

# Audinate 1H25

# Investor Presentation

Aidan Williams, CEO

Chris Rollinson, CFO

Approved by the Board of Audinate Group Limited

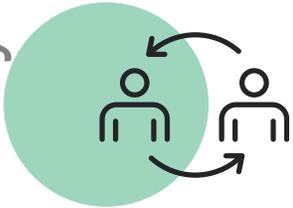
# Audinate 1H25 Highlights & Strategy

Aidan Williams, CEO

# 1H25: results above guidance



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FY25  
a year of transition

**Manufacturing customers are working through their accumulated inventory balances.** A strengthening in end user demand will drive future orders

**Challenging trading conditions** are expected to persist throughout FY25

**We anticipate a one-year transition period, with customers returning to regular ordering patterns in FY26**



Strong Underlying Growth Momentum

**Software revenue up 13%** – a key indicator of underlying growth, minimising the impact of inventory fluctuations

**Design wins increased 15%** – strengthening the foundation for future revenue expansion

**4,372 AV products in market**, with OEMs set to launch **196 new products** in 1H25, driving further adoption

**Consistently training 4,000 AV professionals per month**, with a robust **729K+ contacts** in our database, reinforcing industry engagement



Strategic Growth Driven by Three Key Pillars

**Audio, Video, and Platform Software** form the foundation of our long-term strategy

**Dante is the industry standard in digital audio networking**, with **12x the adoption** of its nearest competitor

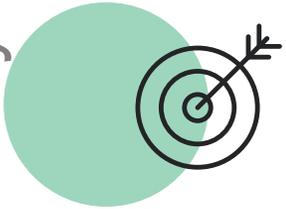
**Video and Platform Software are in the early stages of development**, presenting significant growth potential

**The shift from analogue to digital networking is still in its early days**, offering a significant market opportunity ahead

# 2H25: moderate growth expected



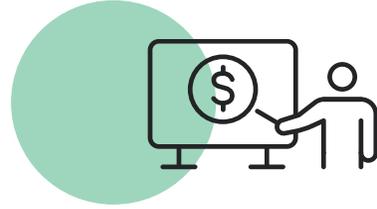
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Executing our strategy:  
New Product Launches in  
FY25

**Dante Director** launched commercially in 1H25 – the long-term cornerstone of our **Platform Software** business

**Dante AVIO Install Series** and **Dante Virtual Soundcard Pro** set to launch in 2H25, driving revenue growth and market expansion

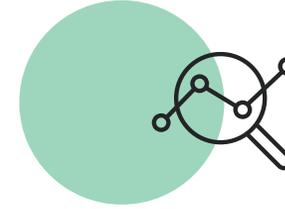


Strong Balance Sheet  
Enabling Growth

**A\$111.3 million in cash** at period end, providing financial strength and flexibility

Committed to **strategic capital deployment**—seeking opportunities to enhance long-term value

**Continued investment in our cost base** to support new product development and future growth acceleration



Full Year Outlook

**Gross profit in Q2 FY25** was ahead of **Q1 FY25** and we expect a **moderate strengthening** in the second half of the year

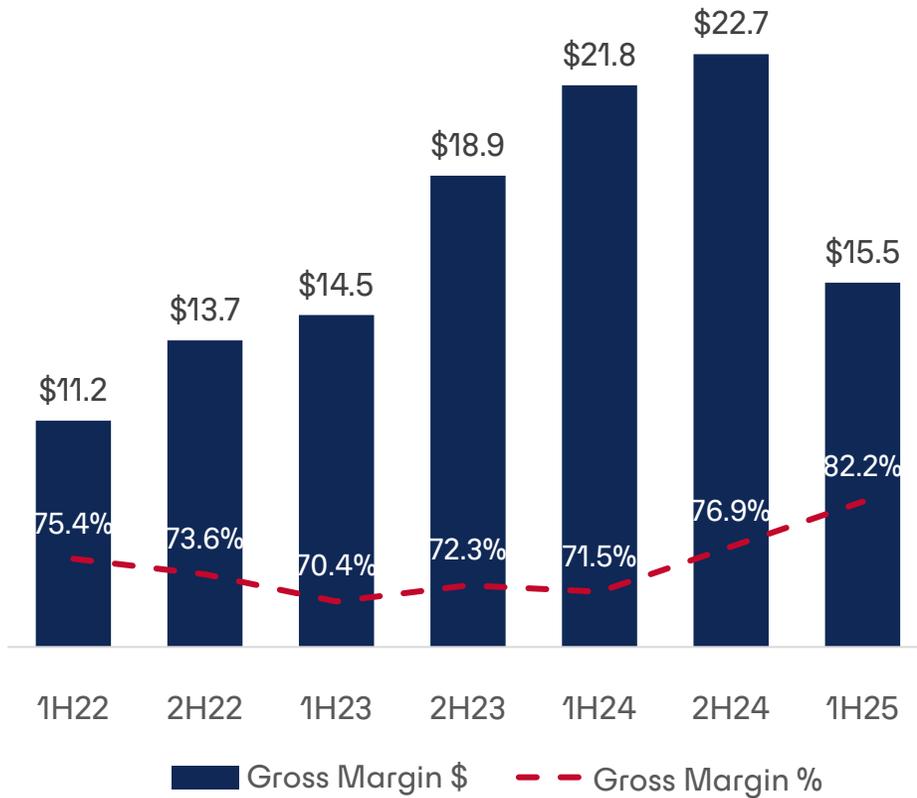
# 1H25 Highlights – Key financial metrics



1H25 results above market guidance, expect moderate growth in 2H25

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US\$m Gross Margin



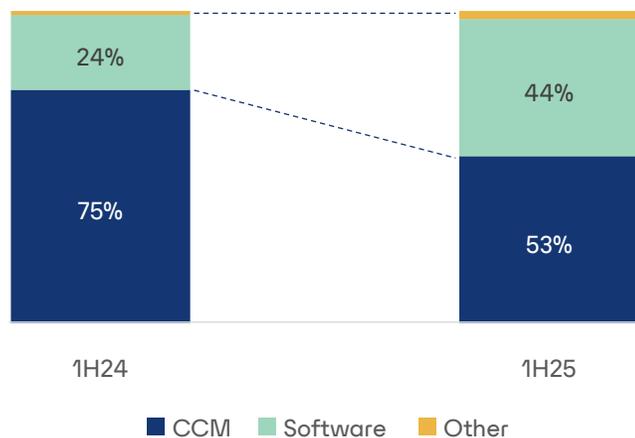
Other Key Financial Metrics	1H24	1H25	Variance vs 1H24
	US\$ M	US\$ M	
US\$ Revenue	30.4	18.9	(38%)
US\$ Gross Margin	21.8	15.5	(29%)
US\$ Gross Margin %	71.5%	82.2%	10.7pp
	A\$ M	A\$ M	
A\$ Revenue	46.6	28.7	(38%)
Gross Margin	33.5	23.7	(29%)
EBITDA	10.1	0.8	(92%)
Cash & Term Deposits	111.7	111.3	(\$0.4M)

# 1H25 Highlights – Shift in product mix



Transition from CCM to Software continues as expected

Revenue Mix by Product – 1H24 v 1H25



Other Key Financial Metrics	1H24	1H25	Variance vs 1H24
<b>US\$ Revenue by Product</b>	<b>US\$ M</b>	<b>US\$ M</b>	
CCM	22.7	10.1	(56%)
Software	7.3	8.3	13%
Other	0.4	0.5	12%
<b>US\$ Revenue</b>	<b>30.4</b>	<b>18.9</b>	<b>(38%)</b>

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# Strong Progress on FY25 Objectives



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1

Focus on sales & marketing activities to drive revenue

- Introduced the '**Dante Certified Partner**' program with top system integrator to deepen engagement, knowledge and specification of Dante products
- **Investment in marketing initiatives to better engage with Dante installed base** to drive knowledge and expansion of Dante products

