OMNI BRIDGEWAY

ASX Announcement
26 OCTOBER 2023

Addresses of Chairman and Managing Director to Shareholders of Omni Bridgeway Limited at 2023 Annual General Meeting

In accordance with Listing Rule 3.13.3, please refer to the following attached addresses to be given at today's Annual General Meeting (**AGM**) of Omni Bridgeway Limited by:

- **PART ONE: Michael Kay, Chairman**
- **PART TWO: Andrew Saker, Managing Director and CEO**
- **PART THREE: Raymond van Hulst, incoming Managing Director and CEO**

This announcement is authorised for release to the market by the Disclosure Committee.

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Chairman’s Address

Michael Kay
Non-Executive Chairman

26 October 2023

Address by Chairman, **Michael Kay**, to the AGM

I want to begin by acknowledging a matter of concern to all Omni Bridgeway shareholders and stakeholders.

As is indicated by some of the voting on the adoption of the remuneration report, the recent performance of our share price has been extremely disappointing. We believe that it does not in any way reflect the intrinsic value of our platform and the current book of our business. I note that the analysts who cover our stock agree. The current consensus price target is $3.56, more than double the current share price. This is incredibly frustrating and clearly an unacceptable situation for shareholders and the company.

We have canvassed shareholder views as to the share price notwithstanding the general share market weakness, particularly in the small cap sector. Whilst there is no unanimity of view, there are certainly some core themes.

First, the retirement of Andrew Saker as Managing Director and Chief Executive Officer surprised and disappointed some shareholders. I would point out, that Andrew has given nine years of diligent service to the company – a significant tenure for a CEO- including moving away from his broader family to New York for two and a half years. But notwithstanding the disappointment at Andrew's decision, all shareholders that I have had the opportunity to speak to have strongly endorsed Raymond van Hulst as Andrew's replacement, I will say more on this later.

The second issue has been our inability to accurately predict completions and consequent cashflows, which, together with COVID-19, has delayed expected returns to shareholders. This has led to a perception by some that we may need to raise equity and/or that returns to shareholders will continue to be delayed.

The third issue, which is related to the second, is the gap between cost coverage in the funds and the current cost base of our operations and other commitments.

In responding to the second and third issues, it is our view that there is an inherent trade-off between the investment necessary to source high quality legal assets and the lengthy cycle time to maturity. There is a resulting mismatch between expenditure on the origination platform and the eventual cashflows from the investments. The waterfall structure of the early funds and COVID-19 exacerbated this mismatch. In a business such as ours, with long cycle times, that mismatch is not only material but also is further exacerbated by growth.

That said we believe the investment in the platform is the very thing that has generated the extraordinary growth we've achieved and has created significant embedded value and future cashflows.

Our confidence derives from the fact that the merged businesses have cumulatively, successfully negotiated over 60 years of investing in legal assets. This is an unrivalled record. Some shareholders have grown concerned at our inability to generate sufficient management fees to cover our cost base, particularly in view of the volatility of earnings that is a natural consequence of the uncertainties in the legal system.

To mitigate this duration risk, we have three levers at our disposal. The first is disciplined management of costs; the second is the drive to improve our cost coverage entitlements as the older funds roll off and greater competition emerges for participation in our funds; the third lever is the management of our liquidity and duration through prudent asset sales into the secondary market.

With these levers we believe we can manage, with a margin of safety, the trade-off between the strategic imperative of growing to cement our place at the head of the global industry while also generating and accelerating sustainable shareholder returns.

Incoming Managing Director and Chief Executive Officer Raymond van Hulst will provide more details in his address, outlining the initiatives we are putting in place to ensure the value that has been created is better reflected in the share price.

Moving now to my review of the financial year to 30 June 2023.

Notwithstanding the share price, FY23 was a year of significant growth for Omni Bridgeway, marked by the successful execution of key initiatives that have solidified our position as the industry's leading manager of legal assets.

We achieved each of the key goals we set for ourselves:

- We expanded into new locations and key jurisdictions within the United States and Europe.
- Advanced modelling capabilities, and specialised functions and sophisticated probability analytics have been deployed to improve the sophistication of risk assessment and pricing. This includes a focus on not just downside risk but also undervaluing the upside.
- An integration across all back-office operations and regional hubs has been successfully completed.
- Our Board and management have been strengthened.

Andrew will take you through the operational and corporate achievements in more detail.

We are exploring the use of fair value reporting to enhance peer comparisons and better demonstrate the embedded value in our assets. Additionally, we are considering launching two new funds, one of which may focus on investments with a positive ESG profile.

