



Apresentação de Resultados **4T24 e 2024**

Agenda

bloco 1

Destaques

bloco 2

Crescimento

bloco 3

Rentabilidade

bloco 4

Atualização de Sinergias

bloco 5

Anexos



O crescimento sólido e a rentabilidade do Grupo Toky são aparentes nos resultados

4T24

GMV

+118,7% A/A

R\$ **466.9 M**

Receita Líquida

+160,7% A/A

R\$ **373.4 M**

Lucro Bruto

+450 bps A/A

48,0%

Margem de Contribuição II

+570% A/A

36,3%

Margem de Contribuição III

+1.320 bps A/A

26,8%

EBITDA Aj.

+R\$ 19 milhões A/A

R\$ **-2.1 M**

2024

GMV

+38,1% A/A

R\$ **1.1 BI**

Receita Líquida

+49,7% A/A

R\$ **811.2 M**

Lucro Bruto

+280 bps A/A

46,2%

Margem de Contribuição II

+280% A/A

33,2%

Margem de Contribuição III

+460 bps A/A

20,3%

EBITDA Aj.

+R\$24 milhões A/A

R\$ **-59.1 M**

Em R\$ Mil e em % da Receita

	4T24	4T23	Δ	2024	2023	Δ
GMV	467	214	119%	1.067,7	773,0	38%
Receita	373	143	161%	811,2	541,9	50%
Custo das vendas	-194	-81	140%	-437	-307	42%
Lucro bruto	179	62	188%	374	235	59%
Margem de lucro bruto	48,0%	43,5%	4,5 p.p	46,2%	43,4%	2,8 p.p
Despesas de Logística	-44	-18	136%	-105	-70	49%
CM II	136	44	209%	270	165	63%
Margem CM II	36,3%	30,6%	5,7 p.p	33,3%	30,5%	2,8 p.p
Despesas de marketing e vendas	-36	-24	46%	-105	-80	31%
CM III	100	19	416%	165	85	94%
Margem CM III	26,8%	13,5%	13,2 p.p	20,3%	15,7%	4,6 p.p
Pessoal	-26	-11	137%	-61	-46	33%
Outras despesas gerais e administrativas	-36	-16	125%	-71	-57	25%
EBITDA Ajustado	38	-8	NA	32	-18	NA
Margem EBITDA Ajustada	10,1%	-5,4%	15,5 p.p	4,0%	-3,4%	7,4 p.p
D&A	-44	-13	240%	-96	-64	49%
Efeitos não-recorrentes	-58	-2	NA	-59	-4	NA
EBIT Ajustado	-7	-21	-68%	-64	-83	-23%
Resultado de juros	-46	2	NA	-46	1	NA
Resultado líquido	-110	-21	419%	-169	-85	98%
Margem líquida	-29,4%	-14,8%	-14,7 p.p	-20,8%	-15,7%	-5,1 p.p
Resultado líquido ajustado	-52	-19	175%	-110	-81	35%
Margem líquida ajustada	-14,0%	-13,3%	-0,7 p.p	-13,5%	-15,0%	1,5 p.p

Não-recorrentes:

- Desp. M&A: R\$40 milhões
- DIFAL e outros: R\$19 milhões

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bloco 1

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bloco 2

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bloco 3

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bloco 4

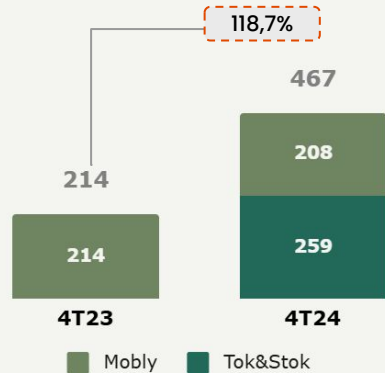
Atualização de Sinergias

bloco 5

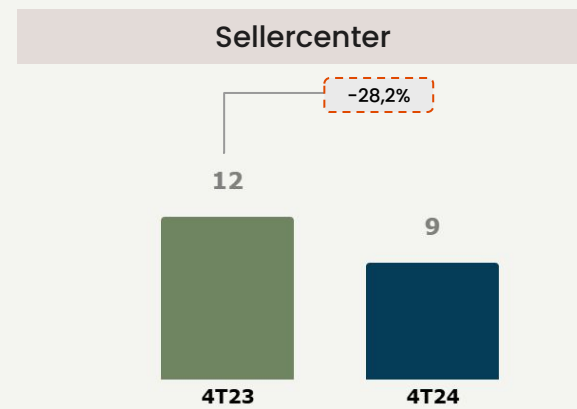
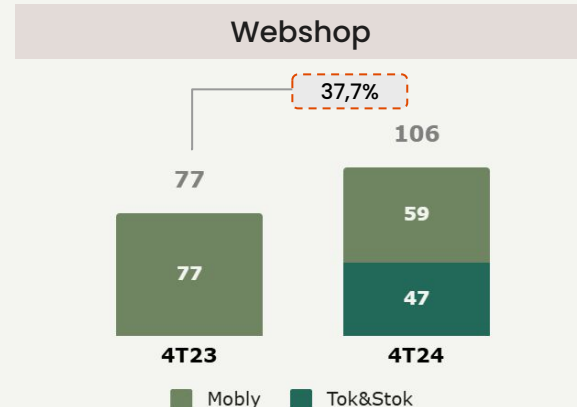
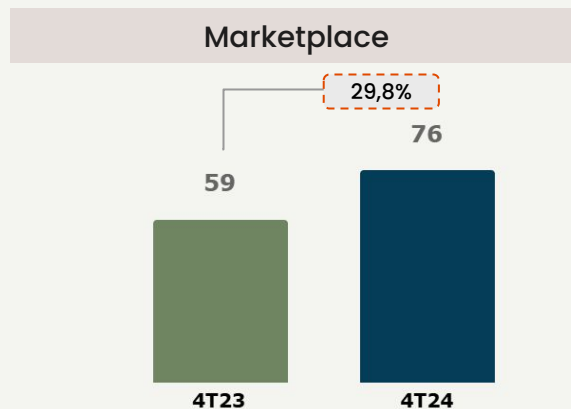
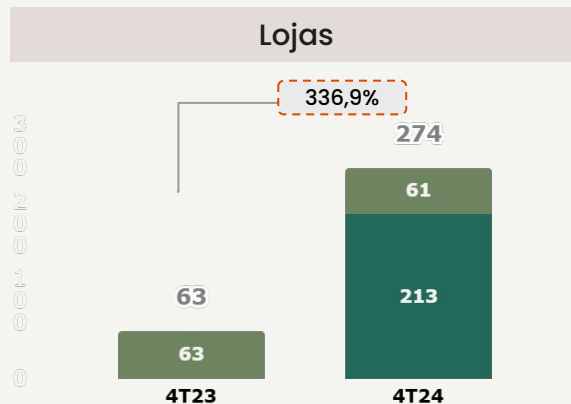
Anexos



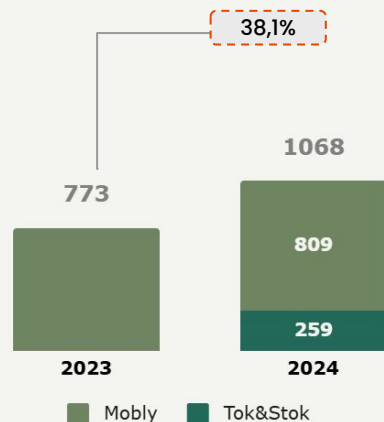
Gross Merchandise Value* – em R\$ milhões



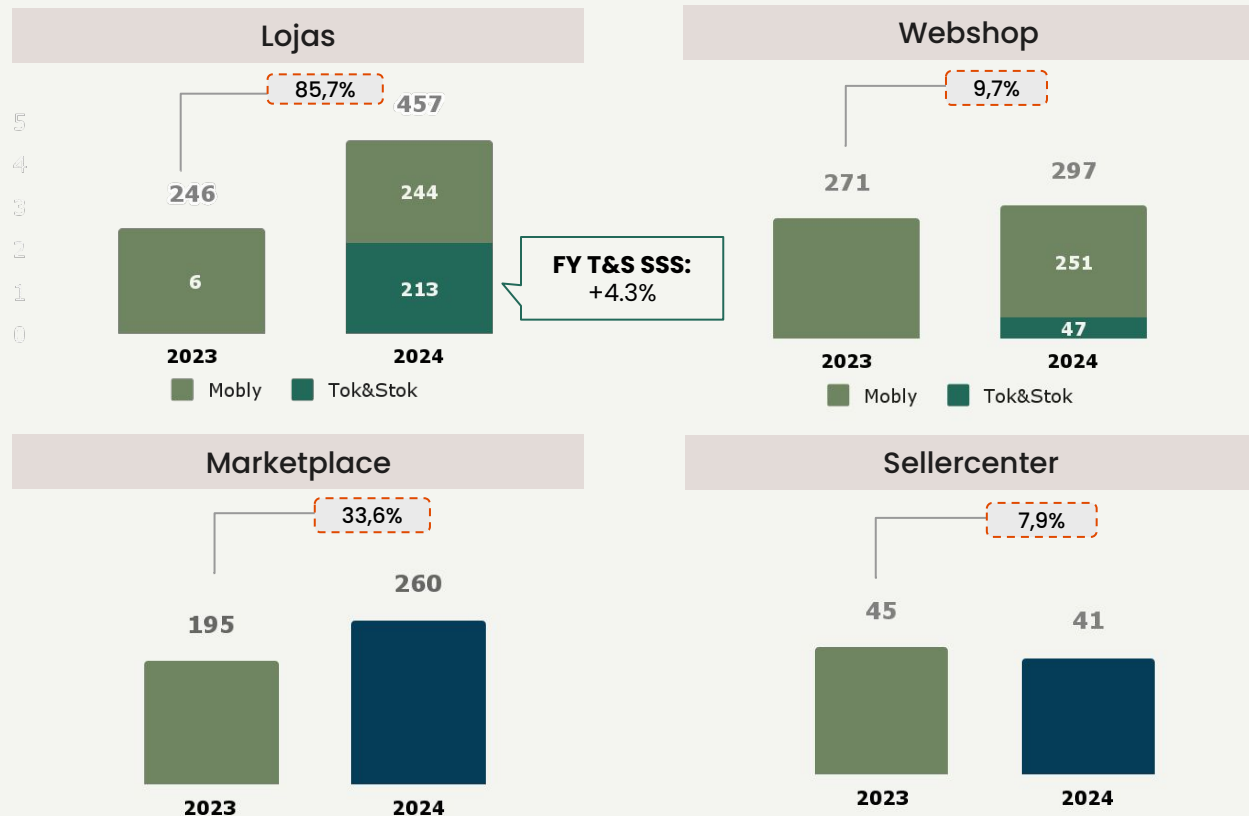
*Inclui R\$ 3 milhões de outras receitas no 4T24 e no 4T23.



