

# QUARTERLY REPORT CFE FIBRA E FIRST QUARTER 2021

*Friday, April 30th, 2021*



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## AGENDA



**CFE FIBRA E executive summary**

***CFE Transmisión* performance indicators**

**Promoted Trust income flow and reimbursements**

**Quarterly Distribution of CFE FIBRA E**

**CFE Capital Administration and Corporate Governance**

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### CFE FIBRA E executive summary

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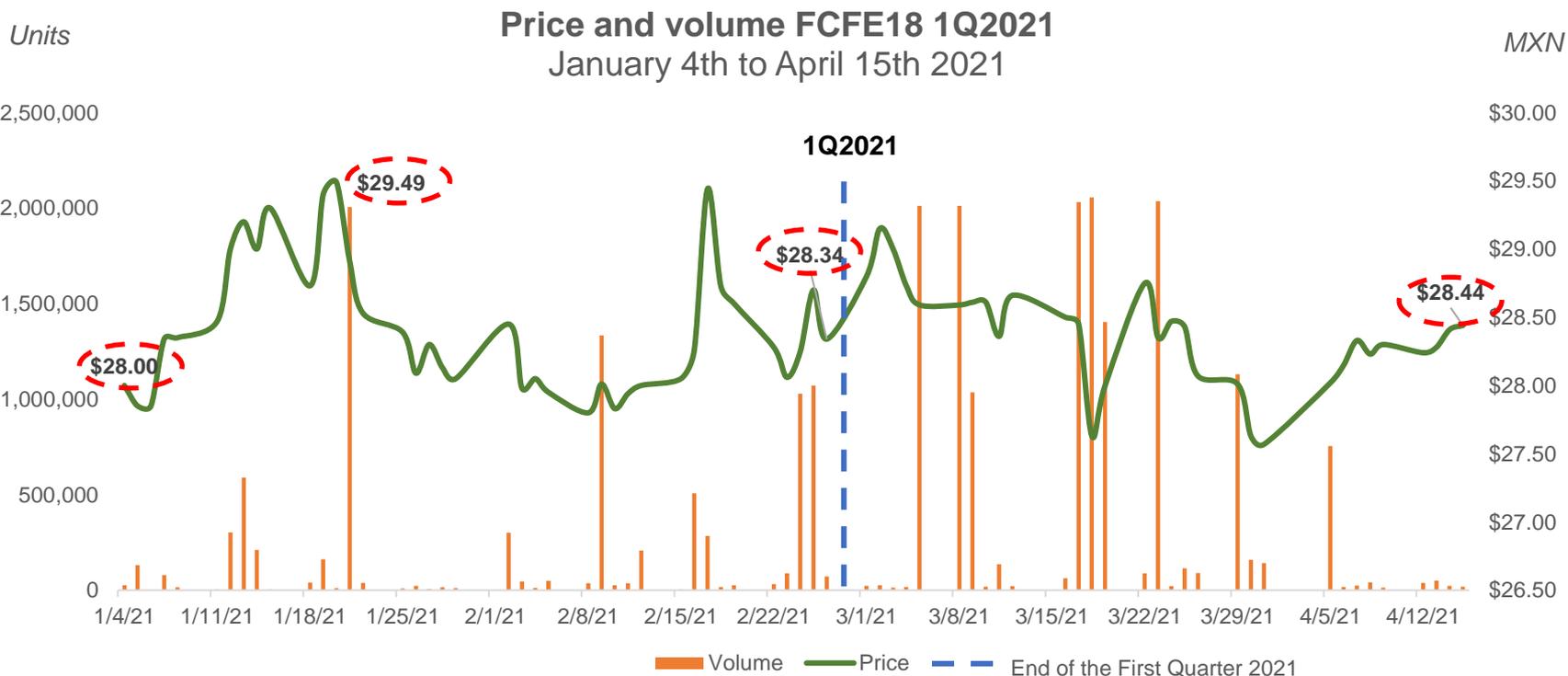
**CFE Capital Administration and Corporate Governance**

# CFE FIBRA E performance



Promoted  
Trust

**CFE  
FIBRA E**



Maximum price  
1Q2021: 01/20/21 **\$29.49**

Price 01/04/21 **\$28.00**  
Price 04/15/21 **\$28.44**

**1Q2021**  
Weighted Average Price **\$28.37**

**1Q2021**  
Average Volume: **176,484**



Source: CFE Capital with information from Bloomberg. Last update: April 15<sup>th</sup>, 2021.

# Most relevant events for CFE FIBRA E



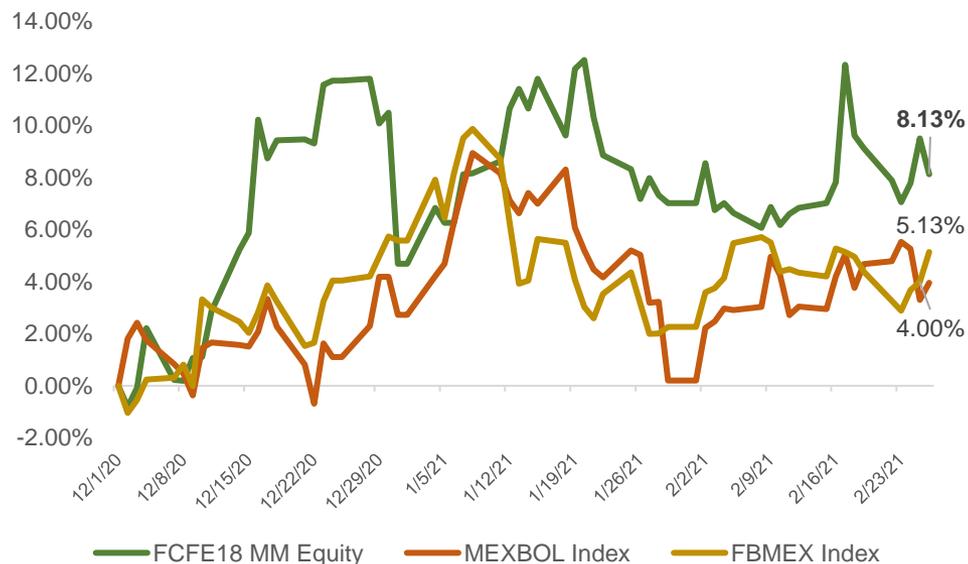
Promoted Trust

**CFE FIBRA E**



- During the study period included in the graph, the price of the FIBRA E certificates showed a yield of **8.13%**, a reflection of the solidity of the instrument and its fundamentals
- During 1Q2021 Banxico decreased the target interest rate by 25 basis points to settle at 4.00%.
- On December 8th, 2020, the CFE published its 2021-2025 Business Plan, which describes its investment program for priority generation, transmission and distribution projects to guarantee Mexico's energy security.

