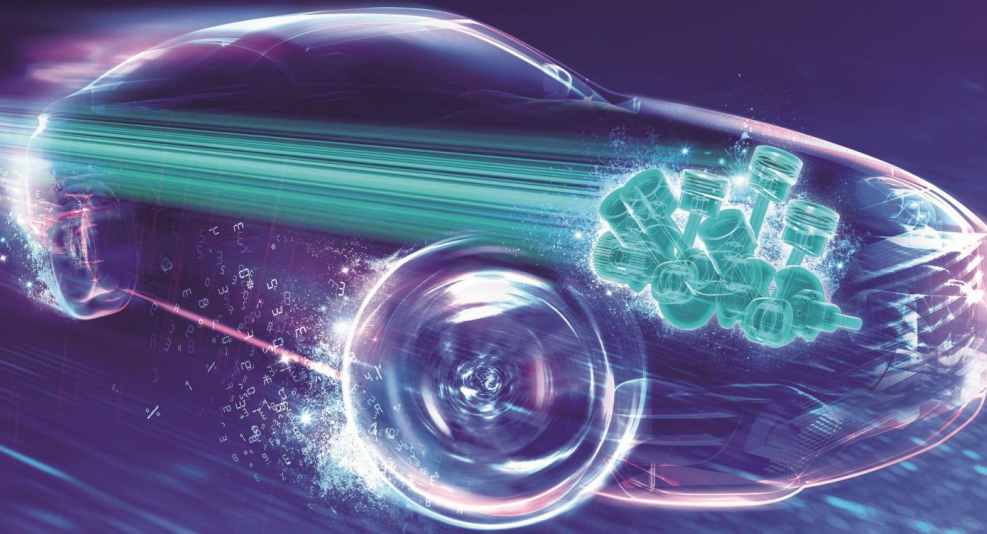


39th Annual General Meeting PETRONAS DAGANGAN BERHAD

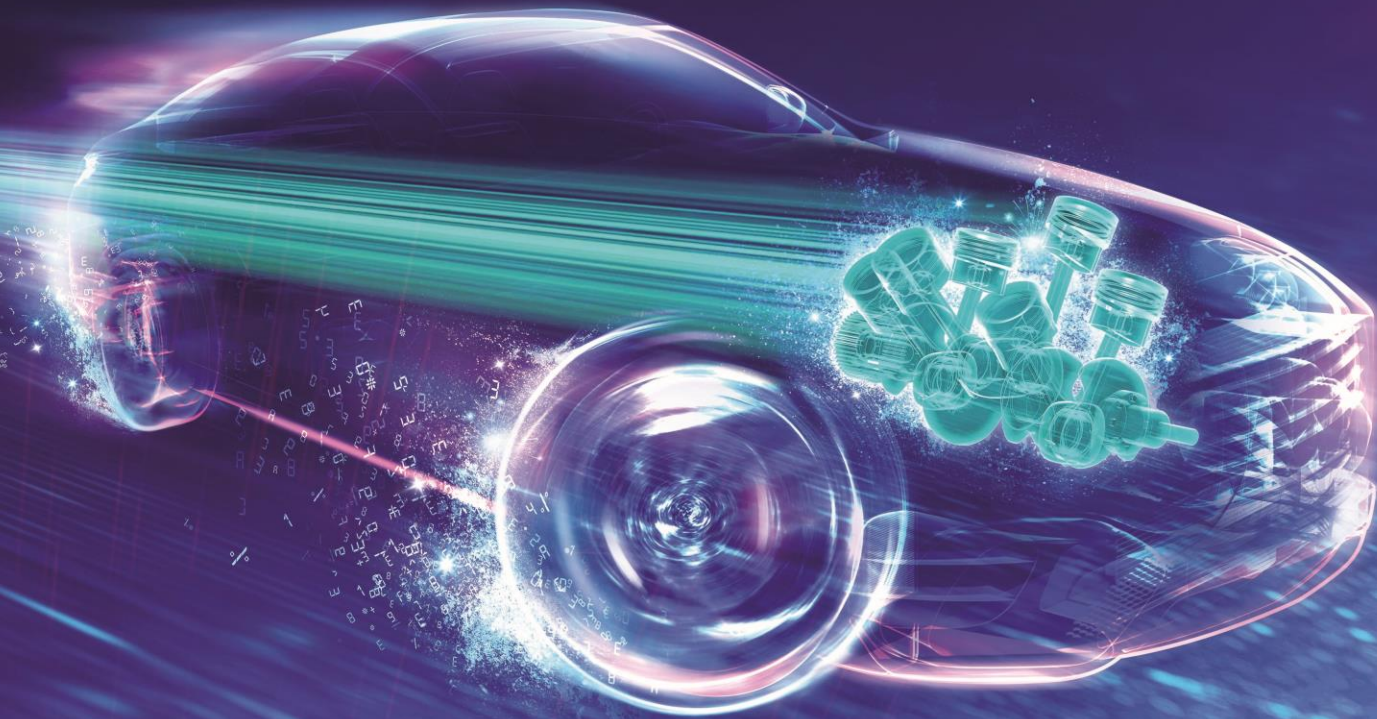


PETRONAS

FUTURE PROOF

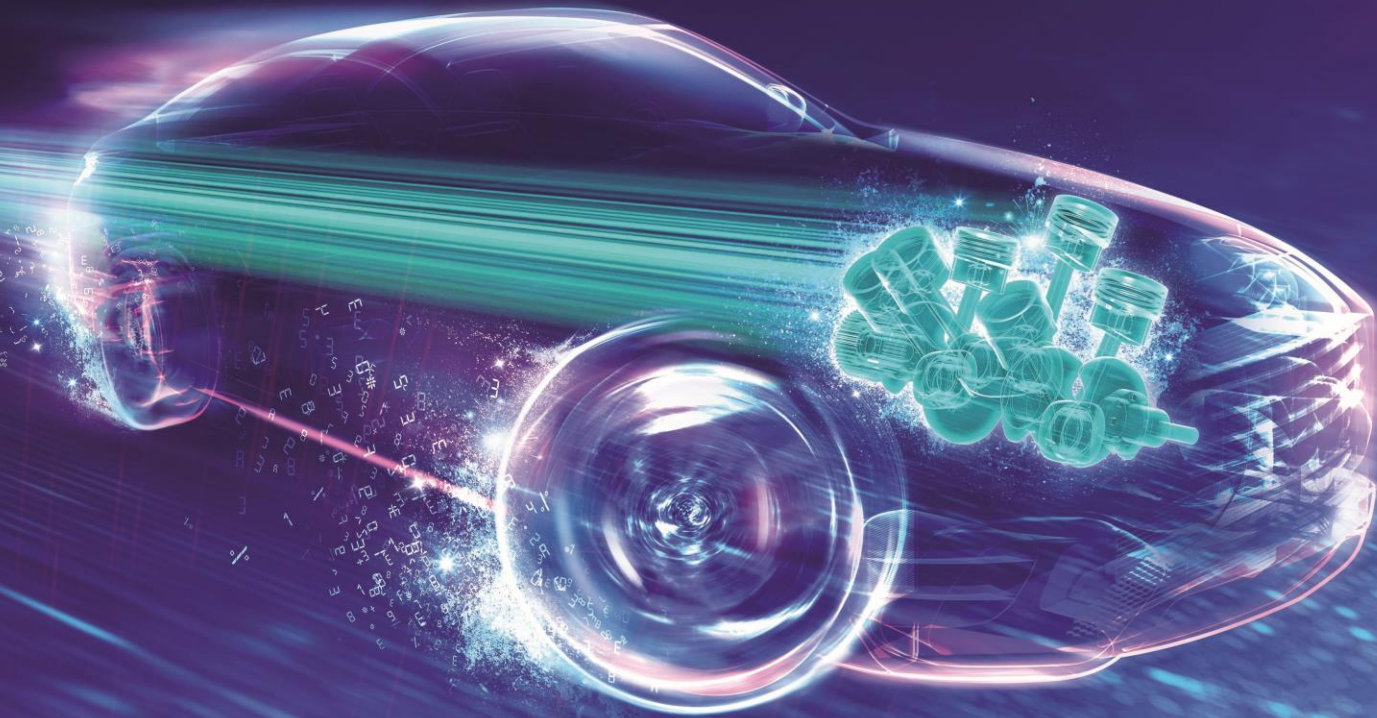


FUTURE PROOF



- ① **Operating Environment**
- ① **FY2020 Performance**
- ① ***"Future-Proof"***
