



1H FY26 Results

26 February 2026

AI-Media Technologies (ASX: AIM)
AI-Powered Language Infrastructure



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Investor Centre

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In the past 6 months, AIM crossed a key structural threshold in achieving our key goal of reaching 80% technology revenue in December 2025

The LEXI suite powered 80% ARR growth vs a guidance of 35%

Investment into development of new 2026 Encoder products is due for market release in 2H26, coinciding with the launch of our Hardware as a Service (HaaS) sales commercial model. The result is a simpler, more predictable business - infrastructure-led, hardware-enabled, and recurring by design

AIM's singular focus is now the responsible and profitable scaling of ARR, while maintaining 80%+ gross margins

Tony Abrahams, Co-Founder, CEO



**Tony
Abrahams**

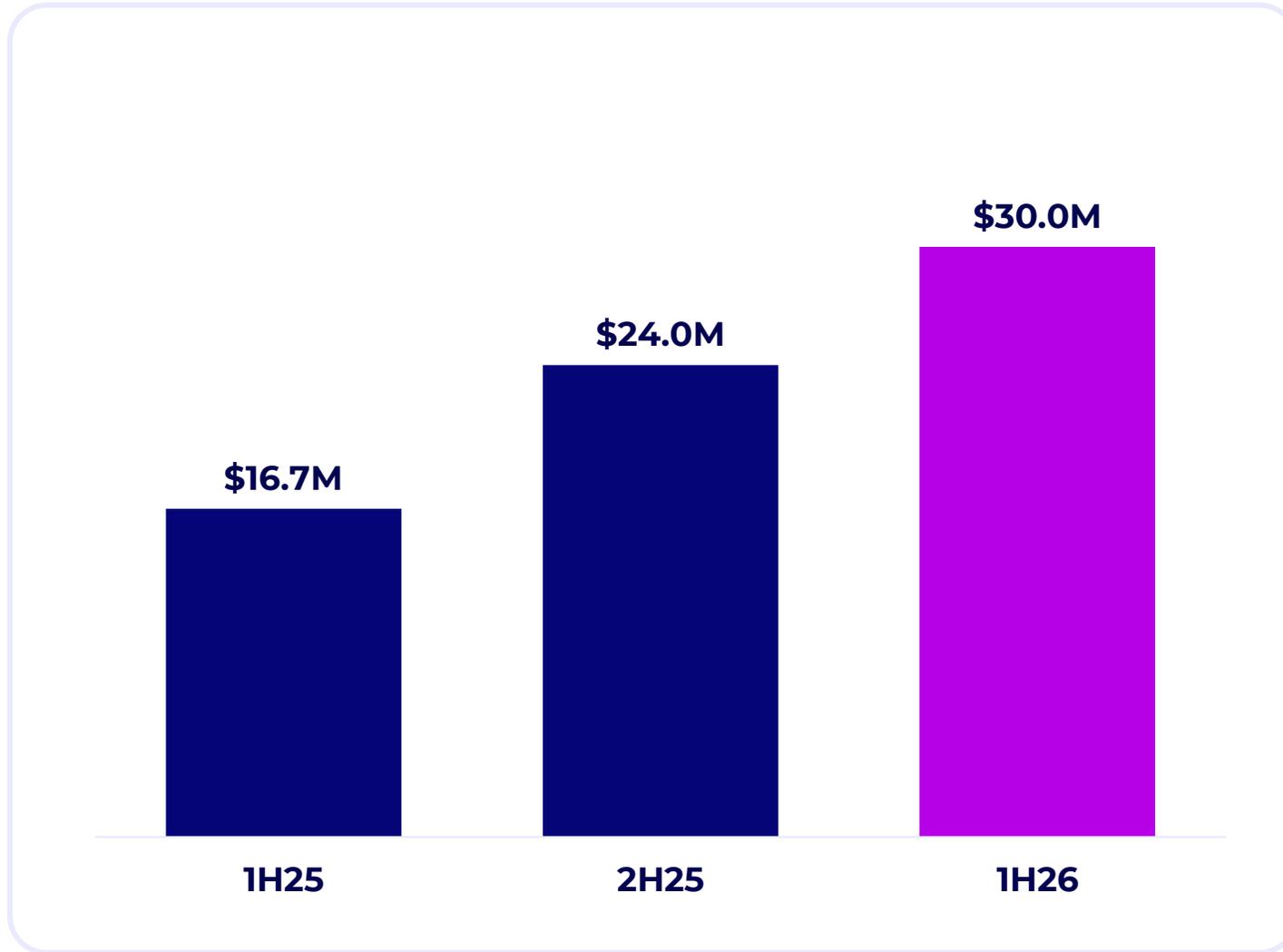
**Co-founder, CEO &
Shareholder (18%)**



**Jason
Singh**

Chief Financial Officer

Annual Recurring Revenue (ARR) growth +80%



\$30M
1H26 ARR

84%
ARR Gross Margin

+80%
ARR growth on pcp

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1H26 Financial Performance



ARR¹

\$30.0M

↑ 80%

(1H25 : \$16.7M)

Total Revenue

\$29.8M

↓ 6%

(1H25 : \$31.8M)

Tech Revenue²

\$21.1M

↑ 12%

(1H25 : \$18.9M)

Services Revenue

\$8.7M

↓ 33%

(1H25 : \$12.9M)

Cash Balance

\$16.7M

↑ \$2.0M

(1H25 : \$14.7)

Total Gross Margin

70%

↑ 3%

(1H25 : 67%)

Adjusted EBITDA

(\$0.4M)

↓ 159%

(1H25 : \$0.7M)

Product and R&D

\$5.1M

↑ 38%

(1H25 : \$3.7M)

1H26 vs 1H21 tells the story of technology and ARR transition

	1H21 (\$M)	1H26 (\$M)	Growth %
Revenue	22.9	29.8	30%
Gross Profit	8.8	20.8	136%
<i>Gross Margin %</i>	38%	70%	
Sales & Marketing	(5.8)	(7.3)	26%
G&A	(7.8)	(10.1)	29%
Product Development	(2.2)	(5.1)	133%
EBITDA	(7.0)	(1.7)	75%
Adjusted EBITDA	(3.8)	(0.4)	89%
Free Cash Flows	(15.5)	2.4	116%
LEXI Volume delivered (minutes)	3.9	54.0	1287%

Revenue +30% to \$29.8m, reflecting successful transition to a higher quality recurring ARR model.

Gross margin expanded to 70% demonstrating structural shift to a scalable technology led platform.

Adjusted EBITDA loss reduced 89% showing strong operating leverage while continuing to invest in growth.

Free Cash Flows turned positive (+\$2.4m), marking a clear inflection to a cash generating business.

LEXI minutes up 1,287% to 54m, validating technology adoption and underpinning future margin and ARR expansion.

AIM Infrastructure adds AI elements to Live Video

AIM is the leader in live professional workflow orchestration and automation adding AI elements in text and voice translation



