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Scout24 AG

H1 2017 Results Conference Call

August 9, 2017

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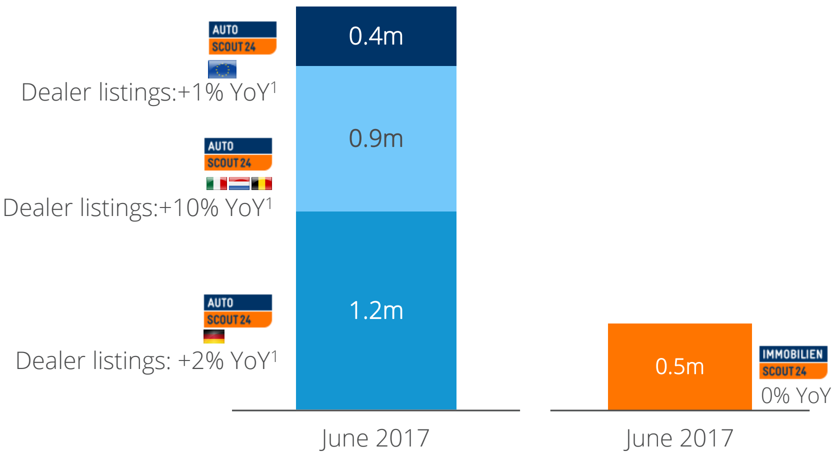
Key Operational Highlights

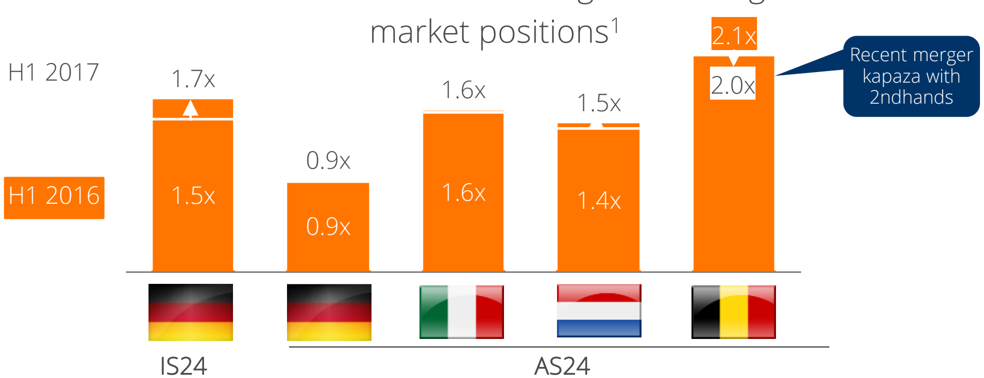
We Continue to Be the Most Relevant Marketplace for BOTH our Customers and Consumers

Record Listings Levels

Around 3m active listings

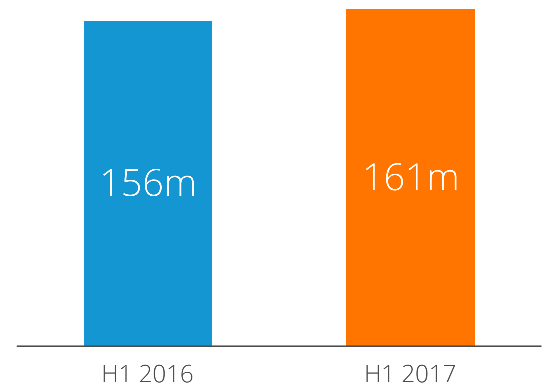


We are further cementing our leading market positions[1]

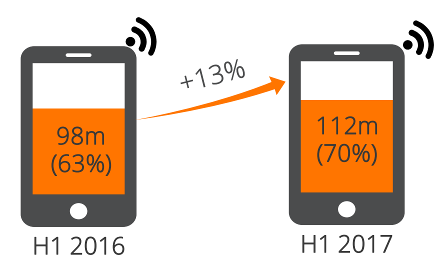


Record Traffic Levels

Visits to core brands at constant high level



7 out of 10 engage through us on the go



Sources: Management estimates, Autobiz June 2017, average on monthly traffic (sessions) measured by own traffic monitor (googly analytics).
Mobile traffic as a percentage of total traffic (sessions).
1. For AS24 Dealer listings only, not considering private listings out of lack of comparability.

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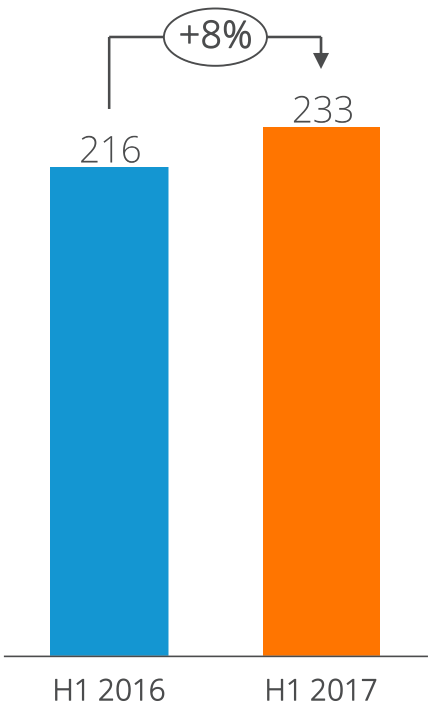
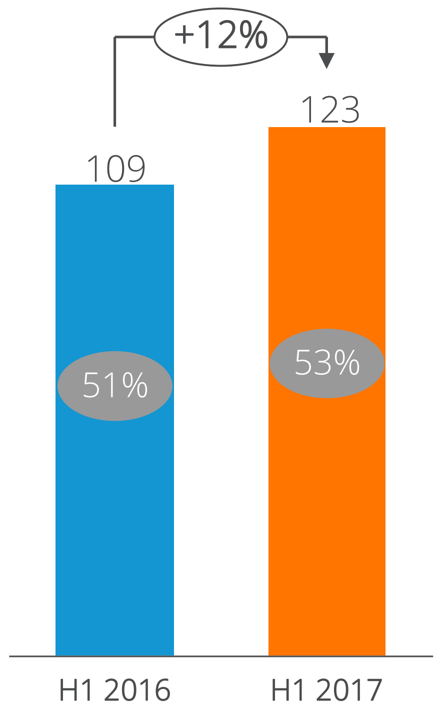
Key Financial Highlights

Strong organic revenue growth...



Group Revenues

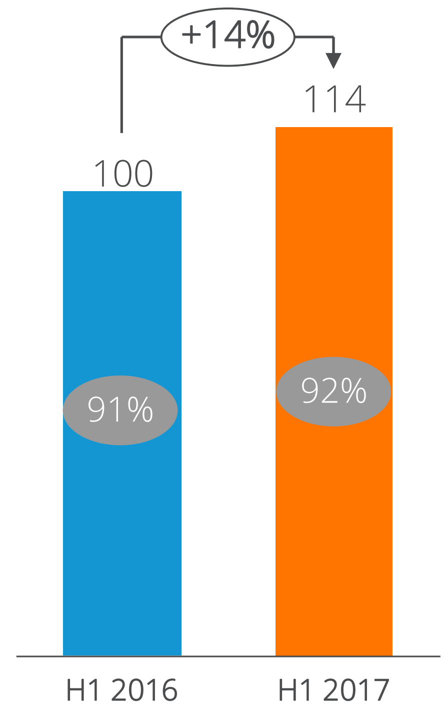
...sustainable profitability...



Group ordinary operating EBITDA[1]

ooEBITDA margin

...and robust & visible cash flows



Group cash contribution[2]

Cash Conversion[2]

