HALF-YEAR 2026 RESULTS

9 September 2026

seeing potential | delivering value

ANTIN
INFRASTRUCTURE PARTNERS

Agenda

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1 | HIGHLIGHTS & BUSINESS UPDATE

2 | FINANCIAL PERFORMANCE

3 | Q&A

HIGHLIGHTS & BUSINESS UPDATE

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Highlights

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1 **SIGNIFICANT PROGRESS ON REALISATIONS**

Two exits signed over the summer at attractive valuations

2 **SUSTAINED DEPLOYMENT ACROSS ALL THREE STRATEGIES**

Following a record level of capital invested in 2H 2025

3 **SOUND OVERALL LTM PORTFOLIO PERFORMANCE**

Around or above 15% LTM on main funds in value creation mode

4 **LAUNCH OF NEW FUNDRAISING CYCLE**

Starting with Mid Cap II

5 **RESILIENT FINANCIAL PERFORMANCE**

EBITDA margin >50%

6 **ATTRACTIVE DISTRIBUTIONS TO SHAREHOLDERS**

c.8% dividend yield(1)

Notes
(1) Dividend yield calculated as the distributions per share paid in the last twelve months divided by the share price as of 6 September 2026

Attractive realisations for fund investors and active exit pipeline

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€10.8bn total distributions to investors and co-investors from inception to 30 June 2026

+€2.1bn expected to be distributed following signed exits

	REALISED EXITS	SIGNED EXITS	ONGOING PROCESSES	POTENTIAL NEAR-TERM PROCESSES
FUND III	Almaviva santé 2021; Lyntia (1) 2022; Hesley Group 2023	Solvtrans (1); idex		Several processes in preparation
FUND IV			Several ongoing processes	Additional process in preparation
MID CAP I				First process in preparation

at or above 2.0x Gross Multiple

Notes
(1) Partial exit

Landmark European exits driving strong value realisation

SØLVTRANS	*The world's #1 provider of mission critical wellboats to the growing aquaculture industry*

Leading European independent energy infrastructure platform	idex CARING FOR ENERGIES

48 wellboats (from 21 at acquisition) and 8 more under construction

Diversification to additional fish species beyond salmon, incl. cod

Geographical expansion into Canada, Iceland, Chile and Australia

Strategic acquisition of Dess Aquaculture Shipping

c.2.4x
NOK Gross Multiple(1)
(Flagship III)

Growth of core district heating business and **enlarged product offering**

Geographic expansion incl. Belgium, Lithuania and Italy

Green energy sourcing in district heating & cooling increased from 40% → 65%

Growth since 2018:
Revenues >2x
EBITDA c.3x

c.2.0x
Gross Multiple
(Flagship III)

Notes
(1) On the c.30% realised part of the investment. Gross Multiple of 2.1x in Euro, based on currency exchange rates at date of signing

Selective capital deployment in attractive investment opportunities over last 12 months

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FLAGSHIP V (2022)	MID CAP I (2021)	NEXTGEN I (2021)
3 investments	**4 investments**	**2 investments**
38% 2Q 2025 → Fund commitment → 58% 2Q 2026	50% 2Q 2025 → Fund commitment → 80% 2Q 2026	58% 2Q 2025 → Fund commitment → 66% 2Q 2026
	MID CAP I IS NOW FULLY COMMITTED	
NorthC, Sapphire Gas Solutions, Vigor Marine Group	Aquavista, Swiftair, Emsere Fully Equipped, Belambra	Matawan mobility as one, New investment to be announced(1)

Notes
(1) NGI investment is signed but yet to be announced due to the required regulatory approvals

Focused on delivering diversification and differentiated exposure to our fund investors

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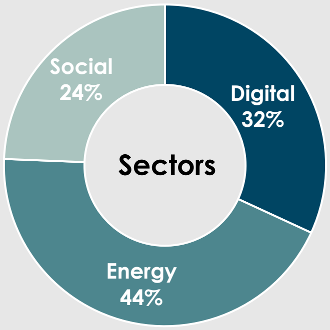
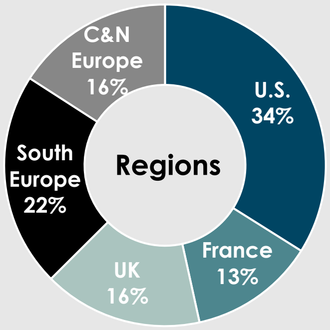
BROAD DIVERSITY OF SEGMENTS, REGIONS AND THEMES

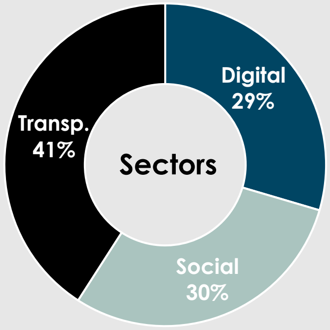
AIRCRAFT LEASING AND LOGISTICS	MARINAS	AIR TRANSPORT	MARITIME INFRASTRUCTURE	SMART MOBILITY
MEDICAL EQUIPMENT LEASING	LEISURE INFRASTRUCTURE	OFFGRID ENERGY SOLUTIONS	COLOCATION DATA CENTRES	

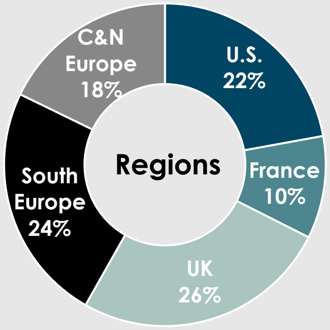
FLAGSHIP IV



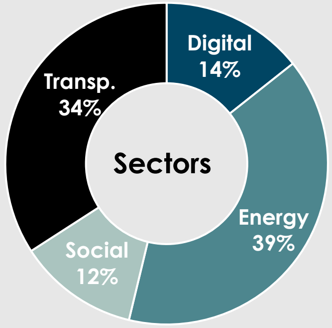


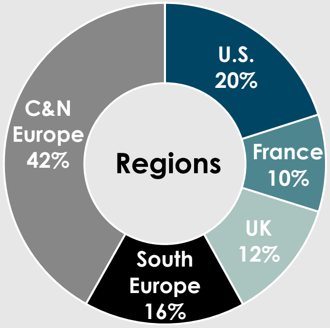
MID CAP I





FLAGSHIP V





Notes
Funds committed as of 30 June 2026. Southern Europe includes Spain, Italy and Portugal; Central & Northern (C&N) Europe includes Germany, the Netherlands, Norway and Sweden.

