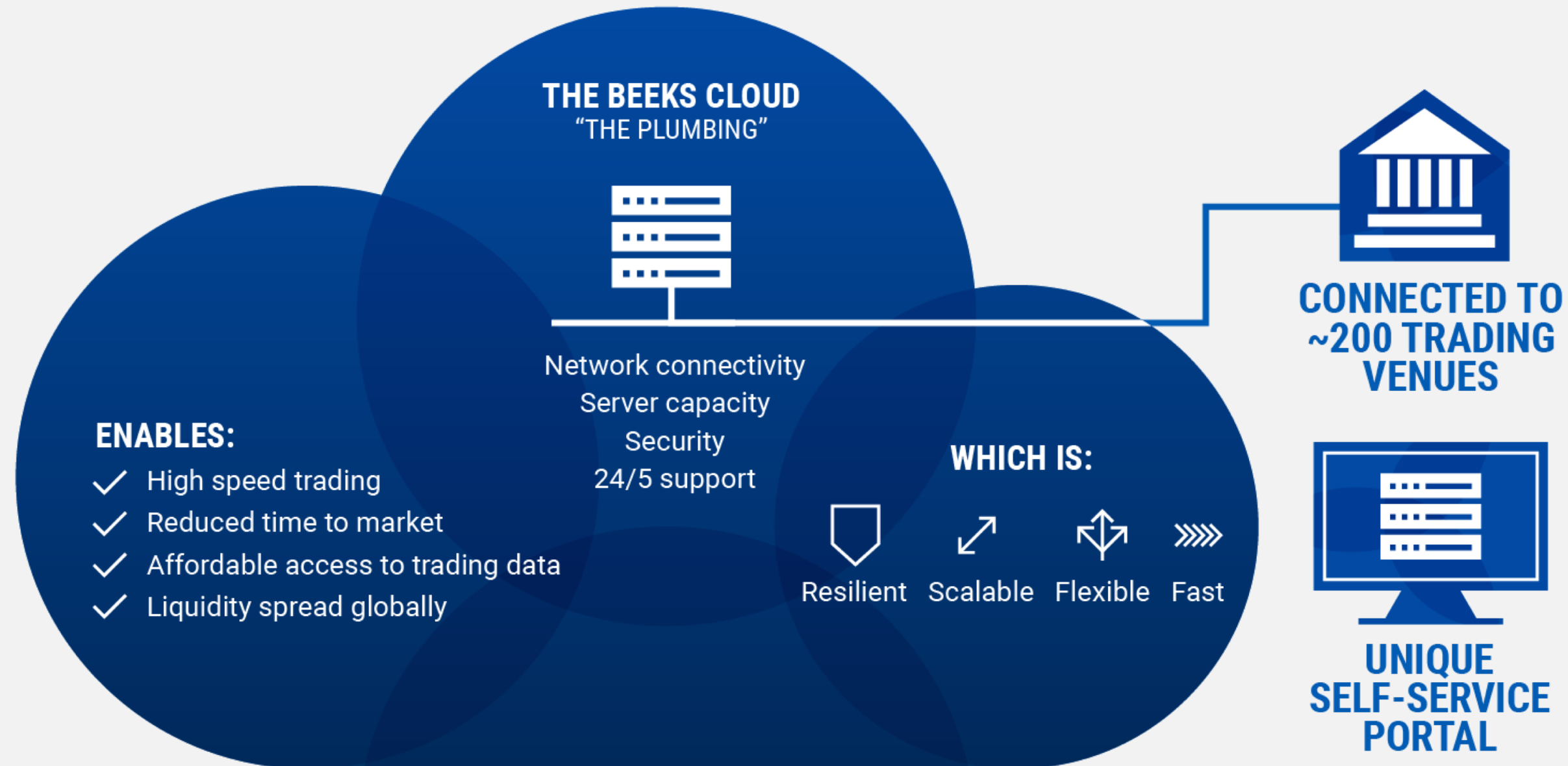


Beeks Financial Cloud

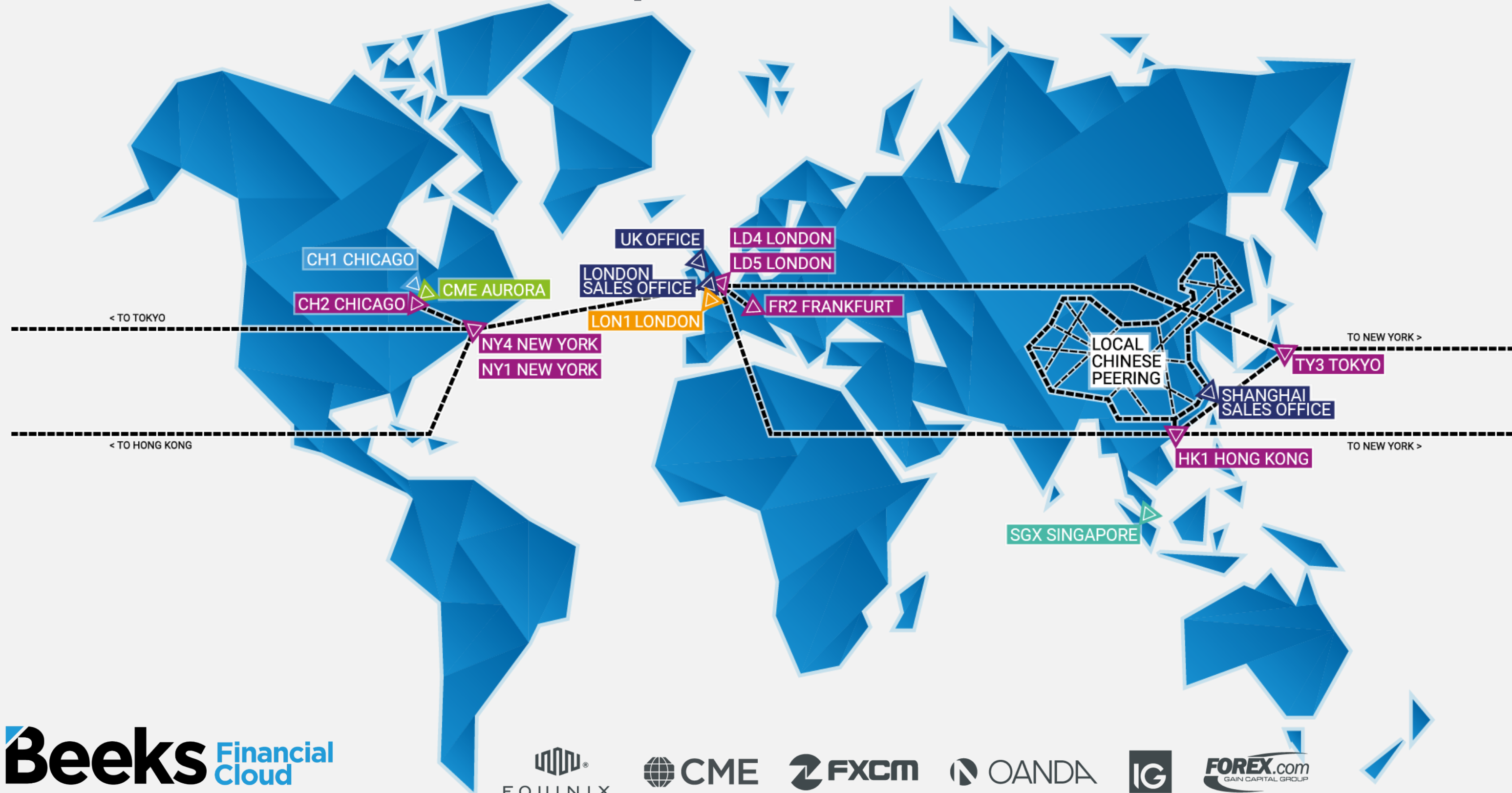


Beeks Financial Cloud

A rapidly deployed, secure and scalable cloud environment for automated trading applications



