

HUUUGE

Q3 2023

PRESENTATION

NOVEMBER 2023



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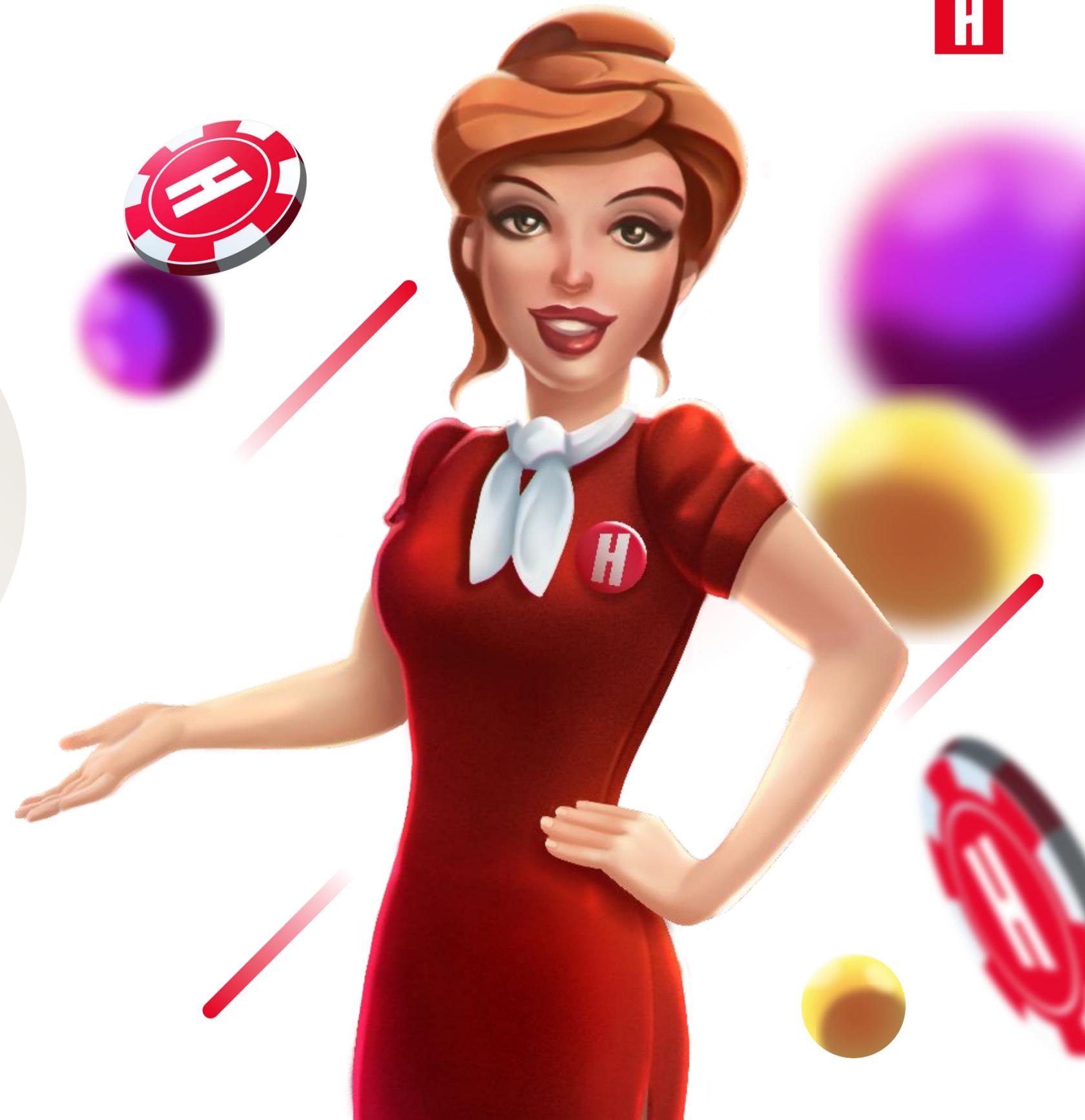
TODAY'S PRESENTERS



Wojciech Wronowski
Chief Executive Officer



Marek Chwałek
Treasurer, EVP Finance



Q3 2023 HIGHLIGHTS



First HC & BC QoQ revenue growth in several quarters

HC & BC QoQ revenue growth of 4.2%

outperforming the declining social casino market
(-2.2% QoQ)*

Another quarter of growing Direct-To-Consumer channel

cost of sales almost flat QoQ

Seasonally the strongest Q4 still ahead of us

supported by HC economy upgrade, stable marketing spend
and a strong calendar of events and sales