Sound investment performance overall, with main funds in value creation mode around or above 15% LTM

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FLAGSHIP IV
2019

€**6.5**bn
fund size

Performance LTM(1)

+14.5%

MID CAP I
2021

€**2.2**bn
fund size

Performance LTM(1)

+19.6%

FLAGSHIP V
2022

€**10.2**bn
fund size

Performance LTM(1)

+16.3%

Notes
(1) Change in value between opening and closing balances, excluding any added or realised capital during the period

Continued discipline, conviction and consistency

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Flagship I 2008	Flagship II 2013	Flagship III 2016	Flagship IV 2019	Mid Cap I 2021	NextGen I 2021	Flagship V 2022	Upcoming vintages
Fully realised	**Fully realised**	**43% realised** (63% pro-forma[1])	**4% realised**	**Fully committed**	**Deployment ongoing**	**Deployment ongoing**	Mid Cap II
2.5x	2.6x	1.7x	1.5x	1.5x	1.1x	1.3x	Flagship VI
Realised Gross Multiples		Gross Multiples as of 2Q 2026					
Inaugural funds that proved the relevance of Antin's model with outstanding returns		Resilient outcome expected despite exceptional headwinds; Acceleration of exits	Solid value creation potential, with imminent first exits	Promising portfolio with strong underlying asset quality	Innovative new strategy with strong long-term potential	Promising portfolio with strong underlying asset quality	Next Gen II

Notes
(1) Including the partial exit of Sølvtrans and the full exit of Idex signed this summer

Strong investment capabilities and enhanced global investor coverage

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254 professionals (***115** investment professionals*)

LONDON
Investment hub
72 professionals
*incl. **39** investment professionals*

NEW YORK
Investment hub
51 professionals
*incl. **34** investment professionals*

LUXEMBOURG
Fund administration
41 professionals

PARIS
Investment hub
87 professionals
*incl. **42** investment professionals*

APAC
Representation offices in Seoul and Melbourne
4 Investor Relations professionals[1]

Notes: as of 30 June 2026
(1) 3 professionals in Seoul as of 30 June 2026; 4 professionals including the addition of Duncan Welsh in Melbourne on 1 July (not included in the 254 professionals at 30 June)

FINANCIAL PERFORMANCE

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Resilient performance at the start of a new fundraising cycle

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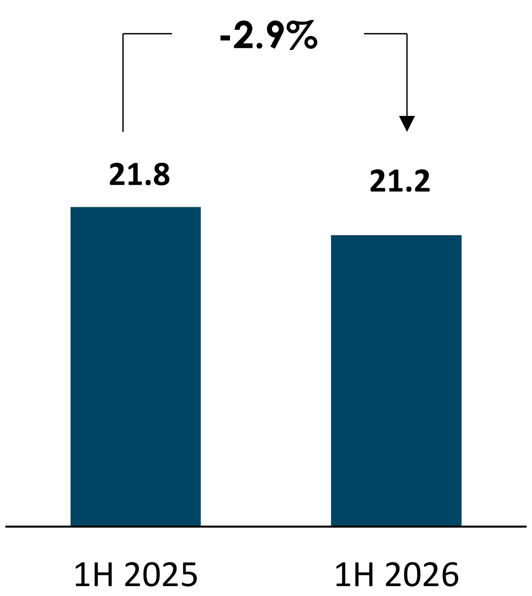
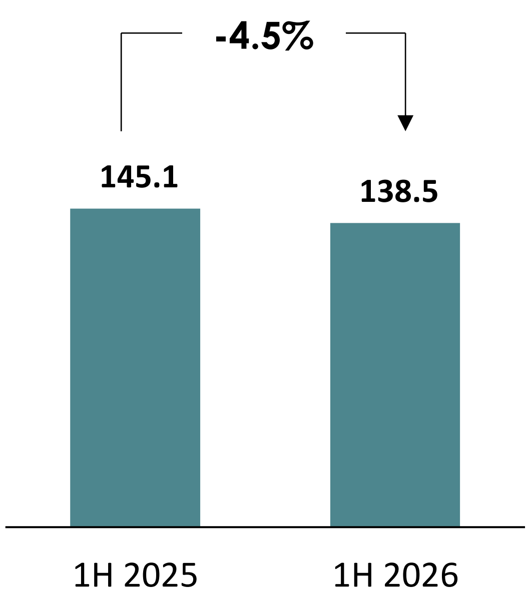
FEE-PAYING AUM
in €bn

€21.2bn
(€33.3bn total AUM)



