



Parkway
CORPORATE LIMITED



Building an advanced
**industrial water treatment
technology company.**

2023 AGM – MD PRESENTATION



CY2024 - COMMERCIALISATION UPDATE

30 November 2023

ASX: PWN | pwnps.com

Bahay Ozcakmak

Group Managing Director & CEO

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Additional Information

This presentation has been prepared by Parkway Corporate Limited (“Parkway” or the “Company”)(ASX: PWN) and has been released on the ASX announcement platform and is also available at the Company website:

www.pwnps.com

Additional information regarding the Company can also be found at the Company’s website, or by contacting the Company at:

ir@pwnps.com

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CY2023: Key Highlights

Technology (PPT)

- Completed full Feasibility Study for global energy company.
- **Launched Master Plan** and progressed key objectives.
 - Aligned Master Plan with objectives of key stakeholders.
 - Advanced upstream brine concentration opportunities.
- Incubating various strategic technologies.
 - Various near-term high value integration opportunities.

Operations (PPS)

- Continued to successfully expand industrial client base.

Financial

- Record revenue growth (\$4 - 5m).
- Strengthened balance sheet (\$4.9m cash at 30 Sep 2023).

CY2024 Strategic Priorities

- Technology – **scale-up** (Centre for Brine Technologies).
- Technology – **roll-out** (build delivery capabilities).
- Technology – **capture value** (various pathways).

“

Throughout 2023, we **successfully delivered** on our **key priorities** and positioned Parkway for transformational growth.

“

Innovation is (provides):

- The ability to see change as an **opportunity** – not a threat¹.
- Change that unlocks **new value**².
- The ability to convert ideas into **invoices**³.



Attributed source of innovation quotes: 1) Steve Jobs, 2) Jamie Notter, and 3) Lewis Duncan.

OUTLINE

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Additional investor information available at the Parkway Investor Hub:
<https://investorhub.pwnps.com>

PROBLEM: Impact of Extractive Industries

MINING

Unsustainable brine extraction creating community & environmental challenges.



MINING

Extensive wastewater generation, including waste brines and acid & metalliferous drainage (AMD).



ENERGY

Industrial wastewater produced as a result of oil production in Northern Alberta, Canada.



ENERGY

Waste brine ponds from coal seam gas (CSG) production in Queensland, Australia.



“
Globally significant **wastewater challenges**, impact sustainability of **extractive industries**.”

SOLUTION: Innovative Technologies

The Problem we are Solving

- We are focused on industrial, **mining** & **energy** industries.
- < 10% of industrial wastewater globally, is recycled.
- We believe **industrial process technologies are the answer.**

Our Process Technologies

- We own a **deep portfolio of proprietary** (including patented) **process technologies** for industrial wastewater treatment.
- Our process technologies:
 - Enable the processing of industrial wastewater to **recover valuable minerals, reagents and water.**
 - **Improve the sustainability** of industrial operations.
- Have the potential to disrupt and/or **impact the viability of major global industries.**

Development of Next-Generation Solutions

- Significant ongoing investment in R&D and commercialisation to advance range of proprietary process technologies including various undisclosed technologies.
- Ongoing efforts to continuously improve technologies towards achieving **best available technology (BAT)** status.

“

Innovative technologies provide an opportunity to **solve these problems, sustainably.**



Parkway Process Technologies (PPT) Capability Statement available for download here:

<https://pwnps.com/collections/parkway-process-technologies>

MARKET: Addressable Wastewater Markets

Key Markets

- Wastewater treatment opportunities
- < 10% of wastewater currently recycled
- Large and growing global markets

Challenges

- Major challenges impacting industry

PPS Opportunity

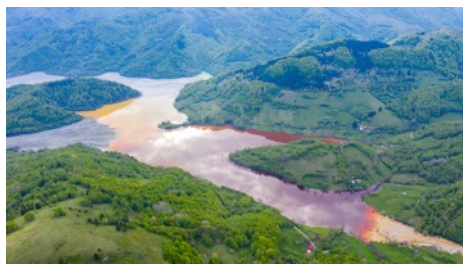
- Parkway Process Solutions (PPS)

PPT Opportunity

- Parkway Process Technologies (PPT)

Global Market Size

Mining & Energy



- Limited access to freshwater is driving need to recycle wastewater
- Wastewater storage is problematic
- Processing of waste is complex

- Projects require range of products and **conventional** solutions
- Solid-liquid separation options including chemistry as well as membrane-based approaches

- Projects require range of products and **next-generation** solutions
- Opportunity to recover economic quantities of products & reagents
- Product recovery funds treatment

> \$25 Billion / yr

Industrial Wastewater



- Access to freshwater is becoming more difficult, costly and uncertain
- Wastewater discharge is difficult
- Processing of waste is expensive

- Projects require range of products and **conventional** solutions
- Removal of contaminants and organics to meet wastewater discharge requirements

- Projects require range of products and **next-generation** solutions
- Opportunity to recover (and sell) and/or destroy contaminants, allowing subsequent discharge

> \$100 Billion / yr

Municipal & Desalination



- Wastewater storage and discharge is increasingly being scrutinised
- Conventional treatment can be complex due to salts and organics

- Projects require range of products and **conventional** solutions
- Removal of salts, nutrients and organics to meet wastewater discharge requirements

- Projects require range of products and **next-generation** solutions
- The requirement for zero liquid discharge (ZLD) is increasing with the objective of reducing volumes