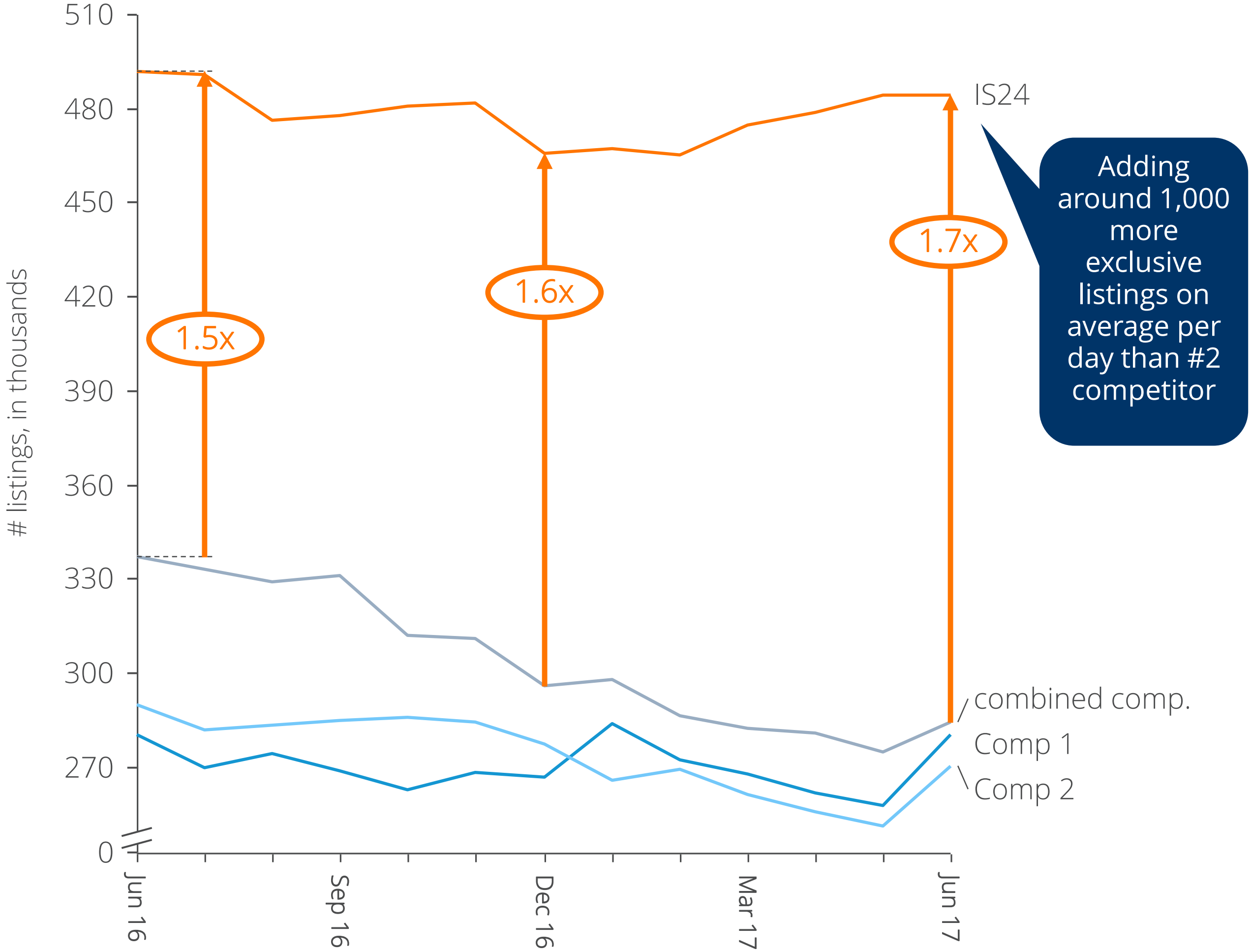
Note: All figures in € millions.

1. Ordinary operating (oo)EBITDA represents EBITDA adjusted for non-operating and special effects, ordinary operating EBITDA margin of a segment is defined as ordinary operating EBITDA as a percentage of external segment revenues.
2. Cash contribution is defined as ooEBITDA less Capital expenditures, cash conversion as ooEBITDA / (ooEBITDA less Capital expenditures)

ImmobilienScout24

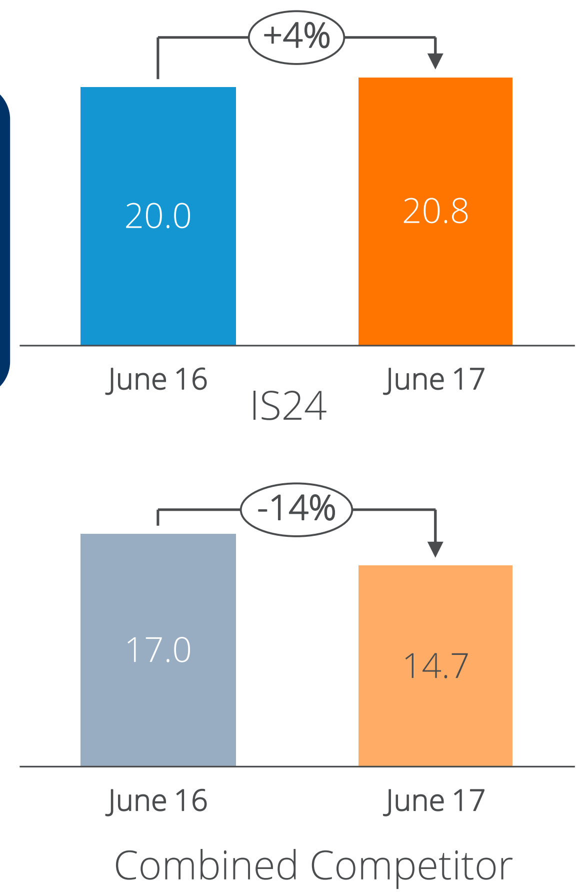
Listings → Traffic → Monetization

Listings position



Listings per Customer

based on total customers



Source: Management estimates, internal data. Customers with at least one active listing at the respective date (usually end of month).

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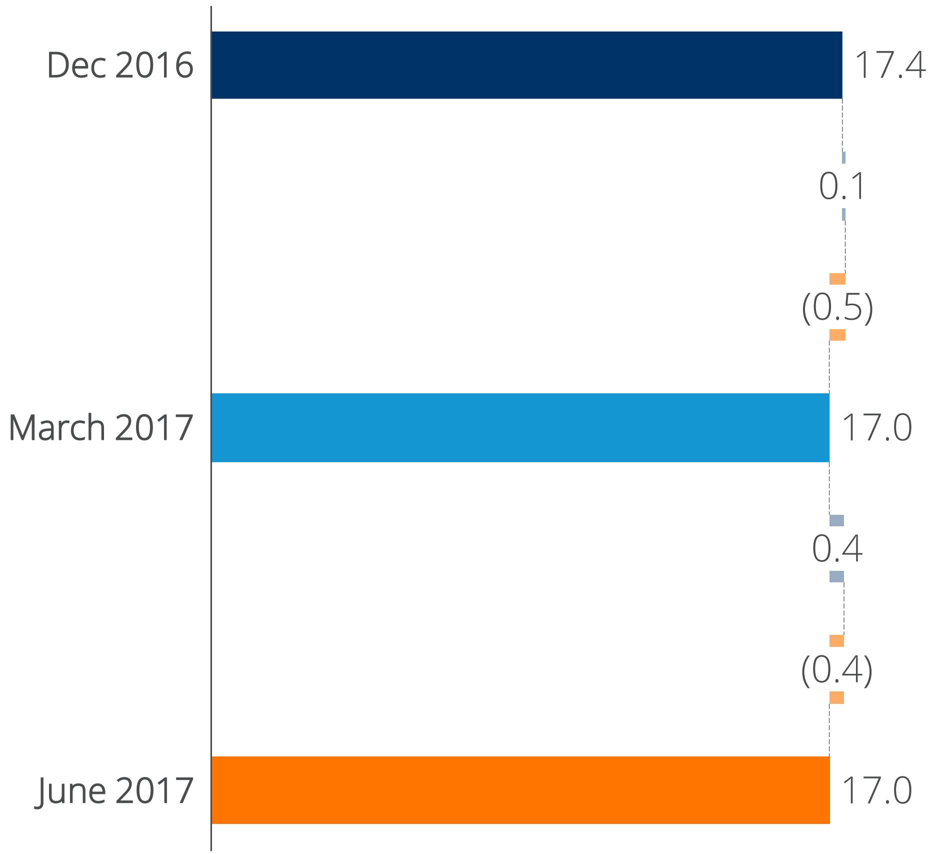
Listings → Traffic → Monetization



- **Core agent** numbers **stable** in Q2 2017
- Excluding agents leaving the business, **core agent numbers increasing** Q2 2017 (+0.4)
- **Churn rate on record low level**
- **Significant increase in customer winback rate** (based on monthly run rate) in Q2 2017

Net loss/gain excl. Agents leaving the business[1]

Agents leaving the business / inactive Agents

Source: Management estimates, internal data.

1. No listings at any online sources 4 months after inactivation at IS24.

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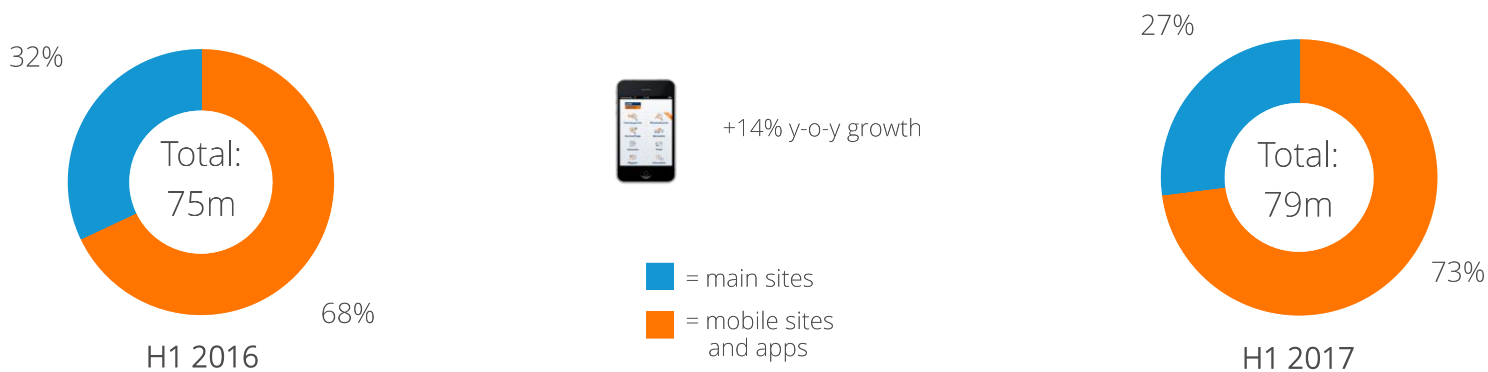
Listings → Traffic → Monetization

