BiZiM

Toptan Satış Mağazaları

2026 2nd Quarter Webcast Presentation

August 18th ’2026

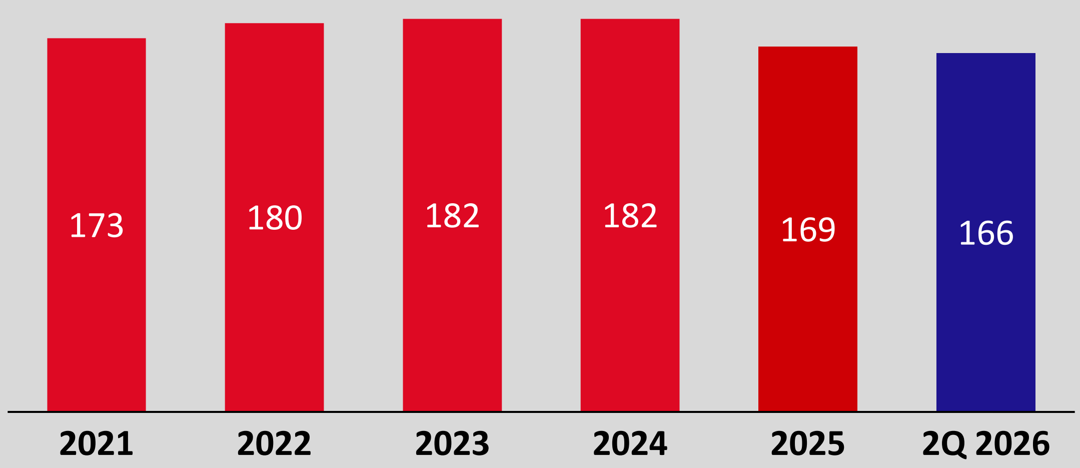
YILDIZ HOLDING

2Q2026 at a Glance

GROSS MARGIN	OPEX	EBITDA MARGIN
2Q2026 vs 2Q2025 **From 16.4% to 15.8%** **-60 bps**	**2Q2026 vs 2Q2025** Decreased by **15.6%**	**2Q2026 vs 2Q2025** **From 3.3% to 3.1%** **-20 bps**
(Including TAS 29)	(Including TAS 29)	(Including TAS 29)

- **Gross Margin continued to be strong**
- **Positive results of opex mitigative initiatives**
  - Focus on cost efficiency continued
  - Total OPEX decreased by 15.6%
- **Net loss was diminished by 54%**

Bizim Toptan's Store Number Development



- «Bizim Gross» format in 9 stores continued by the end of 2Q2026.
  - *1 new «Bizim Gross» store opened in Hatay*
  - *1 existing store converted to «Bizim Gross» in Darıca*
- Merged 3 of the existing stores with the existing Bizim Gross stores
- Closed the quarter with 166 stores in total
- 1 of the warehouse was closed for increasing efficiency and operations moved to other 13 ones.

