



Results of the JSW Group

for the fourth quarter
and 12 months of 2024

April 2025



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Agenda

Section	Title	Presented by
I.	Introduction	Ryszard Janta
II.	JSW Group in numbers	Ryszard Janta
III.	JSW Group's strategic objectives	Adam Rozmus
IV.	JSW Group's operating results	Adam Rozmus
V.	Market environment	Jolanta Gruszka
VI.	JSW Group's investments	Adam Rozmus
VII.	JSW Group's financial highlights	Remigiusz Krzyżanowski
VIII.	Strategic Transformation Plan	Ryszard Janta
IX.	Q&A	JSW S.A. Management Board

JSW Group in numbers

2024 vs. 2023

Coal production

 **12,250.9 thous. t**
-9.3% vs.
13,507.0 thous. tons in 2023

Coke production

 **3,064.6 thous. t**
-8.6% vs.
3,353.4 thous. tons in 2023

Active longwalls

 **22.8**
+0.4% vs.
22.7 in Q2 2024

MCC

 **804.52 PLN/t**
+14.8% vs.
700.91 PLN/t in 2023

Sales revenues

 **PLN 11,325.8 m**
-26.2% vs.
PLN 15,338.5 m in 2023

Average price of coking coal and coke

 **899.28 PLN/t (coal)**
-20.0% vs. 1,124.52 PLN/t in 2023
 **1,302.80 PLN/t (coke)**
-13.2% vs. 1,501.71 PLN/t in 2023

EBITDA*

 **PLN 396.0 m**
-92.8% vs.
PLN 5,517.4 m in 2023

Net result

 **PLN (7,284.7) m**
vs.
PLN 997.1 m in 2023

* EBITDA (net of non-recurring events – the value of the non-recurring events was PLN 6,896.7 million)



JSW Group's strategic objectives



JSW Group's strategic objectives for 2022 - 2030

(execution in 2024)

Targets and measures	Actual numbers 2024	Actual numbers 2023	Plan for 2022-2030	Trend
EBITDA margin	(57.4)%*	29.7%	25%	↓
Stable funding structure Equity to non-current assets ratio >1 in 2022-2030	0.74**	0.94**	>1	↓
Efficient JSW Group:* • MCC (Mining Cash Cost) • CCC (Cash Conversion Cost)	804.52 [PLN/t] 317.29 [PLN/t]	700.91 [PLN/t] 315.21 [PLN/t]	429.33 [PLN/t] plan for 2024 262.79 [PLN/t] plan for 2024	↑
Safe JSW Further improvement of our high safety standards (LTIFR)	7.68	8.44	-	
Reducing the JSW Group's carbon footprint by 30% vs. 2018 by 2030	(1.8)% 2024 - 8.43 m tons CO ₂ e	(2.3)% 2023 - 8.01 m tons CO ₂ e	(30)% vs. 2018 2030 - 5.74 m tons CO ₂ e	↓

JSW Group's strategic objectives for 2022 - 2030

(execution in 2024)

Targets and measures	Actual numbers 2024	Actual numbers 2023	Plan for 2022-2030	Trend
Diversification of revenue:				
Product and geographic diversification	Coal: 76% - Poland 24% - Europe	Coal: 75% - Poland 25% - Europe	Coal: 60% - Poland 40% - Europe 2030 target	
	Coke: 74% - Europe* 26% - World**	Coke: 71% - Europe* 29% - World**	Coke: 60% - Europe* 40% - World** 2030 target	
10% of revenue generated from sales of products unrelated to the core business	10.5%	9.4%	10%	
Securing the coal resource base: Expenditures for key development investments aimed at opening up new deposits and mining levels	634.4 [m PLN]	603.5 [m PLN]	400 [m PLN] yearly average	

JSW Group's strategic objectives for 2022 - 2030

(execution in 2024)

Targets and measures	Actual numbers 2024	Actual numbers 2023	Plan for 2022-2030	Trend
Product quality: Production and sale of coking coal and coke with stable and desirable CSR*/CRI* quality parameters *max deviation +/-5	Coking coal: CSR 58 CRI 31	Coking coal: CSR 58 CRI 31	Coking coal: CSR $\geq$ 60 CRI $\leq$ 30	
	Coke: CSR 65 CRI 27	Coke: CSR 65 CRI 27	Coke: CSR $\geq$ 62 CRI $\leq$ 29	
Coal and coke production:	Coal: 12.3 [m tons]	Coal: 13.5 [m tons]	Coal: 15.3 [m tons] plan for 2024	
	Coke: 3.1 [m tons]	Coke: 3.4 [m tons]	Coke: 3.6 [m tons] plan for 2024	
Coking coal above 90% of the output mix starting in 2026	~ 81.0%	~ 80.5%	90% target from 2026	

ESG activities

E environment

- Total level of GHG emissions: 13,282,478.85 tons CO₂e
- PLN 189.7 m - expenditures for environmental efforts
- More than 145 million m³ of methane captured, of which more than 91 million m³ of methane was handled
- Score of C in the CDP rating (climate change)
- 64.3 thous. tons of salt produced
- 1,494.5 kWp of installed PV capacity in the Group



S social

- Expenditures for OHS - PLN 1.6 billion
- 900 science scholarships awarded
- Total number of key stakeholders invited to the double materiality assessment process - 921
- Support for 5 orphanages
- Organization of the "JSW Knowledge Mine" science programs, in which approx. 1200 children took part in 2024; about 5.5 thousand children attended the science picnic organized near JSW's headquarters



G governance

- Grand prize - "The Best Annual Report"
- Strengthening the compliance system
- 6,700 employees trained in personal data processing.
- 15 training courses organized regarding, among other things, the existing whistleblowing mechanisms and employees' rights and obligations.
- "This is coal" educational platform
- Training executive and supervisory bodies in the Group on ESG reporting



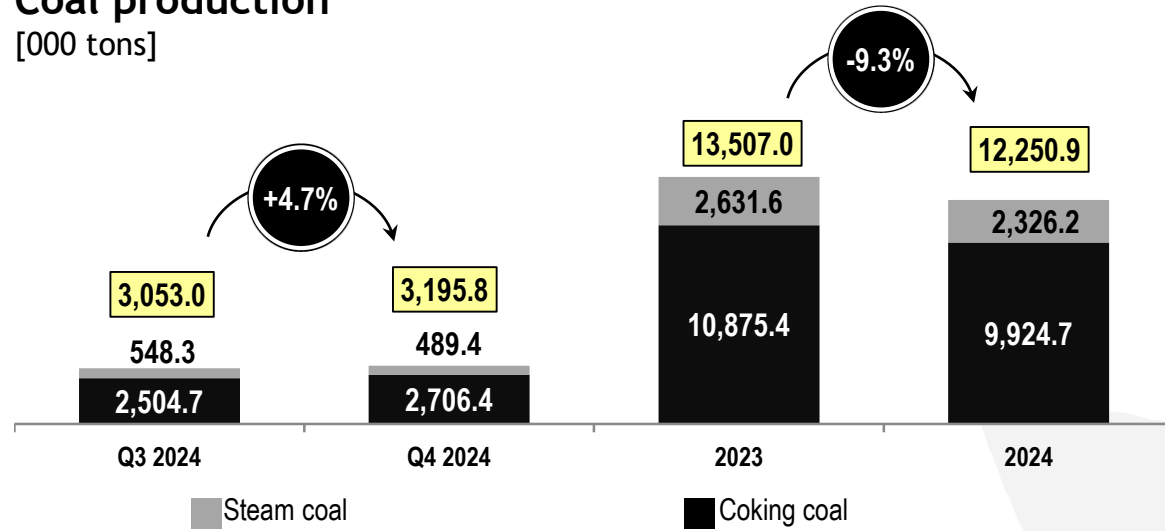


JSW Group's operating results

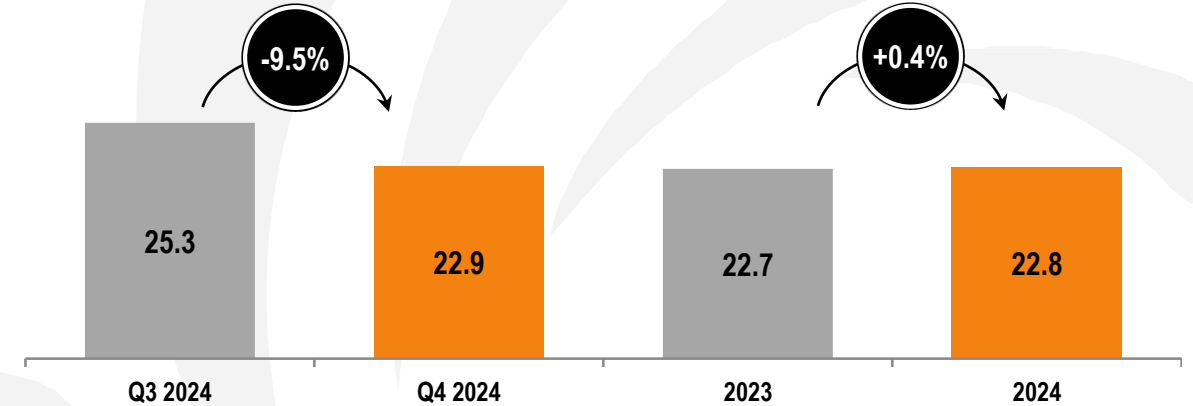


Coal and coke production

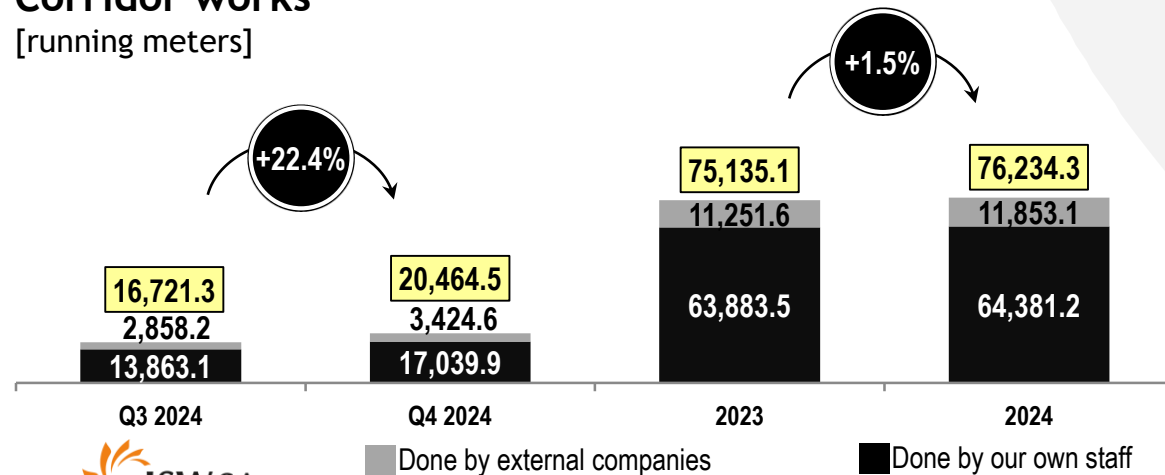
Coal production
[000 tons]



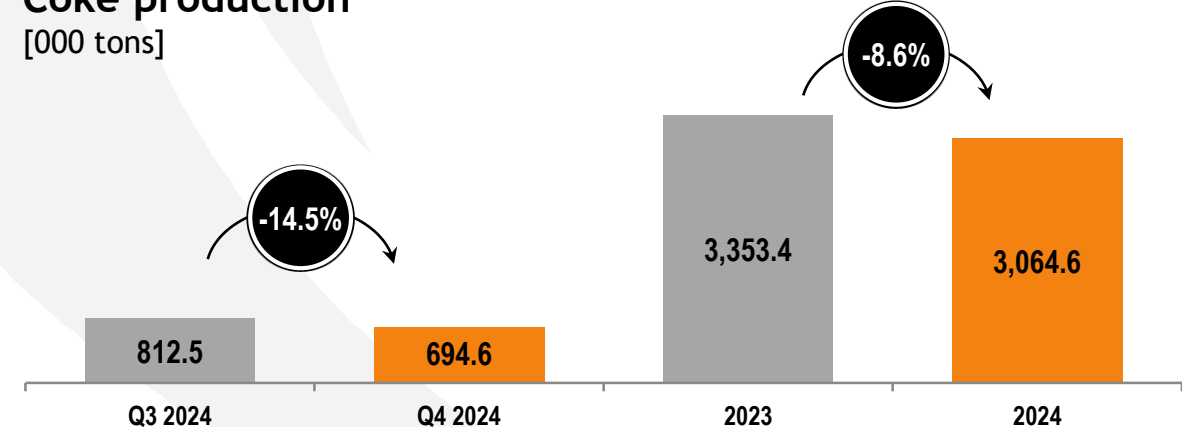
Active longwalls
[number]



Corridor works
[running meters]



Coke production
[000 tons]





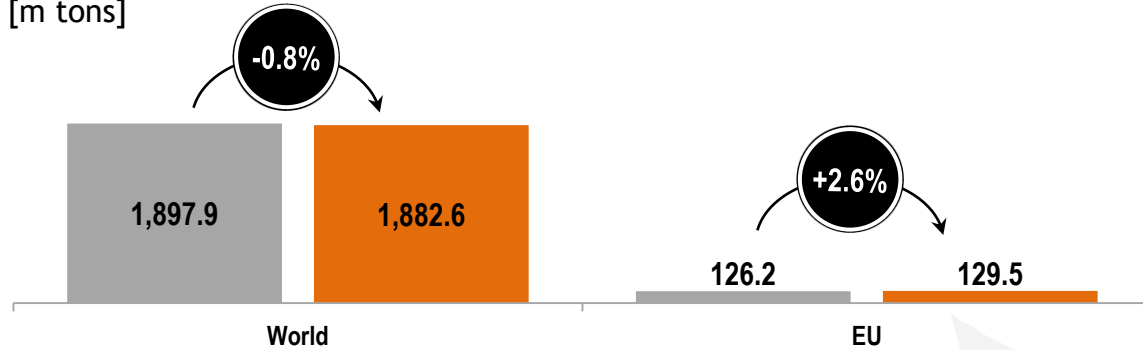
Market environment



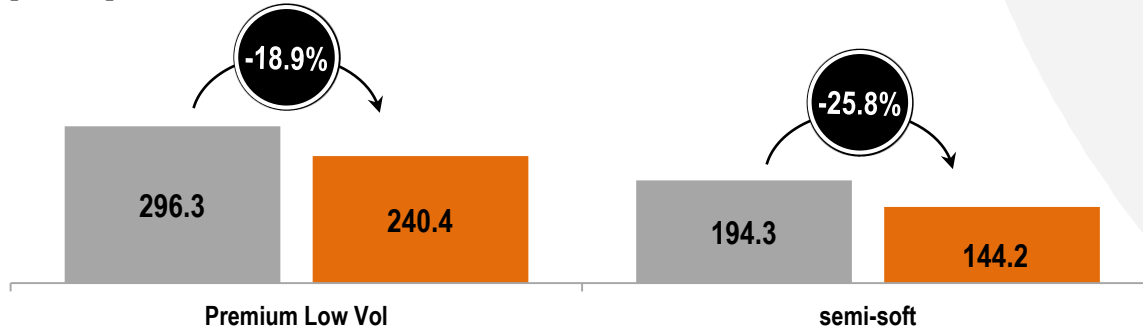
Market trends

2024 vs. 2023 ratio comparison

Steel production [m tons]

