

Capital Markets Day OMV Petrom

Progress on
Strategy 2030 execution

Bucharest | September 29, 2026



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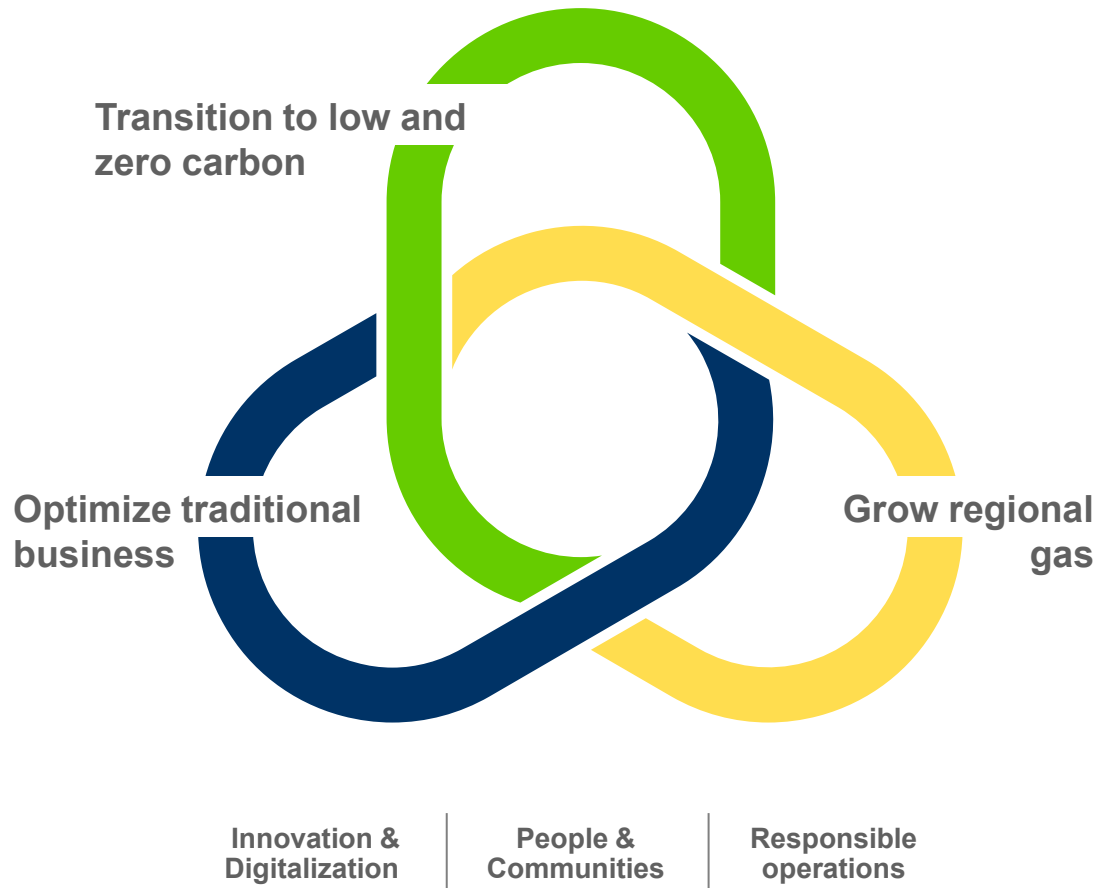
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Key
messages

Providing reliable energy. Progressing towards a lower carbon future¹. Delivering value for our stakeholders.



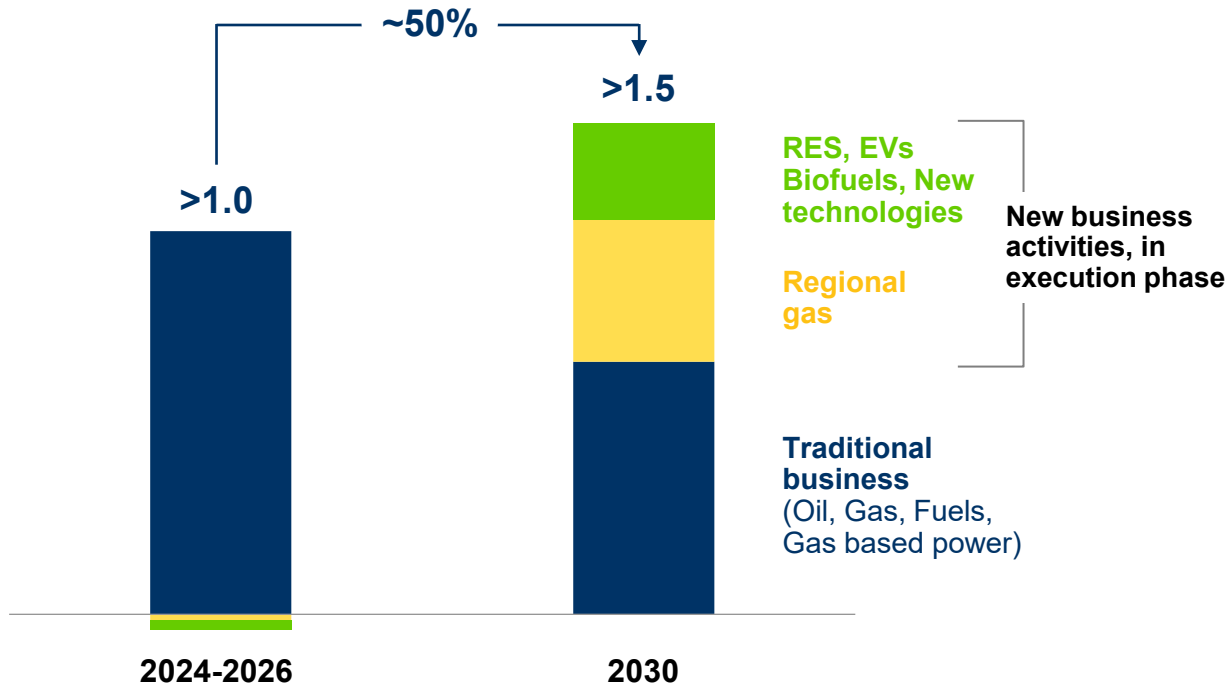
- > We are delivering on our Strategy 2030 through three areas of strategic growth:
 - **Black Sea gas:** Neptun Deep, exploration opportunities
 - **Integrated power business:** renewables and battery storage complementing our flexible gas-fired generation
 - **Sustainable transportation:** biofuels² and e-mobility³
- > We are building our transformation on a robust integrated traditional business
- > Our strong financial position is enabling attractive shareholder returns

¹ Scope 1-2 GHG absolute emissions reduction target: -30% until 2030 vs. 2019; ² SAF/HVO capacity of 250 kt/year operational in 2028; ³ ~5,000 charging points for EVs by 2030