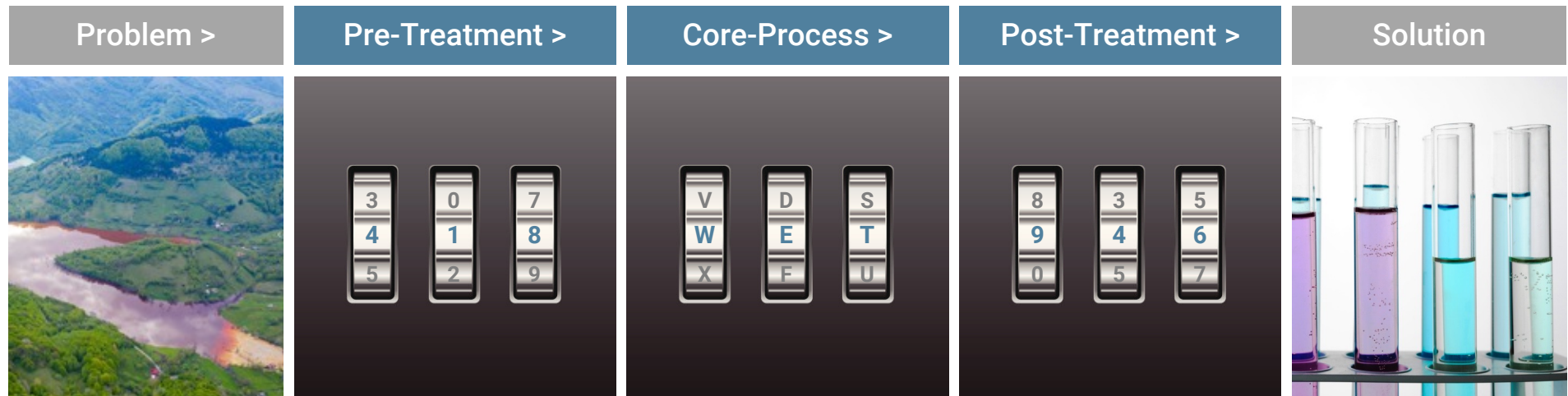
> \$25 Billion / yr

Market size estimates, in Australian dollars

TECHNOLOGY: Cracking the Code

Cracking the Process Technology Code

- Parkway is focused on **developing industry-wide solutions** (large markets) for some of the most difficult (complex and expensive) wastewater related problems facing extractive industries, such as the energy (oil & gas), and mining industries, globally.
- We are developing **proprietary process flowsheets** that are highly effective, in recovering both water as well as saleable products.



- Large scale issues as a result of legacy impacts from extractive industries.
- Large companies have often **exhausted conventional options**.
- Highly complex technical problems, **requiring an innovative approach**.



"There's a way to do it better – find it." Thomas A. Edison

- Parkway performs detailed **process simulation & piloting studies** in order to "crack the code".
- **Several conventional and proprietary technologies are integrated to develop an optimal solution.**
- As the technology solution provider, Parkway is strongly positioned to **capture share of value** creation.

Parkway Process Technologies – Proprietary Technology Portfolio

- Solution often involves the recovery of high-purity water, and the:
- Production of reagents and/or **industrial chemical products**.
- Substantial reduction and/or **elimination of waste volumes**.
- **Attractive financials.**

TECHNOLOGY: State-of-the-Art Capabilities

Process Technology Development

- Experienced **inhouse engineering team** with extensive process engineering and technology commercialisation capabilities.
- Portfolio of highly **innovative technologies** developed inhouse.
- Additional synergistic technologies acquired to consolidate technology portfolio into **robust technology-based platform**.

Pilot Plant Facilities

- **Successfully scaled-up key process technologies** through a series of pilot plant facilities to validate process performance.



State-of-the-Art Process Simulations

- Parkway has developed **extensive process simulation models** that support a range of technology development, optimisation and techno-economic evaluation related objectives.

Strategic Partnership



- Cutting-edge water and wastewater research conducted by Victoria University's Institute for Sustainable Industries & Liveable Cities (ISILC).
- ISILC researchers are **recognised global leaders** in a range of key research areas, relevant to Parkway.
- ISILC have **extensive water research capabilities** including laboratory facilities with the latest analytical equipment.
- Parkway has been collaborating with Victoria University since 2015 and acquired a broad portfolio of intellectual property.
- Jointly **secured competitive funding** from the Australian Research Council (ARC) under various grant schemes.
- Parkway has co-located piloting and research facilities, including research staff, at the nearby ISILC campus.
- Several Parkway staff have honorary researcher status with ISILC, Victoria University, with Parkway MD Bahay Ozcakmak, an Adjunct Associate Professor since May 2020.

