



1H25 Investor Update

25 February 2025

Spacetalk Ltd (ASX:SPA)
Safety at every stage of life

spacetalk.co



Focused on growth



Spacetalk is on course to become a sustainably profitable business. We are evolving from a loss-making kids' wearables company into a cash generating, software driven, hardware – supported subscription platform, providing comprehensive family safety solutions.

Significant progress has been made during the first half of the year as we focus on international scaling and product development. Our approach is capital light via digital channels specifically Shopify and Amazon. This gives us the opportunity to expand rapidly and in a controlled manner.

We have an ambitious product development schedule in the coming quarters. The next generation of kids' and seniors' hardware is in development plus an entirely new software experience for our customers and users. Expect a significant upgrade in both user experience and bringing our ecosystem to life with unique product capabilities. These initiatives will drive subscriptions as we remain focused on delivering \$20–25m ARR in 2026.

My thanks to Pure Asset Management for supporting our growth and innovation agenda. The restructuring of the legacy debt is a big win for the business and shareholders and enables us to focus on driving the business forward.

I am confident we are putting ourselves in a good position to deliver returns for shareholders in the long term as we execute on our strategy.



Simon Crowther, CEO & MD

Joined February 2023

Simon is a serial entrepreneur and CEO with 20 years of commercial success rooted in the technology sector. Simon had his first profitable exit in 2000 which paved the way for increased leadership roles and exits in subsequent years.

Simon was CEO with AirMap, Managing Director with Yamaha Motor Ventures & Laboratory Silicon Valley and CEO of Nearmap (ASX:NEA) which he led as a public company and built into a leading geospatial and data analytics business.



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**1H25
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Financial Performance Highlights

1H25 results demonstrate continued growth

	1H24	1H25	Change	
Revenue from continuing operations (\$m)	9.2	10.3	12%	
Gross Profit from continuing operations (\$m)	4.2	5.2	24%	
GP margin (%)	46%	51%	5ppts	
Annual Recurring Revenue (\$m)	9.5	11.0	16%	
Paying Spacetalk Mobile Subscribers (higher ARPU than App)	26k	40k	53%	
EBITDA (\$m)	(2.7)	(0.1)	96%	

Business & Strategy Update

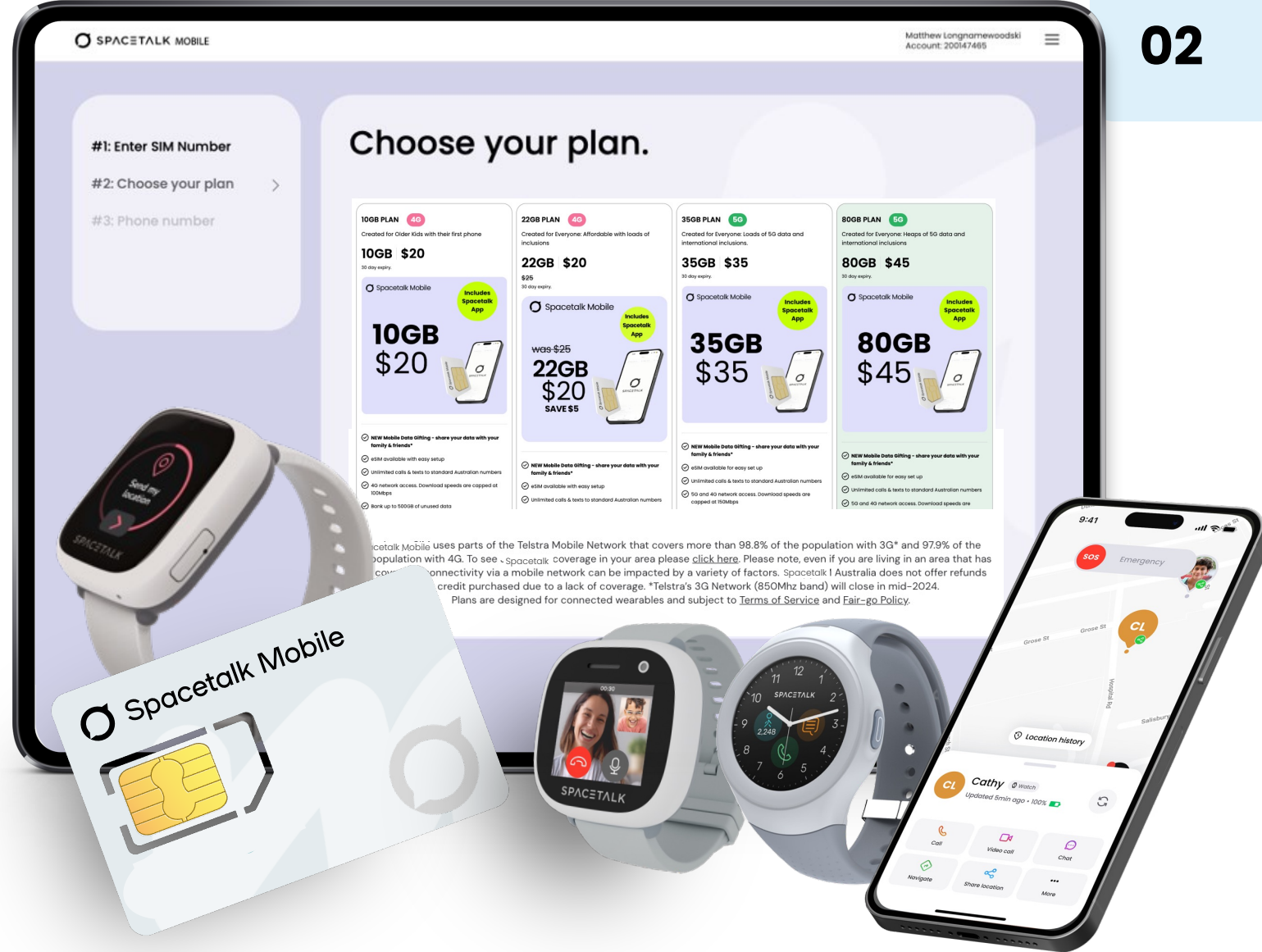
Spacetalk is a family safety technology business that develops and sells hardware and software products that address safety concerns at every stage of life

Spacetalk Mobile is a MVNO that sells mobile plans that connect our products and families.

