

Capital Market Story

November 2026

OMV Petrom

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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. 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.

OMV Petrom investment proposition

Resilient growth in energy, value and dividends

Advanced execution for the largest offshore gas resource[1] in the EU

>70%
gas[2]

Growing cash flows and profitability

~15%
ROACE[3]

Highly competitive dividend distributions[4]

~50%
of OCF[5]

Transforming for a lower carbon future at adjusted pace

~25%
of investments[6]

[1] In execution phase as of October 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

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% OCF[1] yearly range

~50% OCF[1] average 2022–2030

2030 OCF[1] : EUR >2 bn → HIGHLY COMPETITIVE DIVIDENDS, EUR >0.8 bn

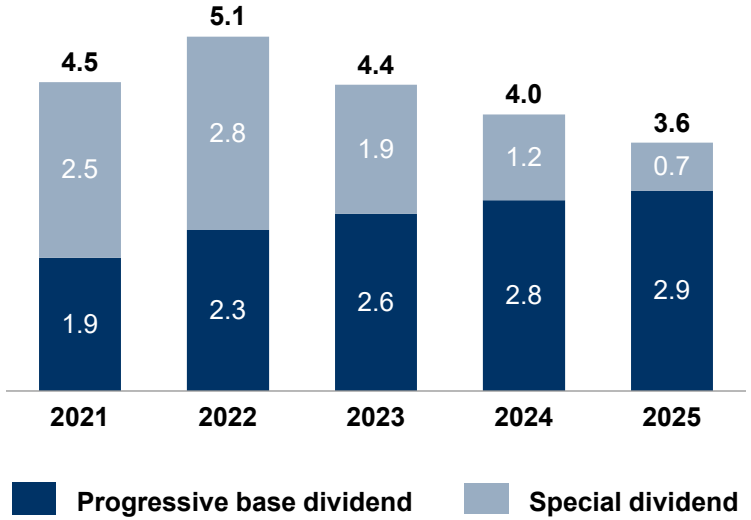
[1] Base case price assumptions, Operating Cash Flow from reference financial year

Competitive dividend distributions and total shareholder returns

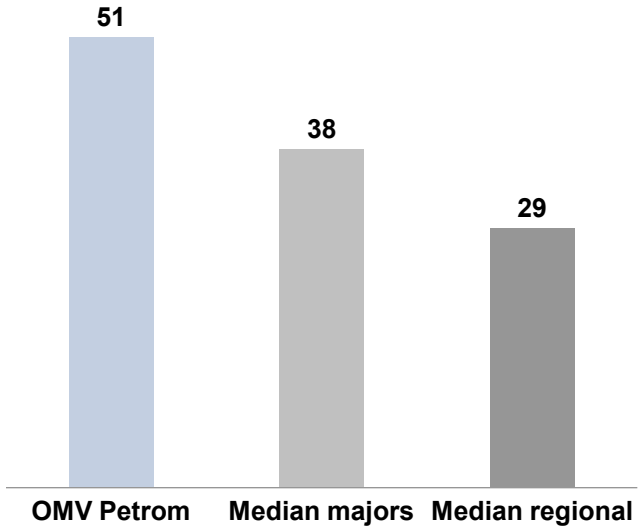
Strong dividend yield[1]
%



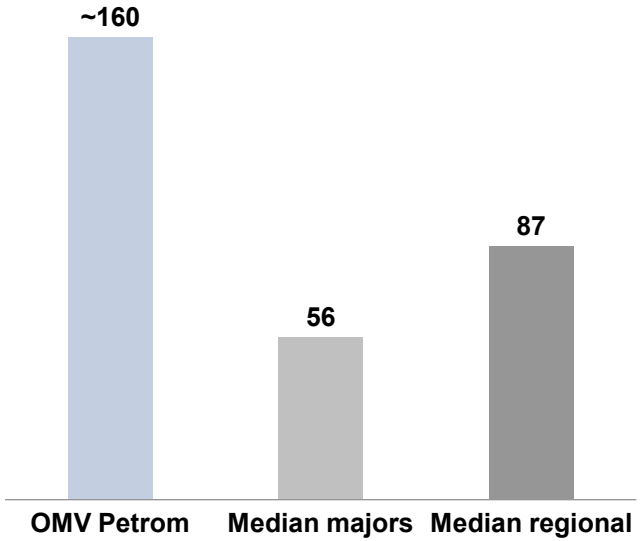
Dividend, RON bn



Attractive payout ratios
% of OCF[2], average for 2021-2025

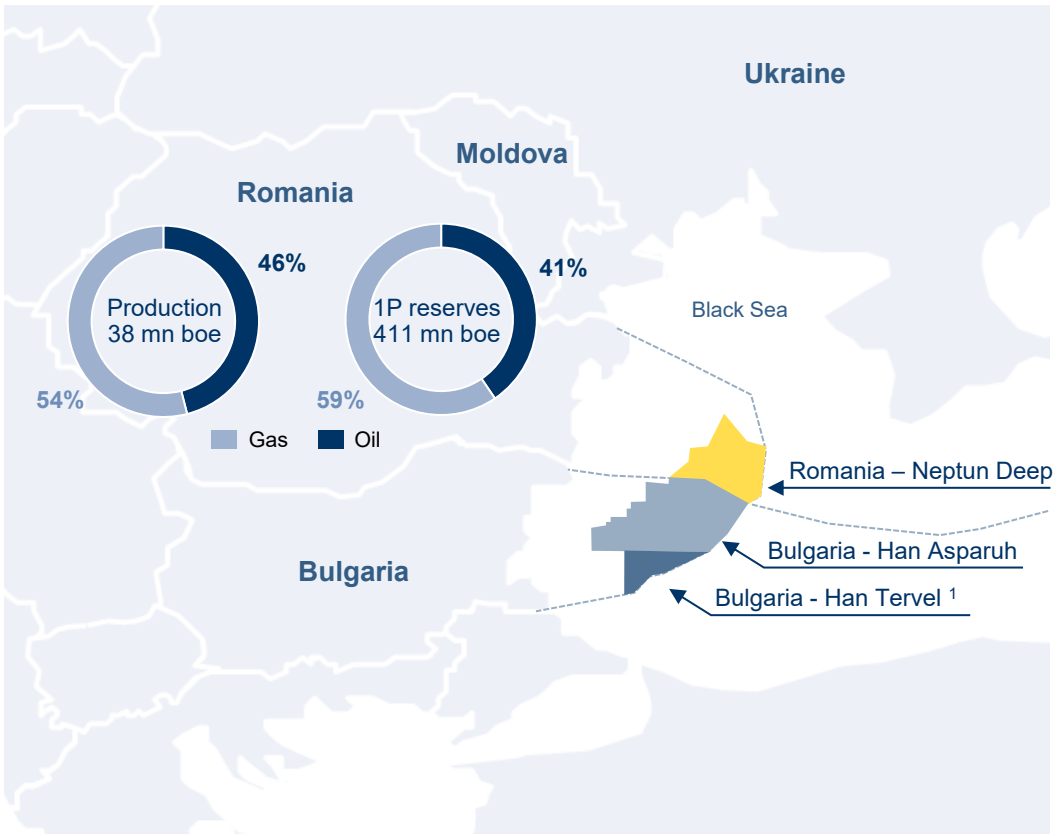


Competitive 2022-2025 TSR[3]
%



[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

Largest integrated energy producer in South-Eastern Europe



Exploration & Production



Refining & Marketing

- Petrobrazi refinery, 4.5 mn t/yr capacity
- 780 filling stations (Petrom and OMV brands)
- ~1,350 EV charging points [2]
- 5.5 mn t total refined product sales (thereof 3.2 mn t retail sales)

Gas & Power

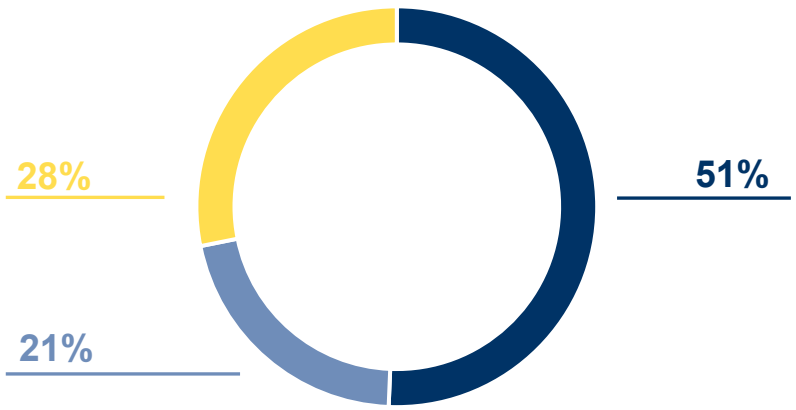
- Brazi gas-fired power plant (capacity 860 MW); net electrical output: 4.7 TWh
- Regional gas sales 4.5 bcm (48.3 TWh)
- Renewable project portfolio[3] (>900 MW under construction and 70 MW operational)

Data refers to 2025; [1] OMV Petrom signed a farm-in agreement for the exploration of the Han Tervel block together with Shell and TPAO in March 2026; [2] Charging points for electric vehicles, own and in partnerships; [3] One of the largest portfolios of renewable energy projects, under development, in Romania and Bulgaria (Gabare project, acquisition of a 50% stake in 2025)

OMV Petrom - the Romanian listed company with the largest market capitalization as of end 2025

OMV Petrom S.A. shareholder structure[1]

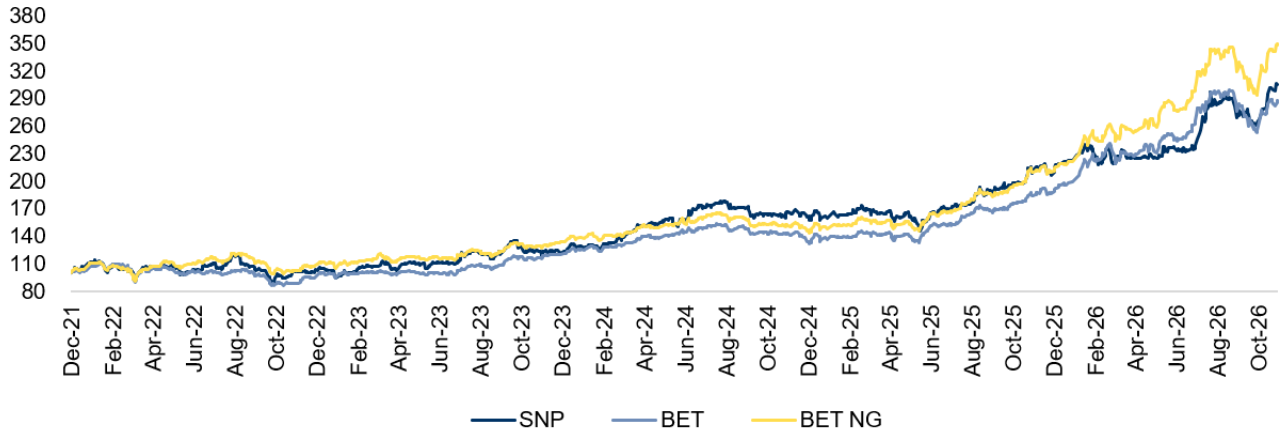
%



- **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 Dec 2021 = 100



Share information

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

[1] As of October 31, 2026; [2] Shareholder since December 2004; [3] Premium tier on the Bucharest Stock Exchange; [4] Rebased quotations on the Bucharest Stock Exchange; unadjusted



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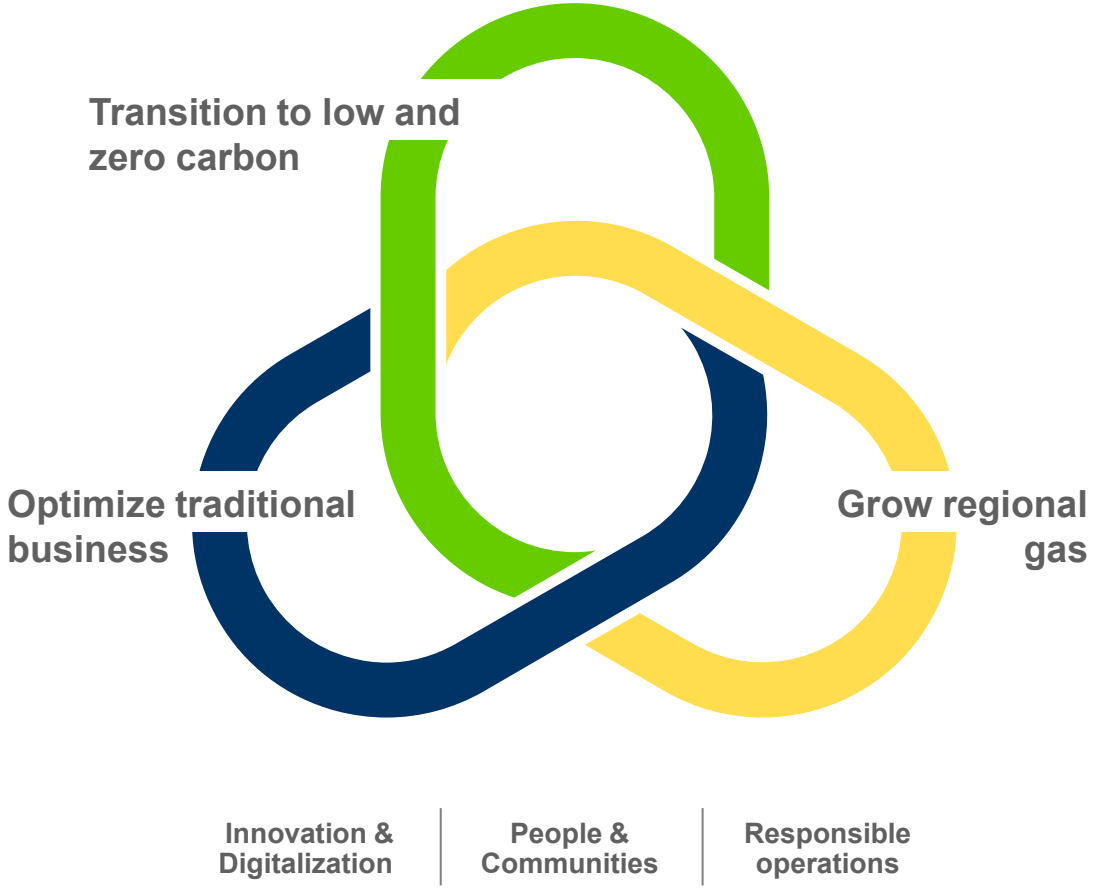
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Providing reliable energy. Progressing towards a lower carbon future[1]. Delivering value for our stakeholders.

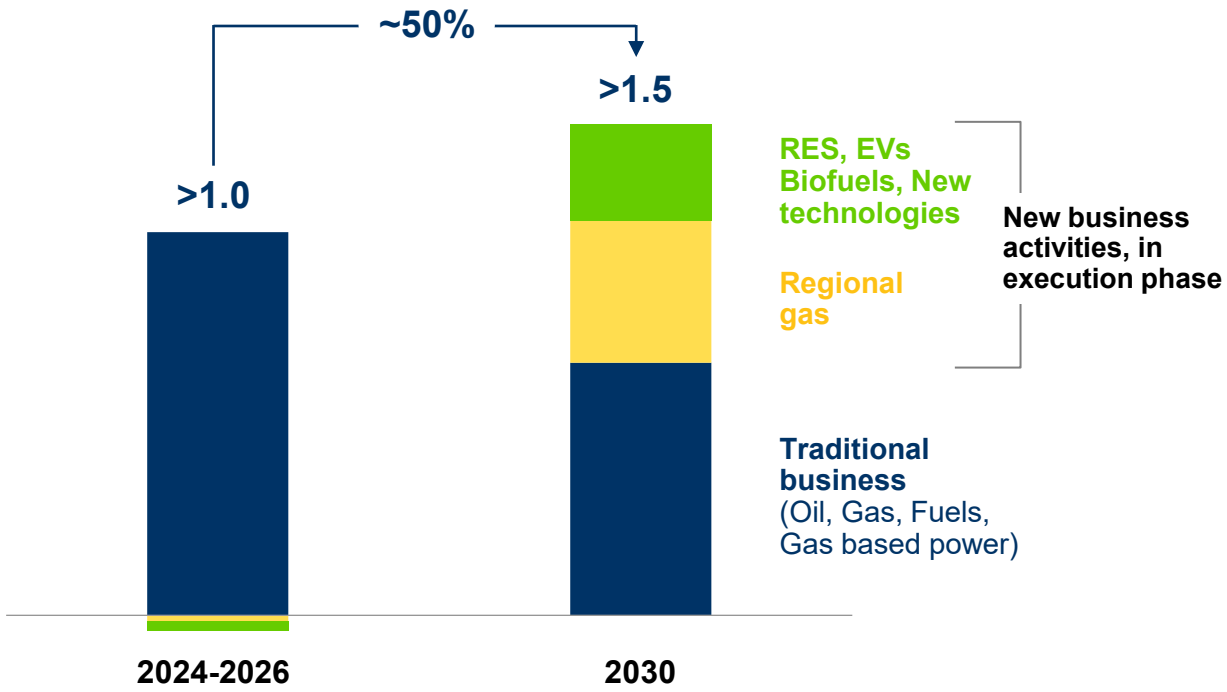


- **We are delivering on our Strategy 2030 through three areas of strategic growth:**
  - **Black Sea gas:** Neptun Deep, exploration opportunities
  - **Integrated power business:** renewables and battery storage complementing our flexible gas-fired generation
  - **Sustainable transportation:** biofuels[2] and e-mobility[3]
- **We are building our transformation on a robust integrated traditional business**
- **Our strong financial position is enabling attractive shareholder returns**

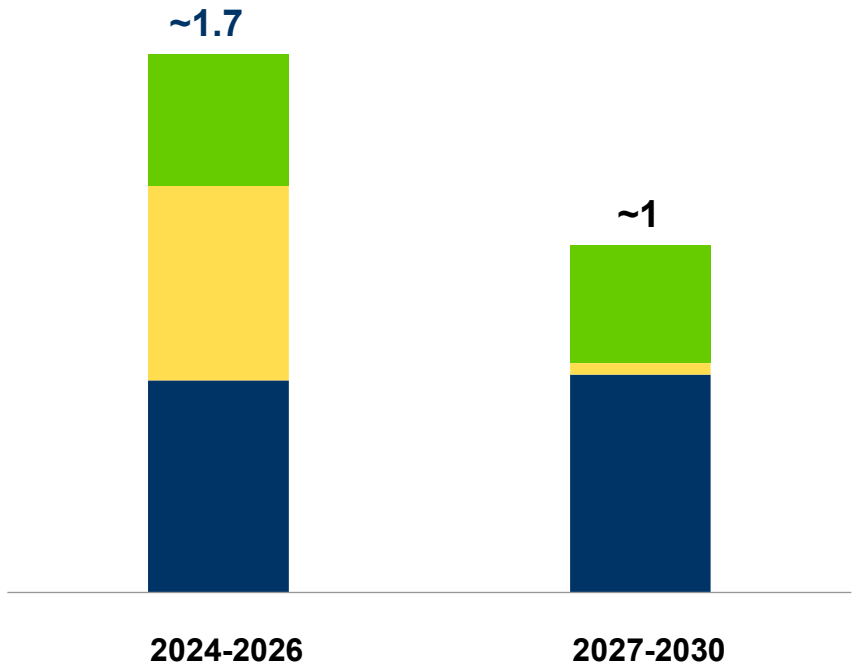
[1] Scope 1-2 GHG absolute emissions reduction target: -30% until 2030 vs. 2019; [2] SAF/HVO capacity of 250 kt/year operational in 2028; [3] ~5,000 charging points for EVs by 2030

