OMNI BRIDGEWAY

FY21 Results

20 August 2021

OMNI BRIDGEWAY

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Highlights

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Result reflects the benefits of our diversification strategy

For the 12 months ended 30 June 2021

Income
$286.4m
Income yet to be recognised[1]
$135m+
Driven by strong 4Q21 case completions and a 2H21 skew

Conversion rate
22%
Higher than the long-term conversion rate (LTCR) of 15%

Record investment applications
1,727

Record commitments[2]
$412.6m up 32%
On track to meet $1bn annual target by FY25

Estimated portfolio value (EPV)[2]
$20.1bn
Up 27% on 30 June 2020

Implied embedded value (IEV)
$2.8bn
Up 37% on 30 June 2020

Funds under management
$2.4bn
On track to meet $5bn target by FY25

Life-to-date invested capital
$1.2bn
Over 50% yet to be realised

Strong cash and receivables
$359.8m
Driven by key completions and collection of receivables

1. Income of approximately $135 million to $270 million may be recognised in future periods. This potential income relates to investments, with an aggregate EPV of $535.2 million and expected completions in FY22, which had substantially completed prior to 30 June 2021 but did not fully satisfy the revenue recognition accounting standards and our policies.
2. Includes conditional and Investment Committee approved investments.

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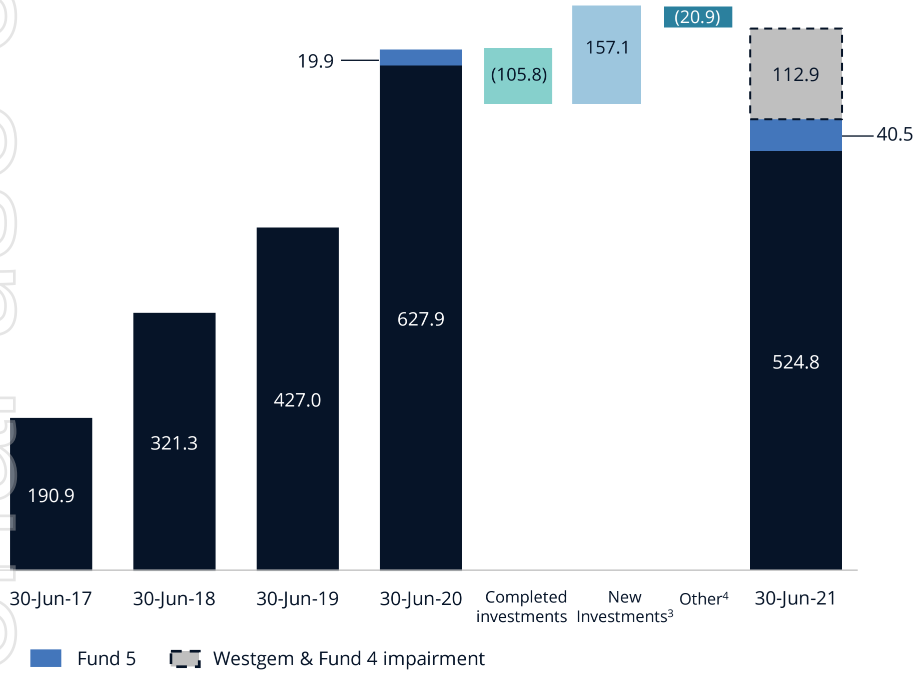
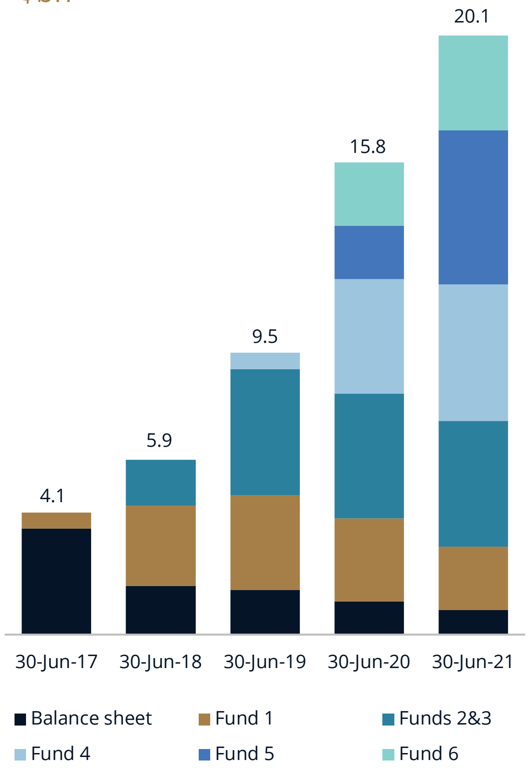
Portfolio growth will drive future income generation

