

Welcome To The Columbia Monthly Customer Update Via Microsoft Teams!

Participants will be in “listen only” mode throughout the presentation

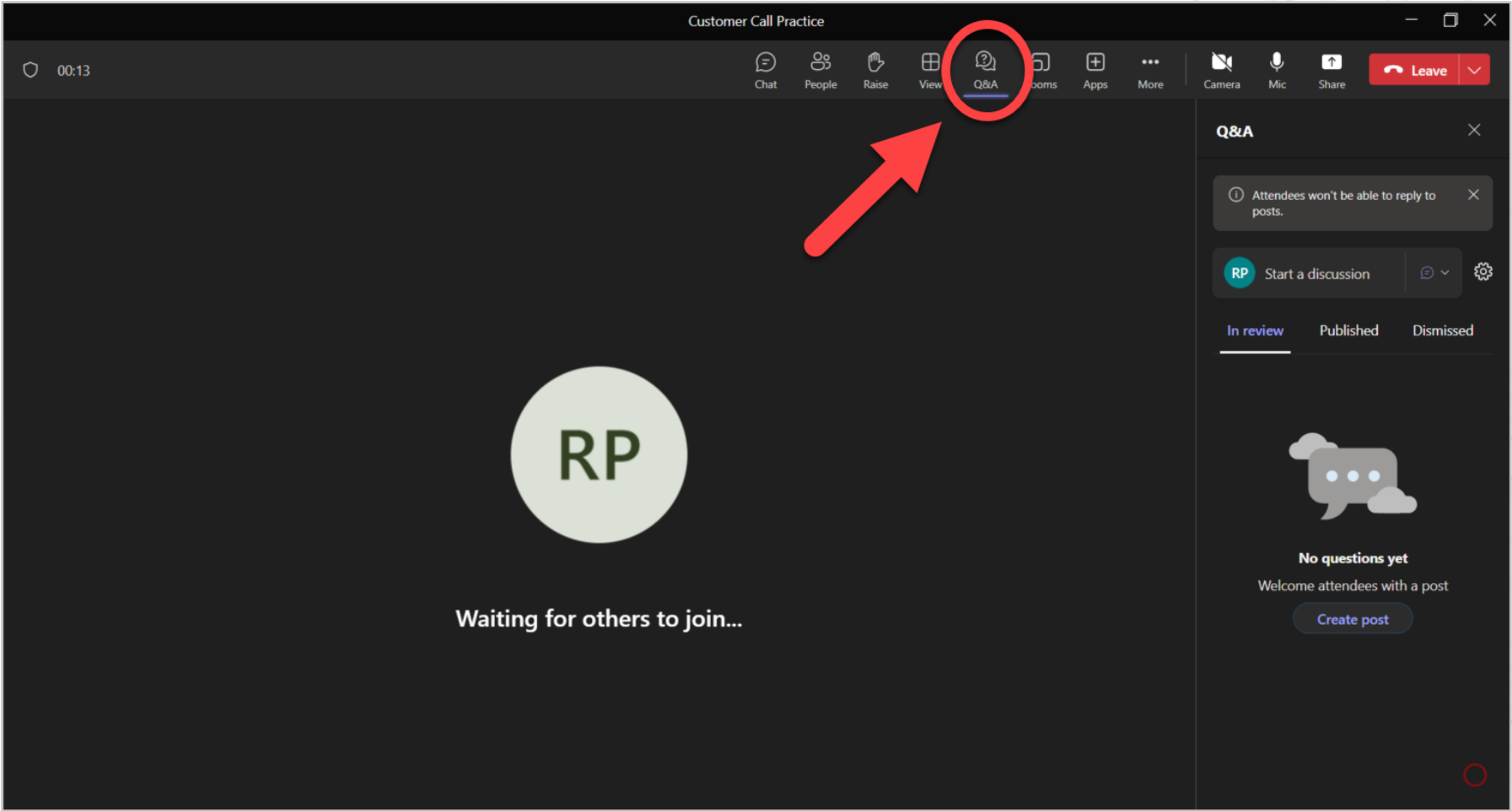
You do not have to advance the slides, they will be advanced by the facilitator

Questions will be at the end of the presentation. You can type a question related to the presentation material during the presentation or at the end of the Q&A session when announced. Please click the Q&A icon at the top of the screen to access the chat functionality.

Thank you for your patience, we will begin shortly!



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Columbia Pipelines Monthly Customer Update

AUGUST 21, 2025



Safety Moment

- ❖ According to the National Safety Council, the month of August is back to school safety month! Back to school means sharing the road.
- ❖ School buses are making frequent stops, kids are crossing the road on their bikes, and hurried parents are dropping their kids off before work. There is never a more important time for drivers to slow down and pay closer attention than when children are present.

To learn more, visit:

[Back to School Safety Checklist - National Safety Council](#)



» Young Pedestrians

Many school-related accidents involve children 4 to 7 years old. Avoid blocking crosswalks at red lights and watch for blinking flashers in school zones.



» School Buses

Allow for a greater following distance when behind a school bus. Never pass a bus from behind; it is illegal in all 50 states to pass a school bus that's stopped for children.



» Bicyclists

Watch for cyclists coming out of driveways and making quick turns. Be mindful of cyclists turning in front of you without signaling, especially children.



