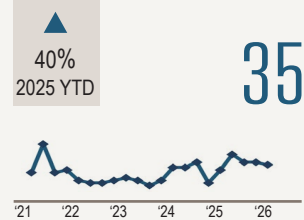


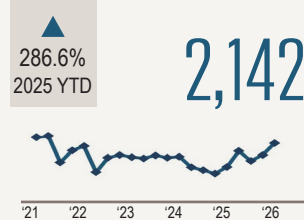
QUARTERLY PERFORMANCE REPORT

August 5, 2026

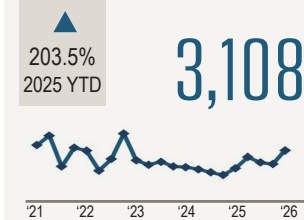
NUMBER OF
ASSISTED COMPANIES
2026 YTD



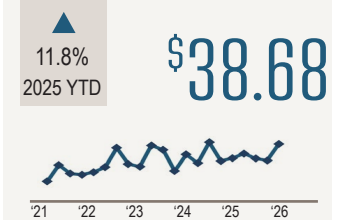
INITIAL JOBS FROM
ASSISTED COMPANIES
2026 YTD



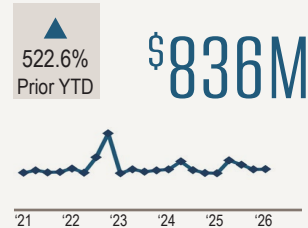
BUILD OUT JOBS FROM
ASSISTED COMPANIES
2026 YTD



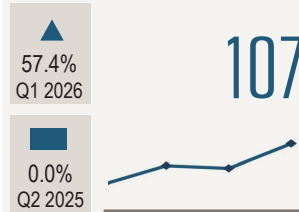
AVERAGE WAGE PAID BY
ASSISTED COMPANIES
2026 YTD



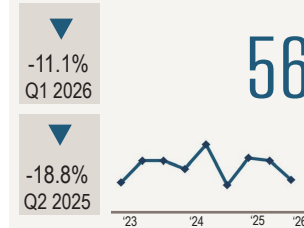
ASSISTED COMPANY
INVESTMENTS
2026 YTD



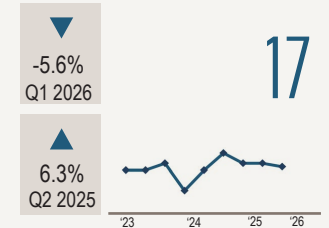
RETENTION MEETINGS
Q1 2026



NUMBER OF SITE VISITS
Q1 2026



NUMBER OF ASSISTED
WINS
Q1 2026

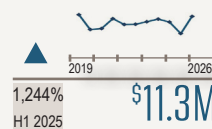


Assisted companies represent both abated and non-abated companies assisted in establishing or expanding business in Nevada.

DIVISIONS

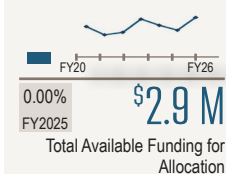
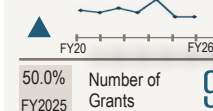
H2 2025 (Jul-Dec)

EMERGING
SMALL BUSINESS
PROGRAM



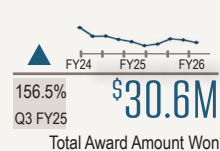
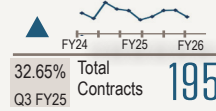
FY26

RURAL
COMMUNITY
DEVELOPMENT
BLOCK GRANTS



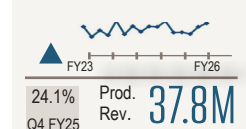
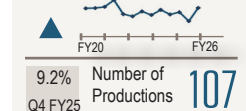
Q3 FY26

NEVADA
APEX
ACCELERATOR



Q3 FY26

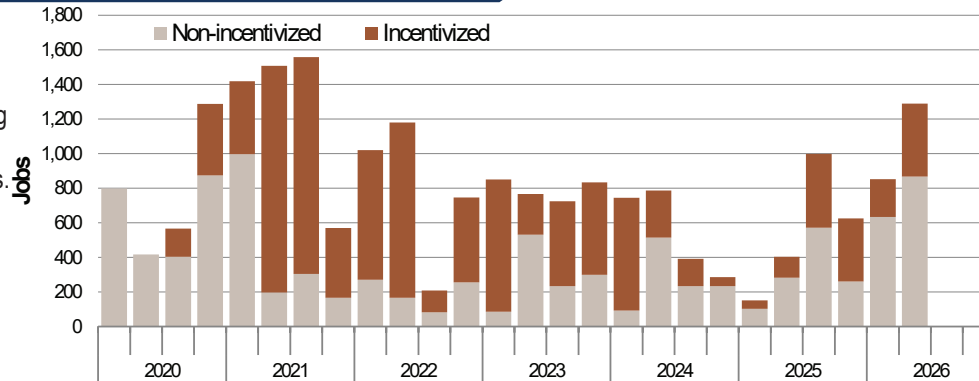
NEVADA
FILM OFFICE



JOBS ANNOUNCED BY ASSISTED COMPANIES

In the second quarter of 2026, seventeen companies committed to adding 1,290 jobs to Nevada's economy in the next two years. Once these companies are fully staffed, the build-out job estimate is 2,050 employees.

