



2025 RESULTS PRESENTATION

1 April 2026

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Agenda

- ❑ **Company at a Glance**
- ❑ **2025 Results & Outlook**
- ❑ **Achievements**
- ❑ **Sustainability**
- ❑ **Appendix**
 - **Market & Competitive Positioning**
 - **Business Overview**
 - **Financials**



Marzocchi Pompe at a glance: world leader in top-performing products

Company

Marzocchi Pompe is a **leading world player in the design, production and marketing of high-performance external gear pumps and motors**, which are used in sectors like: industrial (textile machines, machine tools, plastic injection machines, medical equipment, energy, etc.), mobile (agricultural machines, forklift trucks, etc.) and automotive (transmissions, power steering, attitude adjusters,..)

Key Success Factors

Marzocchi Pompe boasts a **wide range of products** well known for its **high performance and great reliability**, covering most of the market needs in terms of displacements and interfacing

A key feature is the **continuous investment in R&D** aimed at satisfying the customer demand for high performance products

The **production** of the historical brand «Marzocchi Pompe» is **entirely carried out in Italy**, in two locations **nearby Bologna**: Zola Predosa and Casalecchio di Reno, through an extremely verticalized process that allows to keep the product quality under control

Main Consolidated Financials

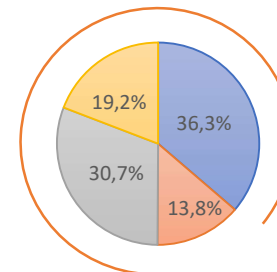
€/000	2022	2023	2024	2025
Net Sales	48.513	49.746	40.038	37.138
EBITDA Adjusted *	7.557	8.101	3.635	3.463
EBITDA Adj. Margin *	15,4%	16,4%	9,45%	9,45%
Net Income	1.962	3.006	0.329	(0.546)
Net Equity	21.400	22.932	21.880	20.930
Net Financial Debt **	7.848	5.335	5.769	7.752

2025 KPI

- About 0,5 mln pumps produced in 2025
- More than 800 active clients
- Employees at end-2025: 214

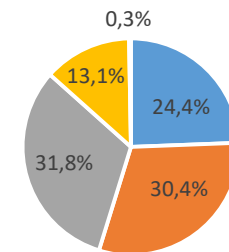
* 2025 EBITDA Adj. Net of Not Recurring Costs, Margin on Sales Revenue+WTP
 ** 2025 NFP Adjusted: Net of € 2.7 €m of 3M, 6M term bank savings deposits

2025 Revenues by Business Line



Core Market

2025 Revenues by Geographic Area



■ Sales Network ■ Automotive ■ Industrial ■ Mobile ■ AMERICA ■ EUROPE ■ ITALY ■ ASIA ■ RoW

Strategy

Marzocchi Pompe aims to continue to:

- **upgrade production facility** to expand capacity and improve efficiency → widening/rationalisation of Zola Predosa plant is underway
- **invest in R&D** to enlarge its product range, strengthening its market leadership → new Elika modular and reversible pumps and motors
- **increase penetration on Mobile and Industrial** applications such as the forklift trucks (mobile) and plastic injection machines (ind.)
- **develop innovative products for the Automotive market**, as witnessed by the important award from a leading world player

Shareholders & Management: full alignment of interest

TOP MANAGEMENT

Paolo MARZOCCHI

*Main Shareholder,
Executive Chairman*



Gabriele BONFIGLIOLI
CEO e General Manager



BOARD OF DIRECTORS

Paolo MARZOCCHI

Executive Chairman

Carlo MARZOCCHI TABACCHI

Deputy Chairman

Gabriele BONFIGLIOLI

CEO

Franco ROSSI

Board Member

Valentina CAMORANI SCARPA

Board Member

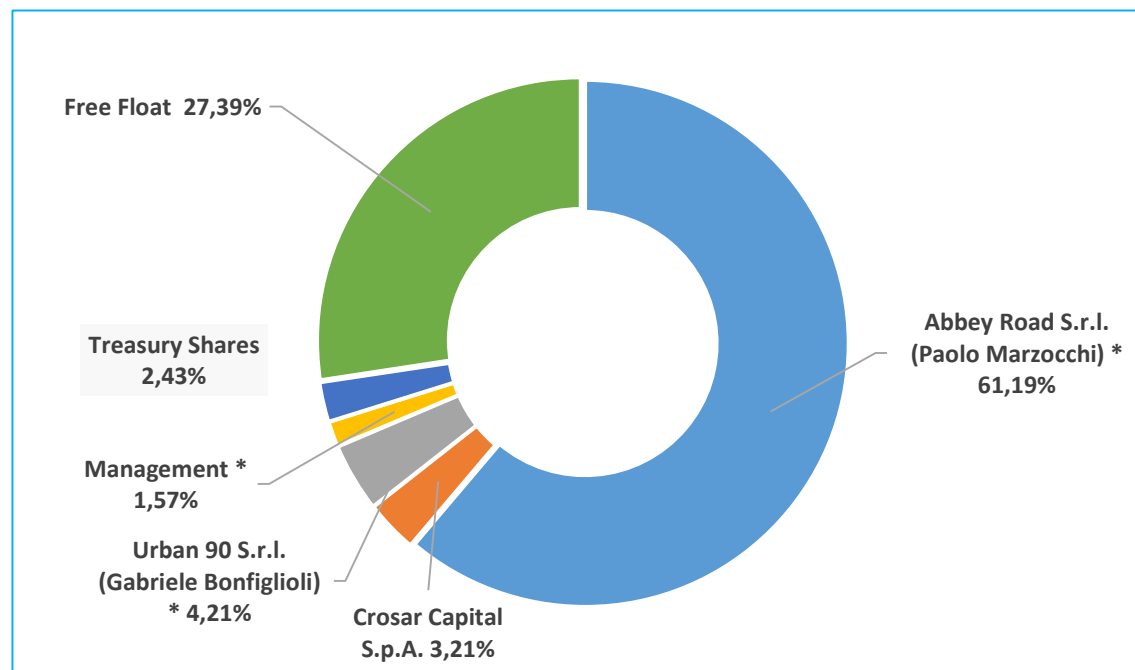
Matteo TAMBURINI

Board Member

Giuseppe ZOTTOLI

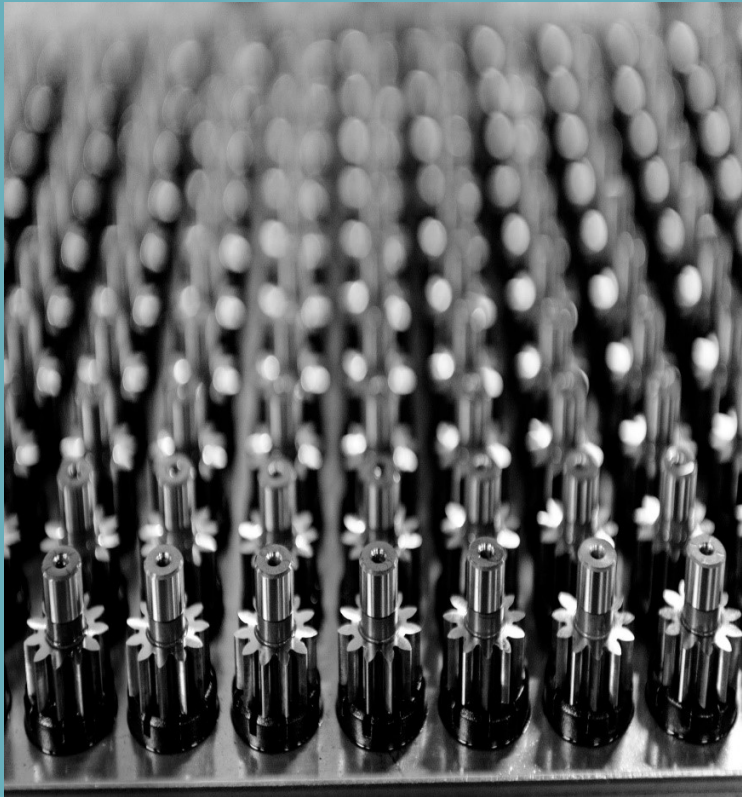
Independent Board Member

SHAREHOLDERS



*) Parasocial agreement renewed until 30 June 2026

Note: Data as of 27 March 2026



2025 Results

2025: Marzocchi is competing successfully in very challenging markets

MARKET SCENARIO

- **WEAK GLOBAL DEMAND, VERY VOLATILE MARKETS**
- **Customers' need for High-Performing & Customized products**

Actions



MARZOCCHI POMPE ANSWER

- New patented products i.e. ELIKA Modular & Reversible Pumps and Motors
- Focus on Co-Design with customers
- Scouting New Markets by participating to leading International Trade Fairs

MARZOCCHI RELENTLESS INVESTMENTS FOR FUTURE GROWTH AND VALUE CREATION

- **Need to Streamline the company structure to gain more efficiency and flexibility...**

...also Leveraging on traditionally Strong Financial Structure and proven Investment capacity

Key Steps
for Growth



- Fixed Costs Reduction (22 Early exits)
- Two New Assembly & Testing Lines at the Zola Predosa plant in June 2025
- Migration of Casalecchio operations to Zola Predosa that is to become the sole logistics & production site of Marzocchi

2025 Results: Flexibility and Investments are key competitive strenghts

➤ NET SALES AT € 37.1 M, -7.2% on 2024, IN LINE WITH INDUSTRY TREND

- THE CORE BUSINESS SALES WERE € 32.0 M IN 2025, DOWN 5.9% Y-O-Y, HOWEVER SHOWING A 3.3% Y-O-Y INCREASE IN 2H 2025
- THE AUTOMOTIVE SALES AT € 5.1 M, -14.9%, WERE HIT BY THE GLOBAL CRISI COMBINED WITH END LIFECYCLE OF KEY PRODUCTS

➤ EBITDA MARGIN ADJ. AT 9.45% (stable on 2024), ADJ. FOR EXTRA COSTS FOR PERSONNEL REDUCTION

- MARZOCCHI WAS ABLE TO DEFEND OPERATING MARGINS IN THE TOUGHEST TIMES EVER THANKS TO ITS RELENTLES EFFORTS TO IMPROVE EFFICIENCY
- ADJUSTED EBITDA WAS RESTATED FOR THE EXTRA PROVISIONS FOR LAYOFFS (22 WORKERS ON A VOLUNTARY BASIS) AMOUNTING TO ABOUT € 1 M

➤ ADJUSTED NET FINANCIAL POSITION (DEBT) AT € 7.7 M (vs. € 5.8 M at END-2024)

