NASDAQ:**OSS**

OSS
ONE STOP SYSTEMS

Bringing the POWER of the Datacenter to the Rugged EDGE

Corporate Presentation

September 2026

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This presentation shall not constitute an offer to sell or the solicitation of an offer to buy any securities, nor shall there be any offer or sale of any securities, in any state or jurisdiction in which the offer, solicitation, or sale of securities would be unlawful. Some images may be stock photos.

Financial metrics in this presentation are for the three- and six-months ended June 30, 2026, and June 30, 2025, unless otherwise noted. To the extent non-GAAP financial measures are included, reconciliations to the most directly comparable GAAP measures are provided where available; forward-looking non-GAAP measures may not be reconciled due to unreasonable effort.

Investment Thesis: We are at the Forefront of the HPC, AI, ML, and Edge Computing Revolution

Refocused strategy and new management team

- Realigned strategy focused on pursuing fast growing opportunities within large, global defense and commercial markets
- New leadership team with a track record of success driving growth and profitability within defense and commercial markets
- Converting $1B+ unfactored pipeline by developing integrated solutions and building multi-year, incumbent positions and predictable sales

Established technology positioned for secular HPC, AI and ML trends

- $20B global market for rugged edge compute for AI/ML, sensor fusion and autonomy applications (The Insight Partners)
- 25+ years of experience designing and manufacturing ruggedized enterprise-class compute solutions for demanding applications on the Edge
- Leading PCIe technology and engineering knowhow, combined with NVIDIA partnership, provide best-in-class solutions to support rapidly evolving market trends

Strong financial position and growth focused outlook

- Strong balance sheet with ample cash and cash equivalents and no debt accelerates organic and inorganic growth strategies
- Multi-year revenue growth driven by underlying operations
- Pursuing higher margin market opportunities and leveraging fixed manufacturing costs

Positive Momentum has Accelerated in 2026
YTD 2026 Highlights

OSS ONE STOP SYSTEMS

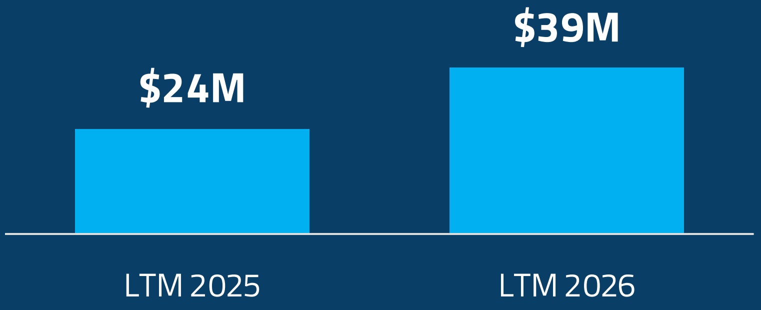
$17M+
Total Revenue
+59% YoY

~$30M
Record New Bookings
1.7x book-to-bill

44.9%
Gross Margin
YTD +160 bps YoY

$31M
Cash and Short-Term Investments
No debt, $44M in working capital
As of June 30, 2026

LTM REVENUE GROWTH
From continuing operations



STRATEGIC WINS & MOMENTUM
New bookings supporting multi-year revenue visibility

Broader award base
5 separate customers with $1M+ awards in first half of 2026

New intelligence platform for the U.S. DoD
$44M+ four-year revenue potential

PCIe Gen6
Expect first customer programs to emerge in the near future

YTD Customer-funded development revenue +145% YoY
Driven by enhanced vision system for combat vehicles prototype

* From continuing operations

Bressner Transaction Summary

Transaction Highlights

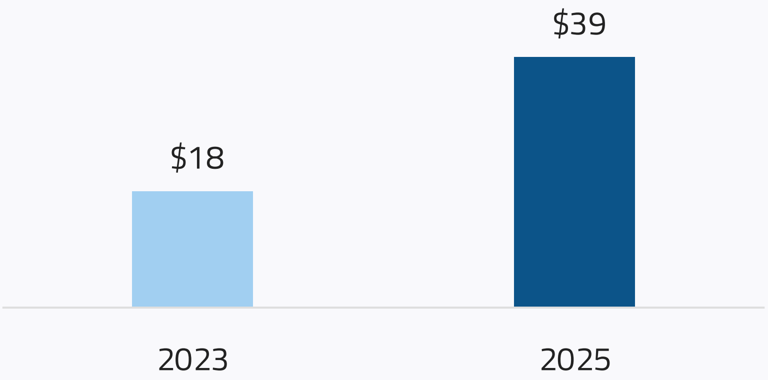
Overview	• $22.4 million[1] sale of Bressner, a European system integrator with standard and custom all-in-one hardware systems and components • Closed on December 30, 2025 • The transaction is expected to accelerate OSS's next phase of growth and profitability
Strategic Rationale	• Positions OSS to focus on the fastest-growing segments of its business, including deployable AI, real-time sensor processing, and rugged edge systems engineered for mission-critical defense and commercial environments • Simplified operating model that positions OSS to move faster, compete for larger programs, and capture multi-year organic growth opportunities • Expected to further strengthens the Company's balance sheet to support M&A opportunities that can add new customers, technologies, and solutions within its core AI, ML, and rugged-edge markets • Expected to be accretive to gross margin and support sales growth
Financial Considerations	• The transaction generated a pre-tax gain of approximately $6.7 million to 2025 full year results • Bressner is reported as a discontinued operation in all periods presented

[1] USD; final sale price subject to adjustment for final closing working capital balances

