

ASX ANNOUNCEMENT

19 March 2026

Investor Presentation Webinar – 19 March 2026 at 2:00 pm AEDT

EPX Limited (**ASX: EPX**) (EPX or the 'Company') wishes to inform shareholders of the enclosed investor presentation, to be presented at the Company Webinar at 2.00 pm on 19 March 2026.

This announcement has been authorised for release to the ASX by the Board of EPX.

For more information, please contact:

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Chief Financial Officer

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About epX

EPX, the most trusted building efficiency platform provider, is a data as a service platform that delivers sector leading cost and energy efficiency in buildings. EPX is a global leader in reducing energy costs and delivering energy efficiency in the built environment.

EPX's proven proprietary EDGE and EDGE Industrial cloud technology delivers energy cost and GHG emissions reduction in commercial real estate with control capability to manage critical energy and infrastructure assets. It is a data repository collecting and analysing more than 5.6 billion points of data per annum with proprietary algorithmic analysis and machine learning.

Our EDGE platform collects BMS, metering and broad operational data from 700+ buildings, 7.5+ million sqm portfolio, in over 25 countries. It accurately identifies operational inefficiencies, building performance and maintenance improvements and CO2e reduction opportunities and provides auditable insights that on average deliver 21% reduction in energy consumption. It is rapidly deployable and able to deliver immediate visibility and automation without full system overhauls.

Connect with us:

LinkedIn: <https://www.linkedin.com/company/epx-tech-optimisation/>

Website: www.epx.tech





FY26 - Half Year Results

31 December 2025

Presentation - March 2026



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WHO WE ARE AND WHY

Vision: *To be the planet's most impactful building performance platform provider*

Values:

- *Customer Obsessed*
- *Innovative*
- *Trusting & Trusted*
- *Always Better*



Buildings are responsible for approx. 28%¹ of global emissions - Our business is committed to reducing building energy consumption and Co2 emissions -



Proprietary technology – EDGE optimises, reduces and controls our customers energy consumption and has a track record of reducing costs by an average of 21%²



Collects and analyses multiple sources of build performance data - Unlike others in the market, we go deeper than the BMS and go where there is no BMS



Award winning certified solution³ – one of very few global organisations that has the certifications necessary to consistently deliver trusted data

1. Source: 2019 Global Status Report for Buildings and Construction, Global Alliance for Buildings and Construction, International Energy Agency and the United Nations Environment Programme, 2019
2. As at 30 June 2025 for the current portfolio: Hotels 15%; Commercial Office 21%; Retail 17%
3. Refer Appendix to this Presentation

Global Impact - goal of 1million tonnes of CO2e saved/avoided

As at Dec 2025, across our sites globally serviced by EDGE Insight/Insight+

FLOOR AREA MONITORED

5.8m SQM

up from 3.5m SQM as at June 25

ACTION ITEMS

Over 21,000

up from 5,500 as at June 25

FINANCIAL SAVINGS

Over A\$95m

Up from \$59m as at June 25

TCO2e Saved or avoided

Over 270,000 tonnes

up from 140,000t as at June 25

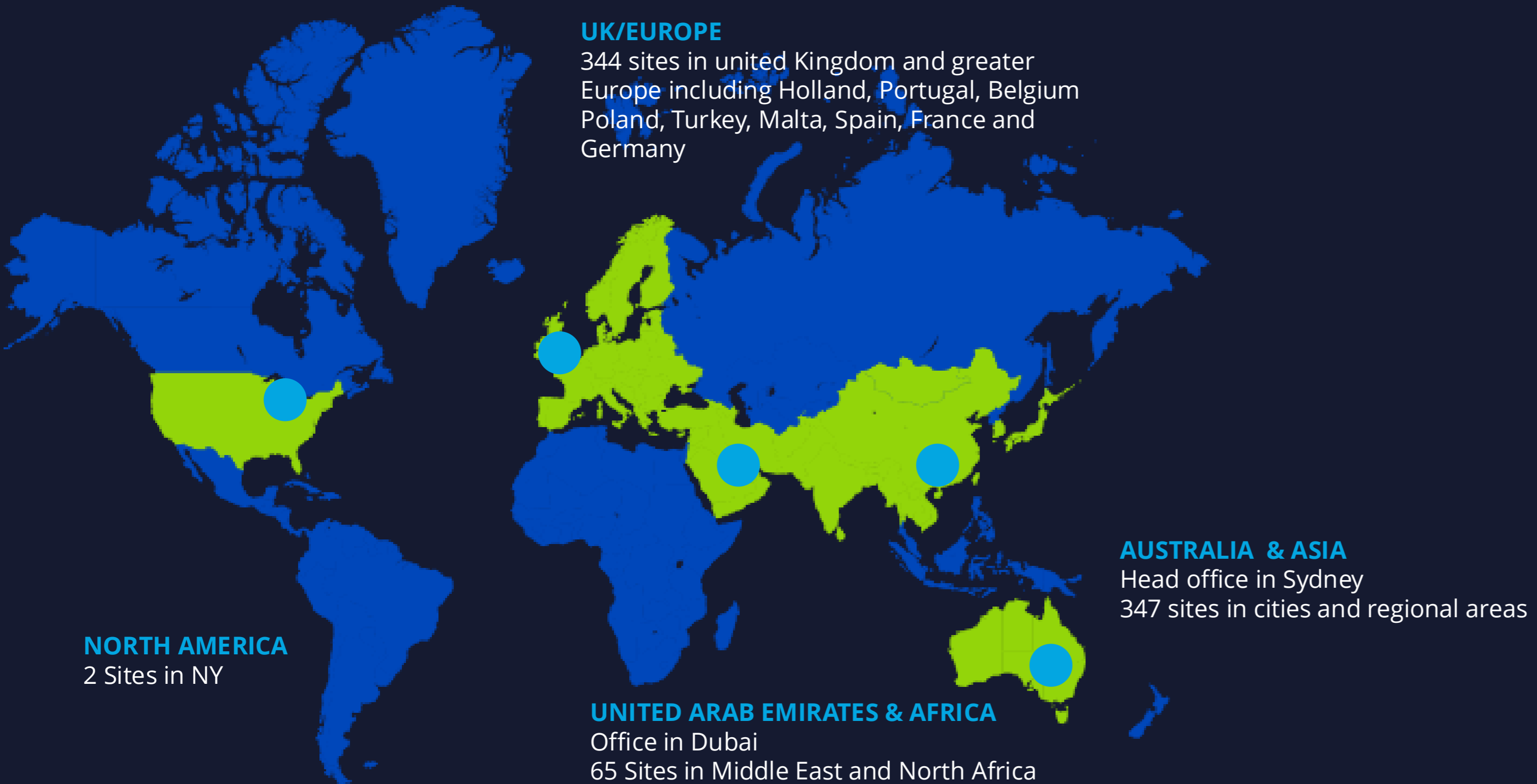
1. As at 31 December 2025, based on EDGE Insight/Insight+ data analytics savings that have been actioned and closed with the customers. A\$ savings achieved is based on various exchange rates as at the date of the saving being actioned and closed, and the actual value may be higher or lower based on the exchange rate at the time of measurement.
2. Calculated based on an approx. 22 kilograms of CO2 per year being absorbed by a mature tree.

