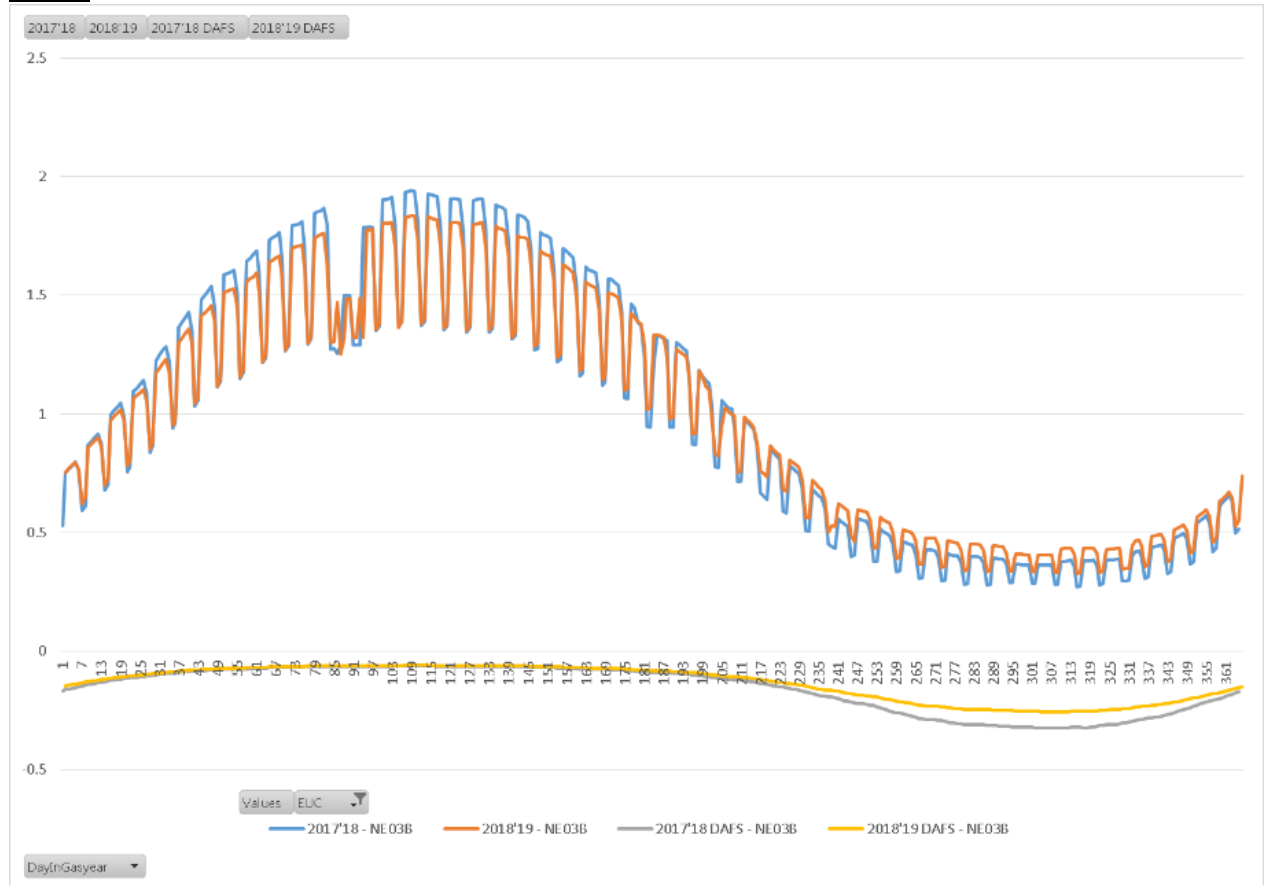
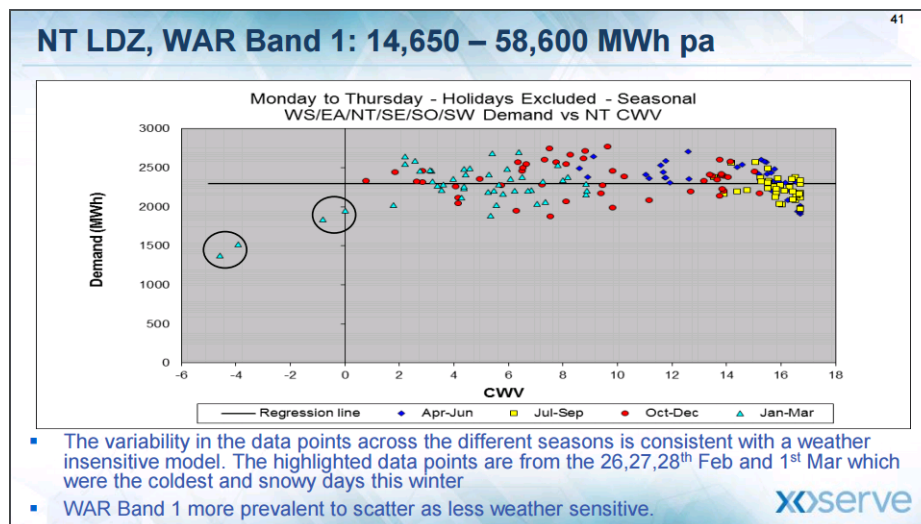


