CORPORATE PRESENTATION

2014

GAMELOFT

ABOUT DIGITAL GAMING

GAMELOFT

Digital gaming is everywhere

Smartphones & Tablets



Feature phones



TVs & STBs



Smartphones, tablets, smart TVs, STBs, smart watches…

- Installed base of 2 billion smartphones and tablets at the end of 2013
- Rapid growth of the installed base: 1.2 billion smartphones (+20% YoY) and 340 million tablets (+40% YoY) are expected to be sold worldwide in 2014 *
- Rapid growth in gaming on mobile devices

* Source: Consumer Electronic Association – January 2014

A fragmented industry





Gameloft develops its games on 4000 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

A quick adaption to the freemium ecosystem

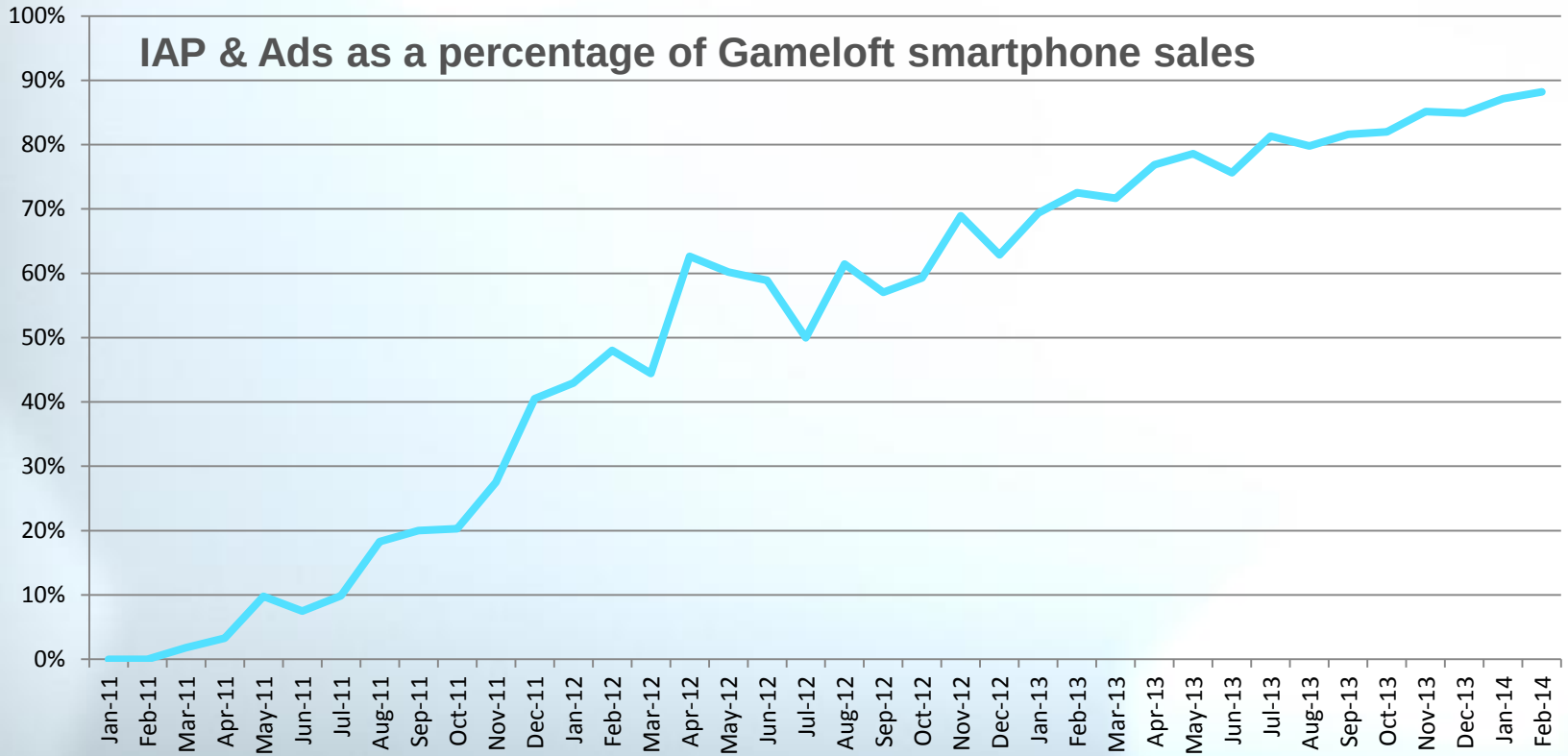
GT Racing and Let's Golf 3 : first Freemium games to launch in early 2011



03/01/2011: Launch of the Freemium version



Launch date: 08/01/2011
Makes more revenue than LG2 ($4,99) after 3 months.
Makes 40% more revenue after 12 months



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.

