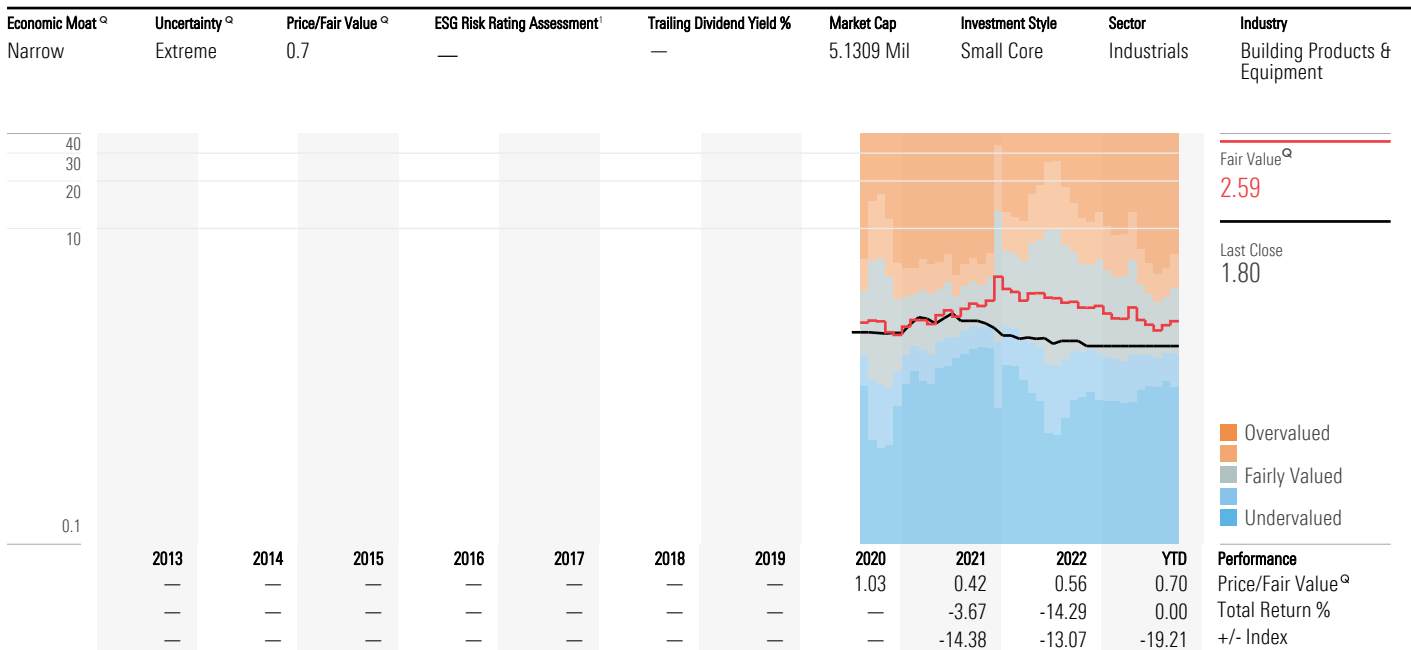


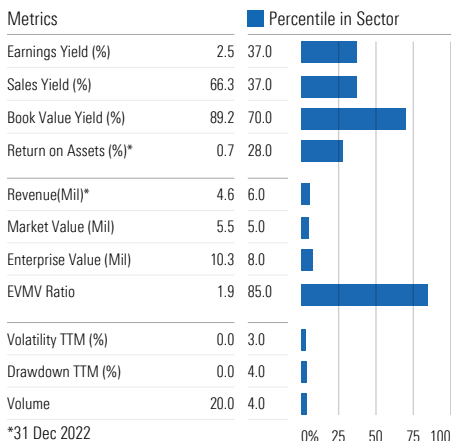
Robot SA Ordinary Shares RBT ★★★ Q 22 Sep 2023, 22:37 UTC



As of 22 Sep 2023 | Index: Morningstar Spain GR EUR. Fair Value data as of 22 Sep 2023, 22:37 UTC.