Gross Merchandise Value* – em R\$ milhões



*Inclui R\$ 13 milhões de outras receitas em 2024 e R\$ 17 milhões em 2023.



Agenda

bloco 1

Destques

bloco 2

Crescimento

bloco 3

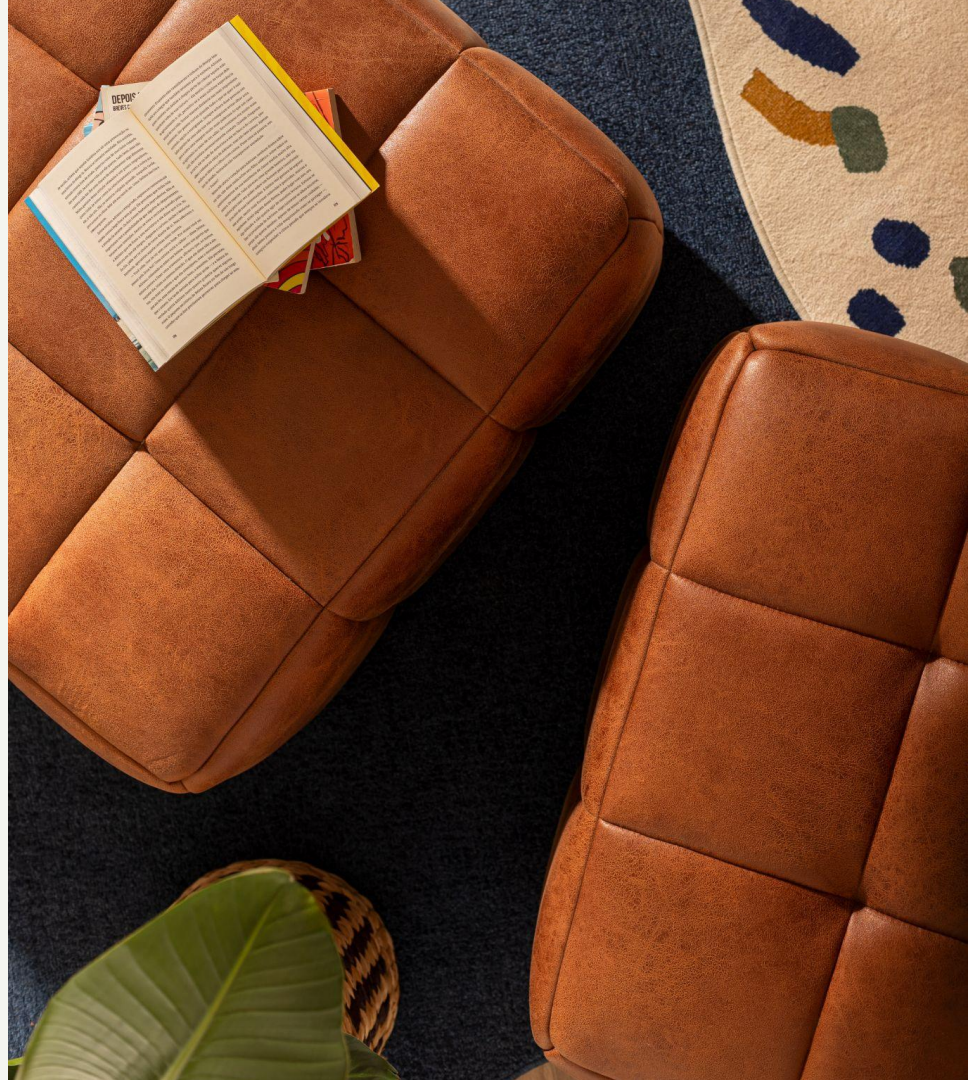
Rentabilidade

bloco 4

Atualização de Sinergias

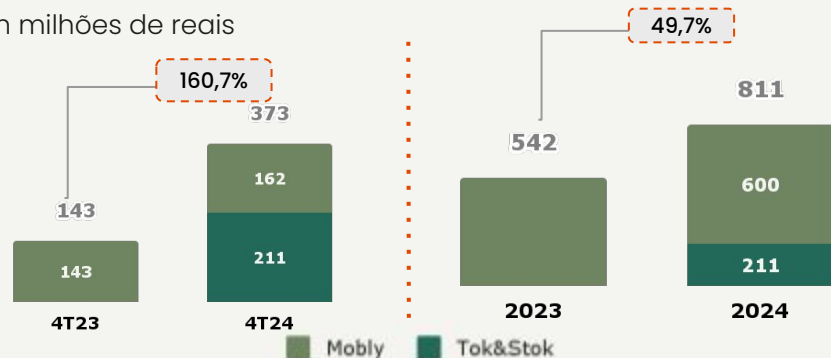
bloco 5

Anexos



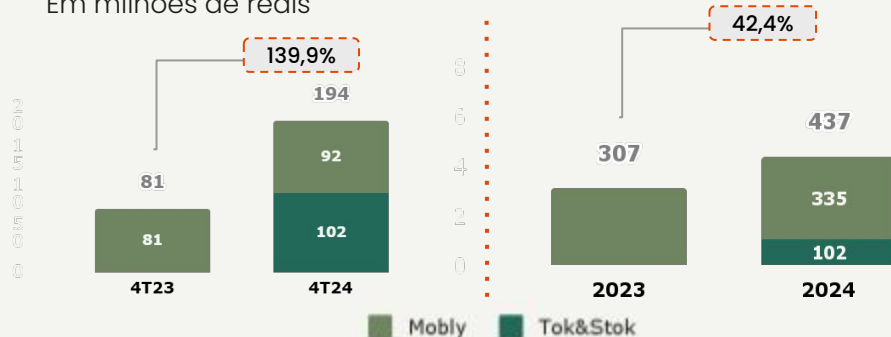
Receita Líquida

Em milhões de reais



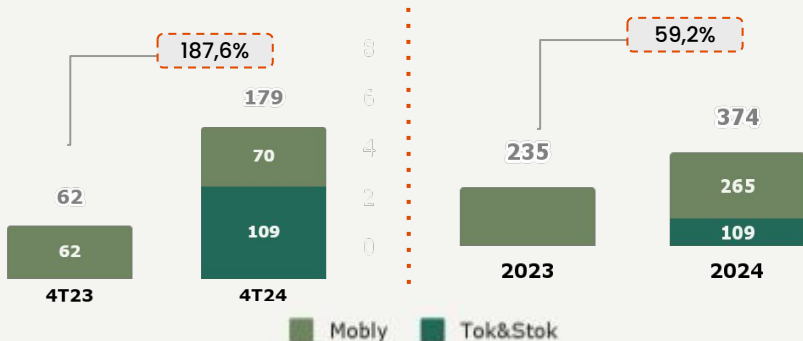
Custo das Mercadorias Vendidas

Em milhões de reais



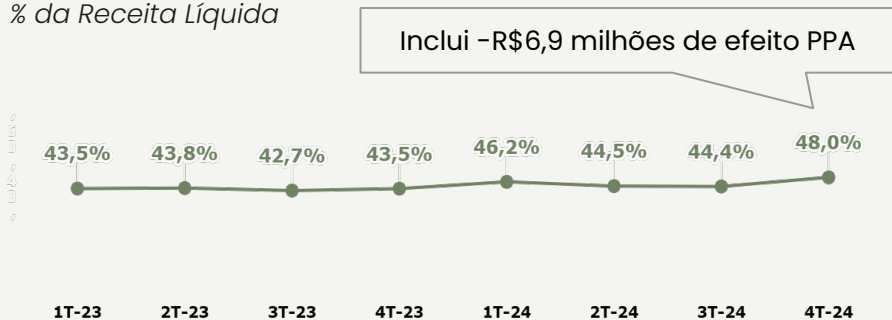
Lucro bruto (Margem de Contribuição I)

Em milhões de reais



Margem Bruta (Margem de Contribuição I)

