



Media Seminar June 2021

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I. Introduction to MGI & Verve

II. Starting the Media segment Verve

III. Basics of media industry

IV. MGI Media segment overview

V. Industry Overview & Positioning

VI. Growth opportunities

VII. Organic growth

VIII. Demo

IX. Case studies

X. Conclusion

XI. Q&A



Today's Presenters and Ownership Structure

Shares listed on Frankfurt Stock Exchange and Nasdaq First North Premier Stockholm



Remco Westermann

CEO & Chairman of the Board since 2012

- Manager, entrepreneur and investors with more than 25 years of experience from various leadership positions
- Founding, reorganising and growing various companies in the new technologies and media sector



Paul Echt

CFO since 2018

- Finance manager with more than 10 years of experience from the tech and finance industry
- Previously positions at UniCredit Bank in Berlin, Munich and New York as well as Shopgate Inc. in San Francisco



Ionut Ciobotaru

CPO of Verve Group

- + 15 years of experience in the ad tech industry
- Founder of PubNative, founder of web development company Weebo and previous positions at Applift and EA

Shareholdings (149,679,980 shares¹⁾²

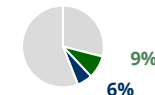
Remco Westermann



Remco Westermann holds his MGI shares via the German holding company Bodhivas GmbH. Bodhivas GmbH is based in Düsseldorf where Remco Westermann resides and holds the shares of Remco Westermann as well as voting rights of early gamigo Investors.



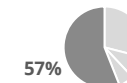
OAKTREE



Oaktree Capital Management, LP is a USD 140bn diversified global asset manager. Oaktree has supported many European management teams growing their platform companies into recognized market leaders including the creation and development of multi-billion listed companies.

Janus Henderson Investors is a global asset manager with EUR 340bn assets under management who take an active investment approach in the most compelling opportunities in the market and is also active in some of MGIs peers.

Free float



The free float is composed of retail and institutional investors who bought the shares on the secondary market, as well as institutional investors from the EUR 8 million capital increase in July 2019, the EUR 29 million share issue in September 2020, and the 21 million share issue in May 2021, including Skandia Fonder, Atlant Fonder, BMO Global Asset Management, Didner & Gerge Fonder and Knutsson Holdings.

Source: Group information

Note: 1) Number of shares after directed share issue in May 2021 (2) To hire top key employees as well as retaining employees the board has decided to launch an ESOP program and to allow for the issuance of up to 15 million new MGI shares, earliest from May 2024 and latest till December 2030 via an option at a strike price of minimal Euro 2.60 per share.

Introduction to Media and Games Invest

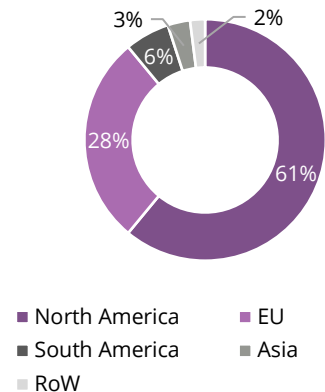
A leading European games and digital media powerhouse serving customers worldwide

Key facts

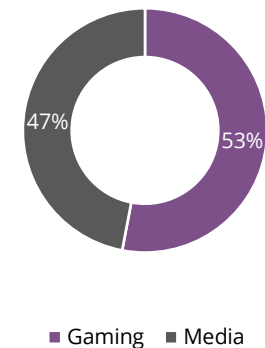
- +30 M&A** Transaction since 2012
- EUR ~650m** Market cap
- Listed** on Frankfurt Stock Exchange and First North Premier Stockholm
- +800** Employees
- +10** Top MMOs¹
+5,000 Casual games
- +100m** Registered gamers
- +111bn** ads delivered yearly
- +5,000** Advertisers

Key revenue splits

Revenues by region (Q1'21)

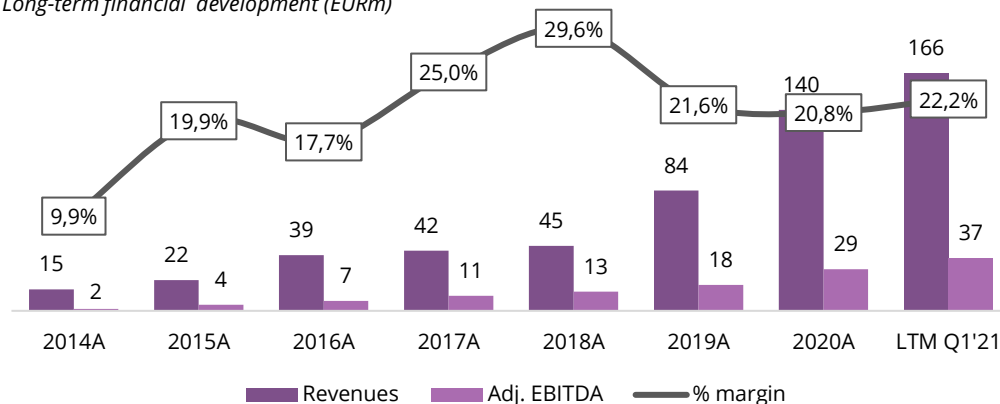


Revenues by segment (Q1'21)



Key financial development²

Long-term financial development (EURm)



Source: Group information

Notes: 1) Massively Multiplayer Online games, 2) Reported figures; KingsIsle only consolidated for Q1'21; PF adj. EBITDA for the full LTM amounting to EUR 59.3m

MGI's two segments

Q1 2021 financials at a glance

Games: Development and publishing

EUR 27.4m

Revenue

97%

YoY growth

EUR 10.9m

Adj. EBITDA

40%

Adj. EBITDA margin

Revenue steams

In-game purchases

Game subscriptions

Advertisement revenues



Brand



Media: User acquisition technology infrastructure

EUR 24.5m

Revenue

94%

YoY growth

EUR 2.6m

Adj. EBITDA

11%

Adj. EBITDA margin

Revenue steams

SaaS fees

Agency fees

Ad commission



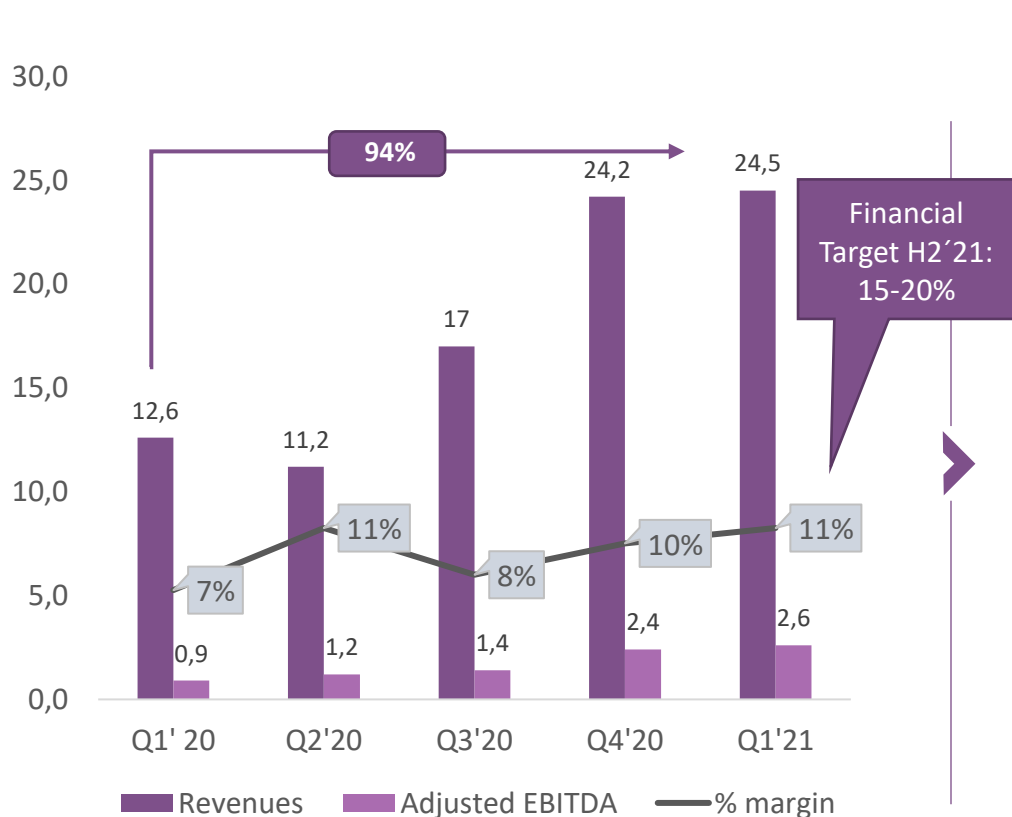
Brand



Quarterly performance Media segment


Strong organic growth combined with M&A

Media Segment



94%
YoY revenue
growth Q1'21

Key performance drivers:

-  Strong organic growth from mobile gaming advertising partnerships
-  Leveraging strong synergy potentials between our games and media segment
-  Successful integration of all media activities under Verve Group and continuously improving internal operations efficiency

Owned ad-tech platform enabling efficient user acquisition

Connecting Games brands, advertisers and publishers to users in real time

Key facts



Marketplace: Active in 20 countries



Platforms: Full stack and self service



Product: Strong portfolio including performance-, influencer-, social media- and mobile app marketing as well as software as a service (SaaS) solutions



