

Corporate Presentation

4Q25

Grupo Rotoplas S.A.B. de C.V.



# Who is Rotoplas?

**Leading company in the water industry** | With over 45 years of experience, we are the Mexican company driving the transformation of water across the Americas, from Mexico to Argentina.

**A synonym for quality and trust** | We are the industry standard and the brand that ensures safe water, turning innovation into peace of mind and well-being for millions of households.

**Powered by impact and sustainability** | We see water as the engine of well-being. Our technology and purpose come together to create sustainable solutions that ensure the availability and care of every drop.

**Experts in the complete water cycle** | We master the entire ecosystem, offering a comprehensive portfolio.

**Innovation centered on well-being** | Our evolution is driven by challenging the status quo. We were pioneers in replacing risky materials with safer and more efficient solutions.

## Products



## Services



Asbestos tank



Triple-layer polyethylene tank with antibacterial protection

Copper piping



High-resistance PPR piping with heat-fusion technology

Single-use plastic bottles



On-site purification service with IoT solutions

### Our Purpose

We exist to transform people's quality of life by ensuring water is used to its fullest extent

### Our Mission

For people to have more and better water

### Our Vision

Offer non-centralized and sustainable water solutions, with relevant benefits for our customers, within the Rotoplas Way

We are currently at a crucial point in addressing water-related problems

A **40% gap** between global **water supply and demand** is projected by **2030**

We could **exhaust our fresh water supply by 2040** at the current rate of consumption

At least 69% of the impact of **climate change is manifested through the water cycle**

# Investment considerations

01 The Water Industry

02 Our Solutions

03 Our Strategy

04 Our Results

01

# The Water Industry

# The climate crisis exposes critical inefficiencies, creating opportunities across the water industry

## What you need to know:



- **75%** of our planet is **covered** by **water**, but **less** than **1%** is **usable**.
- Water **demand** has **increased** by **40%** over the last 40 years and is **expected** to **rise** an additional **25%** by **2050**, while **supply** has more than **halved** since **1970**.
- We could **exhaust** our **fresh water supply** by **2040** at the current rate of **consumption**.
- **80%** of global **wastewater** is **discharged** into the **sea without** adequate **treatment**.
- **Microplastics** are present in **83%** of **drinking water**.
- **57%** of global freshwater **aquifers** are **overexploited**.
- **One third** of **freshwater** in pipelines is **lost** due to **leaks**.
- The **climate** and **water crises** are **interconnected**: for every **+1°C**, there is a **20% reduction** in renewable **water**.
- At least **69%** of the **impact** of **climate change** is **manifested** through the **water cycle**.
- **Every dollar invested** in water access and sanitation **could yield \$7** in **returns**<sup>1</sup>.
- **Solving** the global **water crisis** would **cost** only **1%** of the **annual GDP** until **2030**.
- Approximately **78%** of the **capital employed** in **water security** comes from the **public** sector, but it is **expected** to **fall** to **43%** in the next decade, while **private capital** will **increase** from 3.8 to **12.6 trillion** dollars<sup>2</sup>.

02

Our Solutions

# A story inspired by water | 45+ years of execution, growth, and innovation

Rotoplas is born in Mexico



1978

The first polyethylene water tank is launched

1978



International expansion begins with the plant in Guatemala

1996



Rotoplas starts operating in Argentina

1997

Acquisition of Talsar in Argentina and Sytesa (RSA) in Mexico

2016



Start of operations in the USA

2015



Rotoplas is listed on the BMV under the ticker AGUA\*

2014



Launch of Tuboplus

2003



Issuance of the first Sustainable Bond in LATAM & Entry into the Dow Jones Sustainability MILA Pacific Alliance

2017



Start of the Flow transformation program

2019



Launch of the Sustainable Growth Plan for 2025

2020

Update of the Sustainability Strategy

2021



Start of technological update in plants in Mexico

2022



Launching of B2B and B2C e-commerce platform in Mexico

2024

Launching of IoT solutions for products and services

2025



Rotoplas' history is proof of our adaptability and ability to evolve from a manufacturing company into a solutions leader across the entire water cycle.

# The power of our operating platform | Efficient large-scale manufacturing and a unique logistics network that ensures full market coverage



18 plants



27 product lines



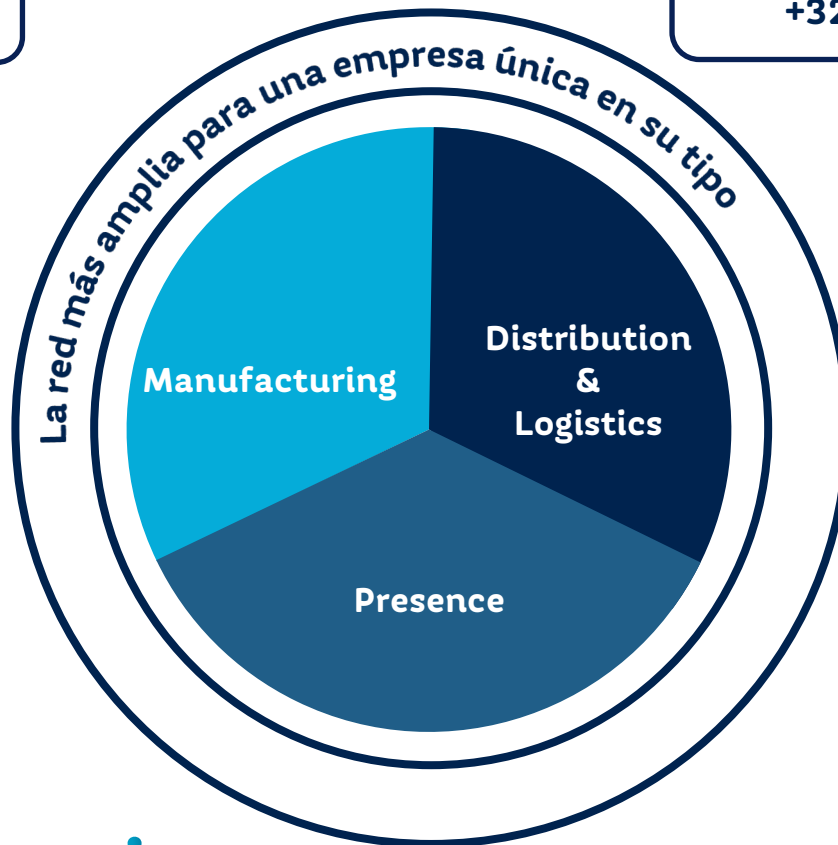
3 service lines



+3,400 suppliers



9 leading brands



+32,000 points of sales



+159,000 points of service



+12,000 distributors



3 distribution centers



Our installed capacity and logistics footprint allow us to absorb demand peaks and scale production without compromising service.

