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2Q/6M 2021 Results Presentation

3 August 2021

02 HIGHLIGHTS | FINANCIALS ⁽¹⁾

In millions of €	30/06/2020	30/06/2021	Δ
Customer Base Value	31.0	40.0	29%

In millions of €	6M 2020	6M 2021	Δ
Gross revenue	47.2	63.2	34%
Marketing spend	-16.3	-21.0	29%
CLIQ Factor	1.64x	1.59x	

2Q 2020	2Q 2021	Δ
26.9	33.1	23%
-8.5	-11.9	39%
1.67x	1.62x	

6M 2021:

- Customer Base Value up 29% to €40m (PY: €31.0m)
- Total Group sales increased by 34% to €63.2 million
- European gross revenue up 11% Y/Y
- Share of credit card billing in total revenue is 67% (PY: 51%)
- 75% of marketing spend via direct media buying (PY: 46%)
- 1.59x CLIQ Factor (cf. 1.64x in 6M 2020)

2Q 2021:

- Total Group sales increased by 23% to €33.1 million
- European sales up 11% Y/Y

03 HIGHLIGHTS | FINANCIALS ⁽²⁾

In millions of €	6M 2020	6M 2021	Δ	2Q 2020	2Q 2021	Δ
Gross revenue	47.2	63.2	34%	26.9	33.1	23%
EBITDA	6.3	11.6	83%	4.1	6.3	52%
EBITDA margin	13%	18%		15%	19%	
EBIT	6.0	11.1	87%	3.9	6.0	53%
Net result	4.4	7.6	74%	2.8	4.1	44%
• allocable to minorities	1.4	0.2	-87%	0.9	0.0	-97%
• allocable to shareholders	3.0	7.4	144%	1.9	4.1	113%
Basic EPS (in €)	0.49	1.14	132%	0.31	0.63	103%
Fully diluted EPS (in €)	0.47	1.12	138%	0.30	0.62	107%

6M 2021:

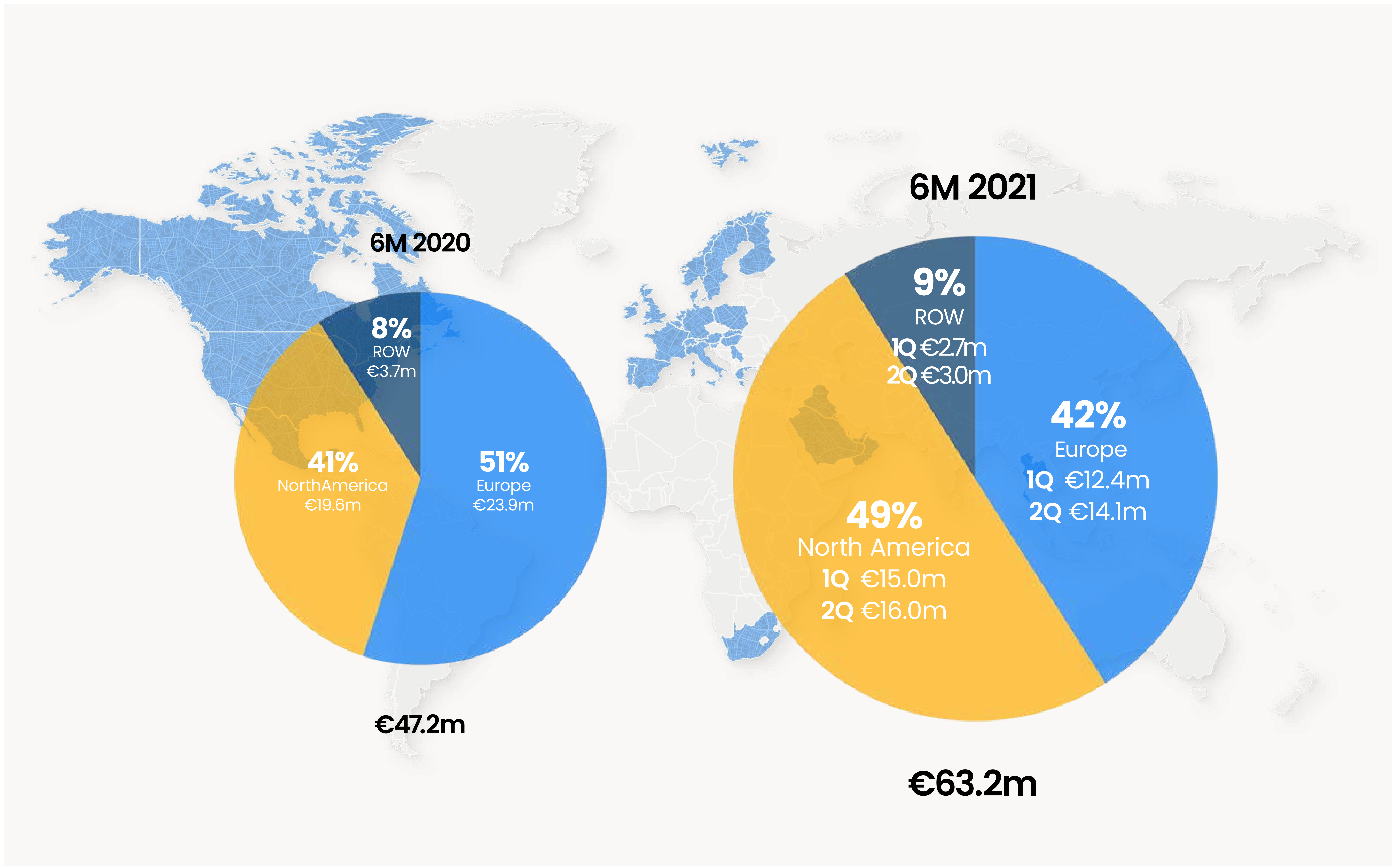
- 18% EBITDA margin (PY: 13%)
- EPS significantly boosted by acquisition of minority shareholdings