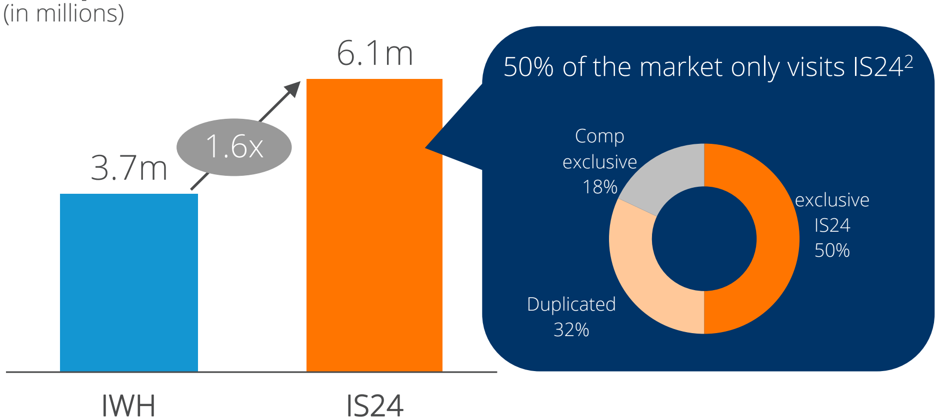
Traffic Evolution[1]

(visits in millions)



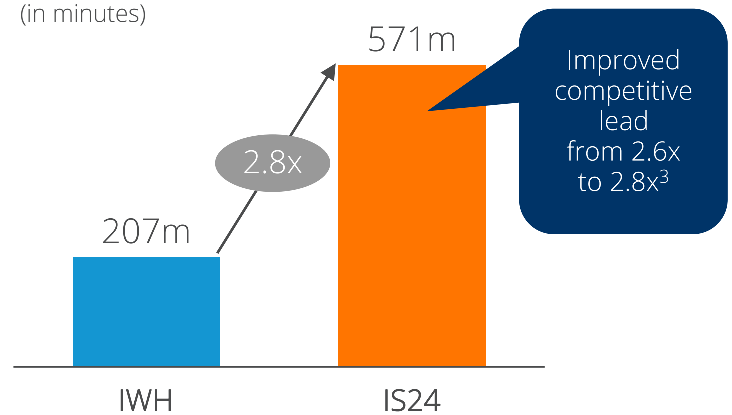
Unique Visitors (H1 2017)[2]

(in millions)



Time Spent (H1 2017)[2]

(in minutes)



1. Management estimates, based on average monthly visits (sessions) the IS24 platform from mobile devices, mobile and all IS24 applications as measured by own traffic monitor (google analytics,)
2. Based on average Unique Monthly Visitors ("UMV") for traffic and total time spent for engagement in H1 2017, comScore MMX May 2017 (desktop only for traffic and desktop and mobile for engagement). H1 2017 average based on January – May data.
3. Compared to December 2016, comScore MMX May 2017.

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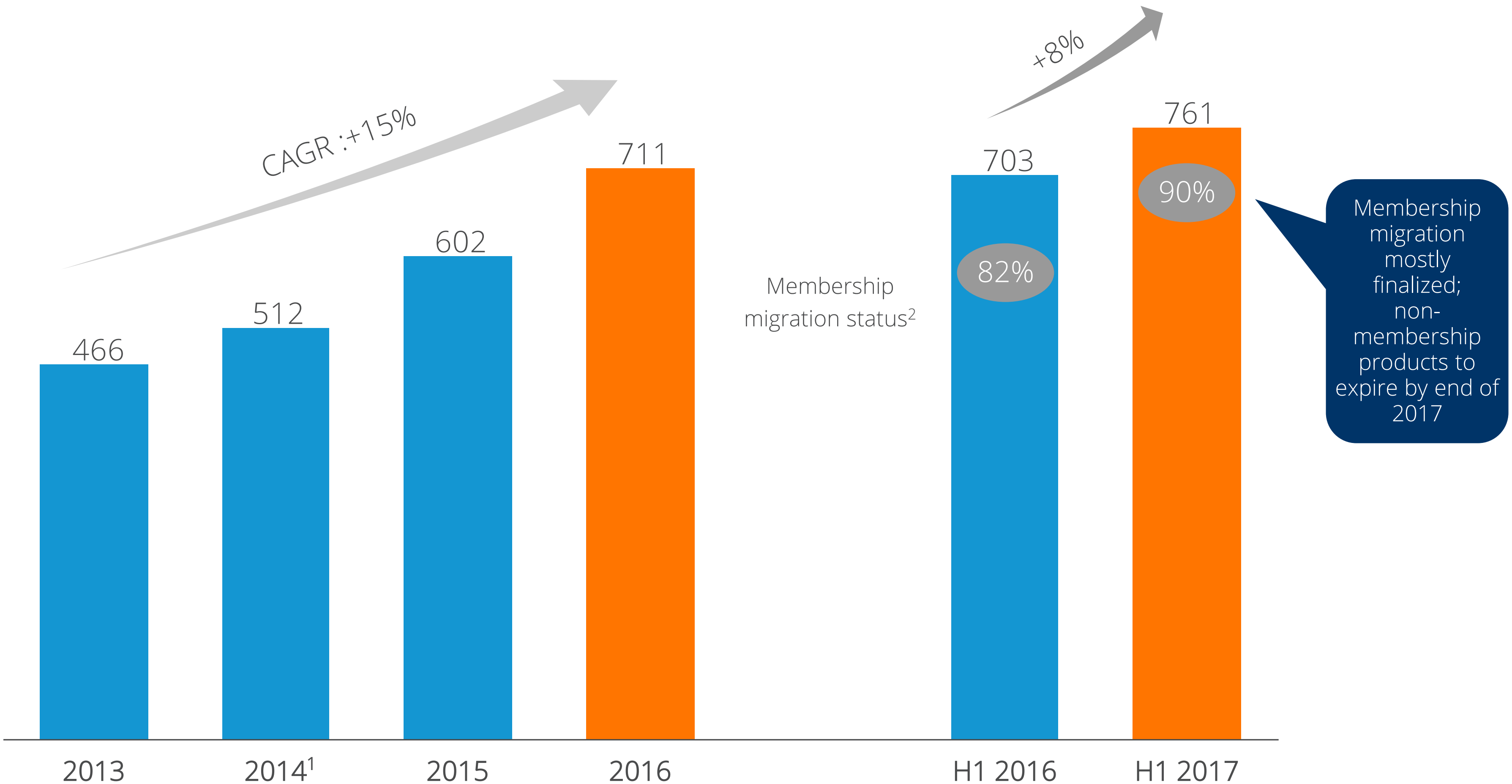
Listings → Traffic → **Monetization**

ARPU Evolution
(ARPU in €/month)



1. Given the Group's complex financial history, to facilitate year-on-year comparison and to better represent the business trends and situation of Scout24, additional, voluntary disclosure has been provided for the twelve-month period ended December 31, 2014. These figures represent the sum of financials from the audited consolidated financial statements of Scout24 Holding GmbH for the short financial year from January 1, 2014 until March 31, 2014 and from the audited consolidated financial statements of Asa NewCo GmbH for the period of April 1, 2014 to December 31, 2014.
2. % of Core Agents, targeted for migration, migrated to the membership model as per June 2017

