

Interim Report

January – June 2015

109.1 Million

(96.7)

Net sales

3.4 Million

(0.1)

EBITA (before NRI)

SECOND QUARTER 2015

- Sales increased by 13% compared with the same period last year. Weather conditions during the second quarter and a mild winter limited water-related damages. An increase in fire and large loss damages together with last year's gain of large contracts in the UK compensated the low growth in water damages. Backlog in the Group is 20% higher than last year, excluding the New York City Housing Authority (NYCHA) project. Order intake late in the period was weak following the lack of weather events.
- Operating profit before amortisation and non-recurring items (EBITA before NRI) amounted to EUR 3.4 million (0.1). The development is attributable to improvement programs and new management in several markets. The operating result in Europe accounts for the entire profit increase. North America was influenced in 2014 by the Polar Vortex which increased the number of freeze damages.
- Country presidents in Germany and the US were replaced during the quarter, and both countries initiated restructuring programs. The reduction of central administration has been completed in Germany. In the US, the PDR (property damage restoration) business has been discontinued in order to focus exclusively on the TCS (temporary climate solutions) business. The management team at Polygon's head-office in Stockholm has been reduced from five to three persons. Restructuring charges, mainly attributable to Germany and the US, amounted to EUR 4.5 million. Last year the restructuring charges amounted to EUR 3.7 million.
- Operating loss (EBITA) amounted to EUR 1.1 million (3.6).
- New appointments to the Board of Directors in June are Lars-Ove Håkansson, previously CEO and Chairman of Skanska, and Petter Darin from Triton Advisers (Sweden) AB. At the same time Torbjörn Torell stepped down from the Board.

JANUARY – JUNE 2015

- Sales increased by 9% compared with the same period last year, partly due to favourable order intake in late 2014.
- Operating profit before amortisation and non-recurring items (EBITA before NRI) amounted to EUR 7.8 million (4.0). The profit increase is attributable to leverage on the sales growth.

Amounts in brackets in this report refer to the corresponding period in the previous year.

GROUP KEY FIGURES

EUR million	Q2		Q1-2		12 Months	
	2015	2014	2015	2014	2014	LTM
Sales	109.1	96.7	220.1	201.2	419.1	438.0
EBITDA	1.2	-1.6	7.9	3.8	13.4	17.6
EBITA	-1.1	-3.6	3.3	-0.5	4.6	8.4
EBITA %	-0.9	-3.7	1.5	-0.2	1.1	1.9
EBITA before NRI	3.4	0.1	7.8	4.0	11.8	15.5
EBITA before NRI %	3.1	0.1	3.5	2.0	2.8	3.5
Earnings per share (EUR)	-0.95	-1.68	-0.30	-1.71	-1.90	-1.71
Cash flow from operating activities	5.0	-1.4	5.7	-0.1	10.0	15.8
Net debt	107.2	99.7	107.2	99.7	101.7	107.2
Full time employees	2,743	2,785	2,743	2,785	2,840	2,799

Comments from the CEO

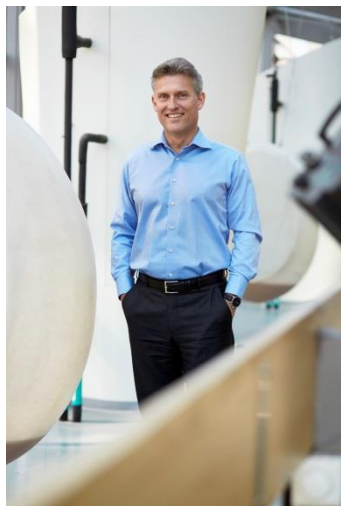
Q2 is clearly a step in the right direction

In the first quarter report I stated, “We are better prepared to meet the challenges in Q2 which historically is our weakest quarter [...] the improvement actions should give positive effects both on the project margin side as on the cost side.” I am pleased that my forecast was accurate, especially since the improvement is within our operations, as we have not been helped by weather events. Backlog at the start of 2015 was improved after good sales efforts in late 2014.