Publishers: +4,000 publisher integrations

92%

Retention rate of > USD 100k SaaS accounts

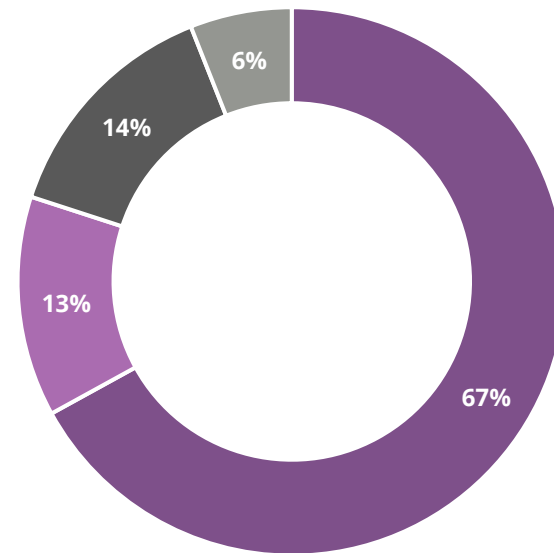
37%

Increase in SaaS accounts in Q1 2021 YoY

+111bn

Impressions from SaaS advertising in LTM Q1'21

Diversified, attractive revenue streams¹



- Supply Side Platform
- Demand Side Platform
- Performance Platform
- Influencer Platform

Source: Group information
Notes: 1) Q1'21

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History of building the Media segment Verve

From influencers towards data driven programmatic marketing

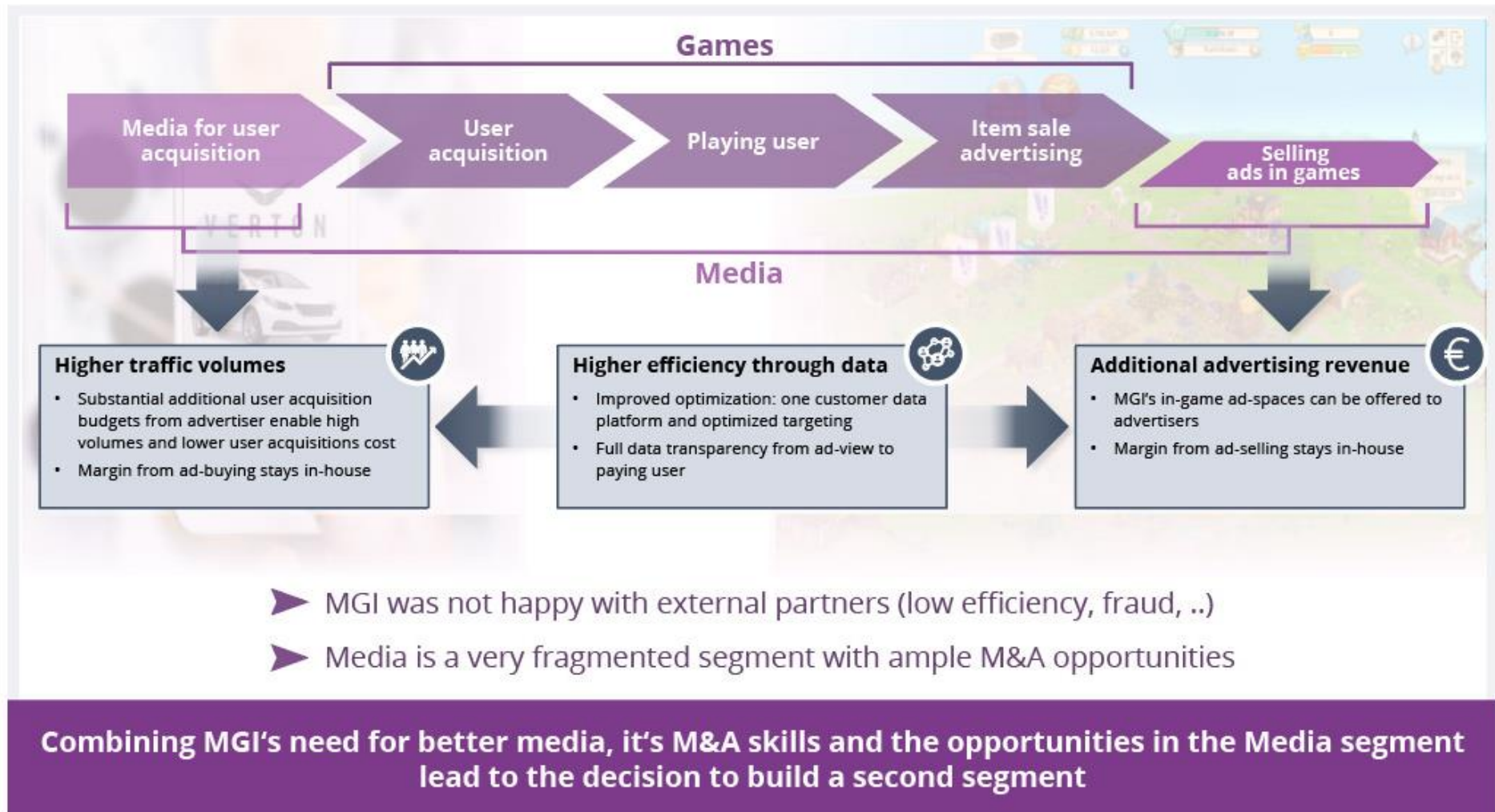
Our starting point: Building a strong Media group to support MGI's gaming segment gamigo as well as any other game company; on the user acquisition side as well as on the monetization side



Current: One of the worldwide leading programmatic media SaaS platforms, USP with full vertical tech-stack, fast growing and profitable working for gamigo as well as for third-party clients!

Media is a logical extension of the Gaming value chain

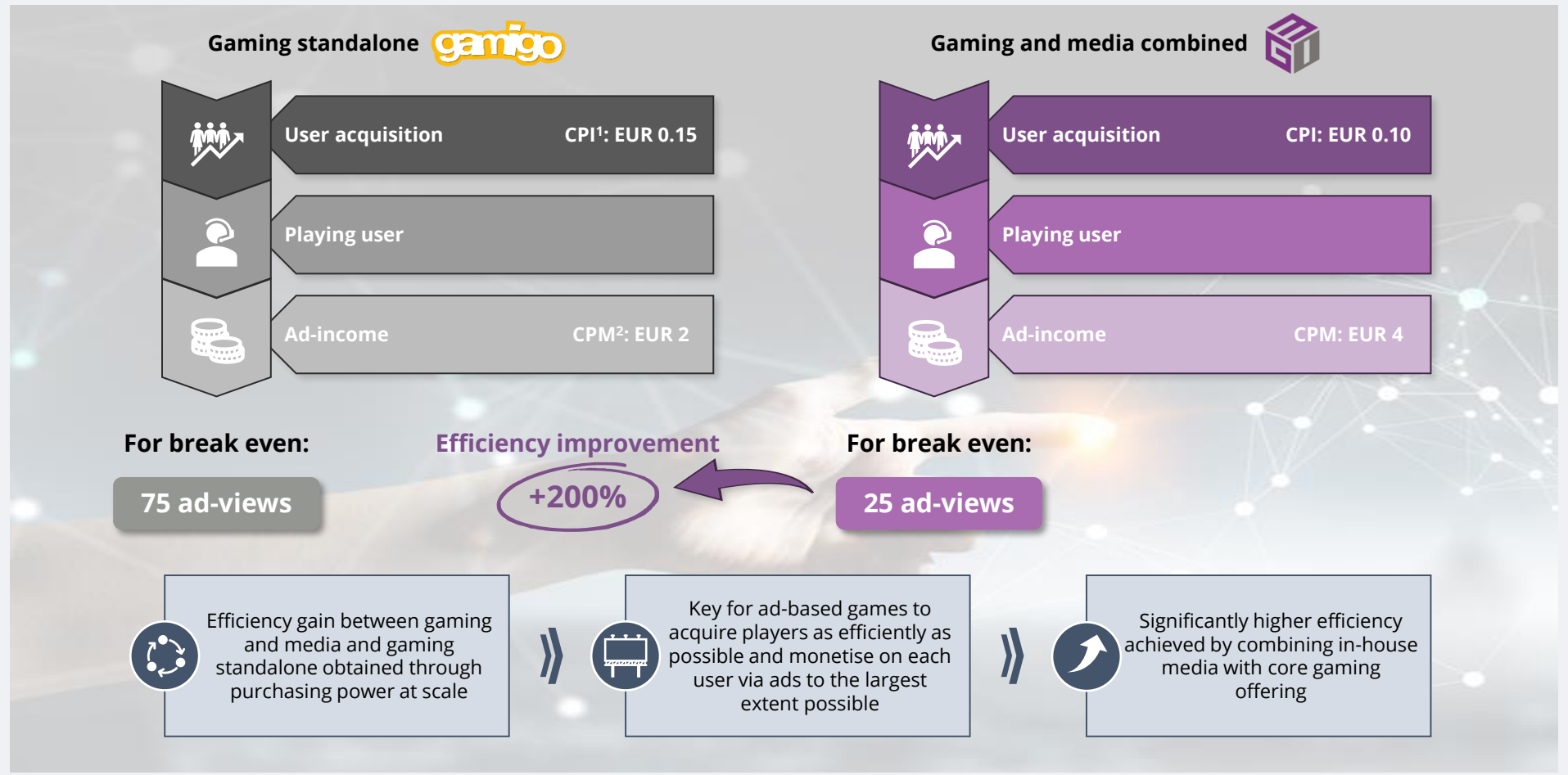
Online media serves as a strong organic growth accelerator for games



