Nasdaq: ALNT

November 5, 2026

Third Quarter Fiscal Year 2026 Financial Results Call

Dick Warzala
Chairman, President & CEO

Jim Michaud
Chief Financial Officer

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SAFE HARBOR STATEMENT

The statements in this presentation that relate to future plans, events or performance are "forward-looking statements" within the meaning of the Private Securities Litigation Reform Act of 1995. Forward-looking statements include, without limitation, any statement that may predict, forecast, indicate, or imply future results, performance, or achievements. Examples of forward-looking statements include, among others, statements the Company makes regarding expected savings from restructuring and simplifying actions, the cost of implementing such actions, operating results, expectations for the level of sales, the Company's belief that it has sufficient liquidity to fund its business operations, and expectations with respect to the conversion of backlog to sales. Forward-looking statements are neither historical facts nor assurances of future performance. Instead, they are based only on the Company's current beliefs, expectations and assumptions regarding the future of the Company's business, future plans and strategies, projections, anticipated events and trends, the economy and other future conditions. Because forward-looking statements relate to the future, they are subject to inherent uncertainties, risks and changes in circumstances that are difficult to predict and many of which are outside of the Company's control. The Company's actual results and financial condition may differ materially from those indicated in the forward-looking statements. Therefore, you should not rely on any of these forward-looking statements. Important factors that could cause our actual results and financial condition to differ materially from those indicated in the forward-looking statements include, among others, general economic and business conditions, conditions affecting the industries served by the Company and its subsidiaries, conditions affecting the Company's customers and suppliers, competitor responses to the Company's products and services, the overall market acceptance of such products and services, the pace of bookings relative to shipments, the ability to expand into new markets and geographic regions, the success in acquiring new business, the impact of changes in income tax rates or policies, commercial activity and demand across our and our customers' businesses, global supply chains, the prices of our securities and the achievement of our strategic objectives, the ability to attract and retain qualified personnel, the ability to successfully integrate an acquired business into our business model without substantial costs, delays, or problems, and other factors disclosed in the Company's periodic reports filed with the Securities and Exchange Commission. Any forward-looking statement speaks only as of the date on which it is made. New risks and uncertainties arise over time, and it is not possible for us to predict the occurrence of those matters or the manner in which they may affect us. The Company has no obligation or intent to release publicly any revisions to any forward-looking statements, whether as a result of new information, future events, or otherwise.

This presentation will discuss some non-GAAP financial measures, which the Company believes are useful in evaluating our performance. You should not consider the presentation of this additional information in isolation or as a substitute for results prepared in accordance with GAAP. The Company has provided reconciliations of comparable GAAP to non-GAAP measures in tables found in the Supplemental Information portion of this presentation.

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Q3 HIGHLIGHTS:

BREAKOUT QUARTER ACROSS THE P&L AND ORDER BOOK

Record Revenue **$164.4M** *+18% YoY*	Record Net Income **$15.3M** *+137% YoY*
Record Gross Margin **36.6%** *+330bps YoY*	Record Orders **$218.1M** *+64% YoY*
Record Operating Margin **13.6%** *+480bps YoY*	Record Backlog **$351.5M** *+52% YoY*

Volume, mix and operational improvements drove strong operating leverage and accelerated earnings growth

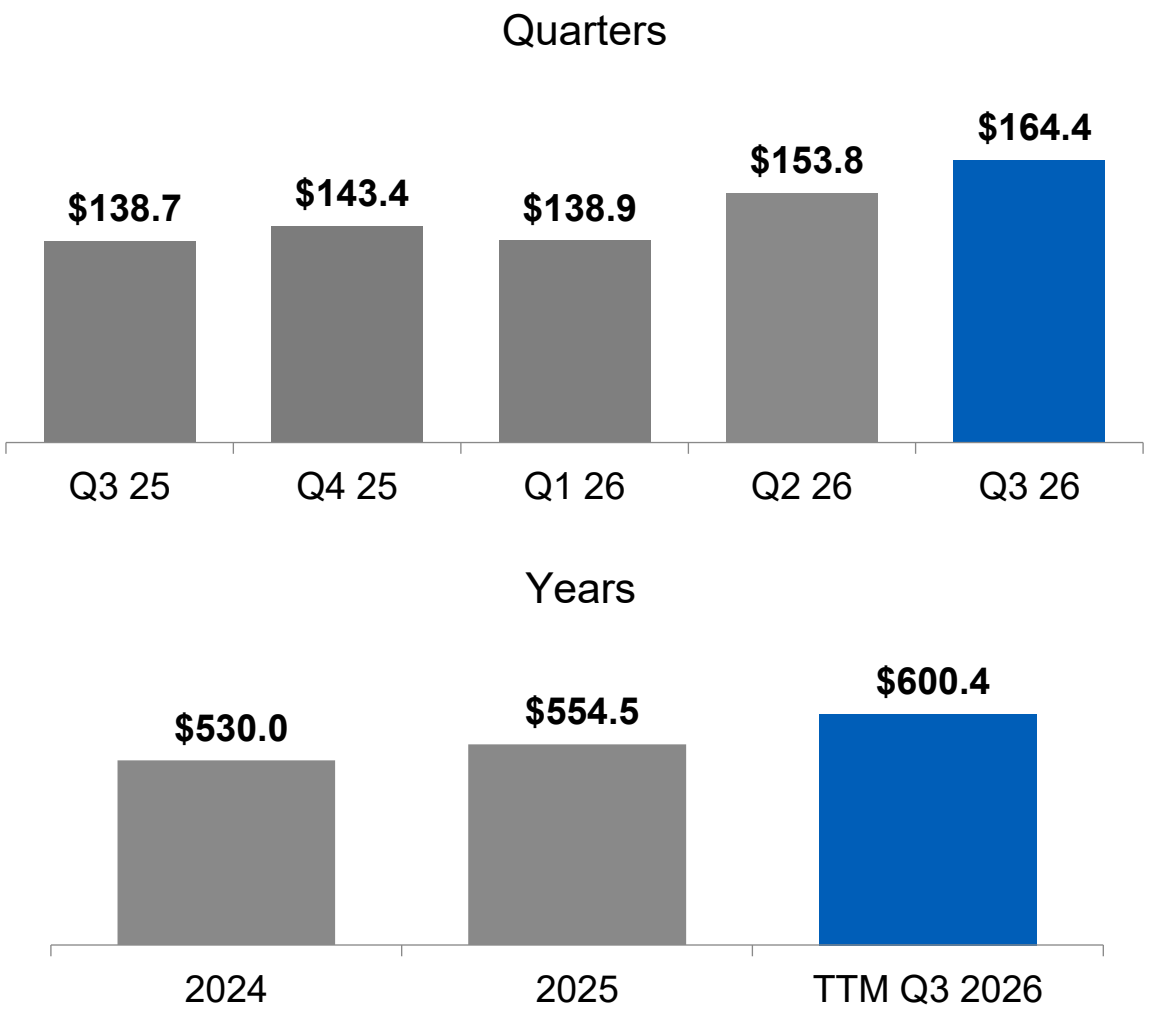
STAN is converting higher demand into improved profitability while funding investment in capacity, technology and productivity

