

Mexico City, October 21, 2026

Grupo Rotoplas S.A.B. de C.V. (BMV: AGUA*) ("Rotoplas", "the Company"), the leading provider of water solutions in the Americas, today reports its unaudited financial results for the third quarter of 2026. The information has been prepared in accordance with International Financial Reporting Standards (IFRS).

Figures are expressed in millions of Mexican pesos.

Key Highlights Q3'26

- **Net sales** were \$2.9 billion, a 9.6% increase compared to Q3'25. On a cumulative basis, **net sales** reached \$8.6 billion, a 4.6% increase compared to 2025.
- **EBITDA** was \$385 million, a 35.4% increase compared to Q3'25, with a 13.2% margin. The **cumulative EBITDA** was \$1.1 billion, an 18.1% increase year-over-year, with a cumulative margin of 13.1%.
- **Operating income** was \$192 million, an increase of 50.7% compared to Q3'25. On a cumulative basis, **operating income** reached \$569 million, a 20.3% increase compared to 2025.
- **Net result** posted a \$2 million loss in Q3'26, an improvement from the \$198 million loss in Q3'25, mainly due to higher operating income and a lower net financing cost. In the first nine months of the year, **net result** posted a loss of \$91 million.
- **Services** sales increased 10.3% during the quarter and 9.3% in the first nine months of the year, primarily driven by *bebbia*, while **product** sales increased 9.5% during the quarter and 4.1% in the first nine months of the year.
- **bebbia** surpassed 208,000 active subscribers at the end of the quarter.

Message from the CEO | Carlos Rojas Aboumrad

"During the third quarter, the improvement in our results continued, with stronger growth in both sales and EBITDA in an environment that remains challenging. Sales grew 9.6% and EBITDA 35.4%, with a 13.2% margin, 250 basis points above Q3'25. These results reflect disciplined execution amid pressure from resin costs and weak demand in some of our markets.

Our diversification across geographies, businesses and solutions continues to contribute. In Mexico, sales grew 4.8% and the EBITDA margin expanded 250 basis points to 17.8%. In Argentina, operational stabilization continued despite very low demand. The United States grew double digits and posted its sixth consecutive quarter of positive EBITDA, and Peru, Central America and Brazil delivered double-digit growth. Together, the United States and Other Countries now represent 27% of total sales, compared to 24% in Q3'25. New strategic solutions reached close to 8% of Group sales, and services grew 10.3%, driven by bebbia, which added more than 14,000 net new active subscribers, its highest quarterly figure to date.

We maintained financial discipline. Net Debt / EBITDA closed at 2.2x, compared to 3.2x in Q3'25, reflecting higher EBITDA, lower net financial debt and a stronger cash position. In the first nine months, operating cash flow grew 16.8% and CapEx was 10.3% lower than in 2025. Reducing leverage remains a priority, and cash generation will remain at the center of our decisions.

Our purpose is to bring more and better water to people, and innovation has always been the driving force that makes this possible. Guided by this purpose, we will continue to innovate, strengthen our leadership, and create sustainable long-term value for all our stakeholders."

Results

Figures are expressed in millions of Mexican pesos

Indicator	Q3'26	Q3'25	%YoY	9M26	9M25	%YoY
Net Sales	2,927	2,671	9.6%	8,631	8,251	4.6%
Adjusted EBITDA ¹	385	285	35.4%	1,126	954	18.1%
% margin	13.2%	10.7%	250 bps	13.1%	11.6%	150 bps
Net Result	(2)	(198)	NM	(91)	(133)	NM
ROIC ²	5.5%	5.8%	(30) bps			
Net Financial Debt ³	3,289	3,789	(13.2%)			
Net Debt / EBITDA ²	2.2x	3.2x	(1.0x)			

Financial Results Q3'26 vs Q3'25

- **Net sales** reached \$2,927 million, a 9.6% increase compared to Q3'25, driven by a 9.5% growth in products and 10.3% in services. All regions grew during the quarter, led by Other Countries and the United States.
- **Gross profit** closed at \$1,206 million with a margin of 41.2%, a 60-basis-point contraction compared to Q3'25, mainly due to higher resin costs.
- **Operating income** reached \$192 million, a 50.7% increase compared to Q3'25. Operating expenses grew 2.6%, below the 9.6% growth in sales, representing 34.7% of sales compared to 37.0% in Q3'25.
- **EBITDA** closed at \$385 million with a 13.2% margin, a 250-basis-point expansion compared to Q3'25, as lower relative expenses more than offset the decline in gross margin.

