KyPSC Case No. 2026-00222
TABLE OF CONTENTS

DATA REQUEST	WITNESS	TAB NO.
STAFF-DR-01-001	Trisha A. Haemmerle	1
STAFF-DR-01-002	Kash Smith	2
STAFF-DR-01-003	Kash Smith	3
STAFF-DR-01-004	Kash Smith	4
STAFF-DR-01-005	Trisha A. Haemmerle	5
STAFF-DR-01-006	Tyler Dellinger	6
STAFF-DR-01-007	Tyler Dellinger	7
STAFF-DR-01-008	Robert Joe Rice	8
STAFF-DR-01-009	Melissa Adams	9

VERIFICATION

STATE OF NORTH CAROLINA)
) SS:
COUNTY OF Wake **)**

The undersigned, Melissa Adams, Director Analytics, being duly sworn, deposes and says that she has personal knowledge of the matters set forth in the foregoing data requests and that the answers contained therein are true and correct to the best of her knowledge, information, and belief.

Melissa Adams

Melissa Adams, Affiant

Subscribed and sworn to before me by Melissa Adams on this 26 day of October, 2026.

Peggy Holton

NOTARY PUBLIC

PEGGY HOLTON NOTARY PUBLIC WAKE COUNTY, NC

My Commission Expires: 12/22/2026

STATE OF NORTH CAROLINA)
) **SS:**
COUNTY OF MECKLENBURG)

The undersigned, Tyler Dellinger, Lead Products and Services Manager, being duly sworn, deposes and says that he has personal knowledge of the matters set forth in the foregoing data requests, and that the information contained therein is true and correct to the best of his knowledge, information, and belief.

Tyler Dellinger, Affiant

Subscribed and sworn to before me by Tyler Dellinger on this 22nd day of October, 2026.

NOTARY PUBLIC

My Commission Expires: 03-09-2029

Linda M Brittain
NOTARY PUBLIC
Gaston County, NC
My Commission Expires March 09, 2029

VERIFICATION

STATE OF OHIO)
) **SS:**
COUNTY OF HAMILTON)

The undersigned, Trisha A. Haemmerle, Rates and Regulatory Strategy Director, being duly sworn, deposes and says that she has personal knowledge of the matters set forth in the foregoing data requests, and that the answers contained therein are true and correct to the best of her knowledge, information, and belief.

Trisha A. Haemmerle, Affiant

Subscribed and sworn to before me by Trisha A. Haemmerle on this 22nd day of October, 2026.

NOTARY PUBLIC

My Commission Expires:

NOTARIAL SEAL
STATE OF OHIO

ROCCO O. D'ASCENZO
ATTORNEY AT LAW
Notary Public, State of Ohio
My Commission Has No Expiration
Section 147.03 R.C

VERIFICATION

STATE OF INDIANA)
)
COUNTY OF Hendricks) **SS:**

The undersigned, Robert Joe Rice, Senior Products and Services Manager for K-12 Energy Efficiency in Education program, being duly sworn, deposes and says that he has personal knowledge of the matters set forth in the foregoing data requests, and that the information contained therein is true and correct to the best of his knowledge, information, and belief.

Robert Joe Rice, Affiant

Subscribed and sworn to before me by Robert Joe Rice on this 14th day of October, 2026.

NOTARY PUBLIC

AMY MCKENNA
NOTARY PUBLIC
HENDRICKS COUNTY, STATE OF INDIANA
MY COMMISSION EXPIRES SEPTEMBER 21, 2033
COMMISSION NUMBER NP0766012

My Commission Expires: September 21, 2033

VERIFICATION

STATE OF NORTH CAROLINA)
) SS:
COUNTY OF MECKLENBURG)

The undersigned, Kash Smith, Senior Products and Services Manager, being duly sworn, deposes and says that he has personal knowledge of the matters set forth in the foregoing data requests, and that the information contained therein is true and correct to the best of his knowledge, information, and belief.

Kash Smith, Affiant

Subscribed and sworn to before me by Kash Smith on this 14th day of October, 2026.

