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Keeping the World Flowing for Future Generations

Growth+
Delivering our vision

2024 full year results
Tuesday 11 March 2025

Presented by
Kiet Huynh – Chief Executive Officer
Ben Peacock – Chief Financial Officer

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Agenda

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Strong 2024 performance – Growth+ delivering our vision

Key highlights – strong sales growth and margin progress

High single digit OCC[1] sales growth	Margin expansion and ROCE progress	Excellent cash conversion and strong balance sheet	Safety our priority
Group revenue +8.2% OCC[1] £754m	**Adj.[2] operating margin** 23.6% 2023: 22.9%	**Closing net cash** £125m 2023: £134m	**TRIR** 0.22 2023: 0.26
Rotork Service 23% of Group revenue	**ROCE** 37.3% 2023: 33.9%	**Cash conversion** 119% of adj.[2] operating profit NWC/sales: 25% (2023: 27%)	**MSCI ESG rating** 'AAA'

Notes: 1. OCC is organic constant currency results. During the year the calculation of OCC performance was changed from translating reporting period results at the prior period average exchange rates to translating the prior period results at the reporting period's average exchange rates. This change enables greater comparability of results with previous periods. Adjustments for acquisitions and/or disposals are unchanged - acquired businesses are not included until owned for more than one year and are then included on an equal perimeter basis, disposed businesses are excluded entirely. Applying the previous calculation methodology to the 2024 results does not result in a material difference in the OCC performance year on year.
2. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items.

Three years in – the Growth+ strategy is delivering

Highlights 2021-24 – 10.0% sales CAGR OCC[1] and 110bps adjusted margin increase

3-year revenue growth driven by all divisions and Rotork Service

Group revenue

10%

3-year
CAGR OCC[1]

of which Rotork Service

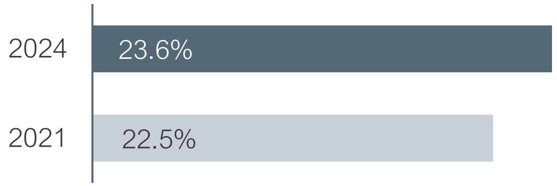
14%

3-year
CAGR OCC[1]

Good margin progression and high return on capital

Adj.[2] profit margin

+110bps



ROCE

+720bps

Notes: 1. OCC is organic constant currency results. During the year the calculation of OCC performance was changed from translating reporting period results at the prior period average exchange rates to translating the prior period results at the reporting period's average exchange rates. This change enables greater comparability of results with previous periods. Adjustments for acquisitions and/or disposals are unchanged - acquired businesses are not included until owned for more than one year and are then included on an equal perimeter basis, disposed businesses are excluded entirely. Applying the previous calculation methodology to the 2024 results does not result in a material difference in the OCC performance year on year.
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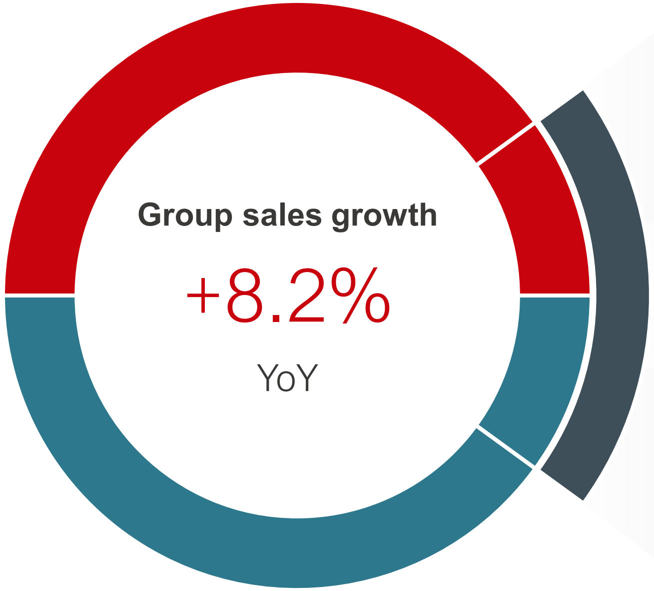
Target Segments and Rotork Service driving our sales growth

Both Target and Core Segments delivered high single digit sales growth in 2024



Target Segments: +9% YoY
High return growth above markets

Including:
- Upstream & midstream electrification
- Critical HVAC and decarbonisation
- Water infrastructure, wastewater and treatment

Rotork Service

Including:
- Field Service and Support Service
- Reliability Service and Connected Service

Core Segments: +8% YoY
High return growth with or above markets

Including:
- Refining and hydrocarbon storage
- Marine and other process industries
- Conventional power generation

Structural growth above markets driven by Target Segments and Rotork Service

Notes: All revenue growth rates are OCC, sales growth rates for Target and Core Segments are management estimates, pie charts show contribution of segments to Group revenue and Rotork Service to segments (management estimates)

Consistent high returns reflect competitive strengths and barriers to entry

Brand strength, reputation, product quality and exceptional service

Key competitive strengths

- Brand and reputation, track record and references
- Product quality and reliability, application expertise
- Customer and end user relationships
- Rotork Service

