

AUSTRALIA & NEW ZEALAND OVERVIEW

MARKET COMPLEXITY

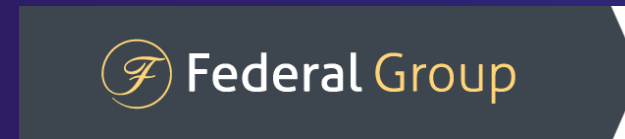
- 15 Markets (Australia & New Zealand)
- 3 Protocols (with variations for each market or jurisdiction)
- 10 Regulators
- ANZ National Standards
- Game Design Rules differ in each jurisdiction
- Different markets & player characteristics
- Operator strategies & venue differentiation
- Regional business objectives & opportunities
- Different release times for each market

MARKET OVERVIEW



JURISDICTION	EGM'S
NSW/ACT	96,530
QLD	44,338
VIC	29,197
NT	4,198
TAS	3,581
SA	13,507
WA	2,600
NZ	17,800
Total	210,251

BIGGEST OPERATORS IN AUS



Make up ~ 25% of the Australian Market



MARKETS: AUSTRALIAN



- Capped Max Prizes
- Prefer more “gambler” focused games
- Jackpot dominant
- More stringent regulations
- Players less receptive to really ‘out there’ concepts



SIGNAGE !!



MARKETS: US

- Australian style games Work
- Less restrictive regulations
- No ‘Max Win’ capping
- Players like “Portrait” or “Vertical” style cabinets
- US also loves licensed games



MARKETS: ASIA

- Love Links
- Big Signage
- Choice within games (5 Dragons)
- Spans across numerous countries
Mainly Macau, Singapore,
Philippines and Vietnam

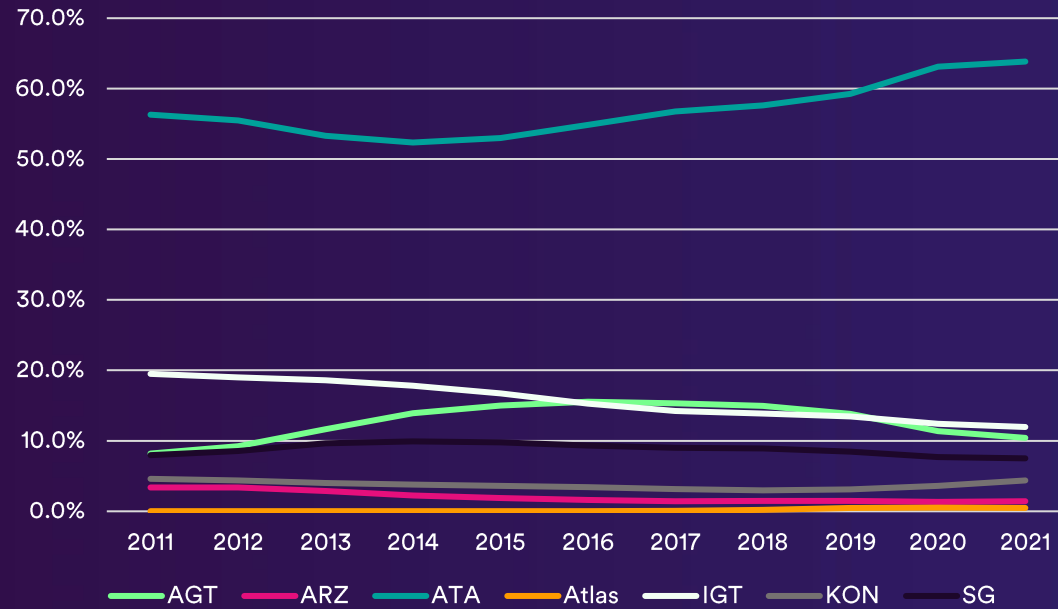


MARKETS: AUSTRALIAN

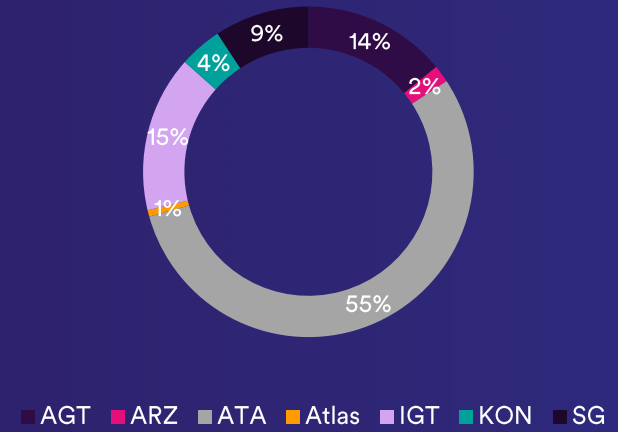
- ANZ markets is a REPEAT CUSTOMER/ LOCAL market.
- Smaller but more venues compared to US & Asia. Mostly near housing and suburbs.
- Most gaming is based around social events, going for a drink, dinner, quick unwind.
- This is unlike most parts of US or Asia where gaming is based on trips or getaways.

