



# FIRST QUARTER 2023

Financial Results

**METRO  
PACIFIC**  
INVESTMENTS

03 MAY 2023

- **Financial Highlights**
- **Consolidated Income**
- **Stand-alone Performance of Operating Companies**
- **Growth, Expansion, and Recent Developments**
- **Sustainability at MPIC**
- **Other Matters**

## **APPENDIX**

Consolidated Income Statement

Share in Operating Core Income

Condensed Income Statements of Operating Companies

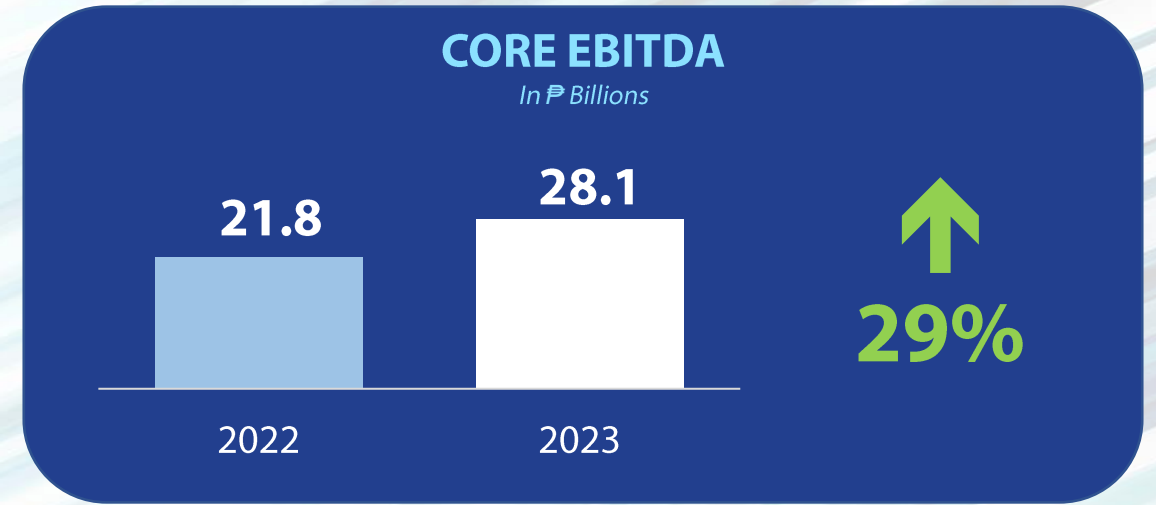
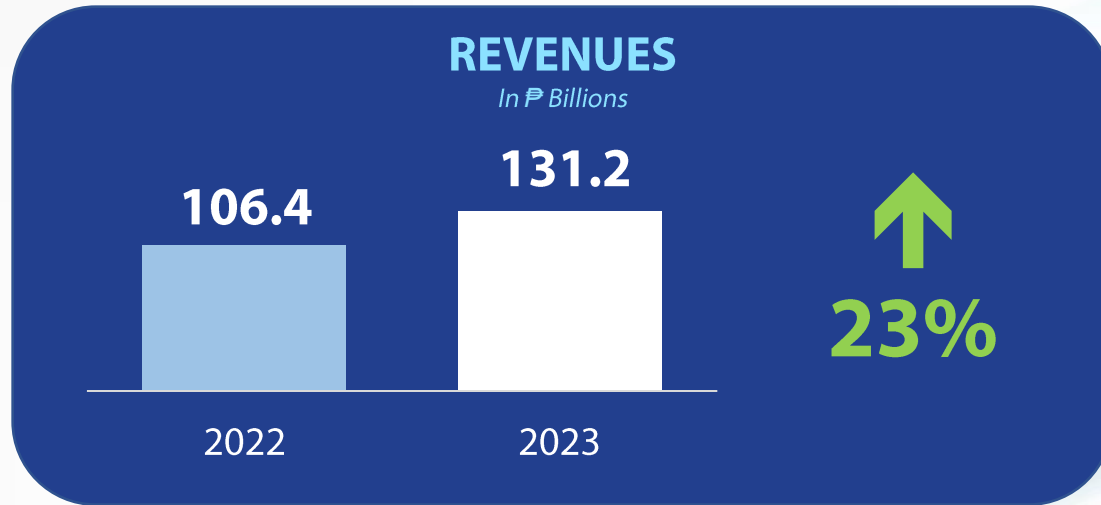
Debt Profile

Balance Sheet Highlights

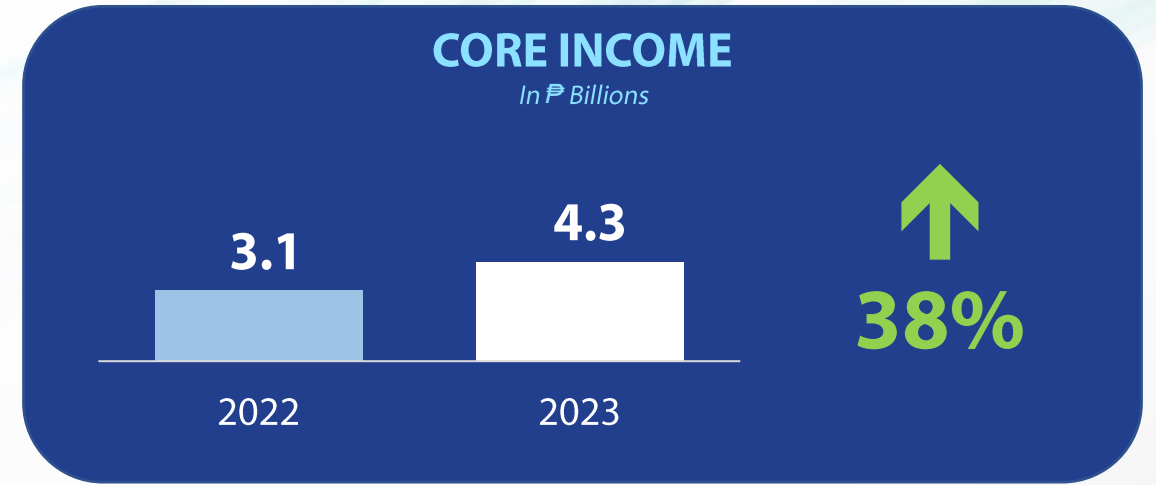
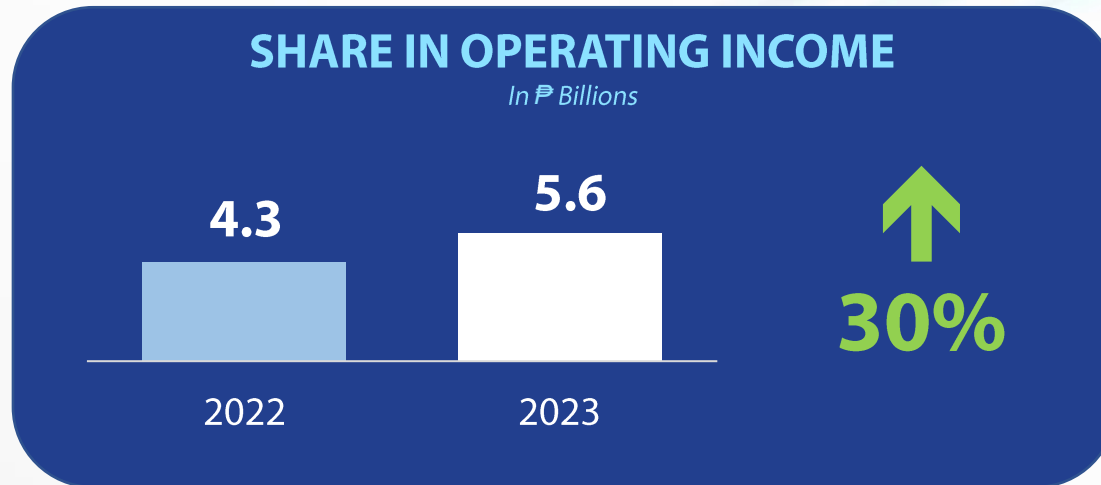
Illustrative Capital Expenditure and Cash Flows