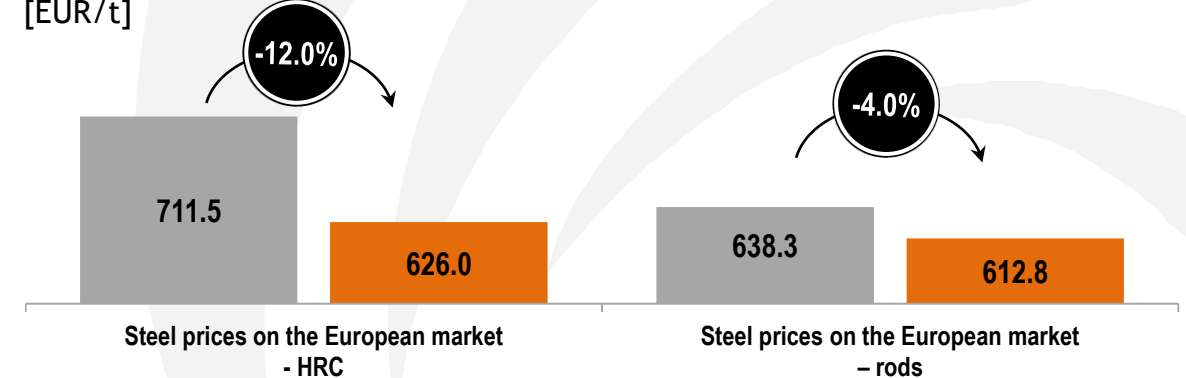


Coking coal spot prices* [USD/t]

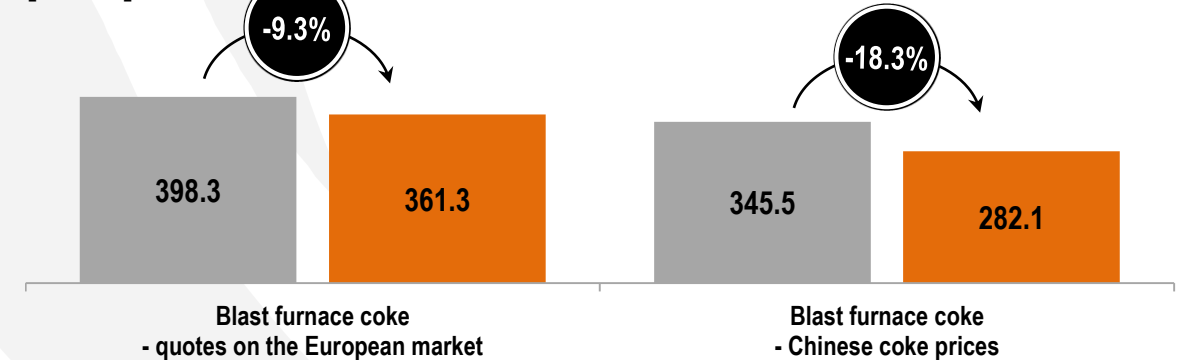


* taking into account the quotations affecting JSW prices in a given year (the average price from October 2023 - November 2024), the decrease in the average reference price of coking coal in 2024 versus 2023 was -9% (TSI Premium hard: 290 USD/t in 2023; 263 USD/t in 2024)

Steel prices on the European market [EUR/t]



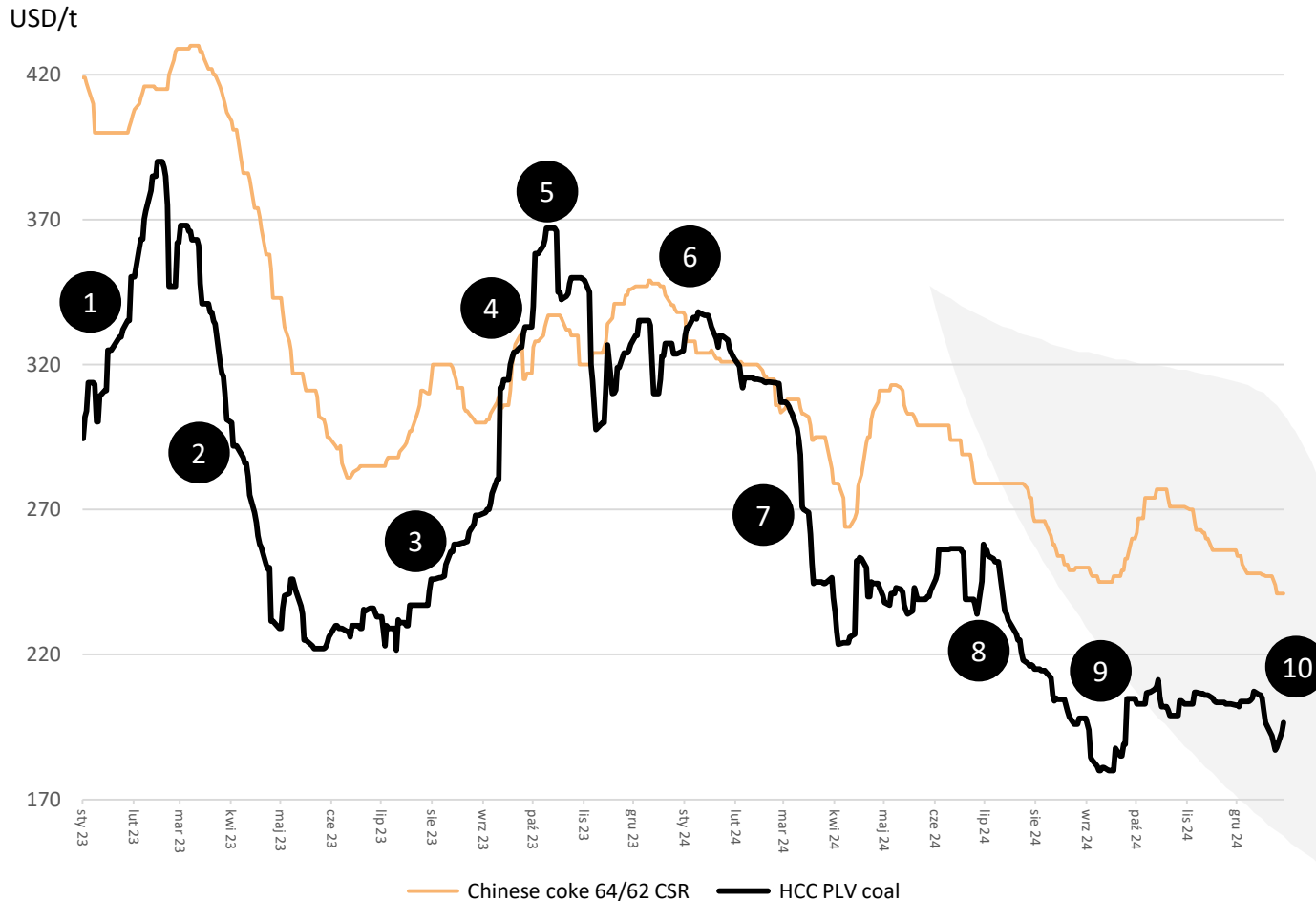
Coke prices** [USD/t]



** taking into account the quotations affecting JSW prices in a given year (the average price from Q4 2023 - Q3 2024), the decrease in the average reference price of coke in 2024 vs. 2023 was about 12%. (blast-furnace coke on the European Market: 413 USD/t in 2023, 364 USD/t in 2024)

Global coking coal and coke market

Key price drivers in 2023 and 2024



1. Supply disruption in Australia, sudden increase in HCC PLV quotes.
2. Recovery of supply and a simultaneous decline in demand in India.
3. Recovery of inventory in India after the monsoon period.
4. Accident at the Peak Downs mine (Australia).
5. HCC coal prices exceed the prices of Chinese coke; the interest in buying coke instead of coal is growing.
6. Lower availability of Chinese coke, higher interest in coal.
7. Despite critically low inventories, India has reduced coal purchases while waiting for the minimum level to which prices can fall.
8. Fires in Grosvenor (Australia) and Longview (USA) mines have not stopped the decline in coal prices.
9. Instead of rebuilding its coal inventories after the monsoon season, India intensifies coke purchases; the availability of Indonesian coal is increasing.
10. To protect domestic coking plants, India is introducing import quota for coke.

Market of the JSW Group

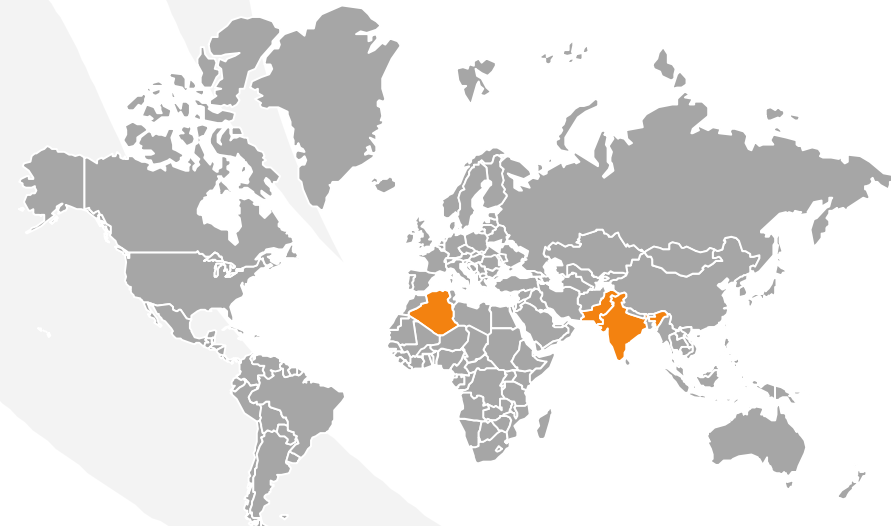
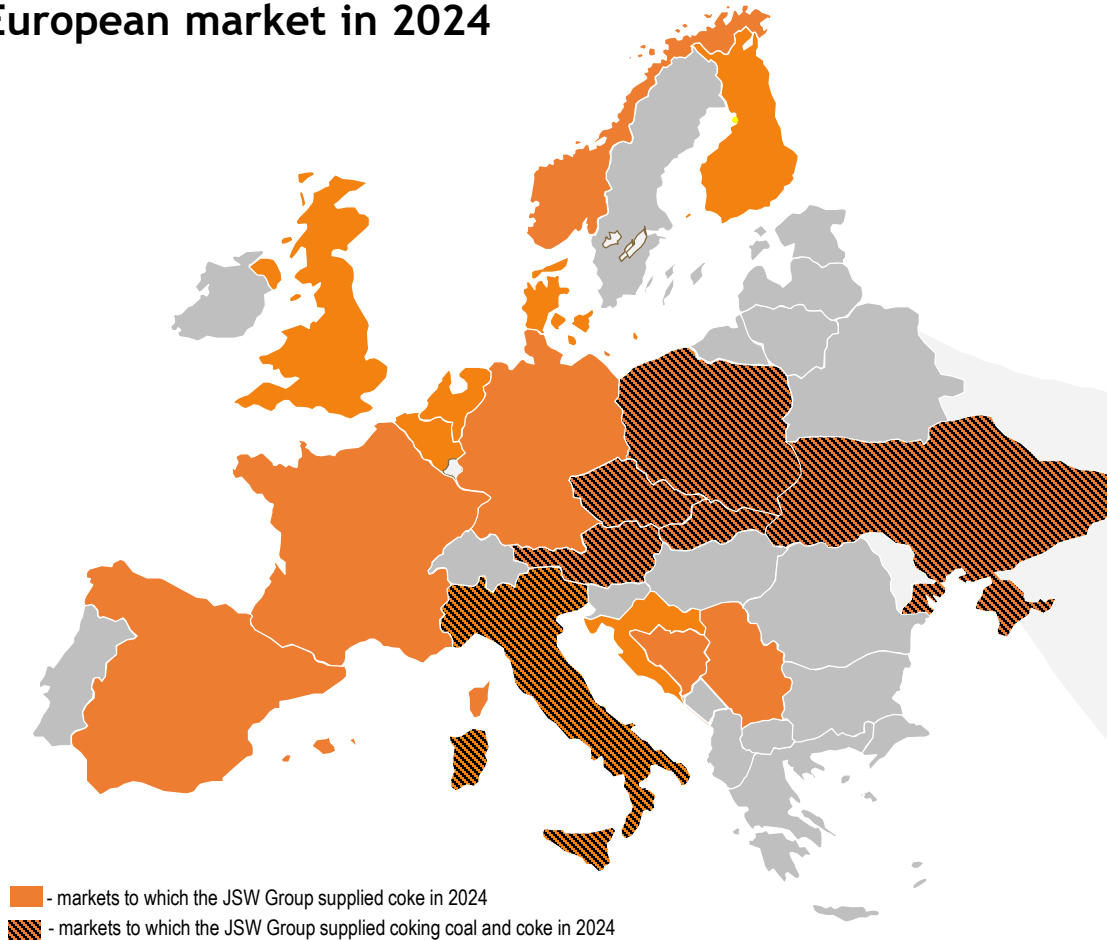
Target countries for JSW Group products in 2024

European market in 2024

Europe is the target market for coking coal.

The coke market is much more extensive, since coke is sold on overseas markets, including India.

