



2025 Interim Results Presentation

Six months to 30 June 2025

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The Company's investment strategy may see investment risk concentrated in specific assets, geographies, and technologies or to specific counterparties. This means that the overall performance of the Company may be more sensitive to the returns in respect to those assets, geographies, types of assets, and / or counterparty.

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Key Investor Risks

A decision to invest in the Company should take into account all of its objectives as described in the Prospectus. A list of relevant risks can be found in the Prospectus, Annual Report and KID on the Company website:

<https://www.octopusrenewablesinfrastructure.com/all-reports-publications>

1. An investment in the Company will place capital at risk. The value of investments can go down as well as up, so investors could get back less than the amount invested.
2. Neither past performance nor any forecasts should be considered a reliable indicator of future results.
3. The Company may not meet its investment objective and there is no guarantee that the Company's target level of dividends and other distributions and/or target returns, as may be from time to time, will be met.
4. The company's investment strategy sees investment risk concentrated in specific assets, geographies and technologies or to specific counterparties. This means that the overall performance of the Company is more sensitive to the returns in respect of those assets, geographies, types of asset and/or counterparties.
5. The Company invests in renewable energy assets which are under construction and, therefore is exposed to certain risks, such as permit risks, cost overruns, construction delay and construction defects, which may be outside the Company's control.
6. Renewable energy assets which are under development may be exposed to risks such as delays in obtaining or the failure to obtain the requisite grid access rights, land consents, planning and/or regulatory consents, and cost overruns which may be outside the Company's control. In certain scenarios it may not be possible for a development to proceed or a development may become unviable for the Company. The Company may not be able to fully recover the value of its investment where a project does not advance beyond the development phase.
7. Renewable energy assets are illiquid and may prove difficult to sell. The price achieved on any realisation may be at a discount to the prevailing valuation of the relevant renewable energy asset(s). This may have an adverse effect on the Company's profitability, the net asset value, and/or the price of the Company's shares.
8. The Company makes investments which are based in countries whose local currency is not Sterling, and makes and/or receives payments that are denominated in currencies other than Sterling. Changes in exchange rates will, therefore, affect the net income and net asset value of the Company.

Key Investor Risks

9. The Company and members of its Group may use borrowings for multiple purposes, including for investment purposes. While the use of borrowings should enhance the total return on the Shares, where the return on the Company's portfolio of Renewable Energy Assets exceeds the cost of borrowing, it will have the opposite effect where the return on the Company's portfolio of Renewable Energy Assets is lower than the cost of borrowing.
10. The Company makes investments in projects and concessions with revenue exposure to power prices. The market price of electricity is volatile and is affected by a variety of factors, including market demand for electricity, the generation mix of power plants, government support for various forms of power generation, as well as fluctuations in the market prices of commodities and foreign exchange. Whilst some of the Company's portfolio of Renewable Energy Assets benefit from fixed price arrangements for a period of time, others have revenue which is based on prevailing power prices.

Octopus Renewables Infrastructure Trust ("ORIT")

Presentation team



Chris Gaydon
Investment Director



David Bird
Investment Director



Genevieve Legg
Portfolio Manager

ORIT: The Diversified Renewables Investment Trust

ORIT is the only genuinely diversified investment trust of meaningful scale in the renewables and energy transition space¹

5

Technologies

5

Countries

40

Solar, wind and developer investments²

797 MW

Total capacity²

¹ Based on Octopus Energy Generation review of diversified renewables investment trusts annual & interim reports published in 2024.

² Excludes the Woburn Road battery which was exited during H1 2025. Each developer investment is counted as a single asset. It excludes Irishtown, the sixth site within the Ballymacarney solar complex in Ireland, currently under conditional acquisition

Why we are Different

A unique proposition in a crowded market



Diversified Portfolio

Mitigates risk and volatility



Expert Management

Octopus Energy Generation provides over 150 specialist renewable energy & investment professionals



Added Value

Exposure to developer and construction investments provide capital growth potential



Unlocking Optionality

Developer investments provide access to future project pipelines



Sustainable Investing

SFDR Article 9 product, embodying sustainable practices



Strong Foundation, Well-positioned for Future Growth

Delivering clean energy, income and growth optionality



Established Platform

£540m of Net Asset Value at 30 June 2025

797 MW of existing renewable assets



Stable Financials and Resilient Income

+12.9% H1 2025 shareholder return

8.4% dividend yield



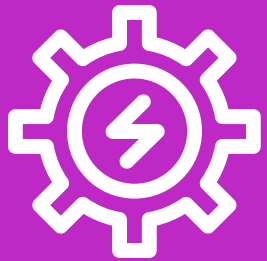
Impactful Portfolio

654 GWh of clean energy generated in H1 2025

158K estimated equivalent homes powered by clean energy

Capital is at risk. Past performance is not a guide to future or expected returns.

Figures at, or over, six months to 30 June 2025



Corporate Activity



A Focus on Capital Allocation

Three core goals set in March 2025



An extended share buyback programme totalling £30m

- £8.5m repurchased in period; £6.2m post period to 15 September 2025
- Balance to be retained to make further purchases as required



Reduce debt to under 40% of GAV by year end

- 47% at 15 September 2025;
- Asset sales anticipated to bring this figure down to <40% before year end



Sell at least £80m of assets to pay down debt

- Several sales processes advanced
- On track to realise the £80m target by year end



Financial Results



Financial Highlights

Stable performance over the six-month period to 30 June 2025

£540m

Net Asset Value ("NAV")
(31 December 2024: £570m)

-0.2%

H1 2025 NAV total return^{1,2,3}
(H1 2024: +2.0%)

99.5p

NAV per Ordinary Share²
(31 December 2024: 102.6p)

+31.7%

NAV total return since IPO
5.1% p.a.^{1,2,3}
(31 December 2024: +31.9%, 5.6%)

12.9%

Total shareholder return^{1,3}
(H1 2024: -16.9%)

£1,010m

Gross Asset Value ("GAV")^{1,4}
(31 December 2024: £1,029m)

1. These are alternative performance measures

2. The NAV as at 30 June 2025 is calculated on the basis of 543,370,568 Ordinary Shares in issue

3. Total returns in sterling, including dividend reinvested

4. A measure of total asset value including debt held in unconsolidated subsidiaries



Note: The value of investments and income from dividends can fluctuate, and there is a possibility that investors may not recover the entire amount originally invested.