# FINANCIAL HIGHLIGHTS – 1Q 2023 vs 1Q 2022

## AGGREGATE GROUPWIDE



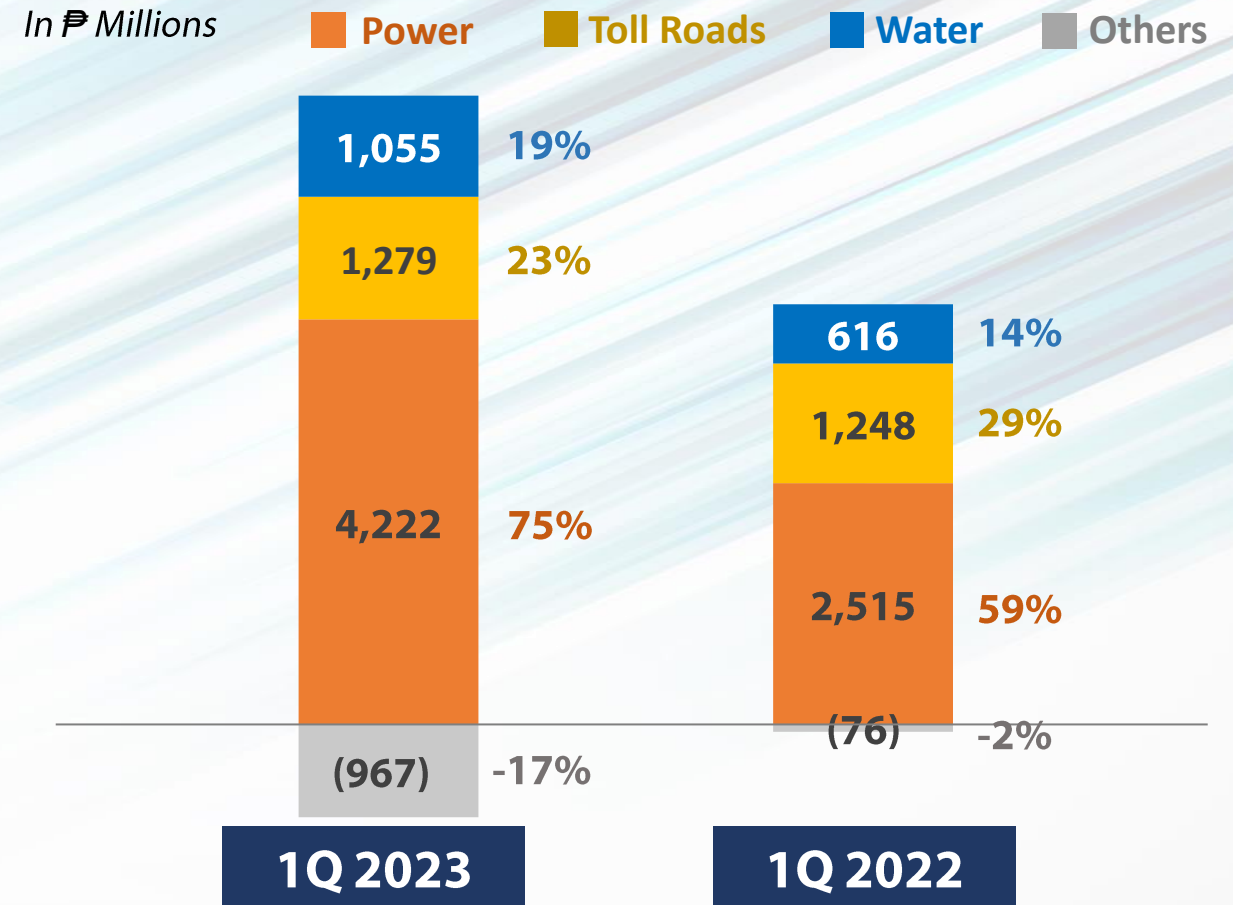
## MPIC SHARE



# CONSOLIDATED INCOME

In ₱ Millions	1Q 2023	1Q 2022		%
<b>POWER</b>	<b>4,222</b>	2,515	↑	68%
<b>TOLL ROADS</b>	<b>1,279</b>	1,248	↑	2%
<b>WATER</b>	<b>1,055</b>	616	↑	71%
<b>LIGHT RAIL</b>	<b>(50)</b>	(86)	↓	42%
<b>HEALTH</b>	<b>94</b>	35	↑	>100%
<b>OTHERS</b>	<b>(1,011)</b>	(25)	↑	>100%
<b>SHARE IN OPERATING CORE INCOME</b>	<b>5,589</b>	<b>4,303</b>	↑	30%
Head Office	(425)	(305)	↑	39%
Interest – Net	(842)	(866)	↓	3%
<b>CORE INCOME</b>	<b>4,322</b>	<b>3,132</b>	↑	38%
Non-recurring Items	<b>675</b>	2,546	↓	73%
<b>REPORTED INCOME</b>	<b>4,997</b>	<b>5,678</b>	↓	12%

## EARNINGS CONTRIBUTION MIX



# STAND-ALONE PERFORMANCE OF OPERATING COMPANIES

# MERALCO 1Q 2023 HIGHLIGHTS



In ₱ Millions      1Q 2023      1Q 2022      %

## FINANCIAL HIGHLIGHTS

Revenues	105,642	85,905	23	↑
Core EBITDA	16,140	12,170	33	↑
Core Income	9,047	6,442	40	↑
Reported Income	8,071	6,381	26	↑
Capital Expenditure	5,113	5,971	14	↓

## KEY PERFORMANCE INDICATORS

Total Energy Sales (In GWh)	11,287	11,069	2	↑
Residential	3,701	3,808	3	↓
Commercial	4,213	3,781	11	↑
Industrial	3,336	3,443	3	↓
Streetlights	37	37	0	→

