

UNITED STATES
SECURITIES AND EXCHANGE COMMISSION
Washington, D.C. 20549

FORM 8-K

CURRENT REPORT

Pursuant to Section 13 or 15(d) of the Securities Exchange Act of 1934

Date of Report (Date of earliest event reported): October 6, 2026



Navitas Semiconductor Corporation

(Exact name of registrant as specified in its charter)

Delaware

(State or other jurisdiction
of incorporation)

001-39755

(Commission File Number)

85-2560226

(IRS Employer Identification No.)

3520 Challenger Street, Torrance, California

(Address of principal executive offices)

90503-1640

(Zip Code)

Registrant's telephone number, including area code: (844) 654-2642

Check the appropriate box below if the Form 8-K filing is intended to simultaneously satisfy the filing obligations of the registrant under any of the following provisions:

- ☐ Written communications pursuant to Rule 425 under the Securities Act (17 CFR 230.425)
- ☐ Soliciting material pursuant to Rule 14a-12 under the Exchange Act (17 CFR 240.14a-12)
- ☐ Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act (17 CFR 240.14d-2(b))
- ☐ Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act (17 CFR 240.13e-4(c))

Securities registered pursuant to Section 12(b) of the Act:

Title of each class	Trading Symbol(s)	Name of each exchange on which registered
Class A Common Stock, par value \$0.0001 per share	NVTS	The Nasdaq Stock Market LLC

Indicate by check mark whether the registrant is an emerging growth company as defined in Rule 405 of the Securities Act of 1933 (§ 230.405 of this chapter) or Rule 12b-2 of the Securities Exchange Act of 1934 (§ 240.12b-2 of this chapter).

Emerging growth company ☐

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act. ☐

Item 7.01. Regulation FD Disclosure.

On October 6, 2026, Navitas Semiconductor Corporation (the “Company”) issued a press release announcing the closing of the transactions contemplated by the Merger Agreement (as defined below). A copy of the press release is attached hereto as Exhibit 99.1 and is incorporated herein by reference. Also on October 6, 2026, the Company published a CEO letter providing an update to investors with respect to the Company’s Navitas 2.0 transformation. A copy of the CEO letter is furnished as Exhibit 99.2 and is incorporated into this Item 7.01 by reference. The CEO letter is posted on the Company’s Investor Relations website at <https://ir.navitassemi.com>, LinkedIn page and X page, along with “reposts” by Chris Allexandre, the Company’s President and Chief Executive Officer, on each of LinkedIn and X. The content of the foregoing websites is not incorporated by reference into this Current Report on Form 8-K.

The information furnished pursuant to Item 7.01 of this Current Report on Form 8-K shall not be deemed “filed” for purposes of Section 18 of the Exchange Act of 1934, as amended (the “Exchange Act”), or otherwise subject to the liabilities of that section, nor shall it be deemed incorporated by reference into any other filing of the Company under the Securities Act of 1933, as amended (the “Securities Act”) or the Exchange Act, except as expressly set forth by specific reference in such a filing.

Item 8.01. Other Events.

On October 6, 2026 (the “Closing Date”), the Company and Claros, Inc., a Delaware corporation (“Claros”), closed the transactions contemplated by the previously announced Agreement and Plan of Merger (the “Merger Agreement”), by and among the Company, Claros Compass Merger Sub 1 Inc., a Delaware corporation and a wholly-owned subsidiary of the Company (“Merger Sub 1”), Compass Merger Sub 2 LLC, a Delaware limited liability company and a wholly-owned subsidiary of the Company (“Merger Sub 2”), and Shareholder Representative Services LLC, a Colorado limited liability company, solely in its capacity as the representative, agent and attorney-in-fact of the securityholders of Claros.

Item 9.01. Financial Statements and Exhibits.

(d) Exhibits.

<u>Exhibit</u> <u>No.</u>	<u>Description</u>
<u>99.1</u>	<u>Press release, dated October 6, 2026.</u>
<u>99.2</u>	<u>CEO letter, dated October 6, 2026.</u>
<u>99.3*</u>	<u>Agreement and Plan of Merger, dated August 24, 2026, by and among Navitas Semiconductor Corporation, Claros, Inc., Compass Merger Sub 1 Inc., Compass Merger Sub 2 LLC, and Shareholder Representative Services LLC (incorporated by reference to Exhibit 2.1 of our current report on Form 8-K, filed with the SEC on August 25, 2026).</u>
104	Cover Page Interactive Data File (embedded within the Inline XBRL document).
*	The exhibits and schedules have been omitted pursuant to Item 601(a)(5) of Regulation S-K under the Securities Act. The Company agrees to furnish supplementally a copy of all omitted exhibits and schedules to the SEC upon request; provided, that the Company may request confidential treatment for any exhibits or schedules so furnished.

SIGNATURES

Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned hereunto duly authorized.