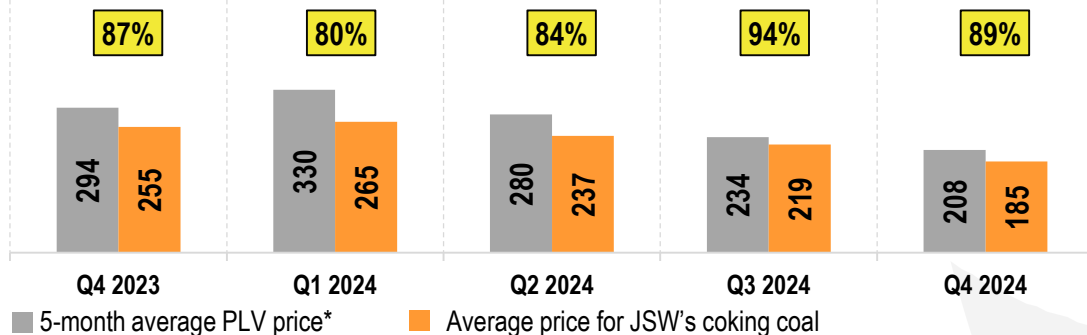
Overseas markets in 2024



Prices of JSW's products

in relation to market prices

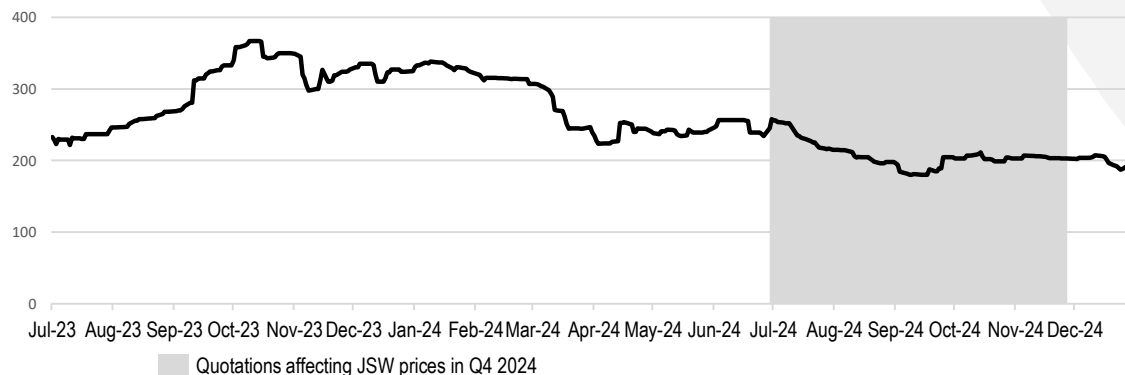
Ceny węgla koksowego JSW w relacji do notowań Premium Low Vol [USD/t]



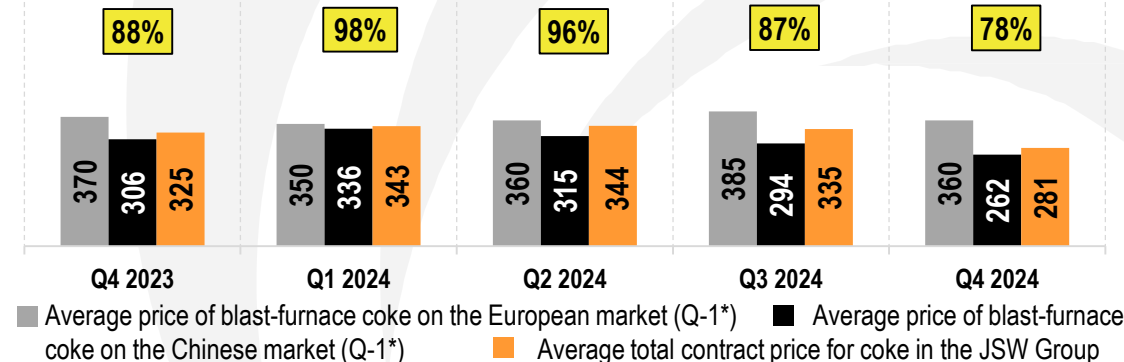
* The 5-month average of the Premium Low Vol price covers the previous quarter and two first months of the current quarter

Premium Low Vol coal spot prices

July 2023 - December 2024 [USD/t]

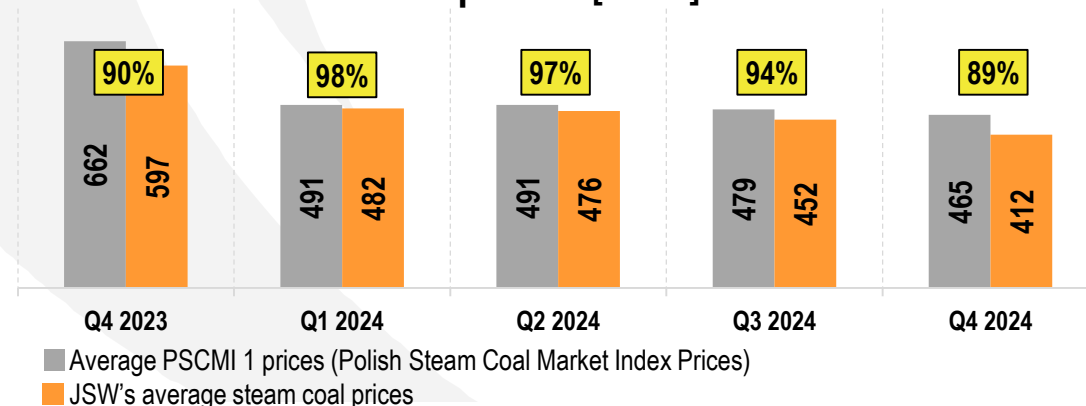


JSW's coke prices in relation to prices of blast furnace coke on the European market [USD/t]



* coke prices are set at the turn of each quarter in order to reflect the market terms of the negotiations. The optimal approach is to compare the prices obtained in the respective quarter with the average quotations from the previous quarter.

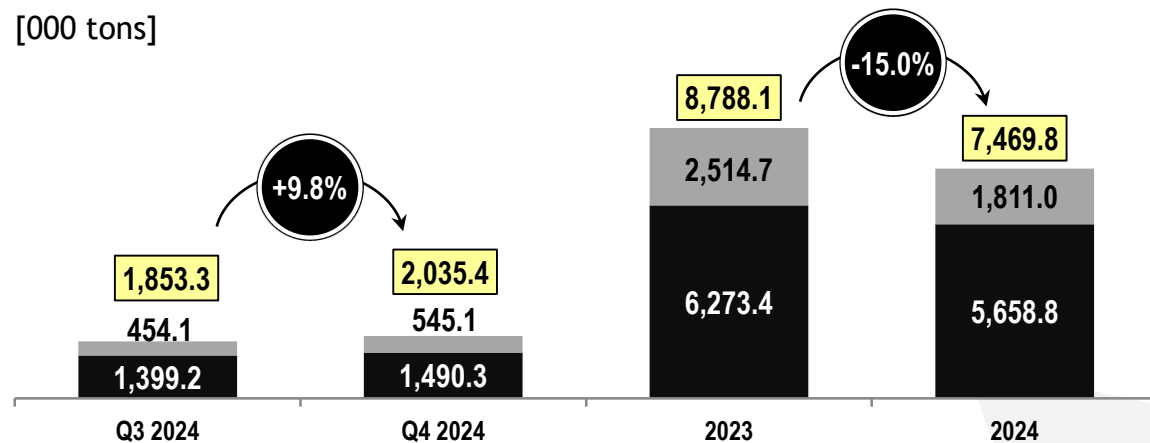
JSW steam coal price in relation to PSCMI 1 prices [PLN/t]



Sales of coal produced in the JSW Group

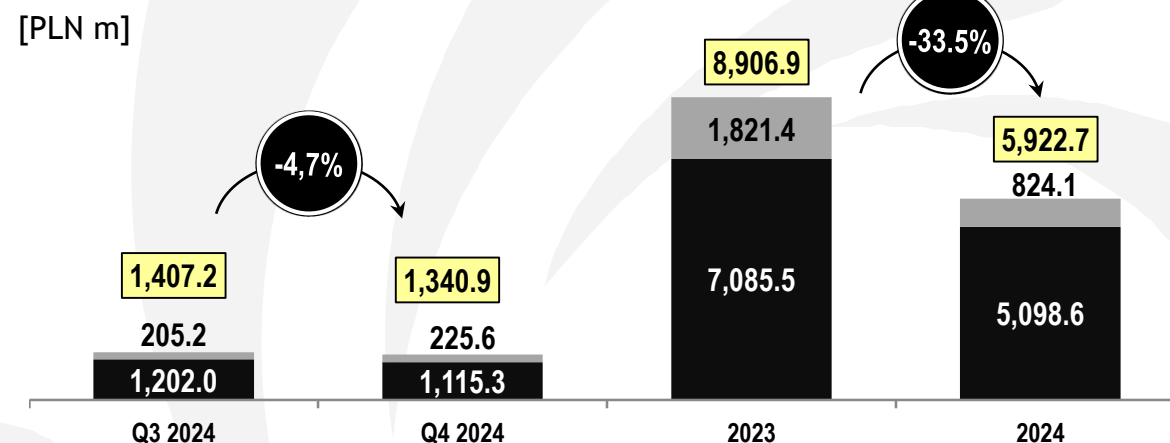
Sales of coal to external customers

[000 tons]



Revenues on sales of coal to external customers*

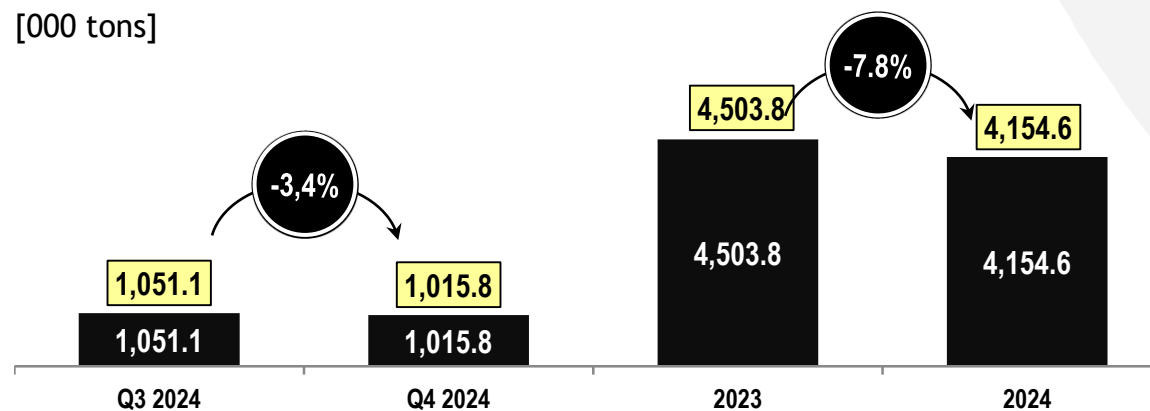
[PLN m]



* This figure takes into account the Group's revenues from coal sales (including the coal produced by other entities) and the adjustment of sales revenues on account of realization of hedging transactions

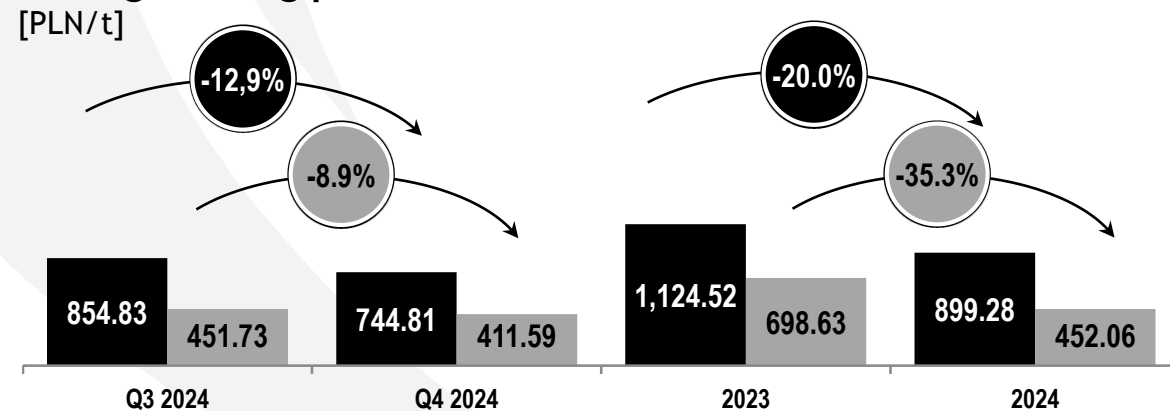
Sales of coal to internal customers

[000 tons]



Average selling price of coal to external customers

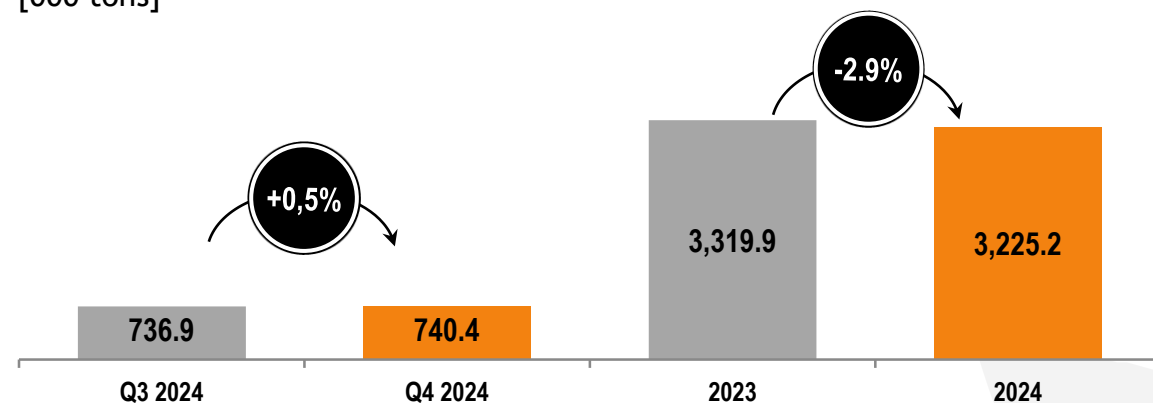
[PLN/t]