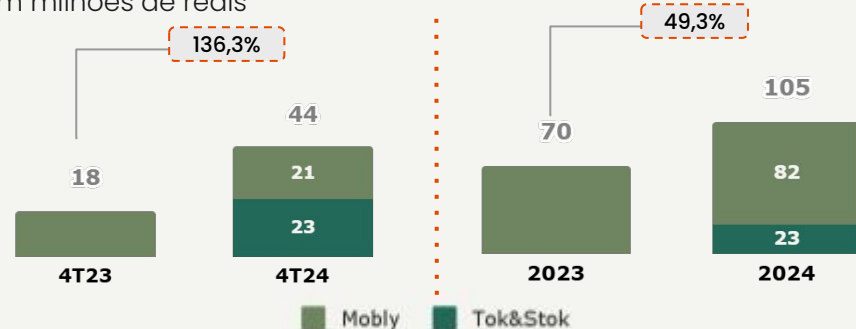
% da Receita Líquida



Nota: Valores T&S consolidados para Nov/24 e Dez/24

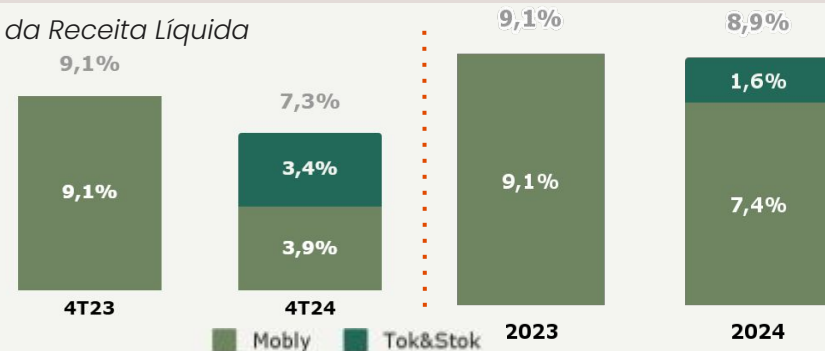
Custos Logísticos

Em milhões de reais



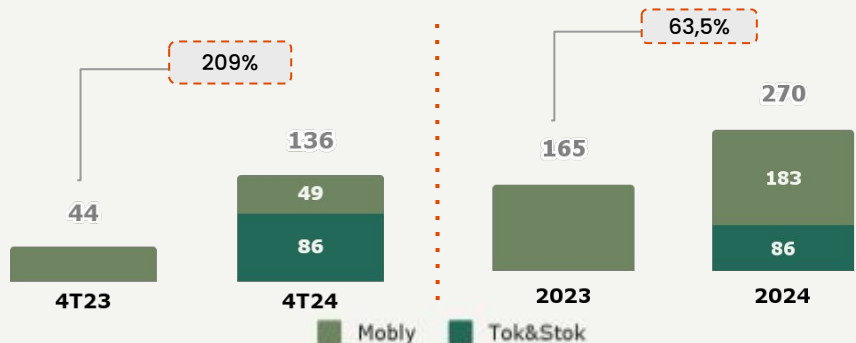
Custos de Transportes

% da Receita Líquida



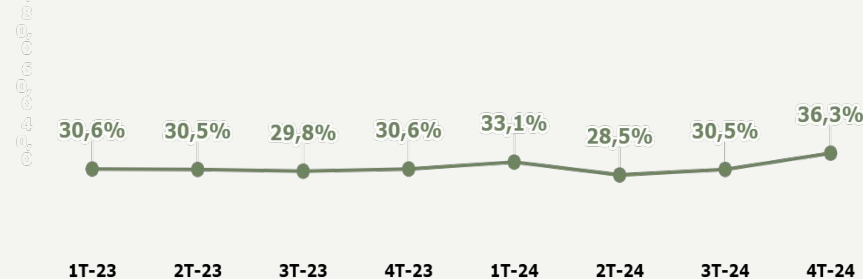
Margem de Contribuição II

Em milhões de reais



Margem de Contribuição II

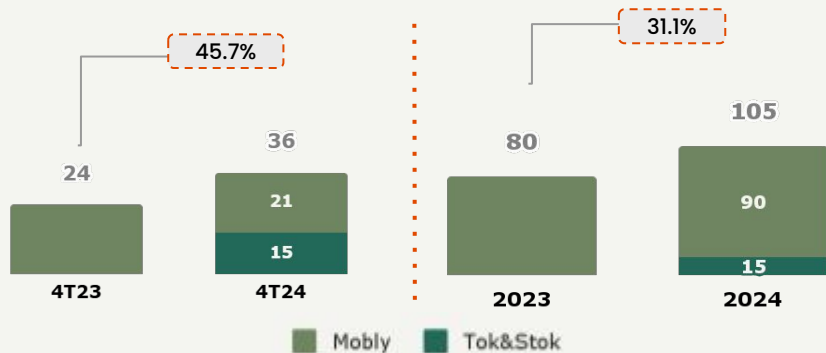
% da Receita Líquida



Nota: Valores T&S consolidados para Nov/24 e Dez/24

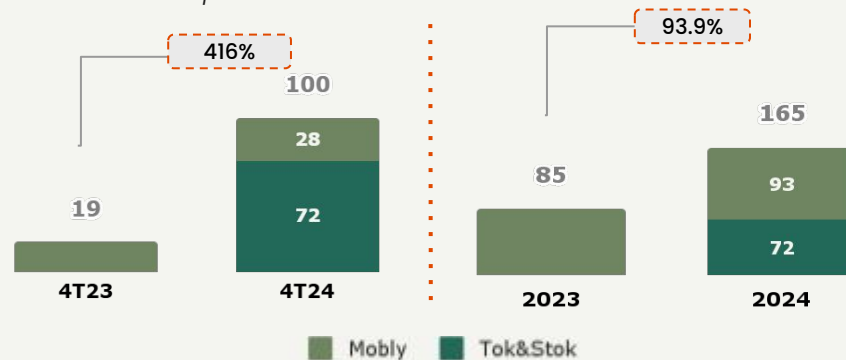
Despesas de Marketing e Vendas

Em milhões de reais



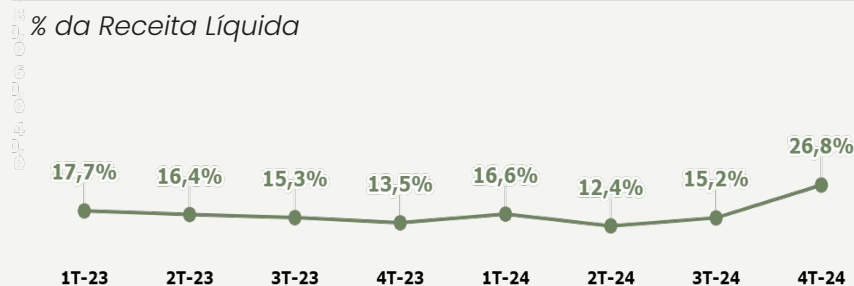
Margem de Contribuição III

% da Receita Líquida



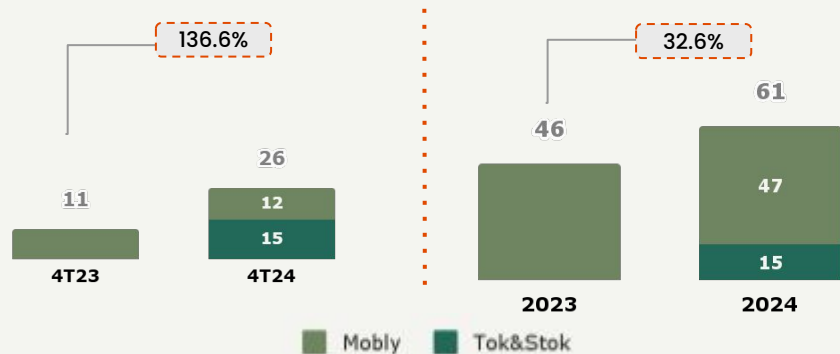
Margem de Contribuição III

% da Receita Líquida



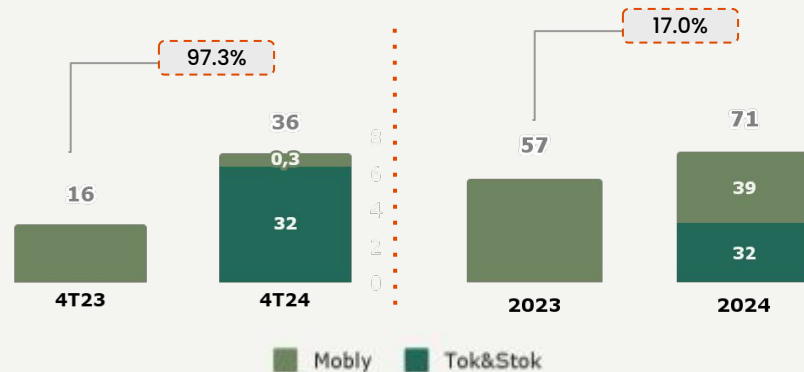
Despesas de pessoal

Em milhões de reais

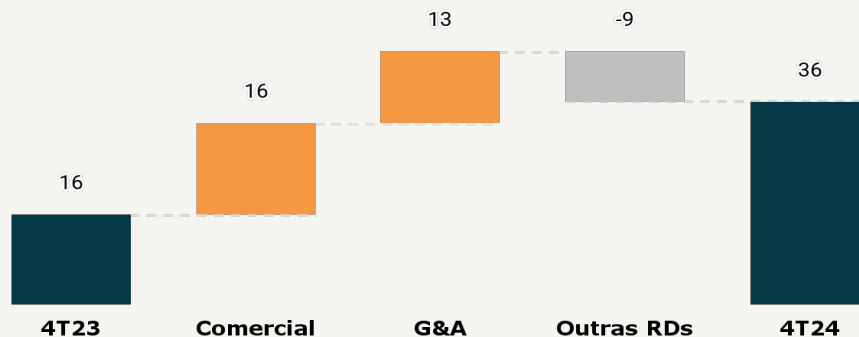


Despesas G&A

Em milhões de reais



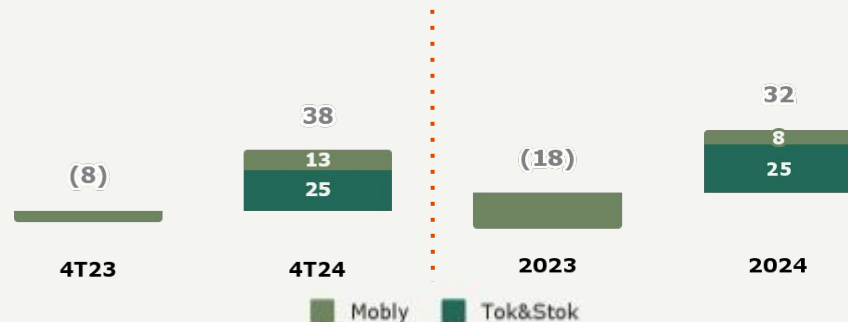
Detalhamento de G&A



Inclui +R\$9,3 milhões referentes a uma reversão de provisão relacionada a um Termo de Ajustamento de Conduta