NAVITAS SEMICONDUCTOR CORPORATION

Dated: October 6, 2026

By: /s/ Chris Allexandre

Chris Allexandre

President and Chief Executive Officer



Navitas Closes Acquisition of Claros, Advancing AI Infrastructure with Grid-to-xPU Power Delivery

Completes Navitas' high-power portfolio with Claros' IVR technology, enabling vertical and embedded architectures and providing last step in power delivery to the core

Navitas to host webinar 'Breaking the AI Infrastructure Power Wall: From Grid-to-xPU', unveiling Claros' technology and differentiation on October 20, 2026

TORRANCE, CA — Oct. 6, 2026 — Navitas Semiconductor (Nasdaq: NVTX) (Navitas or “the Company”), a leader in next-generation power semiconductors and power delivery solutions, pioneering GaN, high-voltage and ultra-high-voltage SiC, and IVR technologies, today announced the closing of its previously announced acquisition of Claros, Inc. (Claros), a power management solutions company developing integrated voltage regulator (IVR) technology for next-generation AI data centers, providing the last step to powering the xPU.

The completed transaction extends Navitas' AI infrastructure portfolio from the grid to the xPU, bringing industry-leading IVR capabilities. Claros™ IVR integrates power transistors, digital control, inductors and capacitors into a single IVR technology stack to enable next-generation Vertical Power Delivery (VPD) and Embedded Power Delivery (EPD) architectures. Its Packaged Integrated Voltage Regulator (pIVR) and Embedded Integrated Voltage Regulator (eIVR) products, based off the same Claros IVR technology stack, move power conversion closer to the xPU and deliver higher efficiency, faster transient response and greater power density, while the modular PowerArray™ architecture scales power delivery to meet the rapidly increasing demands of next-generation processors at the center of modern AI systems.

Combined with Navitas' GaN and high-voltage and ultra-high-voltage SiC technologies that enable the new 800V DC architecture, the Company is “breaking the AI infrastructure power wall” by addressing the efficiency, power density and performance bottlenecks emerging as AI data centers and xPUs demand dramatically more power.

“Closing this acquisition is a defining step in the Navitas 2.0 transformation and our strategy to power AI infrastructure from grid-to-xPU,” said Chris Allexandre, President and CEO of Navitas. “With power now the bottleneck for AI, increases in power delivery and efficiency are the key enablers of more compute output. The future of AI depends on delivering thousands of amps to increasingly power-hungry processors with unprecedented speed and precision, in addition to re-defining the racks with higher power centralized systems and higher density architectures. This ‘power wall’ has restricted next-generation xPUs in megawatt-scale server racks from achieving the next wave of AI performance. Navitas 2.0 brings together GaN, high-voltage and ultra-high-voltage SiC, and now IVR technologies to break the power wall and address power conversion across the complete grid-to-xPU architecture.

“Additionally, this combination doubles our serviceable addressable market (SAM), deepens our engagement with hyperscalers and AI power platform providers, and strengthens our capabilities and leadership in power delivery for AI infrastructure. As AI power demand accelerates, we are uniquely positioned to deliver greater value for our customers, while driving sustainable long-term growth.”

Navitas expects the acquisition to more than double the Company's identified 2030 SAM to over \$8 billion, adding at least \$3.5 billion from the rapidly growing VPD and IVR markets. Combined with Navitas' existing \$3.5 billion SAM for GaN and HV/UHV SiC and approximately \$1 billion from new JFET technology, the transaction significantly expands Navitas' opportunity across the complete grid-to-xPU power chain.



Webinar Presentation | Breaking the AI Infrastructure Power Wall: From Grid-to-xPU

Speakers: Chris Allexandre - Navitas President and CEO
Llew Vaughan-Edmunds - Navitas Chief Marketing Officer
Dan Kultran - VP & GM, IVR Business Unit, former CEO & Claros Co-founder

When: **Tuesday, October 20**
Time: **8:00 a.m. Pacific Time** (11:00 a.m. Eastern Time)
Webcast: [Click Here](#)

Additionally, an archived version of the video webinar as well as supporting presentation materials will be accessible on the Investor Relations section of the Company's website at ir.navitassemi.com.

About Navitas

Navitas Semiconductor (Nasdaq: NVTX) is a leader in next-generation power semiconductors and power delivery solutions, pioneering GaN, high-voltage and ultra-high-voltage SiC, and IVR technologies for AI infrastructure, including data centers and energy and grid systems, as well as additional markets such as high-performance computing and industrial electrification. Collectively, these technologies address the complete grid-to-xPU power architecture, breaking the AI infrastructure power wall and enabling higher efficiency, greater power density, and increased performance across the entire power chain. Navitas' GaNFast™ FETs deliver industry-leading power density, efficiency, and high-speed performance, while GaNFast™ power ICs integrate GaN power, drive, control, sensing, and protection to enable faster, more efficient power conversion, leading to smaller and more reliable systems. The GeneSiC™ portfolio combines proprietary trench-assisted planar (TAP) SiC technology with leading-edge discrete packaging and SiCPAK™ power modules to deliver industry-leading efficiency, ruggedness and performance. Claros™ IVR technologies extend power delivery directly to the xPU, enabling customers to implement vertical power delivery (VPD) and embedded power delivery (EPD) architectures with high-density power conversion beneath or within millimeters of the processor, minimizing power-delivery losses and impedance while enabling ultra-fast transient response, higher efficiency and maximum power density. Navitas has over 450 patents issued or pending and is a leader in 800 VDC and the advanced AI power infrastructure ecosystem.