MANUFACTURERS

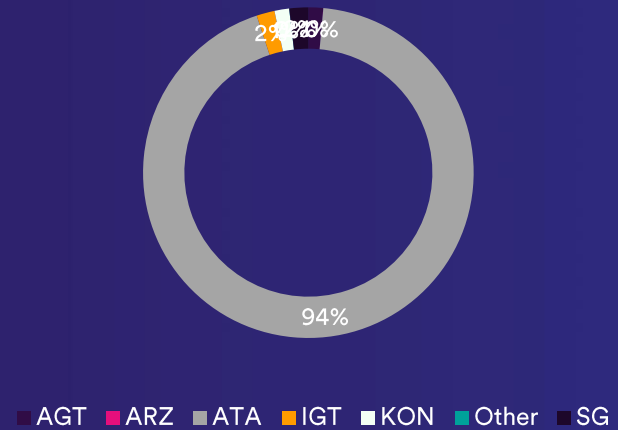
NSW % OF MARKET



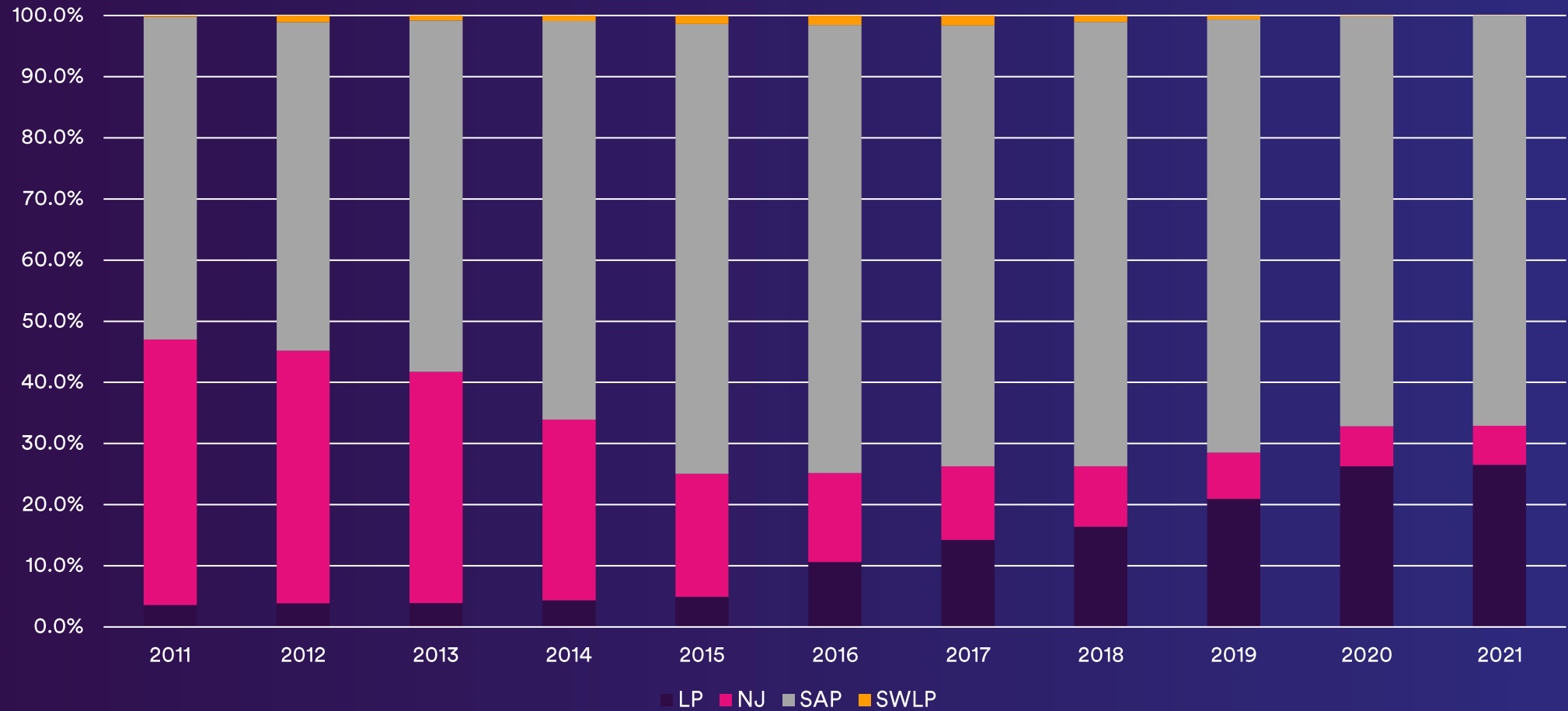
NSW CLUBS



NSW HOTELS



JACKPOT BREAKDOWN NSW



POPULAR GAMES IN AUS

MOST EGM's BY GAME FAMILIES

RANKING	GAME FAMILY	MANUFACTURER
1st	Dragon Link	ARISTOCRAT
2nd	Lightning Link	ARISTOCRAT
3rd	Players Choice	ARISTOCRAT
4th	Dragon Cash	ARISTOCRAT
5th	Lightning Cash	ARISTOCRAT
6th	Choys Kingdom	ARISTOCRAT
7th	Multistar	IGT
8th	All Aboard	KONAMI
9th	5 Dragons	ARISTOCRAT
10th	Lock It Link	SCIENTIFIC GAMES

MOST EGM's IN 2021

RANKING	GAME FAMILY	MANUFACTURER
1st	Choy's Kingdom	ARISTOCRAT
2nd	Kraken Unleashed	SCIENTIFIC
3rd	Dollar Storm Link Link	ARISTOCRAT
4th	Dollar Storm Link Ca\$h	ARISTOCRAT
5th	Go For Grand	IGT
6th	Fortune Lines	IGT
7th	Bull Rush	KONAMI
8th	Dollar Storm Ca\$h Ca\$h	ARISTOCRAT
9th	Players Paradise Grand	AINSWORTH
10th	All Aboard	KONAMI

GAME TIME !!
WHAT IS THE COMMON MECHANIC ?



HOLD AND SPIN !!

