



H1 2018/2019 EARNINGS
& REVENUE Q3 2018/2019

January 24, 2019

A PROVEN MODEL

DESIGN



DEVELOPMENT STUDIOS



PUBLISHING



PROJECT SELECTION

Fewer than **1%** of projects selected



PRODUCTION FOLLOW-UP

Over **50** production staff



DIGITAL & OFFLINE MARKETING



SALES

Over **290** digital promotions in 2017

DISTRIBUTION



Retail & Digital platforms

Nearly

100

distributors worldwide

A PROVEN MODEL | GENERATING VALUE FROM HIGH-POTENTIAL LICENCES

ORIGINAL
GAMING
CONCEPTS



FARMING SIMULATOR 19

NEW
BRANDS



THE SURGE

POPULAR
LICENSES



WORLD WAR Z



MUDRUNNER



VAMPYR



CALL OF CTHULHU

1. PERFORMANCE H1 2018/2019

RECORD SALES

2. FINANCIAL RESULTS H1 2018/2019

STRONG RESULTS

3. OUTLOOK

TOP LINE PERFORMANCE: EXCEEDING €100M SALES

ACTIVITY H1 2018/2019 | NOMINATIONS & REORGANIZATION

NOMINATIONS



JURGEN GOELDNER
CHAIRMAN OF
THE MANAGEMENT BOARD

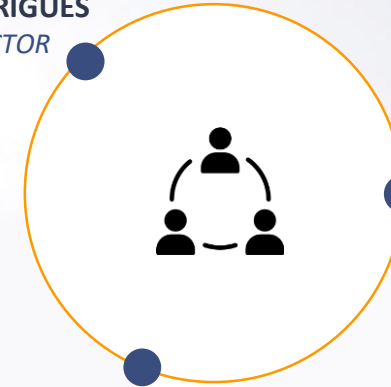


JOHN BERT
CHIEF OPERATING OFFICER
(PREVIOUSLY DIRECTOR OF
BUSINESS & SALES)

AURELIE RODRIGUES
SALES DIRECTOR



THOMAS BARRAU
NEW MEMBER OF THE
MANAGEMENT BOARD



DESSIL BASMADJIAN
CREATIVE DIRECTOR

VINCENT CHATAIGNIER
BUSINESS DEVELOPMENT
DIRECTOR

REORGANIZATION



**MANAGEMENT
PACKAGE**



REORGANIZATION



**GREEN LIGHT
PROCESS**

VAMPYR | AN ACCLAIMED AA GAME – A COMMERCIAL SUCCESS



GLOBAL BEST-SELLER BOTH ON RETAIL STORES AND DIGITAL PLATFORMS

Rank	Game Title	Price	Reviews
1.	Vampyr - [Playstation 4]	EUR 54,99	118
2.	Detroit: Become Human...	EUR 77,99	118
3.	FIFA 18 - Standard...	EUR 32,50	1.230
4.	Far Cry 5 - Standard...	EUR 59,00	157
5.	God of War - Standard...	EUR 58,99	163
6.	Call of Duty Black Ops 4	EUR 69,99	-

Game Title	Release Date	Discount	Price
VAMPYR	5 Jun. 2018	-10%	44,99€
PLAYERUNKNOWN'S BATTLEGROUNDS	21 Dec. 2017	-	29,99€
Raft	23 May. 2018	-	19,99€
Total War: WARHAMMER II	28 Sep. 2017	-25%	44,99€
Total War: WARHAMMER	24 May. 2016	-75%	14,99€
Jurassic World Evolution	12 Jun. 2018	-	54,99€
Starbound	22 Jul. 2016	-40%	8,39€
Warhammer 40,000: Inquisitor - Martyr	31 Aug. 2017	-10%	44,99€
The Forest	30 Apr. 2018	-	16,79€

GLOBAL CONSOLE BEST-SELLER

#1 UNITED STATES #1 FRANCE
#1 UK #1 GERMANY...