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



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

<0.2% methane intensity by 2030

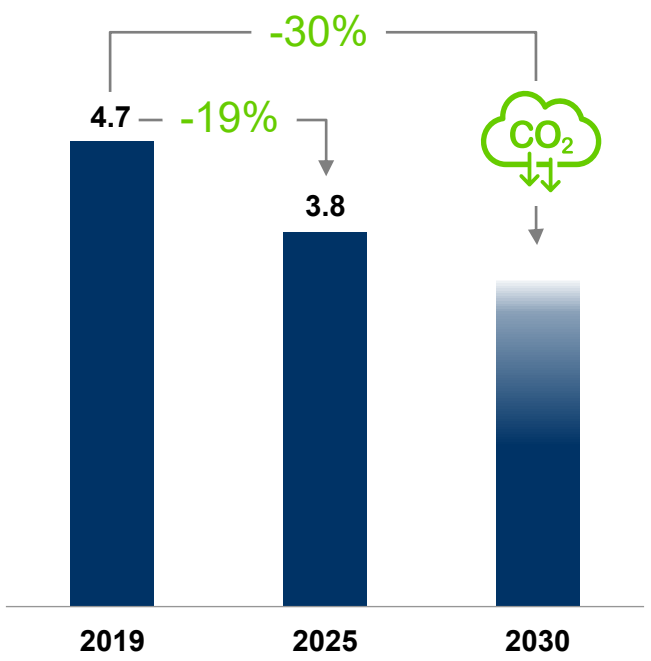
Strategic flexibility on emerging technologies that support energy transition

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

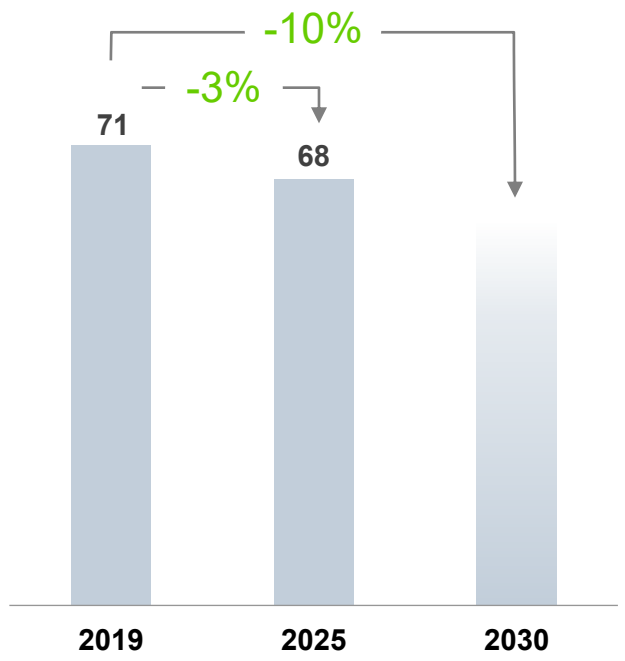
Capital allocation was adjusted to support attractive growth options and more mature technologies

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

Scope 1 – 2
GHG emissions
mnt CO_2eq

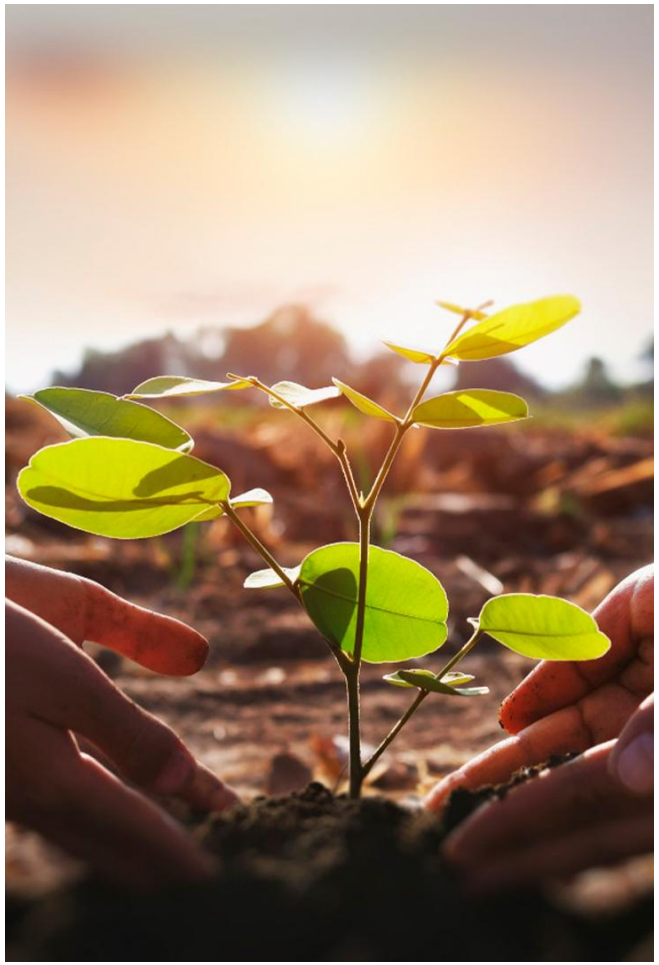


Scope 1 – 3[1]
Carbon Intensity of Energy Supply
g CO_2eq/MJ



[1] Includes Category 11 for Scope 3 emissions: Use of sold products for energy supply

Continue to deliver on our sustainability targets



Clear support for Paris Climate Agreement

E	**-19%** Absolute emissions, Scope 1&2[1]	**-77%** Methane intensity in E&P[1]
S	**30%** Women in management roles	**~20 mn EUR** Social projects
G	**35%** ESG targets in long-term executives' remuneration	**New BVB Code** Targeting high level of compliance
	FUNDAȚIA OMV Petrom	Investments in education, environment and health

ESG ratings[2]

SUSTAINALYTICS a Morningstar company	**Ranking: 35/277 (13th percentile) High risk (33.4)** *Previous: Medium (29.3)*
CDP	**B for Climate Change, B- for Water Security [3]** *Previous: B for Climate Change*
ISS ESG	**C+** *Previous: same*
ecovadis	**71/100: Silver** *Previous: 71*
S&P Global	**55/100** *(Previous: 55)*

[1] Group, 2025 vs. 2019; [2] Based on latest available report (referring to 2024); [3] CDP ratings are based on OMV Group's response; Water Security – first time submission based on 2024 report

Enabling our transformation

Digitalization with impact

Leveraging digitalization to accelerate transformation

- **Excellence in business operations**
  via simplification, standardization & automation
- **Outstanding customer experience**
  via mobile and self-service innovation
- **Progress powered by data**
  via Advanced Analytics & AI
- **Safeguarding people, assets & environment**
  via efficient processes & technologies

People make it happen



Short and long-term components

	Component	Max. opportunity	Outline
Variable related remuneration	LTIP	100% of Target LTIP	Performance period — Share payout
	Annual Bonus (STI)	180% of Target Annual Bonus	Performance period — Cash payout
Fixed related remuneration	Base salary	Set at a competitive level	



Strong ESG weight in performance-related remuneration

NEW

Shareholders approved updated Remuneration policy in Oct 2025 with 90% support

EB remuneration reflects OMV Petrom performance and LTIP is distributed in OMV Petrom shares starting 2026+

Annual Bonus

Individual goals (50%)

Team goals (50%):

- 30% HSSE
- 20% GHG emissions reduction
- 50% operating costs

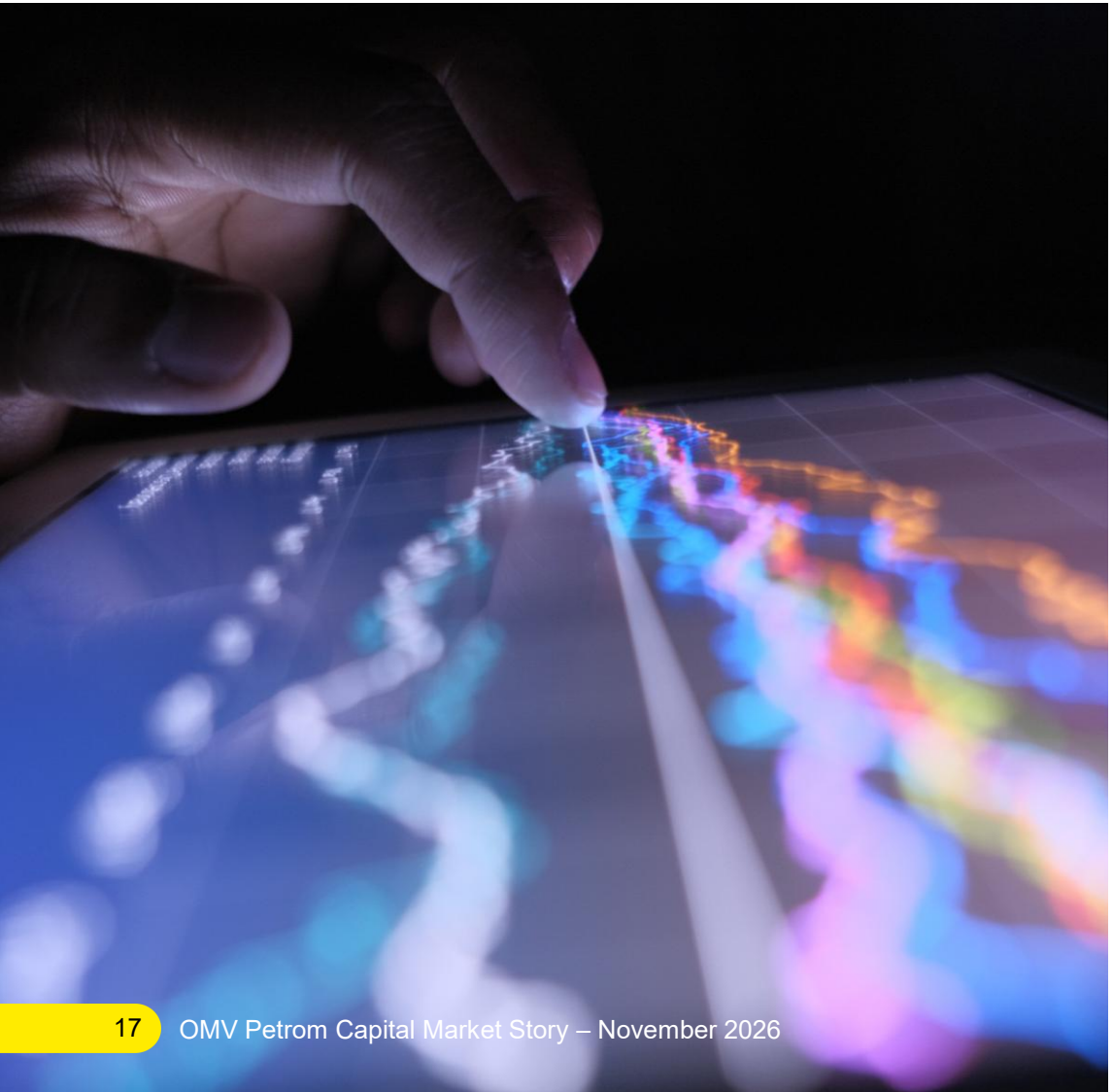
✖

Company performance multiplier (e.g. Net income, Free Cash Flow, Clean CCS ROACE)

Long-Term Incentive Plan (LTIP)

- 35% ESG targets (GHG reduction and diversity)
- 35% Free Cash Flow
- 30% TSR

Resilient growth supports higher cash flows and attractive shareholder returns



Building a resilient energy company

1

- Game changing Black Sea
- Integrated power
- Sustainable transportation[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



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OMV Petrom

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

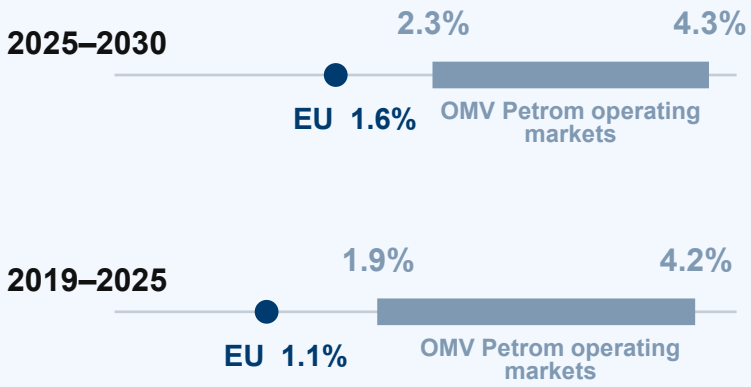
European energy environment is going through significant transformation

- 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 EU[1]

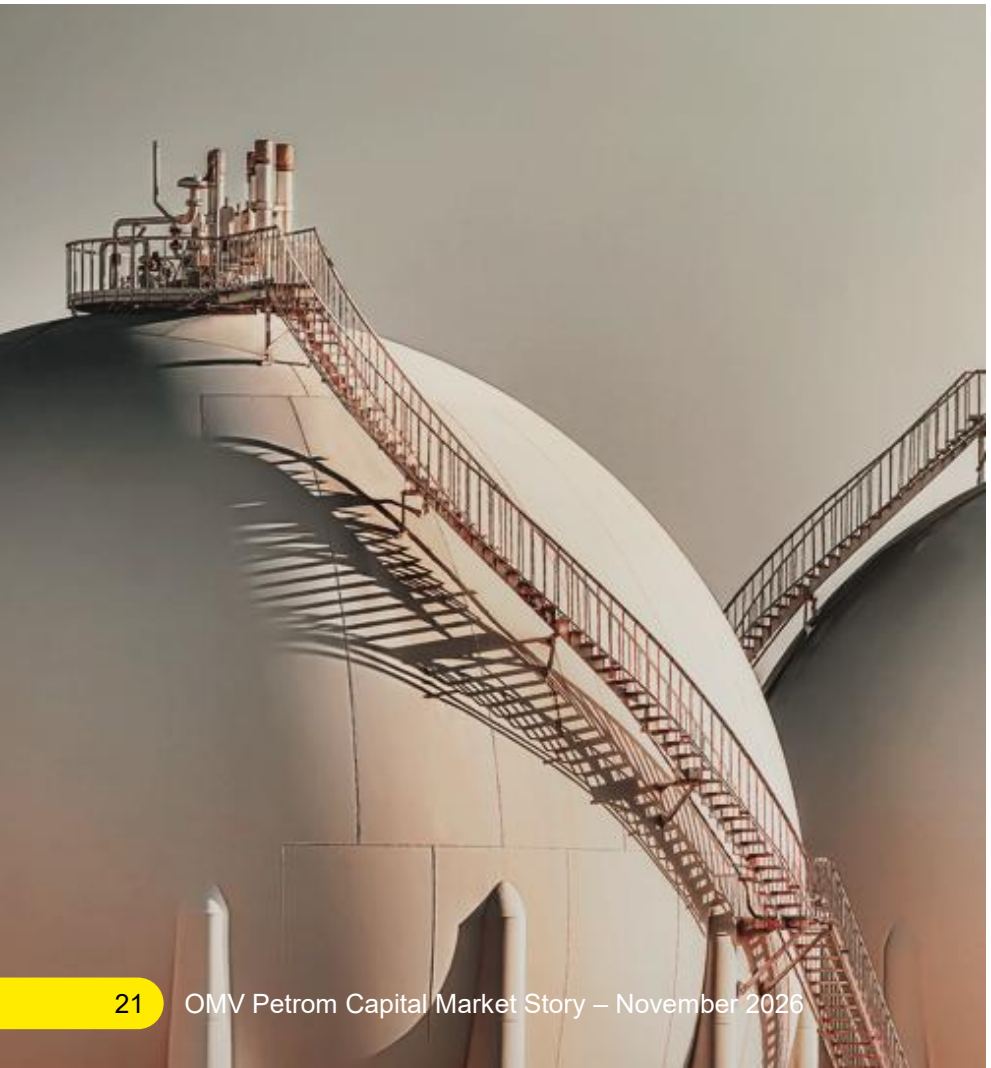
Operating region = Romania, Bulgaria, Serbia and Moldova

Demand[2] 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.	↗ +1[4]	↗ +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 – 110[1] *(prev. 120 – 130)*
CO_2 EUR/tCO_2	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



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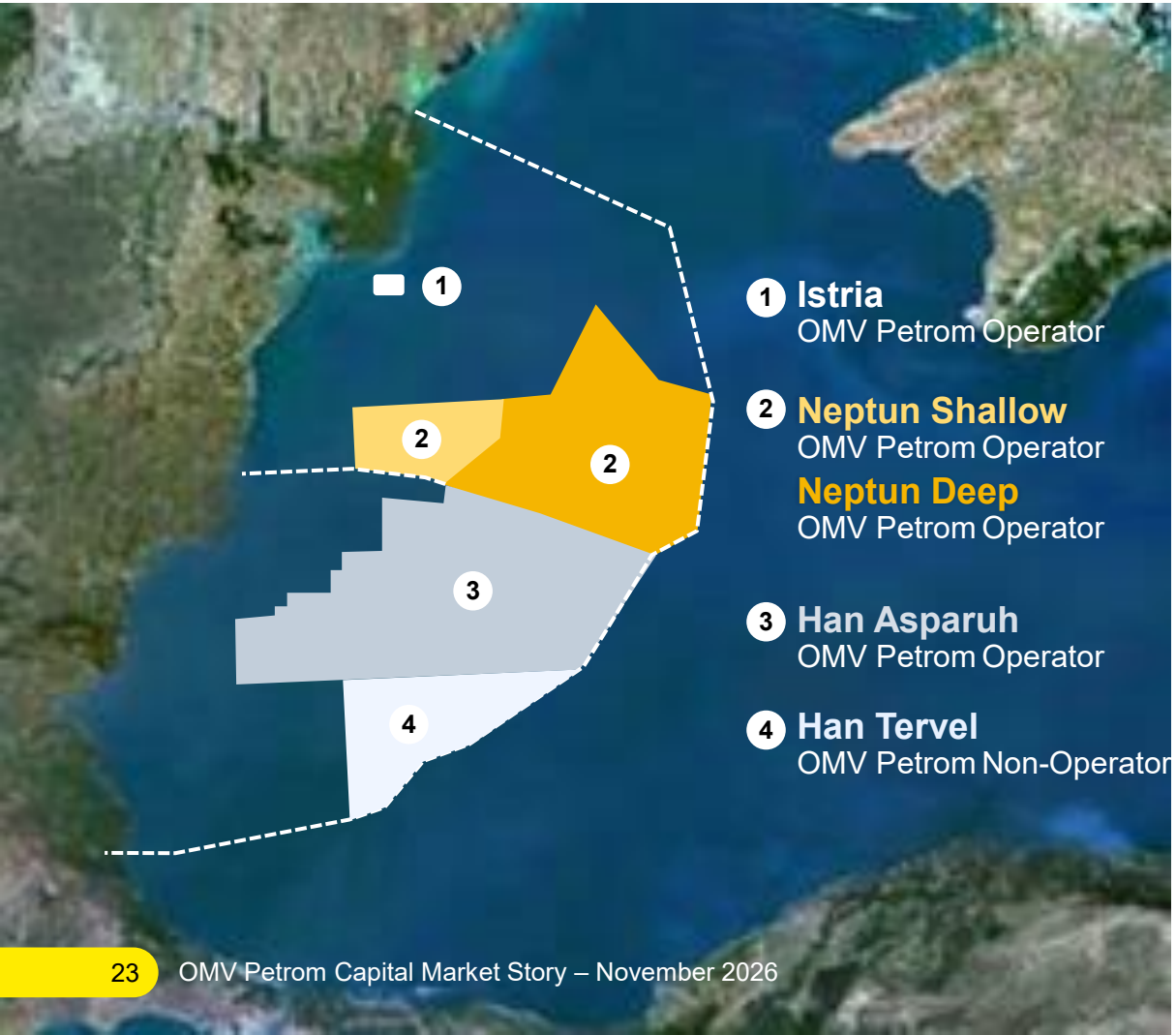
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Building a strong position in a proven and emerging gas play