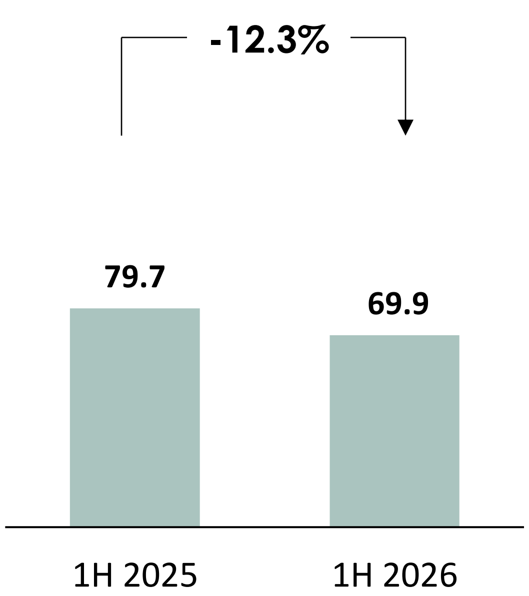
UNDERLYING REVENUE
in €m

>95%
management fees



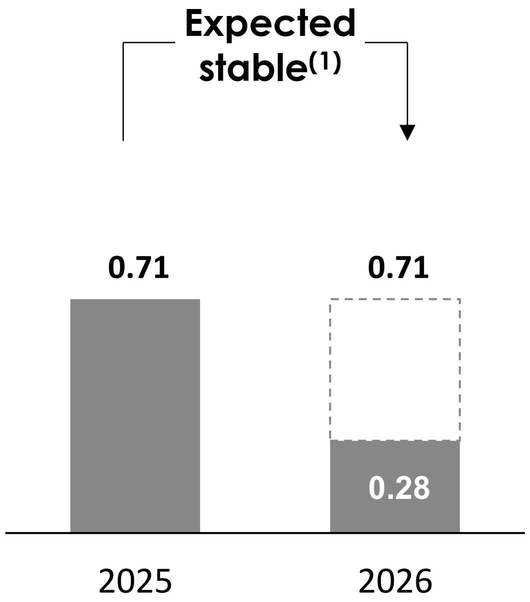
UNDERLYING EBITDA
in €m

c.50%
margin



FULL-YEAR DISTRIBUTIONS
in € per share

>100%
payout ratio



Notes: Change in accounting method regarding administrative fees at the end of 2025 and restatement of 1H 2025 underlying figures.
(1) interim dividend of €0.28 per share. Full-year distribution for 2026 expected to be stable at €0.71 per share. Subject to shareholder approval at the 2027 AGM

Revenues impacted by step-down of Mid Cap I

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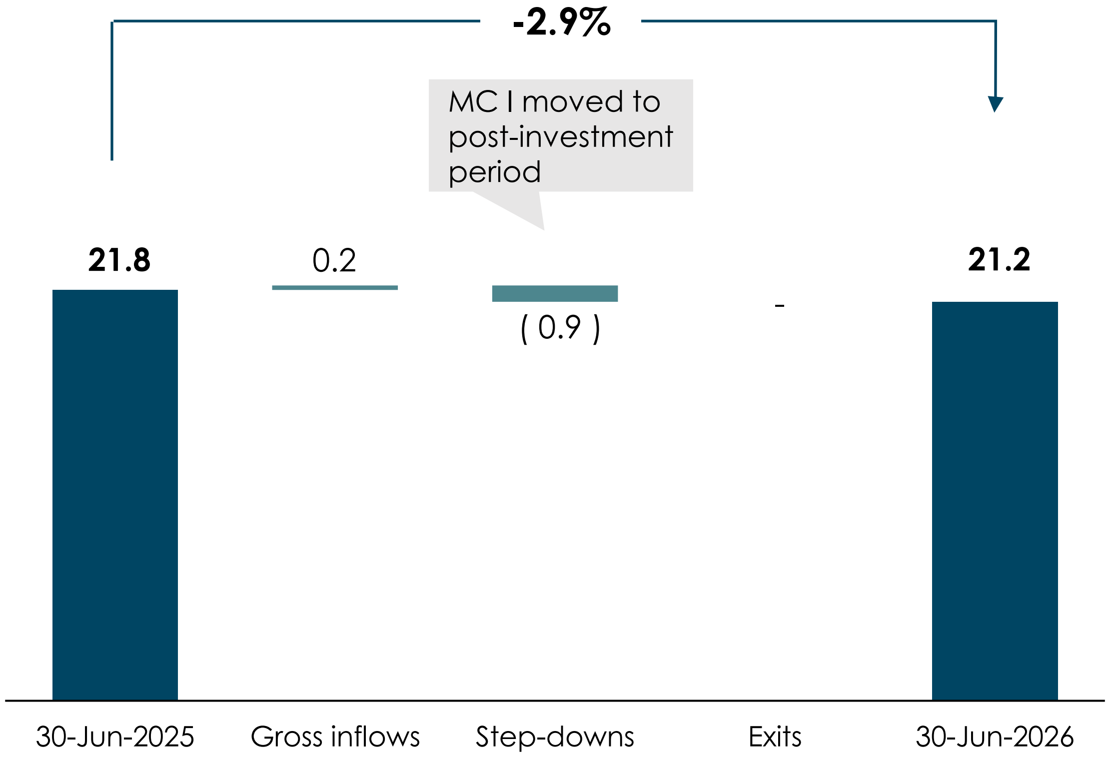
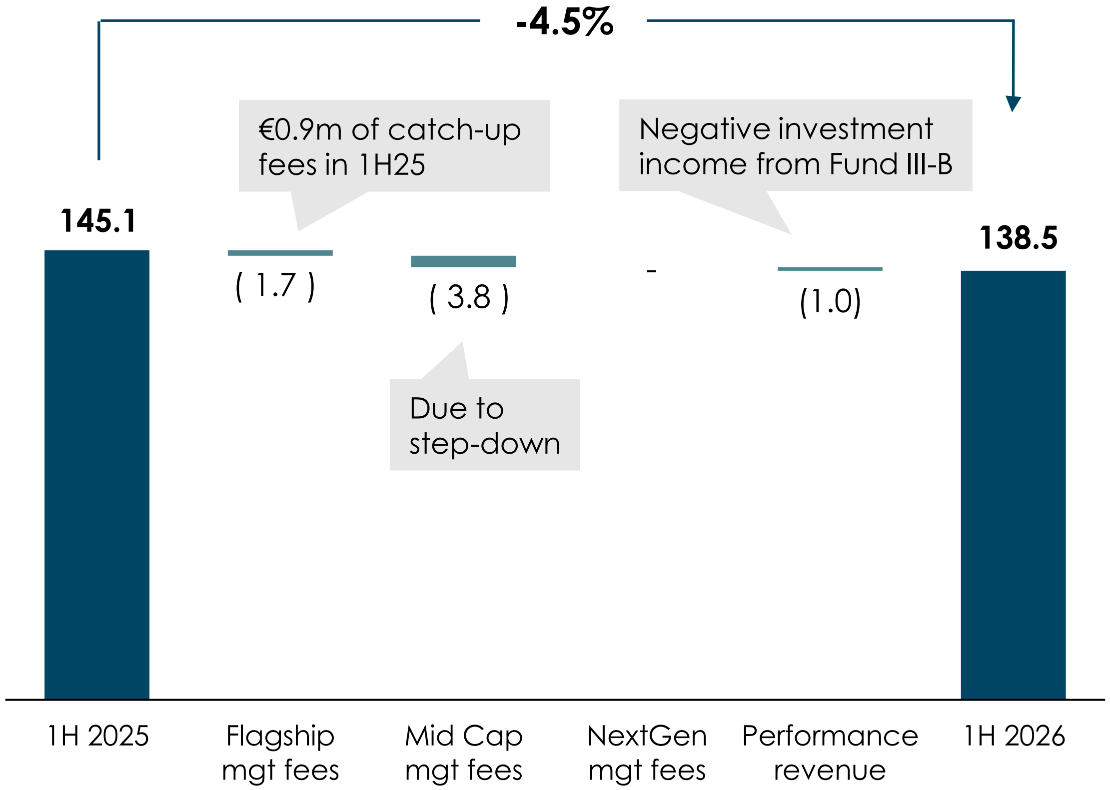
FEE-PAYING AUM (in €bn)



