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Presentation on acquisition of Arcadium Lithium

9 October 2024

Attached is the presentation for the conference call for investors and analysts in relation to Rio Tinto's proposed acquisition of Arcadium Lithium plc (NYSE: ALTM) (ASX: LTM). The conference call is to be held at 7:30 PM AEDT / 9:30 AM BST on 9 October 2024.

Participants can access the live webcast at <https://edge.media-server.com/mmc/p/rzeiv2dj> or conference call at <https://register.vevent.com/register/Blc28a9d251f054b4fbd6c5685102bf8d6>

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This announcement contains inside information.

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This announcement is authorised for release to the market by Andy Hodges, Rio Tinto's Group Company Secretary.

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RioTinto

Acquisition of Arcadium Lithium

Creating a world-class lithium business

9 October 2024

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Cautionary statements

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The proxy statement will contain the full terms and conditions of the transaction, including details with respect to the Arcadium Lithium shareholder vote in respect of the transaction and will be sent or otherwise disseminated to Arcadium Lithium's shareholders and will contain important information about the proposed transaction and related matters. Any decision in respect of, or other response to, the transaction should be made only on the basis of the information contained in the proxy statement.

SHAREHOLDERS OF ARCADMIUM LITHIUM ARE ADVISED TO READ THE PROXY STATEMENT AND OTHER RELEVANT DOCUMENTS FILED WITH THE SEC WHEN THEY BECOME AVAILABLE, BECAUSE THEY WILL CONTAIN IMPORTANT INFORMATION ABOUT THE PROPOSED TRANSACTION.

The proxy statement and other relevant documents may be obtained, free of charge, on the SEC's website (<http://www.sec.gov>), when available. Arcadium Lithium's shareholders may obtain free copies of the proxy statement once it is available from Arcadium Lithium by going to Arcadium Lithium's website at <https://arcadiumlithium.com>.

Participants in the Solicitation

Rio Tinto, Arcadium Lithium and certain of their respective directors and officers may be deemed participants in the solicitation of proxies of Arcadium Lithium's shareholders in connection with the proposed transaction. Additional information regarding the foregoing persons, including their direct and indirect interests, by security holdings or otherwise, will be set forth in the proxy statement and other relevant documents to be filed with the SEC. Arcadium Lithium's shareholders and other interested persons may obtain, without charge, more detailed information regarding the directors and officers of Arcadium Lithium in

Arcadium Lithium's Annual Report on Form 10-K/A for the fiscal year ended December 31, 2023, which was filed with the SEC on April 29, 2024, and regarding the directors and officers of Rio Tinto in Rio Tinto's Annual Report on Form 20-F, for the fiscal year ended December 31, 2023, which was filed with the SEC on February 23, 2024.

Forward-looking statements

This presentation (including information incorporated by reference in this presentation), oral statements made regarding the Transaction, and other information published by Arcadium Lithium, Rio Tinto or any member of the Rio Tinto Group contain statements which are, or may be deemed to be, "forward looking statements" within the meaning of Section 27A of the Securities Act and Section 21E of the US Securities Exchange Act of 1934. Such forward looking statements are prospective in nature and are not based on historical facts, but rather on current expectations and on numerous assumptions regarding the business strategies and the environment in which Rio Tinto, any member of the Rio Tinto Group or the enlarged group following the Transaction ("Enlarged Group") shall operate in the future and are subject to risks and uncertainties that could cause actual results to differ materially from those expressed or implied by those statements. The forward looking statements contained in this presentation relate to Rio Tinto, any member of the Rio Tinto Group or the Enlarged Group's future prospects, developments and business strategies, the expected timing and scope of the Transaction and other statements other than historical facts. In some cases, these forward looking statements can be identified by the use of forward looking terminology, including the terms "believes", "estimates", "will look to", "shall look to", "would look to", "plans", "prepares", "anticipates", "expects", "is expected to", "is subject to", "budget", "scheduled", "forecasts", "synergy", "strategy", "goal", "cost-saving", "projects" "intends", "may", "will", "shall", or "should" or their negatives or other variations or comparable terminology. Forward-looking statements may include statements relating to the following: (i) future capital expenditures, expenses, revenues, earnings, synergies, economic performance, indebtedness, financial condition, dividend policy, losses and future prospects; (ii) business and management strategies and the expansion and growth of Rio Tinto's, any member of the Rio Tinto Group or Arcadium Lithium's operations and potential synergies resulting from the Transaction; and (iii) the effects of global economic

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Specifically, statements of estimated cost savings and synergies relate to future actions and circumstances which, by their nature involve, risks, uncertainties and contingencies. As a result, the cost savings and synergies referred to may not be achieved, may be achieved later or sooner than estimated, or those achieved could be materially different from those estimated. Due to the scale of the Enlarged Group, there may be additional changes to the Enlarged Group's operations. As a result, and given the fact that the changes relate to the future, the resulting cost synergies may be materially greater or less than those estimated.

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Arcadium Lithium, the Rio Tinto Group and Rio Tinto expressly

disclaim any obligation to update such statements other than as required by law or by the rules of any competent regulatory authority, whether as a result of new information, future events or otherwise.