Agenda

1. TCO Storage Update

Shane Long – Manager, Operations Planning

2. Market Outlook

Diana Roberts - Optimization, Storage, and Transportation

3. Construction Maintenance

Dillon Schoolcraft - Customer Services

4. News from Customer Service

Cindy Burnette – Manager, Customer Services

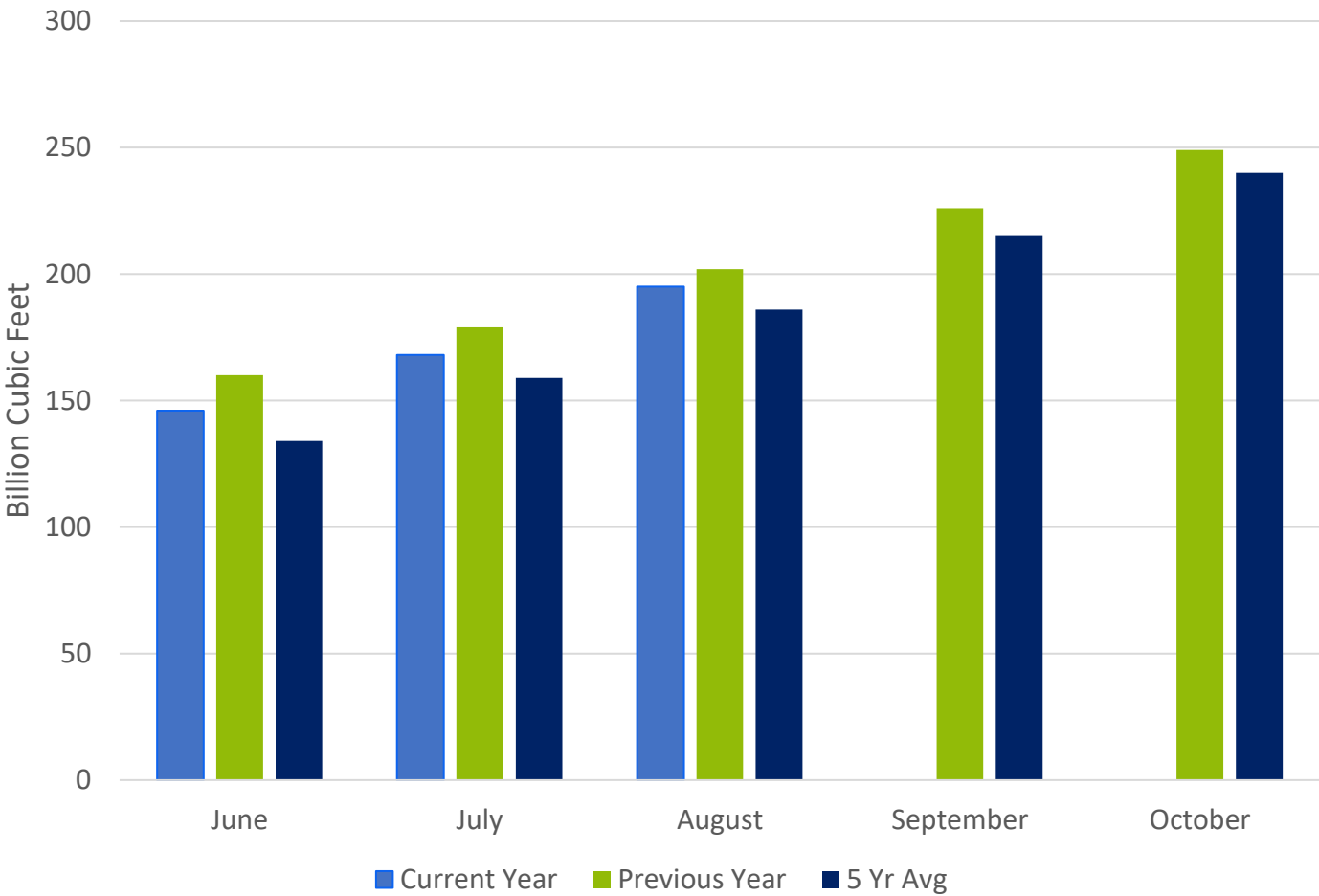


TCO Storage Update

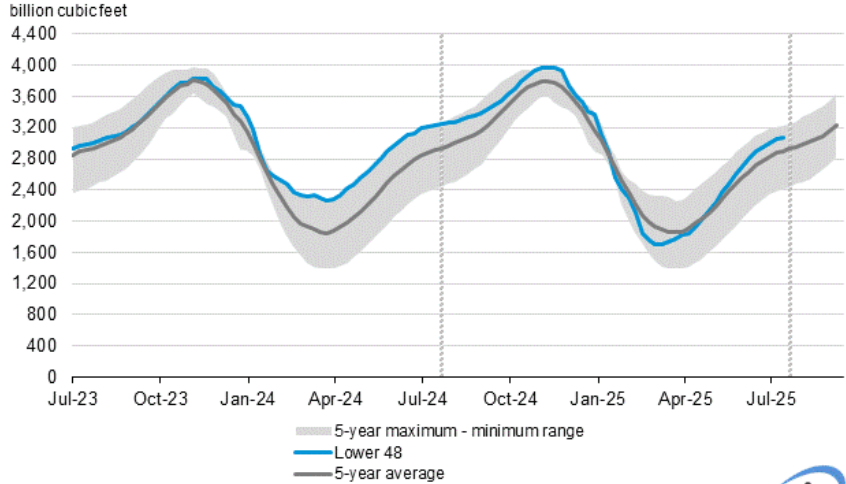
Shane Long – Operations Planning

TCO Storage Inventory & the EIA

Working Gas Levels as of August 15th, 2025



Working gas in underground storage compared with the 5-year maximum and minimum



Data source: U.S. Energy Information Administration
Note: The shaded area indicates the range between the historical minimum and maximum values for the weekly series from 2020 through 2024. The dashed vertical lines indicate current and year-ago weekly periods.



