



# 2026 Interim Results Presentation

Six months to 30 June 2026

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This is a marketing  communication

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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

Senior Portfolio Manager

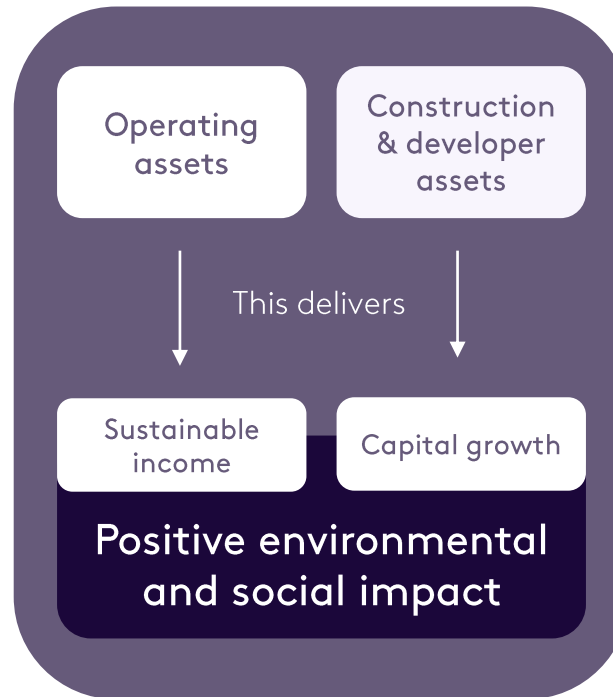
# How ORIT Generates Sustainable Income and Long-term Growth

## Strategy and business model

What we do



What we invest in



Our strategy



Outcome

### Long-term value creation

Attractive, progressive dividends | Capital growth through asset appreciation | Positive contribution to the energy transition

# Why ORIT Now?

A differentiated strategy aligned with long-term energy system needs



Long-term tailwinds remain firmly in place



A resilient income base with a pathway to long-term growth



A clear strategy for the next phase of growth



A platform built for today – and the future



Share price trades at a discount to the underlying asset value



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

# H1 2026: resilient cash performance, lower valuation

The portfolio generated cash ahead of budget and delivered increased dividend cover YoY

Long-term assumption changes pulled valuations down



## Resilient cash performance

Revenue of £67.2 million, 3% ahead of budget

EBITDA of £42.1 million, 6% ahead of budget

Dividend cover increased to 1.38x<sup>1</sup>

## Performance broadly on budget

Solar generation 3% ahead

Offshore wind 5% ahead

Onshore wind 6% below the updated budget

## Updated assumptions reduced NAV

H1 NAV total return of -5.0%

Onshore wind yield review the principal driver

Lower power-price forecasts and higher discount rates also reduced valuations

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

Figures at, or over, six months to 30 June 2026.

<sup>1</sup> After scheduled debt amortisation

# Financial Highlights

Key financial metrics for the six months to 30 June 2026

**£455m**

Net Asset Value ("NAV")  
(31 December 2025: £495m)

**-5.0%**

H1 2026 NAV total return<sup>1</sup>  
(H1 2025: -0.2%)

**86.2p**

NAV per Ordinary Share  
(31 December 2025: 93.8p)

**+21.7%**

NAV total return since IPO  
3.0% p.a.<sup>1</sup>  
(H1 2025: +31.7%, +5.1% p.a.)

**+13.7%**

Share price total return<sup>1</sup>  
(H1 2025: +12.9%)

**£852m**

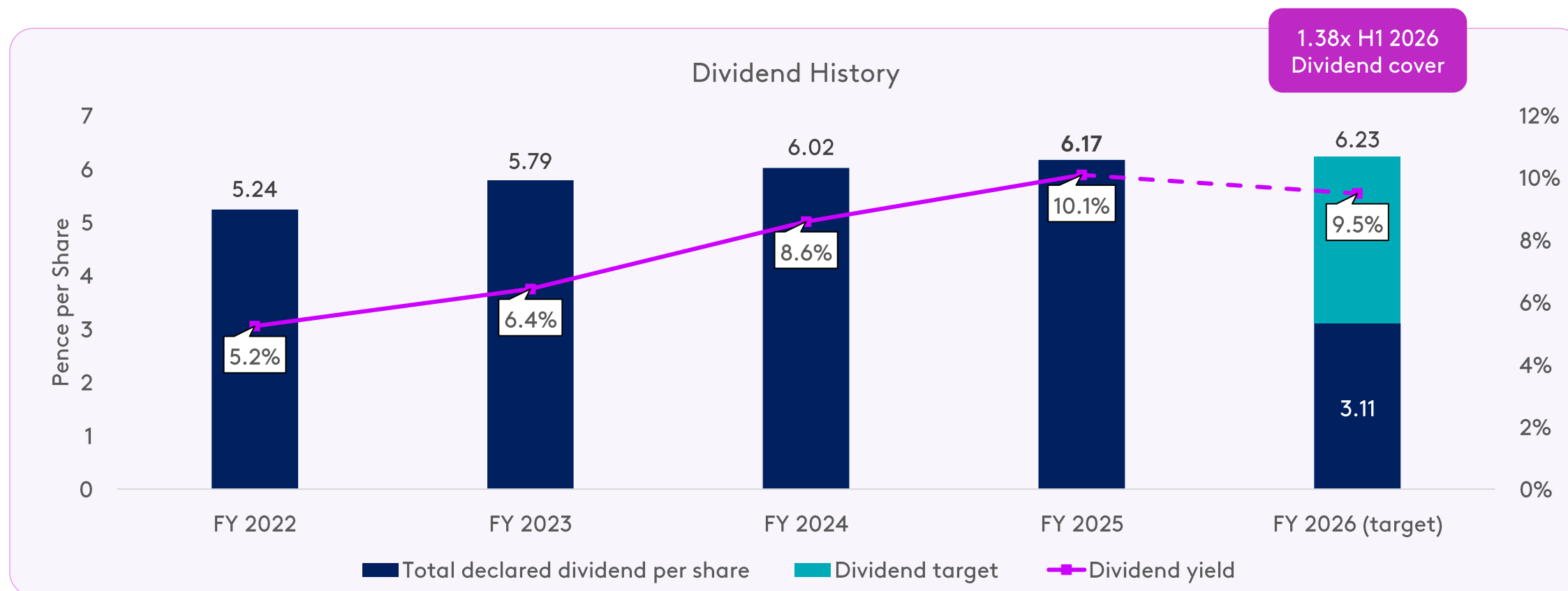
Gross Asset Value ("GAV")<sup>1</sup>  
(31 December 2025: £897m)