**FCFE18 and comparable Indexes**  
December 1<sup>st</sup>,2020 to February 28<sup>th</sup>,2021



Price 12/01/20	<b>\$26.21</b>
Price 02/28/21	<b>\$28.34</b>



Source: CFE Capital with information from Bloomberg. Last update: February 28th, 2021

# CFE FIBRA E and other REITs Performance

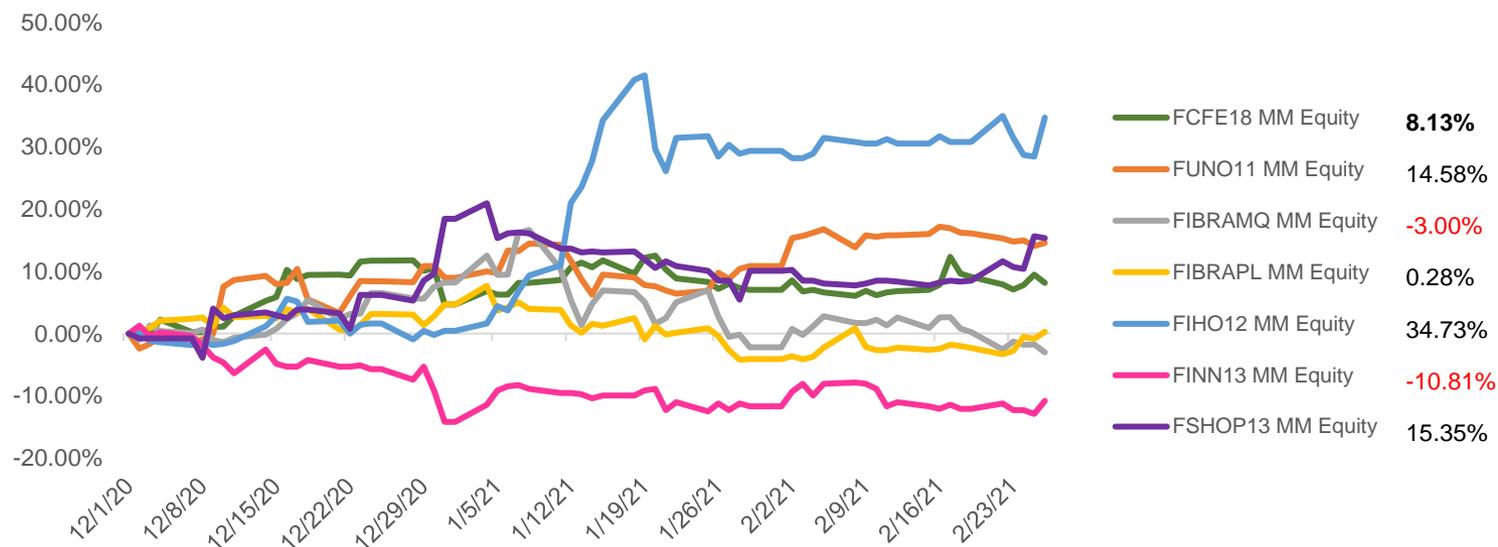


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**CFE FIBRA E vs. REITs Performance**  
December 1st, 2020 to February 28th, 2021



# CFE FIBRA E analyst coverage

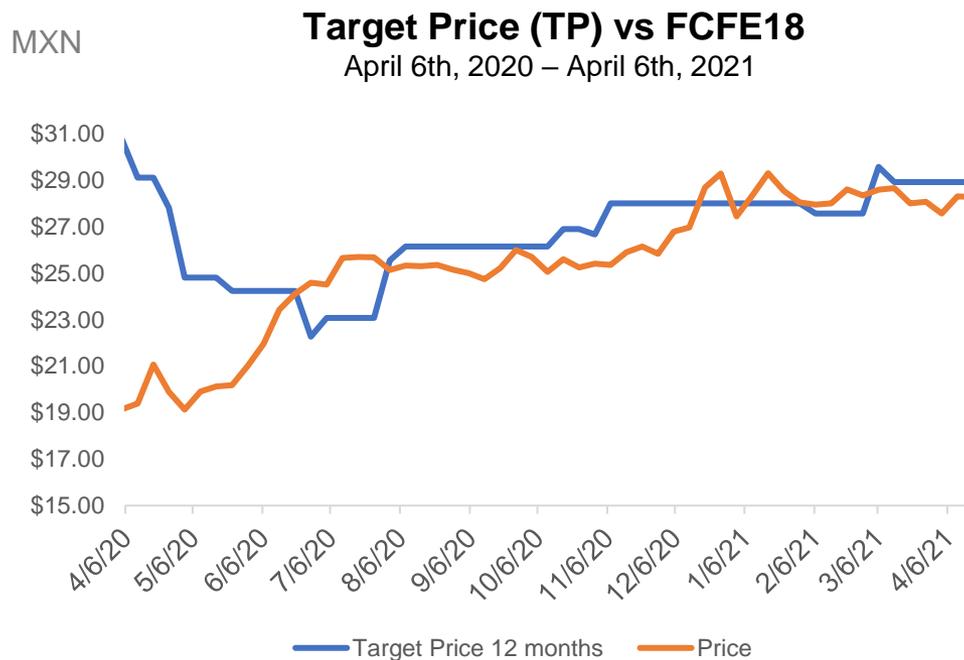


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Analyst	Target Price
BBVA	\$32.20
BARCLAYS	\$27.00
monex	\$33.00
BTGPactual	\$30.50
Morgan Stanley	\$24.00
BANORTE	\$32.50



Average Analyst Target Price: **\$29.87**



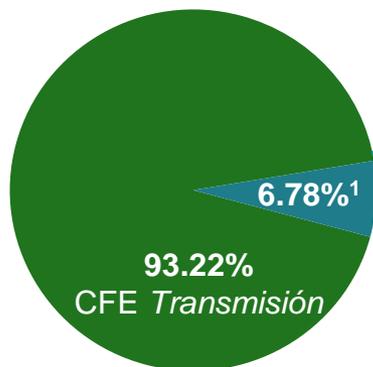
Note: Santander continues as CFE FIBRA E Analyst, however, its target price is still under review.  
Source: CFECapital with information from Bloomberg. (April 15th, 2021)

# CFE FIBRA E revenue sources

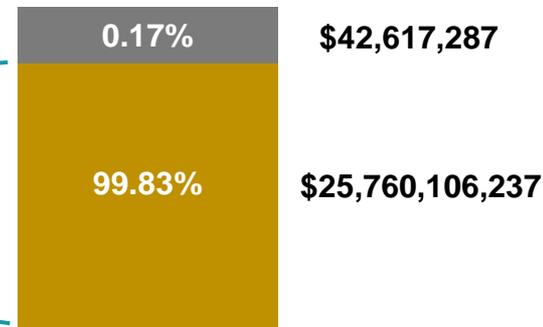


Aside from our initial asset, we did not have other revenue sources for the 1Q2021.