- ① **Sustainability Commitment**
- ① **Awards and Recognitions**
- ① **Moving Forward**

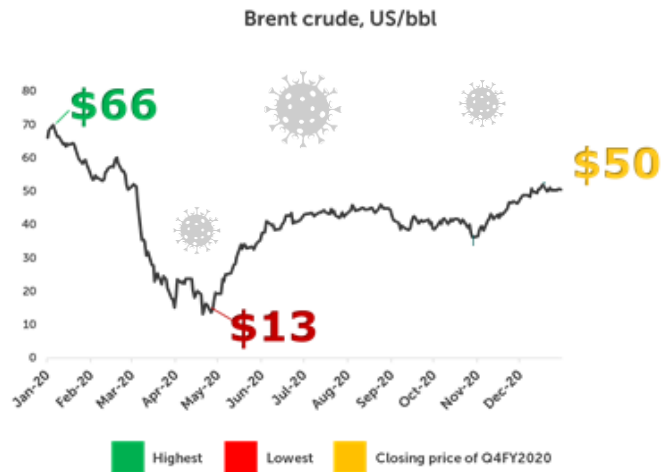
FUTURE PROOF



- ① **Operating Environment**
- ② **FY2020 Performance**
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- ⑤ **Awards and Recognitions**
- ⑥ **Moving Forward**