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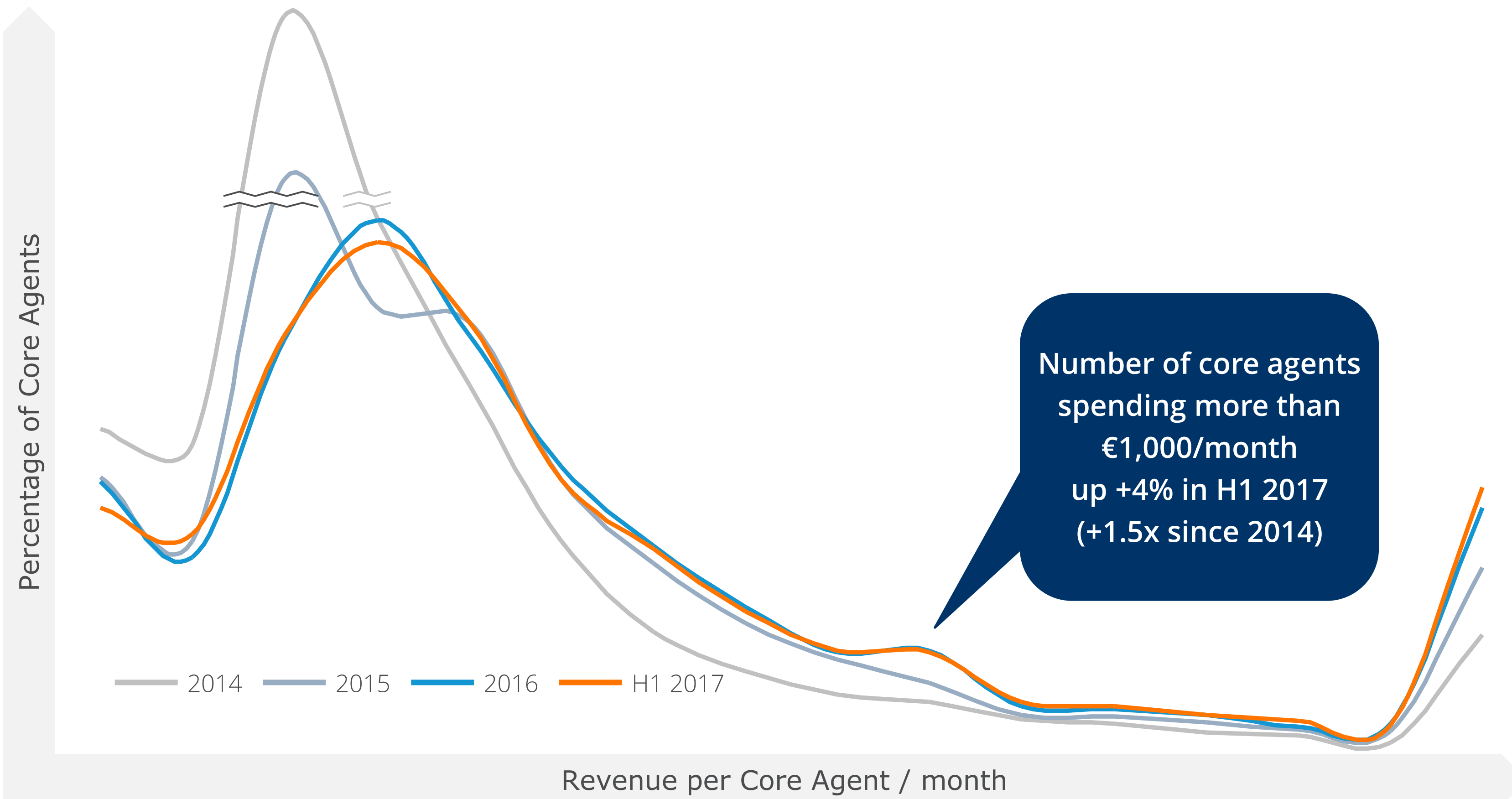
Listings → Traffic → **Monetization**

More and more of our core agents are recognizing our value proposition



Sources: Internal customer database. Data as per December of the respective year.

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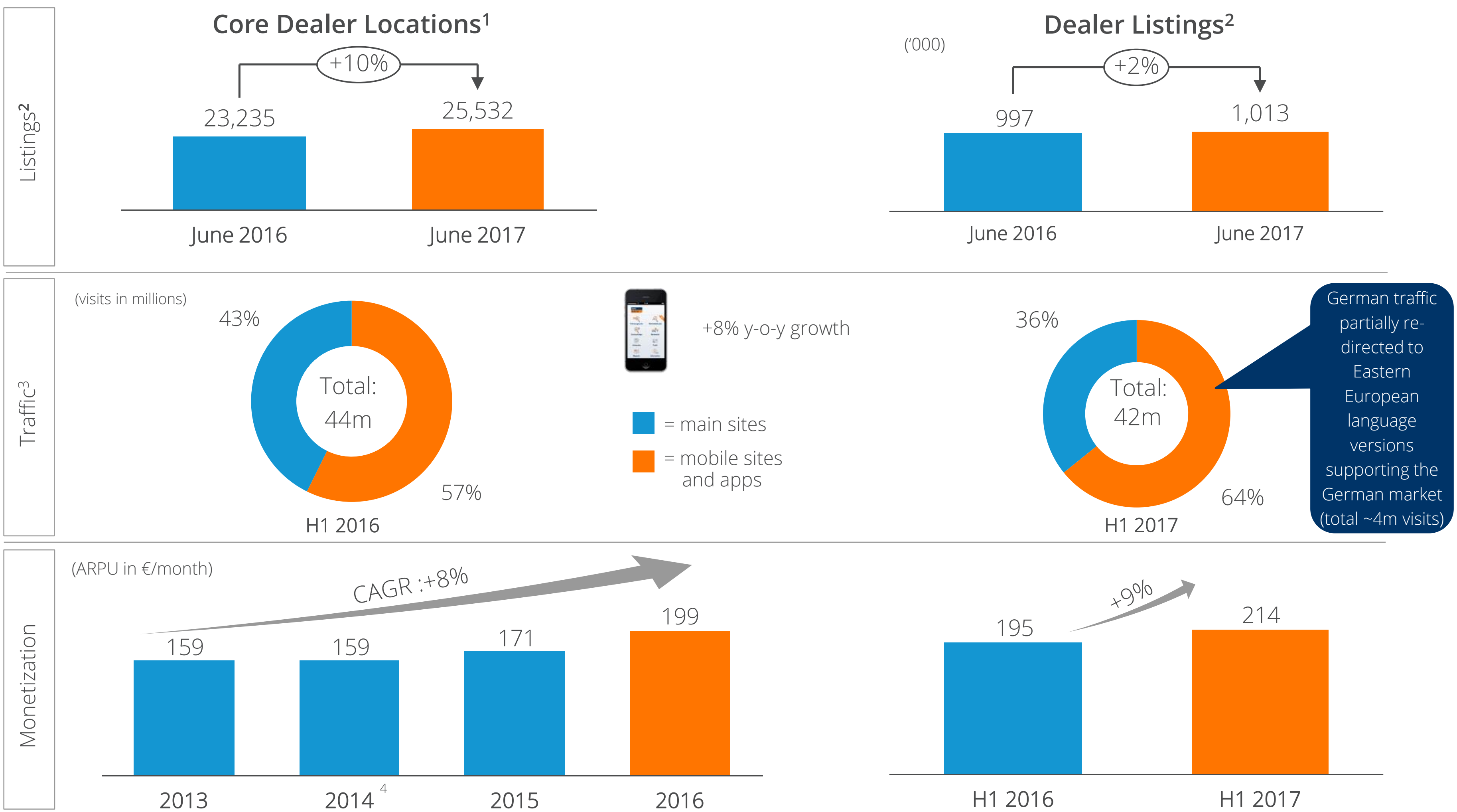
ImmobilienScout24
Wrap-Up

What We Have Delivered	What We Are Working On
Increased listings market share ✓	Leveraging regional product and pricing strategy
Successful roll-out of major product innovations ✓	Support product innovations with marketing
First success in VIA upsell in residential market segment ✓	Continue to drive VIA usage and further expand ARPU
Successfully implemented initiatives to improve sales performance ✓	Drive sales force performance

AutoScout24

Focus on Germany – Strengthening Market Positioning



1. Management estimates, based on internal data.
2. Autobiz, June 2017; Dealer listings only / not considering private listings due to on-time effect of adjusting duration time
3. Management estimates, based on average monthly visits (sessions) to the AS24 platform from mobile devices, mobile and all AS24 applications as measured by own traffic monitor (google analytics)
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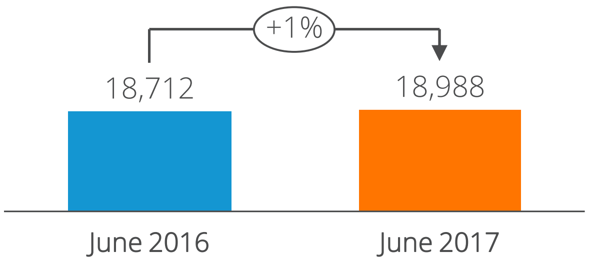
AutoScout24

Focus on Italy & Benelux – Cementing our Leadership Positions

Listings[2]

Core Dealer Locations[1]



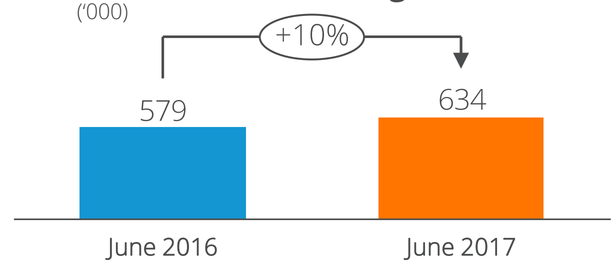
+14% Listings growth[2]
1.6x vs. #2

+6% Listings growth [2]
1.5x vs. #2

+4% Listings growth[2]
2.0x vs. #2

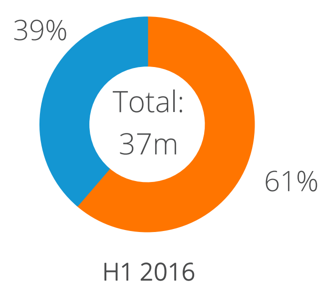
Dealer Listings[2]

('000)



Traffic[3]

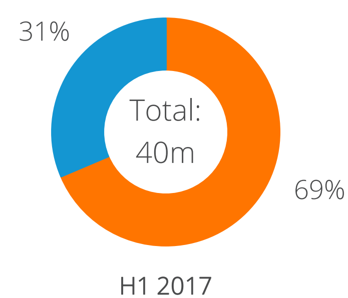
(visits in millions)



