

DIGI

Investor Presentation

October 2026

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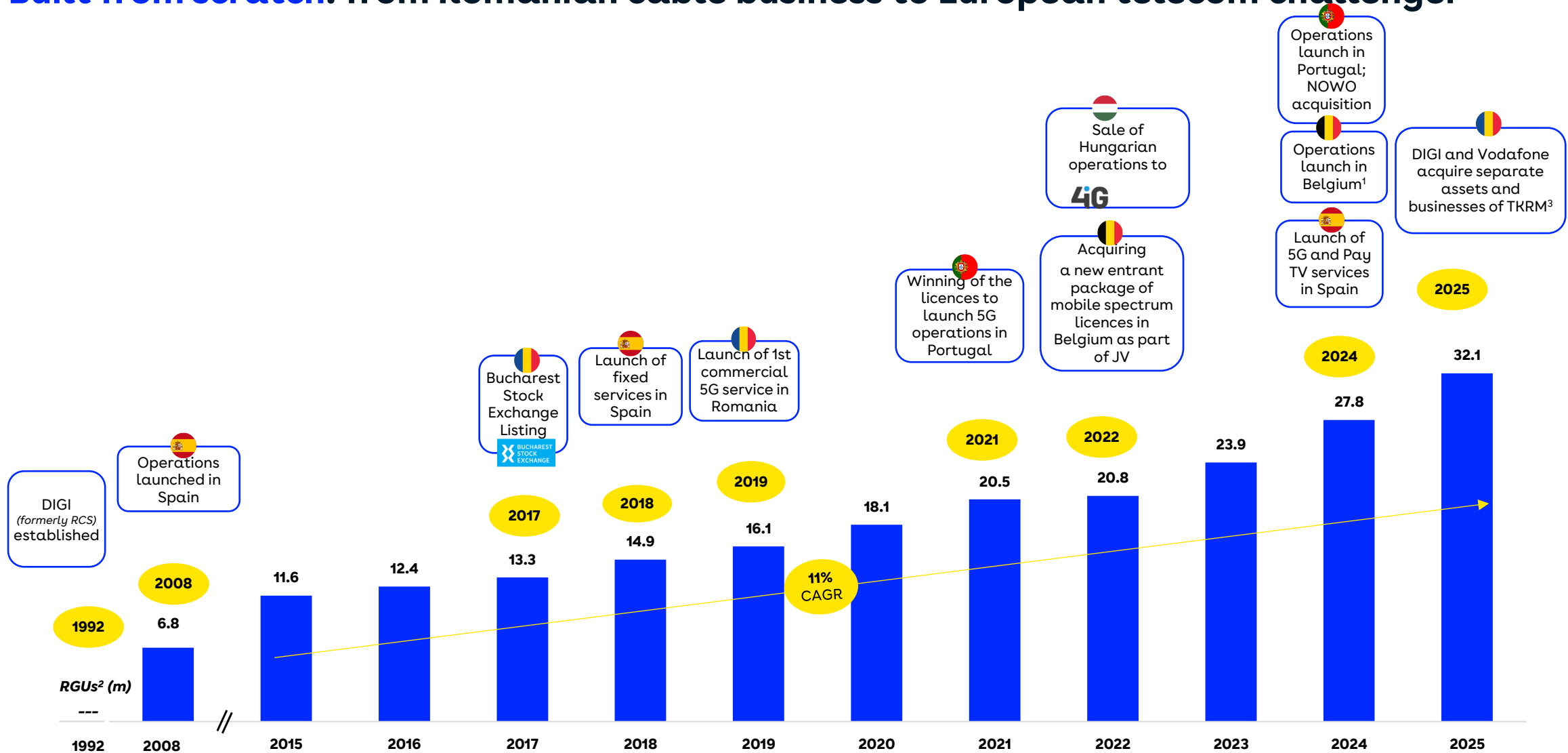
Who we are

DIGI

At Digi Communications, our goal is to harness
cutting-edge technology to provide
superior communication services to **Our**
customers at the most **affordable**
prices



Built from scratch: from Romanian cable business to European telecom challenger



Source(s): Company information.

Note(s): 1. Belgium is treated as a JV investment and therefore is currently not being consolidated. 2. Including discontinued operations. 3. Telekom Romania Mobile.

DIGI today: a reputable operating platform compounding growth across important European markets

2025 Revenues

€2,221m

+15%YoY

excl. extraordinary gains

2025 Adjusted EBITDA

€710m

+4%YoY

RGUs as of 31.12.2025

32.1m

+15%YoY

+4.3m YoY

Our Markets

Core



Emerging



Our Blueprint



SUPERIOR
INFRASTRUCTURE



CUSTOMER-
CENTRICITY



VALUE
LEADERSHIP



DESIGNED FOR
COST EFFICIENCY

A convergent model across all markets



Mobile
communications



Fixed internet



Pay TV



Fixed telephony



Digi's 4-Pillar strategy: one operating model adapted to local realities



Superior infrastructure

- Leverage advanced **fiber and mobile** networks
- Top coverage with **4G** mobile network with **5G** in active deployment
- Maximise advantage in **speed** and reliability
- **Expand coverage and capacity** of fixed and mobile networks



Customer-centricity

- **Integrated business model**, with in-house teams across deployment, O&M, installers, customer care, sales force; proprietary IT stack
- Results in **faster execution and higher customer satisfaction**
- **Lowest complaint rate in the market¹**: 20% of complaints to ANCOM vs 50% of RGUs (0.4x), compared with Orange 1.0x and Vodafone 2.0x



Value leadership

- Customer promise: **reliable, high-performance connectivity** at honest pricing
- **Transparent, stable** and **fair** terms for the clients
- Focus on **buy what you need**



Designed for cost efficiency

- Control cost base through **in-house operations** creating **structural competitive cost advantage**
- **Strong operational leverage** leading to lower unit costs and strong margins

Superior infrastructure: fiber-led platform enabling structural advantage

Core markets

Emerging market



Romania

Very dense nationwide high-fiber network covering more than 95% of population.

Upgraded the FTTB/FTTH network to GPON or similar technology, offering speeds up to 10 Gbps.

Faster and more cost-effective service compared to traditional networks.



≈**9.1 m**
Homes passed



≈**65,000 km**
Fixed fiber backbone network



Spain

New technologically advanced fiber network in the SMART footprint - 100% GPON - and the largest XGS-PON footprint in Spain, 95%.

Combination of DIGI's SMART footprint and wholesale access to Telefonica NEBA network.



≈**14.8 m**
Homes passed



≈**10,500 km**
Fixed fiber backbone network



Portugal

Digi's network coverage exceeds 2.3m households.

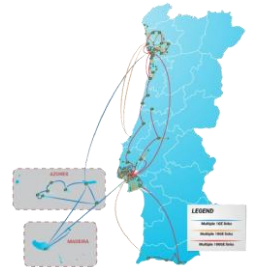
Further network expansion in execution.



≈**2.3 m**
Homes passed



≈**1,800 km**
Fixed fiber backbone network



Superior infrastructure: a modern and resilient mobile network

Core markets

Emerging market

 Romania

Largest population coverage (more than 99.5%) and expanding base stations

Frequency blocks in the 800, 900, 1800, 2100, 2600 and 3500 MHz bands

Constantly enhancing mobile network performance and the customer experience through expanding coverage and capacity



9,600 Base stations



8.4m Mobile users

 Spain

Transition from MVNO to MNO completed in Q3 2025

Frequency blocks in the 1800, 2100 and 3500 MHz bands

Combination of own network and national roaming achieving national coverage



1,363 Macro-sites (Jun-26)
Target: 5,000 by end-2028 and 10,000 by end-2030



7.8m Mobile users

 Portugal

Own mobile network built in the last 4 years covering 98.9% of population

Frequency blocks in the 900, 1800, 2600 and 3500 MHz bands

More than 4600 sites deployed. Targeting 5100 base station by the end of 2026, in line with competitors.



