

Investor Presentation

A Leading Super-Specialty
Healthcare Provider in the GCC

August 2026



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01



At a Glance

Leading Super-Specialty Healthcare Provider in the Gulf

Leading Super-Specialty Healthcare Provider in MENA

Our Vision

To be the Gulf's most trusted healthcare provider, delivering world-class, compassionate care through advanced technology and skilled professionals.

Multi-Brand Portfolio



Network Scale

94

Healthcare assets incl. 20 hospitals¹

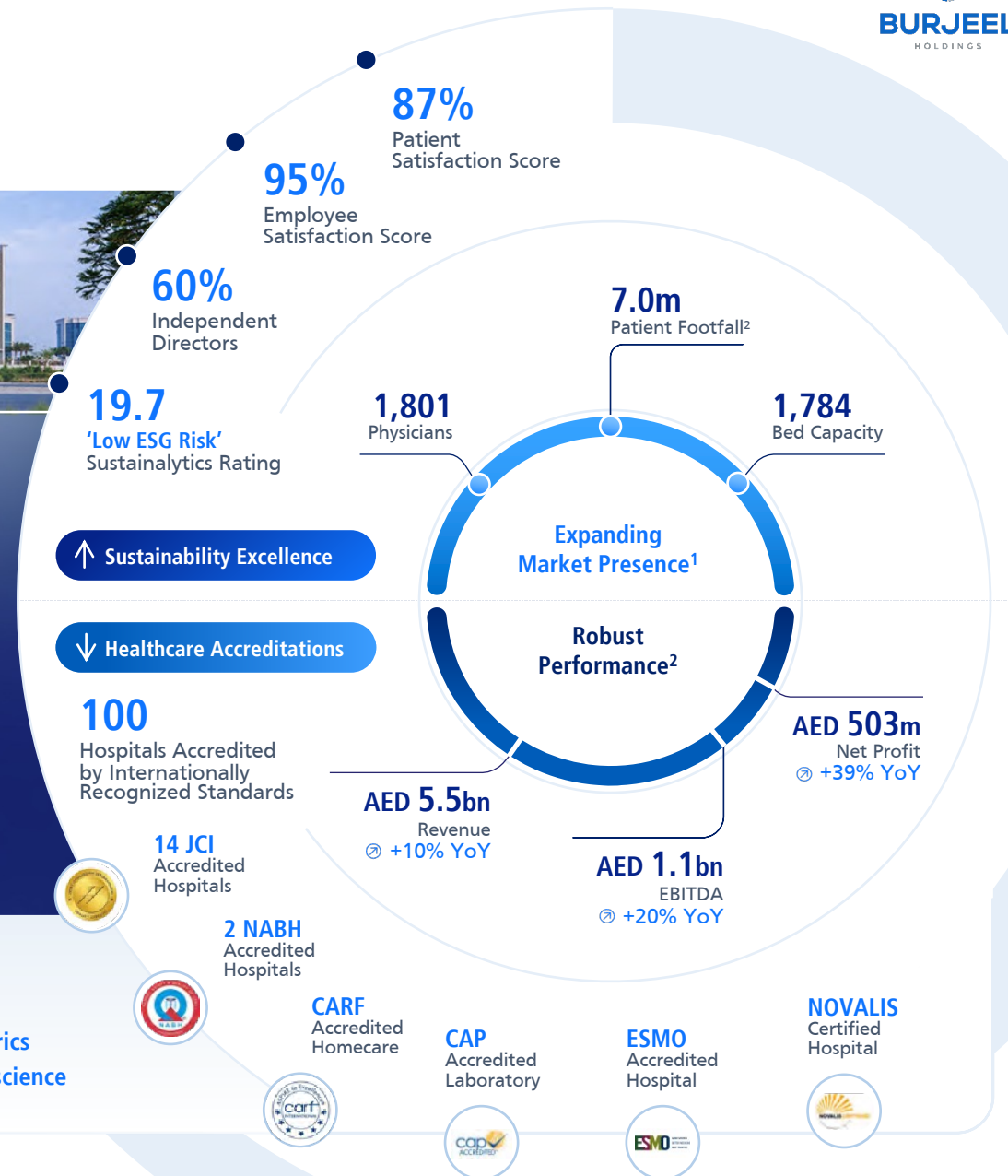


Super-Specialty Depth

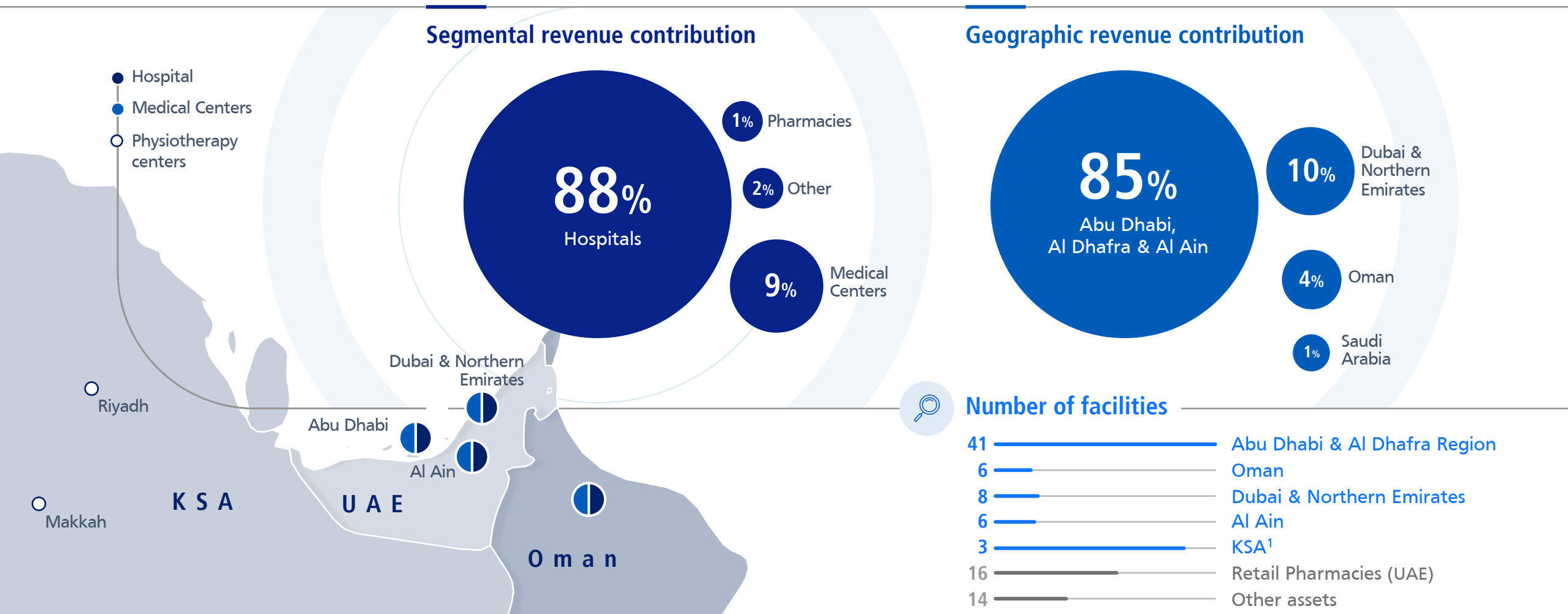
30%

Revenue from Super-Specialty Care

- Oncology
- Organ Transplants
- Orthopedics & Spine
- Advanced Women Care
- Pediatrics
- Neuroscience

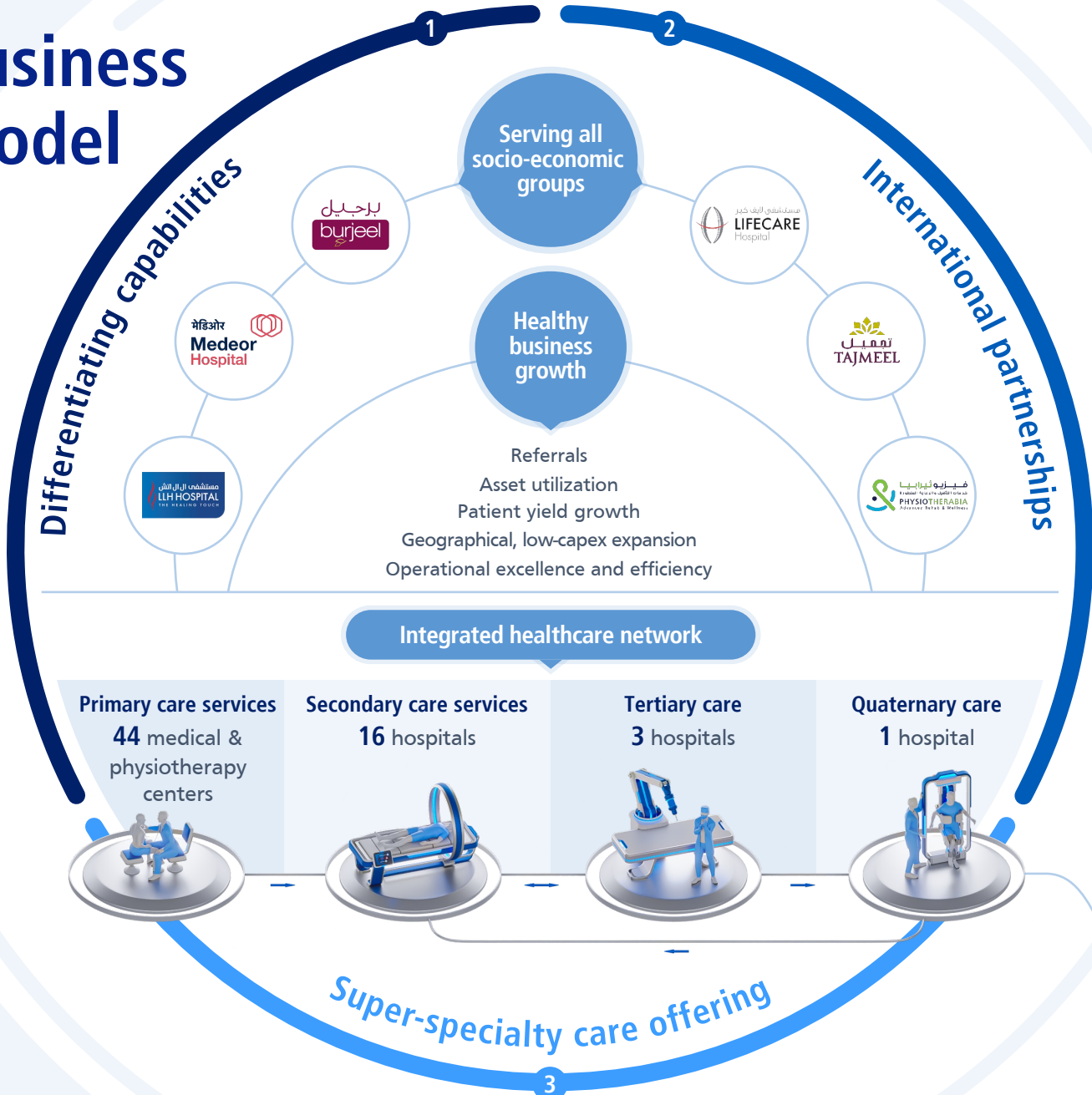


High Quality, Large-scale Portfolio of Assets Across Geographies



Note: Revenue contribution based on FY 2025. Number of facilities as at 30 June 2026. (1) In H1'26, the Group and its joint venture partner agreed to wind down the PhysioTherabia JV, comprising 28 centers. The Group's wholly owned, standalone physiotherapy centers — Makkah's Specialist Physiotherapy Center and PhysioTrio Physiotherapy Center in Riyadh — remain unaffected. Figures also include Vitality Home Health Services in Saudi Arabia, classified as a medical center.

Business Model



Note: Number of facilities as at 30 June 2026

Oncology

Immunotherapy

Palliative Care

Precision Diagnostics

Nuclear Medicine

Medical & Radiation
Oncology

Surgical Oncology

Bone Marrow
Transplants



End-to-End Complex Care Platform

Multi-Organ Transplant

Kidney & Liver
Transplants

Living & Deceased
Donation

ABO-Incompatible
Cases

Pediatric Transplants

Robotic
Transplant Surgery

Transplant
Immunology



 **مركز باي الشرق الأوسط**
MIDDLE EAST CLINIC
Abu Dhabi, UAE
Advanced Specialty Center

Limb Reconstruction &
Deformity Correction

 **ALMUHERIS**
OSSEointegration CLINIC
AT THE Paly INSTITUTE

Advanced Bone-
Anchored Prosthetics

 **BOI** BURJEEL
ORTHOPEDIC
INSTITUTE

DoH-Accredited
Center of Excellence

Nader Sports
Medicine Center

Robotic Surgery
Center

Advanced
Rehabilitation



Orthopedics & Trauma

 Advanced
Gynecology
Institute

Minimally Invasive
& Robotic Gynecology

Level III NICU & PICU

15+ Pediatric Sub-
Specialties



 **Trust**
UAE's Largest AI-Enabled
Fertility Center

 **ifem**
Center of Excellence for
Endometriosis Care

Advanced Fetal
Therapy for High-
Risk Pregnancies

Women & Children's Care

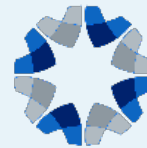
02



Strategic Priorities

Leading Super-Specialty Healthcare Provider in the Gulf

Vision for Value-Creative Growth



BURJEEL
HOLDINGS

Ramp-up of Growth Assets

- Maximize utilization of the young asset base to drive volume
- Position Burjeel Medical City as the flagship complex-care hub
- Grow cross-network referrals through community clinics
- Accelerate medical tourism growth from key emerging markets

Operational Excellence

- Strengthen multi-disciplinary care and centralized operations
- Advance medical innovation, education, and research
- Integrate Oracle Cerner for real-time, data-driven care
- Accelerate advanced technology and AI adoption