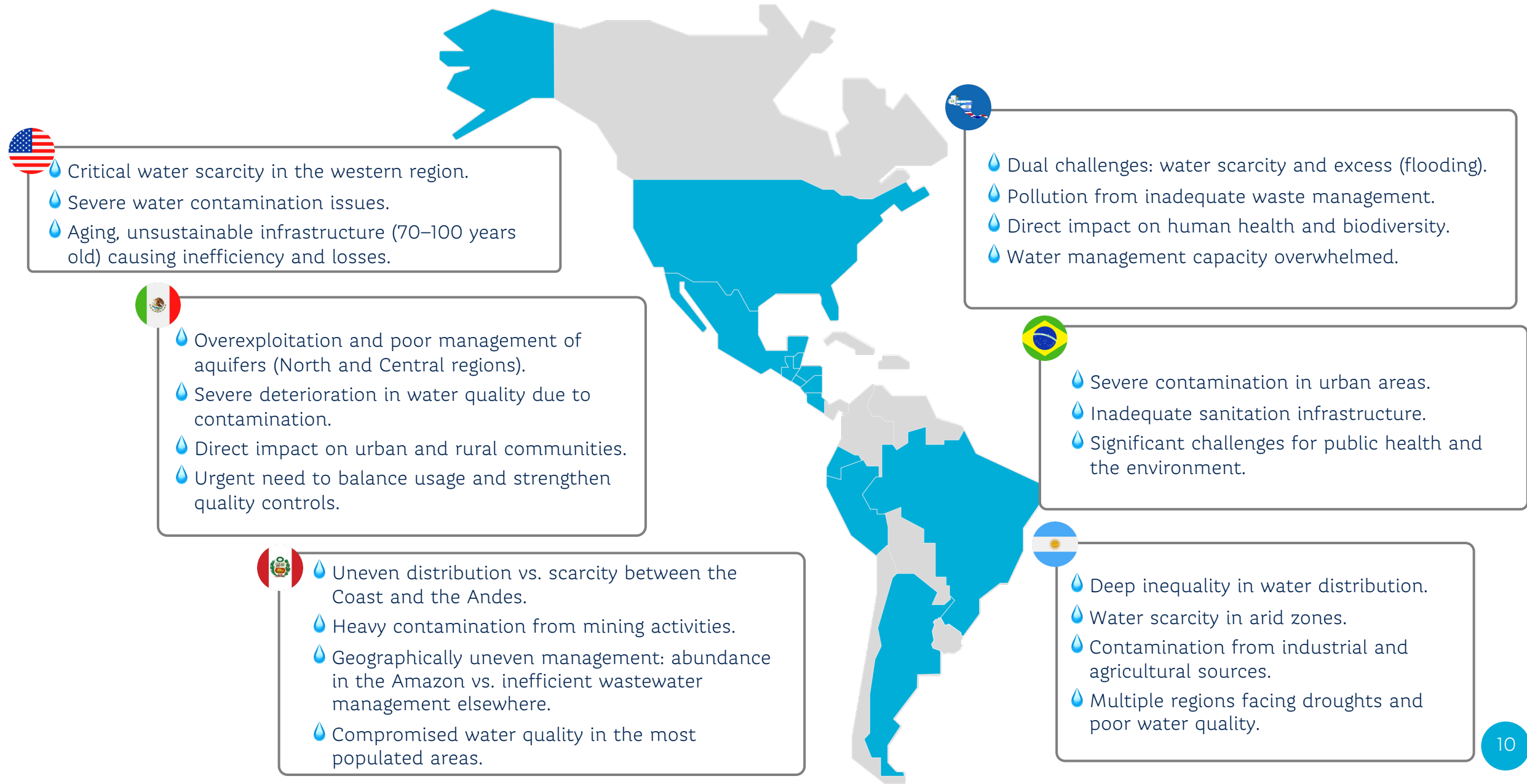
14 countries



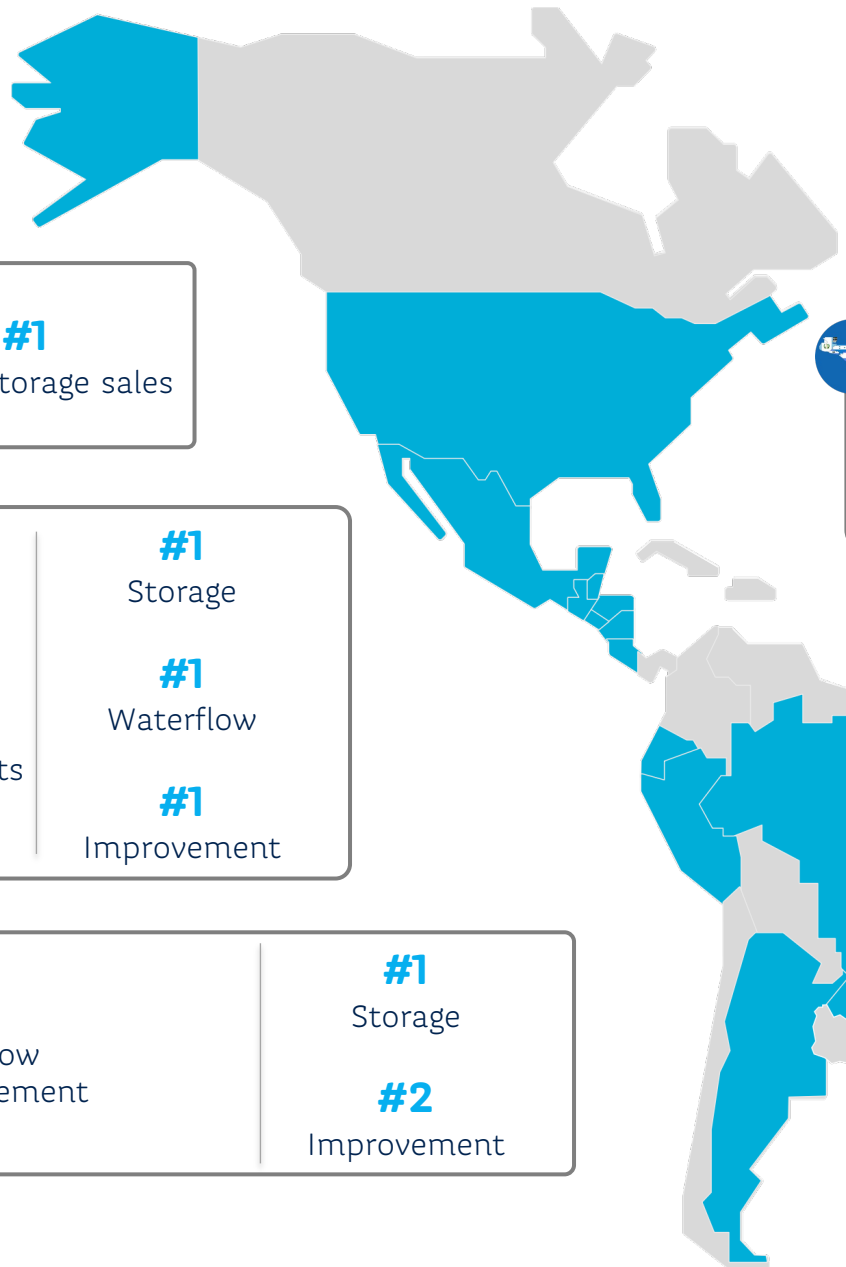
+3,200 employees




# Water Crisis | The opportunity for companies with the ability to develop decentralized solutions





# We set the industry standard | Regional leadership built on the continent's most extensive operating footprint





Our leadership allows us to leverage future growth in services and technologies through an established distribution network.


 **#1**  
 e-Commerce  
 Septic Solutions  
 Online storage sales

 **#1**  
 Storage  
 Waterflow  
 Improvement  
 Storage

 **#1**  
 Storage  
 Waterflow  
 Improvement  
**#1**  
 Storage  
 Waterflow  
**#1**  
 Purification  
 Water Treatment Plants  
 Irrigation  
 Improvement

 **#1**  
 Water Treatment Plants  
 Building a solid pipeline

 **#1**  
 Storage  
 Waterflow  
 Improvement  
**#2**  
 Storage  
 Improvement

 **#1**  
 Storage  
 Waterflow  
 Improvement  
**#1**  
 Storage  
**#1**  
 Waterflow  
**#1**  
 Improvement

# From the water tank, our flagship product, to an ecosystem of solutions that exponentially expands our market potential

## Products | Solutions for adapting to climate change

### Storage



Solutions that address intermittent water supply. This is our foundational and market-leading category, serving as the main access point for millions of customers.