Record orders and backlog provide positive outlook as we move into the fourth quarter and early 2027

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DOUBLE-DIGIT REVENUE GROWTH

($ in millions; narrative compared with prior-year period unless otherwise noted)



19% organic growth in Q3 (constant currency); FX headwind of $0.9M

Q3 26 market performance (YoY)

- **+ 36% A&D** (strong defense-related demand and program timing)
- **+ 27% Vehicle** (commercial automotive demand plus accelerated shipments)
- **+ 15% Industrial** (data center and infrastructure & industrial automation)
- **- 2% Medical** (higher surgical application demand offset by medical mobility)

Q3 data center and infrastructure related sales: $21.1M or 12.9% of total sales

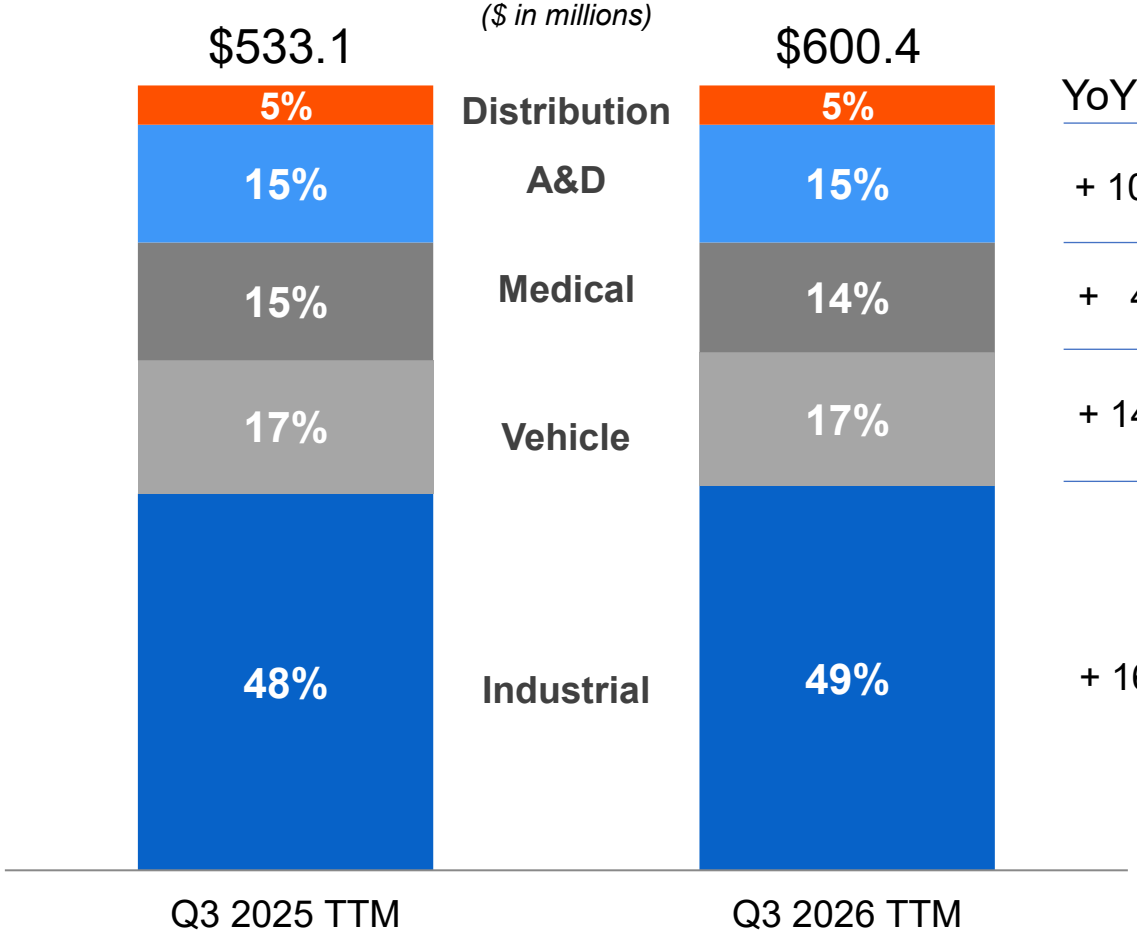
57% of Q3 26 sales to U.S. customers

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BALANCED EXPOSURE AND GLOBAL FOOTPRINT SUPPORTS DURABLE GROWTH

TTM Revenue by Market

($ in millions)