2

Get customer video products to market with repeat orders

- Launched **Dante AV-H Multi Channel** which supports more sophisticated products with multiple video channels in both video endpoints and Dante Studio Windows software

3

Successfully deliver new Dante products to broaden revenue base

- **Dante AVIO Install adapters**, tailored to the Pro AV installation market featuring Euroblock analog audio connectors
- Ongoing enhancements to **Dante Connect** including remote contributor component allowing audio to be sent to a cloud-based Dante network from a browser

4

Dante Director: ongoing development of technology & infrastructure

- **Streamlined onboarding experience, multi-language support and remote monitoring of network performance**
- 2H25 building out Dante Director **core feature set** in areas such as **event notifications and signal monitoring**, while also building towards **enterprise ready features**

# Leading global Pro-AV technology supplier



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4,372  
Dante-enabled products

689  
Total OEM brands licensing Dante products

>290k  
Professionals trained on Dante

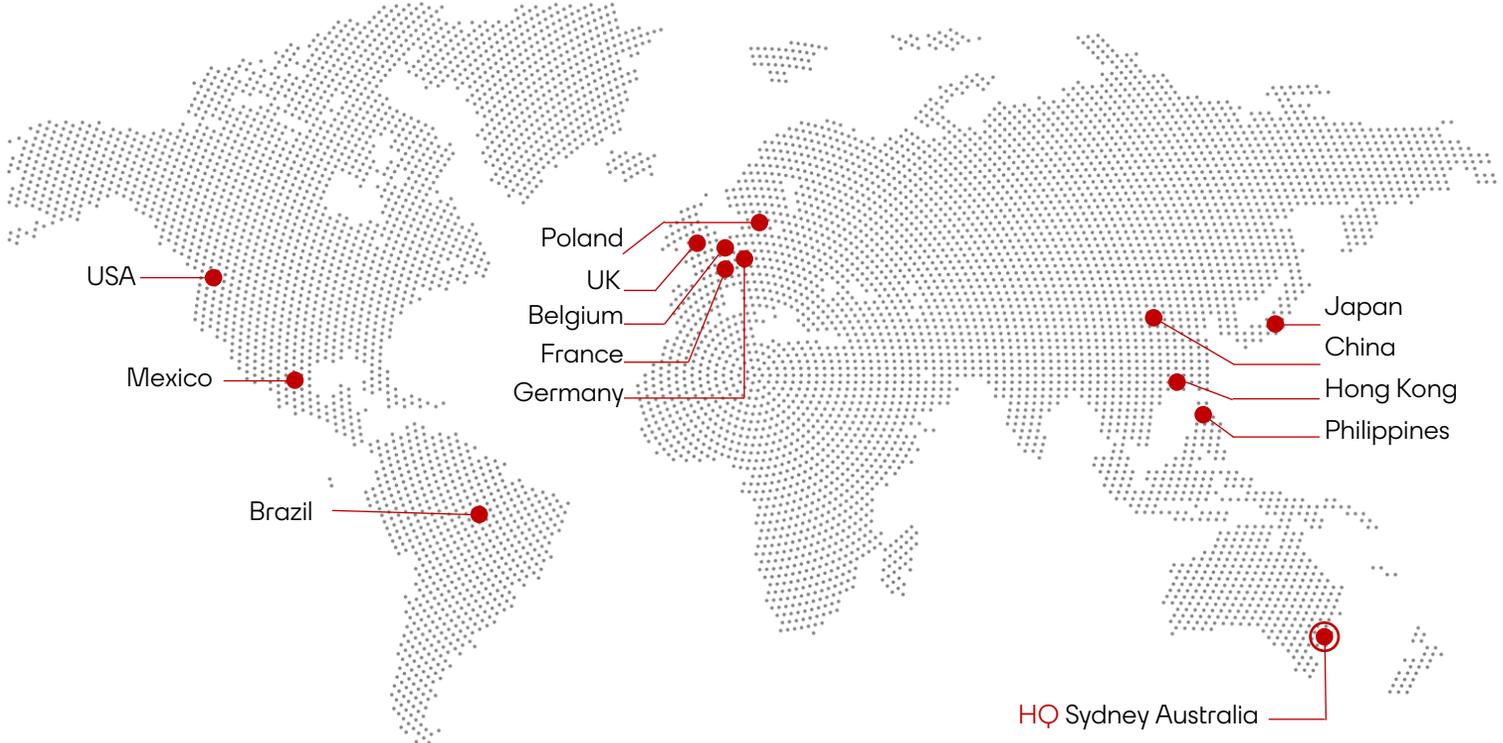
226  
Employees

8  
Languages supported

13  
Locations

Audinate is the company behind the Dante media networking solution used in the professional AV industry

### Audinate locations



# World-leading technology supplier to Pro-AV



Dante is in millions of devices and can be found in a diverse range of installations and applications across industries, including:

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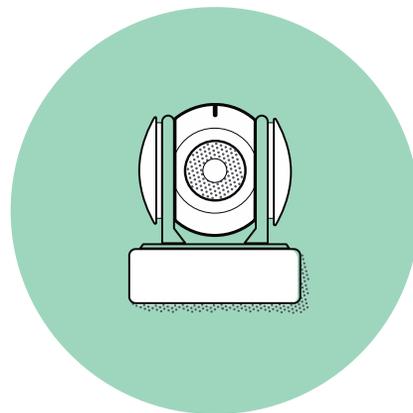
 Universities	 Conference Rooms	 Broadcast Studios	 Corporate Campuses	 Houses of Worship	 Arenas and Stadiums
 Recording Studios	 Conference Centres	 Transportation	 Amusement Parks	 Zoos	 Theatres

# Key Strategic Pillars



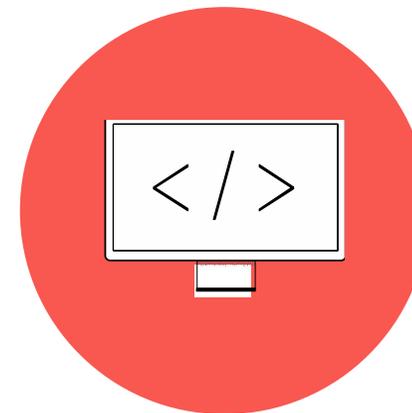
## STRENGTHEN AUDIO

- Expand into lower cost higher volume products
- Shift to software



## GROW VIDEO

- Continue to build out video platform capability
- Ongoing focus on design wins



## MANAGE AV INSTALLS

- Vision: interoperable control and management of Dante networks, from anywhere
- Dante Director is a major step towards this vision

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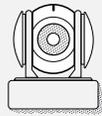
# Networked AV market opportunity is US\$2 billion

Audinate Updated TAM\* US\$2bn\*



## Audio

Revenue opportunity for addressable audio products including speakers, microphones, amplifiers, mixing consoles and signal processors



