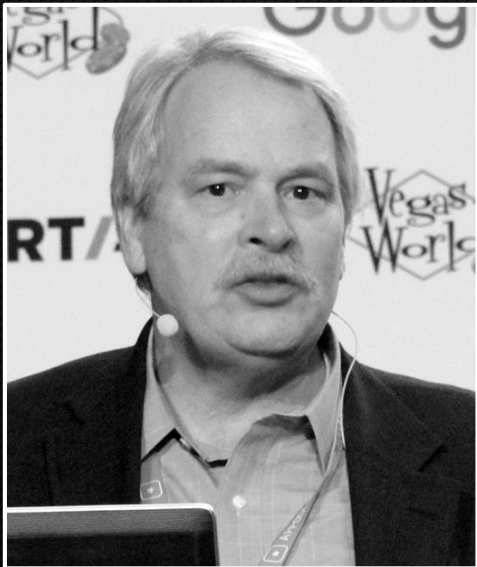




focus

HOME INTERACTIVE

ANNUAL RESULTS
2017-2018



JÜRGEN GOELDNER
Chairman of the Management Board



DEBORAH BELLANGÉ
Vice-Chairman & CFO

**The management board
is also composed of...**



LUC HENINGER
Director of
Production



JOHN BERT
Director of
Business & Sales



THOMAS BARRAU
Director of
Marketing





focus

HOME INTERACTIVE

PART 1 :
AN ATTRACTIVE
MODEL BASED ON
VALUE

THE KEY TO SUCCESS IN VIDEO GAMES INDUSTRY TODAY



1

Generating value from high-potential licences
A capacity for creating new ones



2

Agile organization tailored for the ecosystem



3

Limited financial risks with studios



4

