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1H FY26 Results Presentation

20 February 2026



Agenda



Michael Juniper
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OVERVIEW**

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**SUPPLEMENTARY
INFORMATION**

Acknowledgement of Country



DigiCo Infrastructure REIT acknowledges the Traditional Custodians of Country throughout Australia and celebrates their diverse culture and connections to land, sea and community. We pay our respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples.

Journey of Creation

Billy Reynolds (2024)

© the artist courtesy Billy Reynolds

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Result and Strategy Overview

CEO observations & early actions

Strong foundations are in place with a clear opportunity to unlock value and focus on disciplined growth

Strengths

STRENGTH OF UNDERLYING PLATFORM

- **High-quality, strategically located assets** with significant connectivity
- **Diversified customer base** providing escalating recurring revenue
- Strategic value and location of **Australian footprint underappreciated**

EMBEDDED GROWTH WITHIN PORTFOLIO

- **SYD1 88MW expansion fully approved** with SSDA and power secured, and first 20MW project nearing completion – targeting 15% incremental yield on cost
- **Multiple additional brownfield expansion opportunities** within existing portfolio, enabling capital efficient growth
- ADL1 potential expansion upsized from 8MW to 15MW (**10-12% yield on cost target**)

STRUCTURAL SECTOR TAILWINDS

- Data centres increasingly recognised as **core infrastructure for the future**
- AI driven demand accelerating requirements for **high density, low latency, energy secure capacity**
- Australia increasingly favoured for digital infrastructure deployments given **regulatory certainty, clarity and power/land availability**

Focus areas

OPERATIONAL EXCELLENCE

- Organisational redesign & cost out expected to deliver **operating expense savings of ~\$5m per annum**
- Operating model set to **support growth without proportional cost increases**
- Selective hires made to bolster specialist engineering and delivery capability

CAPITAL ALLOCATION AND BALANCE SHEET

- Opportunistic asset partnering and recycling of US yield assets and partnering of Australian portfolio to strengthen the balance sheet
- Capital recycled to be primarily deployed into **SYD1** to support delivery of the 88MW Project alongside other capital management measures

FUTURE PIPELINE AND GROWTH VISIBILITY

- Securing strategically located **greenfield sites** with visibility to end customer, power and planning approvals
- Opportunity to partner with **HMC Energy Transition platform** is a competitive advantage¹

Strategic update

Driving more targeted capital allocation

Board and Management focused on strategic initiatives to close the discount to Net Asset Value ("NAV")

1

SYD1 is a compelling growth opportunity

- Existing capacity now **100% contracted**
 - Demand from AI, Hyperscale & Enterprise customers materially exceeding IPO expectations and validating the asset's strategic value
- 88MW Project expected to deliver **15% yield on cost** and **~\$1.50 of additional NAV per security¹**
- Timing accelerated to achieve delivery of 88MW **over the next 3 years**
 - Current (fully contracted) 20MW expansion targeting final commissioning and handover in Q2 CY2026
 - Full 88MW expansion on track to be delivered in **progressive stages over 2027, 2028 and 2029**
 - Materially de-risked with SSDA approval, power secured, design works well progressed and head contractor expected to be appointed by Q3 CY2026 for the full 88MW project

2

Funding strategy

- Existing **~\$650m of liquidity** to be focused on delivering the SYD1 88MW Project, having regard to return hurdles
- Engagement with potential **Australian capital partners** progressing in lead up to appointing head contractor on the 88MW project. Advisors appointed with multiple conversations underway
- Will opportunistically look to partner and recycle capital from **US assets** into higher returning projects

Any capital partnering or recycling will be conducted at compelling value for securityholders while maintaining a sustainable level of gearing