Progressive, Fully-covered Dividend

ORIT announced a target dividend of 6.17p per Ordinary Share for FY 2025, an increase of 2.5% over the prior year, in line with 2024 CPI



3.08p

Half year declared dividend, in line with target for the year

6.17p

Target dividend per Ordinary Share for FY 2025 (FY 2024: 6.02p)

1.19x

H1 2025 dividend cover 1.81x excluding debt amortisation

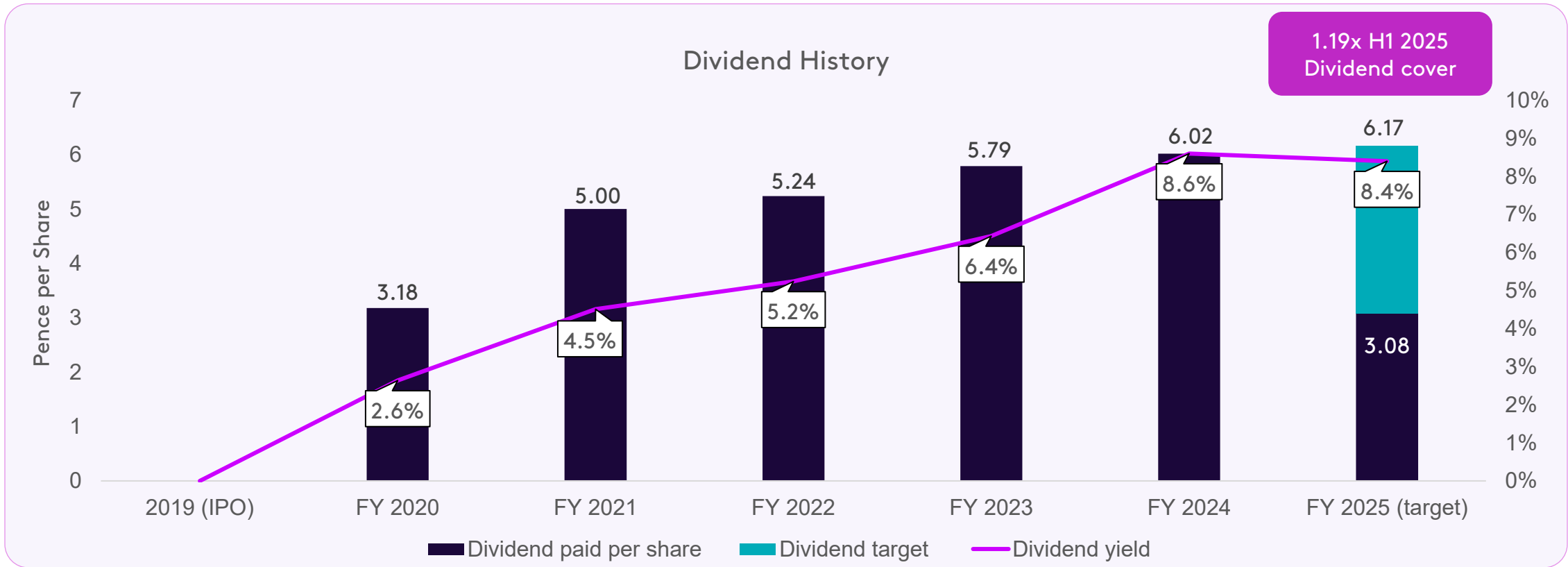
8.4%

Dividend yield¹

¹ Dividend yield is calculated by dividing the target annual dividend per share of 6.17p for FY 2025 by the market share price as at 30 June 2025

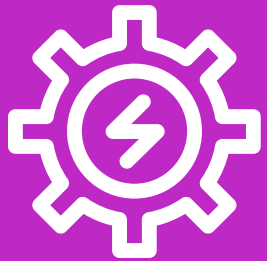
Track Record of Increased Dividends

Dividends fully covered by operational cash flow



Capital is at risk Please refer to the Fund’s constitutional documents for important additional risks, disclosures and information.

1 Dividend yield for FY 2025 is an implied yield, calculated by dividing the target annual dividend per share of 6.17p for FY 2025 by the market share price as at 30 June 2025