¹The ESG Risk Rating Assessment is a representation of Sustainalytics' ESG Risk Rating. Lee Davidson, Chief Analytics Officer for Morningstar, Inc, oversees the methodology that supports Quantitative Fair Value Estimates and Quantitative Star Ratings. Mr. Davidson is guided by the Morningstar, Inc. Code of Ethics in carrying out his responsibilities. For information regarding Conflicts of Interests, visit <http://global.morningstar.com/equitydisclosures>.

Key Metrics as of 21 Sep 2023



Business Description

Robot SA designs, manufactures, and maintains systems for building control. The objective of the robot system is to optimize the control of installations in buildings and industries and facilitate the management of their consumption.

Valuation ^Q as of 23 Sep 2023

Robot achieves a 3-star quantitative star rating based on Morningstar's equity model. This reflects the company's valuation and uncertainty scores under this assessment system. The Quantitative Fair Value estimate is 2.59, above the previous closing price of 1.80. The stock has been trading between a 52.1% and 17.66% discount to its quantitative fair value over the past year. The stock's current valuation rating sits at the 47th percentile in the coverage universe and 32nd percentile in the industrials sector (higher percentile indicates more undervalued).

The quantitative uncertainty rating for Robot is Extreme. Our quantitative star rating remains unchanged over the past year; the uncertainty rating last differed on 08/14/2023, when it was Very High. The main drivers of the company's valuation and uncertainty are its EV-MV ratio and drawdown. The enterprise value-to-market value ratio of 1.89 falls at the 84th percentile in the equity universe and the 85th percentile in its sector. The trailing 12-month maximum drawdown of 0.00% corresponds to the 5th percentile overall and the 5th percentile in the industry.

Economic Moat ^Q as of 23 Sep 2023

Quantitatively, we believe Robot has a Narrow economic moat. Its moat score of 0.94 corresponds to the 89th percentile in the industrials sector. Furthermore, this rating has not changed over the past

year, while the company's moat score is near its maximum in this period.

The company also maintains a quantitative financial health rating of Moderate. Its score sits at the 67th percentile in both the universe and sector. Examining the company's financials and market statistics, we find these ratings are principally driven by its enterprise value-to-market value ratio and enterprise value-to-market value ratio. The enterprise value-to-market value ratio is 1.89, sitting at the 85th percentile in the industrials sector. The company's enterprise value-to-market value ratio is 1.89, corresponding to the 84th percentile in the equity coverage universe and the 85th percentile in the sector.

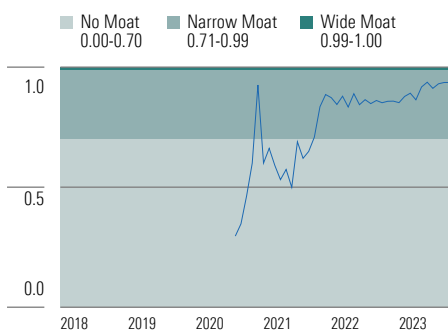
Fundamentals as of 22 Sep 2023

The earnings per share for Robot is 0.03. The company earns a return on invested capital of 1.6%, falling at the 25th percentile in the industrials sector. The company did not report a dividend. We calculate the above figures over a trailing 12-month period.