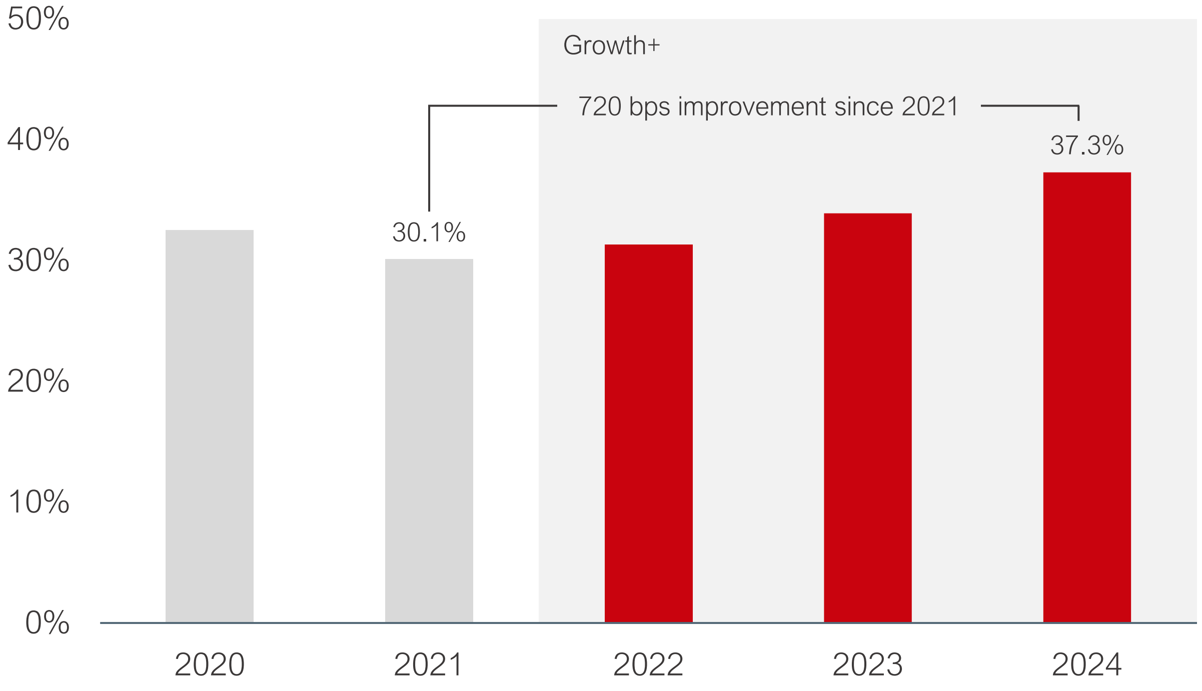
Barriers to entry

- Certification requirements, approved vendor lists
- Breadth and configurability of product range
- Unmatched installed base

Route to market

- Around 45% of sales via OEM / valve maker channels

Return on Capital Employed

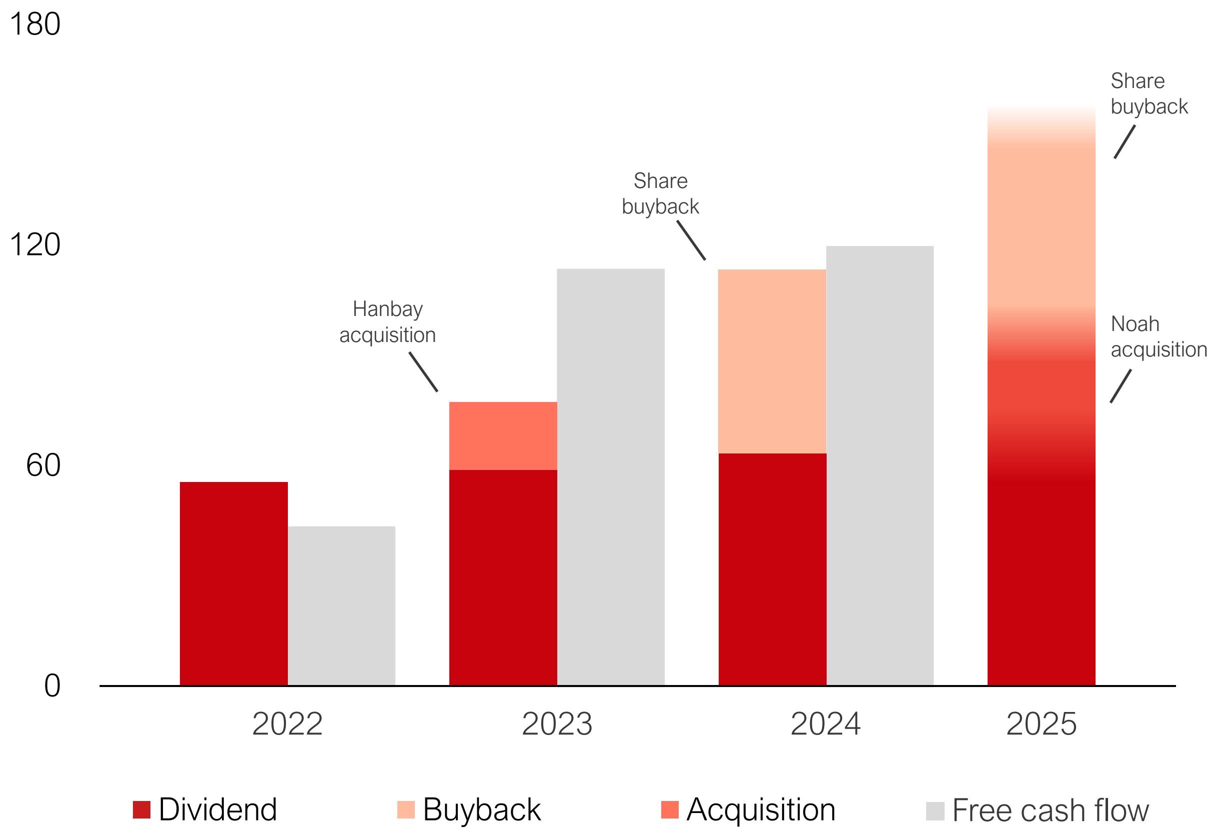


Asset light business operations

Free cash flow post investment supporting shareholder returns and strategic investments