95 billion cubic feet less than previous year

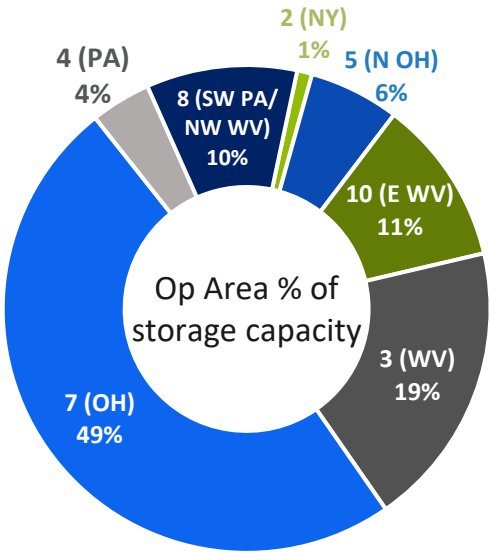
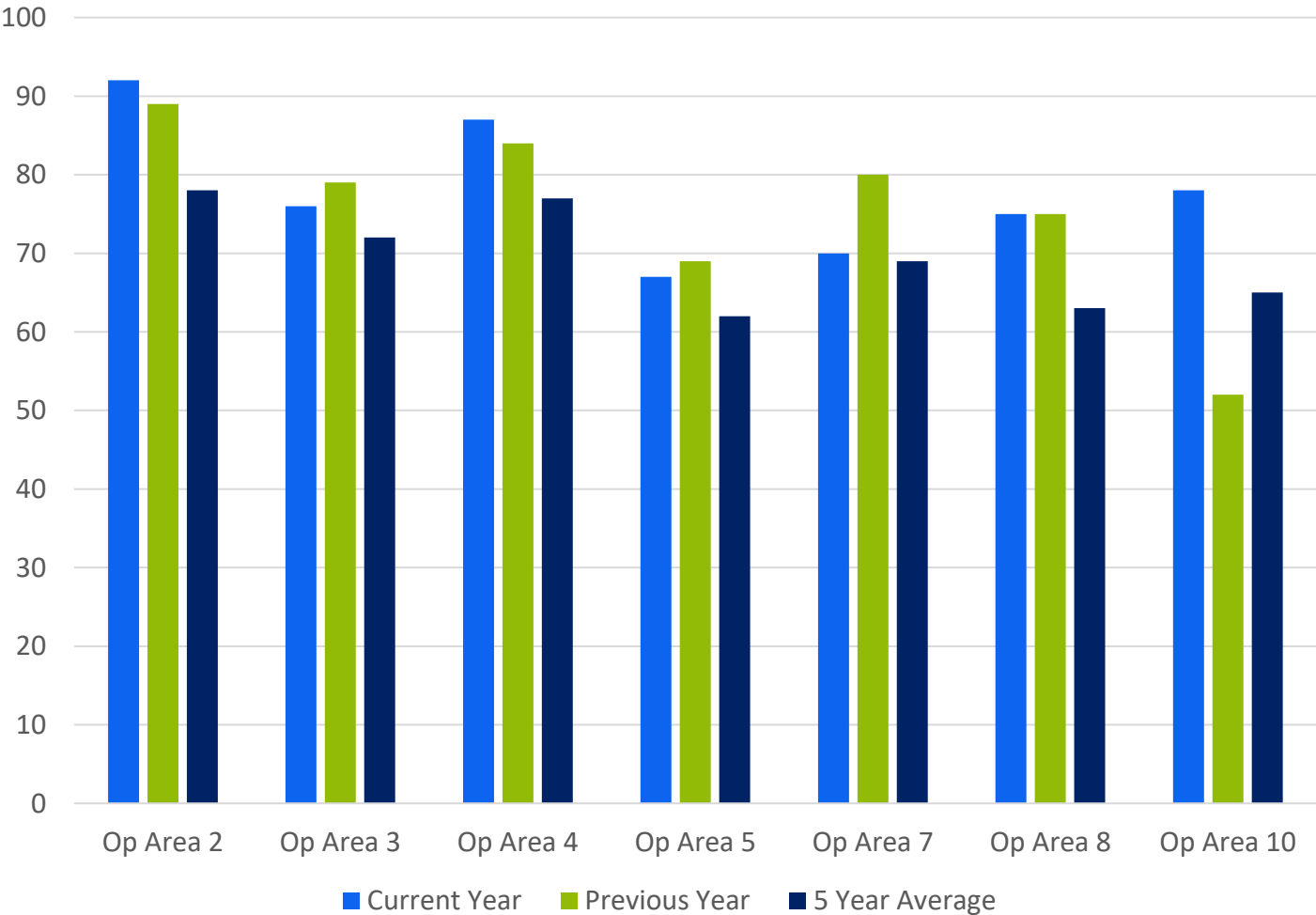


174 billion cubic feet above the five-year average



Storage Working Gas Inventory by Operating Area

Percent Working Gas Levels as of August 15th, 2025



Operating Area	Current % full	Difference from five-year avg.
2 (NY)	93%	14%
3 (WV)	76%	4%
4 (S Central PA)	88%	11%
5 (N OH)	68%	5%
7 (OH)	71%	2%
8 (SW PA/ NW WV)	75%	12%
10 (E WV)	78%	13%
TOTAL	73%	5%



All things FSS

- ❖ SCQ – Storage Contract Qty
- ❖ MDSQ – Maximum Daily Storage Qty
- ❖ MDIQ – Maximum Daily Injection Qty
- ❖ MMIQ – Maximum Monthly Injection Qty

