

# Cenomi Centers Earnings Presentation

For the period ended 31 March 2025

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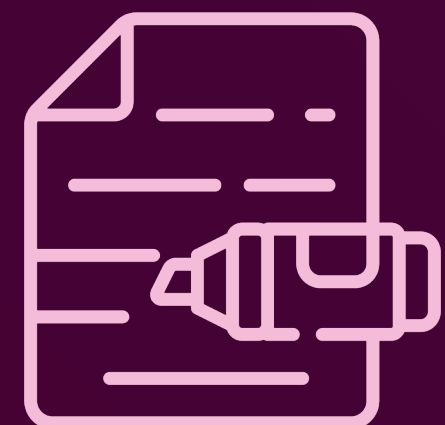
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# Q1 2025 Highlights



## Solid results with continued growth and operational excellence



### 93.1%

LFL<sup>1</sup> Occupancy

▲ 0.6pp YOY Q1-24



### SAR 590.6 m

Revenues

▲ 0.8% YOY Q1-24



### SAR 357.4 m

EBITDA

▲ 10.6% YOY Q1-24



### SAR 222.7 m

Net Profit

▲ 20.0% YOY Q1-24

▼ 5.7% YOY Q1-24 (excl. one-offs)



### 34.7 m

Footfall

▲ 9.7% YOY Q1-24

▲ 15.8% YOY Q1-24 ex Mall of Dhahran



### SAR 44.5 m

Net fair value gain on investment

▼ SAR 6.2m YOY Q1-24



### Westfield

Unibail-Rodamco Westfield

- Exclusive partnership for 10 years with option to extend for an additional 10 years



### SAR 200 mn

Equity of Baraka Fund

- Mix use development project located in Makkah

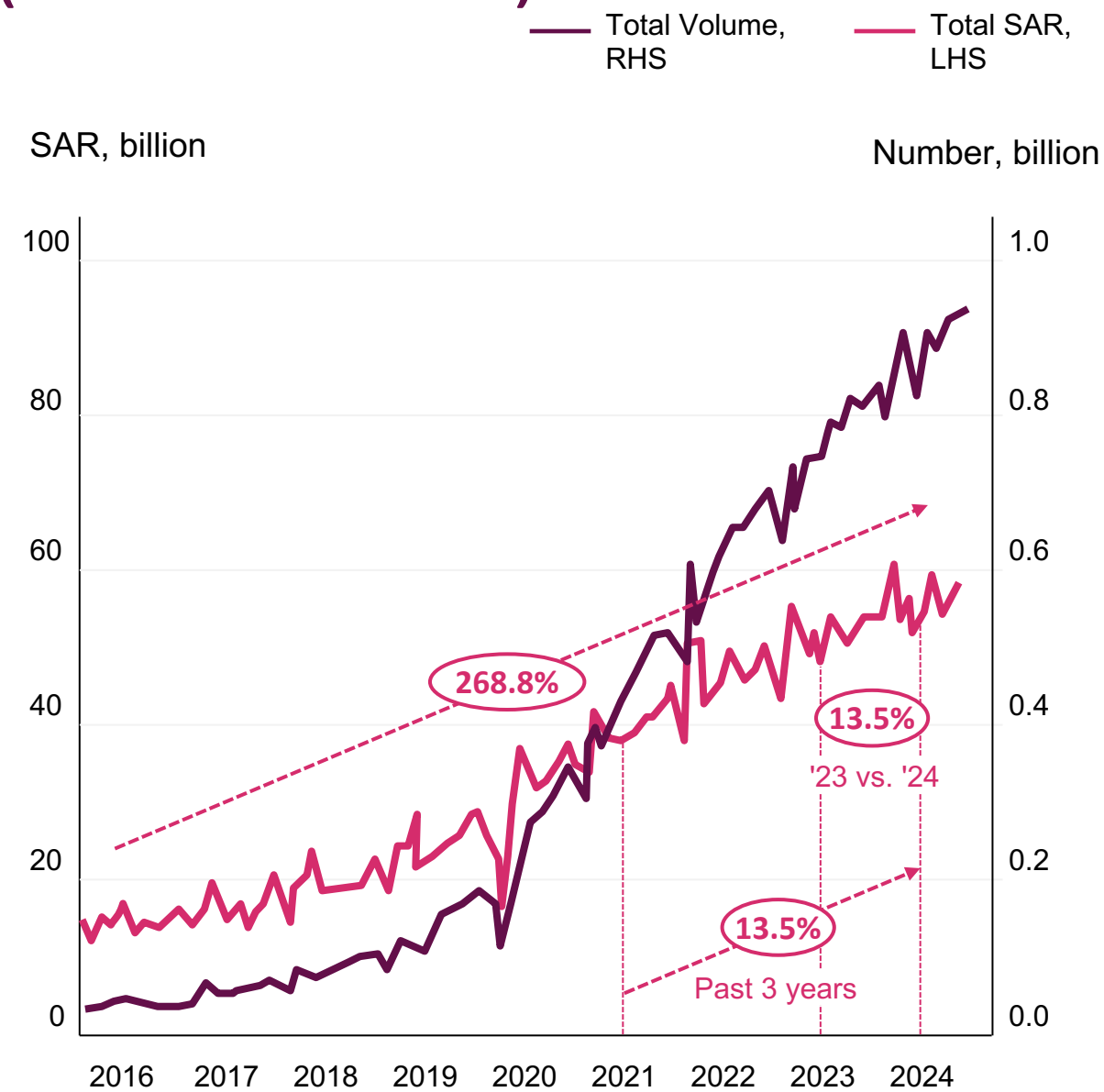


## With strong growth trends in the Kingdom's retail market



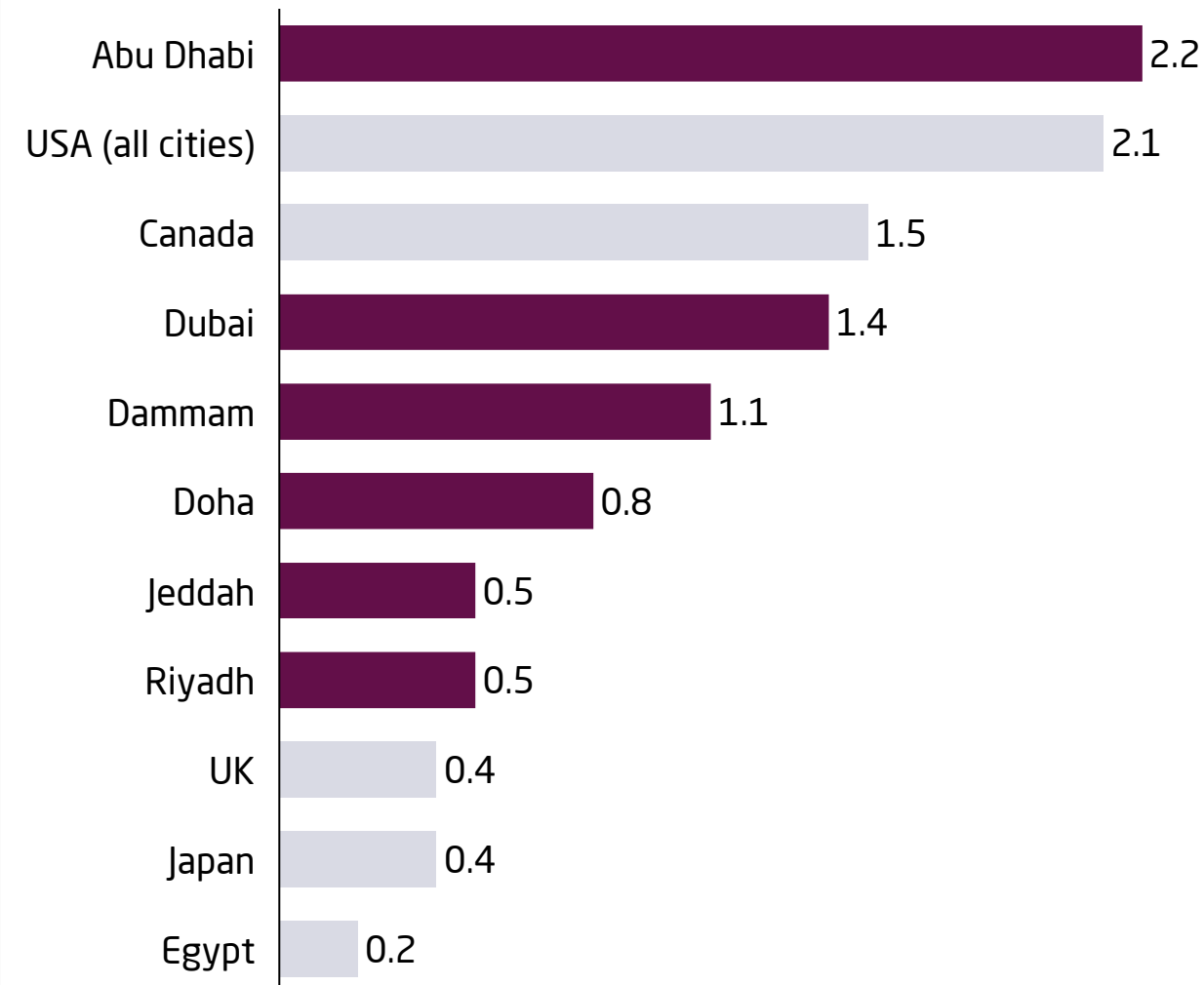
**Growth of POS transactions in the Kingdom has grown exponentially**

### Saud Arabia, Retail POS (Total Value and Volume)

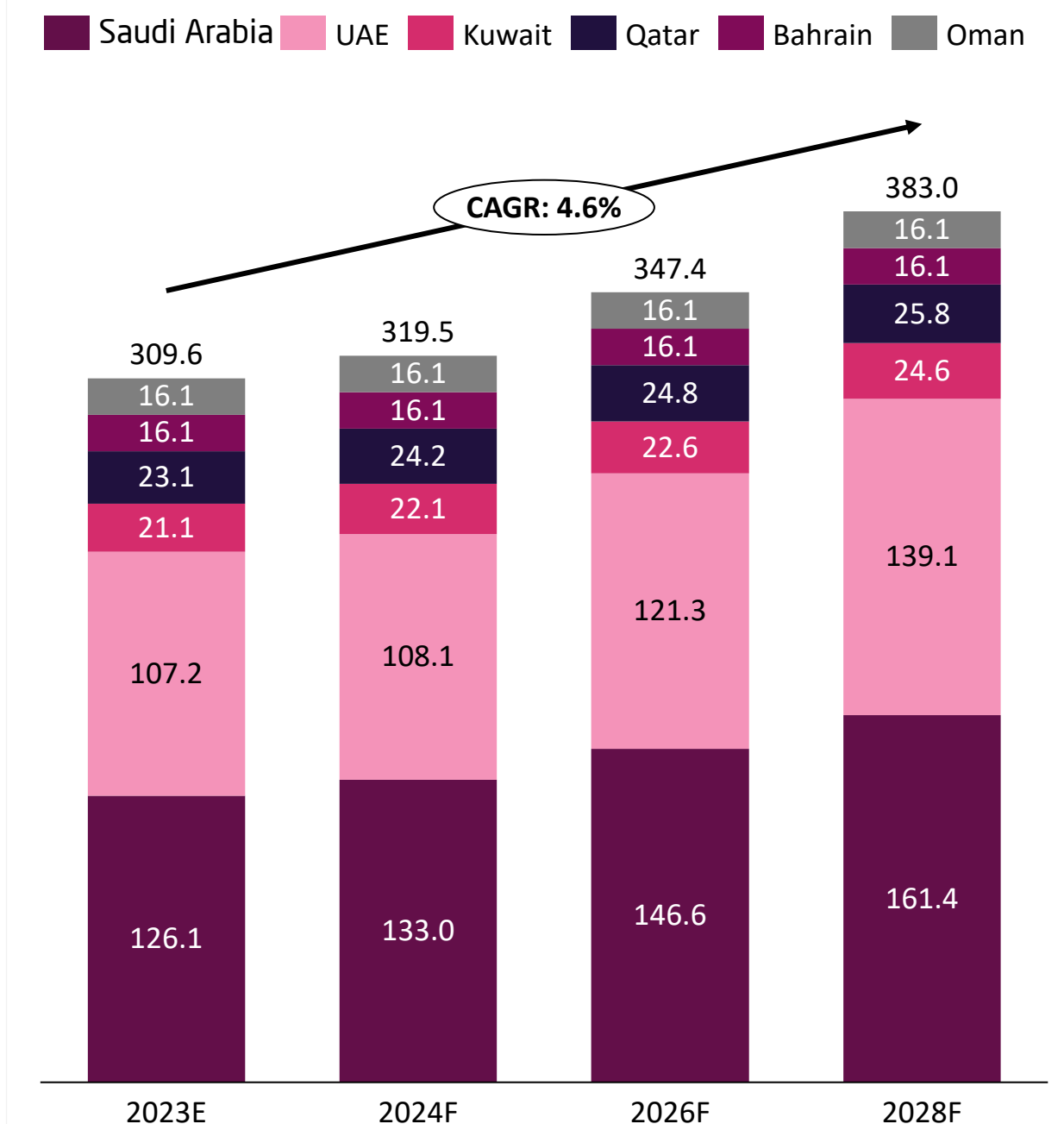


**With scope for major cities within the Kingdom poised for strong growth**

### Retail GLA per Capital (2023)



**KSA is forecasted to outperform the GCC average, with retail sales growing at 5.1%**





5 strategic pillars driving growth & business excellence



Ambition to become the largest and most admired developer and operator of lifestyle destinations in KSA and the lead interface with the Saudi consumers

5 STRATEGIC PILLARS		ACHIEVEMENTS
	Portfolio Growth	<div><div>✓</div> Jawharat Jeddah and Jawharat Riyadh are close to structural completion</div> <div><div>✓</div> Focus on portfolio profitability with handover of Mall of Dhahran</div>
	Product Excellence	<div><div>✓</div> 751 leases renewed in Q1-25, covering 150,000 sqm of GLA</div> <div><div>✓</div> 67 brands onboarded including new brands Blancpain, Breguet, Harry Winston</div>
	Operational Excellence	<div><div>✓</div> Reduced retail GLA share from 68% in Mar-20 to 62% in Mar-25 as part of tenant mix optimization</div> <div><div>✓</div> Delivered record-level quarterly footfall with 34.7 million visits in Q1-25</div> <div><div>✓</div> Proactive tenant management and focused leasing efforts enabled occupancy to reach 93.1%</div>
	Organization Enhancement	<div><div>✓</div> Prudent management of G&amp;A and Advertising Costs</div> <div><div>✓</div> Establishment of new Business Development department, accelerating non-GLA (Media and Kiosk) revenue growth in Q1-25 to 9.2% y/y</div> <div><div>✓</div> Revamped the corporate incentive program to align with business goals, drive talent productivity and retention</div>
	Sustainability Leadership	<div><div>✓</div> On track for first KSA Gold LEED certified mall developments with Jawharat Riyadh and Jawharat Jeddah</div> <div><div>✓</div> Progress on PPA with FAS Energy and Marubeni to install Solar PV system with Al Hamra Mall completed in 2024 and a further 3 malls set to complete by end of 2025</div>



# Development / Project Updates



Cenomi Centers is building its future with long-term investor returns and sustainable growth



Jawharat Riyadh

Jawharat Jeddah

Jawharat Al Khobar

3 Flagship  
Destinations



GLA ..... 220K sqm  
Outlets ..... 300+  
Expected Q2-2026

GLA ..... 104K sqm  
Outlets ..... 300+  
Expected opening Q4-2025

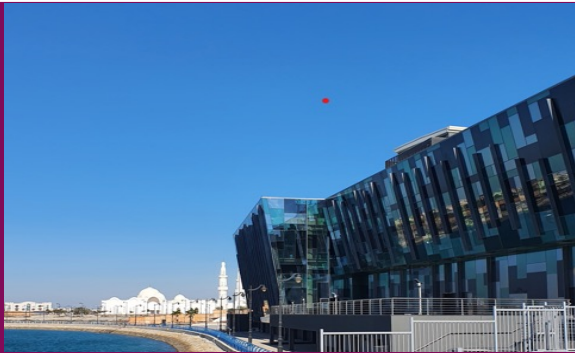
GLA ..... 100+ sqm  
Outlets ..... 380+  
Expected Opening TBD

Jubail Marina Mall

U Walk Qassim

Murcia Mall

3 Lifestyle  
Destinations



GLA ..... 30K sqm  
Outlets ..... 70+  
Expected Opening TBD

GLA ..... 60K sqm  
Outlets ..... 135+  
Expected Opening 2026

GLA ..... 45K sqm  
Outlets ..... 150+  
Expected Opening 2027

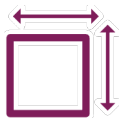




# Development of Flagship Jawharat Riyadh and Jeddah on track for completion

Jawharat Riyadh and Jawharat Jeddah are expected to contribute over SAR 650 million of EBITDA (40% of current EBITDA) upon full stabilization in 2028

## Jawharat Riyadh



**220,000 sqm GLA**  
Retail 155,000 sqm  
Prime offices 65,000 sqm



Strategically located on 3 main roads



65% of High-Income Households and 75% Mid-Income Households within a 30-min drive.



