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May 21, 2026

The Board of Commissioners of Public Utilities
Prince Charles Building
120 Torbay Road, P.O. Box 21040
St. John's, NL A1A 5B2

Attention: Mike McNiven
Board Secretary

Re: Monthly Energy Supply Report for the Island Interconnected System for April 2026 – Revision 1

Enclosed please find Newfoundland and Labrador Hydro's revised Monthly Energy Supply Report for the Island Interconnected System, filed with the Board of Commissioners of Public Utilities on May 19, 2025.

Hydro has been made aware of a software error that resulted in missing table and figure references and duplicative sentences within the report. The errors have been corrected in the attached revision. For ease of reference, changes have been shaded in grey.

Should you have any questions, please contact the undersigned.

Yours truly,

NEWFOUNDLAND AND LABRADOR HYDRO

Shirley A. Walsh
Senior Legal Counsel, Regulatory
SAW/mc

Encl.

ecc:

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Revision History

Revision No.	Revision Date	Location	Reason
1	21-May-2026	Sec 2.0, at p. 3, lines 1 -2 Sec 2.0, at p. 4, footnote 5 Sec 2.0, at p. 5, line 15	References to figures and tables added.
1	21-May-2026	Sec 5.0, at p. 7, lines 7 -9 Sec 5.0, at p. 8, line 3	Duplicate sentences removed.

Monthly Energy Supply Report for the Island Interconnected System for April 2026

Original Submission: May 19, 2026

Revision 1: May 21, 2026

A report to the Board of Commissioners of Public Utilities



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1.0 Introduction

On February 8, 2016, the Board of Commissioners of Public Utilities (“Board”) requested Newfoundland and Labrador Hydro (“Hydro”) file a biweekly report containing, but not limited to, the following:

- 1) System Hydrology Report;
- 2) The thermal plant operated in support of hydrology;
- 3) Production by plant/unit; and
- 4) Details of any current or anticipated long-term derating.

In July 2016, the Board indicated that a monthly report would thereafter be sufficient. This report provides data for April 2026.

Ownership of the Water Management function resides within Hydro in the Resource and Production Planning department and is at all times guided by Hydro’s operating instructions and environmental standards. This group works in consultation with Energy Marketing to optimize the use of Hydro’s hydrologic resources through imports/exports and to ensure that the security of supply for domestic load for Hydro’s customers remains paramount in all decisions, ensuring the delivery of least-cost, reliable service in an environmentally responsible manner.

2.0 System Hydrology

Reservoir inflows in April 2026 were 23% below the month’s historical average.¹ Table 1 summarizes the aggregate storage position of Hydro’s reservoirs at the end of the reporting period.

Table 1: System Hydrology Storage Levels

	2026	2025	20-Year	Minimum	Maximum	Maximum
Date	(GWh)	(GWh)	Average	Storage Limit	Operating	Operating
			(GWh)	(GWh)	Level	Level
					(GWh)	(%)
30-April-2026	1,453	2,034	1,736	220	2,516	58

¹ Calculated in terms of energy [gigawatt hour (“GWh”)].

1 The aggregate reservoir storage level on April 30, 2026 was 1,453 GWh, which is 42% below the
2 seasonal maximum operating level and 560% above the minimum storage limit.² Total system energy for
3 the month increased by 69 GWh overall, resulting in a total system energy storage 283 GWh below the
4 20-year average. Inflows to the reservoirs of the Bay d’Espoir Hydroelectric Generating Station (“Bay
5 d’Espoir”) were 80% of average in April 2026. Inflows to the Hinds Lake Reservoir were 71% of average
6 and inflows to the Cat Arm Reservoir were 60% of average during the month.

7 Total precipitation for the month of April across Hydro’s reservoir system was 72 mm at Burnt Dam, 88.9
8 mm at Long Pond, and 81.3 mm at Hinds Lake. Most of the precipitation fell as snow because of cold
9 weather for most of the island in the first half of April. Above freezing temperatures started by mid-
10 April.

11 The April snow survey of the island hydroelectric system took place from April 14 to 16, 2026. The
12 survey covered the Bay d’Espoir system and the Hinds Lake watershed but, because of poor weather
13 conditions, the survey team could not reach the Cat Arm watershed. The survey indicated that
14 measured snow water equivalent was above average at all locations surveyed except for the Long Pond
15 watershed, which was below the April average as snow melt had already largely occurred in that
16 watershed. Upper Salmon snowpack was found to be 347% of average, Meelpaeg was 319% of average,
17 Granite Lake was 102% of average, Burnt Pond was 163% of average, Victoria Lake was 178% of average
18 and Hinds Lake was 148% of average.