UNDERLYING REVENUE (in €m)



Selective investments in the platform and cost discipline

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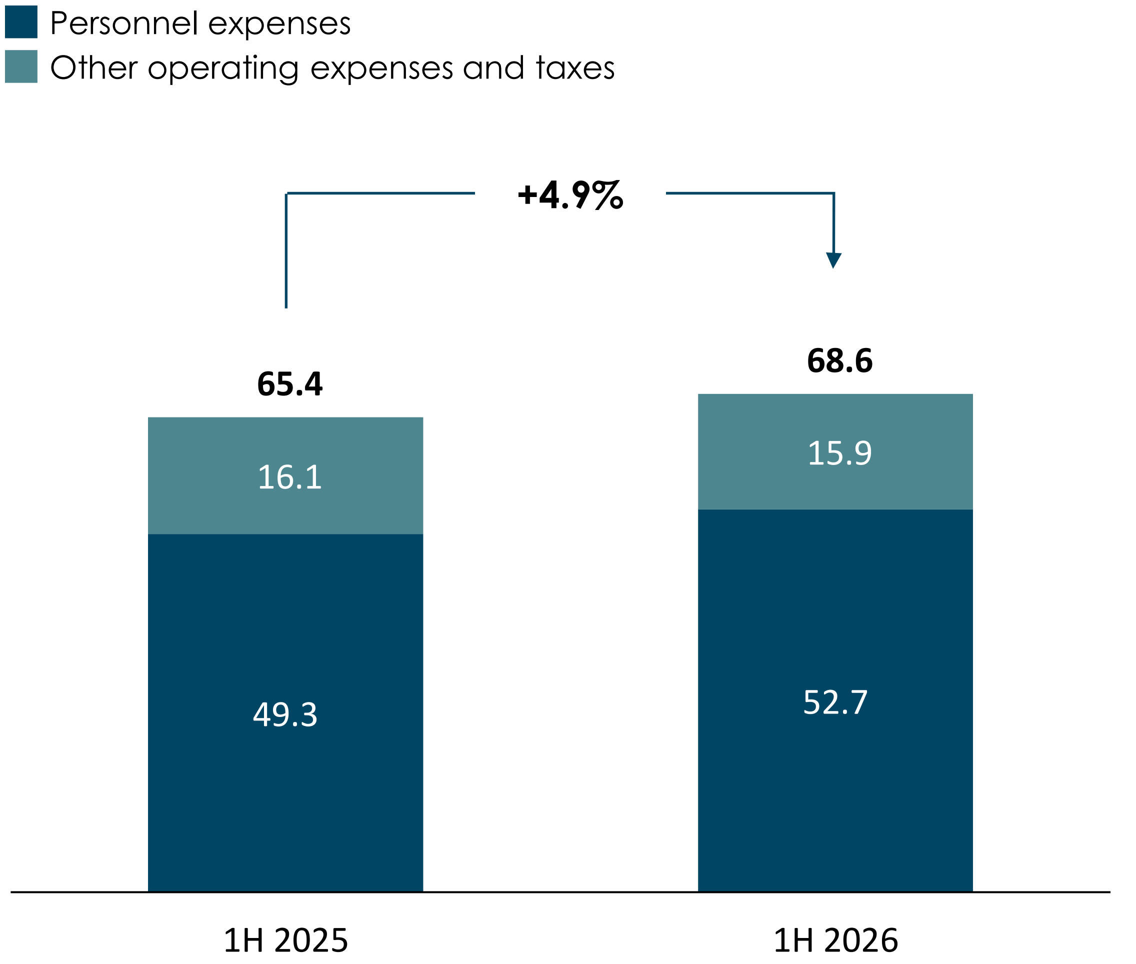
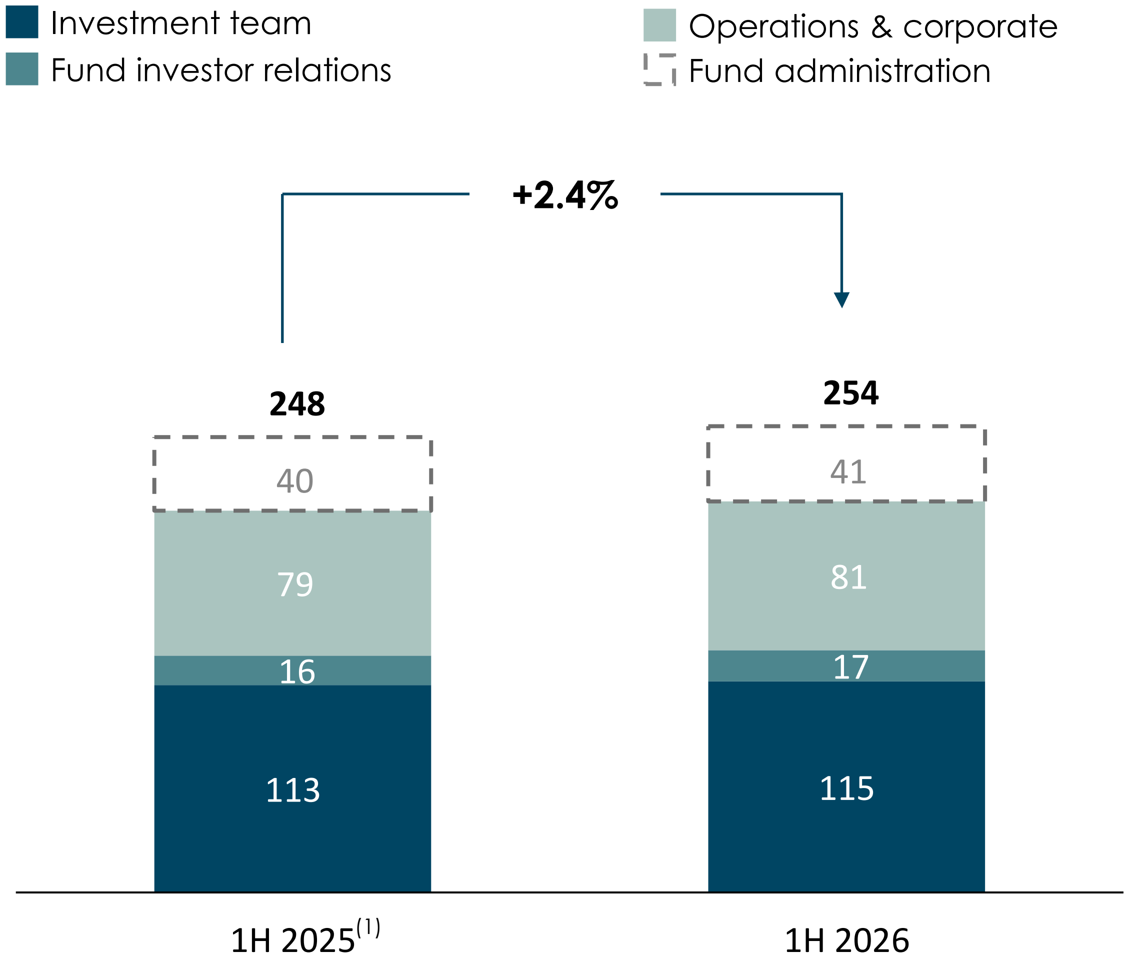
UNDERLYING OPERATING EXPENSES (€m)