Solidify Leadership in High-Complexity Care in the GCC

Drive Expansion in KSA with Disruptive Healthcare Innovations

Increasing Patient Yield

- Strengthen specialty depth across key super-specialties
- Repurpose bed capacity for high-complexity cases
- Optimize network capacity across brands
- Enhance digital engagement with a multi-faceted approach

Geographic Expansion

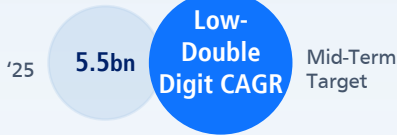
- Expand the hub-and-spoke network across the UAE
- Establish our primary & day-surgery platform in KSA
- Scale the GCC radiation oncology platform
- Leverage a strong O&M pipeline across GCC & Africa

Strategic Growth Pillars

Ramp-up of Growth Assets



Group Revenue (AED)



Bed Capacity Utilization



BMC-Revenue (AED)



Increasing Patient Yield



Patient Yield (AED)



Revenue from Complex Care



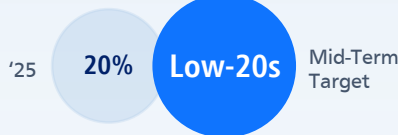
High-End Patient Mix



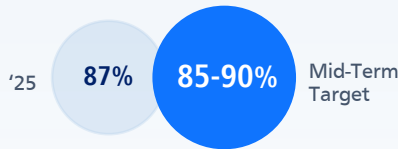
Operational Excellence



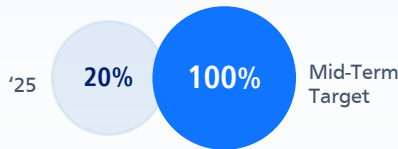
Group EBITDA Margin



Patient Satisfaction



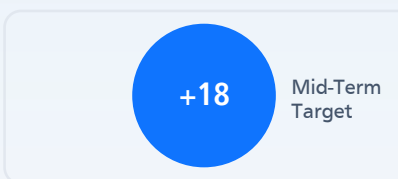
Oracle Cerner Integration



Geographic Expansion



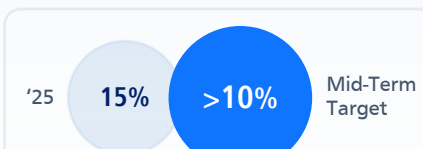
New Healthcare Assets



Revenue from Expansion Projects (AED per annum)



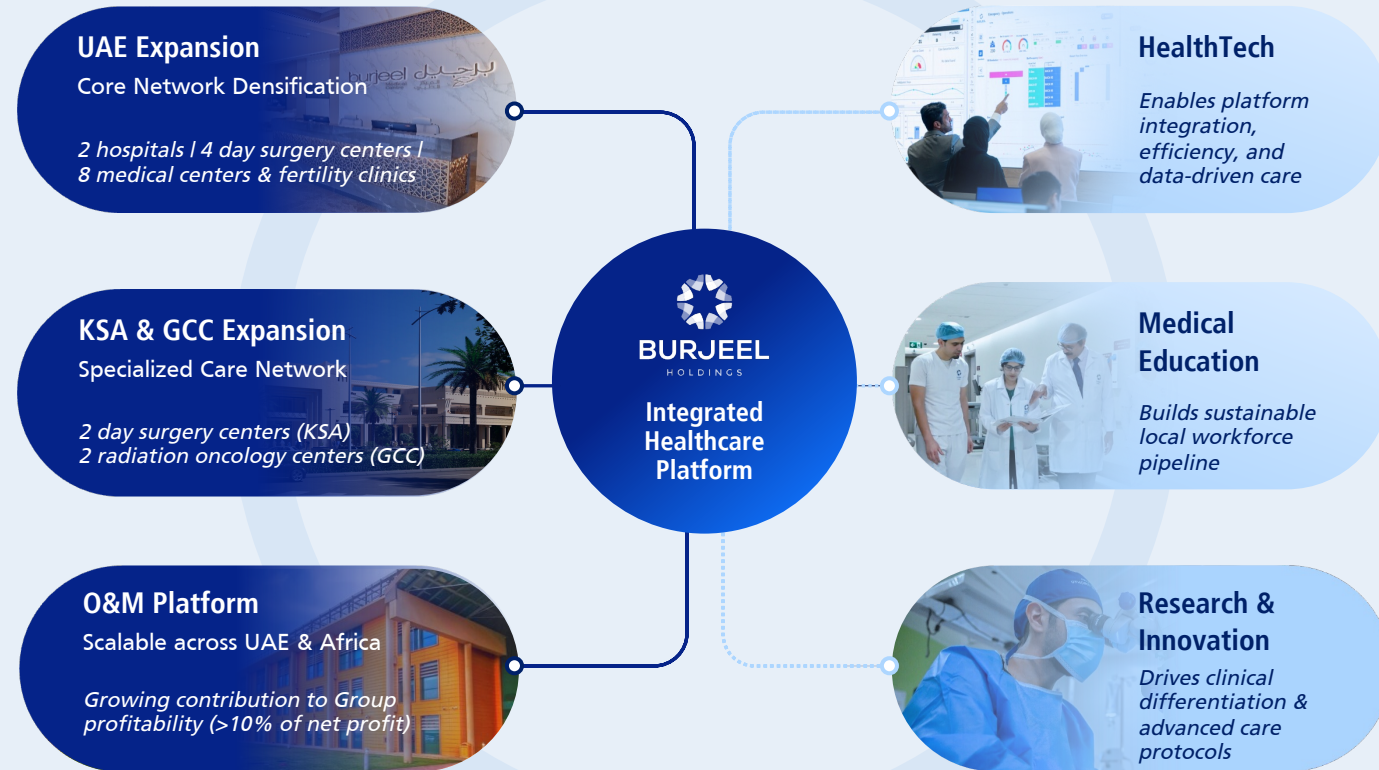
O&M to Group Net Profit



Note: Top-line and bottom-line guidance reflect the impact of regulatory changes under the Unified Procurement Program (UPP), which altered medicine procurement and revenue recognition mechanics. Excluding the UPP impact, underlying operational performance and demand trends remain intact.

Reiterated Strategy: Anchoring the UAE Platform, Scaling Asset-Light Growth Across GCC & Beyond

Targeted investments to expand the network while building scalable, capital-efficient platforms



Balanced capital allocation to support sustainable growth



UAE Platform First: Driving Integration & Excellence

- Network expansion across care continuum
- Digital and AI integration across operations
- Focus on efficiency, outcomes, and patient experience
- Development of talent and innovation capabilities



Regional Growth Model: Scalable & Capital-Efficient

- KSA primary & day surgery network expansion
- GCC specialized care platforms
- O&M-led expansion in UAE and Africa
- Replication of proven operating model across markets

03



Investment Highlights

Leading Super-Specialty Healthcare Provider in the Gulf

Investment Highlights: Healthcare's Investment of Choice

1 Leading Position in a Large & Growing Healthcare Market

\$99bn
GCC Healthcare
Market Size (2023)

1.6x
GCC Healthcare Market
Growth (2023–2029)

21%
Burjeel Holdings Private
Hospital Market Share in
the UAE (2023)

2 World-Class Super-Specialty Care Driving Patient Yield Growth

30%
Revenue from
Complex Care

AED 50k–1m
Complex Procedure
Range

UAE First-Mover
In Pediatric Liver, Bone
Marrow, Fetal Surgeries

3 Well-Invested Multi-Brand Network Enabling Accessible Healthcare Across Many Segments

94
Healthcare assets
incl. 20 hospitals

AED 5.3bn
Capital Investment
since Inception

<15%
Contribution
per Private Insurer

4 High-Growth Asset Mix with Significant Utilization Headroom

60%
Hospitals in
Growth Stage

28%
Mature Hospitals
EBITDA Margin

67%
Group Bed
Occupancy Rate

5 Expanding Geographically Through High-Return & Low-CAPEX Opportunities

AED 1.5bn
Mid-Term Revenue
from Expansion

+18
Healthcare Assets
Added in Mid-Term

>10%
Mid-Term O&M
Contribution
to Group Net Profit

6 Accelerating Digitization Driving Operational & Clinical Excellence

100%
Oracle Cerner
Integration
by 2027

100%
Revenue Cycle
Automation via AI
(2025)

14%
Digital Penetration in
Appointments
(2025)

7 Cash-Generative Business Model Delivering Consistent Shareholder Return

>45%
Free Cash Flow
Conversion

1.8x
Net Debt / EBITDA
(as of 30 Jun 2026)