A digital and community-based culture to promote games



5

A global distribution and a presence on digital platforms

**> FOCUS HOME INTERACTIVE
ALL THE KEY ASSETS FOR SUCCESS**

OUR BUSINESS: SUPPORTING STUDIOS FROM PRODUCTION TO SALES

DESIGN



DEVELOPMENT STUDIOS



PUBLISHING



PROJECT SELECTION

Fewer than **1%** of projects selected



PRODUCTION FOLLOW-UP

Over **50** production staff



DIGITAL AND OFFLINE MARKETING



SALES

Over **290** digital promotions in 2017

DISTRIBUTION



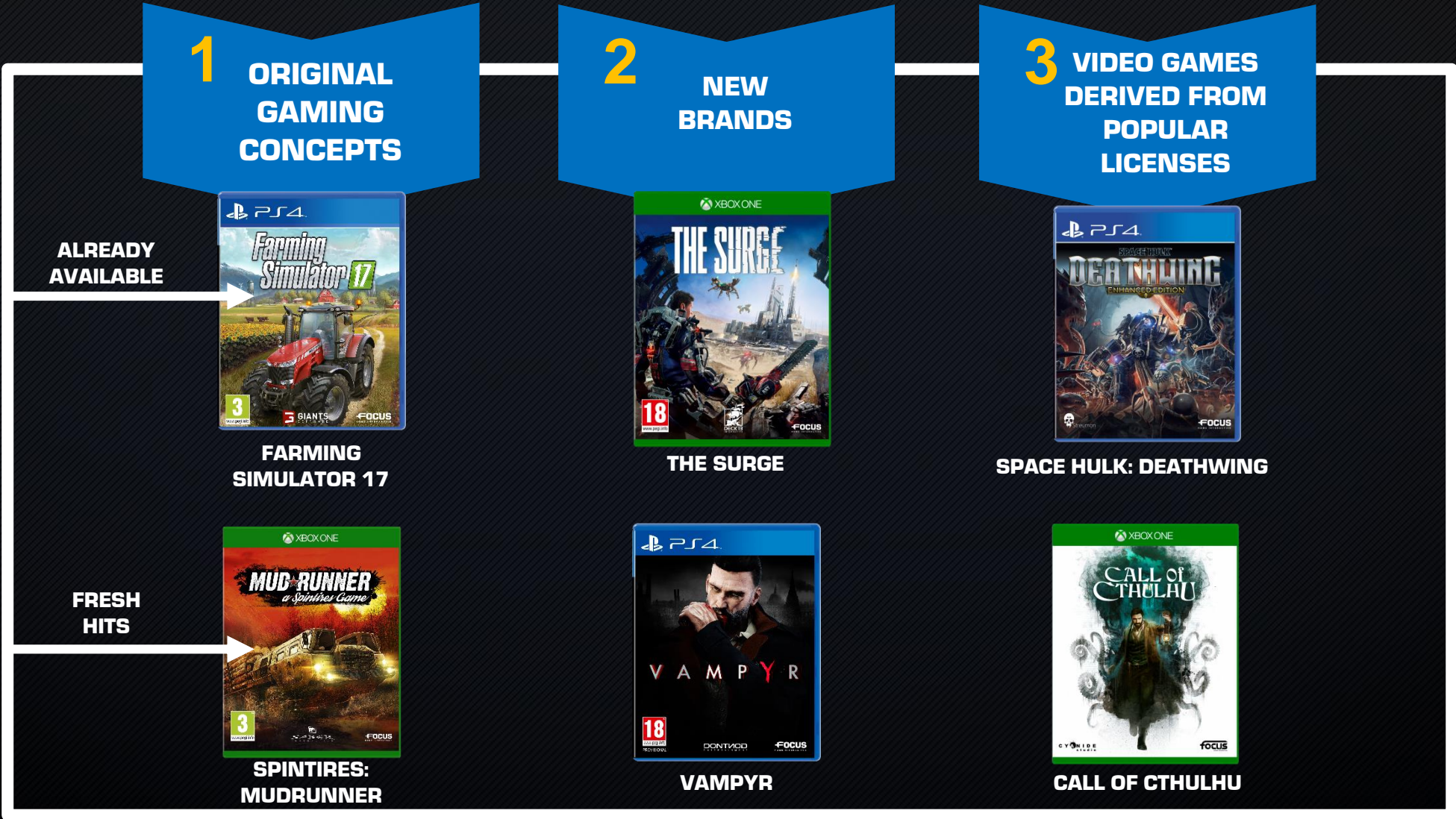
Retail & Digital platforms

Nearly

100

distributors worldwide

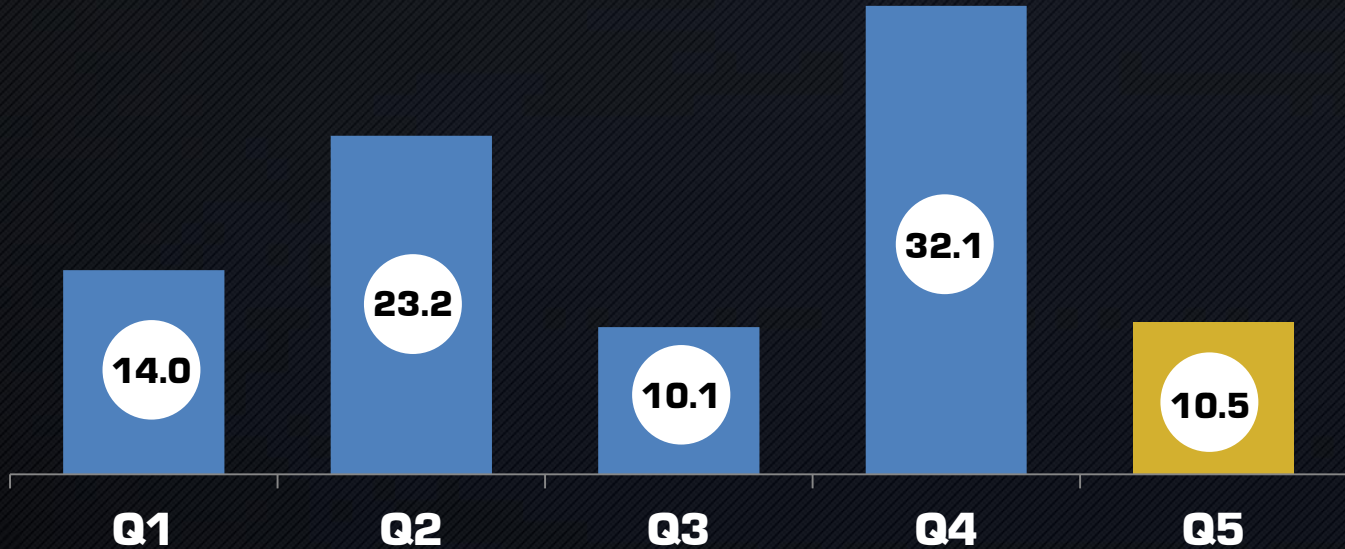
GENERATING VALUE FROM HIGH-POTENTIAL LICENCES





