

# A MAGNIFICENT MATERIAL

STABLE. FLEXIBLE. INNOVATIVE. SUSTAINABLE.

Presentation Q1/2024  
April 24, 2024

## Note

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# HIGHLIGHTS

## CHALLENGING ENVIRONMENT INFLUENCES QUARTERLY RESULT

- › Quarterly performance influenced by lower aluminium price and lower shipment volumes due to partly subdued incoming orders in Q4/2023
- › Revenue of EUR 335.8 million below the previous year's level due to price and volume factors (Q1/2023: EUR 404.8 million)
- › EBITDA of EUR 42.4 million above Q4/2023, but lower than in previous year's quarter (Q1/2023: EUR 60.8 million)
- › Net income after taxes at EUR 13.3 million (Q1/2023: EUR 26.8 million)
- › Cash flow from operating activities at the previous year's level of EUR 35.6 million (Q1/2023: EUR 35.6 million)
- › Outlook for 2024: From today's perspective and assuming no significant global deterioration in the economic situation, full-year EBITDA is expected to be between EUR 150 million and EUR 180 million

# MARKET AND SHIPMENTS

# SENTIMENT INDICATOR

## PURCHASING MANAGERS' INDEX\* IN EUROZONE BELOW GROWTH THRESHOLD

Region/Country	2022												2023												2024		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
World	53	54	53	52	52	52	51	50	50	49	49	49	49	50	50	50	50	49	49	49	49	49	49	49	50	50	51
Euro Zone	59	58	57	56	55	52	50	50	48	46	47	48	49	49	47	46	45	43	43	44	43	43	44	44	47	47	46
Austria	62	58	59	58	57	51	52	49	49	47	47	47	48	47	45	42	40	39	39	41	40	42	42	42	43	43	42
Germany	60	58	57	55	55	52	49	49	48	45	46	47	47	46	45	45	43	41	39	39	40	41	43	43	46	43	42
France	56	57	55	56	55	51	50	51	48	47	48	49	51	47	47	46	46	46	45	46	44	43	43	42	43	47	46
Italy	58	58	56	55	52	51	49	48	48	47	48	49	50	52	51	47	46	44	45	45	47	45	44	45	49	49	50
Spain	56	57	54	53	54	53	49	50	49	45	46	46	48	51	51	49	48	48	48	47	48	45	46	46	49	52	51
UK	57	58	55	56	55	53	52	47	48	46	47	45	47	49	48	48	47	47	45	43	44	45	47	46	47	48	50
USA	56	57	59	59	57	53	52	52	52	50	48	46	47	47	49	50	48	46	49	48	50	50	49	48	51	52	52
Canada	56	57	59	56	57	55	53	49	50	49	50	49	51	52	49	50	49	49	50	48	48	49	48	45	48	50	50
China	49	50	48	46	48	52	50	50	48	49	49	49	49	52	50	50	51	51	49	51	51	50	51	51	51	51	51
Japan	55	53	54	54	53	53	52	52	51	51	49	49	49	48	49	50	51	50	50	50	49	49	48	48	48	47	48

- > Gloomy sentiment in Eurozone remained largely unchanged in Q1/2024; economic growth of +0.7% expected for the Eurozone in 2024\*\*
- > GDP forecasts for Germany and Austria significantly weaker at +0.2% each for 2024\*\*

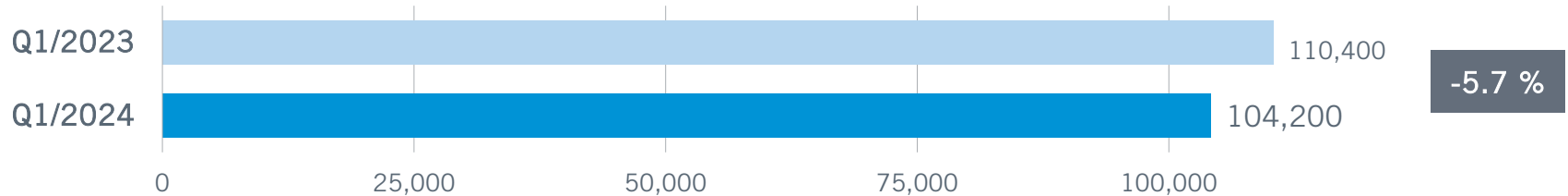
\*The purchasing managers' index for the manufacturing sector is shown. Source: Bloomberg

\*\*WIFO Economic Forecast 1/2024, March 2024

# AMAG GROUP SHIPMENTS

SHIPMENTS BELOW PREVIOUS YEAR DUE TO GLOOMY MARKET ENVIRONMENT

## Shipments in tonnes



## Change in shipment volume compared to Q1/2023 in tonnes



**Metal:** +400 tonnes → Unchanged stable production at the Alouette smelter in Canada



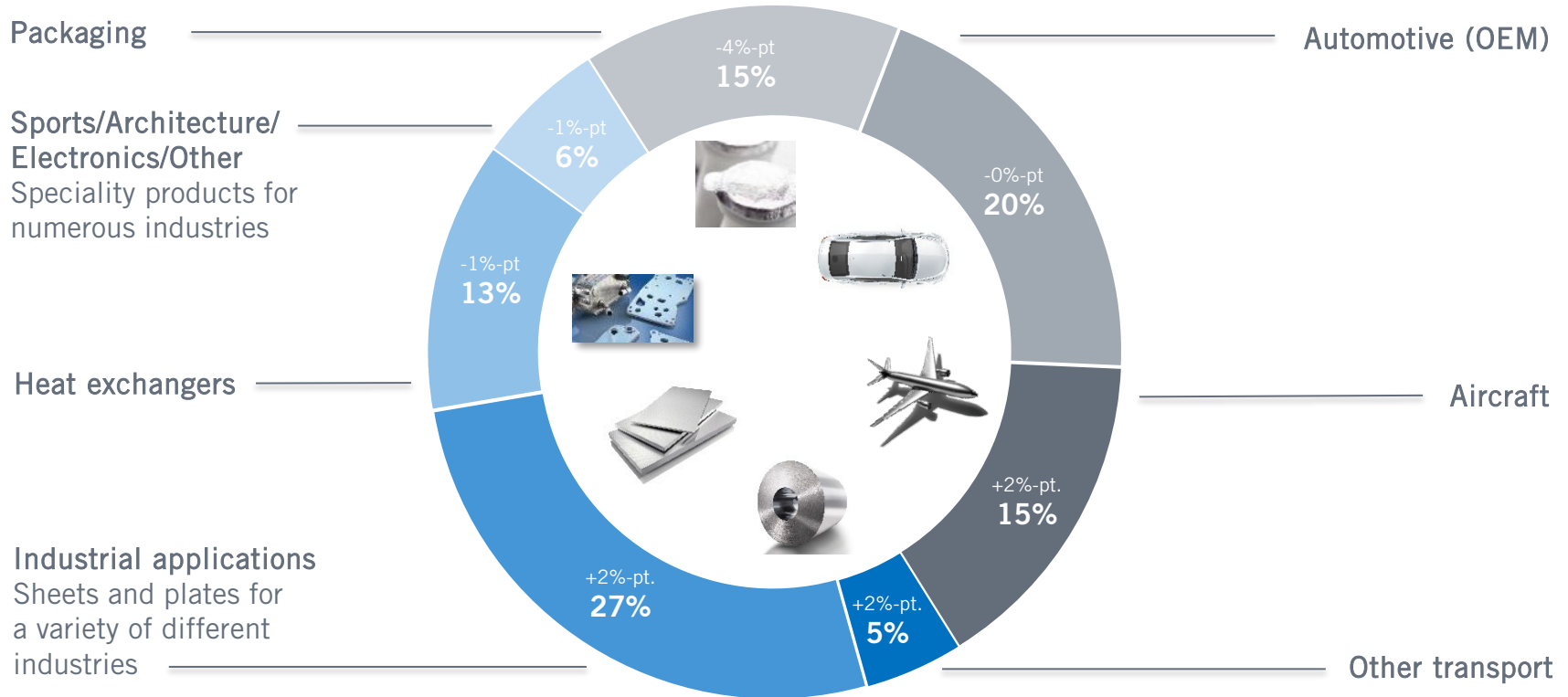
**Casting:** -1,900 tonnes → Shipments of recycling foundry alloys solid, but below previous year's level