Month	Max Monthly Inject Qty (percent of SCQ)
August	18%
September	13%
October	9%
November	5%

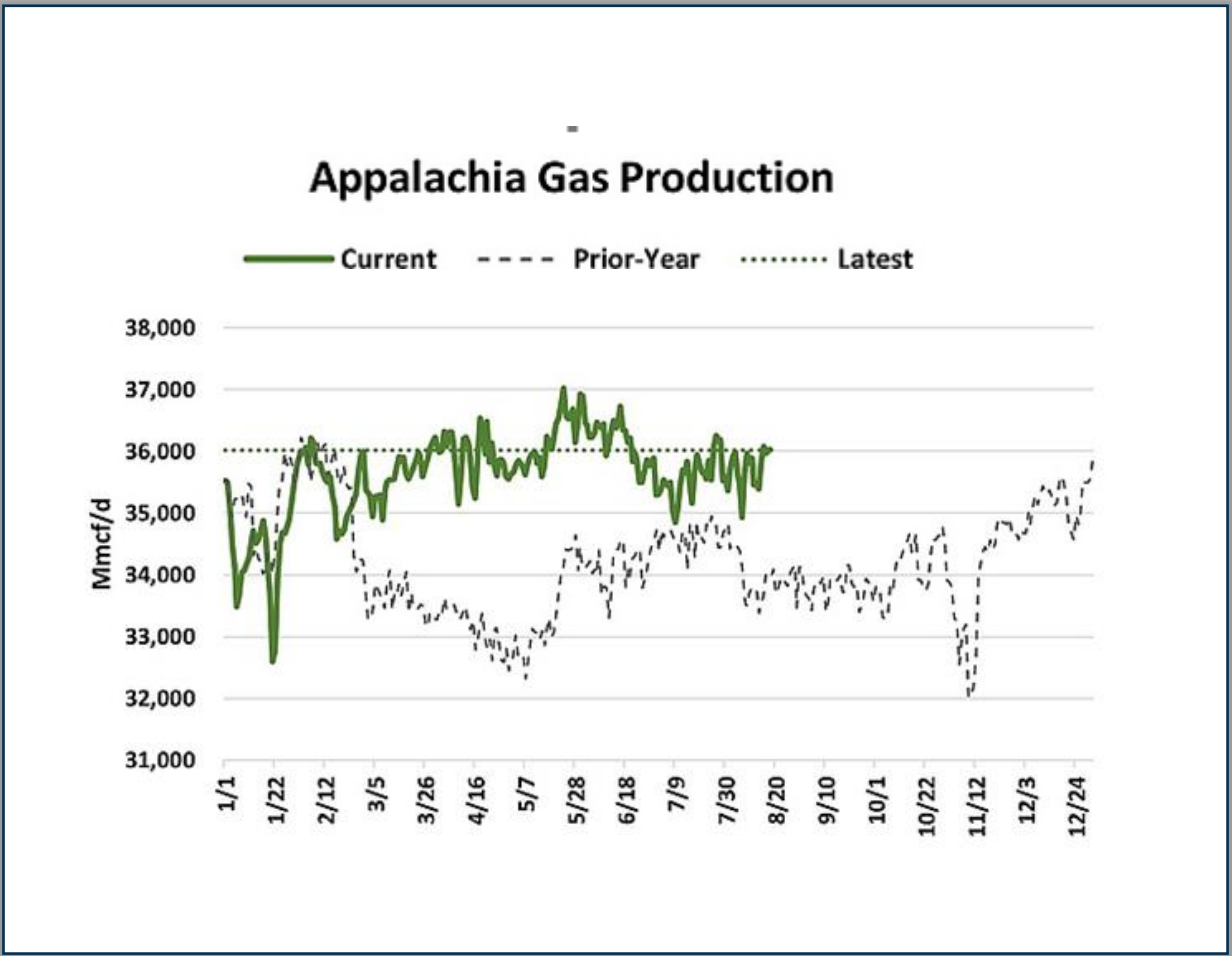
Month	Inventory (SCQ)
August 31	No more than 85%



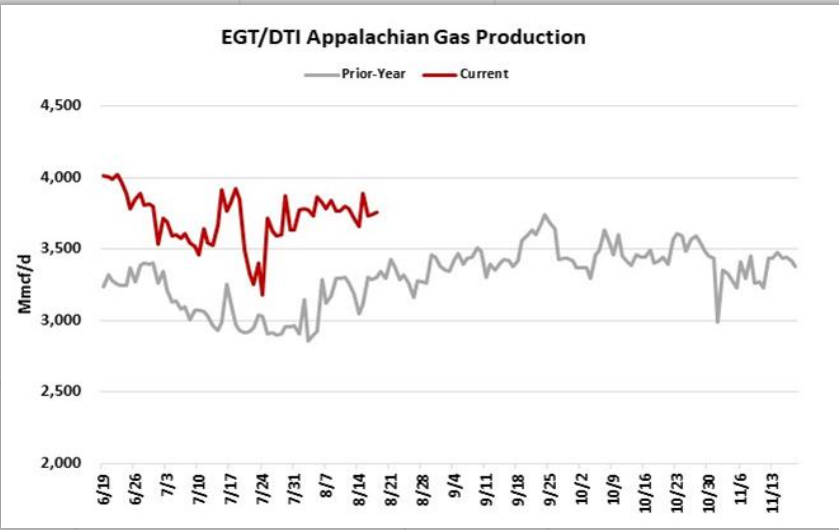
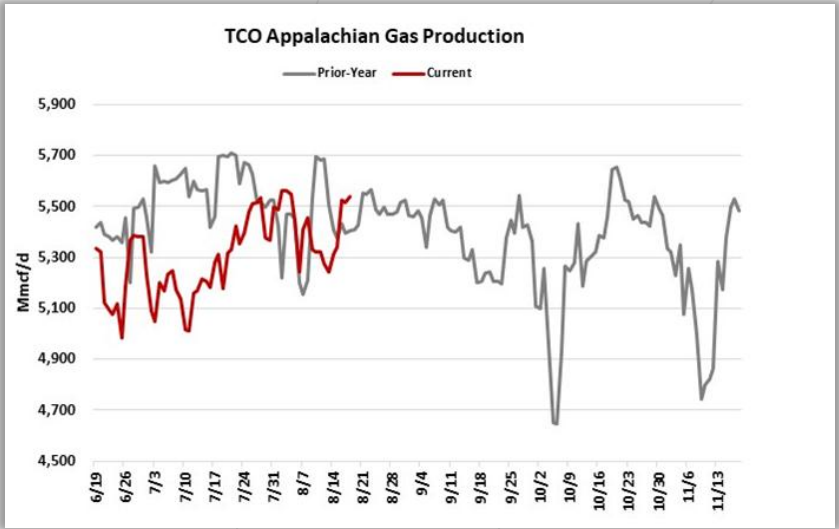
Market Outlook

