General overview
The company behind **universally recognised** brands
About La Française des Jeux *

France's leader in gambling and games of chance

Monopoly operator of lottery games and sports betting at points of sale

Authorised operator for online sports betting

2nd largest lottery in Europe

4th largest lottery worldwide

*FDJ
<table>
<thead>
<tr>
<th><strong>2018 key figures</strong></th>
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<tbody>
<tr>
<td>€15.8 billion</td>
<td>in player stakes</td>
<td></td>
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<td>25 million</td>
<td>customers</td>
<td></td>
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<td>2,500*</td>
<td>Group employees with &gt;800 in the sales function and &gt;550 in the technology function</td>
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<tr>
<td>€1.8 billion</td>
<td>in revenue</td>
<td></td>
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<tr>
<td>€315 million in EBITDA**</td>
<td>(18% margin)</td>
<td></td>
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<td>&gt;30,000</td>
<td>points of sale in 11,000 towns and cities</td>
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<tr>
<td>97%***</td>
<td>of French people 18 and over know about FDJ</td>
<td></td>
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</table>

*at 30 June 2019
**Earnings before interest, taxes, depreciation and amortisation
***2018 image scale
5. **2018 key figures**

- **5 sites**: Boulogne-Billancourt (Paris region), location of FDJ’s head office, the Corporate Foundation, the subsidiaries and an incubator with 20 start-ups
  - VILLEPinte (Paris region)
  - VITrolles (Marseille region)
  - SAINT-Witz (Paris region)
  - FDJ Gaming Solutions (London)

- **1 Corporate Foundation**

- **39 retail branches**
6. **Technological expertise**

- Over 550 employees in information systems
- **ISO 27001** (information security)
- **€250 million** invested in the information system (FDJ 2015-2020 strategic plan)
- >4 billion transactions a year, or up to 1,000 transactions per second
- **1 dual data centre** based in Vitrolles
Share capital structure

- French State: 72%
- Union des Blessés de la Face et de la Tête (UBFT): 9.2%
- Other (individuals holding <5% of share capital): 4.2%
- FDJ employees' mutual fund: 5%
- Fédération Maginot: 9.6%
Inspired by the "Gueules Cassées" lottery, which was created in the aftermath of the First World War to help disfigured soldiers, the French State created the National Lottery in 1933.

La Française des Jeux was founded in 1991 and became FDJ in 2014.
9.

85 years of history

1836
Prohibition of all forms of lottery in France except for charitable causes

1933
The French National Lottery is created with the authorisation of the French State (Act of 31 May 1933 and Decree of 22 July 1933). The proceeds were used to help WW1 veterans and victims of agricultural calamities reintegrate into society.

1976
Loto® launched
An enormous success to this very day

1978
Creation of Société de la Loterie Nationale et du Loto National
SLNLN, a French semi-public company

1979
Loto® Sportif launched

1983
Tac O Tac launched

1985
SLNLN becomes France Loto
First scratch cards appear

1989
SLNLN becomes France Loto
La Française des Jeux

1989
SLNLN becomes France Loto
First scratch cards appear
85 years of history

2010
Online gambling (sports/horse betting and poker) opened to competition

2012
Launch of the umbrella brand illiko®
for all scratch card games

2014
La Française des Jeux becomes FDJ

2016
Loto® relaunched to celebrate the game’s 40th anniversary
Creation of the FDJ Gaming Solutions (FGS) trade mark

2018
Mission Patrimoine games launched

2004
Euro Millions® launched
The five founding values

**INNOVATIVE**
Reinventing oneself, thinking outside the box, suggesting new ideas every day.

**OPTIMISTIC**
Trusting in the future.

**IN TOUCH WITH PEOPLE**
Being present in every region and constantly listening to customer feedback.

**COMMMITTED**
Acting sustainably in everyone’s interest.

**RESPONSIBLE**
Managing growth while acting responsibly towards players.
A successful company
A diverse, multi-channel gaming offering (I)

- **€15.8 billion** Total player stakes, +4.4% vs 2017
  - 49% Scratch card games €7.7 billion
  - 32% Draw-based games €5.1 billion
  - 19% Sports bets €3 billion

Including €2.4 billion in digital stakes (15% of the total), through paperless play-slips on mobile applications.

2018 player stakes - Source: FDJ
A diverse, multi-channel gaming offering (II)

Draw-based games

Points of sale and online
- Two draws a week
- Special occasions
- Three draws a week
- Special occasions
- 10 participatory lotteries

Points of sale only
- Two draws a day

Online only
- Two draws a day

32%
A diverse, multi-channel gaming offering (III)

Scratch card offerings

- A constantly redesigned and enriched gaming offering
- A wide range of games from €0.50 Morpion to €15 Mission Patrimoine
- Twenty scratch games at points of sale and online
- Thirty online-only games
A diverse, multi-channel gaming offering (IV)

Two sports betting brands

- Fixed-odds betting for 26 sports
  - Loto Foot
- Fixed-odds betting for 33 sports
  - Live betting for 15 sports

19%
The prize winners

- €10.7 billion paid out to prize winners (68% of player stakes)
- 800,000 winners of €200 and more
- 198 millionaires in 2018
- 1 millionaire every 2 days
- 1 chance from 4 on average of winning in all illiko games
Open Innovation

Stimulating innovation by integrating the notion at every Group level to meet current and future challenges:

- Lab Inno
- Constantly looking out for new partners
- Investing in specialised investment funds, particularly for customer experience, entertainment, etc.