² Minimum storage limits are developed annually to provide guidance in the reliable operation of Hydro’s major reservoirs—Victoria, Meelpaeg, Long Pond, Cat Arm, and Hinds Lake. The minimum storage limit is designed to indicate the minimum level of aggregate storage required such that if there was a repeat of Hydro’s critical dry sequence, or other less severe sequence, Hydro’s load can still be met through the use of the available hydraulic storage supplemented with maximized deliveries of power from the Muskrat Falls Hydroelectric Generating Facility (“Muskrat Falls”) over the Labrador-Island Link (“LIL”). Hydro’s long-term critical dry sequence is defined as January 1959 to March 1962. Other dry periods are also considered during this analysis to ensure that no other shorter-term historic dry sequence could result in insufficient storage.

1 **Table 2** summarizes the unit outages experienced during April 2026.

Table 2: April 2026 Unit Outage Summary

Unit Name	Date Offline	Return to Service	Outage type	Notes
Paradise River	March 22, 2026	April 2, 2026	Planned	n/a
Bay d’Espoir Unit 7	April 2, 2026	April 2, 2026	Planned	n/a
Bay d’Espoir Unit 5	April 6, 2026	May 5, 2026	Planned	Forced extension to planned outage from May 1 to May 5, 2026 due to issue with B3T6-1 disconnect.
Bay d’Espoir Unit 6	April 6, 2026	May 5, 2026	Planned	Forced extension to planned outage from May 1 to May 5, 2026 due to issue with B3T6-1 disconnect.
Bay d’Espoir Unit 1	April 13, 2026	April 14, 2026	Unplanned	Unit trip due to protection relay settings.
Bay d’Espoir Unit 1	April 19, 2026	April 20, 2026	Unplanned	Unit trip due to protection relay settings.
Bay d’Espoir Unit 3	April 24, 2026	April 24, 2026	Planned	n/a
Bay d’Espoir Unit 4	April 24, 2026	April 24, 2026	Planned	n/a
Bay d’Espoir Unit 1	April 28, 2026	April 28, 2026	Planned	n/a
Bay d’Espoir Unit 4	April 29, 2026	April 29, 2026	Planned	n/a

2 **Figure 1** plots the 2025 and 2026 storage levels, minimum storage limits, maximum operating level
 3 storage, and 20-year average aggregate storage for comparison. Hydro has established the minimum
 4 storage limits to April 30, 2026.^{3,4}

³ The minimum storage limits for 2025–2026 have been updated as of September 30, 2025 utilizing the LIL transmission limits associated with the full or final under-frequency load shedding (“UFLS”) scheme as opposed to the previously presented and interim UFLS scheme. The final UFLS scheme was implemented on November 24, 2025. The LIL final UFLS scheme allows for incrementally more LIL energy to be brought to the Island without the need to export more energy over the ML export path. This resulted in a small adjustment downwards of the monthly minimum storage limits.

⁴ The minimum storage methodology was updated to ensure Hydro’s reservoirs could continue to provide reliable service to customers at the lowest possible cost, in an environmentally responsible manner. The 2025–2026 analysis assumed that only two units at the Holyrood Thermal Generating Station (“Holyrood TGS”) would be online and operating at minimum load during the winter 2025–2026 period.