Sales of coke produced in the JSW Group

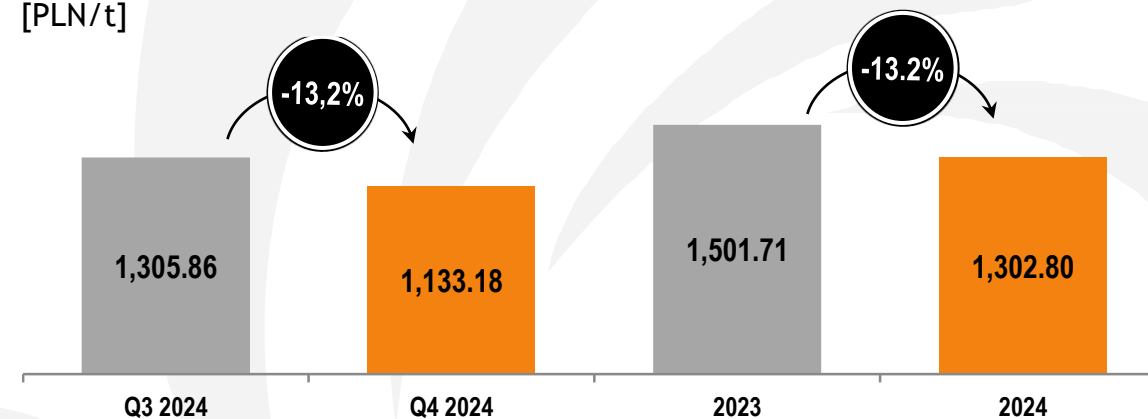
Sales of coke to external customers

[000 tons]



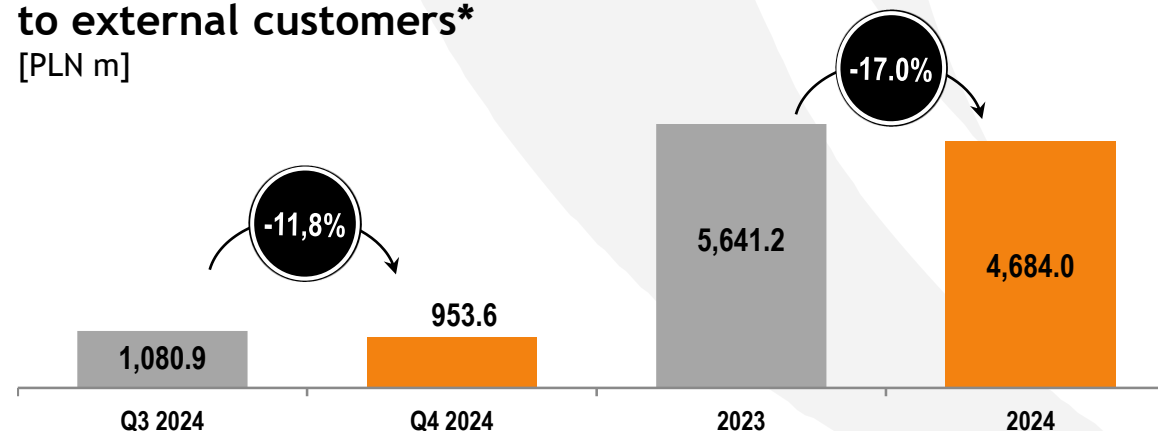
Average coke sales price

[PLN/t]



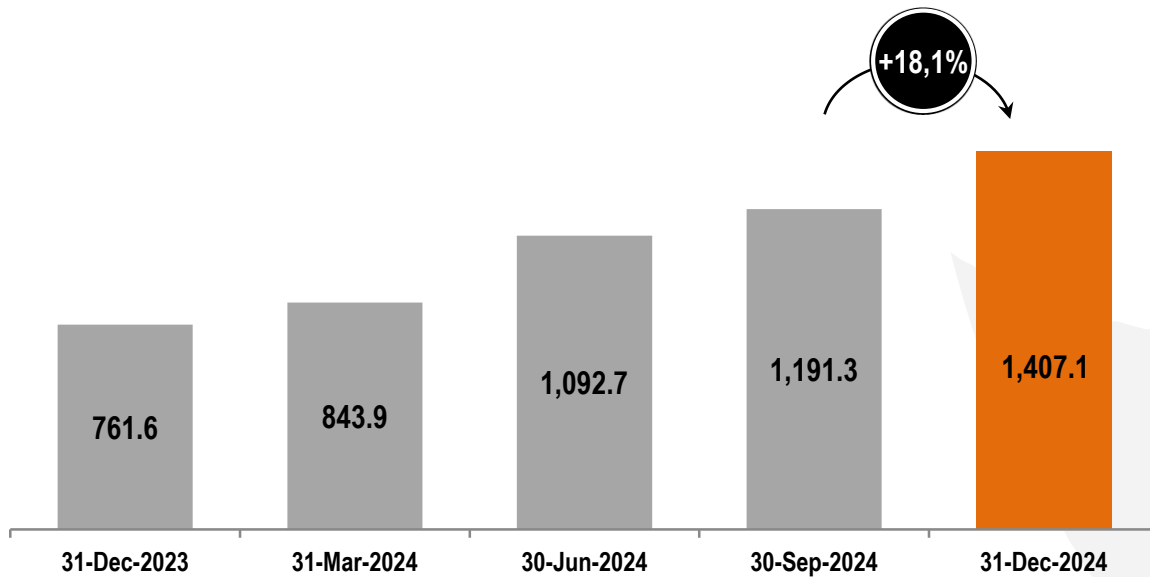
Revenues on sales of coke and hydrocarbons to external customers*

[PLN m]

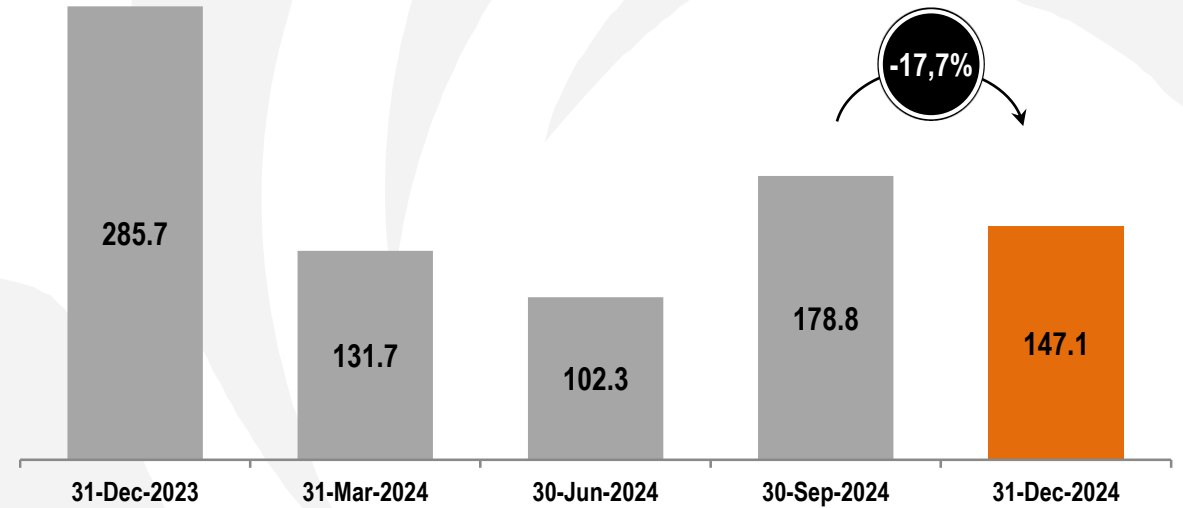


Inventories of coal and coke produced in the JSW Group

Coal inventory
as at [000 tons]



Coke inventory
as at [000 tons]



Total coal inventory is comprised of:

- operational reserve in mines required for scheduled shipments
- technological reserve in coking plant necessary for safe operation of coke oven batteries

The inventory of coke is comprised of:

- operational reserve in coking plants required for scheduled overland shipments
- operational reserve in ports required for scheduled ocean shipments



Investments of the JSW Group

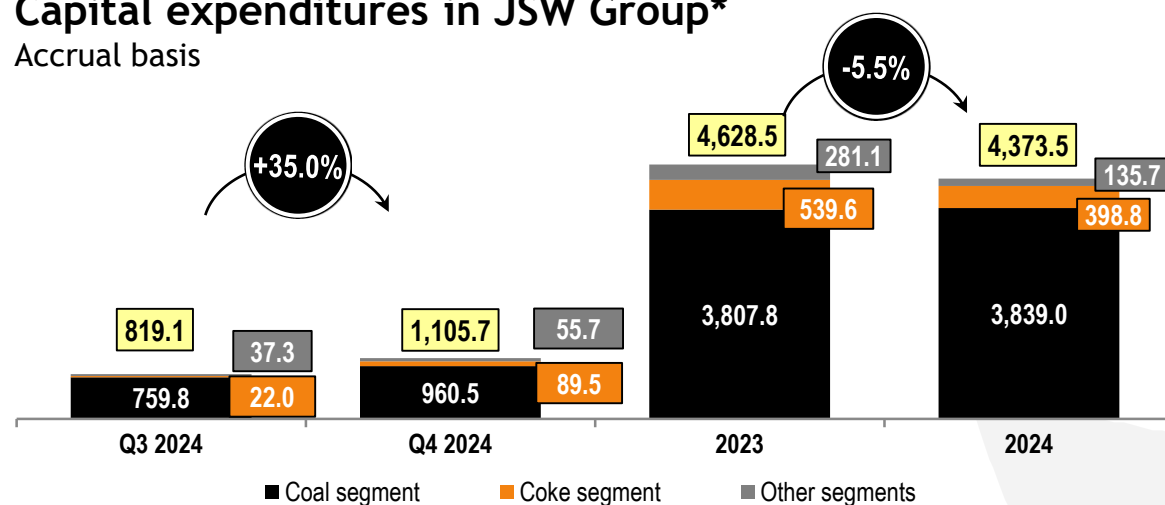


Investments of the JSW Group

[PLN m]

