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2026

IVE Group Limited (ASX: IGL)

FY26 H1 Results



idea > execution

Melbourne
Sydney
Brisbane
Adelaide
Perth
Tasmania
International

Contents

>	Introduction and strategy	3
>	Performance overview	7
>	Underlying financial performance	8
>	Financials	9
	Underlying profit and loss	10
	Balance sheet	12
	Capital expenditure	13
	Cash flow and dividends	14
>	Key initiatives	15
	Sydney supersite	16
	Lasoo	17
	Catalogue market research	18
	Events	19
	'Now to 2030 strategy' - acquisition initiatives	22
>	FY26 outlook and guidance	26
>	Appendices	28

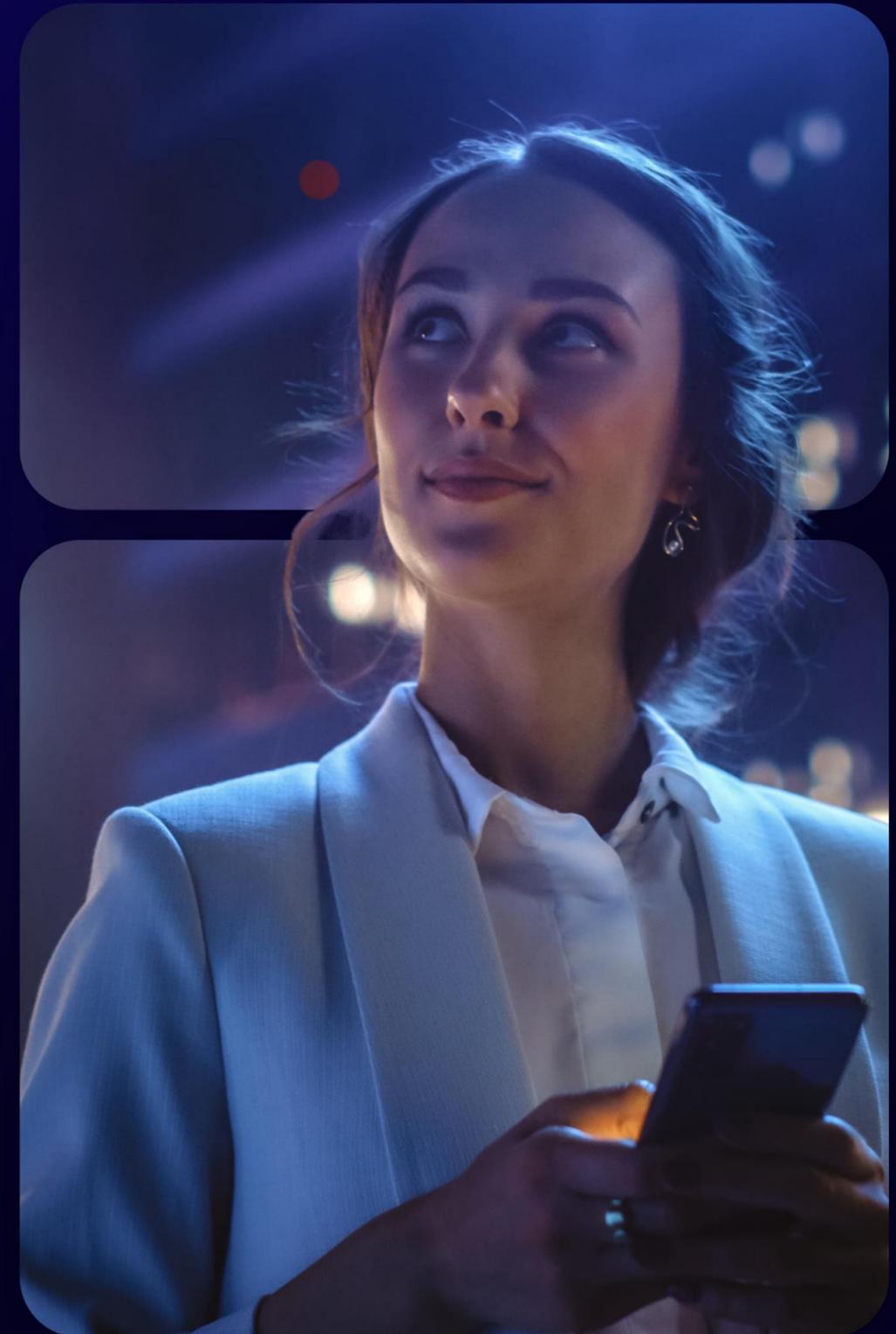


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IVE Group is Australia's largest diversified marketing company

We operate across every major marketing discipline, giving brands the confidence that what they imagine can actually be delivered consistently (and brilliantly) in the real world.





A Century of Growth

**Since 1921,
IVE has evolved
alongside brands,
technology and
consumer behaviour.**

Through trusted partnerships and strategic acquisitions, we've brought strategy, data, creativity, production, technology and fulfilment into one connected system.

From idea to execution, we remove friction so brands can adapt with the times and complex marketing becomes simpler, faster and more effective.



Markets shift. Channels evolve. Customer expectations don't stand still.

IVE has spent more than 100 years evolving with every major change in media, technology and marketing, not by chasing trends, but by continuously building our capabilities around what brands need next. That's why we're still here. And why we're thriving.