GLOBAL PC BEST-SELLER

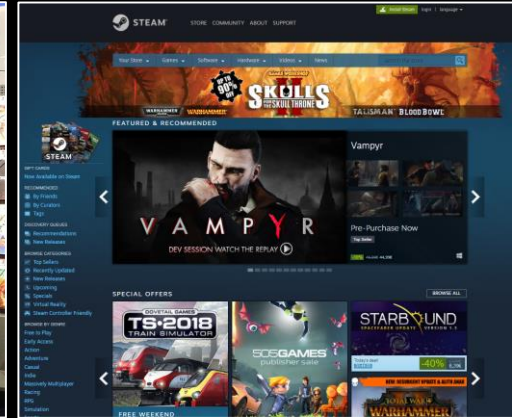
#1 STEAM

RELEASED JUNE 2018

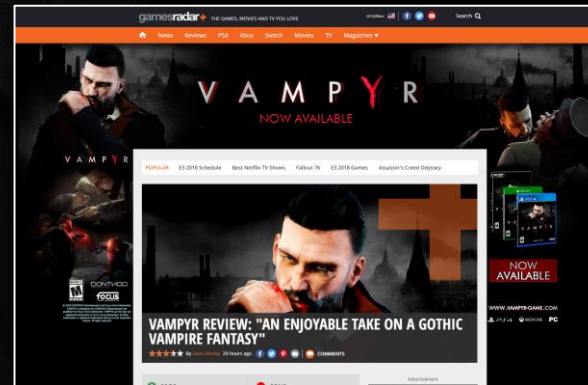


VAMPYR | AN ACCLAIMED AA GAME – A COMMERCIAL SUCCESS

STRONG AND GLOBAL VISIBILITY ON RETAIL AND DIGITAL STORES



STRONGEST MEDIA CAMPAIGN FOR A FOCUS TITLE



Including TV, digital and social media, print ads, radio, street marketing, First party support, etc.

TRADE SHOW PRESENCE EVERYWHERE IN THE WORLD



What's Next, E3 Los Angeles, Gamescom Cologne, Paris Games Week, etc.

RELEASED JUNE 2018



FOCUS | PUBLISHER WEEKS

HALF MILLION UNITS SOLD
DURING DEDICATED PUBLISHER WEEKS
ORGANIZED WITH STRATEGIC PARTNERS

PlayStation™ Store Search Cart 1 PS4™

Game Deals

focus
HOME INTERACTIVE
PLAYSTATION WEEK

UP TO 80% OFF
OFFER ENDS 6/12

See All >

OLD MAN'S JOURNEY \$9.99 +\$8.99	METAL GEAR SURVIVE \$39.99 +\$27.99
Shining Resonance REFRAIN	SHAPE OF THE WORLD \$14.99 +\$13.49

STEAM™ MAGASIN COMMUNAUTÉ À PROPOS SUPPORT

Votre magasin Jeux Logiciels Matériel Vidéos Actualités

focus
HOME INTERACTIVE

JUSQU'À **-85%**
DU 20 AU 24 SEPTEMBRE

WEEKEND ÉDITEUR

Sign in Home OneGuide Store

XBOX ONE

focus
HOME INTERACTIVE

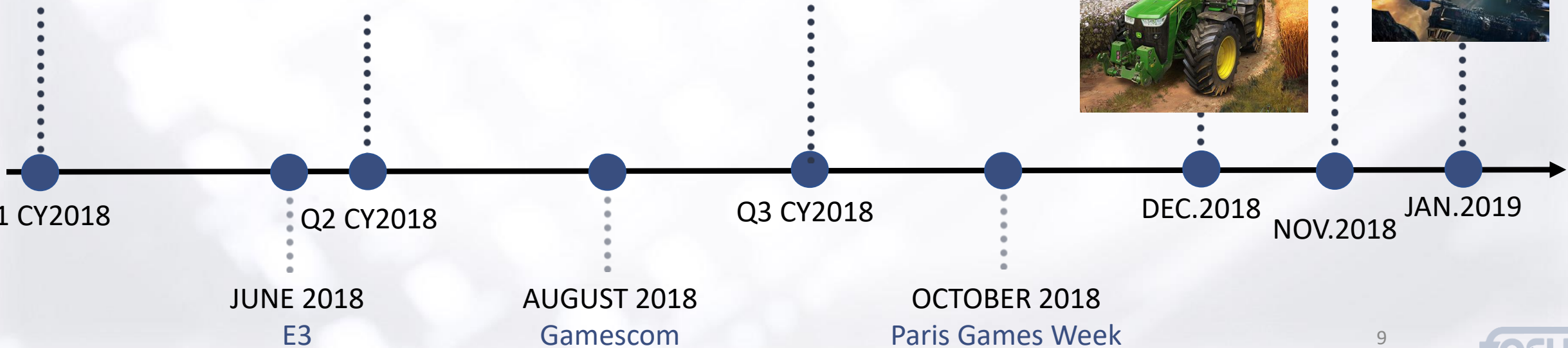
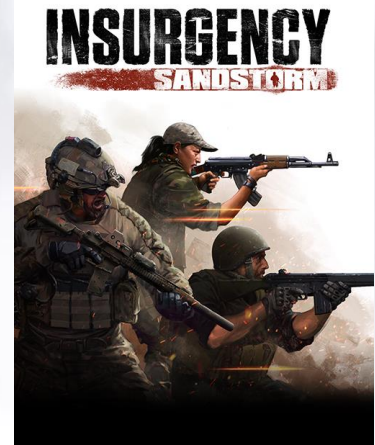
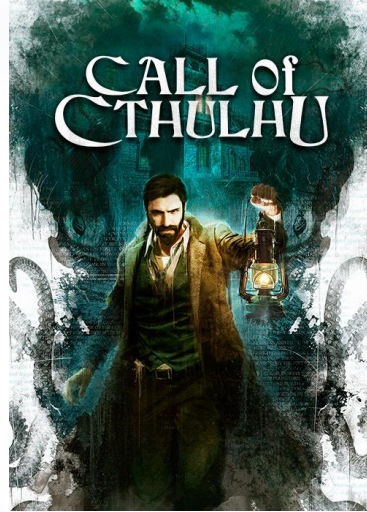
Les soldes Focus Home Interactive
Économisez jusqu'à 67 %

