



Ainsworth Game Technology Ltd

ABN 37 068 516 665

10 Holker Street,
Newington NSW 2127
Tel: +61 2 9739 8000

www.agtslots.com.au

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ASX Market Announcements Office
Exchange Centre
20 Bridge Street
Sydney NSW 2000

ELECTRONIC LODGEMENT

Investor Presentation -Six Months Ended 30 June 2023

We attach a copy of the Investor Presentation in respect of Ainsworth Game Technology's results for the six months ended 30 June 2023.

For the purposes of ASX Listing Rule 15.5, this document is authorised for lodgment with the ASX by the Board.

Yours faithfully

A handwritten signature in blue ink, appearing to read 'Mark Ludski'.

Mark Ludski
Company Secretary



Investor's Presentation

Results for 6 months ending 30 June 2023



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- The receipt of this document by any investor or potential investor shall constitute such investor's or potential investor's acceptance of the foregoing terms and conditions.

Agenda

- Results Summary
- Consolidated Results
- Segment Performance
- Land Based Gaming Products
- Online
- Conclusion



Results Summary

Results Summary

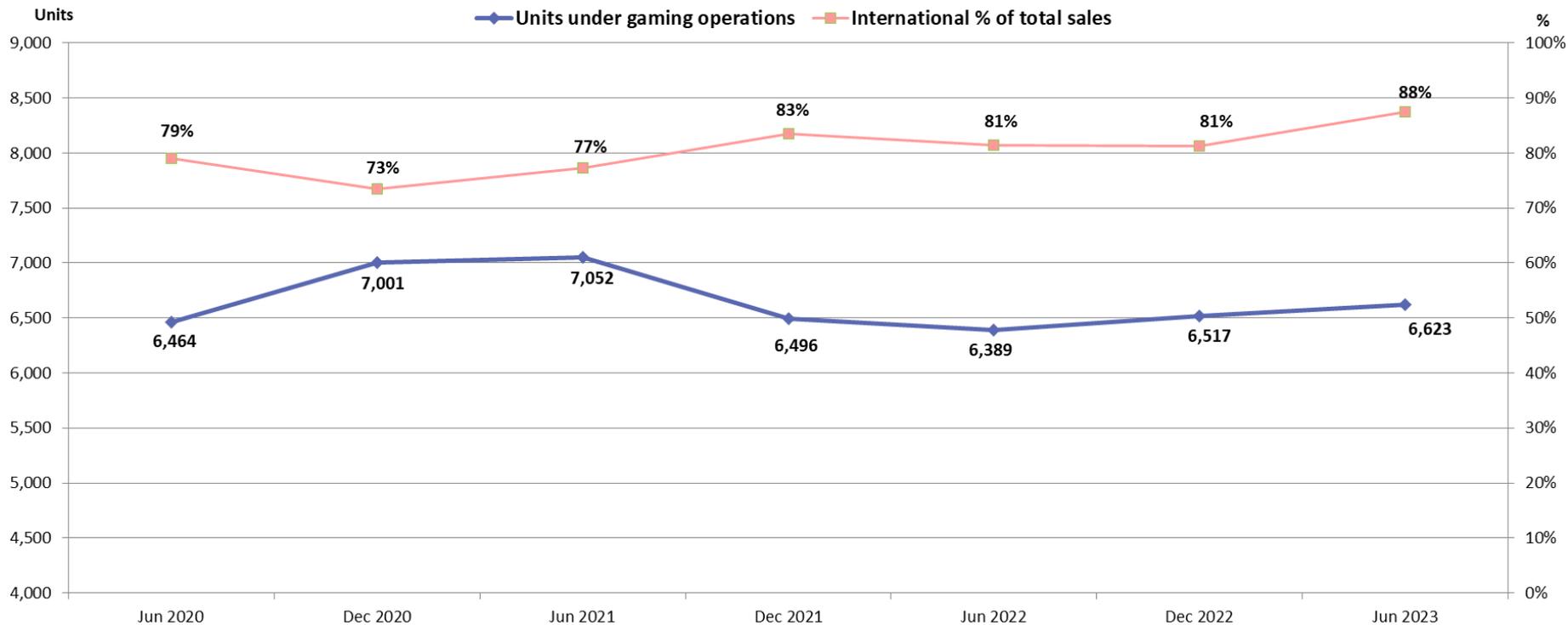
- Profit before tax normalised for currency and one-off items of \$23.3m for the 6 months ended June 2023 (“Current period”), an improvement of 24% compared the 6 months ended 31 December 2022 (“prior half”) and the 6 months ended 30 June 2022 (“PCP”).
- North America continues to be the strongest segment performer, contributing 48% of total revenue, similar to prior half.
- Net cash position of \$24.6m, compared to the net cash position of \$29.3m at 31 December 2022, despite an improvement in operating cash flows. Reduction in net cash position due to investments made in Argentina to mitigate devaluation of Argentinian Pesos against USD.
- Dividend continues to be suspended to provide strong liquidity to allow the Company to continue to invest in R&D to deliver competitive products and to navigate the volatile macro conditions in LATAM.