Operational Portfolio



Strong Solar Performance Offsetting Lower Winds

Output¹ H1 2025

654 GWh

-1% vs H1 2024
-8% vs budget



Solar

294 GWh

+34% vs 2024
0% vs budget



Onshore
wind

291 GWh

-18% vs 2024
-15% vs budget



Offshore
wind

68 GWh

-19% vs 2024
-7% vs budget

Revenue H1 2025

£68.7m

0% vs H1 2024
-6% vs budget



Solar

£33.1m

+32% vs 2024
+3% vs budget



Onshore
wind

£16.7m

-26% vs 2024
-17% vs budget



Offshore
wind

£18.9m

-10% vs 2024
-10% vs budget

EBITDA H1 2025

£44.3m

-2% vs H1 2024
-7% vs budget



Solar

£25.3m

+37% vs 2024
+4% vs budget



Onshore
wind

£11.9m

-32% vs 2024
-18% vs budget



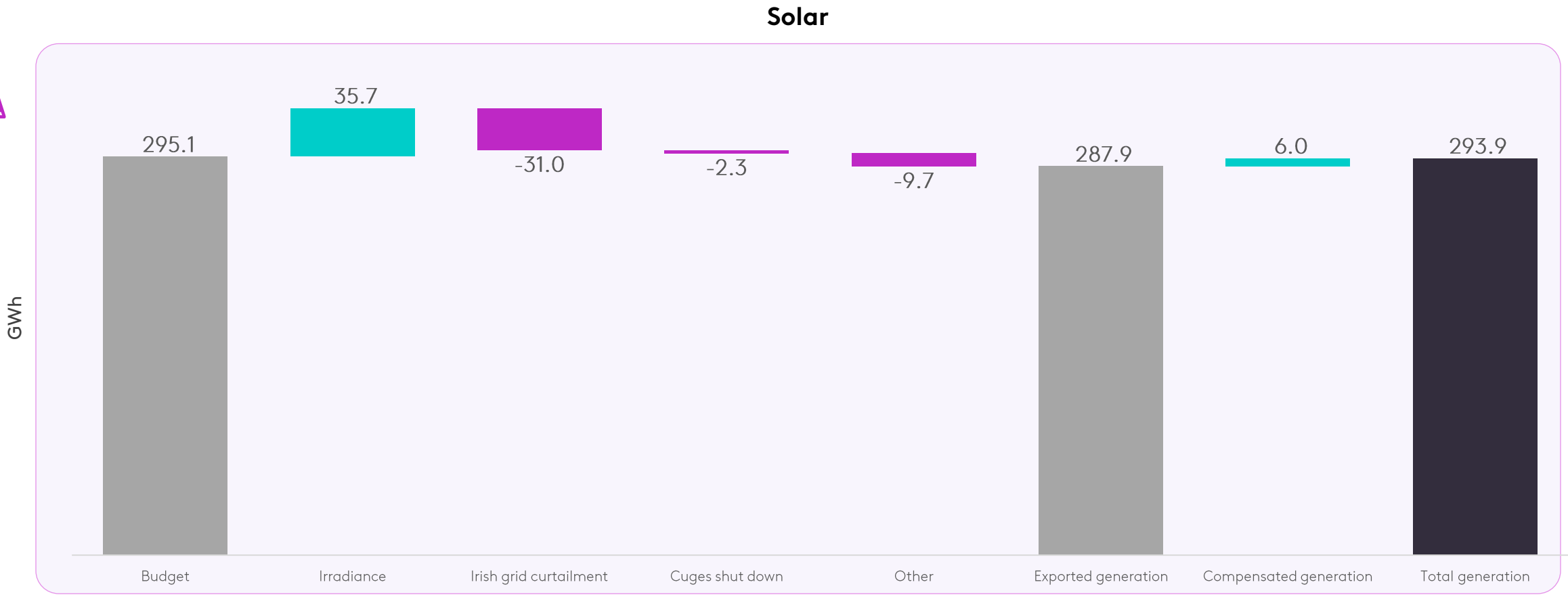
Offshore
wind

£7.1m

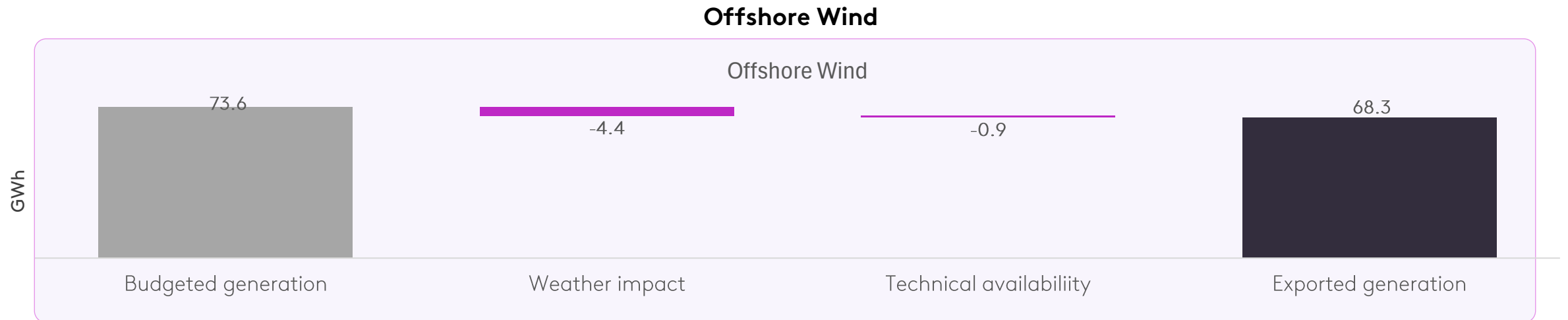
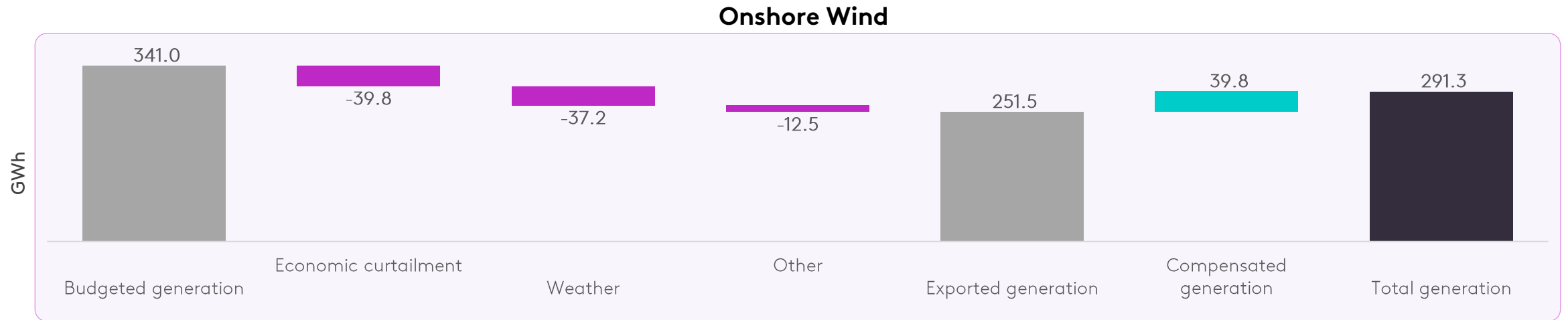
-24% vs 2024
-19% vs budget

¹ Generation quoted is post-compensation (actual output + compensation for equivalent lost production ORIT is entitled to under curtailment and/or contractual mechanisms). H1 2024 generation figures differ from the published figures in the June 2024 Interim Report as they have been restated to include compensated generation from curtailment, making for a like-for-like comparison with the H1 2025 figures.

Strong Solar Generation...



...Offset by Low Wind Speeds

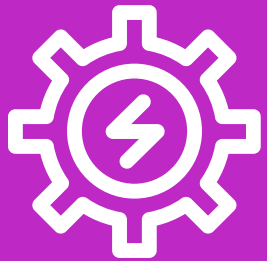


Investing for a positive impact

ORIT has a clear impact Strategy and aims to enhance impact where possible through initiatives aligned with three responsible investment lenses:



¹ Calculations based actual renewable energy generated figures excluding compensated generation and conditional assets . Please refer to the ORIT ESG & Impact Strategy for methodology



Investment Activity



Portfolio Activity

A focus on selective investments



Irishtown Conditional Acquisition

32.6 MW Irish solar site

Sixth site at the Ballymacarney complex

Completion expected H2 2026

Forward purchase of €27 million



Norgen Commitment

Finnish onshore wind and solar PV developer

€3.4 million follow-on investment

Holding restructured

30% stake

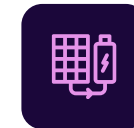


Simply Blue Group Carve-out

Floating offshore wind and sustainable fuels developer

Sustainable fuel project carved out to form Nova Sustainable Fuels

22.5% stake (in the Nova business)