**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.

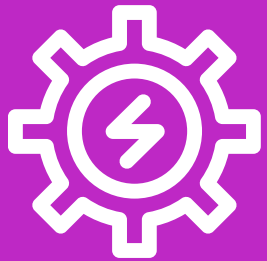
<sup>1</sup> Alternative Performance Measures ("APMs"): These are APMs as defined by the European Securities and Market Authority. Definitions of these measures can be found on pages 56 to 57 of the [2026 ORIT Interim Report](#), along with numerical calculations where appropriate.

# 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.



# Operational Results



# Strong Solar Performance Offsetting Lower Onshore Wind

## Output<sup>1</sup> H1 2026

**614 GWh**

-6% vs H1 2025  
-1% vs budget



Solar

**271 GWh**

-8% vs H1 2025  
+3% vs budget



Onshore  
wind

**263 GWh**

-10% vs H1 2025  
-6% vs budget



Offshore  
wind

**80 GWh**

+18% vs H1 2025  
+5% vs budget

## Revenue H1 2026

**£67.2m**

-2% vs H1 2025  
+3% vs budget



Solar

**£30.2m**

-9% vs H1 2025  
+2% vs budget



Onshore  
wind

**£13.4m**

-20% vs H1 2025  
-3% vs budget



Offshore  
wind

**£23.6m**

+25% vs H1 2025  
+7% vs budget

## EBITDA H1 2026

**£42.1m**

-5% vs H1 2025  
+6% vs budget



Solar

**£22.3m**

-12% vs H1 2025  
+4% vs budget



Onshore  
