Q3 2026 update



oneflow

Friday 6 November 2026
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Today’s presenters



Anders Hamnes

CEO & Founder



Natalie Jelveh

CFO

The period in summary

ARR up 16% YoY

MSEK 208.4

ARR Q3 ‘26

Net New ARR up 22% YTD

MSEK 7.8

Net New ARR Q3 ’26

First-ever positive EBIT

38% / 11%

EBITDA / EBIT margin Q3 ’26

ARR / FTE up 35% YoY

TSEK 1,486

ARR / FTE Q3 ’26

Gross retention continues to improve

99% / 89%

Net / Gross Retention Rate Q3 ’26

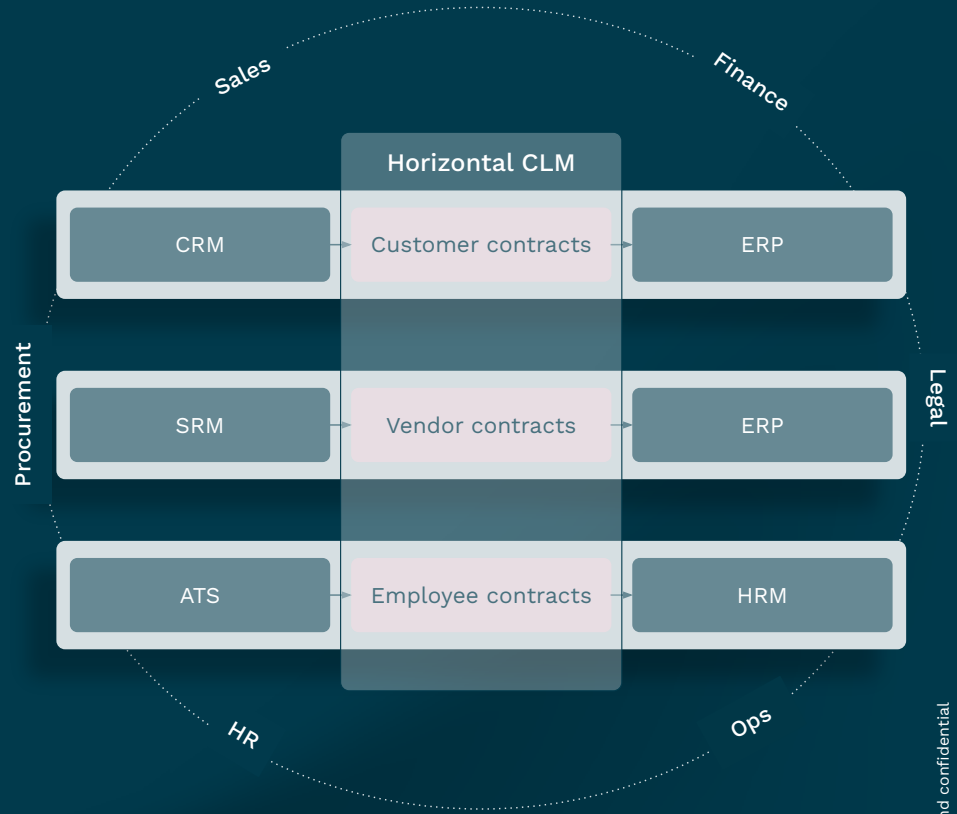
Positive net cash flow LTM

MSEK 1.0

Q3 ’26 (rolling 12 months)

Contracts as an operating system

Oneflow is an AI-powered contract lifecycle management (CLM) platform that helps teams manage the full contract lifecycle, from creation to signature and beyond. With AI, automation and connected workflows built in, Oneflow connects contracts to the people, processes and systems that run your business.



