

Continued strong growth

Summary January – March 2022

- Rental income increased by 182 per cent and amounted to SEK 50 M (18).
- Net operating income increased by 172 per cent to SEK 33 M (12).
- Profit from property management increased by 330 per cent to SEK 13 M (3).
- Profit for the property business amounted to SEK 155 M (4), where changes in the value of properties had a positive impact on earnings of SEK 179 M (3).
- Earnings per share amounted to SEK 1.6 (0.0).
- Net asset value per share increased to SEK 13.8 per share (7.1).
- Acquisitions of properties with a property value of SEK 178 M.
- Directed share issues, a total of 851,494 shares, have been carried out in order to finance property acquisitions.
- Framework for vision, goals, strategy and dividend policy updated to support aggressive growth and value creation in real estate for warehousing, logistics and light industry.
- Decision on a preferential rights issue of SEK 350 M before issue costs, in order to secure the prospect to realize growth targets. A total of 19,428,133 ordinary shares issued, corresponding to 16.7 per cent of the total number of votes in Logistea.

Significant events after the end of the balance sheet date

- The rights issue was completed on April 12 with 38.6 per cent oversubscription.
- 19 properties with a value of SEK 892 million have been agreed on acquisitions after the end of the quarter. Leasable area amounts to 153,500 sqm and the rental value to SEK 68 M. The acquisition on 5 May 2022 of a portfolio of 14 properties with a value of SEK 745 M constitutes the majority of this.
- After the balance sheet date, Logistea has entered into an agreement to issue a total of 3,785,258 ordinary B shares in connection with acquisitions with an average price of SEK 33 per share to a total value of SEK 125 M.

MSEK	Jan-Mar		Apr-Mar	Jan-Dec
	2022	2021	2021/2022	2021
Property value	3,075	956	3,075	2,607
Rental income	50	18	125	93
Net operating income	33	12	86	65
Profit from property management	13	3	28	18
Result of the period for continuing operations	155	4	469	317
NAV per ordinary share, SEK	13.8	7.1	13.8	11.8
Earnings per ordinary share A and B, SEK	1.6	0.0	5.0	3.7
Occupancy rate, economic, %	99.3	99.7	99.3	95.2
Equity ratio, %	37.1	42.6	37.1	36.0
Loan to value (LTV), %	56.6	51.7	56.6	55.9

Outcome and comparative figures in Logistea's Interim Report 2021 refer to the company's real estate operations. Financial results for the company's fashion operations are broken out in the respective financial account with explanations in Notes 4 – 6. For definitions of key figures see page 20.



CEO's statement

"In the first quarter, the value of the property portfolio increased from SEK 2,607 million to SEK 3,075 million. At the time of publication of this report on 6 May 2022, the property value has increased further – to SEK 3,967 million"

During the first quarter, Logistea continued its rapid growth journey, towards the goal of becoming one of the leading real estate companies focused on warehousing, logistics and light industry. In the first quarter, the value of the property portfolio increased from SEK 2,607 million to SEK 3,075 million. At the time of publication of this report on May 6, 2022, the property portfolio has increased further – to SEK 3,967 million through the properties we have taken over and the purchase agreements we have entered into so far in the second quarter, an increase of 52 per cent since the turn of the year. This is in line with the financial targets we communicated in February 2022, which include reaching a property value above SEK 15 billion by the end of 2024 and that we will also annually complete 25,000 sqm of leasable area.

We continue to focus on long leases and stable tenants in good locations, and are pleased to have been able to welcome seven new tenants in four locations during the quarter. The underlying average valuation of the investment properties at the end of the quarter was 5.8 per cent (6.1).

Growth with good yields

The quarter was very much marked by Russia's invasion of Ukraine, and the capital market was noticeably affected. Our new acquisitions are partly financed through bank loans and it has been important with the established relationships we have with some of the largest Nordic banks. The vast majority of our leases are indexed annually with the CPI development. This, combined with the fact that most of the agreements are also so-called triple net agreements where the tenant is responsible for tariff-based costs such as energy and heating, means that Logistea largely has an inflation-proof rental and earning capacity.

The business opportunities are many, but we act at the pace we believe best at the moment – every individual deal should be good for Logistea and our shareholders. Growth is important, but most importantly, we can deliver a good return.

Logistea's revenues have increased sharply and amounted to SEK 50 million (18), an increase corresponding to 210 per cent. Profit from property management increased with impressively 330 per cent to SEK 13 million (3). Profit after tax for the first quarter amounted to SEK 155 million (4) where unrealised changes in the value of properties had a positive impact on earnings of SEK 179 million (3).

The net asset value at the end of the quarter amounted to SEK 13.8 per share, compared with SEK 11.8 per share at year-end, corresponding to an increase of 17 per cent. When considering recent transactions and the rights issue, the net asset value per share amounts to SEK 15.1.

In order to further enable continued expansion, a rights issue was carried out during the first quarter with a completed subscription period on 12 April. The issue was oversubscribed by 38.6 per cent and provided the company with SEK 350 million before issue costs. Until the publication of this report on 6 May 2022, we have since the turn of the year entered into an agreement to issue a total of 4,636,752 ordinary B shares in connection with acquisitions with an average price of SEK 31.90 per share with a total value of SEK 148 million.

The strong support that shareholders showed us in the rights issue is gratifying. The capital from the issue constitutes an important component of our acquisition capacity in the near term and in creating long-term value for our shareholders

Good development in project development

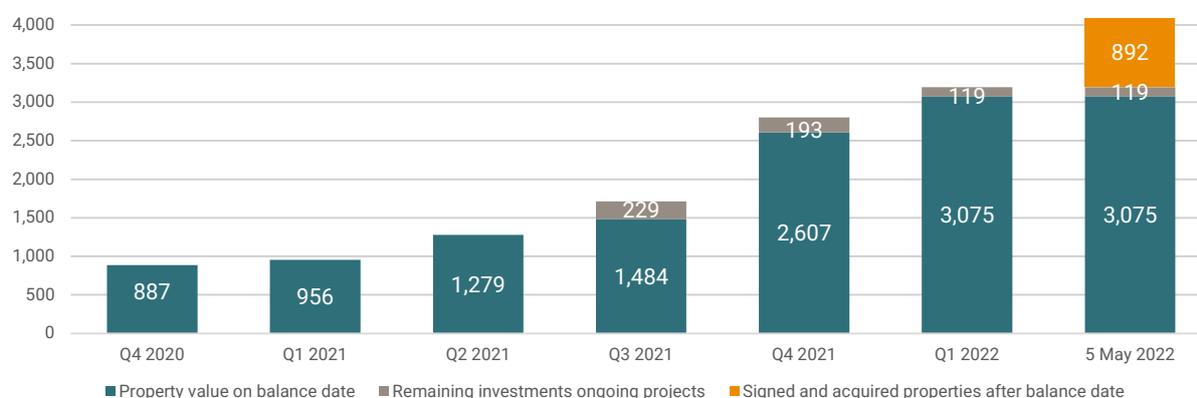
At the end of the quarter, our first project in Vaggeryd Logistikpark was completed. According to the plan, a building of 13,500 square meters was completed for, among others, the tenants Azelio and Båstad Lager och Logistik. Another exciting opportunity is our project in Lockryd in Svenljunga for a proposed battery factory of approximately 380,000 sqm where we entered into a letter of intent at the end of 2021. It is proceeding according to plan and the detailed planning process began during the quarter.

