

**GAMELOFT
2015**



July 2015

INTRODUCTION

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- ◆ **ABOUT GAMELOFT**
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- ◆ **FINANCIALS**

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 7 000 smartphone & 350 feature phone models in 16 languages and on multiple operating systems (iOS. Android. WP8. etc.)
- Flood of 50\$-100\$ smartphones & tablets: Average smartphone retail price expected at 297\$ in 2014 vs. 345\$ in 2013*

* Source: Consumer Electronic Association – January 2014

ABOUT GAMELOFT



Competitive advantages

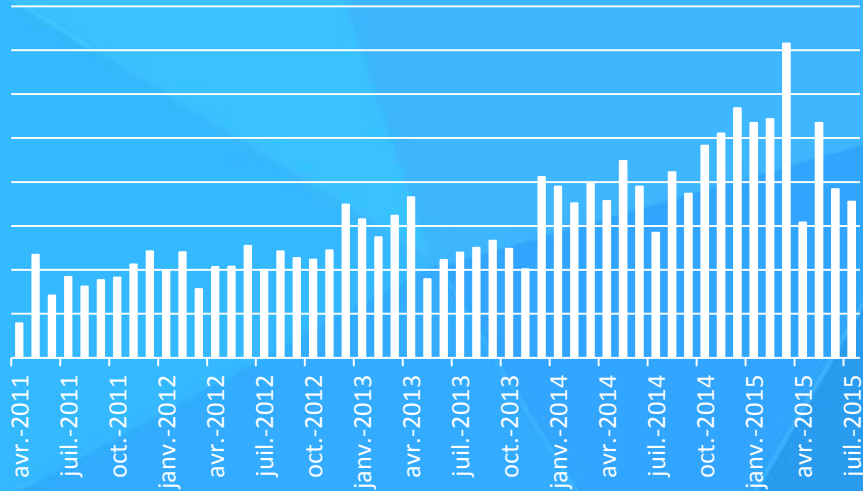


- All Gameloft games are developed in-house. World class product development and deployment on smartphones. feature phones. tablets. smart TVs. Quality comes first.
- 700 million Gameloft games were downloaded in 2014 on the AppStore and Google Play.
- Gameloft was the worldwide #1 publisher on iOS and Google Play combined by downloads according to App Annie's H1 2015 index for games.
- Our 22 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 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.

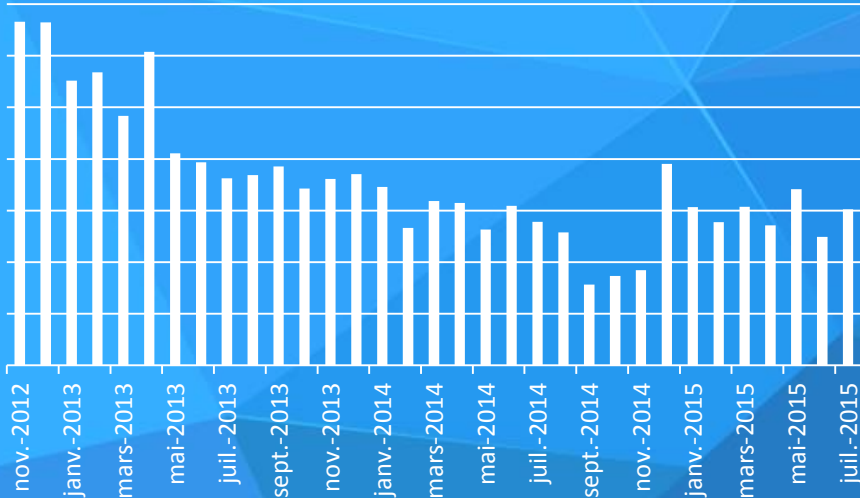


Time extended! (1/2)

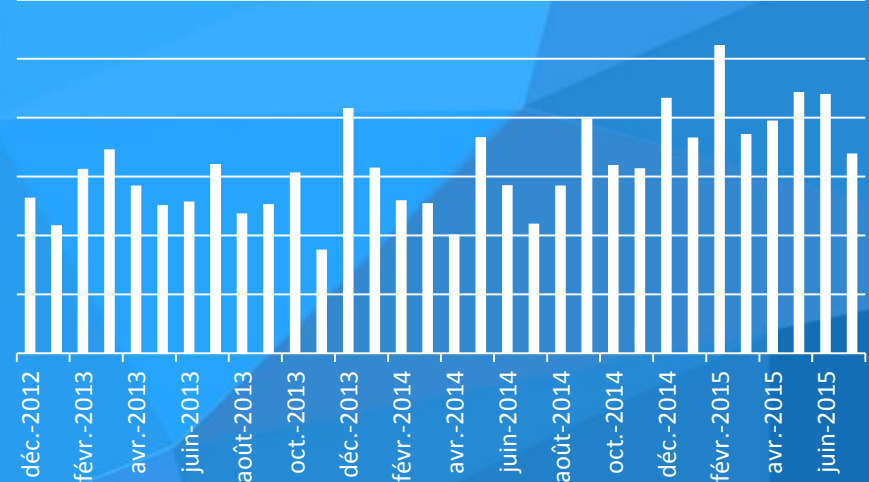
Order & Chaos Online – monthly sales since launch