24 million+ visitors a year with a SAR 5 billion+ spend potential



300+ stores, 30+ new brands to KSA, 75+ flagship stores



First dedicated luxury precinct with Top Luxury Maisons



Unique world-class entertainment with 50+ experiences



3D immersive experience Hub with live shows every 30min



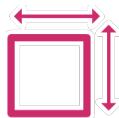
Gold LEED Mall

STRUCTURAL COMPLETION 98%

PRE-LEASING MORE THAN 80%

<sup>1</sup> Leases signed, Head of Terms agreed, and location agreed

## Jawharat Jeddah



**104,000 sqm of retail GLA**



Strategically located on 2 main roads at the busiest intersection in Jeddah



95% High-Income Households within a 30-min drive



18 million+ visitors a year with SAR 3 billion+ spend potential



300 stores, 30+ new brands to the Kingdom, 50+ flagship stores



First dedicated luxury precinct with Top Luxury Maisons



3 unique F&B zones



3D immersive experience Hub with live shows every 30min



First Gold LEED a first for malls in the Kingdom.

STRUCTURAL COMPLETION 99%

PRE-LEASING CLOSE TO 90%

<sup>1</sup> Leases signed, Head of Terms agreed, and location agreed



## Jawharat Riyadh - The number one mall in Riyadh





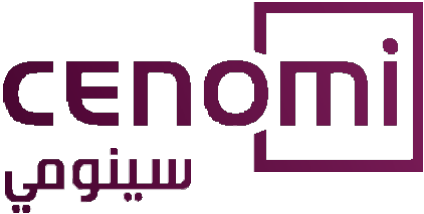
## Jawharat Jeddah - The number one mall in Jeddah







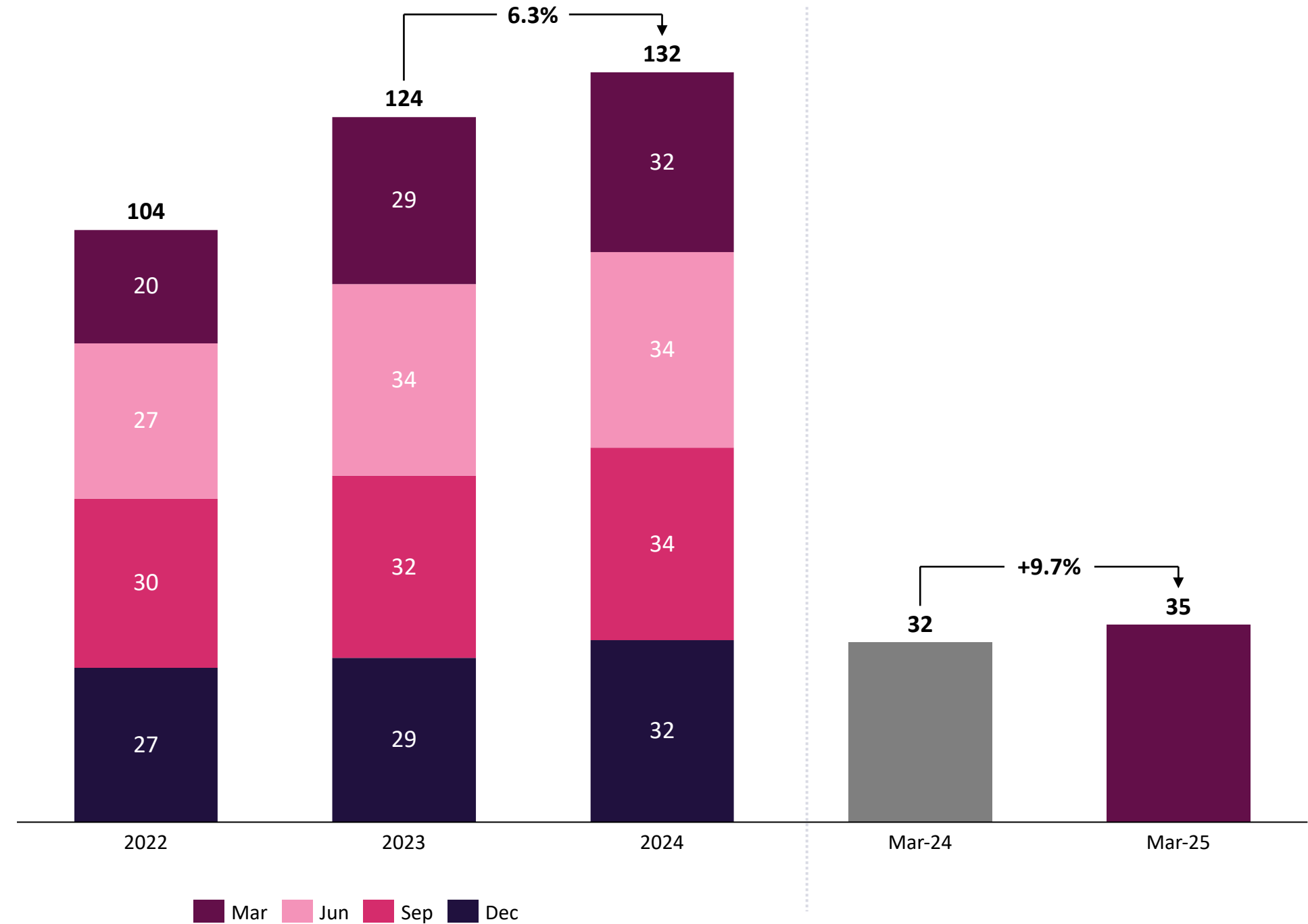
# Operating Update



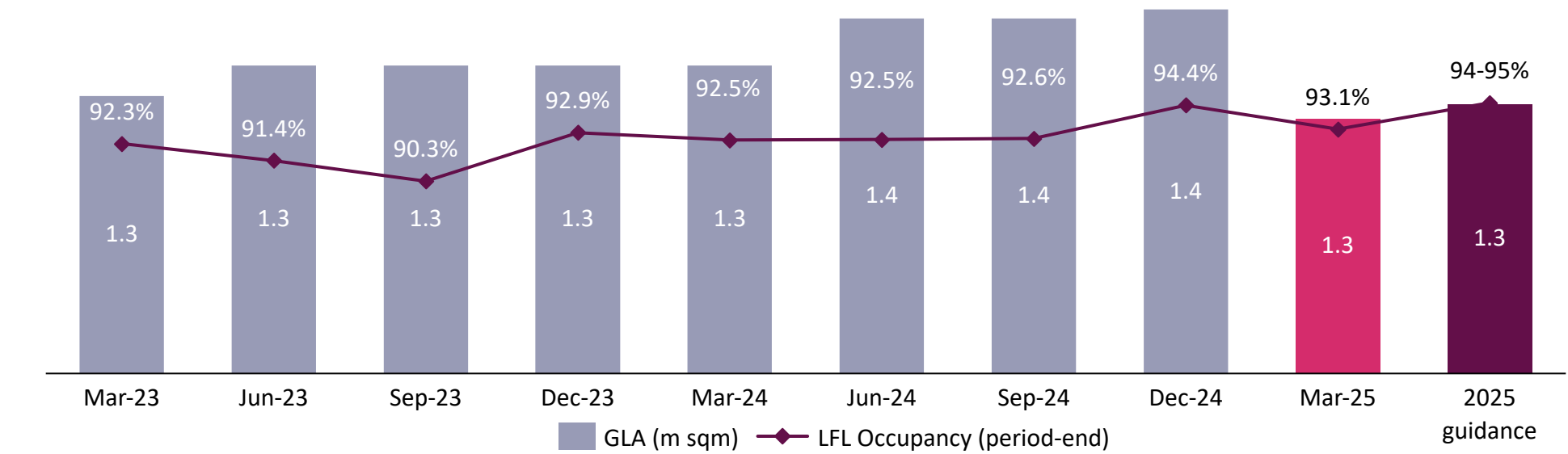
# Operational excellence

Operating performance remain robust, with high occupancy and footfall, securing long-term revenue stability within the existing portfolio

## Footfall Progression (m)

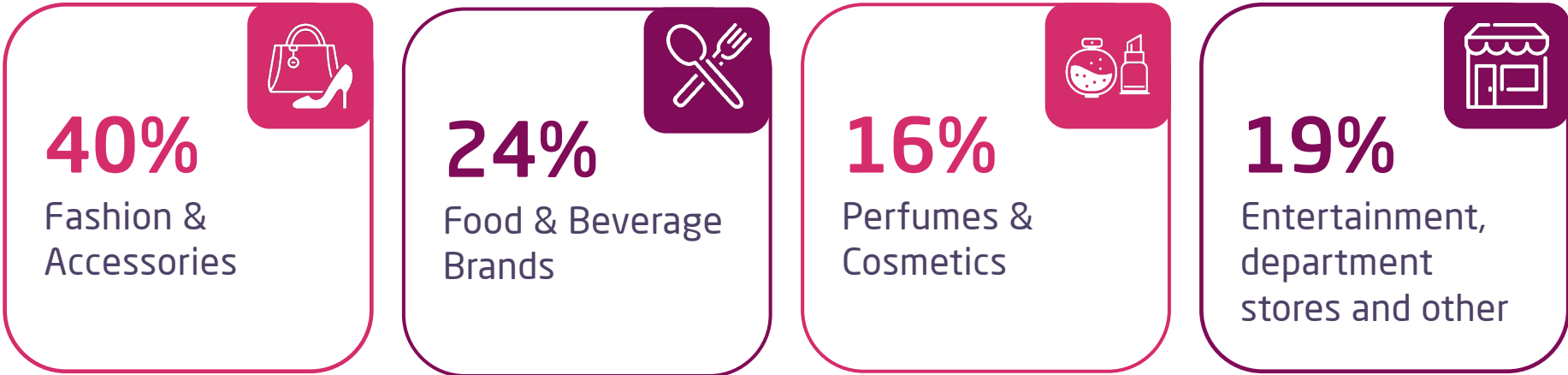


## GLA Progression vs. Occupancy Rates



## Strong Onboarding Performance

In Q1 2025, 67 brands were onboarded at Cenomi Centers' malls, including %:



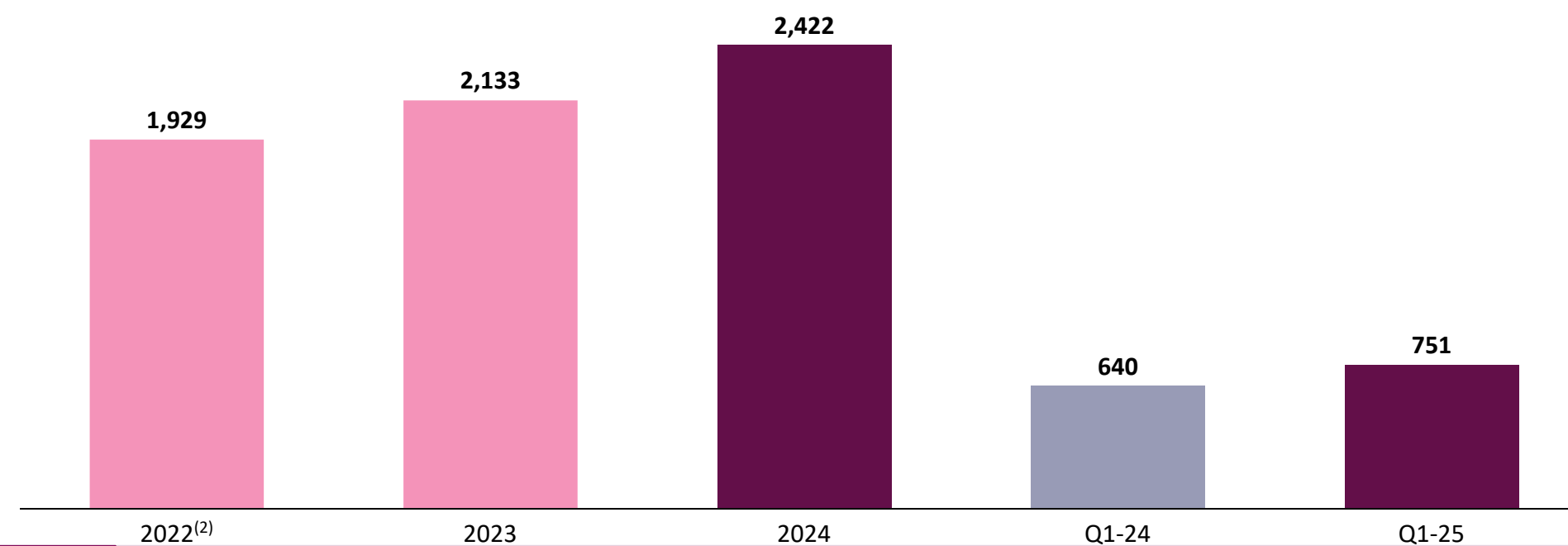


## Operational excellence

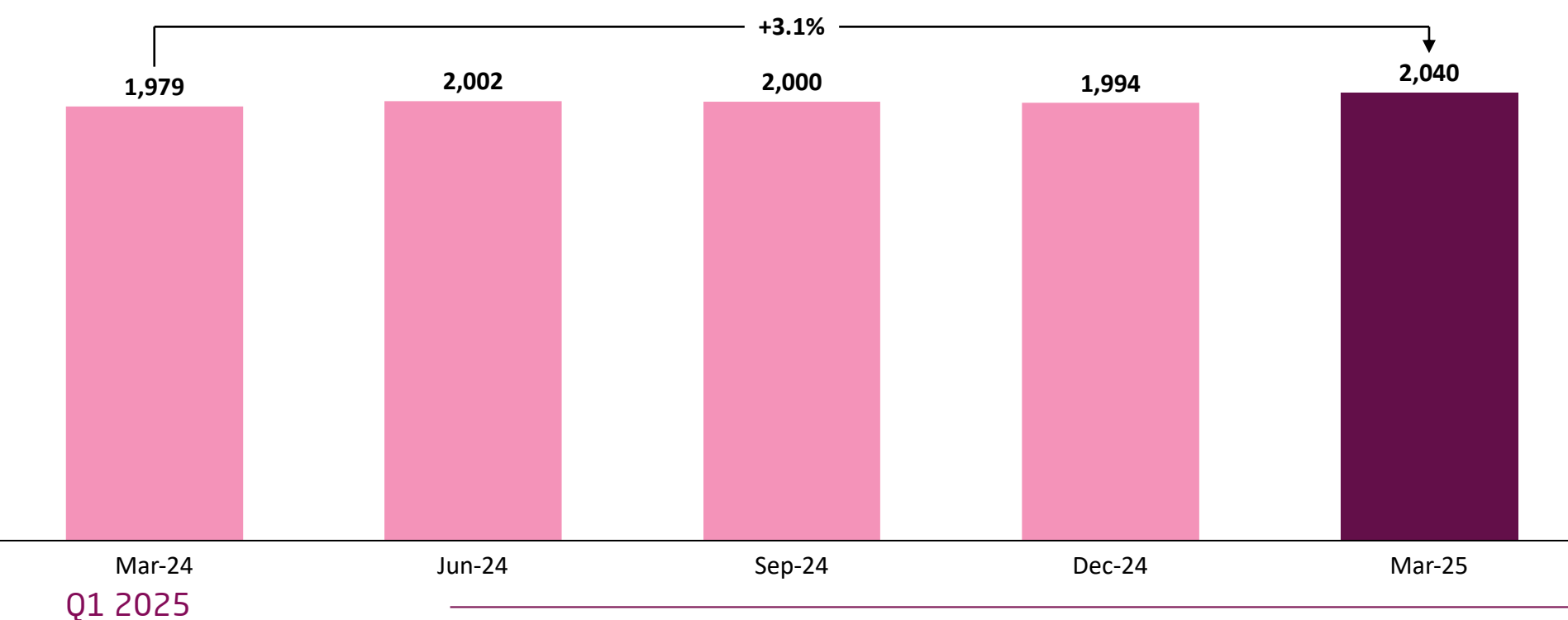
...with elevated performance across core KPIs



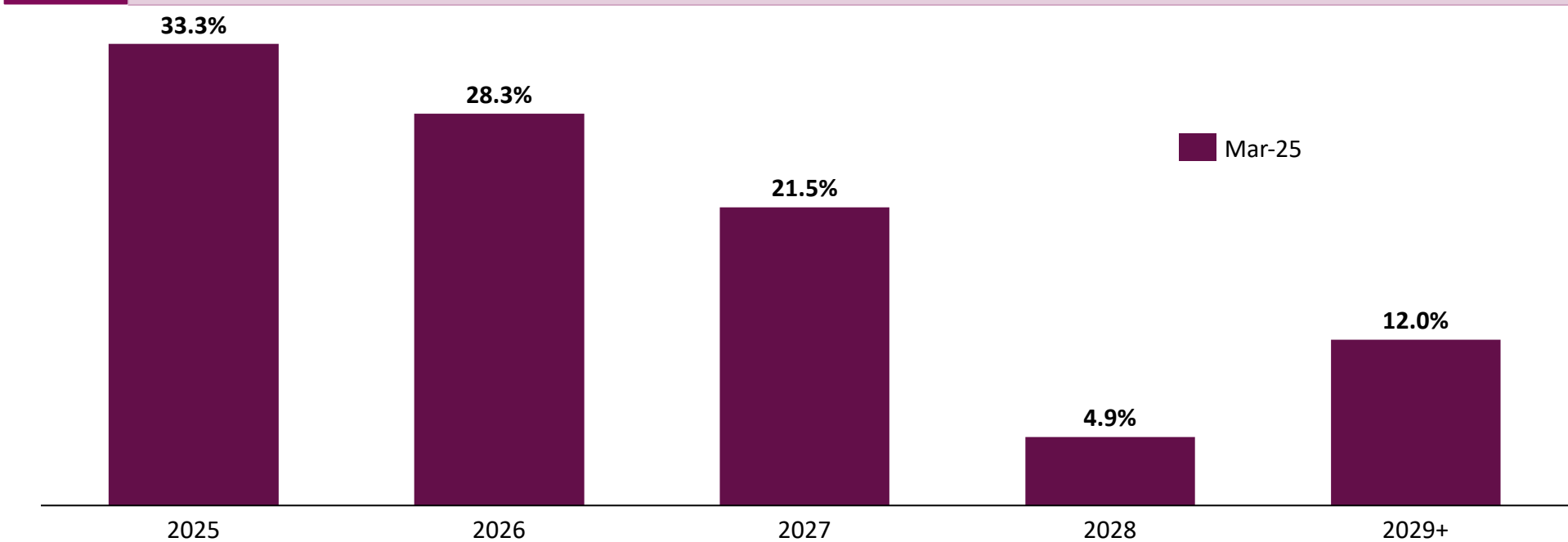
### Number of Leases Renewed <sup>1</sup>



