WELCOME TO

ONE CAPITAL MARKETS DAY
2026

Five Years Back, Five Years Forward.
Celebrating 5 Years Since One United Properties’ IPO on the Bucharest Stock Exchange.

SEPTEMBER 11, 2026 · ONE TOWER, BUCHAREST

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Capital Markets Day 2026

September 11th, 2026 09:30 AM | One Tower | Bucharest, Romania

Five years after listing on the Bucharest Stock Exchange, One United Properties invites investors and analysts to look back on the milestones that shaped our journey and ahead to the opportunities that will define our future.

10:00 | Where we started, what we built, and where we are heading

Strategy update by **Victor Căpitanu,** co-founder and co-CEO

10:20 | Five years listed: Building strength for the next growth cycle

Financial update and Fireside chat with **Cosmin Samoilă,** CFO

10:40 | Expanding our addressable market while maintaining quality

Residential Segment update and Fireside chat with **Beatrice Dumitrașcu,** CEO Residential Division

11:00 | Building an office business from scratch: The next chapter

Office Segment update and Fireside chat with **Mihai Păduroiu,** CEO Office Division

11:20 | The long position: Why our early investors are still here

Panel with long-term investors, moderated by **Victor Căpitanu** and **Zuzanna Kurek,** IR Manager

12:00 | Five years in: lessons learned and the road ahead

Fireside chat with **Victor Căpitanu & Andrei Diaconescu,** Co-CEOs

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Where we started, what we built, and where we are heading

Strategy Update by
Victor Capitanu, co-CEO & co-founder
One United Properties

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Four priorities for the next five years

Our strategy: grow intrinsic value and translate it into shareholder value

THE FIVE-YEAR AMBITION

Grow NAV, strengthen independent validation and close the valuation discount.

€2.5bn

NAV ambition

~3.8×

market-value ambition

Grow NAV. Close the discount. Scale the engines of growth.

Illustrative ambition: €2.5bn NAV at par implies ~3.8× pro forma market value, using the 8 Sep 2026 share price.

01 | NAV & VALUE CREATION

Track record, independent NAV validation and the five-year ambition.

02 | ONE INCOME PROPERTIES

Clearer rental asset values and predictable cash flow.

03 | ONE CITY DISTRICT / AFFORDABLE HOUSING

Broader residential demand, faster capital recycling and national scale.

04 | US PARTNERSHIPS / PROMOTE INCOME

Local partners, selective co-investment and promote income.

Four priorities. One objective: compound value per share.

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€1.24bn NAV and 16.5% LTV give us room to compound

Adjusted NAV, loan-to-value and the bridge from gross assets to NAV

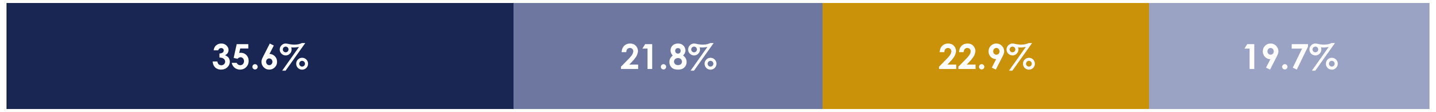
€1.24bn
ADJUSTED NAV
attributable to owners

RON 61.91
NAV PER SHARE
46.4% discount | 8 Sep 2026 close

16.5%
LOAN-TO-VALUE
total external debt / assets under control

€2.036bn
ASSETS UNDER CONTROL
including minority interests

Gross assets attributable to owners €1.780bn



€634m
Residential: finalized + 2026 delivery

€388m
Residential: 2027+ delivery + pipeline

€407m
Rental properties

€351m
Cash + net client receivables

INDEPENDENT VALIDATION BY FY2026 RESULTS

We consider the methodology fair and reasonable. Before publishing FY2026 results, we intend to have it audited and property valuations confirmed by an external valuer.

From gross assets to NAV

€m | owners' share

Gross assets	**1,779.9**
Deferred tax	(156.7)
External debt	(260.3)
Trade payables	(52.0)
Client advances	(71.2)
Adjusted NAV	**1,239.6**

Management estimate; non-IFRS and unaudited. NAV/share pro forma on 105,123,422 shares after planned cancellation of 5,376,578 treasury shares.
Discount uses the RON 33.20 closing price on 8 Sep 2026 versus RON 61.91 NAV/share.

