



FIRST HALF 2025 RESULTS PRESENTATION

30 September 2025

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Agenda

- ❑ Company at a Glance
- ❑ 1H 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

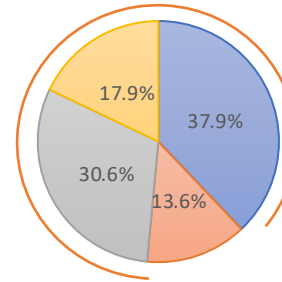
€/000	2022	2023	2024	1H 2025
Net Sales	48.513	49.746	40.038	18.570
EBITDA Adjusted *	7.557	8.101	3.635	2.071
EBITDA Adj. Margin *	15,4%	16,4%	9,45%	10,51%
Net Income	1.962	3.006	0.329	(0.779)
Net Equity	21.400	22.932	21.880	20.758
Net Financial Debt **	7.848	5.335	5.769	7.685

2025 KPI

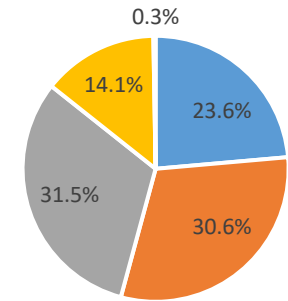
- About 0,7 mln pumps produced in 2024
- More than 800 active clients
- Employees at June 2025: 246

* 1H2025 EBITDA Adj. net of Not Recurring Costs, Margin on Sales Revenue+WIP
** 1H 2025 NFP Adjusted: Net of € 3.7 €m of 3M, 6M term bank savings deposits

1H 2025 Revenues by Business Line



1H 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, consolidating its leadership in the reference market → new Elika modular 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

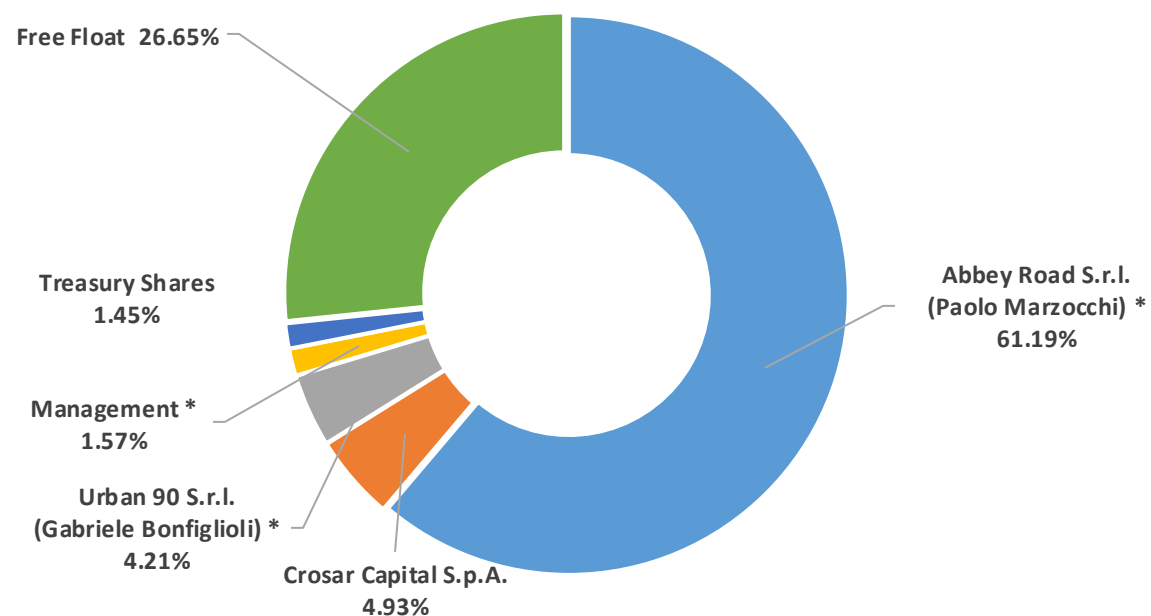
Franco ROSSI
Board Member

Valentina CAMORANI SCARPA
Board Member

Matteo TAMBURINI
Board Member

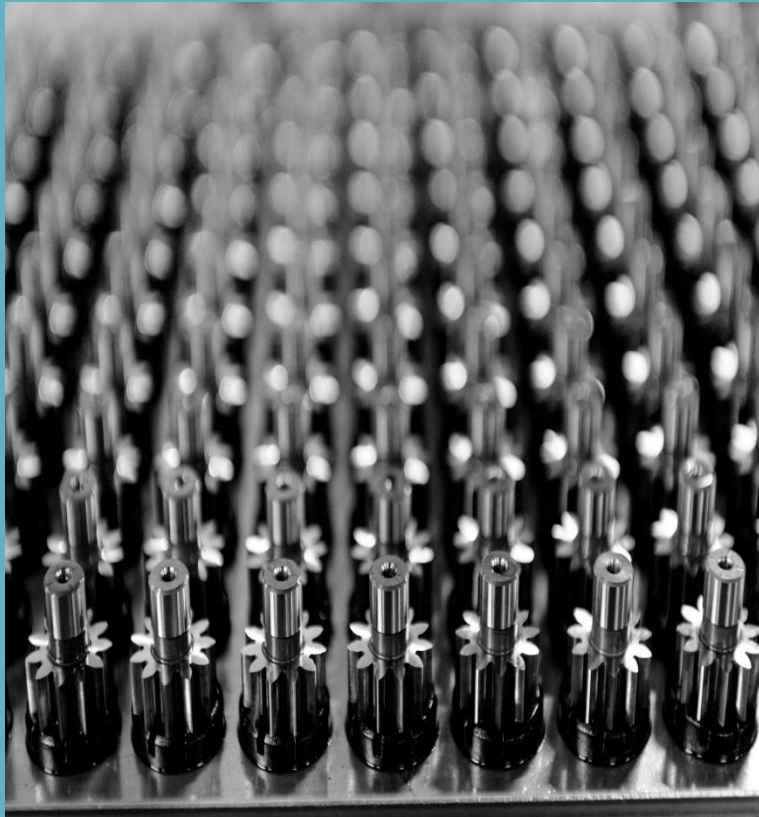
Giuseppe ZOTTOLI
Independent Board Member

SHAREHOLDERS



*) Parasocial agreement renewed until 30 June 2026

Note: Data as of 26 September 2025



1H 2025 Results

1H 2025: Marzocchi is able to compete in very challenging markets

MARKET SCENARIO

- **SLUGGISH GLOBAL ECONOMY**
- **Customers' need for Competitive & Customized products**

Actions



MARZOCCHI POMPE ANSWER

- New product launches i.e. ELIKA Modular Pumps and Motors
- Focus on Co-Design with customers
- Scouting New Markets by participating to International Trade Fairs

MARZOCCHI RELENTLESS INVESTMENTS FOR FUTURE GROWTH AND VALUE CREATION

- **Need to Re-organize 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 becoming the sole logistics & production site of Marzocchi

1H 2025 Results: Flexibility and Investments are crucial to compete

➤ NET SALES AT € 18.6 M, -15.7% on 1H 2024, IN LINE WITH INDUSTRY TREND

- THE CORE BUSINESS SALES WERE € 16.0 M IN 1H 2025, DOWN 13.2% Y-O-Y, HOWEVER SHOWING A 3.2% INCREASE ON 2H 2024
- THE AUTOMOTIVE SALES AT € 2.5 M, -28.4%, WERE HIT BY THE FALL IN THE U.S. MARKET, WHICH COMBINED WITH END LIFECYCLE OF KEY PRODUCTS

➤ EBITDA ADJ. MARGIN AT 10.5% (vs 14.6% in 1H 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
- PROFITABILITY WAS HOWEVER HIT BY THE EXTRA PROVISIONS FOR LAYOFFS (22 WORKERS ON A VOLUNTARY BASIS) AMOUNTING TO € 0.86 M
- THE REORGANIZATION WILL DISPLAY ITS POSITIVE EFFECTS IN THE COMING MONTHS WITH AN ESTIMATED BENEFIT OF € 0.55 M PER SEMESTER