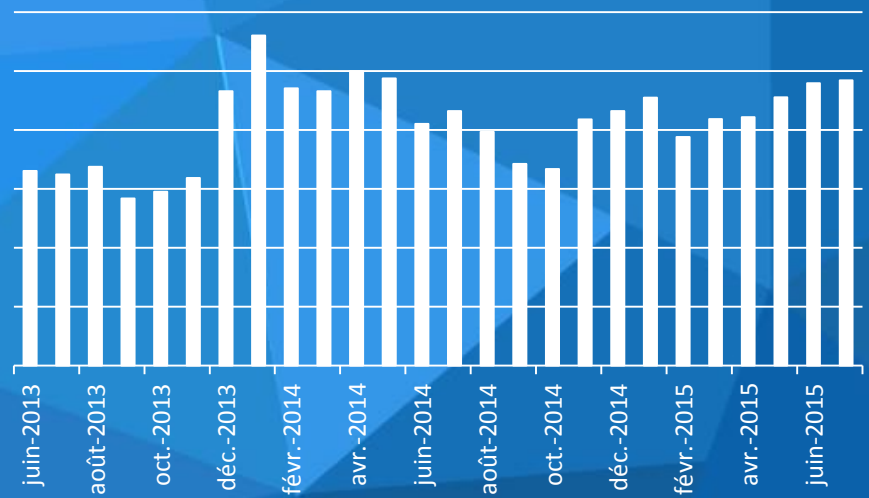
My Little Pony – monthly sales since launch



Heroes of Order & Chaos – monthly sales since launch



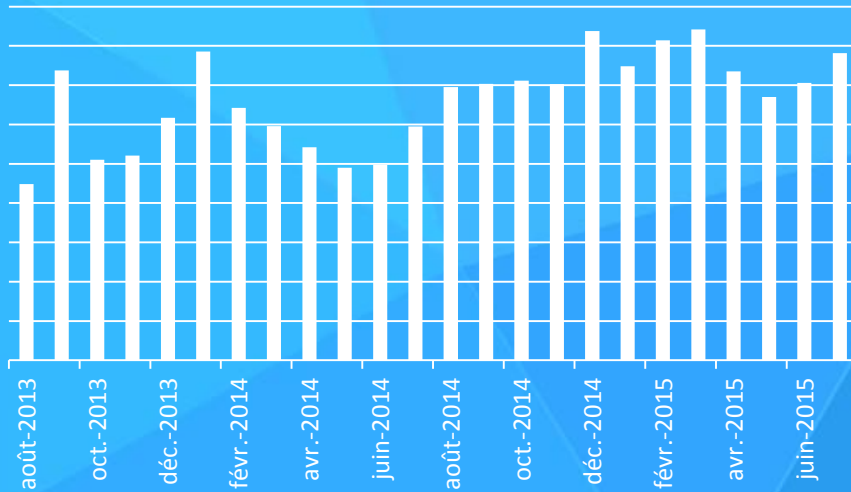
Uno & Friends – monthly sales since launch



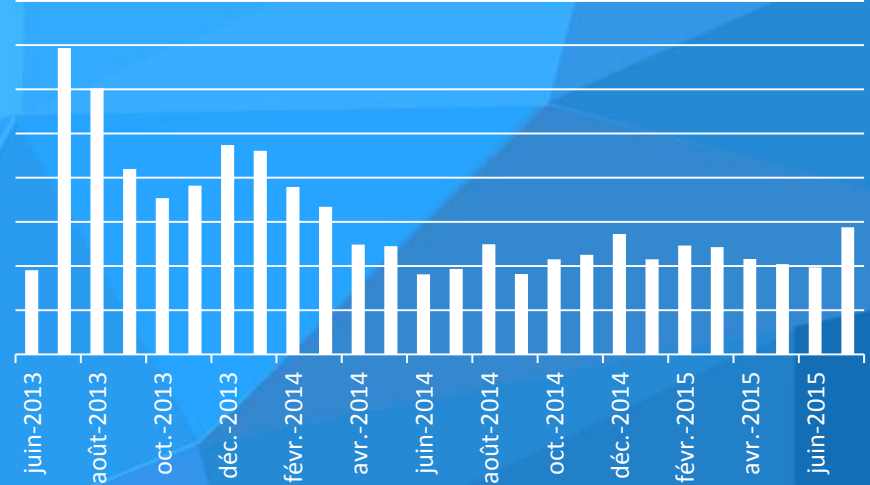


Time extended! (2/2)