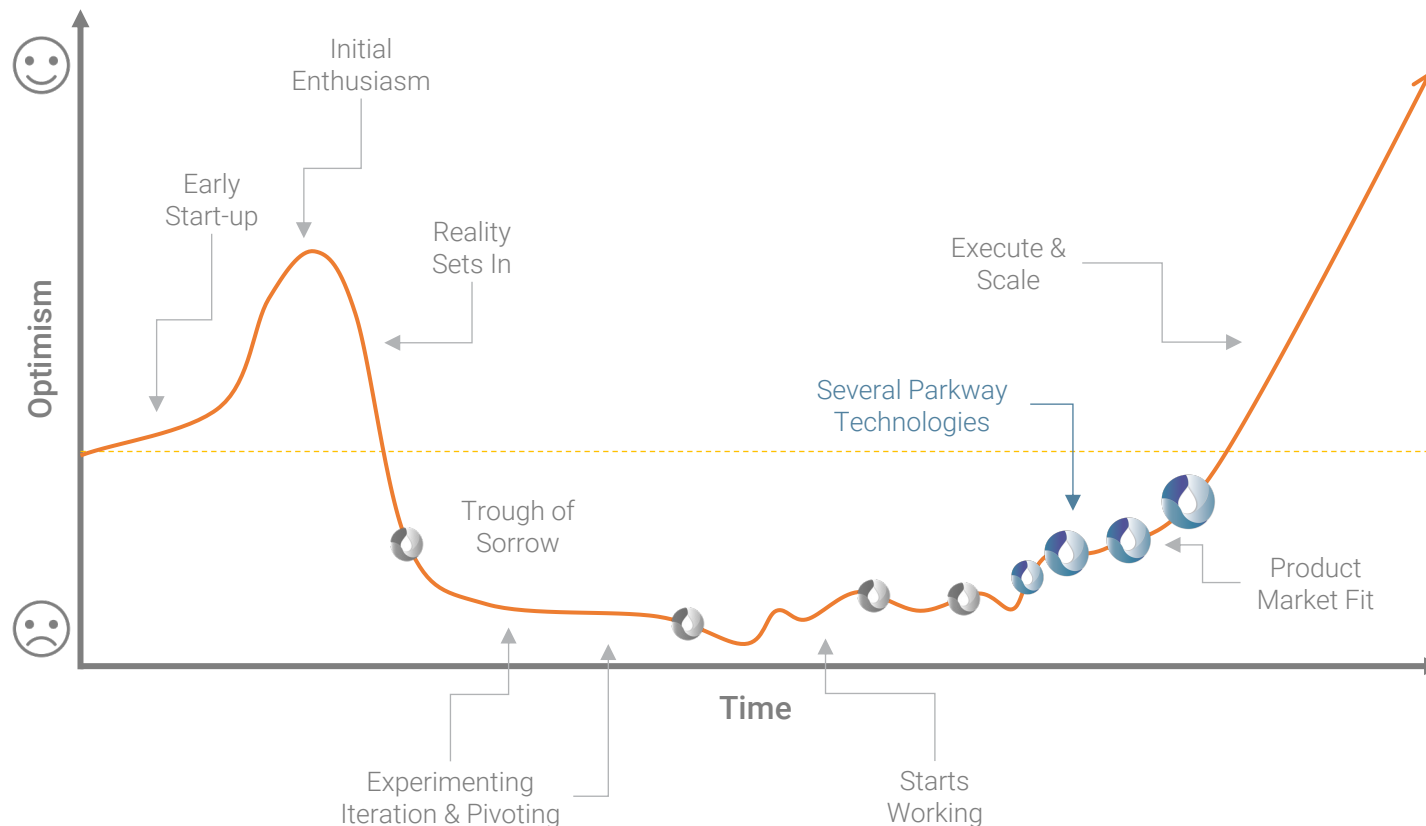
Additional Capabilities

- Parkway is exploring opportunities with the University of Queensland, specifically focused on CSG brine impurities.
- Parkway recently secured facility to establish **Centre for Brine Technologies** to support technology commercialisation.

TECHNOLOGY: Product Commercialisation Journey

Simplified Technology Start-Up Commercialisation Journey

- THE CHALLENGE: Often a long journey with many uncertainties and obstacles to overcome.
- THE REWARD: Technologies that succeed become **highly valuable**, creating significant opportunities.



The Journey

- The experimentation, iteration and pivoting is a key phase of the tech commercialisation journey.
- Resembles PWN SP chart.

Execute & Scale

- **Product Market Fit**
 - Critical validation milestone before product-technology can be rolled-out.

Project Execution

- **Building technology delivery capability.**
- Go-to-market strategy needs to align with market requirements.
- **Scale (Grow)**
 - Roll-out rapidly to maximise value.

TECHNOLOGY: Industrial Commercialisation



Target Markets

- Large industrial markets (energy & mining industry).
- **High-value applications** (large projects).
- Well-resourced clients (**tier-1 industrial clients**).
- Urgency to act (financial, strategic & ESG related drivers).

Go-To-Market Strategy

- Scale-up internal process technology capabilities, from process simulation and piloting, through to studies for execution phase.
- Launched industrial water treatment business, Parkway Process Solutions (PPS) in July 2021, to **build internal capabilities** and provide access to products and services.

Business Model

- Technology licensing is key monetisation pathway.
- Focus on large projects providing substantial advantages:
 - Enables **10 - 20% technology licensing fee** to be embedded into proprietary process solution.
- **Potential to toll-treat** and/or build-own-operate (BOO):
 - Smaller plants (\$3m - \$20m CAPEX), if projects;
 - Generate high ROE (>30% pa)

Global Strategic Partnership



- Worley is a **major global engineering company**, with a mission focused on *"delivering a more sustainable world"*.
 - Key Markets, Energy, Chemicals & Resources.
 - Operates in 46 countries (> 25,000 current projects).
 - > 50,000 people.
- Worley provides engineering, procurement & construction, management (EPCM) related services to a diverse range of clients, many of which are **Parkway's target clients**.
- In May 2020, Parkway entered into a Global Strategic Partnership with Worley to **commercialise key technologies**.
- In February 2022, **partnership extended** to incorporate additional technologies, **targeting the CSG industry**.