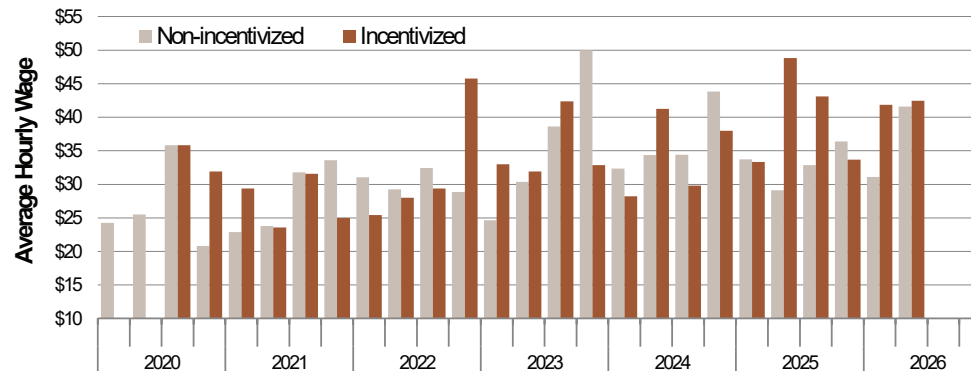
Of the additional jobs, 423 were incentivized and 867 jobs were non-incentivized.



1,290
Jobs Announced in
the 2nd Quarter

WAGES PAID BY ASSISTED COMPANIES

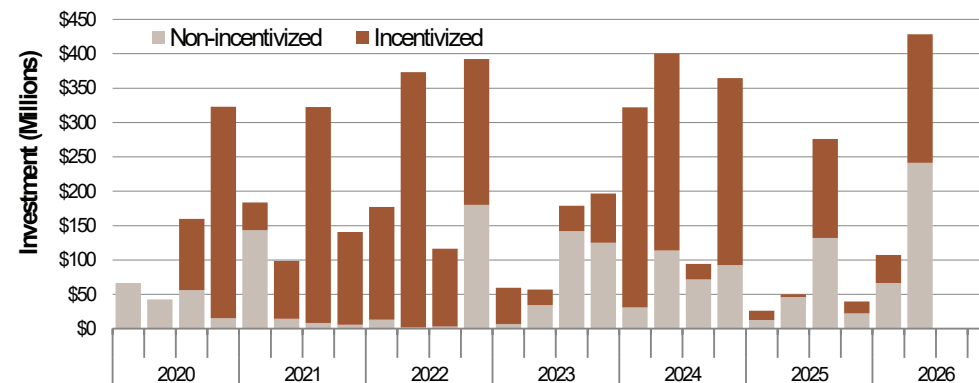
The average hourly wage paid by all assisted companies came in at \$41.87 in the second quarter of 2026, up about 19.7% up from the same quarter a year prior.



\$41.87
Weighted Average
Hourly Wage

CAPITAL INVESTMENT BY ASSISTED COMPANIES

Capital investment by assisted companies (excluding non-standard projects*) totaled \$428 Million in the second quarter, which represents a very large 757.5% percent increase from the same quarter in 2025; but about flat at a 5.2% increase from last quarter.



\$428M
Capital Investment from
assisted companies
(excluding non-
standard)

*Note: This chart does
not include investments
from non-standard
projects*

*Non-standard projects include Aviation, Data Centers, and large capital investment (\$1B or \$3.5B).

QUARTERLY WIN BREAKDOWN

Industry	Quarterly Wins					2025 Wins				
	Projects Won	2-yr Jobs	5-yr jobs	Weighted Avg Wage	Capital Investment	Projects Won	2-yr Jobs	5-yr jobs	Weighted Avg Wage	Capital Investment
Aerospace and Defense	-	-	-	-	-	-	-	-	-	-
Information Technology	1	75	100	\$76.59	\$3,765,000	3	489	514	\$38.66	\$304,765,000
Logistics & Operations	2	450	950	\$42.67	\$93,400,000	4	510	1,010	\$40.88	\$96,010,000
Manufacturing	10	748	969	\$38.18	\$307,180,544	16	1,095	1,495	\$37.59	\$364,656,954
Mining	-	-	-	-	-	-	-	-	-	-
Tourism, gaming, Ent.	-	-	-	-	-	-	-	-	-	-
Natural Resources	-	-	-	-	-	-	-	-	-	-
Service	4	17	31	\$29.98	\$24,030,000	12	48	89	\$40.30	\$70,235,000
Totals	17	1,290	2,050	\$41.87	\$428,375,544	35	2,142	3,108	\$38.68	\$835,666,954

QUARTERLY SITE VISITS

Companies looking to relocate to Nevada make up 80-90% of the leads/prospects. The other 10-20% are expansions. Regional Development Authorities (RDAs) reported 56 physical site visits for the second quarter of 2026, down just 7 from 63 site visits a quarter ago.