HEADCOUNT (no. of employees)



Notes:
(1) Restatement of 2025 figures: legal & tax specialists working predominantly on corporate matters have been recategorized from investment specialist to corporate roles

Balance sheet-light business model and strong cash position

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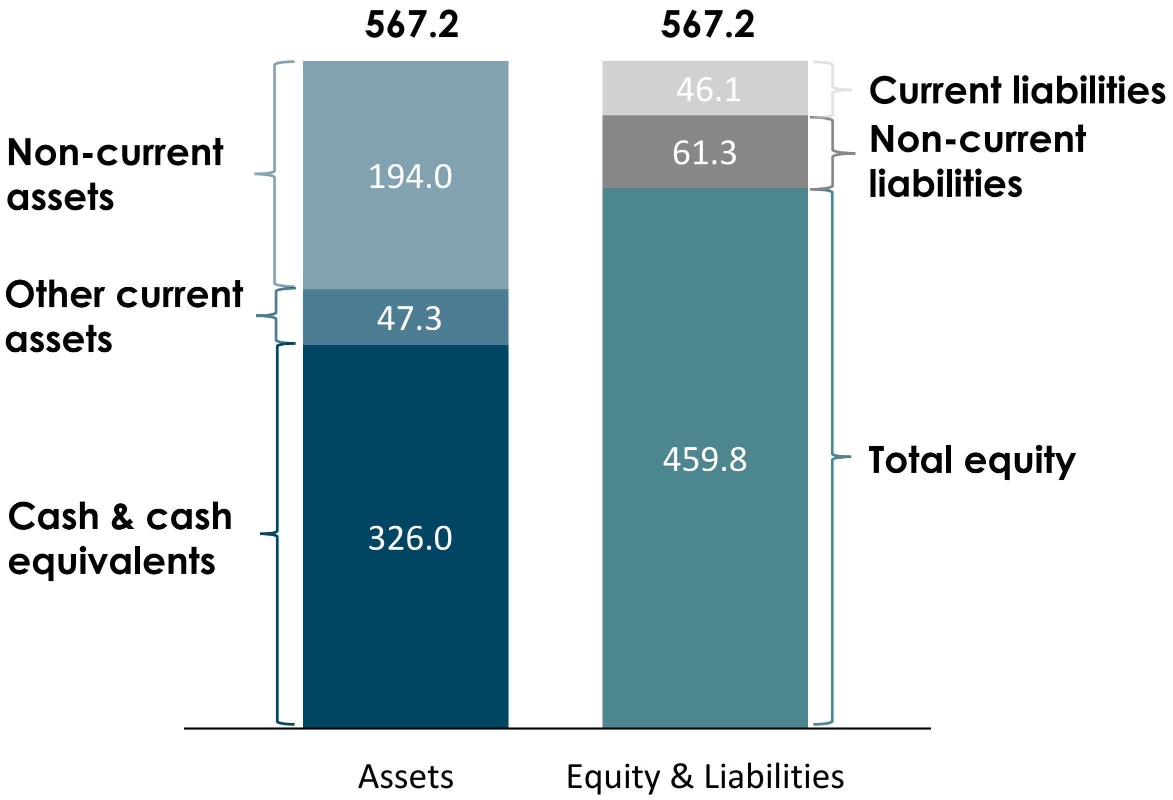
BALANCE SHEET-LIGHT (€m)



