VONTIER™

Powering the way the world moves

Convenience Retail Technology Showcase

15 October 2025

Powering the way the world moves

Welcome, Opening Remarks, & Agenda

Ryan Edelman
Vice President, Investor Relations

Safe Harbor and Forward-Looking Statements

This release contains forward-looking statements within the meaning of the federal securities laws. These statements include, but are not limited to statements regarding Vontier Corporation’s (the “Company’s”) anticipated sales growth and anticipated adjusted net earnings per share, and any other statements identified by their use of words like “anticipate,” “expect,” “believe,” “outlook,” “guidance,” or “will” or other words of similar meaning. There are a number of important risks and uncertainties that could cause actual results, developments and business decisions to differ materially from those suggested or indicated by such forward-looking statements and you should not place undue reliance on any such forward-looking statements. These risks and uncertainties include, among other things, deterioration of or instability in the economy, the markets we serve, changes in U.S. and international geopolitics, including trade policies, volatility in financial markets, contractions or lower growth rates and cyclicality of markets we serve, competition, changes in industry standards and governmental policies and regulations that may adversely impact demand for our products or our costs, our ability to successfully identify, consummate, integrate and realize the anticipated value of appropriate acquisitions and successfully complete divestitures and other dispositions, our ability to develop and successfully market new products, software, and services and expand into new markets, the potential for improper conduct by our employees, agents or business partners, impact of divestitures, contingent liabilities relating to acquisitions and divestitures, impact of changes to tax laws, our compliance with changes in applicable laws and regulations, risks relating to global economic, political, war or hostility, public health, legal, compliance and business factors, risks relating to potential impairment of goodwill and other intangible assets, currency exchange rates, tax audits and changes in our tax rate and income tax liabilities, the impact of our debt obligations on our operations, litigation and other contingent liabilities including intellectual property and environmental, health and safety matters, our ability to adequately protect our intellectual property rights, risks relating to product, service or software defects, product liability and recalls, risks relating to product manufacturing, our relationships with and the performance of our channel partners, commodity costs and surcharges, our ability to adjust purchases and manufacturing capacity to reflect market conditions, reliance on sole sources of supply, security breaches or other disruptions of our information technology systems, adverse effects of restructuring activities, impact of changes to U.S. GAAP, labor matters, and disruptions relating to man-made and natural disasters. Additional information regarding the factors that may cause actual results to differ materially from these forward-looking statements is available in our SEC filings, including our Annual Report on Form 10-K for the year ended December 31, 2024. These forward-looking statements represent Vontier’s beliefs and assumptions only as of the date of this release and Vontier does not assume any obligation to update or revise any forward-looking statement, whether as a result of new information, future events and developments or otherwise.

Non-GAAP Financial Measures

This presentation contains references to “core sales growth,” “adjusted free cash flow,” “adjusted free cash flow conversion,” “adjusted diluted net earnings per share,” and “net leverage ratio” financial measures which are, in each case, not presented in accordance with generally accepted accounting principles.

- Core sales growth refers to the change in total sales calculated according to GAAP but excluding (1) sales from acquired and certain divested businesses; (2) the impact of currency translation; and (3) certain other items. References to sales attributable to acquisitions or acquired businesses refer to GAAP sales from acquired businesses recorded prior to the first anniversary of the acquisition less the amount of sales attributable to certain divested or exited businesses or product lines not considered discontinued operations. The portion of sales attributable to the impact of currency translation is calculated as the difference between (a) the period-to-period change in sales (excluding sales from acquired businesses) and (b) the period-to-period change in sales, including foreign operations (excluding sales from acquired businesses) after applying the current period foreign exchange rates to the prior year period. The portion of sales attributable to other items is calculated as the impact of those items which are not directly correlated to core sales which do not have an impact on the current or comparable period.
- Adjusted free cash flow refers to cash flow from operations calculated according to GAAP but excluding capital expenditures, adjusted for cash received from the sale of property, plant and equipment and cash paid for Restructuring- and divestiture-related adjustments, transaction- and deal-related costs and Other charges. Adjusted free cash flow conversion refers to adjusted free cash flow divided by adjusted net earnings.
- Adjusted net earnings refers to net earnings calculated in accordance with GAAP, but excluding on a pretax basis amortization of acquisition-related intangible assets, Restructuring- and divestiture-related adjustments, transaction- and deal-related costs, asbestos-related adjustments associated with certain divested businesses, one-time costs related to the separation, amortization of acquisition-related inventory fair value step-up, gains and losses on sale of property, Other charges, non-cash write-offs of deferred financing costs, gains and losses on sale of businesses and gains and losses on investments, including the tax effect of these adjustments and other tax adjustments. The tax effect of such adjustments was calculated by applying our estimated adjusted effective tax rate to the pretax amount of each adjustment. Adjusted diluted net earnings per share refers to adjusted net earnings divided by the weighted average diluted shares outstanding.
- EBITDA refers to net earnings calculated in accordance with GAAP, excluding interest, taxes, depreciation and amortization of acquisition-related intangible assets. Adjusted EBITDA refers to EBITDA adjusted for Restructuring- and divestiture-related adjustments, transaction- and deal-related costs, asbestos-related adjustments associated with certain divested businesses, one-time costs related to the separation, amortization of acquisition-related inventory fair value step-up, gains and losses on sale of property, Other charges, non-cash write-offs of deferred financing costs, gains and losses on sale of businesses and gains and losses on investments. Adjusted EBITDA percentage refers to Adjusted EBITDA divided by net sales calculated in accordance with GAAP.
- Net leverage ratio refers to net debt divided by Adjusted EBITDA.
- Return on invested capital is calculated as the weighted average of 1) the net operating profit after tax for acquisitions, divided by the purchase price; and 2) the weighted average share repurchase price divided by the ending share price at the end of each quarter.

The Company has not reconciled the forward-looking statements regarding core sales growth, adjusted diluted net earnings per share, Adjusted EBITDA Adjusted EBITDA percentage, adjusted free cash flow and adjusted free flow conversion because both the corresponding GAAP measures and the reconciliation thereto would require the Company to make estimates or assumptions about unknown currency impact, unidentified acquisitions and similar adjustments during the relevant period that could not be determined without unreasonable effort.

Non-GAAP financial measures should not be considered in isolation or as a substitute for the GAAP financial measures but should instead be read in conjunction with the corresponding GAAP financial measures. The historical non-GAAP financial measures used by the Company in this presentation may be different than similarly-titled non-GAAP measures used by other companies. Reconciliations of historical non-GAAP financial measures can be found on the investor relations section of our website at www.investors.vontier.com.

We report our financial results in accordance with GAAP. However, we present certain non-GAAP measures, as described above, which are not recognized financial measures under GAAP, because we believe they assist investors and analysts in comparing our operating performance across reporting periods on a consistent basis by excluding items that we do not believe are indicative of our core operating performance. Management believes these measures are helpful in highlighting trends in our operating results, while other measures can differ significantly depending on long-term strategic decisions regarding capital structure and allocation, the tax jurisdictions in which companies operate and capital investments and acquisitions.

Today's Agenda

8:00am **Welcome, Opening Remarks, Agenda**
Ryan Edelman
Vice President, Investor Relations

8:05am **Vontier Enterprise Strategy**
Mark Morelli
President & Chief Executive Officer

8:35am **Modern Convenience Retail**
Mark Morelli
President & Chief Executive Officer

Integrated Forecourt & Retail Solutions
Mark Williams
President, Forecourt Solutions

Enabling Energy Expansion
Andy Bennett
President, Convenience Retail

Scaling Growth in Car Wash
Devon Watson
President, Car Wash Solutions

Connected Mobility Strategy – Integrated Solutions
Austin Lieb
Chief Product Officer, Convenience Retail

9:45am **Q&A Session**

9:55am **Break**

10:05am **Industry Panel**
Tracy Long – CEO, D&H United
Dan Munford – CEO Insight Research
Elaine Mohr – GM Operations, Shell Mobility Americas
Moderator: Elaine Kanak, Chief Marketing Officer

10:35am **Financial Update**
Anshooman Aga
Chief Financial Officer

10:50am **Q&A Session**

11:05am **Transition to Show Floor**

11:15am **Booth Tour**

12:30pm **Showcase Concludes**

VONTIER™

Powering the way the world moves

Vontier Enterprise Strategy

Mark Morelli

President & Chief Executive Officer

Executive Summary

What you will hear today…

1. A More-Focused Vontier
2. Leading Positions in Attractive End Markets
3. Well Positioned to Lead the Evolution of Convenience Retail
4. Executing on Our Connected Mobility Strategy to Accelerate Growth
5. Unlocking Value for Our Customers and Shareholders

Vontier – Powering the Way the World Moves

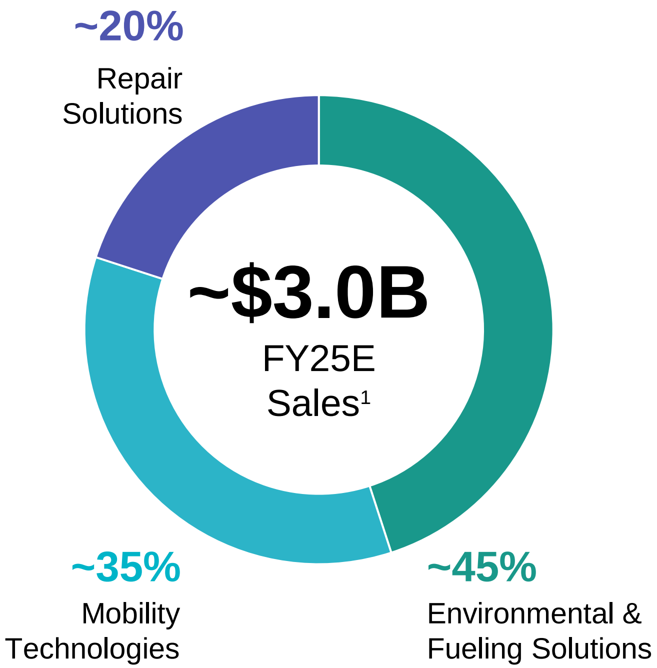
Trusted partner transforming complexity into productivity and growth at scale

Vontier **powers customer operations with integrated site-wide solutions** – uniting hardware, software and data to drive uptime, productivity, consumer engagement, and revenue – leveraging our unique market leadership and unprecedented depth & breadth

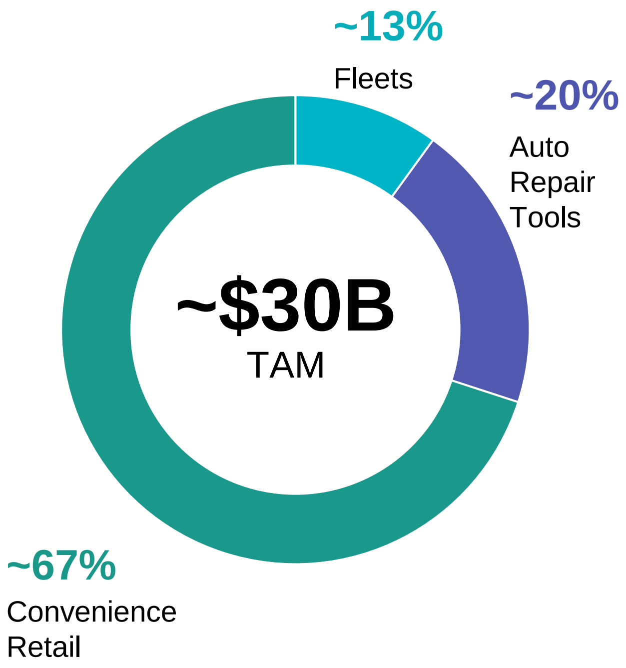
Vontier – At a Glance

Leading supplier of critical technologies & solutions to the mobility ecosystem

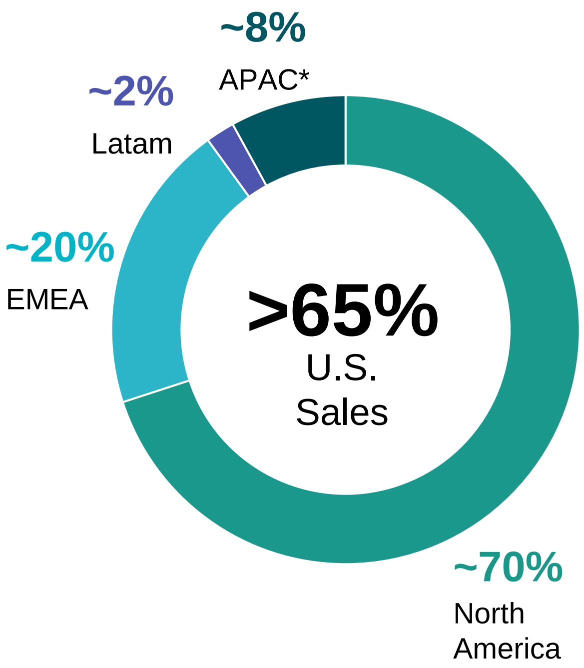
Business Segments



End Markets



Geography



*APAC includes China at ~1%

1. FY 2025 Total Sales Guidance Midpoint

Vontier's Transformation Journey

Disciplined approach building synergy, recurring revenues, & capabilities to lead the mobility ecosystem

2020 → 2025

Focus

- Spun out as a **Hardware-Centric, decentralized portfolio**
- **Gained share through US EMV roll-off**
- **Launched our** 80/20 initiatives
- Divested non-core assets; **Acquired bolt-on businesses** – Driivz, DRB, Invenco
- Launched **Connected Mobility Strategy**

Scale

- Built global **Software factory** (500 → 1,200+ software engineers)
- Invested in product innovation - **performance, features, compute, connectivity**
- Launched **site orchestration platforms** (iNFX, HUB)

Today

- **3 synergistic end markets:** Convenience Retail, Fleets, Auto Repair Tools
- **Recurring revenues ~30%** and growing
- Positioned as **Mobility Ecosystem Solutions Leader**

Highly Attractive and Growing End Markets

Infrastructure needed to keep vehicles in operation moving safely, sustainably, frictionlessly

Convenience Retail

~$11B, +L/MSD CAGR

- Market consolidation & site modernization driving significant capex investment
- Expanding energy needs and consumer preferences amplifying complexity

Fleet Solutions

~$11B, +HSD/DD CAGR

- Increasing complexity arising from multi-energy fleets
- Increasing need for solutions that enhance productivity, safety and compliance

Auto Repair Tools

~$8B, +L/MSD CAGR

- Aging US vehicle parc driving higher repair demand
- Powertrain & advanced vehicle technology increasing scope and complexity of repair

Leading Positions Across End Markets

Operating in 50 countries with deep domain expertise and unmatched portfolio breadth

Convenience Retail

#1
Fueling Solutions

GILBARCO VEEDER-ROOT
Powered by Vontier

~260K Sites | 155+ Years | EFS

#1
Point-of-Sale Car Wash

DRB
Powered by Vontier

~20K Sites | 40+ Years | MT

#2
Point-of-Sale Convenience Store

invenco
Powered by Vontier

~65K Sites | 15+ Years | MT

#2
EV Charging Software

driivz
Powered by Vontier

~110K Plugs | 15+ Years | MT

Fleet Solutions

#1
Compressed & Renewable Gas in NA

ANGI
Powered by Vontier

~2,400 Sites | 40+ Years | MT

#1
Fleet Management Solutions in AUS & NZ

Teletrac Navman
Powered by Vontier

~750K Assets | 35+ Years | MT

Auto Repair Tools

#2
Auto Repair & Diagnostics

MATCO TOOLS
Powered by Vontier

~150K Shops | 80+ Years | RS

EFS = Environmental & Fueling Solutions; MT = Mobility Technologies; RS = Repair Solutions

Durable Secular Tailwinds

Several key trends impacting the mobility ecosystem

Digitalization

- Expectations for **seamless, connected experiences**
- **Integrated platforms** spanning assets, payments, workflow to reduce complexity, costs
- **Data, AI, Automation** driving productivity, decision making

Regulations & Compliance

- **Payments and data security** across convenience retail & fleets
- **Compliance and certification** requirements raising complexity
- **Environmental & safety regulations –** fuels, emissions, driver safety

Energy Expansion

- **Multi-energy Infrastructure required –** Traditional fuels, bio-fuels, EV & CNG/RNG
- **Integration & reliability –** Uptime, utilization, demand management
- **Energy management –** optimizing availability and costs

Secular Shifts – Real World Challenges for Customers

These shifts create pain points for our customers that cannot be solved with point solutions

Digitalization

- Integration challenges
- Lack of actionable insights

*I want to be able to action in near real time, I also want to store that historically to **gather trends over time**… I want to be able to **control every aspect independently and remotely***

RaceTrac

Regulations & Compliance

- Implementation cost & timing
- Risk of business disruption

*One of the key calls to action for customers is **to partner with technology companies** to develop the tools and platforms necessary to meet regulatory requirements efficiently…*

CIRCLE K

Energy Expansion

- Infrastructure upgrade
- Uptime challenges

*We need a SW platform through which we can **integrate new energy offerings (CNG, LNG, H2, EVs)** …that we can **seamlessly connect to payment systems, loyalty programs**, and enhance consumer experience*

Shell

3-Pillar Value Creation Framework

We drive value through organic growth, operational excellence, and strategic capital deployment

Accelerating
Organic Growth

- Connected Mobility Strategy
- Impactful innovation
- Platform strategies
- Driving increased recurring revenues

Optimizing
Margin Expansion

- Driving operational excellence through VBS
- Focus and prioritization (80/20)
- Improved portfolio mix

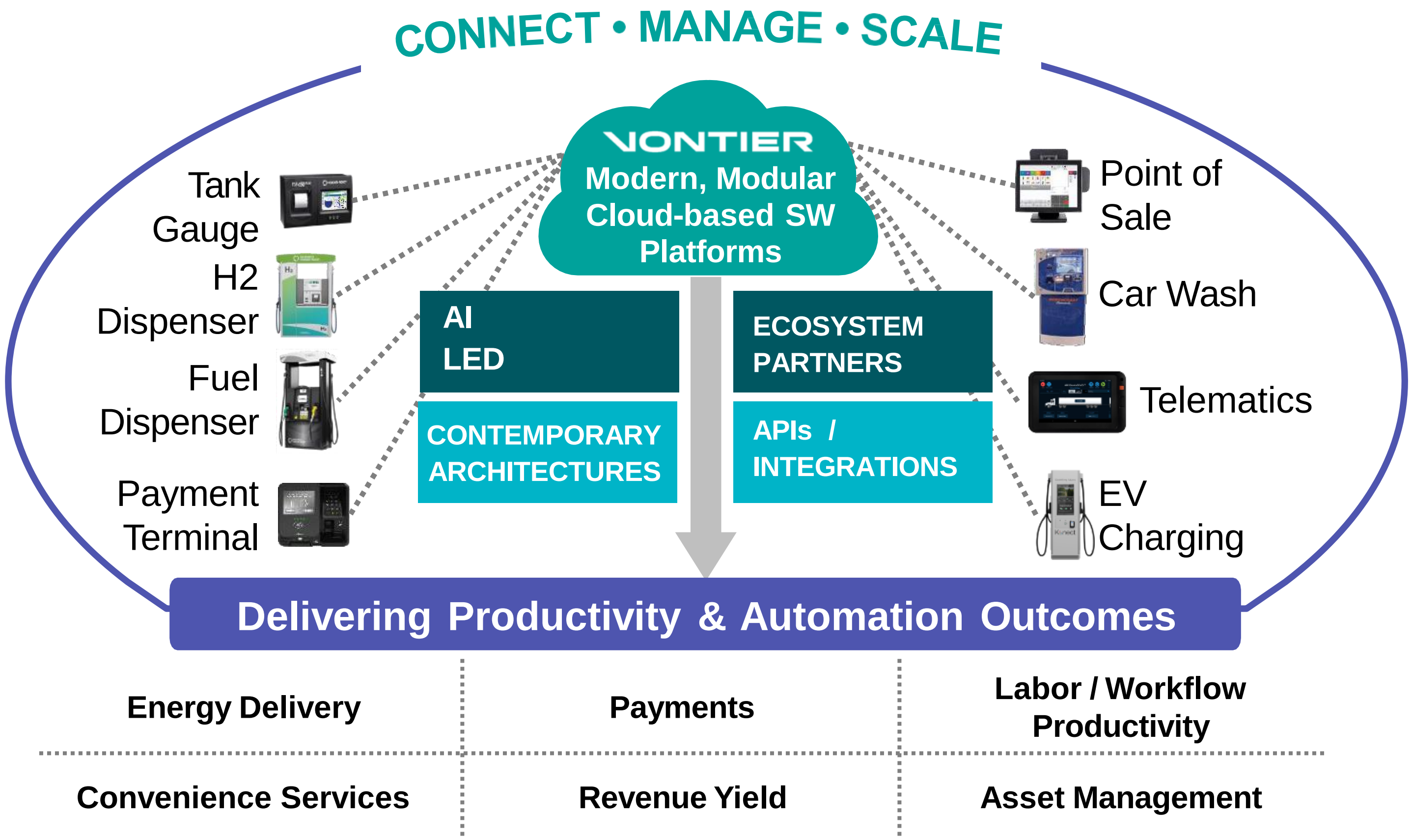
Deploying
Capital Allocation

- Returns driven
- Reinvesting for growth
- Returning cash to shareholders
- Strategic bolt-on M&A