CUSTOMER BASE

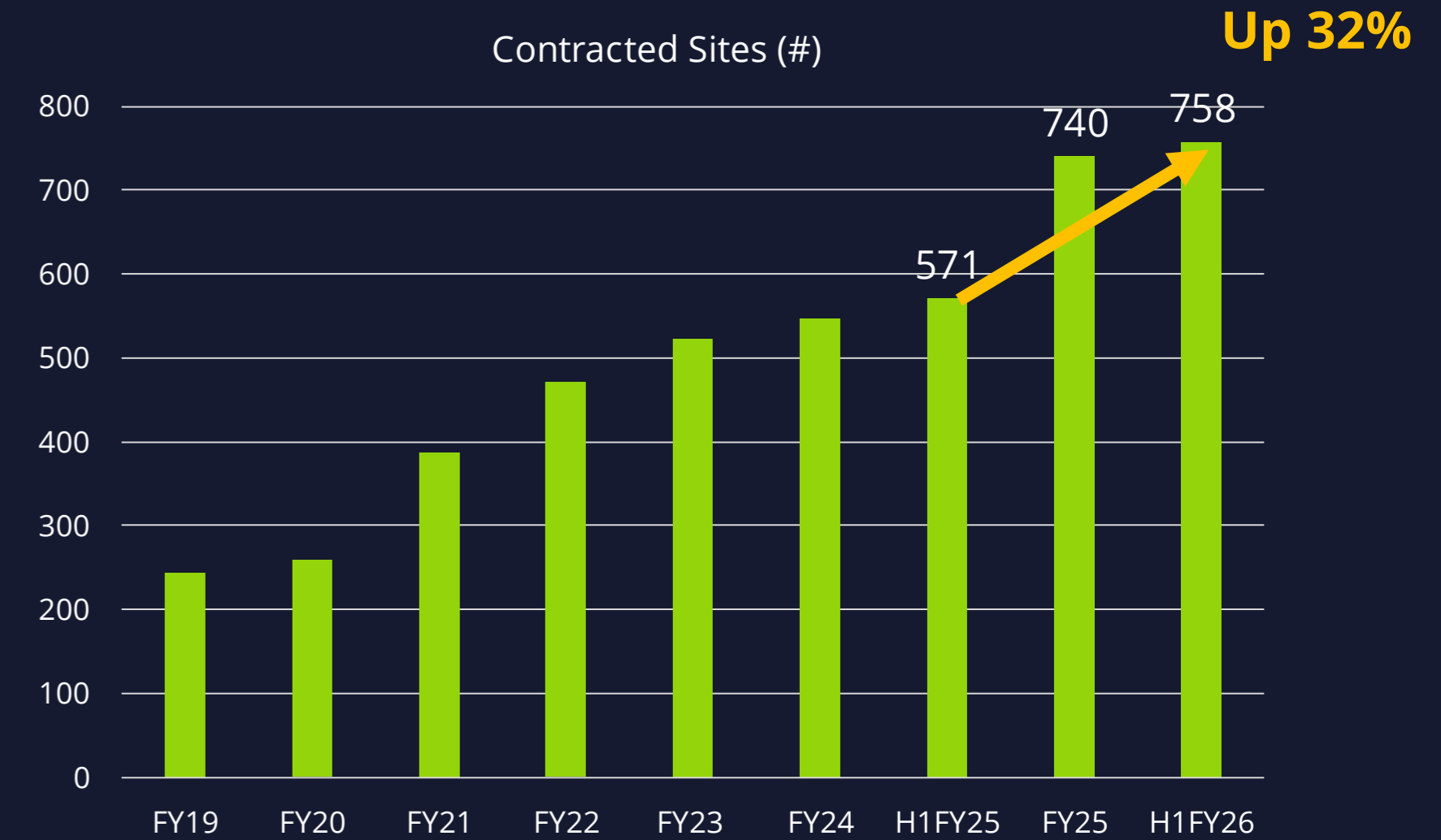


750+ SITES SPANNING OVER 25 COUNTRIES IN 5 CONTINENTS

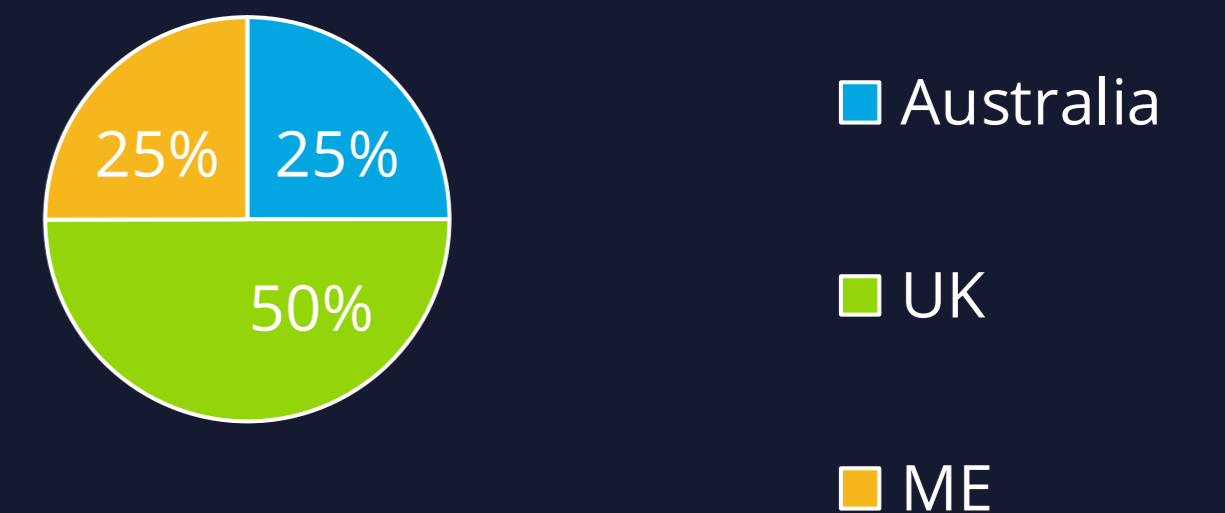
Site numbers continue to grow, monitoring over **1 billion kWh annually**



Contracted Site #s



Revenue by region %



BOARD AND KEY MANAGEMENT

**Paul
Oneile**



**Independent
Chairman**

Paul has over 35 years' experience across a variety of industries including roles within ASX listed technology companies. Paul was CEO of Aristocrat Leisure Ltd where he oversaw significant business and cultural change.

**John
Balassis**



**Executive
Director & CEO**

John has over 25 years in strategy and M&A across a range of industries including infrastructure, transportation and energy.

A former senior executive at KPMG and more recently CEO of an investee entity for a US based energy and resources investment firm, John has operated in both Australia and internationally.

**Victor van
Bommel**



**Independent
Non-executive
Director**

Victor has over 20 years' experience in Investment Banking and Real Estate with a very well-established network amongst world's leading Institutional Investors, Sovereign Wealth Funds and Real Estate companies.

**Elizabeth
Aris**



**Independent
Non-executive
Director**

Elizabeth is a senior technology and telecoms executive with experience across the US, China and Australia.

Elizabeth is a Non-Executive Director for Public and Private Companies in financial services and technology, Chair of the Remuneration and Audit Committees and an Adjunct Professor of University of Technology Sydney.

**Patrick
Harsas**



**Chief Financial
Officer**

Patrick is a Chartered Accountant with over 25 years across a range of industries including infrastructure and agriculture with Macquarie Group, fintech and environmental services.

Wide ranging experience including IPOs, M&A, PE sales, capital and debt markets.