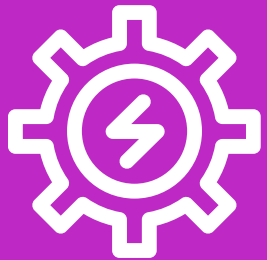
BLC Energy Follow-on

Solar PV and co-located BESS developer in the UK

£1.5 million follow-on

Investment supports Phase 2 pipeline

100% stake



Portfolio



A Highly Diversified Portfolio of Renewable Energy Assets

Helps to reduce risk and volatility

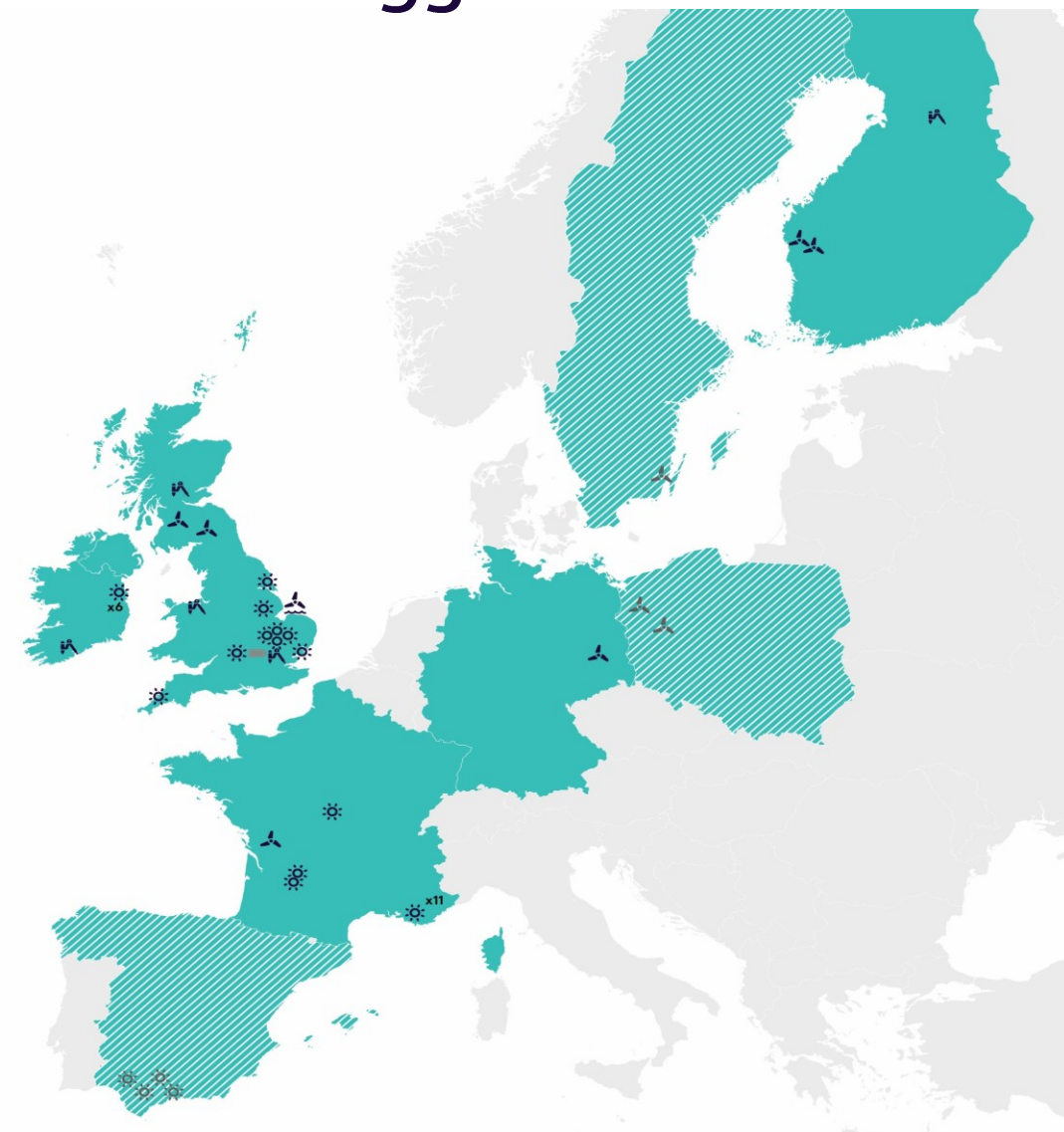
5
Technologies

797
Total capacity
(MW)¹

40
Assets¹

5
Countries

-  Onshore wind
-  Offshore wind
-  Solar
-  Battery
-  Developer
-  Current portfolio geographies
-  Exited assets
-  Exited geographies

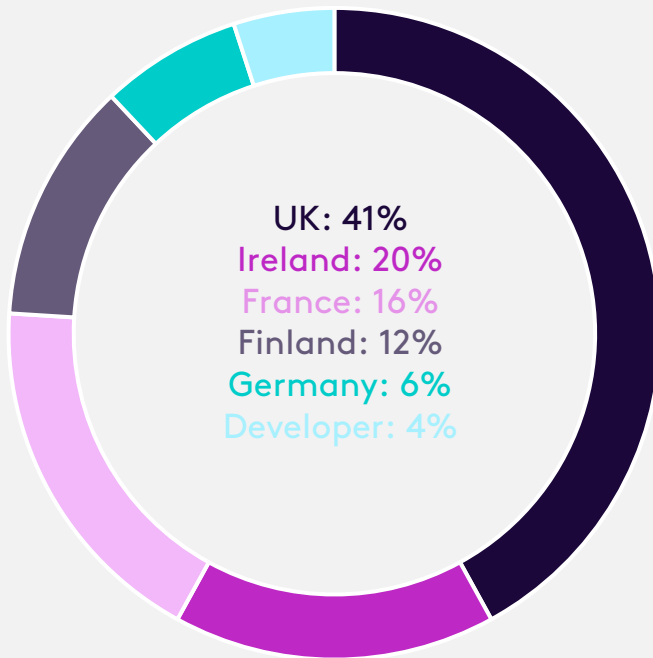


¹ Excludes the Woburn Road battery which was exited during H1 2025. Each developer investment is counted as a single asset. It excludes Irishtown, the sixth site within the Ballymacarney solar complex in Ireland, currently under conditional acquisition

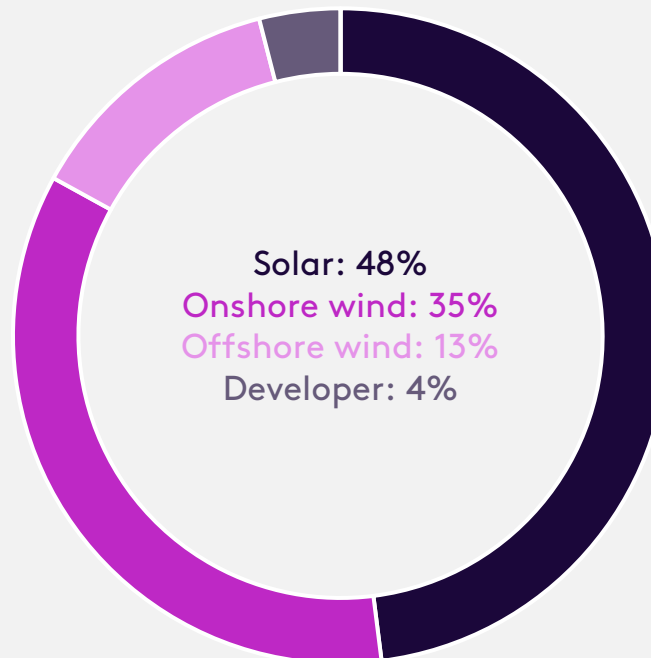
A Well-diversified Portfolio by Country and Technology