New generation games

An entertainment Accelerated Business Unit (ABU)

- Creating games and new entertainment experiences
- Organisation of eSport competitions
- App (mobile and tablet) production

Developing new services

A payment and services Accelerated Business Unit (ABU)

- Marketing of point-of-sale payment acceptance services (paying bills, account reloads, etc.)
- In partnership with the official POS trade confederation and State Tax & Finance Office, acceptance of cash and credit card payments for the treasury (taxes, fines, public utility bills)
FDJ Gaming Solutions (FGS)

B2B commercial brand, a wholly-owned subsidiary of FDJ Group, dedicated to the sale of new products and services abroad (especially to lottery and sports betting operators).

FGS is already a supplier to several lotteries around the world (Israel, Portugal, Switzerland, Canada).

LEIA (Lotteries Entertainment Innovation Alliance)

Alliance with the Danish, Finnish and Norwegian lotteries to create a digital gaming platform.
A responsible company
Developing a recreational gaming model

Preventing minors from gambling

Training and support
for retailers and the sales force to refuse sales to minors (100% of retailers trained in 2017-2018)

Preventive information for the general public
Starting in 2019, 10% of the group's television advertising spend is dedicated to Responsible Gaming, especially the protection of minors from gambling

Oversight of the point-of-sale network
via inspections
Developing a recreational gaming model

Prevention of problem gambling

Work on the offering and player experience starting with the product design phase. The highest possible level of vigilance ensures that the gaming experience is and remains recreational.

Tools provided to support players
- Playscan (online game playing evaluation tool)
- Game moderators to set limits
- Self-assessment of game playing

100% of points of sale and merchant sites carry out Responsible Gaming measures: booklets, prevention messages on posters in the checkout area, and on all formats distributed in points of sale.

Support for structures such as SOS Joueurs designed to help vulnerable groups and their friends and relatives. More than twenty Responsible Gaming academic or operational partnerships. Assistance with development and spreading of knowledge by supporting research into problem gambling.

100% compliance for Responsible Gaming certification by European Lotteries: Level 4 (highest level) and World Lottery Association (WLA).
Against fraud & money laundering

Over 4 billion transactions from gaming and payment of winnings underwent risk analysis

Establishment of a cash payment threshold
(€200 for scratch games and €300 for draw and sports games)

Inspection procedures for points of sale

Suspicious activity reported to Tracfin
FDJ is certified by the French standardisation authority (Afnor) for its policy in the fight against discrimination, especially against people with disabilities.

Since 2013

FDJ obtained the workplace gender equality label.

In 2017

Score obtained on the new "Egalité Femme/Homme" index (gender equality). (Act for the Freedom to Choose One’s Professional Future)
An ambitious Environmental policy

- **8%** drop in greenhouse gases in 10 years
- **100%** gaming formats certified with the FSC* label since 2012

**Partnership with WWF France**

since 2017 to raise awareness of the environment at points of sale

*FSC: Forest Stewardship Council
**WWF: World Wide Fund For Nature
A committed company
Games that benefit everyone

Players
€10.7 billion
(68% of player stakes)

Public financing
€3.5 billion
(1% of the French State budget)

Retailers
€785 million
Local communities

1st network in France

over 30,000 points of sale in 11,000 cities and towns

10 min over 90% of points of sale accessible in under 10 minutes

€785 million net compensation to retailers +5.7% vs 2017

€5.4 billion contribution to GDP (Gross Domestic Product)

52,500 jobs created or maintained including 20,350 in local bar-tobacconist-newsagent sales
Major historical contributor to French sport

€5 billion allocated since 1980 to the National Sports Development Centre (CNDS), which was merged into the National Agency for Sport (ANS) in 2019.

Inclusion of a “Sport Integrity” component in all of its sport partnerships

Loyal partner of French handball and basketball teams for over 10 years
French sport

Cycling for over 20 years
Groupama-FDJ World Tour and Continental men’s cycling teams
FDJ Nouvelle-Aquitaine Futuroscope women’s cycling team

The programme for high-level athletes
The FDJ Challenge, with over 400 athletes supported for 28 years and 162 Olympic and Paralympic medals, is getting stronger and became the FDJ Sport Factory in September 2019

Support for women’s sport
The Sport pour Elles programme promotes sport, supports high-level athletes, encourages media coverage and mobilises networks

Partnerships with Parions Sport
✔ Four football clubs (Olympique de Marseille, Olympique Lyonnais, FC Nantes and AS Monaco)
✔ The NBA (National Basketball Association)
2,000 sites are now under threat in France: churches, theatres, windmills, castles, fountains, etc.

When they play Mission Patrimoine games, French people contribute to their restoration throughout France.

€21 million paid out thanks to Mission Patrimoine games (Super Loto/scratch card games) in 2018.

269 buildings restored in 2018 (year 1).

€25 to €30 million 2019 goal: to renovate 121 sites.
A Corporate Foundation to promote equality of opportunity through gaming

Two areas of engagement
- Education
- Integration

For vulnerable persons in situations of
- Disabilities
- Low income
- Isolation

2018/2022
- Awards of €18 million over 5 years
- Notional projects with high social impact
- Several hundred local-scale projects
- A large number of fully engaged employees