



# Solaris Energy Infrastructure, Inc. Investor Presentation

May 2025



**SEI**  
LISTED  
NYSE



# Solaris Energy Infrastructure, Inc.

**NYSE: SEI; ~\$1.5 Billion Market Capitalization, ~\$2.0 Billion Enterprise Value <sup>(1)</sup>**

Provides power-as-a-service to multiple end markets with scalable equipment-based solutions for behind-the-meter generation; also provides raw material handling services for the energy industry using in-house designed and manufactured all-electric equipment.

## Business Segments



### Power Solutions

*Provides mobile and/or modular power generation services to customers based on medium- to long-term contracts*

## Illustrative Target Adj. EBITDA Contribution

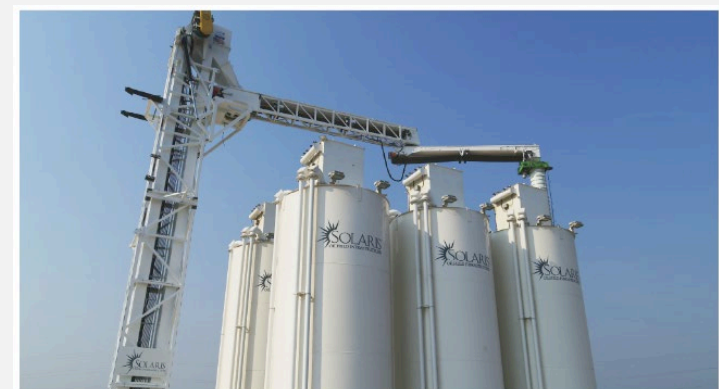


## Potential End Markets

- Hyperscalers/ Data Centers
- Utilities
- Mining
- Microgrid
- Manufacturing
- Refinery & Chemical Processing
- Energy – Upstream, Midstream, Downstream

## Business Characteristics

- Expected to grow to 1.7 GW by 1H 2027 from 390 MW in Q1 2025
- ~71% of pro forma fleet (current + on order) contracted
- Rapidly growing end markets create opportunities to enhance scale and breadth of offering



### Logistics Solutions

*Facilitates critical raw materials for oil and gas customers using in-house designed and manufactured all-electric equipment*

**Logistics Solutions <20%**

Energy – Upstream

- Mature end market
- Established market leader
- Low maintenance capital requirements drive significant Free Cash Flow

## Recent Business Updates



**Reported In-line Q1 2025 Results, Maintained Q2 Adjusted EBITDA Guidance, Initiated Q3 Guidance Above Street <sup>(1)</sup>**



**Upsized and Signed Joint Venture (“JV”) with a Key Customer:**

- Established JV with a key data center customer to own 50.1% of approximately 900 MW (vs. prior announcement of 500 MW) of power generation and related emissions controls equipment



**Upsized and Extended Commercial Contract to Support the JV:**

- Commercial contract for a ~900 MW (vs. prior announcement of 500 MW) for an initial term of seven years (vs. prior announcement of six years) supporting a new data center



**Additional Orders for 330 MW to Grow Fleet to ~1.7 GW by 2H 2027:**

- Effectively sold out of larger capacity generation following upsizing of JV and commercial contract and ordered additional 330 MW of 16.5 MW turbines for delivery in 2H 2026
- Total pro forma 1.7 GW fleet is now ~71% contracted; actively bidding remaining ~500 MW with customers



**Completed Financing for Current Growth Plans:**

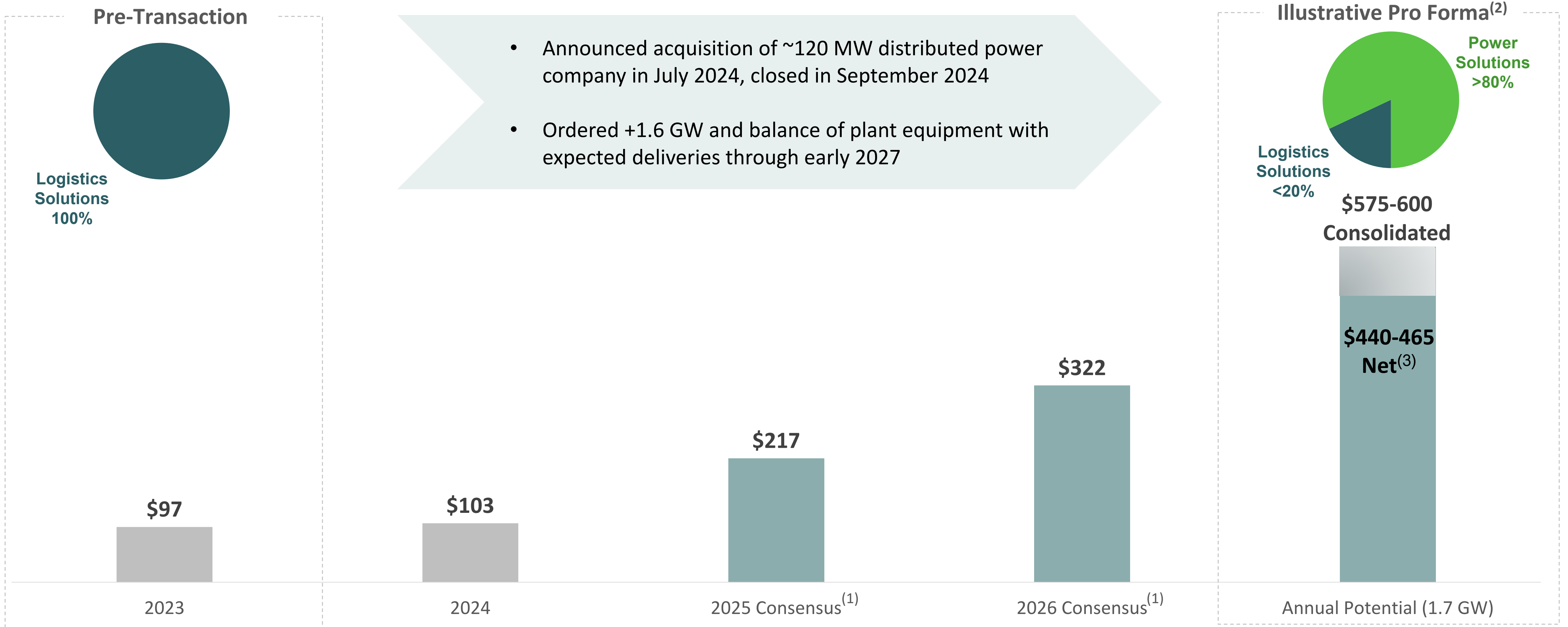
- Closed \$155 million convertible note offering
- Finalized senior secured loan for up to \$550 million of debt to support capital needs of the JV

1) See appendix for details on guidance. Adjusted EBITDA is a Non-GAAP financial metric. Due to the forward-looking nature, we cannot provide a reconciliation to the nearest GAAP metric without unreasonable effort.

# Solaris Earnings Undergoing a **Significant Transformation**

Driven by recent power solutions acquisition and associated growth capital plans

Illustrative Annual Adjusted EBITDA Contribution Pro Forma for Power Fleet Equipment Deliveries (\$ Millions)



(1) Reflects Bloomberg consensus as of 5/13/2025

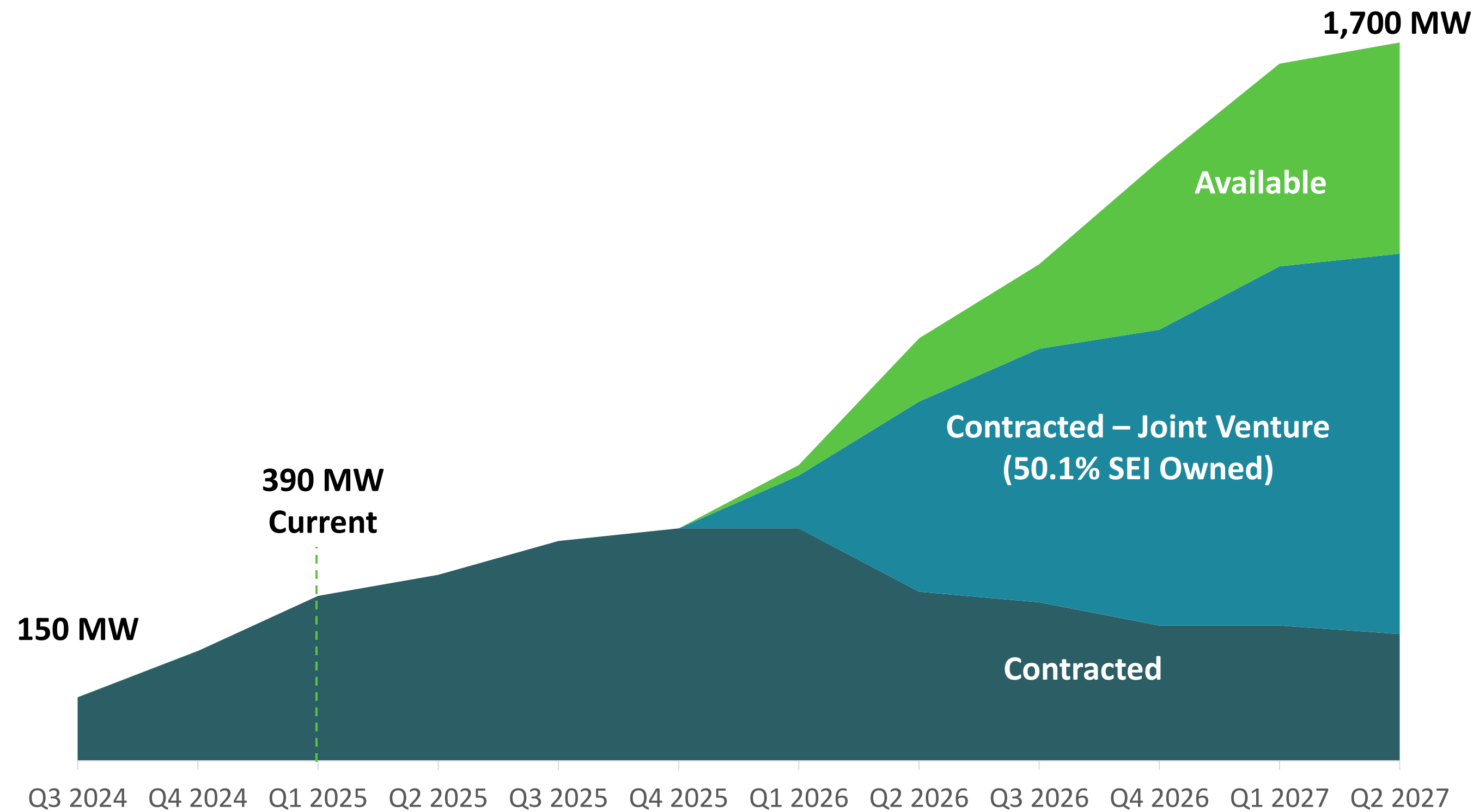
(2) Illustrative contribution assuming flat contribution for Logistics Solutions and potential contribution from deployment of 1.7 GW Operated (1.25 GW Net Owned) in Power Solutions which includes current fleet plus scheduled deliveries through early 2027

(3) Reflects net impact of ~900 MW Joint Venture with a data center customer that is 50.1% owned by SEI

# Rapid Growth as a Premier Power Solutions Company

Early Mover Advantage in Addressing Nascent and Rapidly Expanding Market Opportunity

Expected Fleet and Contract Growth Based on Current Order Book (MW)



Pro Forma Fleet  
(Current + On Order)

**1,700 MW  
Consolidated**

~450 MW  
Owned by  
49.9% JV  
Partner

**1,250 MW  
Net Owned  
by SEI**

1H 2027 Fleet

**2027+**

Potential for multi-year, unprecedented power demand growth opportunity

Advanced AI models/data centers could need up to 5GW each of power within the next few years <sup>(1)</sup>

Permian Basin power demand to grow by >8 GW in the next decade <sup>(2)</sup>

~60% of forecasted US power demand growth comes from non-AI drivers such as onshoring of manufacturing, electrification, EVs, etc. <sup>(3)</sup>

2027+

1) OpenAI "Infrastructure is Destiny" report dated September 2024; Wall Street Journal article "Inside the Audacious Plan to Reopen Three Mile Island's Nuclear Plant" dated November 10, 2024.  
 2) S&P Global "Electrifying the Permian Basin" report dated March 22, 2023.  
 3) Morgan Stanley "DeepSeek: US Power Infrastructure Implications" report dated January 28, 2025.