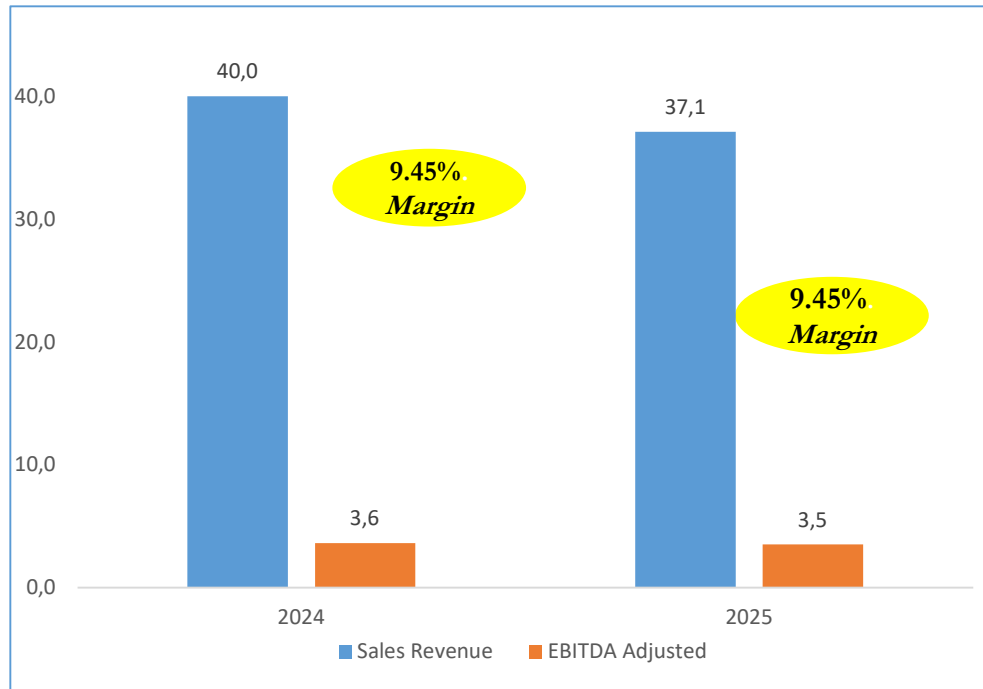
- DEBT INCREASE WAS DRIVEN BY A) INVESTMENTS TO IMPLEMENT THE TWO NEW ASSEMBLY AND TESTING LINES FOR THE ELIKA 1 AND ELIKA 2 PUMP WITHIN THE RATIONALIZATION PROCESS AT THE ZOLA PREDOSA PLANT TARGETING TO IMPROVE EFFICIENCY IN PRODUCTION AND LOGISTICS ON A LONG TERM BASIS; AND B) THE APPROXIMATELY €1 MILLION EXTRA CASH OUTLAY INCURRED IN THE SECOND HALF, RELATED TO THE WORKFORCE REDUCTION PROCEDURE INITIATED AND COMPLETED BY THE COMPANY DURING THE YEAR

➤ MARZOCCHI POMPE KEEPS ON INVESTING TO FURTHER GAIN COMPETITIVENESS AND MARKET SHARES

- IN 2025 MARZOCCHI LAUNCHED NEW HIGH-PERFORMING PRODUCTS SUCH AS THE NEW ELIKA MOTOR SERIES, AFTER THE ELIKA MODULAR PUMPS
- IN JANUARY 2026 THE COMPANY WAS AWARDED AN IMPORTANT PATENT FOR A BI-DIRECTIONAL ROTATING HYDRAULIC GEAR MACHINE THAT WILL ALLOW TO DEVELOP A NEW FAMILY OF ELIKA PUMPS FEATURING A REVERSIBLE MOVEMENT AND BETTER PERFORMANCE (SMOOTH MOTION, LOW NOISE AND VIBRATIONS), ESPECIALLY TARGETING ELECTRIFICATION-DRIVEN APPLICATIONS IN MANY INDUSTRIES
- IN SUCH A CHALLENGING MARKET BACKDROP, THESE INVESTMENTS PUT THE GROUP IN THE BEST SHAPE TO SEIZE MARKET RECOVERY

Revenues at € 37.1 mln, EBITDA Adj. margin stable at 9.45%

Sales Revenue and EBITDA Adjusted (€m)



* EBITDA Adjusted excluding Not Recurring Costs for Personnel Reduction equal to € 0.96 million

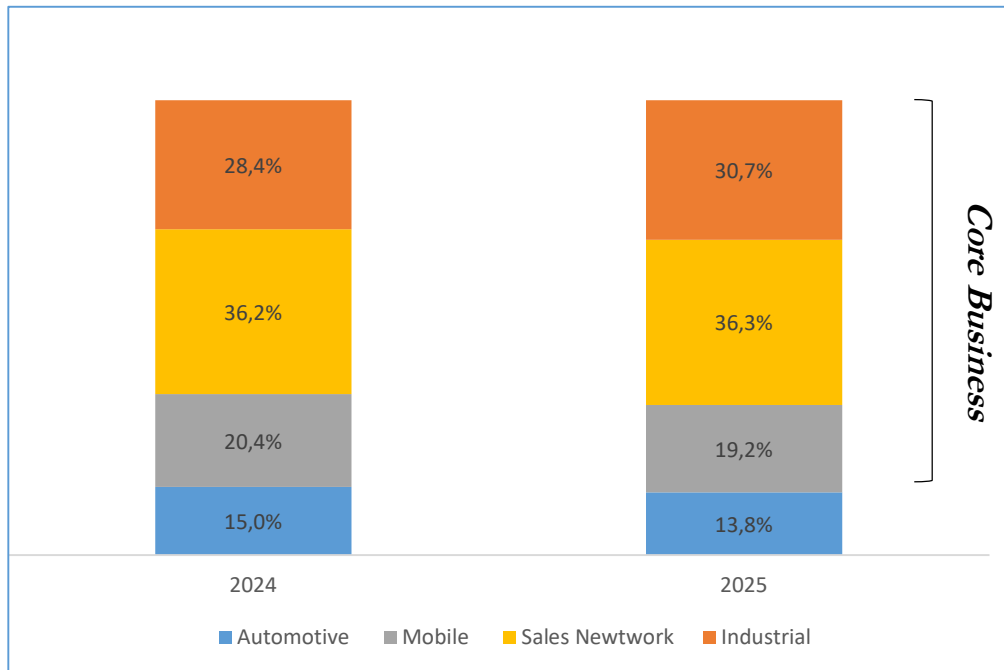
** EBITDA Margin calculated on Sales Revenue + WIP

Source: consolidated financial statements

- **Revenues** were € 37.1 million in 2025, down 7.2% vs. 2024. The decrease was in line with industry trend, affected by sluggish demand especially in **Europe and North America**
- **Core Business** sales stood at € 32,0 million (-5.9%), while **Automotive** sales fell 14.9% to € 5.1 million being affected by the life-cycle of some end-applications while the **new orders will generate positive effects over a longer time span**
- **EBITDA Adjusted** (for € 0.96 million extra costs for redundancies) **remained stable at € 3.5 million**, witnessing Marzocchi Pompe's capability to defend its margins thanks to its product excellence
- **EBITDA Adjusted margin was nicely flat at 9.45%**, a good results achieved in very challenging markets

Core Business at 86.2% of total revenues

Revenue Breakdown

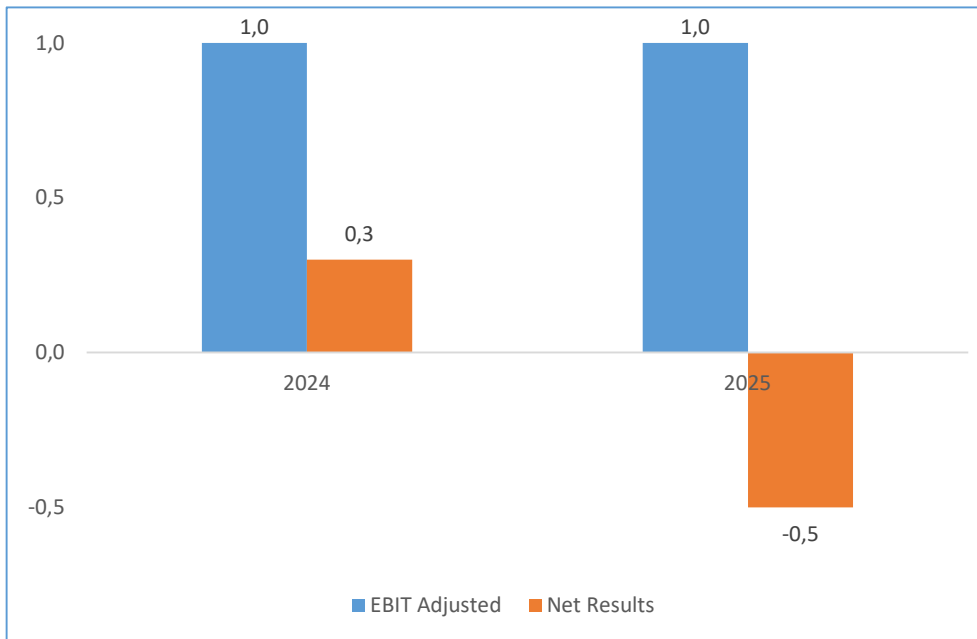


- Revenues by **Core market segments** (Sales Network, Industrial and Mobile) accounted for **86.2% of Total Revenues**, (vs. 85% in 2024), once again witnessing Marzocchi Pompe's distinctive capability to serve clients with very competitive and **high-performing customized products**
- Weight of **Automotive Sales** decreased slightly to **13.8%** (vs. 15% in 2024), as new orders will cash-in in future years

Source: consolidated financial statements

EBIT Adjusted stable, Net Result hit by Extra Costs

EBIT Adjusted and Net Profit (€m)



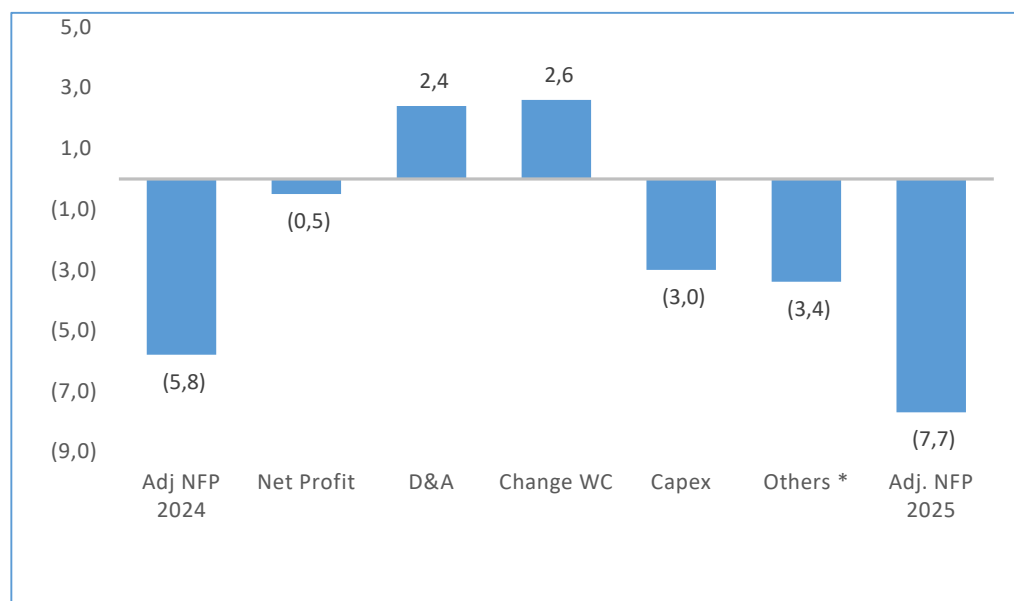
* EBIT Adjusted is Net of € 0.96 million extraordinary costs for personnel redundancies

Source: consolidated financial statements

- **EBIT Adjusted** (calculated net of € 0.96 million extra personnel costs) **remained stable at € 1.0 million** vs. 2024
- In 2025 **Net Result was at loss for € 0.5 million** (vs. a profit of € 0.3 million last year), penalized by the € 2.9 million sales reduction y-o-y and the abovementioned extra costs for personnel redundancies