+19% y-o-y growth

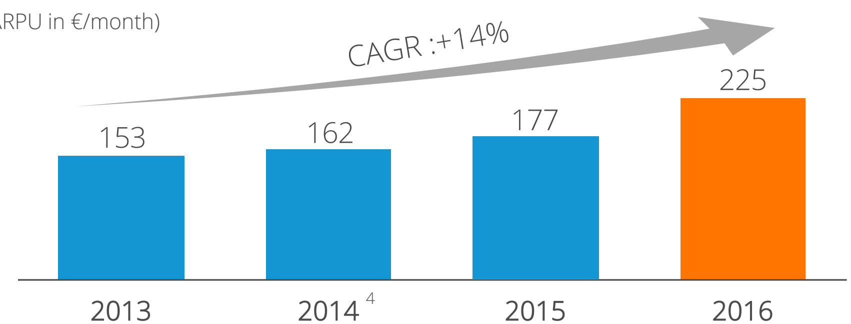
= main sites

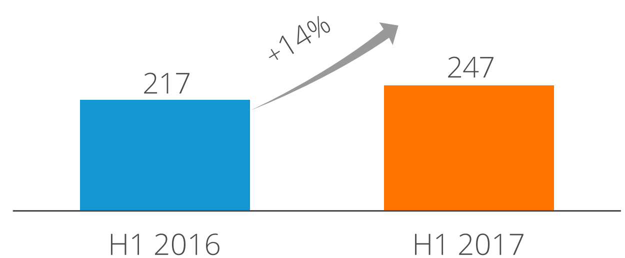
= mobile sites and apps



Monetization

(ARPU in €/month)





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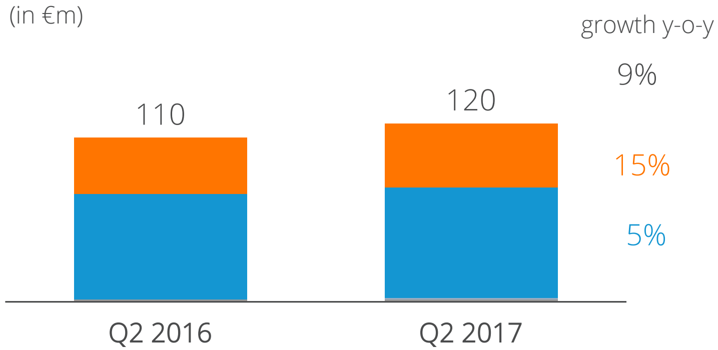
AutoScout24
Wrap-Up

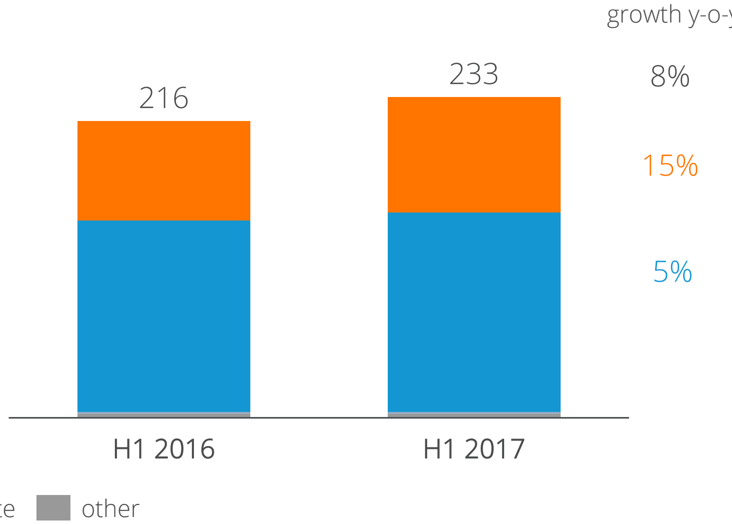
What We Have Delivered	What We Are Working On
Closing the gap on dealer locations to our competition in Germany ✓	Further execute on sales strategy to narrow content gap
Creating tangible USPs/ differentiation points vs. our competition in Germany ✓	Further leverage USPs to narrow traffic and content gap vs. our competition
Marketing Power pricing model successfully implemented ✓	Further increase penetration of Marketing power products and enhance Marketing power product range
Strengthening of market leading position in Italy and BeNeLux ✓	Drive monetization of leadership position

Financial Review

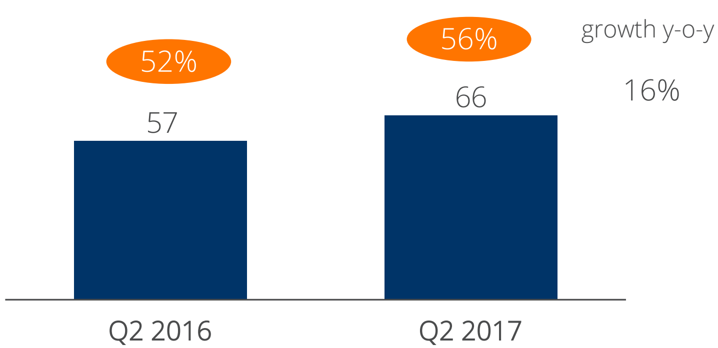
Group
Strong organic growth and sustainable profitability

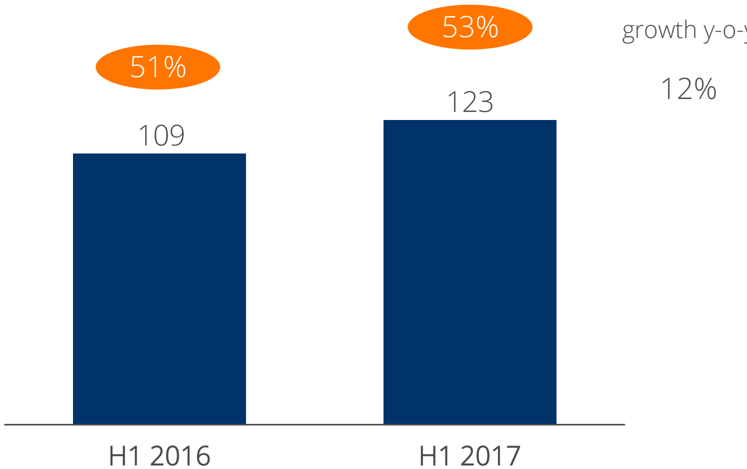
Revenues





ordinary operating EBITDA





xx% ooEBITDA margin

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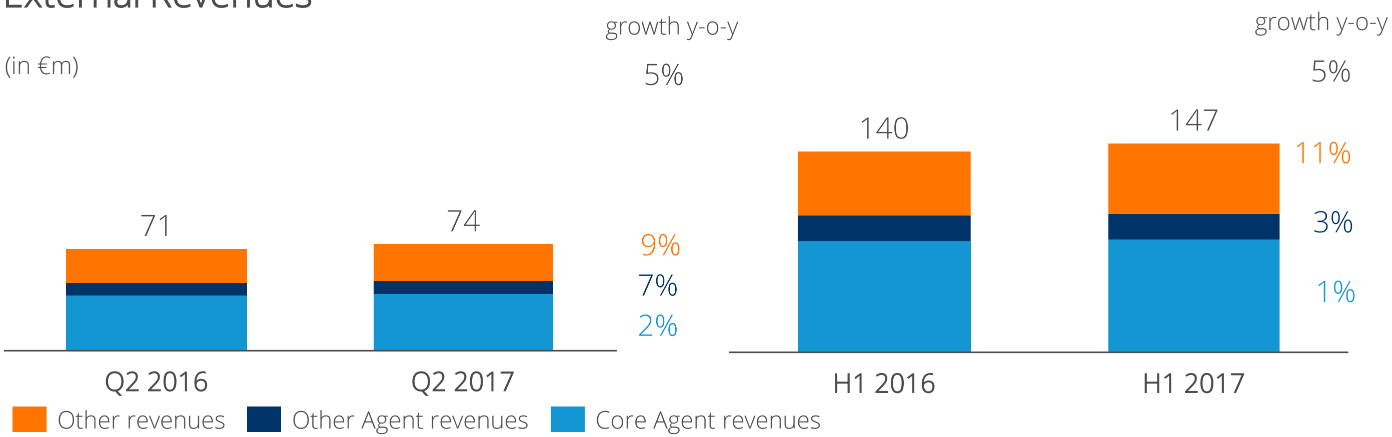
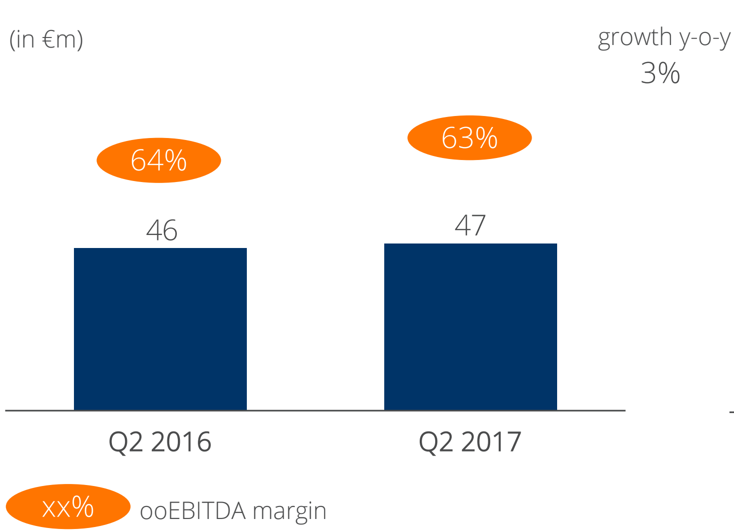
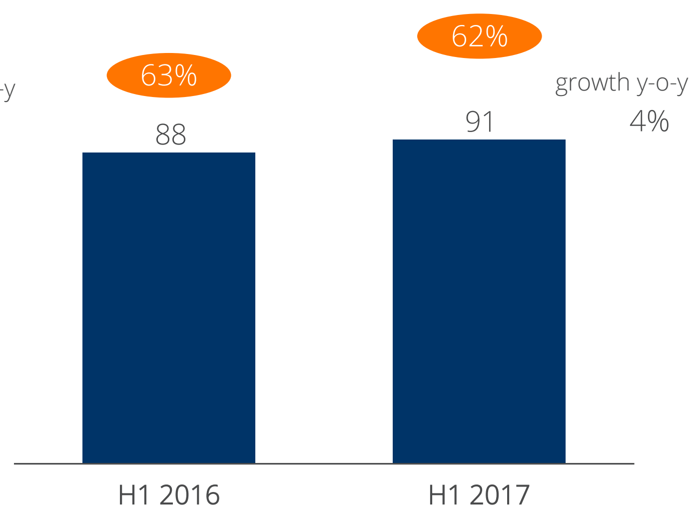
Platform for Continued Growth