Following a successful turnaround Spacetalk is focused on market expansion and new product development.

MVNO (Mobile Virtual Network Operator)

A selection of wearable device and family orientated mobile phone pre-paid plans. Spacetalk Mobile operates on the Telstra Wholesale Network in Australia and AT&T network in the USA.



Business & Strategy Update

Our immediate and medium-term growth and innovation strategy is anchored by vision and mission to deliver a safety ecosystem for families at every stage of life

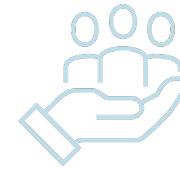
VISION

Safety at every stage of life.



MISSION

To ensure **family** safety by providing an **ecosystem** of products that enable **freedom** and create **peace of mind**.



Our unique approach

acquires whole families as customers.



Our unique ecosystem

provides safety for the entire family.

Spacetalk Product overview

Spacetalk's approach engages families early and is designed to retain them for life

Spacetalk **acquires families as customers earlier** than rivals, and creates **generational lifetime value**, from growing up to growing old.

Spacetalk App 1.5 is the first step in enabling **customer acquisition without hardware sales** and **extending customer lifetime value** beyond the use of wearable devices.

*Adventurer 2 only

Loop Wearable



Kids safety 4G phones in a wearable device. Features include video calling*, talk and text, GPS location awareness, school mode, no internet browsing or social media, emergency SOS, and tough Gorilla glass.

Adventurer 2 Wearable



Life MPERS Wearable



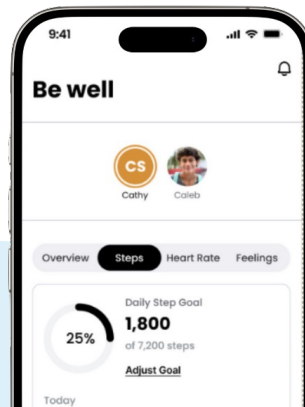
Seniors and workers 4G mobile personal emergency response system (MPERS) wearable that automatically detect falls, connects to 24/7 monitoring providers, calls SOS contacts, provides GPS location data and allows talk and text.

Spacetalk Mobile



Spacetalk Mobile is a Virtual Network Operator (MVNO) that operates on the Telstra Network and delivers a range of wearable device and family orientated mobile phone pre-paid plans that connect Spacetalk wearable devices, and mobile phones for the whole family.

Spacetalk App



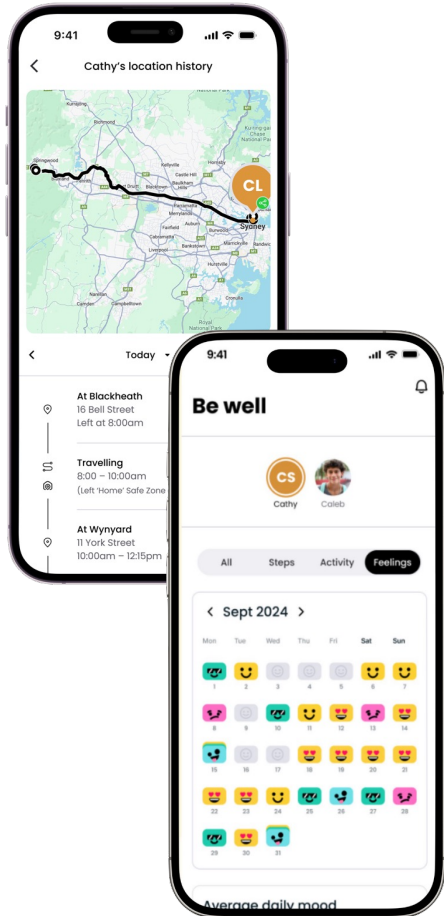
The Spacetalk App 1.5 connects family smart phones or Spacetalk wearable devices, enabling customers to locate family members, and communicate with them at any time.

Safety features include restricting who can contact kids on their wearables devices and setting emergency call lists for SOS alerts.

Developing Spacetalk App 2.0 will further enable customer acquisition without reliance on hardware and extend customer lifetime value beyond use of wearable devices.

Spacetalk App 1.5

Spacetalk App has been downloaded over 500,000 times and scores 4.6 out of 5 stars from 3,200+ ratings.



At the centre of the product ecosystem our app is the heart of the Spacetalk customer experience.

Parents

use the app to connect to Spacetalk wearable devices, enabling users to locate family members and communicate with them at any time.

