CORPORATE PRESENTATION

2015

GAMELOFT

ABOUT DIGITAL GAMING

Digital gaming is everywhere

Smartphones & Tablets

Feature phones

TVs & STBs

- A growing installed base : **1.9 billion smartphones** (+4% YoY) and **273 million tablets** (+8% YoY) are expected to ship in 2015*
- More than 1 billion people will use a tablet in 2015, representing 15% of world population*
- Mobile gaming revenues are expected to reach US$15bn in 2018, growing at a CAGR of 9.6%**
- Advertisers will spend **$64.5 billions on mobile phones in 2015** (+60% YoY)***

* Source: Gartner – Oct 2014 ** PWC Global Entertainment and Media outlook 2014-2018 ***eMarketer – Jan 2015

A fragmented industry

Gameloft develops its games on 4500 smartphone & 350 feature phone models in 15 languages and on multiple operating systems (iOS, Android, WP8, etc.)

Flood of 50-100 smartphones & tablets

Green Farm on Yuan Dao Dual Core Android Tablet

Danger Dash on Gionee Dual Core Android Smartphone

Average smartphone retail price expected at 297$ in 2014 vs. 345$ in 2013*

* Source: Consumer Electronic Association – January 2014

ABOUT GAMELOFT

Competitive advantages

- All Gameloft games are developed in-house. World class product development and deployment on smartphones, feature phones, tablets, smart TVs and set-top boxes. Quality comes first.

- 700 million Gameloft games were downloaded in 2014 on the AppStore and Google Play. Gameloft was the #1 publisher on iOS and the #2 on Google Play by downloads according to App Annie's 2014 worldwide index for games.

- Our 28 studios are spread all over the world in America, Europe and Asia, allowing Gameloft to benefit from cultural diversity and competitive development costs.

- Gameloft releases ~20 smartphone and tablet games every year thanks to its 5 200 developers.

- Unique portfolio of in-house franchises and third party IPs.

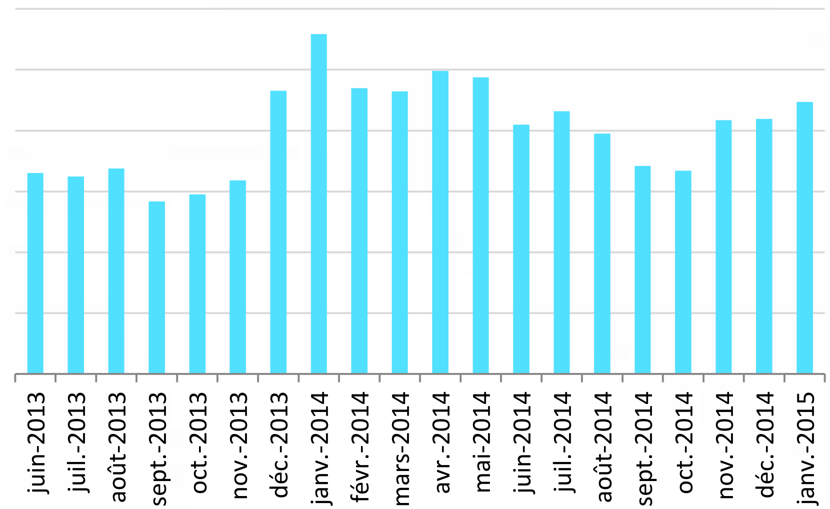
- Unique worldwide network of sales, marketing and PR people.

- Partnerships with all major digital stores and social networks: App Store, Google Play, Amazon, Microsoft Market Place, etc. and direct agreements including billing agreements with over 200 carriers in more than 80 countries.

Time extended! (1/2)

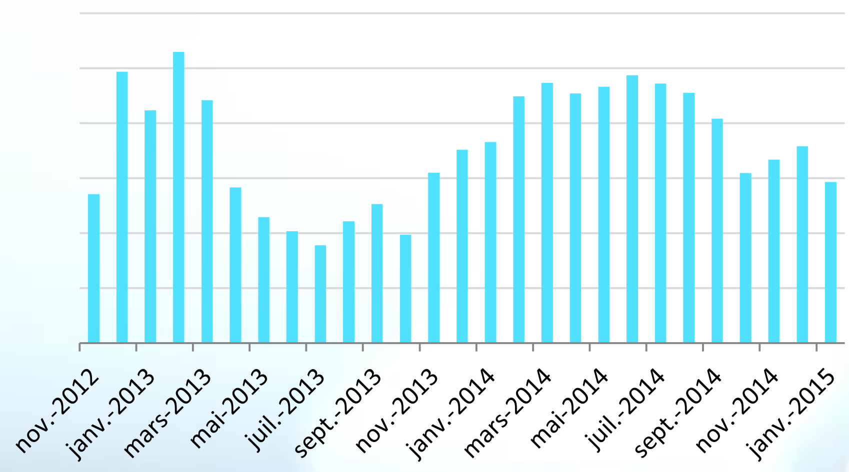
Order & Chaos Online – monthly sales since launch

