



DRONE SOLUTIONS LEADER

ENTERPRISE & GOVERNMENT

Corporate Presentation
February 2026



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These forward-looking statements are subject to certain risks and uncertainties that could cause actual results to differ materially from our historical experience and our present expectations or projections, including, without limitation: the Company’s history of losses; our ability to achieve or maintain profitability in the future; our limited operating history after our recent business combination with XTI Aircraft Company; our ability to meet the development and commercialization schedule with respect to the TriFan 600; the risk that we have not yet manufactured any non-prototype aircraft or delivered any aircraft manufactured by us to a customer, and that we and our current and future collaborators may be unable to successfully develop and market our aircraft or solutions, or may experience significant delays in doing so; the risk that we may not realize the expected benefits of the Drone Nerds acquisition; unexpected costs, charges or expenses resulting from the Drone Nerds acquisition or any future acquisition or difficulties in integrating and operating acquired companies; supplier concentration and regulatory actions affecting key suppliers; changes in applicable laws or regulations; evolving market demand; the uncertainties associated with obtaining regulatory approvals of our aircraft including certification by the Federal Aviation Administration, which is a lengthy and costly process; our ability to obtain adequate financing in the future as needed; the risk that our conditional pre-orders for our aircraft (which include conditional aircraft purchase agreements, non-binding reservations, and options) are canceled, modified, delayed or not placed and that we must return refundable deposits; emerging competition and rapidly advancing technology that may outpace our technology; customer demand for the products and services we develop; the impact of competitive or alternative products, technologies and pricing; our ability to develop other new products and technologies; our ability to navigate the regulatory environment and complexities with compliance related to such environment; our ability to attract customers and/or fulfill customer orders; our ability to enhance and maintain the reputation of our brand and expand our customer base; our ability to scale in a cost-effective manner and maintain and expand our manufacturing and supply chain relationships; general economic conditions and events and the impact they may have on us and our potential customers, including, but not limited to escalating tariff and non-tariff trade measures imposed by the U.S. and other countries, increases in inflation rates and rates of interest and supply chain challenges; cybersecurity attacks; our ability to maintain compliance with the continued listing requirements of the Nasdaq Capital Market; lawsuits and other claims by third parties or investigations by various regulatory agencies that we may be subjected to and are required to report; our ability to respond to a failure of our systems and technology to operate our business; our ability to protect our intellectual property; the outcome of any known and unknown litigation and regulatory proceedings; our success at managing the risks involved in the foregoing items; and other risks and uncertainties described in our public filings with the SEC, which are accessible at www.sec.gov, and which you are advised to consult.

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This presentation also contains estimates, projections and other information concerning our industry and our business, including data regarding the estimated size of our markets and their projected growth rates. Unless otherwise indicated, such estimates, projections and other information is based on information released by independent industry analysts and other third-party sources and management estimates. In some cases, we do not expressly refer to the sources from which these data are derived. Management estimates are derived from publicly available information released by independent industry analysts and other third-party sources, as well as data from our internal research, and are based on assumptions made by us upon reviewing such data, and our experience in, and knowledge of, such industry and markets, which we believe to be reasonable. In addition, projections, assumptions and estimates of the future performance of the industry in which we operate and our future performance are necessarily subject to uncertainty and risk due to a variety of factors, including those described above. These and other factors could cause results to differ materially from those expressed in the estimates made by independent parties and by us.

