

**BEFORE THE PUBLIC SERVICE COMMISSION
OF THE STATE OF MISSOURI**

In the Matter of the Application of Union Electric	)	
Company, d/b/a Ameren Missouri, for Permission and	)	
Approval and Certificate of Public Convenience and	)	File No. EA-2025-0238
Necessity Authorizing it to Construct a Simple Cycle	)	
Natural Gas Generation Facility.	)	

SUBMISSION OF QUARTERLY REPORT
UNDER ¶ 5.b OF STIPULATION AND AGREEMENT

COMES NOW Union Electric Company d/b/a Ameren Missouri (“Ameren Missouri” or “Company”), and pursuant to ¶ 5.b of the January 29, 2026, Stipulation and Agreement filed in this case and approved by the Commission, hereby submits its Quarterly Progress Report for the 2nd quarter of 2026 for the simple cycle combustion turbine generator ("CTG") and battery energy storage system ("BESS") installations at the Big Hollow site, as follows:

Big Hollow CTG

Detailed design and engineering are in progress. The project has submitted its first set of permit applications to Jefferson County. The construction air permit is pending at the Missouri Department of Natural Resources and expected in short order. The Engineering, Procurement, and Construction (EPC) contractor has mobilized on-site. Fill work and site grading have begun and construction facilities have been set up and established. See Exhibit A, Construction Schedule, attached for specific construction activities completed. See attached update Exhibit B for the current status of permitting efforts. The base case project cost projection remains unchanged. The risk-adjusted project cost estimate has been slightly reduced. The expected projected tariff costs from the turbine manufacturer, GE Vernova, are projected to be reduced from the original cost estimate by approximately \$10 million due to the February 20, 2026, U.S. Supreme Court ruling the IEEPA tariffs were unlawful and invalid, but tariffs under Section 122 of the Trade Act of 1974 are still in effect. There are no other updates regarding

legislative or executive actions.

See below for specific activities completed and plans/specifications received in Q2 2026:

April 2026

- No significant EPC construction activities
- The selective catalytic reduction (SCR) equipment supplier, Nooter-Eriksen, has completed its engineering and has nearly completed its procurement. Nooter-Eriksen has begun manufacturing the SCR components.
- GE Vernova continues to work on detailed design. No manufacturing has begun.

May 2026

- EPC has submitted several calculation packages for review.
- EPC continues to refine Piping and Instrumentation Diagrams.
- EPC has begun modeling piping for ammonia and other water systems.
- EPC has completed the general arrangements for several buildings and areas.
- EPC has begun foundation design for the SCR and stack.
- EPC mobilized and established construction facilities and craft onboarding.
- Nooter-Eriksen continues manufacturing the SCR components.
- GE Vernova continues to work on detailed design. No manufacturing has begun.

June 2026

- EPC began fuel oil tank and demineralizer tank foundation design.
- EPC began ammonia storage tank and unloading foundation design.
- EPC has finalized the Piping and Instrumentation Diagrams.
- EPC has begun underground piping design.
- EPC began mass grading and fill activities in preparation for pile installation.
- EPC has received H-pile.
- Enable Mississippi River Transmission (MRT) received FERC 7c Certificate on June 10, 2026 for the gas supply pipeline infrastructure.
- MRT continues to acquire easements (in Illinois) for the pipeline installation. Pipeline construction timeline has not been established with the advancement of the FERC 7c Certificate approval.
- Nooter-Eriksen continues manufacturing the SCR components and will begin shipping components in September.
- GE Vernova continues to work on detailed design. No manufacturing has begun.

As noted, Enable Mississippi River Transmission received the FERC 7c Certificate on June 10, 2026, for the gas supply pipeline infrastructure. The Company has no information regarding any delays to the MRT lateral's construction or in-service date.

See attached Exhibit C – HC – CTG, for CWIP balances, costs incurred, and AFUDC accrued.

Big Hollow BESS

Detailed design and engineering are in progress. The project has submitted its first set of permit applications to Jefferson County. The EPC contractor has mobilized and established temporary construction facilities. Material importation, grading, and fill work have begun. See Exhibit D, Construction Schedule, attached for specific construction activities completed. See attached Exhibit E Big Hollow BESS Permit Matrix for the current status of permitting efforts.

Construction cost projections have decreased since the CCN filing. Favorable negotiations with the EPC contractor resulted in a roughly \$25 million cost reduction. In addition, some federal tariffs affecting the project have been reduced or removed due to the Supreme Court ruling that the IEEPA tariffs were invalid; however, the current administration has signaled that they would be replaced. Ameren Missouri is hopeful that the bulk of the material will be brought into the country prior to replacement of those tariffs, but the project forecast will maintain tariff contingency until final cost is known.

The estimated tax credits for the project amount to 50% of the project cost – 30% for a BESS project, 10% for using the requisite amount of domestic content,¹ and an additional 10% for locating the project at an "energy community." This represents the maximum allowable tax credit for this project under the Inflation Reduction Act of 2022. There has been no indication to date that the project will be impacted by Foreign Entity of Concern implications. There are no other updates regarding legislative or executive actions.

See below for specific activities completed and plans/specifications received in Q2 2026:

April 2026

- EPC mobilized and set up temporary construction facilities.
- EPC submitted 60% Electrical drawings and studies.

¹ The Company continues to pursue the domestic content bonus through its BESS supplier, which has contractually committed to meeting the applicable requirements; however, there remains some risk that the bonus requirements ultimately may not be satisfied.

- EPC submitted 60% Structural drawings and calculations.
- Geotech samples collected.

May 2026

- EPC submitted 60% Civil Drawings.
- Material import, backfill and grading begun.

June 2026

- EPC submitted 90% Civil Drawings.
- EPC submitted 90% Structural drawings and calculations.
- Geotech submitted Geotech report.
- Material import, backfill and grading continued.

See attached Exhibit C - HC - BESS for CWIP balances, costs incurred and AFUDC accrued.

Respectfully Submitted,

/s/ **James B. Lowery**

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ATTORNEYS FOR UNION ELECTRIC

COMPANY d/b/a AMEREN MISSOURI

CERTIFICATE OF SERVICE

The undersigned certifies that true and correct copies of the foregoing was served on counsel for all parties of record via electronic mail (e-mail) on this 15th day of July, 2026.

/s/ James B. Lowery