Unprecedented 2020 due to COVID-19

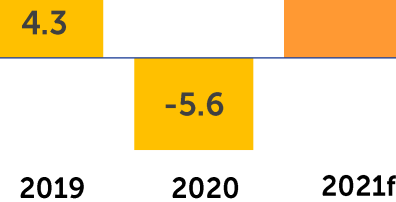
Energy Price Volatility



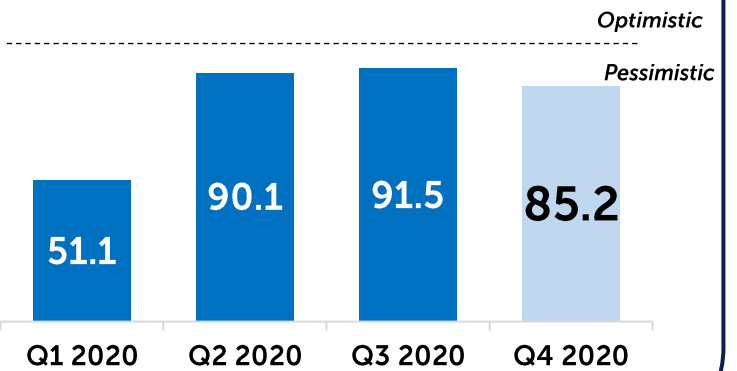
source: Platts

Weak economy

GDP
(%) Change Y-o-Y



Consumer Sentiment Index



Source: Bank Negara, MIER

Accelerated Digitalisation

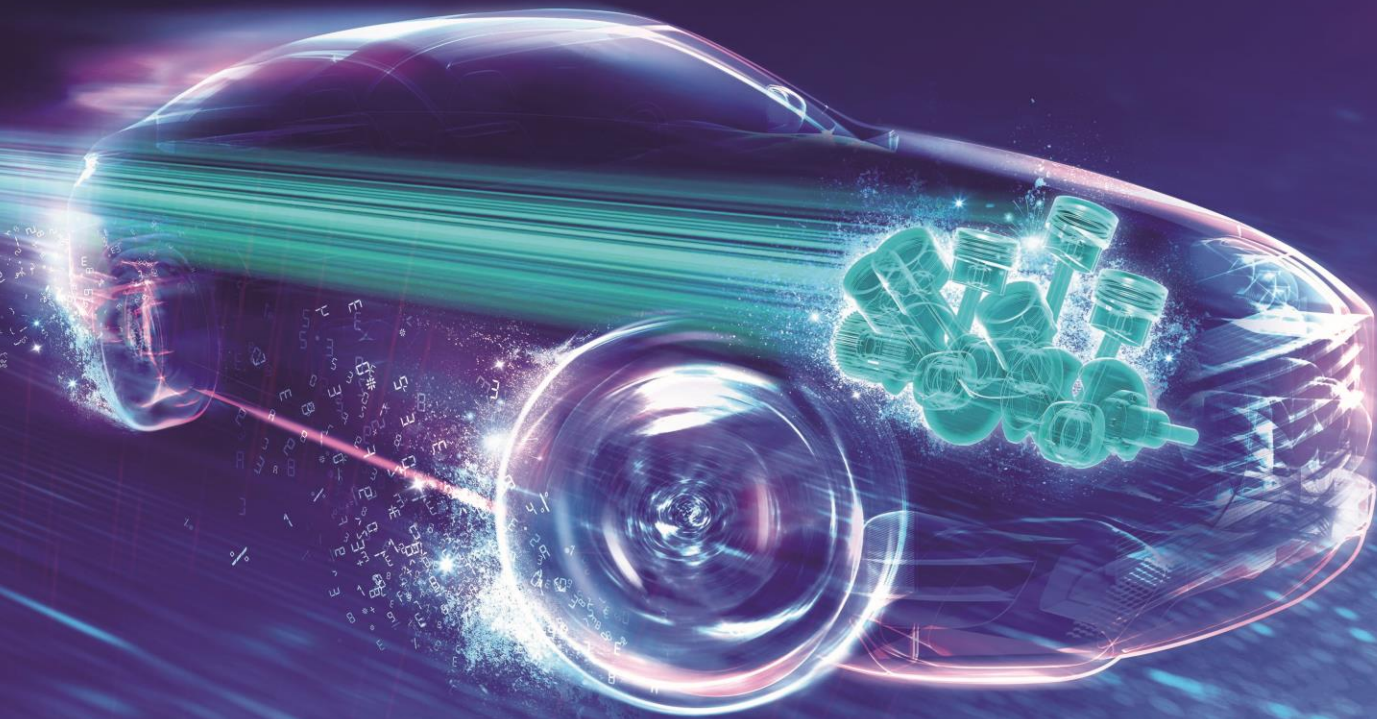
- Surge in digital adoption
- E-commerce boom
- Demand for contactless transactions

Source: Bain & Co

Shift in socio-economy focus

- Support for local businesses and products
- #LoveLocal campaign

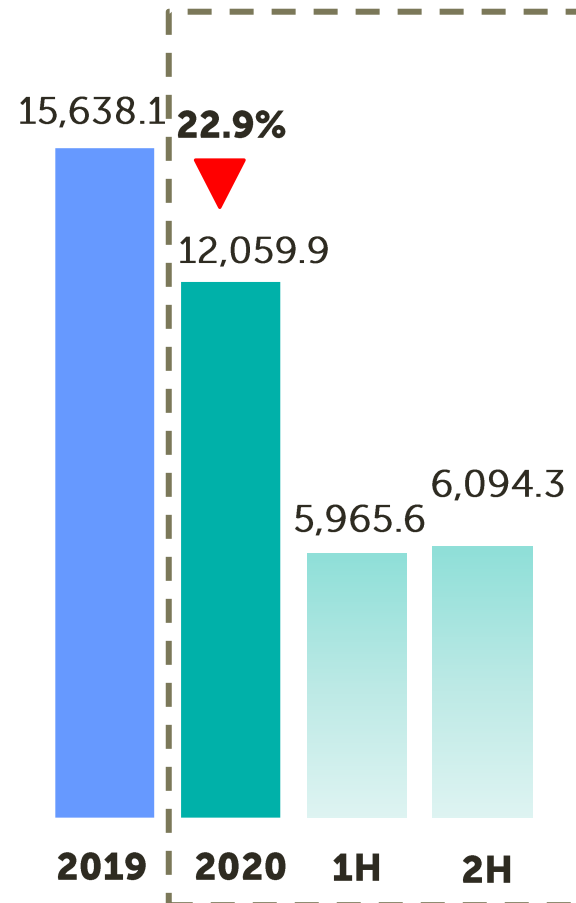
FUTURE PROOF



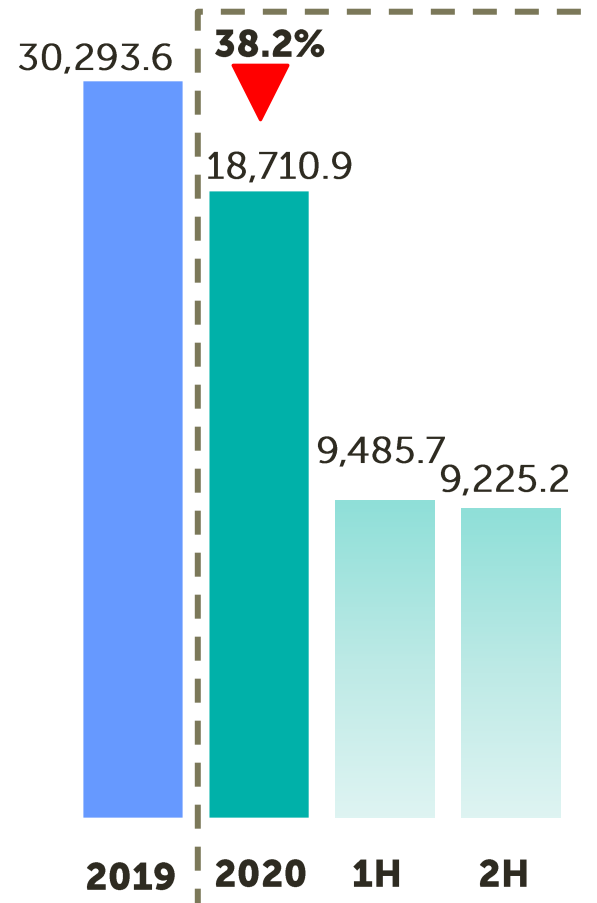
- ① **Operating Environment**
- ② **FY2020 Performance**
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- ⑥ **Moving Forward**

