Capital Market Story

May 2024

OMV Petrom

Contents

All figures throughout this presentation refer to OMV Petrom Group (hereinafter also referred to as "the Group"), unless otherwise stated; figures are rounded, and they may not add up. The financials represent OMV Petrom Group's consolidated results prepared according to IFRS (Q1/24 financials are unaudited). The financials are expressed in RON mn and rounded to closest integer value, so minor differences may result upon reconciliation. In this presentation, Clean CCS EBIT refers to Clean CCS Operating Result.
Starting with January 1, 2022, OMV Petrom's business segments were renamed as follows: Upstream to Exploration & Production; Downstream Oil to Refining & Marketing, Downstream Gas to Gas & Power.

OMV Petrom

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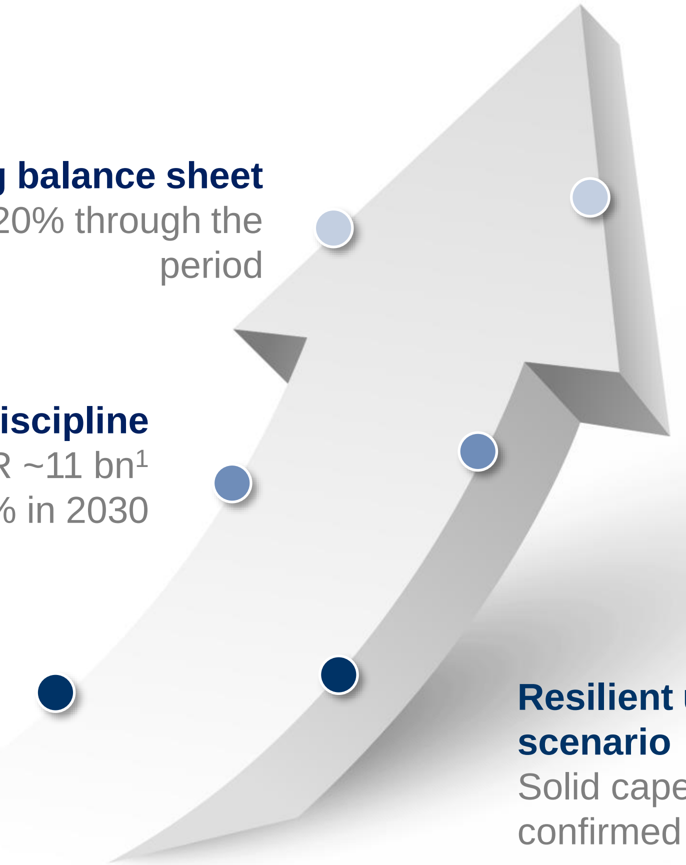
Investment proposition

OMV Petrom

OMV Petrom investment proposition

Growth, dividends and sustainability

Strong value creation



Strong balance sheet
Gearing ratio below 20% through the period

Rigorous capital discipline
CAPEX of EUR ~11 bn[1]
ROACE > 12% in 2030

Growing dividends keep up with earnings growth
5-10% p.a. growth in base dividend
Target more than double 2030 Clean CCS EBIT[2]

Reduce carbon footprint
Net zero operations by 2050

Sustainability at the core of our business
Low and zero carbon new business:
~35% of investments by 2030, of which ~EUR 2 bn for new technologies

Resilient under downside price scenario
Solid capex and profit distribution plans confirmed

[1] Cumulated over 2022-2030 period; [2] Vs. 2020; base case price assumptions (2022 – 2030): Brent oil 65-70 USD/bbl and refining margin: 5-6 USD/bbl.

Our commitment

Highly competitive dividend distribution over the strategic cycle

Dividend increase
p.a. on average

5%-10%

Special dividends

In favorable market environment, at management discretion, provided that our CAPEX plans are funded.

€

Dividends
% of operating cash flow[1]

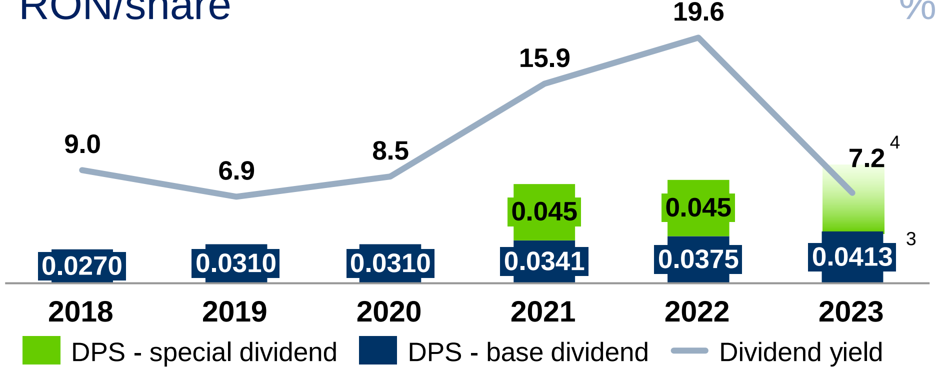
~40%

Dividend policy

Committed to deliver a competitive shareholder return throughout the business cycle, including paying a **progressive dividend**, in line with financial performance and investment needs, considering the long-term financial health of the Company.

DPS
RON/share

Dividend yield[2]
%

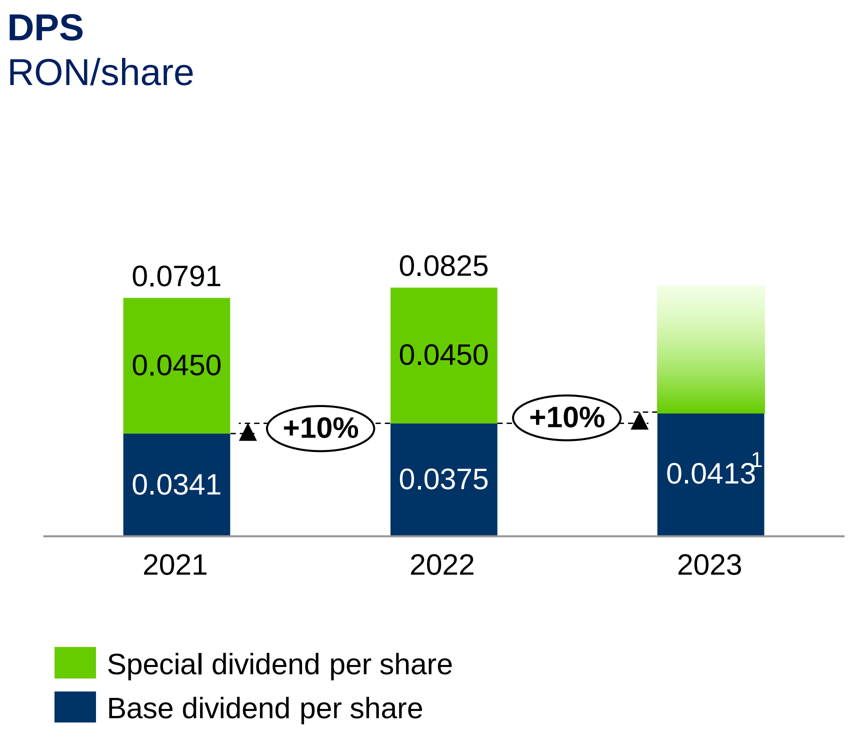


[1] *Base case price assumptions (2022-2030): Brent oil: 65-70 USD/bbl and refining margin: 5-6 USD/bbl; weight calculated as total dividends per cumulative operating cash flows for 2022-2030;* [2] *Calculated based on the closing share price (unadjusted) as of the last trading day of the respective year;* [3] *Base dividend only, intention to propose special dividends in 2024;* [4] *Calculated using base dividend only*

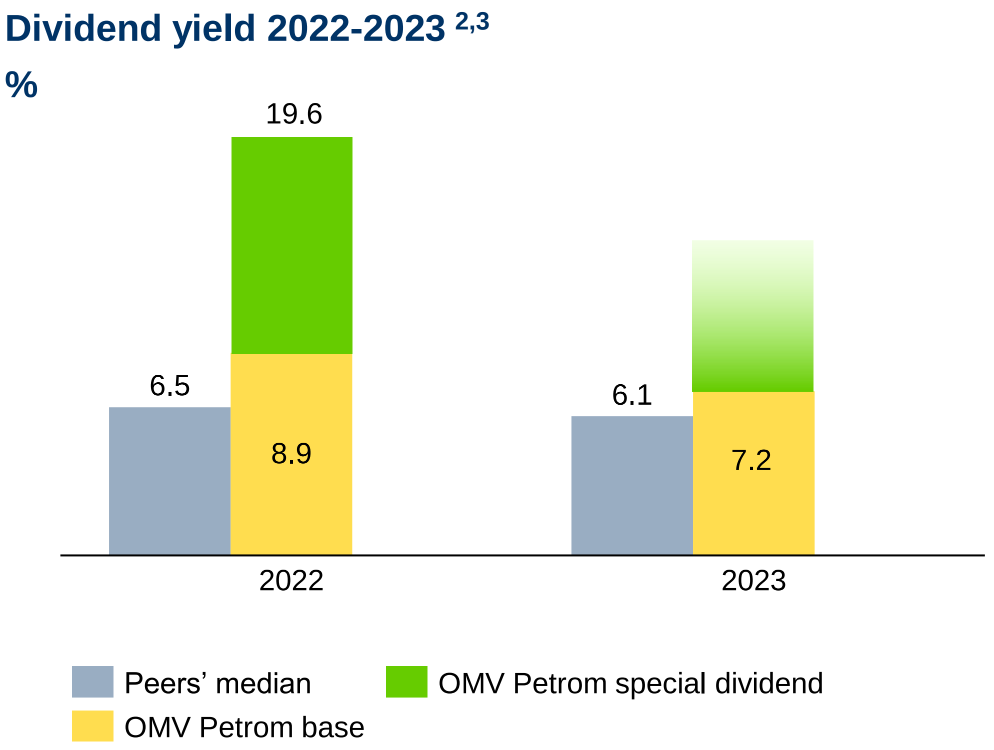
Base dividend for 2023

Base dividend up 10% yoy, special dividend to be announced

Progressive base dividends

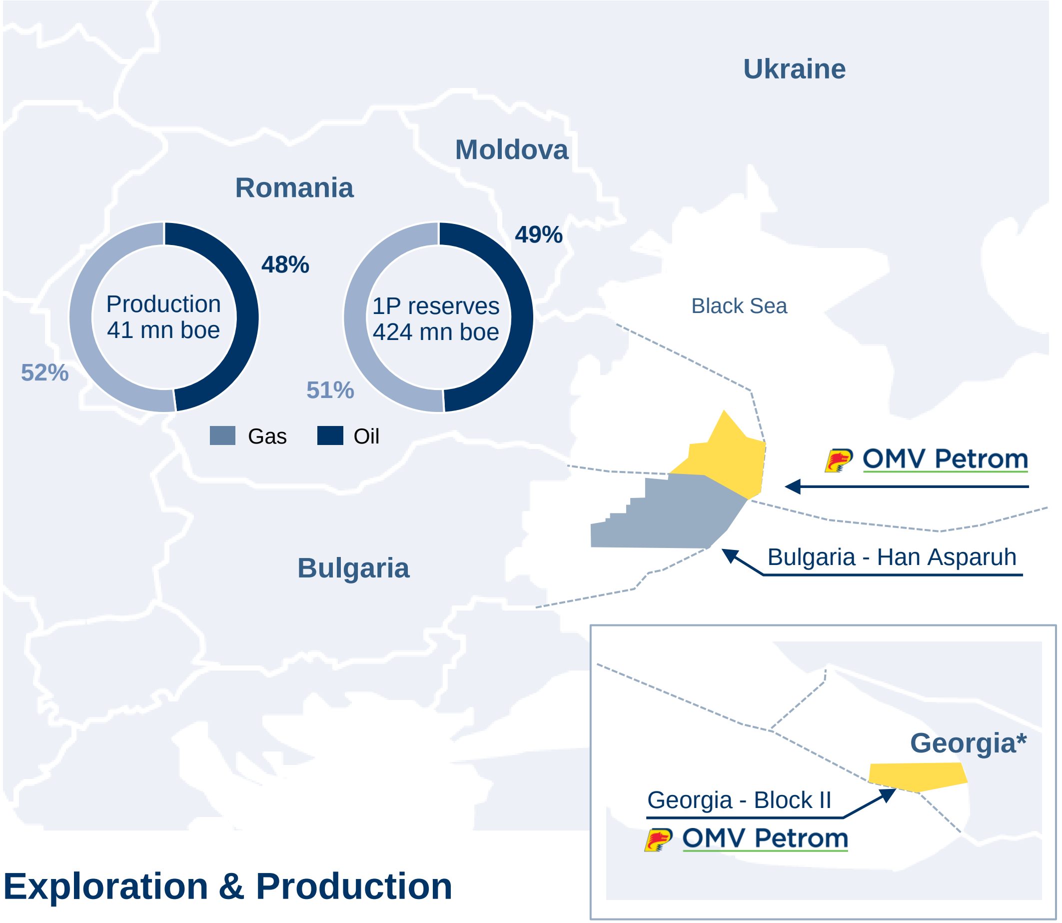


Competitive among our peers



[1] *Base dividend only, intention to propose a special dividend in 2024;* [2] *OMV Petrom DY calculated based on the closing share price as of the last trading day of the respective year;* [3] *Dividends distributed for fiscal years 2022-2023; Peers' median does not include buy backs, and refers to Shell, BP, TotalEnergies, Equinor, Repsol, Galp Energia, Neste Oil, Eni, Orlen, MOL and Tupras.*

Largest integrated energy company in South-Eastern Europe



Exploration & Production

Refining & Marketing

- Petrobrazi refinery, 4.5 mn t/yr capacity
- 780 filling stations, operated via two brands: Petrom and OMV
- 5.5 mn t total refined product sales (thereof 3.1 mn t retail sales)

Gas & Power

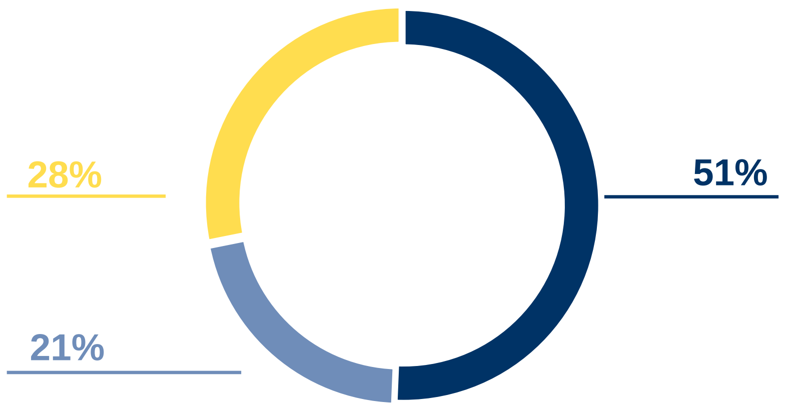
- Brazi gas-fired power plant (capacity 860 MW); net electrical output: 4.2 TWh
- Gas sales 4.4 bcm (46.8 TWh)

All data refers to 2023
** Country exit decision announced in April 2024*

In top 3 of BSE listed company by market capitalization

OMV Petrom S.A. shareholder structure[1]

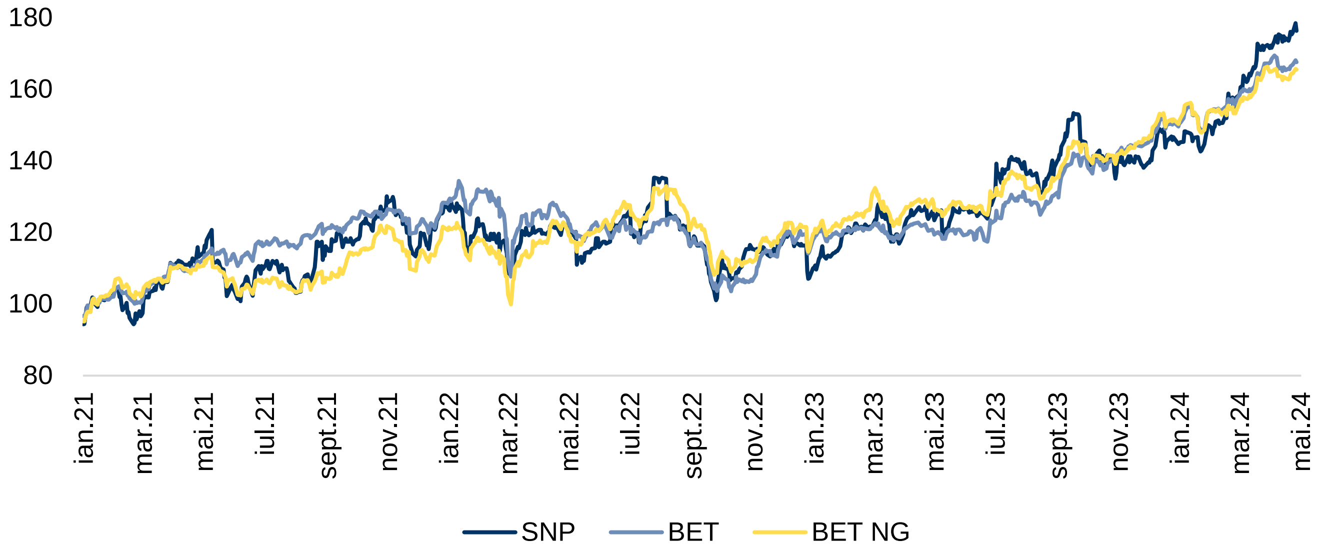
%



- **OMV**[2]: Austria's leading integrated international oil and gas company
- **Romanian State**, no special rights attached
- **Others**[3]: 28.15%

Share price performance[4]

Index Jan 2021 = 100



Share information

Symbol on the Bucharest Stock Exchange (BSE)	SNP
Ordinary shares	62,311,667,058

[1] As of April 30, 2024; [2] Shareholder since December 2004; [3] Premium tier on the Bucharest Stock Exchange; [4] Rebased quotations on the Bucharest Stock Exchange; unadjusted

Strategy 2030:

Transforming for a lower carbon future

OMV Petrom

OMV Petrom Strategy 2030

Transforming for a lower carbon future

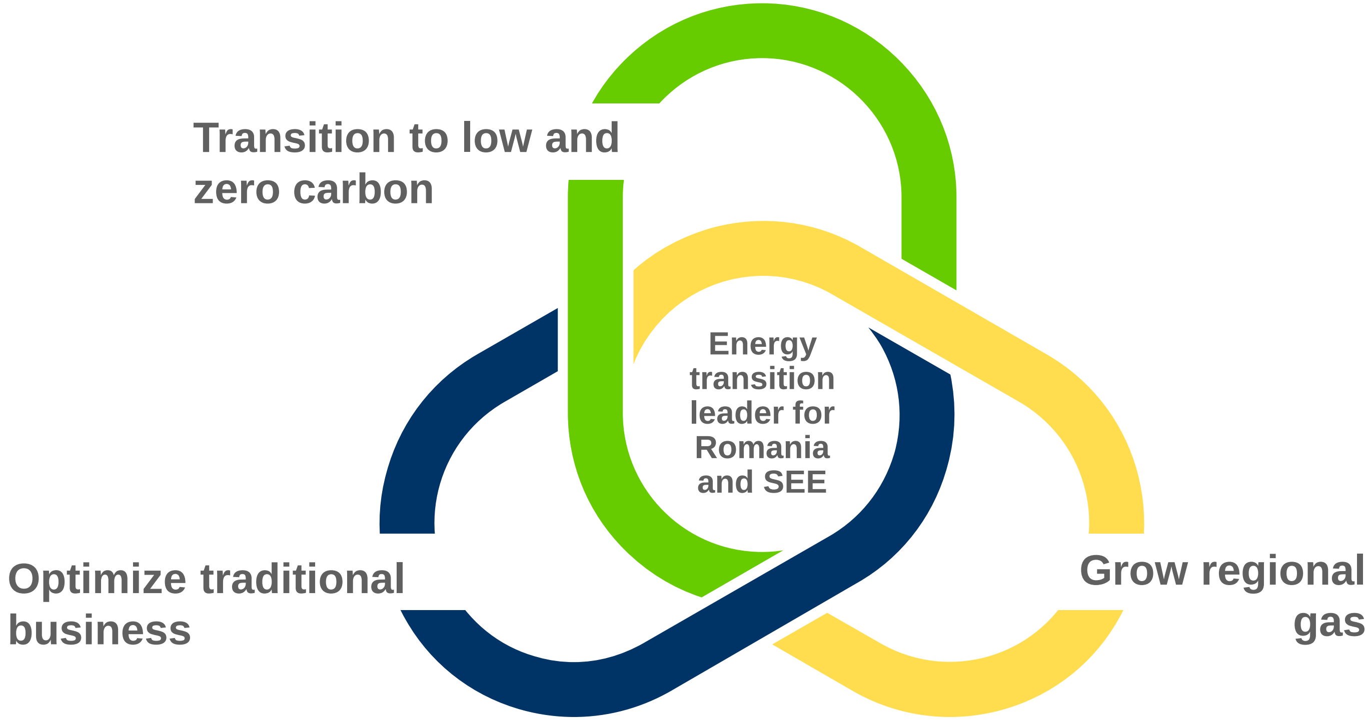
- **We will lead the energy transition in South-East Europe,** capitalizing on emerging market opportunities
- **Romania is among the fastest growing economies in Europe,** driving increasing energy demand
- OMV Petrom is well placed to meet this demand with **lower carbon Black Sea gas** and significant investment in **renewable power, biofuels, alternative mobility and new technologies**
- We are committed to achieve **Net Zero operations by 2050**
- By 2030, **we will reduce the carbon emissions of our operations by ~30%[1],** gas will make up 70% of our hydrocarbon production, **~35% of our capex will shift to low and zero carbon business**
- Combined with **a disciplined approach to capital allocation**, we will generate **significant free cash flow with strong growth in profits** – supporting our investments across the business and delivering strong returns for shareholders through the decade
- **We maintain a relentless focus on our stakeholders:** employees, communities, customers, shareholders

[1] Scope 1 and 2 emissions; reduction vs 2019

OMV Petrom Strategy 2030

Transforming for a lower carbon future

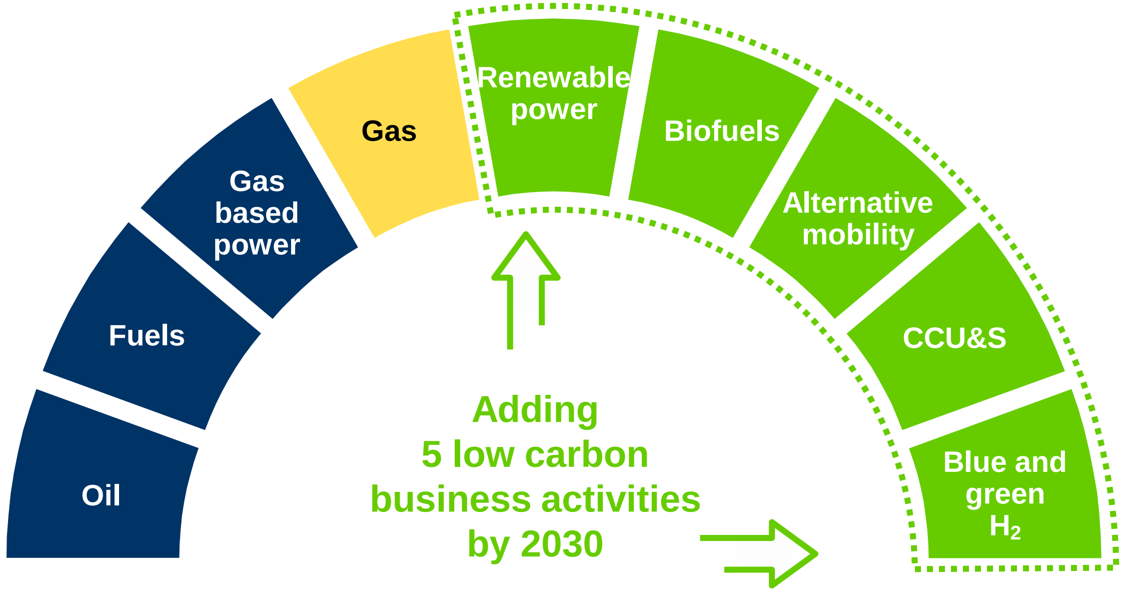
Strong capital discipline & dividend policy



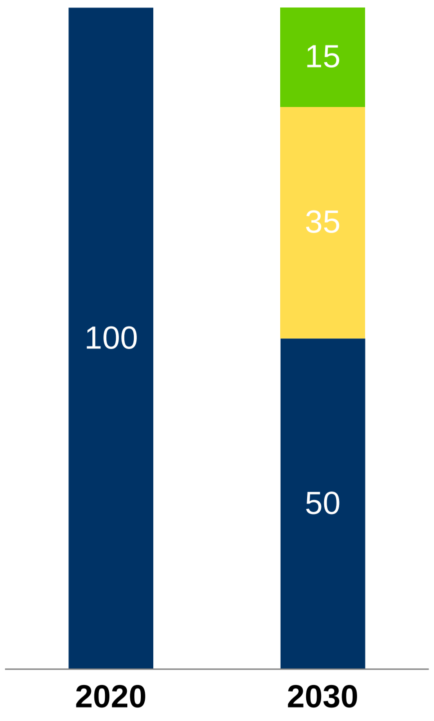
Innovation & Digitalization | People & Communities | Responsible operations

Building a diversified, integrated energy transition business

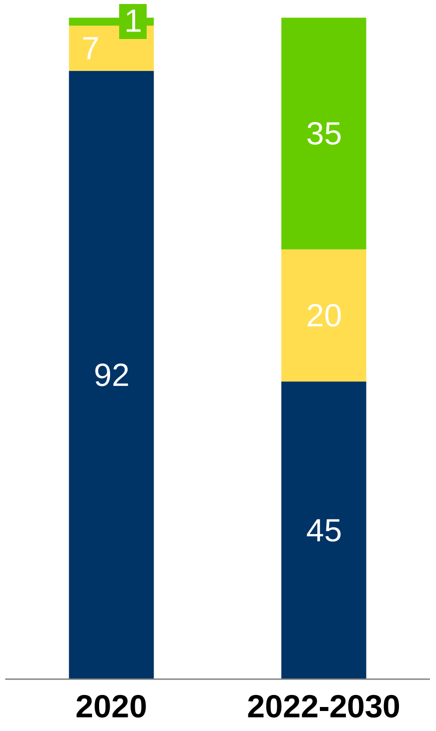
OMV Petrom portfolio 2030



Clean CCS EBIT
%



CAPEX
%



Low and zero carbon | Regional gas | Traditional business

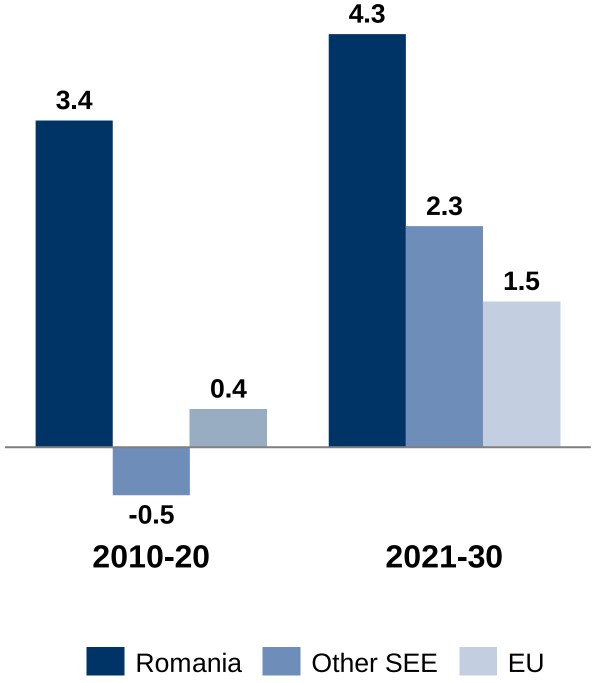
Strategy 2030:
Transforming for a lower carbon future

OMV Petrom

Romania is one of Europe’s fastest growing economies

European energy environment is going through significant transformation

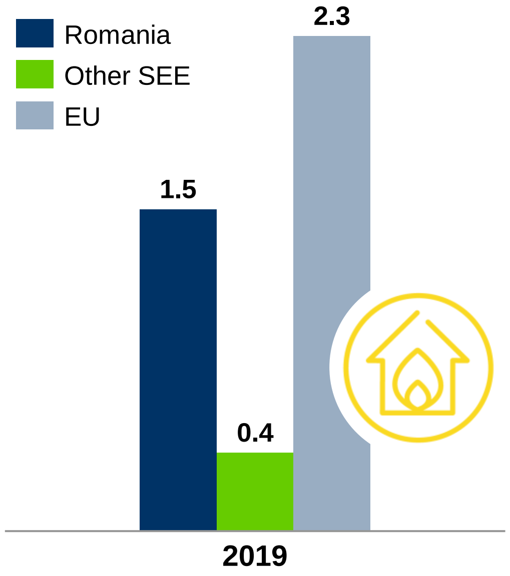
Romanian GDP per capita set to grow[1] CAGR, %



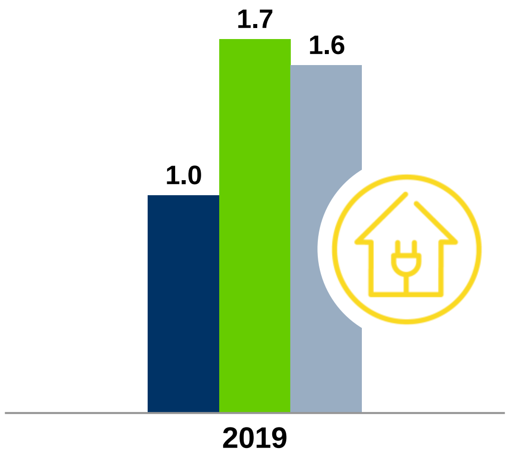
[1] Source: EU Fit for 55 program; Eurostat, the IMF and internal estimates; Other SEE excludes Romania but includes: Bulgaria, Serbia, Cyprus and Greece

Strong growth estimated for Romania to 2030

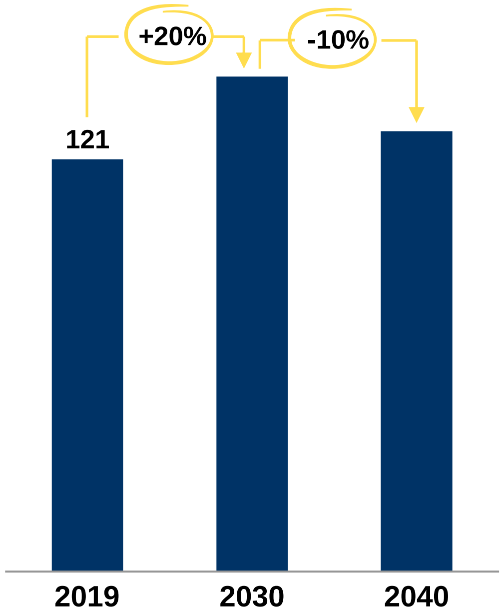
Gas - household consumption[1]
MWh per capita



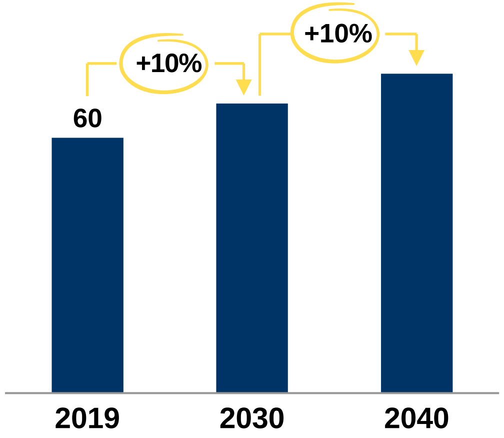
Power - household consumption[1]
MWh per capita



Gas demand Romania[2]
TWh



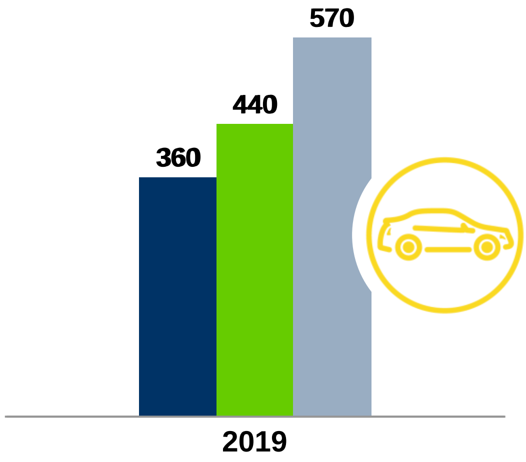
Power demand Romania[2]
TWh



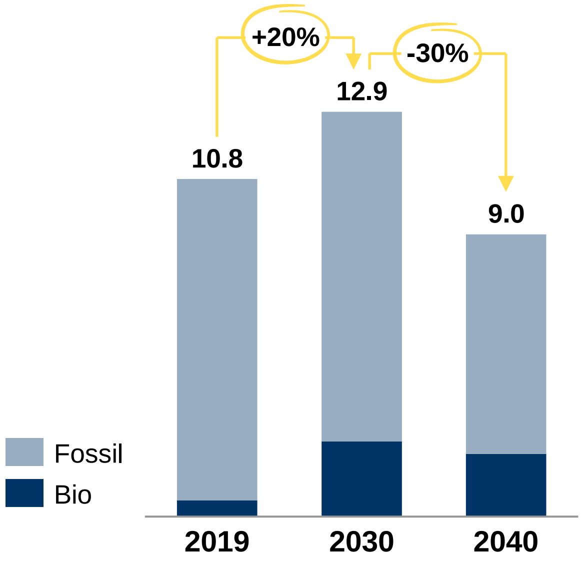
[1] *Other SEE excludes Romania but includes: Bulgaria, Serbia, Cyprus and Greece; Source: Eurostat;*
[2] *2019 gas and power demand statistics based on ANRE/Transelectrica official data; gas and power estimates based on internal data and forecasts*

Economic growth and rising living standards drive growth to 2030

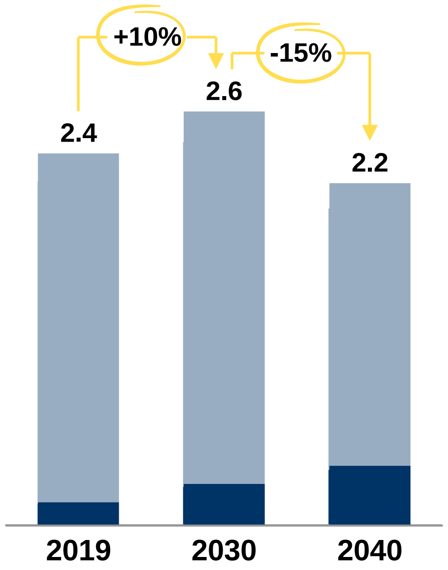
Motorization rate[1]
cars/1000 inhabitants



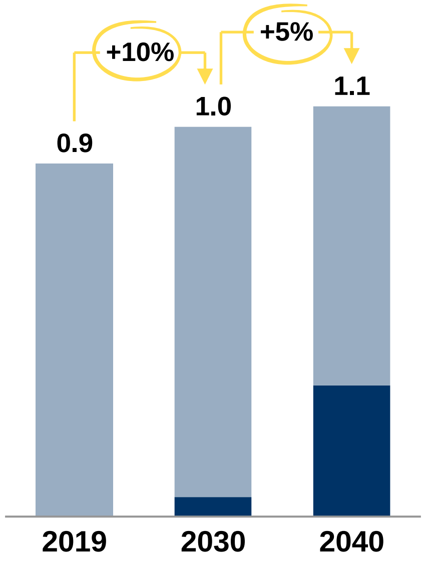
Diesel demand[2,3]
mn t



Gasoline demand[2,3]
mn t



Jet demand[2,3]
mn t



Biofuels content[4]	2019	2040
Diesel	5%	22%
Gasoline	6%	17%
Jet	0%	32%

[1] Source: Motorization rate: ACEA – European Automobile Manufacturers Association; Other SEE excludes Romania but includes: Bulgaria, Serbia, Cyprus and Greece; [2] Energy demand: OMV Petrom internal data and forecasts; Data refer to OMV Petrom operating region which includes Romania, Bulgaria, Moldova, and Serbia; [3] Scaling of the bar charts is not equal; [4] Internal estimates

Strategy 2030:

Transforming for a lower carbon future

Decarbonization strategy

Key directions

Decarbonize current operations

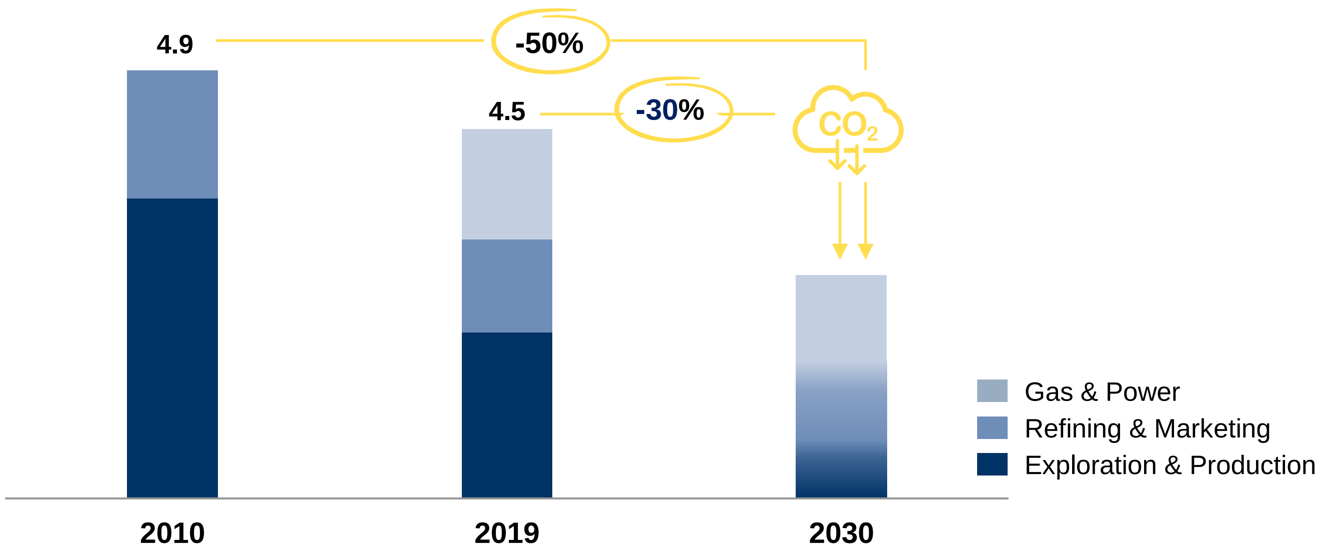
Expand lower carbon gas business

Pursue new low and zero carbon business opportunities

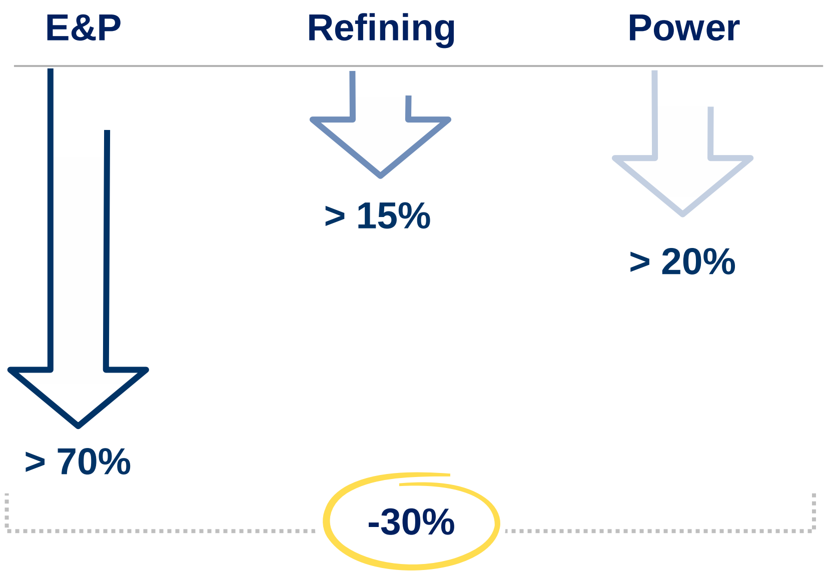
Decarbonization strategy

Paving the way to Net Zero operations in 2050

Scope 1 – 2[1] emissions
mn t CO_2 eq



Scope 1 – 2 carbon intensity[2]
reduction %



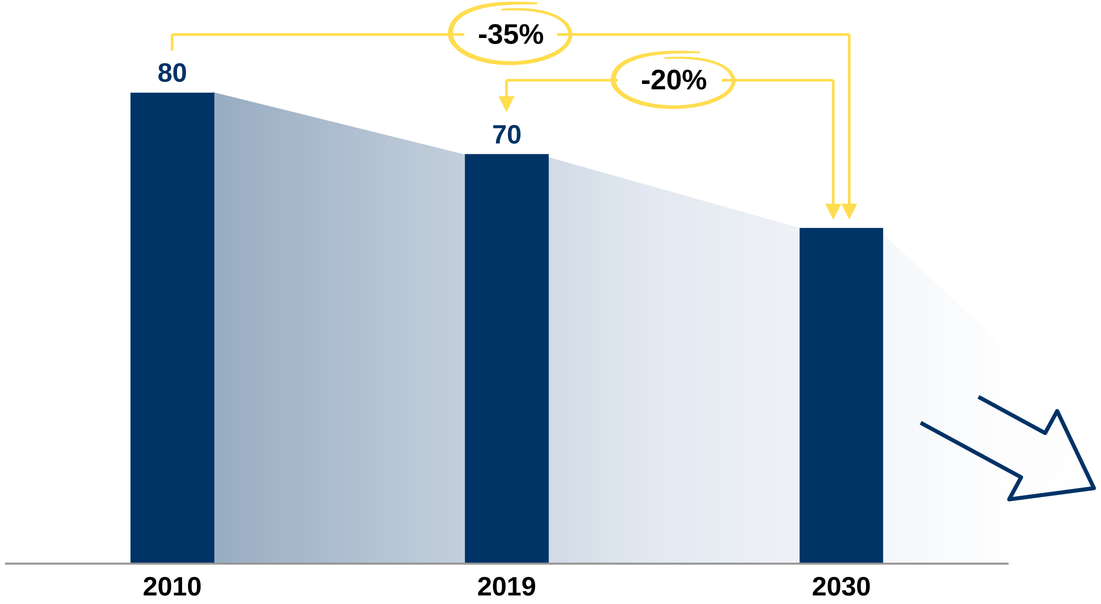
Actions aimed at reducing Scope 1 & 2 by 2030

- **Achieve less than 0.2% methane intensity**
- Detect and **reduce fugitive emissions** in E&P and R&M
- Phase out existing and **no new projects with routine flaring and venting**
- **Portfolio optimization** in E&P
- **Produce electricity from associated gases or thermal energy and generate renewable power** for own consumption

[1] Scope 1 = direct emissions from operations that are majority-owned or controlled by the organization; Scope 2 = indirect GHG emissions associated with the purchase of electricity, steam, heat etc.; [2] Vs. 2019

Carbon intensity of energy supply to drop ~20% by 2030

Scope 1 – 3 Net carbon intensity of energy supply
g CO_2 eq/MJ



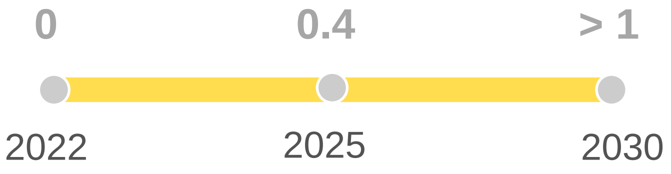
- **~20% reduction in Scope 1-3 carbon emissions**[1]
- **EU Taxonomy eligible CAPEX** to reach 35%[2]
- **Lower and zero carbon energy** for customers, to account for ~**60% in total products sold in 2030**

Focused actions to decrease emissions

- **Increased equity gas sales**, the cleanest fossil fuel
- **New technologies (mainly CCU&S and H_2)**
- **Carbon offsetting measures**
- **Selective presence into the most profitable sales channels**

[1] 2030 vs 2019; Carbon intensity of energy supply = Total emissions (all Scope 1 + all Scope 2 + all Scope 3 for energy products only) / Energy Supply; [2] By 2030

Romania's solar potential to enable renewable power portfolio

Renewable power	Opportunities	OMV Petrom target total capacity, including partnerships, GW
Photovoltaic	► Romania: the highest solar potential in the region ► > 10% contribution to the 2030 total estimated solar capacities in Romania[1] ► Build on our 10-year experience in the power market ► Opportunity to offer green electricity to our customers and long-term power purchase agreements (PPAs) ► Optimization of balancing services based on the integration with Brazi power plant	

[1] *7.4 GW estimated total solar capacities in 2030 in Romania by the European Commission, Policy scenario for delivering the European Green Deal, MIX scenario (MIX scenario - relies on both carbon price signal extension to road transport and buildings and intensification of energy and transport policies)*

Biofuels to exceed 15% in our total fuel production in 2030

Biofuel	Opportunities	OMV Petrom target capacity, kt/year
Advanced ethanol: Cellulosic ethanol from straws	▶ Romania: unique combination of straw availability and cost ▶ Upgrading agricultural residues with potential for carbon-negative ethanol when combined with CCS ▶ Ethanol[1] expected to grow as a blend in gasoline, optional feed for SAF[2] and green petrochemicals	0 (2022) – 150 (2030)
Sustainable aviation fuel and renewable diesel: SAF/HVO[1]	▶ Romania: strong agriculture sector and opportunity to upgrade agricultural products waste to high value SAF/HVO[2] ▶ Flexibility between SAF or HVO ▶ Best option can be ensured based on aviation fuel/diesel market evolution	0 (2022) – 450 (2030)

[1] The only uncapped biofuel; [2] SAF/HVO: sustainable aviation fuel (bio jet) and hydrotreated vegetable oil

Well positioned to capture opportunities

Future mobility: new energy mix

Electro Mobility

Grow e-mobility offer and become the preferred partner for electric fleets

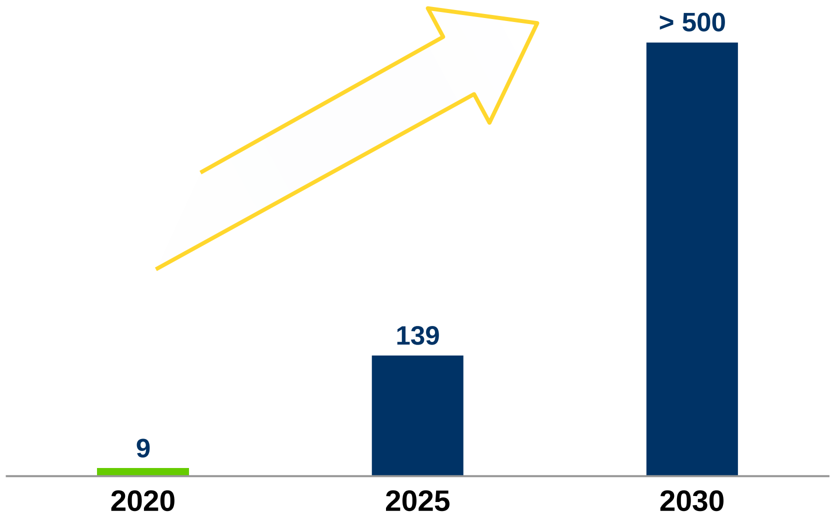
H_2 mobility

Active contribution to the development of H2 mobility - solution to decarbonize heavy duty transport

Gas Mobility

Position for regional LNG mobility leadership and value driven CNG investments. Leverage on our proven concept of integration to generate growth in gas mobility

Charging points with alternative fuels



Unique opportunities beyond renewables, sustainable fuels, mobility

- Romania: significant on- & offshore long-term CO_2 storage potential to be evaluated
- OMV Petrom holds in-depth knowledge of geological structures
- Potential partnering with hard-to-abate industries
- Evaluate CO_2 capture and storage demonstration project
- Test CO_2 capture and utilization technology in Petrobrazi refinery

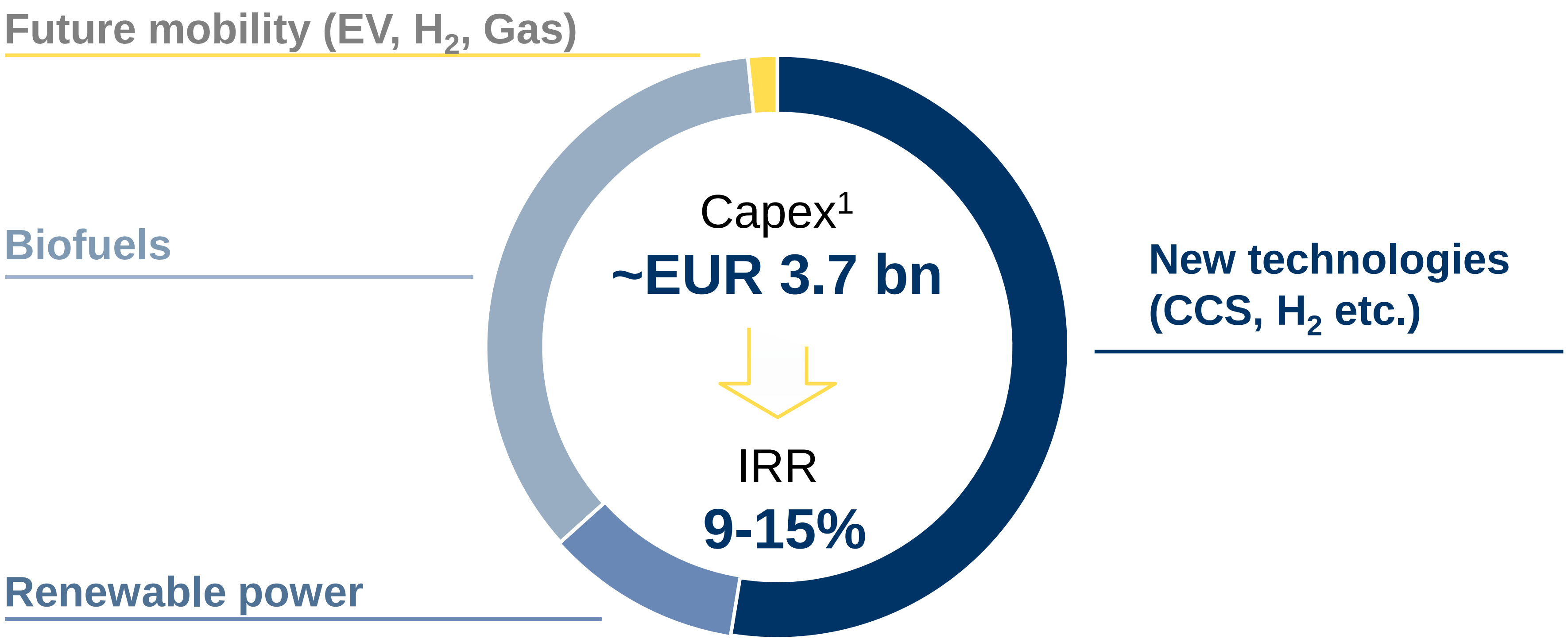
- Romania: gas production and renewable energy availability - opportunity for blue and green H_2 production
- OMV Petrom to become an integrated H_2 player, long term
- H_2 to decarbonize own operations, other industries, used as feedstock and fuel in mobility
- Invest in green and blue H_2 production technologies
- Test new technologies, such as methane pyrolysis

OMV Petrom targets – CCS and H_2

2022-2025: Technical feasibility, commercial evaluation, and assessment of partnerships opportunities

Development and implementation

Generating attractive return



[1] *Projects selection and prioritization will be based on risk and return assessments, including regulatory developments, that might end up in different allocation between technologies, within the ~EUR 3.7 bn capex plan*

Strategy 2030:

Transforming for a lower carbon future

OMV Petrom

A growth project for OMV Petrom and Romania

Robust economics to support OMV Petrom's transformation and dividend policy

Delivering on Strategy 2030

Ensure Romania's security of supply

~50% increase in OMV Petrom 2030 EBIT

Gas production will double and account for **~70% of total hydrocarbon volumes**

Romania will become the **EU largest gas producer and a net exporter**

Key highlights

Neptun Deep – a transformational project

Project view: 100% interest

- Final investment decision: **June 2023**
- First Gas: **2027**
- Production at plateau [1]: **~140** kboe/d
- Production cost [2]: **~3** USD/boe
- Estimated recoverable volumes [3]: **~100** bcm
- Development CAPEX: **3.8 - 4.0** EUR bn
- IRR [4] LoF: **>12%**

[1] Or ~21 mn cbm/day; [2] Average for the life of field, does not include royalties, supplemental taxes, depreciation etc; [3] Or ~700 mn boe; [4] OMV Petrom's perspective, life of field

Timeline

Our journey to the Development phase

2008
JV with XOM signed

2009
First 3D seismic acquisition campaign

2011-12
First drilling campaign

Domino 1 first discovery

2012-13
Second 3D seismic acquisition campaign

2014-15
Second drilling campaign

Pelican South discovery

August 2022
OMV Petrom operator with 50%; 50% Romgaz

Q1 2023
Tuzla-Podisor capacity booking signed with Transgaz

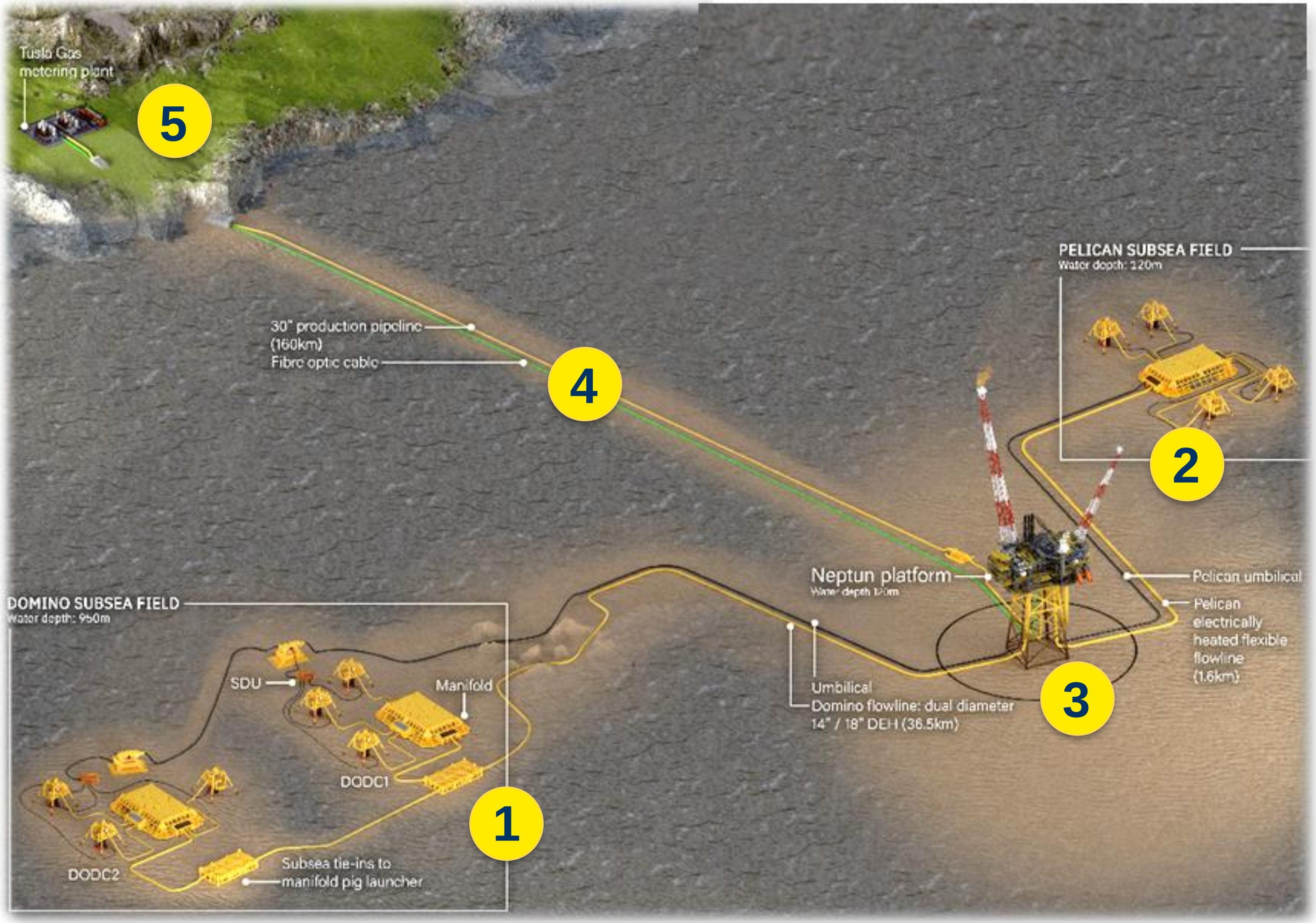
2023
June: Final investment decision

August: Field development plan endorsement

December: >80% contracts awarded

Block area

Development concept to bring novelties



- **Zero harm policy**
- **Deploy innovative solutions**

1

Domino reservoir

- **~1,000 m water depth**
- Will produce via **two subsea drill centers** from **6 wells**

2

Pelican South reservoir

- **~120 m water depth**
- Will produce via **one subsea drill center** from **4 wells**

3 Unmanned shallow water platform

4 Pipeline of 160 km to the metering station

5 Onshore Natural Gas Metering Station

Project team

Leveraging our experience while adding new capabilities

Shallow offshore
- Gas fields operator for more than four decades
- Shallow offshore currently at ~25% of total gas production

Onshore facilities
- Built and operating Romania’s largest hydrocarbon treatment plants
- Operating ~10,000 km onshore pipelines with high operational uptime

Deep water mega project management skills
- International capabilities with strong experience in global deep-water projects
- Knowledge transfer from OMV Group

Gas commercial experience
- Experience on the entire gas value chain
- Major Romanian gas supplier in the last two decades
- Important regional player with market access and expertise

Sub-surface
- Unparalleled knowledge of Neptun Deep field
- Partner in eight deepwater wells drilled