## Beneficiary rights of the Promoted Trust



## CFE FIBRA E Assets as of March 31<sup>st</sup>, 2021 (MXN)



Source: CFECapital. (March 31<sup>st</sup>, 2021).

Note: <sup>1</sup> 6.776103%, rounds to 6.78%. The trustee rights represent economic ownership of the Promoted Trust. Rounded figures.

# Promoted Trust 1Q21 Account Balance



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## Promoted Trust Account Balance as of March 31<sup>st</sup>, 2021

(MXN)

	January	February	March	1Q2021
<b>Initial Balance</b>	<b>771,222,397</b> <sup>(1)</sup>	<b>3,168,803,389</b>	<b>7,113,599,512</b>	
+ Collection Rights	5,204,771,885	5,573,557,246	7,165,257,260	17,943,586,390 <sup>(2)</sup>
– Withdrawals	2,812,439,841	1,641,869,990	1,956,493,060	6,410,802,891 <sup>(3)</sup>
– Distribution to holders	-	-	6,861,407,131	6,861,407,131 <sup>(4)</sup>
<b>Gross Balance</b>	<b>3,163,554,441</b>	<b>7,100,490,645</b>	<b>5,460,956,581</b>	
+ Interest	5,794,747	16,018,086	21,695,536	43,508,369 <sup>(5)</sup>
– Interest tax	1,299,090	3,740,319	5,211,745	10,251,154 <sup>(6)</sup>
<b>Final Balance</b>	<b>3,168,050,098</b>	<b>7,112,768,412</b>	<b>5,477,440,372</b>	
Accrued interest	-753,291	-831,101	1,584,403	
<b>Portfolio Value</b>	<b>3,168,803,389</b>	<b>7,113,599,512</b>	<b>5,475,855,969</b>	

The first quarter began with a balance of \$ 771,222,397 pesos <sup>(1)</sup>, to which was added \$ 17,943,586,390 pesos <sup>(2)</sup> for the collection rights for the period received from CENACE (VAT included) generating interest for \$ 43,508,369 pesos <sup>(5)</sup> and whose income tax amounted to \$ 10,251,154 pesos <sup>(6)</sup>.

Disbursements amount to \$ 13,272,210,022 <sup>(3 + 4)</sup>, corresponding to: (i) reimbursements to CFE Transmisión for \$ 6,410,802,891 <sup>(3)</sup> and <sup>(ii)</sup> Quarterly Distribution for \$ 6,861,407,131 <sup>(4)</sup>, of which \$ 6,396,471,117 were for CFE Transmisión and \$ 464,936,014 for the Issuer Trust.



Source: CFE Capital, with information from Account Balance of Promoted Trust.  
Note: Rounded figures.

# Issuer Trust 1Q21 Account Balance



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## Issuer Trust Account Balance as of March 31<sup>st</sup>, 2021 (MXN)

	January	February	March	1Q2021
<b>Initial Balance</b>	<b>258,930,870</b> <sup>(1)</sup>	<b>235,757,197</b>	<b>234,751,595</b>	
+ Promoted trust distribution	-	-	464,936,014	464,936,014 <sup>(2)</sup>
- Distribution to holders	-	-	651,315,393	651,315,393 <sup>(3)</sup>
- Trust Expenses	24,032,128	1,486,938	7,114,891	32,633,957 <sup>(4)</sup>
<b>Gross Balance</b>	<b>234,898,742</b>	<b>234,088,259</b>	<b>41,257,325</b>	
+ Interest	676,455	663,336	1,359,962	2,699,753 <sup>(5)</sup>
<b>Final balance</b>	<b>235,575,197</b>	<b>234,751,595</b>	<b>42,617,287</b> <sup>(6)</sup>	

The first quarter began with a balance of \$ 258,930,870 <sup>(1)</sup>, which includes the extraordinary distribution for \$ 212,376,610 approved by the Technical Committee of the Promoted Trust in December 2020, to which was added \$ 464,936,014 <sup>(2)</sup> corresponding to the twelfth distribution received on March 16th of the Promoted Trust F / 80758. As of March 31st, disbursements amount to \$ 32,633,957 <sup>(4)</sup>. On the other hand, the amount distributed was for \$ 651,315,393 <sup>(3)</sup>, which was distributed on March 31st.

Distributions as of 1Q2021 total \$ 651,315,393 (Tax profit and Repayment to capital).

The \$ 32,633,957 <sup>(4)</sup> of disbursements correspond to expenses of the Issuing Trust. The ending balance at the end of the quarter was \$ 42,617,287 <sup>(6)</sup>. In the period, interest was generated for \$ 2,699,753 <sup>(5)</sup>.



Source: CFECapital, with information from Account Balance of Issuer Trust up to March 31<sup>st</sup>, 2021.  
Note: Rounded figures.

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# CFE Transmisión performance indicators 2021

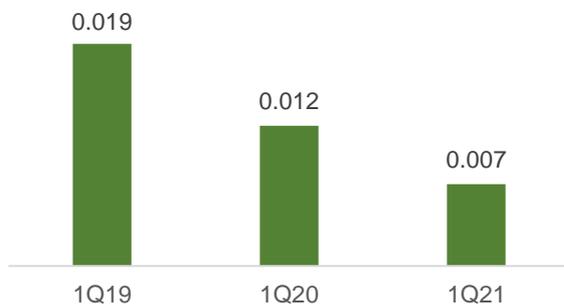


Promoted  
Trust

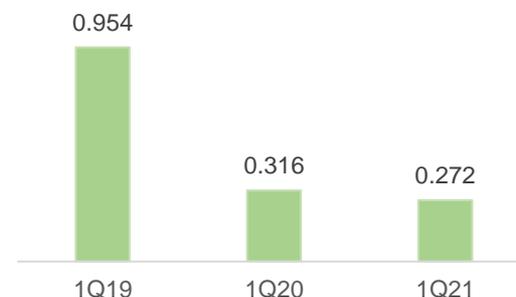
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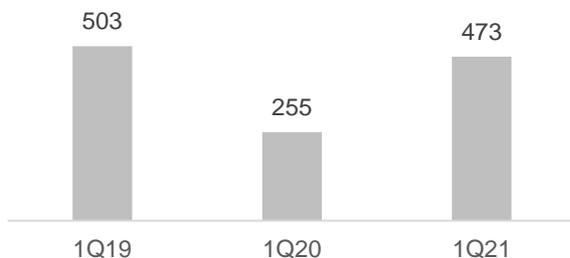
**System Average Interruption Frequency Index<sup>1</sup>**  
(Interruptions)