Softer performance against FY2019 with gradual recovery in 2H FY2020

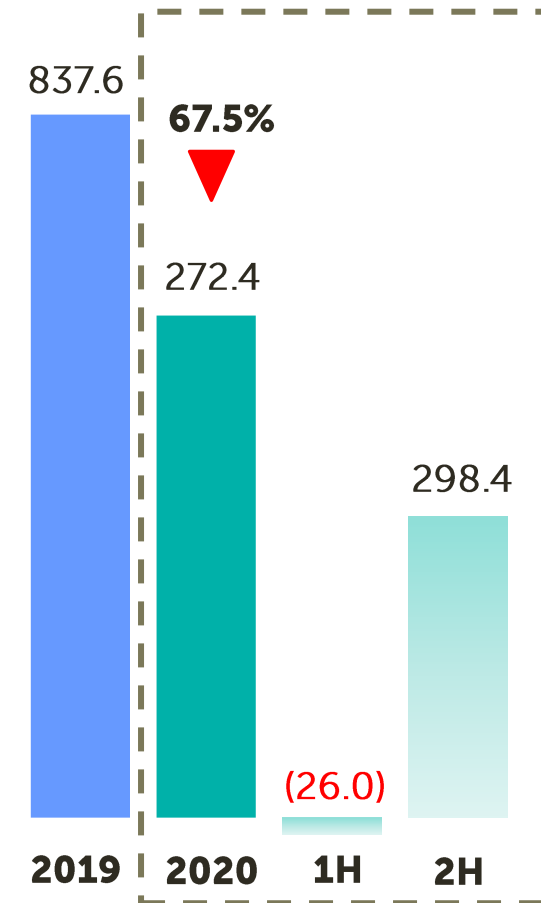
Volume (Mil Litres)



Revenue (RM Mil)



Profit After Tax (RM Mil)



Sustained healthy financial position and return to shareholders



Total Assets

RM8,359.6 mil

FY2019: RM 9,996.3 mil

Cash

RM2,691.8 mil

FY2019: RM 3,425.5 mil

Dividend Paid

RM606.0 mil

FY2019: RM 695.4 mil

Dividend Payout

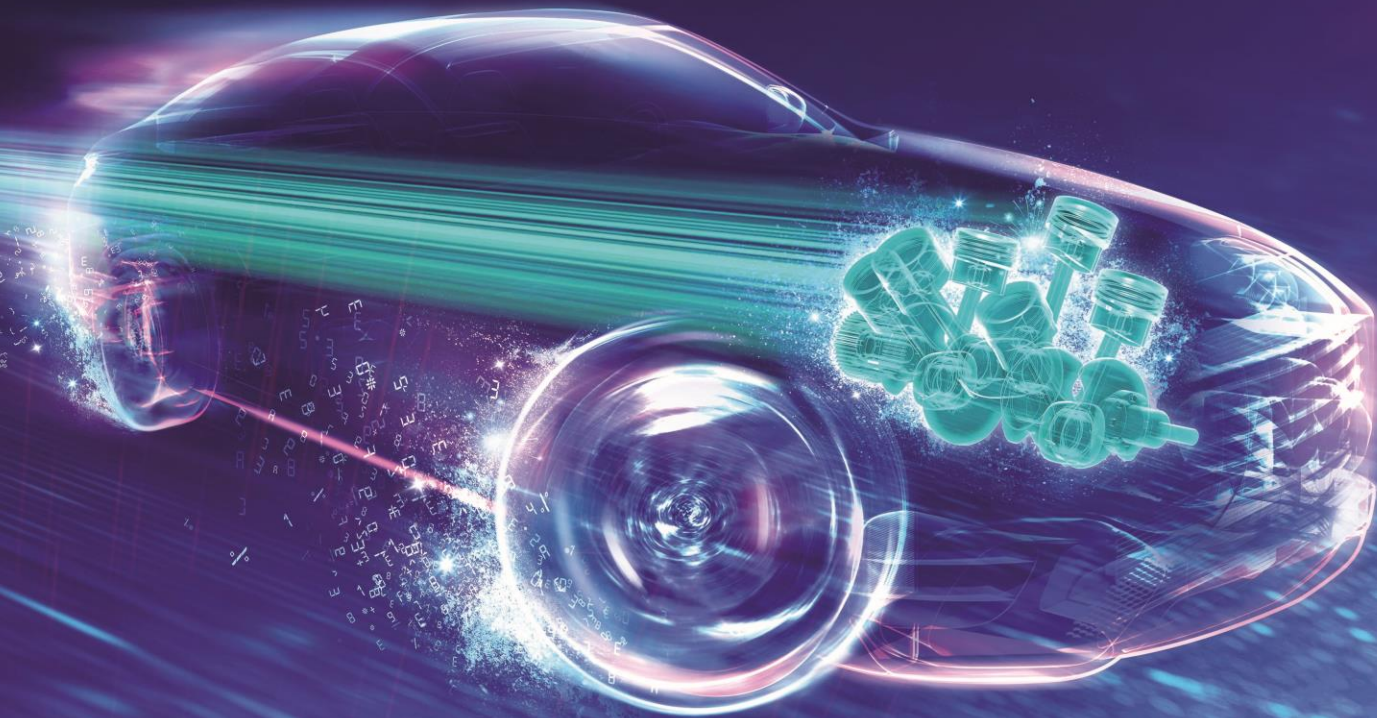
38.0 sen

FY2019: 85.0 Sen

96%

FY2019: 104%

FUTURE PROOF



- ① Operating Environment
- ① FY2020 Performance
- ② ***“Future-Proof”***
- ① Sustainability Commitment
- ① Awards and Recognitions
- ① Moving Forward

Exploring opportunities beyond traditional business



**FUTURE
PROOF**

Accelerate growth by expanding into new business ventures that leverage on PDB's assets and existing ecosystem



PETRONAS

PETRONAS



Market Leadership
RETAIL BUSINESS



Strengthening our brand presence and consistently deliver superior customer experiences



Launched new

PETRONAS Primax 97 with Pro-Race

Operationalised **14** new stations in 2020

Launched ready-to-eat meals and other food offers under new **Makan@Mesra** concept

>100 Tealive X PETRONAS kiosks in operation

Digitalised **Mesra Redemption Portal** for mobile app and web

Our new best fuel, with two-thirds of drivers experiencing more power, responsiveness and efficiency



Available at
>700 PETRONAS Stations



Power

Removes **99.9%** engine deposits from key areas for effortless power



Responsive

Formulated with the World's first Advance Dual Friction Modifier that reduces friction by an additional **25%** for a more responsive drive