4,600 Base stations



545k Mobile users

Customer-centricity & value leadership: integrated model delivering consistent outperformance

Fully integrated operating model

- In-house teams across network design, deployment, O&M and optimization ensuring consistent service quality
- End-to-end control of service delivery process
- Proprietary IT stack and internal sales & customer care capabilities
- Reduced outsourcing dependency → faster execution & cost discipline

Simple, transparent product architecture

- High-performance connectivity (fiber & 4G/5G)
- Flat, predictable tariffs with generous data allowances
- Convergent services (fixed & mobile) tailored to customer needs, without forced bundles
- No differentiation between existing and new customers

Structural value leadership

- Reliable, high-quality services at honest price points
- Competitive positioning supported by owned infrastructure
- High customer acquisition and strong portability performance

Growth is driven by **structural value delivery**, not promotional intensity

Romania: **DIGI No. 1 across segments** with ongoing growth momentum

Market share
Reported by ANCOM as at 31.12.2025

	DIGI		
Mobile	33.9%	33.7%	32.4%
Mobile Postpaid B2C	48.2%	27.1%	24.7%
Broadband	73.5%	15.1%	9.7%
Pay TV	76.7%	12.5%	8.5%
Fixed telephony	63.7%	22.0%	14.0%
Multiple play			

Market shares include all PayTV technologies (including but not limited to Cable TV and DTH)
Vodafone includes Telekom Romania Mobile (part of Vodafone group since Q4 2025).

Q2 2026 RGU evolution
DIGI

		YoY	Q2 2026 EoP
Mobile		+20%	8,424k RGUs
Broadband		+4%	5,244k RGUs
Pay TV		+2%	6,055k RGUs
Total		+10%	19,723k RGUs

% represents change in Romanian RGUs between 30.06.2025 and 30.06.2026, according to Company data

In 2025, Digi ranked number one in mobile portability in Romania for the **13th** consecutive year, **+782,975** mobile portability amounting to **53.85%** of all transfers made.

Rețea națională.
Acoperire totală.
Suntem nr. 1 la acoperire
mobilă națională.*

*Conform rapoartelor g3nurilor ANCOM din 2024 privind planurile de servicii de comunicații electronice, gradul de acoperire
națională este raportat și evaluat periodic în numărul de acoperire pe servicii de comunicații

Phased market expansion supporting long-term growth, anchored in a **proven operating model**



Proof of concept

- Leadership across fixed services (broadband, PayTV, telephony)
- Strong mobile momentum given room to grow market share further
- CAPEX intensity: low
- Cash engine



Current and future growth engine

- Most significant growth engine of the group for the next 5-years
- MNO economics in effect as of July 2025
- Net add leadership for 17 consecutive quarters in fixed & mobile
- CAPEX intensity: set to decrease



Emerging operations

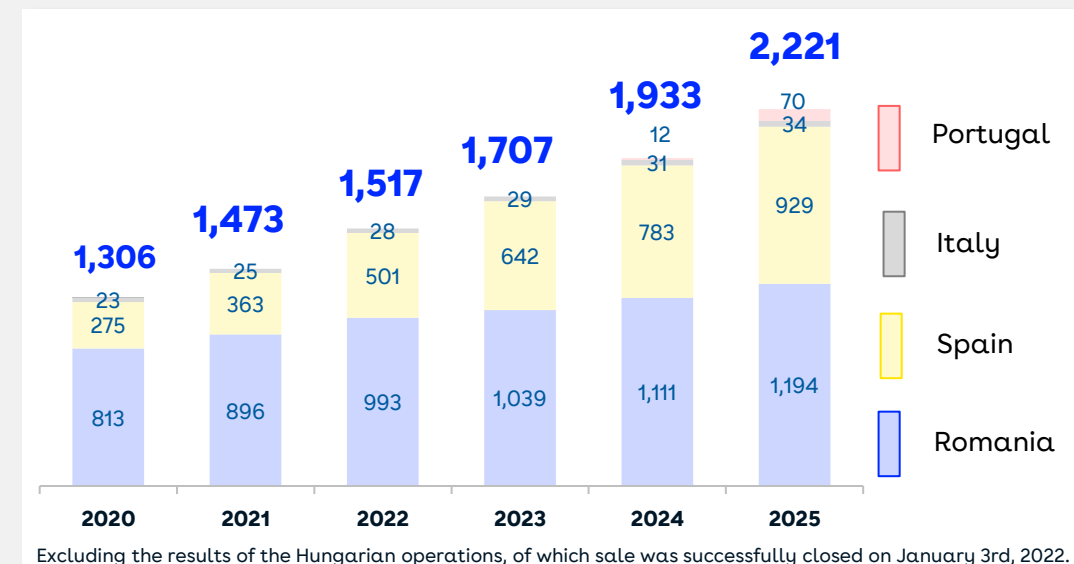
- Currently in the build phase (network expansion, NOWO integration)
- Preparing for growth in the next scaling cycle
- CAPEX intensity: high