In the second quarter alone we improved our operative EBITA level from last year at zero to 3.1 percent, and for the whole period we improved the operating result by almost 100 percent. All countries except the US have improved their results in the first half of the year compared with 2014.

The restructuring program initiated in Germany, where the first step was to cut the central costs, has now been completed by the move of the head office. We could see improvement in the cost structure already in the second quarter. The refocus in the US has started with a cost cut which, as in Germany, has rendered favourable effects in the second quarter. The organisation and management can now focus entirely on sharpening our offer in the temporary climate solution (TCS) area.

Last but not least, I see improvements in all countries where we changed the country president last year. The current management teams, together with a strong focus on a set of strategic initiatives, will help us on the journey to improve our profitability. We need to grow the business, improve our efficiency in operations and get leverage from a more optimised indirect structure.



Evert Jan Jansen,
President and CEO

Short-term outlook

New framework agreements and effects from productivity measurements should partly compensate for the weak order intake towards the end of the second quarter. Indirect costs are reduced after the restructuring projects in the US and Germany. We foresee limited restructuring in the second half of the year.

Market development

There are several market trends in the property damage restoration market that benefit larger players like Polygon such as: the centralisation of procurement, the customer preference for one-stop-shops and the more complex requirements for front-end IT systems. Global warming is gradually increasing rainfall levels and extreme weather, which consequently will increase water damages.

Net sales and profit for the second quarter 2015

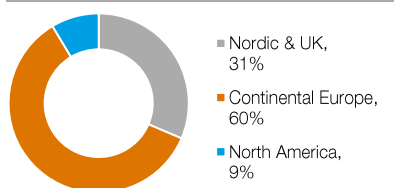
Consolidated sales amounted to EUR 109.1 million, an increase of 13% compared with the same quarter last year. Organic growth, excluding currency and acquisition effects, amounted to 9%. Growth in Europe is 13% while North America is 14% below last year's sales in local currency. Due to the lack of weather events and a mild winter, the sales mix was unfavourable with an increasing share of non-water related jobs, which have lower margins. Order backlog for the Group increased by 20%, excluding the NYCHA project, which influenced the second quarter 2014.

Operating profit for the Group before amortisation and non-recurring items (EBITA before NRI) amounted to EUR 3.4 million (0.1). Earnings have been positively impacted in most markets compared with last year as an effect of restructuring programs from previous periods, in addition to restructuring initiated and executed during the second quarter this year. In Germany and the US, programs have been completed to reduce indirect spending. Both programs had positive effects in the second quarter.

Restructuring costs in the second quarter increased to EUR 4.5 million due to the cost reductions in Germany and the US. The restructuring is mainly redundancy costs. Operating loss (EBITA) amounted to EUR 1.1 million (3.6).

The work in the NYCHA project in the US was finished in late April. Administrative closing of the project is ongoing.

Net financial expenses for the period amounted to EUR 2.8 million (4.8) including a currency loss of EUR 0.9 million. Last year the currency differences were close to zero and some extra costs occurred due to the bond financing. Loss before tax for the period amounted to EUR 5.2 million (9.7), and net loss was EUR 5.3 million (9.4).



Net sales and profit for the first half year 2015

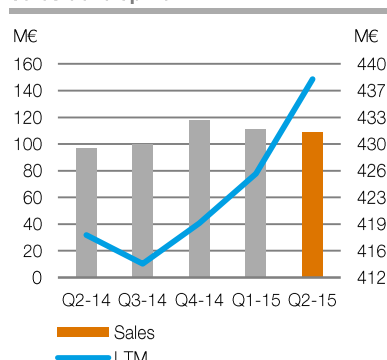
Consolidated sales amounted to EUR 220.1 million, an increase of 9% compared to the same period last year. Organic growth excluding currency and acquisition effects amounted to 8%. Europe shows a growth of 10% while North America is in local currency 7% below last year's sales, mostly due to a decrease in Canada. 2014 was boosted in the US by the Polar Vortex. Due to the lack of events and a mild winter, the sales mix was unfavourable with an increasing share of non-water related jobs with lower margins.