Efficient

Unique formulation for better fuel and oil interaction to take you further, resulting in more **fuel efficiency** and **lower carbon emissions**

Operationalised **14** new stations at strategic locations



Some of operationalised PETRONAS station pictures in 2020

Johor



PS Jalan Pandan (June 2020)

Perlis



PS Jejawi (May 2020)

Sarawak



PS Lachau (Oct 2020)

Rolled-out new *Kedai Mesra* concept and introduced *Makan@Mesra*

New *Kedai Mesra* concept stores and *Makan@Mesra*

New partners





Market Leadership
COMMERCIAL BUSINESS

Effective execution of recovery and rebound strategies



Drove sales recovery post COVID-19 lockdown to **sustain B2B market leadership**



Secured and **renewed >200** contracts which strengthened customer base



Effectively **mitigate credit risk exposure** during the uncertain and challenging period



**Market Leadership
LPG BUSINESS**

LPG Business remained resilient whilst driving growth in all segments

Fortified market position

Sales channel expansion through **LPG@PS** at
>100 PETRONAS Stations

New sales channel through **LPG@Sundry Shop**
carrying exclusively Gas PETRONAS at **5** pilot outlets

Secured **>40 new** commercial customers



Uranila



**Market Leadership
LUBRICANT BUSINESS**

PERSONAS
AUTO Expert



Delivering value through differentiation and relevance



Shop @  Shopee



Strengthen Market Position

in the B2C and B2B segment

Brand Strengthen

Double digit growth on all key brand measures

Great response to our e-commerce entry

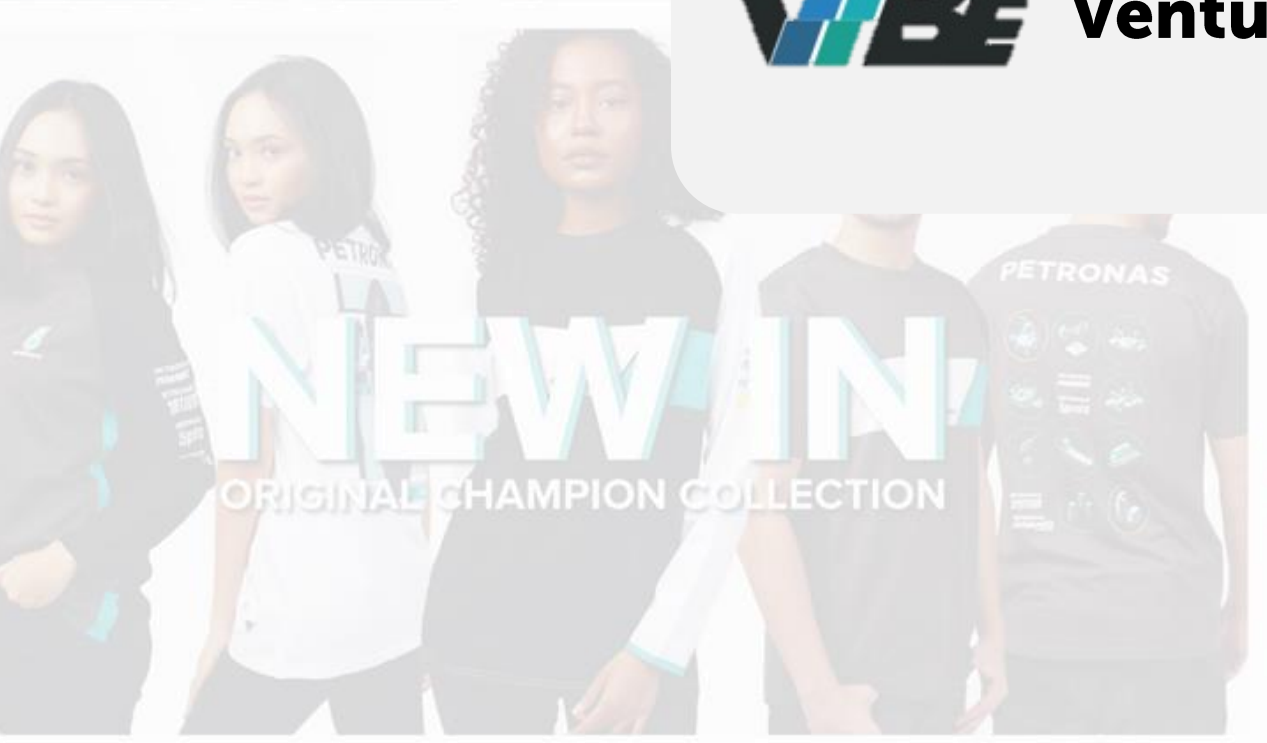
2x quarter-on-quarter sales growth since inception

PETRONAS AutoExpert Growth

Customer retention rate increased from **12.5%** (2019) to **45%** (2020)