Franchising System seç Shopkeeper friendly business model

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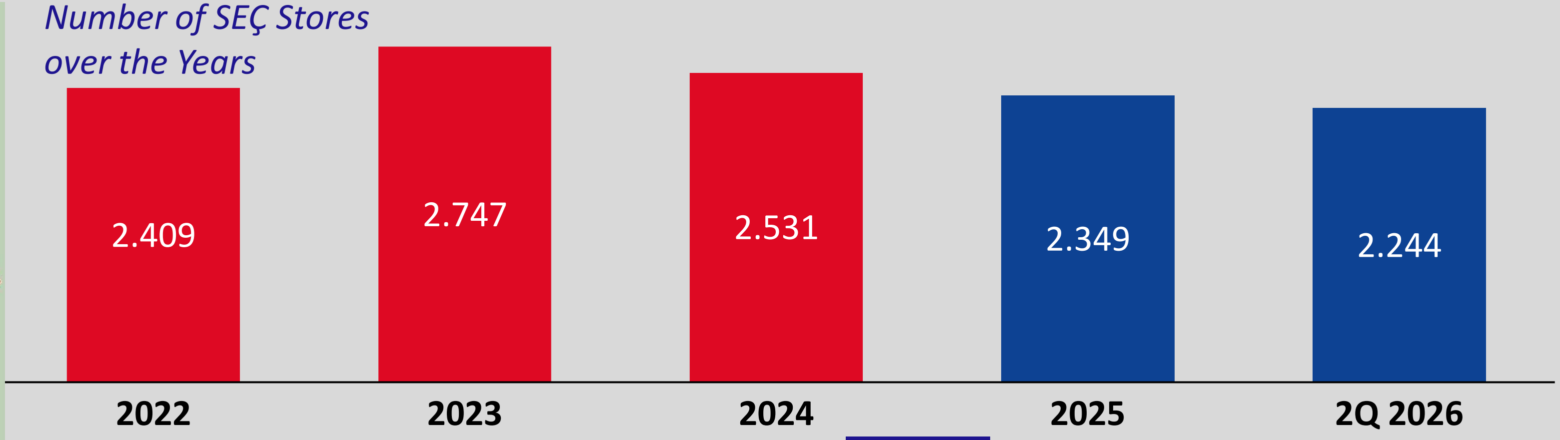
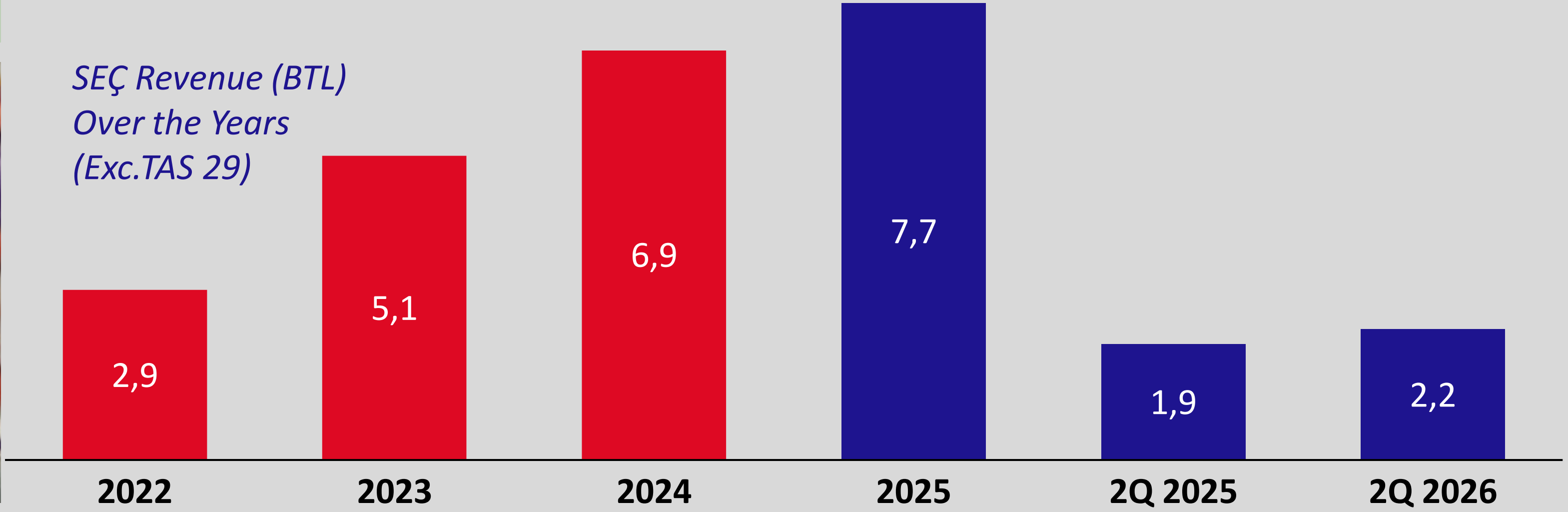
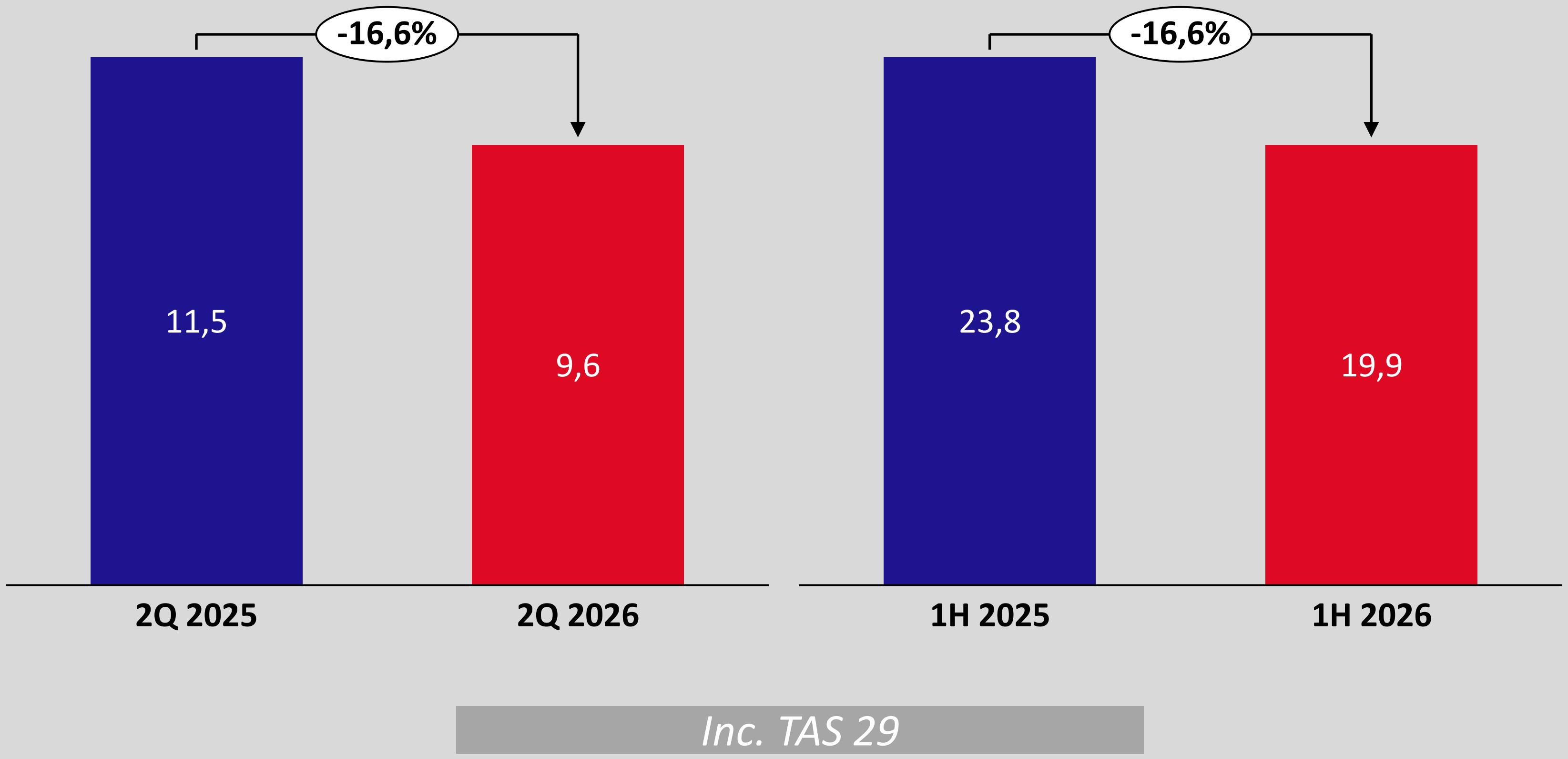