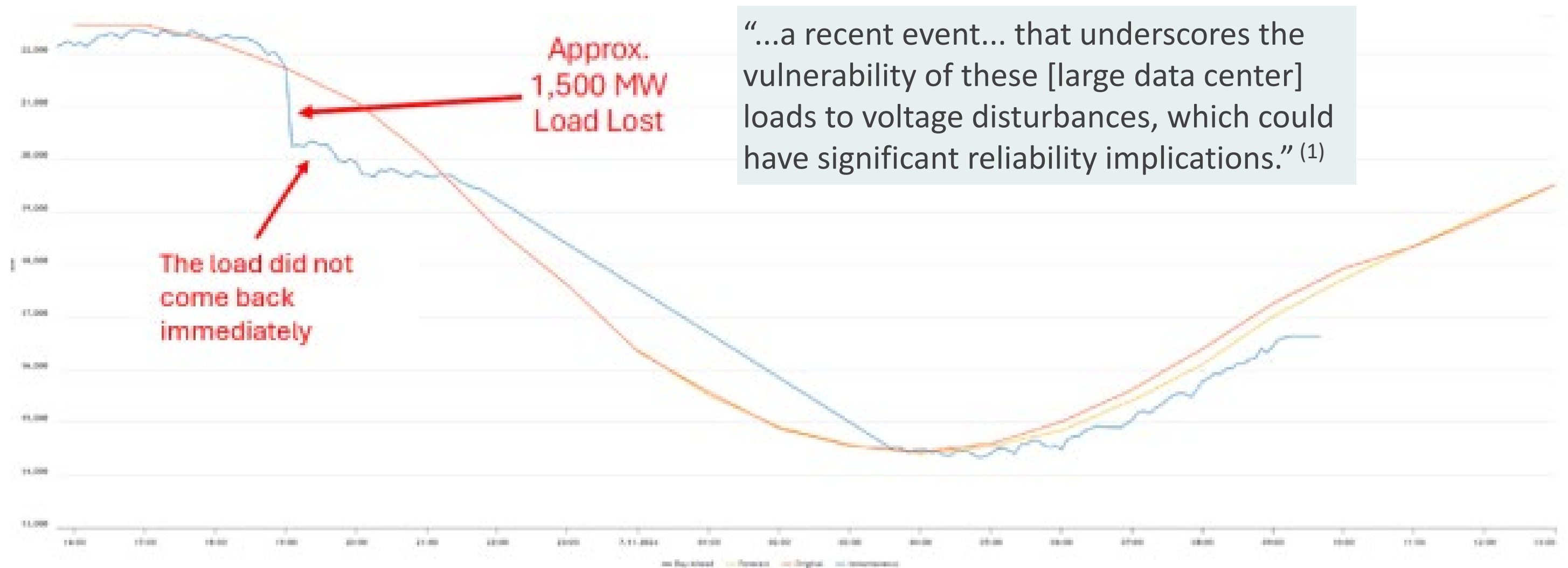
# Value Proposition of Off-Grid, Behind-the-Meter Power Solutions

## Rapid Time to Power

- ✓ **“Island” Mode**  
Lack of grid interconnection avoids potential delays and challenges from the interconnection process.
- ✓ **Modular, Medium Voltage Equipment**  
Shorter OEM lead times for turbines and distribution/balance of plant equipment (i.e., transformers, switchgear) allows rapid deployment. Modular design allows scaling in phases and offers operational redundancy.
- ✓ **Advanced Air Permit Planning**  
Building fleet with the lowest emissions profile available for gas turbines, combined with best available control technology, and filing air permits in advance.

## Resiliency and Reliability

- ✓ **Grid Reliability Challenges.** Large, volatile loads (like those seen from modern data centers) may be unlikely to source power 100% from the grid in a single node, driving the need for a longer-term off-grid solution.
- ✓ **NERC Warning to Grid Operators on Large Data Center Loads.** North American Electric Reliability Corporation (NERC) recently highlighted the risk that these vulnerable large loads pose to the grid.




1) Source: NERC Incident Review posted on 1/8/25



# Power-as-a-Service Business Model Comparison

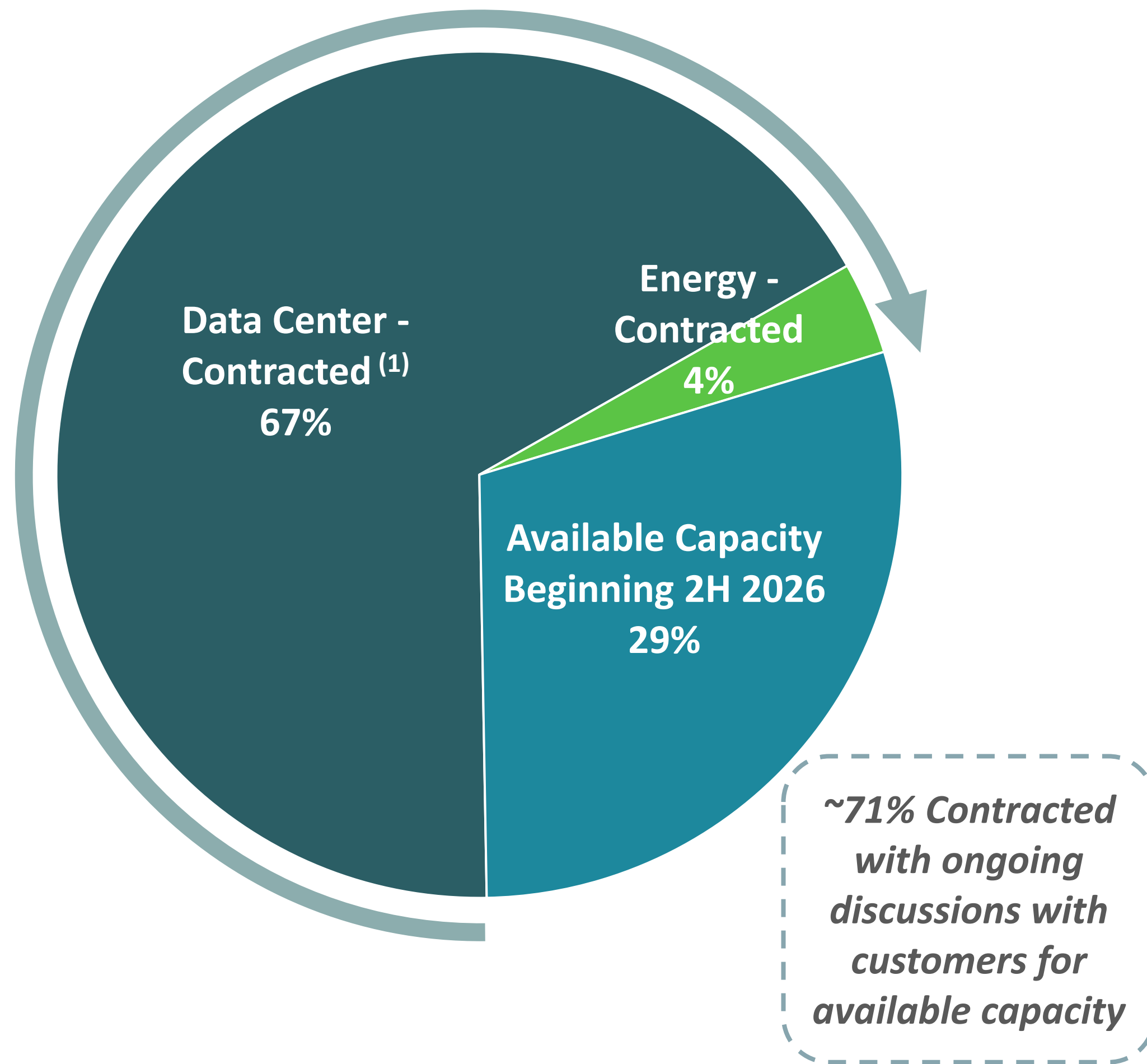
Solaris receives fixed monthly payments to provide co-located, behind-the-meter, turnkey service which includes the integrated provision of generation (turbines) and distribution (transformers, switchgear, and other ancillary equipment); Customer procures and pays for fuel

		Industrial Rental Companies	Independent Power Producers	Regulated Utilities
<b>Rapid Time to Power (&lt;12 months)</b>	✓	✓		
<b>Asset Mobility &amp; Scalability</b>	✓ ✓ Mobility & Scalability	✓ Mobility		
<b>Electricity Value Chain</b>	✓ ✓ Generation & Distribution	✓ Generation	✓ Generation	✓ ✓ ✓ Generation, Transmission & Distribution
<b>Stable Cash Flows</b>	✓ Fixed Monthly	✓ Fixed Monthly	Spark Spread * kWhs	✓ Allowed Return
<b>End Market Flexibility (MW)<sup>(1)</sup></b>	✓ 5-1,000 MW (Small-Large)	<10 MW (Small)	50-1,000+ MW (Large)	50-1,000+ MW (Large)

