Investor presentation

FY20 results

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Safety is a priority - ALS COVID-19 response

Safety guidance

- Handwashing and sanitation information;
- Hygiene and routine disinfection information and procedures;
- Screening for, and information for, employees feeling unwell;
- Physical distance markings and signs throughout facilities;
- Detailed response and contingency plans.

Equipment

- Additional sanitation products and PPE;
- IT resources to enable virtual meetings and remote working;
- Additional guarding, equipment, and walkways to reduce personal contact;
- No contact transfer stations installed for delivery of incoming samples and goods.

Communication

- Regular communication to employees;
- Website and social media announcements and communication to clients.

Restrictions

- On the number of people per common rooms and spaces;
- Only essential visitors or contractors permitted on sites;
- On social gatherings;
- On international and regional travel.

FY20 results

Group performance

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FY20 underlying NPAT of $188.8 million and statutory NPAT of $127.8 million

Underlying performance from continuing operations below

Revenue growth
$1,832 m, +10.0% vs pcp

- Organic revenue growth of +5.1% (Life Sciences +5.9%, Commodities +0.6%, Industrial +15.2%)
- Scope growth (acquisition and divestment) of +1.9%
- Favourable currency impact of +3.0%

EBIT*
$297.9 m, +6.0% vs pcp

- EBIT increase of $16.8m
- Life Sciences margin at 15.3%, +35 bps pcp (on track to reach +50bps target before impact of COVID-19)

NPAT* within guidance
$188.8 m, +4.3% vs pcp

- Earnings per share* of 39.1 cps, +5.4% pcp
- Final dividend of 6.1 cps compared to 11.5 cps in FY19, reflecting conservative capital management strategy and demonstrating a strong liquidity position

Balance sheet strength and liquidity

- Strong EBITDA* cash conversion rate at 97.1%
- Leverage ratio of 2.1x and gearing ratio of 41.9%
- Projected liquidity of ~$650m including $200m of increased bank facilities

Managing through COVID-19

- Diversified portfolio of businesses and geographies have proved resilient during COVID-19 pandemic to date with many deemed as ‘essential businesses’ and continue to operate
- Management acted swiftly to align cost base to client demand by leveraging ‘hub and spoke model’
- Total revenue decline of 9% in April 2020 (compared to pcp) primarily due to economic shutdowns. Several economies started to relax restrictions in last few weeks although too early to tell the impact on sample volumes
- Capacity for innovation (including launch of new COVID-19 testing services), disciplined acquisition strategy and supportive structural market trends to drive long-term growth

** Underlying from continuing operations before applying AASB 16.*

Revenue growth components of diversified business streams (at constant currency)