T12M Adj. EBITDA reached \$112m and Net OCF \$86.5m

consistently delivering high profitability and strong cash generation

\$1.88
ARPD AU

vs. **\$1.77** Q3 '23

\$72m
REVENUE

vs. **\$78m** Q3 '22

\$27m
Adj. EBITDA

vs. **\$24.5m** Q3 '22



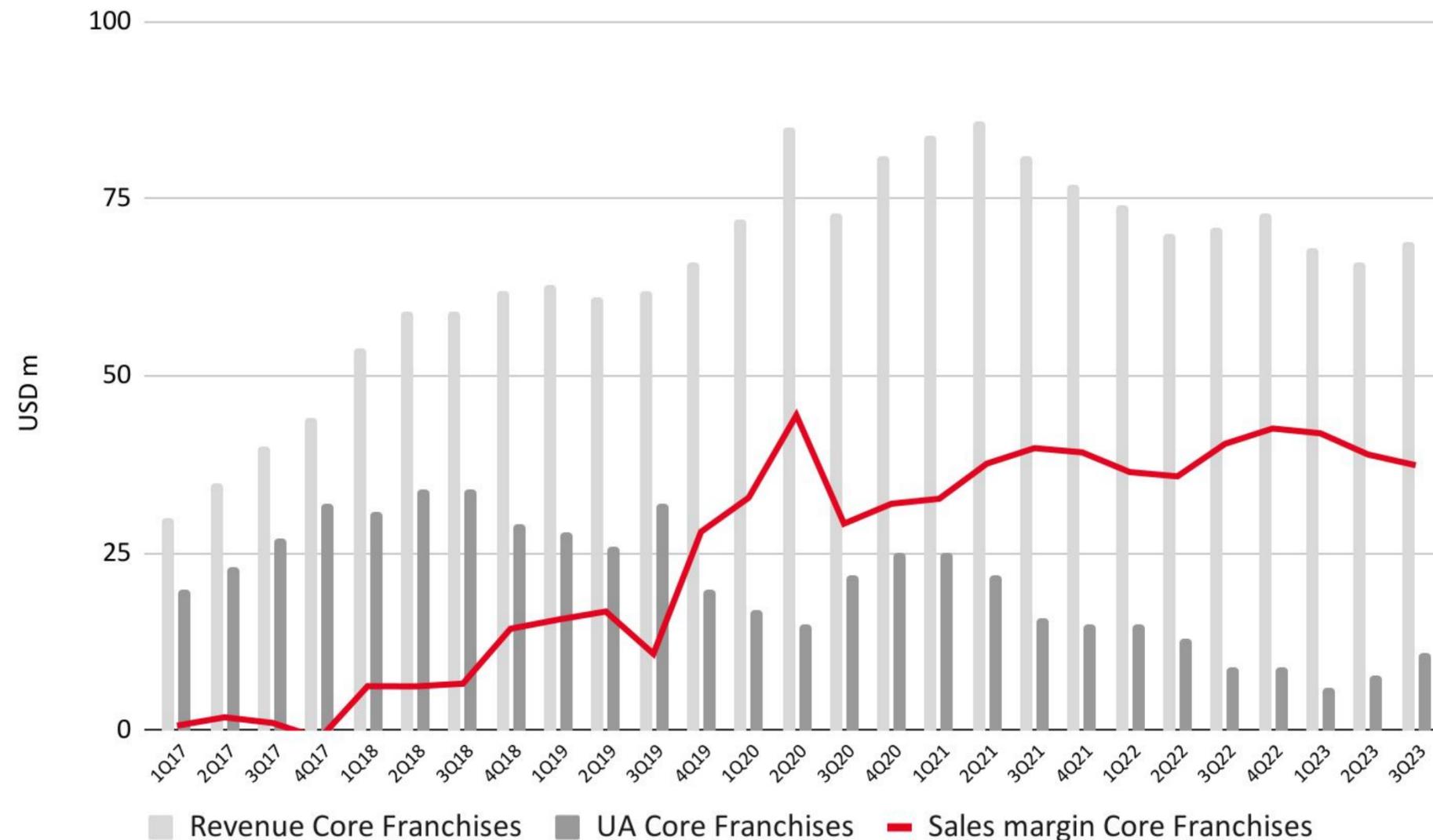
BUSINESS UPDATE

HUUUGE



CORE FRANCHISES IN Q3 2023

First QoQ revenue & DAU growth in a year



- Our **marketing spend in Q3 2023 was higher QoQ as we have been able to increase spend and maintain paybacks within our risk tolerance**
- Best in class monetization metrics have increased (conversion, ARPDAU and ARPPU) thanks to **increasing UA spend and our clubs and social features**