Connected Mobility Strategy

Delivering integrated site-wide solutions that reduces complexity, lowers TCO*, drives new revenues

Mobility Ecosystem 4.0 Vision



What Does It Deliver to Customers

- **Easy to develop:** Modern open, microservices, cloud-first design
- **Easy to deploy**: Integrated, plug & play, tested, compliant solutions
- **Easy to maintain**: Scalable, extendable, serviceable, and supported

What Does It Displace

- Siloed, clunky and monolithic solutions
- Minimizes custom integrations
- Pivots from Hardware-led processes to Solution-led

*Total Cost of Ownership

Delivering Differentiated Value for Customers

Unifying hardware, connectivity, software and data to create seamless, efficient operations

Examples of Integrated Solutions

Forecourt & Energy Delivery

- Native integration by design for reliability and uptime

Unified Payments & Media Platform

- Unifying HW & SW creating a seamless experience & reliability

Asset Management & Compliance

- Real-time monitoring & remote resolution

How This Creates Value

50%+

Cost reduction in total cost of ownership

75%

Time reduction to achieve certification

2x

Accelerated **speed to market** for new applications

200%

Accelerated deployment across customer full estate

Example: Integrated Solutions for Convenience Retail

Solution for Shell creates a unified experience improving productivity & consumer experience

12,000+
Stations Installed

~1 Million+
Transaction (Daily)

From

- Disjointed forecourt and in-store
- Manual price changes
- Disjointed payment and loyalty

To

- Unified loyalty across channels
- Dynamic pricing
- Order-at-pump capability

> "This is the most comprehensive presentation of end-to-end integrated solutions. **The Company has made great strides in modernizing this industry** and look forward to continuing the partnership."
>
> \- Shell

Example: Integrated Solutions for Fleets

Vehicle identification solution (VIS) reduces fraud & enables revenue growth

12 Million
Vehicles (Potential)

12,000+
Stations Installed

From
- Tax fraud/evasion creating losses
- Huge volume of unauthorized fuel
- Minimal payment options

To
- Secure accurate fuel tax reporting
- Detection of suspicious activity
- Support alternative payment methods

"We are thrilled to have been entrusted as the partner for this important nation-wide initiative, bringing the **best technology partner to all residents requiring tax recognition"**

- Terratek

Creates Growth and Efficiency Opportunities for Vontier

Approach expands TAM, improves margins and increases customer stickiness

Expands TAM

From **$30B** to **$40B***

- Creating white space by moving from products to solutions and outcomes
- E.g., payment facilitation, revenue yield management, workflow automation

Increases Recurring Revenue

Recurring **Rev 40%****

- Adds software and services based recurring revenue streams
- Positive mix shift through software margin contributions

Improves OPEX & Profitability

11 → 1 site controller platforms**

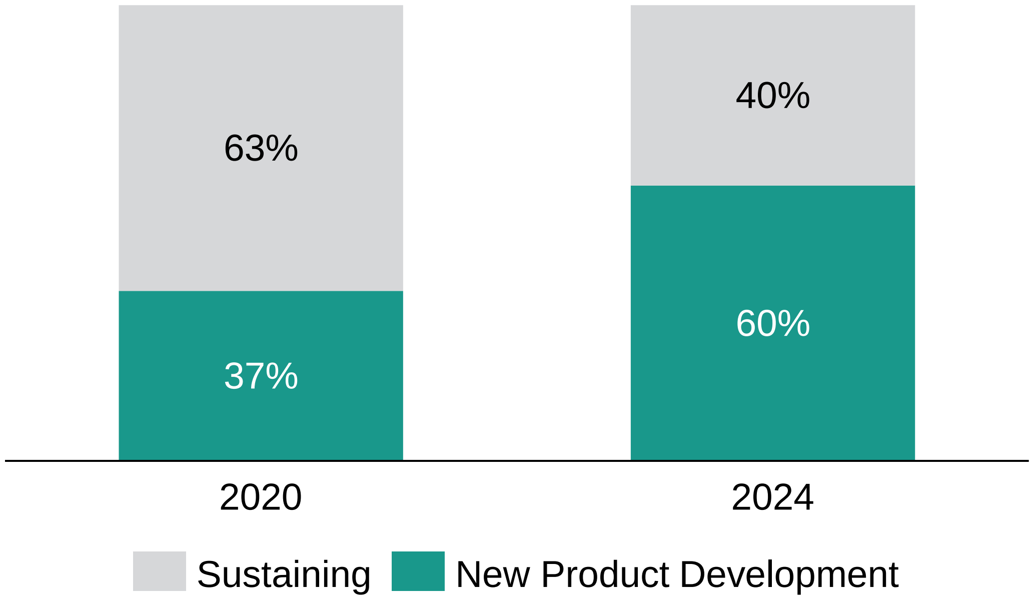
- Single connectivity architecture and edge leads to engineering efficiencies and scale
- Over-the-air activation & remote software upgrades reduces in-warranty expenses

*by 2030, ** by 2028

New Product Development Strong Growth Lever

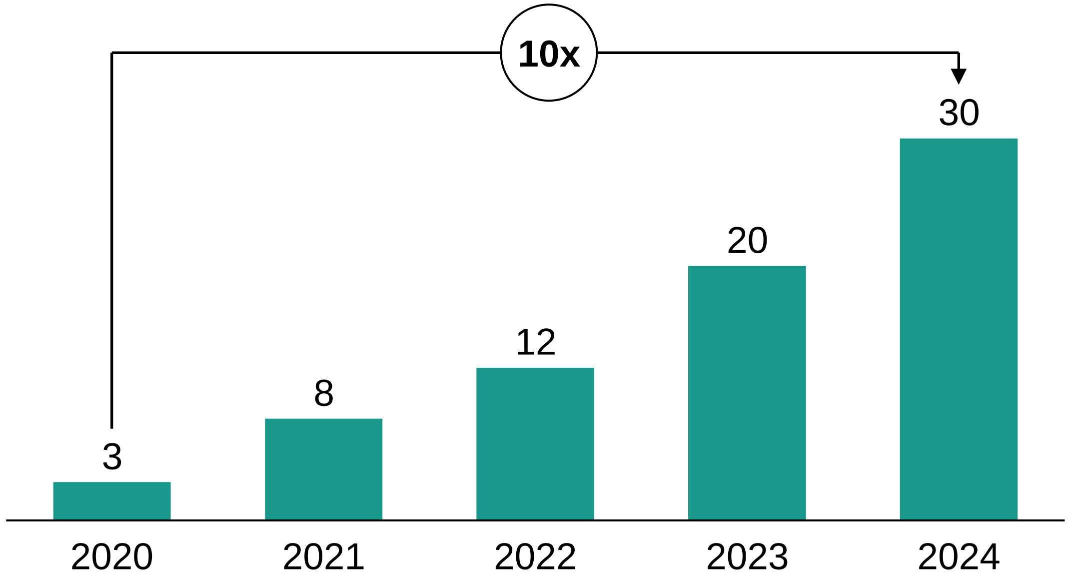
Increased focus on innovation and new products to market

Doubled New Product Development Spend



- Conscious shift to innovation and technology focus
- Platform simplification driving reduced sustaining spend

Accelerated New Product Launches



- Multiple hardware and software product launches
- Strong focus on enterprise productivity, asset management, and payment facilitation solutions

Driving Growth with Product Innovation Across Vontier

Launching exciting and differentiated solutions across the portfolio

Major New Products – Examples

	Car Wash	Retail Solutions	Environmental Solutions	Repair Solutions
				
Product	Next Gen Point of Sale (Patheon)	Integrated Forecourt Solution: Payment Terminal +Media + Order at Pump (FlexPay 6)	Next Gen Automatic Tank Gauge (TLS 450+)	Next Gen: 6S Toolbox
’25-’27 Sales	~$60M	~$100M	~$20M	~$20M

Optimizing Through Simplification & Rationalization Efforts

Creating capacity for investment and margin expansion in Fueling

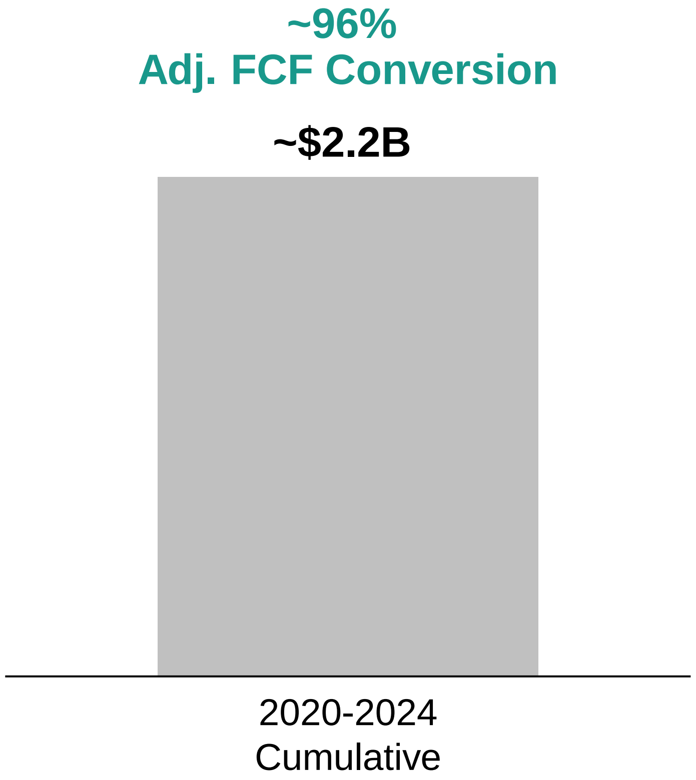
Optimizing	Targets	Timeline & Progress		
Pathway	**Planned Outcomes**	**2023**	**2025**	**2027**
Product Line Simplification	• 32 → 8 Platforms	16	10 **Platforms**	8
Footprint Rationalization	• 6 → 2 Hydraulics manufacturing locations	6	2 **Locations**	
Component Standardization	• 1% → >50% Standardized	1%	30% **Components Standardized**	>50%

*Value Analysis Value Engineering

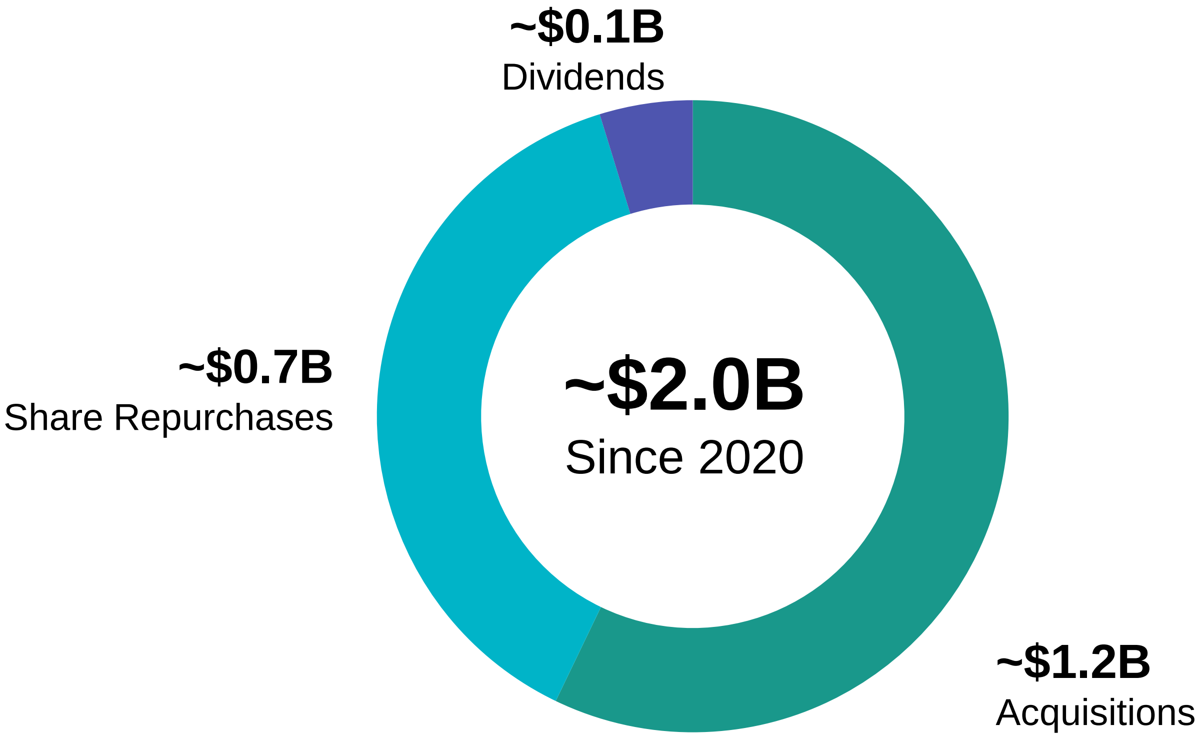
Disciplined Capital Deployment Maximizing Returns

Strong cash flow generation and ~$2B invested to maximize returns

Historical Cash Generation



Total Capital Deployed



Note: See "Non-GAAP" Financial Measures" on Slide 4

Well Positioned for Long Term Value Creation

Propelled by market leading positions, differentiated strategy & solutions and strong secular tailwinds

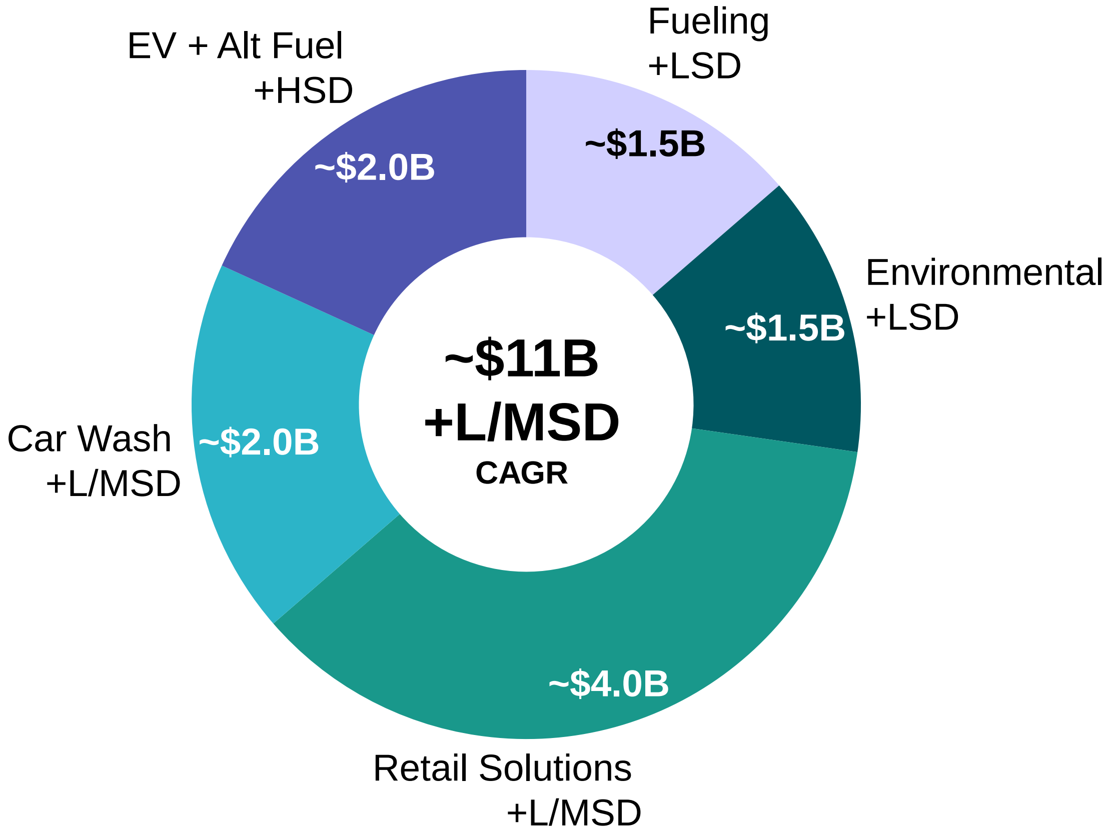
1. Attractive end-markets – large and expanding TAM
2. Unmatched portfolio depth and breadth with leadership positions across verticals
3. Differentiated strategy & solutions – connected, integrated, purpose-built, digitally enabled
4. Delivering high-value outcomes – reducing complexity, lowering costs, driving productivity and growth
5. Uniquely positioned to win – trusted partner

Today's Deep-Dive: Convenience Retail

We will focus our discussion today on the convenience retail end market

- Retail format providing **quick access** to essential services
- What defines convenience retail
  - Accessibility & proximity
  - Critical infrastructure
  - Multi-purpose
  - Extended hours
  - Higher frequency of visits

Total Addressable Market ($B) and 3-Yr Market CAGR



Modern Convenience Retail

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Convenience Retail

Most resilient and customer-centric format in modern commerce

33% of Brick & Mortar Retail Locations are Convenience Retail locations

2-3x Weekly Consumer Visits (vs. Other Format)

