Fourth Quarter and Full Year 2021

Earnings Webcast

February 23, 2022

VISTA
ENERGY FOR TOMORROW

About projections and forward-looking statements

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Continued growth in a positive free cash flow quarter

Q4 2021 highlights:

41.1 Mboe/d
+34% y-o-y
Production [1]

117 $MM
+224% y-o-y
Adj. EBITDA [3]

32.4 Mbbl/d
+41% y-o-y
Oil Production

97 $MM
0% y-o-y
CAPEX [4]

196 $MM
+146% y-o-y
Revenues

62.8 $MM
Free Cash Flow [5]

7.5 $/boe
(7)% y-o-y
Lifting Cost [2]

35.4 $MM
Adj. Net Income [6]

(1) Includes natural gas liquids (NGL) and excludes flared gas, injected gas and gas consumed in operations
(2) Excludes the 50% non-operated interest in Aguada Federal and Bandurria Norte. Lifting cost includes production, transportation, treatment and field support services; excludes crude stock fluctuations, depreciation, royalties, direct taxes, commercial, exploration and G&A costs
(3) Adj. EBITDA = Net (loss) / profit for the period + Income tax (expense) / benefit + Financial results, net + Depreciation + Restructuring and Reorganization expenses + Impairment of long-lived assets + Other adjustments
(4) Property, plant and equipment additions. Excludes the additions for 30.1 $MM related to the transfer of "Exploration rights" of CS-01 since this transaction did not generate cash flows
(5) Free cash flow is calculated as Operating activities cash flow plus Investing activities cash flow
(6) Adjusted net income/loss = Net profit/loss + Deferred Income Tax + Changes in the fair value of the warrants + Impairment of long-lived assets

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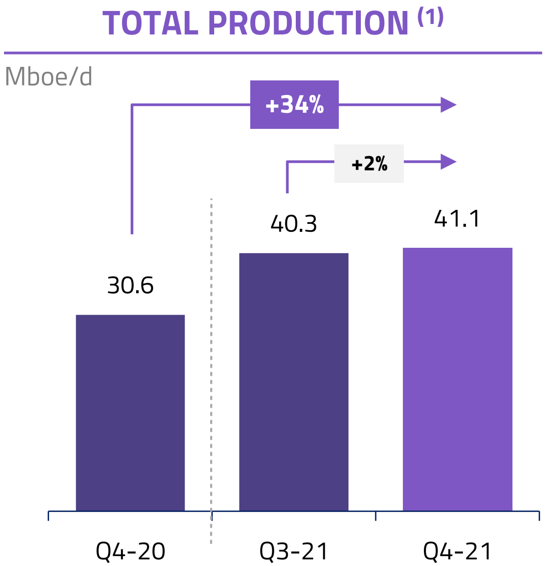
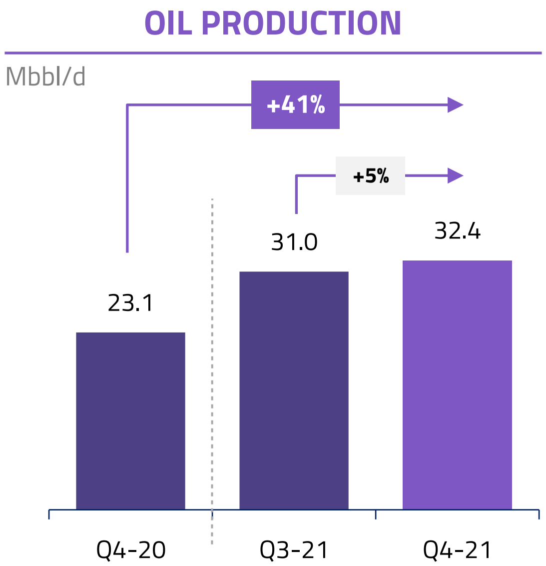
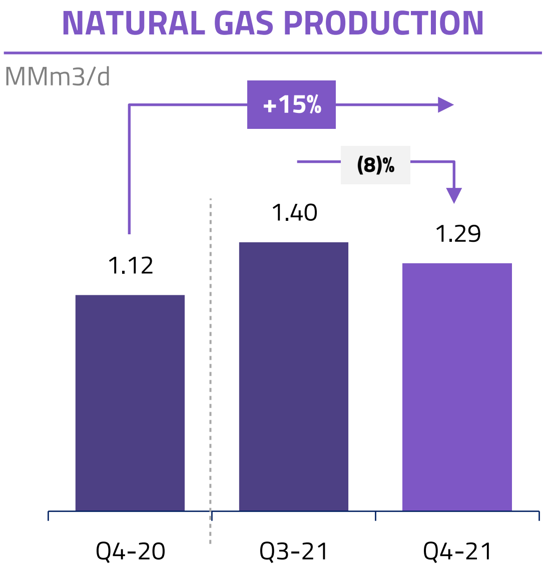
Production growth driven by solid Bajada del Palo Oeste performance





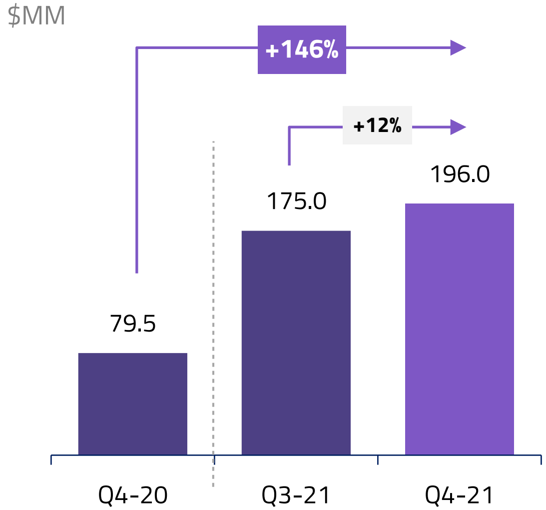


- Total production increase mainly driven by Bajada del Palo Oeste, which continues to deliver productivity above type curve
- Tied-in pad #10 in late December [2], totaling 20 wells tied-in during 2021 and delivering on annual guidance
- Oil production growth y-o-y driven by Bajada del Palo Oeste oil content (~90%)

(1) LPG production in Q4 2021 totaled 524 boe/d, compared to 519 boe/d in Q3 2021 and 518 boe/d in Q4 2020
(2) Landed two wells in La Cocina and two wells in Orgánico. Average lateral length of 2,854 mts and 54 average stages per well

