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Oggetto : NEXI 2026 CAPITAL MARKETS DAY

Testo del comunicato

Vedi allegato



NEXI 2026 CAPITAL MARKETS DAY

THE ENDURING PLATFORM TO POWER CASH GENERATION

- **Uniquely positioned in a growing dynamic market**, leveraging its European scale and strong local market entrenchment and ready to capture the emerging opportunities from the growing complexity and richness of digital payments
- **Enduring growth from a diversified and attractive portfolio**, combined with operational excellence and disciplined investments to drive **strong cash generation and capital distribution**
- **~€ 2.4 billion total excess cash generation over 2026 – 2028** with return to mid-single digit revenue growth in 2028
- **2026 proposed dividend at ~€ 350 million** (€ 0.30 dividend per share, corresponding to ~9% dividend yield), growing at least 5% per year; **> €1.1 billion total distribution over three years**. Commitment to maintain **Investment Grade** status

Milan, 5th March 2026 – Nexi is unveiling its strategic plan and mid-term financial targets at today's Capital Markets Day, approved yesterday by Board of Directors.

Over the recent years, the Group has made significant progress in a very dynamic market environment, further strengthening its financial profile and cash generation, underpinning a significant capital return to its Shareholders: Nexi expanded net revenues at € 3.6 billion as of December 2025, maintaining a strong focus on operational excellence and cost discipline, and delivered € 1.9 billion of EBITDA, with a best-in-class EBITDA margin of 53%. In the last three years the Group generated € 2.1 billion of excess cash, enabling € 1.1 billion capital return to its shareholders, while reducing in the meantime the financial leverage to 2.6x in 2025 and reaching the investment-grade status.

"Over the last three years, Nexi has continued to grow profitably in an increasingly dynamic environment, doubling cash generation and starting dividend distributions to its shareholders" said Paolo Bertoluzzo, CEO of the Nexi Group. "Today, Nexi has consolidated a unique position in the European digital payments landscape, establishing itself as a trusted European platform capable of turning the sector's growing complexity into opportunities for citizens, businesses, banks and institutions. In an environment that is increasingly fragmented, regulated and technologically advanced, our unique combination of European scale and strong local roots enables us to offer integrated, secure and reliable solutions and to serve as strategic infrastructure for Europe. We are at the heart of the sector's ongoing technological transformation. Our investments, product innovation and gradual adoption of artificial intelligence strengthen every day our ability to simplify growing complexity and generate new growth opportunities, thanks to the commitment and competence of our people. On this basis, we are entering a new phase of sustainable



development, supported by a diversified and attractive business portfolio which, combined with continued operational excellence and disciplined investments, will allow us to continue in our cash generation and shareholder remuneration journey, always ready to face the challenges and capture the opportunities of a sector that is undergoing a continuous and extraordinary evolution."

The Group benefits and will continue to benefit from a **strong, unique positioning in a dynamic market**, supported by secular growth, particularly in Nexi under-penetrated geographies. As payments become increasingly complex for customers, the European payment landscape remains very fragmented and local, making Nexi combination of scale and deep local capabilities and market entrenchment as a distinctive competitive advantage. Acting as a trusted European platform, Nexi transforms the growing complexity of payments into opportunities, enabling long-term value creation across the ecosystem.

The Group delivers an **enduring growth leveraging on a diversified and attractive portfolio** of Core engines (Italy and Nordics), with leading market position, and Growth engines (Integrated Payments, eCommerce, DACH region, Issuing products and CSEE region), with challenger market position. In the past years the underlying revenue growth has been structurally at around mid-single digit+, proving to be very resilient to the evolving market dynamics and competitive environment; this growth profile will simply re-emerge from 2028 as the exceptionally high Bank contracts effects will be back to normal levels.

The Group's growth strategy is powered by a set of strategic initiatives to be executed across the business areas:

Nexi's **Merchant Solutions** strategy is targeted to the SMEs, mid-market eCommerce, and national mid-corporate market segments. SMEs across Europe require strong local capabilities in a highly fragmented, country-specific market, while increasingly demanding fully digital, integrated solutions beyond payments and stronger direct commercial support. In this space growth will be driven by (i) SmartPay, Nexi's highly digital and hyper-local omni-acceptance solution, (ii) Integrated Payments with ISV partners through a dual approach – Nexi Integrated for ISVs and Nexi Smart Commerce for merchants, and (iii) multi-channel distribution investments aimed at expanding sales force by more than 600 people. The European mid-market eCommerce segment represents a key growth opportunity, combining attractive margins and strong cross-selling potential with lower competitive intensity. Nexi's strategy is to accelerate growth through Nexi Checkout, a collecting checkout solution that combines advanced digital enablement with strong local capabilities and reflects Nexi's agile innovation model. National mid-corporates represent another substantial growth opportunity for Nexi, with attractive economics and relatively less competitive intensity. In this space, demand grows for integrated in-store and omnichannel solutions, supported by local expertise, proximity, and tailored service. Nexi aims to secure its leadership in the segment through Nexi Unified, its best-in-class omnichannel proposition that blends advanced digital capabilities with distinctive local strengths, tailored for the retail, hospitality, and smart mobility verticals.



Nexi's strategy in **Issuing Solutions** is designed to help European Banks and Corporates manage rising payment complexity by offering one of the most comprehensive advanced digital issuing portfolios in Europe – covering Issuing Processing, Value-Added Services, and fully managed end-to-end Issuing Products. By simplifying operations, supporting compliance, and accelerating innovation through a managed model, Nexi enables clients – especially mid-to-small banks and corporates – to deliver faster innovation and superior digital customer experiences. In Issuing Solutions, Nexi focuses on two complementary growth drivers: increasing value from customer base, with an expanding suite of value-added services designed to improve performance, efficiency, and engagement; and accelerating adoption of Issuing Products across Europe by deepening existing relationships and attracting new clients seeking reduced complexity and greater competitiveness, leveraging a multi-year IT experience and ability to build long-term partnerships in Italy. At the heart of this ambition sits Nexi Ready, built on a pan European, next-generation platform capable of supporting all types of banks and corporates. Nexi Ready provides a unified, modular and scalable environment that enables rapid deployment, consistent cross-country execution and continuous innovation, allowing clients to operate efficiently while benefiting from best-in-class digital experiences and future ready capabilities. Nexi Ready has been recently launched in Germany and will be progressively expanded through geographies.

The Group confirms its commitment to drive operational excellence and efficiency, also supported by a pervasive AI adoption and continued progress on technology transformation to combine innovation agility, local differentiation and cost efficiency at the same time. In addition, disciplined accelerated investments on key strategic areas, such as products and SME multi-channel distribution, will further power growth.

All of the above will continue to drive **strong cash generation and sustainable capital distribution**; combined with the continued reduction of the EBITDA leverage to a ~2.0x-2.5x target level. The Group financial targets of the strategic plan are the below:

	2026	2026 – 2028
Net revenues	Y/Y growth broadly in line with 2025 Merchant Solutions reaccelerating	Return to mid-single digit growth in 2028
EBITDA	Absolute amount broadly stable after strategic investments	Return to EBITDA margin expansion in 2028
Excess cash¹	~€ 750 million, after strategic investments and higher taxes	~€ 2.4 billion total over the period
Capital Allocation	0.30 € dividend per share equal to ~€ 350 million dividend distribution Commitment to Investment Grade	Dividend distribution growing at least 5% per year (> € 1.1 billion total distribution over 2026 – 2028) Commitment to Investment Grade

¹ Operating cash flow generation after cash interest expenses and other cash items (cash taxes, IFRS 16 and other).



Furthermore, the strong unique positioning and the strong capabilities make the Group able to capture future growth opportunities including the further expansion of payment methods and AI driven evolution.

Nexi

Nexi is Europe's PayTech company operating in high-growth, attractive European markets and technologically advanced countries. Listed on Euronext Milan, Nexi has the scale, geographic reach and abilities to drive the transition to a cashless Europe. With its portfolio of innovative products, e-commerce expertise and industry-specific solutions, Nexi provides flexible support for the digital economy and the entire payment ecosystem globally, across a broad range of different payment channels and methods. Nexi's technological platform and the best-in-class professional skills in the sector enable the company to operate at its best in three market segments: Merchant Solutions, Issuing Solutions and Digital Banking Solutions. Nexi constantly invests in technology and innovation, focusing on two fundamental principles: meeting, together with its partner banks, customer needs and creating new business opportunities for them. Nexi is committed to supporting people and businesses of all sizes, transforming the way people pay and businesses accept payments. It offers companies the most innovative and reliable solutions to better serve their customers and expand. By simplifying payments and enabling people and businesses to build closer relationships and grow together, Nexi promotes progress to benefit everyone. www.nexi.it/en
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