The Network Map



Key Messages

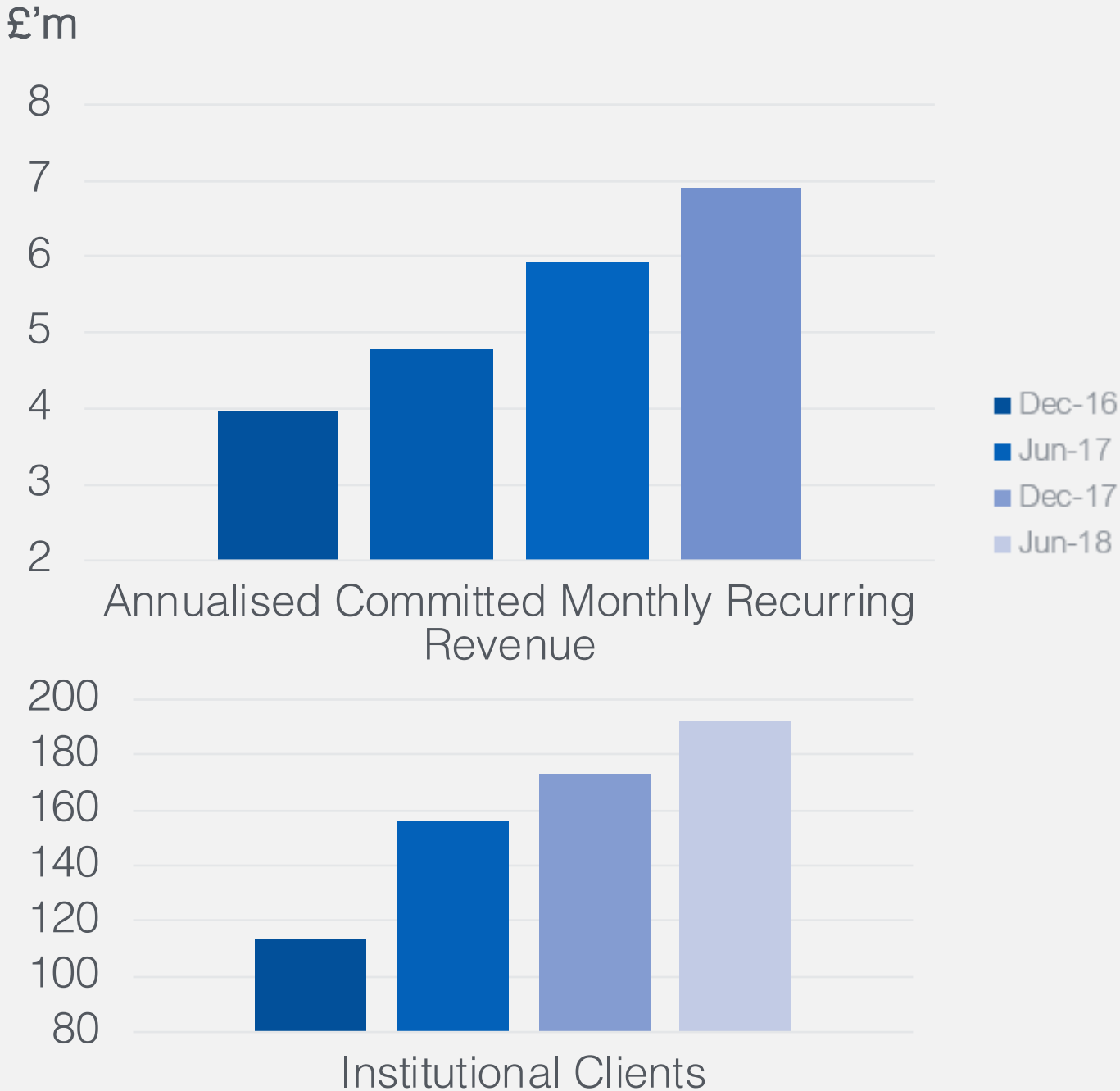
Strong financial performance with growing levels of revenue visibility

Successful geographic expansion and entry into all key asset classes

Continued momentum in the automated trading industry towards the cloud model of deployment

Maiden dividend

Confident outlook



Positive Financial Results

- Revenue increased by 41% to £5.58m (2017: £3.97m)
- Annualised Committed Monthly Revenue up 47% to £6.9m (2017: £4.7m)
- Gross margin increased to 53% (2017: 39%)
- Gross profit up 90% to £2.98m benefiting from increased revenue generated from existing invested capacity
- Underlying PBT £1.19m (2017: £0.06m) with statutory PBT £0.75m (2017: £0.76m loss)
- Underlying EPS 2.27p (2017: 0.22p loss)
- Underlying EBITDA increased 258% to £1.95m (2017: £0.54m).
- Net cash was £2.09m (2017: net debt £0.74m)