Seniors Family Members

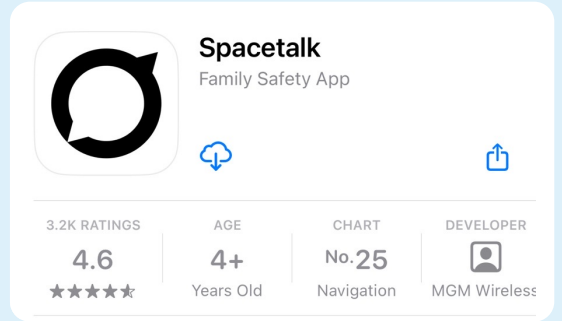
use the app with adult privacy settings to passively monitor wellbeing and receive SOS alerts.

Seamless Integration

Any mobile phone can connect providing seamless integration for the whole family, young and old.

Features

- ✓ Location awareness
- ✓ HD Video and voice calling
- ✓ Secure messaging
- ✓ Navigate to family members
- ✓ Safe zones and alerts
- ✓ Wearable SOS notifications
- ✓ In App SOS function
- ✓ Emergency and approved contacts
- ✓ Health and wellbeing



Consistently High Apple App Store Rating

Ratings & Reviews >

4.6

★★★★★
3.2K Ratings

Most Helpful Reviews

Great product

★★★★★ 1y ago · Amandahilton

Bought this for my 11 year old. I like how we can track him and he can call/text us. He thinks it is a little chunky for his wrist, but otherwise enjoying the ability to be able to communicate with family and friends when out and about. It's a great first step before a phone. App and phone are easy to...

From transformation to growth

We have successfully reset and refocused the business and are now ramping up and scaling

February 2023



Spacetalk was a consumer electronics hardware business

July 2023



Spacetalk is a wearables enabled software subscription and Mobile Virtual Network Operator (MVNO) business

August 2024



Spacetalk is focused on market development and geographical growth

Reset

Refocus

Ramp Up

On track to deliver

\$20m-\$25m* ARR business in 2026 *Excludes device sales



We are now executing our FY25 growth strategy

We continue to execute and achieve significant milestones while operating a very lean business.

Our growth strategy includes scaling our core business through capital light geographical market expansion with existing products, and the development of new products for existing markets.

New technology infrastructure and Spacetalk App v2.0 will underpin growth in CLTV and enable scale without reliance on hardware.

Seniors' predictive analytics product innovation will use existing resources and capabilities to drive market development and future global growth in a valuable new sector.

Q2FY25



- ✓ Seniors' predictive analytics POC complete to TRL4.
- ✓ Ecommerce soft relaunch of US and UK markets.
- ✓ Spacetalk App 1.5 launched as interim update.

2H25



- ✓ Ecommerce led geographical market expansion, with the objectives of selling in 11 countries by EOFY25.
- ✓ Spacetalk Mobile international expansion starting with the UK⁼

1H26



- ✓ New kids' & seniors' hardware, including N.Am variants[#]
- ✓ Spacetalk 2.0 new tech stack and v2.0 of Spacetalk App live[#]
- ✓ Seniors' predictive analytics software MVP launch[#]

Ramp Up

Scale

⁼MNO or MVNE partnership dependent

New Releases

[#]In development

On track to deliver

\$20m–\$25m* ARR business in 2026 ^{*}Excludes device sales


We are now executing our FY25 growth strategy focused on maximising revenue and customer lifetime value

Product

Progress

- › **Complete:** Gain certification for Loop and Adventurer 2 devices in new regions.
- › **Complete:** Develop and scale new standalone Spacetalk App v1.5 to enable customers to continue to use Spacetalk products as kids 'age out' of Spacetalk devices.

NB: App v1.5 is an interim update that is limited in functionality by legacy technology infrastructure.

App 2.0 will be built on a new tech stack which will enable significantly richer features and enhanced customer experience.

- › **POC Complete:** Develop first interactive AI product.

Ongoing

- › **Underway (Q1FY26):** Rebuild product and data technology architecture (Spacetalk 2.0).
- › **Underway (Q1FY26):** Develop and scale new Spacetalk App (v2.0) on new architecture.
- › **Underway (Q4FY25):** Develop US compatible kids' wearable device.
- › **Underway (Q2FY26):** Development of next generation kids' wearable device.
- › **Underway (Q2FY26):** Develop first AI predictive analytics product for seniors' welfare (**POC Complete**).
- › **Underway (Q3FY26):** Begin development for next generation seniors' wearable device.

Growth

Progress

- › **Complete:** Launch reconditioned handset / Spacetalk Mobile bundles.
- › **Complete:** App pricing review and reset.

Growth Enablement

- › **Underway (Q3FY25):** Rebuild or replace central technology systems (e.g. Cin7; ++).
- › **Underway (Q3FY25):** Reset Amazon webstores globally.
- › **Underway (Q3FY25):** Reset Shopify webstores globally.
- › **Underway:** Scale Australian seniors' sales via channel partner.
- › **Underway:** Drive ecosystem sales through to acquire 'Families with four products' and maximise CLTV.