Why we combine Media and Games in a nutshell: #1

Combined Media & Gaming is much more efficient than stand-alone Gaming: clear cost / revenue advantage

Games and media combined: optimising the value chain, simplified example of the cost and revenue synergies

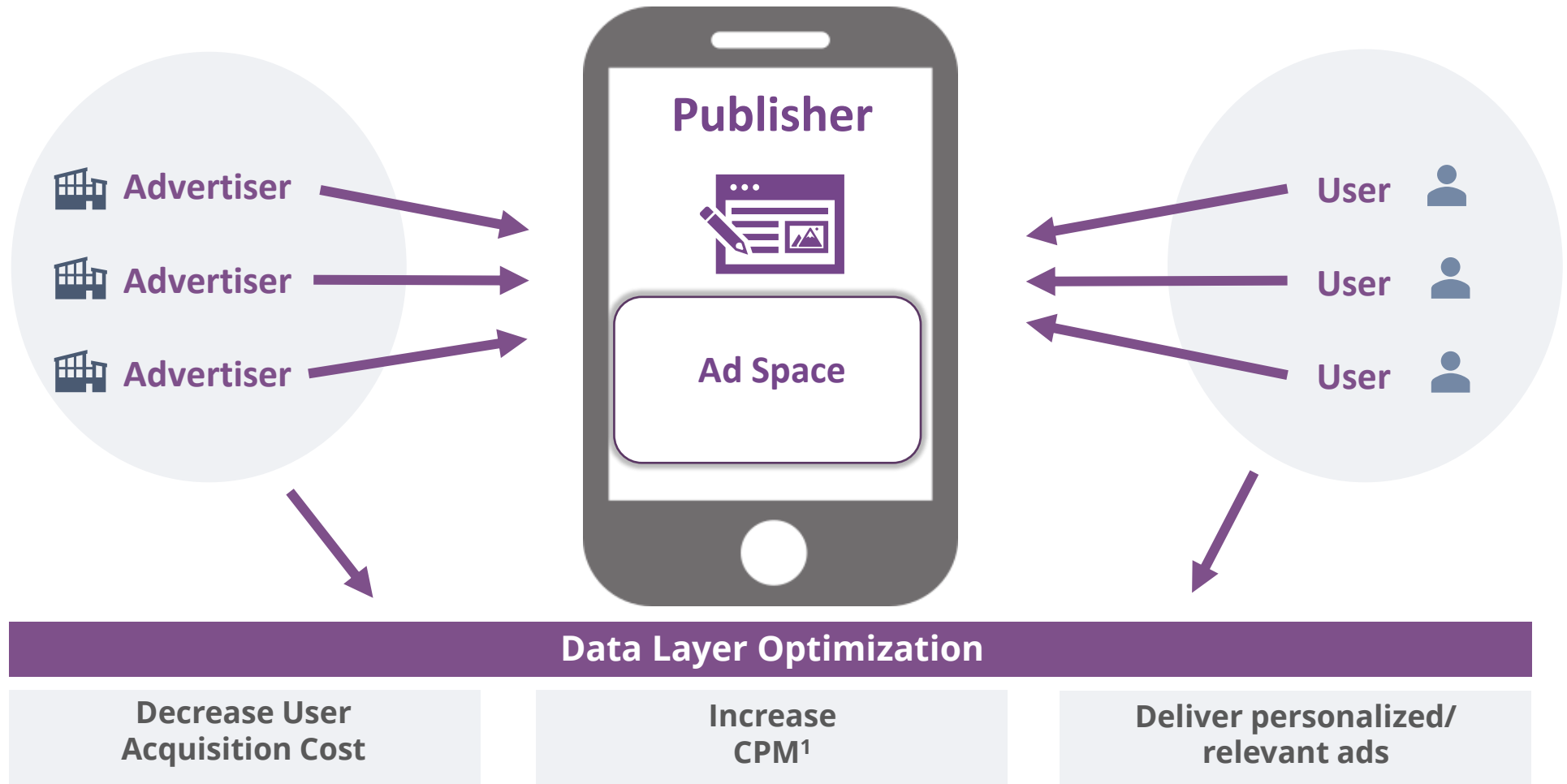


Source: Group information
Notes: 1) CPI = Cost Per Install, 2) CPM = Cost Per Thousand Impression

Why we combine Media and Games in a nutshell: #2



Combined Media & Gaming is much more efficient than stand-alone Gaming: clear data / targeting advantage

Games and media combined: optimising the value chain, simplified example of better targeting



Notes: 1) CPM: Cost per Mille (Thousand Impression)

M&A Overview

Platform		In-App	Mobile Web/ Web	CTV/ OTT	DOOH
Vertical Integration	Creative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Managed Brand	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Managed Performance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	DSP (Self Serve, Enterprise)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	DMP		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Open Exchange/Network	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	SSP + HB	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
	PMP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Analytics, Measurement & Attribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Audiences OX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1st party data (own SDK)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Atom (probilistic ID)	Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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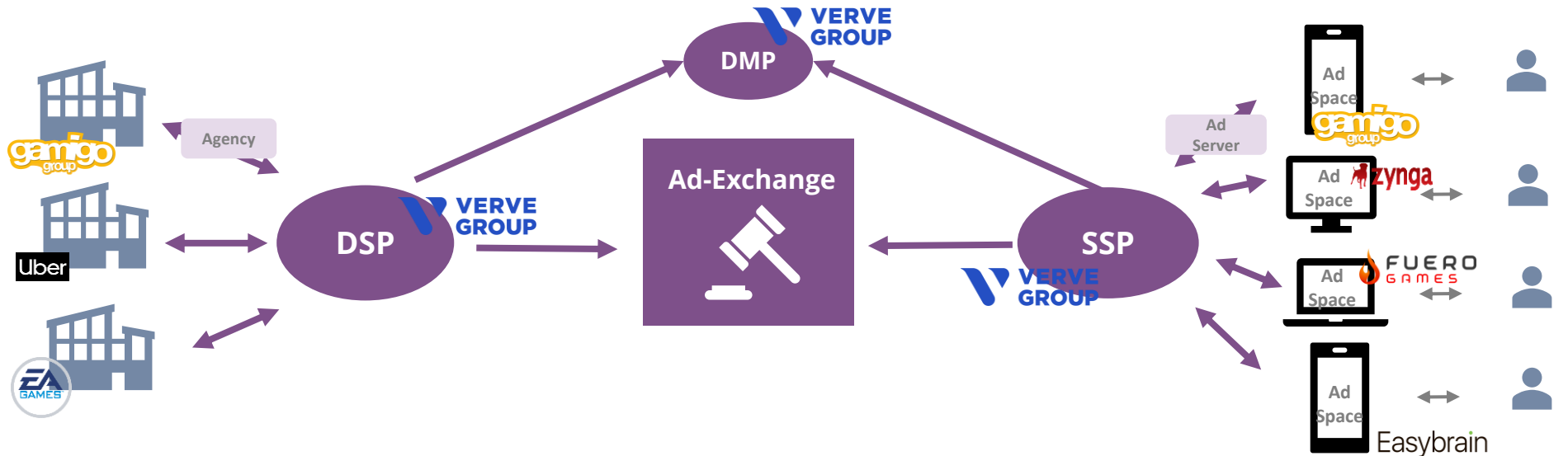


Source: Circus Street, <https://www.youtube.com/watch?v=b0VNWo-e38Y&t=20s>

Programmatic advertising

Buying and selling of ad inventories via Real Time Bidding in 200 milliseconds

Advertisers



DMP: A Data Management Platform is a technology platform that collects and manages data to generate audience segments used to target specific sets of users in online advertising campaigns.

DSP: Enables advertisers to track metrics and set the buying parameters for their campaigns. Uses algorithms to determine the 'value' of the user based on the target audience, before placing a bid in the auction.

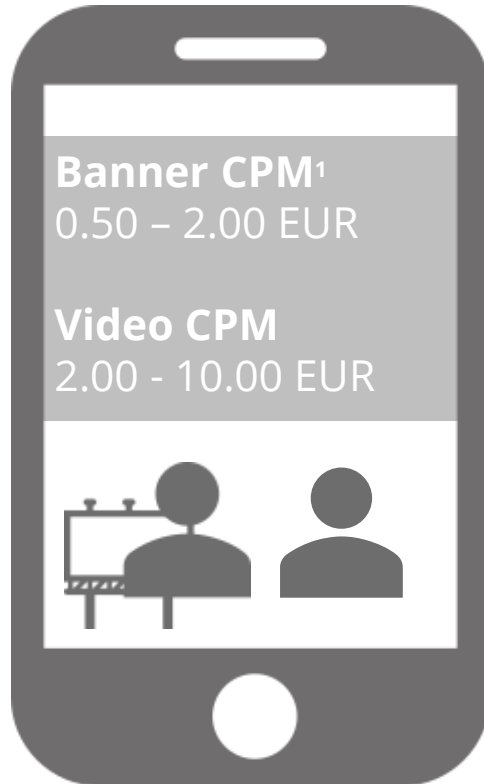
An **ad exchange** is a technology platform that facilitates the buying and selling of media advertising inventory. Prices for the inventory are determined through real-time bidding.