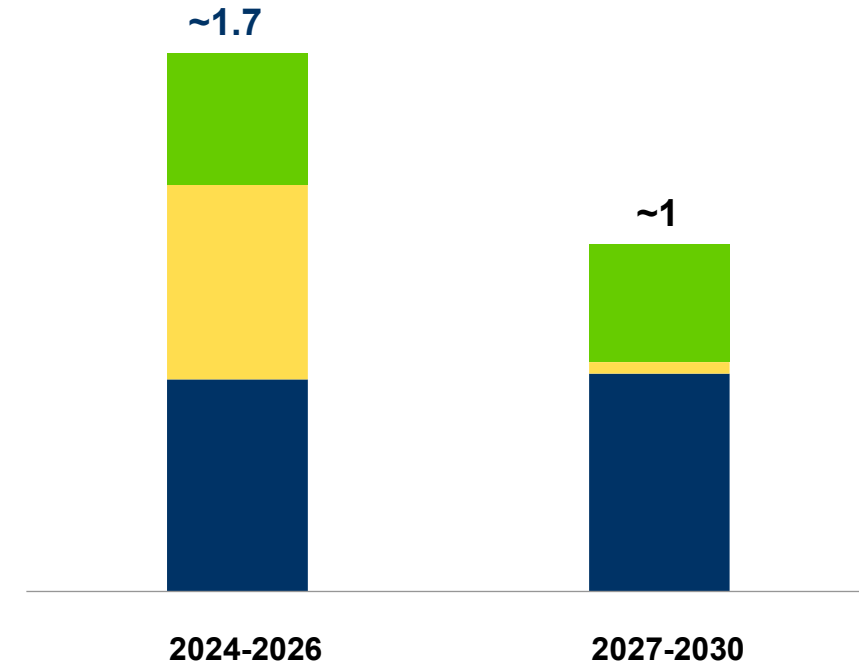
Our business transformation in progress

Transformation drives ~50% higher Group profitability by 2030

Average annual Clean CCS EBIT
per strategic pillar, EUR bn



Average annual CAPEX
per strategic pillar, EUR bn



Competitive dividend distributions and total shareholder returns

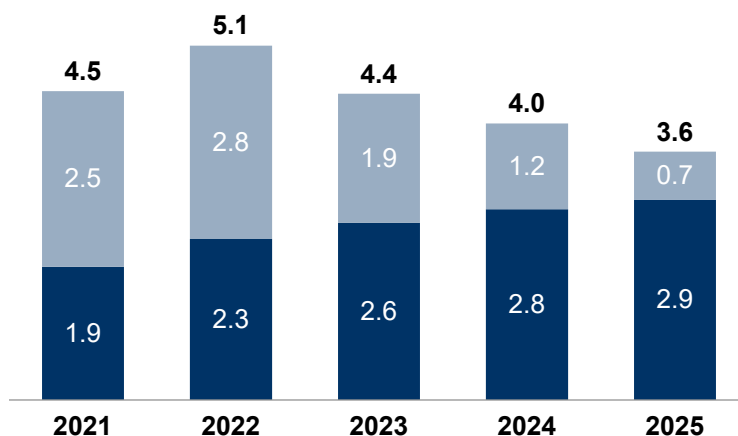
Strong dividend yield¹ %

15.9	19.6	12.4	9.1	5.8
2021	2022	2023	2024	2025

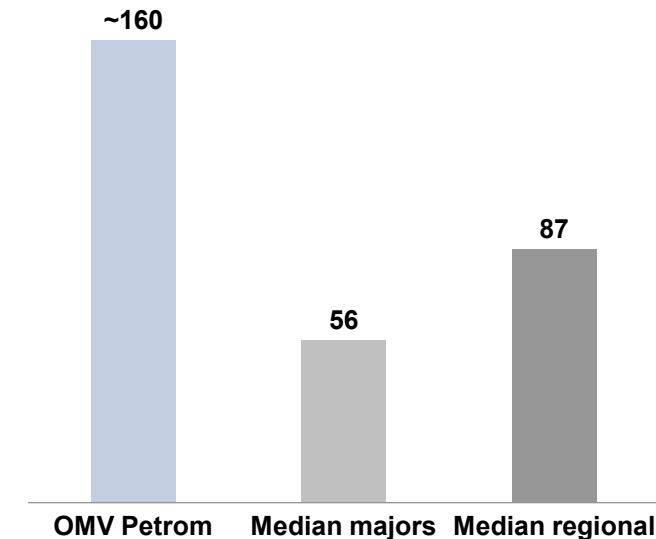
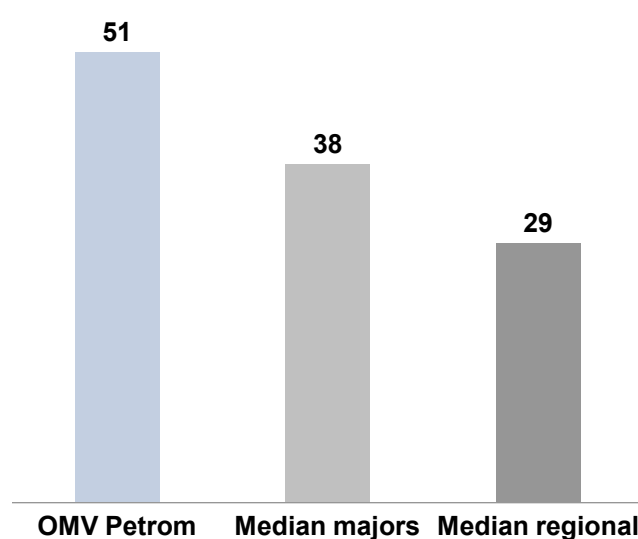
Attractive payout ratios % of OCF², average for 2021-2025

Competitive 2022-2025 TSR³ %

Dividend, RON bn



■ Progressive base dividend ■ Special dividend



¹ Dividend yield calculated based on the closing share price as of the last trading day of the respective year; ² Operating cash flow; ³ TSR = total shareholder returns; peers list: BP, Eni, Equinor, Galp Energia, MOL, Neste Oil, Orlen, Repsol, Romgaz, Shell, TotalEnergies, and Tupras

Resilient growth in energy, value and dividends

Advanced
execution for the
largest offshore
gas resource¹
in the EU

—
>70%
gas²

Growing cash
flows and
profitability

—
~15%
ROACE³

Highly
competitive
dividend
distributions⁴

—
~50%
of OCF⁵

Transforming
for a lower
carbon future at
adjusted pace

—
~25%
of investments⁶

¹ In execution phase as of September 2026; ² weight in total hydrocarbon production in 2030; ³ by 2030; ⁴ distributions include base and special dividends; ⁵ cumulated by 2030; ⁶ in low and zero carbon projects out of EUR 11 bn total gross investments



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Challenging landscape and volatile energy markets



Disruptive regional and global events impacting our operating environment

- **Energy crises**
Higher commodity prices
- **Regulatory interventions**
Volatile macro environment
- **Geopolitical challenges**
Energy supply disruptions
- **Re-design of energy supply to Europe**
Accelerated shifts in global energy markets
Unprecedented volatile commodity prices

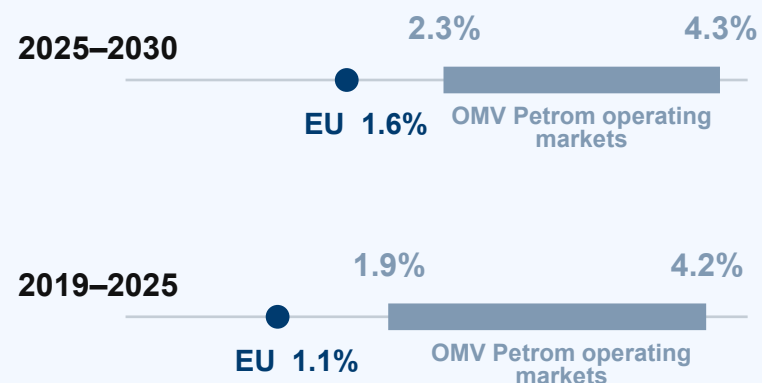
European energy environment is going through significant transformation

- Stronger focus on **energy security**
- Energy transition continues **at uneven and overall slower pace**
- Accelerated **renewables and power storage uptake**
- Heightened focus on **competitiveness**
- **Maturing new technologies will impact the pace of energy transition**

..... **Uncertainty anticipated to persist**

Strong GDP growth on paced transition

GDP per capita CAGR %



GDP per capita in our operating region set to grow faster than EU¹

Demand² in our operating region

	2025 vs 2019	2030 vs 2025	2040 vs 2030
Gasoline	↗ +26%	↗ +12%	↘ -10%
Diesel	↗ +19%	↗ +2%	↘ -20%
Jet	↗ +22%	↗ +20%	↗ +15%
Gas	↘ -9%	↗ +20%	↘ -10%
Power	↘ -10%	↗ +15%	↗ +20%
thereof renewable ³	↗ +73%	↗ +150%	↗ +50%
thereof EV (TWh)	n.m.	↗ +14	↗ +6 ⁴
SAF (kt)	↗ +15	↗ +45 ⁵	↗ +320 ⁵

¹ International Monetary Fund, World Economic Outlook Database (April 2026), World Bank (July 2026), and internal estimates;

² Internal calculations based on various internal and external estimates; ³ Wind and solar production, assuming no export;

⁴ 2025 demand: ~0.2 TWh; ⁵ Total 2025 demand: ~15 kt, est. 2030: 60, est. 2040: 380

Volatility of commodity prices expected to persist



Price assumptions 2027 – 2030

Brent oil
USD/bbl

~75
(prev. 80)

Indicator refining margin
USD/bbl

8 – 9

TTF hub price
EUR/MWh

25 – 35
(prev. 25-30)

Power price
EUR/MWh

100 – 110¹
(prev. 120 – 130)

CO₂
EUR/tCO₂

85 – 110
(prev. 110 – 140)

Increased geopolitical
and regulatory risks

Changes and disruptions
to supply chains

High inflationary
pressure

¹ Baseload prices, also relevant for captured power prices for wind, while solar captured prices range between 60-70 EUR/MWh

Strategic direction unchanged, while adapting to market and transition pace

- Advancing Neptun development and pursuing further Black Sea exploration, while optimizing the traditional E&P business
- Integrated power portfolio expanded regionally and enhanced with storage capacities, supported by regional trading and commercial optimization
- Mobility of the future is based on highly performing traditional business and developing further with biofuels and e-mobility
- Strong cash flow generation to support transformation and attractive shareholder returns
- GHG targets as well as CAPEX for the less mature low and zero carbon technologies adjusted in line with market and energy transition pace