PART 2: A SUCCESSFUL YEAR IN SPITE OF TWO MAJOR SHIFTS

15 MONTHS FY 2017/18 REVENUE



FY 2017/18
REVENUE
€89.9m



THE SURGE: A COMMERCIAL HIT



THE SURGE

16th May 2017

PlayStation 4, Xbox One, PC



THE SURGE FIRE & ICE WEAPON PACK

10th October 2017

PlayStation 4, Xbox One, PC



THE SURGE A WALK IN THE PARK

5th December 2017

PlayStation 4, Xbox One, PC

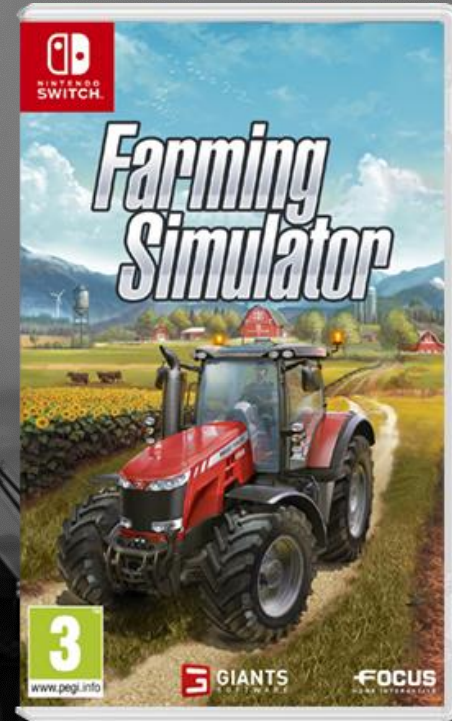


THE SURGE CUTTING EDGE PACK

18th April 2018

PlayStation 4, Xbox One, PC

Farming Simulator



2017: A PROSPEROUS YEAR FOR FARMING SIMULATOR

Farming Simulator released for the new Nintendo Switch

Platinum extension out for all Farming Simulator 17 owners on PC, PlayStation 4 and XBOX One


New edition of Farming Simulator 15 out at Christmas in the Sony and Microsoft Best Seller collections



SPINTIRES: MUDRUNNER, A NEW KEY TITLE FOR THE GROUP

Nearly
1,000,000
Copies sold

DEVELOPER: SABER INTERACTIVE
RELEASE DATE: 31 OCTOBER 2017
CATEGORY: SIMULATION

MUD★RUNNER
a Spintires Game

FOCUS
HOME INTERACTIVE

2017-2018 BEST SALES SPLIT

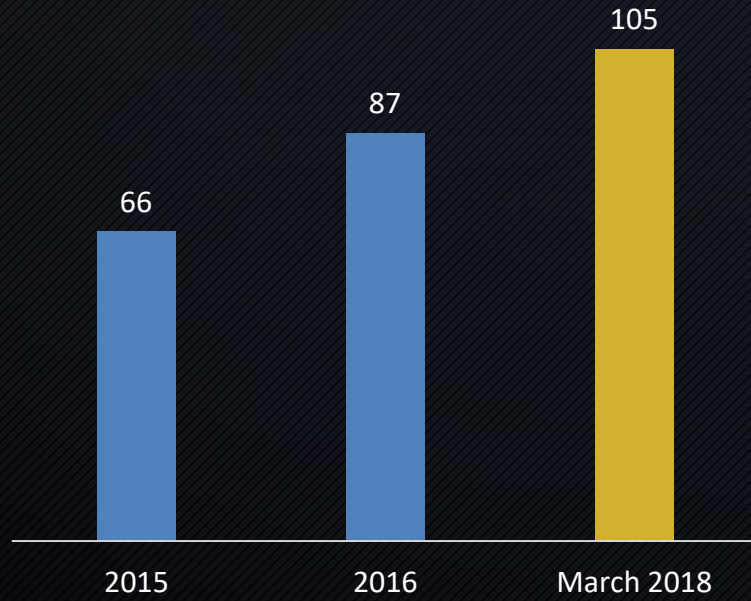
31 march 2018	
Game	% of sales
Spintires MudRunner	16%
Special Editions & Add-ons	14%
The Surge	12%
Styx 2	5%
Tour de France 2017	3%
Other New Titles	8%
Back Catalog ⁽¹⁾	42%

