First Half 2026
Financial & Operating Results

Analyst & Investor Briefing

11 August 2026

ACEN

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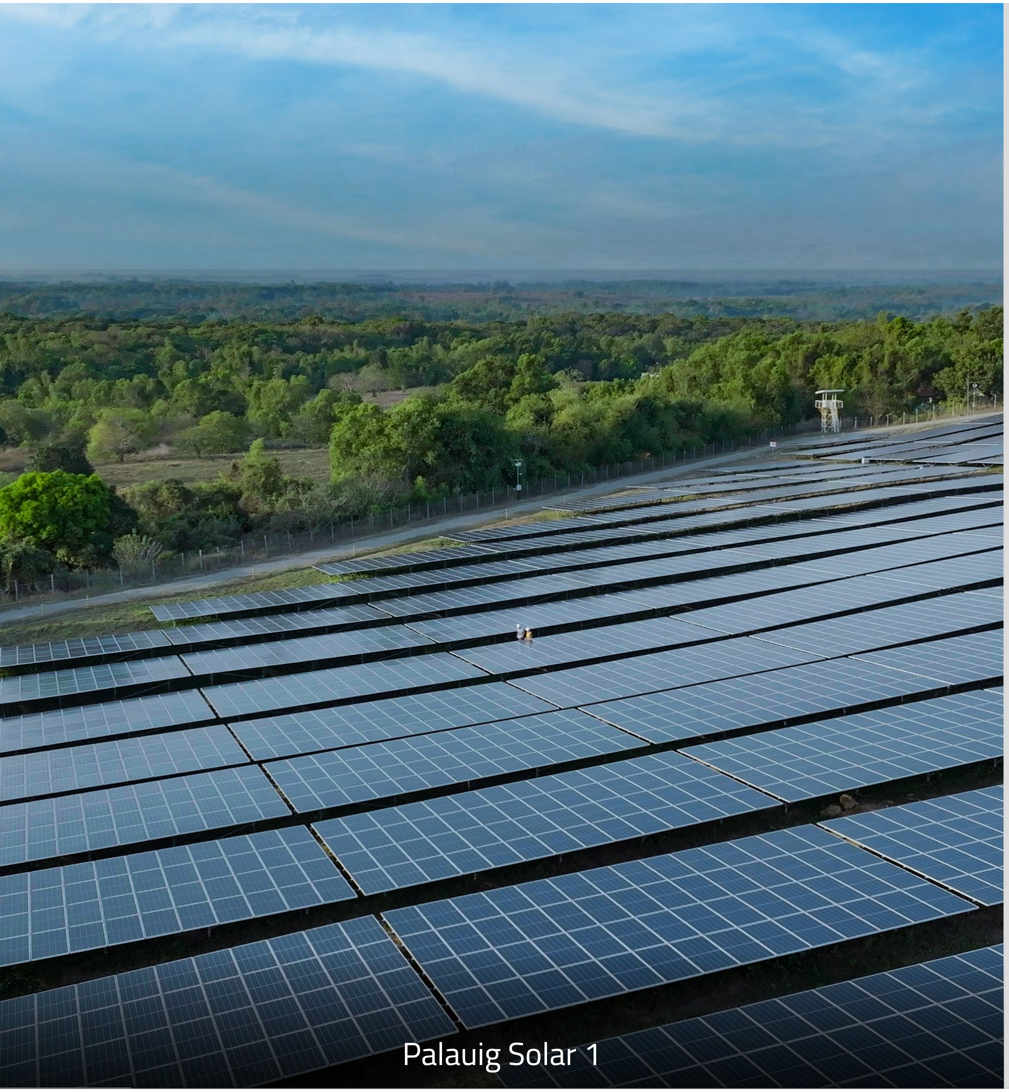
Performance Summary H1 2026



- H1 2026 vs H1 2025
  - Reported net income surged 411% vs H1 25 to ₱3.9 Bn
  - Core attributable EBITDA[1] grew 40% to ₱14.7 Bn
  - Excluding non-cash items, **NIAT increased 21% YoY to ₱4.2 Bn**
- Q2 2026 vs Q2 2025
  - Core attributable EBITDA increased 28% to ₱6.2 Bn
  - Net income, excluding non-cash items, down 17% to ₱1.3 Bn impacted by higher depreciation and net financing costs
- **Renewables output grew 21% YoY,** driven by first full half-year contributions from newly operational plants, primarily Stubbo Solar and Monsoon Wind
- **Construction continues to progress** –New England Energy Storage and Malaysia projects nearly complete; began construction of 1,660 MWh of BESS assets in the Philippines

1. Including the impact of the Meralco Change in Circumstances (CIC) price adjustment.

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Attributable Renewables Output H1 2026 +21% YoY

H1 RE generation at **4,024 GWh** driven primarily by contributions from new plants, including Stubbo Solar and Monsoon Wind

PHILIPPINE RENEWABLES

1,091 GWh

+17% YoY

Higher generation from Northern Luzon wind plants due to improved availability

INTERNATIONAL

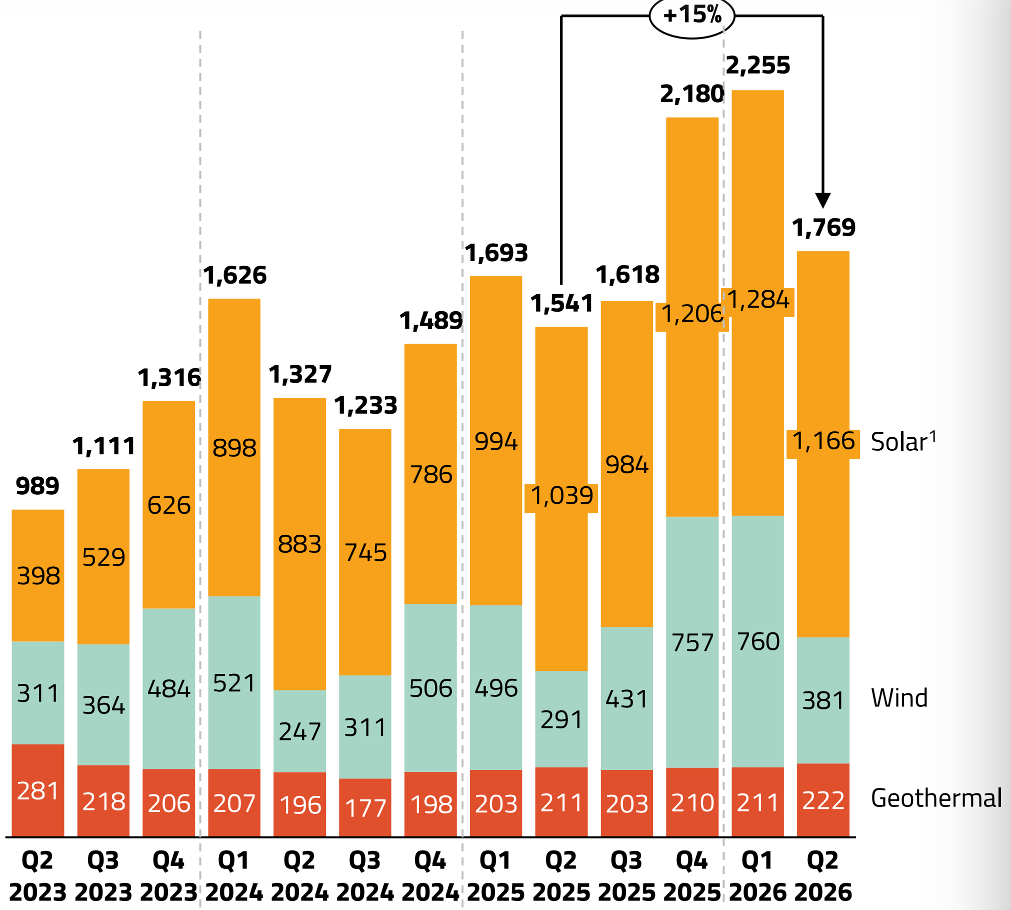
2,933 GWh

+23% YoY

Growth in output supported by first-full half year contributions from Stubbo Solar and Monsoon Wind, coupled with improved performance from Vietnam and Indonesia