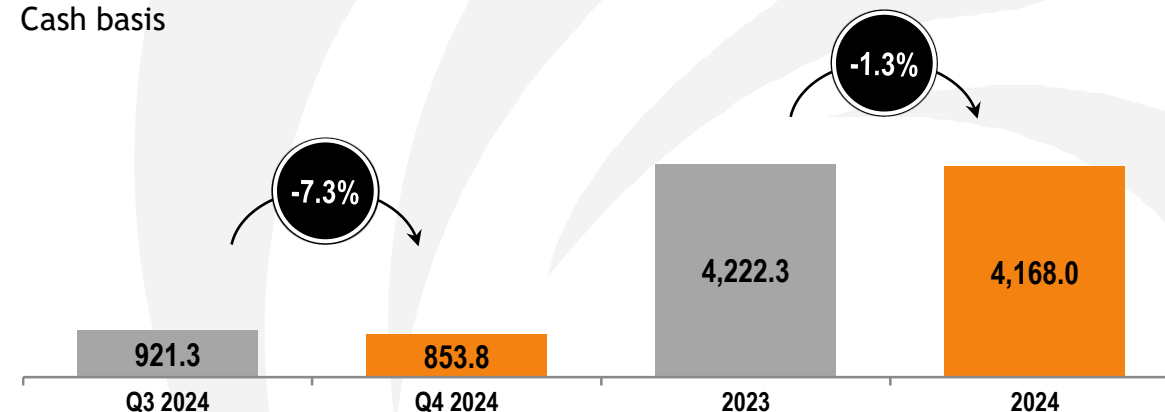
Capital expenditures in JSW Group*

Accrual basis



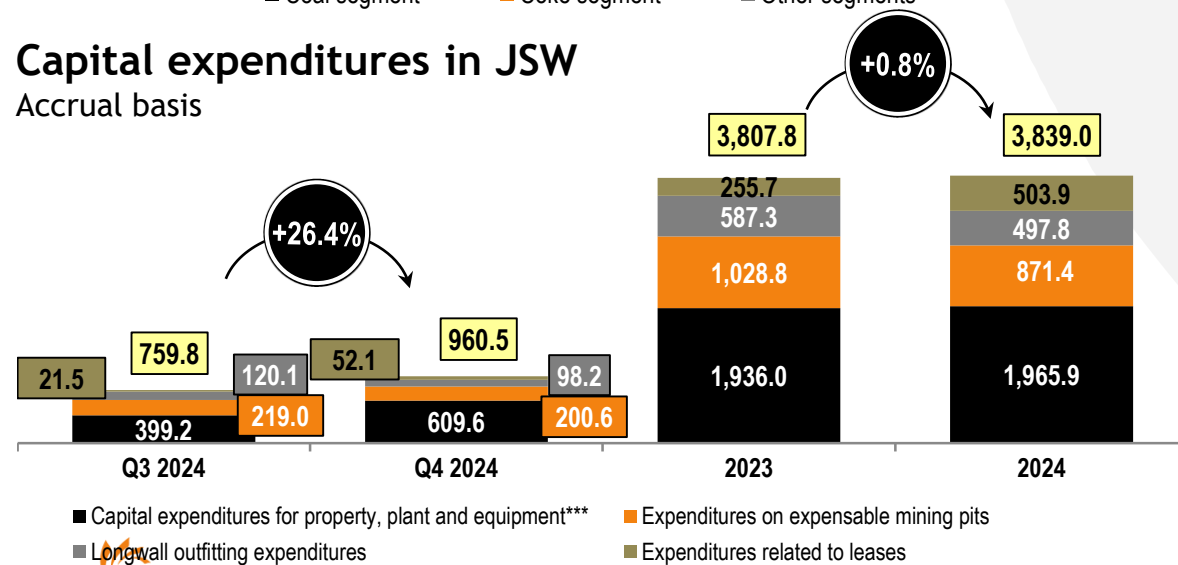
Capital expenditures in JSW Group**

Cash basis



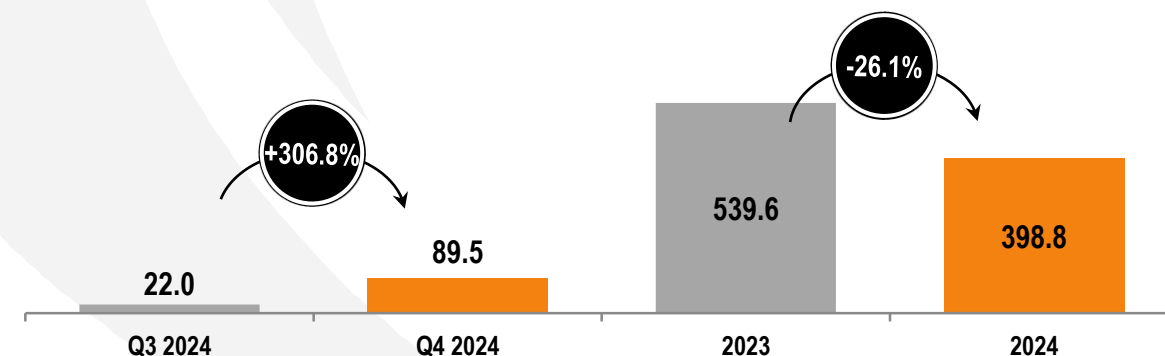
Capital expenditures in JSW

Accrual basis



Capital expenditures in JSW KOKS

Accrual basis



* net of consolidation eliminations

** capital expenditures include the purchase of property, plant and equipment, intangible assets and lease payments

*** expenditures on property, plant and equipment, intangible assets, investment properties and borrowing costs



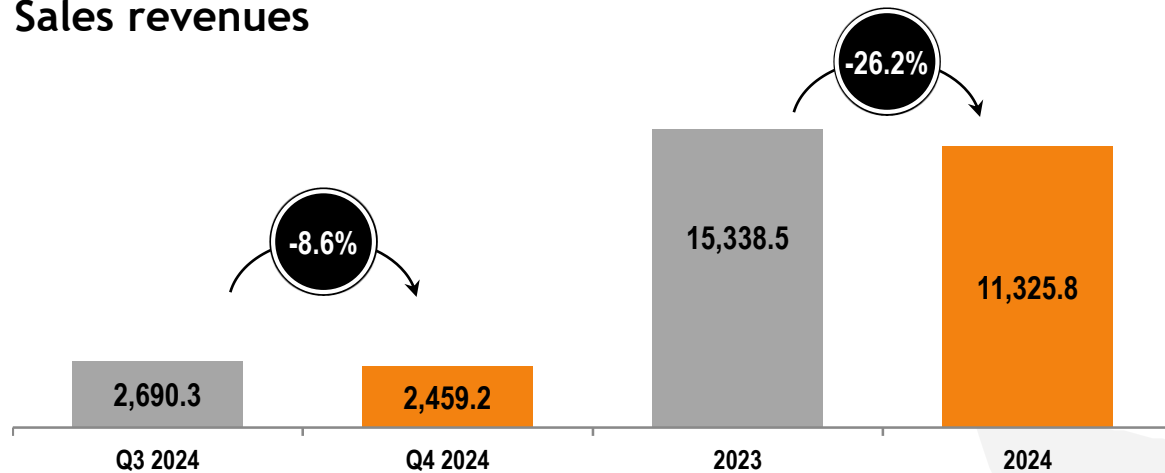
JSW Group's financial highlights



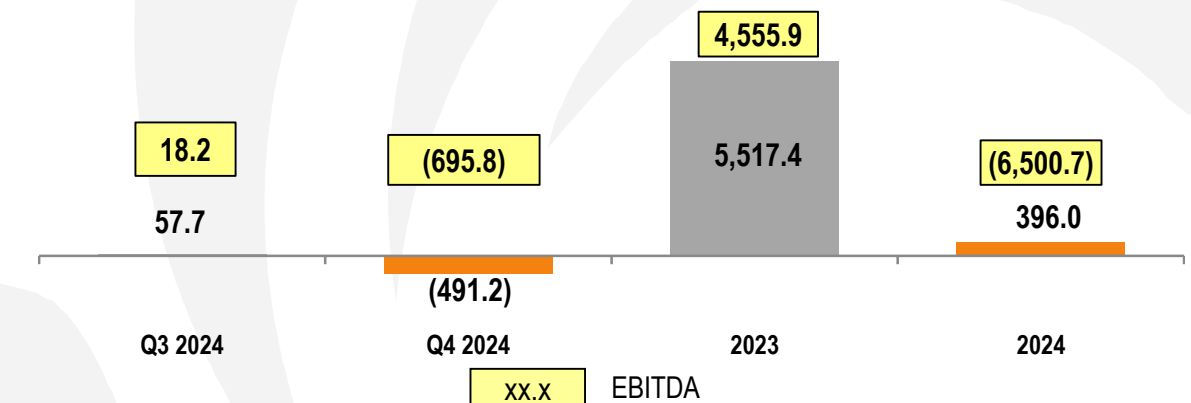
JSW Group's financial highlights

[PLN m]

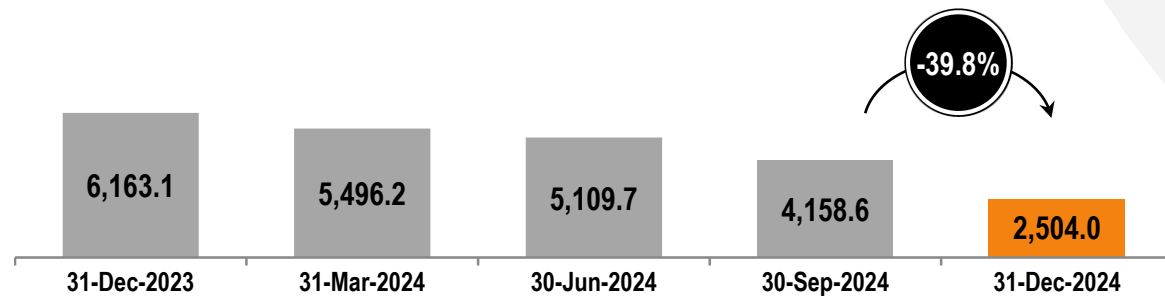
Sales revenues



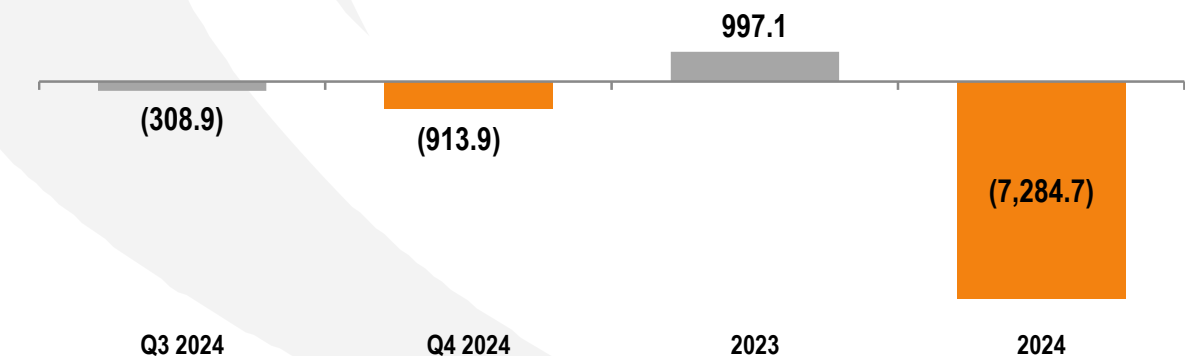
EBITDA net of non-recurring events



Net working capital (incl. FIZ)

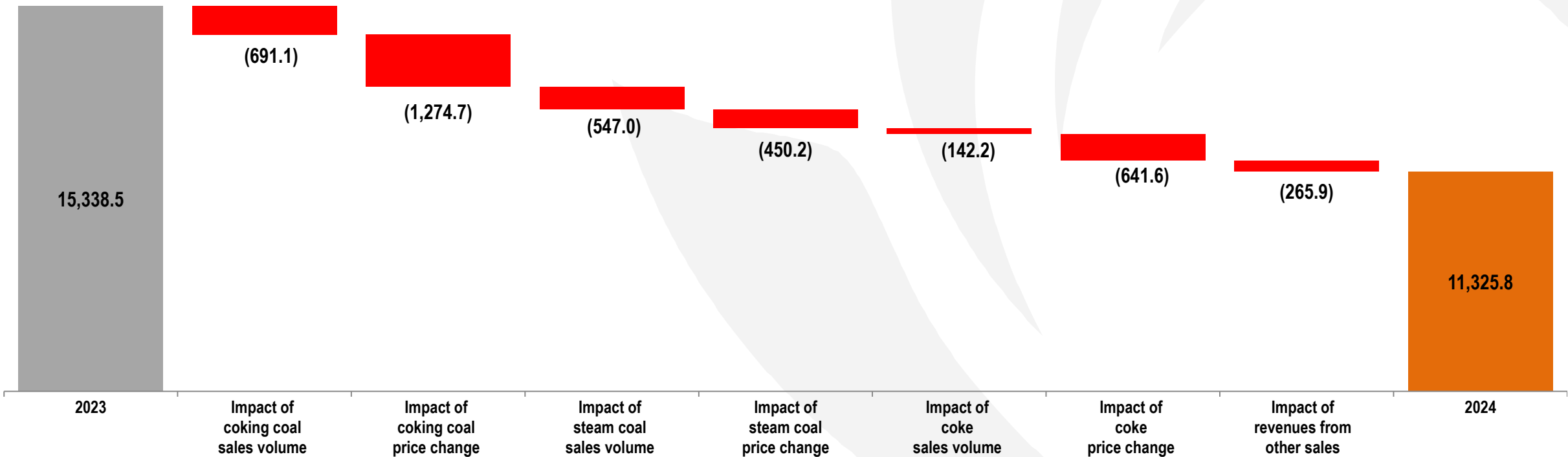


Net result



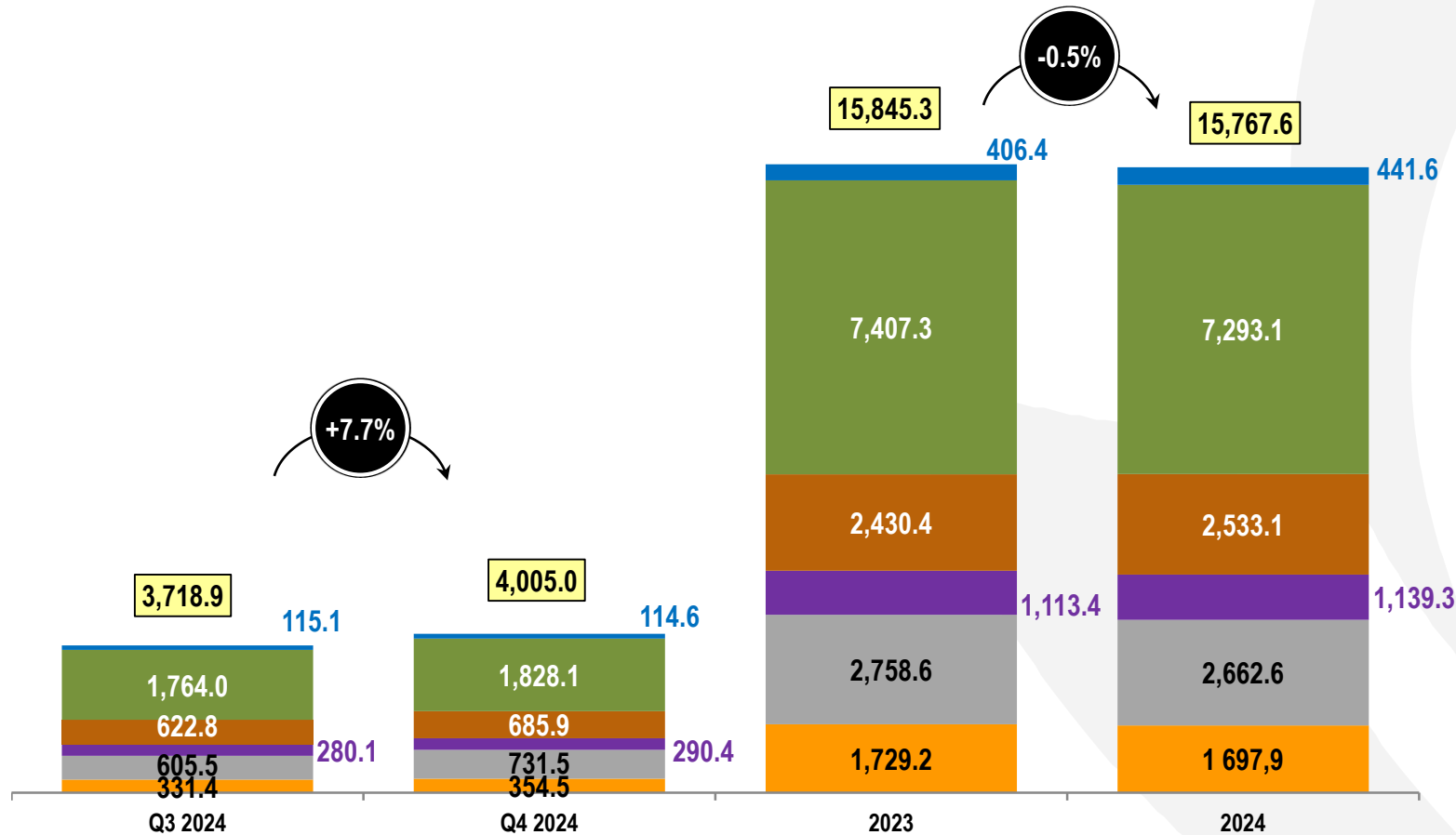
Change in sales revenues of the JSW Group

[PLN m]



JSW Group's expenses by nature

[PLN m]

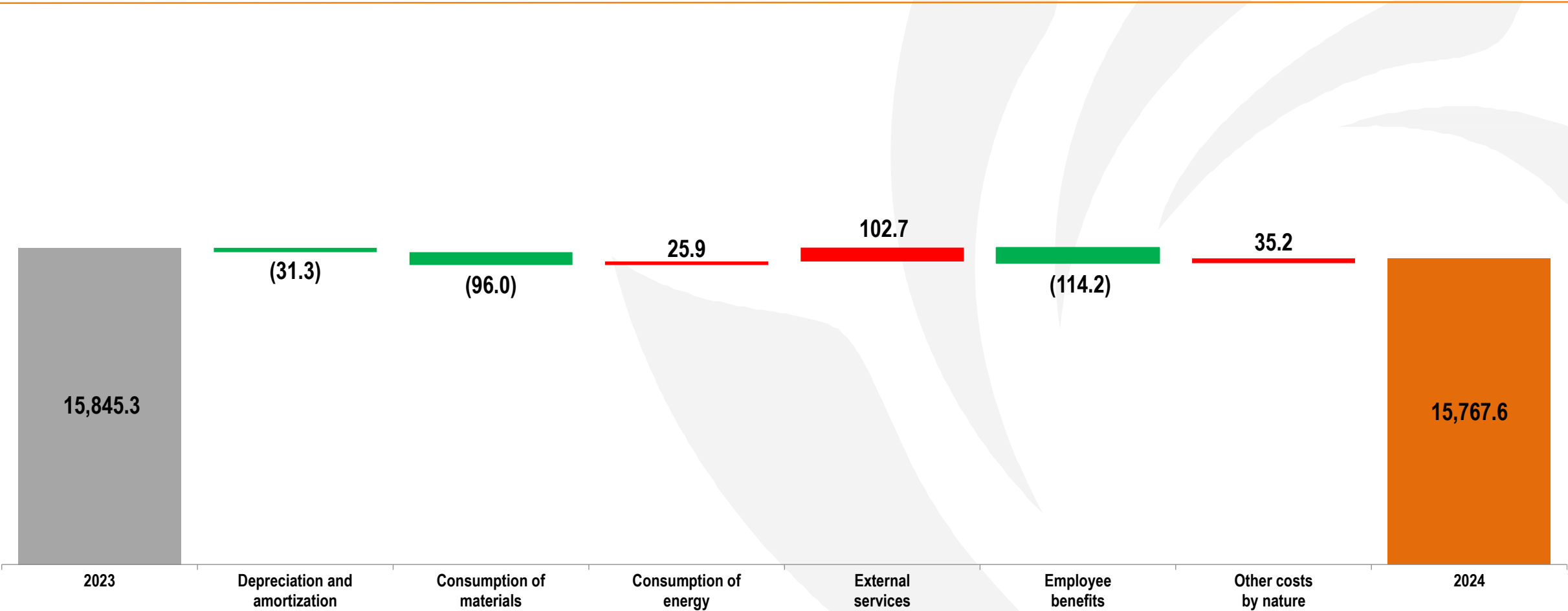


Highest decline in 2024 vs. 2023 in the following items:

- Employee benefits (PLN -114.2 million)
- Consumption of materials (PLN -96.0 million)
- Depreciation and amortization (PLN -31.3 million)

■ Depreciation and amortization ■ Materials ■ Energy ■ External services ■ Employee benefits ■ Other costs by nature

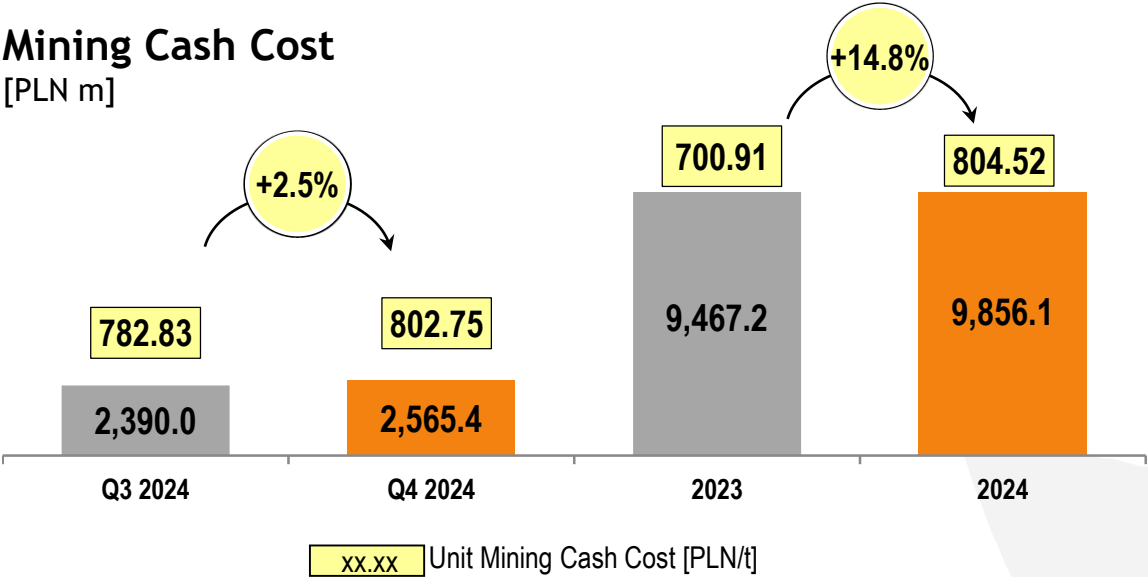
Cost change drivers, by type, in the JSW Group [m PLN]



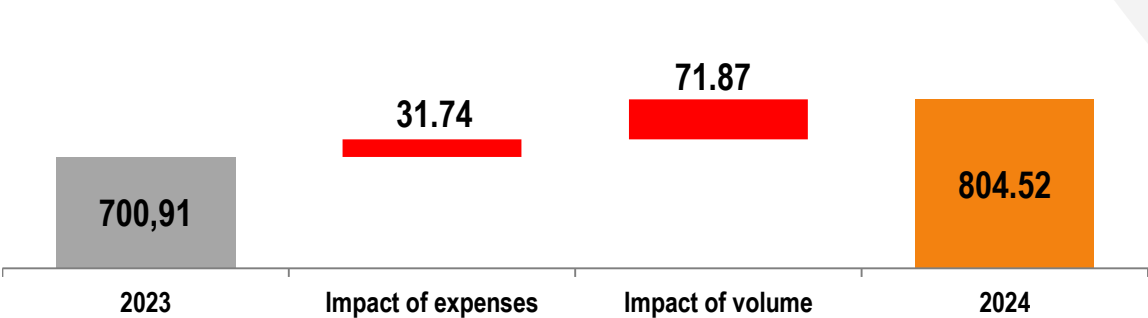
Mining Cash Cost

Cash Conversion Cost

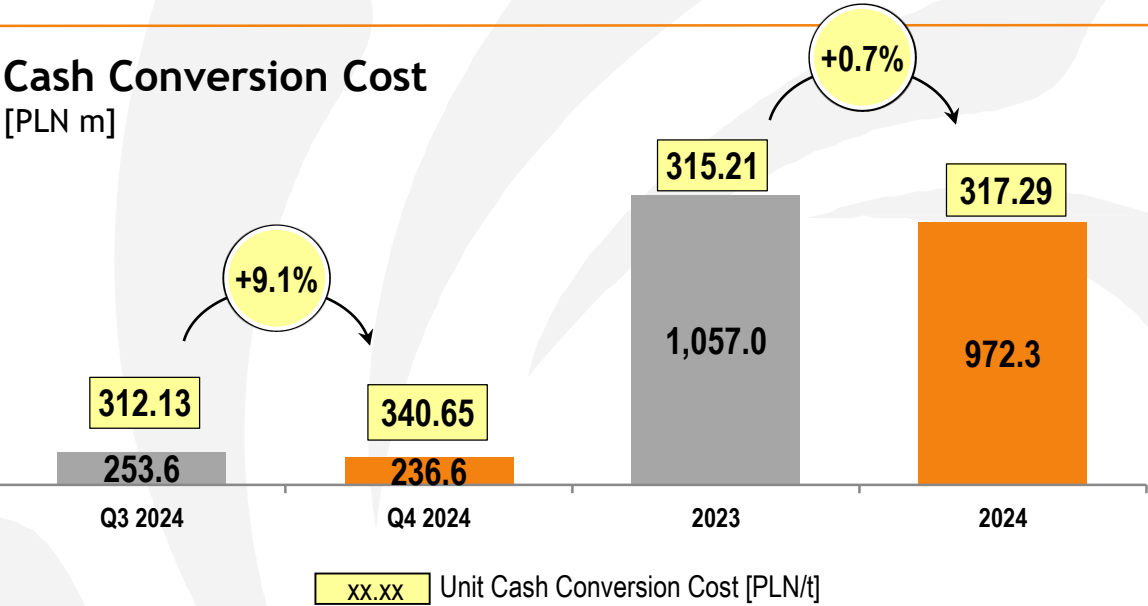
Mining Cash Cost
[PLN m]



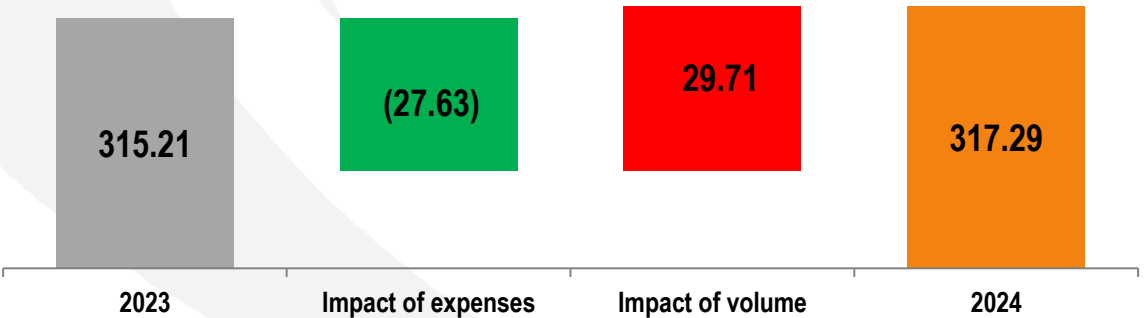
Unit Mining Cash Cost
[PLN/t]



Cash Conversion Cost
[PLN m]

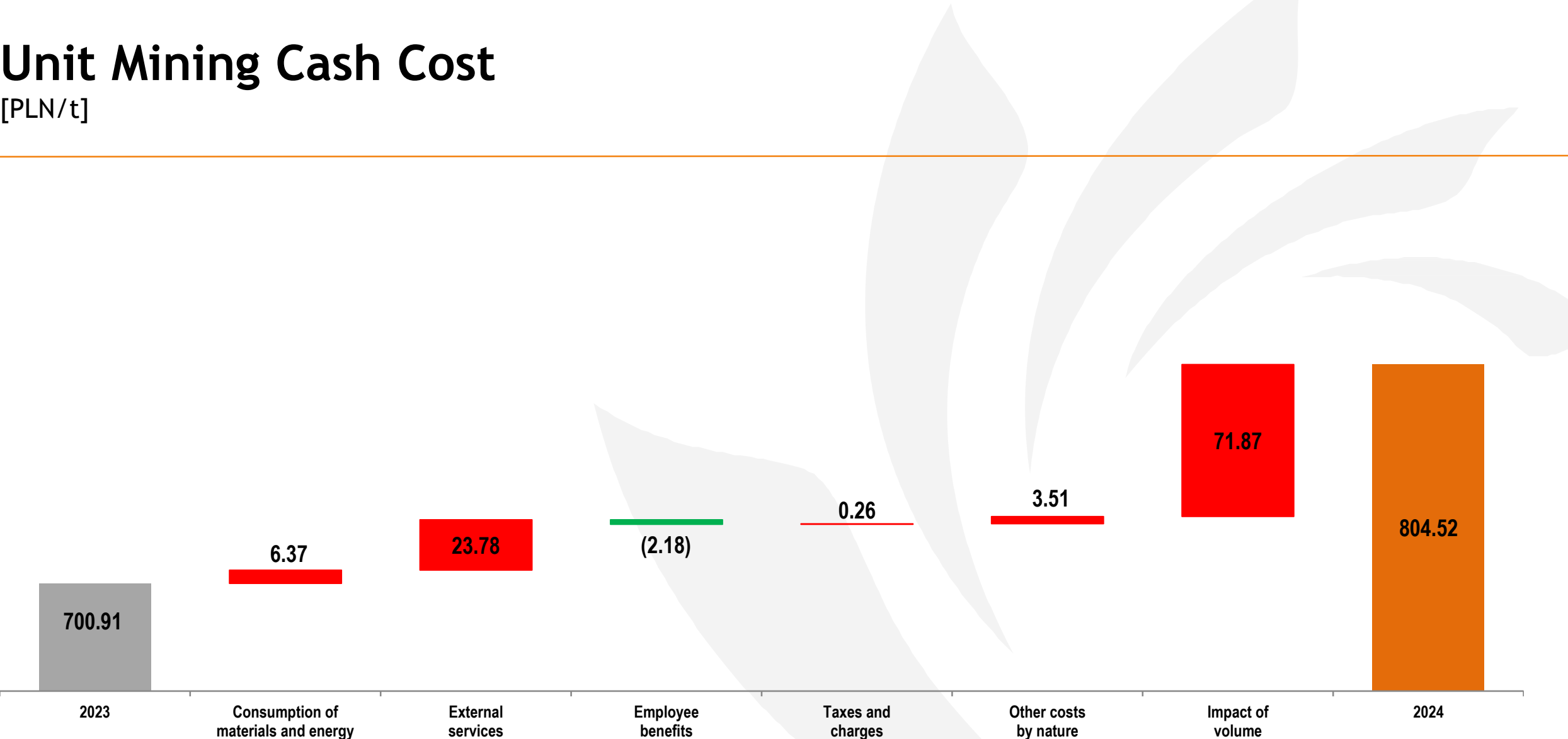


Unit Cash Conversion Cost
[PLN/t]



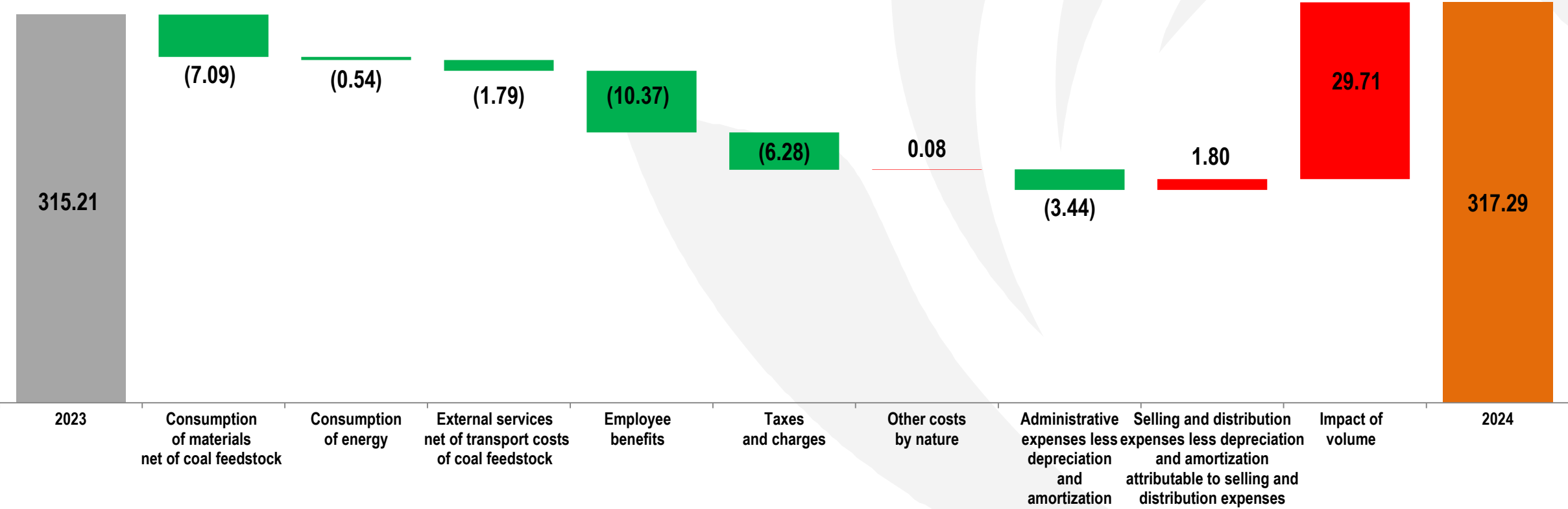
Unit Mining Cash Cost

[PLN/t]