Operating profit for the Group before amortisation and non-recurring items (EBITA before NRI) amounted to EUR 7.8 million (4.0), an improvement of 95% compared with the same period last year. The improvement is mainly attributable to the second quarter. The first quarter was satisfactory in 2014 while second quarter was weak. Effects from previous restructuring and new actions explain the improved result. All markets except the US have improved the results compared with last year.

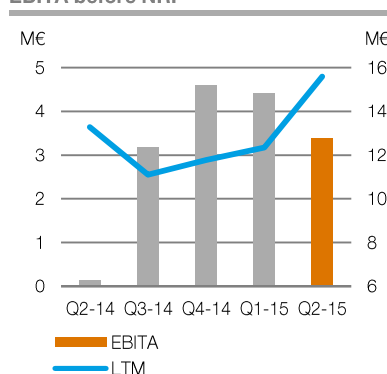
Restructuring cost was EUR 4.5 million (4.5) of which nearly all was booked in the second quarter. Operating profit (EBITA) amounted to EUR 3.3 million (loss 0.5).

Net financial expenses for the period amounted to EUR 2.0 million (6.7) including currency gains of EUR 1.8 million (0.4). Loss before tax for the period amounted to EUR 1.5 million (10.0), and net loss was EUR 1.6 million (9.5).

Sales development



EBITA before NRI



Cash flow and financing

Cash flow from operating activities during the second quarter of 2015 amounted to EUR 5.0 million (neg: 1.4) and cash flow before financing activities amounted to EUR 2.2 million (neg: 3.8). Due to the NYCHA project and work in progress, as part of the high business activity late in the quarter, working capital has increased since year-end.

Total interest-bearing net debt amounted to EUR 107.2 million (December 2014: 101.7).

Equity amounted to EUR 40.2 million (December 2014: 42.4).

The Group's liquidity buffer amounted to EUR 26.5 million (December 2014: 31.9), comprising cash and cash equivalents of EUR 16.5 million (December 2014: 21.5) and unutilised contracted loan commitments of EUR 10.0 million. (December 2014: 10.4)

Capital expenditure

Capital expenditure during the second quarter of 2015 amounted to EUR 2.8 million (2.4).

Parent company

The consolidated figures in the report are presented at the consolidated level of Polygon AB. The Parent Company, Polygon AB (corporate registration number 556816-5855), directly and indirectly holds 100% of the shares in all subsidiaries in the Group, except for the company in Denmark of which the non-controlled interest is 24.2% Net income for Polygon AB for the second quarter amounted to a profit of EUR 39,000 (1.2 million).

Most significant risks and uncertainty factors

Around 75% of Polygons business is property damage control following a seasonal pattern of predictable demand. The remaining 25% is related to more extreme and less predictable events caused by weather and fire. The frequency of property damage can vary depending on circumstances beyond Polygon's control, the outdoor temperature and weather. Since part of Polygon's cost structure is fixed, the proceeds of the operations are to some extent unpredictable and vary from time to time.

Polygon is to a large extent dependent on its key customers, the insurance companies, and must maintain mutually beneficial relationships with them to compete effectively. Our top-ten customers represent about 30% of Polygon's sales, with the newest customer on the top-ten list having a seven-year relationship.

For further elaboration of the Group's risk and uncertainty factors, please refer to the 2014 Annual Report.

Polygon's view is that there have not been any significant changes during the reporting period with regards to risks and factors of uncertainty that were presented in the Annual Report.

Related-party transactions

The Group is under the controlling influence of Polygon Holding AB, the Parent Company of Polygon AB. Polygon Holding AB is under the controlling influence of MuHa No2 LuxCo S.á.r.l. There are no material transactions with companies in which MuHa No2 LuxCo S.á.r.l has significant or controlling influence.