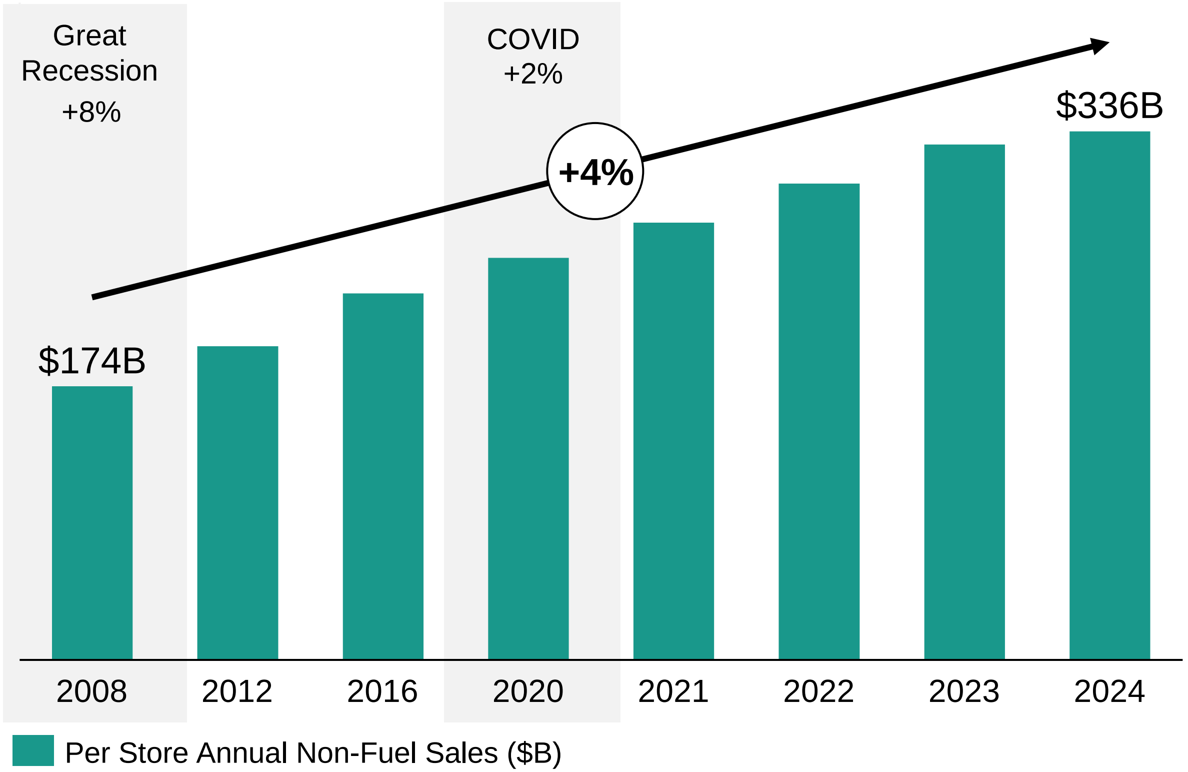
6% CAGR (’25 – ’30) Market** Growth

**Fuel sales + inside sales

Convenience Retail is Resilient

Growth coupled with increased investment signals confidence in long-term value creation for market

Non-Fuel Sales ($B) are Resilient and Growing



Source: National Association of Convenience Stores (NACS)

C-Retail Formats Are Getting Larger[1]

~13% — **Average Store Size**
~4,500 Square Feet

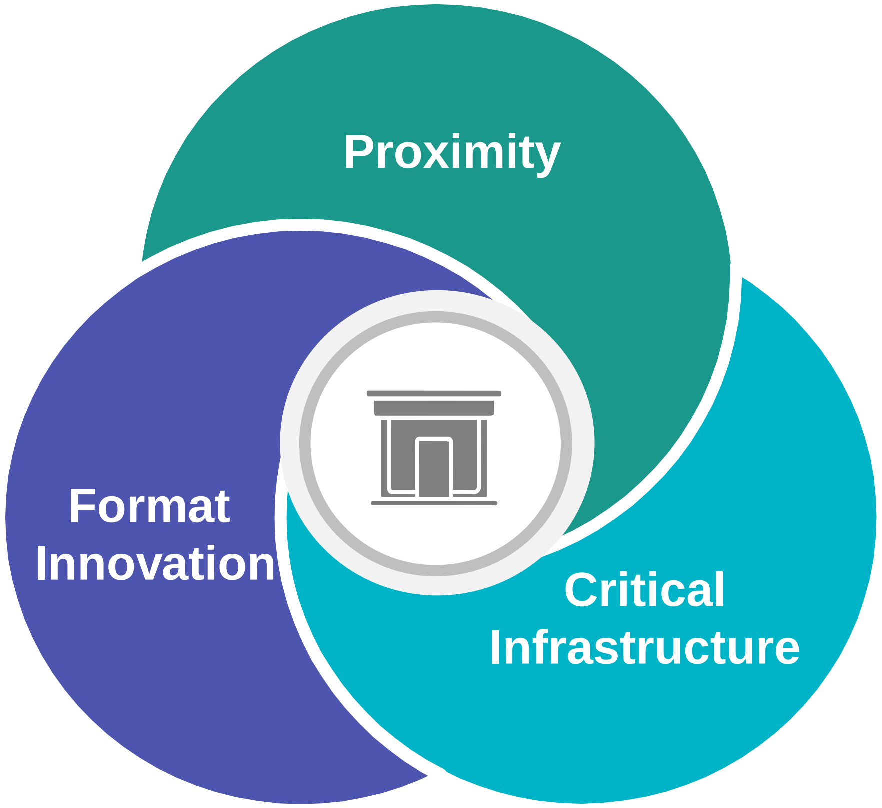
~30% — **Forecourt Expansion**
Average dispenser count growth

~40% — **Growth of Purchases**
In C-Store prepared food

[1]Inclusive of Hyper Market & Super Markets with Fuel

A Vibrant Format – Essential, Everywhere, Evolving

The format is strong due to its proximity, critical nature, and format innovation



Proximity – "Always Within Reach"

- **~150k convenience stores** in the US
- Nearly **50% of US population lives within 1 mile** of a store
- In rural areas, they are the **only retail outlet** for fuel, food, daily needs

Critical Infrastructure – "Essential, Everyday Access"

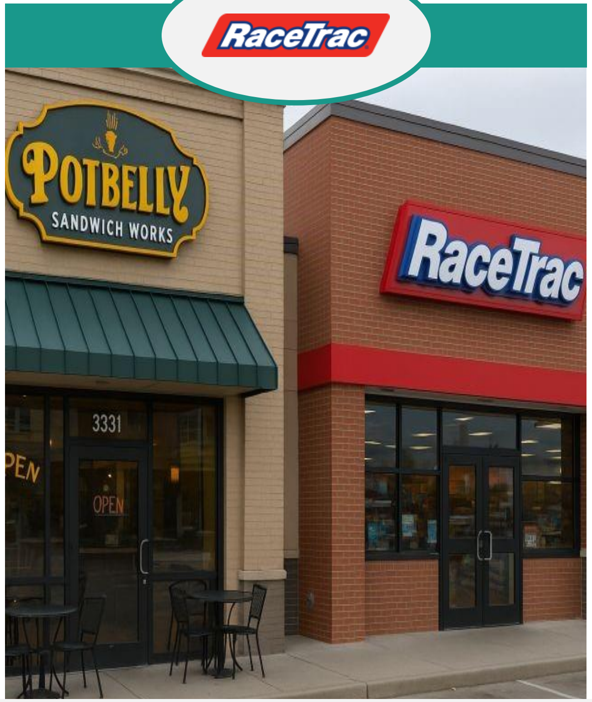
- **80% of US fuel demand** is supplied through convenience stores
- C-stores account for **33% of all US retail outlets** selling essentials
- During crises (COVID, hurricanes), they are designated **critical infra**

Format Innovation – "Evolving Beyond Fuel"

- **~60% of inside sales now comes from foodservice** and beverages
- Majors repositioning as **mobility hubs**: fuel + EV + food + car wash
- **Tech innovation**: frictionless checkout, loyalty apps, targeted offers

Made-to-Order Food Becoming a Key Growth Driver

Convenience retailers are investing in proprietary prepared food options



20% In-Store Sales

65% Margin from Made-to-Order Food

72% Viewed as a viable alternative to QSR

Today There Are Varying Formats and Offerings

These divergent formats require unique solutions as they evolve into mobility hubs

Small Format Urban Location

~2,000 sq.ft.

- Gas Dispensing
- Packaged Food

Multi-Purpose Rural Format

~5,000 sq.ft.

- Fresh & Made-to-order Food
- Car Wash
- Basic Media
- Curbside & Order Ahead

Large Format Mobility Hub

~15,000+ sq.ft.

- Multiple QSR Options
- Advanced Car Wash
- Advanced Media & AI
- Multi-Energy + Site Monitoring

C-Store: Fragmented and Undergoing Consolidation

Vontier is winning with the scaled players that are consolidating the market and investing

National Players are Consolidating the Market and Making Investments in New Sites – North America

National / Regional / Hyper-market ~150 organizations	**~$1.1B** TAM* *~MSD CAGR*	**~65%+** Market Share
Small Network Retailer ~68,000 organizations	**~$400M** TAM* *~LSD CAGR*	**~50%** Market Share

~$1.5B North America TAM for Fueling and Environmental: Global fueling and environmental TAM is ~$3B

Car Wash: Consolidation Unlocking Scale Advantages

Private equity and family office sponsors are scooping up fragmented independents

National / Regional Players are Consolidating the Market; Vontier Poised to 'Win with the Winners'

National / Regional* ~40 organizations	**~$400M** TAM** *~MSD CAGR*	**~30%** Market Share
Single Site / Township* ~1,000 organizations	**~$300M** TAM** *~LSD CAGR*	**~20%** Market Share

*Regional / National = Private Equity, Family Office, Public
*Township / Single Site = Small chains or sole proprietors
**$700M TAM represents POS market – pivotal submarket of ~$2B overall carwash TAM

Consolidation and Growth Will Continue

Scaled players invest more as they consolidate, build new, and refresh existing sites

8,000

C-Store Sites Acquired

National and Regional companies acquired sites 2021-2025 YTD

800+

Annual C-Store Adds

New to industry C-Store sites expected annually

~3.6M

Sq. Footage Growth

Approximate square. footage added from C-store new builds annually

500+

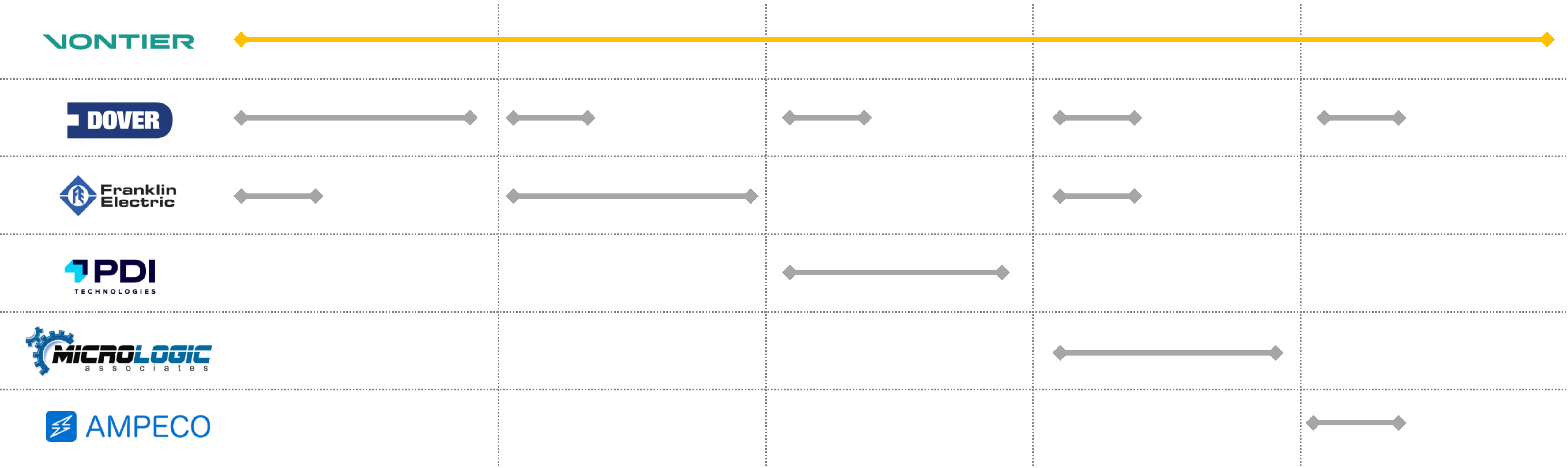
Tunnel Carwash Adds

Annual new to industry tunnel carwash builds expected

An Unmatched Breadth and Depth Creates Advantage

A strong presence in all markets allows us to lead our customers in a unified fashion

	Fueling	Environmental	Retail Solutions	Car Wash	EV + Alt Fuel
TAM	**~$1.5B**	**~$1.5B**	**~$4B**	**~$2B**	**~$2B**



The Real Unlock: Integrated Solutions Across Our Businesses

Logical, connected solutions that turn the sites into a unified ecosystem

Fueling Systems

Offering Modules

- Dispensers
- Forecourt Controller
- Payment Terminal

Environmental Solutions

Offering Modules

- Automatic Tank Guage
- Submersible Turbine Pump
- Vapor Recovery
- Fuel Quality

Retail Solutions

Offering Modules

- Point of Sale
- Payment Terminal
- Electronic Payment Service
- Media

Car Wash

Offering Modules

- Point of Sale
- Consumer engagement
- Payment workflows
- Smart Controllers

EV Charging

Offering Modules

- Charge point management system
- Energy management
- Charging HW
- Dynamic pricing

CONNECT — MANAGE — SCALE

What We Will Discuss Next

Differentiated solutions across our core businesses – then connecting it all through our strategy

1. **Integrated Forecourt & Retail Solutions –** above-ground, below-ground, inside retail (Mark Williams)
2. **Enabling Energy Expansion –** managing EV + Alt Fuels alongside fuels and retail (Andy Bennett)
3. **Car Wash Solutions –** leveraging growth, subscriptions, and integration with retail (Devon Watson)
4. **Our Connected Mobility Strategy –** how integration creates differentiated customer value (Austin Lieb)
5. **Industry Panel & Financial Update** (Anshooman Aga)

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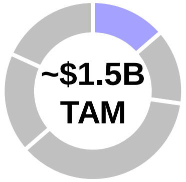
Integrated Forecourt & Retail Solutions

Mark Williams
President, Forecourt Solutions

Integrated Forecourt & Retail Solutions

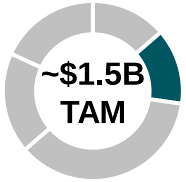
Vontier has leading positions across the forecourt and in-store point of sale



Fueling
Above Ground

#1
Fueling Dispensers

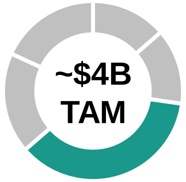
~260K Sites



Environmental
Below Ground

#1
Automatic Tank Guage

~220K Sites



Retail Solutions
Consumer Engagement

#2
Point-of-Sale

~65K Sites

Attractive Market Driven by Proximity, Format & Innovation

Resiliency factors along with increased consumer engagement key to ongoing growth

Format is Resilient Due to Multiple Factors

Footprint and Proximity

Format Innovation

Consumer Demand for Convenience

Growing Sales and Profits

Consumer Engagement is Key to Growth

47%

Of Consumers Noticed Digital Media

1/3 made a purchase

160M

Transaction per Day

In-Store transaction up 1.6% YOY

$8.05

Average Basket Size

2% CAGR 21-24

72%

Of Consumers now view C-Store as a real alternative to QSR

Market is Fragmented with Few Scaled Players

We have strong site market share across all five convenience retail segments

Go-To-Market

Direct

Channel

Customer Segments	Sample Logo's	# of Firms	# of Sites
National Accounts		~18	~34,000
*Major Oil Affiliates**	Shell, Chevron	*~9*	*~55,000 (influence)*
Regional Accounts	Parker's kitchen, GOOD2GO	~123	~13,000
Hyper Market & Travel Plaza	COSTCO WHOLESALE, Pilot	~15	~7,500
Small & Single Site Operators (1-50 Sites)	TRIUMPH ENERGY	~67,700	~79,500

*Major oil affiliates are part of all other segments store counts

Nationals & Regionals Lead Consolidation & New Build Growth

Consolidation is creating sophisticated, well-capitalized firms with scale & investment capacity

~8,000 US Sites Were Acquired Between 2021-2025 (to date)

Sample companies (100% acquired)

National & Regional Companies Lead both Consolidation & New Builds Growth

Vontier well positioned with those getting "bigger"
(~65%+ Site market share with those pictured)

~13K Sites *~7K Sites* *~1,000 Sites*

~1,000 Sites *~700 Sites* *~870 Sites*

~580 Sites *~640 Sites* *~650 Sites*

Customer Investment Drivers Across C-Retail

Strong Fuel & In-Store margins are funding continued investment

	New to Industry & Raze & Rebuild	Natural Refresh Cycles & Remodels	Regulation Cycles & Compliance	Innovation & Technology Upgrades
Sites Impacted	**800+** **Annual** New Builds or Raze & Rebuild	**~4-6%** **Of Total Sites** Per Year	**Varies** **Timing Dependent** on Regulation Rollout	**Ongoing** Most sites plan on **rolling innovation investment**
Estimated Investment	**~\$800K - ~\$1.2M** **Forecourt Investment** Per Site	**~\$100K - \$800K** Investment **Per Site**	**~\$200K - \$600K** Per Site dependent on **type of Regulation**	**~\$50K - \$500K** Per Site earmarked for **ongoing innovation**

Fueling: From Isolated Hardware to a Connected Ecosystem

Seamless forecourt experience that reduces costs, ensures compliance, & drives in-store conversion

Dispenser

Outdoor Payment Terminal

Remote Management

Media

Forecourt Controller

Fueling

~$1.5B	+LSD
TAM	Growth

Value Proposition

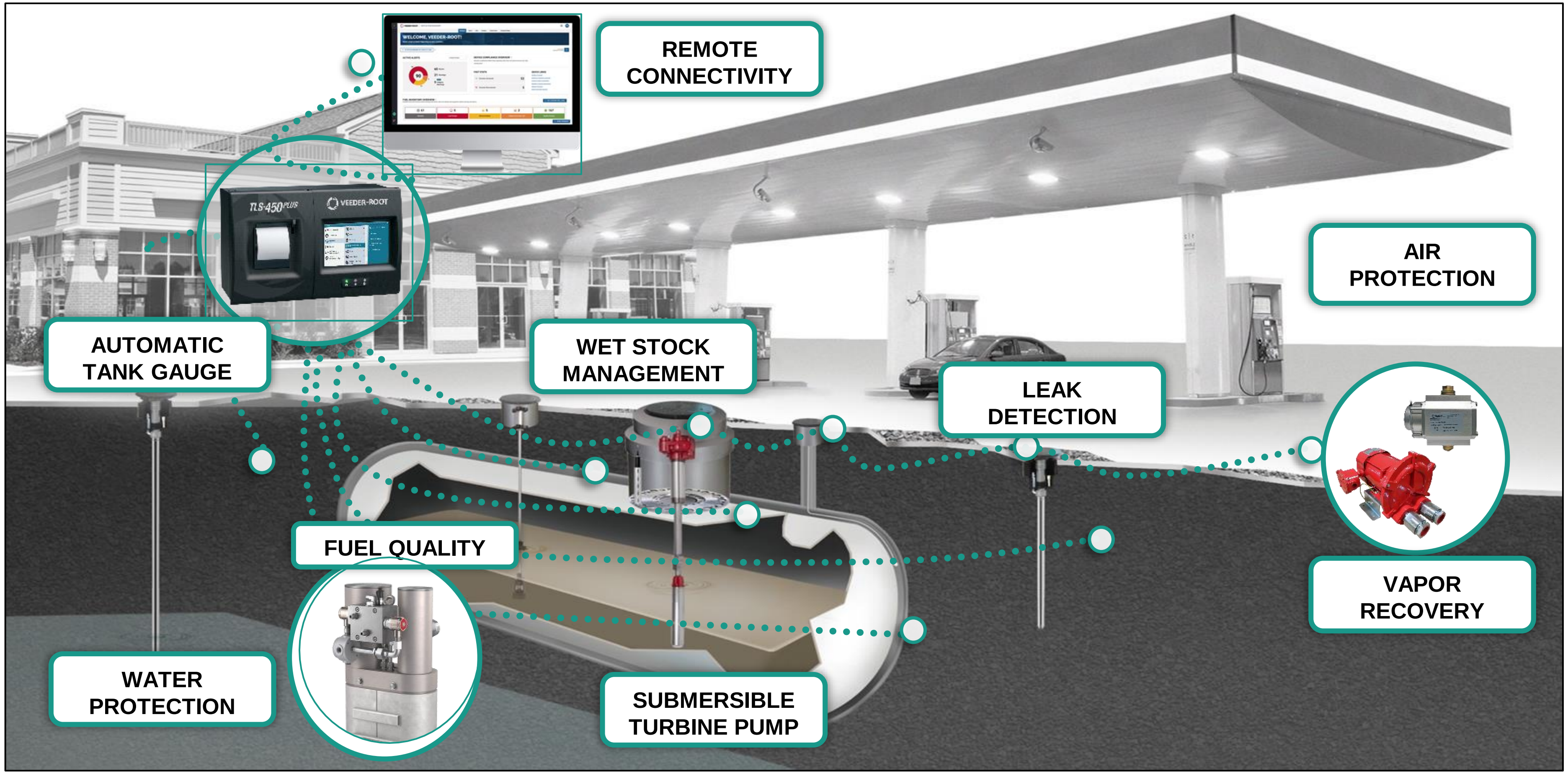
Empowers operators to maximize efficiency & deliver a seamless fueling experience while driving in-store conversion