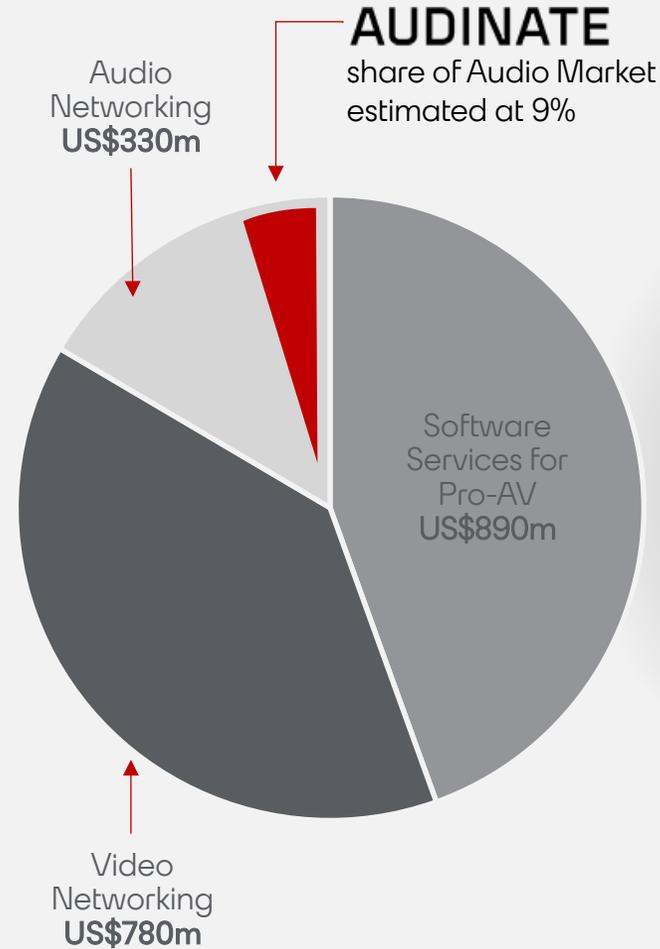
## Video

Revenue opportunity for cameras, displays, projectors, signal routing and switching products



## Software

Revenue opportunity for management control software (Dante Domain Manager) and Dante PC/Mac software for AV professionals



Additional revenue opportunity to fulfill Dante software vision is incremental to the TAM and not depicted in the TAM pie chart

Updated TAM calculation published October 2023

\* Based on Omdia research and management estimates

# Audinate's lead continues to grow



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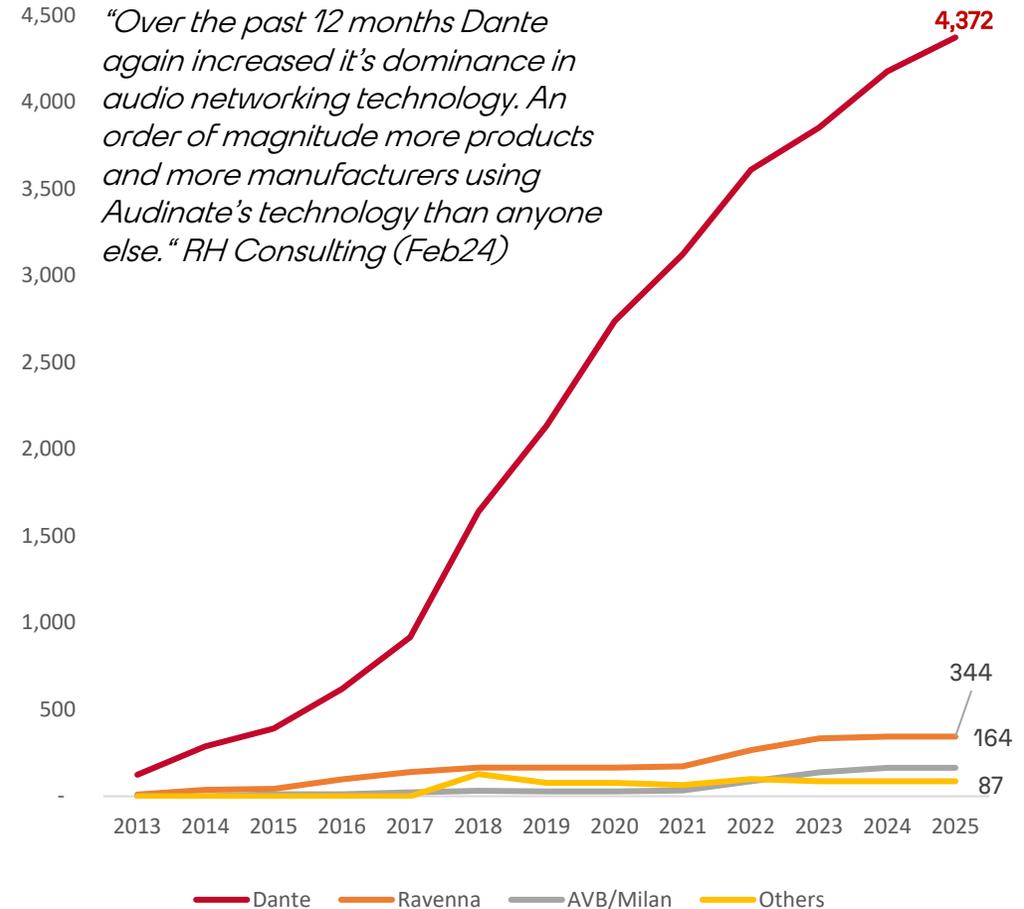
**>290,000**  
Professionals  
trained on Dante

**476**  
OEM brands  
shipping Dante  
enabled products

**4,372**  
Dante enabled  
products available  
on the market

**12x**  
Market adoption of  
closest  
competitor

## Total audio products per protocol



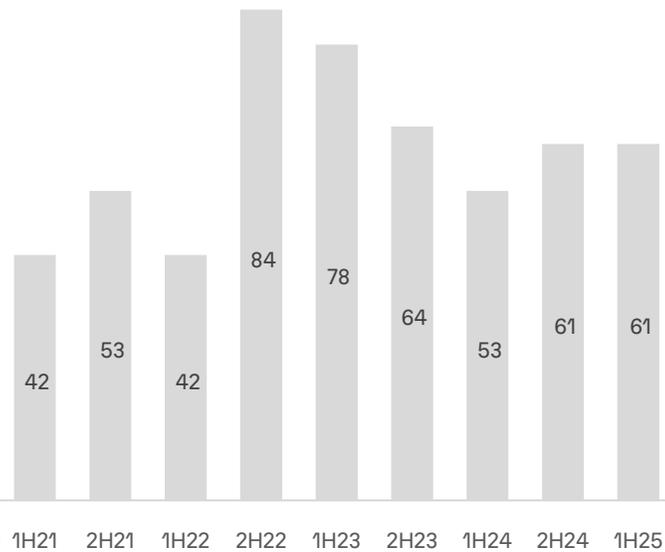
1) RH Consulting, Networked Audio Products 2024 and Audinate company data

# OEM Design Wins through Product Launch



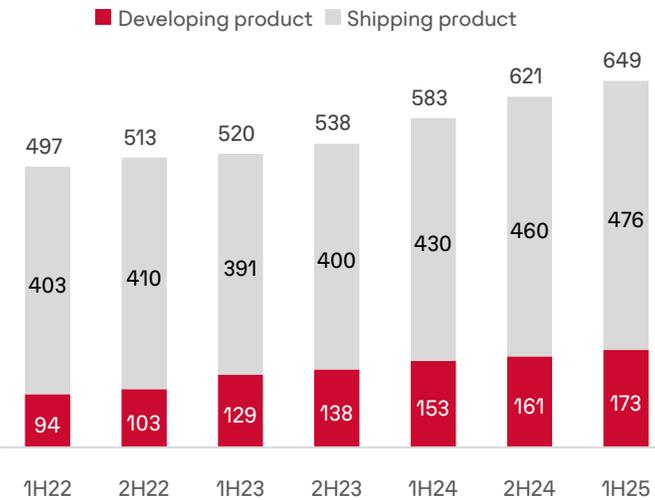
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## Design Wins



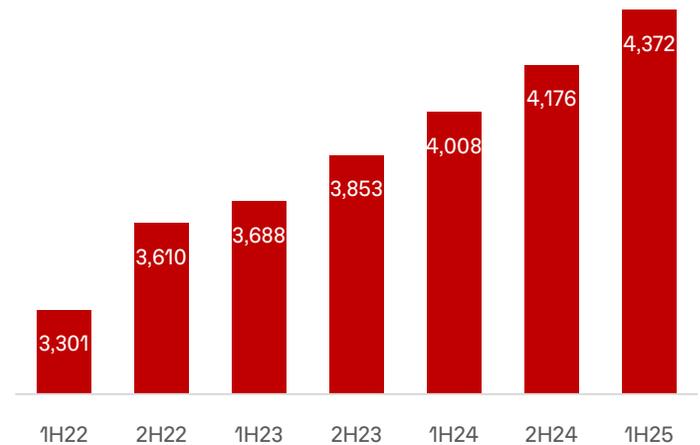
- Moved from an up-front fee to an annual subscription pricing model in mid FY21
- FY22 design wins favourably impacted by chip shortages as customers signed up to DEP and Brooklyn 3 to address constraints

