



ENRC FY25 Performance Snapshot



ENR Sector Performance Snapshot



Overall sector

\$3,797M | **▲ 8%**
Revenue | Growth

G2000 Accounts

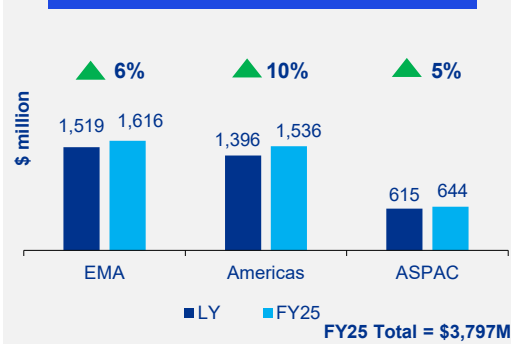
\$1,585M | **▲ 2.0%**
Revenue | Growth

Global Accounts

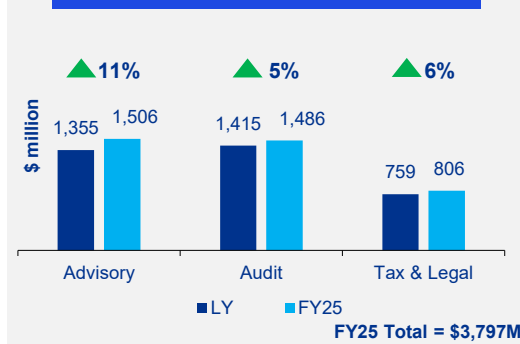
\$623M | **▲ 0.4%**
Revenue | Growth

- In FY25, ENR sector recorded a growth of 8% and achieved 100% of the FY25 target of \$3.8B. Growth was seen across all regions and functions. Amongst sub-sectors, mining led growth, followed by P&U.
- In FY25, the top 10 countries contributed about 74% to the global revenue, with US contributing about 40%.