**Rolling:** -4,700 tonnes → Subdued order intake in Q4/2023, particularly for industrial applications and in the sports sector, as well as lower shipments of packaging products; Demand from the transport industry continue to develop positively

# ROLLING DIVISION: SHIPMENTS BY INDUSTRY

PRODUCT MIX WITH UNCHANGED HIGH DIVERSIFICATION

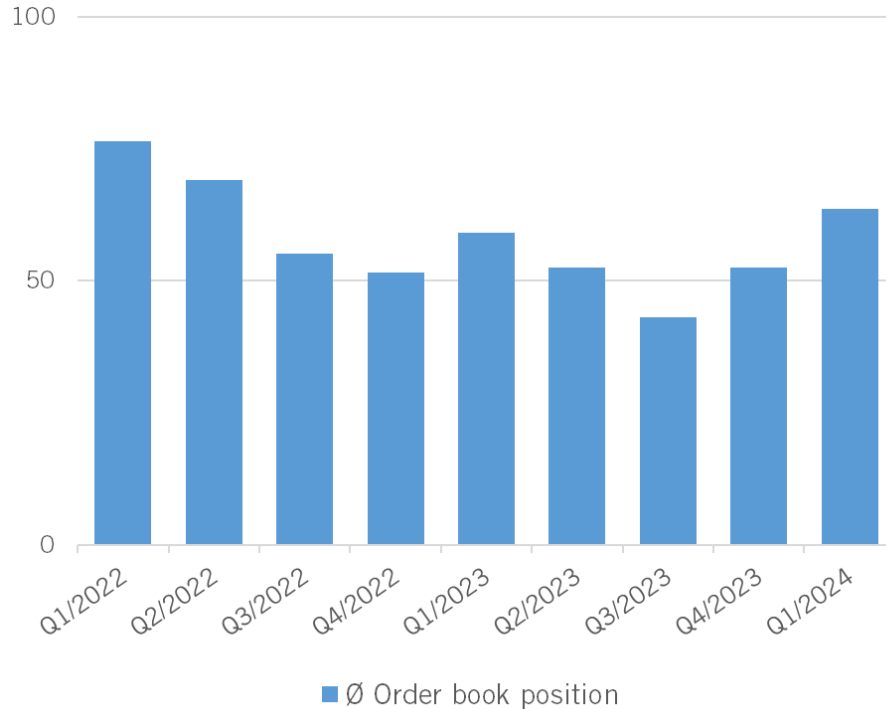


Percentages refer to shipments in the first quarter of 2024.  
The percentage change in percentage points represents the difference in the product mix share compared to Q1/2023.

# ROLLING DIVISION: ORDER TREND

ORDER BACKLOG AT A SOLID LEVEL OF OVER 60 THOUSAND TONNES

[in thousand tonnes]



- › Order intake in Q1/2024 largely as planned
- › Average order backlog in Q1/2024 with over 60 thousand tonnes in the AMAG target corridor
- › Order development for industrial applications in Europe remains subdued; slight improvement recognisable in USA
- › Ongoing destocking in the sports sector; positive trend in the transportation sector