CAPITAL ALLOCATION PRORITIES

Fund investments

€95m committed capital for investment in current funds

Additional commitments to come with next fundraising cycle

Growth initiatives

Continued review of **organic** and **Inorganic** opportunities

Distributions

1st instalment of **€0.28 per share** to be paid on 22 October

FY2026 distribution expected to be stable[1] at **€0.71 per share**

Notes:
(1) Subject to shareholders' approval at the 2027 AGM

Continued partner alignment expected beyond the IPO lock-up

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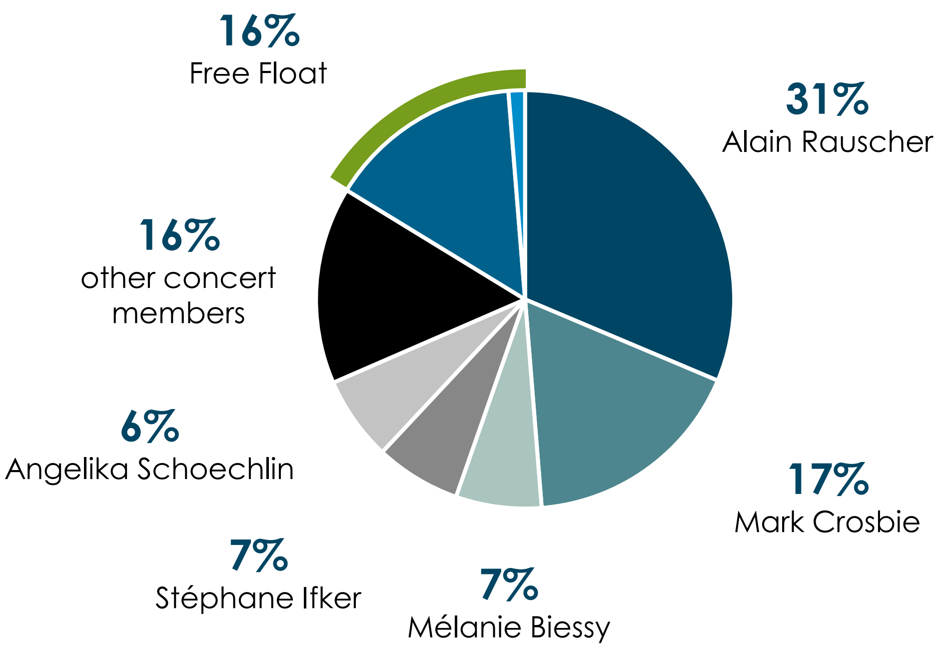
SHAREHOLDER BASE



LIQUIDITY FRAMEWORK

5-year lock-up expiry on 27 September 2026

Post lock-up expiry

- **Shareholder agreement remains in place to regulate rights and obligations**
- **Partner Shareholders to continue to act in concert**
- **Threshold in place to limit individual transactions**

Increasing free float through an orderly process that protects shareholder value

Continued partner ownership complements carried interest, which remains the key performance-linked driver of long-term alignment across stakeholders

Antin's disciplined investment approach will support its next growth phase

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A COMPLEX AND RAPIDLY EVOLVING MARKET ENVIRONMENT

*We are **adapting with discipline,** as we have done before*

INFRASTRUCTURE CONTINUES TO DEMONSTRATE ITS RESILIENCE

Rapid changes** across energy, digital, transport and social infrastructure are **creating new opportunities

WE HAVE BUILT A SCALED INFRASTRUCTURE INVESTING PLATFORM

*Its breadth allows us to remain highly selective while delivering **diversified investment opportunities** across Europe and North America*

DELIVERING STRONG INVESTMENT PERFORMANCE REMAINS OUR KEY FOCUS

*We are taking major steps to **return capital to fund investors** through attractive exits*

NEW FUNDRAISING CYCLE UNDERWAY

*Strong long-term infrastructure prospects underpinning our **next growth chapter***

Q&A

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APPENDIX

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Income statement on an underlying basis

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(€m)	1H 2026	1H 2025
Management fees	139.3	144.8
Carried interest and investment income	(0.8)	0.2
Administrative fees and other revenue net	-	-
TOTAL REVENUE	**138.5**	**145.1**
Personnel expenses	(52.7)	(49.3)
Other operating expenses	(15.9)	(16.1)
TOTAL OPERATING EXPENSES	**(68.6)**	**(65.4)**
UNDERLYING EBITDA	**69.9**	**79.7**
% margin	*50%*	*55%*
Depreciation and amortisation	(8.9)	(8.7)
UNDERLYING EBIT	**61.0**	**71.1**
Net financial income and expenses	2.7	3.4
UNDERLYING PROFIT BEFORE INCOME TAX	**63.7**	**74.5**
Income tax	(16.7)	(19.2)
% income tax	*26%*	*26%*
UNDERLYING NET INCOME	**47.0**	**55.2**
% margin	*34%*	*38%*