Organizationally, we in the management team have grown with Maléne Broman, Maria Kruse and Jesper Carlsöö. Maléne, with responsibility for management, will ensure effective and sustainable management. Maria, with responsibility for sustainability, will be an important part of developing the sustainability work for Logistea. Jesper, with long-term experience from leasing warehousing and logistics, will play a crucial role in project development and project leasing. Logistea currently has approximately 300,500 square meter building rights and with Jesper's knowledge and track record, we look forward to building many new attractive sustainable logistics facilities.

Niklas Zuckerman
Chief executive officer

Logistea's development

Property value per quarter, SEK M



Earning capacity, SEK M

MSEK	31/12/2020	31/03/2021	30/06/2021	30/09/2021	31/12/2021	31/03/2022	05/05/2022
Income investment properties	60	68	85	87	155	179	242
Income project properties	-	-	-	34	34	20	25
Property costs	-18	-19	-21	-22	-31	-33	-39
Net operating income	42	49	64	99	158	166	228
Central administration	-6	-7	-10	-15	-20	-26	-28
Net finance costs	-10	-12	-20	-23	-53	-55	-60
Profit before tax	26	30	34	61	85	85	140

The table above presents the company's earning capacity on a 12-month basis. The table is not to be equated with a forecast. Net operating income is based on lease agreements contracted as of the balance sheet date and normalized property costs for current and agreed holdings and property projects. For a more detailed description of the earnings capacity, please see page 18.

Events after the balance sheet date

Acquisition of major property portfolio from Profura

On May 5, the transaction of a property portfolio of 14 properties with an underlying property value of SEK 737 M was signed. The average lease length for the portfolio amounts to just over 13 years and has a net operating income of SEK 48 M. The acquisition will be financed through issued shares in Logistea, cash and bank financing.

Preferential rights issue

In April 2022, the preferential rights issue was completed with issue proceeds of SEK 350 M before issue costs. The subscription price was SEK 18 per ordinary share and a total of 19,428,133 ordinary shares were issued.

Calculated on only these two events and on other balances on the balance sheet date, the key figures below are affected as follows.

	Average remaining lease time, year	Net Asset Value per ordinary share, SEK/share	Equity to asset ratio, %
Key ratios on balance date (31 March 2022)	6.5	13.8	37.1
After preferential rights issue and transactions after balance date	7.8	15.1	41.1

Consolidated income statement in summary

MSEK	Not	Jan-Mar		Apr-Mar	Jan-Dec
		2022	2021	2021/2022	2021
Rental income		50	18	125	93
Property expenses		-17	-6	-39	-28
Net operating income	2	33	12	86	65
Central administration		-8	-5	-27	-24
Net financial income	3	-12	-4	-31	-23
Profit from property management		13	3	28	18
Changes in value, properties		179	3	554	378
Changes in value, derivatives		0	-	0	-
Profit before tax		192	6	583	396
Actual tax		0	-1	0	-1
Deferred tax		-37	-1	-114	-78
Result for the period for continuing operations		155	4	469	317
Profit for the period from distributed operations	4	-3	-4	-24	-24
Net profit for the period		152	0	445	293
Net profit for the period attributable to:					
Parent company's shareholders, continuing operations		155	4	467	317
Parent company's shareholders, distributed operations		-3	-4	-16	-16
Holding of non-controlling interests		-	-	-8	-8

Group summary statement of comprehensive income

MSEK	Not	Jan-Mar		Apr-Mar	Jan-Dec
		2022	2021	2021/2022	2021
Net profit for the period		152	0	443	293
<i>Items which can be recognized as profit for the period</i>					
Translation difference etc		0	-1	-4	-4
Comprehensive income for the period		152	-1	439	289
Other comprehensive income for the period attributable to:					
Parent company's shareholders, continuing operations		155	4	467	317
Parent company's shareholders, distributed operations		-3	-5	-20	-20
Holding of non-controlling interests		-	-	-8	-8
Earnings per share¹⁾					
Earnings per share, calculated on result for the period for continuing operations attributable parent company's shareholders, SEK		1.60	0.05	5.26	3.73
Earnings per share, calculated on result for the period attributable to parent company's shareholders, SEK		1.57	0.00	5.05	3.49
Number of outstanding shares, thousands					
Ordinary shares A and B at the end of the period		97,141	71,893	97,141	96,289
Average number of ordinary shares A and B		96,746	71,893	84,538	78,768

¹Earnings per ordinary share are adjusted retroactively for the bonus issue and reverse split in November 2021
Bridges between the layout of the income statement according to previous interim reports and current is reported in Note 1.



Performance analysis

Q1

Rental income

Rental income including rental supplements for the first quarter increased by 182 per cent compared with the same period last year and amounted to SEK 50 M (18) on the balance sheet date. The increase is mainly attributable to increased revenues mainly as a result of property acquisitions, increased additions and indexation of the leases.

The economic occupancy rate on the balance sheet date was 99.3 per cent (99.7) and the contracted rental value of the investment properties amounted to SEK 179 M (68), an increase of 163 per cent.

Property expenses

Property costs during the first quarter amounted to SEK 17 M (6). The costs consist mostly of property management and operation in the form of electricity, heating and water. The increase is attributable to the larger property portfolio as well as a slight increase in tariff-linked costs as a result of increased electricity and heating costs. Most of Logistea's property costs are charged to the tenants in the form of rental supplements.

Net operating income

Net operating income increased by 172 per cent and amounted to SEK 33 M (12). A specification of net operating income for the quarter can be found in Note 2.

Central administration

Costs for central administration, which relate to costs for Group Management and Group-wide functions, amounted to SEK 8 M (5) for the first quarter. The increase is attributable to the company's expansion, new hires and non-recurring items amounting to SEK 3 M.

Net financial income

Financial costs amounted to SEK 12 M (4). At the end of the period, the average interest rate was 3.1 per cent (2.8). As a result of property acquisitions, interest-bearing liabilities have increased to SEK 1,740 M (454) and the loan-to-value ratio has increased to 56.6 per cent (51.7). The interest coverage ratio has increased to 2.1 times (1.8) for the period. See further information on interest-bearing liabilities on page 12.

Profit from property management

Profit from property management increased to SEK 13 M (2) for the first quarter. The increase is largely attributable to the increased property portfolio.