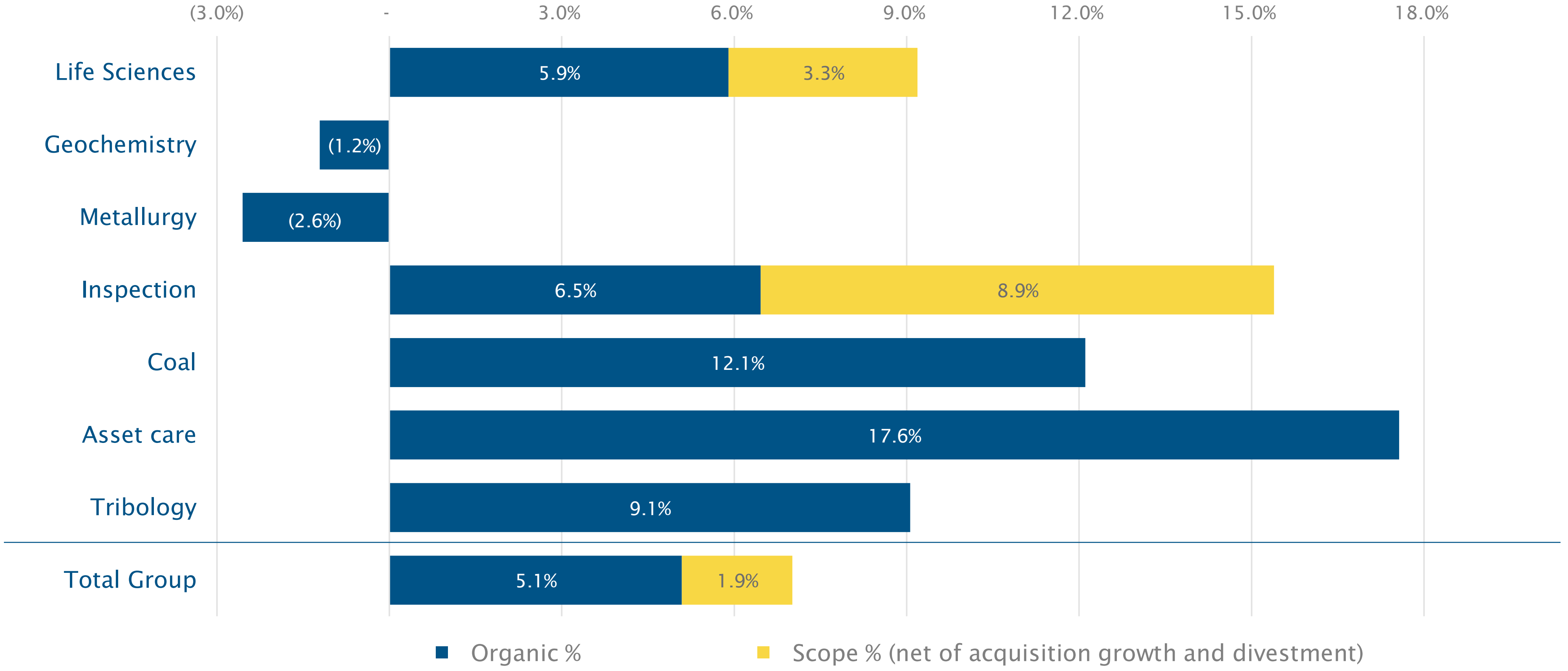
% of revenue

Life Sciences: 51%

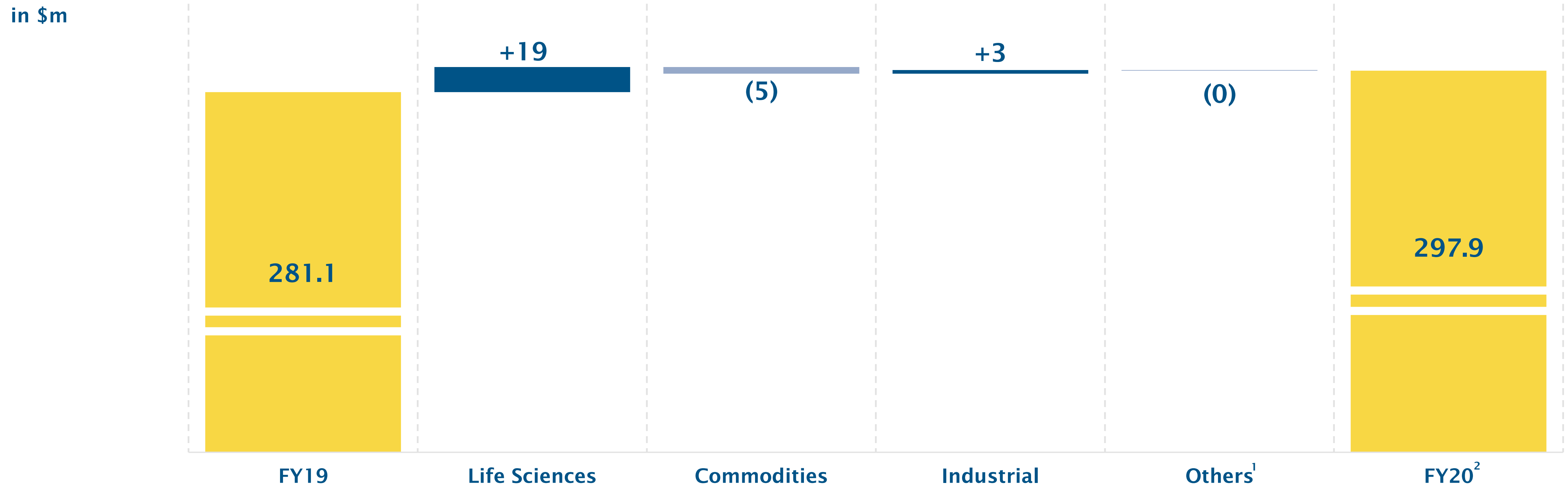
Commodities: 35%

Industrial: 14%

100%



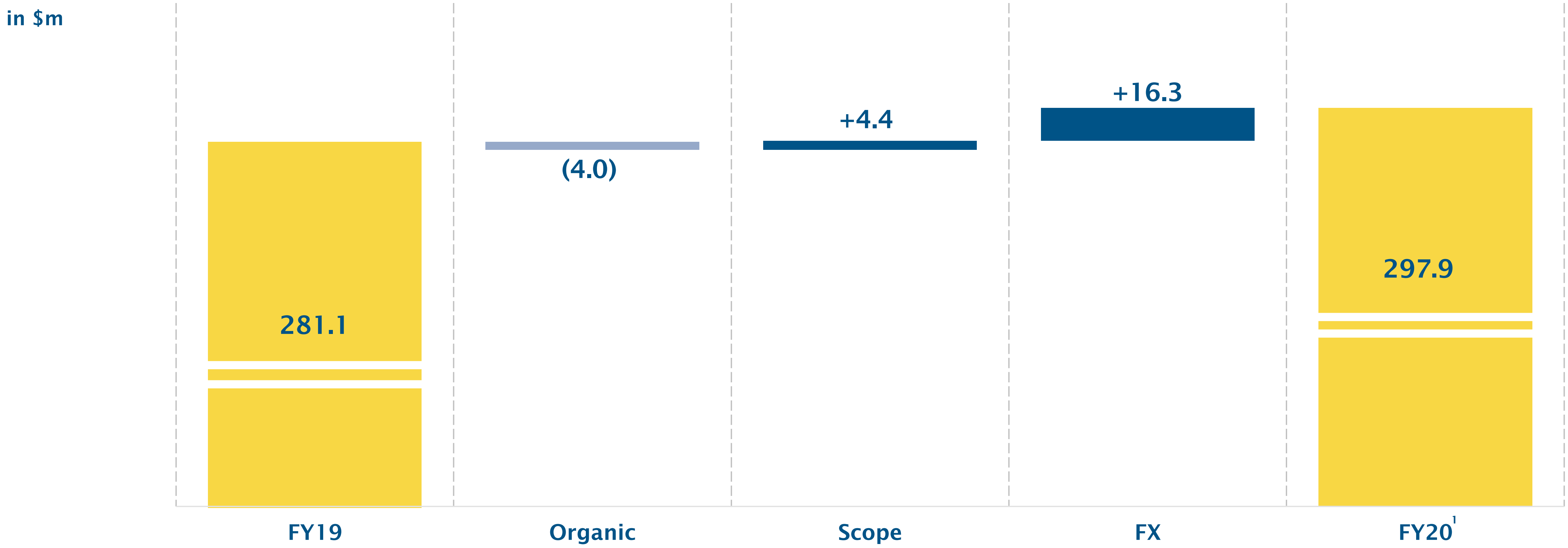
Underlying EBIT growth driven by Life Sciences (continuing operations)



	FY19	Life Sciences	Commodities	Industrial	Others	FY20
Margin	16.9%	15.3%	25.3%	9.7%		16.3%
PCP		+35 bps	(172) bps	(38) bps		(63) bps

1. Corporate costs + FX
2. Underlying EBIT before applying AASB 16

Underlying EBIT growth driven by accretive acquisitions and FX gains (continuing operations)



Margin	16.9%	(1.2) pts	+0.1 pts	+0.5 pts	16.3%

1. EBIT before applying AASB 16

FY20 financial summary

Full Year	FY19 ($m)	FY20 ($m)							
	Underlying*	Underlying before AASB 16*	Applying AASB 16*	Underlying after AASB 16*	Restructuring & other one-off items	Discontinued operations	Divestment & other business closures	Impairment and amortisation of intangibles	Statutory Results
Revenue	**1,664.8**	**1,831.9**	-	**1,831.9**	-	4.2	-	-	**1,836.1**
EBITDA	**352.9**	**378.8**	52.7	**431.5**	(15.5)	(0.7)	54.1	-	**469.4**
Impairment	**-**	**-**	-	**-**	-	-	-	(90.0)	**(90.0)**
Depreciation & amortisation	**(71.8)**	**(80.9)**	(44.8)	**(125.7)**	-	(1.1)	-	(7.6)	**(134.4)**
EBIT	**281.1**	**297.9**	7.9	**305.8**	(15.5)	(1.8)	54.1	(97.6)	**245.0**
Interest expense	**(32.0)**	**(33.4)**	(7.9)	**(41.3)**	(0.4)	(0.7)	-	-	**(42.4)**
Tax expense	**(67.1)**	**(74.0)**	-	**(74.0)**	0.9	-	-	-	**(73.1)**
Non-controlling interests	**(1.0)**	**(1.7)**	-	**(1.7)**	-	-	-	-	**(1.7)**
NPAT	**181.0**	**188.8**	-	**188.8**	(15.0)	(2.5)	54.1	(97.6)	**127.8**
EPS (basic – cents per share)	**37.1**	**-**	-	**39.1**	-	-	-	-	**26.5**
Dividend (cents per share)	**22.5**	**-**	-	**17.6**	-	-	-	-	**-**