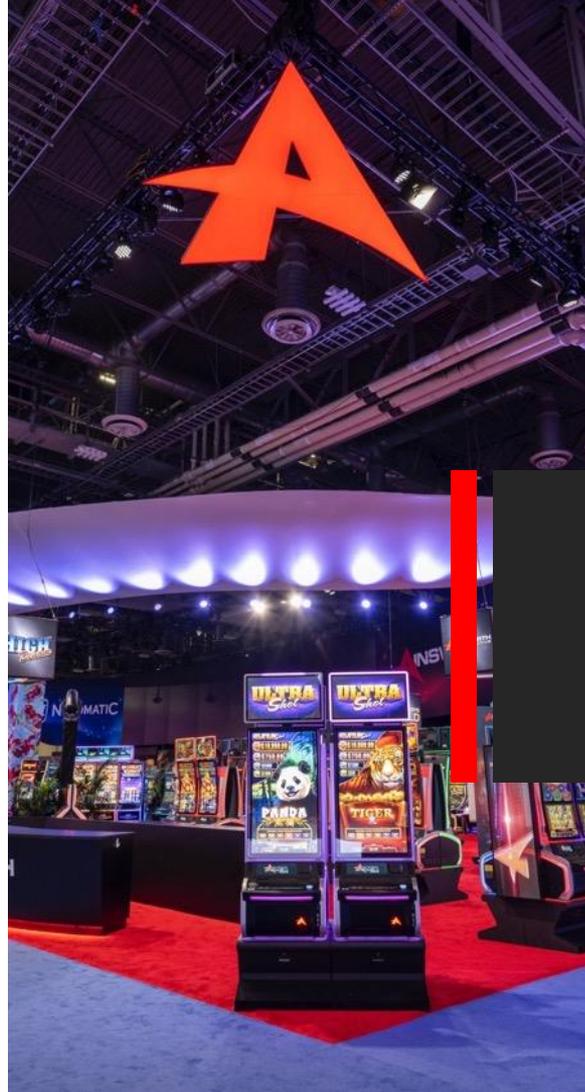
<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	6 months ended 30 June 2022 (PCP)	Current period vs Prior half	Current period vs PCP
Revenue	143.6	124.1	119.5	19.5	24.1
Underlying EBITDA	25.8	26.4	29.4	(0.6)	(3.6)
Investment writedown	12.9	-	-	12.9	12.9
GAN exclusivity revenue	1.9	-	-	1.9	1.9
Provision for Mexican duties and other charges	-	5.5	16.5	(5.5)	(16.5)
Impairment losses – LATAM and Australia and Other CGU	-	3.9	5.2	(3.9)	(5.2)
Profit before tax excluding currency and one-off items	19.7	18.8	18.8	0.9	0.9
Reported Profit after tax	(3.7)	5.9	2.7	(9.6)	(6.4)

The increase in provision for Mexican duties and other charges recognised in this reporting period relates to CPI adjustments and therefore has not been considered as one-off item.