Noah acquisition (£44m) and share buyback (£50m) already announced in 2025

Shareholder returns, M&A and free cash flow* (£m)



Our capital allocation priorities

- Organic investment
- Progressive dividend
- Strategic investments
- Return of cash

Underpinned by balance sheet strength

* Free cash flow is after organic investment and calculated as 'net cash flows from operating activities', plus 'net cash flows from investing activities' (excluding acquisitions/disposals of businesses), plus 'net cash flows from financing activities' (excluding dividends paid on ordinary shares and share buyback programme)

Financial review

Presented by
Ben Peacock - Chief Financial Officer

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Growth+ delivering strong sales growth and margin progress

Financial highlights – Group

	2024	2023	% change	% OCC[1]
Order intake	£744m	£724m	+2.8%	+6.1%
Revenue	£754m	£719m	+4.9%	+8.2%
Adjusted[2] operating profit	£178m	£164m	+8.5%	+12.8%
Adjusted[2] operating margin	23.6%	22.9%	+70bps	+100bps
Cash conversion	119%	120%	-	
Adjusted[2] EPS	15.9p	14.6p	+8.7%	
Full year dividend	7.75p	7.20p	+7.6%	

Key takeaways:

- Orders increased 6.1% OCC with all divisions ahead
- Sales grew high single digit OCC
- Rotork Service 23% of Group revenues
- Adj. operating margin +70bps higher at 23.6%
- Strong cash conversion
- ROCE 37.3%

Notes: 1. OCC results are excluding acquired businesses and restated at 2024 exchange rates (see slide 4 for more detail). 2. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items

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Strong growth driven by electrification and the downstream sector

Financial highlights – Oil & Gas

	2024	2023	% change	% OCC[1]
Revenue	£355.5m	£328.4m	+8.3%	+11.7%
Adjusted[2] operating profit	£92.0m	£83.6m	+10.0%	+13.6%
Adjusted[2] operating margin	25.9%	25.5%	+40bps	+50bps
Segment contribution				
Upstream %	24%	27%		
Midstream %	24%	24%		
Downstream %	52%	49%		

Double-digit year-on-year OCC revenue and adjusted operating profit growth

Key takeaways:

- Revenue 11.7% higher OCC driven by spend on increasing output, improving productivity and decarbonisation
- All regions grew, with EMEA and Asia Pacific particularly strong
- Strong downstream growth due to refinery and storage activity
- Adj. operating margin rose 40bps to a record 25.9% with higher sales partly offset by mix

Notes: 1. OCC results are excluding acquired businesses and restated at 2024 exchange rates (see slide 4 for more detail). 2. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items

Sales returned to growth in H2, lower in FY due to non-repeat of nickel projects

Financial highlights – Chemical, Process & Industrial

	2024	2023	% change	% OCC[1]
Revenue	£205.0m	£213.7m	(4.1)%	(1.1)%
Adjusted[2] operating profit	£53.0m	£51.3m	+3.4%	+7.4%
Adjusted[2] operating margin	25.8%	24.0%	+180bps	+210bps

Fundamentals attractive: 3-year OCC revenue CAGR of 8.8%

Key takeaways:

- Revenue 1.1% lower OCC largely due to reduced mining activity
- Sales growth resumed in the second half
- India, Middle East and Latin America continue to be growth drivers for the division
- Solid growth in Target Segments speciality chemicals and critical HVAC
- Adj. operating margin benefited from mix as well as disciplined cost management

Notes: 1. OCC results are excluding acquired businesses and restated at 2024 exchange rates (see slide 4 for more detail). 2. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items

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Global infrastructure spend driving strong growth in both sectors

Financial highlights – Water & Power

	2024	2023	% change	% OCC[1]
Revenue	£193.9m	£177.0m	+9.5%	+13.1%
Adjusted[2] operating profit	£56.4m	£46.4m	+21.3%	+25.8%
Adjusted[2] operating margin	29.1%	26.2%	+290bps	+300bps

Double-digit year-on-year OCC revenue and adjusted operating profit growth

Key takeaways:

- Sales grew double digits OCC with water sector growing slightly faster than power
- All regions delivered double digits growth OCC
- Target Segments of desalination and water infrastructure grew strongly
- Adjusted operating margin +290bps