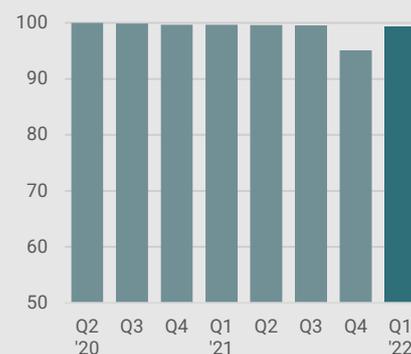
Result from property operations¹

Profit for the property operations amounted to SEK 155 M (4) for the period, where unrealized changes of the value of the property portfolio accounted for SEK 179 M (3) and deferred tax for SEK 37 M (1). More information on unrealized changes of values of properties can be found in Note 7.

Rental income and net operating income by quarter, MSEK



Economic occupancy rate per quarter, %



¹ Continuing operations after the fashion business has been distributed.



Consolidated statement of financial position in summary

MSEK	Not	31/03/2022	31/03/2021	31/12/2021
ASSETS				
Non-current assets				
Intangible assets		1	-	1
Investment properties	7	3,075	956	2,607
Right-of-use assets		9	6	2
Other tangible fixed assets		2	0	0
Other long-term receivables		1	2	1
Derivatives		1	-	-
Total non-current assets		3,089	964	2,611
Current assets				
Inventory		-	2	-
Current receivables		104	16	82
Cash and bank balances		72	64	218
Assets held for value transfer	6	-	112	-
Total current assets		176	194	300
TOTAL ASSETS		3,265	1,158	2,911
EQUITY AND LIABILITIES				
Equity attributable to parent company's shareholders		1,212	493	1,049
Total equity		1,212	493	1,049
Non-current liabilities				
Interest bearing debt		1,540	524	1,514
Leasing liabilities		7	1	-
Deferred tax		128	15	90
Derivatives		0	-	-
Total non-current liabilities		1,675	540	1,604
Current liabilities				
Interest bearing debt		272	34	172
Leasing liabilities		2	4	2
Other liabilities		104	44	84
Liabilities held for value transfer	6	-	43	-
Total current liabilities		378	125	258
TOTAL EQUITY AND LIABILITIES		3,265	1,158	2,911

Group statement of changes in equity in summary

MSEK	Jan-Mar		Jan-Dec
	2022	2021	2021
Equity at beginning of period	1,049	470	470
Comprehensive income for the period	152	-1	289
Emissions, net after issuance costs	11	24	317
Non-cash issue acquisition of MBRS Group	-	-	142
Dividend of holdings in MBRS Group	-	-	-177
Staff option program	-	-	8
Equity at end of period	1,212	493	1,049



Group cash flow statement in summary

SEK	Not	Jan-Mar		Jan-Dec
		2022	2021	Q 2021
Cash flow from operations				
Net operating income continuing operations		33	12	65
Central administration continuing operations		-8	-5	-24
Operating income from distributed operations	5	-3	-4	-24
Adjustments for non-cash items		0	2	11
Interest received		-	1	-
Interest paid		-11	-5	-17
Tax paid		-0	-3	-1
Cash flow before changes in working capital		11	-2	10
Cash flow from changes in working capital				
Increase (-)/decrease (+) of commodities		-	-6	-22
Increase (-)/decrease (+) of current assets		-20	-9	-36
Increase (+)/decrease (-) of current liabilities		7	-	43
Cash flow from operations		-2	-17	-5
Cash flow from investing activities				
Investments in current properties	7	-111	-7	-161
Acquisition of properties		-164	-10	-331
Other intangible and tangible assets, net		-2	-2	-1
Cash flow from investing activities		-277	-19	-493
Cash flow from financing activities				
Emissions, net after issuance costs		-2	-	38
Staff option program		-	-	8
New loans		149	88	1,256
Repayment of loans		-14	-5	-642
Repayment of leasing debt		-	-1	-2
Cash flow from financing activities		133	83	658
Increase/decrease of cash and cash equivalents				
Cash flow for the period		-146	47	160
Cash and cash equivalents at beginning of period		218	58	58
Cash and cash equivalents at end of period		72	105	218

Comment on the cash flow statement

Cash flow from operating activities before changes in working capital for the quarter amounted to SEK 11 M (-2), of which SEK -3 M (-4) is attributable to distributed operations. Property operations generated SEK 14 M (2) in cash flow for the quarter.

Logistea has invested SEK 164 M (10) in cash in acquisition of properties and during the period SEK 111 M (7) was invested in development of properties in Borås and Vaggeryd. At the end of the quarter, the Group had total cash and cash equivalents amounting to SEK 72 M (105).

Property portfolio

Q1

Logistea continues its growth and the realization of the vision of being the natural long-term partner to companies that demand sustainable and modern premises for warehousing, logistics and light industry. It is realized through the acquisition, development and management of real estate and land.

The operational target that the property value shall exceed SEK 15 B by the end of 2024 shall be made by:

- Acquire properties and buildable land in attractive locations in Sweden, and over time also in the rest of the Nordic region, suitable for warehousing, logistics and light industry.
- Continuously develop existing property portfolio as well as new construction of properties on own land.
- Prioritize a well-diversified customer base with financially stable tenants and long-term leases.
- Conduct a resource-efficient business, where digitalization and technology are enablers, and where environmental impact and social sustainability are taken into account in business decisions.

As of March 31, 2022, Logistea owned 45 properties (18) in 23 locations in Sweden. Total rental income during the first quarter amounted to SEK 50 M (18) and for the last 12 months to SEK 125 M. Total leasable area amounted to 369,409 square meters, including ongoing new and extension projects. The occupancy rate for the management properties at the end of the quarter was 99.3 per cent (99.7).

The total carrying value of the property portfolio on the balance sheet date amounted to SEK 3,075 M (956) On top of that, the remaining investments for project development and building extensions, which are planned to be completed within 12 months, amounts to SEK 119 M. After the balance date, Logistea has signed and acquired properties of a value of SEK 892 M.

During the first quarter, unrealised changes in value amounted to SEK 179 M (7). The change in value is mainly based on adjusted yield developments for investment properties, as well as increased rental income for investment properties and increased values from project development. The valuation yield for Logistea's investment properties at the end of the first quarter was 5.8 per cent (6.1). More information about value changes of properties can be found in note 7.

The reported amount of the properties is based both on external valuations by reputable valuation agencies and on internal valuations. As of the balance sheet date, 64 per cent of the properties have been valued externally and the remaining properties have been valued internally. More information about Logistea's valuations can be found in Note 10 in the Annual Report 2021.

