THE RENEWABLES INFRASTRUCTURE GROUP

Interim results for six months to 30 June 2016

18 August 2016

www.TRIG-Ltd.com

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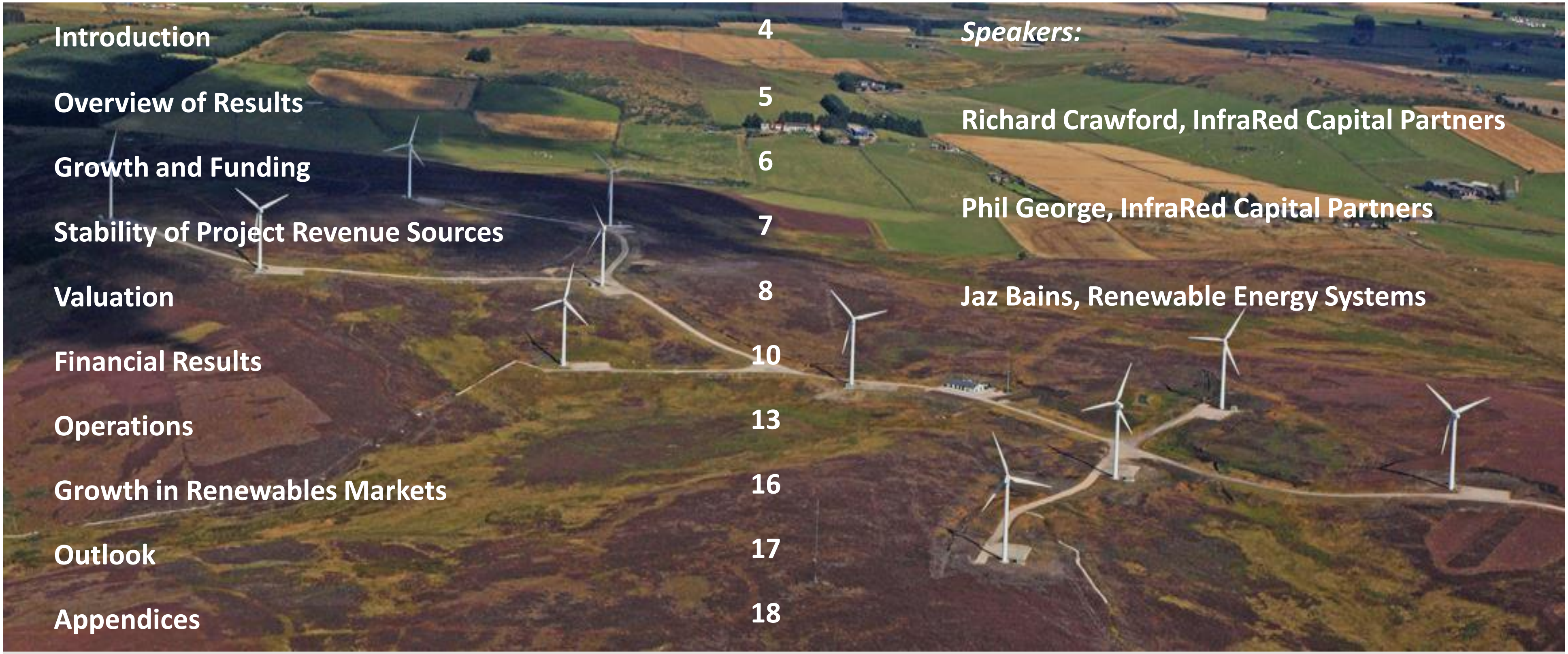
Speakers:

Richard Crawford, InfraRed Capital Partners

Phil George, InfraRed Capital Partners

Jaz Bains, Renewable Energy Systems



Meikle Carewe Wind Farm, one of TRIG's Scottish assets

INTRODUCTION TO TRIG

The leading London-listed renewables investment company[1]

About Us

- TRIG is invested in 51 operational onshore wind and solar projects in the UK, France and Ireland
- London-listed Guernsey investment company (IPO in 2013) with independent board of non-executive directors
- Advised by InfraRed Capital Partners as investment manager & Renewable Energy Systems as operations manager

Investor Returns[2]

- Dividend target of 6.25p per share, with upside from inflation
- c.6% annual cash yield
- Attractive long-term IRR outlook of 7% to 9%

Key Differentiators

- Substantial, diversified portfolio across technologies and geographies
- Low ongoing charges ratio (H1 2016: 1.15%)
- Distinct management combination with right of first offer from RES

1. The largest in its peer group by market capitalisation, portfolio value and net generating capacity.
2. These are not profit forecasts. The annual cash yield is based on target aggregate dividends for 2016 and share price of 107p as at 16 August 2016. There can be no assurance that targets referred to in this document will be met or that the Company will make any distributions or that investors will recover all or any of their investments. A more definitive resumption in growth in power prices will be an important factor in the performance f the renewables sector as a whole as well as in maintaining a dividend growing with inflation and a resilient net asset value over the years ahead.

Overview of Results

For the six months to 30 June 2016

Financial

NAV per share: 97.0p (Dec 2015: 99.0p), reflects dividends relating to 9 months[1]

Earnings per share: 2.6p (H1 2015: 3.2p), affected by lower power prices

Ongoing charges: 1.15% (H1 2015: 1.24%)

Funding: Revolving acquisition facility renewed and £30.3m equity raised

Market capitalisation: £745m at 30 June 2016

Operational

Portfolio increased to 680MW[2]: the largest diversified portfolio in the sector

Power generation: 738GWh (up 29% on H1 2015) 9% below expectations, predominantly due to British Isles weather

Two additional French solar investments with attractive pipeline of opportunities

Distributions

Dividends now quarterly

On track to achieve target dividend 6.25p per share for FY 2016

H1 2016 cash cover: 1.3x[3] on dividends of £20.1m paid in March

Total shareholder return: -0.3% in H1 2016 (annualised); FTSE 250: -5.4%[4]
+8.1% for 7 months (Jan-Jul 2016); FTSE 250: +0.8%[5]

1. Total dividends paid in H1 2016 relate to 9 months of operations, includes 3.11p for H2 2015 (paid in March 2016) and 1.5625p for Q1 2016 (paid in June 2016) reflecting the move from semi-annual to quarterly dividends
2. Excludes investment in Midi French solar project announced in July 2016
3. Calculated excluding additional quarterly dividend. Coverage is 1.1x without the benefit of scrip take up
4. Source: Thomson Reuters
5. Seven month TSR is also illustrated given the market volatility in June following the immediate aftermath of the EU Referendum vote.

Growth and Funding

Scale, diversification, strategic partnerships

Investments

January 2016: £44m in French solar portfolio (21MW)[1]

- Diversified across four French regions of Provence, Corsica, Guadeloupe and La Réunion
- Alongside Akuo, a major French renewables developer, who retains a 51% interest

July 2016: exchanged on Midi Solar (6MW) in Provence, France[2]

Equity Issuance

April 2016: Launch of second Share Issuance Programme (up to 300m shares over 12 months)

May 2016: £30.3m equity capital raised[3]

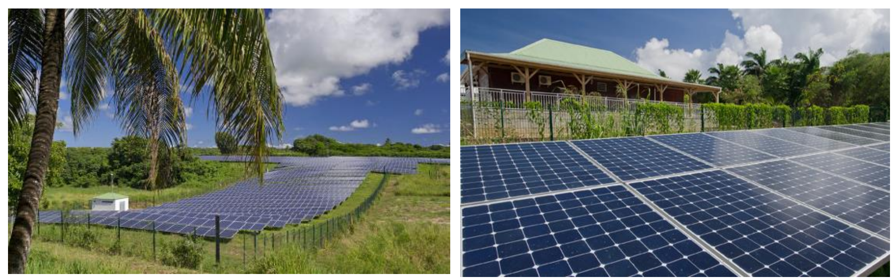
Revolving Acquisition Facility

April 2016: Renewed three year £150m facility

30 June 2016: £16m drawn

Evolution of TRIG's Portfolio

	Jun-2016	Dec-2015	IPO Jul-2013
Number of Projects	**51**	36	18
Net Capacity	**680MW**	658MW	276MW
Portfolio Value	**£760m**	£712m	£280m
Portfolio Gearing	**40%**	38%	49%
Wind/Solar Mix	**69%/31%**	73%/27%	90%/10%
Number of Vendors (cumulative)	**9**	7	2