CORPORATE SNAPSHOT



Strong Institutional Support ~56% ; Board/management ~6%

ASX: EPX

Share Price

A\$0.25

Fully Paid Ordinary Shares¹

86 million

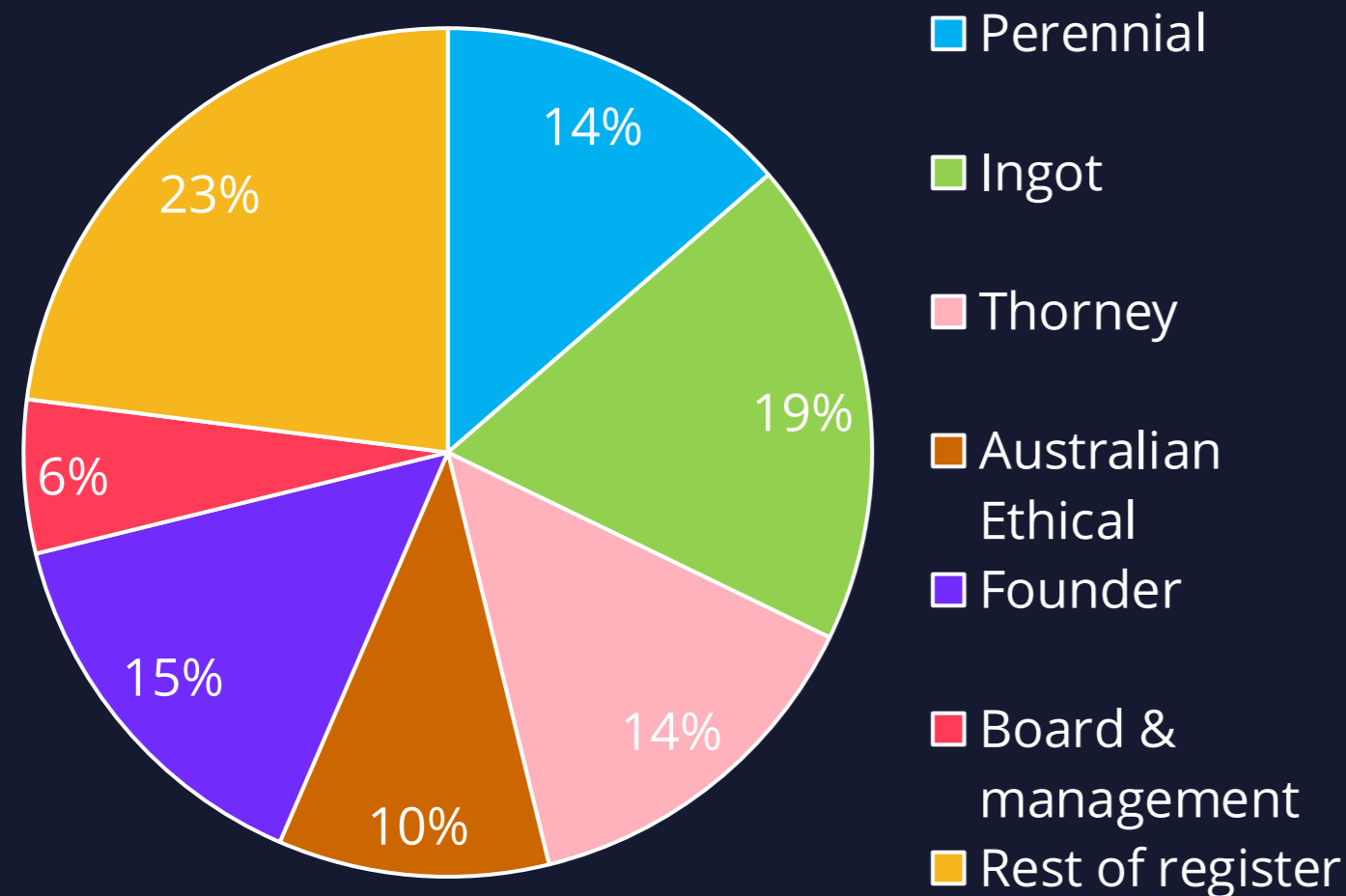
Options on issue

2 million

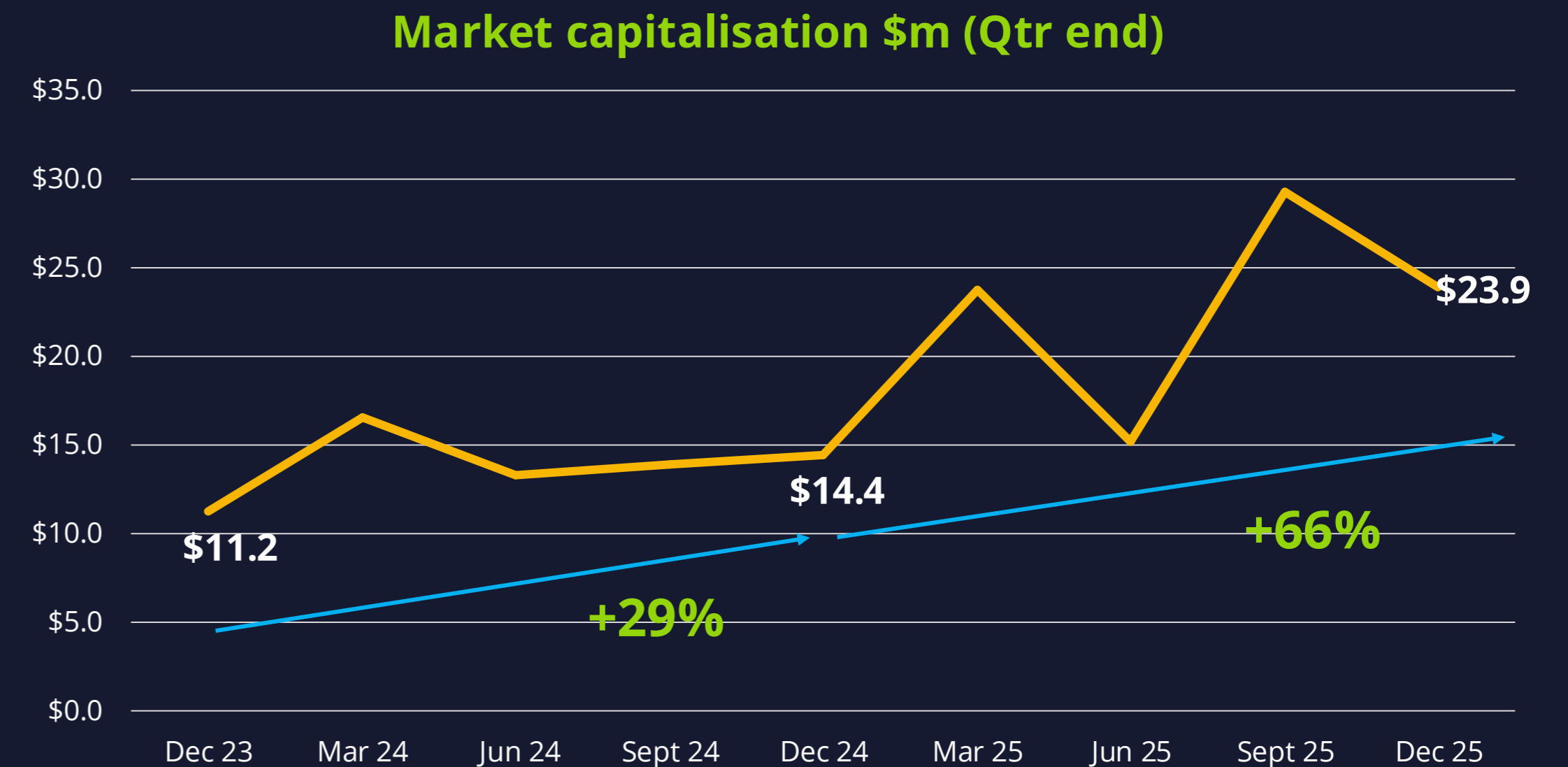
Undiluted Market Capitalisation - VWAP

\$23.9 million

Shareholder Composition



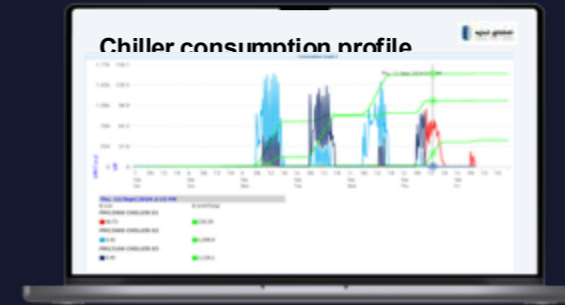
Market Cap increased by 66% since Dec 24



Product Offering



EPX provides products to support property owners and managers on their building performance and sustainability journey with a clear focus in assisting customers improve the value of their assets – **Any property type in any country** (Refer Appendix 3 for Product Value)



**Globally distributed
Cloud-based Platform
Highly available, secure & scalable**



ESSENTIAL

EDGE Essential is our self-serve option to meet your energy management & reporting needs.

