

Advanced Engineered Materials to present at ASX SMIDcaps Conference

Advanced Engineered Materials Limited (ASX: AEM) advises that it will present today at the ASX SMIDcaps Conference in Sydney.

Executive Chairman Richard Seville will present at **10.45am AEST**, covering the Company's ultra-high purity alumina (SupALOX) products and their application in semiconductor and AI infrastructure supply chains.

A copy of the investor presentation accompanies this announcement.

Conference details

- Date: Wednesday, 23 September 2026, 8.45am – 5.00pm AEST
- Venue: Library Auditorium, State Library of NSW, 1 Shakespeare Place, Sydney NSW (hybrid — in person and via webinar)

A recording of the presentation will be made available on AEM's YouTube channel following the event: <https://www.youtube.com/@AdvancedEngineeredMaterials>

Shareholders and investors attending in person are welcome to meet Richard Seville and Emmanuel Duvnjak (Head of Communications and Investor Relations at the Company's booth throughout the day.

This announcement was authorised for release by Richard Seville, Executive Chairman and Mick Adams CEO & Managing Director.

Investor & media enquiries

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<https://www.linkedin.com/company/advanced-engineered-materials/>

<https://www.youtube.com/@AdvancedEngineeredMaterials>

<https://aemhpa.com/presentations>

About Advanced Engineered Materials (AEM)

Advanced Engineered Materials Limited (ASX: AEM) is a producer of high purity alumina (HPA) with production facilities in Cap-Chat, Quebec, Canada. Following completion of a two-year capital works program, the Cap-Chat Plant is now commercially sized with a 2,000 tpa nameplate production capacity and moving to increase capacity to 3,000 tpa in 2026 (thereby completing the Stage 1 Expansion Project), with further expansion through to 6,000 tpa capacity from 2029 (Stage 2 Expansion Project). At 3,000 tpa full production rate, the Plant will be the 3rd largest HPA production asset outside of China.

<US\$0.05/kWh

Renewable hydroelectric power supply at <US\$0.05/kWh

~77%↓

Carbon emissions of approximately 2.8 tonnes CO₂e per tonne of HPA, ~77% lower than traditional alkoxide production methods

VERIFIED

✓ Emissions profile verified in accordance with ISO 14064 (updated 2025)

ISO

✓ Management systems certified to ISO 9001, ISO 14001 and ISO 45001



AEM expects to position within the lower half of the global HPA cost curve while delivering high purity, ex-China supply to customers seeking ESG-compliant sourcing.

→ **Watch the latest video of the AEM HPA Commercial Plant from June 2026 here**

Get in Touch

If you would like to keep in touch with regular updates from AEM please follow us on

→ **LinkedIn**

→ **YouTube**

Visit our website “Investors” page for updates including a recent interview with AEM Executive Chairman Richard Seville and CEO Mick Adams and general information on HPA:

→ **Website**

This announcement has been authorised for release by the Executive Chairman and the Managing Director and CEO of Advanced Engineered Materials Limited.

Investor and Media Enquiries

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Cautionary Statement Regarding Forward-Looking Information

This announcement contains “forward-looking information” within the meaning of Australian securities laws. Forward-looking information includes, but is not limited to, statements regarding: expected sales of approximately 40 to 60 tonnes of HPA in the second half of 2026; the anticipated ramp-up of the 2,000 tpa 4N+ circuit to full production by the end of 2027, and ramp up of the 1,000 tpa 3N5+ circuit to full production by mid-2028; the expected conversion of the customer pipeline (approximately US\$190 million of potential annual value, 6,300 tonnes at US\$30.2/kg) into sales; the expectation of concluding a further three long-term supply framework agreements within the third quarter of 2026; the finalisation of arrangements with three new distributors; and expectations regarding HPA market conditions, supply constraints and demand growth.

Forward-looking information is frequently, but not always, identified by words such as “expects”, “anticipates”, “believes”, “plans”, “estimates”, “intends”, “will”, “should” and similar expressions. Actual results, performance or achievements may vary materially from those expressed or implied by the forward-looking information. Readers are cautioned not to place undue reliance on forward-looking information, which speaks only as of the date of this announcement.

Material Factors and Assumptions

The forward-looking information in this announcement is based on a number of material factors and assumptions that AEM considers reasonable as at the date of this announcement, including assumptions that: existing qualified customers will complete tooling of new production capacity, and customers currently qualifying AEM's HPA will complete their qualification processes and move into commercial production, within the timeframes currently anticipated; outstanding and forecast orders will convert to sales at expected volumes, prices and margins; the customer pipeline will progress through the laboratory trial, industrial trial and commercial relationship phases at expected conversion rates; the Cap-Chat plant will operate at expected yields and throughput without material disruption; input, energy and labour costs and the AUD/USD exchange rate will remain within expected ranges; HPA market supply constraints and demand dynamics (including in the semiconductor and sapphire supply chains) will continue substantially as described; and AEM will have access to sufficient capital and will not be materially affected by adverse regulatory, geopolitical or trade developments.

Material Risk Factors

Actual results may differ materially from the forward-looking information as a result of material risk factors, including: delays in customer tooling, qualification or commercial adoption; failure of pipeline projects or orders to convert to sales at expected volumes, prices or timing; operational, technical or ramp-up difficulties at the Cap-Chat plant; changes in HPA supply and demand, competition and pricing; adverse movements in exchange rates or input costs; customer concentration and dependence on the semiconductor and sapphire supply chains; general economic, geopolitical, trade and regulatory conditions; and the additional risk factors described in the “Risk Factors” section of the Company's Prospectus dated 10 November 2025. This list is not exhaustive.

Financial Outlook / FOFI

Certain forward-looking information in this announcement, including the expected 2H 2026 sales range of approximately 40 to 60 tonnes and the customer pipeline's approximately US\$190 million of potential annual value, may constitute a “financial outlook” or “future-oriented financial information” (FOFI) under applicable Australian securities laws. This financial outlook has been included for the purpose of providing readers with information regarding management's current expectations and estimates relating to AEM's commercial progress and anticipated production ramp-up, and readers are cautioned that this information may not be appropriate for any other purpose. The financial outlook is based on the assumptions set out above under “Material Factors and Assumptions”, is limited to the periods for which the information can reasonably be estimated and has been prepared using accounting policies consistent with those AEM expects to use in preparing its historical financial statements for the relevant periods.

Updating Policy

Except as required by applicable securities laws and the ASX Listing Rules, AEM does not undertake, and disclaims, any obligation to update or revise any forward-looking information, financial outlook or FOFI, whether as a result of new information, future events or otherwise. AEM's policy is to update previously disclosed material forward-looking information and financial outlooks in its subsequent continuous disclosure filings where there is a material change from the previously disclosed information, by disclosing the events and circumstances that caused the change and the expected differences from the prior disclosure.