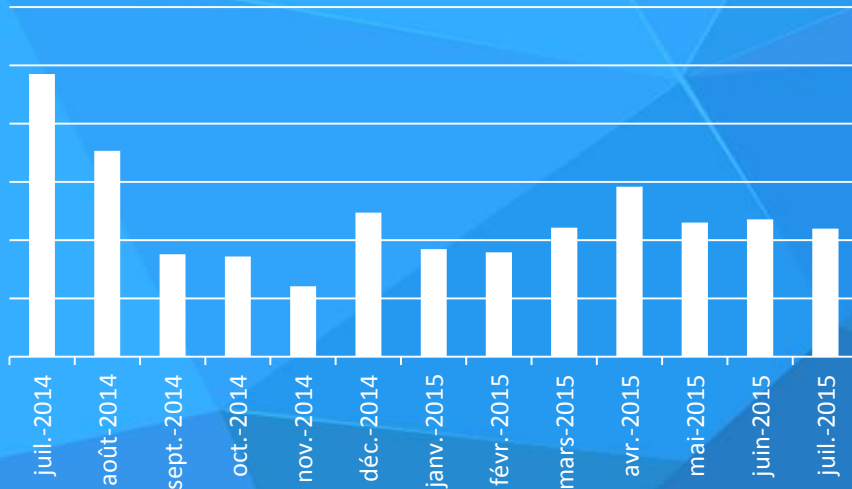
Asphalt 8 – monthly sales since launch



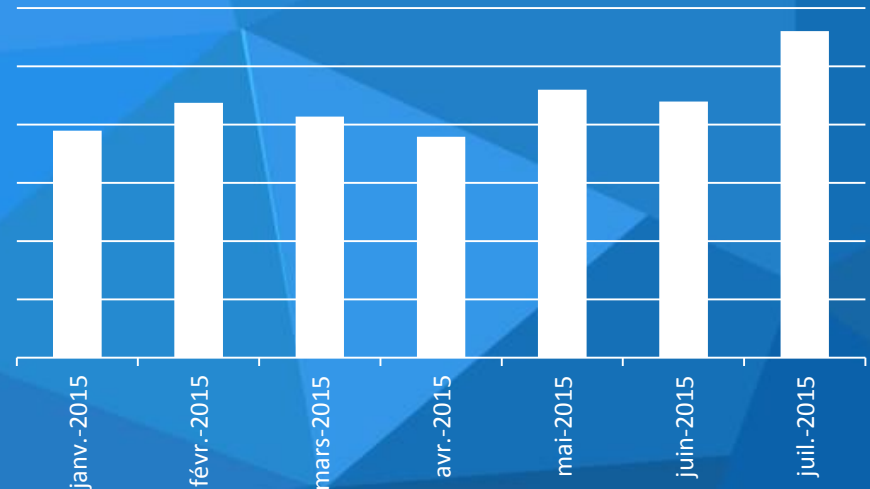
Despicable Me 2 – monthly sales since launch



Modern Combat 5 – monthly sales since launch



Dragon Mania Legends – monthly sales since launch



The #1 game catalogue

Strong in house franchises

**BLITZ
BRIGADE**

**ASPHALT
AIRBORNE 8**

**WORLD
AT ARMS**

**GANGSTAR
VEGAS**

SIEGEFALL

SIX-GUNS

**DUNGEON
HUNTER
V**

**DRAGON
MANIA
Legends**

**TOTAL
CONQUEST**

**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**

**Disney · PIXAR
Cars
FAST AS
LIGHTNING**

**my LITTLE
PONY**

**MARVEL
SPIDER-MAN
UNLIMITED**

**IRON MAN 3
THE OFFICIAL GAME**

**NFL
PRO 2014**



Massive audience: 2.5 billions installs



146m installs



73m installs



626m installs



115m installs



42m installs



13m installs



24m installs



40m installs



57m installs



8m installs



29m installs



25m installs



56m installs



70m installs



47m installs

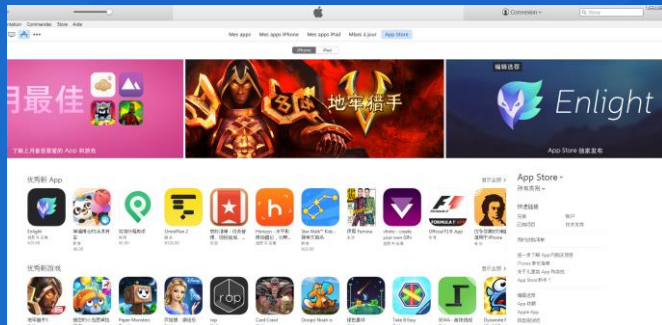
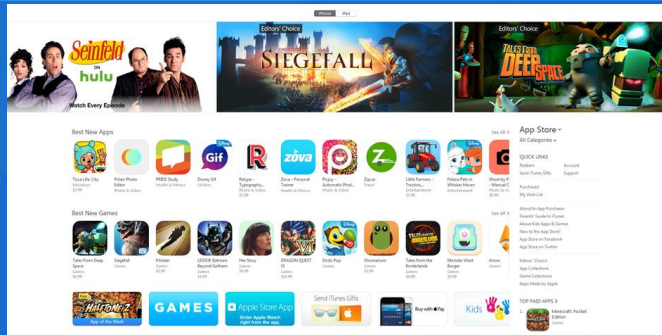


Strong relationship with digital stores

BEST OF
2014



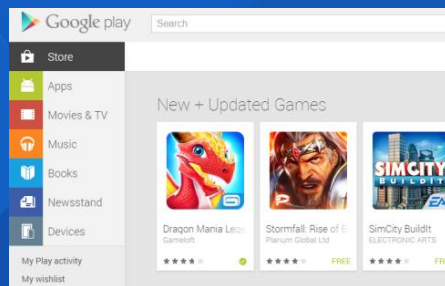
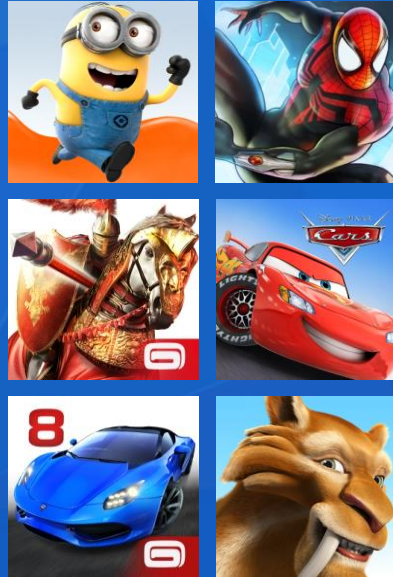
App Store



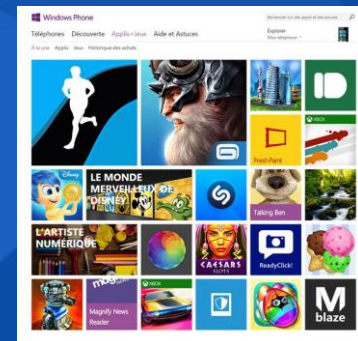
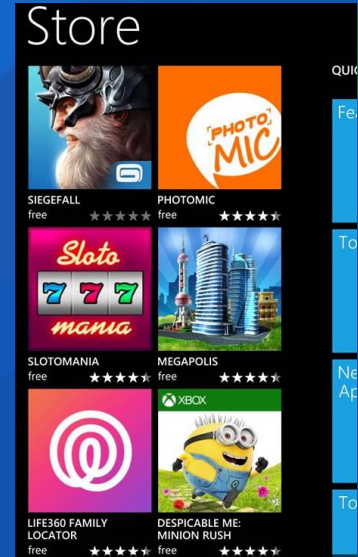
BEST OF
2014