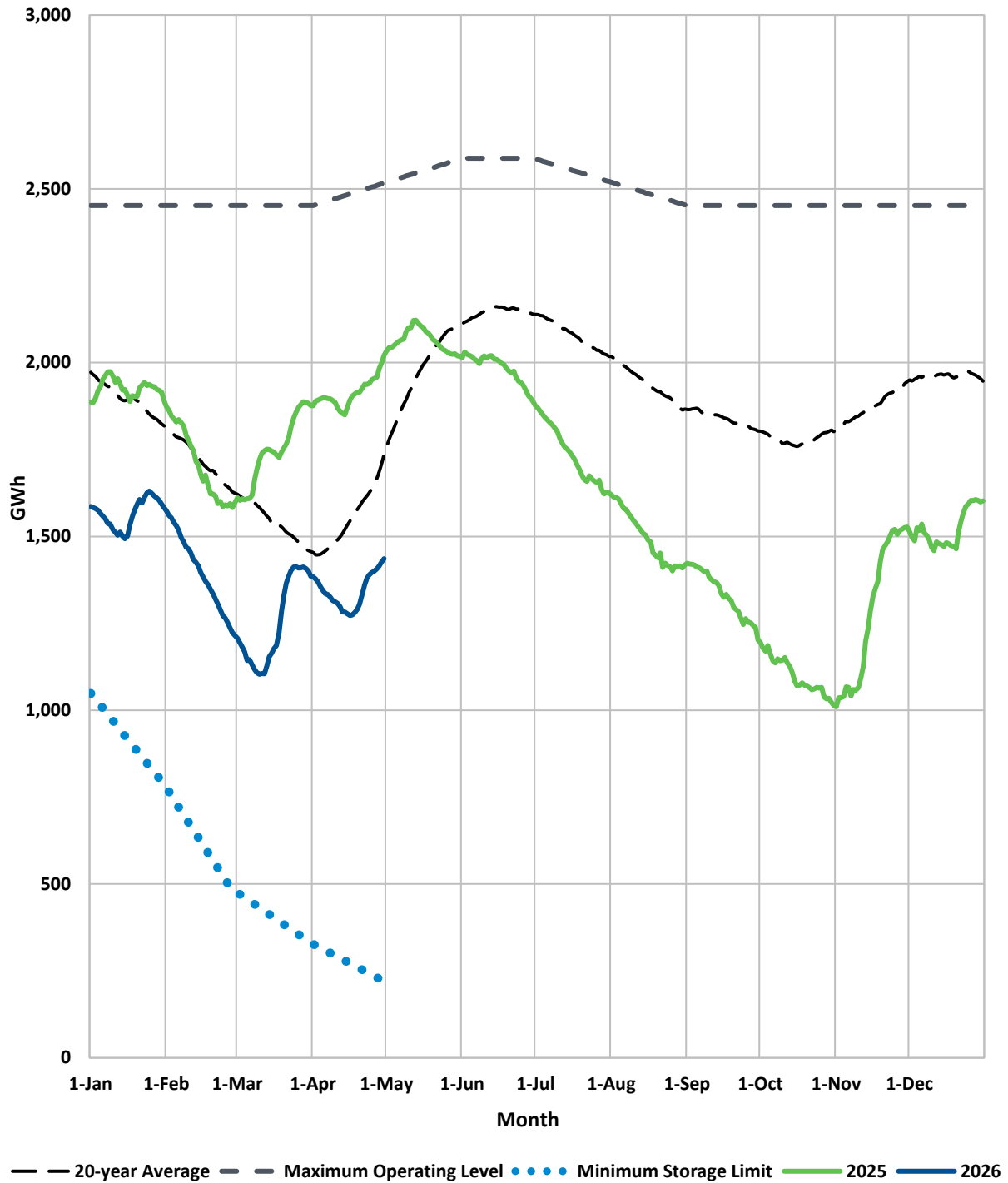


Figure 1: Total System Energy Storage⁵

⁵ Data points in Figure 1 represent storage at the beginning of each day. Table 1 reports the end-of-day storage values, which results in a small difference between the storage data presented in Table 1 and Figure 1.

2.1 Ponding

In Board Order No. P.U. 49(2018), the Board approved Hydro’s application for approval of a Pilot Agreement for the Optimization of Hydraulic Resources (“Pilot Agreement”).⁶ The intent of the Pilot Agreement is to optimize Hydro’s hydraulic resources through the strategic use of its storage capabilities, taking advantage of the variability of energy pricing in external markets over time.

Appendix A provides information regarding imported and exported energy transactions under the Pilot Agreement during the month. With spring runoff commencing and higher than average snowpack for April, imports for ponding were placed on hold and the previous hold on ponding exports dating back to July 2025 was removed on April 28, 2026. There were however, no ponding exports or imports over the Maritime Link (“ML”) in April 2026.

2.2 Spill Activity

Appendix A provides information regarding spill avoidance export transactions undertaken.⁷ No releases of water were required at any locations on the Island Interconnected System in April 2026, and no spill avoidance exports were required during the month. A summary of the year-to-date (“YTD”) total volumes spilled or bypassed in both MCM⁸ and GWh can be found in Table 3.

Table 3: Spill Activity

	Granite Canal Bypass		Burnt Dam Spillway	
	MCM	GWh	MCM	GWh
30-April-2026	-	-	-	-
YTD Total	23.6	2.2	9.9	6.5

⁶ The Third Amended and Restated Pilot Agreement for the Optimization of Hydraulic Resources was approved as per Board Order No. P.U. 35(2022), and was extended as per Board Order No. P.U. 30(2023), Board Order No. P.U. 29(2024), and again in Board Order No. P.U. 37(2025).