Key Issues

- Maintenance Costs
- Payment Compliance
- Theft Prevention
- Unified Customer & Brand Experience
- Forecourt Conversion

Environmental Solutions that Lower Risk and Improve Uptime

A unified system providing real-time visibility, remote resolution, and risk mitigation at lower cost



Environmental

~$1.5B	LSD
TAM	Growth

Value Proposition

Guaranteeing compliance & inventory management with real-time monitoring to ensure uptime, reduce risk & lower cost

Key Issues

- Compliance + Risk Mitigation
- Inventory Visibility
- Alarm Management
- Remote Resolution
- Uptime

Retail Solutions: Seamless, Smart, & Connected Experiences

Integrated solution boosts revenue, cuts costs, & drives innovation through unified retail experiences

Consumer Engagement Touch Points & Workflows

Retail Solutions

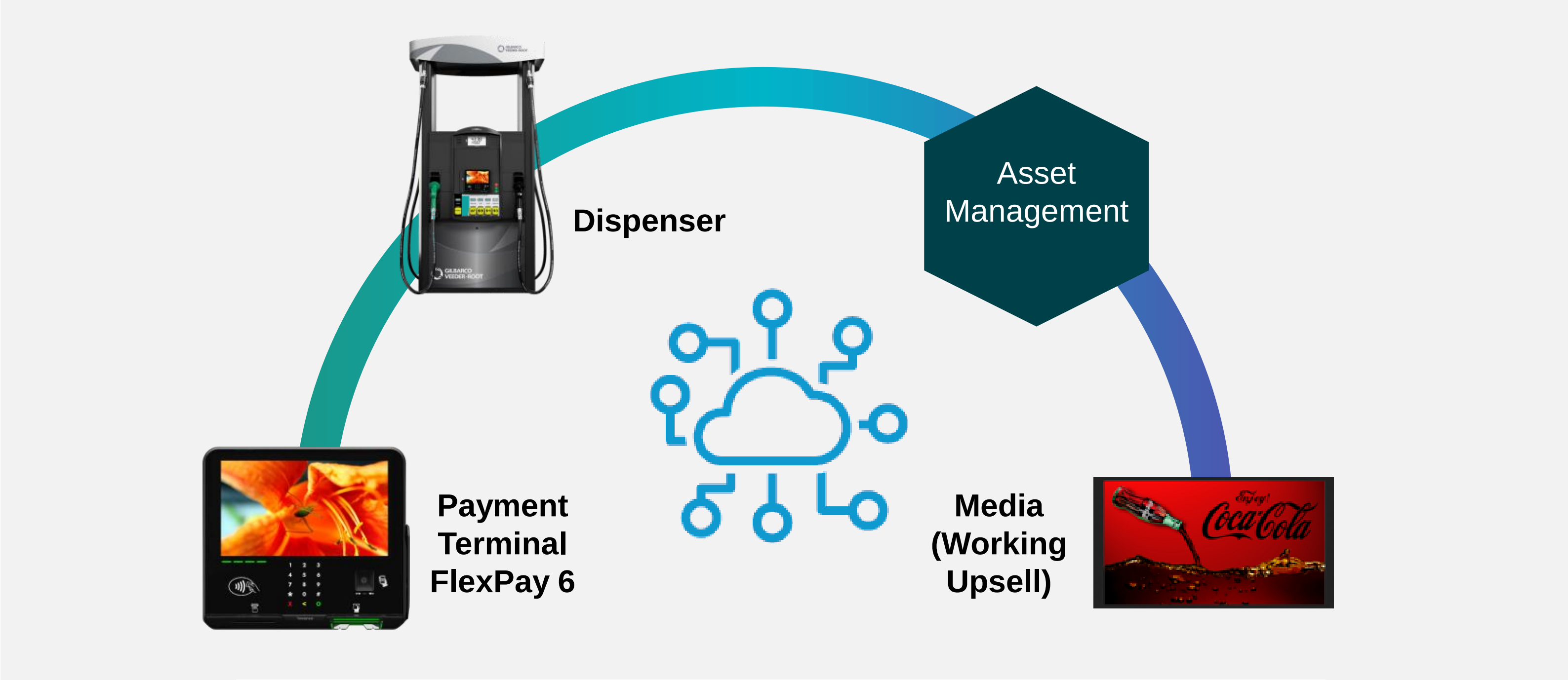
~$4.0B	L/MSD
TAM	Growth

Value Proposition
Integrating consumer touchpoints to accelerate innovation and deliver seamless experience improving productivity, transactions & engagement

Key Issues
- Disjointed consumer experiences
- Payment Compliance
- Unified Customer & Brand Experience
- Loyalty acceleration

Customer Example: Reducing Operational Costs

Example of regional customer that is investing in integrated hardware and technology



Town Pump Challenges

Payment Compliance | Service Support over Large Geography | Maintenance Cost

OUTCOMES

- **Estimated elimination of up to 75% of truck rolls:**
  - Improved early issue detection to minimize downtime
  - Prioritized network service based on severity
  - Remote configuration for network-wide adjustments without site visits

Key Messages

Integrated Forecourt & Retail Solutions

1. Vontier stands as a leader in forecourt and retail solutions that address fueling, environmental, and customer engagement needs
2. Vontier’s leading market share with the scaled players ensures we will grow as they lead the industry in consolidation and investment
3. Market investment is also supported by new builds, regular refresh cycles, regulatory compliance, and ongoing innovation and technology upgrades
4. Integrated solutions help retailers boost revenue, cut costs, and accelerate innovation, while expanding Vontier’s available market

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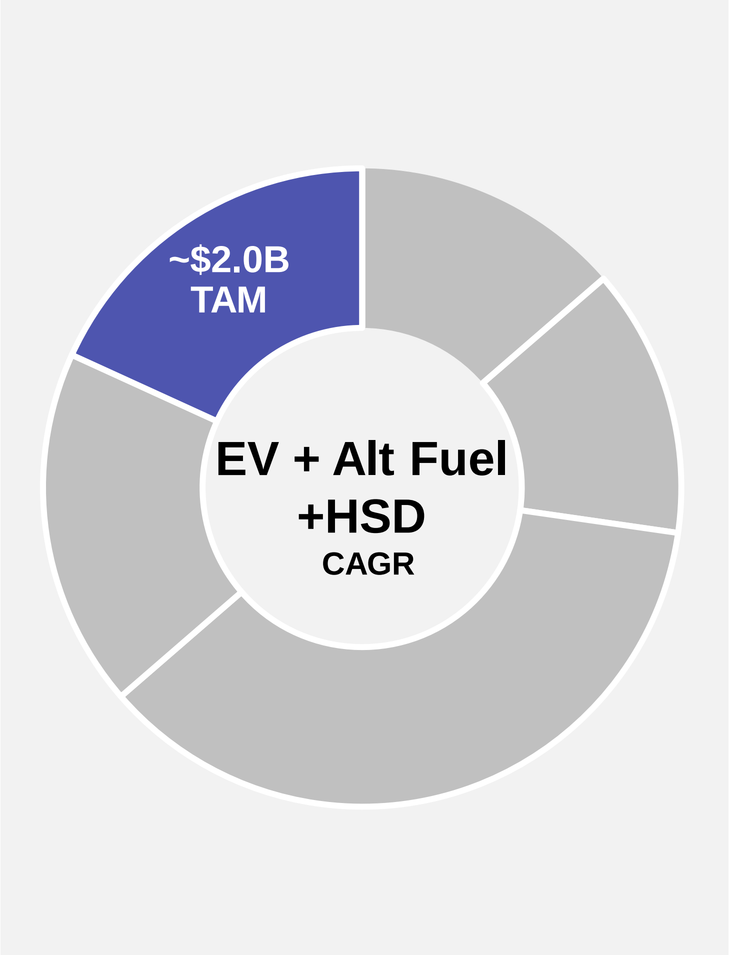
Enabling Energy Expansion

Andy Bennett
Group President, Convenience Retail

Energy Expansion

Expanding beyond traditional fuels



Traditional Fuels

+LSD Market Growth

Alternative Fuels (CNG / RNG / Biofuels)

+HSD Market Growth

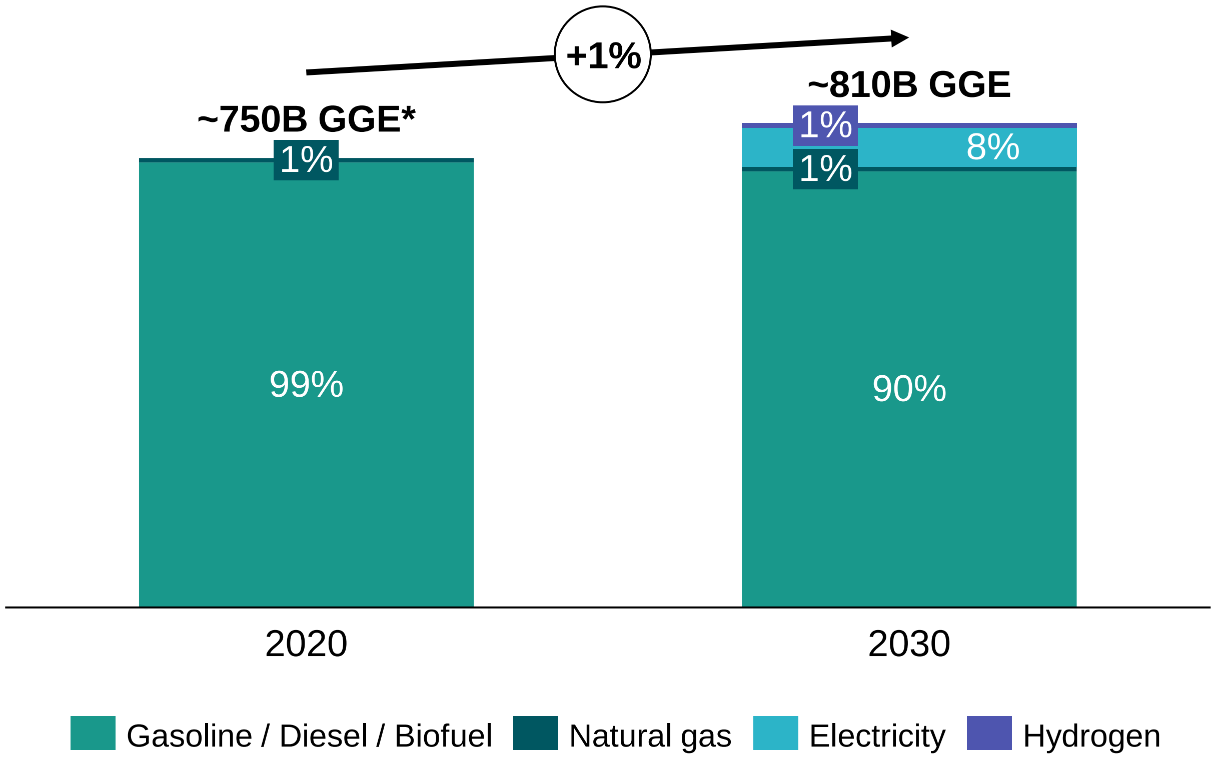
EV Charging

+DD Market Growth

Energy Demand and Fuel-Mix Increasing

Mix of fuels to co-exist with petroleum derived fuels remaining dominant

Road Transportation Energy Demand and Fuel Mix Increasing



*Gasoline gallon equivalent; source: IEA

Drivers

- Vehicle parc growth
- Greenhouse gas and emissions related policies and regulations
- Government incentives
- Total cost of ownership improvements by fuel type and vehicle mission

Global Convenience Retailers Expanding Offerings

Expanding beyond traditional fueling to alternate fuels and EV charging

| Bio-Diesel Fueling

| EV Charging

| CNG Fueling

Convenience Retailers Have Innate Advantages

Uniquely advantaged over other retail formats to host multi-energy infrastructure

BEST LOCATIONS

Proximity to consumers

+90% of US population lives within 10 minutes of a store

ONSITE AMENITIES

Best consumer experience

Onsite QSR, store, car wash, fueling, EV charging

ADVANTAGED ECONOMICS

Multiple revenue streams fund new growth

+DD margin on non-fuel sales

Gilbarco + ANGI – Leading Biofuel & CNG Solutions

Helping customers expand into alternative fuels

Bio-diesel & Flex Fueling Solutions

GILBARCO VEEDER-ROOT
Powered by Vontier

Ultra-high flow
bio-diesel / diesel
and **DEF* dispenser**

*Diesel exhaust fluid

Flex Fuel Dispensers

Integrated CNG Fueling Solution

ANGI
Powered by Vontier

CNG / RNG Dispenser

Controller

Compressor

Gilbarco – Fully Integrated Turnkey EV Charging

Helping customers manage complexity by delivering a unified experience

"Our customers' response to the Konect solution has been overwhelmingly positive. Even our Tesla customers are excited to finally have a reliable and convenient alternative to the Super Charger network. Konect is truly transforming the charging experience."

Large National C-Store

Turnkey Solution

- EV charger with payments integrated into existing fuel retail system
- EV charging software
- Field service

Differentiators

- Best-of-breed payments and EV charging software
- Strong commercial relationships & channels

Driivz – Most Trusted EV Charging Software

Helping customers monetize and operate EV charging infrastructure

driivz
Powered by Vontier

Enterprise grade EV charging platform helping customers to…

- Establish unique business models
  - Pricing, billing, rating, payments
  - Enhance driver experience
- Optimize charger uptime
- Balance energy loads across sites
  - Maximize available power
  - Minimize grid infrastructure cost

#2
EV charging software

~20%
Of all EV drivers on Driivz platform*

~1TWh
Total energy delivered

*ex-China

Driivz – On a Strong Growth Trajectory

Winning key accounts and growing significantly above market rate

Reasons Driivz Winning

Scalability

Highly-stable platform
99.9% availability vs. ~75% industry average

Flexibility & Interoperability

Modular platform integrates into existing systems. Interoperable with +2k EV chargers

Leading Feature-Set

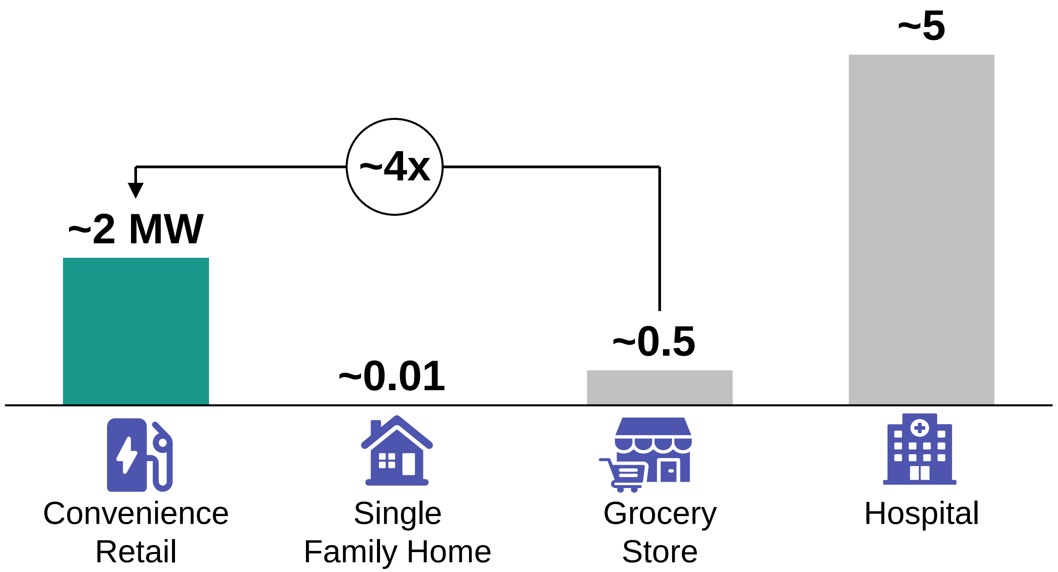
Integrated energy management, charger self-healing, billing, roaming

Customer	From	To	2030 # Plugs
EVgo	Home Grown →	Now Powered by driivz	~12k
Shell	Home Grown →		~7k
Circle K	Competitor 1 →		~8k
mer (Pure energy from Statkraft)	Competitor 1 →		~45k
greenspot (Smart Mobility)	Competitor 2 →		~9k
element	Nothing →		~7k

Driivz – Premier Energy Management Solution

Addressing the top-most concern of EV charging operators

EV Charging Sites Have ~4x Peak Load of Grocery Stores



- Only player with a **deeply integrated Energy Management System** and on-site controller to solve any customer need
- **Proprietary real-time data & advanced AI algorithms** deliver best-in-class results via:
  - Load management
  - Demand forecasting
  - Renewables & battery storage orchestration
  - Demand response & flexibility market participation

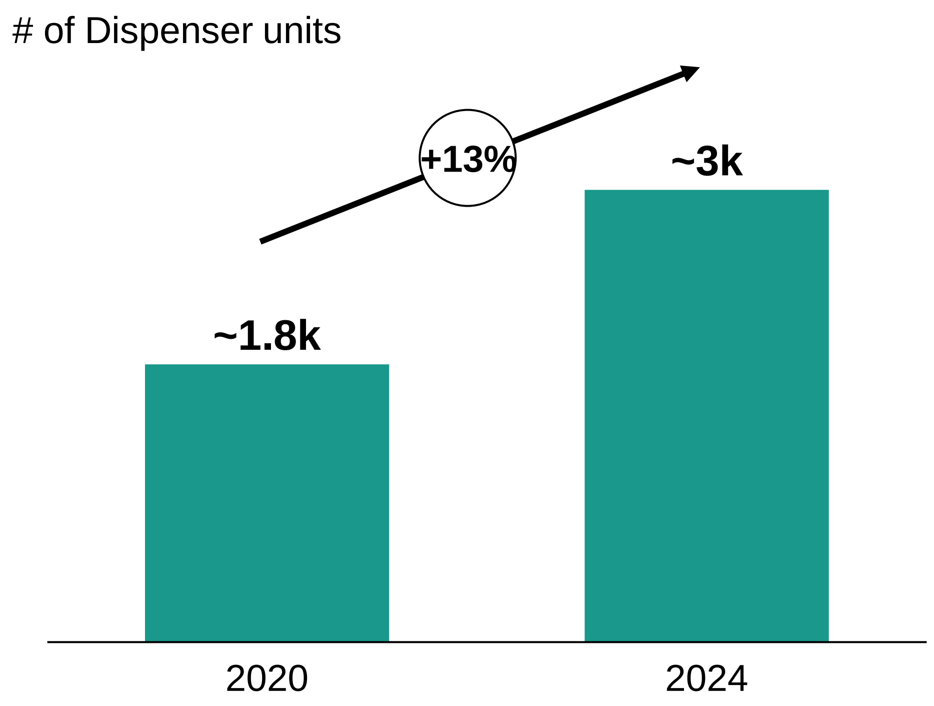
~6x **Increase** in site EV charging capacity without infrastructure upgrade

