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Oggetto	:	Publication of the Half-Year Financial Statement as of 30 June 2026

Testo del comunicato

Vedi allegato

PRESS RELEASE

Esautomotion approves the Consolidated Half-Year Financial Report as at 30 June 2026

- **TOTAL REVENUES**: € 13,702 thousand vs. € 15,220 thousand (-10.0%)
- **EBITDA**: € 2,794 thousand vs. € 2,722 thousand (+2.6%)
- **EBITDA**: margin 20.4% vs. 17.9% Q1 2025
- **EBIT**: € 1,586 thousand vs. € 1,389 thousand (+14.2%)
- **EBIT margin**: 11.6% vs. 9.1% in H1 2025,
- **NET PROFIT** : € 1,006 thousand vs. € 739 thousand (+36.21%) 1H2025
- **NET PROFIT** MARGIN: 7.3% vs. 4.985% Q 2025
- **OPERATING CASH FLOW**: € 2,160 thousand vs. € 1,085 1H2025
- **NET FINANCIAL POSITION**: Euro - 6,782 million (positive cash) vs. Euro -5,837 million as of December 31, 2025. + 946,000 positive cash generated in 1H2026
- **SHAREHOLDERS' EQUITY:** € 33,591 thousand, including the profit for the period of € 1,006 thousand.
- **TREASURY SHARES HELD BY NO. 213,000**

Commentato [GD1]: 946k, as also reported in the balance sheet

Carpi, 25 September 2026

The Board of Directors of Esautomotion S.p.A. ("**Esautomotion**" 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 Half-Year Financial Report as at 30 June 2026 (the "**Report**").

REPORT: MAIN CONSOLIDATED RESULTS AS AT 30 JUNE 2026

In summary, while recording a 10.0% decrease in total revenues compared to 1H25, Esautomotion achieved an improvement in all key economic indicators. The company also increased operational efficiency and expanded its global customer base, confirming the validity of the initiatives undertaken to support future growth.

The Group's Total Revenues, amounting to € 13,702 thousand, decreased by approximately -10.0**% compared to the first half of 2025.**

This result is considered positive because:

- achieved despite the persistence of unfavorable factors in the world market geopolitical uncertainty that heavily reduces the propensity to invest in industrial durable goods where many markets show significant weakness in demand,
- geopolitical instability of the period, unpredictability in some areas, trade blocs, real or feared effects of US tariffs, competitive pressures from China;

these factors have led to a certain stagnation in our historical customer base who are often leaders in their market and generally retrace more in the negative cycle (and resume vigorously in the cycle reversal) and remain on average below the production levels of 2023, 2024 and 2025.

Esautomotion has:

1. innovated the range of products
2. added new Customers
3. launched two strategic partnerships (China and USA) with complementary Leader operators that lead to the development of new commercial and/or product lines
4. A subsidiary in India has been opened for the development of a market with high growth potential
5. worked profitably on product margins with cost reduction and shift towards higher value-added configurations
6. set up a plan for a reduction in working capital that has become excessive due to semiconductor disruptions and unpredictable demand
7. strengthened the position of the subsidiary Sangalli Servomotori with strategic partnerships, expanded the product range also in areas of innovative development and automation extra Numerical Control in Europe.

The customer base of the automation areas served is growing, although not yet able to fully compensate for the cyclical downturn. As in the past, we expect significant growth in cyclical markets as uncertainty factors ease.

EBITDA, amounting to € 2,794 thousand, increased by 2.6% compared to 1H2025

The **EBITDA MARGIN,** at 20.4%, increased by 2.5 percentage points compared to 1H2025

NET PROFIT, amounting to € 1,006 thousand, increased by 36.21% compared to 1H2025.

The **NET FINANCIAL POSITION** amounted to € -6,782 m.ni (POSITIVE CASH), in the first half of 2026 cash was generated for € 946,000.