NOTE: Components may not add to totals due to rounding

YoY Change and Market Drivers

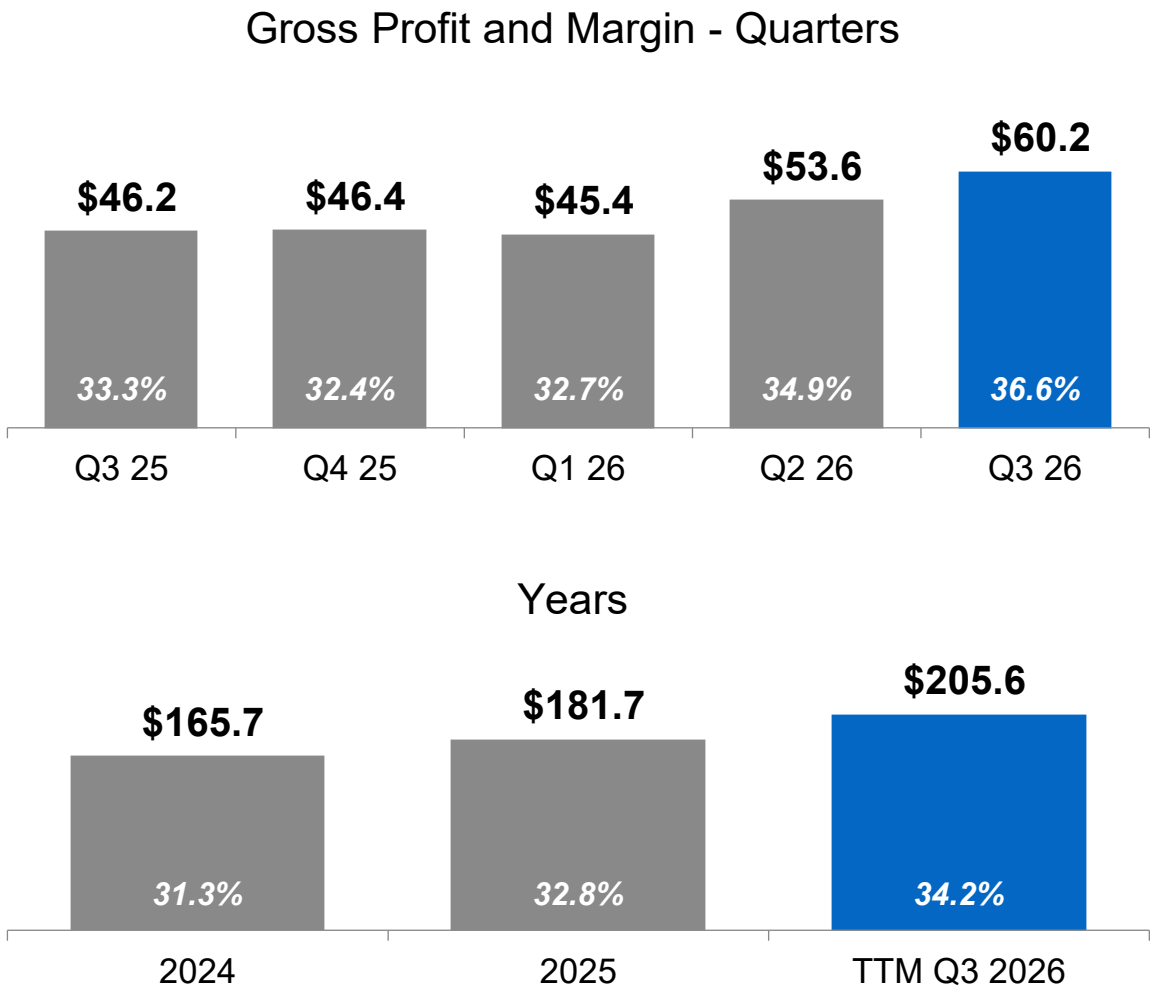
+ 10%	Mission-critical defense demand and favorable program timing
+ 4%	Surgical precision motion growth, partially offset by medical mobility
+ 14%	Commercial automotive, truck and construction strength
+ 16%	Continued strong demand for industrial automation and solutions supporting data center and infrastructure

TTM data center and infrastructure related sales: $63.2M or 10.5% of total sales

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VOLUME, MIX AND STAN DRIVE RECORD GROSS MARGIN

($ in millions; narrative compared with prior-year period unless otherwise noted)