Google play



Windows Phone Store

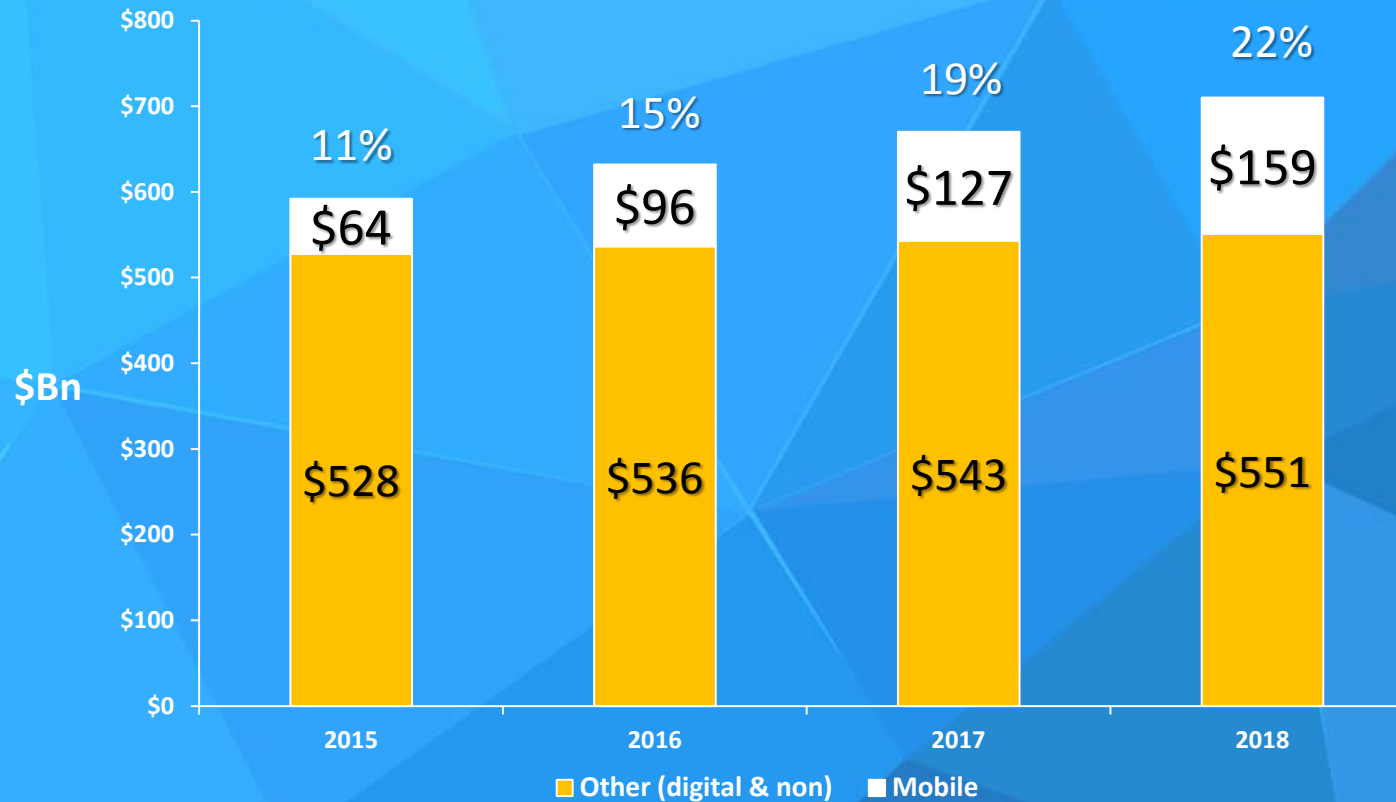


FOCUS ON MOBILE ADVERTISING





The mobile ad opportunity



Millward Brown reported that each day, consumers spend **147 minutes** on their smartphones, **113 minutes** watching TV, **108 minutes** on laptops and **50 minutes** on tablets.

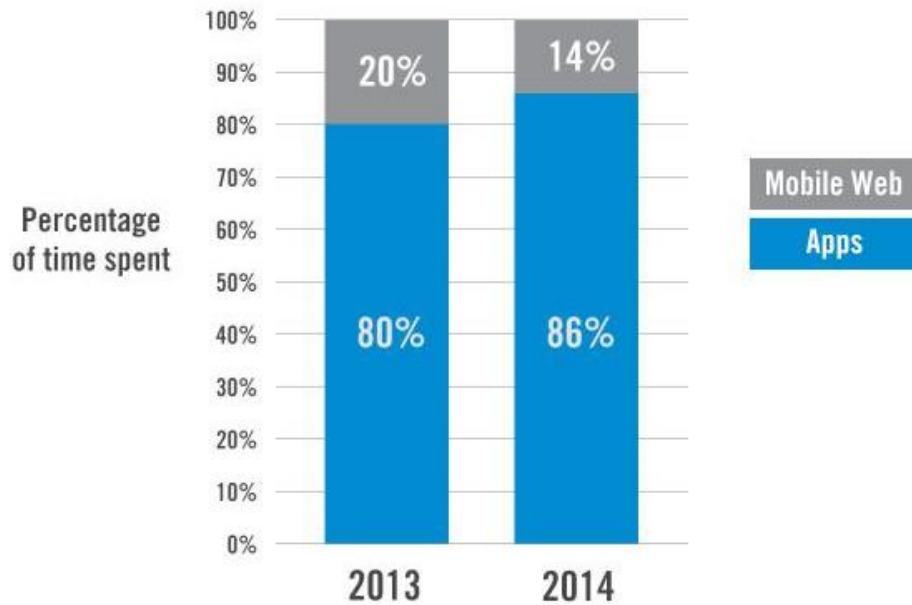


Source:  eMarketer.