The share of direct *exports* is about 48%, to which must be added the share of products sold in Italy that are subsequently exported, making **the total *export* share estimated** at **70-75%.**

The strategy of

- reduction of the cost of products;
- reduction in the use of working capital;
- development of *product performance*, particularly in strategic market applications (sheet metal, marble, wood processing);

- expansion of the offer to various complementary applications and to motors and drives;
- internationalization worldwide, in particular in China, Turkey, Germany and North America, India
- development by external lines through the subsidiary Sangalli Servomotori;
- development of partnerships with strategic companies, in particular the USA and China

R&D remains the Group's largest investment area. Research and development activities continued in the first half of 2026, mainly aimed at integrating the following areas:

- New Intel Core Product Line, Adding to the ARM Line
- different mechatronic technologies with extensive application in the market;
- development of communication logics 4.0, 5.0 and *networking*;
- increase in the flexibility characteristics of the product to react quickly to market fluctuations;
- development and integration of new devices, sensors, components;
- development of new *hardware* to deal with the *shortage* of materials by making critical components less specific (as many alternative suppliers as possible);
- improvement of the energy efficiency of machines using Esautomotion CNC;
- study of elements of 3D graphics
- hybrid technologies;
- multifunction machines for increased productivity;
- integrations with CAD/CAM programs.
- integration of AI elements

These activities have allowed Esautomotion to continue the development of *software* and new integrated devices according to the principles of *Industry* 4.0, Industry 5.0 and AI as well as to consolidate the performance of existing products in new application sectors.

Outlook for the past 30 months: Order intake in the past 30 months appears constant with fluctuations in a range of 10% of turnover. This figure does not indicate stagnation, but hides a strong dynamism characterized by:

1. no significant customer has been lost: but the number of machine orders that customers receive from the market is reduced due to the uncertain economic situation.
2. it continued to acquire new customers by offering advanced technological solutions, covering areas of the developing world, expanding the worldwide network of dealers and agents who offer solutions with CNC Esautomotion to end buyers of machines, developing two important partnerships (China and USA) that will start giving new orders in 2027

3. The company has never stopped reacting to possible fluctuations in demand by intensifying its

activities aimed at increasing market share through:

- technological innovation, to encourage the turnover of the machine fleet in countries where automation is already widespread, and to affirm through high *performance* the customers of the countries that are most backward in the percentage of CNC machines compared to manual ones;
- ability to attract in areas with high automation development (China, Turkey *in the first place* but also new possible destinations deriving from *decoupling* such as India and South America), through our high level of service and competitiveness even in the less advanced product ranges, but with high volumes, in consideration of the speed with which these markets migrate by emulation to the most advanced technologies
- development in *reshoring areas*, particularly in the United States;
- expansion of the product/service offering: the acquisition of the company **Sangalli Servomotori S.r.l.** , carried out in July 2023, as well as integrating a strategic supplier (32% of its production is already purchased by Esautomotion) after the Group's offer to new and promising market areas.

Gianni Senzolo, **CEO of Esautomotion commented on the results:** *"We are ready to "row" against the tide as long as uncertainty dominates the markets, but above all we are prepared to seize the opportunities that the market will give when the cycle begins to improve, we have continued to invest for the future and to make our organization more efficient"*

Franco Fontana, Chairman of Esautomotion commented: *In summary, although despite a 9.9% reduction in revenues from Revenues on 1H25, all other economic and financial parameters are positive in percentage and absolute value. Esautomotion has improved business efficiency and expanded its worldwide customer base, preparing for future growth.*

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The Report, together with the certification of the independent auditors that will be issued in the coming days, will be made available to the public, in compliance with the terms provided for by law, on the http://www.esautomotion.it website.

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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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*Esautomotion Group Results as at 30 June 2026 – **IAS/IFRS Consolidated Income Statement***

INCOME STATEMENT	30 Jun 26		30 Jun 25		Change	
Thousands of Euro						
Revenue	13.531	98,8%	15.092	99,2%	(1.561)	(10,3%)
Other revenues and services	171	1,2%	127	0,8%	44	34,3%
Total Total Revenues	**13.702**	**100,0%**	**15.220**	**100,0%**	**(1.518)**	**(10,0%)**
Δ % YoY	*- 10,0%*					
Purchase of goods & change in inventories	(5.772)	(42,1%)	(7.686)	(50,5%)	1.914	(24,9%)
Personnel Costs	(2.374)	(17,3%)	(2.260)	(14,8%)	(114)	5,1%
Costs for Services	(2.500)	(18,2%)	(2.419)	(15,9%)	(80)	3,3%
Other Costs	(263)	(1,9%)	(132)	(0,9%)	(130)	98,2%
Total Operating Costs	**(10.908)**	**(79,6%)**	**(12.498)**	**(82,1%)**	**1.589**	**(12,7%)**
Δ % YoY	*- 12,7%*					
EBITDA	**2.794**	**20,4%**	**2.722**	**17,9%**	**72**	**2,6%**
Δ % YoY	*+ 2,6%*					
Depreciation, amortisation and provisions	(1.208)	(8,8%)	(1.333)	(8,8%)	125	(9,4%)
EBIT	**1.586**	**11,6%**	**1.389**	**9,1%**	**197**	**14,2%**
Δ % YoY	*+ 14,2%*					
Financial income (expenses)	(298)	(2,2%)	(268)	(1,8%)	(30)	11,1%
EBT	**1.287**	**9,4%**	**1.120**	**7,4%**	**167**	**14,9%**
Taxes	(281)	(2,1%)	(381)	(2,5%)	100	(26,3%)
NET PROFIT (LOSS)	**1.006**	**7,3%**	**739**	**4,9%**	**267**	**36,2%**
Δ % YoY	*+ 36,2%*					