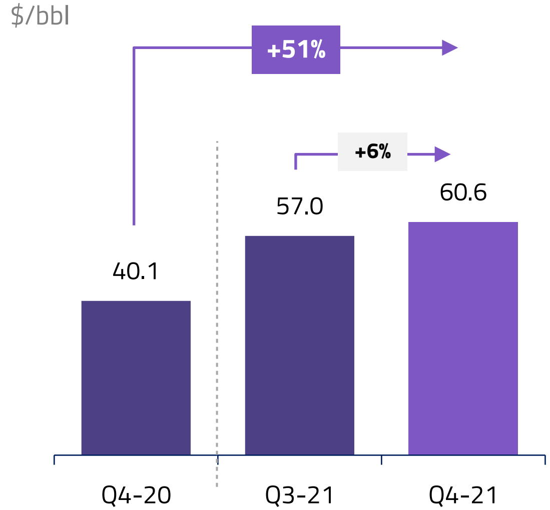
Strong y-o-y revenue growth

REVENUES



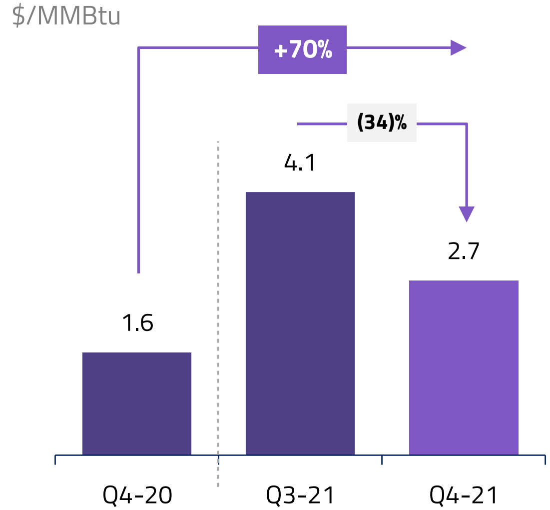
- Strong increase y-o-y, driven by 41% boost in oil production and 51% improvement in oil realization prices

AVERAGE CRUDE OIL PRICE



- 33% of crude oil sales volumes were to export markets
- Already locked-in 100% of Q1-22 sales

AVERAGE NATURAL GAS PRICE



- Robust y-o-y- price increase driven by Plan Gas summer prices of 2.7 $/MMBtu (~70% of volumes)
- Industrial markets averaged 2.7 $/MMBTU, 131% above y-o-y, supported by strong recovery in demand

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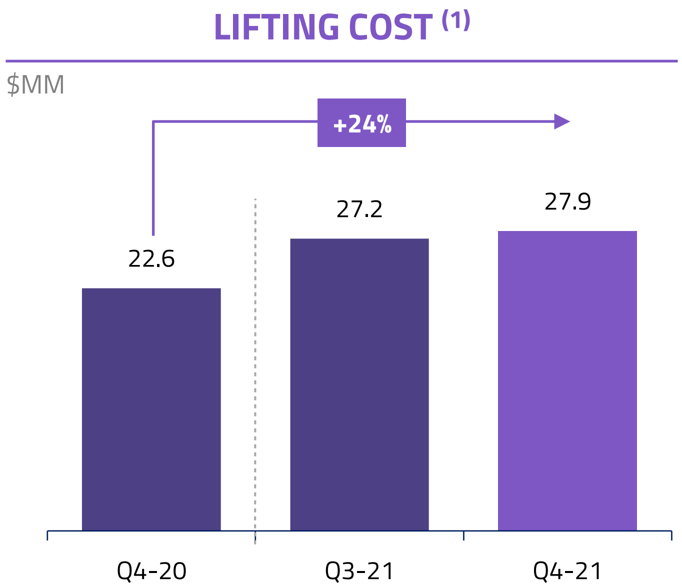
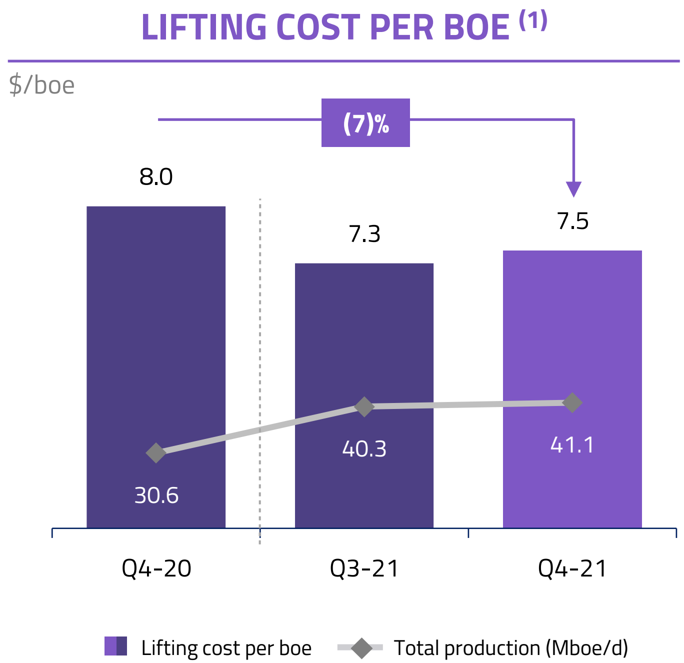
Continued to achieve cost efficiencies