Net Financial Position supports Marzocchi's investment capability

Adjusted Net Financial Position Evolution (€m)



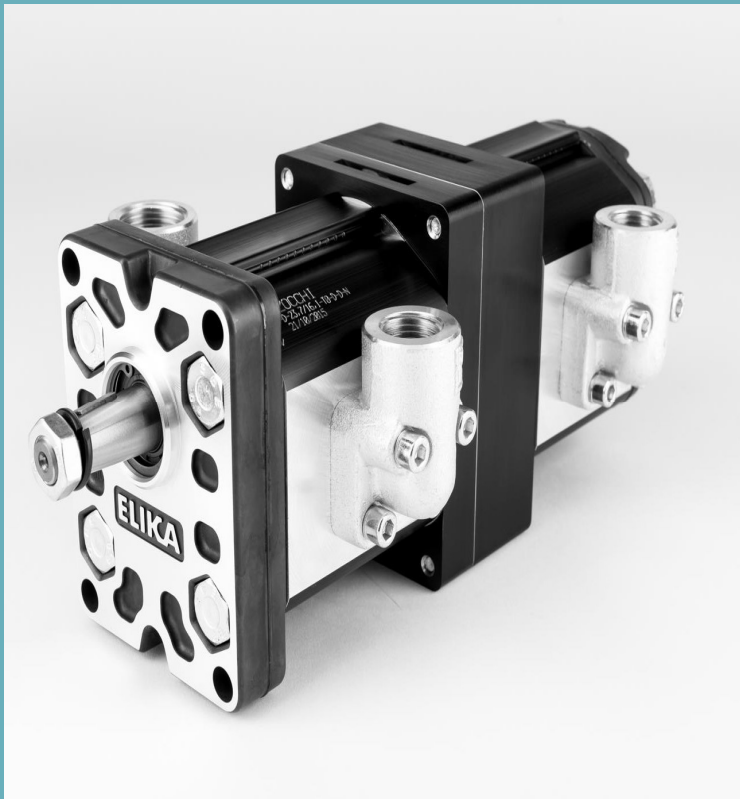
* Others include € 2.7 million of three- and six-month term bank savings deposits split as follows:
 - € 2.0 million of three- and six-month restricted bank deposits made by the Parent Company reclassified under other current assets (C.II.5quarter);
 - \$0.7 million made up of the subsidiary Marzocchi Pumps U.S.A. as of December 31, 2025.

- **Adjusted Net Financial Position** amounted to **€ 7.7 million** at end-2025, up 34% vs. € 5.8 million at end-2024, however flat on June 2025 (€ 7.7 million)
- Adjusted NFP is **net of € 2.7 million** of three- and six-month term bank **savings deposits** (vs. € 5.7 million in 2024) reclassified under other receivables in current assets
- Marzocchi keeps on investing for future growth. **Capex confirmed at 7.8% on Sales**, at € 3.0 million in 2025, only slightly down from € 3.2 million in 2024 (8% on sales)
- **Shareholders' Equity** stood at € 20.9 million, from € 21.9 million in 2024

Source: consolidated financial statements

2025 Dividend proposal of € 6 cents / share

- ON 27TH MARCH 2026 MARZOCCHI POMPE BOARD OF DIRECTORS PROPOSED THE DISTRIBUTION OF AN ORDINARY DIVIDEND OF EURO 6 CENTS PER SHARE (VS. EURO 20 CENTS PER SHARE IN RECORD-YEAR 2023), EXCLUDING TREASURY SHARES HELD IN PORTFOLIO ON THE DIVIDEND ENTITLEMENT DATE, TAKING IT FROM THE EXTRAORDINARY RESERVE, FOR A TOTAL DIVIDEND AMOUNT OF EURO 382.800
- THE DIVIDEND PROPOSAL WAS MADE IN RELATION TO THE CURRENT PERFORMANCE OF THE COMPANY IN RECENT MONTHS AND THE RESULTING OPPORTUNITY TO REWARD SHAREHOLDERS WHO HAVE CONTINUED TO HOLD THE SHARE THROUGHOUT THIS PROLONGED PERIOD OF DIFFICULTY
- IF THE SHAREHOLDERS' MEETING DUE ON 29TH APRIL 2026 APPROVES ITS DISTRIBUTION, THE DIVIDEND WILL BE PAID AS FROM 13H MAY 2026, AFTER DETACHMENT OF THE COUPON ON 11TH MAY 2026
- THE DATE OF ENTITLEMENT TO PAYMENT (RECORD DATE) IS SET AT 12TH MAY 2026

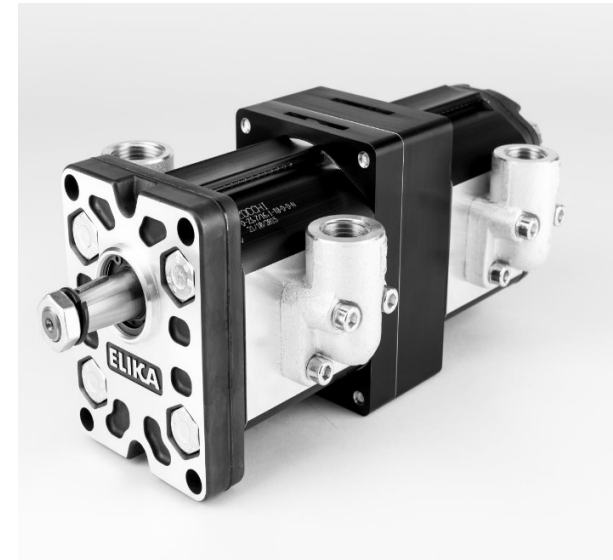


Achievements

ELIKA “Modular”, New Motors boost Marzocchi top-performing products

- IN 2019 THE NEW ELIKA DEPARTMENT WAS COMPLETED THROUGH AN INVESTMENT OF MORE THAN 1 MILLION €S IN THE PRODUCTION SITE OF CASALECCHIO (BO)
- COVERED BY TWO PATENTS, ELIKA IS MARZOCCHI POMPE FLAGSHIP PRODUCT CHARACTERIZED BY LOW NOISE & HIGH EFFICIENCY
- THE PLANNED RANGE EXTENSION WAS BOOSTED BY:
 1. THE NEW “ELIKA 1P” AND “ELIKA K1P” PUMPS, WHICH FURTHER IMPROVE PERFORMANCES IN 2H 2021
 2. THE NEW “FTP – FLUID TRANSMISSION PUMP”, WHICH OPENS UP NEW MARKETS AND THAT WAS PRESENTED IN MARCH 2021 AT THE “VTM” IN TURIN AND IN JUNE AT THE “IVT EXPO” IN COLOGNE
 3. IN AUGUST 2023 THE DEVELOPMENT OF THE ELIKA MODULAR PUMPS HAS BEEN COMPLETED, AND THEY CAN NOW BE SUPPLIED IN SEPARATE ELEMENTS, SO THAT THE CUSTOMER CAN INDEPENDENTLY COMPOSE A MULTIPLE ELIKA PUMP ACCORDING TO HIS SPECIFIC NEEDS
- IN JUNE 2025 MARZOCCHI POMPE LAUNCHED THE NEW ELIKA MOTOR SERIES, WHICH ARE A NATURAL EXTENSION OF THE ELIKA PUMP FAMILY, A PATENTED TECHNOLOGY FEATURING SILENCE, EFFICIENCY AND THAT WITNESS MARZOCCHI INNOVATION FOR THE INDUSTRY

“In 2019 we started investing over 1 million €s for the production of the ELIKA pump in its various versions. We focus on this product, with higher margins than traditional ones, which we believe will be one of our main drivers of growth in the coming years. Also, we continue to invest to launch new products and to increase the efficiency and productivity of our plants.” declared Gabriele Bonfiglioli, CEO of Marzocchi Pompe.



New Patent for Elika Reversible Pumps will drive to New Applications

- IN JANUARY 2026 MARZOCCHI POMPE ANNOUNCED THE GRANTING OF A NEW PATENT FOR THE REVERSIBLE VERSION OF THE ELIKA FAMILY OF PUMPS
- THE PATENT WAS GRANTED BY THE UIBM - ITALIAN PATENT AND TRADEMARK OFFICE OF THE MINISTRY OF ENTERPRISES AND MADE IN ITALY - AND THE EUROPEAN PORTION UNDER EP24711633.8 IS CURRENTLY BEING ISSUED.
- THE STUDIES, SIMULATIONS, PROTOTYPING, AND TESTING THAT LED TO THE DEFINITION OF THE PATENT APPLICATION WERE CONDUCTED BY MARZOCCHI POMPE'S R&D TEAM, WITH LONGSTANDING COLLABORATION FROM THE ENGINEERING DEPARTMENT OF THE UNIVERSITY OF BOLOGNA
- THE INVENTIVE CONCEPT RELATES TO A BILATERAL HYDRAULIC COMPENSATION SYSTEM ENSURING FULL AXIAL FORCE BALANCING ON A REVERSIBLE MACHINE WITH HELICAL-TOOTHED ROTORS FEATURING CONJUGATE PROFILES, WITHOUT FLUID ENTRAPMENT, USABLE BOTH AS A PUMP AND AS A MOTOR OPERATING IN CLOCKWISE OR COUNTERCLOCKWISE ROTATION. THE PROJECT AIMED TO DEVELOP A HYDRAULIC MACHINE THAT IS VERSATILE, EFFICIENT, RELIABLE, COST-EFFECTIVE, AND SIMPLE TO MANUFACTURE.
- THE NEW PATENT WILL ALLOW TO DEVELOP A NEW SUBFAMILY OF ELIKA PUMPS:
 - THE NEW PUMPS WILL NOW BE CAPABLE OF BIDIRECTIONAL OPERATION, THEREFORE REDUCING VIBRATIONS AND NOISE
 - THESE NEW ELIKA PRODUCTS, MARZOCCHI POMPE'S FLAGSHIP FAMILY, EXPAND AND COMPLEMENT AN ALREADY EXTENSIVE PORTFOLIO AND REINFORCE THE GROUP'S GLOBAL POSITIONING



New Warehouse, New Lines in Zola Predosa to improve productivity

ENLARGEMENT & RATIONALIZATION OF PRODUCTION CAPACITY AND LOGISTICS IN ZOLA PREDOSA PLANT

- IN OCTOBER 2022 MARZOCCHI POMPE PURCHASED AN INDUSTRIAL PROPERTY OF APPROX. 4,800 SQUARE METRES (1,800 COVERED), NEXT TO THE ZOLA PREDOSA PLANT FOR A TOTAL AMOUNT OF € 1.15 MILLION. THE NEW BUILDING ALLOWS MARZOCCHI TO INCREASE PRODUCTION CAPACITY AND IMPROVE OPERATIONAL EFFICIENCY
- IN JULY 2023 MARZOCCHI BOUGHT A PROPERTY OF ABOUT 3,100 SQUARE METRES, NEXT TO THE ZOLA PREDOSA PLANT, WHICH ALLOWED THE GROUP TO MOVE SOME SHIPPING WAREHOUSE ACTIVITIES FROM CASALECCHIO IN ORDER TO OPTIMIZE LOGISTICS AND GAIN OPERATIONAL EFFICIENCY
- IN FEBRUARY 2024 MARZOCCHI PURCHASED A 2,500 SQUARE METRES REAL ESTATE (1,000 COVERED), NEXT TO THE ONE CURRENTLY IN USE IN ZOLA PREDOSA. THE NEW BUILDING IS A FURTHER IMPORTANT STEP IN THE PROCESS OF UNIFYING THE TWO PRODUCTION PLANTS IN ZOLA PREDOSA WHICH WILL LEAD TO STRONG EFFICIENCY GAINS
- IN JUNE 2025 MARZOCCHI STARTED UP TWO NEW ASSEMBLY AND TESTING LINES AT THE ZOLA PREDOSA PLANT. THIS IS A FURTHER STRATEGIC MILESTONE AIMED AT BOOSTING OPERATIONAL EFFICIENCY AND SUPPORTING FUTURE EXPANSION. IT WITNESSES THE GROUP'S CONTINUED FOCUS ON INNOVATION DESPITE A CHALLENGING MARKET BACKDROP, REAFFIRM AND ITS DRIVE TO STRENGTHEN COMPETITIVENESS AS MARKET DEMAND BEGINS TO RECOVER.