Historical financial performance

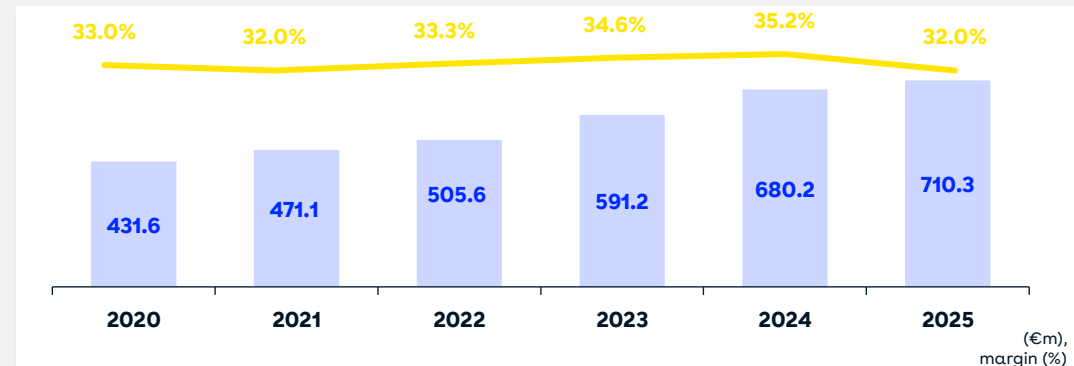
DIGI

5-year expansion supported by all markets and product segments

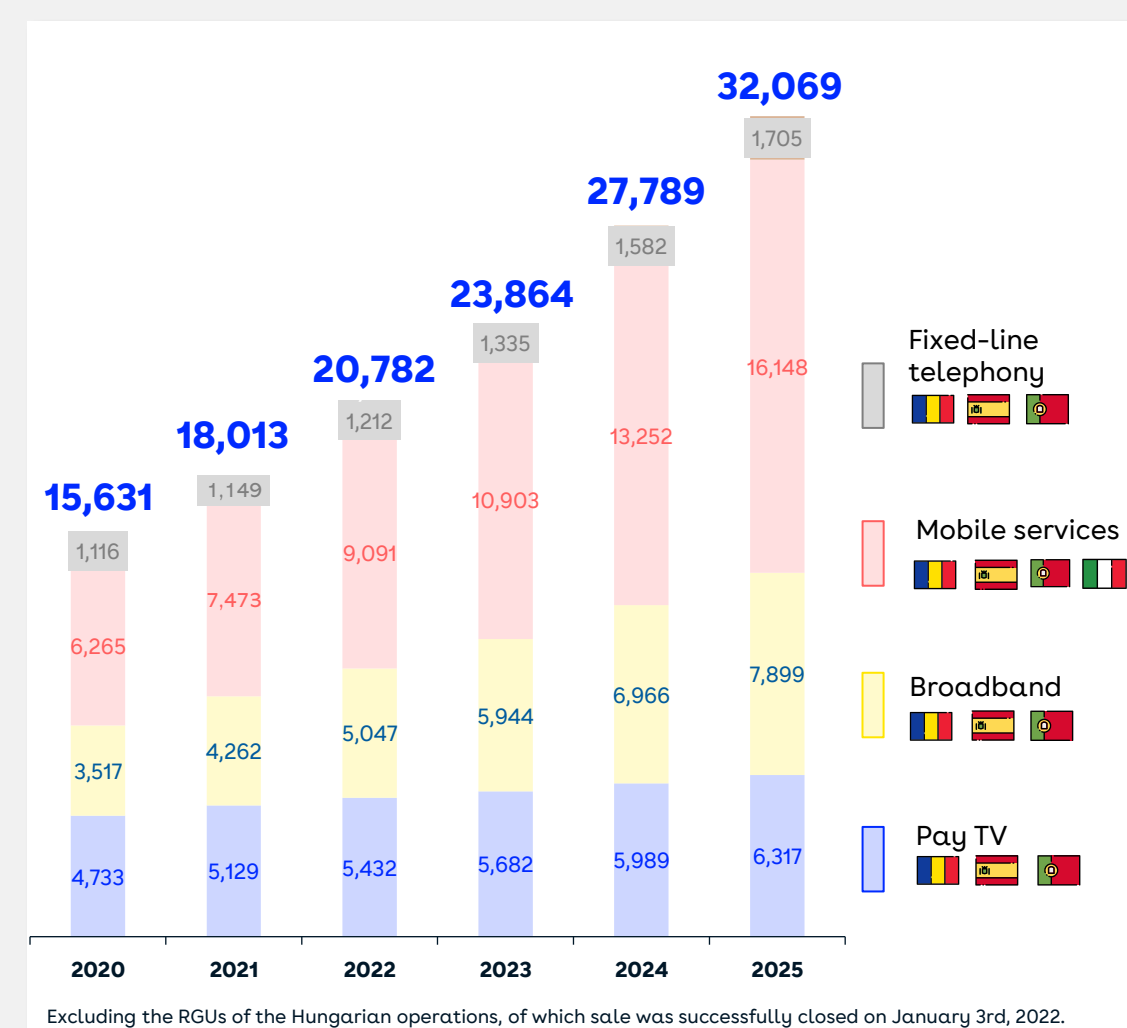
Group Revenues and other income (€m)¹



Adjusted EBITDA (excl. operating leases)



RGUs ('000) per business line



Source: Company data.

Notes: 1) Revenues per country include intersegment revenues in total amount of € 3.2 million for 2025

Consistent five-year progress across all **key value drivers**

	in 2020	in 2025	Change
RGUs	15.6m	32.1m	▲105.8%
ARPU _s	€5.7	€5.7	-
Revenue	€1,306m	€2,221m	▲ 70.1%
Group Adj. EBITDA / margin ¹	€431.6m / 33.0%	€710.3m / 32.0%	▲ 64.6% / (1.0p.p.)
Net Debt ² / Adj. EBITDA	2.7x	3.2x	▲+0.5x
 Total # of homes passed / % network upgraded to GPON	7.7m / 92%	9.1m / 99.9%	▲ +1.4m / +8p.p.
 % of dwellings covered / Take-up rate	84.3% / 60.8%	95.1% / 69.9%	▲ +11p.p. / +9p.p.
 Total # of homes passed	1.2m	13.7m	▲ 12.5m / +11.4x
 % of dwellings covered / Take-up rate	4.5% / 4.0%	51.3% / 15.8%	▲ +47p.p. / +12p.p.

Source(s): Company information.

Note(s): 1. Group Adjusted EBITDA Margin is the ratio of Adjusted EBITDA to the sum of (i) revenue and (ii) other income (excluding other income from extraordinary sale of assets). 2. post-IFRS.

2025 Performance by market

(€m) December 31, 2025	 Romania	 Spain	 Portugal	 Italy and Group operations ¹	 Total ²
Revenues and other income ³	€ 1,193.7	€ 929.1	€ 69.9	€ 34.4	€ 2,221.4  15%
Adjusted EBITDA ex-operating leases ⁴	€ 495.1	€ 175.2	€ (81.5)	€ (2.2)	€ 586.6  1%
RGUs ('000)	# 19,856	# 10,838	# 850	# 524	# 32,069  15%

Source: Company data

Notes: 1) In this Report, unless otherwise stated, as part of our "Other" segment we only present the results of our Italian operations, for revenue, and the results of our Italian and Dutch operations for operating expenses;

2) Total Group revenues excluding intersegment revenues;

3) Revenues per country include intersegment revenues in total amount of € 3.2 million for 2025, as well as the non-recurring gain resulting from the sale of assets (2025: EUR 53.3 million; 2024: EUR 399.3 million);

4) Adjusted EBITDA excluding IFRS 16 is computed as Adjusted EBITDA decreased by the rental expense recognized in line with IFRS as in effect at 31 December 2018

H1 2026 financials

DIGI

H1 2026 Results overview



Revenue
and other income excluding
extraordinary sale of assets



10%

€ 1.2 bn (€ 1.1 bn in H1 2025)¹



RGU



14%

YoY increase up to 34 m
(+ 4.1 m RGUs H1 2026/ H1 2025)



EBITDA
ex. operating leases



19%

€ 330.4 million (€ 278.1 million in H1 2025)



Romania RGU  **+9%**

Mobile: 8.4m RGU (+ 20% YoY); **new market leader**²
Pay TV: 6.1m RGU (+ 2% YoY)
Broadband: 5.2m RGU (+ 4% YoY)



Spain RGU  **+23%**

Mobile: 7.8m RGU (+ 19% YoY)
Broadband: 2.9m RGU (+ 28% YoY)
Fixed telephony: 0.9m RGU (+ 25% YoY)

Note: 1) The amount excludes the non-recurring gain arising from the sale of Digi Spain's Fiber-to-the-Home (FTTH) network (H1 2026: EUR 14.9 million; H1 2025: EUR 31.2 million)

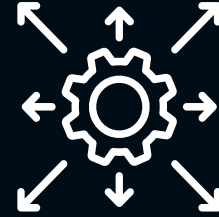
2) By active SIM cards at 31.12.2025 (Digi 33.9%); ANCOM statistical data report H2 2025

Continued **strategy execution** in H1 2026



Sustained RGU growth across **core markets**

- We continued the outstanding growth in Spain
- Sustained the very good growth results in Romania, Italy and Portugal
 - ▣ Romania RGUs +9%
 - ▣ Spain RGUs +23%
 - ▣ Italy RGUs +4%
 - ▣ Portugal RGUs +22%



Continued network expansion

- **Romania:** expanding the mobile network; rolling out equipment to service the newly acquired frequencies and increase in the 5G footprint
- **Spain:** continued development of fixed and mobile networks
- **Portugal:** consolidating the mobile and fixed infrastructures



Scaling up in Portugal and Belgium

- Solid RGU growth since launch:
 - ▣ **Portugal RGUs** 960k
 - ▣ **Belgium mobile RGUs** 108k

Key developments in H1 2026 and after



Admission to trading of DIGI Spain shares

- DIGI Spain's shares began trading on the Spanish Stock Exchanges on 16 July 2026, following the successful completion of its initial public offering.
- The offering comprised 51.3 million ordinary shares, priced at EUR 5.60 per share. The offering raised approximately EUR 287 million, valuing DIGI Spain at an initial market capitalization of approximately EUR 1.7 billion.
- DIGI Spain is listed on the equity segment of the Spanish Automated Quotation System, Mercado Continuo, under the ticker **DIGIS**.
- DIGI Communications retains approximately 80% ownership of DIGI Spain following the successful completion of the offering.



Acquisition of a 51% shareholding in Whyfibre Limited

- The Company has taken the initial steps to enter the telecommunications market in the United Kingdom. On 19 March 2026, its wholly owned subsidiary incorporated in England, Fiber One Ltd., acquired 51% of the share capital of Whyfibre Limited, which owns a fibre network currently under deployment in the counties of Bedfordshire and Hertfordshire in southern England.