## TOTAL ENERGY SALES



## KEY DRIVERS OF PERFORMANCE

- Total Revenues rose 23% to a record high ₱105.6 billion, reflecting higher pass-through generation charges, higher generation revenues and growth in volumes sold
- Core Net Income increased 40% to ₱9.0 billion, driven by the significant growth in contribution from the power generation business
  - Meralco PowerGen Corporation contributed ₱3.7 billion, tripling from ₱1.2 billion a year earlier, primarily driven by the contribution of Singapore-based PacificLight Power Pte. Ltd. MGen delivered 3,648 GWh in volumes, up 14% from last year
- Reported Net Income improved 26% to ₱8.1 billion

# METRO PACIFIC TOLLWAYS 1Q 2023 HIGHLIGHTS

In ₱ Millions

1Q 2023

1Q 2022

%



## FINANCIAL HIGHLIGHTS

Revenues	6,390	4,850	32	↑
Core EBITDA	4,448	3,454	28	↑
Core Income	1,287	1,254	3	↑
Reported Income	1,248	1,239	1	↑
Capital Expenditure	2,959	5,611	47	↓



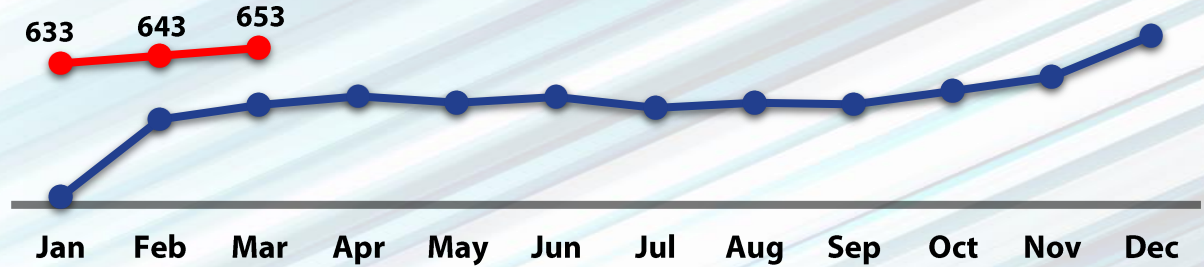
## KEY PERFORMANCE INDICATORS

Average Daily Traffic	1,203,576	850,025	42	↑
<b>PHILIPPINES</b>	<b>643,034</b>	532,446	21	↑
NLEX	333,754	287,620	16	↑
SCTEX	80,261	65,154	23	↑
CAVITEX	182,742	153,259	19	↑
CALAX	34,391	26,413	30	↑
CCLEX	11,886	-	100	↑
<b>INTERNATIONAL</b>	<b>560,542</b>	317,579	77	↑
PT Nusantara (Indonesia)	481,989	246,956	95	↑
CII B&R (Vietnam)	78,552	70,623	11	↑

## DOMESTIC AVERAGE DAILY TRAFFIC

In Thousands

— 2023 — 2022



## KEY DRIVERS OF PERFORMANCE

- Toll Revenues grew 32% due to:

### Philippines

- Average daily vehicle entries rose 21% to 643,034 from 532,446
- Toll rate adjustments for SCTEX in June 2022; NLEX and CAVITEX in May 2022
- Start of toll collection for CAVITEX C5 Southlink 3A-2 in November 2022 and CCLEX in August 2022

### International toll roads

- Vietnam – Average daily vehicle entries increased 11% to 78,552
- Indonesia – Average daily vehicle entries climbed 95% to 481,989, which included 196,485 vehicles from the newly acquired Jakarta-Cikampek Elevated (“Japex”) toll road
- Slower growth in Core Income of 3% was due to the higher concession amortization on newly opened roads and financing cost on the Japex acquisition

# MAYNILAD WATER SERVICES 1Q 2023 HIGHLIGHTS

In ₱ Millions

1Q 2023

1Q 2022

%



## FINANCIAL HIGHLIGHTS

Revenues	6,223	5,292	18	↑
Core EBITDA	4,001	3,561	12	↑
Core Income	2,122	1,354	57	↑
Reported Income	2,106	1,357	55	↑
Capital Expenditure	4,162	3,422	22	↑



## KEY PERFORMANCE INDICATORS

Total Billed Volume (In MCM)	127.6	124.0	3	↑
Residential	94.6	94.8	0	→
Semi-business	9.4	8.5	10	↑
Commercial	17.2	14.8	16	↑
Industrial	6.4	5.9	8	↑

## BILLED VOLUME



## KEY DRIVERS OF PERFORMANCE

- Revenues rose 18% to ₱6.2 billion reflecting 3% growth in billed volume and higher effective tariffs
  - Demand from semi-business and commercial sectors rise double-digits at 10% and 16%, respectively
- Core Income up by 57% to ₱2.1 billion due to lower amortization resulting from the extension of the concession period
- Capital expenditure amounted to ₱4.2 billion, up 22% from last year, as Maynilad continues to deliver on its obligations under the approved business plan

# OTHER BUSINESSES



LIGHT RAIL  
MANILA  
CORPORATION



## LIGHT RAIL MANILA CORPORATION

In ₱ Millions	1Q 2023	1Q 2022	%	
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### FINANCIAL HIGHLIGHTS

Revenues	<b>595</b>	344	73	↑
Core EBITDA	<b>61</b>	(15)	507	↑
Core Income	<b>(83)</b>	(178)	53	↓
Reported Income	<b>(83)</b>	(179)	54	↓
Capital Expenditure	<b>685</b>	652	5	↑



### KEY PERFORMANCE INDICATORS

Average Daily Ridership (In Thousands)	<b>303</b>	160	89	↑
Capacity Utilization (In %)	<b>64</b>	37	72	↑

## KEY DRIVERS OF PERFORMANCE

- Revenues increased as average daily ridership rose 89%
- Average daily ridership still below 35% vs. pre-pandemic level
- Core loss driven by amortization of concession assets and borrowing costs on existing line

## METRO PACIFIC HEALTH

In ₱ Millions	1Q 2023	1Q 2022	%	
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### FINANCIAL HIGHLIGHTS

Revenues	<b>5,561</b>	4,605	21	↑
Core EBITDA	<b>1,323</b>	909	46	↑
Core Income	<b>469</b>	177	165	↑
Reported Income	<b>469</b>	177	165	↑
Capital Expenditure	<b>470</b>	540	13	↓



### KEY PERFORMANCE INDICATORS

Total Patient Census (In Thousands)	<b>1,022</b>	904	13	↑
Inpatient	<b>37</b>	24	57	↑
Outpatient	<b>985</b>	880	12	↑