Businesses navigating change, complexity or scale, don't need another supplier, they need experienced partners who know how to adapt and execute at pace.

We are the experts who've been doing it for over a century.



> Now to 2030

Strategic Framework

Our Vision

To be Australia's leading integrated marketing solutions provider, delivering impactful, human-centred experiences across all channels.

2030 Ambition

Revenue



Achieve **\$1.2B - \$1.3B** by 2030 through a mix of organic growth and strategic acquisitions, with a focus on sustainable, long-term expansion.

In progress

EBITDA Margin



Drive EBITDA margins above **15%**, ensuring profitability across all business units.

Achieved

EPS Growth



Deliver annual earnings per share (EPS) growth of **3-5%+** per annum, ensuring consistent returns to shareholders.

In progress

Revenue Mix



Continue to protect and maintain our leadership in traditional sectors, ensuring stable revenue streams while expanding into emerging growth areas.

In progress

Net Debt



Keep net debt at a conservative position of **1.5x EBITDA** (up to 2x EBITDA if the right opportunity presents).

Achieved

Acquisition Growth Areas

- > Creative & Content
- > Apparel & Uniforms
- > Brand Activations
- > 3PL
- > Retail Media
- > CX & Data
- > Merchandise

In progress

H1 Highlights

New Business Wins



Capital Management

- Share buy-back
- Updated dividend policy

Optimise

- Kemps Creek Supersite
- VIC site consolidation
- Market consolidation - Impressu, BMS

Expand and Grow

- Kemps Creek - Packaging
- Daily Press Acquisition - creative and content
- Formalise entry into the Events sector
- Queensland production (Impressu)

Innovation

- Customer technology refresh
- Ai and process automation initiatives

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> Performance overview

Solid half-year result

Financial performance

- > Margin expansion consistent with 'Now to 2030' strategy
- > Revenue softness in catalogues and publishing
- > Cash flow remains strong and working capital relatively stable
- > Gearing remains conservative
- > On-market buyback resulted in the cancellation of a further 992,167 shares or ~0.6% of issued capital at an average cost of \$2.72ps

Key updates

- > **3PL expansion**
 - Dandenong operational ahead of schedule
 - already at 80% capacity due to new client wins with benefits emerging in 2H FY26
- > **Packaging**
 - JacPak relocating to Braeside in 2H FY26 for additional operational efficiencies
 - NSW expansion in line with Kemps Creek opening
 - revenue commitments building with major new clients coming online in CY26
- > **Sustainability** – initiatives ongoing including preparation for mandatory AASB S2 climate-related financial disclosure

Key initiatives

- > **Kemps Creek, Sydney supersite**
 - construction complete
 - fit out well advanced
 - relocation commencing in April 2026
- > **Lasoo**
 - strong momentum across all key metrics
 - on track to break even during FY28
- > **Catalogues** – proving up the value of catalogue distribution
- > **Events** – leveraging IVE's unique in-house capabilities
- > **Acquisition initiatives** – revenue diversification and consolidation consistent with 'Now to 2030' strategy

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> Solid underlying financial performance¹



1. The underlying financial results are on a non-IFRS basis, exclude various non-operating items (refer Appendix A) and are not audited or reviewed

2. NPATA - NPAT excluding amortisation of acquired customer contracts



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> Financials

> Underlying profit and loss¹

	1H FY26 \$m	1H FY25 \$m	Variance %
Revenue	476.5	507.8	(6.2)
Material profit	241.5	246.1	(1.9)
<i>% of revenue</i>	50.7%	48.5%	4.5
EBITDA	75.4	74.1	1.8
<i>% of revenue</i>	15.8%	14.6%	8.4
Depreciation and amortisation	25.7	22.6	13.9
EBIT	49.7	51.4	(3.3)
Net finance costs	7.9	8.4	(5.4)
NPBT	41.7	43.0	(2.9)
Income tax expense	13.3	13.7	(2.8)
NPAT	28.4	29.3	(3.0)
<i>% of revenue</i>	6.0%	5.8%	2.8
NPATA ²	30.4	31.1	(2.4)
<i>% of revenue</i>	6.4%	6.1%	4.5
EPS (NPAT) cents	18.4	19.0	(2.9)
EPS (NPATA) cents	19.7	20.1	(2.0)

1. The underlying financial results are on a non-IFRS basis, exclude various non-operating items (refer Appendix A) and are not audited or reviewed

2. NPATA - NPAT excluding amortisation of acquired customer contracts



Underlying earnings

- > Strong MGM and cost control drove EBITDA and NPAT margin expansion
- > EBITDA up 1.8% to \$75.4m
- > EBITDA margin up to 15.8% from 14.6% pcp
- > EBIT down 3.3% to \$49.7m
- > NPAT down 3.0% to \$28.4m
- > Pre-AASB 16 NPAT broadly unchanged

Revenue

- > Revenue down 6.2% to \$476.5m¹
- > CX & Data, Creative and 3PL performed well
- > New client wins include Bunnings, Subway, Bapcor, Direct Electronics, Weldclass, Maxi-safe, Mirvac, Sydney Airport and Dominos
- > Packaging new business wins set to come online in late 2H FY26 and into FY27

Material gross profit margin (MGM)

- > MGM improved to 50.7% from 48.5% pcp
- > All revenue streams experienced either stable or improved MGM
- > The further uplift in MGM reflects:
 - Leveraging improved buying power as the Group's scale increases; and
 - Business mix changes