Q3 margin expanded 330 bps YoY to a record 36.6%

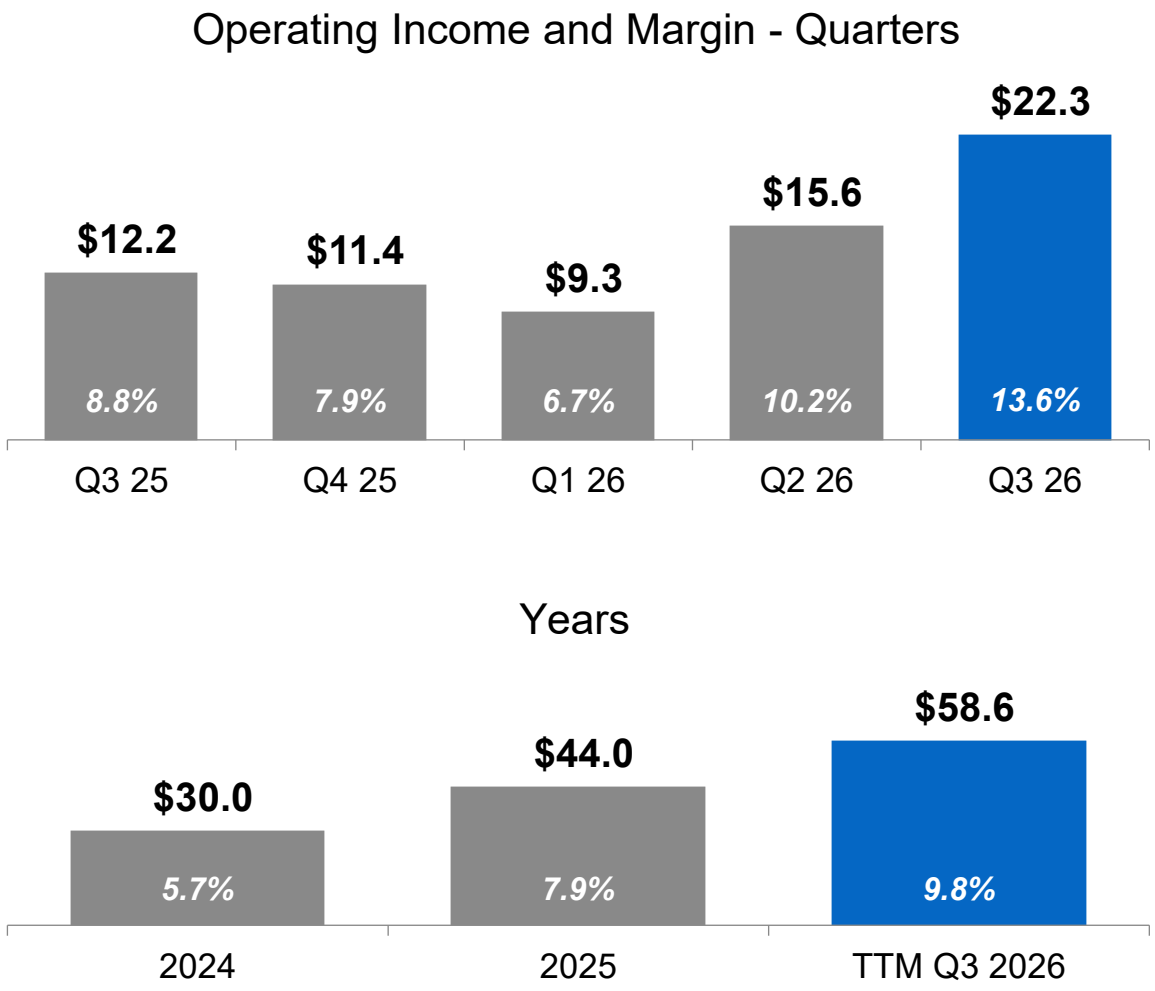
- \+ Higher volume
- \+ Favorable Mix
- \+ Simplify to Accelerate NOW
- \+ Lean tool kit (AST)

Steady execution on simplification, lean tools and productivity is building a more scalable margin profile

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RECORD OPERATING MARGIN REFLECTS LEVERAGE AND EXECUTION

($ in millions; narrative compared with prior-year period unless otherwise noted)



Q3 margin expanded 480 bps YoY to a record 13.6%

Operating costs improved 150 bps to 23.0% of revenue, demonstrating leverage despite growth-related spending

Restructuring costs were $15K vs. $0.8M on lower Dothan transition costs and the timing of other STAN initiatives

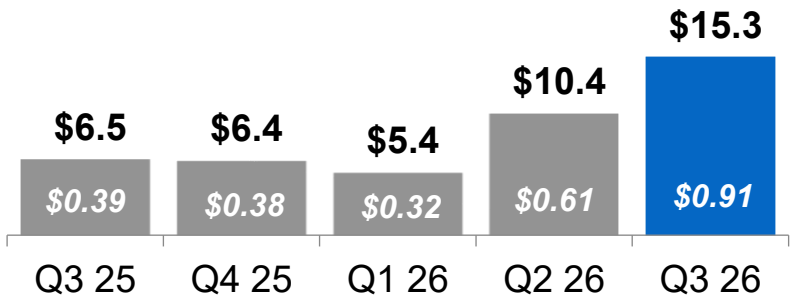
FY26 restructuring expected to be ~$2M ($1.5M spent YTD)

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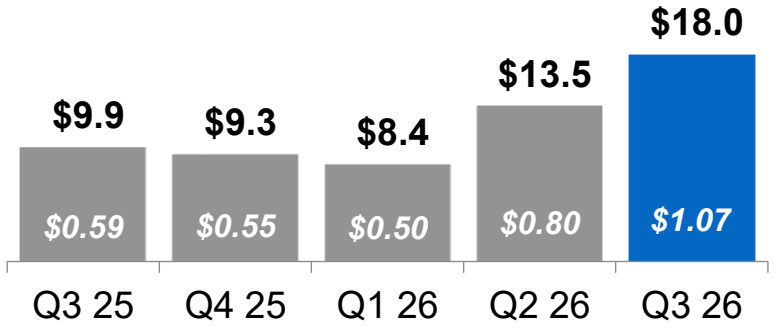
MARGIN EXPANSION AND LOWER INTEREST EXPENSE MORE THAN DOUBLED NET INCOME