wind

**£8.5m**

-29% vs H1 2025  
-2% vs budget



Offshore  
wind

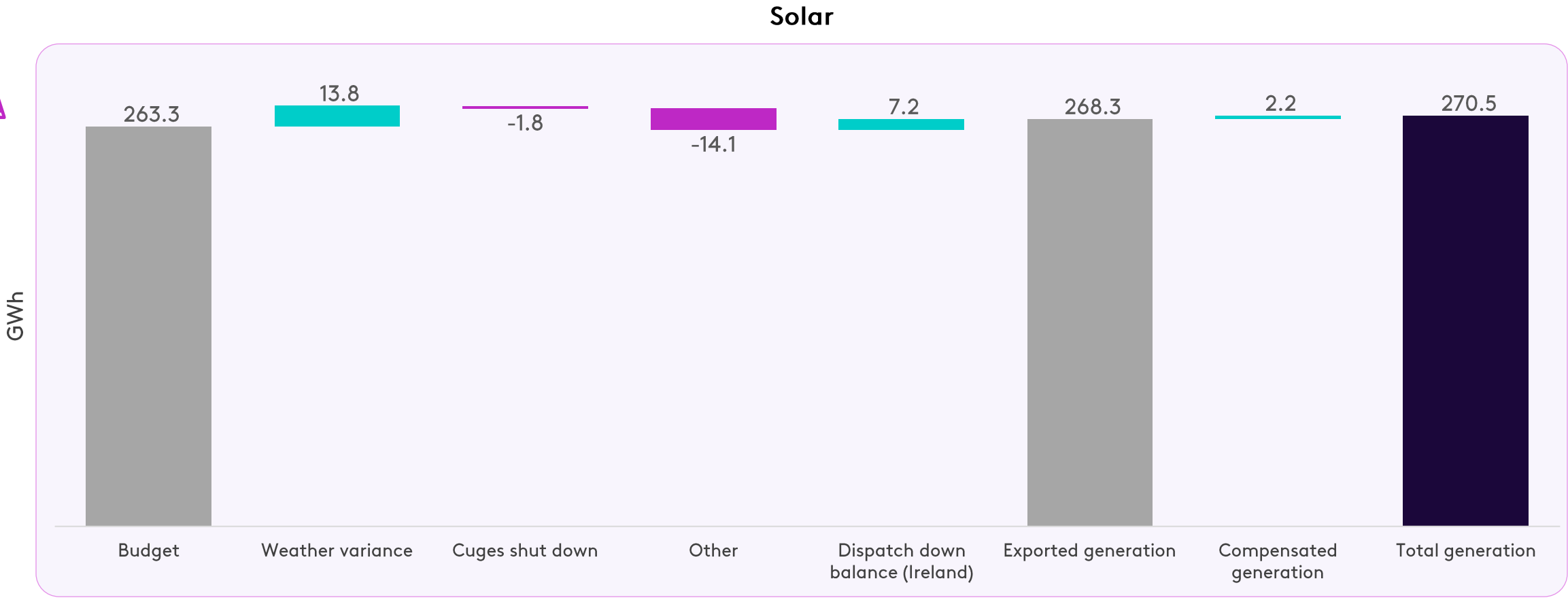
**£11.3m**

+59% vs H1 2025  
+18% vs budget

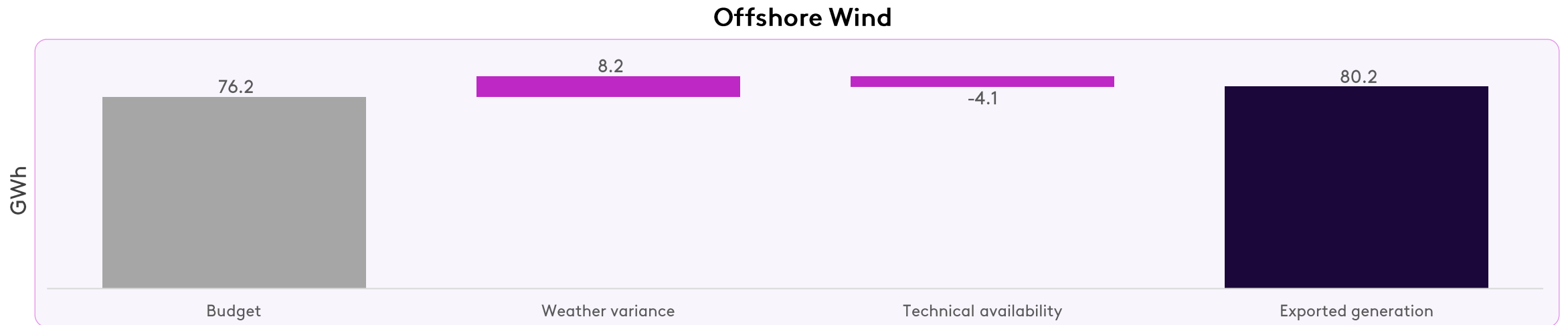
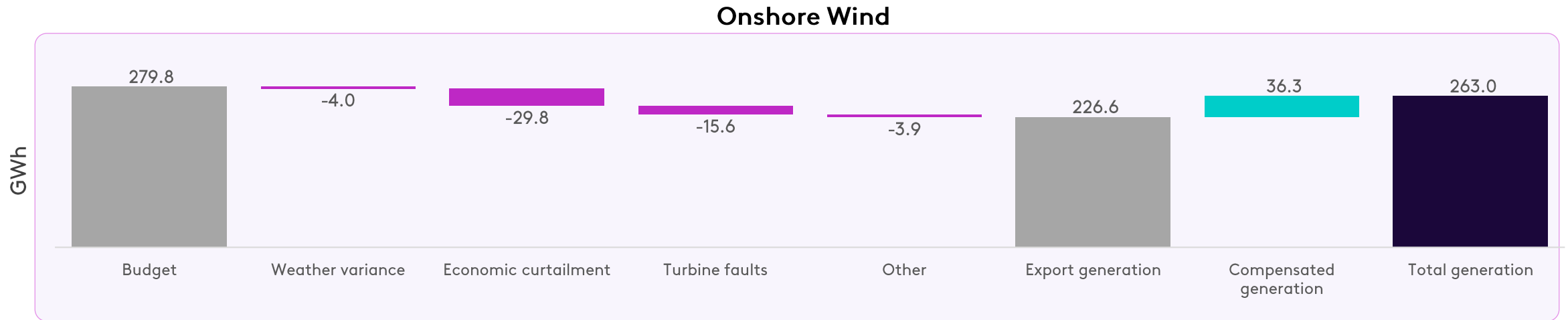
Totals may not sum due to rounding

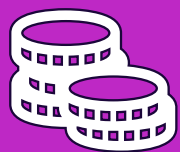
<sup>1</sup> Generation quoted is post-compensation (actual output + compensation for equivalent lost production ORIT is entitled to under curtailment and/or contractual mechanisms).

# Strong Solar Generation...



# ...Offset by Low Wind Speeds



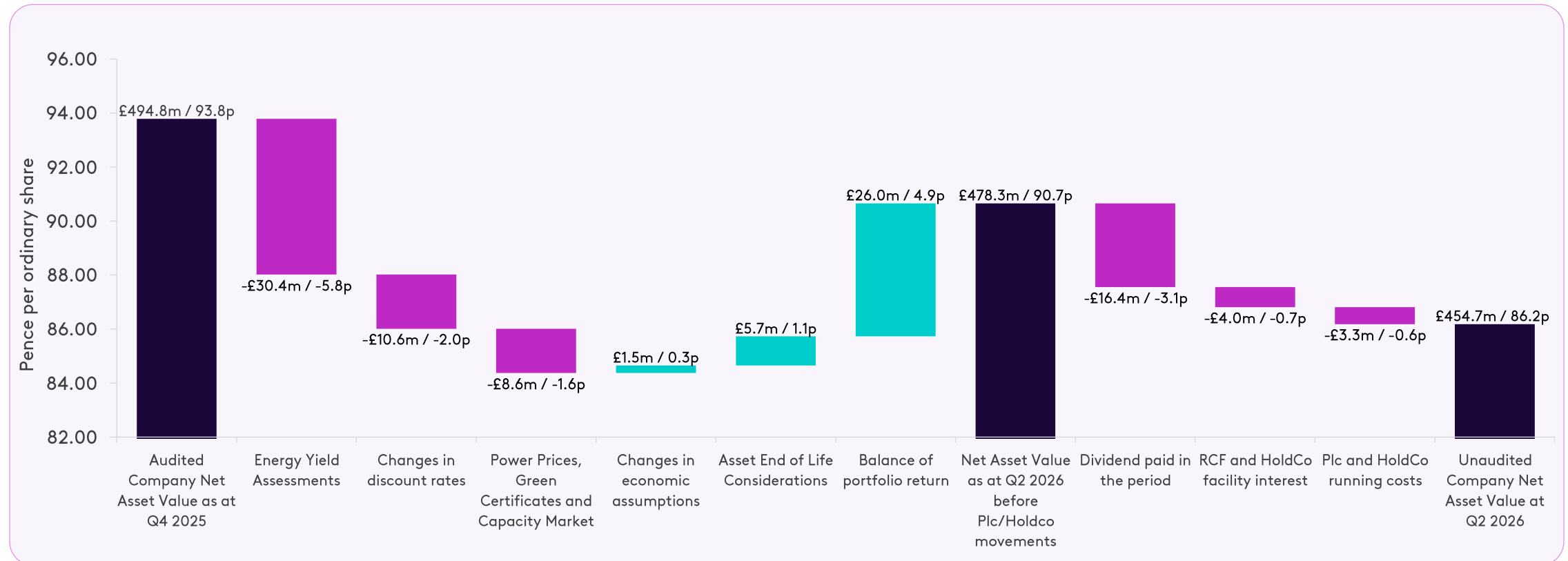


# Valuations



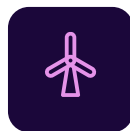
# NAV per Share Movement in H1 2026

Positive movements more than offset by the impact of revised energy yields, lower power prices and higher discount rates



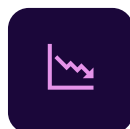
# Onshore wind energy yield review

Updated assumptions reflect substantially longer operating histories



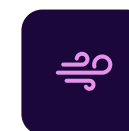
## Why the review was undertaken

- The assets now have sufficient operational data
- Long-term generation reassessed using actual performance