The current macro environment has been de-stabilised by geopolitical disruption, wars in Europe and the Middle East, stressed financial markets, and high inflation.

Omni Bridgeway, as an alternative asset manager and investor in litigation and enforcement assets, offers investors a model that is typically uncorrelated with economic cycles and macro events and we are well-positioned to navigate these challenges. Demand for our capital increases as other capital sources become more restricted. The number of insolvencies and general commercial disputes are likely to increase.

Omni Bridgeway has a pricing model that provides a natural hedge against inflation. Typically, investment costs are passed on to the client and reimbursed on successful completion of the investment. Further, returns are structured as a multiple of costs, that covers inflation, or as a percentage of the damages including interest that typically ameliorates the impact of inflation. We are also increasingly protected against duration risk as our contracted returns reflect the time value of money.

Importantly, the structure of the industry is now moving in our favour.

The emerging global market for legal finance continues to mature, and competition is contracting as capital becomes constricted and previous competitors go into run off. This augurs well for pricing and margin opportunities.

Our diversified model will continue to be a critical comparative advantage; we have consistently grown, innovated and strengthened our platform and business offering in contrast to others in the asset class.

In terms of capital management, the Board will continue to make risk-adjusted capital allocation decisions. As such, the Board decided not to pay a dividend for the FY23 year.

We initiated a share buy-back program in August 2022 which lapsed in September 2023. Our decision to prioritise investments in our platform over share buybacks reflects our confidence in the long term value of our investments. We believe this approach will yield strong returns and support our commitment to growth, thereby increasing the asset base, but we understand that some shareholders may have differing views and expectations.

Regarding Board and management renewal, today Andrew Saker retires as Managing Director and Chief Executive Officer after nine years of service. I want to express our gratitude for his leadership, commitment and for his achievements during his tenure.

Andrew has taken us from a small Australian based operation focused on a small number of cases, mostly class actions, to now having a truly global platform with operations in Australia, the United States, Asia, Canada, the UK, continental Europe, and the Middle East.

The Group has transformed from a balance sheet funder to a co-investor and manager of non-recourse financing investing in legal assets across unique fund structures, managing approximately $2.5 billion.

This has allowed Omni Bridgeway to scale rapidly, at lower risk and, as the funds mature, at higher risk adjusted returns.

During Andrew's tenure, estimated portfolio value has grown from $1.8 billion to $30.5 billion.

On behalf of everyone at Omni Bridgeway, I wish Andrew the very best for the future and record our thanks and appreciation for his accomplishments.

Executive Director, Managing Director and Co-Chief Investment Officer of EMEA, Raymond van Hulst, will be appointed Managing Director and Chief Executive Officer upon Mr Saker's retirement. The succession will take effect at the conclusion of this meeting.

Raymond previously held a wide range of senior roles having been a key member of the legacy Omni Bridgeway team for over 20 years. As such, he brings a breadth of experience of legal finance and legal asset management.

Since the merger with Omni Bridgeway Holding B.V in 2019, Raymond has focused on the globalisation of the enforcement investment strategy and the integration of the businesses. His experience will ensure continuity and stability during this transition.

We have also made important leadership appointments, further strengthening our team, including Guillaume Leger as Global Chief Financial Officer in September 2022, Hannah van Roessel as Co-Chief Investment Officer in EMEA in February 2023 and Ian Munro as Global Head of People and Culture in May 2023.

After 21 years of service, Michael Bowen stepped down as Non-Executive Director in November 2022. Following this, in line with our stated objective of Board renewal, in April 2023, we appointed Michael Green as Non-Executive Director based in the United Kingdom.

Michael's 30 plus years in the international financial services sector, including asset management, insurance, reinsurance, product and risk management, and business development and transformation, adds considerable experience to the Board.

He is currently the Chair and Independent Trustee of Lloyd's of London Pension Scheme and an Independent Non-Executive Member of the Investment Oversight Committee at London LGPS CIV Ltd which manages London Local Government Pension Scheme Ltd assets.

We also intend to appoint another northern hemisphere-based director, during the course of this financial year, to bring us closer to our most significant legal asset markets and the rich capital markets of UK, US and Europe. It will also provide us with further refreshment and renewal of the Board as well as succession optionality.

During the year, we also welcomed four new Investment Committee members, adding depth of expertise and outside perspective to our investment and risk assessment process.

In summary, with the exception of the share price, FY23 has been a year of notable achievement.

The Board and I are confident Raymond is exactly the right person to take the global platform that Andrew has built to the next level.

On behalf of the Board, I thank shareholders for their continued support through a difficult year. We will ensure your patience is rewarded.