Increasing commitments and EPV improve operational efficiency

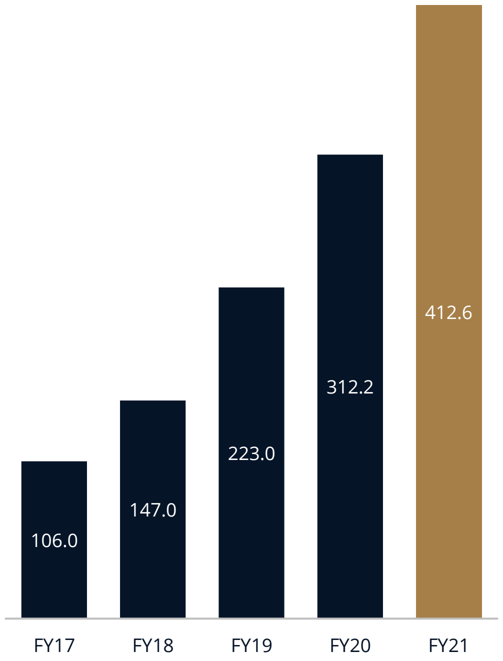
Investments carrying value[1]
CAGR >35% over 5 years
$m



EPV[1,2]
CAGR >42% over 5 years
$bn



Commitments[1,2]
CAGR >38% over 5 years
$m



1. Fund 5 and Fund 7 are not consolidated within the group financial statements. Here, Fund 5 is disclosed at 100%.
2. Includes conditional and Investment Committee approved investments.
3. New investments includes capitalised overheads.
4. Other includes impairments, save for Westgem and Fund 4 impairments, and foreign currency adjustment.

Benefits of merger delivered

- Omni Bridgeway is the global leader in financing and managing legal risks
- We manage a diverse portfolio of over 300 global investments across four legal asset classes: dispute resolution finance, legal working capital finance, enforcement finance and claims monetisation

	1 July 2015	30 June 2021
Jurisdictional coverage	Australia, USA, UK	Australia, USA, Canada, Asia, UK, EMEA, LatAM, NZ
Investments[1]	41	~300
EPV[1]	$2.0 billion	$20.1 billion
Team	42	180
Funds management	0 funds; direct investments on balance sheet	7 funds ~$2.4bn FUM

Strategic priorities

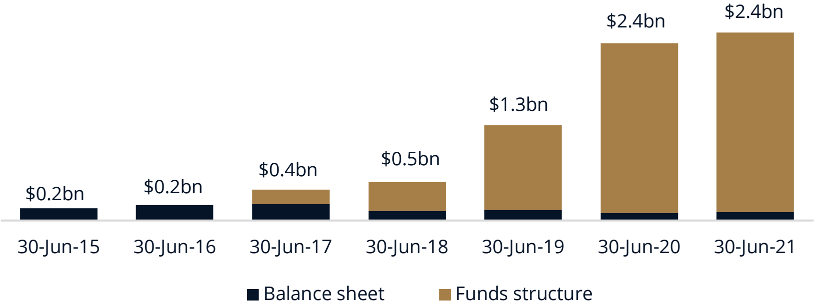
Continue expanding geographic footprint in South America, Africa, Asia

Strategic focus on growth in US market, with a target to double commitments

FY22 commitments target of ~$520m with ~$330m in deployments of which OBL's contribution is ~$65m

Continue recruitment of legal asset specialists and expansion of product offering

Full transition to funds management model expected by FY24



1. Includes conditional and Investment Committee approved investments.
Fund 5 and Fund 7 are not consolidated within the group financial statements. Here they are disclosed at 100%.