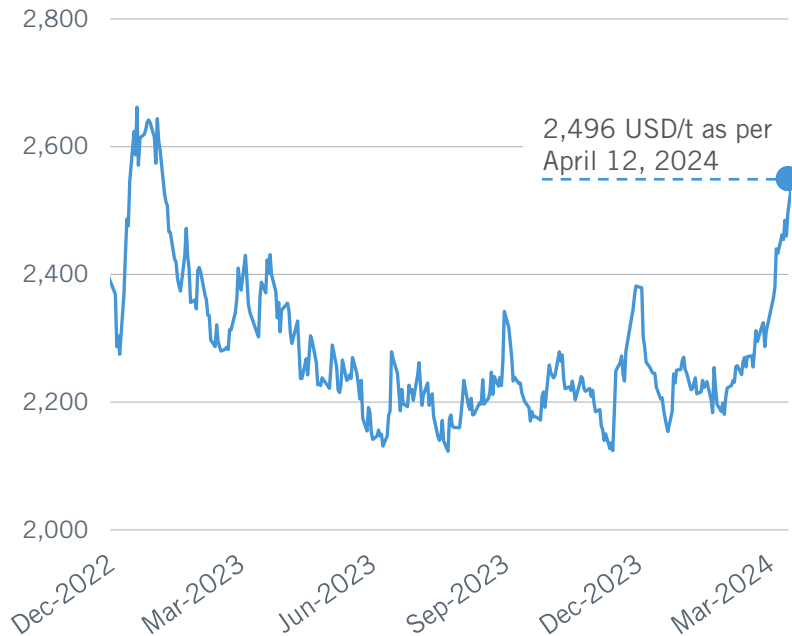


# Q1/2024 BUSINESS PERFORMANCE

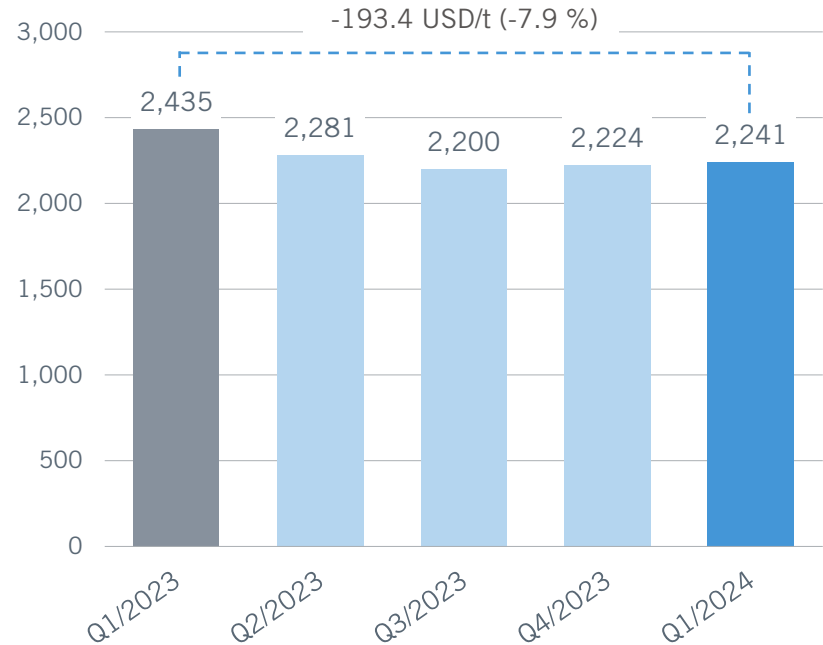
# ALUMINIUM PRICE TREND

LOWER QUARTER-ON-QUARTER, BUT NOTICEABLE INCREASE IN APRIL 2024

## Aluminium price trend in USD/t



## Ø Aluminium price (3-month LME) in USD/t



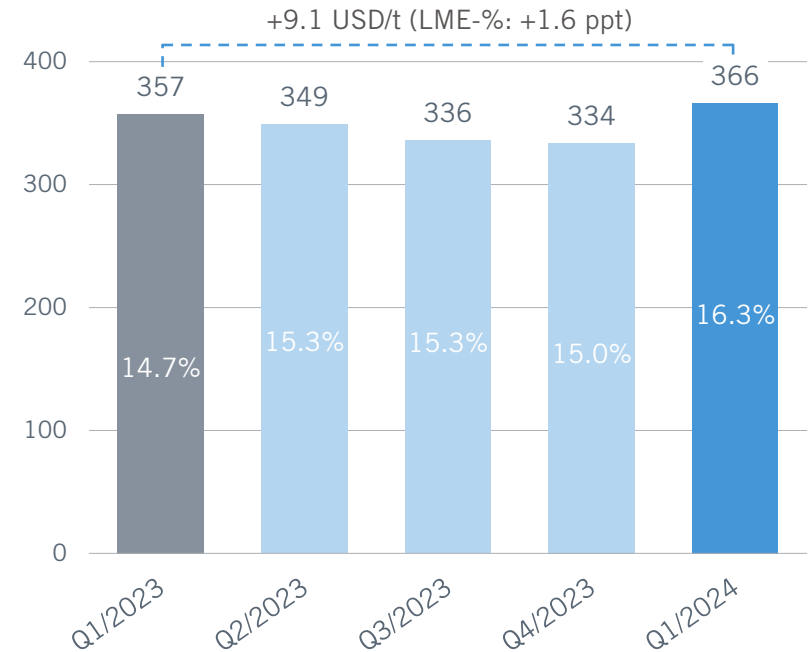
# ALUMINA PRICE TREND

ALUMINA PRICE SIGNIFICANTLY UP IN % OF ALUMINIUM PRICE

## Alumina price trend in USD/t



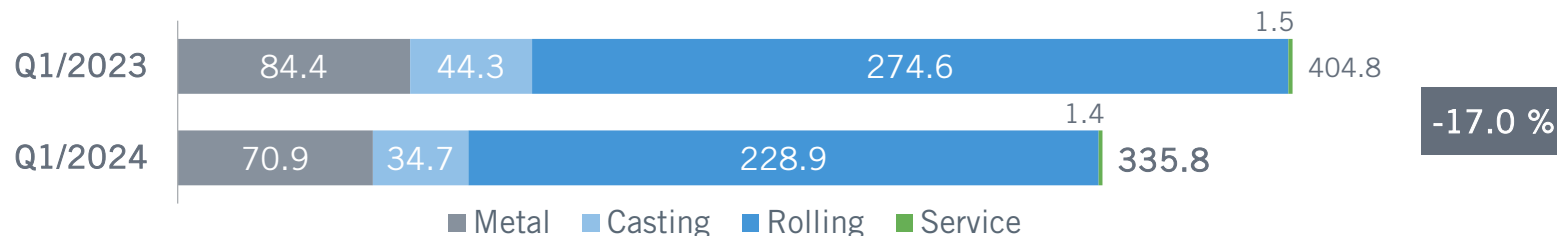
## Ø Alumina price in USD/t and in % of LME



