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Testo del comunicato

Vedi allegato



Esautomotion approves the draft 2025 financial statements and the 2025 consolidated financial statements

**Revenue growth +10.4%,
Operating Cash Flow + Euro 4.8 million;
NFP: Euro 5.8 million (positive net cash)**

CONSOLIDATED FINANCIAL STATEMENTS AS AT 31/12/2025:

- **Total REVENUES: Euro 29,999 thousand (vs. Euro 27,167 thousand in 2024), +10.4%**
- **EBITDA: Euro 5,805 thousand (vs. Euro 3,958 thousand in 2024), +46.7%**
- **EBITDA *margin*: 19.4% (vs. 14.6%), +4.8 percentage points**

NET PROFIT Euro 2,204 thousand (vs. Euro 868 thousand in 2024), 2.5x

NET PROFIT *margin* 7.3% (vs. Euro 3.2%) + 4.1 % percentage points

- **OPERATING CASH FLOW: Euro 4,847 thousand (vs. Euro 4,616 thousand in 2024)**
- **. NET. FIN. POS.: (POSITIVE CASH) of Euro -5,837 thousand (vs. Euro -4,679 thousand in 2024),**
- **TREASURY SHARES HELD: 213,000**

Carpi, 27 March 2026

The Board of Directors of Esautomotion S.p.A. ("**Esautomotion**", "**ESA**" or the "**Company**"), the operating *holding company* of the Esautomotion Group (the "**Group**") active in the sector of high-precision mechatronic components for industrial machinery, today approved the Consolidated Financial Statements and the Draft Financial Statements for the year ended 31 December 2025.

MAIN CONSOLIDATED RESULTS 2025

Group Sales as of December 31, 2025 amounted to **Euro 29,999 thousand**, an increase of **10.4%** compared to December 31, 2024.

The improvement in 2026 reflects the intense activity in the development of new customers as the majority of historical customers remain well below the historical order.

In 2025, the global geopolitical and economic context has not allowed the growth of global markets, The comparison with the revenue growth figures of the financial statements of Fanuc Fa (Automation division) which is by far the world leader in CNC systems is shown below; although 38 times bigger than Esautomotion and focused on different types of CNC machines, it is very representative of the trend of the world market..

ANNUAL REVENUE GROWTH	21/20	22/21	23/22	24/23	25/24	25/20	CAGR
FANUC Fa	37%	14%	-32%	+14	-1	0%	0
ESAUTOMOTION	62%	19%	+5%	-20	+10	71%	11,4

The intense development activity has made it possible to reverse the negative trend by seizing new opportunities that are additional to the historical customer base.

The Group's level of direct exports represents about 50% of revenues. Added to this is the share of products sold on the domestic market and subsequently exported by our machine manufacturer customers. Overall, it is estimated that direct and indirect exports reach about 80% of revenues.

EBITDA amounted to Euro **5,805 thousand** (19.4% of Revenues), margins increased by **4.8 percentage points** compared to the 2024 financial statements (14.6% of Revenues).

R&D remains the Group's largest area of investment. In particular, research and development activities continued, mainly aimed at:

- integration between different mechatronic technologies;
- development of 4.0 communication logics and networking;
- increase in performance;
- development and integration of new devices, sensors, components;
- development of new kinematics;
- improvement of energy efficiency and *green transition*;
- materials engineering;
- new complementary and synergistic business lines on motors and drives.

These activities have allowed Esautomotion to continue the development of **software** and **new integrated devices according to the principles of Industry 4.0**, and to consolidate the performance of the products **in new application sectors**.

The company invested Euro 1,583 thousand in R&D, in line with previous years (5.3% of Revenues).

The Consolidated Net Financial Position shows a positive net cash balance of Euro 5,837 thousand compared to Euro 4,679 thousand as of December 31, 2024. It should be noted that during 2025, approximately 2,083 thousand were invested, with effect on the NFP, in a new real estate complex of 2,500 square meters in Viallasanta (Monza) to which the subsidiary Sangalli Servomotori has transferred its production site. Operating working capital decreased by -2.7% compared to 2024,

In addition, the Company holds **213,000 treasury shares** - equal to a total amount of **approximately Euro 686 thousand**, as of the listing on March 27, 2025 (Euro 3.22 each) - for Euro 562 thousand.