2Q 2021:

- 19% EBITDA margin (PY: 15%)
- €0.62 EPS (PY: €0.30)

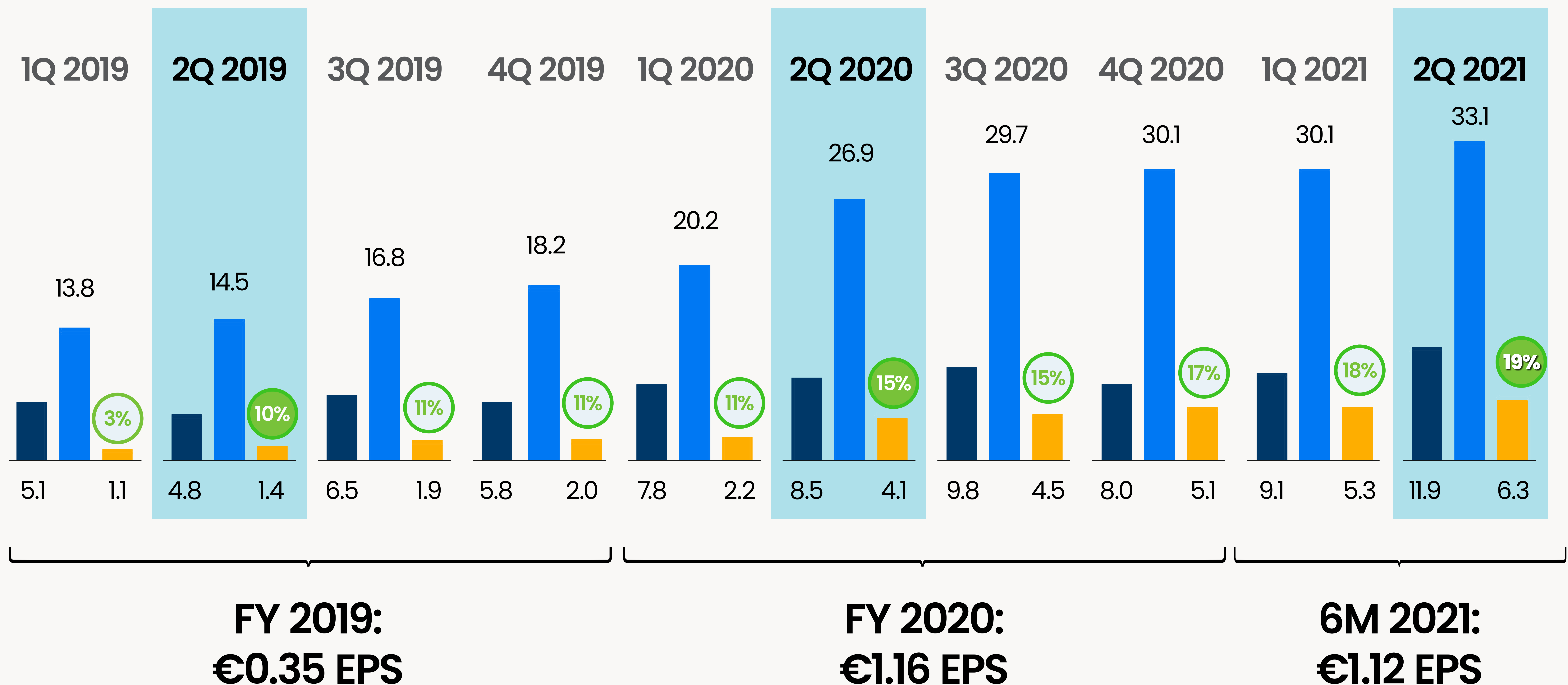
2021 outlook confirmed (≥€140m sales, ~€22m EBITDA, ~€46m marketing spend, ~1.60x CLIQ Factor):
Further growth expected in H2 2021