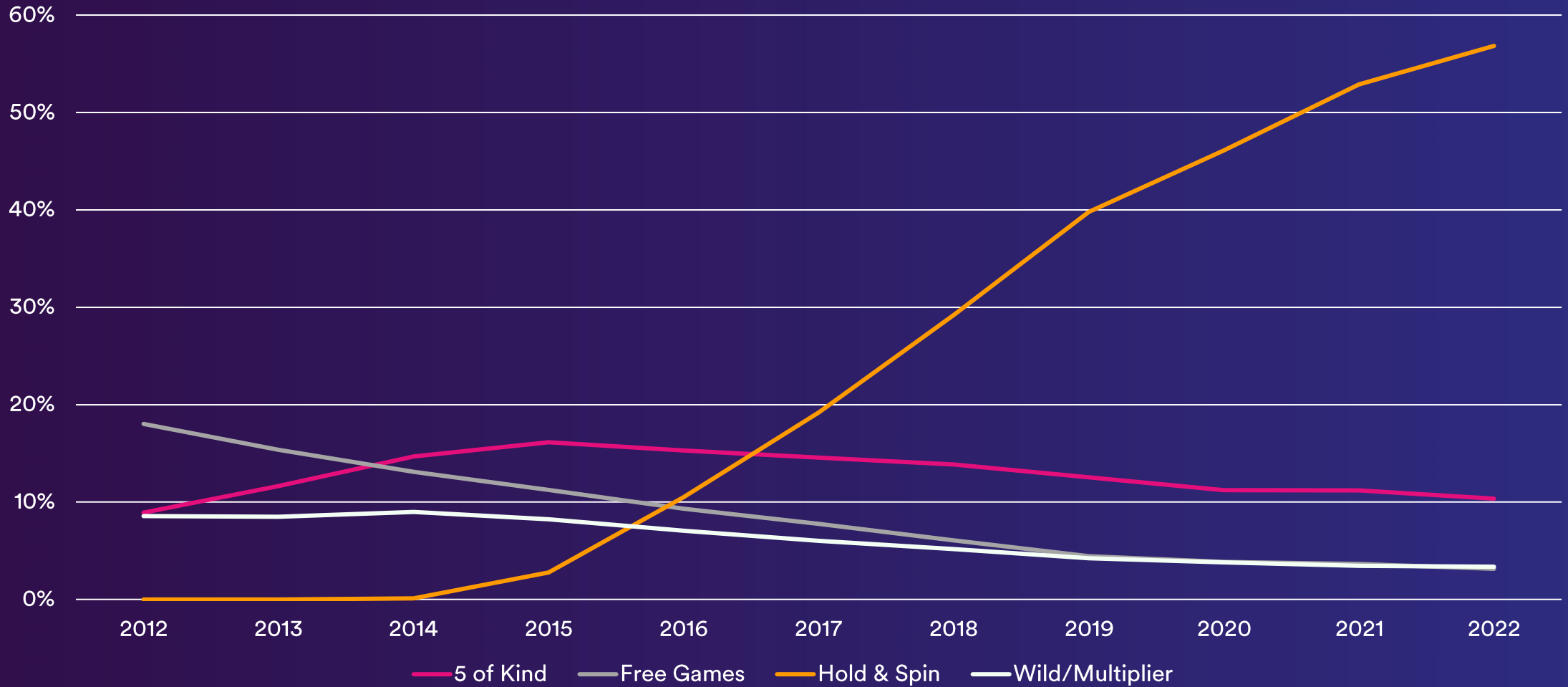


HOLD AND SPIN

- Triggered by 6 symbols instead of 3
- Cash on Reels to trigger a feature
- 3,2,1 spins then reset
- Incl original free games features previously mentioned
- Fill 15 win the grand



AUSTRALIAN GAME FEATURES



UPCOMING TRENDS

Persistence

- Symbols will stay on the screen beyond 1 spin
- Kraken Unleashed
- Fat Fortunes

Metamorphic Graphics

- Images grow to different states





A DECADE IN HISTORY

HISTORY (PAST 10 YEARS)



