



Update

November 2018

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First SaaS Agreement – Mater Lottery

13 Nov 2018: 5+5 year Software as a Service agreement announced

- Provide a complete lottery software platform to assist in future growth.
- In addition to existing product reseller agreement.
- Important milestone in plans to expand into other Charity lotteries in Australia, Canada and UK.



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Charity Lottery Market

Charity Ticket Sales:

- Australia +-A\$1.0 bil – 20% within about 2 years
- Canada and UK similar markets to Australia +-A\$2.5 bil¹

Licence fee: Single digit percentages circa 2% to 5% of ticket sales

Licence term: Circa 5+5 years

¹Source: Charity Intelligence Canada; UK Gambling Commission



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Global SaaS Lottery Market

State and Charity Lotteries worldwide find it difficult to keep up with technology and attracting younger demographics.

Charity Lotteries (prizes below \$5mil) in need of a complete lottery solution are a priority.

State Lotteries (prizes above \$5 mil) in need of specific software components are also catered for.



Business Strategy

Complementary businesses



Ticket Sales

- Domestic
- Established



Software Licensing

- Global
- Emerging



Good Start to the Year



Aug 2018: \$50m, \$80m, \$100m

Nov 2018: \$40m, \$60m

FY 17: 31 Large Jackpots (\geq \$15 mil OZ/PB).

FY18: 32 Large Jackpots.

FY19: 20 Large Jackpots to 15 Nov 2018.



Aug 2018: \$50m, \$70m

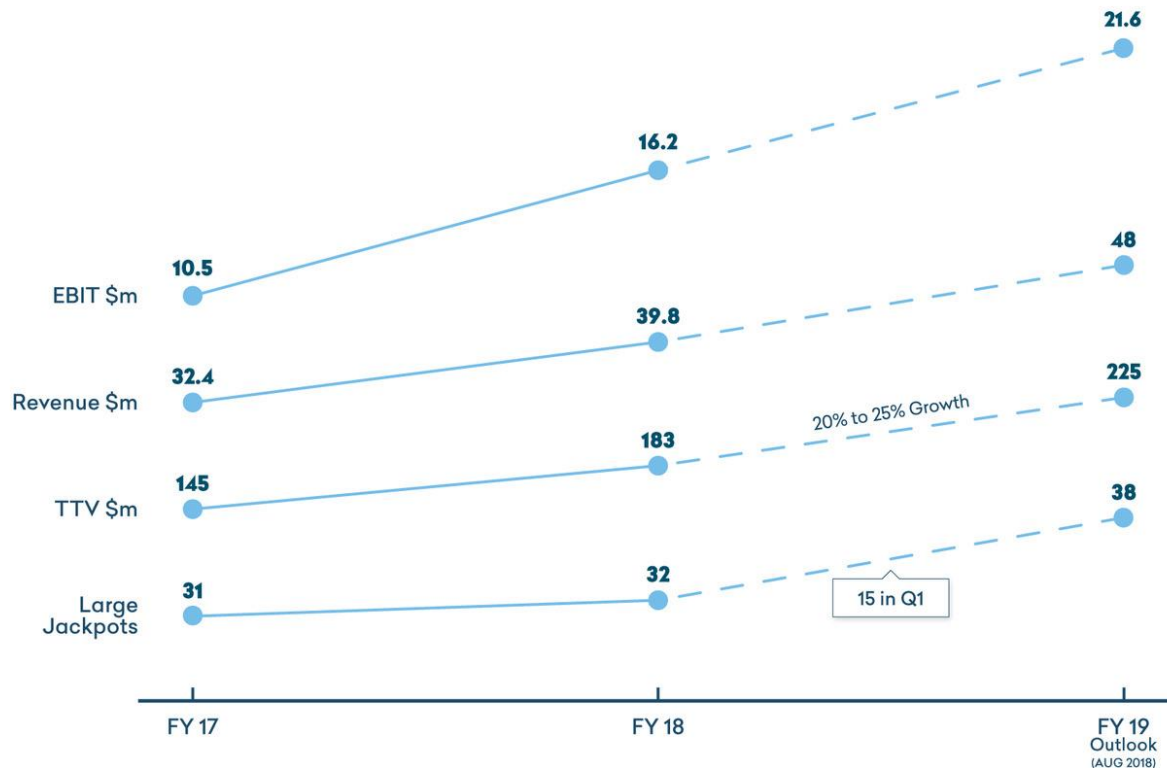


Scalability

FY 19 Outlook

- \$70m OzLotto and \$100m Powerball within the first 2 months of FY19 required an Outlook statement
- Assumed 38 Large Jackpots for the year
- 15 Large Jackpots in Q1