- Our 27 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 12-15 smartphone and tablet games every year thanks to its 5200 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.

The #1 game catalogue

Gameloft IPs























Third party IPs





















Established in-house franchises

A **HUGE SUCCESS** ON ALL GAMING PLATFORMS

PSP PSVITA NINTENDO DS

OVER **80 MILLION DOWNLOADS**





OVER **3.5 MILLION VIEWS** FOR ASPHALT VIDEOS

A LICENSE **PRAISED BY ALL MEDIA** SINCE 2004

IGN.COM EDITORS' CHOICE AWARD · GOLD AWARD POCKET GAMER · GOLD AWARD POCKET GAMER · AWARDS 2005 BEST DRIVING · airgamer award · BEST OF 2008

A **HIGHLY FEATURED LICENSE**









ASPHALT FUN FACTS

Asphalt players have made **950,000** drives around Earth

$3.2 billion in speeding tickets would be given if *Asphalt* users took their driving to the streets

500 stadiums would be necessary to seat all the players of *Asphalt*

Top Quality Games Across All Genres







265 Million Downloads!

"It's a beautiful game, with popping colors and a lot of variety "

-Touch Arcade

"Not sure who loves this game more—my 9 year old son or his mom?"

-User Review

DESPICABLE ME MINION RUSH

ASPHALT 8 AIRBORNE

91 metacritic

GOLD AWARD POCKET GAMER

"a brilliantly put together arcade racing package"