Converting Pipeline to Build Predictable Revenue Stream

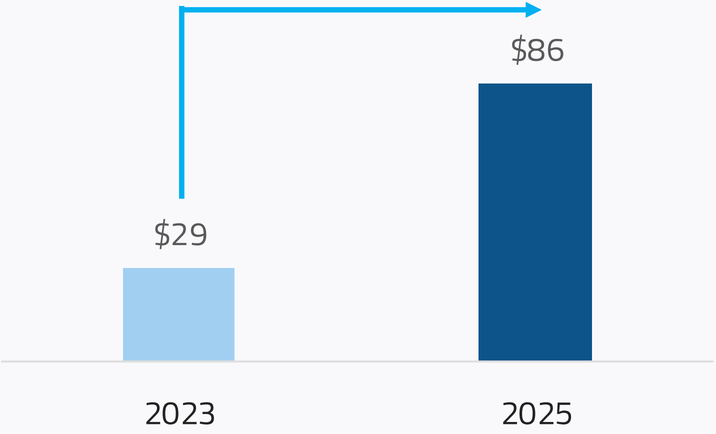
2 Yr. Bookings Growth ($M)

- OSS segment bookings in 2025, are up 115% from 2023
- Year-to-date bookings of $30M+



2 Yr. Average Order Value ($K)

- 3.0x+ Increase in Average Orders Since 2023



OSS is receiving a more diverse mix of larger orders, across more customers extending over multiple periods compared to order trends in prior years

Scaling Multi-Year Programs

Translating years of development into large, recurring production programs

14
Active multi-year programs
vs. just one program three years ago

5
Current programs over $10M
vs. one three years ago

$150M+
Combined multi-year orders
across just five programs

$10M+ Programs | **Cumulative Multi-Year Orders** (includes delivered and future expected orders)

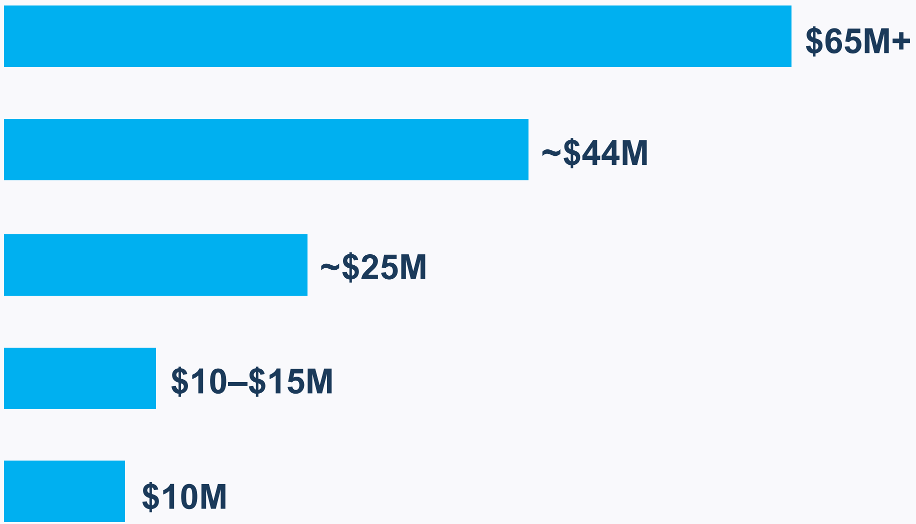
U.S. Navy P-8A Poseidon
Rugged flash storage supporting C5ISR mission systems aboard the maritime patrol aircraft

Leading Defense & Tech Co.
Short-depth servers for a signal-intelligence platform supporting the U.S. DoD

Medical Imaging OEM
Liquid-cooled servers standard on the OEM's breast cancer screening systems

Commercial Robotics
Compute platforms for autonomous construction and mining equipment

Autonomous Energy / Data Center
Edge compute supporting a network of renewable-energy-powered nodes



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About OSS

Market Opportunity

Strategic Growth Priorities

Financial Results

Appendix

Operating at the Intersection of AI/ML, Sensor Fusion & Processing, and Autonomy

OSS Nasdaq	**ESCONDIDO, CA** Corporate HQ
$260 mil. Market cap (at August 31, 2026)	**$1+ bil.** Current unfactored pipeline
Strong balance sheet Robust cash position and no debt	**100+** Global employees

Key Technology Partners

- **NVIDIA OEM Partner with NVLink design license**

Market Leading, Ruggedized Enterprise Class Solutions for the Edge

Most Compact Supercomputer

Most Powerful GPU Accelerator

Lowest Latency Fabric/PCIe Solutions

High-Density Flash Array

Embedded Software

Leading Outcomes for Customers

We take the highest performance leading commercially available technologies only available in controlled environments like datacenters and "ruggedize" them for the most demanding commercial and defense applications

Core Capabilities	Ruggedized SWaP-C	Advanced Cooling	Lowest Latency	Key Partnerships	Speed to Market	Powerful Software
Solutions Drive Better Outcomes	Memory 20x Better	Latency 350% Faster	Computational Performance 130x Better	Operating Speed 20+x Faster	Simultaneous AI Apps 28x More	Open Systems Compliant

Key Customers

RTX, U.S. Army, SNC, General Dynamics, Lockheed Martin, Leidos, Built Robotics, United States Navy, Safran, TORC, ST Engineering, Thales

Strengthened Leadership Team

Proven management team with extensive experience bringing innovative technologies to scale within global defense and commercial markets

Mike Knowles – President and CEO

Knowles has 30+ years of leadership experience in global aerospace and defense markets, including Cubic Corporation, Rockwell Collins, Lockheed Martin, and Curtiss Wright Defense Solutions. Over his career he has effectively developed and launched market-changing technologies and products in both defense and commercial markets.