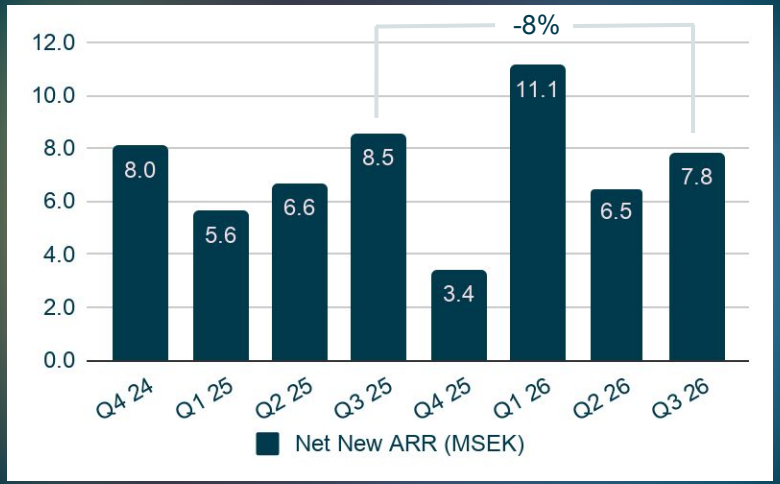
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Product highlights and recent launches

- **Launched AI Insights Premium** to monitor customer-defined rules and risks across contract portfolios.
- **Redesigned the document** list and **launched Content Search** across contracts, PDFs and attachments.
- **Improved AI summaries** with language preferences and configurable focus areas.
- **Launched Organizational Units and Content Library** for greater control and consistency at scale.
- **Improved product tables** and introduced **Local fields** for more accurate contract data and pricing.



Strong Net New ARR generation – MSEK 25.3 in nine months



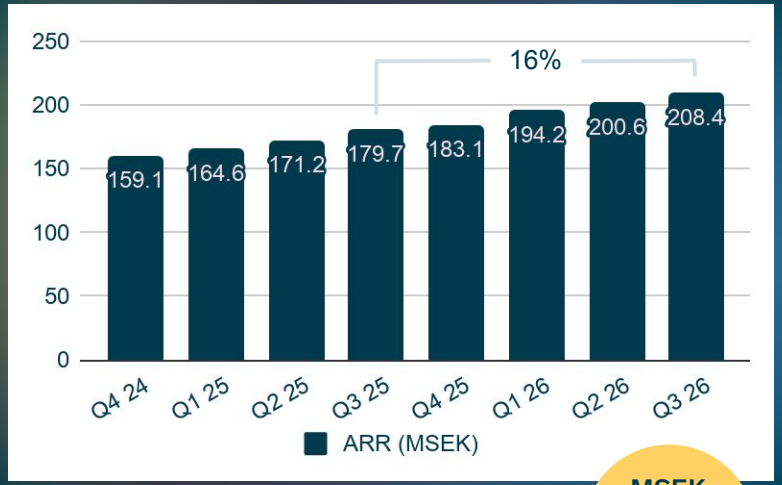


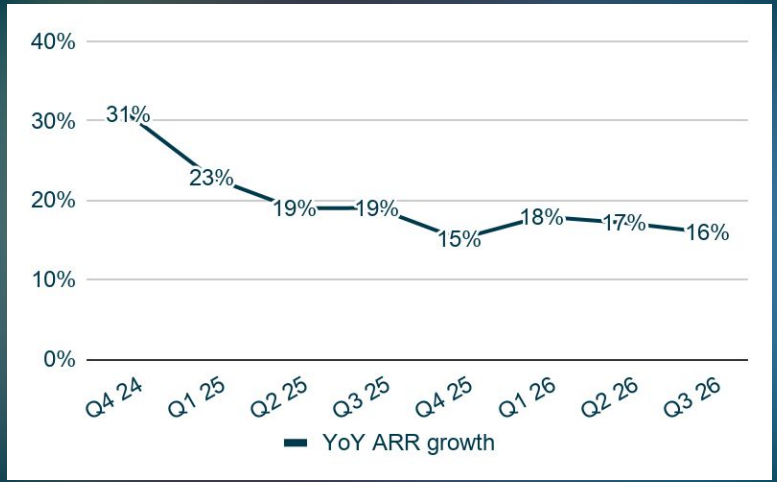
MSEK 25.3 YTD

Up 22% from MSEK 20.7 last year

In addition, contracts corresponding to MSEK 5.5 have been signed and will be recognized as ARR in coming periods.