- Extraordinary **retention of our most valuable players**
- Focus going forward on **profitability and longevity: quality vs quantity**
- **UA spend in Q4 2023 should be at a similar level as in Q3**, but we monitor performance on an ongoing basis and might tweak it further

CORE FRANCHISES: PLAYER METRICS IMPROVEMENT



Recent HC economy upgrade, new loyalty program and higher marketing spend had a positive impact on our player metrics in Q3 2023

Core franchises' main KPIs improvement

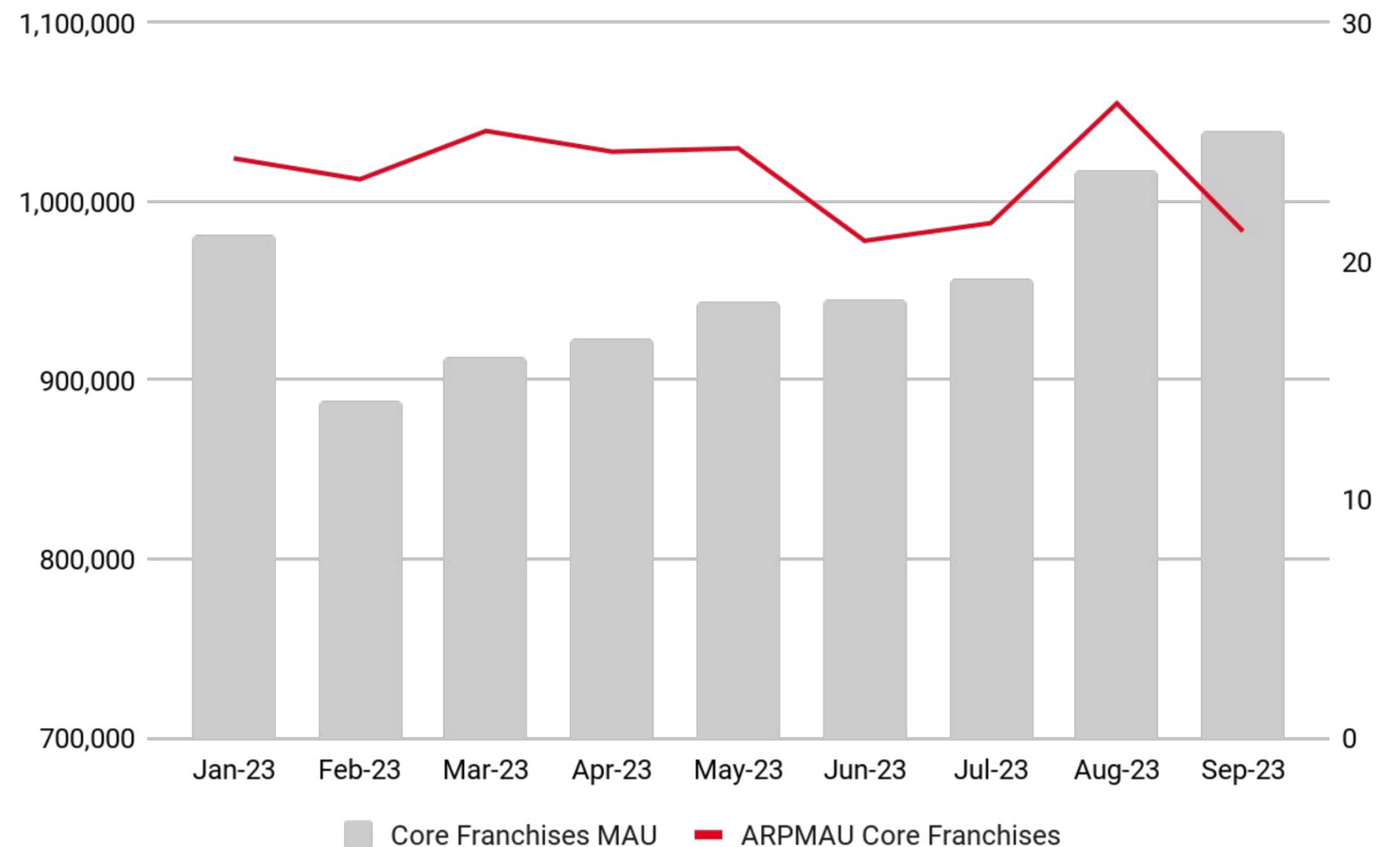
DAU +1% QoQ, ARPDau +3% QoQ, DPU +3% QoQ

