

Metriks AI

Autumn Investor Conference

L'orchestratore dell'AI agentica per PMI e professionisti



La piattaforma

Metriks Suite porta l'AI sui dati delle PMI, con i nostri specialisti

◆ Metriks DMS

◆ Company Radar

◆ AI Agent



L'orchestration layer
che trasforma dati in
decisioni

◆ Business Intelligence

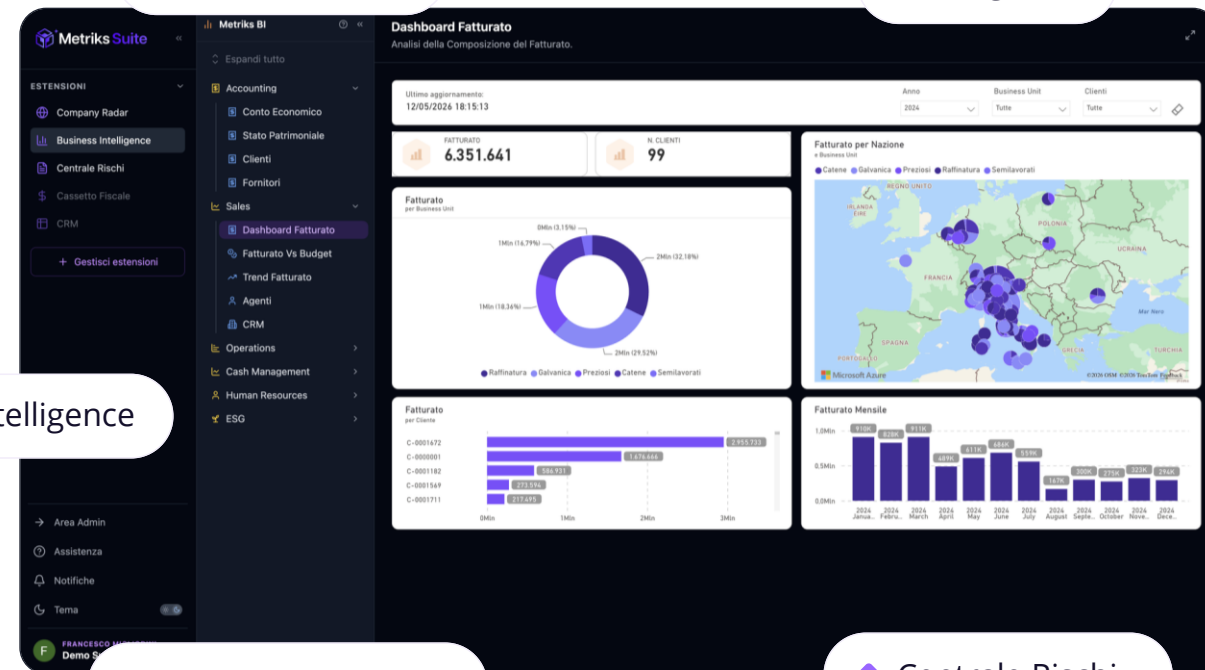
◆ Metriks Knowledge

◆ Centrale Rischi

◆ Cassetto Fiscale



[Guarda il video di presentazione](#)



Metriks at a glance

Metriks orchestra tecnologie e competenze attorno ai processi del cliente

2022

INIZIO OPERATIVITÀ

EGM

QUOTATA DA MAGGIO 2025

6

OPERAZIONI DI M&A

106

PERSONE · CA. 50% SOCI

6

SEDI IN ITALIA

01

AGENTIC AI

Agenti AI specializzati lavorano sui dati del cliente, individuano anomalie e propongono azioni.

Il software esegue; l'agente interpreta.

02

ONE-STOP-SHOP

Dati, tecnologie e competenze specialistiche convergono in un unico ecosistema, riducendo la frammentazione dell'offerta.

Meno fornitori da coordinare.

03

HUMAN IN THE LOOP

L'AI accelera analisi ed execution; le decisioni restano al management, con i nostri specialisti.

L'agente propone, la persona decide.