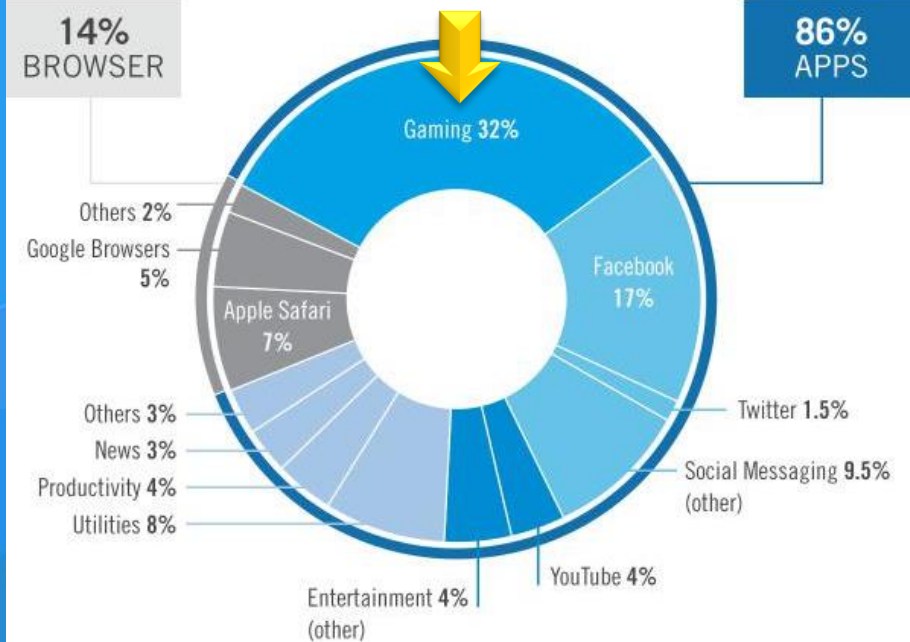


Apps rule! And so do games!

Apps Continue to Dominate the Mobile Web



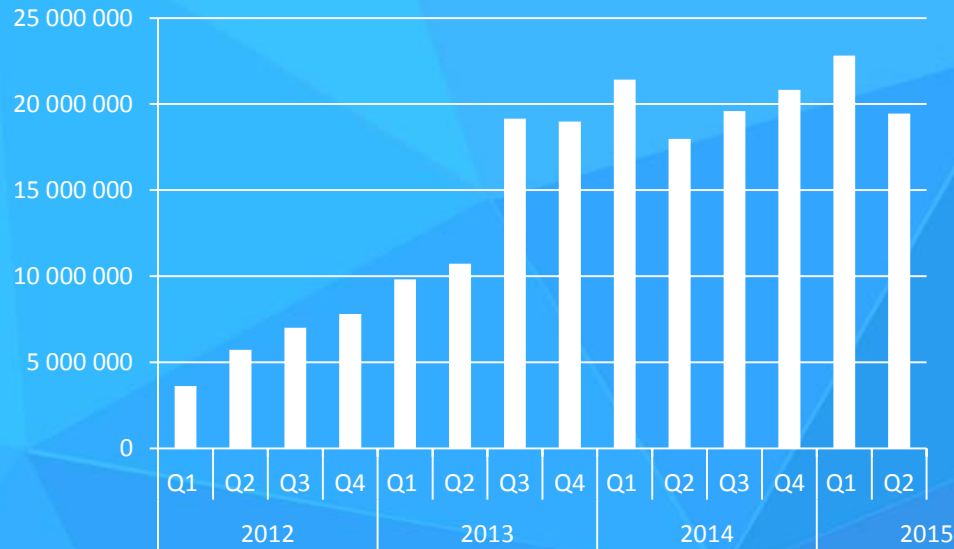
Time Spent on iOS and Android Connected Devices



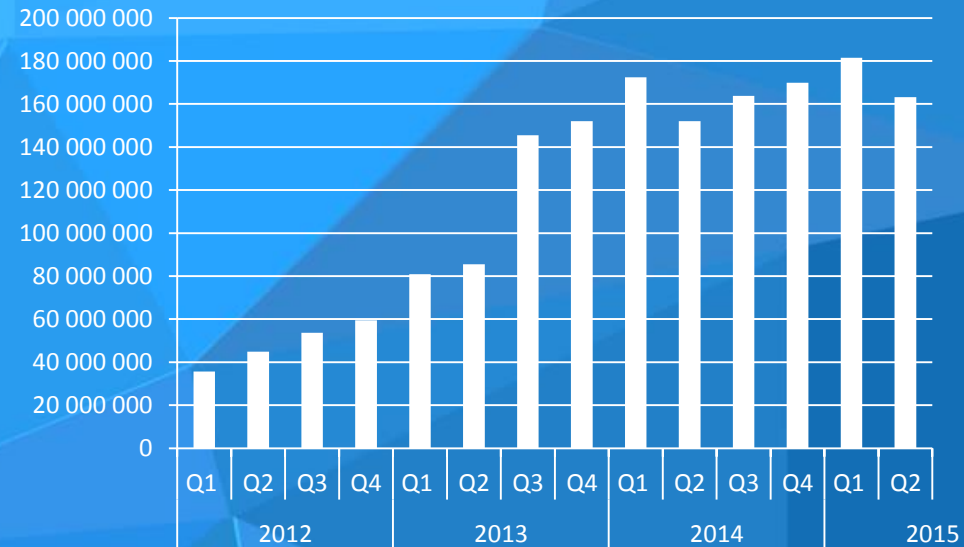


High volume audience

Daily active users



Monthly active users



- **Self-owned inventory: no risk of inventory supply uncertainty**
- **Huge Audience: 163M MAUs / 19M DAUs providing advertisers the reach and scale they need for delivering impactful activations.**
In H1 2015, ranked #1 in worldwide iOS and Google Play combined game downloads
- **Breadth of catalogue: 32 Ad-enabled games as of today**