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

- **Production**
  Petromar (>12 kboe/d[1]), Romania
- **Development**
  Neptun Deep (~70 kboe/d[2]), 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 average[5]
- Plateau production to be reached by end-Q3 2027
- Fully remotely operated production platform (unmanned)
- 2.2 kg CO_2/boe GHG emissions, eight times lower than the industry average[6]

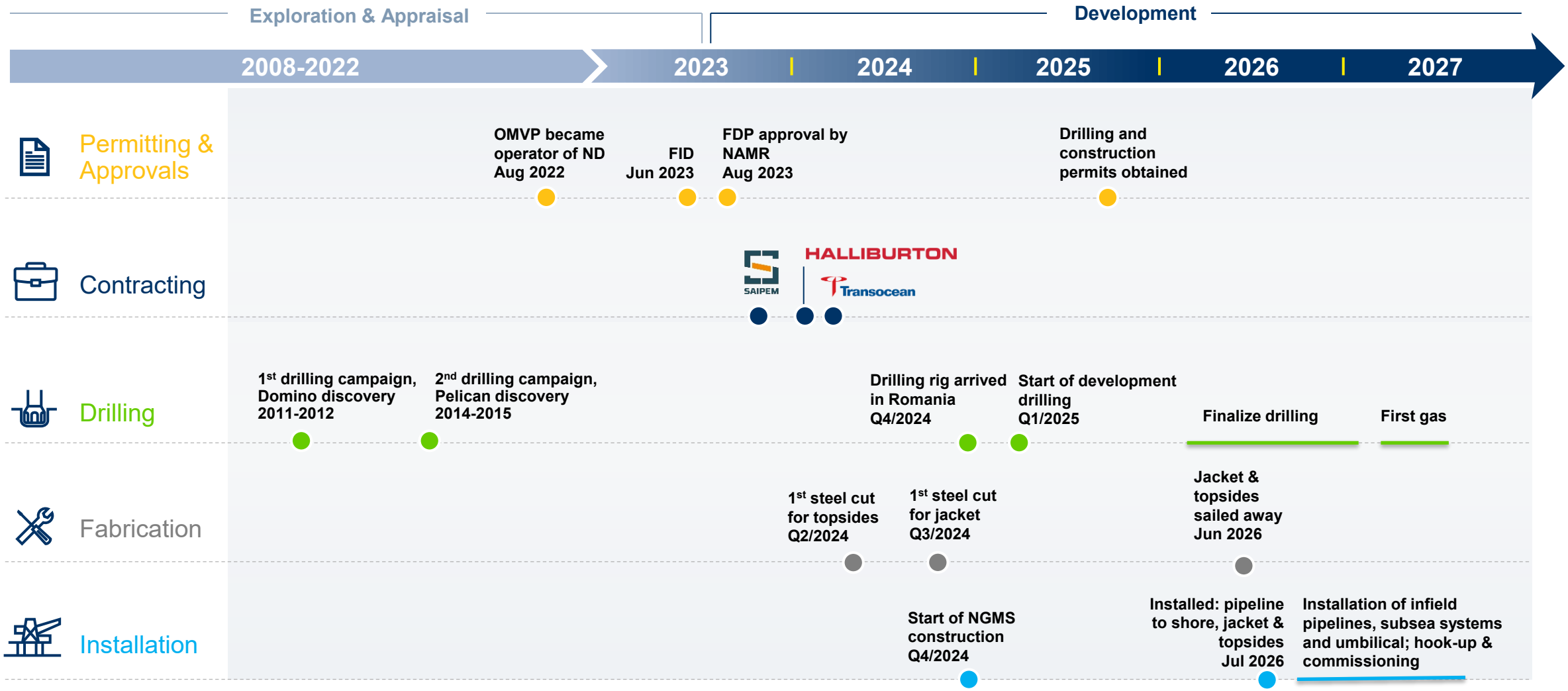
Benefits for Romania:

- 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] OMV Petrom's perspective: 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

On track to deliver first gas in H1 2027



Continue exploration for new opportunities

EUR 100 mn

offshore exploration expenditures by 2030[1]

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)

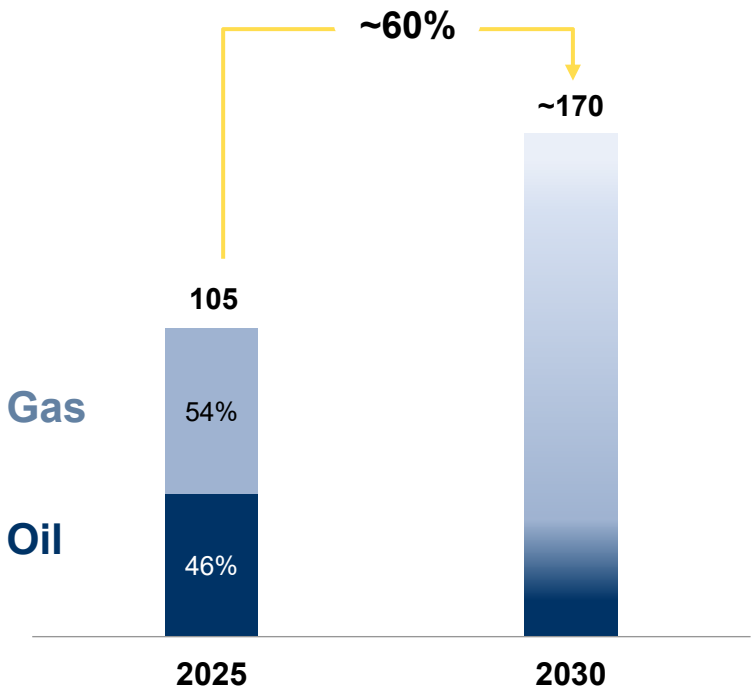
Bulgaria - expanding our exploration portfolio:

- **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 production[1]
kboe/d



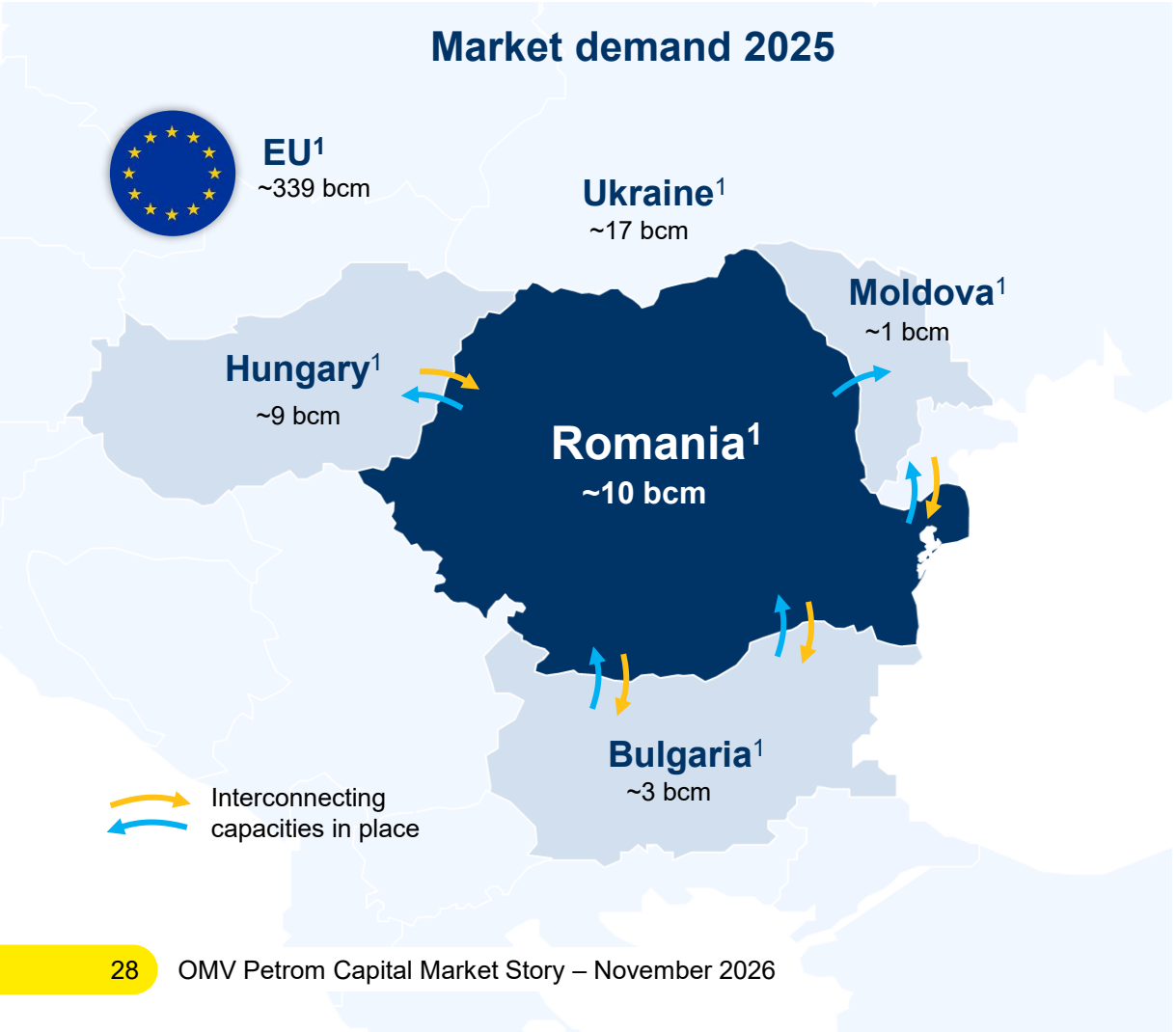
	2025	2030
Workovers p.a.	542	~500
New wells p.a.	31[2]	30 - 50
Facilities and wells modernized and automated	88%	>95%
Production cost USD/boe	18	~9[3]
CAPEX EUR mn	1,120	~500[4]

Exploration onshore:

- **~EUR 100 mn** exploration expenditures[5]
- **~2 exploration wells per year**[6]

[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

Total Group gas sales[2]

>70 TWh/year by 2030, including Neptun Deep

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

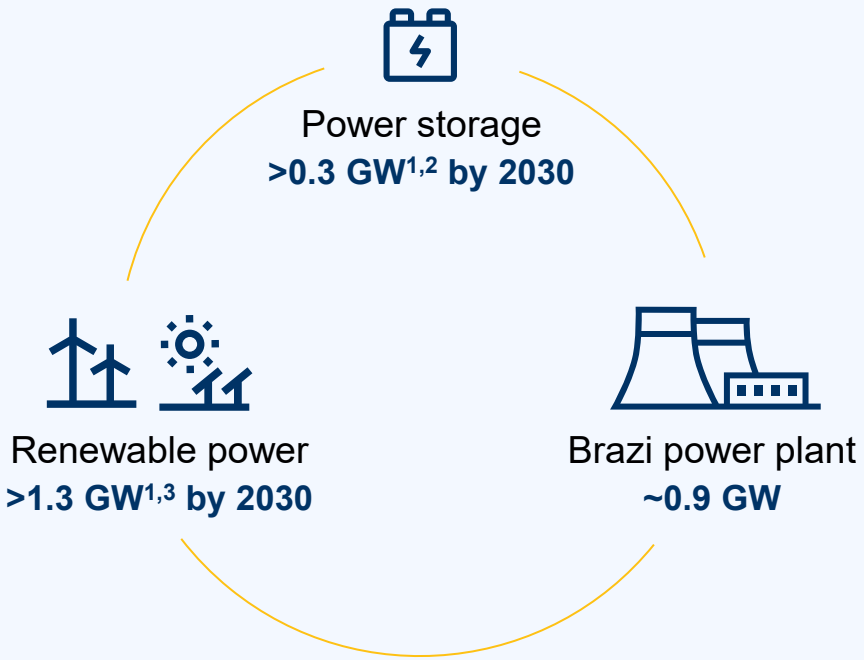
Romania + 6 countries

regional presence[3]

[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

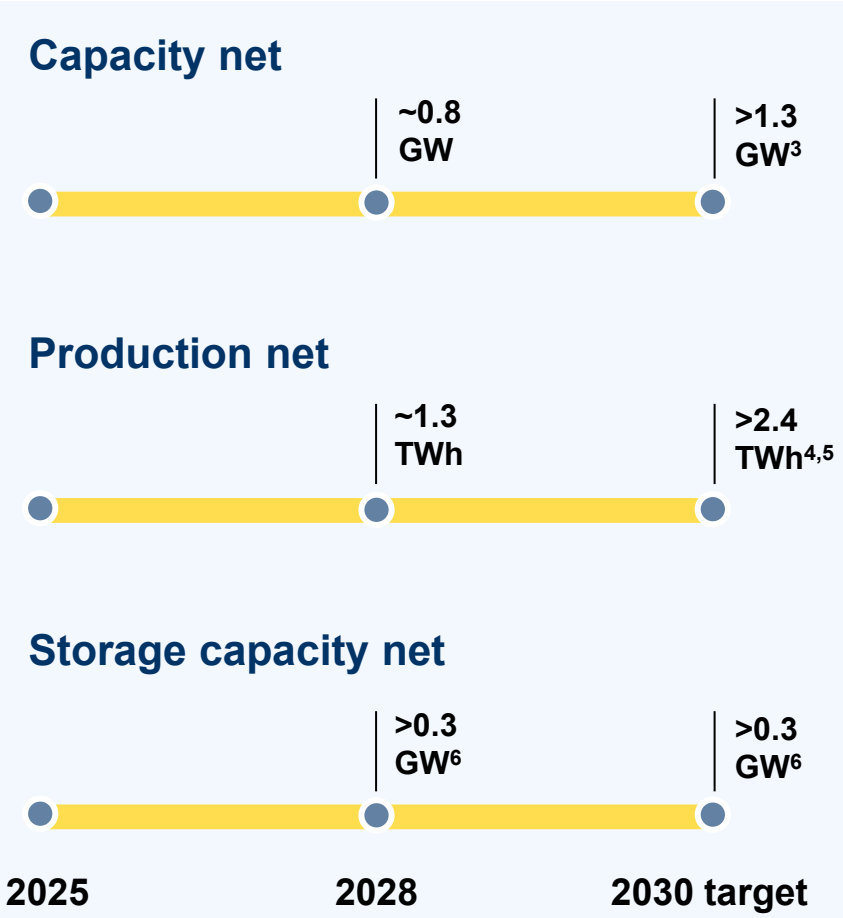
Customer focused

- 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

RES project portfolio

~EUR 1 bn[1,2] investment to support our renewables portfolio



Investment rationale

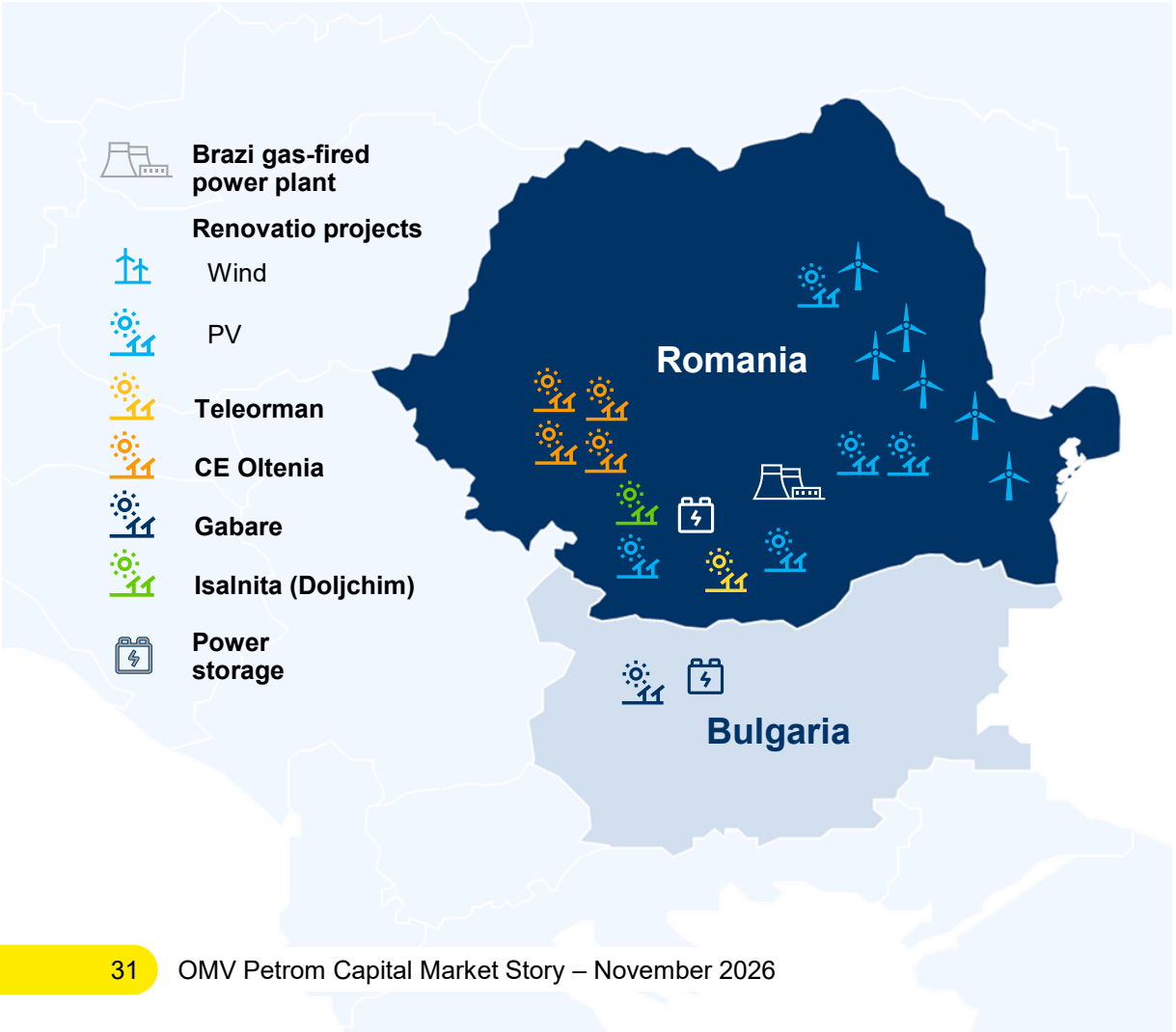
- **Integrating** renewables, power storage and flexible gas generation
- Strong renewable **asset base** in Romania and Bulgaria
- **Multiple value streams,** capturing flexibility driven uplift
- **Capital-efficient growth** with diversified funding and **double-digit IRRs**
- **~EUR 100 mn** contribution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

What we delivered

- **~0.85 GW** in development[2,7], thereof: ~0.7 GW under construction[2,8]
- **>100 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 31.10.2026: [3] Capacity >2.5 GW; [4] Thereof ~45% PV, ~55% wind; [5] >4.7 TWh; [6] >0.6 GW; [7] ~1.6 GW; [8] >1.2 GW; [9] 200 MW; [10] 2025 production: ~0.1 TWh; [11] 340 MW; [12] Spent by end-September 2026, not including shareholder loans.