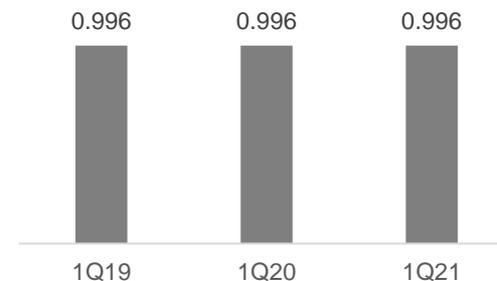
**System Average Interruption Duration Index<sup>2</sup>**  
(Minutes)



**Energy not delivered<sup>3</sup>**  
(MWh<sup>4</sup>)



**Transmission System Availability Index<sup>5</sup>**  
(Percentage)



Source: CFE Transmisión.

Notes: <sup>1</sup>Average number of service interruptions due to failure in the National Transmission Grid (RNT) for a final user. <sup>2</sup>Average interruption duration of electricity supply to a final user. <sup>3</sup>Energy not supplied to users due to interruptions for periods longer than five minutes that occur because of failures in the RNT. <sup>4</sup>Means megawatt-hour, or one thousand kilowatt-hours. <sup>5</sup>Availability of all component elements of the RNT. Information as of March 31<sup>st</sup>, 2021.

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# Collection rights performance on 1Q21. Calendar year

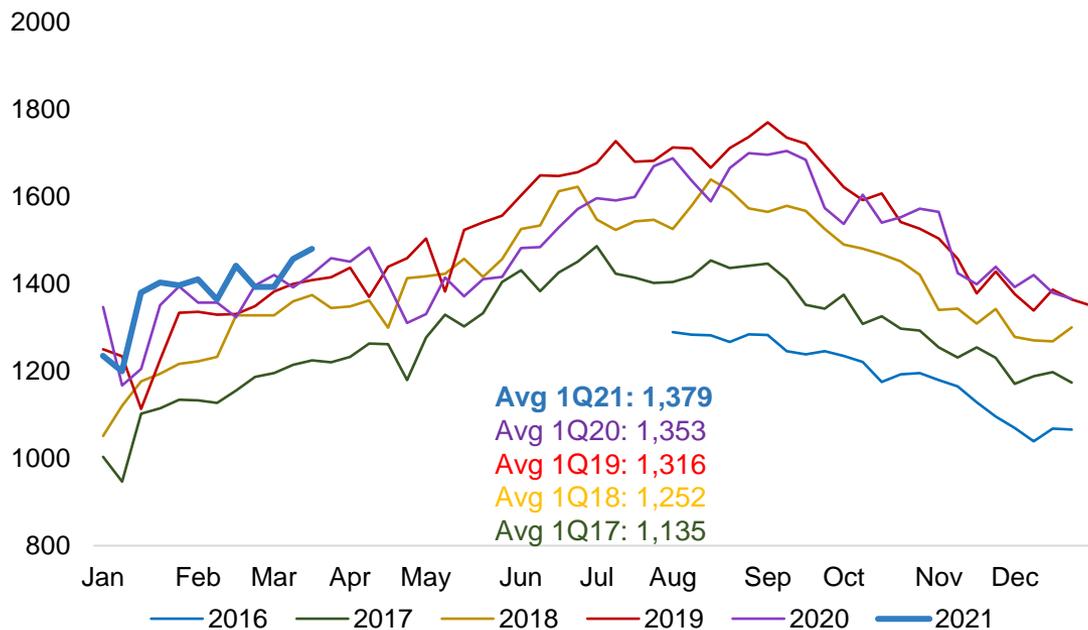


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Collection rights from CENACE<sup>1</sup>  
(Million MXN)



- The weekly average for the first quarter of 2021 of the collection rights increase **1.95%** during 1Q2021 compared to 1Q2020.
- The rate adjustment approved by the Energy Regulatory Commission for transmission services for 2021 was a weighted average of **2.04%**.
- The first quarter of the year corresponds to the period with the lowest demand for electricity due to seasonality.

Note: The figures shown in the chart correspond to the quarterly average of weekly collection rights.



Source: : Head of the Financial Unit of CFE Transmisión. (March 31<sup>st</sup>, 2021. Rounded figures in million MXN.  
Note: <sup>1</sup>Centro Nacional de Control de Energía (CENACE). ) Revenues in the graph include VAT (IVA).