Non-operating items

Non-operating items of \$5.8m pre-tax included:

- > \$3.4m Lasoo operating loss broadly in line with pcp and budget;
- > \$2.3m of restructure/relocation costs;
- > \$1.4m of acquisition costs; and
- > \$1.4m net profit on sale of property and fixed assets



1. Includes ~\$5m incremental impact of acquisitions

> Strong balance sheet

Net debt	1H FY26 \$m	FY25 \$m	1H FY25 \$m
Loans and borrowings ¹	222.5	164.5	170.9
Less cash	50.2	50.1	49.5
Net debt	172.3	114.4	121.4
Net debt/EBITDA (pre-AASB16)	1.59x ²	1.05x	1.13x ²
Net debt/EBITDA (post-AASB16)	1.25x ²	0.84x	0.89x ²

1. Loans and borrowings are gross of facility establishment costs and exclude AASB 16 right of use liabilities impacts

2. Based on rolling 12-month EBITDA

- > Cash at bank broadly unchanged at \$50.2m
- > Net debt increased to \$172.3m, reflecting acquisition funding coupled with peak working capital seasonality and elevated capex for growth initiatives
- > Gearing is broadly in line with expectations of 1.5x pre-AASB 16 EBITDA (<1.2x post-AASB 16 EBITDA) noting peak working capital seasonality
- > Senior debt facility increased by \$80m to \$330m in December 2025 to provide further growth and expansion capacity
- > Undrawn debt capacity of \$106m

> Capital expenditure

Supporting execution of major strategic initiatives

Capital expenditure	1H FY26 \$m	1H FY25 \$m
Investment and maintenance	8.0	5.3
Packaging capacity expansion	12.2	8.5
Dandenong and Kemps Creek fit outs	6.1	-
Asset sale proceeds	(3.7)	(0.7)
Total	22.5	13.1

- > Capital expenditure was \$22.5m (net of disposals), including \$12.2m for the replacement sheet fed printing presses and other equipment to facilitate IVE's packaging capacity expansionary plans at Kemps Creek and Braeside (of which ~\$7m was deferred from FY25 to align with the Kemps Creek relocation)
- > Capital expenditure also included \$6.1m relating to the fit out of the Dandenong and Kemps Creek sites as well as \$8.0m of investment and maintenance
- > Excluding one-off growth initiatives, capital expenditure is expected to normalise in FY27

> Cash flow and dividends

Operating cash conversion remains strong

Cash flow and dividends	1H FY26 \$m	1H FY25 \$m
EBITDA	75.4	74.1
Movement in NWC/non-cash items in EBITDA	(12.1)	(5.9)
Operating cash flow	63.3	68.2
Operating cash conversion to EBITDA	84.0%	92.0%
Dividend per share	9.5¢	9.5¢

- > Operating cash conversion to EBITDA remains strong at 84.0%
- > Working capital is expected to remain relatively stable hereafter, broadly in-line with revenue (and seasonality)
- > Fully franked final dividend of 9.5¢ps (1H FY25 9.5¢ps), stable on pcp, consistent with guidance