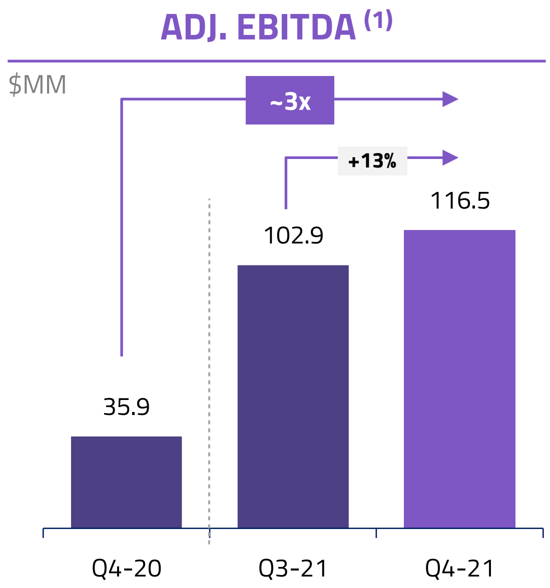


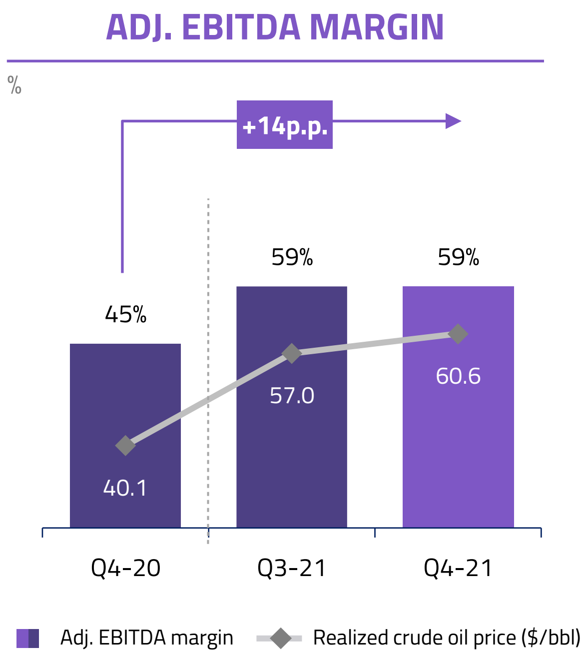


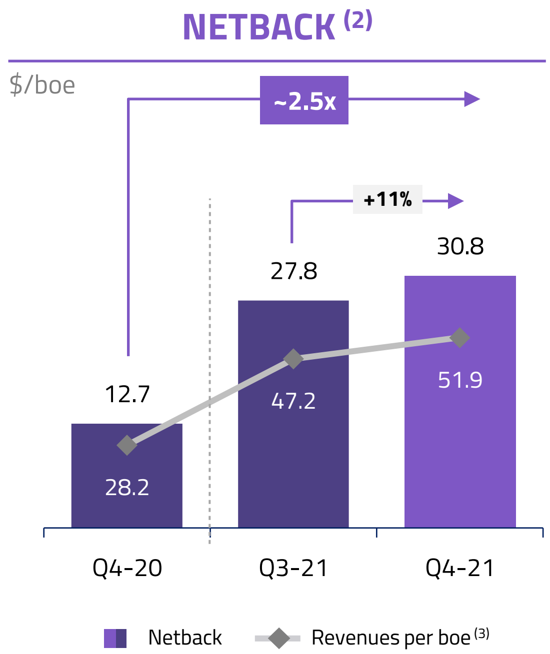
- Reduced 7% lifting cost per boe y-o-y in operated blocks, as incremental production continues to absorb fixed cost base
- 50% non-operated WI in Aguada Federal and Bandurria Norte adds 2.4 $MM and 0.5 $/boe to lifting cost in Q4-21

(1) Excludes the 50% non-operated interest in Aguada Federal and Bandurria Norte. Including such working interest, total lifting cost is 8.0 $/boe and 30.3 $MM in Q4-21. Lifting cost includes production, transportation, treatment and field support services; excludes crude stock fluctuations, depreciation, royalties, direct taxes, commercial, exploration and G&A costs

~3x expansion of Adjusted EBITDA





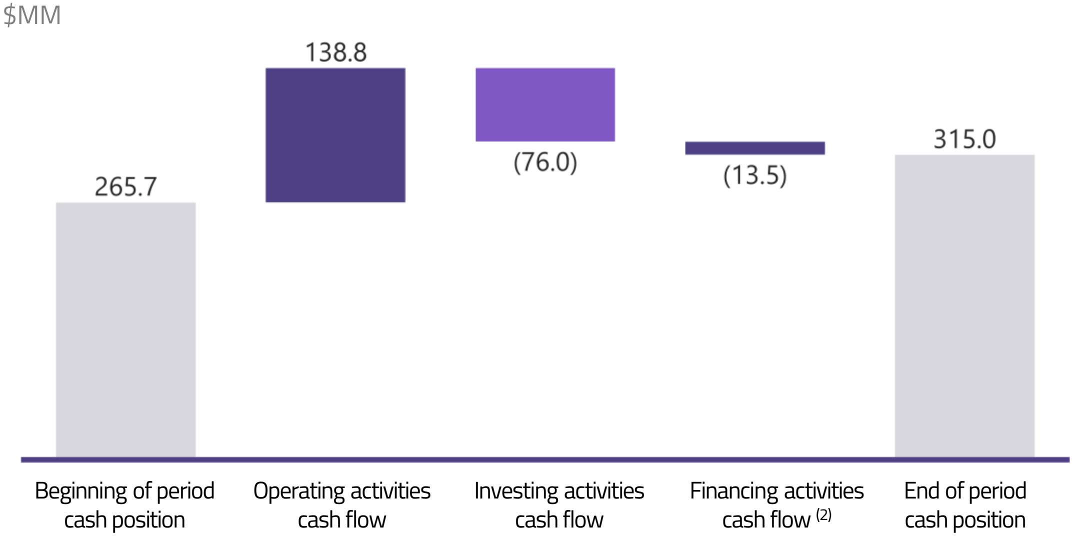


- Adj. EBITDA increased ~3x y-o-y, driven by increase in revenues amid flat lifting costs
- Adj. EBITDA includes 4.5 $MM from Trafigura JV (1 pad tied-in)
- Netback increased ~2.5x, as stable costs per boe allowed us to capture full increase in realized prices

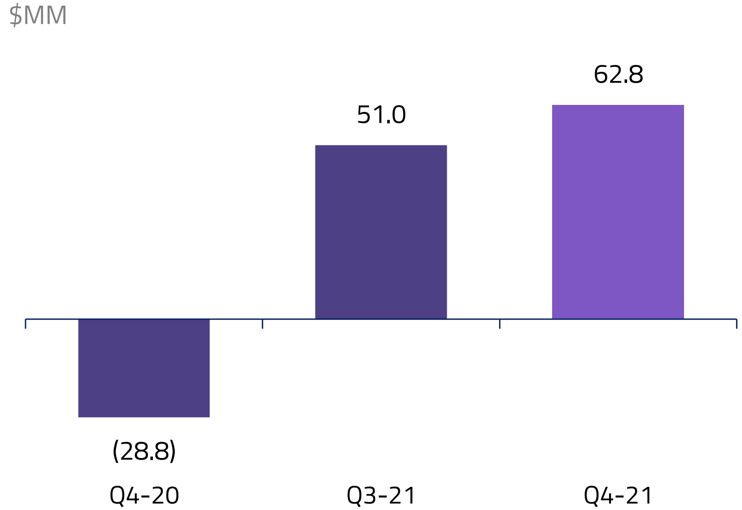
(1) Adj. EBITDA = Net (loss) / profit for the period + Income tax (expense) / benefit + Financial results, net + Depreciation + Restructuring and Reorganization expenses + Impairment of long-lived assets + Other adjustments
(2) Netback = Adj. EBITDA (in $MM) divided by total production (in MMboe)
(3) Revenues per boe = Total revenues (in $MM divided) by total production (in MMboe)