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1

Capture Video



2

Secure Ingest



3

AI Automation



4

Enhanced Video Output



Step 1 – Capture
Video input fed directly to AIM Encoders

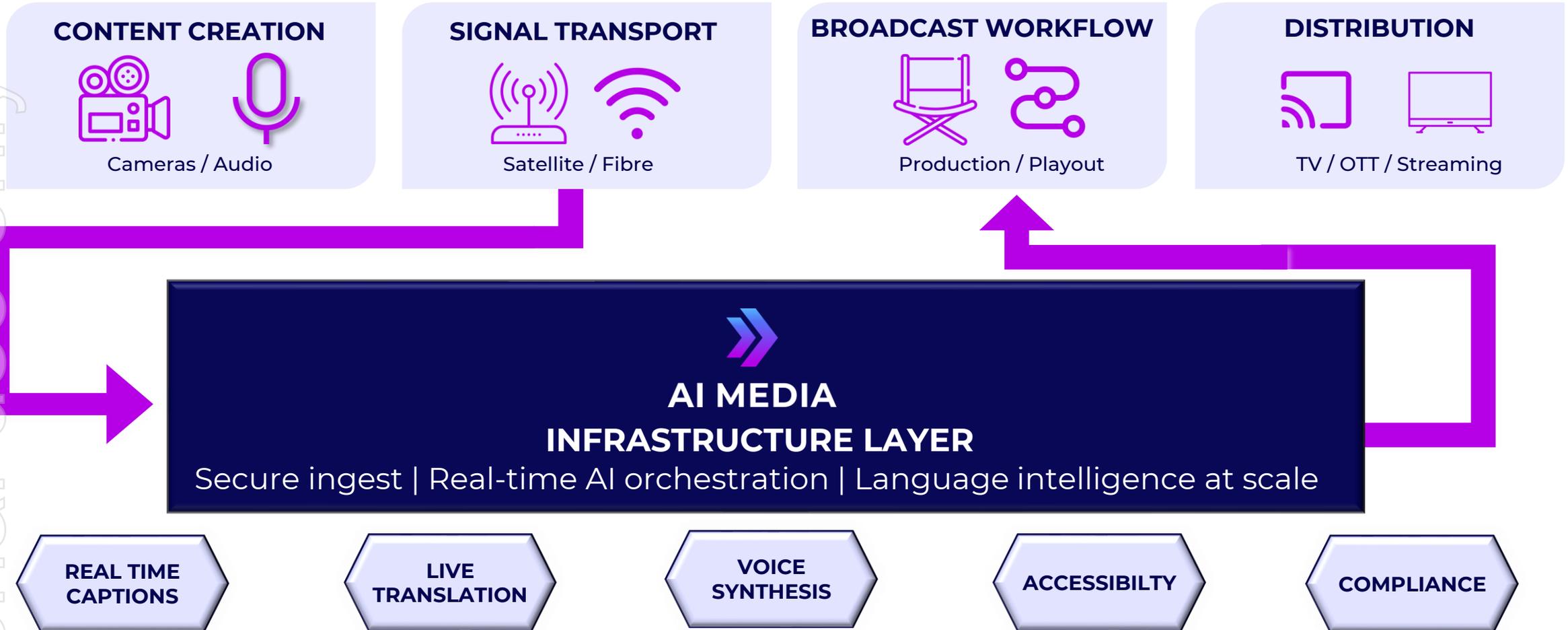
Step 2 – Ingest
Encoders securely receive all source data from approved customer systems

Step 3 – LEXI Automation
iCap platform, and LEXI orchestrate media with AI for optimal output

Step 4 – Enhance
LEXI adds **AI captions, translation, and Voice** to final video

AIM - The Infrastructure Layer of Live Video Distribution

AIM's live broadcast ecosystem uses hardware, software and integration layers to deliver fast, accurate reliable AI elements



LIVE MEDIA ENTERS AIM, IS **ENRICHED IN REAL TIME**, AND RETURNS TO THE BROADCAST CHAIN ENHANCED



AI MEDIA

AI-Media Ecosystem



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How AIM's solutions differ from Consumer AI

AIM's customers need live language accessibility in high-trust, professional-grade and regulated environments

Consumer AI Products



- ❓ Uncertain translation at the destination
- ❓ Does not use real time topic modelling
- ❓ Best-effort, probabilistic
- ❓ No regulatory exposure
- ❓ Failure is tolerable
- ❓ No audit trail

AIM | LEXI

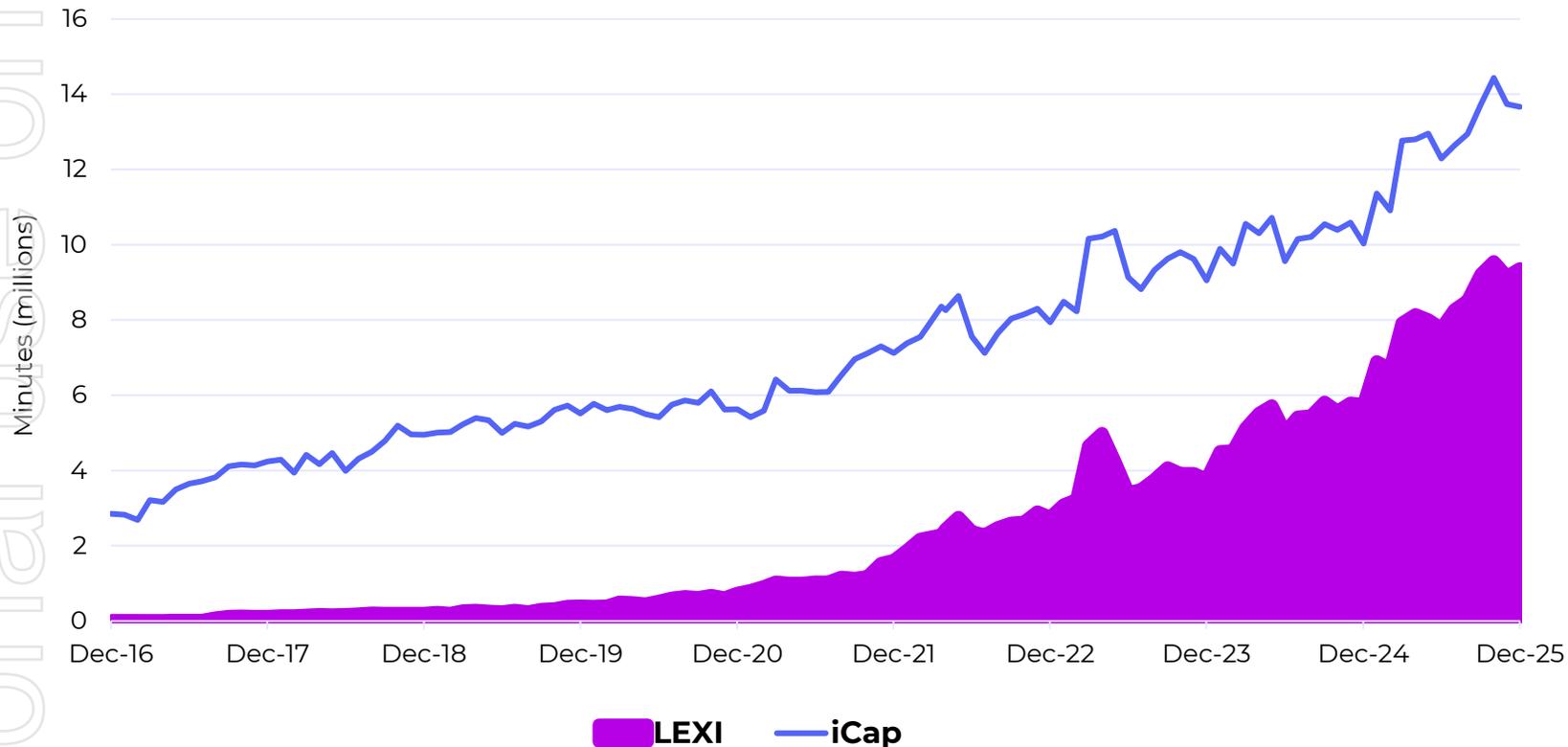


- ✅ Translates at the source (same for everyone)
- ✅ Real time topic modelling frame accurate
- ✅ Deterministic, consistent output
- ✅ Regulatory, contractual, reputational liability
- ✅ Failure has legal and financial consequences
- ✅ Full auditability & compliance

LEXI SaaS drives majority of iCap network usage in 1H26

Supported by growth in AIM's LEXI SaaS product suite from new and existing clients

Scaling iCap and LEXI
(millions of minutes processed per month)



- LEXI usage (tech) 5-yr CAGR: **+66.4%**
- LEXI Share of iCap network grows with AI improvements: **11% (1H21) → 68.5% (1H26)**
- iCap network (human + tech) 5-yr CAGR: **+19.4%**

AI-Media's B2B customers and markets at a glance

World leading brands choose AIM to add AI elements of TEXT, VOICE and LLM-AI via AIM Encoder network (LEXI over iCap)