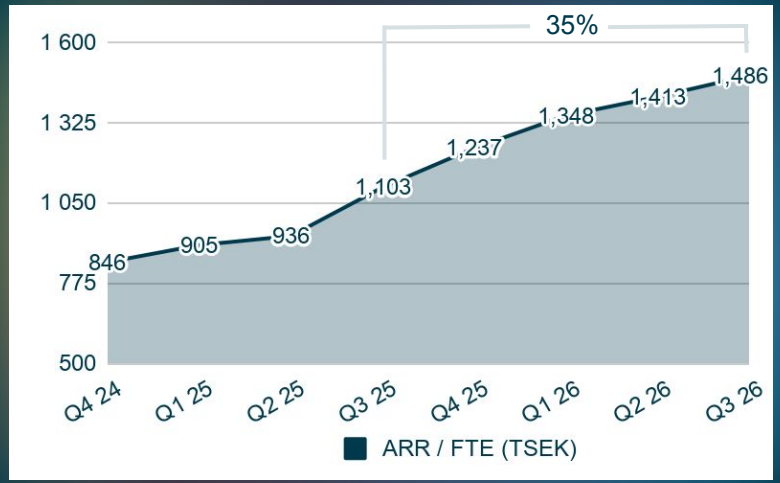
Continued double-digit ARR growth – reaching MSEK 208 in Q3





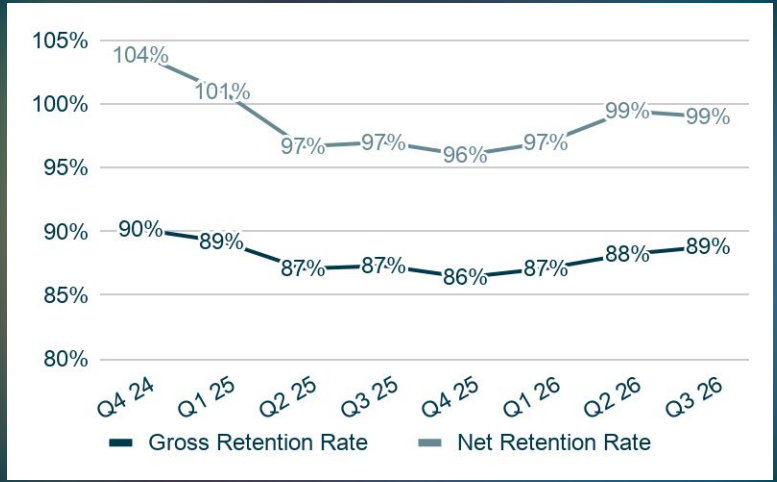
MSEK
207.9
Oct '26

Driving operational efficiency – ARR per FTE up 35% YoY



Reflects a structurally leaner organization with materially higher productivity per employee.