£1,026m Total value of all investments¹

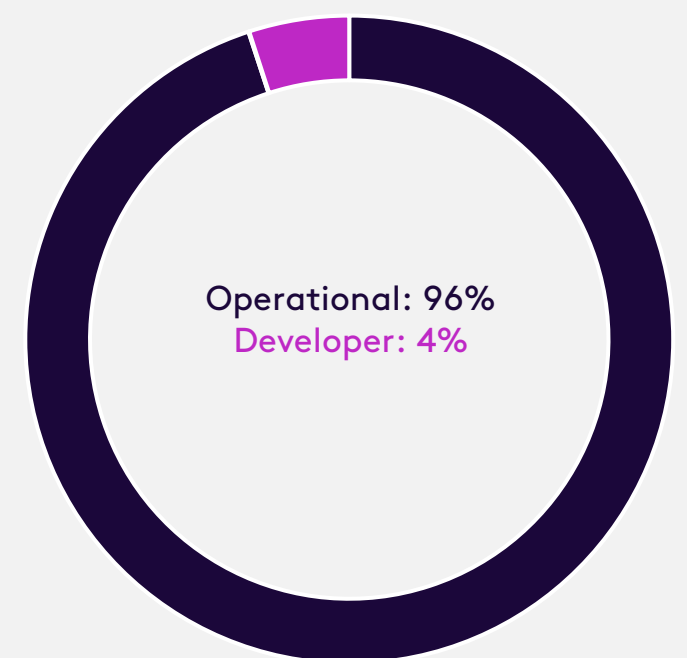
Country



Technology



Asset Phase



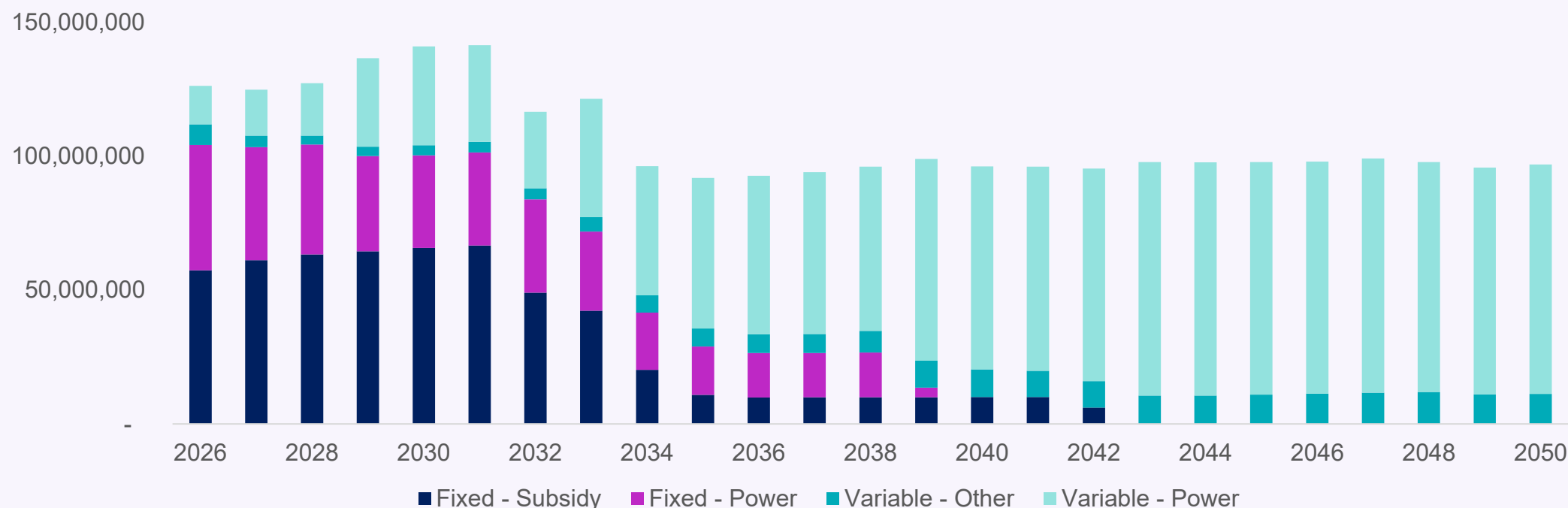
1. Portfolio composition on a total value of all investments basis in line with the Company's Investment Policy as at 30 June 2025. The investments are valued on an unlevered basis and including amounts committed but not yet incurred. Sum may not add up due to rounding.

High level of protection against near-term power price volatility...