¹ In 2026, Adjusted EBITDA for the quarter includes \$5 million in donations, and \$25 million on a cumulative basis. By comparison, in 2025, \$0.1 million was considered in the quarter and \$2.2 million on a cumulative basis for the same period.

² As reported in the Q3'25 earnings release, the LTM NOPAT and EBITDA calculation for Q3'25 does not include the post-closing 2024 adjustment related to Argentina's results. Considering this adjustment, Q3'25 ROIC based on audited figures would be 3.4% and leverage (Net Financial Debt / EBITDA) would stand at 3.7x.

³ Excluding leases.

- **Net result** was a loss of \$2 million, compared to a loss of \$198 million in Q3'25. In addition to higher operating income, net financing cost decreased to \$164 million from \$354 million, mainly due to lower foreign exchange effects in Argentina.
- **Net Financial Debt / EBITDA** leverage closed at 2.2x, improving from 3.2x in Q3'25, driven by higher EBITDA, higher cash balances and lower debt.

Cumulative Results 2026 vs 2025

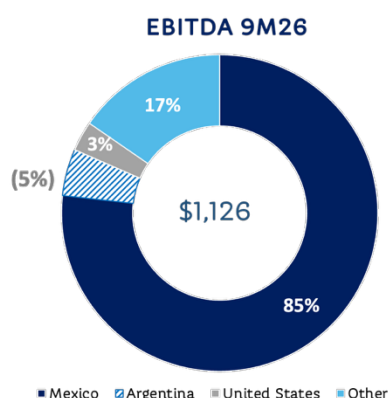
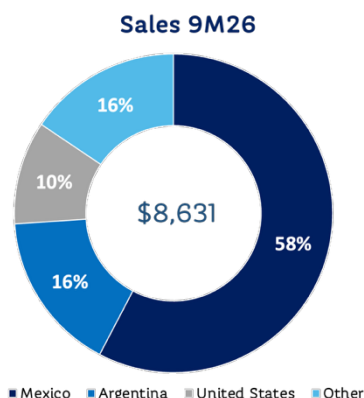
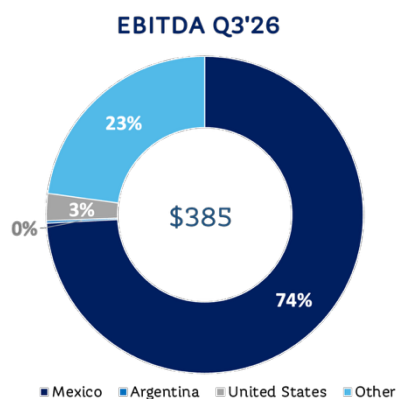
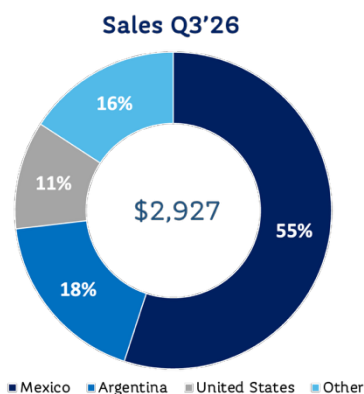
- **Net sales** reached \$8,631 million, a 4.6% increase compared to 2025, driven by a 4.1% growth in products and 9.3% growth in services, the latter primarily supported by *bebbia*. Growth in Other Countries, Mexico and the United States more than offset the decline in Argentina.
- **Gross profit** was \$3,621 million, a 5.0% increase year-over-year, while **gross margin** expanded 20 basis points to 42.0%, supported by an agile pricing strategy to protect margins amid volatile raw material costs.
- **Operating income** reached \$569 million, a 20.3% increase year-over-year, with operating expenses growing 2.5%, below revenue growth, reflecting operating leverage.
- **EBITDA** closed at \$1,126 million, with **EBITDA margin** expanding 150 basis points to 13.1%. The improvement came mainly from Mexico and from Argentina narrowing its losses year-over-year, as well as from the United States.
- **Net result** recorded a \$91 million loss, compared to a \$133 million loss in 2025. Higher operating income and lower net financing costs were partially offset by a higher tax provision.
- **CapEx** for the period amounted to \$317 million, a 10.3% decrease year-over-year. Investments remained focused on Mexico, mainly in the services segment.