Selling in 11 Countries By EOFY25

- › **Underway (Q4FY25):** Phased UK market re-entry and European ecommerce led market entry: Germany; Sweden; Republic of Ireland; Netherlands; France; Spain.
- › **Underway (Q4FY25):** First Asia ecommerce led market entry: Singapore.
- › **Underway (Q4FY25):** North America ecommerce led market re-entry into Canada; Reset of US ecommerce sales channels.
- › **Underway:** Scale Spacetalk Mobile US.
- › **Next (Q4FY25):** Spacetalk Mobile launch in UK[#]
- › **Next (Q1FY26):** Spacetalk Mobile launch in NZ[#]
- › **Next (Q2FY26):** Spacetalk Mobile launch in Germany[#]
- › **Next (Q2FY26):** Spacetalk Mobile launch in Sweden[#]
- › MNO or MVNE partnership dependent[#]

(Estimated Delivery Dates)

1H25 Financial Results Summary

Spacetalk Snapshot

03

1H25
Revenue

\$10.3M

1H24
\$9.2M

1H25
Gross Profit

\$5.2M

1H24
\$4.2M

1H25
Gross Margin

51%

1H24
46%

1H25
EBITDA

(\$0.1M)

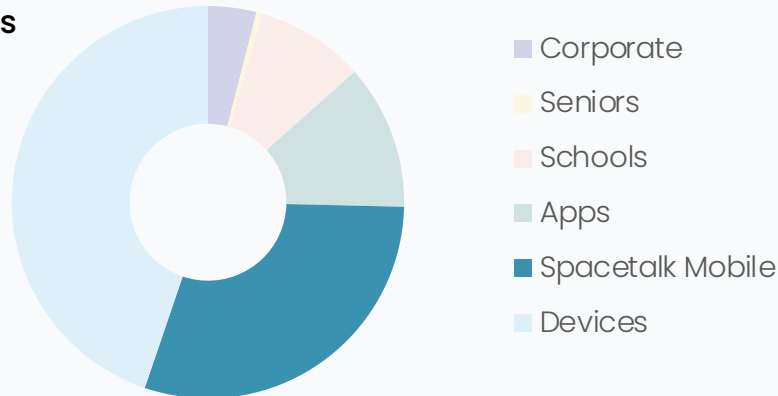
1H24
\$(2.7M)

Paying Mobile
subscribers

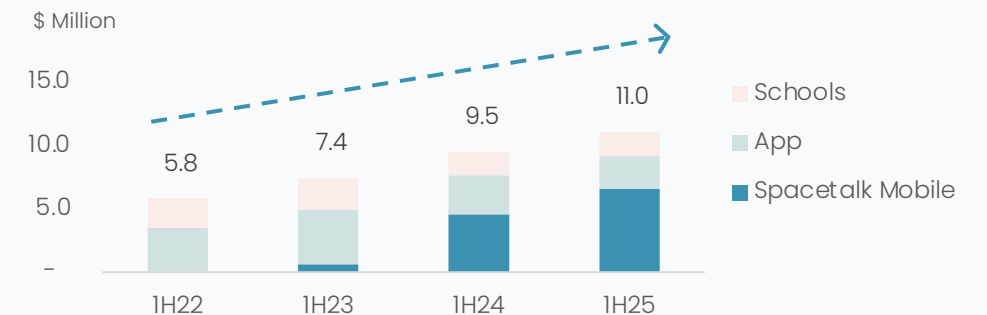
#40k

1H24
#26k

Revenue By Segments



ARR Growth



Highlights: Profit and Loss

Moving towards sustainable profitability

Income Statement (\$M)	1H24	1H25	Change	
Revenue from continuing operations	9.2	10.3	12%	↗
Gross Profit from continuing operations	4.2	5.2	24%	↗
Net expense from continuing operations	(6.9)	(5.4)	-23%	↗
EBITDA	(2.7)	(0.1)	-96%	↗
Discontinued operations	(0.6)	(0.05)	-92%	↗
Loss after income tax attribute to the owners of Spacetalk	(4.0)	(1.0)	-74%	↗

Revenue from Continuing Operations

- Revenue grew 12% from \$9.2M to \$10.3M, driven by mobile growth. Paying mobile subscribers rose from 26K to 40K, strengthening recurring revenue and margins.

Gross Profit

- Gross profit increased 24% from \$4.2M to \$5.2M, supported by higher-margin mobile revenue, with mobile gross profit rising from \$1.2M in 1H23 to \$1.6M in 1H24.

Net Operating Expense

- Reduced 23% from \$6.9M in 1H23 to \$5.4M in 1H24, reflecting cost optimisation, automation, and lower people costs.

Discontinued Operations

- Losses fell 92% from \$0.6M to \$0.1M in 1H24. This overhang is ending, allowing a full focus on core, profitable mobile services.

