

# Fact Sheet



### Company Profile

Founded in 2003, solutions by stc developed strong operational expertise and market-leading digital solutions in key technology verticals across the IT value chain. This supercharged its strategic ambition to become the digital solutions innovator.

### Strategy

solutions by stc’s refreshed LEAP 2.0 strategy targets significant economic value creation by strengthening its core business by emerging tech, innovation and operational excellence. To accomplish these goals, the Company focuses on the four main components:

- L – **Lead** through service excellence
- E – **Empower** business growth and diversification
- A – **Achieve** excellence in customer engagements
- P – **Promote** efficiencies and sustainability

### Product Offering

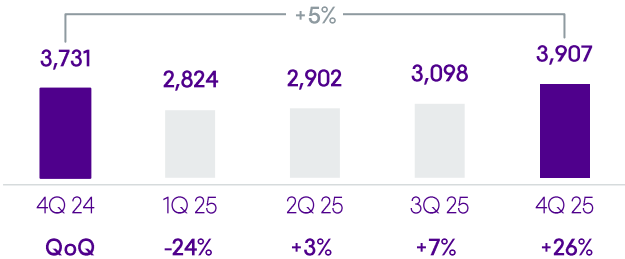
The principal activities of the Company are concentrated in the internet and telecommunications service sector:

- Core ICT Services**, which consists of System Integration; and Communication and Internet.
- IT Managed and Operational Services**, which consists of Outsourcing Services; and Managed Services.
- Digital Services**, which consists of Cloud Services; Cybersecurity integration; and Digital Transformation Services.

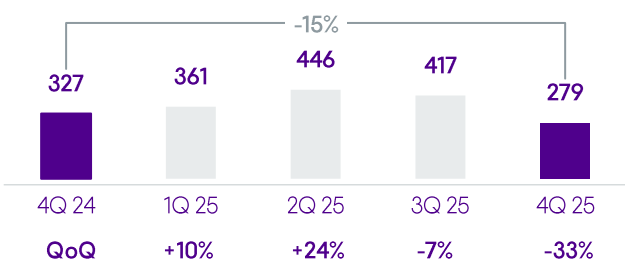
Key Figures ₪ (mn)	FY 2025	FY 2024	ΔYoY%
Revenue	12,730	12,064	+5.5%
Gross profit	2,678	2,783	-3.8%
Gross Profit Margin (%)	21.0%	23.1%	-2.0ppts
EBITDA	1,987	1,948	+2.0%
EBITDA Margin (%)	15.6%	16.1%	-0.5ppts
Net Profit	1,503	1,597	-5.9%
Net Profit Margin (%)	11.8%	13.2%	-1.4ppts
Capex	191	255	-25.1%
Free Cash Flow	(364)	1,187	-130.7%
Net Debt/(Cash)	(1,337)	(2,967)	-54.9%
ROIC	31.5%	34.3%	-2.8ppts
ROAE	36.2%	43.4%	-7.2ppts

Outlook	FY 2026 Guidance
Revenue Growth	6-8%
EBITDA Margin	14-16%
Capex intensity	2-3%

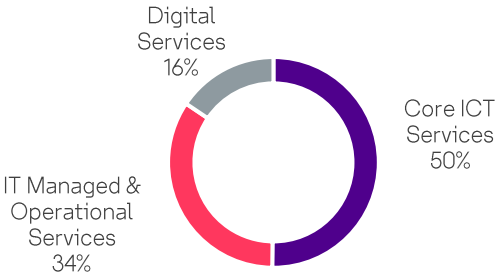
Revenue (₪ mn)



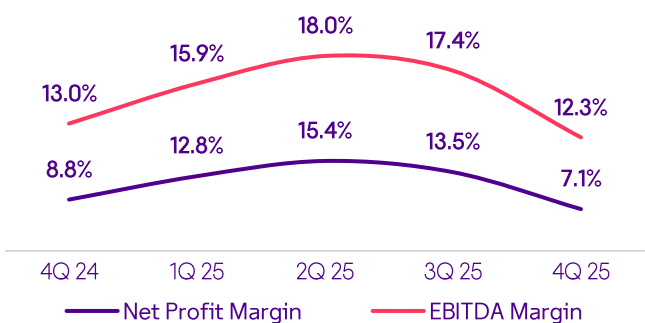
Net Profit (₪ mn)



### 2025 Revenue Composition by Segment



### EBITDA & Net Profit Margins (%)



# Fact Sheet



## Market Positioning

### KSA Pure Play

The majority of solutions revenue is generated in Saudi Arabia

### Public & Private Sector

solutions revenue mix is well diversified across various customer types with 33% coming from stc, 44% from the Government and 23% from private sector in FY 2025

### E2E solutions

solutions comprehensive portfolio offers a One-Stop-Shop approach covering the entire IT value chain

## Investment Thesis

### Leading Market Position in KSA

Clear market leader with consolidation opportunities in the fragmented IT market with a 20.1% share

### Sizeable and Diversified Portfolio

Strong pipeline of projects with over 220+ new contracts signed in FY 2025 and a winning ratio above 77%

### Superior Value Creation

31.5% ROIC in FY 2025 is well above the company’s cost of capital

### Asset-Light Business Model

Organic capex of 1.5% of revenue in FY 2025

### Strong FCF Generation

Solid track record of sustainable free cash flow generation supported by a resilient business model and strong execution

### Dividend

Company’s BoD recommended to pay out DPS of ﷼ 8 for FY 2025, implying a payout of 63% of net profit for FY 2025

### Efficient Capital Allocation

High-return organic capex, value-accretive M&As, high-potential partnerships and PPP projects, sustainable dividend payouts

### Robust Balance Sheet

Strong net cash position, efficient WC management

## Looking for additional information?

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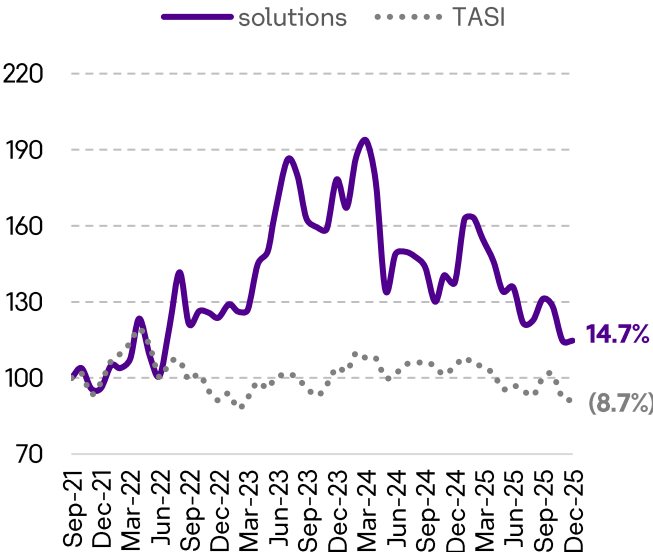
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## solutions by stc - Key Metrics

	﷼
IPO offering price	151.0
Closing Price at 30 September 2021	196.2
Closing Price at 31 December 2025	225.1
Market Cap at 31 December 2025	27.0 bn
Price / Earnings (LTM)	17.9x
EV / EBITDA (LTM)	12.9x

Sources: S&P Capital IQ Pro; Tadawul; solutions by stc financial reports

## solutions share price vs Tadawul (rebased to 100)



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