-Pocket Gamer







#1 Top Paid



Asphalt 8: Airborne

5 stars from 4,306 reviews

#1 Top Free



Despicable Me: Minion Rush

5 stars from 14,734 reviews

Massive audience: 1.3 billion installs



55m installs



16m installs



265m installs



90m installs



25m installs



11m installs



35m installs



26m installs



44m installs



16m installs



21m installs



20m installs



24m installs



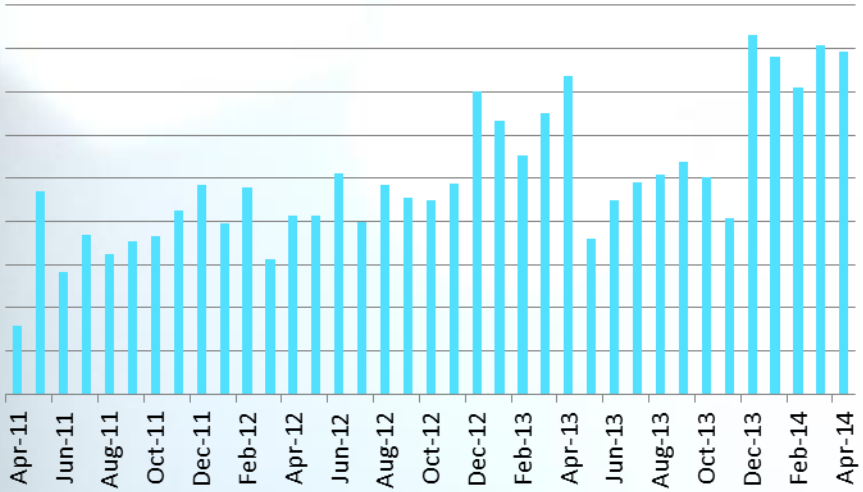
40m installs



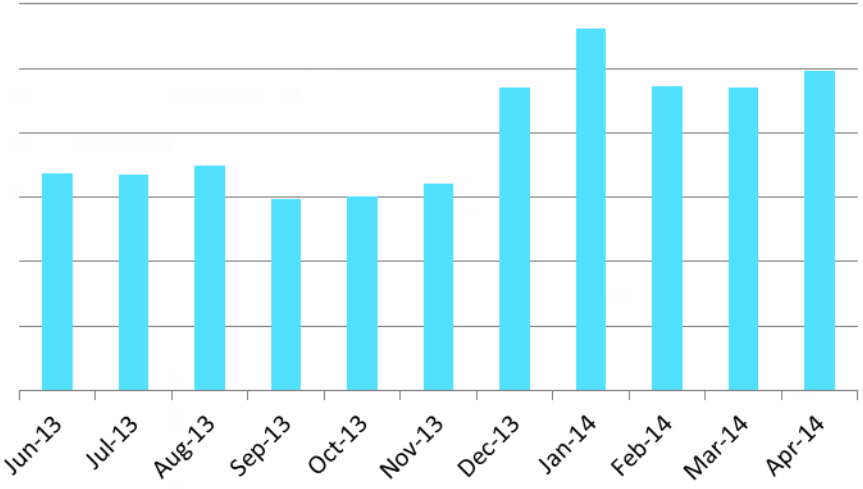
13m installs

Recurring revenue streams

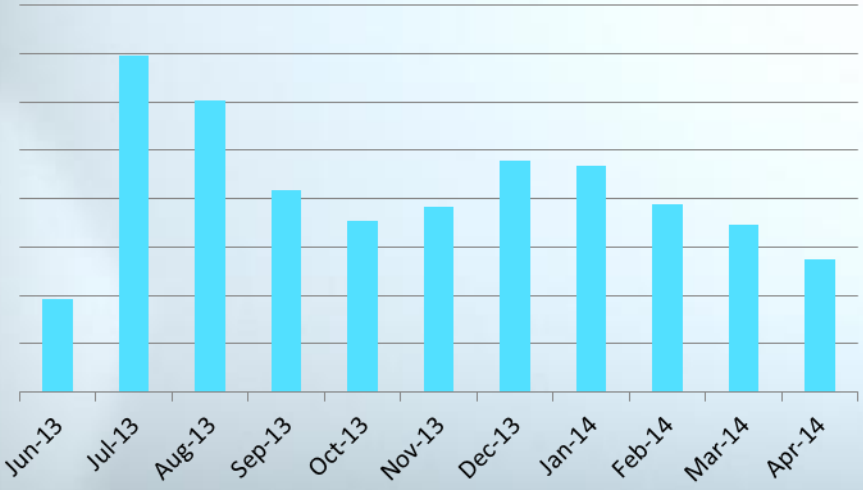
Order & Chaos Online – monthly sales since launch



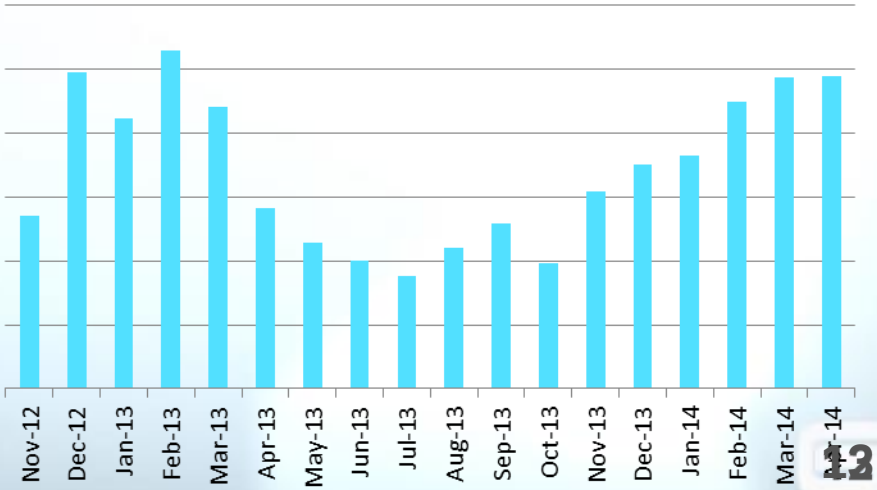
UNO & Friends – monthly sales since launch



