



FY 2025 Business Results Presentations



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Agenda

Key Messages

2025 - Results

Company Profile

An aerial photograph of an industrial facility, possibly a manufacturing plant or warehouse complex, with a large blue-tinted overlay. The facility features several large buildings, parking lots with numerous vehicles, and a central circular area. The text "Key Messages" is centered over the image in white.

Key Messages

Outlook & Investment

Hot-Melt coating line – go-live Jan-2027: replaces legacy assets; improves efficiency and product quality while significantly increasing production capacity; ESG-aligned..

Body Care capacity – by YE: additional machinery in operation to support structural demand growth.

Operational excellence: focused actions on setup, maintenance/OEE and lead time to raise productivity and service levels.

Commercial focus: align product mix to higher-value niches; faster time-to-market on specialty tapes and Body Care formats.

Outlook: actions in place to improve mix, efficiency and returns as markets normalize and new investments come onstream.

Revenue Growth: +5%+8% annually (FY 2026–2027)

EBITDA Margin: between 13% and 14% in FY 2026, with further improvement expected in FY 2027

Our Strategic Strengths

We leverage on two complementary business segments, strong export performance, advanced and flexible production capabilities, and continuous innovation supported by a dedicated R&D team and a growing patent portfolio.

Innovation: We have four technicians in our R&D department dedicated to enhancing our product portfolio and ensuring we are ready to respond to market demand. Over the last year, we filed ten patents in both the packaging and Body Care sectors. Every day, our team works to develop more efficient and advanced products.

Efficient capacity allocation across segments: Our flexibility allows us to switch production between the Body Care and Packaging segments, as most of our machinery can be used for both product lines. This adaptability is a key strength, enabling us to adjust production programs quickly in response to market demand.

A Modern and Efficient Industrial Platform: our production plant is equipped with modern, technologically advanced machinery, the result of a major investment campaign carried out between 2018 and 2020.

Our Strategic Positioning: two distinct business segments: Body Care (28% of revenues) and Packaging (72% of revenues). We export 66% of our production both within Europe and outside Europe. One of our key strengths is that both segments are served using the same production lines, allowing us to optimize efficiency and maximize capacity utilization.

Strategic Actions to support growth

Adhesive Tapes

Focus on consolidating our position in the European market, particularly on high value-added products such as printed tapes and specialty solutions.

Strengthening our portfolio by prioritizing premium and differentiated items that enhance margins and customer retention.

Development of strategic partnerships with potential new customers, centered on tailored projects and customized product solutions.

Continued interest in expanding into the U.S. market, while carefully considering current geopolitical and fiscal dynamics.

Ongoing discussions with a couple of prospective distributors who are expected to initiate collaboration and support market expansion.



Strategic Actions to support growth

Body Care

Consolidate our position in strategic markets

In Europe, growth in the incontinence segment driven by the rising average age of the population allows Magis to maintain a stable presence, supported by high flexibility and rapid responsiveness to strategic customers, with whom long standing relationships of mutual trust have been built.

In North Africa, continuous investments in the baby care market enable Magis to sustain a strong presence, strengthened by a solid brand reputation developed over the years.

Strengthen our global market share

Magis continues to monitor global market developments to capture new partnership opportunities with key industry players, leveraging on its know how to offer tailor made solutions and to continuously expand its product portfolio.

Continuously improve service quality

Magis aims to provide partners with comprehensive and timely solutions, supported by deep expertise developed in the industry.



Europe



North Africa

An aerial photograph of an industrial facility, likely a manufacturing plant, with a large blue-tinted overlay. The facility features several large buildings with flat roofs, parking lots with numerous vehicles, and a central circular area. The text "2025 Results" is prominently displayed in white on the blue overlay.

2025 Results

Highlights FY2025

Results exceeded the September guidance across all key metrics. Revenues, EBITDA and the EBITDA margin were all above the estimates communicated to the market, with a clear acceleration expected in 2026.

Strong resilience and adaptability in a complex market, driven by innovation and diversification.

During 2025, we launched a share **buyback** program as an efficient use of the cash generated by ordinary operations, supporting stock-option incentive plans, potential extraordinary transactions, and other initiatives aligned with sound financial management and the company's strategic priorities. The company authorized purchases up to a maximum amount of €800,000. By the end of 2025, a total of 9,797 shares had been bought back, representing 0.168% of the share capital.

Challenging year marked by a significant increase in raw material costs within a particularly difficult economic environment for the packaging market. Body Care grew by 5,31%, supported by the new laminator line entering into operation and by an expanding market. Body Care now accounts for 28% of our revenues, compared to 25% in the previous year.

Profitability & cash: EBITDA margin 11.1%; Net Cash €7.49m at year-end, after dividend distribution, capex and client-supportive credit actions.

ESG & innovation: continuous product/process innovation (ESG-aligned) to respond faster to customised and sustainable solutions.

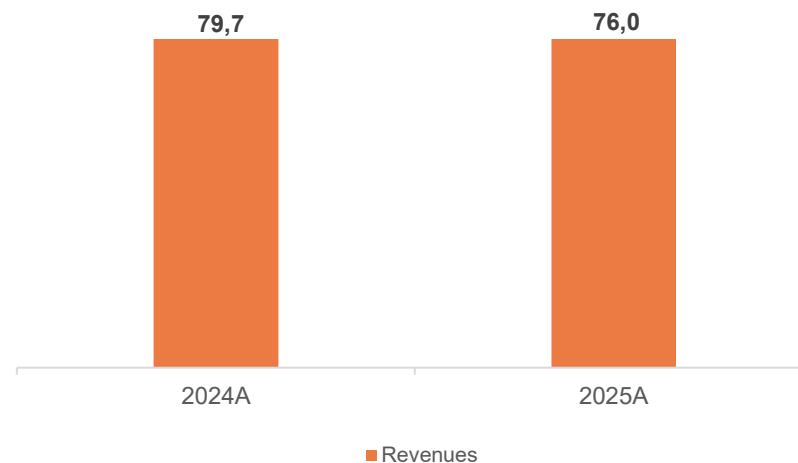
Strategic Growth and Capacity Expansion: We remain focused on identifying and evaluating new M&A opportunities and expanding our production capacity through a new investment in a coating line that will support our future growth.