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

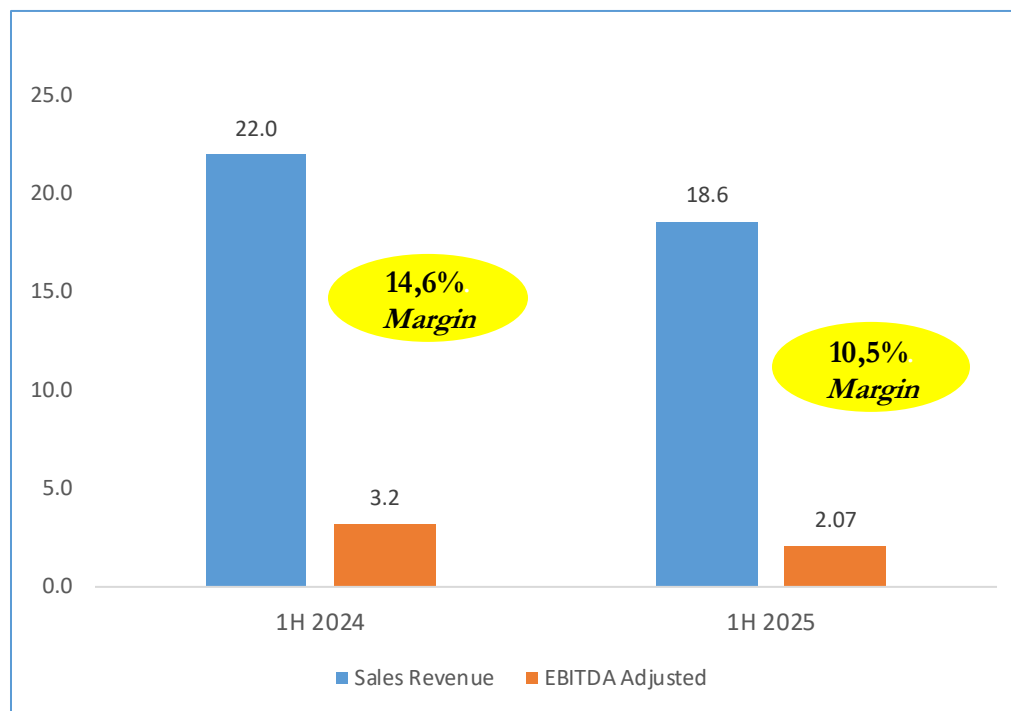
- DEBT INCREASE WAS DRIVEN BY INVESTMENTS REGARDING THE LAUNCH OF TWO NEW ASSEMBLY AND TESTING LINES FOR THE ELIKA 1P AND ELIKA 2 PUMP WITHIN THE RATIONALIZATION PROCESS AT THE ZOLA PREDOSA PLANT AIMED AT INCREASING EFFICIENCY IN PRODUCTION AND LOGISTICS

➤ MARZOCCHI POMPE KEEPS ON INVESTING TO FURTHER GAIN COMPETITIVENESS

- IN FIRST HALF 2025, MARZOCCHI MAINTAINED STRONG MOMENTUM IN BOTH LAUNCHING NEW PRODUCTS - SUCH AS THE ELIKA MODULAR MOTOR SERIES - AND EXECUTING ITS INVESTMENT PLAN TO ENHANCE PRODUCTION CAPACITY, WITH THE START-UP OF TWO NEW ASSEMBLY AND TESTING LINES AT THE ZOLA PREDOSA PLANT. THE LATTER WILL ALSO BOOST OPERATIONAL EFFICIENCY AND SUPPORT FUTURE EXPANSION
- IN SUCH A CHALLENGING MARKET BACKDROP, THESE INVESTMENTS PUT THE GROUP IN THE BEST SHAPE TO SEIZE MARKET RECOVERY

Revenues at € 18.6 m, EBITDA Adj. margin at 10.5%

Sales Revenue and EBITDA Adjusted * (€m)



* EBITDA Adjusted excluding Not Recurring Costs for Personnel Reduction, composed as follows:

- € 0.86 million for redundancy incentives

- € 0.55 million for salaries and contributions for the period which, although incurred in the first half of the year, will not be repeated starting from the second half of 2025

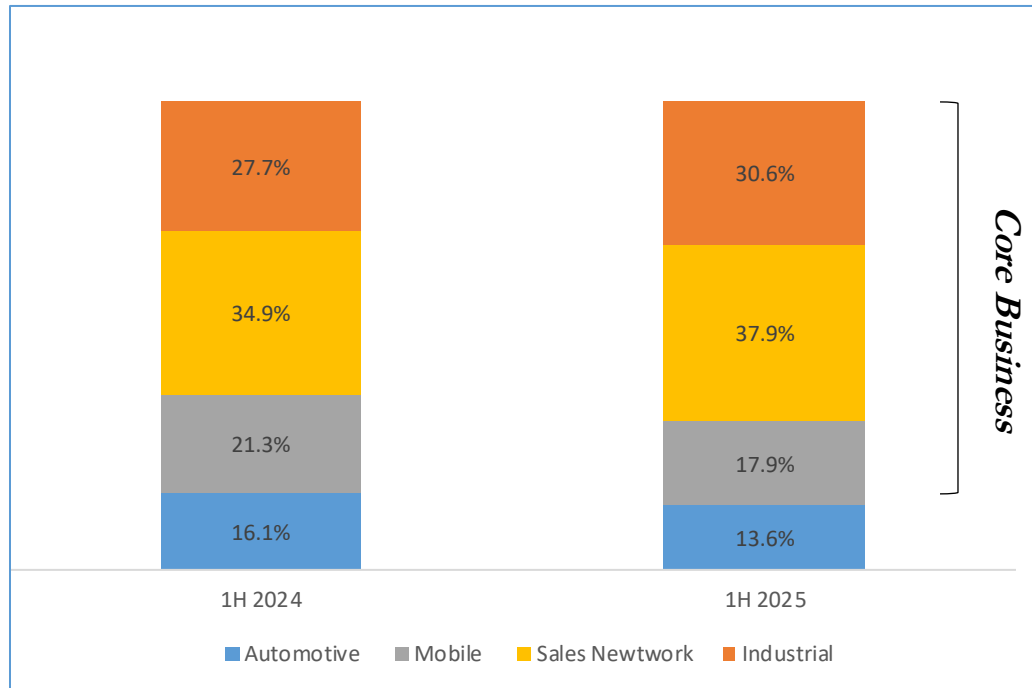
** EBITDA Margin calculated on Sales Revenue + WIP

Source: consolidated financial statements

- **Sales revenue** at € 18.6 million, -15.7% vs. 1H 2024, were in line with the industry slowdown
- **Core Business** sales were € 16.0 million (-13.2%), while increasing by +3.2% on 2H 2024
- **Automotive** sales fell 28.4% to € 2.5 million, following the sharp drop of demand in North America and the end lifecycle of key products
- **EBITDA Adjusted** stood at € 2.07 million (-36% on 1H 2024), restated for € 1.41 million not recurring costs for personnel rationalization
- **EBITDA Adjusted margin** of 10.5% proves Marzocchi capability to defend margins in difficult times thanks to its flexibility and relentless search for efficiency. Future profitability will benefit from process optimization at the enlarged productive and logistics area in **Zola Predosa** that is centralizing all the Group's operations