SSP: Collects ad space from many different publishers and analyses the associated anonymized user information to give advertisers the best possible audience intelligence and reach

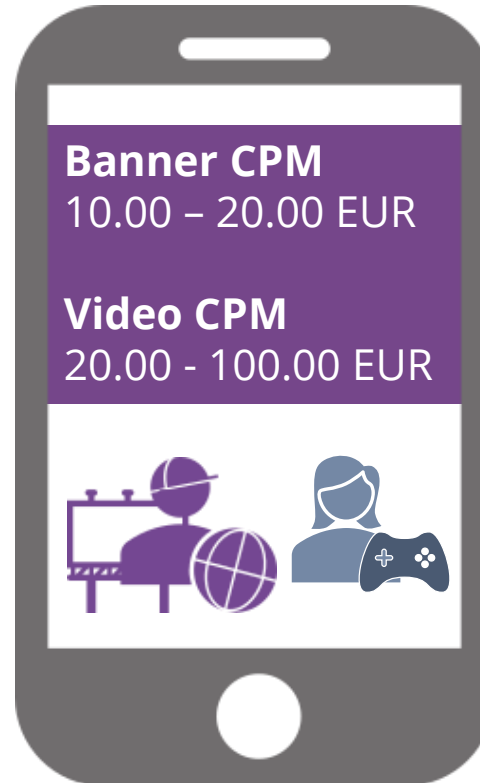
Non targeted vs. targeted advertising

Optimising the value chain, simplified example of better targeting

Non targeted advertising



Targeted advertising



Better results for advertisers

Advertisers

Looking at ROAS rather than CPM -> better targeting leads to less ads bought but at higher prices and with better returns

Better results for publishers

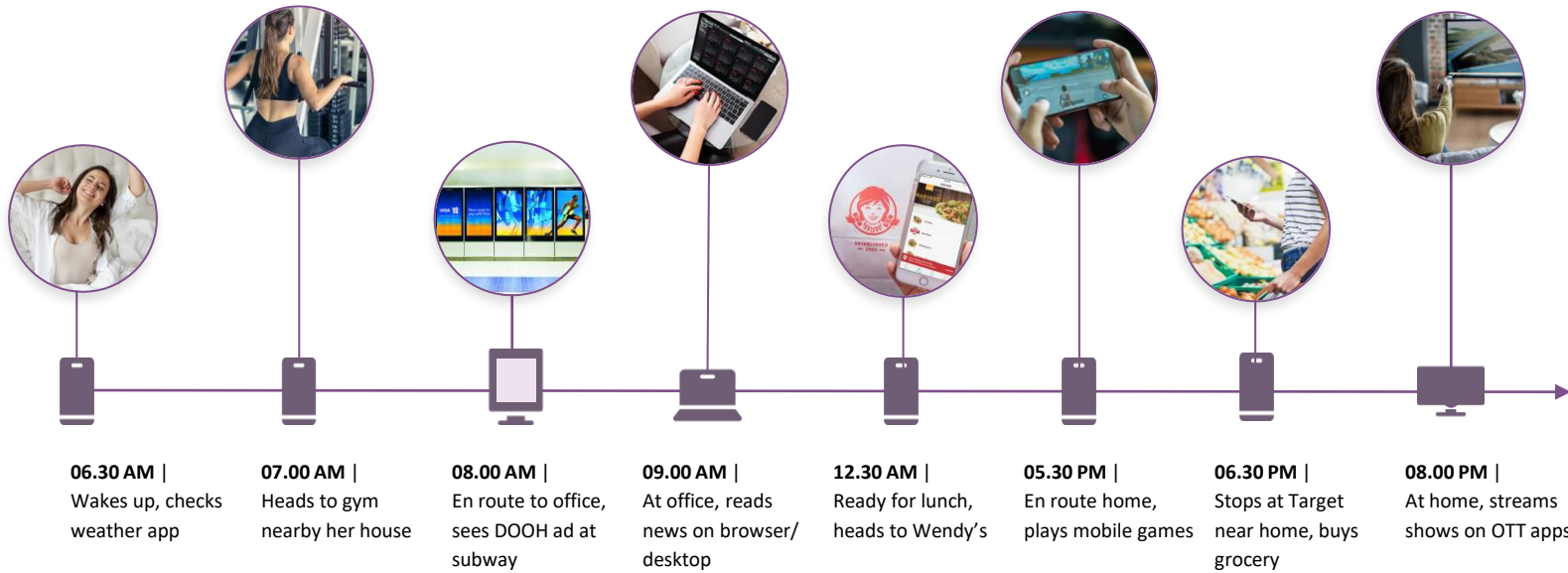
Publishers

Looking at increasing yield with each advertiser being able to better reach their audiences and thus paying a premium. The amount of ads is the same, but the value of each ad is higher

Data Layer

Notes: 1) CPM: Cost per Mille (Thousand Impression)

The mobile phone and it's user are key to data



Audience segment

Compiles Privacy-compliant Signals:

Content Context + Location Context + Ad Interaction + Device ID (where authenticated)



Insights for Audience Profiles

Lifestyle | Preferences | Transactions | Hobbies | Life stage

A world without identifier and cookies

Creation of target group profiles for efficient user targeting

Pre IDFA change



Audiences with ID

Device ID-Based



Without ID, reach is expected to shrink
to ~ **< 50 %**

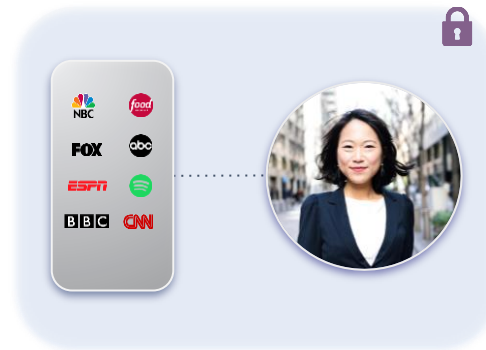
2021 & BEYOND



Audiences without ID

Contextual

Cohorts



Does not require ID, Ensures targeting
with reach of : **100 %**



Does not require ID, Ensures targeting
with reach of : **~70 %**



Mobile



Desktop/Laptop



Connected TV



DOOH

Ad Formats

Choose from the full range of standard ad formats...



Banner

Interstitial

Native

In Stream/Out Stream

Rewarded

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Verve Group at a glance

Connecting advertisers and publishers to people in real time



Experienced
Leadership

Focus on technology, data, and customer service

- Experienced global executive team
- 200+ employees globally
- 60+ engineers/ 50+ sales employees
- Proud members of:
 - IAB
 - MMA
 - Prebid



Industry
Excellence

High-quality, data-focused, first-in-class technology

- Direct brand demand: top Fortune 500 advertisers
- Direct performance demand: top 500 global digital brands
- Proprietary algorithms and optimization
- Publishers: 4,000+ direct integrations
- Owned and operated gaming supply



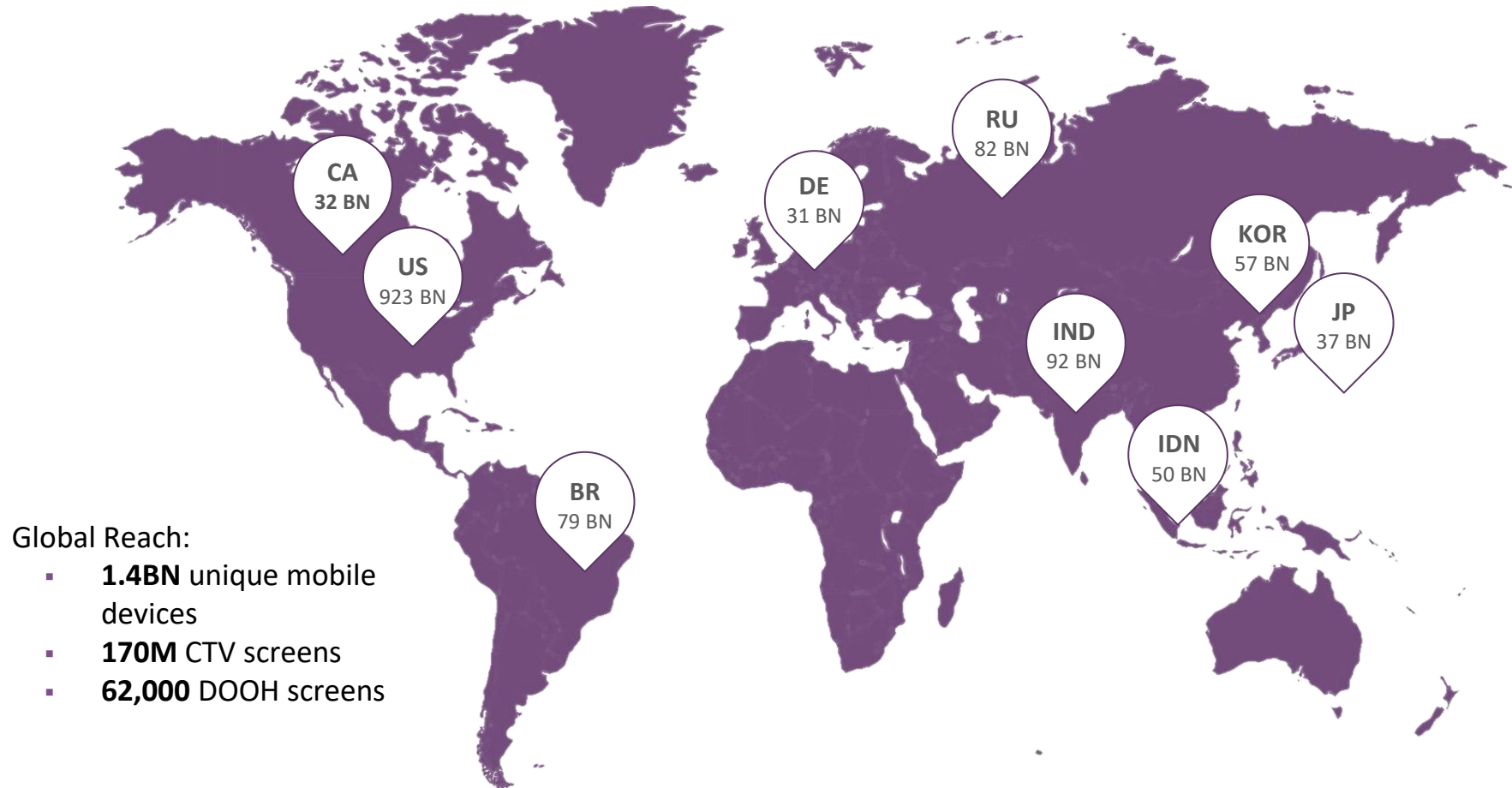
Global Omnichannel
Ad Platform

Complete end-to-end demand-to-supply stack

- Managed service ad platform
- Mobile RTB ad exchange/SSP, custom self-serve/SaaS DSP
- Open-source SDK for publishers and in-app bidding solution
- In-app, mobile web, and desktop, CTV, OTT and DOOH support