# Reimbursements and collections rights of the Promoted Trust



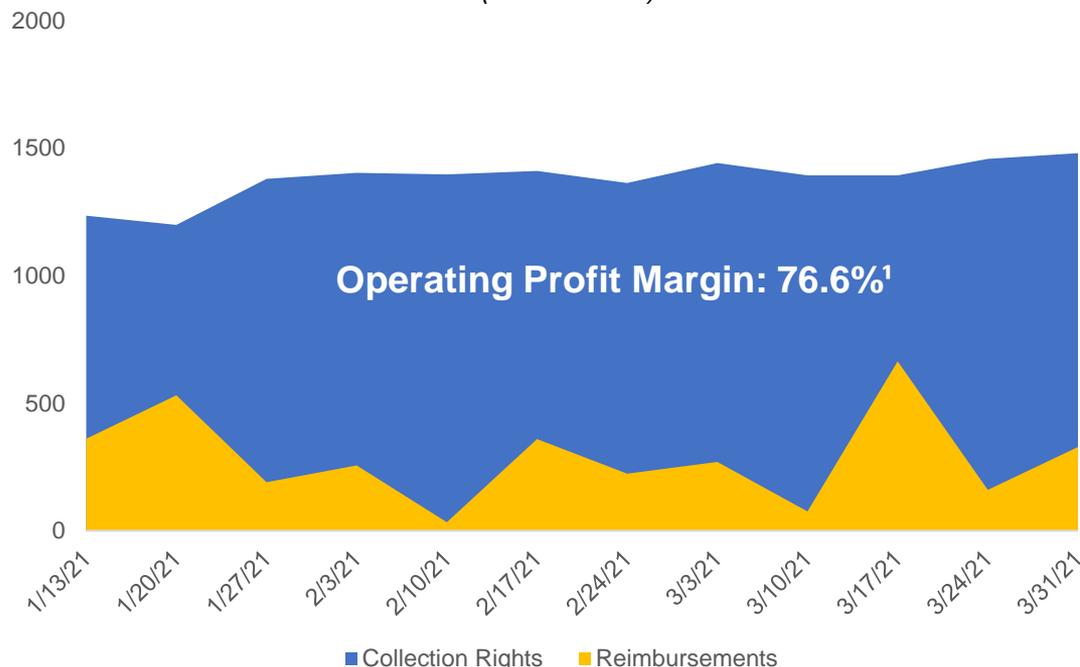
Promoted Trust

CFE FIBRA E



Collection rights without VAT and reimbursements without major maintenance expenses to CFE Transmisión 1Q2021

(Million MXN)



For this indicator during 1Q2021:

- Average weekly collection rights without VAT: **1,189 million MXN.**
- Average weekly reimbursements: **278 million MXN.**
- Average operating profit: **911 million MXN.**

Last update: 03/31/2021. Reimbursements according to annual budget.

Source: Head of the Financial Unit of CFE Transmisión (March, 31st, 2021). Rounded figures in million MXN.

Note: <sup>1</sup>Operating Profit Margin is calculated after subtracting from the collection rights (without considering the VAT account) from reimbursements (includes accounts for settler indemnities, operating and minor maintenance expenses, intercompany operations, expenses for obligations, expenses of the Trust, and financing payments).



# Utilization of Promoted Trust budget



**Promoted  
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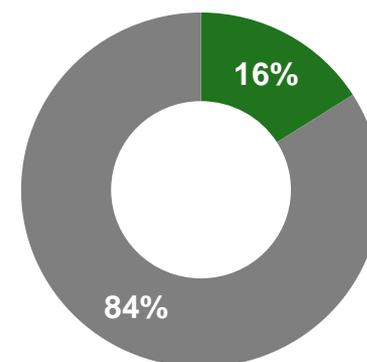
CFE  
FIBRA E



## Reimbursements made until 1Q2021 vs Approved Budget 2021 (MXN)

Category	Budget 2021	Exercised 1Q2021	%
Intercompany expenses	8,331,012,247	881,963,323	11%
Operation and maintenance	7,574,550,788	1,613,124,970	21%
Obligations expenses	3,786,815,105	839,967,771	22%
Major maintenance	1,583,072,360	114,678,835	7%
Trust expenses	17,885,586	4,286,748	24%
Financin costs	0	0	0%
<b>Total</b>	<b>21,293,336,086</b>	<b>3,454,021,647</b>	<b>16%</b>

## Total Budget Utilization



■ Budget utilization ■ Remaining budget

From the total budget approved for 2021, the equivalent of 16% has been exercised, to the first quarter of the year.

Source: Preliminary Financial Statements of the Promoted Trust as of March 31<sup>st</sup>, 2021.  
Note: Rounded figures.

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# Distributed amount to Series "A" and Series "B"



Promoted Trust

CFE FIBRA E



651,315,393

0.00

490,587,361

0.00

160,728,032

0.00

Distribution to CFE Fibra E (6.776103%)	677.31
Restitution to reserve fund <sup>1</sup>	-28.81 <sup>1</sup>
Interests from last period	2.82
Use of distribution ratio	0.00
<b>Distribution amount to holders</b>	<b>651.32</b>

CBFE<sup>2</sup>

Series "A"  
0.575

Series "B"  
0.565

Distributable Amount    Unpaid MQD Series "A"    Distribution Series "A"    Unpaid MQD Series "B"    Distribution Series "B"    Pro rata

Source: Presentation from the 18<sup>th</sup> Session of the Technical Committee of the Issuer Trust (2021).

Note: All information includes VAT, all information in million MXN. <sup>1</sup>As issuer's trust agreement establishes, it must maintain an estimated amount of MXN 45 million expenses reserve fund. Thus, the Trust Technical Committee approved its replenishment.

<sup>2</sup>Certificados Bursátiles Fiduciarios de Inversión en Energía e Infraestructura, CBFE. Rounded figures.

The distribution ratio of 1 / 1.1 provided for in the contract is used to distribute the period and is not kept in cash in the General Account.



# Fiscal treatment of distributions



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## Promoted Trust taxable result 1Q2021 (MXN, accumulative amount)

Income from CENACE	9,291,663,044
Interests	23,397,224
Reimbursements	-2,963,464,380
Intangible asset amortization	-2,941,735,097
Trust Expenses	-1,641,284
<b>Taxable income</b>	<b>3,408,219,507</b>
<b>Capital reimbursements</b>	<b>3,453,187,624</b>
Extraordinary distribution (i)	3,134,199,841
<b>Total distributable amount of the promoted trust</b>	<b>9,995,606,972</b>

## Issuer Trust taxable result 1Q2021 (MXN)

<b>Taxable income from the Promoted Trust</b>	<b>118,748,959</b>
Trust expenses- interests	- 25,997,231 <sup>1</sup>
Issuance expenses amortization	- 8,957,759
<b>Taxable income</b>	<b>83,793,969</b>
<b>Capital Reimbursements</b>	<b>558,563,665</b>
Issuance expenses amortization	8,957,759
<b>Total capital reimbursement</b>	<b>567,521,424</b>
<b>CFE Fibra E Distribution</b>	<b>651,315,393<sup>2</sup></b>

To comply with the tax obligation to distribute at least 95% of the profit, for the fourth quarter 2020 a proportion equivalent to 92.23% of tax profit and 7.77% of equity reimbursement was considered. To offset this effect in the first quarter of 2021, a proportion equivalent to 17.53% of tax profit and 82.47% of equity reimbursement was considered. The Promoted Trust presented, as of the first quarter of 2021, a proportion of 50% profit and 50% repayment of equity.

Source: Technical Committee Presentation of the Promoted and Issuer Trust (March 2021).

Notes: <sup>(i)</sup> The amount corresponds to the extraordinary distribution of the Promoted Trust considers a distributable profit of MXN \$ 1,578,868,524 and MXN \$ 1,555,331,317 of capital reimbursement

<sup>1</sup>The amount corresponding to the estimate of the restitution of the reserve fund amounts to MXN \$ 28,814,461, and the interest for the period amounts to MXN \$ 2,817,230.