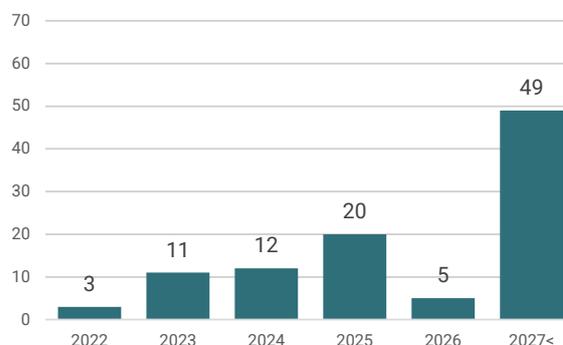
MSEK	Q1 2022	Q1 2021
Opening balance	2,607	887
Investment in existing properties	111	7
Acquisitions	178	59
Unrealized changes in value	179	3
Closing balance	3,075	956

Customers and leases

Regardless of its customers' operations and conditions, Logistea strives to offer sustainable and efficient premises in good business locations. Rental relationships in which both parties benefit and thrive are pursued.

Logistea focuses on acquiring properties that are leased to solid tenants on longer leases. As of March 31, 2022, the remaining length of all leases averaged 6.3 years. Logistea's tenants operate in a large number of industries, which spreads the risk of rent losses and vacancies.

Maturity structure rental value, %



Property portfolio as of balance sheet date 31 March 2022

Region	Leasable area, sqm	Property value, MSEK	Rental value, MSEK	NOI, MSEK	Building rights, sqm
Örebro	98,505	514	42	32	50,000
Jönköping	95,800	621	43	37	33,500
Gothenburg	92,714	960	63	53	33,000
Linköping	28,260	194	14	11	2,000
Öresund	22,910	286	16	15	13,000
Total	338,189	2,575	179	148	131,500
Project properties	31,220	500	20	18	169,000
Total	369,409	3,075	199	166	300,500

Of the total number of building rights, 42,000 sqm is held via a one-sided option.

During the quarter, the company acquired and closed four properties corresponding to approximately 24,255 sqm of rentable area and 63,000 sqm of building rights with a total property value of SEK 178 M.

To clarify the property portfolio, it is presented as follows¹:

Region Gothenburg – Borås, Falkenberg, Gothenburg, Härryda, Kungsbacka, Kungälv, Svenljunga, Partille, Tanum, Trollhättan, Vara, Varberg.

Region Jönköping – Gnosjö, Jönköping, Ljungby, Mullsjö, Vaggeryd.

Region Linköping – Kalmar, Motala and Mjölby.

Region North – Kramfors, Piteå, Timrå and Ånge

Region Örebro – Karlskoga and Kristinehamn

Region Öresund – Bromölla, Båstad, Kristianstad, Malmö and Olofstrom.

¹) The property portfolio is not monitored by region internally. The division is only a clarification.

Signed and closed property transactions after the balance sheet date

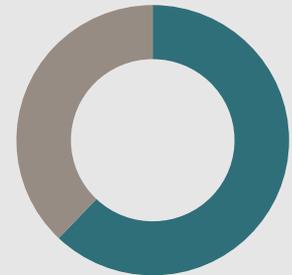
(until May 5th 2022)

Region	Leasable area, sqm	Property value, MSEK	Rental value, MSEK	NOI, MSEK	Building rights, sqm
Öresund	63,402	308	20	19	-
Gothenburg	62,116	444	32	28	-
North	16,759	67	11	11	4,500
Jönköping	11,240	73	5	4	60,000
Total	153,517	892	68	62	64,500

After the balance sheet date, until May 5, 2022, Logistea has

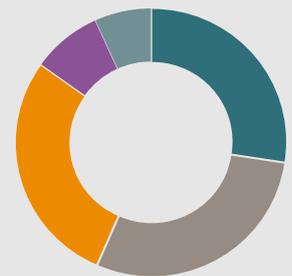
- Signed and closed a property with an underlying property value of SEK 85 M and a leasable area of approximately 22,600 sqm
- Signed and closed a property with an estimated investment amounting to approximately SEK 45.0 M, of which the land acquisition amounts to SEK 3.6 M
- Signed a property of 9,800 sqm with a property value of SEK 53.0 M
- Signed a land development property of 40,000 sqm (corresponding to 25,000 building rights) along the E4 in Ödeshög with a one-sided option to acquire additional 40,000 sqm land. Closing expected in Q2 2022
- Agreed on the acquisition of a property portfolio of SEK 745 M with a leasable area of 121,000 sqm and a rental value of SEK 50 M. Estimated closing in June 2022.

Leasable area by category
March 31, 2022, sqm



■ Warehouse/logistics ■ Light industrial

Leasable area by region
March 31, 2022, sqm



■ Gothenburg ■ Örebro
■ Jönköping ■ Linköping
■ Öresund

Project properties

Logistea is an active driving force in further developing the areas where the company has its properties. In order to create the greatest possible customer benefit, the company works continuously to develop, refine, modernize and customize the properties.

Borås (Viared). The project to build to approximately 9,000 sqm to the existing 8,700 sqm is progressing. Hyresgästen, e-commerce player Cellbes has started the installation of the automation solution "Autostore" and move in date is planned to be in the second quarter of 2022.

Vaggeryd Logistics Park. The logistics park is an extensive development area in an excellent logistics location south of Jönköping where rail connection is also included. The first phase, a state-of-the-art logistics property of approximately 13,500 square meters with a good signage location at the E4, has been completed, final approval has been received and tenants moved in at the beginning of the second quarter 2022.

Battery cell factory in Svenljunga. An early-stage project, with the potential to become one of the larger industrial projects in Sweden in the coming years, consists of the letter of intent that Logistea, together with Hansson Holding AB, signed with an international battery manufacturer at the end of 2021 regarding a lease agreement for 380,000 sqm of newly produced premises. At the same time, an associated exclusive land reservation agreement for one million square meters of land area was signed with Svenljunga Municipality.

Dry port in Båramo. Båramo Terminalen, a dry port connected by rail with the Port of Gothenburg, is one of the largest inland nodes in the shuttle system by rail to and from the Port of Gothenburg. Logistea's 100,000 sqm of land, of which 80,000 sqm is held via a unilateral option, at the Båramo combi terminal is part of the EU-established European rail corridor ScandMed.

Gothenburg. In 2022, construction on two project properties in Gothenburg is also intended to begin.

Ongoing project development

Region	Leasable area, sqm	Estimated rental value, MSEK	Estimated NOI, MSEK	Total investment, MSEK	Remaining investment, MSEK	Estimated completion, year	Building rights, sqm
Gothenburg	31,220	20	18	235	119	2022	-
Jönköping	-	-	-	-	-	-	169,000
Total	31,220	20	18	235	119		169,000

Information about project properties is based on assessments about the size, focus and scope of the projects. Furthermore, the information is based on assessments of future project costs and rental value. The assessments and assumptions should not be seen as a forecast. Assessments and assumptions involve uncertainties regarding the implementation, design and size of the projects, schedules, project costs and future rental value. Information about project properties is regularly reassessed and assessments and assumptions are adjusted as a result of ongoing projects being completed or added and conditions changing.