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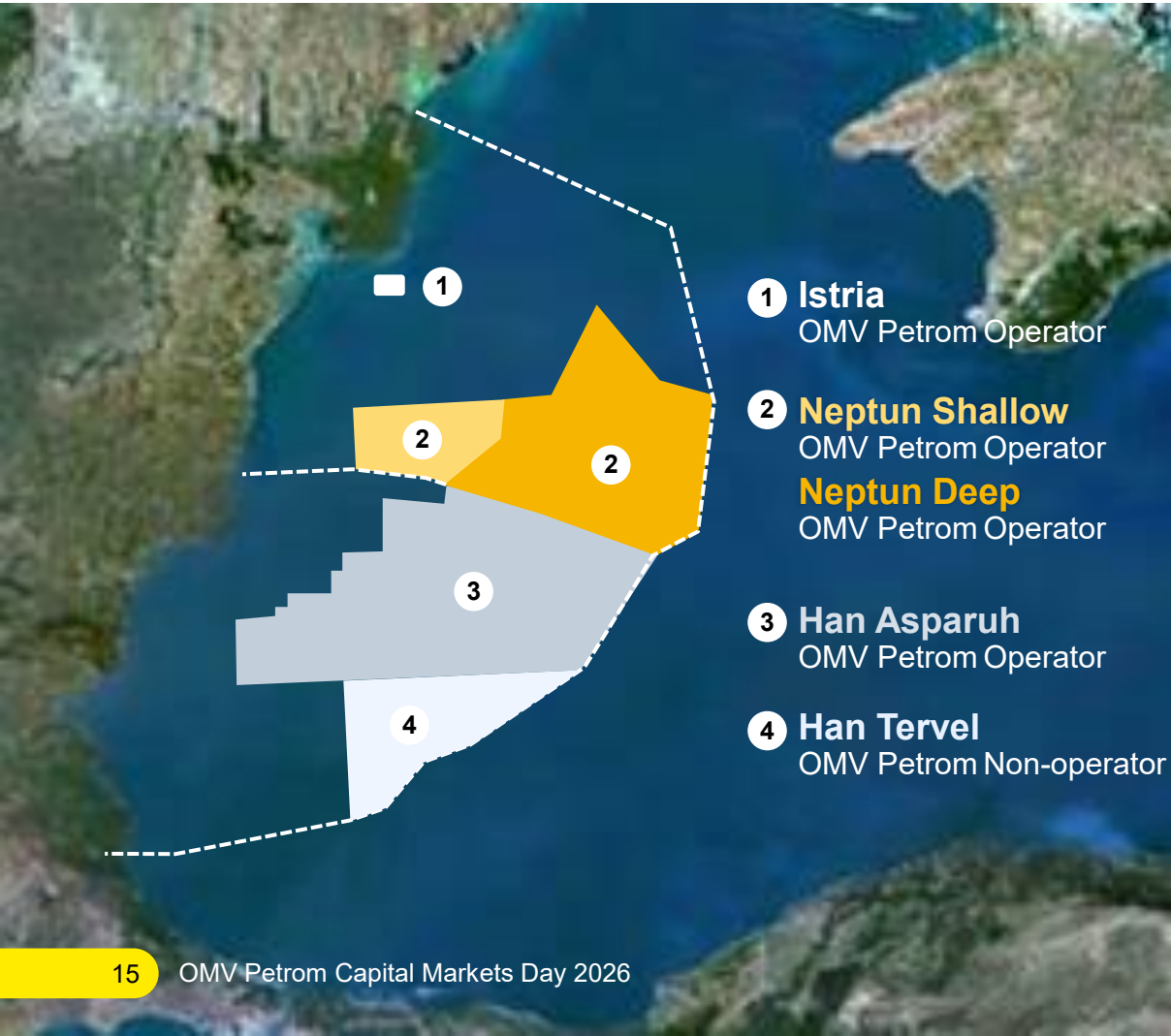
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Key
messages

Grow regional gas in the Black Sea

Building a strong position in a proven and emerging gas play



In the Black Sea we have built a portfolio of opportunities:

- > **Production**
Petromar (>12 kboe/d¹), Romania
- > **Development**
Neptun Deep (~70 kboe/d²), Romania
- > **Exploration**
four blocks in Romania and Bulgaria

¹ OMV Petrom offshore production, oil and gas in 2025; ² Neptun Deep production at plateau

The largest offshore project in the EU

Neptun Deep first gas expected in the first half of 2027

Key facts

Development CAPEX ¹ EUR bn	~4
Plateau production nearly 10 years kboe/d ^{1,2}	140
Production cost ³ USD/boe	~3
Estimated recoverable volumes ¹ mn boe	700
IRR Life of field ³ %	>12
EBIT ⁴ EUR bn	~0.5



A game-changer project:

- 4 years to market, 2 years faster than industry average⁵
- Plateau production to be reached by end-Q3 2027
- Fully remotely operated production platform (unmanned)
- 2.2 kg CO₂/boe GHG emissions, eight times lower than the industry average⁶

Benefits for Romania:

- One of the largest energy projects in the last decades in Romania
- Consolidates the country's position as the EU largest gas producer and as net exporter
- Significant contributions to Romania's GDP

¹ Project view; ² equivalent to ~8 bcm/year or 75 TWh/year; ³ OMV Petrom's perspective; life of field; ⁴ Contribution to Group Clean CCS EBIT, in a year with full plateau production; ⁵ IEA, September 2025, The Implications of Oil and Gas Field Decline Rates – Analysis – IEA; ⁶ IOGP Environmental performance indicators issued in January 2026 and reflecting IOGP member companies' performance



Neptun Deep

Continue exploration for new opportunities

EUR 100 mn

offshore exploration
expenditures by 2030¹

2-3 wells

to explore new
prospects by 2030



Strong offshore capabilities developed in the last decade:
from operator in shallow water to deep water operator in exploration, projects and soon to be operations

➤ **Romania** - from development to exploration drilling

- **Neptun Deep:** Anaconda well in 2026/27 (deep waters, 50%, operator)
- **Neptun Shallow:** potential Cormoran well in 2027 (shallow waters, 100%, operator)

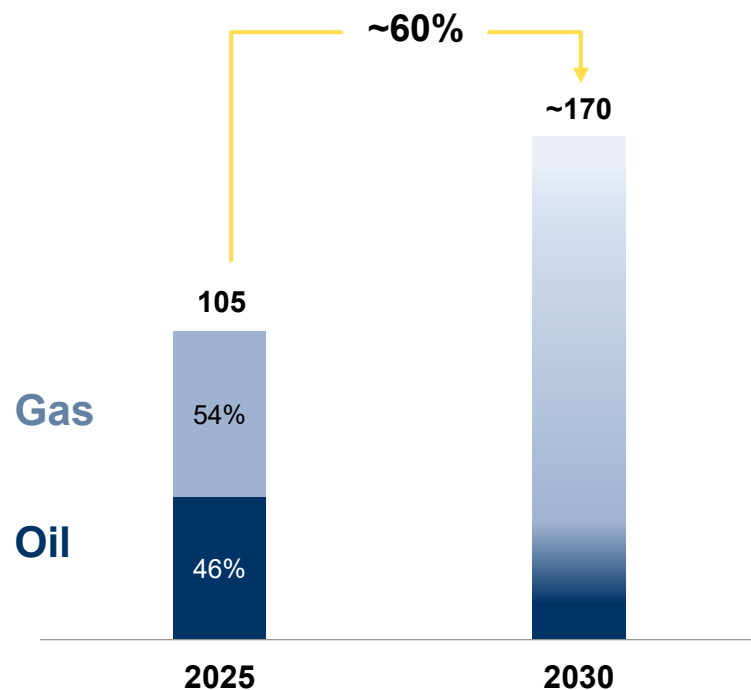
➤ **Bulgaria** - expanding our exploration portfolio:

- **Han Asparuh:** assessing options (deep waters, 45%, operator)
- **Han Tervel:** commitment to acquire 3D seismic (deep waters, 25%, non-operator)

¹ H2/26 – 2030 total offshore exploration expenditures

Neptun Deep volumes upgrade E&P portfolio

Hydrocarbon production¹ kboe/d



	2025	2030
Workovers p.a.	542	~500
New wells p.a.	31 ²	30 - 50
Facilities and wells modernized and automated	88%	>95%
Production cost USD/boe	18	~9 ³
CAPEX EUR mn	1,120	~500 ⁴

Exploration onshore:

- ~EUR 100 mn exploration expenditures⁵
- ~2 exploration wells per year⁶

¹ Subject to extension of traditional production licenses, as agreed in principle with the State in December 2025; ~170 kboe/d (before potential divestments estimated at 10-15 kboe/d by 2030);

² Excluding the wells drilled within production enhancement contracts (one well in 2025) and the Neptun Deep development wells drilled in 2025; ³ considering total hydrocarbon production, after potential divestments and including Neptun Deep volumes; ⁴ 2027-2030, average annual investments for traditional E&P segment; ⁵ H2/26 – 2030 total onshore exploration expenditures; ⁶ on average per year, including exploring near field opportunities.