04 GROSS REVENUE | REGIONAL SPLIT



In millions of €

Marketing spend ■
Gross revenue ■
EBITDA ■
EBITDA margin %



EPS fully diluted

06 BALANCE SHEET & CASH FLOW

ASSETS			EQUITY & LIABILITIES		
In millions of €	31/12/2020	30/06/2021		31/12/2020	30/06/2021
(In)tangible fixed assets	50.8	50.8	Equity	55.6	53.7
Other non-current assets	4.4	3.7	Non-current liabilities	4.7	6.9
Trade receivables	9.1	14.2	Bank borrowings	3.8	4.9
Other current assets	7.7	10.6	Trade payables	2.0	3.6
Cash and cash equivalents	4.9	3.3	Other current liabilities	10.9	13.7
Total assets	77.0	82.7	Total equity & liabilities	77.0	82.7

In millions of €	6M 2020	6M 2021
Cash flow from operating activities	5.7	7.1
Cash flow from investment activities	-0.1	-0.3
Operating free cash flow	5.6	6.8
Cash flow from financing activities	-1.3	-9.5
Total cash flow (prev. defined as „Free cash flow“)	4.3	-2.7

Cash outflow from financing activities included:

- €6m for the acquisition of minority shareholdings
- €3.3m dividend distribution



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9 Feb	FY 2020 Preliminary Figures
17 March	FY 2020 Annual Report
29 April	Annual General Meeting
6 May	1Q 2021 Financial Statement
3 Aug	2Q/6M 2021 Financial Statement
2 Nov	3Q/9M 2021 Financial Statement

7 Jan	ODDO BHF Forum
24 March	Metzler MicroCap Days
14-15 April	CF&B SmallCap Event
20 April	Pareto Securities' TechITService conference
29 April	Annual General Meeting
4 May	MKK Münchner Kapitalmarkt Konferenz
17-18 May	German Spring Conference
19 May	CF&B Tech Sector Day
27 May	Goldman Sachs Small Wonders Conference
2-3 June	ODDO BHF NextCap Forum
9 June	PLATOW EURO FINANCE Small Cap Konferenz
10 June	Quirin Champions-Konferenz
24-25 June	CF&B Spring European MidCap Event
25 Aug	Montega HIT Hamburger Investorentag
6-7 Sep	German Fall Conference
18 Sep	Heidelberg Event
20 Sept	CF&B European MidCap Event
24 Sept	Baader Small-Cap Day
27-28 Sept	Investor Access Event
20-22 Oct	Berenberg / Goldman Sachs GCC
21-22 Oct	European Large & MidCap Event
18 Nov	CF&B MidCap Event
22-24 Nov	Deutsches Eigenkapitalforum
1-2 Dec	CF&B MidCap Event



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APPENDIX

Kids' Content



- Addition of high-quality children's streaming content to attract a new, younger target audience and family viewing
- c.70 hours of high-quality series and films for children in Germany, Austria and Switzerland
- well-known series and characters, such as Fix&Foxi, Fairly Odd Parents (Cosmo and Wanda), Tales from the Crypt (Geschichten aus der Gruft) and Country Mouse and City Mouse (Landmaus Stadtmaus)

Live Italian Serie B football



- Exclusive audiovisual rights to 3 seasons (2021/2022, 2022/2023 and 2023/2024) of the Serie B football championship
- broadcasting the top matches per round in full, HD and live, on a delayed basis or on an unlimited repeat basis, as well as highlights in the DACH region.

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