Vindan 1, Borås

Sustainability

Goals and strategy in accordance with Agenda 2030 and BREEAM

Logistea contributes to the UN's Agenda 2030 by supporting a sustainable society and protecting the environment, and since 2022 has been an approved member of the UN Global Compact. The UN's global goals where Logistea has the greatest opportunity to influence are:

- 7 Sustainable energy for all,
- 8 Good working conditions and economic growth,
- 9 Sustainable industry, innovations and infrastructure,
- 11 Sustainable cities and towns,
- 12 Sustainable consumption and production, and
- 13 Fight climate change.

Since 2022, Logistea has a sustainability manager who operationally develops the work within the sustainability goals in dialogue with the company's stakeholders. Logistea works actively to minimize the environmental impact of its operations by working resource-smart, energy-efficient and environmentally friendly, including through the installation of solar panels.

Sustainability goals

Logistea has quantifiable targets for energy consumption for all new constructions, and where possible, also for existing or additional acquired properties. The goals are:

- BREEAM Very good or higher or equivalent certification standard, or
- Energy Performance Certificate (EPC) A or B, or
- Energy consumption less than 20 per cent of the applicable national building regulation, or
- Reduce energy consumption by at least 30 per cent for major rebuilds.

50 per cent green funding

In 2021, Logistea established a green financial framework to finance and refinance green and energy-efficient buildings as well as investments in energy efficiency such as solar panels. The Green Finance Framework is established in accordance with the Green Bond Principles, designed by ICMA (International Capital Markets Association) and the Green Loan Principles, designed by the LMA (Loan Market Association). The framework is reviewed by ISS ESG, an independent third party. In 2021, Logistea issued SEK 500 M in senior unsecured bonds within the framework, which in total amounts to SEK 1,000 M. The company's green assets amounted to approximately SEK 715 M on the balance sheet date. On the balance sheet date, 30 per cent of the loan portfolio consisted of green finance.

Social responsibility

Since 2021, Logistea has been the main sponsor of the Gothenburg-based sports club Grunden Bois. The association welcomes anyone with intellectual disabilities who wants to participate in sports in football, floorball and gymnastics. With the sponsorship, Logistea wants to create the conditions for more young people and adults who want to play sports to do so. For more information about the association see also: www.grundenbois.com

In 2022, Logistea has provided financial support to send supplies and help those affected by Russia's invasion of Ukraine.

Q1

Sustainability framework

WE SUPPORT



Financing

Market outlook

The first quarter of the year has been marked by disruptions in the global economy. The war in Ukraine has pushed up energy, food and commodity prices, fueling already high inflation. The pandemic, which in the eyes of many is over, has gained new momentum in China, where multi-million cities have once again been under "lockdown", creating continued disruptions in global supply chains.

Swedish inflation for march was a record high of 6.1 per cent, which is the highest since the early 1990s.

The Swedish Riksbank has changed its view of inflation and there is a consensus that monetary policy tightening is required so that inflation, which is now the highest since the inflation measure was introduced, does not bite. On 28 April, the Swedish Riksbank decided to raise the repo rate and is expected to continue with increases throughout the year. An increase in the repo rate would mainly push up short-term market interest rates, where the 3-month Stibor has been more or less negative since 2015.

Interest-bearing liabilities

Logistea uses both bank financing and capital markets to finance acquisitions as well as new construction, refinement and optimization of the existing portfolio. Growth shall take place with a balanced leverage of a maximum of 60 per cent over time. During the quarter, Logistea subscribed for interest rate derivatives and the derivatives portfolio amounted to SEK 77 M (0) at the end of the period, of which SEK 39 M (0) consists of interest rate swaps and SEK 38 M (0) of interest rate caps. Derivative instruments are used to adjust the interest rate maturity structure of the loan portfolio

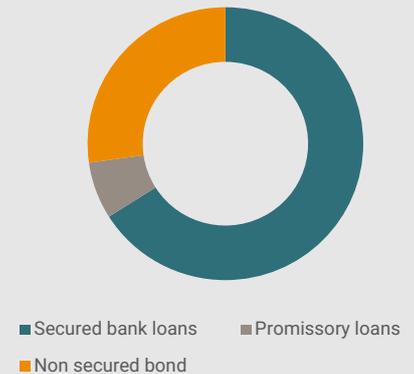
The company's interest-bearing net debt on the balance sheet date amounted to SEK 1,740 M (454), which corresponds to a loan-to-value ratio of 56.6 per cent (51.7) of the properties' market value. Gross interest-bearing debt was SEK 1,540 M (526) long-term and SEK 272 M (34) of current liabilities and consisted mainly of bank financing of SEK 1,212 M (475).

The average tied-up capital in the loan portfolio at the end of the quarter was 2.1 years and the fixed interest rate in the portfolio amounted to 0.4 years. At the end of the period, the average interest rate was 3.1 per cent (2.8).

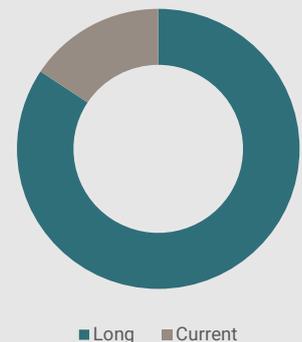
Net borrowing during the period January to March 2022 amounted to a total of SEK 138 M (84). The company has raised SEK 152 M (89) in new loans and amortized SEK 14 M (5) and reclassified two previously misclassified non-interest-bearing debts of SEK 11 M from interest-bearing debt to other debt.

Q1

Distribution of interest-bearing liabilities



Distribution of long- and short-term liabilities



Loan-to-value ratio per quarter, %



Logistea's share

Logistea is listed on Nasdaq Stockholm Mid Cap and had just under 15,000 shareholders at the end of the period. The ten single largest ownership spheres as of March 31, 2022 are listed in the table below.

Shareholders as of 31/03/2022

Each Class A share corresponds to one vote and one Class B share corresponds to one tenth of a vote.

Shareholder	LOGI A	LOGI B	Capital, %	Votes, %
Ilija Batljan directly and via legal entity	2,005,121	20,051,218	22.7	23.7
Dragfast AB	2,257,003	4,143,271	6.6	15.8
Stefan Hansson directly and via legal entity	512,324	5,802,436	6.5	6.5
M2 Capital Management AB	34,105	8,737,378	9.0	5.4
Phoenix Insurance Ltd.	-	7,057,188	7.3	4.2
Trenäs Förvaltning AB	394,182	2,941,828	3.4	4.1
Karlskoga Industrifastigheter AB	-	6,200,000	6.4	3.7
Handelsbanken Fonder	415,822	426,510	0.9	2.7
Avere Fastigheter AB	267,917	1,262,948	1.6	2.3
Kattvik Financial Services AB	42,466	3,465,696	3.6	2.3
Subtotal 10 largest shareholders	5,928,940	60,088,473	68.0	70.7
Other	2,044,720	29,078,533	32.0	29.3
Total	7,973,660	89,167,006	100.0	100.0

Source: Euroclear and shareholders

Issues related to acquisitions

Based on the Board of Directors' issue authorization from the Extraordinary General Meeting on October 22, 2021, Logistea has continued to pay in part property acquisitions with newly issued shares. This is expected to create shareholder value for existing shareholders. During the first quarter of 2022, 851,494 new Class B shares were issued in connection with acquisitions.

