ASX Release

FOR IMMEDIATE RELEASE **26 February 2021**

Isentia Reports H1 FY21 Financial Results

- Revenue of $41.8 million, down $10.4m on H1 FY20[1]
- Cyber incident reduced revenue by $3.3m; $4.4m EBIT impact in H1 FY21
- Transformation program reduced cost base; total costs down $3.5m on pcp
- Underlying EBITDA[2] of $5.9m, down $6.9m on H1 FY20
- Net Profit After Tax before Amortisation (NPATA)[3] loss of $5.2m
- New 3-year debt facility of $46.6m; net debt of $30.3m at 31 December 2020

Isentia Group Limited (ASX: ISD) today released its financial results for the six months ended 31 December 2020.

Isentia faced a number of challenges in the first half including a cyber incident that severely disrupted services in the December quarter and second waves of COVID-19 that affected operations in South East Asia. These factors, along with a highly competitive environment in Australia, led to a $10.4m decline in revenue to $41.8m. This was partly offset by ongoing transformation and efficiency programs which delivered an 8.9% reduction in total costs resulting in underlying EBITDA of $5.9m.

The cyber incident is estimated to have reduced revenue by $3.3m in H1 FY21 as discounts and credits were provided to affected customers. Isentia also incurred additional remediation costs, leading to a direct EBIT impact of approximately $4.4m in the first half. The FY21 EBIT impact is expected to be $7.0-8.0m, slightly below previous guidance of $7.0-8.5m, and encompasses both the direct and downstream effects of the incident.

Isentia Managing Director and CEO Ed Harrison said: "This has been a difficult half for Isentia with a significant impact on earnings from the cyber incident and COVID-19. Although we diverted resources to strengthen our cyber security posture, we continued with our strategic transformation program and delivered new product features to our customers. Other projects were delayed by 4-6 months and are now expected to be delivered in Q4 FY21 and Q1 FY22.

"We exited our loss-making North Asia operations in September and realised significant operational efficiencies from our ongoing efforts to simplify, streamline and automate our business. We completed a new 3-year debt facility, and our action in the Copyright Tribunal continued as we sought a fair value exchange with publishers and a level playing field with competitors. Despite the recent challenges, our strategic roadmap remains in place and we are confident that our transformation programs will stabilise the business and eventually return it to growth."

[1] Excludes North Asia
[2] Underlying EBITDA adjusts for certain non-operating items and excludes North Asia.
[3] NPATA is net profit after tax before the amortisation of acquired intangibles and includes North Asia.

ANZ results
In H1 FY21, ANZ revenue of $30.7m, was $8.8m lower on pcp, reflecting $3.1m in lost revenue associated with the cyber incident and a highly competitive market. Automation initiatives continued to deliver a sustainable reduction in the ANZ cost base. The ANZ Contribution of $9.0m was down $7.3m on pcp with a contribution margin of 29%.

South East Asia results
In H1 FY21, South East Asia revenue was $11.1m which was $1.6m lower than pcp due to the cyber incident ($0.2m) and ongoing COVID-19 restrictions that impacted business development and limited the progress of the newly formed centralised management team. The recently created Data Science Hub started to contribute to revenue. The South East Asia cost base was $0.5m lower than pcp due to the implementation of labour efficiency programs. South East Asia Contribution of $2.2m was $1.1m lower on pcp with a contribution margin of 20%.

Balance sheet and cash flow
Operating cash conversion remained strong at 97% and management of the cash envelope remained a key priority. Cashflows during the half were affected by the cyber incident ($4.1m) and the North Asia exit ($2.6m). Investment in technology and product platforms continued in line with the strategic plan. Isentia entered into a new debt facility with the Commonwealth Bank of Australia (CBA) in October 2020. At 31 December, net debt was $30.3m.

Outlook
The cyber incident is expected to have an FY21 EBIT impact of $7.0-8.0m, which encompasses both direct and downstream effects including delays in strategic transformation projects. Despite this, Isentia remains confident that upcoming key product launches will stabilise the business and position the Company for future growth.

Investor Conference Call
Isentia Managing Director and CEO Ed Harrison and CFO Peter McClelland will host a conference call with the investment community including a Q&A session at **10am AEDT today (26 February 2021)**.

To listen to the webcast please visit:

https://webcast.boardroom.media/isentia-group-limited/20200824/NaN6021ea344509df001945b286

The release of this announcement was authorised by the Board.

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About Isentia
Isentia (ASX:ISD) is APAC's leading integrated Media Intelligence and Insights business with operations in eight markets. Isentia blends market-leading monitoring experience with analytics to help the world's biggest brands uncover the whole picture – and act on it. Powered by cutting-edge technology and a team of world class experts, our mission is to help businesses leap-forward where only genuine insight can take them. To find out more about how we inform better decisions, please visit **www.isentia.com**

H1 FY21 Results

26 February 2021

Agenda

1. **H1 FY21 Overview**
   Ed Harrison, CEO
2. **H1 FY21 Financial Performance**
   Peter McClelland, CFO
3. **FY21 Outlook**
   Ed Harrison, CEO
4. **Q&A**
   Ed Harrison, CEO
   Peter McClelland, CFO

H1 FY21 Overview

Ed Harrison, CEO

Leading provider of media intelligence in Asia-Pacific region

Most extensive suite of products and services

H1 FY21 Revenue[1]

