquired in the fiscal year	-630	-6,708	0	0	-630	-6,708
Payments for the acquisition of assets and rights	0	-3,284	0	0	0	-3,284
Payments of loans to at-equity investments	-554	0	0	0	-554	0
Proceeds from the sale of subsidiaries	3,083	150	0	0	3,083	150
Decrease in cash and cash equivalents from the sale of subsidiaries with loss of control	-727	0	-727	0	0	0
Payments for the sale of subsidiaries with loss of control	0	-200	0	0	0	-200
Payments for non-current financial assets	-400	-400	0	0	-400	-400
<b>Cash flows from investing activities</b>	<b>-37,640</b>	<b>-15,733</b>	<b>0</b>	<b>-14</b>	<b>-36,898</b>	<b>-15,718</b>
Proceeds from capital increase	862	16,170	0	0	862	16,170
Repayment of borrower's note loan	0	-16,000	0	0	0	-16,000
Proceeds from bank loans	55,869	13,500	0	0	55,869	13,500
Repayment of bank loans	-349	-1,390	0	0	-349	-1,390
Cash flows from financing discontinued operations	0	0	0	-143	0	143
Interest received	173	172	0	0	173	172
Interest paid	-1,959	-3,740	0	0	-1,959	-3,740
Distributions	-4,914	-4,460	0	0	-4,914	-4,460
Balance of payments with non-controlling interests	-661	-1,338	0	0	-661	-1,338
<b>Cash flows from financing activities</b>	<b>49,021</b>	<b>2,915</b>	<b>0</b>	<b>-143</b>	<b>49,021</b>	<b>3,059</b>
<b>Total cash flows</b>	<b>6,140</b>	<b>-15,899</b>	<b>-440</b>	<b>-12</b>	<b>6,580</b>	<b>-15,887</b>
Changes in cash and cash equivalents due to exchange rate movements	316	-1,165	0	0	316	-1,165
<b>Total changes in cash and cash equivalents</b>	<b>6,456</b>	<b>-17,064</b>	<b>-440</b>	<b>-12</b>	<b>6,896</b>	<b>-17,053</b>
Cash and cash equivalents at the beginning of the period	41,350	71,774	440	188	40,910	71,587
Cash and cash equivalents at the end of the period	47,806	54,710	0	176	47,806	54,534

CONSOLIDATED STATEMENT OF CHANGES IN EQUITY OF ALLGEIER SE, MUNICH,  
IN ACCORDANCE WITH IFRS AS OF SEPTEMBER 30, 2018 (UNAUDITED)

CONSOLIDATED STATEMENT OF CHANGES IN EQUITY (in EUR thousand)												
	Issued capital	Capital reserves	Retained earnings	Treasury shares	Profit carryforward	Profit or loss for the period	Changes in equity recognized directly in equity (OCI)	Changes in equity recognized directly in equity (not OCI)	Equity interest of shareholders of the parent company	Equity interest of non-controlling interests	Equity	
<b>Balance on December 31, 2016</b>	<b>9,072</b>	<b>17,033</b>	<b>102</b>	<b>-1,379</b>	<b>68,689</b>	<b>4,442</b>	<b>11,904</b>	<b>-6,460</b>	<b>103,403</b>	<b>13,489</b>	<b>116,891</b>	
Transfer of profit or loss for the previous year to profit carryforward	0	0	0	0	4,442	-4,442	0	0	0	0	0	
Share options issued	0	17	0	0	0	0	0	0	17	0	17	
Actuarial gains (losses)	0	0	0	0	0	0	30	0	30	6	35	
Acquisition of shares of non-controlling shareholders of the GDE Group	0	0	0	0	0	0	0	-3,538	-3,538	3,538	0	
Capital increase	907	15,263	0	0	0	0	0	0	16,170	0	16,170	
Dividends	0	0	0	0	-4,460	0	0	0	-4,460	-1,038	-5,498	
Profit or loss for the period	0	0	0	0	0	3,681	0	0	3,681	1,437	5,118	
Foreign exchange differences	0	0	0	0	0	0	-6,849	0	-6,849	-1,668	-8,517	
<b>As of September 30, 2017</b>	<b>9,979</b>	<b>32,313</b>	<b>102</b>	<b>-1,379</b>	<b>68,671</b>	<b>3,681</b>	<b>5,085</b>	<b>-9,998</b>	<b>108,454</b>	<b>15,763</b>	<b>124,217</b>	
<b>Balance on December 31, 2017</b>	<b>9,979</b>	<b>32,214</b>	<b>102</b>	<b>-1,379</b>	<b>68,671</b>	<b>2,801</b>	<b>4,835</b>	<b>-9,989</b>	<b>107,234</b>	<b>15,611</b>	<b>122,845</b>	
Transfer of profit or loss for the previous year to profit carryforward	0	0	0	0	2,801	-2,801	0	0	0	0	0	
Adjustment of the exercise price of stock options from the 2010 stock option program	0	24	0	0	0	0	0	0	24	0	24	
Adjustment of the exercise price of stock options from the 2014 stock option program	0	318	0	0	0	0	0	0	318	0	318	
Exercise of stock options from the 2010 stock option program	90	772	0	0	0	0	0	0	862	0	862	
Actuarial gains (losses)	0	0	0	0	0	0	27	0	27	5	31	
Dividends	0	0	0	0	-4,914	0	0	0	-4,914	-661	-5,575	
Profit or loss for the period	0	0	0	0	0	8,049	0	0	8,049	2,258	10,306	
Non-controlling interests from the acquisition of iQuest	0	0	0	0	0	0	0	0	0	3,914	3,914	
Foreign exchange differences	0	0	0	0	0	0	-1,751	0	-1,751	-248	-1,999	
<b>As of September 30, 2018</b>	<b>10,069</b>	<b>33,328</b>	<b>102</b>	<b>-1,379</b>	<b>66,558</b>	<b>8,049</b>	<b>3,111</b>	<b>-9,989</b>	<b>109,849</b>	<b>20,878</b>	<b>130,727</b>	