~$50k Per site energy cost **reduction**

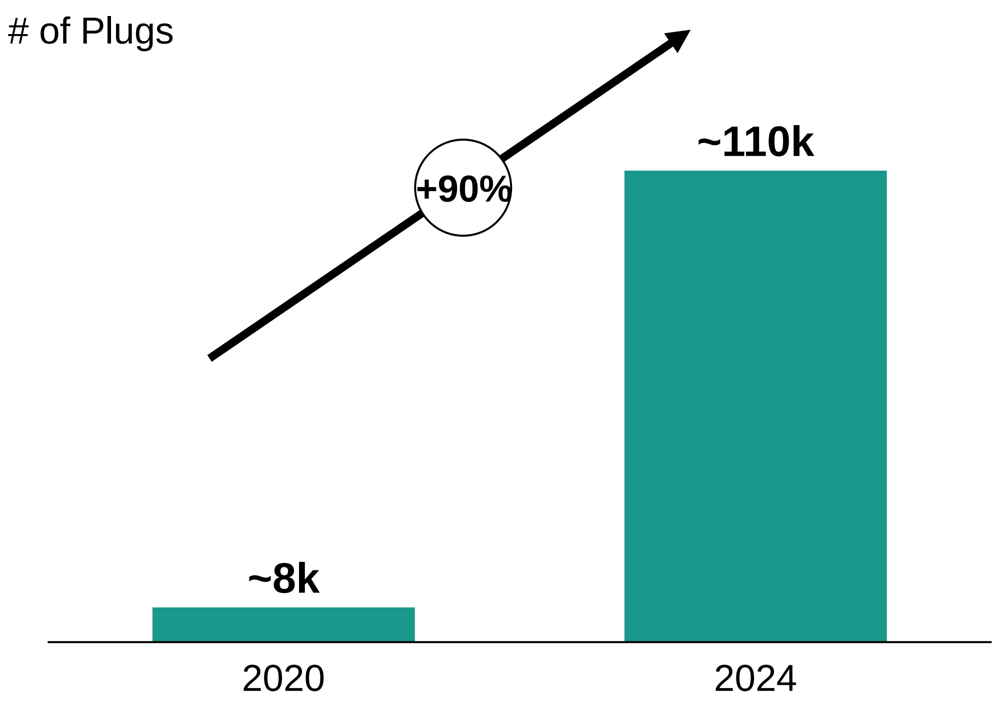
Differentiated Solutions Growing Rapidly

Unique offerings delivering customer outcomes better than alternatives

Diesel (DEF*) Unit Sales Growing LDD



EV Plugs Under Management Growing HDD



*Diesel Exhaust Fluid and Biofuels

Key Messages

Minimizing complexity for convenience retailers on their energy expansion journey

1 | Energy demand significant and growing

2 | Convenience retailers increasingly offering alternate fuels and EV charging; are uniquely advantaged as multi-energy infrastructure hosts

3 | Vontier has a strong solutions portfolio to aid this energy expansion

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Scaling Growth in Car Wash

Devon Watson
President, Car Wash Solutions

Car Wash Solutions

Integral part of convenience retail ecosystem

DRB
Powered by Vontier

Tunnel / Conveyor Car Wash

~12,000 Industry installed Base

+MSD Site Growth

#1 (~45% Site Share**)**

$1.8B TAM

In-Bay Automatic Car Wash

~29,000 Industry installed Base

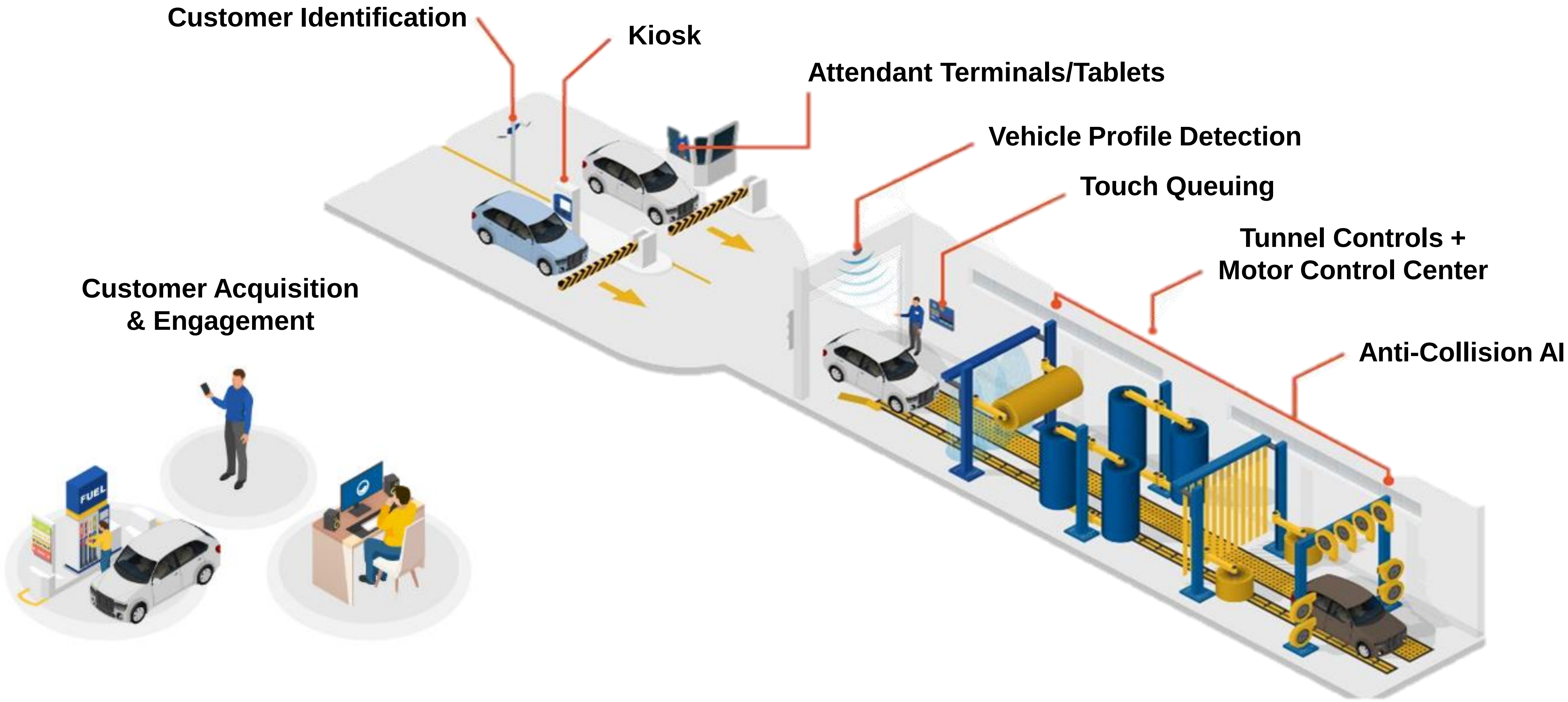
+LSD Site Growth

#1 (~55% Site Share**)**

~$0.2B TAM

Modern Car Wash: Complex, Interconnected Set of Workflows

Consistent, high-quality wash experience requires end-to-end workflow management



Tunnel Car Wash: Attractive Growth Market

Strong industry fundamentals with multiple long-term secular tailwinds

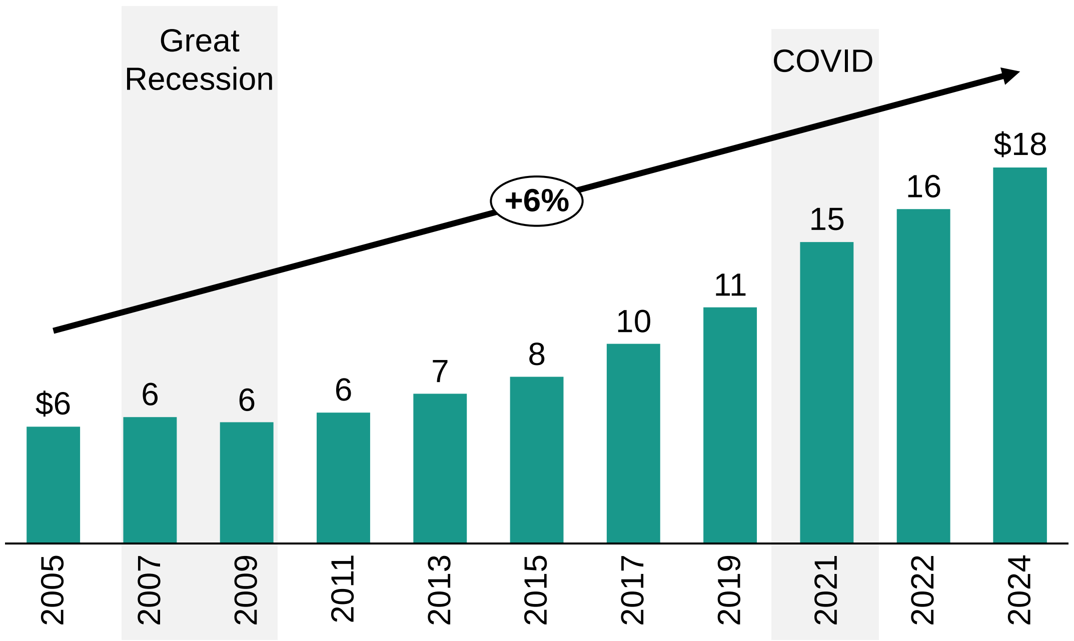
Long-term Secular Network Growth	Long-term Same Store Sales Growth	Profitable Operator Economics	Durable End-Market
15-20 Year **Build-out** runway	**<15%** **Membership** penetration	**45-65%** **Operator EBITDA** Margins	**Resilient** Through business cycles
+400-600 Annual **Greenfield Sites**	**+10%** Increase from **DIY* to DIFM**** car washing over last 10 years	**10-15x** **More Profitable** than other retail formats (grocery, drug store)	**<6%** Average membership **Churn**

*DIY = Do It Yourself **DIFM = Do It For Me

Resilient Sector, Significant Runway for Memberships

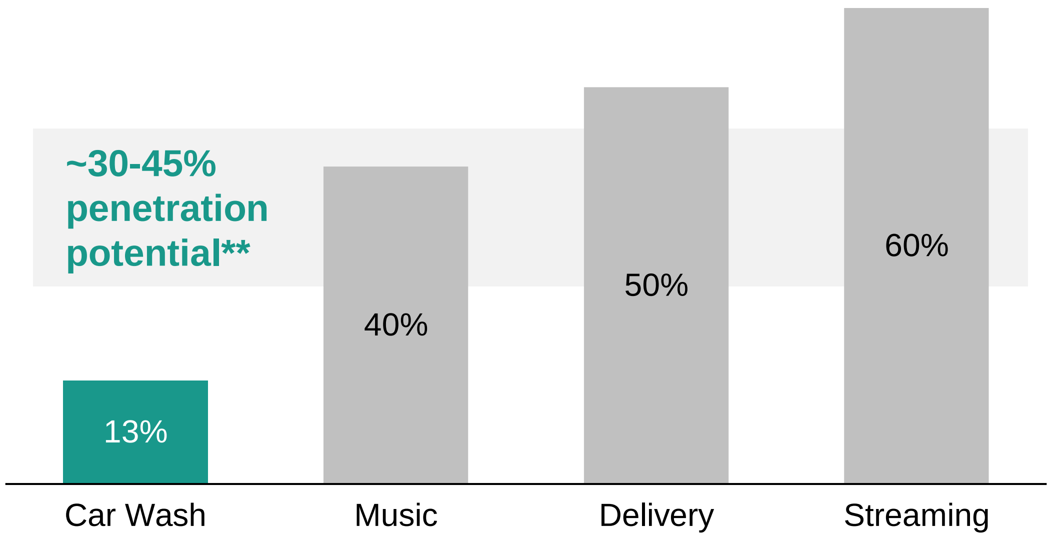
Car wash spend historically resilient with significant growth opportunity in memberships

Car Wash Consumer Spending Demonstrates Resilience ($B)*



*Federal Reserve Bank of St. Louis; **Car Wash Advisory "2024 Car Wash M&A report"

Car Wash Poised for Substantial Growth in Subscriptions



- Retail → Membership = 6x revenue lift

**Car Wash Advisory "2024 Car Wash M&A report"

Car Wash: Consolidation Unlocking Scale Advantages

Private equity and family office sponsors are scooping up fragmented independents

National / Regional Players are Consolidating the Market; Vontier Poised to 'Win with the Winners'

National / Regional* ~40 organizations	**~$400M** TAM** *~MSD CAGR*	**~30%** Market Share
Single Site / Township* ~1,000 organizations	**~$300M** TAM** *~LSD CAGR*	**~20%** Market Share

*Regional / National = Private Equity, Family Office, Public
*Township / Single Site = Small chains or sole proprietors
**$700M TAM represents POS market – pivotal submarket of ~$2B overall carwash TAM

Vontier Offers Industry Leading Solutions

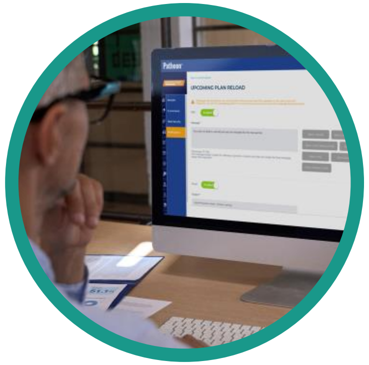
Integrated platform unlocks network scale for professional operators

Elements of Stack	Our Products	Outcomes Delivered
Enterprise Point of Sale (POS)	patheon+	• Large-Network Scalability • Enterprise-grade Software
+ Consumer Engagement	catalyst + beacon	• Subscription Management • Marketing Automation • Mobile Application
+ Asset Management & Monitoring	sgt sudz	• Smart Tunnel Controls • Cost Awareness • Operating Efficiency

Patheon is Simplifying Operator Workflows

Modular, cloud native software stack delivers measurable customer outcomes

patheon+



POS & Wash Management

Marketing Automation

Loyalty & eCommerce

*"Training takes little to no time. The loading touchscreen is a **game changer** with its functionality."*

COBRA EXPRESS CAR WASH

*"The backend tool makes codes, campaigns, discounts, house accounts, kiosk configuration and more **infinitely easier**."*

RAINFOREST CAR WASH

Customer Benefits

+10%
Membership Growth*

-5%
Churn Reduction*

+14%
Total Revenue Growth*

*Based on 18 actual customers and 156 corresponding sites

End-to-End Consumer Engagement & Site Management

Flexible and integrated solution set delivers higher revenues and lower operating costs

From
- Disjointed consumer experience
- Disparate point-solutions
- Complex on-premise software
- Manual device management

To
- Built-in digital marketing and CRM
- Omnichannel sales and payments
- Modern cloud-based architecture
- Real-time device management

"The solutions give you the ability to pivot on the spot, make great decisions and take better action on what you see in your business."

- Mint SmartWash

We Unlock Digital Orchestration of The Modern Car Wash

Deeply embedded in customer workflows that impact operations and customer experience

“Brains” of the Car Wash

System	Pay Station	Tunnel Controller	Motor Control Center	Devices
				Motors, Pumps, Blowers 
Market Position	#1	#1	#1	

Customer Outcomes

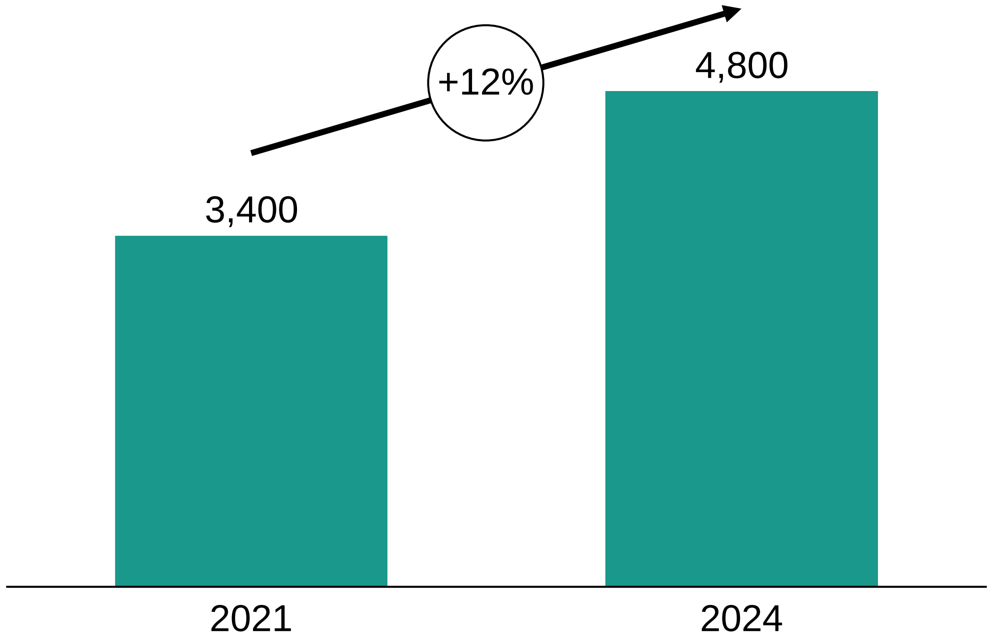
- Connects front-office to back-operations
- Improves uptime, throughput
- Reduces operating expenses

Leading Position with Acceleration Underway

We are the market leader and continue to build on our differentiated position

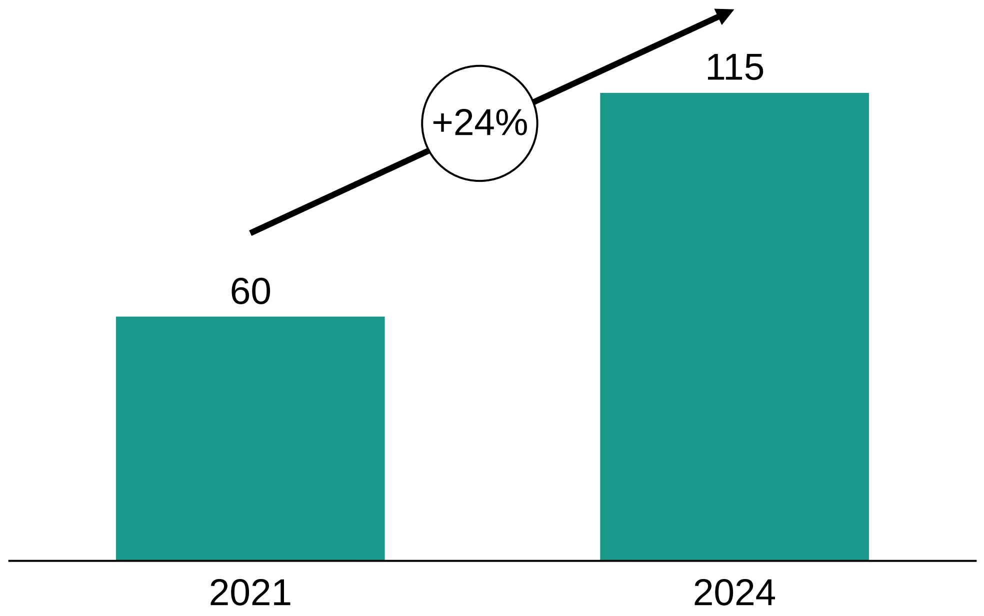
Double Digit Installed Base Growth

DRB Tunnel Sites (units)



ARR* Growing 2X Installed Base Growth

DRB Annual Recurring Revenue ($M)



*ARR = Annual Recurring Revenue

Key Messages

Enabling Scalable Growth in Car Wash

1 | Car wash end-market is fundamentally attractive; significant secular growth ahead

2 | Market consolidation and professionalization in-progress; compelling need for enterprise-grade solutions

3 | Vontier is leading the industry with integrated, enterprise digital solutions for car wash

Connected Mobility Strategy – Integrated Solutions

Austin Lieb
Chief Product Officer, Convenience Retail

Bringing It All Together…

As sites evolve into Mobility Hubs, customers are facing a number of pain points

Market Evolution

- Convenience retail is evolving into multi-service mobility hubs
- Customers are facing rising complexity and costs
- **Integration matters more than ever** – to simplify operations, enhance uptime, and drive profitability
- Vontier's scale and breadth and differentiated Connected Mobility Strategy uniquely positions us to lead

Customer Pain Points

Solution Patchwork

- Technology silos
- High integration burden
- Redundant solutions *(asset management*)