1H FY26 Contract Wins

22MW

+95% growth in Australian business vs pcp¹

1H FY26 Distribution

6.0 cps

~5.3% annualised yield on current security price³

Underlying EBITDA

\$57m

+15% on pcp¹

Run rate EBITDA

\$180m

July 2026²

Liquidity

\$658m

Cash and undrawn debt

Gearing

35.8%

Low-end of target range

1H FY26 achievements

<p>1</p> <p>Substantial contract wins</p>	<ul style="list-style-type: none"> ✓ 22MW contract wins across Australian business including 2MW in QLD, resulting in 95% growth in the Australian business from June 2025 ✓ 85MW Contracted IT Capacity, representing 31% growth across the Group from June 2025 ✓ Australian qualified demand pipeline of over 200MW+
<p>2</p> <p>Development outcomes</p>	<ul style="list-style-type: none"> ✓ SYD1 acceleration on track with 20MW project targeting final commissioning and handover in Q2 CY2026 ✓ BNE2 fully contracted with incremental expansion underway to support recent 2MW QLD wins ✓ ADL1 potential expansion increased to 15MW, subject to cornerstone customer ✓ CHI1 on track for final completion by Q2 CY2026
<p>3</p> <p>Strong balance sheet</p>	<ul style="list-style-type: none"> ✓ Well capitalised with total available liquidity of \$658m across cash and undrawn debt lines ✓ Sufficient existing capacity available to fund near term growth priorities ✓ Focus on capital partnering and recycling opportunities to fund existing development pipeline
<p>1</p> <p>Operating Structure and Management team</p>	<ul style="list-style-type: none"> ✓ Operating model optimisation and team realignment delivering improved efficiency and expected cost synergies of ~\$5m per annum ✓ Operating model set to support growth without proportional cost increases with selective hires made to bolster specialist engineering and delivery capability

DigiCo is capturing the surge in data centre demand

Australia Highlights

41MW

Contracted capacity

95%+

Growth vs pcp¹

100%

of existing SYD1 capacity contracted

200MW+

Demand pipeline

"AI is the largest infrastructure buildout in human history...with a roughly 7 – 8 year investment cycle ahead"

Jensen Huang, NVIDIA CEO, 2026

"We will roughly double our total data centre footprint over the next two years"

Satya Nadella, Microsoft CEO, Q1 2026 earnings call

"We're now double the power capacity that AWS was in 2022, and we're on track to double again by 2027"

Andy Jassy, AWS CEO, Q3 2025 earnings call

"Meta is planning to build tens of gigawatts this decade, and hundreds of gigawatts or more over time"

Mark Zuckerberg, CEO of Meta, Threads January 2026

"I would like OpenAI to be able to add 1 gigawatt of compute every week"

Sam Altman, October 2025





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The background of the slide features a complex, abstract design of glowing circuit boards. The circuit lines are rendered in various colors including blue, orange, and yellow, creating a sense of depth and motion. The overall aesthetic is futuristic and high-tech.

SYD1 Development Update

SYD1 20MW delivery update is on track for delivery in Q2 CY2026

- ✓ Previous 9MW project has been upsized to 20MW to support recent customer wins, highlighting the flexibility of the SYD1 design to deliver high-density capacity
- ✓ Construction on track for delivery in Q2 CY2026
- ✓ Embedded supply chain, contractor and equipment pathways established and will enable accelerated delivery of remaining capacity for the 88MW Project
- ✓ Demonstrates the ability of SYD1 to convert power into contracted, high-return capacity

Underwritten returns above 15% target yield on cost



SYD1 development update

The 88MW Project design has been optimised to deliver flexible 5 – 10MW+ deployments to meet customer requirements



KEY DEVELOPMENT MILESTONES

December 2025	SSDA Approval for full 88MW Project received
Q2 CY 2026	20MW Project targeting final commissioning and handover
Q2 CY2026	88MW Project design and Early Contractor Involvement ("ECI") completed
Q3 CY2026	Head contractor appointed for full 88MW project
CY2027	Incremental 20MW of capacity targeting delivery in 2027
CY2028	Additional tranche of capacity targeting delivery in 2028
FY2029	Completion of SYD1 88MW Project



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Financial Results



Earnings summary

1H FY26 Underlying EBITDA of \$57m

\$m, unless otherwise stated	1H FY26 ⁵	2H FY25	Commentary
Colocation & rental revenue ¹	80.8	68.1	
Interconnection revenue	14.9	17.5	
Power and other revenue	12.6	11.5	
Total revenue	108.3	97.1	
			▪ Revenue \$108m, up 11.5% on 2H FY25
Data centre and asset management expenses	(24.2)	(20.8)	
Power costs	(10.7)	(11.1)	
Management fees	(11.1)	(10.8)	
Corporate costs and other ¹	(5.1)	(4.8)	
Total operating costs	(51.1)	(47.5)	
			▪ Underlying EBITDA of \$57m, up 15% on 2H FY25
Underlying EBITDA²	57.2	49.6	
			▪ SYD1 contribution expected to materially increase 2H FY26 EBITDA by ~20%
Interest expense	(32.1)	(31.8)	
Interest revenue	7.2	8.4	
Scrip paid management fees	11.1	10.8	
FFO³	43.4	37.0	
			▪ CHI1 pre-completion rent received of \$18.5m included in Underlying EBITDA and pre-completion interest payments of \$12.9m included in Adjusted FFO (physical handover progressively scheduled for March-June 2026)
CHI1 pre-completion interest payments	(12.9)	-	
Adjusted FFO⁴	30.5	37.0	
			▪ See page 27 for a detailed reconciliation

