

Direct Energy Business

Your partner for end-to-end energy solutions

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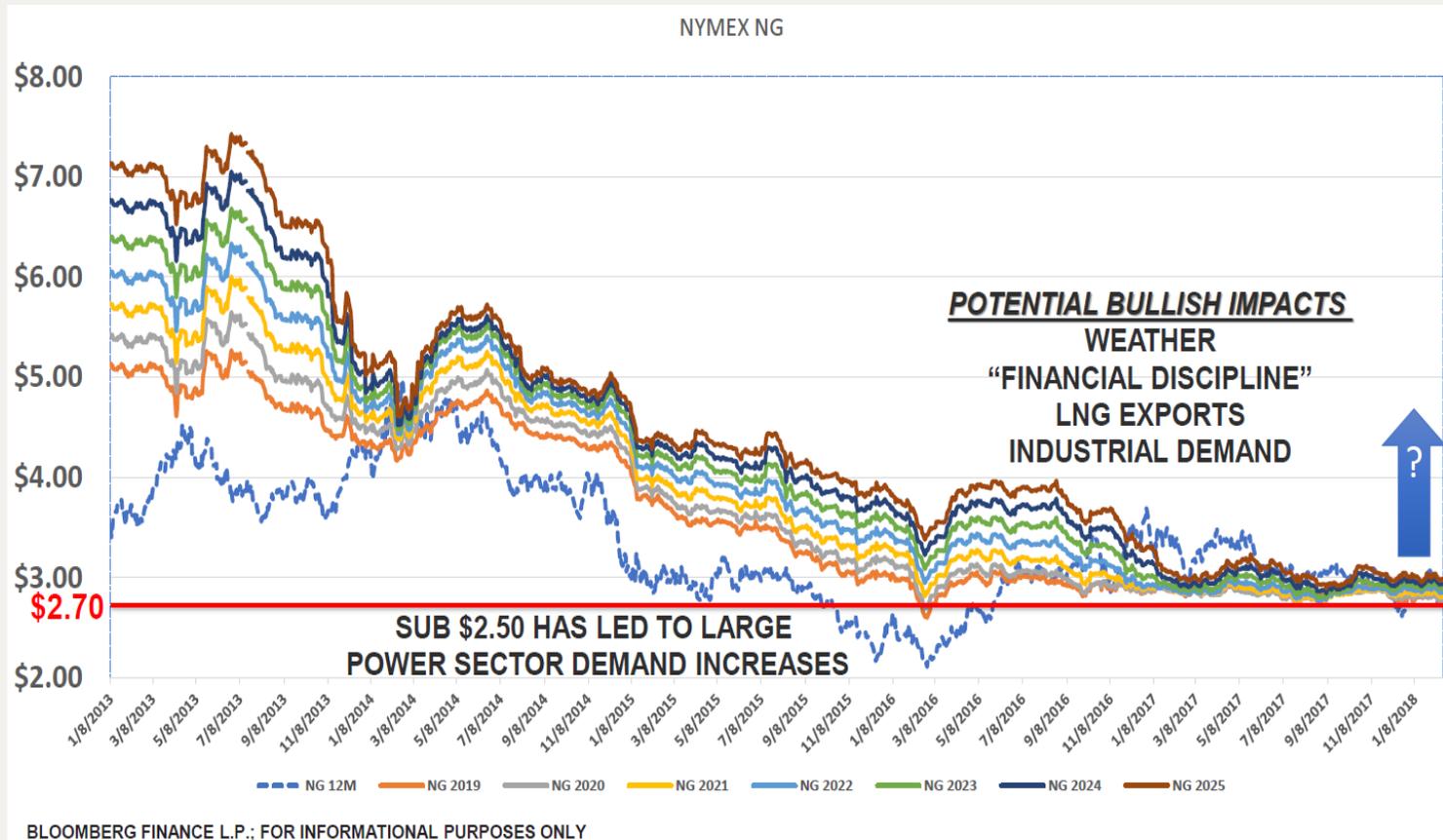
Two ISSUES +