Financial results

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FY21 summary

Financials

- Earnings before provision for impairments was $88.2m
- 2H21 completions were strong generating $227.7m in income, with 1H21 completions reflective of the impact of COVID-19 delays on US Courts
- Statutory loss attributable to:
  - Provision for impairment of Westgem and a Fund 4 investment plus two other material losses in Funds 2&3
  - Foreign exchange (**FX**) adjustments; non-cash adjustments due to the strengthening AUD:USD exchange rate, but translates into lower AUD commitments to Funds for OBL contribution
- Operational expenses were flat during period
- Balance sheet less exposed to concentration risk post developments on key investments

OBE

- The first variable consideration tranche was paid in full together with the first deferred but unconditional consideration amount on 4 December 2020
- Eight co-funded merits and enforcement investments across the portfolio with combined EPV of $686m, encapsulating the early merger synergy benefit

Wivenhoe[1]

- $95.3m income recognised from 50% of the investment with an additional $18m income yet to be recognised[2] that may flow from the existing settlement
- The settlement of the remaining 50% portion of the liability, allocated to Seqwater, is subject to appeals and other court processes and represents $85m estimated future potential income[3]

Westgem and Fund 4 impairment[4] of $112.9m

- Two key investments were impaired to comply with accounting standards
- Both investments have positive prospects of success on appeal, as such these investments are retained in full in EPV assumptions at 30 June 2021
- No further update, but expect developments in FY22

Other

- At 30 June 2021, we had six Australian Class Action Lawsuits in managed investment schemes (**MIS**) with a combined EPV of $590m and an additional six class actions in advanced stages of due diligence
- Recent continuous disclosure changes in Australia anticipated to have no material impact

1. Refer to various ASX announcements relating to the Brisbane Floods (Wivenhoe) investment, in particular 10 May 2021.
2. $18m income yet to be recognised is the estimated future income that may flow from the existing settlement but that has not currently met IFRS income recognition criteria.
3. $85 million estimated future potential income is at the lower end of the announced range of $85 million to $220 million. The estimates are based on several assumptions and are subject to finalisation of the class action and associated distribution scheme. Wivenhoe's EPV of $253 million, with anticipated completion in FY22, is included in the group's total EPV assumptions on 30 June 2021. Refer to various ASX announcements, in particular 10 May 2021.
4. Refer to various ASX announcements.

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Financial results

$m	FY20	1H21	2H21	FY21	Change from FY20
Investment income	288.9	43.9	227.7	271.6	6% ▼
Investment cost derecognised/realised	(167.1)	(34.8)	(75.3)	(110.1)	34% ▼
Net gain from investments	**121.8**	**9.1**	**152.4**	**161.5**	**33% ▲**
Management and performance fees	1.4	1.4	3.0	4.4	214% ▲
Other income (incl foreign exchange & interest)	24.0	5.0	5.4	10.4	
Impairment expense	(17.2)	(107.0)	(13.7)	(120.7)	602% ▲
Overheads- employee expenses and corporate office expenses	(70.4)	(36.6)	(38.1)	(74.7)	6% ▲
Adverse costs	(4.2)	(13.9)	(1.4)	(15.3)	268% ▲
Other net operating expenses	(8.1)	(12.2)	(1.5)	(13.7)	69% ▲
Share of profit & loss from associates	(0.2)	(0.2)	(0.5)	(0.7)	
Fair value adjustments on financial liabilities	(13.6)	10.0	6.3	16.3	
Profit / (loss) before tax	**33.5**	**(144.4)**	**111.9**	**(32.5)**	**197% ▼**
Income tax benefit /(expense)	(15.9)	33.5	(19.5)	14.0	
Profit / (loss) after tax	**17.6**	**(110.9)**	**92.4**	**(18.5)**	**205% ▼**

	30 June 2020	31 December 2020	30 June 2021	30 June 2021	Change from 30 June 2020
Cash and cash equivalents	194.4	167.9	142.6	142.6	
Receivables from litigations contracts	124.4	62.5	197.6	197.6	
Cash and net receivables	**318.8**	**230.4**	**340.2**	**340.2**	**7% ▲**
Litigation contracts in progress (intangible assets)	517.2	399.9	391.0	391.0	
Other litigation investment assets	110.7	125.9	133.8	133.8	
Net assets	**767.2**	**651.2**	**762.3**	**762.3**	**1% ▼**
Number of shares	249.9	262.2	262.2	262.2	
Net asset backing ($ per share)	3.1	2.5	2.9	2.9	
Estimated portfolio value[1]	**15.8bn**	**$17.6bn**	**$20.1bn**	**$20.1bn**	**27% ▲**
Implied embedded value[2]	**$2.0bn**	**$2.3bn**	**$2.8bn**	**$2.8bn**	**37% ▲**
Number of investments[1]	**304**	**315**	**323**	**323**	**6% ▲**

1. Includes conditional and Investment Committee approved investments.
2. Excludes conditional and Investment Committee approved investments.