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KEY SOLUTIONS

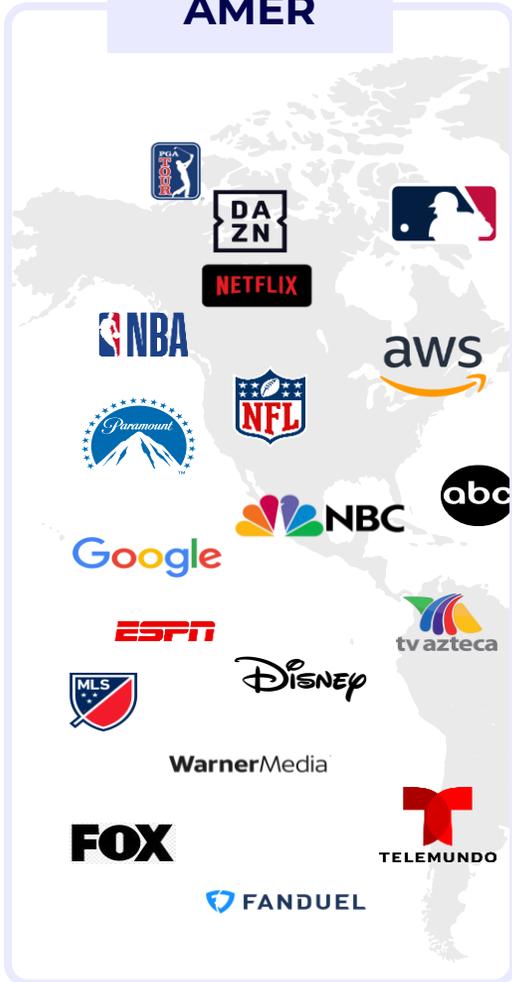
LEXI
ENCODERS

LEXI
TEXT

LEXI
VOICE

LEXI
AI

AMER



EMEA



APAC



CORE SEGMENTS

Broadcast
73% of 1H26 revenue

Government
7% of 1H26 revenue

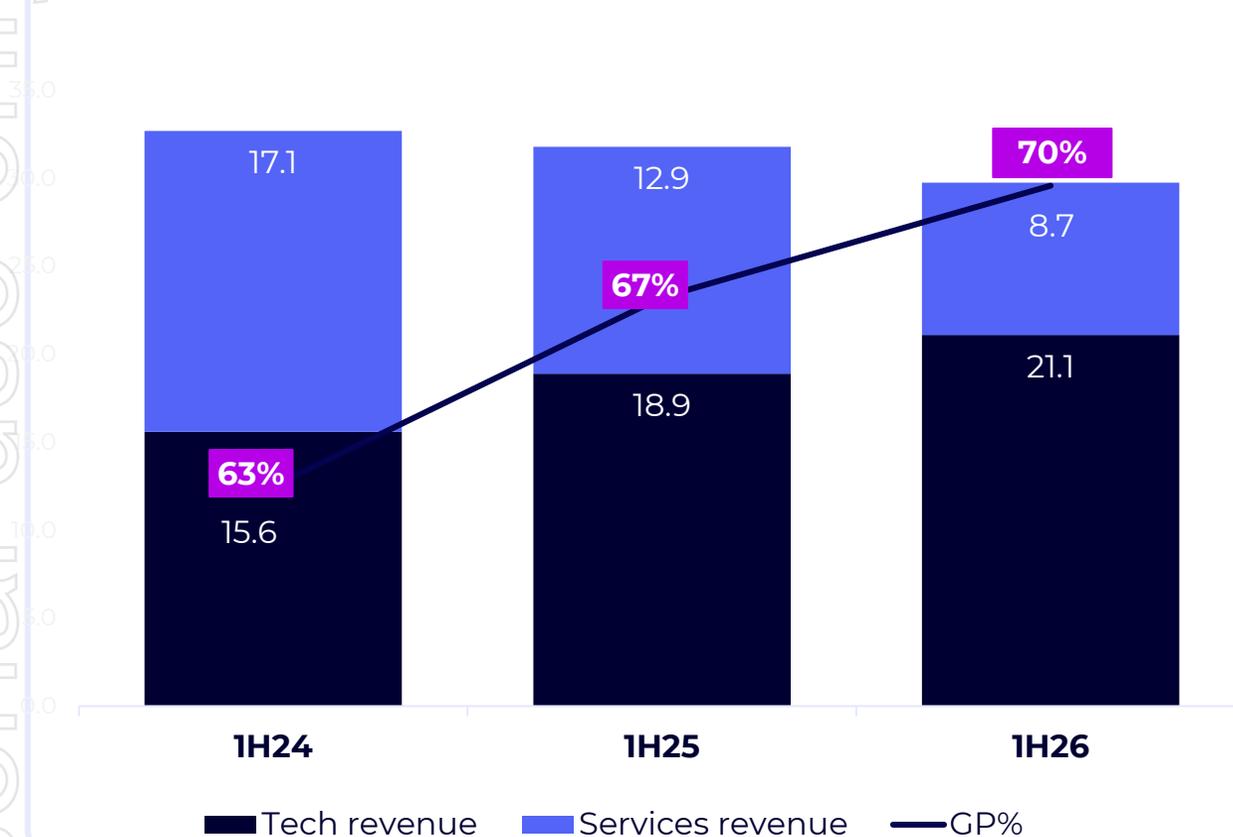
Enterprise
20% of 1H26 revenue

1H26 Tech revenue mix 71%, driving GM up to 70%

Underpinned by an increased portion of revenue derived from Tech at 84% gross margin



Transition to Tech Revenue (\$M)



- Legacy Services Revenue decline accelerated (-25% 1H25 → -33% 1H26)
- Services **20%** of Total Revenue at Dec 2025
- Tech Revenue **+12%** YoY including **SaaS +61% YoY** and Hardware **-46%**
- **84%** Gross Margin from Tech, lifting blended 1H26 GM to **70%**

Continuous Innovation: Leadership to AI Platform Scale

Decades of execution underpin our transition from broadcast infrastructure to scalable AI-powered services



1981

Production of first caption encoder

1996

Launch of first digital SDI caption encoder

2001

Launch of EN530, the first HD CEA-708 closed caption encoder

2007

iCap network launched

2016

Launch of Alta: Entry into IP

2017

LEXI Text - Automatic Captions launched

2021

EEG Acquisition

2023

LEXI captioning surpasses human accuracy

2025

Release of LEXI Voice live AI translation/subtitling

2026

LEXI AI in development

1. Foundation

(1981-2006)

Broadcast Hardware Leadership

- ✓ Pioneered closed caption encoding
- ✓ First digital SDI caption encoder
- ✓ Trusted at broadcast scale

2. Connectivity

(2007-2017)

Network + Workflow Transformation

- ✓ Platform-ready encoder architecture
- ✓ iCap network launched
- ✓ Entry into IP video encoding
- ✓ Created the foundation for cloud

3. Scale

(2018-Present)
Acquisition of EEG: 2021

AI + SaaS Expansion

- ✓ LEXI Text launched
- ✓ LEXI accuracy surpasses human
- ✓ Expanded AI product suite
- ✓ New encoder innovation
- ✓ Recurring Revenue Expansion

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1H FY26 Financial Highlights

1H26 Investment highlights

Key Metrics driving sales growth and profitability



Tech Momentum

- **71%** 1HFY26 Revenue from Tech
- SaaS revenue **61%** increase
- **84%** Gross Margin from Tech



ARR Growth Drivers

- **\$30.0M** ARR, **84%** gross margin, **+80%** growth over 1H25
- Encoder base 7,948 units, with 5,152 units over 3 years old
- HaaS model to accelerate replacement cycle and build ARR



Strong Financials & Tailwinds

- Cash balance **+14%** to **\$16.7M**, positive operating cash flow
- All product & R&D expensed **\$5.1M**, not capitalized



Operational Leverage

- Legacy infrastructure shutdown on time on budget (Dec 2025)
- Support as a Service will contribute to drive ARR
- Long term customer base – with **no churn in top 20 customers over 5 years**

Attractive technology-driven recurring revenue model

Model supports growth with stronger margins, while delivering higher long-term customer value



Products & Support (~80%)

Encoders	LEXI	Support
Hardware	Software	Maintenance & Upgrades
<ul style="list-style-type: none"> • Upfront One-off (existing model) • HaaS¹ Recurring (2H26) 	<p>SaaS Recurring</p>	<p>Recurring</p>
<ul style="list-style-type: none"> • Upfront One-off (existing model) • HaaS¹ licence fees turns into a monthly recurring billing cycle 	<ul style="list-style-type: none"> • Upfront annual fee • Monthly usage caps within contract pricing • Discounted for bundles on multiple LEXI products 	<ul style="list-style-type: none"> • Fee for service • Built into contracts at customer's request • Tiered Model

Services (~20%)