Sales and EBITDA by Geography and Solution

Figures are expressed in millions of Mexican pesos

Sales	Q3'26	Q3'25	%YoY	9M26	9M25	%YoY
Mexico ⁴	1,610	1,536	4.8%	4,978	4,784	4.1%
Argentina	531	497	6.8%	1,404	1,498	(6.3%)
United States	323	267	20.9%	904	862	4.9%
Other	463	370	25.1%	1,345	1,107	21.6%
Products	2,615	2,388	9.5%	7,733	7,429	4.1%
Services	312	283	10.3%	898	822	9.3%
EBITDA	Q3'26	Q3'25	%YoY	9M26	9M25	%YoY
Mexico	286	236	21.3%	956	849	12.6%
Argentina	1	(40)	NM	(60)	(104)	NM
United States	11	15	(27.0%)	38	21	82.6%
Other	88	74	18.8%	192	188	2.3%
Products	381	348	9.6%	1,238	1,071	15.6%
Services	4	(63)	NM	(112)	(117)	NM
EBITDA Margin	Q3'26	Q3'25	%YoY	9M26	9M25	%YoY
Mexico	17.8%	15.3%	250 bps	19.2%	17.8%	140 bps
Argentina	0.2%	(8.0%)	NM	(4.2%)	(6.9%)	270 bps
United States	3.3%	5.5%	(220) bps	4.2%	2.4%	180 bps
Other	19.0%	20.0%	(100) bps	14.3%	16.9%	(260) bps
Products	14.6%	14.6%	0 bps	16.0%	14.4%	160 bps
Services	1.3%	(22.4%)	NM	(12.5%)	(14.3%)	180 bps

⁴ Includes revenue and EBITDA from the Mexico business, even when a specific project is carried out in another country.



Mexico

- **Sales** increased 4.8% during the quarter and 4.1% on a cumulative basis. New strategic solutions, such as vertical tanks and rainwater harvesting systems, together with the services platform, supported growth in a market that remained weak, affected by low consumer confidence, slower vertical construction and heavy rains.
- **EBITDA** reached \$286 million in the quarter, a 21.3% increase year-over-year, with a margin of 17.8%, 250 basis points above Q3'25. Lower expenses as a percentage of sales more than offset higher resin costs. On a cumulative basis, EBITDA reached \$956 million, a 12.6% increase, with a margin of 19.2%, a 140-basis-point expansion.

Argentina

- **Sales** increased 6.8% in Mexican pesos and 24% in local currency during the quarter, driven mainly by pricing, as storage and flow volumes declined amid weak construction activity. On a cumulative basis, sales decreased 6.3% in Mexican pesos and grew 29% in local currency.
- **EBITDA** reached break-even in the quarter, compared to a loss in Q3'25, supported by the pricing strategy and operational stabilization initiatives. On a cumulative basis, EBITDA losses narrowed compared to 2025, with the EBITDA margin, while still negative, improving 270 basis points.