NOTARY PUBLIC

My Commission Expires: 05/05/2029

MELISSA PEREZ-HERNANDEZ
Notary Public
Mecklenburg County, NC
My Commission Expires May 5, 2029

Duke Energy Kentucky
Case No. 2026-00222
STAFF First Request for Information
Date Received: October 12, 2026

STAFF-DR-01-001

REQUEST:

Refer to the application, pages 2-3. Refer also to Ordering paragraphs 4 and 5 from the April 11, 2013 Order in Case No. 2012-00495.[2]

a. Confirm that it is burdensome for Duke Kentucky to include proposed revisions to its Rider Demand-Side Management Rate (DSMR) in its August 15th annual filing when its annual November filing typically seeks recovery of the changes in the Rider DSMR rates resulting from August 15th annual filing proposals. If confirmed, explain why?

b. Explain whether it would be more efficient for Duke Kentucky to seek cost recovery of the changes requested in the same filing as its August 15th annual filing.

c. Explain whether Duke Kentucky intends to file a November 15th annual filing this year given that there were requests made to modify and add new programs in this application.

d. Provide the calculations and explain whether the proposed Rider DSMR rates included in Exhibits C and D would accurately recover the program changes requested in the application. If not, provide updated Exhibits C and D that reflect the changes requested in the application.

[2] Case No. 2012-00495, Application of Duke Energy Kentucky, Inc. for the Annual Cost Recovery Filing for Demand Side Management (Ky PSC April 11, 2013), Order at 15-16.

RESPONSE:

a. Pursuant to the Commission's Order in Case No. 2012-00495, the August 15 annual filing is required as a separate submission to request program changes and provide EM&V reports.[†]

The timeframe for the November filing allows for adjustments to the upcoming fiscal year's approved portfolio which is July of the year following the filing to June of the subsequent calendar year, as well as a true-up of the previous year's expenses. Thus, for example, the Company's November 2025 filing, in Case No. 2025-00359, requested adjustments for July 2026 to June 2027 and trued-up July 2024 to June 2025 expenses.[‡] On the other hand, the timing of the August filing, means that an Order will likely not issue until November or December of the same year, which in turn means any changes can practically only be implemented for January to June of the year following the filing. Thus, the two filings serve different, non-duplicative functions.

Although the additional filing may create additional administrative burden, it offers the Company a timely opportunity to modify its portfolio. No other process currently allows the Company to request program changes or related budget adjustments. Prior to 2018, the Commission had permitted the Company to utilize a limited automatic approval process for cost-effective pilot programs or cost-effective additions to existing programs with additional costs of $75,000 or less per program.[§] This process has not been in use

---

[†] In the Matter of the Electronic Annual Cost Recovery Filing for Demand Side Management by Duke Energy Kentucky, Inc., Case No. 2021-00495, Order, pp. 15-16 (Ky.P.S.C. April 11, 2013)

[‡] *In the Matter of the Electronic Annual Cost Recovery Filing for Demand Side Management by Duke Energy Kentucky, Inc.*, Case No. 2025-00359, Order, p. 5 (Ky. P.S.C. Mar. 23, 2026) ("Duke Kentucky's DSM revenue requirement, including projected July 1, 2026, through June 30, 2027, program costs, lost revenues, and shared savings is approximately $ 16.228 million."); *id.*, Application, p. 3 ("This Application, filed November 3, 2025, serves as the annual true-up of the fiscal year ending June 30, 2025, of programs.").

[§] See Application of Duke Energy Kentucky, Inc. For an Energy Efficiency Cost Recovery Mechanism and For Approval of Additional Programs For Inclusion in Its Existing Portfolio, Case No. 2012-00085, Order,

since 2018.[**] If the Commission prefers to have only a single annual filing, reinstating this limited automatic approval process could offer a helpful balance in maintaining some amount of flexibility for minor program change requests.

b. The Company currently includes a request for cost recovery of the changes requested in its August 15th annual filing, but this request is only for a January to July period. However, for the reasons given in the response to part a above, the Company also needs to make a November filing. The Company would request that the annual cost recovery filing for demand side management continue to be due annually on November 1st.

c. Duke Energy Kentucky intends to file the Annual Cost Recovery Filing for Demand Side Management on November 2, 2026. The Commission ordered in Case No. 2023-00354 that the annual filing change from November 15 to November 1 to allow the Commission adequate time to review Duke Kentucky's annual filings and issue a final order.[††]

d. The Exhibits C and D accurately reflect the changes requested in the application. The period for these changes is January 1, 2027 to June 30, 2027.