### Waterflow



Pipe and hydraulic connection systems for residential, commercial, and industrial buildings. We tackle inefficiency, leaks, and the renewal of obsolete infrastructure.



### Improvement



Equipment that enhances the water experience. This category transforms our value proposition from “supply” to “comfort,” increasing value for the customer.



- 💧 Leading brands
- 💧 Strong market share
- 💧 Strong cash flow
- 💧 Steady EBITDA – 2025 \$1,414
- 💧 Dividend payment

## Services | Climate change mitigation solutions

### Purification



Water purification systems under a subscription model. They restore trust in water quality, eliminate single-use plastics, and generate recurring income.



### Water Treatment



Large-scale water treatment and recycling solutions (plants) for industrial and municipal clients (B2B/B2G). We address scarcity and sanitation through water reuse.



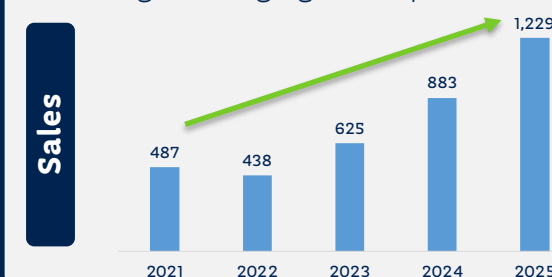
### Irrigation



Smart irrigation systems (AgTech) for the agricultural sector, a high water-consumption market. Focused on improving efficiency and climate adaptation in agriculture.



- 💧 Investment phase:
- 💧 negative cash flow
- 💧 Negative EBITDA 2025 (\$95)
- 💧 Strong earnings growth potential



03

Our Strategy

## Strategic Priorities | Building capabilities to sustain leadership in the next growth wave



### Sustainable growth of the traditional business

- Successful launch of innovations (Tinaco Plus, IoT meter) with strong market acceptance.
- The U.S. consolidated profitability (EBITDA+), achieving double-digit growth and margin expansion.
- Argentina reached financial self-sufficiency, proving the model's resilience.
- Scaling and consolidation of the B2B e-commerce platform.



### Growth and development of new businesses

- bebbia surpassed 159,000 subscribers; sequential margin improvement shows a clear path to breakeven.
- Validation of the RSA services strategy with strong B2B performance and a solid pipeline.
- Launch of new technology platforms to accelerate bebbia's growth.



### Digitization of the water ecosystem

- Launch of IoT solutions in products and services.
- Launch of B2B and B2C e-commerce platforms.
- Implementation of AI conversational agents to provide automated customer support.
- Deployment of a logistics control tower in Mexico to optimize operations.
- Progress in AI-driven predictive sales pilots to enhance planning and engagement.



### Commitment to look after all stakeholders

- Scored 71 points in the S&P Global Corporate Sustainability Assessment (CSA).
- Recognized by CONAGUA as Mexico's #1 Responsible Water Company.
- Included in Newsweek's "World's Most Trustworthy Companies 2025."
- Received HSBC's ELIS 2025 Award for ESG leadership.
- Formed alliances with SUNASS and Heineken to execute water access projects.

## Financial Priorities | Building capabilities to sustain leadership in the next growth wave

# 01.

### Reversing the EBITDA trend through cost and expense reductions

- Decrease in digital expenses
- SG&A: Internal restructuring
- General expense reductions across all business units

# 02.

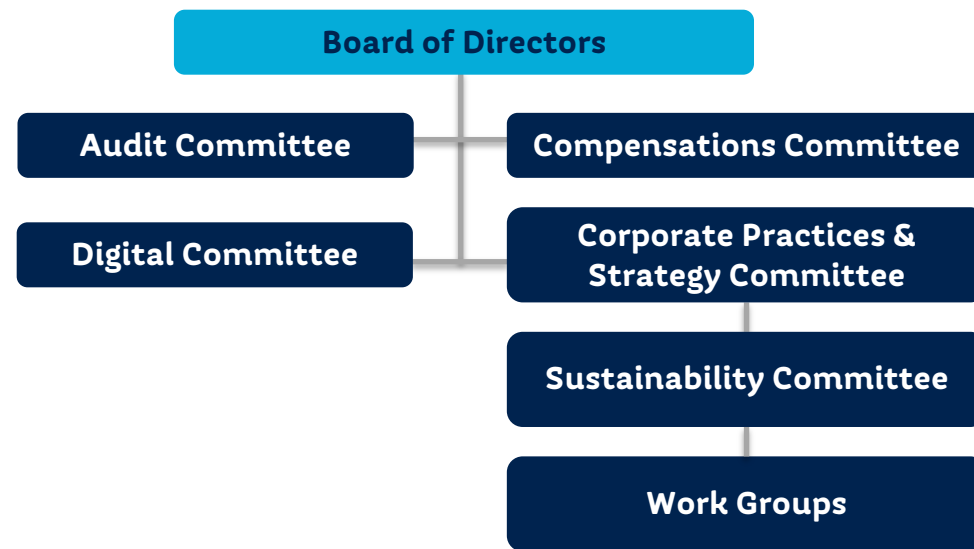
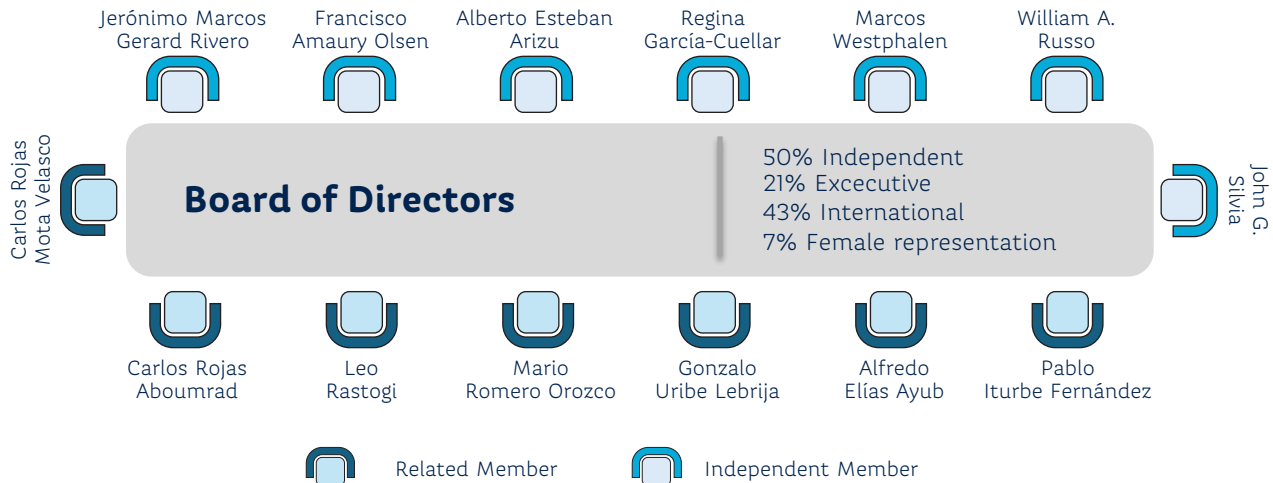
### Increasing free cash flow through optimized working capital and controlled Capex