INDUSTRIAL

EDGE Industrial includes real time visibility across all connected assets, providing actionable intelligence to meet Compliance needs and provide remote control capability

CERTIFI

From ratings to roadmaps, EDGE Certifi provides sustainability consultancy, NABERS assessment, star tracking solutions, energy audits and roadmaps for property owners.

- Access in-house sustainability experts with specialist skills
- Build your net zero roadmap
- Achieve industry leading sustainability ratings
- Optimise financial returns

COMMERICAL

EDGE Commercial powers tenant and cost-centre invoicing for energy usage across retail, hospitality & industrial. Report and charge based on actual usage.

- Operates in the most complex time schedules and fee structures
- Breaks down usage by energy source
- Robust, automated reporting tools
- Powerful tariff engine with customizable inputs for emissions, energy rates and time of day

INSIGHT

EDGE Insight combines the EDGE platform with the epX Customer Delivery Team and a dedicated engineer to identify and action energy efficiency measures (EEMs).

INSIGHT+

EDGE Insight+ is an extension of Insight by including a minimum savings guarantee for both energy and cost.

FY26 H1 FINANCIAL HIGHLIGHTS



AT A GLANCE

↑ **\$7.7m**

Statutory Recurring Revenue

Up 10% pcp

↑ **\$16.8m**

Annual Recurring Revenue¹

Up 20% on pcp

↑ **\$18.8m**

Annual Contracted Value²

Up 12.4% on pcp

↑ **(\$0.4m)**

FY26 H1 Underlying EBITDA

investing for growth – behind breakeven pcp

-\$1.2m

FY26 H1 Cash flow from Operations

Impacted by timing of receipts.
Tight spend control

~~\$3.0m~~
\$2.9m

Cash on hand - 31 December 2025

1. ARR is the contracted recurring revenue component of subscriptions on an annualised basis.

2. ACV is defined as the annualized revenue and fee potential under all contracts on hand at each period end. ACV includes potential annual revenue from both installed and billable contracts (ARR) and recently won contracts yet to be installed and billed. ACV is calculated into Australian dollars based on historical long term exchange rates. On conversion to actual cashflow and/or ARR, the exchange rate prevailing at the time of billing may be higher or lower to the historical long term average exchange rates used to determine the ACV value and the recurring revenue amount may also vary. ACV is an indication of potential future revenue and is predictive in character, may be affected by inaccurate assumptions or by known or unknown risks and uncertainties and may differ materially from results ultimately achieved through ARR.

FY26 H1 – Review Summary



CUSTOMER ENGAGEMENT

- New Go To Market Strategy - Increased brand visibility at major industry events in UK, ME and AU
- Rebranded the company to "epx"
- Restructured the sales function to focus on EMEA and APAC and appointed new Chief Sales Officer for EMEA (London based)



GROWTH

- New major Revenue wins:
 - GWR (UK) Tender win – existing customer renewal and uplift ACV
 - Pure Health (UAE) - Tender win with a major multi-location 10 hospital contract
- Continue to work with our existing customers and grow with them, focusing on multi-asset portfolio customers
- Continue site expansion, with over 750 sites, up from 570 sites (Dec 24) - circa increase of 30%



ACQUISITIONS

- Wattwatchers Pty Limited acquired 18 December 2025¹
- Acquisition cost consideration A\$1.0m – ACV included in H1 FY25 is \$0.3million - with a target revenue range of for FY26 of \$2-\$3m (run rate revenue) – (FY25 Total Revenue of Wattwatchers was \$5.3m)
- M&A continues to be a core plank of EPX growth strategy



OPERATIONAL METRICS - FY26 H1

- Statutory Recurring Revenue up 10%,
- Recurring Revenue per FTE increasing from \$198k to \$220k per site
- Salary Costs to Revenue ratio maintained at approx. 64% of Revenue
- Focus now on consistent Operating profitability

1. ASX announcements on 9 December 2025 and 18 December 2025.

FY26 H1 FINANCIAL RESULTS

REVENUE AND EBITDA



CONTINUED REVENUE GROWTH WITH CONTROLLED GROWTH SPEND

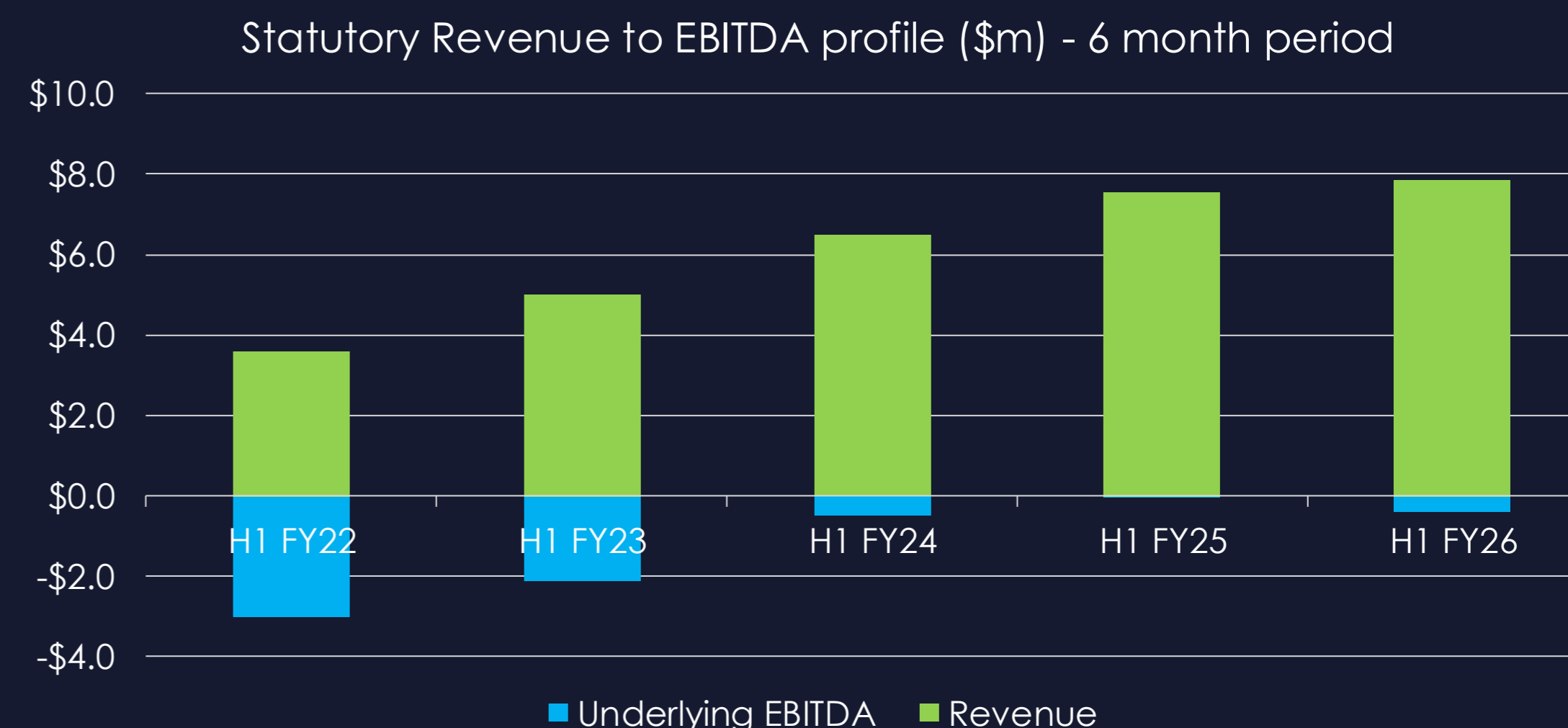
Recurring revenue up 10%

- Recurring revenue up \$0.7m in the period and stronger pipeline.
- Revenue is growing and expected to accelerate due to investment in product, marketing and sales.
- EDGE Industrial expansion and new Wattwatchers acquisition to add to growth

Underlying EBITDA loss of \$0.4m

- Underlying EBITDA loss. Targeted spend and focus on key markets in UK and Australia.
- Over last 2 years strategic spend has held EBITDA loss in a tight range while statutory revenue has increased 22%.