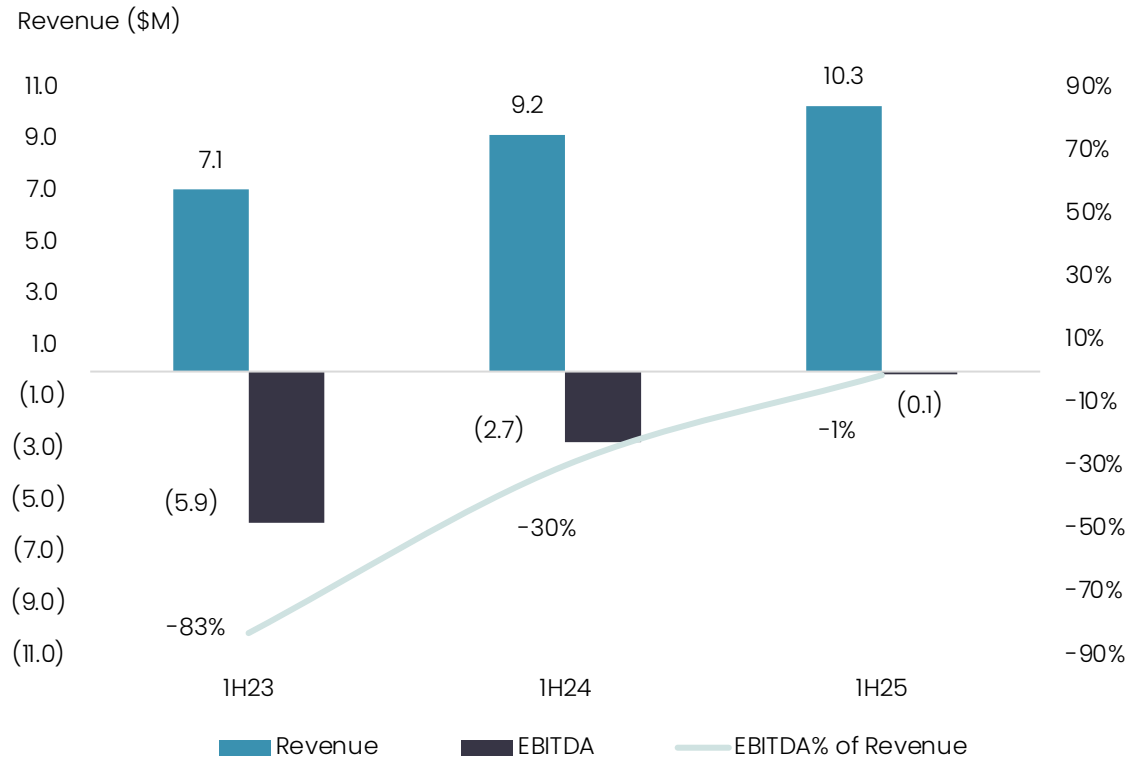
EBITDA Progress

- EBITDA improved from (\$2.7M) to (\$0.1M), a 96% turnaround. This reflects higher recurring revenue, automation-driven efficiencies, and disciplined cost management.

Progressing Towards Profitability

Building a stronger, more efficient business

EBITDA% of Revenue



Revenue

- Strong recurring revenue growth in mobile, driving sustained user and revenue expansion.
- Revenue grew from \$9.2M in 1H23 to \$10.3M in 1H24, with mobile subscribers increasing from 26K to 40K, boosting higher-margin revenue.
- Higher quality subscription revenue improving financial performance.

Cost Management

- Focused rightsizing to enhance efficiency.
- Continued cost optimisation and process improvements for sustainable gains.

EBITDA

- Turnaround progress with EBITDA losses narrowing from (\$2.7M) in 1H24 to (\$0.1M) in 1H25, a 96% improvement.
- Driven by higher mobile revenue, quality subscriptions, and disciplined cost management.
- Operational efficiencies and sustainable growth remain a key focus.

Half-on-Half Analysis

- EBITDA as a percentage of revenue improved from -106% in 1H23 to -1% in 1H25.
- The foundation for long-term growth is taking shape, with initial signs visible.

Highlights: Cash Flow

Turning the Tide: Cash flow improvement

Summary Cash Flow Statement (\$M)	1H24	1H25	Change	
Receipts from customers	9.8	8.0	-19%	⬇️
Cash paid to suppliers and employees	(11.8)	(9.3)	-22%	⬆️
Net cash used in operating activities	(2.2)	(1.7)	-25%	⬆️
Purchase of intangible assets	(0.9)	(0.7)	-31%	⬆️
Cash used in investing activities	(1.0)	(0.7)	-32%	⬆️
Cash flow before financing activities	(3.2)	(2.3)	-28%	⬆️
Cash flow from financing activities	3.1	3.0	-4%	⬆️
Net (decrease) increase in cash & cash equivalents	(0.1)	(0.6)	-558%	⬆️
Cash & cash equivalents at year end	2.9	2.4	-16%	⬇️

Receipts from Customers

- Declined 19% from \$9.8M in 1H24 to \$8.0M in 1H25, reflecting the sell-down of older Adventurer watches at a discount and the closure of non-profitable operations
- Prior year included pipeline fills from the Loop watch launch, impacting the comparison.

Net Cash from Operations Before Inventory

- Improved 99% from \$0.6M to \$1.2M, driven by cost management, strategic outsourcing, and operating efficiencies.

Net Cash Used in Operating Activities

- Reduced 25% from \$2.2M to \$1.7M, as non-revenue-driven costs were removed, strengthening the foundation through automation, outsourcing, and headcount adjustments.

Investing Activities

- Invested \$0.7M in growth projects, including Spacetalk v1.5 app—the first step toward a full-fledged v2.0 app and enhanced digital experience.

Financing & Cash Balance

- Raised \$3.0M net of fees, strengthening the balance sheet and bringing cash at period end to \$2.4M.

Highlights: Balance Sheet

Successful refinancing and extending borrowing

Balance Sheet Items (\$M)	30 Jun 24	31 Dec 24
Cash & cash equivalents	1.8	2.4
Inventory	1.5	2.2
Trade and other receivables	1.1	3.4
Intangible assets	2.2	2.3
All other assets	1.3	1.5
Total Assets	7.9	11.8
Trade and other payables	2.8	3.7
Borrowings	5.0	5.0
All other liabilities	3.9	5.2
Total liabilities	11.7	13.8
Net (liability) / Asset	(3.9)	(2.1)

Inventory Management

→ Inventory increased 44% from \$1.5M to \$2.2M due to securing end-of-life components for future manufacturing, strengthening the supply chain.

Receivables & Cash Flow

→ Receivables rose from \$1.1M to \$3.4M, driven by strong December and Black Friday sales. Trade receivables are within terms.

Investment in Growth

→ Intangible assets increased from \$2.2M to \$2.3M, reflecting ongoing investment in technology and IP.