## Impact on NAV

- **£30.4 million** reduction
- Equivalent to **5.77p** per share
- Approximately **6% of NAV**



## Updated generation forecasts

- Long-term onshore wind forecast reduced by **10.1%**
- Equivalent to **4.7%** of forecast generation across the total portfolio

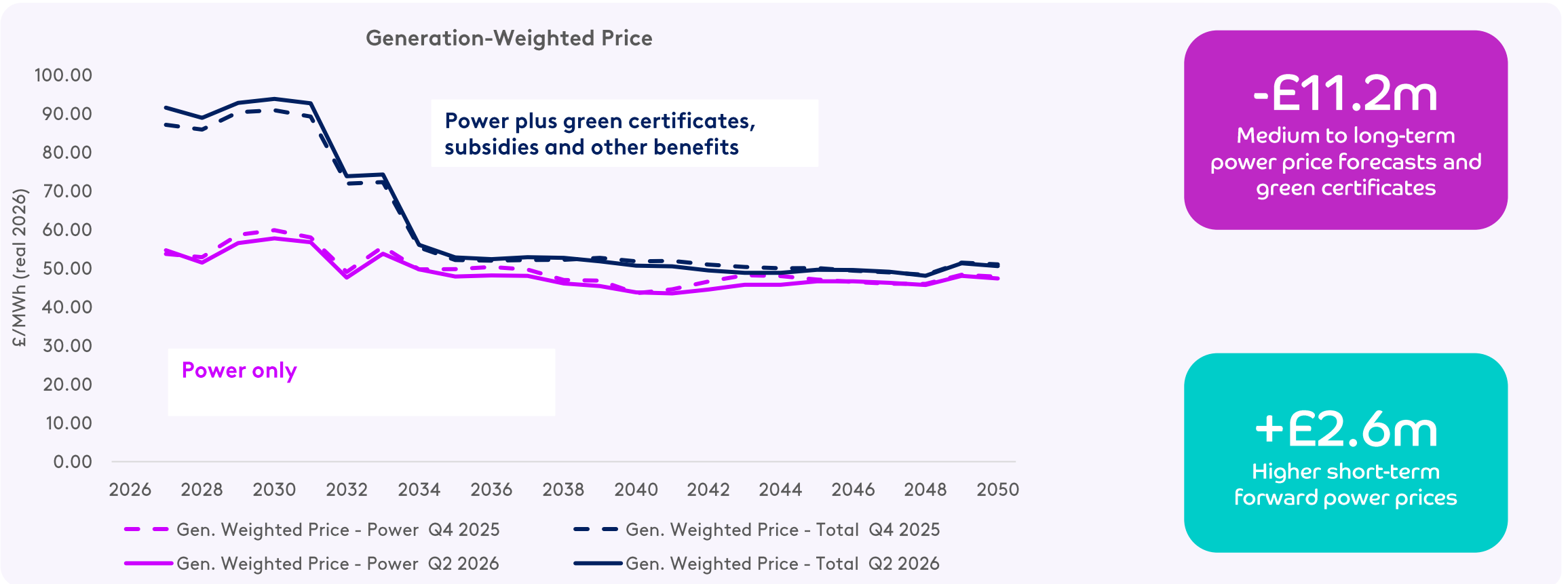


## A more robust valuation basis

- All onshore wind assets now valued using their operating histories and the latest technical evidence
- None on pre-construction forecasts

# Changes in Wholesale Energy Prices and Green Certificates

Valuation decrease of £8.6m over the period from power-price, green-certificate and capacity-market forecasts



# Adjusted Discount Rate Increased to 8.8%

Reflects alignment with prevailing market conditions and transaction evidence

|                                                                              | 30-Jun-26   | 31-Dec-25   |
|------------------------------------------------------------------------------|-------------|-------------|
| <b>Total portfolio</b>                                                       |             |             |
| Levered IRR (GBP)                                                            | 8.3%        | 7.8%        |
| <i>Levered IRR (local currency)</i>                                          | 7.8%        | 7.3%        |
| Gross Asset Value (GAV; £m)                                                  | 851.5       | 897         |
| Total Leverage %GAV (plc)                                                    | 47%         | 45%         |
|                                                                              |             |             |
| <b>Weighted average discount rate</b>                                        | <b>8.3%</b> | <b>7.8%</b> |
| (i) Return expected on the development stage assets                          | +0.4%       | +0.3%       |
| (ii) Increase in return associated with the additional leverage from the RCF | +0.1%       | +0.1%       |
| <b>Adjusted average discount rate</b>                                        | <b>8.8%</b> | <b>8.2%</b> |

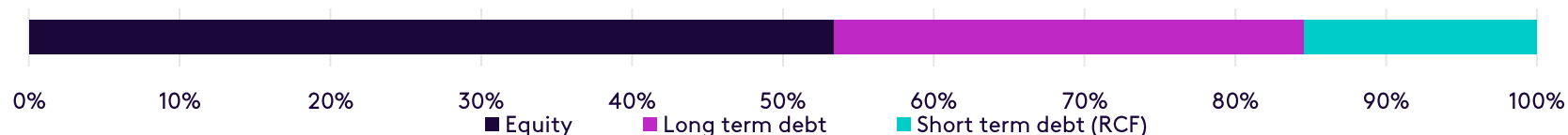
**Adjusted weighted average levered discount rate**