Scalability being displayed in EBIT to TTV to number of Large Jackpots



Like-for-Like Comparisons

Powerball \$8m and \$12m

August 2018:

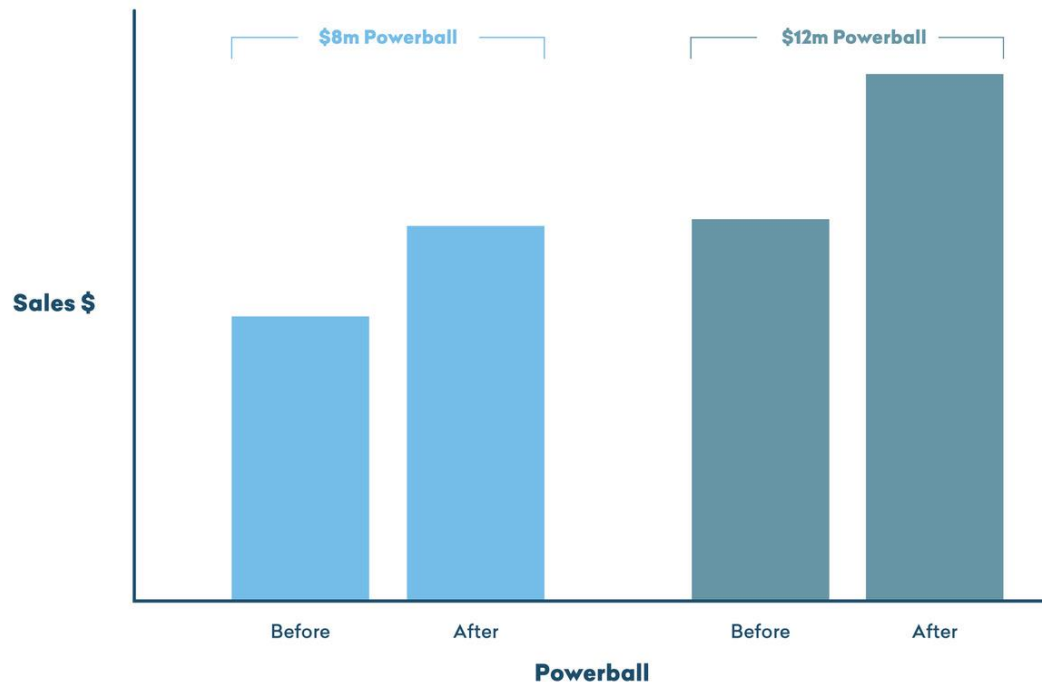
OzLotto reached \$70m

Powerball reached \$100m

(Half of \$100m won by an
OzLotteries customer in his 20's

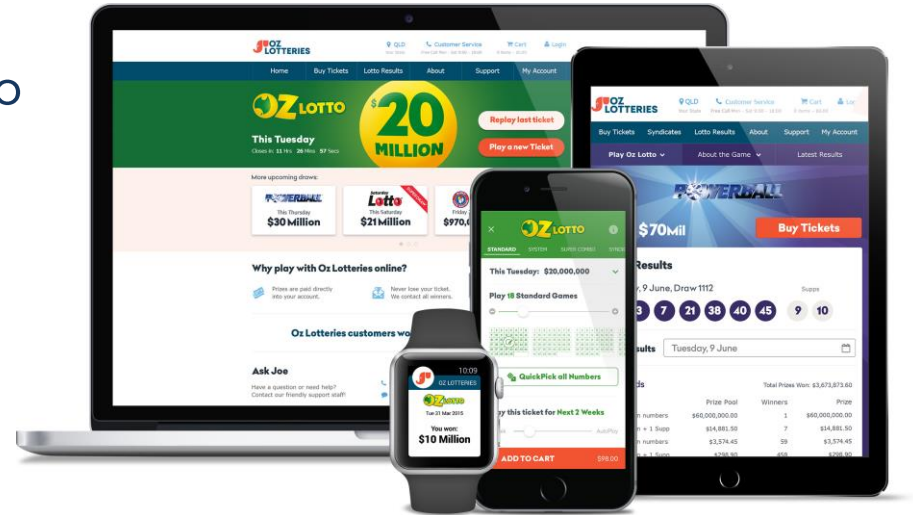
Positive Effect after August

- Increased like-for-like draw sales
- More customers
- Increased excitement in lotteries