\$'000	6 months to		Change
	Dec-25	Dec-24	
Recurring revenue	7,650	6,953	10%
Revenue	7,863	7,539	4%
EBITDA	(794)	(133)	
Less: recovery of previously provided for debtors	(150)	(83)	
Add: Option and performance rights costs	198	5	
Add: Acquisition & restructuring costs	365	191	
Underlying EBITDA	(381)	(20)	



REVENUE



H1 FY26 RECURRING REVENUE

Total recurring revenue is up 10% in 6 month to Dec 2025 and up 28% over the last 2 years

- Total recurring revenue of \$7.7m is a 10% increase from the prior period.
- Recurring subscription revenue now consistently over 90% of total revenue.
- Recurring revenue growth since 2021 (IPO) is 140% / **CAGR 25%**

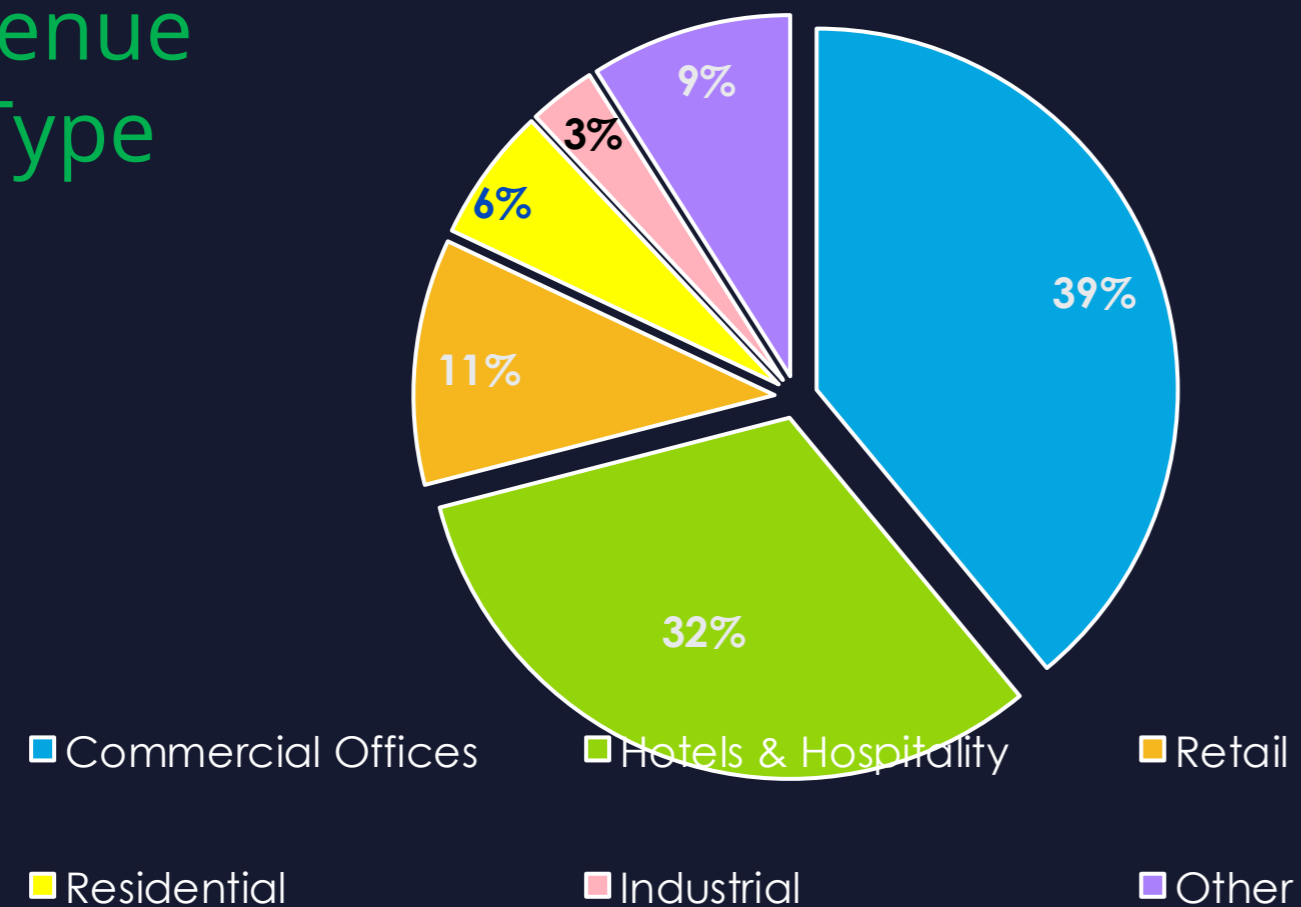
Project revenue down on prior period

- Project revenue is non-recurring and relates predominantly to meter installations not connected to the ongoing service

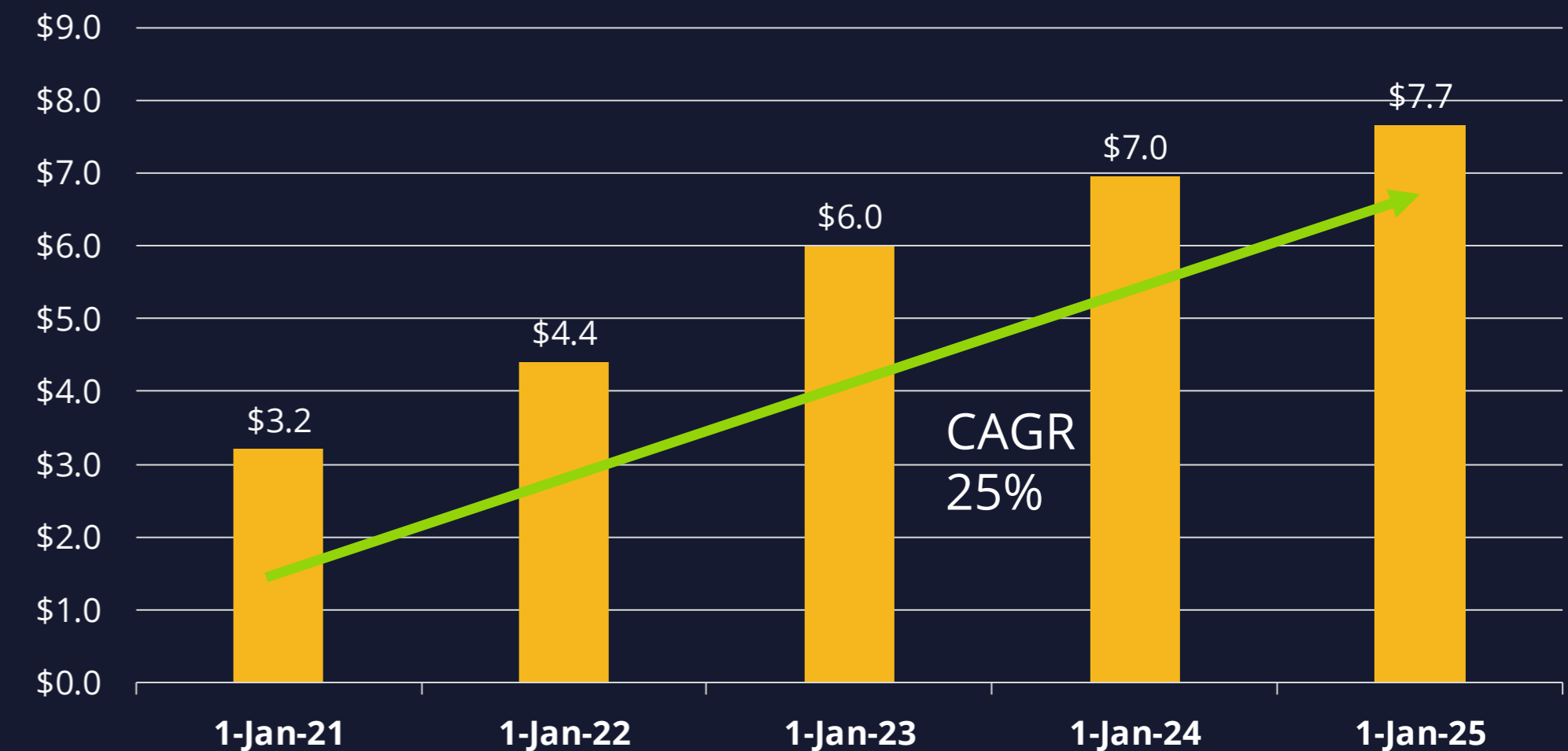
	6 months to		
\$'000	Dec-25	Dec-24	Change
Recurring revenue	7,650	6,953	10%
Projects revenue	213	112	90%
Other revenue (UAE court case recovery)		471	
Total Revenue	7,863	7,536	4%
Recurring subscription revenue %	97%	99%	