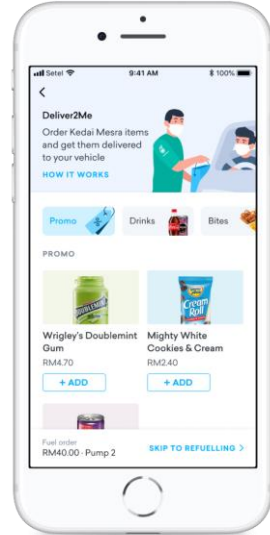
VIBE² Venture Builder



Setel is now available in nationwide PETRONAS stations



C-Store payments



Deliver2Me
145 stations in Klang Valley



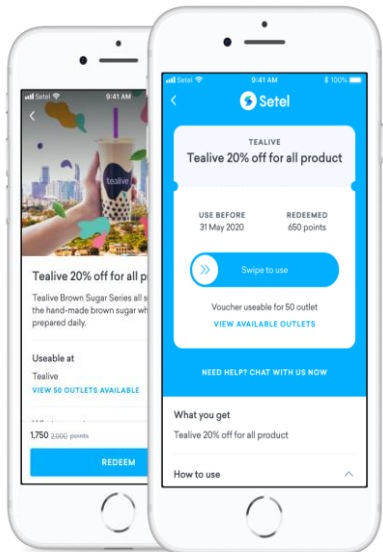
★ 4.4



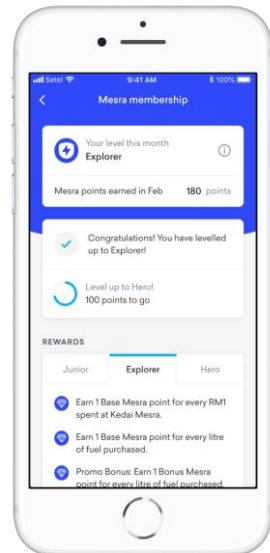
★ 4.8

Over 58%

Repeat purchase rates



Mesra deal redemption



Mesra membership tiers

*Enjoy **3x** Mesra points and up to **10x** Mesra points for new members*

22+ Mil Litres

Total Purchases
10x growth from early 2020

1+ billion

Mesra points redeemed

Leveraging on assets and existing ecosystem to drive growth in new businesses



>**30** ROVR business customers



First ever **LNG bunkering** in Southeast Asia

Malaysia's first LNG solutions provider **using trucks for off-grid customers** via **Virtual Pipeline System**



Expanding merchandise business delivering **~RM8 million** motorsport apparel via online sales

Sold **~200K items** over **66 SKUs**

Hot selling items in 2021 are the F1 7th times World Champion merchandise range and face masks.



**Safe, Reliable and
Efficient**



Dedicated to ensuring safe, timely and reliable operations despite the global pandemic challenges

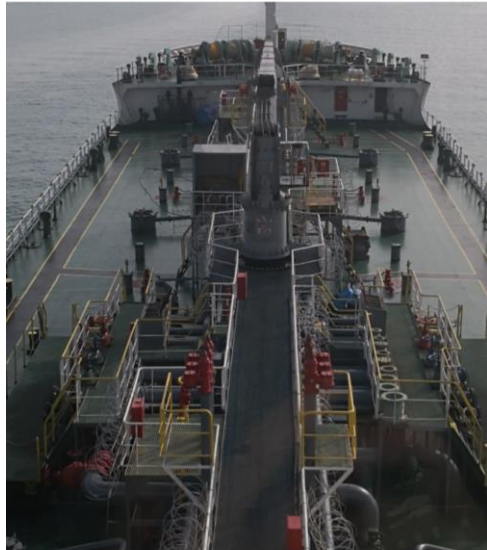


Best overall HSE performance the in last **10** years

Sustain the reliability and availability of Product at all times with Low Inventory level and high Time Charter Utilisation at **89%**

Continuous Improvement to achieve the highest **On Time In Full (OTIF)** product delivery to customer

Awarded **8 Gold Merit** and **5 Gold awards** by the Malaysia Society For Occupational Safety & Health





Great Place to Work

Talent priorities for today's business and future growth

Leaders Speak



MAKING THE IMPOSSIBLE POSSIBLE
#seamless #frictionless

Azrul Osman Rani
MD/CEO

Click [HERE](#) to know more



OBJECTIVES OF CITIZEN ANALYTICS



**GOWOMEN:
WORK LIFE BALANCE**

Work life balance doesn't mean that I get to spend the right amount of time each day between being the best employee, a good wife, an excellent mom, a perfect daughter or daughter in law. I could never achieve that. But in the course of a week or a month if I can strive that balance, that's an achievement for me. So you find your rhythm and always remember "success isn't about working hard, it's all about working smart".

Pramela A/P Vallinayagan
Head (LPG Business)
PETRONAS Dagangan Berhad

#GoWomen
#empoweringwomentogether



Niche skills for growth engines

Digital capabilities and
innovation culture

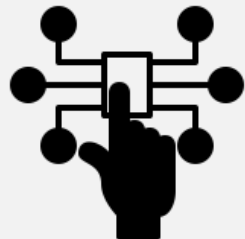
Support PETRONAS
Diversity & Inclusivity aspiration

Digital
Blueprint

Operational
Excellence

Cyber
Security

ation



Digitally enabled

Drive change in PDB and create digital solutions for our customers

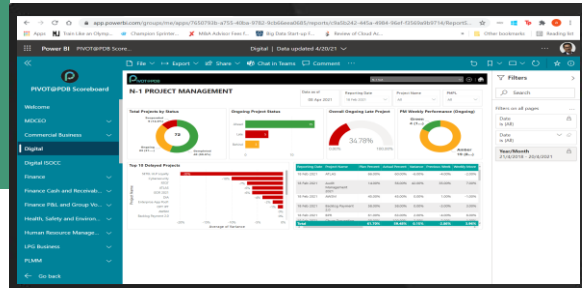


Upgraded Outdoor Payment Terminals with **world's first 15" interactive touch screen** to better serve our customers' needs

Installed state-of-the-art **Cloud-based** Point of Sale system to **>500** PETRONAS stations, the **first in the region** for fuel retail