Reaching a global scale

Connecting brands and agencies to global audiences with billions of monthly ad requests on our platform



Global Reach:

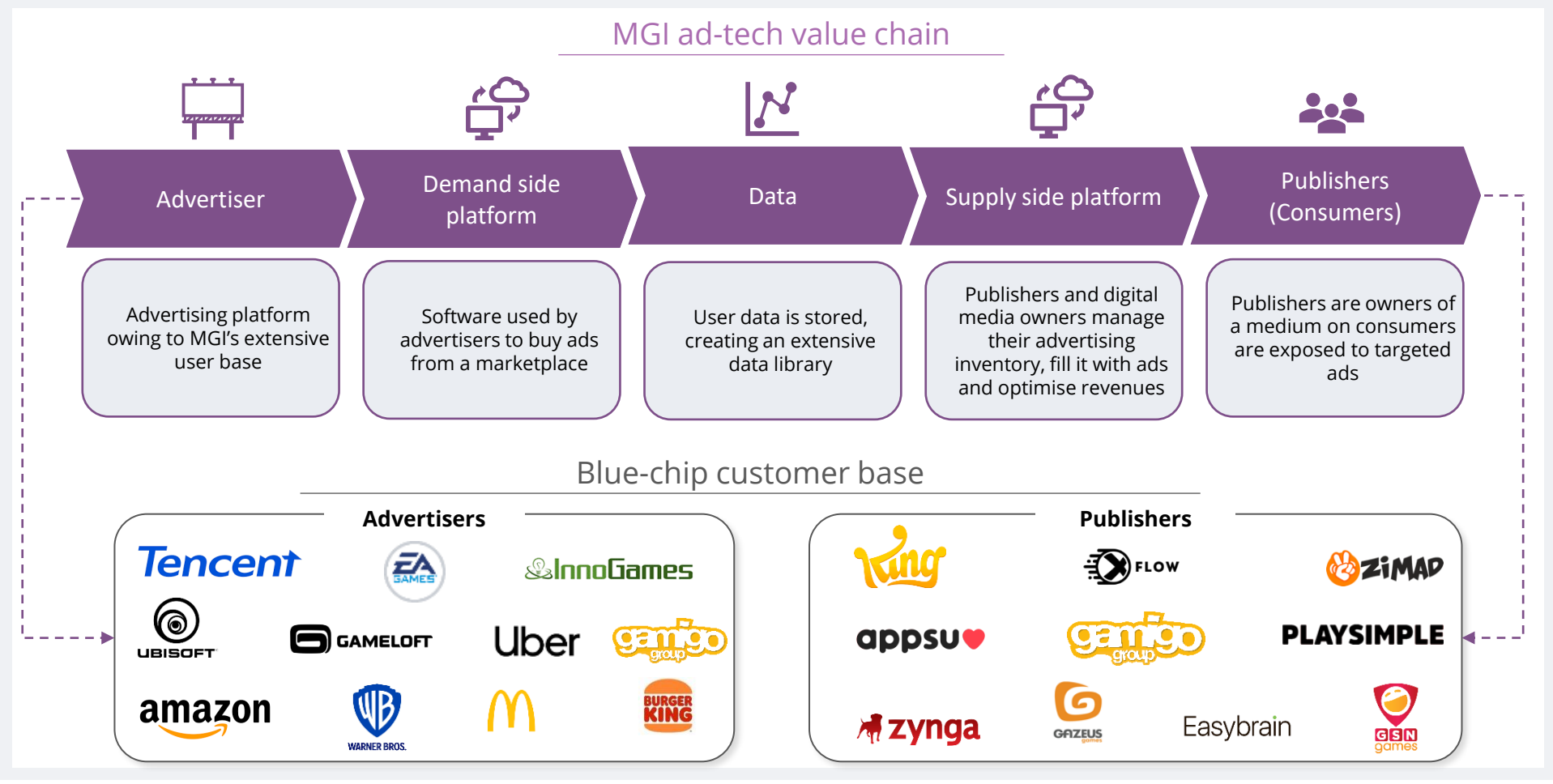
- **1.4BN** unique mobile devices
- **170M** CTV screens
- **62,000** DOOH screens

Source: Group information

Full stack transparent advertising technology infrastructure

Programmatic advertising platform encompassing the entire ad-tech value chain and driving user acquisition

Media segment highlights



Source: Group information

Differentiators



Magnite

theTradeDesk



PubMatic



Transparency/ Open Standards	✓	✓	✓		✓	
Open Source Projects	✓	✓	✓		✓	
DSP	✓		✓	✓		✓
DMP	✓			✓		✓
SSP	✓	✓		✓	✓	✓
Full Stack	✓			✓		✓
Mobile	✓		✓	✓		✓
Web	✓	✓	✓		✓	
CTV/ OTT	✓	✓	✓		✓	

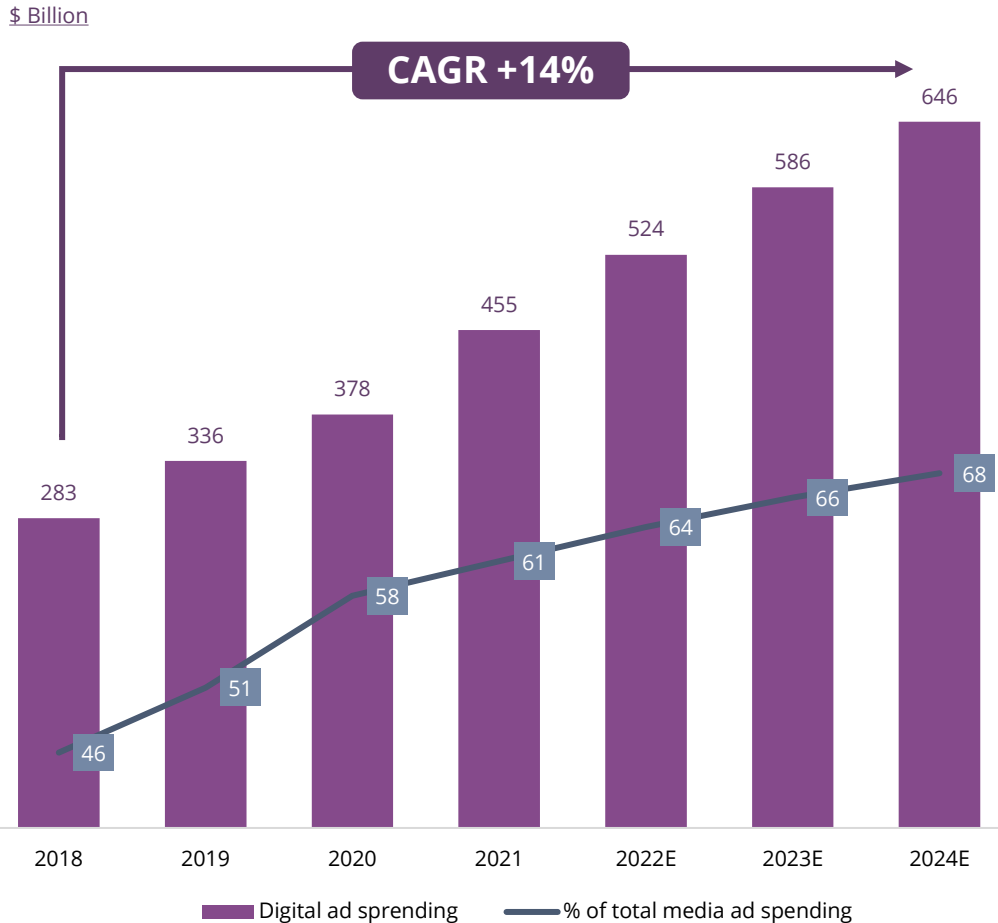
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Global Digital Ad Spending¹



Digital advertising **overtook classic advertising** by now and is expected to further increase its share in coming years.



Programmatic represents **more than two-thirds** of digital display ad spend² by now and is expected to increase its share even more.