Experienced Management Team



Scott Pomeroy
Chairman & CEO
XTI Aerospace



Brooke Turk
Chief Financial Officer
XTI Aerospace



Tobin Arthur
Chief Strategy Officer
XTI Aerospace



Michael Tapp
Chief Operating Officer
XTI Aerospace



Jeremy Schneiderman
CEO Drone Nerds



Steve Zohrabian
Executive Vice President,
XTI Aircraft



Dr. Alex Williams
Executive Vice President, XTI
Aerospace

Transformation 2026

*Built On VTOL Expertise,
We Now Operate a Leading Drone Platform*



- Positioning between OEMs and customers provides leverage & data
- Flywheel between hardware and high-margin services revenue
- Proven **enterprise** platform positioned to consolidate and expand verticals, geographies and technologies
- Target **military** and federal government sales
- Disciplined cost structure and cash flow - covering current operating expenses

XTI
aerospace



**DRONE
NERDS**

Strategic Acquisition
Nov 2025

\$110M+
Revenue in 2024

Drone Market Landscape



COMPONENT / SUPPLY CHAIN

DRONE OEMS & MANUFACTURING

ENTERPRISE SOLUTIONS & SALES

AFTERMARKET SUPPORT

DRONENERDS
Future Opportunities

DRONENERDS
Today

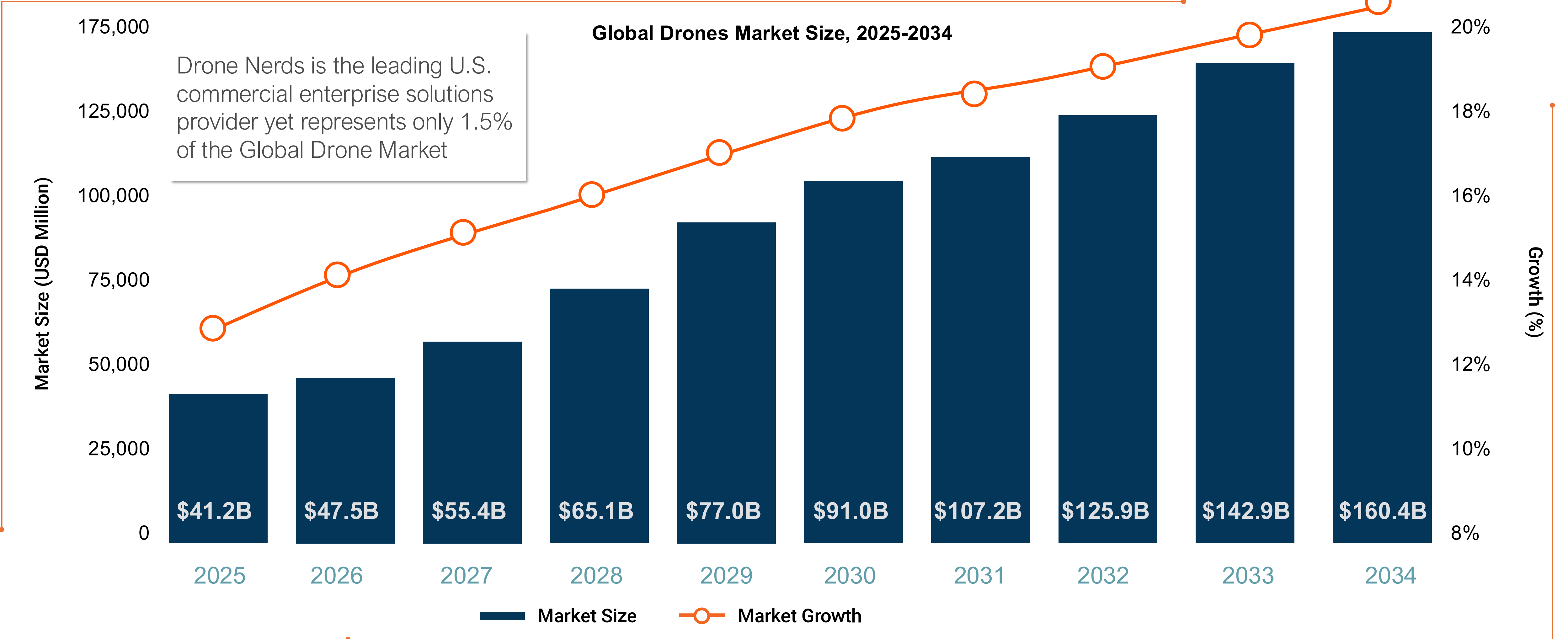
NDAA / Blue Compliant

Other U.S.-based Operations

Plus select OEM-specific
authorized repair stations

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Significant Growth Opportunity



Source: Fortune Business Insights

The Market is Ripe



Fragmented Market

Disconnected solutions

Hardware, software, training, and support are fragmented across vendors, driving cost and complexity.