## Other Notes

### Voluntary interim information

Since the *Transparenzrichtlinie-Änderungsrichtlinie-Umsetzungsgesetz* (TRL-ÄndRL-UmsG – German Act Implementing the Transparency Directive Amending Directive) became effective, the *Wertpapierhandelsgesetz* (WpHG – German Securities Trading Act) no longer requires mandatory quarterly interim reporting for companies listed in the General Standard. The Stock Exchange Regulations of December 3, 2015 of the Frankfurt Stock Exchange only stipulate a quarterly reporting requirement for Prime Standard companies. However, the company intends to continue providing information for shareholders and other stakeholders, and will therefore be publishing voluntary interim information until further notice. This publication is not a complete interim report in accordance with IFRS with the content required by law, but rather interim information published by the company focusing on the significant information.

### Accounting policies

The accounting policies have changed in the following respect compared to the consolidated financial statements as of December 31, 2017:

- The standard IFRS 15 Revenue from Contracts with Customers (effective date: January 1, 2018) was applied in the first three quarters of 2018. The application of IFRS 15 affects reporting in that contract costs and contractual assets are reported separately in the statement of financial position for the first time and that changes in inventories are aggregated with revenue in the income statement.

- The non-cash consideration previously included in other operating income, which represents an adjustment item for staff costs, will be netted within staff costs from the third quarter of 2018. The prior-year figures were restated to improve comparability. Non-staff costs amounted to EUR 1,606 thousand (previous year: EUR 1,397 thousand) in the first three quarters of 2018.
- The development of items attributable to OCI was shown in a separate column in the statement of changes in equity. Changes in equity that are not attributable to OCI were not included in this column, hence OCI can be reconciled from the start to the end of the period using this column.

Unless stated otherwise, amounts in the interim information are presented in thousands of euro. This interim information of Allgeier SE as of September 30, 2018 has not been reviewed by an auditor or audited in accordance with section 317 of the *Handelsgesetzbuch* (HGB – German Commercial Code).

### Number of shares

Options for 90,000 shares were exercised under the stock option program in the first three quarters of 2018. Accordingly, the total number of Allgeier SE shares outstanding increased from 9,978,649 on December 31, 2017 to 10,068,649 on September 30, 2018. Allgeier SE received a cash inflow of EUR 862 thousand from the exercise of these options.

The number of treasury shares held by Allgeier SE has not changed compared to December 31, 2017 in the first nine months of 2018. On September 30, 2018, Allgeier SE and one subsidiary continued to hold a total of 151,199 treasury shares, representing 1.5% of the share capital.

### Significant transactions with related parties in accordance with section 37w(4) sentence 2 WpHG and IAS 34.15B (j)

Initium AG, Munich, calculated a fixed fee of EUR 435 thousand for Management Board services in the first three quarters of 2018 (previous year: EUR 435 thousand). Furthermore, EUR 730 thousand was recognized as a provision for the variable component of Management Board remuneration.

At the subsidiary accounted for using the equity method, Talentry GmbH, Munich, a loan initially granted in the amount of EUR 530 thousand, plus incurred interest of EUR 14 thousand, was converted into equity as the result of a change in the shareholder structure and the associated capital increase of EUR 24,365 in total. Allgeier Beteiligungen GmbH participated in the capital increase only to a minor extent, acquiring 2,838 shares. Its interest in the company was therefore diluted from 40.81% to 33.34%. The Allgeier Group purchased services amounting to EUR 11 thousand in the reporting period.