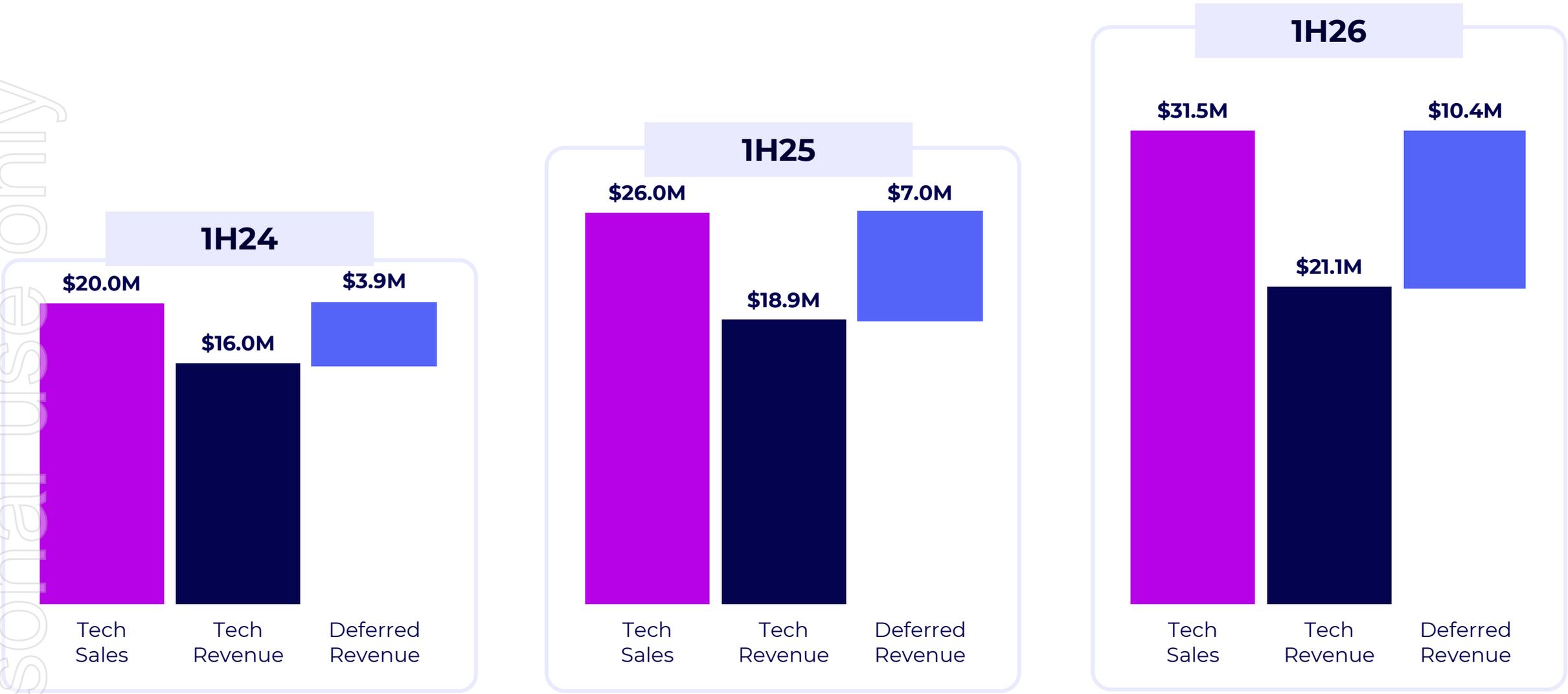
Professional
Implementation
<p>Upfront One-off</p>
<ul style="list-style-type: none"> • Fixed price • AIM engineers support integration with customers existing systems

ARR transition has accelerated Tech sales

The Services to LEXI model improves cashflow whilst delivering a superior product proposition



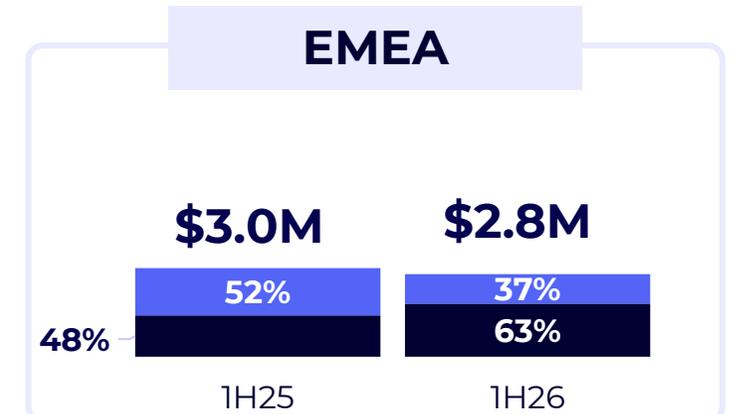
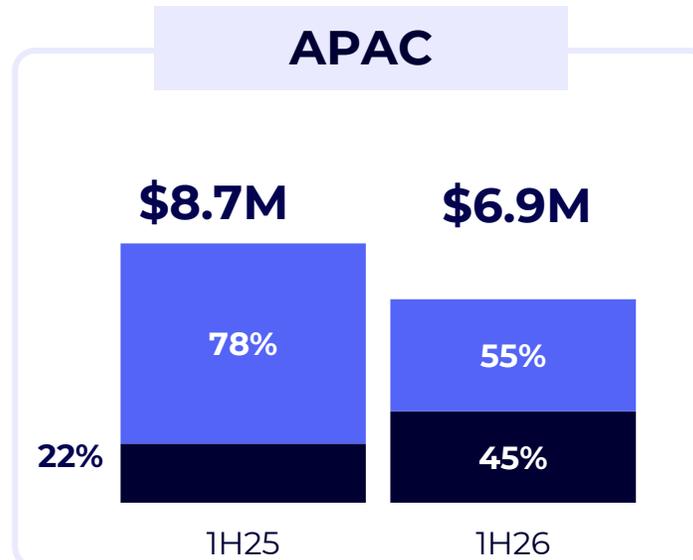
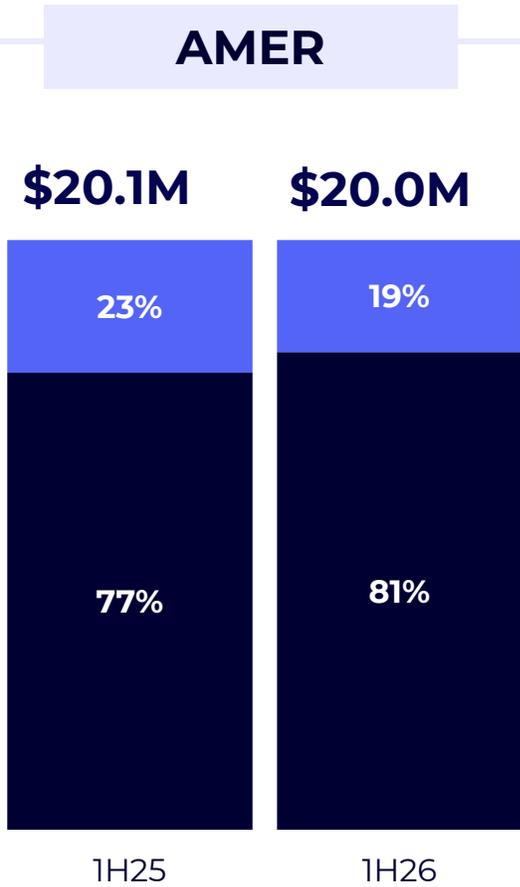
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Tech revenue now represents 80% of total revenue



Future Services revenue related to project & implementation fees supporting tech revenue.