More than 60% of projects FID-ed



Joint development with our partners

- **CE Oltenia**[1]
  550 MW[2] PV, 50% interest
- **Renovatio**[3]
  ~980 MW[2] wind, 180 MW[2] PV, 2 MW hydro[2], 50% interest thereof, 200 MW operational[4]
- **Gabare (Bulgaria)**[3]
  415 MW[2] PV + 320 MW[2] 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

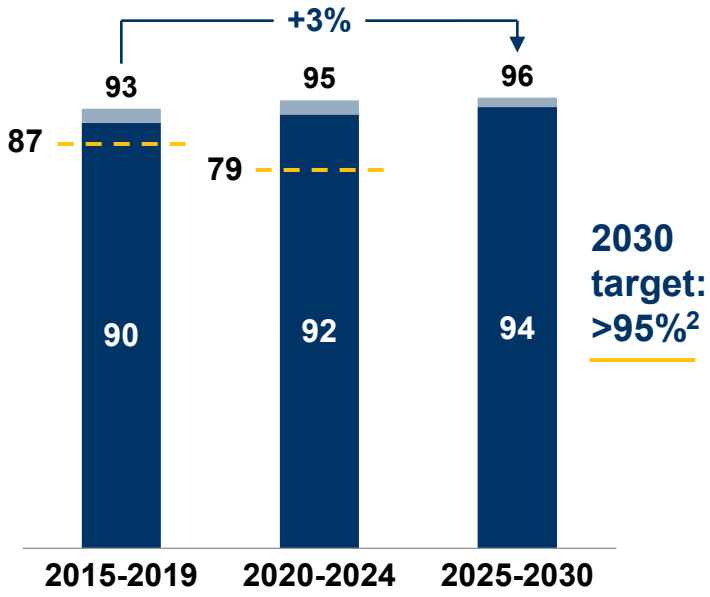
2/3 solar
1/3 wind

Total > 2.5 GW capacity by 2030

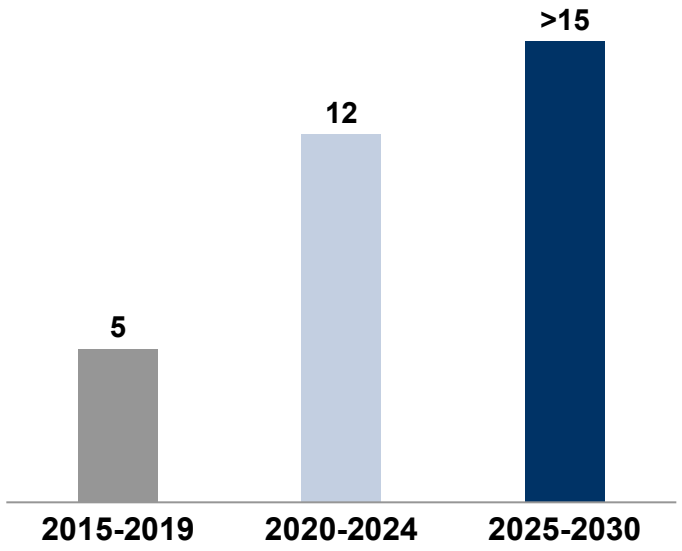
[1] Joint operation; [2] Including partnerships; [3] Joint venture; [4] As of end-October 2026

High performing refinery: adapted to capture market opportunities

High reliability: above average refinery utilization[1]
%



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/year[3]
CAPEX

Up to EUR 100 mn
2030 EBIT[4]

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

EU-16 average utilization, OPEC Monthly Reports

Average refinery utilization including years with planned turnarounds

[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 EBIT[1]

Biofuels



Green H_2



Investment rationale

- **Increasing biofuels demand** in our region
- **EU funding availability**
- **Integration opportunities:** green H_2 production supports compliance with **RFNBO[2] targets** and **supplies SAF/HVO** unit
- Build on already **strong aviation footprint**

What we delivered

EUR 750 mn program[3] in advanced stage:

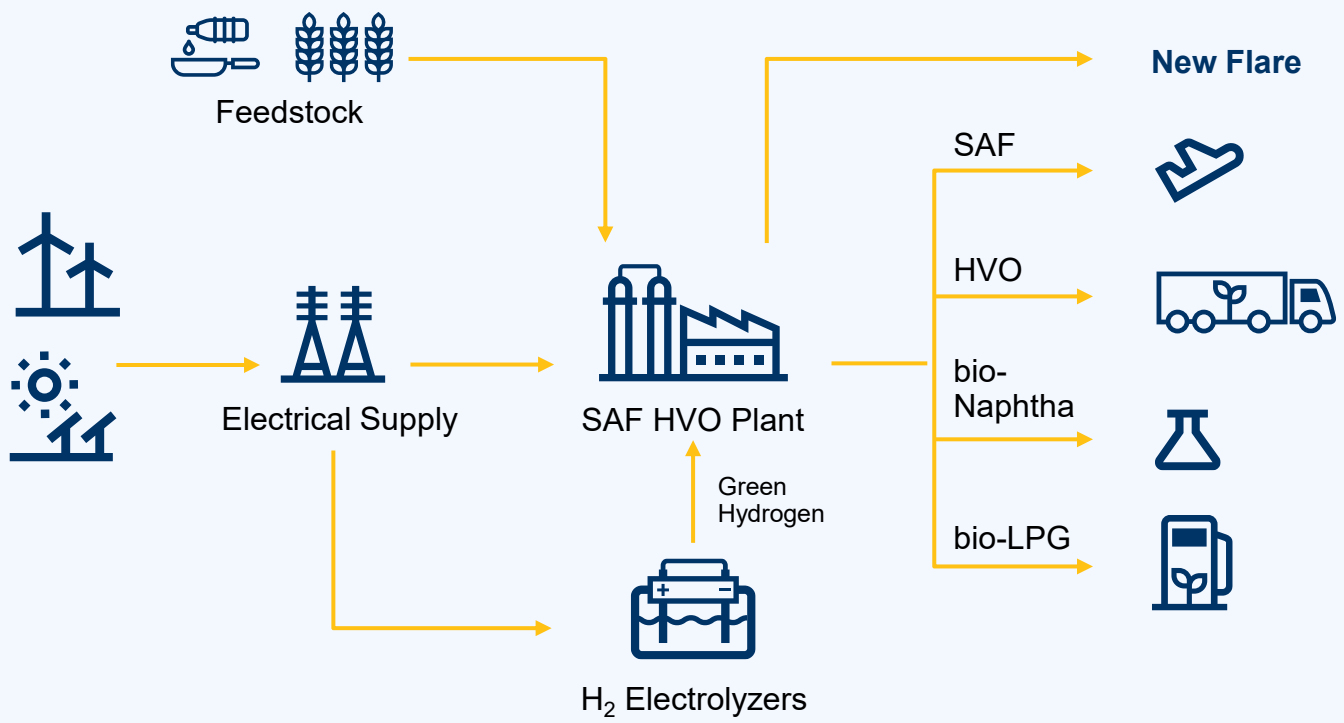
- 250 kta plant[4] for SAF/HVO production in development
- 55 MW green H_2 electrolyzers almost completed

CAPEX spent[5]

- ~ EUR 375 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-September 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 progress**[1]
- Feedstock secured **>80%**
- Pre-marketing: **~25%** of production placed
- **Safety: ~2 million man-hours** without LTI[2]
- **SAF HVO plant**
  - Main civil works and heavy lifting successfully completed
  - Construction continues to advance across all project areas
- **Green H_2 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

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 margin[2] to reach EUR 160 mn

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

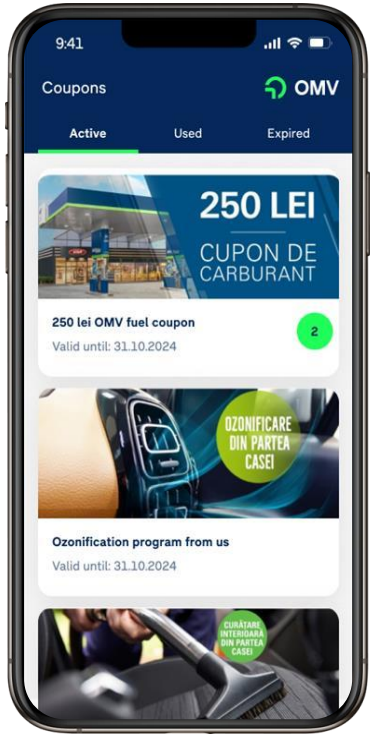
Increase profitability per filling station by 20%[2,3]

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

~60% of R&M EBIT in 2030[4]

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

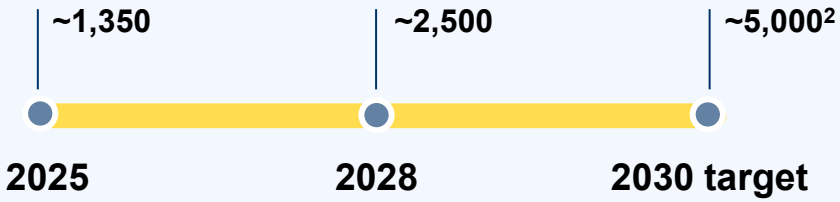
Consolidating our position as 1st choice mobility provider in Romania

2030 objectives

~EUR 0.2 bn
CAPEX[1]

>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 spent[3]:** ~EUR 88 mn, of which ~EUR 13 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-September 2026



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1 | Investment proposition

2 | Strategy 2030

- Transforming for resilient growth
- Energy markets and macro environment
- On track to deliver our 2030 targets
- **Financial frame**

3 | Q3/26 results

4 | Outlook

5 | FY25 results

6 | Appendix

Capital discipline enabling strong financial performance and attractive shareholder returns



Rigorous capital discipline

Strong financial performance

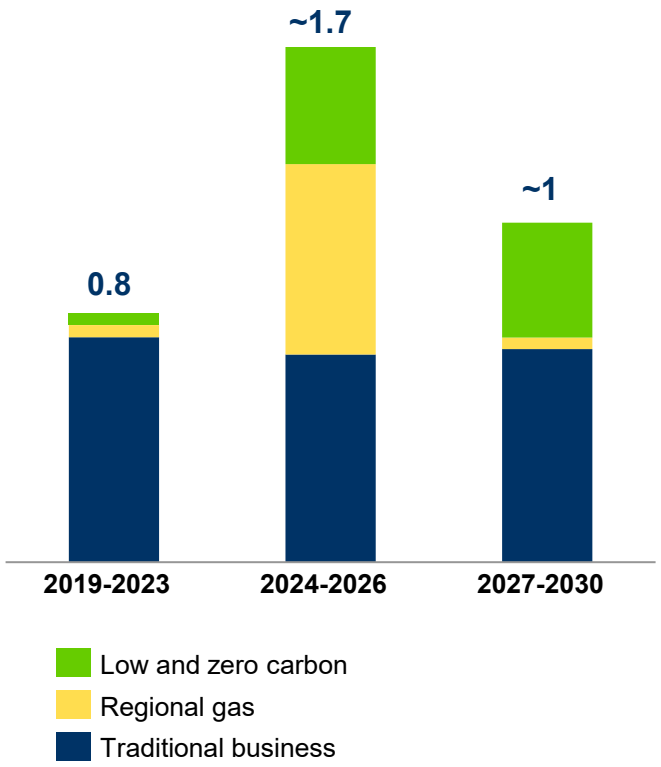
Attractive shareholder returns

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%

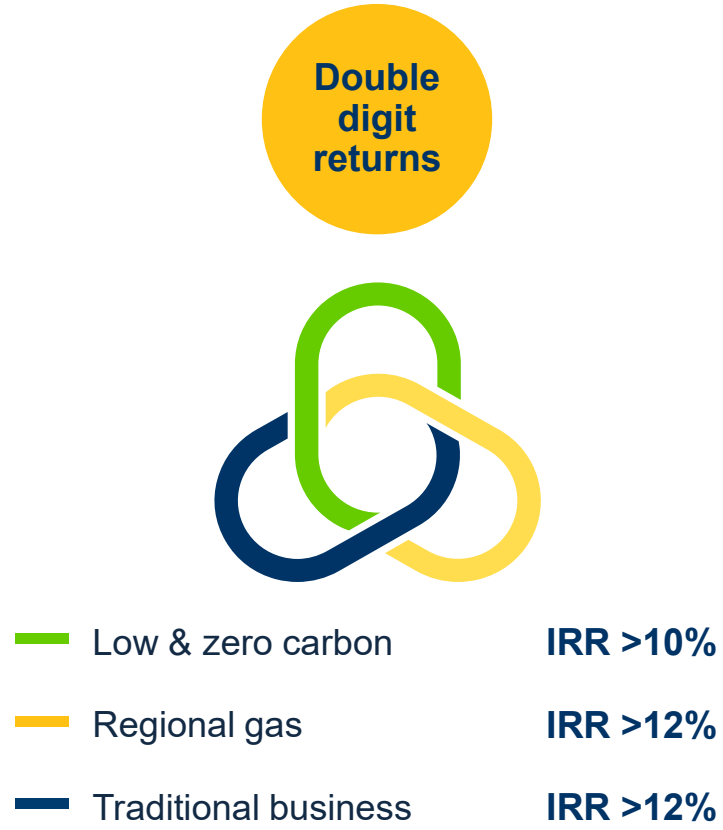
[1] Gross CAPEX cumulated for 2022-2030; [2] Single year rate

Rigorous capital discipline underpins strategy

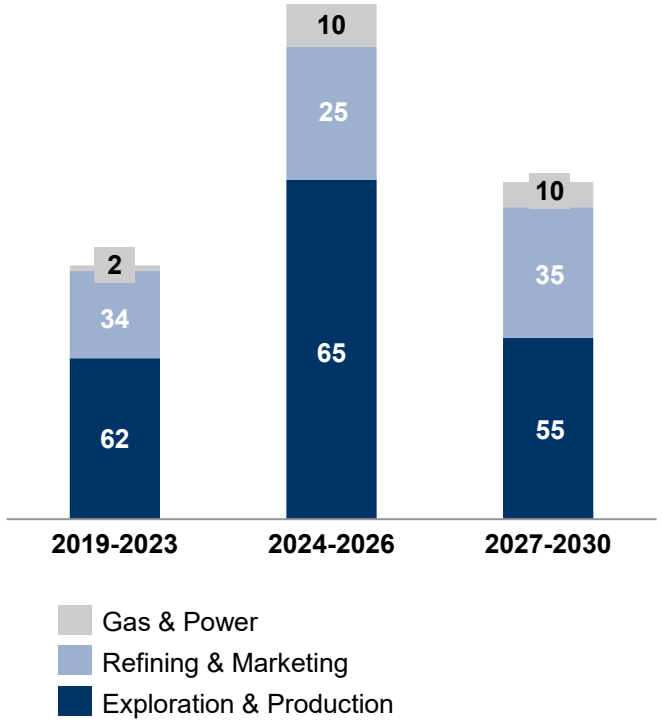
Average annual CAPEX
By strategic pillar · EUR bn



Return thresholds

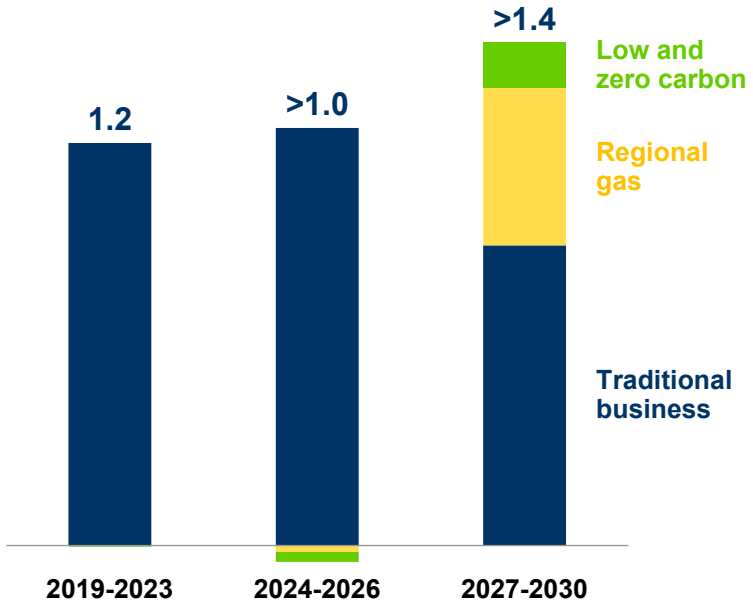


Average annual CAPEX
By business segment · %

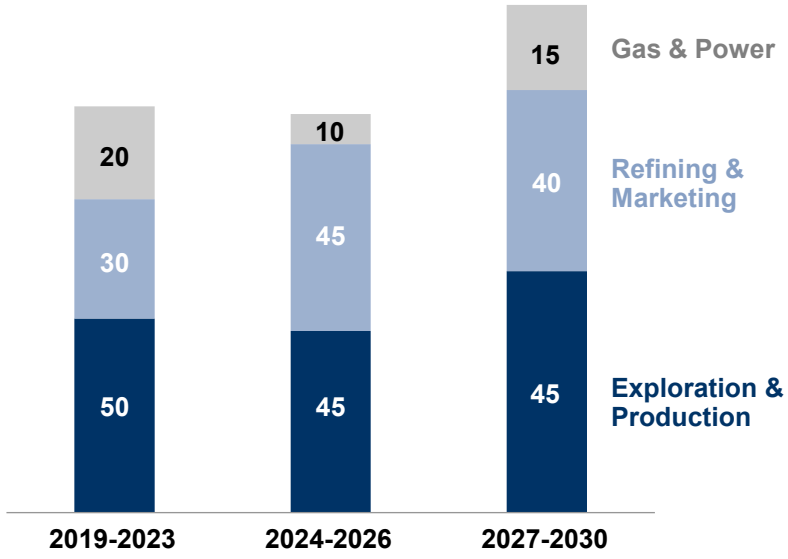


Delivering strong financial performance across the business

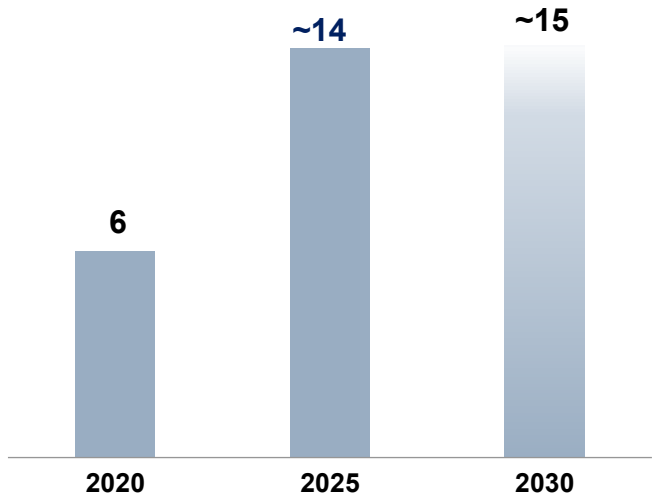
Average annual Clean CCS EBIT
per strategic pillar[1], EUR bn