Some of the more notable site visits include:

Churchill Fallon Economic Development (CFED)

- » Three data centers
- » Multifamily housing development
- » Recreational drag strip developer
- » Solar Power project development

Northern NV Now (formerly EDAWN)

- » 20 manufacturing companies
- » 4 Aerospace and defense companies
- » Multiple Data Center and other IT Infrastructure companies
- » Mining and mineral exploration
- » Life sciences company
- » Alternative Energy project
- » Large construction company looking to establish new operation

Northern Nevada Development Authority (NNDA)

- » Insulated Concrete Form (ICF) building materials company
- » Tech Hub member material processing
- » Defense, mining, and refining critical minerals company

Southwest Central Regional Economic Development Authority (SWCREDA)

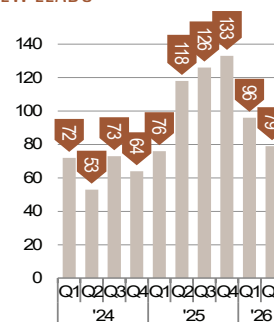
- » Motocross track and RV park

Las Vegas Global Economic Alliance (LVGEA)

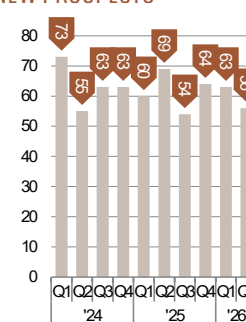
- » Health and Life Sciences company
- » Large venue operator for creative industry
- » Multiple Advanced Manufacturing companies

RECRUITMENT ACTIVITY: 2023Q1 – 2025Q2

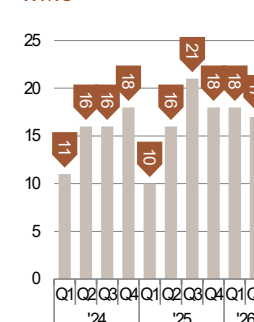
NEW LEADS



NEW PROSPECTS

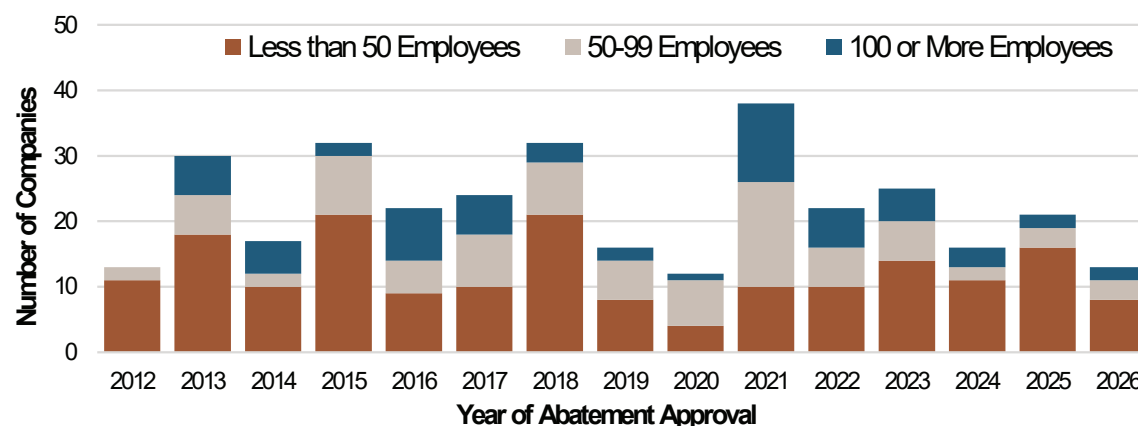


WINS



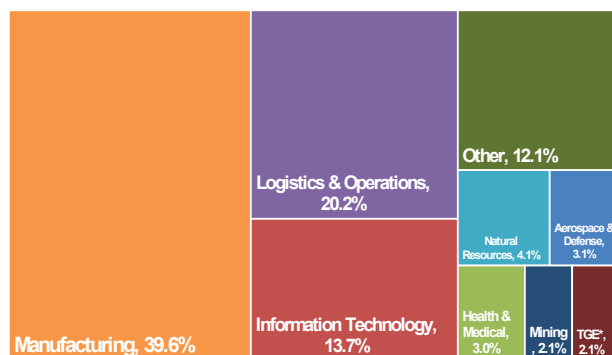
There were 17 wins in the second quarter of 2026. This is 6.3 percent higher than the same quarter a year prior. New leads were down 33.18 percent from last quarter and down 17.7 percent from the same quarter a year ago. Prospects were down 11 percent from last quarter, and down 18.8 percent compared to the same quarter in 2025.

ABATED COMPANIES BY SIZE CLASS



Of the 333 companies that have been abated since 2012 (across all abatement types, excluding withdrawn and noncompliant), 54.4 percent have had fewer than 50 employees within two years of operation. For the 13 companies abated so far in 2026, eight plan to have fewer than 50 employees in two years and only three plan to have between 50 and 99 employees.