Building a stronger customer base – gross retention rises to 89%



99%

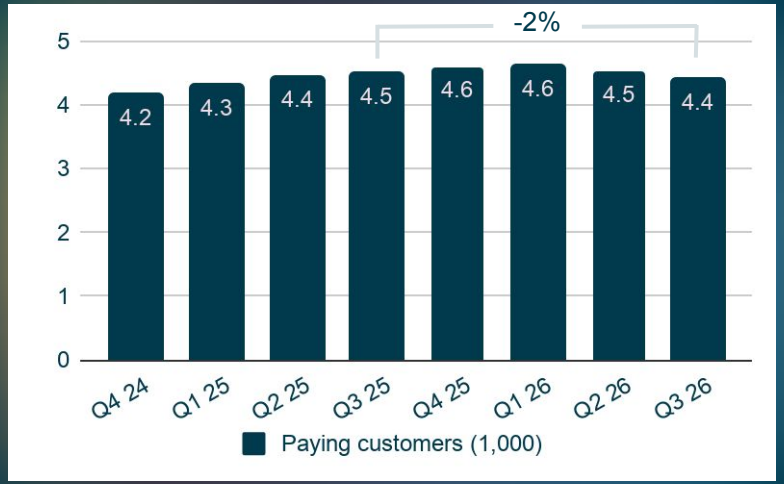
Net Retention Rate Q3 ‘26

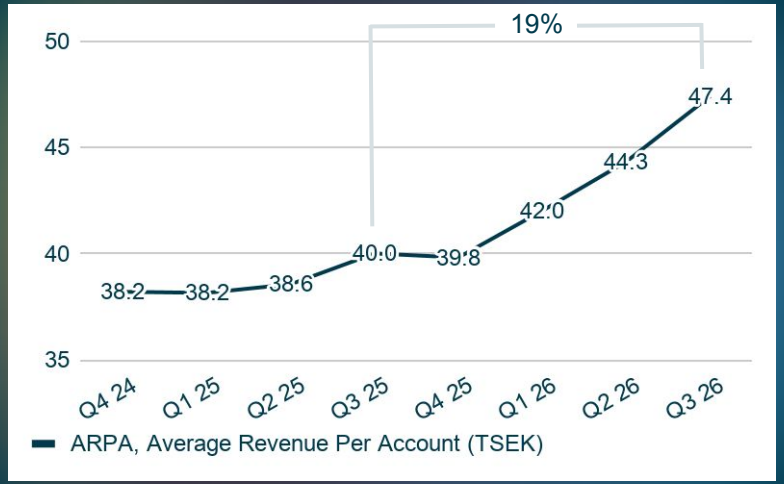
89%

Gross Retention Rate Q3 ‘26

Actions taken are starting to show results, and we expect this positive trend to continue gradually over the coming quarters.

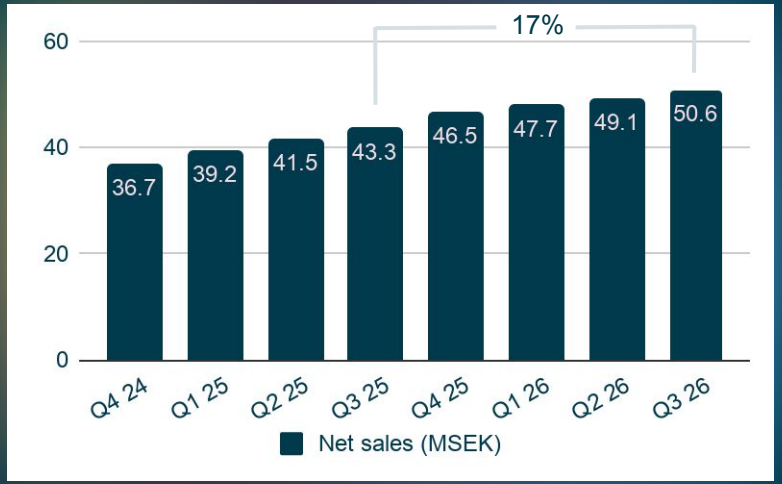
Upmarket momentum drives 19% ARPA growth





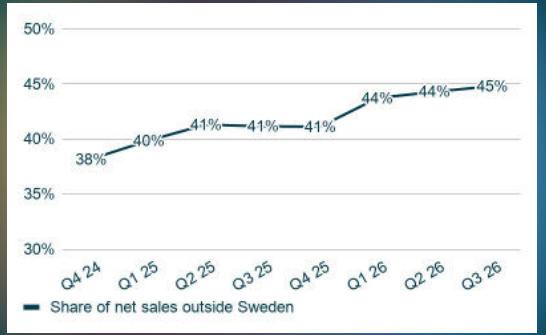
Healthier customer mix and upmarket movement contribute to higher ARPA.