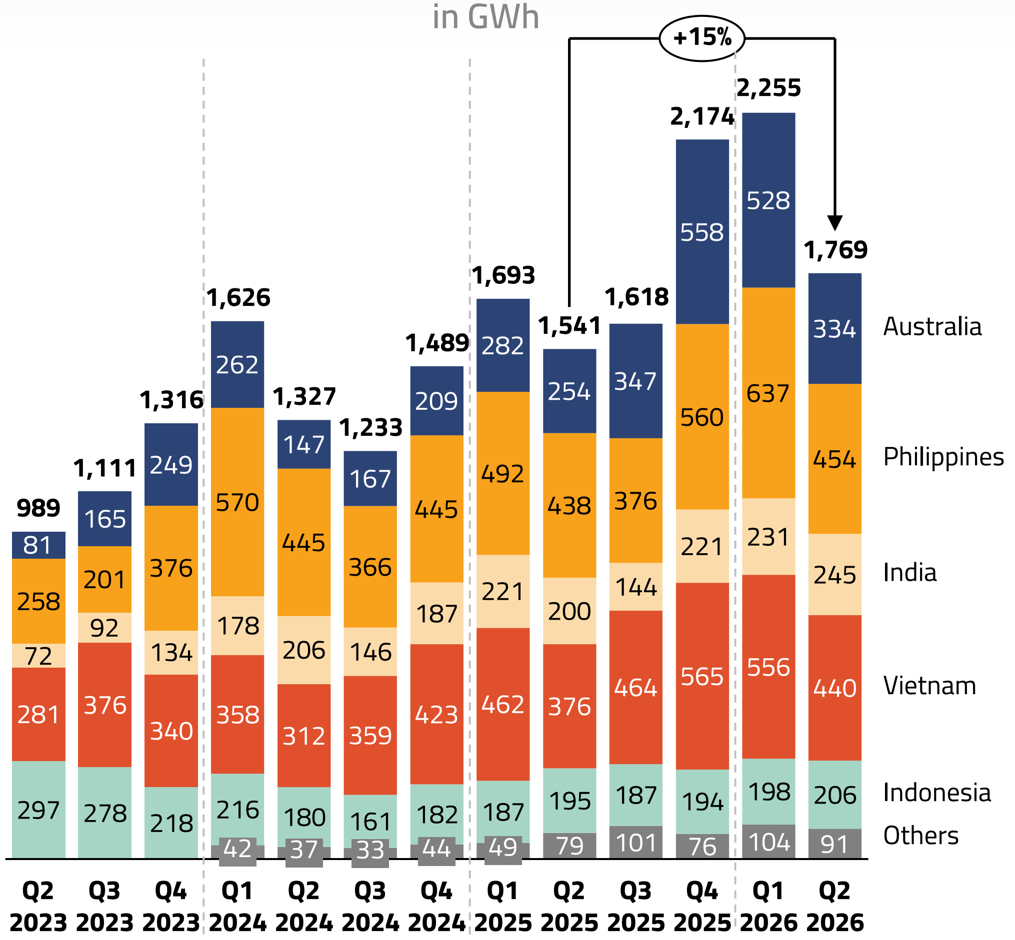
by Technology

in GWh



by Country

in GWh



1. Includes battery storage at the Alaminos Solar and New England Solar Farm site.

Core Attributable EBITDA H1 2026 +40% YoY

Profitability growth reflective of overall increase in generation and stronger market prices

	in million PHP	H1 2025	H1 2026	Change
A	**Revenue**	**15,716**	**23,125**	**+47%**
B	Cost and expenses (including non-cash items)	(17,753)	(21,629)	+22%
C	Depreciation and amortization	1,858	2,520	+36%
D	Provision for impairment	3,585	2,208	-38%
E	Equity in net income of associates and joint ventures	1,409	1,759	+25%
F	Interest income - investment in redeemable preferred shares and convertible loans[1]	1,329	1,257	-5%
G	Value realization and Other Income	235	(205)	-187%
H	Interest income - accounts and other receivables	1,504	1,029	-32%
	Statutory EBITDA	**7,883**	**10,064**	**+28%**
E	Equity in net income of associates and joint ventures	(1,409)	(1,759)	+25%
F	Interest income - investment in redeemable preferred shares and convertible loans[1]	(1,329)	(1,257)	-5%
	Attributable EBITDA from associates and joint ventures	6,854	8,693	+27%
	Attributable EBITDA	**11,999**	**15,741**	**+31%**
G	Value realization	-	-	
H	Interest income - accounts and other receivables	(1,504)	(1,029)	-32%
	Core Attributable EBITDA[2]	**10,495**	**14,712**	**+40%**
	Net income after tax att. to equity holders of the parent company	**763**	**3,901**	**+411%**
	Core net income after tax[3]	**3,494**	**4,215**	**+21%**

A: Revenue - From subsidiaries in Philippines and Australia

B: Cost and Expenses – Includes cost of sale of electricity and general & admin expenses (GAE). This also includes non-cash items – depreciation and provision for impairment.

C: Depreciation - Includes power plant depreciation under costs and expenses, and non-plant depreciation under GAE

D: Provision for impairment - Non-cash expense

E: Equity in net income of associates and joint ventures - Share in net income after tax in non-controlled investees; ownership based on common interest

F: Interest Income – investment in redeemable preferred shares and convertible loans - Coupons on investments in redeemable preferred shares and convertible loans in non-controlled investees

G: Value realization – Cash gain from sale of assets

H: Interest Income – accounts and other receivables - Earnings from project bridge financing and partner loans

1. Interest income on other financial assets at amortized cost are coupons from redeemable preferred share investments of the Group in international renewable power plants.
2. Including the impact of the Meralco Change in Circumstances (CIC) price adjustment.
3. Excluding value realization and impairments but includes the Meralco Change in Circumstances (CIC) price adjustment.

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Consolidated Income Statement H1 2026

YoY growth supported by expansion of retail business, new plant contributions, and Meralco mid-merit contracts

	in million PHP	H1 2025	H1 2026	Change
	Revenues			
	Revenue from sale of electricity	15,294	**22,512**	+47%
	Rental income	35	**36**	+3%
	Dividend income	235	**262**	+11%
	Other revenues	152	**315**	+107%
A		15,716	**23,125**	**+47%**
	Costs and Expenses			
	Cost of sale of electricity			
	Cost of purchased power	8,866	**11,779**	+33%
C	Depreciation and amortization	1,496	**2,171**	+45%
	Fuel	191	**3**	-98%
	Others	1,415	**1,363**	-4%
		11,968	**15,316**	+28%
	General and administrative expenses			
	Personnel costs, management and professional fees	1,114	**1,853**	+66%
D	Provision for impairment	3,585	**2,208**	-38%
C	Depreciation and amortization	362	**349**	-4%
	Others	724	**1,903**	+163%
		5,785	**6,313**	+9%
B	**Total Costs and Expenses**	17,753	**21,629**	+22%
E	**Equity in net Income of associates and joint ventures**	1,409	**1,759**	+25%

		H1 2025	H1 2026	Change
	Other Income (Charges)			
	Interest and other financial income			
	Cash in banks and short-term deposit	377	**270**	-28%
H	Accounts and notes receivable	1,504	**1,029**	-32%
F	Investments in redeemable preferred shares and convertible loan	1,329	**1,257**	-5%
		3,210	**2,556**	-20%
	Interest and Other Finance Charges	(2,318)	**(3,906)**	+69%
	Other Income - Net			
G	Gain (loss) on asset disposal	(90)	**-**	-100%
	Remeasurement gains	-	**1,814**	-
	Others	380	**464**	+22%
		290	**2,278**	+685%
	Income (loss) before income tax	554	**4,183**	+654%
	Provision for (benefit from) income tax	(493)	**119**	-124%
	Net income (loss)	1,047	**4,064**	+288%
	Non-controlling interests	(284)	**(163)**	-43%
	Net income after tax att. to equity holders of the parent company	**763**	**3,901**	**+411%**

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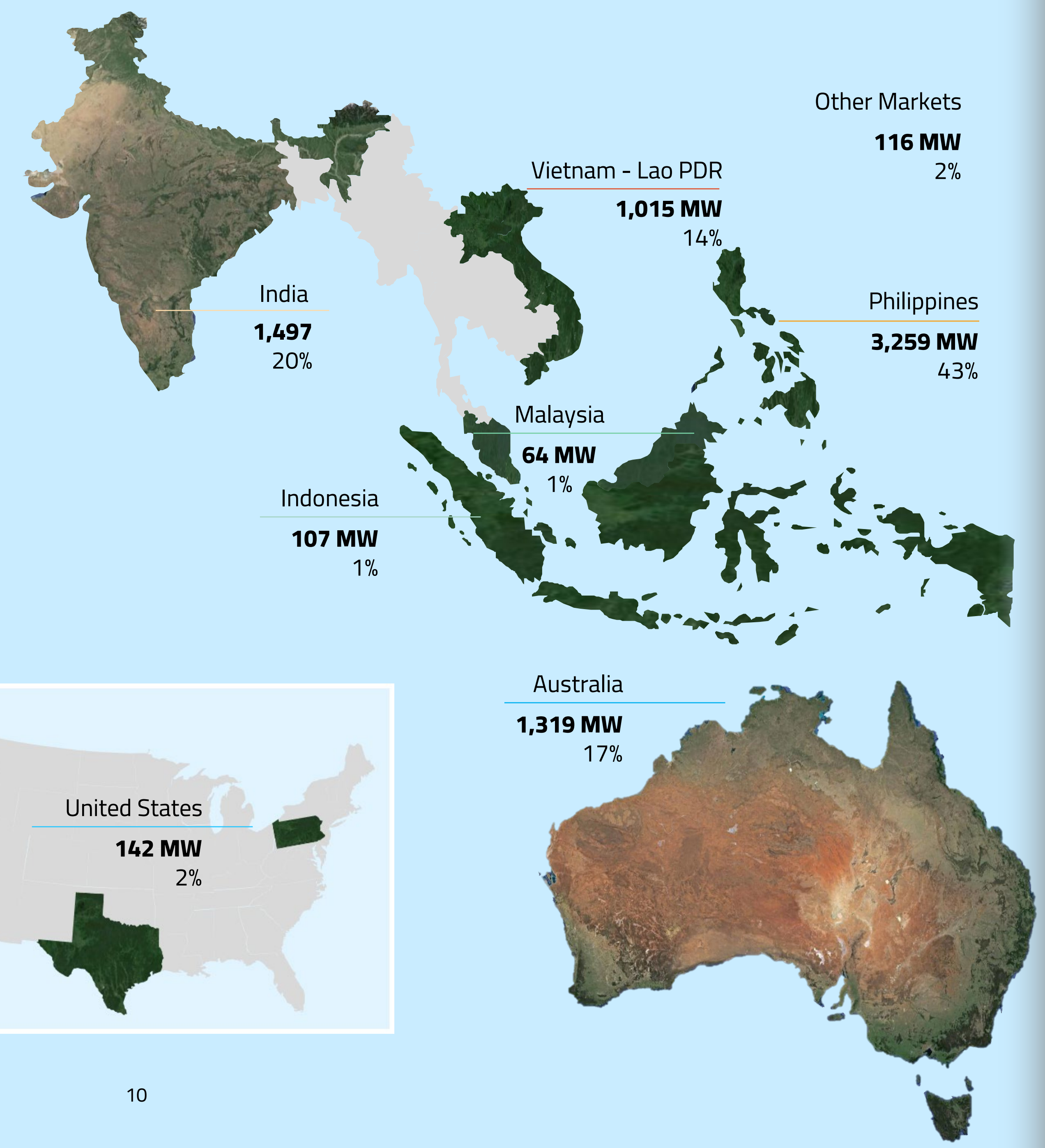
Generation Portfolio 11 August 2026