- Reduce inventories in Argentina and Mexico
- Optimizing accounts receivables by leveraging technology in our processes
- Capex Cherry-Picking Strategy:
  - Prioritize maintenance Capex to sustain the performance of products
  - "Pay-as-you-grow" strategy for services businesses

**We are entering a phase of reduced investment, focusing on reaping the benefits of previous efforts**

**We remain fully committed to generating value for our shareholders**

# Strategic Governance | Ensuring the key capabilities for execution

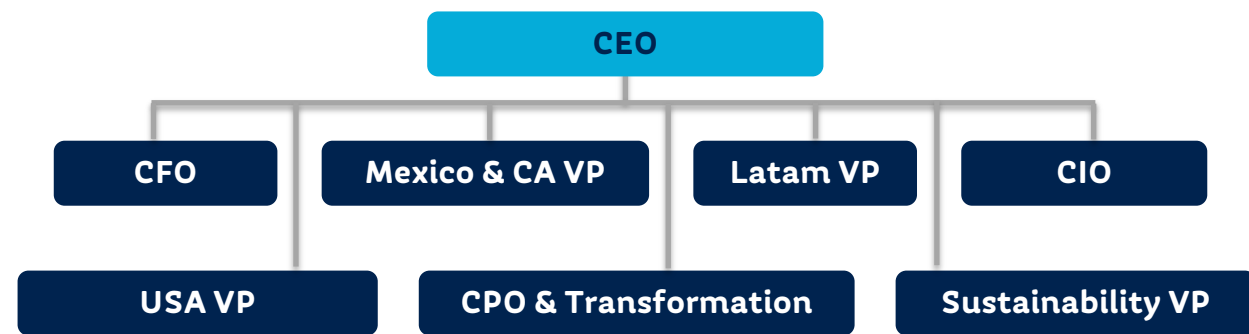


## Strategic pillars and focus

- 💧 Maintain a solid financial position and a healthy growth profile
- 💧 Develop and scale new businesses (services)
- 💧 Drive sustainable growth of the traditional business (products)

## Core capabilities

- 💧 Water Management
- 💧 Digital Transformation
- 💧 Sustainability and ESG
- 💧 Strategic Vision
- 💧 Innovation and Entrepreneurship
- 💧 Financial Strength
- 💧 Risk Management
- 💧 Industrial Expertise
- 💧 Business Development
- 💧 Operational Knowledge



# Discipline in Capital Allocation

## Resource allocation for:



Organic growth



Inorganic growth  
Coherence matrix approach



Share buybacks



Dividend Payment



Debt Payment

## Process:



Project proposal



Evaluation



IRR > WACC

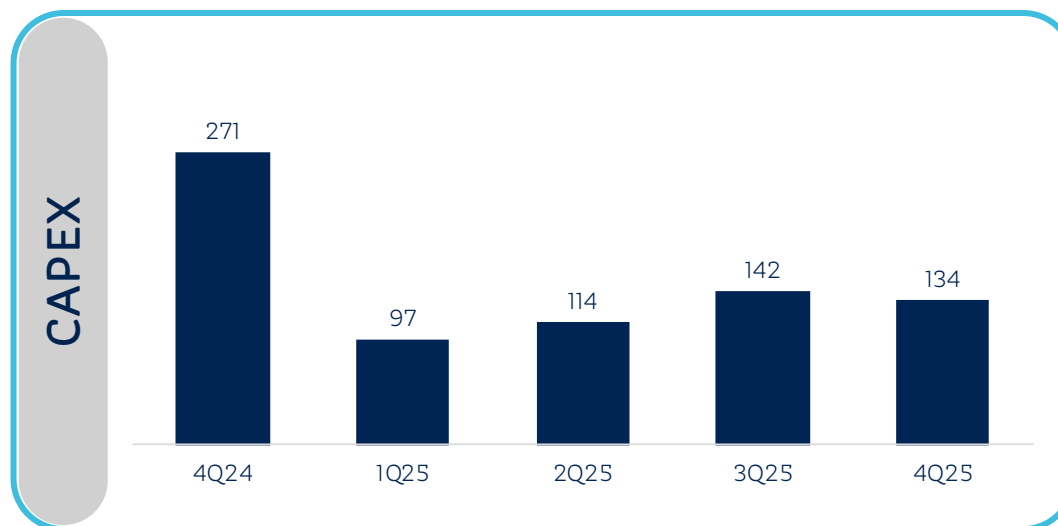


Validation and approval



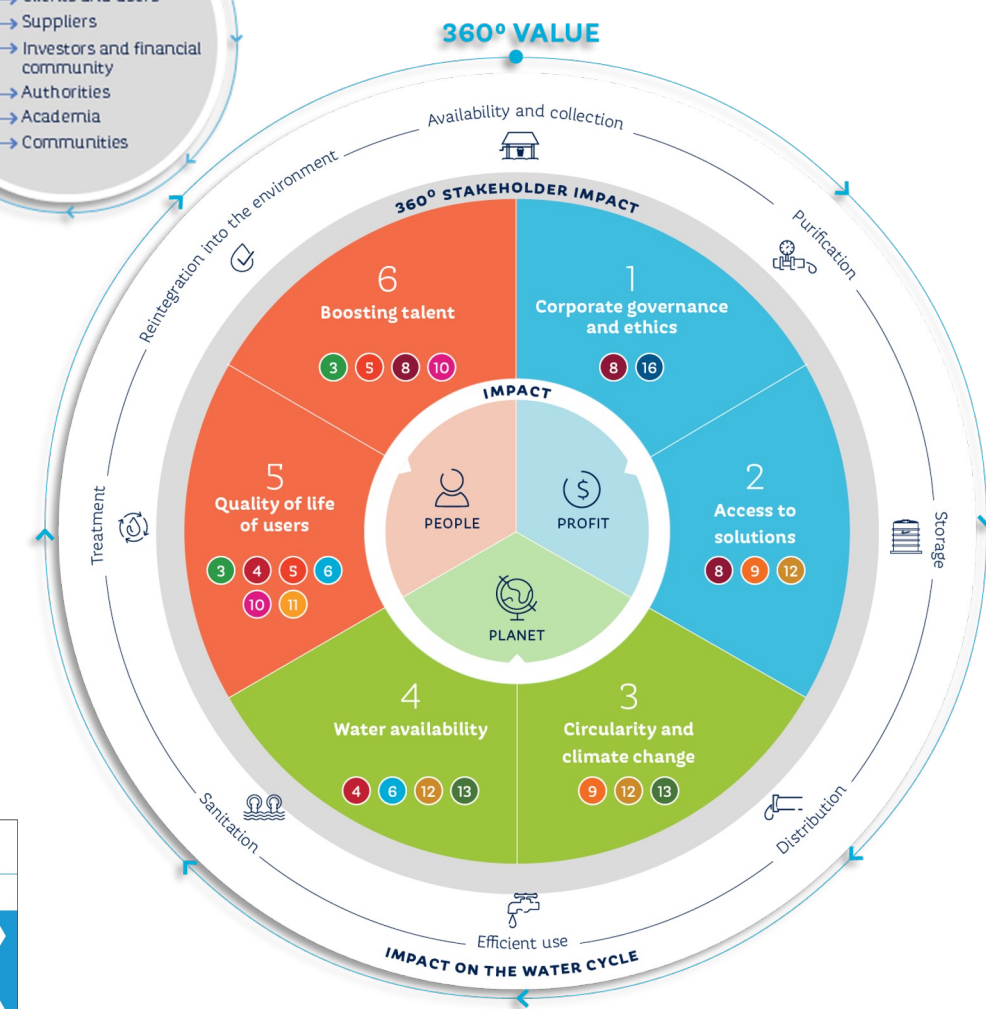
Quarterly status update

Con el apoyo de un Comité de Asignación de Capital



# Where We Come From | Sustainability in Our DNA

**Our trajectory demonstrates a deep and evolving commitment, validated by the most rigorous sustainability frameworks.**