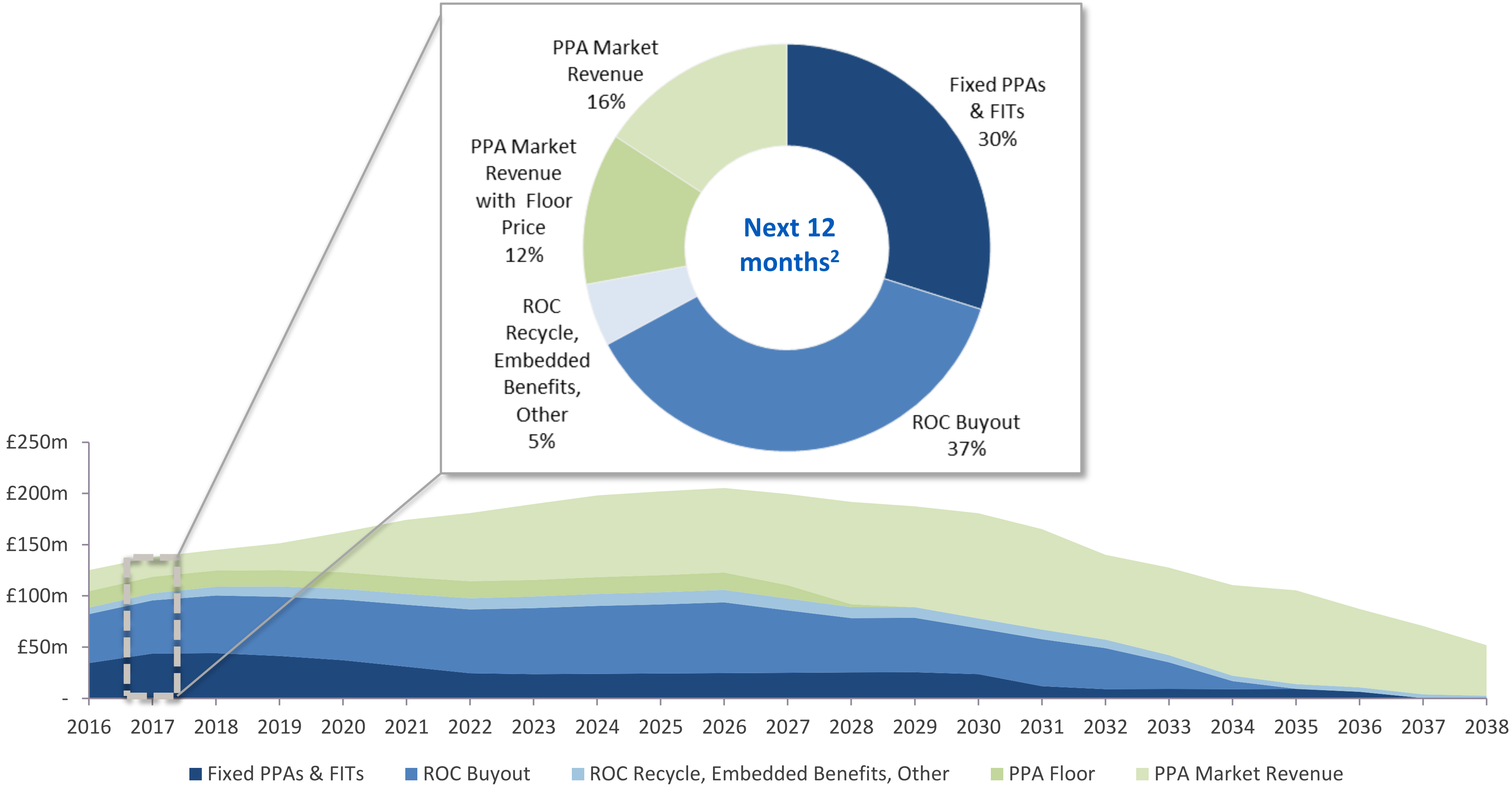
Two of the solar projects in the Akuo portfolio (TRIG invested in January 2016)

1. 49MW gross, 21MW net capacity
2. 12MW gross, 6MW net capacity
3. Before expenses

Stability of Project Revenue Sources

More than two-thirds of near-term revenues not linked to power prices

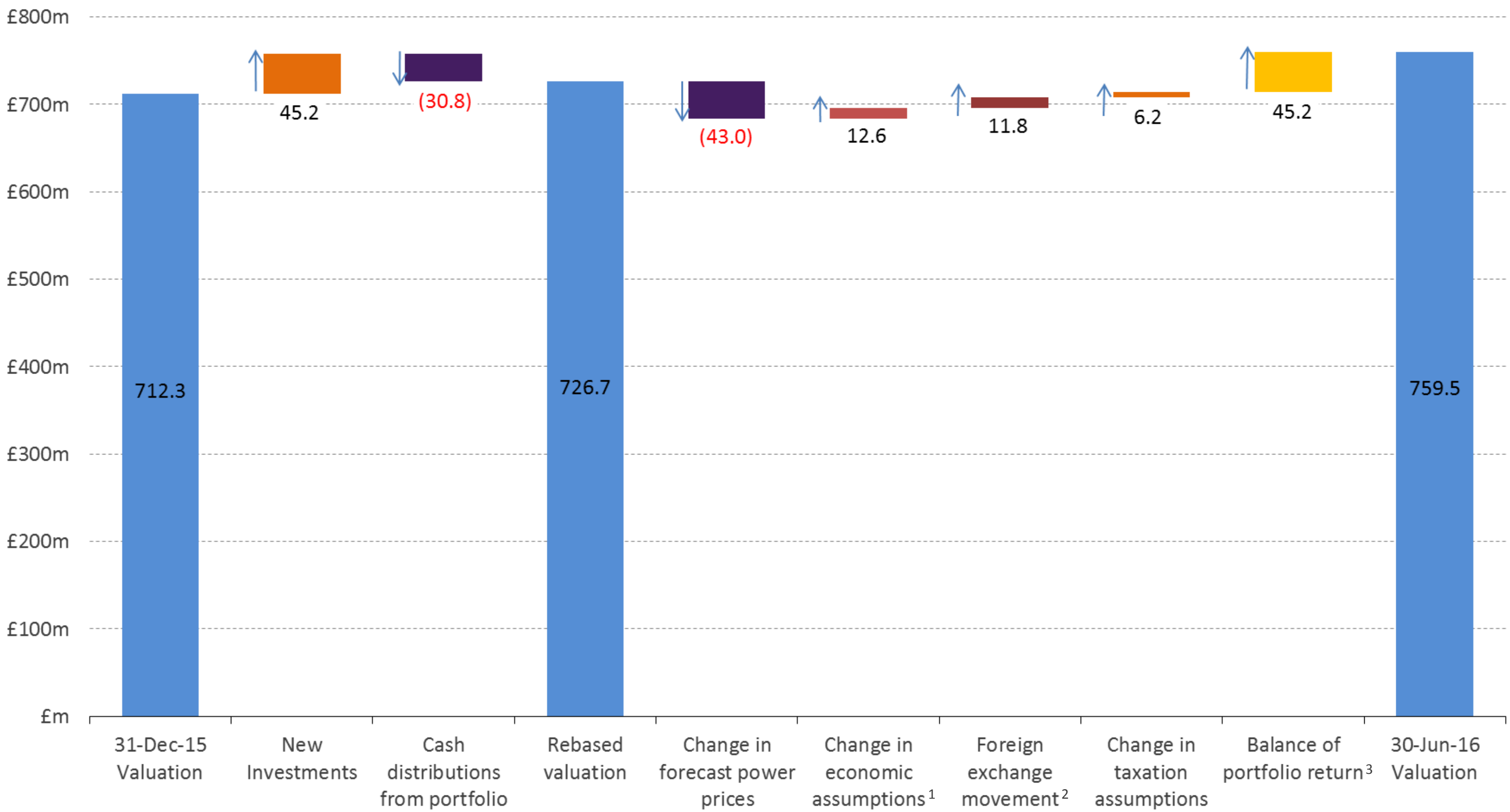
Project Revenue By Type[1]