PERSON RESPONSIBLE: Trisha Haemmerle

---

pp. 22-23 (Ky. P.S.C. June 29, 2012) (approving a limited automatic approval process for pilot programs with total costs of $75,000 or less and other limits, subject to a 10-day notification); In the Matter of the Electronic Application of Duke Energy Kentucky, Inc. to Amend Its Demand-Side Management Programs, Case No. 2014-00280, Order, p. 19 (Ky. P.S.C. Jan. 28, 2015) (approving use of the automatic approval process to cover cost-effective additions (measures) to existing approved DSM programs where costs do not exceed $75,000 per program).

[**] In its February 14, 2018, Order in Case No. 2017-00427, the Commission suspended all non-low-income programs. The suspension was lifted on September 13, 2018, reinstating most of the programs but did not reinstate the automatic approval process.

[††] Since November 1, 2026 is a Sunday, this Application is being filed on the next day that is not a Saturday, Sunday, or legal holiday. See 807 KAR 5:001, Section 4(7)(b).

Duke Energy Kentucky
Case No. 2026-00222
STAFF First Request for Information
Date Received: October 12, 2026

STAFF-DR-01-002

REQUEST:

Refer to the application, page 5. Explain in detail how the requested additional funding of $163,800 will ensure that Duke Kentucky's Income Qualified Neighborhood Energy Saver (IQNES) program operates on par with the level of participation already authorized.

RESPONSE:

The requested $163,800 in additional funding is intended to address increased costs associated with delivering the IQNES Program to the authorized number of participants. The request does not seek to increase participation or expand the Program beyond its existing scope. The additional funding will ensure that available program resources remain sufficient to support continued delivery of energy-efficiency measures and related implementation services.

The primary basis for this request is the increase in market costs for materials necessary to deliver the program. Duke Energy has undertaken multiple contract negotiations and transitioned vendors, where appropriate, to manage these increases and maintain competitive pricing. Despite these efforts, material costs have continued to rise in recent years.

IQNES 2.0 costs have increased by an average of approximately 81%, reflecting higher costs associated with program measures and implementation. These increases place additional pressure on the existing budget and affect the cost of serving each customer participating. The requested funding will help absorb these higher costs so Duke Kentucky

can continue providing eligible customers with energy-efficiency improvements that reduce energy usage and support the Program's energy-savings objectives.

Please also see the Company's response to STAFF-DR-01-003, describing and explaining differences between the prior-year and current-year pricing.

PERSON RESPONSIBLE: Kash Smith

Duke Energy Kentucky
Case No. 2026-00222
STAFF First Request for Information
Date Received: October 12 2026

STAFF-DR-01-003

REQUEST:

Refer to the application, page 5. Provide any quantifiable evidence of the "upward pressure" on material and implementation costs for the IQNES Program.

RESPONSE:

The IQNES Program requires funding for both the energy-efficiency measures provided to participating customers and the services necessary to implement those measures. The Program has experienced significant increases in material and implementation costs for measures such as air sealing, attic insulation, and duct sealing. These increases have raised the overall cost of serving participating customers and placed additional pressure on the existing IQNES budget. The requested additional funding is intended to address these higher costs while maintaining the authorized participation level.

The magnitude of the increases reflected in the IQNES pricing comparison should not be interpreted as an 80 percent or greater increase in the nationwide market price of insulation materials over a single year. First, the prior-year pricing was pursuant to an earlier contract, which had been in place for three years and has now expired. Second, the differences between prior-year and current-year program pricing include the costs associated with delivering and installing the measures. Available national market data indicates that fiberglass insulation costs have experienced inflationary pressure, but at levels substantially below some of the increases reflected in IQNES installed-measure pricing. Accordingly, the larger variances reflect program-specific pricing differences and

changes in the cost of delivering the measures, as well as the establishment of a new contract upon the expiration of an earlier one.

Example IQNES Measure Cost Increases

The IQNES comparison below depicts prior-year and current-year pricing for a sample of measures as additional quantifiable evidence of these cost increases.