Jim Ison – Chief Product Officer

Ison has 28 years of combined sales, product management and marketing management experience in leading-edge large-scale electronic systems using breakthrough technologies. His expertise covers government, communications and HPC markets with particular focus on AI applications in unique environments.

Paul Averna – VP of Business Development and Growth

Paul "PK" Averna has 30+ years' business development experience across defense and commercial markets. Before joining OSS he served as VP of VX Marine and previously as VP and GM of Cubic Corporation's Advanced Training Solutions. A former Naval Aviator, F-14 pilot and Top Gun instructor, Averna retired as a Navy Reserve Captain.

Jim Reardon – VP of Technology

Reardon joined OSS from Concept Development, Inc. (CDI), where he served as President for 29 years before the merger with OSS in 2018. CDI provided services to OEMs in the aerospace, medical, and industrial fields, mainly the development of embedded computer and networking components.

Daniel Gabel – Chief Financial Officer

Gabel has 14+ years of accounting, financial, and strategic leadership experience within the defense industry. Most recently, Gabel served as CFO of CAES' Defense System Division, a Division of Honeywell. Prior to this, he spent over 10 years at RTX Corporation (Raytheon) in various finance and accounting roles. He was appointed CFO of OSS in 2024.

Julia Elbert – VP of Engineering

Elbert has 23+ years of experience and is responsible for managing and leading the team of engineers at OSS to develop high speed electronic products focused around PCI Express.

Fabrizio Sardo – VP of Operations

Sardo joined OSS from SeeScan, Inc. where he was the Director of Manufacturing, overseeing operations and was responsible for a 20% YoY growth. Fabrizio also held key roles at HM Electronics, Inc., Thermo Fisher Scientific, Raytheon Aerospace , and TE Connectivity.

Growth Oriented Transformation

2023

Strategy Pivot integrating Defense Opportunities

- *Added proven defense industry Leaders and reprofiled Board of Directors*
- *Created new multi-year strategy*
- *Rebuilt sales pipeline to over $1 billion*
- *Reduced exposure to legacy, low margin, non-core markets*

2024

Convert pipeline to orders

- *Positioned more broadly across defense market*
- *Produced positive book-to-bill*
- *Achieved a book-to-bill of 1.14x in 2024*
- *Established new customer funded development revenue stream*
- *Pursued additional platform opportunities*

2025

Return to growth and profitability

- *2024 orders and new program wins expected to return OSS segment to YoY sales growth in 2025*
- *Expansion of gross margins*
- *EBITDA positive*
- *Sold Bressner for $22.4 million*[1]

2026+

Accelerate growth

- *Continued organic growth*
- *Platform acceleration from customer funded NRE*
- *Service and support*
- *EBITDA expansion through operating leverage*
- *Greater international sales*
- *M&A aligned with growth strategy*

[1] final sale price subject to adjustment for final closing working capital balances

M&A Strategy to Accelerate Scalable Growth

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Leveraging Balance Sheet Strength to Expand Capabilities in Core AI, Sensor Processing/Fusion & Edge Markets

Accelerate Platform Growth

- Streamlined, pure-play operating model
- Strong net cash position and no debt
- Clear focus on high-growth, high-margin markets
- Proven integration and value creation track record