31 december 2016	
Game	% of sales
Farming Simulator 17	42%
The Technomancer	7%
Battlefleet Gothic: Armada	6%
Tour de France 2016	4%
Space Hulk PC	3%
Special Editions & Add-ons	1%
Other New Titles	2%
Back Catalog ⁽¹⁾	35%

(1) Sales generated by titles released before the fiscal year in progress

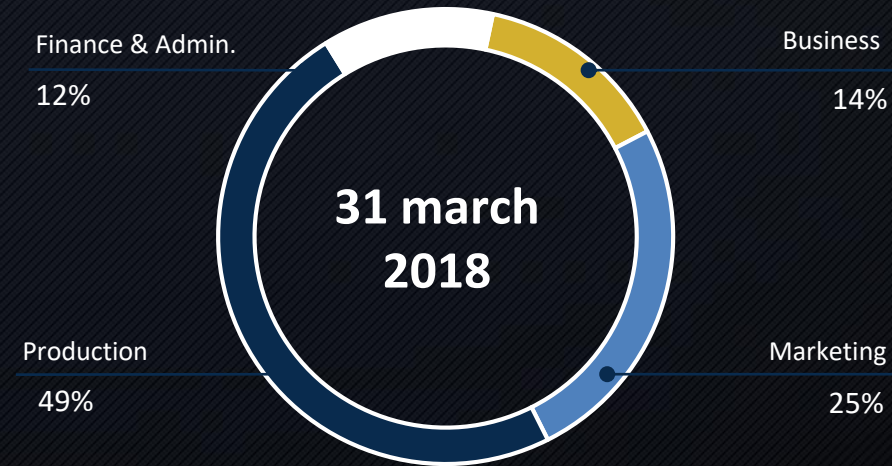
STRENGTHENING TEAMS

Headcounts



* FTE closing date

Team distribution (31 March 18)



focus

HOME INTERACTIVE



PART 3: 2017-2018 RESULTS 16

REVENUE BREAKDOWN OVER 15 MONTHS

INTERNATIONAL REVENUE (IN %)

INTERNATIONAL REVENUE
89%

VS

FRANCE
11%

DIGITAL REVENUE (IN %)

DIGITAL PLATFORM
64%

VS

RETAIL
36%

REVENUE IN BACK-CATALOGUE* (IN %)

NEW RELEASES
58%

VS

BACK CATALOGUE
42%

* Games launched before 1st january 2017

Profit & Loss <i>Consolidated financial statements under French GAAP</i>	31/03/2018 (*) (15 months)	31/12/2016 (12 months) <i>Audited</i>	31/03/2018 (**) (12 months)
Sales	89.9	75.6	75.9
<i>Studio costs</i>	-49.7	-40.8	-41.1
<i>Manufacturing and ancillary costs</i>	-13.0	-10.4	-10.8
Gross margin	27.2	24.4	24.0
<i>% of revenue</i>	30.2%	32.3%	31.6%
<i>Personnel expenses</i>	-8.7	-7.0	-7.2
<i>Other operating costs</i>	-9.0	-8.2	-7.2
Operating income	9.5	9.2	9.6
<i>% of revenue</i>	10.6%	12.1%	12.6%
Group net income	6.5	5.9	
<i>% of revenue</i>	7.2%	7.8%	

(*)The audit procedures have been performed. The reports will be issued after finalization of the procedures required for the purposes of the publication of the annual financial report