Measure	Prior Year	Current Year	Variance Amount	Increase
Attic insulation: less than 5 inches to R38	$1.21/sq. ft.	$2.43/sq. ft.	$1.22	100.8%
Attic insulation:5-10 inches to R38	$1.13/sq. ft.	$2.12/sq. ft.	$0.99	87.6%
Atti insulation:11-19 inches to R38	$0.96/sq. ft.	$1.75/sq. ft.	$0.79	82.3%
Duct sealing per HVAC unit	$255.38	$357.15	$101.77	39.9%
Duct blaster test	$119.22	$496.48	$377.26	316.4%
Mobile home attic insulation	$1.37/sq. ft.	$1.40/sq. ft.	$0.03	2.2%
Mobile home floor/belly insulation	$2.05/sq. ft.	$2.45/sq. ft.	$0.40	19.5%
Mobile home duct sealing per HVAC unit	$255.38	$357.15	$101.77	39.9%

PERSON RESPONSIBLE: Kash Smith

Duke Energy Kentucky
Case No. 2026-00222
STAFF First Request for Information
Date Received: October 12, 2026

PUBLIC STAFF-DR-01-004

REQUEST:

Refer to the application, page 5.

a. Explain whether a request for proposal (RFP) was issued for the selection of new IQNES vendors. If so, provide a copy of the RFP and respondents.

b. Identify the vendor chosen for IQNES.

RESPONSE:

CONFIDENTIAL PROPRIETARY TRADE SECRET

a. Duke Energy Kentucky conducted a competitive procurement process for implementation of the Income Qualified Neighborhood Energy Saver Program. Duke Energy selected four qualified vendors, [redacted], to receive the Request for Proposal and submit bids. There were two respondents: [redacted] and [redacted] responded to the request to submit a bid and provided the required proposal documentation for consideration. Duke Energy reviewed the documentation submitted by both respondents and evaluated each proposal against the requirements and criteria established in the Request for Proposal. Please see STAFF-DR-01-004 Confidential Attachments 1 through 6, which collectively comprise the RFP for the IQNES program and were provided to the four qualified vendors listed above, along with certain generally applicable Company policies

b. Following a comprehensive review and evaluation of the proposals received, Duke Energy Kentucky selected [redacted] to serve as the Program's implementation vendor.

PERSON RESPONSIBLE: Kash Smith

CONFIDENTIAL PROPRIETARY TRADE SECRET

CONFIDENTIAL ATTACHMENT
STAFF DR-01-004 Attachment 1

FILED UNDER SEAL

CONFIDENTIAL PROPRIETARY TRADE SECRET

CONFIDENTIAL ATTACHMENT
STAFF DR-01-004 Attachment 2

FILED UNDER SEAL

CONFIDENTIAL PROPRIETARY TRADE SECRET

CONFIDENTIAL ATTACHMENT
STAFF DR-01-004 Attachment 3

FILED UNDER SEAL

CONFIDENTIAL PROPRIETARY TRADE SECRET

CONFIDENTIAL ATTACHMENT
STAFF DR-01-004 Attachment 4

FILED UNDER SEAL

CONFIDENTIAL PROPRIETARY TRADE SECRET

CONFIDENTIAL ATTACHMENT
STAFF DR-01-004 Attachment 5

FILED UNDER SEAL

CONFIDENTIAL PROPRIETARY TRADE SECRET

CONFIDENTIAL ATTACHMENT
STAFF DR-01-004 Attachment 6

FILED UNDER SEAL

Duke Energy Kentucky
Case No. 2026-00222
STAFF First Request for Information
Date Received: October 12 2026

STAFF-DR-01-005

REQUEST:

Refer to the application, page 7. Explain in detail the circumstances which are causing the Power Manager for Business program to be discontinued. Explain what Duke Kentucky means by the "minimal savings" that led to the discontinuance of the program.

RESPONSE:

Duke Energy Kentucky received the Commission's approval to offer the Power Manager for Business program on January 24, 2017, in Case No. 2016-00289.[1] Participation did not begin until 2017. During the 2017–18 program year, 40 accounts enrolled, and installations were completed at 16 locations using 25 devices—18 thermostats and seven switches. This resulted in 54 kW savings. Due to the minimal participation and low savings impacts, the program was not cost effective with a TRC of 0.32, resulting in the program being discontinued.[2]

PERSON RESPONSIBLE: Trisha Haemmerle

[1] *In the Matter of the Electronic Application of Duke Energy Kentucky, Inc. to Amend its Demand Side Management Programs*, Case No. 2016-00289, Order, pp. 10-11, 14 (Ky. P.S.C. Jan. 24, 2017).
[2] *See In the Matter of the Electronic Annual Cost Recovery Filing for Demand Side Management by Duke Energy Kentucky, Inc.,* Case No. 2018-00370, Filing of the Annual Status Report, Adjustment of the DSM Cost Recovery Mechanism, and Amended Tariff Sheets for Gas Rider DSMR (Sheet No. 62) and Electric Rider DSMR (Revised Sheet No. 78), p. 45 ("During the 2017-18 Program year, the Program enrolled 40 accounts and completed installation at 16 of those locations with 25 devices. The 25 devices include 18 thermostats and 7 switches. Due to the minimal savings from the program, the program will not continue beyond 2018.") (Ky. P.S.C. Nov. 15, 2018); *id.*, Order, p. 12 (Ky P.S.C. Oct. 2, 2019) ("Duke Kentucky's DSM programs and associated costs as originally filed and as modified in the findings above to revise the costs allocated to gas customers are approved on and after the date of this Order.").