1. Based on TRIG valuation model for all 51 projects following the Akuo French solar portfolio investment in January 2016
2. Project revenue expected for 12 months from 1 July 2016 to 30 June 2017

PORTFOLIO VALUATION BRIDGE – JUNE 2016

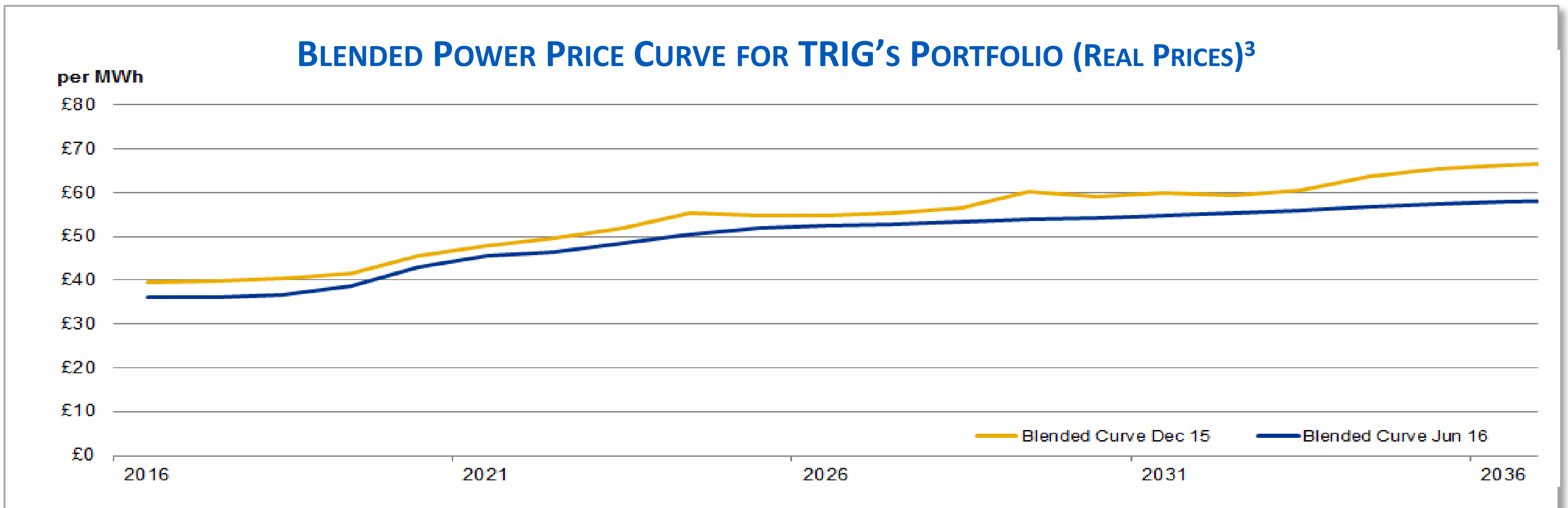
Movement of key elements in the Directors' valuation



1. Consists of changes in interest rates and discount rates
2. At the Company level there was a £6.1m loss on FX hedges. The net FX impact for the Company is hence a £5.7m gain for the period.
3. This refers to the balance of valuation movements and includes the unwinding of the discount rate. This represents a 6.2% increase in the rebased value.

VALUATION – KEY VARIABLES

		30 June 2016	31 December 2015
Discount Rate[1]	Weighted average	8.7%	9.0%
Power Prices[2]	Weighted by market	Based on third party forecasts	Based on third party forecasts
Inflation	UK France & Rep. of Ireland	2.75% 2.00%	2.75% 2.00%
Foreign Exchange	EUR / GBP	1.20	1.36



1. Discount rate reduction was taken in Q1
2. ¾ of power price reduction was in Q1
3. Prices assumed to be received by assets net of PPA discounts

Summary Income Statement

Reflects lower power prices partially offset by reduced discount rates and FX movements

			Six months to 30 June 2016 £m	Six months to 30 June 2015 £m
	Statutory Basis	Adjustments	Expanded Basis[1]	Expanded Basis
Total operating income	25.9	6.9	32.8	17.1
Acquisition costs	-	-	-	(0.5)
Net operating income	25.9	6.9	32.8	16.6
Fund expenses	(0.5)	(4.1)	(4.6)	(2.9)
Foreign exchange gains	(6.2)	0.1	(6.1)	2.9
Finance costs	-	(2.9)	(2.9)	(1.5)
Profit before tax	19.2	-	19.2	15.1
Earnings per share	2.6p		2.6p	3.2p
Ongoing Charges Percentage			1.15%	1.24%

1. The results shown above are on both the Expanded and Statutory IFRS bases. On the Expanded basis, The Renewables Infrastructure Group (UK) Limited ("TRIG UK"), which is the direct subsidiary of The Renewables Infrastructure Group Limited ("TRIG") and is the entity through which investments are purchased, is consolidated rather than accounted for at fair value. On the Statutory IFRS basis, TRIG UK is accounted for at fair value rather than being consolidated. Further explanation of the difference in the two accounting approaches is provided in the Analysis of Financial Results.

Summary Balance Sheet

NAV per share impacted by acceleration of dividend in H1

			30 June 2016 £m	31 December 2015 £m
	Statutory Basis	Adjustments	Expanded Basis	Expanded Basis
Portfolio value	743.0	16.5	759.5	712.3
Working capital	(4.5)	(1.2)	(5.7)	(0.9)
Debt	-	(15.9)	(15.9)	-
Cash	5.6	0.6	6.2	15.2
Net assets	744.1	-	744.1	726.6
NAV per share[1]	97.0p		97.0p	99.0p
Memo: Dividends per share paid in H1[2]		3.11p (H2 2015) 1.5625p (Q1 2016)	4.6725p	3.08p

1. 31 March 2016 NAV per share was 97.1p (as previously disclosed in the April 2016 Prospectus)
2. NAV per share on 30 June 2016 was after the payment of the dividend relating to 9 months of operations. Dividend was 3.11p for H2 2015 (paid in March) and 1.5625p for Q1 2016 (paid in June)

Summary Cash Flow

Resilient cash flows; lower dividend cover in current power price environment

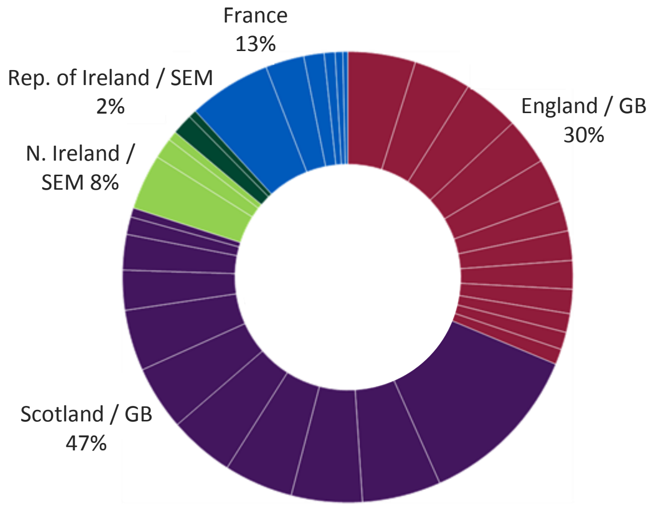
			Six months to 30 June 2016 £m	Six months to 30 June 2015 £m
	Statutory Basis	Adjustments	Expanded Basis	Expanded Basis
Cash received from investments	23.8	7.0	30.8	24.8
Operating and finance costs outflow	(0.7)	(4.1)	(4.8)	(3.8)
Net cash inflow before acquisitions and financing set up costs	23.1	2.9	26.0	21.0
Debt arrangement costs	-	(1.6)	(1.6)	(1.5)
Foreign exchange gains	(1.4)	0.1	(1.3)	1.5
Issue of share capital (net of costs)	30.3	(0.7)	29.6	108.0
Acquisition facility drawn	-	15.9	15.9	143.9
Purchase of new investments (including acquisition costs)	(29.3)	(16.3)	(45.6)	(254.7)
Distributions paid in March	(20.1)	-	(20.1)	(11.9)
Distributions paid in June	(11.9)	-	(11.9)	-
Cash movement in period	(9.3)	0.3	(9.0)	6.3
Opening cash balance	14.9	0.3	15.2	12.9
Net cash at end of period	5.6	0.6	6.2	19.2
Cash dividend cover			1.3x[1]	1.8x[2]