Neptun Deep gas to have access to Romania and other potential gas markets

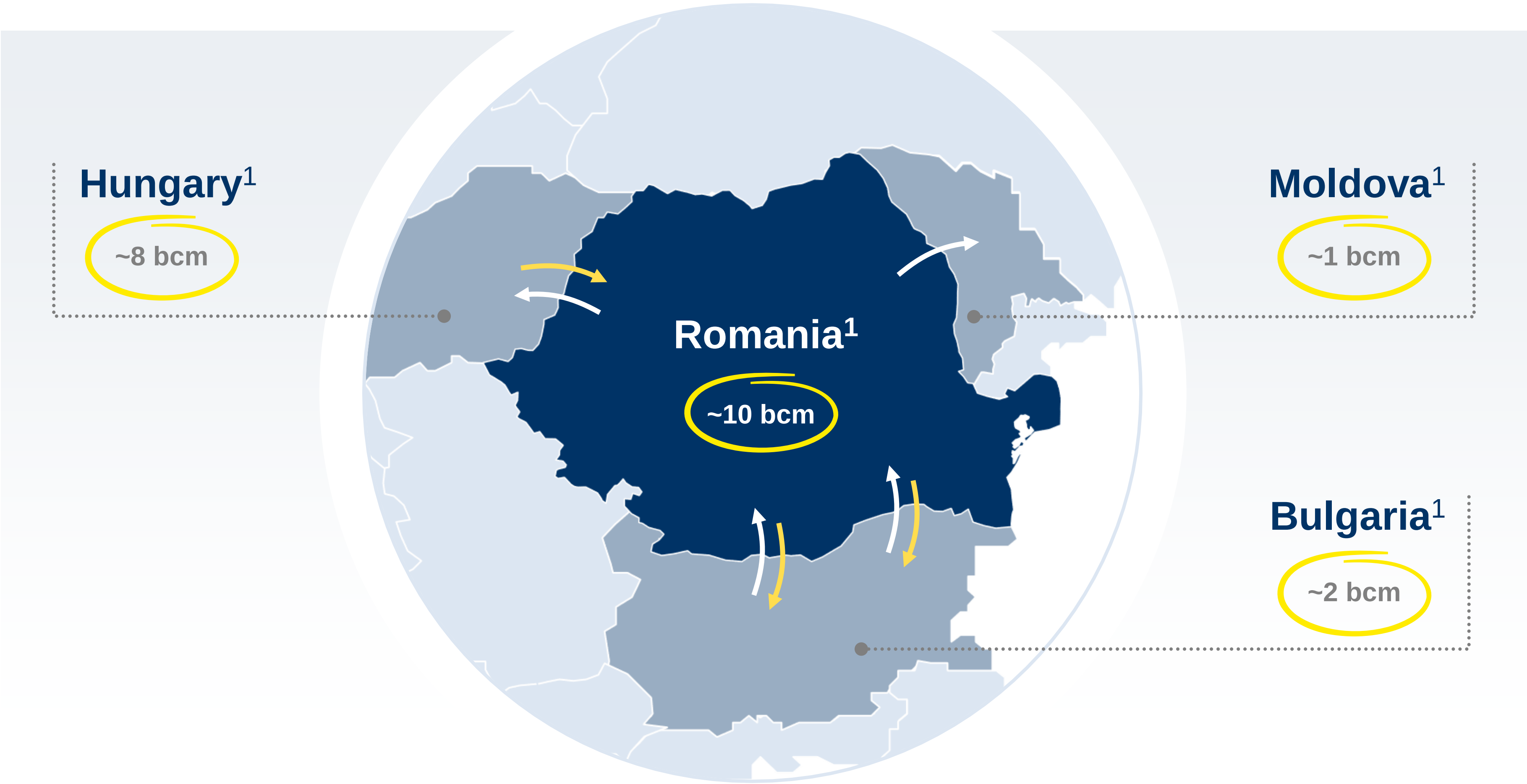
EU [1]

~315 bcm

Market demand 2023

Interconnecting

Capacities in place



[1] *Net importer*

Neptun Deep

A game-changer for OMV Petrom and Romania

Significantly **boosts our hydrocarbon production** and **shifts gas weight** to 70% from current 50%

Generates **strong growth in profits** to support investments in low and zero carbon business and shareholder returns

Improves carbon competitiveness of our upstream portfolio as it will significantly contribute to the 70% reduction target of the Scope 1-2 carbon intensity [1] also **supporting our Net Zero operations commitment by 2050**

Drives superior value through **integrated gas and power business**

Increases Romania's and region's long-term security of supply while contributing to a **low carbon economy**

Brings **significant benefits for Romania** [2]:

- **~EUR 20 bn** expected budget revenues
- **~9,000** new and maintained jobs
- **~EUR 40 bn** economic added value

[1] by 2030 vs 2019; [2] based on an independent study ordered by OMV Petrom; direct, indirect and induced effects

Build additional opportunities

New offshore exploration wells	2 - 4 By 2030
Exploration expenditures EUR mn	~30 Annual average 2022-2030

Bulgaria – Han Asparuh

- OMV Petrom took over operatorship
- Status: 5,000 km^2 3D seismic data processing
- Continue exploration activity

Georgia – Block II

- OMV Petrom (100%)
- Production sharing contract signed in March 2021
- Status: country exit decision taken

Explore other opportunities

Strategy 2030:

Transforming for a lower carbon future

OMV Petrom

Maximize potential of current E&P assets

Value over volume

- Maximize economic recovery:
  - > 400 workovers p.a.
  - > 60 wells to be drilled p.a.
- Advanced technologies to enhance recovery rates by 5-10%[1]
- 5% decline rate per year, by 2025, excluding divestment[2]

Strict cost management

- Enhance competitiveness through cost optimization
- Streamline footprint and reduce complexity
- Modernize and automate > 95% of facilities and wells[3]

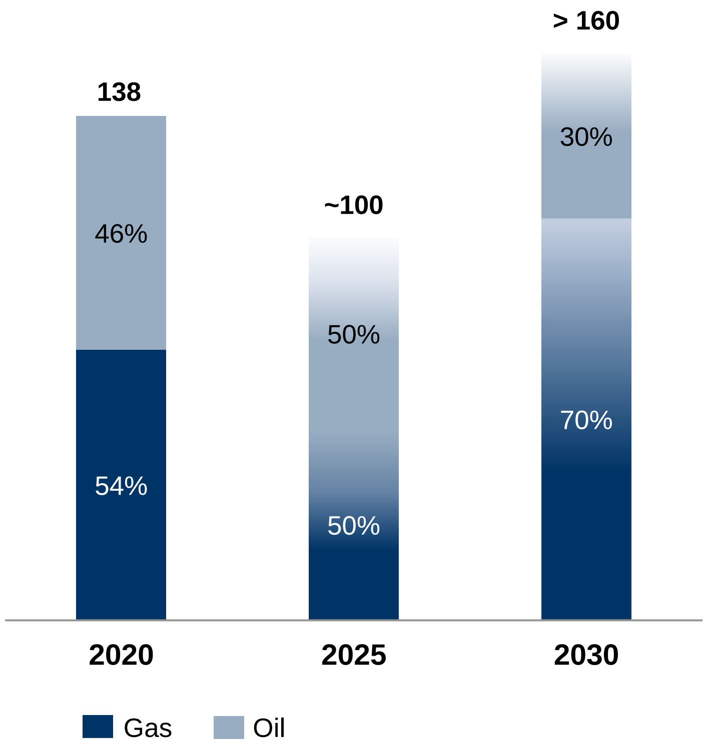
Focus on most profitable barrels

- Portfolio optimization
- Disciplined approach on capex allocation
- ~95% of our oil fields to remain operating cash flow positive at USD 30/bbl by 2030

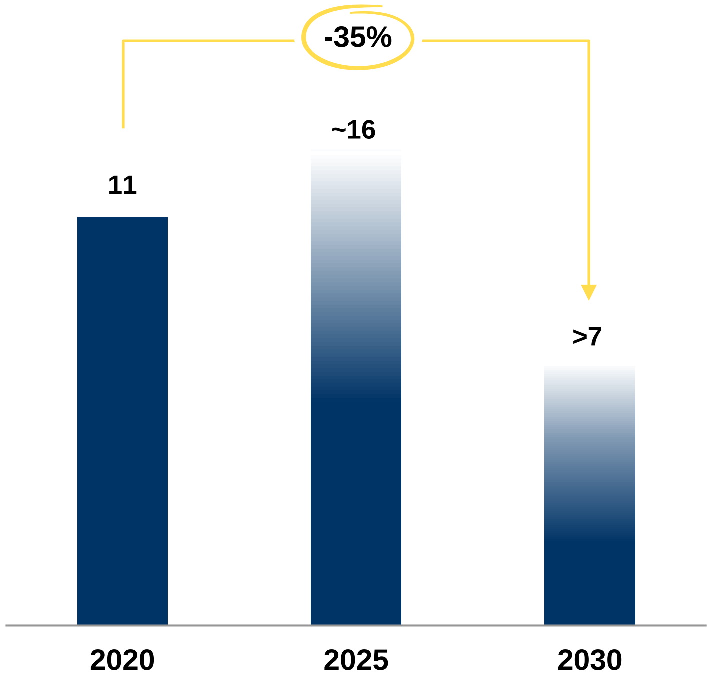
[1] By 2030, for selected fields; [2] On a compounded rate, 2022-2025; updated in February 2024, revised from 6%; [3] By 2030

Transforming while delivering strong cash flows

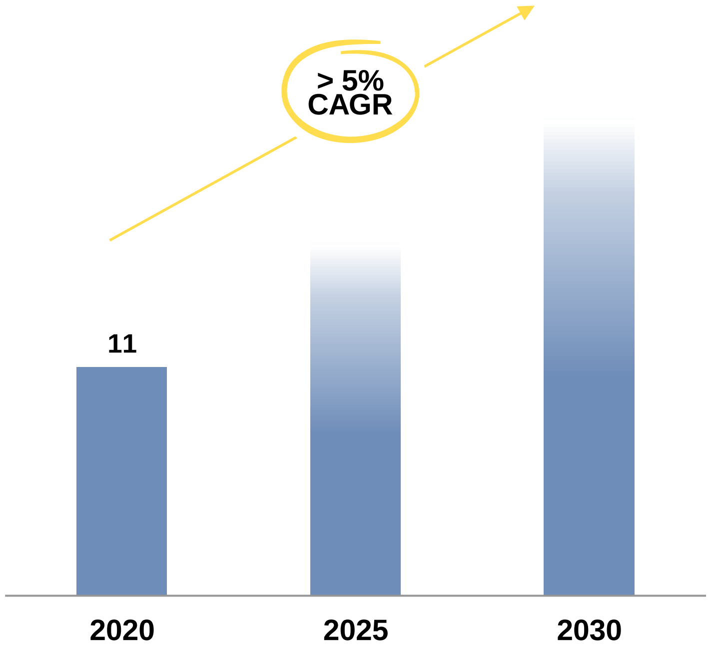
Hydrocarbon production[1]
kboe/d



Production cost
USD/boe



Operating cash flow
USD/boe



[1] *Excluding possible divestments*

Petrobrazi to capture demand growth

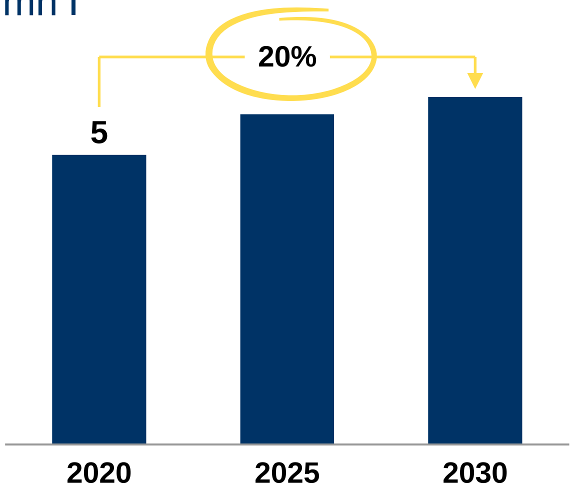
Refinery utilization[1] %	>95 Annual average 2022-2030
Expand aromatics kt/year	+50 2026
Black liquid products yield[2]	-50% 2030 vs 2020
Bottom of the barrel upgrade[3] kt/year	~200 2030

[1] Refers to crude distillation unit; [2] Fuel oil yield decreases from 6% in 2020; [3] Additional non-fuel products, like bitumen, carbon black or calcined coke

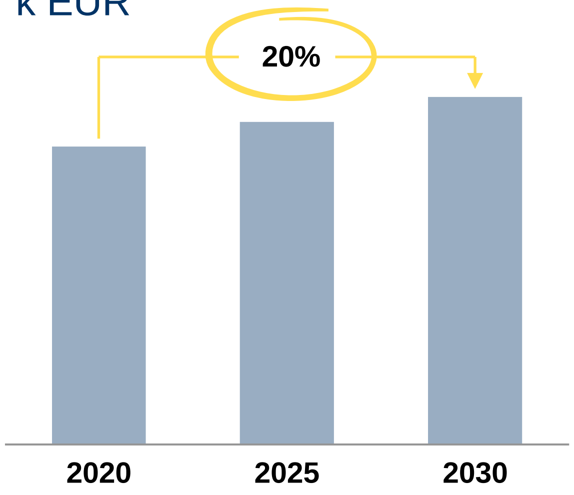
Dual brand strategy to drive new value

Customer focus

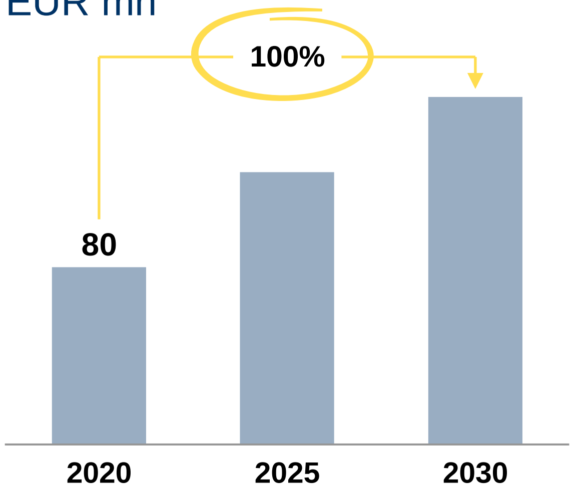
Throughput per filling station[1]
mn l



Profitability per filling station[2]
k EUR



Non-fuel business margin[2]
EUR mn



[1] In Romania; [2] Data refer to OMV Petrom operating region which includes Romania, Bulgaria, Moldova and Serbia

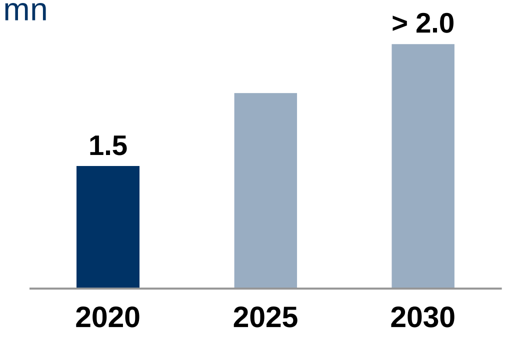
Mobility services of the future

Continue to explore all alternative energy and fuel solutions

#The future is diverse

Customer access – is a competitive advantage which will allow us to make a difference by meeting our diverse clients' needs while decarbonising mobility

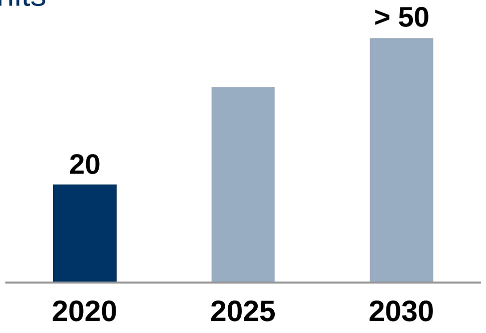
Customers / day[1]
mn



#Mobility and service hub

Service stations – enable our network to increase receptiveness to customers as part of a greater ecosystem, minding environmental footprint

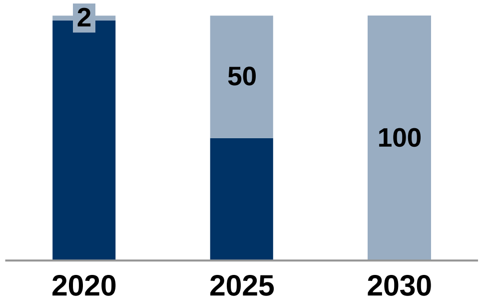
Services in our filling stations
units



#Digitally enabled smart mobility

One single digital gate to our brand – focus on customers, by offering timely and tailor-made future experiences

Share of the network with fast payment[2]
%



[1] Total number of customers in Romania, Bulgaria, Moldova and Serbia; [2] Online Payment Terminal

Supplier of choice

Support gas and power customers in their energy transition

Total gas sales TWh	70 2030
Customers increase	20x 2030 vs 2020
Net electrical output TWh/year	>3.5 Average 2022-2030
Green power sales volume % in total	>20% 2030

2023 - outstanding year for strategy execution

Neptun Deep

- FID taken in June 2023
- >80% of execution contracts awarded
- Reserves recognition contributing to 207% RRR

Renewable power

- CE Oltenia partnership[1]: 450 MW; EU financing contract signed
- Teleorman PV projects: 710 MW
- Renovatio partnership[1]: ~1GW, mostly wind

E-mobility

- 270 charging points installed at end-2023
- EU financing of EUR 12 mn for >300 EV charging points
- RAM[2] acquisition signed – to become the largest e-mobility player in Romania

Attractive dividends

- Record high paid in 2023
- Base DPS: RON 0.0375/share
- Special DPS: RON 0.045/share
- 19.6% total dividend yield[3]

[1] Of which OMV Petrom 50%; [2] Renovatio Asset Management; [3] Using the share price on December 30, 2022

Auchan partnership strengthens our retail business

Successful partnership

- MoU signed in 2019 based on good results of the pilot phase, project accelerated in 2021
- MyAuchan proximity stores in all Petrom branded filling stations in Romania (~400 stations)

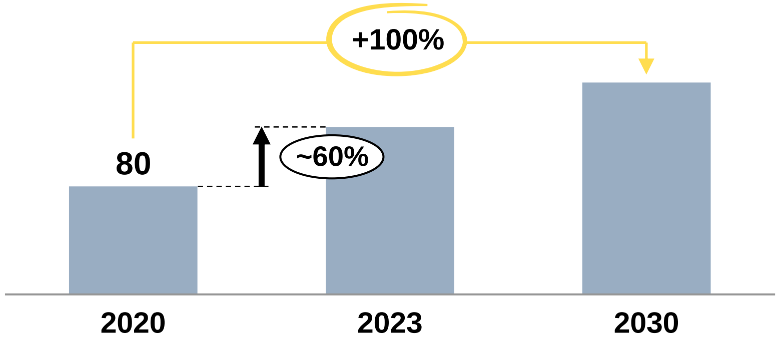
Strong project execution

- Completed one year earlier and on budget
- Joint investment for rebranding and rollout ~EUR 50 mn during 2021-2023

Value contribution

- Extended value for money proposition to a large number of customers each day
- Non-fuel business turnover in Petrom branded filling stations increased by ~40% since deployment (2023 vs. 2020)
- Throughput and profitability per filling station also supported

Non-fuel business margin (OMV and Petrom brands)[1]
EUR mn



[1] *Data refer to OMV Petrom operating region which includes Romania, Bulgaria, Moldova and Serbia*

Strategy 2030:

Transforming for a lower carbon future

OMV Petrom

Our strategy is enabled by a resilient financial frame

Rigorous capital discipline

- CAPEX[1] of ~EUR 11 bn
- ~35% CAPEX for low & zero carbon business
- Strong Internal Rates of Return