Key M&A Considerations

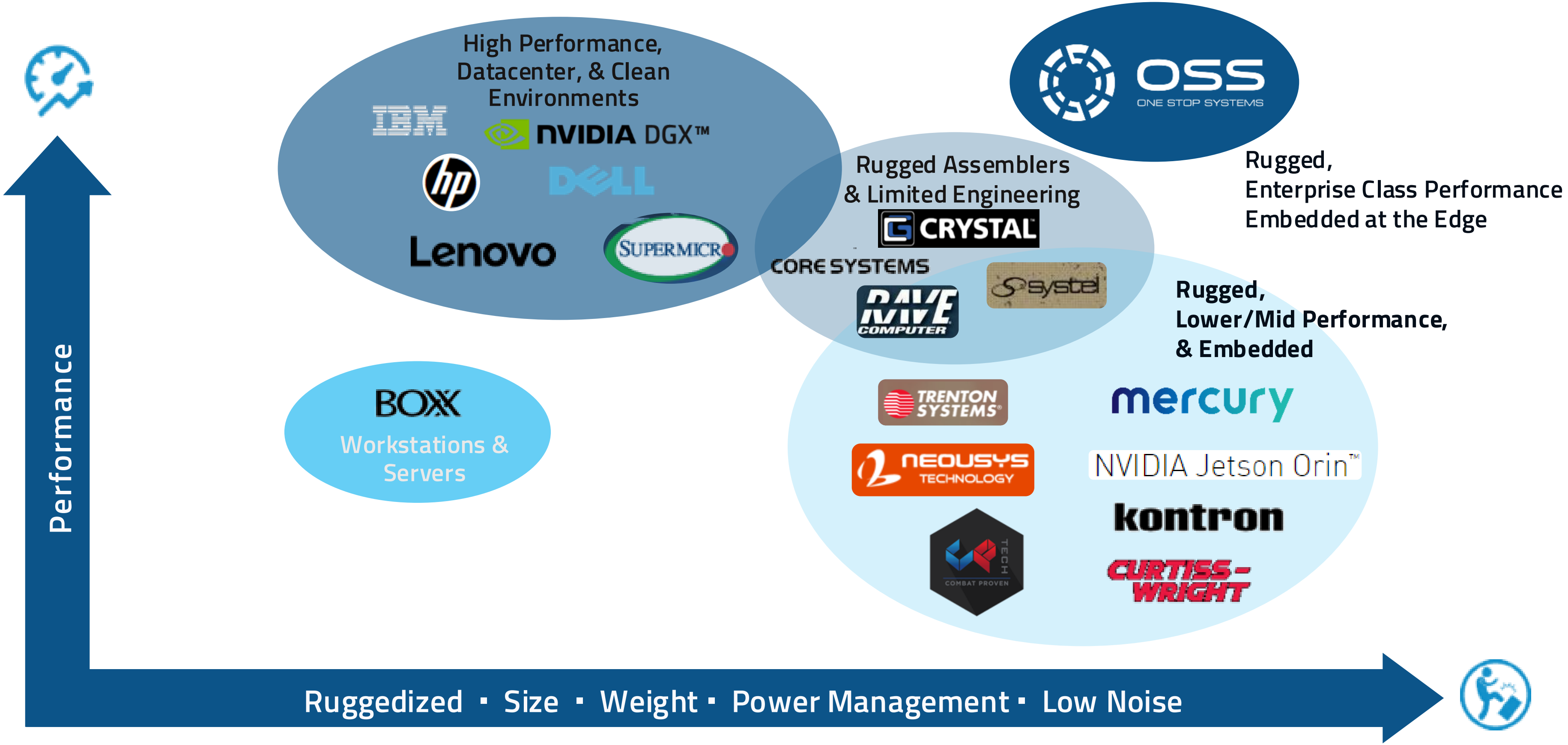
- Adjacent AI, ML, sensor processing/fusion and rugged edge hardware and software businesses
- Opportunities to add:
  - Customers
  - Technologies
  - Platforms
  - Solutions
- Strong customer relationships, platform positions, and backlog visibility
- Supports financial model
- Cultural alignment

Capital Allocations Priorities

- Accelerate Organic Growth
  - Geographic expansion
  - Sales and marketing
  - Research and development
- Disciplined M&A
  - Profitable with near-term earnings accretion
  - Bolt-on
  - Capability-enhancing acquisitions
- Maintain strong balance sheet

OSS Competitive Landscape

In the Realm of Rugged Performance At The Edge, OSS Stands Above



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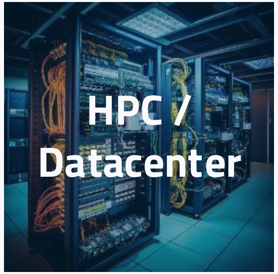
OSS's Enterprise Class Edge Compute Platform Address Massive Markets

Defense

Aligned with defense priorities: rugged, enterprise class edge compute for AI, autonomy, and sensor fusion

Commercial

Powering the next generation of intelligent industrial and commercial applications at the Edge



Compelling Position Within Rapidly Evolving Industry

$20B global market for rugged Edge compute for AI/ML, sensor fusion, and autonomy applications (The Insight Partners)

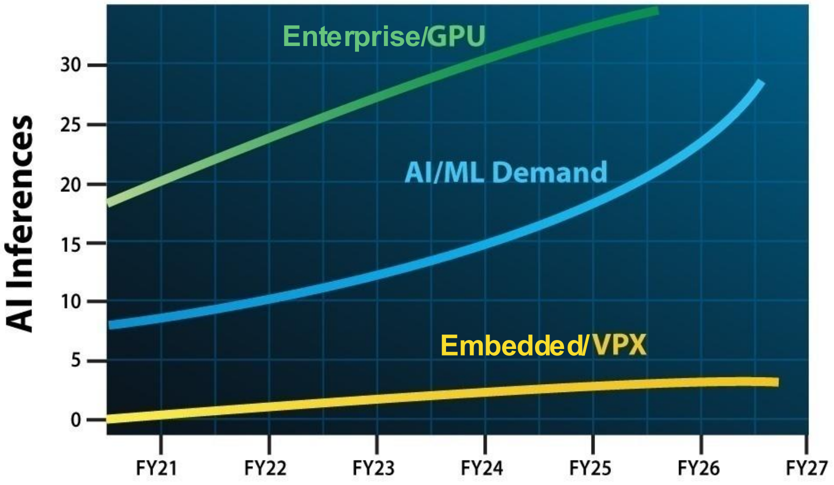
Demand on number of AI inferences per platform is increasing across Defense and Commercial applications

Legacy embedded technologies cannot keep up with growing AI/ML demands that require higher compute and low latency performance

Emerging enterprise class capabilities are required to take advantage of AI/ML, sensor fusion and autonomy at the Edge

Department of State is restricting GPU sales to adversaries, as a result of market dynamics and compute power requirements

AI and ML Applications Demanding Greater Compute Power



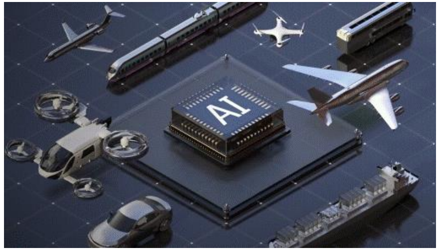
The transition from current embedded computing to enterprise class will grow in demand and fuel OSS's long-term growth opportunity