Notes: 1. Straight line rental revenue and expense has been removed from this breakdown given net neutral impact 2. Underlying EBITDA represents net profit / (loss) after tax adjusting for the following items, (i) depreciation and amortisation, (ii) net finance costs, (iii) fair value movements, (iv) interest income, (v) IPO Offer And Asset Acquisition Costs, (vi) inclusion of lease cash costs, (vii) the impact of rental straight lining and amortisation of lease incentives, (viii) tax, and (ix) CHI1 pre-completion rental income. 3. FFO represents the Stapled Group's underlying and recurring earnings from its operations and is determined by adjusting the statutory net profit or loss for items which are non-cash, unrealised or capital in nature. The accounting policies adopted for internal reporting to the CODM are consistent with those adopted in the consolidated financial statements. 4. Adjusted FFO includes interest costs attributable to the portion of CHI1 receiving pre-completion rental income. 5. Average exchange rate for 1H FY26 was 0.66.

Balance sheet

Resilient portfolio valuation provides platform for continued asset recycling and organic growth

\$m, unless otherwise stated	Dec-25	Jun-25	Commentary
Cash and cash equivalents	349	425	
Trade and other receivables	24	19	
Other current assets	104	178	
Current assets	477	622	
Property, plant & equipment	2,025	2,026	
Investment properties	1,620	1,418	
Intangible assets	376	382	
Other non-current assets	75	117	
Non-current assets	4,096	3,942	
Total assets	4,573	4,565	
Trade and other payables	113	89	
Other current liabilities	56	74	
Current liabilities	169	162	
Borrowings	1,828	1,839	
Other non-current liabilities	82	66	
Non-current liabilities	1,910	1,904	
Total liabilities	2,079	2,067	
Net assets	2,494	2,498	
Net debt¹	1,512	1,453	
Securities on issue (m)	553.5	551.1	
Balance sheet NAV per security (\$/s) ²	4.50	4.53	
Adjusted NAV per security (\$/s) ³	4.62	4.56	

Notes: 1. Net debt includes total borrowings less cash and cash equivalents. 2. Net asset value is calculated as net assets divided by the number of securities on issue. 3. Adjusted NAV reflects independent valuation of \$2.4bn for Australian assets as at Jun-25, adjusted for capex spent in 1H FY26.

Capital position and funding

Liquidity of \$658m and 35.8% gearing as at Dec-25

\$m, unless otherwise stated	Dec-25	Jun-25	Commentary																																			
Debt Summary																																						
Facility limit (bank debt)	2,170	2,193																																				
Drawn debt ¹	1,861	1,878																																				
Weighted average tenor (years) ²	3.4	4.0																																				
Liquidity																																						
Cash at bank	349	425																																				
Senior facility undrawn	309	315																																				
Cash and undrawn debt	658	740																																				
Key Debt Metrics																																						
Gearing ³	35.8%	35.1%																																				
Debt hedged	100.0%	100.0%																																				
Weighted average debt cost (% p.a.) ⁴	6.0%	6.0%																																				
Debt Maturity Profile (\$m)																																						
 Australia United States Undrawn																																						
<table border="1"> <thead> <tr> <th>Period</th> <th>Australia (\$m)</th> <th>United States (\$m)</th> <th>Undrawn (\$m)</th> <th>Total (\$m)</th> </tr> </thead> <tbody> <tr> <td>FY26</td> <td>300</td> <td>0</td> <td>0</td> <td>300</td> </tr> <tr> <td>FY27</td> <td>0</td> <td>920</td> <td>0</td> <td>920</td> </tr> <tr> <td>FY28</td> <td>0</td> <td>0</td> <td>9</td> <td>9</td> </tr> <tr> <td>FY29</td> <td>300</td> <td>0</td> <td>0</td> <td>300</td> </tr> <tr> <td>FY30+</td> <td>0</td> <td>920</td> <td>9</td> <td>920</td> </tr> <tr> <td>Total</td> <td>658</td> <td>1,861</td> <td>309</td> <td>1,250</td> </tr> </tbody> </table>				Period	Australia (\$m)	United States (\$m)	Undrawn (\$m)	Total (\$m)	FY26	300	0	0	300	FY27	0	920	0	920	FY28	0	0	9	9	FY29	300	0	0	300	FY30+	0	920	9	920	Total	658	1,861	309	1,250
Period	Australia (\$m)	United States (\$m)	Undrawn (\$m)	Total (\$m)																																		
FY26	300	0	0	300																																		
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Total	658	1,861	309	1,250																																		
FY26	FY27	FY28	FY29	FY30+																																		

Notes: 1. Assumes 0.67 AUD/USD exchange rate. 2. Weighted average debt tenor has been calculated based on the maturity dates of individual facilities, weighted by each facility's committed amount and assumes options to extend are exercised. 3. Gearing is defined as borrowings (excluding unamortised establishment costs) less cash and cash equivalents divided by total assets excluding cash and cash equivalents. 4. Excludes interest income and includes undrawn commitment fees.