Agility & mix: ongoing efficiency improvements and capacity shift towards Body Care and specialty tapes to capture higher demand and margin opportunities.

2025 - KPIs

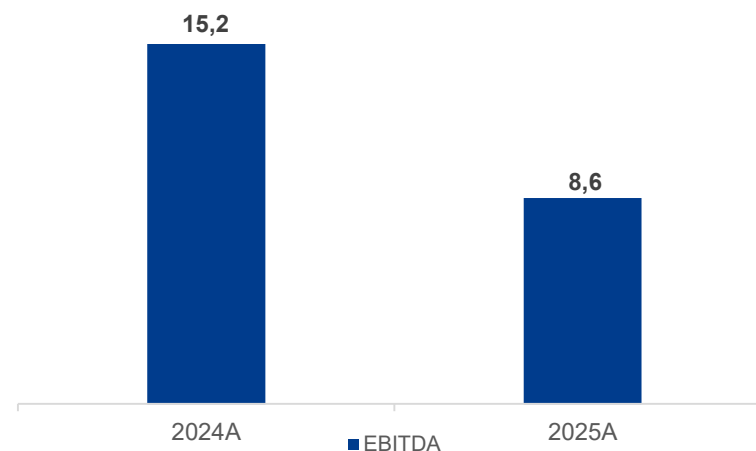
Revenues

In 2025 we recorded a slight decrease in revenues due to a challenging market environment, particularly in the packaging sector, combined with rising raw material costs. We chose to support our customers during this difficult period by maintaining our volumes and avoiding passing the full impact of raw material increases onto prices. The Body Care sector grew by 5.31% compared to 2024, and we have a solid pipeline for the current year, supported by our investment in new machinery and the new laminator line.



EBITDA

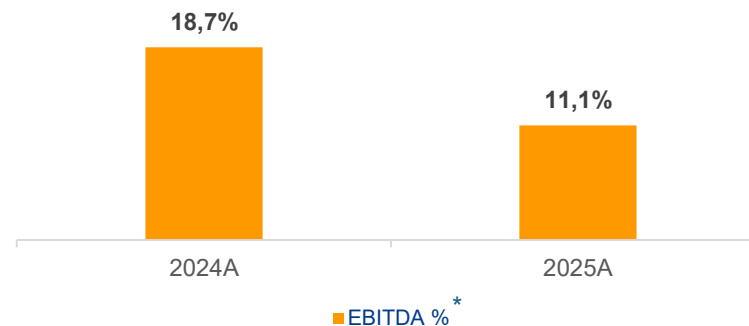
Thanks to the effective selective focus of the business, EBITDA as of 31 December 2025 amounted to €8.6 million, equal to 11.1% of revenues. In the first half of the year, tensions in the supply of raw materials led to an increase in their cost. This impact was partially mitigated through a prudent purchasing policy and the use of previously acquired inventories. Depreciation increased as a result of investments made during the year. The rise in costs was not entirely passed on to selling prices, in line with a commercial strategy aimed at preserving volumes and competitiveness.



2025 - KPIs

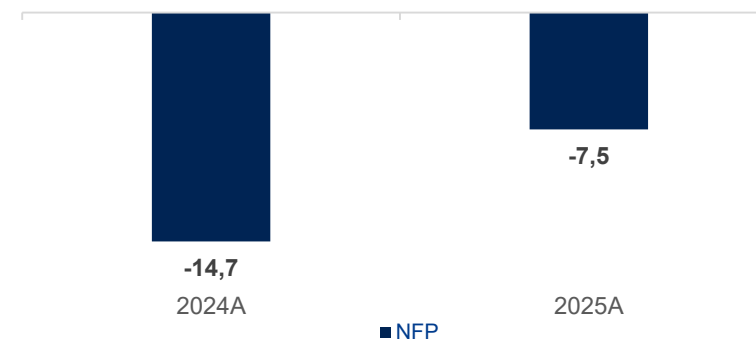
EBITDA Margin

In the 2025, we focused on selling premium products and premium customers in a challenging market. Thanks to our two divisions and the breadth of our product portfolio, we maintained a favorable position.



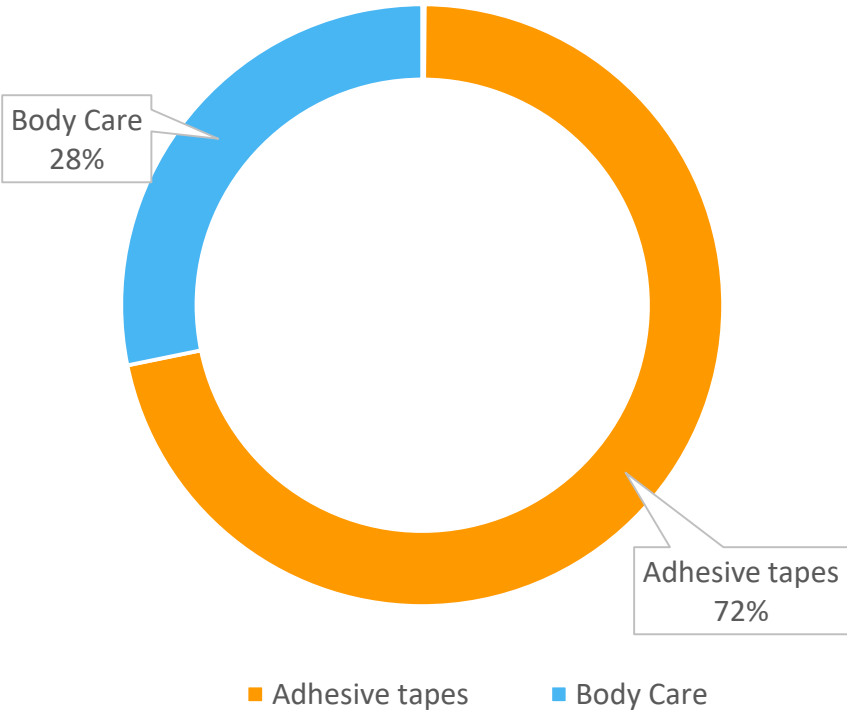
NET FINANCIAL POSITION

The Net Financial Position reflects a cash absorption mainly driven by the dividend distribution and by the investments carried out during the year. Despite these outflows, the Company maintained a solid liquidity position, confirming its financial stability and continued ability to invest in technologically advanced machinery.