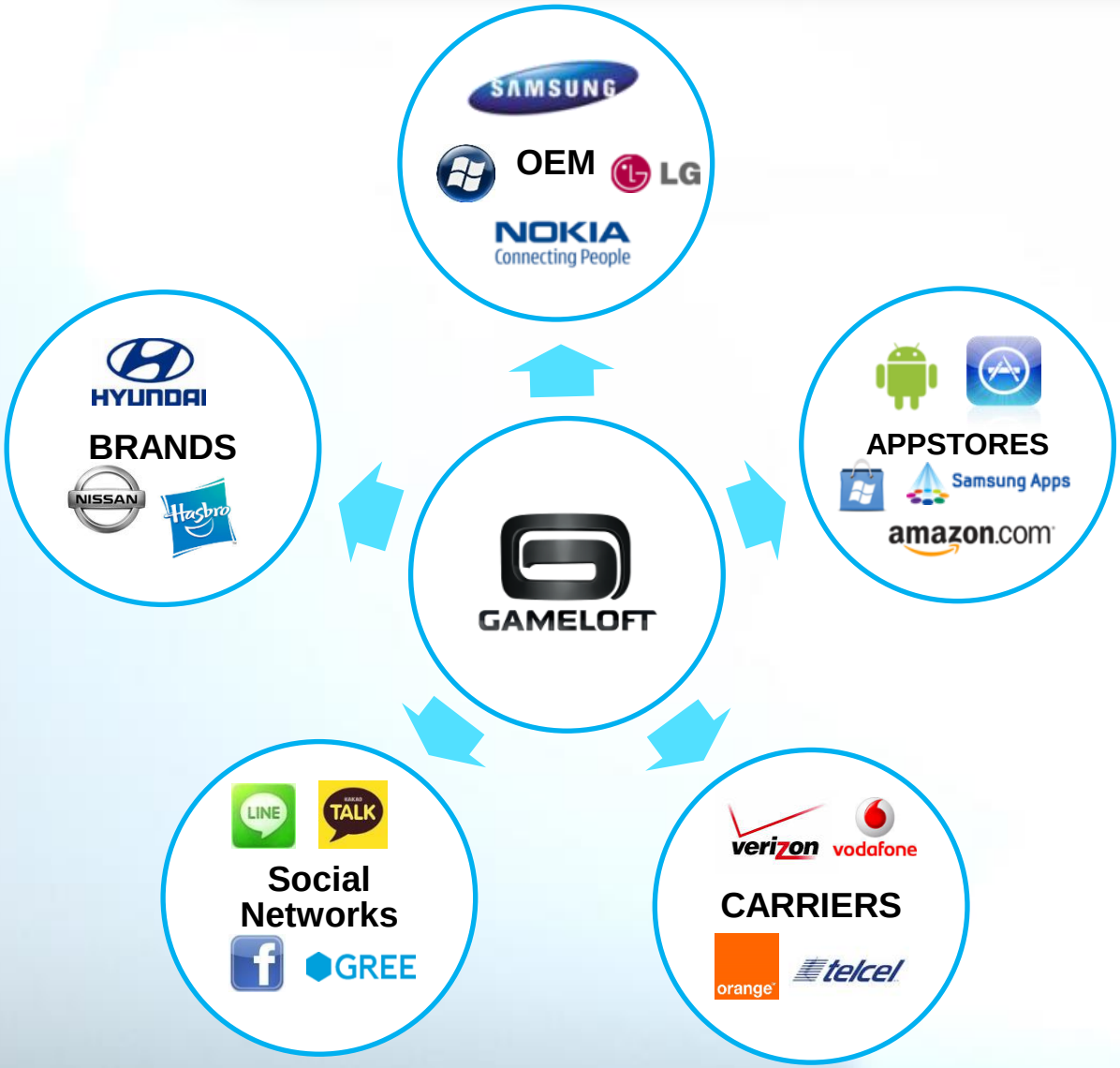
Despicable Me 2 – monthly sales since launch