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Forward-Looking Statements

Any forward-looking statements contained in this release are included pursuant to the "safe harbor" provisions of the Private Securities Litigation Reform Act of 1995 and other federal securities laws. These forward-looking statements are intended to provide management's current expectations or plans for the Company's future operating and financial performance, based on assumptions currently believed to be valid. Words such as "anticipate," "believe," "estimate," "expect," "intend," "plan," "project," "may," "will," "would," "could," "should," and similar expressions are intended to identify forward-looking statements, although not all forward-looking statements contain these words. All forward-looking statements involve risks, uncertainties and other factors that may cause actual results to differ materially from those expressed or implied in the forward-looking statements. These statements, including statements regarding the anticipated benefits, synergies and prospects of the combined company following the completed acquisition of Claros, expected contributions to Navitas' serviceable addressable market, technology roadmap, customer engagements, and financial model, are based on management's current expectations and are subject to risks and uncertainties that could cause actual results to differ materially, including, among others: the risk that the anticipated benefits, synergies and cost savings of the transaction may not be realized within the expected timeframe or at all; the difficulties and costs of integrating the two businesses; significant transaction costs and/or unknown or inestimable liabilities; the effect of the transaction on the parties' ability to retain and hire key personnel and to maintain relationships with customers, suppliers and other business partners; the diversion of management's attention and resources from ongoing business operations; the impact of macroeconomic and market conditions, including economic downturns, international conflict, trade disputes and tariffs; and the other risks identified in the Company's filings with the SEC. These forward-looking statements speak only as of the date of this release and the Company undertakes no obligation to update any forward-looking statement, except as required by applicable law.

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PR Image



A Letter from Chris Alexandre, President and CEO



Navitas 2.0: 'Breaking the AI Infrastructure Power Wall'

To Our Shareholders, Customers and Partners,

Today marks an important milestone for Navitas as we complete the acquisition of Claros and take another significant step forward in our Navitas 2.0 transformation.

AI is fundamentally reshaping the requirements for power infrastructure. As AI data centers move toward megawatt-scale racks and next-generation xPUs require thousands of amps delivered with unprecedented speed and precision, traditional power architectures are reaching their limits. We call this the AI Infrastructure Power Wall, and Navitas 2.0 is focused on breaking it.

Navitas 2.0 is focused on high-power, high-growth markets, with AI infrastructure at the center of our strategy. By combining our leadership in GaN and high-voltage and ultra-high-voltage SiC with Claros' Integrated Voltage Regulator (IVR) technology, we are building a differentiated power platform that addresses the complete Grid-to-xPU architecture, from the electrical grid and emerging 800 VDC infrastructure to the critical final stage of power delivery directly to the processor.

Claros is an important addition as rapidly increasing xPU power creates a fundamental shift in how power must be delivered. Claros' IVR technology stack integrates power, control and passives to enable next-generation Vertical Power Delivery (VPD) and Embedded Power Delivery (EPD) architectures. Packaged Integrated Voltage Regulator (pIVR) and Embedded Integrated Voltage Regulator (eIVR) products, move power conversion closer to the xPU, enabling higher efficiency, faster transient response and greater power density, while the modular PowerArray™ architecture is designed to scale with the increasing power and current requirements of next-generation AI processors.

For our customers, this expands our ability to address the AI power architecture with a complementary portfolio of GaN, HV/UHV SiC and IVR technologies. It also deepens our engagement with hyperscalers and AI power-platform providers as the industry transitions toward 800 VDC, higher-density power conversion and next-generation xPU power delivery.



For our shareholders, the acquisition significantly expands Navitas' long-term opportunity. We expect Claros to add at least \$3.5 billion to our identified 2030 serviceable available market (SAM), more than doubling our total identified SAM to over \$8 billion when combined with our existing GaN and HV/UHV SiC opportunity and new JFET technology.

This acquisition is about more than completing a transaction. It is about building the technology portfolio, customer relationships and market position to power the next era of AI infrastructure.

Navitas 2.0 brings together GaN, HV/UHV SiC and IVR technologies with a clear objective: ***'Breaking the AI Infrastructure Power Wall'*** and enabling the next generation of AI computing from Grid-to-xPU.

We are excited to welcome the Claros team to Navitas and look forward to creating value for our customers and shareholders as we build the next chapter of Navitas together.

Chris Allexandre
President and Chief Executive Officer
Navitas Semiconductor