Business relationships between all companies included in the consolidated financial statements were fully eliminated in the consolidated financial statements.

### Dividend

At the Annual General Meeting held on June 29, 2018, Allgeier SE resolved to pay a dividend of EUR 4,913,725 in total from its net retained profits for fiscal 2017 of EUR 27,188,374.41. There were 9,827,450 shares entitled to a dividend of EUR 0.50 per share. The dividend was paid to Allgeier SE's shareholders in July 2018.

### Basis of consolidation

In the first three quarters of 2018, the number of consolidated companies in the Allgeier Group increased by 16 from 69 on December 31, 2017 to 85 on September 30, 2018. There is also still the one company accounted for using the equity method, Talentry GmbH, Munich. The Group acquired 17 new companies and also sold two companies in the first nine months of 2018. Furthermore, Nagarro founded new subsidiaries in Malta, South Africa, and the United Arab Emirates in the reporting period. Moreover, two companies were merged with other companies of the Allgeier Group.

The acquired companies are ANECON Software Design und Beratung GmbH, Vienna, Austria, Objectiva Software Solutions, Inc. San Diego, California, USA, iQuest Holding GmbH, Bad Homburg v. d. Höhe, Germany each including subsidiaries, and consecra GmbH, Offenburg, Germany.

In January 2018, Nagarro Austria Beteiligungs GmbH, Vienna, Austria, acquired all shares in ANECON Software Design und Beratung GmbH, Vienna, Austria ("ANECON"). In turn, ANECON holds all shares in ANECON Software Design und Beratung GmbH, Dresden.

In March 2018, Allgeier Enterprise Services AG, Bremen, sold all shares in Allgeier Medical IT GmbH, Freiburg, Germany, including its subsidiary eHealthOpen Ltd., Birmingham, UK. A purchase price of EUR 3.5 million was agreed for the company. The disposal resulted in the derecognition of net assets of EUR 1.0 million. Furthermore, costs of EUR 0.6 million were incurred for the sale, resulting in a gain on disposal of EUR 1.9 million before income taxes. Allgeier Medical IT generated revenue of EUR 3.5 million and earnings before taxes of EUR 0.5 million in fiscal 2017. The purchase price for Allgeier Medical was settled in the first half of 2018.

In June 2018, Allgeier Project Solutions GmbH acquired 100% of shares in Objectiva Software Solutions, Inc., San Diego, California, USA ("Objectiva"). The company has two subsidiaries in Beijing and Xian, China. Objectiva generated revenue of USD 24.1 million, adjusted operating EBITDA of USD 1.9 million and earnings before taxes of USD 1.2 million in fiscal 2017.

Allgeier SE signed a purchase agreement to acquire around 67% of the shares in the software development company iQuest Holding GmbH, Bad Homburg, Germany, in August 2018. The company has subsidiaries in Romania, Poland, Germany, and Switzerland. The iQuest Group generated revenue of EUR 32.3 million, adjusted operating EBITDA of EUR 4.3 million and earnings before taxes of EUR 2.5 million in fiscal 2017.

Allgeier One AG, Munich, acquired all shares in consecra GmbH, Offenburg ("consecra") in August 2018. consecra generated revenue of EUR 0.6 million and earnings before taxes of EUR 7 million in fiscal 2017.

All companies included in consolidation for the first time have been included in the interim report on a provisional basis.

## Legal Notice

This interim information of Allgeier SE as of September 30, 2018 possibly contains forward-looking statements that are based on assumptions and estimates made by the management of Allgeier SE. While management believes that these assumptions and estimates are accurate, actual future developments and results could differ significantly from these assumptions and estimates owing to a variety of factors. These factors include, for example, changes in the general economic situation, exchange rates, interest rates, and changes in market trends and the competitive situation. Allgeier SE provides no guarantee that future developments and the actual results achieved in the future will be consistent with the assumptions and estimates expressed in this interim information and assumes no such liability.

# Financial Calendar 2018

IMPORTANT DATES AND EVENTS	Date
Publication of the 2017 consolidated/annual financial statements	April 27, 2018
Publication of the interim report as of March 31, 2018	May 15, 2018
Annual General Meeting in Munich	June 29, 2018
Publication of 2018 half-yearly financial report	August 30, 2018
Publication of the interim report as of September 30, 2018	November 14, 2018

## About this Publication

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Allgeier's financial and interim reports can be found on the Internet at [www.allgeier.com/en](http://www.allgeier.com/en) > Investor Relations > Financial Reports & Publications or requested using the contact details above.

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