Pre-order Yooba Laylee + Toy Box Trove: Free-to-play MMO action Power Rangers: Mega Battle Rocket League: Play today

☆ Featured Search Memberships Use a code

HALO WARS WORLD OF TANKS WATCH DOGS 2 GOLD EDITION

FOCUS HOME INTERACTIVE | GAME RELEASES



1. PERFORMANCE H1 2018/2019

RECORD SALES

2. FINANCIAL RESULTS H1 2018/2019

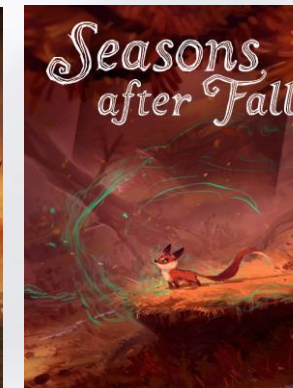
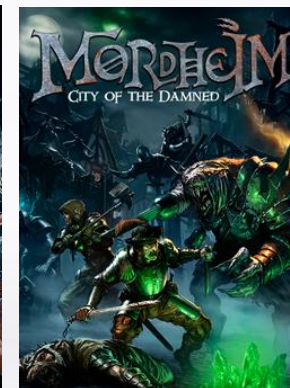
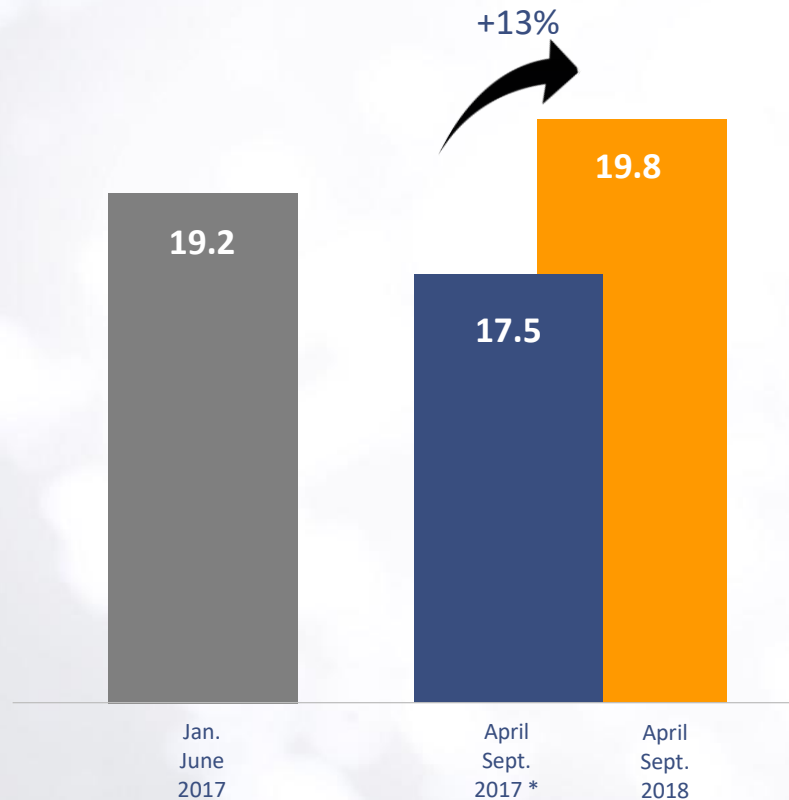
STRONG RESULTS