**8.8%**

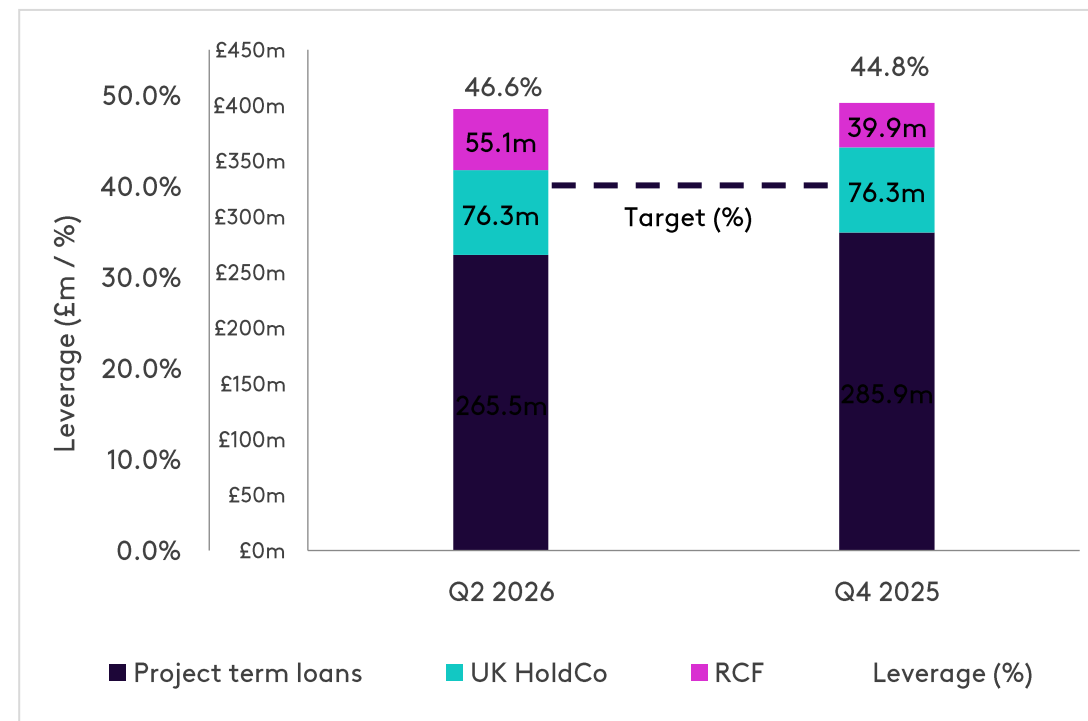
Indicative of return expected on the development stage assets, RCF impact

# Debt reduced by £5.3m but increased as a % of GAV

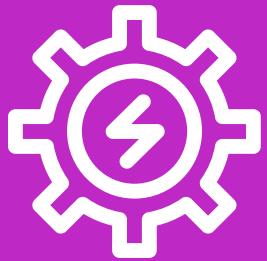
## Capital Structure at 30 June 2026



| Debt Summary (£m)      | Total Debt | RCF  | UK HoldCo Facility | Project Term Loans |
|------------------------|------------|------|--------------------|--------------------|
| Amount (£m)            | 396.8      | 55.1 | 76.3               | 265.5              |
| Debt (% GAV)           | 46.6%      | 6.5% | 9.0%               | 31.2%              |
| % Hedged               | 72%        | 0%   | 75.0%              | 85.5%              |
| Average cost of debt   | 3.5%       | 5.4% | 5.1%               | 2.5%               |
| Average remaining term | 9.3        | 2.0  | 3.8                | 12.9               |



Medium term gearing anchor remains approximately **40% of GAV**; asset-sale proceeds will principally be used to reduce gearing