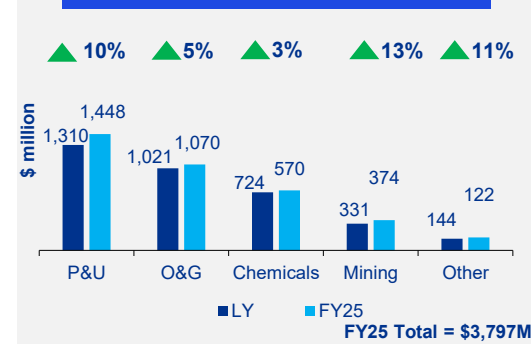
Revenue by Region (\$M)¹



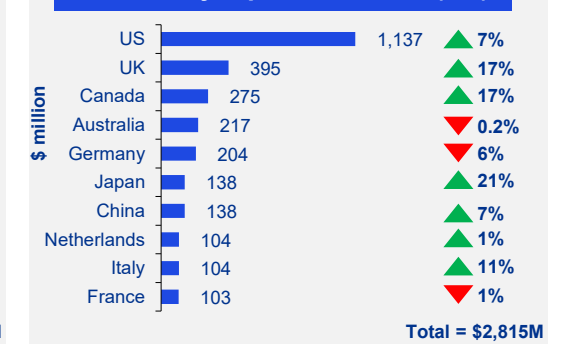
Revenue by Function (\$M)¹



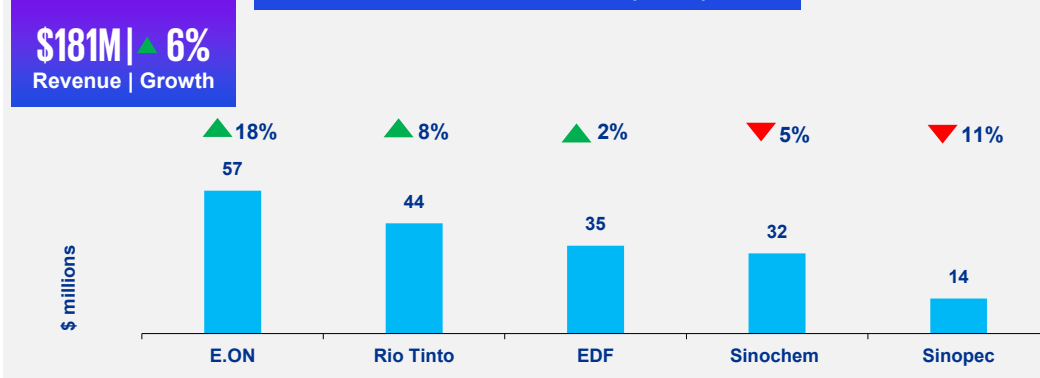
Revenue by Subsector (\$M)¹



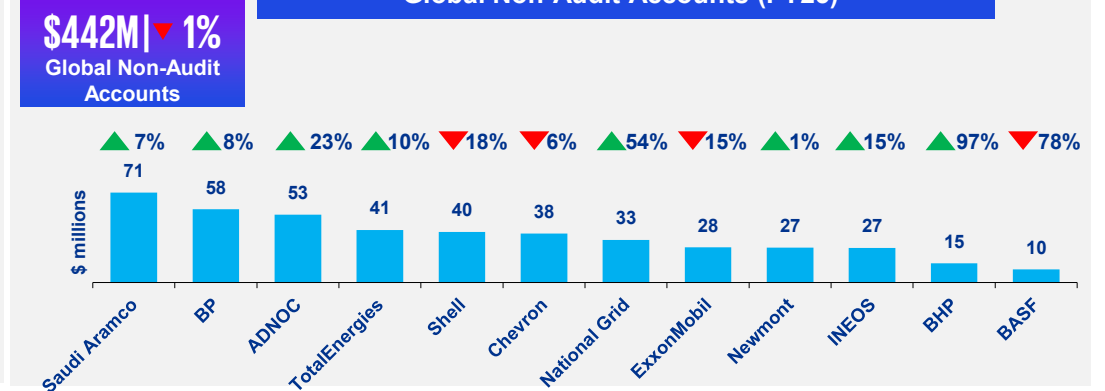
Revenue by top 10 countries (\$M)¹



Global Audit Accounts (FY25)³



Global Non-Audit Accounts (FY25)³



Note: Since some of the bookings are tagged to multiple FoPs, there may be some double counting.

Source: 1. Frozen FW Quarterly report (Excel report shared); 2. [Bookings](#) dashboard as on 20 Nov 2025; 3. [GSH Overview](#) dashboard as accessed on 20 Nov 2025



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Pipeline and outcome analysis (FY25)

Total ENRC Bookings

\$2,283M

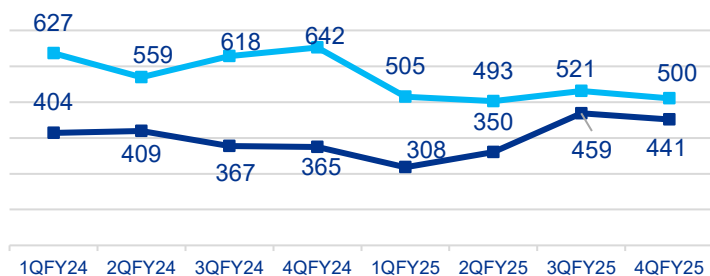
Win rate

39%

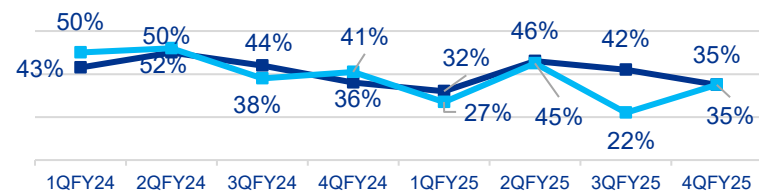
Bookings by Sector FoP (\$M)²

SFOP	(\$M) ¹
TechTonic	141
Lead the [Energy] Transition	109
Cyber Secure	91
AMORE	76
Tax Transformation	66
AI for Energy	33
Deals & Strategy	11
Shared Services	0.3
Other and Undefined	1,755
Total	2,283