PRE LIGHTNING

LIGHTNING

POST LIGHTNING

PRE LIGHTNING

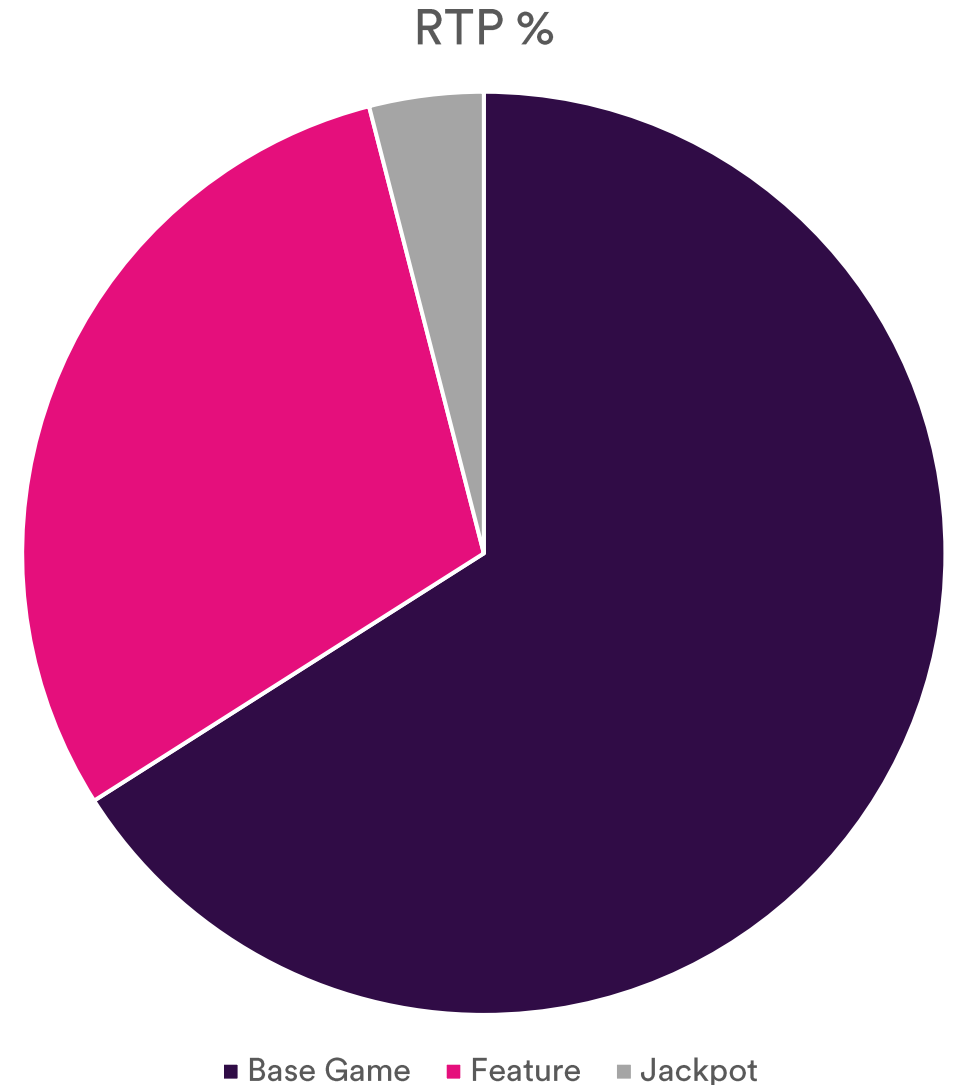
Lines: 15 – 25 lines

Jackpot: SAP or None

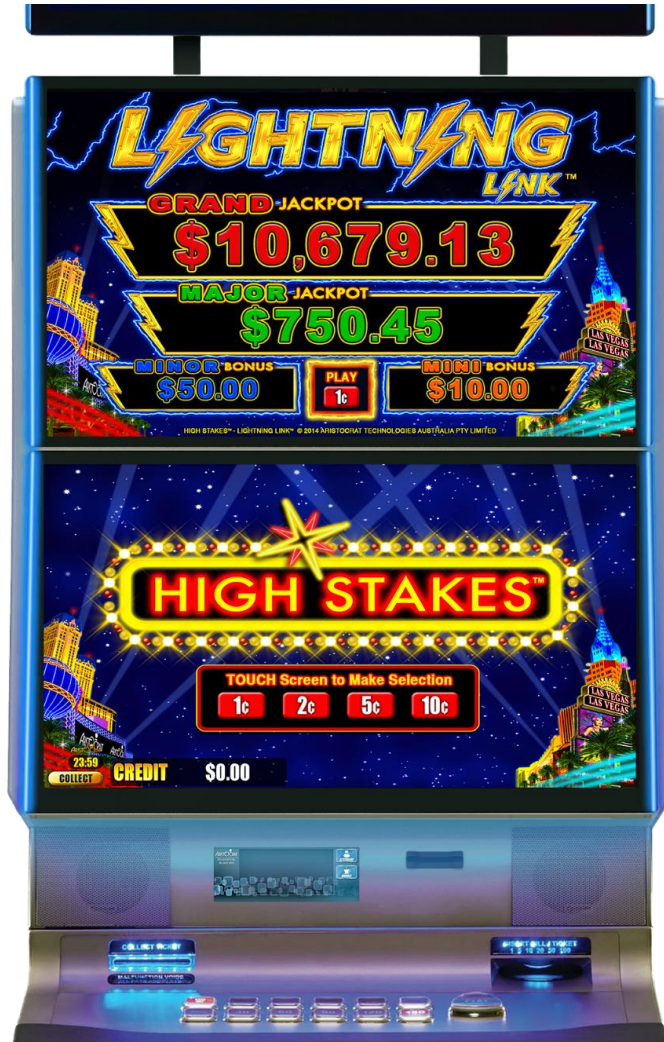
RTP: 88 – 90%

Feature Hit Rates: 120 – 130 games

Significant wins came from feature
and also from 5 of a kind wins



LIGHTNING LINK/CASH



- Jackpot Configuration's
- Several Start up options for a link value
 - \$500 Major that has a high frequency of triggering
 - 2 SCALABLE BONUSES