Positive free cash flow quarter

Q4 2021 CASH FLOW EVOLUTION [1]



FREE CASH FLOW [3]



- Positive free cash flow quarter, for a total of 62.8 $MM [3]
- Strong cash flow generated by operations, which increased ~5x y-o-y
- Cash flow used in investing activities was 76.0 $MM, with capex activity of 97.3 $MM [4]
- Cash flow used in financing activities was 13.5 $MM, mainly driven by interest payments of 3.8 $MM and debt repayments of 1.6 $MM [2]

(1) Cash is defined as Cash and cash equivalents
(2) For the purpose of this graph, cash flow generated by financing activities is the sum of: (i) cash flow generated by financing activities for (8.1) $MM; (ii) effects of exchange rate changes on the balance of cash held in foreign currencies for (4.9) $MM; and (iii) the variation in Government bonds for (0.5) $MM
(3) Free cash flow is calculated as Operating activities cash flow plus Investing activities cash flow
(4) Excludes the additions for 30.1 $MM related to the transfer of "Exploration rights" of CS-01 since this transaction did not generate cash flows

Delivered strong total shareholder return in 2021

Full year highlights:

Increased P1 reserves and well inventory	▪ Increased P1 reserves to 181.6 MMboe, resulting in an implied RRR of 477% ▪ Acquired 50.4k core acres in Vaca Muerta at favorable terms, adding ~300 locations to our new well inventory
Delivered solid operating performance	▪ Increased total production 46% y-o-y to 38.8 Mboe/d, driven by the tie-in of 20 new wells in Bajada del Palo Oeste, delivering on 2021 guidance ▪ Reduced Lifting cost 18% to 7.4 $/boe, delivering on 2021 guidance (1) ▪ Reduced D&C cost by 18% y-o-y, to 10.0 $MM per well (2)
Strengthened balance sheet	▪ Reduced Net leverage ratio to 0.8 x Adj. EBITDA at Dec-21 ▪ Recorded 105.9 $MM positive free cash flow (3) ▪ Raised ~260 $MM in the Argentine debt capital markets during 2021, improving average debt duration to 2.5 years at YE2021 from 1.5 at YE2020
Reinforced commitment to sustainability	▪ Published inaugural Sustainability Report ▪ Reduced GHG emissions by 14% implying a reduction in intensity of 39% to 24.1 $kgCO_2e$/boe (4) ▪ Established our ambition to become net zero in 2026 (4)

(1) Excludes the 50% non-operated interest in Aguada Federal and Bandurria Norte. Including such working interest, total lifting cost is 7.6 $/boe in 2021. Lifting cost includes production, transportation, treatment and field support services; excludes crude stock fluctuations, depreciation, royalties, direct taxes, commercial, exploration and G&A costs
(2) Normalized to a standard well design of 2,800 meters lateral length and 47 frac stages well
(3) Free cash flow is calculated as Operating activities cash flow plus Investing activities cash flow
(4) Scope 1 & 2 GHG emissions

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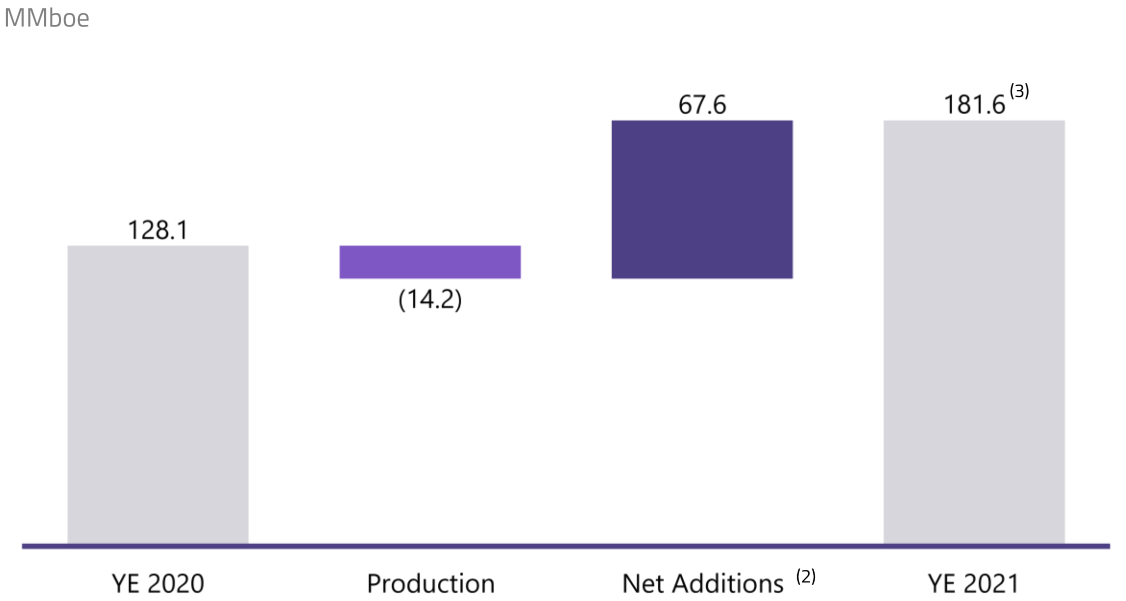
Expanded proved reserves by 42%

Solid Vaca Muerta execution driving growth

Proved reserves as of December 31, 2021 (1)



Key drivers

- Added 52 new well locations, driven by incremental activity in Bajada del Palo Oeste, resulting in a total of 134 booked locations
- 16% reduction in lifting cost extends economic limit of wells
- 31% increase in oil price assumption to 55.0 $/bbl from 42.0 $/bbl in 2020
- Shale reserves represent 85% of total proved reserves