Borrowings

→ On 24 February 2025, after Balance sheet date, Spacetalk successfully renegotiated its \$5M loan facility, reducing near-term repayment obligations and freeing up \$0.75M in the next 12 months to support growth initiatives.

Liquidity & Liabilities

→ Cash improved from \$1.8M to \$2.4M, supported by an equity raise. The rise in liabilities from \$3.9M to \$5.2M is mainly due to unearned revenue from 12-month contracts, with cash recognised over time.

Spacetalk – Revenue and gross profit summary

Gross profit increased by 24% year-on-year

(\$'000)	1H24		1H25		PCP Change	
	Revenue	Gross Profit	Revenue	Gross Profit	Revenue	Gross Profit
Devices	4,710	1,041	4,613	1,369	(2%)	32%
Mobile	1,881	1,154	3,040	1,625	62%	41%
Apps	1,618	1,123	1,220	865	(25%)	(23%)
Schools	908	845	918	877	1%	4%
Seniors	40	23	53	50	33%	117%
Corporate	25	25	455	455	1,720%	1,720%
Total	9,182	4,211	10,299	5,241	12%	24%

Revenue Growth

- Overall revenue increased 12% from \$9.2M in 1H24 to \$10.3M in 1H25, driven by strong mobile and device sales.

Mobile Revenue Increase

- Mobile revenue grew 62% from \$1.9M in 1H24 to \$3.0M in 1H25, driven by a growing user base. The model is sustainable and scalable globally.

Improved Gross Profit

- Gross profit increased 24% from \$4.2M in 1H24 to \$5.2M in 1H25, supported by high-margin mobile and recurring revenue streams.

Revenue Mix Evolution

- Kids devices remain the traditional entry point, with strong margins. However, the true value emerges when customers are in the Spacetalk ecosystem, using mobile plans, seniors' devices, and the Spacetalk App. Each user has multiple touchpoints, increasing lifetime value over time.

Device Revenue

Device gross profit up 31%

('000)	1H24	1H25	%
Device sales (#)	29.9	28.0	(6%)
Device revenue (\$)	4,710	4,613	(2%)
Device Gross profit (\$)	1,041	1,369	31%
Gross profit %	22%	30%	

Device Sales

- Sales declined slightly from 29.9k to 28.0k units, in line with expectations. Last year, Loop was launched for the first time, leading to pipeline fills as retailers stocked new inventory.
- Legacy stock, including Adventurer, was mostly cleared in the prior year at low margin, reducing its impact on current sales.
- This year, sales were primarily driven by sell-through and reordering patterns rather than initial pipeline fills, with sustainably healthier margins.

Device Revenue

- Revenue remained stable, declining slightly by 2% from \$4.7M to \$4.6M, as expected given the shift from pipeline fills to ongoing reordering cycles.

Gross Profit & Margin

- Gross profit increased 31% from \$1.0M to \$1.4M, with margins improving from 22% to 30%. The margin increase reflects a more sustainable business model, as older stock clearance is completed, and the company moves toward higher-margin, more predictable sales patterns.

Mobile Revenue

Strong subscriber growth and revenue expansion for Spacetalk Mobile

('000)	1H24	1H25	%
Paying mobile subscribers #	26	40	54%
Mobile revenue (\$)	1,881	3,040	62%
Mobile gross profit (\$)	1,154	1,625	41%
Gross profit (%)	61%	53%	

Subscriber Growth

- Paying subscribers grew 54% from 26k to 40k, driven by the strategic shift to Spacetalk Mobile. The Spacetalk App is free for Spacetalk Mobile users, increasing adoption and retention.

Revenue Growth

- Mobile revenue rose 62% from \$1.9M to \$3.0M, with higher ARPU and gross profit than the app, reinforcing a strong recurring revenue model.

Gross Profit Margin

- Gross profit grew 41% from \$1.2M to \$1.6M, with margins at 53%, reflecting scalable mobile services.

Lifetime Value Expansion

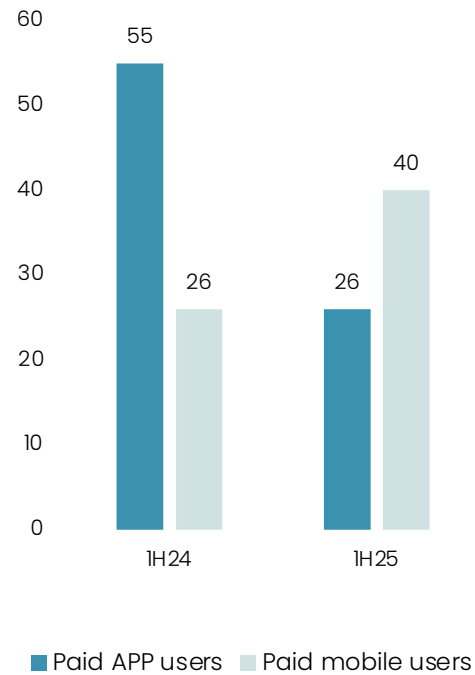
- Spacetalk Mobile complements watch, mobile, and app, increasing retention. While the Spacetalk App is free for Spacetalk Mobile users, we are exploring future monetisation strategies.