Uno & Friends – monthly sales since launch



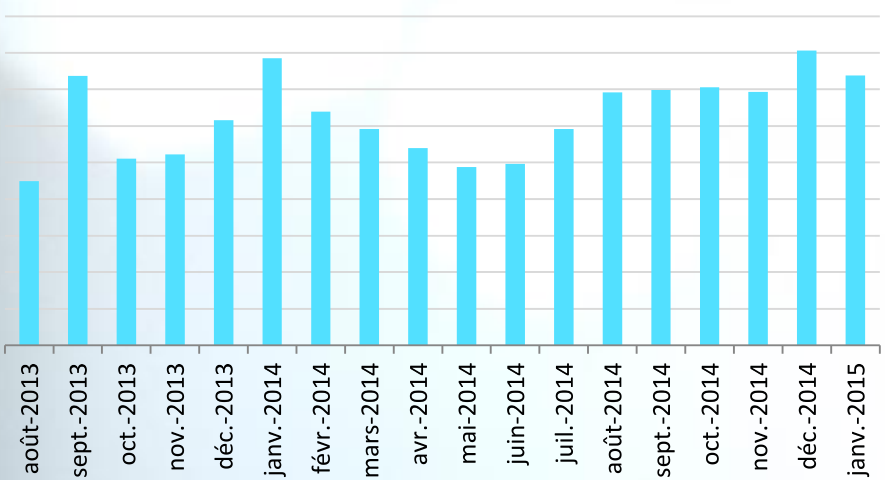
Despicable Me 2 – monthly sales since launch

World at Arms – monthly sales since launch

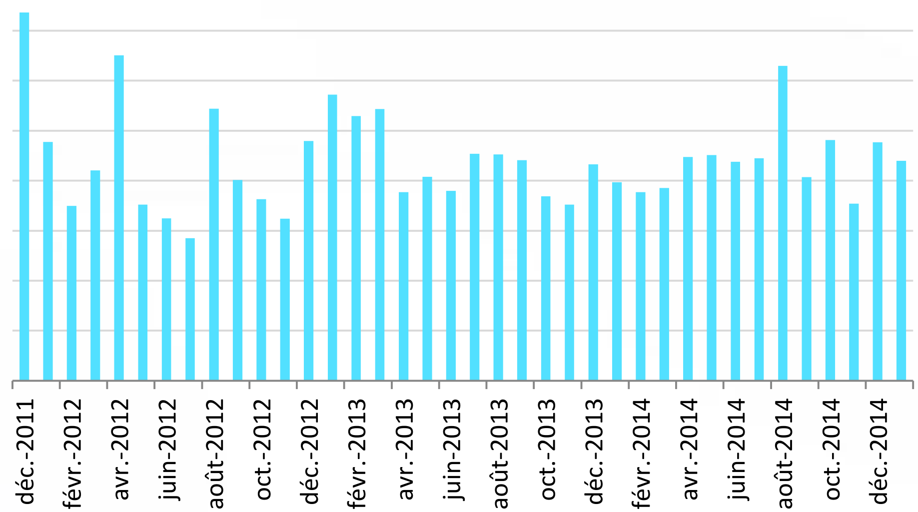


Time extended! (2/2)