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LAX Update



Los Angeles development

Development approval timing update

Status update

- Recent community focus on energy and water usage for data centre developments have driven additional engagement and delayed approval process
- DGT has voluntarily agreed to prepare an Environmental Impact Report (“EIR”) to assist in addressing community questions
- Underlying investment thesis remains compelling given strong tenant demand for capacity in Southern California

- Combined 33 acres of land is strategically located for alternative uses
- Independent valuation (as is basis) supports at least US\$71m carrying value
- Will be disciplined and decisive regarding capital allocation for this project

LAX1 renderings



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Outlook



Outlook and guidance

FY26 guidance of \$125m at top end of previous guidance range despite foreign currency headwinds

\$125m

FY26 Underlying EBITDA

\$180m

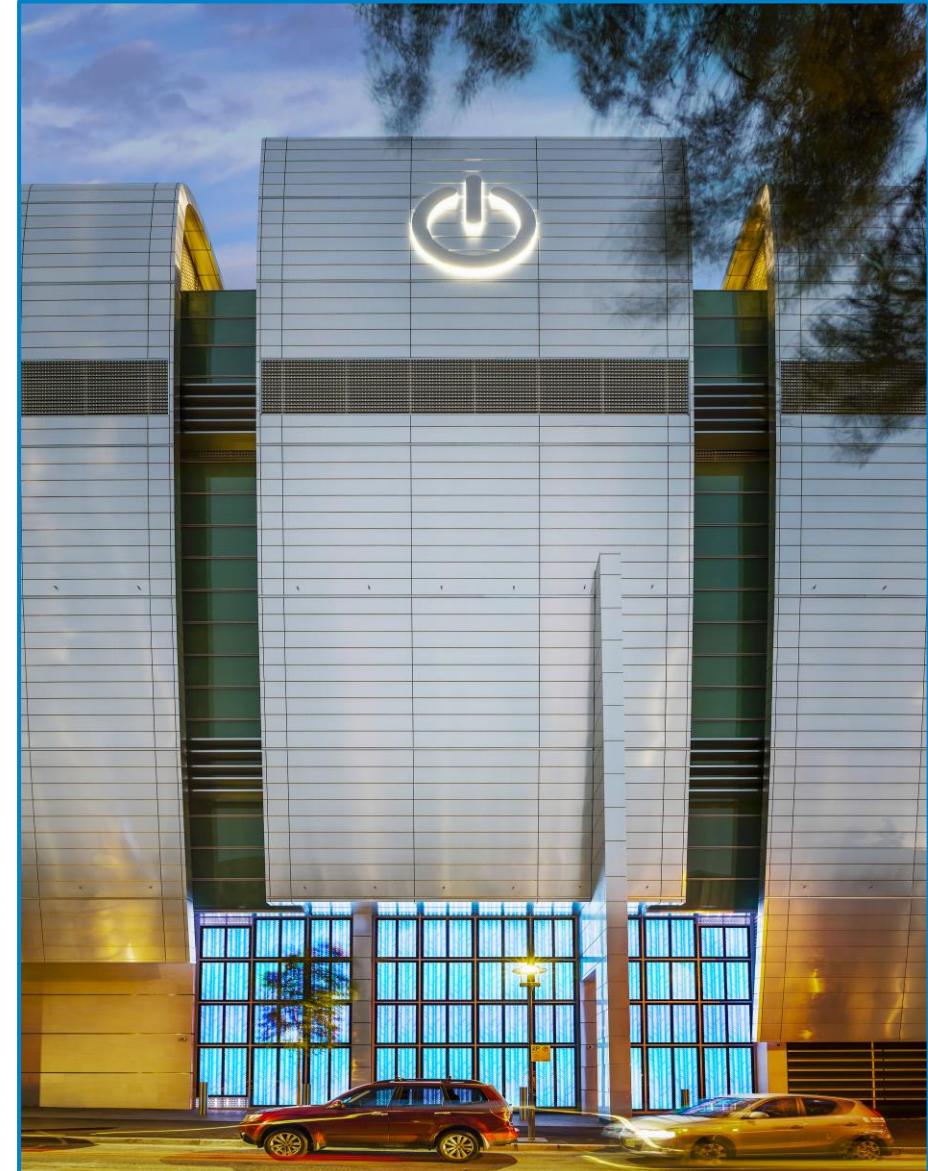
July 2026 annualised
run rate EBITDA

85MW

Contracted
IT Capacity

12.0c

FY26 DPS