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Double NAV. Aim for approximately 3.8× market value.[2]

Five years of value creation — and our ambition for the next five years

€172m
STARTING CAPITAL
pre-IPO baseline[1]

+ €172.4m
CAPITAL RAISED
In IPO and 2 SPOs

- €77.7m
DIVIDENDS DISTRIBUTED
gross | Jul 2021–Jun 2026

€1.24bn
ADJUSTED NAV AT H1 2026
attributable to owners at H1 2026

Illustrative annualised value growth (XIRR) c.37.9%

€172m management baseline at 2 Jul 2021; terminal NAV at 30 Jun 2026. Gross flows; excludes buybacks and PTO. Opening and closing valuation bases differ.

Three equity raises €172.4m in total

July 2021	IPO	€52.6m
August 2022	SPO	€51.5m
September 2024	SPO	€68.3m

Actual gross RON proceeds, converted at ECB reference rates on closing dates.

30.3% **Implied annual market-value ambition growth over the next five years**

Illustrative ambition; unchanged pro forma share count; in EUR; excludes dividends.

Our next five-year ambition

Grow NAV and close the 46.4% discount

Adjusted NAV today	**€1.24bn**
Five-year NAV ambition	€2.50bn
Required annual NAV growth	~15.1%
Discount today → ambition	46.4% → 0%
Pro forma market value	€0.665bn
Market-value ambition	**~3.8×[2]**

RON 33.20 at 8 Sep 2026 close; EUR/RON 5.25.
105,123,422 pro forma shares after planned cancellation.
[2]Price appreciation only; excludes dividends.

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How NAV growth translates into market value

€2.5bn NAV ambition | four illustrative discount scenarios for 2031

ONE NAV AMBITION, FOUR SCENARIOS

Each scenario assumes the same €2.5bn NAV in 2031. The market discount determines the implied market value.

€2.5bn

2031 NAV ambition

€665m

current pro forma market value

NAV growth creates value.
A lower discount adds upside.

Illustrative, in EUR; constant pro forma shares; excludes dividends. RON 33.20 at 8 Sep 2026 close; EUR/RON 5.25.

46.4% DISCOUNT TO NAV | UNCHANGED

~2.0× market value | €1.34bn

30% DISCOUNT TO NAV

~2.6× market value | €1.75bn

20% DISCOUNT TO NAV

~3.0× market value | €2.00bn

0% DISCOUNT TO NAV | AT PAR

~3.8× market value | €2.50bn

NAV growth drives value. A lower discount can amplify it.

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One Income Properties: visible value, recurring income

A dedicated rental platform: clearer property values and predictable rental cash flow

THE INVESTMENT CASE

One **United** Properties remains a growth company.
One **Income** Properties is designed to distribute.

7-8%
target annual cash distribution

+3-5%
target annual NAV growth

For ONE: clearer rental asset values and steady cash flow from rents.

35% **TARGET LTV** **Debt / gross asset value**

Targets depend on structure, approvals and markets.

PROPOSED INITIAL SCALE | END-2026

c. €575m initial GAV | c. €300m pro forma NAV including minorities

GROUP RENTAL PLATFORM | END-2026

195k sqm GLA | 96% leased / pre-leased | 6.9-year WAULT
€40.5m annualized headline NOI

PROPOSED INITIAL PERIMETER

- One Tower
- One Cotroceni Park Office 1
- One Cotroceni Park Office 2
- One Victoriei Plaza (Intesa HQ)
- One Technology District (Infineon Technologies HQ)
- One Gallery
- Bucur Obor

SCALE LOOP

CONSOLIDATE → RAISE CAPITAL → ACQUIRE → REPEAT

The Group rental platform metrics (GLA, leasing, WAULT and NOI) include Eliade Tower and Mondrian Hotel, which are outside the proposed initial One Income Properties perimeter.

Built under the current legal framework. REIT legislation would accelerate the strategy, not enable it.

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Affordable housing opens a new, scalable growth market for ONE

ONE CITY DISTRICT | BUCHAREST — bringing ONE's development standards to a broader residential market

Masterplan by Jean-Michel WILMOTTE, PARIS — world-renowned architect

21 ha	~3,200	~322k sqm	~8,000
URBAN REGENERATION SITE	PLANNED HOMES	TOTAL BUILT AREA	FUTURE RESIDENTS

ONE QUALITY AT GREATER SCALE

Standardisation, placemaking and execution discipline support a broader, more affordable residential offer.