ASSISTED COMPANY INDUSTRY MIX 2012 – 2025, BY NUMBER OF COMPANIES

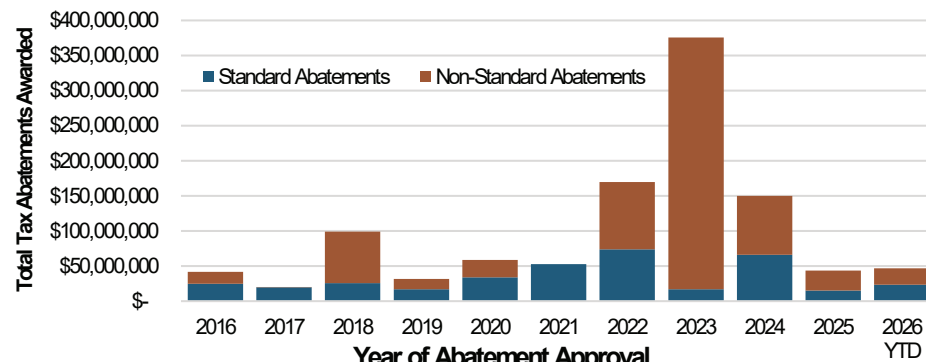


*Tourism, Gaming, and Entertainment

ANNUAL ASSISTED COMPANY STATISTICS

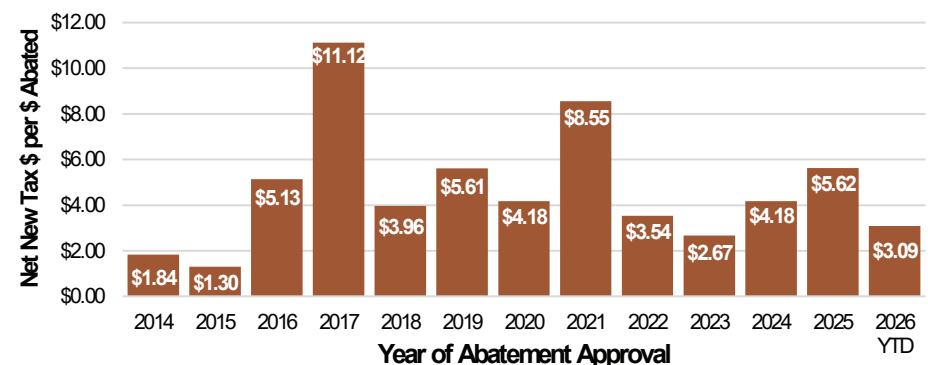
ALL COMPANIES						INCENTIVIZED COMPANIES							NON-INCENTIVIZED COMPANIES				
YEAR	COMPS	INITIAL JOBS	BUILD-OUT JOBS	AVERAGE WAGE	CAPITAL INVESTMENT	COMPS	INITIAL JOBS	BUILD-OUT JOBS	AVERAGE WAGE	CAPITAL INVESTMENT	TOTAL ABATEMENTS AWARDED	NEW TAXES OVER ABATEMENT LIFETIME	COMPS	INITIAL JOBS	BUILD-OUT JOBS	AVERAGE WAGE	CAPITAL INVESTMENT
2015	65	2,571	5,884	\$18.58	\$4,125,901,431	32	1,221	4,163	\$21.76	\$4,071,379,425	\$321,793,531	\$418,672,350	33	1,350	1,721	\$15.71	\$54,522,006
2016	49	3,775	5,731	\$16.91	\$541,486,207	22	2,899	4,042	\$17.33	\$519,661,707	\$41,851,201	\$214,782,991	27	876	1,689	\$15.52	\$21,824,500
2017	62	4,994	6,961	\$18.89	\$267,725,624	24	2,129	3,181	\$24.08	\$176,401,707	\$20,353,633	\$226,398,672	38	2,865	3,780	\$15.04	\$91,323,917
2018	71	3,209	6,214	\$28.32	\$1,507,996,453	32	1,369	3,418	\$29.09	\$1,181,665,551	\$99,193,149	\$393,030,425	39	1,840	2,796	\$27.76	\$326,330,902
2019	53	2,945	4,760	\$21.73	\$693,061,706	16	819	1,521	\$28.79	\$412,909,706	\$31,745,048	\$178,058,328	37	2,126	3,239	\$19.00	\$280,152,000
2020	49	3,069	5,122	\$26.61	\$892,240,254	12	576	1,290	\$33.02	\$711,466,889	\$58,874,904	\$245,891,308	37	2,493	3,832	\$25.12	\$180,773,365
2021	77	5,055	9,233	\$26.85	\$745,616,685	39	3,391	6,156	\$27.42	\$573,258,740	\$52,706,572	\$451,450,200	38	1,664	3,077	\$25.69	\$172,357,945
2022	45	3,112	6,272	\$30.51	\$2,207,676,060	22	2,337	4,929	\$30.65	\$2,009,563,882	\$169,792,969	\$600,965,519	23	775	1,343	\$30.10	\$198,112,178
2023	43	3,175	6,847	\$35.69	\$4,328,235,969	25	2,024	5,208	\$35.10	\$4,021,693,969	\$375,369,832	\$1,003,725,669	18	1,151	1,639	\$36.73	\$306,542,000
2024	61	2,207	2,869	\$34.08	\$2,198,748,740	16	1,133	1,457	\$32.01	\$1,889,602,832	\$149,982,081	\$626,252,901	45	1,074	1,412	\$36.27	\$309,145,908
2025	64	2,178	3,781	\$35.87	\$2,192,958,567	21	961	1,903	\$39.72	\$1,037,271,982	\$43,548,716	\$244,763,783	43	1,217	1,878	\$32.82	\$1,155,686,585
2026	35	2,142	3,108	\$38.68	\$835,666,954	13	642	917	\$42.25	\$527,721,954	\$46,998,428	\$145,110,014	22	1,500	2,191	\$37.15	\$307,945,000
Total	674	38,432	66,782	\$26.61	\$20,537,314,650	274	19,501	38,185	\$28.09	\$17,132,598,344	\$1,412,210,064	\$4,749,102,160	400	18,931	28,597	\$25.09	\$3,404,716,306