Core Business at 86.4% of revenues, Italy at 31.5%

Revenue Breakdown

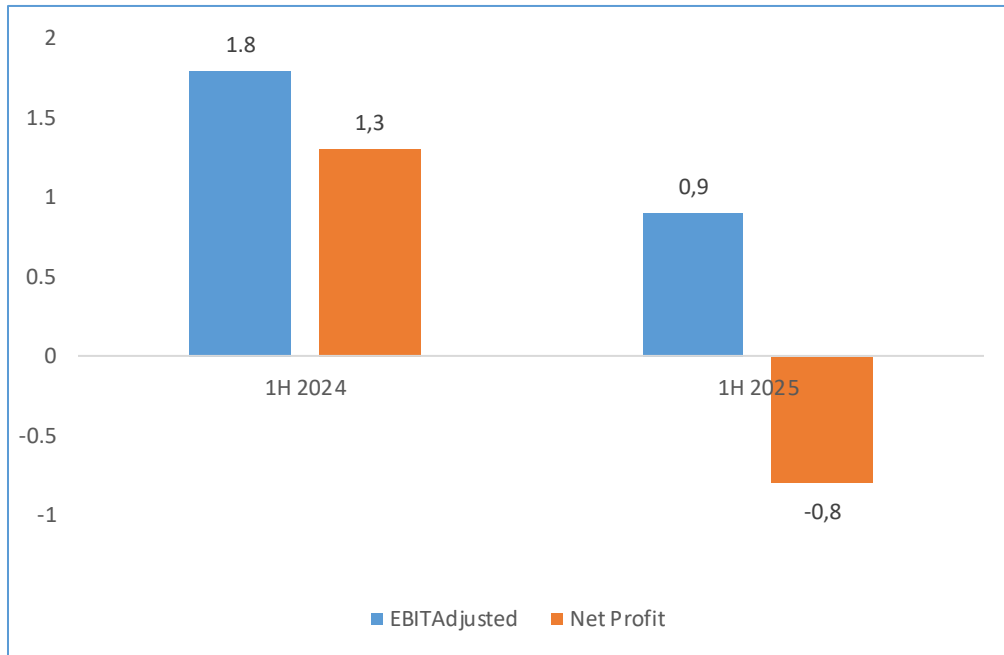


- Revenues by **Core market segments** (Sales Network, Industrial and Mobile) increased to 86.4% of Total Sales (vs. 83.9% in 1H 2024)
- Conversely, **weight of Automotive sales decreased to 13.6%** (from 16.1% in 1H 2024) mainly due to U.S. downturn and end lifecycle of key products. Marzocchi has recently acquired **new contracts** that will develop over a longer time horizon
- **Italy** increased its weight to 31.5% of Marzocchi total sales, from 29% in 1H 2024

Source: consolidated financial statements

Profitability hit by Extra Provisions for Layoffs (on a voluntary basis)

EBIT Adjusted and Net Result (€m)



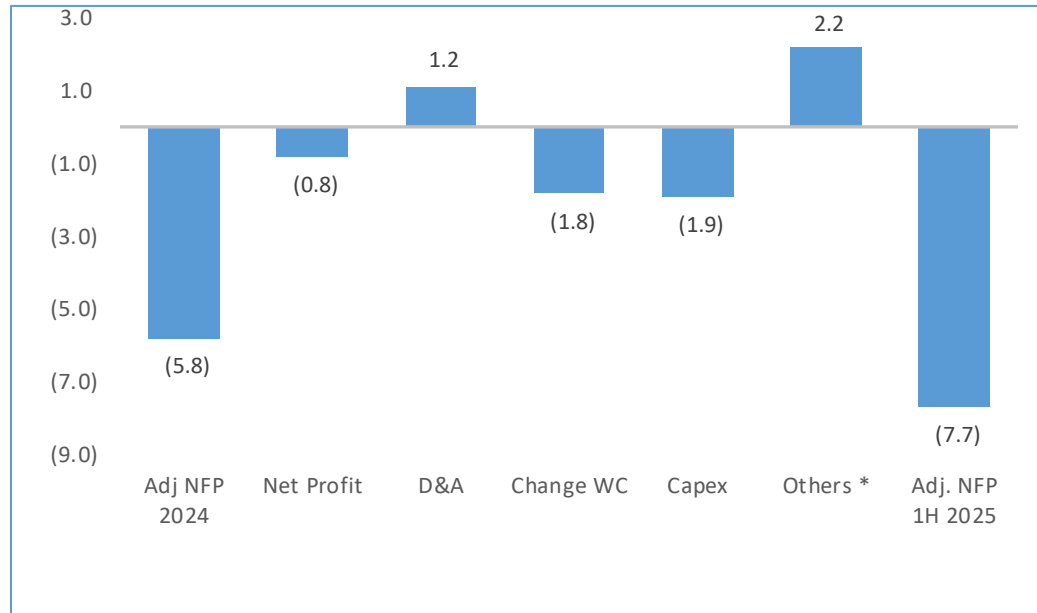
* EBIT Adjusted is Net of depreciation from revaluation resulting from the merger from LBO

- **EBIT Adjusted**, calculated net of revaluation depreciation and amortisation resulting from the merger from LBO in 2018, fell to € 0.9 million, half of that in June 2024, due to sales decrease and the higher personnel costs (which includes **not recurring costs** for redundancies of € 1.41 millions)
- **Net Result** turned negative for € 0.8 million, from € 1.3 million profit in the first semester of 2024. Overall, **Marzocchi 1H 2025 results proved its resilience in the global economic downturn that is hardly hitting the industrial sectors**

Source: consolidated financial statements

Rock Solid Net Financial Position allows to Invest for future Growth

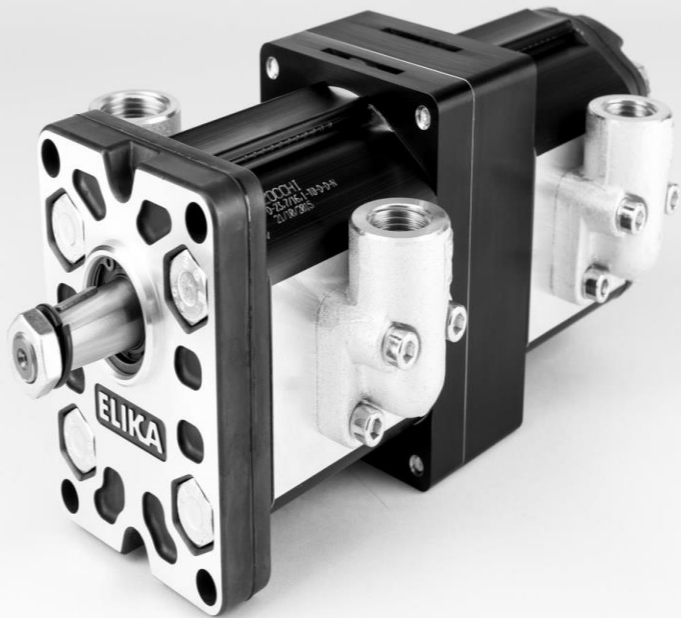
Adjusted Net Financial Position Evolution (€m)



* Others include € 3.7 million of three- and six-month term bank savings deposits split as follows:
 - € 3.0 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 June 30, 2025.