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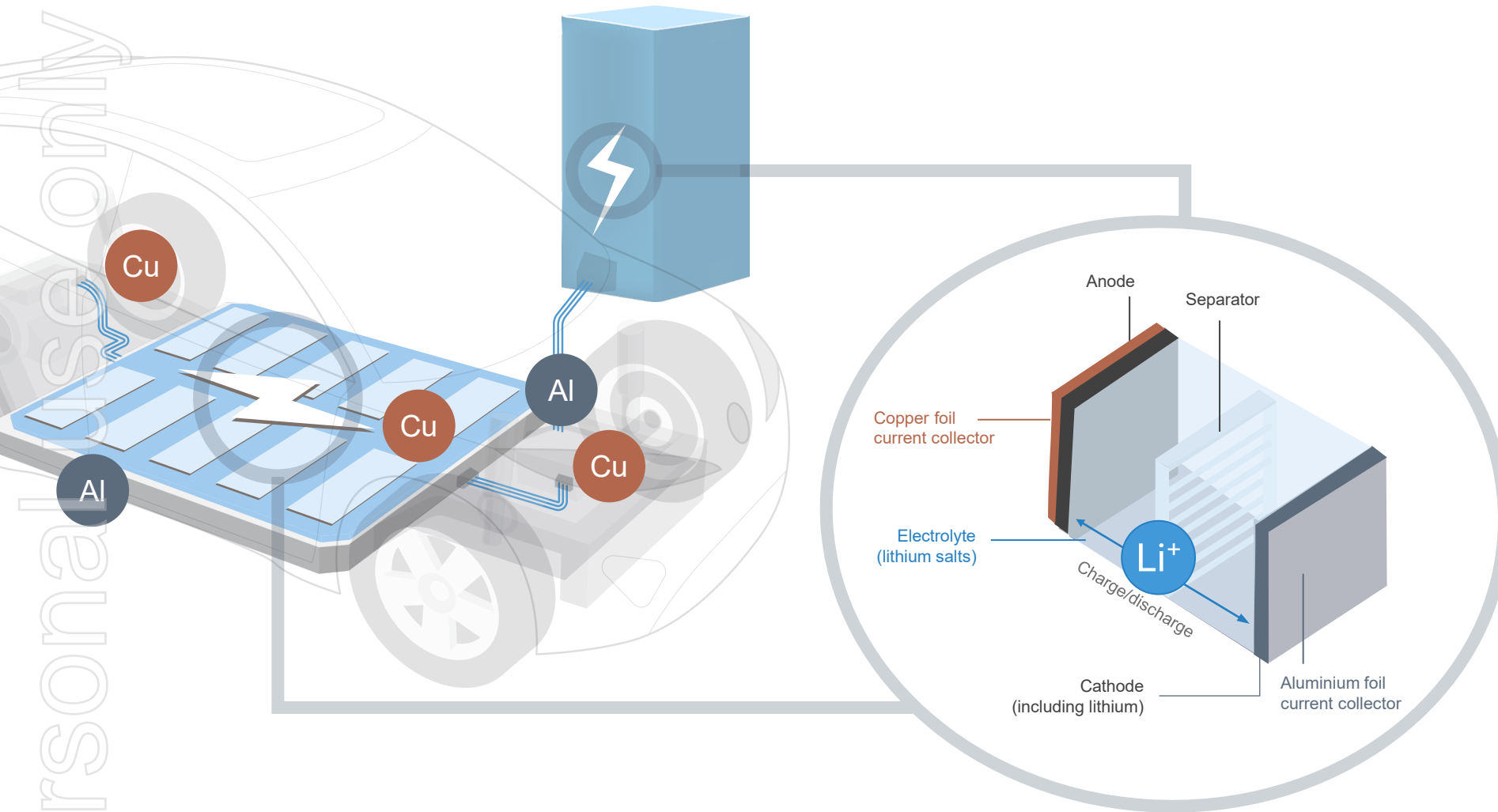
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Lithium – an essential material for the energy transition

Lithium batteries harness the properties of critical materials for Electric Vehicles (EVs) and energy storage



Al
Aluminium

Aluminium
• ~230kg per EV

Cu
Copper

Copper
• ~80kg per EV

Li⁺
Lithium

Lithium is **integral** to batteries now and for the long term

Lithium
• Up to 85kg LCE¹ per EV
• >80% of production used in EVs and energy storage

Lithium – right product, right time

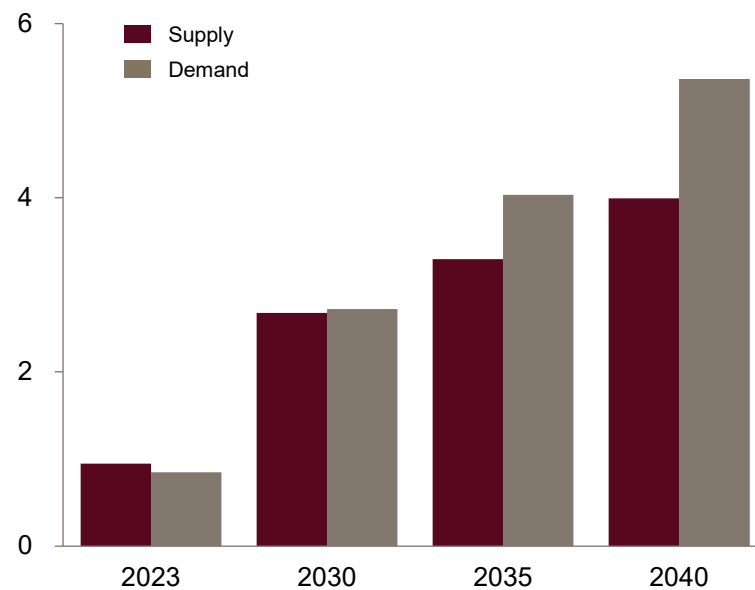
One of the cornerstone materials for the energy transition