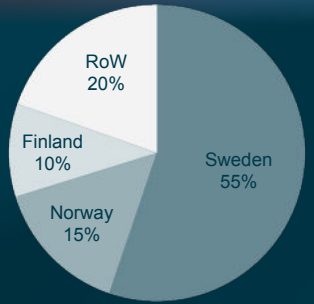
Strong sales growth and expanding international footprint



MSEK 147.4 YTD

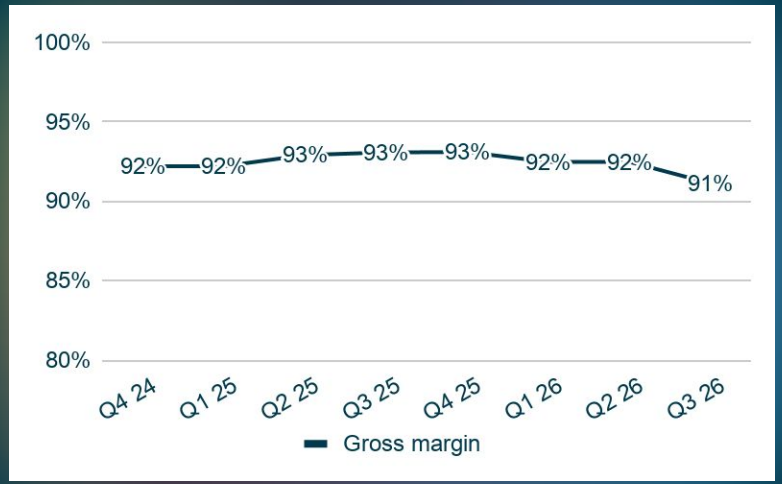
Up 19% from MSEK 124.0 last year



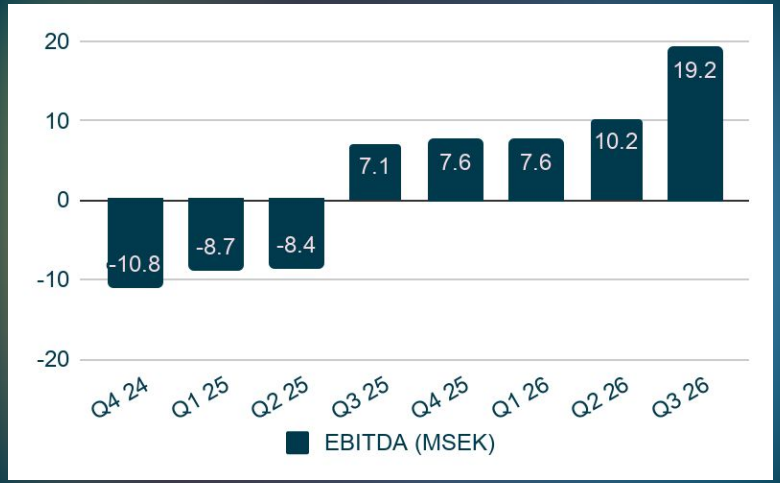


Net sales by country Q3 2026

Gross margin remains strong at 91%, despite a Q3 decline

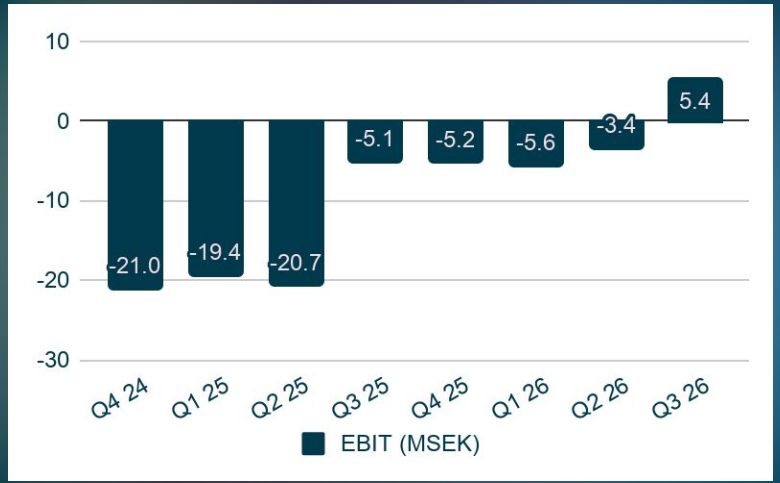


A historic milestone – first-ever positive EBIT as profitability continues to improve