Diana Roberts – Optimization, Storage, and Transportation

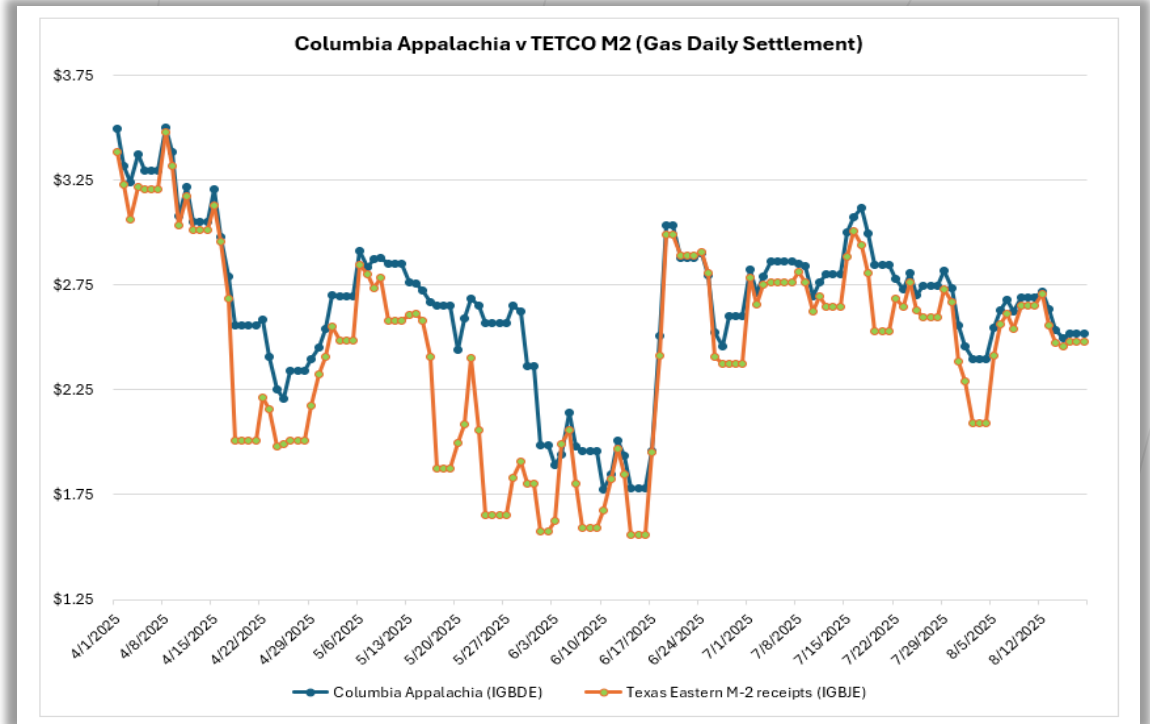
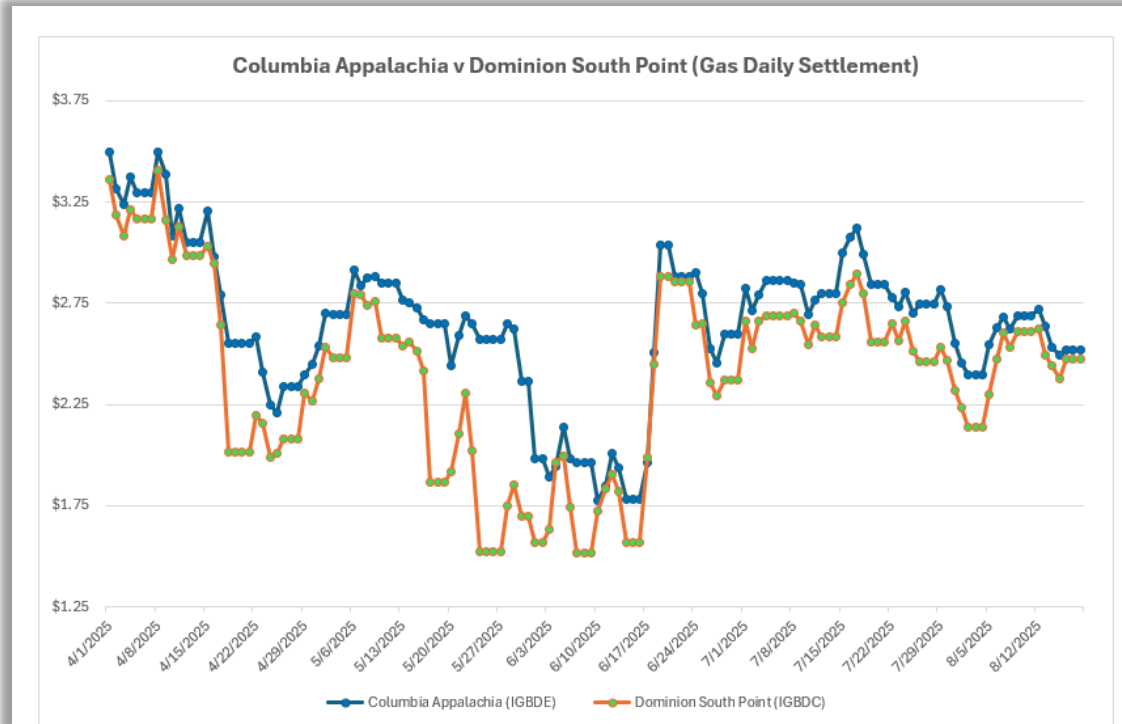
Summer 2025 NE Basin Production