Contact

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 +34 971244471
<https://www.robotcorporativo.com>

Economic Moat ^Q History as of 23 Sep 2023



Robot SA Ordinary Shares RBT ★★★ Q 22 Sep 2023, 22:37 UTC

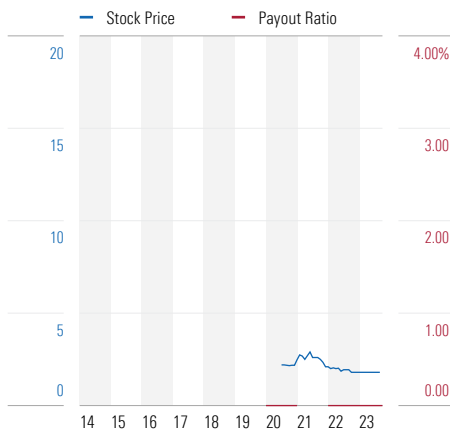
Economic Moat ^Q	Uncertainty ^Q	Price/Fair Value ^Q	ESG Risk Rating Assessment ¹	Trailing Dividend Yield %	Market Cap	Investment Style	Sector	Industry
Narrow	Extreme	0.7	—	—	5.1309 Mil	Small Core	Industrials	Building Products & Equipment

Earnings as of 21 Sep 2023

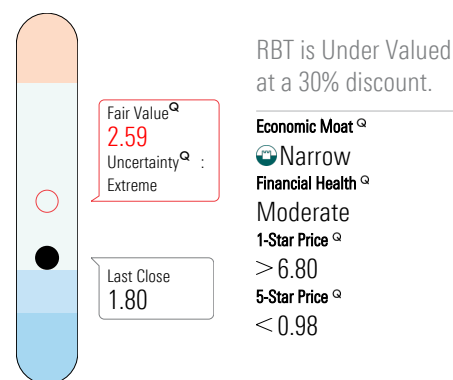
Earnings	%	■ Percentile in Sector
Dividend Yield*	—	—
Payout Ratio*	—	—
Price to Earnings	—	—
Price to Cash Flow	—	—
ROIC**	1.6	25.0

*—
**31 Dec 2022

Dividends as of 22 Sep 2023



Valuation ^Q as of 22 Sep 2023



Financials as of 22 Sep 2023 (Fiscal Year End 31 Dec 2020)

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	YTD	Fiscal
1,603	2,290	2,151	3,076	4,028	3,662	4,505	2,289	2,318	4,343	4,343	Revenue (K)
190	222	253	472	913	380	786	-970	-498	-31	-31	Operating Income (K)
11.86	9.71	11.78	15.35	22.66	10.37	17.46	-42.38	-21.5	-0.72	-0.72	Operating Margin (%)
43	205	146	338	748	367	678	-719	-415	72	72	Net Income (K)
0.02	0.10	0.07	0.17	0.37	0.13	0.24	-0.26	-0.15	0.03	0.03	Diluted Earnings/Share
—	—	—	—	-142	413	-723	-592	-660	-507	-507	Operating Cash Flow (K)
—	—	—	—	-315	-278	-237	-130	-86	-192	-192	Capital Spending (K)
—	—	—	—	-457	135	-959	-722	-746	-699	-699	Free Cash Flow (K)
2,771	2,021	2,021	2,021	2,021	2,745	2,811	2,817	2,814	2,814	2,814	Avg Shares Outstand(K)

Valuation as of 22 Sep 2023

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Current	Calendar
—	—	—	—	—	—	—	1.03	0.42	0.56	0.70	Price/Fair Value ^Q
—	—	—	—	—	—	—	1.54	3.90	1.51	1.51	Price/Sales
—	—	—	—	—	—	—	32.76	—	39.78	39.78	Price/Earnings
—	—	—	—	—	—	—	—	—	—	—	Price/Cash Flow
—	—	—	—	—	—	—	1.11	1.31	1.12	1.12	Price/Book

Operating Performance as of — (Fiscal Year End 31 Dec 2020)

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Q3	Fiscal (%)
0.85	4.07	2.8	6.13	10.96	4.71	8.87	-7.9	-4.03	0.71	2.85	Return on Assets
2.16	9.91	6.52	13.89	18.95	7.01	13.2	-12.57	-7.49	1.56	4.29	Return on Equity
3.39	7.09	5.06	8.72	13.18	5.74	9.95	-7.71	-3.34	1.6	3.33	Rtn on Invested Capital