$41.8m

H1 FY21 Underlying EBITDA[2]

$5.9m

Recurring revenue[3]

90%

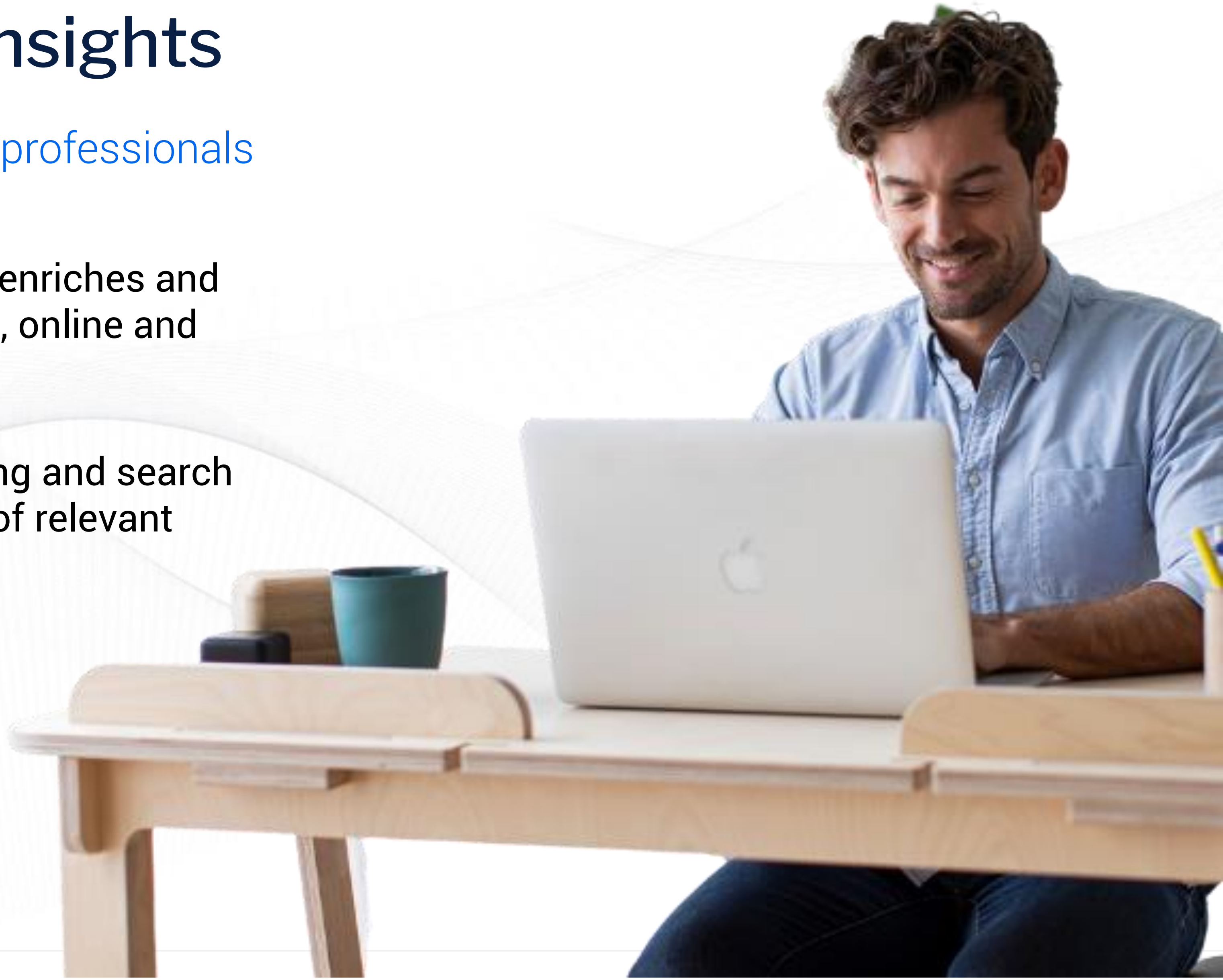
- Media intelligence software and managed services delivered across 8 markets
- High quality client base including government and leading corporates
- Globally awarded insights products and capabilities

1. H1 FY21 revenue excludes revenue from North Asia
2. Underlying EBITDA adjusts for certain non-operating items and excludes North Asia as discontinued business.
3. Percentage of H1 FY21 revenue that is recurring.

Media intelligence and insights

Delivering solutions for communications professionals

- Proprietary technology that ingests, enriches and analysis millions of press, broadcast, online and social media items daily
- Powerful natural language processing and search capabilities allow real-time delivery of relevant content and data to communication professionals
- On-platform analytics tools and human analysts enable a deep data understanding and creation of actionable insights



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H1 FY21 Overview

Challenging Q2 due to cyber incident but good progress made on business transformation

- Cyber incident interrupted key services in Q2 impacting revenue and profits
- Second waves of COVID-19, particularly across SE Asia affected revenue
- Despite disruption, progress in new product and tech delivery
- Secured new 3-year debt facility with Commonwealth Bank of Australia
- Completed exit of loss-making North Asia businesses
- Cost discipline and efficiency programs delivered 8.9% reduction in total costs