# Portfolio Overview



# A Highly Diversified Portfolio of Renewable Energy Assets

Helps to reduce risk and volatility

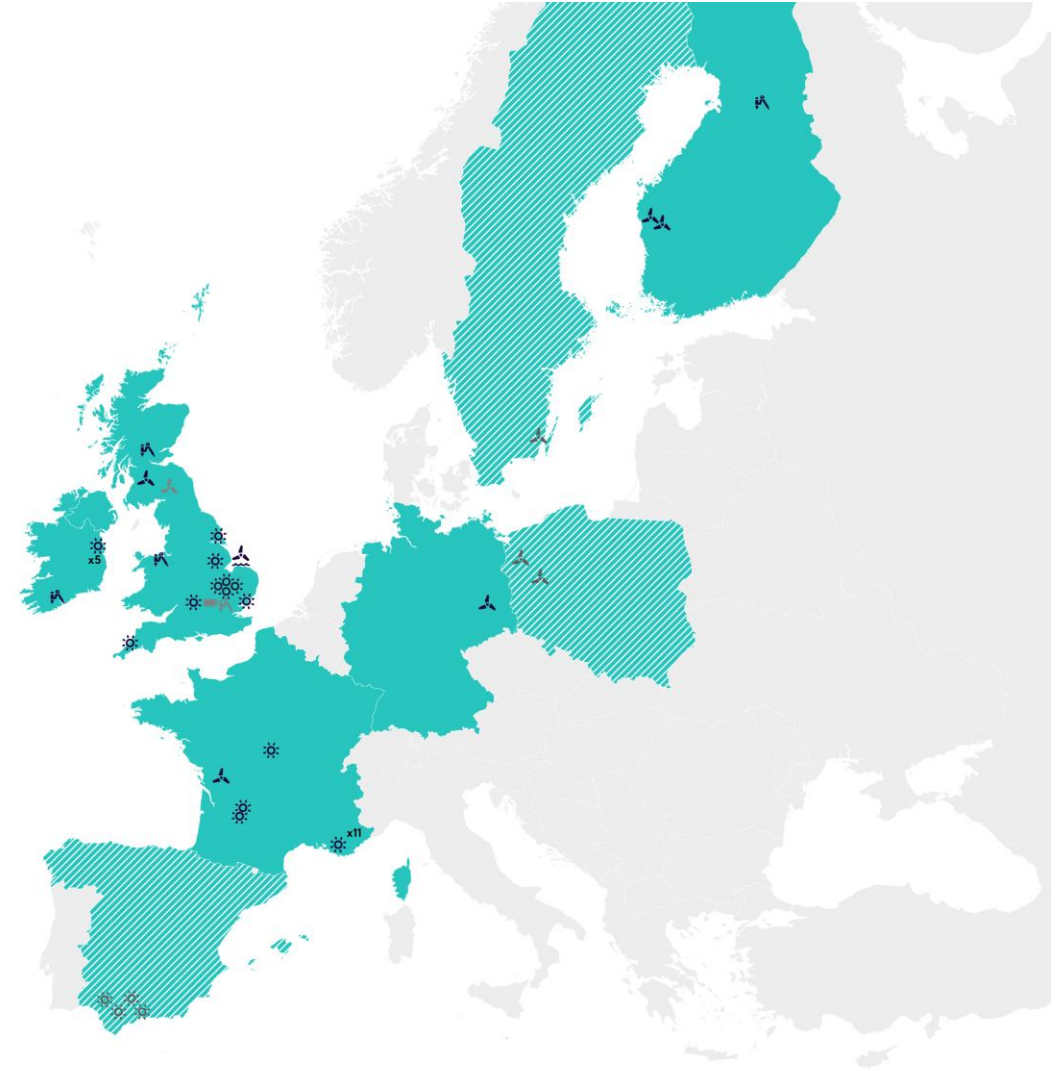
**5**  
Technologies

**740**  
Total capacity  
(MW)<sup>1</sup>

**39**  
Assets<sup>1</sup>

**5**  
Countries

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

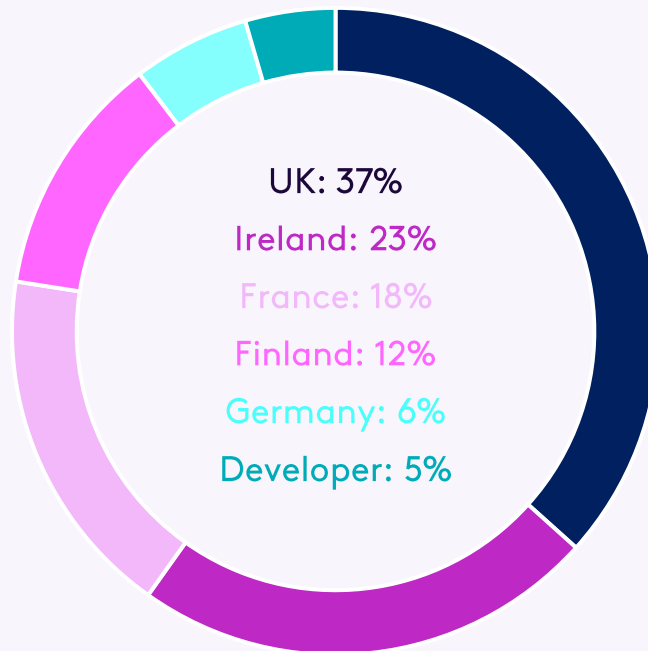


<sup>1</sup> Excludes Irish town, the sixth site within the Ballymacarney solar complex in Ireland, currently under conditional acquisition.

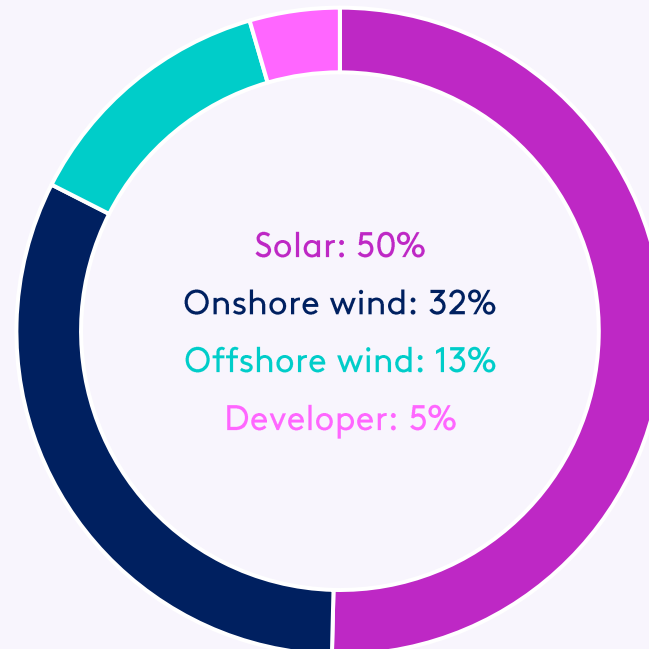
# A Well-diversified Portfolio by Country and Technology