40–70%
Dividend Payout
Ratio

8 Commitment to ESG with Low-Risk Rating & Outstanding Governance

19.7
'Low ESG Risk'
Sustainalytics Rating

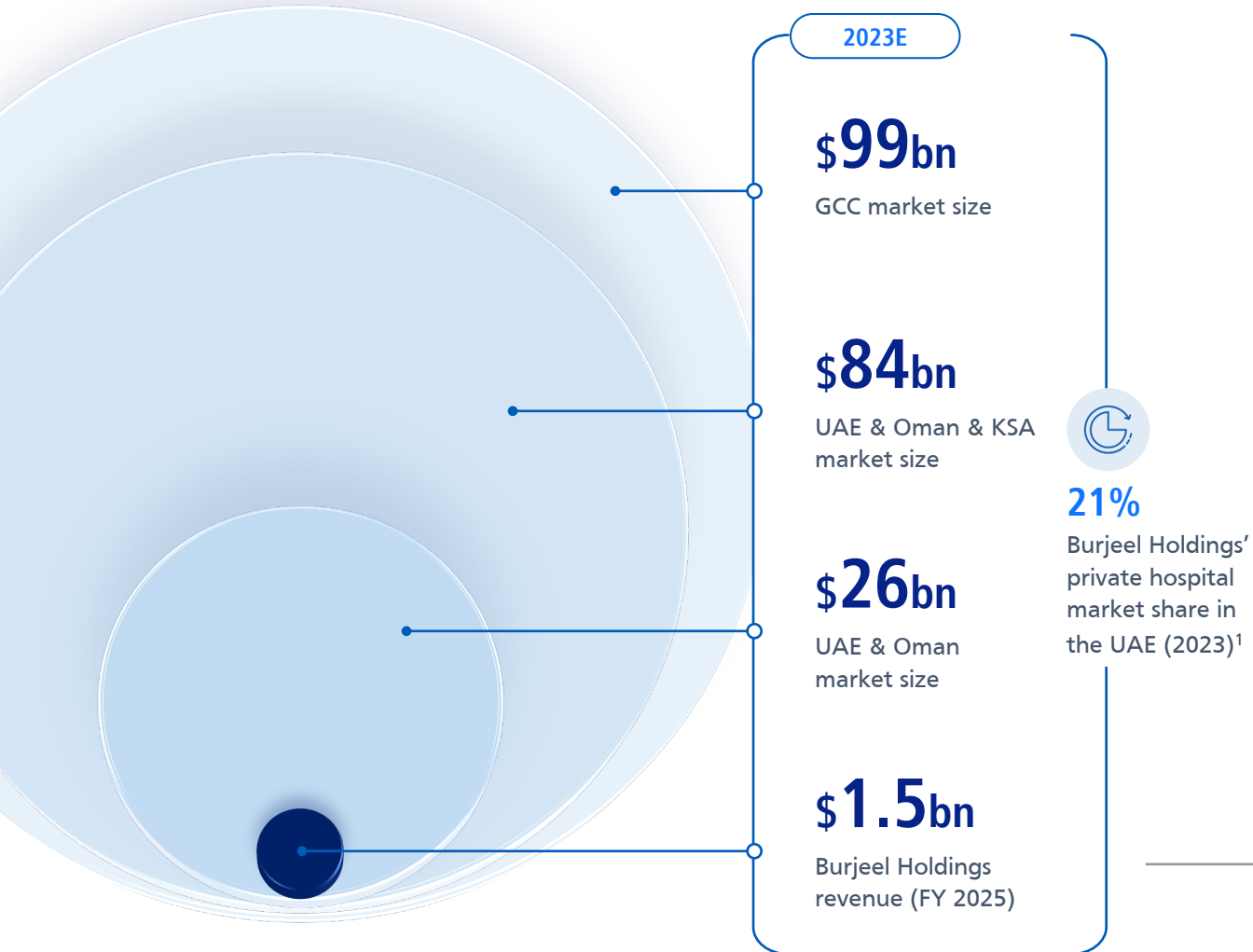
95%
Employee
Satisfaction Score

87%
Inpatient
Satisfaction Score

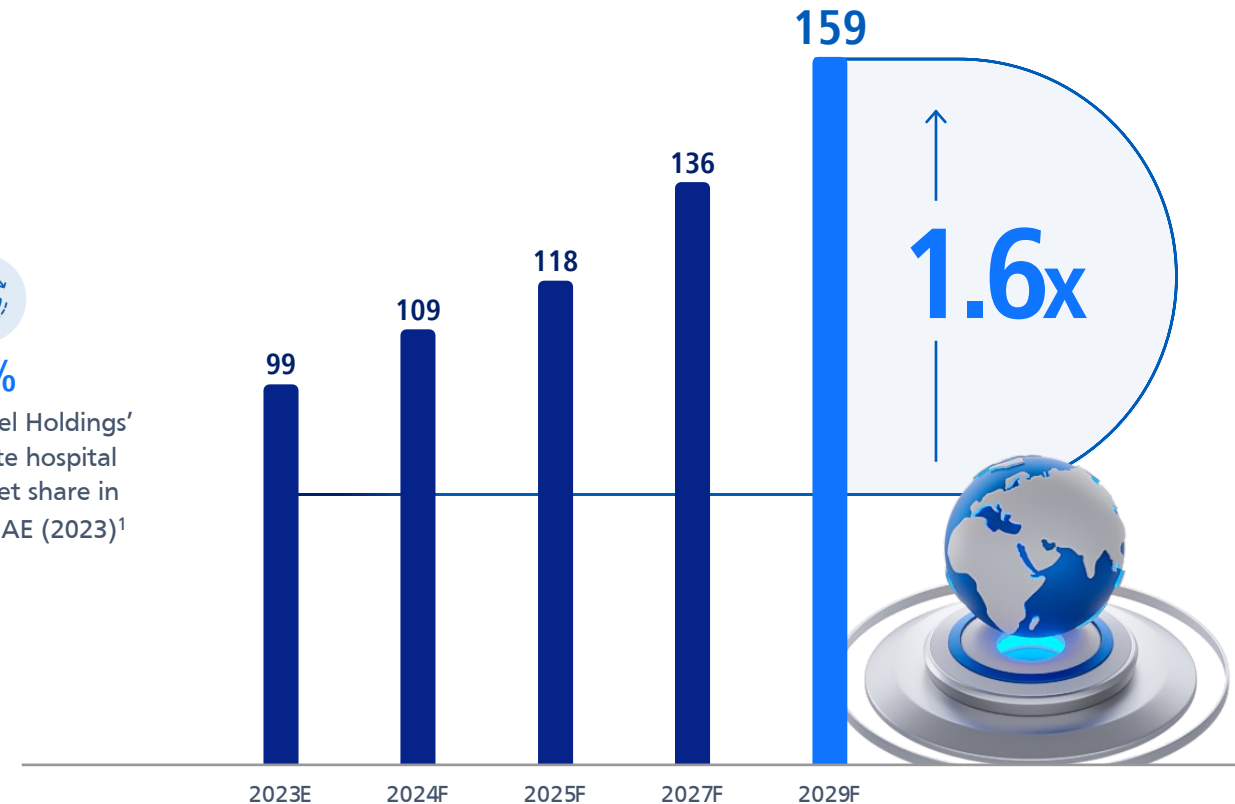
60%
Independent
Directors



Market Leading Position in Large, Growing, & Resilient Market



Total Healthcare Expenditure in the GCC



Super-Specialty Care Offering Driving Patient Yields

Unmatched
Innovation & Expertise

Momentum in Scaling

Maximizing Patient Growth & Yield



BMC
BURJEEL MEDICAL CITY

Multi-Organ & Bone Marrow Transplants

BCI
BURJEEL CANCER INSTITUTE

Consolidated UAE's Largest Cancer Care Network

Advanced Gynecology Institute

Advanced Gynecology Institute

ifem
INSTITUTE FOR ENDOMETRIOSIS

Center of Excellence for Endometriosis

Middle East Clinic
عيادة بالي الشرق الأوسط
Abu Dhabi, UAE
Orthopedic & Spine

Renowned Dr. Paley Orthopedic & Spine Clinic

ONCO HELIX LAB

Advanced Molecular Genetics Lab

Trust
FERTILITY CENTRE

UAE's Largest Fertility Center

Thyroid Parathyroid Center



Liver & Kidney Transplants
86 (100% success rate)
Since inception

Multi-Organ Transplants
AED 250,000 – 1,000,000



IVF, FET, & IUI Cycles Initiated
1,900
FY'25

Advanced IVF & Fertility Services
AED 20,000 – 40,000



Complex Orthopedic Surgeries (Paley Clinic)
570 FY'25

Complex Orthopedic Surgeries
AED 350,000 – 500,000



Neurosurgeries
1,290 FY'25

Neurosurgeries
AED 50,000 – 150,000



Medical & Surgical Radiotherapy
18,310 FY'25
9,460 FY'25

Medical & Surgical Oncology & Radiotherapy
AED 10,000 – 80,000



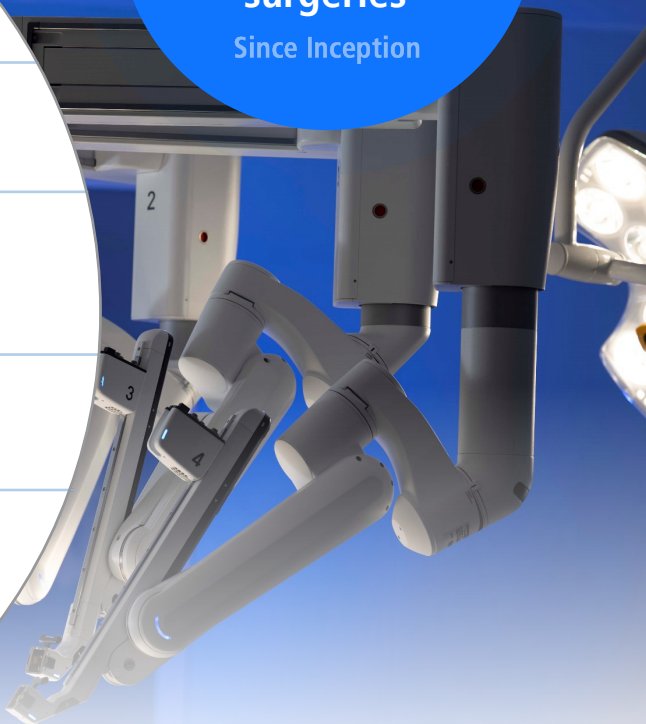
Bone Marrow Transplants
178 (68 pediatric)
Since inception

Bone Marrow Transplants
AED 200,000 – 250,000

Da Vinci Xi system

1,075
surgeries

Since Inception



World-Class Care Beyond Borders

Seamless, End-to-End International Patient Care Model

Burjeel Medical City: A Global Healthcare Platform

-  A global patient referral hub for **tertiary and quaternary care**
-  Located in Abu Dhabi, BMC is only a **4-6 hour flight** for many international patients
-  Comprehensive multi-disciplinary super-specialty care & internationally trained physicians
-  Supports the UAE's ambition as a **global healthcare destination**

Integrated Offerings for International Patients

- **Comprehensive Care Packages:** Treatment + travel + accommodation + leisure
- **Remote & Virtual Services:** Pre-arrival consults, second opinions, post-care follow-up
- **Strategic Collaborations:** International partnerships for training & healthcare development

Patient Acquisition & Engagement

Acquisition Channels:

- International doctors & networks,
- Governments,
- Corporate Entities,
- Direct Channels

Engagement Approach:

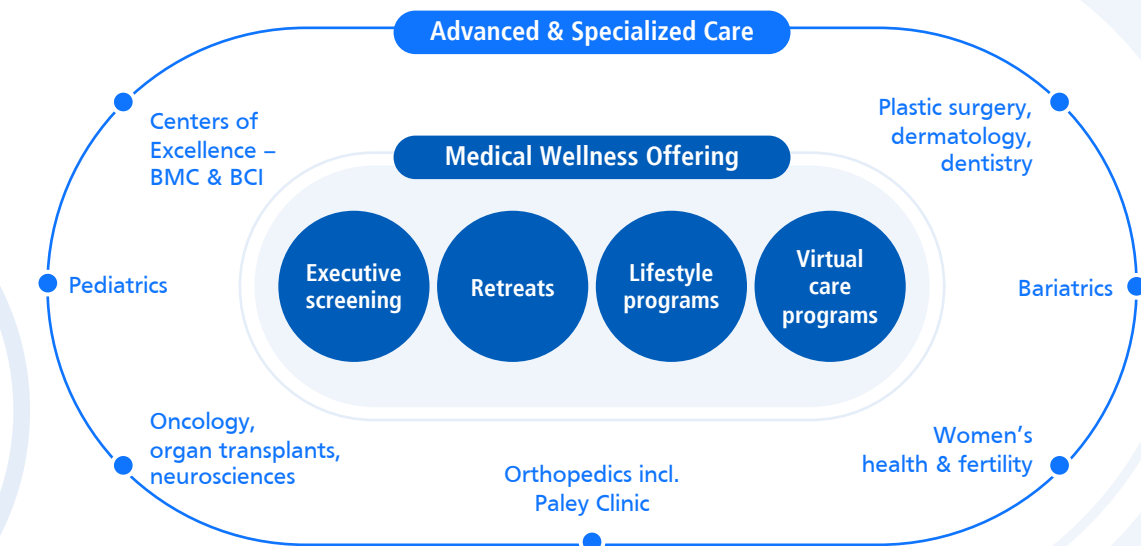
- Abu Dhabi as a healthcare hub,
- Virtual consultations,
- On-ground presence in priority markets.



Patient Journey

- **Pre-Travel**
 - Concierge consultation
 - Personalized treatment plan
 - Travel & medical coordination
- **Health Experience**
 - Treatment at BMC (Global Referral Hub)
 - On-the-ground coordination
 - Multidisciplinary care teams
 - Centers of Excellence
- **After Care**
 - Recovery support & follow-ups
 - Telemedicine & continuity of care
 - Flexible payment & concierge services

Clinical Excellence & Service Portfolio



Osseointegration Clinic Case Study: Scaling a Differentiated Limb Restoration Platform

Transforming Limb Restoration

40+

Surgeries
Since Inception
(Sep'25)



Led by Dr. Munjed Al Muderis,
world-renowned orthopedic surgeon

Invented direct bone-anchored
prosthetics — a revolutionary
solution for amputees

A lower price compared
to US (\$95k–\$150k)

Trusted by military veterans,
trauma patients, and high-
performance amputees

The Middle East's 1st Osseointegration Clinic
with an Integrated model: Surgery, rehab,
and prosthetic fitting under one roof

ALMUDERIS
OSSEOINTEGRATION CLINIC
AT THE Paly INSTITUTE

Mid-Term Strategic Initiatives (2026 – 2027)

-  Scale advanced limb restoration and osseointegration through international referrals
-  Expand robotic and minimally invasive orthopedic and spine surgery
-  Advance sports medicine and arthroscopy integrated with rehabilitation services
-  Enhance Level I trauma and neuro-spine care pathways
-  Develop advanced prosthetics, gait-lab, and biomechanics capabilities



Integrated Research & Education Powering Clinical Excellence & Talent Development

Clinical Research

540+
Publications
Since Inception

140+
IRB-Approved Clinical
Studies (Phase 1–3)

Rare Disease, Hematology & Cell & Gene Therapy

- Thalassemia leadership: Phase 3 trials and global guidelines
- Disease cohorts: gene and gene/cell therapy expansion

Advanced & Emerging Platforms

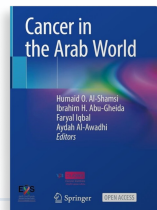
- Global partnerships: Axiom Space and US R&D hub
- Commercialization: manufacturing translation

Specialist Science

- Clinical trials: IBD and infectious disease
- Pipeline expansion: neuroscience, metabolic and cardiovascular

Medical Oncology

- Global trials: Phase 2–3 precision oncology
- AI research: omics and translational programs



Medical Education



Talent Pipeline

1,400+ Trainees Across
36 Specialties

- Structured observership-to-residency pathway

Specialist Training

- **11** Accredited residency programs
- CME & CPD supporting continuous development

Accredited Platform

6 accredited teaching hospitals

19 global & local academic partnerships



Clinical Workforce Strength

1,800+ Doctors
>30% in super-specialties

4,300+ Nurses
Enabling care delivery at scale

95%
Employee Satisfaction

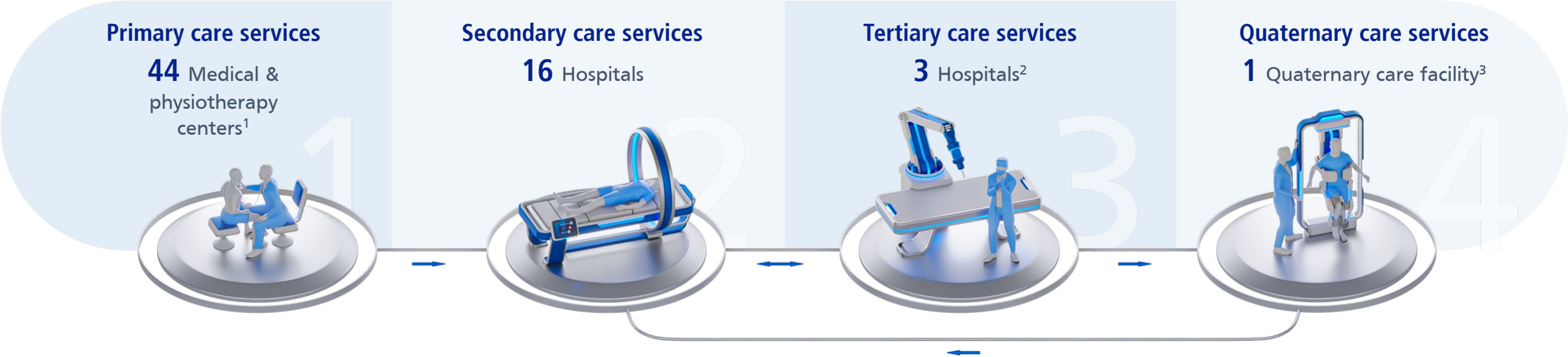
15% Clinical Turnover
Below Industry Average



Unique Business Model Leveraging Multiple Touchpoints

Well-invested and a full-scale hub-and-spoke model enables the Group to capture value across the entire patient pathway through multiple touchpoints – driving revenue, brand engagement and Group loyalty.

CAPEX spent from inception **AED 5.3bn**

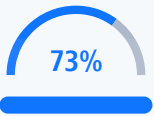
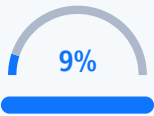
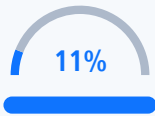
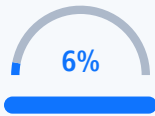


Case in point | Patient journey for surgical treatment



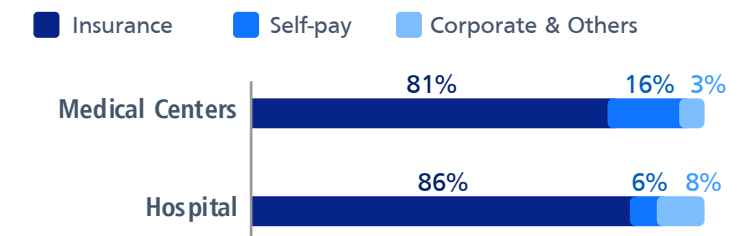
Notes: (1) Including 2 physiotherapy and rehabilitation centers in KSA, as well as homecare services centers. (2) Hospitals – Burjeel Abu Dhabi, Burjeel Hospital Muscat, Lifecare Musaffah. (3) Burjeel Medical City.