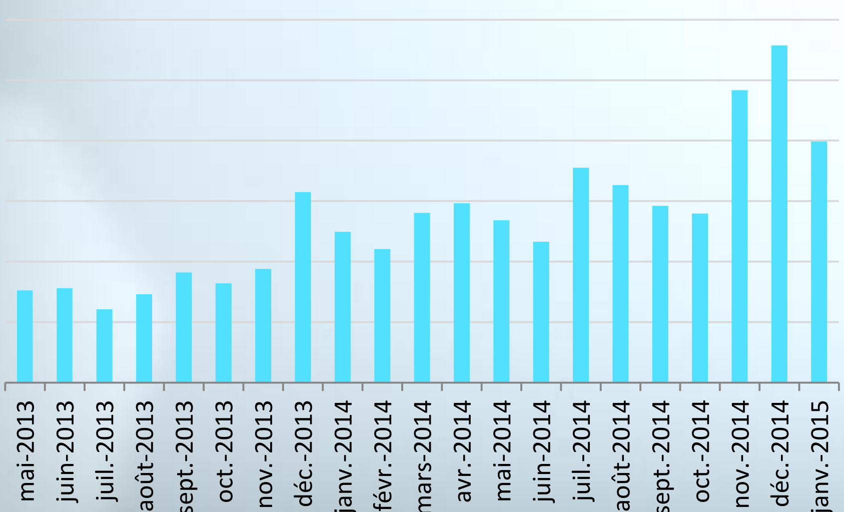
Asphalt 8 – monthly sales since launch



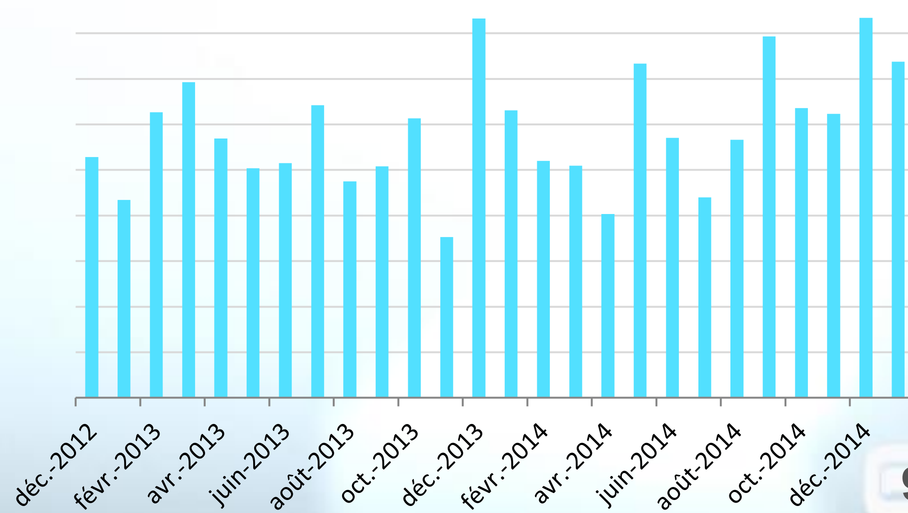
Six Guns – monthly sales since launch



Blitz Brigade – monthly sales since launch



Heroes of Order & Chaos – monthly sales since launch



The #1 game catalogue

Strong in house franchises

World at Arms
Asphalt 8 Airborne
Blitz Brigade
Gangstar Vegas
Pastry Paradise
Total Conquest
Dungeon Hunter 4
Six-Guns
Puzzle Pets
Dragon Mania Legends
Order & Chaos Online
Modern Combat 5 Blackout

Third party IPs

Despicable Me Minion Rush
The Amazing Spider-Man 2
Brothers in Arms 3 Sons of War
UNO & Friends
Ice Age Adventures
My Little Pony
Disney · Pixar Cars Fast as Lightning
Marvel Spider-Man Unlimited
Iron Man 3 The Official Game
NFL Pro 2014

Top rated games

★★★★ Action GAMELOFT

Spider-Man Unlimited featured in one of the most popular magazine for children in France with a score of 4/5.

17/20

High score of 17/20 for Spider-Man Unlimited on the most famous videogame website in France.

UV: 44,185,472


FANS of tight Lycra and arachnoids have got a lot to be pleased about this week.
Spider-Man: Unlimited has come out on iOS and Android and it is a very decent wee game.
It is an endless runner with a gorgeous cel-shaded comic book art style, with a natty story built in.
Intuitive, fast and with a great script, I strongly suggest you ditch Temple Run 2 straight away and invest your time in this instead.
7

Great featuring for Spider-Man Unlimited on the popular newspaper The Sun

Circ: 2,213,659


BROTHERS IN ARMS 3
iOS, Android, Free
What an explosive start to the New Year. A brilliant game which is free to download. And this is a cross-platform title which means you can use your iPhone to fight alongside someone with a Samsung Galaxy.
There are eight action-packed chapters which all have a main story mission.
Of the 12 brothers you can unlock, each one has a unique ability to help you decide who to take on missions.
As well as upgrading each stat you can also choose historical weapons or use Blueprint currency to pick-up Experimental Weapons which have advanced capabilities.
Visually the game is OK but it handles very well and the controls are easy to use. And, let's not forget, it's free.
OWEN ANSLOW

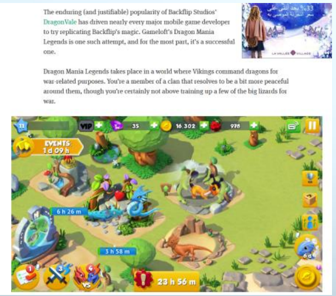
Great featuring for Brothers in Arms 3 with a score of 4/5 in Sunday Mirror newspaper

Circ: 1,845,683

Pastry Paradise featured on the well-known *The Independent* website

UV: 53,371,326

Gamezebo Rating
Great: 4 out of 5 stars
★ ★ ★ ★


The enduring (and justifiable) popularity of Backflip Studios' DragonVale has driven nearly every major mobile game developer to try replicating Backflip's magic. Gameloft's Dragon Mania Legends is one such attempt, and for the most part, it's a successful one.

Dragon Mania Legends takes place in a world where Vikings command dragons for war-related purposes. You're a member of a clan that resolves to be a bit more peaceful around them, though you're certainly not above training up a few of the big lizards for war.

Great rating from Gamezebo for Dragon Mania Legends : 17/20

absoluteradio.co.uk

Spider-Man Unlimited featured as « The Game of the Week » on a famous teenager radio

13,7 million weekly listeners

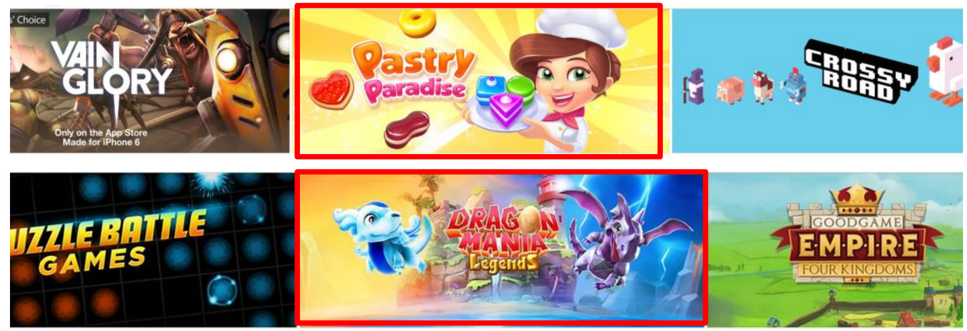
Massive audience: 2 billions installs

126m installs	35m installs	460m installs	108m installs	24m installs
11m installs	10m installs	38m installs	27m installs	23m installs
23m installs	24m installs	51m installs	67m installs	40m installs