I thank management and the global Omni Bridgeway team for a year of achievement and innovation. I also express my thanks to my colleagues on the Board for their counsel and advice during the year.

I would now like to introduce outgoing Managing Director and Chief Executive Officer, Andrew Saker, to address the meeting.

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Andrew Saker
Managing Director & CEO

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Significant growth in key drivers

For the 12 months ended 30 June 2023

Total gross income and revenue

$333.0m +51%

From diversified sources including secondary market sales

Commitments[1]

$544.2m +17%

Achieved a new record and our FY23 target

Funds under management

~$2.5bn

Across a balanced portfolio

NPAT 2H23 turnaround v 1H23

+203%

FY23 NPAT $0.9m

Estimated portfolio value (EPV[1])

$30.5bn +12%

After completions, removal of impairments, disposals

EPV conversion rate

14%

Life to date completed investments[2]

Cash and receivables[1]

$360.4m

Plus access to $60m debt
Including $129.2m OBL balance sheet

Implied embedded value (IEV)[1]

$3.9bn +9%

$1.0bn provisionally attributable to OBL, excluding management fees and potential performance fees[4]

ROIC

1.10x

IRR[3]

77%

Life to date completed investments[2]

1. Fund 5 is not consolidated within the Group Consolidated Financial Statements, here it is presented at 100%. Reflects completions in Funds 1 to 5 and OBL balance sheet since inception, excluding partial secondary market sales. Reflects Fund 6 completions since OBE acquisition in 2019, including investments acquired and funded
2. subsequently. Fund 1 includes metrics up to 31 May 2023, the date of its deconsolidation.
3. IRR information prior to FY12 is not available due to the difficulty in extracting it from legacy systems.
4. Further information on terms used in this presentation is available on slide 22 of the FY23 results presentation https://omnibridgeway.com/investors/reports-and-presentations/presentations and definitions of key concepts are included in our Glossary https://omnibridgeway.com/investors/omni-bridgeway-glossary

Address by Managing Director and CEO, **Andrew Saker**, to the AGM

On behalf of the management team and staff, welcome to the Annual General Meeting for Omni Bridgeway Limited for the financial year ended 30 June 2023.

I would like to start by acknowledging the impact of the challenges we've faced with our share price. Despite our efforts to address this and the strong performance of our business, the share price has remained weak. This has been difficult for all stakeholders, including insiders and myself.

The market's perception of the business doesn't align with our view of the strength of our operations. I believe that any criticism should not be directed at the hardworking team that has built what we consider the world's leading legal risk management platform.

Our team will continue to refine how we present Omni Bridgeway to the market, with a focus on improving the clarity and quality of our materials for our key capital markets. While we've made progress in this area, feedback from the market suggests a desire for further simplification and reduced noise in our messaging. This challenge falls to our new leadership team, and I have full confidence in their ability to address it.

The underlying business is strong and growing, we are improving our cash flow where it benefits Omni Bridgeway and our fund investors through judicious use of the secondary market to mitigate the vagaries of legal dispute timelines. Shareholders should not lose sight of the positive achievements of our business this year and in prior years.

- Of note, we have delivered total gross income and revenue to a record level of over $330 million, up 51% on last year. This was derived from diversified sources comprising both completions of investments and secondary market sales.
- We have materially grown annual commitments to a new record of close to approximately $550 million for the financial year, meeting the target for commitments we set in May of 2022, a growth of 17% in the year.
- Following on from the growth in commitments, and notwithstanding the record number of completions and secondary market sales in the year, and after impairments, our estimated portfolio value increased to a new record of over $30 billion, up 12% in the year. This progress stands in comparison to the $1.8 billion in EPV we had at 31 December 2014 when I joined what was then known as IMF Bentham.
- The growth in EPV has translated into a rise in the implied embedded value in our funds, marking a 9% growth over the year to $3.9 billion.
- Whilst attaining these milestones, we continue to have industry-leading performance metrics with a return on invested capital of 1.1 times and an internal rate of return of 77%.

We ended the year with a strong capital position with over $360 million in combined cash and receivables on a consolidated basis. Of that, the OBL balance sheet held around $130 million in cash and receivables, with access to an additional $60 million in debt which can be allocated for operational needs, fund investments and potential expansion opportunities. Whilst not recognised on a consolidated basis, OBL has provided its proportion of capital to its funds, so our cash and receivable position also includes approximately $40 million of those liquid assets.

The Group realised a profit after tax (before non-controlling interests), a notable 2H23 turnaround of $61.1 million and a 203% increase compared to 1H23. We achieved a 31% growth on a year-on-year basis in total income on a consolidated basis, which financed the continuing growth of our platform, such that profit after tax was relatively flat between the periods.