MAU Core franchises +17% (since February 2023)

Positive shift in user base trajectory is a result of improvements in both our product and marketing efforts. Average monthly installs have increased by 12.2% since the beginning of the year

Loyalty program

Positive impact on player engagement metrics

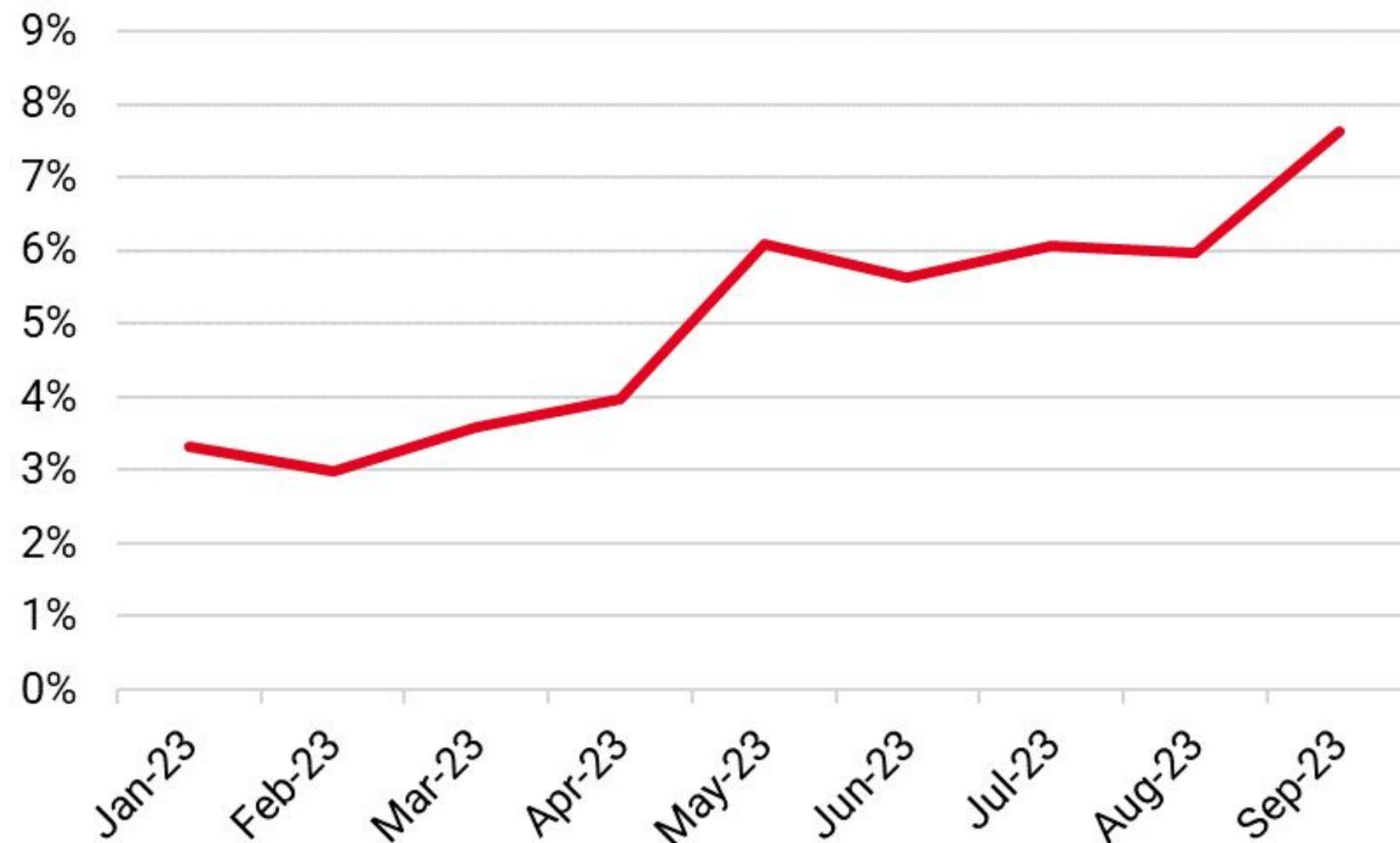


CORE FRANCHISES: DIRECT-TO-CONSUMER CHANNEL SUCCESS



Progress has accelerated rapidly over the past few months

Direct-To-Consumer (Webshop) Revenue as % of Total Revenue

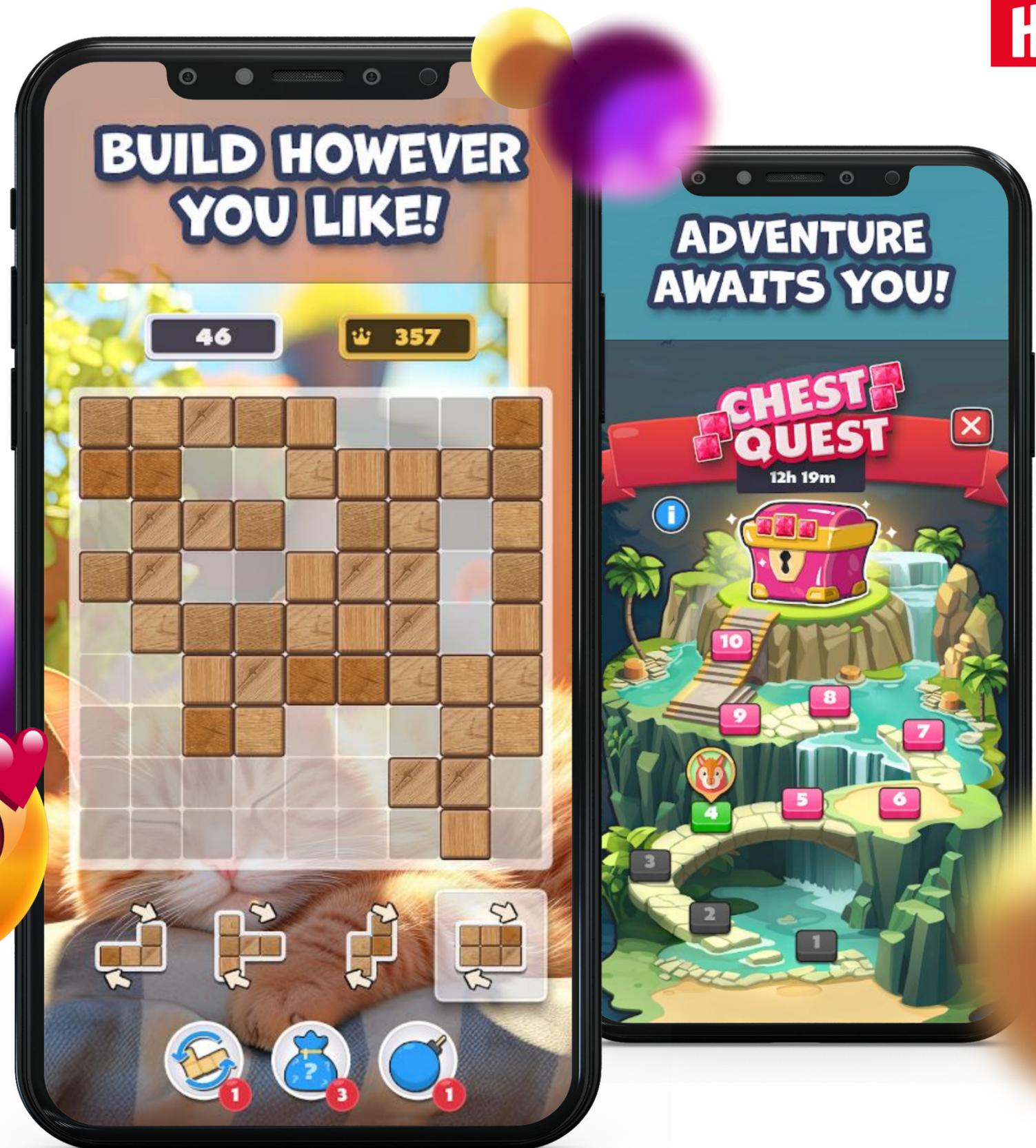


- Webshop performance YTD has exceeded our internal expectations
- DTC revenue reached almost 7% of the total revenue in Q3 2023 with the ratio improving further to around 8% in the most recent months
- We continue to invest further in this channel and we expect more long-term upside
- We are exploring new third party solutions in order to improve our offering in terms of UX, geographical coverage, number of payment providers and login systems. We are in the testing phase and will report more on progress in due course

HUUUGE PODS

Multiplayer multiplatform games for worldwide audiences

- **Four Pods are operational with a goal of driving new growth for Huuuge** - new games, new audiences. We need to acknowledge however that it is a **multi-year plan and we are at an early stage**
- We anticipate bringing **multiple projects to test markets** in the coming years
- We are happy with the current progress, two games are being tested at the moment
- When any of these products reach commercial viability, we will prudently increase marketing investments to support these games