Q2 2026 Market highlights

(€m) June 30, 2026	 Romania	 Spain	 Portugal	 Italy, UK and Group operations ¹	 Total ²
Revenues and other income ³	€ 318.9	€ 267.4	€ 18.9	€ 8.9	€ 612.8  9%
Adjusted EBITDA ex. operating leases ⁴	€ 133.2	€ 53.5	€ (16.0)	€ (1.5)	€ 169.2  23%
RGUs ('000)	# 20,497	# 11,881	# 960	# 535	# 33,873  14%

Source: Company data

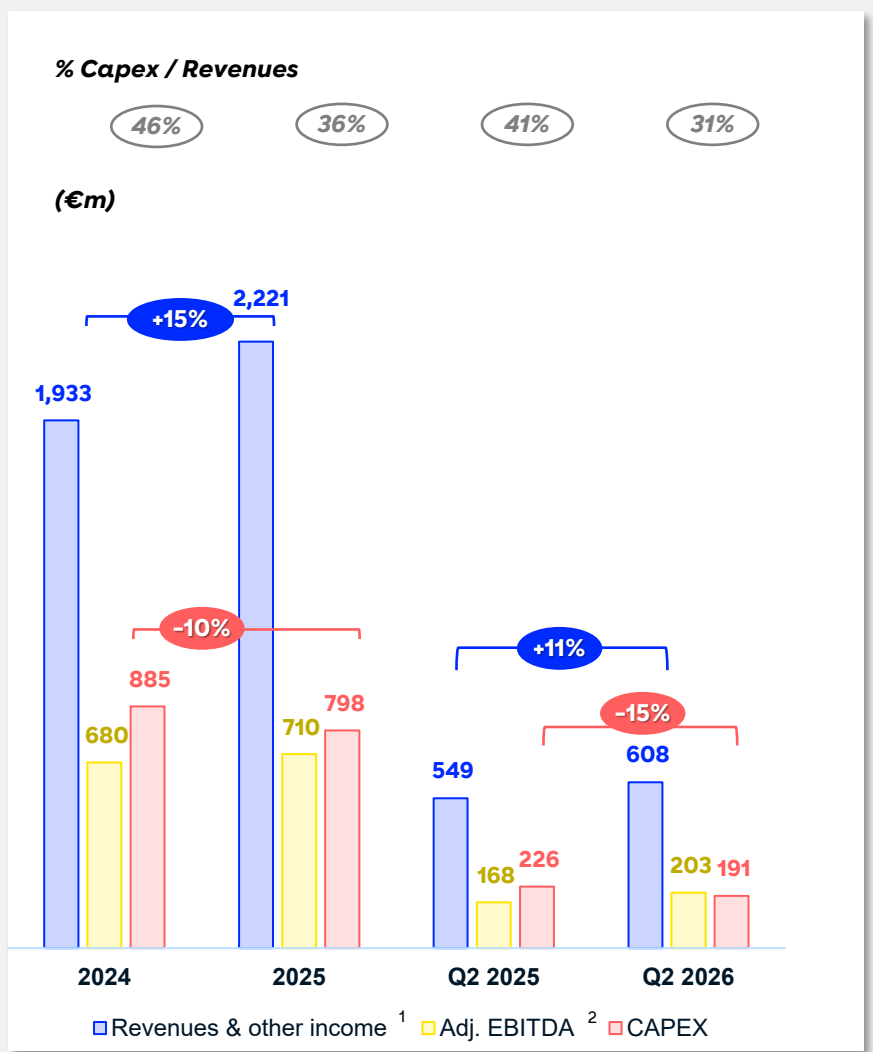
Notes: 1) In this Report, unless otherwise stated, as part of our "Other" segment we only present the results of our Italian operations, for revenue, and the results of our Italian, UK and Dutch operations for operating expenses;

2) Total Group revenues excluding intersegment revenues;

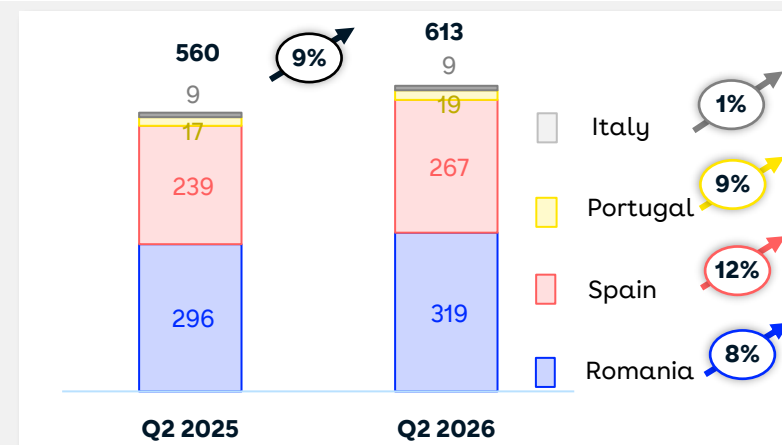
3) Revenues per country include intersegment revenues in total amount of EUR 1.4 million for Q2 2026, as well as the non-recurring gain resulting from the sale of assets (Q2 2026: EUR 4.6 million; Q2 2025: EUR 10.2 million);

4) Adjusted EBITDA ex. operating leases is computed as Adjusted EBITDA decreased by the rental expense recognized in line with IFRS as in effect at 31 December 2018

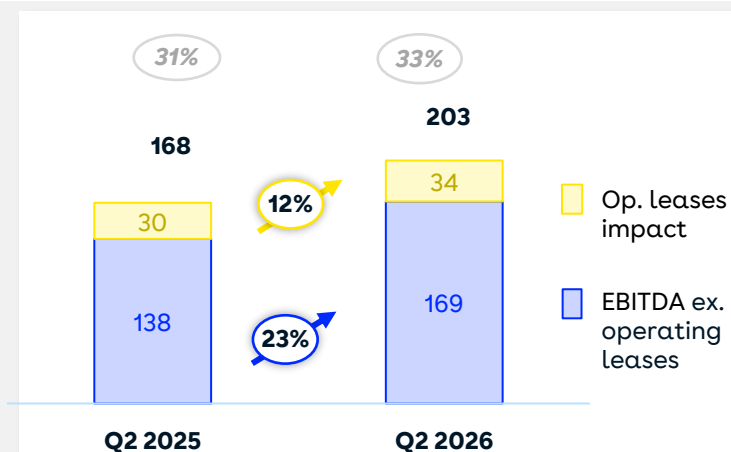
Q2 2026 Financial highlights



Group Revenues and other income (€m)³



Group adjusted EBITDA (€m)¹ and margin (%)



Key considerations

- **Revenues and other income** up 9% based on strong customer growth in Spain and Romania. While the revenues in Spain grew by 12% and in Romania grew by 8%.
- **EBITDA ex. operating leases** increased by 23% YoY primarily as a result of expansion to new territories.
- **CAPEX amounting** to EUR 191 million (347 million in 1H26) represents the group's commitments to invest in Spain, Romania, Portugal and UK.