Average Pipeline Size (\$'000)

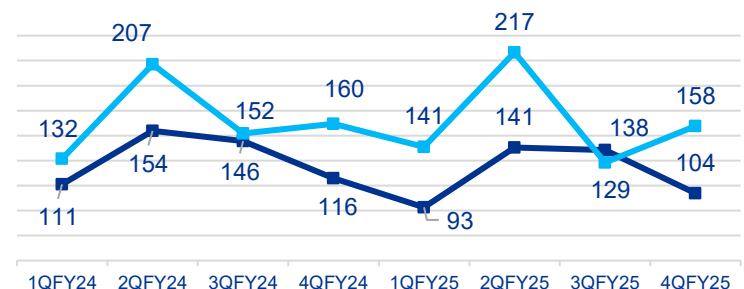


Win rate – Overall

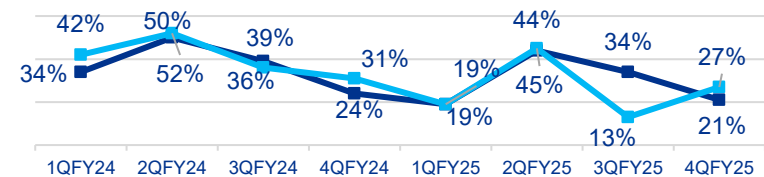


ENRC Sector Global Accounts

Average size of Wins (\$'000)



Win rate – Opportunities >\$1M



Bridge campaign alignment by country and region

Australia seems to have a robust pipeline aligned to bridge campaigns, with Netherlands reporting alignment across majority of its bookings. However, better alignment is required with the MF markets teams to get a better visibility of the pipeline and bookings.

(US\$M)

(US\$M)

<6.0%

6.0%-25.0%

26.0%-50.0%

50.0%>

Regions/ Countries	FY25 Revenue ²	YTD Growth ²	Pipeline ¹	Bookings ¹	AI for Energy ¹		Cyber Secure ¹		TechTonic (SAP) ¹		AMORE ¹		Grand Total ¹	
					Pipeline	Bookings	Pipeline	Bookings	Pipeline	Bookings	Pipeline	Bookings	Pipeline	Bookings
AMR	\$1,536	-	\$1,746	\$1,362	3%	1%	6%	3%	13%	9%	6%	4%	28%	17%
US	\$1,137	7%	\$1,405	\$983	4%	1%	7%	4%	14%	11%	7%	4%	32%	21%
Canada	\$275	17%	\$195	\$238		1%		1%	\$0	1%		1%	\$0	4%
Brazil	\$66	28%	\$80	\$63			1%	1%	10%	16%	1%	9%	12%	26%
Mexico	\$30	(5%)	\$44	\$33						9%				10%
ASPAC	\$644	-	\$279	\$334	2%	2%	17%	1%	13%	1%	5%	1%	38%	5%
Australia	\$217	(0.2%)	\$181	\$124	4%	7%	25%	5%	20%	5%	7%	2%	57%	18%
Japan	\$138	20.9%	\$58	\$97					1%				1%	
China	\$138	6.9%	\$2	\$3			55%	7%					55%	7%
Korea	\$58	14.0%	\$9	\$57		1%			2%				2%	1%
Singapore	\$44	(2.2%)	\$10	\$10			4%	3%	2%		1%	6%	8%	9%
EMA	\$1,616	-	\$990	\$588	1%	1%	8%	4%	5%	8%	9%	3%	24%	15%
UK	\$395	17%	\$466	\$83	1%		3%	13%	3%	3%	6%	10%	12%	26%
Germany	\$204	(6%)	\$148	\$84	1%	3%	12%	4%	1%	1%			14%	8%
Netherlands	\$104	1%	\$17	\$44	2%		16%	4%	6%	55%	2%	7%	27%	67%
Italy	\$104	11%	\$4	\$33		1%								1%
France	\$103	(0.7%)	\$41	\$52			8%	8%	17%	18%	2%	1%	28%	26%