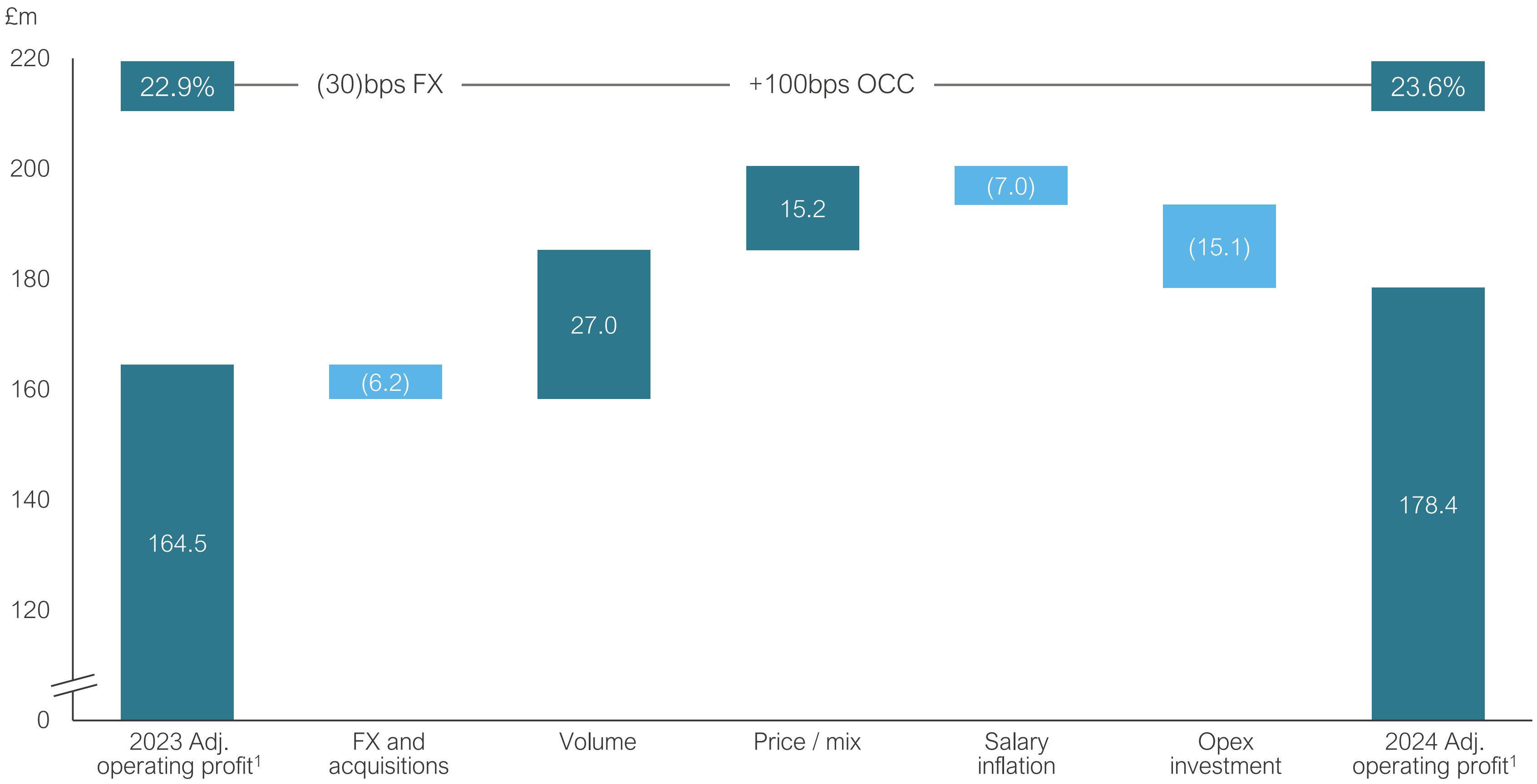
Notes: 1. OCC results are excluding acquired businesses and restated at 2024 exchange rates (see slide 4 for more detail). 2. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items

Strong profit growth driven by increased revenues and positive operating leverage

Adjusted[1] operating profit bridge

Key takeaways:

- Price / mix largely reflects price increases which are back to normal levels
- Investment / overhead costs are a mix of salary inflation, higher variable compensation and additions to support Growth+
- Adj. operating margin +70bps higher at 23.6%



Notes: 1. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items

De-risking UK pension, re-engineering our business systems

Items below adjusted[1] operating profit

Key takeaways:

- Bulk annuity purchased to de-risk UK defined benefit pension scheme. £18m is one-time and non-cash
- Investment in Business Transformation continues
- Other costs largely relate to new China facility
- Effective tax rates expected to rise by up to 50bps in 2025

Adjustments to operating profit (£m)	2024	2023
Defined benefit scheme settlement	(18.0)	-
Business Transformation investment	(17.2)	(13.1)
Amortisation of acquired intangibles	(2.6)	(2.1)
Other costs	(4.7)	(1.2)
Gain on property disposal	-	0.7
Total adjusting items	(42.5)	(15.7)
Tax credit on adjusting items	10.5	3.6
Total adjusting items (post-tax)	(32.0)	(12.1)

Tax		
Reported effective tax rate	25.4%	24.7%
Adjusted effective tax rate	25.2%	24.5%

Notes: 1. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items

Solid cash flow funding growth and organic investment

Summary cash flow

Key takeaways:

- Adjusted operating cash flow reflects strong cash conversion underpinned by a 220bps reduction in working capital
- Higher capex driven by new facility in China
- Reduced pension following £20m special contribution in 2023
- Other items includes Business Transformation investment
- Free cash flow includes R&D cash spend of £13.4m (2023: £13.9m)