World at Arms – monthly sales since launch

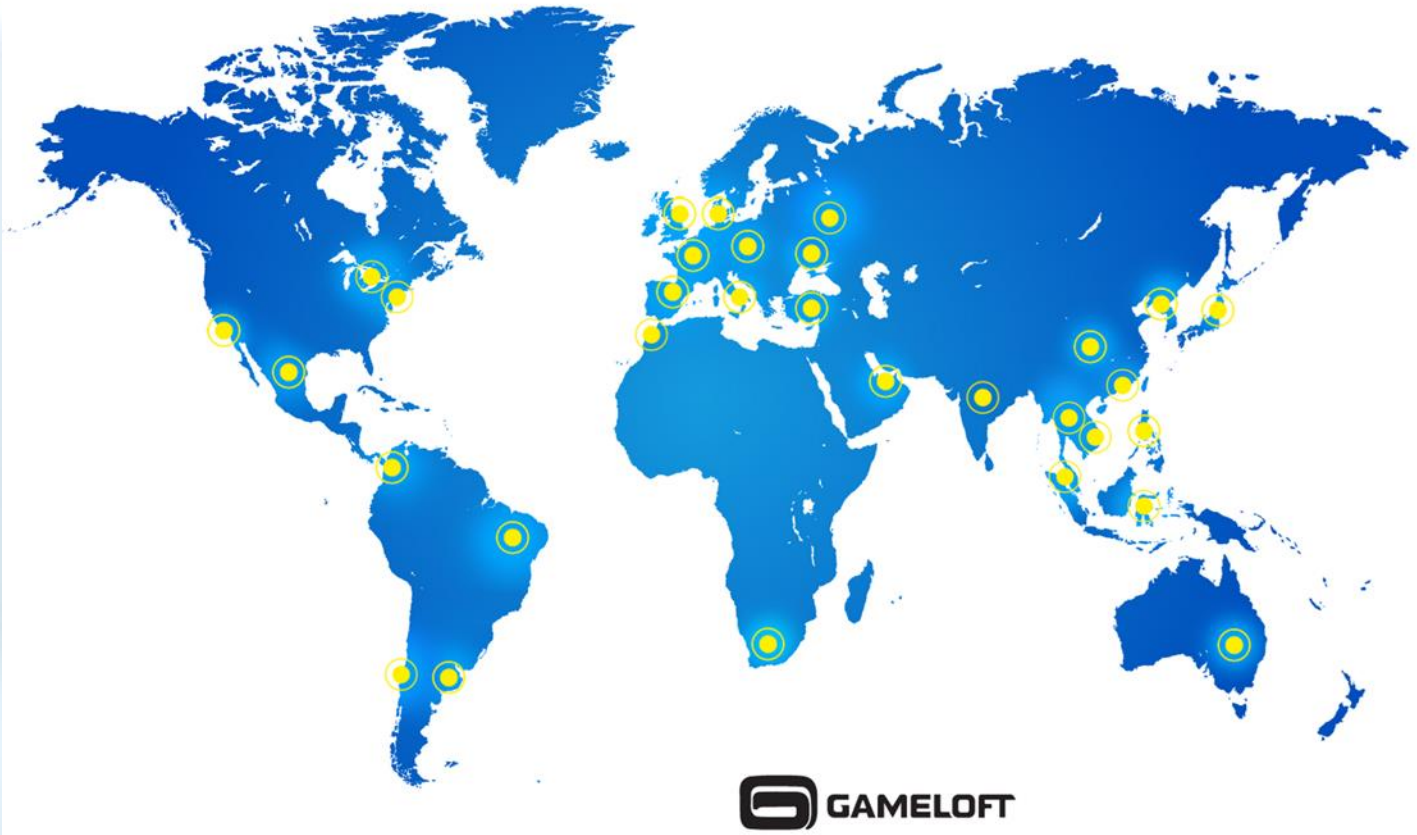


The #1 partnership network



A worldwide marketing network

Sales & Marketing Teams Around The World



North America
USA
Canada

LatAm
Argentina
Brazil
Chile
Columbia
Mexico

Europe
Denmark
France