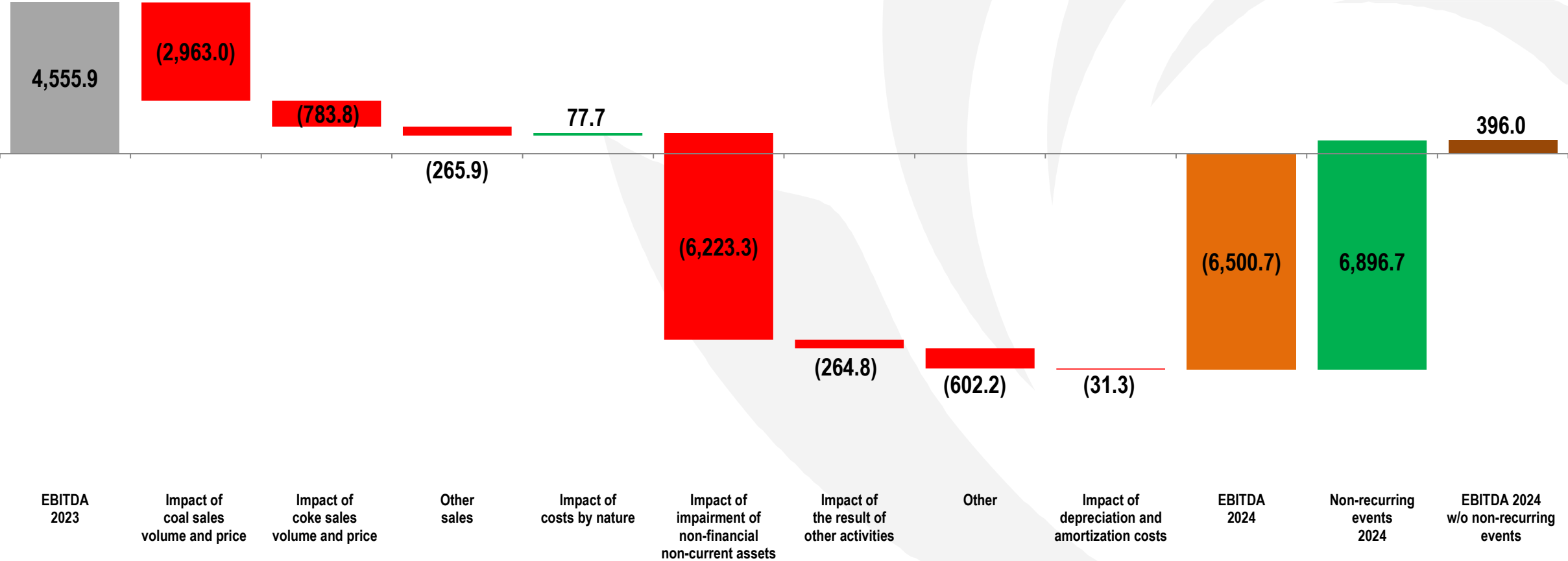
Unit Cash Conversion Cost

[PLN/t]

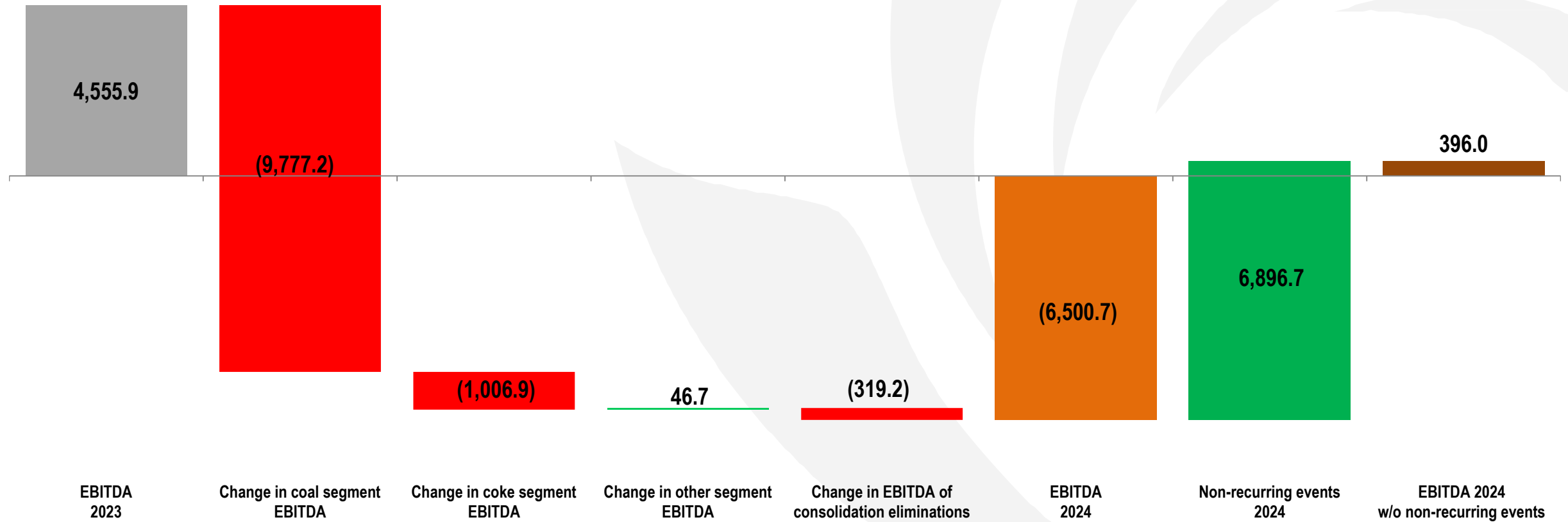


JSW Group's EBITDA drivers

[PLN m]



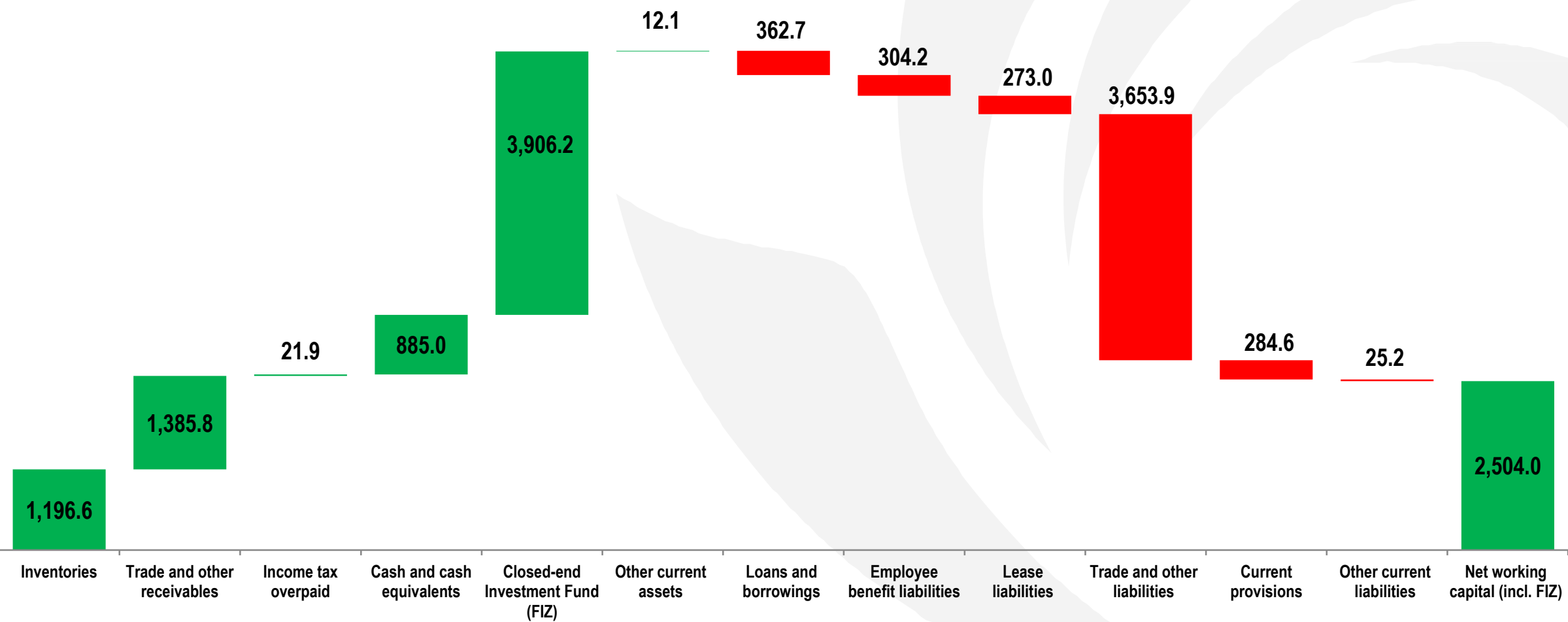
Impact of operating segments on EBITDA change in JSW Group [m PLN]



Net working capital (incl. FIZ) of the JSW Group

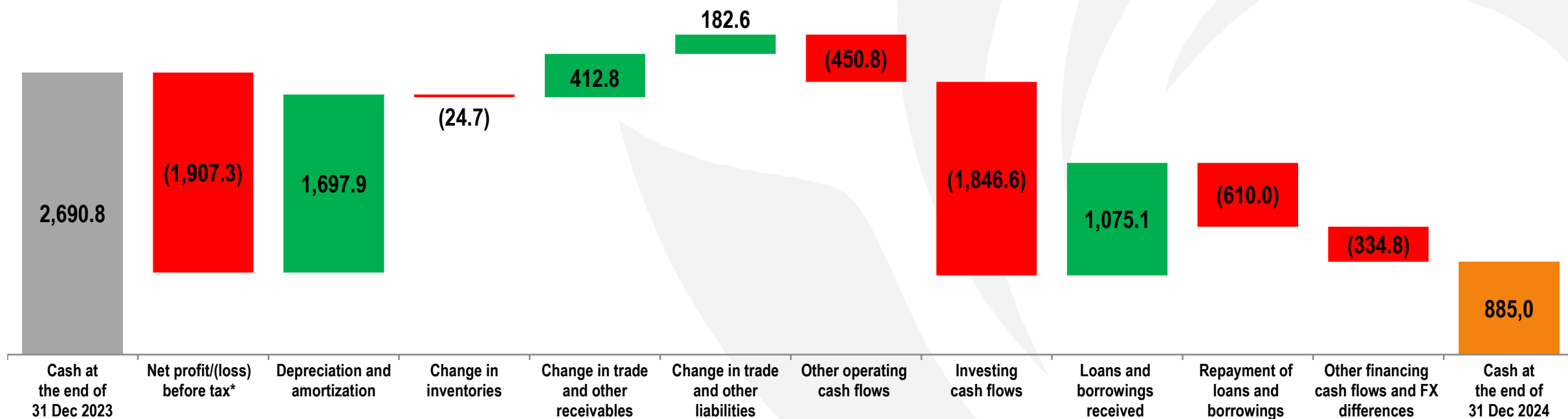
[PLN m]

As at 31 December 2024



JSW Group's cash flows

[PLN m]