Shareholders' equity amounts to Euro 32.160 thousand.

CEO **Gianni Senzolo** said: *"2025 was still a difficult year: the general economic situation has further slowed down investments in durable goods, however the continuous attention to geographical coverage, the search for new customers, and the development of new products has allowed a expansion in revenues in contrast with the trend.*

We have also introduced redesigned products to reduce dependency on key component suppliers and improve performance for customers.

OUTLOOK FOR OPERATIONS:

In a complex economic and financial environment marked by high macroeconomic and geopolitical uncertainty, the Group remains committed to improving its operating performance by increasing efficiency and offering an increasingly complete and competitive product portfolio, alongside the expansion of its business network.

Esautomotion's strong customer loyalty is a key feature in a market characterized by cyclical dynamics that can lead to periods of contraction. In this scenario, the Group continues to focus on

developing new markets and acquiring new customers, with the aim of strengthening its competitive positioning and ensuring it is in a more solid position when economic conditions improve.

COMMUNICATION OF DATA FOR THE FIRST QUARTER OF 2026

As already communicated in the Financial Calendar, on 14 May 2026 the unaudited figures of Operating Revenues and Net Financial Position, consolidated as at 31 March 2026, will be published.

SHAREHOLDERS' MEETING

The Board of Directors has mandated the Chairman to convene the Ordinary Shareholders' Meeting for **22 April 2026**, at **11.00 a.m.**, conventionally at the Company's Registered Office in Via della Meccanica, no. 23/1 – 41012 Carpi (MO), with the following agenda for the ordinary meeting:

- Approval of the Individual Financial Statements of Esautomotion S.p.A. as at 31 December 2025. Related and consequent resolutions. Presentation of the consolidated financial statements of the Esautomotion Group as at 31 December 2025.
- Allocation of profit for the year. Related and consequent resolutions.

The Board of Directors resolved to propose to the Ordinary Shareholders' Meeting the following allocation of the profit for the year of Esautomotion S.p.A., amounting to Euro 1,546,208.65:

- Euro 1,546,208.65 to the Retained Earnings Reserve.

For further information, please refer to the notice of call and the documentation supporting the proposed resolutions, which will be published and made available to the Company's shareholders, in compliance with the applicable legal and statutory provisions, on 7 April 2026, on the www.esautomotion.it website, in the "*Investor Relations/Shareholders' Meeting*" section.

With reference to the accounting data presented in this press release, it should be noted that these are data for which the statutory audit activity has not been completed by the Independent Auditors.

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The Consolidated Financial Statements and the Financial Statements will be made available to the public, in compliance with the terms provided for by law, on the [website http://www.esautomotion.it](http://www.esautomotion.it).

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Esautomotion Group Results as at 31 December 2025 – IAS/IFRS Consolidated Profit & Loss Statement

PROFIT & LOSS	31-dec-25		31-dec-24		Changes	
	Thousands Euro					
Net Sales Revenues	29.732	99,1%	26.970	99,3%	2.762	10,2%
Other Revenues	267	0,9%	198	0,7%	69	35,0%
TURNOVER	29.999	100,0%	27.167	100,0%	2.832	10,4%
Cost of Goods Sold	(14.441)	(48,1%)	(13.409)	(49,4%)	(1.032)	7,7%
Personnel Costs	(4.493)	(15,0%)	(4.295)	(15,8%)	(198)	4,6%
Services	(4.946)	(16,5%)	(5.221)	(19,2%)	275	(5,3%)
Other Costs	(314)	(1,0%)	(284)	(1,0%)	(30)	10,7%
OPERATIVE COSTS	(24.194)	(80,6%)	(23.209)	(85,4%)	(985)	4,2%
EBITDA	5.805	19,4%	3.958	14,6%	1.847	46,7%
Depreciation and Amortization	(2.753)	(9,2%)	(2.364)	(8,7%)	(389)	16,5%
EBIT	3.052	10,2%	1.594	5,9%	1.458	91,4%
Financial Incomes (Costs)	(345)	(1,2%)	(361)	(1,3%)	16	(4,4%)
EBT	2.707	9,0%	1.233	4,5%	1.474	> 100%
Tax	(503)	(1,7%)	(365)	(1,3%)	(138)	37,9%
NET PROFIT (LOSS)	2.204	7,3%	868	3,2%	1.336	> 100%