- **Adjusted Net Financial Position** amounted to **€ 7,7 million** at June 2025 vs. € 5.8 million at end-2024
- Adjusted NFP is **net of € 3.7 million** of three- and six-month term bank **savings deposits** (vs. € 5.7 million in FY 2024) reclassified under other receivables in current assets
- Marzocchi keeps on investing for future growth. **Capex confirmed at 10% on Sales**, at € 1.9 million in 1H 2025, only slightly down from € 2.1 million in 1H 2024
- **Shareholders' Equity** stood at **€ 20.8 million**, from € 21.9 million in 2024

Source: consolidated financial statements



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 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 CONSISTENLY 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 SUSTAINABILTY
- 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 – 2025: A good mix of Traditional and New

- ✓ **AGRITEK KAZAKHSTAN ASTANA** – 12.03.2025
Agricultural Exhibition- Main Hall, Booth 717



- BAUMA MUENCHEN** – 07.04.2025
Mobile Exhibition – Hall A4, Booth 414

- IVT OFF-HIGHWAY EXPO CHICAGO** – 20.08.2025
Mobile Exhibition – Main Hall, Booth 248



- POWER TRANSMISSION AND CONTROL ASIA SHANGHAI** – 28.10.2025
Industrial Exhibition – Made-in-Italy HALL

2024 – Efforts to explore New Markets, aside traditional industries



2024 Leitmotiv: by land, sea and sky and brand new experiences



- ✓ **AERO EXPO FRIEDRICHSHAFEN** – 17.04.2024
Aerospace Exhibition - Hall B3, Booth 110



- ✓ **SMM BOAT SHOW HAMBURG** – 03.09.2024
Marine Exhibition – Hall B3.OG, Booth 237



- ✓ **EIMA Bologna** – 06.11.2024
Agricultural Exhibition – Hall 18, Booth C9



- ✓ **BAUMA CHINA SHANGHAI** – 26.11.2024
Mobile Exhibition – ICE UNACEA, Made-in-Italy HALL



- ✓ **BAUMA CONEXPO NEW DELHI** – 11.12.2024
Mobile Exhibition – Hall 10, BooTH K41



2023 - Present to world leading exhibitions (taking place every 2 years)



✓ **Bauma ConExpo India** – 31.01.2023
Mobile Exhibition - Hall 10, Booth L102



✓ **IFPE ConExpo Las Vegas** – 13.03.2023
World Mobile Exhibition – South Hall, Booth 81745

✓ **Hannover Messe** – 17.04.2023
World Fluid Power Exhibition – Booth H5.F18



✓ **Dritev Baden Baden** – 05.07.2023
Automotive Symposium - Main Hall

✓ **Perumin Arequipa** – 25.09.2023
Mining Exhibition – Hall 5



PTC ASIA 2023

24-27 October 2023
Shanghai New International Expo Centre
(Since)-China

✓ **PTC - Power Transmission & Control 2023** – 24.10.2023
World Industrial Exhibition – Hall E3, Booth C2-1

✓ **Agritechnica Hannover** – 12.11.2023
World Agriculture Exhibition – Hall 17, Booth E43



✓ **CTI Berlin** – 05.12.2023
Automotive Symposium - Booth E7

1H 2025 Highlights & Outlook

- **THE FIRST HALF OF 2025 PROVED TO BE VERY CHALLENGING FOR THE MANUFACTURING SECTOR, WITH THE PERSISTENCE OF DIFFICULTIES RELATED TO GEOPOLITICAL EVENTS, RISING ENERGY COSTS AND A SLOWDOWN IN GLOBAL INVESTMENT. MOREOVER, UNCERTAINTIES ARISING FROM INTERNATIONAL TRADE POLICIES, IN PARTICULAR US IMPORT DUTIES, CONTINUE TO PENALIZE MARKET DEMAND**
- **DESPITE THIS COMPLEX SCENARIO, MARZOCCHI POMPE HAS ONCE AGAIN DEMONSTRATED HIGH RESILIENCE BY MAINTAINING INDUSTRIAL MARGIN AT EXCELLENT LEVELS, A TANGIBLE SIGN OF OPERATIONAL EFFICIENCY**
- **THE COMPANY CONTINUED WITH DETERMINATION ON THE PATH OF INNOVATION THAT HAS ALWAYS DISTINGUISHED IT, INTRODUCING NEW PRODUCTS ON THE MARKET SUCH AS THE ELIKA SERIES MOTORS AND ENHANCING PRODUCTION CAPACITY THANKS TO THE IMPLEMENTATION OF THE NEW ASSEMBLY AND TESTING LINES AT THE ZOLA PREDOSA PLANT**
- **THESE KEY INVESTMENTS WILL STRENGTHEN MARZOCCHI COMPETITIVE POSITIONING AND PREPARE THE COMPANY FOR THE OPPORTUNITIES THAT WILL EMERGE AS DEMAND RECOVERS. AT THE SAME TIME, MARZOCCHI STARTED AN INTERNAL REORGANIZATION AIMED AT STREAMLINING OPERATIONS TO BE MORE FLEXIBLE AND READY TO FACE INCREASINGLY SHORT AND VOLATILE ECONOMIC CYCLES**
- **MARZOCCHI POMPE CONTINUES TO BE AT THE CUSTOMERS SIDE, WITH THE TARGET OF EXPANDING ITS PRESENCE BOTH GEOGRAPHICALLY AND IN TERMS OF APPLICATIONS, OFFERING TAILOR-MADE, HIGH-TECH SOLUTIONS, WHICH HAVE ALWAYS BEEN ITS DISTINGUISHING FEATURE. MANAGEMENT LOOKS TO THE FUTURE WITH CONFIDENCE GIVEN MARZOCCHI ABILITY TO FACE CHALLENGES AND GENERATE VALUE OVER TIME**



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

New «Green» Projects

- **Treedom 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 Operation Center

- In March 2022 Marzocchi Pompe, in partnership with Yarix, finalized a C SOC + Cynet project
- Marzocchi's *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





Appendix

- **Market & Competitive Positioning**
-

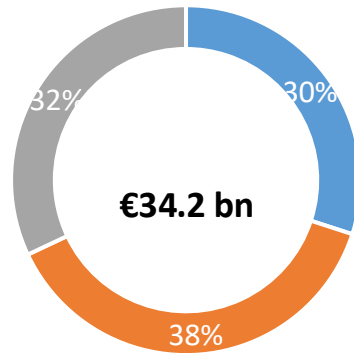
Fluid Power market and growth forecasts

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

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

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.

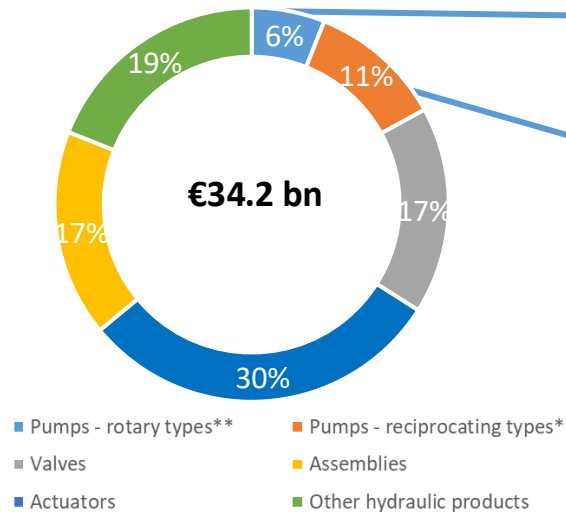
Note (2): ISC - International Statistics Committee project has the objective of providing comparable information on Fluid Power markets in Europe, USA and Asia.

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.