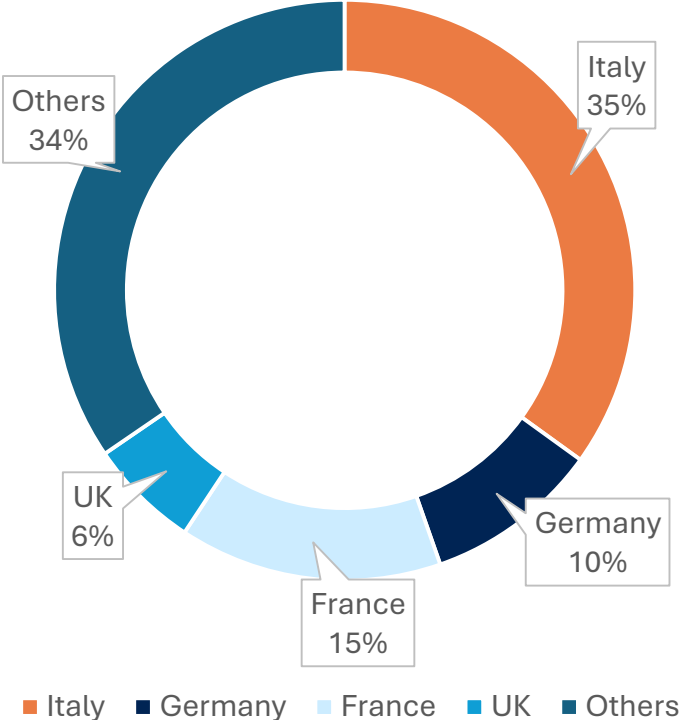


Revenues Breakdown

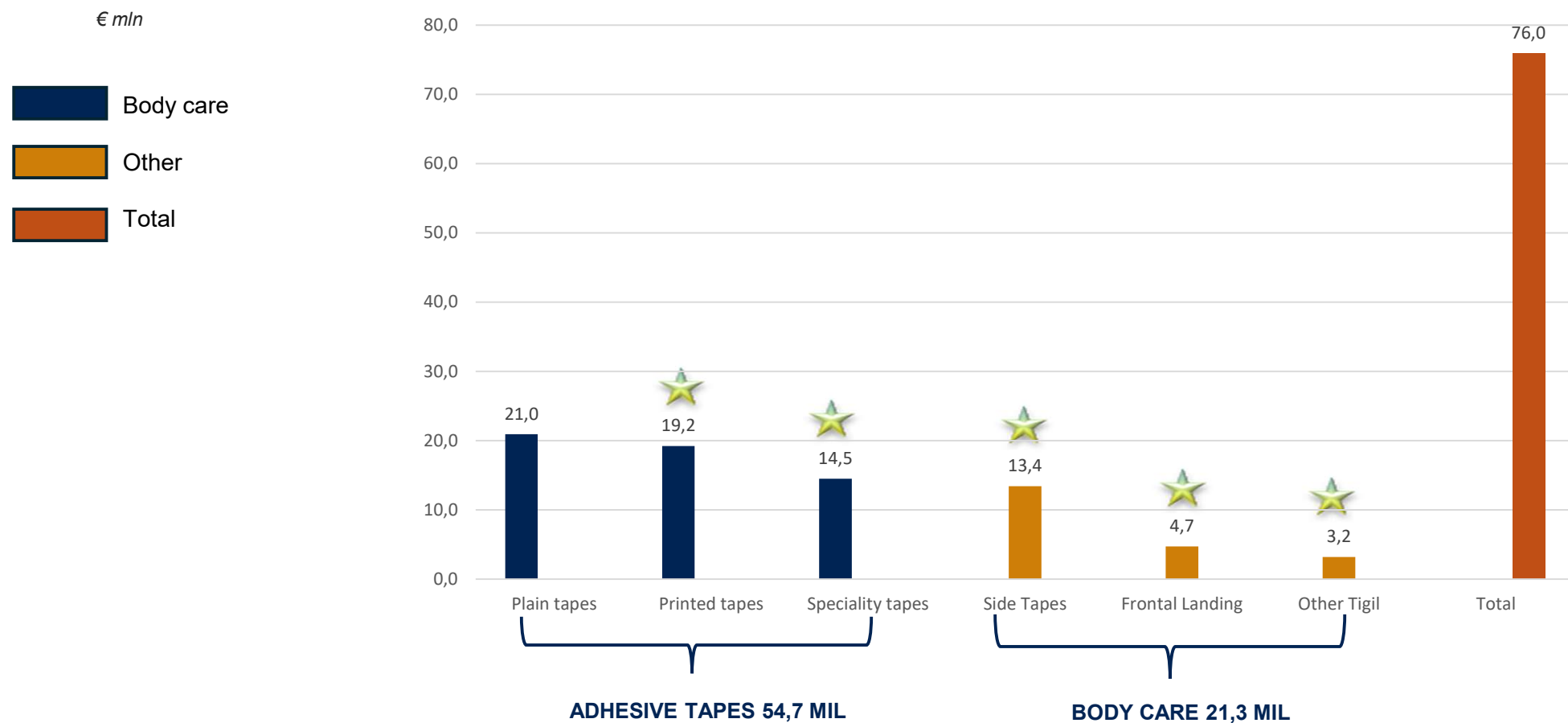
Revenues by product



Revenues by Geographic Area



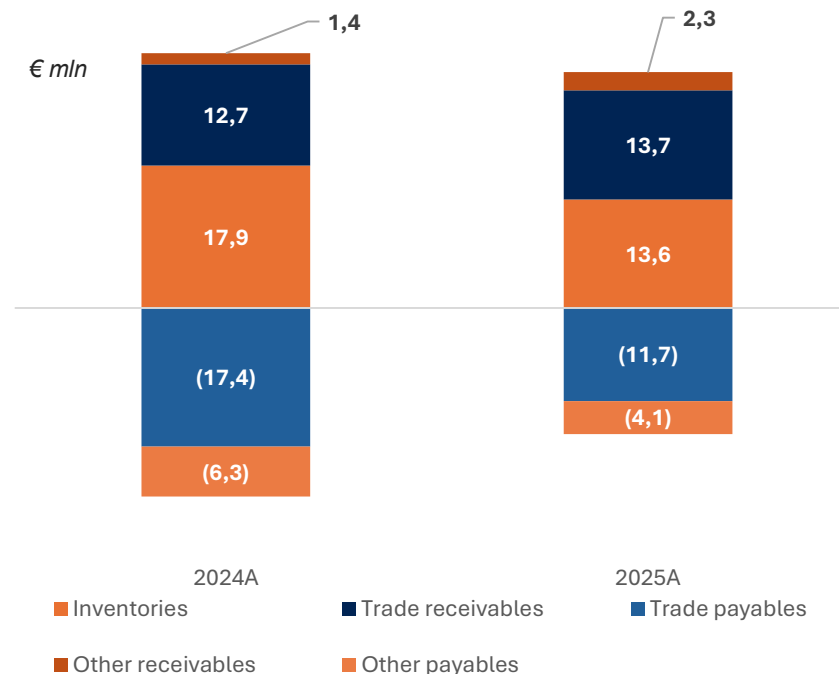
Revenue Breakdown by Product – 2025



PRINTED TAPE AND BODY CARE ARE THE HIGHEST-MARGIN PRODUCTS

Net Working Capital

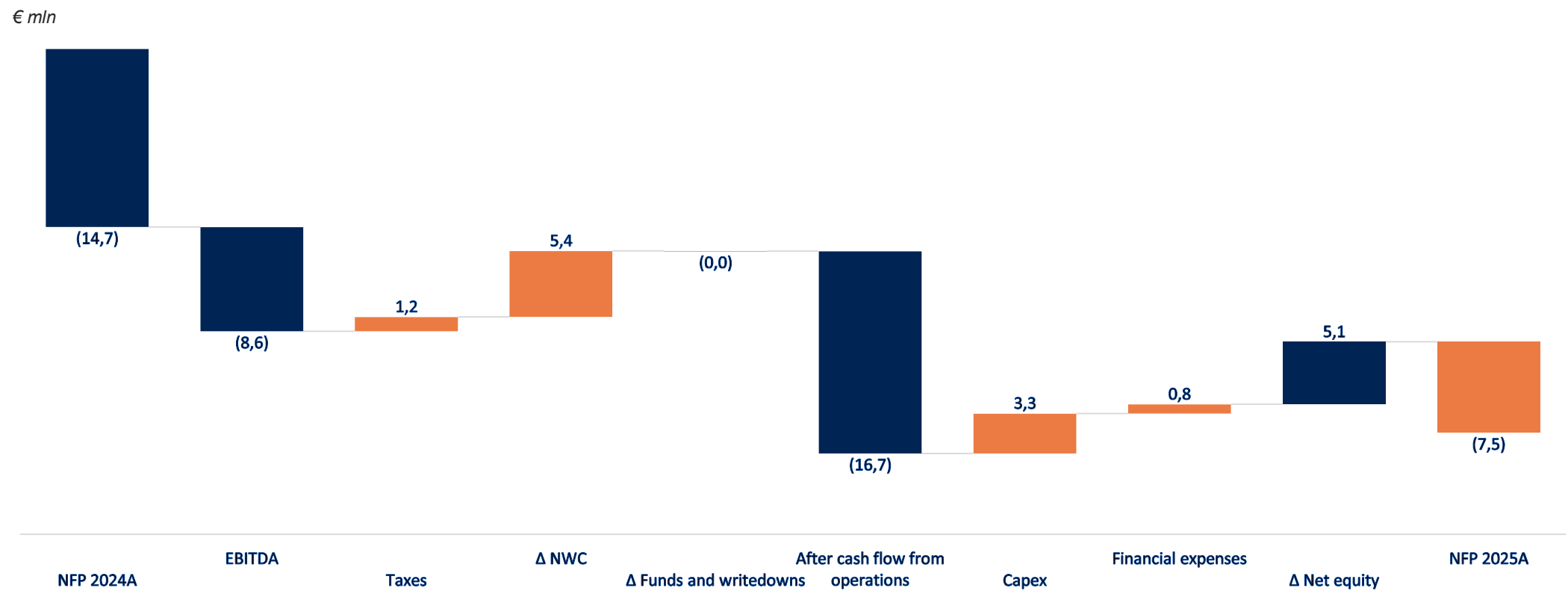
- **Trade receivables** The increase in trade receivables reflects the commercial strategy introduced in 2025 to navigate a delicate macroeconomic environment impacting both premium and new customers. As part of this strategy, we ran a customer acquisition campaign with temporarily more attractive payment terms. This effect is gradually normalizing in 2026.
- **Inventories** Inventories decreased as a significant portion of materials was used for in-house production.
- **Trade payables** Trade payables decreased due to a strategic purchasing plan implemented with suppliers to enable faster payments, obtain special discounts, and mitigate the rise in raw-material prices. In 2026, we can choose whether to maintain this strategy or return to longer payment terms, as both options are available with most suppliers.