** continuing operations*

Cash flow – strong cash conversation

50 million

CASH FROM OPERATIONS

97.1% EBITDA cash conversion*

CAPEX

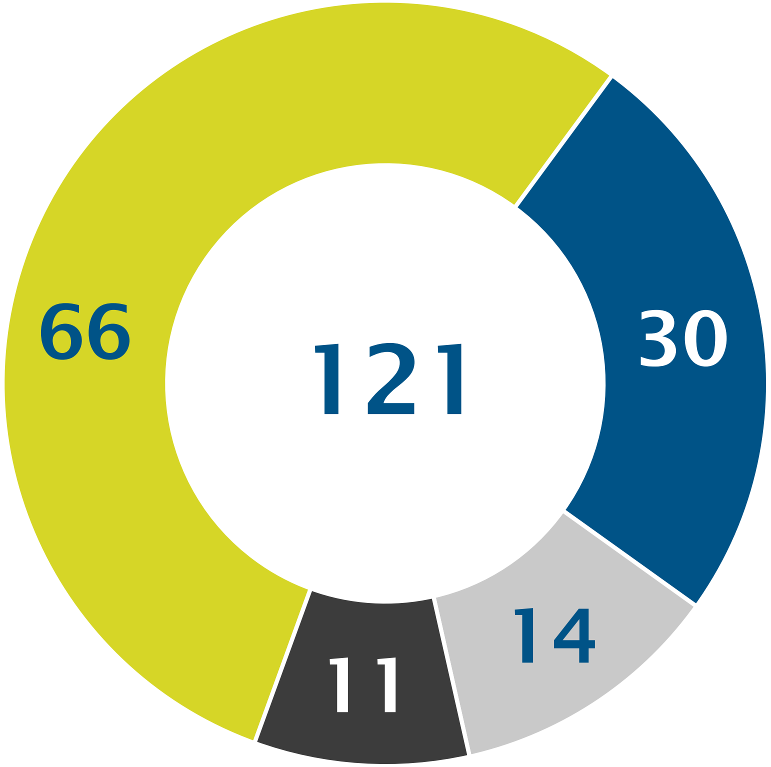
121 million = **6.6%** of revenue

Full year ($m)	FY19	FY20
Underlying operating EBIT (before AASB 16)	275.6	296.0
Depreciation & amortisation	73.3	81.2
EBITDA (before AASB 16)	348.9	377.2
Working capital	(35.4)	(17.9)
Other	2.9	7.0
Cash flow before CAPEX (before AASB 16)	316.4	366.3
CAPEX	(108.9)	(121.1)
Acquisitions	(65.8)	(119.1)
Divestments	5.7	66.9
Dividends paid	(98.0)	(112.0)
Issued capital bought back	(24.6)	(22.0)
Borrowings - movement	29.6	349.7
Interest and tax (AASB 16 adjusted)	(82.3)	(129.4)
Restructuring costs	(12.3)	(13.9)
Net increase/(decrease) in cash	(40.2)	265.4
Opening net cash	187.2	148.3
Effect of FX on cash held	1.3	10.3
Closing net cash	148.3	423.9

Analysis includes both continuing and discontinued operations
** Cash flow before CAPEX as % of Underlying EBITDA (before AASB 16)*

CAPEX by business – investing in growth

in $m



CAPEX as % of revenue	FY20	FY19
Life Sciences	7.0%	8.3%
Commodities	4.6%	5.0%
Industrial	5.3%	4.0%
Group infrastructure	0.6%	–
Total Group	**6.6%**	**6.5%**

Life Sciences: Green field and growth projects

Commodities: Maintenance and geographical expansion

Industrial: Geographical expansion, growth projects and new services

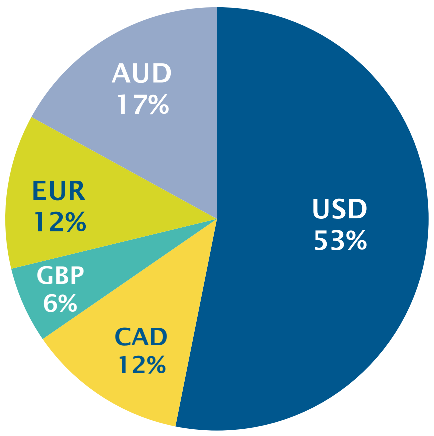
Group infrastructure: Investment in systems

Excludes acquisition CAPEX

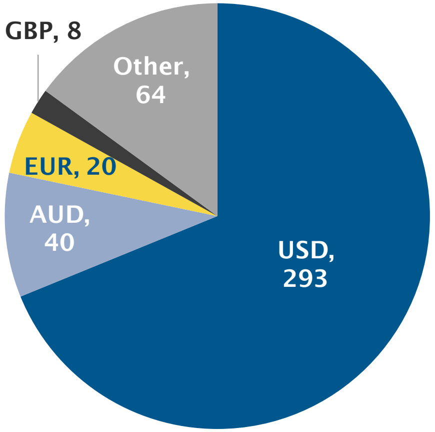
Debt metrics – strong balance sheet

	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20
STATISTICS					
Gearing Ratio (target <45%)	27%	29%	31%	37%	42%
Leverage (net debt/ EBITDA; max 3.25)	1.7	1.9	1.7	1.8	2.1
EBITDA interest cover (min 3.75)	7.7	9.2	11.3	10.5	11.0
BALANCE SHEET MEASURES					
Total Equity (in $m)	1,186	1,185	1,122	1,083	1,111
Net Debt (in $m) (AUD = 0.61 USD)	438	485	507	629	800

Debt Denomination

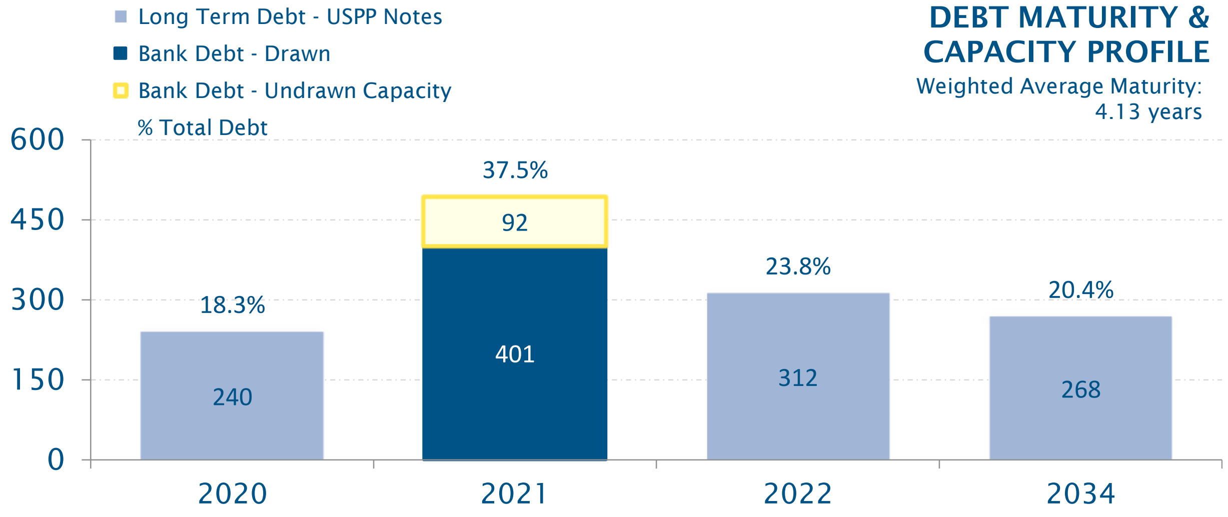


Cash Holdings AUD ($m)



DEBT MATURITY & CAPACITY PROFILE

Weighted Average Maturity: 4.13 years



$m, calendar year

Prudent capital management strategy

Cash flow from operations

- Strong underlying EBITDA cash conversion of 97.1% (on-track to achieve 100% cash conversion pre-COVID-19 impact).

CAPEX

- $121 m in CAPEX (6.6% of revenue).
- Continued investment in growth projects in Life Sciences and Industrial divisions.

Share buy-back program

- Buy-back continues through to December 2020 with a total program of $250m .
- Since inception of the buy-back program 22.0 million shares (representing 4.3% of the original base) have been bought back on-market for an overall consideration of $153.4 m, at an average share price of $7.04.

Dividend

- Final dividend of 6.1 cps (70% franked), with FY20 payout ratio of 45%
- Reflects prudent capital management strategy and strong liquidity position

Balance sheet

- Leverage ratio of 2.1 times (as at March 31st 2020).
- Strong balance sheet and liquidity level to finance operations and meet the maturation of the USPP debt tranche due in December 2020.