Regulatory disruption

FCC actions and NDAA restrictions are rapidly removing foreign-made drone options.

Lack of enterprise-scale options

Most OEM's cannot support multi-site, regulated, mission-critical operations.

Complete Solutions Provider

End-to-end Enterprise Solutions

Covering deployment, training, fleet management, and lifecycle support.

Regulatory tailwinds favor U.S. platforms

Secure, NDAA-compliant, domestic solutions are becoming mandatory.

Platform not product

Recurring services, real-world operational data, and deep customer integration.



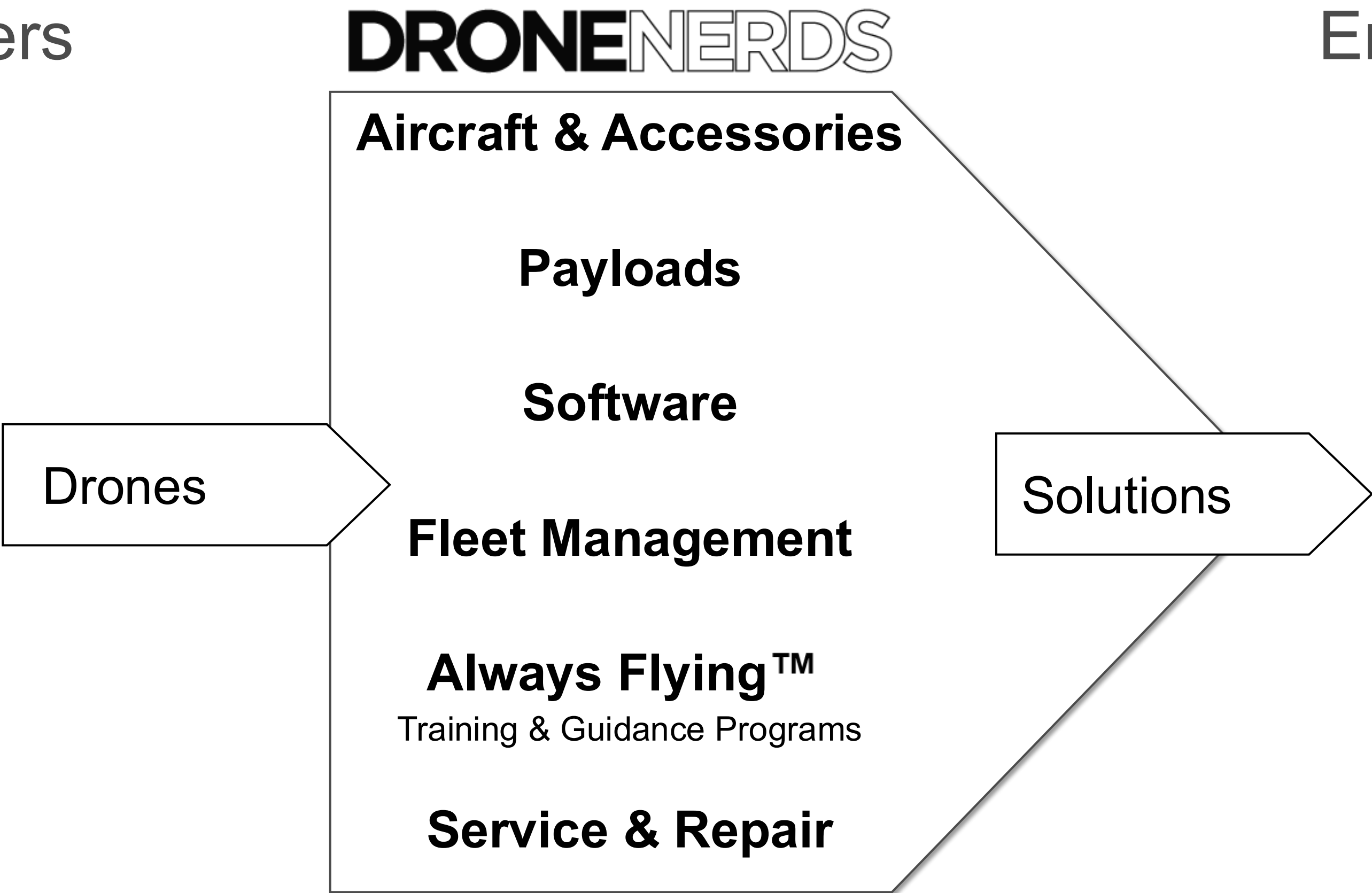
Enterprise Business Model



OEM Manufacturers



(Drone Nerds represents over 50 Hardware & Software OEMs)



Enterprise Verticals



Drone Nerds provides customer feedback to OEMs



Data & Insights Layer

Drive Product Innovation and Improvement

Customers provide product and operational feedback to Drone Nerds



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2026 Financial Highlights



FY2026 Financial Summary



Financial Summary

- 30%+ Revenue growth rate expected
- Revenue per employee > \$1.2M
- Positive monthly cash flow achieved by EOY
- Capital raise other than acquisitions not anticipated