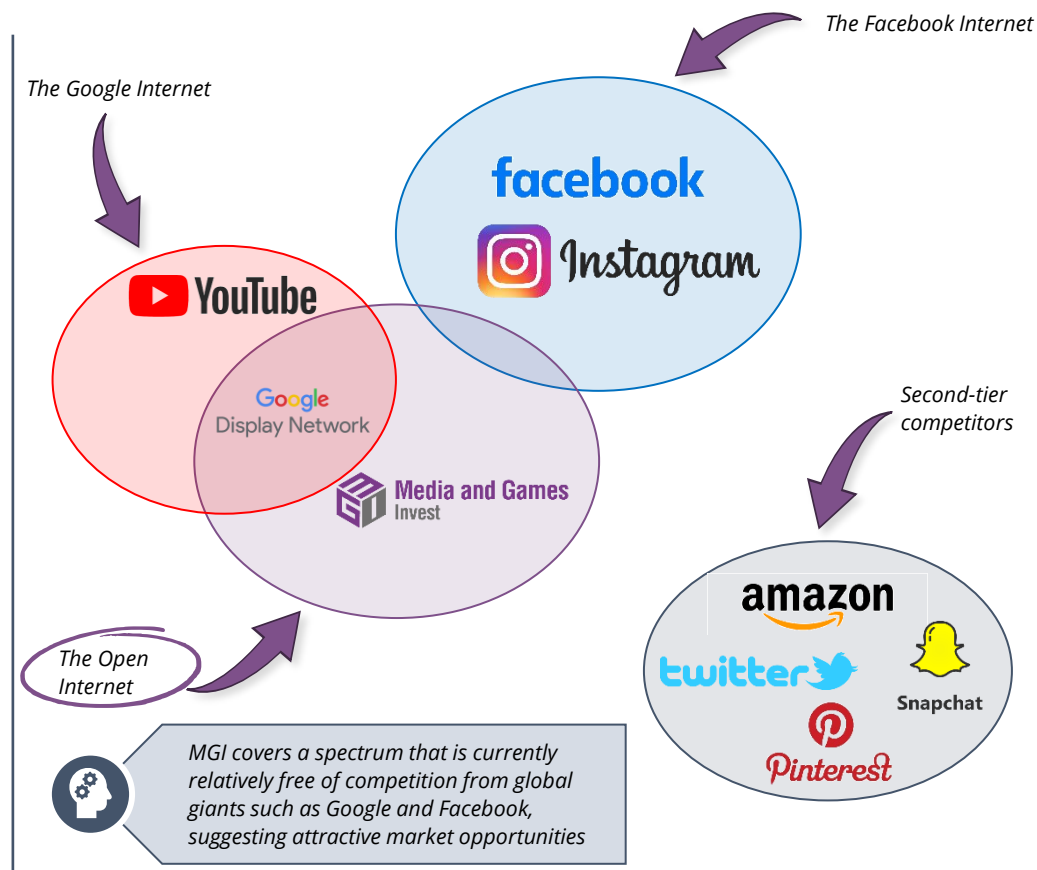
“Those who want to successfully attract users will no longer be able to avoid digital, programmatic advertising.”
Remco Westermann, CEO at MGI

Notes: 1) eMarketer, 2) Zenith (refers to display spend, incl. banners & video but excl. search, classifieds & directories)

Competitive landscape in the ad-tech industry

Consumers spend more than half their time outside of the wallet garden

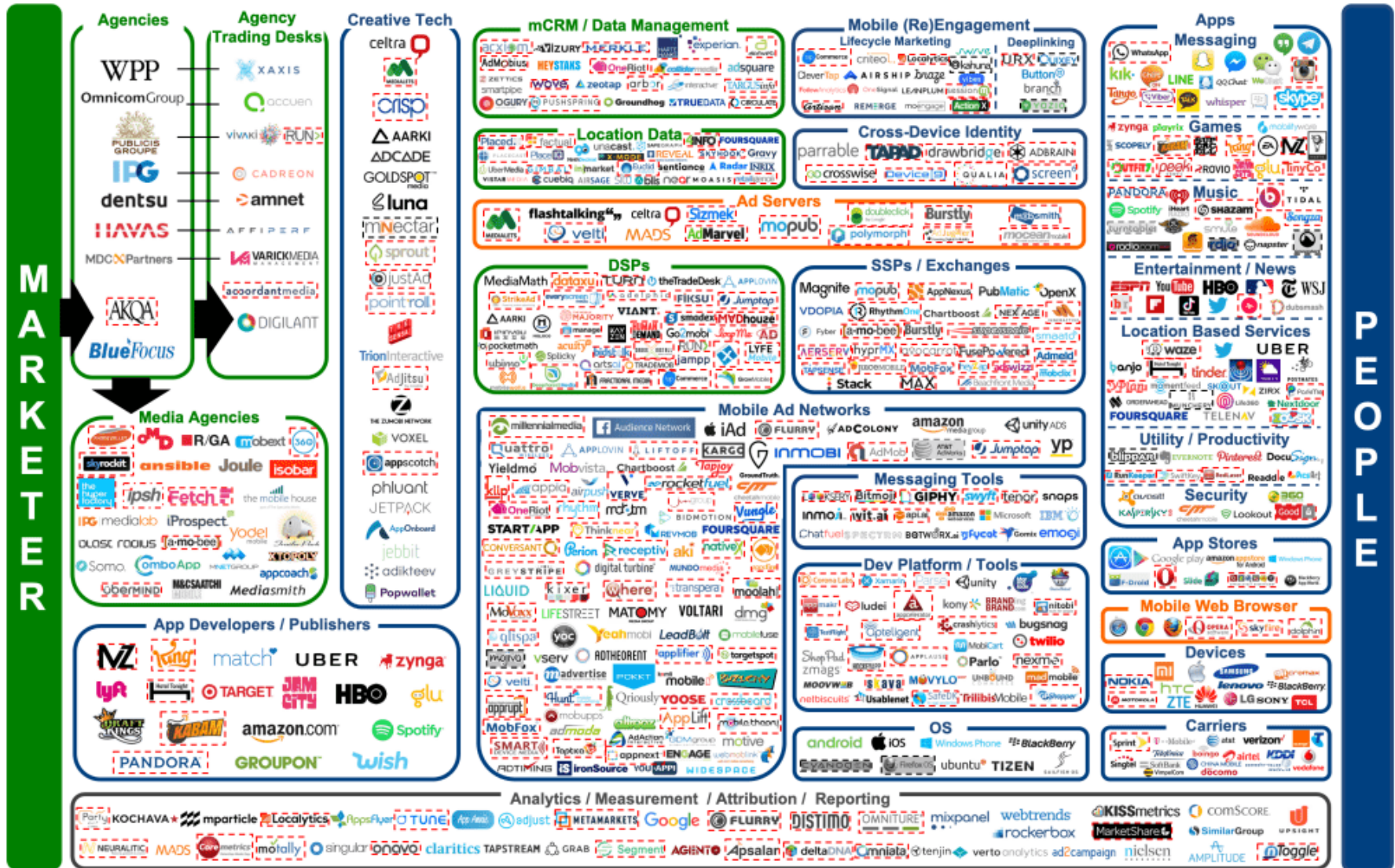
Paid media and the open internet landscape



Paid media and the open internet

- Google controls 28% of global digital ad spend
- Facebook controls 22% of global digital ad spend
- On the open internet (50% share), Google and Facebook also hold some share, but there is still a massive opportunity for independent players

Industry Overview: a fragmented consolidating market



Source: Mobile Lumascope: <https://lumapartners.com/content/lumascopes/mobile-lumascope/>

Trends in the market offering ample opportunities

Deprecation of privacy identifiers and consolidation



Deprecation of IDFA



- Since April 26, 2021 tracking of mobile user data is being made explicitly opt-in by Apple
- Change from a previously open environment to multiple 1st party 'walled gardens'
- Less effective advertising means Advertisers will need to pay higher user acquisition costs and publishers will have reduced revenues

Others will follow...



- Google will deprecate third-party cookies next year
- Similar changes are expected for GAID on the Android operating system



Consolidation



- Vertical consolidation across the value chain (e.g. Digital Turbine -> Fyber, Adcolony, Appreciate, Applovin -> Adjust, Vungle -> Treseña, AlgoLift, GameRefinery)