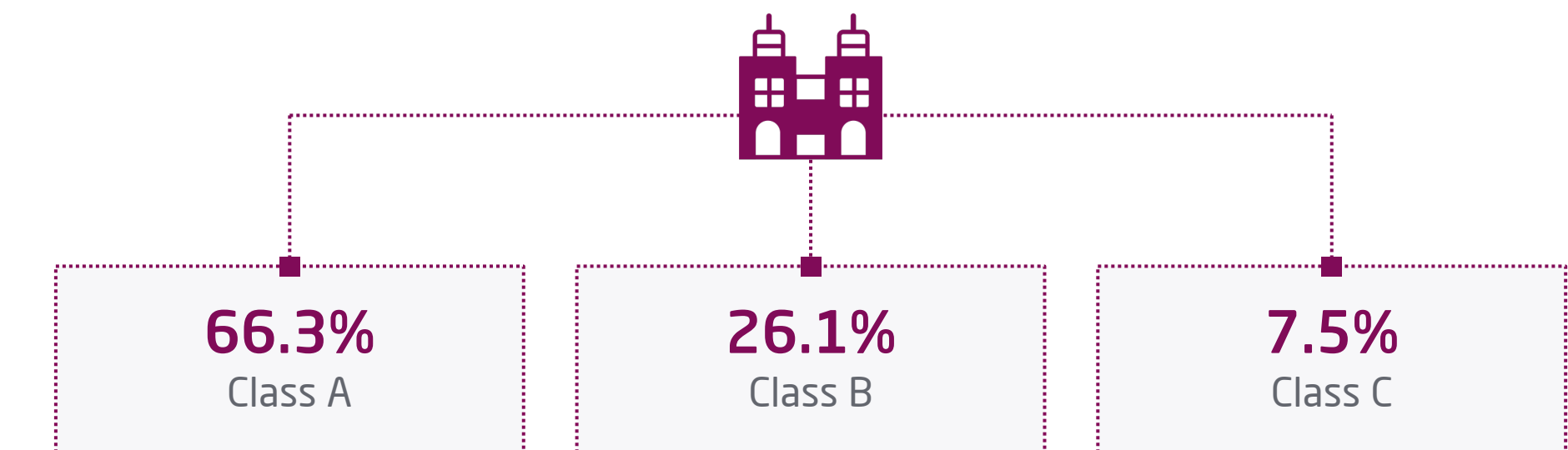
### Weighted Average Rental Revenue <sup>2</sup> (SAR per sqm)



### Year of Expiration - % of Total Rental Revenues



### Allocation of Leases Expiring in 2025 (33.3% of total rental revenue) by Mall Type



Source: Company information.

Note: <sup>1</sup> Includes all types of lease renewals (short and long-term). <sup>3</sup> Weighted average rental revenue per SQM is calculated on LFL basis, with LTM revenue excluding Media.



Low tenant concentration and top line derisking

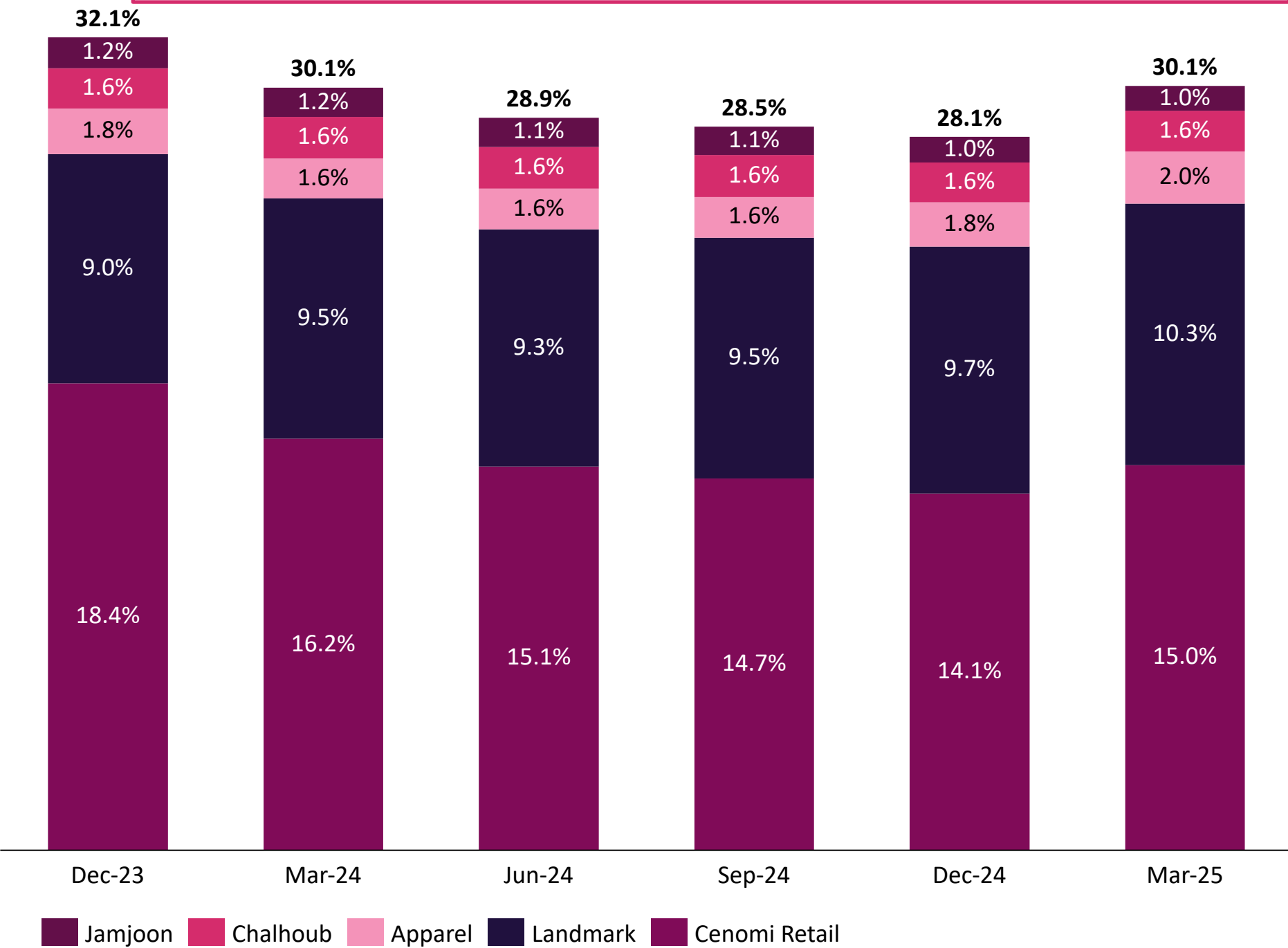
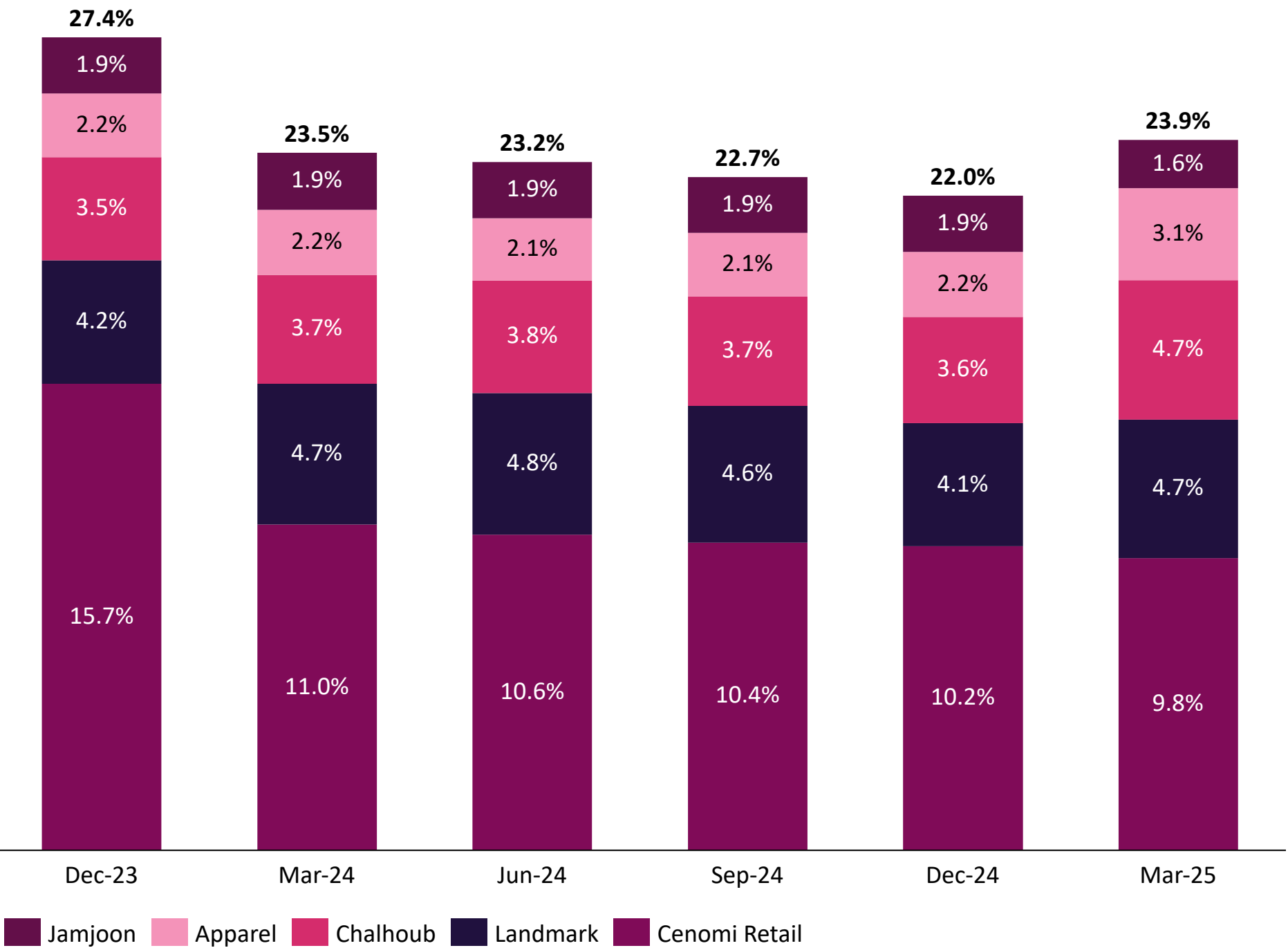


As % of Rental Revenue



As % of Period end occupied GLA

GLA occupied by Cenomi Retail has decreased from 161k in Dec 24 to 156k in Mar 25

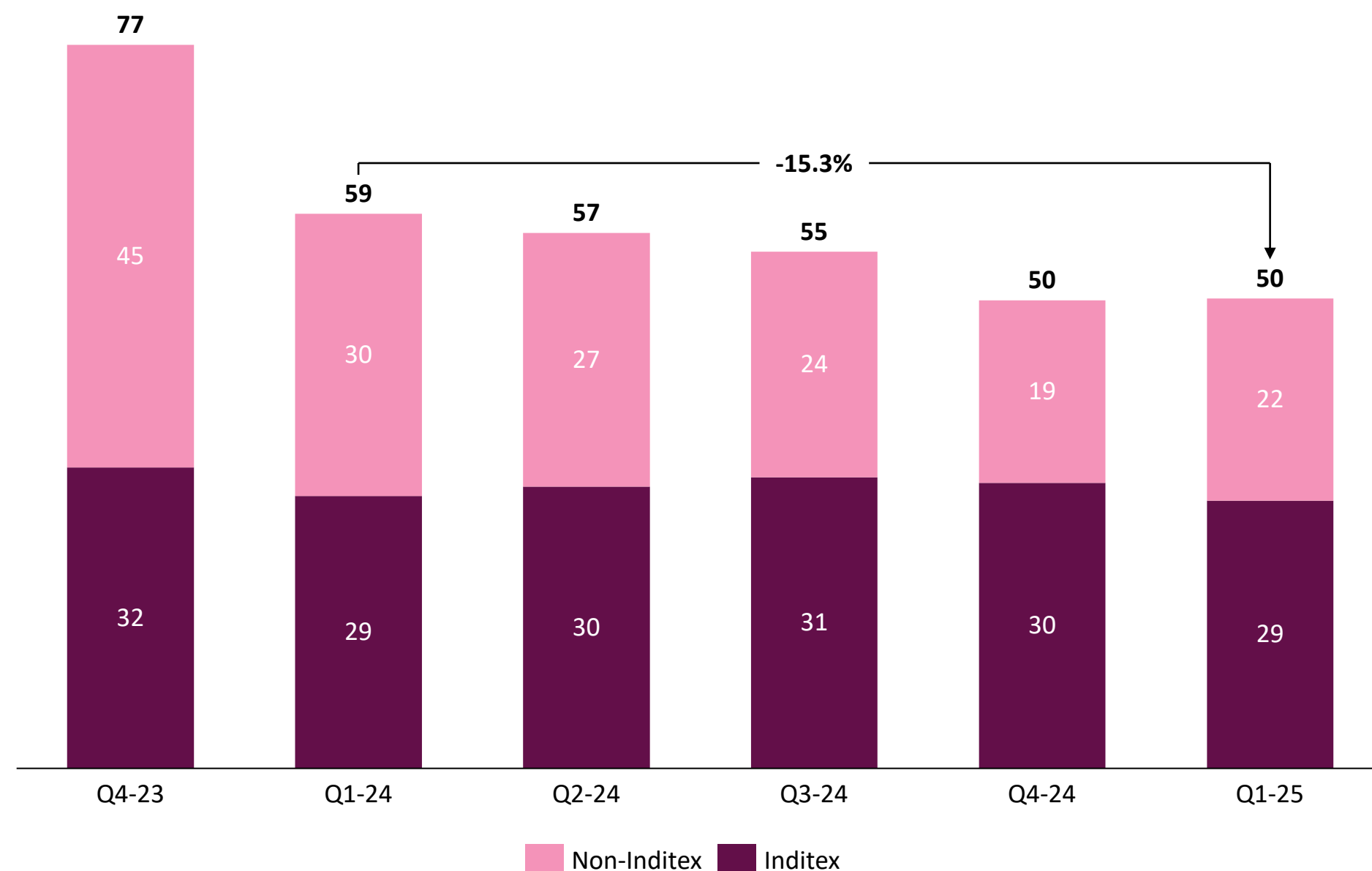




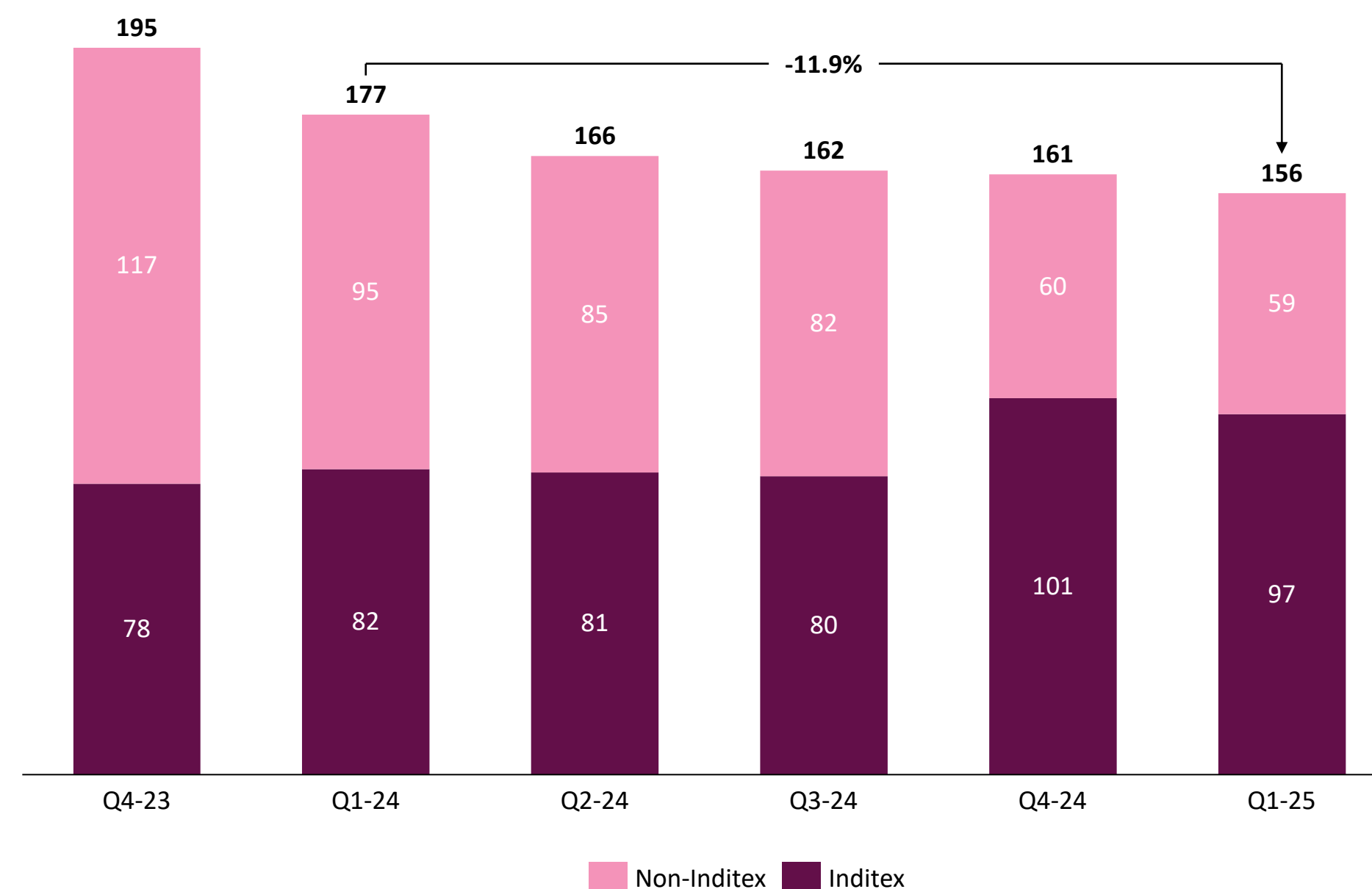
## Cenomi Retail Fashion footprint: non-Inditex brands disposals drive significant reduction in Revenue & GLA exposure while Inditex with anchor brands remains stable



