

RENK - Detailed Consensus

Last Update: 13.03.2026

[EUR m]	Q1 2025 A	Q2 2025 A	Q3 2025 A	Q4 2025 A	FY 2025 A	Q1 2026 E	FY 2026 E	FY 2027 E	FY 2028 E	FY 2029 E	FY 2030 E
Group order intake											
- Consensus (Mean)	548,6	372,6	324,6	325,4	1.571,2	443,3	2.036,1	2.318,9	2.607,3	2.951,1	3.298,8
- Max						500,0	2.280,2	2.689,6	2.873,3	3.128,8	3.633,8
- Min						409,6	1.942,0	2.149,6	2.366,7	2.697,2	3.072,0
- Median						422,0	2.031,3	2.268,0	2.601,0	2.965,0	3.214,1
- Number of Estimates						5	7	7	7	6	6
VMS order intake											
- Consensus (Mean)	396,9	283,6	223,3	225,4	1.129,3	306,5	1.477,8	1.706,0	1.945,5	2.242,1	2.545,6
- Max						350,0	1.700,0	2.050,0	2.281,5	2.395,6	2.829,0
- Min						286,0	1.318,4	1.454,6	1.635,8	1.917,2	2.312,9
- Median						297,1	1.448,4	1.694,0	1.948,0	2.313,3	2.506,4
- Number of Estimates						5	7	7	7	6	6
M&I order intake											
- Consensus (Mean)	122,3	60,2	72,1	72,2	326,8	107,2	434,4	483,6	526,8	566,6	604,6
- Max						146,6	498,1	565,7	594,3	635,8	673,4
- Min						85,0	359,5	388,2	419,3	452,8	480,0
- Median						94,5	450,0	501,6	551,8	603,8	649,4
- Number of Estimates						5	7	7	7	6	6
Slide Bearings order intake											
- Consensus (Mean)	36,7	29,6	29,9	30,2	126,4	32,3	137,4	143,8	151,2	159,4	167,0
- Max						35,3	147,7	156,6	167,5	179,3	191,8
- Min						30,0	130,2	138,0	142,2	146,4	150,8
- Median						32,0	135,2	143,4	151,6	159,5	166,7
- Number of Estimates						5	7	7	7	6	6
Others/reconciliation order intake											
- Consensus (Mean)	-7,4	-0,8	-0,7	-2,4	-11,3	-4,5	-16,1	-14,2	-16,1	-13,3	-14,3
- Max						-3,8	-13,0	0,0	0,0	0,0	0,0
- Min						-5,0	-20,5	-20,8	-25,0	-27,0	-30,0
- Median						-4,7	-15,0	-15,0	-17,9	-15,0	-15,0
- Number of Estimates						3	5	5	5	5	5

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Group revenue											
- Consensus (Mean)	272,6	347,5	307,6	438,4	1.366,2	304,9	1.557,4	1.811,9	2.152,3	2.582,4	3.057,8
- Max						314,3	1.591,4	1.859,8	2.222,4	2.667,3	3.141,8
- Min						291,8	1.532,0	1.770,5	2.090,0	2.516,0	2.922,0
- Median						308,2	1.550,2	1.812,9	2.147,6	2.573,7	3.084,7
- Number of Estimates						6	11	11	11	11	11
VMS revenue											
- Consensus (Mean)	172,2	216,7	190,0	293,3	872,2	195,0	1.020,0	1.218,5	1.500,2	1.854,6	2.264,1
- Max						205,0	1.046,6	1.274,9	1.582,9	1.968,1	2.390,4
- Min						185,0	990,0	1.150,0	1.375,0	1.650,0	2.050,0
- Median						195,5	1.020,0	1.211,7	1.489,7	1.869,4	2.280,6
- Number of Estimates						6	10	10	10	9	9
M&I revenue											
- Consensus (Mean)	73,1	102,6	91,9	112,8	380,4	81,8	420,1	467,5	520,9	581,6	650,9
- Max						86,2	426,1	500,0	600,0	735,0	900,0
- Min						75,0	413,2	447,7	487,8	536,8	590,6
- Median						81,9	420,9	465,3	511,9	564,0	618,3
- Number of Estimates						6	10	10	10	9	9
Slide Bearings revenue											
- Consensus (Mean)	30,6	32,1	29,1	36,0	127,9	31,8	135,0	142,9	152,2	163,8	175,0
- Max						32,5	140,7	154,8	170,2	187,3	206,0
- Min						30,6	130,8	137,4	144,2	152,2	157,1
- Median						32,0	134,4	142,2	151,2	159,1	169,6
- Number of Estimates						6	10	10	10	9	9
Others/reconciliation revenue											
- Consensus (Mean)	-3,3	-3,9	-3,4	-3,7	-14,4	-3,8	-16,4	-18,0	-19,7	-20,7	-22,5
- Max						-3,0	-14,4	-14,4	-14,4	-14,4	-14,4
- Min						-4,8	-19,0	-21,5	-25,0	-28,0	-31,9
- Median						-3,7	-16,4	-18,6	-20,0	-20,3	-21,9
- Number of Estimates						6	10	10	10	9	9