Duke Energy Kentucky
Case No. 2026-00222
STAFF First Request for Information
Date Received: October 12, 2026

STAFF-DR-01-006

REQUEST:

Refer to the application, page 7. Explain why Duke Kentucky is only proposing to implement the Bring Your Own KW option in this case and whether any additional measures will be proposed in future filings.

RESPONSE:

Duke Energy proposes to implement Bring Your Own kW to provide small and medium-sized business customers with a more accessible means of participating in Demand Response by reducing the minimum participation threshold.

Many customers currently possess eligible equipment, including smart thermostats, energy management systems, and building management systems (EMS/BMS), that may be used to reduce energy consumption without requiring additional equipment installation.

The offering is also expected to reduce ongoing maintenance and administrative expenses by limiting program overhead and avoiding material costs. These efficiencies support the delivery of additional customer benefits while maintaining program cost-effectiveness.

Duke Energy Kentucky will continue to evaluate the opportunity to add cost effective incentivized measures suitable for the business market through the program.

PERSON RESPONSIBLE: Tyler Dellinger

Duke Energy Kentucky
Case No. 2026-00222
STAFF First Request for Information
Date Received: October 12 2026

STAFF-DR-01-007

REQUEST:

Refer to the application, pages 6–9. Explain how the proposed Power Manager for Business program differs from the previously discontinued program of the same name.

RESPONSE:

The proposed PowerManager for Business program differs from the previously discontinued program primarily in the participation offering. The prior program was thermostat-based, with the Company installing and maintaining a smart thermostat for each participating customer. In contrast, Bring Your Own kW is a voluntary offering that enables customers to participate in Demand Response using their existing capabilities to reduce energy consumption.

Customers may participate through behavioral or automated load-control methods. Automated methods may include commercially available energy management systems, building management systems (EMS/BMS), and smart thermostats. Such systems may communicate through Open Automated Demand Response (OpenADR or OADR), a standardized protocol that enables equipment to receive and respond to Demand Response signals. Customers without automated capabilities may participate by manually adjusting their energy use.

The offering is designed to provide non-residential customers with a pathway to participate in Demand Response without requiring specific prerequisite hardware. By

accommodating multiple methods of load reduction, Bring Your Own kW is intended to expand customer access and reduce barriers to participation.

PERSON RESPONSIBLE: Tyler Dellinger

Duke Energy Kentucky
Case No. 2026-00222
STAFF First Request for Information
Date Received: October 12 2026

STAFF-DR-01-008

REQUEST:

Refer to the application, pages 9 through 11. Explain whether Duke Kentucky has been able to identify energy savings associated with the Energy Efficiency Education program.

RESPONSE:

The Energy Efficiency in Education Program's first theatrical performance in Kentucky was held on April 10, 2026. During the final months of the 2025/2026 school year, the program's implementation vendor delivered performances at seven schools, reaching an estimated 1,855 students. Through September 30, 2026, 242 energy efficiency kits were distributed to participating Kentucky households representing an estimated 109,000 kWh in net savings.

PERSON RESPONSIBLE: Robert Rice

Duke Energy Kentucky
Case No. 2026-00222
STAFF First Request for Information
Date Received: October 12 2026

STAFF-DR-01-009

REQUEST:

Refer to the application, Exhibit C. Provide the exhibit in Excel spreadsheet format with all formulas, rows, and columns unprotected and fully accessible.

RESPONSE:

Please see STAFF-DR-01-009 Attachment.