### Cenomi Retail (Fashion): Rental Revenue (SARm)<sup>1</sup>



### Cenomi Retail (Fashion): Occupied GLA<sup>2</sup> (SQM)





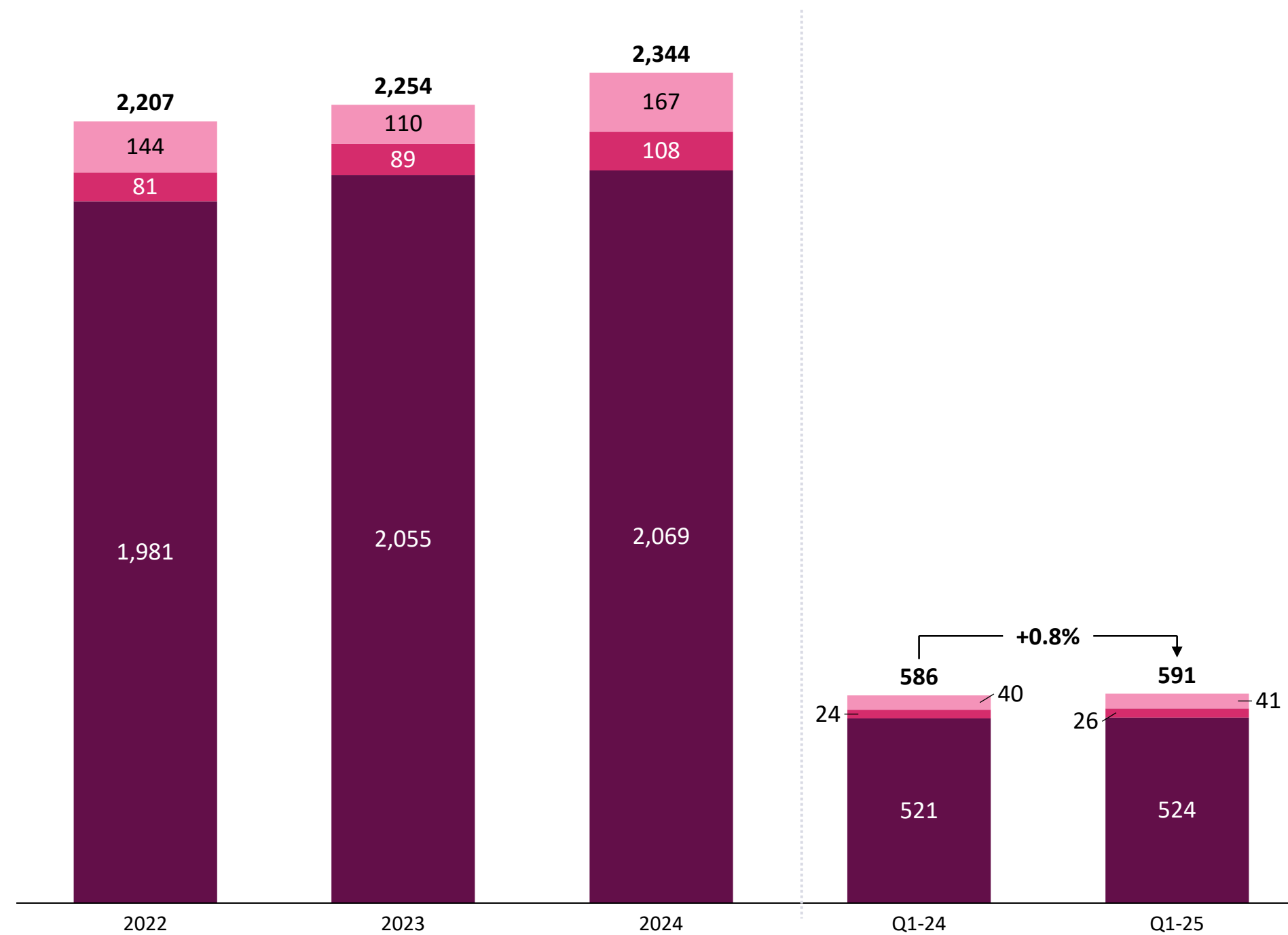
# Financial Update



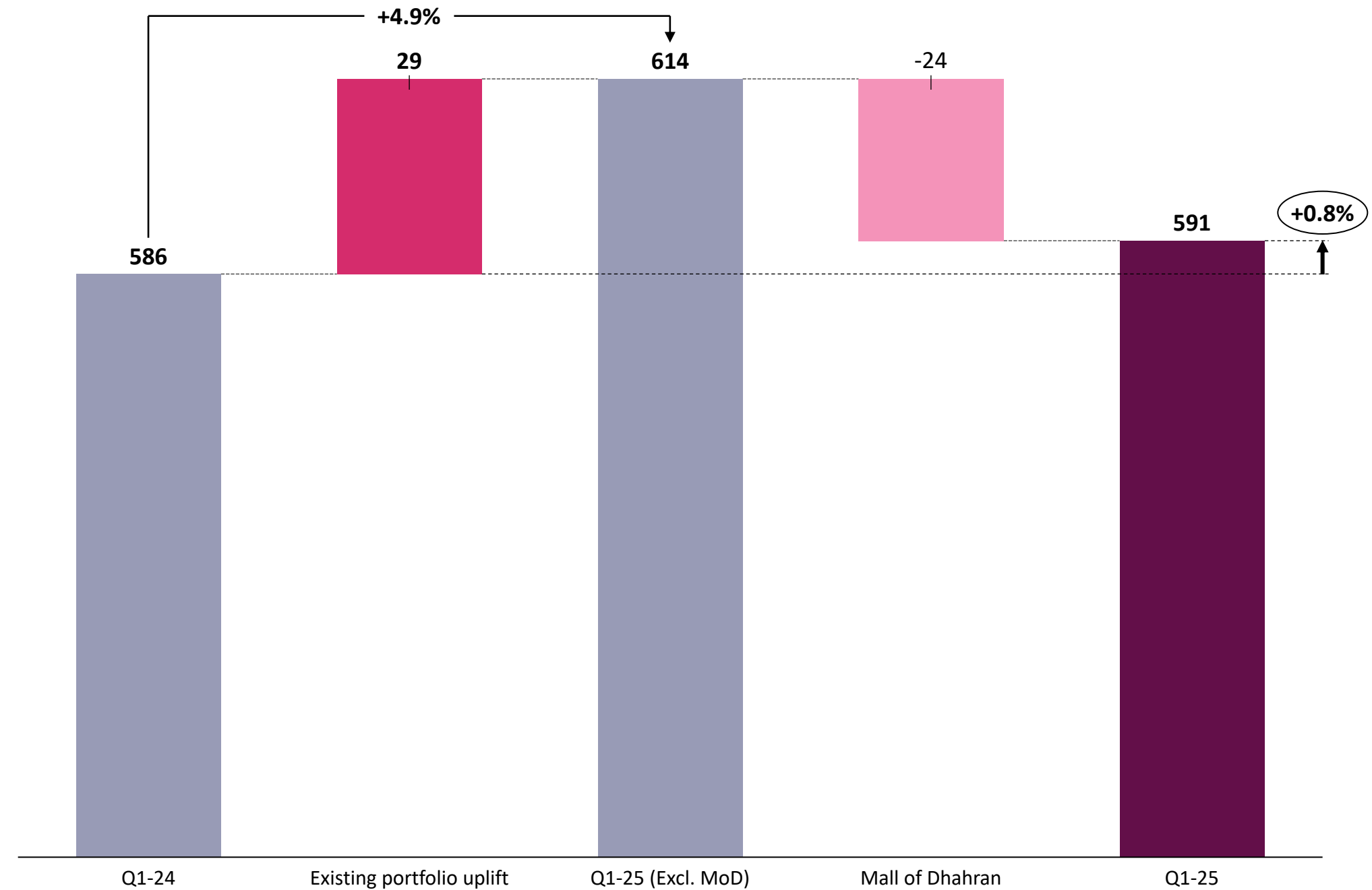
## Stable top-line growth across the portfolio



### Revenue Breakdown | SAR m



### Revenue Bridge (SAR)



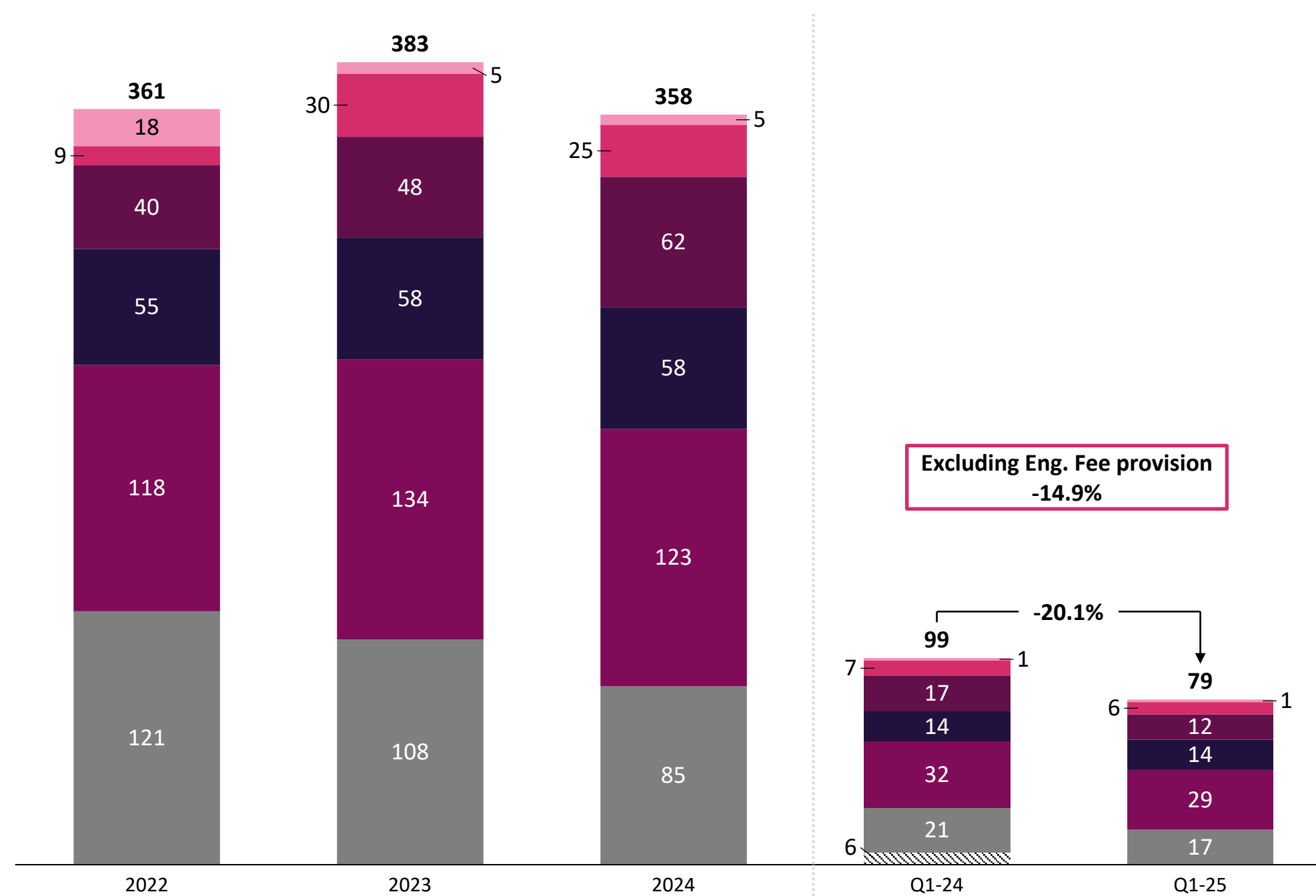


## Disciplined investments for continued excellence

Supporting product excellence coupled with cost control initiatives



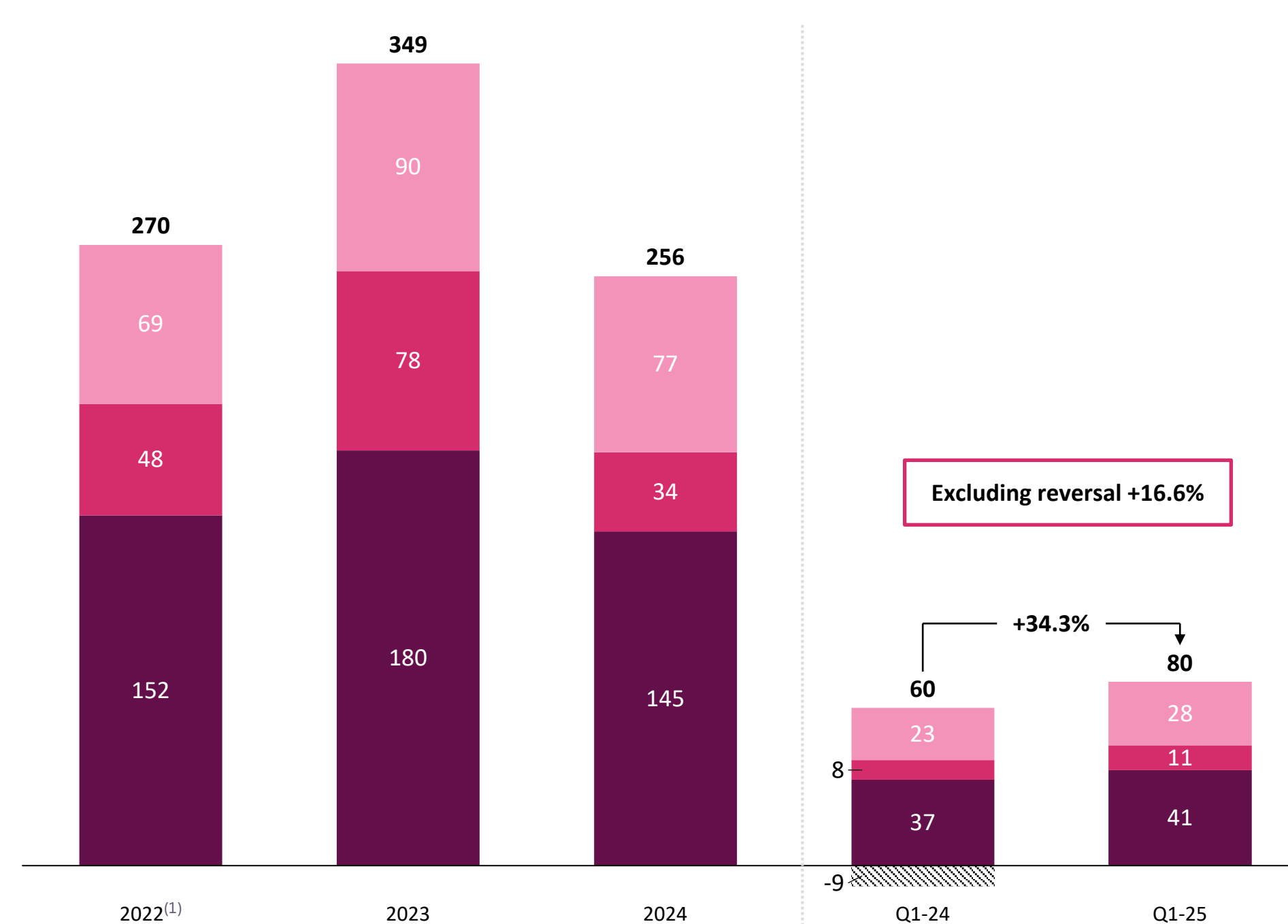
### Cost of Revenue Breakdown | SAR m



Other Salaries Security & Cleaning  
 Insurance Maintenance Utilities  
 Eng. Fees provision