A MUCH LARGER MARKET

We believe this market is much larger than the high- and very-high-income segment.

A COMPLETE COMMUNITY

Homes, commerce, services, public space and a school for ~450 students.

A PLATFORM FOR NATIONAL GROWTH

Significant growth potential in Bucharest and Romania's major cities.

FASTER CAPITAL RECYCLING

Shorter capital cycles can support greater scale and higher annualised equity returns (IRR).

One City District — original concept masterplan

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US partnerships add promote income to development returns

Selective co-investment with local partners, plus a carried share of investor profits

ONE LIBERTY PIKE | FRANKLIN, TENNESSEE

c. $12m estimated equity investment, fully funded by ONE.
Scale as execution and returns meet our standards.

12.87 acres
LAND OWNED and UNDER CONTRACT
c. 52k sqm

60+
PREMIUM QUALITY HOMES

200k+
BUILDABLE SQ FT
c. 18.5k sqm

$110m
GROSS DEVELOPMENT VALUE
One Liberty Pike

Illustrative concept only; not a photograph or final project design.

25–30% target equity IRR on ONE's investment

Advanced negotiations to acquire adjacent plots of c. 1.75ac and expand the development.

Indicative structures and targets; subject to definitive agreements, waterfalls, approvals and market conditions.

MIAMI, FLORIDA

FORTUNE INTERNATIONAL GROUP

Intended partnership with Fortune International Group

c. $44m estimated equity investment | Residential tower (condominiums)
c. 1/3 ONE equity + c. 2/3 co-investor equity

23% expected promote on co-investor profits

NASHVILLE, TENNESSEE

Intended partnership with a reputable US developer

c. $21m estimated equity investment | Residential tower (condominiums) + hotel
c. 1/3 ONE equity + c. 2/3 co-investor equity

20%-30% expected promote on co-investor profits

A NEW PROFIT LINE

Development return
+
Promote on investor profits

ONE's carried share of investor profits under the agreed waterfall can scale earnings with less capital per project.

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Five years listed:
How going public strengthened our balance sheet and set the foundations for the next growth cycle

Financial Update by
Cosmin Samoila, Chief Financial Officer
One United Properties

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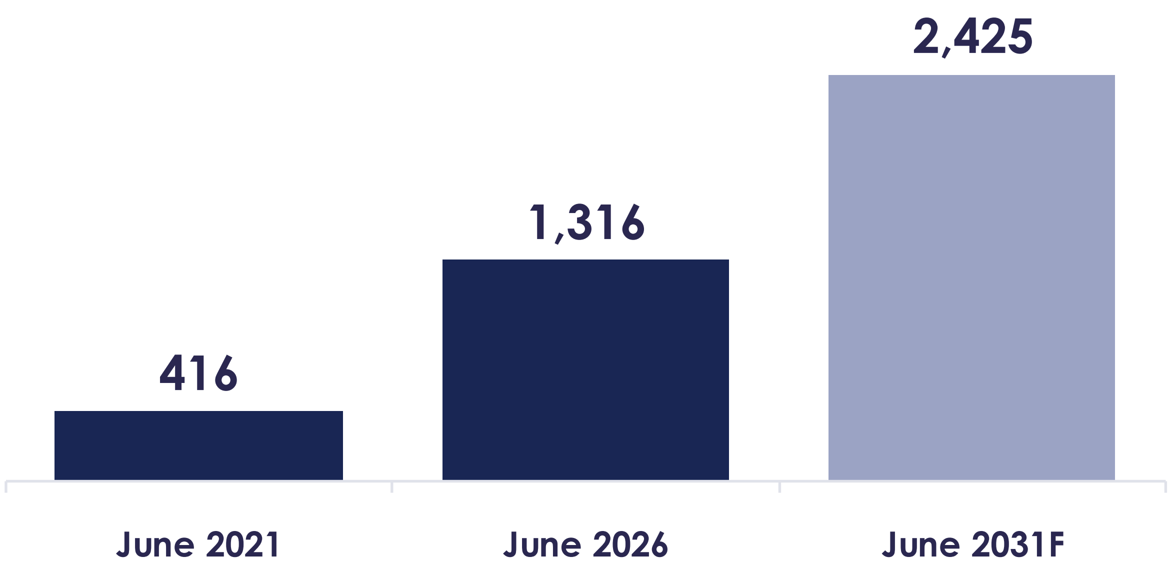
IFRS assets: five years of growth, with more ahead

