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Oggetto : Message from Chairman Enrico Magni to
Shareholders of TXT

Testo del comunicato

Vedi allegato



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TXT e-Solutions: Message from Chairman Enrico Magni to Shareholders

Milan, 6 February 2026

Dear Shareholders,

In recent weeks, the share price of TXT e-Solutions has been subject to significant pressure, in line with the trend affecting the entire technology sector in Italy, across Europe and in global markets. In our view, the current market valuation does not adequately reflect the Group's quality, the intrinsic value of its proprietary assets, the strength of its fundamentals, or the growth trajectory achieved in recent years. The speculative dynamics that have fuelled recent volatility—often linked to the presumed disruption generated by artificial intelligence—do not alter our strategic outlook. We believe that such risks are marginal within the context of our business model and that, on the contrary, AI technologies represent an additional acceleration factor within the horizon of the 2025–2027 Industrial Plan, the objectives of which we fully confirm.

Preliminary Q4 2025 figures, to be released on 27 February, indicate that performance in the quarter exceeded that of the first nine months of the year, both in terms of growth and, more notably, profitability, driven by strong results across all of our core business sectors.

The Defence segment continues to drive expansion, supported by a structural increase in spending levels and by the strategic relevance of our highly mission-critical solutions.

Civil Aviation is also showing solid trends, with growing demand in both digital and operational domains, fuelled by the increase in global air traffic and by heightened interest in our technologies aimed at reducing fuel consumption and supporting advanced pilot training.

The Public sector is also evolving positively. The contribution of Italy's National Recovery and Resilience Plan (PNRR) to the project pipeline has now become marginal and is more than offset by a significant increase in activities linked to ordinary public expenditure, which is more stable and sustainable over the long term. In this area, we hold a residual backlog of awarded tenders of approximately €200 million, alongside a substantial pipeline of new opportunities expected to materialise during the current financial year.

The initiatives launched in recent months—including the internationalisation of digital marketing activities, expansion into the digital payments sector, and, more recently, the new



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IoT/OT platform for monitoring critical infrastructures, integrating proprietary platforms and smart sensors developed by our German subsidiary—are already generating tangible results in the fourth quarter, with a very favourable outlook for 2026. These are strategic investments that further strengthen our competitive positioning and expand our base of higher-margin revenues.

The Group's industrial profile is built around three key pillars: our ability to deliver high value-added services that are tightly embedded in the core operations of major clients; the development of vertical smart solutions and proprietary platforms incorporating advanced, AI-enabled functionalities; and a diversified portfolio, underpinned by a strong presence in markets characterised by high investment intensity and attractive growth prospects. Together, these elements form a coherent and resilient system, allowing us to look ahead with confidence and without expecting material adverse impacts from external factors.

As reference shareholder, I wish to reaffirm my confidence in TXT's industrial value, the quality of its management, the expertise of our teams, and the robustness of its economic and financial fundamentals. Over the years, I have consistently increased my shareholding, firmly supporting the Group's growth and contributing to the strengthening of its foundations. In line with this approach, I confirm that the ongoing share buyback programme will be accelerated, an initiative that will also support our continued M&A strategy. Several synergistic transactions are currently under evaluation, with the aim of completing them within the first half of the year.

I would like to thank all shareholders for their trust and for their continued support of our growth journey. We remain firmly committed to the disciplined execution of our Industrial Plan and to generating sustainable value for all our stakeholders.

Enrico Magni

Chairman and Reference Shareholder

TXT e-solutions S.p.A.

TXT is an international IT Group, end-to-end provider of consultancy, software services and solutions, supporting the digital transformation of customers' products and core processes. With a proprietary software portfolio and deep expertise in vertical domains, TXT operates across different markets, with a growing footprint in Aerospace, Aviation, Defense, Industrial, Government, Fintech and Martech. TXT is headquartered in Milan and has subsidiaries in Italy, Germany, the United Kingdom, France, Switzerland, Canada, Singapore and the United States of America. The holding company TXT e-solutions S.p.A. has been listed on the Italian Stock Exchange, STAR segment (TXT.MI), since July 2000.

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