Dividends as of —

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Current	Calendar (%)
—	—	—	—	—	—	—	—	—	—	—	Dividend Per Share
—	—	—	—	—	—	—	—	—	—	—	Trailing Dividend Yield
—	—	—	—	—	—	—	0.1	—	0.58	0.58	Buyback Yield

Appendix

Economic Moat [®]History as of 23 Sep 2023 (No Moat: 0.00-0.70, Narrow Moat: 0.70-0.99, Wide Moat: 0.99-1.00)

Year	January	February	March	April	May	June	July	August	September	October	November	December
2023	0.85	0.88	0.89	0.86	0.92	0.94	0.91	0.93	0.94	—	—	—
2022	0.87	0.84	0.88	0.83	0.89	0.84	0.86	0.85	0.86	0.85	0.86	0.86
2021	0.60	0.66	0.59	0.53	0.57	0.50	0.69	0.62	0.65	0.71	0.84	0.89
2020	—	—	—	—	—	—	—	0.30	0.35	0.46	0.60	0.93
2019	—	—	—	—	—	—	—	—	—	—	—	—
2018	—	—	—	—	—	—	—	—	—	—	—	—

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The quantitative report on equities consists of data, statistics and quantitative equity ratings on equity securities. Morningstar, Inc.'s quantitative equity ratings are forward looking and are generated by a statistical model that is based on Morningstar Inc.'s analyst-driven equity ratings and quantitative statistics. Given the nature of the quantitative report and the quantitative ratings, there is no one analyst in which a given report is attributed to; however, Mr. Lee Davidson, Head of Quantitative Research for Morningstar, Inc., is responsible for overseeing the methodology that supports the quantitative equity ratings used in this report. As an employee of Morningstar, Inc., Mr. Davidson is guided by Morningstar, Inc.'s Code of Ethics and Personal Securities Trading Policy in carrying out his responsibilities.

Quantitative Equity Ratings

Morningstar's quantitative equity ratings consist of: (i) Quantitative Fair Value Estimate, (ii) Quantitative Star Rating, (iii) Quantitative Uncertainty, (iv) Quantitative Economic Moat, and (v) Quantitative Financial Health (collectively the "Quantitative Ratings").

The Quantitative Ratings are calculated daily and derived from the analyst-driven ratings of a company's peers as determined by statistical algorithms. Morningstar, Inc. ("Morningstar", "we", "our") calculates Quantitative Ratings for companies whether or not it already provides analyst ratings and qualitative coverage. In some cases, the Quantitative Ratings may differ from the analyst ratings because a company's analyst-driven ratings can significantly differ from other companies in its peer group.

- i. **Quantitative Fair Value Estimate:** Intended to represent Morningstar's estimate of the per share dollar amount that a company's equity is worth today. Morningstar calculates the Quantitative Fair Value Estimate using a statistical model derived from the Fair Value Estimate Morningstar's equity analysts assign to companies. Please go to <http://global.morningstar.com/equitydisclosures> for information about Fair Value Estimate Morningstar's equity analysts assign to companies.
- ii. **Quantitative Economic Moat:** Intended to describe the strength of a firm's competitive position. It is calculated using an algorithm designed to predict the Economic Moat rating a Morningstar analyst would assign to the stock. The rating is expressed as Narrow, Wide, or None.
 - Narrow** – assigned when the probability of a stock receiving a "Wide Moat" rating by an analyst is greater than 70% but less than 99%.
 - Wide** – assigned when the probability of a stock receiving a "Wide Moat" rating by an analyst is greater than 99%.
 - None** – assigned when the probability of an analyst receiving a "Wide Moat" rating by an analyst is less than 70%.

- iii. **Quantitative Star Rating:** Intended to be the summary rating based on the combination of our Quantitative Fair Value Estimate, current market price, Quantitative Uncertainty Rating, and momentum. The rating is expressed as One-Star, Two-Star, Three-Star, Four-Star, and Five-Star.