Flat Prices - Beware

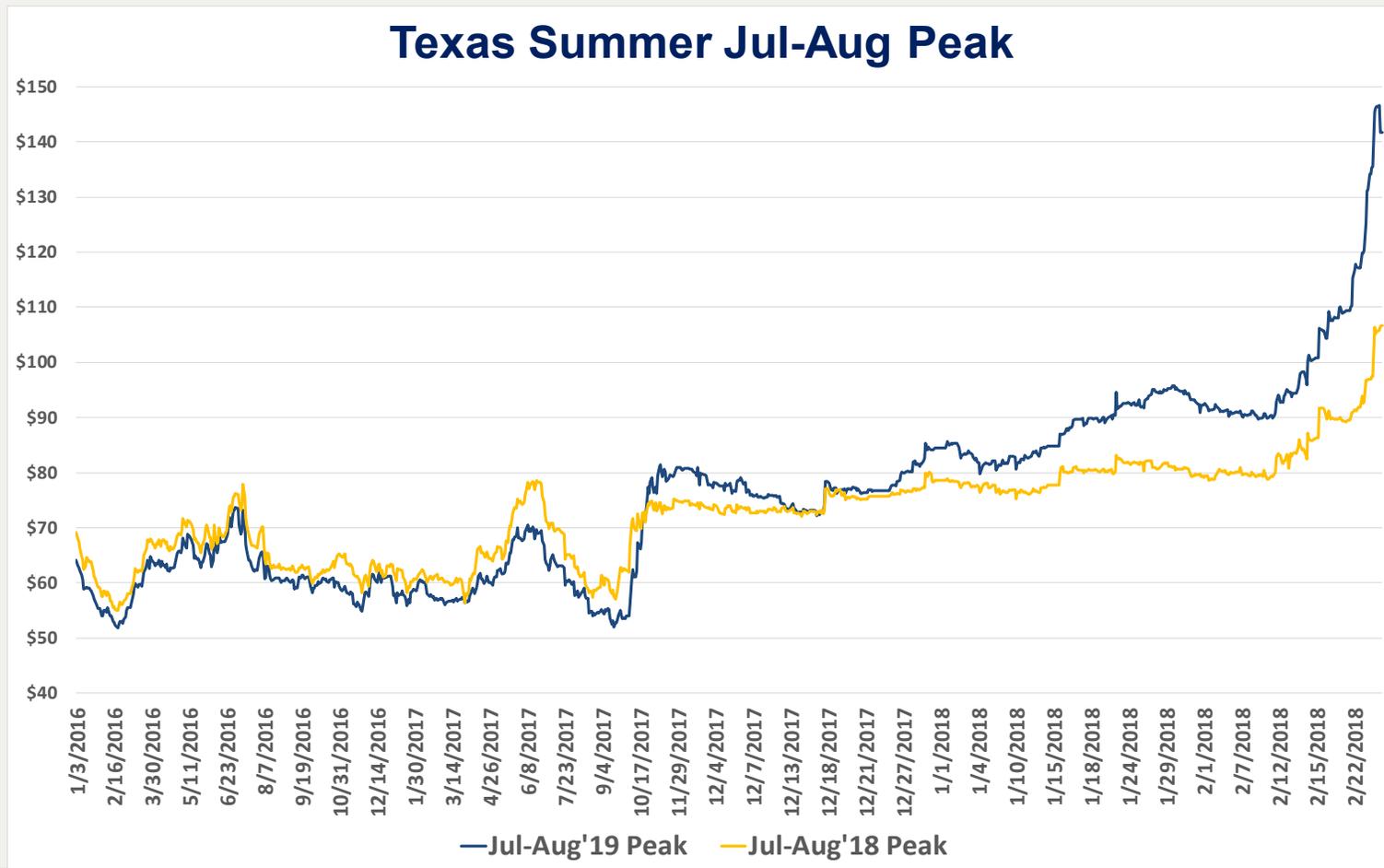
Changes in Supply Costs

Renewables

FLAT FUTURE PRICES!!



BEWARE !!!! SUMMMER 2018-2019 PEAK = MOVING HIGHER



Trends and total price build-up examples

Duquesne

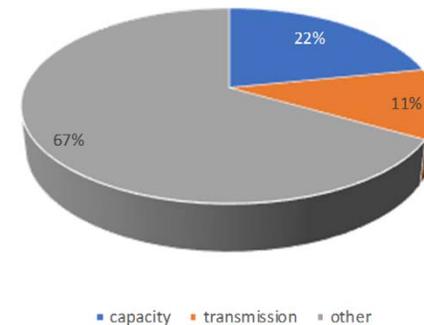
- NITS rate up by over 200%
- The average Duquesne customer in 2009 paid \$5.50/ MWh for NITS
- Today, that same customer pays \$12.25/ MWh