Product High growth market
High quality customer offering
Complements our portfolio of products and customers

Timing Countercyclical, lithium price down 80% from highs
>10% CAGR for demand to 2040

Highly attractive long-term fundamentals

Supply deficit from late 2020's (kt LCE)¹



Olaroz
Jujuy, Argentina

¹ Benchmark Mineral Intelligence (BMI) supply and demand forecast as of September 2024

Bringing Rio Tinto's scale, development capabilities and financial strength to the Arcadium portfolio

Tier 1 assets

- Long mine lives
- ~130% capacity¹ growth through 2028 focused in Rio Tinto's existing geographies

Complementary capabilities

- Rio Tinto's balance sheet strength to accelerate growth pipeline
- Proven DLE² technology
- Project delivery and operatorship

Compelling economics

- Low cost, large, expandable
- High quality product to premium customers
- Maintaining our balance sheet strength in line with our single A rating target



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Arcadium Lithium: the premier lithium growth business¹

Established vertically integrated producer²

4

Lithium brine assets

5

Lithium hydroxide facilities

3

Lithium specialties facilities

3

Hard-rock spodumene assets

Tier 1 assets with high grades and long mine lives

#1

Resource base

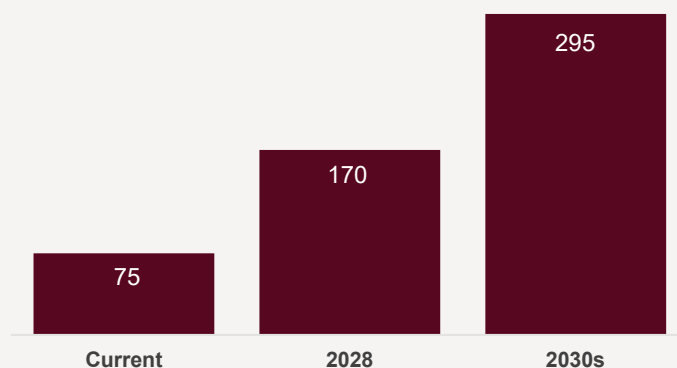
Proven success in resource expansion

Leader in long-term lithium production potential

Highly attractive portfolio of growth projects

Significant capital investment made

Consolidated nameplate capacity (kt LCE)³



High-margin assets even at the bottom of the cycle

40%

H1 2024 adjusted EBITDA margin

Low costs underpinned by high-grade resources and best-in-class DLE⁴ technology

Investing in innovation and next generation technology

Enhancing lithium processing capabilities

ILiAD Technologies

- A market leader in DLE production processes
- Potential improvement in efficiency, sustainability and costs

Lithium Metal Assets

- Targeting safer, lower cost and more sustainable production
- Added flexibility using lithium carbonate feedstock
- Meeting long term demand potential for IRA¹ compliant lithium metal

Developing next generation battery applications

LIOVIX®

- Important technology for the development and commercialisation of lithium metal anodes and future solid-state batteries
- Improving battery life and manufacturing cost
- Enhancing safety and sustainability



LIOVIX® Roll-to-Roll Coater
Bessemer City

Multi-year commercial relationships with global leaders

Panasonic
ENERGY



Ford

+ SES



LYTEN

BMW
Group

BTR



Multi-generational asset base with significant production upside

Industry-leading resource endowment...

... underpinning a global lithium business of scale

#1 Resource base¹



arcadium lithium

9Mt LCE Reserves
37Mt LCE Resources

+

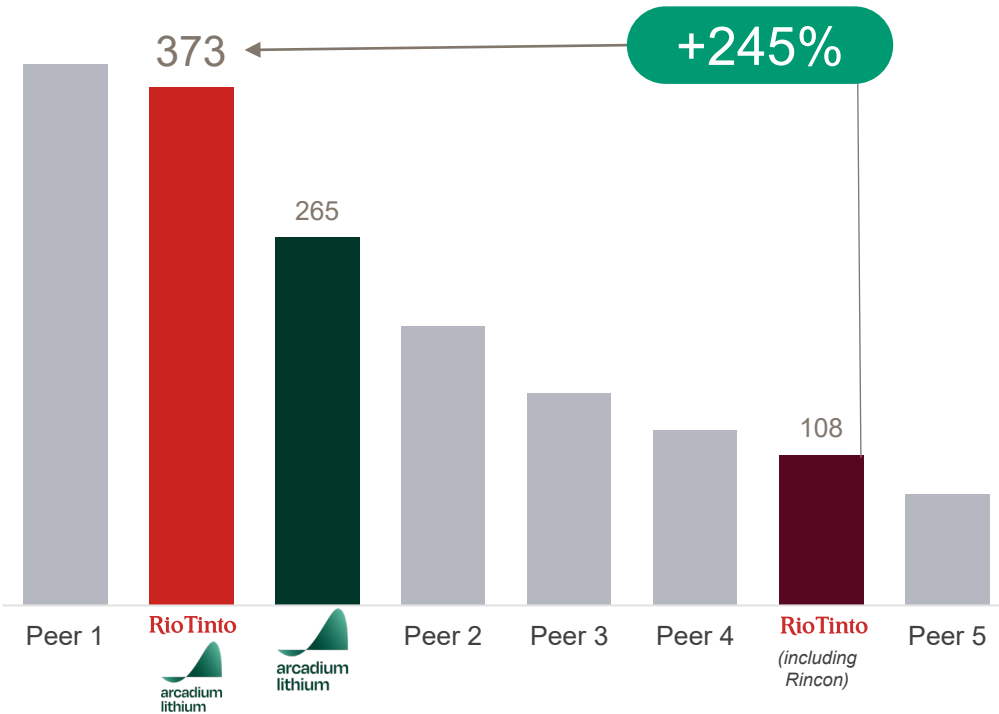
RioTinto

(excluding Rincon)