CHE COSA CI DISTINGUE DAGLI OPERATORI TRADIZIONALI

Software house

Vende licenze e progetti
Non entra nel merito del dato

Società di consulenza

Apporta competenze
senza una piattaforma che
renda replicabile il valore

System integrator

Collega sistemi di terzi
Non presidia dato né funzione
aziendale

Metriks AI

Software, agenti e persone
sullo stesso dato del cliente



Metriks Suite

L'orchestration layer di Metriks Suite collega i sistemi del cliente e porta AI e automazioni sullo stesso dato

1 · I SISTEMI DEL CLIENTE

Gestionali ed ERP

Fatture e fisco

Banche e rischio

CRM e vendite

Documenti

Dati di mercato

700+ app

2 · METRIKS SUITE, L'ORCHESTRATION LAYER



Metriks Suite

Identità e permessi

Ogni persona e ogni agente vede solo i dati che gli spettano

Knowledge graph

Collega fonti diverse in un unico dato, con definizione e provenienza

Gateway AI

Unico accesso ai modelli AI, con regole d'uso e controlli

Motore automazioni

Esegue le azioni approvate, con conferma e tracciabilità

Un ambiente isolato per ogni organizzazione

3 · COSA OTTIENE IL CLIENTE

Analisi

Risposte sui dati dell'azienda.

Automazioni

Scrivono, creano e notificano sui sistemi del cliente.

Ritorno: le automazioni scrivono sulla Suite e sui sistemi di origine

«Integrando tutti i dati in un'unica piattaforma intuitiva, disponiamo ora di una panoramica chiara, completa e in tempo reale.» **Sergio Mazzucca, CEO di Scintille, cliente Metriks¹**



Il divario di adozione nelle PMI

Le PMI adottano l'AI molto meno delle grandi imprese: Metriks risponde ai tre ostacoli, competenze, dati e costi

IMPRESE CON PROGETTI AI AVVIATI, 2025 ¹		OSTACOLO PER LE PMI ²	RISPOSTA DI METRIKS	EVIDENZA DAI NOSTRI DATI
7%	delle piccole imprese (1-49 addetti)	58,6% Mancanza di competenze	Specialisti e agenti AI sul processo del cliente	106 professionisti (circa il 50% soci) dislocati in 6 sedi a livello nazionale
15%	medie imprese (50-249 addetti)	45,2% Dati assenti o di scarsa qualità	Un unico dato, integrato nella Suite	ERP, CRM e altre soluzioni del portafoglio dove il dato manca, tutte integrabili
71%	grandi imprese (250+ addetti)	43,0% Costi elevati	Moduli in abbonamento, senza progetti su misura	Canone medio di €500-600 al mese per cliente
80%	delle PMI è aggredibile nel breve periodo con le nostre soluzioni			

¹ Fonte: Osservatorio AI, Politecnico di Milano (2025). ² Fonte: ISTAT, «Imprese e ICT 2025»: ostacoli citati da chi ha valutato l'AI senza adottarla; strumenti digitali in uso.