# Our Achievements | Main Progress Under the Current Strategy

## Public Targets 2021 - 2025

	2024	2025	Goal 2025
<b>Profit</b>			
Suppliers evaluated with ESG criteria	76%	98%	100%
Customer Satisfaction (NPS Score)	80	79	80
<b>Planet</b>			
CO <sub>2</sub> Intensity - Scope 1 and Scope 2 – per ton of processed resin	0.38	0.28	0.41
m <sup>3</sup> of purified water using our solutions	1.2 MM	1.4 MM	1.7 MM
<b>People</b>			
People impacted with access to sanitation (cumulative)	1.1 MM	1.2 MM	1 MM
Women in the workforce	25.1%	26.6%	30%

## Relevant Questionnaires

	2023	2024	2025
CSA	68	70	71
CDP Climate Change	A-	B	A
CDP Water Security	B	B	A-
MSCI	BBB	BBB	BBB

## Key Achievements 2021 – 2025

### Environmental

- Measurement of the corporate carbon footprint
- Monitoring of key environmental indicators
- Emission reduction targets approved by SBTi
- Climate-related risks and opportunities assessment
- Product environmental footprints + Environmental Product Declarations (EPDs) for Tinaco Plus+ 1,100L and Tuboplus
- Biodiversity analysis

### Social

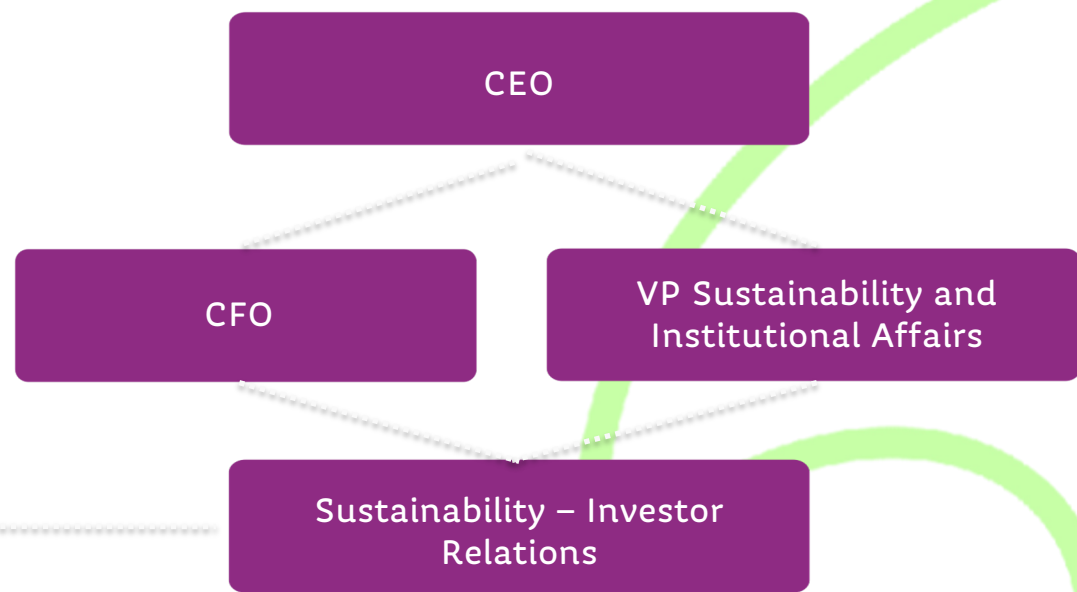
- Group-wide Human Rights assessment
- Gap analysis on workplace equality and non-discrimination
- Onboarding, training, and development programs
- Diversity, equity, and inclusion initiatives
- Volunteer programs in Mexico, Peru, and Argentina

### Governance

- Internal and external communication plans and campaigns
- Evaluation and engagement of critical suppliers
- Sustainability distinctions: ESR, EGS, EHR
- Participation in disclosure questionnaires
- Improved CSA rating
- Updated materiality assessment

# How do we execute the Strategy? | Sustainable Governance Structure

The achievement of goals and progress of the Sustainability Strategy are linked to the variable compensation of the leadership team and key personnel.