## OEM Brands shipping & developing Dante-enabled Products



- 476 OEM brands have announced products in the market
- 173 OEM brands currently developing new Dante-enabled products
- In total 689 OEM brands have licensed Dante (includes OEMs shipping & and developing products, ODMs, parent brands and sundry other)

## Dante-enabled Products Ecosystem



- Product ecosystem includes 4,372 Dante-enabled products and growing, with 689 OEM licensees in total
- 12x number of products than the next digital audio networking technology

# Dante Director Update



Indicative Roadmap as shared at Integrated Systems Europe (ISE) Tradeshow - February 2025

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## TODAY

‘Standard’ tier for small-mid installations 20-100+ devices

- Remote management
- Multiple sites
- Access control & event log
- Simple clocking
- API for status monitoring and control
- Cross-subnet routing
- Telemetry - new at ISE!

## CURRENTLY IN DEVELOPMENT

‘Standard’ tier feature enhancements

- Notifications and event filtering
- Security enhancements including MFA
- Media encryption management

## 12-18 MONTHS

‘Enterprise’ tier as DDM alternative

- Enterprise SSO
- Enterprise grade support
- Security certification
- True high availability
- Hierarchical domains and shared media

# Ongoing traction in Video

In 1H25 we have...

- ✓ **60 Dante AV partners / OEMs licenced for video** up from 50 at 1H24
- ✓ **116 Dante video products** launched by customers at the end of 1H25, up from 66 products at 1H24
- ✓ **Launched Dante AV-H Multi Channel** which supports more sophisticated products with multiple video channels in both video endpoints and Dante Studio Windows software

Three versions optimising video quality, network bandwidth and cost for different market segments:

	Dante AV Ultra	Dante AV-A	Dante AV-H
Solution Overview	Highest Performance, lowest latency AV solution for SDI/HDMI replacement	Low latency AV distribution solution for hospitality, corporate and other verticals	Cost effective AV solution for meeting rooms, classrooms and small-scale video production
Example Products	HDMI encoders/decoders SDI encoders/decoders Cameras SDM cards (future)	HDMI encoders/decoders	HDMI Encoders/Decoders Cameras SDM cards (future)
Product Delivery	IP Core or FPGA Image (ZYNQ 30 FPGA)	Software to run on ASPEED AST1530	Software for existing H.264/H.265 SoC
Quality	Visually Lossless	Visually Lossless	Can be Visually Lossy
Latency	Sub frame	Sub frame	A few frames



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# Audinate 1H25 Financial Performance

Chris Rollinson, CFO

# Income Statement



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(A\$'000)	1H24	1H25	Change (%)
Revenue	46,604	28,722	(38%)
<b>Gross profit</b>	<b>33,481</b>	<b>23,685</b>	<b>(29%)</b>
Gross Margin %	71.8%	82.5%	
Employee expenses	(17,548)	(16,611)	(5%)
Sales & marketing expenses	(2,411)	(2,587)	7%
Other operating expenses	(3,628)	(3,645)	-
<b>Operating expenses</b>	<b>(23,588)</b>	<b>(22,843)</b>	<b>(3%)</b>
<b>EBITDA</b>	<b>9,894</b>	<b>842</b>	<b>(91%)</b>
Depreciation & amortisation	(5,899)	(7,415)	26%
<b>EBIT</b>	<b>3,995</b>	<b>(6,573)</b>	<b>(265%)</b>
Net Interest income	1,594	2,297	44%
<b>(Loss) / profit before tax</b>	<b>5,589</b>	<b>(4,276)</b>	<b>(176%)</b>
Income tax	(844)	2,069	345%
<b>(Loss) / profit after tax</b>	<b>4,745</b>	<b>(2,207)</b>	<b>(146%)</b>

US\$ revenue decreased 38.0% to U\$18.9 millions with A\$ revenue decreasing 38.4% to A\$28.7 millions

Lower employee expenses from a reduction in employee incentives expenses offset by an uplift in headcount from 204 (1H24) to 226 (1H25)

Sales & Marketing increased due to spend on advertising and content creation

Other operating expenses reflect increased software subscriptions, travel and professional costs

Depreciation and amortisation expenses were higher than 1H24 due to the increased capitalised development costs during 2H24

Other Income relates to A\$2.4 million interest income post A\$70 million capital raise (1H24)

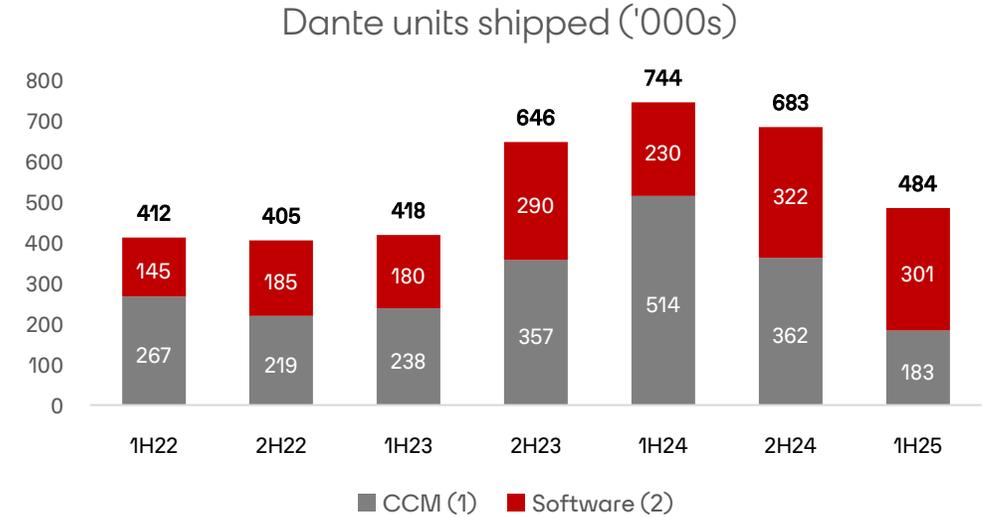
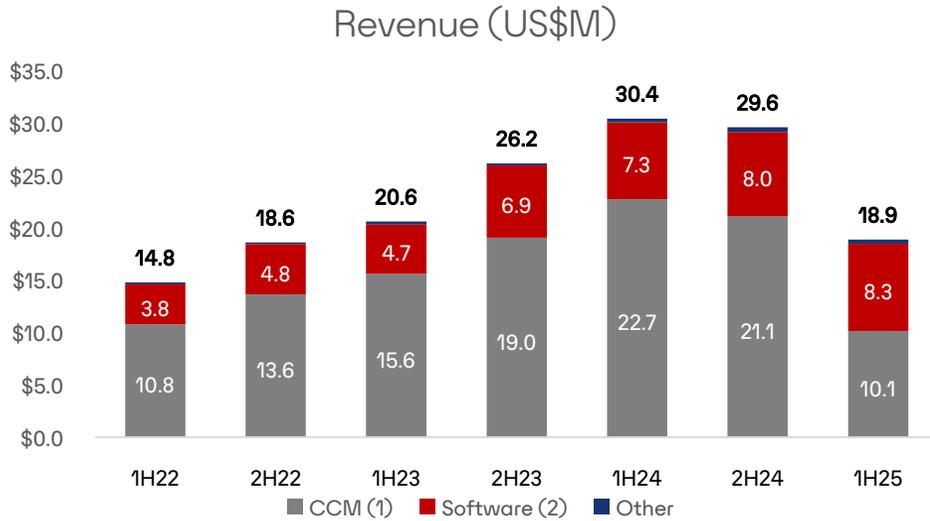
## EBITDA CHANGES

\* The EBITDA measure previously excluded foreign currency gains / (losses), however from the current financial year, these have been included in the EBITDA measure as the impacts are directly linked to Audinate's core operations and are therefore considered relevant to its operating performance. Historical EBITDA has been updated to reflect the change.