477% Total RRR

519% Oil RRR (4)

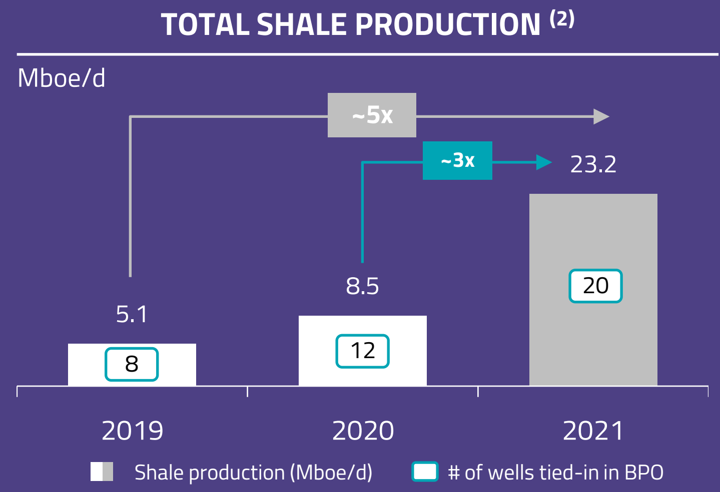
Certified present value at 10% attributable to Vista´s interest in P1 reserves of 1.5 $Bn (5)

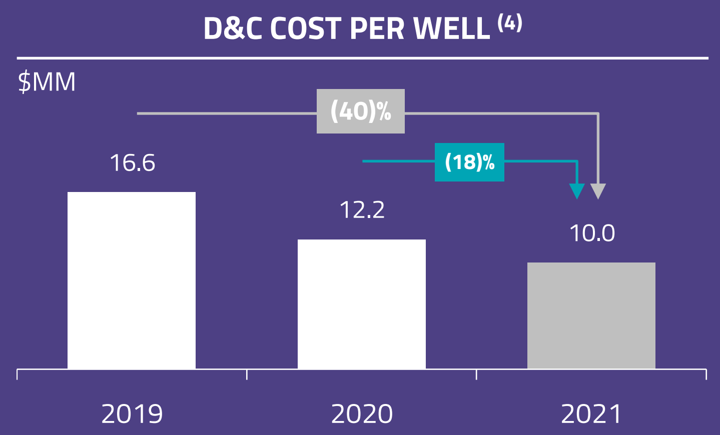
(1) 1 cubic meter of oil = 6.2898 barrels of oil; 1,000 cubic meters of gas = 6.2898 barrels of oil equivalent
(2) Net additions are calculated as the difference between: (i) YE 2021 proved reserves and; (ii) the YE 2020 proved reserves minus the 2021 total production
(3) Proved reserves were certified by DeGolyer and MacNaughton (for Argentina assets) and Netherland Sewell & Associates (for Mexico assets), under SEC methodology
(4) Includes crude oil and condensate, and NGL; NGLs represent less than 1% of total reserves
(5) Based on reserves certification reports performed by DeGolyer & McNaughton for Argentina and NSAI for Mexico, under SEC guidelines

Delivered solid operating performance

Bajada del Palo Oeste shale production exit rate of 28.1 Mboe/d [(1)]

- Tied-in 20 new wells in 2021, doubling shale oil wells on production, from 20 to 40 wells
- Oil production increased 66% y-o-y to 30.4 Mbbl/d in 2021
- Development plan executed within budget, with total Capex below 2021 guidance (324 $MM actuals v. 330 $MM guidance)
- 18% y-o-y reduction of D&C cost per well, mainly driven by:
  - ✓ 27% reduction in drilling days per well
  - ✓ Increase in completion efficiency to 8.2 stages per day
  - ✓ Reduction in drilling and completion service rates
  - ✓ Reduction in water and proppant purchase costs
  - ✓ Optimization of completion fluids
- Average well 6% above Vista type curve for the first 180 days, and 9% above Vista type curve for the first 360 days [(3)]
- D&C cost reduction drives development cost down to 7.3 $/boe, a cornerstone of our high return, short-cycle, growth plan [(4)]

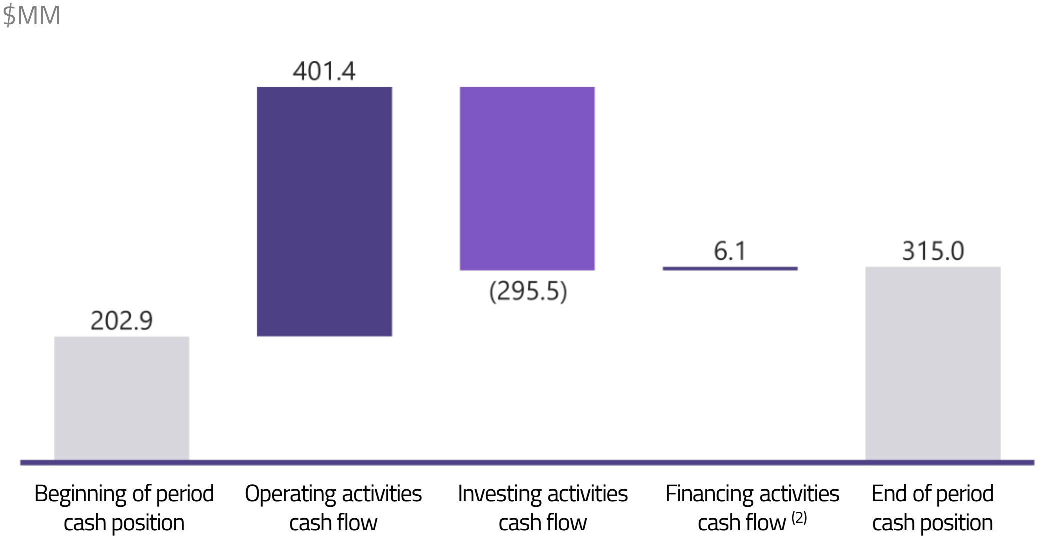




(1) Bajada del Palo Oeste shale production of 12/31/2021
(2) Bajada del Palo Oeste represented 96%, 98% and 99% of total shale production in 2019. 2020 and 2021, respectively
(3) 180 days 1-8 and 360 days 1-5
(4) Normalized to a standard well design of 2,800 meters lateral length and 47 frac stages well