<sup>2</sup>The distribution amount is the total of the Tax Income, the Capital Reimbursement and the Amortization of issuance expenses. CENACE income and refunds do not include VAT. It includes the extraordinary distribution of the Promoted Trust F / 80758 that was considered in the distribution on March 31, 2021.

# Composition of the 1Q2021 distribution per CBFE<sup>1</sup>

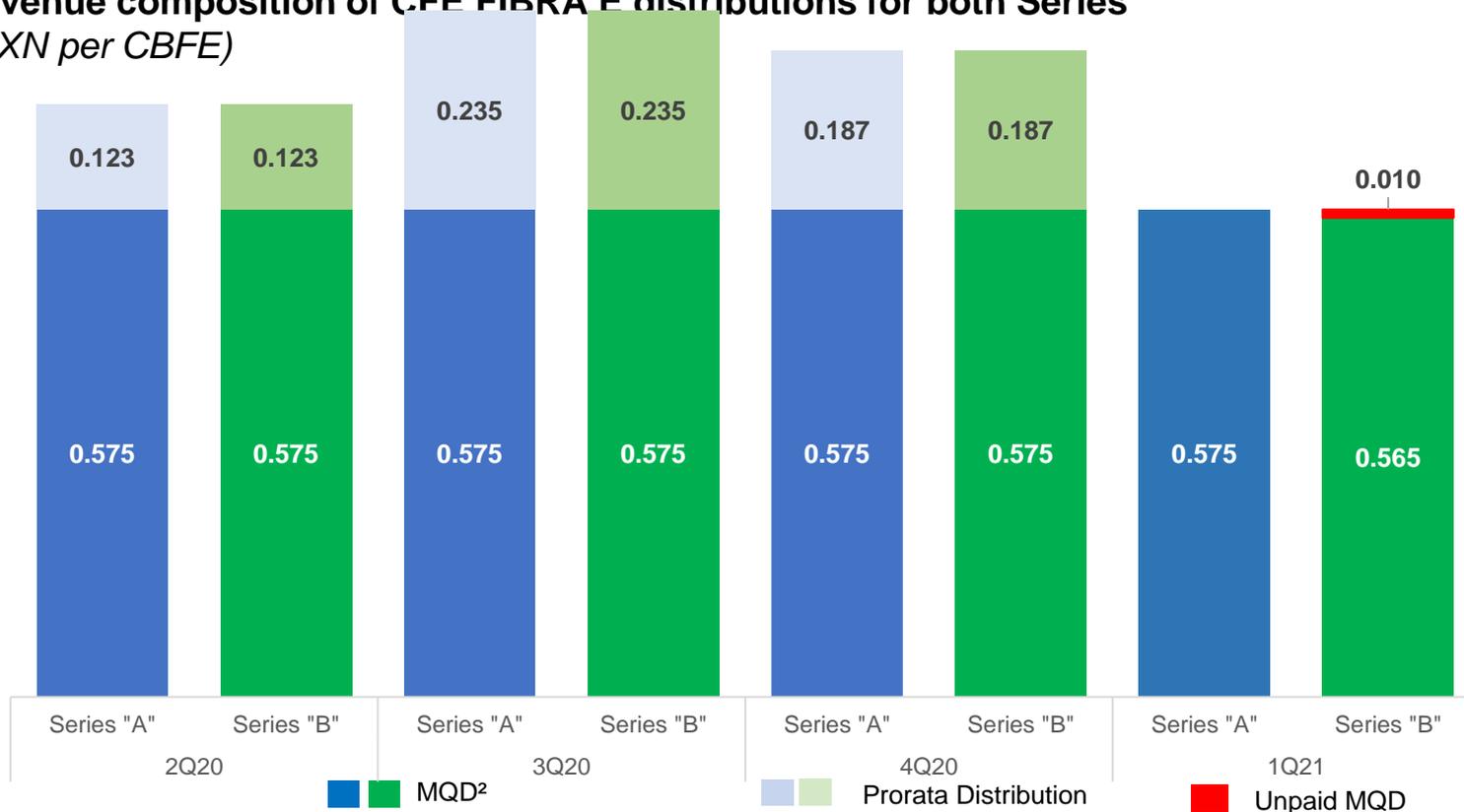


Promoted Trust

CFE FIBRA E



## Revenue composition of CFE FIBRA E distributions for both Series (MXN per CBFE)



Source: Presentation from the 14<sup>th</sup>, 15<sup>th</sup>, 17<sup>th</sup> and 18<sup>th</sup> Session of the Technical Committee of the Issuer Trust (2020 and 2021).

Note: <sup>1</sup>Certificado Bursátil Fiduciario de Inversión en Energía e Infraestructura. CFECapital gives the reimbursement instruction to the Trustee, who makes the deposit to INDEVAL, the central securities depository for the Mexican Securities Market. The custodian acts as the tax withholding agent. <sup>2</sup>Minimum Quarterly Distribution. The total amount of Unpaid MQD per certificate of the series "B" is \$0.01 pesos, which will be effective in the next distribution period. Rounded figures.