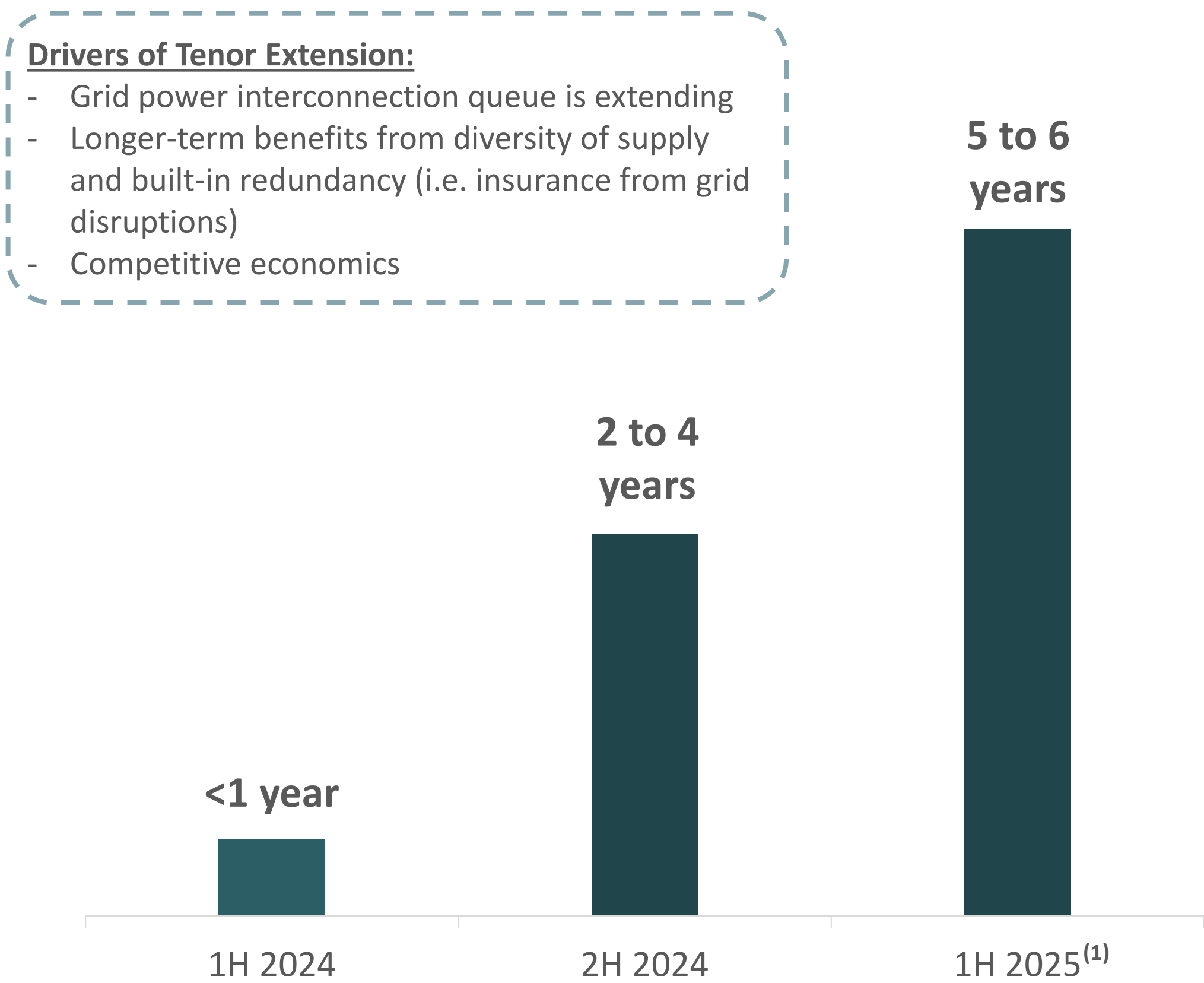
1) Source: EIA Inventory Of Operating Generators.

# Solaris Power Solutions Fleet is Highly Contracted

Customer End Market Exposure of Expected Total Operated 1,700 MW Fleet in 1H 2027



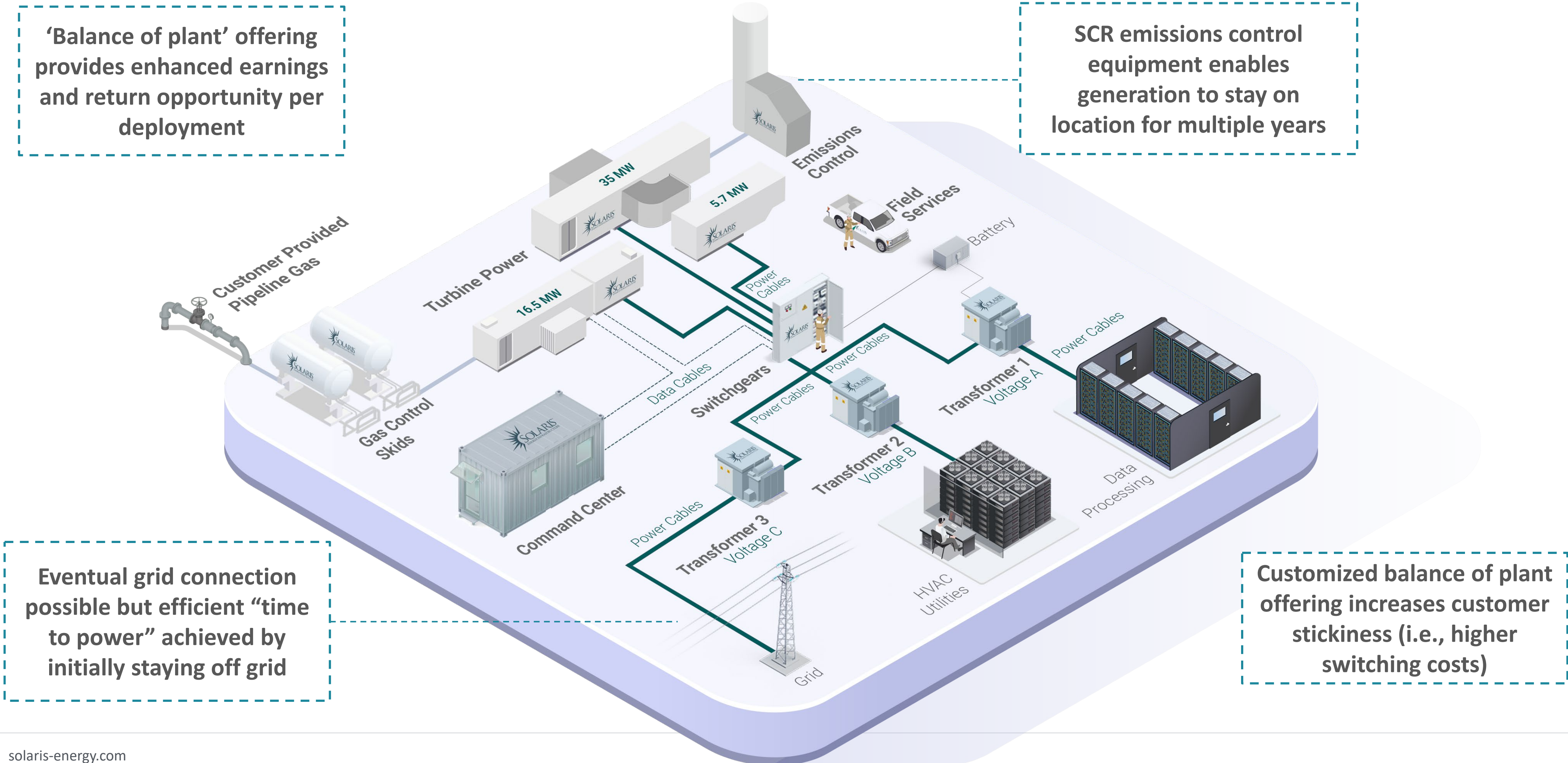
Evolution of Average Contract Tenor Over the Last Year



1) Inclusive of Joint Venture rental agreement.

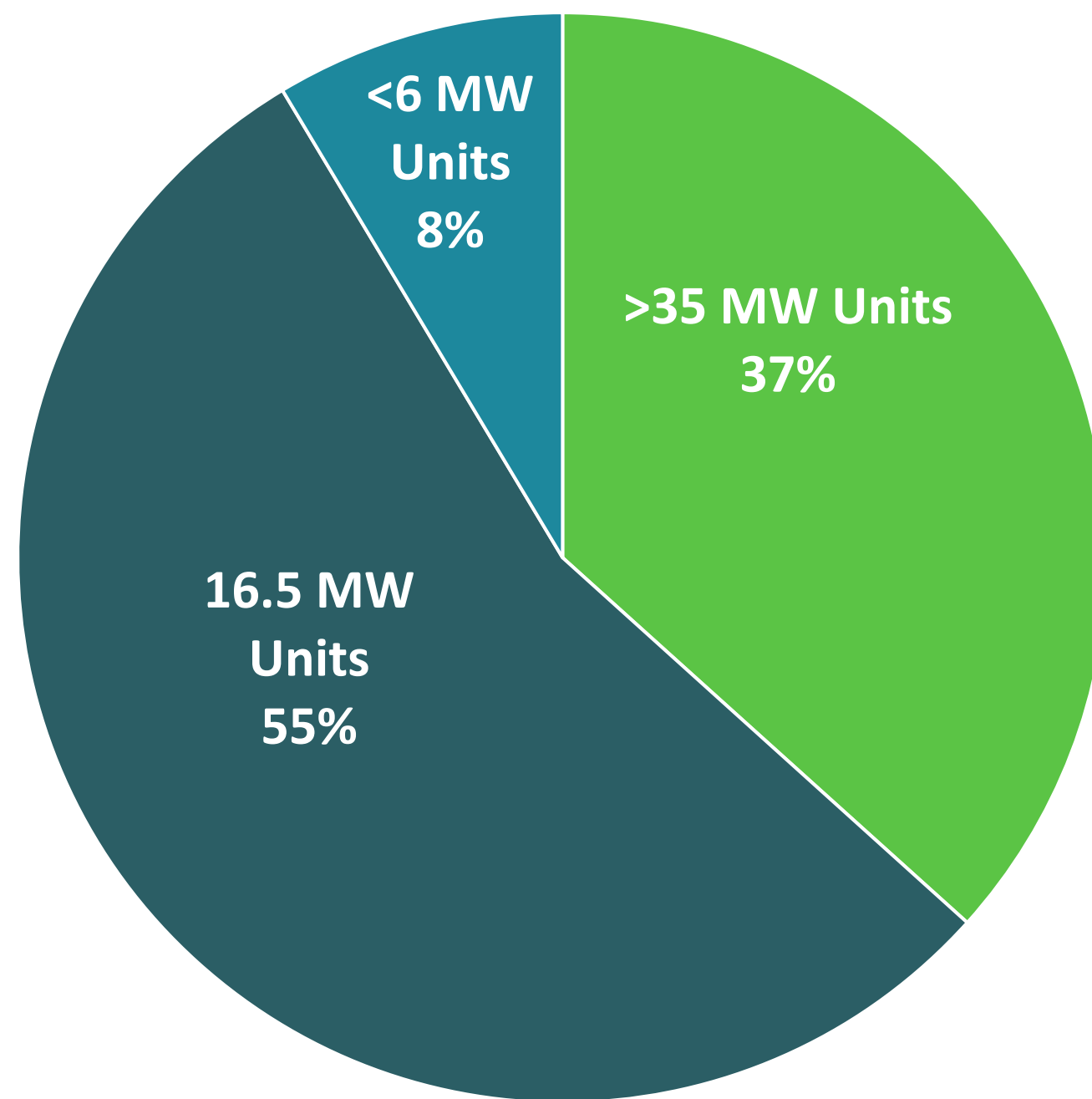
# 'Balance of Plant,' Or Distribution Services, Increasingly Critical to Power-as-a-Service Model

Balance of Plant Design is Customized to Each Customer's Location and Application