($ in millions, except per share data)

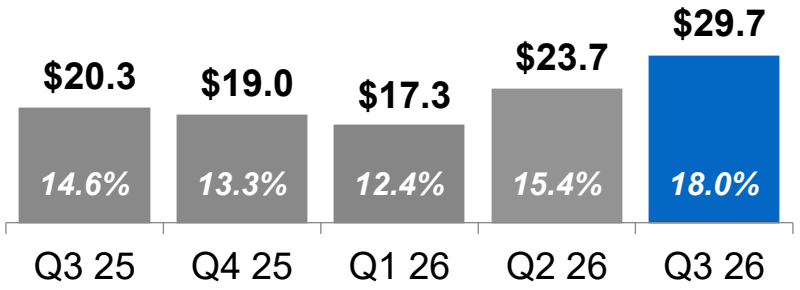
GAAP Net Income & EPS

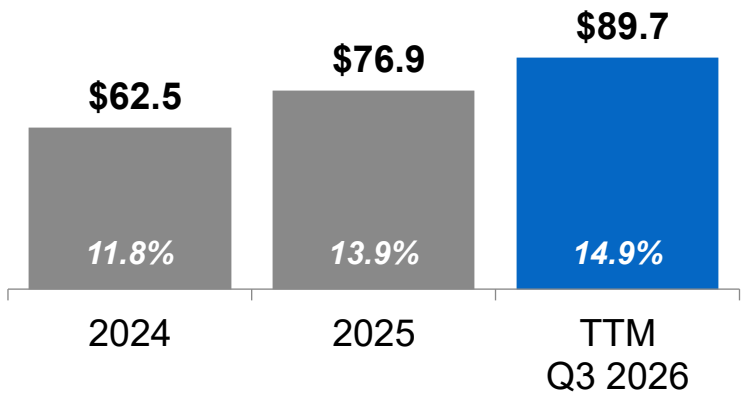


Adjusted Net Income & Adjusted EPS[1]



Adjusted EBITDA[1] and Margin





Interest expense decreased 27% YoY to $2.5 million, due to lower average debt balances

Q3 YoY growth:

Net income	+137%
Adj. Net income[(1)]	+82%
Adj. EBITDA[(1)]	+46%

Full-Year 2026 expected tax rate: ~21%–23%

Adjusted net income excludes amortization of intangible assets related to acquisitions, acquisition and integration-related costs, restructuring and business realignment costs, and other non-recurring items

[(1)]See supplemental slides for Adjusted Net Income and Adjusted EBITDA reconciliations and other important disclaimers

NOTE: Components may not add up to totals due to rounding

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INVESTING IN GROWTH WHILE PRIORITIZING CASH CONVERSION

($ in millions)

	Three Months Ended		Nine Months Ended	
	9/30/26	9/30/25	9/30/26	9/30/25
Net cash provided by operating activities	$ 2.0	$ 4.7	$ 22.1	$ 43.1
Capital expenditures (CapEx)	(3.6)	(1.9)	(10.6)	(5.1)
Operating free cash flow (FCF)[1]	**$ (1.6)**	**$ 2.8**	**$ 11.4**	**$ 38.0**

Q3 operating cash flow reflects receivables timing and strategic inventory to support record demand

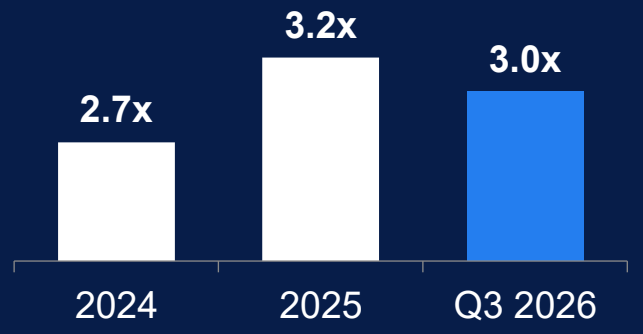
FY26 CapEx Expectation: $12 million – $15 million

[1] Free cash flow is a non-GAAP metric defined as cash flow from operations, less capital expenditures
NOTE: Components may not add up to totals due to rounding

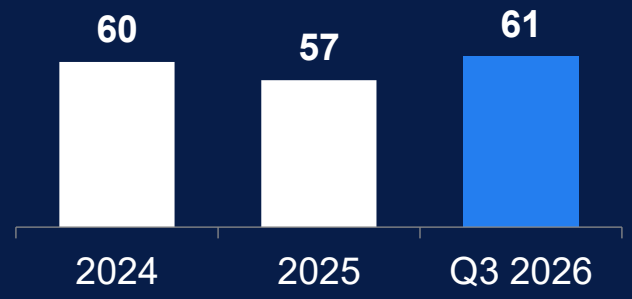
Financial priorities:

1. Reduce inventory and strengthen working capital management
2. Take out costs
3. Reduce debt

Inventory Turnover



Days Sales Outstanding



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LOWER LEVERAGE AND STRONG LIQUIDITY ENHANCE FINANCIAL FLEXIBILITY

($ in millions)

CAPITALIZATION		
	Sept 30, 2026	Dec 31, 2025
Cash and cash equivalents	$ 39.6	$ 40.7
Total debt	173.4	180.4
Total net debt	**133.7**	**139.7**
Shareholders' equity	327.2	301.5
Total capitalization	**$ 500.6**	**$ 481.8**
Debt/total capitalization	34.6%	37.4%
Net debt/net total capitalization	29.0%	31.7%
Leverage ratio[1]	1.49x	1.82x
Bank leverage ratio[2]	1.89x	2.35x

Debt down $7.0M YTD

$162.0 million of unused revolver capacity

Bank leverage ratio[2] well within covenant requirements

[1] Leverage ratio calculated as total net debt divided by trailing twelve months of Adjusted EBITDA. See supplemental slides for reconciliations.