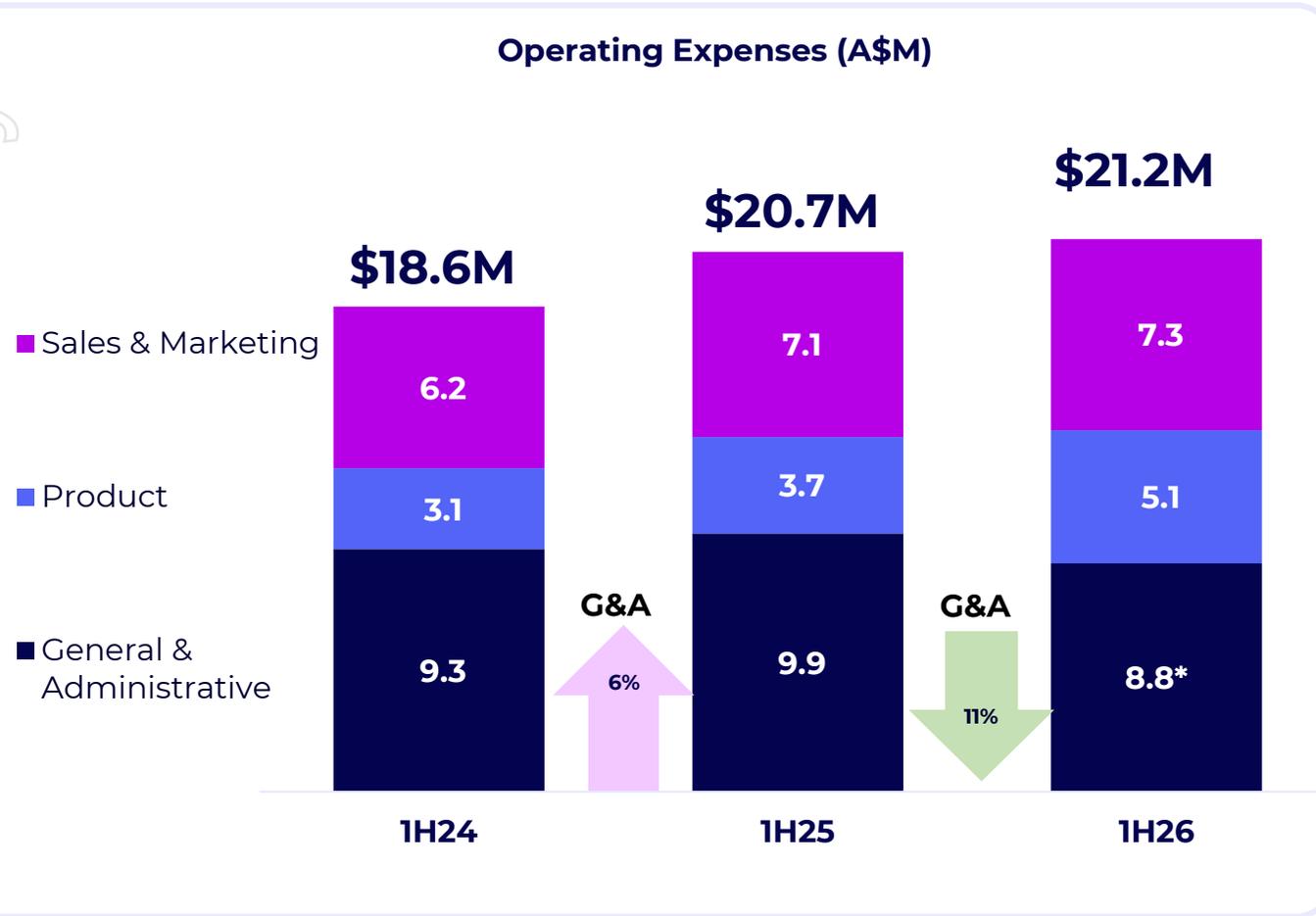


■ Tech Revenue ■ Services Revenue

Product & sales driving ARR growth



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- **Sales investment up 3%**
- **Product investment up 38%**
All R&D and Product development is expensed when incurred - not capitalized (1HFY26=\$5.1M, representing 17% of total revenue)
- **General & Administrative down 11%**

* Excludes \$1.3m Non-Cash SBP

1H26 Summary profit and loss

A\$M	1H26	1H25	Variance	Growth %
Tech revenue	21.1	18.9	2.2	12%
SaaS	16.4	10.2	6.2	61%
Hardware	4.7	8.7	(4.0)	(46%)
Services revenue	8.7	12.9	(4.2)	(33%)
Total revenue	29.8	31.8	(2.0)	(6%)
Tech gross profit	17.7	14.9	2.8	19%
Services gross profit	3.0	6.5	(3.5)	(53%)
Gross Profit	20.8	21.4	(0.6)	(3%)
GP margin %	70%	67%	3%	3%
Sales & Marketing	7.3	7.1	0.2	3%
Product and R&D	5.1	3.7	1.4	38%
General and Admin*	10.1	9.9	0.2	2%
Total operating expenses	22.5	20.7	1.8	9%
EBITDA	(1.7)	0.7	(2.4)	(349%)
Share based payments	(1.3)	-	(1.3)	(100%)
Adjusted EBITDA	(0.4)	0.7	(1.1)	(159%)
Operating cashflow	2.6	3.4	(0.7)	(21%)
Cash at Bank	16.7	14.7	2.0	14%
Cash Conversion %	650%	479%	(328%)	(328%)

Hardware sales lower ahead of release of new Encoders

Accelerated decline in services revenue of **33%**
Services now represents 20% of total revenue

84% GM from technology revenue, improving overall gross margin by **3%** vs the pcp

The increase reflects planned investment in engineering and product capability with external resources, to support accelerated roadmap delivery in 2H26.

Shortfall driven by lower-hardware revenue, incremental whole of company R&D investment of \$5.1M annualised, to support future growth.

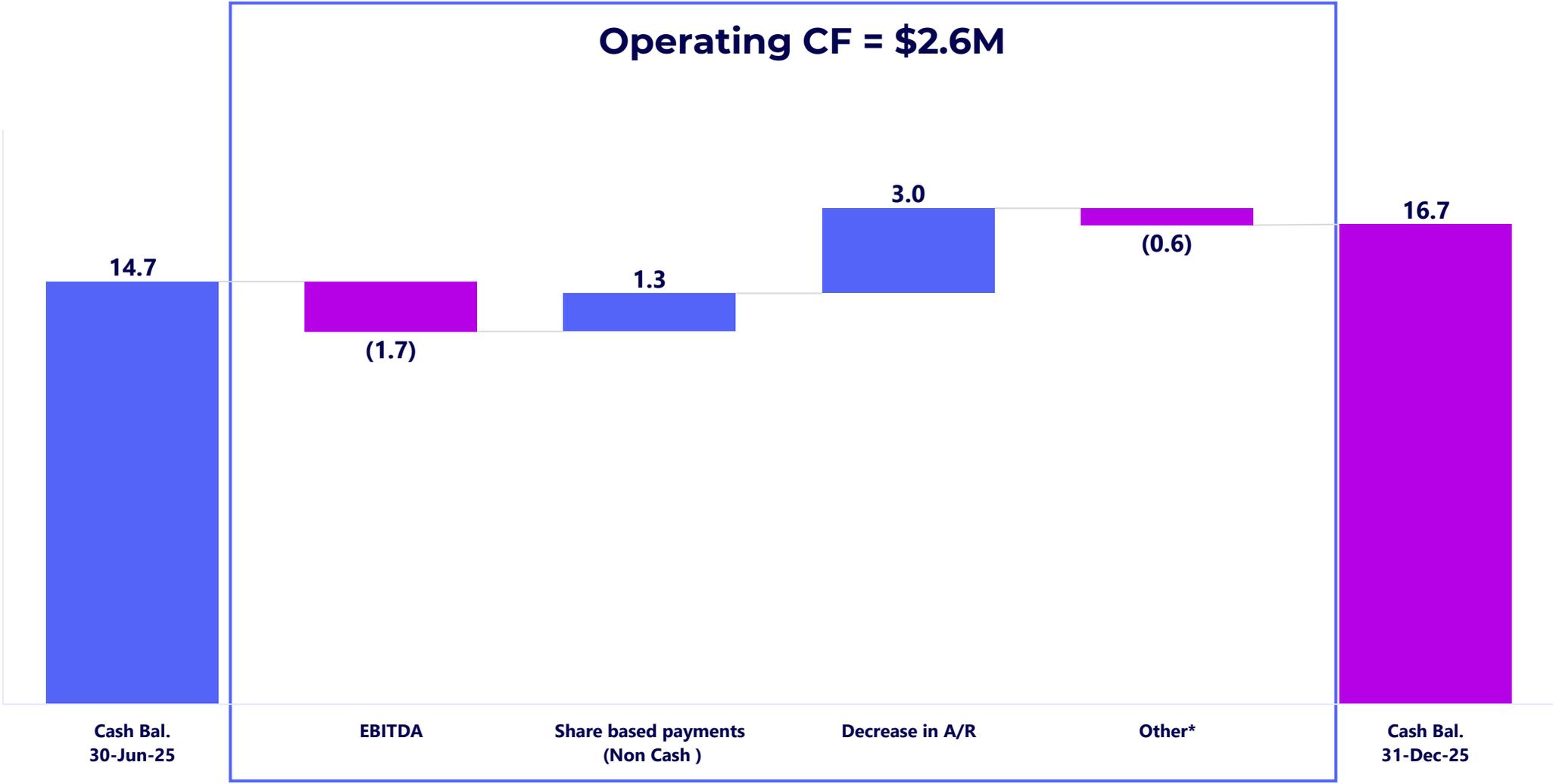
Increase in cash balance was driven by cash collections

* Included Share based payments of \$1.3m.