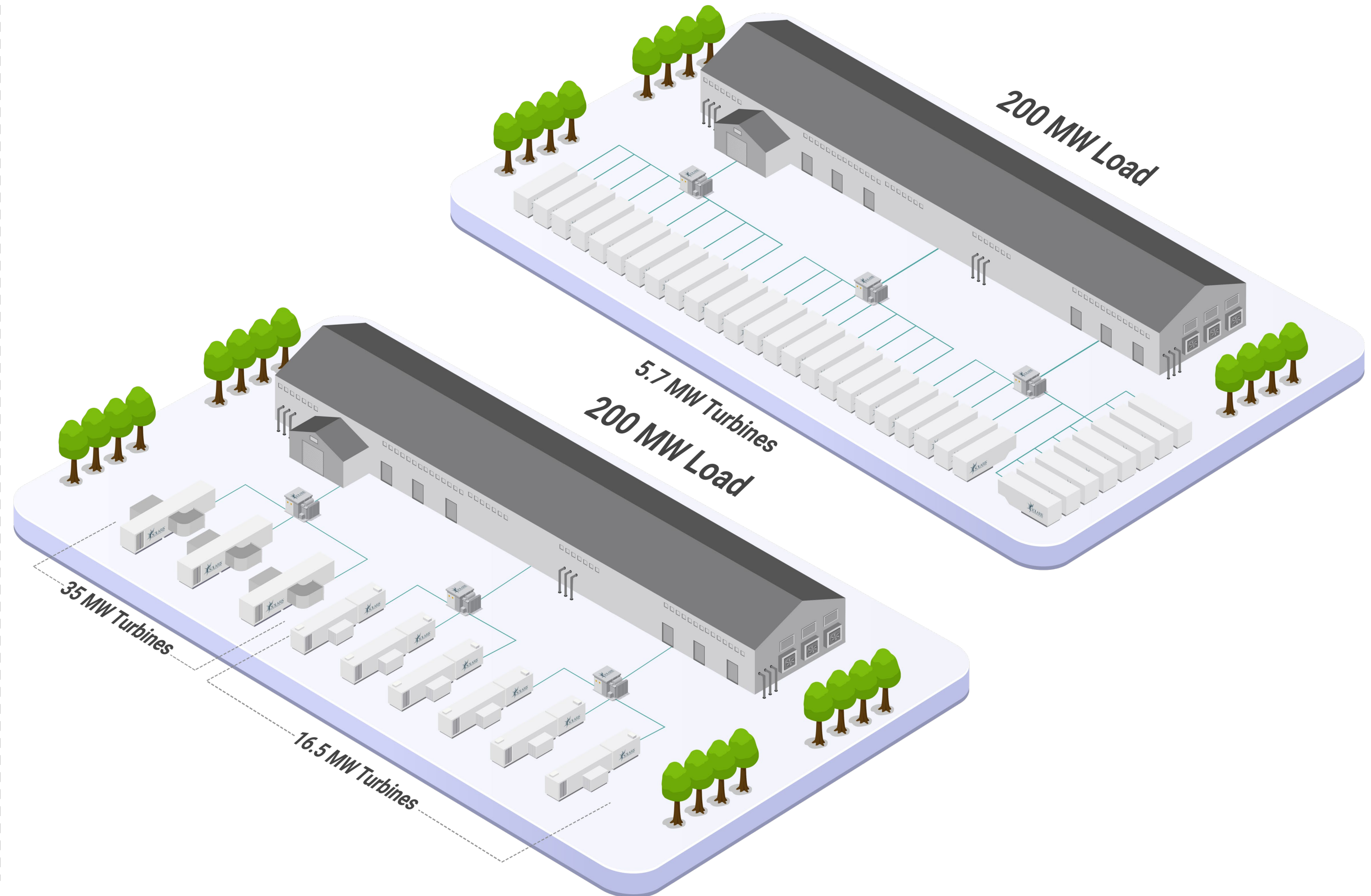
# Modular Fleet Design Allows us to be Nimble and Optimize Power Density Footprint

Size Distribution of Pro Forma 1,700 MW Fleet <sup>(1)</sup>



*Larger Turbines Well-Suited for Modular Scaling to Serve Large Power Needs, While Still Providing Flexibility / Redundancy and Minimizing Downtime Risk*

Illustrative Benefit of a Range of Larger Unit Sizes



<sup>1)</sup> Inclusive of potential contribution from deployment of 1.7 GW Operated (1.25 GW Net Owned) in Power Solutions which includes current fleet plus scheduled deliveries through early 2027.



# Building a Competitive Advantage Through Scale, Breadth, Expertise and Service



## Reliability

High uptime performance, with proven track record in multiple end markets



## Speed to Market

Rapid deployment, including industry's fastest power ramp on a large, hyperscaler data center



## Environmental Advantage

Best-in-class emissions profile using natural gas and Best Available Controls Technology + Ability to use hydrogen



## High-Touch Support

24-7 field engineering and operational support services



## Technical Expertise

Skilled in managing variable loads, multiple voltage requirements, and complex operations



## Supply Chain Agility

Alignment with high-quality procurement partners allows to grow offering by navigating through supply chain tightness

# Team Track Record: Built and Sustained a Leading Market Position in Logistics Solutions

Cost Effective and Reliable Services Drive Leading Market Position

**SEI <1%**  
Total Monthly Well Cost

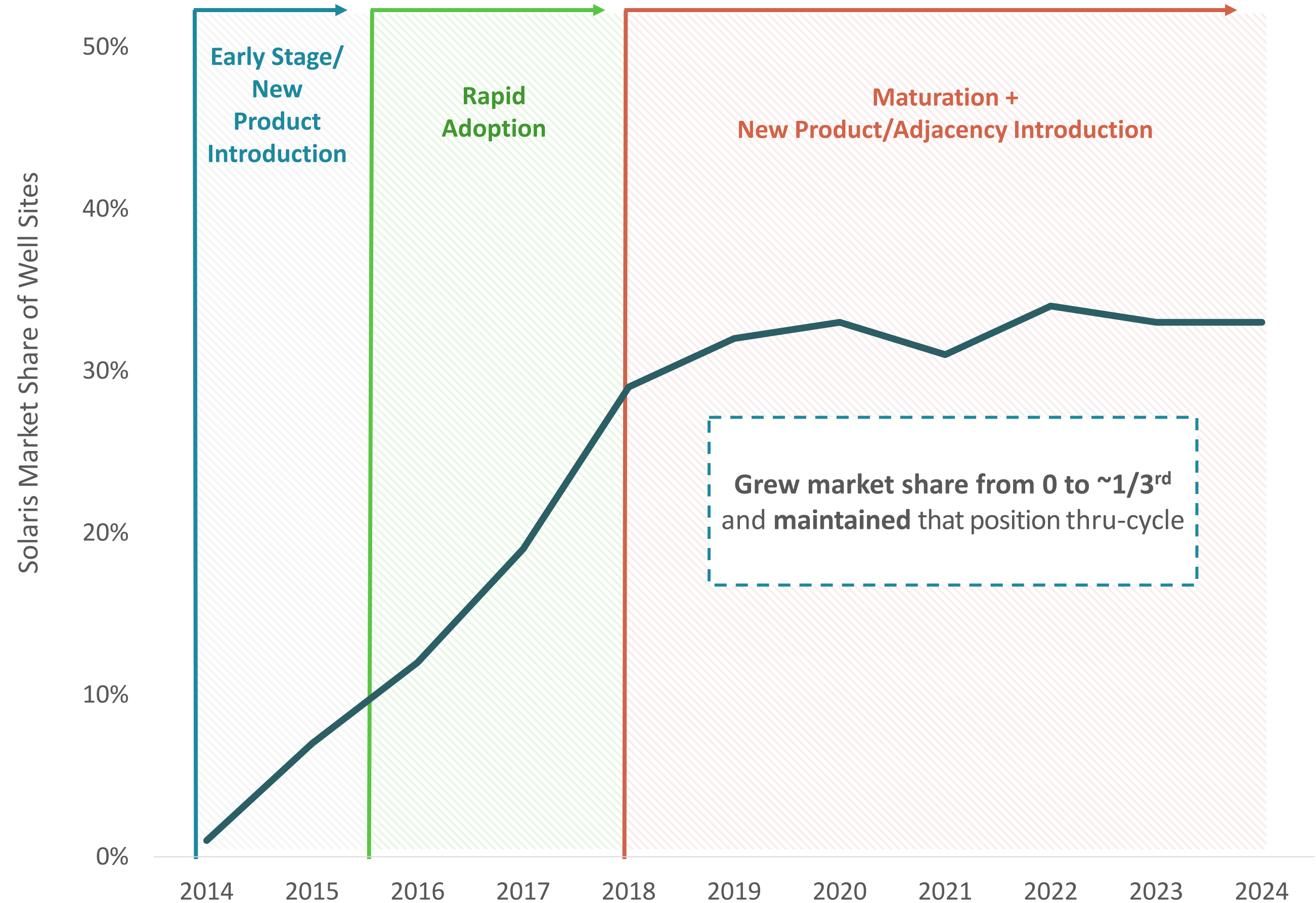
Customer keeps majority of efficiency gain benefits

+

**>99% Uptime**  
Performance

Equipment reliability driven by design and field service support

Sustained Market Position Thru-Cycle



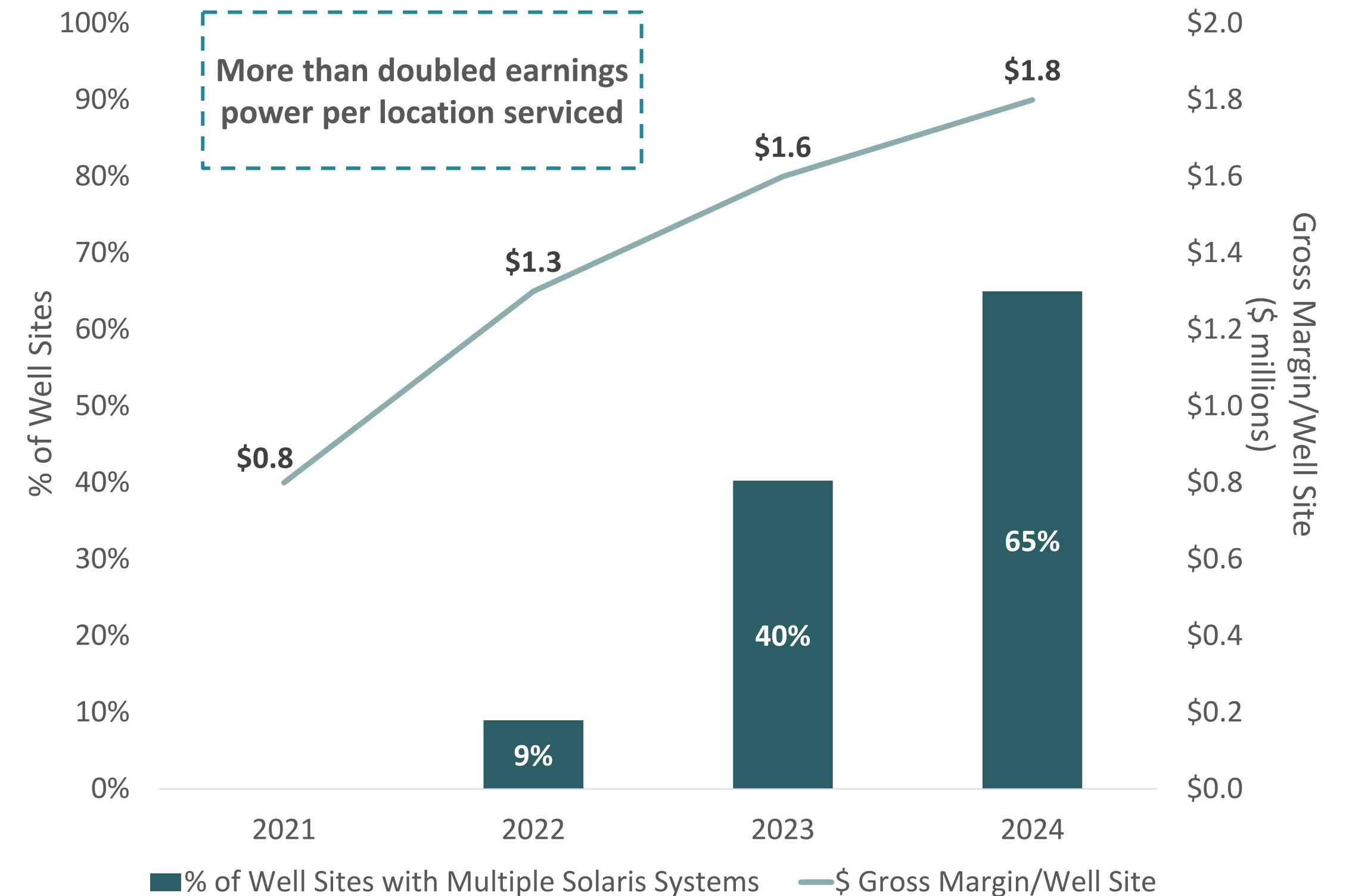
Source: Company data.