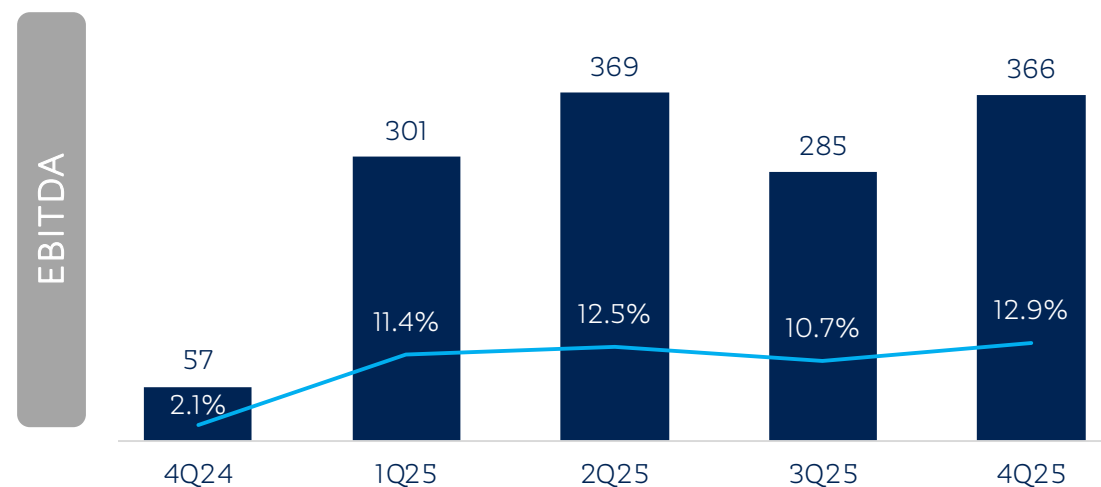
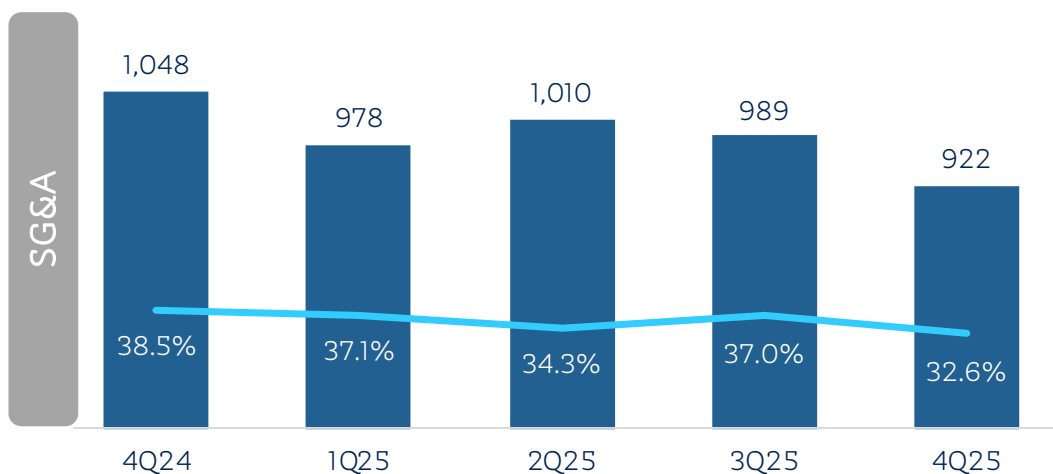
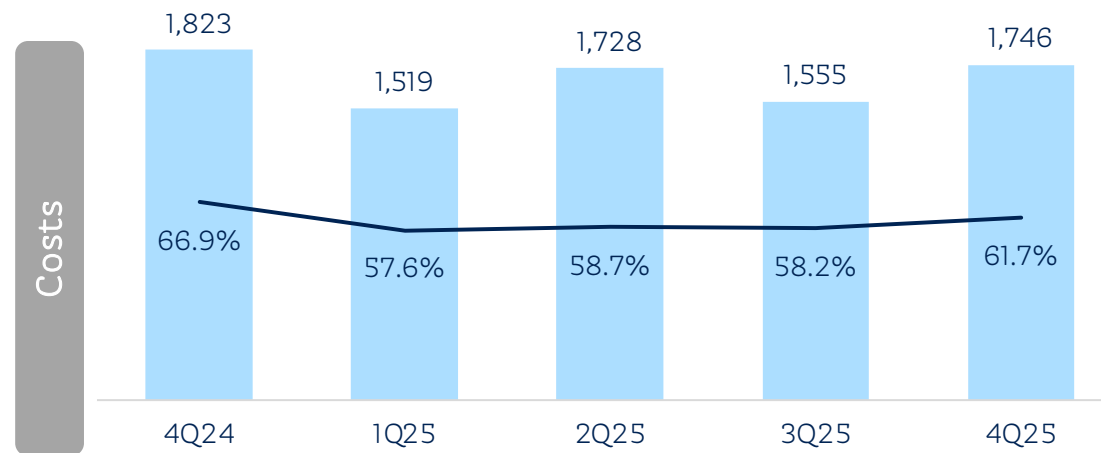
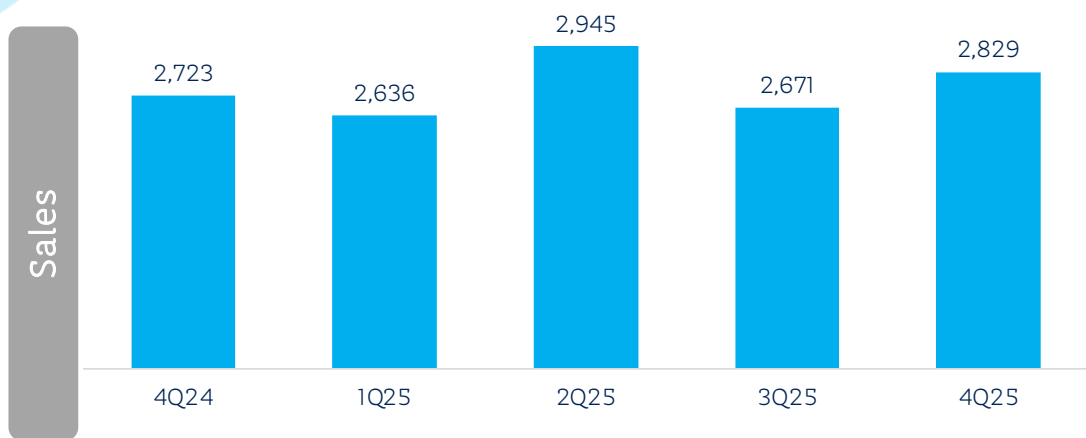


04

Our Results

# Ongoing operational discipline and productivity initiatives improved results in 4Q25

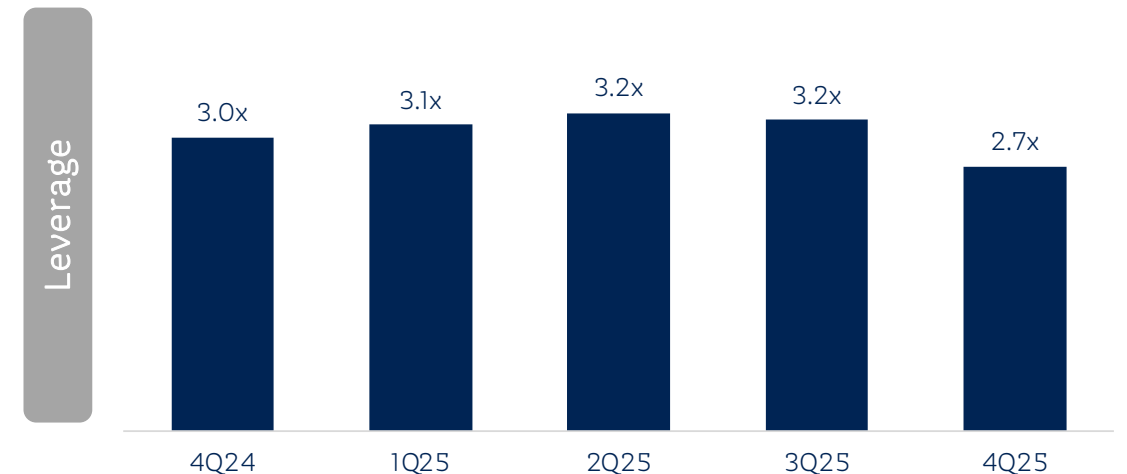
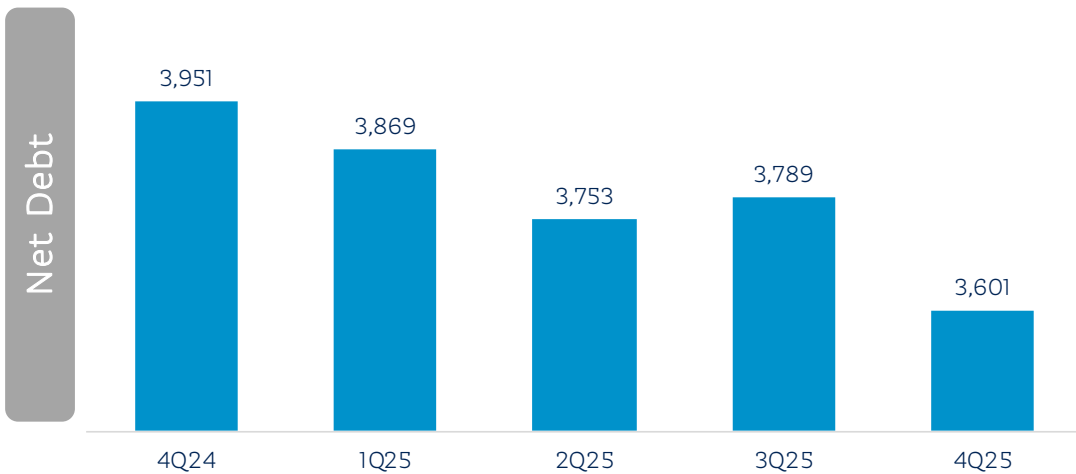
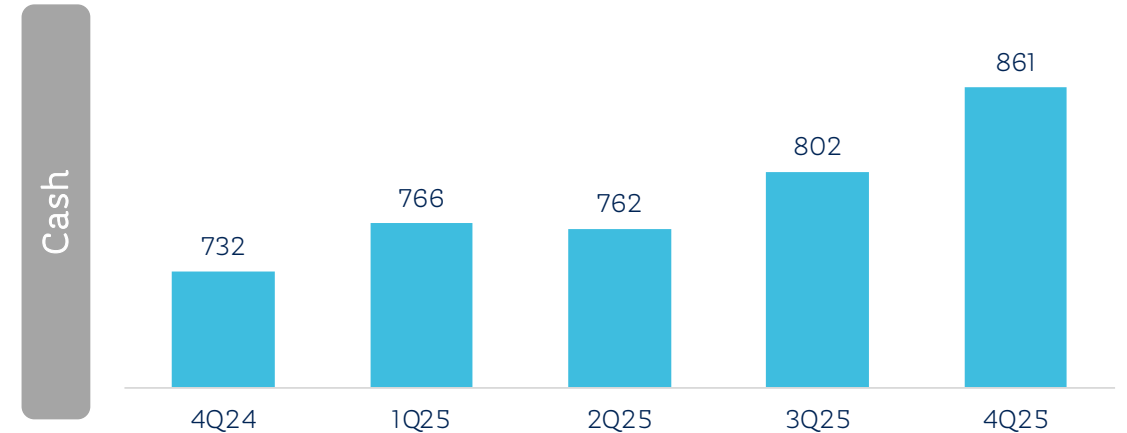
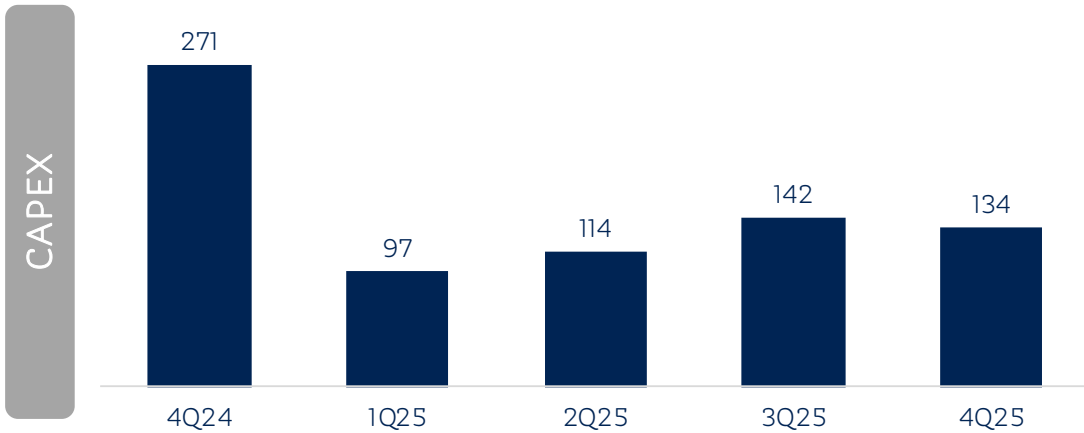
Million MXN