Pursuing Four Large Scale Strategic Market Opportunities

Commercial Datacenters

Capture niche opportunities in commercial and non-traditional datacenter environments, alternative energy, and composable infrastructure, leveraging standard products to maximizing the benefit of GPU expansion and low latency switch fabrics

Intelligent Infrastructure



Pursue commercial edge processing opportunities in Aerospace, Space, Medical, Oil/Gas, Transportation, and other markets that require unique enterprise class compute for sensor processing, where HPC and low latency are key requirements

Tactical Vehicles

Leverage proven embedded HPC solutions delivering HPC, low latency and TSN, tested and validate by the US Army across multi-service, multi-platform and multi-national opportunities

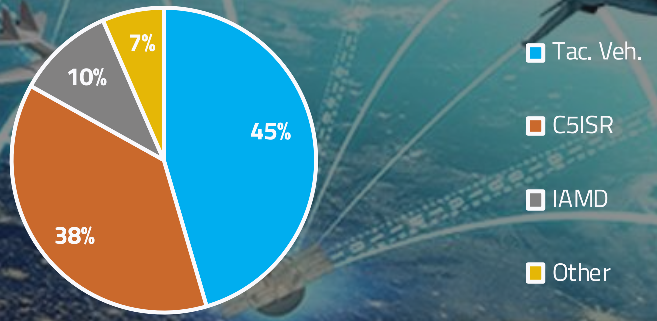
C5ISR

Leverage OSS standard products and design capabilities to deliver enterprise class compute and superior low latency performance to global multi-domain C5ISR military platforms whose operations rely on sensor processing, fusion, AI/M, and autonomy.

Current opportunities within represent an estimated unfactored pipeline of over $1 billion

OSS Segment is Aligned with DoD and Commercial Market Priorities for High Performance Compute

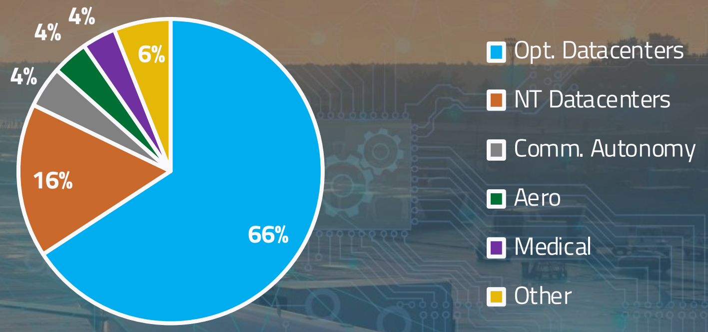
Current Defense Pipeline
Estimated $750 Million



Joint All-Domain Command and Control Priorities

Sensor processing, sensor fusion, autonomy and Inferencing tools are becoming critical to new warfighting concepts. This requires more AI processing power in the field, at the Edge, which must endure in exceptionally harsh battlefield environments.

Current Commercial Pipeline
Estimated $650 Million



Industry 4.0 Driving Need for Intelligent Computing

Data Center Optimization, Non-traditional Data Center deployments, autonomous systems, commercial aerospace, IoT, and AI/ML applications require greater connectivity, advanced analytics, automation, and advanced manufacturing technology.

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Financial Priorities

Pipeline conversion to drive organic revenue growth

Develop more predictable revenue streams and diversify revenues by customers, applications, and geographies

Expand gross margins as platform positions mature from development into production and sustainment, while pursing higher margin opportunities and leveraging fixed manufacturing costs

Control operating expenses, while pursuing strategic growth investments in sales/marketing and R&D, to drive higher returns

Generate free cash flow and maintain strong balance sheet

Growth Strategies Focused on Expanding the Company's High-Growth, High-Margin OSS Segment

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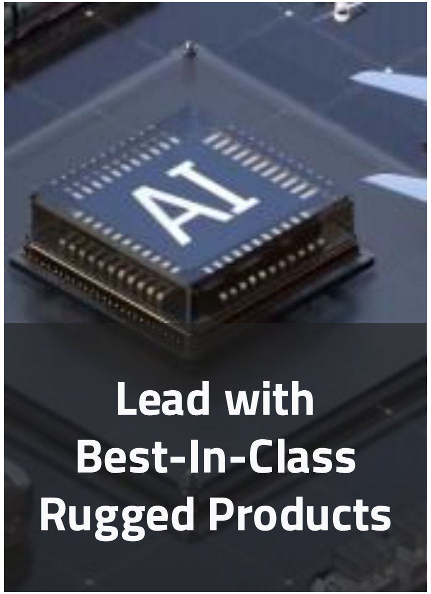
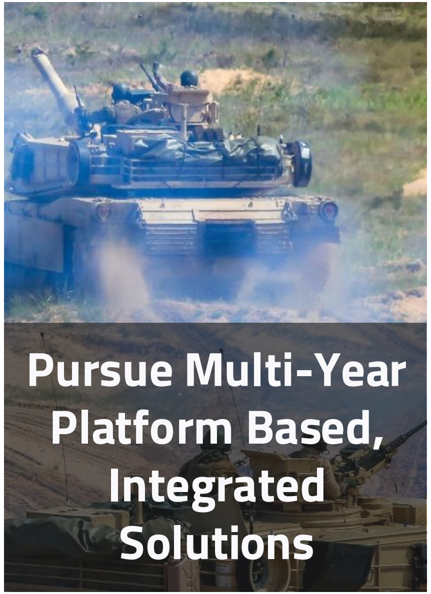


Lead with Best-In-Class Rugged Products

- Standard product lines
- Deliver high margins
- Retain commerciality
- Agnostic to application