# Logistics Solutions: Continued to Innovate and Drive Earnings Power

## Evolution of Solaris Logistics Product and Service Offering



## Impact of Adding New Product Adjacencies








# Solaris' Track Record and Framework for Generating Sustainable Returns

## Experienced Management Team

Management team has successfully addressed equipment-based bottlenecks and built differentiated businesses in:

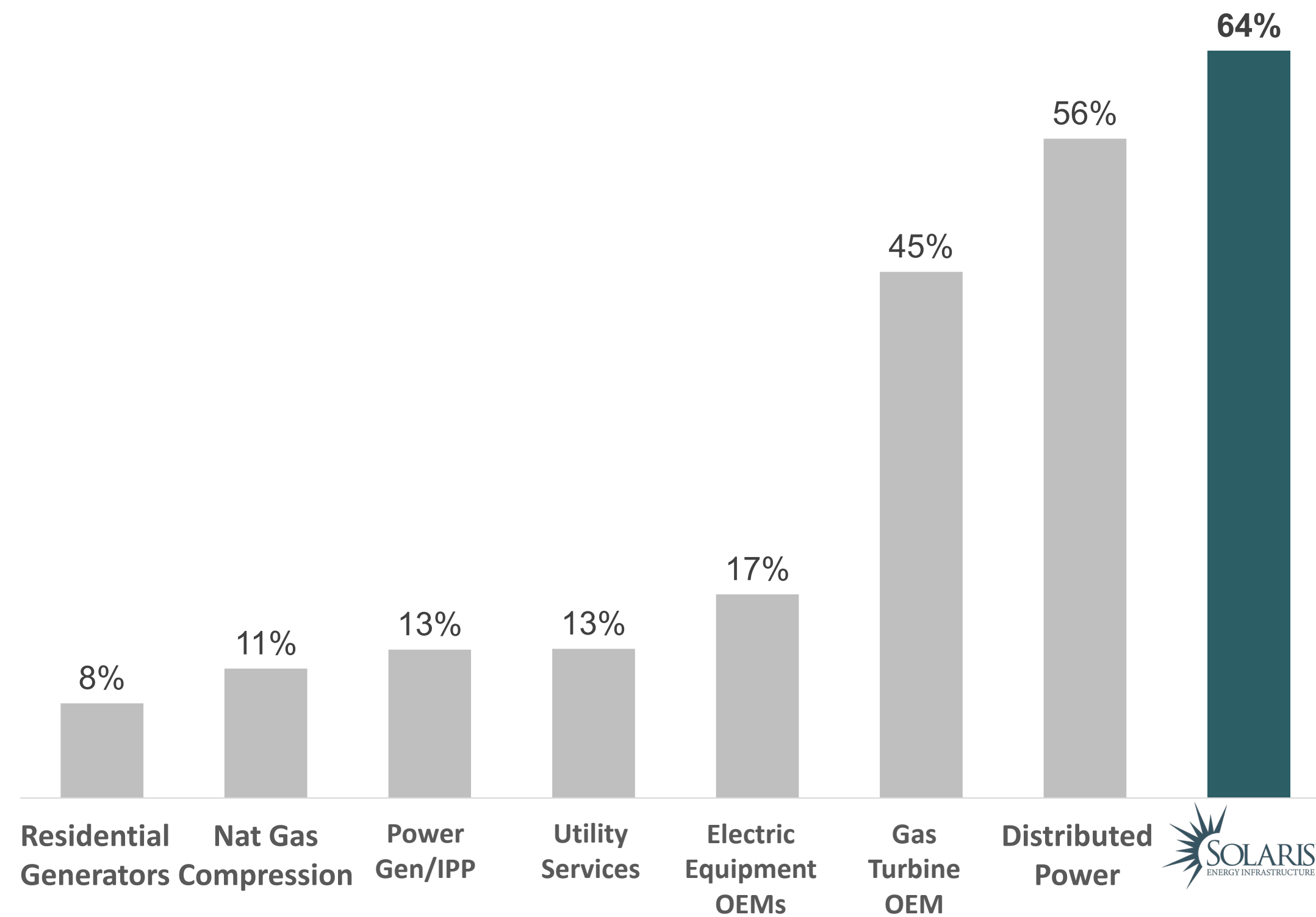
-  **Sand Handling and Trucking** – Legacy Solaris Logistics business and follow on top-fill product
-  **Water Handling and Recycling** – SEI Founder and CEO also founded Aris Water Solutions (NYSE: ARIS)
-  **Power Markets** – Solaris Power team has a long track record of developing distributed power solutions

## Returns Framework

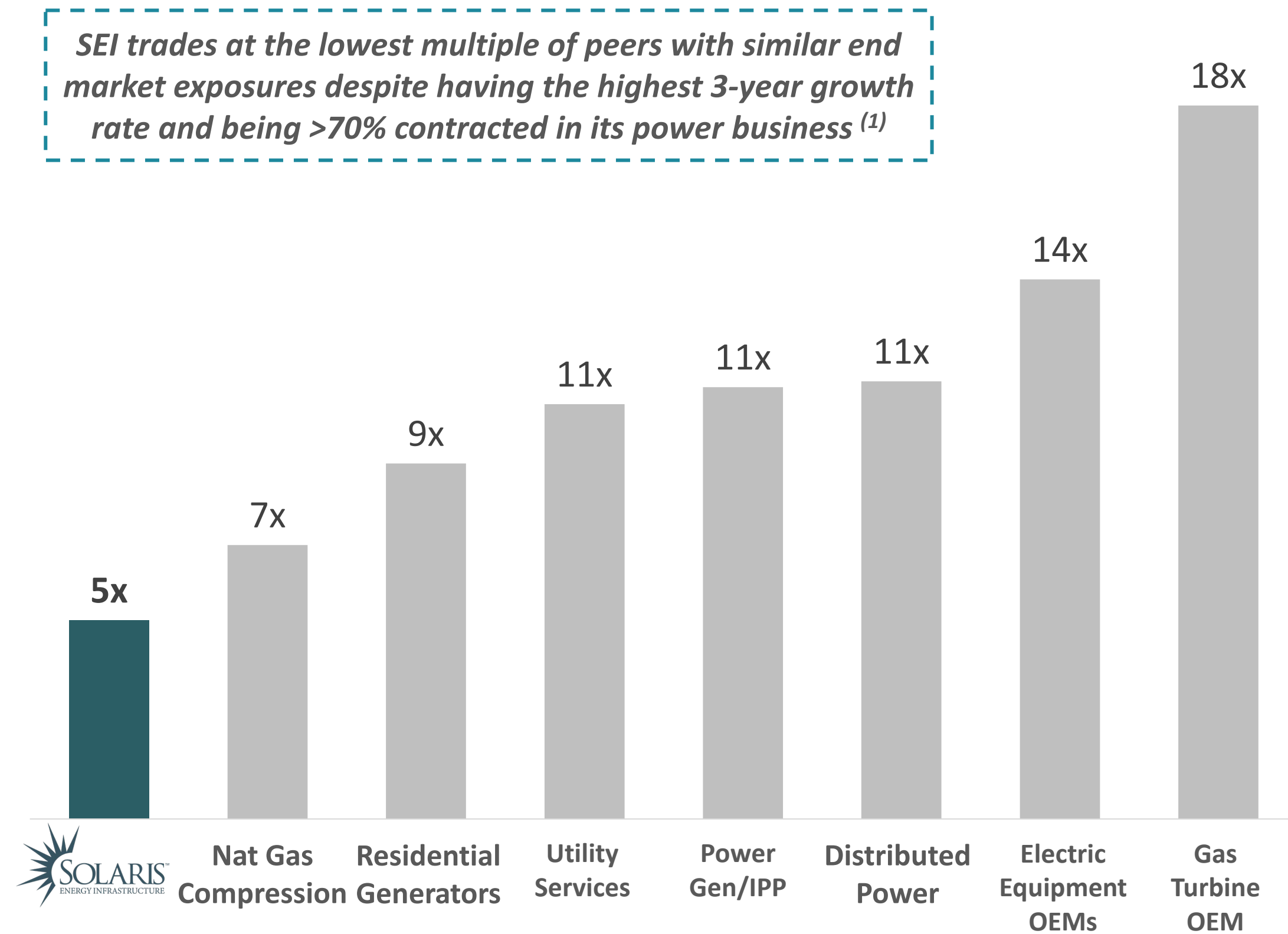


# A Unique Way to Invest in Electrification – High Growth Trading at a Discount

Bloomberg Three-Year (2024-2027) EBITDA CAGR (As of 5/13/2025)



Bloomberg EV / 2027 Adjusted EBITDA Multiple (As of 5/13/2025)



*SEI trades at the lowest multiple of peers with similar end market exposures despite having the highest 3-year growth rate and being >70% contracted in its power business <sup>(1)</sup>*

Industry Constituents:

Distributed Power: BE  
 Electric Equipment OEMs: POWL, ITRI, VRT  
 Power Gen/IPP: CEG, NRG, TLN, VST

Utility Services: PWR, MTZ, DY, PRIM, MYRG  
 Natural Gas Compression: AROC, KGS, NGS, USAC  
 Residential Generators: GNRC  
 Gas Turbine OEM: GEV

Source for both charts: Bloomberg as of 5/13/2025

(1) Solaris Adjusted EBITDA assumes midpoint of illustrative full 1.7 GW deployment of \$440-465 million Adjusted EBITDA contribution and pro forma debt of \$730 million (\$325 term loan + \$155 convert + ~\$250 estimated 50.1% portion of JV debt facility)

## Key Takeaways



Provides **Critical, Behind-the-Meter** Power Infrastructure Which Remains in **Short Supply** and is Deployed With **Customers that are Growing**



**Contract Coverage at Longer-term Tenors** Significantly Derisks Cash Flows and Supports Future Growth



**Aligned, Founder-Led Management Team** with Material Ownership of Combined Business



Logistics Solutions **Generates Cash** That is Funding High-Return Opportunity to Grow Power Solutions