Mobile Drives Higher Profitability

Enhancing customer value and ecosystem integration

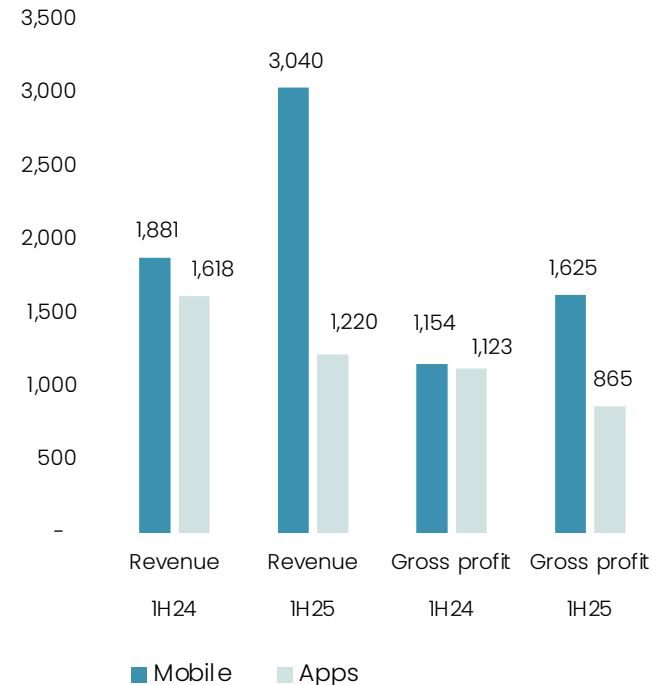
Paying users

#'000



Revenue & Gross profit

\$'000



Spacetalk Mobile & App

- Mobile revenue increased by 62% (\$1.9M in 1H24 to \$3.0M in 1H25), reinforcing its higher value per user. App revenue declined from \$1.6M to \$1.2M as more users accessed the app for free by having a mobile subscription.
- Gross profit increased significantly for mobile users (\$1.2M to \$1.6M), reinforcing higher margins and stronger economics.
- The strategic shift towards mobile boosts overall profitability, as free app access for mobile users increases long-term engagement and retention.
- Future upside: While the app is currently free for mobile users, monetisation opportunities will exist with the release of Spacetalk App v2.0.

App Revenue – Strong Margins Despite Shift to Mobile Subscriptions

App remains a core part of the user experience, with increasing engagement through mobile plans.

('000)	1H24	1H25	%
Paying App Users (#)	55	26	(52%)
App revenue (\$)	1,618	1,220	(25%)
App gross profit (\$)	1,123	865	(23%)
Gross profit (%)	69%	71%	

App Usage Remains Strong

- Since the launch of App 1.5 in 4Q25, the average time spent on the app has increased.

Shift to Mobile – Higher Revenue & Retention

- Paying app users declined 52% as more users were migrated to mobile plans, which include free app access. This transition aligns with our strategy to increase lifetime value and strengthen recurring revenue.

Future Monetisation Opportunities

- A large non-paying app user base remains an opportunity for future monetisation through expanded features and premium services.

High Gross Profitability Maintained

- Despite a revenue shift, gross profit margins improved from 69% in 1H24 to 71% in 1H25, reinforcing the app's strong unit economics even as its role in the ecosystem evolves.

School Revenue

Higher engagement drives margin growth despite declining school base

	1H24	1H25	%
Schools (#)	1,106	1,018	(8%)
(‘000)			
School revenue (\$)	908	918	1%
School gross profit (\$)	845	877	4%
Gross profit (%)	93%	96%	

School Participation

- The number of schools using Spacetalk services declined by 8% from 1,106 to 1,018, but the rate of decline has slowed compared to prior years. While we expect a decline over time, we continue to monitor trends closely.

Revenue Growth

- Despite a challenging market with statewide adoption of new school and student management platforms, that integrate attendance monitoring and messaging, revenue still grew by 1% from \$0.91M to \$0.92M. This growth was driven by higher usage per school rather than pricing changes. Increased SMS sales and greater engagement contributed to overall growth.

Gross Profit Margin

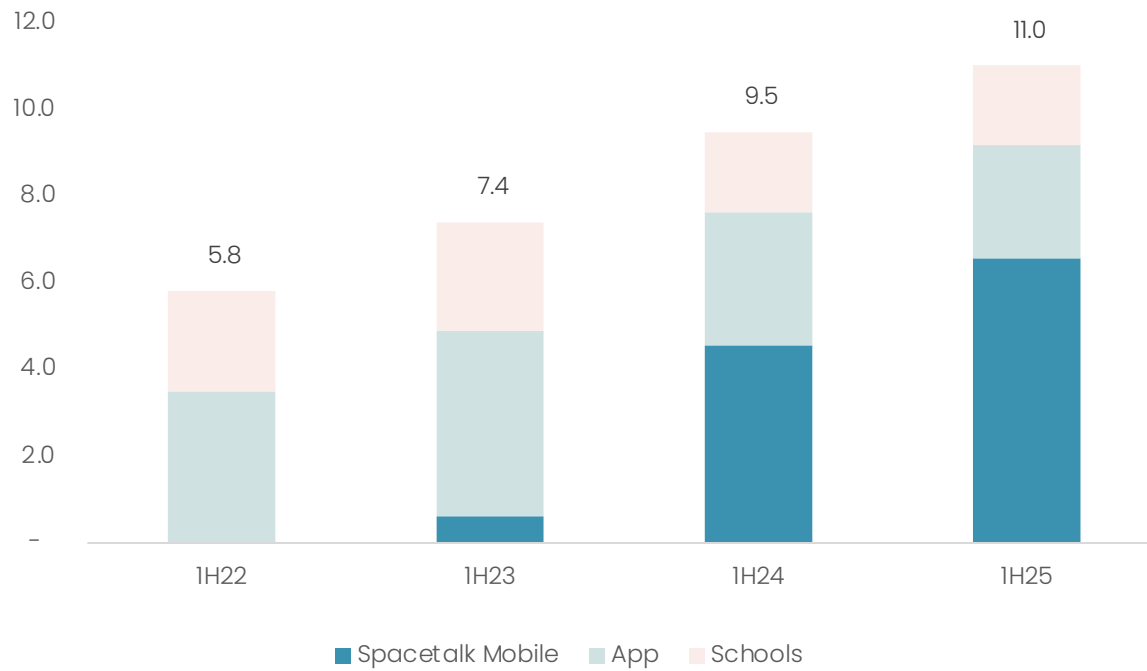
- Gross profit rose 4% from \$0.85M to \$0.88M, with margins improving from 93% to 96%. This reflects higher usage per school, which is driving stronger profitability, even as external market pressures increase.