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Cyber Incident

Rapid response limits immediate impact of crisis

Immediate impact

- Key services disrupted for around 3 weeks
- Discounts or credits provided to affected customers: $3.3m in H1
- Additional remediation costs
- Direct H1 EBIT impact ~$4.4m[1]
- Broad customer support with no acceleration in churn

Downstream impact

- 4-6 month delay in some strategic transformation programs with expected revenue & retention benefits deferred
- Disruption of new business pipeline in Q2 affects future revenue base
- Additional operating costs
- Full FY21 EBIT impact of $7.0-8.0m[1]

Accelerated security program

- Capital expenditure brought forward
- Resources reallocated from other projects for 3-6 month period
- Completed multiple changes to strengthen cyber security posture

1. Previous guidance of $7.0-8.5m. FY21 EBIT impact of $7-8m includes H1 FY21 EBIT impact of ~$4.4m.

The State of the Strategy – CY2020

Continued transformation of business fundamentals and product offering

	ACHIEVED	IN PROGRESS
Establish an efficient operating model underpinned by single platform	• Automated ANZ press and broadcast workflows • Upgraded broadcast capture network • Interim copyright agreement	• Consolidate systems and move closer to a single platform • Extend machine learning to accelerate decision-making • Action in Copyright Tribunal
Deliver world-class, market-centric product innovation	• AI-driven boundary detection and ad filtering • New high definition broadcast media player • Faster data acquisition pipeline for social media content	• New platform architecture and UX • Final transition to 100% real-time content delivery • Live chat on platform • View and analyse social engagement data
Create regional scale to strengthen Asia Pacific leadership	• Launched Data Science Hub • Increased product development resources in South East Asia	• Standardise product offering across SEA to improve local and multimarket sales • Standardise processes across SEA to achieve labour efficiency

Establishing an efficient operating model

Transforming production processes and capabilities

- Automated ~60% of broadcast content processing (removing ~110 FTE), increasing speed of content delivery to customers
- Rolled out new broadcast capture hardware, allowing the delivery of higher quality content customers
- Centralised SEA production roles and automated multiple manual processes
- Implemented Live Chat to facilitate centralised account management and improve response times for customers
- Continued action in the Copyright Tribunal to ensure fair value exchange and level playing field

Delivering world-class product innovation

Six development teams, one focus

Social Monitoring

Expanding capability for social media monitoring, analysis and reporting in Mediaportal.

New User Experience

Making Mediaportal even easier to use, as well as delivering a fresh look.

Next Generation Broadcast

Transforming broadcast monitoring so clients receive broadcast items fast, in an easily digestible and shareable format.

Revamped Reporting

A new suite of reporting tools to help Comms professionals keep stakeholders informed in an efficient, controlled and elegant way.

Data Ingestion

Enhanced speed of media items, new metadata and new media types.

App

Delivering a new app experience, so users can check and share media coverage through the day.

Delivering world-class product innovation

Continue to progress product roadmap

JULY 1, 2019

Live Alerts
Real-time, SMS notifications of important broadcast content

Feeds
A consolidated view of your media coverage

Mobile App
Relaunched mobile experience with new look

Syndication
Syndicated media items grouped and condensed for quicker browsing

Translation
Easy translation of your online content at the click of a button

Analytics enhancements
More dashboard charts, as well as full screen view

Broadcast transcripts
Automated, Voice to Text transcripts of your broadcast content

Off-brief search
Find any media item, even outside your briefs

Transformed broadcast
Automated delivery of broadcast content to help you stay on top of the news in real-time

App enhancements
Search within the app and save and share key media items

CALD
Culturally and Linguistically Diverse Media Monitoring capabilities

App enhancements
Search sorting, recent searches and reporting capabilities

Broadcast improvements
Enhancements to the text and display of automated broadcast media. Introduction of Ad Filtering

COMING UP

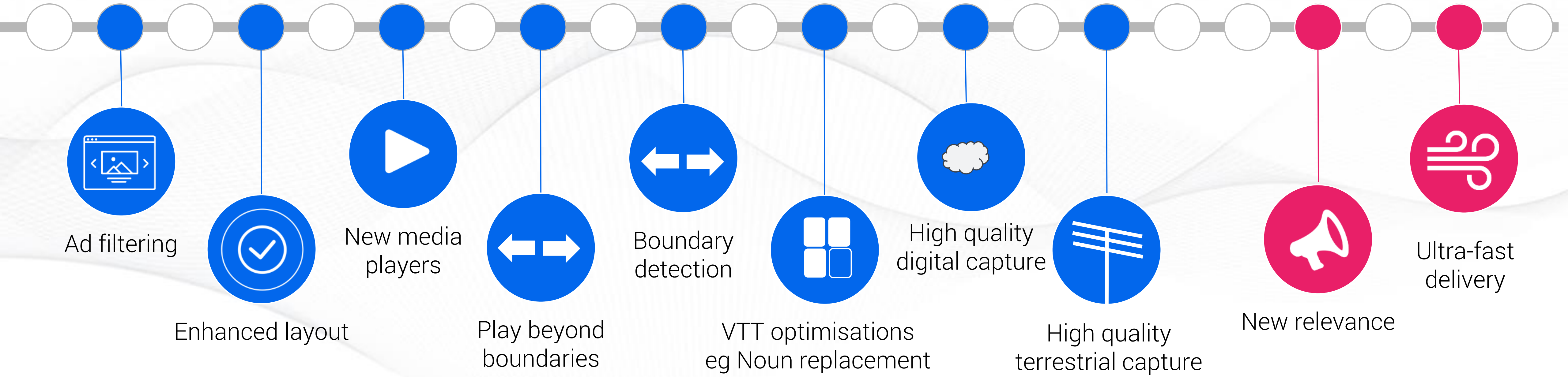
H2
Social data
Engagement data for social items and added reporting capabilities