Capital management outlook

(until economic environment stabilises)

- Focus on liquidity preservation.
- Focus on cash generation (DSO and DPO), leveraging on excellent progress made in FY20.
- CAPEX restricted to essential maintenance and selected growth investments.
- Disciplined bolt-on acquisition strategy.

Strong liquidity in place

Liquidity

- Cautious approach in the uncertain economic environment, to build business resilience in the short-term while capitalising on growth opportunities in the medium and long-term.
- Total liquidity available as at 31 March 2020: ~$450m
- Increase in debt facilities: $200m secured from bank providers
- Projected liquidity available after increase in bank facilities: ~$650m

US Private Placement (USPP)

- $245m of bank debt drawn down to cover USPP tranche due at the end of 2020
- Continue to monitor USPP market for longer-term financing

Next generation TIC, innovation and technology

Technology and innovation are a key focus in our strategic roadmap

Life Sciences

- Development and roll-out of COVID-19 testing services for humans and surfaces
- Robotics in laboratories to improve efficiency.
- Artificial intelligence driving data review and reporting.
- Web and mobile apps for clients to view their data.

Commodities

- Market-leading position supported by innovative, exclusive testing methodologies.

Industrial

- Working with technology partners to expand ‘IoT’ solutions for asset condition monitoring.
- Investment in data integration and storage to provide clients with improved asset condition insight.
- Ongoing investment in laboratory automatic projects.

FY20 results

Review by business stream

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Life Sciences overview – organic and acquisition growth

- Total revenue growth of 13.0%, organic growth of 5.9%, scope growth of 3.3% (acquisitions and divestments) and 3.8% positive currency impact.
- Organic revenue growth driven by green fields and market share gains.
- Underlying margin of 15.3%, +35 bps vs pcp, driven by productivity improvements – on track to deliver +50bps target before COVID-19 impact in February and March.
- Strong performance in the USA, delivering +420bps underlying margin vs pcp.
- All regions delivered organic growth and margin improvement for the second successive year.

Environmental

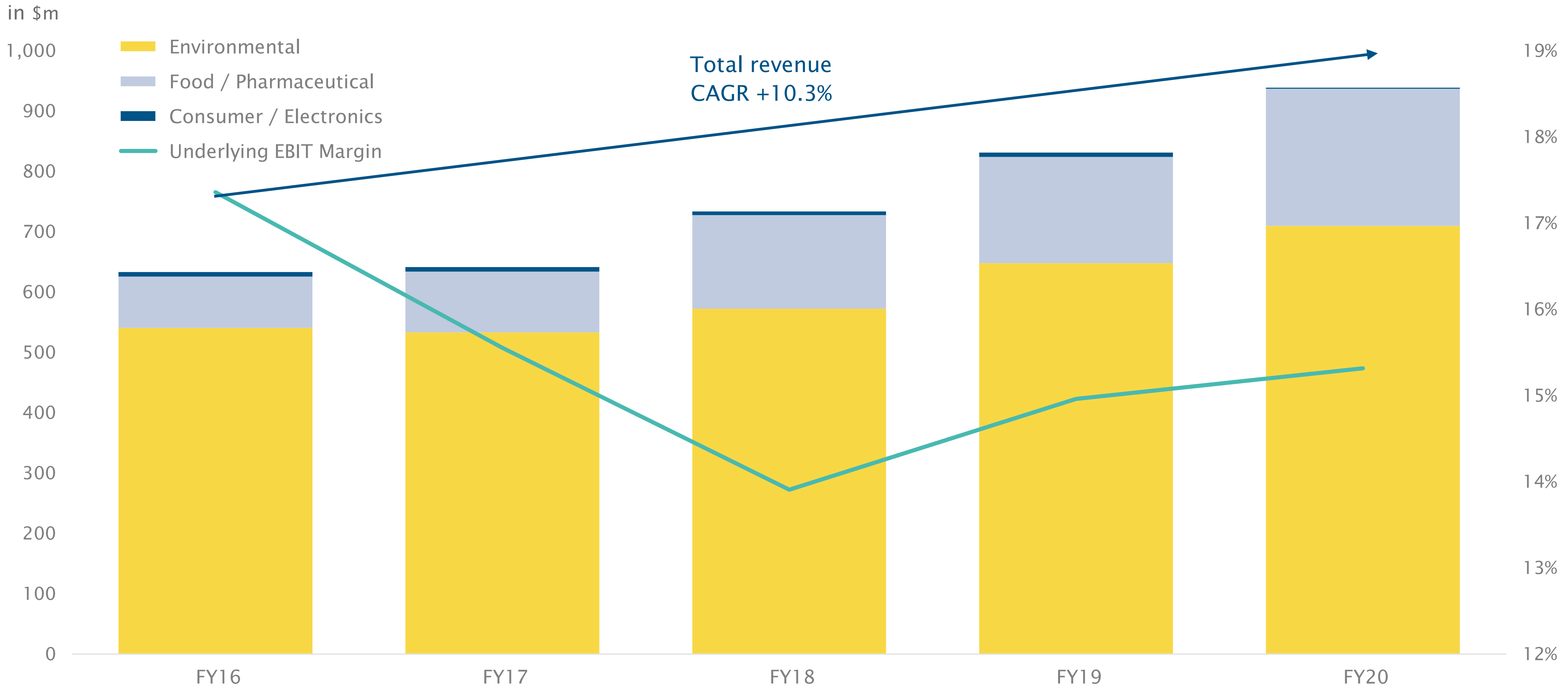
- Total revenue growth of 9.5%, organic growth of 8.1%.
- China environmental business divested during the year.
- Strong organic growth in Australia, LATAM, USA and Northern Europe.
- Margin improvement in key geographies.

Food and Pharmaceutical

- Execution of acquisition strategy with recent acquisitions (Aquimisa and ARJ) performing well, driving further margin improvement.

Underlying results	FY20 post-AASB 16	FY20 pre-AASB 16	FY19	Change pre-AASB 16
Revenue	$939.2 m	$939.2 m	$831.4 m	+13.0%
EBITDA	$222.8 m	$192.8 m	$166.8 m	+15.6%
EBITDA margin	23.7%	20.5%	20.1%	+46 bps
EBIT	$148.7 m	$143.9 m	$124.4 m	+15.7%
EBIT margin	15.8%	15.3%	15.0%	+35 bps

Life Sciences – portfolio and margin evolution



Recent acquisitions performing well

ARJ

~$30 m ANNUAL REVENUE

- Acquired in August 2019, based in Mexico.
- Founded in 1967, annual revenue of ~$30m, 500 employees.
- Largest private pharmaceutical testing laboratory in Latin America.
- **Strong performance since acquisition.**

Aquimisa

~$35 m ANNUAL REVENUE

- Acquired in December 2019, based in Southern Europe.
- Founded in 1994, annual revenue of ~$35m, 350 employees.
- Chemical and microbiological food testing, expanding existing footprint in Europe and adding new capability to ALS network.
- **Strong Q4 20 contribution despite COVID-19 shutdowns in key markets.**

Life Sciences outlook – managing cost base and new product development

- Leverage ‘hub and spoke’ model to manage cost base across all businesses and geographies.
- Ongoing focus on productivity improvement and efficiencies from innovation including data analytics from production management platform and driving method standardisation.
- Continue to develop and roll-out new COVID-19 and pathogenesis human and surface testing services.
- Leverage green field and growth CAPEX investments completed in FY20.
- Highly disciplined bolt-on acquisition strategy.

