

# Bridgepoint Group plc (excluding KARE)

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Company compiled consensus - average, high, low estimates

Last updated 30 September 2026

| Consensus                            | FY 2026     |             |             | FY 2027     |             |             | FY 2028     |             |             |
|--------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| £'m (unless stated otherwise)        | Average     | High        | Low         | Average     | High        | Low         | Average     | High        | Low         |
| <b>AUM</b>                           |             |             |             |             |             |             |             |             |             |
| Total AUM (€ billion)                | 89          | 97          | 84          | 92          | 95          | 89          | 101         | 106         | 92          |
| FPAUM (€ billion)                    | 50          | 55          | 45          | 53          | 54          | 51          | 57          | 62          | 51          |
| <b>P&amp;L</b>                       |             |             |             |             |             |             |             |             |             |
| Management fees and other income     | 520         | 536         | 481         | 558         | 581         | 533         | 583         | 635         | 545         |
| Expenses before exceptional expenses | (299)       | (292)       | (307)       | (319)       | (308)       | (323)       | (334)       | (314)       | (348)       |
| <b>Underlying FRE</b>                | <b>221</b>  | <b>236</b>  | <b>182</b>  | <b>239</b>  | <b>263</b>  | <b>210</b>  | <b>248</b>  | <b>313</b>  | <b>211</b>  |
| <i>Underlying FRE margin</i>         | <i>42%</i>  | <i>44%</i>  | <i>38%</i>  | <i>43%</i>  | <i>46%</i>  | <i>39%</i>  | <i>42%</i>  | <i>49%</i>  | <i>38%</i>  |
| PRE                                  | 178         | 191         | 158         | 180         | 196         | 143         | 185         | 201         | 161         |
| <b>Underlying EBITDA</b>             | <b>400</b>  | <b>424</b>  | <b>340</b>  | <b>419</b>  | <b>437</b>  | <b>403</b>  | <b>434</b>  | <b>502</b>  | <b>373</b>  |
| <i>Underlying EBITDA margin</i>      | <i>57%</i>  | <i>59%</i>  | <i>53%</i>  | <i>57%</i>  | <i>59%</i>  | <i>56%</i>  | <i>56%</i>  | <i>61%</i>  | <i>52%</i>  |
| <b>Underlying PBT</b>                | <b>339</b>  | <b>370</b>  | <b>285</b>  | <b>344</b>  | <b>395</b>  | <b>308</b>  | <b>369</b>  | <b>460</b>  | <b>301</b>  |
| Income tax                           | (51)        | (39)        | (61)        | (65)        | (52)        | (80)        | (71)        | (44)        | (94)        |
| <b>Underlying PAT</b>                | <b>288</b>  | <b>316</b>  | <b>242</b>  | <b>279</b>  | <b>338</b>  | <b>234</b>  | <b>299</b>  | <b>393</b>  | <b>234</b>  |
| No. of shares                        | 1,038       | 1,044       | 1,034       | 1,173       | 1,331       | 1,036       | 1,213       | 1,331       | 1,081       |
| <b>Underlying EPS (pence)</b>        | <b>27.8</b> | <b>30.4</b> | <b>23.2</b> | <b>24.1</b> | <b>32.0</b> | <b>20.3</b> | <b>25.1</b> | <b>35.1</b> | <b>18.9</b> |

## Notes

1. Columns represent the average, highest and lowest analyst estimates for each line item and are not additive. Therefore, total values may not tie to the sum of components

# Disclaimer



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The following analysts have published a forecast for Bridgepoint since the announcement of the KARE transaction on 29 June 2026 and have been included in this Company compiled consensus:

Analyst coverage included in consensus, by year

| Analyst         | FY 2026 | FY 2027 | FY 2028 |
|-----------------|---------|---------|---------|
| Berenberg       | ✓       | –       | –       |
| BNP Paribas*    | ✓       | ✓       | ✓       |
| Cavendish       | ✓       | ✓       | ✓       |
| Citi            | ✓       | ✓       | ✓       |
| Deutsche Numis  | ✓       | ✓       | ✓       |
| Investec        | ✓       | –       | –       |
| Jefferies       | ✓       | ✓       | ✓       |
| Morgan Stanley* | ✓       | ✓       | ✓       |

\*Corporate Brokers to Bridgepoint Group plc

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