DATA SOURCE FROM CRITERION RESEARCH AUGUST 2025



Summer 2025 NE Basin Pricing



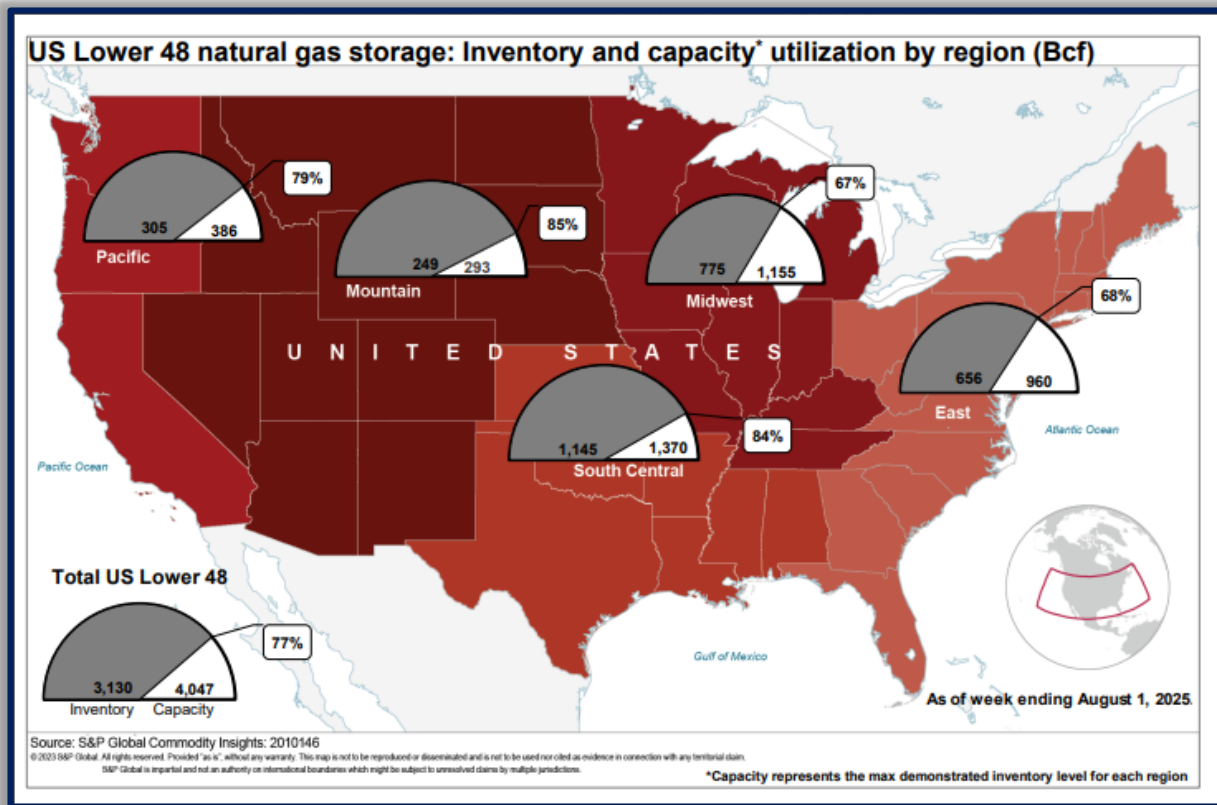
- Summer 2025 to date TCO v DOMSP spread average = \$0.25 TCO v TET2 spread average = \$0.20
- Widest spread during MVP maintenance events = \$0.95-\$1.045

DATA SOURCED FROM PLATTS 2025

AUGUST 21, 2025



Lower 48 Storage



- South Central - “Moderate” heat in the South Central, maintenance events and a shift in capacity holders has slowed meaningful storage cycling in the region.
- Northeast – A more impactful maintenance season this summer and pockets of record heat have kept regional storage nearly 7% below last years inventory levels.
- Midwest – Impact of early storage restrictions for Michcon (expected to last through October) call to question whether regional storage utilization will be able to catch up by the end of injection season.

Market Considerations

- Balance of August and September forecasts are now more than 60CDDs below the ten-year average.
- 2024 v 2025 storage deficit, which was +480 Bcf early in the injection season could shift to a storage surplus by mid-September, particularly if the Northeast and Midwest regions rush to cover their respective shortfalls this season before operational constraints further hinder storage injection capability.
- Peak hurricane season is still on the horizon, imbedded into an already bearish market - elevated South Central storage inventories may not offer the flex capacity needed to balance any LNG interruptions.