- RTP
- Increased RTP compared to other games at the time




- Multi Denomination
- 1c, 2c, 5c and 10c

POST LIGHTNING

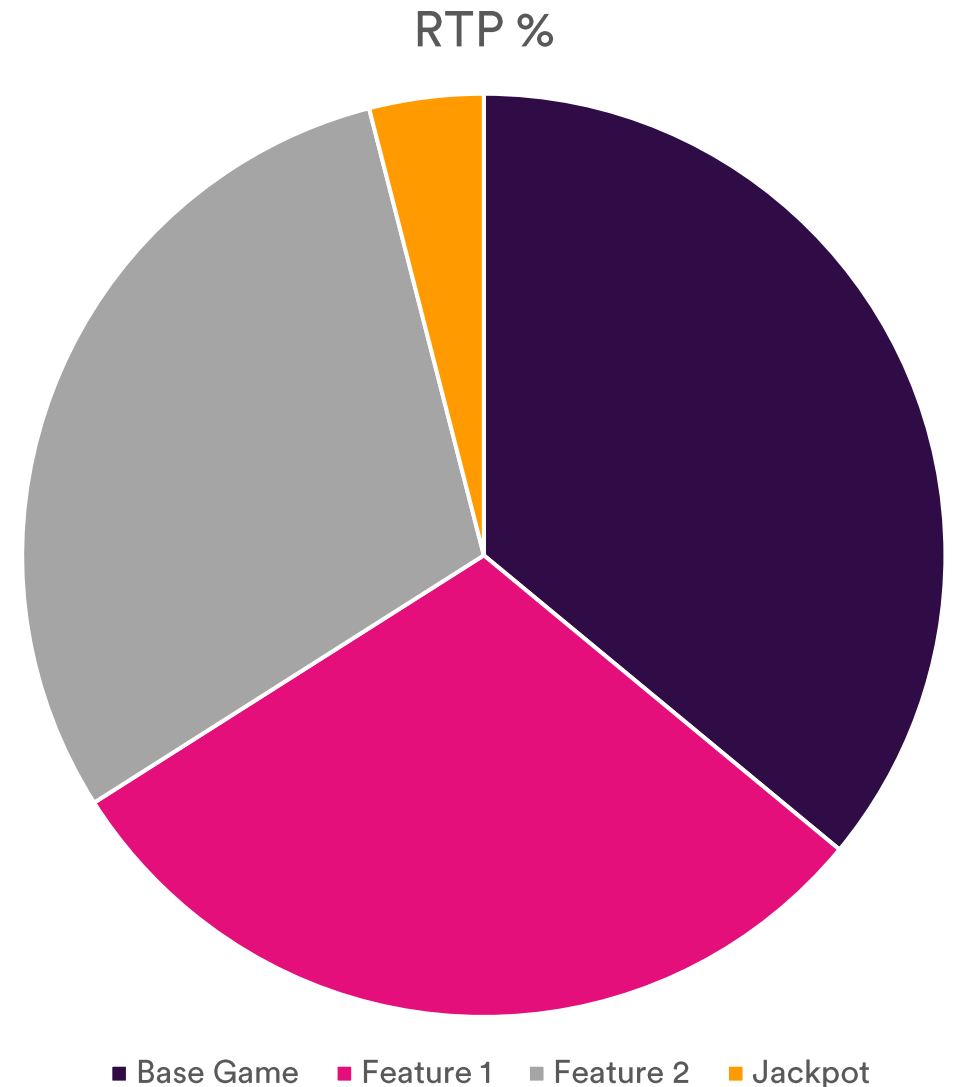
Lines: 50 lines 

Jackpot: LINK or SAP

RTP: 90 - 93% 

Feature Hit Rates: 60 - 70 games 

Significant wins came from features only
(Pretty Much)





SEGMENT	FY21 BACK CATALOGUE	Mars X	HELI X	HELI X+	HELI X ^{XT}	PURPOSE
HOLD AND SPIN	Dragon Link/Cash Choy's Kingdom Dollar Storm	Dollar Storm Scorchin' Fortune Cash Express LL Midnight Express Choy's Kingdom 5-6 Ultra Charge	Midnight Express Choy's Kingdom 5-6 Ultra Charge			<ul style="list-style-type: none"> • 50% of Aus market is H&S and the best performing segment • Pioneer in the segment to transform Hold and Spin for a better player experience
PROVEN MECHANICS & BRANDS	Grand Star Cash Fortune	Cash fortune Deluxe Grand Coins PC Jade PC Pearl	Cash Fortune Deluxe Grand Coins PC Jade PC Pearl	PC Jade PC Pearl	Wild Wild PC Jade PC Pearl	<ul style="list-style-type: none"> • Mechanics such as Cash on Reels and 5 of a kind offer players an alternative experience