PERSON RESPONSIBLE: Melissa Adams

Kentucky DSM Rider
Comparison of Revenue Requirement to Rider Recovery
2024-2025 Status Update

Residential Programs	(1) Projected Program Costs 7/2024 to 6/2025 (A)	(2) Projected Lost Revenues 7/2024 to 6/2025 (A)	(3) Projected Shared Savings 7/2024 to 6/2025 (A)	(4) Program Expenditures 7/2024 to 6/2025 (B)	(5) Program Expenditures (C) Gas	(6) Program Expenditures (C) Electric	(7) Lost Revenues 7/2024 to 6/2025 (B)	(8) Shared Savings 7/2024 to 6/2025 (B)	(9) 2024 Reconciliation Gas (D)	(10) 2024 Reconciliation Electric (D)	(11) Rider Collection (E) Gas	(12) Rider Collection (E) Electric	(13) (Over)/Under Collection Gas (F)	(14) (Over)/Under Collection Electric (G)
Income Qualified Neighborhood	$ 534,292	$ 31,541	$ (20,759)	$ 456,409	$ -	$ 456,409	$ 34,637	$ (17,478)						
Income Qualified Services	$ 748,255	$ 12,001	$ (40,116)	$ 788,557	$ 333,524	$ 455,032	$ 14,682	$ (37,434)						
Home Energy Report	$ 442,331	$ 741,075	$ 65,215	$ 359,658	$ -	$ 359,658	$ 959,137	$ 68,157						
Residential Energy Assessments	$ 322,136	$ 50,042	$ 24,047	$ 207,160	$ -	$ 207,160	$ 56,034	$ 24,592						
Residential Smart $aver®	$ 648,458	$ 88,164	$ 22,748	$ 569,094	$ -	$ 569,094	$ 87,606	$ 28,496						
Power Manager®	$ 2,038,578	$ -	$ 46,463	$ 1,853,640	$ -	$ 1,853,640	$ -	$ 76,506						
Peak Time Rebate Pilot Program	$ 428,999	$ -	$ -	$ 156,768	$ -	$ 156,768	$ -							
Revenues collected											($401,907)	$2,553,900		
Total	$ 5,163,049	$ 922,822	$ 97,599	$ 4,391,286	$ 333,524	$ 4,057,762	$ 1,152,096	$ 142,838	$ (242,159)	$ (4,196,402)	$ (401,907)	$ 2,553,900	$ 493,272	$ (1,397,605)

(A) Amounts identified in report filed in Case No. 2024-00264
(B) Actual program expenditures, lost revenues (for this period and from prior period DSM measure installations), and shared savings for the period July 1, 2024 through June 30, 2025
(C) Allocation of program expenditures to gas and electric in accordance with the Commission's Order in Case No. 2014-00388
(D) Recovery allowed in accordance with the Commission's Order in Case No. 2024-00352
(E) Revenues collected through the DSM Rider between July 1, 2024 and June 30, 2025
(F) Column (5) + Column (9) - Column(11)
(G) Column (6) + Column (7) + Column (8) + Column (10) - Column(12)

Commercial Programs	(1) Projected Program Costs 7/2024 to 6/2025 (A)	(2) Projected Lost Revenues 7/2024 to 6/2025 (A)	(3) Projected Shared Savings 7/2024 to 6/2025 (A)	(4) Program Expenditures 7/2024 to 6/2025 (B)	(5) Lost Revenues 7/2024 to 6/2025 (B)	(6) Shared Savings 7/2024 to 6/2025 (B)	(7) 2024 Reconciliation (C)	(8) Rider Collection (D)	(9) (Over)/Under Collection (E)
Business Energy Saver	$ 1,070,184	$ 128,985	$ 175,543	$ 1,922,887	$ 217,667	$ 732,813			
Smart $aver® Non-Residential	$ 2,286,676	$ 330,875	$ 339,287	$ 1,117,757	$ 216,548	$ 228,426			
Total	$ 3,356,859	$ 459,860	$ 514,830	$ 3,040,644	$ 434,214	$ 961,239	$ (93,896)	$ 6,955,814	$ (2,613,613)
PowerShare®	$ 801,600	$ -	$ 77,572	$ 660,457	$ -	$ 84,060	$ 115,873	$ 1,544,077	$ (683,687)
Total All Programs	$ 9,321,509	$ 1,382,683	$ 690,001	$ 8,092,387	$ 1,586,311	$ 1,188,138			

(A) Amounts identified in report filed in Case No. 2024-00264
(B) Actual program expenditures, lost revenues (for this period and from prior period DSM measure installations), and shared savings for the period July 1, 2024 through June 30, 2025
(C) Recovery allowed in accordance with the Commission's Order in Case No. 2024-00352
(D) Revenues collected through the DSM Rider between July 1, 2024 and June 30, 2025
(E) Column (4) + Column (5) + Column (6) + Column (7) - Column(8)