Accounting policies

The interim report for the Group has been prepared in accordance with IAS 34 Interim Reporting. The interim report for the Parent Company has been prepared in accordance with the Swedish Annual Accounts Act.

The Group applies the International Financial Reporting Standards (IFRS) as adopted by the EU, and the Swedish Annual Accounts Act.

The accounting policies applied in this interim report is the same as those applied in the consolidated annual accounts for 2014. More specified accounting policies can be found on page 10-16 in the Annual Report for 2014.

A number of standards and changes of standards are in effect from January 1, 2015. Polygon does not intend to apply them beforehand and the overall assessment is that they will have no major impact on the Group's result or position.

The term "IFRS" used in this document comprises the application of IAS and IFRS as well as the interpretation of these standards published by IASB's Standards Interpretation Committee (SIC) and International Reporting Interpretations Committee (IFRIC).

The undersigned assures that this interim report gives a true and valid overview of the Parent Company and the Group's business, position and results, describing essential risk and uncertainty factors that the Parent Company and its subsidiaries face.

Stockholm, 14 August 2015

Evert Jan Jansen
President and CEO

Segment Reporting

Segment information is presented based on the company management's perspective, and operating segments are identified based on the internal reporting to Polygon's chief operating decision maker.

EUR thousands	Q2		Q1-2		Full Year
	2015	2014	2015	2014	2014
Sales of services					
Nordic & UK	33,522	31,124	69,147	63,611	133,213
Continental Europe	67,365	57,845	132,108	120,011	248,119
North America	8,220	7,788	18,848	17,695	37,955
Intercompany sales	-33	-98	-37	-158	-181
Total	109,074	96,659	220,066	201,159	419,106
Operating income before NRI					
Nordic & UK	757	-437	1,916	503	4,539
Continental Europe	170	-1,086	1,065	-1,256	426
North America	67	-124	142	340	-2,273
Shared	991	423	1,891	1,914	3,342
Non-recurring items (NRI)	-4,480	-3,763	-4,523	-4,738	-7,131
Operating income	-2,495	-4,987	491	-3,237	-1,097
Net financial items	-2,755	-4,750	-1,975	-6,726	-11,525
Income after financial items	-5,250	-9,737	-1,484	-9,963	-12,622

Consolidated Income Statement

EUR thousands	Q2		Q1-2		Full Year
	2015	2014	2015	2014	2014
Sales of services	109 074	96 659	220 066	201 159	419 106
Cost of sales	-84 646	-74 510	-168 554	-153 664	-319 502
Gross profit	24 428	22 149	51 512	47 495	99 604
Selling and distribution cost	-22 154	-23 113	-45 892	-45 712	-92 424
Other operating income	-79	119	-130	268	1 785
Other operating costs	-4 690	-4 142	-4 999	-5 288	-10 062
Operating income	-2 495	-4 987	491	-3 237	-1 097
Finance income	54	16	70	37	238
Finance cost	-2 809	-4 766	-2 045	-6 763	-11 763
Income before tax	-5 250	-9 737	-1 484	-9 963	-12 622
Income taxes	-50	353	-152	433	2 100
Net income	-5 300	-9 384	-1 636	-9 530	-10 522