### G&A Breakdown | SAR m

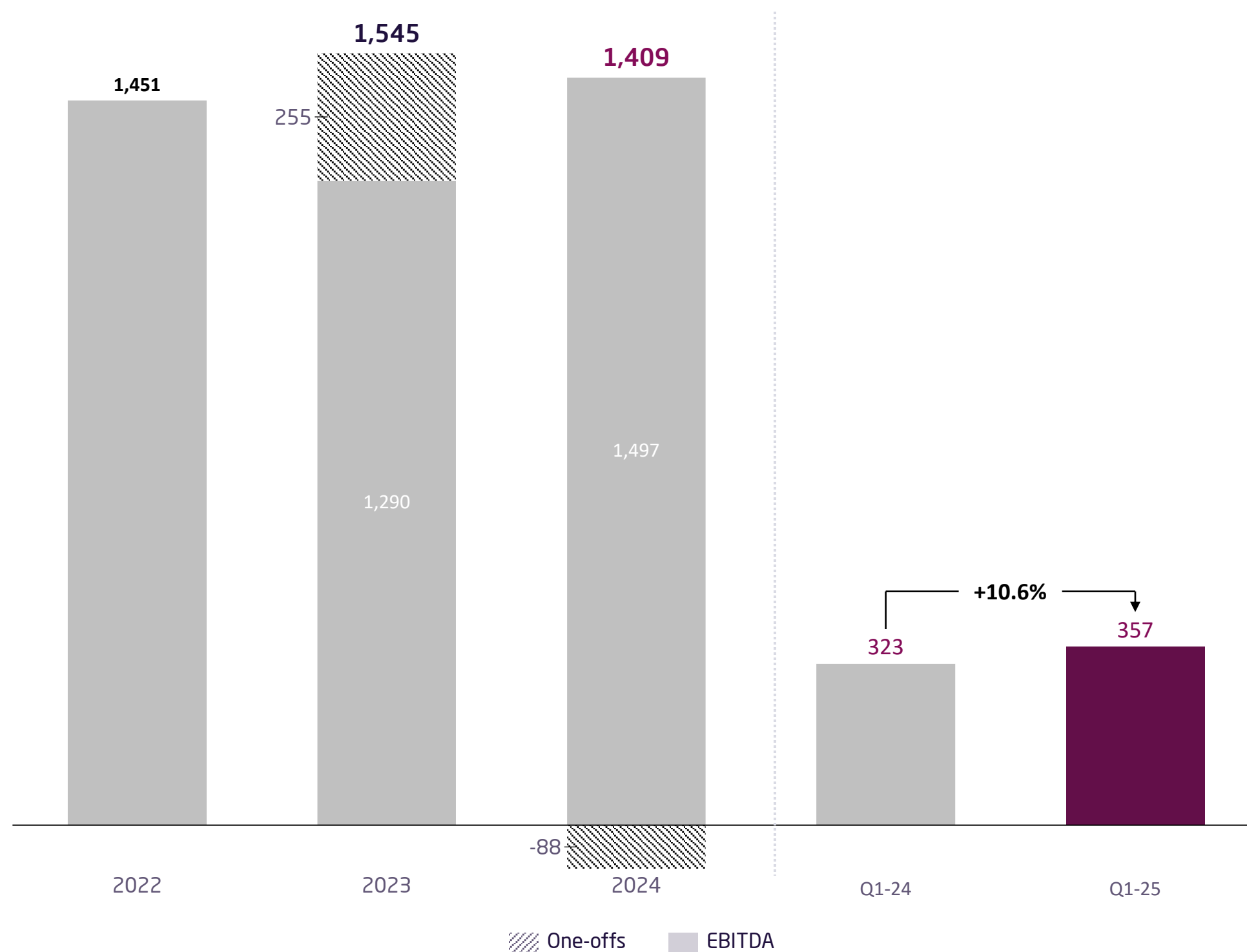


Other Prof fees Salaries & Benefits  
 Reversal

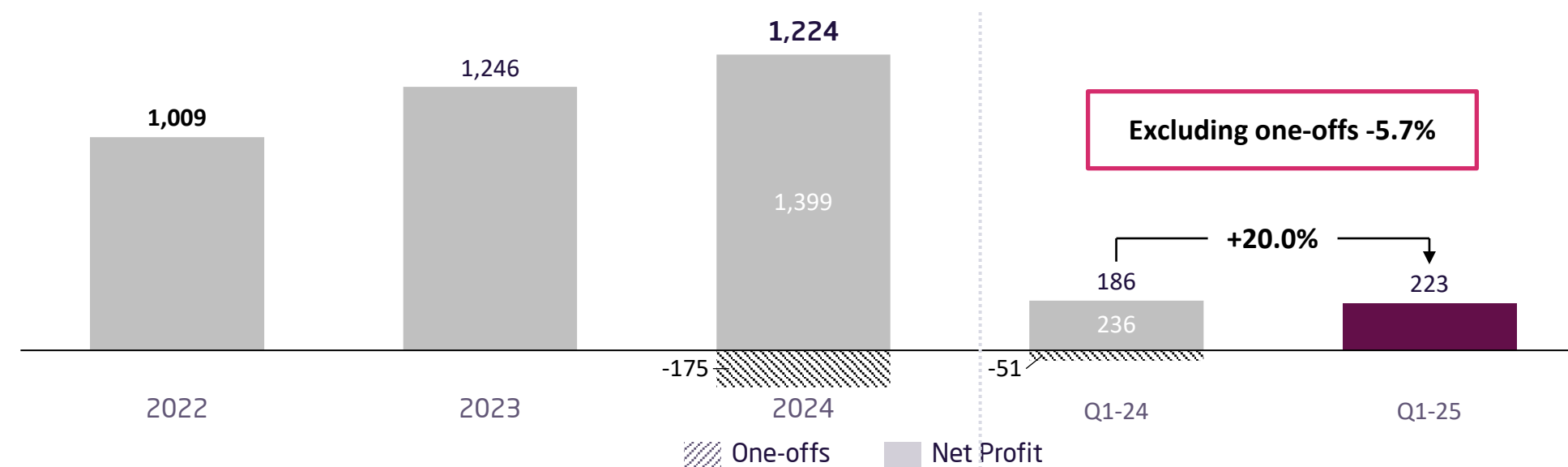


## Profitability margins supporting growth

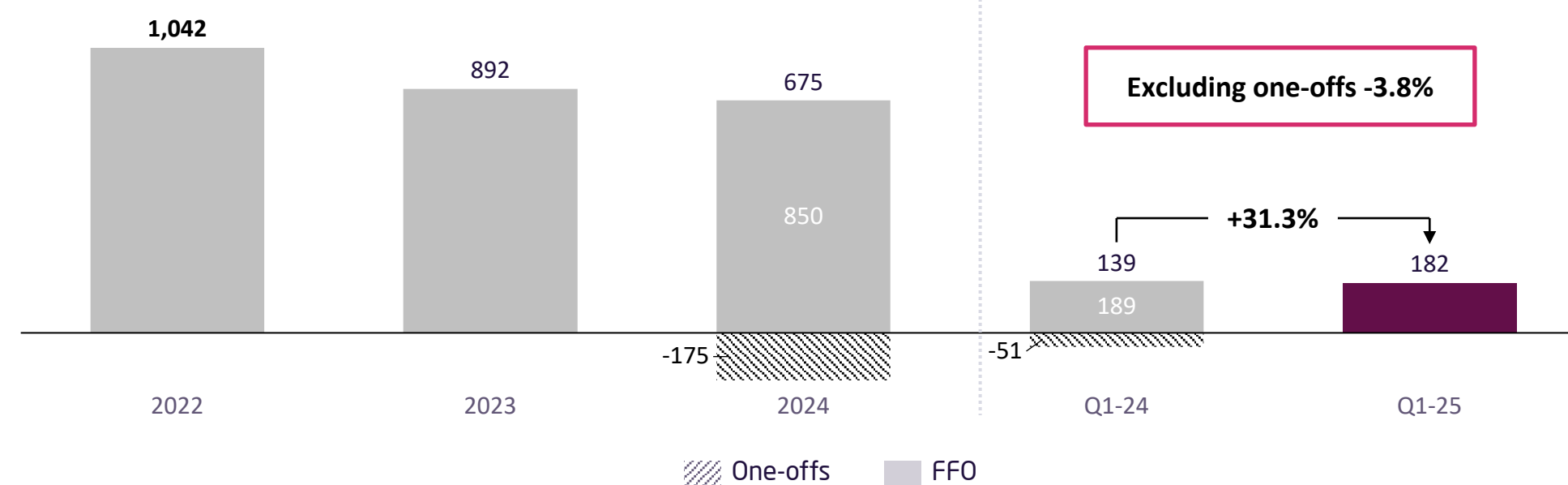
### EBITDA | SAR m



### \*Net Profit | SAR m



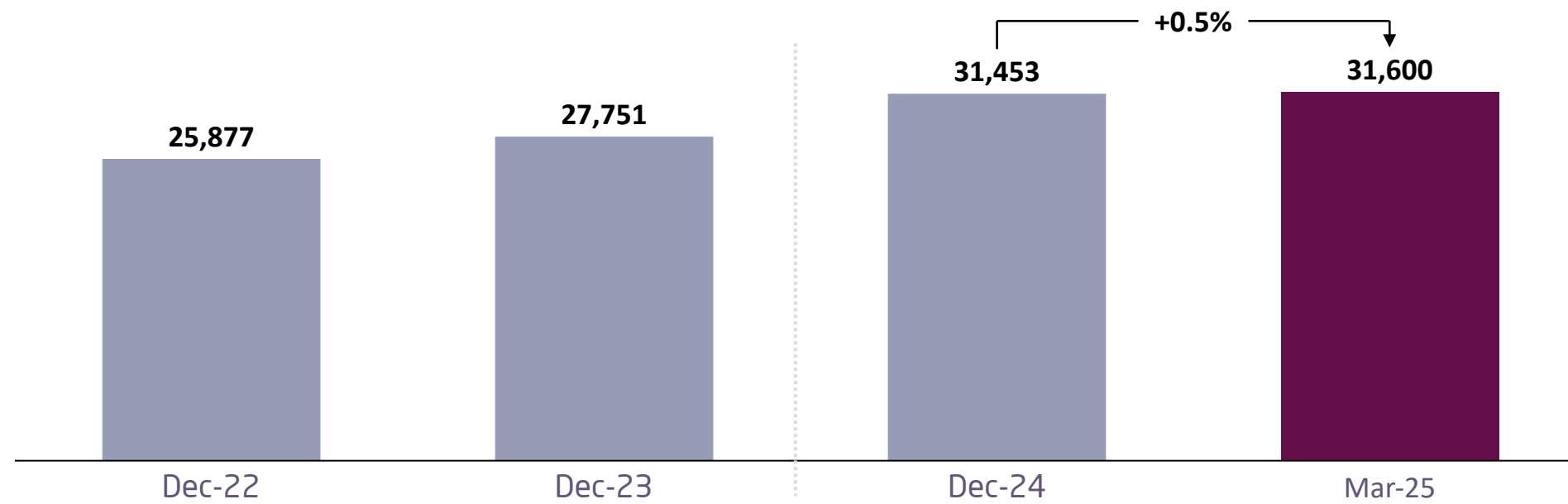
### \*FFO<sup>1</sup> | SAR m



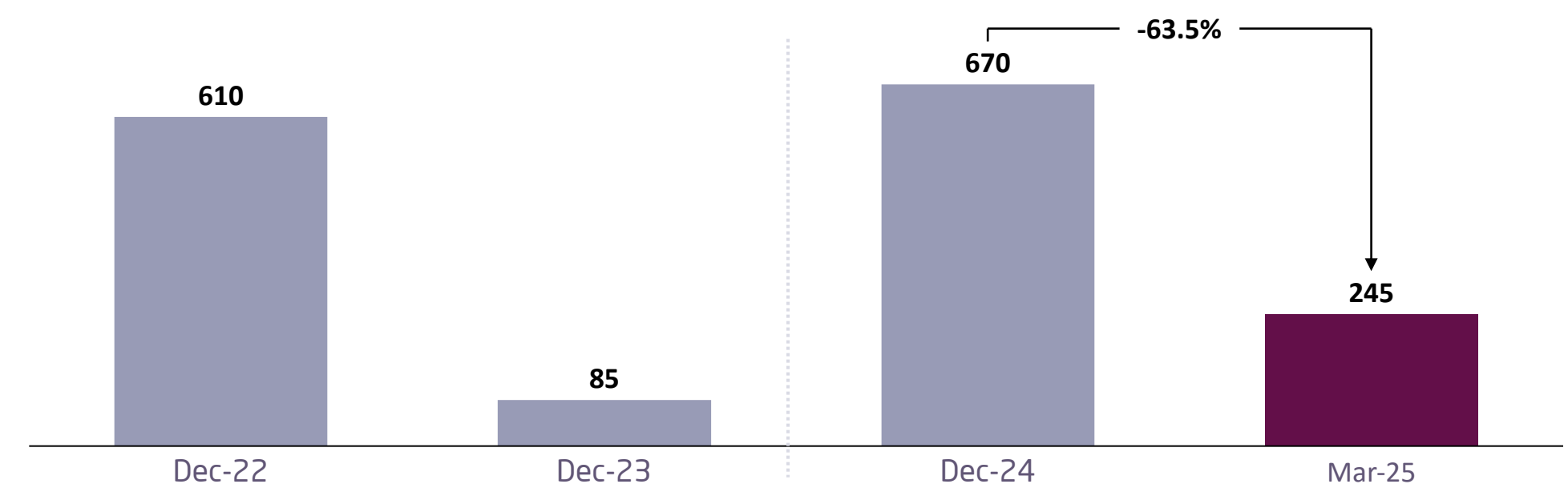
## Strong and liquid balance sheet



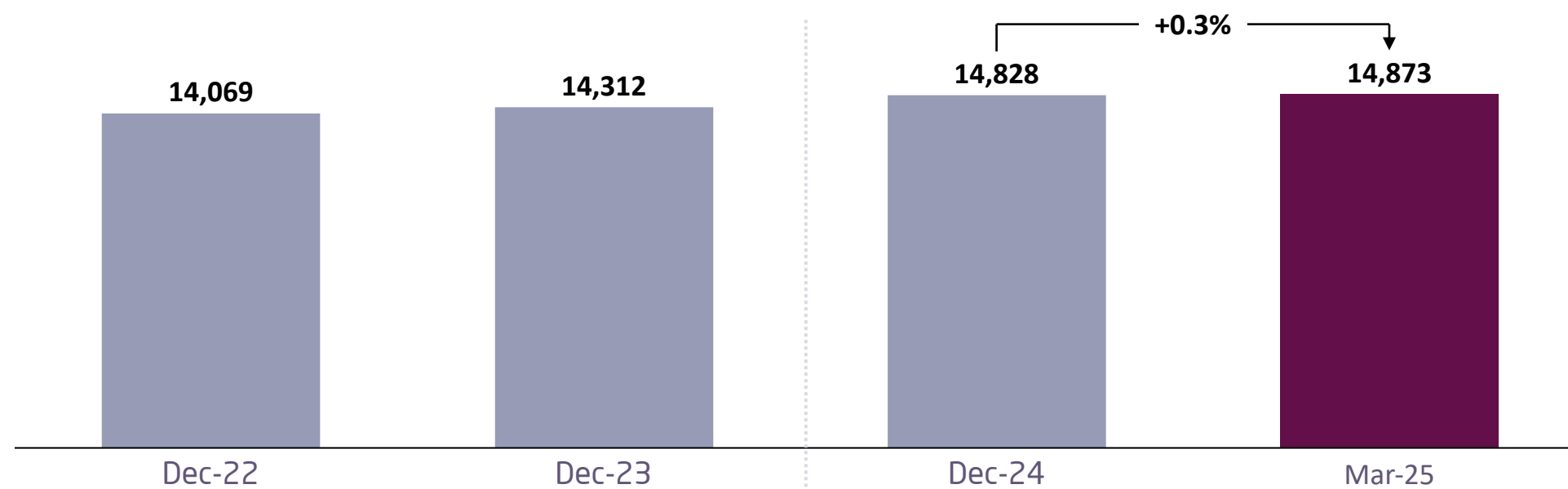
\*Total Assets | SAR MN



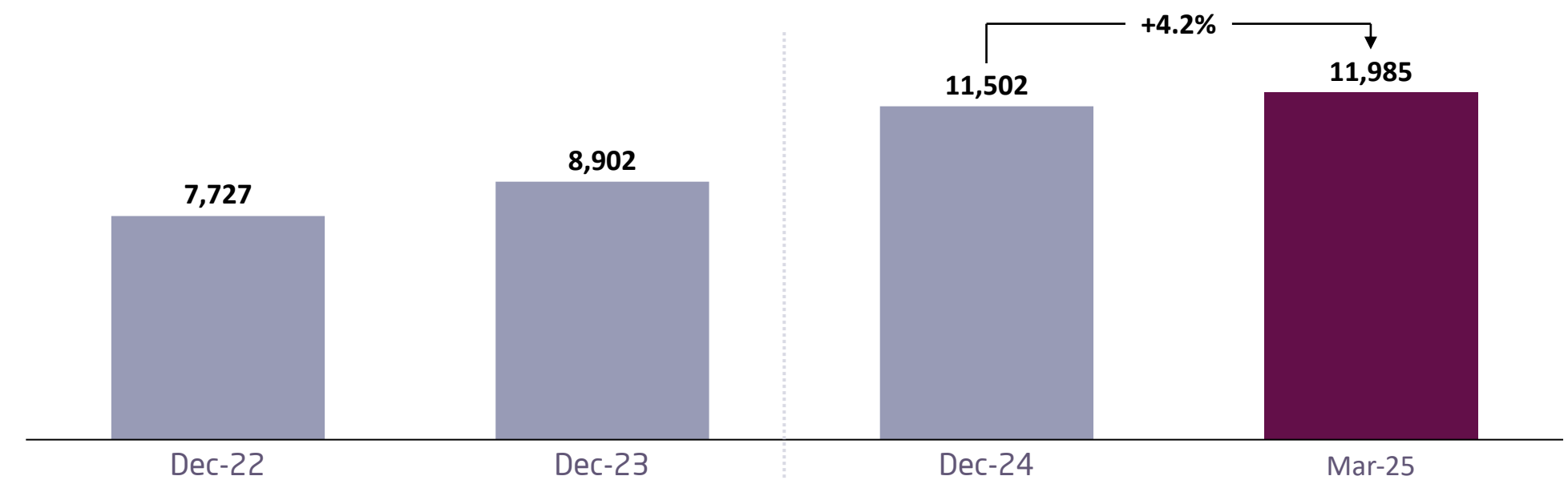
\*Cash | SAR MN



\*Equity | SAR MN



\*Net Debt | SAR MN



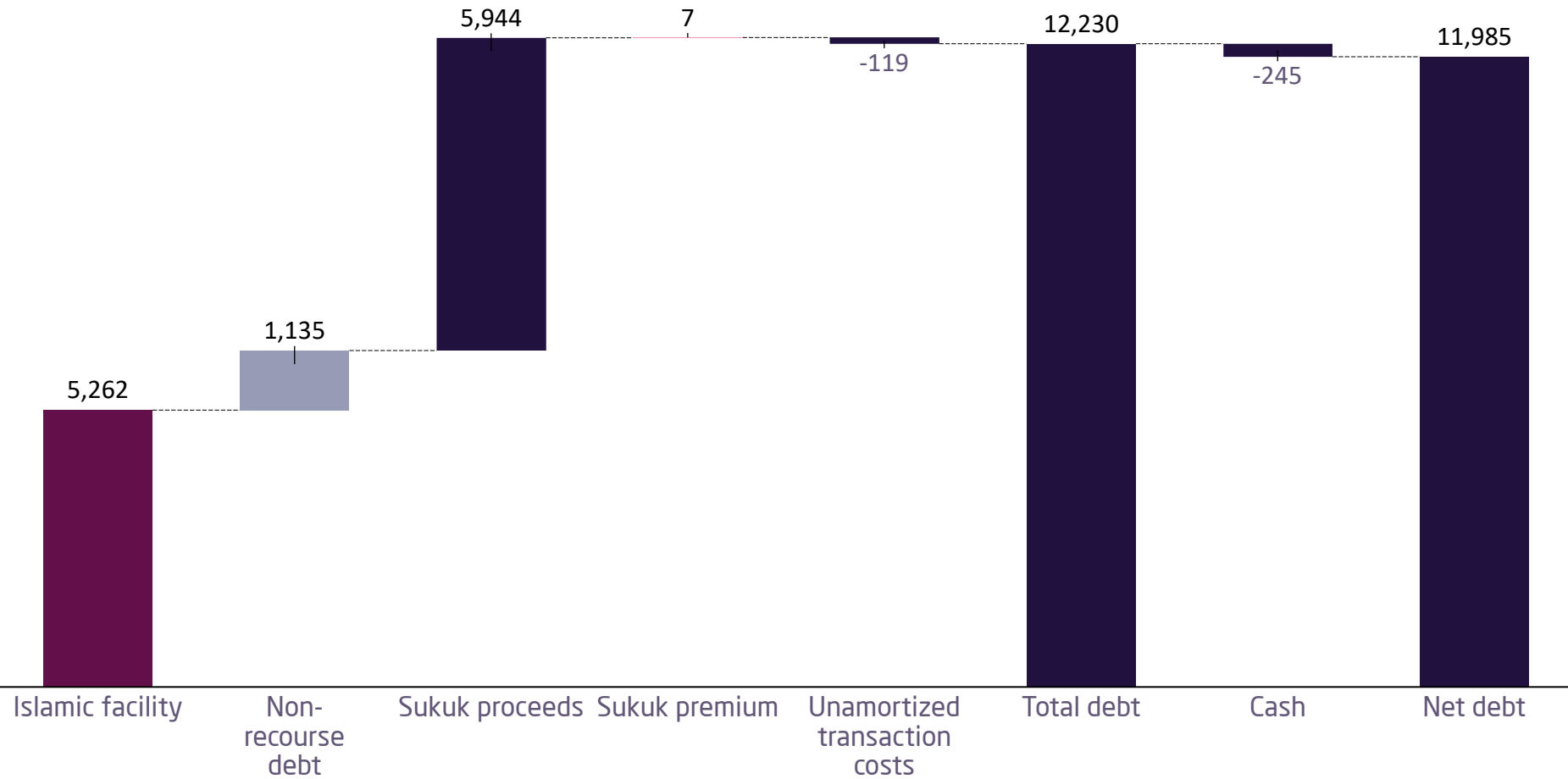




Stable debt profile with no immediate liquidity risk despite high capital intensity in 2025



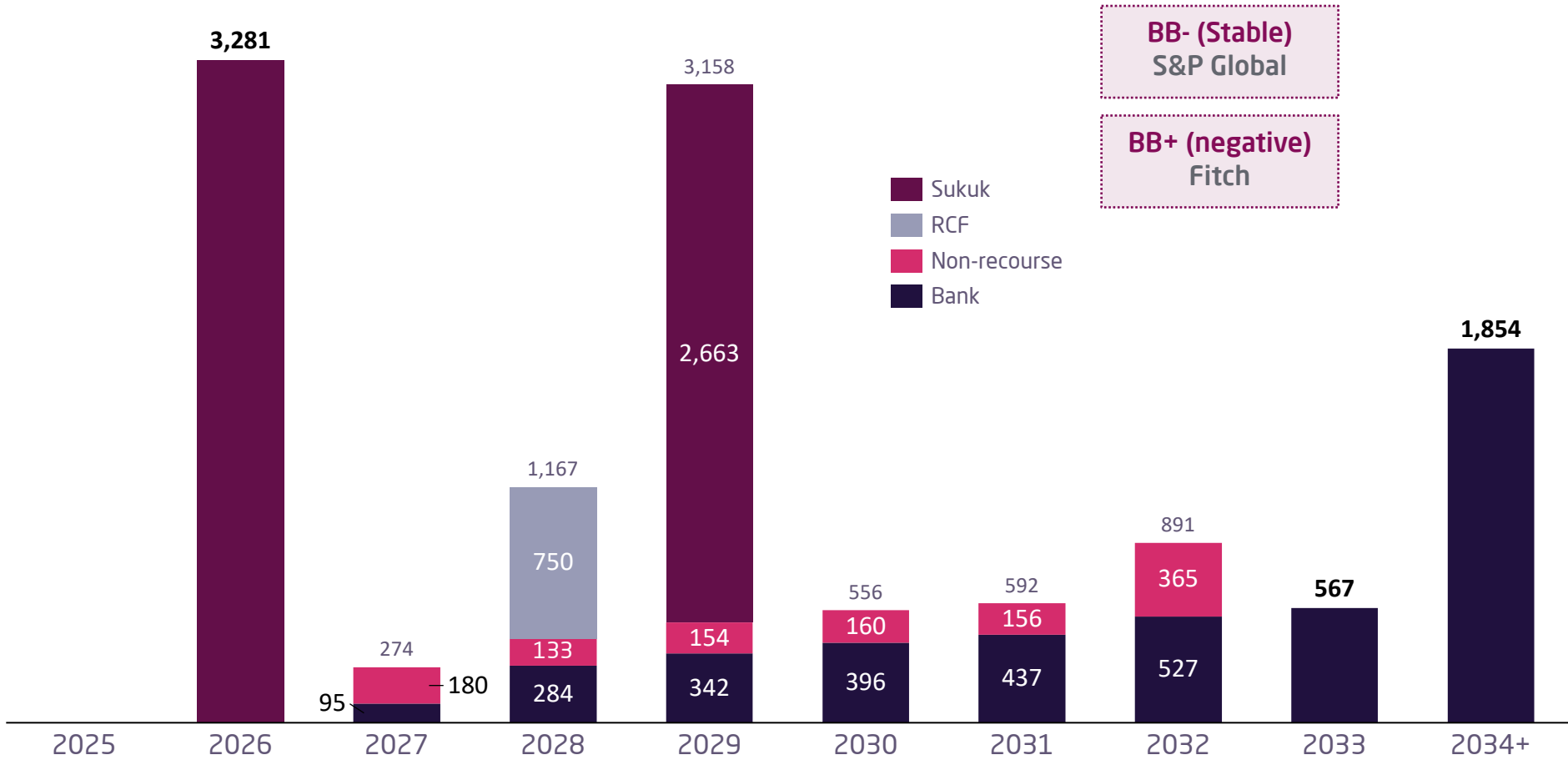