Kentucky DSM Rider

2026-2027 Projected Program Costs, Lost Revenues, and Shared Savings
*as amanded 8/14/2026

Residential Program Summary (A)

	Costs	Lost Revenues	Shared Savings	Total	Allocation of Costs (B) Electric	Allocation of Costs (B) Gas	Budget (Costs, Lost Revenues, & Shared Savings) Electric Costs	Budget (Costs, Lost Revenues, & Shared Savings) Electric	Budget (Costs, Lost Revenues, & Shared Savings) Gas Costs
Energy Efficiency in Education Program	$ 153,493	$ 30,039	$ 101,731	$ 285,263	100.0%	0.0%	$ 153,493	$ 285,263	$ -
Income Qualified Neighborhood	$ 818,478	$ 121,220	$ 27,727	$ 967,425	100.0%	0.0%	$ 818,478	$ 967,425	$ -
Income Qualified Services	$ 737,986	$ 39,499	$ (5,108)	$ 772,377	49.6%	50.4%	$ 366,039	$ 400,430	$ 371,947
Home Energy Report	$ 497,961	$ 881,540	$ 315,208	$ 1,694,708	100.0%	0.0%	$ 497,961	$ 1,694,708	$ -
Residential Energy Assessments	$ 348,650	$ 208,617	$ 116,042	$ 673,310	100.0%	0.0%	$ 348,650	$ 673,310	$ -
Residential Smart $aver®	$ 965,796	$ 261,982	$ 192,191	$ 1,419,969	100.0%	0.0%	$ 965,796	$ 1,419,969	$ -
Power Manager®	$ 2,501,926	$ -	$ 1,806,549	$ 4,308,475	100.0%	0.0%	$ 2,501,926	$ 4,308,475	$ -
Peak Time Rebate Pilot Program	$ 201,913	$ -	$ -	$ 201,913	100.0%	0.0%	$ 201,913	$ 201,913	$ -
Total Costs, Net Lost Revenues, Shared Savings	$ 6,226,204	$ 1,542,897	$ 2,554,340	$ 10,323,440			$ 5,854,257	$ 9,951,493	$ 371,947

NonResidential Program Summary (A)

	Costs	Lost Revenues	Shared Savings	Total	Allocation of Costs (B) Electric	Allocation of Costs (B) Gas	Budget (Costs, Lost Revenues, & Shared Savings) Electric Costs	Budget (Costs, Lost Revenues, & Shared Savings) Electric	Budget (Costs, Lost Revenues, & Shared Savings) Gas
Business Energy Saver (C)	$ 1,187,273	$ 783,885	$ 588,133	$ 2,559,291	100.0%	0.0%	$ 1,187,273	$ 2,559,291	NA
Smart $aver® Non-Residential	$ 1,241,196	$ 518,838	$ 889,288	$ 2,649,322	100.0%	0.0%	$ 1,241,196	$ 2,649,322	NA
Power Manager® for Business	$ 85,864	$ -	$ 5,201	$ 91,065	100.0%	0.0%	$ 85,864	$ 91,065	NA
PowerShare®	$ 630,681	$ -	$ 212,731	$ 843,411	100.0%	0.0%	$ 630,681	$ 843,411	NA
Total Costs, Net Lost Revenues, Shared Savings	$ 3,145,013	$ 1,302,723	$ 1,695,353	$ 6,143,089			$ 3,145,013	$ 6,143,089	NA
Total Program	$ 9,371,217	$ 2,845,620	$ 4,249,692	$ 16,466,529					

(A) Costs, Lost Revenues (for this period and from prior period DSM measure installations), and Shared Savings for the portfolio.
(B) Allocation of program expenditures to gas and electric in accordance with the Commission's Order in Case No. 2014-00388.
(C) Small Business Energy Saver and SmartPath are indiviual sets of measures that are part of a single and larger program referred to as Business Energy Saver beginning July 1, 2023.