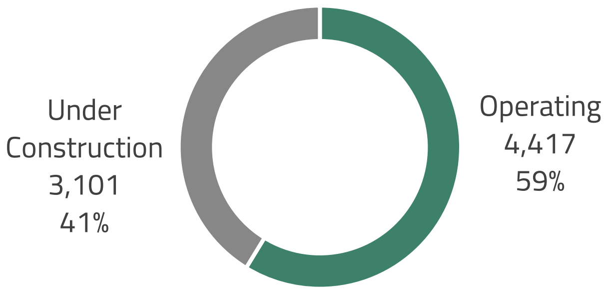


Total Attributable Renewables Capacity[1]

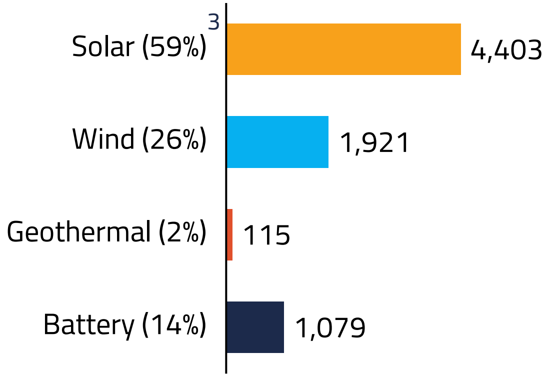
7,517 MW

Contracted Energy H1 2026

Project Status



RE Technology



1. Attributable capacity is computed as gross capacity of owned, under construction, and committed assets multiplied by ACEN's effective economic ownership.
2. Weighted based on GWh and revenues for operating plants.
3. Rooftop solar is reflected in Solar capacity.

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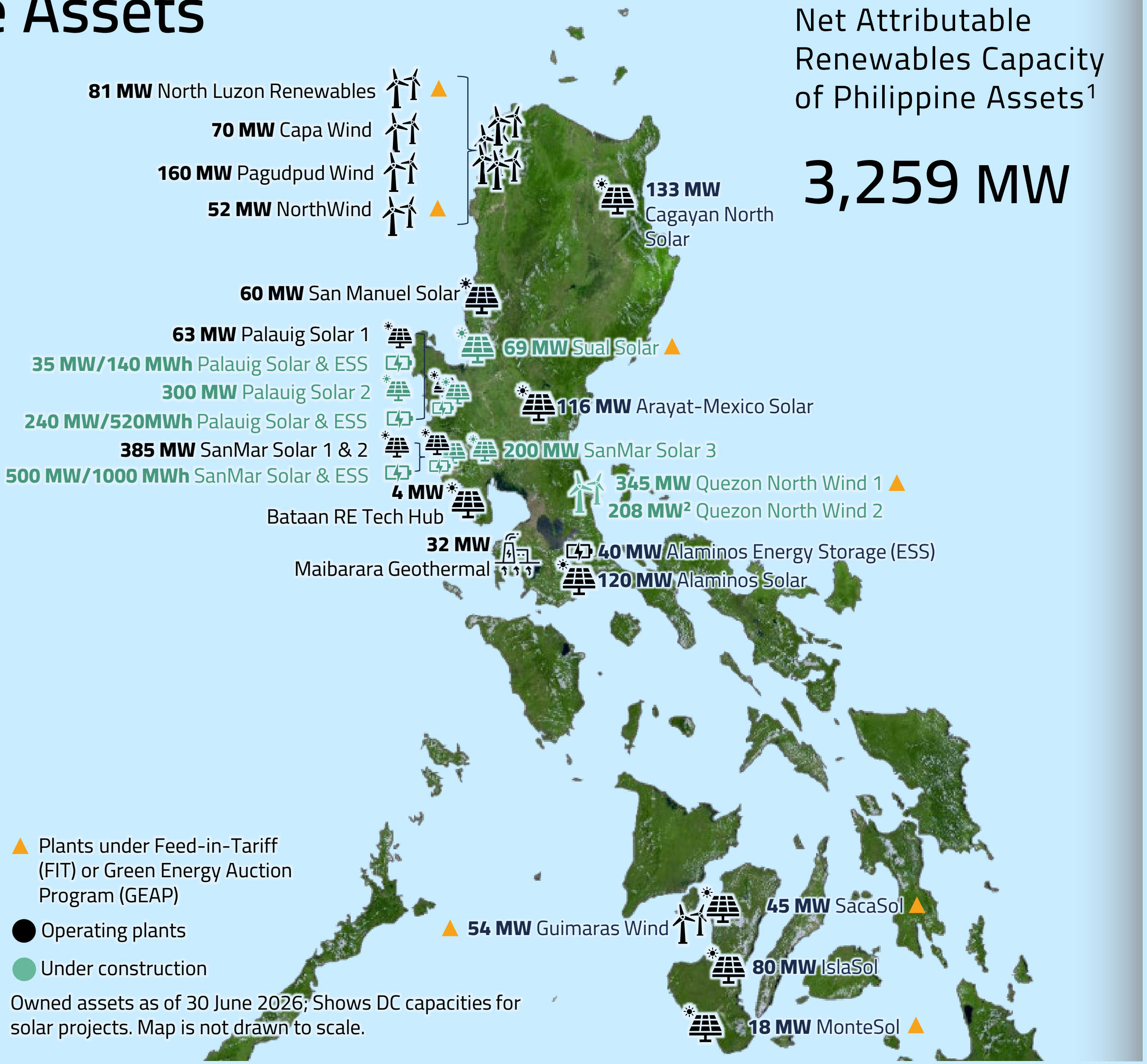
Philippine Assets

Pangasinan San Manuel Solar

Ilocos Norte Pagudpud Wind

Negros Occidental Islasol

Laguna Alaminos BESS



Plants under Feed-in-Tariff (FIT) or Green Energy Auction Program (GEAP)

Operating plants

Under construction

Owned assets as of 30 June 2026; Shows DC capacities for solar projects. Map is not drawn to scale.

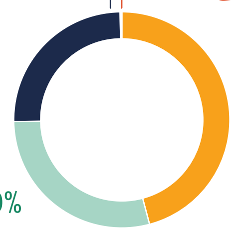
Net Attributable Renewables Capacity of Philippine Assets[1]

3,259 MW

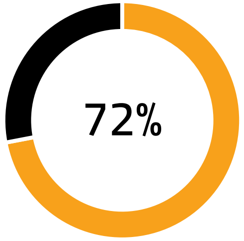
Breakdown by Net Attributable Capacity

Operating Status

Technology



Contracted Output[3]



1. Refers to gross capacity of owned assets, multiplied by ACEN's economic ownership.
2. Quezon North Wind 2 capacity subject to final configuration.
3. Weighted by GWh; Includes SLTEC supply.

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Year-on-year growth driven by stronger retail performance and full commencement of Meralco mid-merit contracts

PERFORMANCE UPDATES

- H1 2026 Financials
  - **Attributable Revenue of ₱23.6 Bn**, up 41% YoY
  - **Attributable EBITDA of ₱6.6 Bn**, up 48% YoY; **Generation EBITDA Margin[1] of ~48%**
  - **Renewable energy output[2] of 1,091 GWh**, up 17% YoY
- ACEN secures key contracts – 17 MW LUELCO EPSA signed in March 2026; 46 MW LUECO contract secured in June 2026
- **Net selling position at 677 GWh for H1 2026**
  - WESM prices remained elevated reflecting recovering demand, peak summer effects, fossil fuel price increases and tighter supply from forced baseload plant outages
- **Retail electricity supply (RES) portfolio at 587 MW[3] as of H1 2026, increasing 12% from Q1 2026**
  - Makati City Local Government Unit and the first households in Rockwell have successfully switched to ACEN RES