- This strategy influenced the 2025 **DSO** and **DPO** ratios, which reflect the changes in payment terms adopted during the year. The decrease in **DIO** reflects an improved inventory efficiency, supported by the use of existing stock and a more effective utilization of raw materials in production



DAYS	2024A	2025A
DSO	57	65
DPO	108	74
DIO raw materials	89	58
DIO WIP and finished goods	34	41

Notes: (1) $DSO = \frac{\text{Trade receivables}}{\text{Revenues}} \times 365$; (2) $DPO = \frac{\text{Trade payables}}{\text{Costs of RM} + \text{Costs for services}} \times 365$; (3) $DIO \text{ raw materials} = \frac{\text{Inventory RM}}{\text{Costs RM} + \Delta \text{ inventory RM}} \times 365$; (4) $DIO \text{ SF and FP} = \frac{\text{Inventories SF and FP}}{\text{Costs of RM} + \text{Costs for services} + \Delta \text{ inventories SF and FP}} \times 365$

NFP 2025 walkthrough



P&L 2025 – ITA GAAP

Revenue in 2025 revenues slightly declined due to market challenges in Packaging and rising raw material costs. We supported our customers by keeping volumes stable and limiting price adjustments. Body Care grew by 5.31% vs 2024, and we expect further progress thanks to our new machinery and the new laminator line.