Duke Energy Kentucky
Demand Side Management Cost Recovery Rider (DSMR)
Summary of Calculations for Programs

July 2026 to June 2027

		Program Costs (A)
Electric Rider DSM		
Residential Rate RS	$	9,951,493
Distribution Level Rates Part A		
DS, DP, DT, GS-FL, EH & SP	$	5,299,678
Transmission Level Rates & Distribution Level Rates Part B	$	843,411
Gas Rider DSM		
Residential Rate RS	$	371,947

(A) See Appendix C, page 2 of 7

Duke Energy Kentucky
Demand Side Management Cost Recovery Rider (DSMR)
Summary of Billing Determinants

Year	July 2026 - June 2027
Projected Annual Electric Sales kWH	
Rate RS	1,512,856,770
Rates DS, DP, DT, GS-FL, EH, & SP	2,248,044,740
Rates DS, DP, DT, GS-FL, EH, SP, & TT	2,433,827,740
Projected Annual Gas Sales CCF	
Rate RS	61,478,656

Duke Energy Kentucky
Demand Side Management Cost Recovery Rider (DSMR)
Summary of Calculations

July 2024 to June 2025

Rate Schedule Riders	True-Up Amount (A)	Expected Program Costs (B)	Total DSM Revenue Requirements	Estimated Billing Determinants (C)		DSM Cost Recovery Rider (DSMR)	
Electric Rider DSM							
Residential Rate RS	$ (1,461,476)	$ 9,951,493	$ 8,490,017	1,512,856,770	kWh	$ 0.005612	$/kWh
Distribution Level Rates Part A							
DS, DP, DT, GS-FL, EH & SP	$ (2,733,055)	$ 5,299,678	$ 2,566,623	2,248,044,740	kWh	$ 0.001142	$/kWh
Transmission Level Rates & Distribution Level Rates Part B							
TT	$ (714,931)	$ 843,411	$ 128,480	2,433,827,740	kWh	$ 0.000053	$/kWh
Distribution Level Rates Total							
DS, DP, DT, GS-FL, EH & SP						$ 0.001195	$/kWh
Gas Rider DSM							
Residential Rate RS	$ 515,814	$ 371,947	$ 887,761	61,478,656	CCF	$ 0.014440	$/CCF
Total Rider Recovery			$ 12,072,882				

(A) (Over)/Under of Appendix C page 1 multiplied by the average three-month commercial paper rate for 2025 to include interest on over or under-recovery in accordance with the Commission's order in Case No. 95-312. Value is: **1.045700**
(B) Appendix C, page 2
(C) Appendix C, page 4

Summary of Load Impacts July 2024 Through June 2025 (1)

Residential Programs	kWh	% of Total Res Sales	ccf	% of Total Res Sales	Allocation Factors based on July 2024-June 2025: Elec % of Total % of Sales	Gas % of Total % of Sales
Income Qualified Neighborhood	625,676	0.0409%	-	0.0000%	100%	0%
Income Qualified Services	222,494	0.0146%	5,640	0.0107%	57.70%	42.30%
Home Energy Report	12,138,294	0.7942%	-	0.0000%	100%	0%
Residential Energy Assessments	1,040,625	0.0681%	-	0.0000%	100%	0%
Residential Smart $aver®	1,243,683	0.0814%	-	0.0000%	100%	0%
Power Manager®	-	0.0000%	-	0.0000%	100%	0%
Peak Time Rebate Pilot Program	-	0.0000%	-	0.0000%	100%	0%
Total Residential	15,270,772	0.9991%	5,640	0.0107%		
Total Residential (Rate RS) Sales For July 2024 Through June 2025	1,528,435,329	100%	52,858,356	100%		

(1) Load Impacts Net of Free Riders at Meter

Summary of Load Impacts July 2026 Through June 2027 (1)

Residential Programs	kWh	% of Total Res Sales	ccf	% of Total Res Sales	Allocation Factors Projected Elec % of Total % of Sales	Gas % of Total % of Sales
Energy Efficiency in Education Program	739,116	0.0489%	-	0.0000%	100%	0%
Income Qualified Neighborhood	655,428	0.0433%	-	0.0000%	100%	0%
Income Qualified Services	139,616	0.0092%	5,765	0.0094%	49.6%	50.4%
Home Energy Report	11,771,223	0.7781%	-	0.0000%	100%	0%
Residential Energy Assessments	851,773	0.0563%	-	0.0000%	100%	0%
Residential Smart $aver®	1,271,740	0.0841%	-	0.0000%	100%	0%
Power Manager®	-	0.0000%	-	0.0000%	0%	0%
Total Residential	15,428,897	0.9710%	5,765	0.0094%		
Total Residential (Rate RS) Sales Projected	1,512,856,770	100%	61,478,656	100%		

(1)Load Impacts Net of Free Riders at Meter