Leading Brand Portfolio Serving Entire Socioeconomic Spectrum

Brands				
Assets ¹	12 Hospitals ² 10 Medical centers ³	2 Hospitals 1 Medical center	4 Hospitals 13 Medical centers	2 Hospitals 4 Medical centers
Target population ⁴	High income population 48% Emirati patients	Middle class expat population 98% Expat	Mid to low-income population 100% Expat	Industrial workers 100% Expat
Revenue contribution ⁵				
Key UAE competitors				
Bed occupancy				

Diverse brand portfolio and network creates favourable negotiating position with insurance payers

Payer Mix Revenue⁶



Diversified insurance base – no single payer >15% share⁶

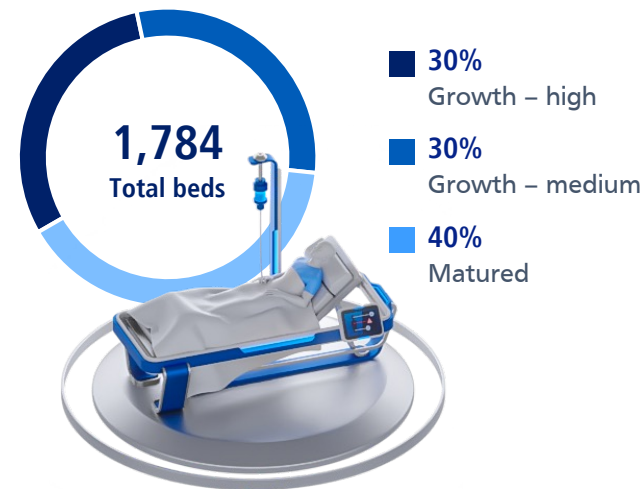
- 15% Payer 1
- 10% Payer 2
- 10% Payer 3
- 5% Payer 4
- 3% Payer 5

43%
Top-5 Insurers
(ex-Thiqa)

Notes: (1) As at 31 December 2025. (2) Includes included Advance Care Oncology Centre. (3) Including two homecare services centers in the UAE and KSA. (4) Excluding retail pharmacies. (5) Based on FY 2025. Post-intersegmental eliminations. The remaining 1% of revenue contribution comes from Tajmeel assets, Retail Pharmacies, and the Group's Other segment (including PhysioTherabia, etc.). (6) Based on FY 2025.

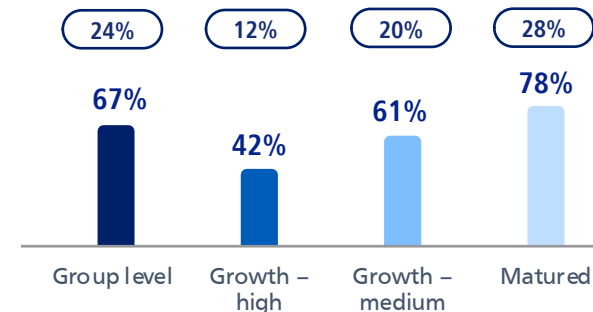
High-Growth Asset Mix with Significant Utilization Runway

Asset Maturity Split for Hospitals¹



Bed Occupancy by Hospital Maturity²

% Hospitals EBITDA Margin by Maturity (FY'25)³

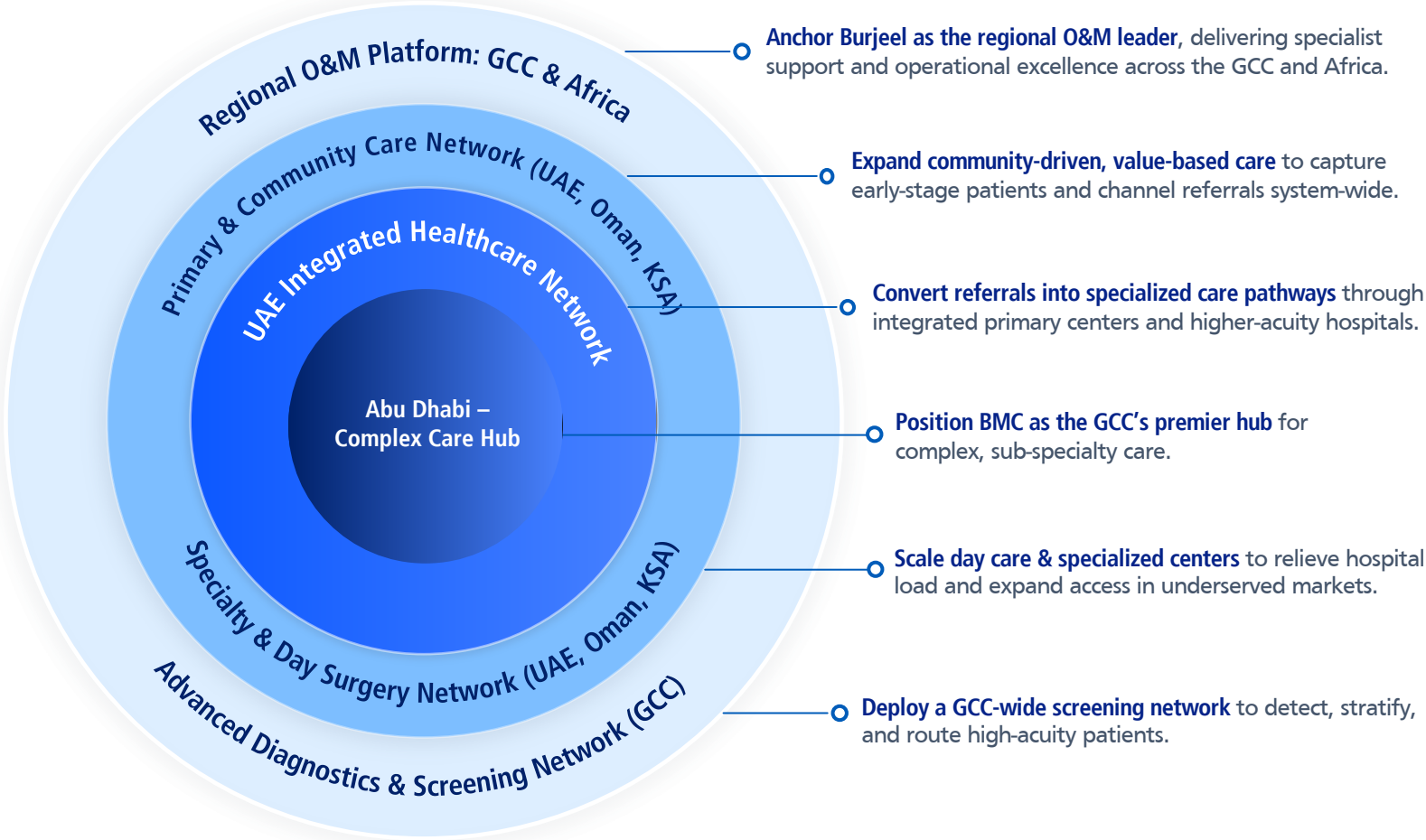


Burjeel Medical City – significant opportunity to ramp up utilization with superior patient yields



FY 2025	Mature	Growth
	Burjeel Hospital, Abu Dhabi	Burjeel Medical City, Abu Dhabi
Overview	- The largest EBITDA contributor, located in a highly populated area in the center of Abu Dhabi city 30 key specialities incl. Neuro and Cardiac Surgery, Orthopaedics and Paediatrics - Caters to premium clientele	- The largest private medical healthcare facility in the UAE: quaternary, long-term, and palliative care 60+ key specialities incl. haematology, oncology, bone marrow and multi-organ transplantation - Caters to ultra-premium clientele
Year established	2012	Q4 2020
Beds / Size	299 beds. / 77 k sq m	434 beds. / 112 k sq m
Revenue ³	AED 1.1bn	AED 1.3bn
EBITDA margin	28%	19%
Inpatient occupancy	71%	61%
Total ARR ⁴	AED 1,417	AED 2,214

Differentiated Growth Strategy Driving Specialized Care Across Network



Large, Growing, & Resilient Addressable Market



\$99bn

GCC market size (2023)¹



21%

Burjeel's market share in the UAE (2023)²



+1.6x

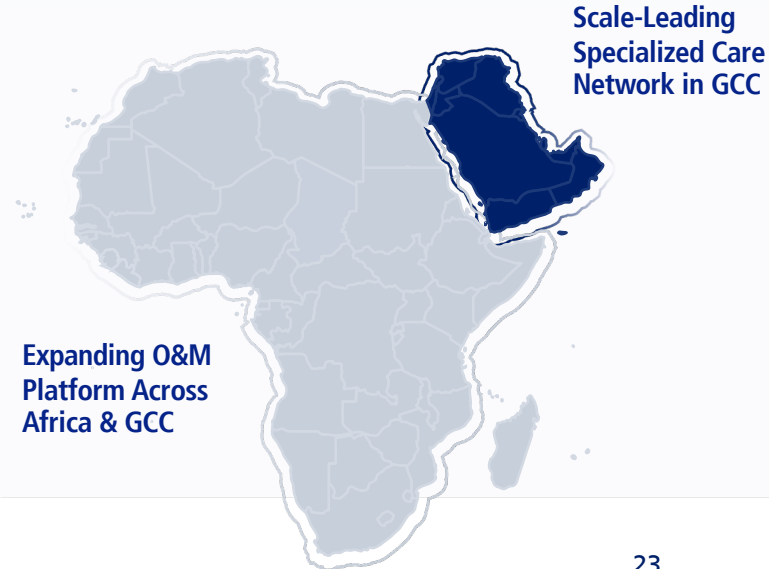
GCC market size growth (2023-29)¹



\$1.5bn

Burjeel Holdings revenue (2025)

Regional Footprint Across GCC & Africa



(1): Alpen Capital GCC Healthcare Industry Report (February 2025). (2) Burjeel Holdings' UAE market share calculated by the Company based on MOHAP data for the number of private hospital visits (FY 2023) and Burjeel Holdings' hospital visits.

Expanding Reach, Enhancing Care: Disciplined Execution Across Growth Pipeline

2026

1
Hospital

1
Fertility Clinic

1
Day Surgery
Center (KSA)

3
Medical
Centers

1
Day Surgery
Center

2027- 2028

1
Hospital

1
Fertility Clinic

1
Day Surgery
Center (KSA)

3
Medical Centers

3
Day Surgery
Centers

2
Radiation
Oncology
Centers (GCC)

Expected Impact
at Maturity

AED 1.5 bn
Revenue

Mid-20s
EBITDA Margin

3-5 years
Maturity

AED 1.0 bn
CAPEX



+18 New
Healthcare
Assets (2026-28)

- 7 Under Construction
- 11 Planning & Design

Note: The Group and its joint venture partner agreed to wind down the PhysioTherabia JV in Saudi Arabia, which comprised 28 centers. The Group's wholly owned physiotherapy centers in Makkah and Riyadh remain unaffected. The Group continues to evaluate the optimal model for the development of its physiotherapy operations.



Operonix: Scaling Asset-Light Growth Through Strategic O&M Partnerships



Key O&M Projects and Partners

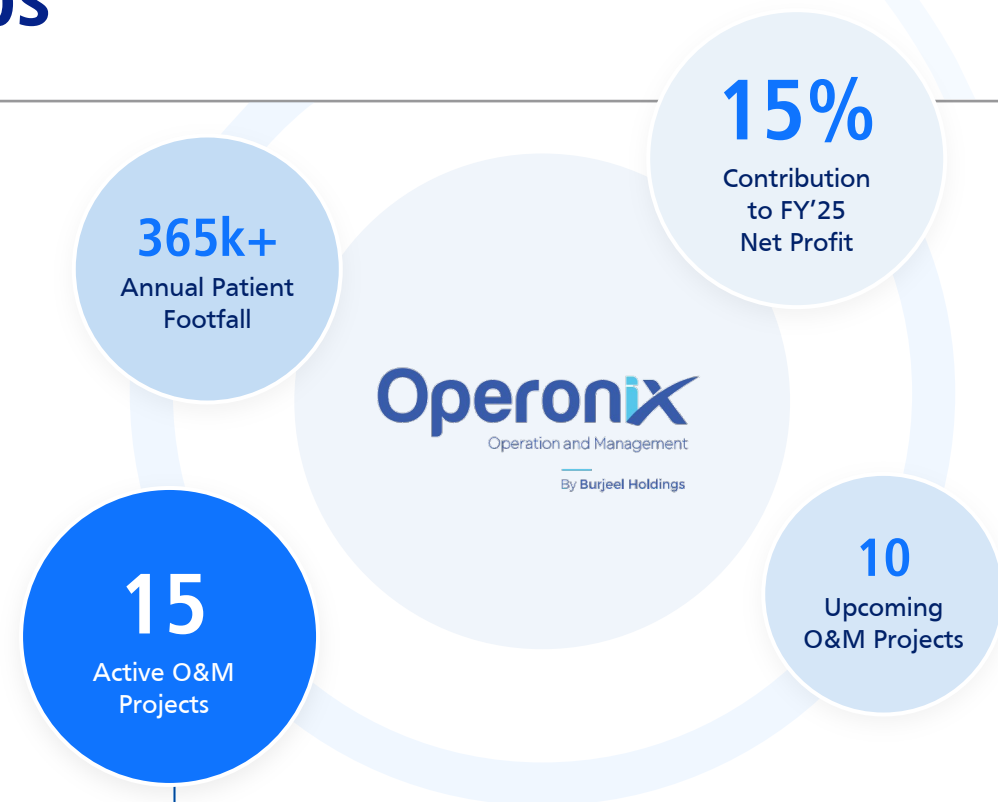


Khalifa bin Zayed Foundation
South Sudan Madol Field Hospital

Tawazun
Gaza Floating Hospital

ADNOC
Al Dhannah Hospital, Das Hospital

Abu Dhabi
Judicial Department Clinics



Digital & AI Platform: Driving Structural Efficiency, Margin Expansion & Care Excellence