Revenue by Type

Vertical/market split



Recurring revenue (\$m) - 6 months to



EXPENDITURE



H1 FY26 UNDERLYING NET EXPENSES UP 7% AS RECURRING REVENUE GREW 10% pcp

Net operating expenses \$7.7m (pcp: \$7.2m)

- FTEs of 76, being 71 FTE consistent to pcp and 5 new FTE on the acquisition of Wattwatchers Pty Limited
- Base salaries of \$5.0m is a 5% increase on pcp
- Other employee costs to note:
 - Commissions and STI (+\$0.3m) and share based payments (+\$0.2m) increase to drive continued performance
 - Executive team STI of (\$0.3m) is in line with prior year (determined in H2 FY25)
 - Continual process improvement has allowed FTE reductions in some areas and investment in sales, marketing and product.
- Other Expenses are down 5%:
 - Lower rent in UK, closure of Sydney warehouse and relocation to Dubai.
 - Lower insurance and general spend
 - Depreciation and amortisation is up (\$0.2m) . This is a function of the growing revenue generating asset base, being the installed hardware on customer sites.

\$'000	6 Months to		Change
	Dec-25	Dec-24	
Salary & wages	5,015	4,757	5%
Sales commission, incentives	421	125	237%
Share based and other	865	583	48%
Employee benefits	6,301	5,465	15%
Other	2,261	2,374	
Total Operating Expenses	8,562	7,839	
Acquisition / restructuring	(365)	(191)	
Share based payments	(198)	(5)	
Other income / cost recovery	(273)	(398)	
Underlying Operating Expenses	7,726	7,245	7%

CASH FLOW



IMPACTED BY TIMING COLLECTION OF RECEIPTS

Operating cash inflow behind expectations

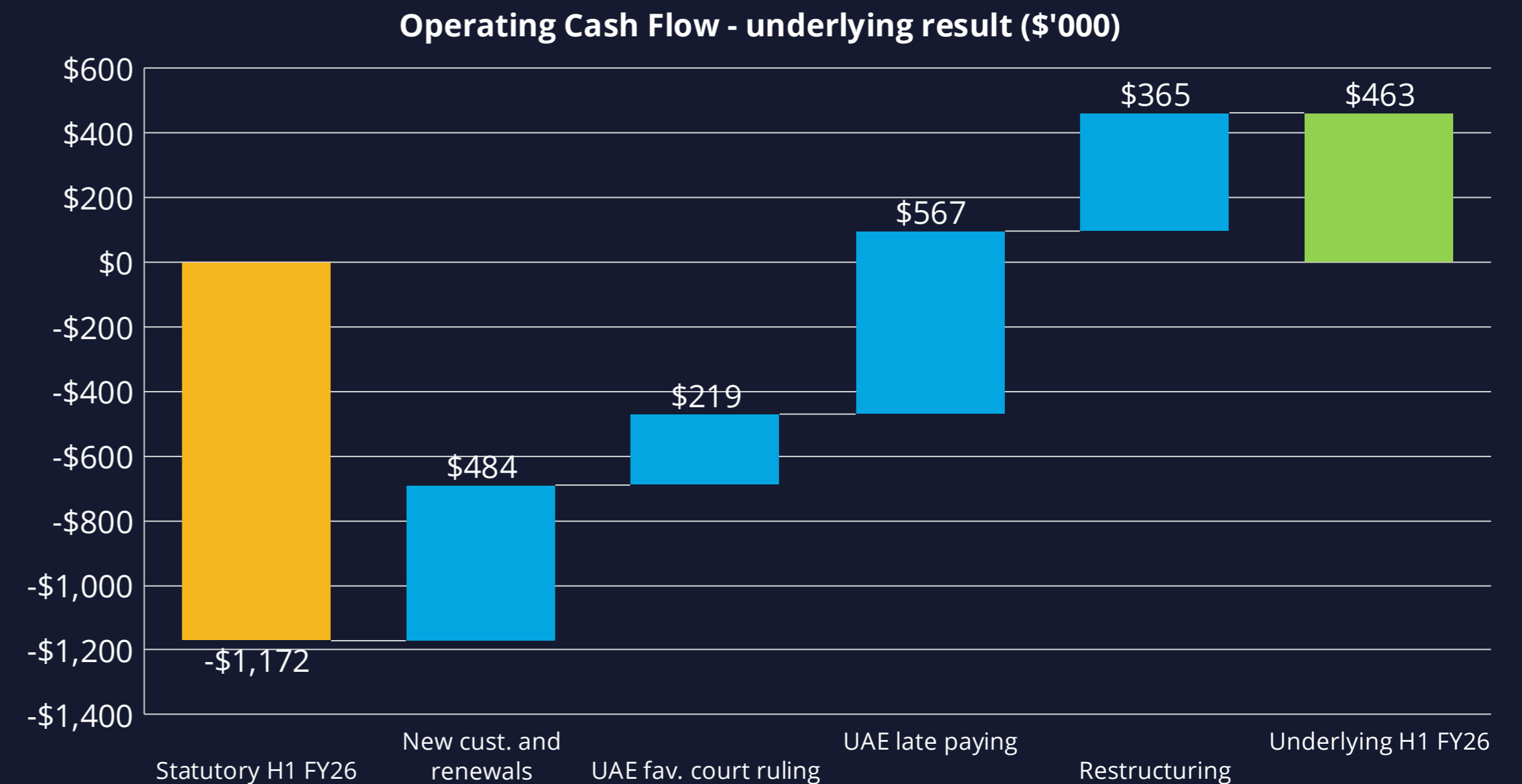
- **\$0.7m in delayed receipts anticipated by 30 June 2026**
 - New contract with major global FM in UK (\$0.3m)
 - Customer renewals subject to catchup billing (\$0.2m)
 - Favourable UAE court judgement (\$0.2m)
- **Two UAE customers withheld payment leading up to December 2025. Not in dispute (\$0.6m)**
- **“Pre Revenue” Costs associated with exiting staff and legal fees to acquire Wattwatchers (\$0.4m)**

Other cash flow items

- EPX raised capital for:
 - Aug 25 – \$1.8m following announcement of Successful 7-year new contract for 10 new hospitals, being a new vertical; and
 - Dec 25 - \$2.2m for the Acquisition of Wattwatchers Pty Limited.