ESTABLISHING NEW TRENDS	Big Sky Reel Hold em' Payrise	Fu Dai Lian Lian Big Blast Martian Millions Dragon Tower Jackpots Ba Zhu Zhao Fu	Fu Dai Lian Lian Big Blast Martian Millions Dragon Tower Jackpots Ba Zhu Zhao Fu	Dragon Tower Jackpots Ba Zhu Zhao Fu Big Blast	Rising Jackpots	<ul style="list-style-type: none"> • A dedication to the future of gaming • Brand new mechanics and titles from around the world for new players

HOLD & SPIN

SCORCHIN' Fortune
FLAME

ULTRA CHARGE

BAO ZHU ZHAO FU
BONUS BOOST

MIDNIGHT EXPRESS

Cash Express
LUXURY LINE

DOLLAR STORM

WILD WILD

BIG BLAST

CHOY'S KINGDOM

FU DAI LIAN
PANDA

BIG SKY



CASH FORTUNE

DRAGON TOWER JACKPOTS

PLAYER'S CHOICE JADE EDITION

ESTABLISHING NEW TRENDS

PROVEN MECHANICS & BRANDS

ARISTOCRAT GAMING™

ARISTOCRAT



Land Based Businesses

12 Global Studio
3300+ employees

Digital Businesses

10 Global Studio
2100+ employees

GLOBAL NETWORK OF STUDIO'S



7 Different Studio's



Market Leading Product



Segmented Portfolio



\$400M+ in Development Costs

DIGITAL OVERVIEW



Based in London, Product Madness burst into life in 2007 offering digital social casino games. Featuring popular Aristocrat content, Product Madness has some of the top performing social casino apps in the world