Net Debt<sup>1</sup> Breakdown as of 31-Mar-25 (SAR bn)



	2020	2021	2022	2023	2024	Q1-25
Secured Debt	74%	74%	39%	43%	51%	52%
Unsecured Debt	26%	26%	61%	57%	49%	48%
W. Avg. Cost of Debt	4.7%	3.6%	6.4%	6.5%	7.3%	7.2%



Debt Maturity Profile – Amortizing Facility<sup>1</sup> (SARm)



	SAR Sukuk Program	USD Sukuk Program
Size	SAR 4,500m	USD 1,000m (SAR 3,750m equivalent)
Status	Targeting to do a Sukuk (SAR) issuances in Q2/Q3 '25. Proceeds from the Sukuk to be used towards buying back a portion of the October'26 Sukuk.	New USD issuance end of Q3/Q4 '25. Proceeds will be used to buy back the remaining Oct'26 Sukuk.

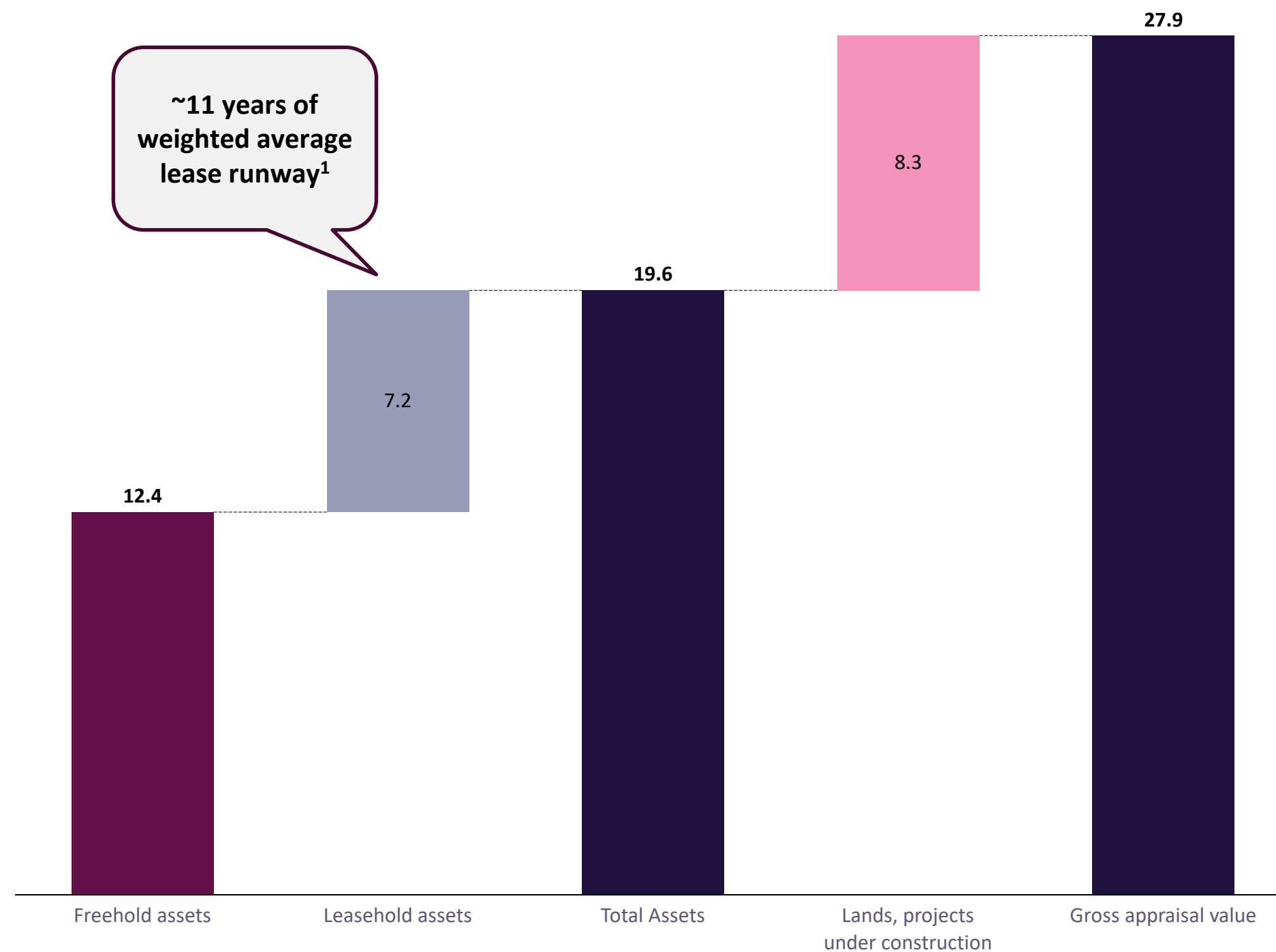


## Product excellence

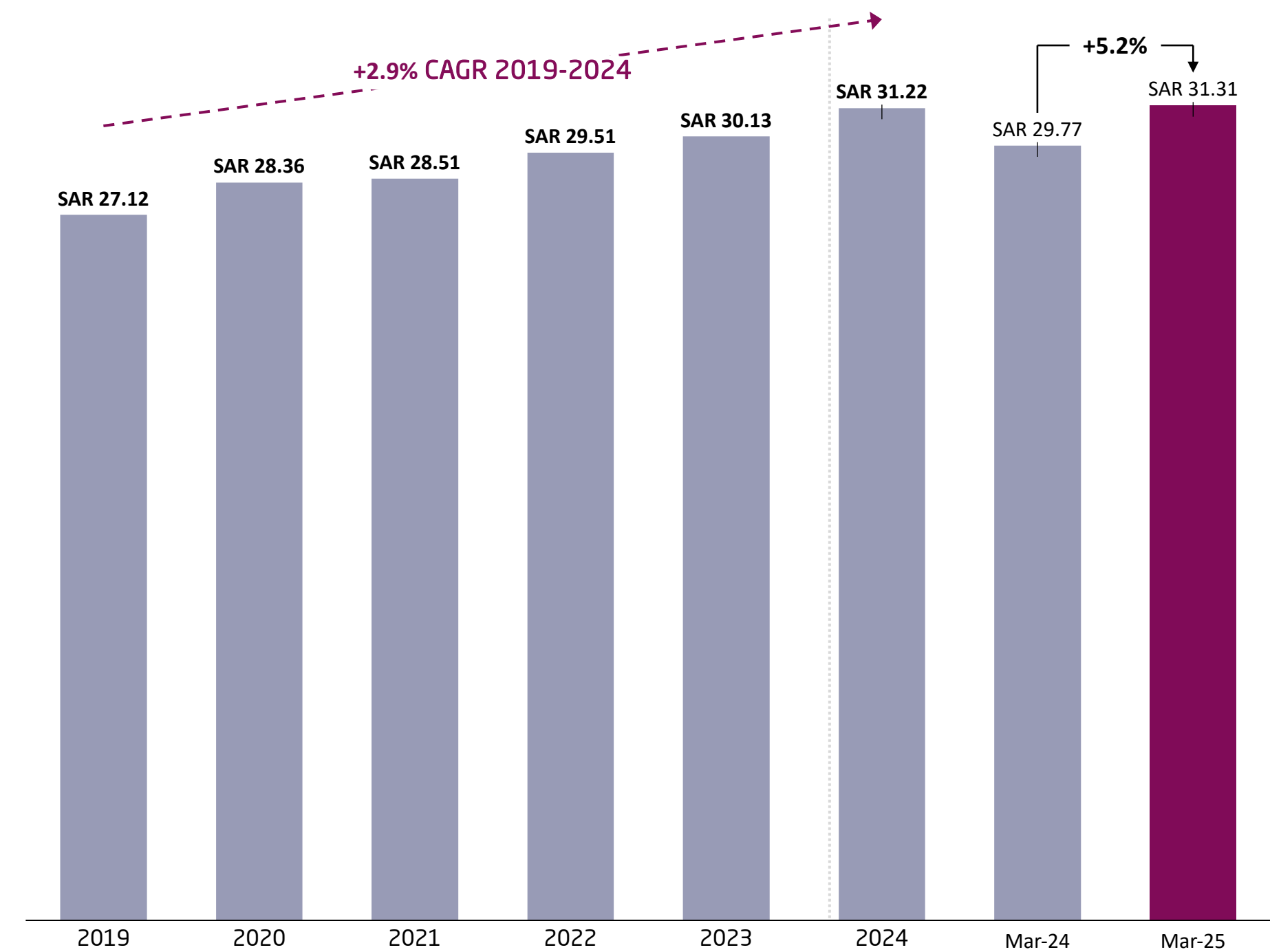
Key new projects in freehold and favourable lease expiry profile on leasehold assets