3. OUTLOOK

TOP LINE PERFORMANCE: EXCEEDING €100M SALES

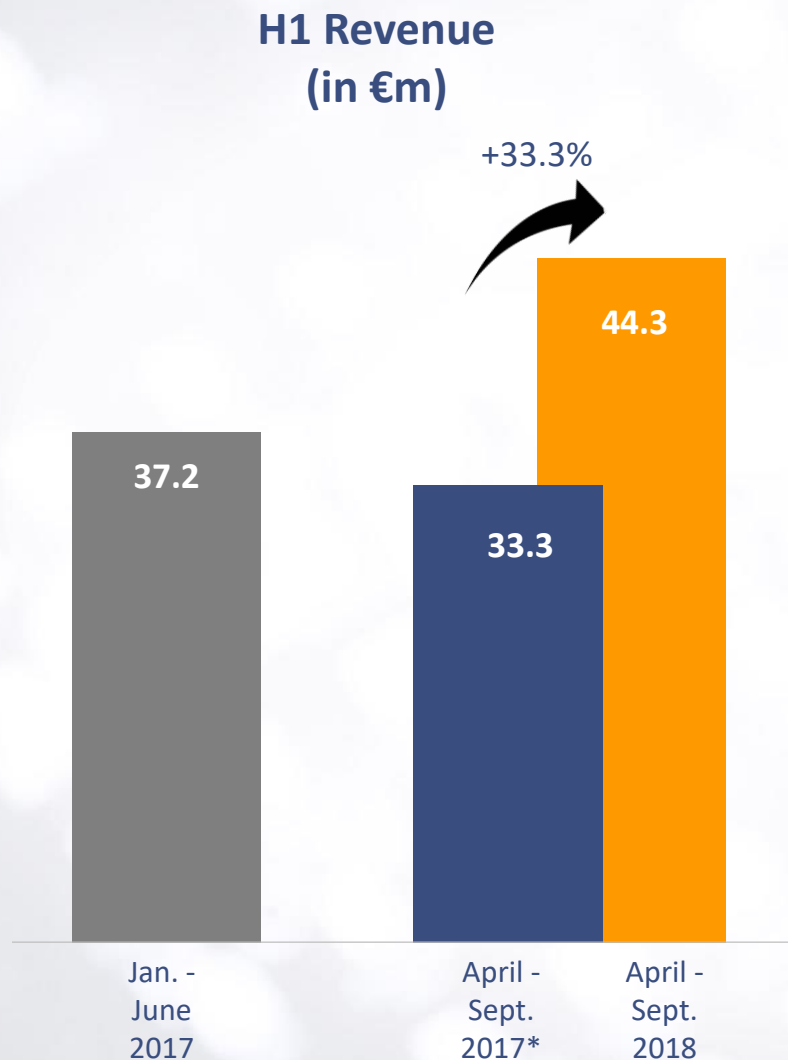
PERFORMANCE H1 2018/2019 | SUCCESSFUL FRANCHISES

PERFORMANCE ON H1 ALSO DRIVEN BY
A STRONG BACK CATALOGUE !



(*) The Group changed its fiscal reporting calendar in 2017 and presented its financial statements at 31 March, numbers are presented with a comparable 6-month period (period from 1/4/2017 to 30/9/2017) which, for 30/09/2017 has not been the subject of an audit or limited review.

FINANCIAL RESULTS H1 2018/2019 | RECORD SALES



INTERNATIONAL REVENUE (IN MILLION EUROS)

INTERNATIONAL REVENUE
91%

vs

FRANCE
9%

DIGITAL REVENUE (IN MILLION EUROS)