1. Cash coverage calculated as £30.8m cash from investments in H1 less costs of £4.8m divided by the cash dividend paid in March (£20.1m). Cash from investments is after project level debt repayments of £14m and benefits from c.£7m of extraction of surplus working capital balances at the project company level. Two dividends were paid during H1 2016, for H2 2015 paid in March and for Q1 2016 paid in June, so dividends paid in H1 relate to nine months of operations. Dividend coverage includes the March dividend only so as to compare 6 months of cash flows with 6 months of dividends.
2. H1 2015 cover benefitted in particular from more favourable weather conditions and higher power prices than H1 2016.

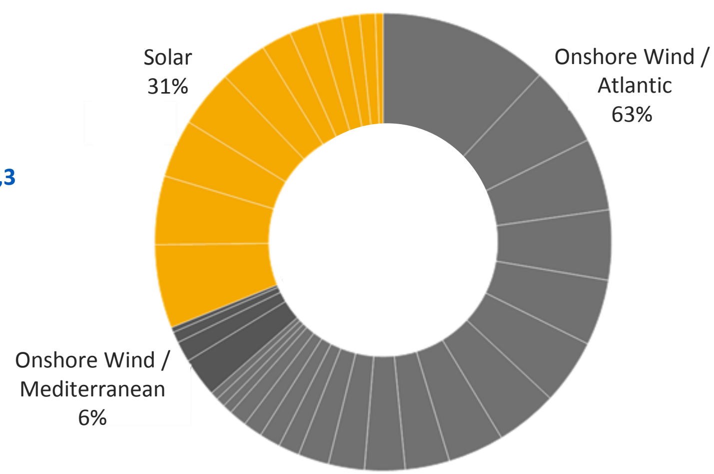
DIVERSIFICATION – TECHNOLOGY / LOCATION

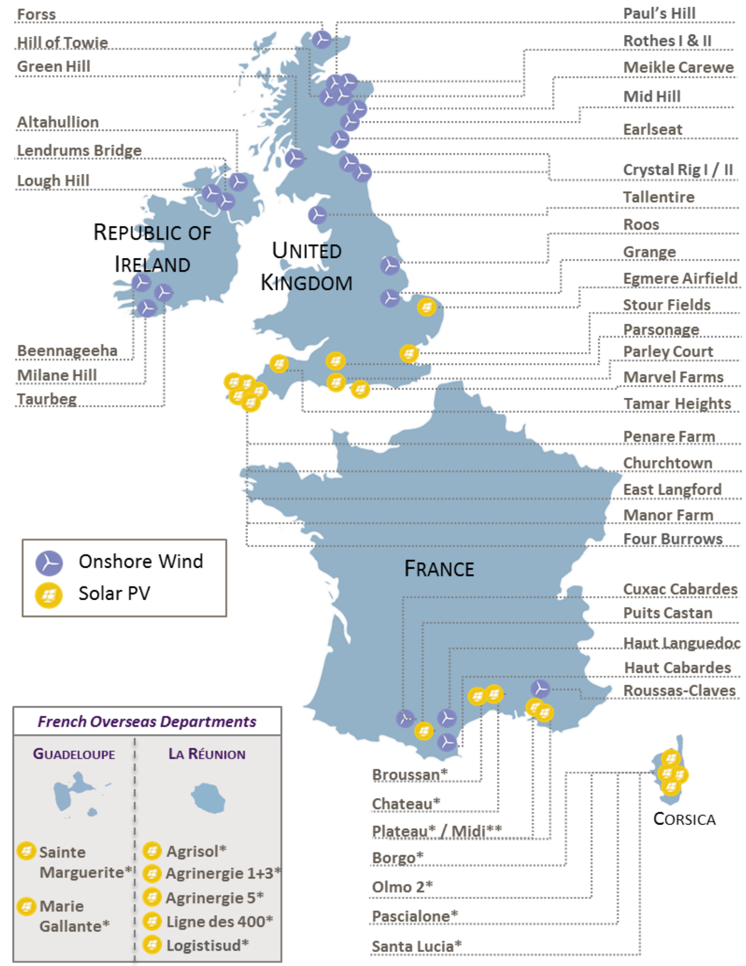
June 2016: 680 MW net capacity / 51 projects

BY JURISDICTION/ POWER MARKET[1]



BY TECHNOLOGY/ WEATHER SYSTEM[2,3]





*Additions to the TRIG portfolio since 1 January 2016

**Acquisition announced since 1 July 2016

1. Northern Ireland and the Republic of Ireland form a Single Electricity Market, distinct from that operating in Great Britain.
2. Segmentation by estimated portfolio value as at 30 June 2016.
3. Dominant winds in the British Isles are from the south-west and are generally driven by the passages of Atlantic cyclones across the country. Dominant winds in Southern France are associated with gap flows which are formed when north or north-west air flow (associated with cyclogenesis over the Gulf of Genoa) accelerates in topographically confined channels.

OPERATIONAL PERFORMANCE (1)

Challenging weather conditions in H1 – mitigated by diversification

OVERALL PRODUCTION / WEATHER

H1 aggregate portfolio generation was 738 GWh[1]

- Up 29% on H1 2015 with increase in portfolio scale
- 9% below P50 budget for portfolio
- Largest contributory factor was unfavourable weather in the British Isles

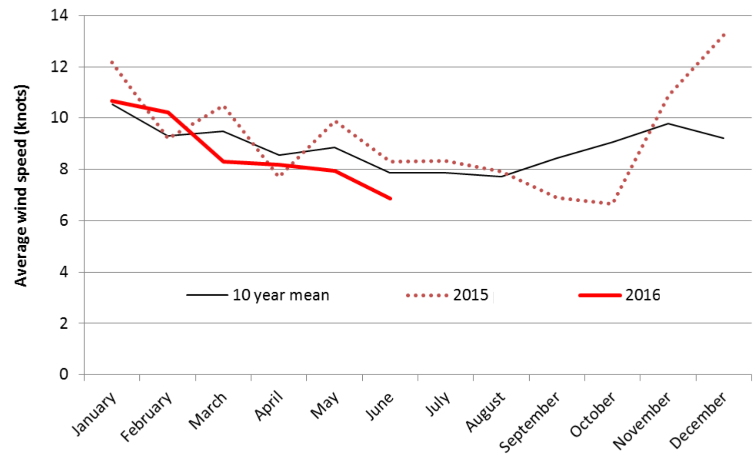
Wind performance

- British Isles wind speeds: 5% below long-term average[2]
- Mitigated by French wind speeds: 5% above long-term average[2]
- Overall **-7% wind speed impact on generation** (vs P50)

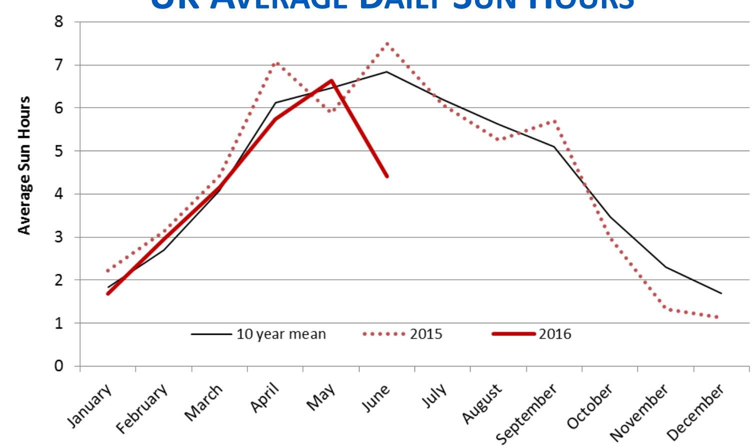
Solar performance

- Poor irradiation in Southern England in June
- English solar generation below budget, French solar on target
- Overall **-5% irradiation impact on generation** (vs P50)