£856m Total value of all investments<sup>1</sup>

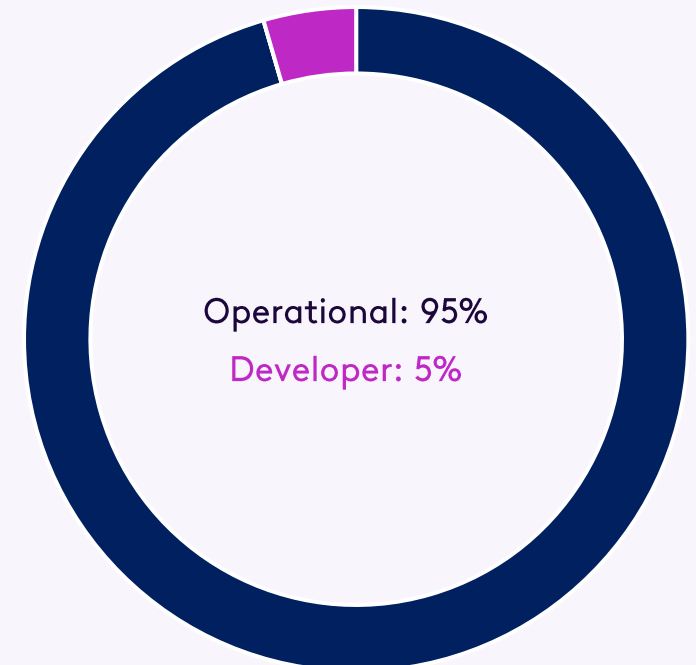
Country



Technology



Asset Phase



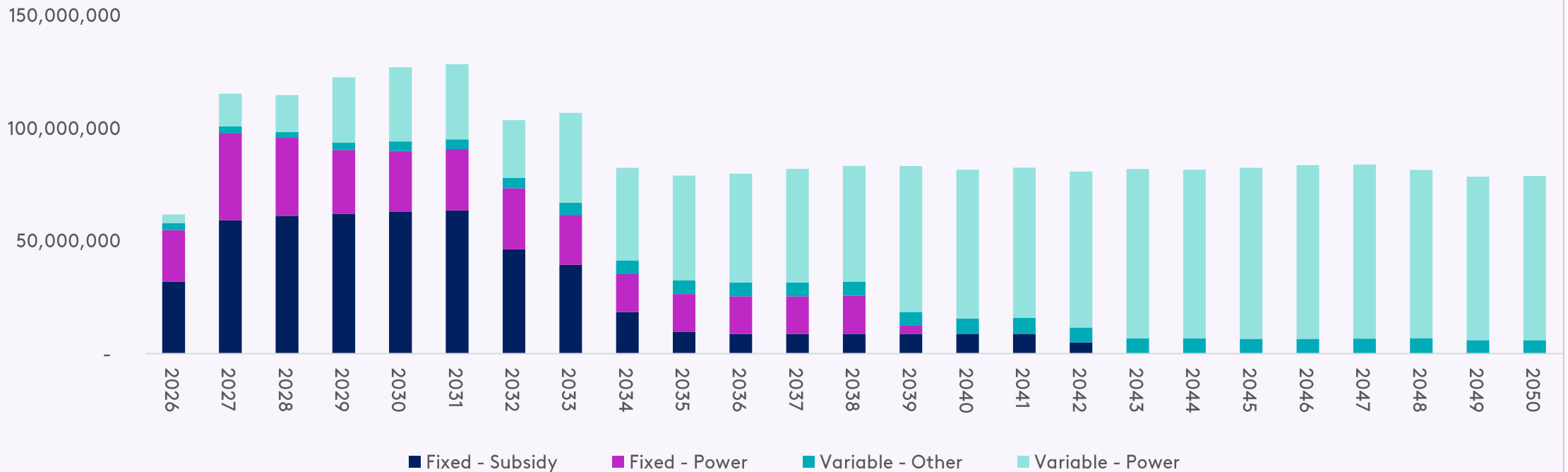
<sup>1</sup> Portfolio composition on a total value of all investments basis in line with the Company's Investment Policy as at 30 June 2026. The investments are valued on an unlevered basis and including amounts committed but not yet incurred. Sum may not add up due to rounding.

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

...and declining near-term electricity price forecasts

86% fixed revenue  
for the next two  
years

## Fixed vs Variable Revenue Split

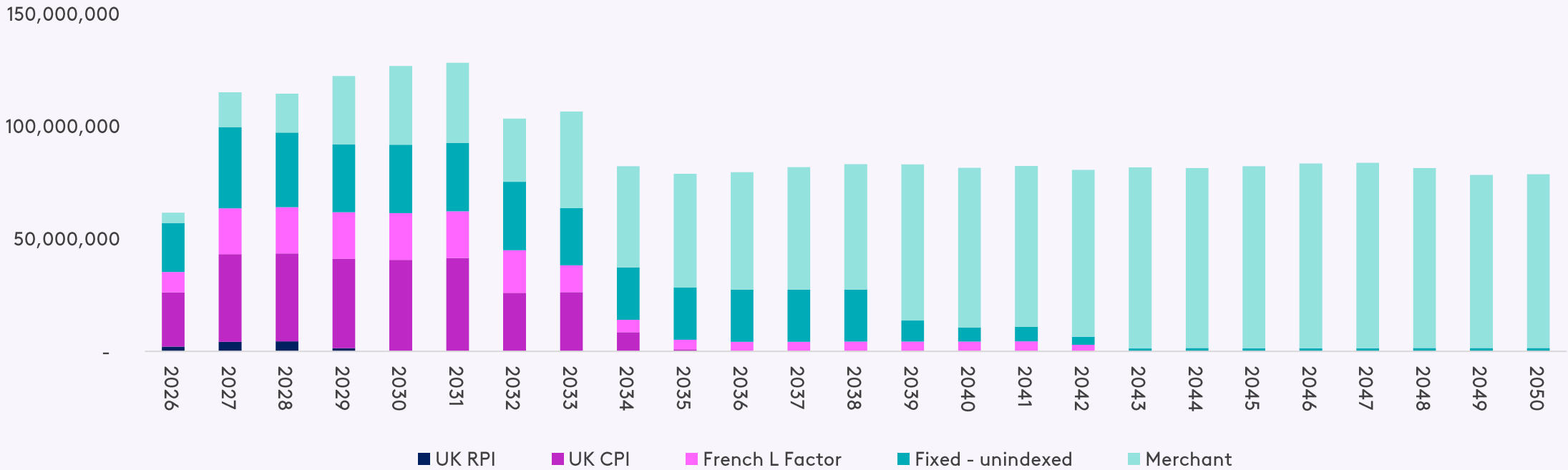


# High proportion of inflation-linked revenues

Supports progressive dividend policy

42% Inflation-linked revenues over 10-year period

Inflation Linked Revenue Split



# Active management supporting portfolio returns

Value enhancement programme underway



## Leeskow: Curtailment management

Proactive management secured compensation for an additional **1.2 GWh** in H1 2026

**95% improvement** compared with the previous approach



## Breach: Lower operating costs

Lower network tariffs secured for auxiliary electricity, applied retrospectively from January 2026