TOTAL TAX ABATEMENTS APPROVED, BY YEAR



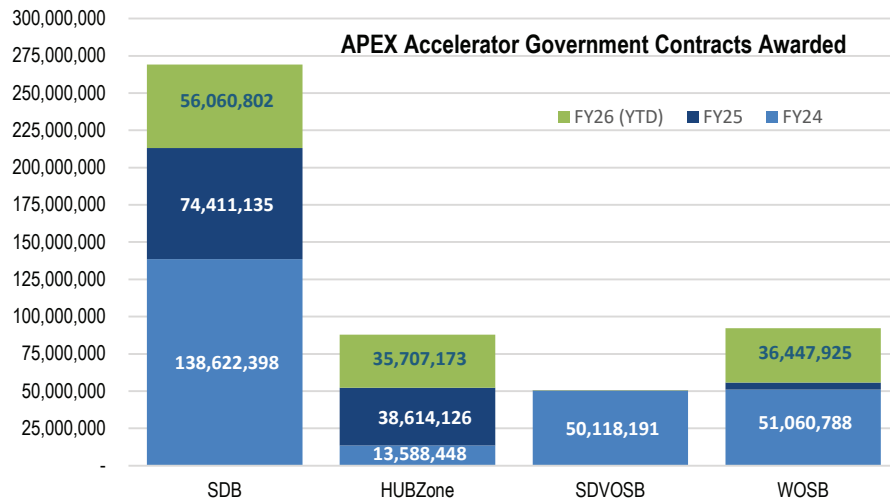
Note: These tables and charts exclude withdrawn and noncompliant companies. Above graph omits 2014 and 2015 for scale to allow for better visual comparison of recent years.

FISCAL RETURN ON INVESTMENT OF ABATEMENTS



For the past 12 years, the fiscal Return on Investment is 264%, meaning for every dollar abated the State and local governments receive \$2.64 in new taxes over the life of the abatements.

NEVADA APEX ACCELERATOR FORMERLY KNOWN AS THE NEVADA PROCUREMENT TECHNICAL ASSISTANCE CENTER (PTAC)

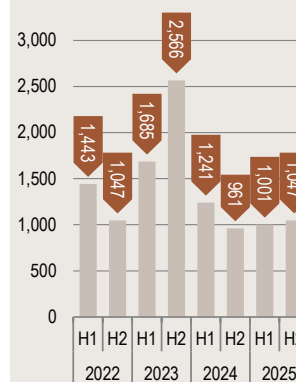


NEVADA APEX ACCELERATOR OVERVIEW

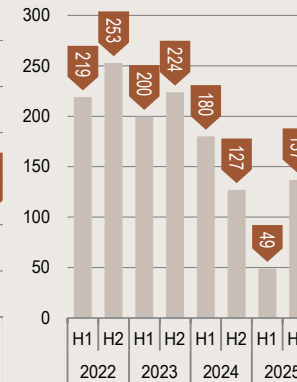
- » Due to timing of reporting, Apr - Jun data was unavailable. From January through March 2026 the NV APEX Accelerator was successful in assisting NV small businesses in getting 195 Contracts amounting to \$30.7 million. These number of contracts and amount of awards increased by 32.65% and increased by 156.5% respectively, when compared to the prior year in the same reporting period. Average Contract is \$157,359.
- » Small Disadvantaged Businesses (SDB) received 86 contracts for \$13.98 million.
- » Historically Under-utilized Business Zones (HUBZones) received 78 government contracts for \$12.4 million.
- » Service-Disabled Veteran-Owned Small Businesses (SDVOSB) received 1 government contract for \$46,200.
- » Women Owned Small Businesses (WOSB) received 30 contracts for \$4.3 Million.