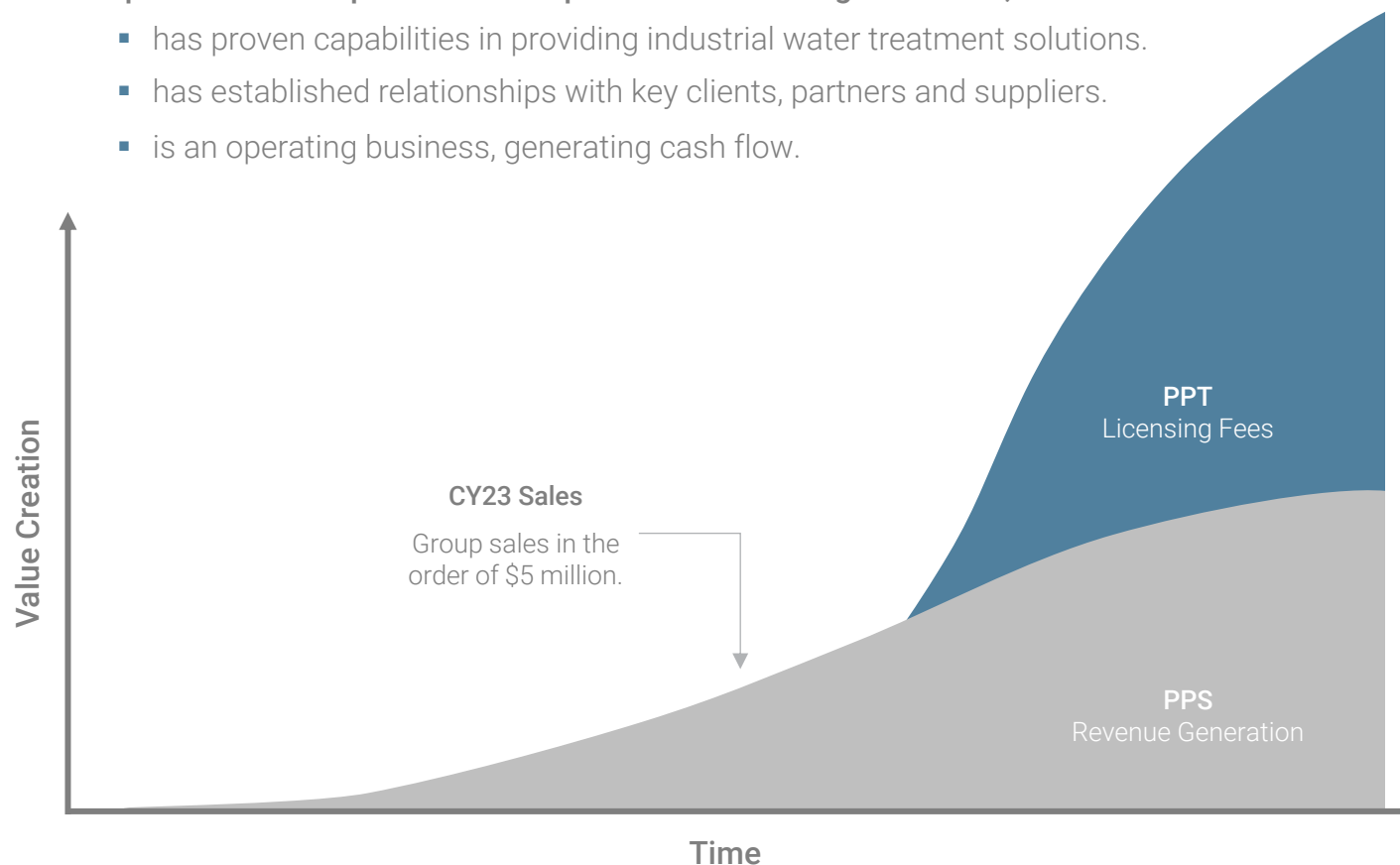
Additional Capabilities

- Parkway established relationships with **leading global OEMs** supplying key equipment for water & wastewater treatment.
- Parkway's PPS business provides immediate access to large range of industrial equipment suppliers at wholesale prices.
- Investing in building **strategically important** inhouse:
 - ▶ **technology delivery capabilities.**

TECHNOLOGY: Commercialisation Launchpad

Methodically Executing Commercialisation Strategy

- PPT is targeting **large high margin projects** with **recurring revenues**, in key target markets.
- **PPS provides launchpad for PPT to penetrate these target markets, as PPS:**
 - has proven capabilities in providing industrial water treatment solutions.
 - has established relationships with key clients, partners and suppliers.
 - is an operating business, generating cash flow.



Parkway Process Technologies (PPT)

Because of the inherent advantages of innovative process technologies, PPT is likely to be able to create and capture significant value.

Typical Advantages:

- higher margin (> 50% ROE)
- recurring revenues (earnings)

Parkway Process Solutions (PPS)

The PPS business is providing a strong foundation in terms of capabilities to support growth of PPT.

- typical margin (~30% GP)
- Potential to **grow PPS business** through M&A, if the opportunity is **accretive, and provides capabilities.**

IMPORTANT INFORMATION

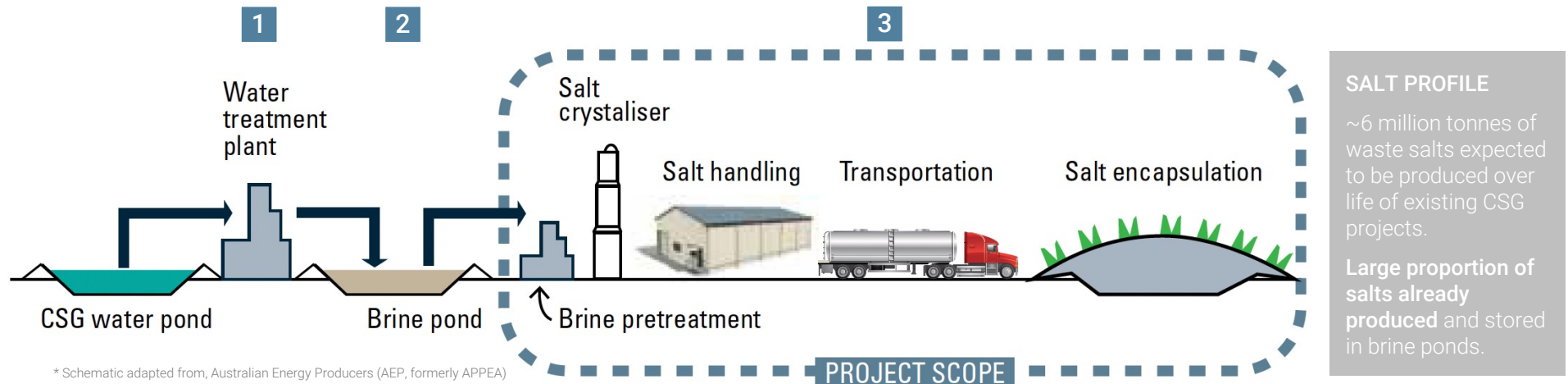
This section of the presentation includes a range of estimates regarding potential market opportunities, various financial estimates relating to capital and operating expenditure (CAPEX and OPEX, respectively) as well as potential revenue generation opportunities. Whilst reasonable care has been taken in the preparation of any estimates, these estimates nonetheless represent a range of risks and uncertainties. It should be noted, that this information, including any estimates are intended as an indicative guide only, and should not be relied upon for any specific purpose, including any investment related purposes. Further cautionary statements, including details regarding forward-looking statements, are outlined in the *Disclaimer* section at the beginning of this presentation.

All dollar (\$) amounts in this section of the presentation refer to Australian dollars, in real terms (in 2023 Australian dollars).

QLD CSG OPPORTUNITY: The Challenge

Industry Requires Permanent Solution

- The Queensland coal seam gas (CSG) industry has **invested >\$100 billion in developing substantial gas production** capacity.
- Production of CSG derived gas, **results in large volumes of waste brine production**, stored in brine ponds on an “interim” basis.
- Industry, through AEP*, has explored range of options, over many years, resulting in only 1 “viable” option, namely “salt encapsulation”.
- Salt encapsulation is expensive, complex, represents **unacceptable environmental risks** and faces significant community resistance.



1. Water Treatment Plants

- x16 large capacity water treatment plants in operation.

2. Regulated Brine Ponds

- x36 large brine ponds, storing waste CSG derived brines.