Digital Core Infrastructure

- Unified EMR
- Real-time KPIs
- Standardized workflows

AI & Clinical Intelligence

- AI-assisted coding & claims
- Evidence-based decision support
- Care pathway governance

Operational Automation

- Revenue Cycle Automation
- Workflow, pharmacy & inventory
- Patient engagement tools

ORACLE
Cerner



Implementation Progress



2025
Standardization across flagship hospitals



2026
Network-wide efficiency gains



2027
Full operating leverage realization

OOH (Out of Hospital)

OP (Outpatient)

IP (Inpatient)

D/C (Discharge)

Embedded AI Across the Care Continuum

Oracle Command Center

AI-driven clinical analytics & decision support

IP/OP

Sage Care

AI-driven care navigation & triage support

OOH/OP

Sword Health

Digital physical therapy & remote MSK care

IP/OP

Proximie

AR-enabled surgical collaboration & guidance

IP/OP

Kouper Health

Post-discharge care transition support

D/C

Oracle CAA

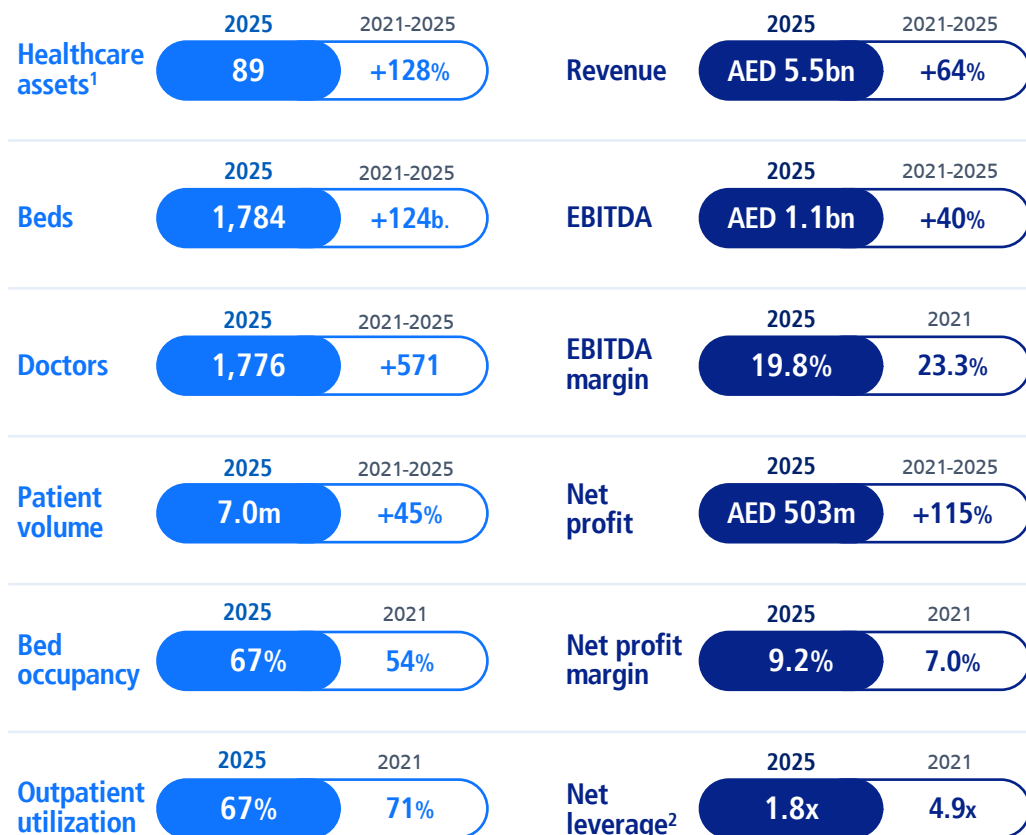
Real-time intelligence for clinical operations

IP/OP&D/C

Cash-Generative Business Model

Enabling Consistent Shareholder Return

Financial performance underpinned by operational excellence



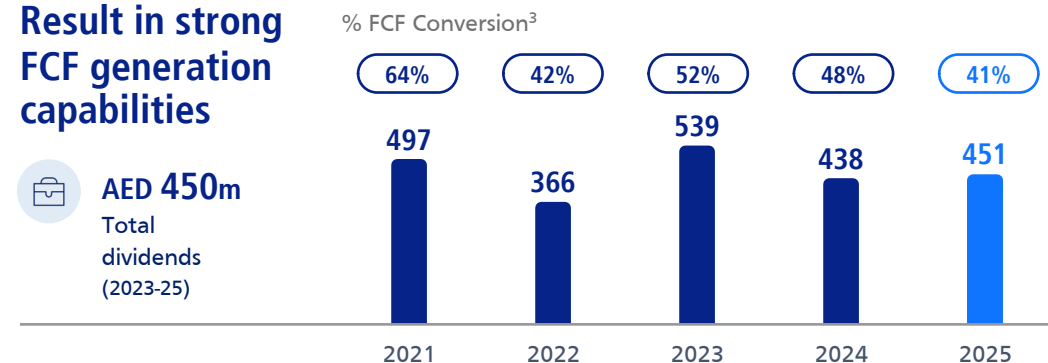
Robust margin expansion drivers

- Healthy payer-mix with proportion of Thiqa patients increasing across assets
- Significant capacity to ramp-up high growth assets (doctors and beds)
- Geographical expansion in lucrative UAE and KSA market through asset-light opportunities
- Strong focus on complex care driving ARR expansion

Compelling asset economics and strict capital discipline

Low-20s Mid-term EBITDA margin	~3 years for medical centers (maturity period)	15%-20% IRR hurdle rate	40-70% dividend pay-out ratio
>85% maturity utilization rate	4-6 years for hospitals (maturity period)	<2.5% maintenance CAPEX (of revenue)	<2.5x net debt/ EBITDA

Result in strong FCF generation capabilities



Notes: (1) Includes only hospitals, medical centers, and physiotherapy centers. (2) Net leverage represents Net debt / Pre IFRS 16 EBITDA calculated as EBITDA less Annual Lease Rental Payments and Net debt is calculated as Bank debt less Cash and Bank balance. (3) FCF = Reported EBITDA - Maintenance CAPEX - Change in Working Capital. Working Capital = Inventory + Receivables Payables (including accruals). Change in working capital calculated as working capital balance in prior period less working capital balance in current period. FCF conversion = Free cash flow / EBITDA. (see Recent Performance section).

Strong Leadership with Well-Established Market-Oriented Corporate Governance

19.7
Low Risk
As of June 2025

Rated
MORNINGSTAR | SUSTAINALYTICS



Highly experienced leadership with focus on growing shareholder value

Board of Directors



Management



Strong governance framework

- ✓ BoD of 7 Members
- ✓ 60% Board Independence
- ✓ 100% Independence Across All Mandatory Committees
- ✓ **Committees:**
 - A Audit
 - G Governance Committee
 - N Nomination & Remuneration
 - B Business Development & Sustainability

Indicative long-term-incentive plan

- ✓ **Scope:**
 - No-clinical staff (20-25 C-Level & key talents)
 - Clinical staff (20-25 administrative roles)
- ✓ Phantom stock plan with cash payment
- ✓ Maturity: 3 years
- ✓ Retention & performance-based metrics
- ✓ Grant frequency: annually

Prominent shareholder base

70.0%
VPS Healthcare Holdings

5.0%
SYA Holdings

14.4%
Quant Lase Lab (IHC)

10.6%
Free float (ADX)

Strategic Pillars – ESG Framework

19.7
Low Risk
As of June 2025

Rated
MOHAWID STAR | SUSTAINALYTICS



Healthy System

Diversity Equity & Inclusion

- 1 Increase the representation of **women in leadership roles¹** to **30%** or higher by 2030
- 2 Sustain a balanced workforce by maintaining a **50:50 gender balance** by 2030

Employee Health, Safety & Wellbeing

- 3 Train **100% of active employees** on health and safety standards by 2025

Human Capital Development

- 4 Achieve an employee **satisfaction score of 95%** in the annual employee engagement survey by 2026
- 5 To achieve a **reduction in turnover rate by 15%** by 2026

Responsible Supply Chain

- 6 Ensure **100% compliance of suppliers** with **ethical labour practices** through regular audit by 2026

Product Safety & Quality

- 7 Ensure **100% of hospitals** are permanently accredited by internationally recognized standards

Healthy Community

Community Engagement

- 1 To touch **>7 million lives** per year by 2026
- 2 Encourage **30% of corporate employees** to participate in at least one community volunteer activity each year from 2025

Access to Healthcare

- 3 Implement **patient education programs** for **70% of active patients** with chronic conditions by 2026

Patient Care & Safety

- 4 Conduct regular **patient satisfaction surveys** to ensure **patient satisfaction rate²** of **>85%** or higher
- 5 Ensure **100% of active healthcare staff³** complete patient safety training annually by 2026

Healthy Governance

Corporate Governance

- 1 Maintain a **high percentage of independent directors** on the board (**>50%**)

Business Ethics & Compliance

- 2 Ensure **100% completion of ethics and compliance training** for all active employees by 2026

Data Privacy & Security

- 3 Ensure **100% of active employees** to complete data privacy and security training annually by 2026
- 4 Ensure **100% of hospitals in Abu Dhabi** are ADHICS⁴ accredited and achieve **100% of remaining hospitals** becoming ISO 27001 certified by 2027

Healthy Environment

GHG Emissions & Carbon Neutrality

- 1 Achieve **carbon neutrality** by 2040
- 2 Develop **mid-term targets** for a reduction in combined Scope 1 and 2 GHG emissions by 2025

Waste

- 3 To achieve **zero waste to landfill** by 2040

Water

- 4 Reduce **10% of water consumption** by 2030 and ensure that **5% of total water consumed** will be reused each year

Notes: (1) The leadership team includes key corporate employees and doctors. (2) Based on the Abu Dhabi Department of Health assessment for inpatient experience survey across Burjeel hospitals. (3) Based only on doctors and nurses dealing with patients. (4) Abu Dhabi Healthcare Information and Cyber Security Standard.



FY 2025 ESG Highlights

19.7
Low Risk
As of June 2025

Rated
MORNINGSTAR | SUSTAINALYTICS



Healthy System

95%

Employee satisfaction score

57%

Women in employees

100%

Hospitals accredited by internationally recognized standards

100%

Employees completed health and safety training



Healthy Community

87%

Inpatient satisfaction score

100%

Healthcare staff completed patient safety training

31%

Corporate employees participated in community volunteer activities

60%

Patients with chronic conditions received training



Healthy Governance

Zero

Data breaches, corruption or bribery and whistleblowing cases

4 of 7

Independent Directors

100%

Employees completed data privacy and security training

100%

Employees completed ethics & compliance training



Healthy Environment

+2%

Electricity Consumption

-10%

Water Consumption

40%

Waste recycled or incinerated

6%

Water consumption reused



04



Recent Performance

Leading Super-Specialty Healthcare Provider in the Gulf

H1'26 Results: Resilient Growth. Emerging Stronger.

Key Highlights

Revenue

AED 2,794m
+4.4% YoY

EBITDA (ex-one-offs)

AED 517m
+24.6% YoY

Net profit (ex-one-offs)

AED 227m
+97.4% YoY

Operating Cash Flow

AED 405m
+76.8% YoY

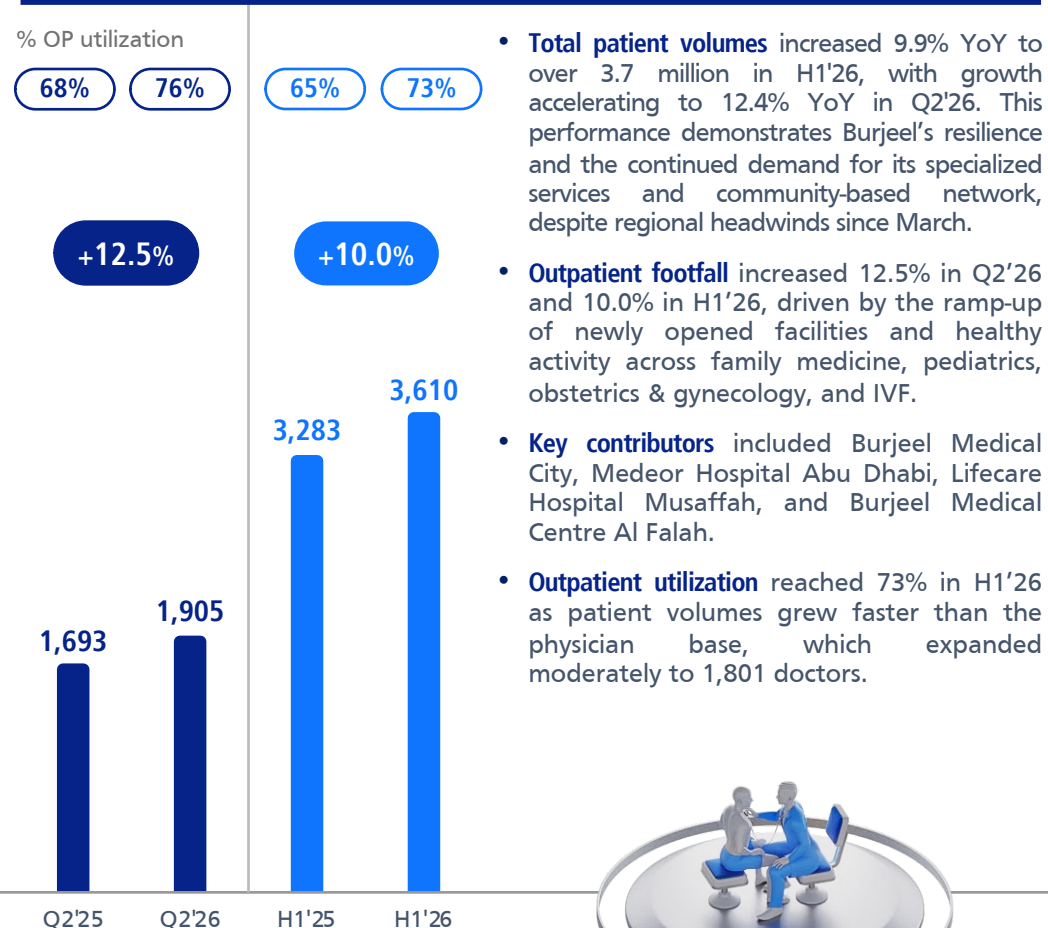
Defensive & Resilient Healthcare Platform