EBITDA Ajustado

Em milhões de reais



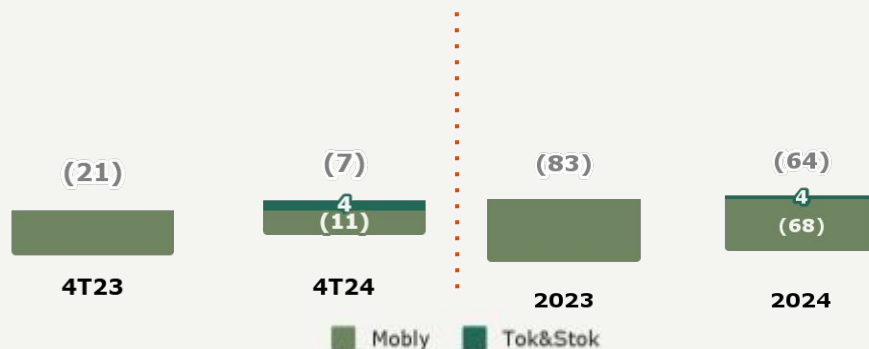
Margem EBITDA Ajustada

% da Receita Líquida



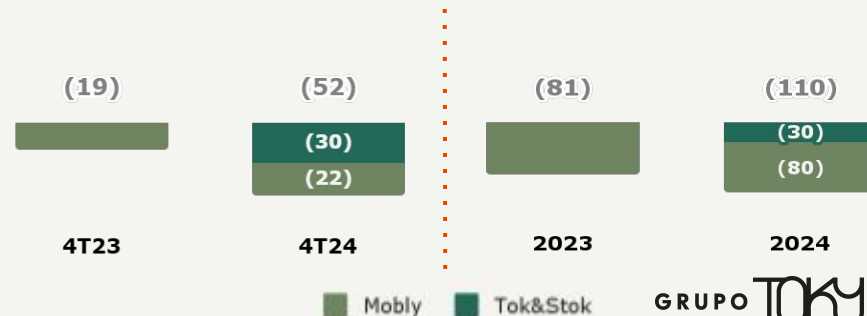
EBIT Ajustado

Em milhões de reais



Resultado Líquido Ajustado

Em milhões de reais



Nota: Valores T&S consolidados para Nov/24 e Dez/24

Agenda

bloco 1

Destaques

bloco 2

Crescimento

bloco 3

Rentabilidade

bloco 4

Atualização de Sinergias

bloco 5

Anexos



Evolução das Sinergias – Geração de Caixa



*Estimativa de até 5 anos

Agenda

bloco 1

Destques

bloco 2

Crescimento

bloco 3

Rentabilidade

bloco 4

Atualização de Sinergias

bloco 5

Anexos



Em R\$ Mil e em % da Receita

	4T24	4T23	Δ	2024	2023	Δ
GMV	208	214	-3%	809	773	5%
Receita	162	143	13%	600	542	11%
Custo das vendas	-92	-81	14%	-335	-307	9%
Lucro bruto	70	62	12%	265	235	13%
Margem de lucro bruto	43,2%	43,5%	-0,3 p.p	44,2%	43,4%	0,8 p.p
Despesas de Logística	-21	-18	13%	-82	-70	17%
CM II	49	44	12%	183	165	11%
Margem CM II	30,3%	30,6%	-0,3 p.p	30,6%	30,5%	0,1 p.p
Despesas de marketing e vendas	-21	-24	-15%	-90	-80	13%
CM III	28	19	46%	93	85	10%
Margem CM III	17,5%	13,5%	3,9 p.p	15,6%	15,7%	-0,1 p.p
Pessoal ²	-12	-11	5%	-47	-46	1%
Outras despesas gerais e administrativas ²	-4	-16	-76%	-39	-57	-32%
EBITDA Ajustado	13	-8	NA	8	-18	NA
Margem EBITDA Ajustada	8,0%	-5,4%	13,4 p.p	1,3%	-3,4%	4,7 p.p
D&A	-24	-13	84%	-76	-64	18%
Efeitos não-recorrentes	-40	-2	NA	-41	-4	NA
EBIT Ajustado	-11	-21	-47%	-68	-83	-18%
Resultado de juros	-11	2	NA	-12	1	NA
Resultado líquido	-62	-21	195%	-121	-85	42%
Margem líquida	-38,4%	-14,8%	-23,6 p.p	-20,2%	-15,7%	-4,5 p.p
Resultado líquido ajustado	-22	-19	17%	-80	-81	-2%
Margem líquida ajustada	-13,8%	-13,3%	-0,5 p.p	-13,3%	-15,0%	1,7 p.p

Em R\$ Mil e em % da Receita

	4T24	4T23	Δ	2024	2023	Δ
GMV	259		NA	259		NA
Receita	211		NA	211		NA
Custo das vendas	-102		NA	-102		NA
Lucro bruto	109		NA	109		NA
Margem de lucro bruto	51,7%		NA	51,7%		NA
Despesas de Logística	-23		NA	-23		NA
CM II	86		NA	86		NA
Margem CM II	40,9%		NA	40,9%		NA
Despesas de marketing e vendas	-15		NA	-15		NA
CM III	72		NA	72		NA
Margem CM III	33,9%		NA	33,9%		NA
Pessoal²	-15		NA	-15		NA
Outras despesas gerais e administrativas²	-32		NA	-32		NA
EBITDA Ajustado	25		NA	25		NA
Margem EBITDA Ajustada	11,7%		NA	11,7%		NA
D&A	-20		NA	-20		NA
Efeitos não-recorrentes	-18		NA	-18		NA
EBIT Ajustado	4		NA	4		NA
Resultado de juros	-34		NA	-34		NA
Resultado líquido	-47		NA	-47		NA
Margem líquida	-22,5%		NA	-22,5%		NA
Resultado líquido ajustado	-30		NA	-30		NA
Margem líquida ajustada	-14,2%		NA	-14,2%		NA

Em R\$ Mil e em % da Receita

	2024	2023	Δ
GMV	1.301	1.314	-1%
Receita	1.034	1.079	-4%
Custo das vendas	-474	-490	-3%
Lucro bruto	561	589	-5%
Margem de lucro bruto	54,2%	54,6%	-0,4 p.p
Despesas de Logística	-131	-138	-5%
CM II	429	451	-5%
Margem CM II	41,5%	41,8%	-0,3 p.p
Despesas de marketing e vendas	-84	-95	-11%
CM III	345	356	-3%
Margem CM III	33,3%	33,0%	0,3 p.p
Pessoal ²	-98	-112	-12%
Outras despesas gerais e administrativas ²	-211	-252	-17%
EBITDA Ajustado	36	-8	NA
Margem EBITDA Ajustada	3,5%	-0,7%	4,2 p.p
D&A	-123	-137	-10%
Efeitos não-recorrentes	-18	-34	-47%
EBIT Ajustado	-87	-144	-40%
Resultado de juros	-147	-167	-12%
Resultado líquido	-252	-345	-27%
Margem líquida	-24,3%	-32,0%	7,6 p.p
Resultado líquido ajustado	-234	-312	-25%
Margem líquida ajustada	-22,6%	-28,9%	6,3 p.p

Perguntas e respostas

Caso tenha alguma pergunta, **pressione o botão raise hand ou levantar a mão.**

Se, a qualquer momento, sua pergunta for respondida, aperte o mesmo botão para se retirar da fila. As perguntas serão respondidas à medida que forem recebidas.

Ao ser autorizado a falar, libere seu microfone.

Aviso Legal

As declarações contidas neste documento referentes a perspectivas de negócios, projeções de resultados operacionais e financeiros, bem como aquelas relacionadas às perspectivas de crescimento da Mobly, são meramente projeções e, como tal, baseiam-se unicamente nas expectativas da administração sobre o futuro do negócio. Essas expectativas dependem, substancialmente, das aprovações e licenças necessárias para a aprovação de projetos, das condições de mercado, do desempenho da economia brasileira, do setor e dos mercados internacionais e, portanto, estão sujeitas a alterações sem aviso prévio. Este relatório de desempenho inclui dados contábeis e não contábeis, como dados operacionais, financeiros, pró-forma e projeções baseadas nas expectativas da Administração da Empresa. Dados não contábeis não foram objeto de revisão pelos auditores independentes

da

Empresa



GRUPO TOKY



Earnings Presentation **4Q 24 and FY 24**

Schedule

block 1

Highlights

block 2

Growth

block 3

Profitability

block 4

Synergies Update

block 5

Appendix



New Group's solid growth
and profitability already
showing off

4Q24

GMV

+118.7% Y/Y

BRL **466.9 MM**

Net Revenue

+160.7% Y/Y

BRL **373.4 MM**

Gross Margin

+450 bps Y/Y

48.0%

CM II

+570% Y/Y

36.3%

CM III

+1,320 bps Y/Y

26.8%

Adj. EBIT

+R\$19 million Y/Y

BRL **-2.1 MM**

2024

GMV

+38.1% Y/Y

BRL **1.1 BN**

Net Revenue

+49.7% Y/Y

BRL **811.2 MM**

Gross Margin

+280 bps Y/Y

46.2%

CM II

+280% Y/Y

33.3%

CM III

+460 bps Y/Y

20.3%

Adj. EBIT

+R\$24 million Y/Y

BRL **-59.1 MM**

In BRL Thousand and in % of Revenue

	4Q24	4Q23	Δ	2024	2023	Δ
GMV	467	214	119%	1.067,7	773,0	38%
Revenue	373	143	161%	811,2	541,9	50%
Cost of Sales	-194	-81	140%	-437	-307	42%
Gross Profit	179	62	188%	374	235	59%
Gross Profit Margin	48,0%	43,5%	4,5 p.p	46,2%	43,4%	2,8 p.p
Fulfillment Expenses	-44	-18	136%	-105	-70	49%
CM II	136	44	209%	270	165	63%
CM II Margin	36,3%	30,6%	5,7 p.p	33,3%	30,5%	2,8 p.p
Mkt & Sales Expenses	-36	-24	46%	-105	-80	31%
CM III	100	19	416%	165	85	94%
CM III Margin	26,8%	13,5%	13,2 p.p	20,3%	15,7%	4,6 p.p
Personnel	-26	-11	137%	-61	-46	33%
Other G&A Expenses	-32	-16	97%	-67	-57	17%
Adj. EBITDA	42	-8	NA	37	-18	NA
Adj. EBITDA Margin	11,3%	-5,4%	16,7 p.p	4,6%	-3,4%	7,9 p.p
D&A	-44	-13	240%	-96	-64	49%
Extraordinary Revenues/Expenses	-58	-2	NA	-59	-4	NA
Adj. EBIT	-2	-21	-90%	-59	-83	-28%
Interest Result	-46	2	NA	-46	1	NA
Net Result	-105	-21	398%	-164	-85	93%
Net Margin	-28,2%	-14,8%	-13,4 p.p	-20,2%	-15,7%	-4,5 p.p
Adj. Net Result	-48	-19	151%	-105	-81	29%
Adj. Net Margin	-12,8%	-13,3%	0,5 p.p	-13,0%	-15,0%	2,0 p.p