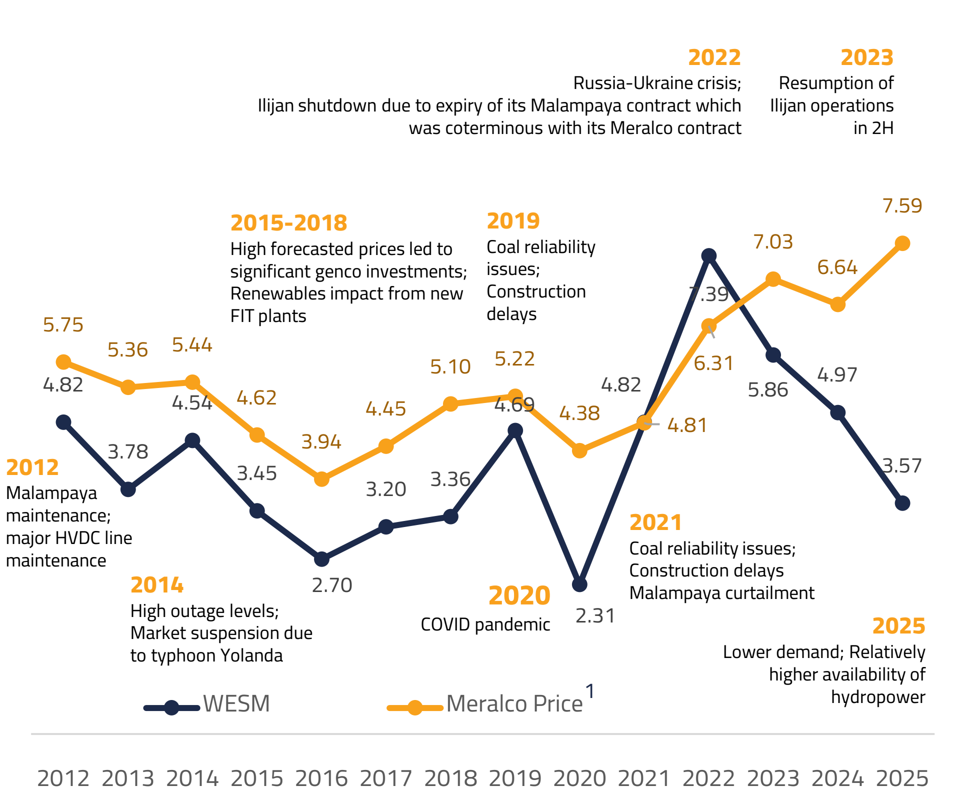
1. Output weighted; covers all renewable energy plants except Bataan Renewable Energy Hub.
2. Excludes YTD June 2026 thermal third party supply of 1,382 GWh.
3. Includes both signed and active contracts.

Historical and Latest Philippine Spot Market Prices

WESM prices remained elevated due to recovering demand, peak summer effects, fossil fuel price increases, and tighter supply from forced baseload plant outages

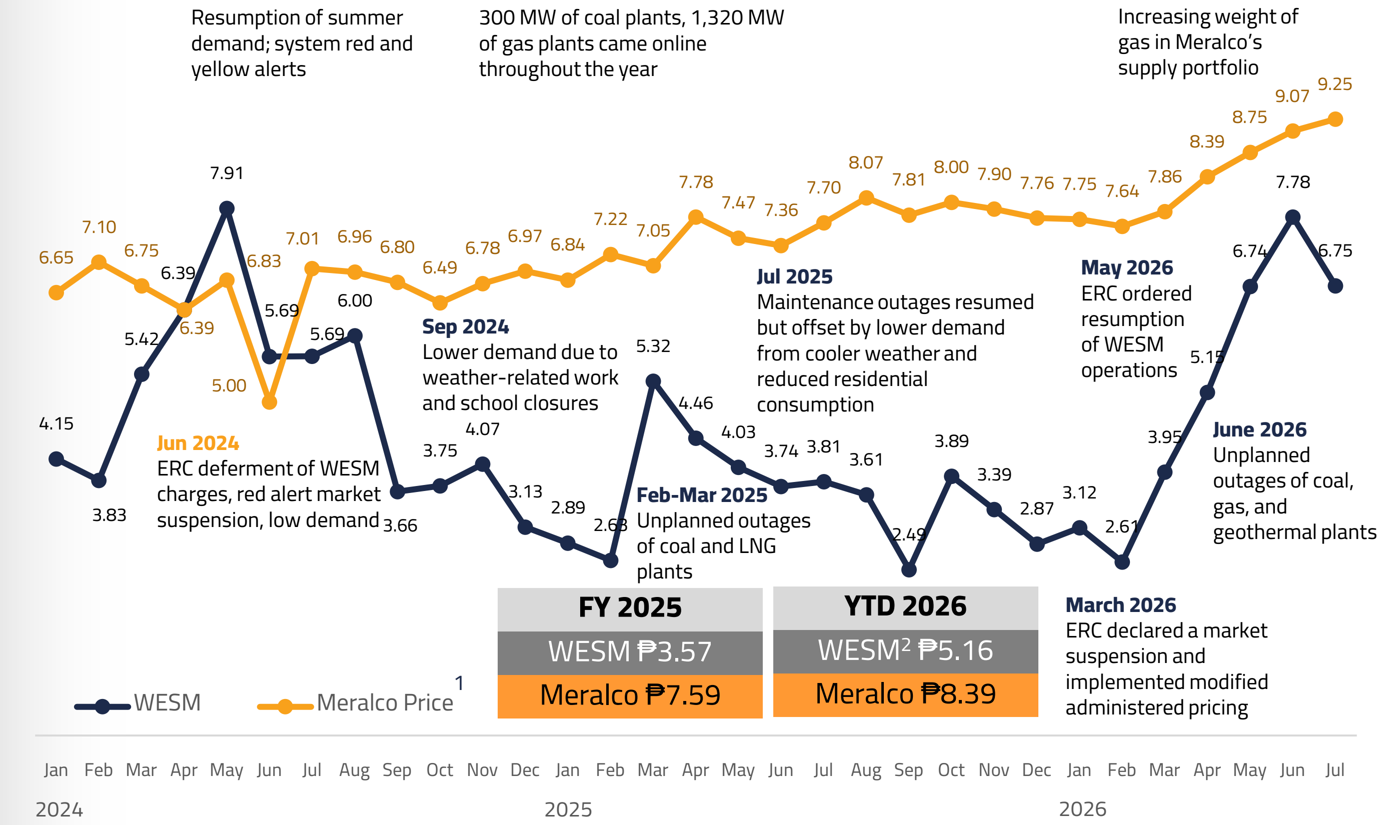
Annual Spot Prices, 2012-25

Generator Weighted Average Price (GWAP) in PHP/kWh



Monthly Spot Prices, 2024-26

Generator Weighted Average Price (GWAP) in PHP/kWh



Source: IEMOP, ACEN company analysis, Meralco website

1. Generation charge, includes charges for interruptible load program (ILP) and generation rate over/under recovery (GOUR).
2. YTD volume weighted average price.