The 4Q24 figures do not include the post-closing audit adjustment related to Argentina's results.

# Ongoing working capital discipline and cash generation drove a 0.3x reduction in leverage to 2.7x

Million MXN

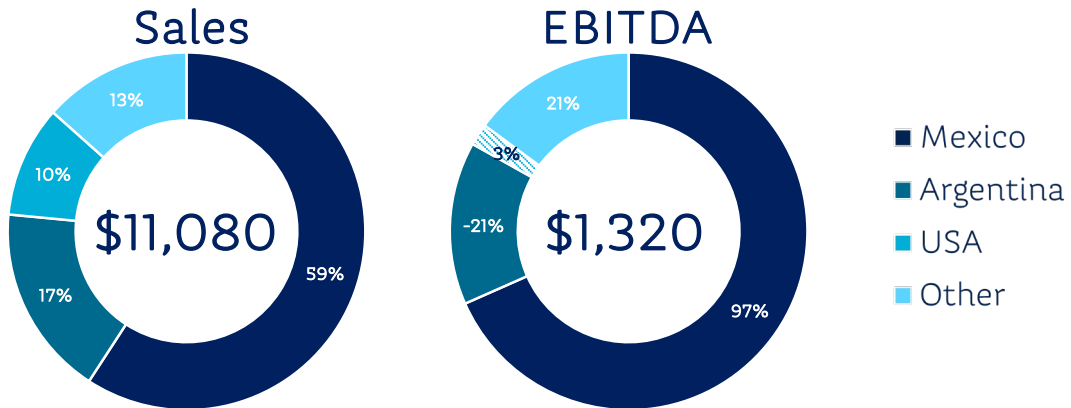


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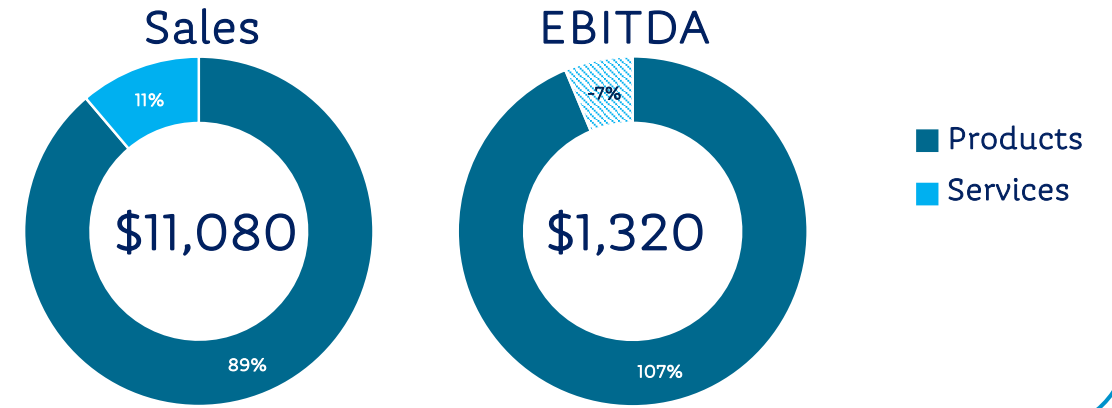
# 2025 Results

MXN mm

## By Country



## By Solution



	2025	2024	Δ %/bps	
Income Statement	Net sales	11,080	11,201	(1%)
	Cost of Sales	6,548	6,379	3%
	<b>Gross Profit</b>	<b>4,532</b>	<b>4,821</b>	<b>(6%)</b>
	<i>Margin</i>	41%	43%	(210) pb
	<b>Operating Income</b>	<b>634</b>	<b>669</b>	<b>(5%)</b>
	<i>Margin</i>	6%	6%	(30) pb
	Financing Result	667	547	22%
	Taxes	7	67	(90%)
	<b>EBITDA</b>	<b>1,320</b>	<b>1,310</b>	<b>1%</b>
	<i>Margin</i>	12%	12%	20 pb
<b>Net Result</b>	<b>(42)</b>	<b>54</b>	<b>NA</b>	