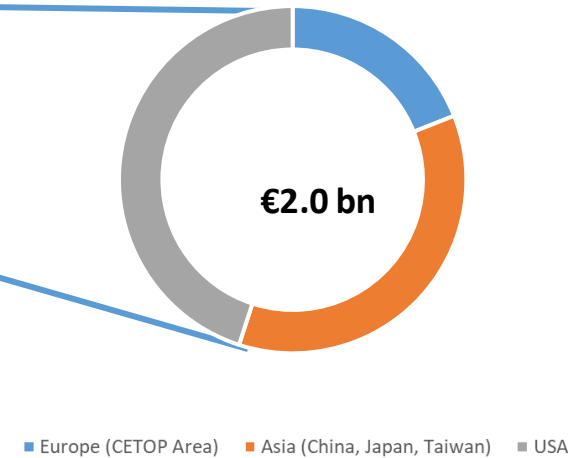
Focus on hydraulic pumps' market

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



Rotary pumps' global market



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

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

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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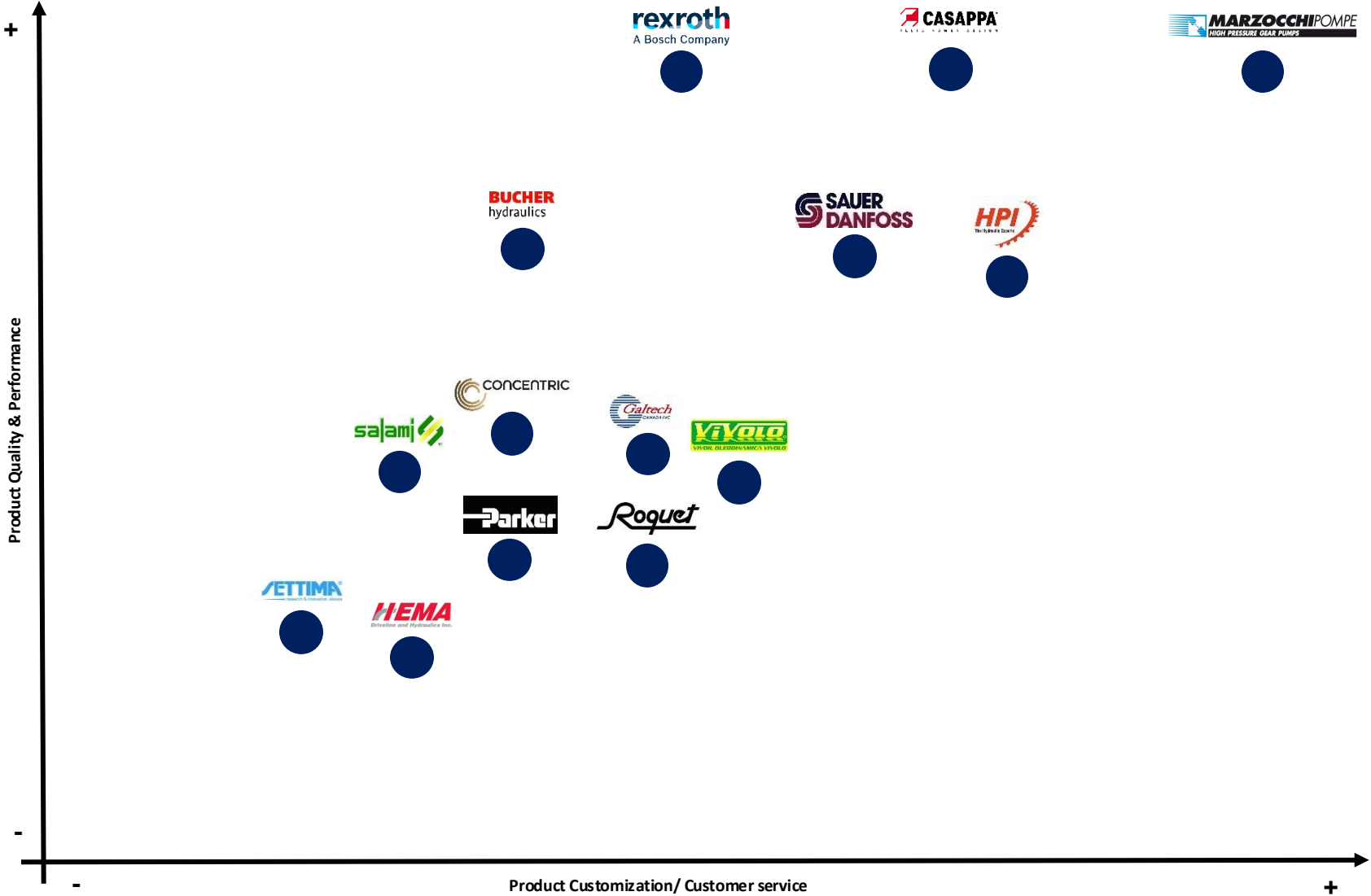
Competitive positioning

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

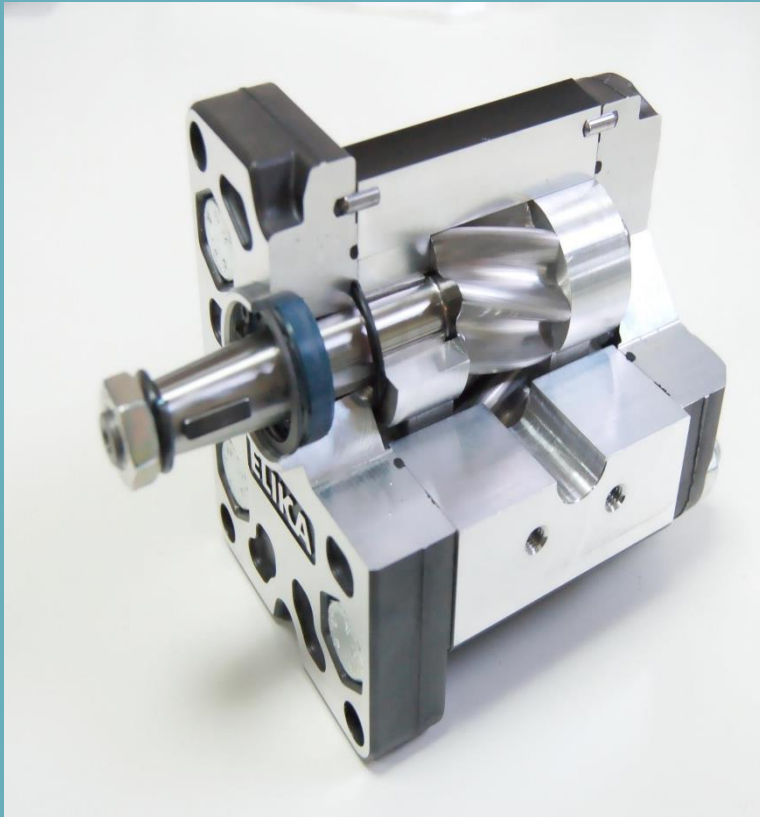
Source: Marzocchi Pompe SpA management estimates

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

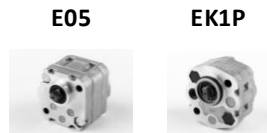
- The pumps have the function of transferring the fluid from a tank to an actuator within an oil-hydraulic circuit. (for example, a cylinder that drives the shovel of an excavator). This transfer from the suction circuit to the delivery circuit occurs through the rotation of the two toothed wheels (the 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

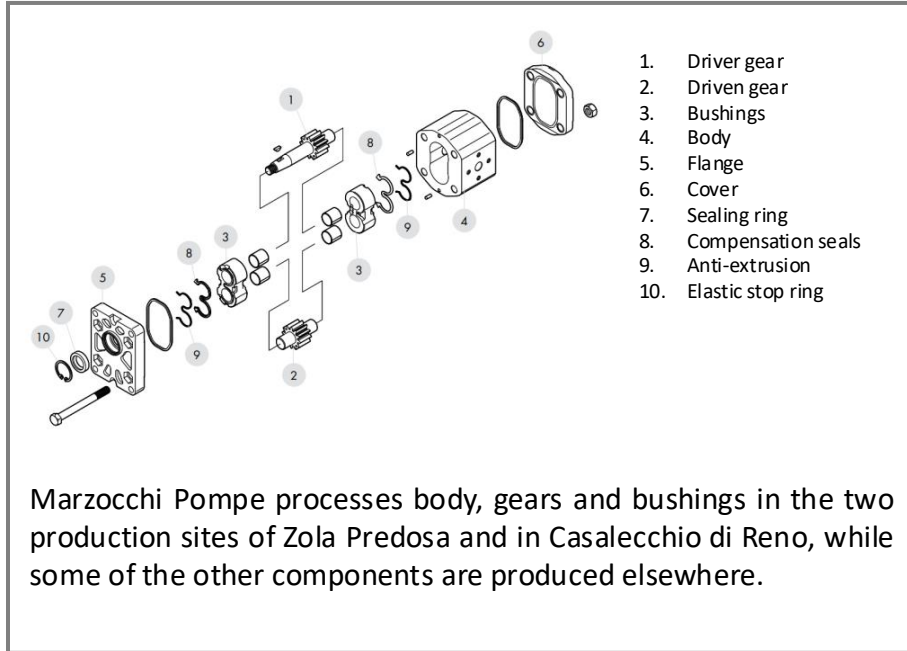
Elika is a helical toothed gear pump with a hydraulic system for balancing axial forces. It is a low noise and high efficiency product developed and patented by MP