Ad formats supported

DISPLAY FORMAT

Video



Banner



Interstitial



NATIVE FORMAT

Time Limited Event



Incentivized Video

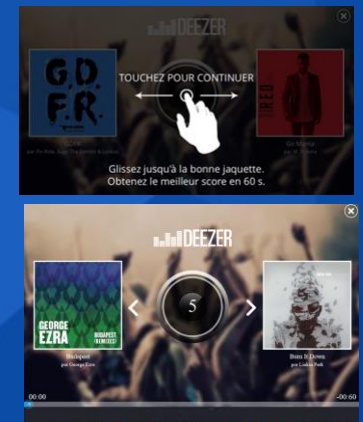


RICH MEDIA FORMAT

Form



Mini Game





Brand safety. Pricing clarity. Creativity

- Listed company
 - Mobile entertainment pure player
 - High quality focus
 - COPPA compliant
- ★★★★★
- Sole destination for accessing Gameloft audience
 - Direct relationship with advertisers
= no intermediary black box
- ★★★★★
- Pioneer mobile gaming developer with 15 years experience creating AAA titles
- ★★★★★



Global reach and scale

Sales & Marketing Teams Around The World



North America

- USA
- Canada

LatAm

- Argentina
- Brazil
- Chile
- Colombia
- Mexico

Europe

- Denmark
- France
- Germany
- Italy
- Russia
- Spain
- Ukraine
- UK

Asia / Oceania

- Australia
- China
- India
- Indonesia
- Japan
- Korea
- Malaysia
- Philippines
- Thailand
- Vietnam

Middle East & Africa

- Dubai
- Morocco
- Turkey
- South Africa





Some of our references to date



NOKIA



amazon.com



AIRFRANCE

acer

SOUQ.com



THRUSTMASTER



Gillette



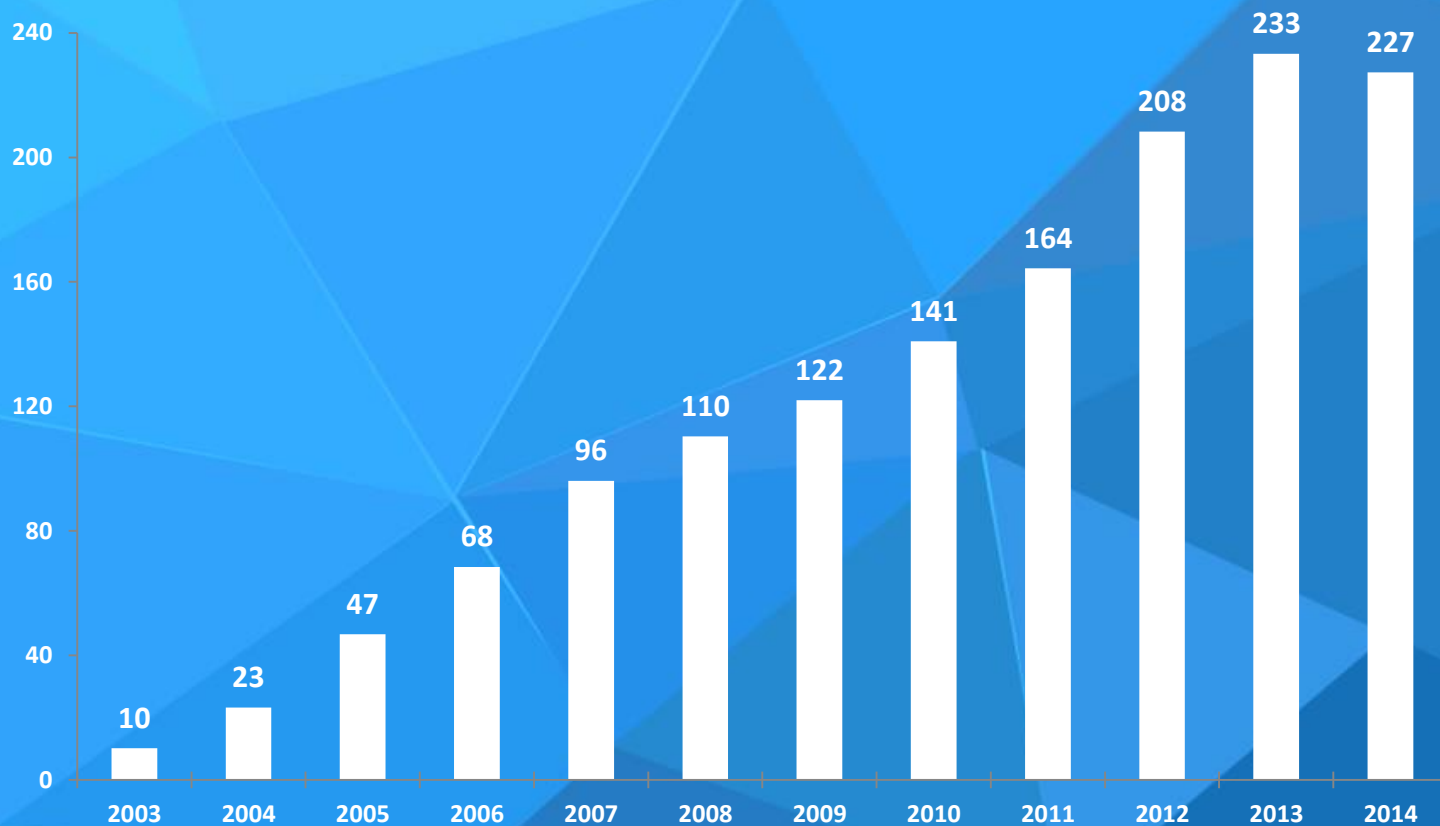
FINANCIALS





Key financial indicators (1/3)