Average annual Clean CCS EBIT
by business segment[1], %



Clean CCS ROACE
%



[1] Adjusted for solidarity contribution recorded in 2023

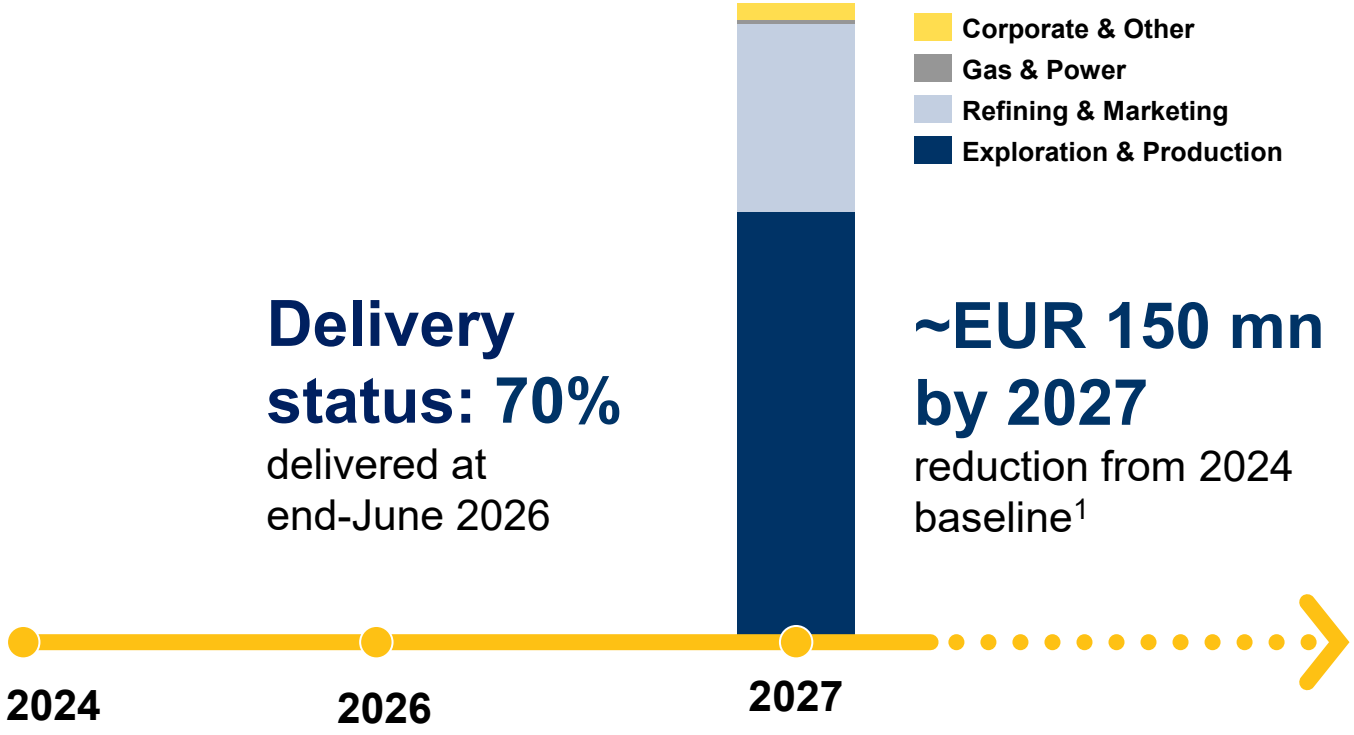
Efficiency programs continued to strengthen cost competitiveness

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

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



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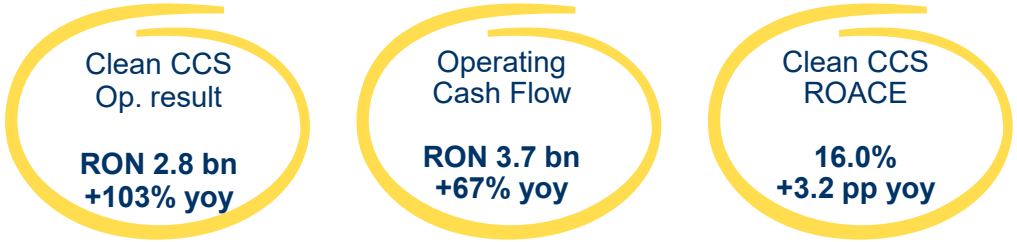
5 | FY25 results

6 | Appendix

OMV Petrom

Strong performance in challenging market and geopolitical context

Q3/26 highlights



- Refinery **utilization** rate: 100%
- **Refined product sales**: +10% yoy
- **Net electrical output** up 3%; 12% of Romania's power production
- Continued **focus on efficiency:** production cost per boe -6% yoy

Strategic execution continues

- **Neptun Deep** project: progressing according to plan for 1st gas in H1/27
- **Renewable power:** ~850 MW[1] of PV and wind FID-ed, thereof >100 MW[1] in production; EPC[2] contract signed for 20 MW BESS at Isalnita PV project
- **Biofuels:**
  - construction of the SAF/HVO plant progressing as scheduled; foundations completed; key specialized equipment installed;
  - H2 electrolyzers: 55 MW production capacity installed

HSSE

TRIR[3]: 0.46

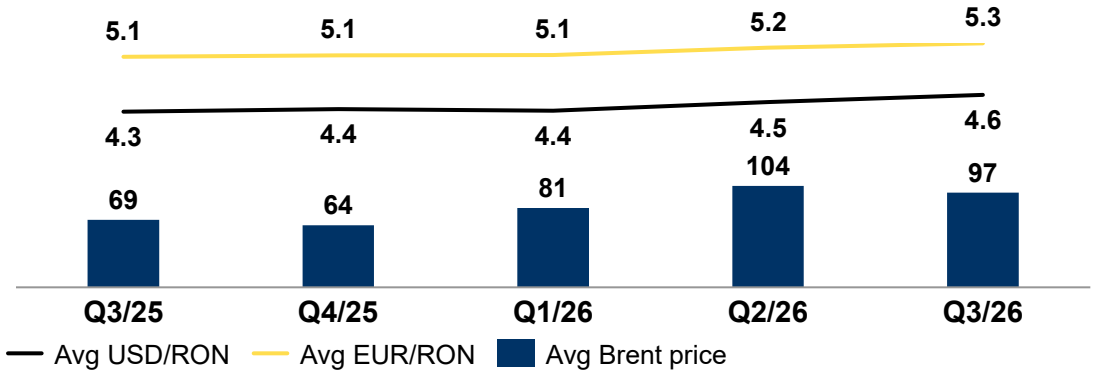
GHG intensity[4]: -19%

[1] Net to OMV Petrom; including partnerships: ~1,600 MW FID-ed, thereof ~200 MW in production; [2] Engineering, procurement, construction; [3] Total Recordable Injury Rate, October 2025 – September 2026; [4] Greenhouse gases intensity 2025 vs. 2019

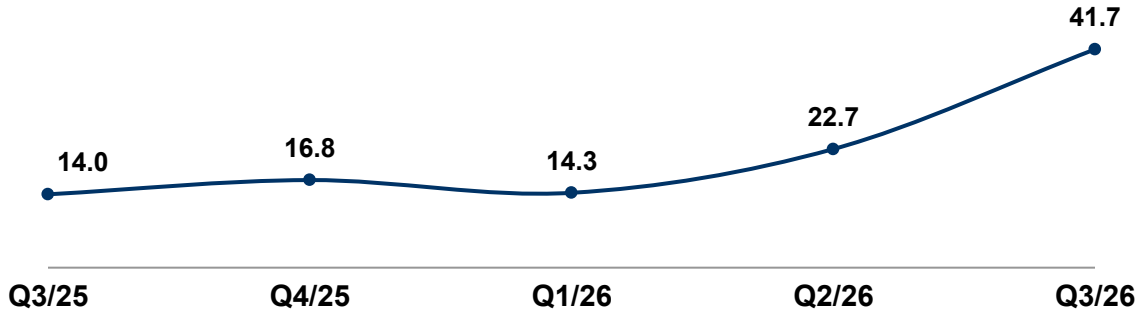
Volatile market environment

Oil prices
USD/bbl

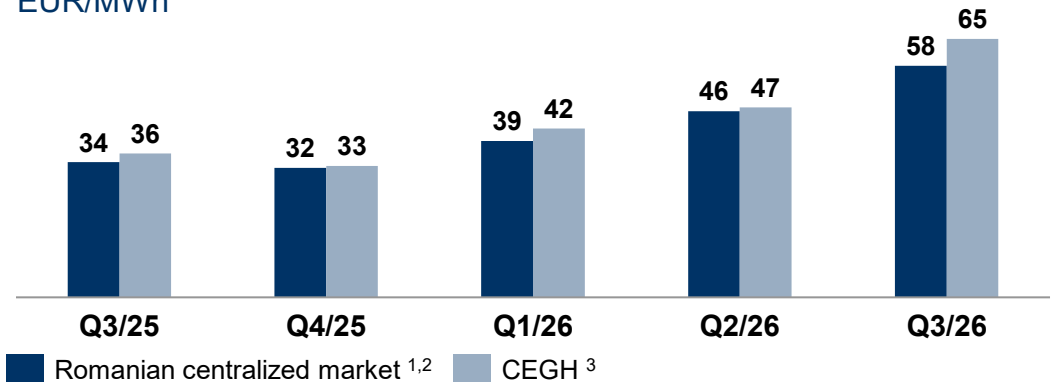
FX
RON/USD, RON/EUR



OMV Petrom indicator refining margin
USD/bbl

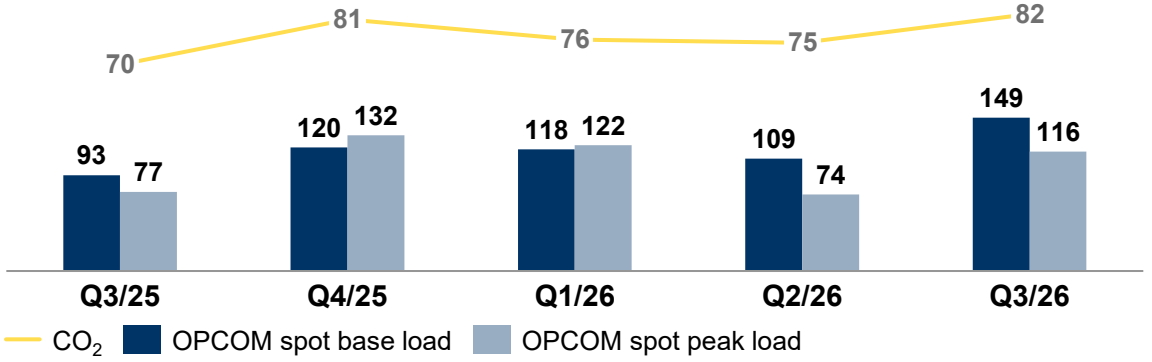


Gas prices[1]
EUR/MWh



Power prices in Romania[1]
EUR/MWh

CO_2 prices
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

Weak economic context

GDP	0.7% 2025[1]	-0.6% H1/26[1]	-0.5% 2026e[2]
Inflation (CPI)	9.7% 2025[3]	6.6% Sept 26/Sept 25[3]	6.1% 2026e[3]

Romania at investment grade by major rating agencies [4]



Demand	Q3/26 yoy	9m/26 yoy	2025 yoy
Fuels[5]	+2%	+2%	-1%
Gas[6]	-5%	+1%	+1%
Power[7]	-6%	-3%	-1%

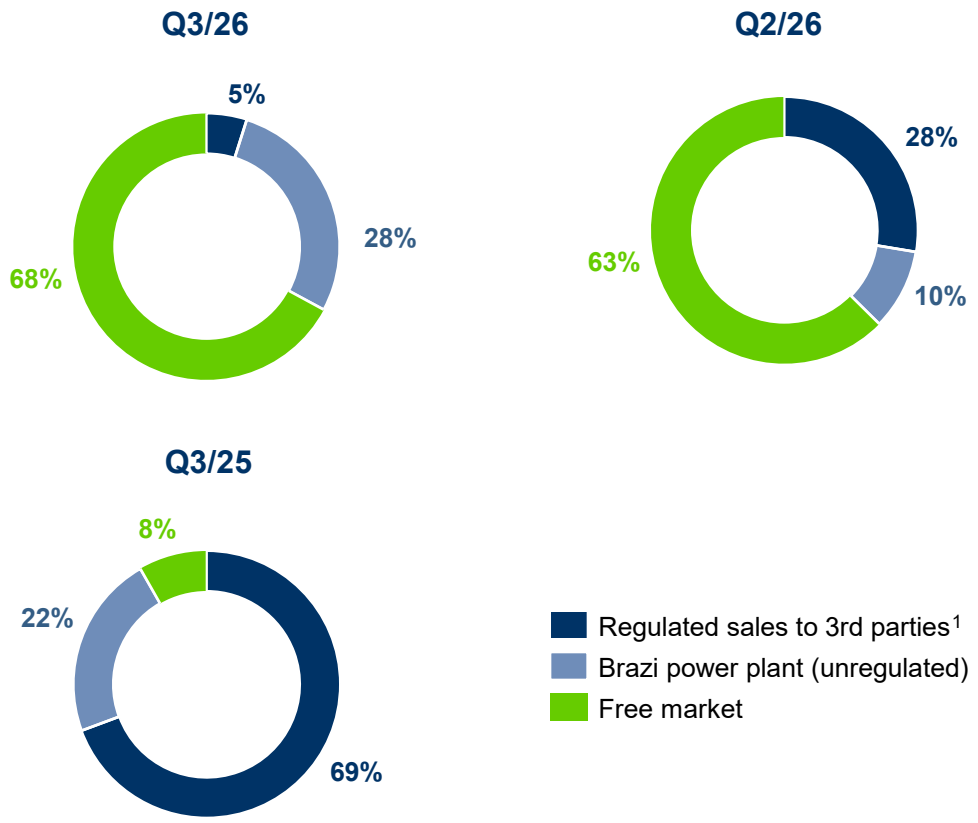
[1] Romanian National Institute of Statistics (unadjusted figures, October 2026 report; seasonally adjusted figures: H1/26 -1.6% yoy; Q2/26: -1.9% yoy and flat qoq; [2] IMF, October 2026; [3] National Bank of Romania (www.bnr.ro, as retrieved on 28 October 2026) end of period figures; 2026 CPI forecasts as per August 2026 inflation report; [4] S&P (October 2026), Fitch (July 2026); Moody's (March 2026); [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

Measures introduced in 2026

Applicable regulations

- **Regulatory measures** in the context of crisis situation on the oil and fuels markets:
  - **Q3/26:** limited the marketing margins for gasoline and diesel; flexible excise reduction mechanism for standard diesel; solidarity contribution
  - New legislative initiatives underway
- **Gas sector remains regulated** until end Q1/27 with reduced scope (only households and heat producers for households)
- **Construction tax:** introduced starting 2025 at 0.5% of the net value of constructions; to be eliminated as of January 1, 2027
- **Oil & gas revenues tax:** at 0.5%, extended until end-2026; to be eliminated as of January 1, 2027
- **Power sector deregulated** since July 1, 2025, with state support provided to vulnerable consumers

Gas regulations extended, with reduced scope



[1] Includes sales quantities subject to GEO 27/2022 and GEO 119/2022 (households, heat producers for households, cost plus, trading, supplier of last resort)

E&P – strong performance supported by commodity prices

Main drivers for Q3/26 results

- Higher realized crude and gas prices
- Lower production costs
- Positive FX effect of revenues

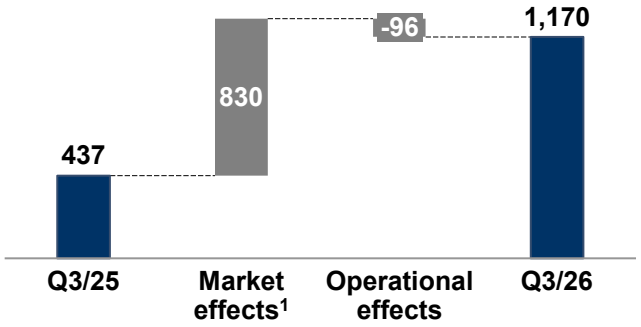
- Higher E&P taxation
- Lower sales volumes -7%

Outlook 2026

- **Brent oil price**: USD >95/bbl (prev.: USD 85-95/bbl; 2025: USD 69/bbl)
- **Production**[2]: >100 kboe/d (2025: 104.5 kboe/d)
- **Production cost**: similar to 2025 (2025: USD 17.8/boe)
- **CAPEX**: RON ~6.6 bn (prev.: 5.6 bn; 2025: RON 5.6 bn)

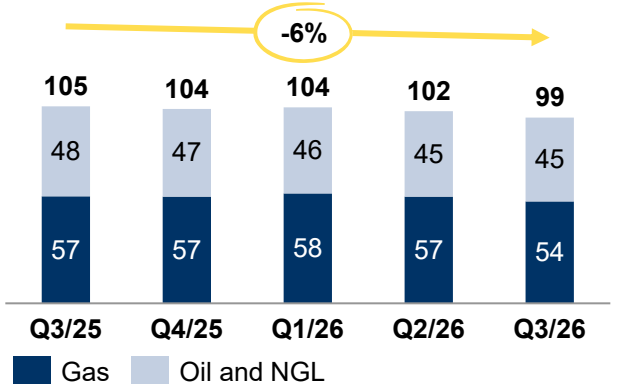
Clean Operating Result

RON mn



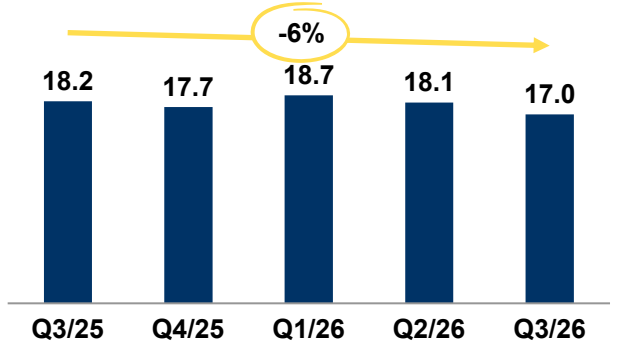
Hydrocarbon production

kboe/d



Production cost

USD/boe



[1] Market effects defined as oil and gas prices, foreign exchange impact on revenues, price effect on royalties (including gas over-taxation); [2] Considering no divestments

R&M – strong refinery utilization amid supply disruptions

Main drivers for Q3/26 results

- Higher refining margin, +198%
- Excellent refinery utilization rate: 100%
- Total refined product sales +10%

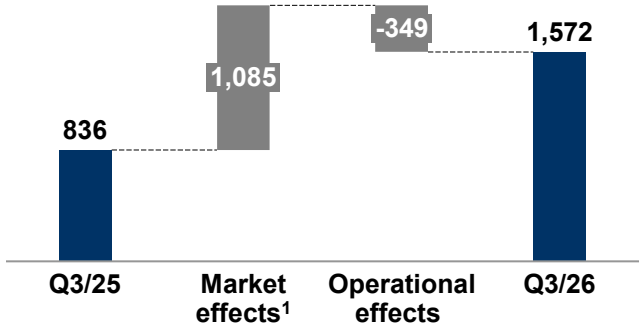
- Margin cap affecting sales channels
- Logistic and insurance supply costs significantly higher

Outlook 2026

- **Refining margin:** USD >20/bbl (prev.: USD >15/bbl; 2025: USD 12.4/bbl)
- **Refinery utilization:** >95% (2025: 93%)
- **Retail fuels demand in Romania:** stable yoy
- **Total refined product sales:** higher yoy
- **Retail fuel sales:** higher yoy