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> Key initiatives

Kemps Creek

> Sydney supersite leveraging scale

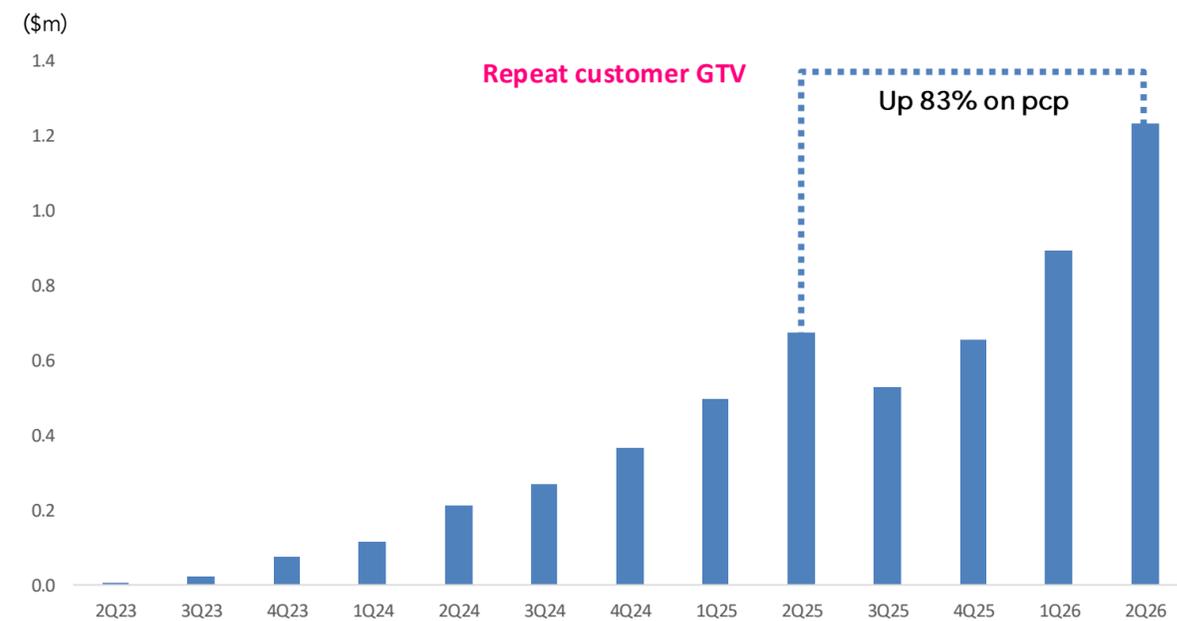
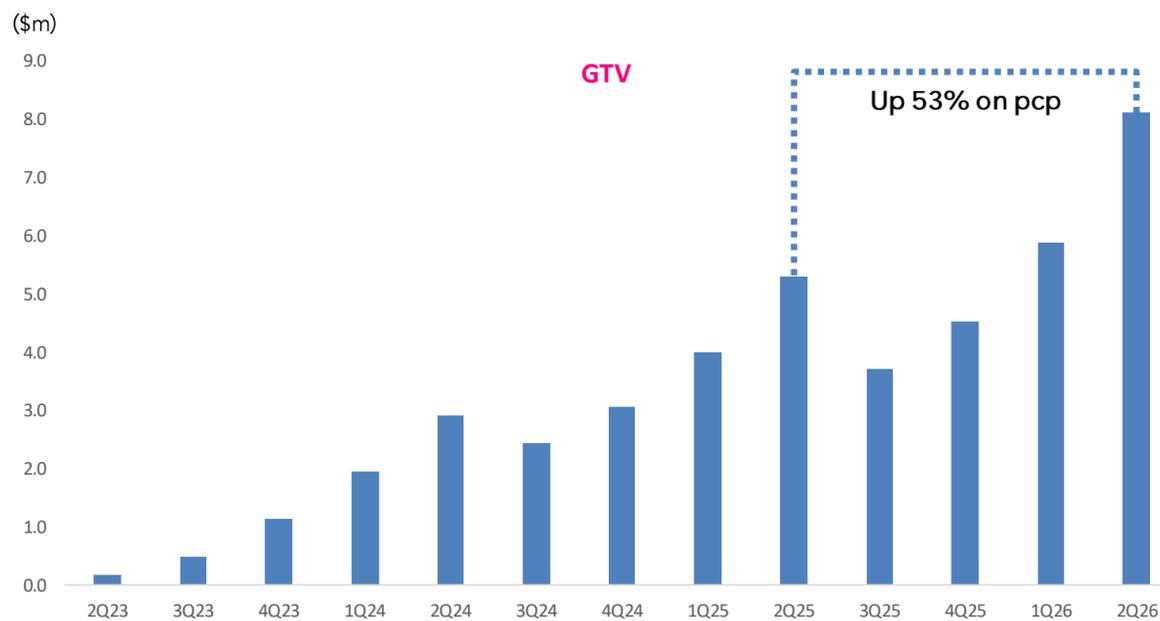
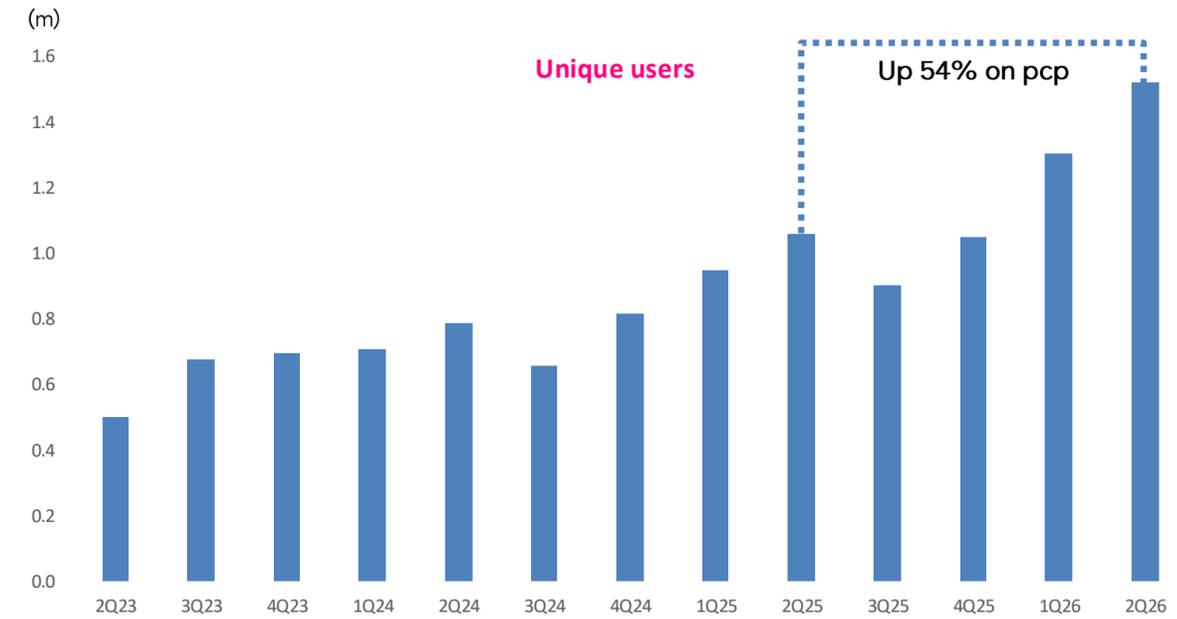
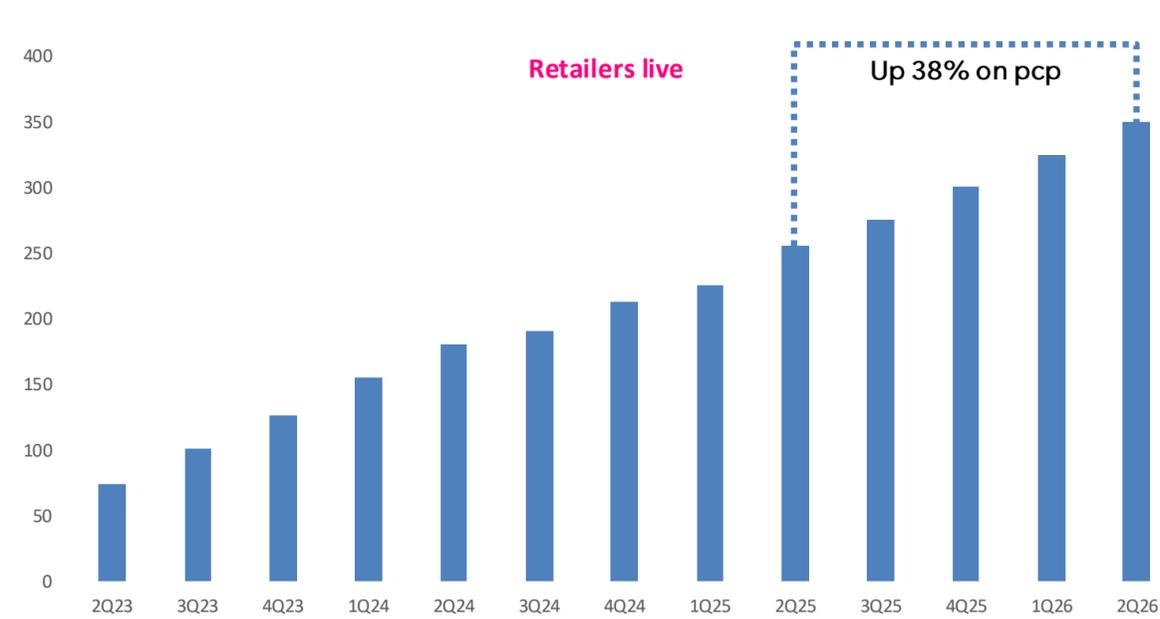
Consolidating multiple sites for operating efficiencies and capacity expansion, consistent with strategy