Neptun Deep gas to contribute to regional security of supply



Neptun Deep

- Romania expected to become net exporter
- Infrastructure in place to export to neighboring importing countries
- Marketing activities ongoing

Expand regional marketing operations

- Expertise and access to markets and trading platforms and diversification, **strengthening cross market optimization**
- **Business to Business**
 - In Bulgaria, since 2024
 - In Hungary, since 2025

Total Group gas sales²

>70 TWh/year by 2030, including Neptun Deep

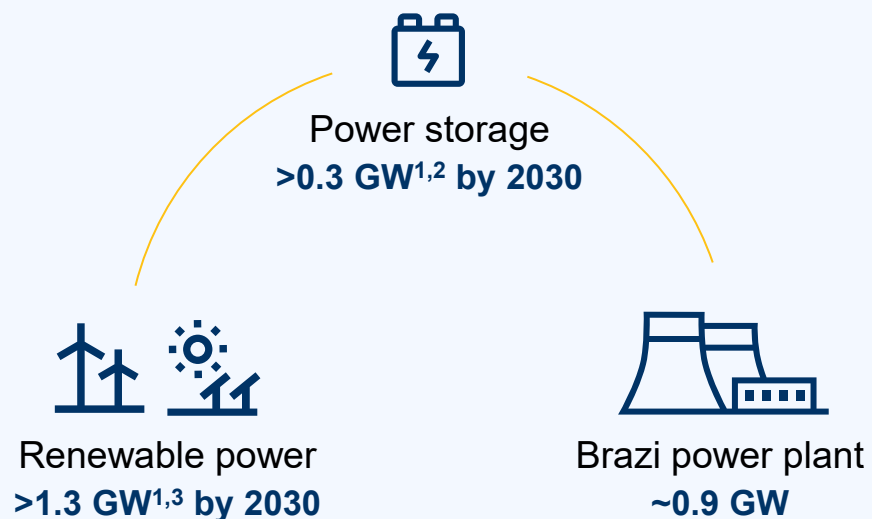
Romania + 6 countries

regional presence³

¹ Net importer; ² target by 2030; includes gas quantities used in Brazi power plant and other internal consumption; ³ OMV Petrom's regional presence at the end of 2025: Romania, Bulgaria, Greece, Germany, Hungary, Moldova, Ukraine

Building a regional integrated and flexible power portfolio

Integrated power system



	2025	2030
Net electrical output ¹ , TWh/year	4.7	>6 (unchanged)
Green power sales, % in total	-	~30 (unchanged)

Assets power generation

Expand portfolio from conventional assets based in Romania to a **regional power asset portfolio**

- Maintain **Brazi power plant** position on the power market
- **Renewable power: >1.3 GW^{1,3}** wind and solar projects in various stages, operational by 2030

Integration & flexibility

Deploy **power storage** to enhance flexibility and resilience of our integrated power system:

- Create **additional value streams** by adding power storage
- Increase **flexibility**, by smoothing renewable output fluctuations
- **~180 MW^{1,4} storage capacity** already secured

Customer focused

- Broaden **power value proposition** with innovative solutions: corporate PPAs and automated trading to better serve customers and increase returns
- Expand **regional market** presence by enlarging cross-border trading activities

¹ Net to OMV Petrom.

Notes 2-4 refer to figures including partnerships; ² >0.6 GW; ³ >2.5 GW; ⁴ ~340 MW

~EUR 1 bn^{1,2} investment to support our renewables portfolio

Capacity net



Production net



Storage capacity net



2025 2028 2030 target

Investment rationale

- **Integrating** renewables, power storage and flexible gas generation
- Strong renewable **asset base** in Romania and Bulgaria
- **Multiple value streams**, capturing flexibility driven uplift
- **Capital-efficient growth** with diversified funding and **double-digit IRRs**
- **~EUR 100 mn** contribution of RES projects to EBIT in 2030

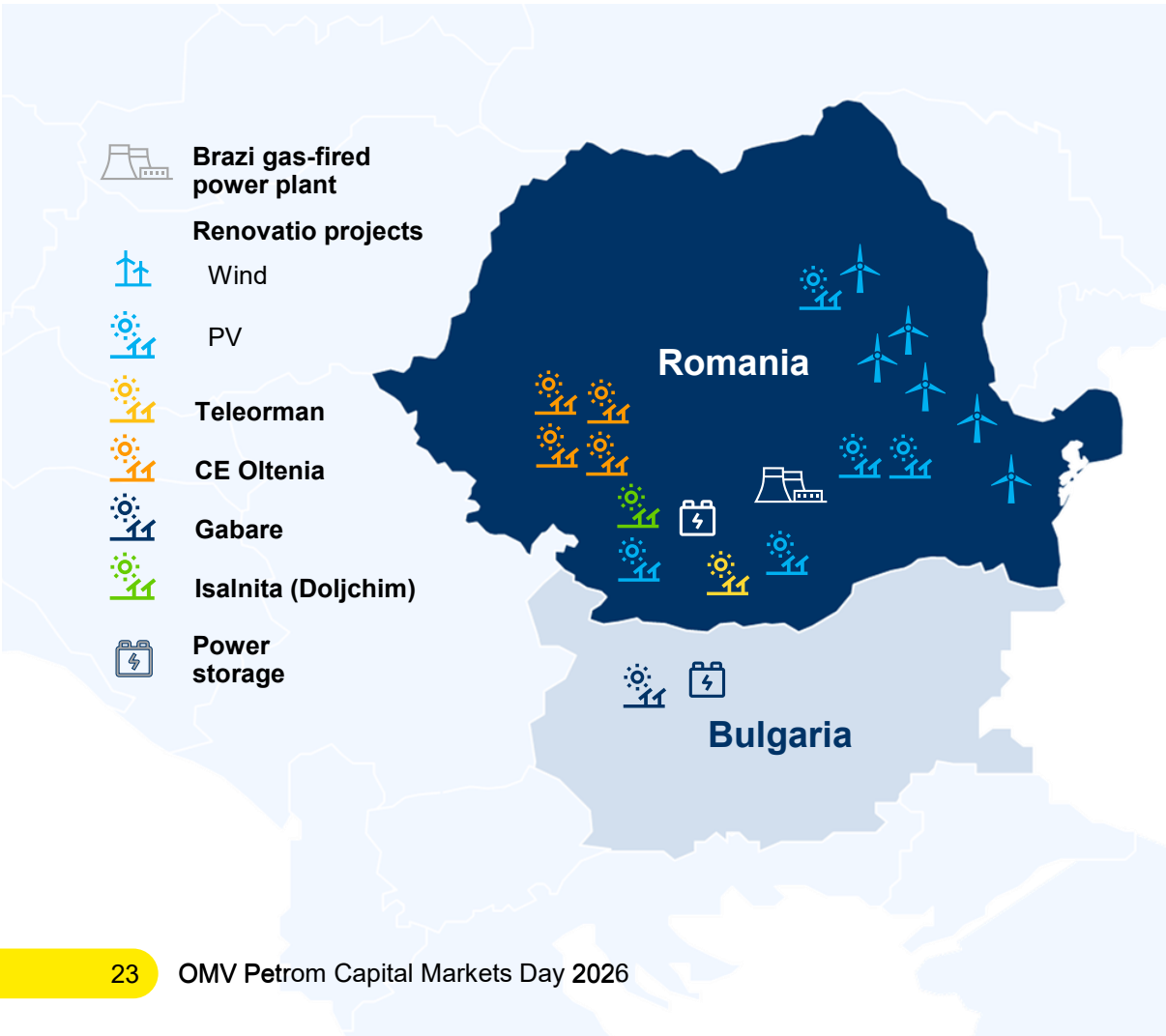
What we delivered

- **~0.8 GW** in development^{2,7}, thereof: ~0.7 GW under construction^{2,8}
- **>50 MW** operational^{2,9}
- **~0.06 TWh** yearly electrical output^{2,10}
- **~180 MW power storage** FID-ed^{2,11}
- **~EUR 300 mn CAPEX**¹²

¹ Total for 2022-2030, of which ~30% as shareholder loans; ² net to OMV Petrom;

Notes 3-6 refer to 2030 targets including partnerships; notes 7-9 and 11 refer to figures including partnerships as of 31.08.2026: ³ capacity >2.5 GW; ⁴ thereof ~45% PV, ~55% wind; ⁵ >4.7 TWh; ⁶ >0.6 GW; ⁷ ~1.5 GW; ⁸ >1.2 GW; ⁹ 90 MW; ¹⁰ 2025 production: ~0.1 TWh; ¹¹ 340 MW; ¹² spent by end-June 2026, not including shareholder loans.

More than 60% of projects FID-ed



Joint development with our partners

- **CE Oltenia¹**
550 MW² PV, 50% interest
- **Renovatio³**
~980 MW² wind, 180 MW² PV, 2 MW hydro², 50% interest thereof, 90 MW operational⁴
- **Gabare (Bulgaria)³**
415 MW² PV + 320 MW² BESS, 50% interest
- **Teleorman**
710 MW PV, 100% interest (farm-down to 50% in progress)

100% owned projects

- **Isalnita (Doljchim)**
89 MW PV + ~20 MW BESS
- **Projects on OMV Petrom sites**
>10 MW PV

**2/3 solar
1/3 wind**

Total > 2.5 GW
capacity by
2030

¹ Joint operation; ² Including partnerships; ³ Joint venture; ⁴ as of 31 August 2026