Construction and Maintenance

Dillon Schoolcraft – Customer Services

Upcoming TCO Maintenance

❖ Line H Pipe Replacement

- September 2 – October 10, 2025
- During this outage, a group of Production meters in the area will be shut in throughout the the outage.

❖ Cobb Compressor Station

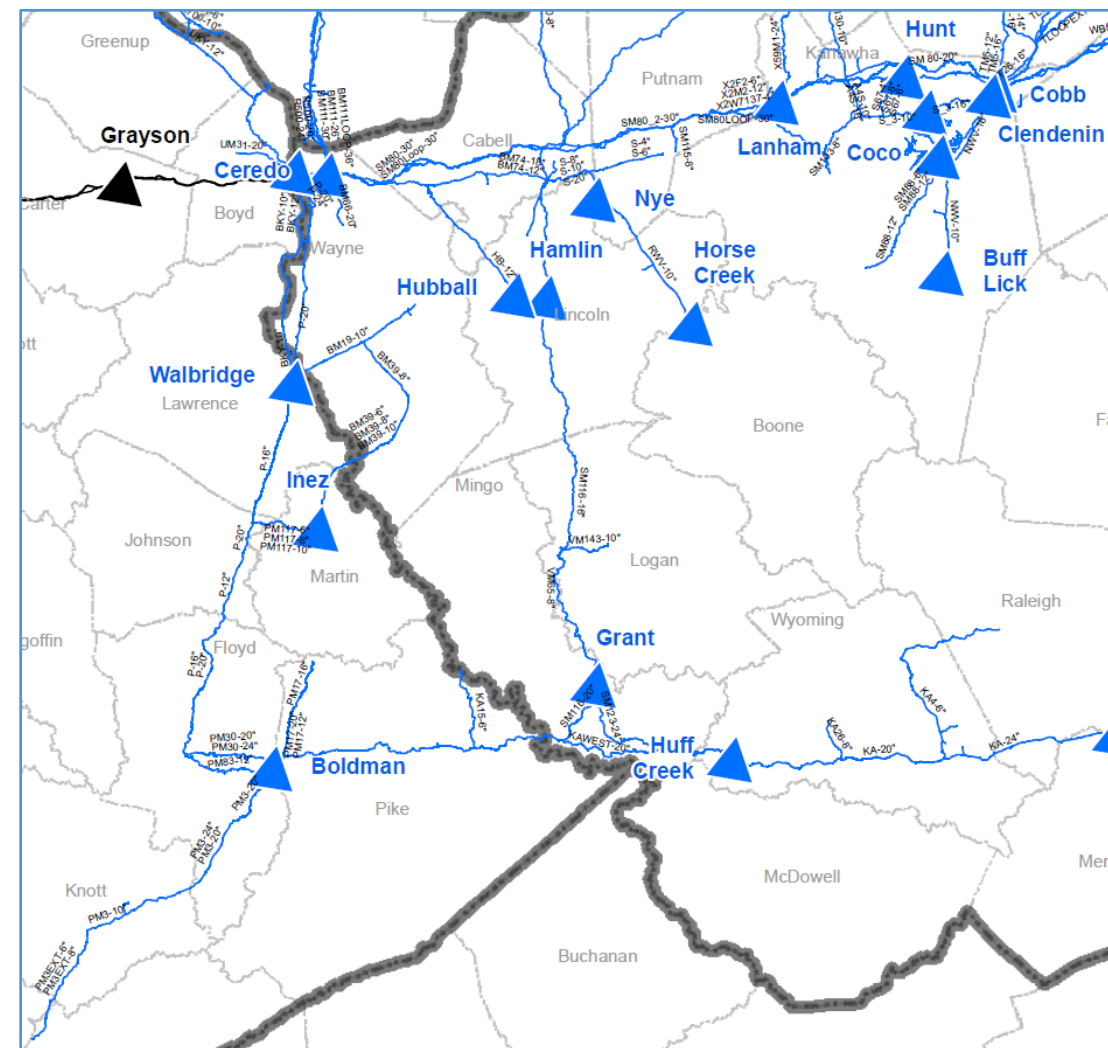
- September 8-21, 2025
- During this outage, A03NORTH, A03LOW, A03SOUTH, A03LINEH, & COBBA03 will be taken to zero total capacity.

❖ Line PM3 Pipeline Maintenance

- September 18-26, 2025
- During this outage, a group of meters in the southern part of the system will be impacted.