★ – the stock is overvalued with a reasonable margin of safety.

*Log (Quant FVE/Price) < -1*Quantitative Uncertainty*

*Micro-Caps: Log (Quant FVE/Price) < -1.5*Quantitative Uncertainty*

★★ – the stock is somewhat overvalued.

*Log (Quant FVE/Price) between (-1*Quantitative Uncertainty, -0.5*Quantitative Uncertainty)*

*Micro-Caps: Log (Quant FVE/Price) between (-1.5*Quantitative Uncertainty, -0.75*Quantitative Uncertainty)*

★★★ – the stock is approximately fairly valued.

*Log (Quant FVE/Price) between (-0.5*Quantitative Uncertainty, 0.5*Quantitative Uncertainty)*

*Micro-Caps: Log (Quant FVE/Price) between (-0.75*Quantitative Uncertainty, 0.75*Quantitative Uncertainty)*

★★★★ – the stock is somewhat undervalued.

*Log (Quant FVE/Price) between (0.5*Quantitative Uncertainty, 1*Quantitative Uncertainty)*

*Micro-Caps: Log (Quant FVE/Price) between (0.75*Quantitative Uncertainty, 1.5*Quantitative Uncertainty)*

★★★★★ – the stock is undervalued with a reasonable margin of safety.

*Log (Quant FVE/Price) > 1*Quantitative Uncertainty*

*Micro-Caps: Log (Quant FVE/Price) > 1.5*Quantitative Uncertainty*

After the initial calculation for the star rating, there is a final filtering step based on the momentum of the company. We rank the companies based on their 12-1 month momentum, then restrict those below the 30th percentile to a maximum of 3 stars.

- iv. **Quantitative Uncertainty:** Intended to represent Morningstar's level of uncertainty about the accuracy of the Quantitative Fair Value Estimate. Generally, the lower the Quantitative Uncertainty, the narrower the potential range of outcomes for that particular company. The rating is expressed as Low, Medium, High, Very High, and Extreme.

Low – the interquartile range for possible fair values is less than 10%

Medium – the interquartile range for possible fair values is less than 15% but greater than 10%

High – the interquartile range for possible fair values is less than 35% but greater than 15%

Very High – the interquartile range for possible fair values is less than 80% but greater than 35%

Extreme – the interquartile range for possible fair values is greater than 80%

- v. **Quantitative Financial Health:** Intended to reflect the probability that a firm will face financial distress in the near future. The calculation uses a predictive model designed to anticipate when a company may default on its financial obligations. The rating is expressed as Weak, Moderate, and Strong.

Weak – assigned when Quantitative Financial Health < 0.2

Moderate – assigned when Quantitative Financial Health is between 0.2 and 0.7

Strong – assigned when Quantitative Financial Health > 0.7

Other Definitions

- i. **Last Close** – Price of the stock as of the close of the market of the last trading day before date of the report.
- ii. **Quantitative Valuation** – Using the below terms, intended to denote the relationship between the security's **Last Price** and Morningstar's quantitative fair value estimate for that security.

Undervalued – Last Price is below Morningstar's quantitative fair value estimate.

Fairly Valued – Last Price is in line with Morningstar's quantitative fair value estimate.

Overvalued – Last Price is above Morningstar's quantitative fair value estimate.

Overvalued – Last Price is above Morningstar's quantitative fair value estimate.

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Based on their quantitative scores, companies are grouped into one of five Risk

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The ESG Risk Rating Assessment is a visual representation of Sustainalytics ESG Risk Categories on a 1 to 5 scale. Companies with Negligible Risk = 5 Globes, Low Risk = 4, Medium Risk = 3 Globes, High Risk = 2 Globes, Severe Risk = 1 Globe. For more information, please visit sustainalytics.com/esg-ratings/

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