IFRS total assets, EUR million | historical results and 2031 management ambition



EUR 2.036bn

adjusted assets under control, including minorities
30 June 2026 | management estimate, non-IFRS

3.2x

IFRS total assets growth
June 2021 → June 2026

25.9%

IFRS assets CAGR
2021–2026

RESIDENTIAL PORTFOLIO - UNITS UNDER CONSTRUCTION

June 2021: 955 units | June 2026: 3,939 units | June 2031F: over 6,000 units

GROUP RENTAL PLATFORM - CURRENT SCALE AND AMBITION

H1 2026: 152k sqm standing | End-2026F: 195k sqm, EUR 40.5m annualized NOI | 2031 ambition: >300k sqm, >EUR 1bn

IFRS: EUR 1.316bn at H1 2026. Adjusted assets use a separate valuation basis. Source: ONE H1 2026; 2031 is a management ambition.

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IFRS equity growth and the adjusted NAV today

Owners' equity, EUR million | historical balances and a separate 2031 ambition

EUR 1.240bn

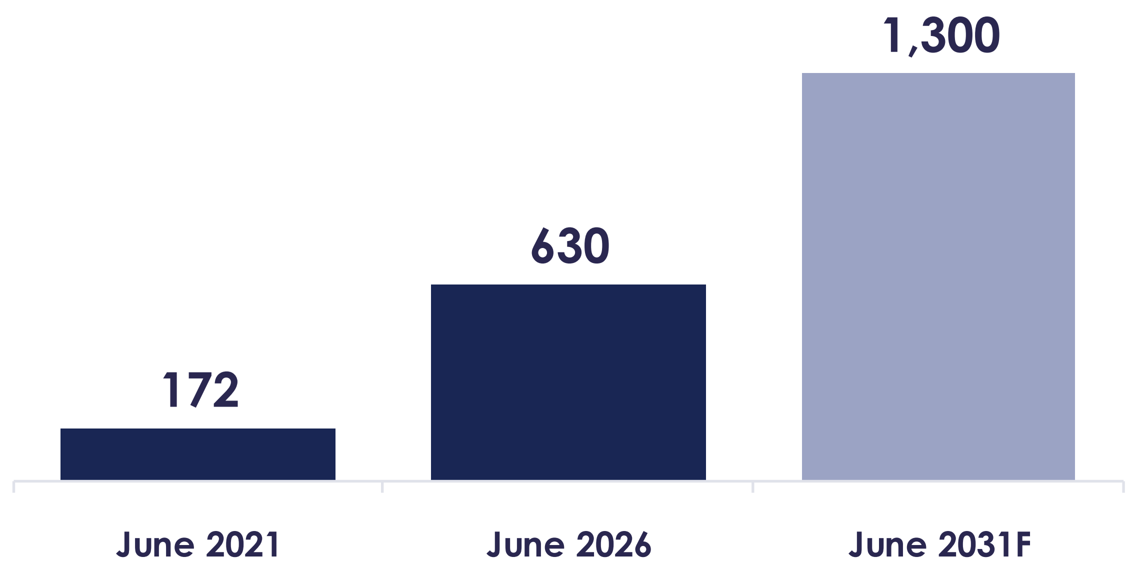
adjusted NAV attributable to owners, 30 June 2026; management estimate, non-IFRS

3.7x

IFRS owners' equity growth June 2021 → June 2026

30%

IFRS equity CAGR 2021–2026



SHARE CAPITAL OPERATIONS - JUNE 2021 TO JUNE 2026

IPO: EUR 52.6m | SPO 2022: EUR 51.5m | SPO 2024: EUR 68.3m | Total: EUR 172.4m

GROSS DIVIDENDS - JULY 2021 TO JUNE 2026

EUR 77.7m distributed; historical value-growth methodology excludes buybacks and PTO.

2031 equity depends on profit attributable to owners, dividends, capital contributions and other equity movements; it is distinct from adjusted NAV.

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Cash collections, liquidity and the 2026–2027 timing gap

Published cash baseline, scheduled collections and the expected recovery of deferred recognition

EUR 70.7m

cash at 30 June 2026, before the July PTO

EUR 445m

contracted future gross collections through 2029

EUR 43.7m

bank principal due in 1 year, as at 30 June

CONTRACTED COLLECTIONS - SCHEDULE AT 30 JUNE 2026

2026: EUR 150m | 2027: EUR 165m | 2028: EUR 85m | 2029: EUR 45m
Gross inflows: existing contracts, before completion costs, interest, taxes and distributions.