⁷ Pursuant to the Pilot Agreement, exporting when system load is low allows for increased generation from Island hydraulic facilities and the utilization of water (energy) that would have otherwise been spilled, while not increasing the risk of spill elsewhere in the system.

⁸ Million cubic metres (“MCM”).

3.0 Production and Purchases

Appendix B provides a breakdown of power purchases, including the import and export activity over the LIL and ML as well as production by plant during April 2026.⁹ There was 0.4 GWh of energy was repaid from Corner Brook Pulp and Paper (“CBPP”) to Energy Marketing under the Temporary Energy Exchange Agreement in April 2026. This energy was exported over the ML. No emergency energy was supplied to Nova Scotia over the ML during April 2026.

4.0 Thermal Production

Holyrood TGS Units 1 and 2 were online during the month of April 2026 for system requirements.

Holyrood TGS Unit 1 was online during the entire month of April 2026.¹⁰ Holyrood TGS Unit 2 was placed in standby on April 9, 2026, as it was no longer required to support system demand. The unit was then taken offline on April 21, 2026 for a planned outage. The unit was then briefly brought online on April 30, 2026 as part of commissioning activities associated with the outage and immediately taken offline again on May 1, 2026, to resume its planned outage. Total energy production from Holyrood TGS for the month was 51.6 GWh. Standby generation was not used to support reservoir storage. The operating hours for the Holyrood TGS, Holyrood Combustion Turbine (“CT”), and the Hardwoods and Stephenville Gas Turbines (“GT”) are summarized in Table 4.

⁹ In January 2026, Hydro entered into a fourth power purchase agreement (“PPA”) with CBPP as directed by Government. The PPA with CBPP provides Hydro with 140 GWh of non-firm energy from the expiry of the October 2025 PPA to June 30, 2026, inclusive. The PPA was delivered in full in April 2026.

¹⁰ On May 1, 2026, the unit was taken offline and placed in standby as it was no longer required to support system energy requirements.

Table 4: Holyrood TGS and Combustion Turbines Operating Hours

	Operating Hours	Sync Condense Hours	Available Hours
Holyrood TGS			
Unit 1	720.0	0.0	720.0
Unit 2	205.0	0.0	502.1
Unit 3	0.0	0.0	0.0
Combustion Turbines			
Hardwoods GT	1.3	718.7	720.0
Stephenville GT	5.2	14.4	574.6
Holyrood CT	0.0	0.0	558.0

1 **5.0 Unit Deratings**

2 Holyrood TGS Unit 1 operated under a derate to 166 MW for the entire month of April 2026. This derate
 3 was due to an ongoing issue with high condenser back pressure. Hydro has determined through
 4 investigation and testing that the high back pressure was due to deteriorated vacuum pump
 5 performance, which will be addressed during the unit’s planned annual outage. On May 1, 2026, the
 6 unit was taken offline and placed in standby as it was no longer required to support system
 7 requirements. [].

8 Holyrood TGS Unit 2 was online and available for full load until April 9, 2026, when it was taken offline
 9 and placed on standby because it was not required to support system requirements. []. From April 21 to
 10 30, 2026, the unit was on a planned outage to complete a capital work to upgrade the boiler flame
 11 scanners. The unit was put online on April 30, 2026 for commissioning of the flame scanners. Online
 12 commissioning was completed on May 1, 2026, and the unit was returned to standby as it was not
 13 required for system support. The west forced draft fan failed during startup on April 27, 2026. The
 14 inboard bearing will require replacement during the unit’s planned annual outage. This failure derated
 15 the unit to 40 MW during commissioning of the flame scanners.

16 Holyrood TGS Unit 3 was on planned annual maintenance outage for the entire month of April 2026. The
 17 outage began on schedule on March 29, 2026, and will continue until July 18, 2026. On May 1, 2026 the
 18 generator was placed online in synchronous condenser mode. Balancing of the west forced draft fan is
 19 planned to be completed during the annual outage.

20 The Hardwoods GT was available at full capacity for the entire month of April 2026.

1 The Holyrood CT was available for the entire month of April 2026, with the exception of two planned
2 outages to complete preventative and corrective maintenance. The unit was made unavailable on April
3 19, 2026, and returned to service on April 21, 2026. [1]. The unit was taken offline to complete planned
4 work from April 26, 2026 to May 3, 2026.