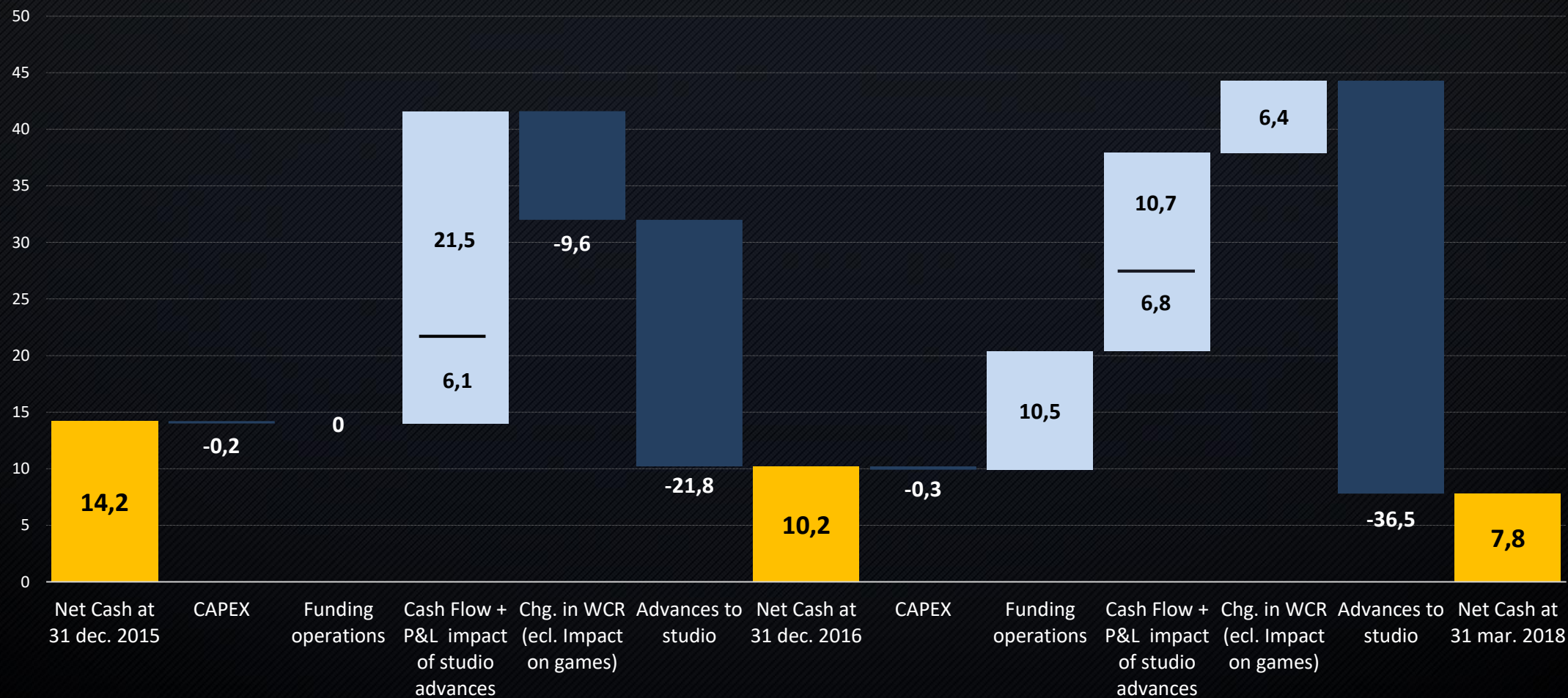
(**) The Group changed its fiscal year and presented its closed accounts to the March 31, 2018 over a 15 months period, it is presented a comparable of 12 months (period from 1/4/2017 to 31/3/2018).

BALANCE SHEET

ASSETS in €m		LIABILITIES in €m	
<i>Consolidated financial statements under French GAAP</i>		<i>Consolidated financial statements under French GAAP</i>	
	31 march 2018		31 march 2018
	(*)		(*)
Fixed assets	0.9	Total Equity	43.2
Inventories and works in progress	0.7	Provisions	0.4
Accounts receivable and related accounts	6.9	Borrowings and financial liabilities	1.8
Other receivables, prepayments and accrued income	43.0	Accounts payable and related accounts	11.4
Cash & short-term investment securities	9.6	Other payables, accruals and deferred income	4.3
Total assets	61.1	Total liabilities	61.1

(*)The audit procedures have been performed. The reports will be issued after finalization of the procedures required for the purposes of the publication of the annual financial report

NET CASH POSITION AT 31 MARCH 2018





PART 4 : OUTLOOK

WHAT'S NEXT - FEBRUARY 2018

2 days of **Press Event** in the city center of Paris
2018-19 Line-up presentation to the Press,
Business Partners and investors.

