

To: Bucharest Stock Exchange

Announcement

Date of report:	11.08.2025
Name of the Company:	Meta Estate Trust S.A.
Registered office:	4-10 Muntii Tatra Street, 4th Floor, District 1, Bucharest, Romania
E-mail:	investors@meta-estate.ro
Phone/fax:	+40 372 934 455
Website:	www.metaestate.ro
Trade Registry No.:	J2021004004401
Fiscal Code:	43859039
Subscribed and paid share capital:	RON 129,665,940
Total number of shares:	129,665,940 shares, of which 118,415,964 ordinary class "A" shares and 11,249,976 preference class "B" shares
Symbol:	MET
Market where securities are traded:	SMT AeRO Premium

Meta Estate Trust S.A. announces the release of a detailed analysis of the risks associated with real estate investments in Romania, based on experience gained from over 42 projects, providing investors with tools and recommendations to effectively navigate the risks in the sector.

Alexandru Bonea
CEO

Meta Estate Trust launches the first fundamental analysis of the risks associated with real estate investments in Romania, based on the experience of over 42 projects

Press Release

Bucharest, July 30, 2025

Meta Estate Trust (stock symbol MET), a holding company active in the real estate sector, acting as a portal between the real estate market and the capital market, launches a reference analysis on the real investment risks in the residential sector.

This is the first time that a company engaged in systematic real estate investments publishes a comprehensive report on the major traps that can affect investor capital, focusing on hidden risks that are hard to identify without direct field expertise, while also exploring solutions to navigate these risks. "In the Romanian real estate market, investors lose more money due to lack of information than from economic fluctuations. The Nordis case was not the first, and it certainly won't be the last." – **Alexandru Bonea, Co-Founder & CEO of Meta Estate Trust.**



Founded on the practical experience of over 42 investments carried out in the past four years, this launch comes at a critical moment for investor education, as confidence in the residential sector is being tested and the need for objective risk evaluation tools becomes essential for protecting both private and institutional capital.

Key Findings from the Analysis:

- 1. Risk of Non-completion** – the invisible danger that can completely nullify an investment. The biggest risk is not related to price decreases, but to projects that are never completed.
- 2. Information Asymmetry Between Developers and Investors.** The lack of transparency regarding the financial situation, legal risks, or the developer's experience is one of the biggest vulnerabilities of the market.
- 3. Management Quality** – the criterion that outweighs any other risk factor. A competent developer can manage unforeseen crises, but weak management compromises any project, regardless of initial premises.
- 4. The 20 Lei Test That Can Save Hundreds of Thousands.** The land registry extract – a simple and inexpensive check – can reveal hidden mortgages or clauses that annul property rights.
- 5. Romania, a Rigid Market Vulnerable to Shocks.** With 51% of household budgets allocated to basic needs and a negative savings rate (-6.8%), the local real estate market is much more exposed than the European average.

Meta Estate Trust's expertise is validated by a solid four-year track record in the real estate market, during which the company analyzed and implemented over 42 projects. Of these, 20 have already been completed with successful exits, contributing to a cumulative net profit of over 6 million euros. The financial performance is also reflected in the returns generated, with internal rates of return (IRR) ranging from 12% to 42%.

A Differentiating Material: Expertise Beyond Theory

Unlike the predominantly theoretical information available on the Romanian market, the Meta Estate Trust study reflects the concrete experience of a company that has systematically invested in real estate as an institutional investor. The conclusions are built on real lessons learned from both successful projects and those that exposed major risks.

The analysis provides a clear map of the main traps in real estate investments and offers concrete recommendations for evaluating risks – legal, financial, management, and commercial. Thus, the Meta Estate Trust analysis serves as an indispensable tool for investors, professionals in the field, and the general public interested in the real estate sector.

Free Access to the Full Analysis: Available now at www.metaestate.ro, the analysis can be downloaded for free by anyone wishing to make informed decisions in an increasingly unpredictable market.

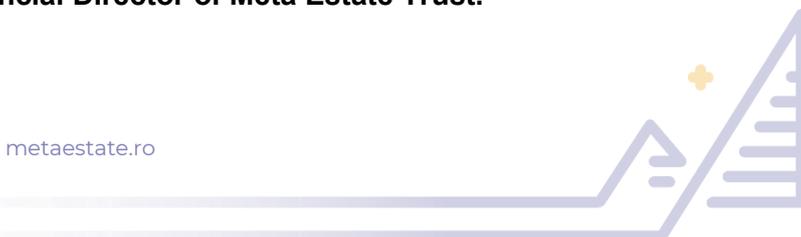
"The Romanian real estate market is not lacking enthusiasm, but understanding of the risks. And the most dangerous risk is the one you don't know you're assuming. The analysis we're publishing today is a signal of responsibility and a protection tool for investors who no longer want to rely on instinct or image. For us, risk is not an obstacle – it is a variable that must be understood, measured, and managed. In real estate, the difference between profit and loss is often made before the signature – through the quality of the analysis." – adds **Bogdan Gramanschi, Financial Director of Meta Estate Trust.**

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About Meta Estate Trust:

Meta Estate Trust is a holding company active in the real estate sector, founded in March 2021 by a group of Romanian entrepreneurs with experience in real estate and the capital market. Since August 29, 2022, Meta Estate Trust has been listed on the Bucharest Stock Exchange in the AeRO market, with the stock symbol MET. Since March 20, 2023, MET shares have been included in the BETAeRO index. The investment policy is based on a mix of investment typologies with different yield and risk profiles, with a diversified and flexible portfolio that can easily adapt to market cycles.

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