**Compelling Valuation** with **Attractive Returns** Expected on Equipment On-Order



**Committed to Growth and Returns** While Maintaining the Dividend and a Conservative Financial Profile

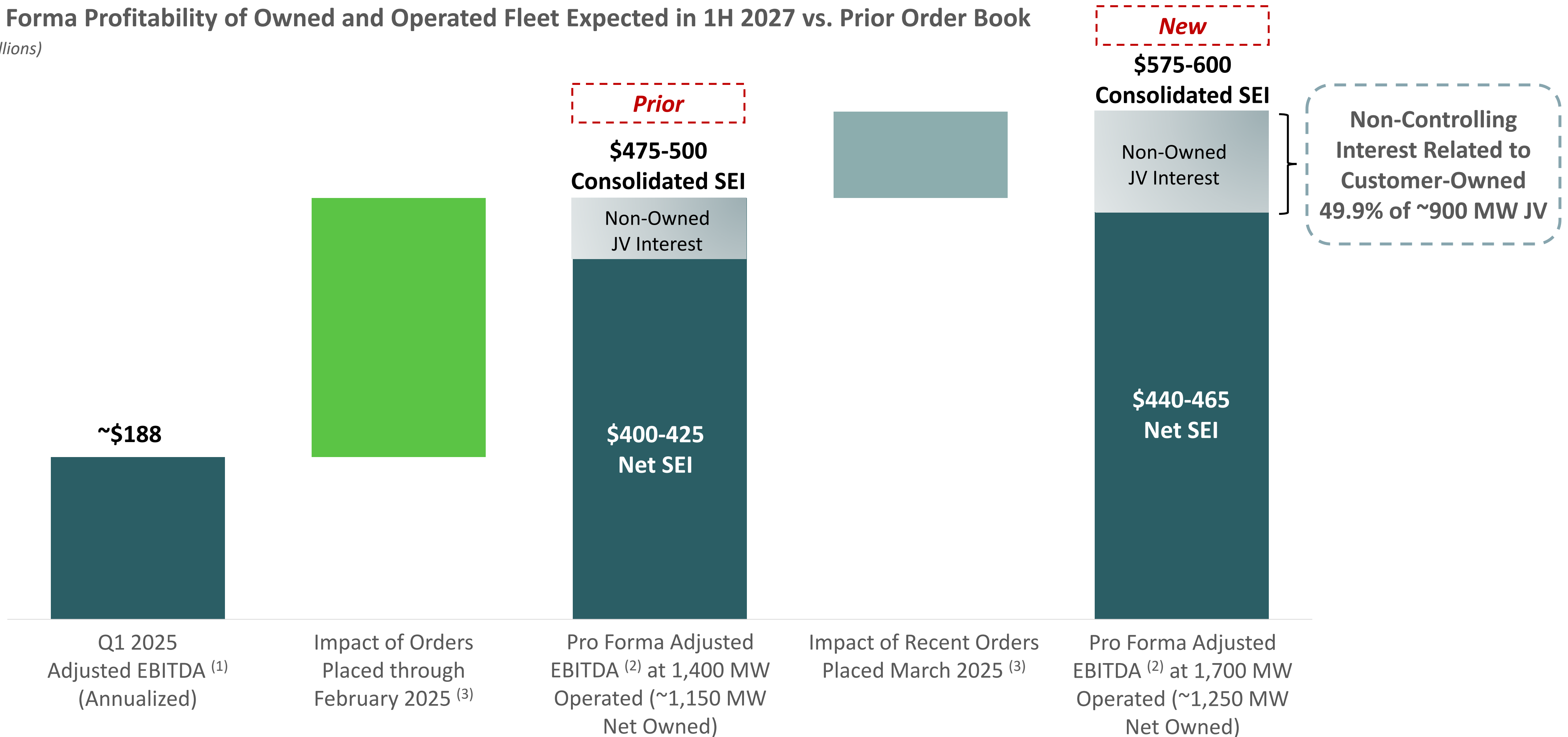


# Appendix



# Illustrative Pro Forma Adjusted EBITDA<sup>(1)</sup> Opportunity at Full Fleet Deployment

Pro Forma Profitability of Owned and Operated Fleet Expected in 1H 2027 vs. Prior Order Book  
 (\$ millions)



1) Non-GAAP financial metric. Please see Appendix for reconciliation to the nearest GAAP metric.

2) Non-GAAP financial metric. Due to the forward-looking nature, we cannot provide a reconciliation to the nearest GAAP metric without unreasonable effort.

3) Each purchase order includes distinct product specifications, such as product type, quantity, delivery period, and price, as well as standard terms and conditions with respect to acceptance, delivery, transportation, inspection, assignment, taxes, and performance failure.



# Updated Capital Plan: Growth to 1,700 MW Operated Fleet in 1H 2027

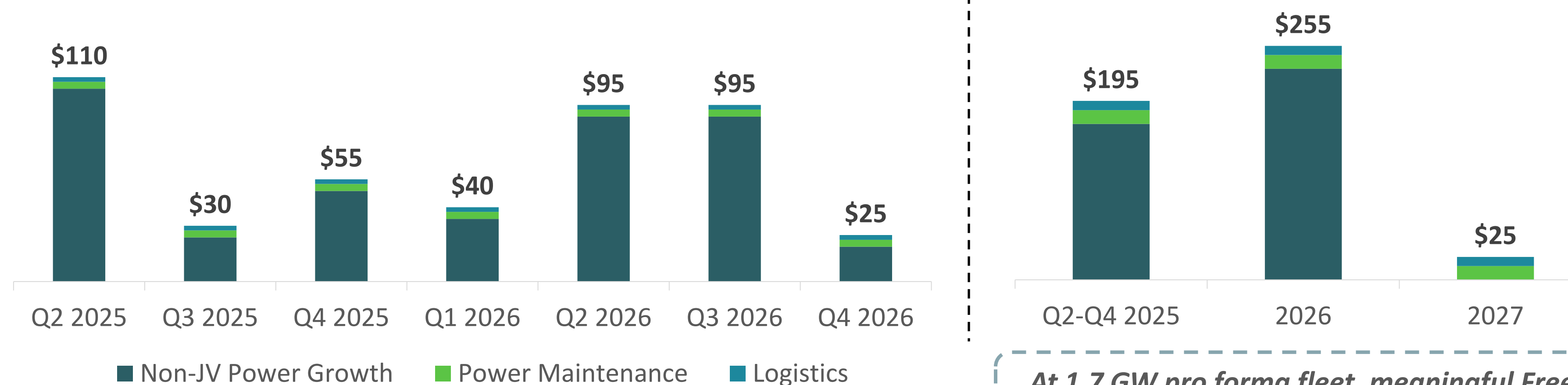
## Expected Remaining Consolidated Capex Driven by Power Solutions Order Book, Reduced by Funding from Partnership

(\$ millions)

	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026	Q3 2026	Q4 2026	Q2-Q4 2025	2026	2027
Consolidated Capex <sup>(1)</sup>	\$235	\$60	\$195	\$160	\$175	\$145	\$45	\$490	\$525	\$25
(-) Cash Equity from JV Partner <sup>(2)</sup>	(\$85)							(\$85)	-	-
(-) Expected JV Debt Financing <sup>(3)</sup>	(\$40)	(\$30)	(\$140)	(\$120)	(\$80)	(\$50)	(\$20)	(\$210)	(\$270)	-

= Solaris Funded Capex

*Remaining capex spend reflects stand-alone SEI needs as JV becomes self-funding in Q2 2025*



*At 1.7 GW pro forma fleet, meaningful Free Cash Flow generation should begin in late 2026*

1) Consolidated Capex includes the 49.9% of the proposed Joint Venture capital needs expected to be funded by the Joint Venture partner  
 2) Solaris portion of cash equity investment into the JV was included in Q1 2025 capital expenditures  
 3) Expected debt financing facility of up to \$550 million based on 80% loan-to-value of total JV capital expenditures



## Operational and Financial Guidance: Q2 2025 and Q3 2025

	<u>Q1 2025 Actual</u>	<u>Q2 2025 Guidance (Unchanged)</u>	<u>Q3 2025 Guidance (Introduced)</u>
<b>Operational</b>			
Average MWs on Revenue (Power Solutions)	390 MW	440 MW	520 MW
Average Fully Utilized Systems (Logistics Solutions)	98	~90-95	
<b>Profitability</b>			
Segment Adjusted EBITDA	\$58 million	\$57-62 million	\$62-67 million
Unallocated Expenses	(\$11 million) <sup>(1)</sup>	(\$7 million)	(\$7 million)
<b>Total Company Adjusted EBITDA</b>	<b>\$47 million<sup>(2)</sup></b>	<b>\$50-55 million<sup>(3)</sup></b>	<b>\$55-60 million<sup>(3)</sup></b>

1) Included higher than normal restricted share award vesting tax impact and cash settlement of performance share units granted in 2023 and 2024 that are not expected in Q2 2025 or Q3 2025.

2) Non-GAAP financial metric. Please see Appendix for reconciliation to the nearest GAAP metric.

3) Non-GAAP financial metric. Due to the forward-looking nature, we cannot provide a reconciliation to the nearest GAAP metric without unreasonable effort.



## Selected Other Financial Guidance: Q2 2025 and Q3 2025

	<u>Q1 2025 Actual</u>	<u>Q2 2025 Guidance</u>	<u>Q3 2025 Guidance</u>
<b>Net Interest Expense <sup>(1)</sup></b>	\$5 million	\$6 million	\$6 million
<b>Depreciation &amp; Amortization Expense</b>	\$20 million	~\$22-25 million	\$27-30 million
<b>Weighted Average Total Shares Outstanding (Class A + Class B; millions)</b>	68 million	68 million	68 million
<b>Effective tax rate on Pro Forma Pre-tax Income (%)</b>	25%	25%	25%

1) Q1 2025 Net Interest Expense included approximately \$1 million of interest income and excluded capitalized interest of approximately \$3 million; Guidance assumes total cash interest expense of approximately \$9 million per quarter on current outstanding debt of \$325 million, which could be offset by \$3-4 million of capitalized interest as reflected on the Income Statement.



## EBITDA and Adjusted EBITDA Reconciliation

(\$ in 000s)	<u>Three months ended,</u>				<u>Twelve months ended December 31,</u>		
	March 31, 2025	December 31, 2024	September 30, 2024	June 30, 2024	2024	2023	2022
Net income (loss)	\$17,481	\$14,004	(\$2,210)	\$9,824	\$28,918	\$38,775	\$33,512
Depreciation and amortization	20,064	16,728	10,991	9,565	47,218	36,185	30,433
Interest (income) expense, net	5,171	7,392	2,932	685	11,808	3,307	489
Provision for income taxes <sup>(1)</sup>	(597)	4,343	460	1,345	8,005	7,820	7,803
<b>EBITDA</b>	<b>\$42,119</b>	<b>\$42,467</b>	<b>\$12,173</b>	<b>\$21,419</b>	<b>\$95,949</b>	<b>\$86,087</b>	<b>\$72,237</b>
Gain on sale of Kingfisher facility <sup>(2)</sup>	-	(7,461)	-	-	(7,461)	-	-
Property tax contingency <sup>(3)</sup>	-	-	-	(2,483)	(2,483)	-	3,072
Accrued property tax <sup>(4)</sup>	-	-	-	(1,794)	(1,794)	-	-
Stock-based compensation expense <sup>(5)</sup>	3,277	3,043	2,673	2,659	10,592	7,732	6,092
Loss on extinguishment of debt <sup>(6)</sup>	-	-	4,085	-	4,085	-	-
Impairment on fixed assets <sup>(7)</sup>	-	-	-	-	-	1,423	-
Acquisition-related costs <sup>(8)</sup>	-	416	3,065	877	4,358	-	-
Change in payables related to Tax Receivable Agreement <sup>(9)</sup>	-	(1,559)	(39)	-	(1,598)	-	(663)
Other <sup>(10)</sup>	1,485	481	274	119	1,454	1,451	3,044
<b>Adjusted EBITDA</b>	<b>\$46,881</b>	<b>\$37,387</b>	<b>\$22,231</b>	<b>\$20,797</b>	<b>\$103,102</b>	<b>\$96,693</b>	<b>\$83,782</b>

1) United States federal and state income taxes.

2) Represents gain recognized on the sale of a 300-acre transload facility located in Kingfisher, Oklahoma and termination of associated lease. All assets had zero net carrying value at the time of sale.

3) Represents reversal of a portion of previously recognized property tax contingency following a settlement agreement with Brown County Appraisal District, included as gain on reversal of property tax contingency in the consolidated statement of operations.

4) Represents reversal of previously recognized accrued property tax expenses following a settlement agreement with Brown County Appraisal District, included in cost of services in the consolidated statements of operations.

5) Represents stock-based compensation expense related to restricted stock awards and performance-based restricted stock units.

6) Primarily consists of the write-off of the unamortized portion of debt financing costs associated with securing a bridge financing facility, which had not been utilized and was subsequently extinguished upon obtaining alternative financing for the MER Acquisition.

7) Impairment recorded on certain fixed assets classified as assets held for sale during the three months ended September 30, 2023.

8) Represents costs incurred to affect the MER Acquisition.

9) Reduction in liability due to state tax rate change.