# Chips, cards & modules decline whilst Software revenue grows



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1H25 compared to 1H24:

- Revenue is down 38%
- CCM revenue is down 55%
- Software revenue up 13%
- GP margin has increased from to 82.5% reflecting the transition to higher margin software products.

1H25 compared to 1H24:

- Overall units shipped reduced by 35%
- CCM units down 64.4%
- software units up 30.8%

(1) CCM includes Brooklyn 3, Ultimo, Broadway, Dante AV Ultra, Viper & AVIO Network Adaptors

(2) Software includes Dante Domain Manager (DDM), Dante Cloud, AV software tools (Dante Studio, Dante Virtual Soundcard, Via), Dante Embedded Platform (DEP), Dante Application Library, Dante Ready, IP Core and Dante AV-H, Reference gnwings

# Cash-flow Statement



(A\$'000)	1H24	1H25
Receipts from Customers *	46,631	33,911
Payments to suppliers and employees *	(35,482)	(34,787)
Interest received	1,040	2,383
Interest paid	(69)	(110)
Income Tax Paid	(352)	(219)
<b>Operating activities</b>	<b>11,768</b>	<b>1,178</b>
Payments for property, plant and equipment *	(395)	(1,009)
Payment for intangible assets *	(6,827)	(5,731)
Investment in Term Deposits	(33,500)	28,568
<b>Investing activities</b>	<b>(40,722)</b>	<b>21,828</b>
Proceeds from the issue of shares	70,000	-
Share issue transaction costs	(2,117)	-
Principal elements of lease payments *	(490)	(525)
<b>Financing activities</b>	<b>67,393</b>	<b>(525)</b>
<b>Net increase / (decrease) in cash</b>	<b>38,349</b>	<b>22,481</b>
<b>Free Cash Flow (sum of *)</b>	<b>3,437</b>	<b>(8,141)</b>

Payments to suppliers and employees includes bonus payments of \$4.3 million relating to the prior year performance (1H24: \$3.3 million)

## 1H25 Operating Cashflow to EBITDA Bridge

EBITDA	\$0.8m
Reverse non-cash Share-based payments	(\$0.2m)
Interest received	\$2.4m
Investment in working capital/other	(\$1.8m)
<b>Cash from operating activities</b>	<b>\$1.2m</b>

Payments for intangible assets primarily represent internal employment & overhead expenses capitalised to development costs

Cash in term deposits with greater than 3 months maturity moved to short term cash deposit accounts

\$70 million capital raise in 1H24

Share issue transaction costs for the capital raise in 1H24

Negative free cash flow of (\$8.1 million) in 1H25 compared to a positive free cash flow of \$3.4 million in 1HFY24.

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# Balance Sheet



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(A\$'000s)	30-Jun-24	31-Dec-24	Change (\$)
Cash	47,842	70,652	22,810
Term deposits	69,195	40,627	(28,568)
Trade and other receivables	10,690	6,896	(3,794)
Inventories	5,233	4,809	(424)
Income tax receivable	45	17	(28)
Property, plant and equipment	2,088	2,246	158
Right-of-use assets	3,144	2,680	(464)
Intangibles	37,874	37,729	(145)
Deferred tax asset	10,537	12,248	1,711
Other current & non-current assets	2,826	3,568	742
<b>Total assets</b>	<b>189,474</b>	<b>181,472</b>	<b>(8,002)</b>
Trade and other payables	3,884	2,283	(1,607)
Contract liabilities	3,127	4,283	1,156
Income tax payable	72	115	43
Employee benefits & other provisions	8,383	3,635	(4,748)
Lease liabilities	3,447	3,045	(402)
Other liabilities	75	51	(24)
<b>Total liabilities</b>	<b>18,988</b>	<b>13,412</b>	<b>(5,576)</b>
<b>Net assets</b>	<b>170,486</b>	<b>168,060</b>	<b>(2,426)</b>
Contributed capital	199,764	202,005	2,241
Reserves	4,653	2,193	(2,460)
Accumulated losses	(33,931)	(36,138)	(2,207)
<b>Total equity</b>	<b>170,486</b>	<b>168,060</b>	<b>(2,426)</b>

\$111.3 million in Cash & Term Deposits

Intangibles primarily represent development costs capitalised (\$27.4 million) & goodwill (\$9.4 million)

Deferred tax asset includes \$12.3 million for Australian tax losses

Decrease attributable to lower employee bonus provision for six months (1H25) compared to twelve-month provision at 30 June 2024

Movement in Reserves relates to reduction in LTI plan reserve for employee shares vested and transferred to contributed capital

Accumulated losses includes accounting for fair value of preference shares at IPO of \$18.5 million and 1H25 net loss of (\$2.2 million)