5 Stephenville GT was available for the majority of April 2026, except for a forced derating of 50% when
6 End B was unavailable due to a starting issue caused by failed solenoid valves on the air starting system.
7 During testing of End B on April 11, 2026, a fire was experienced on the End B power turbine blankets
8 which resulted in a forced outage of the unit due to the depleted Inergen in the unit fire suppression
9 system. The fire system, End A, and the alternator was released for service on April 17, 2026. End B
10 remains unavailable as the investigation into the cause of the fire has determined the presence of an
11 exhaust leak at the power turbine inlet duct flange. Repairs of the inlet duct flange are ongoing and a
12 return to service date for End B has yet to be determined.

Appendix A

Ponding and Spill Transactions



Table A-1: Ponding Transactions

Date	Ponding Imports (MWh)	Ponding Exports (MWh)	Ponding Imports Purchased by Hydro (MWh)	Transfer of Pond Balance to Spill Avoidance (MWh)	Energy Losses to Export (MWh)	Cumulative Pondered Energy (MWh)
Opening Balance	-	-	-	-	-	(5,097)
Total ¹	-	-	-	-	-	-

Table A-2: Avoided Spill Energy

Date	Avoided Spill Exports (MWh)	Energy Losses to Export (MWh)	Transfer of Pond Balance to Spill Avoidance (MWh)	YTD Avoided Spill Energy (MWh)
Opening Balance	-	-	-	-
Total ²	-	-	-	-

¹ Total transactions for April 2026.

² Total transactions for April 2026.

Appendix B

Production and Purchases



Table B-1: Generation and Purchases (GWh)^{1,2}

	<u>Apr-26</u>	<u>YTD Apr 2026</u>
Hydro Generation (Hydro)		
Bay d'Espoir		
Unit 1	35.6	130.9
Unit 2	24.7	88.4
Unit 3	37.6	137.3
Unit 4	14.4	69.9
Unit 5	6.5	124.0
Unit 6	6.9	124.7
Unit 7	85.4	329.2
Subtotal Bay d'Espoir	<u>211.2</u>	<u>1,004.3</u>
Upper Salmon	47.8	193.3
Granite Canal	21.9	83.7
Hinds Lake	37.8	156.7
Cat Arm		
Unit 1	41.9	166.5
Unit 2	35.5	140.5
Subtotal Cat Arm	<u>77.4</u>	<u>307.0</u>
Paradise River	4.7	12.7
Star Lake	12.1	47.4
Rattle Brook	1.2	4.0
Exploits	48.4	192.2
Mini Hydro	0.0	0.0
Total Hydro Generation (Hydro)	<u>462.5</u>	<u>2,001.3</u>
Thermal Generation (Hydro)		
Holyrood TGS		
Unit 1	38.1	175.3
Unit 2	13.5	151.4
Unit 3	0.0	56.0
Subtotal Holyrood TGS Units	<u>51.6</u>	<u>382.7</u>
Holyrood Combustion Turbine and Diesels	0.0	6.6
Hardwoods Gas Turbine	0.0	0.9
Stephenville Gas Turbine	0.0	1.0
Other Thermal	0.0	0.2
Total Thermal Generation (Hydro)	<u>51.7</u>	<u>391.4</u>
Purchases		
Requested Newfoundland Power and Vale CBPP	0.0	0.2
Capacity Assistance	0.0	0.0
Power Purchase Agreement	30.9	149.3
Secondary	0.8	0.8
Co-Generation	1.1	1.1
Subtotal CBPP	<u>32.8</u>	<u>151.3</u>
Wind Purchases	13.6	73.3
Maritime Link Imports ³	0.0	1.2
New World Dairy	0.1	1.0
Labrador Island Link Delivery to IIS ^{4,5}	<u>138.1</u>	<u>515.4</u>
Total Purchases	<u>184.6</u>	<u>742.4</u>
Total	<u>698.8</u>	<u>3,135.1</u>

¹ Gross generation.

² Actuals reflect rounded values to the nearest tenth of a GWh. Differences between total versus addition of individual components due to rounding.

³ Includes energy flows as a result of purchases and inadvertent energy.

⁴ LIL deliveries to the Island Interconnected System are calculated as LIL imports of 286.1 GWh less ML exports of 148.0 GWh.

⁵ Net energy delivered to the Island Interconnected System is less than the total energy delivery to Hydro under the Muskrat Falls Power Purchase Agreement because of transmission losses on the LIL.