Lightning Link
Casino



FA FA FA Gold
Casino



Heart of Vegas
Casino



Cashman Casino



Founded in 2002, Big Fish has grown to boast a diversified portfolio of games across three key digital game segments: Social Casino, Social Gaming and Premium Paid games



BIG FISH

POPULAR GAMES ▾

GAME GENRES ▲

WAYS TO PLAY ▾

CAREERS

SUPPORT

ACCOUNT



Hidden Object



Time Management



Match 3



Casino



Adventure



Puzzle



Family



Arcade & Action



Card & Board



Strategy



Mahjong



Brain Teaser



Marble Popper

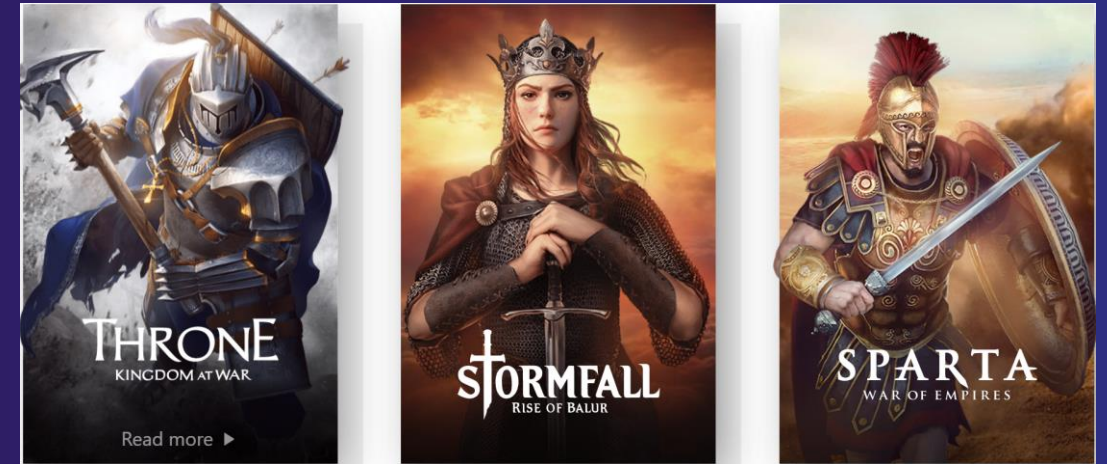
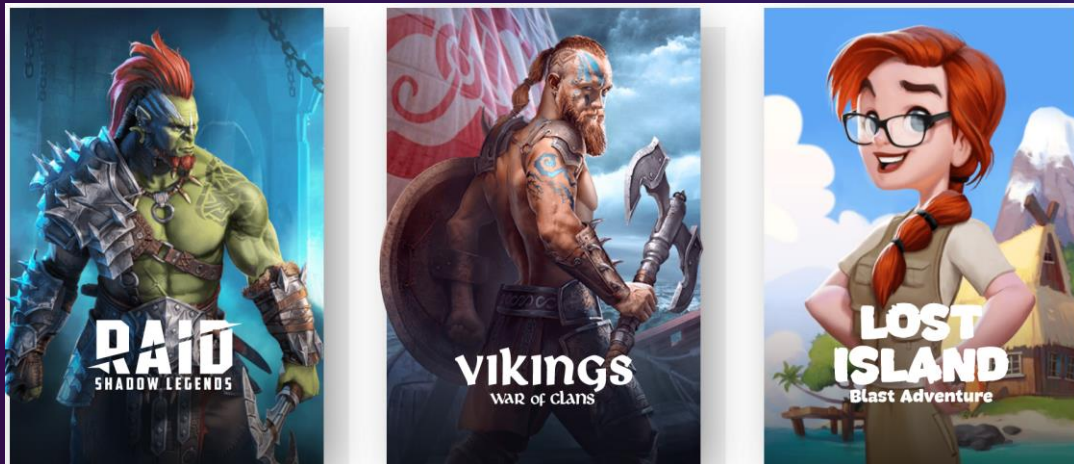


Word



Plarium is dedicated to creating outstanding mobile and social experiences for hardcore and casual gamers worldwide.