MSEK 37.1 YTD

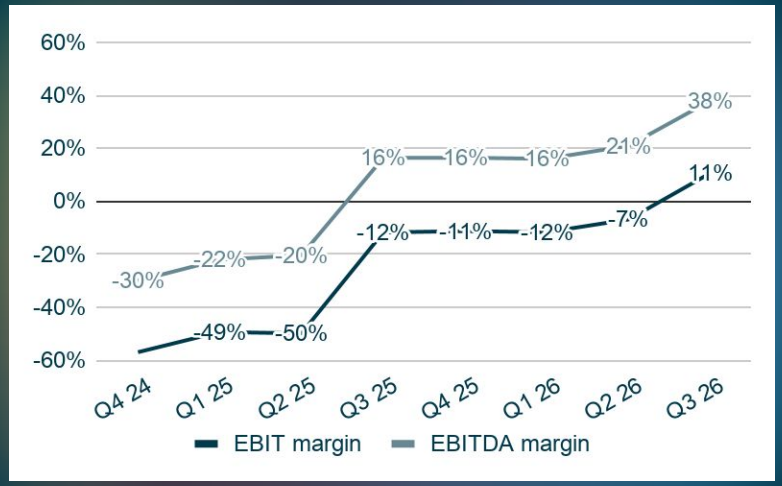
Improved from MSEK -10.0 last year



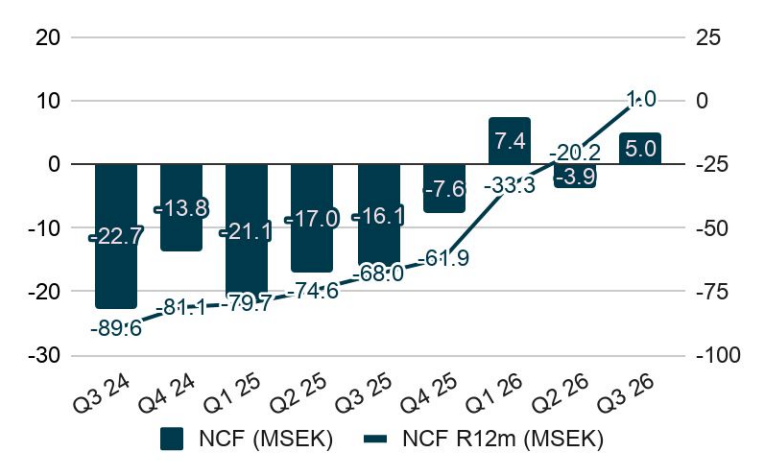
MSEK -3.6 YTD

Improved from MSEK -45.2 last year

A step change in profitability – EBIT margin reaches 11%

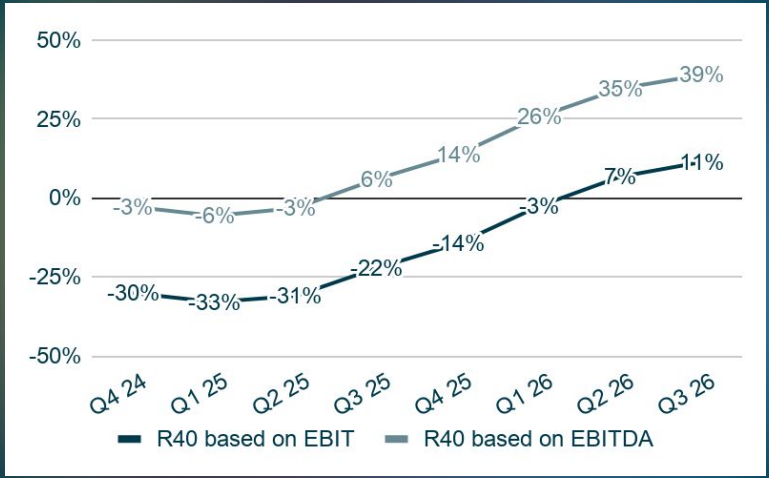


Cash flow breakthrough – positive on a rolling 12-month basis



- Stronger profitability supports operating cash generation
- A growing customer base increases recurring cash inflows
- Improved collections accelerate cash conversion