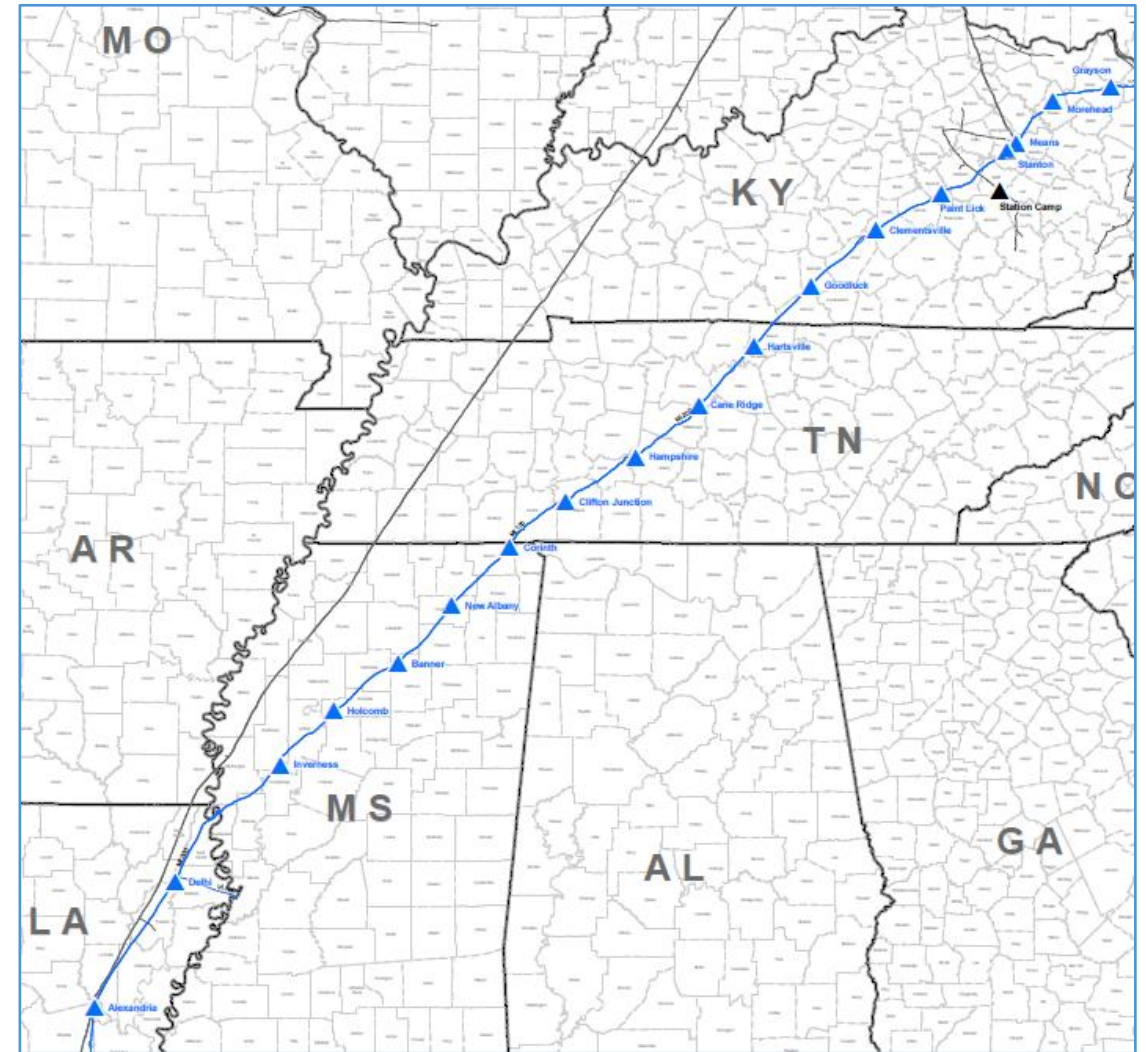
❖ Line 1983 Pigging

- September 22-26, 2025
- During this outage, the Smithfield-Mobley meter (642824) will be shut in through the week of pigging activities.



Upcoming CGT Maintenance

- ❖ **Mainline-200 between Stanton CS and Clementsville CS**
 - September 9-19, 2025
 - Backhaul through StanSEG will be reduced to a level between 1,800,000-2,375,000 Dth
- ❖ **Hartsville CS Full Station Outage**
 - September 9 – November 3, 2025
 - Backhaul capacity through HartSEG will be reduced to a level between 2,000,000 – 2,275,000 Dth
- ❖ **Alexandria Compressor Station VS Maintenance**
 - September 16-20, 2025
 - Backhaul capacity through AlexSEG will be reduced to a level between 2,450,000 – 2,550,000 Dth
- ❖ **Chicot Compressor Station Unit 3001 Maintenance**
 - September 17, 2025
 - Backhaul capacity through AlexSEG will be set at 2,450,000 Dth



News from Customer Services

Cindy Burnette – Manager, Customer Services

MEET OUR TEAM – Houston Customer Services



BILL HAMMERS

MANAGER, CUSTOMER SERVICES



JARRED ALLISON

CUSTOMER SERVICES ANALYST



LIBBY PERLITZ

CUSTOMER SERVICES ANALYST



MADHU SINGH

CUSTOMER SERVICES ANALYST



MARK BEGLEY

CUSTOMER SERVICES ANALYST



MICAH HARP

CUSTOMER SERVICES ANALYST



ULISES OSORIO

CUSTOMER SERVICES ANALYST



ZULEMA ELCHEHABI

CUSTOMER SERVICES ANALYST



MEET OUR TEAM – Charleston Customer Services



TYLER KING

MANAGER, CUSTOMER SERVICES



TOM KOONTZ

LEAD CUSTOMER SERVICES
ANALYST



JON YOUNG

LEAD CUSTOMER SERVICES
ANALYST



JOHN WHITED

CUSTOMER SERVICES ANALYST



DILLON SCHOOLCRAFT

CUSTOMER SERVICES ANALYST



ZACHERY HEAVER

CUSTOMER SERVICES ANALYST



JONAH SKILES

CUSTOMER SERVICES ANALYST



ANDY LEWIS

CUSTOMER SERVICES ANALYST





Q&A

If you have any questions, please utilize the Q&A feature on this Teams presentation, or direct questions to your Customer Services and/or Marketing Representative.



MARK YOUR CALENDAR FOR NEXT
MONTH'S CALL:

COLUMBIA PIPELINES MONTHLY
CUSTOMER UPDATE – THURSDAY,
SEPTEMBER 18th @ 2:30 ET/ 1:30 CT

ADDITIONAL QUESTIONS OR COMMENTS?
EMAIL: CINDY_BURNETTE@TCENERGY.COM