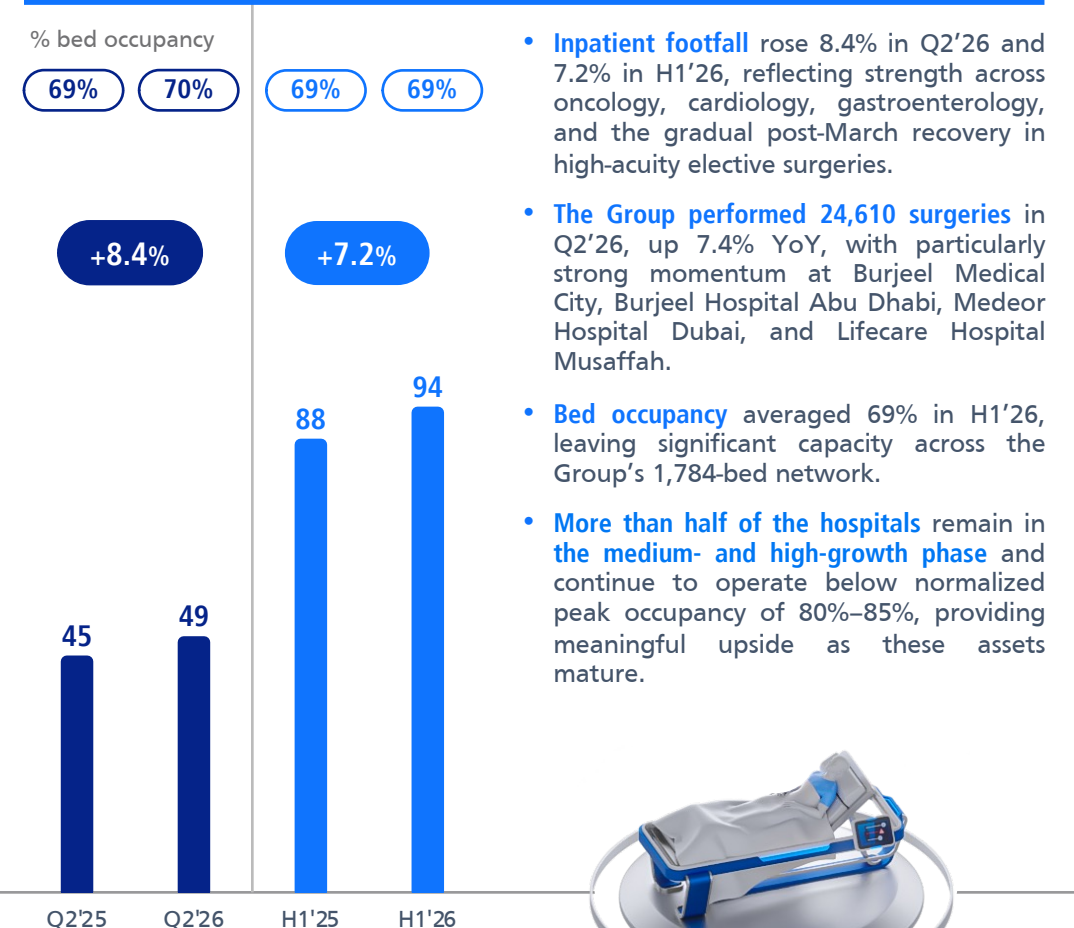
- **All facilities** operating without disruption
- **Diversified** multi-brand platform
- ~85% **revenue** from Abu Dhabi with stable population base
- **100% insured** healthcare system in the UAE
- ~85% **of revenue** from insured payers
- **Essential and non-deferred** care drives demand
- **Delivered robust growth in H1'26** despite regional dynamics
- **2025 delivered strong performance** despite insurer restrictions
- **2020 COVID:** stable demand, rapid recovery
- **Network is well-invested** and largely built
- **>60% of hospitals in growth phase**, driving margin upside
- **Net leverage at 1.8x**, enabling selective expansion

Accelerating Patient Volume Growth with Expanding Market Presence

Group Outpatient Footfall, k

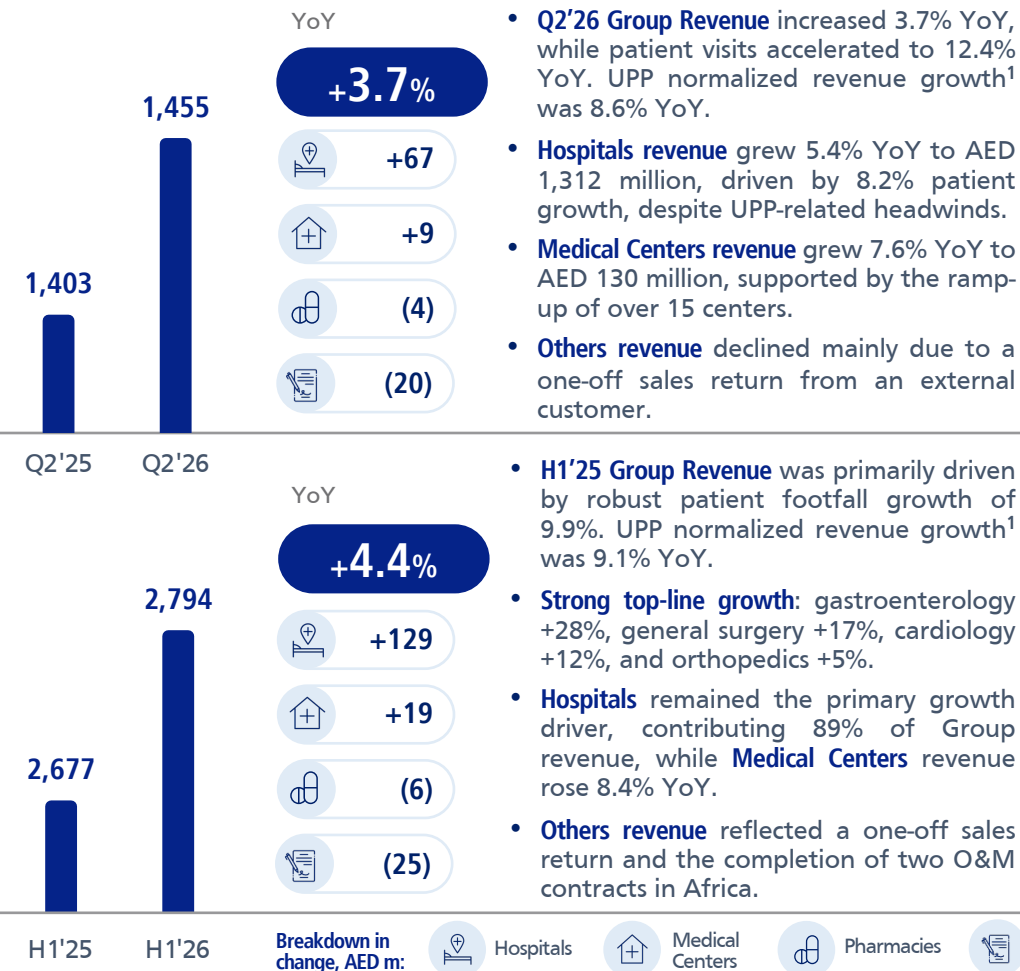


Group Inpatient Footfall, k

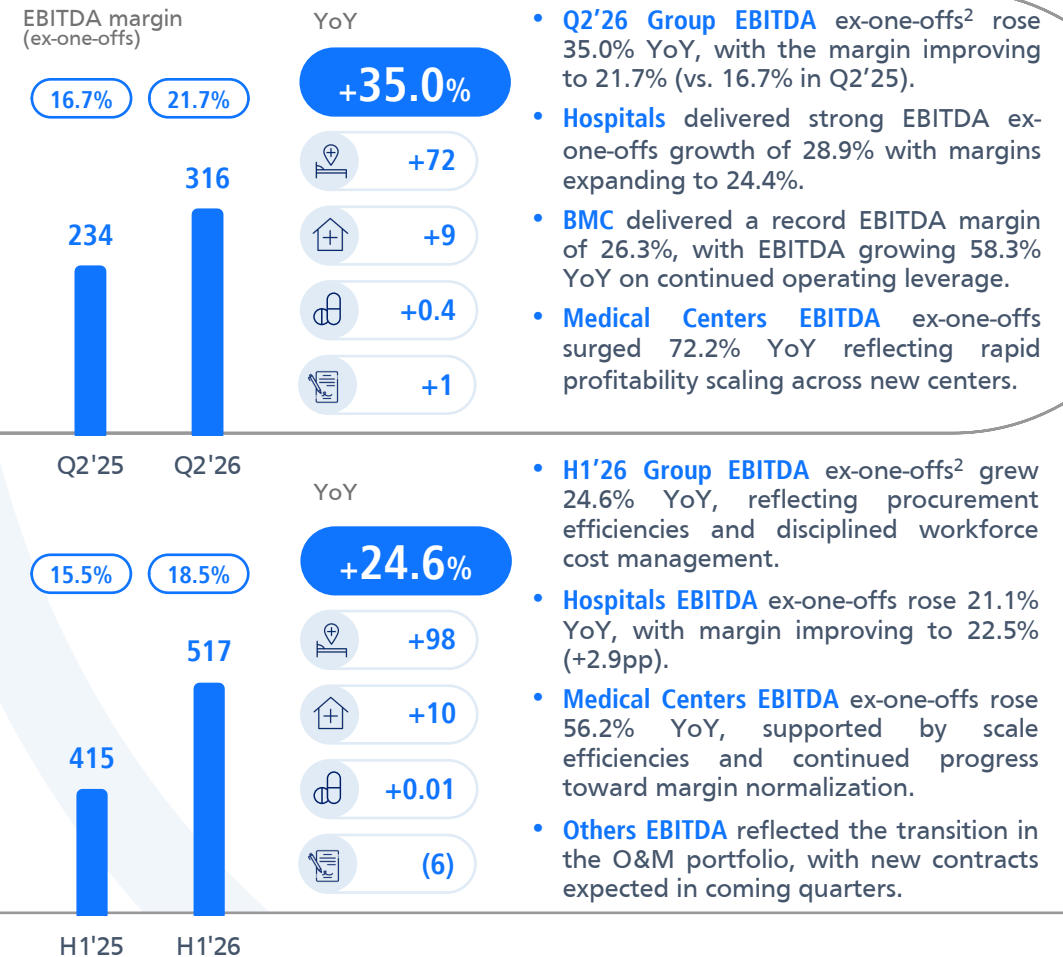


Delivered Strong Underlying Performance Despite Challenging Market Headwinds

Group Revenue, AED m



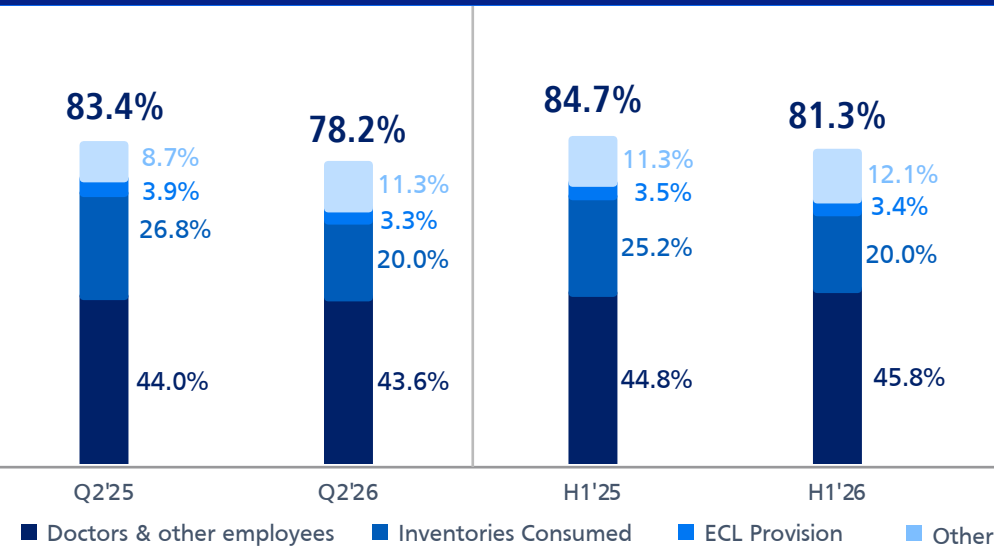
Group EBITDA, AED m



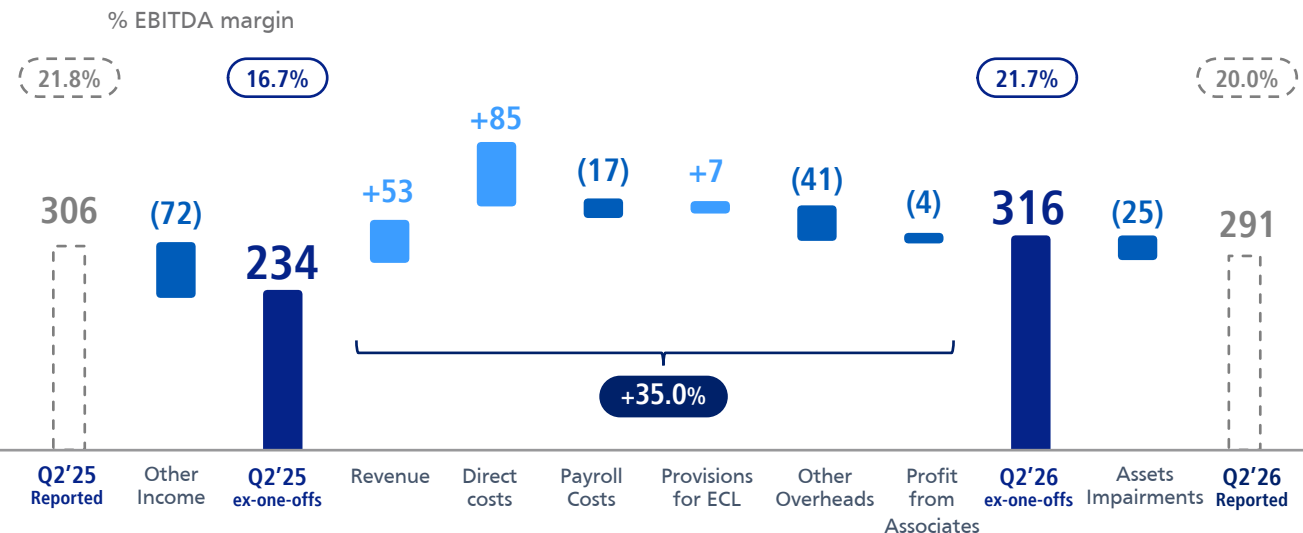
Notes: (1) In August 2025, the Department of Health – Abu Dhabi introduced the Unified Procurement Program (UPP), under which certain prescribed medicines are procured directly by the authorities, with the Group earning a fixed service fee instead of recording the full revenue, resulting in lower revenue per patient. (2) Ex-one-offs definitions: see slide 45.