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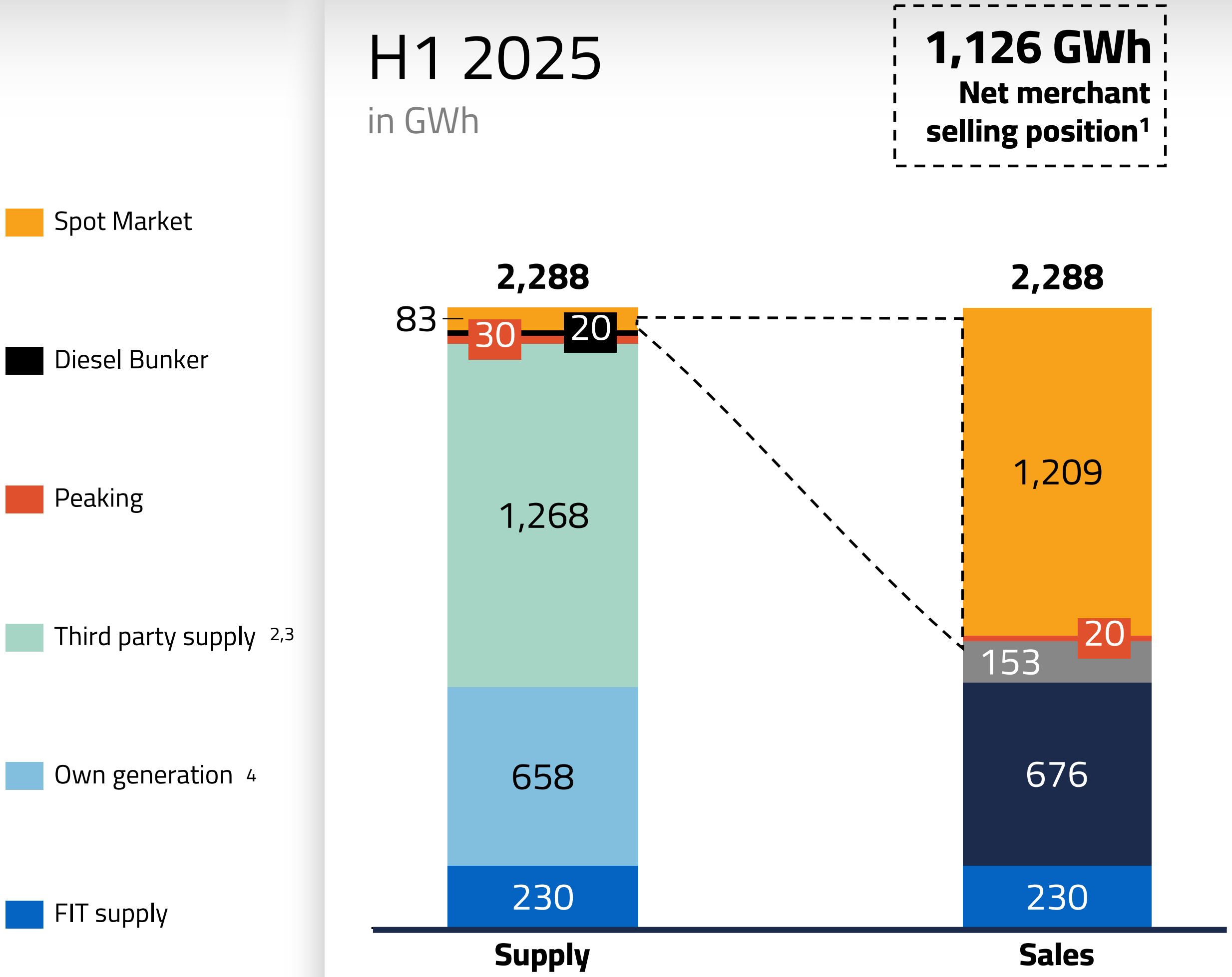
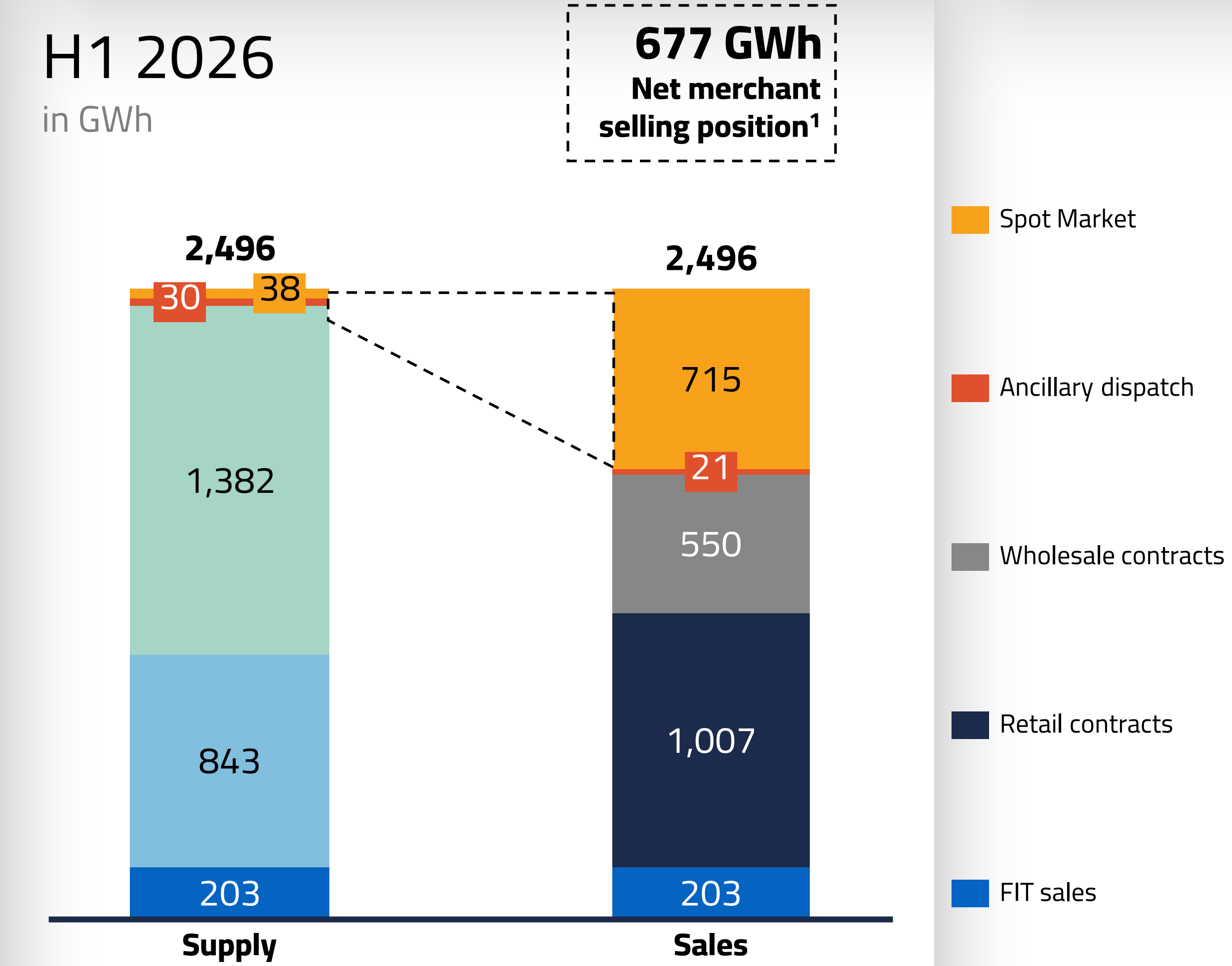
Philippine Spot Market Position

Net selling position narrowed with higher contracted energy sales from retail, Meralco





1. Net merchant selling (buying) position is the difference between gross open spot sales and purchases.
2. SLTEC output included in Third Party Supply.
3. Third Party Supply decline driven by GNPD 80 MW optimization amid low WESM prices; partially offset by implementation of replacement power and higher SLTEC generation.
4. Own Generation represents ACEN's attributable share of total plant output.

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Retail electricity supply update

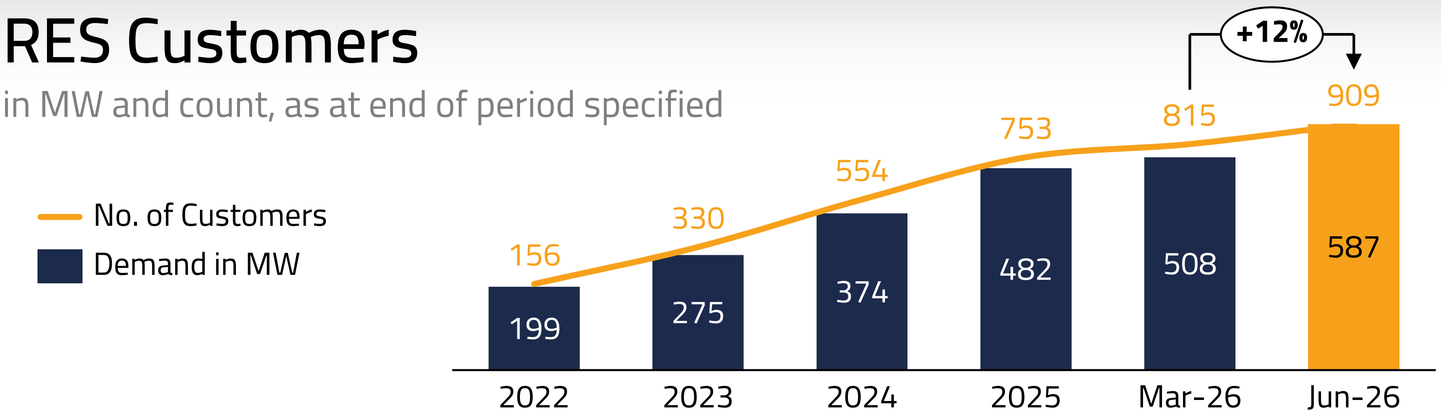
ACEN RES now has 54% share of RE supplier market under GEOP[1]

ACEN RES continues to sign renewable energy supply agreements with key clients:

- 7-Eleven Philippines sign up to 1,450+ stores to renewable energy, the country's largest retail chain to participate in the Retail Aggregation Program (RAP)
- 18 Starbucks outlets are now fully powered by renewable energy
- ACEN RES and ACMobility partner to integrate RE supply with EV charging stations

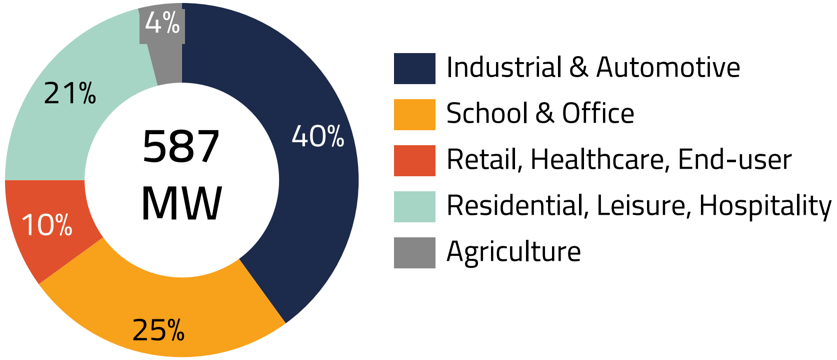
RES Customers

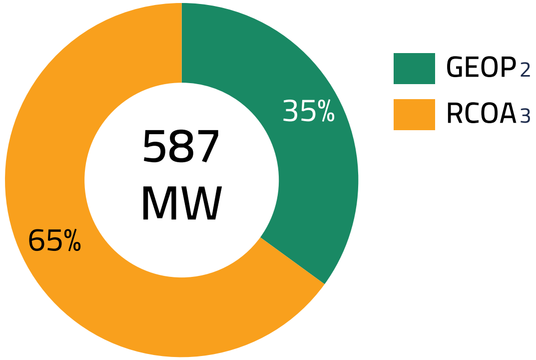
in MW and count, as at end of period specified



Customer Profile

Percent share of MW contracted capacity, 30 June 2026





1. According to the ERC Competitive Retail Electricity Market (CREM) Report as of April 2026.
2. The Green Energy Option Program is a voluntary mechanism under the Renewable Energy Act of 2008 that allows electricity end-users to choose Renewable Energy as their source of energy.
3. Retail Competition and Open Access allows contestable customers to select their supplier of electricity with depending on the average demand set by the Energy Regulatory Commission (ERC); establishment of RCOA is mandated by EPIRA.