10) Other includes the net effect of credit losses, ERP implementation costs, legal fees incurred to execute debt amendments, loss/gain on disposal of assets, transaction costs incurred for activities related to acquisition opportunities, inventory write-offs and other settlements.

## Company Values



### COMMUNICATION

We function as a flat organization, communicating and sharing information and knowledge.



### RECOGNITION

We recognize, praise and celebrate success.



### ENTREPRENEURSHIP

We provide solutions in a quick, safe, efficient and proactive way.



### ACCOUNTABILITY

We are accountable to each other and the company. We understand that facts are friendly and an opportunity to learn and improve.



### TEAMWORK AND TRANSPARENCY

We help each other and operate with integrity, fairness and transparency.



### OWNERSHIP

We take ownership of our areas and tasks, and empower others to get the job done.



### RESULTS

We are committed to deliver results for our customers and stakeholders in every project that we do.

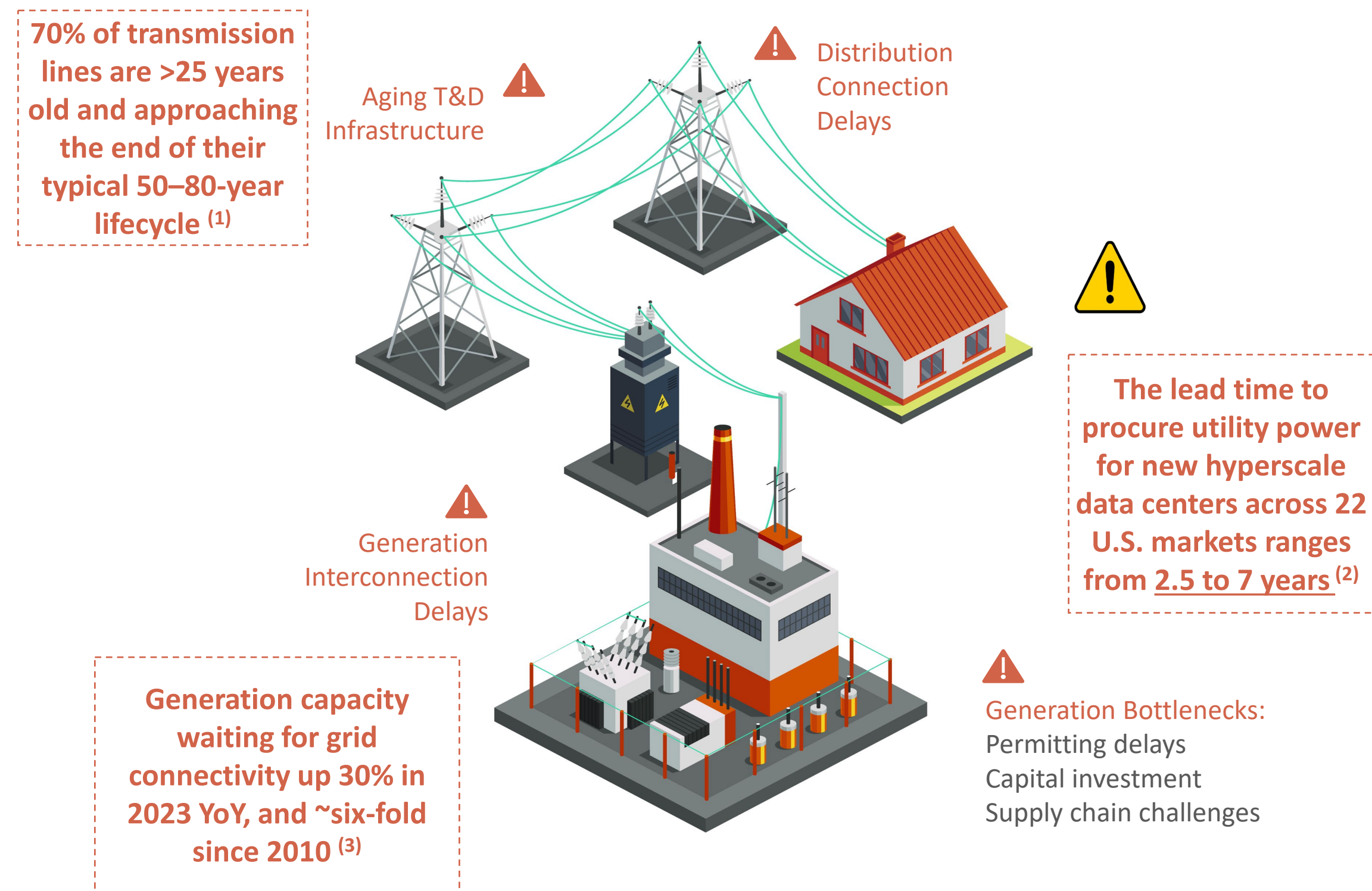


### SAFETY

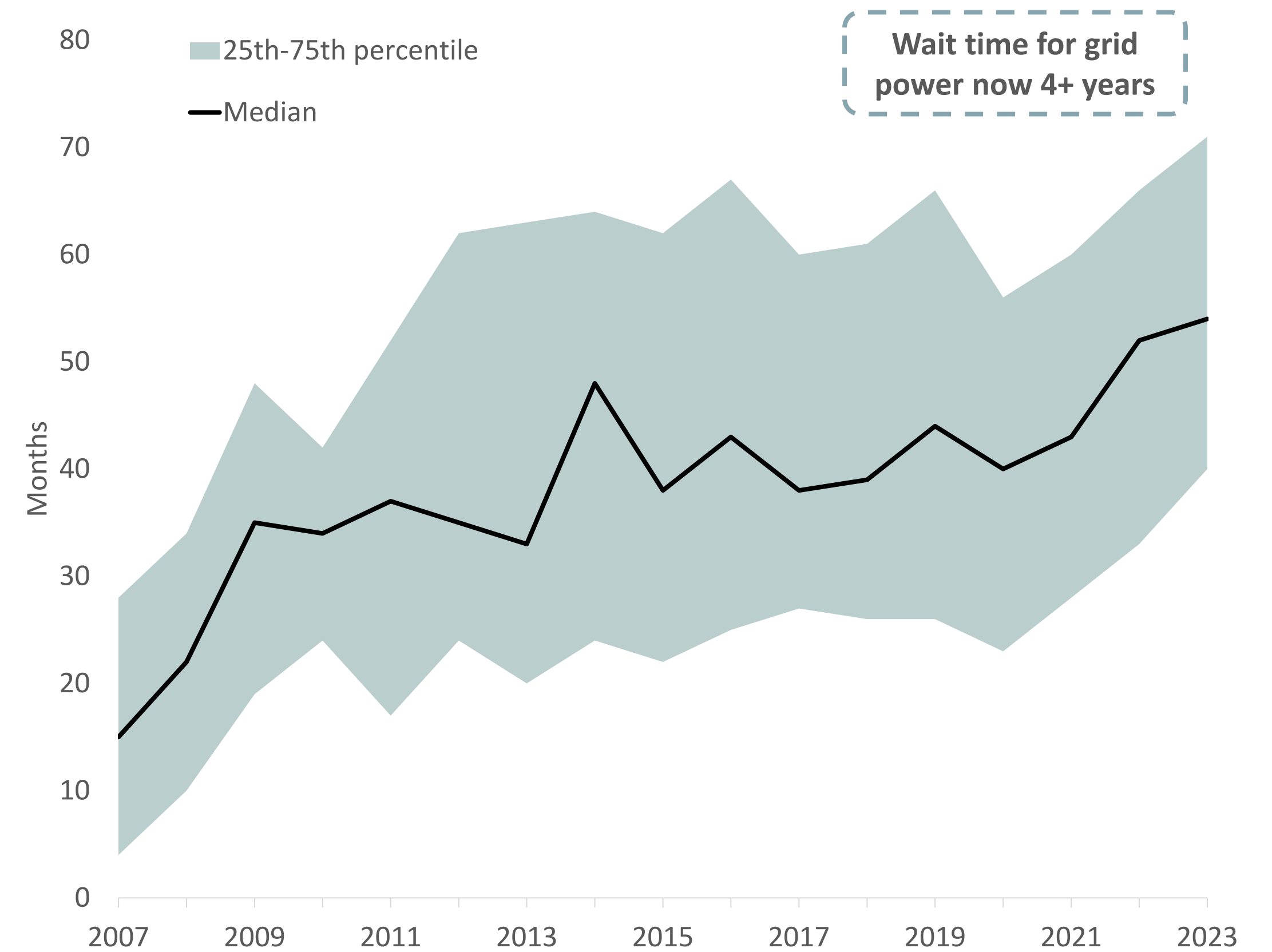
We provide and enforce a safe place to work every day, every time.

# Behind-the-Meter Power Accelerating due to Growing Market Demand and Grid Access Challenges

## Reliance on Grid Alone Presents Challenges; High Disruption/Delay Risk



## Grid Interconnectivity Queues from Request to Completion



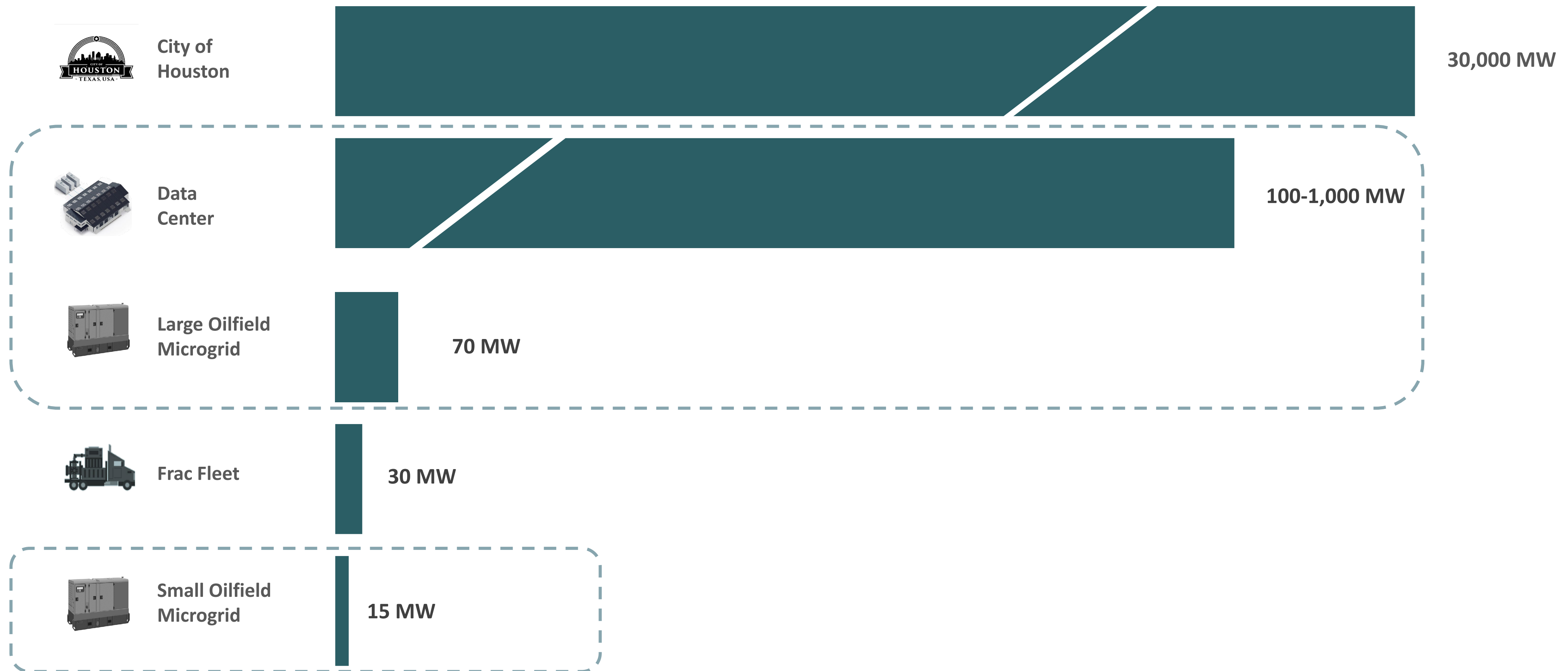
Source: Lawrence Berkely National Laboratory.