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Group adjusted EBIT											
- Consensus (Mean)	38,4	50,8	51,8	89,4	230,4	43,8	273,6	335,2	416,6	520,3	639,6
- Max						46,6	282,2	343,9	436,5	552,4	682,4
- Min						41,9	254,7	324,0	399,8	486,9	602,3
- Median						43,5	273,3	333,5	414,4	527,2	645,0
- Number of Estimates						6	11	11	11	11	11
VMS adj. EBIT											
- Consensus (Mean)	28,6	38,0	38,1	73,6	178,3	33,1	218,6	270,2	343,9	436,9	545,0
- Max						35,5	221,9	280,5	361,0	458,3	573,1
- Min						30,9	214,5	256,0	309,5	381,0	495,0
- Median						32,8	218,0	271,6	345,0	442,3	550,3
- Number of Estimates						6	10	10	10	9	9
M&I adj. EBIT											
- Consensus (Mean)	7,5	11,4	12,3	14,0	45,2	8,8	49,5	56,7	64,4	74,1	84,3
- Max						9,7	55,5	69,2	83,0	105,0	130,0
- Min						7,9	46,7	52,5	59,3	64,4	70,9
- Median						8,7	48,7	55,8	63,2	71,5	77,9
- Number of Estimates						6	10	10	10	9	9
Slide Bearings adj. EBIT											
- Consensus (Mean)	5,3	5,1	4,3	8,2	22,9	5,5	24,0	25,4	27,2	29,5	31,6
- Max						5,8	25,5	28,3	31,4	34,8	38,5
- Min						5,0	21,5	22,9	24,5	27,1	28,4
- Median						5,6	24,0	25,5	26,8	28,5	29,9
- Number of Estimates						6	10	10	10	9	9
Others/reconciliation adj. EBIT											
- Consensus (Mean)	-3,0	-3,7	-2,9	-6,4	-16,1	-3,0	-15,1	-15,5	-15,8	-15,5	-15,8
- Max						-1,3	-5,0	-5,0	-5,0	-5,0	-5,0
- Min						-4,1	-17,3	-18,7	-20,5	-19,0	-20,0
- Median						-3,0	-16,1	-16,1	-16,1	-16,1	-16,1
- Number of Estimates						6	10	10	10	9	9

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Adjusted Net Income											
- Consensus (Mean)	10,2	41,3	34,8	55,5	141,9	22,3	168,0	203,3	261,2	340,5	435,6
- Max						24,9	183,5	220,9	286,3	378,8	475,3
- Min						15,2	133,0	133,0	183,5	262,2	400,4
- Median						24,0	169,8	210,4	267,2	344,6	435,0
- Number of Estimates						5	11	11	11	10	10
DPS											
- Consensus (Mean)					0,58		0,71	0,89	1,16	1,50	1,83
- Max							0,82	0,98	1,29	1,70	2,14
- Min							0,65	0,80	0,90	1,25	1,50
- Median							0,72	0,90	1,18	1,54	1,87
- Number of Estimates							11	11	11	10	10
EPS reported											
- Consensus (Mean)					1,00		1,42	1,72	2,50	3,26	4,14
- Max							1,68	2,15	2,75	3,51	4,41
- Min							1,28	0,00	2,17	2,82	3,86
- Median							1,38	1,86	2,53	3,29	4,10
- Number of Estimates							10	11	10	9	9
Free Cash Flow											
- Consensus (Mean)	-24,9	36,4	14,3	41,1	66,9	18,5	154,3	176,7	226,0	289,7	363,1
- Max						31,4	184,0	218,4	243,8	309,2	396,5
- Min						7,1	112,5	151,2	203,5	258,3	330,9
- Median						17,4	156,9	172,8	229,0	295,0	363,9
- Number of Estimates						5	10	10	10	9	9
Net working capital											
- Consensus (Mean)	334,0	314,0	343,0	345,0	345,0	405,2	398,9	441,1	504,9	599,3	693,1
- Max						456,5	514,5	602,7	689,4	820,3	947,2
- Min						353,9	317,4	346,7	397,5	466,2	551,6
- Median						405,2	380,6	424,2	484,7	586,4	707,7
- Number of Estimates						2	8	8	8	7	7

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Net debt											
- Consensus (Mean)	411,0	448,6	435,5	391,4	391,4	377,1	310,3	234,0	139,1	-91,8	-292,1
- Max						378,1	383,2	418,1	484,2	16,7	-160,4
- Min						376,1	261,9	142,8	-12,7	-193,4	-398,1
- Median						377,1	290,5	198,2	69,6	-83,8	-326,1
- Number of Estimates						2	10	10	10	9	9

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