Significant ‘Rule of 40’ improvement

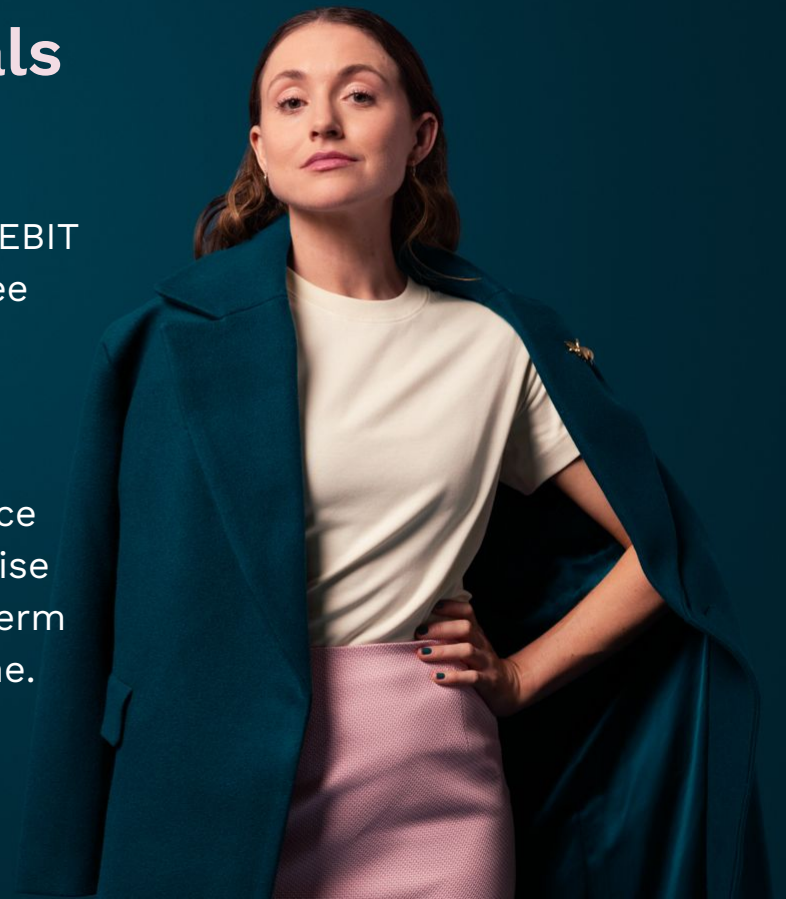


Revised our financial goals

Reach sustainable EBIT profitability within existing funding. Our ambition is to expand EBIT margins and establish sustained positive free cash flow over time.

Profitable growth

Use the Rule of 40 as a framework to balance ARR growth and EBIT margin. We will prioritise investments where we see attractive long-term returns, while maintaining financial discipline.



Summary

- EBIT margin of 11%, up from -12% last year
- Positive net cash flow of MSEK 1.0 on a rolling twelve-month basis
- 16% ARR growth YoY
- 35% higher productivity per employee YoY
- Upmarket momentum drives 19% ARPA growth



From milestone to milestone...

Q3 ‘25	Positive EBITDA for the first time
Q1 ‘26	Positive net cash flow for the first time
Q2 ‘26	Crossing MSEK 200 in ARR
Q3 ‘26	Positive EBIT margin of 11%, and positive Net cash flow on a rolling twelve-month basis



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Q&A

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