H2
Enhanced Reports
Redesigned reporting experience including scheduled reports and customisation

H2
New look
Evolution of Mediaportal look and User Experience

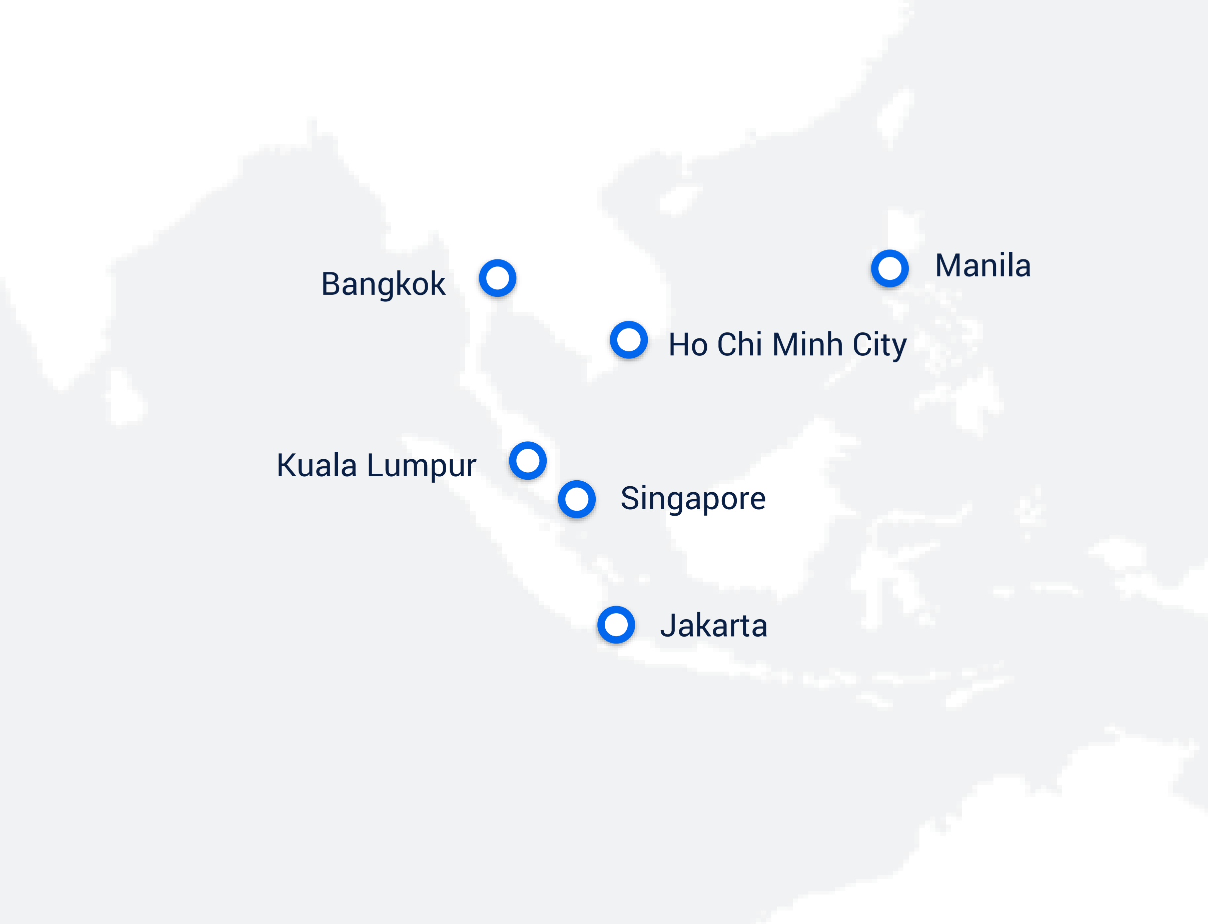
Delivering world-class product innovation

Reimagining broadcast delivery



Strengthening APAC leadership

Standardisation improves customer offering and delivers efficiencies



- Established new management team and structure
- Launched Data Science Hub to provide customers with enhanced, interactive insights dashboards
- Product and process standardisation allows improved customer offering and delivers labour efficiency
- Limited impact from cyber incident but COVID-19 putting pressure on new business and retention
- Strong Australian dollar negatively impacting on reported revenue

H1 FY21 Financial Performance

Peter McClelland, CFO

H1 FY21 Financial Overview

Revenue
$41.8M
$10.4m lower on pcp

Cost base improved by
8.9%
$3.5m lower on pcp

Underlying EBITDA[1]
$5.9M
$6.9m lower on pcp

Net debt
$30.3M
Increased by $5.7m vs 30 June 2020[2]