# AMAG GROUP REVENUE

BELOW THE PREVIOUS YEAR'S LEVEL DUE TO PRICE AND VOLUME FACTORS

## Revenue in EUR million



## Revenue reconciliation compared to Q1/2023 in EUR million



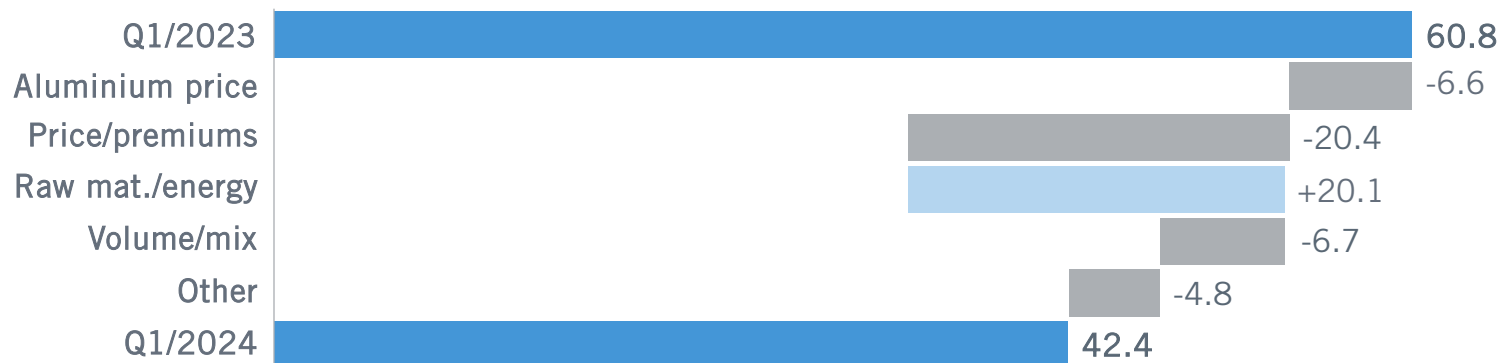
# AMAG GROUP EBITDA

EBITDA SIGNIFICANTLY EXCEEDS RESULT FROM Q4/2023

## EBITDA in EUR million



## EBITDA reconciliation compared to Q1/2023 in EUR million



# CHANGE IN EBITDA BY DIVISION

HIGH QUARTERLY RESULT IN PREVIOUS YEAR RELATIVISES DEVIATIONS

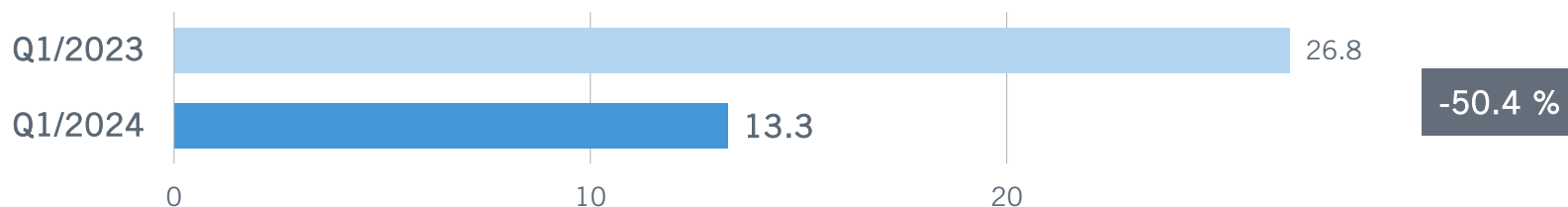
## Change in EBITDA compared to Q1/2023 in EUR million



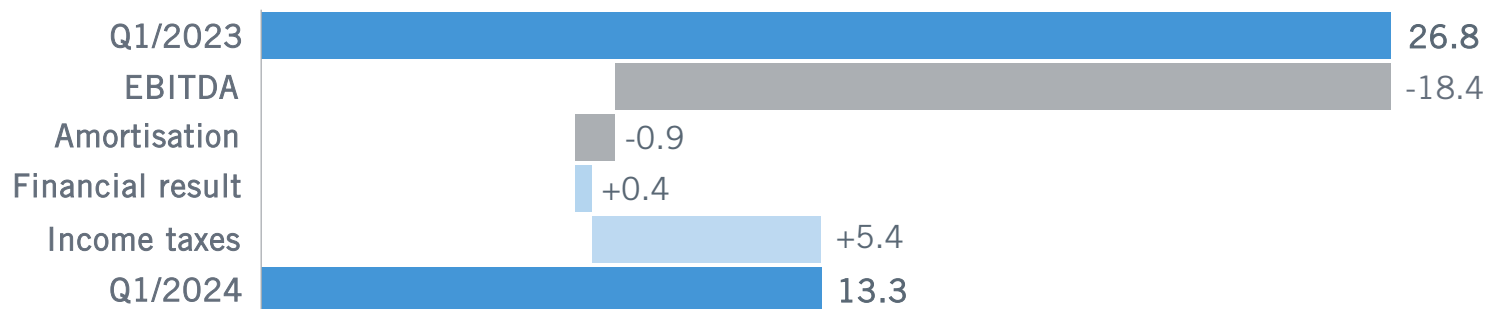
# AMAG GROUP NET INCOME AFTER TAXES

INFLUENCED BY LOWER OPERATING RESULT

## Net income after taxes in EUR million



## Net income after taxes reconciliation compared to Q1/2023 in EUR million



# KEY FINANCIAL FIGURES AT A GLANCE

<b>KEY FIGURES OF AMAG GROUP IN EUR MILLION</b>	<b>Q1/2024</b>	<b>Q1/2023</b>	<b>+/- in %</b>
Total shipments in tonnes	<b>104,200</b>	110,400	-5.7 %
Revenue	<b>335.8</b>	404.8	-17.0 %
EBITDA	<b>42.4</b>	60.8	-30.3 %
EBITDA margin	<b>12.6 %</b>	15.0 %	
Operating result (EBIT)	<b>20.2</b>	39.5	-49.0 %
EBIT margin	<b>6.0 %</b>	9.8 %	
Income after taxes	<b>13.3</b>	26.8	-50.4 %
Earnings per share in EUR	<b>0.38</b>	0.76	-50.4 %



# KEY ESG FIGURES AT A GLANCE

## KEY FIGURES FOR THE RANSHOFEN SITE

	Unit	Q1/2024	Q1/2023	Change
Ø Scrap utilisation rate	%	<b>78.4</b>	76.5	
Ø Speciality share	%	<b>58</b>	58	
Specific energy consumption	kWh/tonne	<b>1,220</b>	1,240	-1.6 %
Specific CO <sub>2</sub> emissions (Scope 1 & 2)	tonnes CO <sub>2</sub> /tonne	<b>0.170</b>	0.175	-2.9 %
TRIFR* accident rate	1)	<b>1.9</b>	1.4	+35.7 %
Proportion of women*	%	<b>16</b>	15	
Number of hours of training and further education*	h/employee	<b>6.4</b>	5.7	+12.3 %
Compliance violations*	Quantity	<b>0</b>	0	

The environmental key figures are influenced by the production volume and the product mix, among other things.

\*Key figures also include AMAG components

1) Total Recordable Injury Frequency Rate = accidents per head with absence and incidents with medical treatment in relation to total productive hours x 200,000 hours

# AMAG GROUP CASH FLOW

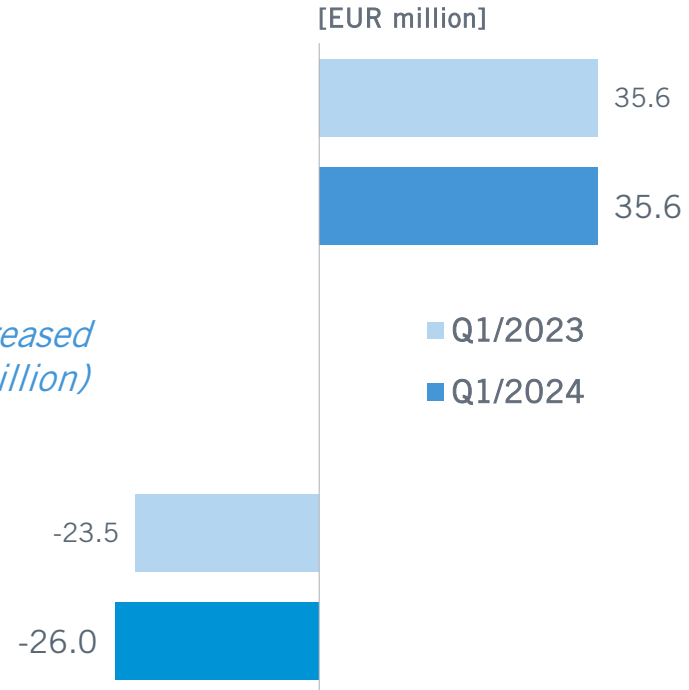
OPERATING CASH FLOW AT PREVIOUS YEAR'S LEVEL