UK AVERAGE WIND SPEED[4]



UK AVERAGE DAILY SUN HOURS[4]



1. Includes compensated lost production
2. Source: RES analysis / NASA-MERRA on TRIG sites
3. Source: RES analysis / HelioClim on TRIG sites
4. Source: Energy Trends and Prices statistical release 28 July 2016, Department of Business, Energy & Industrial Strategy / Met Office

Operational Performance (2)

Active management to maximise operational performance

Specific Factors (H1 2016)

Unusual levels of grid outages:
due to new (mainly solar) plant connections

Equipment related downtime:
following "end of warranty" inspections

Enhancement Initiatives

Comprehensive portfolio monitoring: enabling multi-site initiatives and interventions

Yield performance improvements: applying innovative turbine control software e.g. greater blade positioning precision, icing response

Grid curtailment management: dialogue with grid operators, rescheduling planned maintenance activities

Statutory turbine inspections: performed by qualified RES personnel, reducing downtime and enabling accelerated remediation

Active warranty management: tailored end of warranty assessment regime to maximise asset quality

Growth in Renewables Market

Further portfolio opportunities

- UK pipeline remains strong, driven by historic build activity in onshore wind and solar PV
- UK new development emphasis shifting to offshore wind under CfD auctions
- French renewables seeing continued impetus from government policy to replace nuclear generation
- Market interest in battery storage – but costs need to come down for material investment opportunity
- Investment policy now permits allocation of up to 20% in technologies beyond onshore wind and solar

UK Renewables: Capacity Outlook

	March 2015 Capacity[1]	March 2016 Capacity[2]	**Estimate 2020 Capacity[3]**	**Estimate 2020 EV[3]**	Generation 2015 TWh[4]
Solar PV	7.9GW	9.6GW	**12GW**	**£15bn**	8.0
Onshore Wind	8.7GW	9.4GW	**12GW**	**£25bn**	22.1
Offshore Wind	4.7GW	5.1GW	**10GW**	**£30bn**	17.9
Total	21.3GW	24.1GW	**34GW**	**£70bn**	48.0

1,2. Source: Energy Trends and Prices statistical release July 2016, Department of Business, Energy & Industrial Strategy
3. 2020 capacity and enterprise value estimated by InfraRed Capital Partners
4. Generation is calculated as the sum of quarterly data from Q1 2015-Q1 2016, the latest government data

OUTLOOK

Distinct management combination	▲ InfraRed and RES: active management of portfolio
Substantial portfolio	▲ Diversified ▲ Low ongoing charges ratio
Power price forward market improving	▲ Impetus from currency movement post Brexit ▲ Long term supply / demand dynamics
Generating attractive income	▲ Cash-covered dividends, on track to achieve 6.25p/share for 2016 ▲ £100m of dividends declared since IPO
Well-positioned for growth opportunities	▲ Broad pipeline ▲ Refreshed acquisition facility and share issuance programme

APPENDICES

TRIG – Experienced Management

Independent Board

- **Helen Mahy CBE** (Chair)
- **Jonathan Bridel**
- **Klaus Hammer**
- **Shelagh Mason**

Investment Manager

InfraRed Capital Partners

- 20 years of experience in infrastructure and real estate funds
- Over US$9 billion of equity under management
- Managing renewables since 2006
- Also adviser to HICL, the first London-listed infrastructure investment company
- London-based, with 5 other offices and >120 staff

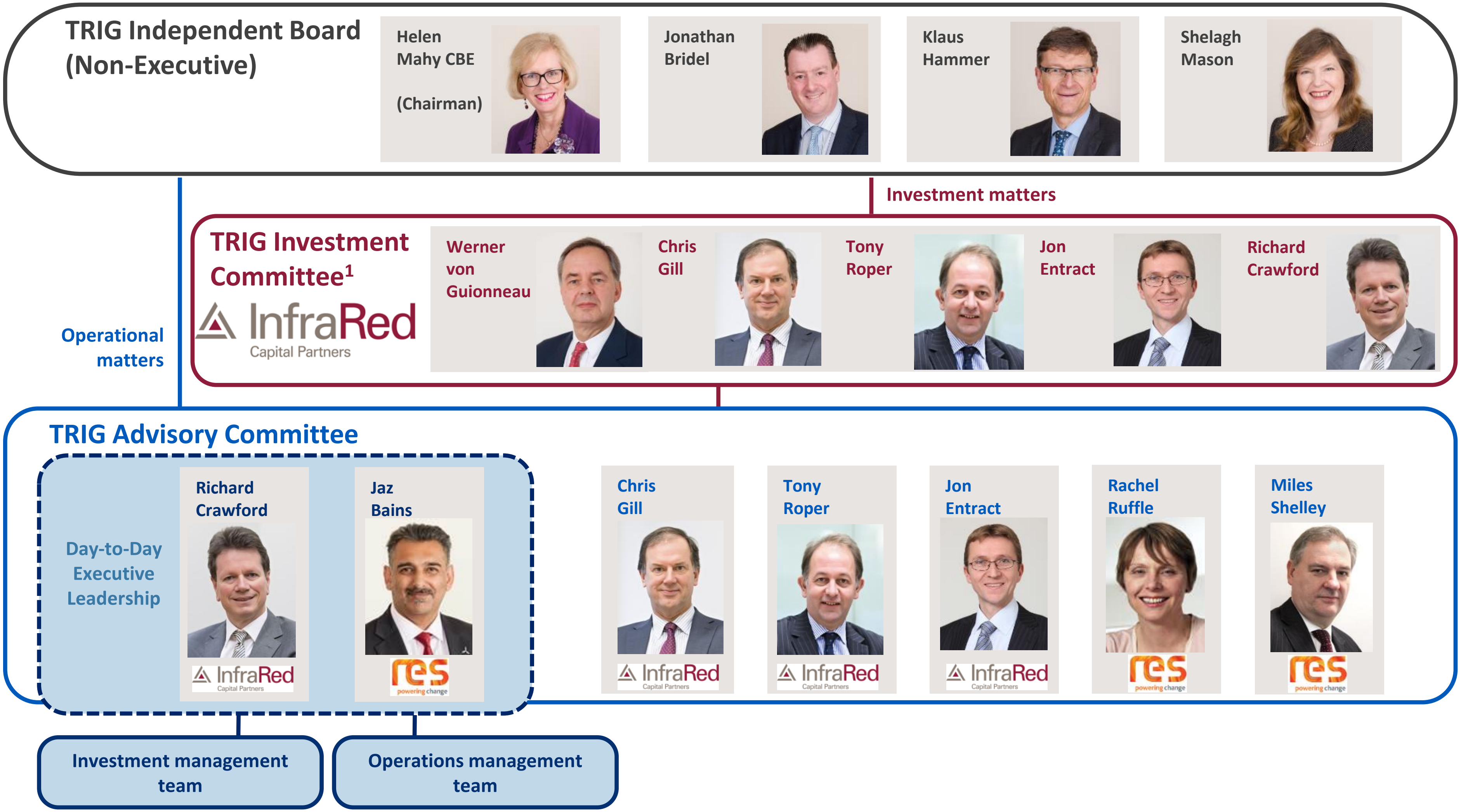
Operations Manager

res powering change

- One of the world's leading renewable energy developers and operators
- Privately-owned member of the 145-year old McAlpine group of companies
- Extensive, 30+ year experience in renewables
- >200 wind, solar and energy storage projects totalling >10 GW
- UK head office; >1,500 staff engaged in renewables in 14 countries