Total store number decreased by 35 in net during Q2’26 compared to last quarter. Market dynamics and economic reasons continued to force franchisees to go out of the market. However, new franchisees’ sales were fourfold of closed ones. Also main category sales per franchisee increased by 32% in Q2026 vs 2Q2025.*

** Indicates Exc TAS29*

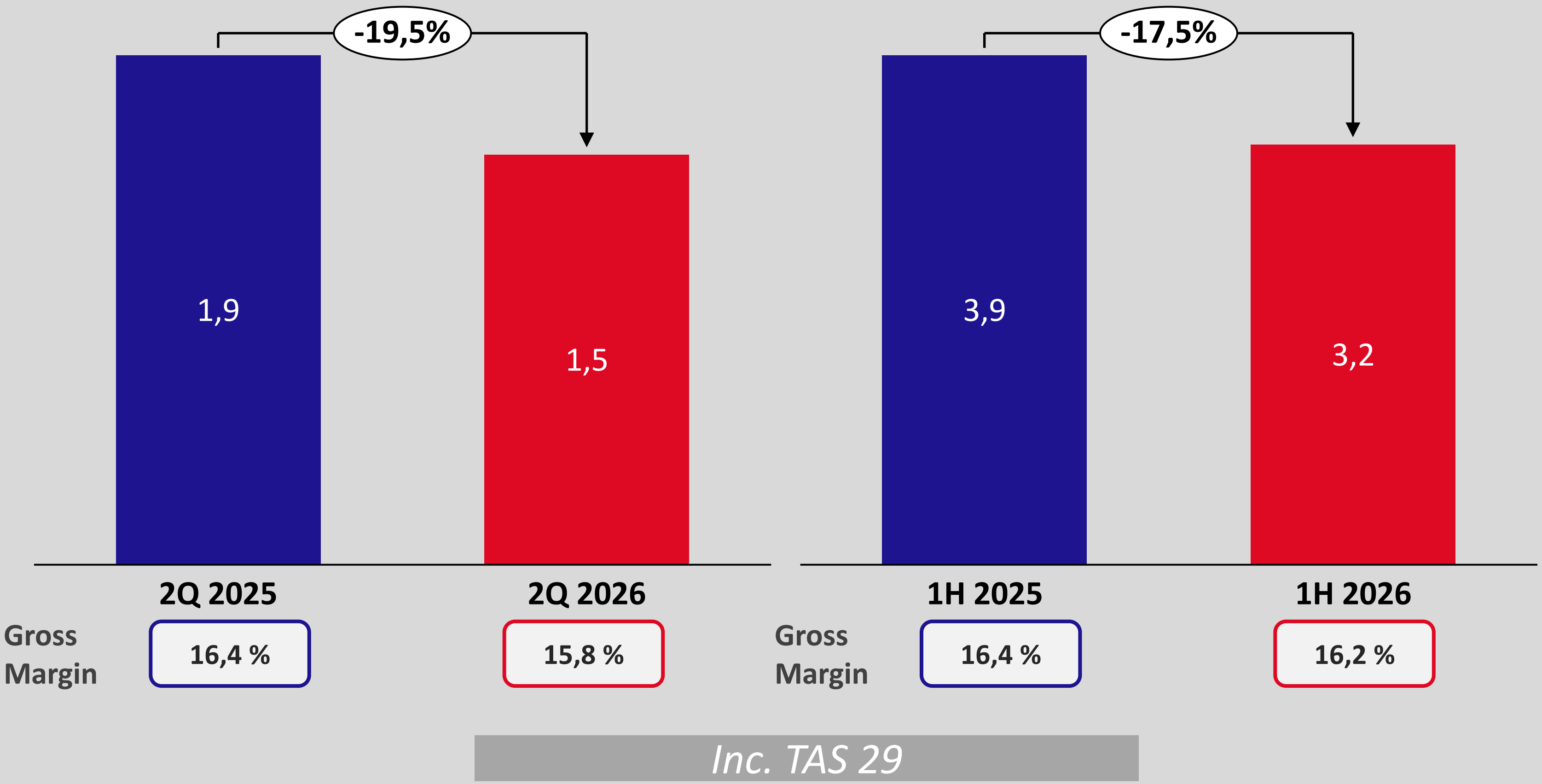
Sales (BTL) Q2'26 & 1H'26 / Consolidated