Data Cleanliness & Silos

- Limited visibility and control across the estate
- Impact's ability to leverage data to reduce costs

Security & Compliance Gaps

- Estate complexity and lack of compliance understanding
- Changes require end to end compliance recertification

Broken Consumer Journey

- Inconsistent customer experience due to lack of integration across solutions *(media, point-of-sale, loyalty)*

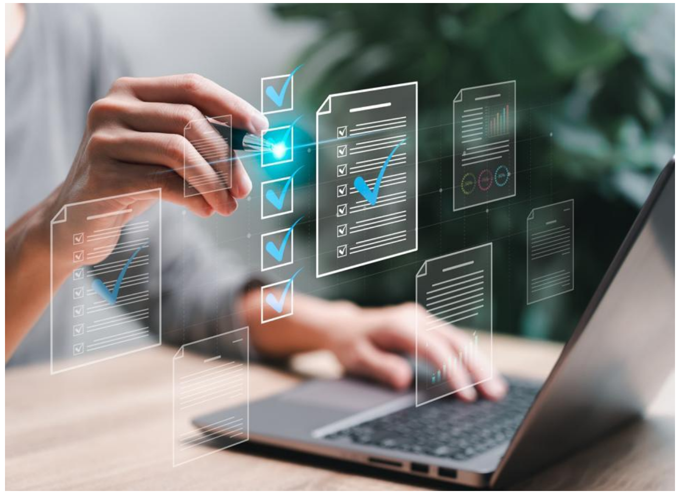
Why Now: Convergence of Forces & Transformation Readiness

Technology, market pressures, and rising risks make integrated transformation essential today

Multiple Forces Colliding at Once

Individual forces have existed for a while, but the convergence is creating operational and strategic pressure

Technology Has Matured to Enable Transformation



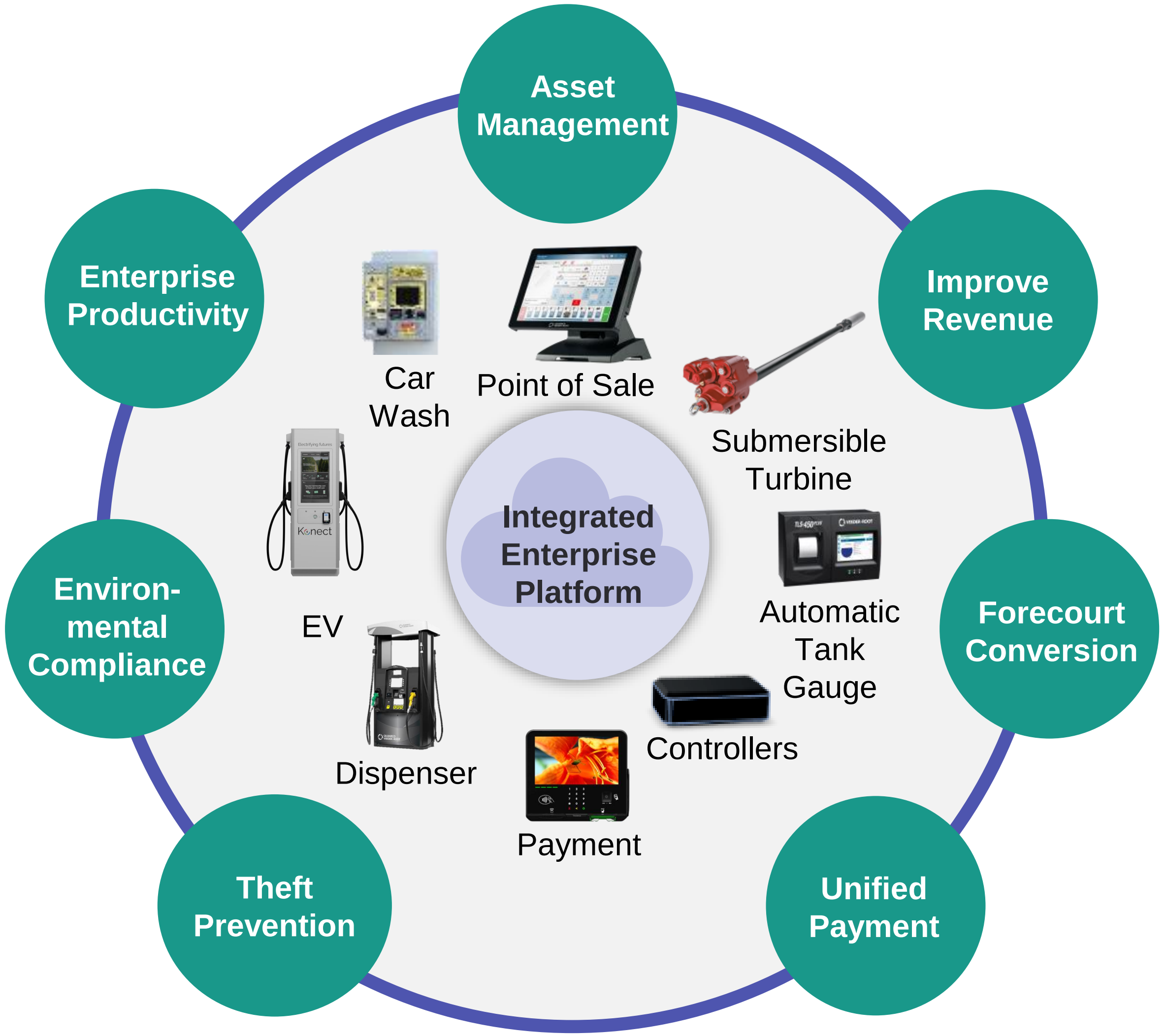
Key enabling solutions for an integrated mobility hub are now available at the right economics

The Risk of Standing Still is Higher Than Ever

Retailers that do not integrate systems risk fragmented consumer experiences and higher operating cost

Vontier's Integrated Solutions Strategy

Integrated solutions that simplify operations, increase uptime, reduce TCO*, and create agility



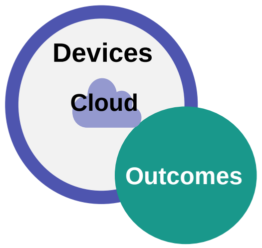
What Does It Deliver to Customers - Outcomes

- **Easy to develop:** Modern open, microservices, cloud-first design
- **Easy to deploy**: Integrated, plug & play, tested, compliant solutions
- **Easy to maintain**: Scalable, extendable, serviceable, and supported

What Does It Displace

- Siloed clunky and monolithic solutions
- Minimizes custom integrations
- Pivots from Hardware-led processes to Solution-led

LEGEND



Solutions that fuses three layers – Connectivity, Devices, and Enterprise Applications to deliver outcomes

*Total Cost of Ownership

Integration Sits at Two Levels – First at the Solution Level

Components share a common architecture for higher reliability and lower maintenance

Fueling Systems Example: HW + Payments + Media

Dispenser

Outdoor Payment Terminal

Remote Management

Media

Forecourt Controller

Solution Level: Integration by Design

- Seamless communication
- Higher uptime and resilience
- Faster innovation, data leverage & deployment of features
- Lower compliance and maintenance burden

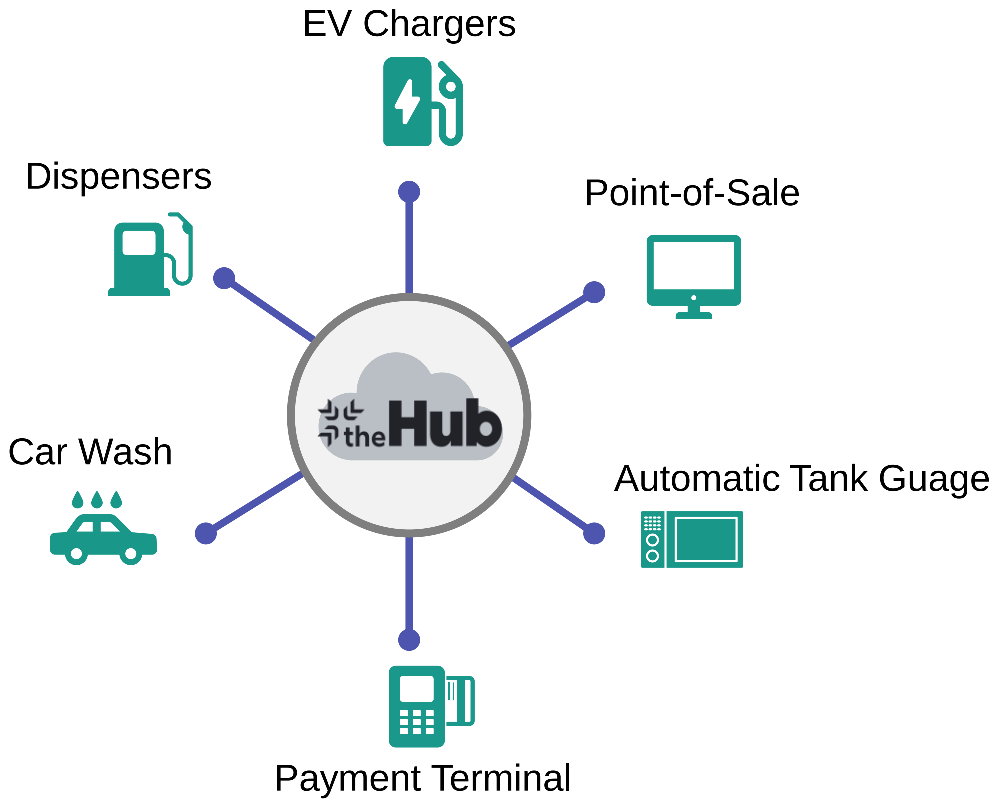
Second – at the Network Level to Create Unified Experiences

Integration is not just devices working together, its also creating a unified experience across a network

Network Level Platforms for Unified Experience

- Unified Experience: real-time dashboard for site visibility
- Remote diagnostic & resolution
- Centralized security & compliance
- Open architecture for extensibility

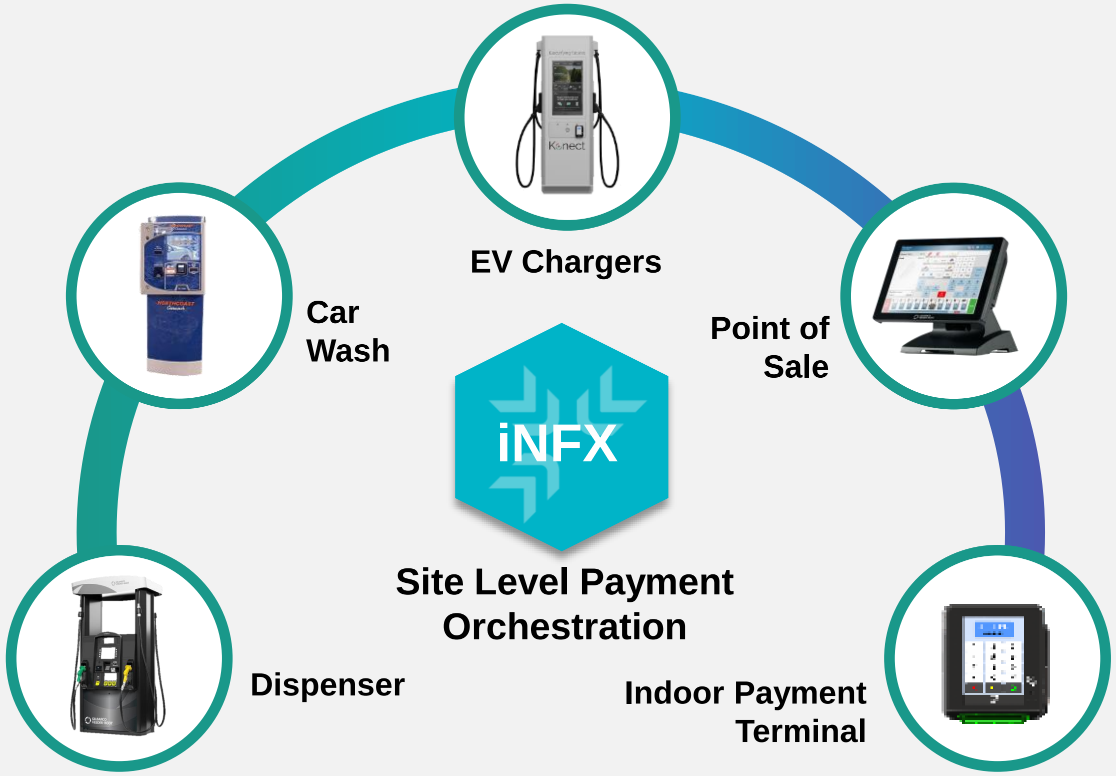
Asset Management Example



Network Example: Unified Payments for Seamless Transactions

Mitigates compliance burden and improves cost while delivering better customer experience

Vontier Unified Payment Solution



What is Unified Payment

Being able to pay for everything through a single HW + SW platform, no matter what the consumer journey is

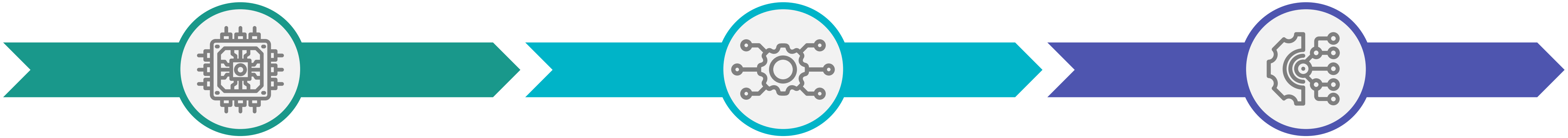
“Unified payment technology across fueling, EV chargers, car-wash, in-store was key for us; tremendous value to then drive loyalty and own the consumer experience across diverse assets”

Large National C-Store

Enabling the Connected Mobility Strategy

Building core capabilities across hardware, software, data, platforms

Physical Layer | *Digital Layer* | *Intelligence Layer*



Smarter Hardware

- Invested in foundational hardware elements
- Embedded compute
- Connectivity & Interoperability
- Hardware as a platform – standardization, simplification

Scaled Software

- Established global SW factory
- Expanded engineering talent from 500 to 1,200+ software engineers
- Investing in modern, modular, scalable architectures – enables ease of deployment, upgrades

Unified Data & Platforms

- Developing scalable platforms like iNFX and the HUB to unify operations
- Unlocking analytics, AI/ML, and predictive insights to enhance customer outcomes

Innovation Examples

These innovations create differentiated building blocks for the integrated solutions strategy

Physical Layer	*Digital Layer*	*Intelligence Layer*
Smarter Hardware	**Scaled Software**	**Unified Data & Platforms**

Smarter Hardware

TLS 450PLUS
Automatic Tank Gauge (ATG)

Leverage new, value-added features to drive **ATG upgrades**

Scaled Software

Veeder Root
Device Management Software

Real-time data to enable predictive maintenance, remote software upgrades, and **actionable insights**

Unified Data & Platforms

The Hub
Platform

Single cloud platform for using all cloud products and managing all assets/devices regardless of brand, region, and/or function

Approach Unlocks Significant Customer Value

Strategy achieves quicker innovation, better customer experiences, and lower costs for customers

Unlock new revenue, improve uptime, enhance customer experience, and lower costs and complexity

- **Lower total cost of ownership** – eliminating siloed systems and service contracts; reduce truck rolls with remote solutions
- **Improved operational efficiency** – automate processes and address labor shortage
- **Seamless consumer experience** – customer profiles, personalized media, loyalty management
- **Critical elements stay compliant 24x7** – safety, payments, environmental
- **Enable rapid innovation** – accelerate deployment of differentiated features

How This Creates Value

50%+
Cost reduction in total cost of ownership

75%
Time reduction to achieve certification

2x
Accelerated **speed to market** for new applications

200%
Accelerated deployment across network

Creates Growth and Efficiency Opportunities for Vontier

Approach expands TAM, Improves margins and increases customer stickiness

Expands TAM

From **$30B** to **$40B***

- Creating white space by moving from products to solutions and outcomes
- E.g., payment facilitation, revenue yield management, workflow automation

Increases Recurring Revenue

Recurring **Revenue 40%****

- Adds software and services based recurring revenue streams
- Positive mix shift through software margin contributions

Improves OPEX & Profitability

11 → 1 site controller platforms**

- Single connectivity architecture and edge leads to engineering efficiencies and scale
- Over-the-air activation & remote software upgrades reduces in-warranty expenses

*by 2030, **by 2028

Key Messages

Integrated Solutions

1 | Sites evolving into multi-service destinations where integration matters more than point-solutions

2 | Our customers need flexible and scalable solutions that simplify operations, increase uptime and adapt to the future

3 | Our integrated solution strategy achieves quicker innovation, better consumer experiences, and lower costs for customers

Q&A Panel

VONTIER™
Powering the way the world moves

Break

Powering the way the world moves

Industry Panel

VONTIER™
Powering the way the world moves

Powering the way the world moves

Financial Update

Anshooman Aga
Chief Financial Officer

Preliminary Q3 Results

Tracking towards the high-end of our guidance ranges

	Q3 Guidance (Jul 31st)	Prelim Q3 Results (Oct. 15th)
Sales	$745-755M	Slightly above midpoint
Adj. EPS	$0.74-0.78	Near/At high-end

Preliminary results for the third quarter 2025 are unaudited
Note: See “Non-GAAP Financial Measures on Slide 4

What You Heard Today

Evolving trends in Convenience Retail offer above-market growth opportunities

Convenience Retail

~$11B, +L/MSD growth

- Market consolidation and ongoing innovation driving growth
- Larger formats and existing site modernization driving significant capex investment

~67% of Total Vontier Sales

- **~45%** Environmental & Fueling
- **~14%** Retail Solutions (Invenco)
- **~7%** Car Wash (DRB)
- **~1%** EV Charging SW + Alt Fuels

1. Vontier has **leading positions**, with unmatched **portfolio depth & breadth**, and decades of **domain expertise**
2. **Industry is evolving** rapidly – an output of **strong secular trends** that are driving investments in **connected, integrated solutions**
3. **Uniquely positioned to win** – Connected Mobility strategy focused on producing outcomes our customers need now

Environmental & Fueling Solutions Segment

Mobility Technologies Segment

3-Pillar Value Creation Framework

We drive value through organic growth, operational excellence, and strategic capital deployment

Accelerating

Organic Growth

- Connected Mobility Strategy
- Impactful innovation
- Platform strategies

Optimizing

Margin Expansion

- Driving operational excellence through VBS
- Focus and prioritization (80/20)
- Higher mix of recurring revenue

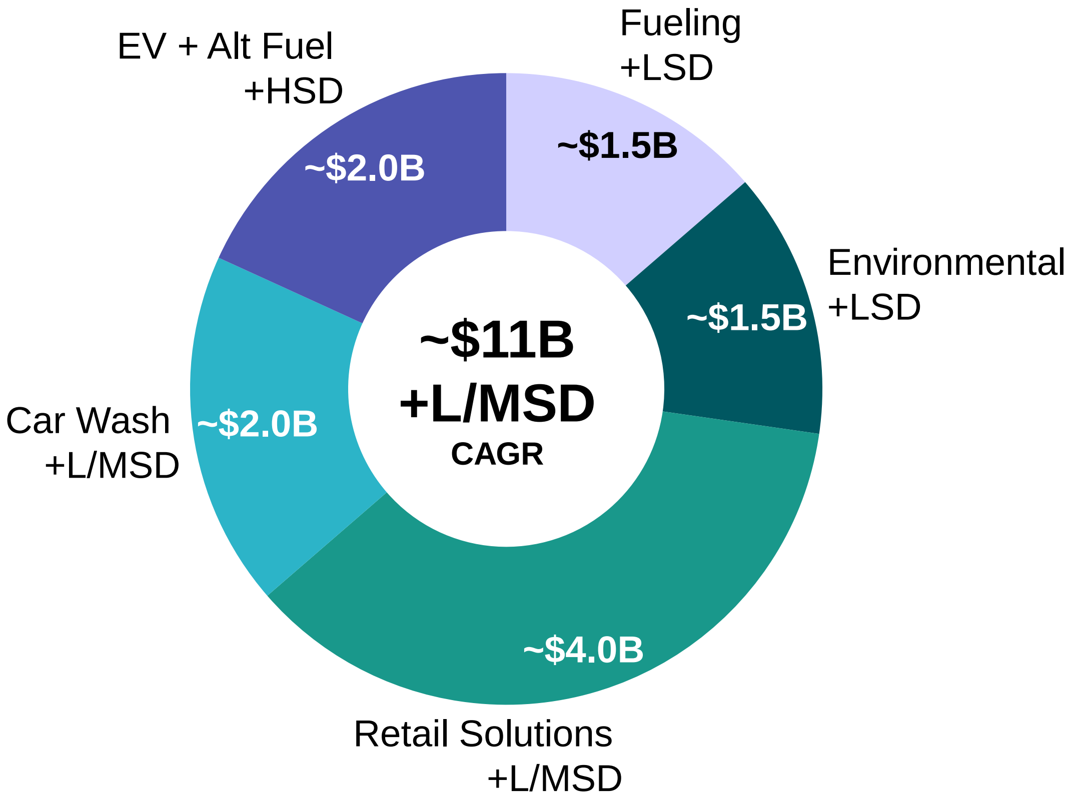
Deploying

Capital Allocation

- Returns driven
- Reinvesting for growth
- Returning cash to shareholders
- Strategic bolt-on M&A