New Plant with Photovoltaic Panels to combine ESG with cost savings

INSTALLATION OF PHOTOVOLTAIC PANELS ON THE ZOLA PREDOSA PLANT TO ENHANCE MARZOCCHI'S "GREEN" VOCATION AT THE SAME TIME REDUCING CONSISTENTLY ENERGY COSTS

- IN OCTOBER 2024 MARZOCCHI POMPE COMPLETED THE INSTALLATION OF PHOTOVOLTAIC SYSTEM OF 954 KWP IN THE NEW ZOLA PREDOSA PLANT
- THIS INVESTMENT FURTHER ENHANCES MARZOCCHI COMMITMENT TOWARDS SUSTAINABILITY
- IN FACT THE NEW PHOTOVOLTAIC SYSTEM WILL BE ABLE TO GUARANTEE CLEAN ENERGY EQUAL TO MORE THAN A THIRD OF MARZOCCHI'S TOTAL ANNUAL NEEDS, WITH CONSIDERABLE SAVINGS ON ENERGY COSTS
- IN TERMS OF LOWERING THE IMPACT ON THE ENVIRONMENT, MARZOCCHI WILL REDUCE THE EMISSION OF 506 KILOGRAMS/YEAR OF CO2 INTO THE ATMOSPHERE
- MARZOCCHI "GREEN" APPROACH IMPLIES THAT FURTHER EXPANSION OF PRODUCTION CAPACITY IN ZOLA PREDOSA WILL ENTAIL INSTALLATION OF NEW PHOTOVOLTAIC PANELS



"The installation of a photovoltaic system will allow, already in the short term, important energy savings and significant emission reduction, in line with the Group's ESG objectives." declared Gabriele Bonfiglioli, CEO of Marzocchi Pompe.

Marzocchi joins Global Events – 2026: A good mix of Traditional and New..

- ✓ **CONEXPO LAS VEGAS** – 03-07.03.2026
Agricultural Exhibition



- AERO Friedrichshafen 2026** – 22-25.04.2026
Mobile Exhibition



- EIMA Bologna** – 10-14.11.2026
Agricultural Exhibition



- ✓ **BAUMA CHINA SHANGHAI** – 24-27.11.2026
Mobile Exhibition

...as it was 2025 with participations to New and Known world trade fairs

- ✓ **AGRITEK KAZAKHSTAN ASTANA** – 12.03.2025
Agricultural Exhibition



- ✓ **BAUMA MUENCHEN** – 07.04.2025
Mobile Exhibition

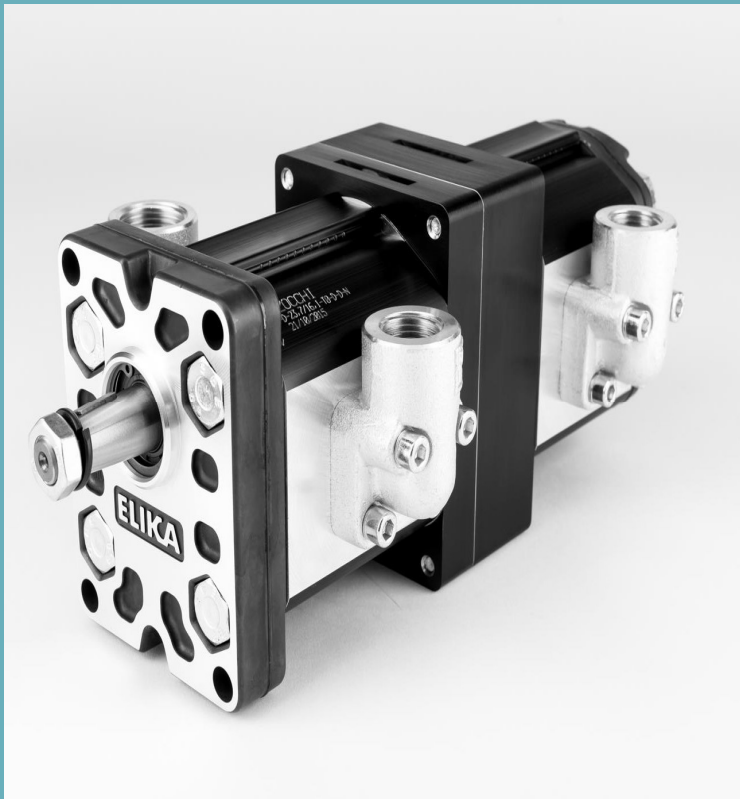
- ✓ **IVT OFF-HIGHWAY EXPO CHICAGO** – 20.08.2025
Mobile Exhibition



- ✓ **POWER TRANSMISSION AND CONTROL ASIA SHANGHAI** – 28.10.2025
Industrial Exhibition

2025 Highlights & Outlook

- **IN 2025, MARZOCCHI POMPE CONFIRMED THE SOLIDITY OF ITS BUSINESS MODEL, DEMONSTRATING GOOD PERFORMANCE DESPITE A GLOBAL CONTEXT CHARACTERIZED BY RECESSIONARY DYNAMICS**
- **KEY STEPS WERE A) TARGETED REORGANIZATION INTERVENTIONS, PARTICULARLY THE RATIONALIZATION OF THE PRODUCTION STRUCTURE, WHICH COMBINED WITH B) MARZOCCHI POMPE PROVEN FINANCIAL SOLIDITY AND ITS CAPABILITY TO GENERATE CASH FLOWS CONSISTENTLY OVER TIME**
- **NOTABLY, REVENUES RECORDED A SIGNIFICANT RECOVERY IN THE FOURTH QUARTER, WITH AN INCREASE OF 11.57% COMPARED TO THE SAME PERIOD OF THE PREVIOUS YEAR (WITH CONSEQUENT POSITIVE EFFECTS ON MARGINS), SHOWING A PROGRESSIVE IMPROVEMENT DURING THE YEAR, WHICH BODES WELL FOR THE FUTURE EVOLUTION OF THE GROUP**
- **THE CONTINUATION OF MARZOCCHI POMPE IMPORTANT INVESTMENT PLAN, AIMED AT IMPROVING PRODUCTION AND LOGISTICS EFFICIENCY, REPRESENTS A FUNDAMENTAL PILLAR TO FURTHER STRENGTHEN THE COMPANY RESILIENCE IN VERY TOUGH MARKETS AND IS THE MOST SOLID FOUNDATION FOR FUTURE GROWTH**
- **THE RISING MARKET INTEREST IN MARZOCCHI POMPE INNOVATIVE AND HIGH-PERFORMANCE PRODUCTS, MOSTLY TAILOR-MADE FOR CUSTOMER NEEDS, CONFIRMS THE VALIDITY OF ITS STRATEGY TO CREATE VALUE ON A LONG-TERM BASIS**
- **IN THE FIRST MONTHS OF 2026 THE LAUNCH OF PATENTED ELIKA REVERSIBLE PUMPS WILL FURTHER STRENGTHEN MARZOCCHI POMPE COMPETITIVE POSITION ON GLOBAL MARKETS**
- **ULTIMATELY, THE RELENTLESS INVESTMENTS IN EFFICIENCY AND INNOVATION PREPARE THE COMPANY TO SEIZE ALL THE OPPORTUNITIES THAT WILL EMERGE AS MARKET DEMAND RECOVERS**



Sustainability

ESG Achievements: Strong commitment towards Sustainability (1/2)

- **First Sustainability Report in 2024** – Marzocchi has carried out an in-depth process of analysis that led to publication in May 2025 of its first Sustainability Report, prepared **on a voluntary basis** according to the **criteria of the European Sustainability Reporting Standards (ESRS)**. This is an effort that further strengthens Marzocchi's commitment to enhance value creation

- **Marzocchi Certifications**



- **ESG Score by**



1.35



1.10



1.38



1.10

4.93 = BBB

In January '24



Adoption of 231 Model
& appointment of
Supervisory Body

Environmental
Policies

Ethic Code

ESG Achievements: Strong commitment towards Sustainability (2/2)

New «Green» Projects

- **Tredom Forest** — In February 2023 Marzocchi launched the creation of the “*Marzocchi Pompe Forest*”, giving away the first 300 trees to its employees
 - This project will not only bring a contribution to carbon dioxide reabsorption but, being composed of fruit trees donated to the local community (in Africa, South America and Asia), it will also have a positive impact for the latter in social terms
 - The size of Marzocchi Forest will be expanded in the years to come
- **Photovoltaic panels** — In 2024 Marzocchi started installation of photovoltaic panels in the new Zola Predosa Plant. This new facility aims at increasing Marzocchi production capacity at the same time improving its operational efficiency
 - The renovation work includes the installation of photovoltaic panels to supply “green energy” to Marzocchi production processes
 - The investment has an estimated payback of 3.5 years



New Security Info Center to implement NIS2 Organizational Model

- In March 2022 Marzocchi Pompe, in partnership with Yarix, finalized a C SOC + Cynet project
- Marzocchi Pompe *Cognitive Security Information Center* C SOC will operate the:
 - H24x7x365 monitoring of company networks
 - Physical and Biometric Security of last generation
- *Cynet* tasks are:
 - Monitoring & Control
 - Attack Prevention & Detection
 - Response Orchestration
- In 2025 Marzocchi Pompe, designated by the National Cybersecurity Agency as an Important Subject, has entrusted the company Altea 365 with the task of preparing a *NIS2 Organizational Model*, not only to comply with a legal obligation but above all to have increasingly adequate measures to prevent, manage and mitigate risks related to IT security





Appendix

- **Market & Competitive Positioning**
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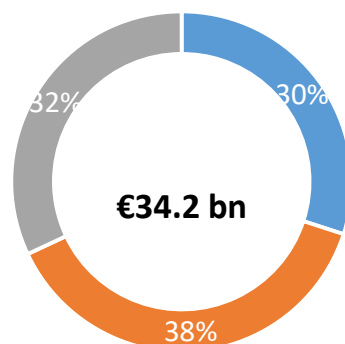
Fluid Power market and growth forecasts

The Fluid Power market is made up by the hydraulic segment and the pneumatic segment. In Asia, Europe and USA the Fluid Power *home*¹ market went from € 25.7 billion in 2000, to € 41.5 billion in 2020 and to 47.3 billion in 2021 of which € 34.2 billion (72%) stemming from the hydraulic sector, and € 13.1 billion (28%) from the pneumatic sector (Source: ISC² – 2021 – International Fluid Power Statistics – date of publication: 30 August 2022).