External Revenues



ordinary operating EBITDA





Key highlights

Core Agent revenues

- Core agent revenues show stable development compared to Q1 2017 reflecting improvement in core agent trends
- Ongoing solid ARPU increase

Other Agent revenues

- Dynamic revenue growth in Austrian marketplace and stable growth in professional pay-per-ad business

Other revenues

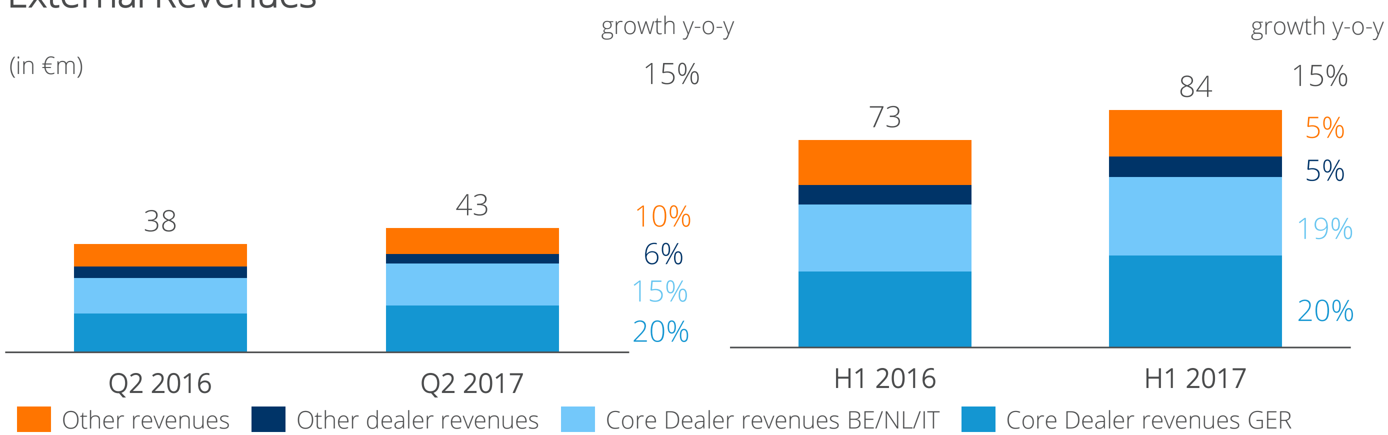
- Consumer monetization initiatives under the roof of Scout24 Media driving growth

ooEBITDA

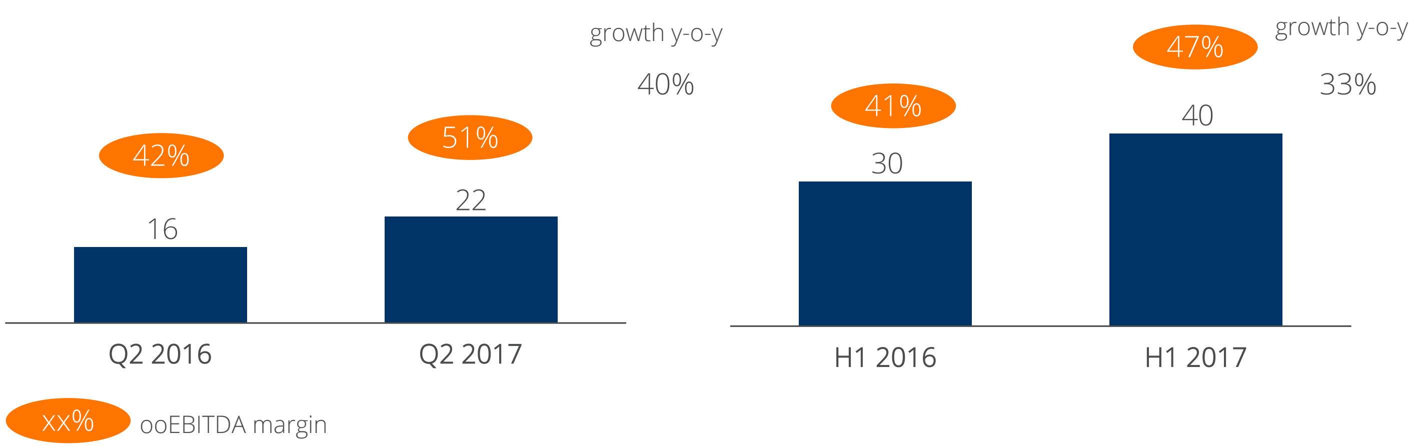
- ooEBITDA margin reflecting the investments in product innovation

AutoScout24
Delivering on Growth Potential

External Revenues



ordinary operating EBITDA



Key highlights

Core Dealer revenues

- Strong ARPU expansion in Germany and Benelux/Italy on the back of implemented price increases and ongoing MIA penetration
- Increasing dealer base, especially in Germany

Other Dealer revenues

- Ongoing success of visibility products in smaller European countries

Other revenues

- Solid revenue growth in display revenues in Q2 2017

ooEBITDA

- Revenue growth combined with operational gearing drive margin increase

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Ordinary Operating Cost

(in €m)	H1 2016	H1 2017
Revenues	**215.9**	**233.4**
Own work capitalised	5.5	5.8
Personnel (incl. external labour)	(58.8)	(60.6)
Marketing (online & offline)	(24.5)	(25.9)
IT	(8.4)	(7.8)
Other costs	(20.3)	(22.0)
Total operating cost	**(106.5)**	**(110.6)**
Ordinary operating EBITDA	**109.4**	**122.8**
Ordinary operating EBITDA-margin	**50.7%**	**52.6%**

Comments

- increase driven by regular salary increase as well as talent upgrade
- Marketing expenses reflecting certain investments in product innovation

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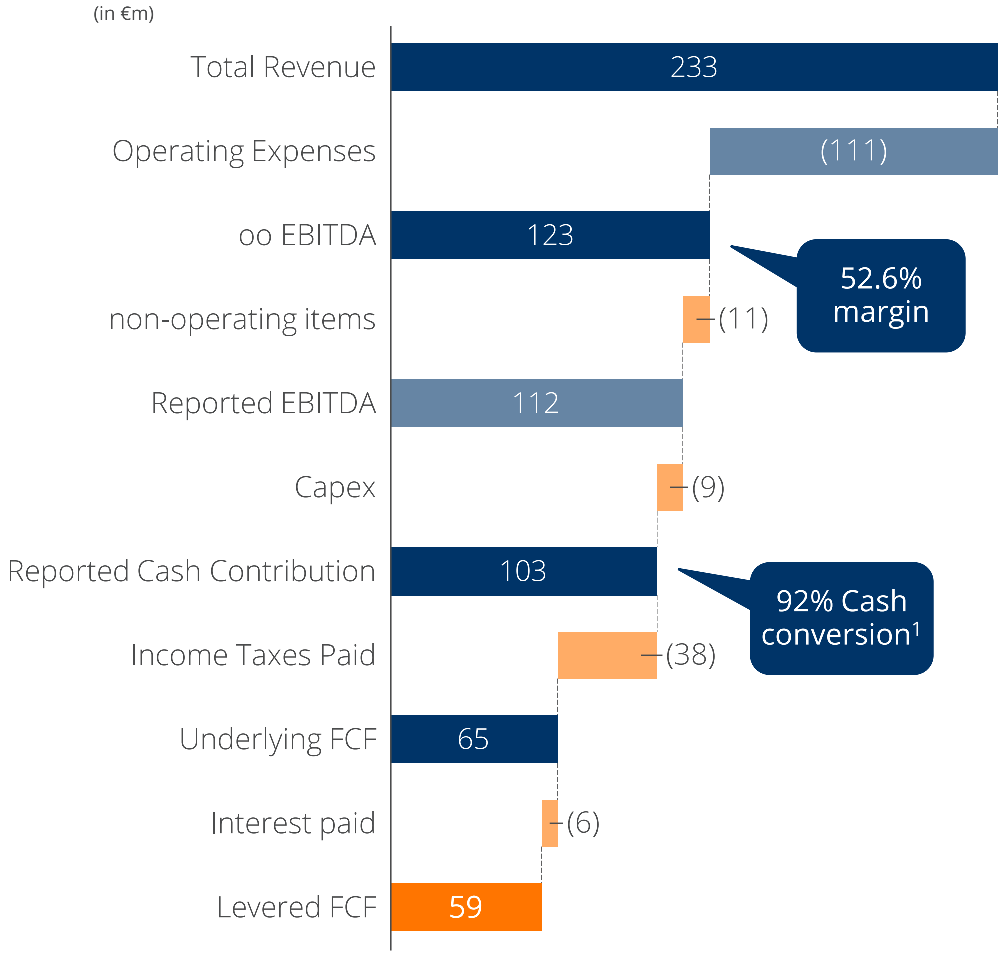
Strong Free Cash Flow Generation

