

Scout Security (ASX: SCT) is a white label security-as-a-service platform and product suite powering recurring revenue for some of the largest security, internet service, and telco providers in the world.



## ASX RELEASE

19 December 2025

# ASX Announcement – 2025 Extraordinary General Meeting CEO Address

In accordance with the ASX Listing Rules, the CEO address to the 2025 Extraordinary General Meeting ("EGM") is appended.

This ASX release has been authorised for release by the Board of Directors.

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### About Scout Security Limited

Scout Security Limited (ASX: SCT) sells the Scout Alarm, a self-installed, wireless home security system that is making security more modern, open and affordable. Scout was recognized as one of Forbes "Best Home Security Companies of 2022" and was named "Best for Custom Notifications and Alarms" in 2021 by US News and World Report.

Scout's design-centric offering gives users complete flexibility around connected home security, allowing the system to integrate with other best-in-class IoT devices and offering flexible monitoring options. Scout is focused on being the industry's leading white label provider of DIY home security and IoT solutions.

Scout is an official partner of Amazon Alexa and Google's Assistant. Scout is also an Amazon Alexa Fund portfolio company.

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## CEO Address

I'm excited to walk you through our vision and strategy for Scout as we continue building an end-to-end technology company. Over the last several years, Scout has evolved from one of the first DIY security innovators in the United States into a global white-label platform powering telcos, ISPs, and enterprise security providers.

Today I'll be discussing the momentum we've built over the past year, our strategic acquisition of Roo Inc., our expansion into insurtech as a white label vertical, our AI-centric strategy, and the further industry consolidation plans we have. All which positions Scout at the center of the next decade of smart security and the connected home.

Scout stands today as one of the only globally scalable, white-label DIY security platforms. The business is commercially proven with more than \$1 million in ARR, a strong enterprise pipeline, and established partnerships with major telcos and technology companies

We are in the process of acquiring Roo Inc., which will add an additional \$1 million-plus in ARR and meaningfully expand our subscriber base.

Our strategy is straightforward: leverage our proven subscription model, deepen enterprise integrations, scale efficiently to profitability, and consolidate adjacent verticals where our technology advantage and expertise give us a clear ability to win.

The acquisition of Roo Inc. is a transformative milestone for Scout.

Roo brings 1.3m in ARR, 29,000 paying subscribers, a Fortune 100 retail relationship, and a user base of nearly 900,000 individuals we can cross-sell into.

Also importantly, Roo expands our IP portfolio with patented privacy-centric cameras and doorbell technologies. As well as additional security hardware and manufacturing partnerships. Assets that differentiate us meaningfully in an increasingly crowded security landscape.

Post-restructure, the group is expecting to be EBITDA positive. With the integration of their package theft insurance offering, we unlock new ARPU opportunities for Scout white label partnerships, and long-term customer retention levers.

This acquisition positions Scout as a leading D2C and enterprise hybrid operator with a scalable foundation for accelerated growth.

Our next major growth engine is planned for launch in Q1 2026 through our white-label partnership with Bolt Tech. Integrating our water sensors and monitoring technology to their platform, while selling through hardware and monthly recurring services to their in-house home insurance carrier and 3<sup>rd</sup> party carrier partners.

By integrating climate and water sensing technologies, we enable insurers to reduce risk, lower premiums, and offer smarter home protection. For Scout, this means multiple revenue streams: non-recurring engineering fees, hardware sales, and ongoing recurring monthly revenue.

This partnership marks our expansion beyond traditional security and into risk mitigation infrastructure—an area undergoing rapid technological disruption.

As we look forward, Scout is increasingly defined by AI-centricity, full market penetration, and an industry roll up strategy.

Our capabilities will include WiFi Sensing, ambient AI sensing, predictive automations, aged-care intelligence, and AI-enhanced business operations.

We are no longer just a white-label security provider with a small D2C presence. We are becoming the only home security provider leading in ISP and insuretech white labeling, D2C e-commerce, and retail. With goals to aggressively expand in all 3 verticals.

With a highly skilled team, established partnerships, and enterprise-scale platform reliability, we are positioned to industry a unique industry roll-up strategy across IoT, access control, health, aged care, and adjacent markets.