Source: Company data

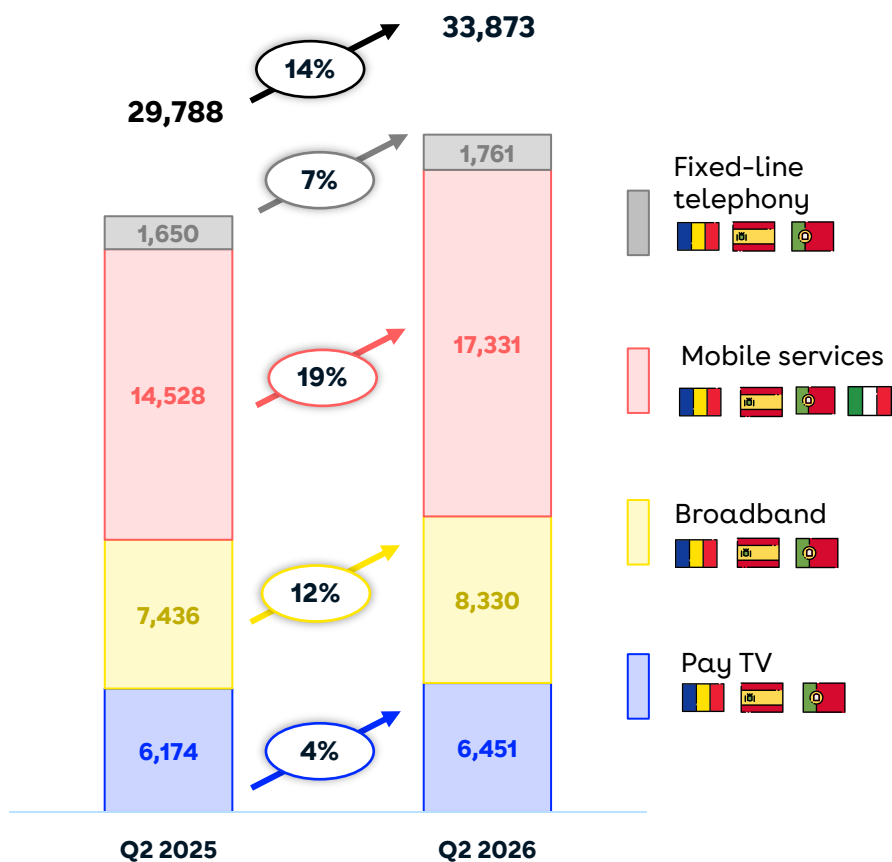
Notes: 1) Revenues per country include intersegment revenues in total amount of EUR 1.4 million for Q2 2026, excluding extraordinary sales of assets.;

2) Adjusted EBITDA is defined as EBITDA adjusted for the effect of extraordinary or one-off/non-recurring items.

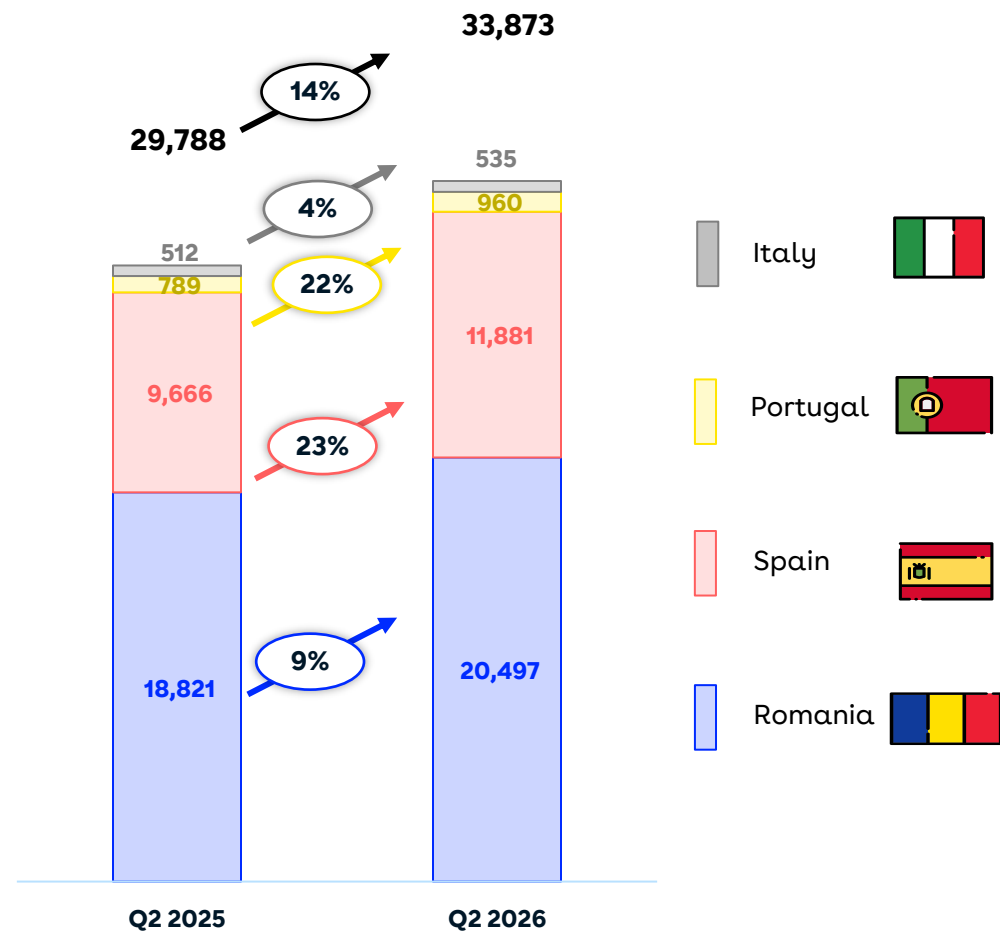
3) Revenues per country include intersegment revenues in total amount of EUR 1.4 million for Q2 2026.

Q2 2026 RGU growth

RGUs ('000) per business line



RGUs ('000) per market





Romania

+361,687 mobile portability
Jan - June 2026

Rețea națională. Acoperire totală.
Suntem nr. 1 la acoperire mobilă națională.*

*Cădere raportului pierderilor ANCOM de 2024 privind serviciile de comunicații electronice, gradul de acoperire al populației în ceea ce privește serviciile de comunicații electronice, raportat la populația totală a țării.

Roaming activat, griji dezactivate.
Poartă-te în cea mai primitoare rețea și bucură-te de vară fără limite.

de la

3€ /lună

Abonament Nelimitat



Spain

+770,825 mobile portability Jan-June 2026;
Net portability gain **337,277**
+139,900 fixed portability Jan - June 2026;
Net portability gain **113,897**



5 años siendo los más rápidos
Red de fibra más rápida de España desde 2021
Verificado por Ookla*.