Macro-economic conditions and high competition in the market continued to be the major drivers of sales performance

Low inflation basket continued to shadowed the sales performance after TAS

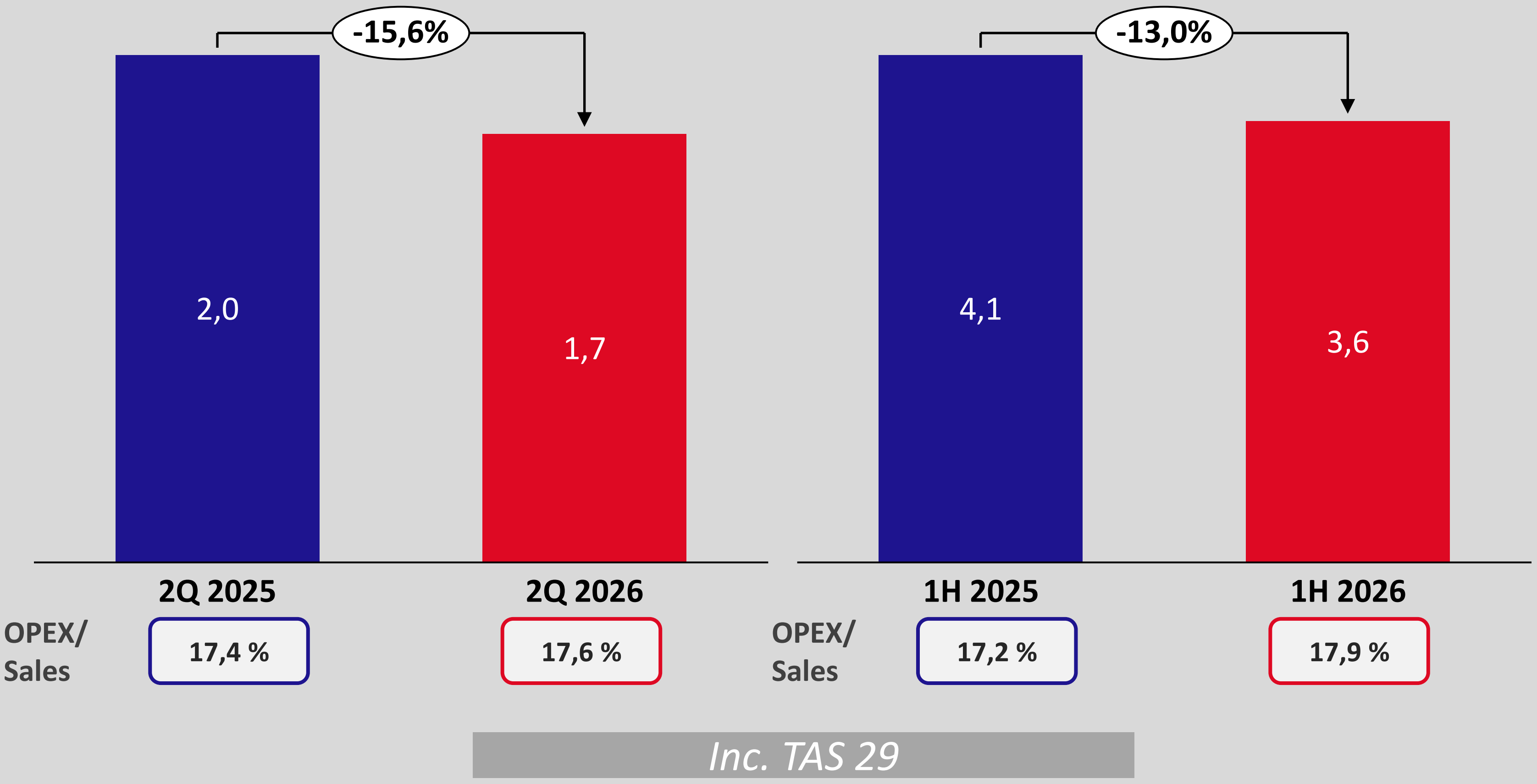
Gross Profit (BTL) Q2'26 & 1H'26 / Consolidated