+140 International media invited (100 millions MUV)

+125 business partners and 42 investors

Over **400 articles** from **14 countries**
US, UK, Germany, Scandinavia, France, Japan, Russia, Switzerland, Spain, Italy,
Poland, Austria, etc...



E3 2018 – CONFIRMATION OF THE QUALITY OF THE LINE-UP



E3 2018

- 230m²** booth
- 10** LIVE SESSIONS ON IGN LIVE, TWITCH LIVE & MIXER LIVE
- 400+** MEDIA OUTLETS
- 800+** MEDIA MEETINGS
- 150+** BUSINESS PARTNER MEETINGS



★★★★☆
9/10

GAMEOVER.GR

★★★★☆
8/10
NERD MUCH?

★★★★☆
8,5/10
DUALSHOCKERS

★★★★☆
9/10

IGN ITALIA

★★★★☆
82/100
GAMEPRO

★★★★☆
9/10

SELECTBUTTON

★★★★☆
8,5/10
PLAYSTATION
LIFESTYLE

★★★★☆
8,5/10

3DJUEGOS

★★★★☆
8,5/10
GAMINGTREND

★★★★☆
8/10
HARDCOREGAMER

VAMPYR

★★★★☆
87/100
MILLENIUM

★★★★☆
9/10

GAMECRITICS

★★★★★
10/10

N3RDABL3

★★★★☆
8/10
IGN SPAIN

★★★★☆
8/10
MULTIPLAYER.IT

★★★★☆
88/100

COGCONNECTED

★★★★☆
8/10
GAMESPEW

★★★★☆
88/100
HOBBY CONSOLAS

★★★★☆
9/10
GAMESKINNY

★★★★☆
8,9/10
RPG FAN

★★★★☆
8/10
TRUSTED REVIEWS

VAMPYR: BIG LAUNCH, GREAT SUCCESS



Source : GSD (Game Sales Data)

Top 5 - Semaine 23

450,000

sold through in 1 month

At the top of the charts !