PSEG

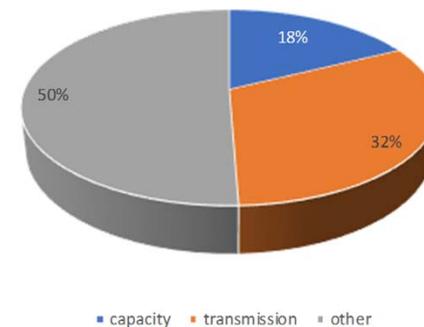
- PSEG has increase its NITS rate by over 500% (since '11)
- The average PSEG customer paid \$6.30/MWh in 2011
- Today, that same customer pays 32.00 / MWh

Since 2014 NITS (Transmission) costs have increased from 11% to over 30% of supply costs

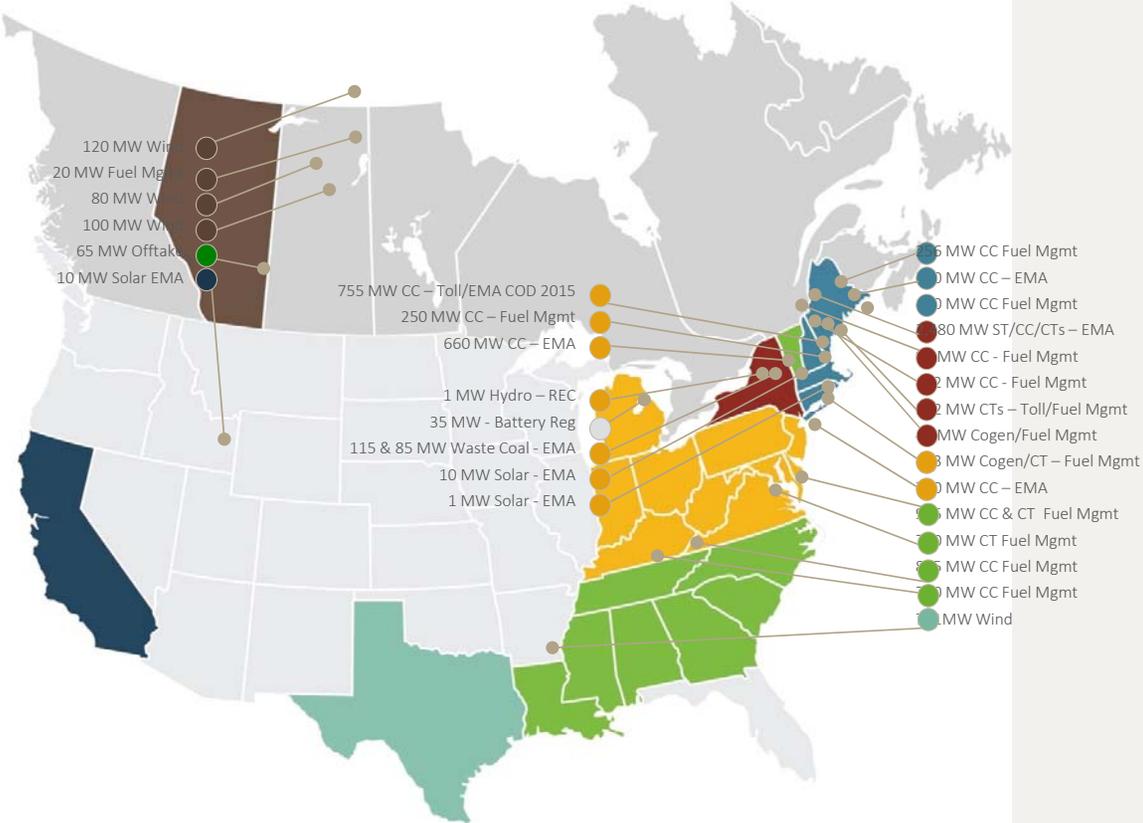
Capacity and Transmission Costs 2014



Capacity and Transmission Costs 2018



Wholesale Power Management





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We are a leading, international energy and services company. Everything we do is focused on satisfying the changing needs of our customers.

\$40bn
Group revenue

\$15.5bn
North America revenue

27m
Customer accounts

36k
Employees worldwide

200+
Years in business

Global 500
Investment grade publicly listed

Through our brands- Direct Energy, Centrica Business Solutions, British Gas, and Bord Gáis- we provide energy supply, service, and solutions to homes and businesses internationally.



Direct Energy.

- 0.6m business supply points
- 5,827mmth gas consumption
- 91TWh power consumption

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Business Solutions

- 543 MW under management
- Active customer sites: 3,924
- 9 regional offices

British Gas

- 0.7m business supply points
- 533mmth gas consumption
- 13TWh power consumption

Bord Gáis Energy

- 41k business accounts
- 62mmth gas consumption
- 150GWh power consumption