Gross margins continued to be strong however high competition caused minor deteriorations on margins

Gross margin was 15,8% in Q2 and 16,2% in H1

Operating Expenses (BTL) Q2'26 & 1H'26 / Consolidated



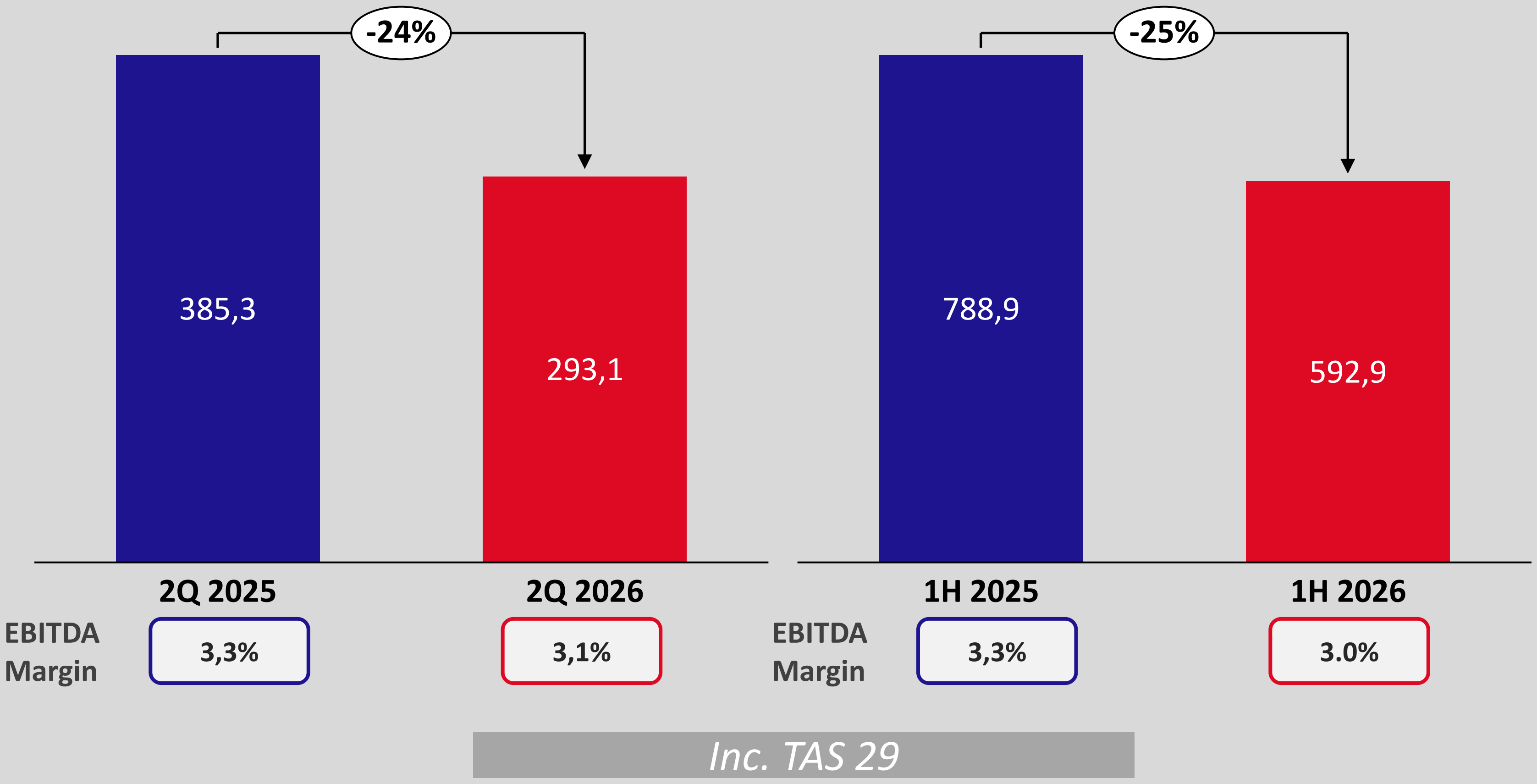
OPEX control is on track

Initiatives which continues since 2H24 showed efficiency in nominal OPEX figures

15,6% OPEX decrease in Q2'26 versus Q2'25 & 13,0% decrease in 1H'26 versus 1H'25

OPEX/sales ratio was affected from limited sales growth

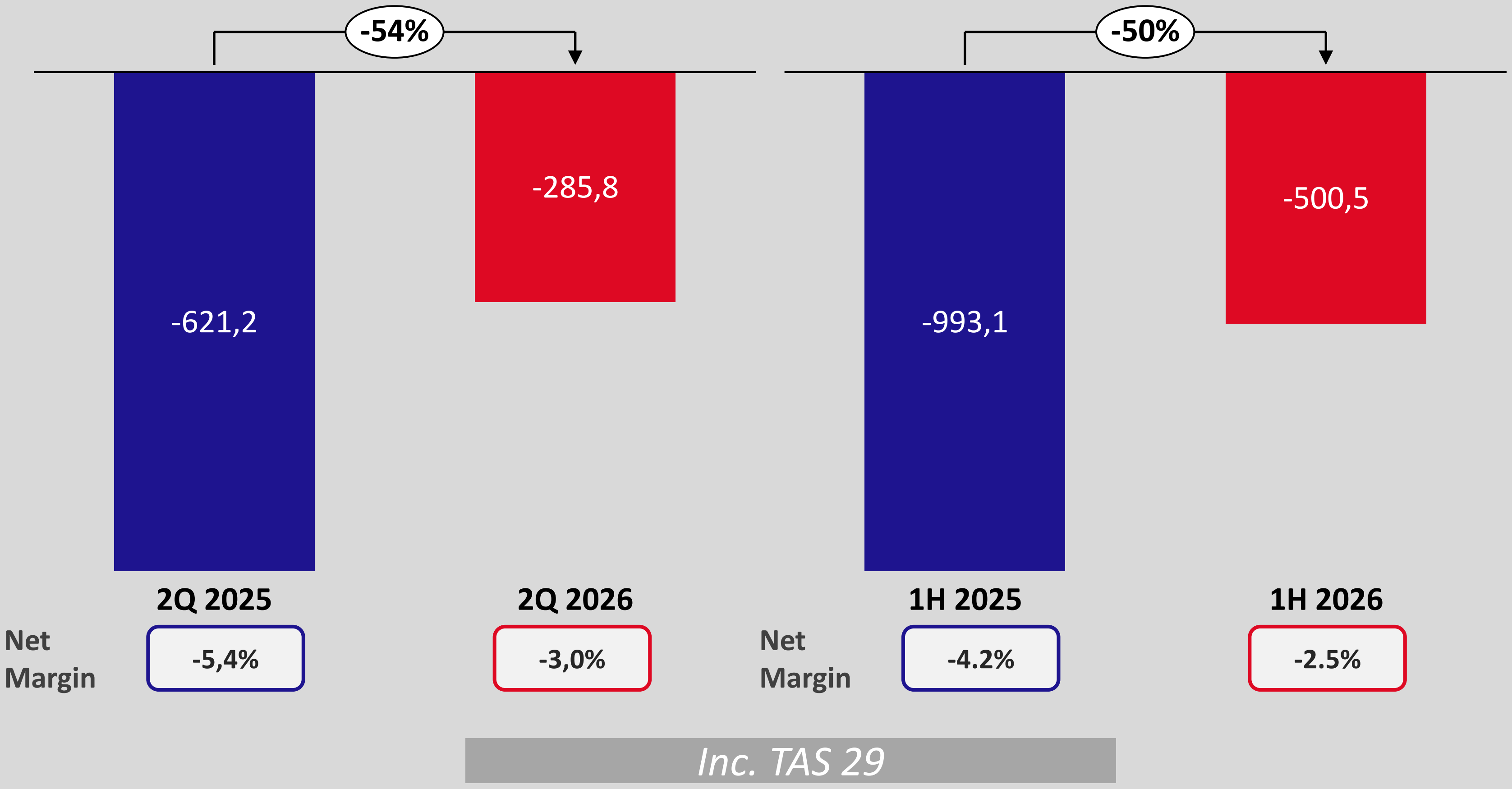
EBITDA (MTL) Q2’26 & 1H’26 / Consolidated



Thanks to controlled OPEX, EBITDA margin continued to stay strong

Expected sales increase and mix improvement will support EBITDA levels & margins.