Breakdown of underlying revenue

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(€m)	1H 2026	1H 2025
Flagship Fund III	13.7	13.1
Fund III-B	2.8	2.7
Flagship Fund IV	30.9	32.4
Flagship Fund V	70.9	71.8
of which catch-up fees	*-*	*0.9*
Mid Cap Fund I	12.2	16.0
NextGen Fund I	8.9	8.9
TOTAL MANAGEMENT FEES	**139.3**	**144.8**
Carried interest	0.0	0.1
Investment income	(0.8)	0.2
PERFORMANCE REVENUE	**(0.8)**	**0.2**
TOTAL REVENUE	**138.5**	**145.1**

1H 2026 income statement: from underlying to IFRS

ANTIN INFRASTRUCTURE PARTNERS

(€m, 1H 2026)	**Underlying basis**	**Non-recurring items**	**IFRS basis**
Management fees	139.3	-	139.3
Carried interest and investment income	(0.8)	-	(0.8)
TOTAL REVENUE	**138.5**	**-**	**138.5**
Personnel expenses	(52.7)	-	(52.7)
Other operating expenses & tax	(15.9)	-	(15.9)
TOTAL OPERATING EXPENSES	**(68.6)**	**-**	**(68.6)**
EBITDA	**69.9**	**-**	**69.9**
Depreciation and amortisation	(8.9)	-	(8.9)
EBIT	**61.0**	**-**	**61.0**
Net financial income and expenses	2.7	(0.5)	2.2
PROFIT BEFORE INCOME TAX	**63.7**	**(0.5)**	**63.2**
Income tax	(16.7)	0.1	(16.6)
NET INCOME	**47.0**	**(0.3)**	**46.6**

1H 2025 income statement: from underlying to IFRS

(€m, 1H 2025)	**Underlying basis**	**Administrative fees**	**Non-recurring items**	**IFRS basis**
Management fees	144.8		-	144.8
Carried interest and investment income	0.2		-	0.2
Administrative fees and other revenues net	-	3.1	-	3.1
TOTAL REVENUE	**145.1**	**3.1**	**-**	**148.2**
Personnel expenses	(49.3)	-	1.1	(48.1)
Other operating expenses & tax	(16.1)	(3.1)	-	(19.2)
TOTAL OPERATING EXPENSES	**(65.4)**	**(3.1)**	**1.1**	**(67.3)**
EBITDA	**79.7**	**-**	**1.1**	**80.8**
Depreciation and amortisation	(8.7)	-	-	(8.7)
EBIT	**71.1**	**-**	**1.1**	**72.2**
Net financial income and expenses	3.4	-	(2.4)	1.0
PROFIT BEFORE INCOME TAX	**74.5**	**-**	**(1.3)**	**73.1**
Income tax	(19.2)	-	(2.0)	(21.2)
NET INCOME	**55.2**	**-**	**(3.3)**	**51.9**

Balance sheet

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(€m)	**30-Jun-2026**	**31-Dec-2025**
Property, equipment and intangible assets	25.8	28.5
Right-of-use assets	48.3	51.7
Financial assets	110.1	97.5
Derivative financial assets	1.6	0.8
Deferred tax assets and other non-current assets	8.2	8.9
TOTAL NON-CURRENT ASSETS	**194.0**	**187.4**
Cash and cash equivalents	326.0	367.9
Accrued income	17.4	14.9
Other current assets	29.9	29.7
TOTAL CURRENT ASSETS	**373.3**	**412.5**
TOTAL ASSETS	**567.2**	**599.9**
TOTAL EQUITY	**459.8**	**476.5**
Borrowings and financial liabilities	-	-
Lease liabilities	53.8	57.9
Other non-current liabilities	7.6	6.4
TOTAL NON-CURRENT LIABILITIES	**61.3**	**64.3**
Borrowings and financial liabilities	-	-
Lease liabilities	10.4	9.5
Income tax liabilities	0.0	0.0
Other current liabilities	35.6	49.6
TOTAL CURRENT LIABILITIES	**46.1**	**59.1**
TOTAL EQUITY AND LIABILITIES	**567.2**	**599.9**

Cash flow statement

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(€m)	**1H 2026**	**1H 2025**
INFLOW / (OUTFLOW) RELATED TO OPERATING ACTIVITIES	**38.2**	**48.4**
Of which (increase) / decrease in working capital requirement	(30.3)	(49.3)
INFLOW / (OUTFLOW) RELATED TO INVESTING ACTIVITIES	**(13.7)**	**(10.1)**
Of which purchase of property and equipment	(0.4)	(6.4)
Of which investment in Antin funds	(11.1)	(2.1)
Of which proceeds related to Antin funds	-	-
Of which net change in other financial assets	(2.2)	(1.6)
INFLOW / (OUTFLOW) RELATED TO FINANCING ACTIVITIES	**(67.0)**	**(65.2)**
Of which dividends paid	(62.5)	(66.1)
Of which payment of lease liabilities	(4.6)	(1.3)
Of which disposal / (repurchase) of treasury shares	(2.5)	(1.7)
Of which net financial interest received and paid	2.6	3.9
NET INCREASE / (DECREASE) IN CASH AND CASH EQUIVALENTS	**(42.5)**	**(26.9)**
Cash and cash equivalents, beginning of period	**367.9**	**388.9**
Translation differences on cash and cash equivalents	0.5	(0.5)
CASH AND CASH EQUIVALENTS AT END OF PERIOD	**326.0**	**361.5**

Carried interest revenue recognition in P&L expected in near to medium term

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SIGNIFICANT CARRIED INTEREST REVENUE POTENTIAL…

Fund	Vintage	Fund size (in €bn)	Antin allocation (in %)	Current Gross Multiple	Carried Interest at 2.0x GM (in €m)[1]
Flagship					
Fund III-B[2]	2020	1.2	20.0%	1.4x	~50
Flagship V	2022	10.2	20.0%	1.3x	~350
Mid Cap					
Mid Cap I	2021	2.2	20.0%	1.5x	~80
NextGen					
NextGen I	2021	1.2	20.0%	1.1x	~40
Total					**~€500m**