Strong financial performance

- We target more than double clean CCS EBIT by 2030[2]
- ROACE > 12% by 2030

Attractive returns to shareholders

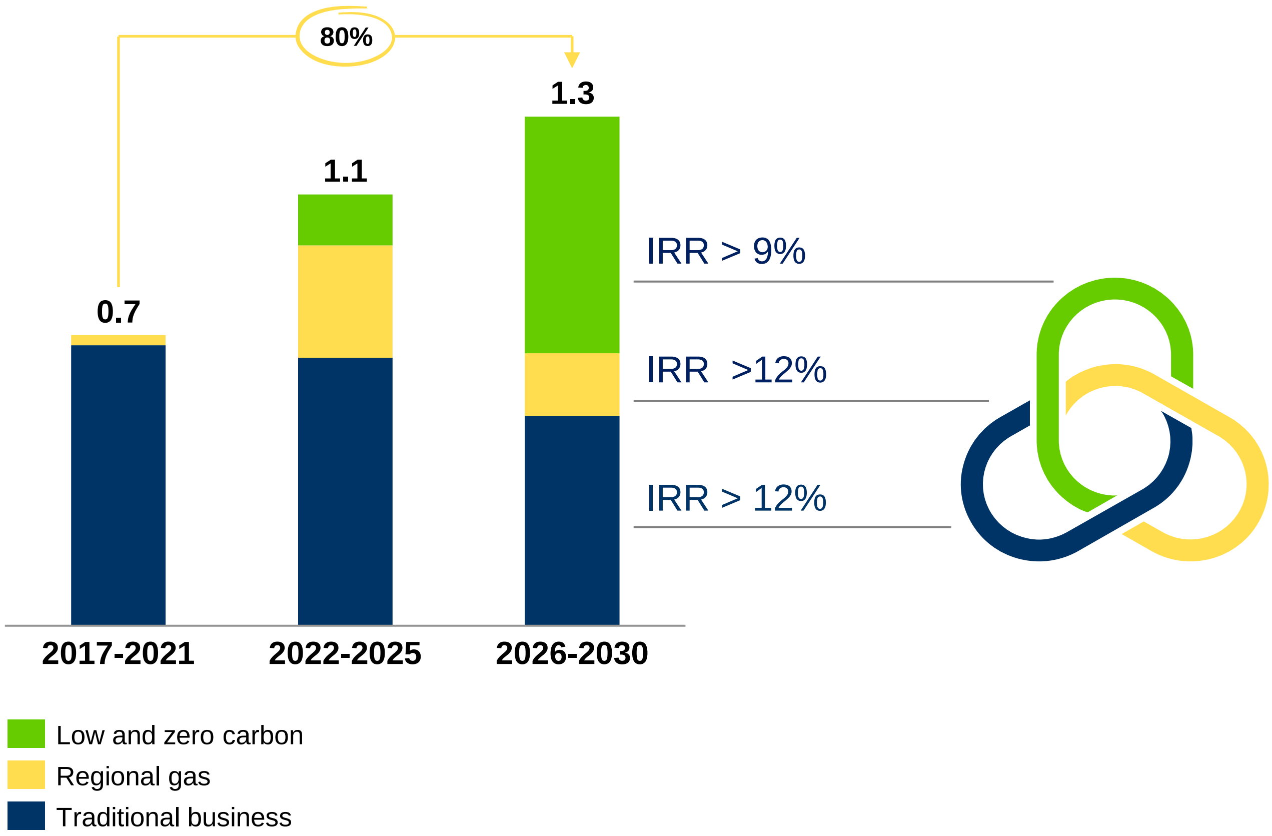
- 5%-10% p.a. dividend growth
- Dividends[1] ~40% Operating Cash Flow
- Gearing ratio[3] < 20%

Financial Frame

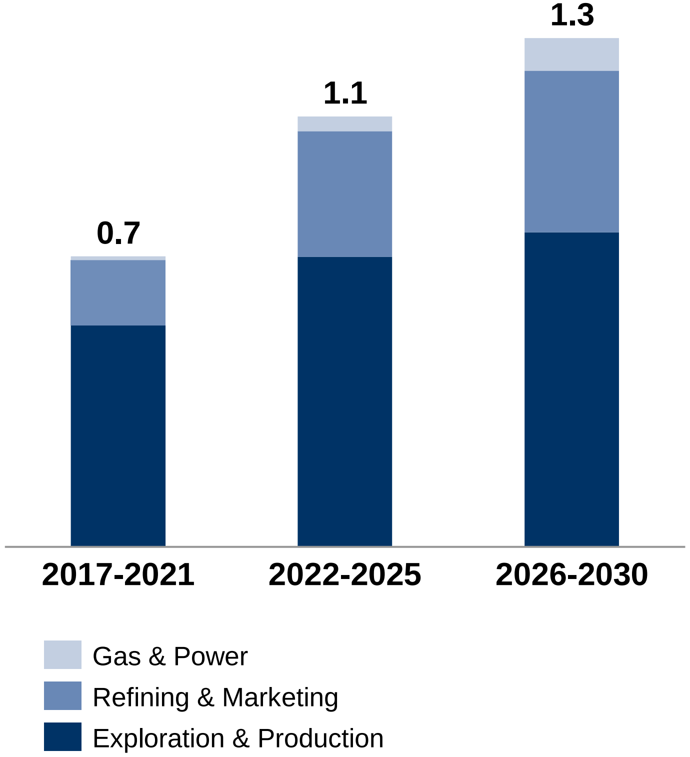
[1] CAPEX and dividends are for 2022-2030 cumulated; [2] Vs 2020. Base case price assumptions (2022 – 2030): Brent oil 65-70 USD/bbl and refining margin: 5-6 USD/bbl; [3] Single year rate

Rigorous capital discipline underpins strategic directions

Average annual CAPEX per strategic pillar
EUR bn

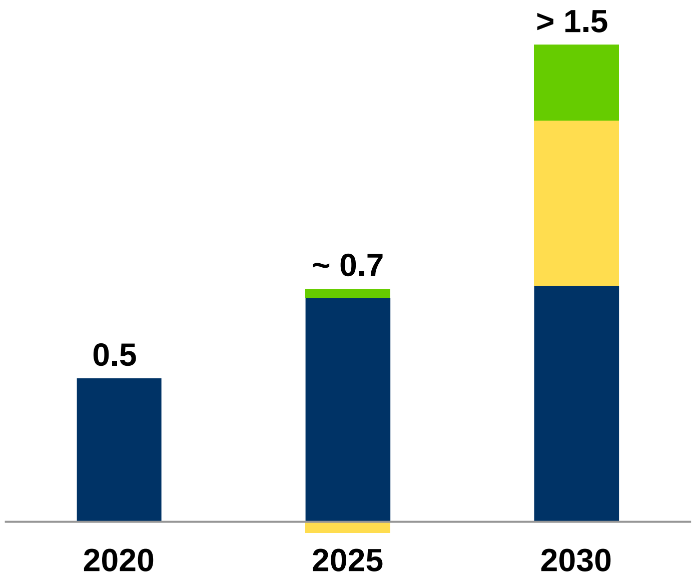


CAPEX breakdown per business segment
EUR bn



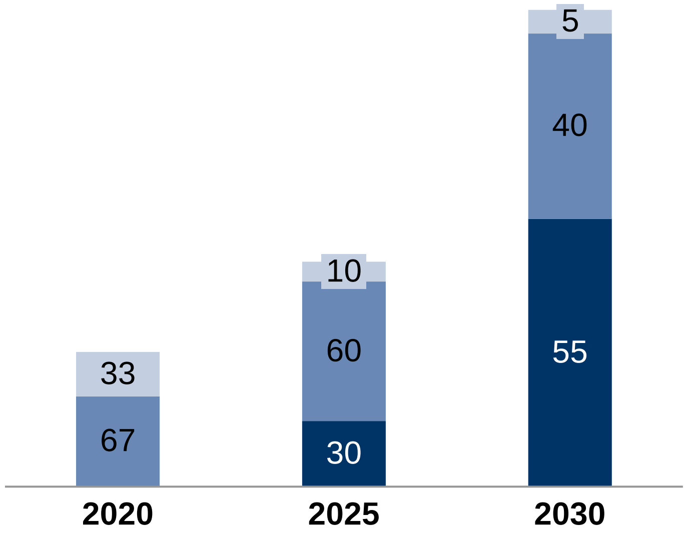
Strong financial performance across the entire business

Clean CCS EBIT per strategic pillar[1]
EUR bn



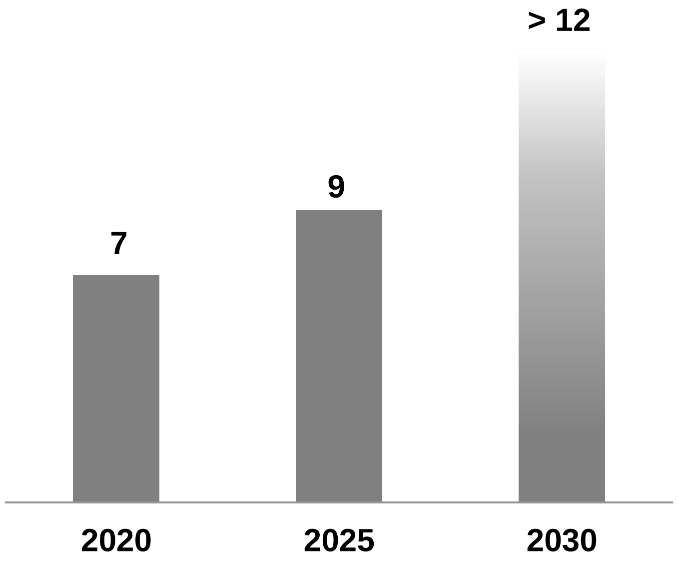
- Low and zero carbon
- Regional gas
- Traditional business

Clean CCS EBIT per business segment[1]
%



- Gas & Power
- Refining & Marketing
- Exploration & Production

Clean CCS ROACE
%

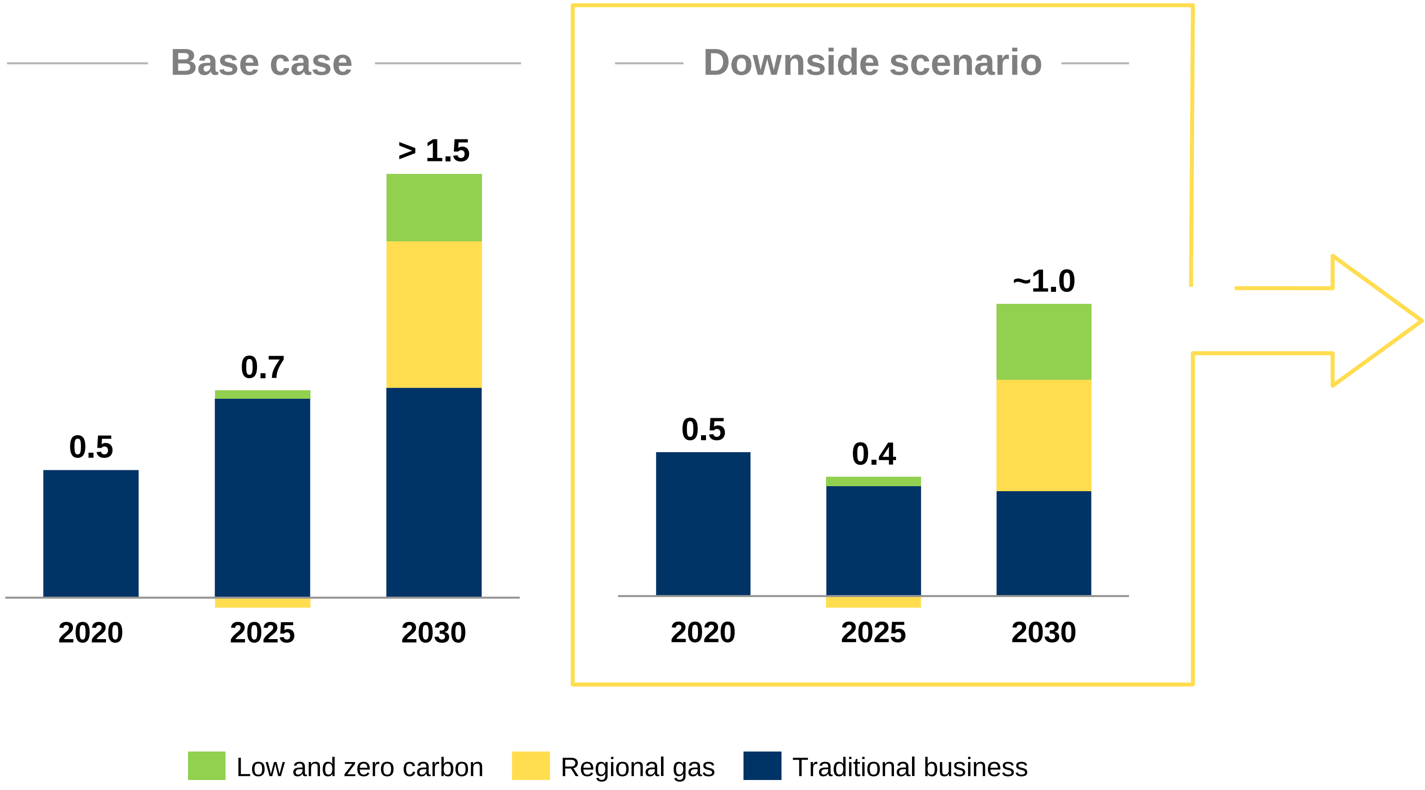


[1] Base case price assumptions (2022 – 2030): Brent oil: 65-70 USD/bbl and refining margin: 5-6 USD/bbl.

Resilience under downside-price scenario[1]

Still strong financial position

Clean CCS EBIT
EUR bn



Under downside price scenario:

- 2030 Clean CCS EBIT to double versus 2020
- Commitment to pay progressive dividends maintained
- CAPEX plans largely unchanged by 2030
- Gearing ratio below 20% throughout the period

[1] *Downside-price assumptions (2022-2030): Brent oil: ~50 USD/bbl and refining margin: 3-4 USD/bbl*

We deliver sustainable long-term value for our shareholders

Sustainable long-term value

- ~35% CAPEX for low & zero carbon
- Clean CCS EBIT more than double by 2030

Delivering sustainable shareholder value

Attractive shareholder returns

- 5% - 10% p.a. growth in base dividend
- Potential special dividends[1]

[1] *Special dividends distributed in 2022 and 2023; intention to propose special dividends in 2024*

Price assumptions

Base case prices	2022 - 2030
Brent oil USD/bbl	65 – 70
Indicator refining margin USD/bbl	5 – 6
CO_2 EUR/tCO_2	55 – 100
Electricity price EUR/MWh	70 – 90

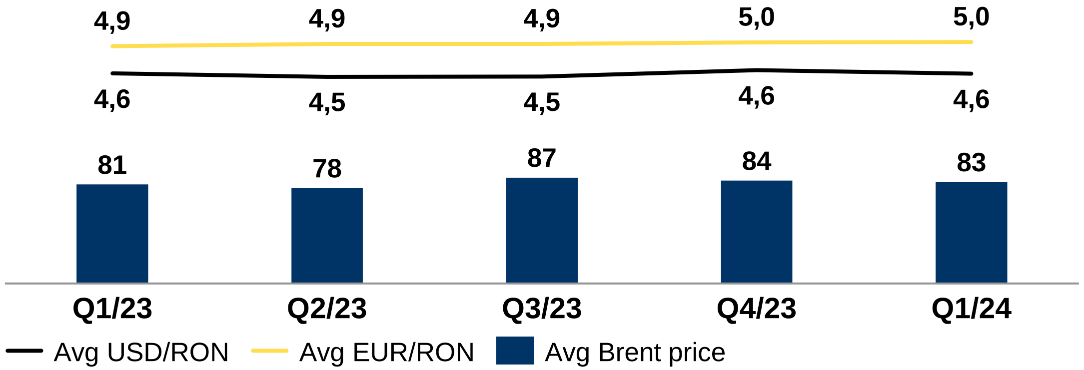
Downside-price scenario	2022 - 2030
Brent oil USD/bbl	~50
Indicator refining margin USD/bbl	3 – 4
CO_2 EUR/tCO_2	60 – 110
Electricity price EUR/MWh	65 – 80

Q1/24 results

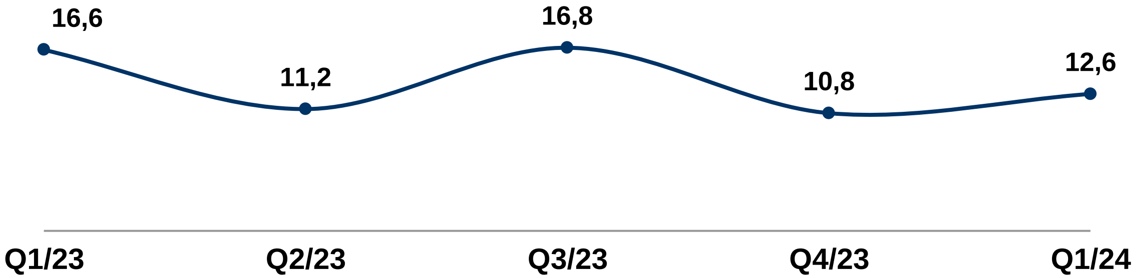
Commodity prices

Volatile market environment

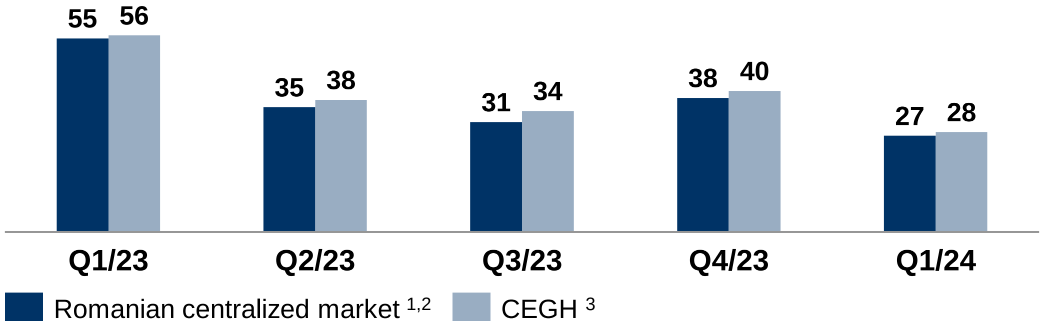
Oil prices — FX
USD/bbl — RON/USD, RON/EUR



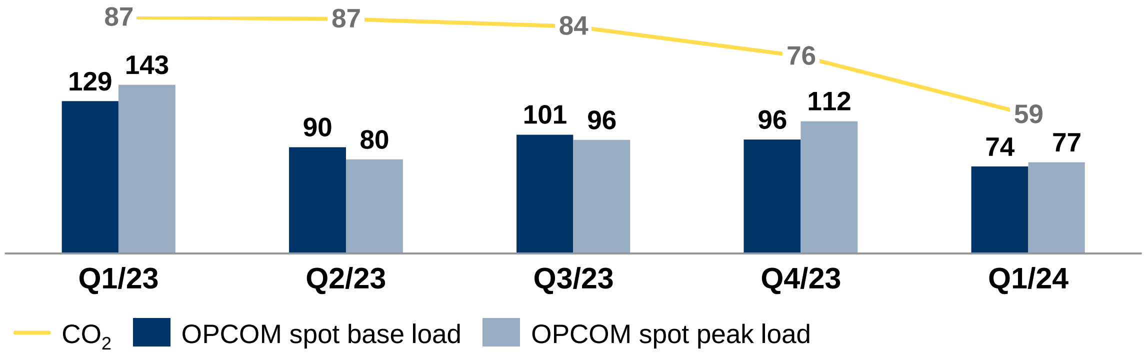
OMV Petrom indicator refining margin
USD/bbl