In Italy, the Fluid Power market in 2021 was estimated to be around € 2.5 billion, of which € 1.6 billion (64%) stemming from the hydraulic sector, and € 0,9 billion (36%) from the pneumatic sector. (Source: Assofluid – Il Fluid Power in Italia, Rapporto di settore 2021).

Below is given a geographic breakdown of the *home* hydraulic market, estimated by ISC, and the weighted growth forecast for the hydraulic end-use markets, published by Oxford Economics.

Hydraulic market – geographic breakdown



■ Europe (CETOP Area) ■ Asia (China, Japan, Taiwan) ■ USA

Source: CETOP³– ISC Statistics 2021

Note (1) The *Home Market* concept is used, as explained by CETOP on the report *European Fluid Power Directory 2017/2018*, for the market estimates in order to cover all of the fluid power market, and not exclusively that segment covered by companies which are part of the organization. For statistic's sake, the country where the product was built is irrelevant, while the country where the product was sold is considered.

Note (2): ISC - International Statistics Committee project has the objective of providing comparable information on Fluid Power markets in Europe, USA and Asia.

Note (3) CETOP - *European Fluid Power Committee* – is an organization of associations present in 17 European countries and representing more than 1.000 companies operating Fluid Power, representing 80 to 90% of the country's industry, most of the times.

Hydraulic end - use markets' forecasts

Weighted growth forecasts for key fluid power end use markets						
(Annual percentage changes unless specified)						
	2020	2021	2022	2023	2024	2025
Hydraulic end-use markets						
North America	-7.8	14.7	5.3	2.8	2.6	2.2
South America	-9.7	28.7	4.9	4.6	4.1	3.3
Europe	-13.8	13.5	6.1	2.3	1.2	1.1
Asia	-3.2	11.4	6.3	3.4	2.7	2.2
Middle East and Africa	-12.8	12.8	5.1	2.9	2.5	3.4
World	-5.8	14.8	5.4	2.9	2.4	2.0

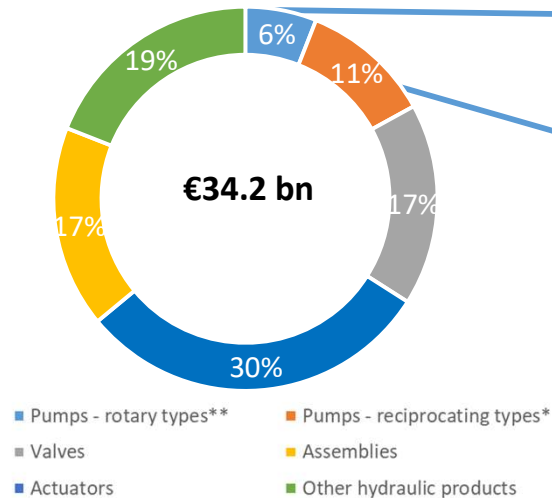
Notes: World and regional aggregates consist of the 21 countries included within the analysis

Source: Oxford Economics – National Fluid Power Association, Forecast of End-Use Markets- Winter 2021

Focus on hydraulic pumps' market

Within the Hydraulic *home*¹ market, the pumps' segment is estimated by ISC to be around 5.7 billion (17%) in 2021 (Vs € 4.9 billion in 2020), of which € 3.7 billion (11%) coming from the reciprocating pumps' segment (axial and radial piston pumps) and € 2 billion (6%) from the rotary pumps' segment (gear, vane, orbital, screw and other types of pumps). Focusing on the rotary pumps sector, in which MP operates, USA stands out as the main marketplace with around € 0.905 billion (44.5%) activity, followed by Asia, with € 0.737 billion (36.2%), and Europe with € 0.393 billion (19.3%).

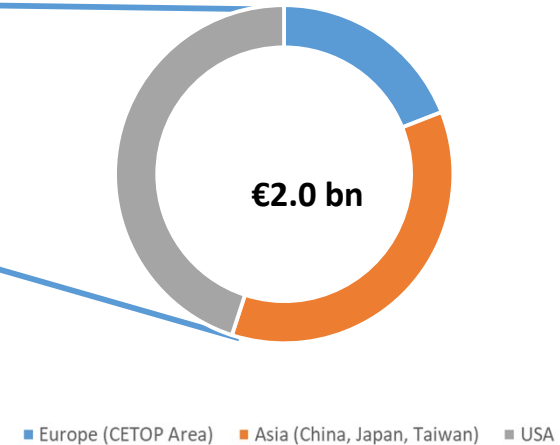
Hydraulic market - breakdown per product



* Reciprocating types: axial and radial piston; ** Rotary types: gear, vane, orbital, screw and other types

Source: CETOP³ – ISC Statistics 2021 – International Fluid Power Statistics

Rotary pumps' global market



Source: CETOP³ – ISC Statistics 2021 – International Fluid Power Statistics

Note (1) The *Home Market* concept is used, as explained by CETOP on the report *European Fluid Power Directory 2017/2018*, for the market estimates in order to cover all of the fluid power market, and not exclusively that segment covered by companies which are part of the organization. For statistic's sake, the country where the product was built is irrelevant, while the country where the product was sold is considered.

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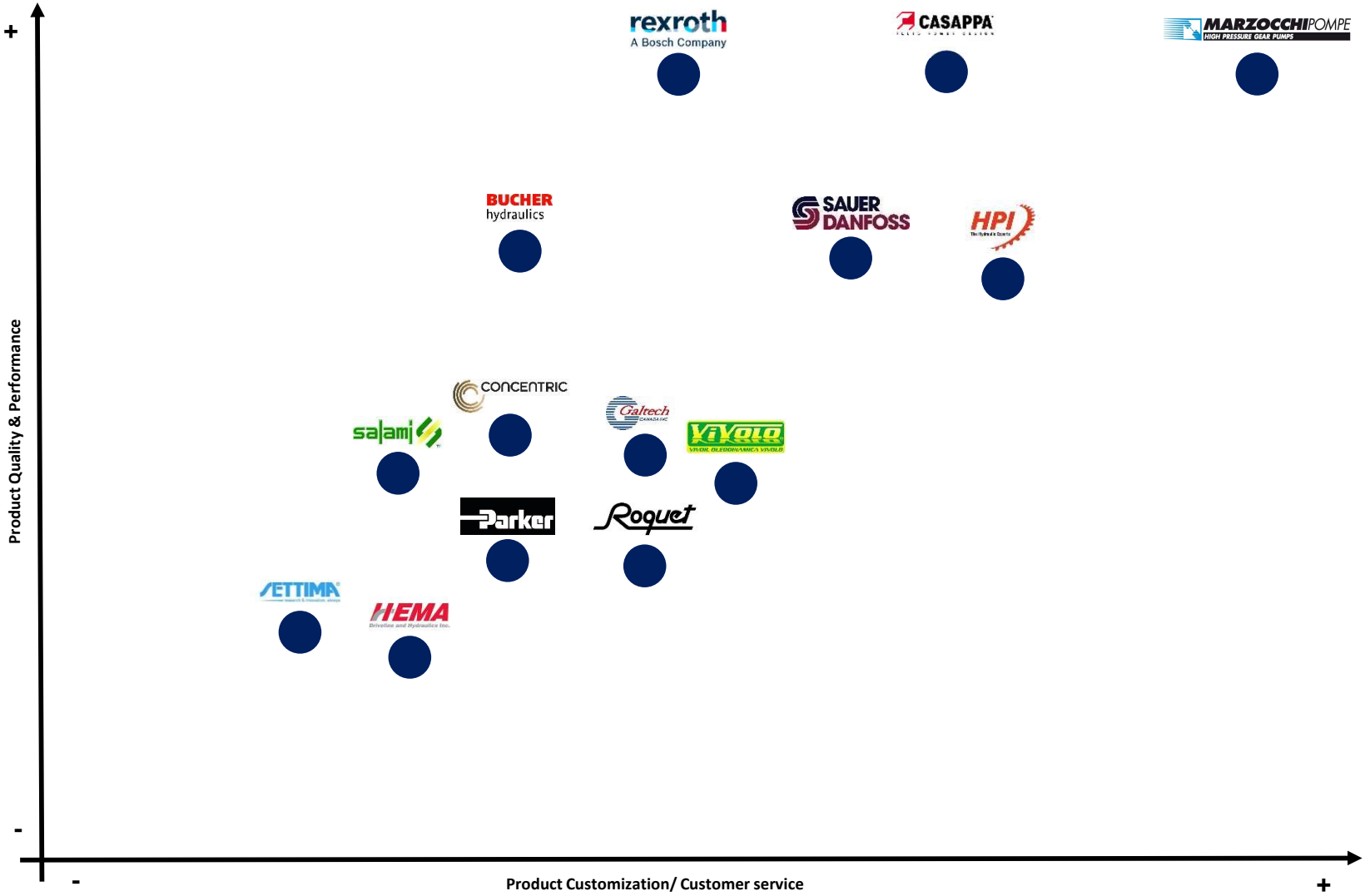
Competitive positioning

Characteristic Company	Quality & Performance	Customer service	Gear Pumps Range	Fluid Power Range	Customization	Competitiveness vs Price	Quality vs Price
Marzocchi Pompe	High	High	High	Medium - high	High	Medium	High
Bosch Rexroth	High	Medium - high	High	High	Medium - high	Medium	High
Bucher	Medium - high	Medium	Medium - high	Medium - high	Medium	Medium - high	Medium
Casappa	Medium - high	Medium - high	High	Medium - high	Medium - high	Medium - high	Medium - high
Concentric	Medium	Medium	Medium - high	Medium - high	Medium	Medium	Medium
Galtech/Interpump	Medium	Medium	Medium - high	Medium - high	Medium	Medium - high	Medium - high
Hema / DB	Medium - high	Medium - high	Medium	Medium	Medium	High	Medium - high
HPI / JTech	Medium - high	Medium - high	Medium - high	Medium - high	Medium	Medium	Medium
Parker	Medium	Medium	Medium - high	High	Medium - high	Medium - high	Medium
Roquet	Medium	Medium	Medium	Medium - high	Medium	Medium - high	Medium - high
Salami	Medium	Medium - high	Medium	Medium	Medium	Medium - high	Medium
Turolla/Sauer Danfoss	Medium - high	Medium - high	Medium - high	Medium - high	Medium	Medium - high	Medium - high
Settima	Medium - high	Medium - high	Medium - high	Medium - high	Medium - high	Medium - high	Medium
Vivoil	Medium	Medium	Medium - high	Medium - high	Medium	Medium	High

Source: Marzocchi Pompe SpA management estimates

Legend: High Medium - high Medium Low

Leadership in external gear pumps market



Source: Marzocchi Pompe SpA management estimates



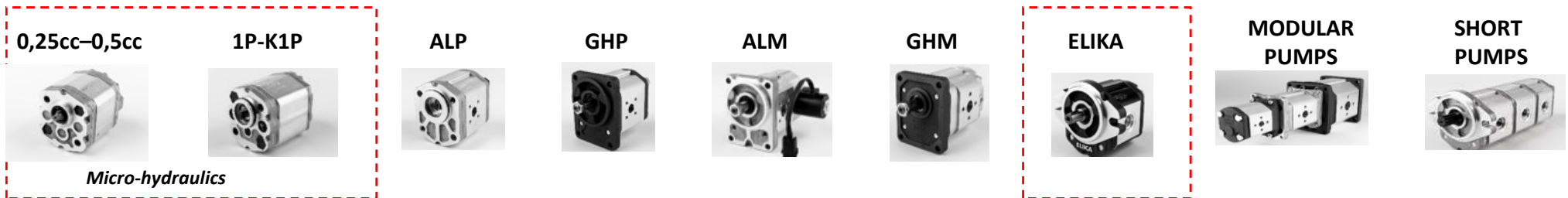
Appendix

- **Business Overview**
-

MP core business: manufacturing of external gear pumps and motors

- The pumps have the function of transferring the fluid from a tank to an actuator within an oil-hydraulic circuit. (for example, a cylinder that drives the shovel of an excavator). This transfer from the suction circuit to the delivery circuit occurs through the rotation of the two toothed wheels (the so-called "gears") inserted in the pump body, which is realized through the coupling with an endothermic motor or an electric motor. The oil that is transferred is located between the teeth compartments of the gear wheels and the pump body. The pressure that is created in the flow circuit downstream of the pump is proportional to the load determined by use.
- MP produces external gear pumps with straight teeth with an involute profile and helical rotor pumps with a conjugate profile. Both are part of the group of pumps called "volumetric", to which vane pumps, internal gear pumps and screw pumps also belong. The piston pumps also belong to the same category, which differ from the previous ones for the alternative movement instead of the rotary one.
- The gear motor is the actuator that transforms the hydraulic energy supplied by the pump into mechanical energy, creating a rotary motion with a defined number of revolutions and supplying a certain torque to the shaft on which mechanical systems such as fans and pulleys are connected.