### Fair Value of Asset Portfolio as of March 2025 (SAR bn)



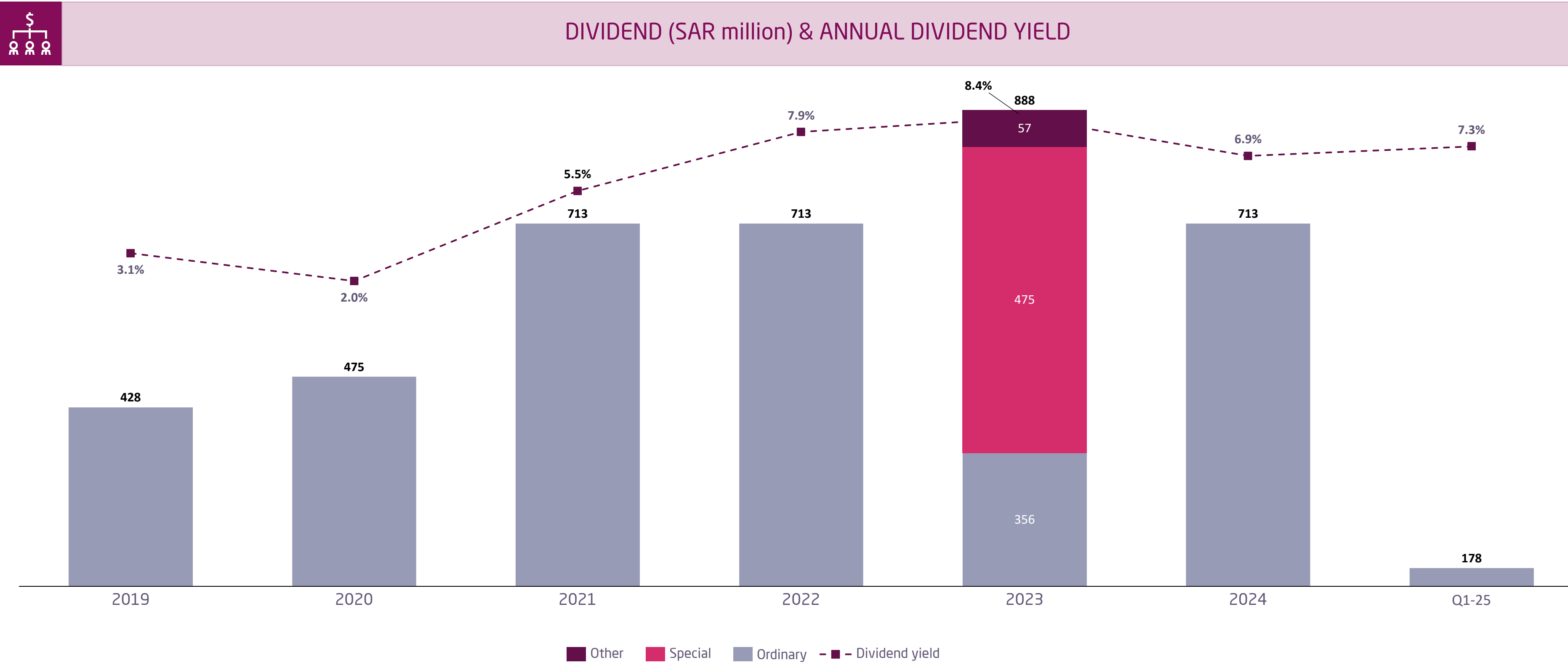
### Record-setting NAV per share







Reflecting commitment to shareholders













2025 guidance

	2024 (actual)	2025 (guidance)
 GLA - year-end (sqm)	1,377,963	1,292,566
 Occupancy (like-for-like) - year-end	94.4%	94.0-95.0%*
 Group revenue	SAR 2,344 million	Flat**
 Adjusted EBITDA margin	63.9%	70% - 75 %

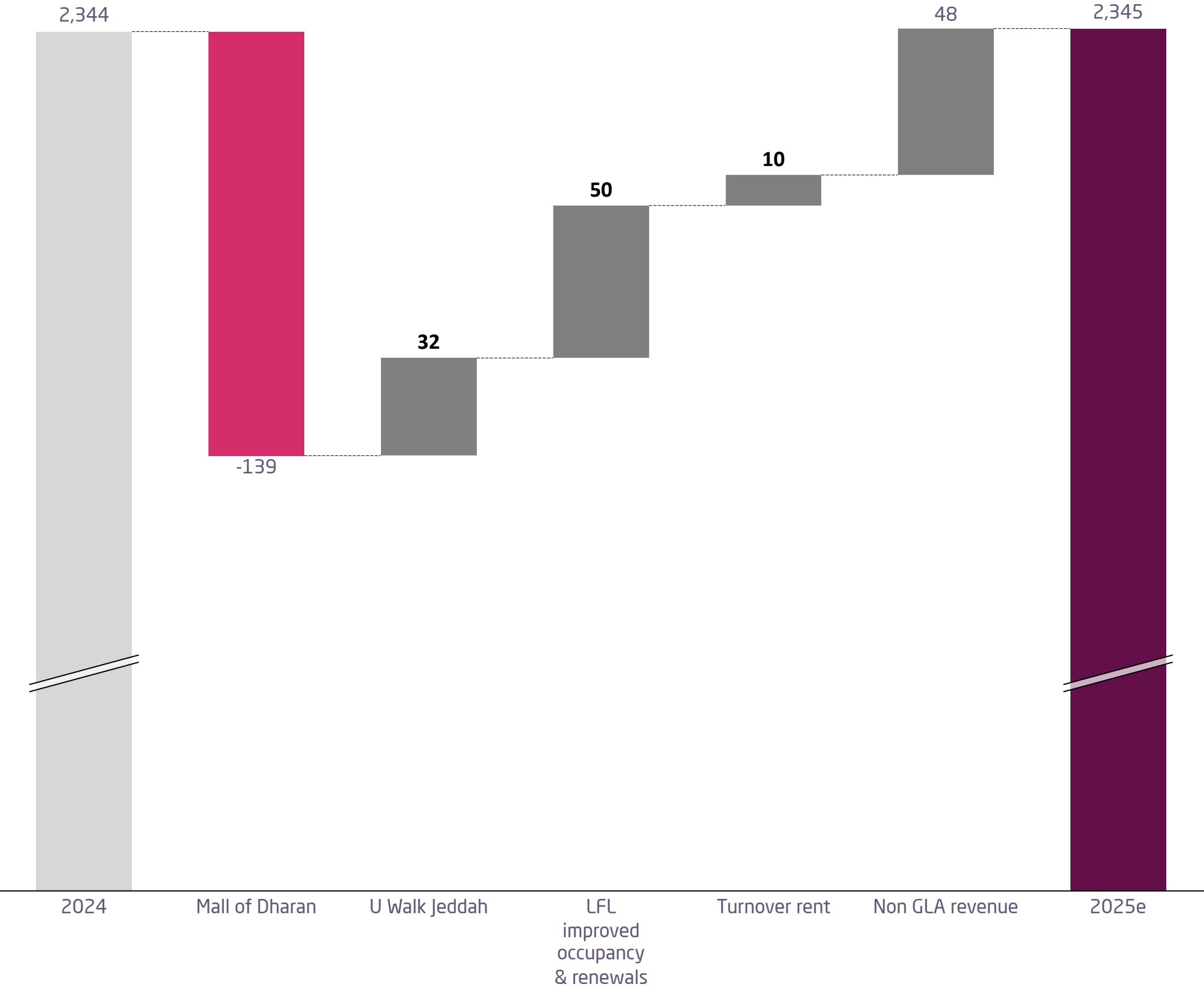
\*Calculation excludes U Walk Jeddah, Jawharat Jeddah and Mall of Dharan

\*\* Revenue for 2025 is expected to be flat given while there is expected to be some loss on revenue from Mall of Dhahran, this will be offset by an improvement in rental rates and increase in revenue from media sales. Please refer to the following slide for further details



# Key drivers of revenue growth and impact through 2025

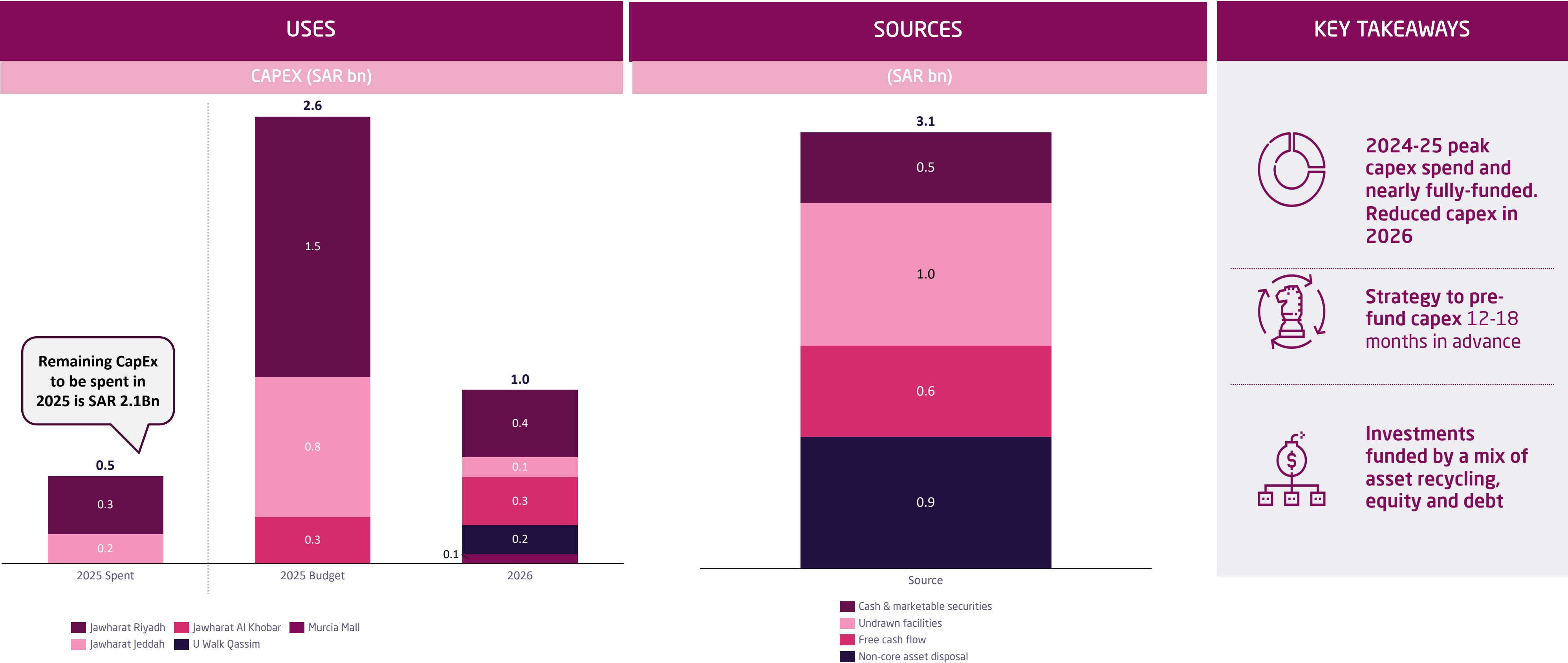
- **Mall of Dharan:** Phase 1 (GLA: 82,000 sqm) was handed over on February 2025. The Phase 2 lease (GLA: 80,000 sqm) expires in April 2026
- **U Walk Jeddah:** Opened in February 2024, with occupancy growth expected to continue throughout 2025
- **Like-for-like growth:** Enhanced by improved occupancy, successful lease renewals
- **Turnover rent:** Anticipated increases in footfall and an improvement in the retail sale conversion rate
- **Non GLA revenue:** Increased through the activation of kiosks and media opportunities







Despite temporary liquidity constraints in 2025, funding is secured. The company remains financially stable



Remaining CapEx to be spent in 2025 is SAR 2.1Bn



# Unibail Rodamco Westfield partnership





# Unibail Rodamco Westfield Partnership



#1 Mall Developer & Operator in Europe

#1 Mall Developer & Operator in KSA

## 20-year exclusivity in Saudi Arabia

- 10 years +10 renewal based on newly agreed rate in Year 10
- Potentially expanded to the rest of the GCC (TBD at later date)

## Up to 8 flagship assets will be rebranded as a Westfield

- Jawharat Jeddah
- Jawharat Riyadh
- Nakheel Mall Dammam

## Continuous support and upgrade of Cenomi Centers’ capabilities

- Audits and business plan reviews
- Hands-on/on-site support
- Hands-on training
- Manuals & Tools

## Access to URW’s international tenant network

- Top luxury and global brands not present in Saudi Arabia



# Deal Upside for Cenomi Centers

## STRATEGIC VALUE

### Cements Cenomi Center’s Uncontested Leadership

- Propels Cenomi Center’s leadership in KSA and in MENA;
- Defends against new entrants



### Tapping into Best-in-Class capabilities, networks and systems

- Leasing
- Marketing
- Operations
- Customer experience



### Positions Cenomi Centers as Highly Preferred Vision 2030 Partner

- Unlocks OpCo. or LeaseCo. opportunities with strategic partners in KSA



### Derisks the Jewels Portfolio

- Boosts chances of unlocking unique tenants in JR and JK



## FINANCIAL VALUE

### GLA Revenue Uplift

- Uplift from better negotiation power with tenants, new brands, increased footfall, and exp.



### Non-GLA Revenue Uplift

- Significant uplift in media sales, through Westfield Rise Platform



### Cap Rate Compression

- Enhanced asset valuations beyond GLA and non-GLA uplifts



### Reduction in Interest Rate Premiums

- Reduction from reduced risk premium and improved credit rating







# Appendix

## Value proposition



### Undisputed #1 mall developer, owner and operator in KSA

- 20+ years of proven track record
- 21 Malls Covering 80%+ of KSA Population
- Larger Than #2, #3 and #4 Players Combined
- Above Market Occupancy and Lease Rates



### First mover in KSA with deep roots in a country on a historic transformation journey

- Significant Headroom for Growth
- Consumers Shifting from Shopping to Convenience and Experience
- Competition and Vision 2030 entities building new retail destinations.



### Building for the future with top lifestyle destinations in top cities

- 6 Projects in Development Pipeline
- 46% GLA increase by 2027
- 1,300 new stores
- Operate top malls in top 5 KSA cities
- Partner-up with Vision 2030 Entities



### Robust balance sheet with a prudent capital structure and diversified sources of funding

- Prudent Financial and Capital Allocation Policy
- Secured funding: 2025-2026 CAPEX
- No major debt maturities until 2026
- Stable debt profile with smooth debt maturity
- Committed to Improving Credit Ratings
- Committed to shareholders | Dividend paying



## Undisputed #1 mall developer, owner and operator in KSA



**10**  
Cities



**~1.3m**  
GLA<sup>1</sup> (sqm)



**34.7m**  
Footfall

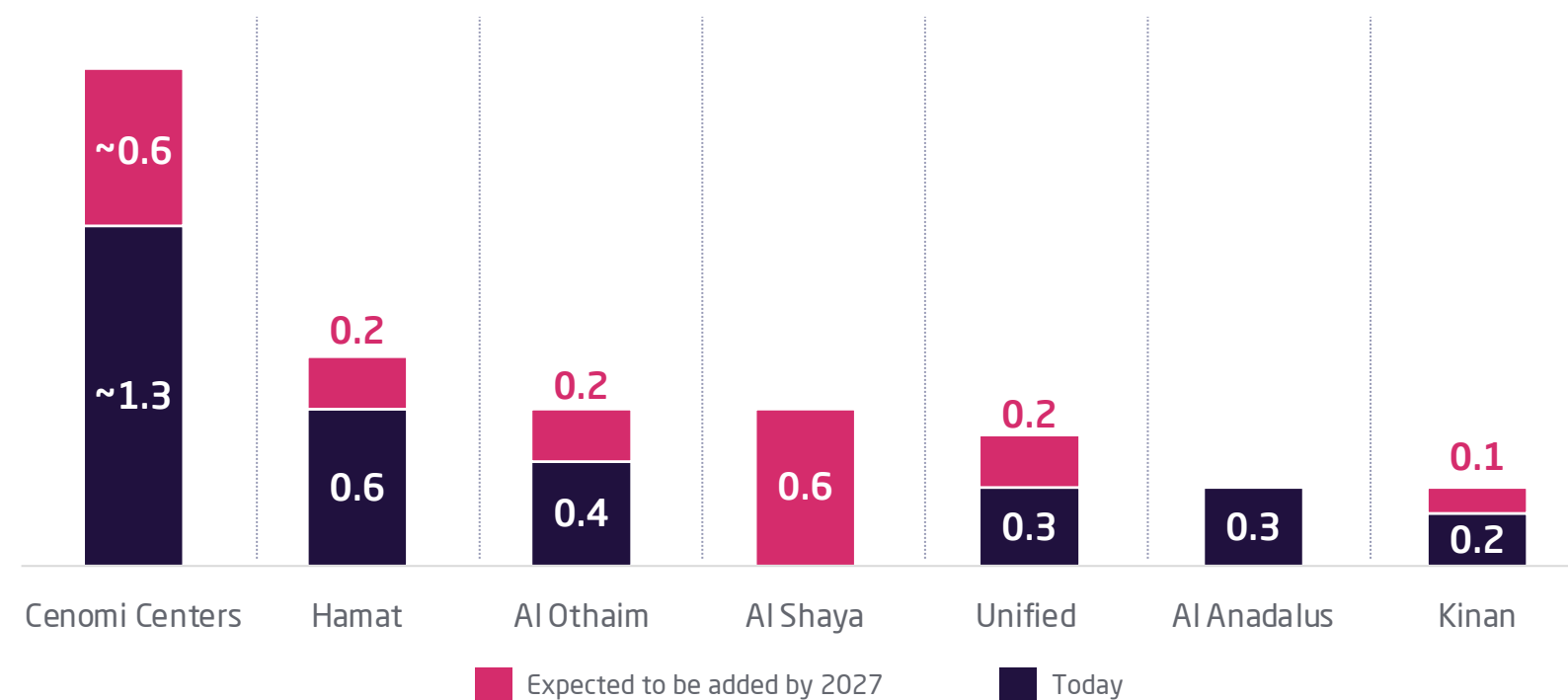
Market Share (as of 2023)