EMERGING SMALL BUSINESS PROGRAM

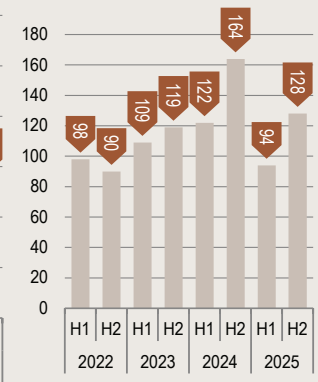
BUSINESSES SOLICITED



BUSINESSES CERTIFIED



CONTRACTS AWARDED



	BUSINESSES CERTIFIED	BUSINESSES SOLICITED	CONTRACTS		
			NUMBER	AMOUNT	AVERAGE
JUL - DEC'22	253	1,047	90	\$6,334,541	\$70,384
JAN - JUN'23	200	1,685	109	\$6,476,987	\$59,422
JUL - DEC'23	224	2,566	119	\$8,003,395	\$67,255
JAN - JUN'24	180	1,241	122	\$9,591,909	\$78,622
JUL - DEC'24	127	961	164	\$7,805,955	\$47,597
JAN - JUN'25	49	1,001	94	\$837,624	\$8,911
JUN - DEC'25	137	1,047	128	\$11,259,133	\$87,962

EMERGING SMALL BUSINESS PROGRAM OVERVIEW

- » The number of Emerging Small Businesses (ESB's) certified in the second half of calendar year 2025 improved by 7.9 percent from the same period last year, and increased by 179.6 percent when compared to the first half of the 2025. The total number of ESBs that have been certified since 2014 now stands at 3,246.
- » The average contract amount in the second half of 2025 was \$87,962; up 887.1 percent from the first half of 2025 and up 84.8 percent from the same time period last year.

NEVADA FILM OFFICE

NEVADA FILM OFFICE

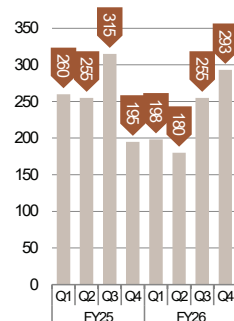
ANNUAL PRODUCTION REVENUE*

FISCAL YEAR	NUMBER OF PRODUCTIONS	REVENUE*
2016	495	\$73,160,712
2017	501	\$40,134,588
2018	333	\$50,066,857
2019	414	\$46,586,786
2020	428	\$33,599,018
2021	360	\$58,013,665
2022	415	\$80,285,024
2023	378	\$90,708,287
2024	440	\$55,104,973
2025	332	\$109,914,953
2026	316	\$77,821,299

*Revenue to Nevada, i.e. local production expenditures.

ASSISTED CLIENTS AND COMPANIES

CLIENTS ASSISTED



In the fourth quarter of Fiscal Year 2026, the Nevada Film Office has fielded questions from 293 clients, 14.9 percent more clients than last quarter.

The Nevada Film Office assists clients with inquiries in areas such as: locations, permitting, crew, tax incentives, production troubleshooting, and more.

SIGNIFICANT PROJECTS* FY2026 Q4

PROJECT	PROJECT TYPE
WWE WrestleMania 42, RAW, SmackDown	TV Series
UFC TUF S34	Reality
Marx	Feature Film
Nevada Wild season 2	Web Series
COSENTYX	Commercial
My Next Guest Needs No Introduction with David Letterman	TV Series
US Bank Commercial	Commercial
Renown	Commercial
CB VIDEO	Music Video
Vanderpump	Commercial

* Each of the projects contributed at least \$250,000 in local production expenditures.

COMMUNITY DEVELOPMENT BLOCK GRANTS

RURAL COMMUNITY DEVELOPMENT BLOCK GRANTS BY PROGRAM YEAR

PROGRAM YEAR	NUMBER OF GRANTS	TOTAL ALLOCATION*	AVERAGE GRANT AWARD	PERCENT ECONOMIC DEVELOPMENT
2018	9	\$2,621,876	\$340,213	70%
2019	8	\$2,666,348	\$334,641	91%
2020	10	\$2,793,254	\$279,325	97%
2021	8	\$2,884,733	\$426,406	79%
2022	14	\$2,735,797	\$223,011	64%
2023	6	\$2,895,399	\$482,567	68%
2024	6	\$2,898,567	\$581,283	76%
2025	9	\$2,910,779	\$363,407	82%