# Fiscal composition of 1Q2021 distribution per CBFE<sup>1</sup>

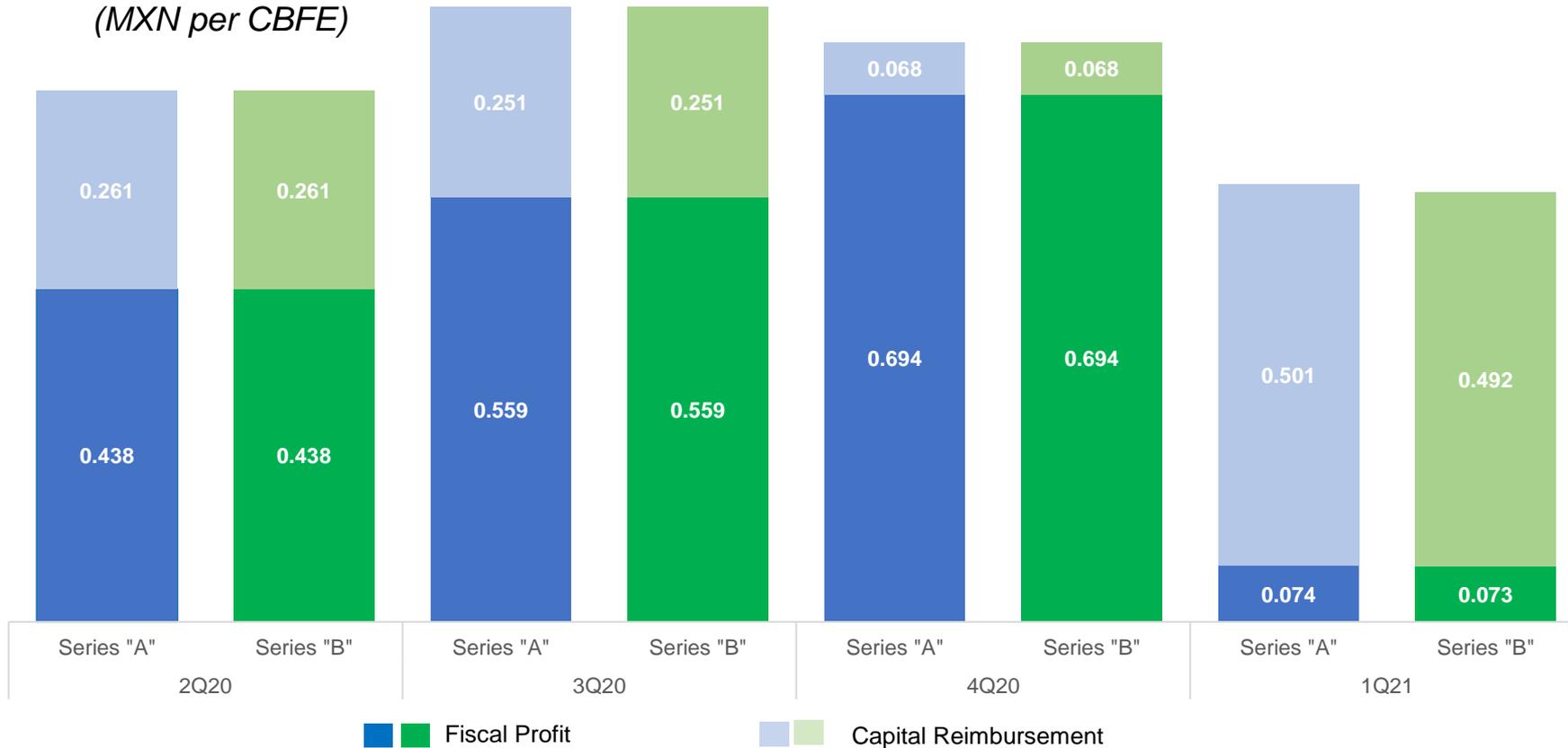


Promoted Trust

CFE FIBRA E



**Fiscal composition of CFE FIBRA E distributions for both Series (MXN per CBFE)**



Source: Presentation from the 14<sup>th</sup>, 15<sup>th</sup>, 17<sup>th</sup> and 18<sup>th</sup> Session of the Technical Committee of the Issuer Trust (2020 and 2021).  
 Note: <sup>1</sup>Certificado Bursátil Fiduciario de Inversión en Energía e Infraestructura. CFE FIBRA E distribution strategy is approved by its Technical Committee and it is determined based on the fiscal requirements for Mexico Income Tax Law. Rounded figures.

# Average collection rights per distribution period

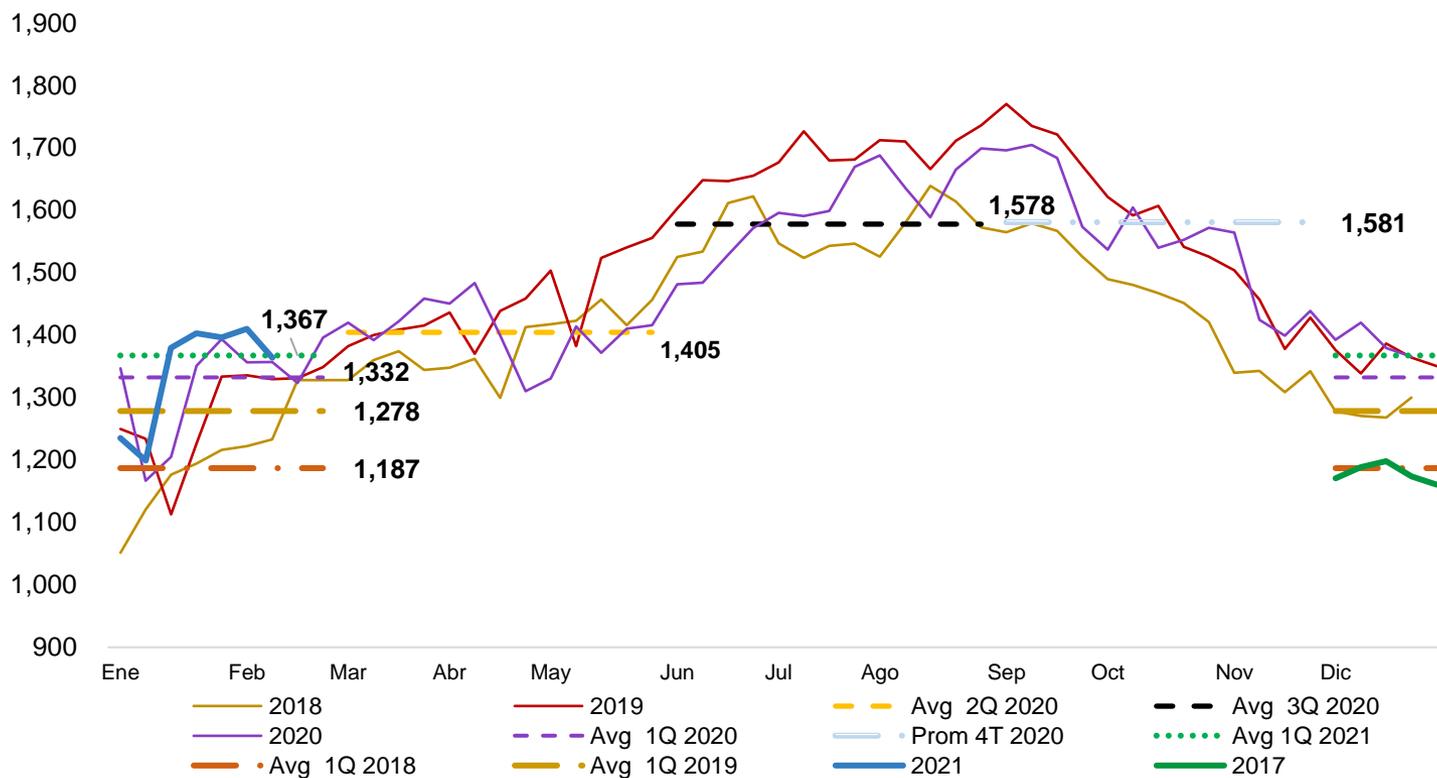


Promoted Trust

CFE FIBRA E



Weekly revenues from CENACE December 2017 – February 2021  
(Million MXN)



Source: Account Balance of the Promoted Trust (Up to February 28th, 2021).