Gaming Operations

with recurring revenues and steady international sales contribution





Consolidated Results

Profit & Loss Summary

<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	6 months ended 30 June 2022 (PCP)	Current period vs Prior half	Current period vs PCP
Domestic revenue	17.9	23.2	22.2	(5.3)	(4.3)
International revenue	125.7	100.9	97.3	24.8	28.4
Total revenue	143.6	124.1	119.5	19.5	24.1
Gross profit	86.9	79.7	71.2	7.2	15.7
EBITDA	10.4	14.9	12.5	(4.5)	(2.1)
EBITDA Margin %	7%	12%	10%	(5%)	(0.0)
Profit Before Tax	4.3	7.3	1.9	(3.0)	2.4
Income tax (expense) /	7.9	(1.4)	0.8	9.3	7.1
Profit After Tax	(3.7)	5.9	2.7	(9.6)	-6.4
R&D (% of revenue)	15%	16%	14%	(1%)	1%
EPS (diluted) (A\$)	1.2 cents	1.8 cents	0.7 cents	(0.6 cents)	0.5 cents

- Increased revenue in the current period compared to prior half due to higher sales in Argentina within LATAM market and North America. Sales in Argentina during this half is not expected to be repeated due to restrictions in importation permits by the government.
- Normalised PBT for currency impact, one-off items was a profit of \$23.3m in the current period compared to \$18.8m in both prior half and pcp.
- EBITDA of \$14.0m includes \$4.4m currency translation losses, compared to \$2.1m losses in prior half.

Results Adjusted for Currency Movement and One-off Items

<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	6 months ended 30 June 2022 (PCP)	Current period vs Prior half	Current period vs PCP
Profit Before Tax	7.9	7.3	1.9	0.6	6.0
Foreign currency losses / (gains)	4.4	2.1	(4.7)	2.3	9.1
GAN exclusivity revenue	(1.9)	-	-	(1.9)	(1.9)
Investment writedown	12.9	-	-	12.9	12.9
Rent concessions	-	-	(0.1)	-	0.1
Provision for Mexican duties and other charges	-	5.5	16.5	(5.5)	(16.5)
Impairment losses – LATAM and Australia and Other CGU	-	3.9	5.2	(3.9)	(5.2)
Adjusted For Currency and One-off Items Profit Before Tax	23.3	18.8	18.8	4.5	4.5

Reconciliation: Profit Before Tax to EBITDA & Underlying EBITDA

<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	6 months ended 30 June 2022 (PCP)	Current period vs Prior half	Current period vs PCP
Reconciliation:					
Profit Before Tax	7.9	7.3	1.9	0.6	6.0
Net interest income	(4.3)	(3.3)	(0.8)	(1.0)	(3.5)
Depreciation and amortisation	10.4	10.9	11.4	(0.5)	(1.0)
Reported EBITDA	14.0	14.9	12.5	(0.9)	1.5
Foreign currency losses / (gains)	4.4	2.1	(4.7)	2.3	9.1
GAN exclusivity revenue	(1.9)	-	-	(1.9)	(1.9)
Investment writedown	12.9	-	-	12.9	12.9
Rent concessions	-	-	(0.1)	-	0.1
Provision for Mexican duties and other charges	-	5.5	16.5	(5.5)	(16.5)
Impairment losses – LATAM and Australia and Other CGU	-	3.9	5.2	(3.9)	(5.2)
Underlying EBITDA	29.4	26.4	29.4	3.0	-

The GAN exclusivity revenue relates to the acceleration of revenue as a result of the GAN contract amendment on 29th March 2023. Investment write-down relates to the recoverability on the investments made in Argentina due to uncertainty in local macro conditions.

Operating Costs

<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	6 months ended 30 June 2022 (PCP)	6 months to 30 Jun 2023 at Prior half currency basis	6 months to 30 Jun 2023 at PCP currency basis	Current period vs Prior half	Current period vs PCP
COGS	56.7	44.4	48.3	57.1	54.0	12.3	8.4
Sales, service and marketing ("SSM")	30.3	31.1	27.0	30.7	27.6	(0.8)	3.3
R&D	21.8	19.4	17.3	21.9	21.1	2.4	4.5
Administration	14.0	12.9	10.1	14.1	13.4	1.1	3.9
Total Operating costs	122.8	107.8	102.7	123.8	116.1	15.0	20.1
Gross profit	86.9	79.7	71.2	87.7	81.5	7.2	15.7
Gross profit margin %	61%	64%	60%	61%	60%	(3%)	1%

COGS

- Increased in costs attributable to increased sales compared to the prior half and pcp.
- Favourable translation impact of \$0.4m at prior half currency basis and adverse translation impact of \$2.7m at pcp currency basis.