- > Relocating to a 42,000m² supersite in Kemps Creek, Western Sydney
- > The benefits of the new supersite are expected to include:
 - Avoidance of an additional \$3.1m pa in rental cost increases;
 - Operating efficiencies including consolidation of leases, common operational functions such as despatch and receiving, reduced handover costs as well as reduced external labour hire and overtime
 - Additional space to accommodate further expansion, particularly in packaging; and
 - More fit-for-purpose and modern working conditions for staff.
- > Business units being relocated to the Kemps Creek supersite include:
 - Commercial Print & Packaging - from Silverwater;
 - Brand Activations - from Granville;
 - CX & Data - from Homebush; and
 - Paper storage (for Print Web Offset) - from Warwick Farm.
- > Construction complete and fit out well advanced - relocation to commence in April 2026
- > New presses and finishing equipment to support packaging capacity expansion are on site with installation and commissioning on track



> Lasoo...record retailer and user growth... delivering outsized growth in GTV¹ and repeat customer sales

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1. Gross transaction value

Catalogues driving real returns

Changing Consumer Behaviour = Retail Opportunity

Behaviour

Consumers are more selective, value-led and intentional

Channel

Physical stores matter as trusted connection points

Media Impact

Catalogues drive higher scan sales, visit frequency and spend

Opportunity

Retailers can further enhance catalogue content strategy

Stores with letterbox catalogue distribution significantly outperform stores with in-store catalogue copies only

+2.5%

Incremental grocery scan sales uplift

Circana weekly Scan Data 2025

+3.0%

YoY increase in net foot traffic

Lumos Case Study, 2025

+1.3%

Customer growth

Westpac Data X, A/B Testing 2025

+1.2%

Total average weekly spend

Westpac Data X, A/B Testing 2025

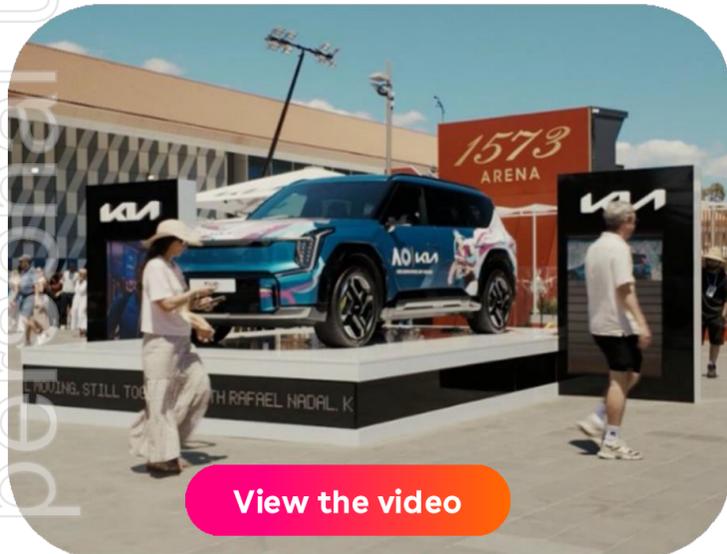
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> Events