New 3-Year Debt Facility
$46.6M
Entered into with CBA

H1 Cyber EBIT Impact[3]
$4.4M
$3.3m revenue impact
$4.1m cash impact

1. Underlying EBITDA adjusts for certain non-operating items and is exclusive of North Asia as a discontinued business.
2. $6.7m increase from cyber and North Asia exit
3. Remediation costs treated as non-operating

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H1 FY21 Financial Results Summary excluding North Asia[1]

Cost reductions partially offset revenue declines and support continued investment

Overview	H1			
$M	**FY21**	**FY20**	**VARIANCE**	**VARIANCE %**
Revenue	**41.8**	**52.2**	**(10.4)**	**(19.9%)**
ANZ	30.7	39.5	(8.8)	(22.3%)
ASIA	11.1	12.7	(1.6)	(12.6%)
Cost of Sales	**8.6**	**8.4**	**(0.2)**	**(2.4%)**
Operating Expenses	**27.3**	**31.0**	**3.7**	**11.9%**
Underlying EBITDA	**5.9**	**12.8**	**(6.9)**	**(53.8%)**
Underlying EBITDA Margin	*14.1%*	*24.5%*		
Subscription Customers	**FY21**	**FY20**		
Average Monthly Customers	2589	3053		

1. Underlying EBITDA adjusts for certain non-operating items and is exclusive of North Asia as a discontinued business.

Revenue in ANZ and South East Asia impacted by disruptions to product delivery caused by the cyber incident in Q2 FY2021.

COVID-19 continued to exert pressure on revenues and some operational programs in South East Asia.

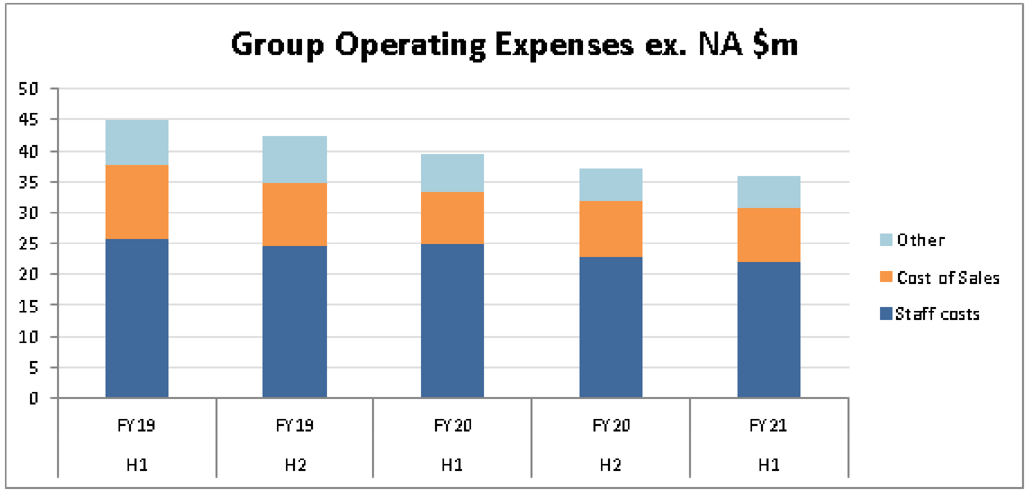
Cost transformation programs continue to deliver reductions in cost base.

Isentia continues to invest in business development, product and tech resources.

Group Operating Expenses ex. North Asia

Cost transformation programs providing sustainable cost savings

Total Expenses	H1	H2	H1	H2	H1
$M	FY19	FY19	FY20	FY20	FY21
Staff costs	25.8	24.7	24.9	22.9	22.0
Cost of Sales	11.8	9.9	8.4	9.0	8.6
Other	7.4	7.8	6.1	5.4	5.3
Total expenses	45.0	42.5	39.4	37.2	35.9



Cost transformation programs continue to deliver sustainable cost reductions into business operating model.

Total expenses reduce by $1.2m or 3.3% v's H2 FY20 and $3.5m or 8.9% v's H1 FY20

- Strategic labour initiatives and ongoing process improvement program continue to deliver sustainable reductions in total employment costs.
- Cost of sales has reduced over time with Copyright in Australia. Increases in current year due to some direct supply agreements.
- Investment in technology supporting automation initiatives is offset by other tech savings
- Management continue to deliver reduced costs in all other areas

H1 FY21 ANZ Results Summary

Revenue trends affected by ongoing competition and cyber event

ANZ	H1			
$M	**FY21**	**FY20**	**VARIANCE**	**VARIANCE %**
Revenue				
SaaS - Media Intelligence	23.2	31.0	(7.8)	(25.2%)
VAS	7.5	8.5	(1.0)	(11.8%)
Total SaaS/Vas	**30.7**	**39.5**	**(8.8)**	**(22.3%)**
ANZ Contribution	**9.0**	**16.3**	**(7.3)**	**(44.7%)**
Contribution Margin	29%	41%		

Revenue decline of $3.1m due to the cyber incident.