DIGI, Móvil • Fibra

Móvil
2 líneas
ilimitado

Fibra
+500Mb

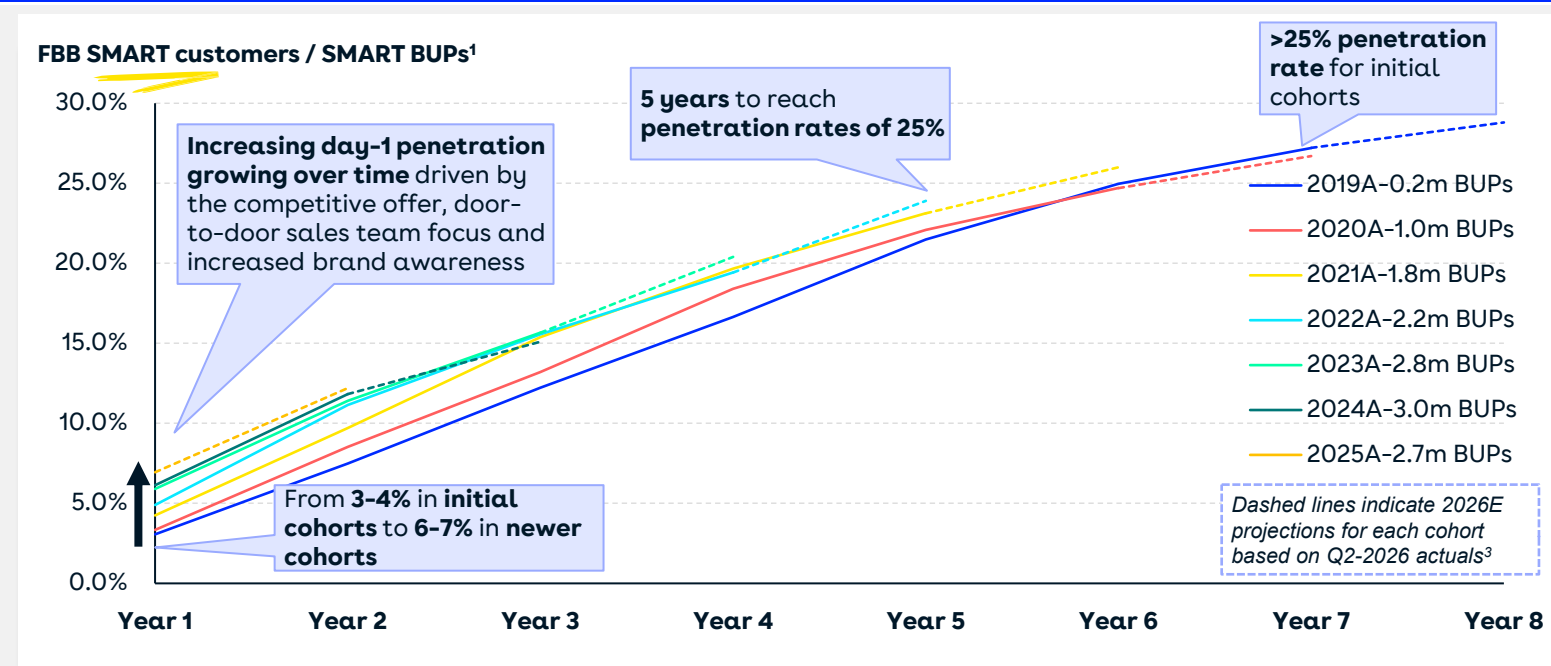
22€ /mes

disponible en zonas de Fibra SMART

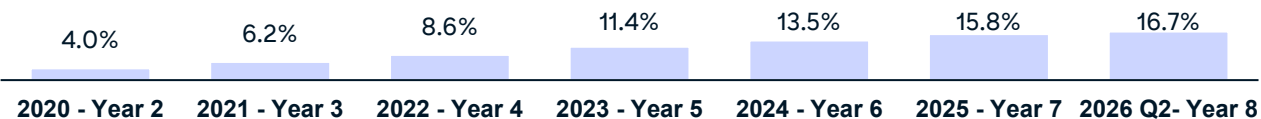
Seguimos sin subir nuestros precios en 2026

DIGI Spain SMART footprint shows rising penetration across all cohorts and sets the ground for structural growth already reaching >25% for early cohorts

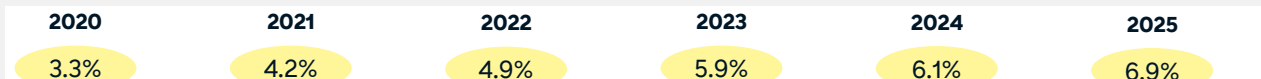
Penetration rate of SMART footprint by cohort (as of Q2 2026)³



SMART footprint average penetration rate²



Penetration rate in year 1



Key considerations

- **FTTH SMART Footprint roll-out:**
 - **14.8m BUPs** (52% of the 28.6m addressable BUPs), out of which **621k** deployed in **Q2 2026**, **570k** in **Q1 2026** and **2.7m BUPs** in **2025**
 - **Objective to reach a ~21m BUPs** SMART footprint by **2030**
 - **SMART Footprint** roll-out with own personnel has enabled a very competitive **average historical FTTH deployment cost of €50.8/BUP**
- **Penetration & technology**
 - Newer cohorts start with higher take-up and ramp-up faster (**2025 at 6.9%** average penetration rate in first year), with all cohorts converging to similar **take-up levels over time**
 - **Initial cohorts 2019** and **2020** reached levels of penetration of **28%** and **26%**
 - **Penetration rate continues to grow in all cohorts**, even in the initial ones
 - **XGS-PON coverage at 95%**, supporting high-quality penetration ramp-up
- **Delivery milestones:**
 - SOTA roll-out ahead of plan with **5.7m BUPs already delivered**
 - SOTA final delivery up to the 6m BUPs objective by **Dec 26** with **120m** remaining cash to be received for SOTA sale

Source: Company information

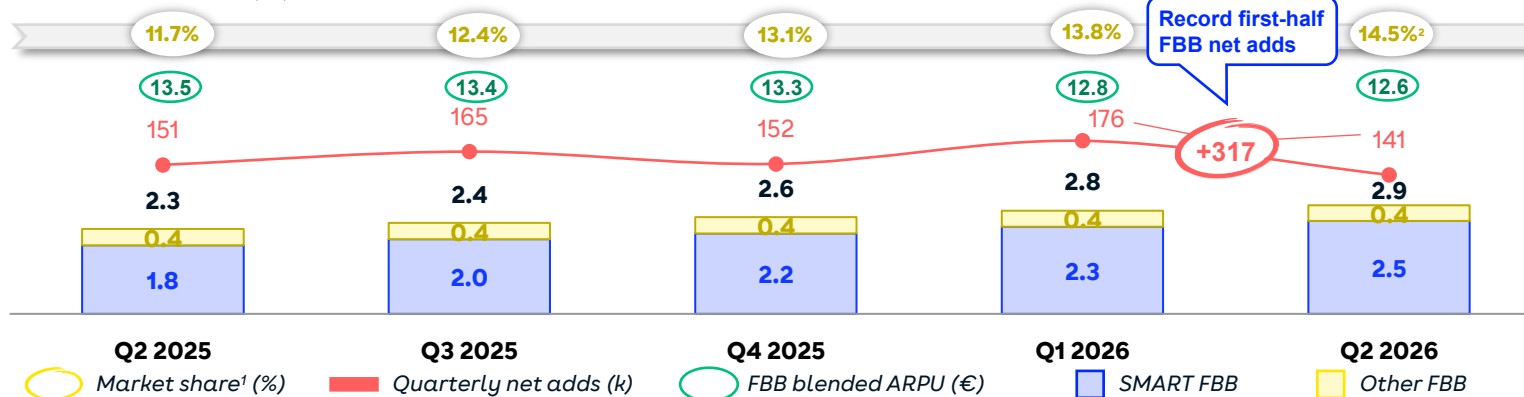
Notes: 1) SMART BUPs: refers to all business units passed available commercially for subscription that were deployed by DIGI in Spain for which the SMART commercial offer is available; 2) customers on SMART footprint / total active SMART BUP 3) 2026 cohort data points include Q2 2026 actuals and extrapolated Q3-Q4 performance based on L12M growth by cohort

DIGI Spain accelerated growth momentum continued into Q2 2026

Customer growth QoQ

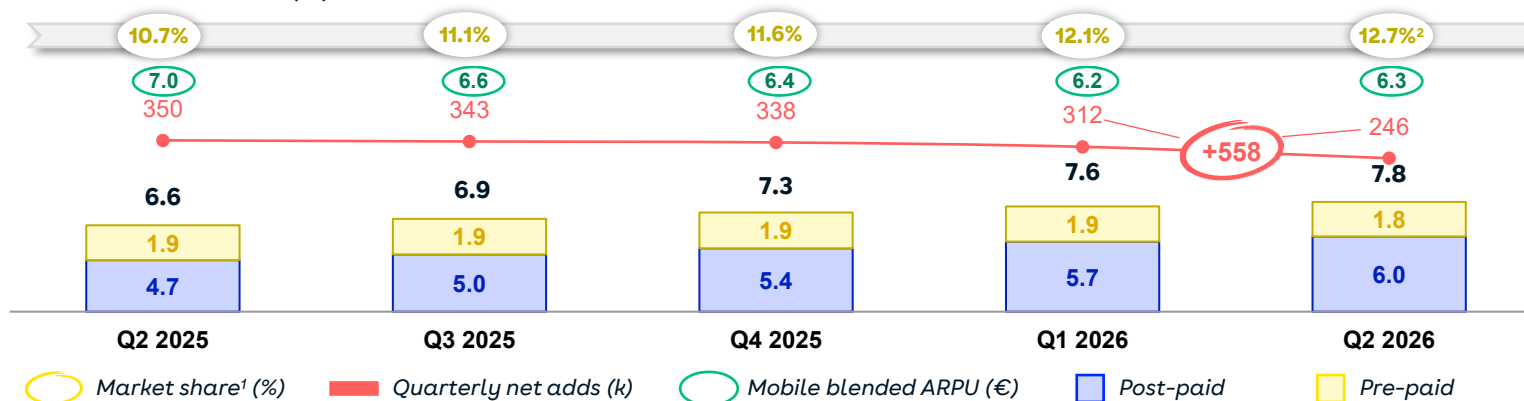
Fixed broadband

of FBB subscribers (m)