FINANCIAL UPDATE

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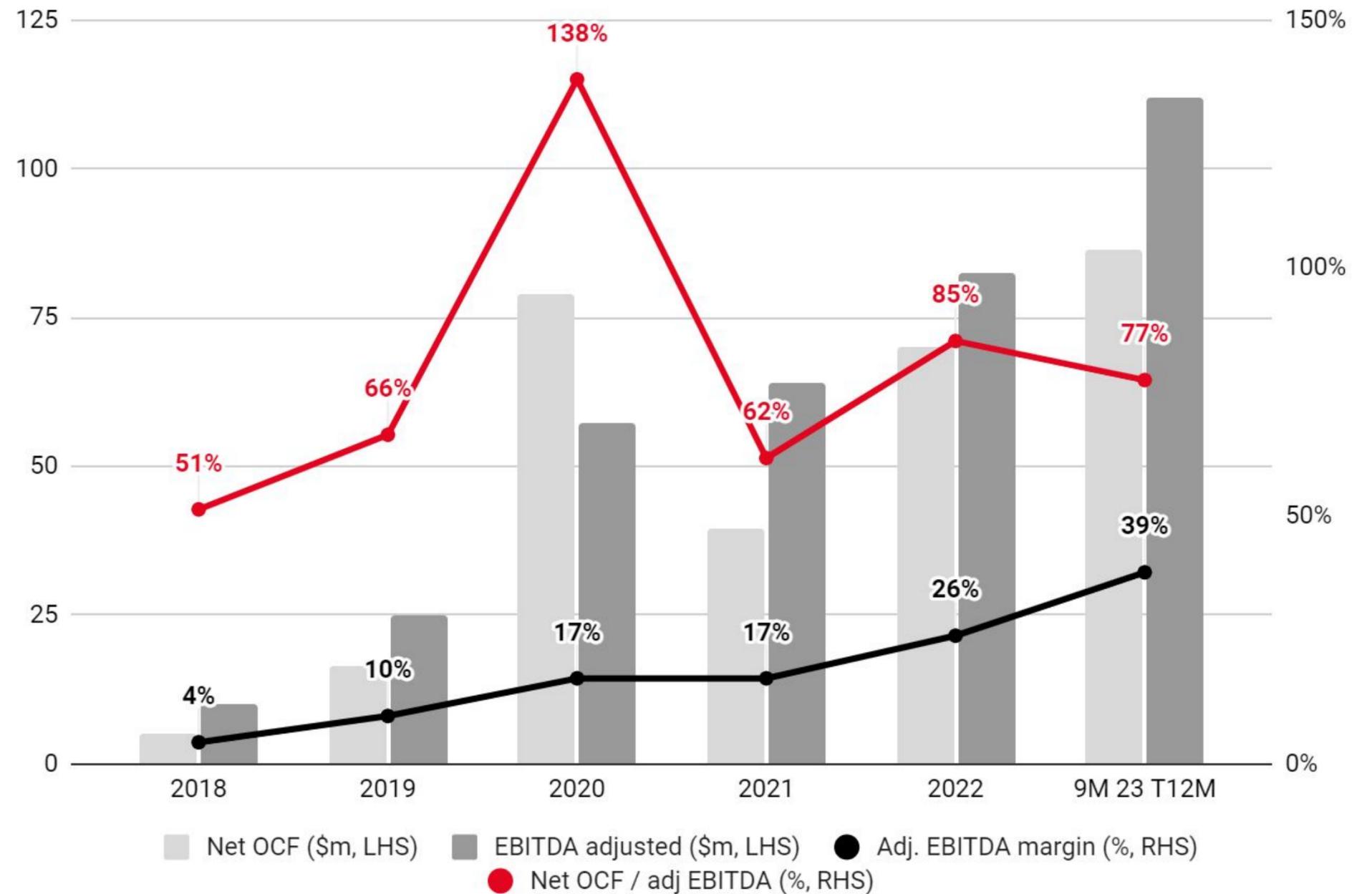
HIGHLY CASH GENERATIVE BUSINESS



We are proud to report that for T12M ended September 30th 2023 we have generated **adjusted EBITDA of USD 112m and net operating cash flow of USD 86.5m**

Cash is king in an uncertain environment and **we are a fundamentally strong business** in an extremely fortunate position

We recognize that we are one of the most cash generative businesses in the games industry (as measured by Net OCF to adjusted EBITDA conversion)



FINANCIAL PERFORMANCE



01 Overall revenue decline was driven mostly by no longer supported Traffic Puzzle revenue (game no longer supported). Reversal of the declining trend in core franchises quarterly revenues (+4.2% QoQ).

02 While the UA campaigns expenses were significantly lower YoY, we started ramping up spend in Q2 2023 (up 22% QoQ) and in Q3 2023 (up 40% QoQ) as paybacks exceeded our expectations.

03 The savings in R&D & G&A expenses are mostly driven by lower headcount (result of optimisations programs carried out in Q1 2023)

04 We created a \$1.7 million provision for a unique legal case in California related to advertising services, anticipating it won't affect other legal actions, and deems the reserved amount adequate for potential financial exposure

USD m	9M 23	9M 22	YoY	Q3 23	Q3 22	YoY
Core Franchises	203.0	215.2	-5.7%	68.9	71.0	-2.9%
Traffic Puzzle	7.6	22.1	-65.8%	1.8	5.7	-67.4%
Other	1.6	3.6	-56.4%	0.5	0.9	-49.1%
01 Revenue	212.1	240.9	-12.0%	71.2	77.5	-8.2%
Gross profit/(loss) on sales	150.1	167.7	-10.5%	50.6	53.8	-5.9%
02 Sales and marketing expenses	(35.7)	(75.0)	-52.4%	(15.3)	(17.7)	-13.3%
Research and development expenses	(17.5)	(23.1)	-24.4%	(4.8)	(6.3)	-22.9%
03 General and administrative expenses	(25.6)	(29.9)	-14.4%	(7.6)	(11.6)	-34.7%
Other operating income/(expense), net	0.1	0.6	-80.7%	(0.2)	0.4	n/a
Operating result	71.4	40.4	76.9%	22.5	18.5	21.7%
Finance income/expense, net	3.9	(1.1)	n/a	0.4	0.1	n/a
Profit/(loss) before tax	75.4	39.3	91.9%	22.9	18.6	23.5%
Income tax	(12.6)	(6.4)	96.5%	(4.3)	(3.3)	30.4%
Net result for the period	62.8	32.9	91.0%	18.7	15.3	22.0%
04 Adjusted EBITDA	82.1	52.6	56.2%	27.0	24.5	10.5%

BALANCE SHEET



- 01** Includes mainly intangible assets and office leases
- 02** Primarily cash and cash equivalents (\$127.7m, or 78% of current assets). **Strong net cash position even after the \$150m SBB settlement**
- 03** Slight decline driven mostly by lower trade payables (payout of 2022 performance bonus and settlement of liabilities related to the strategic options review)

USDm	September 30, 2023	December 31, 2022
01 Non-current assets	30.5	37.4
02 Current assets	163.5	248.9
Total assets	194.0	286.3
Total equity	153.7	240.7
Non-current liabilities	7.5	10.0
03 Current liabilities	32.8	35.6
Total equity and liabilities	194.0	286.3

CASH FLOWS



01 Net operating CF increased significantly YoU both in 9M'23 and Q3'23, but was negatively affected by income tax paid by Group companies

02 The positive investment CF both in 9M'23 and Q3'23 was mostly driven by interest received from bank deposits and money market funds as we have been gradually rolling our cash balance to higher yields

03 Financing CF both in 9M'23 and Q3'23 was mostly affected by share buyback settlement (\$150m)

USDm	9M 23	9M 22	Q3 23	Q3 22
Pre-tax profit	75.4	39.3	22.9	18.6
01 Net Operating CF	57.6	42.1	20.2	15.8
02 Net Investing CF	3.2	-32.0	0.5	-5.3
03 Net Financing CF	-153.9	-21.1	-151.9	-4.8
Change in cash	-93.1	-11.0	-131.2	5.7
Cash End of Period	127.7	193.2	127.7	193.2