- FY26 Underlying EBITDA is expected to be \$125m, at the top end of previous guidance of \$120 - \$125m, despite foreign currency headwinds¹
- July 2026 annualised run rate EBITDA of \$180m maintained despite foreign currency headwinds¹
- Growth capex in FY26 maintained at \$160 - \$180m due to SYD1 capacity expansion, funded through existing cash reserves and undrawn debt facilities
- Distributions in FY26 expected to be 12 cents per security, in line with policy of 90 – 100% payout of FFO

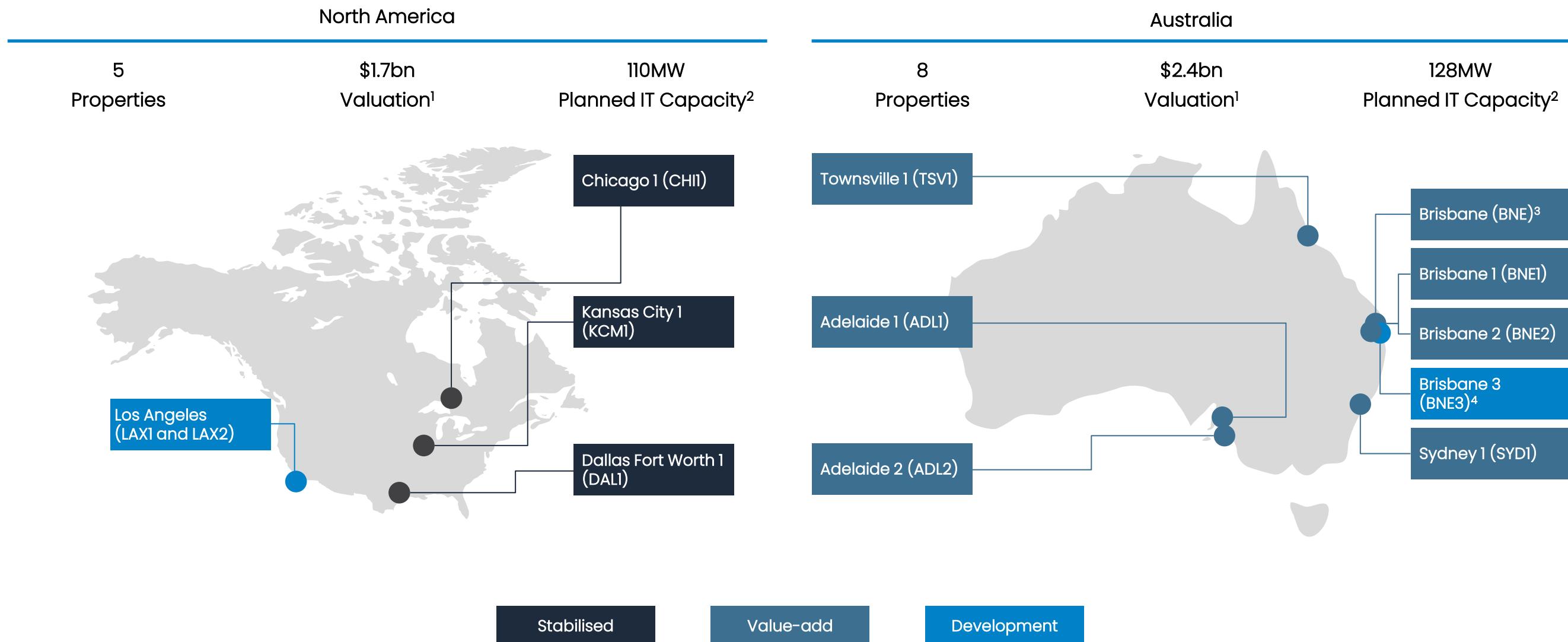


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Supplementary Information – Portfolio Update

Portfolio update

Global portfolio and broad investment mandate across stabilised, value-add and development opportunities



Notes: 1. Independent valuation as at June 2025 (translated at a foreign exchange rate of 0.65 AUD/USD). Reflects independent valuation of DGT's entire portfolio comprising SYDI, iseek and US assets. 2. Planned IT Capacity is the total of Installed IT Capacity and Future Expansion IT Capacity. 3. Note BNE has been renamed (previously was BNE3 at time of PDS). 4. Note BNE3 has been renamed (previously BNE4 at time of PDS), given location is physically adjacent to BNE1 & BNE2.