Note: 1Q20 Distribution: December 1st, 2019 to February 29th, 2020; Distribution 2Q20: March 1st to May 31st; Distribution 3Q20: June 1st to August 31st; Distribution 4Q20: September 1st to November 30th; 1Q21 distribution: December 1st, 2020 to February 28th, 2021. Comparisons for 1Q18, 1Q19, 1Q20 consider equivalent periods.



# Issuer Trust 1Q2021 Balance Sheet



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## Issuer Trust Balance Sheet to the first quarter of 2021 (MXN)

	January	February	March
Cash and equivalents	235,575,197	234,751,595	42,617,287 <sup>1</sup>
Fiduciary rights	23,976,318,470	23,997,142,608	25,760,106,237 <sup>2</sup>
Other assets	77,167	-	-
<b>Total assets</b>	<b>24,211,970,834</b>	<b>24,211,894,203</b>	<b>25,802,723,524</b>
Short-term liabilities	35,000	35,000	192,333
<b>Total liabilities</b>	<b>35,000</b>	<b>35,000</b>	<b>192,333</b>
Initial Contribution	1,000	1,000	1,000
Series "A" Distribution	14,089,134,624	14,089,134,624	13,661,663,017
Series "B" Distribution	4,699,173,776	4,699,173,776	4,559,123,959
Distribution taxable income	- 5,143,106,937	- 5,143,106,937	- 5,226,900,905
Result of exercise	- 23,222,057	- 23,298,688	2,218,688,692
Result of previous exercise	10,589,955,428	10,589,955,428	10,589,955,428
<b>Total equity</b>	<b>24,211,935,834</b>	<b>24,211,859,203</b>	<b>25,802,531,191</b>
<b>Total liabilities</b>	<b>24,211,970,834</b>	<b>24,211,894,203</b>	<b>25,802,723,524</b>

In the first quarter of 2021, the trust rights amount to \$ 25,760,106,237<sup>(2)</sup>. Which represent 99.83% of the total assets of the CIB / 2919 Trust, the remaining 0.17% for \$ 42,617,287<sup>1</sup> is kept in cash and equivalents.



Source: CFECapital with information from the Promoted Trust account statements up to March 31<sup>st</sup>, 2021.  
Note: Rounded figures.

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# Administrator expenditures 1Q2021



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## Maintenance expenses (MXN)

	January	February	March	1Q2021	Accumulated
Administration fee <sup>i</sup>	22,812,932	-	-	22,812,932 <sup>(1)</sup>	22,812,932
Fiduciary and common representation fees	238,049	585,378	-	823,427	83,427
Independent members fees	65,000	65,000	357,190	487,190	487,190
Expenditures of maintenance and registration of CBFES	-	-	1,657,527	1,657,527	1,657,527
External audit fees, accounting services, fiscal advisers and any other professional services	657,427	787,640	5,065,174	6,510,241	6,510,241
Insurance	-	-	-	-	-
External Audit fees tax	258,720	35,000	35,000	328,720	328,720
Other expenses	-	13,920	-	13,920	13,920
<b>Total</b>	<b>24,032,128</b>	<b>1,489,938</b>	<b>7,114,891</b>	<b>32,633,957 <sup>(2)</sup></b>	<b>32,633,957</b>

In the first quarter, expenses amounted to \$32,633,957 pesos<sup>(2)</sup>, this amount includes the Administrator Expenses amounting to \$22,812,932 pesos<sup>(1)</sup> and the rest of maintenance expenses for \$9,821,025 pesos.

<sup>i</sup> Includes the payment of advances to CFECapital and the 7% administration commission. The amount of administration commission corresponds to \$1,492,435 pesos.

Rounded Figures

Source: Finance and Administration Management, CFECapital.

# Corporate Governance Activities

## Promoted Trust



On March 8, 2021, in the 13th ordinary session of the Technical Committee of the Promoted Trust, the following agreements were carried out:

- **Report of the reimbursement and reliquidation instructions delivered by the Settlor to the Trustee.**
- **Review and reconciliation of the reimbursements made to the Settlor and calculation of the distributions to be made to the Trustees, in proportion to their Holding Factor.**
- **Budget and, where appropriate, approval of the amendment to AGREEMENT SE02-17112020-A08, regarding the annual budget of the Trust corresponding to fiscal year 2021.**
- **Presentation of the Financial Statements of the Trust.**
- **Presentation of the calendar of activities of the Trust corresponding to the year 2021.**

## Issuer Trust



On March 16, 2021, at the 18th session of the Technical Committee of the Issuing Trust, the following agreements were carried out:

- **Approval of the Amount to Distribute, as well as the Distribution by CBFE of Series "A" and Series "B" corresponding to 1Q21.**
- **Approval prior recommendation made by the Audit Committee, the financial statements of the Trust, corresponding to fiscal year 2020, for presentation to the Holders' Meeting.**
- **Approval of the renewal of liability insurance policies, for a period of thirteen months, for "CFE Capital, S. de R.L. de C.V. and its main officials; the members of any Committee of the Issuing Trust; the Irrevocable Administration and Payment Source Trust Number 80758 and the members of any of its Committees; as well as any eligible entity (including the members of their respective Committees) or external advisor that it is necessary to appoint, in the terms presented.**

### Audit Committee

On March 16, 2021, the 13th session was held where the following agreements were made:

- **Based on the provisions of Clause XII, section 12 01 subsection of the Irrevocable Trust Agreement Number CIB / 2919, the Audited Financial Statements of the Trust, corresponding to fiscal year 2020, are considered as revised and their recommendation is made to the Technical Committee for presentation to the Holders Assembly.**
- **Ratification of the Advisor to the Audit Committee.**

# Foreseeable future



Promoted  
Trust

CFE  
FIBRA E



June 30<sup>th</sup>, 2021: 2Q2021 distribution



\*July 30<sup>th</sup>, 2021: 2Q2021 Investor Call

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***CFE/Capital***

# QUARTERLY REPORT CFE FIBRA E FIRST QUARTER 2021

*Friday, April 30rd, 2021*