## General Observations

### NE03B



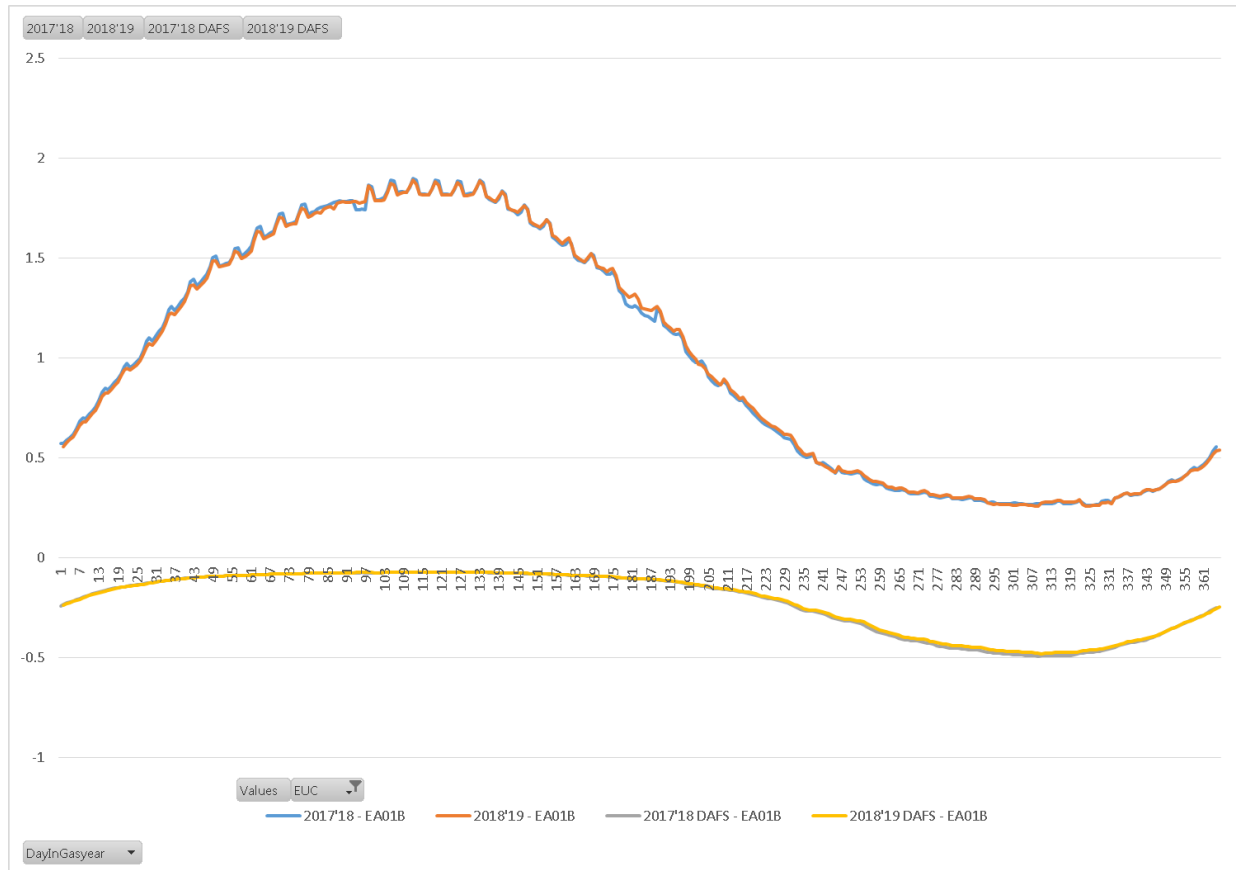
ALPs: NE03B, above, is typical of the lower winter ALPs for EUC bands 2+, much lower seasonality (lower winter, higher summer demand) – is this the result of additional samples? Or has the impact of the cold weather shutdowns impacted these ALPs, e.g. from DESC - 15<sup>th</sup> May we reviewed the lower demands during cold CWV for large NDM, is this behaviour reflected in EUC bands 2-3 - don't recall us reviewing that.