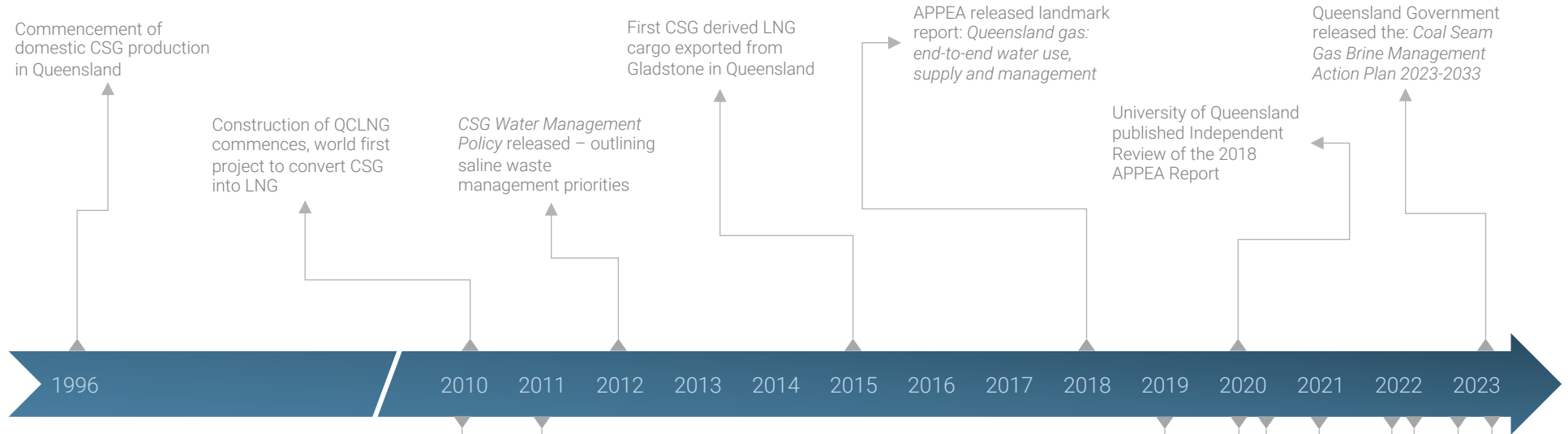
3. Proposed Industry Solution (Base Case), involves:

- Transporting brine to a brine concentrator and salt crystalliser.
- Crystallisation of waste salts then need to be transported.
- Waste salts to be disposed in a regulated waste facility (RWF).
- Fees payable to RWF operator as well as government levies.

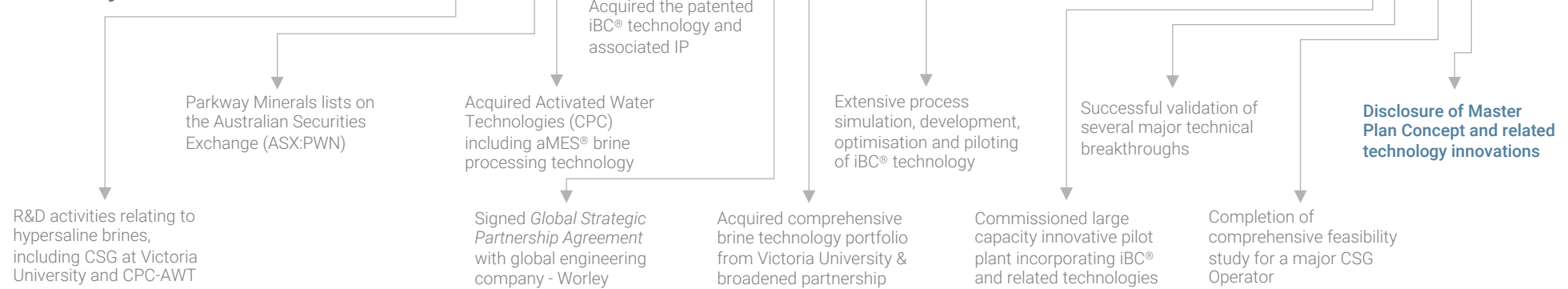
QLD CSG OPPORTUNITY: Timeline of Key Milestones



CSG Industry Milestones



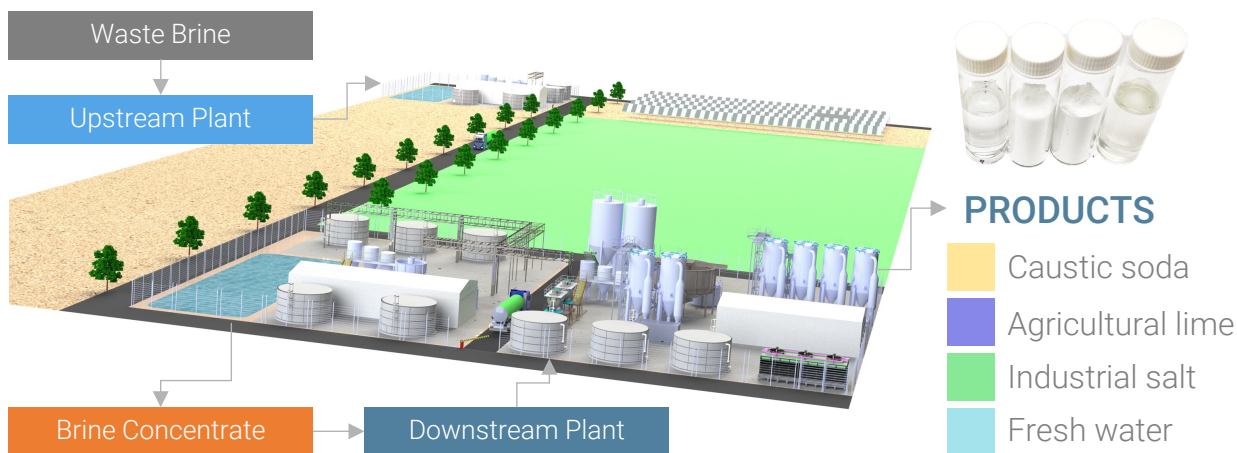
Parkway Related Milestones



QLD CSG OPPORTUNITY: QBS Master Plan

Development of Technology-Based Solution

- Parkway recently announced it is **viable to treat concentrated CSG derived brines** through a proprietary process technology platform developed by PPT.
- Parkway process **converts waste brine into valuable industrial chemical products**.
- Successfully performed a detailed **feasibility study for the most advanced CSG Operator**, to assess the technoeconomic advantages of the technology platform.