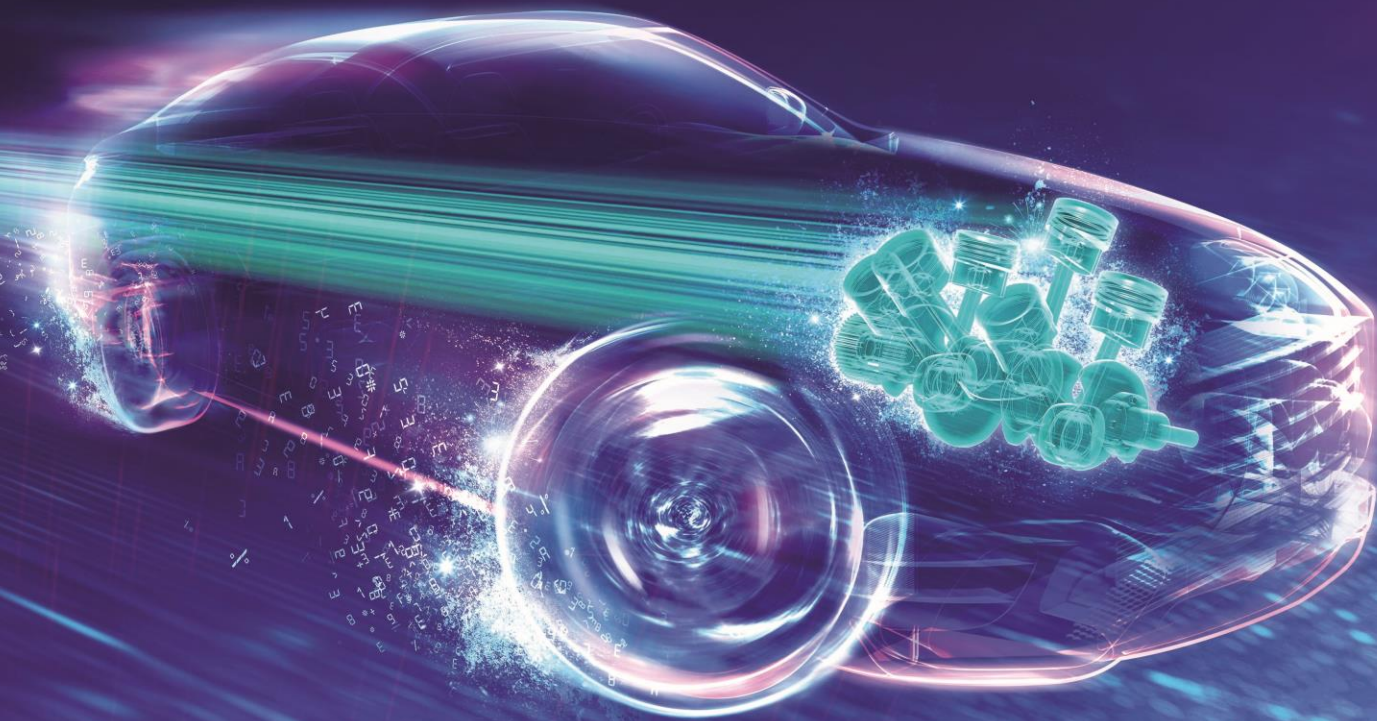


Established large scale data platforms to propel **data driven decision** and **analytic capability**



Heightened **Cyber Security Controls** and processes

FUTURE PROOF



- ① **Operating Environment**
- ① **FY2020 Performance**
- ① ***“Future-Proof”***
- ② **Sustainability Commitment**
- ① **Awards and Recognitions**
- ① **Moving Forward**

Positive economic impact through mutual growth with communities and stakeholders



Economy

Develop and promote the capabilities of **local SME**

Buy Local campaign created greater awareness to support and buy local products to stimulate domestic consumption.



Mari Bersama Sokong Produk Lokal Kebanggaan Kita

MARI BERSAMA SOKONG
PRODUK LOKAL KEBANGGAAN KITA

Berbelanjalah untuk Malaysia bagi menyumbang kepada peningkatan ekonomi domestik.

PILIH LOKAL • SOKONG LOKAL • SAYANGI LOKAL

Jom beli produk lokal di Kedai Mesra PETRONAS dan tunjukkan sokongan anda hari ini!

#LoveLocal #KitaAdaKita #SupportLocal

KEMPEN BELI BARANGAN MALAYSIA

#barangbaikbarangkita

* Terdapat di stesen PETRONAS terpilih.

www.mymesra.com.my



Committed in managing the environment



Environment

New low carbon solution via **LNG offerings**

Expanded **solar panels** at PETRONAS stations

B20 Biodiesel at select PETRONAS stations

Redesigned Mesra Water Bottles with **100%** recyclable material

Creating positive social impact



Social



PETRONAS Coffee Break Campaign **>30 million** cups served since 1998

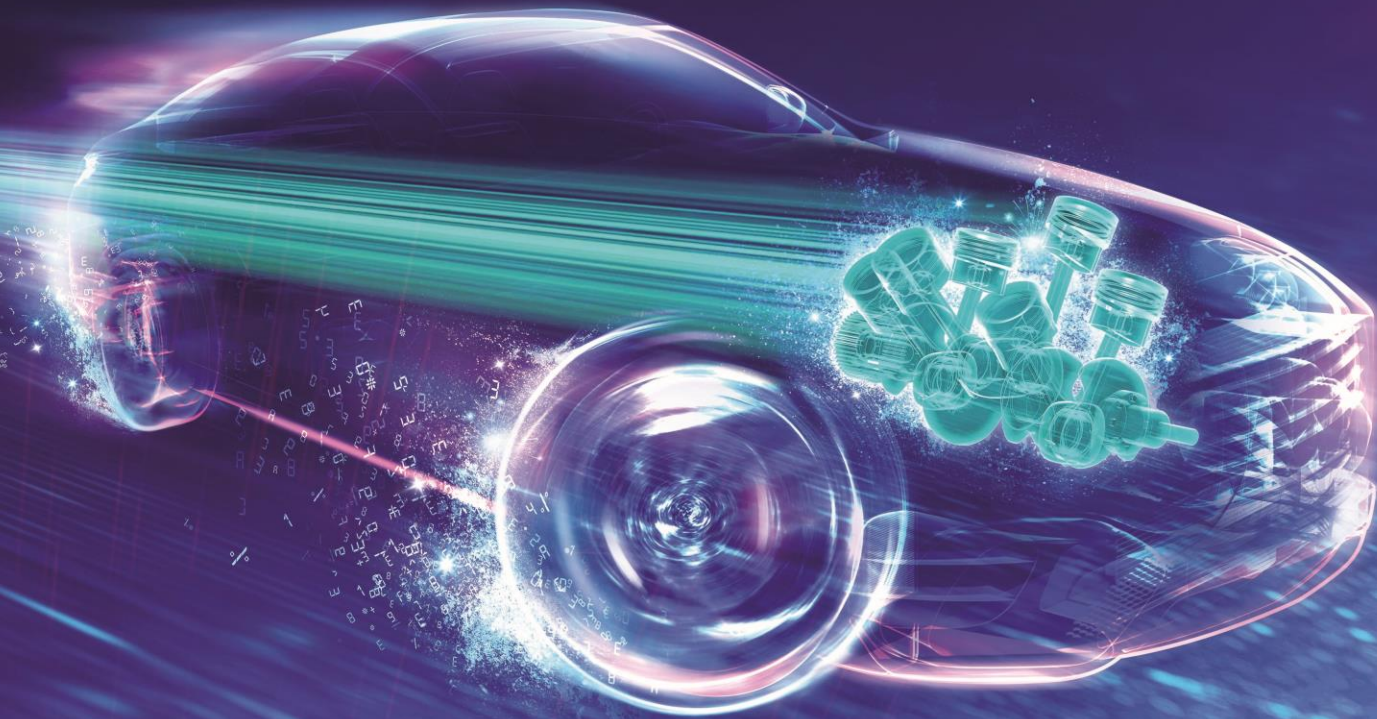
ROVR ensured uninterrupted fuel services at MCO-hit area (**> 1K vehicles** served)