THE 2026–2027 TIMING GAP

2026: net profit expected 15–20% below original budget.
2027: deferred recognition expected mainly as backlog clears.

LIQUIDITY PRIORITIES

Funding: match project drawdowns with remaining build costs.
Deployment: phase new investment against collections.

WHAT RELEASES CASH

- **REGISTRATIONS**: clear the cadastral backlog and convert reservations.
- **DELIVERIES**: sign final contracts and collect the remaining price.
- **DEBT**: EUR 43.7m due in 1 year as at 30 June; rents support servicing.

Source: ONE H1 2026, pp. 20, 27, 31. Cash is a historical balance; July PTO cost RON 142.1m. Collection dates remain subject to timing risk.

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EUR 440m cumulative profit generated in the last 5 years

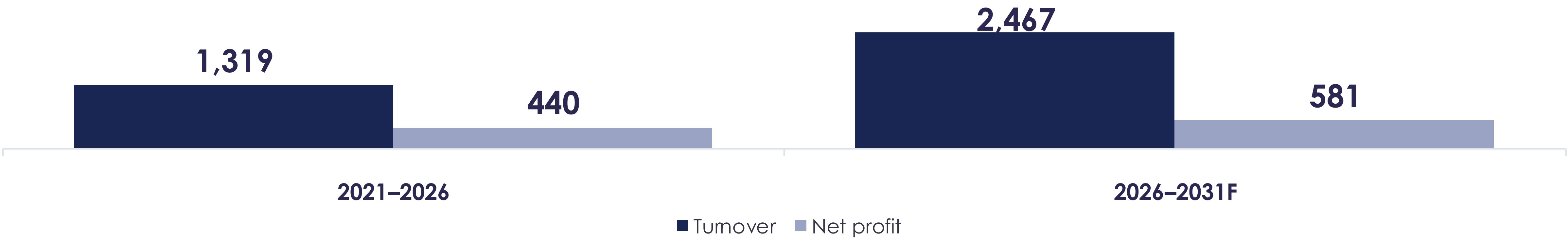
Cumulative performance in EUR million | 2021–2026 delivered and 2026–2031 management forecast

2.6x
cumulative profit / EUR 172.4m of equity raised

33.3%
net profit margin 2021–2026

~18%
annual average return on equity 2021–2026

~10%
annual average return on assets 2021–2026



DELIVERED - JUNE 2021 TO JUNE 2026

EUR 1.3bn turnover | EUR 440m net profit | EUR 362m after gross dividends (rounded)

2026–2031 MANAGEMENT FORECAST

EUR 2.5bn turnover | EUR 581m net profit | 24% net margin

Forecast profit is not free cash flow or an equity bridge: dividends, minority allocations and other equity movements also affect equity.

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From residential developer to diversified real-estate group

Product and geographic diversification | rental and tenant-service revenue reached 19% of H1 2026 turnover

19%
Rental and tenant-service revenue / H1 2026 turnover

4
asset classes – residential, office, retail, hospitality

5 + 1
markets with assets, plus Miami as a target market

THE SHIFT

2021: residential-led developer, with rental income below 1% of turnover
H1 2026: rental and tenant-service revenue reached 19%, supporting recurring earnings.

PRODUCT DIVERSIFICATION

Income-producing: office, retail and hospitality assets held for rent
Residential: premium segment extended into the middle market

GEOGRAPHIC EXPANSION

Romania: Bucharest, Sibiu, Iași and Constanța
United States: Nashville assets; Miami partnership intended.

WHAT IT CHANGES

- **EARNINGS**: recurring rental revenues together with development profits
- **MARKET**: a broader buyer base in the middle market
- **EXPOSURE**: spread across Romanian regional cities and the US

Source: One United Properties

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Expanding the addressable market without compromising on quality: How One United Properties grows its residential business

Segment Update by
Beatrice Dumitrascu, CEO Residential Division
One United Properties

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Five years back, five years forward

The residential platform, side by side - 2021 versus 2026

2021 – AT IPO

€0.94bn
Residential portfolio GDV

483k sqm
Built or under construction

1 city
Bucharest only

5 YEARS

2026 – TODAY

€4.5bn+
Residential portfolio GDV

~1.09m sqm
Built or under construction

5 + 1 markets
Bucharest, Constanța, Sibiu, Iași, Nashville; Miami is a target.