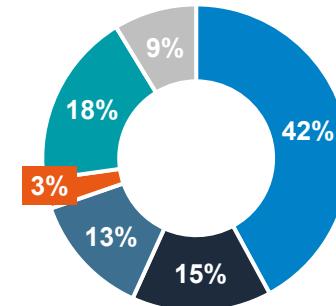
Portfolio update (cont'd)

High-quality customer base with long-term relationships that will support stable and growing cashflows

Portfolio summary statistics

Metric	North America	Australia	Total Portfolio
Number of Properties	5	8	13
Independent Valuation ¹	\$1.7bn	\$2.4bn	\$4.1bn
Billing IT Capacity	32MW	19MW	51MW
Contracted IT Capacity	44MW	41MW	85MW
Planned IT Capacity ²	110MW	128MW	238MW
Number of Customers	2	>550	>550

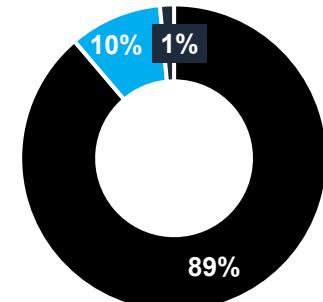
Sector mix³

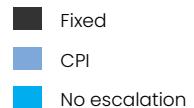




 Hyperscaler Government enterprise
 Cloud services and software Financial services
 Telecom Other