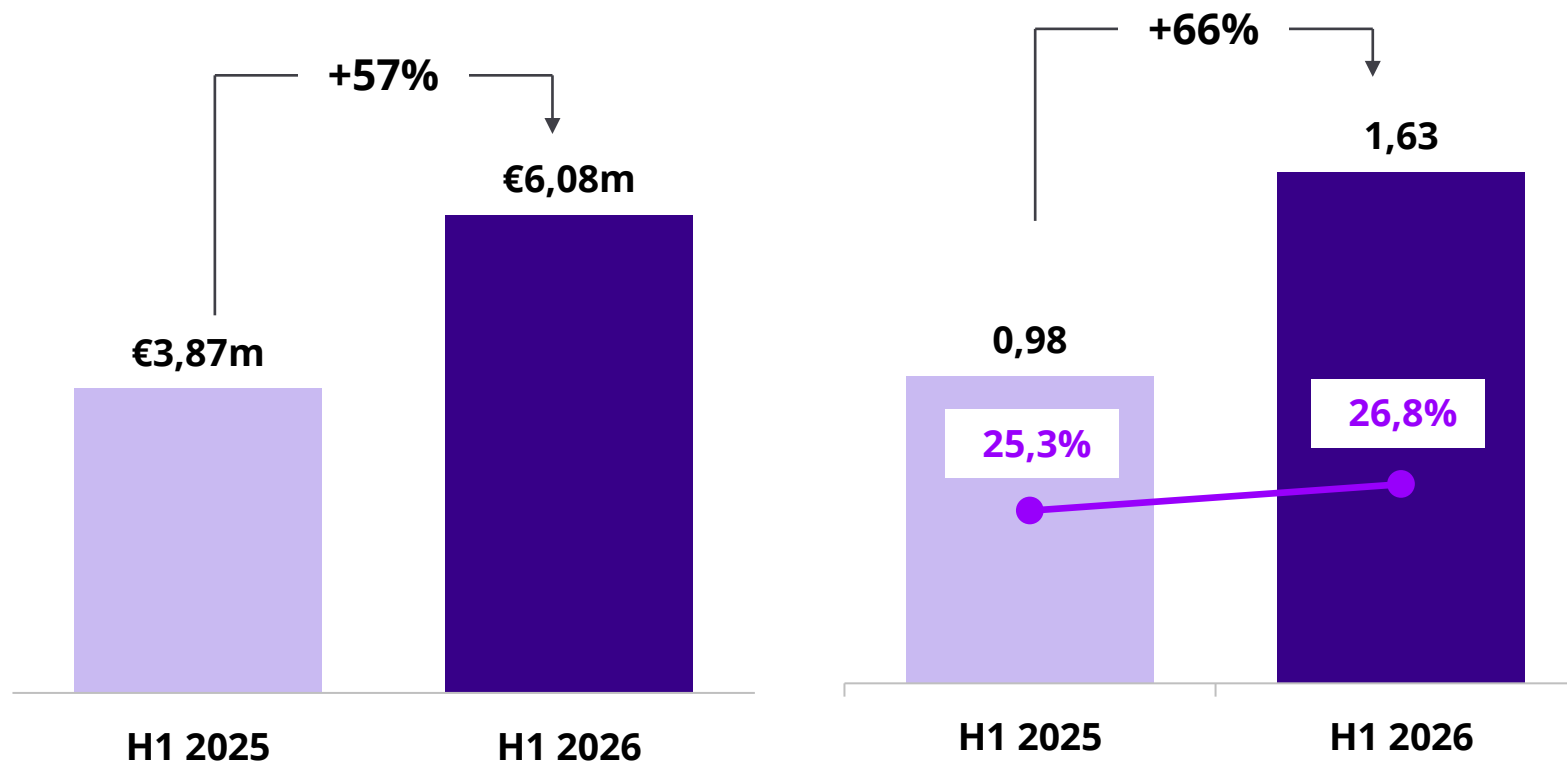
Risultati del primo semestre 2026

Le acquisizioni hanno aggiunto scala senza diluire la redditività, e il Gruppo chiude il semestre con cassa netta positiva

1 · RISULTATI H1 2026 VS H1 2025¹

VALORE DELLA PRODUZIONE, €M

EBITDA €M e Margine EBITDA %



2 · INDICATORI CHIAVE¹

€2,35m

ricavi ricorrenti, +52,5% su H1 2025

ca. **1.700**

clienti, +143% rispetto a giugno 2025

€1,02m

cassa netta al 30.06.2026, +€0,86m nel semestre vs FY2025

¹ Fonte: Relazione Semestrale Consolidata del Gruppo Metriks al 30.06.2026.



Strategia di M&A

La crescita inorganica porta clienti, tecnologie e competenze con prezzo disciplinato e soci venditori incentivati

1 - COSA COMPRIAMO

CUSTOMER BASE

Società che portano nuovi clienti PMI in Italia e, in modo mirato, all'estero

Polo Informatico · **Fanizza** · **Systema**
Teuron · **Workgroup**

METRIKS SUITE

dati del cliente, agenti AI e specialisti su un'unica piattaforma

CAPACITÀ

Prodotti proprietari e tecnologie che aggiungono funzionalità alla Suite
Logica Services as a Software, con revenue model ARR

FCONN · dati dagli impianti
Appare · sviluppo di agenti AI
TradeLab · dati di mercato e consulenza