Convenience Retail Poised for +MSD growth

Vontier delivering above market growth enabled by integrated solutions



Why We Win

- **#1 / #2** across all key verticals
- **Trusted partner** with large-scale operators
- Differentiation through **integrated solutions**

Through-Cycle
End Market Growth **+3-4%**

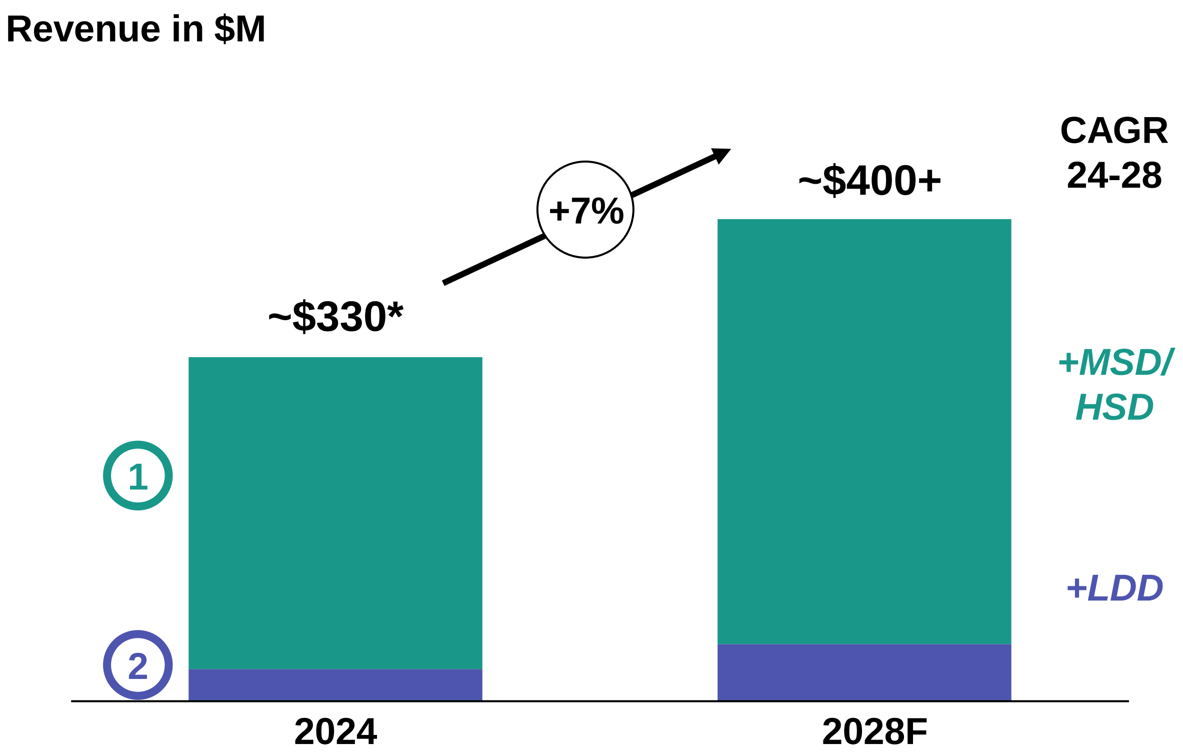
Vontier positioned to deliver **~100bps above market** growth

Vontier
revenue growth **+MSD**

Differentiated Solutions Gaining Traction

High-value offerings enabling above-market growth

Payment + Media* Poised for +M/HSD Growth



Key Growth Drivers

1 **Payments & Transactions**
- Regulations driving replacement cycle; Invenco's innovative payments offering driving growth
- Point of sale growth through innovation, e.g., modular architecture & new offerings such as foodservice

2 **Consumer Engagement**
- Media growth through cloud-based architecture & partnership with media providers

* Payment + Media part of the Retail Solutions (Invenco) portfolio; revenue base excludes enterprise productivity solutions

Driving Higher Recurring Revenues

Integrated Solutions across Convenience Retail key to accelerating recurring revenues over time

Convenience Retail

	Recurring Revenue Base*	Projected Growth (2028E)
Retail Solutions SaaS, SW maintenance & upgrades	$160M	+M/HSD
Car Wash SaaS, Payment aggregation & Aftermarket	$125M	+MSD
EV + Alt Fuel SaaS, SW maintenance & Upgrades	$20M	+DD
Fueling EFS Aftermarket Parts & Service	$360M	+MSD
"Other" Vontier Telematics, Matco Interest Income	~$280M	+LSD

~31%
of total Vontier Sales

Targeting ~40% of total Vontier sales**

*2024 Actuals; Not adjusted for sale of European Service; **By 2028*

Multi-Year Margin Expansion Opportunity

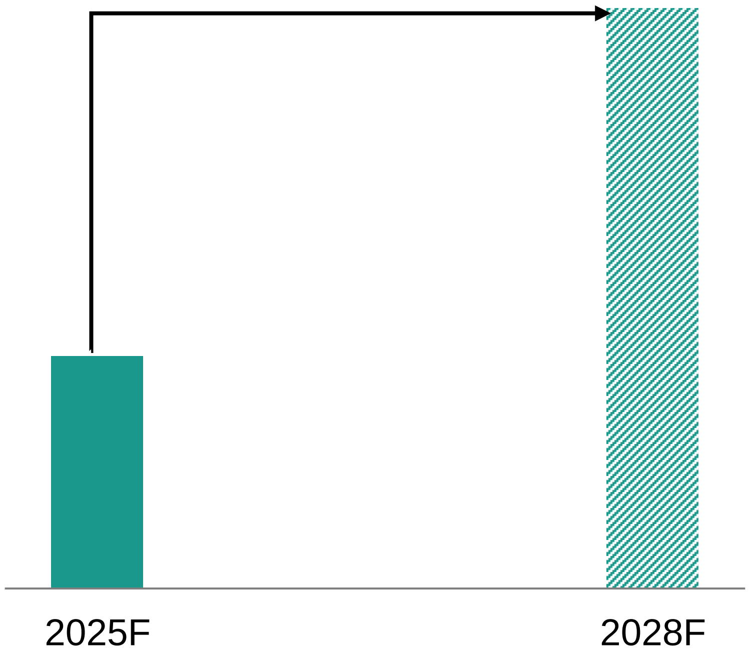
Sustainable 30-35% incrementals with upside from simplification and higher recurring revenue

Focus & Prioritization Process (80/20)

Driving a performance culture based on accountability

Solid Pipeline of Savings Potential

Expect **above average incrementals** over the next 3 years



Creating Capacity for Profitable Growth

Driving cost efficiency and redeploying resources towards accretive growth opportunities

Strategic Pricing

Customer Segmentation
Focus on high value customers;
Premium price for higher cost-to-serve

Product Segmentation
Premium prices for differentiated value propositions

Strong Governance
Enhanced policies, central pricing desk, appropriate DOAs

Advanced Analytics
Enabling optimal price setting

Cost of Engineering

20-25% overall cost reduction

18 → 9
global development centers

6
global development COEs

40-45% increase
in Engineering capacity

2X increase
in NPD velocity

Simplification

Portfolio management

~1M sq ft (>20%)
reduction in footprint

32 → 14 → 8
global dispenser platforms

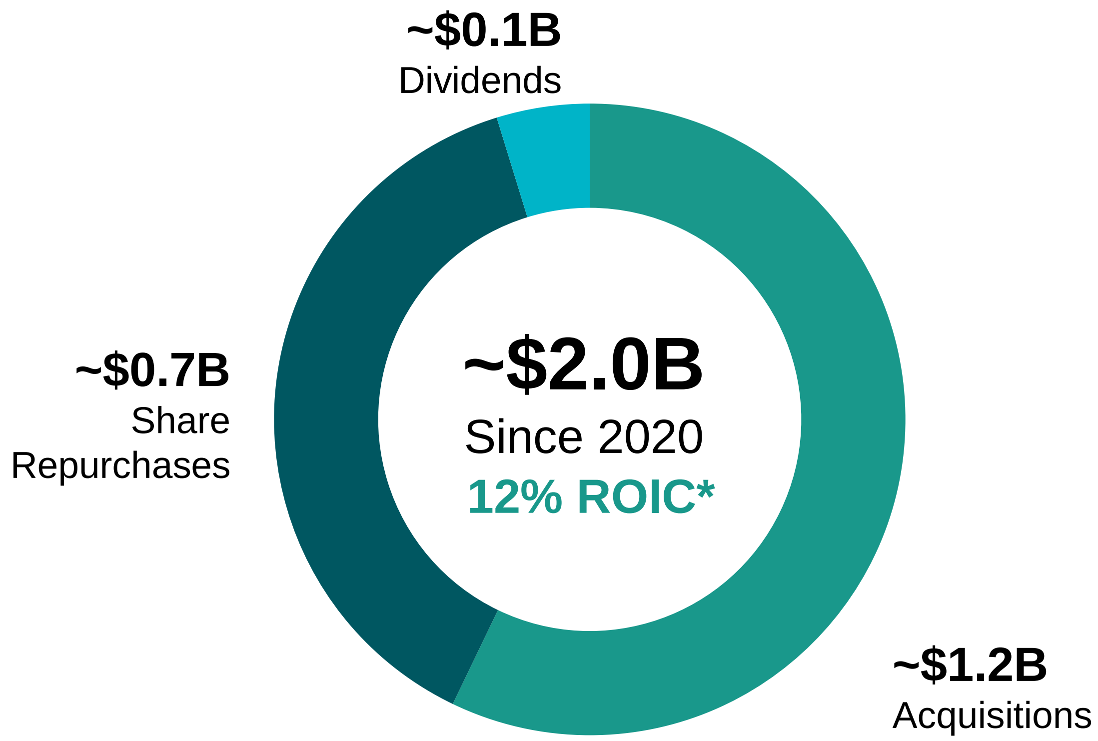
30 → 20 → 6
global SW platforms

1% → 30% → >50%
component standardization

Disciplined Approach to Capital Allocation

Reinvesting in our business and maximizing shareholder value creation

Total Capital Deployed



Clear Capital Allocation Priorities

1. Accelerate organic growth
2. Maintain dividend
3. Allocate capital to the highest expected return option
   - Share Repurchases
   - Bolt-On Acquisitions
   - Debt Paydown

*ROIC calculated as of 9/30/25; Note: See "Non-GAAP Financial Measures" on Slide 4

Effective Portfolio Management

Supplementing organic growth with strategic bolt-on acquisitions while divesting non-core assets

Strategic Criteria

- Clear “right to win”
- High barriers to entry
- Leading market position
- Strong/sustainable competitive advantage (i.e., tech)

Financial Criteria

- Double-digit ROIC by Year 3 to 5
- Accretive to topline & cash EPS

Strategic Bolt-On

SGT SUDZ INDUSTRIAL AUTOMATION

- VOC identified clear customer need for real-time visibility into car wash operations
- Sgt. Sudz recognized as best-in-class motor control panels
- Validated competitive advantage, market position and synergy
- Obvious opportunity to expand our technology advantage

Non-Core Divestiture

European Services

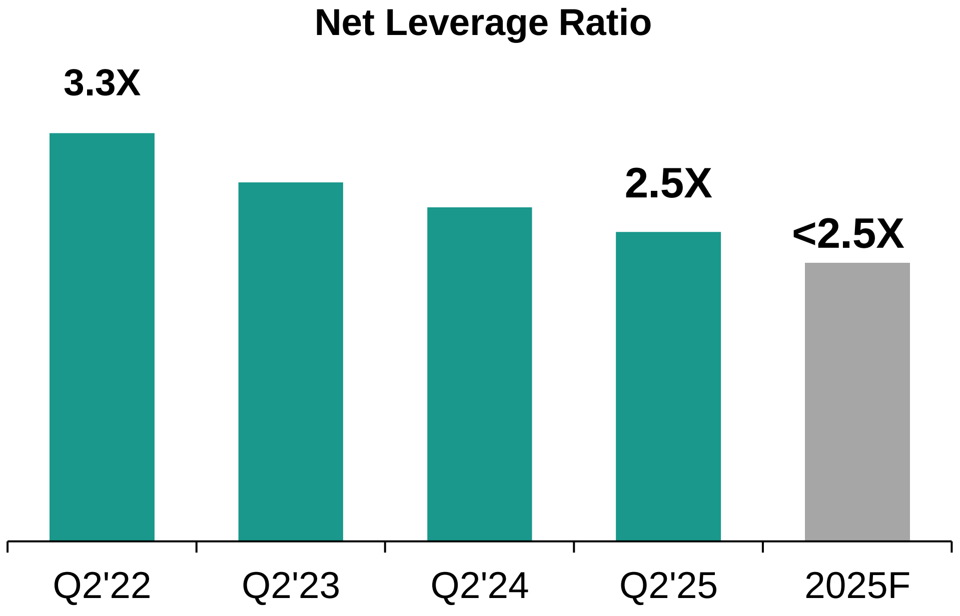
GILBARCO VEEDER-ROOT Powered by Vontier

- Hyper-competitive, fragmented service model
- Labor-intensive offering with limited ability to differentiate or create competitive advantage
- Helps Vontier/Gilbarco reallocate internal resources toward higher growth opportunities and still provide high-value aftermarket parts

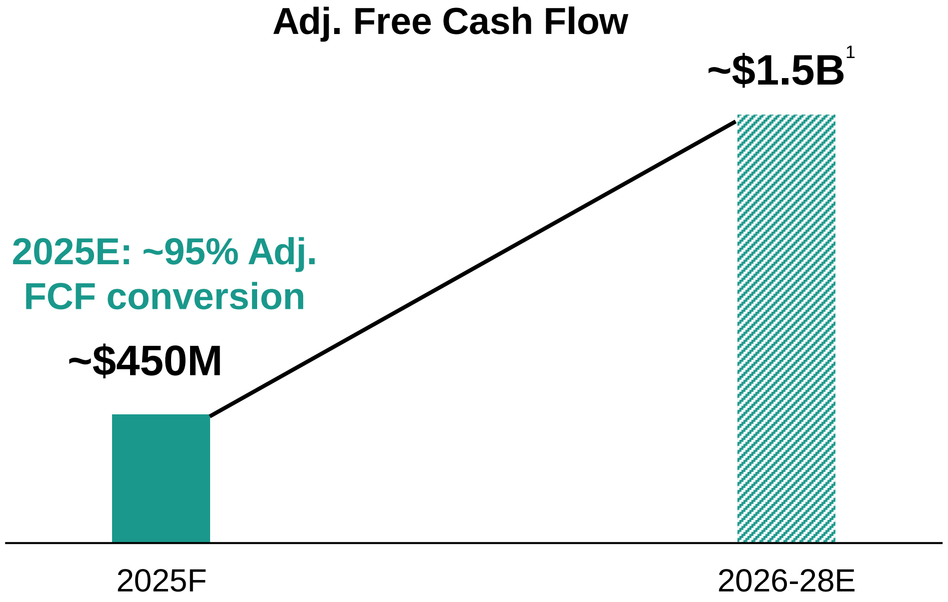
Strong Balance Sheet and Cash Generation

Ample liquidity and optionality to amplify shareholder returns

Committed to Maintaining Investment Grade Credit Rating



Strong Free Cash Flow Supports Significant Optionality



Targeted Adj. FCF Conversion

>90%

1. Cumulative forecasted adjusted free cash flow.

Note: See "Non-GAAP" Financial Measures" at the start of the deck

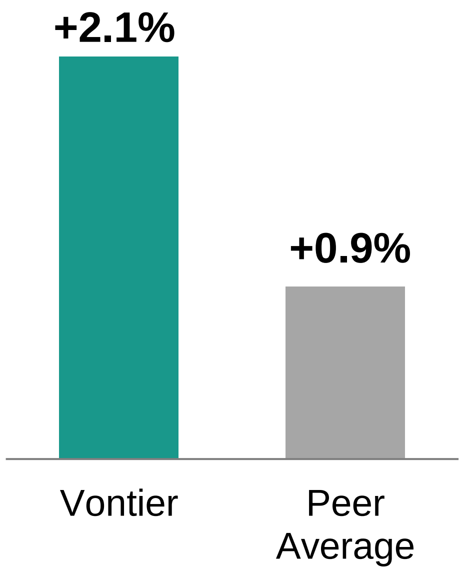
VONTIER™

Compelling Opportunity

Financial performance ahead of or in line with Industrial peers

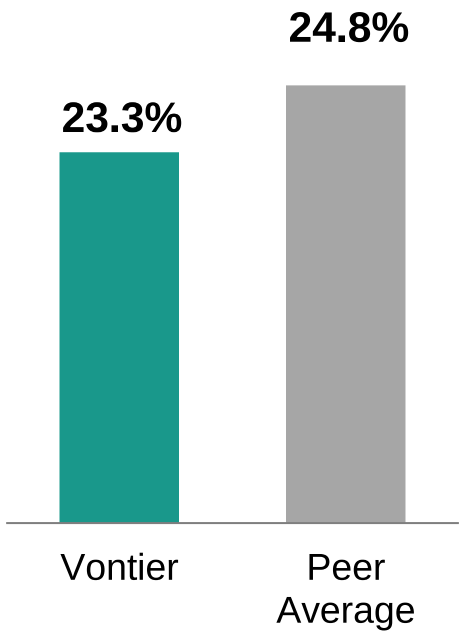
Core Sales Growth

2023 - 2025E



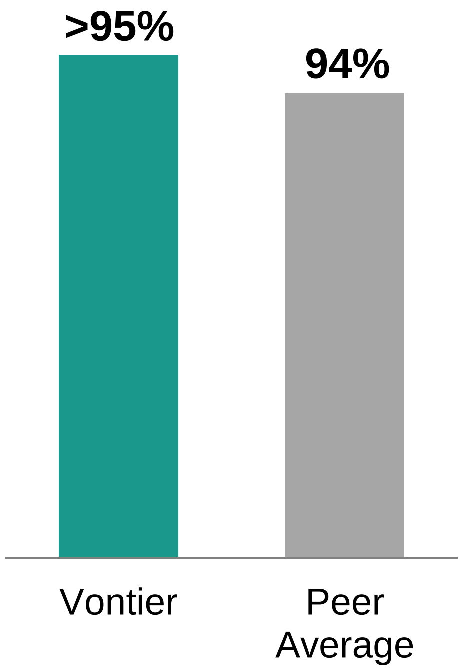
Adj. EBITDA %

2025E



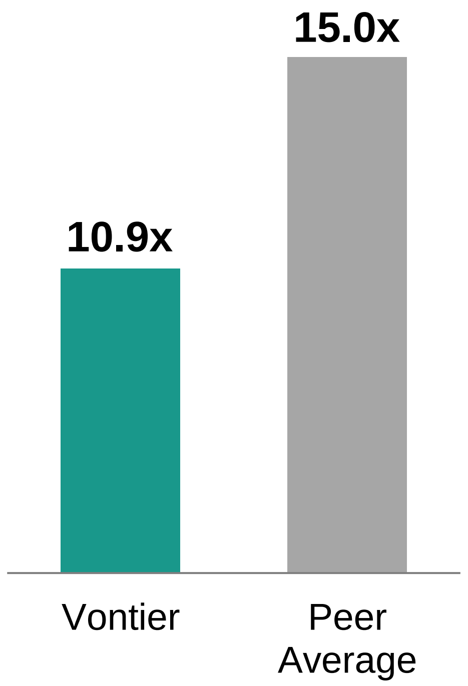
Adj. FCF Conversion %

2025E



EV/EBITDA*

2025E



Peer set: 3M, Dover, Fortive, Franklin Electric, Gates, Honeywell, Idex, ITW, Ingersoll Rand, ITT, Nordson, Parker Hannifin, Regal Rexnord, Snap-On, Stanley Black & Decker