Mobile

of Mobile subscribers (m)



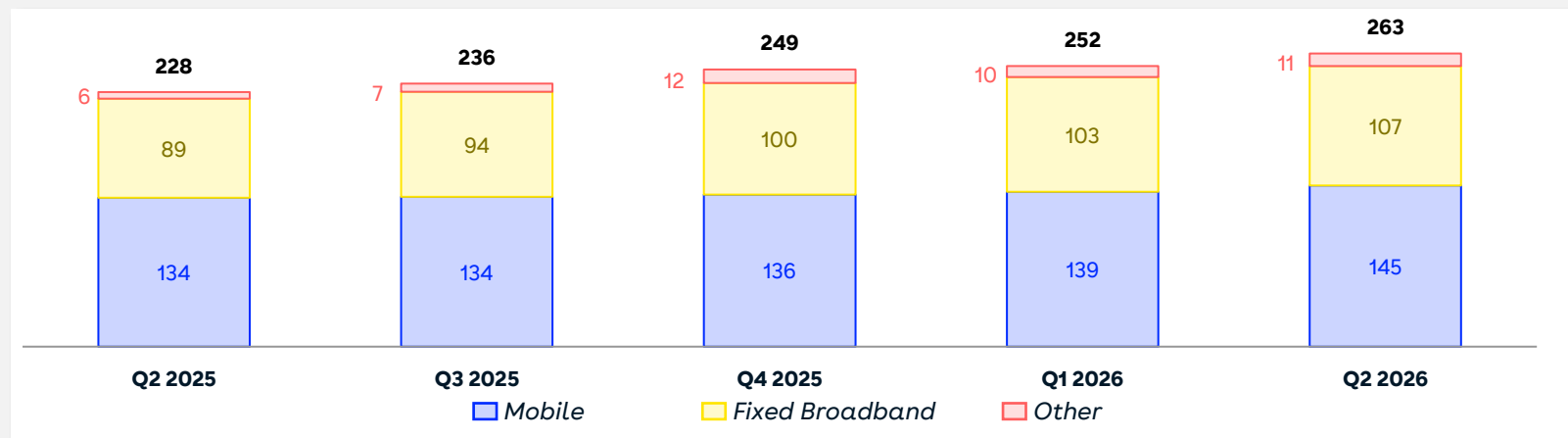
Key considerations

- **Increased commercial traction – H1 2026** marks DIGI Spain's **strongest growth semester** ever for **fixed broadband** (more than **317k** net gain) together with consistent growth on **mobile** (more than **558k** net gain)
- Fixed Broadband remains the **structural growth engine**:
 - **100% of FBB net growth** since 2022 driven by **SMART footprint**,
 - **22% of new FBB customers in the quarter were not previously a FBB customer**, meaning DIGI is also creating significant new demand and expanding the FBB market
 - FBB SMART LTM churn at **15.4%** and blended churn at **17.0%**, reducing churn intensity during the quarter vs Q1 26 (**16.7%** 3M annualized Q2 26 churn).
- **Mobile**:
 - **90% of mobile net adds** achieved in the last 6 months **from convergent mobile services**
 - **Market leader on mobile portability net gains** since Q3 2020
 - **1,363 macro-sites** active for DIGI own mobile network by Q2 26
- **ARPU dilution** related to transition to MNO commercial offer model and by larger customer base of SMART customers overall

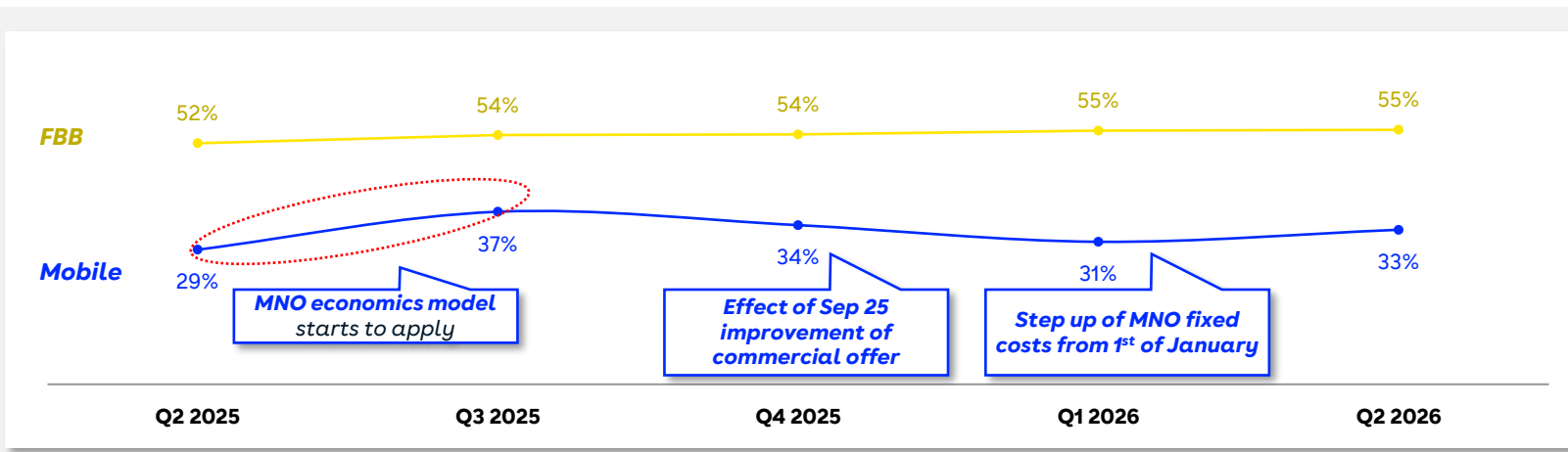
Note: 1) Based on data reported by the CNMC quarterly up to March 26; 2) Calculated based on CNMC published market data as of May 2026 and extrapolated to June 2026 based on DIGI Spain reported data to CNMC;

DIGI Spain structural margin expansion driven by owner-economics network model and MNO transition further blending into Q2 2026

Quarterly revenue evolution per product (€m)¹



Quarterly gross margin evolution per product (% of sales)