Gas prices[1]
EUR/MWh



Power prices in Romania[1] — CO_2 prices
EUR/MWh — EUR/t



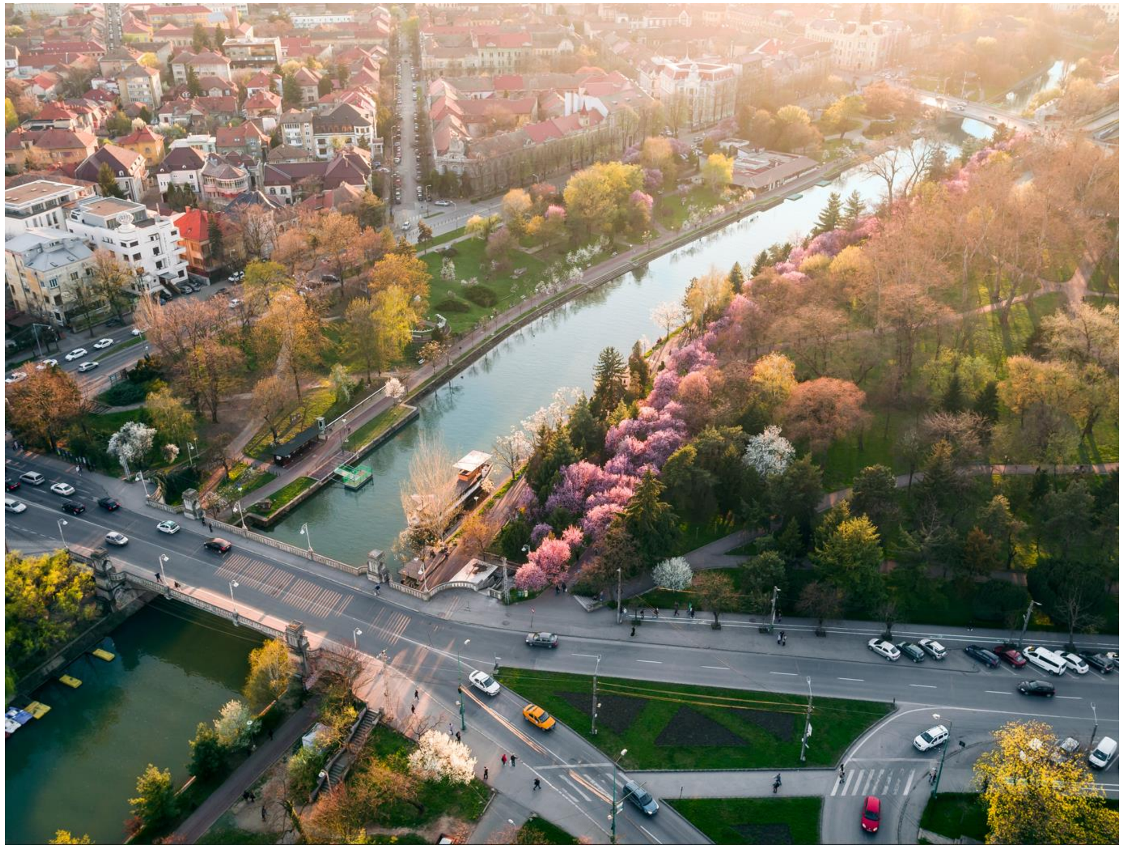
[1] *Prices translated at NBR average RON/EUR rate;* [2] *Day-ahead price, un-weighted average computed based on daily trades published on BRM platform;* [3] *Day-ahead market Central European Gas Hub, un-weighted average*

Growth in demand for all our products returning

GDP Growth expected	**2.1%** 2023[1]	**1.1%** Q4/23[1]	**2.9%** 2024e[2]
Inflation (CPI) On a downward trend	**6.6%** Dec 23/Dec 22	**6.6%** Mar 24/Mar 23[1]	**4.7%** 2024e[3]

Romania maintained at investment grade by major rating agencies[4]

	Demand		
	Q1/24 yoy	**2023 yoy**	**2022 yoy**
Fuels[5]	+6%	+4%	+2%
Gas[6]	+6%	-7%	-16%
Power[7]	+2%	-5%	-8%



[1] Romanian National Institute of Statistics (seasonally adjusted, April 2024 report); [2] European Commission (February 2024); [3] National Bank of Romania (March 2024); [4] S&P (April 2024), Fitch (March 2024), Moody's (Nov 2023); [5] Fuels refer only to retail diesel and gasoline; OMV Petrom estimates; [6] According to company estimates; [7] As per Transelectrica data, gross figures computed based on real time published system data

First steps towards deregulation of gas and power sector

New regulations approved in Q1/24

GEO 32/2024 amends GEO 27/2022

- **Applicability:** starting April 2024; most deadlines of GEO 27 shortened to end-2024
- **Main provisions:**

Gas:

- reduced the gas price cap for HH and PETs[1] to RON 120/MWh
- increased gas regulated supply (margin) component
- gas to power transfer price no longer regulated

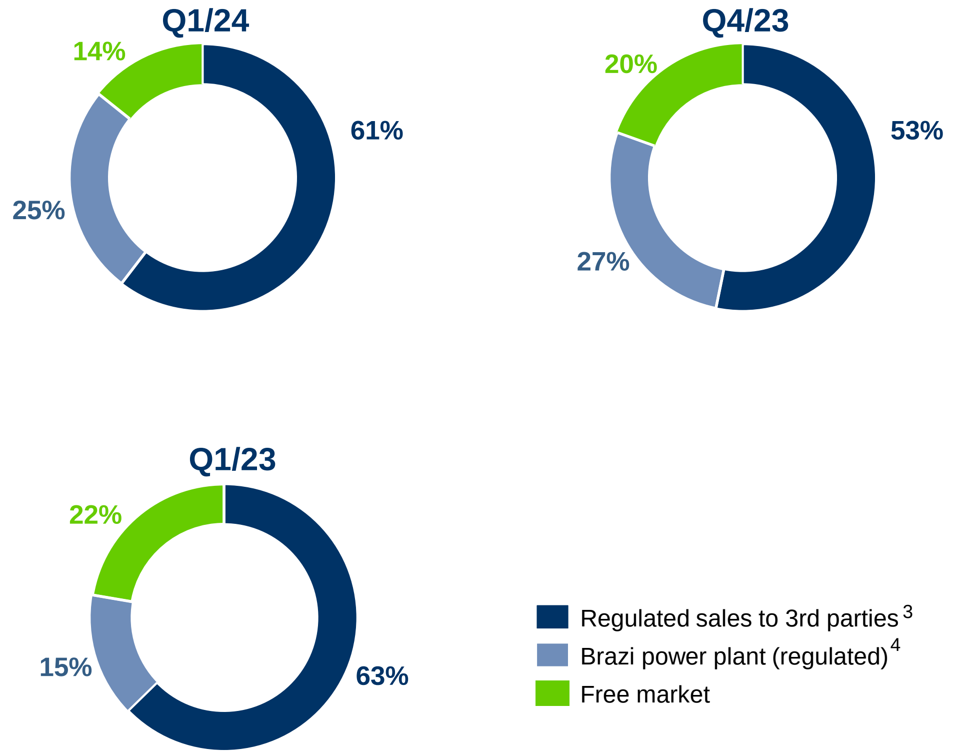
Power:

- MACEE[2]: price reduced to RON 400/MWh for monthly allocations, voluntary starting April 2024, in place until end-2024
- lower threshold for power overtaxation
- CO2 costs no longer recoverable

Gas & power:

- 100% tax on profits above 10% margin for trading (2% before)

Highly regulated gas sales portfolio



[1] HH (households), PETs (heat producers for households); [2] Centralized mechanism for power acquisitions; [3] Includes sales quantities subject to GEO 27/2022 and GEO 119/2022 (households, heat producers for households, cost plus, trading, supplier of last resort); [4] Brazi power plant was subject to GEO 119/2022 between September 2022 and March 2024

Continued to deliver on our Strategy 2030

Good financial performance

Clean CCS Operating result	Operating Cash Flow	Clean CCS ROACE
RON 1.8 bn	RON 3.0 bn	25.2%
-16% yoy	-36% yoy	-12.1 pp yoy

Operational performance

- Hydrocarbon production -4% yoy, good results from new wells and workovers
- Refined product sales: +4% yoy; retail sales volumes +7%; refinery utilization at 93%, above European average
- Record high net electrical output for a first quarter, at 1.6 TWh

Strategic focus

- **Neptun Deep:** progressed according to plan
- **Renewable power:** clearance from Romanian authorities[1] to progress with the announced M&A transaction with Renovatio
- **Green H2:** financing contract signed for two electrolyzers (total capacity 55 MW)
- **E-mobility:** roll-out of charging points in own filling stations progressing (end-Q1/24: 290)
- **Biofuels:** clearance from Romanian authorities[1] for acquisition of a 50% stake in Respira Verde

HSSE

TRIR[2]: 0.40

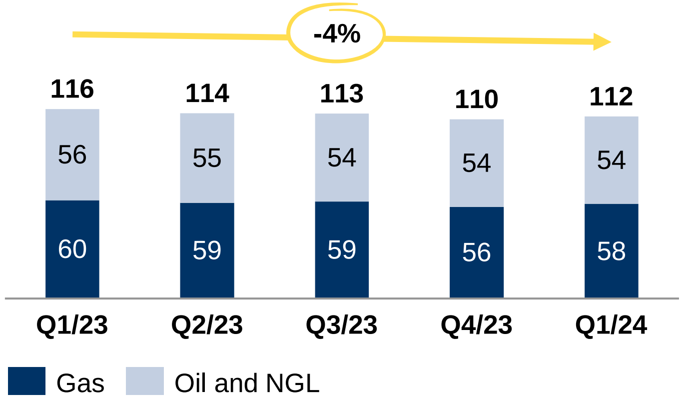
GHG intensity[3]: -11%

[1] Competition Council and Foreign Direct Investment Commission; [2] Total Recordable Injury Rate, April 2023 – March 2024; [3] Greenhouse gases intensity 2023 vs. 2019

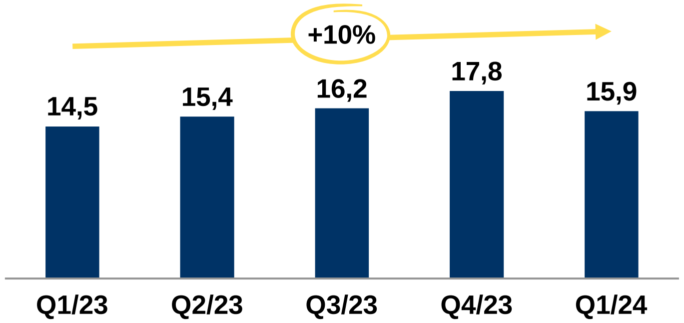
Resilient performance

Exploration and Production

Hydrocarbon production
kboe/d

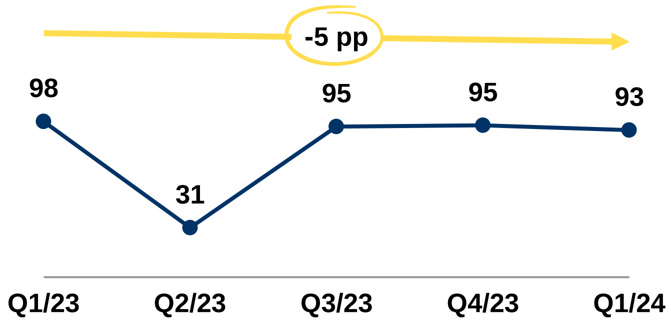


Production cost
USD/boe

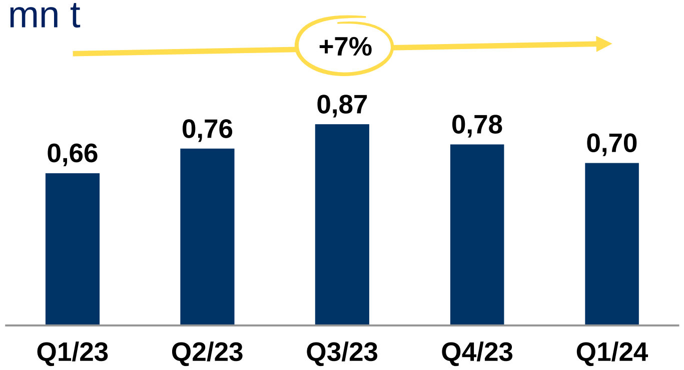


Refining and Marketing

Refinery utilization rate
%

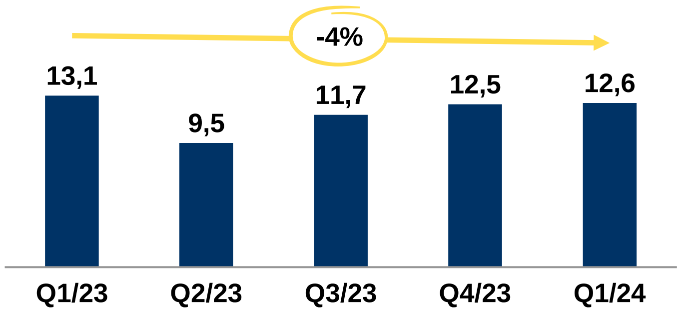


Retail sales volumes
mn t

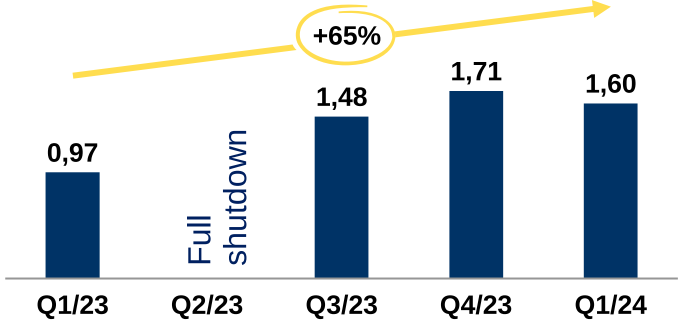


Gas and Power

Gas sales volumes
TWh

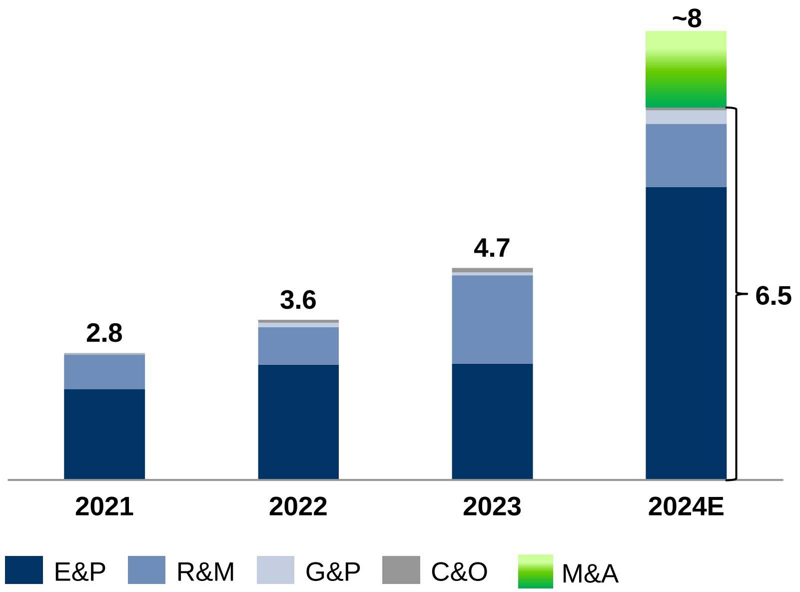


Brazi net electrical output
TWh



Entered the most investment intensive period in our history

Group CAPEX[1]
RON bn



Q1/24

- **RON 1.0 bn:**
  - Neptun Deep project
  - 7 new wells and sidetracks; ~140 workovers
  - New aromatic unit
  - SAF/HVO[2] unit in Petrobrazi

2024E

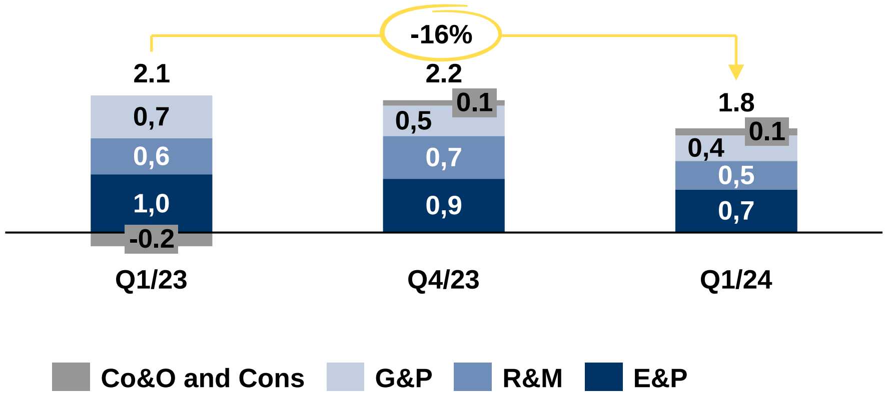
- **RON ~8 bn:**
  - Neptun Deep project
  - Wells and sidetracks: ~40; up to 500 workovers
  - New aromatic unit
  - SAF/HVO[2] unit in Petrobrazi
  - Renewable power projects
  - M&A – announced low and zero carbon transactions

[1] CAPEX including E&A; [2] SAF/HVO: sustainable aviation fuel (bio jet) and hydrotreated vegetable oil

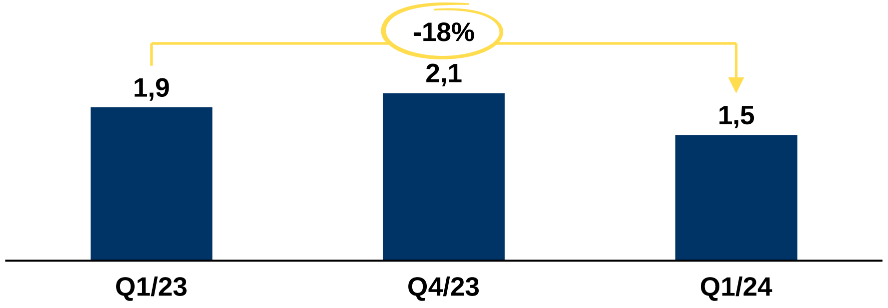
Income Statement

Robust results

Clean CCS Operating Result
RON bn



Clean CCS Net Income[1]
RON bn



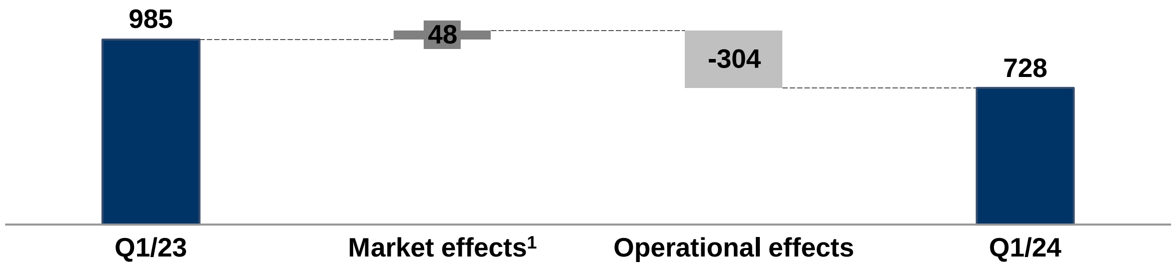
[1] *Attributable to stockholders of the parent*

- **Q1/24 Clean CCS Operating Result reflects**:
  - Lower refining margins and utilization
  - Lower gas and power margins
  - Higher refined products sales
  - Higher electricity sales quantities

- **Q1/24 Clean CCS Net Income evolution** in line with development of operating result

Solid Operating Results

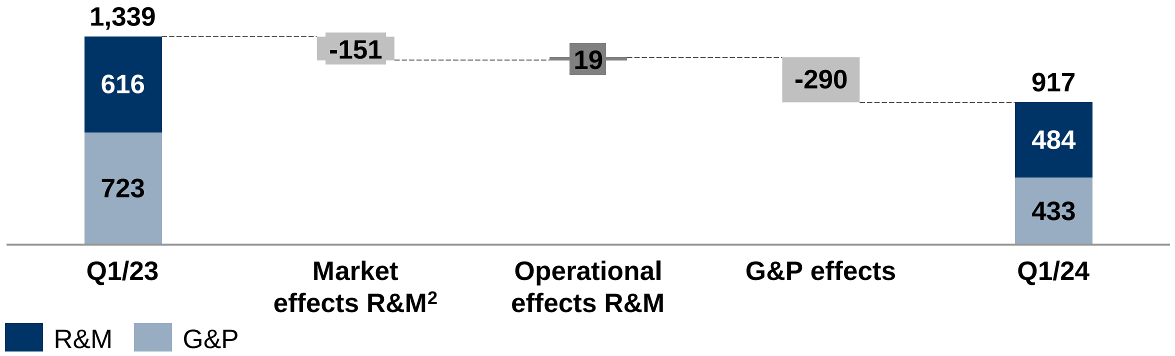
E&P
RON mn



- Lower E&P taxation
- Realized crude price +4%

- Lower realized gas price
- Hydrocarbon sales -3%
- Higher production costs
- Higher depreciation

R&M and G&P
RON mn



- Refined products sales +4%; retail sales +7%
- Improved non-fuel business margin
- Record power production for a first quarter, +65% yoy