Extraordinary Expenses:

- M&A fees: R\$40 million
- DIFAL and other: R\$19 million

Schedule

block 1

Highlights

block 2

Growth

block 3

Profitability

block 4

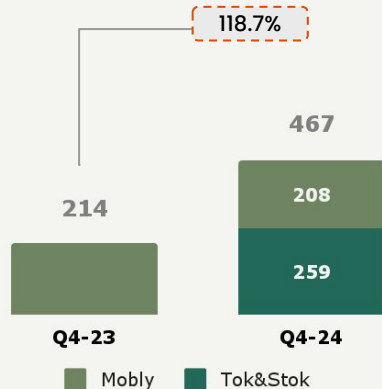
Synergies Update

block 5

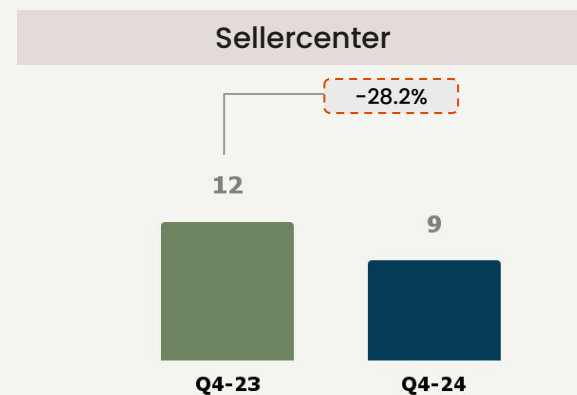
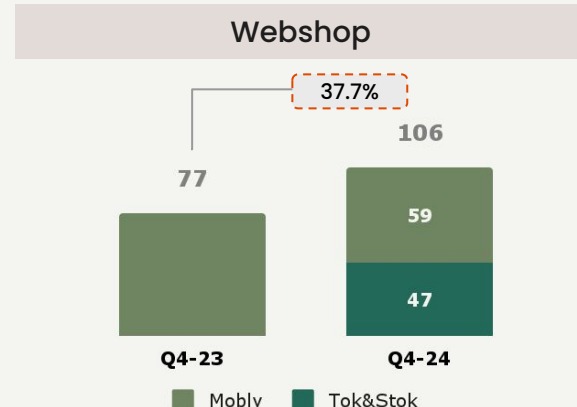
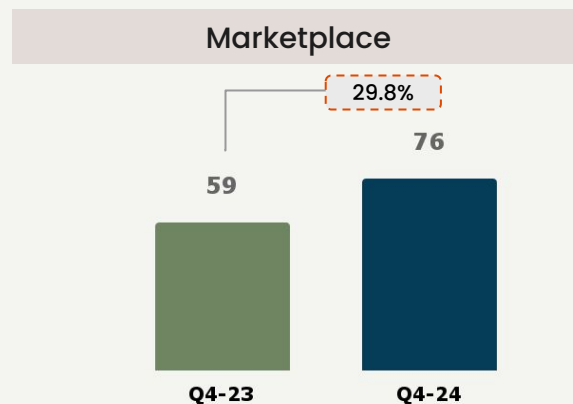
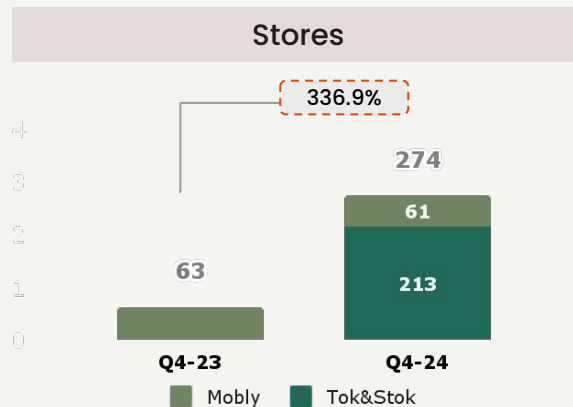
Appendix



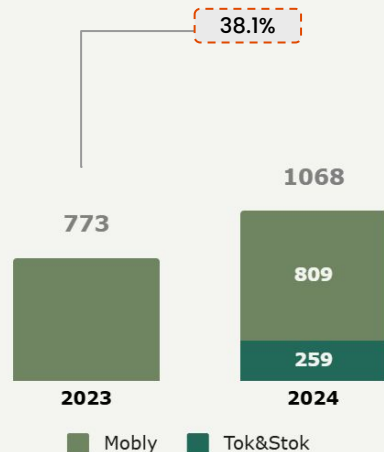
Gross Merchandise Value* – in BRL million



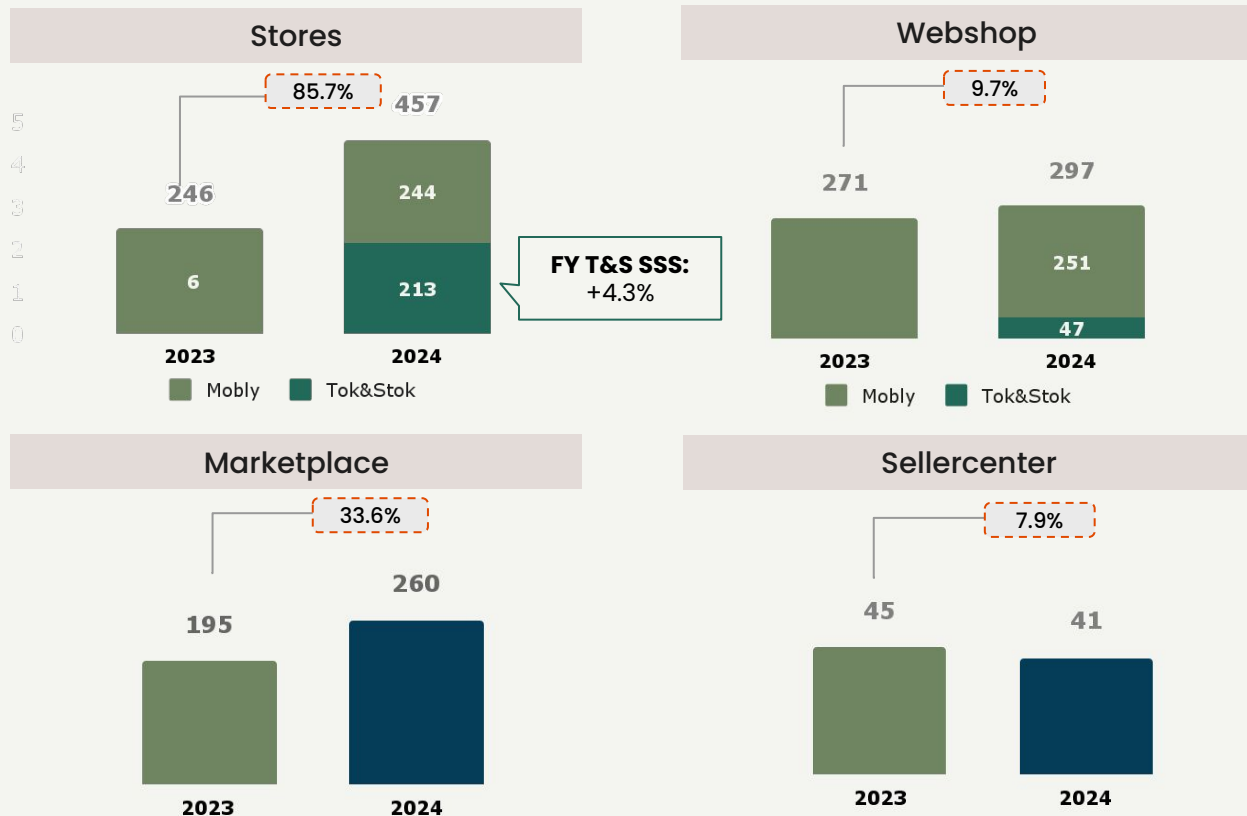
*Includes R\$3 million other revenues in both Q4 24 and Q4 23.



Gross Merchandise Value* – in BRL million



*Includes R\$13 million other revenues in 2024 and R\$17 million in 2023.



Note: T&S figures consolidated for Nov/24 and Dec/24.