Commodities overview – organic growth despite Geochemistry sample flow decline

Geochemistry

- Sample volumes down 9% vs pcp primarily driven by lack of exploration by juniors.
- Organic revenue down 1.2%, price management and mix partially offset volume decline.
- Contribution margin of 27% demonstrates resilience of ‘hub and spoke’ model

Metallurgy

- Revenue decline of 2.6% vs pcp due to strong prior period and COVID-19 impact in Q4 FY20.
- Strong gold, iron ore and copper related activity with growing rare earth contribution.
- Strong margin of 24% based on cost control, solid client relationships and market-leading technical capabilities.

Inspection

- Revenue growth of 18.6% vs pcp, with 6.5% organic and 8.9% scope.
- Execution of international expansion strategy with green field investments and acquisitions
- MARSS International (acquired in Jan 2019) performing above expectations.

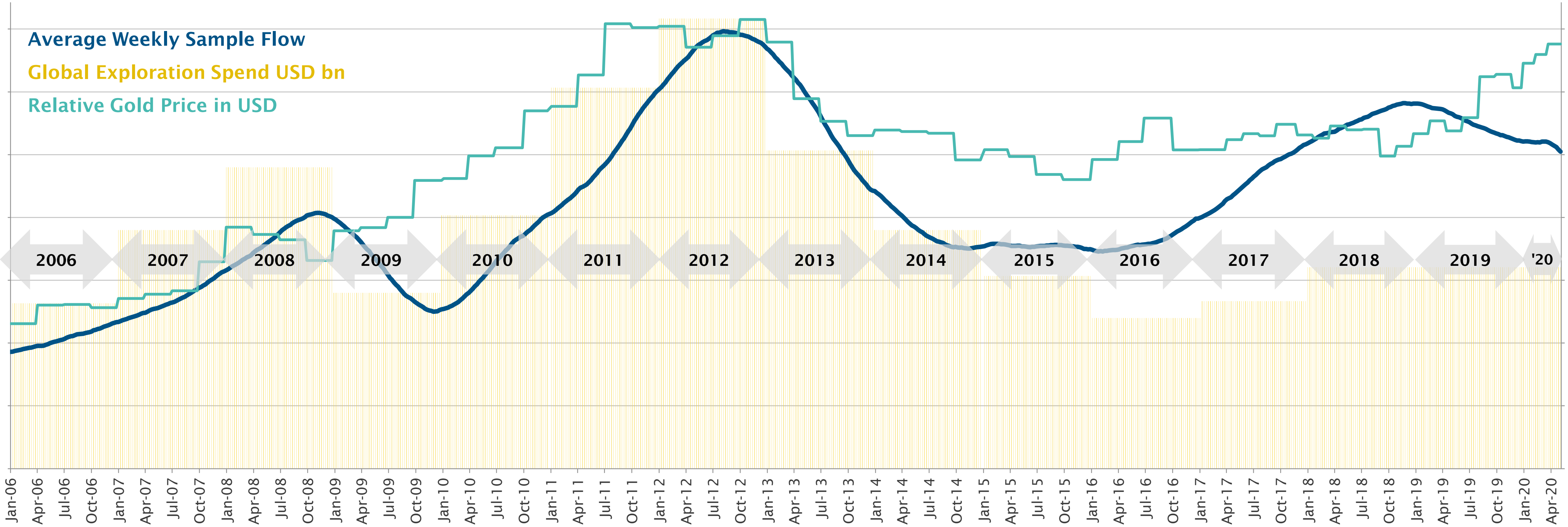
Coal

- Revenue growth with increasing contribution from bore-core work.
- Independent investigation into Australian Superintending and Certification unit completed.
- Stringent additional controls in place with process improvements and automation nearing completion.

Underlying results	FY20 post-AASB 16	FY20 pre-AASB 16	FY19	Change pre-AASB 16
Revenue	$642.2 m	$642.2 m	$620.3 m	+3.5%
EBITDA	$201.4 m	$185.5 m	$189.6 m	(2.2)%
EBITDA margin	31.4%	28.9%	30.6%	(167) bps
EBIT	$164.5 m	$162.5 m	$167.7 m	(3.1)%
EBIT margin	25.6%	25.3%	27.0%	(172) bps

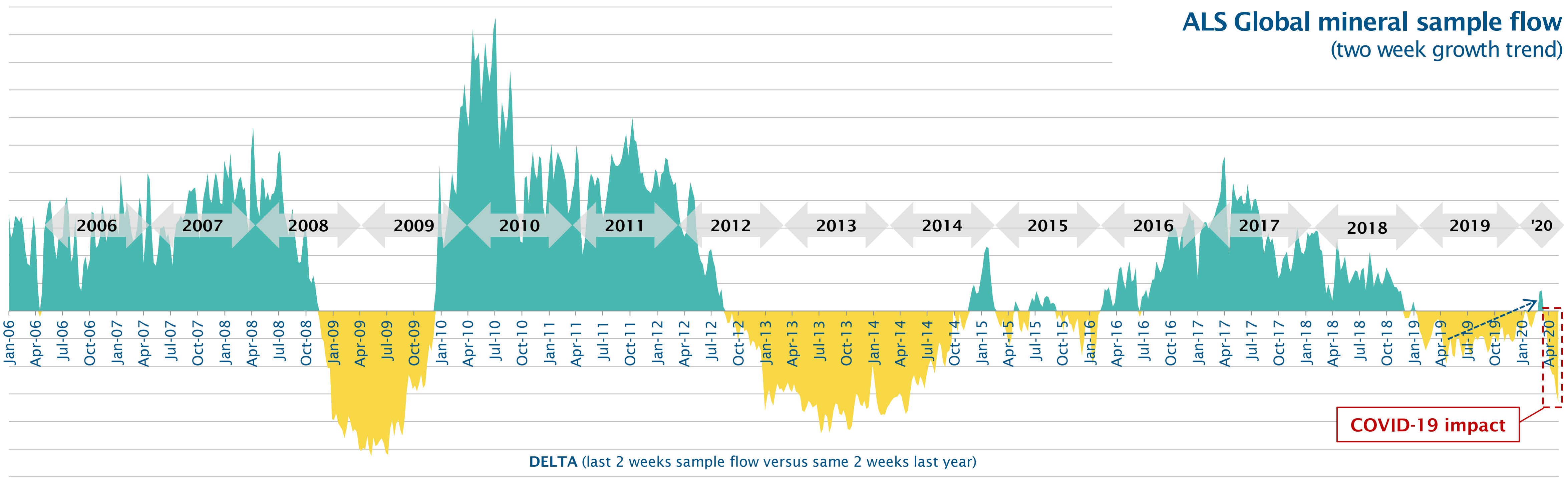
Geochemistry – early signs of growth in mining activity before impact of COVID-19

ALS Global mineral sample flow (trailing 52 week running average) and global exploration spend



- Early signs of junior equity raisings improvement in Q4 FY20, however exploration spend was limited due to impact of COVID-19 pandemic
- Gold price (~50% of volume) remains supportive.
- Requirement to replenish resources to drive the need for exploration in the medium-term.