Revenue to Free Cash Flow Bridge (H1 2017)



- Solid topline driven by organic growth
- Operating leverage
- Limited capex requirements
- To approach statutory corporate rate
- deleveraging and significantly improved cost of debt
- Potential for outsized net cash flow growth

1. Cash conversion is defined as (ooEBITDA less Capital Expenditure) / ooEBITDA .

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Below EBITDA Items

(in €m)	H1 2016	H1 2017
Ordinary operating EBITDA	**109.4**	**122.8**
Non-operating items	(9.6)	(10.7)
Reported EBITDA	**99.7**	**112.1**
D&A	(7.7)	(8.8)
PPA Effect: D&A on PPA items	(24.7)	(19.6)
EBIT	**67.3**	**83.8**
Results Equity Method	(0.0)	(0.0)
Interest: Finance Income	0.0	3.4
Interest: Finance Cost	(23.1)	(7.1)
Earnings before Tax	**44.3**	**80.1**
Taxes: Taxes on Income	(14.9)	(25.2)
Earnings after Tax	**29.5**	**54.9**
Earnings per Share (in €)	**0.28**	**0.51**
Adjusted Earnings[1]	**53.7**	**73.5**
Earnings per Share adjusted (in €)[1]	**0.50**	**0.68**

Comments

- include €2.2m effect from share-based compensation (Management Equity Programmes), €1.5 m performance based compensation stemming from a purchase price agreement, €1.8m of cost relating to M&A, €4.9 m personnel cost relating to the reorganisation

- Amortisation of PPA items decreasing as technology asset fully amortised

- Significantly reduced interest rate
- H1 2016 including €5.1 million expense from derivative instruments, H1 2017 with €1.5 million gain (0% floor on EURIBOR, non-cash relevant)
- H1 2017 including one-time gain of €1.9m in interest refund deriving from 2011

- Effective tax rate of 31.0% (slightly lower than normalized rate of 31.3%)

1. Unaudited. Excluding Non-recurring items and D&A on PPA items, calculated with normalized tax rate. Detailed reconciliation in appendix.

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Capital structure

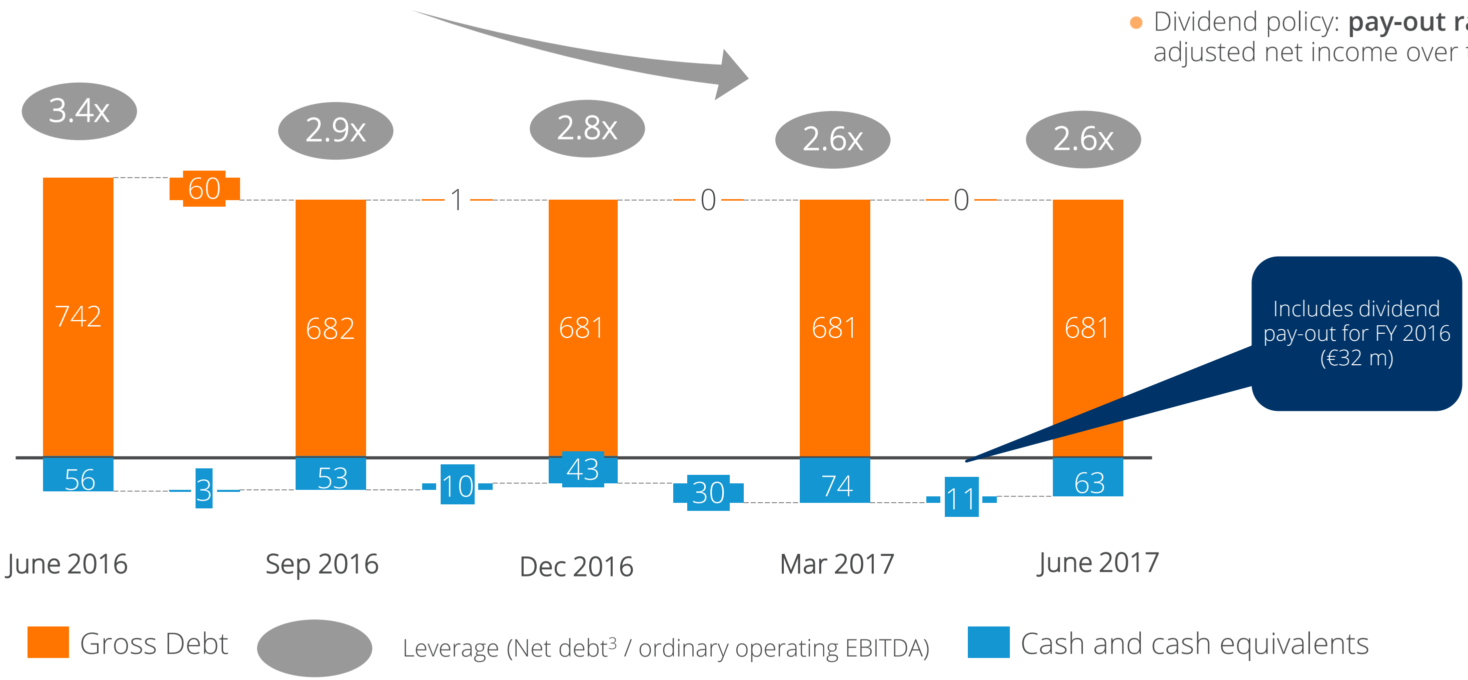
Strong deleveraging profile and low interest margins supporting dividend payment

Margin ratchet thresholds

Leverage (Net Debt/EBITDA)	Margin[1] Term Loan	Revolving Facility[2]
>3.00x	2.00%	1.60%
>2.50x	1.70%	1.30%
>2.00x	1.50%	1.10%
>1.50x	1.30%	0.90%
>1.00x	1.10%	0.70%
<1.00x	0.90%	0.50%

Key highlights

- Refinancing end of 2016 significantly improved interest margins (H1 2017: 1.7% syndicated loan and 1.3 % revolving credit facility; H1 2016: 3.75% average throughout the period)
- As business de-levers over time, margin ratchet will reduce interest expense further
- Targeted leverage ratio of 1.5x to 1.0x over time
- Dividend policy: **pay-out ratio of 30.0% to 50.0%** of adjusted net income over time



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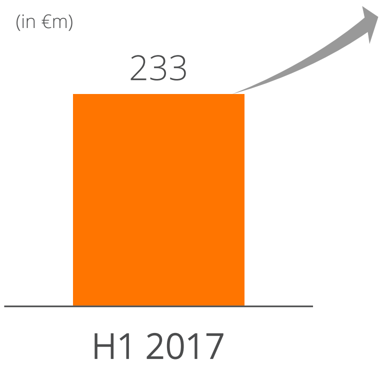
1. Leverage test on a quarterly basis with new spread applicable 45 days post quarter end
2. Revolving Facility is subject to a utilisation fee depending of the amount drawn (<33.3% : 0.1% , <66.7% : 0.2% , >66.7% : 0.4%)
3. Net debt is defined as total debt (current and non-current liabilities) less cash and cash equivalents

Outlook Full Year 2017

Reiterating full year outlook

Revenues

(in €m)

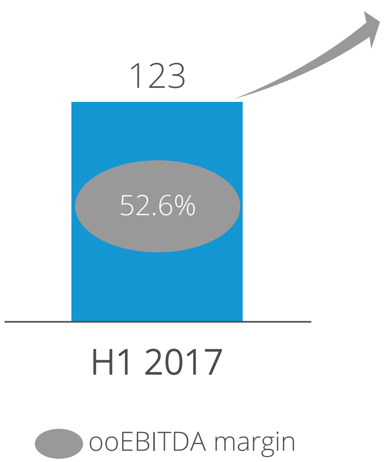


Group revenues expected to record **high-single-digit** percentage growth rate

- **IS24** is expected to achieve **a mid-single** percentage revenue growth rate, revenue growth weighted towards second half 2017 with acceleration to **a mid-single-digit** growth rate
- **AS24** is expected to grow revenues at **mid-teens** percentage rate

ordinary operating EBITDA

(in €m)



Group ooEBITDA margin is expected **to increase by around one percentage point**

- **IS24** is expected to achieve an ordinary operating EBITDA margin on a **slightly lower (but, at least 61.5%) or comparable level** than in 2016
- **AS24** margin expected **to expand by at least five percentage points**

Q&A

Reconciliation Adjusted Earnings

(EUR millions)	H1 2016	H1 2017
Earnings before Tax	**44.3**	**80.1**
Add back non-operating items	9.6	10.7
Add back D&A on PPA items	24.7	19.6
Add back extraordinary finance expense/ income and effects from derivative instruments	5.0	(3.4)
Deduct Profit from disposal of investments accounted for using the equity method	(0.0)	(0.0)
Adjusted Earnings before Tax	**83.7**	**107.1**
Adjusted Tax based on normalized Tax rate	(26.4)	(33.5)
Non-Controlling interest	(0.2)	-
Adjusted Earnings attributable to owners of the parent	**57.1**	**73.5**
Earnings per Share adjusted (in €)[1]	**0.53**	**0.68**
Weighted average of shares (in million)	107.6	107.6

Based on relevant nominal tax rate as stated in Annual Report 2015 and 2016 respectively.