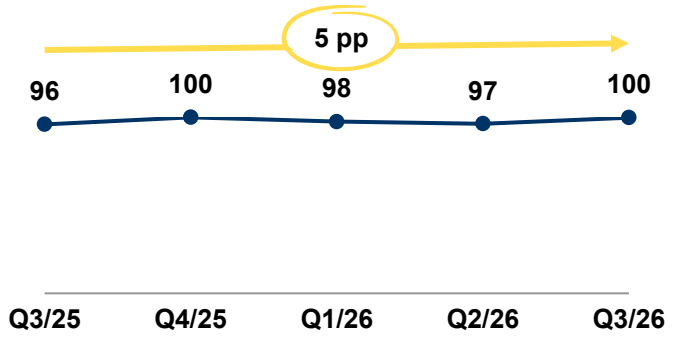
Clean Operating Result

RON mn



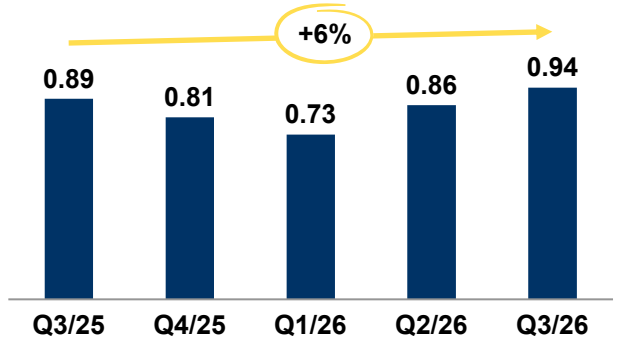
Refinery utilization rate

%



Retail sales volumes

mn t



[1] Market effects based on refining indicator margin

G&P – power result supported by improved market conditions

Main drivers for Q3/26 results

- Strong Brazi power plant result, improved market spark spreads
- Improved margins on third party power

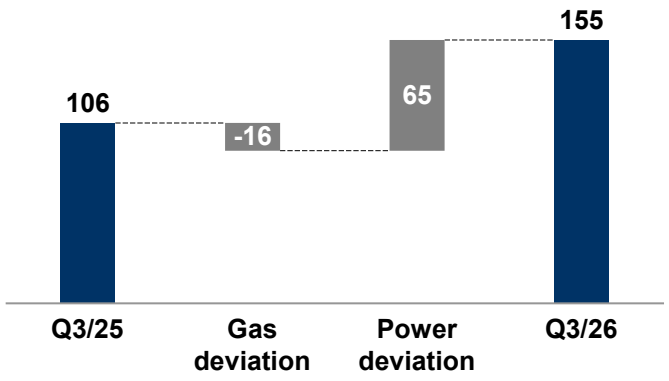
- Lower gas sales volumes, -15%
- Higher logistic costs
- Higher turnover tax

Outlook 2026

- **Demand for gas in Romania:** stable yoy
- **Demand for power in Romania:** slightly lower yoy (prev.: stable yoy)
- **Total gas sales volumes:** broadly stable yoy (prev.: lower yoy)
- **Net electrical output:** slightly higher yoy (prev.: broadly similar yoy)

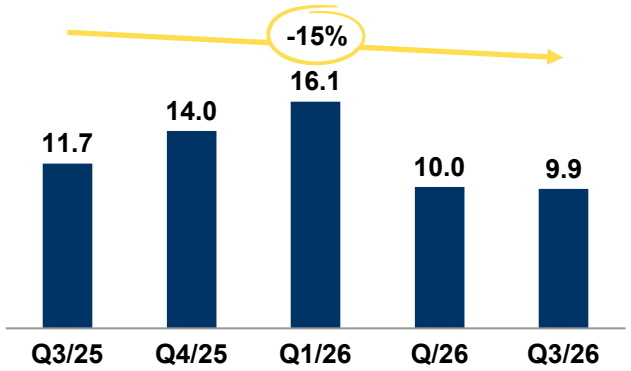
Clean Operating Result

RON mn



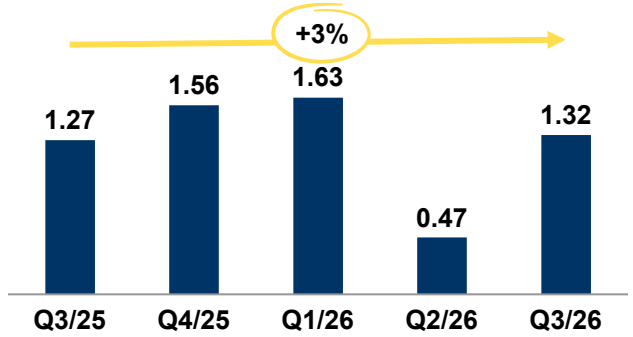
Gas sales volumes

TWh



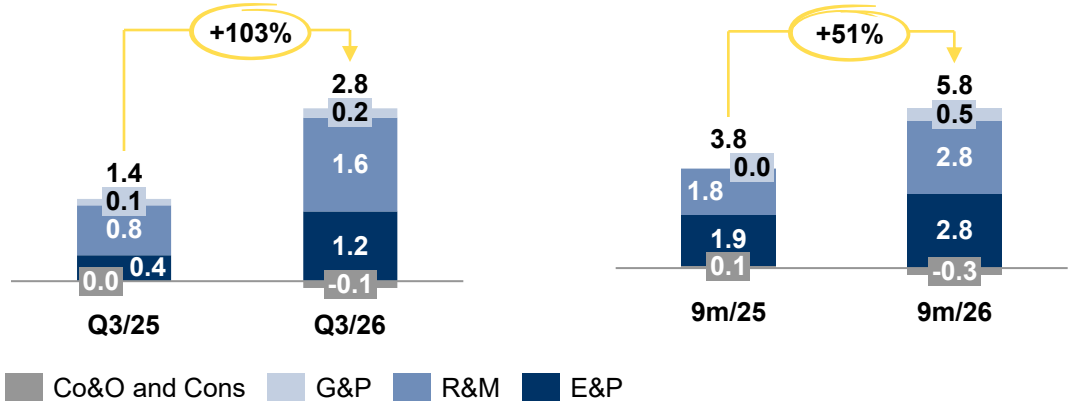
Brazi net electrical output

TWh

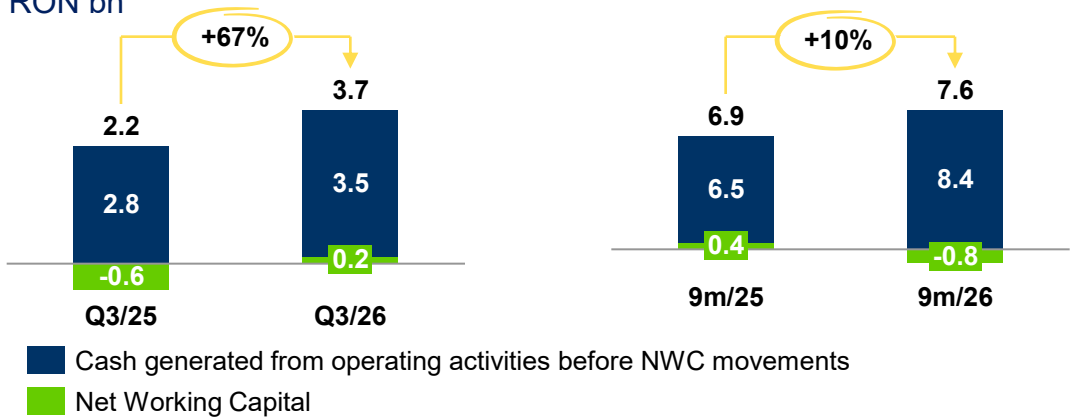


Resilient results; strong cash generation

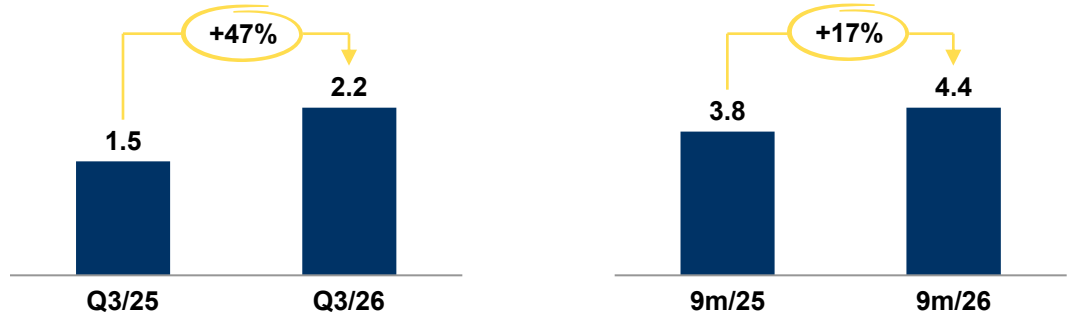
Clean CCS Operating Result
RON bn



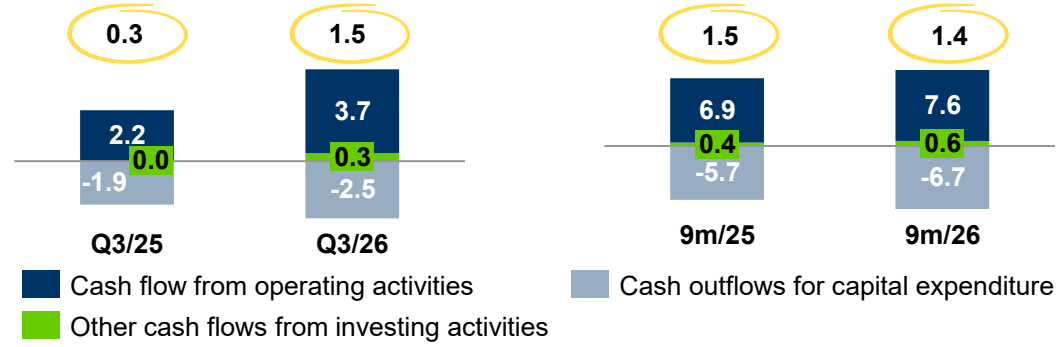
Cash Flow from Operating Activities
RON bn



Clean CCS Net Income[1]
RON bn



Free Cash Flow[2]
RON bn



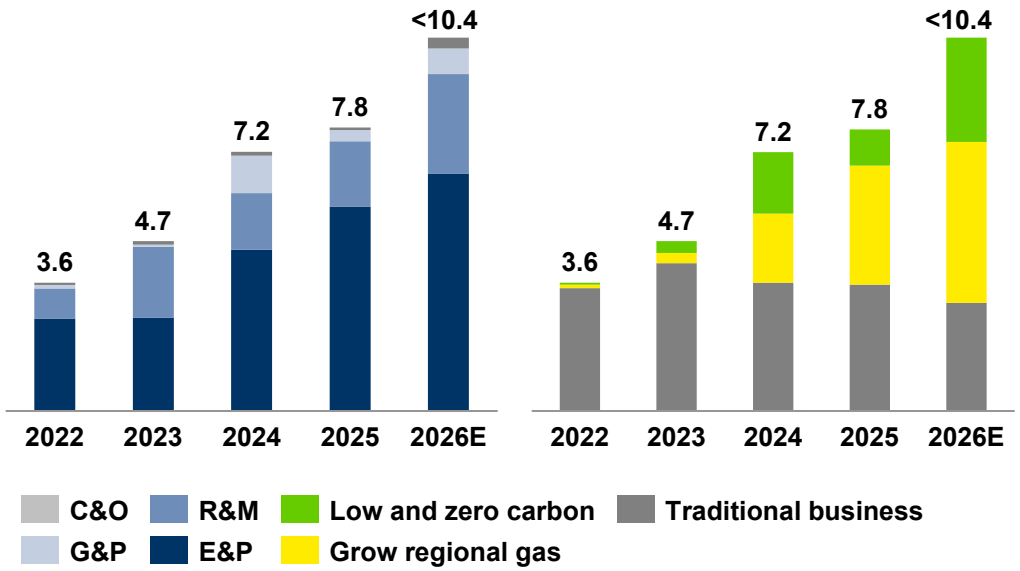
[1] Attributable to stockholders of the parent; [2] Before dividends

Strong progress in the most intensive investment period in our history

Group CAPEX[1]

RON bn

per business segment and strategic pillar



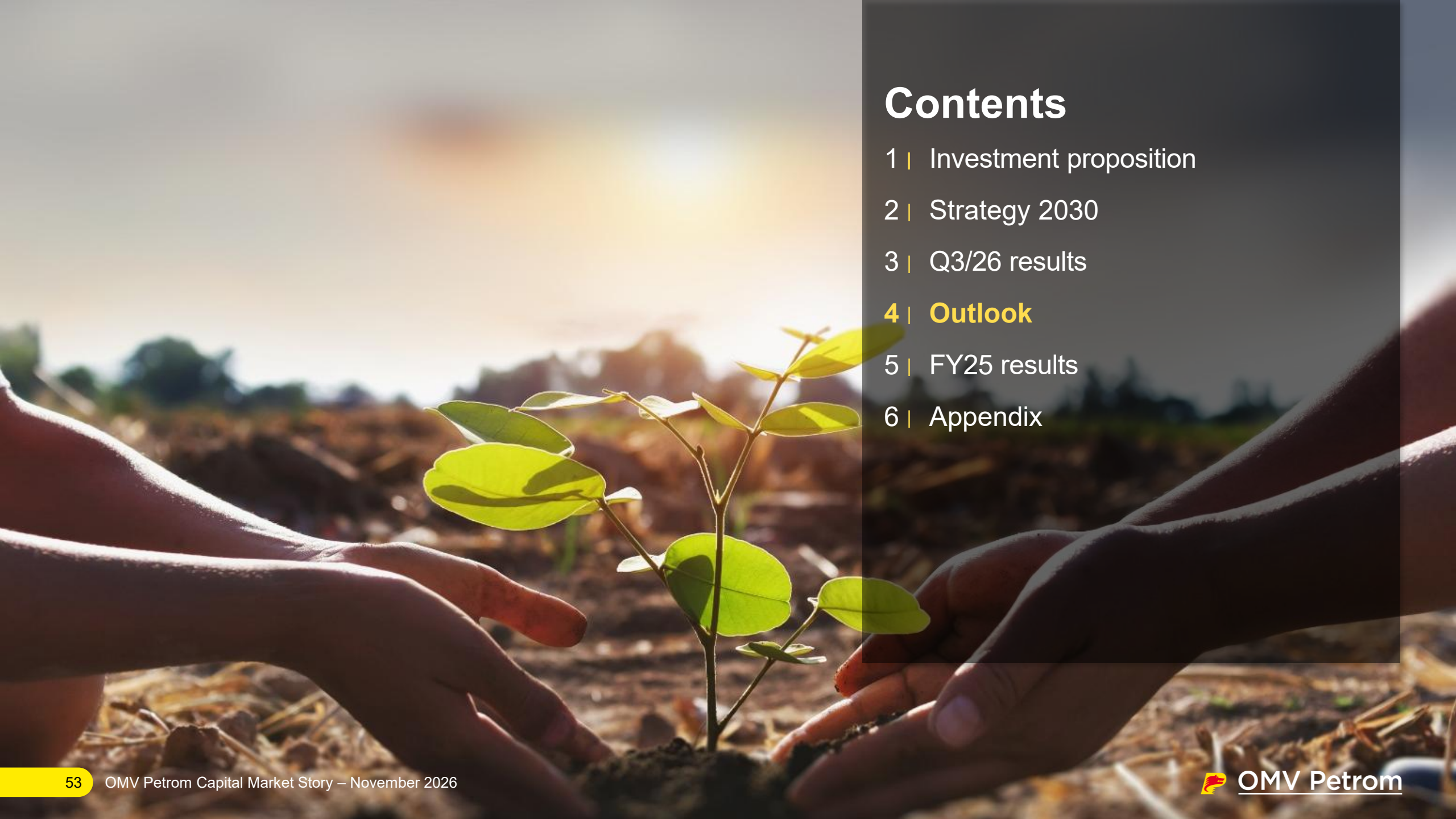
9m/26

- **RON 6.6 bn:**
  - Neptun Deep project in execution phase
  - 18[2] new wells and sidetracks; >410 workovers
  - New aromatic unit
  - SAF/HVO[3] unit in Petrobrazi
  - Renewable power projects

2026E

- **RON <10.4 bn:**
  - Neptun Deep project
  - Wells and sidetracks: ~30[2]; ~540 workovers
  - SAF/HVO[3] unit in Petrobrazi
  - Renewable power projects
  - Potential inorganic CAPEX: <RON 0.4 bn

[1] CAPEX including E&A; [2] Excluding Neptun Deep development wells and PECs; [3] SAF/HVO: sustainable aviation fuel (bio jet) and hydrotreated vegetable oil



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OMV Petrom

Guidance for 2026-2028

Indicators	Actual 9m/26	Assumptions / Targets 2026	Assumptions / Targets 2027-2028 averages[1]
Brent oil price	USD 94/bbl	USD >95/bbl (prev.: USD 85-95/bbl)	USD 75/bbl
Production[2]	101.7 kboe/d	>100 kboe/d	>140 kboe/d (prev.: >130 kboe/d)
Refining margin	USD 26.5/bbl[3]	USD >20/bbl (prev.: USD >15/bbl)	USD 8-9/bbl
CAPEX	RON 6.6 bn	RON <10.4 bn (prev.: RON <9.4 bn)	RON ~6 bn
FCF before dividends	RON 1.4 bn	Neutral (prev.: Negative)	Positive

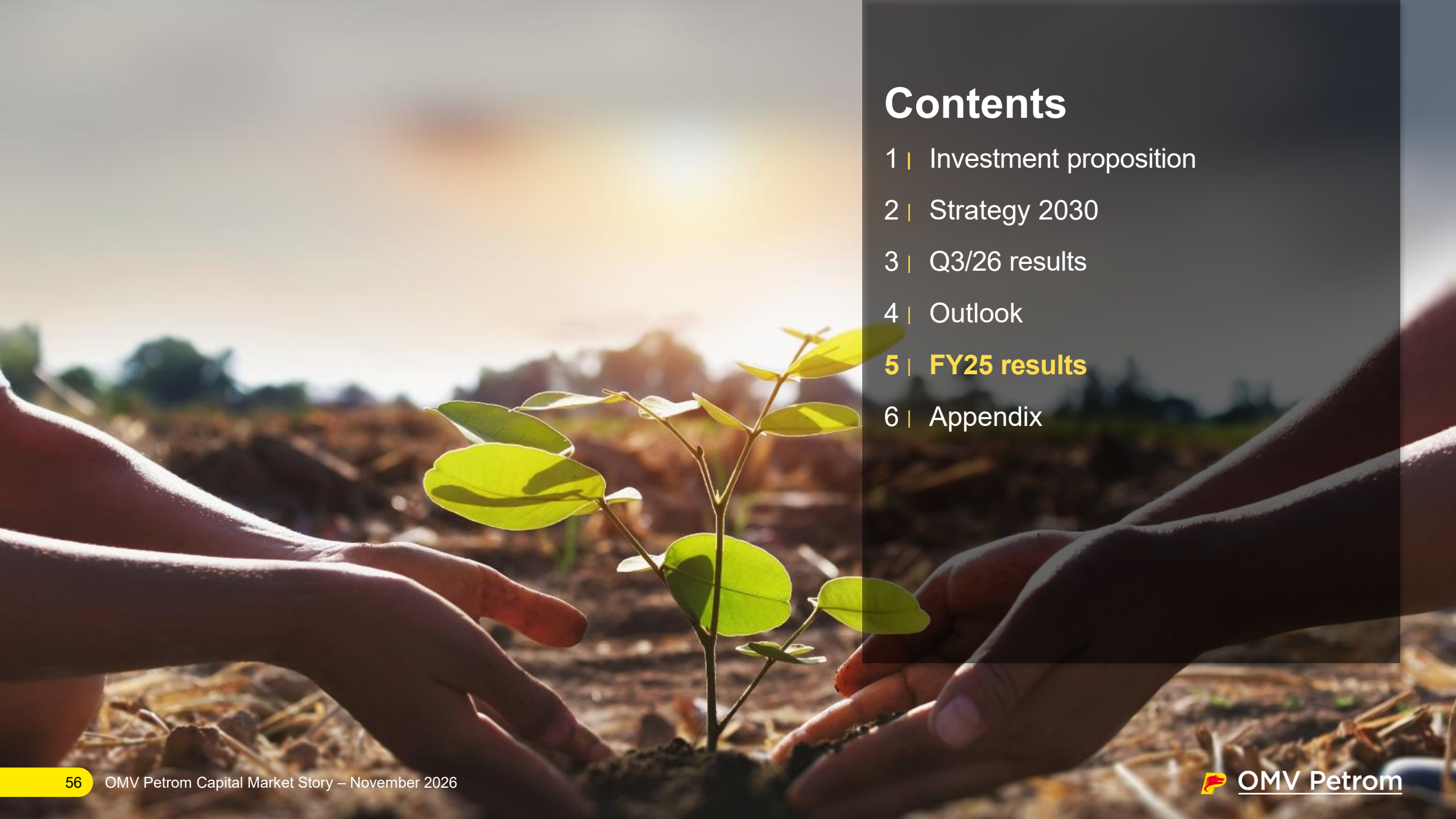
[1] Under review; [2] Considering no divestments; [3] Market indicator margin, not adjusted for OUG 19/2026 provisions applicable in Q2/26

Sensitivities

EBIT impact in 2026

2026 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 10 USD cents	~EUR +70 mn

In the context of the ongoing crisis in the Middle East, the associated market disruptions and increased government interventions have materially affected the usual correlations and trends, thus the sensitivities of OMV Petrom operating result to crude oil prices and indicator refining margins have only limited relevance.