Earnings Presentation – **4Q-2024**

Schedule

block 1

Highlights

block 2

Growth

block 3

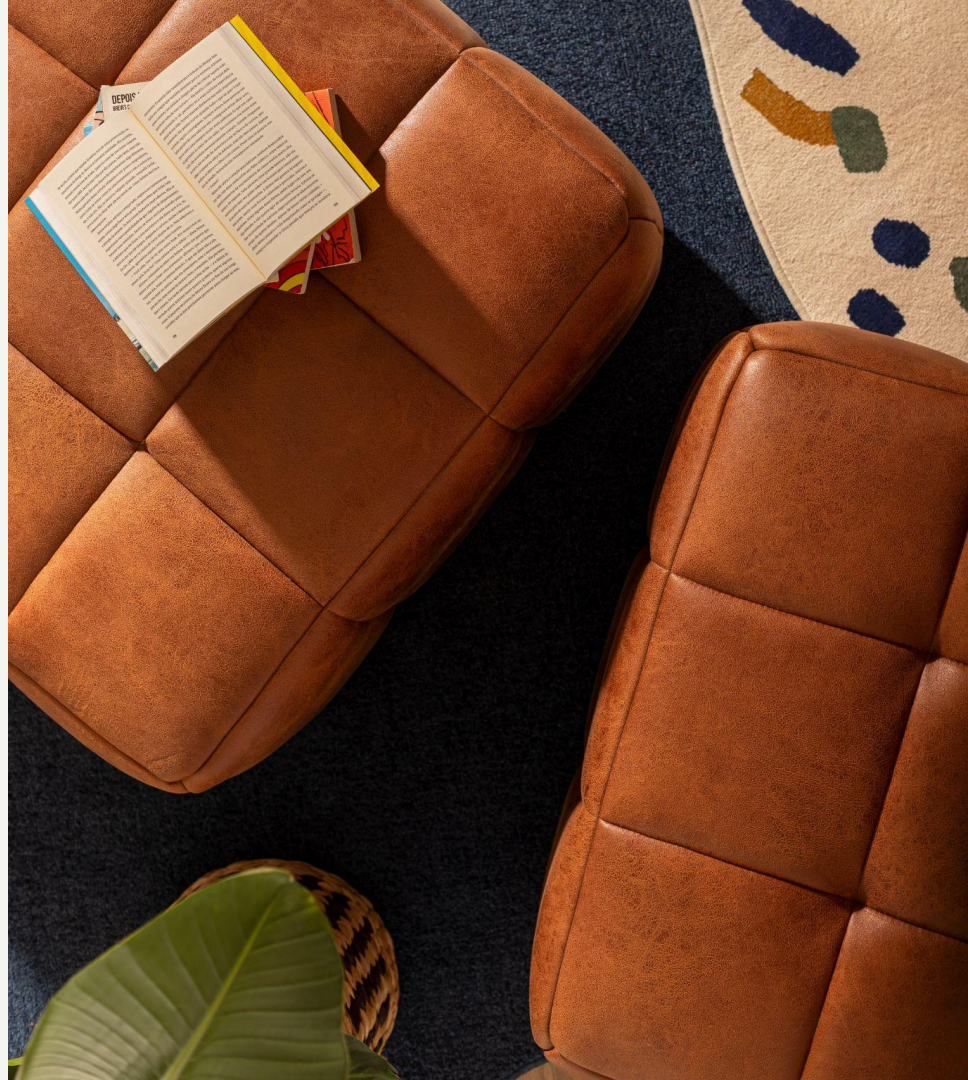
Profitability

block 4

Synergies Update

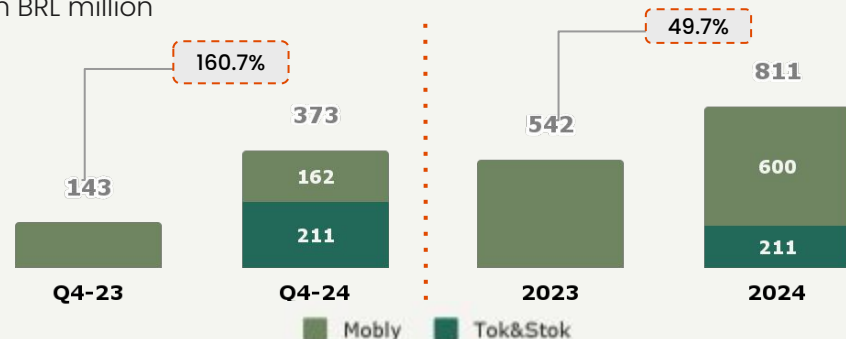
block 5

Appendix



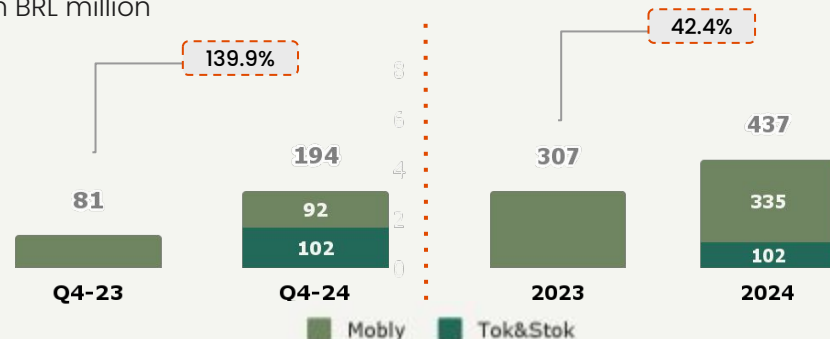
Net Revenue

In BRL million



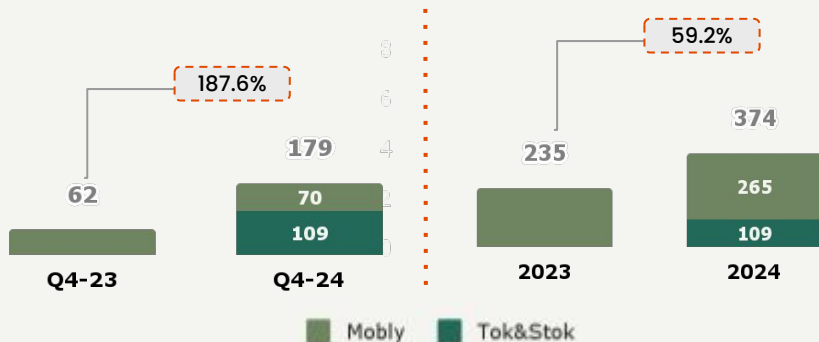
Cost of Goods Sold

In BRL million



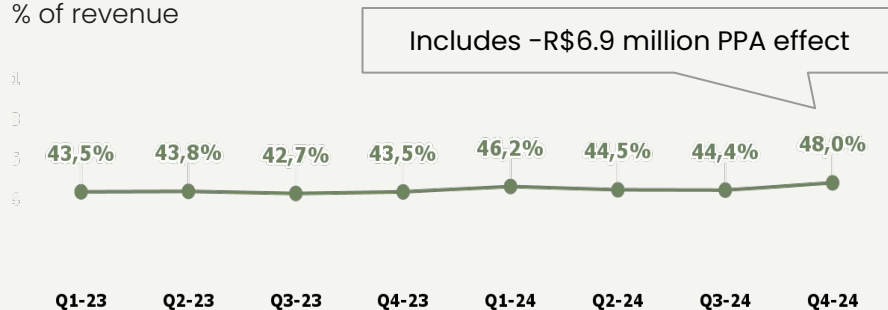
Gross Profit (Contribution Margin I)

In BRL million



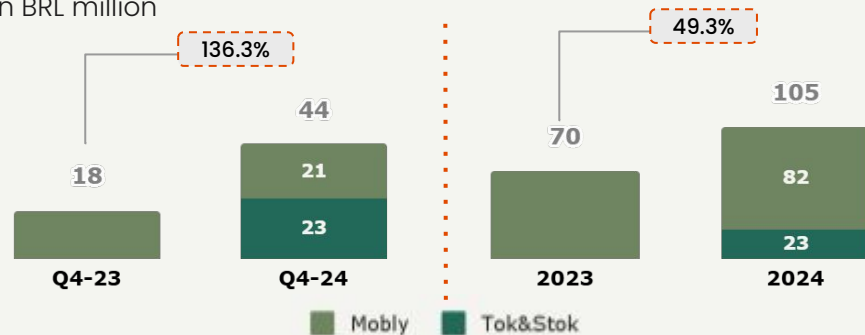
Gross Margin (Contribution Margin I)