EUR 1.05bn in sales, pre-sales and reservations since IPO across 3,595 units
H1 2026: EUR 106.1m across 229 units; average price +24% YoY, mainly reflecting project mix.

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Expanding the addressable market

From boutique developer to city-scale platform, without compromising on quality or margins

A structural deficit of ~200,000 units: the middle-income segment is where ONE extends next.

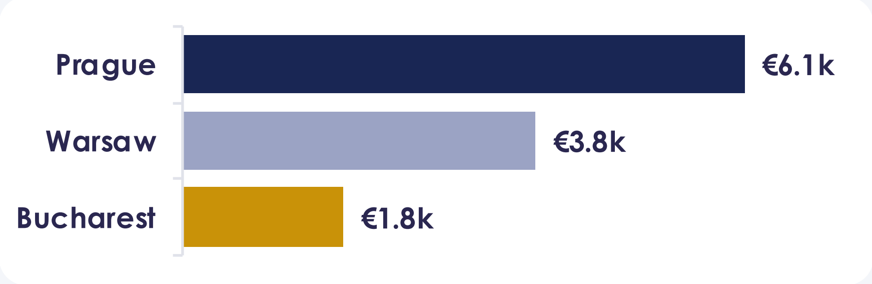
44.7%

of Bucharest deliveries in 2025 came from the middle segment - its highest share in five years

94.3%

home ownership rate - the highest in the EU, with only ~7% of the working population holding a mortgage

PRICE PER SQM - BUCHAREST VS. PEERS



FROM BOUTIQUE TO CITY SCALE

From 14 units in 2014 to One Cotroceni Park and One Lake District. One City District extends the platform: 21 ha, approximately 3,200 homes, 322k sqm total built area and 8,000 future residents. Scale and standardization bring ONE quality to a broader market.

PRICING ACROSS SEGMENTS

Premium: ~120-180% of market-average pricing | High-end: ~200% | Luxury: ~400%
The group strategy now extends this into the medium-income segment, while preserving margins.

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Without compromising on quality

Green by default, delivered on time, and margins preserved while scaling

100%

GREEN HOMES CERTIFIED

of residential developments delivered since 2017; new developments target LEED Zero Carbon.

15	residential developments delivered to date (€774m GDV), consistently on time
35%	Minimum gross margin per development
75%	of units under construction contracted at 30 June 2026; H1 average price +24% YoY, mainly reflecting project mix.

FT FINANCIAL TIMES

#1 in Romania, #9 in Europe: Financial Times & Statista 2025 ranking of ten-year compound revenue growth.

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10,775 units in planning, €2.37bn of future GDV

Pipeline and the next five years - landbank, launches and cash-flow visibility

€2.37bn

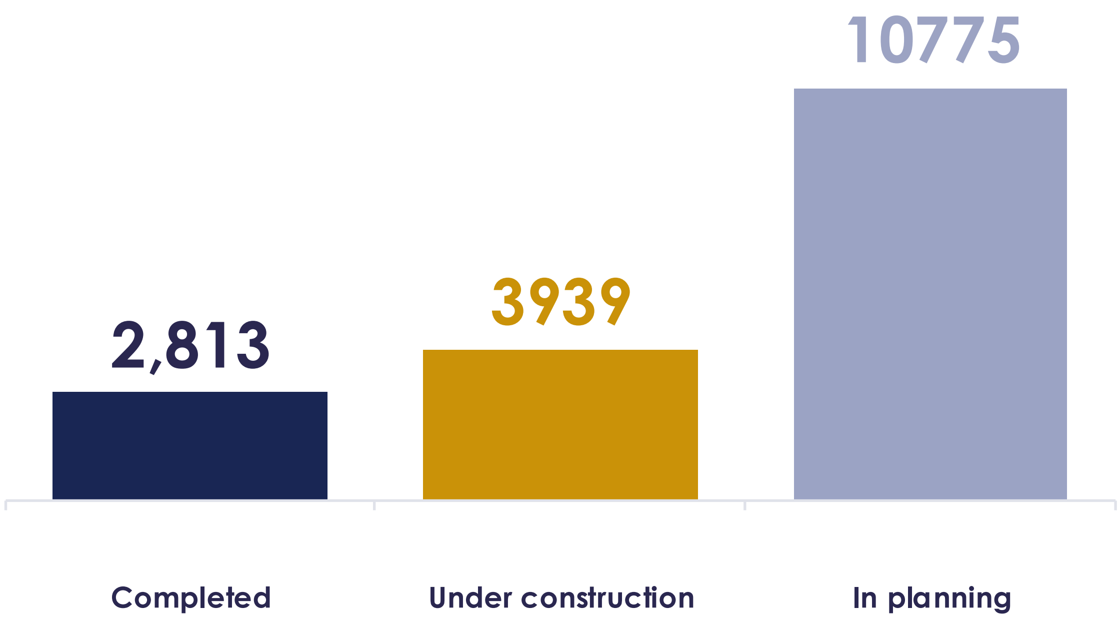
GDV in planning on 285,000+ sqm of land (988,000 sqm GBA), with capacity for over 10,000 apartments

