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ADNOC DISTRIBUTION

ADNOC INVESTOR MAJLIS

مجلس أدنـوك للمستثمـرين

8th October 2025

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LEADING MOBILITY RETAILER, STRONG PROVEN TRACK-RECORD OF VALUE CREATION

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UAE's

#1

FUEL AND CONVENIENCE RETAILER operations in KSA and Egypt

HOMEGROWN SPECIALTY COFFEE SHOP

LUBRICANTS BRAND

3RD LARGEST LISTED FUEL RETAILER GLOBALLY BY MARKET CAP

DELIVERED CONTINUED EBITDA GROWTH

+70%

Increase in EBITDA since IPO[1]

>$1bn

EBITDA exceeded in 2023

DELIVERED INDUSTRY-LEADING RETURNS - high value accretive investments

c.30%

5-year Return on Capital Employed

ENHANCED COST EFFICIENCY

>$200mn

OPEX savings since IPO

30% less cost per liter

STRONG SHAREHOLDER PAYBACK

>$5bn

Total dividend distribution since IPO

LEADING INDUSTRY MARGINS & LONG-TERM SUPPLY AGREEMENT resilient business model

+60%

Cashflows secured by long-term ADNOC fuel supply contract

1. *From 2017 to 2024*

WE ARE COMMITTED TO DELIVER HIGHER & SUSTAINABLE GROWTH AND FUTUREPROOFING THE BUSINESS

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Accelerating momentum- executing 2024-2028 **smart growth strategy,** across fuel and non-fuel retail [1].

$250-300m

CAPEX - Focusing 70% On Growth

Robust balance sheet to support **EPS and DPS accretive growth aspiration**

Building on strong **non-fuel retail growth momentum**

15%+

Annual growth in non-fuel retail over the last 5 years

Rebrand Oasis by ADNOC
Upgrade car wash, lube change, and unlocking additional property value

Leading the energy transformation– Deploying highly-profitable EV charging

500-750

Fast And Super-Fast EV Charging Points By 2028

Strategic partnerships, enabling further growth

نون noon

LANDMARK GROUP

among others

Advancing AI initiatives: accelerating growth, boosting efficiency and enhancing customer experiences

+20

AI Initiatives In Development,
further enabled by ADNOC Rewards app, with **~2.5** million members

1. *Non-fuel retail segment includes convenience stores, car wash, lube change, property management and vehicle inspection.*

AI-FIRST BY DESIGN & AT SCALE. ACCELERATING GROWTH, BOOSTING EFFICIENCY, ENHANCING CUSTOMER EXPERIENCES

Realtime Monitoring & Alerts

Heat Maps & Stockouts

Seamless Checkout

Intelligent assortment

Personalized Welcome Screen

Welcome Muhammad

Cleaning Alert: Spill in aisle 5

20+ AI Initiatives

Gen AI Chat

ACCELERATING GROWTH

Smart Retail Operations optimized with Computer Vision and AI-driven predictions …

Market Basket Analysis

Next best offer

Customer Info

BOOSTING EFFICIENCY

Fuel Demand Prediction

Smart Workforce Automation

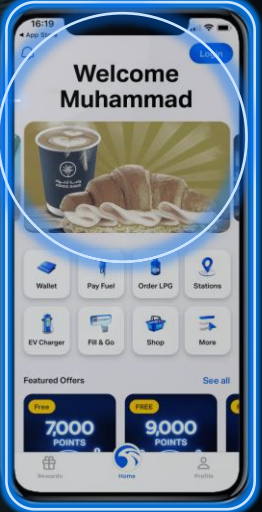
Lubricants Automation

ENHANCED EXPERIENCE

Targeted Offers

In App Ordering

AI Enabled CX Support



STRONGER OUTLOOK: ACCELERATING NON-FUEL RETAIL MOMENTUM

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Upgrading **network expansion** target

1,150

Service stations by 2028

+15%
vs. previously announced target of 1,000

Doubling **NFR**[1] transactions

+100%

growth by 2030

vs. previously announced target of
+50% increase in 2023-2028

TheHub. by ADNOC

1st launch in November

30 new retail destinations

3X larger retail footprint

Fun, Family, Fuel, F&B, and Fix

1. *Includes convenience stores, car wash, lube change transactions.*

REINFORCING SHAREHOLDER COMMITMENT: GREATER DIVIDEND VISIBILITY, QUARTERLY RETURNS

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5-YEAR DIVIDEND POLICY

Now extended to 2030(1)

(vs. 2028 previously)

20.57 fils per share

$700 or **min. 75% of net profit,** whichever is higher

~6% yield(2)

QUARTERLY DIVIDEND

The payment framework

effective Q1 2026

1. *Dividend policy amendment proposal will be presented for shareholders' approval at the AGM in March 2026.*
2. *At share price of AED 3.x on 7th October 2025.*


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DISCIPLINED IN EXECUTION, BOLD IN AMBITION, FUTURE READY
WE WELCOME YOU ON THIS JOURNEY