6 months to

\$'000	Dec-25	Dec-24	Change
Receipts from customers	9,185	9,381	-2%
Payments to suppliers	(10,414)	(8,631)	21%
Other	57	116	-51%
Net cash inflow from operating	(1,172)	866	-235%
Cash flow from investing	(850)	(823)	3%
Net cash flow from financing	3,718	557	568%
Change in cash in period	1,696	600	183%
Cash	2,953	1,996	48%



EFFICIENCY METRICS BEING MAINTAINED

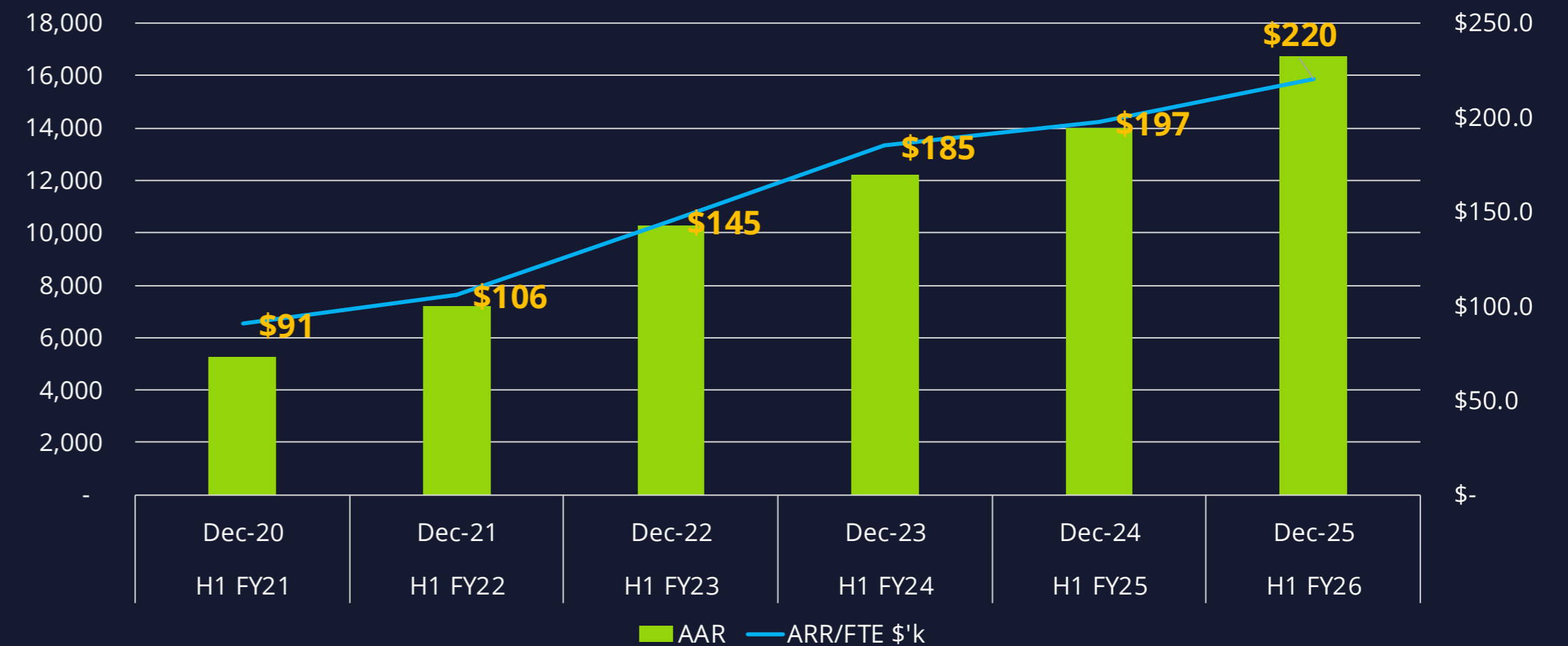


SALES SUCCESS AND OPERATIONAL EFFICIENCY

Sales efficiency

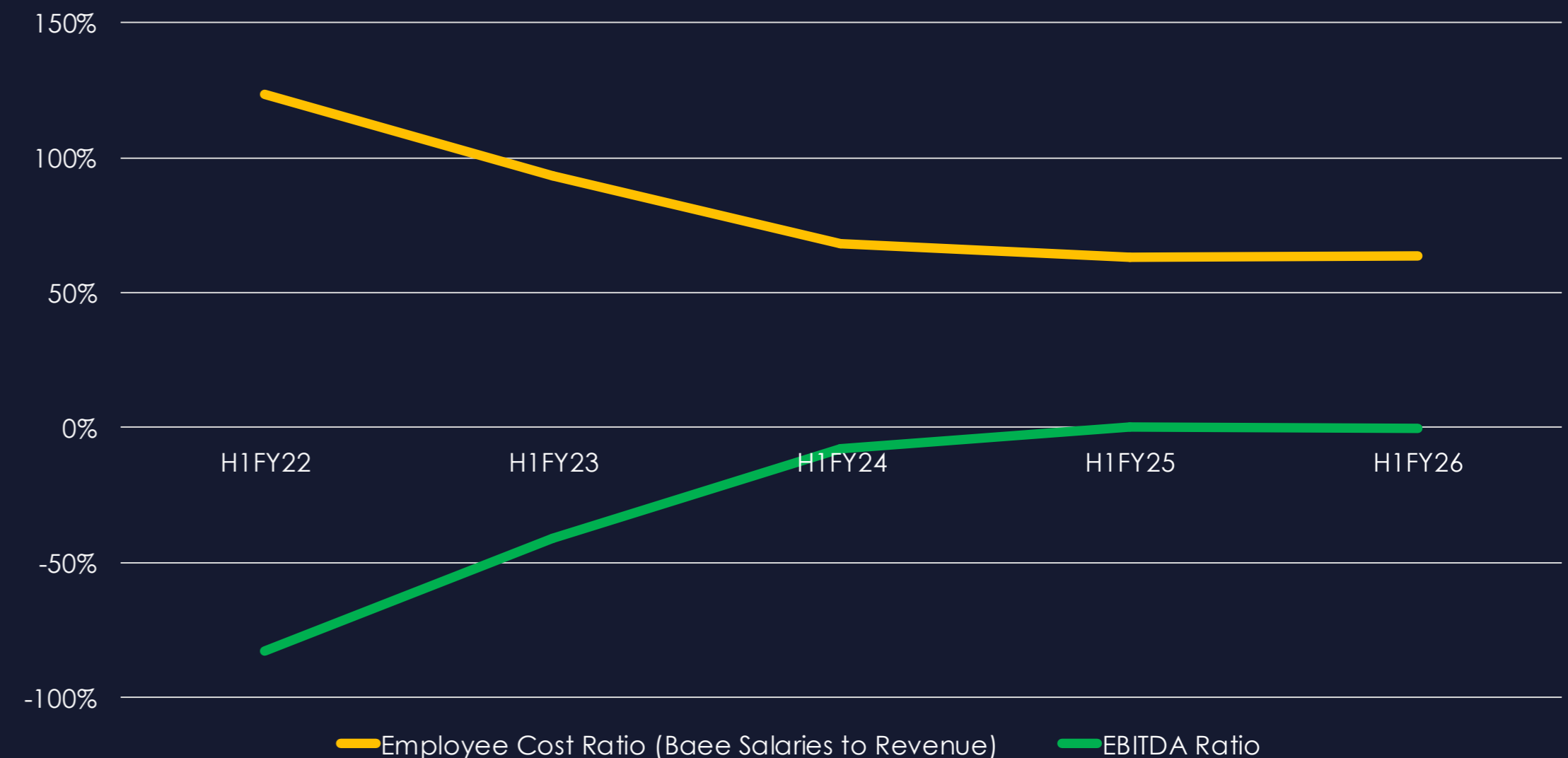
- Sales efficiency continues with ARR being added whilst managing FTE resources
- ARR per FTE increased from approx. \$197k/fte (Dec 24) to \$220k/fte (Dec 25) an increase of 11%
- FTE numbers are being retained around 71FTE on an ongoing business basis, with 5 additional FTE being added with the Acquisition of Wattwatchers Pty Limited (Total 76 FTE)

ARR/FTE (A\$/'000)



Operational Productivity

- Salary to revenue continues at approx. 64%. Salary excludes STI, government pension costs and share based payment.
- Investment has been made in new sales and marketing structure with the appointments principally in the EU/UK market segment
- EBITDA Margin impacted in H1 FY26 with the additional investment, however, is trending in a positive direction