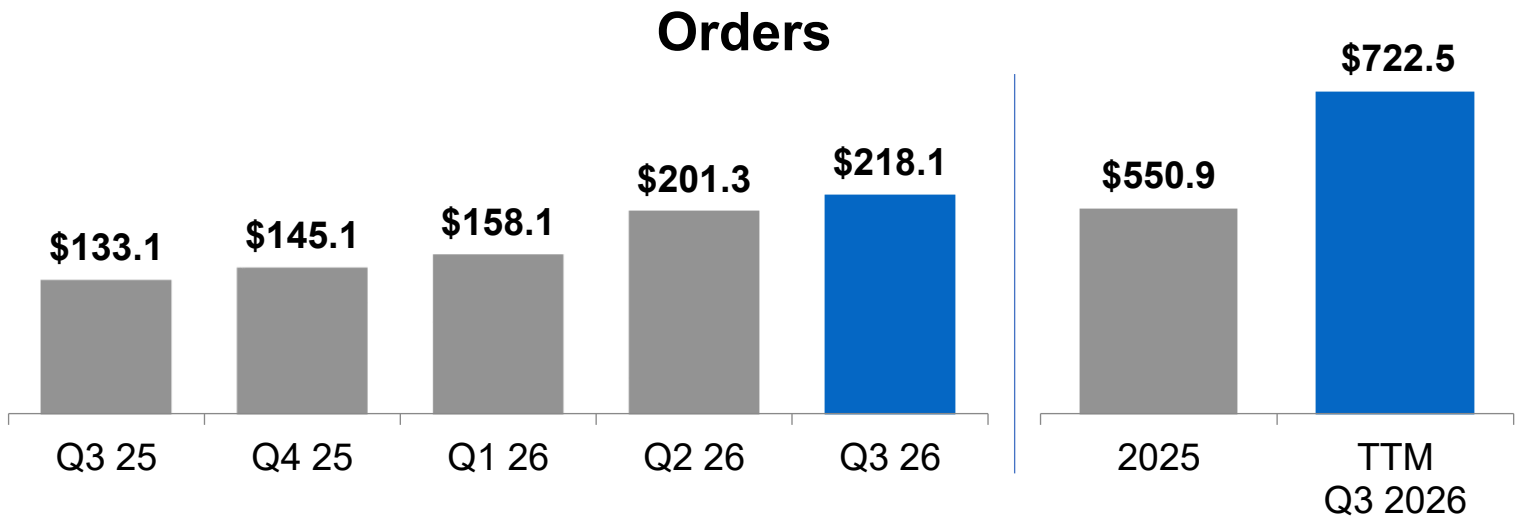
[2] Bank leverage ratio calculated in accordance with the Company's credit agreement, which amongst other items excludes foreign cash.

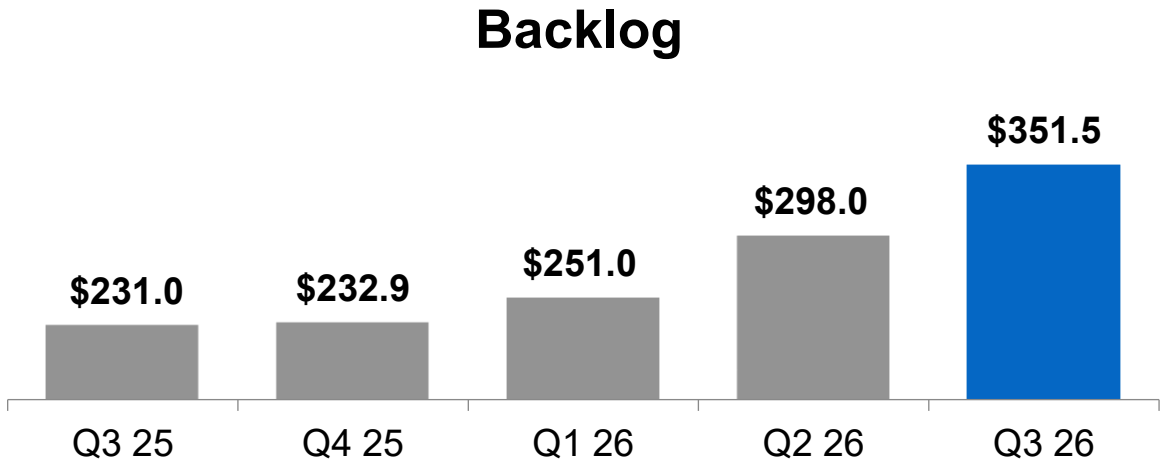
NOTE: Components may not add up to totals due to rounding

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RECORD ORDERS AND BACKLOG EXTEND VISIBILITY INTO EARLY 2027

($ in millions)





Q3 Book:Bill 1.33x

Orders increased 64% YoY and 8% sequentially, with strength led by Industrial and Aerospace & Defense

Record backlog up 52% YoY and 18% sequentially, with most expected to convert within six to twelve months

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BUILDING ON RECORD PERFORMANCE WITH A STRONGER, MORE SCALABLE ALLIENT