(1) US Department of Energy, Grid Deployment Office article "What does it take to modernize the US electric grid?" dated October 19, 2023  
 (2) TD Cowen research report "Data Centers, Generative AI & Power Constraints: The Path Forward" dated May 28, 2024.  
 (3) Lawrence Berkely National Laboratory report "Queued Up: 2024 Edition" dated April 2024.

# Pro Forma Fleet Consists of Units That Can Provide Quick Deployment and Are Configurable

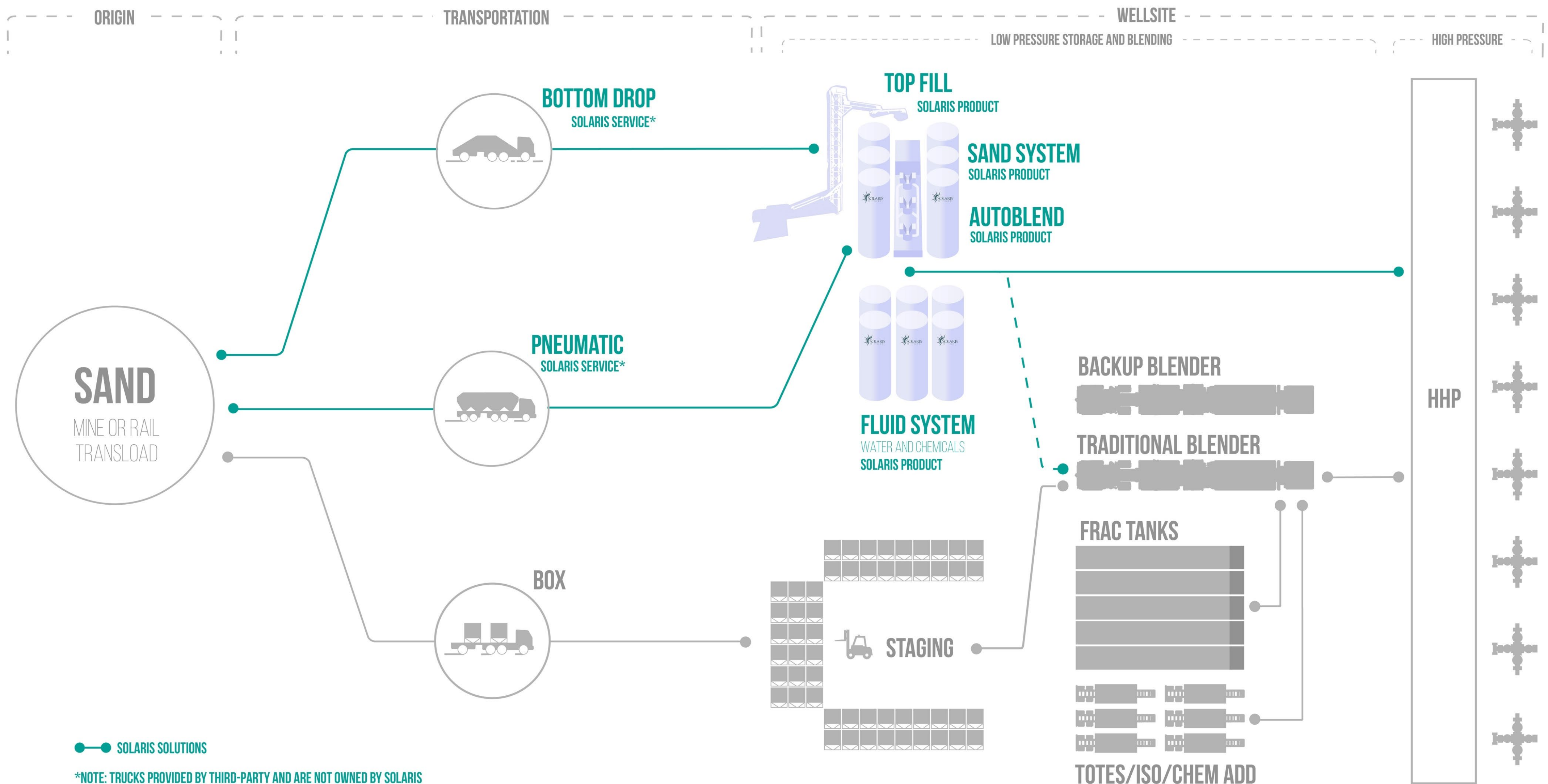
Configurable units allow for greater variety of applications

## Illustrative Scale of Power End Markets





# Solaris' All-Electric, Integrated Offering Drives Efficiency in the Low-Pressure Completions Value Chain





# Disclaimer

## Forward-Looking Statements

The information in this presentation includes forward-looking statements within the meaning of Section 27A of the Securities Act of 1933, as amended (the “Securities Act”), and Section 21E of the Securities Exchange Act of 1934, as amended. Examples of forward-looking statements include, but are not limited to, Solaris Energy Infrastructure, Inc.'s ("Solaris" or the "Company") benefits of the transaction with Mobile Energy Rentals LLC ("MER") and Solaris's future financial performance following the transaction, the recently announced Stateline joint venture and equipment rental orders and potential future financing strategies, entered into in connection therewith, Solaris's financing plans, strategy, future operations, financial position, estimated revenues, and losses, projected costs, prospects, plans and objectives of management with respect to the Solaris Power Solutions business and the other risks discussed in Part I, Item 1A. “Risk Factors” in the Annual Report on Form 10-K for the year ended December 31, 2024, filed with the U.S. Securities Exchange Commission (the “SEC”). Solaris' SEC filings are available publicly on the SEC's website at [www.sec.gov](http://www.sec.gov). Forward-looking statements are based on the current expectations and assumptions regarding the business, the economy and other future conditions. Because forward-looking statements relate to the future, by their nature, they are subject to inherent uncertainties, risks and changes in circumstances that are difficult to predict. As a result, the actual results may differ materially from those contemplated by the forward-looking statements. Factors that could cause the actual results to differ materially from the results contemplated by such forward-looking statements include, but are not limited to the factors discussed or referenced in the filings made from time to time with the SEC. Readers are cautioned not to place undue reliance on forward-looking statements, which speak only as of the date hereof. Factors or events that could cause the actual results to differ may emerge from time to time, and it is not possible for us to predict all of them. Solaris undertakes no obligation to publicly update or revise any forward-looking statement, whether as a result of new information, future developments or otherwise, except as may be required by law.

## About Non-GAAP Measures

In addition to financial results determined in accordance with generally accepted accounting principles in the United States (“GAAP”), this presentation includes non-GAAP financial measures. Management believes that Adjusted EBITDA and net debt (total debt less cash and cash equivalents) provides useful information to investors regarding the Company's financial condition and results of operations because they help facilitate analysis of operating performance. In particular, we view Adjusted EBITDA as an important indicator of performance. We define EBITDA as net income, plus (i) depreciation and amortization expense, (ii) interest expense and (iii) income tax expense, including franchise taxes. We define Adjusted EBITDA as EBITDA plus (i) stock-based compensation expense and (ii) certain non-cash items and extraordinary, unusual or non-recurring gains, losses or expenses.

Although management believes the aforementioned non-GAAP financial measures are good tools for internal use and the investment community in evaluating Solaris' overall financial performance, the foregoing non-GAAP financial measures should not be considered as a substitute for or superior to other measures of financial performance prepared in accordance with GAAP.

## Industry and Market Data

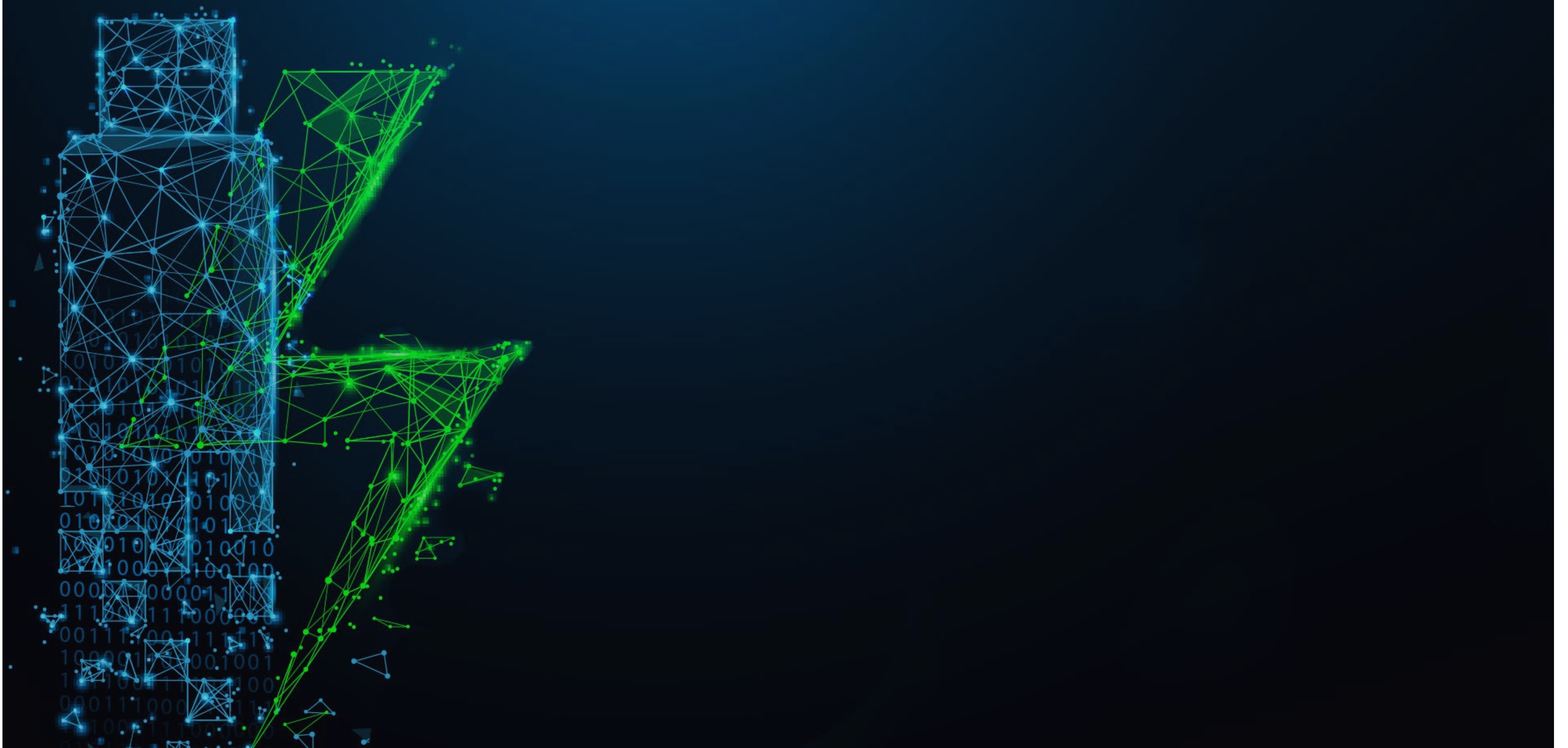
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Solaris Energy Infrastructure  
9651 Katy Freeway, Suite 300  
Houston, Texas 77024

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