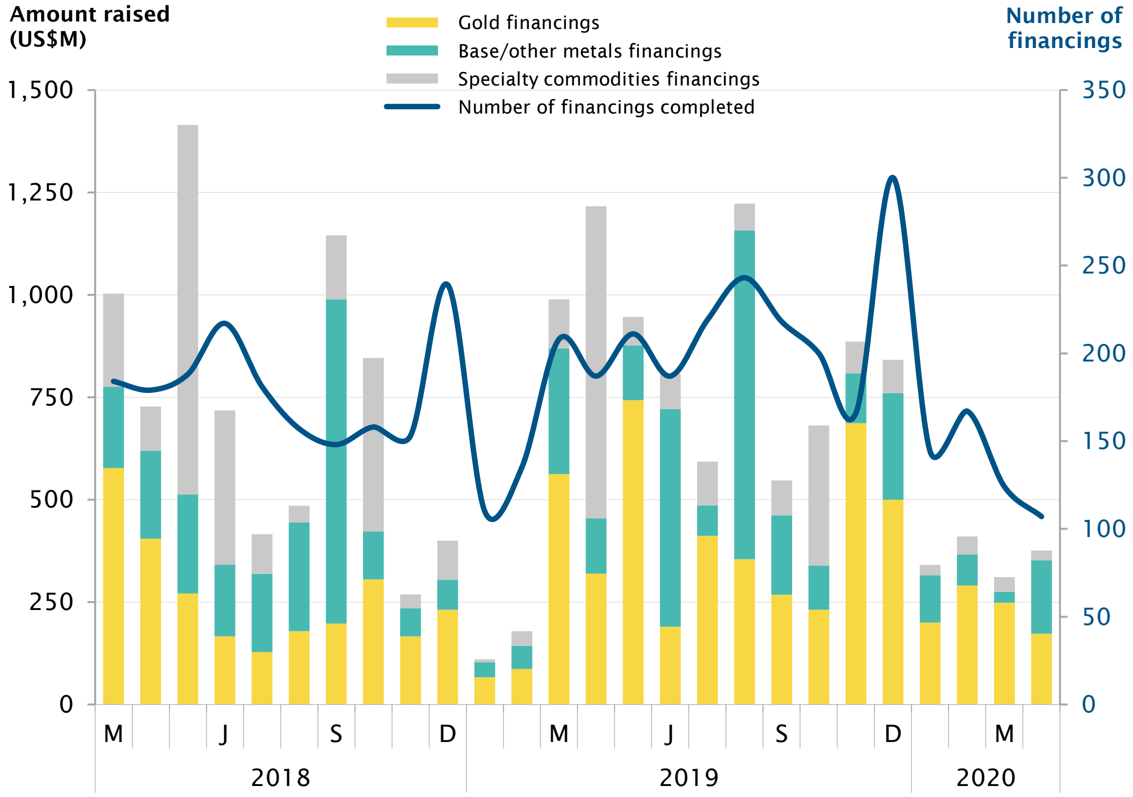
Geochemistry – sample flow growth before impact of COVID-19 pandemic



- **Sample flows volume down 9% for FY20 vs. pcp:**
  - Primarily driven by lower volumes from junior miners, major producer volume was stable.
  - Geopolitical uncertainty in LATAM and Africa impacting some mining operations.
- **Improvement in sample flow trend in H2 FY20 :** H1 vs pcp : -11% / H2 vs pcp -6%
- **Decline in sample flows in FY21 to date primarily due to COVID-19 pandemic – immediately prior there were early signs of growth in mining activity in most regions of the world**

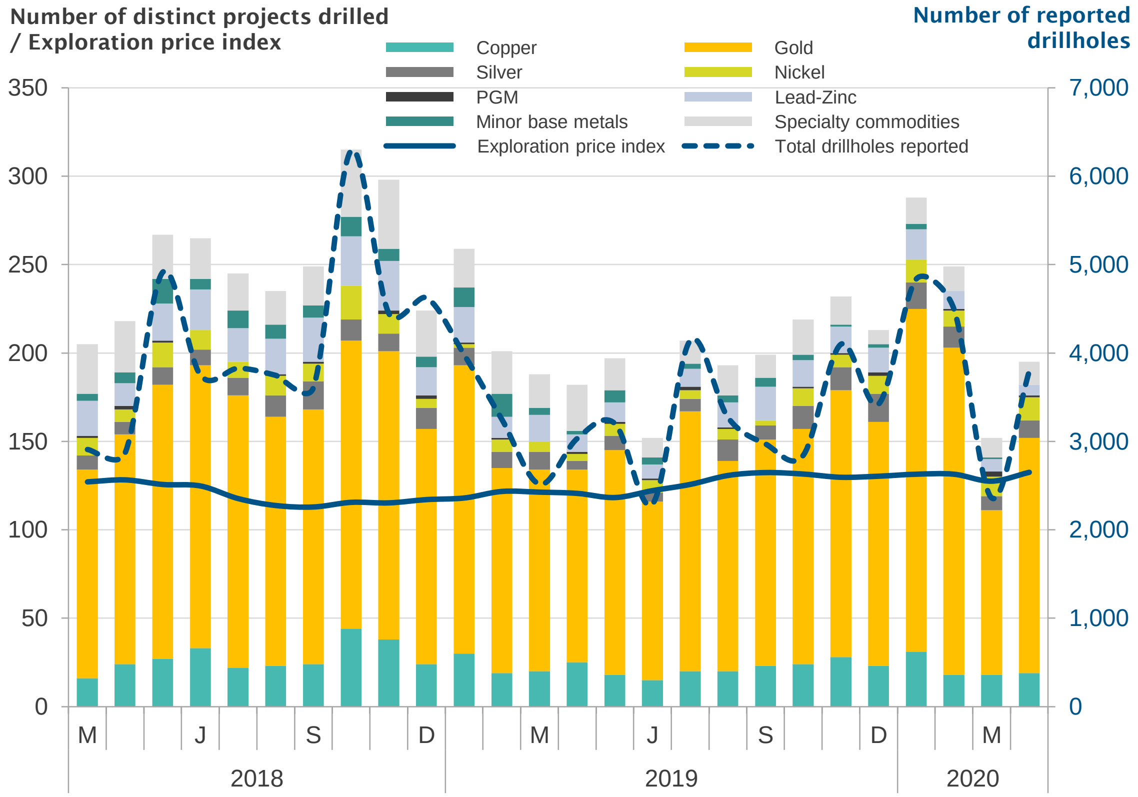
Junior and intermediate fund raisings and pipeline activity showing some improvement

Junior and intermediate financings, March 2018 – April 2020



Data as of May 7, 2020. Source: S&P Global Market Intelligence

Project drilling activity by commodity, March 2018 – April 2020



Data as of May 7, 2020. Source: S&P Global Market Intelligence

- Equity financings for junior and intermediate miners and drilling activity are key lead indicators of Geochemistry sample flow volume
- Subdued activity in March 2020 due to COVID-19 pandemic followed by an improvement in April 2020

Commodities – long-term strategy unchanged

- Geochemistry using ‘hub and spoke’ model aligning cost base with client demand. Long-term strategy remains unchanged with growth through new opportunities (including mine sites) and innovation.
- Metallurgy continues to see solid ongoing demand for gold, iron ore and copper related services.
- Inspection business capitalising on the green field investments completed in FY20, as part of its international expansion strategy.
- Coal oversupply and low coal price reducing market activity in the short term.

Industrial overview – organic growth in FY20 with challenging market ahead

Asset Care

- Total revenue growth of 19.4%, with strong organic growth of 17.6%
- Australia growth driven by maintenance revenue from energy and mining sectors.
- USA growth driven by green field investments.
- On track to deliver margin improvement before COVID-19 impact

Tribology

- Total revenue growth of 12.9%, organic revenue growth of 9.1%.
- Australia growth supported by favourable mining production environment.
- USA growth driven by diversification of service offering (innovation and technology) and focused business development efforts.