It's important that we are able to see if the lower demands during the cold weather upturn is resulting in these lower ALPs. How significant is the impact given it is 4 days. Thoughts so far have been it shouldn't have an impact, so it be great to confirm this.

DAFs: EUC 3B across the LDZs has lower summer DAFs, e.g. NE03B:

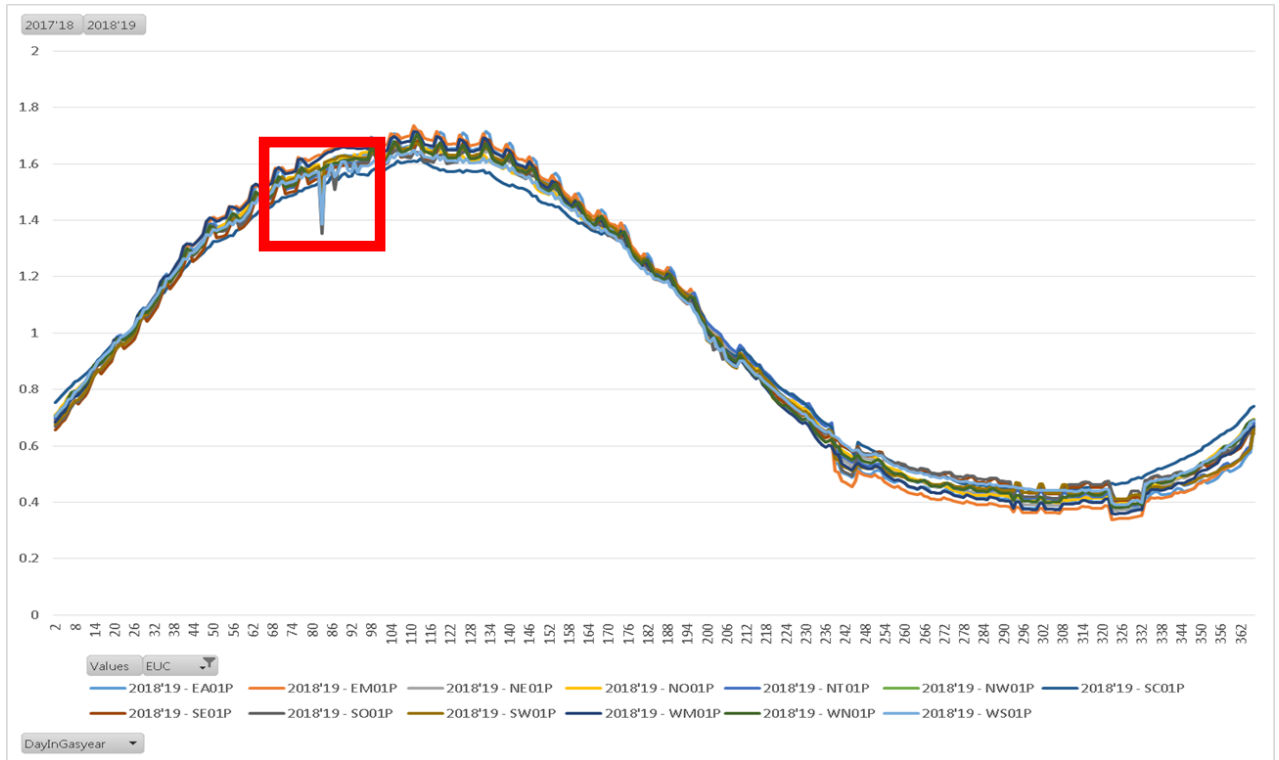
**EA01B**



EUC band 1B ALPS: in general slightly less seasonality – slightly less demand in winter, more in summer, it would imply that the impact of the cold Feb/March 2018 wasn't significant enough (higher winter demand) to lead to a significant change in the ALPS, compared to the previous gas year. Is this puzzling given it was the coldest Feb/Mar for many years.

I can see the removal of lower New Year's "trough" for several EUC 1B profiles, the impact from holiday codes hasn't affected the profiles this year. Does a future potential impact remain?