3,939

units under construction (GDV €1.3bn), of which 2,562 are scheduled for delivery in 2026 - the biggest delivery year to date.

EUR 445m

future gross collections from contracts at 30 June 2026, scheduled through 2029



A NEW GENERATION LAUNCHING IN 2026 & 2027

- One Floreasca Club
- One Cotroceni Towers
- One Park Lane
- One Riverfront (Sibiu)

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One Floreasca Club

A new chapter for the ONE Floreasca series launches tomorrow

One Floreasca Club opens for sale on September 12. Launch reservations establish demand and collection visibility; payments follow the contractual schedule, with the balance collected at later milestones and delivery.

The product: 211 boutique low-rise residences in three buildings, plus 10 ground-floor commercial spaces - part of the ONE Floreasca series, between the lake and the park, next to One Mircea Eliade, One Verdi Park and One Floreasca Sunset.

Estimated GDV of €75.9m: 18,315 sqm of residential across 211 homes, 926 sqm of ground-floor commercial and 294 parking spaces, with delivery scheduled for Q1 2029.

211 exclusive boutique residences, in three low-rise buildings.

One Floreasca Club - concept rendering

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Building an office business from scratch: The next chapter

Segment Update by
Mihai Paduroiu, CEO Office Division
One United Properties

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THE OFFICE STORY AT IPO

June 2021 snapshot: the office portfolio as presented in the IPO prospectus from June 2021

ONE TOWER	ONE COTROCENI PARK	ONE NORTH GATE
24k sqm GLA	**81k sqm** GLA	**22k sqm** GLA
61% leased | completed	**63% leased | under construction**	**Under redevelopment | acquired**

The IPO plan included development and redevelopment assets; portfolio income at IPO was below EUR 2m.

THE INVESTMENT CASE, AS PRESENTED AT IPO

INTENT

The office portfolio was a key pillar of IPO strategy, intended to complement the residential business with stable, recurring rental income from Class A office assets.

STRATEGY

Management planned to keep growing the portfolio of premium offices, as demand would eventually rise post-Covid and corporate occupiers would focus on quality, sustainability and integrated amenities.

BOLD OBJECTIVE

The case: create a large, institutional-quality Class A office portfolio of roughly **129k sqm**, anchored by One Tower and One Cotroceni Park, built to generate predictable recurring income and long-term asset appreciation.