The future of this industry will be shaped by those who can unify sensors, intelligence, and automation. Scout is architected to lead that shift.

Organic growth has been our driving principal since Scout was founded. Today, however, we are amplifying that with our disciplined and focused M&A strategy.

The smart home market has seen billions invested, but many companies were ahead of mass-market adoption and now lack the scale or infrastructure to continue independently.

Scout is ideally positioned to acquire, integrate, and operationalize these assets. Our model is built for high margin recurring revenue, operational efficiency, and selling across verticals including home security, aged care, smart home, and health and safety.

Each acquisition we pursue strategically expands ARR, adds proprietary technology, and strengthens our core. All while improving our operational efficiencies and financial position.

Before we conclude, I want to thank all our shareholders, partners, employees, advisors, and board members. It's been a winding journey at Scout, yet I fully believe the strongest phase in our history is at hand. A phase defined by scale, intelligent sensing, and category leadership.

- END -

### **About Scout Security Limited**

Scout Security Limited (ASX: SCT) is a white label security-as-a-service platform and product suite powering recurring revenue for some of the largest security, internet service, and telecommunications providers in the world. Scout's simple and affordable DIY approach puts security within reach for millions of residential homes, small-to-medium businesses and multi-tenant buildings.

Scout was recognized as one of Forbes "Best Home Security Companies of 2022" and was named "Best for Custom Notifications and Alarms" in 2021 by US News and World Report. Scout's design-

centric offering gives users complete flexibility around connected home security, allowing the system to integrate with other best-in-class IoT devices and offering flexible monitoring options.

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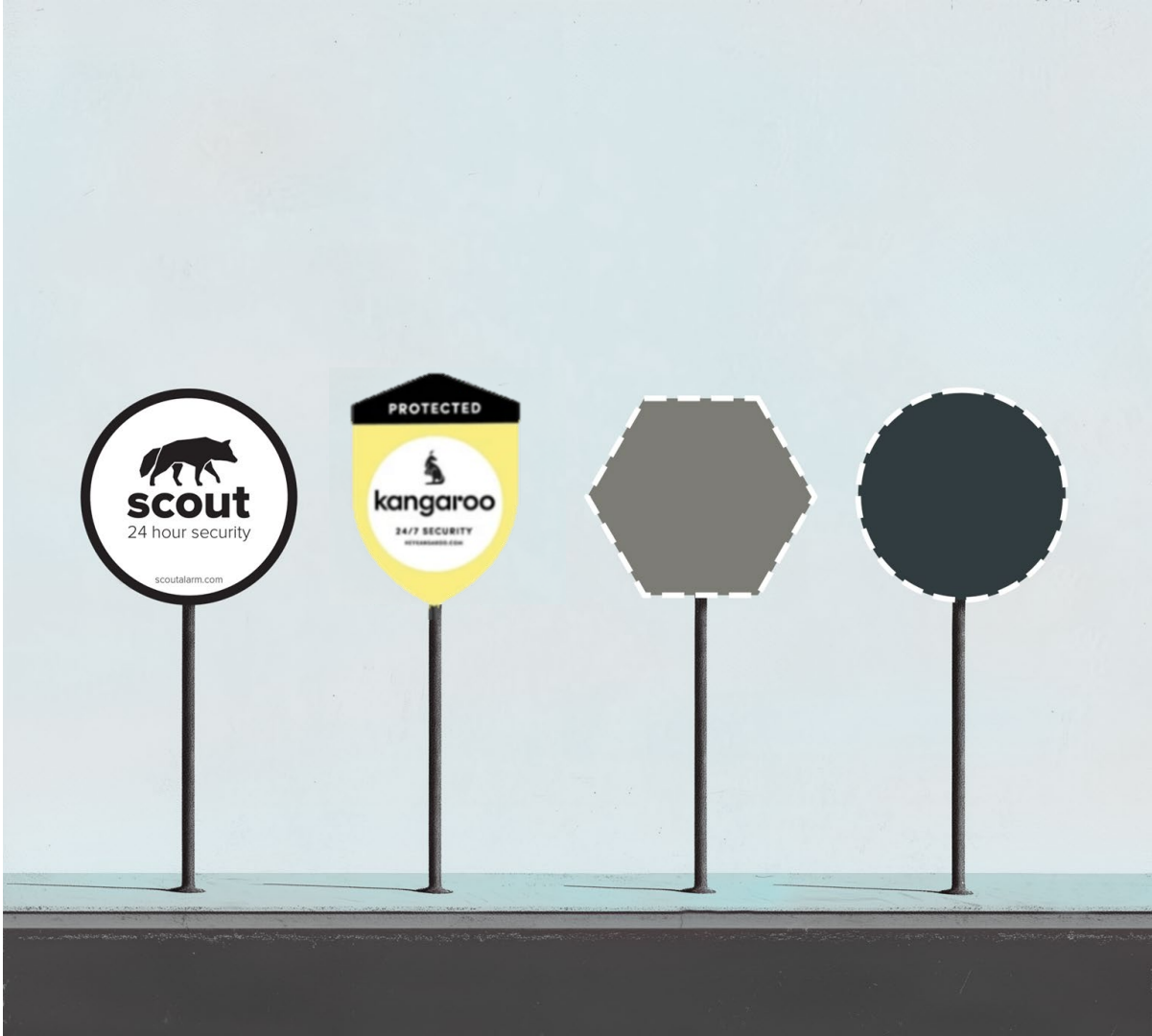
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## Building an End-to-End Security Tech Company