Esautomotion Group Results as at 31 December 2025 – IAS/IFRS Consolidated Balance Sheet

BALANCE SHEET		31-dec-25	31-dec-24	Changes
Thousands Euro				
	Goodwill	2.737	2.737	-
	Intangible Assets	2.362	2.543	(181)
	Tangible Assets	2.939	2.723	216
	Rights of use	1.971	929	1.042
	Other non current assets	1	1	-
A	Non Current Assets	10.010	8.934	1.076
	Inventory	10.902	12.273	(1.371)
	Trade Credits	9.032	8.757	275
	Accounts payable	(3.374)	(4.004)	630
	OPERATING WORKING CAPITAL	16.560	17.026	(466)
	Other current assets	1.162	940	222
	Other current debts	(956)	(1.022)	66
B	Net Working Capital	16.766	16.945	(179)
	Severance pay	(366)	(339)	(27)
	Funds for risk and charges	(87)	(87)	-
C	Total Funds	(453)	(426)	(27)
D=A+B+C	Net Invested Capital	26.323	25.452	871
E	Assets held for sale	-	-	-
F=D+E	Total Net Invested Capital	26.323	25.452	871
	Share Capital	2.000	2.000	-
	Accumulated profit and reserves	29.947	27.915	2.032
	Minority interest	213	216	(3)
G	Total Equity	32.160	30.131	2.029
	Long term financial Debts	5.342	4.198	1.144
	Short term financial Debts	389	506	(117)
	Financial credits	(2.500)	-	(2.500)
	Cash and Bank Deposits	(9.068)	(9.382)	314
H	Net Financial Position	(5.837)	(4.679)	(1.158)
I=G+H	Total Sources	26.323	25.452	871

Esautomotion Group Results as at 31 December 2025 – IAS/IFRS Consolidated Cash Flow Statement

CASH FLOW STATEMENT	31-dec-25	31-dec-24
	Thousands Euro	
Net Profit (Loss)	2.204	868
Corporate Income Taxes	503	365
Financial Costs (Income) & Exchange gains (losses)	345	361
Offset in working capital	271	40
Provisions	61	48
Depreciation	2.446	2.268
Cash flow from operation before changes in NWC	5.830	3.951
Changes in NWC	(725)	1.459
Cash flow after changes in NWC	5.105	5.410
Financial Costs paid	(8)	(20)
Taxes paid	(250)	(774)
Operating cash flow	4.847	4.616
CAPEX	(3.513)	(2.937)
Loan disbursement (repayment)	1.027	245
investment in financial assets	(2.500)	-
Share Buyback	-	-
Changes in Equity	(175)	143
Dividends paid	-	(645)
Financial Changes	(1.648)	(256)
Changes in Liquidity	(314)	1.423
Cash beginning of the year	9.382	7.959
Cash at the end of the period	9.068	9.382

Esautomotion Spa Results as of December 31, 2025 – Income Statement ITA/GAAP

PROFIT & LOSS	31-dec-25		31-dec-24		Changes	
	Thousands Euro					
Revenues	19.968	100,7%	18.481	101,2%	1.487	8,0%
Change in semi-finished and finished products	(931)	(4,7%)	(917)	(5,0%)	(14)	1,5%
Other revenues and services	785	4,0%	701	3,8%	84	12,0%
Total production value	19.822	100,0%	18.265	100,0%	1.557	8,5%
Subsidiary and consumer raw materials	(10.123)	(51,1%)	(9.059)	(49,6%)	(1.064)	11,7%
Costs for Services	(3.189)	(16,1%)	(3.431)	(18,8%)	242	(7,1%)
Costs for use of third-party assets	(436)	(2,2%)	(277)	(1,5%)	(159)	57,4%
Personnel costs	(3.536)	(17,8%)	(3.449)	(18,9%)	(87)	2,5%
Amortization, depreciation and write-downs	(1.191)	(6,0%)	(1.040)	(5,7%)	(151)	14,5%
Change in inventories of raw materials	478	2,4%	(54)	(0,3%)	532	(985,2%)
Other Costs	(185)	(0,9%)	(164)	(0,9%)	(21)	12,8%
Total Production Costs	(18.182)	(91,7%)	(17.474)	(95,7%)	(708)	4,1%
Difference between value and production costs	1.640	8,3%	791	4,3%	849	> 100%
Total income and (financial) charges	(22)	(0,1%)	428	2,3%	(450)	(105,1%)
Result before the taxes	1.618	8,2%	1.219	6,7%	399	32,7%
Taxes	(72)	(0,4%)	(9)	-	(63)	> 100%
Profit (loss) for the year	1.546	7,8%	1.210	6,6%	336	27,8%