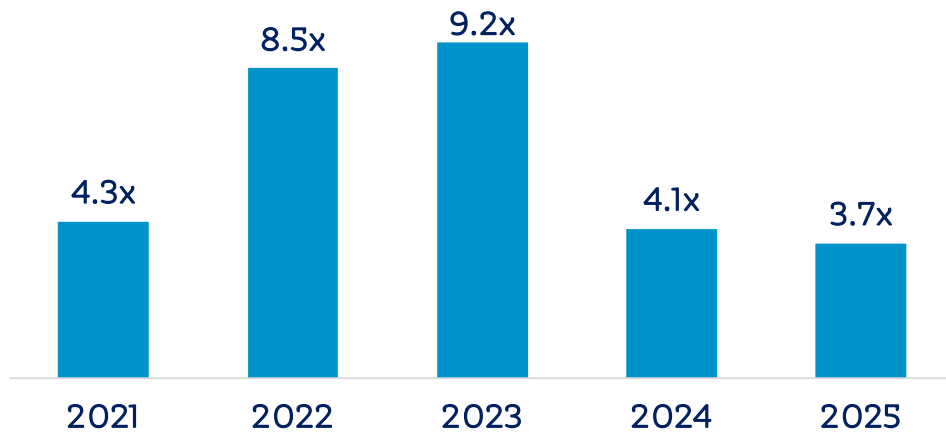
# 2025 Results

MXN mm

## Debt Maturity Profile



## Interest coverage

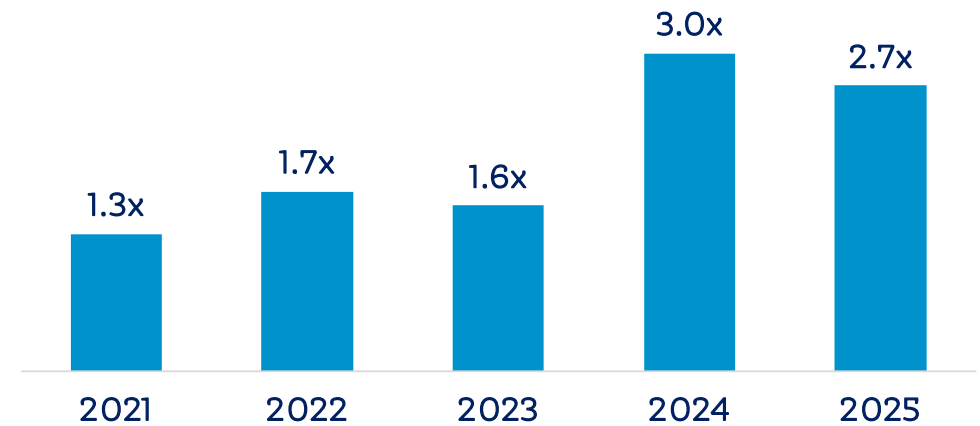


## Balance Sheet

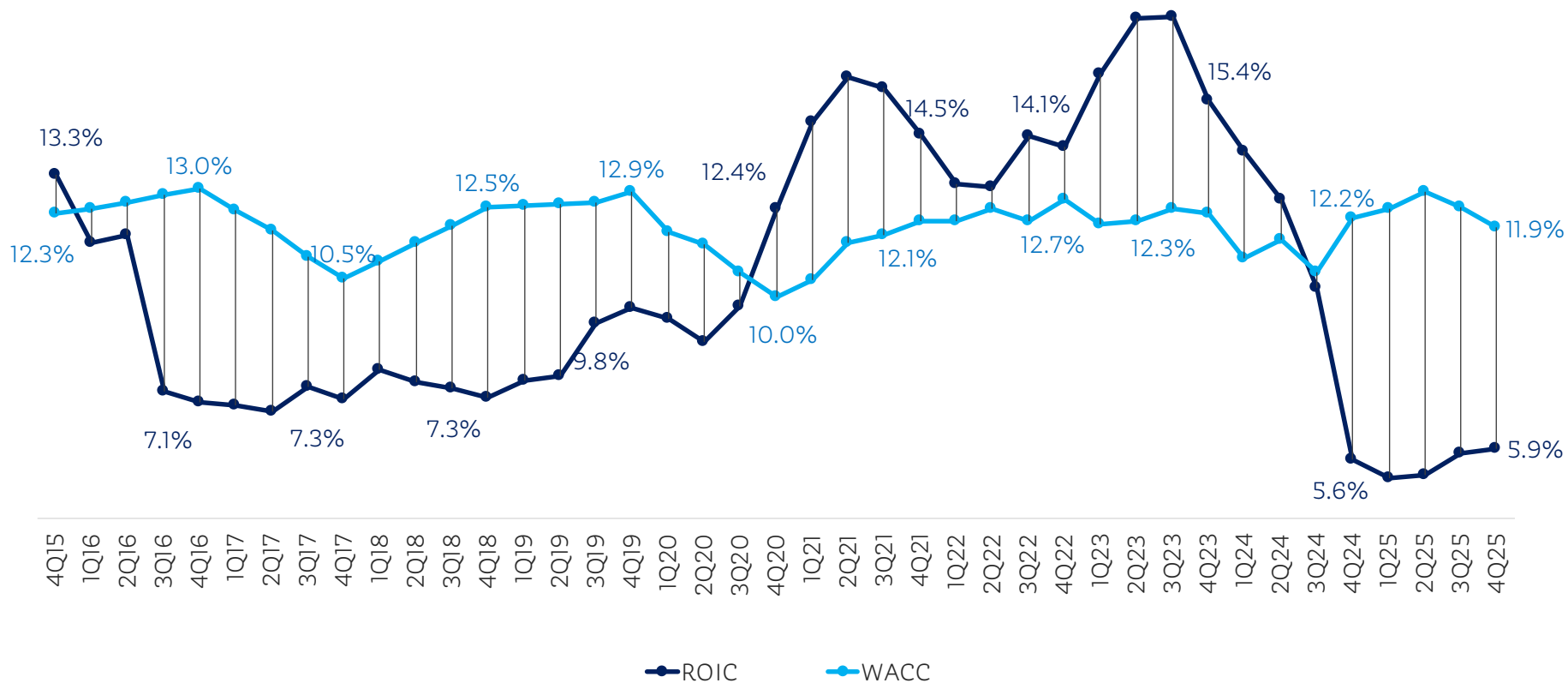
December 2025

Cash and Cash Equivalents	861
Other Assets	12,195
<b>Total Assets</b>	<b>13,056</b>
Financial Debt	4,526
Other Liabilities	2,834
<b>Total Liabilities</b>	<b>7,360</b>
Equity	5,696
<b>Liabilities + Equity</b>	<b>13,056</b>

## Net debt / EBITDA



# ROIC vs. WACC



Recent quarters show a trend reversal, with ROIC on an upward trajectory while WACC trends downward, supported by a disciplined focus to close the remaining 600 bps gap.

The 4Q24 figures do not include the post-closing audit adjustment related to Argentina's results.

ROIC: NOPAT LTM/ Invested Capital LTM, monthly average  
 Invested Capital: Total Assets – Cash and Cash Equivalents – Short-Term Liabilities.  
 ROIC excludes Flow program execution costs from 2Q20 to 4Q21 as they are one-off.

## Key Takeaways

- We are **strengthening our traditional** business with **innovation** and **efficiency**
- Our growing **services platform is unlocking new opportunities** across the water cycle
- **Digital transformation** is **enhancing** how we **operate** and **connect** with **customers**
- **Prior investments are expected to start** delivering visible **results**, leading to **improved cash flow** and **enhanced ROIC**
- **Sustainability** continues to **guide every decision**, creating meaningful **impact** for all **stakeholders**

• <b>AGUA*</b> upside potential.....	<b>Analyst Coverage</b>		
	BTG Pactual	Neutral	\$13.40
	GBM	Outperform	\$38.00
	Signum / Punto	Buy	\$18.64
	Consensus		<b>\$23.35</b>

# Thank you!

## INVESTOR RELATIONS

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