Proven Earnings Power

- Record revenue, margins and orders demonstrate the operating leverage in our model
- STAN is embedded in how we work, driving continued gains in mix, productivity and execution

Targeted Growth Vectors

- Data center and infrastructure is a growing contributor, now more than 10% of TTM sales
- A&D momentum is building, and our drone and unmanned systems offering continues to advance
- We're focused on higher-value motion, controls and power solutions that deepen customer partnerships

Positioned for 2027

- Record backlog of $351.5M provides a positive outlook as we move into early 2027
- Near-term priorities are converting backlog, support for our internal growth opportunities and to maintain our disciplined approach to investments
- Building momentum with stronger earnings power

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CONFERENCE CALL AND WEBCAST PLAYBACK

Replay Number: **412-317-6671** *passcode:* ***13762680***

Telephone replay available through Thursday, November 19, 2026

Webcast / Presentation / Replay available at
www.allient.com/investors

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Supplemental Information

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ADJUSTED NET INCOME RECONCILIATION

($ in thousands, except per share data)

	For the three months ended				
	Sept 30, 2025	**Dec 31, 2025**	**Mar 31, 2026**	**June 30, 2026**	**Sept 30, 2026**
Net income	$ 6,477	$ 6,383	$ 5,357	$ 10,391	$ 15,325
Non-GAAP adjustments, net of tax (1)					
Amortization of intangible assets - net	2,399	2,391	2,392	2,400	2,388
Foreign currency loss – net	356	80	15	263	283
Acquisition and integration-related costs – net	13	5	-	-	-
Restructuring and business realignment costs - net	640	412	660	491	11
Non-GAAP Adjusted Net Income	**$ 9,885**	**$ 9,271**	**$ 8,424**	**$ 13,545**	**$ 18,007**
Average Diluted Shares Outstanding	16,780	16,803	16,879	16,875	16,903
Diluted earnings per share	$ 0.39	$ 0.38	$ 0.32	$ 0.61	$ 0.91
Adjusted diluted earnings per share	$ 0.59	$ 0.55	$ 0.50	$ 0.80	$ 1.07

(1) Applies a blended federal, state, and foreign tax rate of 23% applicable to the non-GAAP adjustments.

Adjusted net income and diluted EPS are defined as net income as reported, adjusted for certain items, including amortization of intangible assets and unusual non-recurring items. Adjusted net income and diluted EPS are not a measure determined in accordance with GAAP in the United States, and may not be comparable to the measure as used by other companies. Nevertheless, the Company believes that providing non-GAAP information, such as adjusted net income and diluted EPS are important for investors and other readers of the Company's financial statements and assists in understanding the comparison of the current quarter's and current year's net income and diluted EPS to the historical periods' net income and diluted EPS.

NOTE: Components may not add up to totals due to rounding

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ADJUSTED NET INCOME RECONCILIATION

($ in thousands, except per share data)

	For twelve months ended		
	Dec 31, 2024	Dec 31, 2025	Sept 30, 2026
Net income	$ 13,166	$ 22,034	$ 37,456
Non-GAAP adjustments, net of tax (1)			
Amortization of intangible assets - net	9,726	9,553	9,571
Foreign currency loss / (gain) – net	(64)	1,592	641
Acquisition and integration-related costs – net	341	36	5
Restructuring and business realignment costs - net	1,510	3,059	1,574
Non-GAAP Adjusted Net Income	**$ 24,679**	**$ 36,274**	**$ 49,247**
Average Diluted Shares Outstanding	16,603	16,732	16,865
Diluted earnings per share	$0.79	$1.32	$2.22
Adjusted diluted earnings per share	$1.49	$2.17	$2.92

(1) Applies a blended federal, state, and foreign tax rate of 23% applicable to the non-GAAP adjustments.

Adjusted net income and diluted EPS are defined as net income as reported, adjusted for certain items, including amortization of intangible assets and unusual non-recurring items. Adjusted net income and diluted EPS are not a measure determined in accordance with GAAP in the United States, and may not be comparable to the measure as used by other companies. Nevertheless, the Company believes that providing non-GAAP information, such as adjusted net income and diluted EPS are important for investors and other readers of the Company's financial statements and assists in understanding the comparison of the current quarter's and current year's net income and diluted EPS to the historical periods' net income and diluted EPS.

NOTE: Components may not add up to totals due to rounding

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ADJUSTED EBITDA RECONCILIATION

($ in thousands)

	For the three months ended				
	Sept 30, 2025	Dec 31, 2025	Mar 31, 2026	June 30, 2026	Sept 30, 2026
Net income	$ 6,477	$ 6,383	$ 5,357	$ 10,391	$ 15,325
Interest expense	3,401	2,587	2,553	2,523	2,494
Provision for income taxes	1,845	2,267	1,426	2,628	4,371
Depreciation and amortization	6,423	6,302	6,210	6,191	6,094
EBITDA	**18,146**	**17,539**	**15,546**	**21,733**	**28,284**
Stock compensation expense	835	840	848	998	983
Acquisition and integration-related costs	17	7	-	-	-
Restructuring and business realignment costs	836	536	862	641	15
Foreign currency loss	465	105	20	343	370
Adjusted EBITDA	**$ 20,299**	**$ 19,027**	**$ 17,276**	**$ 23,715**	**$ 29,652**
Revenue	**$ 138,743**	**$ 143,354**	**$ 138,915**	**$ 153,770**	**$ 164,399**
Adjusted EBITDA Margin	**14.6%**	**13.3%**	**12.4%**	**15.4%**	**18.0%**