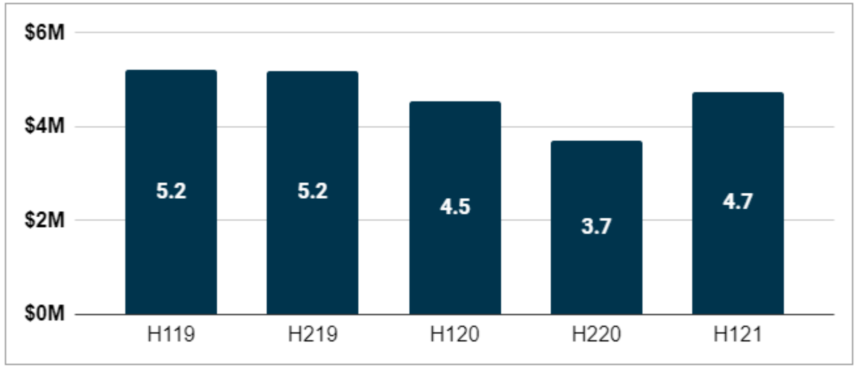
Excluding cyber impact, ANZ revenue down 14.4% due to ongoing competition.

Automation initiatives continue to deliver sustainable reductions in the ANZ cost base.

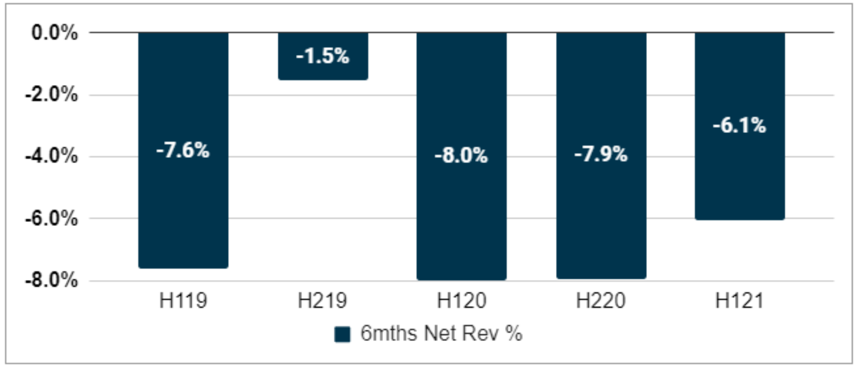
ANZ Focus On Client Acquisition and Retention

New business trends improve with strong Q1 FY21

ANZ Annualised New Billings $m



ANZ Net Win/Loss of Subscription Billing (1)



Whilst net win/loss revenue ratio is still negative, underlying trends are stabilising and improving.

- Annualised new business performance higher than FY20 due to investment in ANZ Business Development team and deliver of new products
- Strong Q1 for new biz, up 16% on pcp
- Net Win loss ratio improves with stronger new billings and consistent renewal rates

[1] Net change in the subscription billing run rate over the period due to client wins and losses.

H1 FY21 South East Asia Results Summary

COVID-19 affected SEA growth

South East Asia	H1			
$M	**FY21**	**FY20**	**VARIANCE**	**VARIANCE %**
Revenue				
SaaS - Media Intelligence	4.8	5.9	(1.1)	(18.8%)
VAS	6.3	6.8	(0.5)	(7.4%)
Total SaaS/Vas	**11.1**	**12.7**	**(1.6)**	**(12.6%)**
Asia Contribution	**2.2**	**3.3**	**(1.1)**	**(34.3%)**
Contribution Margin	20%	26%		

Asia Contribution is the profit before the allocation of Head Office costs.

South East Asia revenue affected by the cyber incident ($0.2m) and ongoing COVID-19 restrictions

- Impacting new business
- Hampering progress of the newly formed centralised management team.

The Data Science Hub started contributing to revenue

Labour efficiency programs remain a key focus for South East Asia

Cash Flow – Cash Envelope

Strong operating cash conversion offset by extraordinary events

Cash Flows		
$M	**H1FY21**	**H1FY20**
Underlying EBITDA post AASB16, including NA	**5.5**	**12.5**
Less: NA EBITDA Loss	(0.4)	(0.3)
Underlying EBITDA post AASB16, excluding NA	**5.9**	**12.8**
(Increase) / decrease in net working capital	(0.2)	(4.6)
Net cash from operating activities	**5.7**	**8.2**
Operating cash flow conversion %	*97%*	*64%*
Payments for property, plant and equipment	(0.2)	(0.6)
Payments for intangibles	(3.5)	(4.5)
Proceeds from release of security deposits	0.2	0.1
Proceeds from customer referral fees	0.7	-
Proceeds from disposal of subsidiary	0.1	-
Net cash used in investing activities	**(2.7)**	**(5.0)**
Net finance costs paid	(1.2)	(1.3)
Tax paid	(1.0)	(2.2)
Proceeds from borrowings	40.0	5.0
Repayment of borrowings	(40.8)	(5.8)
Repayments of leases	(1.6)	(2.0)
North Asia operating cash flows	(0.3)	(0.3)
North Asia Exit costs	(3.2)	-
Other one-off items including restructuring costs	(1.5)	(0.5)
Net cash from/(used in) financing activities	**(9.5)**	**(7.0)**
Net cash flow	**(6.5)**	**(3.8)**
Cash and cash equivalents at the beginning of the financial period	16.2	14.7
Cash and cash equivalents at the end of the financial period	9.7	10.9
Gross drawn debt	**40.0**	**42.3**
Net debt	**30.3**	**31.4**

- Cashflows impacted by extraordinary events
  - Cyber incident of $4.1m
  - North Asia cash outflow of $2.6m (including closure costs net of proceeds and residual trading losses)
- Cashflows conversion remains a key focus of management.
  - Operating cash conversion at 97%
- Continued investment technology and product platforms in line with the strategic plan.
- No dividends paid or declared during the period
- Isentia refinanced its debt facilities during H1 FY21

Debt Facility

New 3-year facility

- Isentia entered into a new 3 year facility agreement with CBA during October 2020.
- The $46.6m facility consists of;
  - $33.5m amortising facility,
  - $12m revolving cash advance.
  - $1.1m Bank guarantee & corporate credit cards.
- $40.4m drawn debt at Dec 2021
- Covenant testing commences March 2021
- As at 31 December 2020;
  - GLR 2.18x v's Covenant of <2.57x
  - DSCR 2.42x v's Covenant >1.5x
- Covenant reset through March 2022 to reflect the impacts of the cyber incident.