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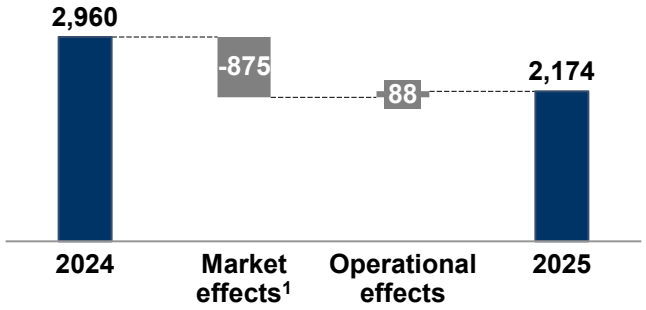
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OMV Petrom

Resilient results in all business segments

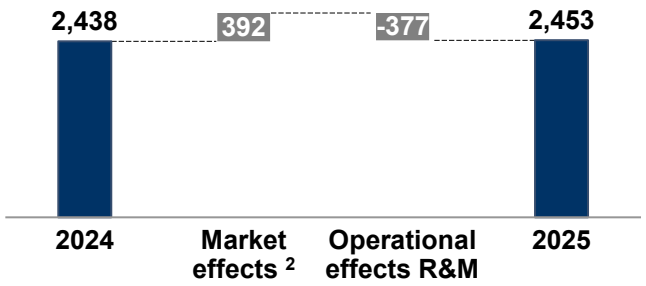
E&P
RON mn



- Realized crude price -16%
- Hydrocarbon sales -5%
- Unfavourable FX
- Higher royalties and gas over-taxation
- Higher production costs

- Higher realized gas price
- Net positive impact from litigations
- Lower depreciation and exploration expenses

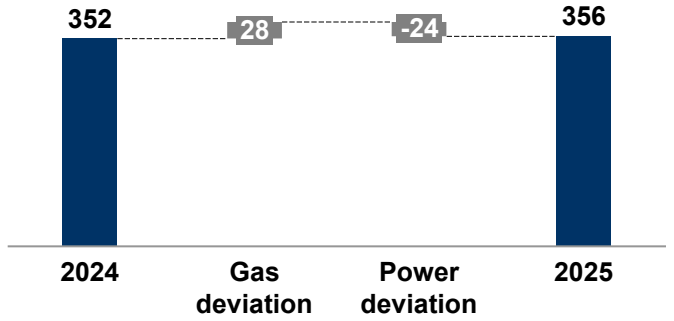
R&M
RON mn



- Refining margins +35%
- Retail sales +1%

- Higher costs including depreciation
- Lower refinery utilization
- Lower refined product sales

G&P
RON mn



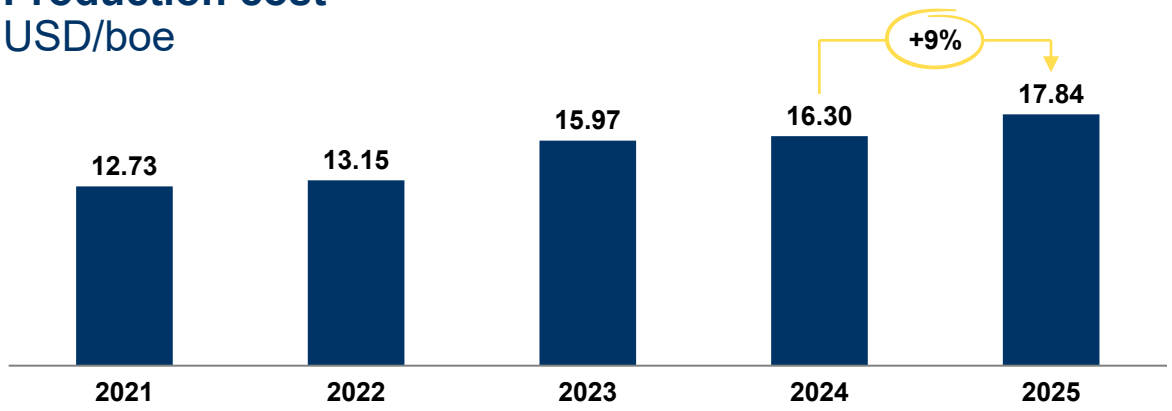
- Higher gas sales volumes
- Higher electricity sales volumes
- Good margins on electricity from 3rd parties and on balancing and ancillary services

- Power market regulated until June 2025
- Lower net electrical output

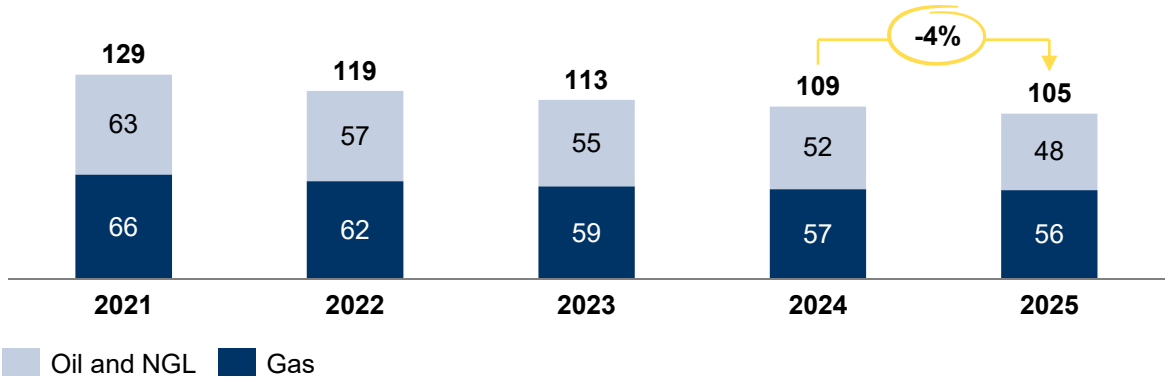
[1] Market effects defined as oil and gas prices, foreign exchange impact on revenues, price effect on royalties (including gas over-taxation); [2] Market effects based on refining indicator margin

Exploration & Production

Production cost
USD/boe



Hydrocarbon production
kboe/d



Key drivers 2025 vs. 2024

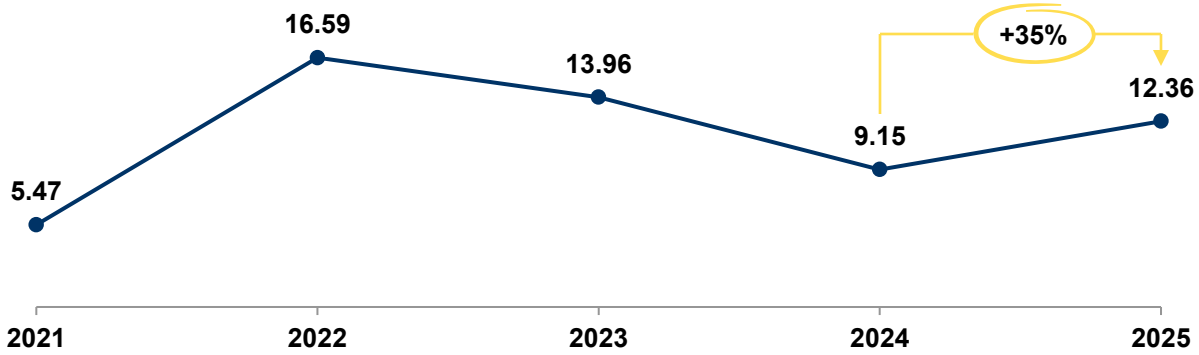
- Lower production available for sale
- Unfavorable FX
- New construction tax

- Natural decline
- Planned maintenance activities

- Contribution from workovers and new wells

Refining & Marketing

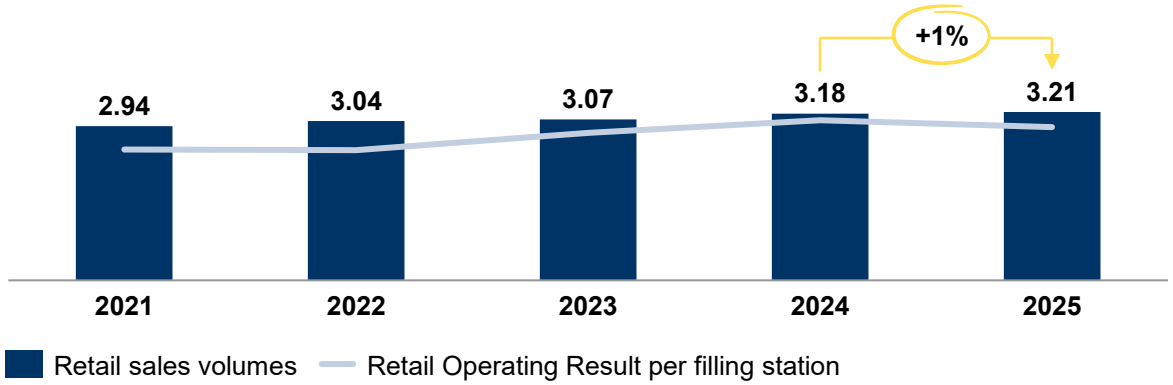
OMV Petrom Indicator refining margin
USD/bbl



Key drivers 2025 vs. 2024

- Higher crack spreads for middle distillates

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



- Retail sales +1%
- Slightly improved non-fuel business contribution
- Retail operating result per filling station[1]
  +4.5% CAGR 2021-2025

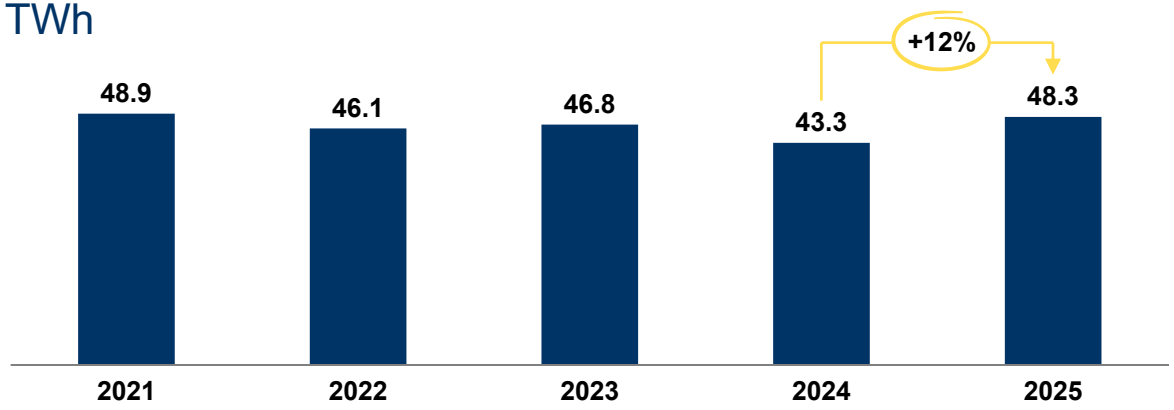
- Refined product sales -5% (refinery planned shutdown in 2025)

[1] Retail including Cards business

Gas & Power

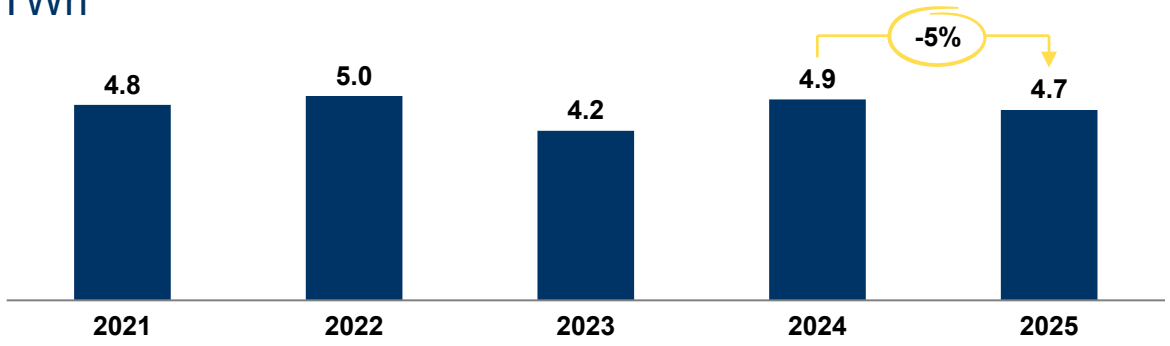
Gas sales volumes

TWh



Brazi net electrical output

TWh

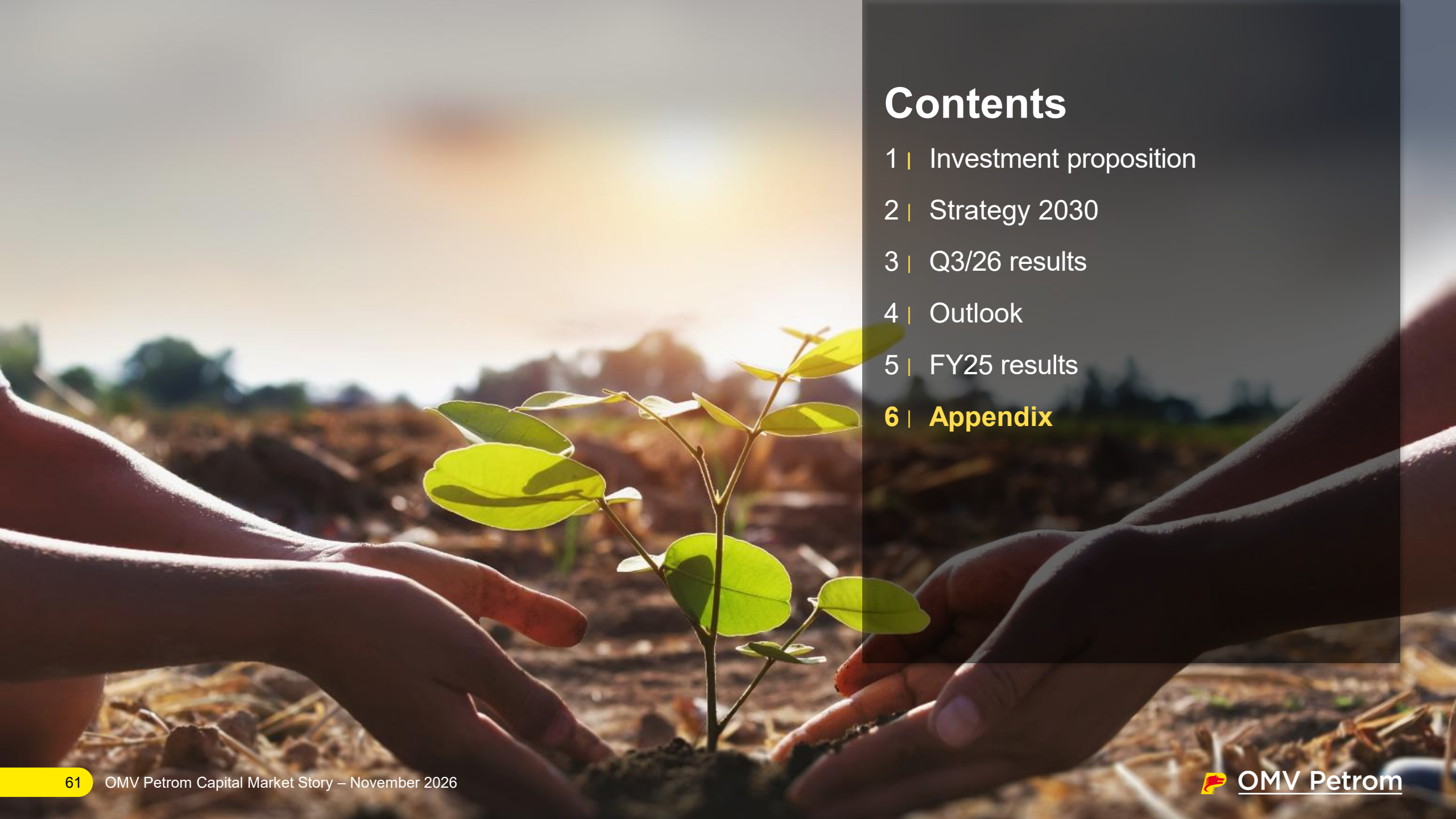


Key drivers 2025 vs. 2024

- Larger volumes to wholesales and end users
- Higher 3rd party acquisitions
- Higher obligation for the gas regulated market (10.9 TWh)

- MACEE[1] no longer applicable in 2025 (in place between Jan 1, 2023 and Dec 31, 2024)
- Higher sales prices and volumes of electricity
- Power market regulated until June 2025, leading to lower production, despite shorter planned shutdown of Brazi power plant