...and declining near-term electricity price forecasts

85% fixed revenue
for the next two
years

Fixed vs Variable Revenue Split

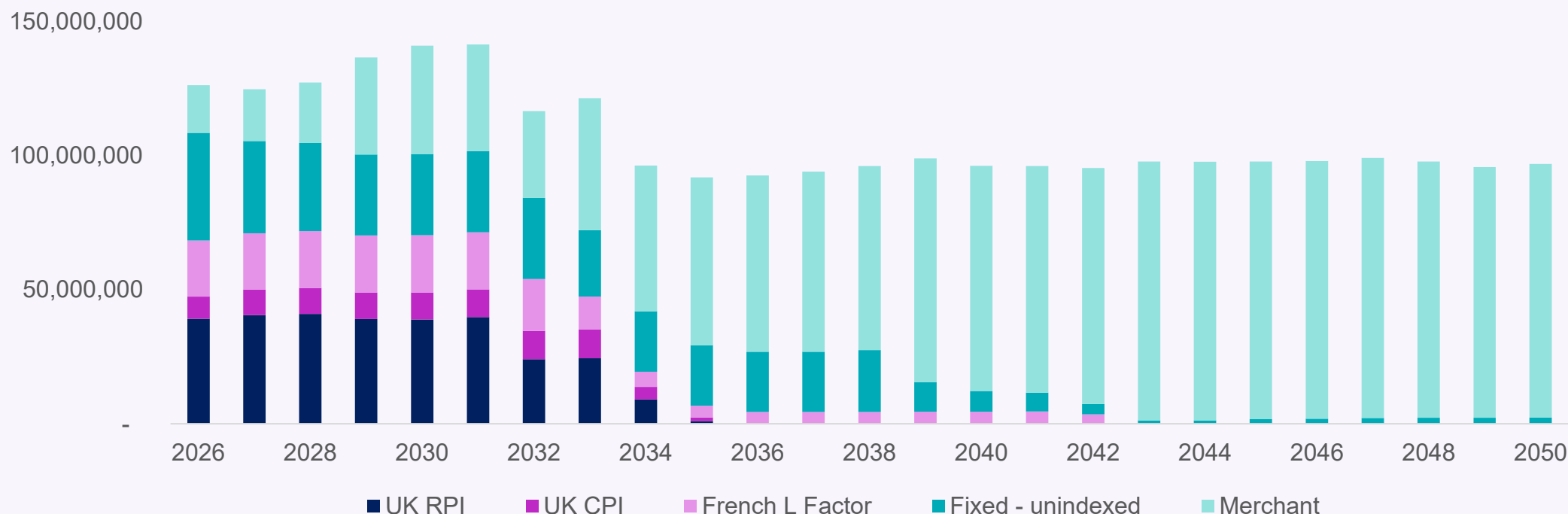


High proportion of inflation-linked revenues

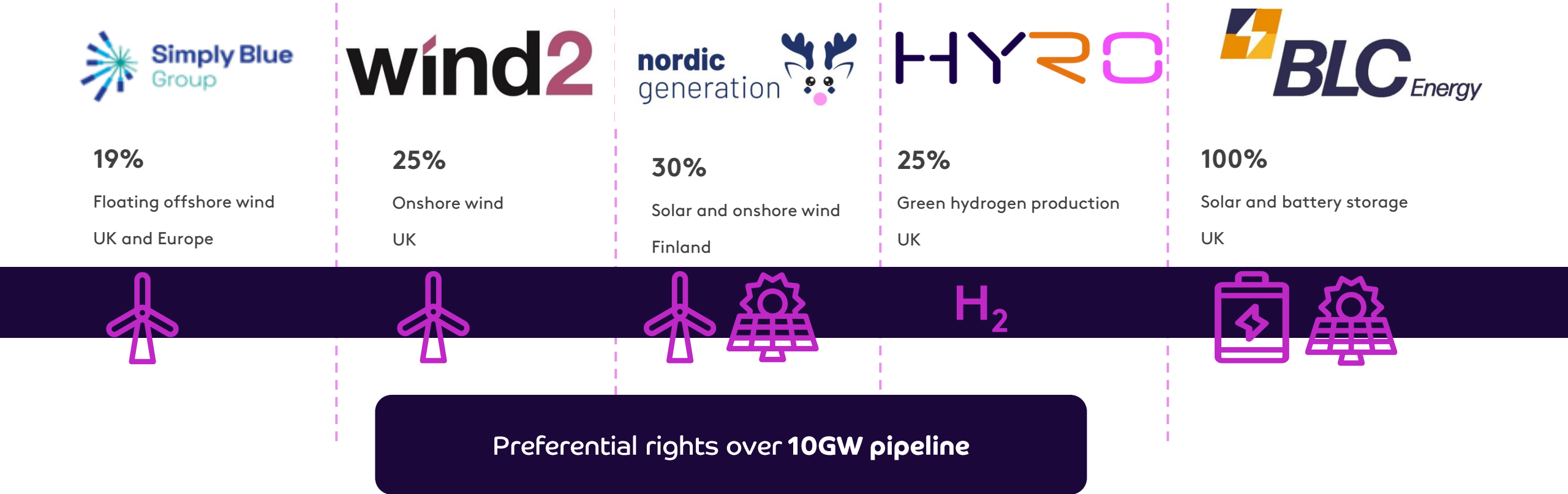
Supports progressive dividend policy

47% Inflation-linked revenues over 10-year period

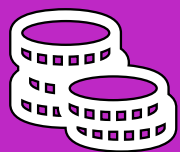
Inflation-Linked Revenue Split



Investment in developers brings optionality over future investment opportunities at construction-ready stage



As at 30 June 2025. An investment in the Company will concern the acquisition shares in the Company, and not any of the underlying assets. Please note that this investment is not necessarily representative of future investments that the Company will make. There can be no guarantee of future success.

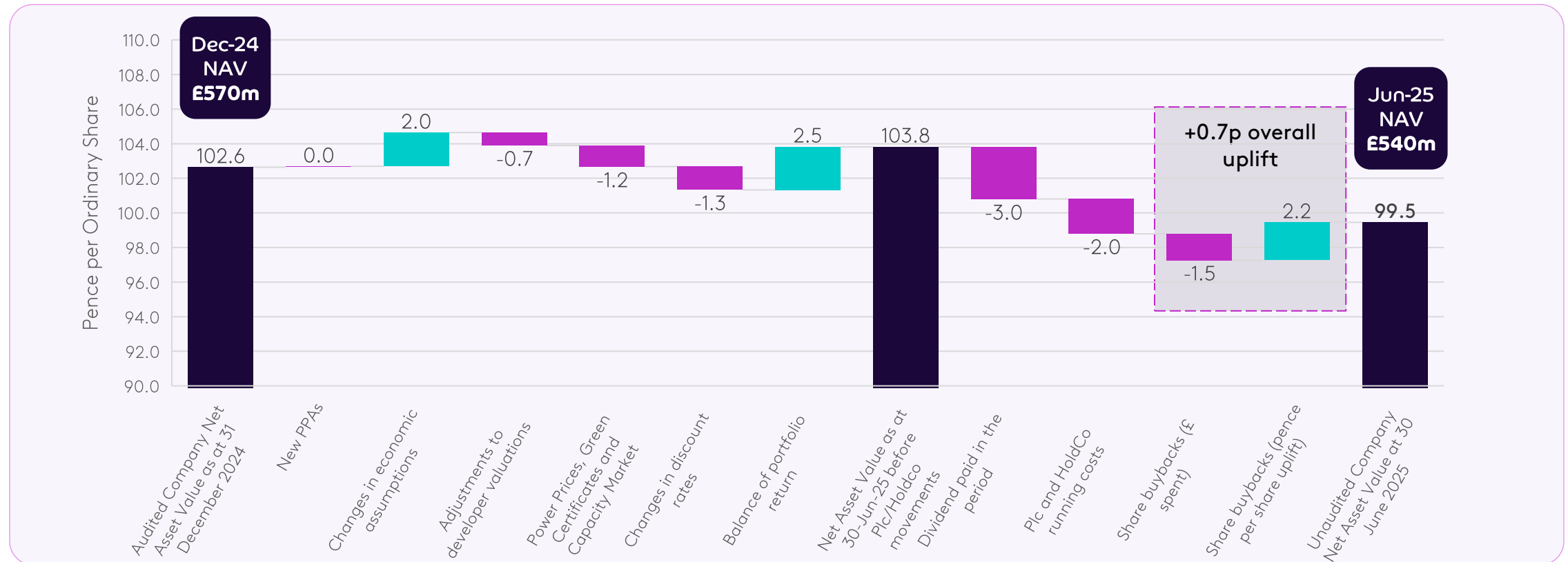


Valuations



NAV per Share Movement in H1 2025

Positive macroeconomic uplift and discount unwind partially by lower power prices, higher discount rates, and fund-level costs/dividends



Share buybacks: During the six months to 30 June 2025, the Company repurchased 12.3 million shares for a total consideration of £8.5 million and an average price of 66.9p.

Key Valuation Assumptions

Key inputs that drive ORIT’s portfolio value

	Country	Long-term inflation		Taxation	
	UK	2.25% ¹	=	25.0%	=
	France	2.0%	=	25.0%	=
	Ireland	2.0%	=	12.5%	=
	Finland	2.0%	=	18.0% ²	↓
	Germany	2.0%	=	15.8%	=

Key

 Positive change to valuation assumption

= No change

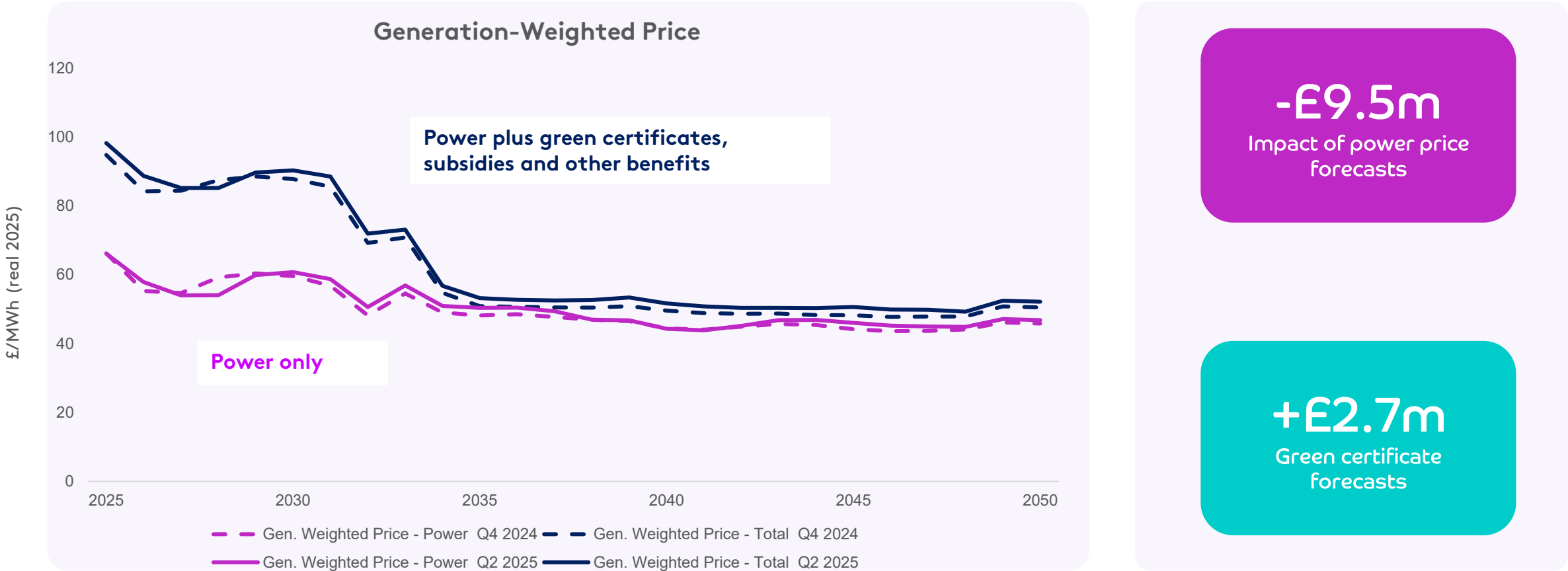
 Negative change to valuation assumption