Strong relationship with Apple, Google & others

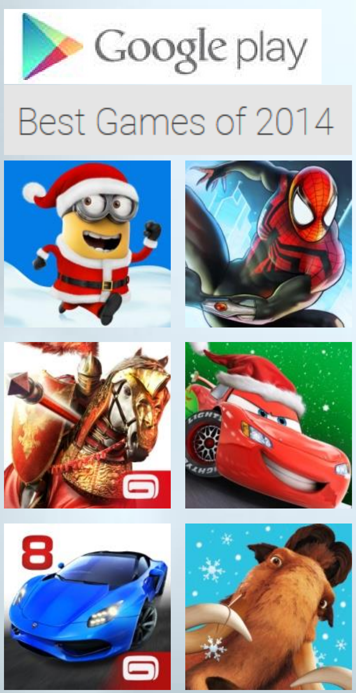
App Store

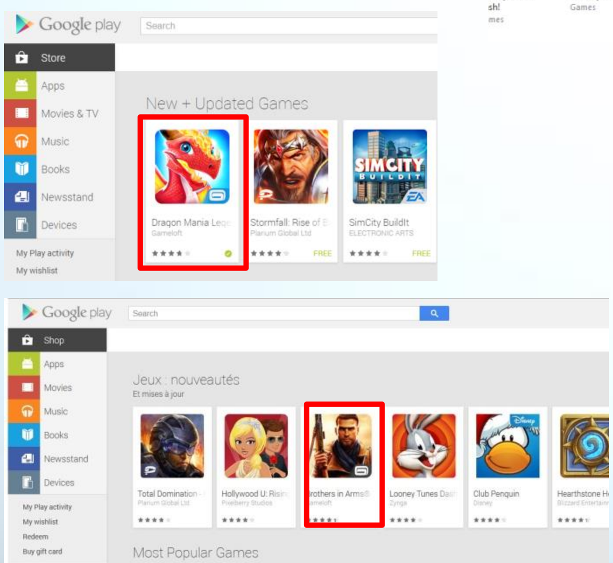
Showcase Banner



Best New Games Icon

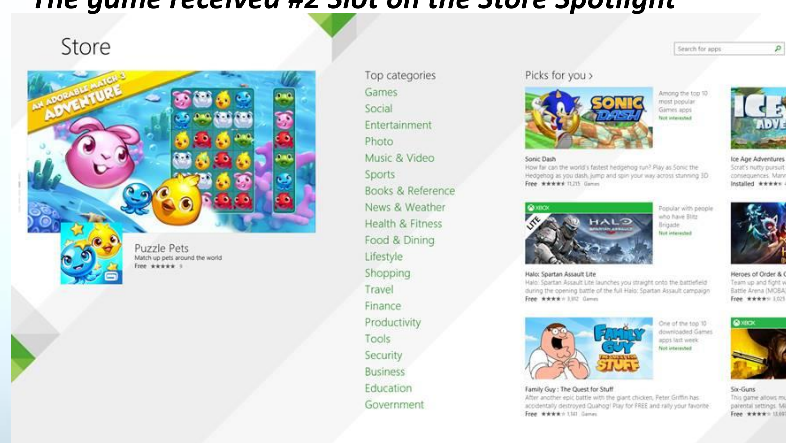
Premium featuring on Google Play





Windows

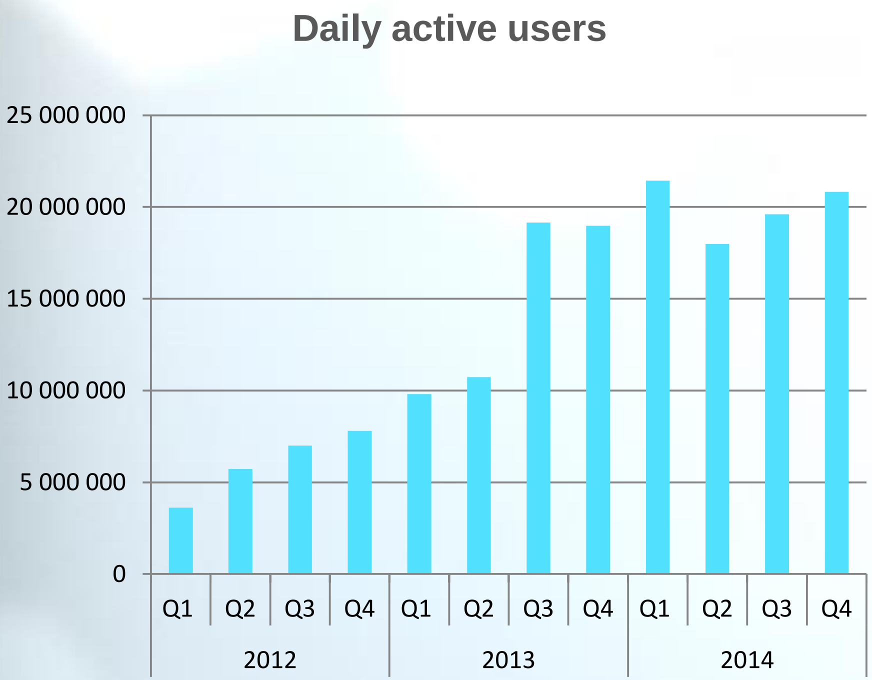
The game received #2 Slot on the Store Spotlight