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

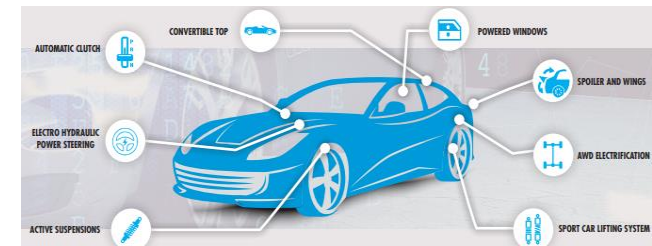


Mobile



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 85% of total 2024 revenues, including sales to distributors/*sales network*, which alone contribute to 36.2% of MP's total sales^(*)

FLUID POWER

Core



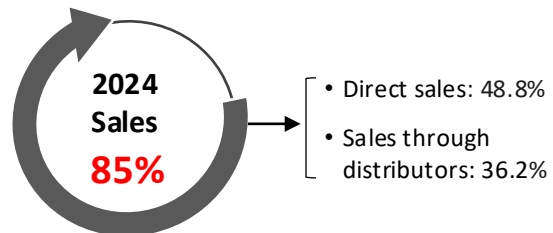
Industrial

Possible applications:

- Textile Machinery
- Machine tools
- Plastic Injection Machines
- Machines utilized in energy sector, especially renewable (wind, solar)

Clientele:

- Original equipment manufacturer



Mobile Machines

Possible applications:

- Earthmoving machinery
- Agricultural machinery
- Forklifts
- Gardening machinery

Clientele:

- Original equipment manufacturer



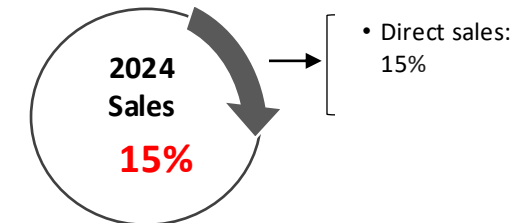
Automotive

Possible applications:

- Powertrain
- Power steering
- Asset regulators
- Suspensions

Clientele:

- Tier 1 supplier



^(*) 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 8.5% of sales and the top 10 representing 22.0%. 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 85% and 15% of total sales, respectively) according to the financial year's consolidated data of Dec. 31st 2024

Overview weight % top clients¹

	Industrial & Mobile ²		Automotive	
	Revenues 2024	%	Revenues 2024	%
Top 3	2.89 mln	8.5%	6.01 mln	100%
Top 10	7.50 mln	22.0%	6.01 mln	100%
Total	34.03 mln	100.0%	6.01 mln	100%

Note (1): Consolidated data.

Note (2): Revenues from distributors included.

93% 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:

- Minimum order volume, with penalties for violation of amount
- Pre-established price, mainly based on volumes ordered
- Price-adjustment according to previously established mechanisms, based on current raw materials' prices

Global distribution network

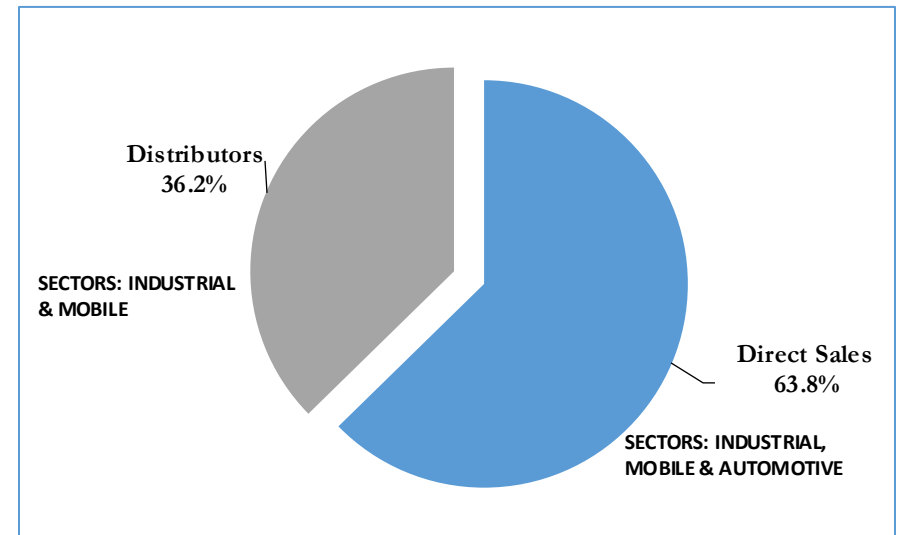
Marzocchi Pompe relies on an international distribution network present in **over 50 countries**. Products are distributed through various channels, such as direct sales, distributors, sales¹, American branch operations and Chinese branch operations

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 re-sellers**, selected based on their medium-high positioning, outstanding product quality, and high visibility of sold brands

2024 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

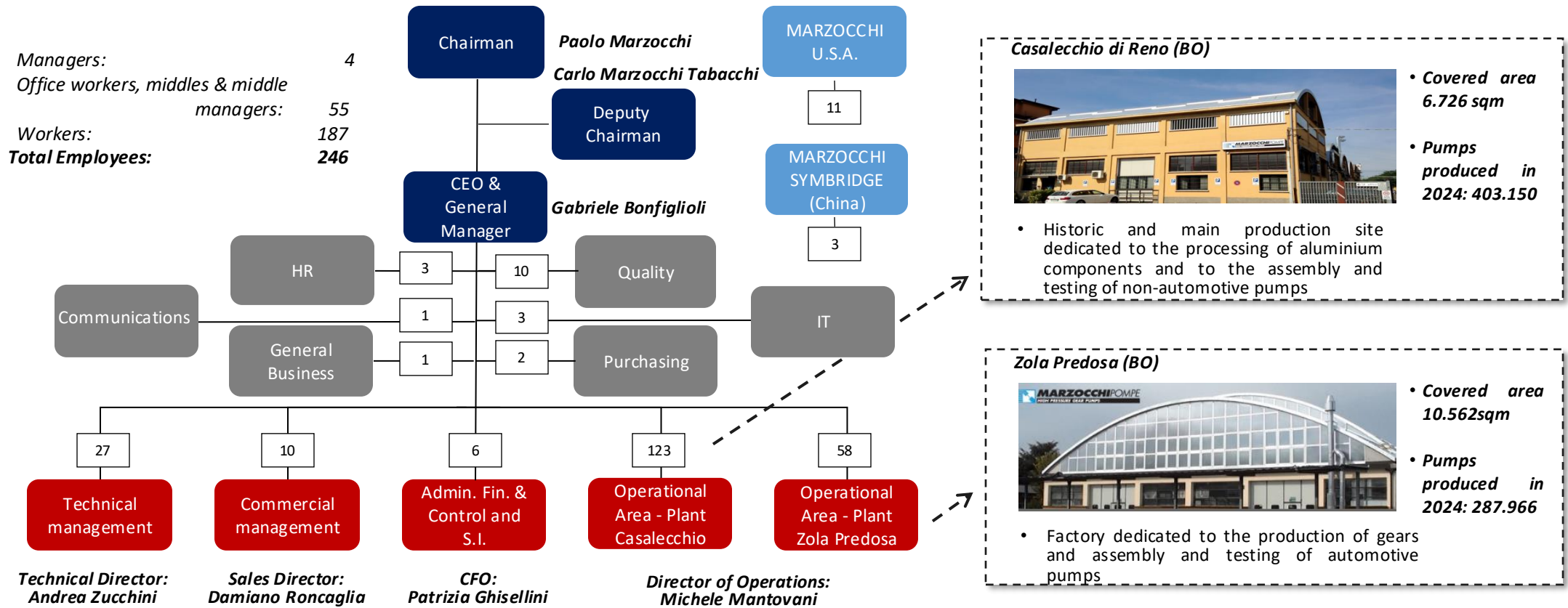
- EBITDA margin at 9.45% in 2024 (vs. the peak of 16.4% in 2023)
- High free cash flow (4.9M€ in 2024) allowing for a comfortable NFP Adjusted/EBITDA of 1.6x