# Outlook

Aidan Williams, CEO

# Continuing focus on growth

FY25 Priorities



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1

Focus on sales & marketing activities to drive revenue

2

Get customer video products to market with repeat orders

3

Successfully deliver new Dante products to broaden revenue base

4

Dante Director: ongoing development of technology & infrastructure

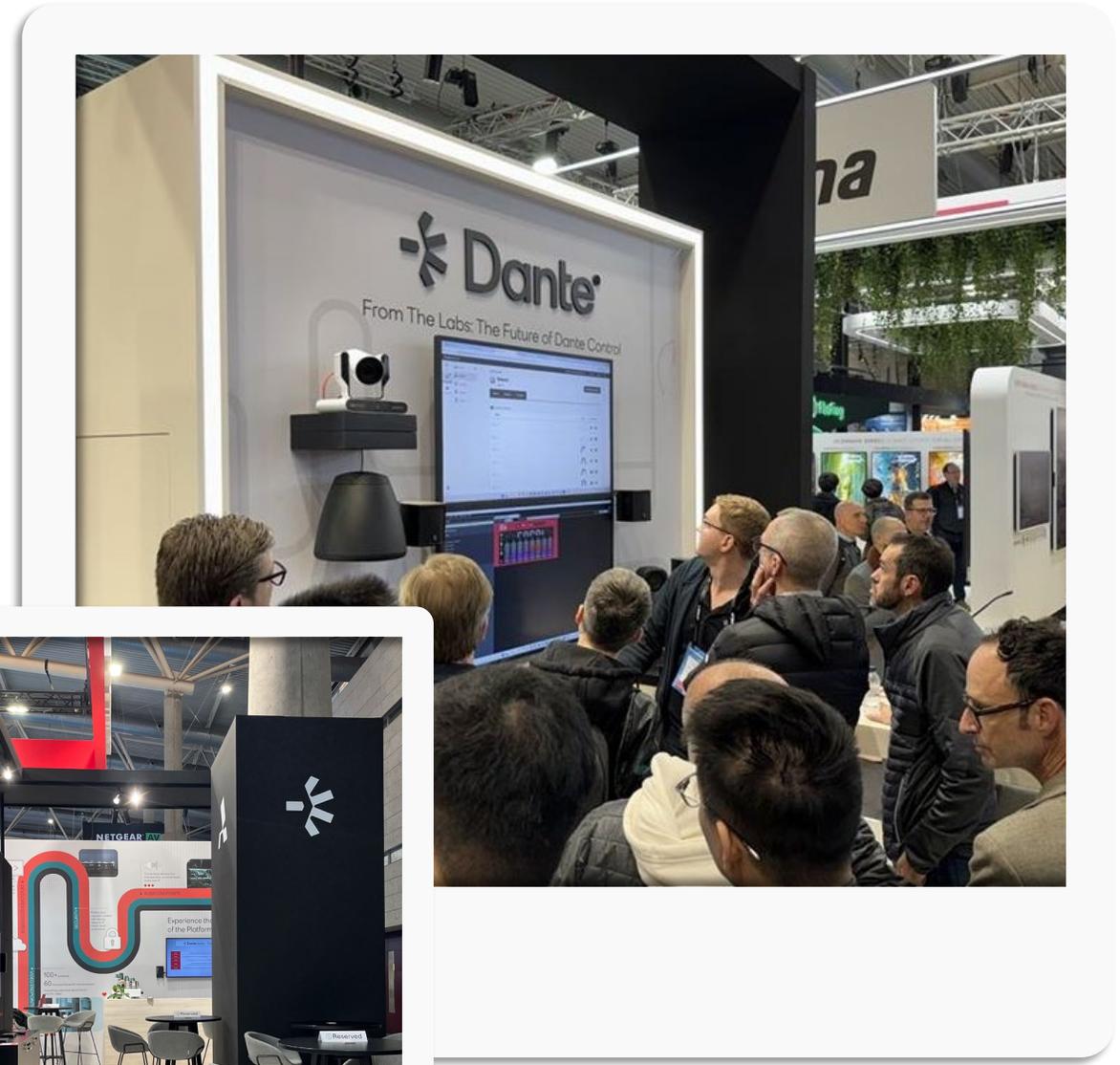
# FY 25 Outlook



## Long-term strategic thesis for Audinate remains strong

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- Q2 FY25 gross profit exceeded Q1 FY25, with a moderate strengthening expected in the second half.
- FY25 remains a transitional year as customers work through inventory backlogs
- Audinate expects a return to normal order patterns and growth by FY26
- New Product Launches - new AVIO adaptors and a premium Dante Virtual Soundcard is expected to positively impact earnings starting in 2H FY25
- Strong Demand Indicators - key metrics from manufacturers, AV system designers, and installers point to continued strong demand for Dante technology:
  - Growth in OEM design wins reflects a strong pipeline of new Dante products and indicate future revenue growth
  - Dante Certification and Training programs attract over 4,000 attendees per month, boosting global adoption of Dante
- Expanding Dante Device Base - 6 million+ devices in use and more than 1 million added annually
- Dante's growing installed base and the launch of Dante Director support long-term revenue opportunities from managing and monitoring AV installations



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# AUDINATE

PIONEERING THE FUTURE OF AV

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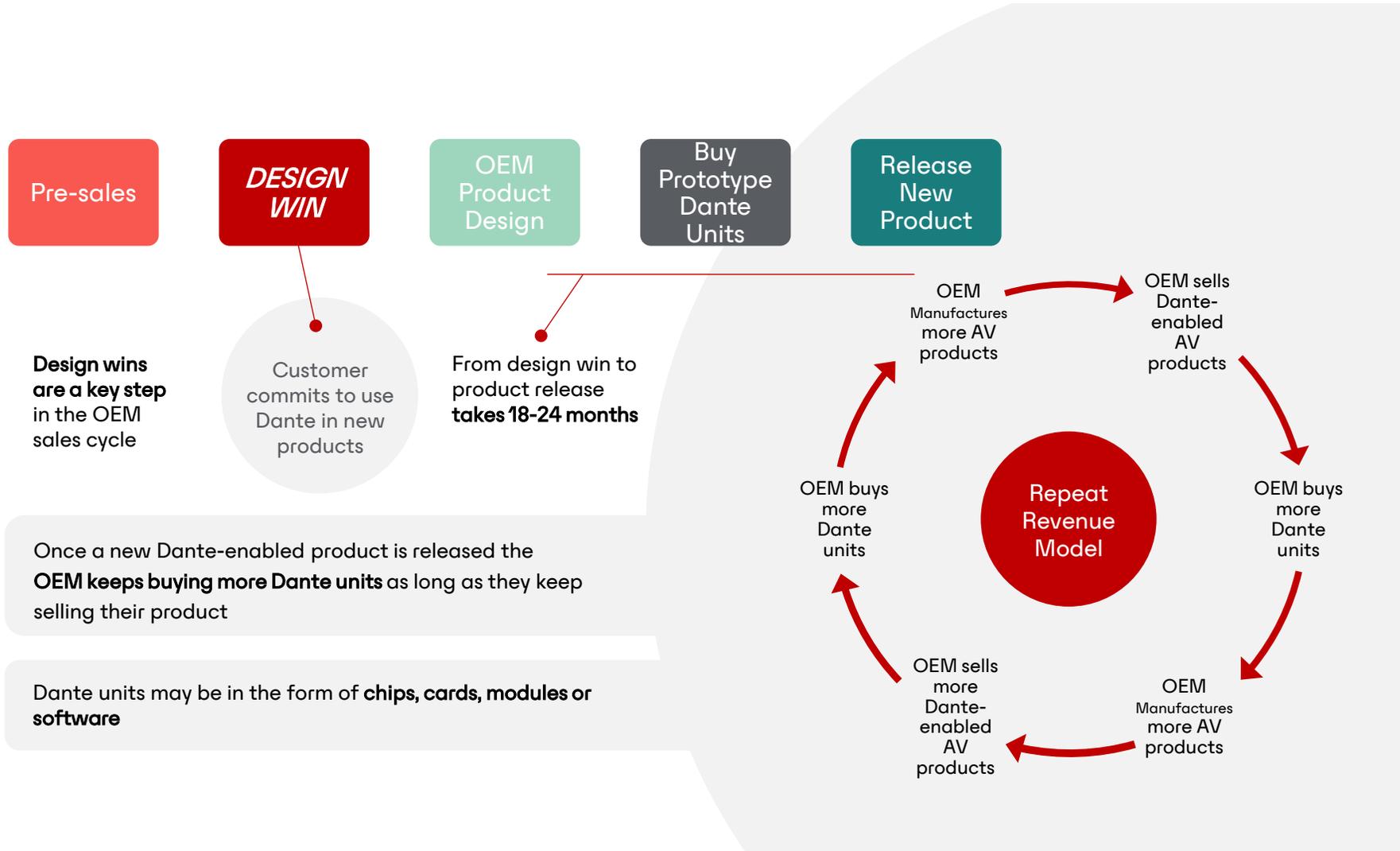
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# OEM Design Wins Drive Future Revenue Growth



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# Dante Product Map



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Audio Visual Integrators, Professionals & Consumers

## System Software

(For system setup, management and troubleshooting)

Dante Controller

Dante Domain Manager

Dante Director

## AVIO Network Adaptors

- Analogue
- USB / Bluetooth

## PC/Mac/Cloud Software

- Dante Studio (AV)
- Dante Virtual Soundcard
- Dante Via
- Dante Connect

Manufacturers (OEMs)