Germany
Italy
Russia
Spain
Ukraine
UK

Asia / Oceania
Australia
China
India
Indonesia
Japan
Korea
Malaisia
Philippines
Thailand
Vietnam

Middle East & Africa
Dubai
Morocco
Turkey
South Africa

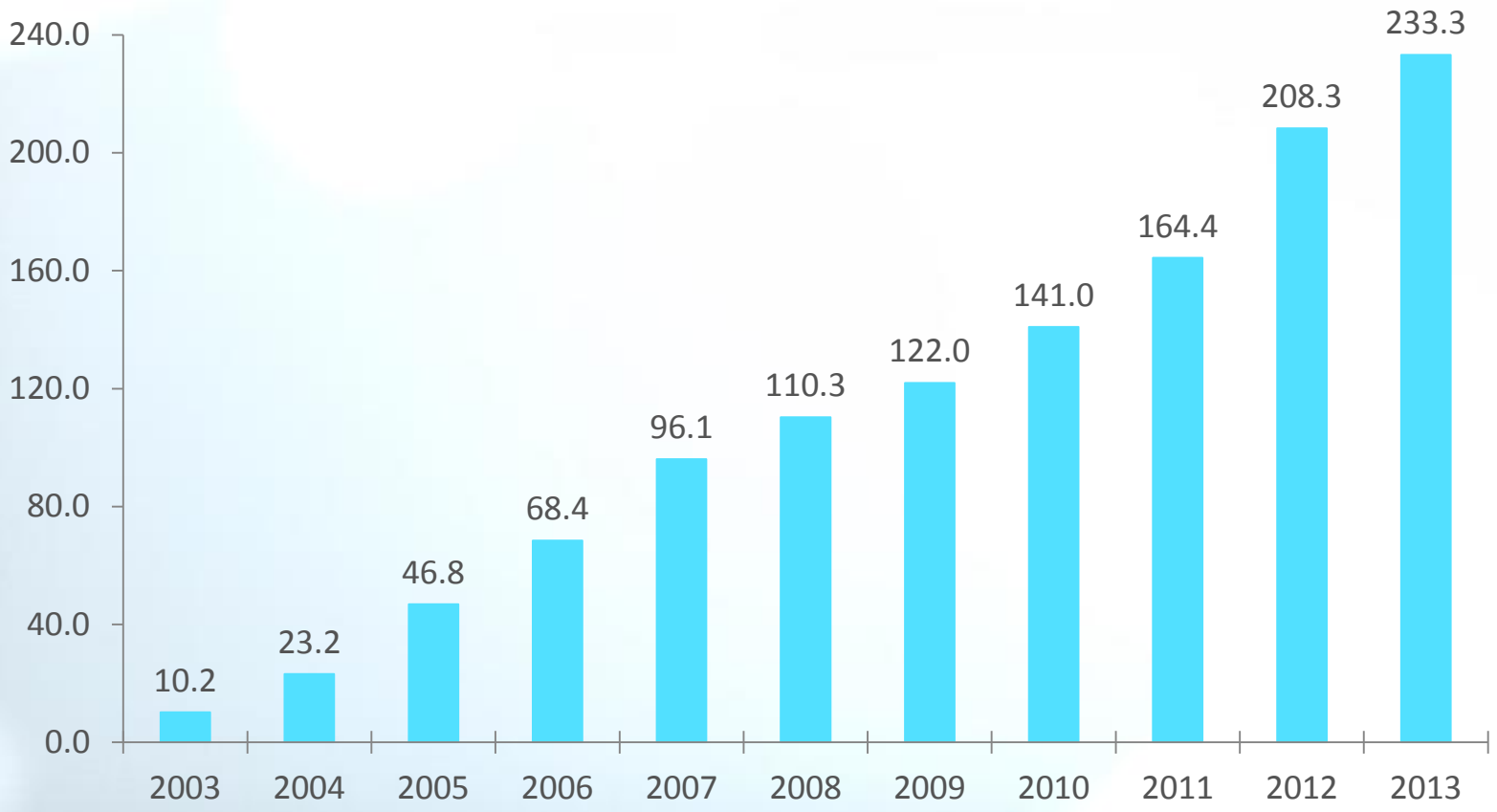
Strong relationship with Apple, Google & others