Q2 2016: 31.30%;
Q2 2017: 31.33%

Voluntary information. unaudited. not reviewed.

Key performance indicators IS24

(in EUR million, unless otherwise stated)	Q2 2016	Q2 2017	+/-	H1 2016	H1 2017	+/-
Revenues from core agents (Germany)	38.8	39.4	1.5 %	77.9	78.7	1.0 %
Revenues from other agents	8.9	9.5	6.7 %	17.4	17.9	2.9 %
Other revenues	23.4	25.5	9.0 %	44.9	50.0	11.4 %
Total external revenues	**71.1**	**74.5**	**4.8 %**	**140.2**	**146.6**	**4.6 %**
Ordinary operating EBITDA	**45.5**	**46.9**	**3.1 %**	**87.9**	**91.4**	**4.0 %**
Ordinary operating EBITDA - margin %	**64.0%**	**63.1%**	**(0.9)pp**	**62.7%**	**62.4%**	**(0.3)pp**
EBITDA	**40.2**	**43.7**	**8.7 %**	**79.5**	**84.8**	**6.7 %**
Capital expenditure	**2.6**	**2.8**	**7.7 %**	**5.2**	**5.3**	**1.9 %**

SCOUT 24

Key performance indicators AS24

(in EUR million, unless otherwise stated)	Q2 2016	Q2 2017	+/-	H1 2016	H1 2017	+/-
Revenues from core dealers (Germany)	13.5	16.2	20.0 %	26.7	32.1	20.2 %
Revenues from core dealers (Benelux/Italy)	12.6	14.5	15.1 %	23.5	27.9	18.7 %
Revenues from other dealers	3.4	3.6	5.9 %	6.7	7.0	4.5 %
Other revenues	8.2	9.0	9.8 %	15.8	16.6	5.1 %
Total external revenues	**37.6**	**43.3**	**15.2 %**	**72.7**	**83.7**	**15.1 %**
Ordinary operating EBITDA	**15.9**	**22.3**	**40.3 %**	**29.8**	**39.6**	**32.9 %**
Ordinary operating EBITDA - margin %	**42.3 %**	**51.4 %**	**9.1pp**	**41.0 %**	**47.3 %**	**6.3pp**
EBITDA	**13.4**	**19.5**	**45.5 %**	**26.0**	**34.8**	**33.8 %**
Capital expenditure	**2.0**	**2.4**	**20.0 %**	**4.3**	**3.6**	**(16.3) %**

Income Statement

(EUR millions)	H1 2016	H1 2017
Revenues	**215.9**	**233.4**
Own work capitalised	5.5	5.8
Other operating income	0.8	0.3
Total operating performance	**222.1**	**239.5**
Personnel expenses	(55.0)	(58.4)
Advertising expenses	(24.6)	(25.9)
IT expenses[1]	(8.4)	(7.8)
Other operating expenses	(34.3)	(35.2)
EBITDA (Earnings before interest. tax. depreciation and amortisation)	**99.7**	**112.1**
Depreciation. amortisation and impairment losses	(32.4)	(28.3)
EBIT (Earnings before interest and tax)	**67.3**	**83.8**
Net financial result	**(23.0)**	**(3.7)**
Earnings before tax	**44.3**	**80.1**
Income taxes	(14.9)	(25.2)
Earnings after tax	**29.5**	**54.9**
Earnings per share (EUR)	**0.28**	**0.51**

1. The following change has occurred compared with the Group interim report on the first half of 2016: to enhance transparency, as of 1 January 2017 a reclassification of other operating expenses to IT expenses was implemented.

Balance Sheet 1/2

Assets (EUR '000)	12/31/2016	06/30/2017
Current assets	**96.2**	**117.1**
Cash and cash equivalents	43.4	62.7
Trade receivables	43.3	42.9
Financial assets	0.4	0.7
Income tax receivables	1.2	1.0
Other assets	7.8	9.8
Non-current assets	**2,034.7**	**2,016.5**
Goodwill	816.2	861.2
Trademarks	983.5	983.4
Other intangible assets	217.6	199.8
Property, plant and equipment	10.0	8.8
Investments accounted for using the equity method	1.7	2.7
Financial assets	0.5	0.5
Deferred tax assets	3.5	2.3
Other assets	1.8	2.7
Total assets	**2,130.9**	**2,133.6**

Balance Sheet 2/2

Equity and liabilities (EUR '000)	12/31/2016	06/30/2017
Current liabilities	**112.3**	**99.1**
Trade payables	27.9	19.9
Financial liabilities	31.8	32.1
Other provisions	4.0	5.5
Income tax liabilities	15.9	6.9
Other liabilities	32.7	34.8
Non-current liabilities	**1,027.8**	**1,019.9**
Financial liabilities	645.5	645.3
Pension and similar obligations	0.4	0.5
Other provisions	0.6	0.6
Income tax liabilities	0.0	0.0
Deferred tax liabilities	378.6	371.1
Other liabilities	2.6	2.3
Equity	**990.8**	**1,014.6**
Subscribed share capital	107.6	107.6
Capital reserve	427.6	428.4
Retained earnings	455.0	477.7
Measurement of pension obligations	(0.1)	(0.1)
Other reserves	1.1	1.1
Treasury shares (13,400 and 0 shares respectively)	(0.5)	-
Equity attributable to shareholders of parent company	990.8	1,014.6
Non-controlling interests	-	-
Total equity and liabilities	**2,130.9**	**2,133.6**

SCOUT 24

Cash Flow Statement 1/2

(EUR millions)	01/01/16 - 06/30/16	01/01/17 - 06/30/17
Earnings after tax	**29.5**	**54.9**
Depreciation. amortisation and impairment losses	32.4	28.3
Income tax expense/(income)	14.9	25.2
Financial income[1]	(0.1)	(3.4)
Financial expenses[1]	23.1	7.1
Result from investments accounted for using the equity method	0.0	0.0
Result on disposal of intangible assets and property. plant and equipment	(0.0)	0.0
Other non-cash transactions	2.4	1.2
Change in other assets not attributable to investing or financing activities	(0.4)	(2.6)
Change in other liabilities not attributable to investing or financing activities	(13.1)	(6.2)
Change in provisions	(0.6)	1.5
Income tax paid	(7.6)	(38.5)
Cash flow from operating activities	**80.5**	**67.6**
Purchases of intangible assets	(8.6)	(8.2)
Purchases of property. plant and equipment	(1.0)	(1.2)
Proceeds from disposal of intangible assets and property. plant and equipment	0.0	0.1
Payments made for investments in financial assets	-	(0.3)
Proceeds from sale of financial assets	0.2	0.0
Payments made to acquire subsidiaries	-	(0.4)
Payments made in connection with disposal of investments accounted for using the equity method	(29.5)	-
Interest received	0.0	0.0
Proceeds from disposal of discontinued activities	0.0	-
Cash flow from investing activities	**(38.8)**	**(9.9)**

1. The previous year's figures has been adjusted: the previously separately reported interest income and interest expense figures as well as the other financial result are now shown as part of financial income and expenses.

SCOUT 24

Cash Flow Statement 2/2

(EUR millions)	01/01/16 - 06/30/16	01/01/17 - 06/30/17
Cash flow from investing activities	**(38.8)**	**(9.9)**
Repayment of short-term financial liabilities	(40.1)	(0.1)
Interest paid	(15.8)	(6.1)
Dividends paid	-	(32.3)
Cash flow from financing activities	**(55.9)**	**(38.5)**
Effect of foreign exchange rate changes on cash and cash equivalents	(0.0)	(0.0)
Change in cash and cash equivalents	**(14.3)**	**19.2**
Cash and cash equivalents at beginning of period	**70.6**	**43.4**
Cash and cash equivalents at end of period	**56.4**	**62.7**

IR Contact details and financial calendar

Financial Calendar (expected)

Wednesday 8 November 2017	Interim Report Q3 2017
Tuesday 14 November 2017	Capital Markets Day

Half year report 2016
http://www.scout24.com/en/Investor-Relations/Financial-Publications/Financial-Reports/Financial-reports.aspx

Full year report 2016
report.scout24.com/2016

Investor Relations Contact

Britta Schmidt
Vice President Investor Relations & Treasury

Diana Apostol
Junior Manager Investor Relations

Tel : +49 89 444 56 3278 ; Fax : +49 89 444 56 193278; Email : ir@scout24.com