Margin Normalization Progressing Through Asset Maturity & Cost Discipline

Group OPEX Breakdown, % of Revenue



Group EBITDA Analysis, AED m



- **Employees' salaries** as a share of revenue decreased by 0.4 p.p. YoY in Q2'26, despite more than 350 employee additions over the past 12 months, including 25 new doctors since the beginning of the year, reflecting disciplined workforce scaling and continued cost control.
- **Inventory costs** as a share of revenue declined by 6.8 p.p. YoY in Q2'26, reflecting tighter procurement controls, optimized vendor agreements, lower consumable intensity, and the net-basis recognition of certain pharmaceutical revenues under the Unified Procurement Program (UPP).
- **Expected credit loss provisions** declined to 3.3% of revenue in Q2'26 from 3.9% in Q2'25, primarily reflecting the reclassification of provisions relating to Burjeel Hospital for Advanced Surgery in Dubai to asset impairment costs. Provisioning is expected to remain broadly stable around the H1'26 level of 3.5%.

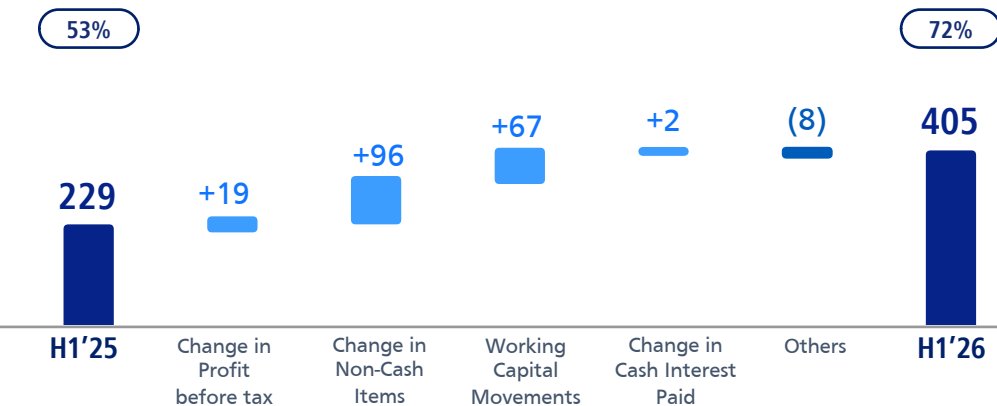
- **Other overhead expenses** as a share of revenue grew by 0.8 p.p. in H1'26. In Q2'26, the ratio declined by 1.8 p.p. versus Q1'26, while increasing by 2.5 p.p. YoY due to a low comparison base and continued investments in digital infrastructure, AI integration, and medical equipment support.
- **Q2'26 EBITDA ex-one-offs** increased 35.0% YoY, with the EBITDA margin expanding to 21.7% from 16.7%, reflecting procurement efficiencies, disciplined workforce management, and operating leverage from ramped-up assets.
- **Net profit ex-one-offs** increased by 124.7% YoY to AED 171 million in Q2'26 and by 97.4% YoY to AED 227 million in H1'26, with the Q2 net margin improving to 11.7% from 5.4% in Q2'25. This reflects strong operating performance and disciplined control of non-operating costs.

Notes: Q2'26 reported EBITDA included AED 25 million of net non-recurring costs related to Saudi physiotherapy optimization and the planned relocation of Burjeel Hospital for Advanced Surgery in Dubai, partly offset by lease-liability derecognition. Q2'25 included an AED 72 million non-recurring gain following the Medeor Hospital Dubai building acquisition.

Strong Free Cash Flow Generation Along With Disciplined Capital Deployment

Net Cash from Operating Activities, AED m

% FCF conversion¹

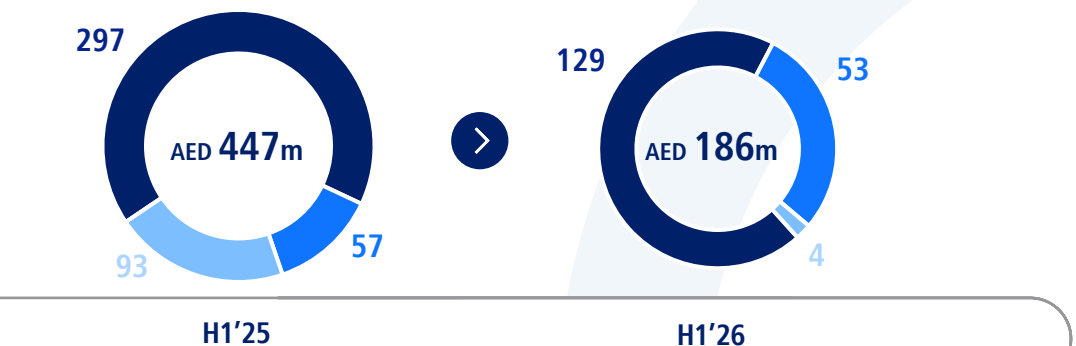


AED, m	2023	2024	2025	H1'25	H1'26
EBITDA	1,033	908	1,089	487	493
Change in Net Working Capital	(382)	(343)	(506)	(170)	(84)
Maintenance CAPEX	(113)	(127)	(136)	(57)	(53)
Free Cash Flow¹	539	438	447	259	356

Notes: (1) FCF = Reported EBITDA – maintenance CAPEX – change in working capital. Working capital = inventory + receivables – payables (incl. accruals). Change in working capital is calculated as working capital balance in prior period less working capital balance in current period.

Net Cash Used In Investing Activities, AED m

■ Growth CAPEX ■ Maintenance CAPEX ■ Net acquisitions and investments in associates



- **Operating cash flow** increased 76.8% YoY to AED 405 million in H1'26, driven by stronger operating profit and lower working capital outflows. The improvement primarily reflected lower outflow from accounts receivable and prepayments compared with H1'25, partially offset by lower inflow from accounts payable and accruals.
- **Investing cash outflows** decreased 58.5% YoY to AED 186 million in H1'26, reflecting lower capital deployment. This included AED 129 million in growth CAPEX, AED 53 million in maintenance CAPEX, and AED 4 million in net acquisitions and investments in associates
- **Financing cash outflows** totaled AED 272 million, primarily reflecting net debt repayments, lease-related payments, and dividend distributions.
- **Free cash flow (FCF) conversion** reached 72% in H1'26, with free cash flow increasing 37.3% YoY to AED 356 million. Return on capital employed increased to 13.6% from 12.4% in H1'25 and remains on track to exceed 15%.

Well-Capitalized Balance Sheet Enhanced by Successful Debt Refinancing

AED m	30 June 2026	31 December 2025
Bank balances and cash	224	277
Interest-bearing loans and borrowings	1,877	1,918
Bank overdraft	–	–
Bank debt¹	1,877	1,918
Net debt	1,653	1,641
Lease liabilities ²	1,165	1,191
Net debt including lease liabilities³	2,818	2,832
Net amounts due from/(to) related parties	(40)	(24)
KPIs:		
Net debt / pre-IFRS 16 EBITDA⁴	2.6x	2.6x
Net debt including lease liabilities / EBITDA	1.8x	1.8x
Total Group equity	2,225	2,165
Divided mainly into:		
Share capital	521	521
Share premium	367	367
Retained earnings (incl. NCI)	1,331	1,271

Debt Maturity as of 31 July 2026



Commitment to Conservative Financial Policy

- **Net leverage remained stable at 1.8x** as of 30 June 2026, reflecting strong cash generation despite continued investment in growth. The Group had no contingent off-balance-sheet liabilities.
- **USD 500 million Sukuk completed** on 1 July 2026 under the USD 1.5 billion Sukuk Programme. The senior unsecured Regulation S Sukuk due 2031 carries a 7.000% profit rate and was issued at a 7.125% yield, with proceeds used primarily to refinance existing debt.
- **Debt successfully refinanced following the Sukuk issuance**, with AED 1,598 million of term loan facilities fully repaid and the FAB RCF reduced by AED 209 million. The remaining AED 78 million balance is expected to be repaid from internal cash flows.
- **Outstanding debt totaled AED 1,915 million as of 31 July 2026**, comprising AED 1,837 million under the Sukuk and AED 78 million drawn under the FAB RCF, with AED 672 million of undrawn committed capacity available.
- **Balance sheet remained well capitalized**, with total equity increasing to AED 2,225 million as of 30 June 2026.

Notes: (1) Includes interest-bearing loans and borrowings and bank overdrafts. (2) Includes current and non-current portion of lease liabilities. (3) Includes net debt and lease liabilities. (4) Pre-IFRS 16 EBITDA is calculated as reported EBITDA less annual lease rental, and net debt is calculated as bank debt less cash and bank balances.

05



Guidance

Leading Super-Specialty Healthcare Provider in the Gulf

Mid-Term Outlook & Guidance



Network Expansion



18 Healthcare Assets: 2 Hospitals – Dubai, 4 Day Surgery Centers – UAE, 6 Medical Centers – UAE, 2 Fertility Clinics – Al Ain and Dubai, 2 Day Surgery Centers – KSA, and 2 Radiation Oncology Centers – GCC.



Profitability



Group EBITDA margin expected to expand to **the low-20s range on a blended basis**, driven by asset ramp-up, scale benefits, and patient yield optimization.



Top-Line Growth



Group revenue expected to grow at **a low double-digit CAGR**.



BMC revenue targeted to reach **AED 1.7 billion** p.a.



Expansion projects expected to generate **AED 1.5 billion** p.a.



Capital Allocation & Leverage



Maintenance CAPEX expected to be up to **2.5%** of revenue. Growth CAPEX of **AED 1.0bn** for UAE & KSA expansion and digital transformation.



Net debt / pre-IFRS 16 EBITDA of **less than 2.5x** to be maintained.



Dividend payout ratio of **40%–70%** of net income, subject to funding requirements for growth opportunities.

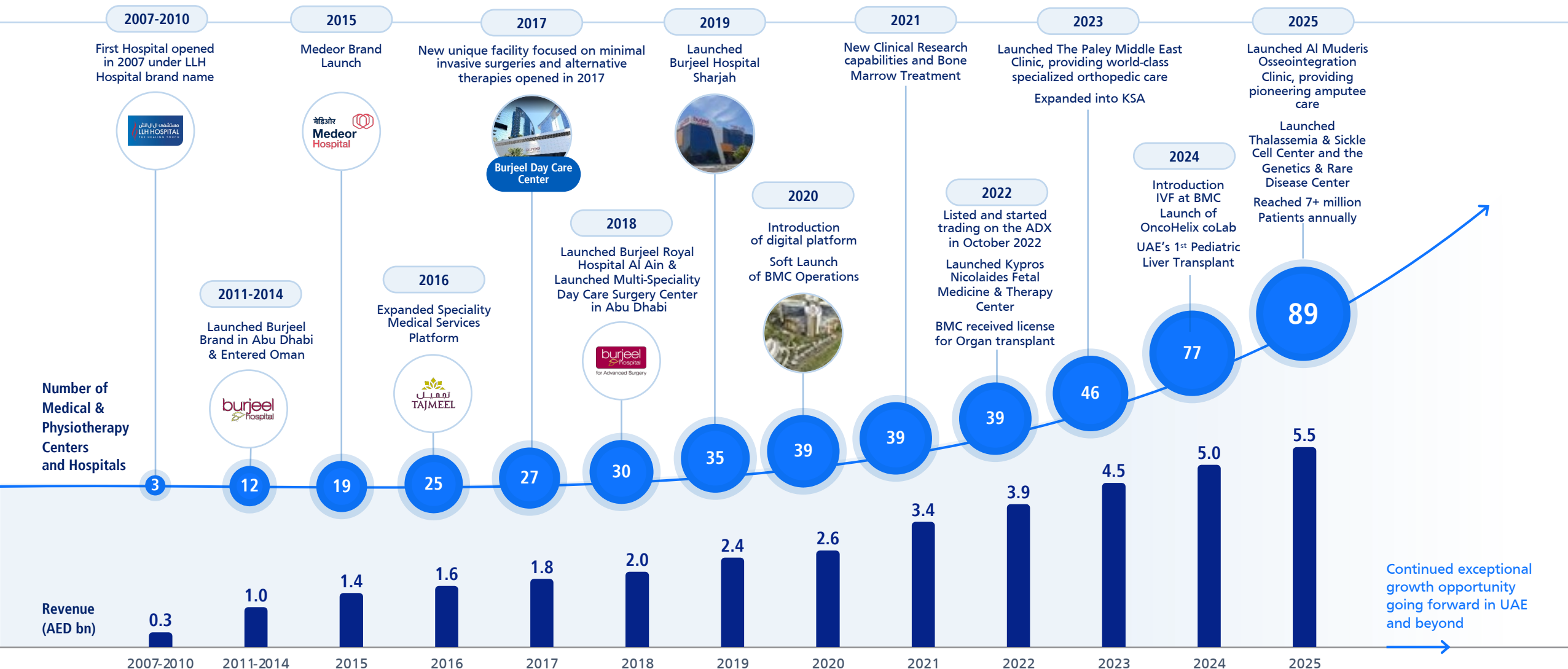
06



Appendix

Leading Super-Specialty Healthcare Provider in the Gulf

A Proven Track Record of Scale and Leadership



Note: Noted: Revenue figures from 2019-2025 inclusively are based on the Burjeel Group consolidated financial statements, while those prior to 2019 come from the management accounts.