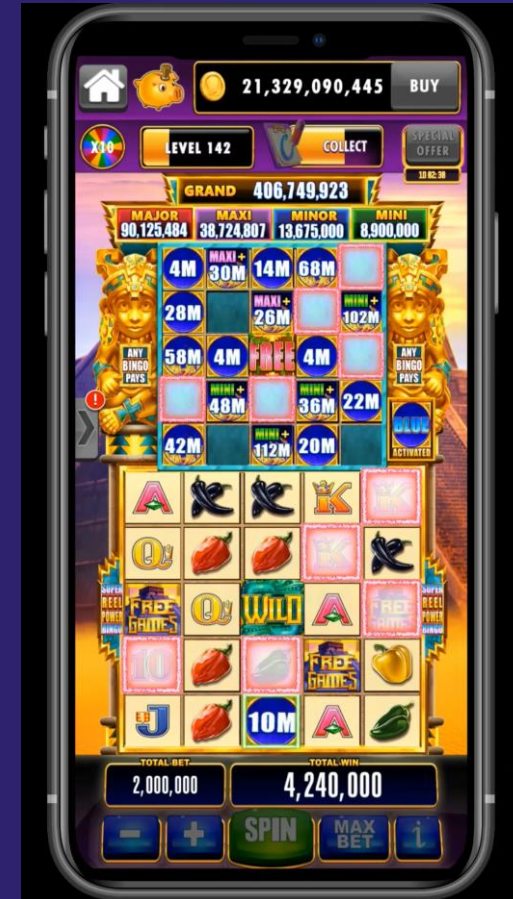
With over 290 million registered users, we're proud to be consistently ranked among the world's top hardcore game developers.



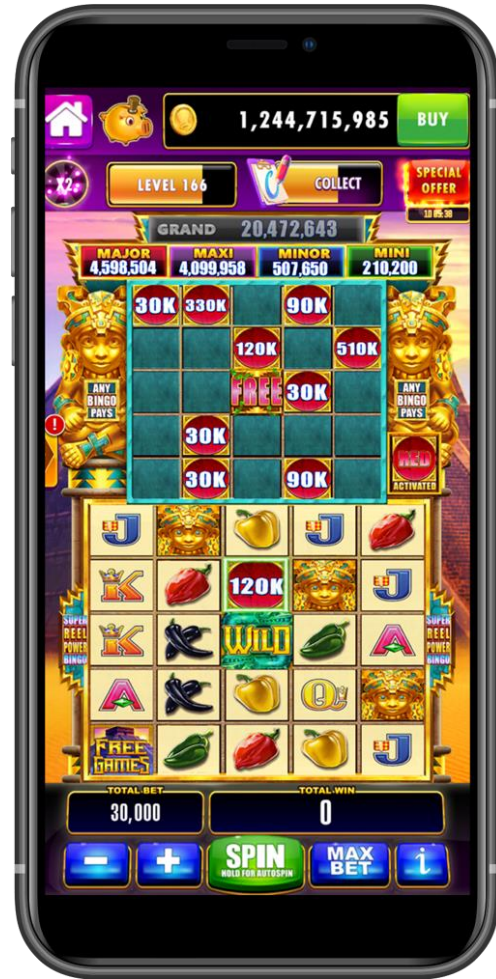
**TONY ALREADY SAID THAT WHY ARE YOU
TELLING ME !!!!**

DIGITAL SHIFT

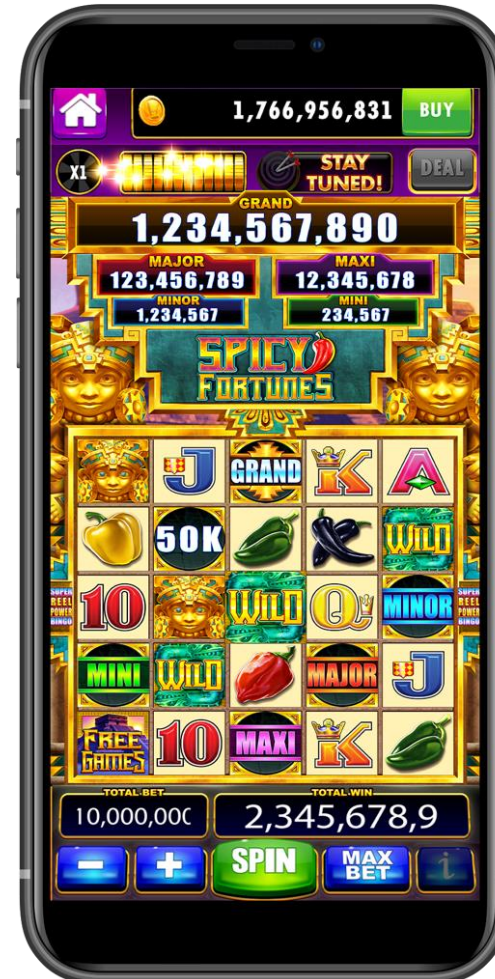
- In 2018 Spicy Fortunes was introduced onto Cashman casino
- The game has a bingo matrix on top of a 5x5 slot game
- If a cash on reel prize is landed on the slot game, it is held on the bingo card above
- Form a bingo line and win the prizes



DIGITAL SHIFT



Version A



Version B

DIGITAL SHIFT