Pursue Multi-Year Platform Based, Integrated Solutions

- Grow multi-year revenue
- Build Sustainable Customer Funded Development Revenue
- Land and expand footprint
- Create HW/SW solutions
- Establish stickiness

Disciplined M&A

- Business-adjacent acquisitions
- Extend reach into new platforms and channels
- Profitable and accretive in the near term

Expand International Sales Opportunities

- Adds ~$1B to pipeline opportunity
- Creates global presence
- Exportable product offerings

Support Best-in-Class Product Line

Product Development

Product development expected to be 8%-10% of OSS Segment annual revenue

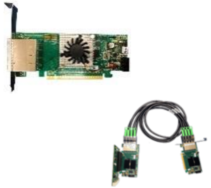
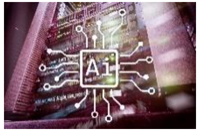
More than five new products currently under development and product refresh underway across OSS' portfolio

OSS is a leader in PCIe technology - not only bringing it to market but applying it at the Edge and in rugged environments, in addition to datacenter applications

- NVIDIA OEM Partner
- NVIDIA Certified
- OEM Partner with NVLink design license

R&D Priorities Aligned with Emerging Markets

R&D Priorities

Servers	Storage	Fabric/PCIe	Scale Out	Software
				
MGX Form Factor Blackwell™ GPU	**E1.S NVMe Ion Accelerator™**	**PCIe Gen 6 CXL 3.0**	**OCP GPU Expansion**	**U-BMC AI/ML**

Market Focus

Air C5ISR	Ground C5ISR	Maritime C5ISR	Autonomy	PCIe Expansion
				

Expand Customer Funded Development Revenue

Build Long-Term Sustainable Revenue Streams

Establish incumbent position and opportunity to expand within platform architecture

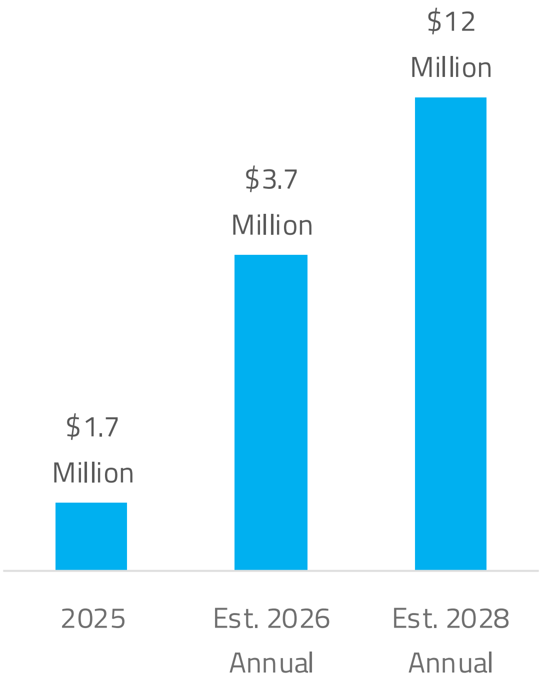
Transition to multi-year contract for production, support, and tech refresh at high margin with predictable backlog and revenue

Mid-teen target margin for customer funded development revenue that will lead to production margin of 40+%

Create 10+ year total lifecycle annuity at product GM%

Multiple strategic campaigns under development across global C5ISR, Autonomy, and Composable markets

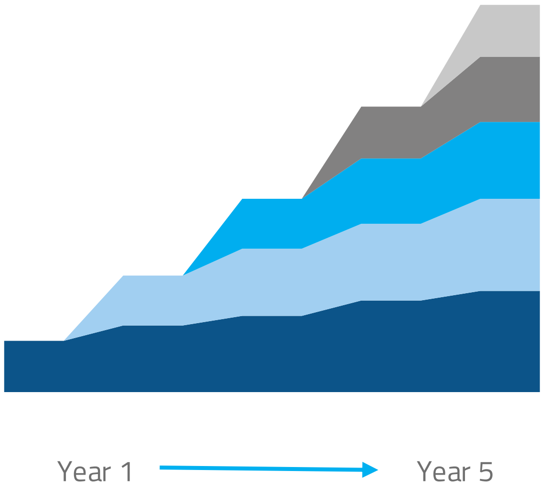
Grow Customer Funded Development Revenue



Illustrative Land and Expand Platform Growth Model

~$450 Million

Cumulative Platform Opportunities from 2023 to 2028



Pursuing Multiple Transformative Opportunities

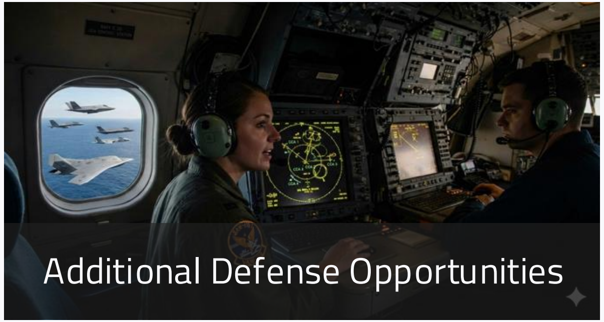
Expanding beyond current programs into new platforms, markets, and mission sets

U.S. Army Sensor Distribution

Counter UAS concepts require local vehicle formation data fusion, threat classification, cueing, and engagement, leveraging OSS PCI-e fabric, ruggedized compute, and data management in Vehicle Kit upgrades for US Army ground vehicles.