…DELIVERS UPSIDE TO P&L

Potential for

~€500m

in carried interest revenue

100% of carried interest revenue for Antin goes to profit before tax

(1) *Theoretical calculation based on the realisation of a Gross Multiple of 2.0x*
(2) *Includes small contributions on both Flagship III & Fund III-B from carried interest shares repurchased from employees who departed the firm*

Key Stats by fund (1/2)

As of 30 June 2026

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(€bn)

Fund	Vintage	Fund size	AUM	Fee-Paying AUM	% committed	% realised	Gross Multiple	Expectation[2]
Flagship								
Flagship III [1]	2016	3.6	5.0	2.4	92%	43%	1.7x	**On plan**
Flagship IV	2019	6.5	10.9	5.2	87%	4%	1.5x	**On plan**
Fund III-B	2020	1.2	1.2	0.9	92%	31%	1.4x	**Below plan**
Flagship V	2022	10.2	12.3	10.2	58%	0%	1.3x	**On plan**
Mid Cap								
Mid Cap I	2021	2.2	2.5	1.3	80%	0%	1.5x	**On plan**
NextGen								
NextGen I	2021	1.2	1.4	1.2	66%	1%	1.1x	**On plan**

(1) % realised includes the partial sale of portfolio companies from Flagship III to Fund III-B
(2) "On plan" refers to funds with an expected final Gross Multiple between 1.7x and 2.2x, at or above 2.2x funds are defined as "above plan" and below 1.7x funds are defined as "below plan"

Key Stats by fund (2/2)

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As of 30 June 2026

(€bn)				COST OF INVESTMENTS			VALUE OF INVESTMENTS		
Fund	**Vintage**	**Fund size**	**Fee-paying AUM**	**Total**	**Realised**	**Remaining**	**Total**	**Realised**	**Remaining**
Flagship									
Flagship III (1)	2016	3.6	2.4	3.0	0.7	2.4	5.6	2.2	3.4
Flagship IV	2019	6.5	5.2	5.2	-	5.2	7.8	0.3	7.5
Fund III-B	2020	1.2	0.9	1.1	0.3	0.9	1.6	0.5	1.1
Flagship V	2022	10.2	10.2	3.6	-	3.6	4.7	0.0	4.7
Mid Cap									
Mid Cap I	2021	2.2	1.3	1.2	-	1.2	1.7	0.0	1.7
NextGen									
NextGen I	2021	1.2	1.2	0.5	0.1	0.4	0.5	0.0	0.5

(1) Cost and value of investments include the partial sale of portfolio companies from Flagship III to Fund III-B

Definitions

Antin: Umbrella term for Antin Infrastructure Partners S.A.

Antin Funds: Investment vehicles managed by Antin Infrastructure Partners SAS or Antin Infrastructure Partners UK

Assets Under Management (AUM): Operational performance measure representing both the assets managed by Antin from which it is entitled to receive management fees, undrawn commitments, the assets from co-investment vehicles which do not generate management fees or carried interest, and the net value appreciation on current investments

Carried Interest: A form of investment income that Antin and other carried interest investors are contractually entitled to receive directly or indirectly from the Antin funds, which is inherently variable and fully dependent on the performance of the relevant Antin Fund(s) and its underlying investments

Catch-up fees: Fees charged to fund investors joining after the fund’s first close to ensure equal treatment among fund investors

% Committed: Measures the share of a fund’s total commitments that has been deployed. Calculated as the sum of (i) closed and/or signed investments (ii) any earn-outs and/or purchase price adjustments, (iii) funds approved by the Investment Committee for add-on transactions, (iv) less any expected syndication, as a % of a fund’s committed capital at a given time

Committed Capital: The total amounts that fund investors agree to make available to a fund during a specified time period

Fee-Paying Assets Under Management (FPAUM): The portion of AUM from which Antin is entitled to receive management fees across all of the Antin Funds at a given time

Gross Exits: Value amount of realisation of investments through a sale or write-off of an investment made by an Antin Fund. Refers to signed realisations in a given period

Gross Inflow: New commitments through fundraising activities or increased investment in funds charging fees after the investment period

Gross IRR: The total internal rate of return for the applicable Antin Fund before the deduction of any fees, expenses or carried interest

Gross Multiple: Calculated by dividing (i) the sum of (a) the total cash distributed to the Antin Fund from the portfolio company and (b) the total residual value (excluding provision for carried interest) of the Fund’s investments by (ii) the capital invested by the Fund (including fees and expenses but excluding carried interest). Total residual value of an investment is defined as the fair market value together with any proceeds from the investment that have not yet been realised. Gross Multiple is used to evaluate the return on an Antin Fund in relation to the initial amount invested

Investments: Signed investments by an Antin Fund or by an affiliate of an Antin Fund

Management Fees: Management fees are recurring revenue which Antin receives for the fund management services provided to Antin Funds. Such fees are recognised over the lifetime of each Antin Fund, which generally have ten-year initial terms with two optional extensions of one year each. The underlying investments of the Antin Funds are held on average for five to seven years

Realisations: Cost amount of realisation of investments through a sale or write-off of an investment made by an Antin Fund. Refers to signed realisations in a given period

% Realised: Measures the share of a fund’s total value creation that has been realised. Calculated as realised value over the sum of realised value and remaining value at a given time

Realised Value / (Realised Cost): Value (cost) of an investment, or parts of an investment, that at the time has been realised

Remaining Value / (Remaining Costs): Value (cost) of an investment, or parts of an investment, currently owned by Antin funds (including investments for which an exit has been announced but not yet completed)

Step-Downs: Normally resulting from the end of the investment period in an existing fund, or when a subsequent fund begins to invest

Underlying EBITDA: Earnings before interest, taxes, depreciation, and amortisation, excluding any non-recurring effects

Underlying Profit: Net profit excluding post-tax non-recurring effects

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FINANCIAL CALENDAR
3Q 2026 Activity Update: 5 November 2026