Net Income/Loss Q2'26 & 1H'26 / Consolidated

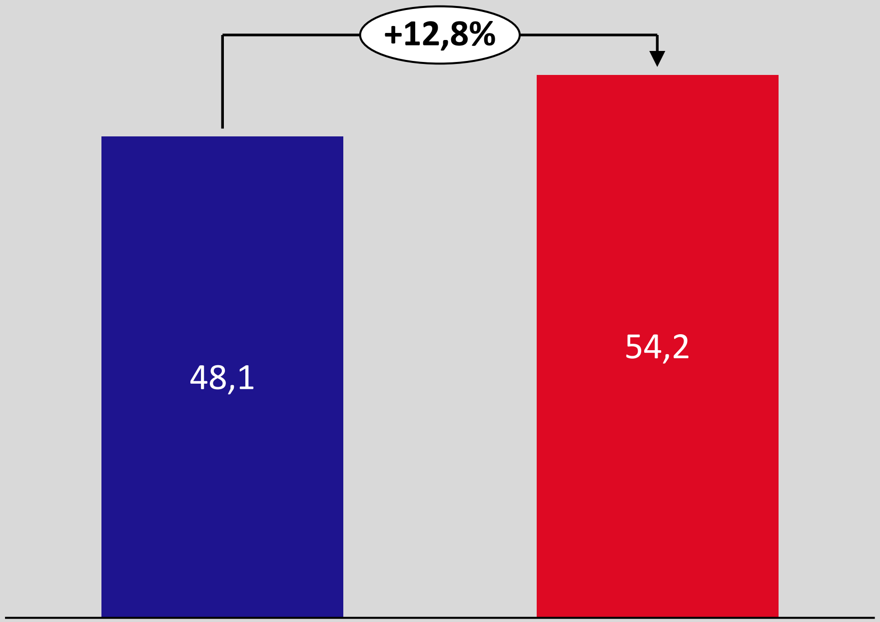


Net loss decreased both in Q2 and 1H

Strong gross margin levels with controlled OPEX helped to lower the net loss

TAS29 continued to shadow bottom-line due to the decreasing trend of inflation

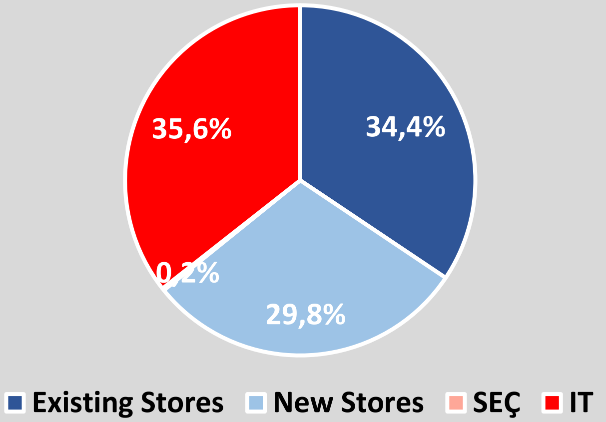
CAPEX(MTL) (MTL) 1H’26 / Consolidated



	1H 2025	1H 2026
CAPEX / Sales	0,21%	0,27 %

Inc. TAS 29

1H’26 CAPEX Breakdown



- Efficiency and control on capital expenditures continued
- 1 new «gross» store opened and one of the existing stores converted to «gross» format.
- 3 of the existing cash&carry stores merged with the existing «Bizim Gross» stores.
- Therefore, the Company reached 166 stores in 73 cities, 9 of which are in «Bizim Gross» format in total.
- Also, we closed 1 warehouses in order to increase efficiency and continued our operations from existing 13 warehouses.

Working Capital & Net Cash (Inc. TAS 29) / Consolidated

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MTL	1H2025	1H2026
Trade Receivables	1.718,7	1.830,4
Inventory	4.124,1	3.961,3
Trade Payables	10.098,1	10.516,1
Working Capital	**- 4.255,3**	**- 4.724,3**

Average Days (*)	1H2025	1H2026
Trade Receivables	13,0	16,6
Inventory	37,3	42,9
Trade Payables	76,3	95,3
Cash Conversion Cycle	**-26,1**	**-35,9**

MTL	2025	1H2026
Financial Debt	-2288,2	-2118,5
Short-term	-868,5	-833,6
Leasing Debts	*0,0*	*0,0*
Rental Contractual Obligations (IFRS 16)	*-868,5*	*-833,6*
Long-term	-1419,7	-1284,9
Leasing Debts	*0,0*	*0,0*
Rental Contractual Obligations (IFRS 16)	*-1419,7*	*-1284,9*
Cash and cash equivalents	259,7	781,8
Net Debt (Inc. IFRS16 Rental Obligation)	**-2028,5**	**-1336,7**

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Appendix

Income Statement (Consolidated & Inc.TAS 29)