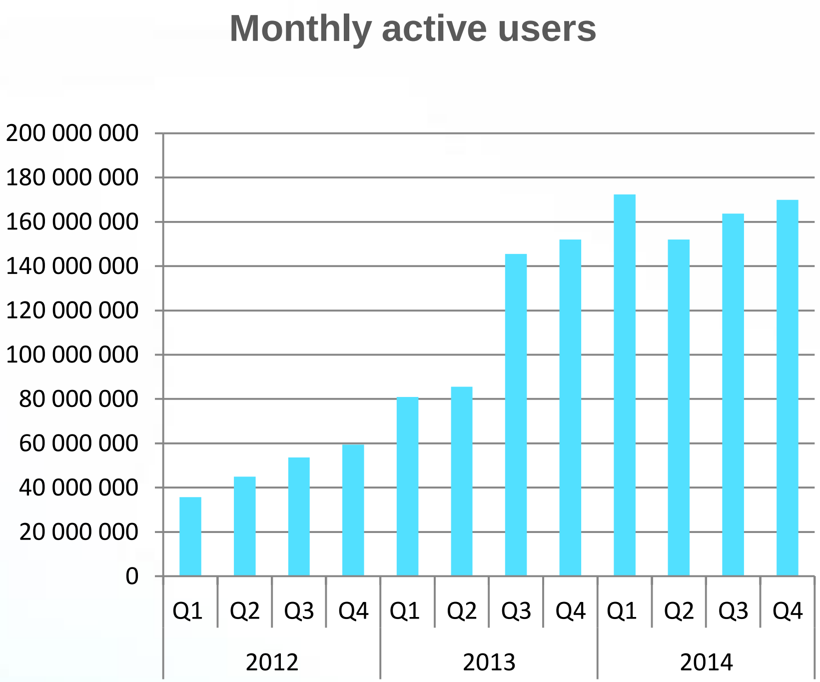


MOBILE ADVERTISING

A worldwide marketing network

Massive audience



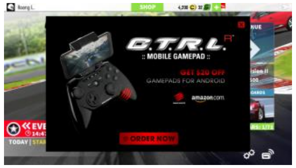


Ad campaign examples

amazon France

User Engagement »
Interstitials Click Rate: 11.54%
Campaign selected as:
"Amazon Europe's Best Practice"!