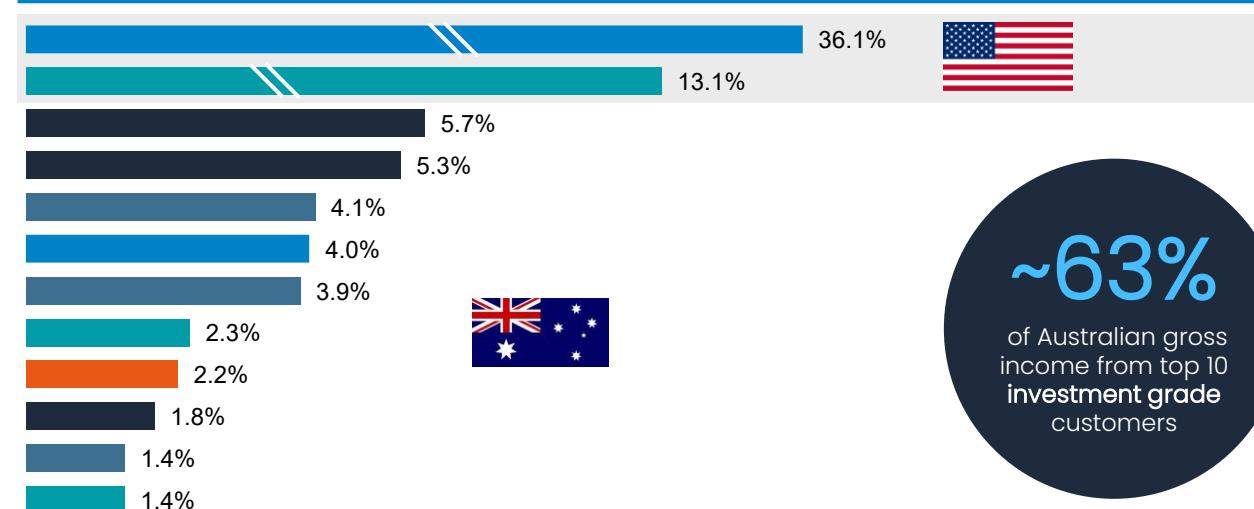
Service fee escalations³





 Fixed
 CPI
 No escalation

Top 10 customers – by gross income (%)³

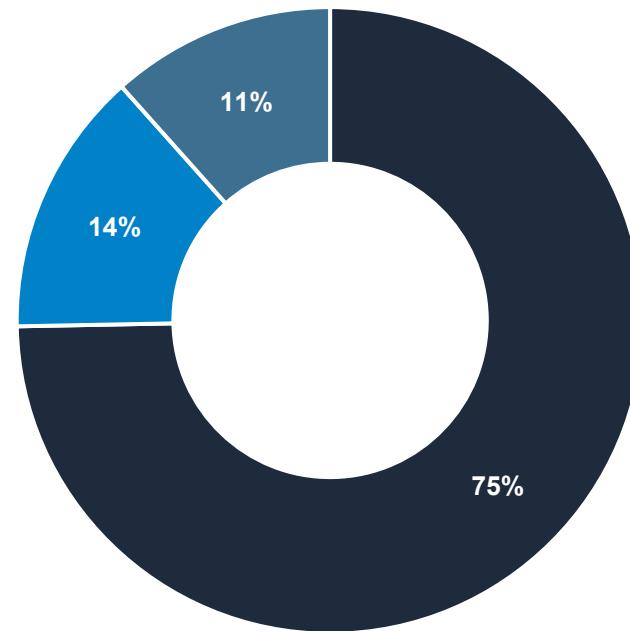


~63%
 of Australian gross
 income from top 10
 investment grade
 customers

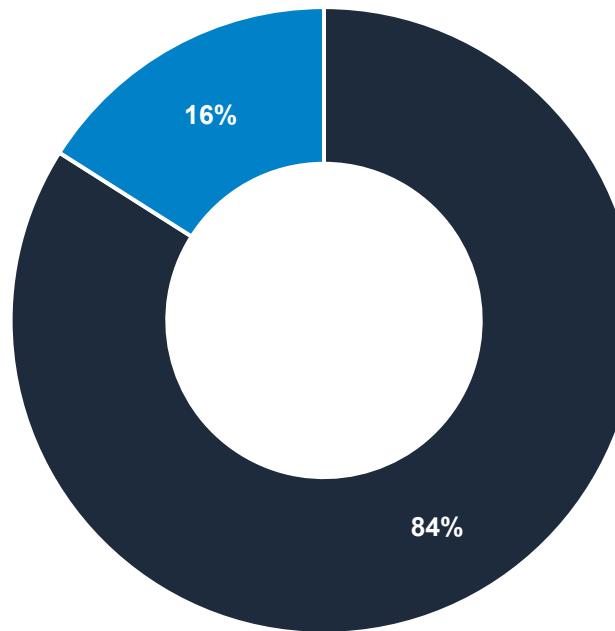
Portfolio update (cont'd)

High-quality customer base with long-term relationships that will support stable and growing cashflows

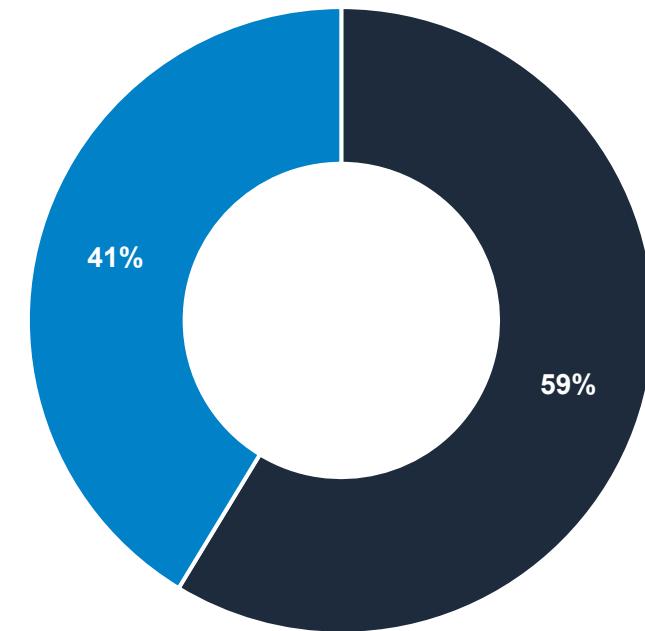
Revenue Mix by Income¹



Credit Quality by Income²



Portfolio Mix by Value³



■ Service fee revenue ■ Interconnection ■ Other

■ Investment Grade or Equivalent⁴ ■ Not rated

■ Australia ■ United States

Highly connected, critical infrastructure

Strong credit quality customer base

Geographically diversified portfolio



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Supplementary Information – Other

Sustainability

Committed to sustainable practice that drives long term creation and achieve a positive impact on the communities in which we operate

Sustainability highlights

- In line with the wider HMC Group, DGT is reviewing its **sustainability strategy** and **objectives** to align with the wider business evolution. We expect to provide more detail following completion of this project
- DGT is a 'Group 1' entity under the Australian Sustainability Reporting Standard (ASRS) climate disclosure requirements
 - As such, DGT is preparing its first Australian Accounting Standards Board (AASB) S2 Climate-related Financial Disclosures for FY26 (1 July 2025 to 30 June 2026)
- DGT maintains a commitment to gender diversity and has **67% female** representation for **independent Board of Directors**
- **Inaugural Modern Slavery Statement** for DGT published in December 2025

Sustainability focus areas



Emissions Reduction Commitment

- Emission reduction targets under review to align with wider HMC Group policy



Energy Efficiency & Renewable Energy Adoption

- Exploring renewable energy sources and optimising infrastructure to reduce carbon intensity