*Valuation multiple as of 9/302025, on Adj. EBITDA; Note: See “Non-GAAP Financial Measures” on Slide 4

Key Messages

Executing on our strategy, delivering differentiated solutions and driving above-market growth

1 **Focused.**
Vontier is transforming, with a more focused portfolio and clear strategic priorities

2 **Leading.**
Leading positions in attractive end markets, with a unique portfolio and global scales and decades of domain expertise

3 **Accelerating.**
Delivering differentiated technologies and integrated solutions to deliver above-market growth and expand our recurring revenue base

4 **Disciplined.**
Committed to consistent operational execution, leveraging a culture of continuous improvement and simplification initiatives; Disciplined capital allocation to maximize shareholder value

Appendix

VONTIER™
Powering the way the world moves

Mapping Segments to End Markets

Segment Key: EFS | MT | RS

Convenience Retail & Fueling ~67% FY Sales		Auto Repair Tools ~20% FY Sales	Fleets ~13% FY Sales
Global Dispensers	Retail Solutions (Invenco)	Matco	Alt Fuels (ANGI)
Environmental	Car Wash (DRB)		Fleets (Teletrac)
Aftermarket & Service	EV (Driivz)		

Solution Growth Drivers

All stand to benefit from new product launches in ‘25

Global Dispenser: Continued consolidation, NTI buildout and R&R

Environmental: Demand for underground solutions, globally

Aftermarket: Large and growing installed base, focus on aftermarket parts

Retail Solutions: Adoption of unified payment and enterprise productivity solutions

Car Wash: Car wash market has recovered. Continued consolidation and buildout, membership penetration

EV: Global adoption of EV

Auto Repair: New product vitality and +LSD growth in new franchisees

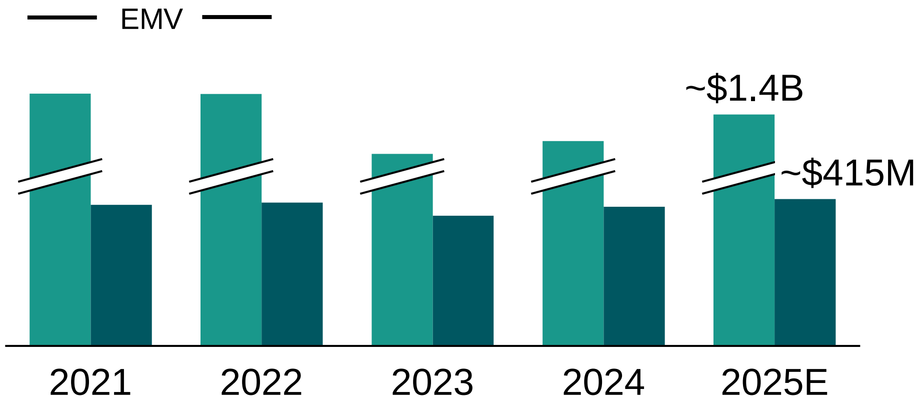
Increasing vehicle miles travelled, aging and complex car park, sensor proliferation

Alternative Fuels: Favorable pricing dynamics for alt. fuels and adoption of alt. fuels globally

Fleets: increasing demand for safety-enhancing analytics, reporting capabilities, and adoption of alternative fuels

Environmental & Fueling Solutions (EFS)

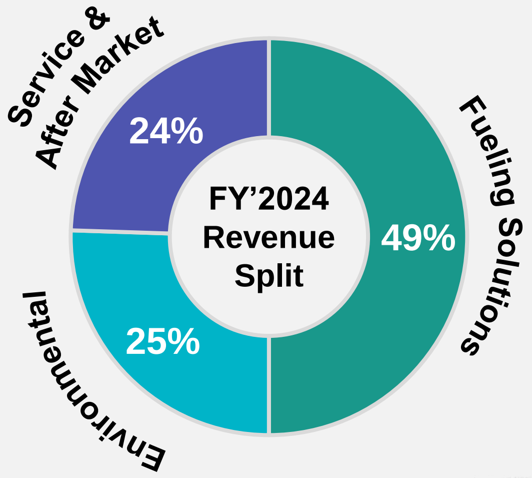
- Leading global provider of emission limiting HW and SW solutions and aftermarket services for fueling infrastructure
- Delivering integrated, digitally-enabled solutions through a comprehensive portfolio, backed by strong channel presence and deep customer relationships

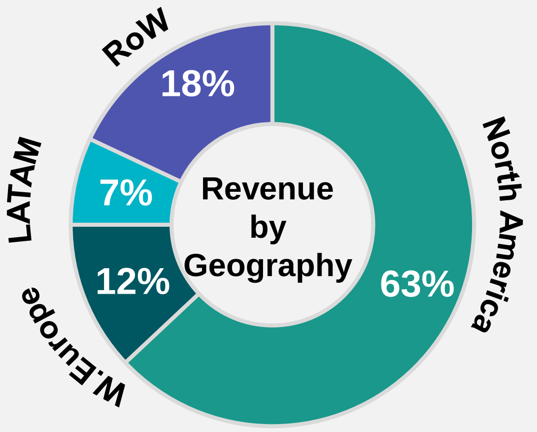


Note: See "Non-GAAP Financial Measures" on Slide 4

EFS Highlights

~$7B+ TAM	**~4%** CAGR* Growth	**#1** Global Fueling Infrastructure
~$1.44B Sales 2025E	**~30%** Margin 2025E%	**250,000+** Global Fueling Sites Served






Automated Tank Gauges

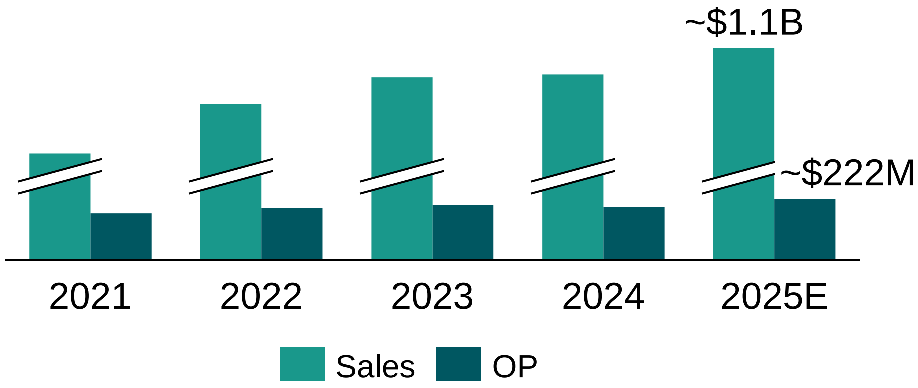

Fuel Dispensers


Submersible Turbine Pumps


Fuel Conditioning Systems

Mobility Technologies (MT)

- Leading global solutions provider to convenience retailing, independent retailing, car washes, and fleets
- Providing POS and payment acceptance, IoT-based vehicle monitoring, EV charger network management SW, and low/zero carbon fueling systems

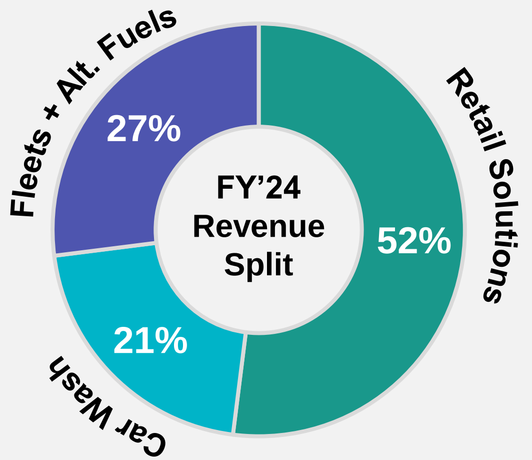


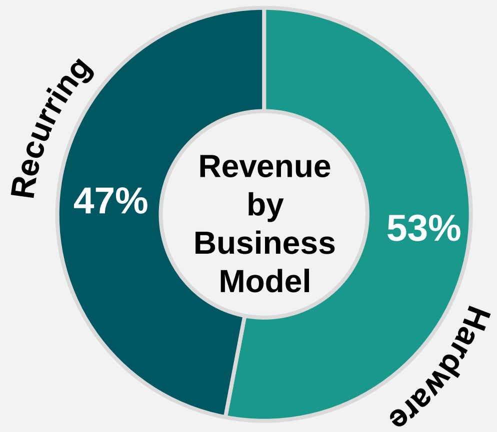
invenco Powered by Vontier · Teletrac Navman Powered by Vontier · DRB Powered by Vontier · ANGI Powered by Vontier

Note: See "Non-GAAP Financial Measures" on Slide 4

MT Highlights

~$8B+	~5%	#1
TAM	CAGR* Growth	Car Wash Technology Solution
~$1.10B	**~20%**	**#2**
Sales 2025E	Margin 2025E%	Payment POS Solution






Payment Terminals


Point of Sale Systems

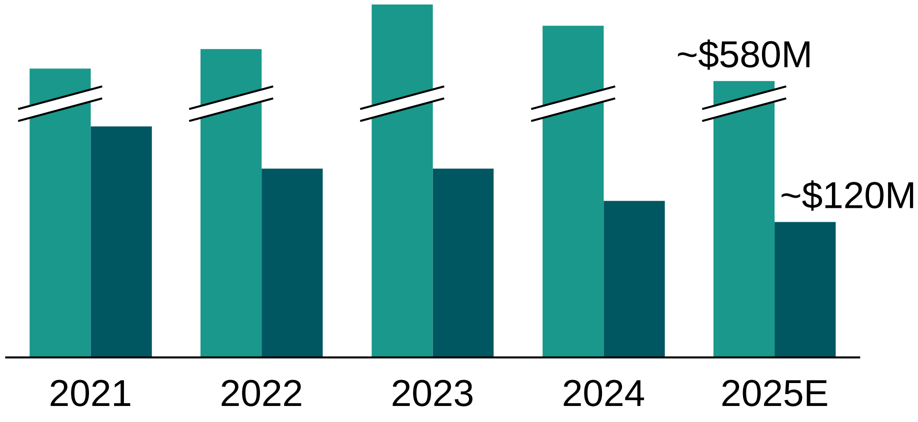

Car Wash System Solutions


Alt. Energy Fueling Systems


EV Charging Software Solutions

Repair Solutions (RS)

- Leading manufacturer and distributor of vehicle tools, toolboxes, diagnostic equipment, and SW for auto aftermarket
- Providing quality equipment and financial services to franchisees and technicians

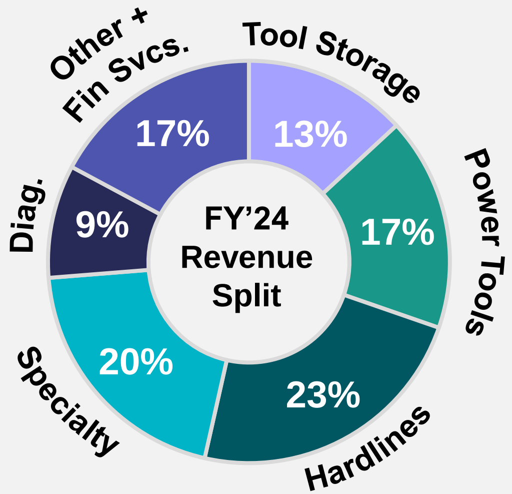


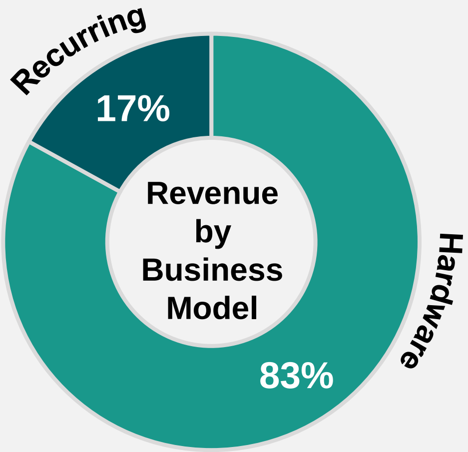
MATCO TOOLS
Powered by Vontier

Note: See "Non-GAAP Financial Measures" on Slide 4

RS Highlights

~$3B+	~(5%)	#2
TAM	CAGR* Growth	Provider of Specialized Auto Tools & Equipment
~$580M	**~20%**	**100%**
Sales 2025E	Margin 2025E%	North America Exposure





Tool Storage

Diagnostic Equipment

Power Tools

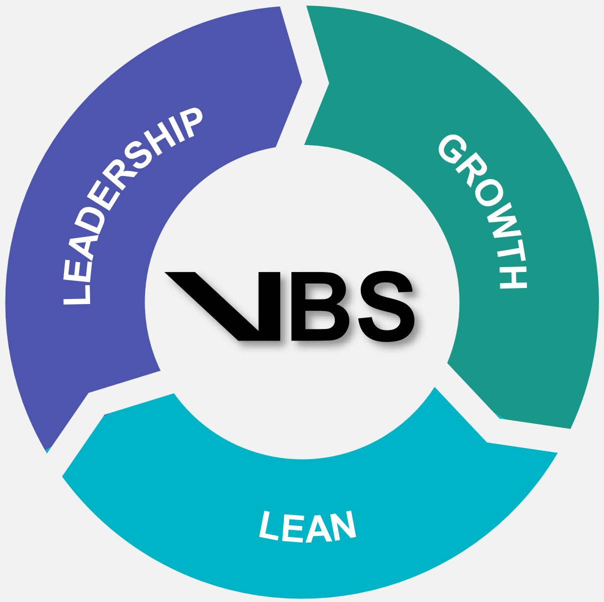
Hand Tools

Merch and PPE

Vontier Business System (VBS)

The Cornerstone of Our Culture and a Competitive Advantage

Culture of Continuous Improvement



Extends **30+ year culture and heritage**

VBS | FUNDAMENTALS

Growth / Innovation

- Agile Software Development
- Transformative Marketing
- Funnel Management
- Launch Pad

Lean

- Lean Conversion
- Vontier Materials System
- Vontier Reliability System

Leadership

- Policy Deployment
- Focus & Prioritization Process (FPP)
- Accelerating My Success

PRODUCTIVITY

✓ **Purchase Price Variance (PPV)**
- Supplier management
- Supply chain optimization

✓ **Value Analysis / Value Engineering (VAVE)**
- Solution and component re-design
- Increased component standardization

✓ **Labor Productivity**
- Consolidation & localization of mfg footprint
- Shared service centers

✓ **Periodic Restructuring**
- e.g., Post-EMV cost structure alignment

Sustainability Is at the Heart of Our Business

2020
- Launched our corporate purpose: **Mobilize the Future to Create a Better World**

2021
- Created our North Star Vision: **Accelerating Smart Sustainable Solutions**
- Completed and published first GHG inventory
- Published Scopes 1 & 2 GHG goals

2022
- Decreased Scopes 1 & 2 GHG emissions by 19%
- Completed ISO14001 certification for 77% of manufacturing facilities
- SBTi (Science Based Targets initiative) validation on GHG reduction targets

2023
- Published first Scope 3 GHG goal; published first water goal
- Launched **EVolve** brand

2024
- Launched an employee **Sustainability Leadership Development Program**
- Published first Task Force on Climate-related Financial Disclosures (TCFD)
- Published first waste goal

2025
- **Completed first Life Cycle Assessment (LCA)** on one of our projects
- Published first Climate Transition Action Plan, including climate change scenario planning

Alternative Energy and Non-ICE Acquisitions

2021: DRB, driivz, sparkion

2022: invenco by GVR

EV Charging Plugs Under Management

2022	2023	2024
30,000	55,000	110,000

Sustainable Solutions Launched

2022
- Sustainable Mining Solution
- TTN EV Readiness Tool
- EV insulated repair tools

2023
- 100th RNG site for WM
- First H2 dispensers shipped
- First HR station shipped
- Biofuel leak detector
- Wireless tank probe
- FlexPay6

2024
- Turnkey EV charging solutions – Konnect
- PCN5 Board with Cat3 Certification

Recognitions and Awards

2023 & 2024: Recognized by Newsweek as one of America's "Most Responsible Companies"

2024 & 2025: Included in TIME magazine's "World's Most Sustainable Companies"

Sustainability Goals and Progress

CATEGORY	CURRENT GOALS		PROGRESS		PROGRESS TO GOAL
Scope 1 & 2 GHG Emissions—Near-Term	45%	reduction in absolute Scope 1 and 2 GHG emissions by 2030 from 2020 base year	↓40%	reduction in absolute Scope 1 and 2 GHG emissions from adjusted 2020 base year[2]	
Scope 1, 2, & 3 GHG Emissions—Long-Term	NET ZERO	by 2050 in support of the Paris Climate Agreement	8	facilities powered by renewable energy, including five of our nine manufacturing sites	Multiple Initiatives Underway
Scope 3 GHG Emissions—Near-Term	25%	reduction in absolute Scope 3 GHG emissions by 2030, from 2020 base year	↓1%	decrease in absolute Scope 3 GHG emissions from adjusted 2020 base year[3]	
Water Conservation	100%	implementation of water risk assessments and conservation plans by end of 2026 at high-priority manufacturing sites[1]		published Water Management Policy, completed water risk assessments for all manufacturing sites and identified four high-priority sites	
Waste Diversion	90%	aggregate diversion of manufacturing site waste from landfill by 2030, from 2023 base year	83%	aggregate diversion of manufacturing site waste from landfill	
Workplace Safety	0.34	TRIR by YE 2026, from 2022 base year	↓ 46%	reduction in TRIR from 2022 base year	Goal Achieved
	0.28	DART by YE 2026, from 2022 base year	↓ 43%	reduction in DART from 2022 base year	Goal Achieved
ISO Certification	100%	of manufacturing sites ISO 14001 Environmental Management System and ISO 45001 Occupational Health and Safety certified by 2026	100%	of manufacturing sites are ISO 14001 certified *(up from 83% in 2023)*	Goal Achieved
			78%	of manufacturing sites are ISO 45001 certified *(up from 58% in 2023)*	

Recognitions & Achievements

Vontier's performance across the sustainability spectrum brought well-deserved recognition in 2024.

Newsweek's Most Responsible Companies list recognition for the second consecutive year

TIME's World's Most Sustainable Companies

International Safety Awards Distinction Winner by the British Safety Council

ESG AA Leader designation from MSCI

Low Risk rating from Sustainalytics

Silver sustainability rating from EcoVadis

"B" rating on the Climate Change Questionnaire and "B-" on the Water Security Questionnaire from the Carbon Disclosure Project

93rd percentile of the S&P Global Corporate Sustainability Assessment

Triangle Business Journal's Best Places to Work

Top Performer on Employee Wellness Topic from JUST Capital

Proud Military Friendly Employer, Military Spouse Friendly Employer, and Military Friendly Brand

Member of the Valuable 500

American Heart Association's Health Work Culture Gold Award recipient