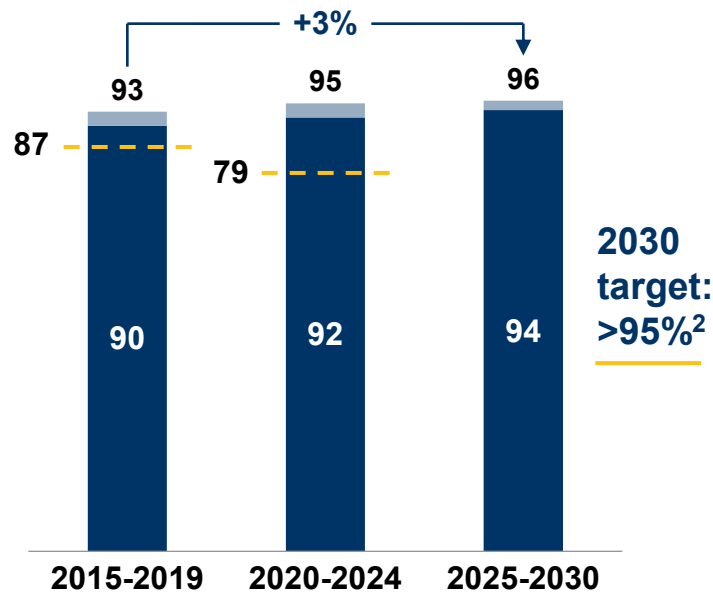


Progress on Strategy 2030

Renewable Power

High performing refinery: adapted to capture market opportunities

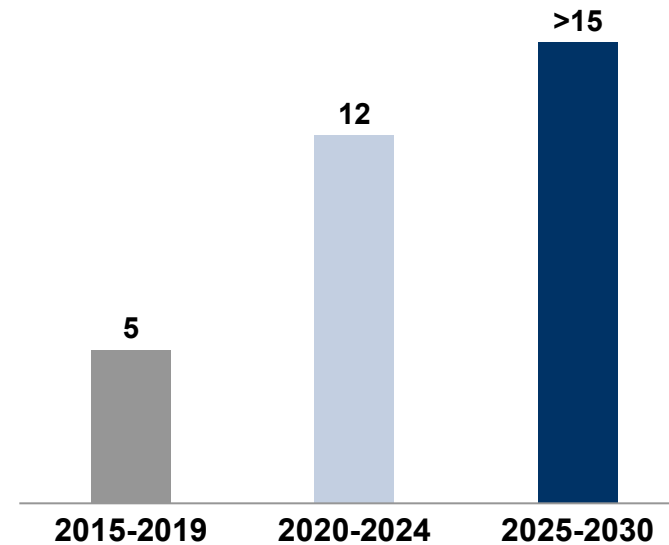
High reliability: above average refinery utilization¹
%



— EU-16 average utilization, OPEC Monthly Reports

■ Average refinery utilization including years with planned turnarounds

Increased flexibility: ability to process a wider imported crude basket
Number of processed crude types



Long-term competitiveness:

- Capturing integration benefits
- Maintaining high utilization rate
- Focus on improving cost efficient operations...

~EUR 100 mn/year³
CAPEX

Up to
EUR 100 mn
2030 EBIT⁴

... while pursuing a **gradual scaling** of the **biofuels value chain**

¹ Average utilization of the crude distillation unit, excluding years with planned turnarounds; ² Refers to crude distillation unit, average for 2027-2030, excluding years with planned turnaround (i.e. 2027); ³ 2027-2030 average, referring to traditional refining business only; ⁴ Contribution of traditional refining business to Group Clean CCS EBIT

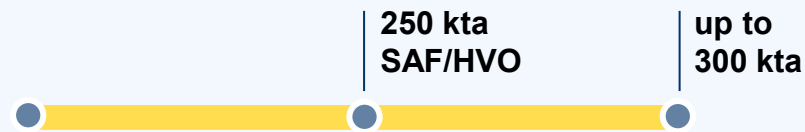
Becoming the first major producer of renewable fuels in SE Europe

2030 objectives

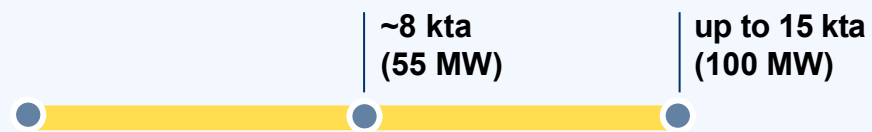
>10%
IRR

~ EUR 130 mn
2030 EBIT¹

Biofuels



Green H₂



2025

2028

2030 target

Investment rationale

- **Increasing biofuels demand** in our region
- **EU funding availability**
- **Integration opportunities:** green H₂ production supports compliance with **RFNBO² targets** and **supplies SAF/HVO** unit
- Build on already **strong aviation footprint**

What we delivered

EUR 750 mn program³ in advanced stage:

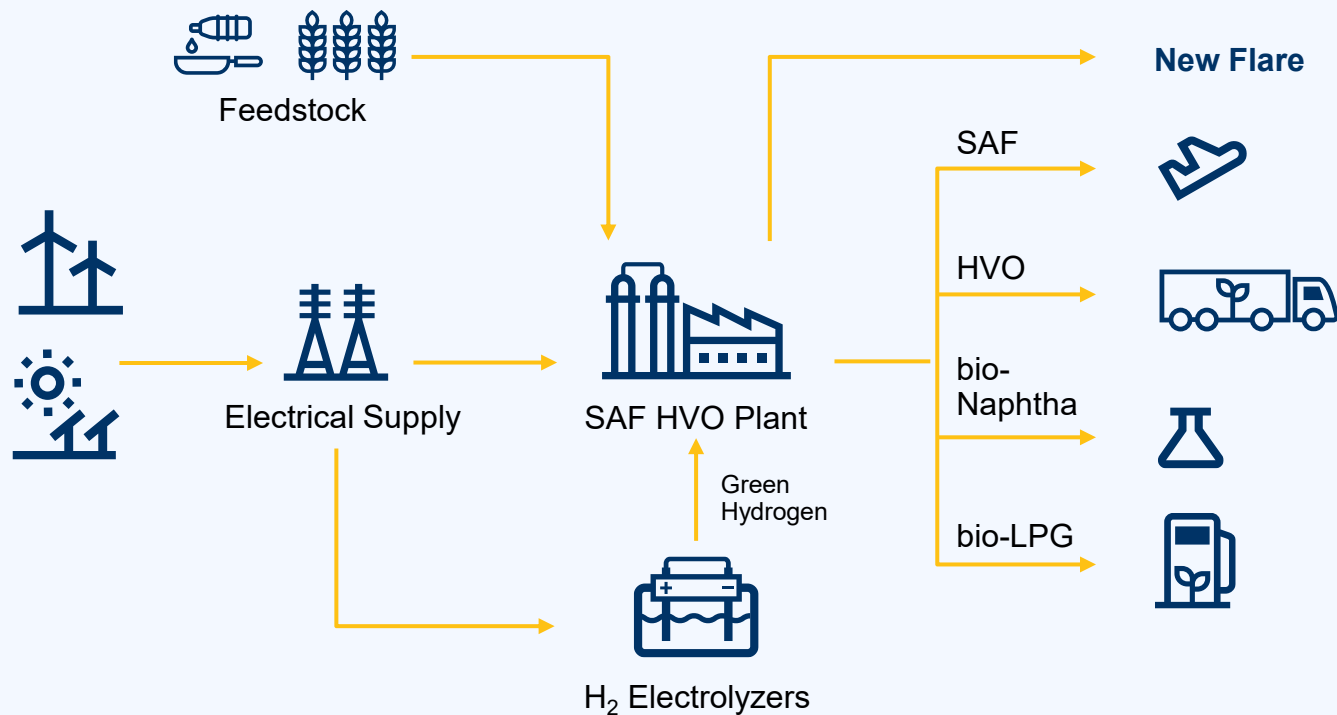
- 250 kta plant⁴ for SAF/HVO production in development
- 55 MW green H₂ electrolyzers almost completed

CAPEX spent⁵

- ~ EUR 270 mn, of which ~ EUR 50 mn EU funding

¹ Contribution to Group Clean CCS EBIT; ² RFNBO = Renewable Fuels from Non-Biological Origin; ³ Does not include infrastructure enablers; ⁴ Flexible unit with base case annual production mix of 90kt SAF, 130kt HVO and 30kt bio-naphtha and bio-LPG; ⁵ Gross CAPEX excluding infrastructure enablers spent by end June 2026; EU funds received as of end-September 2026

On track and within budget, strong safety performance



Infrastructure enablers:

- New electrical power system
- New flare system and related infrastructure
- New storage tanks for finished products

Shifting from engineering to construction and integration

- **>65% total progress¹**
- Feedstock secured **>80%**
- Pre-marketing: **~25%** of production placed
- **Safety: ~2 million man-hours** without LTI²
- **SAF HVO plant**
 - Main civil works and heavy lifting successfully completed
 - Construction continues to advance across all project areas
- **Green H₂ production units**
 - All electrolyzer modules delivered and installed
 - Mechanical completion of all utility systems achieved

¹ as of end-September 2026, full program including infrastructure enablers;

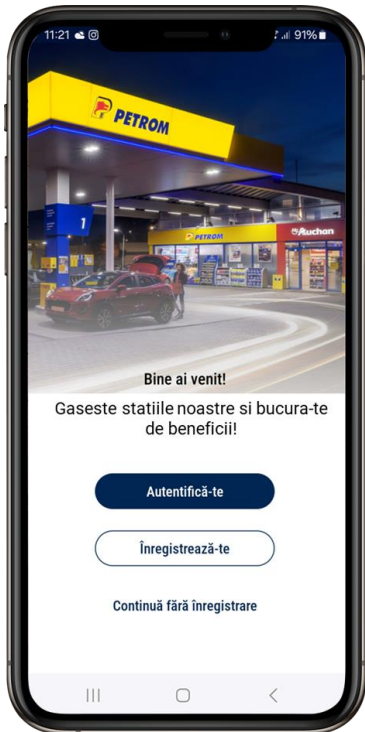
² Lost time from injuries, as of end-September 2026



Progress on Strategy 2030

Sustainable Fuels

Dual brand strategy and customer focus drive value increase



2030 targets well underway

Increase throughput per filling station to ~6 mn l

- How: network optimization, strategic corridors
- 2025 progress: ~6 mn liters, +21%¹