£m	2024	2023
Net working capital	189.0	196.2
Debtor days	*56*	*55*
Inventory turns	*3.2x*	*3.1x*
Net working capital as % of sales	*25.1%*	*27.3%*
Cash conversion	*119%*	*120%*
Cash generated from operations	212.7	197.8
Net capex and repayment of lease liabilities	(23.9)	(13.6)
Net own ordinary shares acquired	(9.5)	(1.4)
Net interest	2.2	3.0
Income taxes	(38.8)	(32.8)
Additional pension contributions paid	(4.1)	(26.5)
Other including business transformation costs	(18.6)	(12.7)
Free cash flow[1]	120.0	113.8

Note: 1. Free cash flow is after organic investment and calculated as 'net cash flows from operating activities', plus 'net cash flows from investing activities' (excluding acquisitions/disposals of businesses), plus 'net cash flows from financing activities' (excluding dividends paid on ordinary shares and share buyback programme)

Free cash flow funding returns to shareholders

Capital allocation and liquidity

Key takeaways:

- £113m returned to shareholders via dividends and share buyback
- Finished the year with a net cash position of £125m
- Liquidity strengthened by £75m Revolving Credit Facility
- Clear capital allocation policy unchanged
- Further £50m share buyback in 2025 announced; and £44m acquisition of Noah
- Strong balance sheet provides strategic flexibility

£m	2024	2023
Free cash flow[1]	120.0	113.8
Dividends	(63.3)	(58.8)
Share buyback	(50.3)	-
Acquisitions	-	(18.4)
Net cash flow	6.4	36.6

£m	2024	2023
Net cash at 1 January	134.4	105.9
Net cash flow	6.4	36.6
Net movement in lease liabilities	(12.7)	(3.1)
FX and other non-cash items	(2.8)	(5.0)
Net cash at 31 December	125.3	134.4

Notes: 1. Free cash flow is after organic investment and calculated as 'net cash flows from operating activities', plus 'net cash flows from investing activities' (excluding acquisitions/disposals of businesses), plus 'net cash flows from financing activities' (excluding dividends paid on ordinary shares and share buyback programme)

Strong progress with good sales growth and margin improvement

Guidance and financial summary

2025 guidance

- Currency impact currently a 1-2% headwind to sales
- Capex c. £15m
- Business transformation investment c. £30m

Summary

- The outlook for our end markets remains positive
- Encouraging order intake in January and February
- Anticipate 2025 to be a year of progress (OCC[1])

Notes: 1. OCC results are excluding acquired businesses and restated at the current year exchange rates (see slide 4 for more detail).

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Noah acquisition, Growth+ update and outlook

Presented by
Kiet Huynh - Chief Executive Officer

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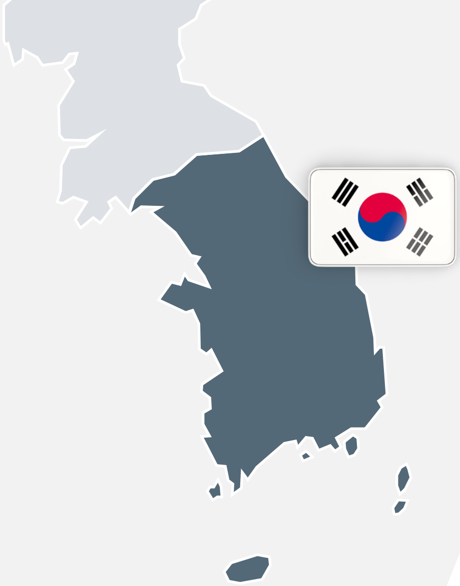
Noah Actuation enhancing Rotork's portfolio
Complementary bolt-on acquisition

Bolt-on acquisition of Noah Actuation

- A leading South Korean electric actuator manufacturer
- Headquartered in Seoul, South Korea
- Relationship established over five years
- Estimated 2025 sales and adj. EBITDA of £17.5m and £3.5m

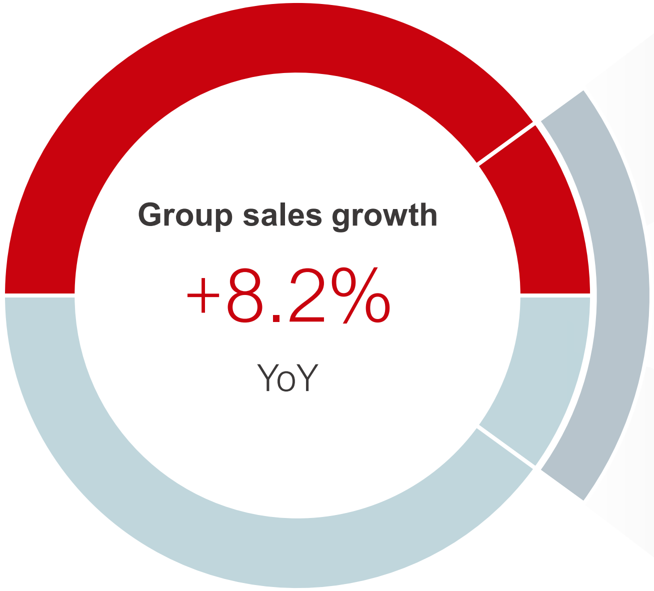


Strategic rationale

- Consistent with Rotork's Growth+ strategy
- Aligns with Target Segments in Water & Power, CPI and Oil & Gas (upstream electrification)
- Complementary to our electric actuator product range
- Asset light assembly & test business model mirrors Rotork
- Potential for significant sales synergies in the medium term