RURAL GRANT PROGRESS, FY2025*

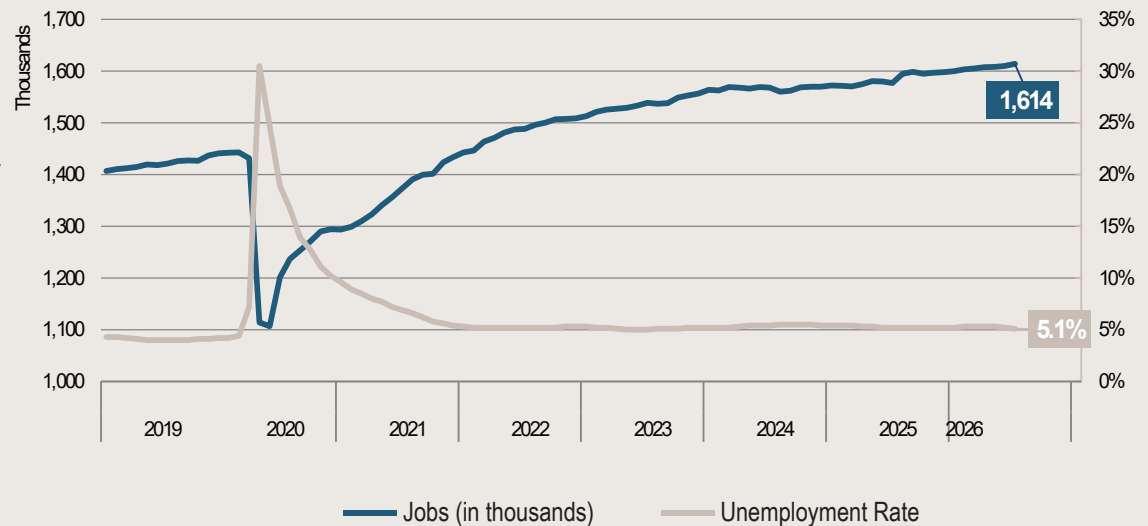
- » In 2025 CDBG awarded 8 grants totaling \$3,071,498 from 7 Rural Communities
- » During the second quarter (April, May, June), \$1,788,952 was reimbursed to 7 communities
- » There are currently 13 open grants. For the standard CDBG program, there is 2 grant from 2023, 4 grants from 2024, 7 grants from 2025.

Notes: Federal Program Year 2025 corresponds to State Fiscal Year 2026 (July 2025 through June 2026). Total Allocation includes HUD allocation as well as recaptured funds from previous years.

NEVADA JOBS AND UNEMPLOYMENT

As of June 2026 Nevada employment stands at 1,614,100 jobs, up about 2.3 percent from a prior year. The most recent figures represent an increase of 170,900 jobs over the pre-pandemic high. Nationally, employment grew just 0.3 percent over the year in June.

Nevada's unemployment rate is 5.1 percent as of June, remaining in the tight range of 5.1 to 5.5 we've experienced for the past 56 months. Despite the elevated unemployment rate compared to the rest of the nation, the BLS heralded Nevada as #1 in job creation marking 11 straight months at the top.



ECONOMIC DEVELOPMENT TARGET SECTORS: REALIZING NEVADA'S ELECTRIC, INNOVATIVE, AND CONNECTED FUTURE

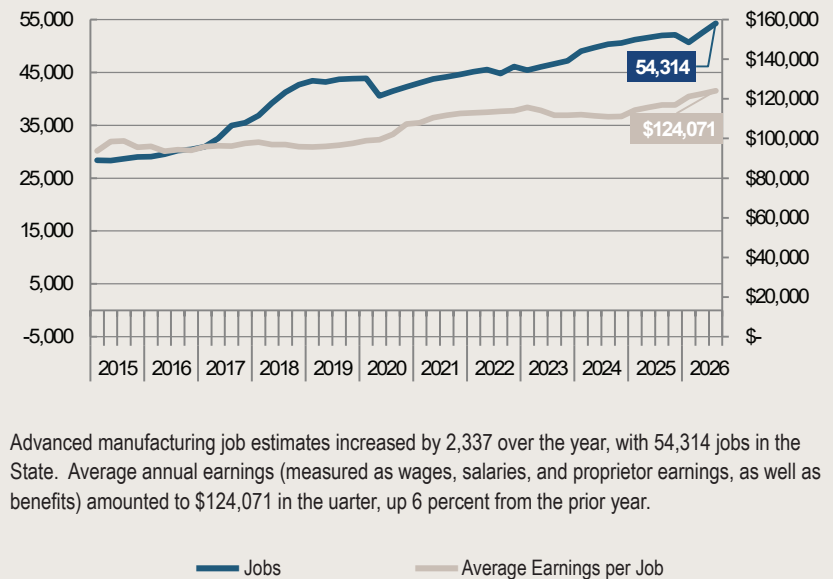
December of 2025 marked two years into the updated 5-Year Comprehensive Economic Development Strategy, titled "Realizing Nevada's Electric, Innovative, and Connected Future". Together with this report, GOED worked with SRI International's Center for Innovation Strategy and Policy to develop updated strategic industry sectors to take Nevada into the future.

Among these are five primary economic development strategic sectors, including apedices of two additional sub-sectors of Healthcare and Water Technologies.

- » Advanced Manufacturing
- » Transportation & Logistics
- » Information Technology
- » Natural Resources & Technology
- » Hospitality, Tourism, Sports, & Creative Industries

For complete review of updates, visit <https://goed.nv.gov/newsroom/state-plans>

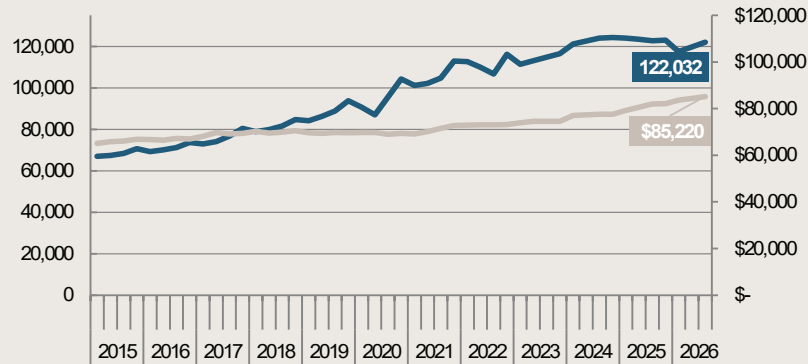
ADVANCED MANUFACTURING



Advanced manufacturing job estimates increased by 2,337 over the year, with 54,314 jobs in the State. Average annual earnings (measured as wages, salaries, and proprietor earnings, as well as benefits) amounted to \$124,071 in the uarter, up 6 percent from the prior year.