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International Assets

Net Attributable Capacity[1] of International Assets

4,258 MW

India
140MW Sitara Solar
70MW Paryapt Solar
420MW Masaya Solar
153MW Maharashtra Wind-Solar
350MW Tejorupa Solar
120MW Bijapur Wind
399MW Sheo 2 Hybrid
389MW Sheo 1 Hybrid

Khanh Hoa & Dak Lak Solar

Vietnam-Lao PDR
252MW Quang Binh Wind
405MW Ninh Thuan Solar
88MW Ninh Thuan Wind
80MW Khanh Hoa & Dak Lak Solar
80MW Mui Ne Wind
60MW Lac Hoa & Hoa Dong Wind
287MW Super Phase 1 Solar[2]
600MW Monsoon Wind

Malaysia
80MW Partner Projects

Sitara Solar

Indonesia
656MW Salak & Darajat Geothermal
16MW Salak Binary Plant
40MW Salak U7 Expansion

United States
38MW Chestnut Flats Wind
129MW Stockyard Wind

PENNSYLVANIA

TEXAS

Australia
522MW New England Solar
520MW Stubbo Solar
200MW New England Energy Storage
102MW Jinbi Solar

Other Markets
116MW ACEN C&I Rooftop Solar

● Operating plants
● Under construction

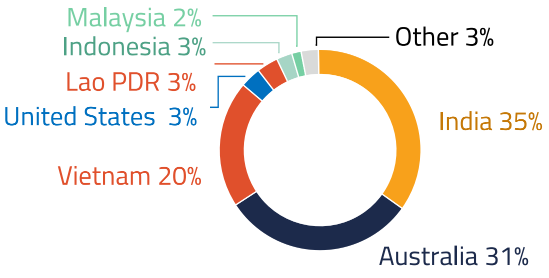
Owned assets as of 30 June 2026;
Shows DC capacities for solar projects.

Stockyard Wind

New England Solar

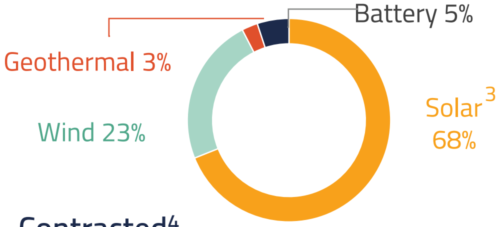
Breakdown by Net Attributable Capacity (International)

Geography

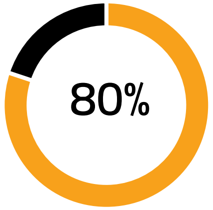


Operating Status

Technology



Contracted[4]



1. Refers to gross capacity of owned assets, multiplied by ACEN's effective economic ownership.
2. Succeeding phases of the Solar NT acquisition subject to completion of conditions precedent.
3. Includes rooftop solar.
4. Refers to percentage of output.

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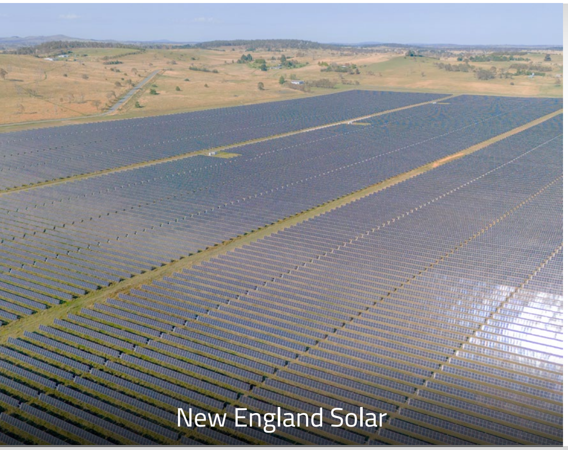
Sustained generation and financial performance due to full contributions from Stubbo Solar and reduced grid curtailment

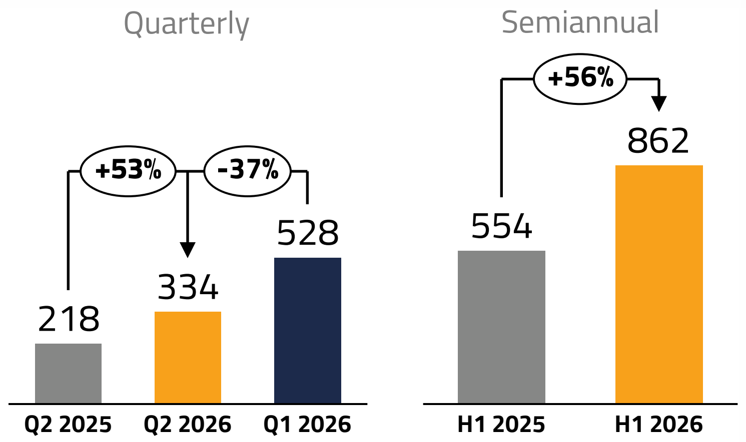


PERFORMANCE UPDATES & HIGHLIGHTS

- Attributable output and project EBITDA rose 56% and 31% YoY, due to reduced grid curtailment at NESF 1 and contributions from Stubbo Solar's full operations, partly tempered by fluctuations in solar irradiance
- Construction continues to advance for the 102 MW Jinbi Solar project

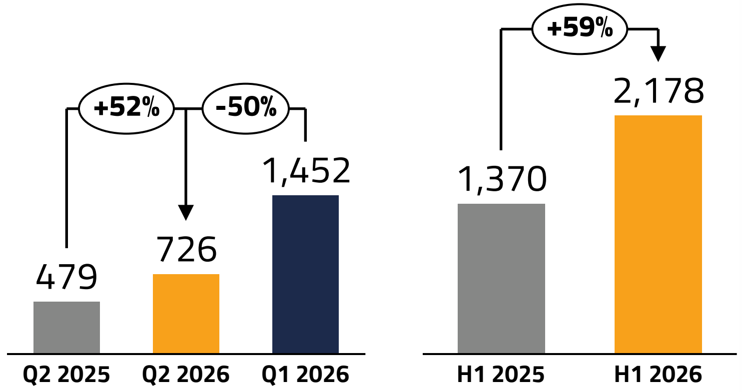
Att. Generation Output

in GWh



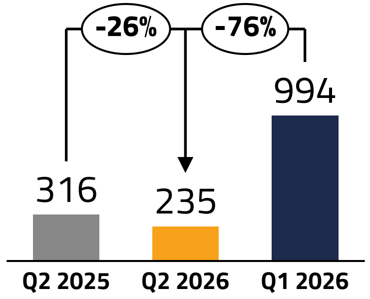
Attributable Revenues

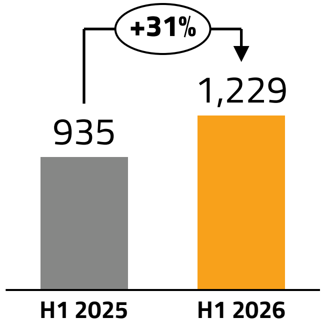
In million PHP



Attributable EBITDA[1]

In million PHP





1. Refers to Project EBITDA; Attributable EBITDA includes ACEN's share of the EBITDA of non-consolidated operating asset.

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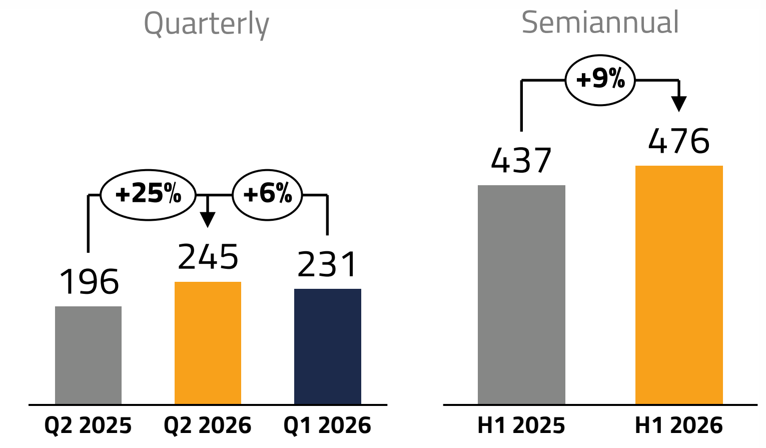
Consistent year-on-year performance; continued advancement across multiple projects under construction

PERFORMANCE UPDATES & HIGHLIGHTS

- H1 2025 output recorded modest growth, supported by the ongoing commissioning of the 153 MW Maharashtra hybrid project, partly offset by lower solar irradiance
- Operating capacity of Maharashtra hybrid project currently at 85 MWac (~123 MWdc) for solar and 29 MW for wind
- Construction progressing at 350 MW* Tejorupa Solar, 120 MW* Bijapur Wind, 399 MW* Sheo 2 Hybrid project, and 389 MW* Sheo 1 Hybrid project