Preferential rights issue

In March 2022, Logistea announced the proposal to carry out a rights issue in order to support Logistea's growth strategy. The issue was fully guaranteed by a group of existing shareholders and was completed in April 2022. The subscription price was set at SEK 18 per ordinary share, regardless of share class, which corresponded to an issue proceeds of SEK 350 M before issue costs. Through the rights issue, Logistea's share capital increased by SEK 9.7 M through the issuance of 1,594,732 new Class A shares and 17,833,401 new Class B shares. The number of ordinary shares in the Company increased by 19,428,133 ordinary shares, which corresponds to a dilution of approximately 16.7 per cent of the total number of shares and 16.7 per cent of the total number of votes in Logistea.

Q1

Share information, March 31, 2022

Market cap	3.3 Mdkr
Market place	Nasdaq Stockholm, Mid Cap
LEI code	549300ZSB0ZCKM1SL747
Number of shareholders	14,639

Ordinary share class A	
Number of shares	7,973,660
Closing price	28.50 kr
ISIN	SE0017131329

Ordinary share class B	
Number of shares	89,167,006
Closing price	18.80 kr
ISIN	SE0017131337

The total outstanding shares as of the balance sheet date amount to 97,140,666 shares.



Key figures

Q1

	Jan-Mar		Apr-Mar	Jan-Dec
	2022	2021	2021/2022	2021
Property related				
Fair value investment properties, MSEK	3,075	956	3,075	2,607
Rental income, MSEK	50	18	125	93
Rental value, MSEK	179	68	179	154
Net operating income, MSEK	33	12	86	65
Economic occupancy rate, %	99.3	99.7	99.3	95.2
Operating margin, %	66.0	66.7	68.7	70.6
Adjusted operating margin, %	83.8	77.4	84.2	82.2
Number of investment properties	45	18	45	41
Financial				
Return on equity, %	54.8	3.3	55.0	38.5
Equity ratio, %	37.1	42.6	37.1	36.0
Interest bearing net debt, MSEK	1,740	494	1,740	1,458
Loan to value, %	56.6	51.7	56.6	55.9
Interest cover ratio, multiples	2.1	1.8	2.1	1.8
Average interest, %	3.1	2.8	3.1	3.1
Average tied-up capital, years	0.4	1.1	0.4	0.5
Share-related				
Profit from property mgmt per ordinary share A and B, SEK	0.1	0.0	0.3	0.2
Earnings per ordinary share A and B, SEK ¹⁾	1.6	0.0	5.0	3.7
NAV per ordinary share A and B, SEK	13.8	7.1	13.8	11.8
Equity per ordinary share A and B, SEK	12.5	6.9	12.5	10.9
Share price per ordinary share A, SEK	28.5	13.5	28.5	49.5
Share price per ordinary share B, SEK	18.8	-	18.8	33.3
Dividend per ordinary share A and B, SEK	-	-	-	-
EPRA				
EPRA NRV, SEK/share	13.8	7.1	13.8	11.8
EPRA NTA, SEK/share	12.7	6.6	12.7	10.9
EPRA NDV, SEK/share	12.5	6.4	12.5	10.9
EPRA EPS	0.1	0.0	0.3	0.2
Number of outstanding ordinary shares class A and B	97,141	71,893	97,141	96,289
Average number of outstanding ordinary shares	96,746	71,893	84,538	78,768

¹Earnings per ordinary share are adjusted retrospectively for the bonus issue and reverse split in November 2021

For definitions of key figures, see page 20. Reconciliation tables for calculating key figures are available on Logistea's website.



Notes

Q1

Not 1. Bridge of the income statement

Bridge for the comparison period January – March 2021

MSEK	Note	Arrangement according to previously published interim report	Reclassification of distributed operations	Reclassifications to new form of presentation for the income statement	According to a new form of presentation for the income statement
Net income		55	-55	-	-
Rental income		16	-	2	18
Other operating income		2	-	-2	-
Total income		73	-55	-	-
Commodities		-22	22	-	-
Property costs	A	-	-	-6	-6
Net operating income		-	-	12	12
Other external costs		-31	20	11	-
Staff costs		-14	14	0	-
Depreciation		-2	2	-	-
Other operating costs		-1	1	-	-
Central administration	B	-	-	-5	-5
Operating profit		3	-3	-	-
Changes in value investment properties		3	-	-3	-
Interest income		0	0	-	-
Interest costs		-4	0	4	-
Net financial income		-	-	-4	-4
Profit after financial items		2	-2	-	-
		-	-	3	3
Changes in value investment properties		-	-	3	3
Profit before tax		-	-	6	6
Tax		-2	-	2	-
Current tax		-	-	-1	-1
Deferred tax		-	-	-1	-1
Result attributable to parent company's shareholders		0	4	-4	-
Result for the period for continuing operations		-	-	4	4
Profit for the period from distributed operations		-	-4	-	-4
Result for the period		-	-	0	0

Explanations for the bridges

The bridge has been prepared when the layout of the income statement has been adjusted as of the interim report for Q3 2021. The bridge shows how the new set-up form is connected to the previous set-up form.

A) Property costs have been reported in previous layout both under merchandise and under other external costs.

B) Central administration includes personnel costs, as well as part of other external costs from the previous layout.



Not 2. Net operating income

MSEK	Q1 2022	Q1 2021
Rental income	50	18
<i>Whereof rental supplements</i>	11	2
Property costs	-17	-6
Net operating income	33	12
Operating margin	66%	67%
Adjusted operating margin	84%	77%

The table above shows how much of the total rental income constitutes of rental supplements. Adjusted operating margin is net operating income through rental income excluding the rental supplements and shows how much of the property costs are re-invoiced to the tenants.