Change in Inventories Lower raw material inventories reflect higher consumption during the year and a more efficient working-capital management.

Cost for services remained stable: the increase in gas prices was balanced by lower electricity expenses. Transportation costs rose slightly. We maintain strict monthly monitoring of all cost items through our budget process.

Personnel Expenses

Personnel expenses remained stable. Our workforce consists of highly specialized blue collar employees, and we decided to maintain the same number of staff to support our growth.

(Training a new blue-collar specialist for the Body Care sector or for the coating line requires between six and twelve months to become fully independent.

Amortization Amortization showed a slight increase, driven by the new capital expenditures.

Financial Expenses The variation in financial expenses is mainly attributable to the estimated foreign-exchange loss recorded at year-end on the USD current account balance, following its remeasurement at the EUR closing exchange rate.

The year closed with a positive profit, even in a highly challenging market environment.

PROFIT AND LOSS ACCOUNT	2024A	2025A
Revenues from sales and services	79.745	75.989
Changes in inventories of work in progress, semi-finished and finished products	3.104	(29)
Increases in fixed assets for internal work	523	267
Other revenues and income	1.810	1.366
Value of production	85.181	77.592
Costs for raw materials, consumables and goods	(50.568)	(42.443)
Change in inventories of raw, ancillary and consumable materials and goods	2.949	(4.230)
Costs for services	(10.337)	(10.451)
Costs for the use of third party assets	(1.821)	(1.798)
Personnel expenses	(9.810)	(9.759)
Miscellaneous operating expenses	(360)	(311)
EBITDA	15.234	8.600
<i>Write-downs of receivables included in current assets and cash and cash equivalents</i>	-	-
<i>Amortisation</i>	(465)	(521)
<i>Depreciation</i>	(2.661)	(3.001)
Amortisation, depreciation and write-downs	(3.126)	(3.522)
EBIT	12.108	5.079
Financial income and expenses	(488)	(757)
Adjustments to financial assets and liabilities		
Net extraordinary income and expenses		
EBT	11.620	4.322
Current, deferred and prepaid income taxes for the year	(2.940)	(1.175)
Profit	8.680	3.147

Balance Sheet 2025

ITA GAAP

Net Working Capital and Cash Generations

In 2025 Net Working Capital increased from €8.3 million to €13.7 million, absorbing financial flows as a result of an operating management approach aimed at preserving sales volumes and competitiveness and, on the supplier side, mitigating the increase in raw-material prices. For 2026, a solid cash-generation capability is expected, supported by an improvement in Net Working Capital across customers, suppliers, and inventory.

Equity At 31 December 2025, Equity amounted to €45.2 million, showing a decrease of €2 million compared to 2024.

Net Financial Position

The Net Financial Position shows an absorption of €7.2 million, moving from €14.67 million in 2024 to €7.48 million in 2025. This change is significantly influenced by the distribution of €5 million in dividends to shareholders, relating to the results of the last three financial years and €3 million investments in strategic machineries. Despite this outflow, the Company maintained a solid net cash position (€7.48 million) and continued to invest in technologically advanced machinery.

Balance Sheet	2024A		2025A	
	€ '000	% NIC	€ '000	% NIC
Intangible fixed assets	3.026		2.878	
Tangible fixed assets	21.701		21.614	
Financial fixed assets	5		5	
Total fixed assets	24.732	76%	24.498	65%
Inventories	17.875		13.616	
Trade receivables	12.677		13.670	
Advance payments	-		(17)	
Trade payables	(17.420)		(11.709)	
Trade Working Capital	13.131	40%	15.560	41%
Tax credits	611		1.362	
Deferred tax assets	-		-	
Receivables from others	43		30	
Accrued income and prepaid expenses	750		894	
Tax debits	(2.066)		(317)	
Payables to social security institutions	(657)		(601)	
Other payables	(1.369)		(1.243)	
Accrued expenses and deferred income	(2.180)		(1.977)	
Net Working Capital	8.263	25%	13.708	36%
Provisions for risks and charges	(362)		(385)	
Employees leaving entitlement	(118)		(108)	
Net invested capital	32.515	100%	37.713	100%
Net equity	47.193	145%	45.197	120%
Bonds	3.055		712	
<i>due within the next financial year</i>	1.759		712	
<i>due after the following year</i>	1.296		-	
Bank loans and borrowings	4.746		5.470	
<i>due within the next financial year</i>	2.352		2.098	
<i>due after the following year</i>	2.394		3.372	
Liquid assets	(15.286)		(6.361)	
<i>Bank and postal deposit</i>	(15.059)		(6.167)	
<i>Cash and cash equivalents</i>	(1)		(1)	
<i>Receivables from others</i>	(226)		(193)	
Financial Assets Not Constituting Fixed As	(7.193)		(7.306)	
Net Financial Position	(14.677)	-45%	(7.484)	-20%

Cash Flow 2025

Cash from operating activities

OCF Operating cash flow is influenced by the variation in Net Working Capital, which absorbs or releases cash from receivables, and payables.

FCF Free Cash Flow is also affected by €3 million of capital expenditures.