Note: Argentina's results are reported under IAS 29 (Financial Reporting in Hyperinflationary Economies). Quarterly figures are derived from year-to-date results restated to September purchasing power and closing exchange rate, less previously reported figures. Q3'26 sales include a positive effect of approximately \$22 million Mexican pesos from this restatement; excluding it, sales would have been approximately \$509 million and EBITDA would have remained at break-even. On a cumulative basis, the restatement had a negative effect of approximately \$17 million on 9M26 sales, which would have been approximately \$1,420 million excluding it, while EBITDA would have remained at a loss of approximately \$60 million.

United States

- **Sales** grew 20.9% during the quarter and 4.9% on a cumulative basis in Mexican pesos, and approximately 31% and 18% in USD, respectively. Growth reflected the vertical-focused commercial strategy, with higher demand in water storage and in the industrial and chemical segments.
- **EBITDA** was positive for the sixth consecutive quarter, with a margin of 3.3%, compared to 5.5% in Q3'25, reflecting a commercial strategy focused on accelerating growth and gaining new accounts. On a cumulative basis, the EBITDA margin expanded 180 basis points to 4.2%.

Other Countries

(Peru, Central America and Brazil)

- **Sales** increased 25.1% in Q3'26 and 21.6% in the first nine months of the year, driven by Peru and Central America, and by Brazil, where the water treatment plant business continues to develop and expand.

In **Peru**, sales posted double-digit growth, supported by improved consumer and investment sentiment. Warmer-than-usual temperatures associated with El Niño weighed on water heater sales but boosted demand for storage solutions.

Central America continued to grow at a strong double-digit pace, with solid performance across the region. In **Brazil**, the water treatment plant business is gaining traction.

- **EBITDA** increased 18.8% in the quarter and 2.3% on a cumulative basis. The margin was 19.0%, a 100-basis-point contraction compared to Q3'25, reflecting the timing of project execution in Brazil. The cumulative figure includes the one-time impact of the litigation settlement in Brazil reported last quarter.

Products

- Product **sales** increased 9.5% during the third quarter, with growth in all regions, and 4.1% on a cumulative basis, with growth in all regions except Argentina, which declined in Mexican pesos amid weak construction activity.
- **EBITDA** increased 9.6% during the quarter, with a stable margin of 14.6%, supported by better results in Mexico, Argentina and Peru. On a cumulative basis, EBITDA grew 15.6% and the margin expanded 160 basis points to 16.0%.

Services

- Services **sales** increased 10.3% during the third quarter and 9.3% on a cumulative basis. bebbia closed September with more than 208,000 subscribers, while the water treatment plants business grew in Mexico and Brazil.
- **EBITDA** was positive at \$4 million, compared to a loss of \$63 million in Q3'25, mainly due to improved unit economics at bebbia. On a cumulative basis, and excluding the one-time impact of the litigation settlement in Brazil reported last quarter, services EBITDA would have been negative \$37 million. The result has improved every quarter this year, driven mainly by bebbia.

Other Indicators

(Figures are expressed in millions of Mexican pesos)

Indicators	9M26	9M25	%YoY
Cash and Cash Equivalents	1,074	802	33.9%
Short Term Financial Debt ⁵	407	592	(31.2%)
Long Term Financial Debt ⁶	3,956	3,999	(1.1%)
Total Financial Debt	4,363	4,591	(5.0%)
Net Financial Debt	3,289	3,789	(13.2%)
CapEx	317	353	(10.3%)
Mexico	288	305	(5.5%)
Argentina	11	14	(22.2%)
United States	3	0	NM
Other	15	34	(55.8%)
Change in Working Capital (cash flow)	(194)	127	NM
CCC ⁷ (days)	12	43	(31) days
Net Financing Cost	(467)	(625)	(25.2%)

CapEx

- **Capital expenditures** totaled \$317 million, representing 3.7% of sales for the first nine months of the year, a 10.3% decrease year-over-year. Investment remained concentrated in Mexico, mainly in the services segment, consistent with the Company's disciplined approach to capital allocation and its focus on cash generation.