Double non-fuel margin² to reach EUR 160 mn

- How: strong convenience partnerships, product innovation
- 2025 progress: EUR ~140 mn, +76%

Increase profitability per filling station by 20%^{2,3}

- How: loyalty apps, digital operations
- 2025 progress: +21%

~60% of R&M EBIT in 2030⁴

Continue focus on

- **Network optimization** and expansion in high traffic areas
- **Non-fuel business:** strengthen convenience partnerships and continue product innovation
- Extend **digital tools** initiatives



¹ Vs 2020, in Romania; ² Vs 2020, data refer to OMV Petrom operating region which includes Romania, Bulgaria, Moldova and Serbia; ³ Excluding EV contribution; ⁴ Referring to traditional retail business, contribution to R&M Clean CCS EBIT

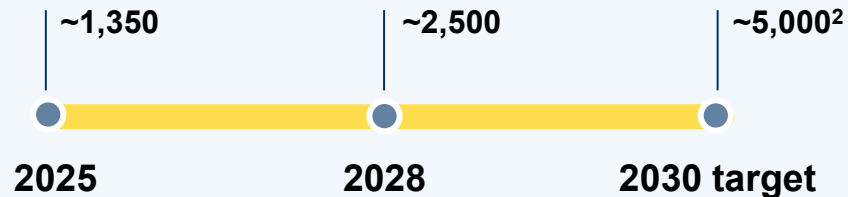
Consolidating our position as 1st choice mobility provider in Romania

2030 objectives

~EUR 0.2 bn
CAPEX¹

>10%
IRR

No. of charging points (CPs)



Our next focus:

- Adapting pace to market development
- Expanding implementation in 3rd party locations
- Capturing further EU funding opportunities

Investment rationale

- **Capture early mover advantage:** targeted locations and high-margin segments
- **Leverage integration** with internal renewable power portfolio
- **Generate synergies** with non-fuel business in own locations

What we delivered

- Became the largest e-mobility provider in **Romania via M&A and organic growth**
- Installed **CPs in our best locations:** urban and high traffic areas, EU project along TEN-T corridor
- **~80%** of operational chargers are **fast and ultra fast**
- **CAPEX spent³:** ~EUR 80 mn, of which ~EUR 10 mn EU funds

¹ Gross CAPEX allocation for the period 2022-2030, of which EUR 12 mil EU funds; ² charging points (public and private) in our operating region, including fast and ultra fast charging points, as well as wall boxes (fast DC recharging point 50 kW ≤ P < 150 kW, ultra-fast DC recharging point 150 kW ≤ P < 350 kW); ³ by end of June 2026



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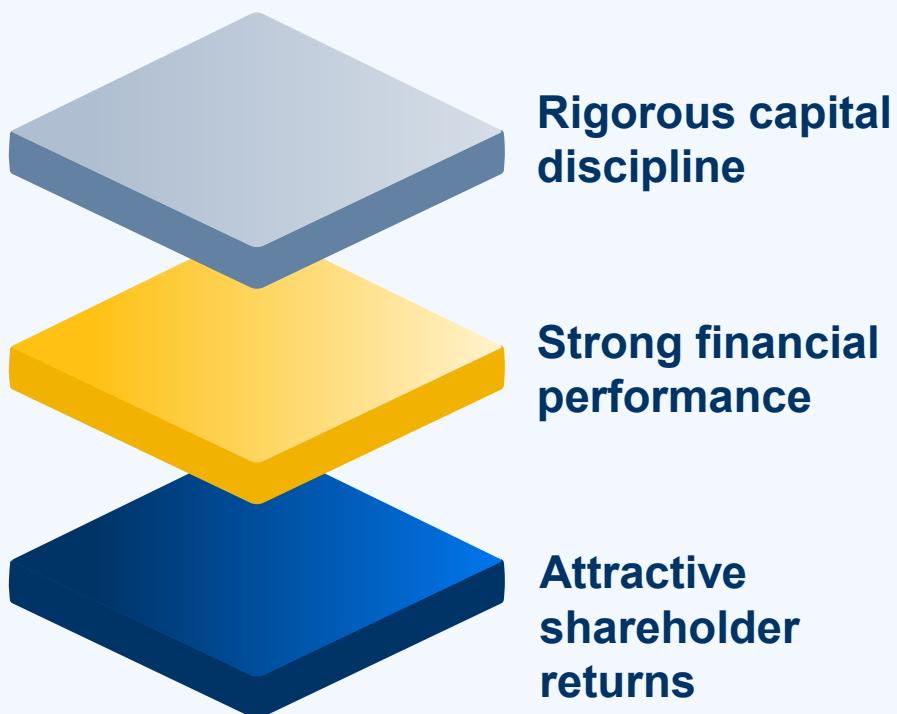
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Capital discipline enabling strong financial performance and attractive shareholder returns

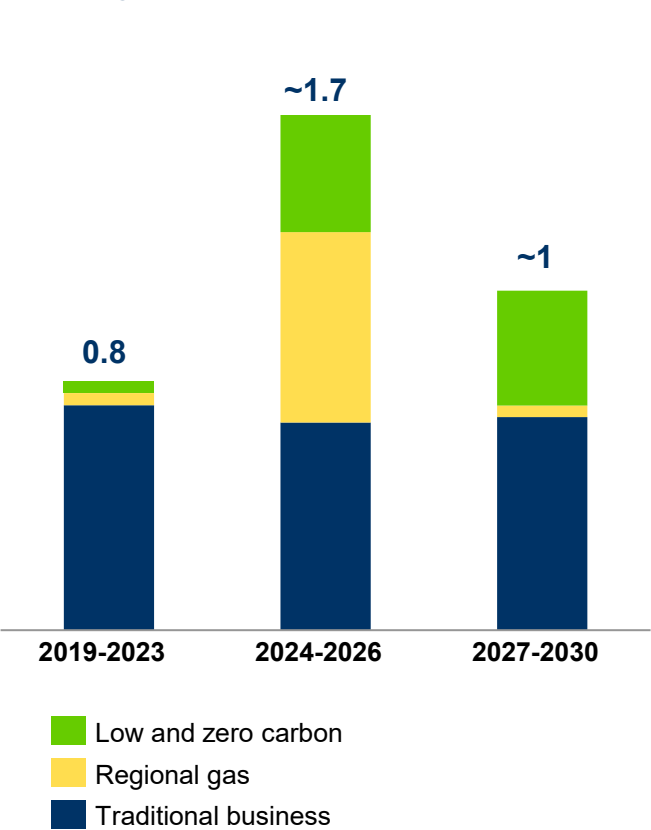


CAPEX ¹ 2022–2030	~EUR 11 bn
for low & zero carbon business	~EUR 2.7 bn
Clean CCS EBIT 2030	>EUR 1.5 bn
ROACE by 2030	~15%
Base dividend growth	5%–10% p.a.
Yearly OCF allocated to dividends	40%–70%
Gearing ratio ²	<20%

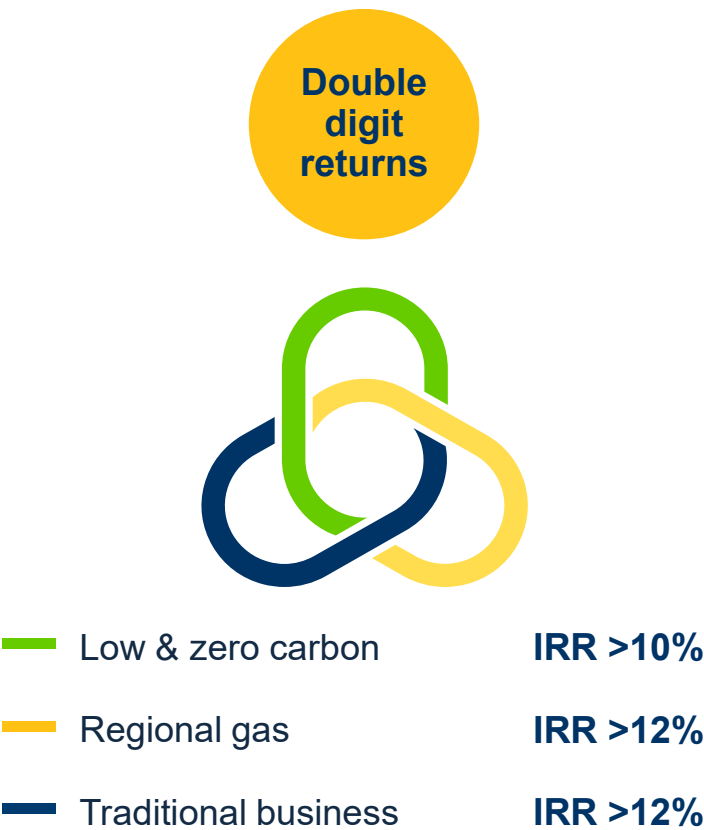
¹ Gross CAPEX cumulated for 2022-2030; ² Single year rate