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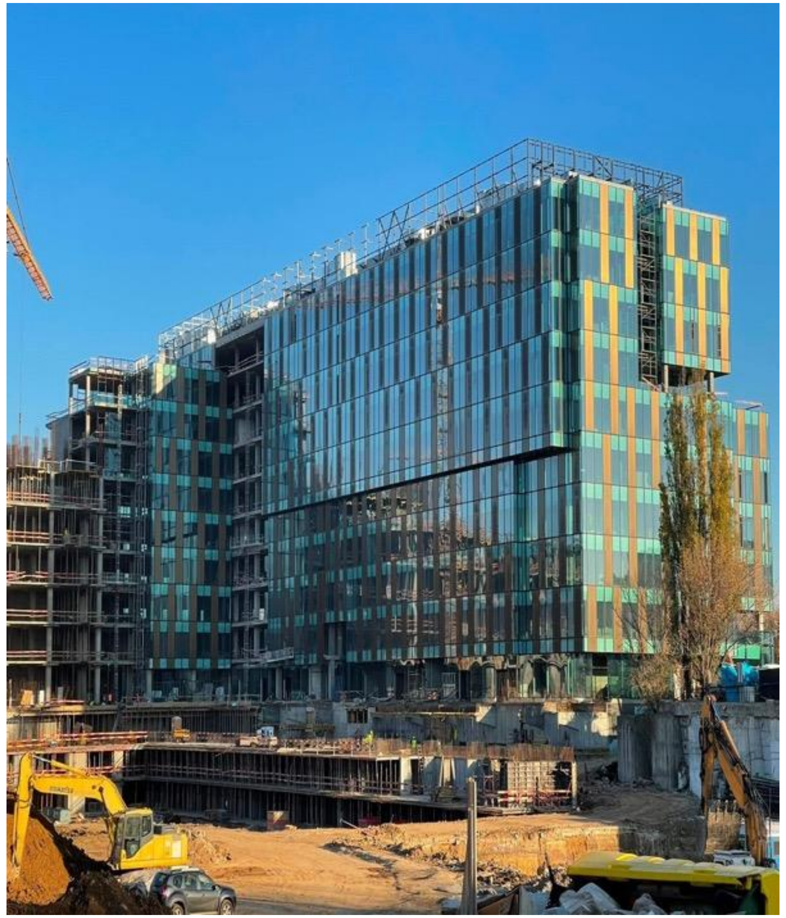
BUILDING THE OFFICE PLATFORM

Archive images from the development of the initial office portfolio

One North Gate



One Cotroceni Park

One Floreasca City

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RENTAL INCOME TODAY, WITH GROWTH INTO YEAR-END

Group rental platform | H1 2026 baseline and end-2026 expectations

Standing portfolio at H1 2026:
152k sqm GLA | 95% leased | 93% occupied | EUR 28.6m annualized headline NOI

195k sqm	96%	c. €40.5m	6.9 years
GROUP GLA BY END-2026	**LEASED / PRE-LEASED**	**ANNUALIZED HEADLINE NOI**	**WAULT BY YEAR-END 2026**
Including the developments due for completion	End-2026 portfolio, including pre-leases	Expected at end-2026; not period cash receipts	Expected end-2026 portfolio

Group scope: KPIs include Eliade Tower and Mondrian; **One Income Properties has a separate initial perimeter.**

ASSET LEASING - MANAGEMENT UPDATE

- One Tower | **fully let**
- One Technology District (Infineon BTS) | fully leased / pre-leased
- One Gallery | fully leased / pre-leased
- One Cotroceni Park Office Phase 1 & 2 | **fully let**
- One Victoriei Plaza (Intesa Bank HQ) | **fully let**
- Bucur Obor | 90% leased (management update)

Lease commitments and physical occupancy are different measures. Asset updates above are from the Investor Day management deck.

H1 2026: 5,000 sqm leased / pre-leased and 320 sqm renewed. Source: ONE H1 2026 report, rental portfolio section.

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THE PORTFOLIO TODAY

Core properties in the recurring-income platform

One Cotroceni Park

One Tower

One Gallery

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ONE INCOME PROPERTIES AND THE 2031 AMBITION

Clearer rental asset values, recurring cash flow and a platform for disciplined growth

AT IPO | 2021	ONE INCOME PROPERTIES	GROUP RENTAL | 2031 TARGET
PLANNED OFFICE PORTFOLIO GLA	PROPOSED INITIAL GROSS ASSET VALUE	RENTAL PORTFOLIO SIZE (GLA)
129k sqm	c. EUR 575m	300k+ sqm
ESTIMATED VALUE ONCE STABILIZED	PRO FORMA NAV, INCLUDING MINORITIES	GAV AMBITION | M&A + DEVELOPMENT
€289m	c. EUR 300m	€1.0bn

Initial One Income Properties perimeter: One Tower, One Cotroceni Park Office 1 & 2, One Victoriei Plaza, One Gallery, One Technology District and Bucur Obor. GAV and NAV follow the strategy presentation; Group rental KPIs cover a wider portfolio.

VISIBLE PROPERTY VALUES AND RECURRING DISTRIBUTIONS

One Income Properties is designed to make rental property values more visible and turn steady rental cash flow into recurring shareholder distributions. The growth ambition is supported by disciplined acquisitions and development; targets depend on execution and market conditions.

Thank you for joining our 2026 Capital Markets Day!

See you in 2027!

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