OUTLOOK FOR 2023 - REITERATING OUR VIEW



2023 OUTLOOK (YoY)

Revenue	SLIGHT DECLINE
Marketing spend	SIGNIFICANT DECLINE
Opex (non-marketing)	SLIGHT DECLINE
Adjusted EBITDA	SIGNIFICANT GROWTH
Adjusted EBITDA margin (%)	SIGNIFICANT GROWTH

KEY HIGHLIGHTS

- We reiterate our 2023 directional outlook presented during our FY2022 and upheld during recent quarterly investor calls
- With headcount now lower by over 20% vs 2022, materially lower costs will be fully visible in FY 2023
- Q4 2023 revenue should at least match or exceed Q3 2023 as a result of the recent HC economy upgrade, higher marketing spend and a seasonally strong calendar of events and sales
- We expect our marketing spend in the coming quarter to be at a similar level vs Q3 2023
- The above factors should translate into another quarter of similarly strong Adjusted EBITDA in Q4 2023



**THANK
YOU**

For more information please see ir.huuugegames.com

HC & BC QoQ revenue growth of 4.2%
outperforming the declining social casino market (-2.2% QoQ)*

**T12M Adj. EBITDA reached \$112m
and Net OCF \$86.5m**
consistently delivering high profitability and strong cash
generation

Strong cash position
\$128m as of 30.09.2023

Cash distribution to shareholders
strong and growing cash position allows us to explore
investment opportunities not excluding an option of cash
distribution to shareholders next year

FINANCIAL DATA



Profit & Loss account (USD m)	2017	2018	2019	2020	2021	2022	Q1 20	Q2 20	Q3 20	Q4 20	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Q2 22	Q3 22	Q4 22	Q1 23	Q2 23	Q3 23
Revenue	152.1	236.1	259.4	332.7	373.7	318.6	76.0	88.9	78.5	89.2	95.7	97.5	92.0	88.5	84.0	79.4	77.5	77.7	71.7	69.2	71.2
Cost of sales	-44.8	-71.8	-79.1	-99.6	-112.2	-98.9	-23.0	-26.8	-23.5	-26.3	-28.1	-29.4	-28.0	-26.8	-25.5	-24.0	-23.8	-23.6	-21.1	-20.3	-20.6
Gross profit/(loss) on sales	107.3	164.3	180.2	233.1	261.5	221.7	53.1	62.1	55.0	62.9	67.6	68.2	64.0	61.8	58.5	55.4	53.8	54.0	50.6	48.9	50.6
Sales and marketing expenses, including	-103.5	-135.5	-129.5	-125.1	-146.2	-88.8	-24.0	-23.7	-33.9	-43.6	-43.2	-39.3	-34.1	-29.6	-29.9	-27.4	-17.7	-13.8	-9.3	-11.0	-15.3
<i>User acquisition marketing campaigns</i>	<i>na</i>	<i>na</i>	-119.9	-111.5	-130.0	-73.7	-21.4	-19.9	-30.3	-40.0	-39.1	-34.8	-29.9	-26.3	-26.3	-23.1	-14.2	-10.1	-6.3	-7.7	-10.9
<i>General Sales and marketing expenses</i>	<i>na</i>	<i>na</i>	-9.6	-13.6	-16.2	-15.1	-2.6	-3.8	-3.5	-3.6	-4.1	-4.5	-4.2	-3.4	-3.6	-4.2	-3.5	-3.8	-3.0	-3.3	-4.5
Research and development expenses	-4.1	-10.0	-15.8	-29.8	-33.1	-29.6	-5.9	-7.8	-7.6	-8.7	-7.8	-8.0	-9.6	-7.7	-9.0	-7.9	-6.3	-6.5	-7.2	-5.4	-4.8
General and administrative expenses	-4.9	-11.0	-14.2	-27.6	-38.0	-39.6	-5.7	-4.5	-7.2	-10.0	-10.0	-9.5	-9.9	-8.6	-9.1	-9.2	-11.6	-9.7	-10.0	-8.0	-7.6
Impairment of intangible assets						-26.1												-26.1	0.0	0.0	0.0
Other operating income/(expense), net	0.0	-0.2	-6.5	-0.3	0.4	1.0	0.1	-0.3	0.3	-0.4	0.0	-0.1	0.8	-0.3	0.1	0.2	0.4	0.3	0.4	0.0	-0.2
Operating result	-5.1	7.6	14.2	50.2	44.6	39	17.5	25.9	6.8	0.1	6.5	11.2	11.3	15.6	10.7	11.2	18.5	-1.8	24.5	24.4	22.5
Finance income	0.0	0.3	0.5	2.1	0.0	2	0.0	0.4	0.5	1.1	0.1	-0.1	0.0	0.0	0.2	0.0	0.7	1.3	1.6	2.1	0.7
Finance expense	-4.2	-3.2	-5.9	-128.5	-45.6	-2	-3.0	-8.6	-7.6	-109.3	-43.6	0.5	-1.5	-1.0	-0.1	-1.2	-0.7	0.2	-0.1	-0.1	-0.3
Profit/(loss) before tax	-9.3	4.7	8.9	-76.2	-1.0	39	14.6	17.7	-0.3	-108.2	-37.0	11.7	9.8	14.5	10.7	10.0	18.6	-0.2	26.0	26.5	22.9
Income tax	0.2	-1.7	-4.6	-6.4	-8.7	-7	-1.8	-3.5	-1.9	0.8	-0.6	-2.5	-2.4	-3.2	-1.8	-1.3	-3.3	-0.6	-3.6	-4.7	-4.3
Net result for the period	-9.1	3.0	4.3	-82.6	-9.7	32	12.8	14.2	-2.2	-107.4	-37.5	9.1	7.4	11.4	8.9	8.6	15.3	-0.9	22.4	21.7	18.7
Balance sheet (USD m)	2017	2018	2019	2020	2021	2022	Q1 20	Q2 20	Q3 20	Q4 20	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Q2 22	Q3 22	Q4 22	Q1 23	Q2 23	Q3 23
Total non-current assets	2.3	2.0	4.7	17.3	67.5	37				17.3	17.1	55.6	54.6	67.5	65.4	63.2	60.3	37.4	36.5	32.9	30.5
Total current assets	48.6	51.6	48.4	124.5	232.4	249				124.5	221.9	216.8	224.8	232.4	225.8	213.2	218.2	248.9	274.6	293.8	163.5
Total assets	50.8	53.6	53.1	141.8	299.9	286				141.8	238.9	272.4	279.4	299.9	291.2	276.4	278.5	286.3	311.1	326.7	194.0
Total equity	-20.3	-9.5	-19.8	-96.0	226.1	241				-96.0	188.6	200.3	211.8	226.1	236.3	227.4	238.0	240.7	263.8	286.0	153.7
Total non-current liabilities	52.0	47.4	50.1	183.0	13.0	10				183.0	4.8	4.7	4.0	13.0	12.2	11.0	9.8	10.0	9.6	8.6	7.5
Total current liabilities	19.1	15.7	22.8	54.8	60.9	36				54.8	45.6	67.4	63.6	60.9	42.7	38.1	30.7	35.6	37.8	32.1	32.8
Total equity and liabilities	50.8	53.6	53.1	141.8	299.9	286				141.8	238.9	272.4	279.4	299.9	291.2	276.4	278.5	286.3	311.1	326.7	194.0
Cash flow statement (USD m)	2017	2018	2019	2020	2021	2022	Q1 20	Q2 20	Q3 20	Q4 20	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Q2 22	Q3 22	Q4 22	Q1 23	Q2 23	Q3 23
Net cash flows from operating activities	-4.8	4.5	13.0	73.2	29.8	71.0	16.3	26.5	16.0	15.0	-8.3	8.5	18.8	10.8	19.9	6.4	15.8	28.9	16.9	20.5	20.2
Net cash from investing activities	0.7	-0.6	-0.6	-5.5	-16.0	-32.6	-0.6	-1.5	-1.5	-1.9	-0.6	-11.4	-1.7	-2.3	-25.7	-1.1	-5.3	-0.6	1.4	1.2	0.5
Net cash from financing activities	26.9	0.1	-21.1	0.0	96.6	-21.8	9.2	-0.6	-7.9	-1.3	98.6	-0.5	-0.6	-0.9	0.1	-16.3	-4.8	-0.8	-0.9	-1.0	-151.9
EBITDA	-4.6	8.2	16	54	53	50	18.1	26.5	7.4	1.5	7.6	13.3	13.6	18.1	13.3	13.8	21.4	1.2	27.0	26.6	24.7
Adjusted EBITDA	-4.3	10.1	25	57	64	82	18.4	27.3	8.6	3.1	10.4	15.6	17.7	20.7	14.4	13.7	24.5	29.7	27.6	27.5	27.0
Adjusted net result	-5.3	6.3	17	48	41	65	15.6	23.9	7.9	2.1	4.2	11.4	11.4	14.0	10.0	8.6	18.4	27.7	23.0	22.6	21.0