1H26 Cash increase of \$2.0M



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* Includes: Foreign exchange \$0.2M, Capital expenditure \$0.2M, Other \$0.2M

Manufacturing Capacity & Production Capability



Current Manufacturing Position (FY26)

- **Manufacturing model:** Hybrid (high-volume PCB assembly outsourced; other tasks in-house)
- **Annual production capacity:** 2,500 encoders via internal assembly line; 3,000 with outsourcing of PCB assembly
- **Current utilisation:** 30%
- **Average lead time:** 2 weeks order to ship

Manufacturing/Production Improvements (2025)

- **New hardware introduced:** Yamaha YSM10 (SMT pick-and-place machine)
- **Yield improvements:** 29% reduction in motherboards discarded before incorporation into encoders
- **Process improvements:** 60% reduction in hardware testing time per encoder
- **Expected capacity increase from upgrades:** +50%

Capacity & Scalability

- **Maximum scalable capacity (with planned CapEx):** ~4,000 units per year
- **Time to scale production by 1.5x:** 6 months
- **Key supply chain constraints:** RAM prices and lead times have increased dramatically; motherboard lead times are also substantial
- **Inventory strategy:** Buffer stock (~3 months inventory for most products)

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Growth Strategy & Outlook

Three strategic pillars

We are building strong foundations to drive future growth across different segments and geographies

1

Product Expansion

- Increase product spend with existing customers through LEXI Text and new LEXI Encoders
- Monetizing new offerings such as LEXI Voice and LEXI AI

2

Geographic Penetration

- Replicate North American success and achievements in Europe and Asia
- Leverage regulatory tailwinds such as the European Accessibility Act (EAA)

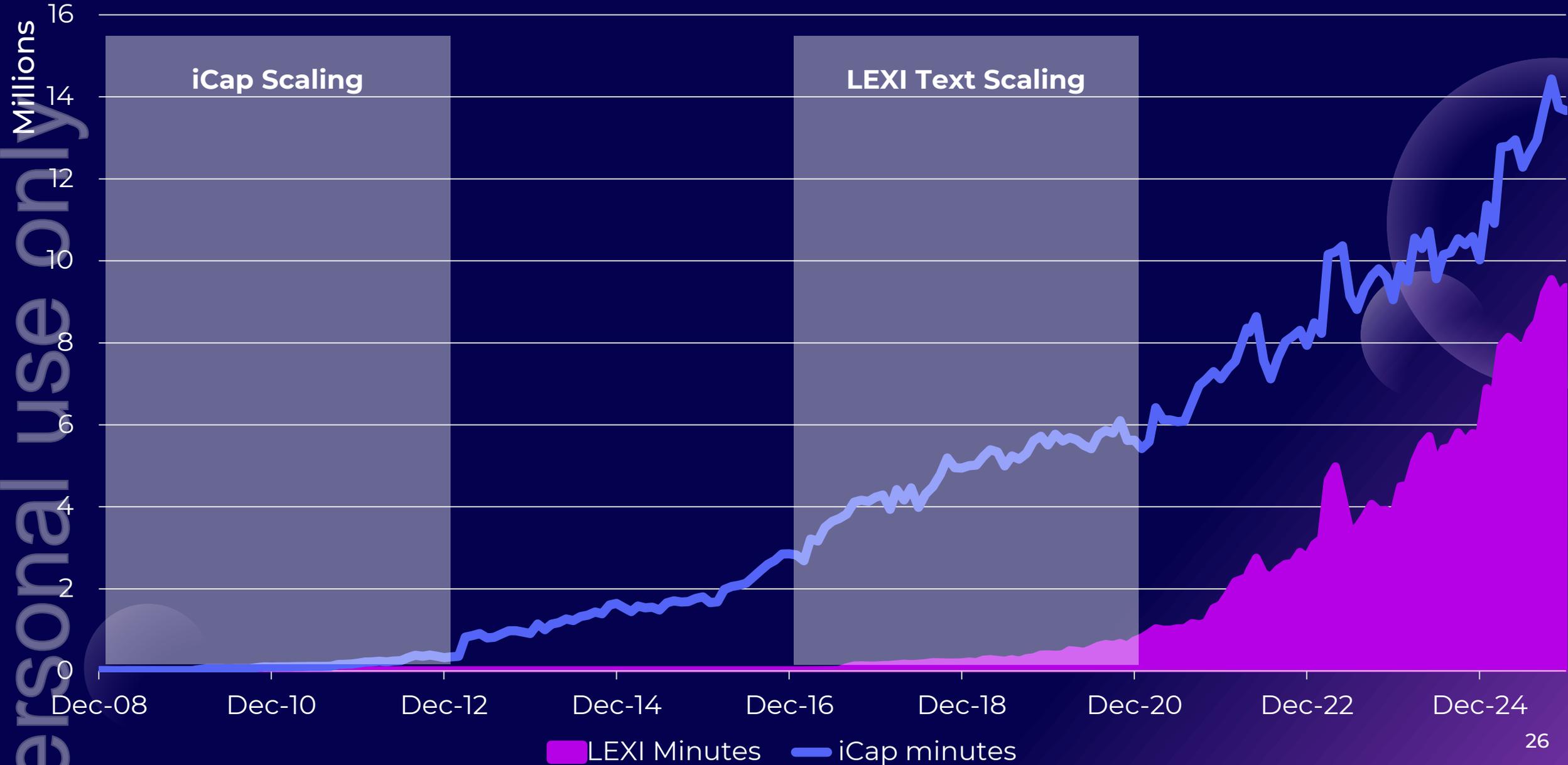
3

Segment Differentiation

- Strengthen position in Enterprise, Education, and Government sectors
- Build on successes within parliamentary and congressional institutions

Scaling iCap and LEXI Text took 4 years each

(millions of minutes processed per month)



LEXI Product Suite driving ARR growth

- Significant investment pre-revenue in flagship products to expand the TAM
- Product development costs are fully expensed when incurred, zero R&D capitalization

only
er's sales



SPECIFICATION

- AI-powered live captioning
- 100% of LEXI revenue today
- Foundation of LEXI Voice & AI

- Live voice interpreting from captions
- 100+ languages in <8 seconds
- Expands broadcaster reach

- Secure enterprise GenAI solutions
- Deploy within proprietary data environments
- Enables advanced AI integration

- Broadcast-grade captioning encoders
- SDI, IP & SRT workflow support
- Optimised for LEXI language solutions

- 24/7/365 global support
- Tiered support options
- Transparent reporting & always-on service

STRATEGY

- Grow iCap market share
- Expand into new regions & verticals
- Drive new customer acquisition

- Scale TAM ~30x vs Text
- Focus on high-value POCs
- Convert strategic broadcast partners

- Launch LEXI AI & Insights (NAB 2026)
- Build enterprise AI pipeline
- Expand product roadmap

- Transition to HaaS model
- Drive ARR for AIM
- Eliminate customer capex barrier

- Launch SUaaS model
- Generate recurring ARR
- Strengthen always-on customer retention

Focusing on '9 Squares' of product-market fit



The core focus areas are distinct in each of the 9 Squares, with EMEA Broadcast and global Enterprise key FY26 growth targets