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

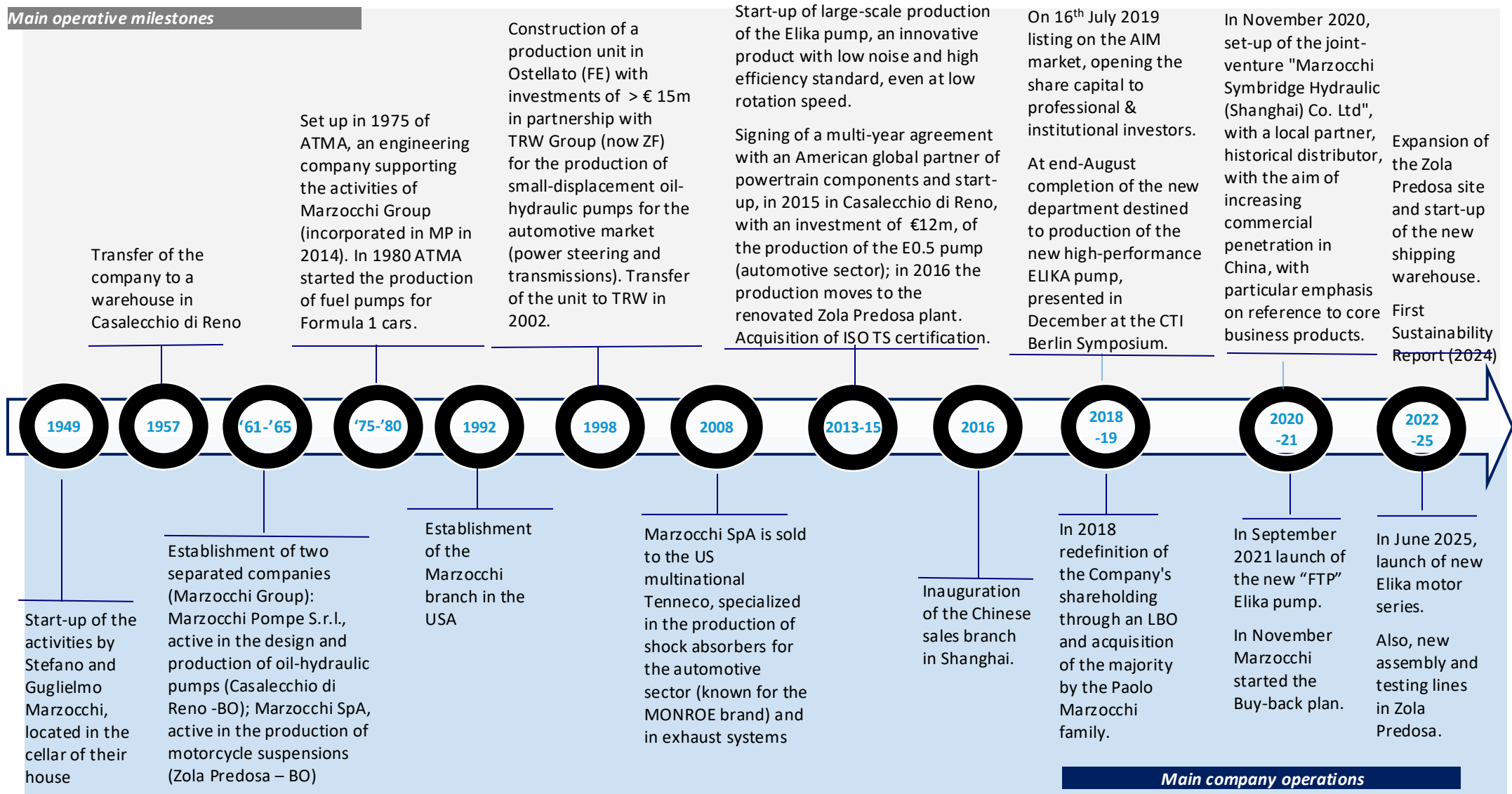
Organizational structure and production sites

- Marzocchi Pompe can count on a team of professionals with consolidated experience. **As of 30th of June 2025** the workforce consists of **246 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.

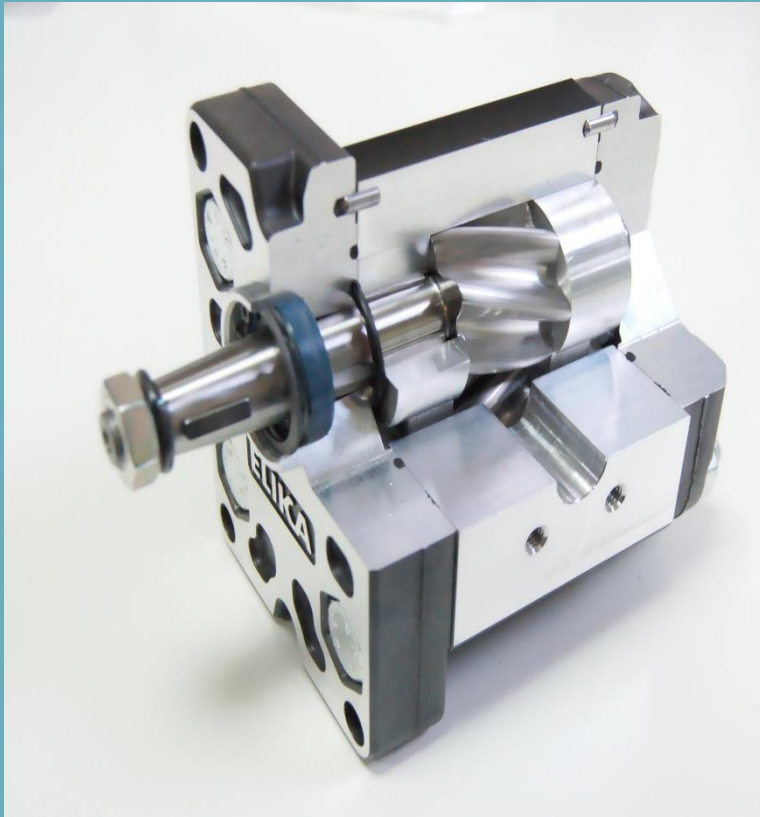


History

Main operative milestones



Main company operations



Appendix

- Financials

Consolidated Profit & Loss

<i>Euro 000</i>	30 June 25		30 June 24	
Revenue from sales	18,570	100%	22,017	100%
Changes in WIP	1,127		58	
Other revenue	284		412	
VALUE OF PRODUCTION	19,981		22,487	
Consumption of raw materials	(4,352)	(22.1%)	(4,998)	(22.6%)
Service costs	(5,735)	(29.1%)	(5,853)	(26.5%)
Rentals and leases	(260)	(1.3%)	(209)	(0.9%)
Sundry operating expense	(232)	(1.2%)	(243)	(1.1%)
ADDED VALUE	9,402	47.73%	11,184	50.67%
Personnel expense	(7,331)	(37.2%)	(7,953)	(36.0%)
Adjusted EBITDA¹	2,071	10.51%	3,231	14.64%
Amortization, depreciation and write-downs	(1,148)	(5.8%)	(1,455)	(6.6%)
Provisions for risks	0	0.00%	0	0.00%
Adjusted EBIT²	922	4.68%	1,776	8.05%
non-recurring income and expense	(1,412)	(7.6%)	0	0.00%
financial income and expense	(406)	(2.1%)	(337)	(1.5%)
adjustments to financial assets	(84)	(0.4%)	(18)	(0.1%)
PROFIT (LOSS) BEFORE TAX	(979)	(5.0%)	1,422	6.44%
Income tax for the year	200	1.02%	(108)	(0.5%)
NET PROFIT (LOSS)	(779)	(4.0%)	1,313	5.95%

Adjustment of € 1.41 million to item Personnel expense 1H2025 for non-recurring costs broken down as follows:

- € 0.86 million for leave incentives;
- € 0.55 million for wages, salaries and contributions for the period which although incurred in the first half of the year will not be replicated from the second half of 2025.