1 UK RPI (annual average): 3.6% during 2025, 3.25% to 2029 and then 2.25% from 2030 onwards. The RPI forecast for 2026 to 2029 were revised upwards during the period from 3.0% to 3.25%.

2 Valuation movement reflects a planned reduction in Finland’s corporation tax rate from 20% to 18%, effective from 2027.

Changes in Wholesale Energy Prices and Green Certificates

Valuation decrease of £6.8m over the period from green certificate and power prices forecasts



This slide contains forward-looking statement based upon certain assumptions. Actual events may differ materially from those assumed. There can be no assurance that estimated projections can be realised, that forward-looking statements will prove to be accurate, or that actual projections will not be materially lower than those presented. As at 30 June 2025.

Weighted Average Discount Rate Increased to 7.9%

Reflects alignment with prevailing market conditions and transaction evidence

	30-Jun-25	31-Dec-24
Weighted average discount rate	7.9%	7.4%
Total portfolio		
Levered IRR (GBP)	7.9%	7.4%
<i>Levered IRR (local currency)</i>	7.5%	7.0%
Gross Asset Value (GAV; £m)	1,010	1,029
Total Leverage %GAV (plc)	47%	45%
Return expected on the development stage assets	+0.3%	+0.3%
Increase in return associated with the additional leverage from the RCF	+0.1%	+0.4%
Adjusted average discount rate	8.2%	8.1%

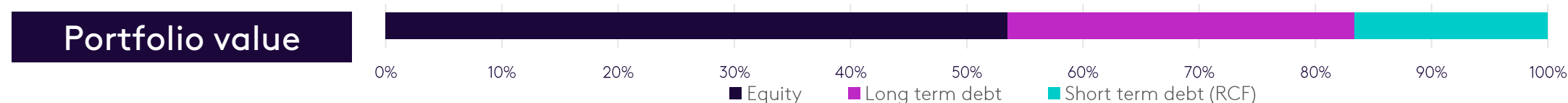
Note: Totals may not sum due to rounding.

**Adjusted weighted
average discount rate**

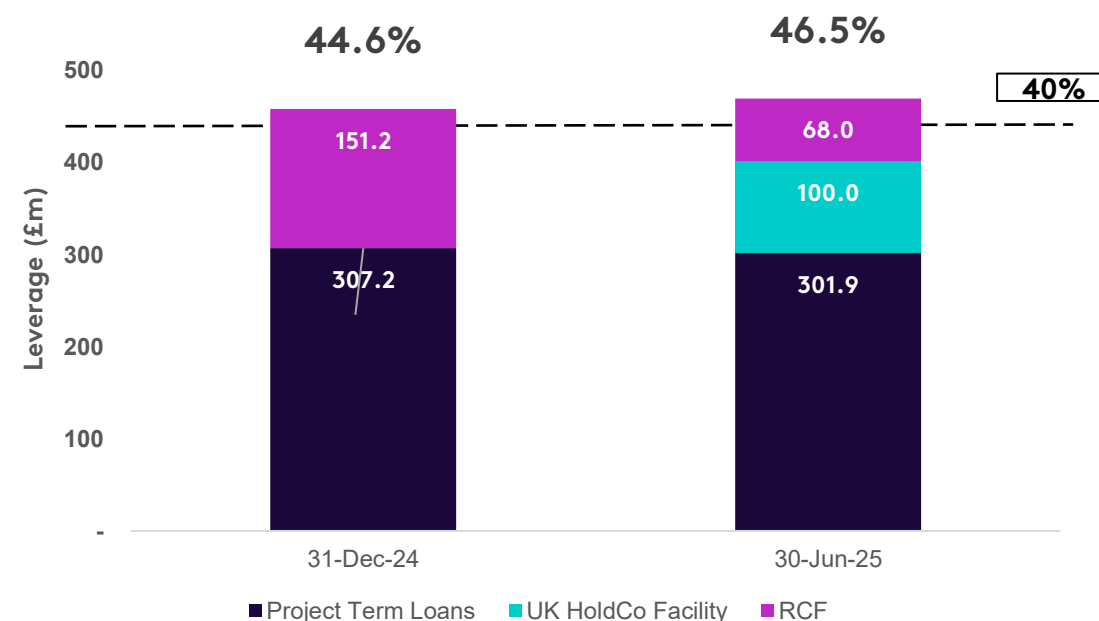
8.2%

Indicative of return
expected on the
development stage assets,
RCF impact

Gearing Stable in the Six-month Period



Debt Summary (£m)	Total Debt	RCF	UK HoldCo Facility	Project Term Loans
Amount (£m)	469.9	68.0	100.0	301.9
Debt (% GAV)	47%	7%	10%	30%
% Hedged	71%	0%	75%	85%
Average cost of debt	3.6%	6.0%	5.3%	2.5%
Average remaining term	10.3	2.7	4.8	13.9



- In March 2025, the RCF term was extended from February 2026 to June 2028, and the size significantly reduced from £270.8m to £150m
- In February 2025, a new £100 million five-year facility was secured with three existing RCF lenders, backed by UK operational solar and onshore wind assets with long-term fixed revenues
- These proactive measures have reduced the average cost of debt from **4.0% as at year end to 3.6% as at 30 June 2025**



ORIT Outlook



Strong Foundation, Well- positioned for Future Growth

A solid platform for ORIT 2030



Established Platform



Stable Financials and Resilient
Income



Impactful Portfolio

ORIT 2030: Strategic Priorities

A renewed focus on delivering long-term NAV per share growth

Grow

Invest for NAV growth through disciplined deployment into higher-return construction and developer opportunities

Return

Deliver attractive returns targeting 9-11% over the medium to long-term while maintain progressive dividends and disciplined balance sheet management