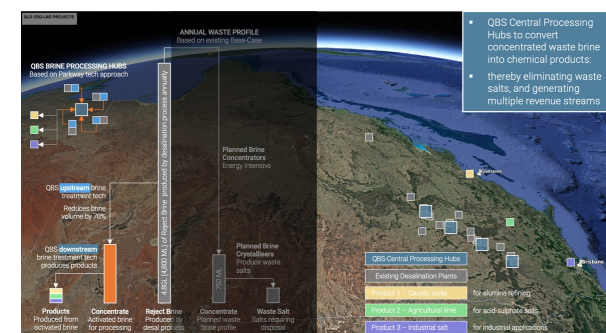
Master Plan – Key Advantages

- Strategy to provide a **complete and permanent industry-wide solution**.
- Only viable option to **convert waste brine into products**, instead of disposing salts.
- Potential to **create > \$15 billion in value** over the life of existing CSG-LNG projects.

Master Plan Presentation



Industry-Wide Solution

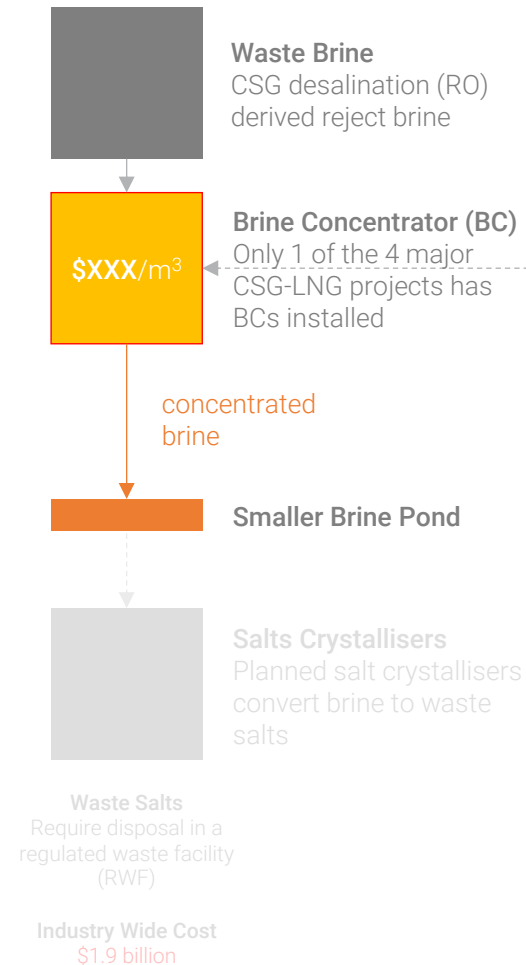


Master Plan Presentation

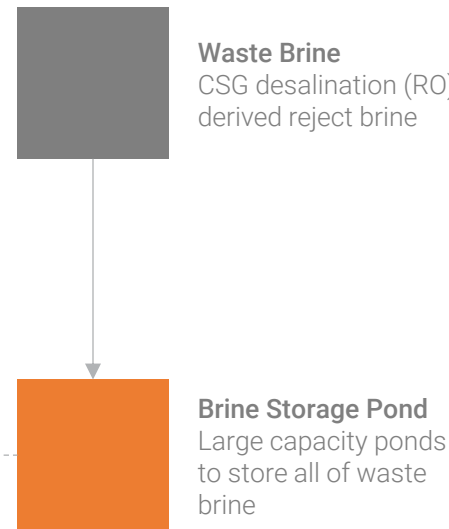
Parkway Investor Hub:
<https://investorhub.pwnps.com/announcements/4372527>

QLD CSG OPPORTUNITY: Upstream Solution

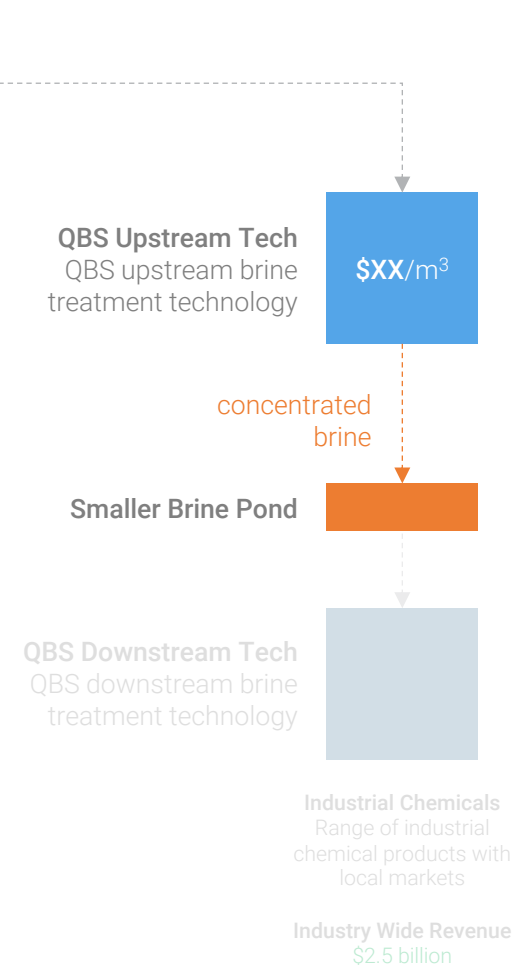
Conventional Approach (Project 1 out of 4)



Current Situation (3 out of 4 Projects)



The Future (Parkway) (QBS Upstream Solution)



Client Benefits

- Faster, lower-cost and more sustainable brine concentration option.
- Interim solution, towards permanent downstream solution.