Original Equipment Manufacturers

## Embedded Audio

### Chips, Cards & Modules

- Brooklyn
- Broadway
- Ultimo / Dante Pro S1

### Software

- Dante Embedded Platform
- Dante IP Core
- Dante Ready

## Embedded Video

### Chips, Cards & Modules

- Dante AV Ultra
- Viper Board

### Software

- Dante AV Ultra 2
- AV-H
- Dante AV-A

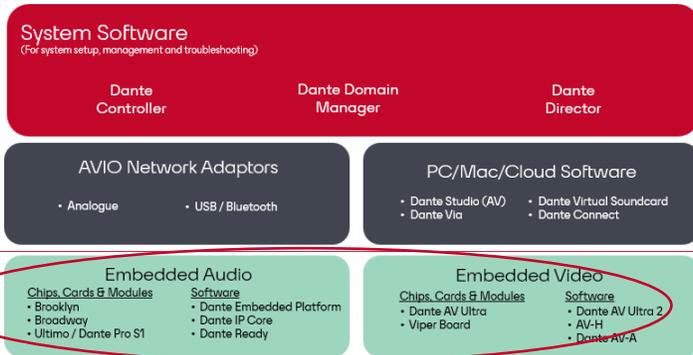
# OEM Business Model



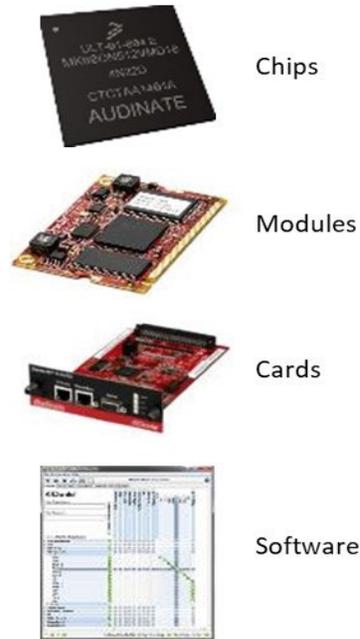
Audinate's Original Equipment Manufacturer (OEMs) customers purchase Dante chips, cards & modules and software to build inside their ProAV products

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## Dante Product Map



## Audinate products



## OEM example customers



## OEM products



# Dante Controller for AV Professionals



## Dante Controller

### Free system setup tool

- Downloadable from Audinate homepage
- Registration required
- Define virtual wires across the network
- > 270,000 downloads

### Manages audio and video signals

#### Simple & easy to use

- Standard industry matrix view
- Training provided via Dante Certification

### Devices appear automatically

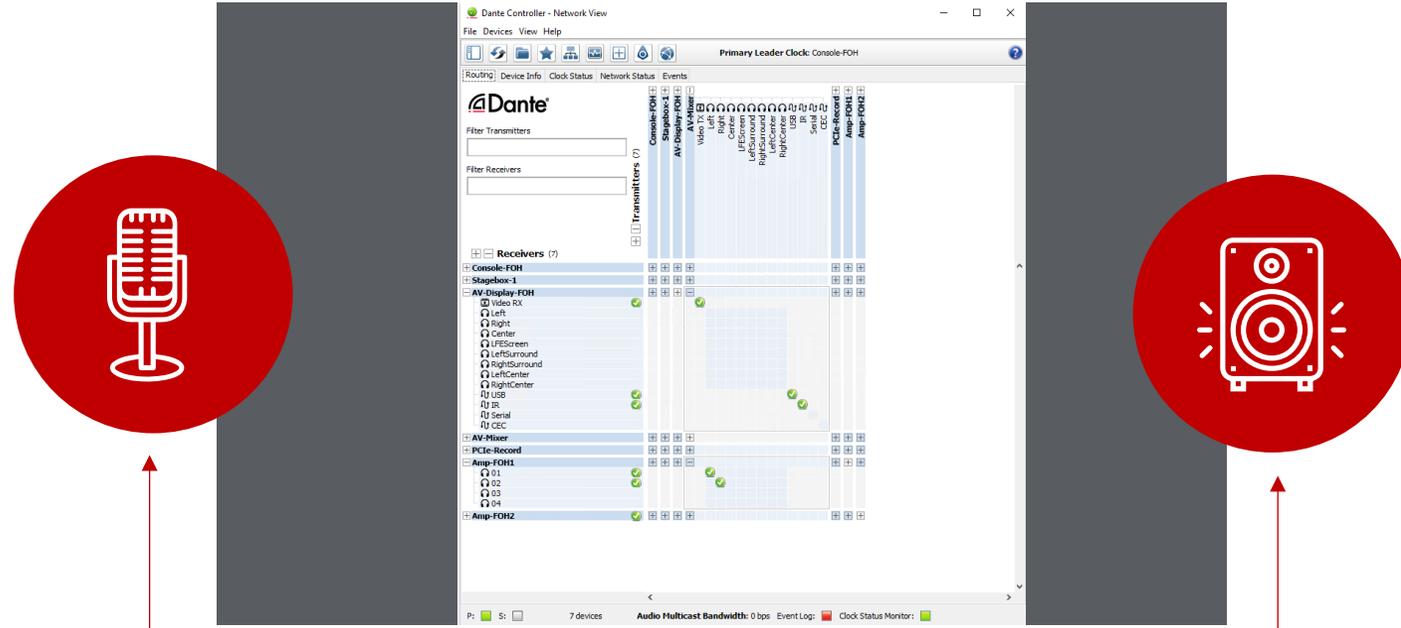
- Intuitive device names
- No magic numbers, MAC or IP addresses

### Devices remember configuration

- No need for Dante Controller to remain connected to the network

### Provide performance logs

- Details of each device on the network for trouble-shooting



More background available (hyperlinks):

Dante Controller is the free configuration tool integrators use to create the “virtual wiring” between **transmitting devices** (e.g. microphones) and **receiving devices** (e.g. speakers)

For personal use only

# Dante Audio & Adaptors



For personal use only

## Dante Audio Chips & Modules

- Hardware based implementations for a range of product counts and price points
- Transports uncompressed audio signals across standard computer networks

## Dante Adaptors

- Connects legacy equipment to Dante (mostly analogue)
- Adds Dante to existing audio products (analogue, USB and AES3)
- Pulls through other Dante products and software
- Established a global distribution channel of online retailers and country distributors
  - 80 resellers and growing
  - Strong initial demand with sales performance and repeat orders
- Adapter modules sold direct to OEMS

### Brooklyn



32 & 64 audio channel counts

Used in Mixing Consoles & Signal Processors

Repeat revenue model

### Broadway



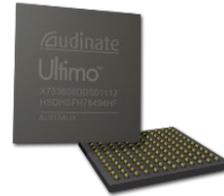
8 & 16 audio channel counts

Used in networked Amplifiers and Ceiling Microphones

Product now End of Life

Repeat revenue model

### Ultimo



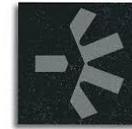
2 & 4 audio channel counts

Used in networked Speakers and Microphones

Feb 2024: Dante Pro-S1 announced as the successor to Ultimo

Repeat revenue model

### Dante Pro S1



2 & 4 audio channel counts

Used in networked Speakers and Microphones

Provides a platform for new security features such as media encryption

Repeat revenue model

### Adaptors



# Dante Audio Software



For personal use only

## Dante audio device software

- Software based implementations for a range of product counts and price points
- OEM customers, based on per unit royalty model
- Transports uncompressed audio signals across standard computer networks
- Provides perfect inter-operability with Dante chips, cards & modules and other software products
- Used in a wide variety of audio products, including speakers, microphones, amplifiers, digital signal processors and mixing consoles
- Configured using Dante Controller and can be managed via Dante Domain Manager

More background available (hyperlinks):

[Dante IP Core](#)

[Dante Embedded Platform](#)

[Dante Application Library](#)

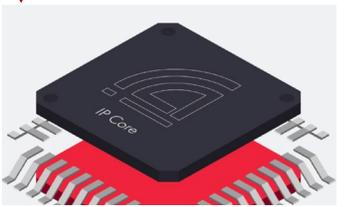
## Reference Design



- Legacy product
- Up to 512 audio channels
- Small number of high-volume customers

Repeat revenue model

## IP Core



- Next generation high performance product
- Up to 512 audio channels
- For FPGA-based OEM products
- BOM savings for OEM by sharing chip

Repeat revenue model

## Embedded Platform



- Up to 128 audio channels
- For Linux-based OEM products
- Supports Intel/x86 & ARM processors
- BOM savings for OEM by sharing chip

Repeat revenue model

## Application Library



- For OEMs & Software Developers
- Simple way for software developers to add Dante to their products
- "Dante Ready" available

Device Software



# Dante Video Products

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## Dante AV Chips & Modules

- Dante AV Ultra and Viper are premium products targeting live venues, broadcasters, corporate board rooms and university lecture spaces.