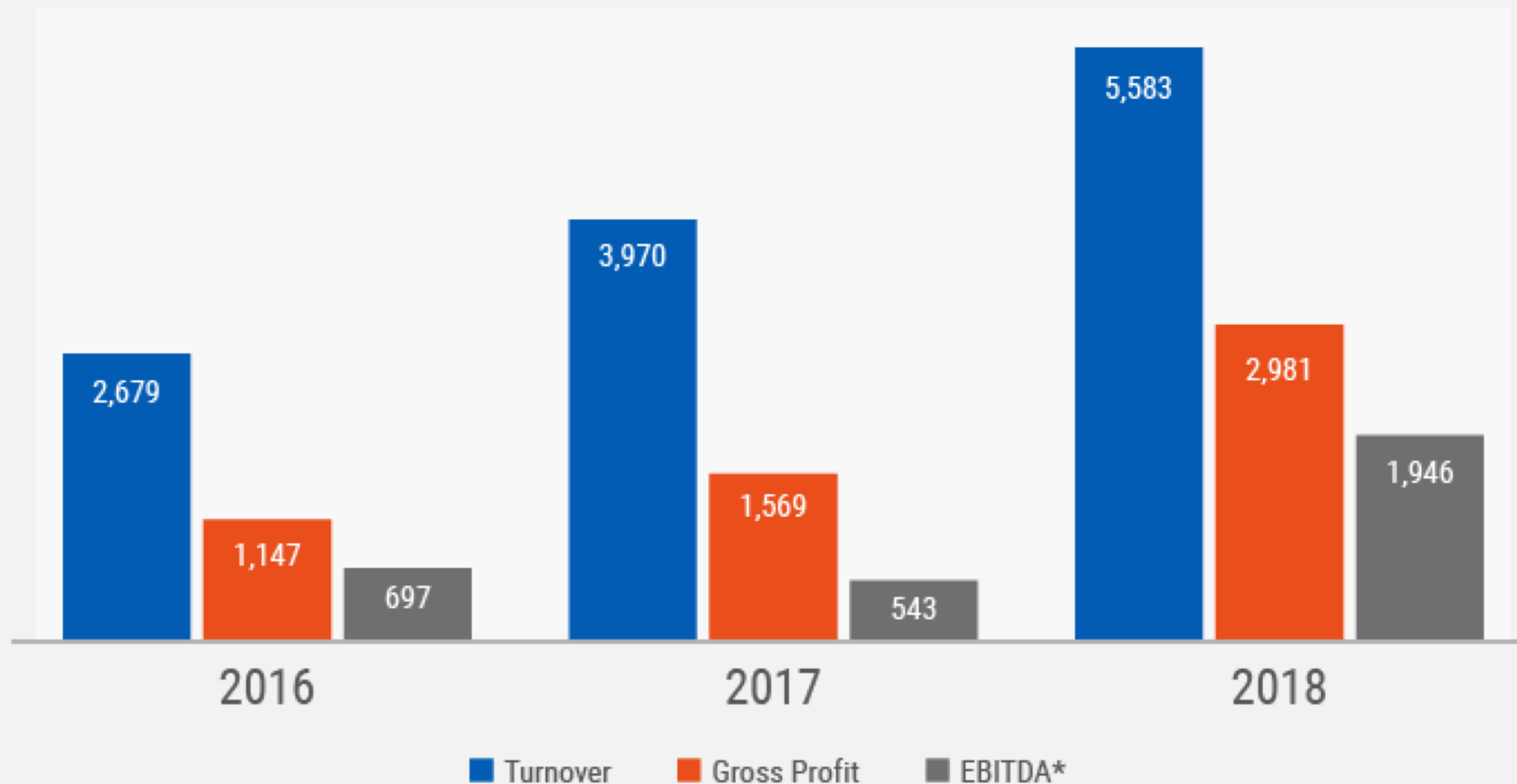
The benefits of our IaaS model:

- 95% of clients pay monthly
- 5% pay annually in advance
- Average entry fee of £800 month, typically increases over time
- Corporate / private clients 85/15 revenue split

**Underlying excludes IPO exceptional costs relating to AIM listing and amortisation on acquired intangibles*

Income Statement

INCOME STATEMENT (£,000)



INCOME STATEMENT

	2016 (£'000)	2017 (£'000)	2018 (£'000)
Turnover	2,679	3,970	5,583
Gross profit	1,147	1,569	2,981
Gross Margin %	43%	39%	53%
EBITDA*	697	543	1,946
EBITDA %	26%	14%	35%
Operating profit*	393	143	1,344
EBIT %	15%	4%	24%
Profit before tax*	321	55	1,191
EBT %	12%	1%	21%

Capacity

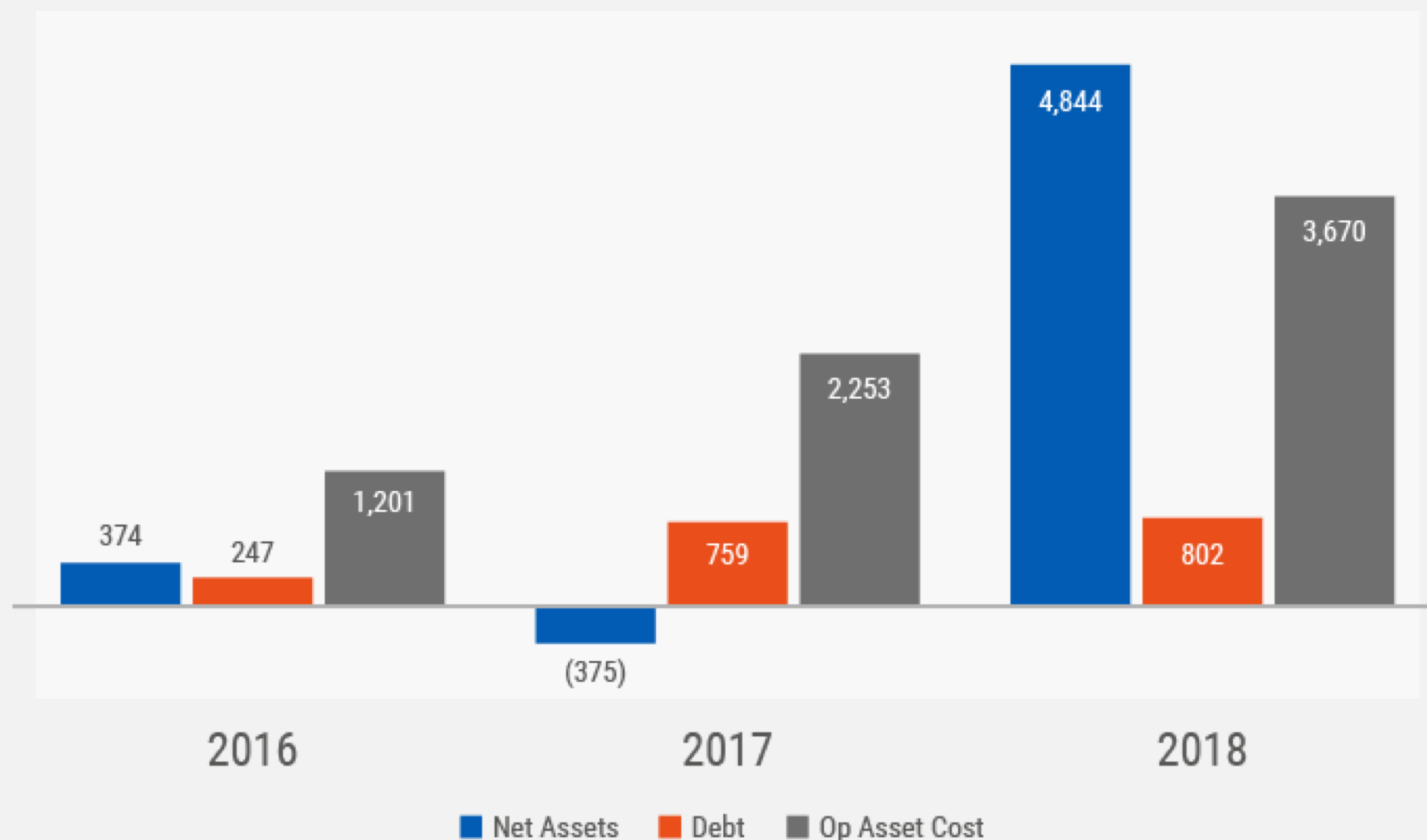
LOCATION	ROW		UNUSED CAPACITY
DC3 (USA)	5 RACK CAGES	<div><div></div><div></div><div></div><div></div><div></div></div>	0.5
EQUINIX FR2 (FRANKFURT)	1 RACK CAGE	<div><div></div></div>	0.5
EQUINIX HK1 (HONG KONG)	2 RACK CAGES	<div><div></div><div></div></div>	1.0
EQUINIX LD4 (LONDON)	4 RACK CAGES	<div><div></div><div></div><div></div><div></div></div>	2.0
EQUINIX LD5 (LONDON)	5 RACK CAGES	<div><div></div><div></div><div></div><div></div><div></div></div>	1.0