Not 3. Net financial income

MSEK	Q1 2022	Q1 2021
Interest income	0.0	0.0
Interest costs	-10.3	-4.4
Interest costs IFRS 16	0.0	0.0
Financing costs	-1.4	0.0
Net financial income	-11.7	-4.4

Not 4. Profit and loss for distributed operations for the period

MSEK	Jan-Mar		Jan-Dec
	2022	2021	2021
Net income	-	55	195
Other operating income	-	-	1
Total income	-	55	196
Commodities	-	-22	-72
Other external costs	-	-20	-88
Staff costs	-3	-14	-44
Depreciation	-	-2	-16
Other operating costs	-	-1	-
Operating profit	-3	-4	-24
Financial costs	-	-	-
Profit before tax	-3	-4	-24
Tax	-	-	-
Profit for the period from distributed operations	-3	-4	-24

Not 5. Cash flow statement for the period for distributed operations

MSEK	Jan-Mar		Jan-Dec
	2022	2021	2021
Cash flow from operating activities	-3	-4	-24
Cash flow from investing activities	-	-	-
Cash flow from financing activities	-	-	-
Cash flow for the period from distributed operations	-3	-4	-24

Not 6. Balance sheet for the period for distributed operations

MSEK	31/03/2021
Intangible assets	16
Non-current assets	1
Financial assets	0
Inventory	33
Accounts receivable	14
Current receivables	7
Cash and bank balances	41
Assets held for dividend	112
Current liabilities	43
Liabilities held for dividend	43

For more information about distributed operations, see Accounting policies.

Not 7. Investment properties

Property holdings increased by SEK 468 M (69) in the first quarter of 2022, of which SEK 179 M (3) consisted of unrealised changes in value. The change in value is mainly based on adjusted yield requirements for investment properties, as well as increased rental income for investment properties and increased values from project operations. The average valuation returns for the Group's investment properties, excluding project properties, on the balance sheet date amounted to 5.8 per cent (6.1).

All acquisitions made during the year are classified as asset acquisitions.

MSEK	Q1 2022	Q1 2021
Opening balance	2,607	887
Investment in existing properties	111	7
Acquisitions	178	59
Unrealized changes in value	179	3
Closing balance	3,075	956

Parent company

Q1

Income statement in summary

MSEK	Jan-Mar		Apr-Mar	Jan-Dec
	2022	2021	2021/2022	2021
Intra-group revenue	16	0	27	27
Administration costs	-15	-3	-28	-32
Operating profit (loss)	1	-3	-1	-5
Profit from financial items	-5	-4	116	115
Year-end appropriations	-	0	5	5
Profit before tax	-4	-4	120	115
Tax	-	0	0	0
Net profit for the period	-4	-4	120	115

Balance sheet in summary

MSEK	31/03/2022	31/03/2021	31/12/2021
ASSETS			
Intangible assets	1	-	1
Tangible assets	1	-	0
Shares in group companies	817	363	791
Receivables from group companies	1,453	401	1,322
Deferred tax assets	6	6	6
Other receivables	14	7	22
Cash and cash equivalents	53	48	150
Total assets	2,345	826	2,292
EQUITY AND LIABILITIES			
Equity	669	411	662
Interest bearing liabilities	1,506	352	1,529
Liabilities to group companies	135	16	71
Other liabilities	35	47	30
Total equity and liabilities	2,345	826	2,292



Current earnings capacity

Q1

MSEK	31/12/2020	31/03/2021	30/06/2021	30/09/2021	31/12/2021	31/03/2022	05/05/2022
Income investment properties	60	68	85	87	155	179	242
Income project properties	-	-	-	34	34	20	25
Property costs	-18	-19	-21	-22	-31	-33	-39
Net operating income	42	49	64	99	158	166	228
Central administration	-6	-7	-10	-15	-20	-26	-28
Net finance costs	-10	-12	-20	-23	-53	-55	-60
Profit before tax	26	30	34	61	85	85	140

The table above presents earning capacity for the Group on a 12-month basis.

Since the chart is not equivalent to a forecast, but intends to reflect a normal year, the actual outcome may differ due to both decisions that affect the outcome positively and negatively in relation to normal years and unforeseen events. The presented earning capacity does not contain an assessment of rent, vacancy or interest rate changes and only aims to make income and expenses visible given, for example, capital structure and organization at a given time.

Logistea's income statement is also affected by changes in value and changes in the property portfolio. None of this has been taken into account in the current earning capacity. Net operating data is based on lease agreements contracted as of the balance sheet date and normalized property costs for the current portfolio. In addition, the rental value, property costs and forecasted financial costs are included for ongoing projects that are planned to be completed within a 12-month period and where leases have been signed.

Other information

Seasonal variations

The leases in the company's property portfolio are approximately 80 per cent so-called triple-net agreements, which means that the tenant is responsible for the ongoing media costs, such as electricity, heating, water and sewage. In cases where the property owner is responsible for media costs, seasonal variations for property costs may occur, where, for example, costs for electricity and heating are higher during the colder months of the year.

Employees

The number of employees in the Group at the end of the period amounted to a total of 12 employees (2). In the corresponding period for 2020, only employees attributable to continuing operations, i.e. real estate operations, are listed. The average number of employees in the first quarter was 10 (2).

Dividend

The Board of Directors' objective is to annually propose to the Annual General Meeting to resolve on a dividend corresponding to at least 30 per cent of the company's profits. The Board of Directors intends to prioritize growth over dividends over the next few years, which may result in low or

non-payment of dividends to common shares. No dividend is proposed to the Annual General Meeting for the financial year 2021.

Significant events after the end of the balance sheet date

The rights issue was completed on April 12 with 38.6 per cent oversubscription.

19 properties with a value of SEK 892 million have been agreed on acquisitions after the end of the quarter. Leasable area amounts to 153,500 sqm and the rental value to SEK 68 M. The acquisition on 5 May 2022 of a portfolio of 14 properties with a value of SEK 745 M constitutes the majority of this.

After the balance sheet date, Logistea has entered into an agreement to issue a total of 3,785,258 ordinary B shares in connection with acquisitions with an average price of SEK 33 per share to a total value of SEK 125 M.

Auditor's review

The interim report has not been subject to review by the company's auditor.



Accounting principles

Accounting principles

Logistea follows the IFRS standards adopted by the EU. Accounting principles and calculation methods remained unchanged compared with the annual report 2021. This interim report is prepared in accordance with IAS 34 Interim Reporting and the Annual Accounts Act. Information in accordance with IAS 34 Interim Financial Reporting is provided both in the notes and elsewhere in the report. The comparative figure for profit and loss items in text is for the corresponding period last year. Comparative figures for balance sheet items in text are from 2021.

New layout for the income statement

In the interim report for the period January – September 2021, the layout of the income statement and the report on comprehensive income were changed. Bridges for transition from the layout form in previously published interim reports to the new layout form can be found in Note 1.

Distribution of shares in MBRS Group AB

The fashion business, which was conducted in the previously wholly owned subsidiaries Odd Molly Sverige AB and Used By International AB, was divested on July 1, 2021 to MBRS Group AB (MBRS), previously We aRe Spin Dye AB. In connection with the transaction, Logistea received newly issued shares corresponding to approximately 53 per cent of the number of outstanding shares in MBRS. MBRS was part of the Logistea Group until 22 October 2021 when it was decided to distribute the shares to Logistea's shareholders in a so-called Lex Asea dividend. Profit and the balances from the fashion business and MBRS is referred to in the income statement and the balance sheet as from distributed operations, see Note 4 respectively Note 6. Finally, cash flow for the fashion business and MBRS is also broken out and reported as cash flow from distributed operations, see Note 5.