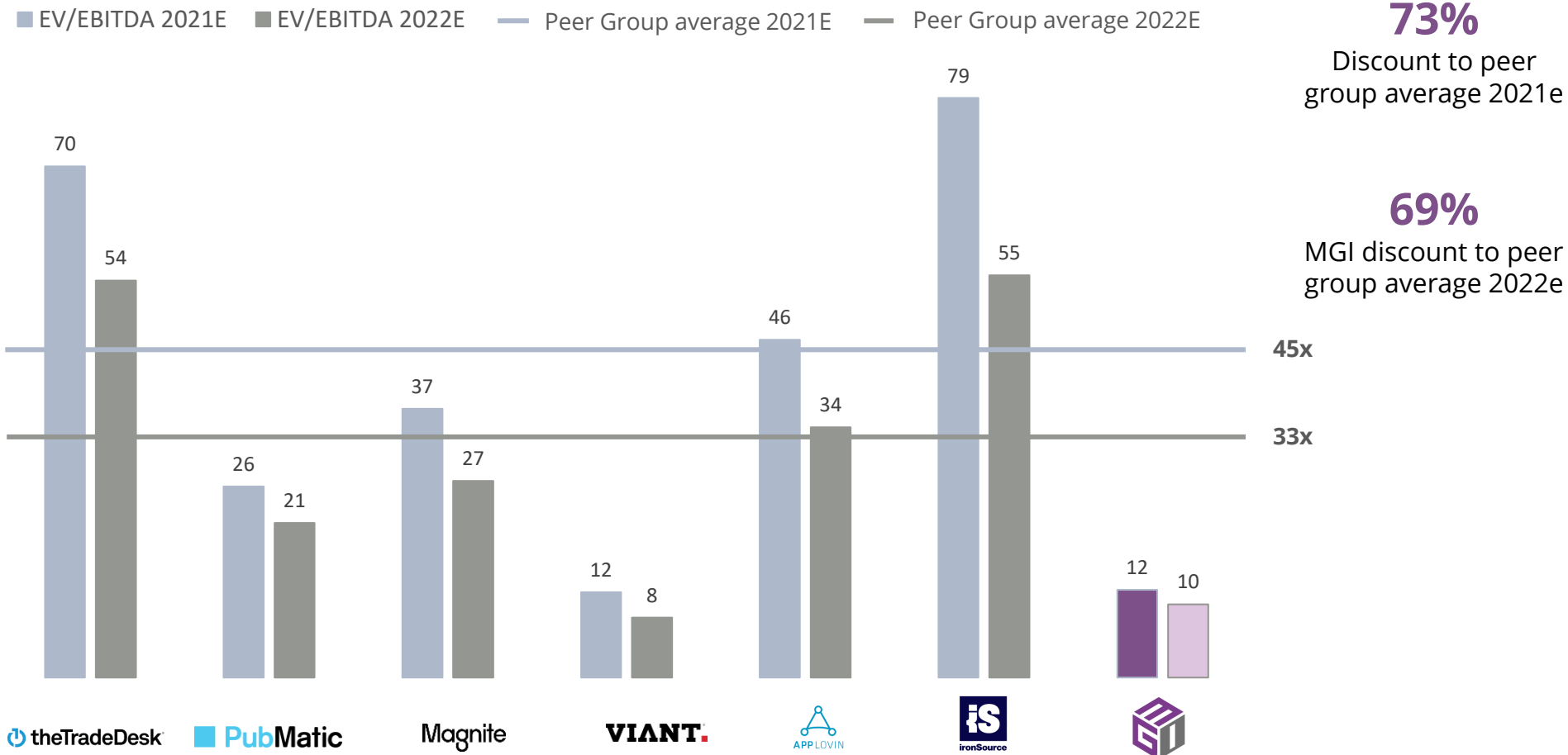
- Horizontal consolidation across channels (Magnite -> SpotX)
- Media + Gaming Consolidation (Zynga -> Chartboost, Skillz -> Aarki)

Adtech IPO activity increase



- Due to good results post Covid19, digital media sector resparked public markets investor interest
- Viant (DSP), Outbrain, Taboola, IronSource

Peer group analysis





Source: Data for TradDesk, PubMatic, Magnite, Viant, AppLovin and MGI from GBC Research Study(15.06.2021, available through mgi-se.com), Data for IronSource from JMP (Data available upon request)

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	PMP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Analytics, Measurement & Attribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Audiences OX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Target key facts



Digital Advertising Platform to monetize websites and apps via ad-placements



Cloud-based self serve SaaS Platform



Ad channels: Mobile apps, Web Sites and Connected TV



Global reach: 1.3bn unique users monthly



Global reach enables efficient user acquisition for games



Fraud free and transparent traffic



Sustainable SaaS revenue growth



Long customer lifetimes

Acquisition rationale



Strong SaaS-IP with ample growth potential



Adding critical mass; additional demand and supply



Substantial synergies with games through reach



Transformative deal with stable, long-term EBITDA



Financially attractive deal ticking multiple boxes

High level financials

Monetization solution via ads for publishers which own Mobile Apps, Web Sites, Video content

EUR 30-40m
Revenues

~30%
EBITDA margin

Strong
Organic growth²

Footprint
Revenues in North America, Europe, Asia & LatAm

Revenues
From long-term SaaS clients

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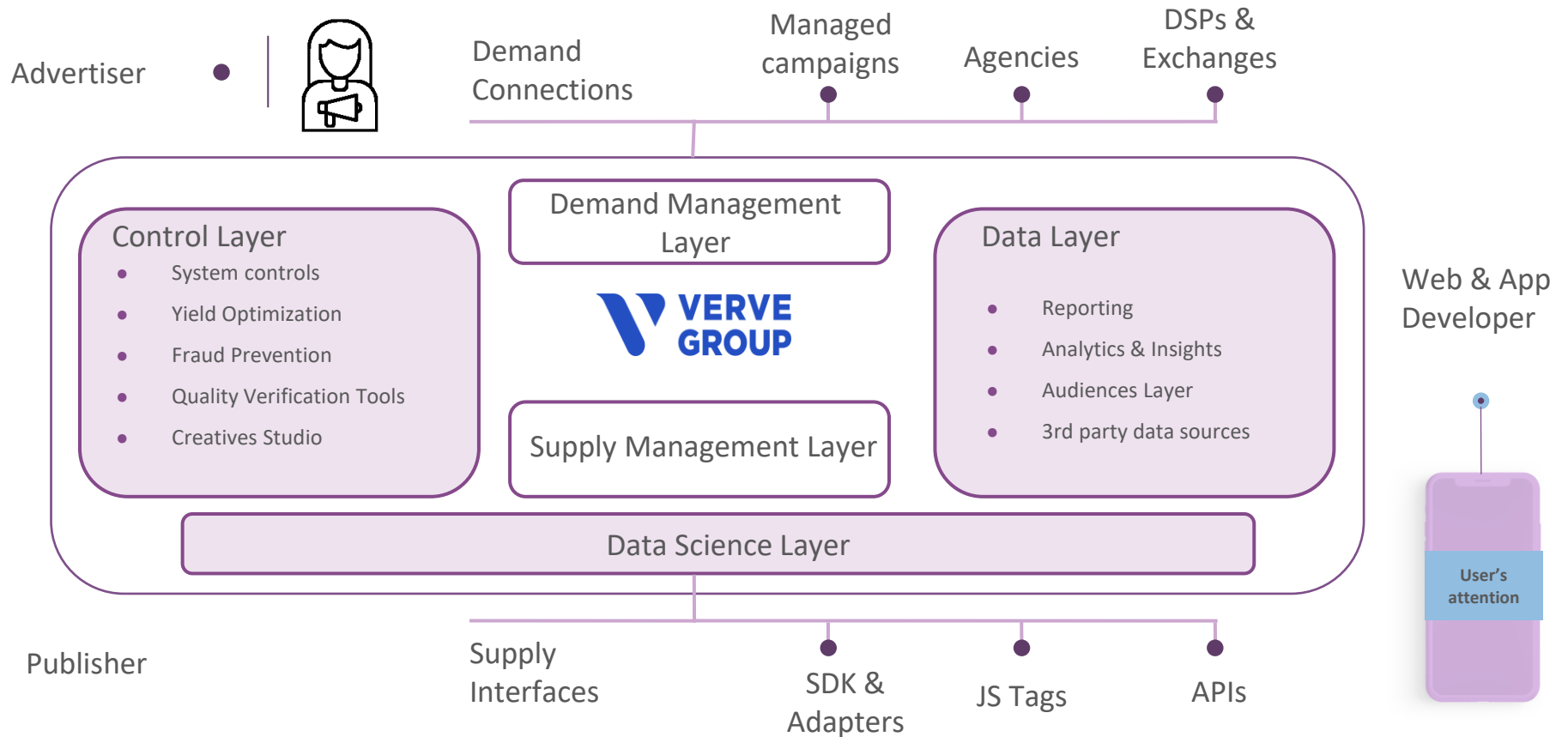
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Verve Group's open platform