Scale

Build a larger, more investable company with the ambition to grow to around **£1 billion +** in NAV by 2030 (combination of organic and inorganic growth)

Impact

Scale with purpose and resilience adding new clean capacity and supporting the energy transition



Q&A



Appendices About ORIT and OEGEN



ORIT's Differentiated Strategy Seeks to Optimise Returns

ORIT focus on development and construction offers investors the opportunity for capital growth alongside sustainable income

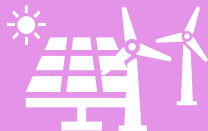
Expert Management

Unrivalled expertise



Diversified Portfolio

Managing risk and volatility



Added Value

Additionality, active management & strategic investment allocation



Unlocking Optionality

Proprietary pipeline with developer investments



Sustainable Investing

Embodying sustainable practices



ORIT Key Terms

To provide investors with an attractive and sustainable level of income returns, with an element of capital growth, by investing in a diversified portfolio of Renewable Energy Assets in UK, Europe and Australia

Key Investment Policy

- Deliver an attractive and sustainable level of income returns with an element of capital growth through acquiring operational, construction ready, in construction and development renewable assets
- Invest in diversified portfolio across Europe and Australia
- Focus on solar PV, onshore and offshore wind with no more than 20% of GAV allowed in other renewable assets

Target Net Total Return

- 9-11% p.a. over the medium to long-term¹

Dividend

- Announced and paid quarterly
- Progressive dividend policy
- Target is 6.17p in FY 2025¹

Typical Asset Return

- Operational assets: 6.5-8.3%²

Leverage

- Maximum 40% long-term structural debt & 25% short-term RCF

Exchange

- Official List, London Stock Exchange
- Awarded LSE Green Economy Mark
- ISIN: GB00BJM02935, SEDOL: BJM0293
- Ticker: ORIT

Shares in Issue

- 543,370,568

Delegated Investment Manager

- Octopus Renewables Limited (trading as Octopus Energy Generation)

Board

- Independent board of non-executive directors

Management Fee

- 95bps (reducing to 85bps above £500m) on equal weighting of (i) NAV and (ii) average of the closing daily market capitalisation

Currency

- GBP

Financial Year End

- 31 December

Website

- www.octopusrenewablesinfrastructure.com

1. The dividend and total return are targets only and not profit forecasts. There can be no assurance that they will be met or that the Company will make any distributions at all and they should not be taken as an indication of the Company's expected future results. Accordingly, potential investors should not place any reliance on these targets in deciding whether or not to invest in the Company and should decide for themselves whether or not the target dividend and target net total shareholder return are reasonable or achievable. 2. Typical returns based on the manager's experience and not profit forecasts. There can be no assurance that actual asset returns will be consistent with the above and they should not be taken as an indication of the Company's future results.

Experienced Board of Directors

Board of Directors with on average 30+ years of experience



Phil Austin, MBE
Non-executive Chair,
Chair of the
Nomination
Committee

- Chairman of Jersey Electricity plc
- Formerly deputy CEO of HSBC Offshore business
- Founding CEO of Jersey Finance Ltd, the body that represents and promotes Jersey's finance industry
- Fellow of the Chartered Institute of Bankers and a Fellow of the Chartered Management Institute.



James Cameron
Non-executive Director
and Chair of the
Management
Engagement Committee

- Serves on a number of boards and advisory committees
- Examples include: Honorary Senior Research Fellow in the Grantham Institute on Climate Change and Environment, Imperial College; Chairman of Crown Agents; Senior advisor to Pollination Global; Director of Ignite Power



Sally Duckworth
Non-executive Director
and Chair of the Audit
and Risk Committee

- Audit and Risk Chair of JPMorgan Japanese Investment Trust plc, Chair of the UK Sustainability Disclosure Technical Advisory Committee, Non-Executive Director of Molten Ventures VCT and Chair of StorMagic Limited (a private software defined storage company)
- Worked at J.P. Morgan and early-stage venture capital at Quester Capital Management.



Elaina Elzinga, CFA
Non-executive Director
and Chair of the
Remuneration Committee

- Principal in Investments at the Wellcome Trust, a global charity committed to improving human health
- Previously investment manager at Goldman Sachs
- Lead of Absolute Return, responsible for Wellcome's partnerships with managers that have low equity market correlations, including multi-strategy and credit hedge funds, and their climate strategy



Sarim Sheikh
Senior Independent
Non-executive Director

- Worked with General Electric & Shell with deep domain expertise in energy markets, and technology from various commercial, business development, projects, and operational roles
- Served as chair/non-executive director on boards of several listed and non-listed companies in the Netherlands, Croatia, Oman, and Pakistan and on non-profit boards

Octopus Energy Generation - ORIT's Investment Manager

An experienced team of over 150 specialist renewable energy and investment professionals

£7.0bn
AUM

>4.9GW
Capacity



Chris Gaydon



David Bird

ORIT Lead Managers



Adam Christensen



Charlotte Edgar



Genevieve Legg



Kat Siadak



Tom Woolerton

ORIT Team

Finance Manager

Head of IR - Listed

Portfolio Manager

Associate Director- Asset Management

Senior Investment Manager



Sam Goss



James Zhou



Ian Dunn



Julia Gubar



Tom Rosser



Laura Halstead



Osama Raja



Margot Smith

- Investments
- Origination and Deployment
- Divestments

- Energy Markets
- PPA Procurement
- Power Price Exposure
- Government Policy

- Construction Specialist
- Engineering
- Contractor Management

- Development
- Origination
- Pipeline development

- Asset Management
- Technical (Engineering)
- Legal & HSE

- Fund Management
- Accounting
- Valuation
- Investor Relations and Reporting

- Risk
- Compliance
- Product Governance

- ESG & Impact
- Social initiatives
- TCFD & SFDR Disclosures
- Carbon Offsetting

Our key differentiators as a fund manager



Size, scale, experience

150+
energy & investment professionals

100 years
of combined renewables
experience among Investment
Committee members

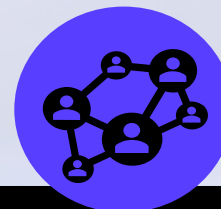


Active asset management

In House
development, construction,
contract, legal and operations
expertise

Engineering experts
with decades of experience
across our technologies

Energy Markets Team
to maximise revenue generation



Strong origination networks

£1.5bn-£2bn p.a.¹
deployment rate

Strong reputation
across the industry and with
vendors

Track record
of direct developer and JV
partnerships



Octopus Energy – an energy specialist

Technology driven
to reshape how green energy is
consumed and generated

Global impact
from scale, accelerating the green
energy revolution

Market expertise
and oversight of energy markets &
pricing

Leading brand
partner of choice

1. Based on Enterprise Value of signed deals for the 2022 and 2023 calendar years.

Contact Us



Investment Manager

- Octopus Renewables Limited
- (trading as Octopus Energy Generation)
- UK House, 5th Floor, 164-182 Oxford Street, London, W1D 1NN



Media and Analyst Enquiries

- Contact Buchanan
- +44 (0)207 466 5000
- Octopus@buchanan.uk.com



orit@octopusenergygeneration.com



0207 466 5000



octopusrenewablesinfrastructure.com



END