SSM Costs

- SSM costs over total revenue was 21%, compared to 25% at prior half and 23% at pcp. Increase compared to prior half and pcp is directly attributable to increased variable selling costs, personal costs and marketing costs.
- Favourable translation impact of \$0.4m at prior half currency basis and an adverse impact of \$2.7m at pcp currency basis.

R&D Costs

- Increase in costs compared to the prior half and pcp were attributable to an increase in evaluation and testing expenses, personnel costs and engagement of new studios in North America.
- Favourable translation impacts of \$0.1m at prior half currency basis and adverse impact of \$0.7m at pcp currency basis.

Administration Costs

- Increase in costs compared to the prior half and pcp as a result of increase in personnel costs and professional fees.
- Favourable translation impact of \$0.1m at prior half currency basis and an adverse impact of \$0.6m at pcp currency basis.

Staff Headcount

# Staff	30-Jun-23	31-Dec-22	30-Jun-22
Australia and Rest of the World			
Sales	31	31	27
Service	56	51	54
Production	30	26	26
Administration	22	22	22
R&D	96	97	93
Total Staff Numbers - Australia & Rest of the World	235	227	222
Americas			
Sales	27	31	32
Service	63	61	59
Production	58	53	46
Administration	87	77	69
R&D	76	50	49
Total Staff Numbers - North and Latin America	311	272	255
Total Staff Numbers - Consolidated AGT	546	499	477

Net Profit Bridge – Current period vs PCP



- Revenue increase across most markets but predominately in Latin America and North America as well as increase in online revenue as a result of GAN contract occurred during the current period.
- \$12.7m increase in overheads from increased development initiatives undertaken by the Company to expedite growth as well as global inflationary cost pressures.
- \$6.8m decrease in other expenses as pcP included one-off items such as recognition of provision on SAT audit and write-down of assets for LATAM and 'Australia and Other' CGUs which was offset by the full write down of investment in Argentina.
- \$9.2m favourable FX movement predominantly related to a lower gain on foreign exchange due to the strengthening of the US dollar against the AU dollar in the current period compared to the pcP.

Balance Sheet

<i>In millions of AUD</i>	30-Jun-23	31-Dec-22	30-Jun-22
Total assets	429.6	425.7	406.5
Net assets	327.9	320.2	311.3
Total debt	-	0.6	-
Net cash	24.6	29.3	45.8

Debt Ratios	30-Jun-23	31-Dec-22	30-Jun-22
Debt ratio (Total liabilities / Total assets)	24%	25%	23%
Debt to equity ratio (Total liabilities / Total equity)	31%	33%	31%
Six-month Cash flow to debt ratio - (Cash flow from operating activities / Total liabilities)	12%	(5%)	22%

- Receivables closing balance of \$118.5m as at 30 June 23 (31 December 22: \$115.5m, 30 June 22: \$112.7m) resulted in an improved receivable turnover ratio compared prior periods due to higher revenue achieved during the current period.
- Inventory closing balance of \$89.2m (31 December 22: \$90.1m, 30 June 22: \$68.3m). Similar inventory levels compared to prior half and increase in inventory compared to pcq to mitigate supply chain challenges.

Cash Flow Statement

- Cash balance as at 30 June 2023 was affected by payments for investments in Argentina to hedge the rapid devaluation of Pesos against USD.
- Improvement in operating activities cash flow driven by discipline working capital management.