N°1 in Germany

N°1 in UK

N°1 in Scandinavia

N°1 on Amazon

N°1 on Steam

In **Top 3** of many countries

Global Top Sellers

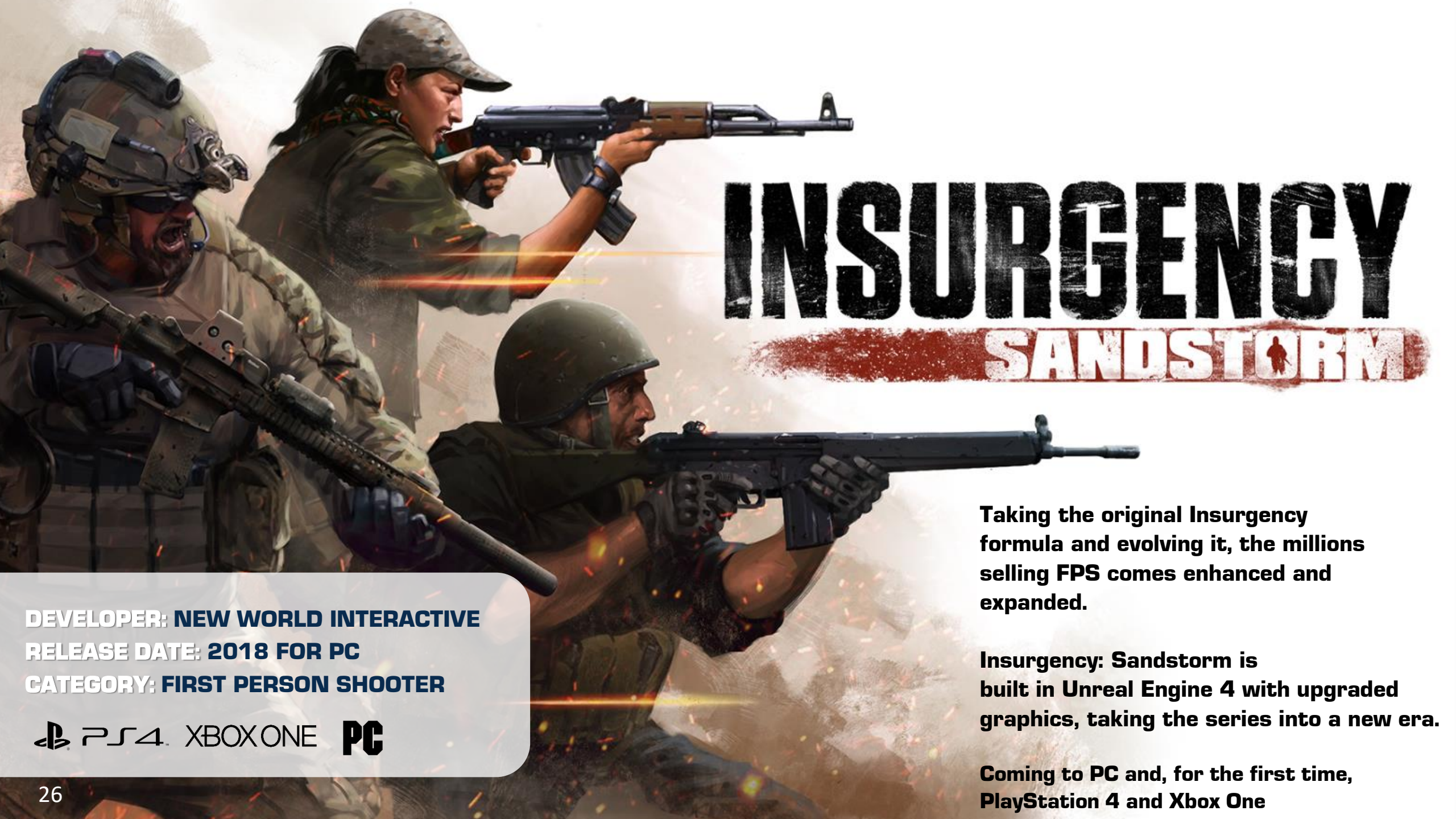
Windows

enter search term or tag

Search

Sort by Relevance

	Vampyr	5 Jun, 2018		49,99€
	PLAYERUNKNOWN'S BATTLEGROUNDS	21 Dec, 2017		29,99€
	Warhammer 40,000: Inquisitor - Martyr	5 Jun, 2018	-10%	49,99€ 44,99€
	Raft	23 May, 2018		19,99€
	Jurassic World Evolution	12 Jun, 2018		54,99€
	Tom Clancy's The Division™	8 Mar, 2016	-80%	49,99€ 9,99€
	Rocket League®	7 Jul, 2015		19,99€



INSURGENCY

SANDSTORM

DEVELOPER: NEW WORLD INTERACTIVE

RELEASE DATE: 2018 FOR PC

CATEGORY: FIRST PERSON SHOOTER

 PS4  XBOX ONE 

Taking the original Insurgency formula and evolving it, the millions selling FPS comes enhanced and expanded.

Insurgency: Sandstorm is built in Unreal Engine 4 with upgraded graphics, taking the series into a new era.

Coming to PC and, for the first time, PlayStation 4 and Xbox One

CALL of CTHULHU

DEVELOPER: CYANIDE STUDIO

RELEASE DATE: 2018

CATEGORY: ADVENTURE HORROR

PS4 XBOX ONE **PC**

Plunge into Call of Cthulhu, the official videogame inspired by Chaosium's classic pen and paper RPG. Uncover the chilling mysteries of this investigation horror game, descending deep into a world of cosmic horrors, creeping madness, and shrouded Old Gods within Lovecraft's iconic universe.

Farming Simulator 19



DEVELOPER: GIANTS SOFTWARE

RELEASE DATE: 2018

CATEGORY: SIMULATION

 PS4  XBOX ONE 

***FARM LIKE
NEVER BEFORE***

<https://www.usgamer.net/articles/fans-reactions-to-john-deere-tractors-in-farming-simulator-2019-is-the-cutest-thing>

FEAR THE WOLVES: WHEN BATTLE ROYALE MEETS TCHERNOBYL BY S.T.A.L.K.E.R. CREATORS

DEVELOPER: **VOSTOK GAMES**

RELEASE DATE: **EARLY ACCESS 2018**

CATEGORY: **FPS**



“Stalker's DNA stops Fear the Wolves from being another PUBG clone, it sounds like it will genuinely innovate.”