## Cash flow from operating activities in Q1/2024

- › In particular, the operating result (EBITDA) of around EUR 42 million has a positive effect on cash flow development
- › *Previous year's cash flow negatively impacted by increased working capital despite higher EBITDA (EUR 60.8 million)*

## Cash flow from investing activities in Q1/2024

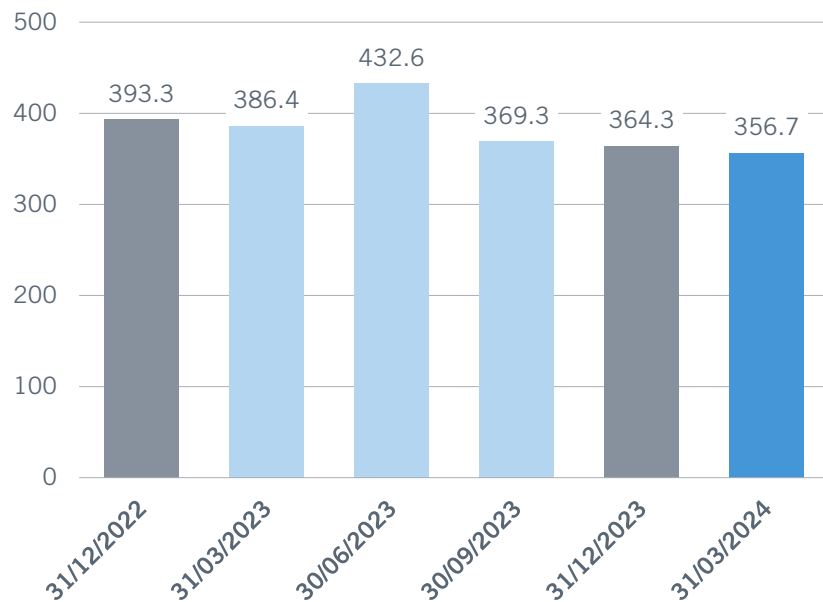
- › Investments were realised as planned



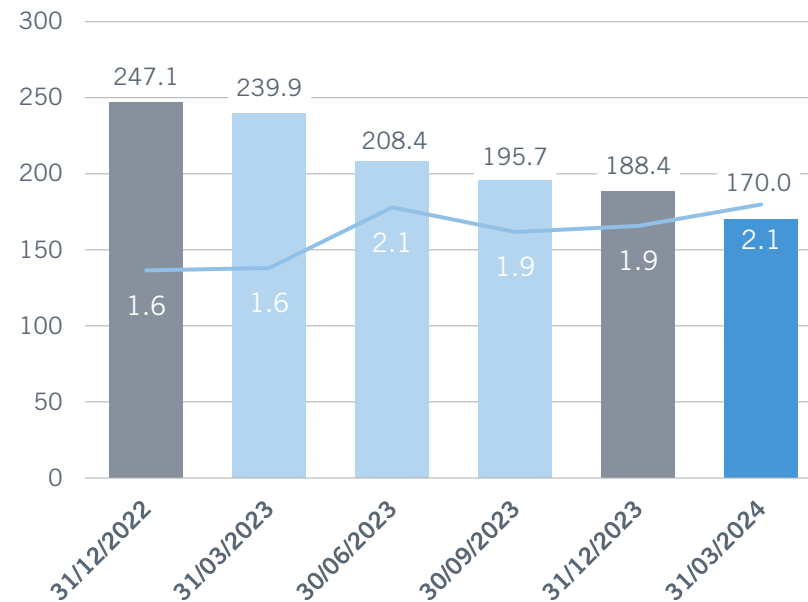
# AMAG GROUP BALANCE SHEET FIGURES (1/2)

KEY FIGURES REMAIN AT A STABLE LEVEL

## Net financial debt in EUR million



## EBITDA (LTM) in EUR million and Net debt/EBITDA\*

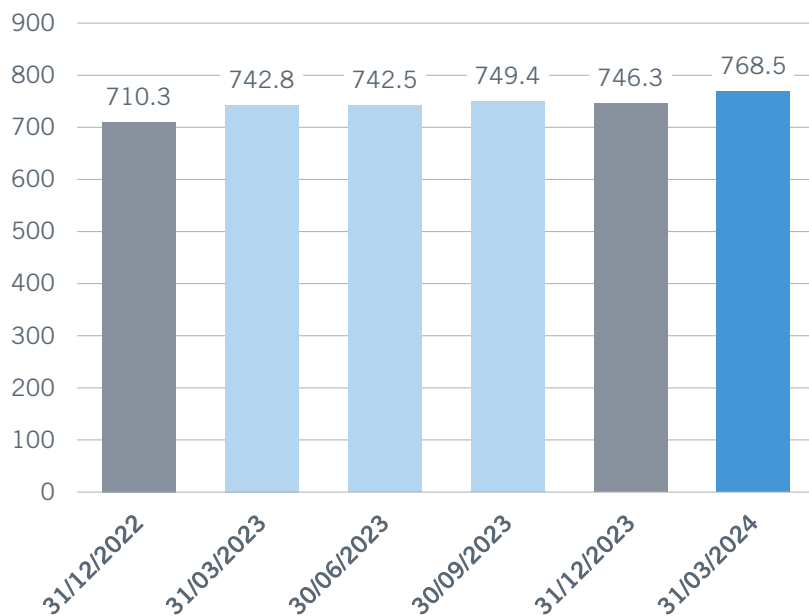


\*EBITDA for the last 12 months (Last Twelve Months) and net debt/EBITDA as at the respective reporting date are shown.