Net Financing Cost

- **Net financing cost** recorded for the third quarter an expense of \$164 million, compared to \$354 million in Q3'25. The 2026 expense includes \$121 million in interest, commissions, and leases, and \$43 million from foreign exchange, inflation and financial instrument valuation effects, mainly related to Argentina.

⁵ Excluding leases. Short-term debt for Q3'25 includes \$101 million in interest provisions related to the AGUA 17-2X Sustainable Bond, which was prepaid in Q2'26.

⁶ Excluding leases.

⁷ CCC = (Average Inventory / (3M Cost of Sales / 90)) + (Average Trade Receivables and Other Accounts Receivable / (3M Net Sales / 90)) - (Average Suppliers and Other Short-term Accounts Payable / (3M Cost of Sales / 90)). Averages are calculated using the beginning and ending balances of the quarter.

- The **cumulative net financing cost** recorded an expense of \$467 million, compared to \$625 million in 2025. The 2026 expense includes \$384 million for interest, commissions, and leases, and \$83 million from foreign exchange, inflation and financial instrument valuation effects, including the impact of exchange rate movements and inflation in Argentina.

Derivative Financial Instruments

- As of September 30, 2026, the market value of Grupo Rotoplas' positions was:

		Market Value
Instrument	Interest rate swap	\$28.36 million
	MXN/USD exchange rate forward	\$0.34 million

Sustainability Strategy Milestones

- **Mexico's Most Responsible Companies - *Expansión***
Rotoplas was recognized by *Expansión* magazine as one of Mexico's 10 most responsible companies, ranking #9 out of 183 participants.
- **Water-Responsible Company - Peru**
For the third consecutive year, Rotoplas Peru received the Water-Responsible Company distinction (*Empresa Hídricamente Responsable*), an Aquafondo initiative that recognizes companies carrying out responsible water management projects in their operations.
- **Habitat for Humanity - Argentina**
In August and September, Rotoplas Argentina partnered with Habitat for Humanity to deliver sanitation kits to 20 families in local communities, complemented by training from technical advisors.
- **Transcend - Women with Impact**
Rotoplas launched the second edition of "Trasciende, mujeres con impacto", an internal talent development program for women employees in mid-level roles. This edition brings together 39 participants from Mexico, Nicaragua, Peru and Argentina, and includes training courses and team-building activities that will run through the end of 2026.

Analyst Coverage

Institution	Analyst	Recommendation	Target Price (MXN)
BTG Pactual	Gordon Lee	<i>Neutral</i>	\$15.30
GBM	Regina Carrillo	<i>Outperform</i>	\$39.00
Punto Research	Pablo Quiroz	<i>Hold</i>	\$14.40
Consensus			\$22.90

Investor Conference Call Invite

Thursday, October 22, 2026, at 10:00 a.m. Mexico City time (12:00 p.m. ET)

Speakers: Carlos Rojas (Chief Executive Officer), Andrés Pliego (Chief Financial Officer)

Registration: https://rotoplas.zoom.us/webinar/register/WN_RMRpJbl4RBqmsn_S5jF3-A#/registration

Financial Statements

Income Statement

(Unaudited figures in millions of Mexican pesos)

	Q3			9M		
	2026	2025	%Δ	2026	2025	%Δ
Net Sales	2,927	2,671	9.6%	8,631	8,251	4.6%
COGS	1,721	1,555	10.7%	5,010	4,802	4.3%
Gross Profit	1,206	1,116	8.1%	3,621	3,449	5.0%
% margin	41.2%	41.8%	(60) bps	42.0%	41.8%	20 bps
Operating Expenses	1,014	989	2.6%	3,052	2,976	2.5%
Operating Income	192	127	50.7%	569	473	20.3%
% margin	6.5%	4.8%	170 bps	6.6%	5.7%	90 bps
Net Financing Cost	(164)	(354)	(53.6%)	(467)	(625)	(25.2%)
Financial Income	60	15	NM	236	48	NM
Financial Expenses	(224)	(369)	(39.4%)	(703)	(673)	4.5%
Income Before Taxes	28	(227)	NM	102	(153)	NM
Taxes	30	(29)	NM	193	(20)	NM
Net Result	(2)	(198)	NM	(91)	(133)	NM
% margin	(0.1%)	(7.4%)	730 bps	(1.1%)	(1.6%)	50 bps
Adjusted EBITDA ⁸	385	285	35.4%	1,126	954	18.1%
% margin	13.2%	10.7%	250 bps	13.1%	11.6%	150 bps