Consolidated Statement of Comprehensive Income

EUR thousands	Q2		Q1-2		Full Year
	2015	2014	2015	2014	2014
Net income for the period	-5,300	-9,384	-1,636	-9,530	-10,522
Comprehensive income					
Items that can not be reclassified to profit or loss					
Actuarial gains and losses on defined benefit plans	-	-	-	-	-1,989
Tax	-	-	-	-	473
Items that later can be reclassified to profit or loss					
Cash flow hedges	-	-	-	-	480
Exchange differences on transactions of foreign operations	185	182	-352	16	-113
Tax	-	-	-	-	263
Total comprehensive income, net of tax	-5,115	-9,202	-1,988	-9,514	-11,408
Net income attributable to:					
Owners of the company	-5,341	-9,404	-1,707	-9,570	-10,657
Non-controlling interest	41	20	71	40	135
Total	-5,300	-9,384	-1,636	-9,530	-10,522
Total comprehensive income attributable to:					
Owners of the company	-5,156	-9,222	-2,059	-9,534	-11,543
Non-controlling interest	41	20	71	20	135
Total	-5,115	-9,202	-1,988	-9,514	-11,408
Number of shares	5,600	5,600	5,600	5,600	5,600
Net income per share (EUR)	-0.95	-1.68	-0.30	-1.71	-1.90

Financial Ratios

EUR thousands	Q2		Q1-2		Full Year
	2015	2014	2015	2014	2014
Operating income before depreciation (EBITDA)	1,226	-1,559	7,882	3,764	13,443
Depreciation	-2,329	-2,046	-4,604	-4,236	-8,794
Operating income before amortization (EBITA)	-1,103	-3,605	3,278	-472	4,649
Amortization	-1,392	-1,382	-2,787	-2,765	-5,746
Operating income (EBIT)	-2,495	-4,987	491	-3,237	-1,097
Operating margin %	-2.3	-5.2	0.2	-1.6	-0.3

Consolidated Balance Sheet

EUR thousands	30 Jun, 2015	30 Jun, 2014	31 Dec, 2014
ASSETS			
Non-current assets			
Intangible assets	157,606	155,824	156,360
Property, plant and equipment	27,317	25,524	27,103
Deferred tax assets	23,021	20,180	22,777
Total non-current assets	207,944	201,528	206,240
Current assets			
Work in progress	12,543	12,944	16,498
Receivables	70,728	61,993	70,391
Receivables from parent company	72	-	71
Prepaid expenses	6,014	4,964	4,068
Cash and cash equivalents	16,542	23,024	21,509
Total current assets	105,899	102,925	112,537
TOTAL ASSETS	313,843	304,453	318,777
EQUITY AND LIABILITIES			
Equity			
Issued capital	58	58	58
Other contributed capital	6,771	6,771	6,771
Other capital reserves	-619	-711	-267
Retained earnings	33,082	37,275	34,789
Equity attributable to owners of the parent company	39,292	43,393	41,351
Non-controlling interests	938	999	1,094
Total equity	40,230	44,392	42,445
Non-current liabilities			
Provisions	6,108	5,328	5,853
Deferred tax liabilities	23,714	24,525	23,921
Long-term interest-bearing liabilities	175,624	173,548	175,397
Other liabilities	-	480	-
Total non-current liabilities	205,446	203,881	205,171
Current liabilities			
Provisions	838	334	853
Account payables	30,486	24,398	34,168
Short-term interest-bearing liabilities	800	8	928
Other liabilities	11,420	9,948	10,642
Accrued expenses	24,623	21,492	24,570
Total current liabilities	68,167	56,180	71,161
TOTAL EQUITY AND LIABILITIES	313,843	304,453	318,777

Financial Ratios

EUR thousands	30 Jun, 2015	30 Jun, 2014	31 Dec, 2014
Equity	40,230	44,392	42,445
Net debt	107,156	99,676	101,680
Shareholder loan	57,744	56,129	57,754