## KEY DRIVERS OF PERFORMANCE

- Core income was higher mainly driven by the increase in patient census



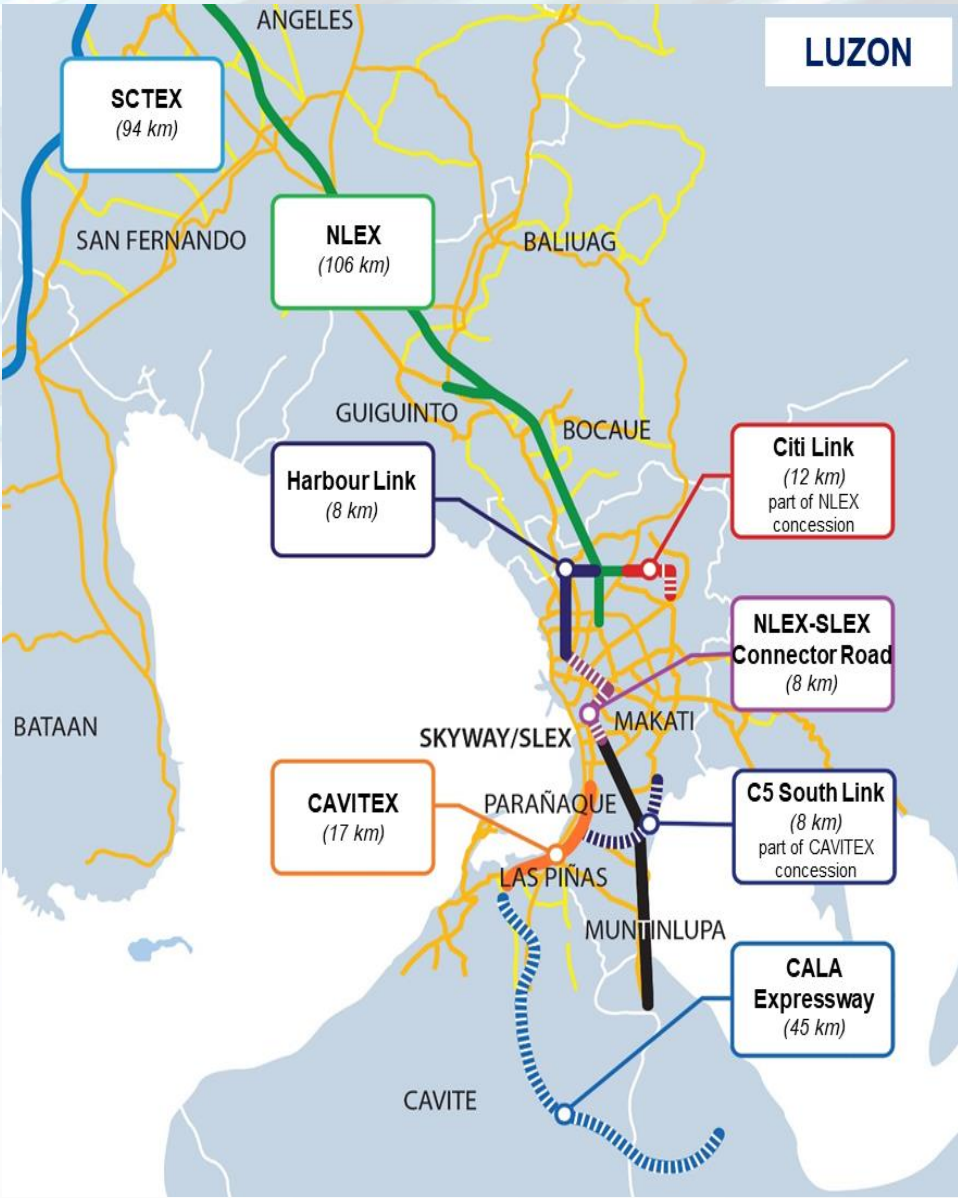
# **GROWTH, EXPANSION, AND RECENT DEVELOPMENTS**

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# COMPLETION OF TOLL ROAD NETWORK

Toll Road Projects	Length (In Km)	Construction Cost <sup>(a)</sup> (In Billions)	Target Completion
<b>Expansions to existing roads</b>			
CAVITEX – CALAX Link	1.2	₱2.4	2024
CAVITEX – C5 South Link	7.8	16.4	2024
Cavite-Laguna Expressway	44.6	29.5	2024
<b>Stand-alone road projects</b>			
NLEX-SLEX Connector Road	8.0	20.2	2023
<b>TOTAL</b>	<b>61.6</b>	<b>₱68.5</b>	

(a) Inclusive of FOE, Security and Other Costs and exclusive of Concession Fees



# MAYNILAD BEGINS EXTENSIVE WASTEWATER MANAGEMENT PROGRAM

**Maynilad plans to spend approximately ₱178 billion from 2023 until 2046 for its wastewater management program, which aims to expand sewer coverage and manage pollution loading into bodies of water**