MUDRUNNER: AMERICAN WILDS

Spiritires Game

MUD★RUNNER

AMERICAN WILDS



DEVELOPER: **SABER INTERACTIVE**

RELEASE DATE: **2018**

CATEGORY: **OFF ROAD SIMULATION**

 PS4  XBOX ONE  NINTENDO SWITCH 

A PLAGUE TALE: INNOCENCE – AN EMOTIONAL JOURNEY IN A BRUTAL AND UNFORGIVING WORLD

*"The most harrowing game we've previewed in years"
/ "As moving as it is horrific"*



A PLAGUE TALE
INNOCENCE

DEVELOPER: ASOBO STUDIO

RELEASE DATE: 2019

CATEGORY: ACTION/AVENTURE

 PS4  XBOX ONE  PC

A PLAGUE TALE
INNOCENCE

*« One of the most
oppressive, bleak and
hostile environments
ever realised by the
medium" / "superbly
polished and visually
arresting»*



« Spectacular »



INSPIRED BY GORGEOUS BAROQUE AESTHETIC AND INTRIGUING STORYLINE



DEVELOPER: SPIDERS INTERACTIVE

RELEASE DATE: 2019

CATEGORY: RPG

PS4 XBOX ONE PC

GREEDFALL

THE SURGE 2

"The Surge 2 Is One Of E3's Biggest Surprises."
Game Informer

DEVELOPER: **DECK 13**

RELEASE DATE: **2019**

CATEGORY: **HARDCORE ACTION/RPG**

 PS4.  XBOX ONE  PC

2018/2019 SCHEDULED RELEASES

End of production	Title	Platforms
Q3 2018	Fear The Wolves	Early Access PC
Q3 2018	Insurgency: Sandstorm	PC
Q3 2018	MudRunner: American Wilds Edition	PC & Consoles
Q4 2018	BattleFleet Gothic: Armada 2	PC
Q4 2018	MudRunner	Nintendo Switch
Q4 2018	Space Hulk: Tactics	PC & Consoles
Q4 2018	Call Of Cthulhu	PC & Consoles
Q4 2018	Farming Simulator 19	PC & Consoles
2019	Fear The Wolves	PC & Consoles
2019	Insurgency: Sandstorm	Consoles
2019	A Plague Tale: Innocence	PC & Consoles
2019	GreedFall	PC & Consoles
2019	The Surge 2	PC & Consoles
2019	Necromunda	PC & Consoles

SHARE PRICE AND CAPITAL BREAKDOWN

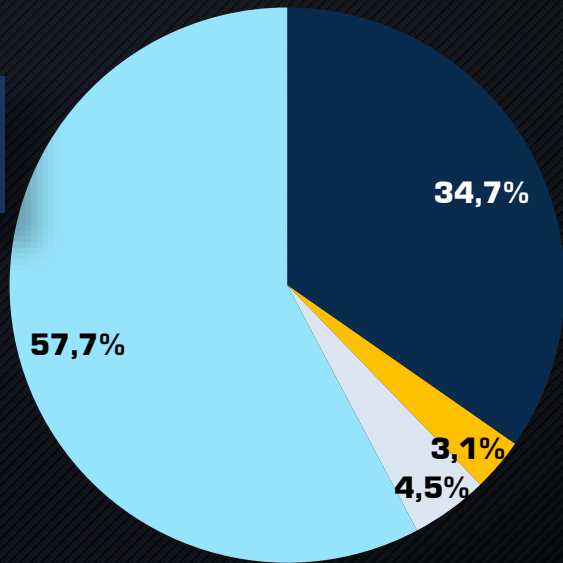
Share price performance
(From 4 January 2016 to 3 July 2018)

ALFOC
EURONEXT
GROWTH



3 July 2018
27,7 €

Capital Breakdown
At 30 June 2018



- Nabuboto
- Innelec
- Managers, employees and others
- Free float

Q1 Sales 2018-2019

26 July 2018

Q2 Sales 2018-2019

25 october 2018

Half Year Results & Q3 Sales 2018-2019

24 january 2019



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