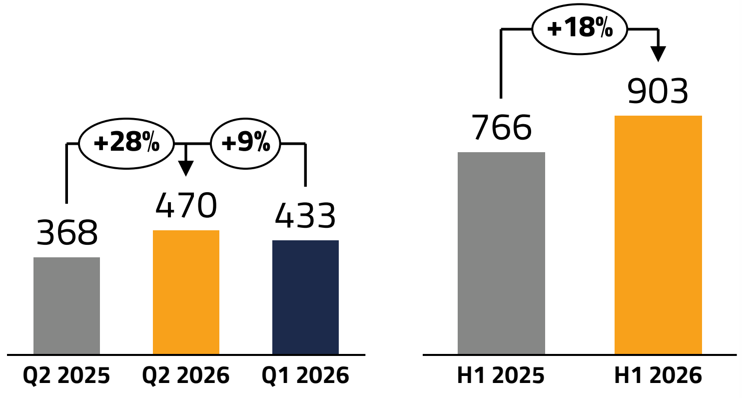
Att. Generation Output

in GWh



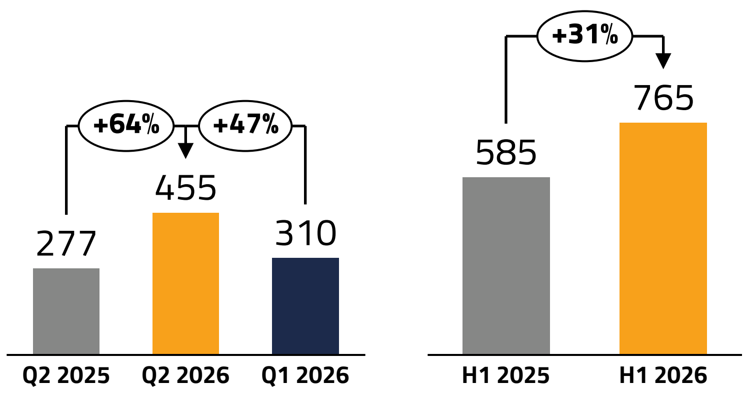
Attributable Revenues

In million PHP



Attributable EBITDA[1]

In million PHP



* Gross capacity

1. Refers to Project EBITDA; Attributable EBITDA includes ACEN's share of the EBITDA of non-consolidated operating asset.

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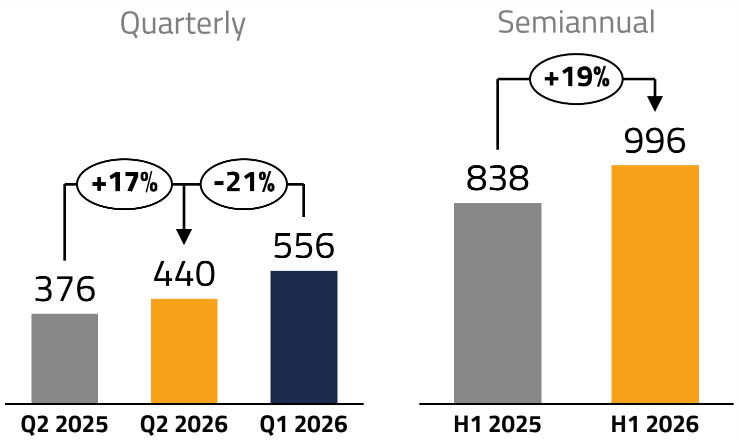
YoY growth underpinned by contributions from Monsoon Wind and improved solar resources

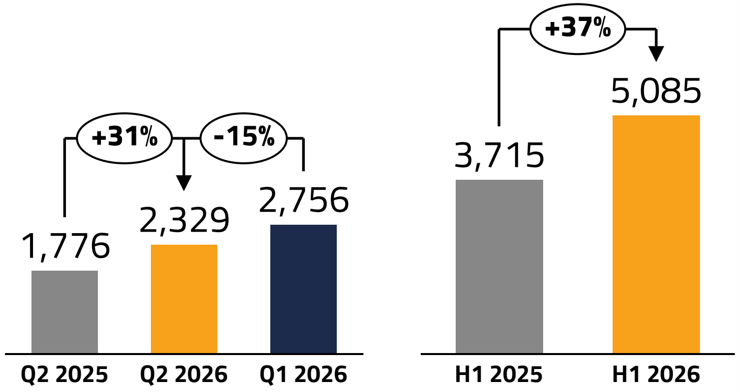
PERFORMANCE UPDATES & HIGHLIGHTS

- Attributable generation and EBITDA rose 32% and 26% YoY, supported by improved solar resources and lower operating costs
- Performance now includes full contributions from Monsoon Wind

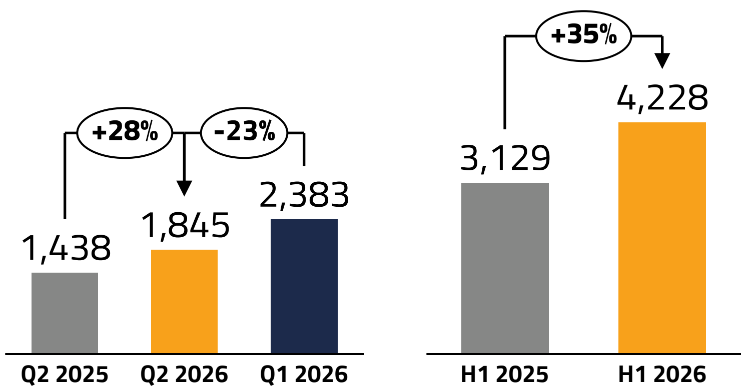
Att. Generation Output
in GWh



Attributable Revenues
In million PHP



Attributable EBITDA[1]
In million PHP



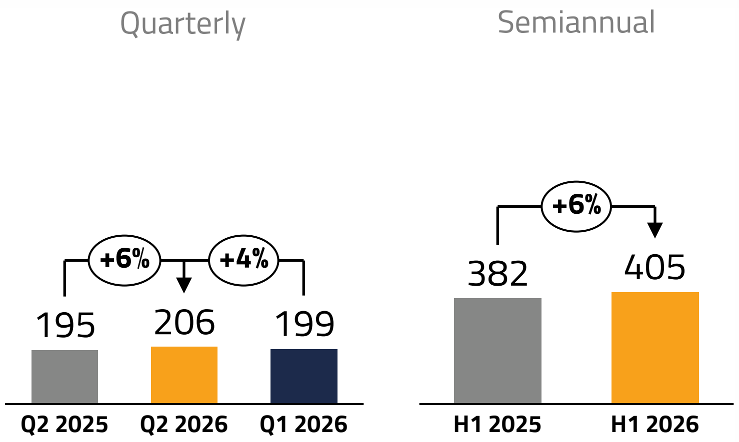
1. Refers to Project EBITDA; Attributable EBITDA includes ACEN's share of the EBITDA of non-consolidated operating asset.

Consistent performance from Salak & Darajat Geothermal; Salak Unit 7 construction progressing

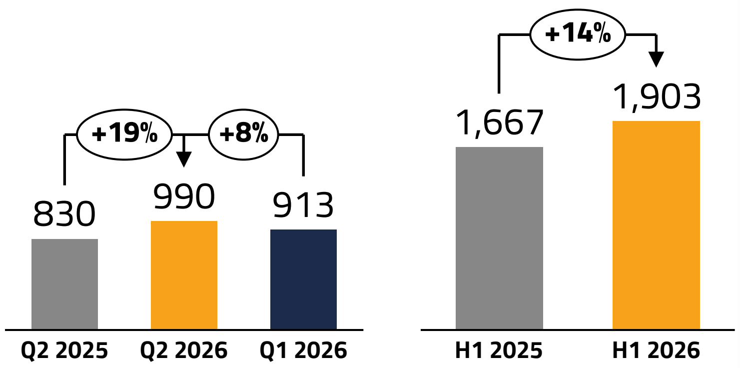
PERFORMANCE UPDATES & HIGHLIGHTS

- Salak & Darajat Geothermal recorded 6% year-on-year increase in attributable generation on the back of sustained operational performance
- Financial performance in turn improved year-on-year
- Construction of 40 MW Salak Unit 7 currently 67% complete

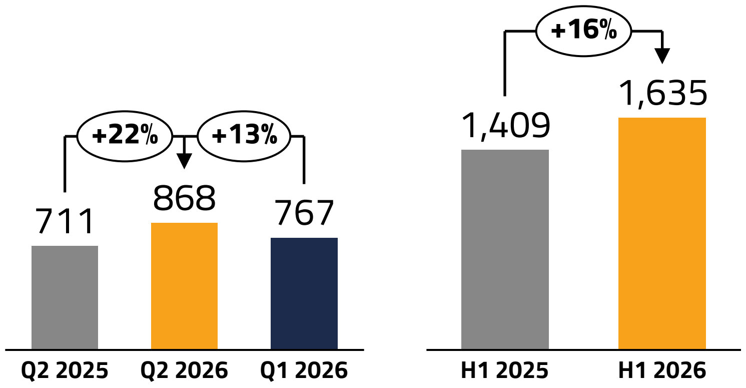
Att. Generation Output
in GWh



Attributable Revenues
In million PHP



Attributable EBITDA[1]
In million PHP



1. Refers to Project EBITDA; Attributable EBITDA includes ACEN's share of the EBITDA of non-consolidated operating asset.