Underlying results	FY20 post-AASB 16	FY20 pre-AASB 16	FY19	Change pre-AASB 16
Revenue	$250.5 m	$250.5 m	$213.1 m	+17.6%
EBITDA	$38.3 m	$31.7 m	$27.7 m	+14.4%
EBITDA Margin	15.3%	12.7%	13.0%	(32) bps
EBIT	$25.2 m	$24.2 m	$21.4 m	+13.1%
EBIT Margin	10.1%	9.7%	10.0%	(38) bps

Industrial outlook – rationalisation and leveraging innovation

Asset Care

- Cost reduction and rationalisation initiatives to protect margin.
- Concentrate business development efforts on markets not significantly impacted by COVID-19 pandemic.

Tribology

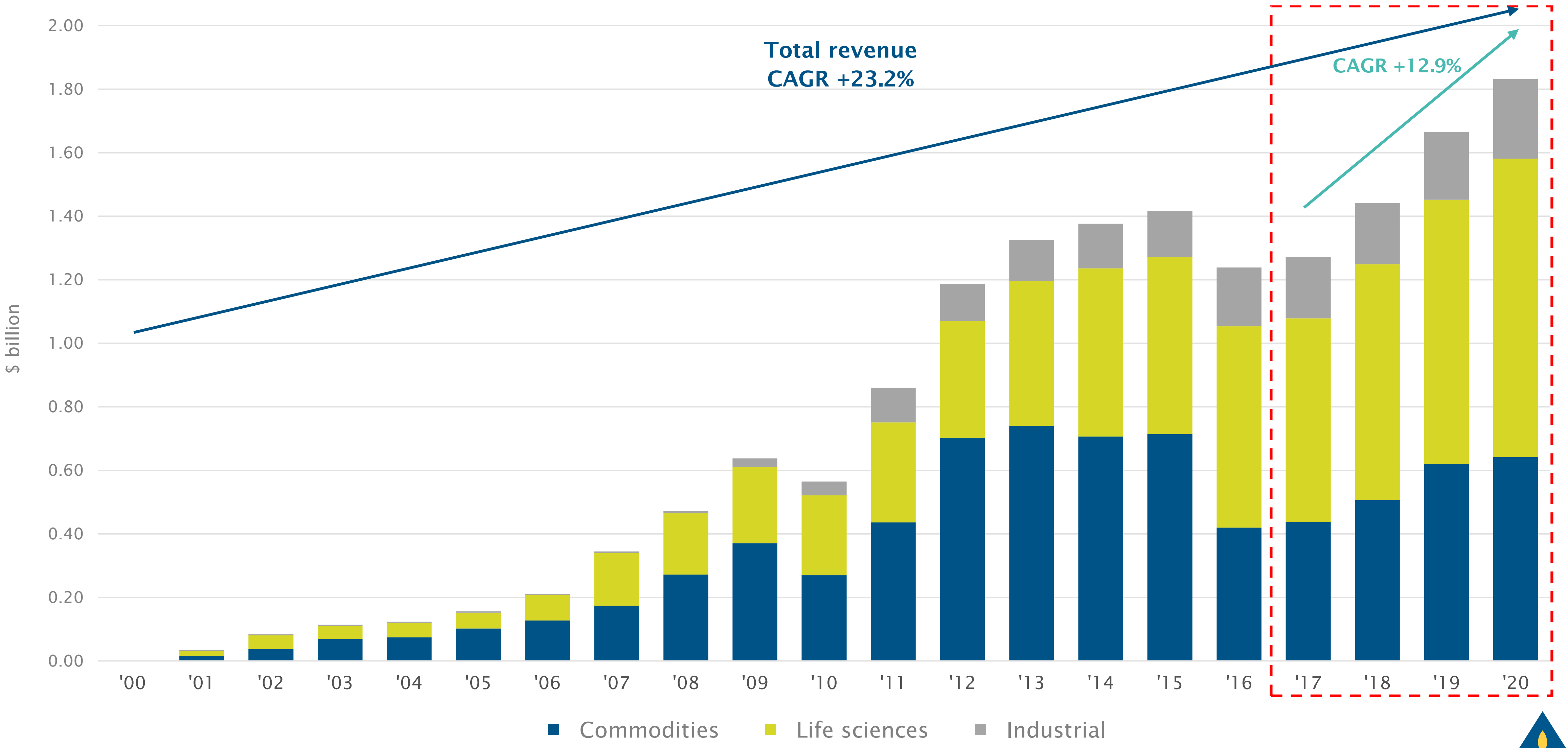
- Continue to execute on global business development strategy to deliver organic growth.
- Leverage implemented innovation, automation and data analytics to drive revenue and EBIT growth.

Group FY20 performance vs strategic priorities

Shorter-term strategic priorities	FY20 performance
Life Sciences	
Strong organic growth and margin expansion (pre AASB 16 impact) across all regions	• 5.9% organic growth. • +35 bps margin improvement vs FY19 (on track to deliver +50bps pre-COVID-19). • All regions delivered positive organic growth and margin improvements for the second successive year.
Commodities	
Single digit revenue growth across the division	• 3.5% revenue growth.
Stable Geochemistry sample flow volumes	• -9% sample flow vs pcp, largely offset by price management and mix.
Industrial	
Drive revenue growth and stabilise margin	• 17.6% revenue growth. • -38 bps margin vs FY19 (on track to deliver margin improvement pre-COVID-19).

Longer-term strategic priorities	FY20 performance
Non-cyclical businesses contributing 50% of Group EBIT by 2022	• 51% EBIT contribution in FY20 (47% in FY19).
Strategic acquisitions in key growth markets	• ARJ and Aquimisa acquired in FY20, ~$65 m combined annual revenue, both performing in-line with expectations. • Highly disciplined acquisition strategy.
Investment in technology and innovation	• Continued focus and investment across the businesses with selective CAPEX spending.

History of ALS revenue mix (from continuing operations) – increasing diversity



FY20 results

Managing through COVID-19

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Managing through COVID-19

- Industry-leading safety performance.
- Strong balance sheet with ~$650 million of liquidity available including ~$200 million increase to existing facilities agreed with bank debt providers.
- Swift action taken by management to align cost base with client demand while maintaining strong capability in people, capacity, supply chain and client service.
- Group has demonstrated resiliency during the COVID-19 pandemic to date, due to diversified portfolio of businesses across a wide range of geographies, with many operations deemed as ‘essential businesses’ that continue to operate.

Managing through COVID-19

- Decision to impair Latin American Life Sciences business reflects enhanced risk profile of market, particularly in Brazil and Peru, due to ongoing socioeconomic issues, prolonged impact from COVID-19 and material devaluation of currencies. Impairment to Industrial division also due to impact from COVID-19 combined with recent downturn in oil and gas sector.
- Total revenue decline of 9% in April 2020 (compared to pcp) primarily due to economic shutdowns making sample collection difficult (particularly in Life Sciences), several economies have started to relax restrictions in last few weeks although too early to tell the impact on sample volumes.
- Capacity for innovation and product development (including recently launched COVID-19 human and surface testing services) and supportive structural market trends (such as increasing outsourcing by clients) to drive long-term growth.