Broadcast

Government

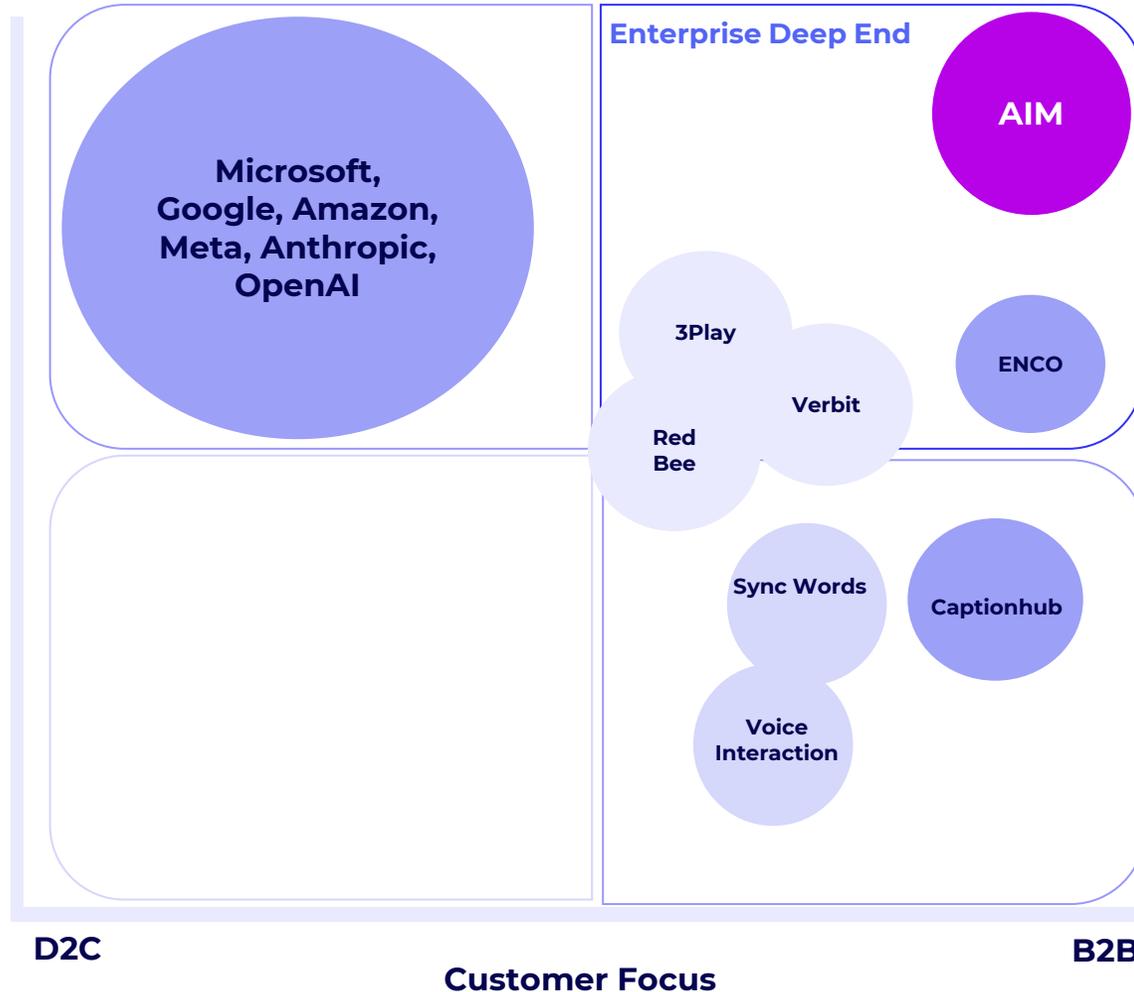
Enterprise

	AMER	EMEA	APAC
	FY26 Objectives	FY26 Objectives	FY26 Objectives
Broadcast	<ul style="list-style-type: none"> Encoder refresh Great Product Market Fit with LEXI Text – continue displacing competitors FY26 LEXI Voice POC Priority 	<ul style="list-style-type: none"> Encoder sales focus LEXI Text (EAA) FY26 LEXI Voice POC Priority 	<ul style="list-style-type: none"> ANZ Broadcasters now full LEXI Win new territories in Asia FY26 LEXI Voice Priority
Government	<ul style="list-style-type: none"> Build on first sales successes in FY25 to US and Canadian government departments Title II ADA opportunity for LEXI AD (Audio Description) 	<ul style="list-style-type: none"> Initial customer pilots 	<ul style="list-style-type: none"> Initial customer pilots
Enterprise	<ul style="list-style-type: none"> FY26 LEXI Text, LEXI Voice Priority 	<ul style="list-style-type: none"> FY26 LEXI Voice POC Priority Switzerland (UN) focus 	<ul style="list-style-type: none"> FY26 LEXI Voice POC Priority

Live Media competitive landscape: We play in the deep end

AIM Integrates best-of-breed AI (Google, XL8, ElevenLabs, DeepL, ChatGPT etc) into secure live enterprise workflows

Technology /
Sophistication /
Integration Depth



- B2B only – Big-tech ‘retail’ offers validate the market; AIM focuses on secure, integrated enterprise workflows
- Integrating the tech you know from Smart Phone - with enterprise-grade security
- AIM’s top-20 customers all > \$1.5B annual revenue = 80% of revenue. Zero churn in this cohort in last 4 years
- Technical capability validated with index customers in each of the ‘9 Squares’ (see next slide)

Investment case summary

Positioning the business for sustained growth, profitability, and market leadership



Transitioned to High Margin ARR



Achieved \$30M in ARR in 1H, which is forecast to grow to 50% PA



Penetration of New Markets with Tech



Successful penetration of US Government and EMEA Broadcast segments with material sales of Encoders



Leveraged AI Advances for Product Growth



Used AI breakthroughs for further growth for LEXI Text, launched LEXI Voice and developing LEXI AI



Reinforced Defensible Moat



We converted commoditized AI into a proprietary, defensible capability with our workflows and live data integration



Expanded TAM From \$2B to \$70B



Expansion into Voice unlocks ~30x Total Addressable Market and a step change in growth potential



Zero Debt, Strong Position



With no debt and a solid balance sheet, AIM is well-positioned to fund growth and pursue strategic opportunities

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Additional Information

CASE STUDY: CNBC MONGOLIA



CHALLENGE / OPPORTUNITY

- Need for Real-Time Translation: CNBC Mongolia required a reliable solution to automatically translate their live financial news broadcast from English to Mongolian.
- Market Opportunity: Currently, no English news station in Mongolia provides Mongolian subtitles. CNBC Mongolia aims to be the first in both Mongolia and the wider CNBC Group to launch live translated broadcasts.

THE SOLUTION

- Hardware: Deployed the HD492 Encoder to handle secure, low-latency video and caption insertion.
- SaaS Workflow: Implemented a "stacked" AI workflow using LEXI Live for high-accuracy English captions, feeding into LEXI Translate for English-to-Mongolian translation.
- Accuracy Tools: Utilized Topic Models to handle financial terminology and Do Not Translate Lists to protect key brand terms

RESULTS

- First broadcaster in Mongolia to offer real-time accurate captions and translations
- CNBC's broadcasts driving greater accessibility and understanding of breaking news and financial information to their audience



Profit & loss statement

For the year ended
31 December 2025

	31-Dec-25 (\$M)	31-Dec-24 (\$M)	Var (\$M)
Revenue	29.8	31.8	(2.0)
Cost of sales	(9.0)	(10.4)	1.4
Gross Profit	20.8	21.4	(0.6)
Operating expenses	(22.5)	(20.7)	(1.8)
EBITDA	(1.7)	0.7	(2.4)
Depreciation and amortisation	(1.8)	(2.0)	0.2
EBIT	(3.6)	(1.3)	(2.3)
Net interest expense	0.0	0.0	0.0
Profit/(loss) before tax	(3.6)	(1.3)	(2.3)
Income tax expense	(0.5)	(1.4)	0.9
Net profit/(loss) after tax	(4.0)	(2.7)	(1.3)
GP Margin %	70%	67%	3%
Share based payments	(1.3)	-	(1.3)
Underlying EBITDA	(0.4)	0.7	(1.1)

Note: Totals may not add up precisely due to rounding

Balance sheet

For the year ended
31 December 2025

	31-Dec-25 (\$M)	30-Jun-25 (\$M)	Var (\$M)
Cash and cash equivalent	16.7	14.7	2.0
Trade receivables	9.0	14.5	(5.5)
Other current assets	7.1	7.4	(0.3)
Total current assets	32.8	36.6	(3.8)
Property, plant and equipment	5.1	5.4	(0.4)
Intangibles	51.8	54.1	(2.4)
Other non-current assets	3.8	4.4	(0.6)
Total non-current assets	60.6	64.0	(3.4)
Total assets	93.4	100.6	(7.2)
Trade payables	0.1	2.3	(2.2)
Deferred revenue	9.1	8.9	0.3
Other current liabilities	8.7	9.2	(0.5)
Total current liabilities	18.0	20.4	(2.4)
Deferred revenue	1.3	1.7	(0.4)
Other non-current liabilities	2.9	3.2	(0.2)
Total non-current liabilities	4.2	4.9	(0.7)
Total liabilities	22.1	25.3	(3.1)
Net assets	71.3	75.3	(4.0)
Equity	71.3	75.3	(4.0)