MTL	2Q2025	2Q2026	▲	1H2025	1H2026	▲
Revenue	**11.517,13**	**9.600,10**	**-16,6%**	**23.809,41**	**19.853,15**	**-16,6%**
Gross Profit	**1.884,14**	**1.516,09**	**-19,5%**	**3.897,09**	**3.214,28**	**-17,5%**
Gross Margin	**16,4%**	**15,8%**	**-60bps**	**16,4%**	**16,2%**	**-20bps**
Mark., Sales and Distr. Expenses	-1632,2	-1414,8	-13,3%	-3334,4	-2892,1	-13,3%
Gen. & Adm. Expenses	-371,6	-276,6	-25,6%	-762,2	-671,0	-12,0%
Other Income / (Expenses) Related to Operating Activities	-744,9	-484,9	-34,9%	-1362,7	-915,6	-32,8%
Operating Profit	**-864,5**	**-660,2**	**-23,6%**	**-1562,3**	**-1264,4**	**-19,1%**
Profit Before Finance Expense	**-845,7**	**-619,6**	**-26,7%**	**-1467,0**	**-1194,6**	**-18,6%**
Profit Before Tax	**-666,7**	**-262,9**	**-60,6%**	**-890,4**	**-388,6**	**-56,4%**
Net Income	**-621,2**	**-285,8**	**-54,0%**	**-993,1**	**-500,5**	**-49,6%**
Net Income Margin	**-5,4%**	**-3,0%**	**240bps**	**-4,2%**	**-2,5%**	**170bps**
Adjusted EBITDA(*)	**385,3**	**293,1**	**-23,9%**	**788,9**	**592,9**	**-24,8%**
Adjusted EBITDA Margin(*)	**3,3%**	**3,1%**	**-20bps**	**3,3%**	**3,0%**	**-30bps**
EPS	**-7,72**	**-3,55**	**-54,0%**	**-12,34**	**-6,22**	**-49,6%**

(*) Other Income&Expenses were excluded.

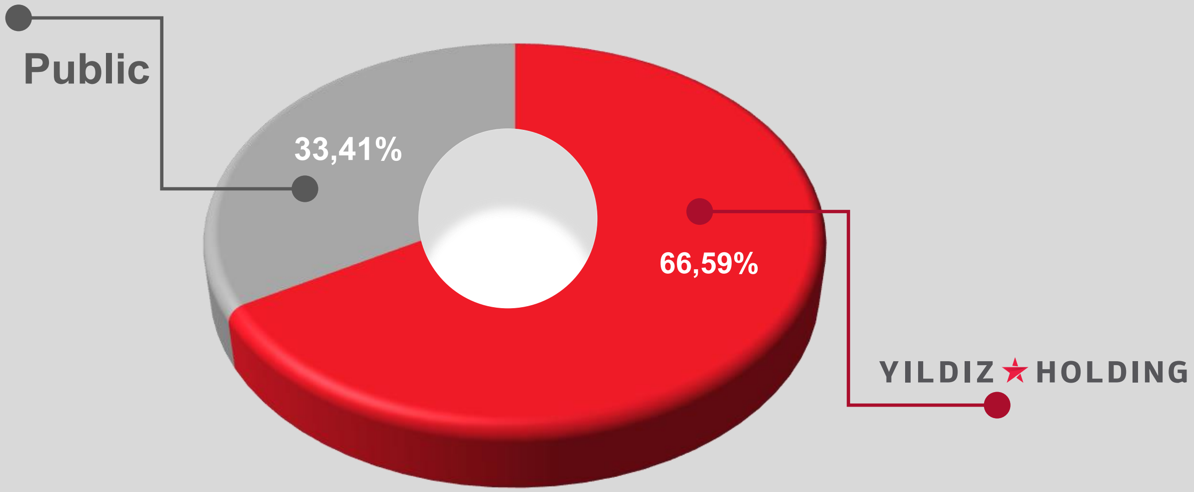
Balance Sheet (Consolidated & Inc. TAS 29)

MTL	31.12.2025	30.06.2026
Current Assets	**6.353,8**	**6.838,8**
Cash and Cash Equivalents	259,7	781,8
Trade Receivables	1.718,7	1.830,4
Inventory	4.124,1	396,1
Other	251,2	3.830,4
Non Current Assets	**7.849,4**	**7.188,1**
Prop., Plant and Equipment	3.021,7	2.699,2
Intangible Assets	624,0	574,0
Other	4.203,8	3.914,8
Total Assets	**14.203,2**	**14.026,9**

MTL	31.12.2025	30.06.2026
Current Liabilities	**11.795,9**	**12.295,6**
Short-Term Financial Liabilities	868,5	833,6
Trade Payables	10.098,1	10.516,1
Other	829,2	945,9
Non Current Liabilities	**2.066,3**	**1.951,3**
Long-Term Financial Liabilities	1.419,7	1.284,9
Other	646,6	666,4
Equity	**341,0**	**- 220,0**
Paid in Capital	80,5	80,5
Other	1.193,8	187,2
Net Profit for the Year	- 933,3	- 487,7
Total Liabilities and Equity	**14.203,2**	**14.026,9**

Shareholder Structure & Subsidiaries

Shareholder Structure



Subsidiaries

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Shareholder Structure:
- 90,0% Bizim Toptan
- 10,0% Other

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Shareholder Structure:
- 90.00% Bizim Toptan
- 10.00% Yıldız Holding

(*): According to Central Registration Agency data

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