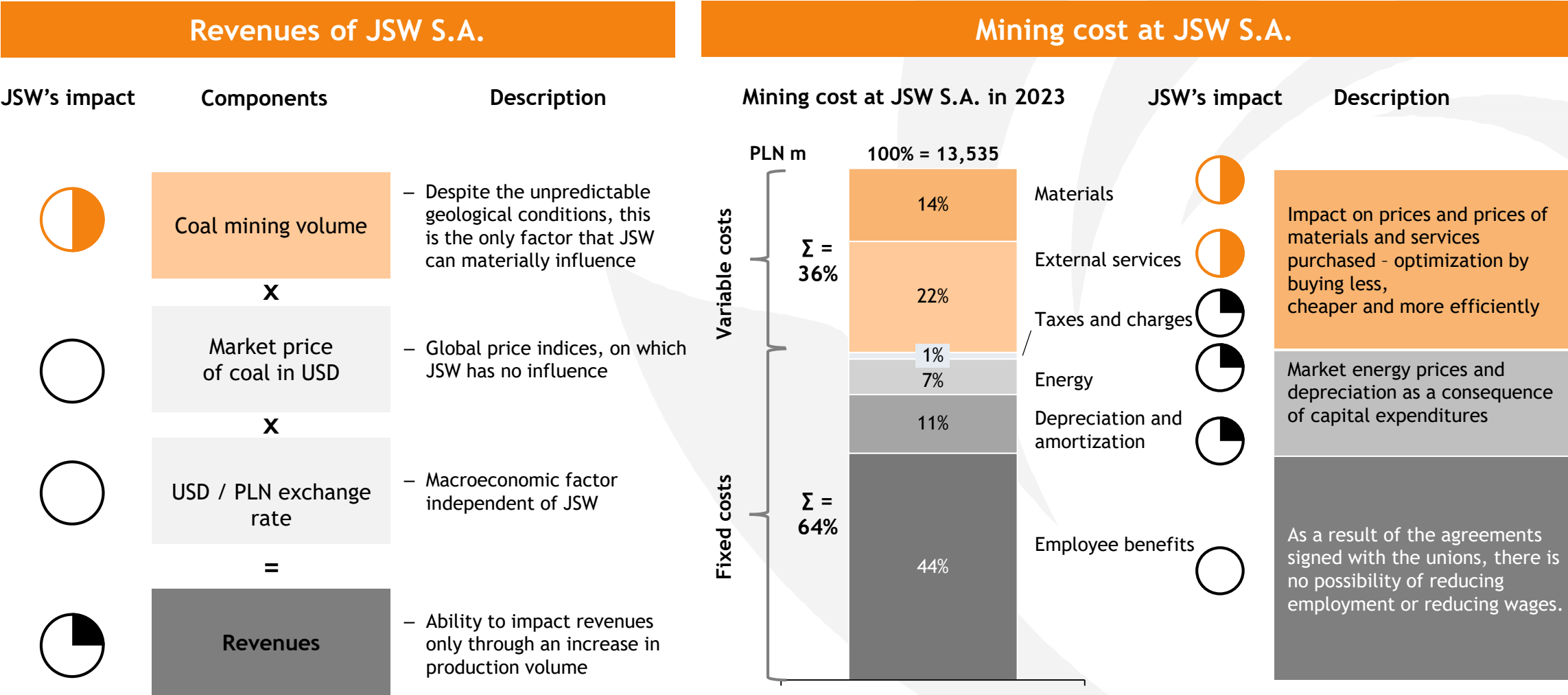




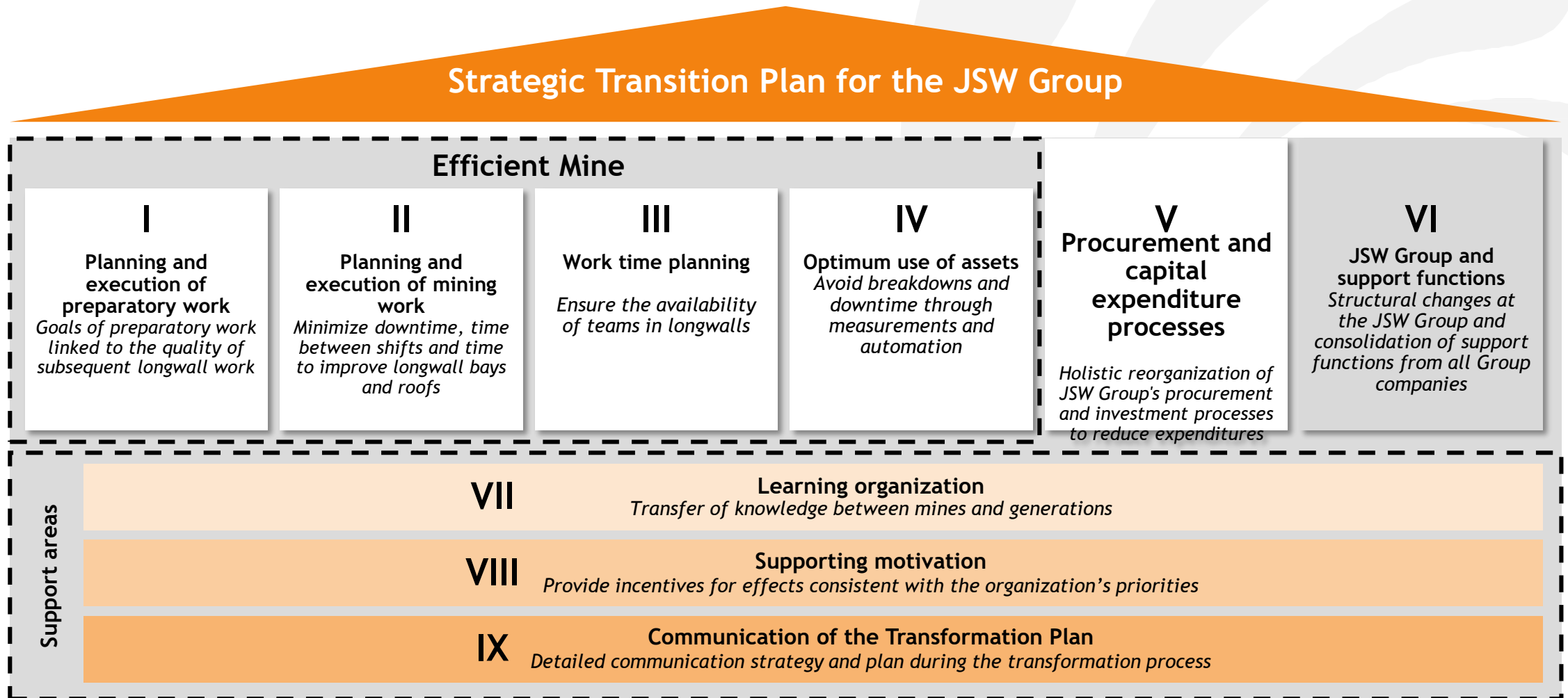
Strategic Transformation Plan of the JSW Group



The Strategic Transformation Program focuses on the levers that do not require additional consultations with stakeholders



Key financial effects in 2025 were planned in the Efficient Mine stream and in the Procurement and capital expenditure processes streams



First effects of the implementation of JSW's Strategic Transformation Plan.

Key achievements after the first 3 months:

● Revision of planned capital expenditures

This has allowed us to reduce inefficient capital expenditures in 2025 by **PLN 1.2 billion** compared to H1 2024.

● Savings in the procurement area

We recorded savings of about PLN 80 million in H2 2024, and in the January-February 2025 period alone, additional **PLN 152 million**.

● Initiatives to increase output

In the last quarter 2024 we already started to use longwall shearers in a better way, which has allowed us to mine more coking coal

● Projected results

The implementation of initiatives in four key areas of the Strategic Transformation Plan: mining efficiency, procurement optimization, rationalization of capital expenditures and support function optimization - scheduled through 2027 will enable the Company to **continue to grow, increase output and operate stably** in the years ahead.



For us and for the future generation!



Q&A





Appendices



Impact of non-recurring events on JSW Group's EBITDA

[PLN m]

	Q3 2024	Q4 2024	2023	2024
Sales revenues	2,690.3	2,459.2	15,338.5	11,325.8
EBIT	(313.2)	(1,050.3)	2,826.7	(8,198.6)
EBITDA	18.2	(695.8)	4,555.9	(6,500.7)
<i>Impact of non-recurring events on results</i>	39.5	204.6	961.5	6,896.7
▪ recognition of impairment loss allowance for non-financial non-current assets	27.8	89.0	236.6	6,971.0
▪ reversal of the impairment loss allowance for non-financial non-current assets	(0.4)	(2.9)	(13.6)	(520.5)
▪ costs of the one-time award paid at JSW	142.2	101.4	616.5	243.6
▪ estimate cost of the one-time award in JSW	(144.2)	8.2	-	152.5
▪ one-time award in Group companies	10.4	8.9	66.7	19.3
▪ costs of incidents in JSW's mines	3.6	20.8	53.5	50.5
▪ support from the government's energy-intensive sectors aid program	-	(27.5)	(18.6)	(27.5)
▪ unexploited capitalized costs of the longwall areas in JSW Units	-	6.2	8.1	6.2
▪ costs related to the incident at the Przyjaźń Coking Plant	0.1	0.5	12.3	1.6
EBITDA (net of non-recurring events)	57.7	(491.2)	5,517.4	396.0

Production, external sales, inventories of coal and coke produced in the JSW Group

[000 tons]

Item	Q3 2024	Q4 2024	2023	2024	Change Q4 2024/ Q3 2024	Change 2024/2023
▪ Coking coal production	2,504.7	2,706.4	10,875.4	9,924.7	8.1%	-8.7%
▪ Steam coal production	548.3	489.4	2,631.6	2,326.2	-10.7%	-11.6%
▪ Coke production	812.5	694.6	3,353.4	3,064.6	-14.5%	-8.6%
▪ External sales of coking coal	1,399.2	1,490.3	6,273.4	5,658.8	6.5%	-9.8%
▪ External sales of steam coal	454.1	545.1	2,514.7	1,811.0	20.0%	-28.0%
▪ External sales of coke	736.9	740.4	3,319.9	3,225.2	0.5%	-2.9%
▪ Inventory of coking coal produced in the Group	345.4	601.2	517.3	601.2	74.1%	16.2%
▪ Inventory of steam coal produced in the Group	845.9	805.9	244.3	805.9	-4.7%	229.9%
▪ Inventory of coal produced in the Group	1,191.3	1,407.1	761.6	1,407.1	18.1%	84.8%
▪ Inventory of coke produced in the Group	178.8	147.1	285.7	147.1	-17.7%	-48.5%

Mining Cash Cost

[PLN m]

Item	Q3 2024	Q4 2024	2023	2024	Change Q4 2024/ Q3 2024	Change 2024/2023
■ Consumption of materials and energy	555.5	606.3	2,182.3	2,260.4	9.1%	3.6%
■ External services	597.4	655.1	2,094.9	2,386.3	9.7%	13.9%
■ Employee benefits	1,171.7	1,232.6	4,968.5	4,941.8	5.2%	-0.5%
■ Taxes and charges	43.0	46.1	172.9	176.0	7.2%	1.8%
■ Other costs by nature	22.4	25.3	48.6	91.6	12.9%	88.5%
■ Total Mining Cash Cost [PLN m]	2,390.0	2,565.4	9,467.2	9,856.1	7.3%	4.1%
■ Coal production [000 tons]	3,053.0	3,195.8	13,507.0	12,250.9	4.7%	-9.3%
■ Unit Mining Cash Cost [PLN/t]	782.83	802.75	700.91	804.52	2.5%	14.8%
■ One-off payments to employees	(2.1)	108.8	612.1	393.1	-	-35.8%
■ Unit Mining Cash Cost [PLN/t] net of payments to employees	783.50	768.70	655.59	772.43	-1.9%	17.8%

Cash Conversion Cost

[PLN m]

Item	Q3 2024	Q4 2024	2023	2024	Change Q4 2024/ Q3 2024	Change 2024/2023
▪ Consumption of materials net of coal feedstock	23.3	19.6	113.2	91.5	-15.9%	-19.2%
▪ Energy consumption	20.8	20.5	92.8	91.1	-1.4%	-1.8%
▪ External services net of transport costs of coal feedstock	75.0	71.7	307.5	302.0	-4.4%	-1.8%
▪ Employee benefits	83.1	83.5	342.1	310.3	0.5%	-9.3%
▪ Taxes and charges	33.2	22.4	126.7	107.5	-32.5%	-15.2%
▪ Other costs by nature	0.8	0.7	2.6	2.8	-12.5%	7.7%
▪ Administrative expenses less depreciation and amortization	25.4	25.5	108.8	98.3	0.4%	-9.7%
▪ Selling and distribution expenses less depreciation and amortization attributable to selling and distribution expenses	(8.0)	(7.3)	(36.7)	(31.2)	-8.8%	-15.0%
▪ Total Cash Conversion Cost [PLN m]	253.6	236.6	1,057.0	972.3	-6.7%	-8.0%
▪ Volume of coke produced for sale [000 tons]	812.5	694.6	3,353.4	3,064.6	-14.5%	-8.6%
▪ Unit Cash Conversion Cost [PLN/t]	312.13	340.65	315.21	317.29	9.1%	0.7%

Financial standing of the JSW Group

[PLN m]

Item	31.12.2023	31.03.2024	30.06.2024	30.09.2024	31.12.2024	Change 31.12.2024/ 31.12.2023	Change 31.12.2024/ 30.09.2024
ASSETS	27,793.8	25,704.9	23,218.7	23,483.6	22,873.0	-17.7%	-2.6%
Non-current assets	22,095.9	21,375.6	18,595.6	19,132.8	18,868.0	-14.6%	-1.4%
- Property, plant and equipment	13,023.1	13,560.7	7,830.2	8,298.0	8,883.1	-31.8%	7.1%
- Intangible assets	198.7	225.3	218.3	150.8	147.7	-25.7%	-2.1%
- Investment property	21.8	21.6	21.4	21.2	21.1	-3.2%	-0.5%
- Right-of-use assets	590.0	584.4	396.2	398.1	408.6	-30.7%	2.6%
- Investments in associates	1.2	1.2	1.3	1.3	1.3	8.3%	0.0%
- Deferred tax assets	326.2	361.4	1,154.4	1,237.2	1,455.6	346.2%	17.7%
- Investments in the FIZ asset portfolio	7,476.0	6,143.4	8,479.3	8,527.3	7,453.1	-0.3%	-12.6%
- Other non-current assets	458.9	477.6	494.5	498.9	497.5	8.4%	-0.3%
Current assets	5,697.9	4,329.3	4,623.1	4,350.8	4,005.0	-29.7%	-7.9%
- Inventories	1,171.9	950.0	1,130.9	1,248.5	1,196.6	2.1%	-4.2%
- Trade and other receivables	1,798.4	1,628.2	1,637.9	1,433.2	1,385.8	-22.9%	-3.3%
- Overpaid income tax	9.1	0.3	84.4	63.5	21.9	140.7%	-65.5%
- Financial derivatives	27.7	14.6	14.6	32.0	12.0	-56.7%	-62.5%
- Other current financial assets	-	-	-	-	0.1	-	-
- Investments in the FIZ asset portfolio	-	-	506.5	804.4	503.6	-	-37.4%
- Cash and cash equivalents	2,690.8	1,736.2	1,248.8	769.2	885.0	-67.1%	15.1%

Sources of financing for JSW Group's assets

[PLN m]

Item	31.12.2023	31.03.2024	30.06.2024	30.09.2024	31.12.2024	Change 31.12.2024/ 31.12.2023	Change 31.12.2024/ 30.09.2024
EQUITY AND LIABILITIES	27,793.8	25,704.9	23,218.7	23,483.6	22,873.0	-17.7%	-2.6%
Equity	16,971.7	16,962.3	10,936.3	10,648.2	9,746.8	-42.6%	-8.5%
Non-current liabilities	3,811.3	3,766.1	4,289.7	4,115.9	4,172.1	9.5%	1.4%
- Loans and borrowings	782.4	755.5	1,488.8	1,315.3	1,523.2	94.7%	15.8%
- Deferred tax liabilities	55.2	21.1	13.8	19.6	13.9	-74.8%	-29.1%
- Employee benefit liabilities	960.2	963.2	884.7	880.9	767.3	-20.1%	-12.9%
- Provisions	1,484.8	1,496.3	1,400.1	1,414.8	1,392.5	-6.2%	-1.6%
- Lease liabilities	382.4	387.2	367.4	351.0	341.0	-10.8%	-2.8%
- Trade and other liabilities	146.3	142.8	134.9	134.3	134.2	-8.3%	-0.1%
Current liabilities	7,010.8	4,976.5	7,992.7	8,719.5	8,954.1	27.7%	2.7%
- Loans and borrowings	635.8	576.1	518.0	519.3	362.7	-43.0%	-30.2%
- Financial derivatives	5.2	0.8	0.6	1.5	19.1	267.3%	1,173.3%
- Current income tax liabilities	42.5	52.0	17.2	12.6	6.1	-85.6%	-51.6%
- Employee benefit liabilities	293.0	332.0	348.7	288.7	304.2	3.8%	5.4%
- Provisions	292.2	291.8	275.5	271.2	284.6	-2.6%	4.9%
- Lease liabilities	257.9	246.7	269.4	259.3	273.0	5.9%	5.3%
- FIZ liabilities	1,910.0	424.7	3,192.8	4,027.2	4,050.5	112.1%	0.6%
- Trade and other liabilities	3,574.2	3,052.4	3,370.5	3,339.7	3,653.9	2.2%	9.4%



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