<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	Current period vs Prior half
Net cash from / (used) in operating activities	12.1	(5.3)	17.4
Proceeds from sale of property, plant and equipment	0.1	0.1	-
Proceeds from investment	1.1	-	1.1
Interest received	-	-	-
Acquisitions of property, plant and equipment	(3.1)	(2.0)	(1.1)
Development expenditure	(3.4)	(1.9)	(1.5)
Payments for investments	(10.0)	(4.9)	(5.1)
Net cash used in investing activities	(15.3)	(8.7)	(6.6)
Borrowing costs paid	(0.5)	(0.6)	0.1
Proceeds from borrowings	-	0.4	(0.4)
Repayment of borrowings	(0.6)	(0.4)	(0.2)
Proceeds from finance lease	0.2	0.7	(0.5)
Payment of lease liabilities	(1.1)	(1.1)	-
Net cash used in financing activities	(2.0)	(1.0)	(1.0)
Net (decrease) / increase in cash and cash equivalents	(5.2)	(15.0)	9.8
Opening cash and cash equivalents	29.9	45.8	(15.9)
Effect of exchange rate fluctuations on cash held	(0.1)	(0.9)	0.8
Cash and cash equivalents at reporting date	24.6	29.9	(5.3)



Segment Performance



LEGACY TO CREATE



North America

<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	6 months ended 30 June 2022 (PCP)	Current period vs Prior half	Current period vs PCP
Revenue	68.5	59.7	60.5	8.8	8.0
Gross Profit	43.8	43.4	38.8	0.4	5.0
Segment EBITDA	35.5	36.7	33.8	(1.2)	1.7
Segment Profit	29.5	30.9	28.4	(1.4)	1.1
Segment Profit (%)	43%	52%	47%	(9%)	(4%)
Unit Volume (no.)	1,155	922	1,122	233	33
ASP (US\$'000's)*	20.3	19.4	17.2	0.9	3.1
Game Operations – Class II Installed Base (Including HHR)	2,258	1,979	1,679	279	579
Game Operations – Class III Installed Base	815	848	892	(33)	(77)
Average Fee per Day (US\$)	33	33	34	-	(1)

*Excludes distributor sales, reworks and on-charges

- Revenue of \$68.5m in the current period, an increase of 15% compared to the \$59.7m revenue in the prior half and 13% compared to pcp.
- Participation & lease revenue of \$23.5m and contributing 34% of the current period's segment revenue, a decrease of 6% on prior half and consistent with the 33% over pcp. The increase Class II installed base predominantly occurred in Alabama.
- HHR connection fees now contributes 19% of this segment total revenue, similar to prior half and an increase on the 16% in pcp. We have now 6,811 units (+1,301 units compared to 31 December 2022) connected to our HHR system, generating recurring revenue.
- Continued strong performance in game operations in Class II continues to drive this segment's performance. New installs occurred in additional properties in New Hampshire, Alabama and Texas. These locations are driving win per day at up to double the rate of previous Class III and Class II installations. We anticipate continued momentum in this area as new installations occur in Kentucky, New Hampshire and Wyoming.

North America Product Highlight

- Strong performance of new Squish Reels™ game in South Dakota.
- New games set expected to be launched in Louisiana, following the success of previous games.
- First set of games being installed in Nevada in July 2023.
- Next generation of Gambler's Gold™ to add successful QuickSpin™ slot content and additional Keno options.
- Nevada / Class III product updated for better presentation and player attractiveness.
- QuickSpin™ released on South Dakota VLT product and maintaining strong performance.
- New contract established with Golden Gaming for another year (commencing 1st October 2023) of exclusivity at Montana.



**QUICK
SPIN**

**GAMBLER'S
GOLD**

Latin America & Europe

<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	6 months ended 30 June 2022 (PCP)	Current period vs Prior half	Current period vs PCP
Revenue	45.5	33.2	30.3	12.3	15.2
Gross Profit	29.5	21.8	18.4	7.7	11.1
Segment EBITDA	21.3	9.7	10.0	11.6	11.3
Segment Profit	22.1	10.4	10.7	11.7	11.4
Segment Profit (%)	49%	31%	35%	18%	14%
Unit Volume (no.)	1,277	911	1,007	366	270
ASP (US\$'000's)*	19.5	18.4	18.2	1.1	1.3
Game Operations – Installed Base	3,550	3,690	3,818	(140)	(268)
Average Fee per Day (US\$)	12	12	11	-	1