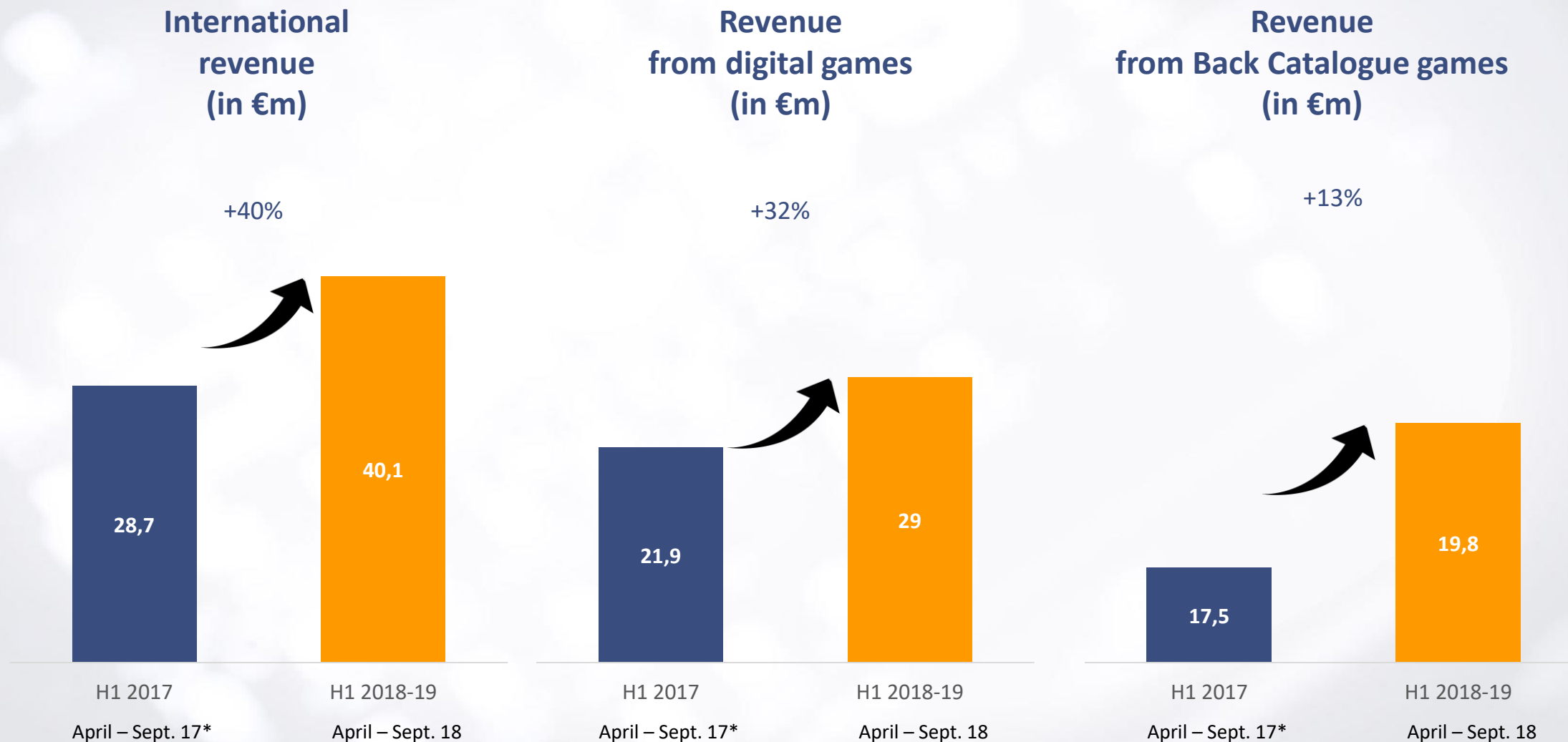
DIGITAL PLATFORM
65%

vs

RETAIL
35%

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FINANCIAL RESULTS H1 2018/2019 | REVENUE SPLIT



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FINANCIAL RESULTS H1 2018/2019 | GEOGRAPHIC BREAKDOWN



FINANCIAL RESULTS H1 2018/2019 | EXCELLENT PERFORMANCE

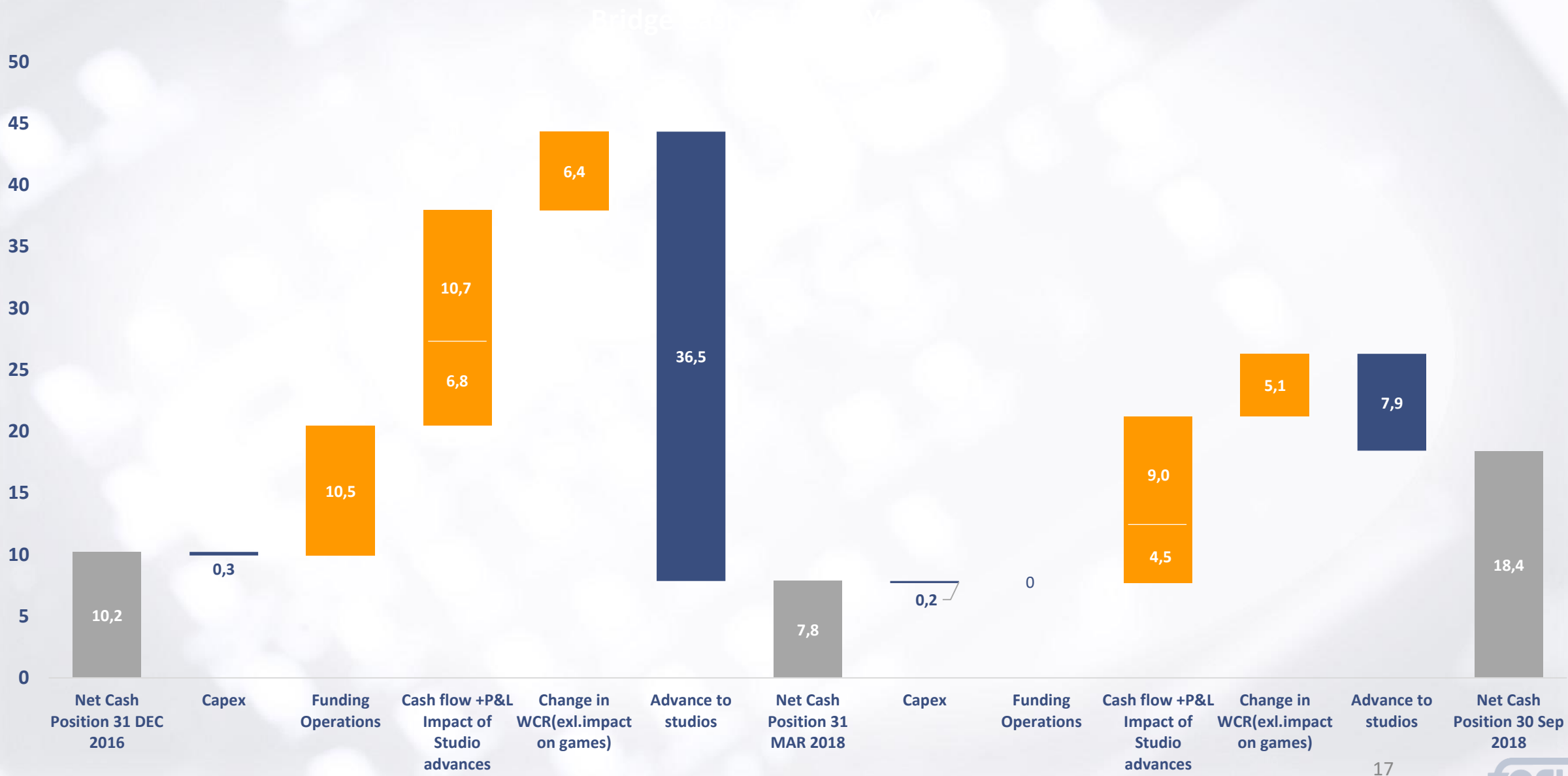
In €m <i>Consolidated financial statements under French GAAP</i>	H1 2018 (April - Sept. 2018) <i>Limited review</i>	H1 2017* (April – Sept. 2017)	H1 2017 (Jan. - June 2017) <i>Limited review</i>
Revenue	44.3	33.3	37.2
<i>Studio royalties</i>	<i>(23.1)</i>	<i>(17.7)</i>	<i>(18.8)</i>
<i>Manufacturing and ancillary costs</i>	<i>(4.8)</i>	<i>(4.5)</i>	<i>(6.0)</i>
Gross margin <i>% of revenue</i>	16.4 37.0%	11.1 33.4%	12.4 33.4%
<i>Personnel expenses</i>	<i>(3.8)</i>	<i>(3.3)</i>	<i>(3.4)</i>
<i>Other operating costs</i>	<i>(5.6)</i>	<i>(4.0)</i>	<i>(4.8)</i>
Operating income <i>% of revenue</i>	7.0 15.8%	3.8 11.6%	4.2 11.2%
Group net income <i>% of revenue</i>	3.3 7.5%	NA NA	2.6 6.9%