² Net of revaluation amortization arising from the merger transaction from the LBO carried out in 2018. (National accounting standards + IAS 17)

Consolidated Balance Sheet

<i>Euro 000</i>	30 June 25	31 December 24
A) NET FIXED ASSETS	18,016	17,407
Intangible fixed assets	541	592
Tangible fixed assets	16,765	15,982
Financial fixed assets	710	833
B) NET WORKING CAPITAL	15,164	16,984
Inventory	11,462	9,963
Assets held for sale	0	0
Customer advances	(18)	(171)
Trade receivables	8,213	7,772
Other receivables	5,541	7,775
Trade payables	(4,760)	(4,205)
Other payables	(3,448)	(2,956)
Provisions for risks and charges	(1,982)	(1,168)
Other assets/liabilities	156	(26)
C) GROSS CAPITAL EMPLOYED	33,181	34,391
D) POST-EMPLOYMENT BENEFITS	(1,194)	(1,189)
E) NET CAPITAL EMPLOYED	31,987	33,202
covered by		
F) EQUITY CAPITAL	(20,758)	(21,880)
G) NET FINANCIAL POSITION	(11,229)	(11,321)
Medium-long term financial payables	(11,054)	(10,969)
Short-term financial payables	(5,839)	(5,038)
Cash	5,665	4,685
H) TOTAL SOURCES OF FUNDING	(31,987)	(33,202)

(National accounting standards + IAS 17)

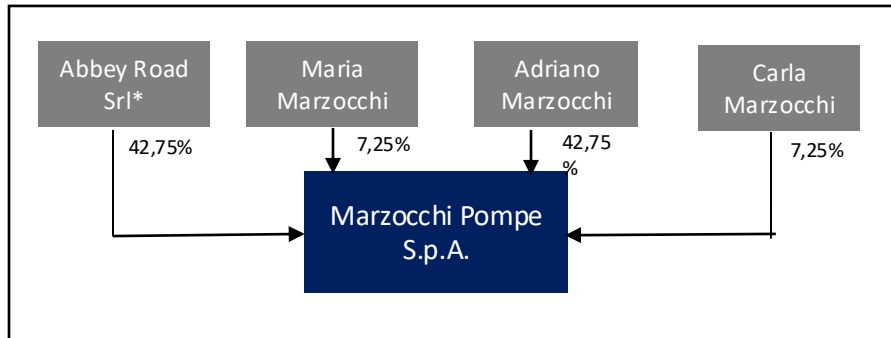
Consolidated Cash Flow Statement

€/000	30 June 25	31 December 24	30 June 24
EBIT	(489)	968	1,776
Tax effect	200	(78)	(108)
Change in provisions	818	57	(62)
Amortization, depreciation and write-downs	1,148	2,667	1,455
Cash flow from earnings	1,677	3,614	3,061
Changes in working capital			
Inventory	(1,499)	2,831	364
Trade receivables	(617)	(291)	(1,509)
Other receivables	2,234	(2,443)	(2,049)
Payables to suppliers	555	(1,586)	(1,113)
Other payables	310	75	558
Changes in working capital	983	(1,413)	(3,749)
Free cash flow	2,660	2,201	(688)
Net investment in tangible and intangible fixed assets	(1,858)	(3,233)	(1,861)
Change in other fixed assets	123	(5)	59
Adjustments to financial assets	(84)	45	(18)
Cash flow from investing activities	(1,819)	(3,193)	(1,820)
Financial expense/income	(406)	(605)	(337)
Increase/(decrease) in share capital	0	0	0
Other changes in equity	(343)	(1,381)	(1,285)
Cash flow from financing activities	(749)	(1,986)	(1,621)
Net cash flow	93	(2,978)	(4,129)
Net financial position beginning of period	(11,321)	(8,343)	(8,335)
Net financial position end of period	(11,229)	(11,321)	(12,464)
Net increase (decrease) in cash	93	(2,978)	(4,129)

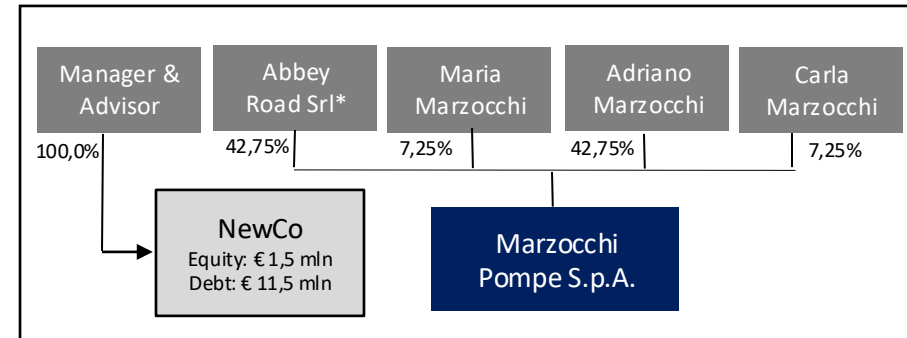
Focus on family and management Buy-out

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.

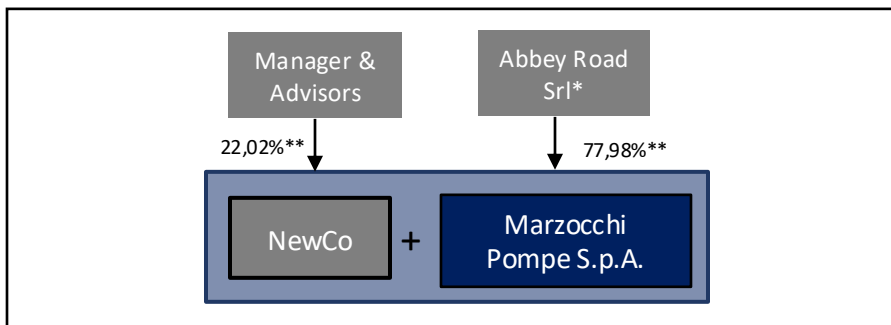
1 Shareholding Marzocchi Pompe pre-LBO



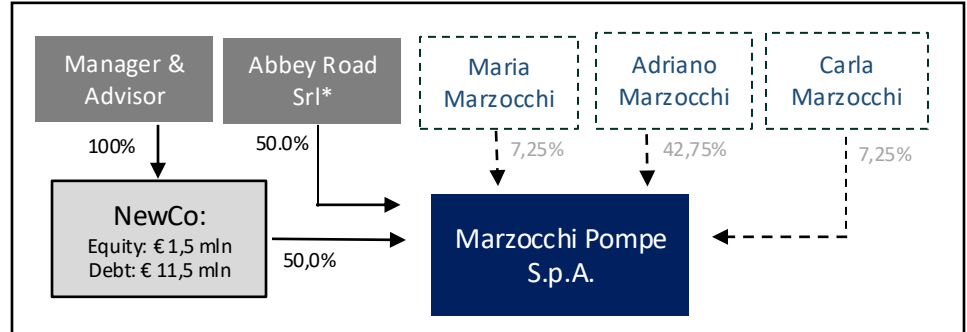
2 Management and advisor create a NewCo for the acquisition of Adriano and Carla Marzocchi's shares (42,75%+7,25%) with € 13 mil (Equity + Debt)



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 di Bologna

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