LOCATION	ROW		UNUSED CAPACITY
INTERXION LON1 (LONDON)	1 RACK CAGE	<div><div></div></div>	0.5
EQUINIX NY4 -01 (USA)	5 RACK CAGES	<div><div></div><div></div><div></div><div></div><div></div></div>	1.0
EQUINIX TY3 (TOKYO)	2 RACK CAGES	<div><div></div><div></div></div>	0.5
HALSEY (USA)	2 RACK CAGES	<div><div></div><div></div></div>	1.0
SGX (SINGAPORE)	1 RACK CAGE	<div><div></div></div>	0.5

- Total unused capacity of 8.5 racks across locations
- Potential to support up to c.£3m of additional annualised revenue from 7 of these racks, depending on location/mix, from current cost base

Balance Sheet

BALANCE SHEET (£,000)



	2016 (£'000)	2017 (£'000)	2018 (£'000)
ASSETS			
Tangible fixed assets	648	1,302	2,137
Goodwill / Intangibles	639	574	852
Deferred tax assets	-	27	255
Total fixed assets	1,287	1,903	3,244
Trade & other receivables	336	392	664
Cash & cash equivalents	31	23	2,887
Total current assets	367	415	3,551
TOTAL ASSETS	1,654	2,318	6,795
LIABILITIES			
Trade & other payables	971	1,868	1,041
Leases & loans	202	361	470
Creditors < one year	1,173	2,229	1,511
Lease & loans	45	398	332
Other creditors & provisions	62	66	108
Creditors > one year	107	464	440
Total Liabilities	1,280	2,693	1,951
NET ASSETS	374	(375)	4,844

Cash Flow

	2016	2017	2018
	(£'000)	(£'000)	(£'000)
CASH FLOWS FROM OPERATING ACTIVITIES (INCLUDING EXCEPTIONALS):			
Operating cash flows before working capital (including tax paid)	499	(253)	1,486
Net receivables/payables	412	872	(1,038)
Net cash from operating activities	911	619	448
Purchase of PPE (net)	(444)	(818)	(1,071)
Purchase of goodwill/intangibles	(358)	(32)	(384)
Net cash used in investing activities	(802)	(850)	(1,455)
Proceeds from borrowings	119	136	-
Repayment of borrowings & leases	(245)	(409)	(536)
Net interest paid	(72)	(88)	(153)
Sale and leaseback of PPE	215	584	203
Proceeds from the issue of new share capital	-	-	4,357
Dividends paid	(168)	-	-
Net cash used in financing activities	(151)	223	3,871
Net increase/decrease in cash	(42)	(8)	2,864
Cash at beginning of year	73	31	23
Cash at end of year	31	23	2,887

Delivering Against Our Growth Strategy

GROWTH

- Expansion into Crypto currencies, Equities and Fixed Income
- Geographic expansion into Singapore
- Increased to nearly 200 connections to trading venues