⁸ In 2026, Adjusted EBITDA for the quarter includes \$5 million in donations, and \$25 million on a cumulative basis. By comparison, in 2025, \$0.1 million was considered in the quarter and \$2.2 million on a cumulative basis for the same period.

Balance Sheet

(Unaudited figures in millions of Mexican pesos)

	9M		%Δ
	2026	2025	
Cash and Cash Equivalents	1,074	802	33.9%
Accounts Receivable	1,339	1,588	(15.7%)
Inventory	1,728	1,369	26.3%
Other Current Assets	470	498	(5.7%)
Current Assets	4,611	4,257	8.3%
Property, Plant and Equipment - Net	3,584	3,839	(6.6%)
Other Long-term Assets	5,473	5,765	(5.1%)
Total Assets	13,667	13,860	(1.4%)
Short-term Financial Debt ⁹	407	592	(31.2%)
Suppliers	1,446	968	49.3%
Other Accounts Payable	1,196	1,082	10.6%
Short-term Liabilities	3,049	2,642	15.4%
Long-term Financial Debt ¹⁰	3,956	3,999	(1.1%)
Other long-term Liabilities	1,133	1,235	(8.2%)
Total Liabilities	8,137	7,876	3.3%
Total Stockholders' Equity	5,530	5,985	(7.6%)
Total Liabilities + Stockholders' Equity	13,667	13,860	(1.4%)

⁹ Excluding leases.

¹⁰ Excluding leases.

Cash Flow

(Unaudited figures in millions of Mexican pesos)

	9M		%Δ
	2026	2025	
EBIT	569	473	20.3%
Depreciation and Amortization	532	479	11.2%
Inventory	(460)	207	NM
Accounts Receivable	(279)	95	NM
Accounts Payable	544	(174)	NM
Other Current Assets and Liabilities	439	45	NM
Taxes	(155)	(104)	49.1%
Operating Cash Flow	1,191	1,020	16.8%
CapEx	(317)	(353)	(10.3%)
Other Investment Activities	44	66	(32.5%)
Investing Cash Flow	(273)	(288)	(5.2%)
Dividends / Capital Reimbursements	(82)	(121)	(32.5%)
Repurchase Fund	(47)	(13)	NM
Short and Long-term Debt	(61)	(178)	(65.8%)
Interest and Leases	(514)	(407)	26.3%
Financing Cash Flow	(704)	(718)	(2.0%)
Change in Cash	215	13	NM
Effect of exchange rate on cash	(2)	57	NM
Net Change in Cash	212	70	NM
Initial Cash Balance	861	732	17.7%
Final Cash Balance	1,074	802	33.9%

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Disclaimer

This document may contain forward-looking statements regarding the future performance of Grupo Rotoplas S.A.B. de C.V. These statements are based on current management expectations and information available at the time of publication. Actual results may differ materially due to various risks, uncertainties, and external factors beyond the Company's control. Grupo Rotoplas assumes no obligation to update or revise any forward-looking statements.

About the Company

Grupo Rotoplas S.A.B. de C.V. is the leading provider of water solutions in the Americas, including products and services for storing, piping, improving, treating, and recycling water. With over 45 years of experience in the industry and 18 plants throughout the Americas, Rotoplas is present in 14 countries and has a portfolio that includes 27 product lines, a services platform, and an e-commerce business. Grupo Rotoplas has been listed on the Mexican Stock Exchange (BMV) under the ticker "AGUA" since December 10th, 2014.

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