Target Segments and Rotork Service driving our sales growth

Significant high return opportunities in large markets



Target Segments: +9% YoY

- Future market leader
- Large addressable market
- Quality product range
- Mega trend tailwinds

Rotork Service

- Large installed base
- Resilient revenue stream

Core Segments: +8% YoY

- Clear market leader
- Large installed base
- Mega trend tailwinds
- Aftermarket opportunity

High return structural growth above markets driven by Target Segments and Rotork Service

Notes: All revenue growth rates are OCC, sales growth rates for Target and Core Segments are management estimates, pie charts show contribution of segments to Group revenue and Rotork Service to segments (management estimates)

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Data centre cooling a major opportunity for Critical HVAC

Automation trends provide growth opportunities for electric actuation

- The data centre cooling market is forecast to grow rapidly on the back of increasing data processing intensity
  - Outside server room opportunities - the average data centre today has around 1,000 valves located between the coolers and the server room
  - Major opportunity converting from manual (~95%) to automated (~5%) valve operation
  - Rotork's product offering enhanced with the acquisition of Noah

Electric actuators for cooling towers, chillers and pipelines

Compact spring return electric actuators from Noah expand product portfolio

Chainwheels for outside server room pipelines

Critical HVAC represents around 15% of CPI sales

The data centre cooling market is estimated to grow by c.17% CAGR over the next 5 years[1]

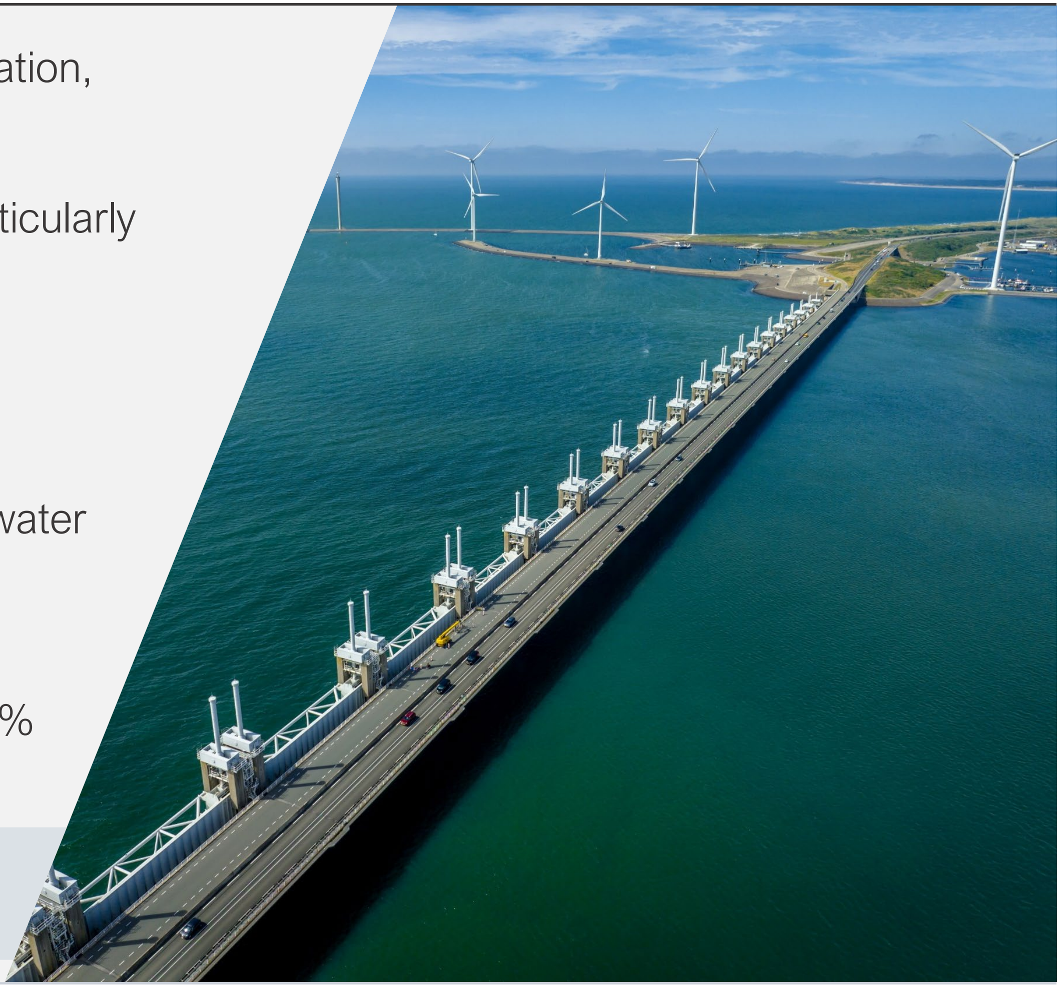
Notes: 1. Grand View Research

Enabling clean water access and climate change resilience

Water infrastructure, water & wastewater treatment and desalination

- Global water markets have significant growth potential driven by automation, urbanisation and the need to upgrade ageing infrastructure
- Accelerating investment in water & wastewater systems worldwide, particularly in the US, UK, China, India and the Middle East
- Increased demand for advanced treatment processes driven by stricter regulations and tighter compliance requirements
- Growth in power demand driving water demand (the so-called energy-water nexus, e.g. power plants require cooling, desalination needs energy)
- Rotork's earlier sales force realignment, recent product launches and service capabilities have contributed to a 3-year sales CAGR of 13%