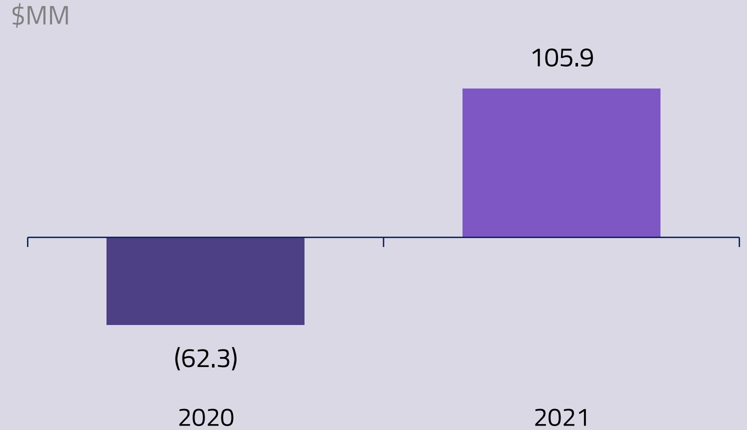
Strengthened balance sheet

FY 2021 CASH FLOW (1)

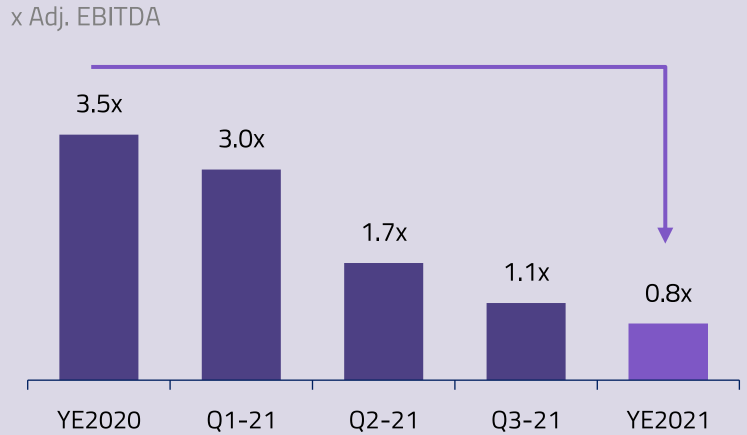


- Strong cash flow generated by operations, which increased ~4x y-o-y
- Cash flow from investing activities in 2021 was 295.5 $MM, ~ 2x compared to 2020, with capex activity of 324.1 $MM [4]
- Raised ~260 $MM through bond issuances in the Argentine capital markets during 2021, pre-financing 2022 maturities
- Reduced average debt cost to 5.8% at YE2021 from 6.9% at YE2020
- Net leverage ratio of 0.8x Adj. EBITDA, delivering below 2021 guidance

FREE CASH FLOW (3)



NET LEVERAGE RATIO



(1) Cash is defined as Cash and cash equivalents
(2) For the purpose of this graph, cash flow from financing activities is the sum of: (i) cash flow from financing activities for 6.5 $MM; (ii) effects of exchange rate changes on the balance of cash held in foreign currencies for (2.6) $MM; and (iii) the variation in Government bonds for 2.2 $MM
(3) Free cash flow is calculated as Operating activities cash flow plus Investing activities cash flow
(4) Excludes the additions for 30.1 $MM related to the transfer of "Exploration rights" of CS-01 since this transaction did not generate cash flows

Reinforced commitment to sustainability

Environmental

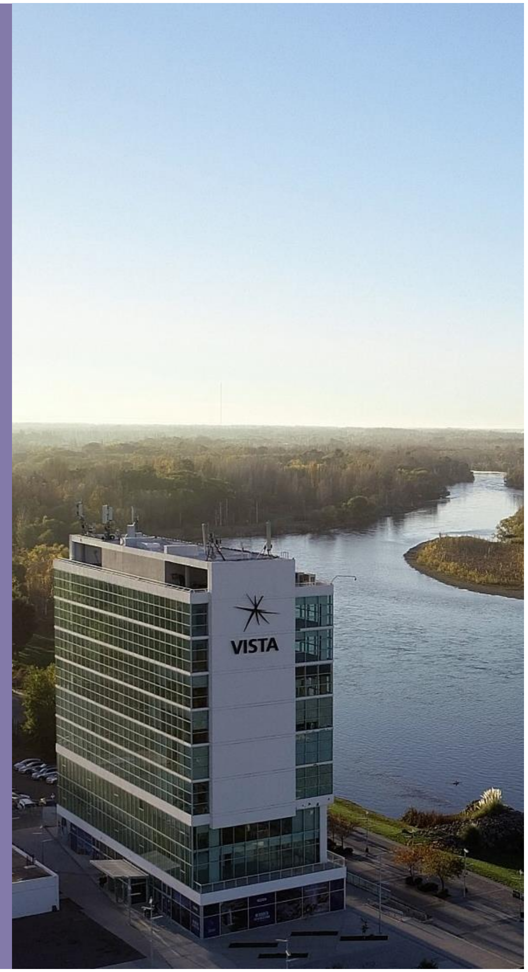
- Finished baseline study with GHG actuals for 2019 and 2020
- Ongoing implementation of selected projects prioritized by our carbon abatement cost curve
- Reduced GHG emissions by 14% y-o-y, with investment in carbon reduction projects more than offsetting impact of production increase
- Reduced GHG emissions intensity by 39% y-o-y, to 24.1 kgCo_2e/boe
- Plan in place to reduce emissions in operations by 35% thru 2026
- Kicked off projects from our own portfolio of NBS to offset remaining CO_2 emissions, with the implementation of forest and soil carbon sequestration

Social

- Recorded TRIR of 0.29, well above Tier-1 international O&G standards
- 60% of new hires were women, reflecting solid progress in diversity initiatives
- Share of local suppliers was 21% of total purchases, for a value of 78 $MM in 2021, reflecting a 56% y-o-y increase
- Continued investment in social infrastructure in Cartiel: completed first phase of 8km bicycle lane and assigned company premises for children's sports activities

Governance

- Published inaugural 2020 Sustainability report, aligned with GRI and SASB reporting standards
- Established internal carbon price of 50 $/tn CO2e in order to reflect the cost of emissions in strategic planning and capital allocation
- Strengthened governance by issuing policies related to human rights, conflict of interest, diversity, equity & inclusion and anti-corruption, and trained staff to improve awareness



Established our ambition to become net zero in 2026 (1)