Consolidated Statement of Cash Flow

EUR thousands	Q2		Q1-2		Full Year
	2015	2014	2015	2014	2014
Operating activities					
Income before interest and taxes	-2 495	-4 987	491	-3 237	-1 097
Adjustments for non cash items before tax	3 770	3 855	7 583	7 338	15 319
Financial income received	-18	16	78	37	238
Income tax paid	-837	-560	-977	-839	-1 453
Cash flow from operating activities before changes in working capital	420	-1 676	7 175	3 299	13 007
Cash flow from changes in working capital					
Changes in operating receivables	-2 418	3 785	-353	8 079	537
Changes in work in progress	6 355	1 008	4 609	-425	-3 929
Changes in operating liabilities	611	-4 518	-5 767	-11 060	359
Cash flow from operating activities	4 968	-1 401	5 664	-107	9 974
Investing activities					
Acquisition of a subsidiary, net of cash acquired	-14	-	-968	-	-524
Purchase of property, plant and equipment	-1 726	-1 799	-3 744	-3 292	-9 180
Purchase of intangible fixed assets	-1 056	-635	-1 560	-877	-2 696
Sale of fixed assets	17	-	15	433	467
Cash flow used in investing activities	-2 779	-2 434	-6 257	-3 736	-11 933
Cash Flow before financing activities	2 189	-3 835	-593	-3 843	-1 959
Cash flow from financing activities					
New borrowings	-	120 000	-	120 000	120 000
Dividend to non-controlling interest	-192	-66	-192	-66	-66
Repayment of borrowings	-	-103 120	-	-103 120	-103 963
Utilization of overdraft	-	-	-	-	-
Financial costs paid	-1 644	-4 222	-3 513	-5 832	-7 697
Net cash flow from financing activities	-1 836	12 592	-3 705	10 982	8 274
Cash flow for the period	353	8 757	-4 298	7 139	6 315
Cash and cash equivalents, opening balance	16 130	14 414	21 509	15 789	15 789
Translation difference in cash and cash equivalents	59	-147	-669	96	-595
Cash and cash equivalents, closing balance	16 542	23 024	16 542	23 024	21 509

Consolidated Statement Of Changes In Equity

EUR thousands	Attributable to the owners of the company						
	Share capital	Other contributed capital	Other capital reserved	Retained earnings	Total	Non-controlling interest	Total equity
Closing balance December 31, 2013	6	6 771	-897	47 014	52 894	1 024	53 918
Transfer of equity	52	-	-	-52	-	-	-
Dividend	-	-	-	-	-	-65	-65
Net income for period	-	-	-	-10 657	-10 657	135	-10 522
Other comprehensive income	-	-	630	-1 516	-886	-	-886
Closing balance December 31, 2014	58	6 771	-267	34 789	41 351	1 094	42 445
Dividend	-	-	-	-	-	-227	-227
Net income for the period	-	-	-	-1 707	-1 707	71	-1 636
Other comprehensive income	-	-	-352	-	-352	-	-352
Closing balance June 30, 2015	58	6 771	-619	33 082	39 292	938	40 230

Income Statement, Parent Company

EUR thousands	Q2		Q1-2		Full Year
	2015	2014	2015	2014	2014
Sales	1,375	2,837	2,182	3,715	5,234
Gross profit	1,375	2,837	2,182	3,715	5,234
General administration and sale expenses	-632	-988	-1,417	-1,824	-2,990
Other operating costs/income	-626	-1,593	-711	-1,584	-1,901
Operating income	117	256	54	307	343
Income from shares in Group companies	-	1,000	-	1,000	1,000
Finance income	1,578	1,366	3,155	1,366	4,747
Finance costs	-1,656	-1,442	-3,233	-1,451	-4,903
Income after financial items	39	1,180	-24	1,222	1,187
Group contribution	-	-	-	-	5,320
Income before income taxes	39	1,180	-24	1,222	6,507
Taxes	-	-	-	-	-
Net income	39	1,180	-24	1,222	6,507

Statement of Comprehensive Income

EUR thousands	Q2		Q1-2		Full Year
	2015	2014	2015	2014	2014
Net income	39	1,180	-24	1,222	6,507
Comprehensive income	-	-	-	-	-
Comprehensive income after tax	39	1,180	-24	1,222	6,507
Total comprehensive income	39	1,180	-24	1,222	6,507