6Mt LCE Resources



Targeted lithium capacity² (ktpa LCE, attributable)



- Large-scale and high-grade assets with expansion potential
- Proven success in resource expansion

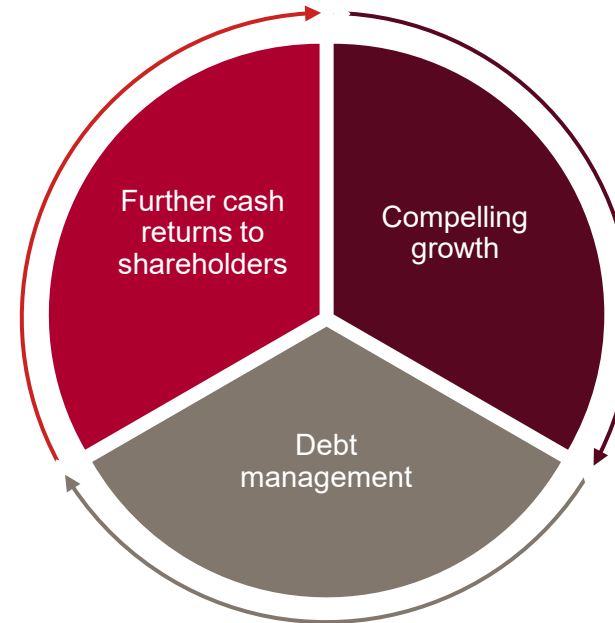
¹ Mineral Reserves and Mineral Resources (exclusive of Mineral Reserves) shown on an attributable basis. See slide 17 for the supporting material in relation to these Mineral Reserves and Mineral Resources estimates, including for the basis of conversion to Lithium Carbonate Equivalent (LCE). Sociedad Química y Minera (SQM) considered pro forma for the SQM / Codelco partnership.
² Peers include Albemarle Corporation, SQM, Pilbara Minerals Limited, Mineral Resources Limited and Lithium Americas Corporation. Peers shown pro forma for SQM / Codelco partnership and Pilbara Minerals / Latin Resources announced transactions. See slide 17 for the sources of information applied in developing peer comparison data.

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Maintaining our disciplined approach to capital allocation

Shareholder returns of 40-60% of underlying earnings on average through the cycle

- 01** Essential capex
- 02** Ordinary dividends
- 03** Iterative cycle of...



Arcadium Lithium's capital requirements represent ~5% of our group capital expenditure¹

The transaction

Consideration

- US\$5.85/sh in cash, total US\$6.7 billion¹ cash transaction
- Unanimously approved by Boards of Rio Tinto and Arcadium Lithium

Timing

- Jersey scheme of arrangement
- Customary approvals and closing conditions
- Mid-2025 target completion

**Rio Tinto's capital allows
for acceleration of project delivery**



Creating the world-leading lithium business




- #1 lithium resource base
- Compelling growth pipeline
- Enhanced technological and ESG leadership
- Diversified by geography and feedstock
- Presence across the value chain
- Established portfolio of premier customers