Outlook

OUTLOOK IS POSITIVE



MACRO ENVIRONMENT STRONGLY SUPPORTS EPX CAPABILITY

- High energy costs will persist – regardless of the current issues in the Middle East
- Mandatory sustainability reporting continues to be rolled out by governments in the markets EPX operate

EPX DELIVERS IMPACT

- A data as a service platform monitoring over 5 billion+ data points per annum
- Continuing to deliver savings equating to over 270,000 tCO₂e (or equivalent of 12 million trees^{1,2})
- Globally monitoring over 8m SQM of space, with over 5m SQM specifically savings driven monitoring

GLOBAL BLUE-CHIP CLIENTS

- 750+ sites in over 25 countries
- Continued build out of existing customer base - >4yrs average customer tenure
- Multi Asset class officering across Office, Hospitality, Retail and Industrial buildings
- Multi portfolio customers wanting accurate and actionable data and assistance to deliver improvements

REVENUE GROWTH CONTINUES

- EMEA and APAC focus with a good pipeline of opportunities
- New Tender Wins in H1 FY26, in UK/EU and UAE, being a strong signal EPX can compete globally
- Continue working with existing customers in our core strength verticals
- Integrated Wattwatchers opportunities in Australia emerging, with a target from Wattwatchers of \$2-3m in revenue on a run rate basis

CONTINUE OPERATING DISCIPLINE WHILST GROWING

- Focus on Operating cash flow positivity for 2026
- Continue to maintain efficiency metrics
- EPX to remain acquisitive with M&A opportunities continuing to be presented across all markets

1. As at 31 December 2025, based on EDGE Insight/Insight+ data analytics savings that have been actioned and closed with the customers. A\$ savings achieved is based on various exchange rates as at the date of the saving being actioned and closed, and the actual value may be higher or lower based on the exchange rate at the time of measurement.

2. Calculated based on an approx. 22 kilograms of CO₂ per year being absorbed by a mature tree.

SUMMARY



- ✓ **Market tailwinds support EPX's core strength** – proven energy savings and CO2e reduction based on operational data analytics and implementation capability – EPX gives deeper insights and verifiable data to drive and implement operational improvements, efficiencies and control of assets.
- ✓ **Continue to grow with our clients** – EPX's clients include **leading blue-chip companies and global real estate brands** – we will go with them and continue to evolve our product suite to meet their building performance and sustainability needs.
- ✓ **Sales channels** – good pipeline due to improved sales structure (EMEA and APAC) and growing market awareness of EPX's proven results and ROI to the client
- ✓ **Operating performance metrics continue to strengthen** - Strong recurring revenues – **Over 90% recurring** – average Customer relationship tenure >4 years

H1 FY26
ARR
20% increase
To \$16.8m

H1 FY26
Recurring revenue
growth 10%
To \$7.7m

H1 FY26
ACV
12.4% increase
To \$18.8m

Appendices

APPENDIX 1 - AWARDS AND CERTIFICATIONS



AWARDS

edie Award 2025 (WINNER)

- **Award Focus:** Celebrates bold climate leadership, green innovation, and impactful sustainability partnerships
- **Result:** **Winner for Partnership and Collaboration of the Year** through our partnership with Westfield, Schneider Electric and ISS



CIBSE Building Performance Award (Shortlisted)

- **Award Focus:** Excellence in sustainability, innovation, and performance in the built environment
- **Result:** **Shortlisted for 2 Awards:**
 - **Building Performance Evaluation – Practice Award** and
 - **Collaboration Award for 2 Redman Place**



UK PropTech Award 2025 (Shortlisted)

- **Award Focus:** Innovation in digital transformation, sustainability, and customer-centric solutions across property
- **Result:** **Shortlisted for 2 Awards:**
 - **Collaborative Business Transformation Award - epx + Freesi**
 - **ESG Collaboration Award – epx and 2 Redman Place.**



GLOBAL CERTIFICATIONS

Globally Accredited Standards

- ISO 9001:2015 (UK and Australia)
- ISO 14001 (UK and Australia)
- ISO 45001:2018 (UK)
- ESCO and BEMAS Accreditation (UAE)



APPENDIX 2 - Product Value



Globally distributed
Cloud-based Data Platform
Highly available, secure & scalable

Building Data Visibility, Control, Compliance and Energy Optimisation

Green Ratings Assessment & Improvement Strategies

Energy Apportionment & Tenant Billing

ESSENTIAL

Data driven energy & water management

- Save money – Reduce wastage with automated alerts
- Stay compliant – Easy reporting for ESG requirements
- Low cost, secure, self serve data platform

INSIGHT / +

Active energy & water optimisation program

- Dedicated technical team of Engineers & Analysts
- Identify Energy Efficiency Measures & work with site teams to close items – savings up to 21% on average
- Guaranteed savings

INDUSTRIAL

Control and Compliance

- Real-time visibility across all connected building assets
- Actionable intelligence to optimize non-BMS assets
- Audit Ready Compliance and operational data
- Remote Control to manage, lighting, HVAC and more..

CERTIFI

Improve & maintain sustainability ratings

- Sustainability advice including;
- NABERS assessment
- Star tracking service
- Energy audits & roadmaps

COMMERICAL

Tenant energy apportionment & invoicing

- Automated tariff engine
- Customizable inputs for emissions & rates
- Automated invoice generator

APPENDIX 3 - Case study

Commercial office portfolio (Global)



About Client

42 air-conditioned commercial offices across Europe, Australia and the Middle East covering over 900,000m2 in net lettable floor area. This project comprised office buildings ranging in size from 2,000 to 160,000m2.

Building Type

Commercial office

Building Area

900,000m2

EDGE Product

Insight+

Client Needs

- Implementation of an automatic Ambient Chilled Water Lockout strategy to optimise free-cooling and allow more efficient control of the chillers, particularly in cooler seasons
- Identification of faulty BMS controllers and software programming causing excessive HVAC usage due to simultaneous heating and cooling of unoccupied spaces
- Identification of fan-coil units incorrectly running in heating mode during the cooling season
- Optimisation of lighting sensor settings
- Data-driven optimisation of HVAC set- points using BMS Analytics module, in turn, minimising heating and cooling clashes between AHUs and FCUs
- Elimination of out-of-hours HVAC and lighting loads

Our Solution

In all cases, the achieved savings have been greater than the fee to deploy EDGE Insight:

- Average annual fee = \$1.59 per m2
- Average annualised saving = \$4.68 per m2



22%

Energy reduction



\$4.7M

Annual savings



5,950t

CO2 emissions avoided annually

APPENDIX 4 - Case study

UK Rail Operator



About Client

Great Western Railways operates the Greater Western passenger railway franchise in the UK. It manages 196 stations, and its trains call at over 270. GWR operates long-distance inter-city services along the Great Western Main Line to and from the West of England and South Wales and inter-city services from London to the West Country via the Reading-Taunton line.

Building Type

Rail Stations and platforms

Sites

200+ sites

EDGE Product

Industrial

Client Needs

- Greater Western Railways had insufficient accessible sources of reliable asset telemetry, energy consumption and environmental data to proactively manage their assets.
- They were also experiencing rising energy costs & demand, unpredictable demand and wanting to achieve significant energy and carbon emission reduction targets.

Our Solution

EPX provided an Industrial Energy Management System, powered by both cloud and edge-based technologies. Utilising open communication protocols, EDGE Industrial technology is vendor agnostic & supports legacy and latest third-party asset integration. Edge intelligence enables dynamic control strategies & advanced alerting services to be cost effectively retrofitted.

EDGE Industrial's cloud platform provides a real time digital representation of the built environment with its alerts centre, analytic dashboards, interactive site views, schematics, and asset visualisations



51%

Extended asset life spans



£0.5M

Annual savings



1200+

Sites visits saved annually



The planet's most impactful building performance platform provider

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