Rigorous capital discipline underpins strategy

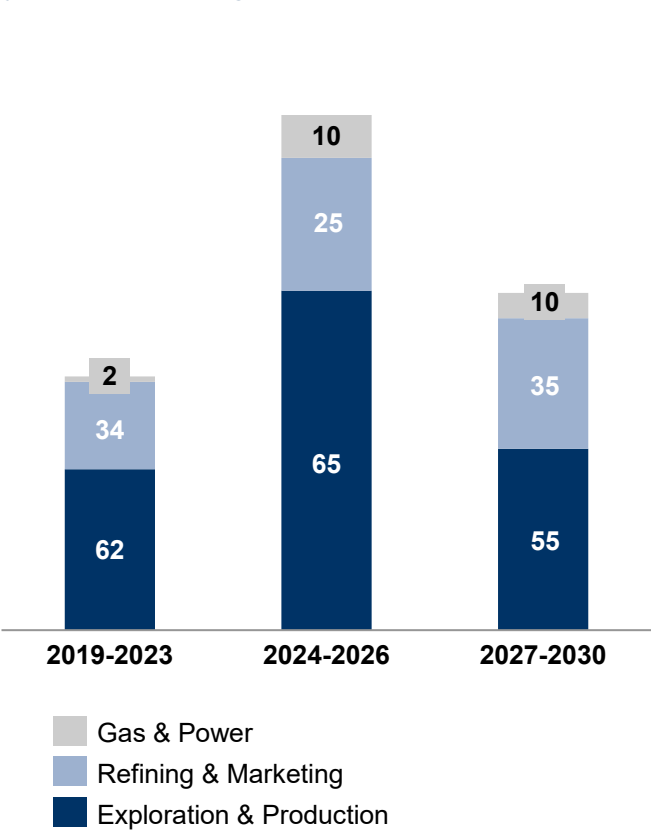
Average annual CAPEX
By strategic pillar · EUR bn



Return thresholds

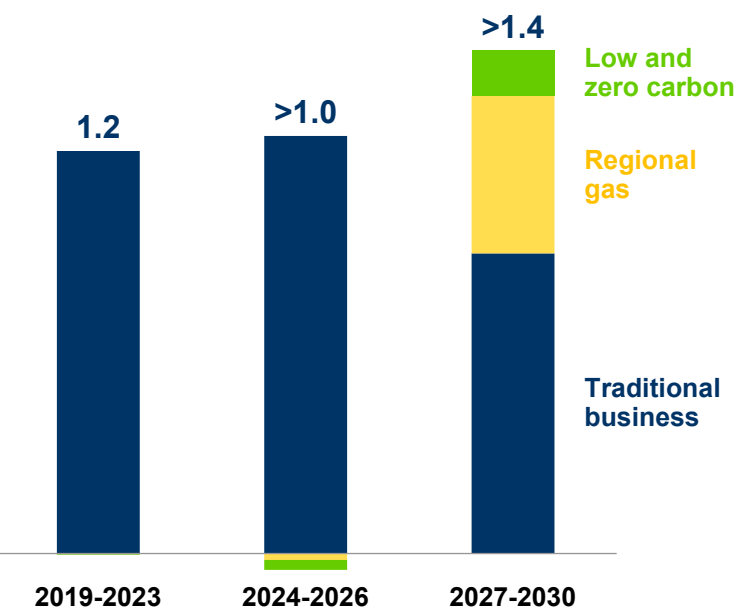


Average annual CAPEX
By business segment · %

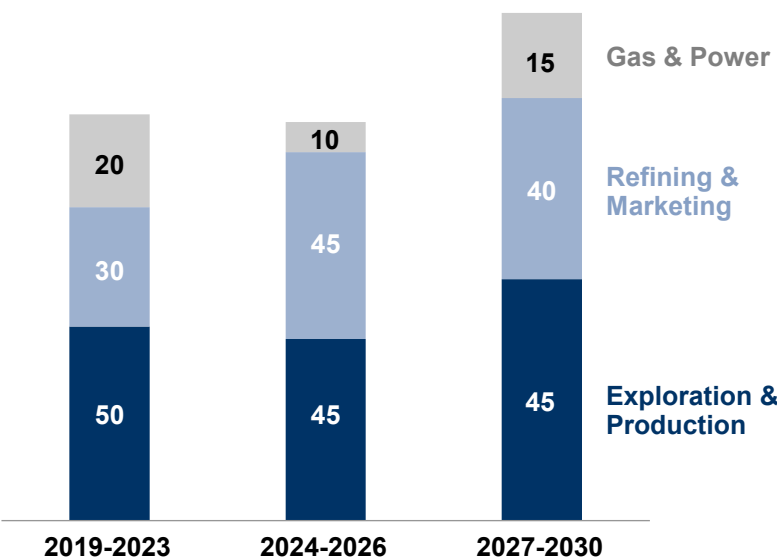


Delivering strong financial performance across the business

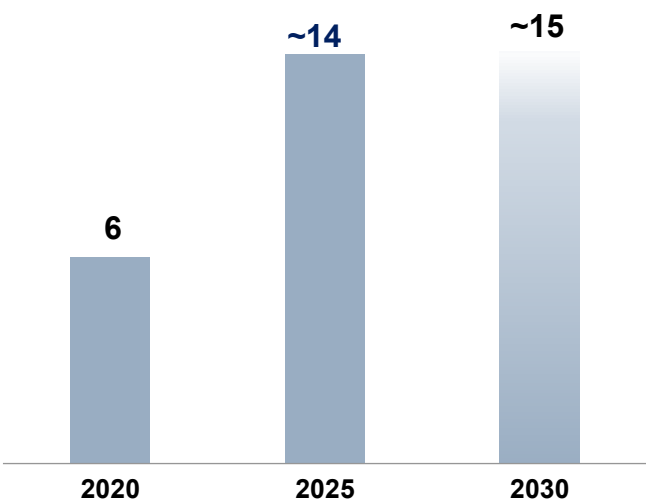
Average annual Clean CCS EBIT
per strategic pillar, EUR bn



Average annual Clean CCS EBIT
by business segment¹, %



Clean CCS ROACE
%



¹ Adjusted for solidarity contribution recorded in 2023

Efficiency programs continued to strengthen cost competitiveness

How value is delivered

Simplification and automation

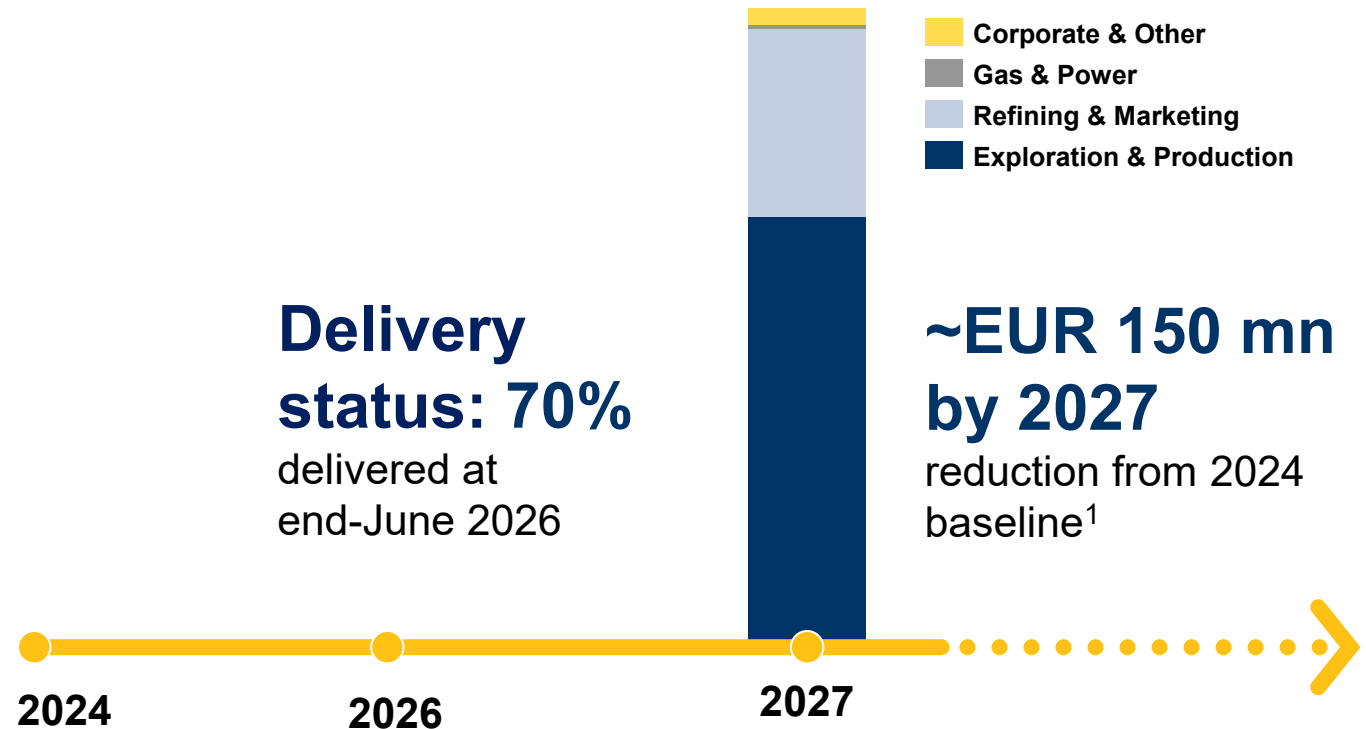
- Processes
- Assets
- Overheads
- Fit-for-purpose operating model

Leverage AI and Data

- Productivity improvement
- Efficient processes

Maximize integration value

Combine productivity, cost, capital and performance levers across business segments



¹ Baseline: 2024 operating costs plus a share of variable costs; impact in EBIT

Growing base dividends, additional upside

Dividend policy

01 Progressive base dividend

Aligned with financial performance and investment needs, while safeguarding the Company's long-term financial health.