FY26 Revenue Plan

\$160M+

Avg Monthly Burn

(\$3.8M) to +\$1.9M

FY26 EOY Cash

> \$16M

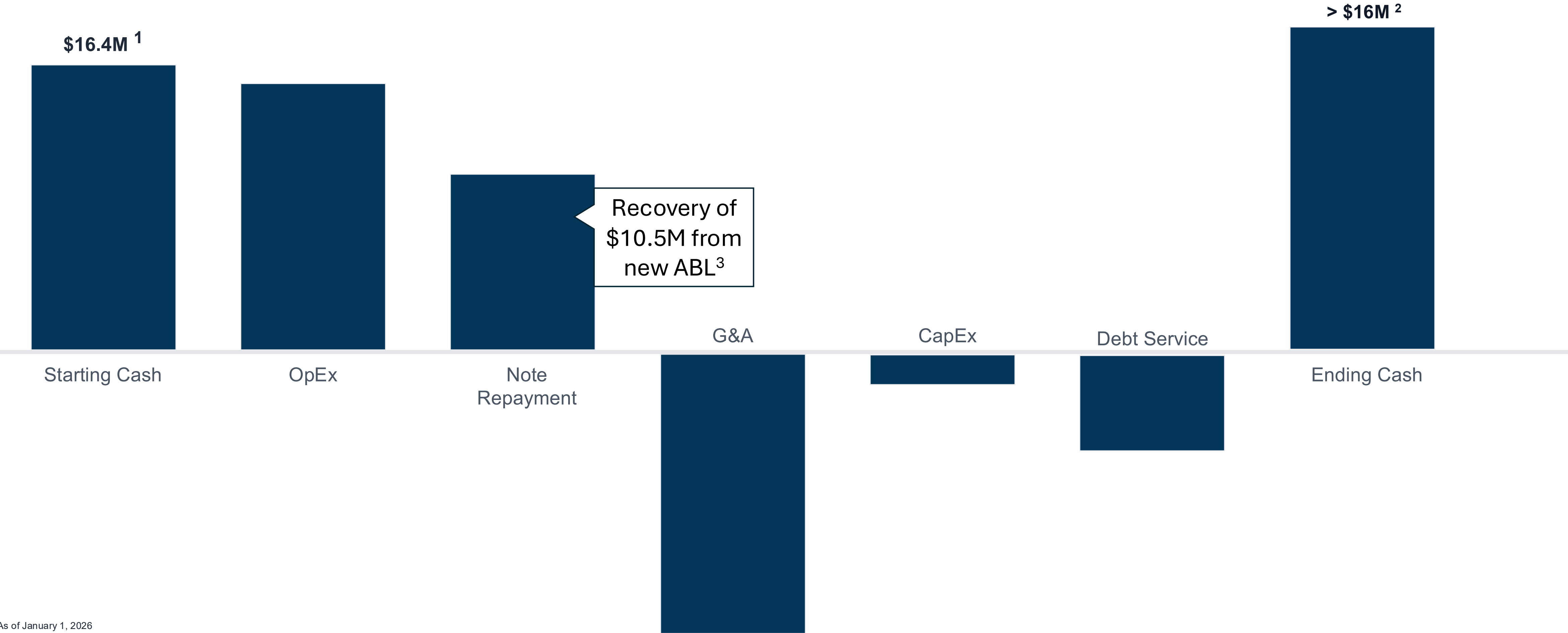
Headcount

129 to 135

Sources and Uses of Cash (FY26 Plan)



Disciplined cost structure and cash flow expected to cover current operating expenses



¹ As of January 1, 2026

² As of December 31, 2026

³ The Company has entered into a non-binding term sheet with a large U.S. financial institution with respect to a potential credit facility. The term sheet reflects preliminary terms and conditions only and does not constitute a commitment to provide financing. Any credit facility remains subject to, among other things, negotiation and execution of definitive documentation, completion of customary due diligence, receipt of required internal approvals, and satisfaction of customary closing conditions. There can be no assurance that a definitive credit agreement will be entered into or that the contemplated financing will be completed on the terms described, or at all.



XTIA Capitalization Table

As of February 1, 2026

Total Common Shares Outstanding	34,508,796
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UMAC Pre-Funded Warrant Shares ¹	15,307,735
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Class B Units (Restricted) ²	6,524,576
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Stock Options @ \$2.69 weighted average exercise price	17,445,746
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Warrant Shares @ \$2.00 exercise price	23,572,300
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Warrant Shares @ \$16.37 weighted average exercise price	1,641,117
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Total Fully Diluted Shares Outstanding	99,000,270
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¹The Pre-Funded Warrant issued to UMAC to purchase 15,307,735 shares of common stock has an exercise price of \$0.0001 per share and is immediately exercisable and may be exercised at any time until it is exercised in full, subject to beneficial ownership limitations.

²The Class B Units are exchangeable at any time after May 1, 2026 for shares of common stock on a one-for-one basis. In addition, on the date that is 15 months after November 10, 2025, all outstanding Class B Units will automatically be exchanged for shares of common stock on a one-for-one basis, subject to adjustments.

FY2026 Growth Plan



2026 Industry Growth forecast at ~15%



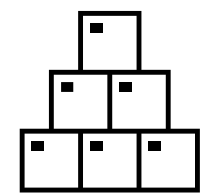
Holding market share creates ~50% of the planned growth



Additional growth from focus on:

Organic Growth

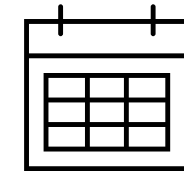
M&A & Other Growth



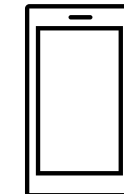
**Product
Addition
& Mix**



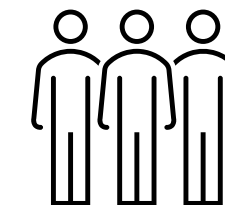
**Key Vertical
Focus**



**Increased
Events &
Education**



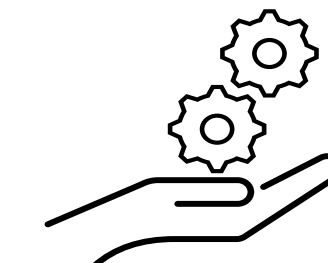
**Expansion
of Digital
Presence**



**Sales Team
Expansion**



**Acquisitions,
JVs &
Partnerships**

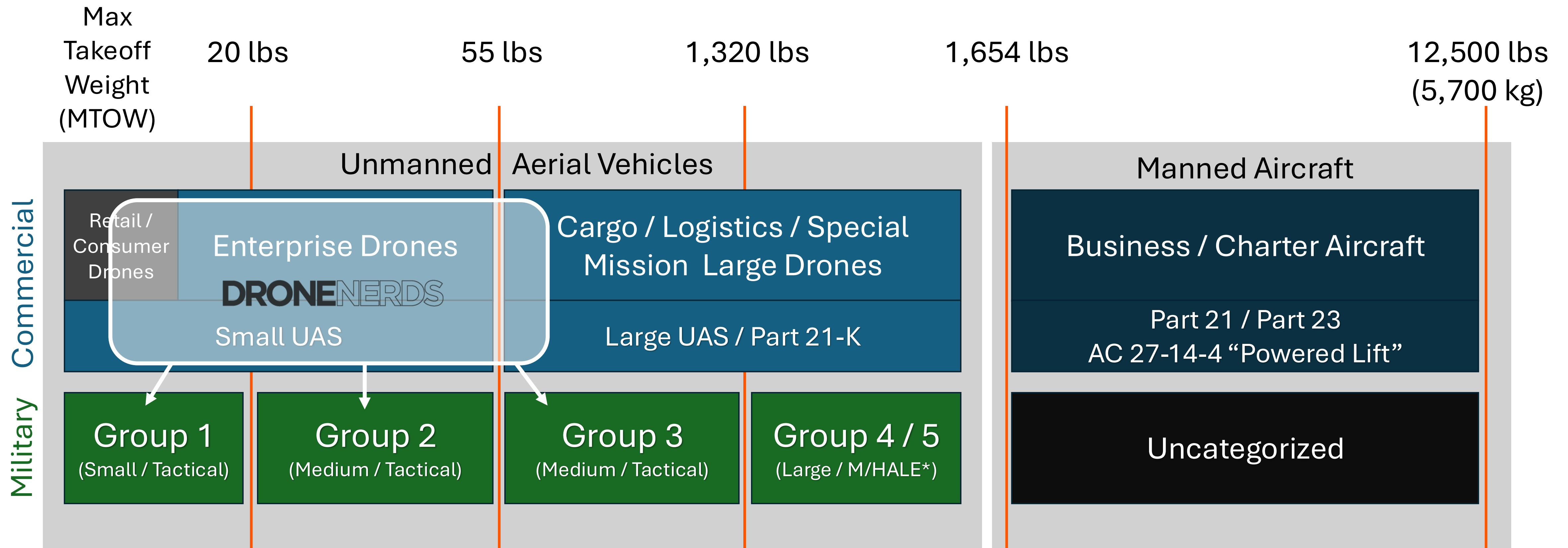


Services

Expansion into Military Market



XTI is well positioned for adoption into military markets through Commercial Off-the-Shelf (COTS) and unique missionization



* MALE (Medium Altitude, Long Endurance / HALE (High Altitude, Long Endurance)

De-Risk Scale & Lead



- Accelerating time-to-value...prioritizing near term drone opportunity
- Scale proven revenue model now, optionality on VTOL later
- Fast realignment of costs and revenues provides sustainability
- Platform positions XTI for significant organic and acquisitive growth
- Deep understanding of "commercial-off-the-shelf" (COTS) solutions positions us well for military expansion
- Future is unlimited – potential for participation in entire landscape





Thank You

Check out the New XTI Aerospace Website!