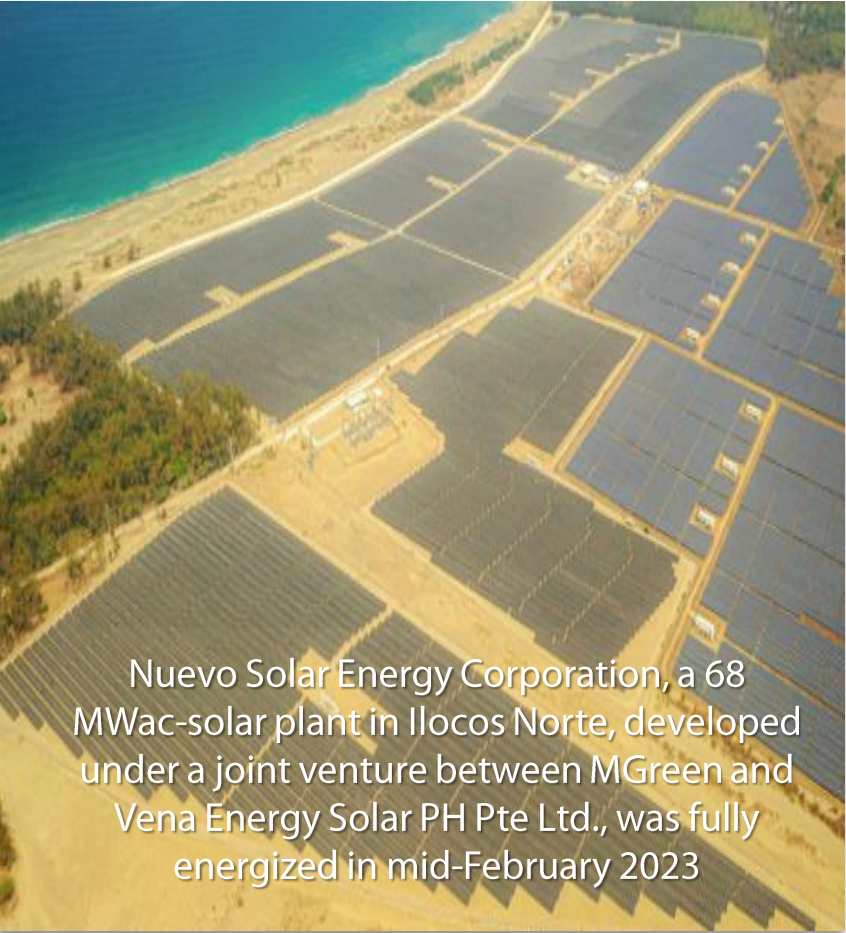


## KEY PRIORITIES

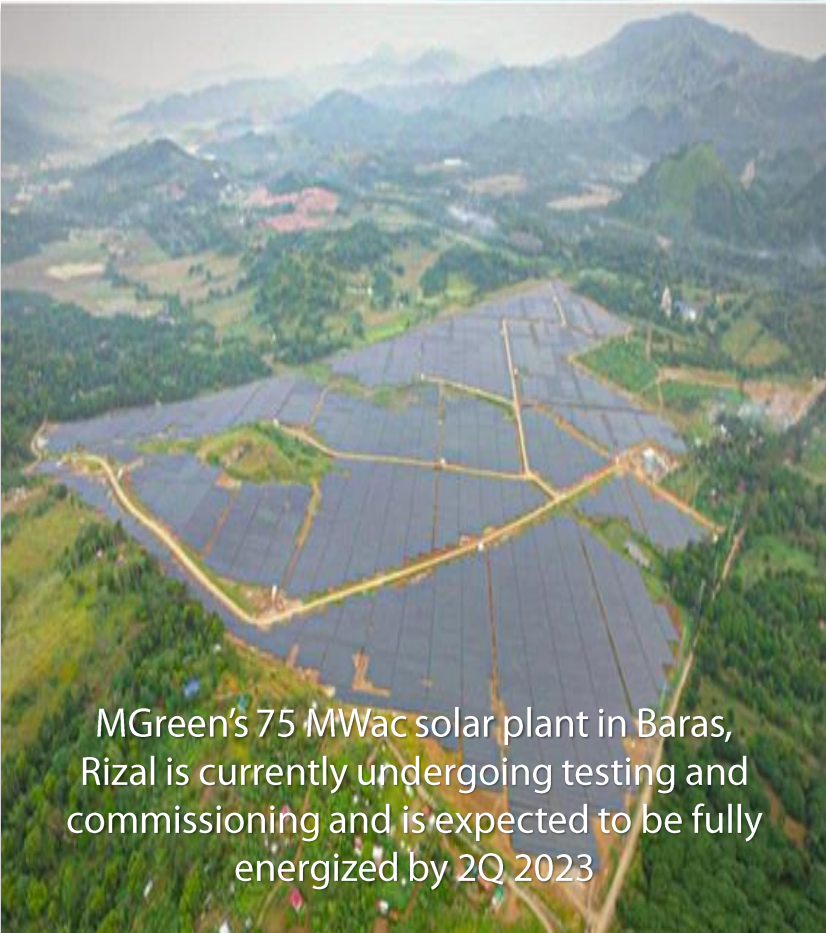
- ✓ Construction of 18 new Sewage Treatment Plants (STP) in different areas within its concession
- ✓ Installation of approximately 360 kilometers of new sewer lines that will catch and convey used water from households to STPs
- ✓ Upgrade of 17 existing wastewater facilities to meet the revised effluent standards (DAO 2021-19) of the Department of Environment and Natural Resources

# SUSTAINABILITY AT MPIC

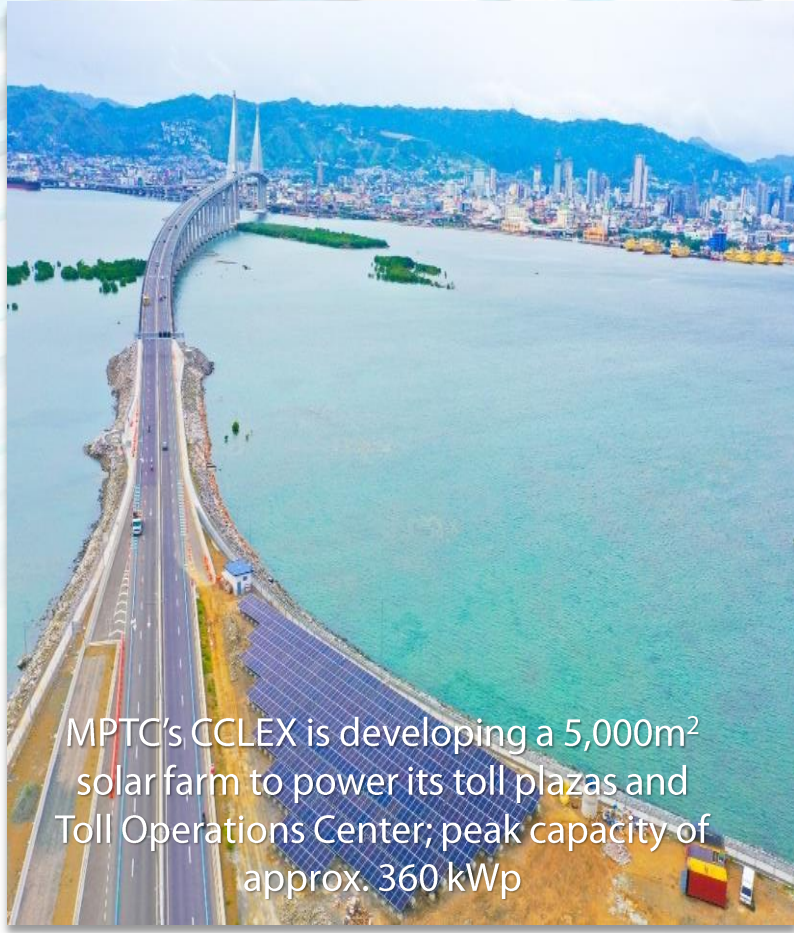
# INTEGRATING SUSTAINABILITY WITH BUSINESS STRATEGY



Nuevo Solar Energy Corporation, a 68 MWac-solar plant in Ilocos Norte, developed under a joint venture between MGreen and Vena Energy Solar PH Pte Ltd., was fully energized in mid-February 2023



MGreen's 75 MWac solar plant in Baras, Rizal is currently undergoing testing and commissioning and is expected to be fully energized by 2Q 2023



MPTC's CCLEX is developing a 5,000m<sup>2</sup> solar farm to power its toll plazas and Toll Operations Center; peak capacity of approx. 360 kWp

# INTEGRATING SUSTAINABILITY WITH BUSINESS STRATEGY



**MPIC has invested ₱2.0B to acquire 1.6 billion common shares of SP New Energy Corporation (SPNEC) from its parent Solar Philippines Power Project Holdings, Inc. (SPH)**



- SPNEC is an integrated developer, owner, and operator of solar power projects listed in the Philippine Stock Exchange. SPNEC and SPH are in the process of completing an asset-for-share swap where SPH's pipeline of over 8-GW of projects will be consolidated under SPNEC
- MPIC's investment into SPNEC is guided by the vision of the Department of Energy (DOE) that 35% of the country's energy come from renewable energy by 2030