(1) Scope 1 & 2 GHG emissions

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Acquisition of Aguada Federal and Bandurria Norte

Vista becomes operator and sole concession holder

DEAL BASICS

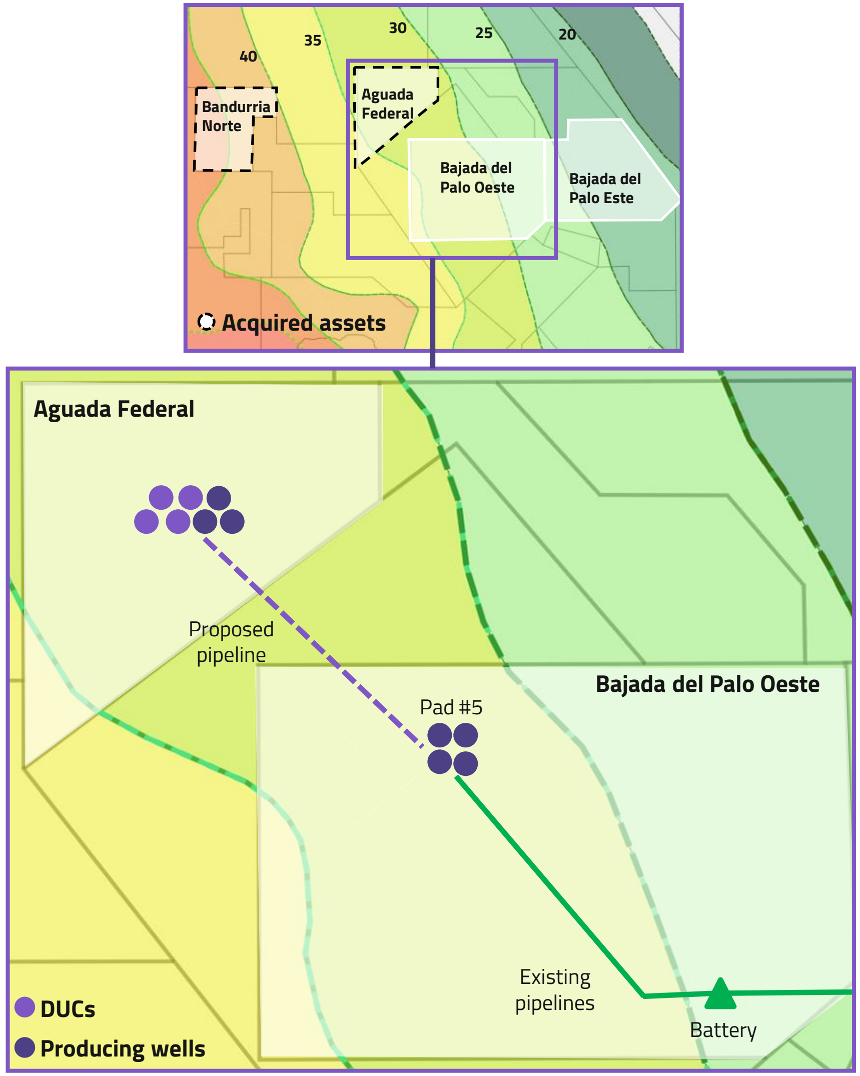
- Acquired 25,231 net acres, increasing our total acreage in Vaca Muerta to 183,084 acres
- Vista has agreed to pay a purchase price of 140 $MM:
  - ✓ 90 $MM were paid in January 2022
  - ✓ 50 $MM are payable in 8 equal quarterly installments starting Apr-22
- The transaction effectively cancels the remaining carry consideration of 77 $MM that Vista assumed when it acquired the initial 50% working interest in the blocks

STRATEGIC RATIONALE

- Purchase of core Vaca Muerta acreage at ~2,700 $/acre
- Expanded our portfolio of development wells, adding ~150 gross new well locations, for a total of up to 850 identified well locations
- Gain operatorship to enable replicating Vista business model & synergies
- 100% ownership maximizes development flexibility

NEXT STEPS

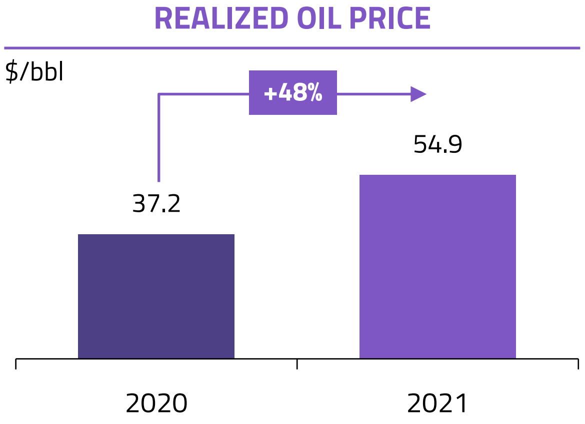
- Execute cost reduction initiatives to reduce blocks lifting cost per boe to Vista´s standards
- Build pipeline to connect Aguada Federal to Bajada del Palo Oeste
- Complete and tie-in 4 wells already drilled in Aguada Federal

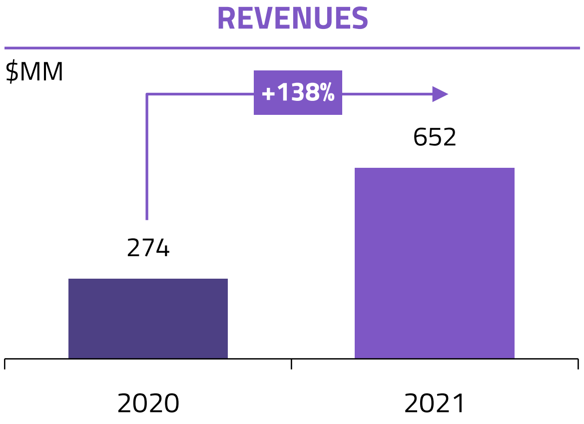


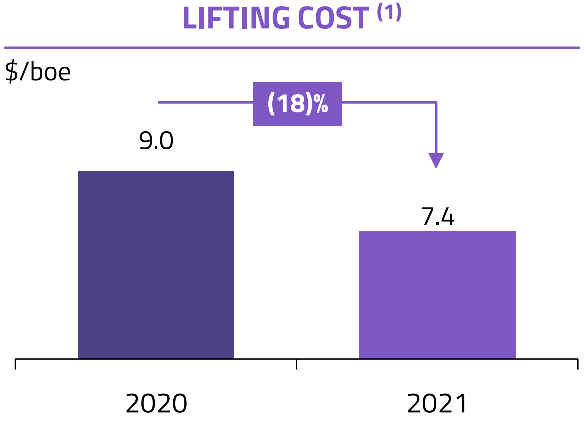
Above: project connecting Aguada Federal to Bajada del Palo Oeste