**Prepayment profiles**



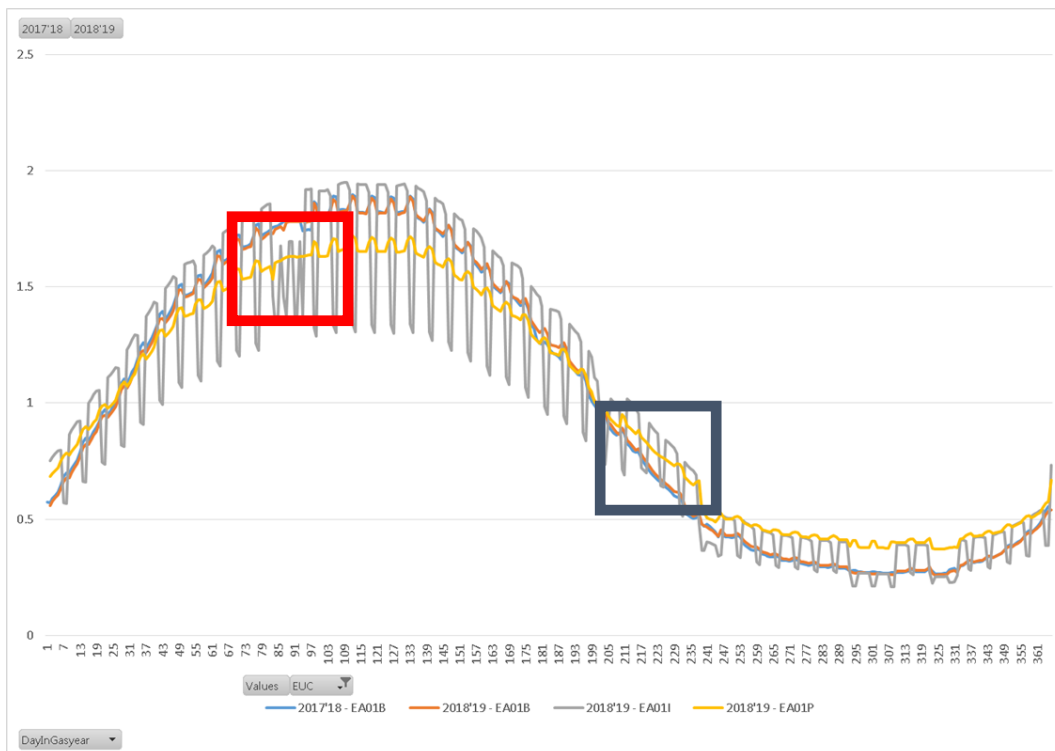
EM has greatest seasonality, SC - lowest.

WS, SW, SO – Christmas drop in red? 21/12/2018. Rest of LDZs smaller drop.

### EA011 – new non-domestic profile

Holiday code impacts for Christmas – see red box

Higher levels of weekend demands – see blue box



Prepayment profiles (in yellow), less seasonality (as expected) vs credit (EUC1B).

**In general,**

ALPs are not moving directionally in the right direction for UIG. Either this confirms the accuracy of demand estimation or the sample still remains unrepresentative.

Prepayment profiles make sense, less seasonality than credit.

DAFs have less summer weather response for 3B across the LDZs.

EUC band 1 Non-domestic profile make sense, represents business profile and greater holiday effects.