Range of external gear pumps and motors by MP



Automotive customization

Regarding the micro-hydraulics (displacements starting from 0.12 cc per revolution) the Company has created customizations specifically for the automotive sector based on the needs and requirements of its customers



Focus on Elika product

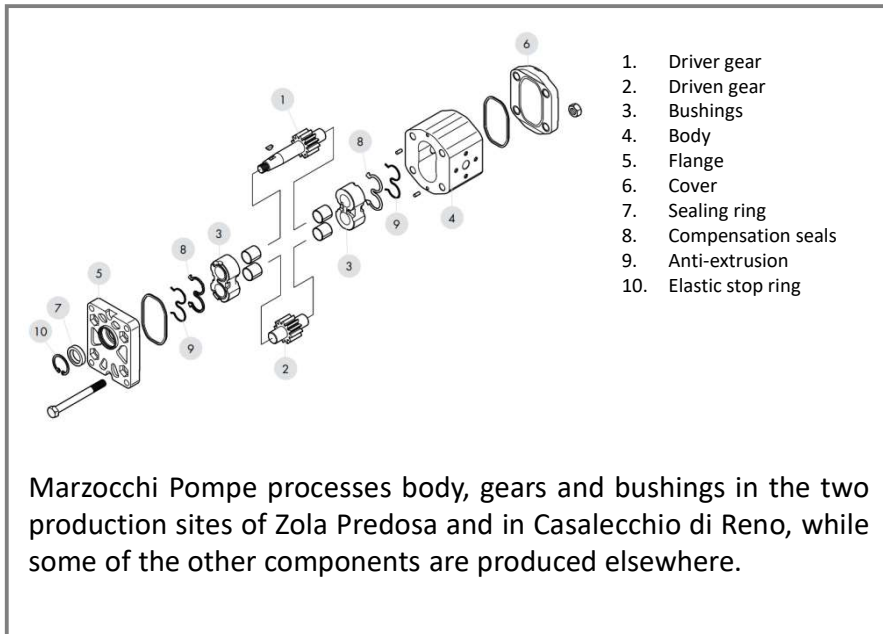
Elika is a helical toothed gear pump with a hydraulic system for balancing axial forces. It is a low noise and high efficiency product developed and patented by MP



Overview of pump composition and application examples

The pumps are composed of the following main parts: body, flange, cover and bushings in aluminium, and gears (driving and driven wheel) in steel. For some types of products, the flange and the cover can be made out of cast iron. Further components can also be integrated (for example valves), which vary depending on the type of product and customization requirements by the customer.

Basic pump components



Examples of application of MP products

Industrial

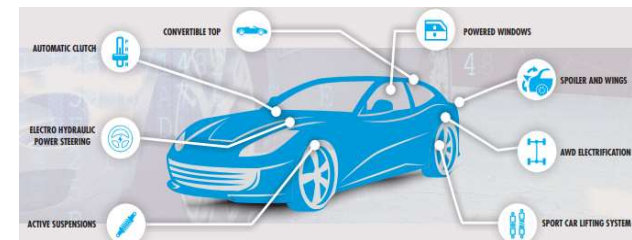


Mobile



In the mobile segment, the ELIKA product received the «Technical Reporting» award during the last Eima, one of the most important agricultural machinery fairs worldwide.

Automotive



Product applications



Medical equipment

Actuators for surgical tables, diagnostic equipment, latest-generation stretchers, dental chairs: in general, for small medical equipment, where reliability and silence are necessary.



Industrial

Fixed applications (eg presses, machine tools, etc.) that require hydraulic power units with high performance levels. This sector was among the first that the company positioned itself in.



Agricultural machinery

Even in agricultural machinery there is an important evolution in terms of hydraulic systems. Increasingly high performance and low noise levels are required.

MICRO-HYDRAULICS



Micro-hydraulics

MP is specialized in the production of very low displacement pumps, which require a high technological level to obtain high efficiency standards.



Machinery and equipment for *material handling*

Even for these type of machines, very often used inside production facilities, low noise levels are increasingly required in addition to high efficiency standard.



Marine

There are many pump applications in the nautical sector: movable bulkheads, thrusters, opening and closing valves, flap drives, boarding and disembarking ladders, piloting systems.



Gardening machines

In this type of application it is essential that oil-hydraulic pumps and motors guarantee the complete absence of contamination.



Construction machinery

Extreme flexibility in terms of interface versions (shafts, ports, flanges, etc.) and very high reliability are the features required by this market.



Means of transport

Brake systems for trams and city trains as well as for airport vehicles. In a world that makes mobility an irreplaceable necessity, products that guarantee the highest level of reliability and safety are in high demand.



Municipality

Municipality issues require a very wide range of products, all with maximum reliability.



Automotive

Even in electric cars, small displacements gear pumps are increasingly used in many applications such as: powertrain, power steering, attitude regulators (with PPM of defectiveness tending to zero).



New energy sources

In these applications, such as wind and solar, the compatibility with the environment is of fundamental importance.

Technological innovation and quality standards

The Group's business model is focused on the design, production and marketing of high-performance external gear pumps and motors. The Company manufactures almost all the main components within its own production sites and uses the historical brand “Marzocchi Pompe”, which is highly recognizable in the sector.

Automated and highly innovative production process

- Technologically advanced production process with a high degree of automation
- Strategic phases of the production process entirely managed in house
- Internal department dedicated to the design and production of equipment and machinery for the internal production needs
- Application of the concepts of lean production, with the aim of maximizing efficiency while minimizing stocks

Continuous product and process innovation

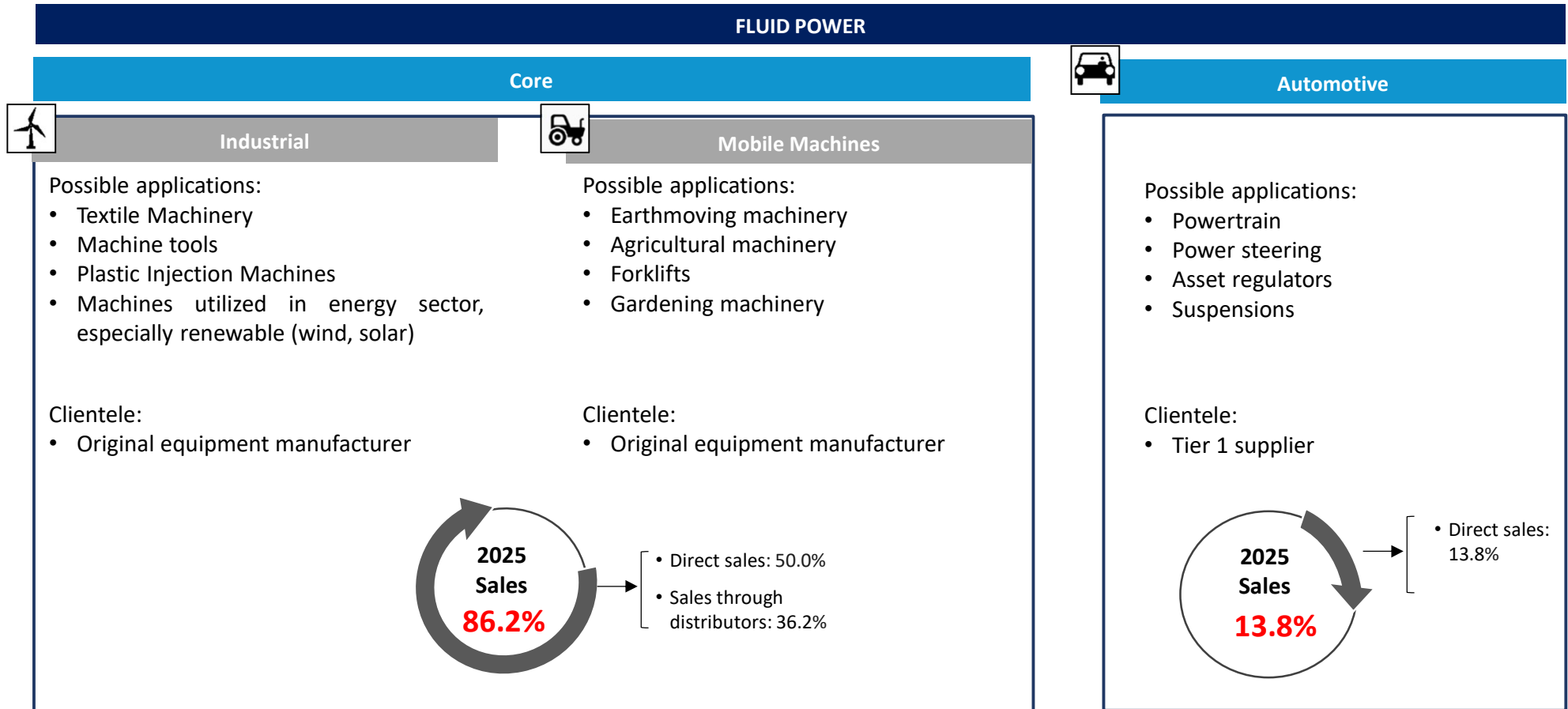
- Continuous product development to meet the increasing market requirements, in terms of silence and efficiency . In particular, the R&D activity has allowed Marzocchi Pompe to stand out for:
 - its wide range of products’ cubic capacities (from 0.12 cc to 200 cc)
 - the high performances of its products, with particular reference to the micro hydraulics field (displacements starting from 0.12 cc)
 - the patented ELIKA product, low noise pump, high efficiency even at low speed and flow rate regularity due to low pulsations

Focus on quality and excellence

- *Made in Italy* product
- High quality standards
- IATF 16949 (formerly ISO TS) certifications (required for the supply of Automotive customers) and ISO 14001 for the plant in Zola Predosa (BO), and ISO 9001 for the plant in Casalecchio di Reno
- 100% qualified product ensured by a test carried out on specifically designed test benches

Target markets

Core market revenues include Industrial and Mobile machines applications and represent 86.2% of total 2025 revenues, including sales to distributors/sales network, which alone contribute to 36.2% of MP's total sales^(*)



^(*) The industrial and mobile machines sectors are served by MP both directly, through direct sales, and indirectly, through a distributors' channel/external sales network; the share of sales registered from the sales network can't be attributed to either sector, industrial or mobile machines

Main client composition

- The company benefits from a diversified client base for the Industrial and Mobile machine sectors, having their top 3 clients making up only 9.7% of sales and the top 10 representing 24.0%. The Automotive sector, on the other hand, has fewer clients making up for most of its sales. In total, the company has more than 800 active clients
- The following table reports the weight on consolidated revenues of the top 3 and 10 clients for both sectors (Industrial & Mobile and Automotive, accounting for 86.2% and 13.8% of total sales, respectively) according to the financial year's consolidated data of Dec. 31st 2025

Overview weight % top clients¹

	Industrial & Mobile ²		Automotive	
	Revenues 2025	%	Revenues 2025	%
Top 3	3.11 mln	9.7%	4.37 mln	85.5%
Top 10	7.70 mln	24.0%	5.05 mln	98.8%
Total	32.03 mln	100.0%	5.11 mln	100.0%

Note (1): Consolidated data.