MAD CATZ US



User Engagement »
CVR Video Incentivized: 95%
CTR Interstitial: 8.41%

Gillette Singapore

User Engagement
Completed View Rate: 87%
End Screen Click Rate: 2.35%

SONY Worldwide

User Engagement
Interstitials Click Rate: 7.51%

FOX France

User Engagement
Interstitials Click Rate: 18.58%

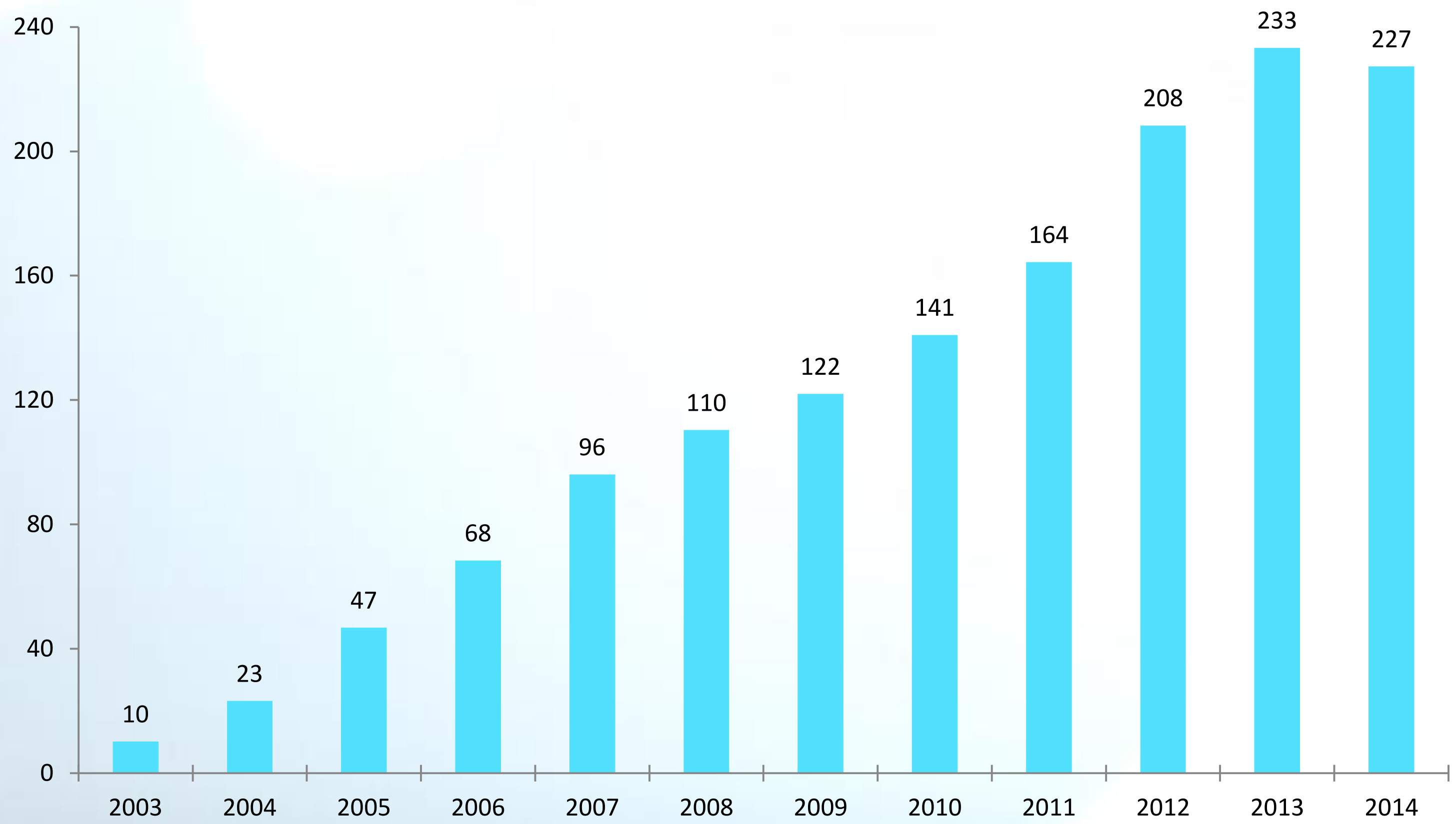
orange France

User Engagement
Interstitials Click Rate: 4.5%

FINANCIALS

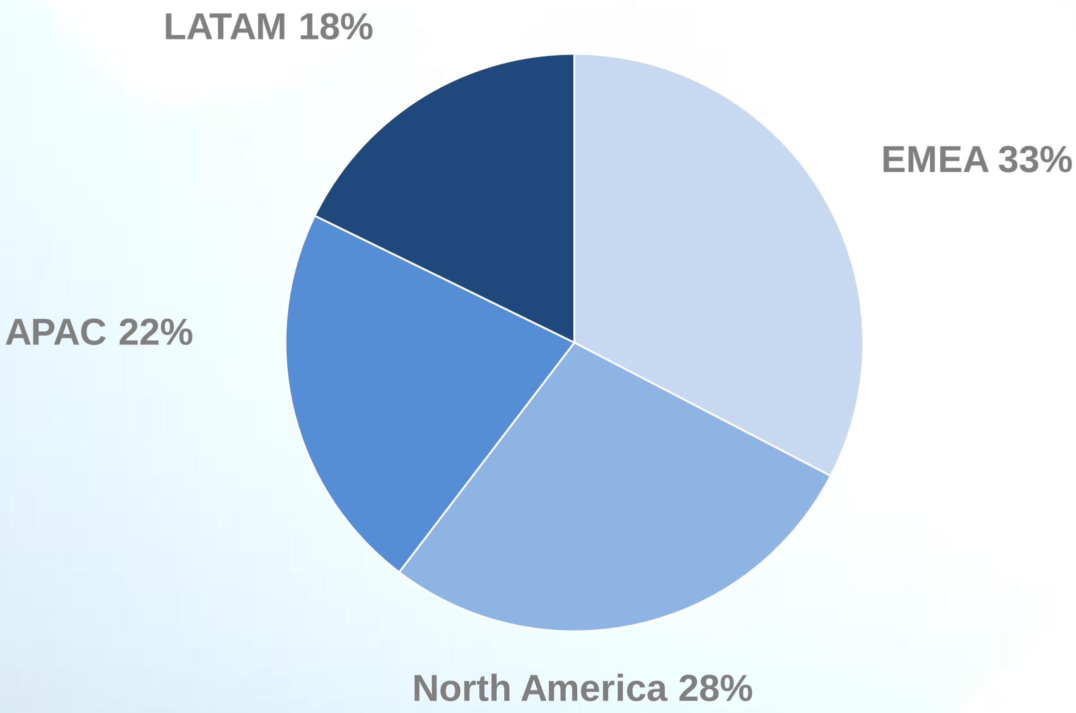
Key financial indicators (1/3)