An Open Garden Omnichannel Marketing Ecosystem Centered Around User Privacy



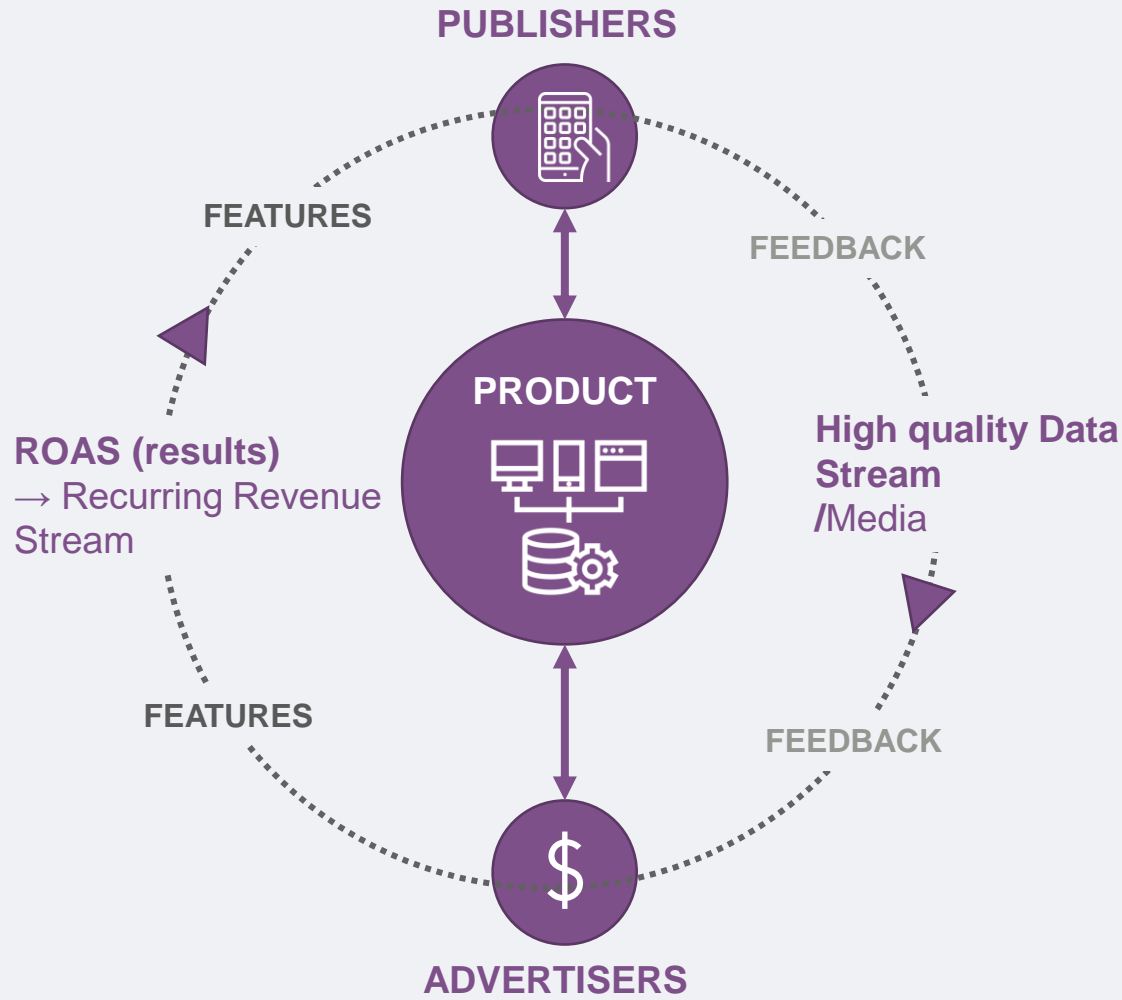
Overview over our (sales) structure



Source: Group information

Media Growth Engine - Flywheel

Organic growth through feedback loops and innovations



- **Feature feedback loops**
 - Integration
 - Cost optimization
- **Innovations**
 - Having access to both sides of the stack

Technical Innovation: Verve ATOM

On device audiences

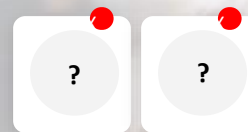
ATOM = Anonymized Targeting on Mobile

- Proprietary solution to the targeting restrictions in Apple's iOS 14.5 update
- Building anonymized audiences on the user's device
- Data used:
 - Device data
 - App metadata
 - Advertisement interactions
- Behavioral Characteristics derived from data:
 - Age Group
 - Gender
 - Interest
- No need for a personal mobile device identifier

Turn your

X%

unknown,
anonymized IDFA users



App Context

Ad Context

To

100%

known,
addressable
audiences





SaaS Ad Monetization Toolkit for Publishers:

- In-house monetization stack built on top of publisher's own tech
- Open platform provides flexibility to connect to any DSP or exchange bidder of their choice
- Advanced reporting and debugging tools.

Service and Demand:

- Self Service and own AM
- SaaS pricing
- PMP packages
- Direct billing (20+ demand partners)

Tech:

- Open-source SDK
- S2S in-app bidding
- Hosted Prebid server

Analytics:

- Real-time analytics
- Full bidstream reporting
- User level AdLTV

Privacy and Tools:

- First-party audiences
- TCF 2.0 - CMP
- User level DMP
- Ad verification (GeoEdge)
- OMSDK - IAB

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- VI. Growth opportunities
- VII. Organic growth



VIII. Demo

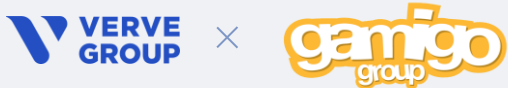
- IX. Case studies
- X. Conclusion
- XI. Q&A



Insight into our platforms - Demo

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Reaching new audiences across the Open Web

Utilizing our full stack solution and products ranging from a DSP to an Exchange and SSP, to reach new players for Gamigo's games

"Next to creating attractive content for our games, efficient user acquisition is one of the main success factors for us. By having the expertise of both gaming and media in-house at MGI, we benefited significantly from the synergies, increasing our installs by 77% and active users by 120%, and allowing us to build stronger retention and playtime for our games."

Challenge:

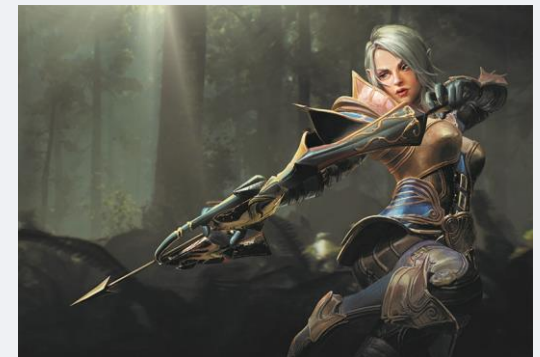
Gamigo Titles have been trying to acquire new users outside of the walled gardens

Solution:

With the help of our end to end user acquisition and monetization solution we've been able to target new audiences across the open web for 3 of our main titles: Trove, Archage, Rift

Result:

- **10-15%** conversion rate
- **200k** users reached
- **100-200%** ROAS





The Meet Group Expands Verve Group Partnership With Hybrid Integration Setup

Target: US
Category: Social
Duration: 3 months
Devices: Mobile (Android)

“Verve Group has grown to be a very strong partner of ours because of their flexible and diverse integration options. We currently utilize JS tags, Amazon TAM integration, and HyBid SDK. Each method has been incremental to both our Verve Group revenue and total ad revenue.”

- Nick Hermansader,
SVP of Advertising at The Meet Group

Objective:

The Meet Group wanted to **increase overall revenue** for their Tagged, MeetMe, and Skout apps while also continuing to increase the share of their inventory that is purchased through **in-app bidding**. They were also searching for a reliable partner with **flexible integration options** and bidding capabilities to increase the efficiency of their ad stack across an **array of ad formats**.

Solution:

The Meet Group first integrated Verve Group’s monetization solution using JS tags in a waterfall setup and more recently integrated **HyBid SDK for in-app bidding**.

By adding in-app bidding via the SDK to its monetization stack, The Meet Group **increased revenue from Verve Group by 32% within 3 months** of completing this **hybrid setup**. They are also connected via Amazon TAM.

Verve Group served high-quality banners, videos, and native ads — in this hybrid setup of waterfall, TAM, and in-app bidding — to engaged users in the US and has become one of The Meet Group’s **top 5 demand partners**.

Result:

 **Top 5**
Demand Partners

 **+32%**
Verve Group Revenue Increase*





Meitu Generates 2x More Revenue With Verve Group's Ad Tag

Devices: Mobile, iOS and Android

"After integrating Verve Group's Ad Tag and API, we've seen excellent results and a major increase in revenue on our BeautyPlus app. Verve Group is a trusted partner that allows us to access high-quality international demand without jeopardizing the in-app experience."


Objective:


Meitu wanted a flexible yet effective solution for monetizing its photo-editing apps, particularly BeautyPlus, using a reliable and transparent partner that would help maximize its programmatic ad revenue.

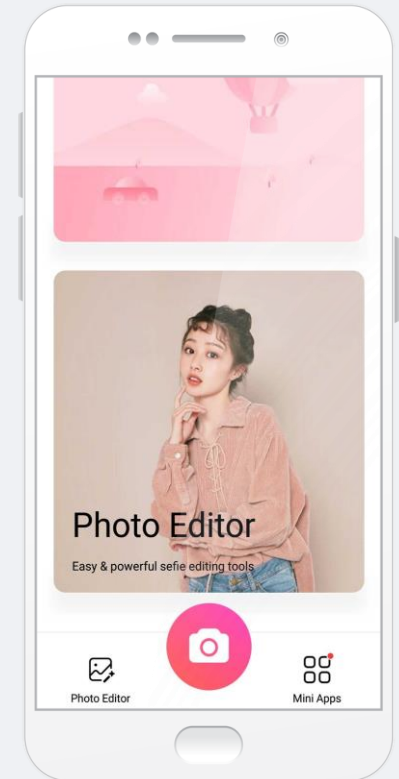
Solution:

Meitu chose to integrate Verve Group's monetization technology via its Ad Tag and API in an effortless process without adding additional weight to its apps. Leveraging Verve Group's premium and global demand, Meitu increased its revenue by 280% on BeautyPlus for Android and 86% for iOS, while offering a positive user experience for their target audiences, allowing them to serve more branding ads.

Result:

 **+280%** revenue increase on Android

 **+86%** revenue increase on iOS



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Clear roadmap: an integrated Media & Games company

Strong revenue CAGR of +30% combined with 25-30% EBITDA margin

- ✓ **Low business risk focus**
Recurring steady revenue streams: MMO games and SaaS media revenues
- ✓ **Strong organic growth**
In Gaming; new content and game launches
In Media; scaling existing & adding new media accounts
- ✓ **Utilizing strong synergies between Gaming and Media**
Most efficient gamer acquisition and unique know-how and advertising inventory
- ✓ **Synergetic M&A**
Over 30 accretive transactions, well filled pipeline, for Gaming as well as Media
- ✓ **Integrating acquired targets within Gaming (gamigo) or Media (Verve)**
Leads to substantial efficiency gains & economies of scale

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To ask a question please dial-in on one of the numbers below. After you have left name and company, you will press 01 to enter the queue.

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