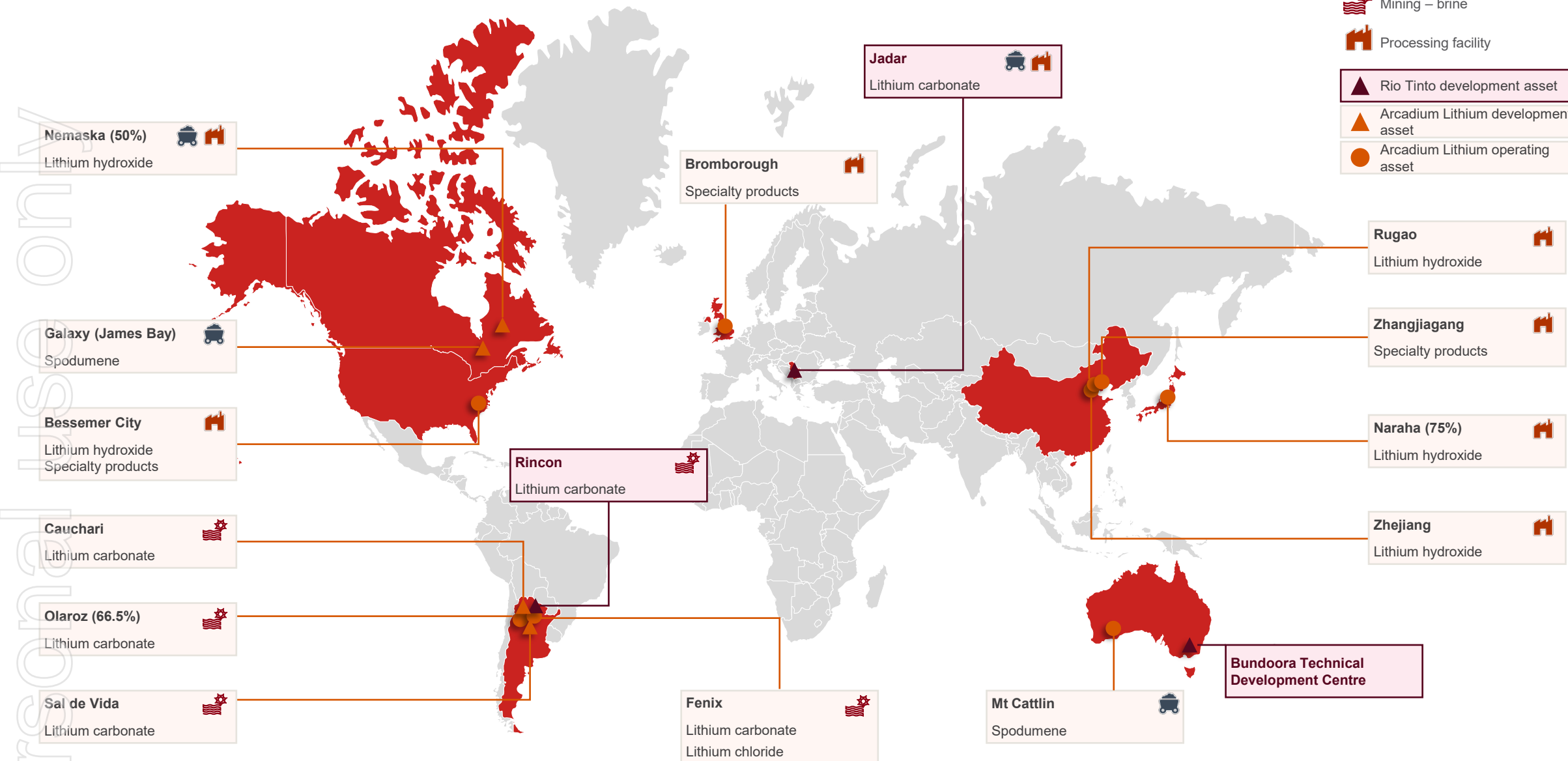
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Appendices

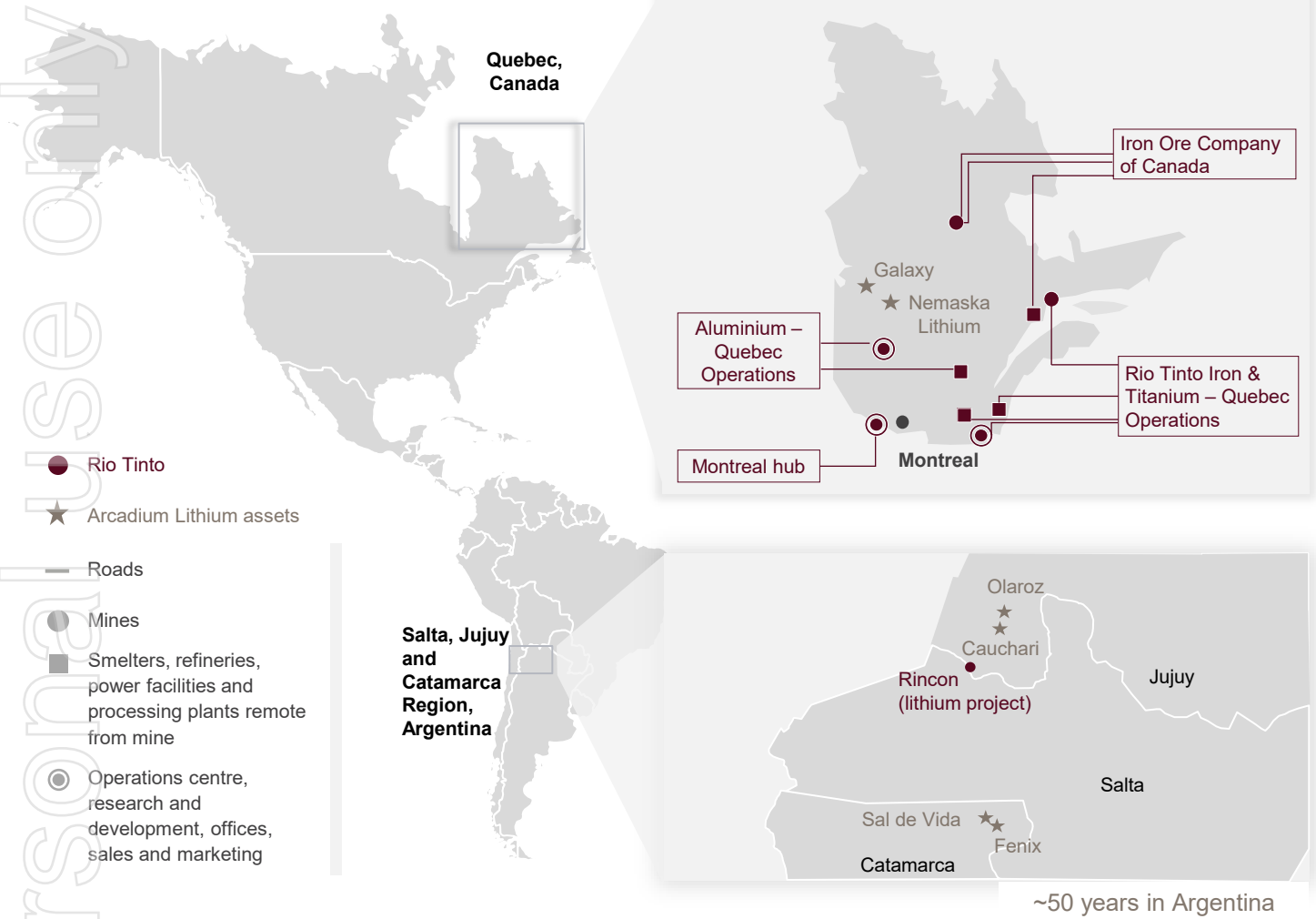
A truly global and integrated asset footprint¹