QLD CSG OPPORTUNITY: Near-Term Applications

Overview

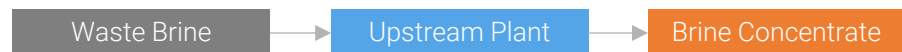
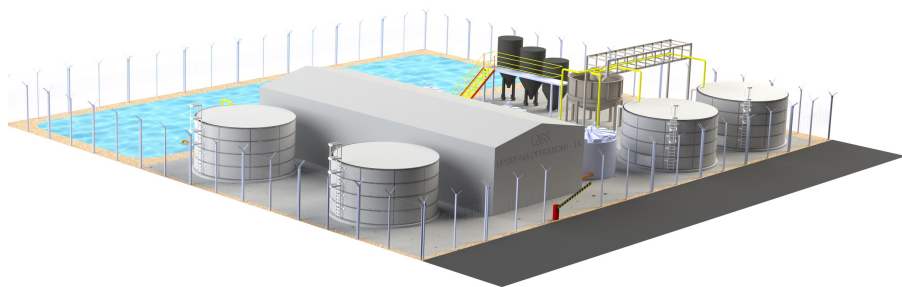
- The Parkway upstream technology package enables the **more efficient concentration** and processing of CSG waste brines.

Advantages

- **Modular design** provides opportunities for staged and cost-effective deployment to **align with project requirements**.
- Provides onsite brine concentration (~70% volume reduction).
- Significantly lower cost compared to conventional processes.

Technology

- Based on **proprietary upstream process technology package** developed by Parkway.
- Range of interstate and major international opportunities.



Productisation of Technology

- Based on **modular containerised system** for rapid deployment.
- ▶ **Offsite Fabrication - Enhanced QA/QC and roll-out efficiencies.**

Near-Term Toll-Treatment Opportunity

- Opportunity for Queensland Brine Solutions (QBS, a Parkway subsidiary), to **provide solution on a toll-treatment basis**.
- **Opportunity for ~12 - 24 systems** in Queensland CSG industry.

Indicative Financial Metrics* (Per System)

- CAPEX: \$8 - 12 million (project specific).
- OPEX: low, significantly (< 70%) less than main alternative.
- Revenue: high, despite QBS charging (< 50%) of alternatives.
- Margin: **> \$5 million/yr** (estimated operating margin).

Client Benefits

- Fast and effective solution, at a highly attractive price.
- No CAPEX (alternative brine concentrator CAPEX > \$250 m).
- Option to **integrate with downstream QBS technology package** (potentially on-site, to convert brine concentrate into products).

* - All dollar (\$) amounts refer to Australian dollars, in real terms (2023). Various financial estimates, including but not limited to CAPEX, OPEX and revenue have been derived by Parkway from a range of internal and industry sources and indexed to account for various factors including industrial inflation. This information is intended as a guide only and should not be relied upon for any specific purpose. Further details, refer to the *Disclaimer* section in this presentation.

KEY MILESTONES: Commercialisation Focus

	CY2023		CY2024				CY2025	
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Master Plan Related								
Downstream: Major Advanced Project	Client Review	Pre-FEED	Pre-FEED	Client Review	FEED	FEED	FEED	Ready for FID
Upstream: Large-Scale Pilot	Process design	Long-lead items	Installation	Pilot testing	Supporting BD	Pilot testing	Supporting BD	Supporting BD
Upstream: Commercial Plant	Process design	Process engineering	Plant engineering	Plant engineering	Module fabrication	System integration	Deployment ready	Deployment ready
Technology Development								
Centre for Brine Technology	Planning	Secure facility	Preliminary fit-out	Pilot testing	Pilot testing	Tech development	Tech development	Tech development
Tech Focus: Master Plan	Upstream pilot	Upstream pilot	Upstream pilot	Next-gen tech	Next-gen tech	Support roll-out	Support roll-out	Support roll-out
Tech Focus: Acid Mine Drainage	Process design	Process design	Process engineering	Plant engineering	Module fabrication	System integration	Deployment ready	Deployment ready
Tech Focus: Battery Precursor	Market validation	Process review	Process design	Process engineering	Plant engineering	Module fabrication	System integration	Deployment ready
Technology Delivery								
Technology Delivery Capability	Define requirements	Procurement	Workshop fit-out	Workshop works	Module fabrication	Expand Capabilities	Expand Capabilities	Expand Capabilities
Strategic & Business Development								
Strategic Engagement	Ongoing engagement with industry (large energy & mining companies, including representative industry associations such as AEP), Queensland Government (including departments responsible for regulating coal seam gas industry), EPCM partners (Worley and others), strategic partners & investors and research partners (primarily VU and negotiating with University of Queensland).							

KEY DEFINITIONS: BD: Business Development, FEED: Front-End Engineering Design, FID: Final Investment Decision.

This information is intended as a guide only as timelines are likely to change due to a range of factors including priorities, and therefore should not be relied upon for any specific purpose. Further details, refer to the *Disclaimer* section in this presentation.

CORPORATE: Capital Structure

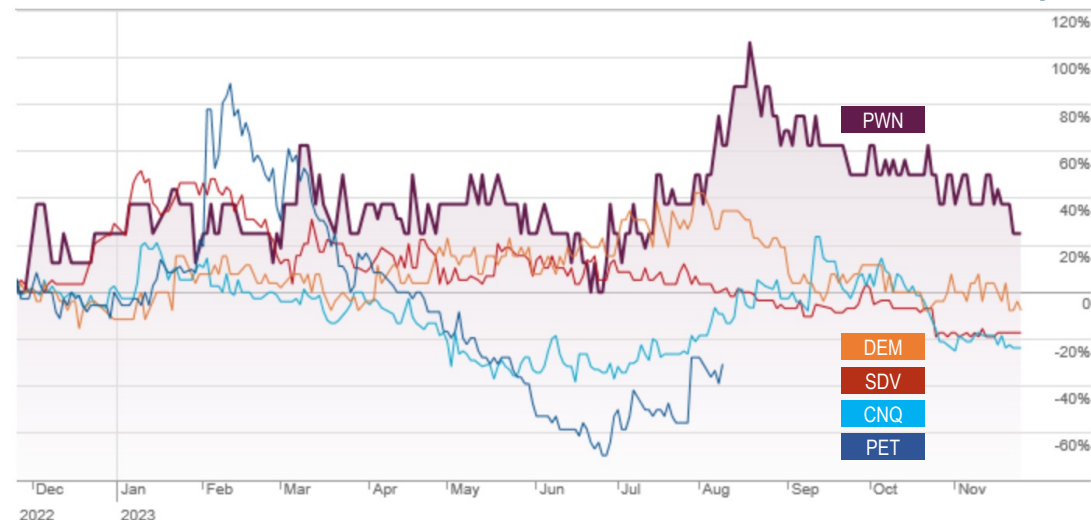
Capital Structure	Current
Ordinary Shares (PWN) on issue	2,513,224,966
12-month Trading Range	\$0.007 - \$0.018
Market Capitalisation (at \$0.010)	\$25 million
Unlisted Options (\$0.019, 28 Jul 2024)	245,912,785
Unlisted Options (\$0.020, 16 Dec 2024)	15,000,000