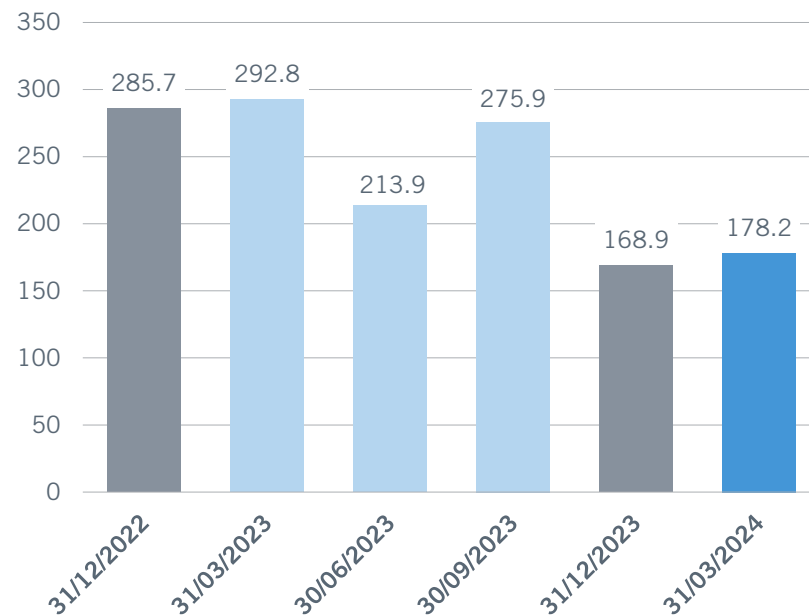
# AMAG GROUP BALANCE SHEET FIGURES (2/2)

KEY FIGURES AT A CONSISTENTLY STABLE LEVEL

## Equity in EUR million



## Cash and cash equivalents in EUR million

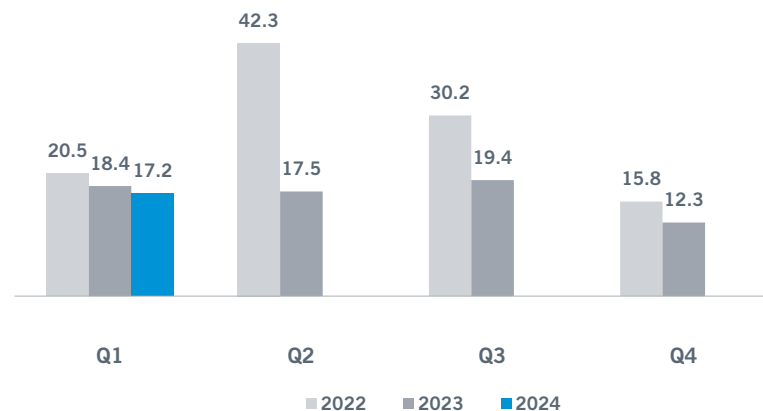


# METAL DIVISION

## EBITDA STILL WELL ABOVE THE LONG-TERM AVERAGE

IN EUR MILLION	Q1/2024	Q1/2023	+/- %
Total shipments in tonnes	31,500	31,100	1.3
External shipments in tonnes	31,500	31,100	1.3
Revenue	232.9	287.1	-18.9
External revenue	70.9	84.4	-16.0
EBITDA	17.2	18.4	-6.2
EBIT	10.2	11.8	-13.3
Ø Employees (FTE)	206	206	0.0

### EBITDA trend in EUR million



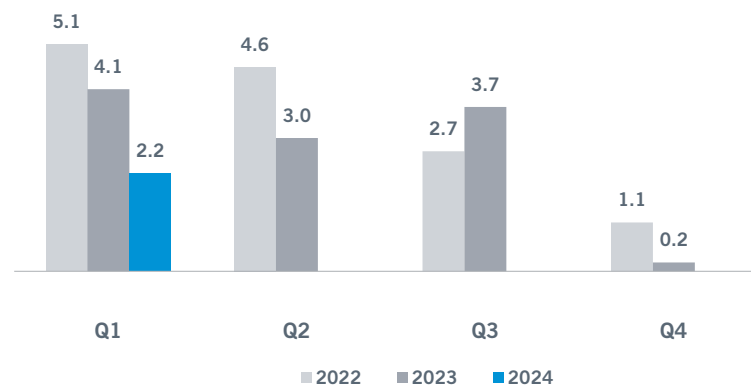
- › Unchanged stable production at the Alouette smelter in Canada
- › Decline in earnings is especially due to changes in market prices, particularly the price of aluminium and alumina

# CASTING DIVISION

## SOLID DEMAND FOR RECYCLED CAST ALLOYS

IN EUR MILLION	Q1/2024	Q1/2023	+/- %
Total shipments in tonnes	<b>23,300</b>	25,200	-7.5
External shipments in tonnes	<b>15,300</b>	17,600	-13.1
Revenue	<b>38.2</b>	47.8	-20.0
External revenue	<b>34.7</b>	44.3	-21.6
EBITDA	<b>2.2</b>	4.1	-46.5
EBIT	<b>1.6</b>	3.5	-53.5
Ø Employees (FTE)	<b>122</b>	123	-0.7

### EBITDA trend in EUR million



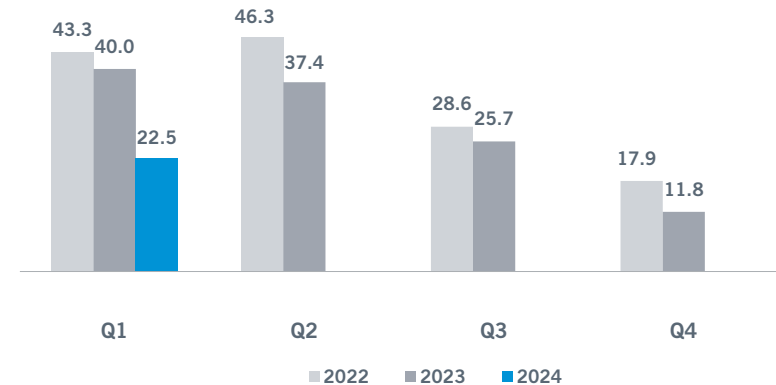
- › Stable demand for recycled cast alloys; particularly high shipment volumes in the first quarter of the previous year relativises decline in Q1/2024
- › Solid EBITDA below the previous year's level due to higher price pressure combined with increased costs

# ROLLING DIVISION

## RESULT INFLUENCED BY WEAK EUROPEAN ECONOMY

IN EUR MILLION	Q1/2024	Q1/2023	+/- %
Total shipments in tonnes	<b>49,400</b>	54,100	-8.7
External shipments in tonnes	<b>48,700</b>	54,100	-10.0
Revenue	<b>270.5</b>	325.4	-16.9
External revenue	<b>228.9</b>	274.6	-16.6
EBITDA	<b>22.5</b>	40.0	-43.7
EBIT	<b>9.4</b>	27.4	-65.5
Ø Employees (FTE)	<b>1,698</b>	1,689	0.6

### EBITDA trend in EUR million



- › Shipment volume lower in Q1/2024 due to the subdued order intake from certain industries in the previous year (especially Q4/2023); order situation improved as expected in Q1/2024
- › Deviation in earnings also reflects evaluation effects of around EUR +9 million in the first quarter of the previous year, mainly due to energy prices