2 - COME FACCIAMO M&A

Disciplina

sul prezzo e sulla scelta dei target

Soci incentivati

meccanismi incentivanti sui soci venditori

Prezzo in azioni

parte del corrispettivo pagata in azioni Metriks

Integrazione

tecnologie e competenze entrano nella Suite senza duplicare la delivery

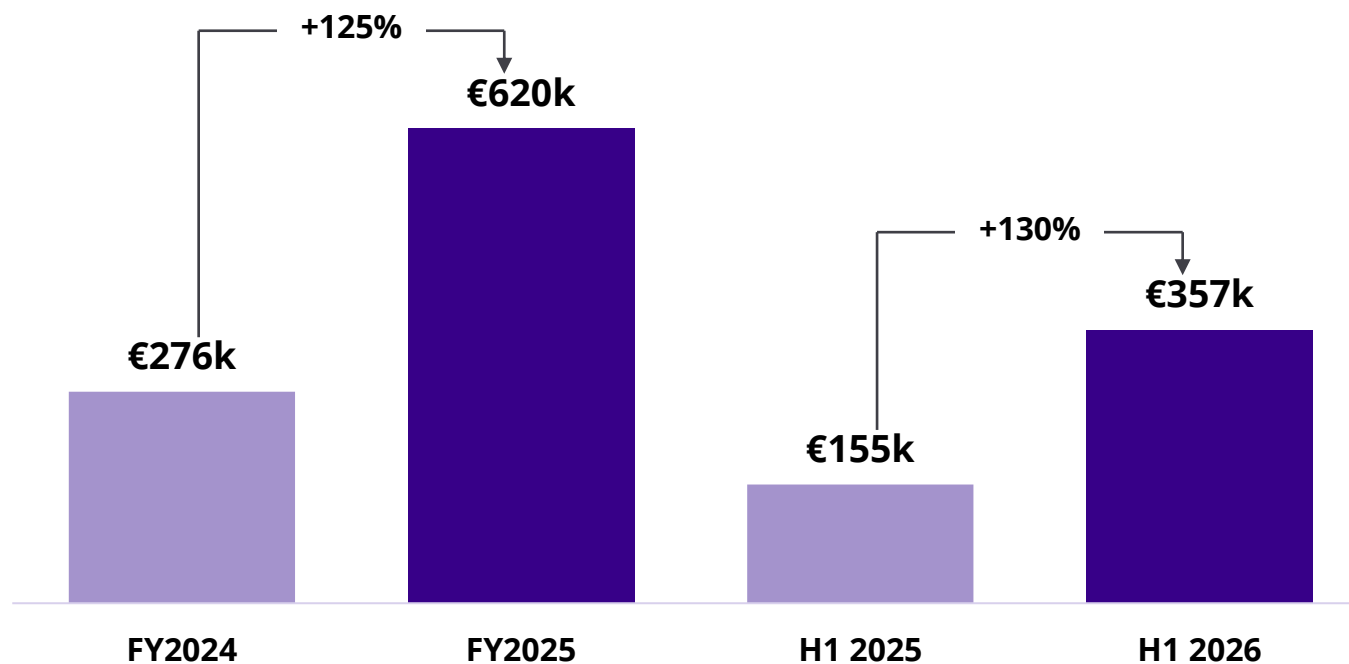


Il caso Polo Informatico

A 19 mesi dal closing l'EBITDA è più che raddoppiato e l'indebitamento si è ridotto di due terzi: il margine cresce per struttura, non per tagli

EBITDA di Polo Informatico, € migliaia¹

Stand-alone, per esercizio e per semestre



19 MESI DAL CLOSING · FEBBRAIO 2025²

MARGINE EBITDA

FY2024 → H1 2026

8,4% → 18,5%

INDEBITAMENTO / EBITDA³

FY2024 → H1 2026

5,9x → 0,7x

VALORE DELLA PRODUZIONE

H1 2026 vs H1 2025

+15,3%

¹ Nota: Polo Informatico S.r.l., dati stand-alone al lordo delle elisioni; FY2024 è l'ultimo esercizio pieno prima dell'acquisizione. ² Nota: Closing del 60% a febbraio 2025. ³ Nota: Calcolato sui semestri su EBITDA annualizzato.



Workgroup e TradeLab

Le operazioni annunciate a luglio rafforzano il ruolo di Metriks come orchestratore nel retail, integrando software e market intelligence

WORKGROUP S.r.l.

Term sheet sottoscritto · 29 lug 2026 · acquisizione del 100%

Corrispettivo: cash, azioni Metriks a €4,50 e obbligazioni convertibili⁴



TRADELAB S.p.A.

OPS totalitaria · 29 lug 2026 · 0,667 azioni Metriks per azione



KEY FIGURES FY2026 · BUDGET¹

€5,9m

VALORE PRODUZIONE

€2,9m

EBITDA

49,5%

MARGINE EBITDA

KEY FIGURES FY2026E²

€8,0m

VALORE PRODUZIONE

€1,2m

EBITDA

15,0%

MARGINE EBITDA

RAZIONALE DELL'OPERAZIONE

- **Canale:** 1.200+ clienti retail per cross-selling e up-selling
- **Dati:** il software di punto vendita alimenta gli agenti AI
- **Redditività:** EBITDA 49,5% a budget

RAZIONALE DELL'OPERAZIONE

- **Dati e Settori:** 25+ anni su Retail, Away From Home, Pharma e PA
- **Piattaforme SaaS:** ricavi €1,56m nel 2025, +46%³
- **PMI:** Obiettivo Europa e MarkerWeb portano il SaaS alle PMI

¹Fonte: Budget Workgroup S.r.l. FY2026. ²Fonte: Stime KT&Partners, 1° aprile 2026, su TradeLab S.p.A. ³Fonte: Ricavi Platform TradeLab S.p.A.: comunicato TradeLab del 27 marzo 2026.