Events is emerging as a standalone value proposition and target market leveraging unique capabilities across Brand Activations, Creative & Content and Merchandise & Apparel

- > Events originated as a specialty area within Brand Activations
- > Growth in the size, complexity and holistic marketing demands of major events has seen IVE's Events business offering attractive revenue growth prospects across multiple businesses
- > Major events undertaken by IVE include the 2018 Gold Coast Commonwealth Games, the 2022 FINA World Swimming Championships, the 2023 Women's World Cup, all major Tennis Australia tournaments including the 2024, 2025 and 2026 Australian Open
- > Major upcoming events include the 2027 Men's Rugby World Cup (RFP in progress), the 2027 Australian Grand Prix (RFP in progress), the 2027 Women's Netball World Cup, Women's 2029 Rugby World Cup and the 2032 Brisbane Olympic Games
- > IVE's merchandising business complements the Events business - the Group has licensing agreements to supply merchandise and apparel for Football Australia, Rugby Australia, the NFL and the AFC Women's Asia Cup



[View the video](#)

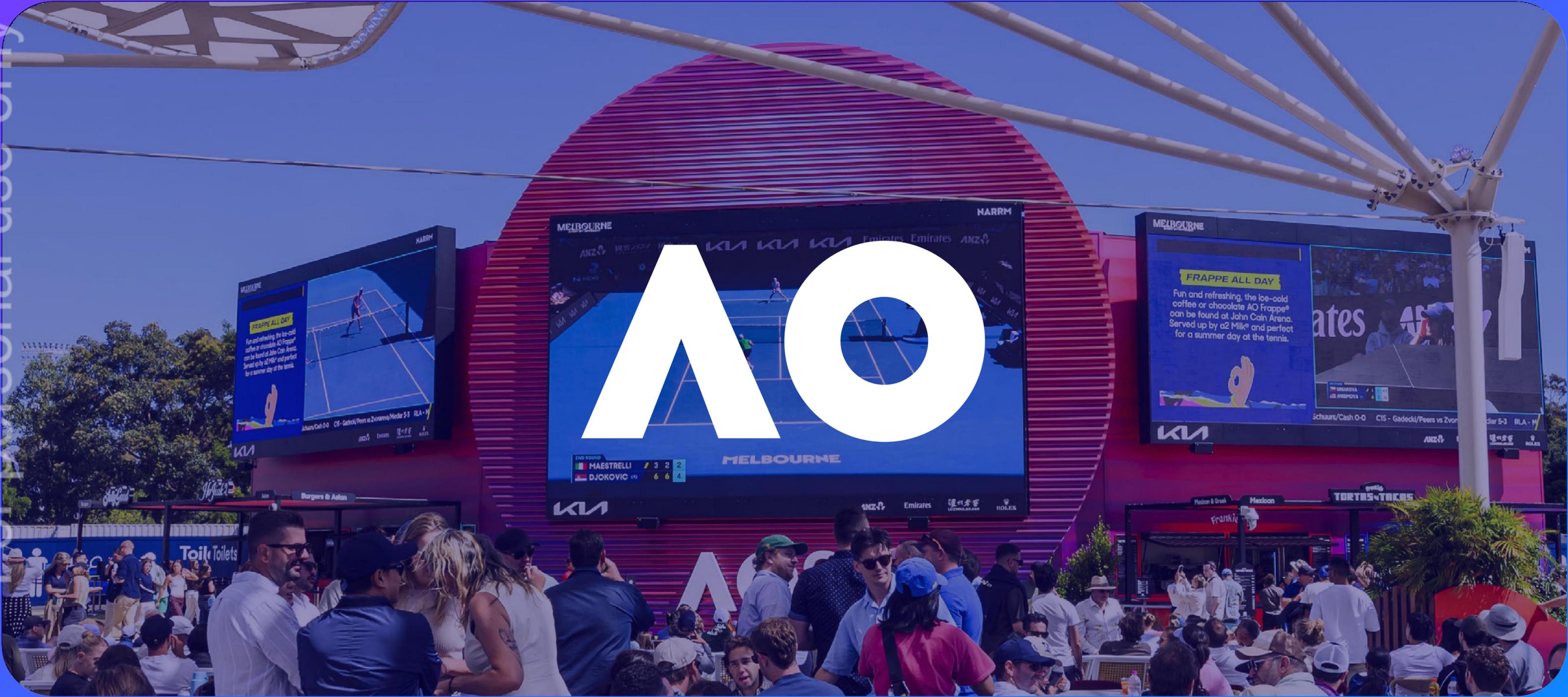


> Events - AO spotlight

- > The 2026 Australian Open showcased IVE's Event capabilities with a brief to deliver a world-class, immersive experience across Melbourne Park that elevated the event environment, engaged fans on-site and on-screen, and brought partner brands to life
- > IVE transformed Melbourne Park into a cohesive, high-energy, festival-style environment:
 - Created and installed premium architectural design work;
 - Developed high-impact, durable signage for day and night sessions;
 - Delivered consistent brand storytelling across multiple zones;
 - Brought to life KIA's AO activation - see video link middle left; and
 - Produced and installed a full suite of assets from the iconic, highly photographed Grand Slam Oval signage to a sea of colourful spectator deckchairs, vivid stair decals and clear wayfinding
- > As a result, the precinct came to life with bold, photogenic moments that amplified the event's identity, improved crowd flow and lifted the spectator experience