# OUTLOOK 2024



- › Demand for aluminium rolled products improved compared to Q4/2023, although certain industries continue to be affected by the gloomy market environment
- › Overall, the current order intake in the Casting and Rolling divisions is at the expected level
- › Current CRU forecasts\* confirm a positive cross-sector demand trend with high growth potential in the transport sector in the medium to long term
- › Further business performance will mainly depend on economic and aluminium price trends; GDP forecasts\*\* for Germany/Austria at a modest +0.2% for 2024
- › AMAG continues to pursue its speciality strategy, will respond flexibly to market changes as usual and is therefore cautiously optimistic about the remainder of 2024
- › Outlook for 2024: From today's perspective and assuming no significant global deterioration in the economic situation, full-year EBITDA is expected to be between EUR 150 million and EUR 180 million

\*Sources: Commodity Research Unit, Aluminium Market Outlook, January 2024 & Aluminium Rolled Products Market Outlook, February 2024

\*\*Source: WIFO Economic Forecast 1/2024, March 2024

# APPENDIX

# BALANCE SHEET

in EUR million	March 31, 2024	December 31, 2023	+/- (%)
Intangible assets and goodwill	18.4	17.9	3.0
Property, plant and equipment	726.1	723.3	0.4
Equity accounted investments	1.6	1.5	2.7
Other non-current assets and financial assets	20.5	22.1	-7.4
Deferred tax assets	7.2	9.4	-23.1
<b>Non-current assets</b>	<b>773.7</b>	<b>774.2</b>	<b>-0.1</b>
Inventories	435.7	433.1	0.6
Trade receivables	171.9	153.9	11.7
Current tax assets	2.5	1.7	45.8
Other current assets	72.7	86.0	-15.4
Contract assets	1.8	2.4	-25.9
Cash and cash equivalents	178.2	168.9	5.5
<b>Current assets</b>	<b>862.9</b>	<b>846.0</b>	<b>2.0</b>
<b>TOTAL ASSETS</b>	<b>1,636.6</b>	<b>1,620.2</b>	<b>1.0</b>
<b>Equity</b>	<b>768.5</b>	<b>746.3</b>	<b>3.0</b>
Non-current provisions	77.5	81.0	-4.4
Interest-bearing non-current financial liabilities	456.2	454.7	0.3
Other non-current liabilities and grants	39.7	44.5	-10.7
Deferred tax liabilities	7.9	8.1	-2.3
<b>Non-current liabilities</b>	<b>581.3</b>	<b>588.3</b>	<b>-1.2</b>
Current provisions	16.8	17.9	-5.9
Interest-bearing current financial liabilities	78.8	78.7	0.2
Trade payables	97.2	93.1	4.4
Current tax liabilities	0.1	0.1	18.3
Other current liabilities and grants	93.9	95.8	-2.0
<b>Current liabilities</b>	<b>286.8</b>	<b>285.6</b>	<b>0.4</b>
<b>TOTAL EQUITY AND LIABILITIES</b>	<b>1,636.6</b>	<b>1,620.2</b>	<b>1.0</b>

# STATEMENT OF PROFIT AND LOSS

ACCORDING TO THE COST OF SALES METHOD

in EUR million	Q1/2024	Q1/2023	+/- (%)	Q1/2024
Revenue	335.8	404.8	-17.0	335.8
Cost of sales	-279.0	-328.1	14.9	-279.0
<b>Gross profit</b>	<b>56.8</b>	<b>76.7</b>	<b>-26.0</b>	<b>56.8</b>
Other income	2.8	3.1	-10.2	2.8
Selling and distribution expenses	-19.2	-21.2	9.5	-19.2
Administrative expenses	-10.3	-10.7	3.0	-10.3
Research and development expenses	-6.2	-5.1	-21.5	-6.2
Other expenses	-3.8	-3.4	-11.5	-3.8
Share of profit of equity-accounted investments	0.0	0.0	>1000	0.0
<b>Earnings before interest and taxes (EBIT)</b>	<b>20.2</b>	<b>39.5</b>	<b>-49.0</b>	<b>20.2</b>
Net interest result	-3.0	-3.1	2.6	-3.0
Other financial result	0.6	0.2	126.2	0.6
<b>Net financial income (expenses)</b>	<b>-2.4</b>	<b>-2.8</b>	<b>13.9</b>	<b>-2.4</b>
<b>Earnings before taxes (EBT)</b>	<b>17.7</b>	<b>36.7</b>	<b>-51.7</b>	<b>17.7</b>
Current taxes	-4.4	-10.8	59.1	-4.4
Deferred taxes	0.0	1.0	-99.1	0.0
<b>Income taxes</b>	<b>-4.4</b>	<b>-9.8</b>	<b>55.2</b>	<b>-4.4</b>
<b>Net income after taxes</b>	<b>13.3</b>	<b>26.8</b>	<b>-50.4</b>	<b>13.3</b>

# STATEMENT OF CASH FLOWS

in EUR million	Q1/2024	Q1/2023
Earnings before taxes (EBT)	17.7	36.7
Net interest result	3.0	3.1
Share of profit of associates	0.0	0.0
Depreciation, amortisation and impairment losses/reversal of impairment losses on non-current assets	22.2	21.3
Impairment losses / reversal of impairment losses on financial assets	-0.1	-0.2
Losses/gains from the disposal of non-current assets	-0.1	-0.1
Proceeds from dividends	0.0	0.0
Other non-cash expenses/income	-0.5	0.0
Changes in inventories	-1.4	13.7
Changes in trade receivables	-18.1	-30.1
Changes in trade payables	7.1	0.8
Changes in provisions	-2.5	-7.6
Changes in derivatives	2.3	-1.3
Changes in contract assets	0.6	0.7
Changes in other receivables and liabilities	8.6	3.8
Tax payments	-4.0	-5.4
Interest received	2.1	1.8
Interest paid	-1.5	-1.5
<b>Cash flow from operating activities</b>	<b>35.6</b>	<b>35.6</b>
Proceeds from disposals of non-current assets	0.2	0.1
Payments for investments in property, plant and equipment and intangible assets	-26.3	-24.2
Proceeds from grants for investments	0.1	0.5
<b>Cash flow from investing activities</b>	<b>-26.0</b>	<b>-23.5</b>
Repayments of borrowings	-2.6	-3.9
Proceeds from borrowings	0.5	1.0
Dividends paid	0.0	0.0
<b>Cash flow from financing activities</b>	<b>-2.1</b>	<b>-2.9</b>
<b>Change in cash and cash equivalents</b>	<b>7.5</b>	<b>9.1</b>
Cash and cash equivalents at the beginning of the period	168.9	285.7
Effect of exchange rate changes on cash and cash equivalents	1.8	-2.0
<b>Cash and cash equivalents at the end of the period</b>	<b>178.2</b>	<b>292.8</b>