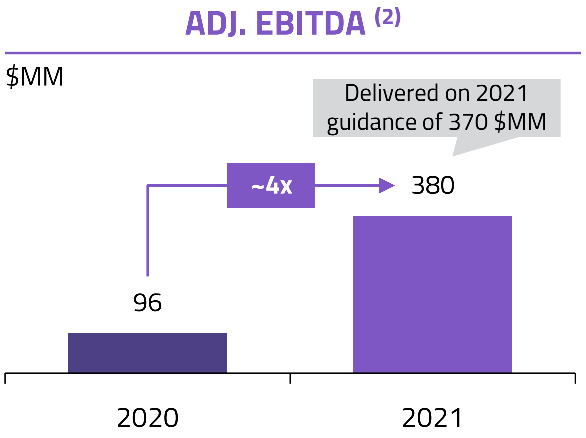
(1) 140 $MM from purchase price – 6 $MM from purchased entity consolidated cash) / 50.4k acres, implying ~2,700 $/acre

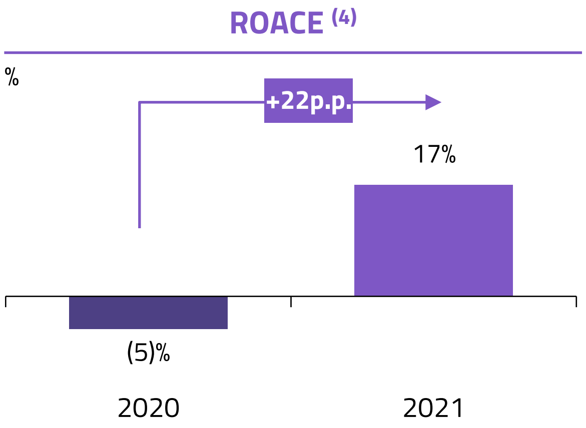
Delivered strong financial performance

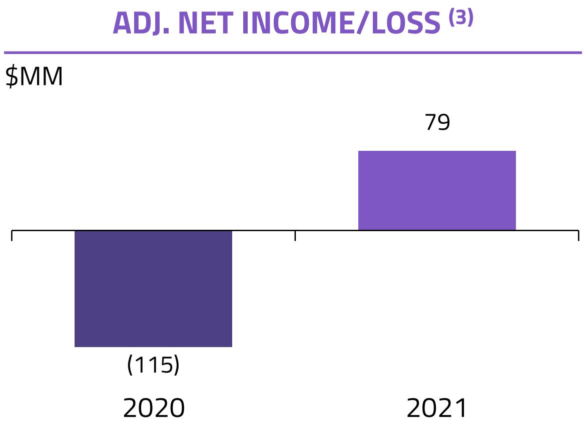












(1) Excludes the 50% non-operated interest in Aguada Federal and Bandurria Norte. Including such working interest, total lifting cost is 7.6 $/boe in 2021. Lifting cost includes production, transportation, treatment and field support services; excludes crude stock fluctuations, depreciation, royalties, direct taxes, commercial, exploration and G&A costs

(2) Adj. EBITDA = Net (loss) / profit for the period + Income tax (expense) / benefit + Financial results, net + Depreciation + Restructuring and Reorganization expenses + Impairment of long-lived assets + Other adj.

(3) Adjusted net income/loss = Net profit/loss + Deferred Income Tax + Changes in the fair value of the warrants + Impairment of long-lived assets

(4) ROACE = Operating profit (loss) / (Average total debt + Average total shareholders' equity). Total Debt = Current Borrowings + Non-current Borrowings + Current Lease liabilities + Non-current Lease liabilities

VISTA ENERGY FOR TOMORROW

2022 Guidance

	2022	Key drivers	Expected y-o-y change (4)
Shale oil wells	24 wells tied-in	16 wells in BPO, 2 wells in BPE, 2 wells in Águila Mora, 4 wells in Aguada Federal	+20%
Production	46.0 – 47.0 Mboe/d	Solid y-o-y growth every quarter; exit rate ~50 Mboe/d	+20%
Lifting cost (1)	7.5 $/boe	Replicate operating model in Aguada Federal and Bandurria Norte	(1)%
Adj. EBITDA (2)	550 - 575 $MM	Based on an average realized oil price of 60 $/bbl. A 90$ assumed average Brent for Q2 to Q4-22 adds 50 $MM to Adj. EBITDA	+48%
CAPEX	375 - 400 $MM	Increased activity in Aguada Federal	+20%
Gross debt (3)	575 $MM	Debt reduction using existing cash	(6)%

(1) Lifting cost includes production, transportation, treatment and field support services; excludes crude stock fluctuations, depreciation, royalties, direct taxes, commercial, exploration and G&A costs
(2) Adj. EBITDA = Net (loss) / profit for the period + Income tax (expense) / benefit + Financial results, net + Depreciation + Restructuring and Reorganization expenses + Impairment of long-lived assets + Other adj.
(3) Excludes accrued interest and Lease Liabilities
(4) Y-o-y change is calculated with the average of the corresponding guidance range

VISTA ENERGY FOR TOMORROW

Closing remarks

Solid operating performance, delivering on activity, production, lifting cost and Adjusted EBITDA 2021 guidance

Delivered strong financial performance and total shareholder return, with ROACE at 17% and Adjusted net income at 79 $MM

Expanded proved reserves by 42%, on the back strong performance in Bajada del Palo Oeste. Added 300 new well locations to our inventory

Reinforced commitment to sustainability, by establishing our aspiration to become net zero in scope 1 and 2 GHG emissions in 2026

Re-financed maturities, reducing average cost of debt. Reduced net leverage ratio to 0.8x, strengthening our balance sheet

Set ambitious targets for 2022. We expect to continue delivering solid improvements in all key operational and financial metrics

2021 was a turning point for our company, initiating a clear path of strong total shareholder return

We plan to submit for shareholder approval a ~20 $MM share buyback program in our next general shareholders meeting


VISTA
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THANKS!
Q&A