This expansion in our productive capacity delivered significant efficiency gains in key business metrics relating to our investment managers. We are leveraging our talent to produce more EPV per investment manager, up 22% to $341 million during the year, with new EPV per investment manager increasing 16% in the period to $138 million. This demonstrates that we can attract, retain, and develop some of the best talent in the industry globally. Furthermore, it also highlights we have generated significant value over and above costs for the period.

During this fiscal year, we successfully completed two strategic transactions, diversifying our income sources, and generating approximately $76 million in gross cash proceeds. One significant milestone was the sale of a participation in Fund 1 assets, allowing us to recycle capital, reduce portfolio risk, and accelerate returns. Secondary market transactions will continue to contribute to and diversify our future income, accelerate realisations, and mitigate risk across our portfolio.

We saw a 31% increase in management fee income compared to FY22. In FY24, the implied cost coverage ratio is expected to increase to approximately 23% compared to 16% in FY23.

We have seen the investment carrying value increase at a compounded annual growth rate, or CAGR, of 16% over the past four years to over $740 million after completions, the deconsolidation of Fund 1 in May 2023, secondary market sales and impairments. These investments are predominantly carried at cost and could see a material change if reported on a fair value basis.

The increase in the carrying value of investments was driven by approximately $270 million in deployments made by the Group towards both new and existing investments in FY23 to secure a strong future for our shareholders.

The key insight from our portfolio is that we remain focused on diversity across geographical regions, case types and capital sources.

The sale of a participation in Fund 1 assets, a US-focussed investment vehicle, has resulted in a rebalancing of our portfolio, making regional distribution more pronounced. Anticipating team expansion in the UK, we expect a further moderation of our US proportionate exposure in the future.

It has been my privilege to lead Omni Bridgeway and establish a global funds management platform across the Americas, APAC, and EMEA regions. Our specialisation in legal asset investments and our balanced and diversified portfolio have allowed us to scale rapidly while mitigating risks, leading to higher risk-adjusted returns.

Looking forward, we are well-positioned to capitalise on sustainable growth, leveraging operational efficiencies for greater returns.

On that note, this is my last Annual General Meeting as we transition to a new leadership era. I am confident that the company is in capable hands, and I wish the Group continued success in the future.

Our future success will be achieved through the unwavering commitment of the Omni Bridgeway team, which has demonstrated exceptional dedication to achieving our goals and providing access to justice for our clients.

It has been my privilege to lead this extraordinary team, and I thank them all for their efforts.

Thank you to our investors, the Board and management for the support they have extended to me over the past nine years.

I would now like to hand over to Raymond van Hulst to provide an overview of the Group's strategic focus areas.

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Raymond van Hulst

Incoming Managing Director & CEO

Address by incoming Managing Director and CEO, **Raymond van Hulst**, to the AGM

It is an honour to address today's meeting as the newly appointed CEO of this incredible company. I am excited to take on this role and I am humbled to be entrusted with this responsibility by the shareholders, fund investors and our team.

I bring with me 23 years of experience in, and a deep knowledge of, the legal finance industry. This started with the legacy Omni Bridgeway business, a company that was run with and profitably invested the proprietary capital of its five partners – including myself - and culminated in the merger of the Omni Bridgeway and IMF businesses in late 2019.

From this experience as successful private investor in the legal finance industry, I have learned that what truly matters are the fundamental principles of cost coverage, liquidity management, cash conversion and return protection. These principles have always guided my approach to this business and are demonstrated in the structure and metrics of both Fund 6 and Fund 8, for which I led the creation and launch.

I find it important to highlight that I continue to have strong alignment with our shareholders, noting that I have a significant shareholding, and own close to 5 million shares. This alignment means that my approach is more akin to that of a business owner with key investment metrics, prudent capital management and cost management, and optimisation of operational efficiencies as primary focus.

In addition to my commitment in delivering on these, there is another aspect of the business that I want to address, which is our unique position as a leader in the legal finance sector.

From my perspective very few investment assets can deliver the exceptional and uncorrelated financial returns that legal assets can, and no other peer comes close to Omni Bridgeway's track record in this area. Our consistently high success rate as reflected by our impressive return on invested capital of 110% and a 77% internal rate of return over multiple decades and throughout various economic cycles, set us apart and confirm our unique value generation capability.

Omni Bridgeway has been and continues to be at the forefront of this growing alternative asset class globally. We are the founders of the industry in Australia and Europe and secured first or early mover advantage in all relevant other markets and sectors. Omni Bridgeway has become the pre-eminent and only truly diversified asset management platform for legal assets globally, an industry with significant barriers to entry.