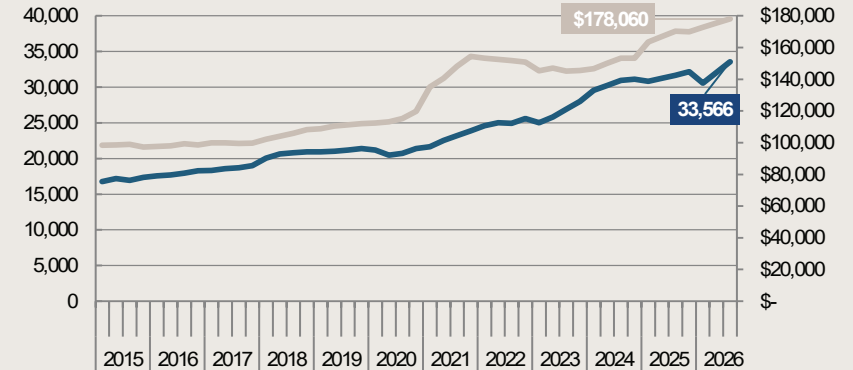
Current industry data are derived from Lightcast's 2026:Q3 estimates. Industry groups are customized and do not equate to Federally-aggregated sectors.

TRANSPORTATION & LOGISTICS



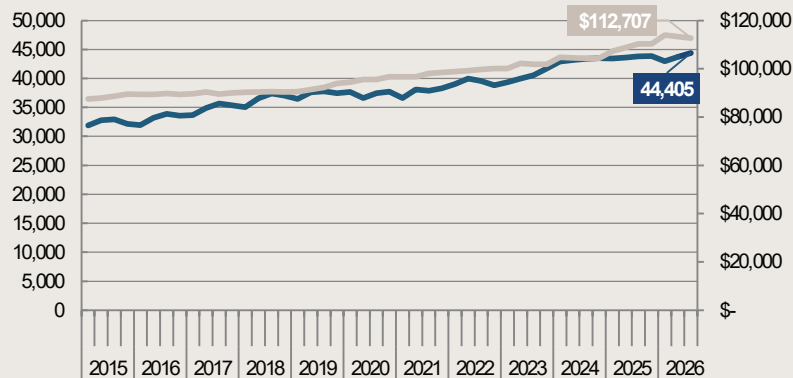
Nevada's transportation and logistics sector has seen a decrease of 0.6 percent, or 758 less jobs over the year for a total employment count of 122,032 in the sector. However, average annual earnings in this sector increased by 3.9 percent over the year to reach \$85,220

INFORMATION TECHNOLOGY



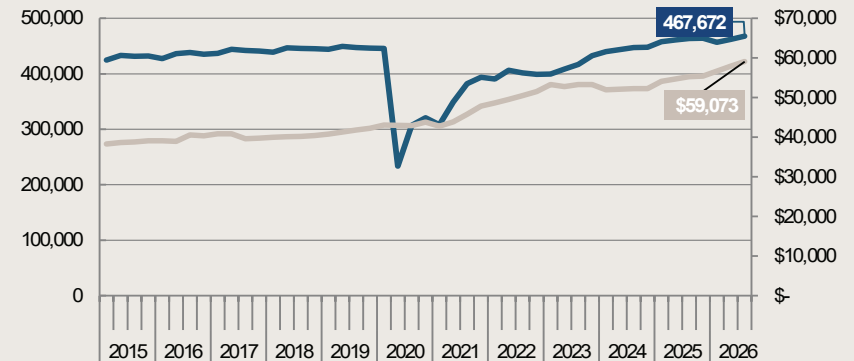
The information technology sector is up 1,917 jobs over the year (an increase of 6 percent) for total employment of 33,566. Average annual earnings were up 4.6 percent over the year and still remain higher than other target sectors, at \$178,060.

NATURAL RESOURCES & TECHNOLOGY



Nevada's natural resources and technology sector increased by 598 jobs over the year to reach 44,405 jobs statewide. That is a modest increase of 1.4 percent year over year. Average annual earnings were down slightly, a 0.6 percent decrease over the year at \$112,707.

HOSPITALITY, TOURISM, SPORTS, & CREATIVE INDUSTRIES



Employment across hospitality, tourism, sports and creative industries is up 3,892 jobs over the year totalling 467,672 jobs. This is up just 0.8 percent from last year. Average annual earnings came in at \$59,073 up about 6.9 percent over the year.