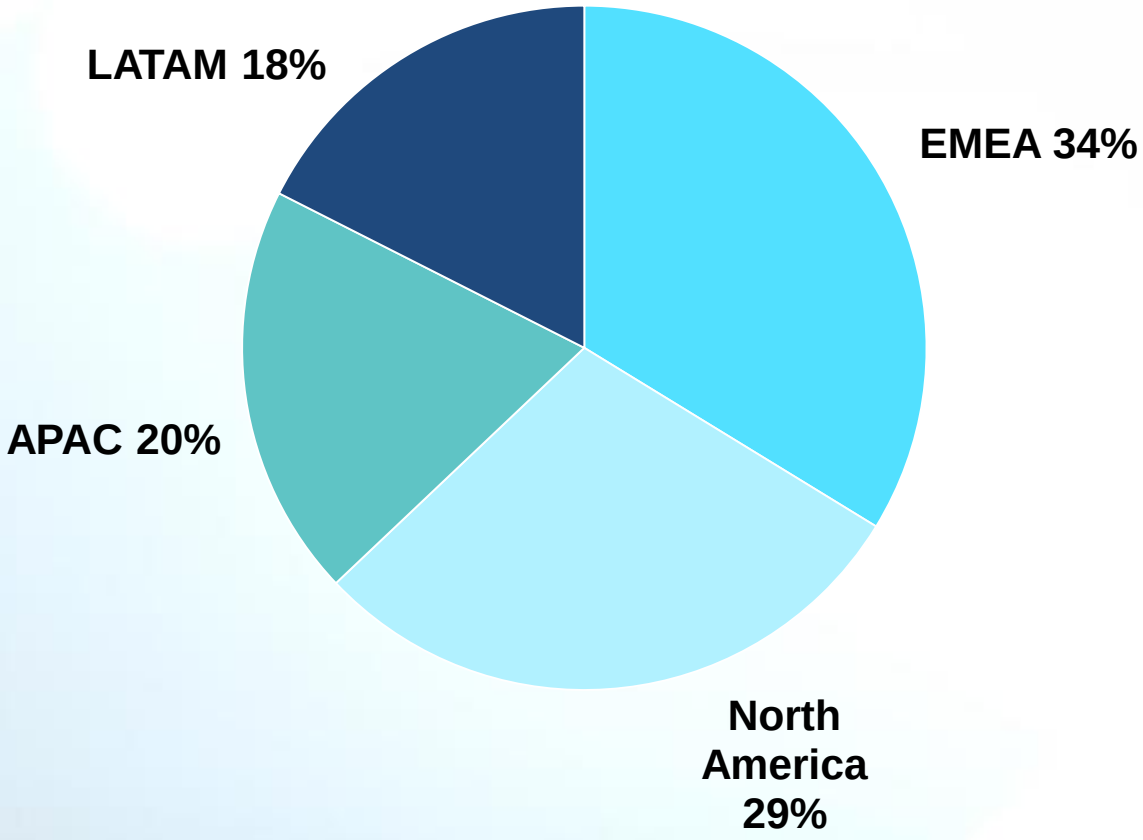


FINANCIALS

Rapid and steady organic growth

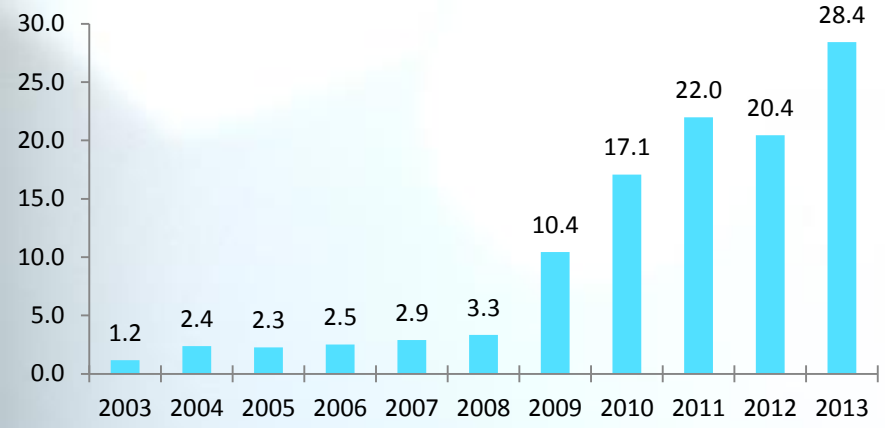


Q1 2014 sales per region

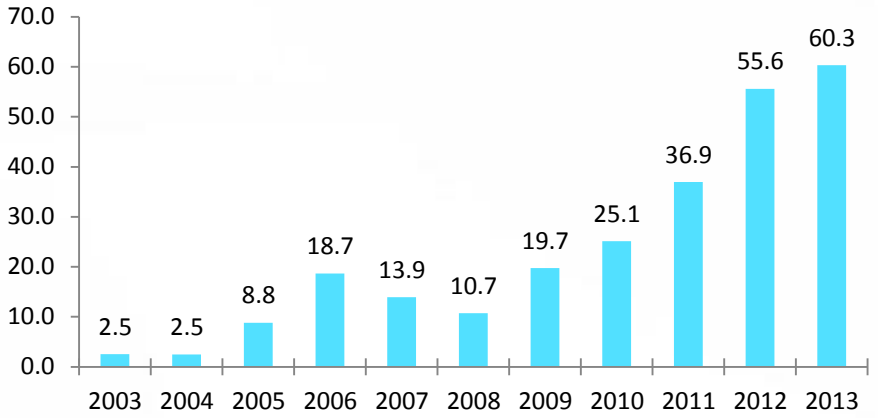


Key Financial Indicators

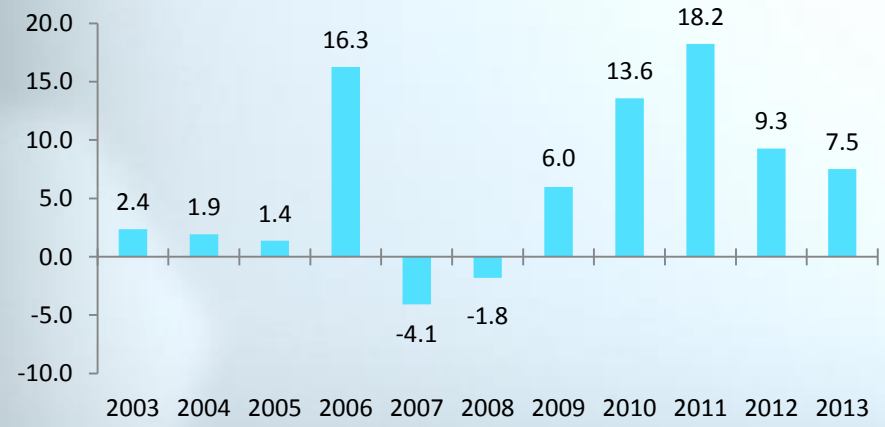
EBIT (m€)



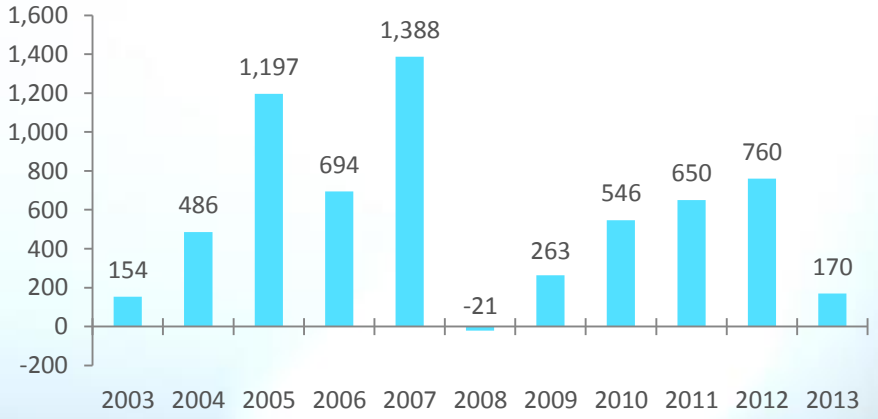
Net Cash (m€)