W&P well positioned to capitalise on global water investment



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Rotork Service offers significant potential for profitable growth
23% of Group revenue, growing faster than the Group

- Rebranded Rotork Service offering comprehensive lifecycle support
- Leveraging our mobile app and iAM to drive operational efficiency, safety and reliability for our end users
- Delivering cyclically resilient revenue from a large installed base

One Product Sale

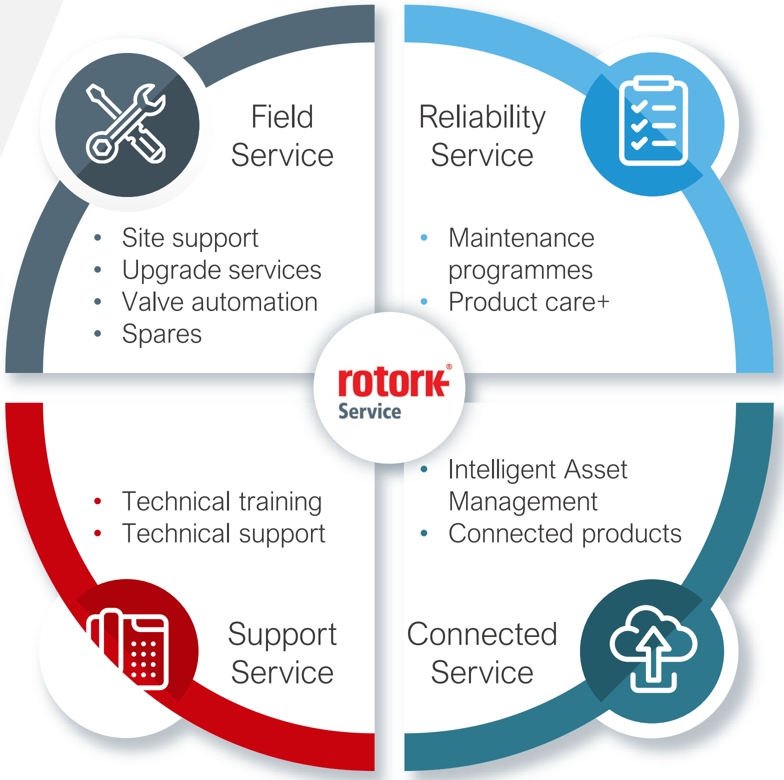
1x
Original Equipment Sale

2x
Support & Field Service

2x
Reliability & Connected Service

Typical product lifecycle is 15 – 20 years

Rotork Service can generate 4x value over a product's life



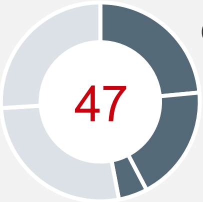
The outlook for our end markets remains positive

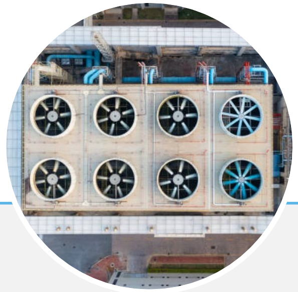
Market outlook

Oil & Gas

- Downstream market to remain buoyant
- Upstream and midstream electrification trend continues
- Gas and LNG represent close to half of divisional sales

Revenue %

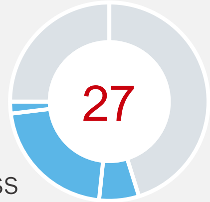


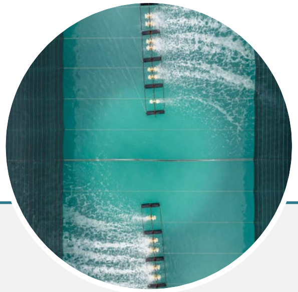


Chemical, Process & Industrial

- Structural growth in critical HVAC
- Positive outlook for specialty chemicals, mining and marine
- Winning share in target segments and markets where Rotork has been historically under-represented

Revenue %

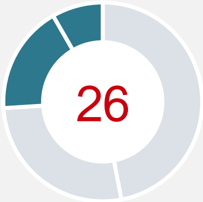




Water & Power

- Growth expected in water and wastewater markets in all key geographic regions
- Positive outlook for power markets

Revenue %



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Growth+ delivering our vision

1 Mid to high single-digit revenue growth	+8.2% YoY 3-year OCC[1] revenue CAGR of +10.0%
2 Mid 20s adjusted[2] operating profit margin	23.6% +70bps YoY 3-year adjusted[2] operating margin increase of 110bps
3 Strong cash conversion and high ROCE	119% Cash conversion | 37.3% ROCE
4 Progressive dividend policy, share buybacks	20+ years Annual dividend growth | 2021, 2024, 2025 Share buybacks of £50m
5 Bolt-on M&A aligned with our target segments	HANBAY INC. A rotork Brand | NOAH Actuation

Notes: 1. OCC results are excluding acquired businesses and restated at 2024 exchange rates (see slide 4 for more detail). 2. Adjusted figures exclude the amortisation of required intangible assets and other adjusting items

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Appendices

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Revenue and adjusted operating margins[2]

Revenue (£m)	2024	2023	% change	% OCC[1]
Oil & Gas	355.5	328.4	+8.3%	+11.7%
Chemical, Process & Industrial	205.0	213.7	(4.1)%	(1.1)%
Water & Power	193.9	177.0	+9.5%	+13.1%
Group	754.4	719.1	+4.9%	+8.2%