APPENDIX - KPI'S



(users)	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	4Q20	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Q22 22	Q3 22	Q4 22	Q1 23	Q2 23	Q3 23
Total DAU	632,113	850,717	911,048	947,188	789,831	610,489	893,861	888,781	773,229	769,744	727,568	701,620	671,967	557,666	510,702	468,395	426,045	415,491
Core Franchises	509,356	772,029	769,134	628,119	478,960	380,751	567,775	545,487	483,502	452,979	433,872	428,174	384,442	353,568	356,818	344,143	326,640	331,069
New franchises	0	438	67,422	182,039	251,745	201,703	225,327	259,706	243,414	252,353	251,507	239,022	248,754	180,427	138,609	113,468	94,148	81,738
Other	122,757	78,250	74,492	137,030	59,126	28,055	100,759	83,588	46,313	64,412	42,189	34,424	38,770	23,671	15,275	10,784	5,257	2,684

(users)	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	4Q20	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Q22 22	Q3 22	Q4 22	Q1 23	Q2 23	Q3 23
Total DPU	14,152	21,357	25,498	27,146	25,865	22,266	27,775	28,596	26,148	24,364	24,352	24,951	23,123	21,041	19,948	17,814	16,341	16,510
Core Franchises	13,265	20,890	23,831	24,095	20,623	18,134	23,823	23,240	20,820	19,114	19,320	19,788	18,066	17,330	17,352	15,843	14,757	15,231
New franchises	0	2	1,493	2,735	5,068	3,867	3,704	5,199	5,168	5,015	4,891	4,859	4,648	3,456	2,506	1,912	1,563	1,263
Other	887	464	175	316	173	236	248	157	160	235	142	304	410	254	90	60	20	17

(%)	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	4Q20	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Q22 22	Q3 22	Q4 22	Q1 23	Q2 23	Q3 23
Conversion (monthly, MPU/MAU)	4.2%	5.5%	5.5%	4.5%	5.5%	6.3%	4.8%	5.0%	5.7%	5.5%	5.8%	5.6%	5.5%	7.0%	7.9%	8.1%	8.0%	7.9%
Core Franchises	4.9%	6.2%	6.5%	7.4%	8.7%	9.7%	8.3%	8.3%	8.4%	9.0%	9.1%	8.6%	9.2%	10.7%	10.9%	10.8%	10.1%	9.6%
New franchises	n/a	0.9%	4.0%	2.6%	3.5%	3.5%	2.7%	3.3%	3.7%	3.5%	3.5%	3.5%	3.2%	3.7%	3.9%	3.8%	3.8%	3.6%
Other	1.8%	1.4%	0.4%	0.4%	0.7%	1.8%	0.5%	0.3%	0.9%	0.9%	0.9%	1.5%	1.8%	2.6%	1.2%	1.1%	0.5%	0.6%