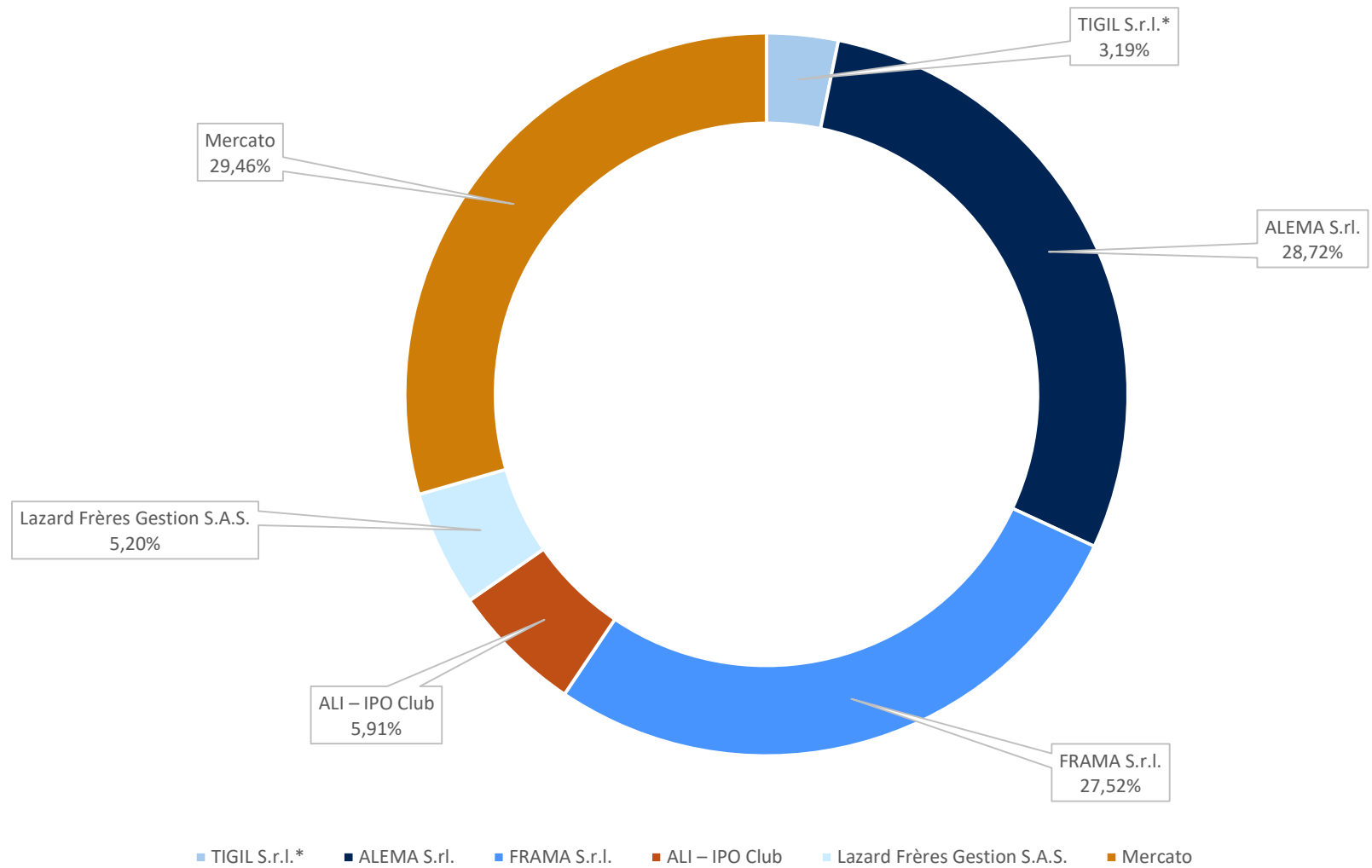
NCF Cash flow is influenced by the dividends distributed, which are reflected as a reduction in equity and an absorption of liquidity.

Despite these impacts, the Net Financial Position remained positive, reflecting the Company's strong financial solidity.

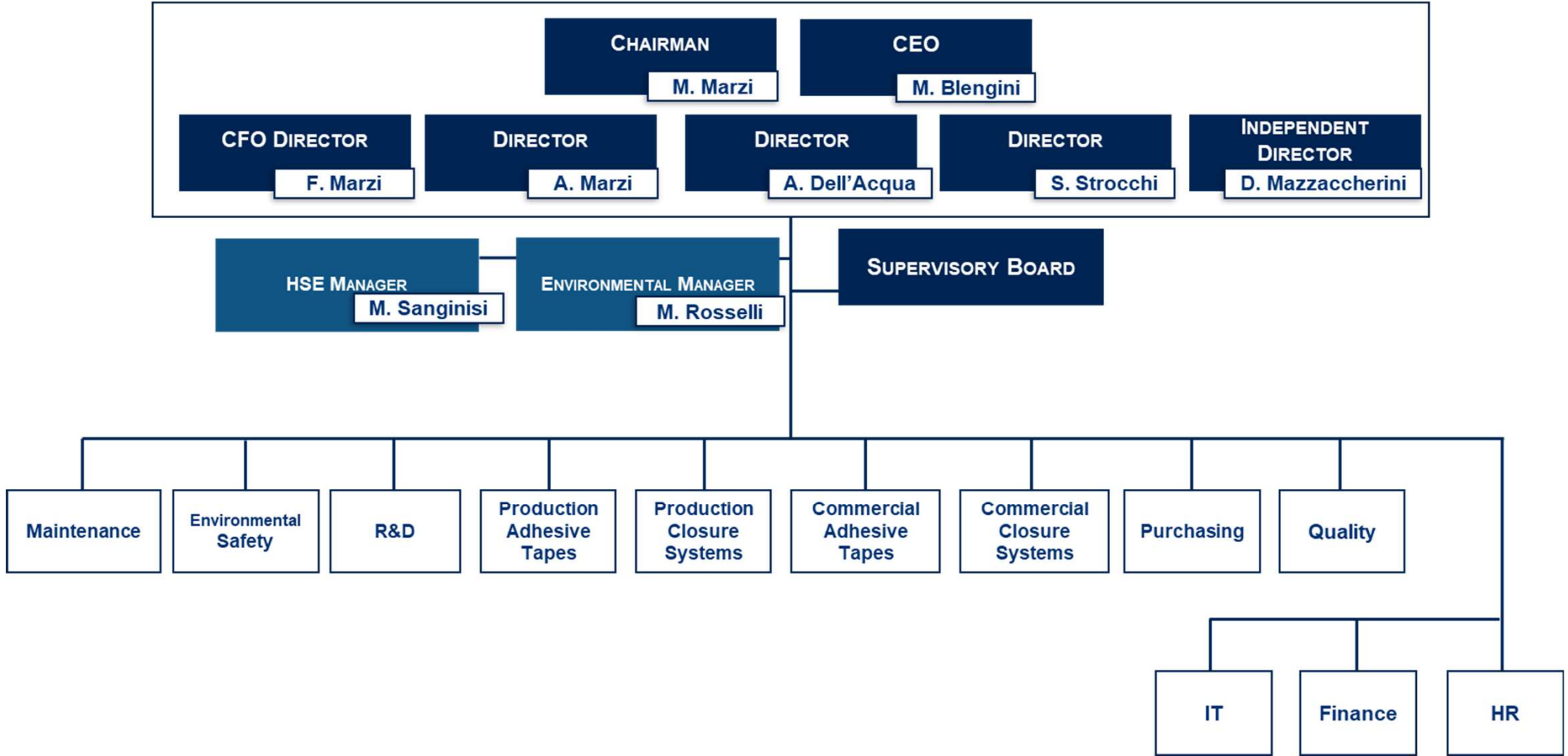
Cash flow	2024A	2025A
EBIT	12.108	5.079
Current, deferred and prepaid income taxes for the year	(2.940)	(1.175)
Amortisation, depreciation and write downs	3.126	3.522
- Δ NWC	2.380	(5.444)
Δ Funds	(142)	13
Operating cash flow	14.532	1.994
- Capex	(5.148)	(3.288)
<i>Intangible Capex</i>	(243)	(373)
<i>Tangible Capex</i>	(4.905)	(2.915)
(investments)/disposals of financial assets	-	-
Free Cash Flow	9.383	(1.294)
Financial income /(expensive)	(488)	(757)
Δ Net equity	12	(5.142)
Net Cash Flow	8.908	(7.193)
NFP start of year	(5.769)	(14.677)
Net Cash Flow	(8.908)	7.193
NFP end of year	(14.677)	(7.484)