Adjusted[2] operating margin	2024	2023	% change	% OCC[1]
Oil & Gas	25.9%	25.5%	+40bps	+50bps
Chemical, Process & Industrial	25.8%	24.0%	+180bps	+210bps
Water & Power	29.1%	26.2%	+290bps	+300bps
Group	23.6%	22.9%	+70bps	+100bps

Notes: 1. OCC results are excluding acquired businesses and restated at 2024 exchange rates (see slide 4 for more detail). 2. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items

Geography revenues

Key takeaways:

- EMEA sales growth was driven by all three divisions
- APAC growth in Oil & Gas and Water & Power was offset by CPI
- Americas sales driven by Water & Power

Revenue (£m)	2024	2023	% change	% OCC[1]
EMEA	288.5	260.8	+10.6%	+13.4%
APAC	255.3	257.5	(0.9)%	+3.0%
Americas	210.6	200.8	+4.9%	+8.1%
Group	754.4	719.1	+4.9%	+8.2%

Notes: 1. OCC results are excluding acquired businesses and restated at 2024 exchange rates (see slide 4 for more detail).

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Analysis of movements

£m		2023	Foreign exchange	OCC[1]	Acquisitions	2024
Order intake		723.7	(24.1)	42.4	2.3	744.3
				+6.1%		+2.8%
Revenue		719.1	(24.1)	57.2	2.2	754.4
				+8.2%		+4.9%
Adjusted[2] operating profit		164.5	(7.1)	20.1	0.9	178.4
				+12.8%		+8.5%
Adjusted[2] operating margin		22.9%				23.6%
			(30)bps	+100bps	-	+70bps

- Revenue split 34% US$, 22% Euro, 11% GBP and 33% other currencies
- Adjustments relate to intangible amortisation of £2.6m (2023: £2.1m), defined benefit settlement scheme loss of £18.0m (2023: £nil) and other adjusting items £21.9m (2023: £13.6m)

Notes: 1. OCC results are excluding acquired businesses and restated at 2024 exchange rates (see slide 4 for more detail). 2. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items

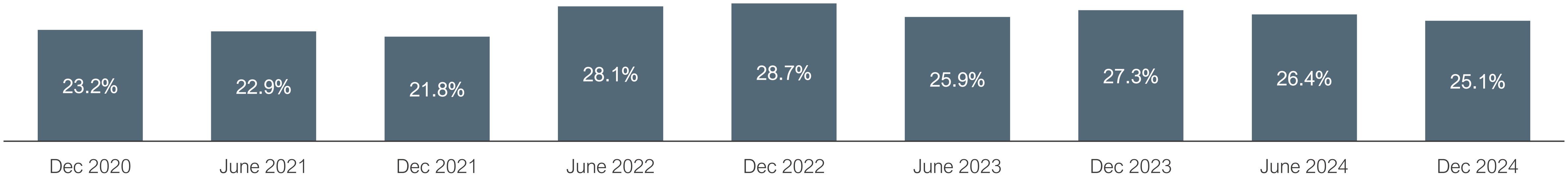
Earnings per share

	2024	2023	% change
Profit before tax as reported	£140.5m	£150.6m	(6.8)%
Adjusted[1] Profit before tax	£183.0m	£166.3m	+10.0%
Effective tax rate	25.4%	24.7%	+70bps
Adjusted[1] effective tax rate	25.2%	24.5%	+70bps
Basic EPS as reported	12.1p	13.2p	(8.1)%
Adjusted[1] basic EPS	15.9p	14.6p	+8.7%

Notes: 1. Adjusted figures exclude the amortisation of acquired intangible assets and other adjusting items

Working capital

	Dec 2024	% Revenue	Dec 2023	% Revenue
Inventory	£83.4m	11.0% (turns 3.2x)	£84.0m	11.7% (turns 3.1x)
Trade Receivables	£149.5m	19.8% (56 D.S.O.)	£152.8m	21.3% (55 D.S.O.)
Trade Payables	£(43.8)m	5.8%	£(40.6)m	5.6%
Net working capital	£189.0m	25.1%	£196.2m	27.3%



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Exchange rates

		USD	Euro
Average rates	H1 2023	1.23	1.14
	FY 2023	1.24	1.15
	H1 2024	1.27	1.17
	FY 2024	1.28	1.18
	+ = GBP strengthening / - = GBP weakening		
	H1 2024 v H1 2023	+2.9%	+2.6%
	FY 2024 v FY 2023	+2.7%	+2.7%
Period-end rates	December 2023	1.27	1.15
	June 2024	1.26	1.18
	December 2024	1.25	1.21
	+ = GBP strengthening / - = GBP weakening		
	December 2024 v December 2023	(1.7)%	+4.8%

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Dividends

Key takeaways:

- 2024 full year dividend increased 7.6% to 7.75p (2023: 7.20p)

Core dividend	Monthly paid / payable	Amount	Cost
2022 final	May 2023	4.30p	£36.9m
2023 interim	September 2023	2.55p	£21.9m
Paid in 2023		6.85p	£58.8m
2023 final	May 2024	4.65p	£39.9m
2024 interim	September 2024	2.75p	£23.4m
Paid in 2024		7.40p	£63.3m
2024 final – proposed	June 2025	5.00p	£42.1m*

Notes: * Management estimates

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