Senior Management Team

Over 100 years of relevant experience on the TRIG Advisory Committee



Operations Management

Breadth and depth of capability provided by RES

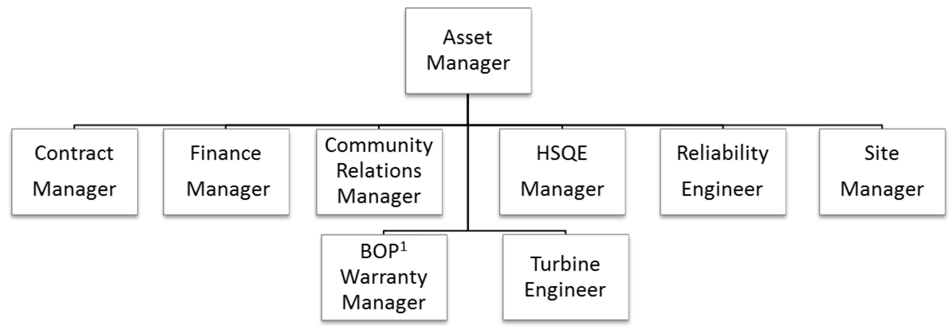
Managing performance

- **Availability** – minimising lost production, fault rectification
- **Generation** – maximising output, maintenance planning, turbine & grid settings
- **Financial** – budget control, minimising costs, distributions
- **Contracts** – tendering, contracting & performance monitoring of turbine, civil & electrical O&M contracts

Managing compliance

- **Statutory** – health & safety, UK GAAP, legal
- **Regulatory** – planning conditions, grid code, subsidies
- **Contractual** – land, PPA, project financing
- **Reporting** – provision of SPV directors, oversight of financials, tax & insurance reporting

RES: Resourcing Structure



Routine Project Support

SCADA[2] Engineer	Civil Engineer	Grid Engineer	Lifting AP[3]	Electrical Engineer

Routine Financial Support

VAT	Corporate Tax	Financial Analyst	Central Accounts	Compliance

Project Support on Request

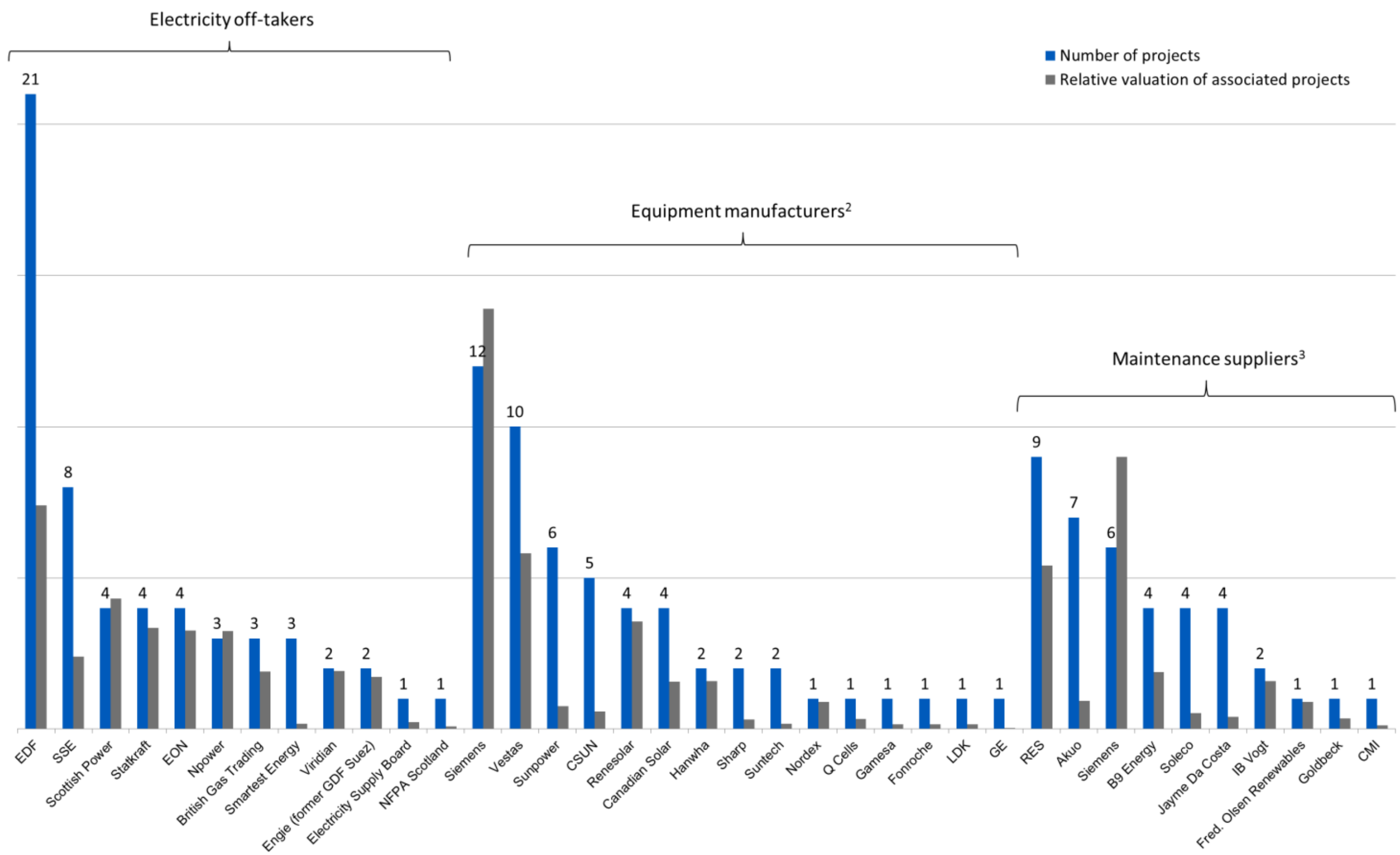
Turbine team	Civil / Electrical Design Team	Wind / yield Specialists	Property/ Land Teams	Development/ Environment	Finance / Legal Teams

1. **BOP** = Balance of Plant;
2. **SCADA** = Supervisory Control and Data Acquisition
3. **AP** = Authorised Person

COUNTERPARTIES

Broad spread of high quality equipment, maintenance and off-take counterparties

COUNTERPARTIES BY RELATIVE VALUE OF ASSOCIATED PROJECTS AND NUMBER OF PROJECTS[1]