## Dante Software

- Dante AV-H enables existing mainstream products targeting corporate meeting rooms, lobbies, education classrooms, hospitality etc.
- Provides a lower cost Dante AV endpoint for price sensitive applications
- Dante Studio enables both PC to/from devices and PC to PC use cases (Mac compatibility will follow in future releases)
- Enables future cloud Dante AV offerings

### Dante AV Ultra



#### Premium Dante AV offering:

- high resolution
- visually lossless quality
- audio/video synchronization
- subframe latency

Repeat revenue model

### Viper

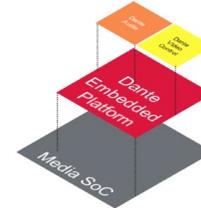


#### Fully integrated AV over IP board:

- Provides a foundation for ODM designs
- From Silex acquisition
- Foundation of Dante AV Ultra v2
- Product now End of Life

Repeat revenue model

### Dante AV-H



#### Simple Dante AV offering:

- Enables Dante audio and video routing & configuration
- Targets existing ODM hardware designs
- H264 is the dominant codec used in PTZ IP cameras

Repeat revenue model

### Dante AV-A



#### Dante AV-A:

- Uses the ASPEED codec
- Low video latency perfect for distributed video applications eg higher education, venues, workplaces

Repeat revenue model

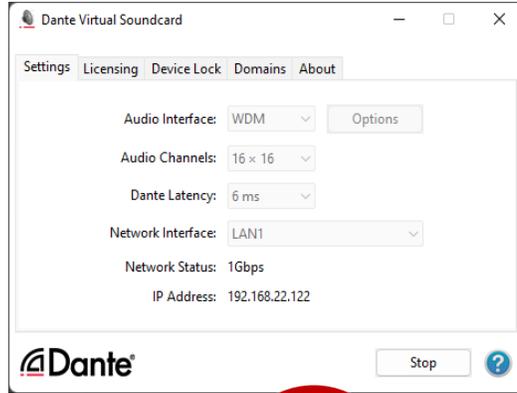
# Dante Via & DVS for AV Professionals



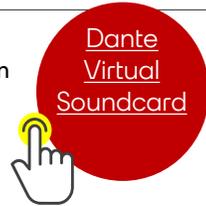
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## Dante Virtual Soundcard (DVS)

- Turns a computer into a Dante-powered workstation, integrating a Mac or PC with Dante-enabled audio equipment on a network
- Connects to record, process and playout using any audio application and any combination of Dante-enabled devices
- Up to 64 audio channels



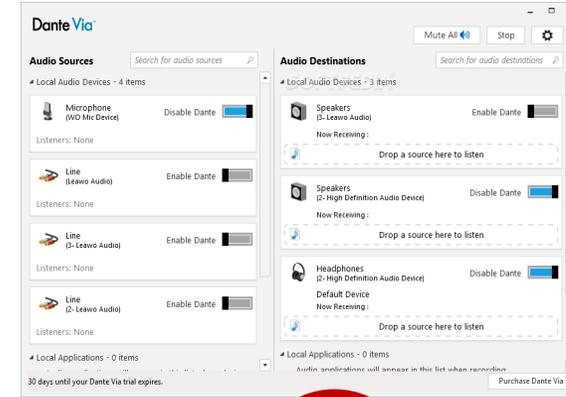
More information available here (hyperlinks):



**Dante Virtual Soundcard** is a robust, high channel count application with the single purpose of getting large numbers of audio channels in and out of computers while **Dante Via** allows for a more diverse set of devices and applications, but at a lower channel count.

## Dante Via

- Routes audio from devices and applications to one another – up to 16 audio channels
- Connects devices and applications to an existing Dante network
- Enables the connection of USB and FireWire devices to Dante networks



More information available here (hyperlinks):



Permanent License  
**\$59.99 USD**  
(Activates one computer, transferable)

Combo Pack  
**\$69.99 USD**  
Save \$39.99 on Dante Via and Dante Virtual Soundcard when bought together

## Get Dante Via

**Buy a Dante Via License**

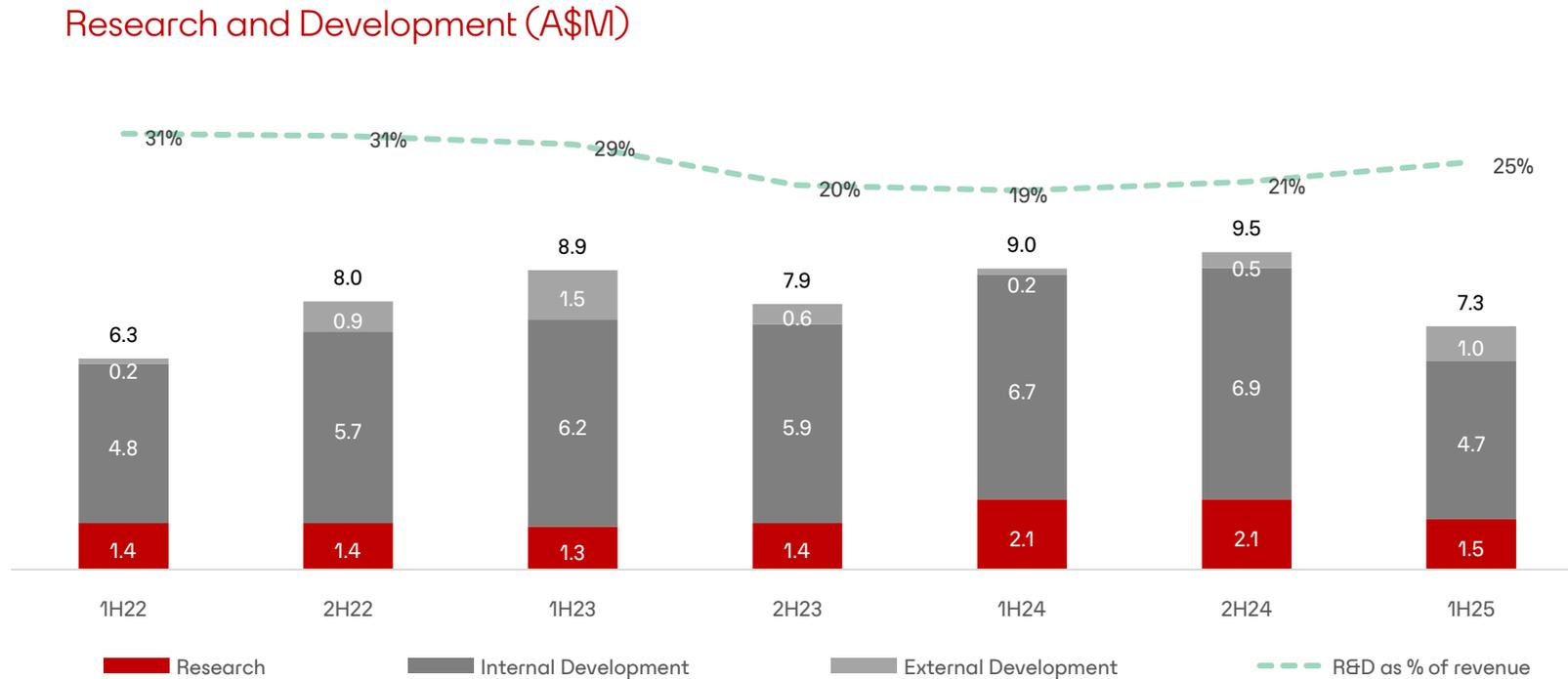


Local currency, tax and payment methods apply where applicable. Prices may fluctuate due to exchange rates.



# Ongoing focus on innovation and R&D to maximise future growth opportunities

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Capitalised development costs are generally amortised over three years. Ongoing refinement is resulting in fewer activities being capitalised over time