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March 31, 2026

***VIA ELECTRONIC FILING***

Ms. Linda C. Bridwell  
Executive Director  
Kentucky Public Service Commission  
211 Sower Boulevard  
Frankfort, KY 40601

RE: Navitas KY NG, LLC – Unified Gas Cost Recovery  
(PGA) Case No. 2026-00072

Dear Executive Director Bridwell:

Please find enclosed and accept for filing in the above-styled matter Navitas KY NG, LLC's quarterly Purchased Gas Cost Adjustment filing for rates to be effective on May 1, 2026. Also enclosed is a Motion for Confidential Treatment. Contemporaneously with this filing, material subject to the Motion for Confidential Treatment will be submitted to the Commission via email.

Please note the following:

- As part of its PGA filing made December 31, 2025 (Case No. 2025-00405), Navitas indicated its intent to seek a variance with respect to allowed line loss in connection with the current PGA filing. However, Navitas did not experience line loss for the reporting quarter, and thus it will defer requesting a variance until its next PGA filing (June 30, 2026) once further data is obtained.
- Updated information regarding the \$0.24 per Mcf surcharge as approved in Case No. 2019-00430 appears within the Billing Edit Lists as "class" B&W, and updated information regarding the \$6.80 per customer Floyd County customer credit as approved in Case No. 2020-00396 appears within the Billing Edit Lists as "class" REFUND.

- Navitas implemented the residual surcharge of \$4.5000 per Mcf in connection with its billing on or about February 7, 2026 (covering usage in January, 2026). The residual surcharge was also applied to usage in February, 2026. These collections are being included in the 3<sup>rd</sup> previous quarter Balance Adjustment tally (e.g. – the expiring BA). The total of all under/over collections (excluding the preceding bullet points) is summarized in row 1 of the AA BA Ladder workbook of the electronic Excel file included with this submission. As shown the current balance is \$98,306.83 under collected. This is down dramatically from the balance of \$439,806.57 one-year ago and down substantially from the balance of \$305,158.62 just one quarter ago. The dramatic change is attributed to the implementation of the surcharge coupled with one of the most prolonged cold winters in our service history. Due to this dramatic turnaround, Navitas, barring the objection of the Commission, is proposing to suspend the surcharge with immediate effect. In addition to the practical desire not to significantly overshoot the GCA, Navitas has been informed by three major customers (two livestock operations as well as an asphalt plant) that without immediate reductions in pricing they will switch to other energy sources (i.e. – propane or oil).
- Also, note that Navitas included the overcollection true-up of \$5,091.85 from 2020-00396 and 2022-00109 in the expiring BA, which should close out these cases.
- Navitas will provide its normal monthly update on or about the second week of April (as has been recent monthly practice).

In accordance with 807 KAR 5:001, the undersigned certifies that a copy of this Read 1<sup>st</sup> Letter and its enclosures have been electronically transmitted to the Kentucky Public Service Commission on the date first set forth above, and there are currently no parties that the Commission has excused from participation by electronic means.

Please contact me should you have any questions or concerns, and thank you for your assistance with this matter.

Sincerely,

*/s/ M. Evan Buckley*

M. Evan Buckley

Executive Director  
Kentucky Public Service Commission  
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**Certification**

I hereby certify that a copy of this Read1st Letter and its enclosures have been served electronically on all parties of record through the use of the Commission's electronic filing system, and there are currently no parties that the Commission has excused from participation by electronic means. Pursuant to the Commission's July 22, 2021 Order in Case No. 2020-00085, a paper copy of this filing has not been transmitted to the Commission.

/s/ M. Evan Buckley  
M. Evan Buckley

Enclosures