Note (2): Revenues from distributors included.

85.5% of automotive's revenues are made from sales to only one client, with whom MP subscribed, on October 2014, a multi-year contract expired on December 31st 2022 but **this contract has been renewed until 2034** and guarantees the supply of micro-pumps by MP, with the following clauses:

- Pre-established price, mainly based on volumes ordered
- Price-adjustment according to previously established mechanisms, based on current raw materials' prices

Global distribution network

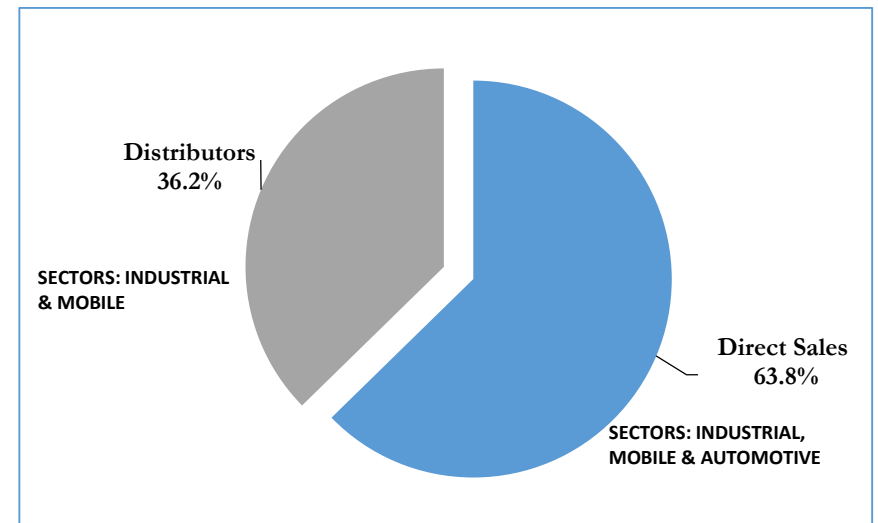
Marzocchi Pompe relies on an international distribution network present in **over 50 countries**. Products are distributed through various channels, such as direct sales, distributors, sales¹, American branch operations and Chinese branch operations

Distribution network's highlights

Direct sales and sales through distributors, covering the global market, are managed by a dedicated internal salesperson, namely the Area Manager. There are currently **5 Area Managers** operating:

- 1 Area Manager for the **North American market**
 - 1 Area Manager for the **Spanish, Portuguese, French, African, Oceanian, South American and Middle East Markets**
 - 1 Area Manager for the **Chinese, Far East and Rest of Europe Markets**
 - 1 Area Manager for the **Automotive Customers, in any Country**
 - 1 Area Manager responsible for **the Italian market**, coordinating a network of 5 salesmen
- Direct influence on **U.S. and Far East** markets through the branches **Marzocchi USA** and **Marzocchi Symbridge**
 - Renowned and large international network of **distributors and resellers**, selected based on their medium-high positioning, outstanding product quality, and high visibility of sold brands

2025 sales breakdown per selling channels*



*Consolidated data FY2024

Nota (1): the term "distributors" describes those subjects that purchase MP's products and then re-sell them, establishing a prolonged business relationship with the company

Investment highlights

Large target market experiencing growth

- The Hydraulic market is large, estimated to be around 10.3 billion in 2021 in Europe (Source: CETOP) and € 1.6 billion in 2021 in Italy (Source: Assofluid)
- Evidence of upward trend of Italian hydraulic market in the 2009-2018 period, with a 15.2% decrease in production from 2019 to 2020 due to the Covid-19 pandemic

Wide range of product applications

- Countless possibilities in terms of MP pump and motor applications, thanks to the Company's versatility and product personalization options

Business model geared towards innovation

- Production process relies on high-tech machinery and extensive use of automation
- Internalization of strategic production process, guaranteeing constant monitoring and high-quality standards
- Continuous product innovation, as it can be seen with ELIKA, one of MP's pumps covered by two patents, which stands out for its outstanding technological level that allows it to produce low noise emissions and low pulsations, but has high efficiency

High profitability and cash flow generation

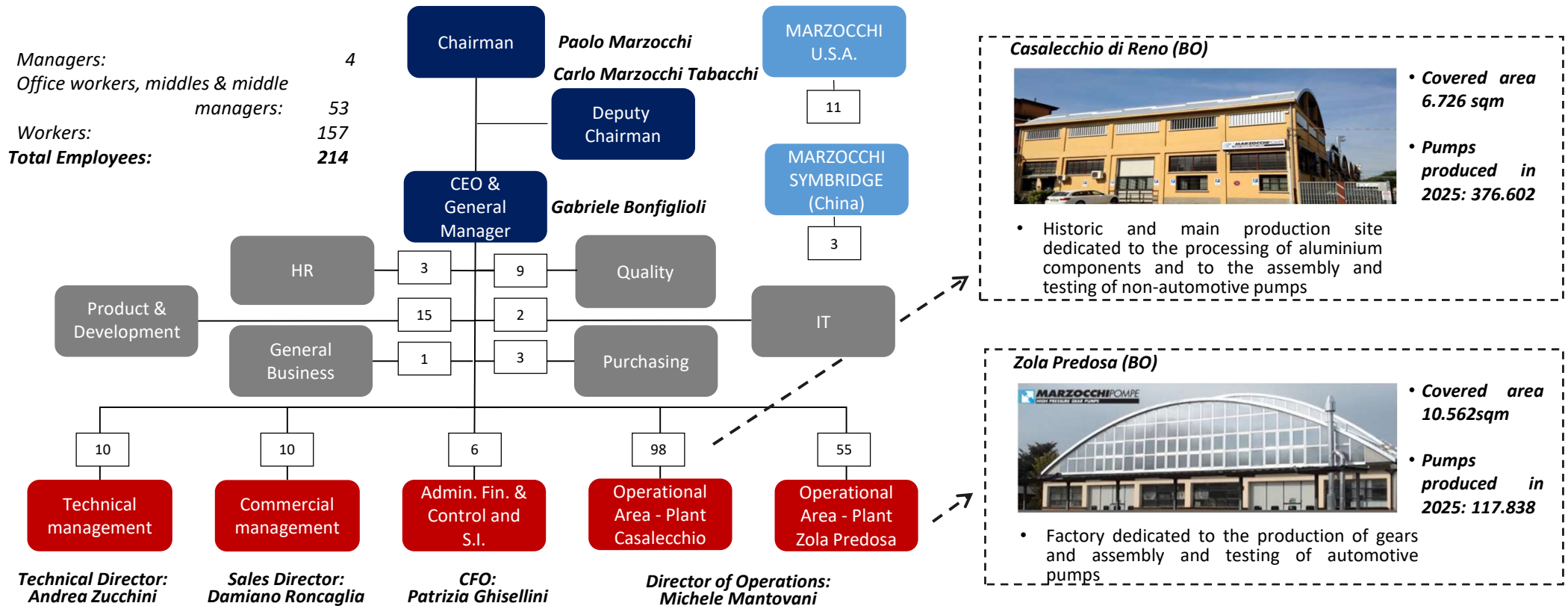
- EBITDA margin at 9.45% in 2025, stable on 2024
- High free cash flow (5.0M€ in 2025) allowing for a comfortable NFP Adjusted/EBITDA Adjusted of 2.2x

Esteemed execution capabilities

- Renowned production ability for customized products
- High standards on quality, reliability and product performance
- Highly responsive customer service, and competent assistance in pre- and post-order phases

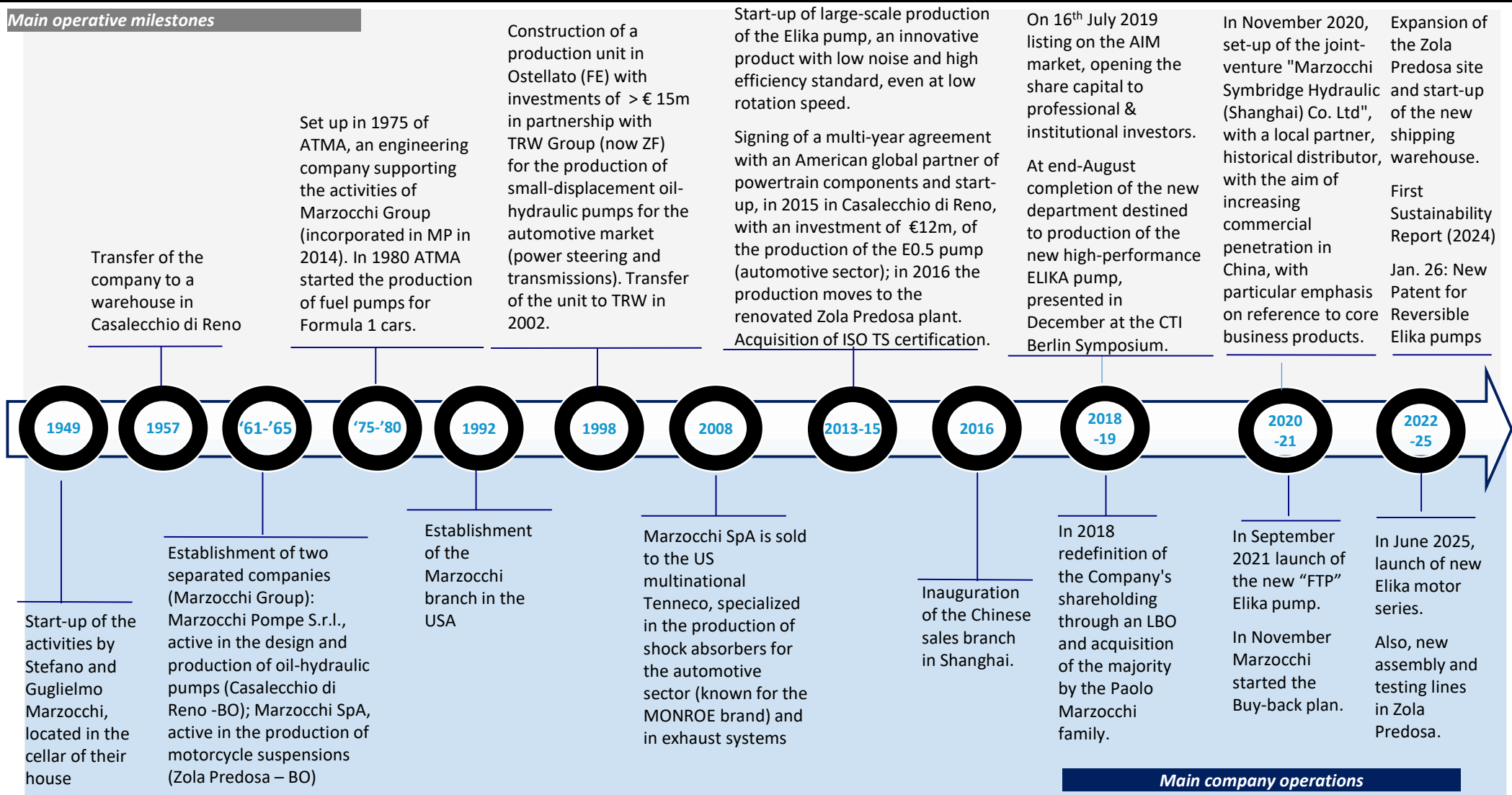
Organizational structure and production sites