*Esautomotion Group Results as at 30 June 2026 – **IAS/IFRS Consolidated Balance Sheet***

	RECLASSIFIED BALANCE SHEET	30 Jun 26	31 Dec 25	Change
	Thousands of Euro			
	Start-up	2.737	2.737	-
	Intangible assets	2.564	2.362	202
	Tangible fixed assets	3.069	2.939	130
	Rights of use on fixed assets	1.810	1.971	(161)
	Other non-current assets	1	1	0
A	**Total Fixed Assets**	**10.181**	**10.010**	**171**
	Inventories	11.819	10.902	917
	Trade Receivables	8.074	9.032	(958)
	Trade payables	(3.036)	(3.374)	338
	Debts vs Social Security Institutions	(194)	(265)	71
	Other Activities	693	577	116
	Other payables	(1.012)	(691)	(321)
	Payables and receivables for current taxes and deferred taxation	678	585	92
B	**Total Other Assets and Liabilities**	**17.023**	**16.768**	**255**
	Severance pay	(307)	(366)	59
	Provisions for Risks and Charges	(87)	(87)	-
C	**Total Funds**	**(394)**	**(453)**	**59**
D=A+B+C	**Net Invested Capital**	**26.809**	**26.324**	**485**
E	**Assets held for sale**	**-**	**-**	**-**
F=D+E	**Total net invested capital**	**26.809**	**26.324**	**485**
	Share Capital	2.000	2.000	-
	Reserves, Results to New	31.379	29.947	1.432
	Minority interests	212	213	(1)
G	**Net Worth**	**33.591**	**32.161**	**1.431**
	Financial debt at m/l Term	5.211	5.342	(131)
	Short-term financial debt	311	389	(78)
	Financial Assets and Cash and Cash Equivalents	(12.304)	(11.567)	(737)
H	**Net Financial Position**	**(6.782)**	**(5.836)**	**(946)**
I=G+H	**Equity and Debt**	**26.809**	**26.324**	**485**

Esautomotion Group Results as at 30 June 2026 – ***Consolidated Cash Flow Statement***
IAS/IFRS

CASH FLOW STATEMENT	30-Jun-26	30-Jun-25
€ thousand		
Profit (loss) for the year	1.006	739
Income taxes	281	381
Interest expense/(income) and foreign exchange differences	298	268
Adjustments for non-cash items that did not have an impact on net working capital	26	248
Provisions	- 28	- 3
Depreciation and amortisation	1.169	1.074
Cash flow before changes in net working capital	**2.753**	**2.707**
Total changes in net working capital	**172**	**-1.473**
Cash flow after changes in net working capital	**2.925**	**1.234**
Interest received/(paid)	- 2	- 7
Income taxes paid	- 88	- 191
Cash flow from operating activities (A)	**2.835**	**1.036**
Cash flow from investing activities (B)	**-1.106**	**-4.876**
Repayment of borrowings, including leases	-200	1.159
Capital increase for cash	-	-
Purchase of treasury shares	-	-
Changes in shareholders' equity	1848	-273
Dividends and interim dividends paid	-	-
Cash flow from financing activities (C)	**1.648**	**886**
Increase (decrease) in cash and cash equivalents (A ± B ± C)	***3.377***	***-2.954***
Cash and cash equivalents at beginning of period	6.428	9.382
Cash and cash equivalents at end of period	9.804	6.428

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For the dissemination of regulated information, the Issuer uses the *eMarket SDIR circuit* managed by Teleborsa S.r.l.
For more information

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