DEVELOPMENT

- Built and launched financial services industry's only self-service portal for customers
- Continued automation of our activities, from billing to service delivery
- Joined the Equinix Cloud Exchange™ Fabric

INVESTMENT

- Increase in headcount to 35, particularly in technical support and delivery
- Hired VP Sales
- Additional sales locations in London and Shanghai
- Additional datacentres in Singapore, London and US

The Market Opportunity

SCALE

- Global algorithmic trading market expected to grow from \$8.8bn in 2016 to \$18.1bn by 2025 – a 8.7% CAGR*
- Up to 20,000 financial institutions as potential customers (current clients = 1% of market)
- In 2016, Equities accounted for the largest share of the market – a new market for Beeks
- Forex market continues to fragment, with new entrants requiring IaaS
- High levels of activity in the Cryptocurrency market, could be key going forwards
- Asia Pacific is expected to have the highest CAGR

MARKET NEED

- Majority of institutions are still using their own IT infrastructure
- Decreased latency, increased flexibility and cost-benefits of cloud computing will see a long-term gradual shift to this model
- They will seek a provider who has:
- A proven capability
- Offering within all Asset Classes
- Breadth of cross-connects
- High levels of security

- Our innovations such as the self-service Partner Portal, allow us to enhance the efficiency of our services and take advantage of new opportunities in our market

*Source: The Insight Partners: January 2018: Automated Trading Market to 2025 - Global Analysis and Forecasts by Trade Type (Equities, Commodities, FOREX, Funds and Others); and End-User (Sell-Side Firms, Buy-Side Firms and Systemic Traders)

Strategic Priorities

SHORT TERM

- Asia focus
- Potential expansion into South America
- 'Wait and see' approach to China
- Anticipate growing revenue contribution from Fixed Income and Cryptocurrency automated trading, on Crypto we are investing in some key campaigns to attract the Exchanges to Beeks
- Expansion of our Equities offering via further expansion of sites and Exchanges we connect to
- Further recruitment of Experienced Financial Services staff across all business functions

LONG TERM

- Break into the Tier 1 banking space to provide large institutions with Cloud Services

ONGOING

- Further self-service automation
- Further services to our platform, e.g. data feeds from additional trading venues, data normalisation, cloud data recovery and additional connectivity offerings and WAN capacity
- Consider both bolt-on and larger strategic acquisitions

Summary and Outlook

- Profitable business with continued revenue growth
- Compelling offering with high barriers to entry
- Trusted relationships and a reliable client base
- Continued movement to our service offering
- Ongoing growth of the automated trading market
- Confident in our ability to drive continued growth

Appendix

Beeks Financial
Cloud



Sales trends



Our Clients

Buy and sell side:



Technology partners:



Board and Executive Team



Gordon McArthur
CEO

- Founder & CEO since 2011
- 19 years' experience in the IT Industry
- Previous positions include senior commercial roles with IBM for 8 years



Simon Goulding
CFO

- At Beeks since 2012
- Chartered Accountant (ICAEW), qualifying with KPMG, Birmingham
- Over 25 years' experience in numerous senior roles



Mark Cubitt
Chairman

- 21 years' of PLC experience
- Formerly CFO at Wolfson Microelectronics PLC and Chairman of Superglass Holdings PLC
- Numerous CFO roles in public and private companies



Christopher Livesey
Independent NED

- 25 years' experience in the software industry
- Currently the SVP and General Manager of Mainframe Products at Micro Focus
- Held several senior sales and marketing leadership positions in global companies



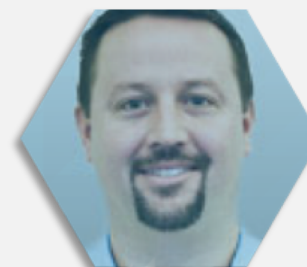
Will Meldrum
Independent NED

- Currently SVP and Chief of Staff at IHS Markit
- Previously worked at Deutsche Bank managing interests across a portfolio of investments



Tony Doleman
Technical Director

- Founder and experienced technical lead
- 25 years' operational IT experience



Peter Johnson
VP Americas

- VDIWare founder
- 20 years' experience with Futures Markets



Paul Donohoe
COO

- Almost two decades of experience delivering IT projects in UK financial sector.
- COO since 2015



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