(USD)	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	4Q20	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Q22 22	Q3 22	Q4 22	Q1 23	Q2 23	Q3 23
ARPPU	0.66	0.76	0.78	0.96	1.30	1.43	1.08	1.20	1.39	1.30	1.32	1.33	1.29	1.50	1.66	1.70	1.77	1.89
Core Franchises	0.80	0.83	0.90	1.36	1.88	2.07	1.55	1.72	1.96	1.93	1.93	1.92	2.00	2.17	2.23	2.19	2.21	2.29
New franchises	n/a	0.10	0.27	0.27	0.48	0.39	0.36	0.46	0.50	0.48	0.47	0.44	0.38	0.37	0.36	0.35	0.33	0.32
Other	0.07	0.09	0.04	0.06	0.08	0.13	0.07	0.07	0.09	0.07	0.10	0.15	0.14	0.11	0.07	0.07	0.08	0.06

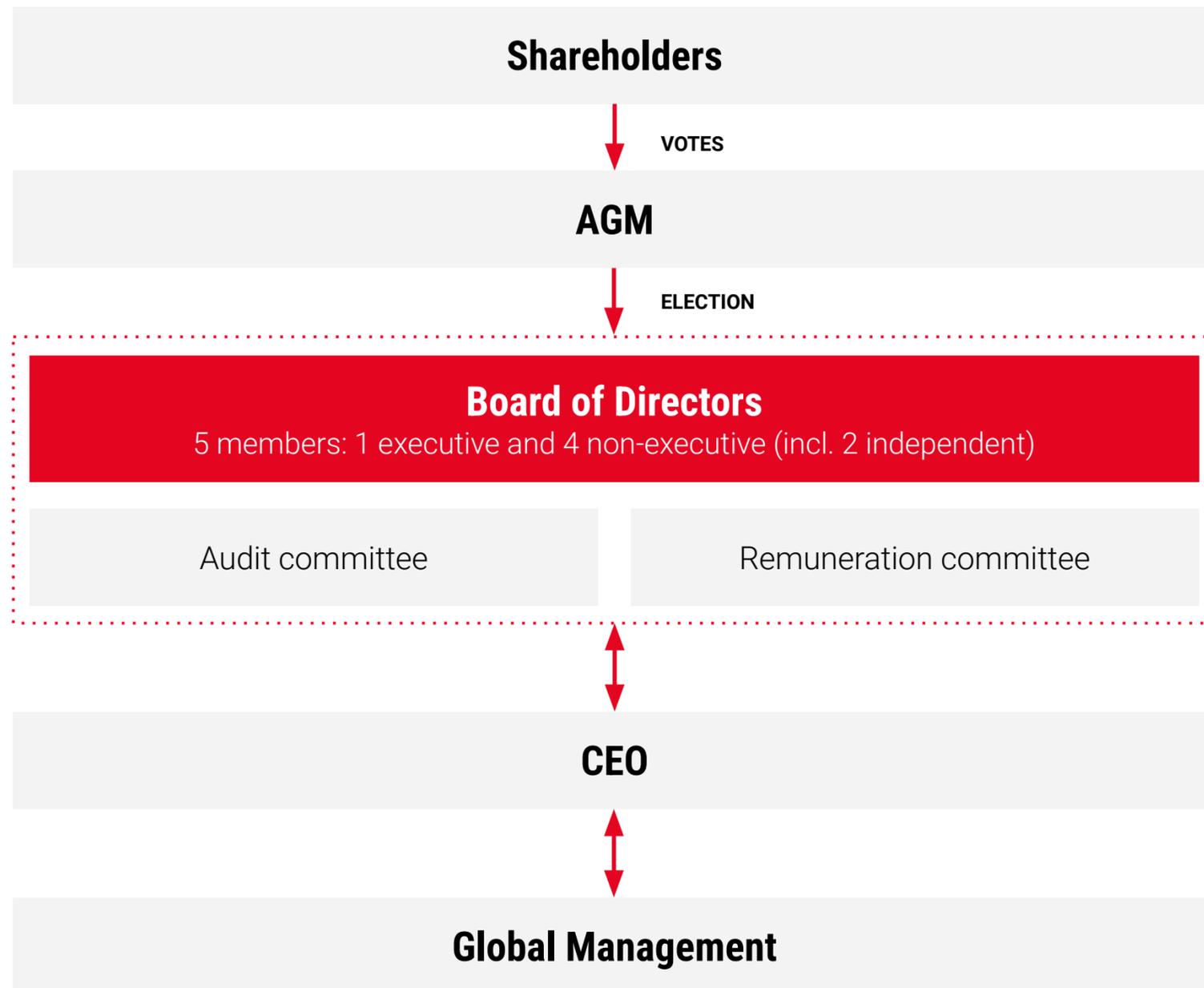
(USD)	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	4Q20	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Q22 22	Q3 22	Q4 22	Q1 23	Q2 23	Q3 23
Daily ARPPU	28.7	29.9	27.8	32.8	38.0	38.0	33.7	35.7	39.5	39.3	37.7	35.9	36.1	38.9	41.7	44.0	45.6	47.1
Core Franchises	30.2	30.4	28.9	35.3	43.5	43.4	36.9	40.3	45.4	45.7	43.4	41.5	42.4	44.4	45.9	47.6	49.0	49.8

APPENDIX - GLOSSARY



ARPPU	Average revenue per paying user.
ARPPU	Average revenue per paying user.
DAU	The number of individual users who played a game on a particular day.
DPU	The number of players (active users) who made a purchase on a given day.
EPS	Earnings per share
Live Ops	Activities aimed at increasing the player engagement, among others, by adding new features to games, recurring and one-off virtual events in which players can participate, and active management of promotions within the game.
MAU	The number of individual users who played a game during a particular month.
Monthly Conversion	The percentage of MAU that made at least one purchase in a month during the same period In-app purchases. Payments made by users after downloading a game, in connection with the purchase of additional game features. In-app purchases can be made through various non-cash payment instruments (e.g. payment card, transfer), various electronic channels (e.g. e-banking, mobile phone) or using payment service providers (e.g. PayPal).
MPU	MPU is defined as the number of players (active users) who made a purchase at least once in a given month.
Retention	The number of users who continued to use the game after a certain period of time after downloading the application.
UAMC	
User acquisition marketing campaigns	Process of the acquisition of users through paid campaigns or promotional offers

GOVERNANCE DETAILS



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