Net Profit (m€)



Additional headcount



Profit & Loss Account

M€	2013	% of sales	2012	% of sales
Sales	**233.3**		**208.3**	
Cost of sales	- 40.5	*-17%*	- 32.6	*-16%*
Gross margin	**192.8**	***83%***	**175.8**	***84%***
R&D	- 106.8	*-46%*	- 103.1	*-49%*
Sales & Marketing	- 36.1	*-15%*	- 35.5	*-17%*
Administration	- 20.9	*-9%*	- 17.2	*-8%*
Other expenses	-0.4	*0%*	0.5	*0%*
Current operating income	**28.4**	***12%***	**20.4**	***10%***
Stock-based compensation	- 3.5	*-2%*	- 4.0	*-2%*
Other operating revenues & expenses	- 1.3	*-1%*	- 1.6	*-1%*
Operating income	**23.6**	***10%***	**14.9**	***7%***
Net financial income	- 7.5	*-3%*	- 0.5	*0%*
Net income before tax	**16.1**	***7%***	**14.3**	***7%***
Income tax	-8.5	*-4%*	- 5.0	*-2%*
Net income (group share)	**7.5**	***3%***	**9.3**	***4%***

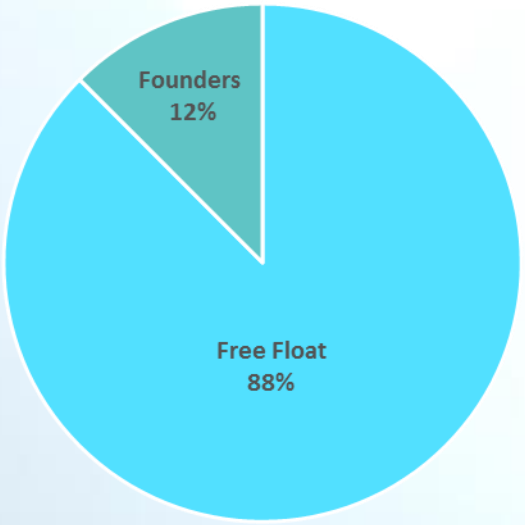
Balance Sheet

ASSETS (M€)	31/12/13	31/12/12
Intangible assets	8.1	10.5
Tangible assets	16.4	9.1
Non-current financial assets	6.7	6.6
Tax assets	11.2	12.9
Total non-current assets	**42.5**	**39.1**
Client receivables	62.8	59.7
Other receivables	20.6	20.5
Cash	61.8	55.7
Total current assets	**145.2**	**135.8**
TOTAL	**187.7**	**175.0**
LIABILITIES (M€)		
Capital	92.8	89.8
Reserves	36.0	28.9
Net profit	7.5	9.3
Shareholders' equity	**136.3**	**128.0**
Non-current liabilities	4.3	4.4
Current liabilities	47.1	42.6
TOTAL	**187.7**	**175.0**

Cash Flow Statement

M€	2013	2012
Net income	7.5	9.3
Depreciation & provisions	13.6	16.4
Stock based compensations	3.5	4.0
Capitalized R&D	-0.8	-1.4
Deferred tax and others	2.1	0.1
Operating cash flow before working capital	**25.9**	**28.3**
Change in working capital	-1.4	-8.8
Operating cash flow	**24.5**	**19.5**
CAPEX	-16.5	-6.9
License acquisitions	-6.1	-5.5
Others	-0.4	-0.1
Free cash flow	**1.5**	**6.9**
Capital increase in relation to stock options	10.0	13.2
Share buy-back	-6.2	0.0
Effect of exchange rate changes	-0.5	-1.5
Change in net cash	**4.7**	**18.7**

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 84,028,824 (28/02/14)

Sector: Software

Identification Codes

ISIN: FR0000079600

Ordinary shares Mnemo: GFT

ADR ticker: GLOFY

PR Contact

Heather Cosby (US)
+1 (646) 203-8643
Email: Heather.Cosby@gameloft.com

Stéphanie Cazaux-Moutou (France)
Tel : + 33 (0)1 58 16 21 55
Email: stephanie.cazaux-moutou@gameloft.com

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.