*Excludes distributor sales, reworks and on-charges

- Delivered higher than expected revenue, ASP and profit due to incremental sales levels on strong performance results, reflecting an increase of 37% compared to prior half and current period revenue increased 50% compared to the pcp. Approximately \$9m in sales revenue this period is a result of accelerated deliveries to Argentina which will not repeat next period due to importation restrictions.
- Of the 1,277 machines AGT sold in the period, 12% were reconditioned units, compared to 20% in prior half and 35% in pcp, contributing higher revenue and profit.
- Game operations is predominantly flat compared to prior periods but expects significant increase in installation base as new units are activated in Mexico.
- Demand continues to grow for the A-STAR™ range of cabinets, in particular Xtension Link™. Game themes such as Pan Chang™, Cash Stacks™ and Multi-Win™ range of games are amongst the region's top performers.

Asia Pacific (Australia, NZ and Asia)

<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	6 months ended 30 June 2022 (PCP)	Current period vs Prior half	Current period vs PCP
Revenue	21.2	24.9	22.7	(3.7)	(1.5)
Gross Profit	5.1	8.0	7.5	(2.9)	(2.4)
Segment EBITDA	0.1	3.1	3.5	(3.0)	(3.4)
Segment Profit	(0.2)	2.3	2.8	(2.5)	(3.0)
Segment Profit (%)	(1%)	9%	12%	(10%)	(13%)
Unit Volume (no.)	617	830	795	(213)	(178)
AU ASP (ex rebuilds) (\$A'000's)	24.2	23.6	22.9	0.6	1.3

- Minimal corporate sales and competitive market conditions in this period compared to prior half and pcp.
- Segment profit decreased due to fixed costs with lower revenue achieved in this half.
- Improved ASP despite competitive market conditions, however overall reduction in Gross Profit % with continuing inflationary pressures and weakening of AUD against USD, adversely impacting costs of production.
- Drop in units in this period mainly contributed from Australia sales. The showcase of A100 in AGE 2023 was positive and is expected to lift sales in 2H.
- Increase in unit sales related to Asia with market recovery post pandemic. Change in sales distributor and new venue openings specifically in Philippines is expected to drive revenue in this market in future periods.
- Grand Fortune has continued to operate above house average in both NSW and QLD. Fortune Bull is the strongest game within this brand and is performing above 1.5x house average.

Online

<i>In millions of AUD</i>	6 months ended 30 Jun 2023 (Current period)	6 months ended 31 Dec 2022 (Prior half)	6 months ended 30 June 2022 (PCP)	Current period vs Prior half	Current period vs PCP
Revenue	8.4	6.4	5.9	2.0	2.5
Gross Profit	8.4	6.4	5.9	2.0	2.5
Segment EBITDA	8.1	5.5	5.3	2.6	2.8
Segment Profit	8.1	5.5	5.3	2.6	2.8
Segment Profit (%)	96%	86%	90%	10%	6%

- The increase in online revenue predominantly resulted from the acceleration of GAN revenue and 1,250,000 GAN shares issued to AGT based on the GAN contract amendment executed on 29th March, 2023. As part of the amendment, GAN's exclusivity will terminate on 31st March 2024. Upon termination of this contract, AGT will directly integrate with USA operators.
- Drop in Segment Profit Margin with investments carried out in online studio through establishment of a new innovative gaming studio called Neon Line, dedicated to meeting the specific needs of online players and enhancing their gaming experiences on mobile devices.



Land Based Gaming Products



Key Market Highlights

NORTH AMERICA

- Released Treasure Spirits™, Cash Stacks Gold™ and Ultra Shot™ game series, each showing measurable improved performance in Class III markets.
- Placed 400+ HHR games in route at Victoryland Casino (Alabama).
- Growth in VLT space includes 250 units placed in Louisiana and 200 units placed in South Dakota.
- Gambler's Gold™ MultiGame Product approved and available in Nevada with additional titles and improved configurations.
- GOU Route shows growth with 200+ units compared to previous 6 months.
- High Denom content continues to thrive, regularly having multiple games on industry Top 25 indexes (Eilers and ReelMetrics).
- Games from newly formed Austin and Reno studios to be shown at G2E 2023 along with debut of titles from Sydney and Las Vegas studios.