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FINANCIAL RESULTS H1 2018/2019 | BALANCE SHEET

ASSETS in €m		LIABILITIES in €m	
<i>Consolidated financial statements under French GAAP</i>		<i>Consolidated financial statements under French GAAP</i>	
	30 Sept. 18		30 Sept. 18
	<i>Limited review</i>		<i>Limited review</i>
Fixed assets	0.9	Total Equity	43.5
Inventories and works in progress	0.6	Provisions	1.3
Accounts receivable and related accounts	7.4	Borrowings and financial liabilities	1.5
Other receivables, prepayments and accrued income	42.8	Accounts payable and related accounts	13.2
Cash & short-term investment securities	19.9	Other payables, accruals and deferred income	12.1
Total assets	71.6	Total liabilities	71.6

FINANCIAL RESULTS H1 2018/2019 | NET CASH POSITION AT SEPT. 30, 2018



1. PERFORMANCE H1 2018/2019

RECORD SALES

2. FINANCIAL RESULTS H1 2018/2019

STRONG RESULTS

3. OUTLOOK

TOP LINE PERFORMANCE: EXCEEDING €100M SALES

MUD★RUNNER

AMERICAN WILDS





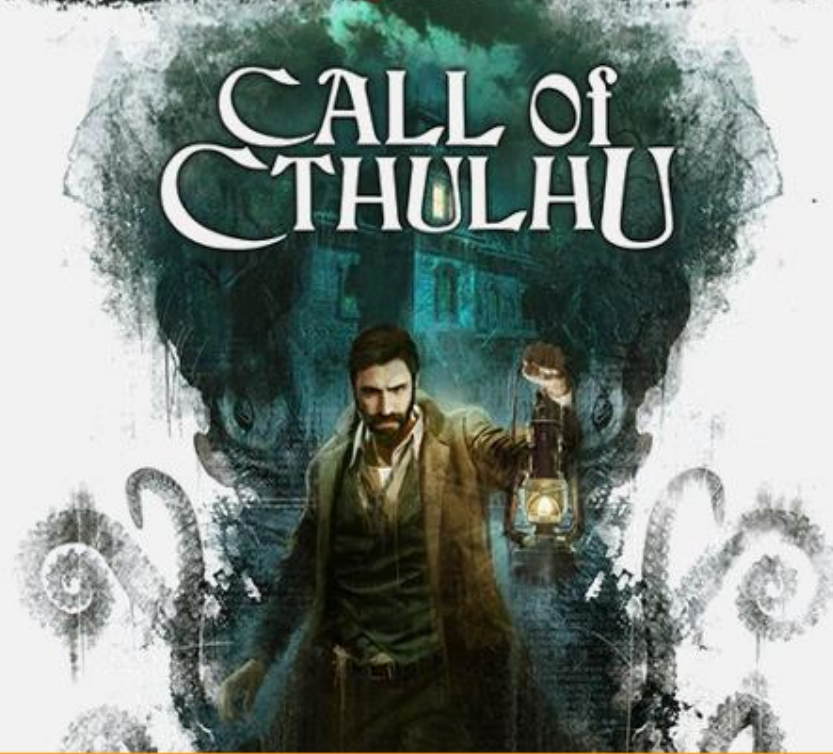
“PERHAPS ONE OF THE FINEST COSMIC HORROR EXPERIENCES IN MODERN GAMING”