Company Profile

Shareholder Structure



Our Governance Model



 Area Manager

Positioning along the value chain: internal management of the entire production process



SUPPLIERS

SUPPLIERS OF RAW MATERIALS FOR ADHESIVES (RUBBERS, RESINS, OILS)

SUPPLIERS OF SUPPORT MATERIALS (PLASTIC FILMS, CARDBOARD SLEEVES, COLOURS)

OTHER SUPPLIERS

Plastic film **Paints** **Rubbers, resins, oils** **Printers**

Substrates on reels, Hot Melt or Acrylic printing and glue coating, design customisation if required, reel cutting and final product composition

Cutting of product reels according to production requirements



DIRECT BUSINESS RELATIONS

~ 40% revenues 2025A

Prevalent distribution system in Italy

DISTRIBUTORS OF PACKAGING MATERIALS

~ 60% revenues 2025A

Prevalent distribution system abroad

Logistics

Food & Beverage

Pharma & BPC

LSRT⁽¹⁾

Electronics

Apparel

Baby care

Product Portfolio

ADHESIVE TAPES



BOPP, BOPET

Packaging, fixing and canning



DUCT TAPE

Waterproof fixing and insulation (gardening, plumbing, etc.)



CREPE/KRAFT TAPE

Paper ribbons for packaging



FREEZER TAPE

Semi-finished products in freezer production



MOPP TAPE

Assembly of heavy materials, adhesive handles, for the bottling and packaging industry

BODY CARE



SIDE TAPE

Side hooks used for nappy fasteners



WRAPPING FILM

Wrapping for sanitary towels and sealing band



FRONTAL TAPE & LANDING ZONE

Form the front of the nappy; can be produced in standard or customised designs



DISPOSAL TAPE

Fixing tapes for the adult incontinence product market

72% Revenues 2025

Marketed through brands **Magis & Argo Tape**

PATENTS

2626-1-IT	2664-1-EP
2626-2-IT	

PET tape, including ECO-HIT19

2895-1-IT	2948-1-IT
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Reinforced paper tape

2949-2-IT	2993-2-IT
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Self-adhesive and adhesive packaging tape

28% Revenues 2025

Marketed under the **Tigil** brand

Closure systems for nappies and packaging components in the baby care, adult care, pants' solution and fem care segments

ACTIVE PATENTS

Multilayer material	
2319-1-IT	2752-1-EP
	2486-1-IT

Present on all tape technologies except solvent-based and on all materials except PVC

■ Magis' perimeter
 ■ Uncovered perimeter

SUPPORTING MATERIALS

PP POLYPROPYLENE	PET POLYETHYLENE TEREPHTHALATE	PAPER	PE POLYETHYLENE	PVC POLYVINYL CHLORIDE
<ul style="list-style-type: none"> It is the most widely used material for packaging adhesive tapes due to its flexibility and low cost Elastic and moisture resistant Can be mono-oriented (MOPP), bi-oriented (BOPP), tensioned (TPP) or reinforced with fibre glass filaments as required 	<ul style="list-style-type: none"> Generally resistant to abrasion, extreme temperatures (up to 200°C), water, chemicals. Multiple uses in different sectors from packaging to automotive Resistance to relatively high temperatures makes it a cheaper alternative to specialised masking tapes at high temperatures 	<ul style="list-style-type: none"> Also known as microphone tapes because of the pores in the backing material Based on cardboard, crepe paper or other types of paper Environmentally friendly and have good insulating power, heat resistance and tightness Use of flexible and thin paper makes paper-based tapes easy to use 	<ul style="list-style-type: none"> Generally resistant to abrasion, extreme temperatures and water Multiple uses in different sectors PE-based both Duct tape (waterproof and often used for gardening, plumbing and repairs) and Freezer tape (semi-finished in the manufacture of freezers) 	<ul style="list-style-type: none"> Resistant to UV rays and humidity Insulating and fire retardant properties Used in the production of electronic components, automotive and other industrial uses Initially used for packaging, it has been replaced by PP and PET; it is still used by movers as it leaves no glue residue

RESINS/TECHNOLOGY

ACRYLIC	HOT MELT	SOLVENT
<ul style="list-style-type: none"> Adhesive composed of acrylic polymers Versatile and high-performing in terms of resistance, durability, impermeability Takes longer to produce but ensures longevity of the product Used in packaging, insulation, automotive, electronics, etc. 	<ul style="list-style-type: none"> Fast growing technology thanks to production speed, versatility, lower cost and reduced environmental impact Based on thermoplastic polymers that are melted, spread and solidified to create the adhesive layer 	<ul style="list-style-type: none"> Solvent-based adhesives are also called oil-based or alkyd The adhesive is created using solvents which evaporate during production making it the most polluting technology Many elastomers and tackifiers are in common with Hot Melt and water based technologies