Key Market Highlights

LATIN AMERICA

- Demand continues to grow for the A-STAR™ cabinets.
- Overall product performance is at 1.13x Coin In and 1.21x Net Win, with market share of 7.7% or 27,000 machines placed.
- Multi-Win™ brand games continue to dominate the dual screen cabinet.
- Xtension Link™ is the dominant product in the portrait cabinet in both link and stand alone.
- Xtension Link™ is in high demand in link progressive packages on both A743 and A755.



Key Market Highlights

Asia Pacific

- Grand Fortune™ continues to show solid performance and a consistent increase in install numbers 4+ months post release in NSW and QCOM markets. Performance has been boosted by the release of games 3 and 4 and will be further supported by the release of games 5 and 6 in coming months.
- Lucky Stars Deluxe™ has maintained consistent performance since its release in NSW and national install numbers will continue to increase as the game family rolls out across all QCOM markets.
- The initial introduction of the new A-STAR 100™ cabinet has been well received alongside the first viewings of the new Oriental Gongs™ game family. Both have been showcased to the wider market at AGE in August 2023.



Game Development Investments

Clear Product Strategy

- Continue on globalisation utilising key tentpole products – Treasure Spirits™, Cash Stacks Gold™, Ultra Shot™ and Grand Fortune™.
- Focus on leveraging High Denom content with new concepts and utilising key brands – Thunder Cash Classic™ and Dollar Streak Classic™.
- Refining product branding and consistency across worldwide gaming lines.
- Improving global product delivery and quality on product release.

Growth in R&D Pipelines

- Continuing investments on Next-Gen Game and Math engines, building on expanded field trials.
- Increased utilisation of external content and game development providers for cost-effective growth.
- Focused investment on hardware and cabinet design with attention on global markets and trends.

Future Investments

- Finalising next generation products showcasing at G2E 2023.
- Internal upgrades underway for better design tools and improved Sight, Sound and Action.
- Talent development initiatives and competitive recruitment to expand core strengths.



Treasure
Spirits
財宝鬼神

CASH
STACKS
GOLD

GRAND
FORTUNE

ULTRA
Shot

THUNDER
CASH
CLASSIC

DOLLAR
STREAK
CLASSIC



Online



B2B Real Money Gaming (RMG) & Social Casinos



Ainsworth Interactive is an online B2B Real Money Gaming (RMG) and social casino content supplier offering digital slot games in the iGaming industry.

Ainsworth Interactive is positioned as a major iGaming provider in Latin America and North America with over 135 games approved on the Ainsworth remote gaming server (RGS) platform.

We strategically promote these games by releasing them alongside our land-based business. Additionally, we offer these slot titles to our exclusive partners in RMG with Game Account Network (GAN) in the US (exclusivity with GAN terminates on 31st March 2024) and our social casino partner, Zynga, further expanding their availability and reach on the Hit it Rich™ social casino app.

Ainsworth Interactive expanded its presence into the Canadian online market early this year through a significant partnership with Loto-Québec and we are ranked in the top 5 online slot providers.

In H1, we established a new innovative gaming studio called Neon Line, dedicated to meeting the specific needs of online players and enhancing their gaming experiences on mobile devices. Neon Line will officially launch our initial range of Digital First games at G2E 2023 in Las Vegas.

B2B Real Money Gaming (RMG)



Conclusion

Conclusion

- Revenue improvements across Americas markets compared to pcp and prior half. AGT enters the calendar year 2023 with good momentum and expects to have continued growth in North America.
- Release of A-STAR 100™ with range of innovative product suites at AGE 2023 was well received and it is expected that sales in Australia will increase in 2H.
- AGT's North American business continues to make progress in Class II and HHR markets. Opportunities are continually being pursued in existing and new HHR markets, in particular Kentucky, New Hampshire and Wyoming.
- Continued focus in R&D investment with clear product strategy to drive sustained, long-term growth. Broadening of R&D team and third-party developers to deliver high quality innovative games and diversity in product offerings.





Ainsworth Game Technology

10 Holker St, Newington NSW

www.agtslots.com



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