# STATEMENT OF COMPREHENSIVE INCOME

in EUR million	Q1/2024	Q1/2023
<b>Net income after taxes</b>	<b>13.3</b>	<b>26.8</b>
<b>Items that are or may be reclassified to profit or loss:</b>		
Currency translation differences	4.1	-3.9
Changes in the hedging reserve		
Recognized (expenses) and income during the financial year	2.7	6.3
Reclassifications of amounts that have been recognized in the statement of profit or loss	1.2	7.2
Deferred taxes relating thereto	-1.3	-3.5
Currency translation differences	-0.6	1.0
Changes in fair value reserve	0.3	0.4
Deferred taxes relating thereto	-0.1	-0.1
<b>Items that will never be reclassified to profit or loss:</b>		
Changes in revaluation reserve	0.0	0.0
Deferred taxes relating thereto	0.0	0.0
Remeasurement of defined benefit plans	3.2	-2.2
Deferred taxes relating thereto	-0.8	0.6
Currency translation differences	0.1	-0.1
Share of other comprehensive income of associates	0.0	0.0
Deferred taxes relating thereto	0.0	0.0
<b>Other comprehensive income for the year net of tax</b>	<b>8.9</b>	<b>5.7</b>
<b>Total comprehensive income for the year</b>	<b>22.2</b>	<b>32.5</b>

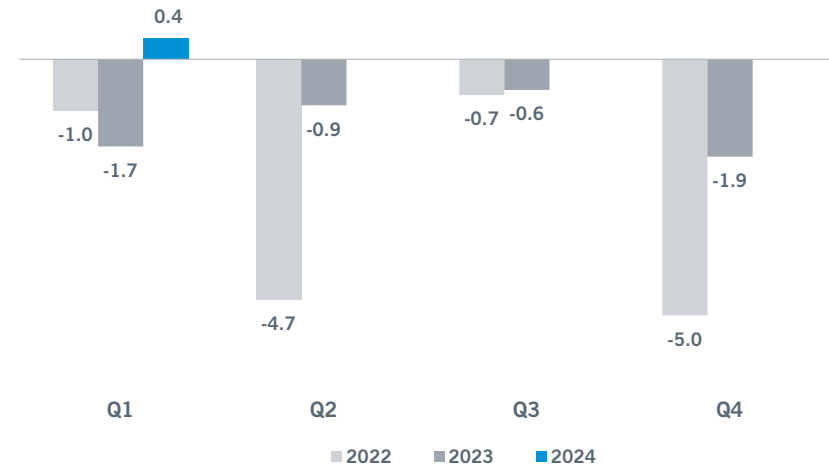
# STATEMENT OF CHANGES IN EQUITY

in EUR million	Share capital	Capital reserves	Hedging reserve	Fair value reserve	Revaluation reserve	Revaluation of defined benefit plans	Share of comprehensive income of associates	Exchange differences	Retained earnings	Equity attributable to owners of the company	Non-controlling interests	Equity
Balance as of December 31, 2022	35.3	377.7	-63.4	-0.9	1.0	-5.5	0.0	55.8	310.4	710.3	0.0	710.3
Net income after taxes									26.8	26.8	0.0	26.8
Other comprehensive income for the year net of tax			11.0	0.3	0.0	-1.7		-3.9		5.7		5.7
<b>Total comprehensive income for the year</b>			<b>11.0</b>	<b>0.3</b>	<b>0.0</b>	<b>-1.7</b>	<b>0.0</b>	<b>-3.9</b>	<b>26.8</b>	<b>32.5</b>	<b>0.0</b>	<b>32.5</b>
Dividend distributions									0.0	0.0		0.0
<b>Balance as of March 31, 2023</b>	<b>35.3</b>	<b>377.7</b>	<b>-52.4</b>	<b>-0.5</b>	<b>1.0</b>	<b>-7.2</b>	<b>0.0</b>	<b>51.9</b>	<b>337.2</b>	<b>742.8</b>	<b>0.0</b>	<b>742.8</b>
Balance as of December 31, 2023	35.3	377.7	-28.5	-0.3	1.0	-11.9	0.0	49.2	323.9	746.3	0.0	746.3
Net income after taxes									13.3	13.3	0.0	13.3
Other comprehensive income for the year net of tax			2.1	0.2	0.0	2.5		4.1	0.0	8.9		8.9
<b>Total comprehensive income for the year</b>			<b>2.1</b>	<b>0.2</b>	<b>0.0</b>	<b>2.5</b>	<b>0.0</b>	<b>4.1</b>	<b>13.3</b>	<b>22.2</b>	<b>0.0</b>	<b>22.2</b>
Dividend distributions									0.0	0.0		0.0
<b>Balance as of March 31, 2024</b>	<b>35.3</b>	<b>377.7</b>	<b>-26.4</b>	<b>-0.1</b>	<b>1.0</b>	<b>-9.4</b>	<b>0.0</b>	<b>53.3</b>	<b>337.2</b>	<b>768.5</b>	<b>0.0</b>	<b>768.5</b>

# SERVICE DIVISION

IN EUR MILLION	Q1/2024	Q1/2023	+/- %
Revenue	27.9	33.5	-16.6
External revenue	1.4	1.5	-9.8
EBITDA	0.4	-1.7	+123.0
EBIT	-1.1	-3.2	+63.7
Employees (FTE)	214	202	+5.9

## EBITDA trend in EUR million





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- › The [current issue](#) of "AluReport 1/2024" showcases the newly constructed [coil finishing line](#) and, in addition to numerous other topics, contains an interesting [interview with CEO/COO Dr. Helmut Kaufmann](#)

## FINANCIAL CALENDAR 2024

February 15, 2024  
April 24, 2024  
July 25, 2024  
October 30, 2024  
April 1, 2024  
April 11, 2024  
April 16, 2024  
April 17, 2024  
April 18, 2024

Publication of 2023 annual financial statements  
Information on Q1/2024  
H1/2024 report  
Information on Q3/2024  
AGM record date  
Annual General Meeting (AGM)  
Ex-dividend date  
Dividend record date  
Dividend payment date

## INFORMATION ABOUT THE AMAG SHARE

ISIN  
Share class  
Ticker symbol: Vienna Stock Exchange  
Indices  
Reuters  
Bloomberg  
Trading segment  
Market segment  
First trading day  
Issue price per share in EUR  
Number of shares in issue

AT00000AMAG3  
Ordinary bearer shares  
AMAG  
ATX Prime, ATX BI, ATX GP, VÖNIX, WBI  
AMAG.VI  
AMAG AV  
Official trading  
Prime Market  
April 8, 2011  
19.00  
35,264,000

## IR CONTACT

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M +43 664 885 775 26  
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