New Software Platform

- Game-changer for Jumbo
- 3 year project to rewrite the Jumbo Lottery Software Platform
- Live in 2017
- Improved performance
- Faster response times
- Sleeker user interface
- Immediate impact



Innovations

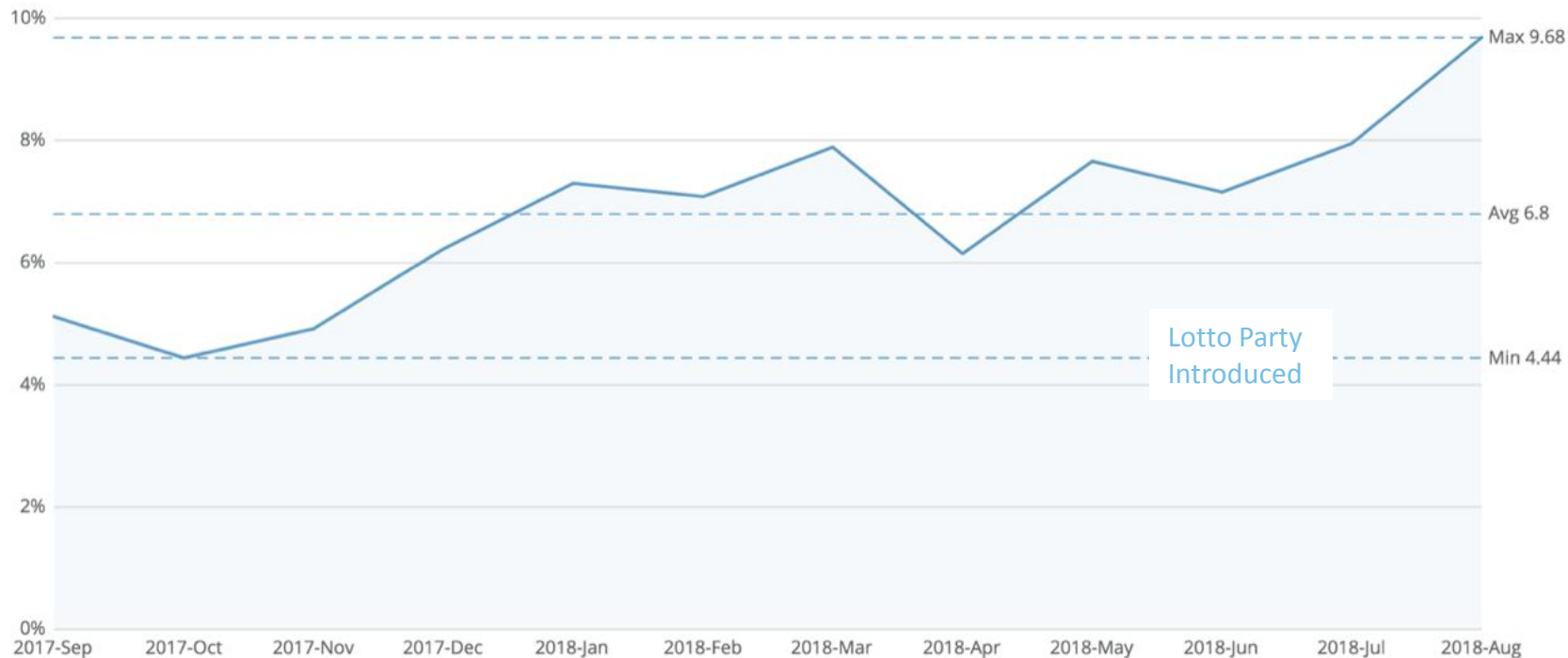
Driving a cultural shift in lottery play

- Group Play brings together friends and colleagues to share the excitement.
- Different appeal than single ticket sales.
- Helps combat “Jackpot Fatigue”.
- Drives growth through “Refer a friend”
- Younger demographic appeal



Lotto Party

Group Play %age of overall sales



Internet Lotteries – A Growing Market

18% of Australian lotto tickets sold on the Internet

- Up from 14.5% FY2017
- The UK is 22% (2016: 20.9%)¹
- Finland is 48% up 17% in 2016²



SOURCE:

¹Camelot UK Lotteries Ltd, Company Annual Report and financial statements for the year ended 31 March 2017

²Public Gaming Research Institute 17 February 2017

Industry Leaders

Jumbo is aligned very closely with the largest and most dominant company in the Australian Gaming Industry.