Sales (m€) – CAGR 2003 – 2014 = 33%

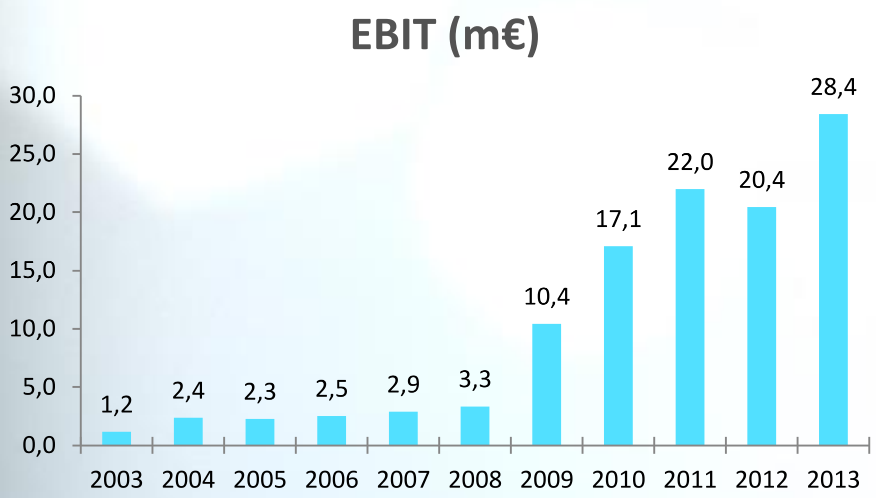


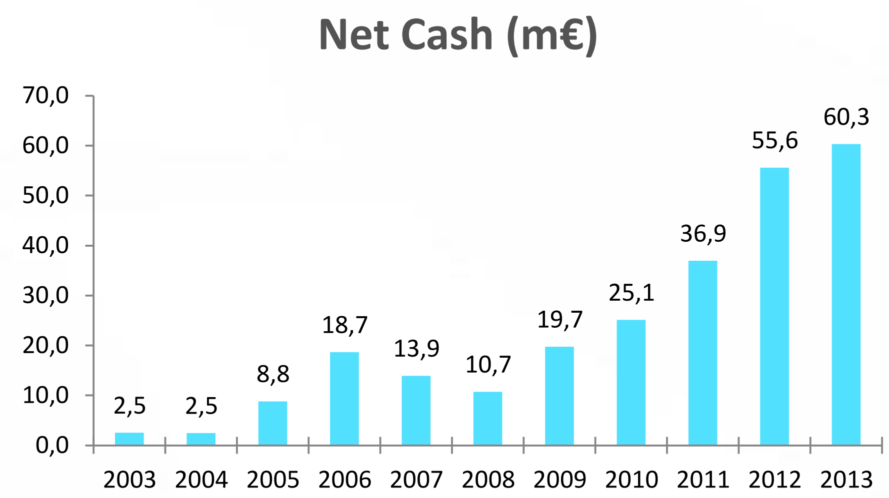
Key financial indicators (2/3)

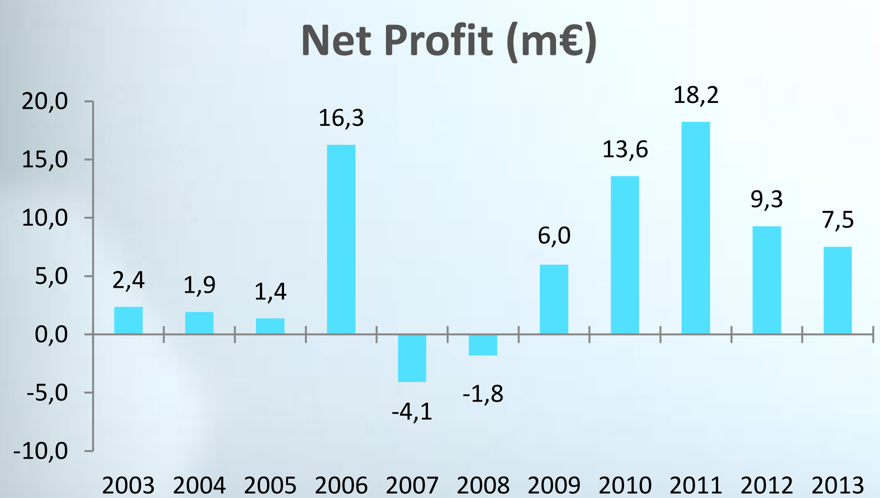
2014 sales per region

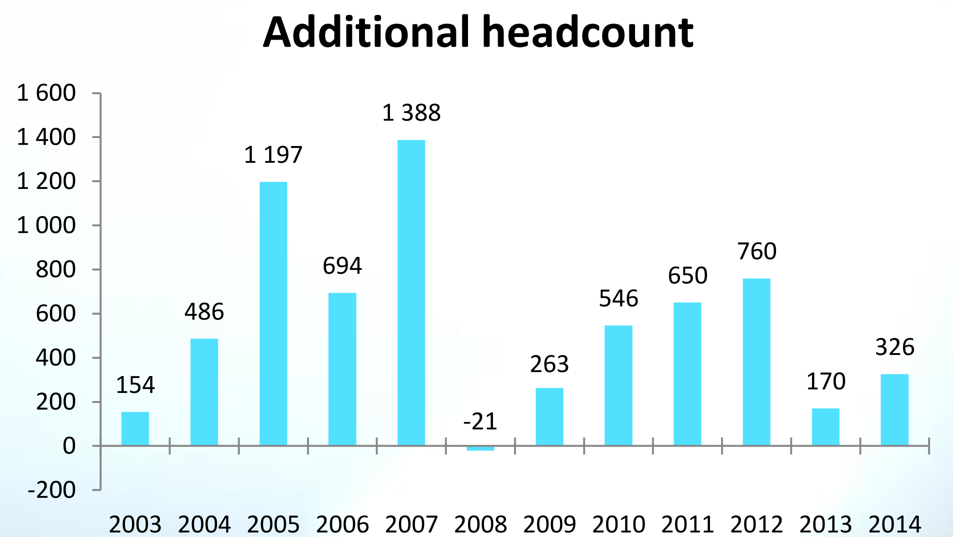


Key financial indicators (3/3)









Profit & Loss Account

M€	H1 2014	% of sales	H1 2013	% of sales
Sales	**111,3**	*100%*	**109,4**	*100%*
Cost of sales	-19,7	*-18%*	-19,1	*-17%*
Gross margin	**91,6**	***82%***	**90,3**	***83%***
R&D	-56,1	*-50%*	-51,6	*-47%*
Sales & Marketing	-20,2	*-18%*	-17,8	*-16%*
Administration	-13,2	*-12%*	-9,2	*-8%*
Other expenses	-0.5	*0%*	-0,4	*0%*
Current operating income	**1,6**	***1%***	**11,2**	***10%***
Stock-based compensation	-2,0	*-2%*	-1,7	*-2%*
Other operating revenues & expenses	-0,2	*0%*	-1.1	*-1%*
Operating income	**-0,6**	***-1%***	**8,4**	***8%***
Net financial income	2,9	*3%*	-2,7	*-2%*
Net income before tax	**2,3**	***2%***	**5,7**	***5%***
Income tax	-2,4	*-2%*	-3,9	*-4%*
Net income (group share)	**-0,1**	***0%***	**1,8**	***2%***