Expected to reduce FY 2026 import electricity costs by approximately **16%**



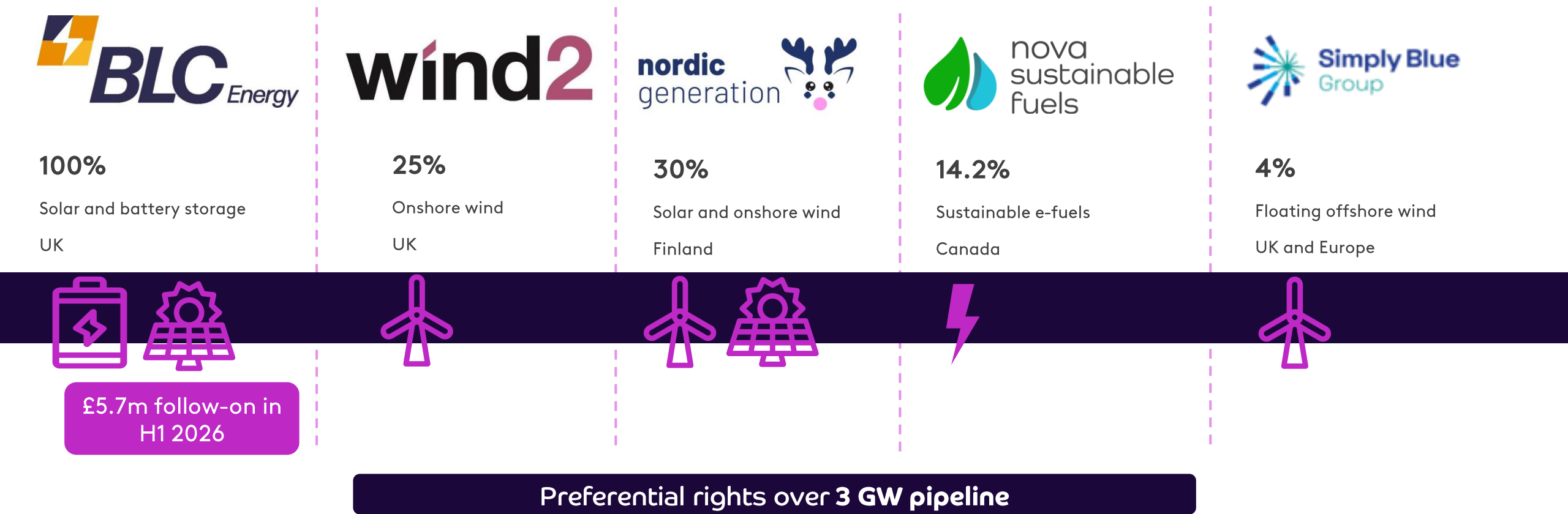
## Further portfolio opportunities

Aerodynamic upgrades and power uprates

Frequency reserve services

Battery co-location, hybridisation and repowering

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



# 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:



## Performance

Financial returns and ultimate investment success

**Article 9**

Impact Fund  
under SFDR



## Planet

Environmental considerations

**153k**

Estimated equivalent homes  
powered for a year



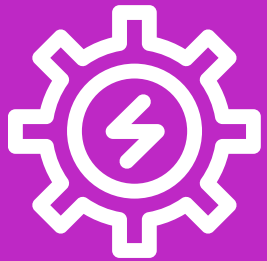
## People

Social considerations

**0.8m**

Est. equiv. new trees to avoid  
same carbon in H1 2026





# Wrap up / Conclusion



# The Case for Renewables Remains Strong

Market sentiment does not reflect underlying sector fundamentals

Renewables + storage = cheapest new electricity

Energy security continues to drive political and investment priorities

Electrification is increasing long-term power demand

Significant investment required to meet long-term demand



# ORIT 2030 – Delivery remains the priority

Progress has taken longer than expected, but conviction in the strategy remains unchanged.

Next continuation vote (June 2028)

H2 2026

## Recycle capital

Asset-sale processes underway

Proceeds principally directed towards reducing gearing

## Invest selectively

Live opportunities continue to progress

Invest only where expected returns justify the risk

Delivery and NAV impact building from 2027

## Maintain dividend resilience

FY 2026 dividend target of 6.23p, an increase of 1% YoY

Fully covered (1.38x) by operational cash flows in H1

## Longer-term growth

Construction investments expected to support NAV growth as projects become operational

2027-2030

## Acceleration of delivery

NAV growth weighted towards end of period as ORIT delivers earlier construction-stage investments into operations

Portfolio rebalanced to allow for continued dividend growth beyond end of existing subsidy lives

# Resilient portfolio, focused on delivery

We remain convinced that ORIT  
2030 is the right strategy



## A resilient operating platform

Generation broadly on budget

Revenue and EBITDA ahead of budget

Dividend fully covered at 1.38x



## A more robust valuation basis

Onshore wind assumptions updated for operating history

Valuations reflect latest operational evidence

Contracted revenues support cash-flow visibility



## Delivery is the priority

Complete further asset recycling

Reduce gearing towards the 40% anchor

Invest selectively where returns justify the risk

Deliver further operational improvements



# Q&A



# Appendices About ORIT and OEGEN



# ORIT's Differentiated Strategy Seeks to Optimise Returns

ORIT's 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 the 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-term<sup>1</sup>

## Dividend

- Announced and paid quarterly
- Progressive dividend policy
- Target is 6.23p in FY 2026<sup>1</sup>

## Typical Asset Return

- Operational assets: 6.5-8.3%<sup>2</sup>
- **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](http://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.

# Key Valuation Assumptions

Key inputs that drive ORIT's portfolio value

|                                                                                    | Country | Long-term inflation |   | Taxation |   |
|------------------------------------------------------------------------------------|---------|---------------------|---|----------|---|
|   | UK      | 2.25% <sup>1</sup>  | = | 25.0%    | = |
|   | France  | 2.0%                | = | 25.0%    | = |
|   | Ireland | 2.0%                | = | 12.5%    | = |
|   | Finland | 2.0%                | = | 18.0%    | = |
|  | Germany | 2.0%                | = | 15.8%    | = |

## Key

 Positive change to valuation assumption

= No change

 Negative change to valuation assumption

<sup>1</sup> UK RPI (annual average): 4.0% during 2026, 3.25% to 2029 and then 2.25% from 2030 onwards.

# Experienced Board of Directors

Board of Directors with on average of 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.



**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

£8.8bn  
AUM

>5.4GW  
Capacity

## ORIT Team



Chris  
Gaydon



David  
Bird

ORIT Lead Managers



Adam  
Christensen

Finance Manager



Charlotte  
Edgar

Head of IR -  
Listed



Genevieve  
Legg

Senior Portfolio  
Manager



Kat  
Siadak

Associate Director-  
Asset Management



Tom  
Woolerton

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**

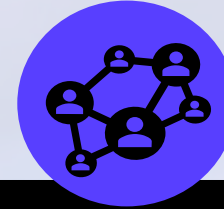
development, construction, contract, legal and operations expertise

**Engineering experts**

with decades of experience across our technologies

**Energy Markets Team**

to maximise revenue generation



## Strong origination networks

**£1.3bn p.a.<sup>1</sup>**

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, 5<sup>th</sup> Floor, 164-182 Oxford  
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## Media and Analyst Enquiries

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[octopusrenewablesinfrastructure.com](http://octopusrenewablesinfrastructure.com)

Thank  
You