- Long term contracts until 2022
- Tabcorp invested \$15.6 mil
- Tabcorp market cap \$9.7 bil



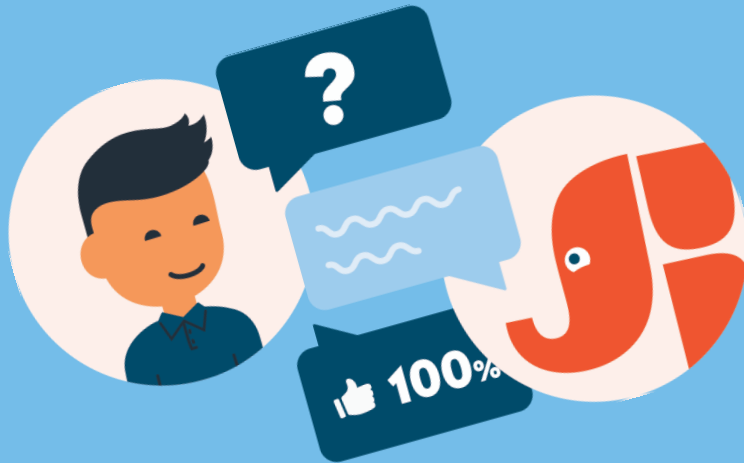
Trend to Mobile – 5-Star App

- Full native purchasing
- Results notifications
- Apple watch support
- 75% of interactions
- 5-Star App



Customer Engagement

User Testing, Customer Support, Smarter Messaging



"Probably the best service I have had in the past 10 years dealing with all sorts of services. In fact, it was so good I was little stunned. Thank you."

"Very impressed with the manner I have been receiving. Congratulations on great staff. This is what makes good service."

Key Performance Indicators 2018



2017

Avg Spend per Customer - \$348.40
 Active Online Customers - 354k
 New Online Accounts - 161k
 CPL - Cost Per Lead - \$17.09

Record Full Year Results

	FY Jun 18	FY Jun 17	% Ch pcp
TTV – Ticket Sales	\$183.1M	\$145.3M	26% up
Revenue	\$39.8M	\$32.4M	23% up
NPAT – Cont’ Ops	\$11.8M	\$7.6M	55% up
NPAT – Group	\$12.1M	\$5.6M	115% up
EBIT	\$16.2M	\$10.5M	55% up
Large Jackpots	32	31	3.2% up

Balance Sheet

Strong cash and asset position

May 2017

Tatts invests \$15.6 mil

FY2018

Fully Franked Dividends Declared

Ordinary – 18.5c (2017: 8.5c)

Special – 8.0c (2017: 15.0c)

TOTAL – 26.5c (2017: 23.5c)

	30 Jun 2018 A\$ mil
Current Assets	\$ 48.5
Non-current Assets	\$ 14.4
TOTAL ASSETS	\$ 62.9
Current Liabilities	\$ 15.2
Non-current Liabilities	\$ 0.5
TOTAL LIABILITIES	\$ 15.7
NET ASSETS	\$ 47.2

Future Outlook

20/20 Vision

22% Online players by 2020

Innovations

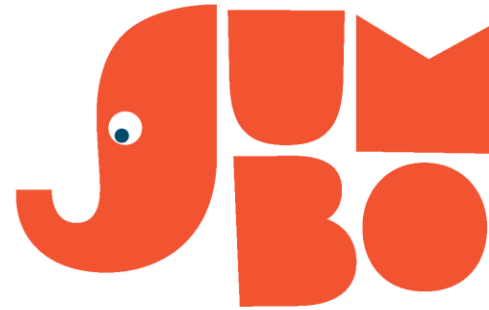
Voice and Lotto Party

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Software as a Service

Continued growth

Growing customer database and increased mobile purchases



JUMBO

Always thinking big

The Jumbo Team



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