% of revenue



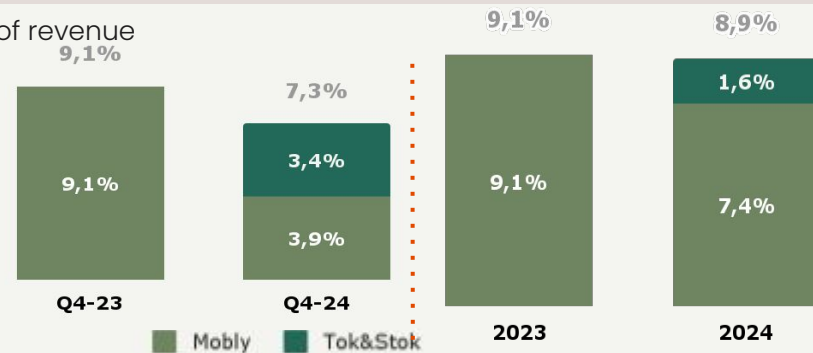
Fulfillment Costs

In BRL million



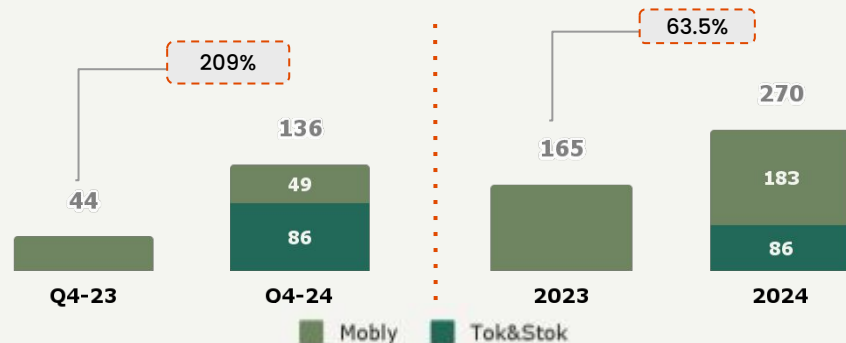
Shipment Costs

% of revenue



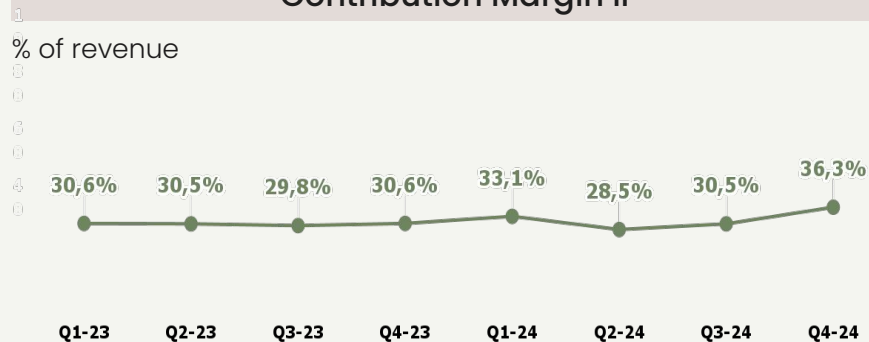
Contribution Margin II

In BRL million



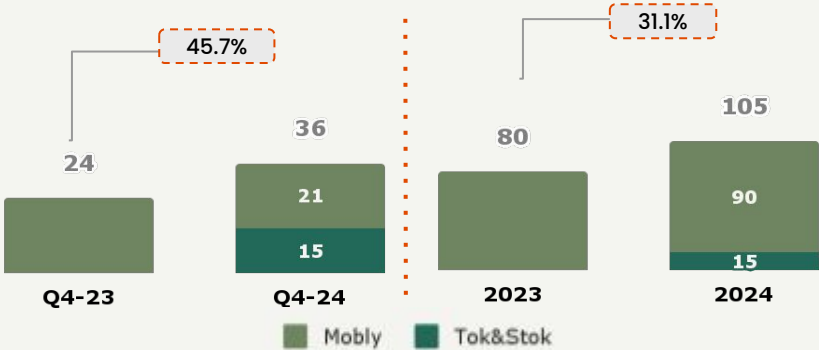
Contribution Margin II

% of revenue



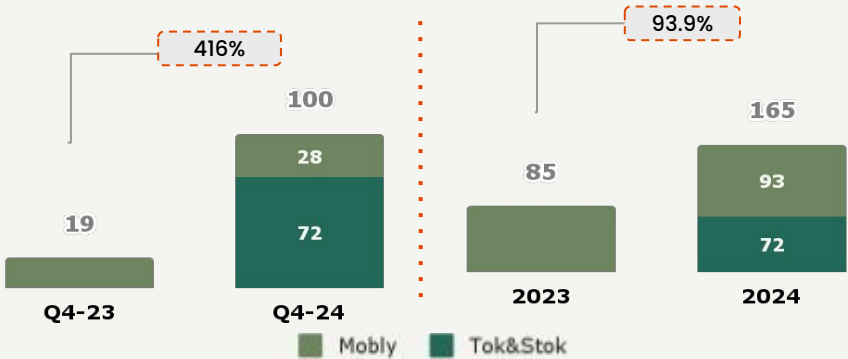
Marketing & Sales Expenses

In BRL million



Contribution Margin III

In BRL million

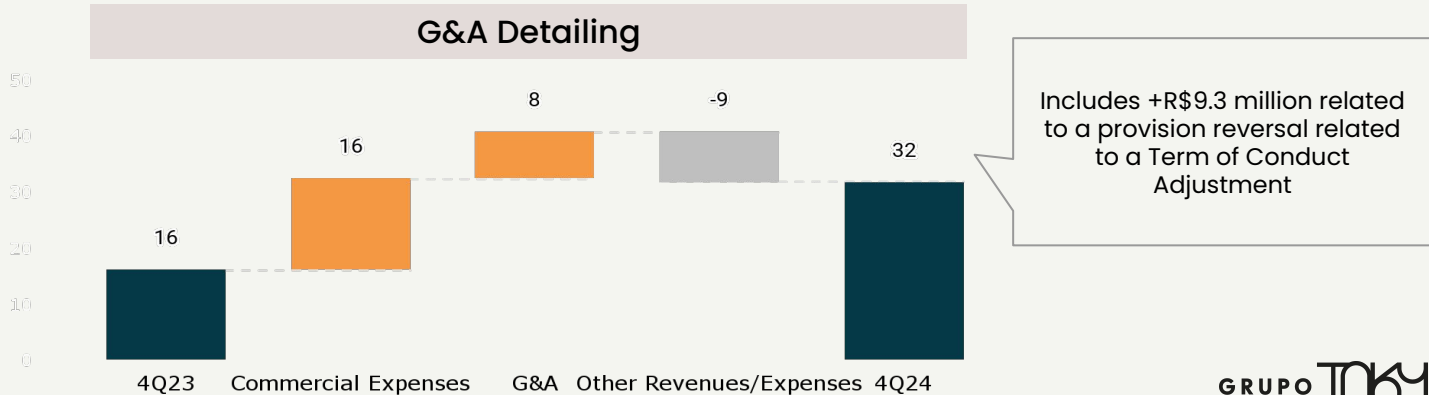
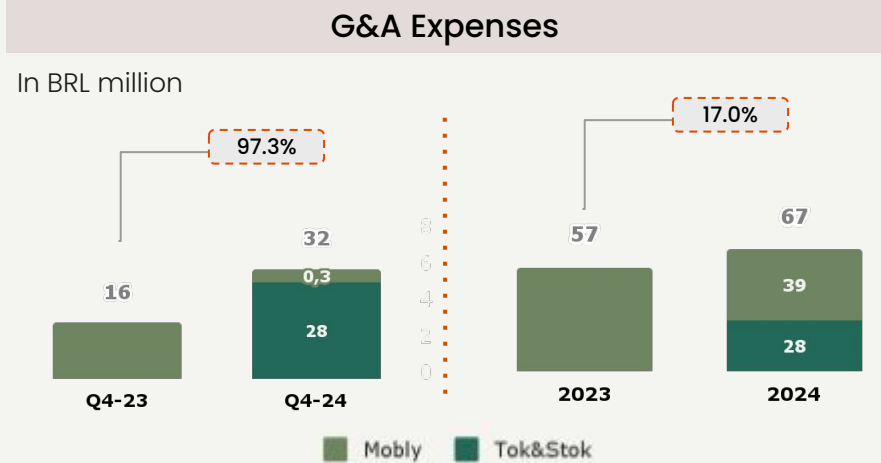
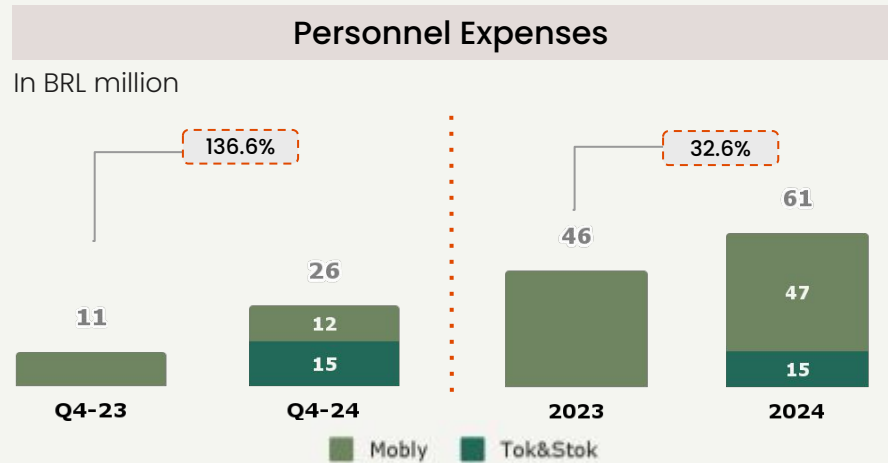


Contribution Margin III

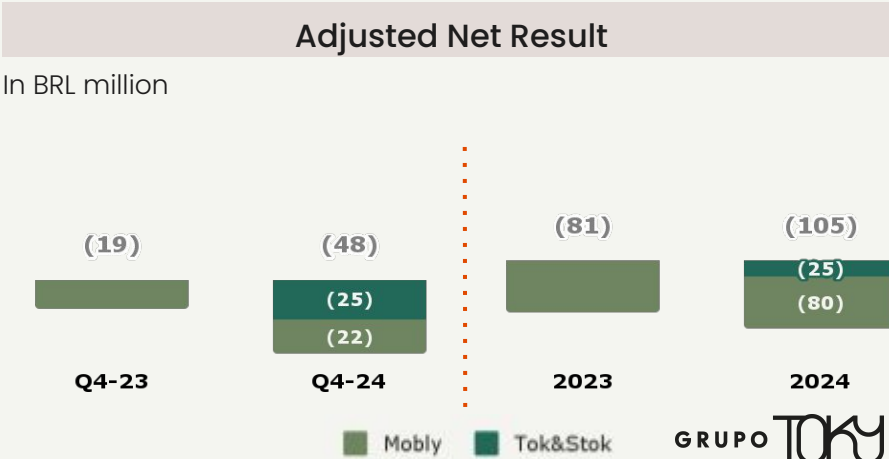
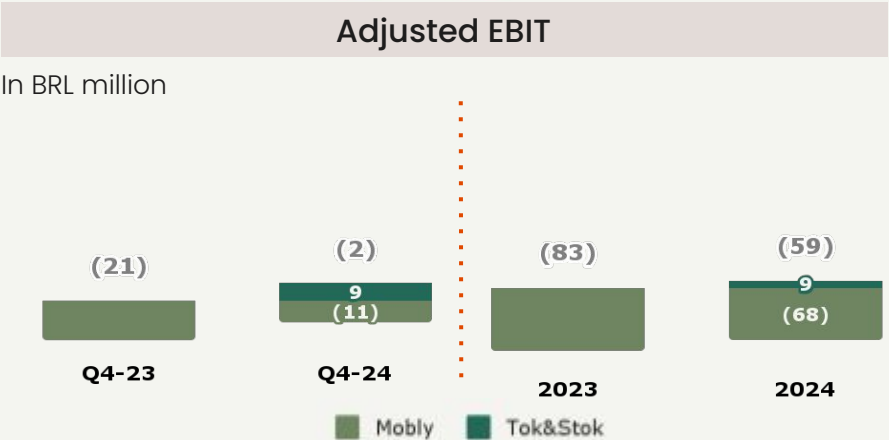
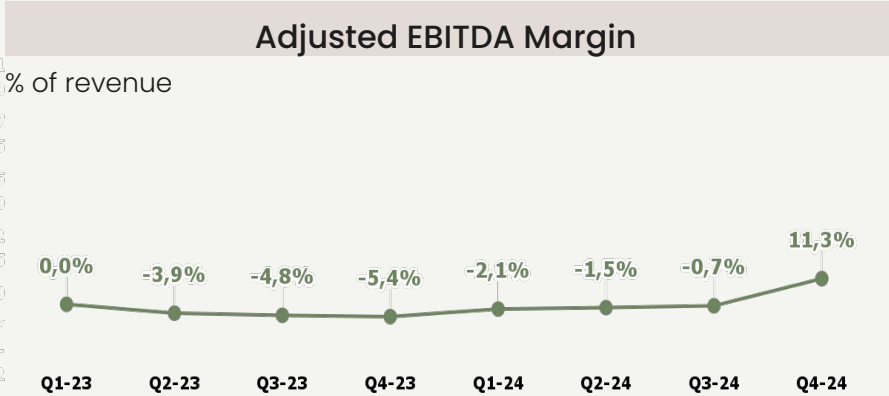
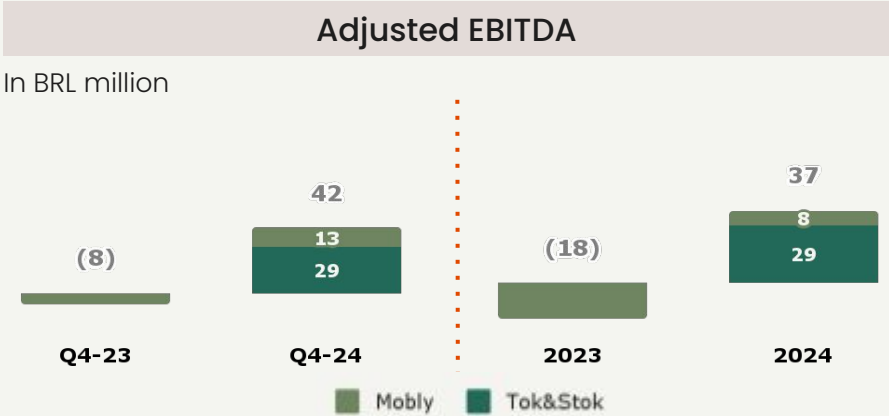
In BRL million



Note: T&S figures consolidated for Nov/24 and Dec/24.