Note: 1) Pipeline is as on 20th November 2025 and Booking are for FY25. 2) Rounding: All totals are calculated before rounding, which can lead to numbers expressed to one decimal place appearing not to add up.
Source: KICR report Sep 2025, [Bookings and Pipeline](#) dashboard as accessed on 24 Nov 2025

FY26 Account planning and Bridge Campaign Alignment

~80% of FY26 booking potential is powered by the Bridge Campaigns, showcasing stronger alignment between account priorities and sector strategies

Account	ENR - AI for Energy	ENR - Asset Management and Operational Excellence (AMORE)	ENR - Cyber Secure	ENR - Deals & Strategy	ENR - Lead the [Energy] Transition	ENR - Tax Transformation	ENR - TechTonic	Shared Services	Other Sector Activities	Total
ADNOC									\$0.0M	\$0.0M
Anglo American						\$0.5M				\$0.5M
BASF			\$0.4M	\$1.0M		\$0.5M			\$0.9M	\$2.7M
BHP Billiton	\$2.0M	\$11.0M	\$3.0M	\$1.0M	\$0.6M	\$3.0M		\$2.0M	\$0.0M	\$22.6M
BP			\$8.0M	\$4.0M		\$6.5M	\$1.0M	\$19.5M	\$2.0M	\$41.0M
Chevron	\$1.0M	\$3.5M		\$1.6M	\$0.0M	\$17.4M		\$8.0M	\$6.4M	\$37.8M
ExxonMobil	\$1.2M		\$1.2M	\$0.0M	\$13.2M	\$1.2M	\$1.2M		\$0.0M	\$18.0M
Global Power & Utilities Cluster	\$1.9M	\$7.7M	\$5.4M	\$6.0M	\$2.1M	\$1.1M	\$4.8M	\$5.0M	\$0.4M	\$34.2M
INEOS			\$0.2M	\$3.5M		\$25.0M			\$0.7M	\$29.4M
National Grid		\$7.5M	\$0.0M	\$1.5M	\$0.0M	\$1.0M	\$9.0M		\$6.7M	\$25.6M
Newmont Corporation		\$1.9M	\$0.0M	\$1.6M	\$0.2M	\$2.6M	\$1.8M	\$3.4M	\$0.6M	\$12.0M
PTT Public Company Limited	\$1.0M	\$2.0M		\$1.5M	\$0.5M	\$3.5M				\$8.5M
Saudi Aramco	\$25.0M	\$10.0M	\$14.0M	\$14.0M	\$5.0M	\$15.0M		\$3.0M	\$15.0M	\$101.0M
Shell	\$30.0M			\$3.0M		\$10.0M		\$15.0M	\$2.0M	\$60.0M
Symrise AG							\$0.6M			\$0.6M
TotalEnergies		\$1.2M		\$6.8M	\$1.0M	\$12.6M	\$11.0M		\$11.2M	\$43.8M
Vale		\$0.8M	\$0.4M	\$0.5M	\$0.6M	\$0.5M	\$0.1M		\$1.7M	\$4.5M
Total	\$62.1M	\$45.5M	\$32.5M	\$46.0M	\$23.1M	\$100.2M	\$29.5M	\$55.8M	\$47.5M	\$442.2M

Note: [Overview - FY26 Planning In-Flight Overview - Power BI](#) dashboard as accessed on 24 Nov 2025

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