Esautomotion Spa Results as at 31 December 2025 – Balance Sheet ITA/GAAP

BALANCE SHEET		31-dec-25	31-dec-24	Changes
Thousands Euro				
	Goodwill	40	46	(6)
	Intangible assets	503	852	(349)
	Tangible fixed assets	218	513	(295)
	Investments	1	1	-
	Participation in subsidiaries	6.997	6.996	1
	Long-term loans	181	178	3
A	Fixed Assets	7.940	8.586	(646)
	Inventories	6.992	7.702	(710)
	Trade Receivables	6.453	7.022	(569)
	Trade Receivables to subsidiaries	1.881	1.698	183
	Tax credits	751	897	(146)
	Prepaid taxes	266	209	57
	Other credits	218	189	29
	Financial assets	2.500	-	2.500
	Cash on hand	7.112	6.519	593
B	Current Assets	26.173	24.236	1.937
C	Prepayments and accrued income	445	85	360
D=A+B+C	TOTAL ASSETS	34.558	32.907	1.651
	Share Capital	2.000	2.000	-
	Reserves, Retained Earnings	25.189	23.978	1.211
	Net Profit of the year	1.546	1.210	336
E	Equity	28.735	27.188	1.547
	Provisions for risks and charges	87	87	-
	TFR	320	322	(2)
	Long Term Financial Debt	210	76	134
	Short Term Financial Debt	34	34	-
	Prepayment received	15	18	(3)
	Trade Payable	2.437	3.108	(671)
	Trade Payable to subsidiaries	1.704	994	710
	Tax payables	174	185	(11)
	Social security institutions	206	204	2
	Other debts	588	621	(33)
F	Total Debts and Funds	5.775	5.649	126
G	Accrued expenses and deferred income	48	70	(22)
H=E+F	TOTAL LIABILITIES	34.558	32.907	1.651

Results of Esautomotion Spa as of December 31, 2025 – ITA/GAAP Cash Flow Statement

CASH FLOW STATEMENT	31-dec-25	31-dec-24
Thousands Euro		
Net Profit (Loss)	1.546	1.210
Corporate Income Taxes	72	9
Financial Costs (Income)	22	55
Dividends and capital gains	-	(483)
Provisions & others	641	231
Depreciation	943	1.010
Cash flow from operation before changes in NWC	3.224	2.032
Changes in NWC	448	133
Cash flow after changes in NWC	3.672	2.165
Financial Costs paid	(36)	(55)
Taxes paid	-	-
Dividends cashed	-	483
(Use of funds)	(185)	(119)
Operating cash flow	3.451	2.474
CAPEX	(493)	(528)
Loan disbursement (repayment)	135	(33)
investment in financial assets	(2.500)	-
Share Buyback	-	-
Dividends paid	-	(645)
Financial Changes	(2.365)	(678)
Changes in Liquidity	593	1.268
Cash beginning of the year	6.519	5.251
Cash at the end of the period	7.112	6.519

ISIN code: IT0005337107

Ticker: ESAU

For the dissemination of regulated information, the Issuer uses the *eMarket SDIR circuit* managed by Teleborsa

For more information

Contact Euronext Growth Adviser

Illimity Bank S.p.A. | esautomotion@furstenberg.eu

Contatti Investor Relations

Franco Fontana | franco.fontana@esautomotion.com

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