-  Mining – hard-rock
-  Mining – brine
-  Processing facility

-  Rio Tinto development asset
-  Arcadium Lithium development asset
-  Arcadium Lithium operating asset



Complementary portfolios: Rio Tinto has an existing footprint and deep experience in Canada and Argentina



~100 years in Quebec

Canada

- Long history of hard-rock development
- Constructive relationships with Cree nation
- Supply relationships to streamline construction
- Utilise existing logistics corridors

Clear opportunity for economies of scale and regional approach

- Accelerate project development
- Aim to be the employer of choice in both locations

Argentina

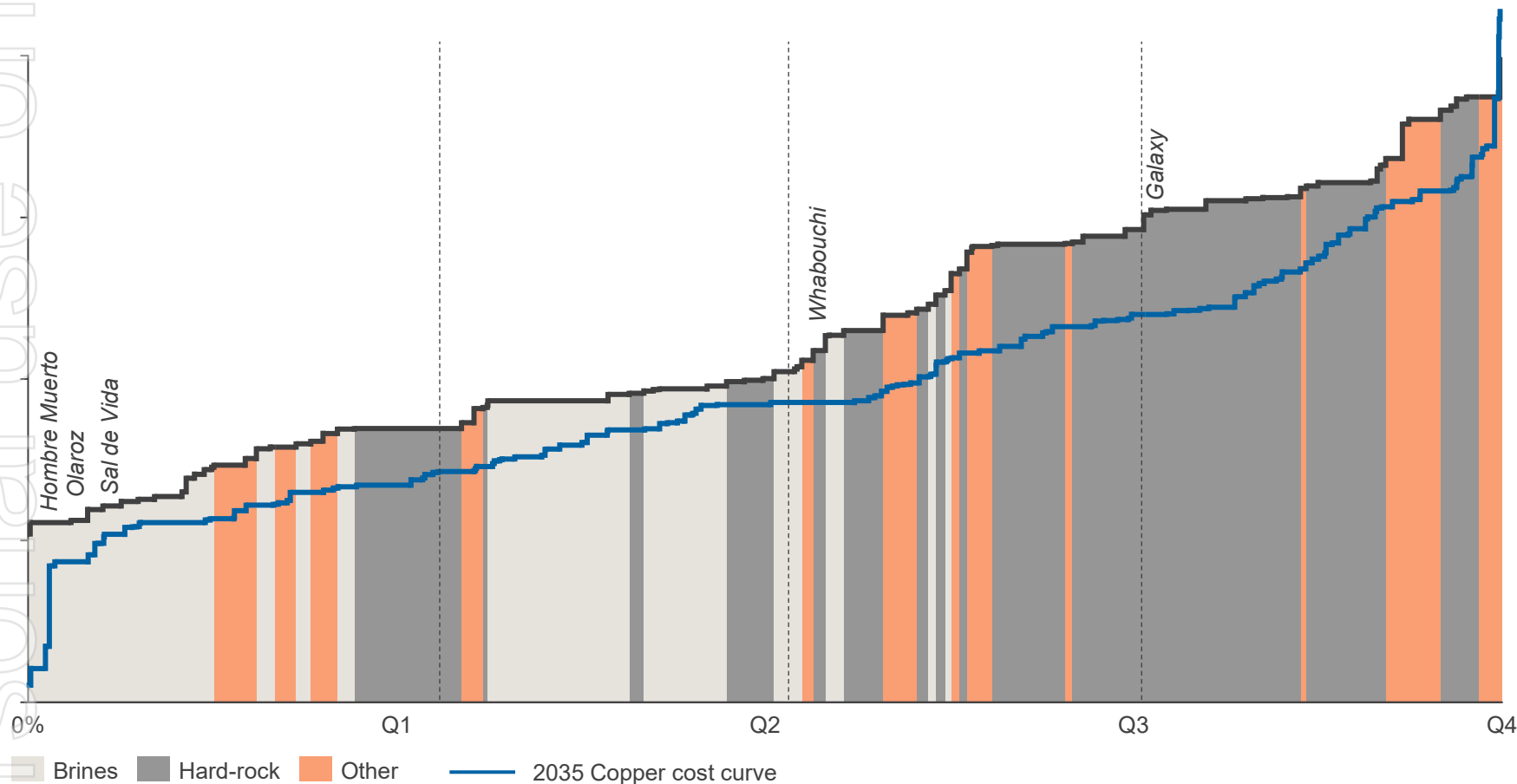
- Capitalise on DLE capability convergence
- Optimise supply chain and logistics for key raw materials
- Improving investment environment supported by RIGI policies¹

~50 years in Argentina

¹ Regulation of the Incentive Regime for Large Investments ("RIGI") promotes investment in projects that qualify as large long-term investments in Argentina and pertain to activities within certain sectors, by granting a series of tax, customs, and exchange incentives, as well as an efficient system for the protection of rights and dispute resolution.