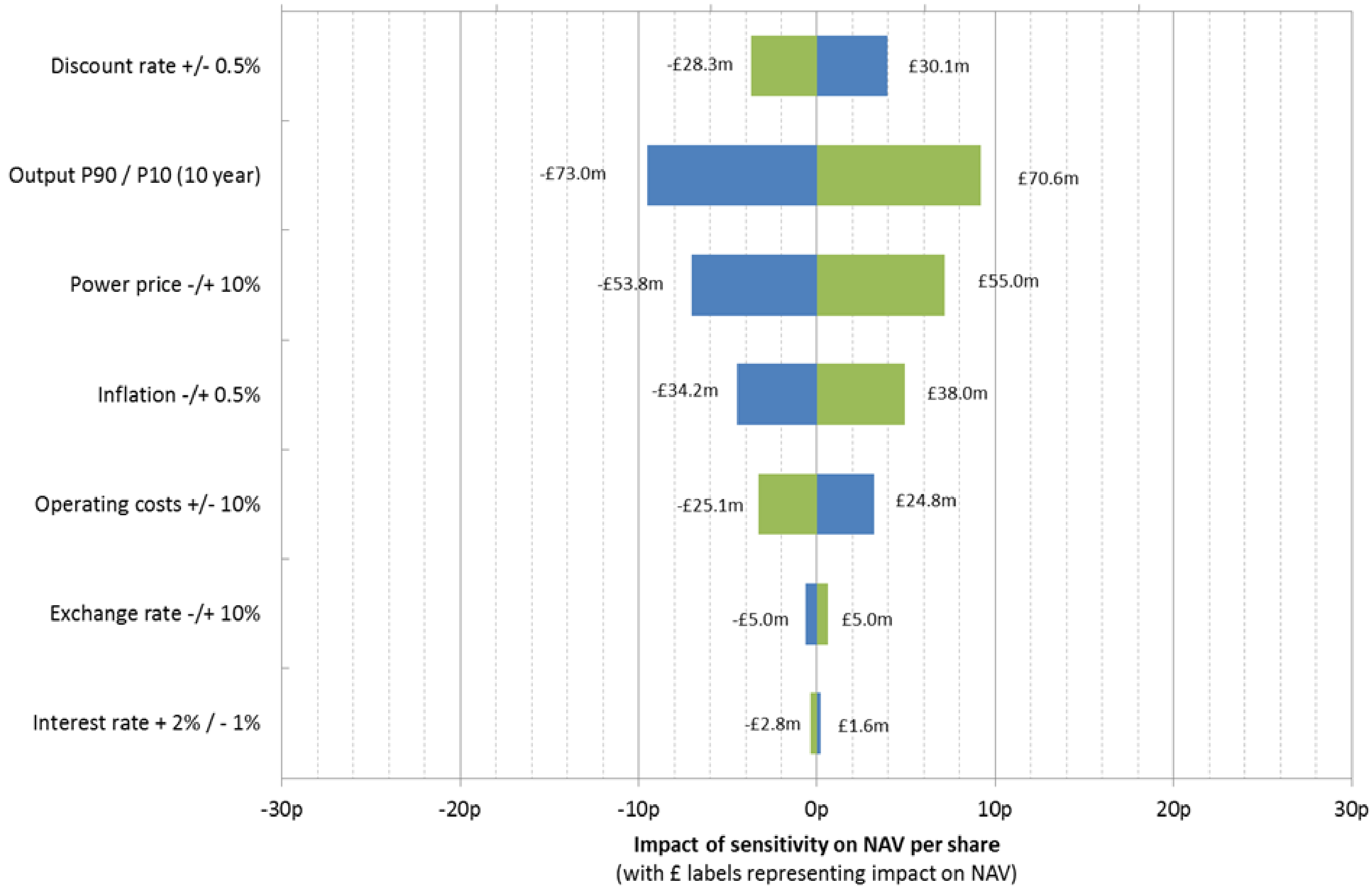


The supplier that TRIG has the largest exposure to is Siemens who provide turbine maintenance services to 46% of the TRIG projects by valuation (12 wind farms). Siemens has a credit rating of A+/Stable.

1. By value, as at 30 June 2016 using Directors' valuation. Some projects have more than one contractor, in which cases the valuation of the associated project is apportioned.
2. Equipment manufacturers generally also supply maintenance services
3. Where separate from equipment manufacturers

NAV SENSITIVITIES

Based on portfolio as at 30 June 2016



DIVIDEND SCHEDULE

Dividend target of 6.25p per share, with upside from inflation

Period	Aggregate annual dividend per share	Interim dividends per share	Payment timing
Q4 2016	6.25p	1.5625p	Target 3/2017
Q3 2016		1.5625p	Target 12/2016
Q2 2016		1.5625p	Due 9/2016
Q1 2016		1.5625p	Paid 6/2016
H2 2015	6.19p	3.11p	Paid 3/2016
H1 2015		3.08p	Paid 9/2015
H2 2014	6.08p	3.08p	Paid 3/2015
H1 2014		3.00p	Paid 9/2014
H2 2013	6.00p[1]	2.50p	Paid 3/2014

1. 2.50p per share was paid relating to the first five months of operations following IPO and represents 6p on an annualized basis

Enhancing Diversification – Akuo Portfolio

Investment in January 2016

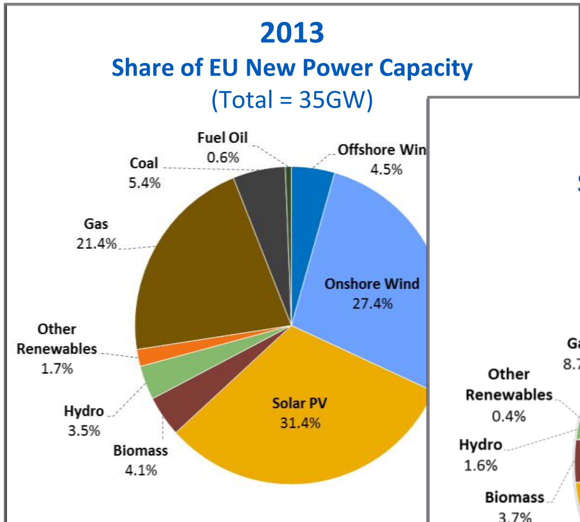
- 15 operational French solar PV projects
  - Gross generating capacity of 49MW
- Euro €57m (£44m) investment[1]
  - 49% of holding company equity + 100% of a mezzanine loan
- Partnering with Akuo Energy - a major renewables developer in France and internationally
  - Akuo retaining 51% of equity in holding company
  - Underlying projects in 5 "régions" of France
    - Languedoc-Roussillon + Provence (Southern France)
    - Corsica (Mediterranean)
    - Guadeloupe (Caribbean)
    - La Réunion (Indian Ocean)
  - Projects commissioned between 2010 and 2012
  - RES represents TRIG on holding company board
- Pre-existing project financing
  - Currently 65% of enterprise value, amortising
  - Reflecting fixed feed-in tariffs / PPAs with EDF

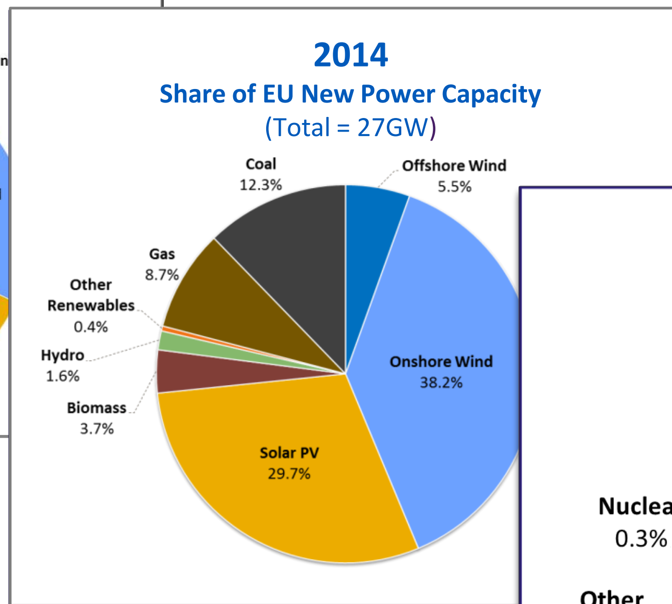
Photos: Akuo Energy

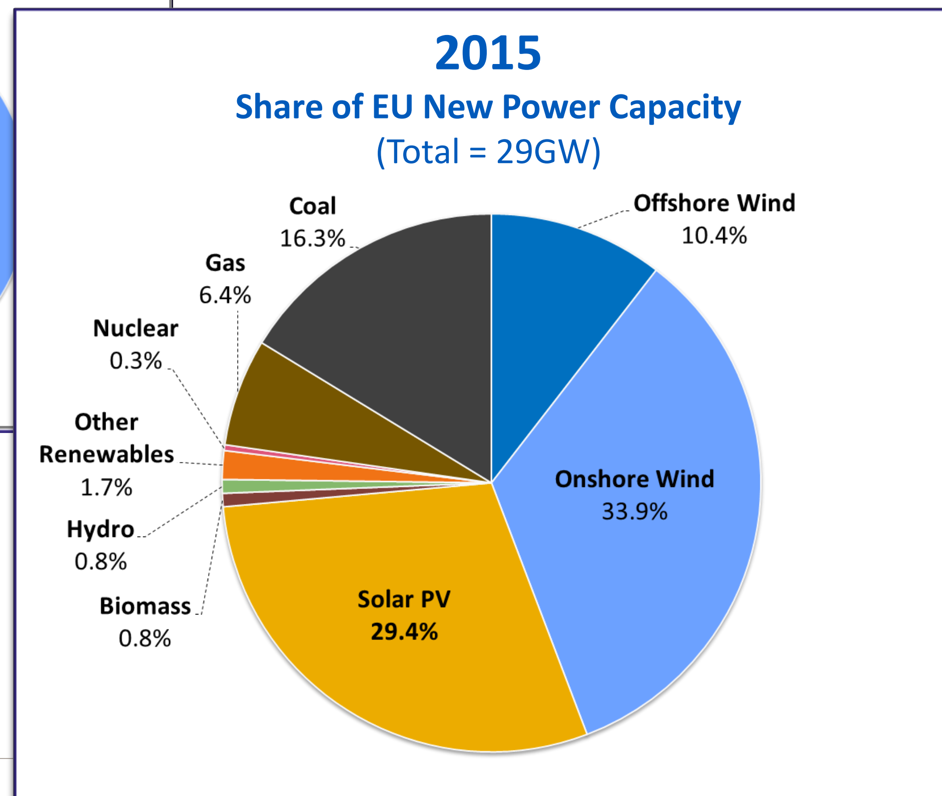
1. Closed on 28 January 2016. €/£ exchange rate at completion was 1.31.