FY20 results

Financial appendix

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One-offs, amortisation and impairment of intangibles – FY20

in $m	Start up	Restructure	Acquisition	Other One-off Items	Divestment & Other Business Closures	Total	Amortisation and Impairment of Intangibles
	Restructuring and Other One-Off Items						
Commodities	-	(0.9)	(0.1)	(1.1)	-	(2.0)	
Life Sciences	(6.3)	(1.7)	(1.3)	(0.3)	-	(9.5)	(50.0)
Industrial	(0.8)	(0.1)	-	0.2	-	(0.8)	(40.0)
Corporate	-	-	(3.3)	0.2	-	(3.1)	(7.6)
Discontinued	-	-	-	(0.1)	54.1	54.0	
Total	**(7.1)**	**(2.7)**	**(4.6)**	**(1.1)**	**54.1**	**38.6**	**(97.6)**

Over 75% of one-off costs, excluding divestment and business closures (excluding impairments), is related to execution of ALS growth strategy (start-ups and acquisitions).

Nature of One-Off costs :

- Startup: losses incurred during startup phase of new businesses
- Restructuring: office closing costs and severance costs linked to business reorganisation and restructuring plans
- Acquisition: transaction and integration costs linked to acquisitions
- Other one-off Items: corporate (realised FX in intercompany loan), discontinued (oil and gas business)

Corporate cost evolution

	H1 FY18	H2 FY18	H1 FY19	H2 FY19	H1 FY20	H2 FY20
Corporate costs*	12.4	14.1	18.2	18.8	19.7	19.4
Revenue	721.6	725.3	826.1	838.7	919.1	912.8
Corporate costs % on revenue	1.7%	1.9%	2.2%	2.2%	2.1%	2.1%

** exclude net foreign exchange gain or loss.*

- FY20 absolute cost increase mainly driven by increase in insurance premium and investment in human capital

Underlying effective tax rate movement

$m	FY20 After AASB 16	FY19	Change YoY
Underlying profit before tax (from continuing operations)	264.5	249.1	6.2%
Tax	(74.0)	(67.1)	10.3%
Underlying effective tax rate (ETR)	28.0%	27.0%	1.0 pts

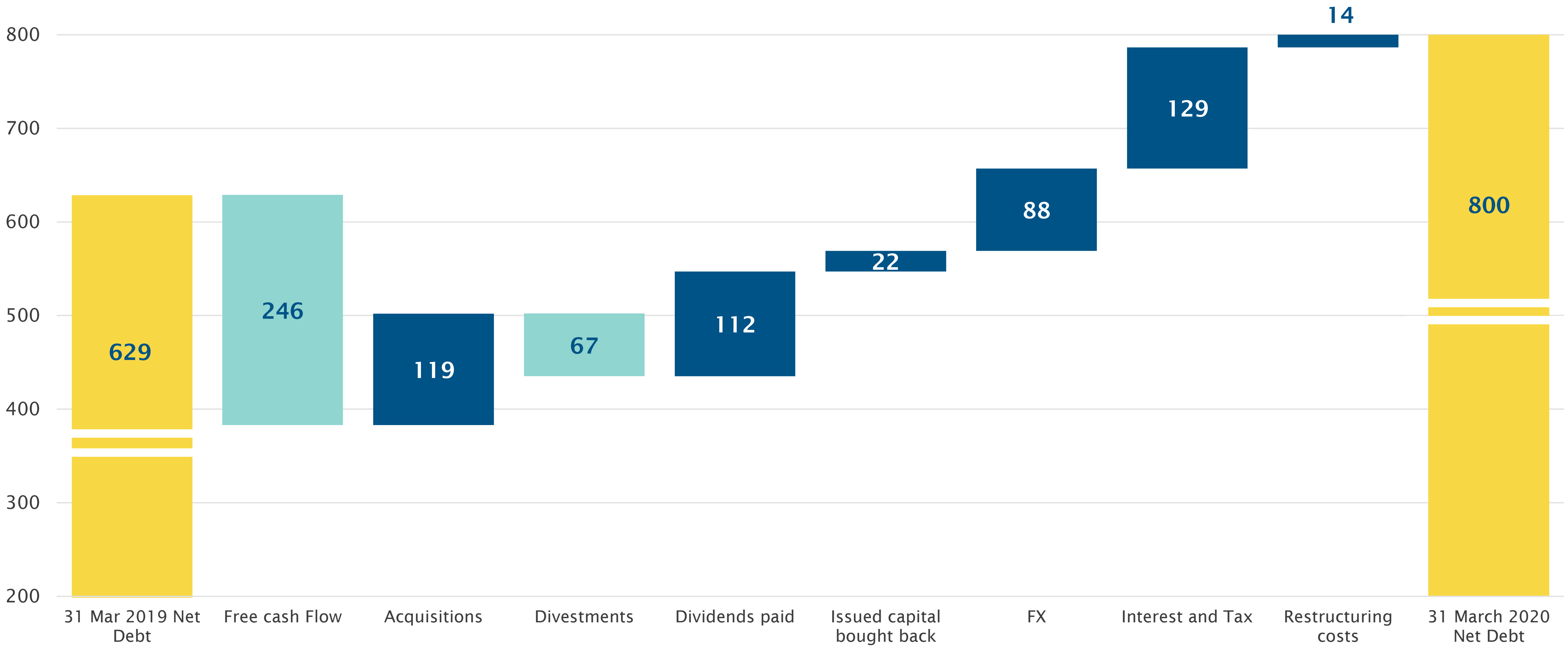
FY20 vs FY19

- Increase in underlying ETR driven by changes to the anti-hybrid interest deductibility rules in Australia
- Treatment of tax startup costs for green field operations

FY21 outlook

- ETR is anticipated to be ~29% on an underlying basis

Net debt evolution



Sustainability program – FY20 achievements

People

Health & Safety
Safety is a Priority

Diversity & equality
Respecting differences

Training & development
Investing in talent development

Innovation & Technology
Embracing innovation and technology

Human rights
Worker's rights upheld / Modern Slavery Assessments

- ☑ 11% improvement in total recordable injury frequency rate (record low injury rate).
- ☑ Improved employee satisfaction survey results.
- ☑ 53% new female professional hires.
- ☑ Motor vehicle tracking (IVMS) introduced across the fleet.

Environment

Operational Environmental Performance
Mitigation of environmental emissions

Energy management
The pursuit of energy efficiency

Waste reduction
Reduce, reuse, recycle

Water conservation
Managing a scarce resource

Climate Change
Managing and reducing our CO_2 emissions

- ☑ On track with 5% reduction target in scope 1 & 2 greenhouse gas emissions intensity by 2021 (based on 2018 baseline).
- ☑ Strengthened climate change reporting using TCFD framework.
- ☑ Over 50 tonnes reduction in plastic from sample bottle miniaturisation project (since inception in 2010).
- ☑ Continued implementation of LED lighting program.

Society

Economic Contributions
Supporting local stakeholders

Local investment
Enriching our communities / ALS Workplace Giving / Community Sponsorships

Employment creation
Creating jobs in the local community

- ☑ University student programs continued
- ☑ 'ALS Cares' Workplace Giving Program established
- ☑ Support for 3 key charities
- ☑ AUD$1.8 bn economic contribution
- ☑ Over 1,000 new employees joined ALS

Governance

Financial performance
Maximise return for shareholders

Anti-bribery & corruption
Zero tolerance for bribery and corruption

Honesty & integrity
An ALS core value

Regulatory compliance
Systems to maintain legal compliance

Enterprise Risk Management
Building resilience
Information Security

- ☑ New whistleblower protection training rolled out
- ☑ Commenced implementation of a new global ERP
- ☑ Revised Crisis Management Procedures to build more resilient businesses.
- ☑ Performed an external review of IT network to ensure strong IT security.

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