Community Service to **>500** beneficiaries in **10** charity homes

PETRONAS Sentuhan Kasih Programme, benefited **>7,000** beneficiaries

Nationwide contribution to **frontliners** during COVID-19

FUTURE PROOF



- ① **Operating Environment**
- ① **FY2020 Performance**
- ① ***"Future-Proof"***
- ① **Sustainability Commitment**
- ② **Awards and Recognitions**
- ① **Sustainability Commitment**

PDB received 26 Awards for various categories in 2020



PUTRA BRAND AWARDS 2020



THE BRANDLAUREATE E-BRANDING AWARDS 2020



MSWG-ASEAN CORPORATE GOVERNANCE AWARDS



MALAYSIA TECHNOLOGY EXCELLENCE AWARDS



ANNUAL REPORT COMPETITION (ARC) AWARDS INTERNATIONAL XXXIV



4-STAR RATING BY FTSE4GOOD

BRAND AND MARKETING

HSE

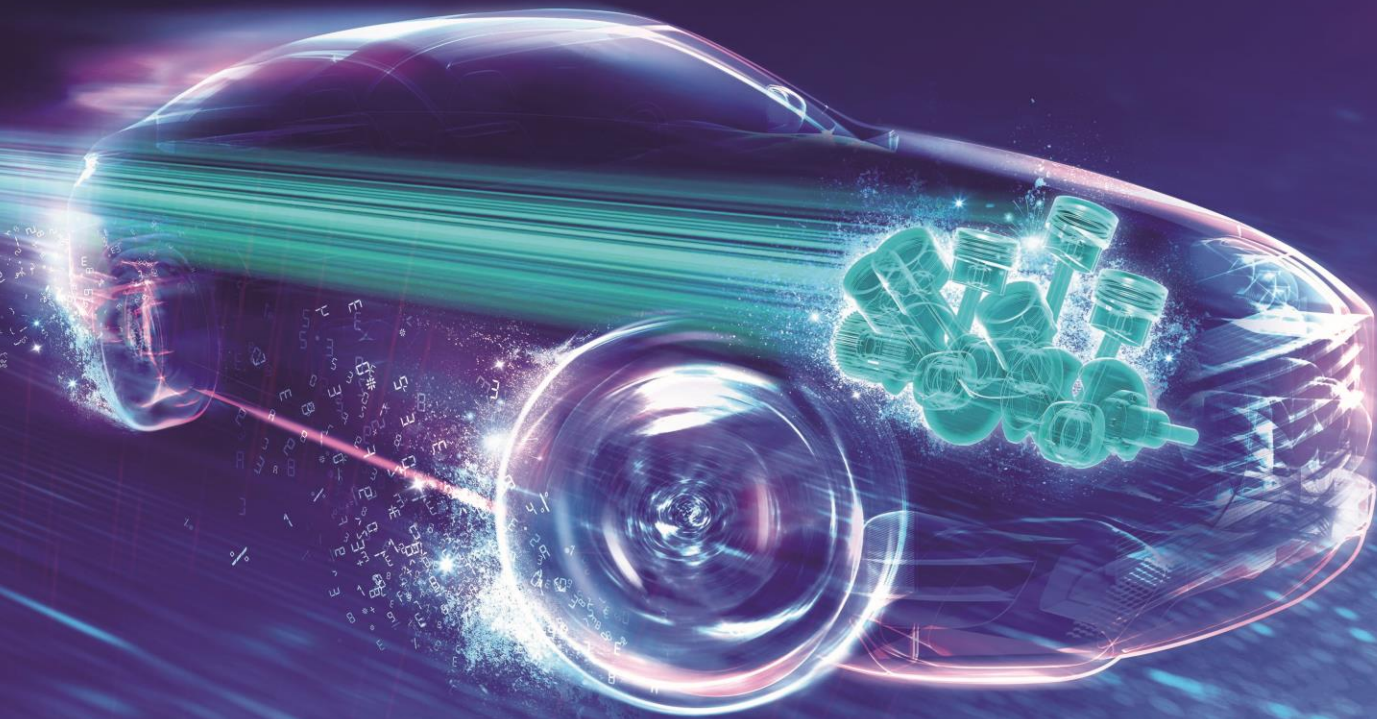
INNOVATION

GOVERNANCE

INTEGRATED REPORT

SUSTAINABILITY

FUTURE PROOF



- ① **Operating Environment**
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- ① **Moving Forward**

Future Proofing PDB

Our Pillars

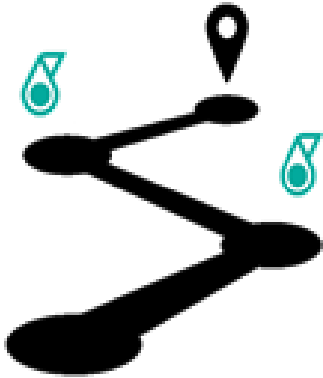
VALUE

Sustain strength of current business segments



GROWTH

Grow the non-fuel segment and capitalise on the energy transition



SUSTAINABILITY

3Ps (People, Profit, Planet) sustainability strategy



Our Promise

A man and a woman are sitting at a white round table in a brightly lit store, likely a grocery or convenience store. The man, on the left, is wearing a blue patterned shirt and is smiling while looking at a product on the table. The woman, on the right, is wearing a grey hijab, glasses, and a red and white striped shirt. She is also smiling and looking at the products. On the table are several items: a yellow bag of 'BROWNIE CHOCOLATE' snacks, a purple bag of 'BROWNIE WALNUT' snacks, and a green can of 'COCO' beverage. The background shows shelves stocked with various products, and a person wearing a face mask is visible in the distance. The overall atmosphere is warm and inviting.

“Making your everyday life simpler and better”

Thank you