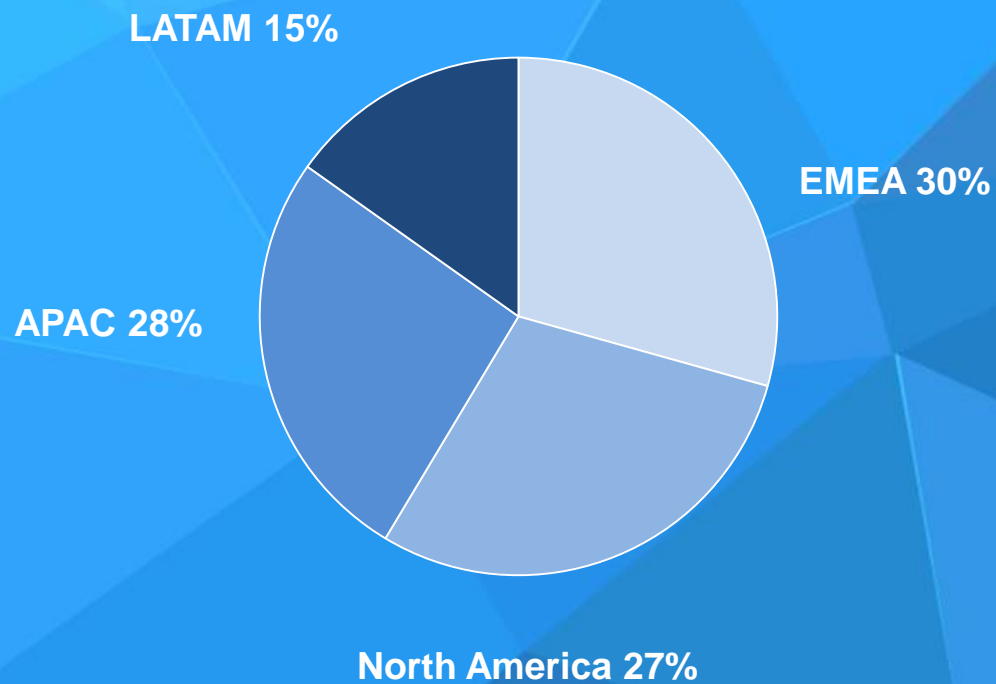
Sales (m€) – CAGR 2003-2014 = 33%





Key financial indicators (2/3)

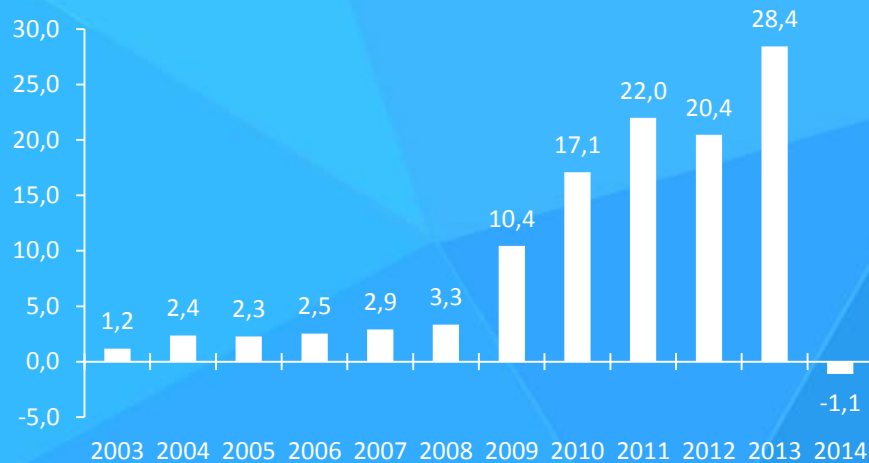
H1 2015 sales per region



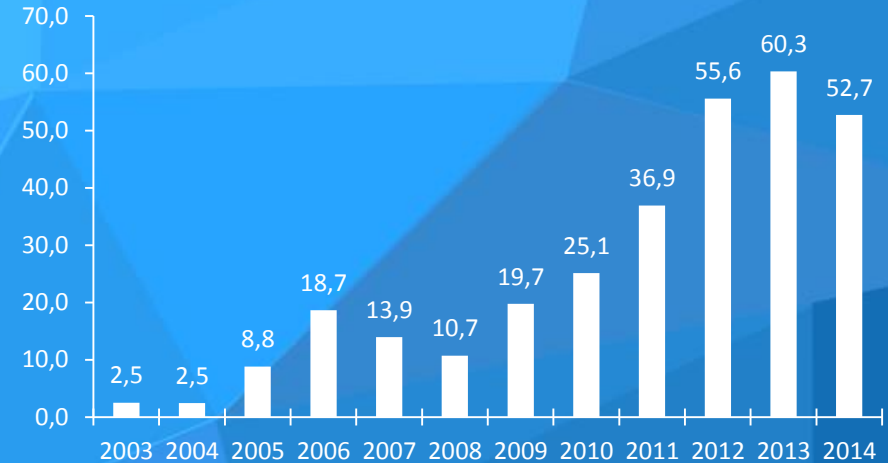


Key financial indicators (3/3)