Non-Traditional Data Centers

Available Power and Cooling for Data Center Compute intensive applications becoming a limiting factor for new Data Center deployments. Leveraging OSS expertise in Edge/Harsh environments is aligned to investment funding pursuing Maritime and Space alternatives supporting Signal processing, Sensor Fusion, and Inference demand.



Additional Defense Opportunities

Airborne C2 Tech Refresh to increase available Signal Processing, Sensor Fusion, AI Inferencing provides OSS expansion opportunities on platforms such as P-8, E-2D, and European Golden Eye.

While OSS expects these potential programs to take multiple-years to develop, they represent significant opportunities to extend OSS beyond its current program base

Platform Case Study: P-8

Customer Requirement

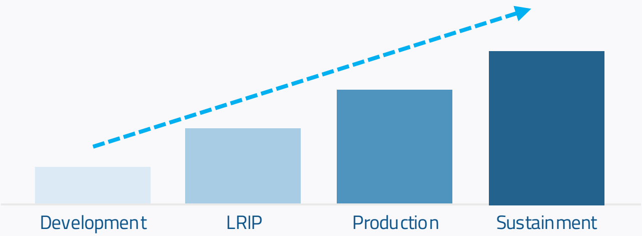
- High-performance, high-capacity sensor data storage
- Mobile and expandable, airborne and ground station compatible
- Mil-std SWaP-optimized, rugged & secure

OSS Solution Design-Win

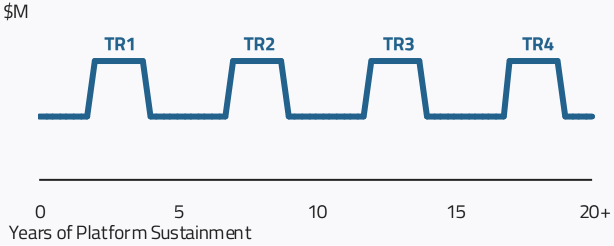
- Light-weight compact chassis, four removable 50 Terabyte flash drive canisters
- Specialized storage software with extreme low latency in read/write operations
- Canisters transport to ground system for long-term storage and analysis

Phase 1	Phase 2	Phase 3	Phase 4
Initial Development	**LRIP**	**Full-Rate Production**	**Sustainment**
$800K	**$20M**	**$40M**	**$40M**
Two-year design and test	*Low-rate initial production*	*Multi-year recurring orders*	*20-year plus forecast*
Design, qualification and test of customer funded solution	First production units at low build rates	Recurring multi-year orders at full build rate	Support and tech refresh across the installed base

Gross Margin Percentage Expands as Platform Positions Mature



Sustainment Produces Steady Revenue with Higher Revenue Periods from Tech Refresh (TR)



OSS has recognized $65M+ from the P-8, with recurring orders and support still ahead

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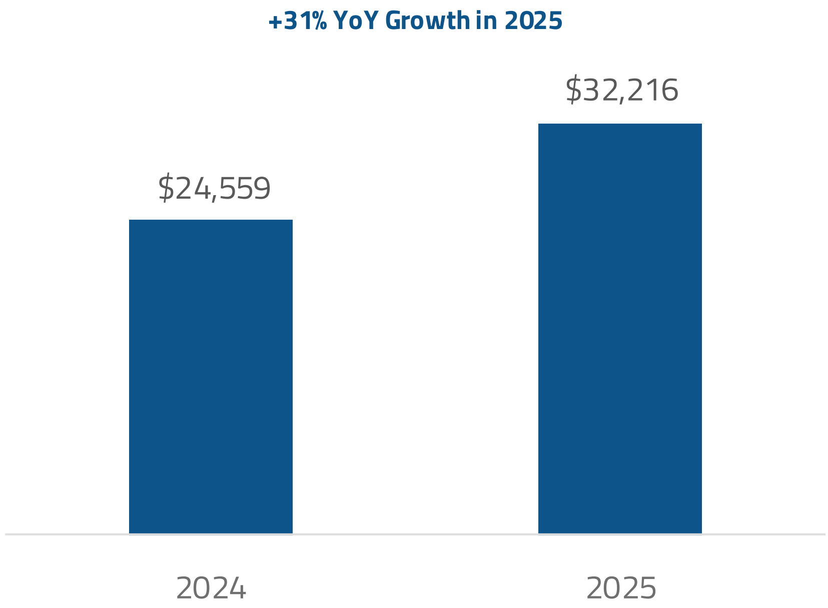
Returning to Revenue Growth After Successful Transformation[1]