# INVESTING IN ENVIRONMENTAL PROTECTION PROGRAMS



**MPIC broke ground on the Gabay Kalikasan Park in partnership with DENR-BMB, DENR-NCR, and the LGU of Quezon City. The project aims to pilot the Adopt-a-City approach in implementing the Urban Biodiversity program**



**MPIF continues to protect wetlands of national importance through UNESCO World Heritage Site Tubbataha Reefs Natural Park and the mangroves of Del Carmen, Island of Siargao, Surigao del Norte**

# ALIGNING WITH GLOBAL BEST PRACTICES ON SUSTAINABILITY



- MPIC bagged the Gold Award for the First Time Category at the 8<sup>th</sup> Asia Integrated Reporting Awards (AIRA) for its 2021 Integrated Report
- The winning reports are selected based on a rigorous assessment, where an independent judging panel determines the finalists and winners and conducts a comprehensive due diligence process
- AIRA is organized by CSRWorks International, a reputed sustainability services leader in Asia

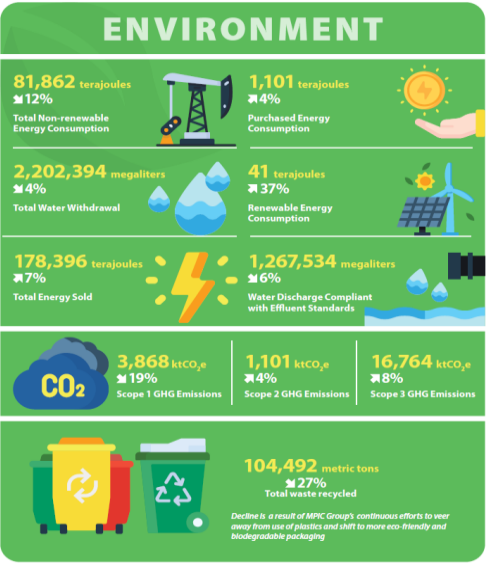
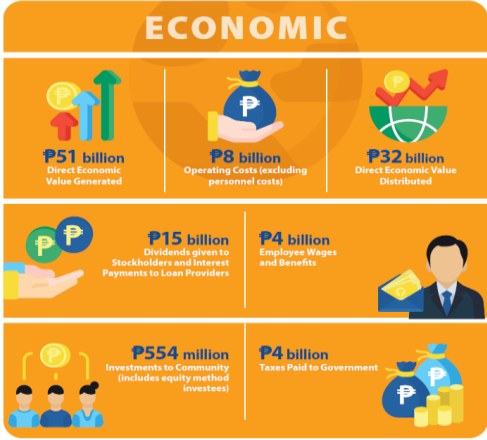


# ALIGNING WITH GLOBAL BEST PRACTICES ON SUSTAINABILITY

## 2022 EESG Highlights\*

GRI 2-7, 201-1, 203-1, 205-3, 302-1, 303-3, 305-1, 305-2, 306-1, 306-2, 306-3, 307-1, 401-1, 403-B, 404-1, 405-2

\*Represents aggregate data for featured companies only



“By thoughtfully incorporating sustainability in all aspects of our business and investments, we have emerged stronger from the challenges of 2022 and beyond.”



We continue to elevate our corporate reporting disclosures to offer a more concise presentation to demonstrate our thought leadership, value creation and stakeholder needs

# OTHER MATTERS

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# TENDER OFFER NOTICE

On April 26, 2023, MPIC received a Tender Offer Notice from a consortium consisting of Metro Pacific Holdings, Inc., GT Capital Holdings, Inc., Mit-Pacific Infrastructure Holdings, Inc. and MIG Holdings Incorporated which states that they intend to make a tender offer for common shares of MPIC with a view to taking MPIC private through a voluntary delisting process.



**Tender offer price:** ₱4.63 (22% over the 12-month volume weighted average price); determined through third-party valuation

**Target offer schedule:** Late May 2023 to June 2023

**Target shares:** Maximum of 10.5 billion shares

# APPENDIX

The background image shows a vibrant city skyline at night, with numerous skyscrapers and buildings illuminated with lights. Several construction cranes are visible, indicating ongoing development. In the foreground, two construction workers wearing orange hard hats and high-visibility vests are seen from behind, looking out over the city. One worker is pointing towards the skyline. The overall scene conveys a sense of urban growth and infrastructure development.

# CONSOLIDATED INCOME STATEMENT

## CORE INCOME INCREASED 38% TO ₱4.3 BILLION

In ₱ Millions	1Q 2023	1Q 2022	%
<b>POWER</b>	<b>4,222</b>	2,515	↑ 68%
<b>TOLL ROADS</b>	<b>1,279</b>	1,248	↑ 2%
<b>WATER</b>	<b>1,055</b>	616	↑ 71%
<b>LIGHT RAIL</b>	<b>(50)</b>	(86)	↓ 42%
<b>HEALTH</b>	<b>94</b>	35	↑ >100%
<b>OTHERS</b>	<b>(1,011)</b>	(25)	↑ >100%
<b>SHARE IN OPERATING CORE INCOME</b>	<b>5,589</b>	<b>4,303</b>	↑ 30%
Head Office	<b>(425)</b>	(305)	↑ 39%
Interest – Net	<b>(842)</b>	(866)	↓ 3%
<b>CORE INCOME</b>	<b>4,322</b>	<b>3,132</b>	↑ 38%
Non-recurring Items	<b>675</b>	2,546	↓ 73%
<b>REPORTED INCOME</b>	<b>4,997</b>	<b>5,678</b>	↓ 12%

### KEY DRIVERS OF PERFORMANCE

- Core income for 1Q 2023 increased by 38% due to:
  - Higher share in Meralco driven by better-than-expected recovery of the power generation business and higher volume growth in the DU
  - Higher toll contribution with higher traffic, toll rate increases, and start of toll collection on new toll roads
  - Higher water contribution from Maynilad's approved tariff increase and lower amortization resulting from the extension of the concession period
  - Lower rail core losses due to higher ridership and capacity utilization
  - Lower HO interest due to the strategic rerating and refinancing of expensive debt facilities over the past two years
- Reported income declined as 1Q 2022 included gain on acquisition of Landco (₱2.5 billion)

# SHARE IN OPERATING INCOME



*In Millions*

POWER	1Q 2023	1Q 2022	%	
Meralco <sup>(a)</sup> (47.5%)	₱4,294	₱2,557	↑	68%
Beacon/FV and accounting adjustments	(72)	(42)	↑	71%
	₱4,222	₱2,515	↑	68%

TOLL ROADS	1Q 2023	1Q 2022	%	
MPTC (99.9%)	₱1,286	₱1,253	↑	3%
FV and consolidation adjustments	(7)	(5)	↑	40%
	₱1,279	₱1,248	↑	2%

WATER	1Q 2023	1Q 2022	%	
Maynilad (52.8%)	₱1,121	₱715	↑	57%
MetroPac Water (100%)	(66)	(99)	↓	34%
	₱1,055	₱616	↑	71%