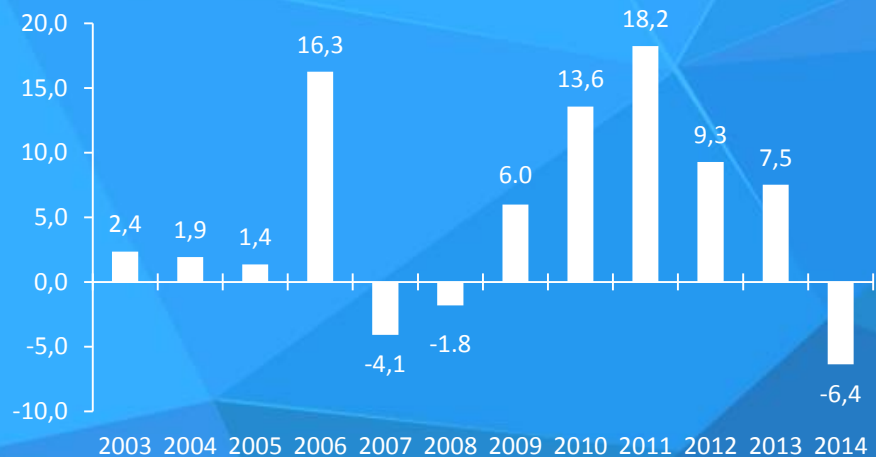
EBIT (m€)



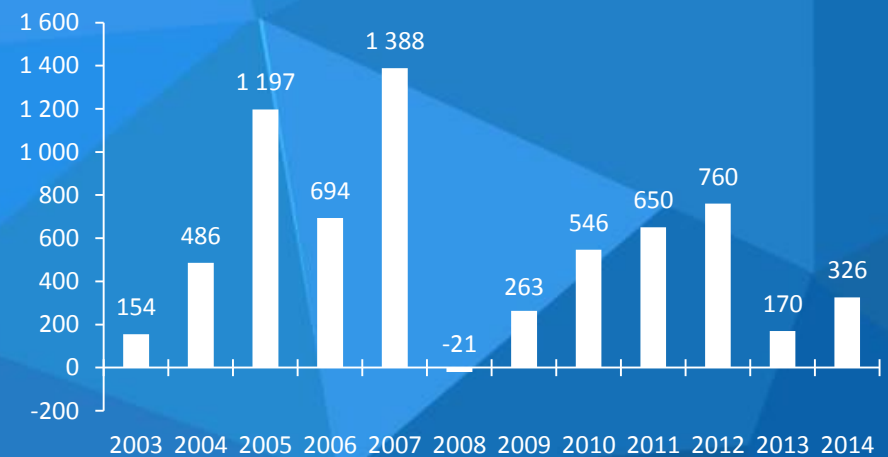
Net Cash (m€)



Net Profit (m€)



Additional headcount





Profit & Loss account

M€	2014	% of sales	2013	% of sales
Sales	227.3	100%	233.3	100%
Cost of sales	-40.1	-18%	-40.5	-17%
Gross margin	187.2	82%	192.8	83%
R&D	-118.5	-52%	-106.8	-46%
Sales & Marketing	-40.9	-18%	-36.1	-15%
Administration	-28.2	-12%	-20.9	-9%
Other expenses	-0.7	0%	-0.4	0%
Current operating income	-1.1	0%	28.4	12%
Stock-based compensation	-3.1	-1%	-3.5	-2%
Other operating revenues & expenses	-0.7	0%	-1.3	-1%
Operating income	-4.9	-2%	23.6	10%
Net financial income	6.7	3%	-7.5	-3%
Net income before tax	1.8	1%	16.1	7%
Income tax	-8.1	-4%	-8.5	-4%
Net income (group share)	-6.4	-3%	7.5	3%



Balance sheet

ASSETS (M€)	31/12/14	31/12/13
Intangible assets	8.5	8.1
Tangible assets	22.9	16.4
Non-current financial assets	5.9	6.7
Tax assets	16.5	11.2
Total non-current assets	53.7	42.5
Client receivables	63.9	62.8
Other receivables	27.3	20.6
Cash	56.3	61.8
Total current assets	147.4	145.2
TOTAL	201.1	187.7
LIABILITIES (M€)		
Capital	95.4	92.8
Reserves	48.7	36.0
Net profit	-6.4	7.5
Shareholders' equity	137.8	136.3
Non-current liabilities	8.6	4.3
Current liabilities	54.7	47.1
TOTAL	201.1	187.7

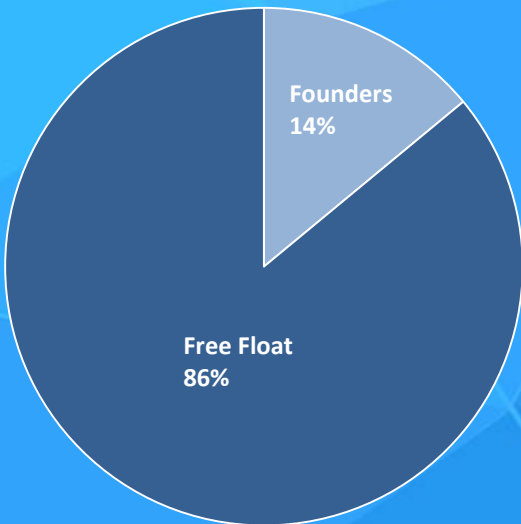


Cash flow statement

M€	2014	2013
Net income	-6.4	7.5
Depreciation. amortization & provisions	18.6	13.6
Stock based compensations	3.1	3.5
Deferred tax and others	-3.3	2.7
Operating cash flow before working capital	12.1	27.4
Change in working capital	-3.4	-1.4
Operating cash flow	8.7	25.9
CAPEX	-17.4	-17.9
License acquisitions	-3.8	-6.1
Others	-0.2	-0.4
Free cash flow	-12.6	1.5
Loan mid-term. long-term	1.4	0
Capital increase in relation to stock options	4.6	10.0
Share buy-back	-1.9	-6.2
Effects of exchange rate changes	0.9	-0.5
Change in net cash	-7.6	4.7



Shareholders information



www.gameloft.com

Stock market Information

Listed on NYSE Euronext Paris

Level 1 ADR traded OTC in the US

Shares outstanding 85.030.122 (as of 17/07/2015)

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.