High investment returns reflect not only our success, but also form the basis for the trust and confidence our fund investors have placed in us. We are proud that all our high-profile institutional investors – who have deep industry and investment experience across multiple legal finance platforms – have selected Omni Bridgeway's new funds for continued investment. If we would not have been a leading high-quality platform, or if there were any fundamental flaws in our investment approach, these investors would not have reinvested in our new funds.

I am fortunate to step up to lead this company at a time when we have achieved our aspiration of becoming the global leader in legal finance. It is now time to leverage this valuable platform we have built.

I appreciate that the value we have created is not reflected in our current share price, which I acknowledge is a source of concern for me and other shareholders. I will address this through the strategic updates on which I will expand later.

I believe that duration risk or slippage has been the main concern for shareholders, as it has delayed the cash conversion.

Duration risk in my perspective is the basis of our business, as is damage risk for the insurance industry for example. Risk of legal loss, but more importantly duration uncertainty are the drivers for the exceptional investment returns that are generated by legal assets. We do not control duration, and do not consider duration uncertainty as negative, but we price for it to protect returns against delays. However, it is important that we enhance our forecasting capabilities and associated market disclosures.

Duration uncertainty primarily pertains to liquidity management rather than affecting the core value of our book. Improving cost coverage, supported by prudent secondary market transactions, will be my immediate focus to alleviate any market concerns on liquidity management.

During recent periods of slippage, we have nonetheless continued to build significant value for shareholders through our growing book of investments, which has not received full recognition from the market. I will strive to better explain this value.

I aim to provide a comprehensive update on my strategic focus areas during our half year results presentation in February 2024. That update will cover the changes we have already achieved at such time and will outline the further changes planned for the short and medium term.

My strategic focus areas include leveraging our platform to increase cost coverage and improve cost management. With the build out of our global platform now complete, we are turning our attention to optimising operational efficiency, improving fund terms, and increasing funds under management.

Simplifying reporting and allowing better comparison to our peers will also be key priorities.

Of immediate focus, are the FY24 goals. These include:

1. Finalising the establishment of Fund 8, our €300 million global enforcement fund – this was completed as announced in September 2023, when we entered into a debt facility for €135 million, representing the first tranche of the Fund 8 debt capital.
2. Achieving $625 million in new commitments or equivalent value through improved pricing and attribution terms - pleasingly, we have currently already secured 25% of the full year commitments target.
3. Accelerating realisations and mitigating risk through secondary market transactions – current status is that we aim to close a first transaction for the year shortly and will provide details upon completion.
4. Increasing funds under management via series II of Fund 4 and Fund 5 – we anticipate the first of several closings of the series II upsizing shortly.
5. Expanding the UK team to increase our presence in the second largest litigation finance market – this has also been completed, and, importantly, was included in the $95 million of cash operational expenses indicated for FY24.
6. Potential launch of new funds.
7. Exploring transition to or adding fair value disclosures.
8. Continued focus on other cost coverage improvement initiatives.

On all of these we are progressing well.

I would now like to take a moment to acknowledge the achievements of our outgoing CEO, Andrew Saker.

His vision and drive were the qualities which convinced the legacy Omni Bridgeway team to merge with IMF Bentham. It has been a privilege working with him over the last four years to successfully realise the synergies and growth envisaged with the merger.

That was no small feat. Studies, such as the Harvard Business Review, have shown that post-merger integration has general failure rates between 70% and 90%. IMF Bentham and Omni Bridgeway's merger process started in early 2020 and coincided with the start of the global pandemic. Navigating the merger complexities of combining operations, cultures, and resources across all continents, regulatory environments, and many different time zones, overlaid with the COVID difficulties of long term travel barriers and managing the existing business through the lockdowns, presented a formidable challenge.

Andrew and the IMF Bentham team approached this task with a firm "company first" mindset, further reflected by adopting the Omni Bridgeway name and, more recently, embracing the CEO transition.

The successful integration of the two businesses in this difficult context is a testament to the effective and committed leadership by Andrew.

I am excited about the future and the potential that lies ahead for the company and all its stakeholders.

We will continue to build on the strong foundation that has been laid and continue to extend the vision of global industry leadership and diversification. I am confident that we will achieve new heights of success and seize the significant opportunities that lie ahead.

Thank you for your commitment and support as we move forward on this journey.

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About Omni Bridgeway

Omni Bridgeway is the global leader in legal finance and risk management, providing dispute and litigation finance from case inception to post-judgment enforcement and recovery.

Listed on the ASX, Omni Bridgeway operates from 26 international locations.

omnibridgeway.com

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