Transforming Cancer Care: The UAE's Leading National Network

Burjeel Cancer Institute (Burjeel Medical City)

Pathology, AI & Molecular Diagnostics

Medical Oncology (HIPEC)

Surgical Oncology (Da Vinci, SRS)

Radiation Therapy (MR-linac, SBRT)

Nuclear Medicine (PET & SPECT)

Bone Marrow Transplant

Immunotherapy

Supportive & Palliative Care

Diversified Referral Pathways Strengthening Oncology Access

Hub for high-end specialized oncology treatments

Planned Standalone Radiation Oncology Network

- Built on Acquired Advanced Care Oncology Center
- Specialized Hubs for Radiation & Medical Therapy
- AI-Driven Radiation Planning & LINAC Systems
- Streamlined Referrals from Healthcare Providers

Hospital & Medical Center Network

- 20 Hospitals & 40 Medical Centers across UAE & Oman
- Comprehensive Care from Primary to Quaternary
- Initial Oncology Care & Diagnostics
- Seamless Patient Flow for Specialized Treatments



Clinical Governance & Research

Cancer MDT & Clinical Guidelines

Oncology Drug Formulary

Translational Research & Clinical Trials

Education Programs & Fellowship

Strategic Global Alignments

ESMO & Novalis Accreditations

Trust Fertility Center: Powering UAE's Fertility Strategy with Rapid Ramp-Up

Integral in Burjeel's
Women's Health Platform

Operational Since
Dec 2024

Capacity
5,000 IVF cycles/year

Net Profit Breakeven
Within 6 Months of Launch

FY 2025 Ramp-Up
Mid-Teens EBITDA Margin
at only 35% Utilization



2025

AED 58m
Total
Revenue

3,000+
Unique Patient
Volumes

1,900+
IVF, FET, & IUI
Cycles Initiated

~50%
Clinical Pregnancy Rate
(above global average)

Advanced IVF & Fertility Solutions

- Egg Retrieval
- AI-Driven Embryo Selection & AI-Assisted Sperm Selection
- Embryo Transfer
- Fertility Assessments
- Intrauterine Insemination (IUI)
- Ovarian Tissue Cryopreservation (OTC) for Oncology Patients
- Social Egg Freezing
- IVF Consultations
- Reproductive Medicine Consultations
- Laparoscopic Surgery
- Advanced Cryopreservation Storage System

Growth & Integration Priorities

Next Launch

Al Ain IVF Center
(2026)
Dubai IVF Center
(2027)

Strengthening Referrals

from BMC (Ob-Gyn,
Endocrinology)

Preparing for Center of Excellence

(CoE) Designation
in 2026

Expanding Collaboration

with Oncology,
Urology, and Genetics

Continuous Staff Development

& Academic
Leadership

GCC Healthcare Market Growth Drivers

1 Strong economic growth

CAGR '23-31E of GDP¹

+5%

UAE

+3%

Oman

+3%

KSA

2 Under-penetration of healthcare expenditure vs developed countries

Healthcare expenditure as % of GDP²

5%

GCC

11%

UK

17%

USA

3 Favorable demographic trends

+2% CAGR '24-29E

65.1m

GCC population² (2029E)

+32% CAGR '24-29E

14%

Share of GCC people aged over 50² (2029E)

4 High prevalence of non-communicable diseases

40%

Prevalence of **high blood pressure** in adults of the total GCC population²

24%

Prevalence of **obesity** in adults within the total GCC population²

79%

NCD-related **mortality rate** of the total GCC deaths²

5 Increasing demand for specialized and complex care

- **Specialized tertiary care services** in the private sector are a key area of growth
- High demand for **preventive wellness and care**

6 Roll-out of mandatory health insurance coverage

- **Implementation of mandatory health insurance schemes** leading to an increase in % of insured population / greater service utilisation

7 Rising Oncology Demand

~42,500

New cancer cases recorded in GCC (2020)

~103,000

New cancer cases projected by 2040 (+143%)

8 Telemedicine / digitalisation of services

- Operators expected to further **invest in digital technology / data solutions** after witnessing its value during the pandemic
- **EMR / EHR** widely acted in GCC as a centralized system for digitization and distribution of medical records

9 Private operators gaining share from public sector

- **Initiatives to boost private sector** participation (e.g. PPP initiatives / liberalisation of foreign investment policies)
- The Saudi government aims to **increase private sector contribution** from 40% to 65% by 2030

H1'26

Income Statement

Group Income Statement Summary

AED m	Q2'26	Q2'25	H1'26	H1'25
Revenue	1,455	1,403	2,794	2,677
Inventories consumed	(290)	(375)	(559)	(674)
Doctors' & other employees' salaries	(635)	(617)	(1,279)	(1,199)
Provision for expected credit losses	(48)	(55)	(95)	(94)
Other general and admin expenses	(164)	(123)	(339)	(302)
Share of profit from associates	(2)	2	(5)	7
EBITDA ex-one-offs¹	316	234	517	415
Impairment of Assets ²	(29)	—	(29)	—
Other Income ³	4	72	4	72
EBITDA	291	306	493	487
Finance costs	(31)	(43)	(70)	(84)
Depreciation & amortization	(98)	(99)	(195)	(195)
Income tax	(16)	(16)	(25)	(21)
Net profit ex-one-offs¹	171	76	227	115
Net profit	146	148	202	187

Financial Performance by Segment

AED m	Q2'26	Q2'25	H1'26	H1'25
Revenue	1,455	1,403	2,794	2,677
Hospitals ⁴	1,312	1,245	2,501	2,371
Medical Centers ⁴	130	121	248	229
Pharmacies ⁴	14	18	27	33
Others ⁵	(1)	19	18	43
EBITDA (ex-one-offs)	316	234	517	415
Hospitals	320	249	562	464
Medical Centers	22	13	28	18
Pharmacies	2	2	3	3
Others ⁶	(28)	(29)	(76)	(70)
Net profit (ex-one-offs)	171	76	227	115
Hospitals	200	110	324	197
Medical Centers	10	2	5	(3)
Pharmacies	2	1	2	2
Others	(41)	(38)	(103)	(81)

Notes: EBITDA is calculated as profit for the period before income tax expense, finance costs, depreciation and amortization. (1) EBITDA ex-one-offs excludes the non-recurring items, while net profit ex-one-offs excludes their after-tax impact, as described in Notes (2) and (3). (2) Represents non-recurring impairment charges recognized in Q2'26 relating to (i) the Group's PhysioTherabia business following the decision to wind down the joint venture operations in Saudi Arabia and (ii) the planned relocation of Burjeel Hospital for Advanced Surgery in Dubai to a new facility, expected to be completed by the end of Q4'26. (3) Q2'25 represents a non-recurring gain of AED 72 million recognized following completion of the Medeor Hospital Dubai building acquisition, primarily reflecting the derecognition of lease liabilities under IFRS 16. Q2'26 includes a non-recurring gain associated with the planned relocation of Burjeel Hospital for Advanced Surgery in Dubai, primarily reflecting the derecognition of lease liabilities under IFRS 16. (4) Includes other operating income and other revenue represents the non-clinical revenue in the Hospitals, Medical Centers and Pharmacies segments which mainly include an O&M fee, a fee for manpower supply contracts, and several other items. (5) Others contains revenue from entities that mainly provide services to the Group's hospitals, medical centers and pharmacies and also includes centralized purchasing, claim care and valet parking. (6) The Others segment includes corporate expenses.

FY'25

Income Statement

Group Income Statement Summary

AED m	FY'25	FY'24
Revenue	5,486	5,010
Inventories consumed	(1,261)	(1,246)
Doctors' and other employees' salaries	(2,403)	(2,182)
Provision for expected credit losses	(179)	(103)
Other general and admin expenses	(625)	(578)
Share of profit from associates	(3)	17
Change in financial assets carried at fair value through profit and loss	—	(10)
Other Income ¹	73	—
EBITDA	1,089	908
Finance costs	(162)	(149)
Depreciation & amortization	(386)	(360)
Income tax ²	(38)	(39)
Net profit	503	360

Financial Performance by Segment

AED m	FY'25	FY'24
Revenue	5,486	5,010
Hospitals ²	4,840	4,521
Medical Centers ²	468	374
Pharmacies ²	64	64
Others ⁴	114	51
EBITDA	1,089	908
Hospitals	1,165	988
Medical Centers ⁵	50	60
Pharmacies	7	6
Others ⁶	(134)	(147)
Net profit	503	360
Hospitals	667	482
Medical Centers	2	26
Pharmacies	6	5
Others	(171)	(153)

Notes: Figures reflect reported EBITDA and net profit. (1) Includes AED 72 million gain from asset optimization following the Dubai Medeor Hospital building acquisition, completed in June 2025, reflecting lease liability de-recognition. (2) In FY'25, the Group recognized deferred tax assets of AED 18.9 million relating to carried-forward tax losses at the Oman legal entity level. (3) Includes other operating income and other revenue represents the non-clinical revenue in the Hospitals, Medical Centers and Pharmacies segments which mainly include an O&M fee, a fee for manpower supply contracts, and several other items. (4) Others contains revenue from entities that mainly provide services to the Group's hospitals, medical centers and pharmacies and also includes centralized purchasing, claim care and valet parking. (5) Affected by the ramp-up of recently opened facilities in the UAE and KSA. (6) The Others segment includes head office and corporate expenses.

H1'26 & FY'25

Balance Sheet

Balance Sheet Summary

AED m	30 June 2026	31 Dec 2025
Non-current assets		
Property and equipment	2,081	2,133
Intangible assets	17	20
Right-of-use assets	1,027	1,061
Capital work in progress	334	233
Goodwill	86	86
Investments in associates	32	33
Term deposits	3	3
Deferred Tax	18	18
Subtotal	3,596	3,587
Current assets		
Bank balances and cash	224	277
Accounts receivable and prepayments	2,674	2,490
Inventories	303	288
Amounts due from related parties	15	15
Subtotal	3,216	3,070
Total assets	6,812	6,657

AED m	30 June 2026	31 Dec 2025
Shareholders' equity		
Share capital	521	521
Shareholder's contribution	4	4
Other reserves	3	3
Share premium	367	367
Retained earnings	1,275	1,203
Non-controlling interests	56	68
Total equity	2,225	2,165
Liabilities		
Non-current liabilities		
Interest-bearing loans and borrowings	1,428	1,489
Lease liabilities	1,051	1,068
Employees' end-of-service benefits	205	198
Subtotal	2,683	2,755
Current liabilities		
Interest-bearing loans and borrowings	449	429
Accounts payable and accruals	1,204	1,089
Income tax payable	81	57
Amounts due to related parties	55	39
Lease liabilities	114	123
Subtotal	1,903	1,737
Total liabilities and owner equity	6,812	6,657

H1'26

Cash Flow Statement

Cash Flow Summary

AED, m	H1'26	H1'25
Operating activities		
Net Profit for the Period Before Tax	227	208
Non-cash movements	419	323
Working capital movements	(175)	(242)
Other	(66)	(60)
Net Cash, Operating activities	405	229
Investing activities		
CAPEX (property, equipment, CWIP, intangibles)	(182)	(354)
Acquisitions & investment in associate	(9)	(106)
Proceeds & income from investments	5	13
Net Cash, Investing activities	(186)	(447)
Financing activities		
Net movement in borrowings & derivative settlements	(41)	416
Lease liability payments and related interest	(88)	(96)
Dividends paid (including to NCI holders)	(142)	(185)
Net Cash, Financing activities	(272)	135
Cash & Cash Equivalents, End of Period	224	151

FY'25

Cash Flow Statement

Cash Flow Summary

AED, m	FY'25	FY'24
Operating activities		
Net Profit for the Period Before Tax	541	399
Non-cash adjustments	711	630
Working capital adjustments	(677)	(415)
Other	(173)	(114)
Net Cash, Operating activities	402	500
Investing activities		
CAPEX (property, equipment, CWIP, intangibles)	(585)	(255)
Acquisitions & investment in associate	(131)	—
Proceeds & income from investments	19	43
Net Cash, Investing activities	(697)	(212)
Financing activities		
Net movement in borrowings & derivative settlements	707	26
Lease liability payments and related interest	(185)	(170)
Dividends paid (including to NCI holders)	(185)	(75)
Net Cash, Financing activities	337	(219)
Cash & Cash Equivalents, End of Period	277	234

IR Contacts

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Sergei Levitskii

Director of Investor Relations

✉ sergei.levitskii@burjeelholdings.com

✉ ir@burjeelholdings.com

T: +971 2 3041 111

F: +971 2 2222 363

M: +971 503802383

PO Box 7400, Abu Dhabi, UAE



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[Company Website](#)

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