★★★★★
8.6/10
IGN

★★★★★
8.5/10
GAMING TREND

★★★★☆
8/10
EXPRESS



★★★★★
9/10
SCREENRANT

★★★★★
85/100
GAMESTAR

★★★★☆
8/10
SPAZIOGAMES

RELEASED JUNE 2018



FARMING SIMULATOR 19 | ALWAYS BIGGER AUDIENCE REACHED

1,000,000

Copies sold in the first 10 days after launch



RELEASED NOVEMBER 2018 ON PLAYSTATION 4, XBOX ONE AND PC



COVERAGE ON NATIONAL TV CHANNELS
(TF1, France TV, M6...)



LIVE ACTION TV AD BROADCAST
IN MULTIPLE COUNTRIES AROUND THE WORLD

INSURGENCY: SANDSTORM | A NEW REFERENCE OF THE GENRE



« A Goddamn Work of Art »

ROCK PAPER
SHOTGUN

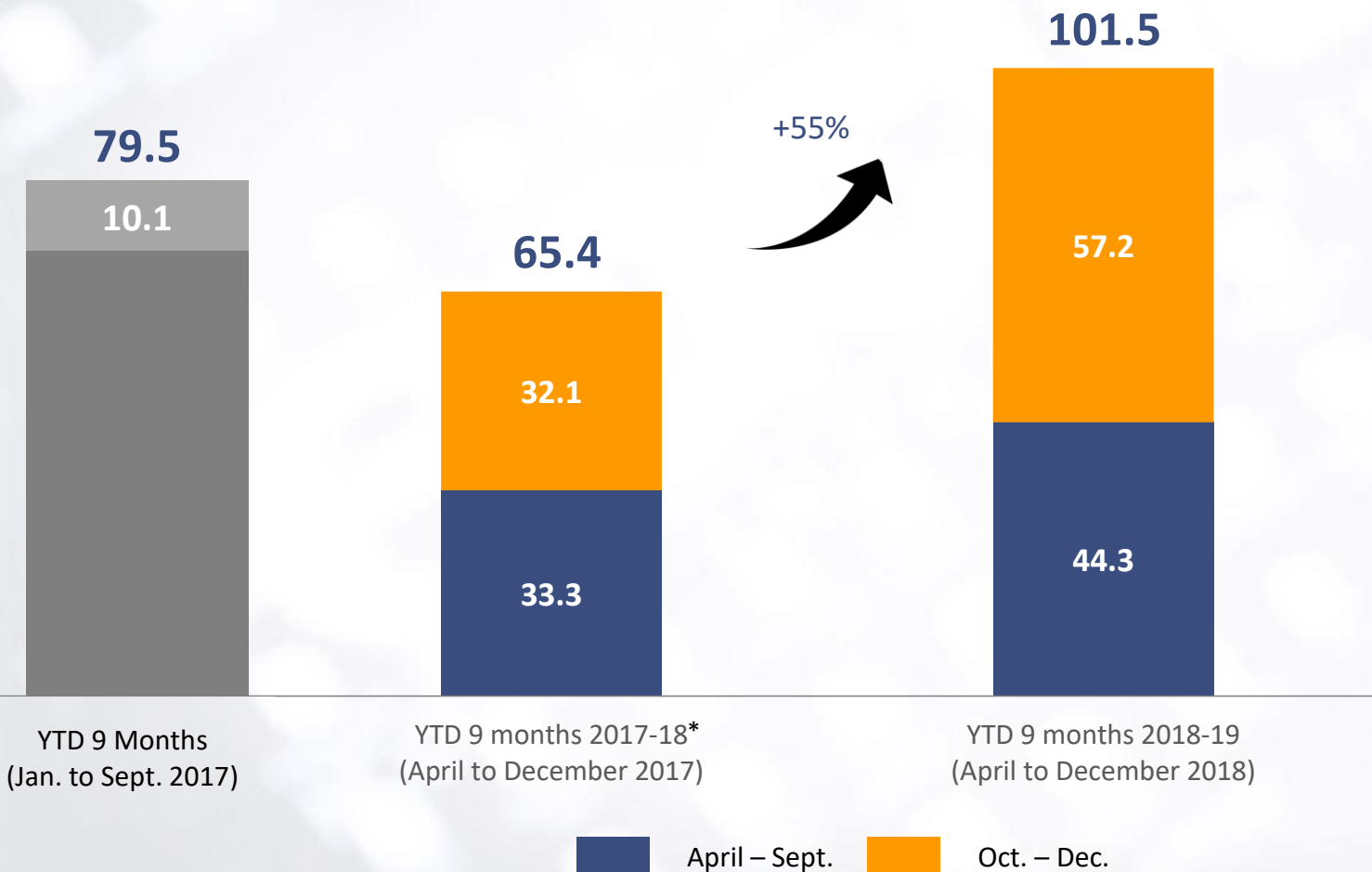
★★★★★ 80/100 GAMESKINNY	★★★★★ 8.1/10 VANDAL	★★★★★ 9/10 CULTURED VULTURES	★★★★★ 81/100 GAMESTAR
★★★★★ 81/100 GAME SPACE	INSURGENCY SANDSTORM		★★★★★ 16/20 JEUXACTU
★★★★★ 83/100 4PLAYERS.DE			★★★★★ 9/10 SHACKNEWS
★★★★★ 8.2/10 JUST PUSH START	★★★★★ 8.8/10 IGN	★★★★★ 8/10 MULTIPLAYER.IT	★★★★★ 16/20 JEUXVIDEO