Water Conservation

- Managing high water usage with advanced cooling technologies

Australian growth projects

Commencements of ADL1 and BNE3 developments subject to cornerstone customer and capital partnering



ADL1

- Project upsized to **deliver 15MW of IT Capacity**, increased from 8MW
- Project to support Government, Hyperscale and Co-location workloads
- Space will be used to cater to a wide range of densities and security requirements

Strategy

Development

Planned IT Capacity

15MW

Design Tier

Tier III (Existing)
Tier IV (Expansion)

Incremental increase in expansion opportunity to 15MW (from 8MW)



BNE3

- In discussions with **Brisbane Airport Corporation ("BAC")**, to develop an additional campus site adjacent to existing facility at BNE2
- **Greenfield site is ~10k sqm** expected to deliver **20MW of IT Capacity**

Strategy

Development

Planned IT Capacity

20MW

Design Tier

Tier IV

20MW BNE3 development expected to be 12-15%+ yield on cost

Underlying EBITDA and FFO reconciliation

\$m, unless otherwise stated	Jul-25 to Dec-25	Jan-25 to Jun-25
Underlying EBITDA¹	57.2	49.6
Depreciation and amortisation	(54.1)	(54.8)
Net finance costs	(39.6)	(38.1)
CHI pre-completion rent received	(18.5)	-
Fair value movements	69.7	6.5
Transaction costs	(1.0)	-
Interest income	7.2	8.4
Tax benefit	14.0	5.2
Lease accounting and other	3.0	2.6
NPAT	37.9	(20.6)
Depreciation and amortisation	54.1	54.8
Fair value movements	(69.7)	(6.5)
CHI pre-completion rent received	18.5	-
Scrip paid management fees	11.1	10.8
Transaction costs	1.0	-
Amortisation of capitalised debt establishment fees	5.4	5.1
Lease accounting and other	(0.9)	(1.4)
Tax benefit	(14.0)	(5.2)
FFO²	43.4	37.0
CHI pre-completion interest payments	(12.9)	-
Adjusted FFO³	30.5	37.0

Notes: 1. Underlying EBITDA represents net profit / (loss) after tax adjusting for the following items, (i) depreciation and amortisation, (ii) net finance costs, (iii) fair value movements, (iv) interest income, (v) IPO Offer And Asset Acquisition Costs, (vi) inclusion of lease cash costs, (vii) the impact of rental straight lining and amortisation of lease incentives (viii) tax, and (ix) CHI pre-completion rental income. 2. FFO represents the Stapled Group's underlying and recurring earnings from its operations and is determined by adjusting the statutory net profit or loss for items which are non-cash, unrealised or capital in nature. The accounting policies adopted for internal reporting to the CODM are consistent with those adopted in the consolidated financial statements. 3 Adjusted FFO includes interest costs attributable to the portion of CHI receiving pre-completion rental income.

Glossary

Term	Meaning	Term	Meaning
ADL	Adelaide (used in site names like ADL1, ADL2)	IRR	Internal Rate of Return
AI	Artificial Intelligence	IT	Information Technology
AASB	Australian Accounting Standards Board	KCM	Kansas City (used in site name KCM1)
AUD	Australian Dollar	LAX	Los Angeles (used in site names LAX1, LAX2)
BAC	Brisbane Airport Corporation	LTIFR	Lost Time Injury Frequency Rate
BNE	Brisbane (used in site names like BNE, BNE1, BNE2, BNE3)	MW	Megawatt
CHI	Chicago (used in site name CHI1)	NAV	Net Asset Value
CODM	Chief Operating Decision Maker	NPAT	Net Profit After Tax
CPI	Consumer Price Index	NSW	New South Wales
DAL	Dallas Fort Worth (used in site name DAL1)	NZ	New Zealand
DGT	DigiCo Infrastructure REIT	PDS	DGT's Replacement Prospectus and Product Disclosure Statement dated 5 December 2024
EBITDA	Earnings Before Interest, Taxes, Depreciation, and Amortisation	QLD	Queensland
FFO	Funds From Operations	REIT	Real Estate Investment Trust
FY	Financial Year	SYD	Sydney (used in site name SYD1)
GW	Gigawatt	Tier III / IV	Data centre design tiers (Uptime Institute standards)
HCF	Hosting Certification Framework	TRIFR	Total Recordable Injury Frequency Rate
HPC	High Performance Computing	TSV	Townsville (used in site name TSV1)
IFRS	International Financial Reporting Standards	WHS	Work Health and Safety

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