Note: Totals may not add up precisely due to rounding

Cash flows

For the year ended
31 December 2025

	31-Dec-25 (\$M)	31-Dec-24 (\$M)	Var (\$M)
Receipts from customers (incl. of GST)	39.1	37.9	1.3
Payments to suppliers and employees (incl. of GST)	(36.5)	(34.3)	(2.2)
Interest received	0.1	0.1	0.1
Interest and other finance costs paid	(0.1)	(0.0)	(0.1)
Income taxes paid	(0.0)	(0.2)	0.2
Net cash from operating activities	2.6	3.4	(0.7)
Payments for property, plant and equipment	(0.2)	(0.5)	0.3
Payment for intangibles	(0.0)	(0.0)	0.0
Net cash used in investing activities	(0.2)	(0.5)	0.3
Repayment of premium funding	(0.1)	-	(0.1)
Repayment of lease liabilities	(0.1)	(0.3)	0.1
Net cash used in financing activities	(0.2)	(0.3)	0.0
Effects of exchange rate changes	(0.2)	0.7	(0.9)
Net increase/(decrease) in cash and cash equivalents	2.0	3.2	(1.2)

Note: Totals may not add up precisely due to rounding

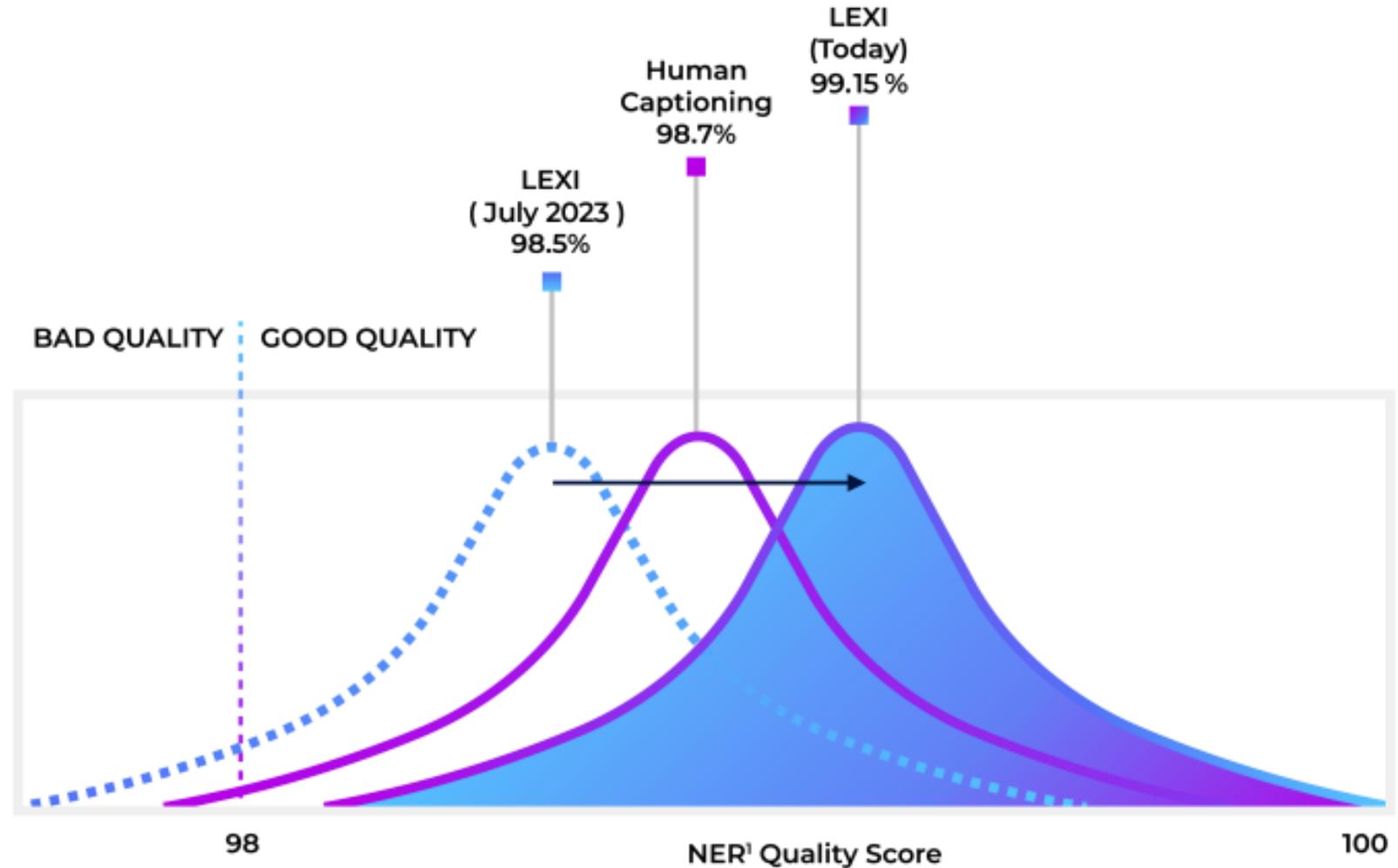
Continuing improvement in LEXI quality over humans



AI capabilities and advancements have led to AI captioning outperforming human captioning

AI capabilities and advancements have led to AI captioning outperforming human captioning

- LEXI (Today) – 99.15 %
- Human Captioning – 98.7%
- LEXI (July 2023) – 98.5%



Experienced Executive Team

Strong and qualified leadership team to drive product development and commercialisation strategy



TONY ABRAHAMS

Co-Founder and Chief Executive Officer

- Tony co-founded AI-Media in 2003
- Worked to establish the Oxford Internet Institute in 2001, while attending the University of Oxford as a Rhodes Scholar
- Director of Northcott Disability Services 2010-18



JASON SINGH

Chief Financial Officer

- Jason Singh joined in 2024 bringing significant experience in high growth multinational SaaS companies
- Strong Experience in ASX listed founder led Technology businesses



DONNA REID

Chief Operating Officer

- Donna joined AI-Media in March 2021 after five years as the Director of Content Service Operations for Foxtel Media
- Has more than 20 years' experience in Human Resources and Operations



BILL MCLAUGHLIN

Chief Product Officer

- Bill was CTO at EEG and now Chief Product Officer globally at AI-Media
- Since 2007, Bill has been with EEG architecting the company's leading software solutions including iCap, LEXI, and Alta

Board

Board renewal since 2024 with addition of talented and experienced new directors with ASX and deep technology expertise



JOHN MARTIN

Non-Executive
Chairman

- John joined the Board in 2010 and served as Chair until 2013, NED until 2024 and has been re-elected as Chair in February 2024.
- Served as CEO and Director of ASX-listed Babcock & Brown Communities, Primelife and Regeneus.



TONY ABRAHAMS

Co-Founder and Chief
Executive Officer

- Tony co-founded AI-Media in 2003.
- Worked to establish the Oxford Internet Institute in 2001, while attending the University of Oxford as a Rhodes Scholar
- Director of Northcott Disability Services 2010-18.



CHERYL HAYMAN

NED + Chair:
Rem & Nom

- Cheryl joined the Board in 2022
- Held several Non-Executive Director roles of ASX-listed companies over the last 15 years. Previously held CMO roles at George Weston Foods, Yum Restaurants International & Unilever.



BRENT CUBIS

NED + Chair:
Audit & Risk

- Brent joined the Board in July 2024
- Highly experienced Director and ASX CFO with over 30 years of Board level experience in senior roles including CFO of Cochlear Ltd and Nine Network Australia.



OTTO BERKES

NED + Co-Chair:
Product & Technology

- Otto joined the Board in Nov 2024
- Tech leader with 15+ years board level experience. Xbox founder, served as GM at Microsoft, CTO at HBO and CA Technologies, and CEO at HireRoad. Currently NED of Integral Ad Science & advisory board member for Intelagree.



BRAD BENDER

NED + Co-Chair:
Product & Technology

- Brad joined the Board in Nov 2024
- 25+ years of global product and mgt experience. Former VP of Product Mgt at Google - founded the Google Display Network + drove growth to become a multi-billion dollar business. Led Google News and Search Ecosystems, delivering AI-driven initiatives.

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