[1] Centralized Electricity Purchasing Mechanism



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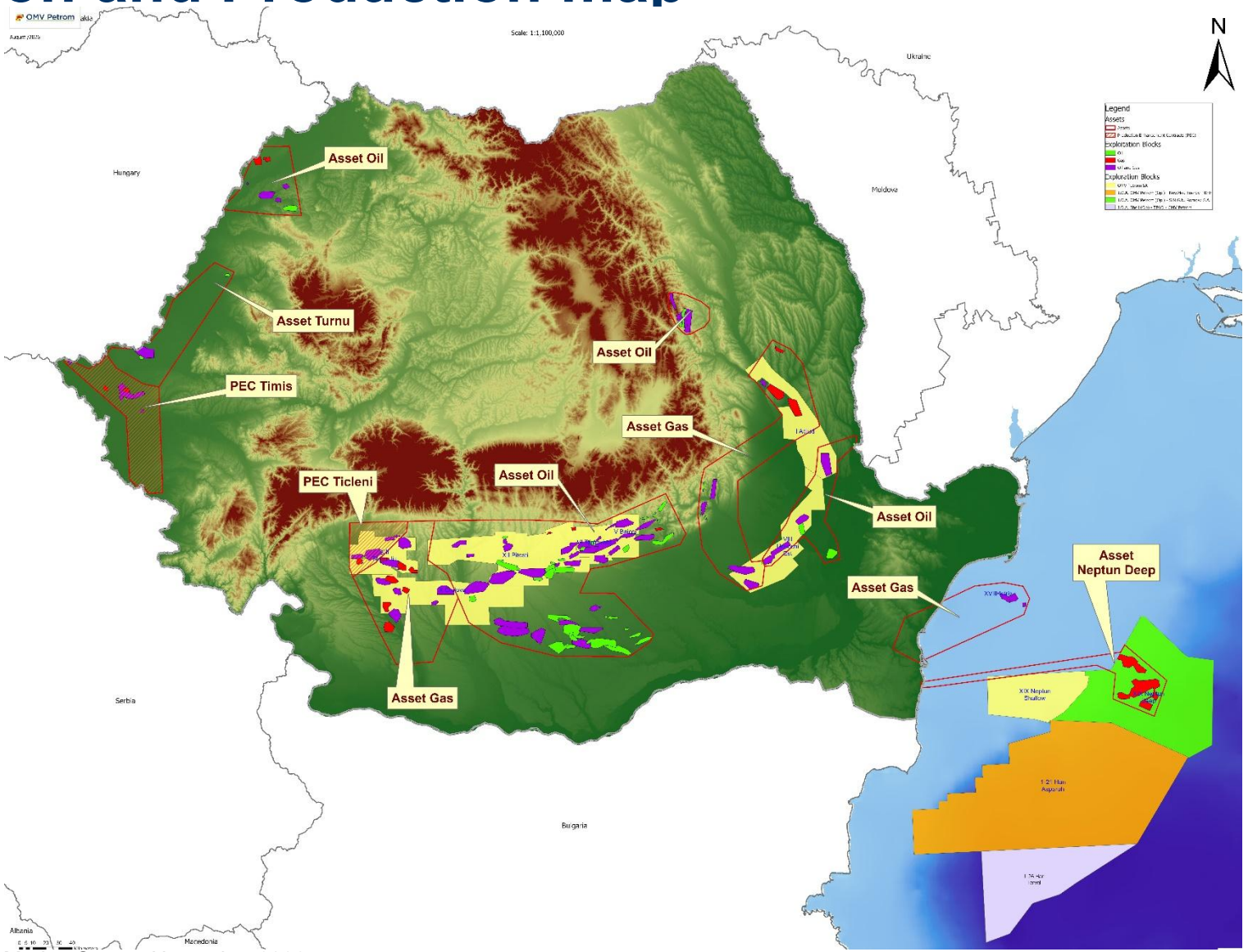
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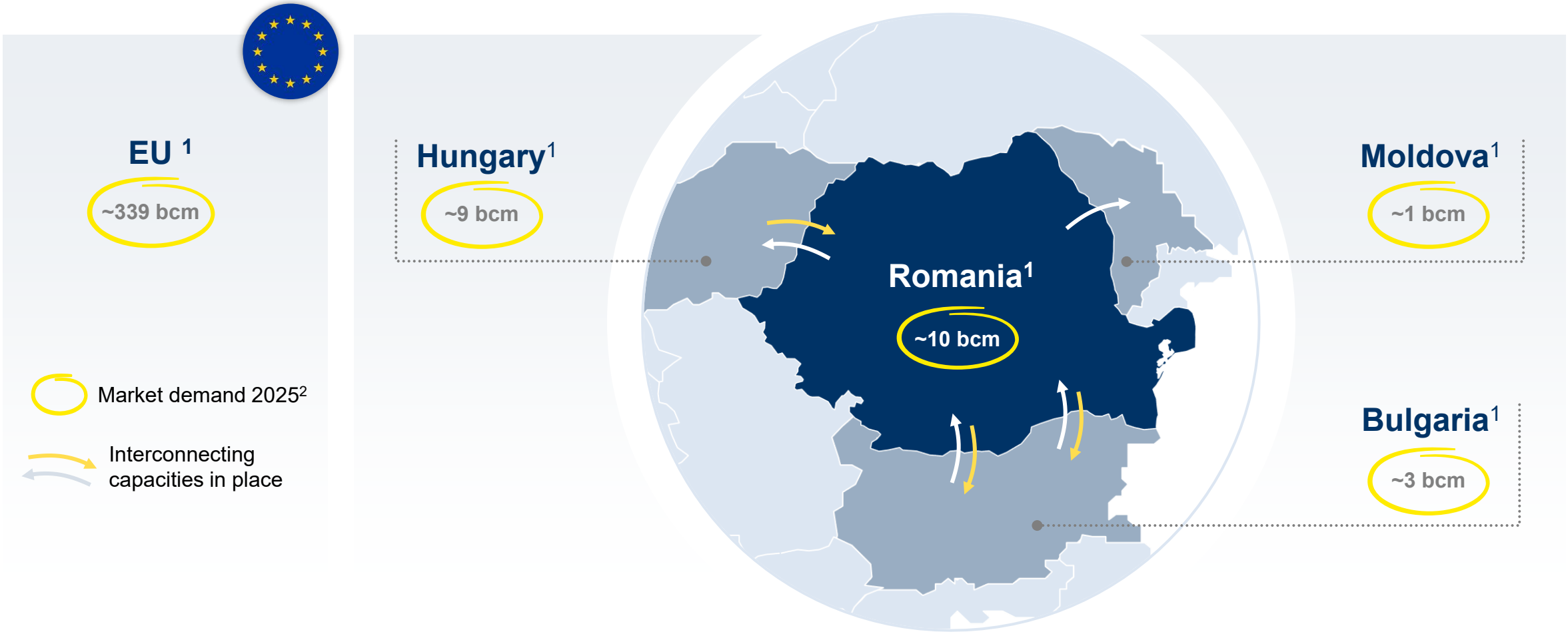
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OMV Petrom

Exploration and Production map



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



[1] Net importer; [2] Latest available data

Romanian oil market

2025 overview estimation

Crude Supply

Production:
OMV Petrom

23%

Imports:
various

77%

Transportation: Conpet

Refineries

Refineries
combined nameplate capacity
~13 mn tpa

Processed crude oil[1]
~11.5 mn t pa of which
~ 8.9 mn t from import

66%

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

Petroleum products imports

34%

Distribution

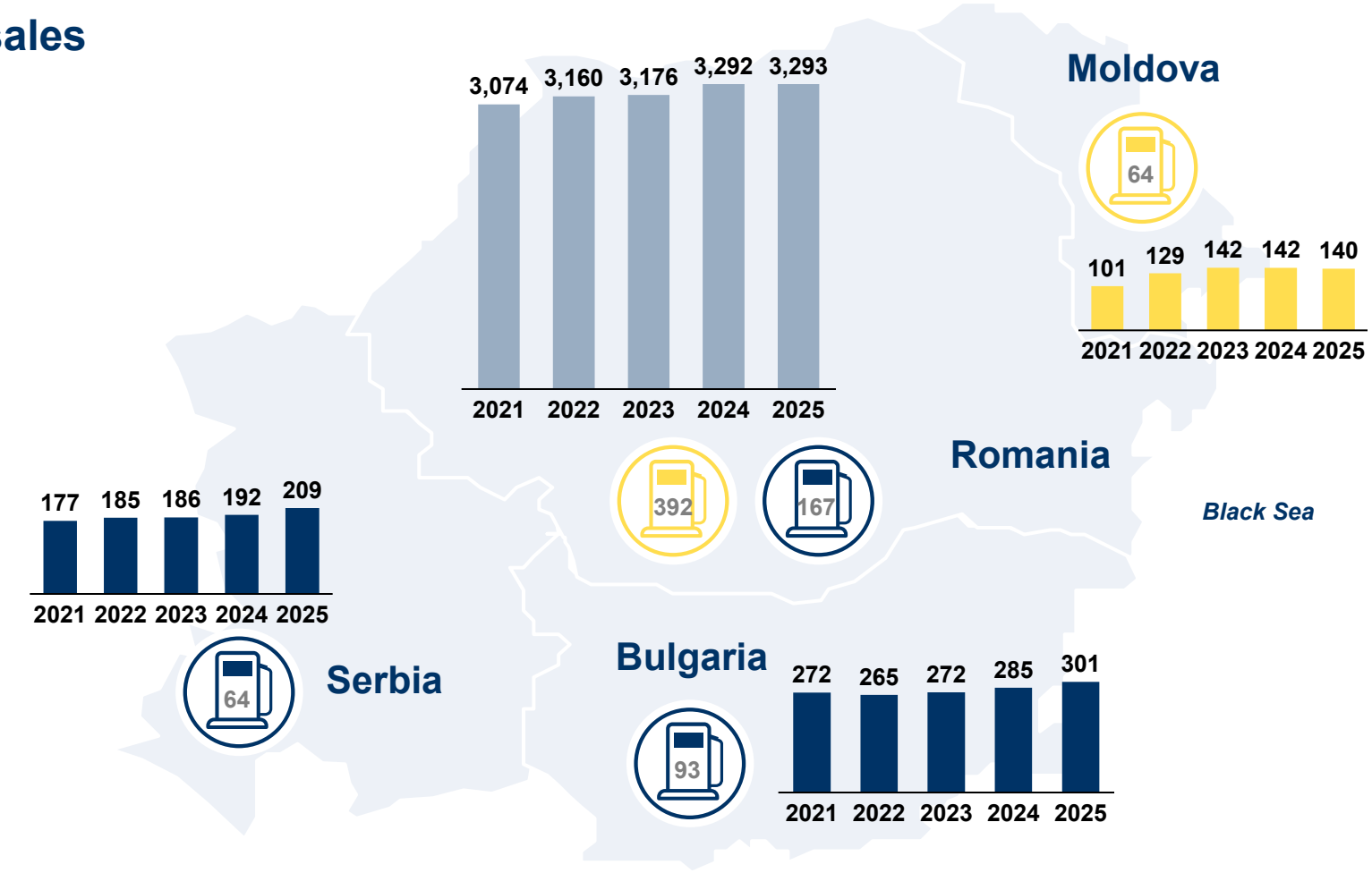
OMV

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 2025

Retail fuel sales
mn l



780 Total number of filling stations

Romanian gas market

2025 overview

Regulatory

Regulatory Body

Romanian Energy Regulatory Authority (ANRE)

Supply

Production:

OMV Petrom

Romgaz, BSOG,…

90%

Net imports: various

10%

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 market reports

Romanian power market

2025 overview

Regulatory

Regulatory Body

Romanian Energy Regulatory Authority (ANRE)

Supply

Production:

Coal	14%
Gas	20%
Nuclear	22%
Renew-ables	19%
Hydro	25%

Imports

Transport & Distribution System Operator (TSO & DSO)

Market(s)

- Mid/long term fwd contract market(s) (OPCOM / bilateral)
- Spot (DAM / ID) market (OPCOM)
- Ancillary services & Balancing market (TSO)
- Cross border market

Distribution

Distribution Operators (DSO)

Demand

- Internal market
- Export

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

Cash flow Statement

RON mn	2021	2022	2023	2024	2025
Cash flow from operating activities (CFO)	**6,997**	**11,337**	**10,114**	**6,465**	**9,000**
Thereof, Change in net working capital (NWC)	-433	-3,544	1,915	-680	767
Cash flow from investing activities (CFI)	**-2,253**	**-3,104**	**-5,730**	**-5,771**	**-6,432**
Cash flow from financing activities (CFF), of which	**-1,914**	**-4,300**	**-5,300**	**-4,818**	**-4,585**
Dividends paid	-1,741	-4,438	-5,102	-4,410	-3,925
Cash and equivalents at end of period	**10,323**	**14,256**	**13,339**	**9,219**	**7,202**
Free cash flow (FCF)	4,744	8,232	4,384	694	2,569
Free cash flow after dividends	**3,003**	**3,794**	**-717**	**-3,717**	**-1,356**

Income Statement

RON mn		2021	2022	2023	2024	2025
Sales		**26,011**	**61,344**	**38,808**	**35,765**	**36,592**
Clean CCS Operating Result		**4,346**	**12,198**	**8,482**	**5,729**	**5,169**
Thereof	Exploration & Production	1,814	5,433	4,177	2,960	2,174
	Refining & Marketing	2,041	4,019	2,480	2,438	2,453
	Gas & Power	781	2,942	2,145	352	356
	Corporate and Other	-87	-96	-93	-96	-110
	Consolidation	-203	-99	-227	75	296
Operating Result		**3,709**	**12,039**	**7,554**	**4,855**	**2,756**
Financial result		-311	17	263	113	810
Solidarity contribution on refined crude oil				-2,729		
Taxes on income		-534	-1,756	-1,058	-778	-508
Net income[1]		**2,864**	**10,301**	**4,030**	**4,190**	**3,058**
Clean CCS net income[1]		**3,353**	**10,273**	**7,464**	**4,900**	**5,059**

[1] Attributable to stockholders of the parent

Operating Result

RON mn		2021	2022	2023	2024	2025
Clean CCS Operating Result		**4,346**	**12,198**	**8,482**	**5,729**	**5,169**
Thereof	Exploration & Production	1,814	5,433	4,177	2,960	2,174
	Refining & Marketing	2,041	4,019	2,480	2,438	2,453
	Gas & Power	781	2,942	2,145	352	356
	Corporate and Other	-87	-96	-93	-96	-110
	Consolidation	-203	-99	-227	75	296
Operating Result		**3,709**	**12,039**	**7,554**	**4,855**	**2,756**
Thereof	Exploration & Production	1,660	3,612	4,170	2,323	-297
	Refining & Marketing	2,663	4,076	2,318	2,238	2,280
	Gas & Power	-253	4,662	1,474	364	570
	Corporate and Other	-99	-250	-161	-127	-116
	Consolidation	-263	-61	-248	57	319

Financial performance

Key indicators

in RON mn	2021	2022	2023	2024	2025	Q1/25	Q2/25	Q3/25	Q4/25	Q1/26	Q2/26	Q3/26
Sales	26,011	61,344	38,808	35,765	36,592	8,953	8,074	9,809	9,756	9,574	11,740	13,851
Clean CCS Operating Result	4,346	12,198	8,482	5,729	5,169	1,263	1,188	1,368	1,350	1,465	1,505	2,782
Operating Result [1]	3,709	12,039	7,554	4,855	2,756	1,242	954	1,146	-587	1,343	1,152	2,788
Operating result before depreciation	7,209	17,159	10,812	9,026	7,052	2,085	1,725	2,257	984	2,284	2,114	3,697
Clean CCS net income attributable to stockholders	3,353	10,273	7,464	4,900	5,059	1,072	1,210	1,527	1,250	1,128	1,066	2,249
Net income attributable to stockholders	2,864	10,301	4,030	4,190	3,058	1,070	1,019	1,345	-375	1,028	774	2,256
Cash flow from operating activities	6,997	11,337	10,114	6,465	9,000	2,664	2,012	2,190	2,134	2,654	1,250	3,651
Free cash flow after dividends	3,003	3,794	-717	-3,717	-1,356	1,092	-2,646	315	-117	634	-4,120	1,238
Non-current assets	32,655	32,218	35,373	38,756	43,380	40,249	41,184	43,328	43,380	43,852	45,986	47,878
Total equity	34,214	40,508	39,379	39,118	38,177	40,188	38,456	39,803	38,177	39,204	36,402	38,668
Net debt / (cash)	-9,391	-13,463	-12,551	-8,076	-5,176	-8,097	-5,450	-5,748	-5,176	-5,772	-1,592	-2,782
CAPEX	2,821	3,551	4,704	7,171	7,841	1,403	1,913	1,914	2,612	1,594	2,152	2,891
Clean CCS EPS (RON) [2]	0.0550	0.1679	0.1198	0.0786	0.0812	0.0172	0.0194	0.0245	0.0201	0.0181	0.0171	0.0361
EPS (RON) [2]	0.0470	0.1684	0.0647	0.0672	0.0491	0.0172	0.0163	0.0216	- 0.0060	0.0165	0.0124	0.0362
Clean CCS ROACE (%)	13%	38%	27%	15%	14%	13%	13%	13%	14%	14%	14%	16%
Dividend per share (gross, RON)	0.0791 [3]	0.0825 [4]	0.0713 [5]	0.0644 [6]	0.0578 [7]							
Payout ratio from net profit	156% [3]	50% [4]	110% [5]	96% [6]	118% [7]							
Payout ratio from operating cash flow	64% [3]	45% [4]	44% [5]	62% [6]	40% [7]							
P/E ratio	10.6	2.5	8.9	10.6	20.3							
Employees at the end of the period	7,973	7,742	7,714	10,545	9,438	10,445	10,158	9,939	9,438	9,317	9,296	9,216

[1] Specific E&P taxes in Romania for 9m/26 amounted to RON 2,057 mn, representing ~23% of total E&P hydrocarbon revenues, and include royalties (RON 676 mn) and supplementary oil and gas taxation (RON 1,060 mn), E&P part of the solidarity tax (RON 288 mn out of total RON 427 mn) and E&P part of tax on revenues (RON 32 mn of total RON 213 mn). Offshore gas specific taxes account for ~17% of E&P offshore gas revenues. Tax on constructions accrued for the full year at RON 74 mn was paid in May 2026.

Specific E&P taxes in Romania for 2025 amounted to RON 1,453 mn, representing ~16% of total E&P hydrocarbon revenues, and include royalties (RON 747 mn) and supplementary oil and gas taxation (RON 669 mn) and E&P part of tax on revenues (RON 37 mn of total RON 205 mn). Offshore gas specific taxes account for ~13% of E&P offshore gas revenues. G&P supplementary gas and power taxation amounted to RON 169 mn. New Newly introduced tax on constructions accrued for the full year at RON 69 mn was paid in May 2025.

[2] Figures from previous periods have been adjusted retrospectively as per IFRS requirements following the share capital increase finalized in 2022; [3] Includes RON 0.0341 base dividend for 2021 and special dividend of RON 0.0450/share declared and paid in 2022; [4] Includes RON 0.0375 base dividend for 2022 and special dividend of RON 0.0450/share declared and paid in 2023; [5] Includes RON 0.0413/share base dividend for 2023 and RON 0.0300/share special dividend declared and paid in 2024; [6] Includes base dividend of RON 0.0444/share for 2024 and special dividend of RON 0.0200/share, declared and paid in 2025; [7] Includes RON 0.0466/share base dividend for 2025 and RON 0.0112/share special dividend, both paid starting June 8, 2026.

Contact

OMV Petrom S.A.
22 Coralilor St, District 1,
Petrom City, Bucharest

OMV Petrom Investor Relations
investor.relations.petrom@petrom.com
www.omvpetrom.com
Tel: +40 372 161 930

Financial calendar 2027

February 4: Q4 2026 results
April 22: Annual General Meeting of Shareholders
April 29: Q1 2027 results
July 30: Q2 2027 results
October 29: Q3 2027 results