Valuation of the real estate portfolio

Acquired investment properties are initially recognized at acquisition cost, which includes directly attributable costs to the acquisition. Investment properties are then recognised at fair value according to level three of the fair value hierarchy with changes in value in the income statement. The Group's properties consist primarily of logistics properties, which have a similar risk profile and valuation methodology. The average rental period for all contracts on the balance sheet date was 6.3 years (6.2). The essential variables, which are decisive for the calculated fair value, are the discount rate and rental value. Other important variables are long-term net operating income, rent levels, vacancy levels and geographical location. The basis for determining the yield requirement is, among other things, the market's risk rate for real estate investments, at any given time. This is based on a number of factors such as market interest rates, leverage ratios, inflation expectations and return requirements for invested capital. Property-specific conditions also affect the yield requirement. The property's net operating income is the property's net operating income in relation to the fair value. As the discount rate, the fixed yield rate with the addition of annual inflation is used. The level of annual future inflation is estimated at 2 per cent. More information about Logistea's valuations can be found in Note 10 in the Annual Report 2021.

The fair value of the Group's building rights is based on local price analyses from transactions in the area with similar building rights. Costs incurred for earthworks, for example, are added to the fair value.

Risks and risk management

Through its operations, the Group is exposed to risks and uncertainties. A description of the Group's risks can be found on pages 32-37 and in Note 17 of the Annual Report for 2021. The Annual Report 2021 can be found on www.logistea.se.

Alternative key ratios & definitions

Q1

Adjusted operating margin

Net operating income as a percentage of basic rental income.

Average fixed interest rate

Average remaining maturity of the interest rate for interest-bearing liabilities.

Average interest rate

Average interest rate for interest-bearing liabilities.

Average number of ordinary shares outstanding

Average number of shares outstanding during the period.

Building rights

Assessed buildable gross area, in square meters.

Central administration

Central administrative costs refer to costs for group management and group-wide functions.

Earnings per ordinary share

Profit after tax in relation to the average number of ordinary shares outstanding.

Economic occupancy rate

Annual contract value divided by rental value excluding project properties

EPRA NRV

Equity¹ with the repossession of derivatives and deferred tax.

EPRA NTA

EPRA NRV less intangible assets and assessed fair value of deferred tax.

EPRA NDV

EPRA NDV with the repossession of intangible assets, derivatives and deferred tax in full.

EPRA EPS

Profit from property management less current tax per ordinary share.

Equity per ordinary share

Equity¹ in relation to the number of ordinary shares outstanding.

Equity ratio

Equity as a percentage of the balance sheet total.

Interest-bearing net debt

Interest-bearing liabilities less interest-bearing assets and cash and cash equivalents.

Interest coverage ratio

Profit from property management excluding interest costs and income (excl. leasehold) divided by interest costs and income (excl. leasehold).

Investment properties

Properties under ongoing management.

Loan-to-value ratio

Interest-bearing liabilities after deduction of cash and cash equivalents in relation to the fair value of the properties.

Net asset value (NAV) per ordinary share

Equity¹ with the reverse of deferred tax liabilities in relation to the number of ordinary shares outstanding.

Number of investment properties

The number of investment properties in the balance sheet includes properties under day-to-day management as well as project properties.

Number of ordinary shares outstanding

Number of ordinary shares outstanding at the balance sheet date.

Operating margin

Net operating income as a percentage of revenue

Profit from property management per ordinary share

Profit from property management in relation to the average number of ordinary shares outstanding.

Project properties

Properties where ongoing renovation or extension affects the landlord more than 40 per cent.

Return on equity

Profit after tax on an annual basis divided by the average of opening and closing equity¹.

Rental value

Annual contract value with supplements for assessed market rent for vacant premises.

Share price per ordinary share

Share price on balance date.

Unrealised changes in value

Change in fair value excluding acquisitions, divestments and investments.

Yield

Net operating income in relation to the investment property's fair value (excluding project properties).

Logistea applies the European Securities and Markets Authority's (ESMA) guidelines on Alternative Key Ratios. The guidelines aim to make alternative key ratios in financial statements more understandable, reliable and comparable, thereby promoting their usefulness. According to these guidelines, an alternative key ratio refers to financial measures of historical or future earnings performance, financial position, financial performance or cash flows that are not defined or specified in the applicable financial reporting rules; IFRS and the Annual Accounts Act

¹Equity attributable to shareholders of the parent company



Signatures of the report

Q1

The Board of Directors and the CEO ensure that the Interim Report provides a true and fair view of the parent company's and the Group's operations, position and results and describes significant risks and uncertainties that the Parent Company and the companies that are part of the Group. The Interim Report has not been reviewed by the company's auditor.

Stockholm 6 May, 2022

Logistea AB (publ)
Corporate ID 556627-6241

Patrik Tillman
Chairman of the Board

Bengt Kjell
Vice Chairman of the Board

Sanja Batljan
Board member

Johan Mark
Board member

Fredrik Palm
Board member

Caroline Thagesson
Board member

Niklas Zuckerman
CEO



Logistea in brief

Logistea AB (publ) is a Swedish real estate company with a vision of being the natural long-term partner of companies that demand sustainable and modern premises for warehouses, logistics and light industry. The vision is realized through the company's business concept to acquire, develop and manage properties and land. The company's shares are listed on Nasdaq Stockholm Mid-Cap with the tickers LOGI A and LOGI B.

Operational objectives

- Property value exceeding BSEK 15 at the end of 2024.
- Annually complete at least 25,000 square meters of new lettable space.
- 50 per cent of the property portfolio's operations will be digitized by the end of 2026.
- 50 per cent of the loan portfolio is green financing in the year to the end of 2026.

Financial targets and risk limitations

- Profit from property management per ordinary share shall increase by at least 10 per cent per year on average over a five-year period.
- Net asset value per ordinary share shall increase by at least 12 per cent per year on average over a five-year period.
- The loan-to-value ratio shall amount to a maximum of 60 per cent in the long term.
- The interest-drawing ratio shall exceed 1.8 times.

Dividend policy

The Board of Directors' ambition is to annually propose to the Annual General Meeting to resolve on dividends corresponding to at least 30 per cent of the company's profit. The Board intends to prioritize growth over dividends in the next few years, which may result in low or non-dividends to ordinary shares.

Financial calendar

Annual General Meeting	2022-05-06
Interim Report Q2 2022	2022-07-15
Interim Report Q3 2022	2022-10-26
Year-end Report 2022	2023-02-17

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This information is information that Logistea AB (publ) is obliged to make public pursuant to the EU Market Abuse Regulation. The information was submitted for publication, through the agency of the contact persons set out above, at 07:30 CET on March 6, 2022.

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LOGISTEA