Outlook: EU Power Capacity Installations

Wind + Solar PV: dominating European new power capacity



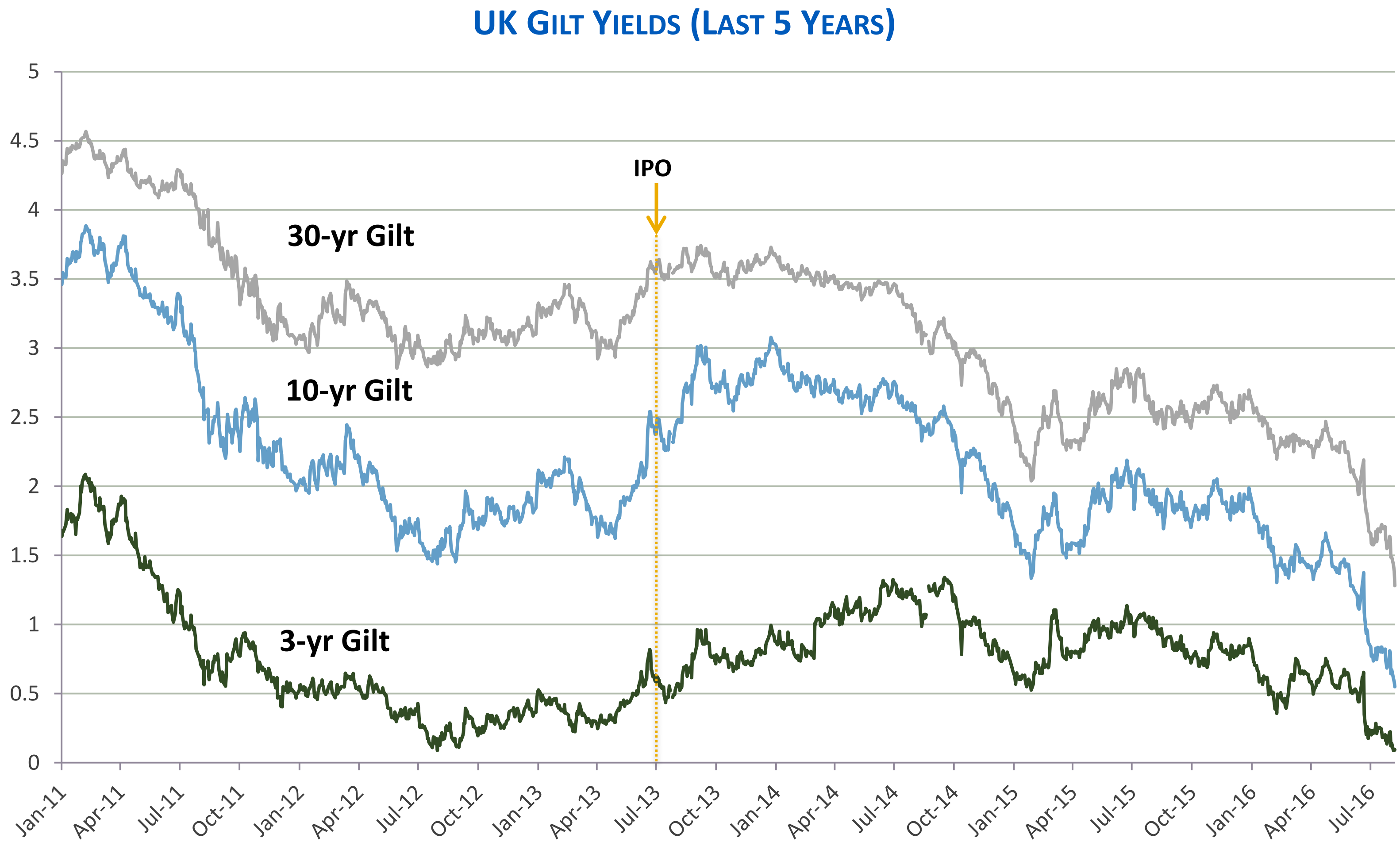




Source: Data from EWEA Annual Statistics (Copyright Wind Europe)

UK Government Benchmark Yields

Low rate environment makes yielding assets attractive



Source: InfraRed, Thomson Reuters

TRIG: Key Facts

Fund Structure	▲ Guernsey-domiciled closed-end investment company
Issue / Listing	▲ Premium listing of ordinary shares on the Main Market of the London Stock Exchange (with stock ticker code TRIG) ▲ FTSE-250 listed ▲ Launched in July 2013
Return Targets[1]	▲ Quarterly dividends with a target aggregate dividend of 6.25p per share for the year to 31 December 2016 ▲ Long term IRR target in the region of 7.0% to 9.0% p.a. net of fees (assuming an issue price of 100p per New Ordinary Share under the Share Issuance Programme)[3]
Governance / Management	▲ Fully-independent board of 4 directors ▲ Investment Manager (IM): InfraRed Capital Partners Limited (authorised and regulated by the Financial Conduct Authority) ▲ Operations Manager (OM): Renewable Energy Systems Ltd ▲ Management fees: cash fee of 0.8% p.a. of Adjusted Portfolio Value[2], plus 0.2% p.a. in shares on up to £1 billion of Adjusted Portfolio Value; fees split 65:35 between IM and OM ▲ No performance or acquisition fees ▲ Procedures to manage any conflicts that may arise on acquisition of assets from funds managed by InfraRed

Performance	▲ Quarterly dividend of 1.5625p ▲ Maintained annual dividend yield of c.6.0% ▲ 2015 Total Shareholder Return of 8.1% (versus 0.81% for the FTSE 250) - Source: Thomson Reuters, FTSE Index Series ▲ 30 June 2016 NAV per share of 97.0p Market Capitalisation of approximately £745m (30 June 2015)
Key Elements of Investment Policy / Limits	▲ Geographic focus on UK, Ireland, France, plus selectively other Northern European countries where there is a stable renewable energy framework (e.g. Germany, Scandinavia) ▲ Investment limits (by % of Portfolio Value at time of acquisition) ○ 50%: assets outside the UK ○ 20%: any single asset ○ 20%: renewable technologies outside onshore wind and solar PV ○ 15%: assets under development / construction
Gearing / Hedging	▲ Non-recourse project finance debt secured on individual assets or groups of assets (up to 50% of Gross Portfolio Value at time of acquisition) ▲ Gearing at fund level limited to an acquisition facility (to secure assets and be replaced by equity raisings) up to 30% of Portfolio Value and normally repaid within 1 year ▲ To adopt an appropriate hedging policy in relation to currency, interest rates and power prices

1. These are targets only and do not represent a profit forecast. There can be no assurance that these targets will be met or that the Company will make any distributions whatsoever or that investors will recover all or any of their investments.
2. As defined in the Prospectus – April 2016
3. Please refer to page 50 of the Company's April 2016 Prospectus for further information on the IRR outlook (available on the Company's website at www.trig-ltd.com)

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