18% <sup>2</sup>	6%	4.2%	-	3.6%	2.7%	2.6%
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# of Assets (as of Dec-23)

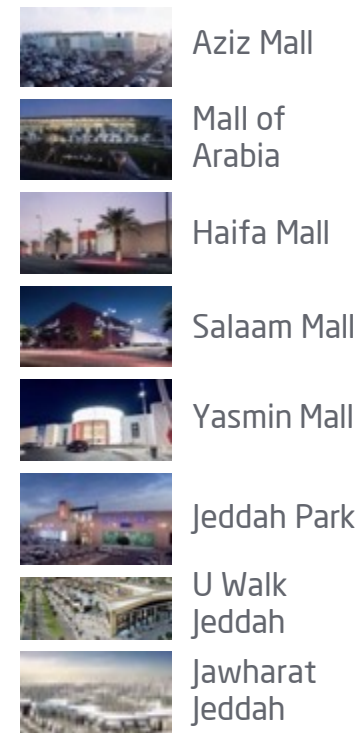
27 <sup>4</sup>	13	14	2	N/A	5	10
21 <sup>1</sup>	11	13	-	43	5	9

GLA<sup>2</sup> (m sqm, current and expected to be added)

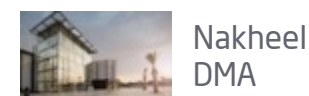


## Strategically Located Assets Covering ~80% of Population

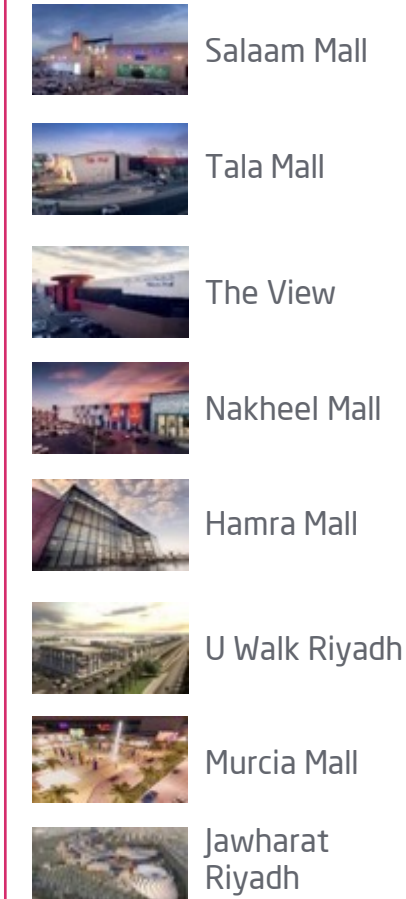
### Jeddah



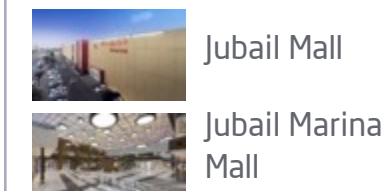
### DMA



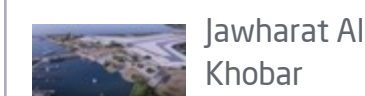
### Riyadh



### Jubail



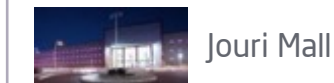
### Al Khobar



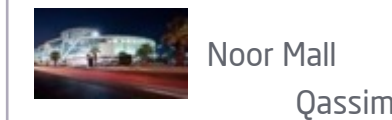
### Makkah



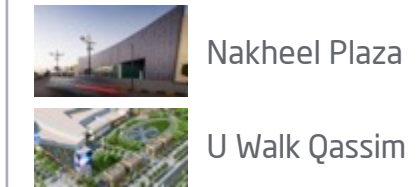
### Taif



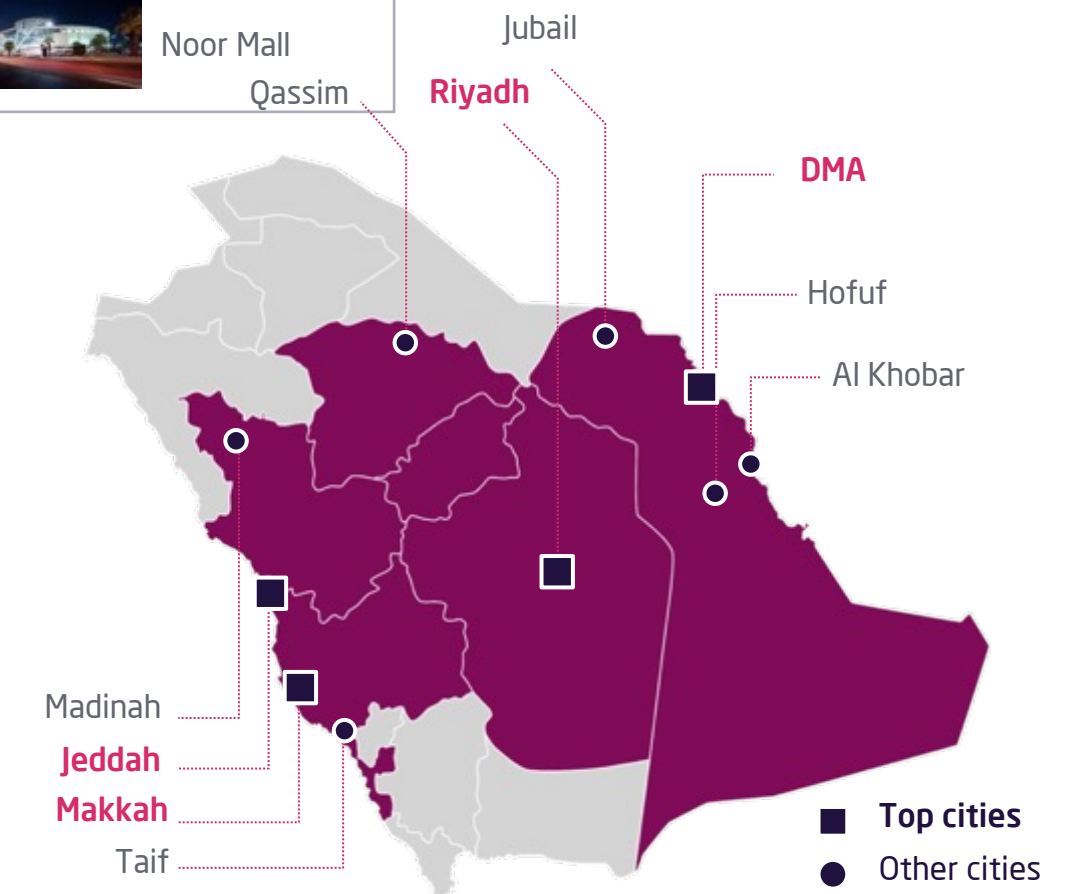
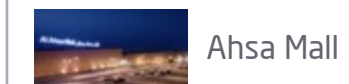
### Madinah



### Qassim



### Hofuf

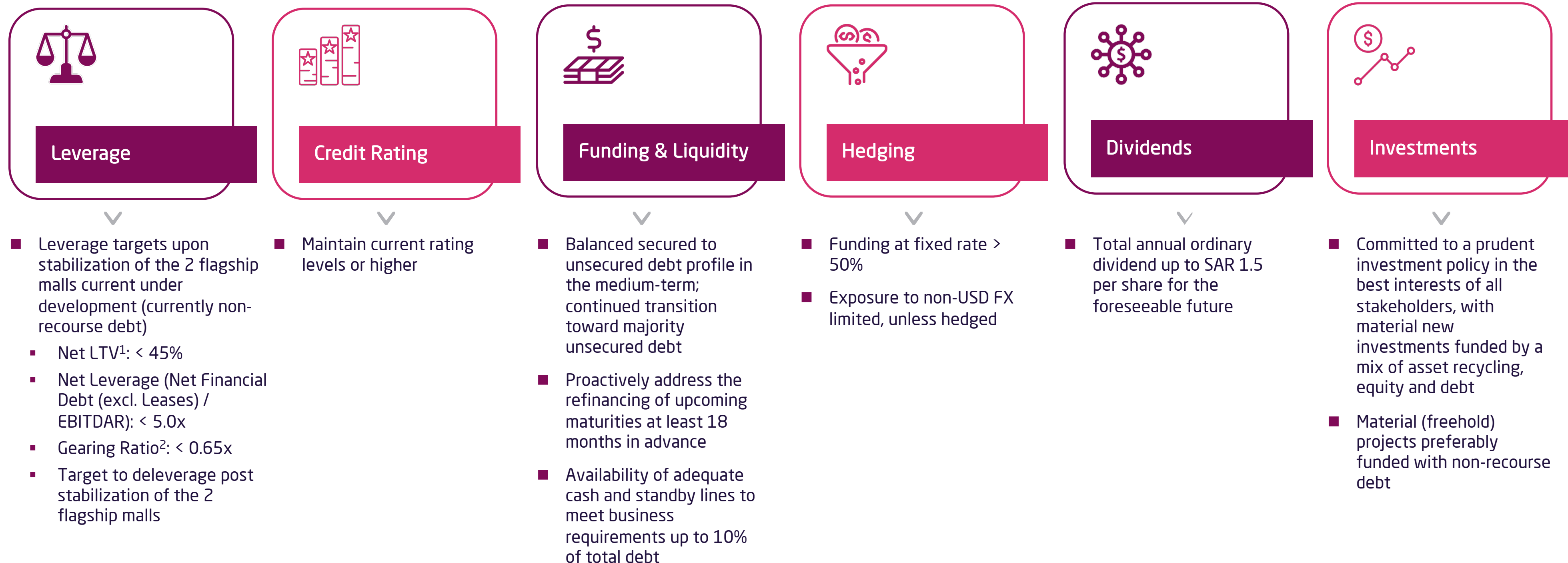


## Our Malls

Mall	City	Performance category	Lease Expiry	Year Opened	Total GLA (sqm)	Occupancy Rate	Revenue Contribution	Cineplex presence
Makkah Mall	Makkah	A	Freehold	2011	37,416	99.4%	6.9%	
Mall of Arabia	Jeddah	A	Freehold	2008	110,016	97.6%	12.1%	Yes
Mall of Dhahran Extension	Dhahran	A	2026	2005	61,657	65.0%	6.0%	Yes
Nakheel Mall	Riyadh	A	2034	2014	75,473	95.8%	14.1%	Yes
Al Noor Mall	Madinah	A	Freehold	2008	68,763	97.5%	6.2%	Yes
U-Walk	Riyadh	A	2046	2019	48,018	95.1%	3.1%	Yes
Nakheel Mall Dammam	Dammam	A	Freehold	2019	58,103	99.3%	7.6%	Yes
Hamraa Mall	Riyadh	A	Freehold	2016	55,265	97.5%	5.2%	Yes
The View	Riyadh	A	Freehold	2021	54,243	94.4%	4.2%	Yes
Total A					569,144	93.6%	65.4%	
Aziz Mall	Jeddah	B	2046	2005	66,701	90.0%	4.3%	Yes
Salaam mall - Riyadh	Riyadh	B	Freehold	2005	47,517	95.8%	3.4%	Yes
Juri Mall	Taif	B	2035	2015	48,139	95.9%	4.8%	
Yasmeen Mall	Jeddah	B	2034	2016	59,894	95.9%	5.4%	Yes
Salaam Mall - Jeddah	Jeddah	B	2032	2012	124,466	84.8%	5.0%	Yes
Total B					346,717	90.7%	22.9%	
Al Ehsa Mall	Ahsa	C	Freehold	2010	44,099	88.2%	1.7%	Yes
Jubail Mall	Jubail	C	Freehold	2015	20,810	76.6%	0.7%	Yes
Haifa Mall	Jeddah	C	2032	2011	33,458	77.3%	1.1%	Yes
Nakheel Plaza	Qassim	C	2029	2004	43,214	96.9%	2.4%	Yes
Tala Mall	Riyadh	C	2029	2014	20,674	79.5%	1.1%	Yes
Total C					162,245	85.7%	7.0%	
Total Like-for-Like					1,078,106	93.1%	95.3%	
U-Walk Jeddah	Jeddah		2052	2023	55,043	70.1%	3.6%	
Consolidated					1,133,149	90.4%	98.9%	
Jeddah Park			N/A	2021	120,208	79.3%	1.1%	Yes
Total					1,253,357	89.4%	100.0%	

## Prudent financial and capital allocation policy

Temporary increase in leverage due to significant investments in flagship projects. This was a deliberate decision to drive future growth





Significant progress on non-core asset sale program with ~SAR 1.1bn unlocked to date

~SAR 200m sale of Sahara Plaza is the most recent milestone in Cenomi Centers’ non-core asset sale program <sup>1</sup>

City	Location	Land Size (sqm)	Market Value (SAR)
Riyadh	King Fahad Road - Olaya	18,000	Sold for <b>230m</b>
Riyadh	Adjacent to Jawharat Riyadh	118,000	Sold for <b>645m</b>
Al Ahsa	Granada District	29,384.90	Sold for <b>62.5m</b>
Riyadh	Sahara Plaza	13,000	Sold for <b>200m</b>
Qassim	Adjacent to U-Walk Qassim	1,216,000	<b>~800m</b>
Others	-	603,000	



Source: Company information / disclosure.  
<sup>1</sup> The revenue impact of the sale is expected to be marginal at SAR 5m per year.



# Income Statement

(SAR million)	Q1-24	Q1-25	% Change
Revenues	585.8	590.6	0.8%
Cost of Revenue	(98.7)	(78.9)	-20.1%
Gross profit	487.0	511.7	5.1%
Gross margin	83.1%	86.6%	0.03pp
Other operating income	1.5	27.8	N/M
Net fair value gain / (loss) on investment properties	50.7	44.5	-12.2%
Advertisement and promotion	(11.9)	(4.3)	-64.1%
General and administration	(59.5)	(79.9)	34.3%
Impairment loss on accounts receivable	(97.1)	(79.6)	-18.0%
Other operating expenses	(0.1)	(22.0)	N/M
Operating profit	370.7	398.2	7.4%
Finance income overdue from related parties	-	7.1	
Finance Costs Over Loans and Borrowings	(139.1)	(139.3)	0.2%
Finance Costs Over Lease Liabilities	(34.3)	(33.1)	-3.6%
Net finance costs	(173.4)	(165.3)	-4.7%
Share of profit of equity-accounted investee	(0.6)	(0.2)	-65.6%
Profit before Zakat	196.6	232.7	18.3%
Zakat	(11.0)	(10.0)	-9.1%
Net Profit	185.6	222.7	20.0%

## Reconciliation to EBITDA

(SAR million)	Q1-24	Q1-25	% Change
Net profit	185.6	222.7	20.0%
Add back			
Zakat charge	11.0	10.0	-9.1%
Net finance costs	173.4	165.3	-4.7%
Net fair value gain/loss on investment properties	(50.7)	(44.5)	-12.2%
Depreciation - P&E	3.6	3.9	6.0%
EBITDA	323.0	357.4	10.6%
Margin	55.1%	60.5%	0.05pp



# Balance Sheet

(SAR million)	31-Dec-24	31-Mar-25
Investment properties	28,019.4	28,288.9
Amounts due from related parties- non-current portion	235.0	194.2
Property and equipment	49.0	48.5
Accrued revenue - non-current portion	137.3	143.8
Investment in equity accounted investee	87.7	94.0
Investment at FVTPL - non-current portion	0.1	200.1
Other non-current assets	12.5	12.1
<b>Non-current assets</b>	<b>28,541.0</b>	<b>28,981.6</b>
Development properties	353.8	353.8
Accrued revenue	68.7	68.7
Accounts receivable and others	482.9	508.6
Amounts due from related parties	408.4	497.6
Prepayments and other assets	431.0	305.5
Investment at FVTPL	255.9	255.9
Cash and cash equivalents	670.3	244.8
Asset held for sale	240.5	383.5
<b>Current Assets</b>	<b>2,911.5</b>	<b>2,618.4</b>
<b>Total Assets</b>	<b>31,452.5</b>	<b>31,600.0</b>

(SAR million)	31-Dec-24	31-Mar-25
Loans and borrowings	12,137.6	12,192.5
Lease liabilities	2,790.7	2,750.9
Employee benefits	34.6	37.9
Other non-current liabilities	22.5	11.9
<b>Non-current liabilities</b>	<b>14,985.4</b>	<b>14,993.1</b>
Loans and borrowings - current portion	34.7	37.0
Lease liabilities - current portion	339.6	367.9
Accounts payable and other liabilities	670.9	841.6
Provision	0.0	0.0
Amount due to related parties	234.7	154.4
Unearned revenue	282.7	255.9
Zakat liabilities	76.4	77.2
<b>Current liabilities</b>	<b>1,639.1</b>	<b>1,734.1</b>
<b>Total Equity</b>	<b>14,828.0</b>	<b>14,872.8</b>
<b>Total Liabilities and Equity</b>	<b>31,452.5</b>	<b>31,600.0</b>




# Thank you

## Contacts

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