Arcadium Lithium's assets are well positioned on the cost curve

2035 lithium and copper cost curve¹



Lithium cost curve steepness comparable to copper (ratio of 90th percentile to 25th percentile)

Arcadium Lithium's brine and integrated hard-rock assets well positioned on cost curve, generating high profitability through the cycle

Galaxy high quality spodumene mine expected to be highly profitable². Position on cost curve reflective of third-party processing costs, in addition to mining costs

Supporting statements

Arcadium Lithium Mineral Resources and Mineral Reserves

Arcadium Lithium's lithium Mineral Resources referenced on slide 9 are a Lithium Carbonate Equivalent (LCE) estimate based on:

- the 85.9 Mt of hard-rock lithium Mineral Resources as reported in Arcadium Lithium's Form 10-K annual report filed with the US Securities Exchange Commission (SEC) for the year ended 31 December 2023 (Arcadium Lithium's 2023 Form 10-K), which comprise 0.1 Mt of Measured Resources at 1.00% Li₂O, 25.2 Mt of Indicated Resources at 1.23% Li₂O and 60.6 Mt of Inferred Resources at 1.30% Li₂O; and
- the 6.4 Mt of lithium brine Mineral Resources (expressed as lithium metal) as reported in Arcadium Lithium's 2023 Form 10-K annual report, which comprise 2.8 Mt of Measured Resources at 581 mg/L, 1.2 Mt of Indicated Resources at 494 mg/L and 2.4 Mt of Inferred Resources at 473 mg/L.

Arcadium Lithium's lithium Mineral Reserves referenced on slide 9 are an LCE estimate based on:

- the 62.1 Mt of hard-rock lithium Mineral Reserves at 1.28% Li₂O as reported in Arcadium Lithium's 2023 Form 10-K, which comprise 5.4 Mt of Proven Reserves at 1.38% Li₂O and 56.7 Mt of Probable Reserves at 1.27% Li₂O; and
- the 1.4 Mt of lithium brine Mineral Reserves at 658 mg/L (expressed as lithium metal) as reported in Arcadium Lithium's 2023 Form 10-K annual report, which comprise 0.3 Mt of Proven Reserves at 722 mg/L and 1.1 Mt of Probable Reserves at 641 mg/L.

These Mineral Resource and Mineral Reserve estimates have been prepared in accordance with the requirements of subpart 1300 of Regulation S-K ("Subpart 1300"), issued by the SEC. The terms "Mineral Resource," "Measured Mineral Resource," "Indicated Mineral Resource," "Inferred Mineral Resource," "Mineral Reserve," "Proven Mineral Reserve" and "Probable Mineral Reserve" are defined and used in accordance with subpart 1300. Under Subpart 1300, Mineral Resources may not be classified as "Mineral Reserves" unless the determination has been made by a qualified person, as defined in Subpart 1300, that the mineral resources can be the basis of an economically viable project.

Brine deposits are fluid and move across resource intervals in response to pumping, infiltration and other environmental factors. Additionally, Probable Mineral Reserves often include production

from both Measured and Indicated Resource intervals, making a direct comparison between Mineral Resources at a static point in time and Mineral Reserves, which are dynamic and occur over several decades, challenging.

In reporting Arcadium Lithium's hard-rock lithium Mineral Resources and Mineral Reserves as LCE, Li₂O is converted to LCE by multiplying by 2.473. In reporting Arcadium Lithium's lithium brine Mineral Resources and Mineral Reserves as LCE, lithium metal is converted to LCE by multiplying by a factor of 5.323.

Mineral Resources are reported exclusive of Mineral Reserves.

Mineral Reserves as reported under Regulation S-K are the equivalent of Ore Reserves under the the Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves, 2012 edition (JORC Code).

Jadar Mineral Resources

Rio Tinto's lithium Mineral Resources referenced on slide 9 are an LCE estimate based on the 144 Mt of Mineral Resources at 1.80% Li₂O at Rio Tinto's Jadar project in Serbia as reported in Rio Tinto's 2023 Annual Report released to the Australian Securities Exchange (ASX) on 21 February 2024 and available at riotinto.com. The Jadar Mineral Resources comprise 85 Mt of Indicated Resources at 1.76% Li₂O and 58 Mt of Inferred Resources at 1.87% Li₂O. The Competent Persons responsible for the information in the 2023 Annual Report that relates to the Jadar project's Mineral Resources are I Misailovic and D Tanaskovic, both of whom are members of the European Federation of Geologists. These Mineral Resources have been reported in accordance with the JORC Code and the Listing Rules of the ASX. Rio Tinto confirms that it is not aware of any new information or data that materially affects the Jadar Mineral Resources estimate reported in the 2023 Annual Report, that all material assumptions and technical parameters underpinning the estimate continue to apply and have not materially changed, and that the form and context in which the Competent Persons' findings are presented have not been materially modified.