RELEASED: DECEMBER 2018 ON PC

BEST SELLER: #1 ON STEAM AT RELEASE

RECORD: BEST PREORDER NUMBER FOR
A FOCUS TITLE ON STEAM

Q3 2018/2019 CONTINUED SUCCESS | EXCEEDING €100M SALES !



AT END Q3
2018/2019
REVENUE IN EXCESS
OF €100 MILLION

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BEYOND 2019
CONTINUED SUCCESS

BATTLEFLEET GOTHIC ARMADA

DEVELOPED BY TINDALOS
RELEASE JAN.24 ON PC





BATTLEFLEET
GOTHIC
ARMADA





WORLD Z

DEVELOPED BY SABER

PS4 XBOX ONE



7 WORLD WAR



A PLAGUE TALE

— INNOCENCE —

DEVELOPED BY ASOBO

  XBOX ONE **PC**



A PLAGUE TALE

— INNOCENCE —



THE SURGE 2

DEVELOPED BY DECK13

 PS4  XBOX ONE  PC





THE SURGE 2

GREED FALL

DEVELOPED BY SPIDERS

PS4 XBOX ONE PC



GREED FALL



MUD★RUNNER 2

DEVELOPED BY SABER

PS4 XBOX ONE PC





MUD★RUNNER 2



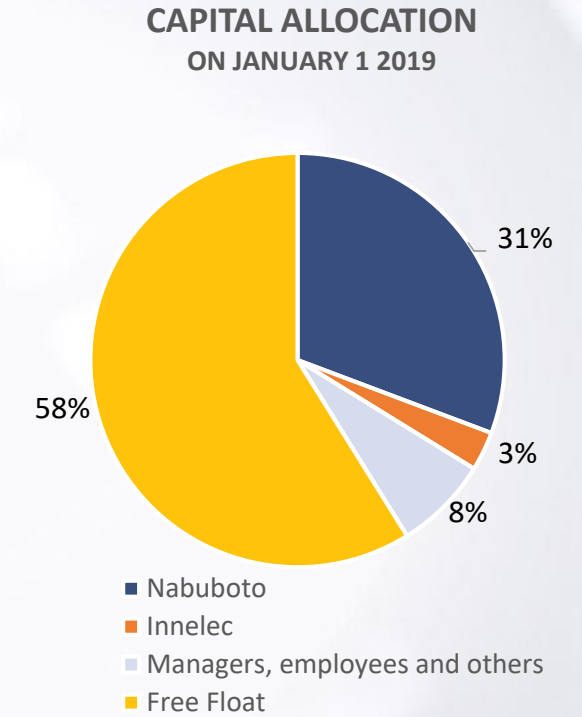
FY ENDING MARCH 2019

REVENUE IN EXCESS OF €110 MILLION

FY ENDING MARCH 2022

REVENUE IN EXCESS OF €130 - 150 MILLION

COMPANY | SHARE PRICE AND CAPITAL BREAKDOWN



Buy Back Program 2%
November 2018

UPCOMING EVENTS

WHAT'S NEXT FOCUS

April 10 – 11, 2019

Revenue Q4 2018/2019

April 25, 2019

Annual Results 2018/2019

June 27, 2019



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