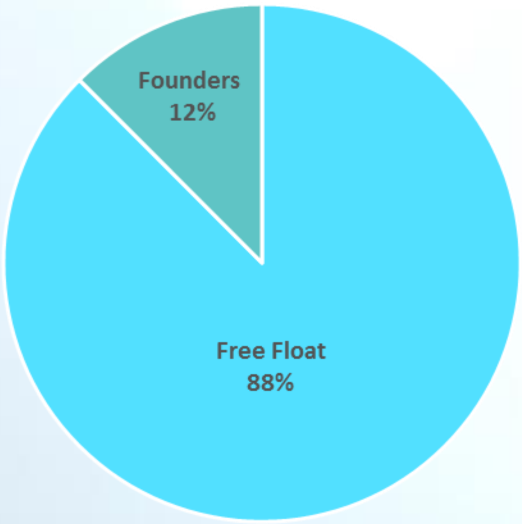
Balance Sheet

ASSETS (M€)	30/06/14	31/12/13
Intangible assets	8,3	8,1
Tangible assets	21,3	16,4
Non-current financial assets	6,1	6,7
Tax assets	14,0	11,2
Total non-current assets	**49,7**	**42,5**
Client receivables	58,3	62,8
Other receivables	23,8	20,6
Cash	59,0	61,8
Total current assets	**141,1**	**145,2**
TOTAL	**190,7**	**187,7**
LIABILITIES (M€)		
Capital	96,3	92,8
Reserves	43,2	36,0
Net profit	-0,1	7,5
Shareholders' equity	**139,4**	**136,3**
Non-current liabilities	6,7	4,3
Current liabilities	44,6	47,1
TOTAL	**190,7**	**187,7**

Cash Flow Statement

M€	H1 2014	H1 2013
Net income	-0,1	1,8
Depreciation & provisions	8,0	7,3
Stock based compensations	2,0	1,7
Deferred tax and others	-2,0	0,2
Operating cash flow before working capital	**7,9**	**11,0**
Change in working capital	0,8	2,4
Operating cash flow	**8,6**	**13,4**
CAPEX	-9,3	-5,0
License acquisitions	-3,9	-3,2
Others	-1,0	-0,7
Free cash flow	**-5,6**	**4,5**
New loan mid-term, long-term	1,4	0,0
Capital increase in relation to stock options	2,9	3,3
Share buy-back	-0,5	-3,7
Effects of exchange rate changes	-0,0	1,0
Change in net cash	**-1,8**	**5,0**

Shareholders Information



www.gameloft.com

Stock market Information

SBF120 stock, listed on NYSE Euronext Paris

Level 1 ADR traded OTC in the US

Shares outstanding 85,625,097 (as of 31/12/2014)

Sector: Software

Identification Codes

ISIN: FR0000079600

Ordinary shares Mnemo: GFT

ADR ticker: GLOFY

Investor Contact

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Deputy CFO
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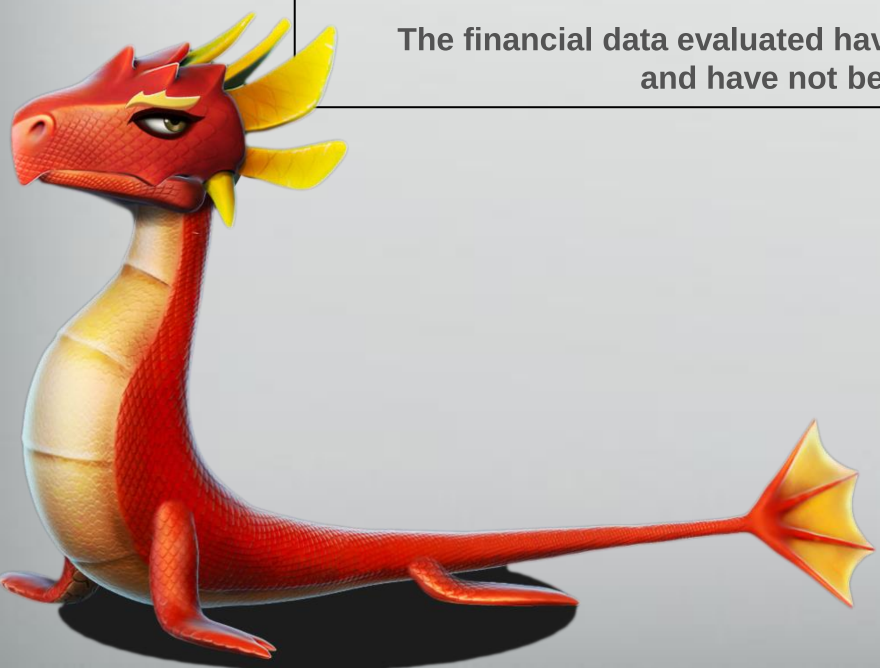
This statement may contain financial data evaluated, information
on future projects and transactions and on future economic results/performance.
Such valuations are provided for estimation purposes only.

They are subject to market risks and uncertainties and may vary significantly with
the actual results that shall be published.

The financial data evaluated have been presented to the Board of Directors
and have not been audited by the Auditors.



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