Spacetalk – Growing Recurring Revenue

Focus on building a sustainable & predictable revenue base

ARR Growth

(\$M)



App Subscriptions – Strengthening Financial Stability \$2.6M

- Increased engagement & functionality drive usage growth.
- Price adjusted from \$5.99 to \$7.99/month, further supporting long-term stability.

Expansion in Mobile Subscriptions \$6.6M

- Higher ARPU & customer lifetime value, plus opportunities to expand beyond watch-based products.

School Revenue \$1.8M

- Recurring SMS & licensing revenue adds stability & resilience to overall revenue streams.

Scaling Recurring Revenue & ARR Growth

- ARR rose from \$5.8M in 1H22 to \$11.0M in 1H25, reflecting effective execution of a subscription-first strategy.

Debt Facility Comparison: Before and After Refinancing

Debt Facility at 31 Dec '24

\$5M **9.5%**

Loan amount Interest rate stability

Loan Classification Adjustments & Amortisation Schedule:

\$1.75M classified as a current liability
\$3.25M classified as a non-current liability

Repayment Schedule

Mar 2025	\$1.0M
Sep 2025	\$0.75M
Mar 2026	\$1.0M
Mar 27	\$2.25M

Covenants

Minimum Cash Balance
Required to maintain at least \$0.75M at all times

EBITDA Covenant
Specific quarterly targets effective from 31 March 2025

New Debt Facility from Feb'25

\$5M **9.5%**

Loan amount Rate remains unchanged, maintaining cost predictability

Loan Classification Adjustments & Amortisation Schedule:

\$1.0M classified as a current liability
\$4.0M classified as a non-current liability

Revised Repayment Schedule

Mar 2025 – Feb 2026	\$0.100M / per month
Mar 26 – Mar 27	\$0.125M / per month
Mar 2027	Final payment of outstanding capital

Covenants

Minimum Cash Balance
Required to maintain at least \$0.75M at all times

EBITDA Covenant
Specific quarterly targets effective from 30 June 2025

Supports Growth Initiatives

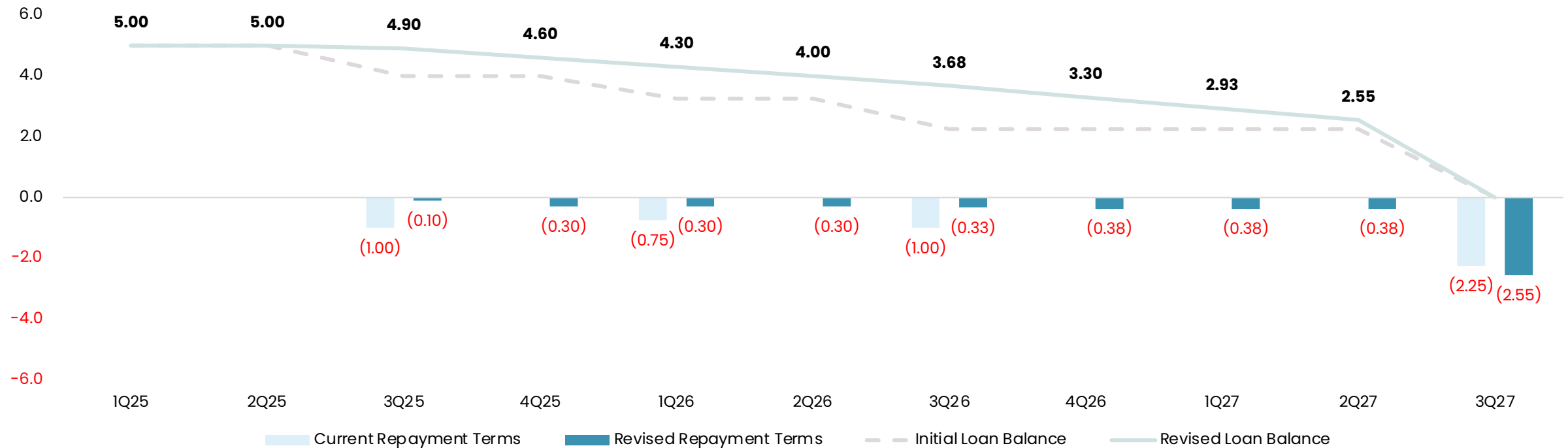
→ Effectively freeing up \$0.75M in liquidity over 12 months.

New Debt Facility – Strengthening Financial Flexibility

Revised repayment terms provide stability and support growth

Revised Loan Facility Repayments

(\$M)



Important legal information

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