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Balance Sheet Highlights H1 2026

Raising and deploying funds for international investments, and capital expenditures for ongoing projects

Consolidated Balance Sheet

in million PHP

	31 Dec 2025	30 Jun 2026	Change
Assets	361,788	394,974	**+9%**
Cash and Cash Equivalents	18,358	20,222	**+10%**
Long-Term Investments	237,441	258,147	**+9%**
Others	105,989	116,605	**+10%**
Liabilities	200,940	231,013	**+15%**
External Debt[1]	162,712	188,604	**+16%**
Others	38,228	42,409	**+11%**
Equity	160,848	163,961	**+2%**
Equity Attributable to Parent	152,128	155,459	**+2%**
Non-controlling interest	8,720	8,502	**-3%**

	31 Dec 2025	30 Jun 2026	
Statutory Net Debt	144,354	168,382	**+17%**
Gross Debt to Equity	1.02	1.15	
Net Debt to Equity	0.90	1.03	

Attributable Net Obligations

in million PHP

	31 Dec 2025	30 Jun 2026	Change
Statutory Net Debt	144,354	168,382	**+17%**
Attributable Net Debt from Associates and Joint Ventures	57,446	63,467	**+10%**
Attributable Net Debt	201,800	231,849	**+15%**
ACRI Redeemable Preferred Shares[2]	11,820	12,307	**+4%**
Attributable Net Obligations	213,620	244,156	**+14%**

1. Includes short-term and long-term loans payable and notes payable.
2. AC Renewables International

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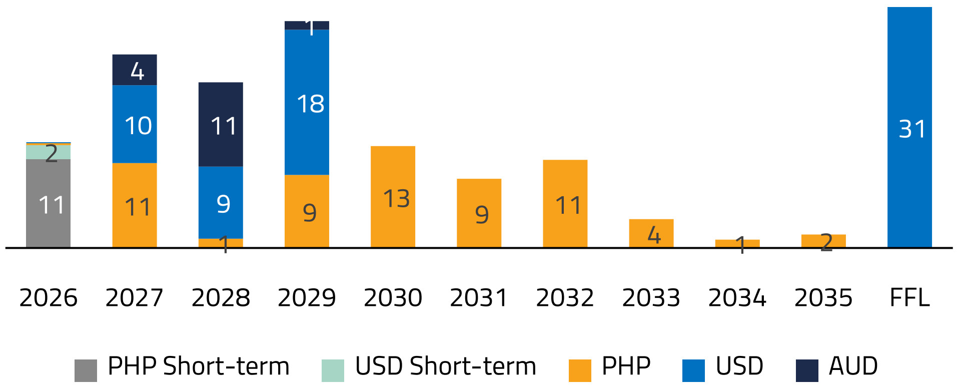
Debt Profile

Coverage ratios and costs remain healthy with maturities spread out; liquidity and credit line availability remain robust

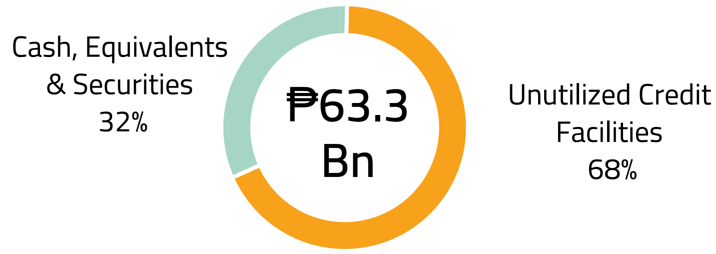
Parent Obligations Maturity Profile[1]

in billion PHP, as of 30 June 2026

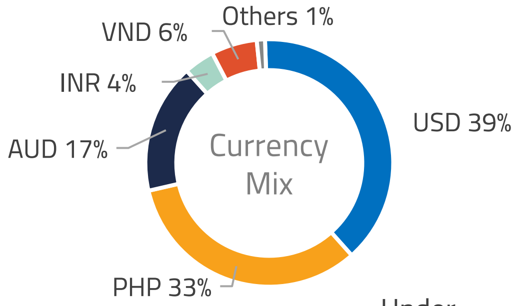


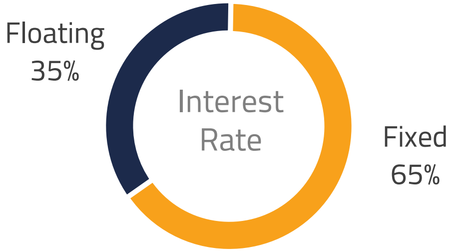
	30 June 2026
Blended cost of debt[2]	5.51%
Average remaining life[3]	2.86 years
Group cash interest cover[4]	1.38x

Liquidity Profile[5]



Profile of Consolidated Attributable Obligations[6]





1. Parent obligations include holding companies' debt and obligations only.
2. Blended cost of debt excludes redeemable preferred shares.
3. Excludes perpetual fixed-for-life debt. Parent obligations only.
4. Defined as attributable EBIT over total attributable gross interest expense of all investee companies.
5. Excludes project finance facilities
6. Includes project finance debt

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Construction Updates 11 August 2026

PHILIPPINES

	Project	Completion	Estimated Annual Output in GWh[1]	Target Completion
	Palauig Solar 2 300 MW_{dc} Zambales	98%[2]	453	H2 2026
	SanMar Solar (Phase 3) 200 MW_{dc} San Marcelino, Zambales	55%	298	H1 2027
	Quezon North Wind 553 MW[3] Real & Mauban, Quezon	30%[4]	1,730	2027
	Sual Solar 69 MW_{dc} Sual, Pangasinan	50%	109	Q4 2026

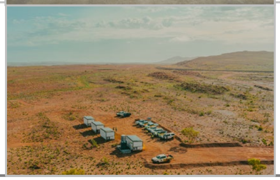
PHILIPPINES

	Project	Completion	Estimated Annual Output in GWh[1]	Target Completion
	Palauig Solar & Energy Storage[5] 35 Mw_{ac} Palauig, Zambales	14%	N/A	Q1 2027
	Palauig Solar & Energy Storage[6] 240 Mw_{ac} Palauig, Zambales	2%	N/A	2027
	SanMar Solar & Energy Storage[7] 500 Mw_{ac} Palauig, Zambales	2%	N/A	2027

1. Expected annual output; all MW capacities and GWh output figures shown in gross terms
2. Refers to Palauig 2 solar plant only
3. Total for Quezon North 1 (345 MW) and Quezon North 2 (208 MW)
4. Refers to phase 1 only
5. 140 MWh capacity
6. 520 MWh capacity
7. 1,000 MWh capacity

Construction Updates 11 August 2026

AUSTRALIA

	Project	Completion	Estimated Annual Output in GWh	Target Completion
	New England Energy Storage[2] 200 MWac Uralla, NSW	87%[3]	N/A	H2 2026
	Jinbi Solar 102 MWdc Pilbara, WA	4%	242	Q3 2028

INTERNATIONAL

	Project	Completion	Estimated Annual Output in GWh	Target Completion
	Bijapur Wind 120 MW Karnataka, India	13%	381	2027
	Tejorupa Solar 350 MWdc Rajasthan, India	26%	762	2027
	Sheo 1 Hybrid[5] 389 MWdc Rajasthan, India	7%	894	2027

INTERNATIONAL

	Project	Completion	Estimated Annual Output in GWh	Target Completion
	Sheo 2 Hybrid[5] 399 MWdc Rajasthan, India	11%	886	2027
	Salak & Darajat Unit 7 40 MW Java, Indonesia	67%	320	Q1 2027
	Partner Projects 80 MWdc Malaysia	91%	71	2026

1. Expected annual output; all MW capacities and GWh output figures shown in gross terms
2. 400 MWh capacity
3. Percent disbursed of overall project cost
4. Solar portion upsized to 124 MWdc to take advantage of recent decline in module prices
5. Final configuration subject to confirmation

Sustainability and other corporate milestones

ACEN partners with BPI Foundation to Advance Financial Literacy for ACEN's Host Communities

- ACEN signed a three-year partnership with BPI Foundation to roll out the FinEd Unboxed program across ACEN's host communities, with implementation beginning in 2026.
- The program aims to reach 3,000 beneficiaries over three years, equipping communities with practical financial management skills to strengthen long-term economic resilience.

ACEN and BDO Network Bank expand financial literacy and digital banking to farmers in Ilocos Norte

- ACEN partnered with BDO Network Bank to provide financial literacy training and access to digital banking services to over 300 farmers and seedling producers supporting ACEN's Conservation Estate.
- The initiative enables beneficiaries to receive digital payments, build savings, and improve financial management – supporting more sustainable livelihoods.

ACEN maximizes the value of NorthWind, Southeast Asia's first wind farm

- This strategic asset optimization enhances the performance, reliability, and long-term value of the 52 MW NorthWind project.
- The initiative demonstrates how responsible asset stewardship can maximize the value of existing renewable energy infrastructure while advancing circularity.

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Takeaways H1 2026

- **Improved 1H performance year on year**, driven by 21% increase in renewables generation as newly operating plants contributed in full
- **Contracting remains a strategic priority**, with continued market volatility and overall underlying demand growth
- **ACEN remains positioned to benefit from near-term tailwinds** including current spot price environment and geopolitical pressure on global energy supply
- **Further strategic expansion ahead** – accelerating BESS construction across the portfolio, as well as integration and scaleup of the now-consolidated India platform
- **Funding for continued growth** to be anchored on value realization, third party capital and hybrid equity-linked capital


Alaminos Solar


Super 1


NorthWind

ACEN

For more information, kindly contact

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Or visit

acenrenewables.com/investors