- Marzocchi Pompe can count on a team of professionals with consolidated experience. **As of end-December 2025** the workforce consists of **214 resources**, with an heterogeneous background of professional skills that strengthens the efficiency of the work team. The resources operate in two production sites, directly owned by the company, located in Casalecchio di Reno (BO) and Zola Predosa (BO).
- To this date, MP can be defined as a true "pocket multinational", meeting the best standards of Made in Italy and excellence.



History

Main operative milestones



Main company operations



Appendix

- Financials

Consolidated Profit & Loss

<i>Euro 000</i>	31-Dec-25		31-Dec-24	
Revenue from sales	37,138	100%	40,038	100%
Changes in WIP	(493)		(1,559)	
Revenue from production and sales	36,645		38,479	
Other revenue	816		1,011	
VALUE OF PRODUCTION	37,460		39,490	
Consumption of raw materials	(8,038)	(21.9%)	(8,854)	(23.0%)
Service costs	(10,509)	(28.7%)	(10,727)	(27.9%)
Rentals and leases	(537)	(1.5%)	(437)	(1.1%)
Sundry operating expense	(489)	(1.3%)	(477)	(1.2%)
ADDED VALUE	17,887	48.81%	18,994	49.36%
Adjusted personnel expense	(14,424)	(39.4%)	(15,359)	(39.9%)
Adjusted EBITDA	3,463	9.45%	3,635	9.45%
Amortization, depreciation and write-downs	(2,455)	(6.7%)	(2,667)	(6.9%)
Adjusted EBIT	1,008	2.75%	968	2.51%
<i>non-recurring income and expense</i>	<i>(957)</i>	<i>(2.6%)</i>	<i>0</i>	<i>0.00%</i>
financial income and expense	(724)	(2.0%)	(605)	(1.6%)
adjustments to financial assets	(46)	(0.1%)	45	0.12%
PROFIT (LOSS) BEFORE TAX	(719)	(2.0%)	407	1.06%
Income tax for the year	173	0.47%	(78)	(0.2%)
NET RESULT	(546)	(1.5%)	329	0.86%

* In 2025 EBITDA and EBIT Adjusted for € 0.96 million personnel expense for non-recurring costs for redundancies

(National accounting standards + IAS 17)

Consolidated Balance Sheet

<i>Euro 000</i>	31-Dec-25	31-Dec-24
A) NET FIXED ASSETS	17,819	17,407
Intangible fixed assets	574	592
Tangible fixed assets	16,491	15,982
Financial fixed assets	755	833
B) NET WORKING CAPITAL	14,420	16,984
Inventory	9,796	9,963
Customer advances	(47)	(171)
Trade receivables	8,752	7,772
Other receivables	5,239	7,775
Trade payables	(5,011)	(4,205)
Other payables	(2,772)	(2,956)
Provisions for risks and charges	(1,092)	(1,168)
Other assets/liabilities	(445)	(27)
C) GROSS CAPITAL EMPLOYED	32,239	34,391
D) POST-EMPLOYMENT BENEFITS	(968)	(1,189)
E) NET CAPITAL EMPLOYED	31,272	33,201
covered by		
F) EQUITY CAPITAL	(20,927)	(21,880)
G) NET FINANCIAL POSITION	(10,345)	(11,321)
Medium-long term financial payables	(12,725)	(10,969)
Short-term financial payables	(6,207)	(5,038)
Cash	8,586	4,685
H) TOTAL SOURCES OF FUNDING	(31,272)	(33,202)

(National accounting standards + IAS 17)

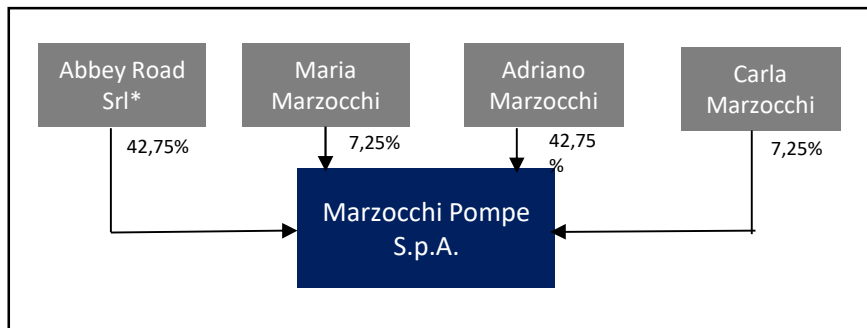
Consolidated Cash Flow Statement

€/000	2025	2024
EBIT	51	968
Tax effect	173	(78)
Change in provisions	(298)	57
Provisions and write-downs	2,455	2,667
Cash flow from earnings	2,381	3,614
Changes in working capital		
Inventory	168	2,831
Trade receivables	(1,104)	(291)
Other receivables	2,536	(2,443)
Payables to suppliers	806	(1,586)
Other payables	235	75
Changes in working capital	2,640	(1,413)
Free cash flow	5,022	2,201
Net investment in tangible and intangible fixed assets	(2,946)	(3,233)
Change in other fixed assets	78	(5)
Adjustments to financial assets	(46)	45
Cash flow from investing activities	(2,914)	(3,193)
Financial expense/income	(724)	(605)
Increase/(decrease) in share capital	0	0
Other changes in equity	(408)	(1,381)
Cash flow from financing activities	(1,132)	(1,986)
Net cash flow	976	(2,978)
Net financial position beginning of period	(11,321)	(8,343)
Net financial position end of period	(10,345)	(11,321)
Net increase (decrease) in cash	976	(2,978)

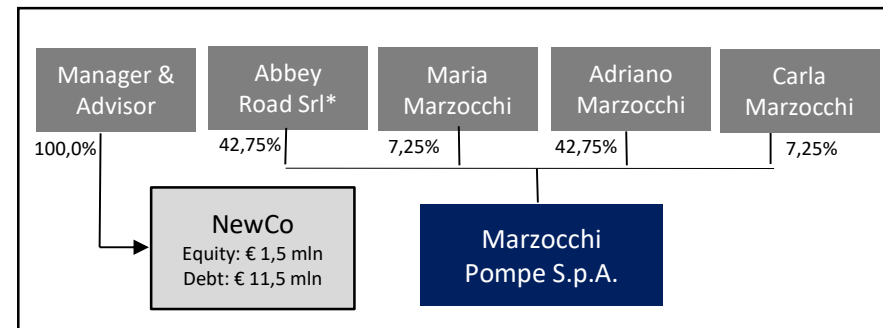
Focus on family and management Buy-out

During 2018 the company underwent a restructuring procedure that modified the shareholding structure. As of today, the company is owned by Paolo Marzocchi. The operation was completed through the creation of a financial debt with Banca di Bologna, which allowed the release of some shareholders and ease the access of a new group of shareholders formed by the company's managers and a third partner, Crosar Capital, advisor of the operation and of the subsequent IPO.

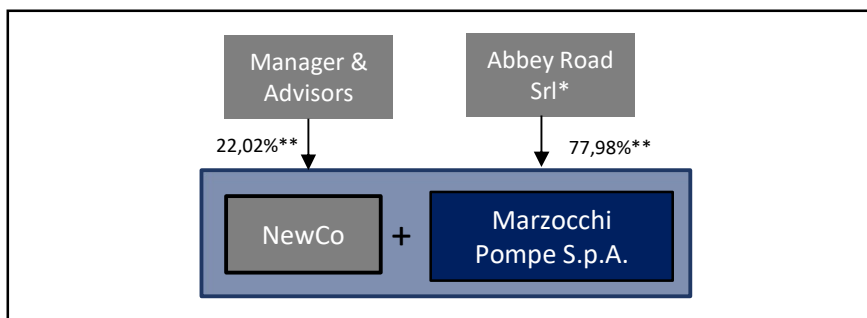
1 Shareholding Marzocchi Pompe pre-LBO



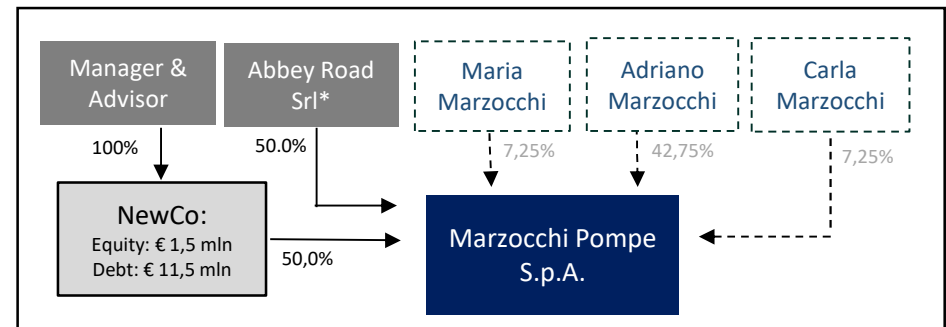
2 Management and advisor create a NewCo for the acquisition of Adriano and Carla Marzocchi's shares (42,75%+7,25%) with € 13 mil (Equity + Debt)



4 NewCo reverse merge into Marzocchi Pompe



3 NewCo acquires 50% of MP from Adriano and Carla Marzocchi for € 12,5 mil; Paolo Marzocchi acquires 7,5% of MP from Maria Marzocchi



*Abbey Road Srl is owned by Paolo Marzocchi (99,5%) and his nephew Marco Camorani Scarpa (0,5%)

** 89% of Marzocchi Pompe SpA shares is pledged to Banca of Bologna

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CONTACTS

Marzocchi Pompe S.p.A.

ir@marzocchipompe.com

Integrae SIM S.p.A. – Euronext Growth Advisor

Francesco D'Antonio francesco.dantonio@integraesim.it

Dario Gancitano dario.gancitano@integraesim.it

Beatrice Bussoli beatrice.bussoli@integraesim.it

CDR Communication - Investor & Media Relations

Paola Buratti, Investor Relations paola.buratti@cdr-communication.it

Martina Zuccherini, Media Relations martina.zuccherini@cdr-communication.it