In addition to reporting revenue and net income, which are U.S. generally accepted accounting principle ("GAAP") measures, the Company presents EBITDA and Adjusted EBITDA (earnings before interest, income taxes, depreciation and amortization, stock-based compensation expense, acquisition and integration-related costs, restructuring and business realignment costs, and foreign currency gains/losses), which are non-GAAP measures. The Company believes EBITDA and Adjusted EBITDA are often a useful measure of a Company's operating performance and are a significant basis used by the Company's management to evaluate and compare the core operating performance of its business from period to period by removing the impact of the capital structure (interest), tangible and intangible asset base (depreciation and amortization), taxes, stock-based compensation expense, acquisition and integration-related costs, restructuring and business realignment costs, foreign currency gains/losses on short-term assets and liabilities, and other items that are not indicative of the Company's core operating performance. EBITDA and Adjusted EBITDA do not represent and should not be considered as an alternative to net income, operating income, net cash provided by operating activities or any other measure for determining operating performance or liquidity that is calculated in accordance with GAAP.

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ADJUSTED EBITDA RECONCILIATION

($ in thousands, except per share data)

	For twelve months ended		
	Dec 31, 2024	Dec 31, 2025	Sept 30, 2026
Net income	$ 13,166	$ 22,034	$ 37,457
Interest expense	13,296	13,175	10,157
Provision for income taxes	3,692	6,700	10,692
Depreciation and amortization	25,891	25,407	24,797
EBITDA	**$ 56,045**	**$ 67,316**	**$ 83,103**
Stock-based compensation expense	4,147	3,430	3,668
Acquisition and integration-related costs	445	47	12
Restructuring and business realignment costs	1,971	3,993	2,049
Foreign currency loss	(83)	2,079	837
Adjusted EBITDA	**$ 62,525**	**$ 76,865**	**$ 89,669**
Revenue	**$ 529,968**	**$ 554,478**	**$ 600,438**
Adjusted EBITDA Margin	**11.8%**	**13.9%**	**14.9%**

In addition to reporting revenue and net income, which are U.S. generally accepted accounting principle ("GAAP") measures, the Company presents EBITDA and Adjusted EBITDA (earnings before interest, income taxes, depreciation and amortization, stock-based compensation expense, acquisition and integration-related costs, restructuring and business realignment costs, and foreign currency gains/losses), which are non-GAAP measures. The Company believes EBITDA and Adjusted EBITDA are often a useful measure of a Company's operating performance and are a significant basis used by the Company's management to evaluate and compare the core operating performance of its business from period to period by removing the impact of the capital structure (interest), tangible and intangible asset base (depreciation and amortization), taxes, stock-based compensation expense, acquisition and integration-related costs, restructuring and business realignment costs, foreign currency gains/losses on short-term assets and liabilities, and other items that are not indicative of the Company's core operating performance. EBITDA and Adjusted EBITDA do not represent and should not be considered as an alternative to net income, operating income, net cash provided by operating activities or any other measure for determining operating performance or liquidity that is calculated in accordance with GAAP.

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REVENUE EXCLUDING FOREIGN CURRENCY EXCHANGE AND CALCULATION OF ORGANIC REVENUE

($ in thousands)

	Three months ended September 30, 2026	Nine months ended September 30, 2026
Revenue as reported	$ 164,339	$ 457,084
Foreign currency impact - (favorable) / unfavorable	850	(5,491)
Revenue excluding foreign currency exchange impacts	$ 165,249	$ 451,593

	Three months ended September 30, 2026	Nine months ended September 30, 2026
Revenue change over prior year	18.5 %	11.2 %
Less: Impact of acquisitions and foreign currency	0.6	(1.4)
Organic growth	19.1 %	9.8 %

In addition to reporting revenue and net income, which are U.S. generally accepted accounting principle (“GAAP”) measures, the Company presents Revenue excluding foreign currency exchange rate impacts, Organic revenue, EBITDA and Adjusted EBITDA (earnings before interest, income taxes, depreciation and amortization, stock-based compensation expense, acquisition and integration-related costs, restructuring and business realignment costs, and foreign currency gains/losses), total net debt, and leverage ratio, which are non-GAAP measures. The Company believes that Revenue excluding foreign currency exchange rate impacts is a useful measure in analyzing organic sales results. The Company excludes the effect of currency translation from revenue for this measure because currency translation is not fully under management’s control, is subject to volatility and can obscure underlying business trends. The portion of revenue attributable to currency translation is calculated as the difference between the current period revenue and the current period revenue after applying foreign exchange rates from the prior period. Organic revenue is reported revenues adjusted for the impact of foreign currency and the revenue contribution from acquisitions.

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TOTAL NET DEBT AND LEVERAGE RATIO RECONCILIATION

($ in thousands)

	September 30, 2026	December 31, 2025
Total debt	$ 173,372	$ 180,389
Less: cash and cash equivalents	$ 39,646	$ 40,705
Total net debt (Non-GAAP)	$ 133,726	$ 139,684
Adjusted EBITDA (Non-GAAP)	$ 89,669	$ 76,865
Leverage Ratio (Non-GAAP)	1.49	1.82

We believe that total net debt and leverage ratio provide meaningful measures of liquidity and a useful basis for assessing our ability to fund our activities, including the financing of acquisitions and debt repayments. Total net debt is calculated as total debt less cash and cash equivalents. Leverage ratio is total net debt divided by adjusted EBITDA for the trailing twelve months.

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November 5, 2026

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