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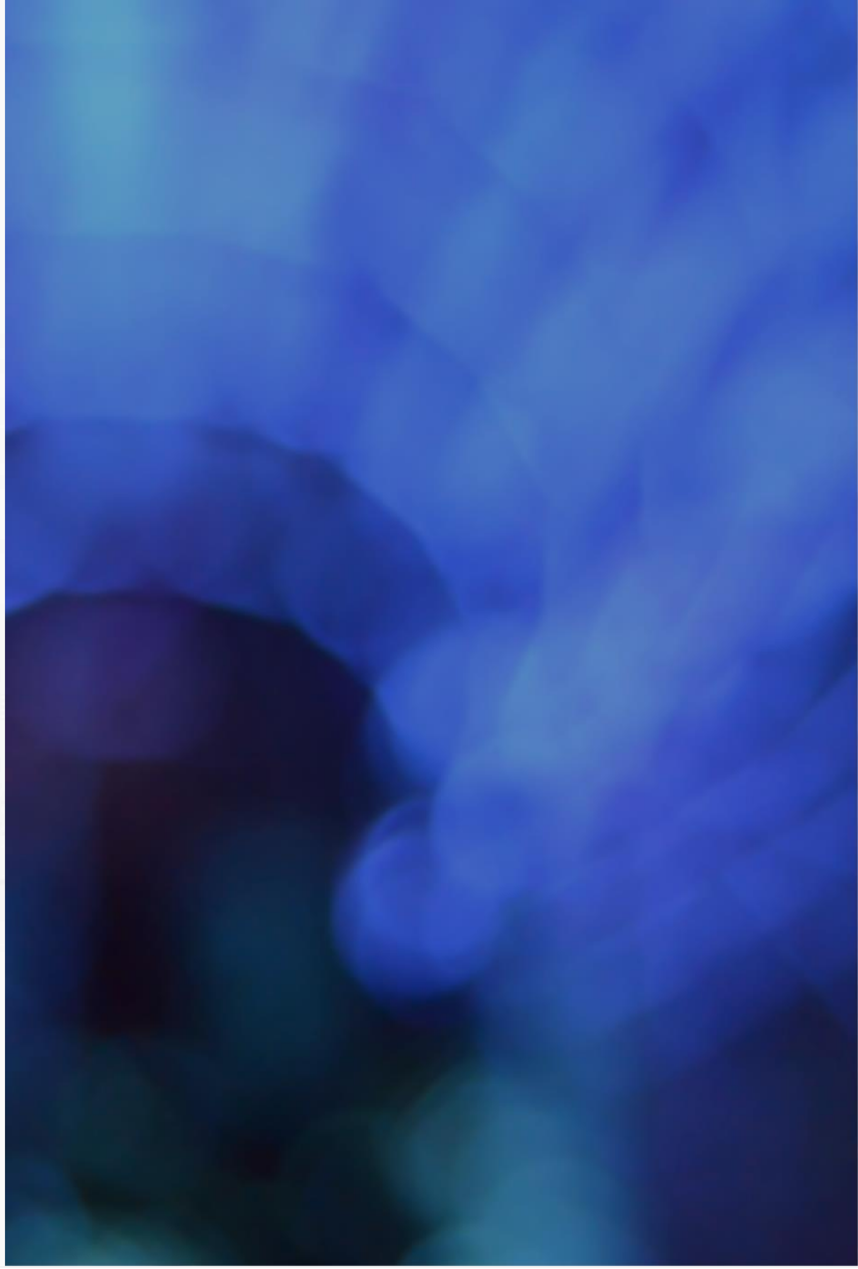
Outlook

Ed Harrison, CEO

Looking ahead

- ANZ market remains competitive and COVID-19 impacts in SEA expected to continue through H2 FY21
- FY21 EBIT impact of $7-8m from cyber incident
- 4-6 month delay in strategic transformation programs with expected revenue & retention benefits deferred
- Delivery of key new products accelerates into Q4 FY21 and Q1 FY22