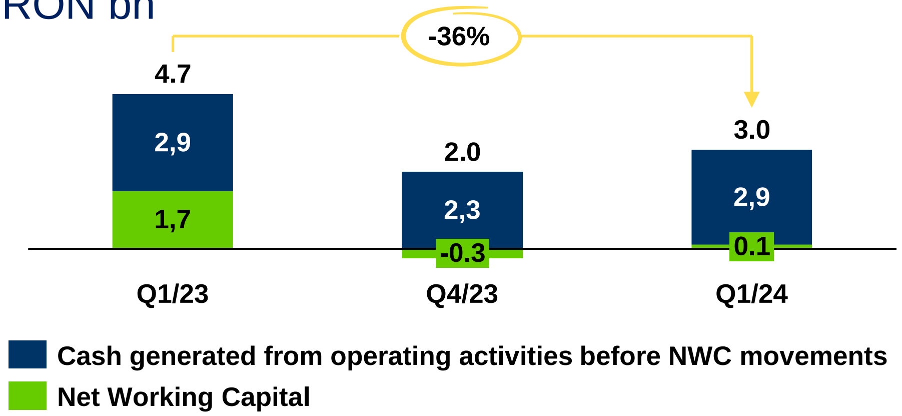
- Refining margin -24%; lower retail and commercial margins
- Additional tax on revenues
- Lower margin on gas from storage
- Lower gas and power margins, especially outside Romania

[1] *Market effects defined as oil and gas prices, foreign exchange impact on revenues, price effect on royalties (including gas over-taxation);* [2] *Market effects based on refining indicator margin*

Strong cash generation

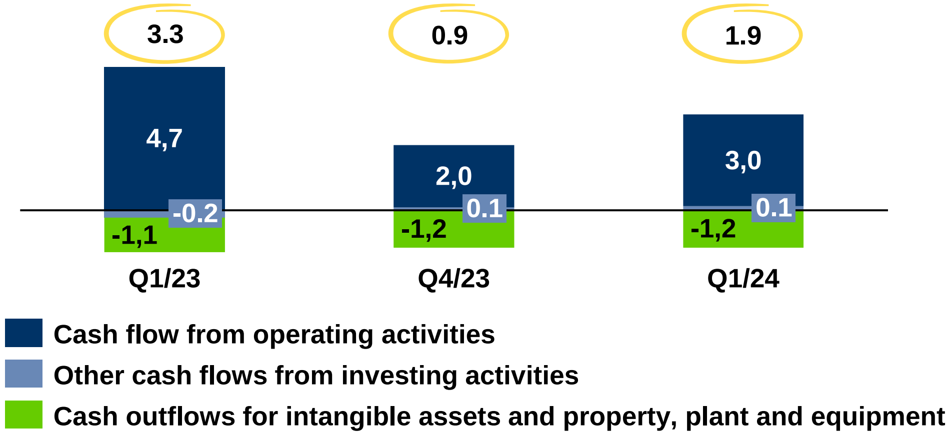
Cash Flow from Operating Activities

RON bn



Free Cash Flow [1]

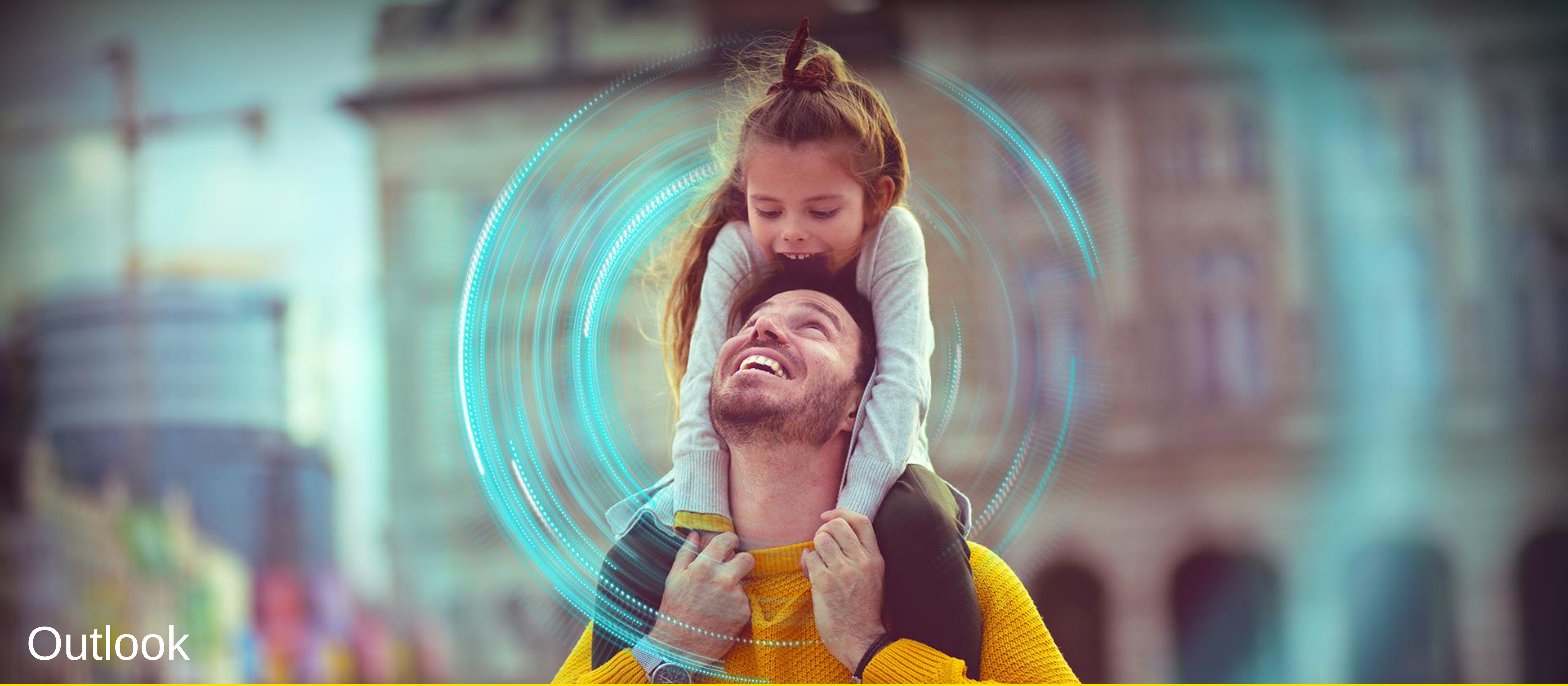
RON bn



- **Q1/24 Cash Flow from Operating Activities**:
  - Operating cash flow before working capital changes stable yoy
  - Positive working capital, yet significantly lower yoy

- **Q1/24 Free Cash Flow[1]:**
  - Reflects trends in Operating Cash Flow
  - Cash outflow from investing activities -24% yoy, due to financial assets
  - Cash outflow from Intangible assets and property, plant and equipment: +9% yoy

[1] *before dividends*



Outlook

OMV Petrom
The energy for a better life.

Outlook

2024-2026

Indicators	Actual Q1/2024	Assumptions/ Targets 2024	Assumptions/ Targets 2025-2026 averages*
Brent oil price	USD 83/bbl	USD ~85/bbl (prev. USD ~80/bbl)	USD ~70-75/bbl
Production [1]	112 kboe/d	>106 kboe/d	~100 kboe/d
Refining margin	USD 12.6/bbl	USD ~10/bbl	USD ~10/bbl
CAPEX	RON 1.0 bn	RON ~8 bn	RON ~8 bn
FCF before dividends	RON 1.9 bn	Positive (prev. Marginally positive)	Marginally negative

[1] *Excluding possible divestments; * Commodity prices currently under review*

EBIT impact in 2024

2024 sensitivities	Change	EBIT impact
Brent oil price	USD +1/bbl	~EUR +15 mn
OMV Petrom indicator refining margin	USD +1/bbl	~EUR +30 mn
Exchange rates EUR/USD	USD appreciation by 5 USD cents	~EUR +50 mn

FY23 results

OMV Petrom

Continue to deliver on our sustainability targets

2023 Sustainability Report published

Clear support for Paris Climate Agreement

E

-11%
Carbon intensity, Scope 1&2 [1]

-72%
Methane intensity in E&P [1]

S

30%
Women in management roles

41mn EUR
Social projects

G

35%
ESG targets in long-term executives' remuneration

1st
Place in ESG risk management in Romania[2]

FUNDAȚIA OMV Petrom

Investments in education, environment and health.

Improved and increased number of ESG ratings

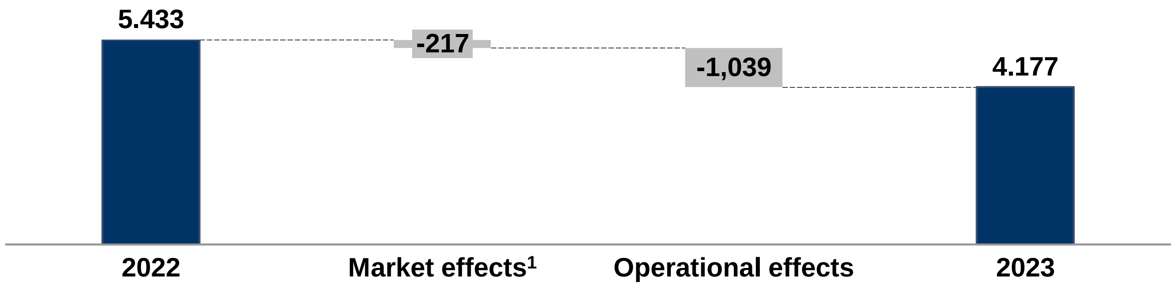
SUSTAINALYTICS a Morningstar company	**Medium risk**	*2022: Medium*
CDP	**A-** [3]	*2022: same*
ISS ESG	**C+**	*2022: C+*
ecovadis	**68/100: Silver**	*2022: 65/100*
S&P Global	**59/100**	
FTSE4Good	**Constituent**	*since June 2023*

[1] Group, 2023 vs. 2019; [2] according to Sustainalytics ratings as of end 2022, best score among BVB listed companies; [3] Based on OMV Group's response

Clean CCS Operating Results

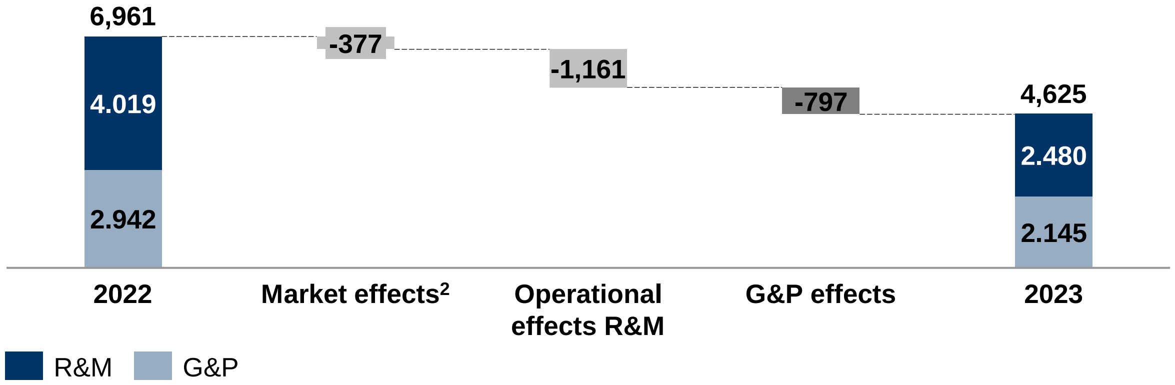
Solid results in all business segments

E&P
RON mn



- Realized crude price -18%
- Lower gas price, partially offset by lower royalties and gas over-taxation
- Higher production costs, +21%
- Hydrocarbon sales -5%
- Unfavourable FX

R&M and G&P
RON mn



- Refining margins -16%; planned refinery turnaround
- Longer yoy planned shutdown of Brazi power plant
- Reduced margins on gas, lower result from gas transactions outside Romania

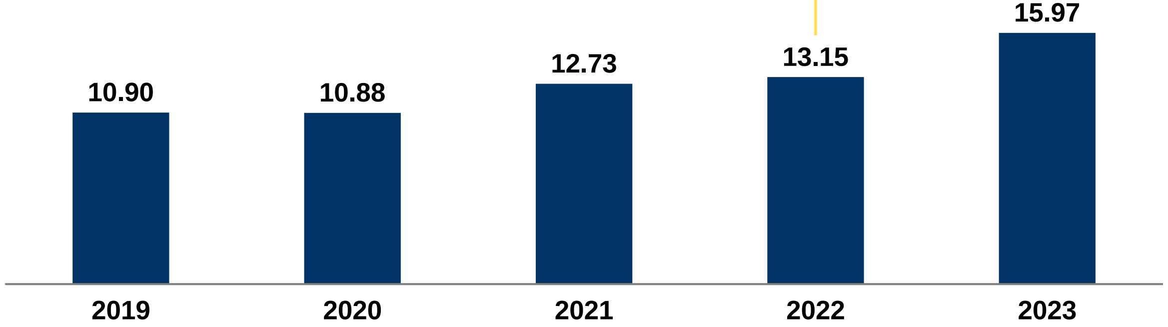
- Higher retail and commercial margins
- Good result on power transactions outside Romania
- Provision for risks related to sector specific taxation set up in Q4/22, partly reversed in Q2/23

[1] Market effects defined as oil and gas prices, foreign exchange impact on revenues, price effect on royalties (including gas over-taxation); [2] Market effects based on refining indicator margin

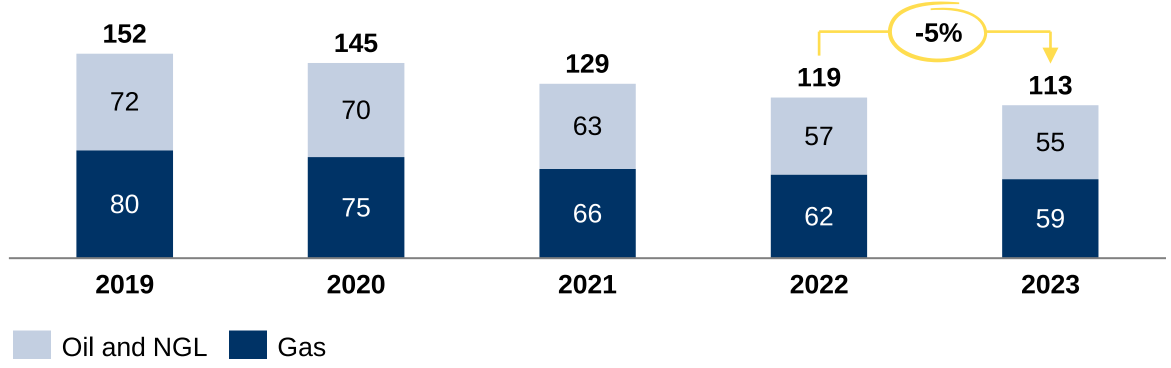
Operational KPIs

Exploration & Production

Production cost
USD/boe



Hydrocarbon production
kboe/d



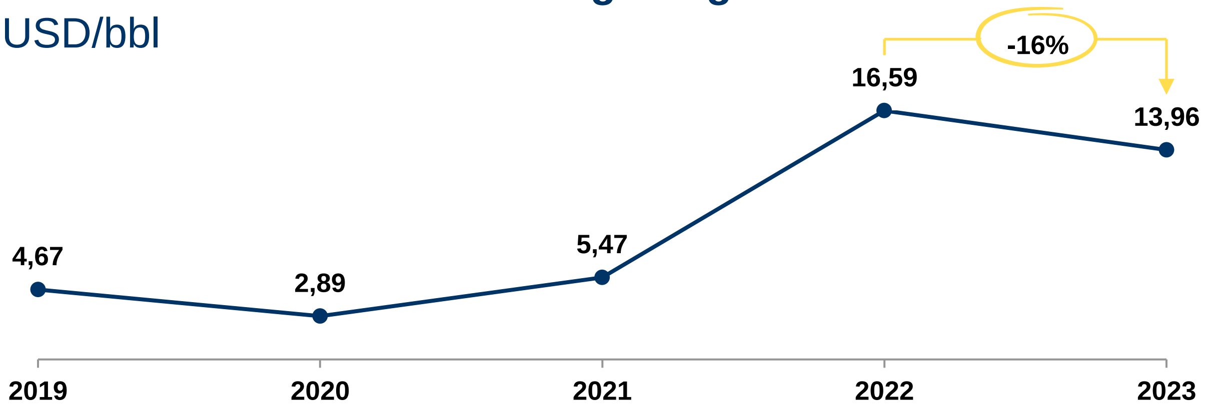
Key drivers 2023 vs. 2022

- Lower production available for sale
- Increased overall costs
- Positive one-off in Q2/22
- Unfavourable FX

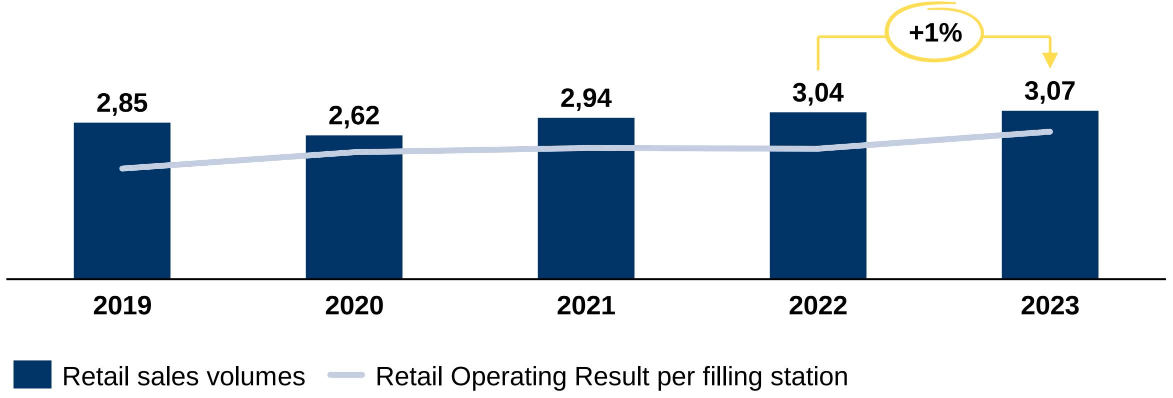
- Natural decline and planned maintenance activities
- Contribution from new wells and workovers

Refining & Marketing

OMV Petrom Indicator refining margin
USD/bbl



Retail sales volumes (mn t) and Retail Operating Result per filling station (trend)



Key drivers 2023 vs. 2022

- Weaker spreads for diesel and jet

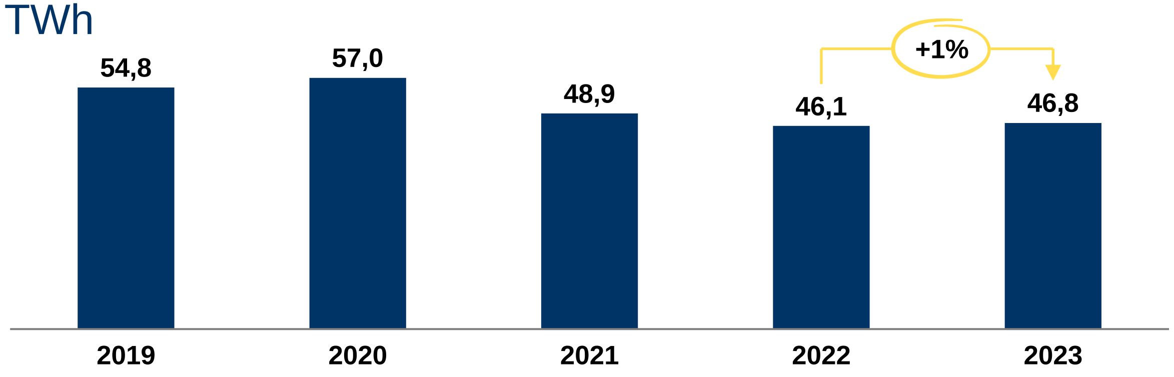
- Retail sales +1% due to improved demand
- Retail operating result per filling station[1] +7.5% CAGR 2019-2023
- Refined product sales -1% reflecting refinery turnaround