LIGHT RAIL	1Q 2023	1Q 2022	%	
LRMC (35.8%)	(₱30)	(₱64)	↓	53%
Consolidation adjustments	(20)	(22)	↓	9%
	(₱50)	(₱86)	↓	42%

HEALTH, OTHERS	1Q 2023	1Q 2022	%	
Health	₱94	₱35	↑	>100%
Others	(1,011)	(25)	↑	>100%
	(₱917)	₱10	↑	>100%

# CONDENSED STATEMENTS OF INCOME



<i>In Millions of Pesos</i>	<b>1Q 2023</b>
Electricity	<b>102,356</b>
Non-Electricity	<b>3,286</b>
<b>Gross revenues</b>	<b>105,642</b>
Purchased power	<b>(78,619)</b>
Operating expenses	<b>(19,764)</b>
Other income	<b>3,721</b>
Provision for income tax	<b>(1,799)</b>
Non-controlling interest	<b>(134)</b>
<b>Core income</b>	<b>9,047</b>
Non-core income	<b>(976)</b>
<b>Reported Net Income</b>	<b>8,071</b>
<b>Core EBITDA Computation:</b>	
Core income	<b>9,047</b>
Depreciation and amortization	<b>4,054</b>
Interest expense - net	<b>459</b>
Provision for income tax	<b>1,799</b>
Others	<b>781</b>
<b>Core EBITDA</b>	<b>16,140</b>



<i>In Millions of Pesos</i>	<b>1Q 2023</b>
Net toll revenues	<b>6,390</b>
Cost of services	<b>(2,594)</b>
<b>Gross profit</b>	<b>3,796</b>
Operating expenses	<b>(629)</b>
Other income and expense - net	<b>615</b>
Share in earnings of associates	<b>(66)</b>
Interest expense - net	<b>(1,325)</b>
Provision for income tax	<b>(592)</b>
Non-controlling interest	<b>(512)</b>
<b>Core income</b>	<b>1,287</b>
Non-core income (expense)	<b>(38)</b>
<b>Reported Net Income</b>	<b>1,248</b>
<b>Core EBITDA Computation:</b>	
Core income	<b>1,287</b>
Depreciation, amortization and others	<b>666</b>
Interest expense - net	<b>1,325</b>
Provision for income tax	<b>592</b>
Non-controlling interest	<b>512</b>
Others	<b>66</b>
<b>Core EBITDA</b>	<b>4,448</b>

# CONDENSED STATEMENTS OF INCOME

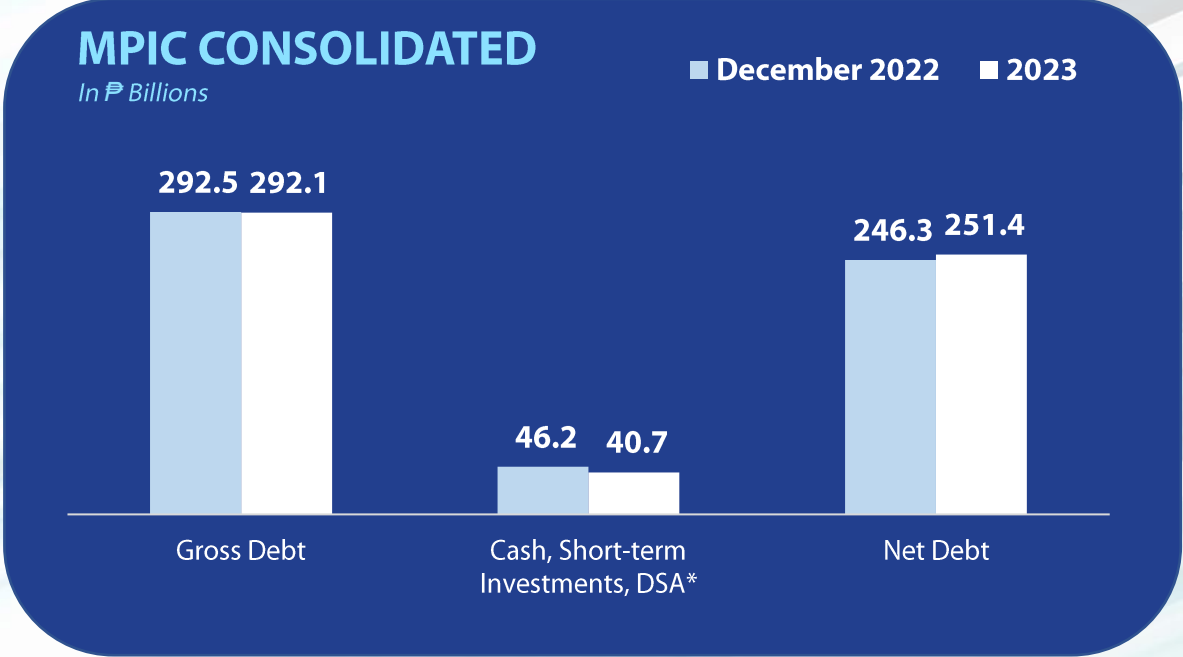
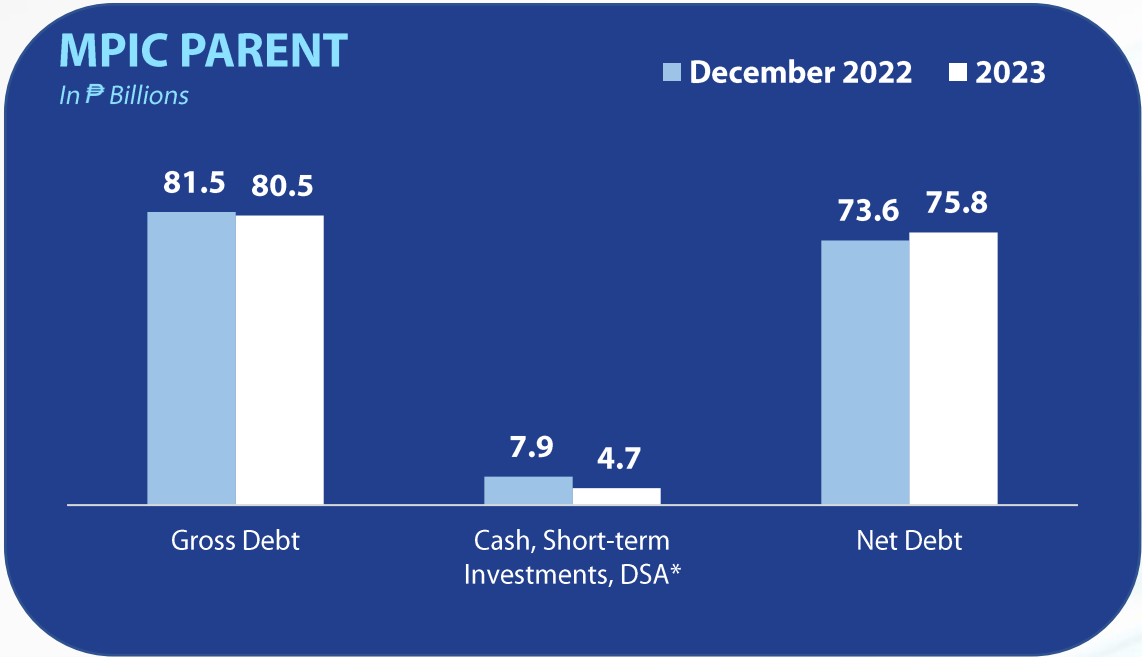