Positioning with respect to competitors

COMPANY	CUSTOMISED TAPES	ACRYLIC TAPES	HOT MELT TAPES	RECYCLED PET	SECURITY TAPES	FREEZER TAPES	DUCT TAPES	STRAPPING	SIDE TAPES	LOOP TAPES	SOLVENT TAPES
	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	✓	✓	✓					✓			✓
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Magis is active in the ESG sphere and well positioned to benefit from the industry shift towards sustainable solutions



SUSTAINABLE ADHESIVE TAPES

ecoHIT19

Eco-friendly, high-performance adhesive tape protected by a **European patent**

- Made from recycled plastic bottles: the film is produced with **at least 85% recycled granule content**
- BOPET adhesive tape with Hot Melt glue, neutral or customised with sandwich printing
- Increased strength with lower thickness, high adhesion to cardboard

KH80 100% RECYCLING KRAFT TAPE

Adhesive tape with **100% recycled paper** backing

- With Hot Melt glue, available in neutral or customised
- **2 active patents:**
 - "Process for the production of reinforced paper adhesive tape".
 - "Material for the production of reinforced paper adhesive tape".

PLASTIC TAX AS AN OPPORTUNITY

Magis is already well positioned for the industry trend towards sustainability with **2 sustainable products not subject to plastic tax** that could **replace traditional belts** with non-recycled plastic components when the latter comes into force



ORIENTATION TOWARDS ENVIRONMENTAL SUSTAINABILITY



- **Photovoltaic plant** being upgraded



- **Certification:** Gender Equality



- **Certification:** 45001



- Numerous **recycled/recyclable products**

- **Certifications:** A.I.A. authorisation, Environmental Policy, FSC Certification, Environmental Certification 14001



S

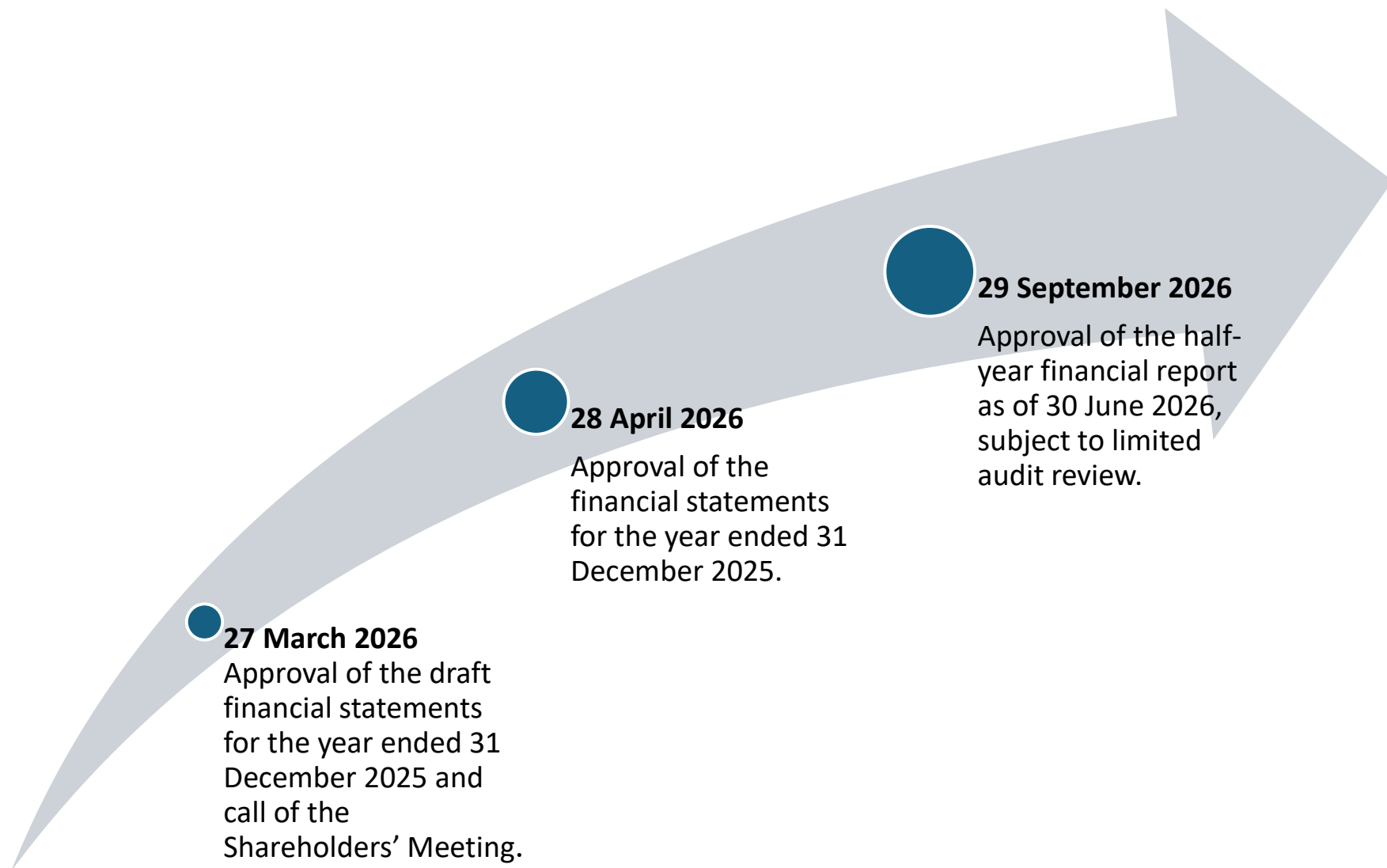
- Magis has a **Code of Ethics**, a **Social Responsibility Policy** and puts the safety and well-being of its employees first
- Strong ties with the territory through **philanthropic initiatives** towards hospitals and charitable foundations, **sponsorship** of local sports clubs and initiatives.

G

- Magis adopts Organisational Model 231 and an ESG policy based on predefined objectives



Financial Calendar 2026



27 March 2026
Approval of the draft financial statements for the year ended 31 December 2025 and call of the Shareholders' Meeting.

28 April 2026
Approval of the financial statements for the year ended 31 December 2025.

29 September 2026
Approval of the half-year financial report as of 30 June 2026, subject to limited audit review.





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