INVESTOR PRESENTATION

December 2025



# Scout Today

Leading white-label DIY security platform for telco, ISP & security enterprises. Turnkey. Global.

- Commercially proven with > \$1m ARR
- Key partnerships & pipeline in place
- Acquiring Roo Inc, adding \$1m+ ARR
- Scaling our platform to profitability and consolidating strategic, adjacent verticals

**ESTABLISHED  
RECURRING  
REVENUE  
MODEL**

## Subscription-Centric ARR

Scout was one of the first D2C, DIY security companies in the USA and, today, is established as one of the only white label DIY platforms globally.

**PARTNERS &  
CUSTOMERS**



windstream.

LUMEN



Stanley  
Black &  
Decker

**ORIGIN™**  
WIRELESS AI

"Mega Cap"  
Tech Co

## Vetted by Name Brands



# Acquisition of Roo Inc.

Leading D2C DiY security company with outstanding e-commerce distribution and in-store retail presence

- + **AUD\$1.3m subscription ARR**
- + **29,000 paying subscribers**
- + **Fortune 100 retail partner**
- + **Cross-sell to 900k users**
- + **Expected EBITDA positive post-restructure**
- Enhanced IP portfolio with Roo patented privacy camera and doorbells
- Valued added services with Roo package theft insurance for increased ARPU and customer stickiness





Insuretech white label partnership

- + **Launching Q1 2026**
- + **Insuretech platform and inhouse home insurance carrier**
- + **Utilizing climate / water sensors for reduced insurance premiums**
- + **Non-recurring engineering fees, hardware sales, and monthly recurring revenue streams**





# Scout's Future

White label, D2C, AI, WiFi Sensing, and industry Consolidation



## AI-Centricity

- WiFi Sensing AI
- Aged Care Intelligence
- Ambient AI Sensing
- Predictive Automations
- AI enhanced business operations



## Expanded Market Scope

- Leading white label offering with Scout, Roo, and Fortune 10 partner
- More than telco, insurtech expansion
- Established retail partnerships
- Robust D2C e-commerce



## Industry Consolidation

- Security, IoT, access control, aged care, and adjacent technologies
- Leveraging synergies and economies of scale
- Industry knowledge and expertise to succeed

# Growth via Strategic Acquisitions

Scout is actively pursuing M&A in the smart security space and adjacent verticals to increase revenue with minimal team expansion.

- + **Recurring Subscription Revenue**
- + **Verticalization & Cross-Sales**
- + **Proprietary & Patented Tech**
- + **Self-Sustaining Operations**



Billions have been invested in ahead-of-the-curve smart home tech. This has been exhausted, often before mass market adoption.

### Disclaimer:

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