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> 'Now to 2030' – acquisition initiatives



> Impressu

IVE acquired Impressu for \$13.5m and signed a long-term marketing agreement with Domino's Pizza Enterprises (DPE)

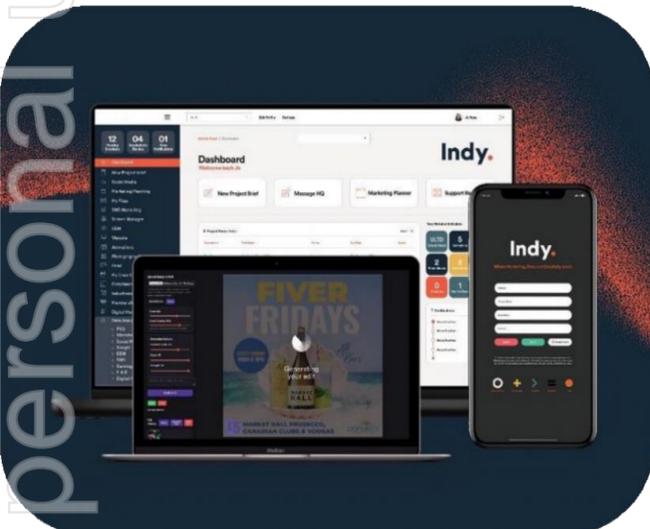
- > Impressu is a Brisbane-based print business providing digital and offset print, direct mail and letterbox marketing, signage and point-of-sale, warehousing and logistics solutions
- > Longstanding clients mainly span the quick service restaurant, retail, healthcare and public sectors with its largest customer representing the vendor, DPE
- > Impressu is initially expected to contribute annual revenue of around \$30m, EBITDA of around \$4.5m (including cost synergies)
- > The acquisition was effective 4 November 2025
- > In conjunction with acquiring Impressu, IVE has signed a 6-year (+2) marketing services agreement with DPE for the continued supply of existing services provided by Impressu as well as expanding those services into IVE's other core capabilities including Creative & Content, CX & Data, Brand Activations, Events Uniforms and more
- > IVE expects this contract to contribute more than \$80m of revenue during the initial 6-year term (including existing DPE revenues generated by Impressu)

> Budget Mail Services (BMS)

IVE acquired Budget Mail Services (BMS) for \$1m (cash and liabilities)

- > BMS is a small Sydney-based mail and communications business supporting clients in the share registry, charity, publishing and education sectors
- > BMS has annual revenue of around \$5m
- > Once fully integrated, BMS is expected to deliver annual EBITDA of \$1m
- > BMS was acquired for \$1m of consideration (a combination of cash and liabilities assumed) effective 3 November 2025
- > BMS is already fully integrated into the Group's CX & Data operations
- > Integration costs were ~\$0.5m





> Daily Press

IVE acquired Daily Press for total consideration of up to \$35m

- > Daily Press is an Australian-based creative agency specialising in digital, social media and performance marketing
- > Advances IVE's ambition to create a truly omni-channel value proposition by further strengthening IVE's existing creative and content capabilities while adding depth in social and performance marketing as well as technology platforms
- > Daily Press was acquired effective 31 December 2025:
 - \$25m paid in cash on completion;
 - up to \$8m payable in deferred consideration subject to performance hurdles over calendar years 2026 and 2027; and
 - up to a further \$2m in deferred consideration (up to \$1m over calendar years 2026 and 2027) subject to stretch performance targets
- > Daily Press will be integrated into the Group's Creative, Content and Integrated Solutions division and will relocate to IVE's Sydney Head Office premises later in 2026, to leverage combined scale, capability and operating efficiencies
- > IVE expects to unlock annual cost synergies of ~\$1m via the in-sourcing of print, distribution and activation services currently outsourced by Daily Press, with further revenue and cross-sell synergies expected as creative-led engagements flow across the Group's broader production platform
- > Once fully integrated, Daily Press is expected to deliver annual revenue and EBITDA of approximately \$23m and \$6.5m respectively

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> FY26 outlook and guidance

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> FY26 outlook and guidance¹

- > Capital expenditure expectations are broadly unchanged at ~\$45m (net of disposal proceeds)
- > Net debt at 30 June 2026 is expected to be below 1.5x pre-AASB 16 EBITDA (<1.2x post-AASB 16 EBITDA)
- > As foreshadowed at the 2025 AGM, while IVE's FY26 annual dividend is expected to remain steady at 18.0¢ps, thereafter the Board intends returning to a dividend payout ratio based on 55%-65% of underlying earnings
- > Underlying NPAT is expected to be around \$50m², excluding the expected favourable net impact of recent acquisitions
- > Excluding non-cash AASB 16 lease impacts, guidance is around \$52.5m², which compares with the FY25 result of \$51.0m on the same basis
- > In calendar 2025, IVE undertook an on-market buyback (of 'up to \$10m') which resulted in the cancellation of ~1.7m shares or 1.1% of issued capital for total consideration of \$4.3m at an average cost of \$2.53ps
- > Although not active in the market since late October 2025, the Group intends reinstating the buyback³ after obtaining the requisite regulatory approvals