Key considerations

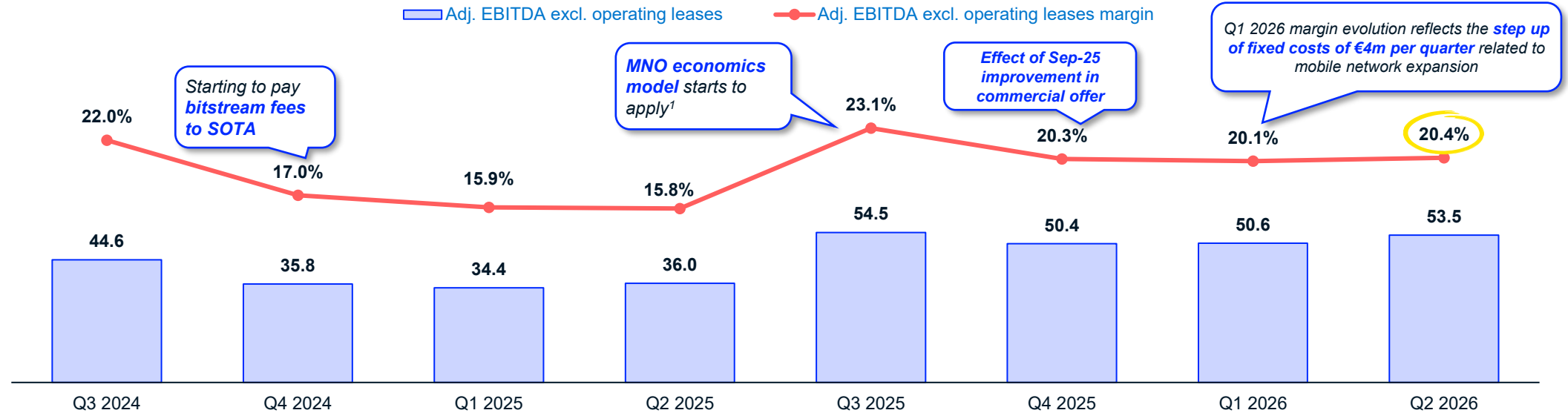
- **Quarterly revenue increased to €263m in Q2 2026** (15% YoY), reflecting continued customer growth and convergent traction
- **Revenue growth supported by SMART footprint expansion and commercial offer improvement** despite short-term erosion in ARPU due to improved offer in Sep 2025
- **Fixed Broadband margins** structurally expanding:
 - **FBB gross margin increased to 55%** in Q2 2026, reflecting scale **benefits of the owner economics model**
 - **Margin uplift driven** by increase in penetration of the **SMART footprint** and **operating leverage** as rollout advances
- **Mobile margins reflecting MNO transition dynamics:**
 - **MNO economics** started to apply **from July 2025**, improving mobile costs structure and increasing cost visibility
 - Q4 2025 margin evolution reflects short term **effects from commercial adjustments in Q3 2025**
 - Q1 2026 margin evolution reflects the step up of fixed costs of **4m per quarter** related to mobile network expansion
 - No further downward impact on margin foreseen in coming quarters

Note: 1) Revenues in this slide are presented at Spanish group level (contain intragroup revenues)

Owner-economics model translating into structural EBITDA uplift

DIGI Spain continues its strong growth in H1 2026 and confirms its 2026 guidance

Adjusted EBITDA exc. operating leases (€m) and margin (%)



H1 2025

Q3 2025 to Q2 2026

Margin in H1 2025 reflecting MVNO model

- Not including impact of owner economics resulting from agreement with Telefónica
- Mar and May 25 improvement across mobile convergent and mobile-only unlimited data offers

- **MNO economics starts to apply from July 2025** with full impact of mobile infra economics for 4 consecutive quarters
- Sep 25 improvement across convergent and mobile-only unlimited data offers, with a **€1.1m revenues impact in Q3 2025** and a **€6.6m impact for Q4 2025**
- Q1 2026 margin evolution reflects the step up of fixed costs of **4m per quarter** related to mobile network expansion, with growth expected in the next quarters in line with guidance for 2026

Q2 2026 Financial profile

Financial liabilities as of June 30, 2026¹

Facility	Amount (€m)
Senior Secured Notes	600.0
Senior Facility	927.0
Export Credit Arrangements (ECA)	168.2
Financial leases	61.6
Other long-term debt	182.0
Other short-term debt	151.1
Total gross debt	2,090.0
Cash on BS	41.4
Total net debt	2,048.6
Net IPO proceeds	261.0
PF net debt after IPO proceeds	1,787.6

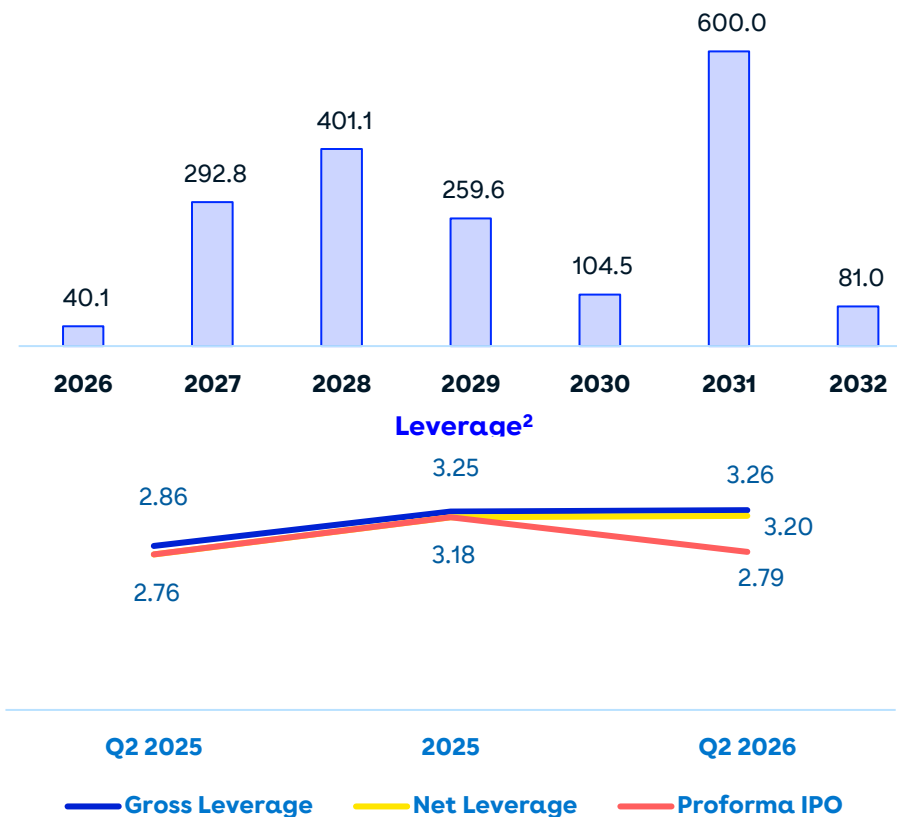
Following the Spanish IPO as mentioned in the Prospectus we present the Leverage on a proforma basis, considering the net IPO proceeds of EUR 261 million:

Proforma Net Leverage for the Digi Group June '26:

2.79

Notes: 1) Indebtedness as per Notes requirements. As per the Notes Covenants, debt is presented under IFRS available at the signing date, therefore ex. operating leases implications and long-term payables for spectrum licenses;
2) The Net Leverage and Gross Leverage are computed using EBITDA ex-operating leases as per the Notes Covenants. Covenant's computation for the Net Leverage from the Senior Secured Notes uses EBITDA adjusted as per Indenture requirements, which is different from the Adjusted EBITDA in this presentation.

Maturity profile long-term loans & notes (€m)



2026 Prospects

Continuous growth in core markets



Romania

In **Romania**, we continue to improve mobile network performance and enhance the overall customer experience.

We show a very strong performance on mobile services, while maintaining a strong and stable position in fixed services.

Our strategy is firmly centered around the customer, with a clear focus on both quality and affordability.

We remain committed to delivering reliable, high-performance connectivity at competitive prices.



Spain

Spain remains DIGI's primary growth engine, driven by the three-pillar strategy, continued network expansion, strong subscriber growth, and a sharp focus on operational efficiency to reinforce its market position.

In 2025, DIGI Spain started benefiting from the transition from a mobile virtual network operator (MVNO) to a mobile network operator (MNO), marking a significant step forward in its long-term development.

In H1 2026, Digi Spain continues to show a strong commercial performance confirming it is on track to achieving its guidance.

New markets launched



Portugal, Belgium and UK

The priority for **Portugal** continues to be the expansion of its customer base, the improvement of the customer experience, and the integration of Nowo, to unlock synergies, ensuring a stronger market position and sustainable growth.

In **Belgium**, DIGI will continue network expansion and customer growth.

In **UK** we are deploying and have already begun testing on a pilot format a fibre network.

Contact

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DIGI