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Schedule

block 1

Highlights

block 2

Growth

block 3

Profitability

block 4

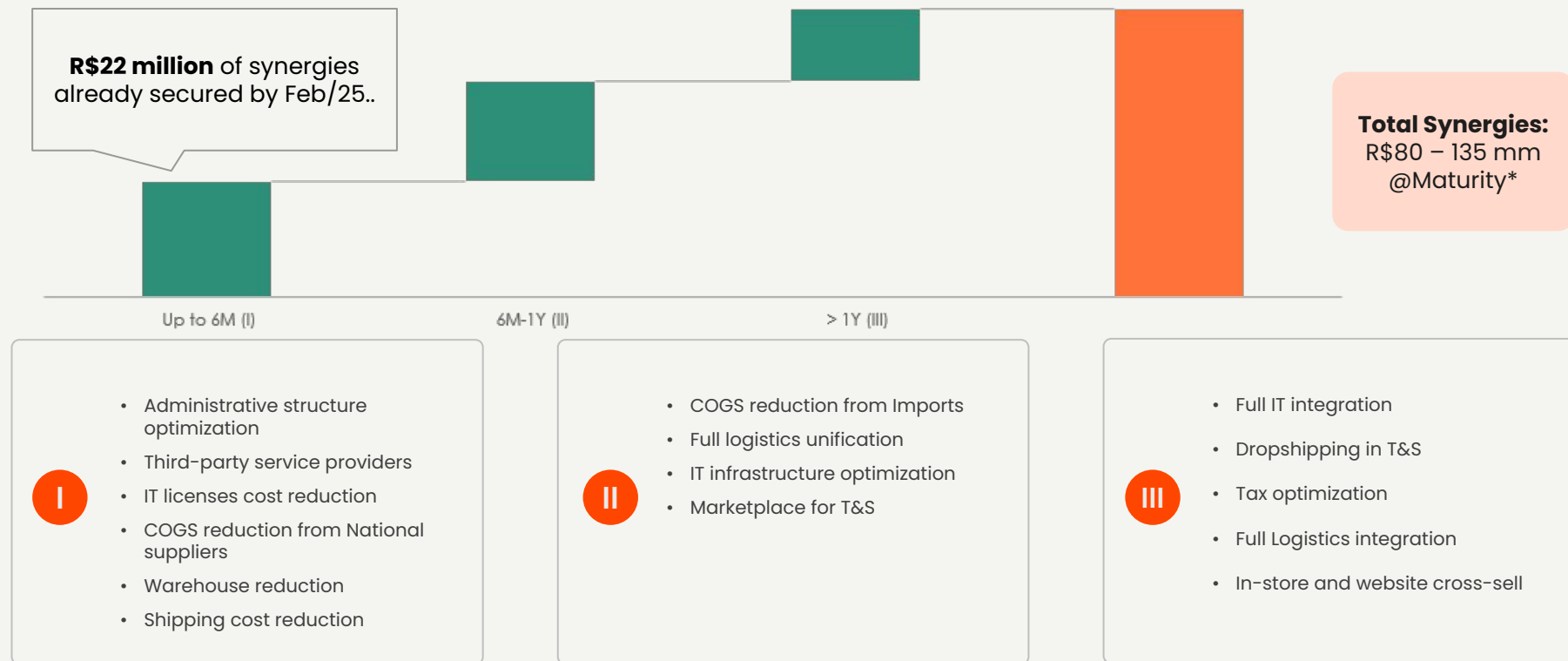
Synergies Update

block 5

Appendix



Synergies Evolution – Cash Flow Generation



*Estimate: up to 5 years.

Schedule

block 1

Highlights

block 2

Growth

block 3

Profitability

block 4

Synergies Update

block 5

Appendix



In BRL Thousand and in % of Revenue

	4Q24	4Q23	Δ	2024	2023	Δ
GMV	208	214	-3%	809	773	5%
Revenue	162	143	13%	600	542	11%
Cost of Sales	-92	-81	14%	-335	-307	9%
Gross Profit	70	62	12%	265	235	13%
Gross Profit Margin	43,2%	43,5%	-0,3 p.p	44,2%	43,4%	0,8 p.p
Fulfillment Expenses	-21	-18	13%	-82	-70	17%
CM II	49	44	12%	183	165	11%
CM II Margin	30,3%	30,6%	-0,3 p.p	30,6%	30,5%	0,1 p.p
Mkt & Sales Expenses	-21	-24	-15%	-90	-80	13%
CM III	28	19	46%	93	85	10%
CM III Margin	17,5%	13,5%	3,9 p.p	15,6%	15,7%	-0,1 p.p
Personnel	-12	-11	5%	-47	-46	1%
Other G&A Expenses	-4	-16	-76%	-39	-57	-32%
Adj. EBITDA²	13	-8	NA	8	-18	NA
Adj. EBITDA Margin	8,0%	-5,4%	13,4 p.p	1,3%	-3,4%	4,7 p.p
D&A	-24	-13	84%	-76	-64	18%
Extraordinary Revenues/Expenses	-40	-2	NA	-41	-4	NA
Adj. EBIT	-11	-21	-47%	-68	-83	-18%
Interest Result	-11	2	NA	-12	1	NA
Net Result	-62	-21	195%	-121	-85	42%
Net Margin	-38,4%	-14,8%	-23,6 p.p	-20,2%	-15,7%	-4,5 p.p
Adj. Net Result	-22	-19	17%	-80	-81	-2%
Adj. Net Margin	-13,8%	-13,3%	-0,5 p.p	-13,3%	-15,0%	1,7 p.p

In BRL Thousand and in % of Revenue

	4Q24	4Q23	Δ	2024	2023	Δ
GMV	259		NA	259		NA
Revenue	211		NA	211		NA
Cost of Sales	-102		NA	-102		NA
Gross Profit	109		NA	109		NA
Gross Profit Margin	51,7%		NA	51,7%		NA
Fulfillment Expenses	-23		NA	-23		NA
CM II	86		NA	86		NA
CM II Margin	40,9%		NA	40,9%		NA
Mkt & Sales Expenses	-15		NA	-15		NA
CM III	72		NA	72		NA
CM III Margin	33,9%		NA	33,9%		NA
Personnel	-15		NA	-15		NA
Other G&A Expenses	-28		NA	-28		NA
Adj. EBITDA²	29		NA	29		NA
Adj. EBITDA Margin	13,8%		NA	13,8%		NA
D&A	-20		NA	-20		NA
Extraordinary Revenues/Expenses	-18		NA	-18		NA
Adj. EBIT	9		NA	9		NA
Interest Result	-34		NA	-34		NA
Net Result	-43		NA	-43		NA
Net Margin	-20,4%		NA	-20,4%		NA
Adj. Net Result	-25		NA	-25		NA
Adj. Net Margin	-12,1%		NA	-12,1%		NA

In BRL Thousand and in % of Revenue

	2024	2023	Δ
GMV	1.301	1.314	-1%
Revenue	1.034	1.079	-4%
Cost of Sales	-474	-490	-3%
Gross Profit	561	589	-5%
Gross Profit Margin	54,2%	54,6%	-0,4 p.p
Fulfillment Expenses	-131	-138	-5%
CM II	429	451	-5%
CM II Margin	41,5%	41,8%	-0,3 p.p
Mkt & Sales Expenses	-84	-95	-11%
CM III	345	356	-3%
CM III Margin	33,3%	33,0%	0,3 p.p
Personnel	-98	-112	-12%
Other G&A Expenses	-184	-230	-20%
Adj. EBITDA²	63	15	331%
Adj. EBITDA Margin	6,1%	1,3%	4,7 p.p
D&A	-123	-137	-10%
Extraordinary Revenues/Expenses	-18	-34	-47%
Adj. EBIT	-60	-122	-50%
Interest Result	-147	-167	-12%
Net Result	-225	-323	-30%
Net Margin	-21,8%	-29,9%	8,2 p.p
Adj. Net Result	-207	-289	-28%
Adj. Net Margin	-20,0%	-26,8%	6,8 p.p

Q&A

If you have any questions. **press the button raise hand.** If. at any time. your question was answered. press the same button to remove yourself from the queue. Questions will be answered as they are received. **When authorized to speak release your microphone.**

Legal Warning

The statements contained in this document related to business prospects, projections of operating and financial results and those related to Grupo Toky's growth prospects are merely projections and, as such, are based solely on the management's expectations about the future of the business. These expectations depend, substantially, on the approvals and licenses necessary for the approval of projects, market conditions, performance of the Brazilian economy, the sector, and the international markets and, therefore, are subject to change without prior notice. This performance report includes accounting and non-accounting data, such as operational, financial, pro forma and projections based on the expectations of the Company's Management. Non-accounting data has not been subject to review by the Company's independent auditors.



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