1. Outlook and guidance is subject to risks as outlined in the Risk Management Framework on pages 56-57 of IVE Group Limited's 2025 Annual Report
2. Consistent with previous treatment, underlying NPAT excludes:
 - a. an expected Lasoo operating loss of ~\$4m post-tax (in line with FY25 with a significant improvement expected in FY27);
 - b. abnormal costs of ~\$10m post-tax primarily associated with the Dandenong and Kemps Creek relocations; and
 - c. the expected favourable net impact of recent acquisitions
3. IVE may vary, suspend or terminate the on-market buyback based on its view of prevailing market conditions, capital management requirements and other factors that may affect shareholder interests

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> Appendices

> Appendix A

IFRS Profit and Loss	\$m	1H FY25 \$m	Variance %
Revenue	479.1	510.2	(6.1)
Material profit	243.2	247.5	(1.7)
% of revenue	50.8%	48.5%	4.7
EBITDA	70.5	71.0	(0.7)
% of revenue	14.7%	13.9%	5.9
Depreciation and amortisation	26.6	23.5	13.2
EBIT	43.9	47.5	(7.6)
Net finance costs	7.9	8.4	(5.4)
NPBT	35.9	39.1	(8.1)
Income tax expense	11.6	12.0	(3.4)
NPAT	24.3	27.1	(10.2)
% of revenue	5.1%	5.3%	(4.1)
NPATA	26.3	28.9	(9.1)
% of revenue	5.5%	5.7%	(3.7)
EPS (NPAT) cents	15.8	17.5	(9.7)
EPS (NPATA) cents	17.1	18.7	(8.8)

IFRS to underlying NPAT reconciliation	1H FY26 \$m	1H FY25 \$m
IFRS NPAT	24.3	27.1
Lasoo	3.4	3.2
Restructure/relocation costs	2.3	0.6
Acquisition costs	1.4	-
(Gain)/loss on sale of fixed assets	(1.4)	0.1
Pre-tax non-operating items	5.7	3.9
Tax effect of adjustments ¹	(1.7)	(1.7)
Underlying NPAT (post-AASB 16)	28.4	29.3
Post-tax AASB 16 non-cash lease impact	0.3	(0.3)
Underlying NPAT (pre-AASB 16)	28.7	29.0

1. Tax effect of adjustments also includes difference in effective tax rate between underlying and statutory profit

> Appendix B

Underlying Profit and Loss (Pre-AASB 16) ¹	1H FY26 \$m	1H FY25 \$m	Variance %
Revenue	476.5	507.8	(6.2)
Material profit	241.5	246.1	(1.9)
% of revenue	50.7%	48.5%	4.5
EBITDA	58.8	60.2	(2.3)
% of revenue	12.3%	11.9%	4.1
Depreciation and amortisation	12.0	12.2	(1.8)
EBIT	46.8	48.0	(2.4)
Net finance costs	4.7	5.7	(17.7)
NPBT	42.2	42.3	(0.4)
Income tax expense	13.5	13.3	0.9
NPAT	28.7	29.0	(1.0)
% of revenue	6.0%	5.7%	5.5
NPATA	30.7	30.8	(0.6)
% of revenue	6.4%	6.1%	5.5
EPS (NPAT) cents	18.6	18.8	(0.6)
EPS (NPATA) cents	19.9	19.9	(0.3)

1. Excludes adverse post-tax non-cash AASB 16 timing difference driven by significant new long-term property leases that will reverse over the life of the leases

> Appendix C

IVE Group Limited Balance Sheet	1H FY26 \$m	FY25 \$m
Current Assets		
Cash and cash equivalents	50.2	50.1
Trade receivables, prepayments and other	168.9	141.2
Inventories	75.4	79.2
Total Current Assets	294.5	270.5
Non-Current Assets		
Deferred tax assets	17.2	18.9
Property, plant and equipment	137.6	119.1
Property, plant and equipment (ROUA)	135.1	103.8
Intangible assets and goodwill	195.4	151.4
Other	0.3	0.2
Total Non-Current Assets	485.5	393.4
Total Assets	780.0	663.9
Current Liabilities		
Trade payables and provisions	162.9	154.7
Loans and borrowings	3.0	0.8
Lease liability (ROUA)	36.4	28.9
Current tax payable	6.6	12.4
Total Current Liabilities	208.9	196.8
Non-Current Liabilities		
Trade payables and provisions	22.9	11.7
Loans and borrowings	215.8	159.1
Lease liability (ROUA)	110.0	83.6
Total Non-Current Liabilities	348.7	254.4
Total Liabilities	557.5	451.2
Net Assets	222.5	212.7
Equity		
Share capital	163.4	166.1
Reserves	6.1	4.8
Retained earnings	53.0	41.8
Total Equity	222.5	212.7

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No recommendation, offer, invitation or advice

This presentation contains general information about the activities of IVE Group Limited (IVE) which is current as at 31 December 2025. It is in summary form and does not purport to be complete. It presents financial information on both a statutory basis (prepared in accordance with Australian accounting standards which comply with International Financial Reporting Standards (IFRS) as well as information provided on a non-IFRS basis.

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