Q&A

Ed Harrison, CEO

Peter McClelland, CFO

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Appendix

Group Financial Results including North Asia

Isentia Group

GROUP	H1			
$M	FY21	FY20	VARIANCE $M	VARIANCE %
ANZ	**30.7**	**39.5**	**(8.9)**	**(22%)**
SaaS - Media Intelligence	23.1	31.0	(7.8)	(25%)
VAS	7.5	8.5	(0.9)	(11%)
Asia	**12.2**	**17.0**	**(4.8)**	**(28%)**
SaaS - Media Intelligence	5.3	8.3	(3.0)	(36%)
VAS	6.9	8.7	(1.8)	(21%)
Revenue	**42.9**	**56.5**	**(13.7)**	**(24%)**
Copyright, consumables and other direct purchases	(11.5)	(11.8)	0.3	(2%)
Employee costs	(22.9)	(28.6)	5.7	(20%)
Other operating expenses	(4.3)	(5.6)	1.3	(23%)
Expenses	**(38.8)**	**(46.0)**	**7.2**	**(16%)**
Underlying EBITDA pre AASB 16	**4.1**	**10.5**	**(6.4)**	**(61%)**
AASB16 Adjustment	**1.4**	**1.9**	**(0.5)**	**(26%)**
Underlying EBITDA after AASB 16 Adjustment	**5.5**	**12.4**	**(6.9)**	**(55%)**
EBITDA margin	*10%*	*18%*	(0.1)	(48%)
Non-operating items	(3.2)	(0.5)	(2.7)	502%
North Asia exit	(0.4)		(0.4)	-
Impairment of assets	(1.3)	-	(1.3)	-
Loss on disposal of assets	0.0	(0.1)	0.1	(109%)
EBITDA	**0.6**	**11.9**	**(11.2)**	**(95%)**
Depreciation and amortisation	(5.2)	(5.2)	(0.0)	0%
Amortisation of acquired intangibles	(0.7)	(3.8)	3.1	(81%)
Finance costs	(1.3)	(1.2)	(0.1)	7%
Profit/(loss) before tax	**(6.5)**	**1.7**	**(8.2)**	**(478%)**
Tax	0.6	(1.0)	1.6	(164%)
NPAT	**(5.9)**	**0.7**	**(6.5)**	**(1,003%)**
add back: Amortisation of acquired intangibles after tax	0.7	3.0	(2.3)	(76%)
NPATA	**(5.2)**	**3.6**	**(8.7)**	**(245%)**
add back: Impairment of assets	1.3	-	1.3	-
add: Extraordinary items (net of tax)	3.1	0.4	2.7	712%
Underlying NPATA	**(0.8)**	**4.0**	**(4.8)**	**(120%)**
Underlying Earnings per share (cents)	*(0.4)*	*2.0*	(2.4)	(120%)

Underlying EBITDA excludes non-operating items.

- Shown pre and post the impact of AASB16 for comparative purposes

Depreciation and amortisation increased due to adoption of AASB16.

Non-operating items include costs associated with the closure of North Asia and other non operating items such as restructuring costs

Tax expense is impacted by non deductibility of asset impairments and closure costs associated with North Asia.

Summary Balance Sheet

$M	December 2020	June 2020
Current assets		
Cash and cash equivalents	9.7	16.1
Trade and other receivables	14.2	17.5
Income Tax Refund Due	0.1	0.2
Prepayments	1.1	1.4
Assets classified as held for sale	-	0.3
Total current assets	**25.1**	**35.6**
Non-current assets		
Property, plant and equipment	2.0	2.4
Right-of-use assets	5.8	7.5
Intangibles	78.0	81.2
Deferred Tax Assets	6.2	5.4
Total non-current assets	**92.1**	**96.5**
Total Assets	**117.2**	**132.1**
Current Liabilities		
Trade and other payables	13.3	12.0
Contract liabilities	4.5	5.0
Borrowings	2.2	3.8
Lease liabilities	2.7	3.8
Current Tax Liabilities	0.1	0.4
Provisions	5.8	9.7
Liabilities directly associated with assets classified as held for sale	-	0.2
Total current liabilities	**28.7**	**34.9**
Non-current liabilities		
Borrowings	37.7	36.7
Lease liabilities	3.3	4.7
Derivative financial instruments	-	0.1
Deferred Tax Liabilities	7.3	7.8
Provisions	0.3	0.2
Total non-current liabilities	**48.6**	**49.6**
Total Liabilities	**77.3**	**84.4**
Total equity	**39.9**	**47.7**

- Decrease in trade receivables in line with underlying revenue performance. DSO day management remains a key focus and were maintained during COVID and Cyber incident.
- Adoption of AASB16 in FY20 impacts on the following balance sheet items, Recognition of right-of-use assets and corresponding lease liability and DTA and DTL
- Decrease in the Intangibles includes: $1.3m impairment on internally generated software; $1.5m FX revaluation loss on Goodwill in SEA; $38m amortisation which are net off by $3.5m additions.
- Isentia has entered into a 3 year facility agreement with CBA on 13 October 2020. The loan has been transferred from Westpac to CBA on 16 November 2020. The new facility with CBA is $46.6m, and consists of $33.5m amortising facility (A), $12m revolving cash advance (B) and $1.1m Bank guarantee & corporate credit cards (C). The repayment under facility A will start on 30 June 21 with $750k per quarter.
- The repayment within the next 12 months is classified under current liabilities.
- Increase in trade payables due to deferrals of supplier payments following the cash management after the Cyber incident.
- On 14 August 2020, the Group completed the sale of its interest in the Beyond Co.Ltd. Upon receiving the cash proceeds, the associated assets held-for-sale and liabilities held-for-sale were released in H1 FY21.
- Increase in DTA due to tax losses booked under the Australia consolidated tax group.

Thank you