Statement of Financial Position, Parent Company

EUR thousands	30 Jun, 2015	30 Jun, 2014	31 Dec, 2014
ASSETS			
Non-current assets			
Participations in Group companies	76 296	76 296	76 296
Receivables, Group companies	117 950	117 950	117 950
Total non-current assets	194 246	194 246	194 246
Current assets			
Receivables, Group companies	908	317	71
Other receivables	48	43	68
Prepaid expenses	23	122	1
Receivables, daughter companies	19 386	16 094	20 216
Total current assets	20 365	16 576	20 356
TOTAL ASSETS	214 611	210 822	214 602
EQUITY AND LIABILITIES			
Equity			
Issued capital	58	58	58
Other contributed capital	6 771	6 771	6 771
Non restricted equity	86 685	81 424	86 709
Total equity	93 514	88 253	93 538
Non-current liabilities			
Long-term interest-bearing liabilities	117 925	117 810	117 699
Total non-current liabilities	117 925	117 810	117 699
Non-current liabilities			
Payables, Group companies	-	-	211
Accounts payables	31	413	27
Other current liabilities	369	1 108	528
Accrued costs	2 772	3 238	2 599
Total other non-current liabilities	3 172	4 759	3 365
TOTAL EQUITY AND LIABILITIES	214 611	210 822	214 602
Pledged assets and contingent liabilities			
Pledged assets			
Shares in subsidiaries	76 296	76 296	76 296
Total assets pledged	76 296	76 296	76 296
Contingent liabilities	None	None	None

Financial Instruments

Polygon is exposed to a number of financial market risks that the Group is responsible for managing under the financial policy approved by the Board of Directors. The overall objective is to have cost-effective funding in Group companies. The financial risks within the Group are mainly handled through weekly exchange of non-euro cash into euros and to a limited extent through financial instruments. The main exposures for the Group are liquidity risk, interest risk and currency risk.

The derivatives are valued to fair value within level 2 and additional considerations within level 3, according to IFRS13. Other financial instruments are valued to carrying amount.

Interest swaps are subject to ISDA agreements which allow netting, in case of any failure. On the closing day there were no interests swaps.

The significant financial assets and liabilities are detailed below. According to Polygon there is no significant difference between carrying amounts and fair value.

EUR thousands	30 Jun, 2015		30 Jun, 2014		31 Dec, 2014	
	Carrying amounts	Fair value	Carrying amounts	Fair value	Carrying amounts	Fair value
Assets						
Accounts receivables	68,240	68,240	59,286	59,286	67,705	67,705
Other current assets	7,699	7,699	6,690	6,690	6,086	6,086
Receivables, parent company	72	72	-	-	71	71
Cash and cash equivalents	16,542	16,542	23,024	23,024	21,509	21,509
Total	92,553	92,553	89,000	89,000	95,371	95,371
Liabilities						
Long-term interest-bearing liabilities	117,880	120,139	117,907	120,299	117,643	120,145
Other interest-bearing liabilities	57,744	57,744	56,129	56,129	57,754	57,754
Accounts payables	30,486	30,486	24,398	24,398	34,168	34,168
Other short-term liabilities	11,420	11,420	8,555	8,555	10,642	10,642
Accrued expenses	9,946	9,946	8,314	8,314	9,494	9,494
Total	227,476	229,735	215,303	217,695	229,701	232,203
Derivatives for hedging purposes						
Interest rate derivatives	-	-	480	162	-	-
Total	-	-	480	162	-	-

Definitions

Sales	Sales net of VAT and discounts
Gross profit	Sales minus cost of goods sold
EBITDA	Earnings before interest, tax, depreciation and amortisation
EBITA	Earnings before interest, tax and amortisation
EBIT	Earnings before interest and tax
Operating margin	EBIT in percent of sales
Net debt	Interest-bearing debt (including pension and leasing debts) minus cash and cash equivalent
Net income per share	Net income for the period attributable to owners of the company/average number of shares during the period
Non-recurring items (NRI)	Items attributable to capital gain/losses, impairment, restructuring and other redundancy costs

This report has not been subject to auditing.

Financial Calendar 2015

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Interim Report

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