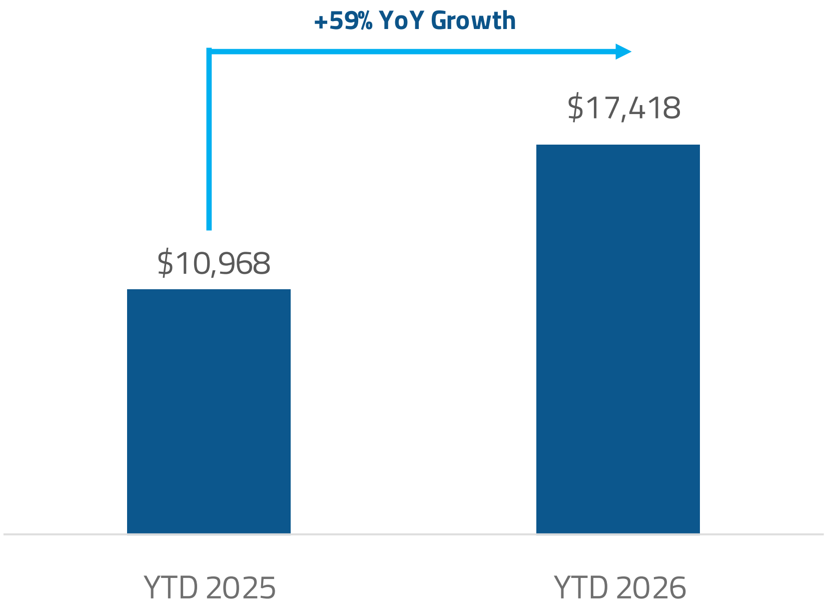
Annual Total Revenue

$ in 000's



YTD Quarterly Total Revenue

$ in 000's

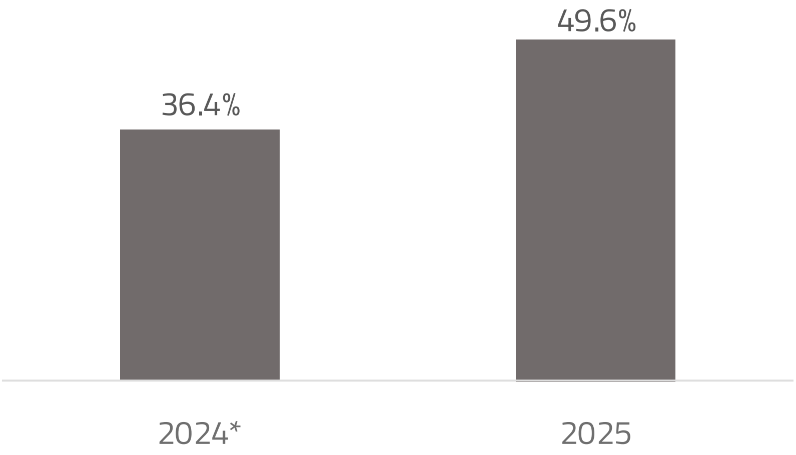


[1] From continuing operations

Revenue Transformation Supports Strategies to Expand Gross Margin[1]

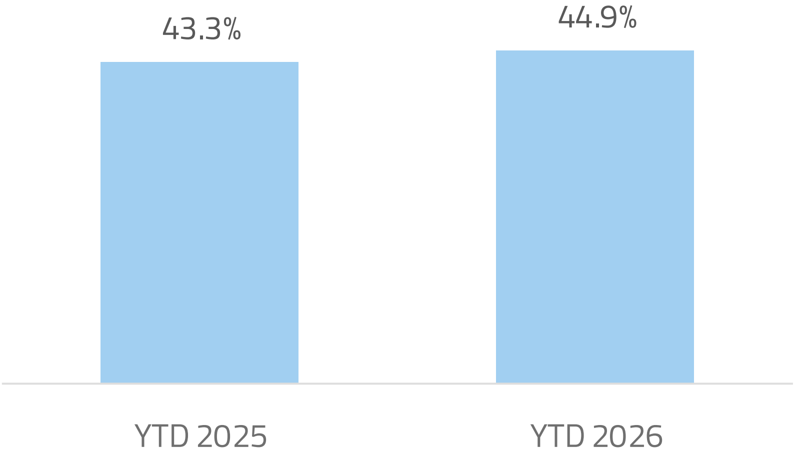
Annual Gross Margin

Long term focus on expanding gross margin to 40+% through improved manufacturing absorption and platform growth



* Adjusted to exclude inventory charge taken in the third and fourth quarter of 2024

YTD Quarterly Gross Margin



2025 gross margin benefited from both operational efficiency and a favorable product mix

[1] From continuing operations

Key Takeaways

Operating in a resilient global market for rugged Edge compute for AI/ML, sensor fusion, and autonomy applications

Differentiated product and program focused offerings creating significant commercial and Defense opportunities

$1B+ pipeline with $450M+ of platform opportunities to achieve long term incumbent positions

New Executive and business development leadership team with a track record of success in driving growth and profitability

2025 was a defining year, with a return to YoY revenue growth, EBITDA profitability, and strong balance sheet

Capital light plan to achieve double-digit revenue growth and double-digit EBITDA margins over the next few years

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Glossary of Terms

Term	Definition
AI	Artificial intelligence
C5ISR	Command, Control, Communications, Computers, Cyber, Intelligence, Surveillance and Reconnaissance
Commerciality	Protection category in Defense contracting that allows seller who sells product based on owned IP commercially to retain IP rights and forgo requirement to provide cost data and follow Federal Acquisition Requirements profit guidelines
EDGE Computing	Brings information storage and computing abilities closer to the devices that produce information and the users who consume it
GPU	Graphics processing unit (GPU) is an electronic circuit that can perform mathematical calculations at high speed
HPC	High performance compute
IoT	The Internet of Things (IoT), is s a network of interrelated devices that connect and exchange data with other IoT devices
JADC2	Joint All-Domain Command and Control or JADC2 connects sensors from all branches of the armed forces into a unified network
LLM	Large language models

Term	Definition
ML	Machine Learning
NVMe	Non express
OCP	Open compute project
PCIe	Peripheral Component Interconnect Express is a connection used for high-speed data transfer between electronic components
SAM	Serviceable Addressable Market
Scale Out	Computer architecture that uses multiple processers as a single entity to expand the capital of a single server
Sensor Fusion	Combines information from multiple sensors and platforms to improve accuracy and situational awareness
TRL	Technology readiness level
UBMC	Unified baseboard management controller
VPX	VPX is a set of computing standards commonly used by defense contractors.

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