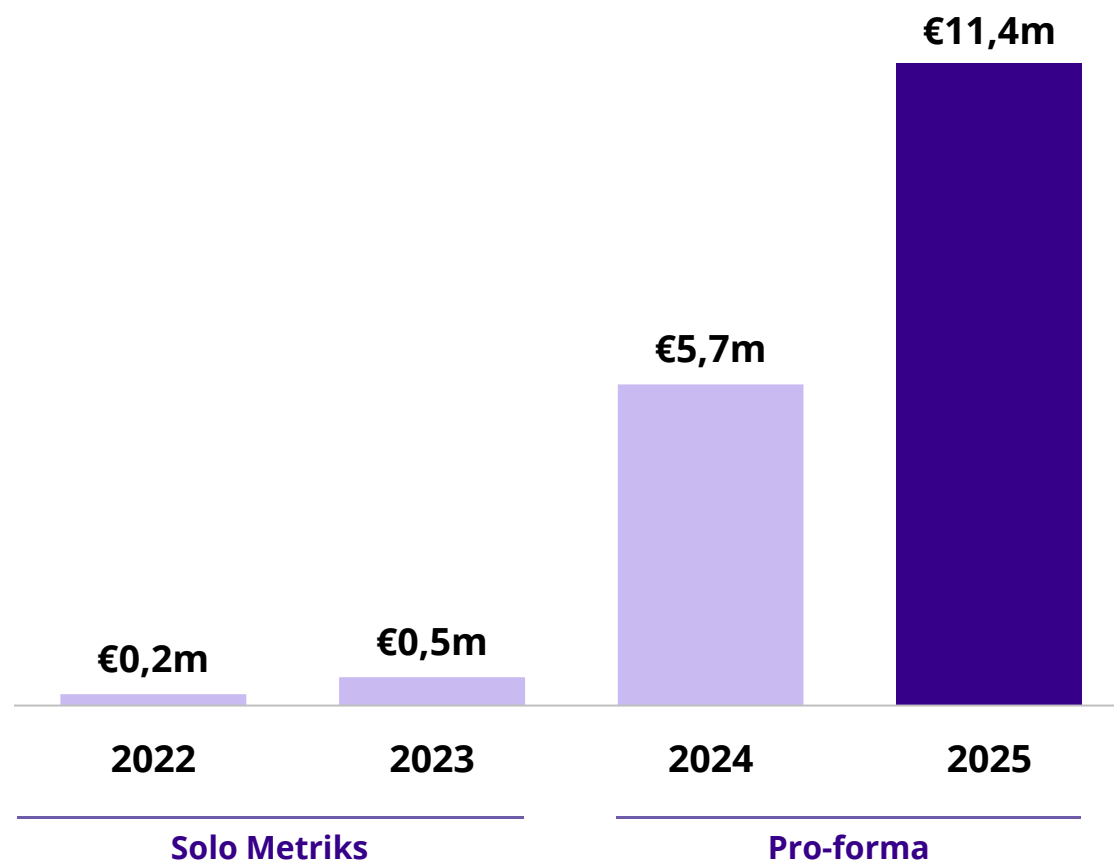
⁴Fonte: Term sheet Metriks, Mare Group e WGS del 29 luglio 2026: 100% di Workgroup pagato in cash, azioni Metriks a €4,50 e obbligazioni convertibili in azioni Metriks (scadenza 30 giugno 2028).



What's next

La crescita continua oltre il 2025, con una strategia organica e inorganica

Valore della produzione, €m



LA STRATEGIA DI METRIKS

**Crescita organica**

Cross-selling e up-selling delle soluzioni del Gruppo ai clienti

**Crescita inorganica**

Con disciplina; soci venditori incentivati, parte del prezzo in azioni

TRE PRIORITÀ

01**Base clienti PMI**

Clienti ricorrenti a cui vendere le soluzioni del Gruppo

02**Geografie**

Più territori in Italia, all'estero inserimenti mirati

03**Tecnologie e competenze**

Entrano nell'offerta senza duplicare la delivery



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