02 Discretionary special dividends

Potentially distributed in a favorable market environment, provided that investment plans are funded.

Strong commitment by 2030

Base dividend

5–10%

increase p.a.

Total dividends (base and special)

~40–70%

OCF¹ yearly range

~50%

OCF¹ average
2022–2030

2030 OCF¹ : EUR >2 bn → HIGHLY COMPETITIVE DIVIDENDS, EUR >0.8 bn

¹ Base case price assumptions, Operating Cash Flow from reference financial year

Our emissions reduction goals

On track to achieve GHG targets, adjusted to energy transition pace

Strategic flexibility on emerging technologies that support energy transition

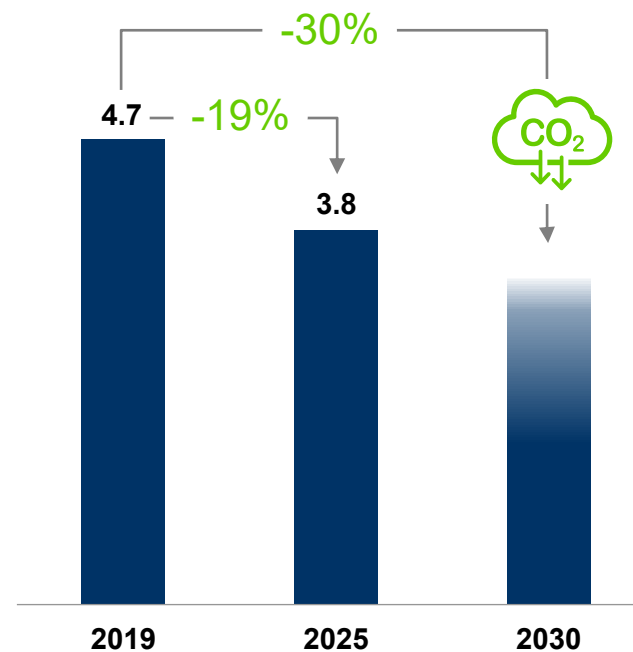
- **CCS:** Explore commercially viable opportunities using our subsurface expertise
- **Geothermal:** Assess potential to enhance renewable products portfolio, leveraging E&P capabilities

Capital allocation was adjusted to support attractive growth options and more mature technologies

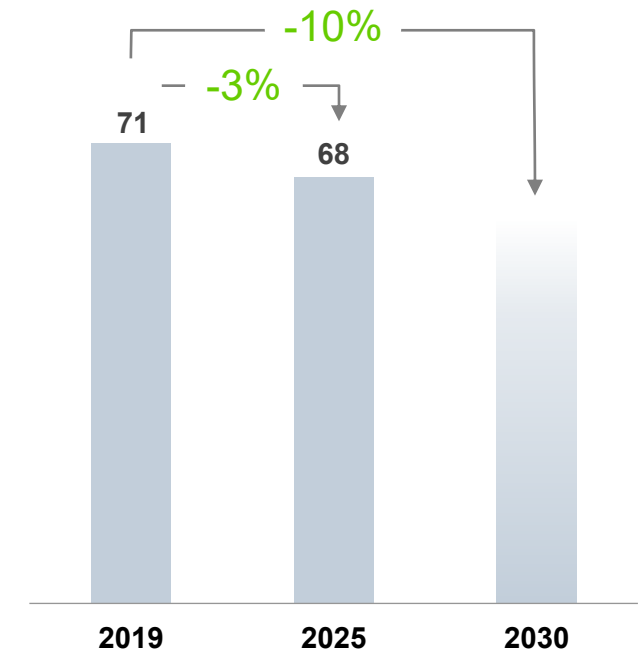
Progress will depend on technology readiness, market demand, supportive policy and funding

<0.2%
methane
intensity
by 2030

Scope 1 – 2 GHG emissions mnt CO₂eq



Scope 1 – 3¹ Carbon Intensity of Energy Supply g CO₂eq/MJ



¹ includes Category 11 for Scope 3 emissions: Use of sold products for energy supply



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Strategy 2030:
Transforming for
resilient growth

2

Energy markets
and macro
environment

3

On track to
deliver our
2030 targets

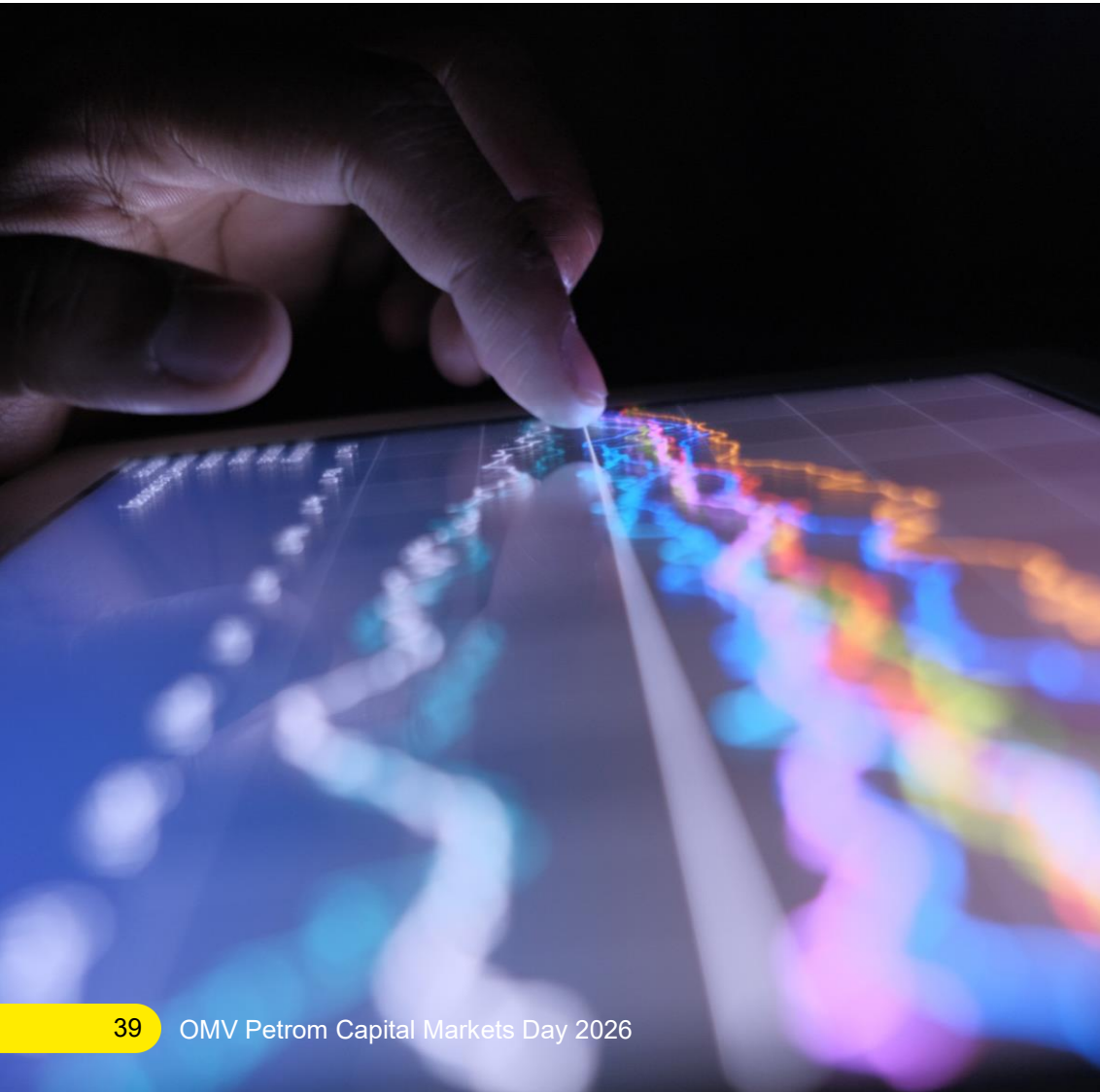
4

Financial
frame

5

**Key
messages**

Resilient growth supports higher cash flows and attractive shareholder returns



Building a resilient energy company

- Game changing Black Sea
- Integrated power
- Sustainable transportation¹

1

On track to deliver our 2030 ambitions, in advanced execution phase

2

Strong increase in operating cash flows

3

Competitive shareholder returns

4

¹ Biofuels: SAF/HVO capacity of 250 kt/year operational in 2028; E-mobility: ~5,000 charging points for EVs by 2030



Q&A session

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Back-up

Sensitivities

EBIT impact in 2028-2030

Sensitivities	Change	EBIT impact
Brent oil price	USD +1/bbl	~EUR +10 mn
OMV Petrom indicator refining margin ¹	USD +1/bbl	~EUR +30 mn
Gas price	EUR +1/MWhh	~EUR 50 mn
Exchange rates EUR/USD	USD appreciation by 10 USD cents	~EUR +60 mn