Major Shareholders	%
BNP Paribas Nominees / Deutsche Börse	9.3%
Holdings associated with Group MD	8.8%
Holdings associated with Jack Yetiv	8.5%
BNP Paribas Noms / EU & Institutional	8.2%
Remainder of Top 20	17.2%
Top 20	52%

Funding	\$
Debt	nil
Cash (at 30 Sep 2023, excl. grants)	\$4.9 million
Cash (at 30 Sep 2023)	\$4.9 million
Inventory (carrying value at 30 Sep 2023)	\$1.8 million

Additional investor information available at the Parkway Investor Hub: <https://investorhub.pwnps.com>

Relative 12-Month Share Price Performance – ASX Peer Group



- Parkway (PWN) has made **impressive progress in CY2023**, despite market reaction.
- Other than PET (entered administration), peer group are great companies.

Recent AFR Small-Cap Commentary (23 Nov 2023) [FINANCIAL REVIEW](#)

- "The S&P/ASX Small Ordinaries Index has dropped 23.3 per cent to 2708.6 points since the end of 2021 as the fastest interest rate tightening cycle in a generation erased confidence in a sector that feeds off animal spirits and the lure of huge returns."
- "Small caps have been smashed because liquidity was pulled out as interest rates climbed and people didn't want to get caught in small companies if there's a recession," Ophir Asset Management co-founder Andrew Mitchell says. "If the Fed cuts rates, say in May or June, you could take the view **small caps rip from these low levels**," he says.

Australian Financial Review (AFR): <https://www.afr.com/markets/equity-markets/nine-small-cap-stocks-tipped-to-soar-in-2024-20231113-p5ejn5>

CORPORATE: An Experienced Team



Stephen van der Sluys
Non-Executive Chairman

Board of Directors

- Highly experienced board with **significant domain expertise** in industrial, energy, mining, waste and technology sectors.
- Strong corporate experience including M&A.



Bahay Ozcakmak
Group MD & CEO

- Mr Stephen van der Sluys
 - Investment banker, ex-Citi, JPM, CIBC, ED of Queensland Nickel (QNI), JRV.



Penny Creswell
Non-Executive Director

- Mr Bahay Ozcakmak
 - Significant industrial technology commercialisation expertise.
 - Leading technology commercialisation and corporate development strategy.



Ayten Saridas
Non-Executive Director

- Ms Penny Creswell
 - Experienced senior lawyer, currently Head of Environment and Regulatory Compliance at Cleanaway, ASX:CWY.
- Ms Ayten Saridas
 - Experienced CFO/finance executive, ex-AWE, CRN, OSH, STO, WOW.



Mike Hodgkinson
Chief Financial Officer

Commercial & Technical

- Extensive inhouse **commercial & technical expertise** underpins:
 - Process technology development program, and
 - Technology commercialisation related activities.



Raza Hasan
Head of Engineering

- Mr Mike Hodgkinson
 - Broad corporate and technology commercialisation experience.



Dr Rudy Dubbelboer
Process Innovation Engineer

- Mr Raza Hasan
 - Senior roles, including as principal process engineer with leading global EPC/M & chemical companies.



Anthony Gunadi
Water Treatment Specialist

- Dr Rudy Dubbelboer
 - Senior process engineer with global EPC/M, chemical & tech companies.
- Mr Anthony Gunadi
 - Senior brine treatment specialist with extensive EPC/M experience.

CORPORATE: Generating Significant Traction

Building Momentum

- Parkway has developed capabilities to successfully deliver a range of **industrial solutions for tier-1 global companies**.
- Progressively built a **high-quality** and growing **client base**.

ISO Certifications

- Parkway achieved and maintains triple ISO certification.



Memberships

- Parkway is a member of the Initiative for Responsible Mining Assurance (IRMA) and has provided early engagement.



Approved Vendor

- Parkway is an **approved vendor** for many major companies.

Energy Clients:

- Leading global energy companies.



Mining Clients:

- Leading Australian and global mining companies.



Industrial Clients:

- Leading Australian and global F&B and industrial companies.



CORPORATE: Summary

Very Large Addressable Markets

- The wastewater treatment opportunities in the global energy, mining and industrial sectors, represent **multi billion dollar opportunities**.
- Strong economic, regulatory and **ESG drivers supporting change**.

Innovative Technologies

- Our **portfolio of innovative technologies** enable us to create value by:
 - Reducing wastewater volumes (cost savings), and
 - Recovering valuable products (**generating revenue**).

Executing Strategy

- Building an **industrial water treatment technology company**, by concurrently **generating revenue & commercialising technology**.
- Recent piloting and feasibility studies **confirm product-market fit**.
- **Near-term opportunities to strategically roll-out technology**.

▶ **Building technology delivery capabilities.**

Experienced Team

- Strong corporate, strategic, M&A and technology experience.
- Focused team **methodically executing** corporate strategy.
- Owner mindset across business, aligns with shareholders.

“
Technology
commercialisation at
major inflection point,
in key markets.”

An aerial photograph of Lord's Table Mountain in Queensland, Australia, during a sunset. The mountain's flat top is visible, surrounded by a vast, hilly landscape under a sky with soft, orange and yellow clouds. The foreground shows the rugged, rocky edges of the mountain's plateau.

“

Over the past year we have worked incredibly hard to achieve our strategic objectives and **position Parkway for transformational growth.**

Thank you for joining us, on this journey.

BAHAY OZCAKMAK
GROUP MANAGING DIRECTOR & CEO
PARKWAY CORPORATE LIMITED



Parkway

CORPORATE LIMITED

Building an advanced
**industrial water treatment
technology company.**