In reporting the Jadar Mineral Resource as LCE, Li₂O is converted to LCE by multiplying by 2.473.

Peer targeted lithium nameplate capacity comparison data on slide 9

Nameplate capacity data for Albemarle Corporation reflects: Greenbushes stated capacity from its Form 8-K dated 15 February 2023 across TGP, CGP1, CGP2, CGP3, CGP4, and TRP, on a 100% basis, of 2,585ktpa of spodumene concentrate. Spodumene grade is stated as 6.0% Li₂O. Conversion to LCE equivalent basis assumes a conversion factor of 2.473:1 LCE:Li₂O. Albemarle owns 49% of Greenbushes. Wodgina stated capacity from Mineral Resources' FY24 Half Year Results Presentation dated 21 February 2024, on a 100% basis, of 900ktpa of spodumene concentrate. Spodumene grade is stated as 5.5% Li₂O. Conversion to LCE equivalent basis assumes a conversion factor of 2.473:1 LCE:Li₂O. Albemarle owns 50% of Wodgina. Atacama stated capacity from its Form 8-K dated 15 February 2023 of 84ktpa LCE. Silver Peak stated capacity from its Pre-Feasibility Study dated 14 February 2023 of 6ktpa LCE. Kings Mountain stated capacity from its presentation titled "Albemarle Kings Mountain – The Element" dated 01 September 2023 of 50ktpa LCE.

Nameplate capacity data for Arcadium Lithium reflects: Cauchari stated capacity from its Investor Day Presentation dated 19 September 2023 of 25ktpa LCE. Hombre Muerto stated capacity from its Investor Day Presentation dated 19 September 2023 of 67ktpa LCE. Olaroz stated capacity from its Investor Day Presentation dated 19 September 2023 of 43ktpa LCE, on a 100% basis. Arcadium Lithium owns 66.5% of Olaroz. Sal de Vida stated capacity from its Investor Day Presentation dated 19 September 2023 of 45ktpa LCE. Whabouchi stated capacity from its Investor Day Presentation dated 19 September 2023 of 30 ktpa LCE, on a 100% basis. Arcadium Lithium owns 50% of Whabouchi. James Bay stated capacity from its Investor Day Presentation dated 19 September 2023 of 80ktpa LCE. Guermes stated capacity from its Investor Day Presentation dated 19 September 2023 of 4ktpa LCE.

Nameplate capacity data for Pilbara Minerals Limited reflects: Pilgangoora stated capacity from its presentation titled "Pilbara Minerals to acquire Latin Resources" dated 15 August 2024 of 1,060ktpa of spodumene concentrate. Spodumene grade is stated as 5.2% Li₂O. Conversion to LCE equivalent basis assumes a conversion factor of 2.473:1 LCE:Li₂O. Salinas stated capacity from its presentation titled "Pilbara Minerals to acquire Latin Resources" dated 15 August 2024 of 499ktpa of spodumene

concentrate. Spodumene grade is stated as 5.2% Li₂O. Conversion to LCE equivalent basis assumes a conversion factor of 2.473:1 LCE:Li₂O.

Nameplate capacity data for Sociedad Química y Minera reflects: Salar de Atacama stated capacity from its August 2024 Corporate Presentation dated 20 August 2024 of 240ktpa of LCE, and 100ktpa of LiOH, on a 100% basis. Conversion to LCE equivalent basis assumes a conversion factor of 0.648 LCE:LiOH. Figure shown pro-forma for the Coldelco partnership signed on 31 May 2024. Mount Holland stated capacity from its August 2024 Corporate Presentation dated 20 August 2024 of 50ktpa LiOH. Conversion to LCE equivalent basis assumes a conversion factor of 0.648 LCE:LiOH. Sociedad Química y Minera owns 50% of Mount Holland via a JV.

Nameplate capacity data for Mineral Resources Limited reflects: Wodgina stated capacity from Mineral Resources' FY24 Half Year Results Presentation dated 21 February 2024, on a 100% basis, of 900ktpa of spodumene concentrate. Spodumene grade is stated as 5.5% Li₂O. Conversion to LCE equivalent basis assumes a conversion factor of 2.473:1 LCE:Li₂O. Mineral Resources owns 50% of Wodgina. Mt Marion stated capacity from Mineral Resources' FY24 Half Year Results Presentation dated 21 February 2024, on a 100% basis, of 900ktpa of spodumene concentrate. Spodumene grade is stated as 4.0% Li₂O. Conversion to LCE equivalent basis assumes a conversion factor of 2.473:1 LCE:Li₂O. Mineral Resources owns 50% of Mt Marion. Bald Hill stated capacity from Mineral Resources' FY24 Half Year Results Presentation dated 21 February 2024 of 150ktpa of spodumene concentrate. Spodumene grade is stated as 5.5% Li₂O. Conversion to LCE equivalent basis assumes a conversion factor of 2.473:1 LCE:Li₂O.

Nameplate capacity data for Lithium Americas Corporation reflects: Thacker Pass stated capacity from its May 2024 Corporate Presentation dated 28 May 2024 of 80ktpa LCE.

Nameplate capacity data for Rio Tinto reflects 58ktpa LCE for Jadar as disclosed in the release to the ASX on 23 February 2022 titled "Rio Tinto updates Ore Reserves and Mineral Resources at Jadar", and a potential future nameplate capacity of 50ktpa LCE for Rio Tinto's Rincon project in Argentina.

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