<i>In Millions of Pesos</i>	<b>1Q 2023</b>
Revenues	<b>6,223</b>
Cost of services	<b>(1,951)</b>
<b>Gross profit</b>	<b>4,272</b>
Operating expenses	<b>(1,016)</b>
Other income and expense - net	<b>5</b>
Interest expense - net	<b>(503)</b>
Provision for income tax	<b>(636)</b>
<b>Core income</b>	<b>2,122</b>
None-core expenses	<b>(16)</b>
<b>Reported Net Income</b>	<b>2,106</b>
<b>Core EBITDA Computation:</b>	
Core income	<b>2,122</b>
Depreciation and amortization	<b>740</b>
Interest expense - net	<b>503</b>
Provision for income tax	<b>636</b>
<b>Core EBITDA</b>	<b>4,001</b>



<i>In Millions of Pesos</i>	<b>1Q 2023</b>
Rail revenue	<b>595</b>
Cost of services	<b>(458)</b>
<b>Gross profit</b>	<b>137</b>
Operating expenses	<b>(169)</b>
Other income and expense - net	<b>29</b>
Interest income (expense) - net	<b>(93)</b>
Provision for income tax	<b>13</b>
<b>Core income (loss)</b>	<b>(83)</b>
Non-core income (expense)	<b>-</b>
<b>Reported Net Income (loss)</b>	<b>(83)</b>
<b>Core EBITDA Computation:</b>	
Core income (loss)	<b>(83)</b>
Depreciation and amortization	<b>64</b>
Interest expense (income) - net	<b>93</b>
Provision for income tax	<b>(13)</b>
<b>Core EBITDA</b>	<b>61</b>

# DEBT PROFILE



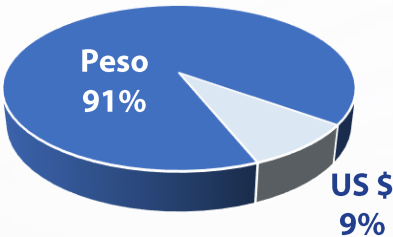
**MPIC maintains low cost of capital in a rising interest rate environment**

#### Average Interest Rate



**5.03%**

#### Currency Exposure

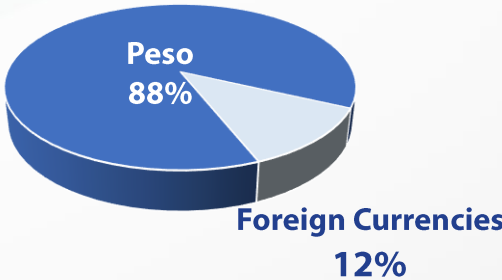


#### Average Interest Rate



**5.97%**

#### Currency Exposure



\*Debt Service Account

# BALANCE SHEET HIGHLIGHTS

*In ₱ Billions* **1Q23 vs. FY22**

## CONSOLIDATED

### ASSETS

Cash and short-term investments	<b>₱38.0</b>	–	<b>10%</b>
Receivables and other assets	<b>79.0</b>	+	<b>8%</b>
Investments and advances	<b>194.7</b>	–	<b>1%</b>
Service concession assets	<b>339.3</b>	+	<b>2%</b>

### LIABILITIES AND EQUITY

Accounts payable and others	<b>₱81.0</b>	+	<b>6%</b>
Service concession fees payable	<b>29.8</b>	–	
Long-term debt	<b>292.1</b>	–	
Non controlling interest	<b>44.8</b>	–	
Equity Attributable to Parent Company	<b>203.3</b>	+	<b>2%</b>

## MPIC PARENT

### ASSETS

Cash and short-term investments	<b>₱4.7</b>	–	<b>37%</b>
Investments and advances	<b>219.8</b>	+	<b>1%</b>
Other assets	<b>10.5</b>	+	<b>65%</b>

### LIABILITIES AND EQUITY

Accounts payable & others	<b>₱5.5</b>	+	<b>60%</b>
Long-term debt	<b>80.5</b>	–	<b>1%</b>
Deferred tax and provisions	<b>9.4</b>	+	<b>1%</b>
Equity	<b>139.5</b>	+	<b>1%</b>

# ILLUSTRATIVE CAPITAL EXPENDITURE AND CASH FLOWS

## CAPITAL EXPENDITURE

<i>In Billions</i>	2023		2022	
	Stand-alone	MPIC Share	Stand-alone	MPIC Share
<b>TOLL ROADS</b>	₱27.2	₱-	₱20.1	₱-(c)
<b>POWER</b>	64.9	0.9(a)	42.7	8.0(d)
<b>WATER</b>	29.0	0.6	15.7	0.3
<b>LIGHT RAIL</b>	2.8	1.3	2.7	0.9
<b>HEALTH</b>	4.6	-	2.5	-
<b>OIL STORAGE</b>	0.9	-	0.4	-
<b>OTHERS</b>	4.1	17.5(b)	1.0	4.4
<b>SUB-TOTAL</b>	133.6	20.3	85.1	13.6
<b>SHARE BUY-BACK</b>	-	-	-	5.0
<b>TOTAL</b>	<b>₱133.6</b>	<b>₱20.3</b>	<b>₱85.1</b>	<b>₱18.6</b>

## CASH FLOW INDICATORS

<i>In Billions</i>	2023	2022
<b>Beginning cash</b>	₱7.9	₱21.3
<b>Proceeds from new borrowings<sup>(e)</sup></b>	16.4	1.6
<b>Dividend income</b>	14.7	12.1
<b>Net interest overhead and fees</b>	(6.7)	(5.2)
<b>Dividend commitment</b>	(3.3)	(3.3)
<b>Allocation for investments<sup>(f)</sup></b>	(20.3)	(18.6)
<b>Free Cash Flow</b>	4.7	3.6

### NOTES:

(a) Includes Metpower expansion projects

(b) Includes potential investments in various sectors

(c) Funded from proceeds of toll road assets sale

(d) Includes acquisition of additional 2.0% interest at ₱344 per share bringing MPIC's effective ownership in Meralco to 47.5%

(e) Net of loan repayments

(f) Includes ₱5.0 billion MPIC share buyback for 2022

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## ABOUT MPIC

**Metro Pacific Investments Corporation (PSE:MPI)** is a Philippine-based, publicly listed investment and management company, focused on infrastructure, with holdings in Manila Electric Company, Maynilad Water Services, Inc., MetroPac Water Investments Corporation, Metro Pacific Tollways Corporation, Metro Pacific Hospital Holdings Inc., Light Rail Manila Corporation.

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# METRO PACIFIC

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## INVESTMENTS