[1] *Retail including Cards business*

Operational KPIs

Gas & Power

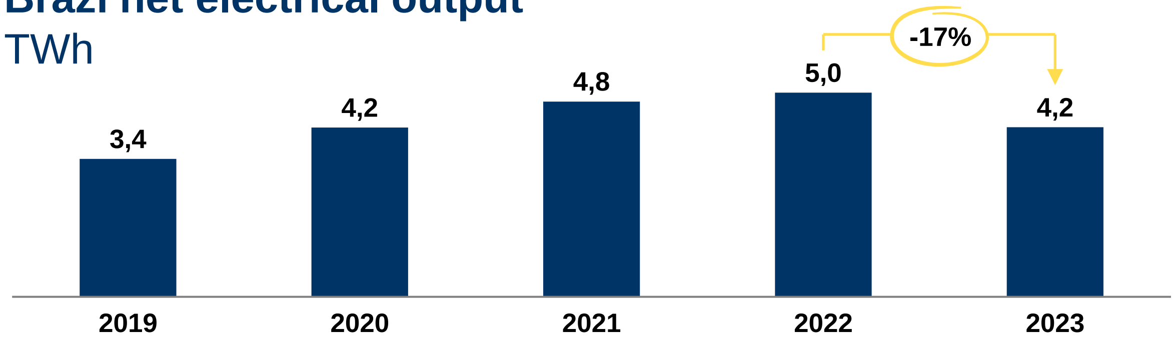
Gas sales volumes
TWh



Key drivers 2023 vs. 2022

- Higher sales to end users and regulated customers
- Expanded regional sales
- Lower equity gas quantities available

Brazi net electrical output
TWh



- Capped gas cost for Brazi power plant for the whole year 2023
- MACEE[1] mechanism in place since Jan 1, 2023

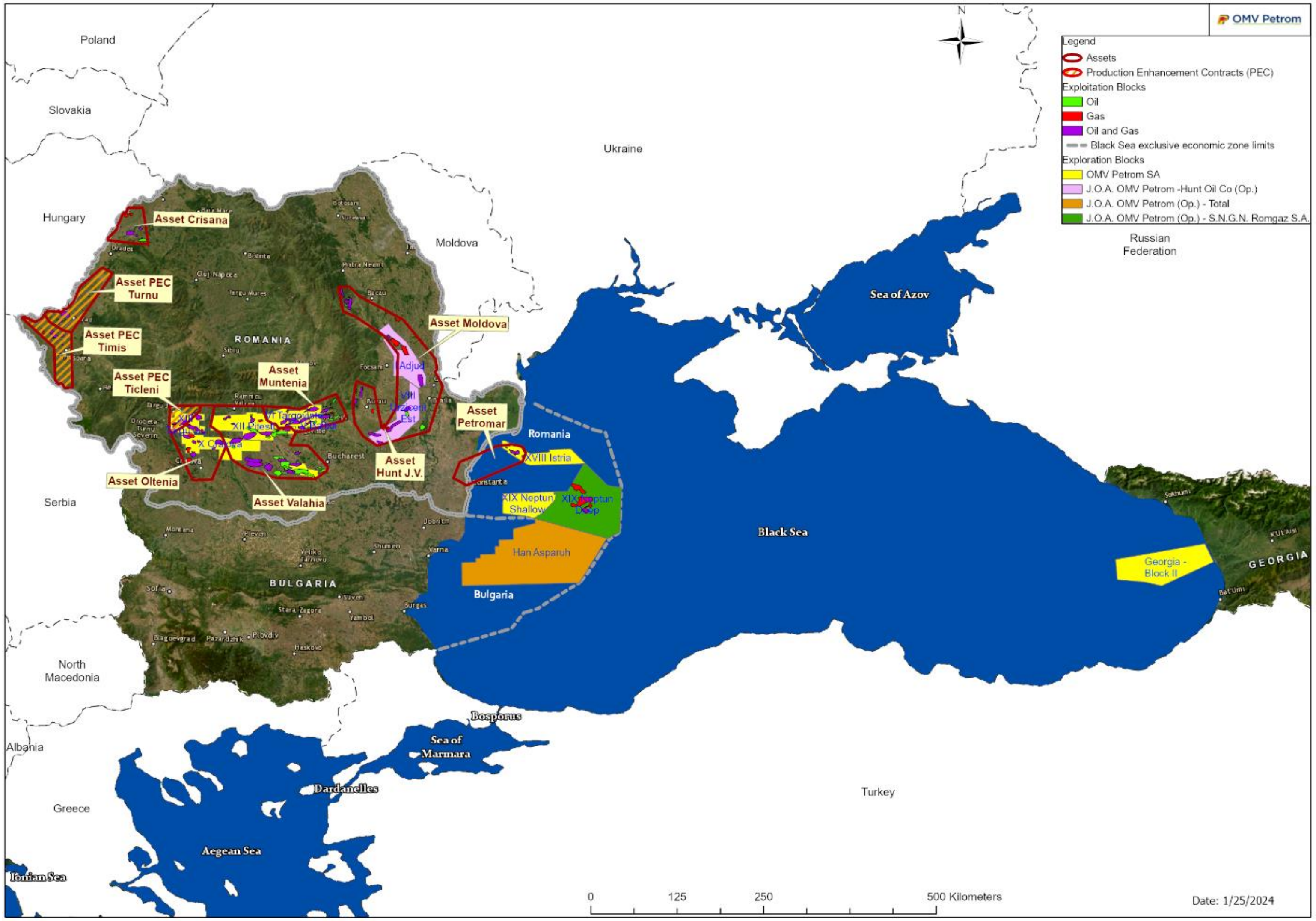
Longer planned outage of Brazi vs. 2022

[1] *Centralised Electricity Purchasing Mechanism*

Appendix

OMV Petrom

Exploration and Production map



Romanian oil market

2023 overview

Crude Supply

Production:
OMV Petrom
27%

Imports:
various
73%

Transportation: Conpet

Refineries

Refineries
combined nameplate capacity
~13 mn tpa

Processed crude oil[1]
~10.2 mn t pa of which
~ 7.5 mn t from import

58%

- Petrobrazi
  OMV Petrom
- Rompetrol
  (Petromidia, Vega)
- Lukoil
  (Petrotel)

Petroleum products imports
42%

Distribution

OMV Petrom
OMV

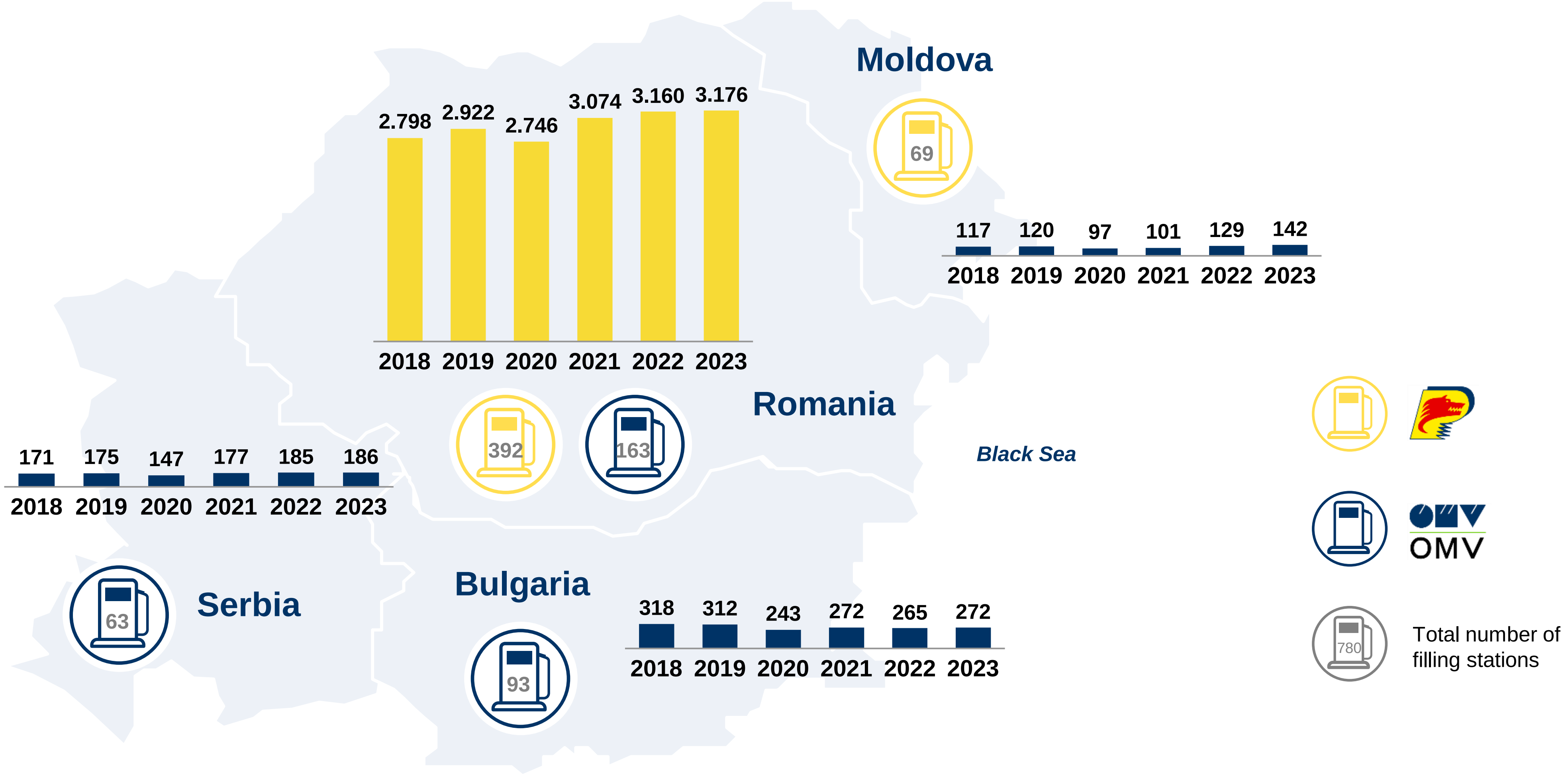
Rompetrol, Lukoil, Mol, others
(GAZPROM, NIS, SOCAR, independent retailers)

[1] *Only crude oil processed (other feedstock not included). Data source: National Institute of Statistics (INS) and OMV Petrom calculations*

780 filling stations at end 2023

Retail fuel sales

mn l



Romanian gas market

2023 overview

Regulatory | **Supply** | **Distribution** | **Demand**

Regulatory

Regulatory Body

Romanian Energy Regulatory Authority (ANRE)

Supply

Production:

OMV Petrom

Romgaz, BSOG,…

95%

Net imports: various

5%

Storage: Romgaz, Depomures

Trans-portation: Transgaz

Supply:

OMV Petrom

Romgaz, Engie Romania, E.ON Energie Romania, ...

Distribution

Distrigaz Sud (Engie), Delgaz Grid (E.ON), ...

Demand

- Heat & Power incl. OMV Petrom
- Industry/ Commercial
- Residential
- Technological consumption
- Export

Data source: ANRE monthly monitoring reports until October 2023; Company estimates afterwards

Romanian power market

2023 overview

Regulatory	Supply		Market(s)	Distribution	Demand
Regulatory Body Romanian Energy Regulatory Authority (ANRE)	Production: Coal 14% Gas 17% Nuclear 20% Renew-ables 16% Hydro 32% Imports	Transport & Distribution System Operator (TSO & DSO)	• Mid/long term fwd contract market(s) (OPCOM / bilateral) • Spot (DAM / ID) market (OPCOM) • Ancillary services & Balancing market (TSO) • Cross border market	Distribution Operators (DSO)	• Internal market • Export

Source: Transelectrica real-time system data, may be subject to change

Cash flow Statement

RON mn	2019	2020	2021	2022	2023
Cash flow from operating activities (CFO)	**6,803**	**5,556**	**6,997**	**11,337**	**10,114**
Thereof, Change in net working capital (NWC)	-256	964	-433	-3,544	1,915
Cash flow from investing activities (CFI)	**-3,556**	**-3,163**	**-2,253**	**-3,104**	**-5,730**
Cash flow from financing activities (CFF), of which	**-1,844**	**-1,921**	**-1,914**	**-4,300**	**-5,300**
Dividends paid	-1,516	-1,740	-1,741	-4,438	-5,102
Cash and equivalents at end of period	**7,014**	**7,451**	**10,323**	**14,256**	**13,339**
Free cash flow (FCF)	3,246	2,393	4,744	8,232	4,384
Free cash flow after dividends	**1,730**	**652**	**3,003**	**3,794**	**-717**

Financial performance

Income Statement

RON mn		2019	2020	2021	2022	2023
Sales		**25,485**	**19,717**	**26,011**	**61,344**	**38,808**
Clean CCS Operating Result		**4,573**	**2,287**	**4,346**	**12,198**	**8,482**
Thereof	Exploration & Production	2,845	7	1,814	5,433	4,177
	Refining & Marketing	1,501	1,454	2,041	4,019	2,480
	Gas & Power	282	718	781	2,942	2,145
	Corporate and Other	-89	-84	-87	-96	-93
	Consolidation	34	193	-203	-99	-227
Operating Result		**4,245**	**1,467**	**3,709**	**12,039**	**7,554**
Financial result		32	12	-311	17	263
Solidarity contribution on refined crude oil						-2,729
Taxes on income		-642	-188	-534	-1,756	-1,058
Net income[1]		**3,635**	**1,291**	**2,864**	**10,301**	**4,030**
Clean CCS net income[1]		**3,863**	**1,931**	**3,353**	**10,273**	**7,464**

[1] *Attributable to stockholders of the parent*

Financial performance

Operating Result

RON mn		2019	2020	2021	2022	2023
Clean CCS Operating Result		**4,573**	**2,287**	**4,346**	**12,198**	**8,482**
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	Consolidation	34	193	-203	-99	-227
Operating Result		**4,245**	**1,467**	**3,709**	**12,039**	**7,554**
Thereof	Exploration & Production	2,589	-985	1,660	3,612	4,170
	Refining & Marketing	1,475	1,060	2,663	4,076	2,318
	Gas & Power	438	1,257	-253	4,662	1,474
	Corporate and Other	-156	-105	-99	-250	-161
	Consolidation	-102	240	-263	-61	-248

Financial performance

Key indicators

in RON mn	2019	2020	2021	2022	2023	Q1/22	Q2/22	Q3/22	Q4/22	Q1/23	Q2/23	Q3/23	Q4/23	Q1/24
Sales	25,485	19,717	26,011	61,344	38,808	11,898	13,683	18,667	17,096	9,473	8,391	10,662	10,282	8,544
Clean CCS Operating Result	4,573	2,287	4,346	12,198	8,482	2,241	3,660	4,230	2,067	2,095	1,614	2,530	2,243	1,769
Operating Result [1]	4,245	1,467	3,709	12,039	7,554	2,185	3,532	5,203	1,119	1,617	1,559	2,417	1,961	1,599
Operating result before depreciation	7,879	5,145	7,209	17,159	10,812	2,934	4,397	5,997	3,830	2,349	2,308	3,283	2,872	2,492
Clean CCS net income attributable to stockholders	3,863	1,931	3,353	10,273	7,464	1,788	2,980	3,649	1,855	1,881	1,471	2,057	2,055	1,540
Net income attributable to stockholders	3,635	1,291	2,864	10,301	4,030	1,748	2,898	4,510	1,145	1,481	-537	1,604	1,482	1,399
Cash flow from operating activities	6,803	5,556	6,997	11,337	10,114	2,640	3,746	3,189	1,762	4,660	412	3,011	2,031	2,988
Free cash flow after dividends	1,730	652	3,003	3,794	-717	1,911	1,111	-73	846	3,290	-3,476	1,352	-1,883	1,894
Non-current assets	34,933	34,505	32,655	32,218	35,373	32,077	31,856	31,971	32,218	33,096	35,020	34,144	35,373	35,344
Total equity	33,501	33,071	34,214	40,508	39,379	35,995	36,908	38,986	40,508	41,998	39,114	37,895	39,379	40,761
Net debt / (cash)	-5,982	-6,486	-9,391	-13,463	-12,551	-11,257	-12,337	-12,261	-13,463	-16,727	-13,231	-14,525	-12,551	-14,385
CAPEX	4,225	3,206	2,821	3,551	4,704	629	760	901	1,261	959	1,434	988	1,323	972
Gearing ratio	n.m.	n.m.	n.m.	n.m.	n.m.	n.m.	n.m.	n.m.	n.m.	n.m.	n.m.	n.m.	n.m.	n.m.
Clean CCS EPS (RON) [2]	0.0682	0.0341	0.0550	0.1679	0.1198	0.0293	0.0489	0.0599	0.0300	0.0302	0.0236	0.0330	0.0330	0.0247
EPS (RON) [2]	0.0642	0.0228	0.0470	0.1684	0.0647	0.0287	0.0475	0.0740	0.0185	0.0238	- 0.0086	0.0257	0.0238	0.0225
Clean CCS ROACE (%)	14%	6%	13%	38%	27%	18%	27%	37%	38%	37%	31%	25%	27%	25%
Payout ratio	48%	136%	156% [3]	50% [5]	64% [7]									
Dividend per share (gross, RON)	0.0310	0.0310	0.0791 [4]	0.0825 [6]	0.0413 [7]									
Employees at the end of the period	12,347	10,761	7,973	7,742	7,714	7,907	7,839	7,768	7,742	7,735	7,700	7,703	7,714	8,157

NBR rates	2019	2020	2021	2022	2023	Q1/22	Q2/22	Q3/22	Q4/22	Q1/23	Q2/23	Q3/23	Q4/23	Q1/24
EUR/RON average	4.75	4.84	4.92	4.93	4.95	4.95	4.95	4.91	4.92	4.92	4.95	4.95	4.97	4.97
USD/RON average	4.24	4.24	4.16	4.69	4.58	4.41	4.64	4.88	4.83	4.59	4.55	4.55	4.63	4.58

*[1] Specific E&P taxes in Romania for **2022** amounted to RON 5,374 mn, representing 33% of total E&P hydrocarbon revenues (offshore gas specific taxes account for ~51% of E&P offshore gas revenues), and include royalties (RON 2,094 mn) and supplementary oil and gas taxation (RON 3,280 mn). G&P supplementary gas and power taxation amounted to RON 1,536 mn. The voluntary discount for fuel customers in Romania had a negative impact of RON ~470 mn in the R&M Clean CCS Operating Result.*

*Specific E&P taxes in Romania for **2023** amounted to RON 2,533 mn, representing 21% of total E&P hydrocarbon revenues (offshore gas specific taxes account for ~18% of E&P offshore gas revenues), and include royalties (RON 881 mn) and supplementary oil and gas taxation (RON 1,652 mn). G&P supplementary gas and power taxation amounted to RON 680 mn.*

*Specific E&P taxes in Romania for **Q1/24** amounted to RON 410 mn, representing 16% of total E&P hydrocarbon revenues (offshore gas specific taxes account for ~12% of E&P offshore gas revenues), and include royalties (RON 180 mn) and supplementary oil and gas taxation (RON 218 mn). G&P supplementary gas and power taxation amounted to RON 8 mn. New tax on revenues introduced in 2024 amounted to ~RON 54 mn.*

[2] Figures from previous periods have been adjusted retrospectively as per IFRS requirements following the share capital increase finalized in 2022; [3] Includes special dividend of RON 0.0450/share declared and paid in 2022; [4] Includes RON 0.0341/share base dividend for 2021 and RON 0.0450/share special dividend declared and paid in 2022; [5] Includes special dividend of RON 0.0450/share declared and paid in 2023; [6] Includes RON 0.0375/share base dividend for 2022 and RON 0.0450/share special dividend declared and paid in 2023; [7] Base dividend only

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Financial calendar 2024

June 19: Capital Markets Day

July 31: Q2 2024 results

October 29: Q3 2024 results