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Non-IFRS analysis

	IFRS				Adjustments	Non-IFRS
$m	FY20	1H21	2H21	FY21	FY21	FY21
Investment income	288.9	43.9	227.7	271.6	135.0	406.6
Investment cost derecognised/realised	(167.1)	(34.8)	(75.3)	(110.1)	-	(110.1)
Net gain / loss from investments	**121.8**	**9.1**	**152.4**	**161.5**	**135.0**	**296.5**
Management fees	1.4	1.4	3.0	4.4	-	4.4
Other income (incl foreign exchange & interest)	24.0	5.0	5.4	10.4	-	10.4
Total income	**147.2**	**15.5**	**160.8**	**176.3**	**135.0**	**311.3**
Impairment expense	(17.2)	(107.0)	(13.7)	(120.7)	112.9	(7.8)
Adverse cost	(4.2)	(13.9)	(1.4)	(15.3)	8.7	(6.6)
Net operating costs	(78.6)	(49.0)	(40.1)	(89.0)	-	(89.0)
Profit / (loss) before tax and fair value adjustments on financial liabilities	**47.1**	**(154.4)**	**105.6**	**(48.8)**	**256.6**	**207.8**
Fair value adjustments on financial liabilities	(13.6)	10.0	6.3	16.3	-	16.3
Profit / (loss) before tax	**33.5**	**(144.4)**	**111.9**	**(32.5)**	**256.6**	**224.1**
Income tax benefit /(expense)	(15.9)	33.5	(19.5)	14.0	(77.0)	(63.0)
Profit / (loss) after tax	**17.6**	**(110.9)**	**92.4**	**(18.5)**	**179.6**	**161.1**

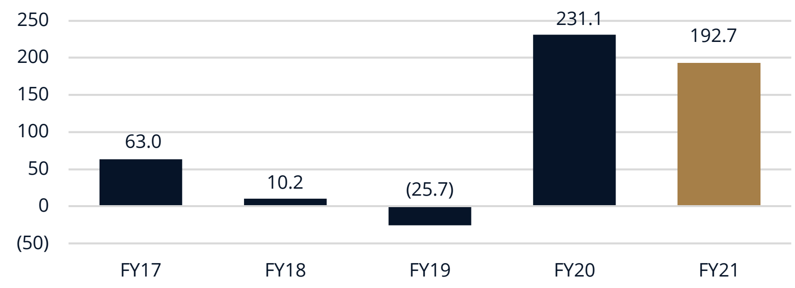
The P&L is adjusted for IFRS inconsistency on continuing cases between those that have been substantially won versus lost. The adjustments comprise:

- $135.0m investment income:
  - $18m[1] Wivenhoe first settlement
  - $85m[2] Wivenhoe second settlement
  - $32m income from other significantly complete investments in Fund 1, Funds 2&3, Fund 4
- $112.9m[3] impairment expense relating to Westgem and one investment in Fund 4
- $8.7m adverse cost relating to our net exposure on Westgem

Refer to slide 11 for the net operating cashflow.

$m	FY20	FY21
Proceeds from litigation funding	171.0	183.5
Proceeds from claims portfolio investments	15.0	11.0
Proceeds from disposal of a financial asset	9.7	-
Net interest	(4.6)	(6.8)
Other income	0.8	0.4
Movement in receivables balance	110.3	73.1
Cash generation	**302.2**	**261.2**
Net operational cash expenditure	(67.2)	(60.7)
Income tax paid	(3.9)	(7.8)
Cash burn	(71.1)	(68.5)
Net cash generation	**231.1**	**192.7**
Cash – direct balance sheet	133.2	100.0
Cash – consolidated funds	61.2	42.7
Receivables balance – direct balance sheet	70.0	117.2
Receivables balance – consolidated funds	54.4	80.4
Total cash and receivables balance	**318.8**	**340.3**

Net cash generation



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2. $85 million estimated future potential income is at the lower end of the announced range of $85 million to $220 million. The estimates are based on several assumptions and are subject to finalisation of the class action and associated distribution scheme. Refer to various ASX announcements, in particular 10 May 2021.
3. Refer to various ASX announcements.

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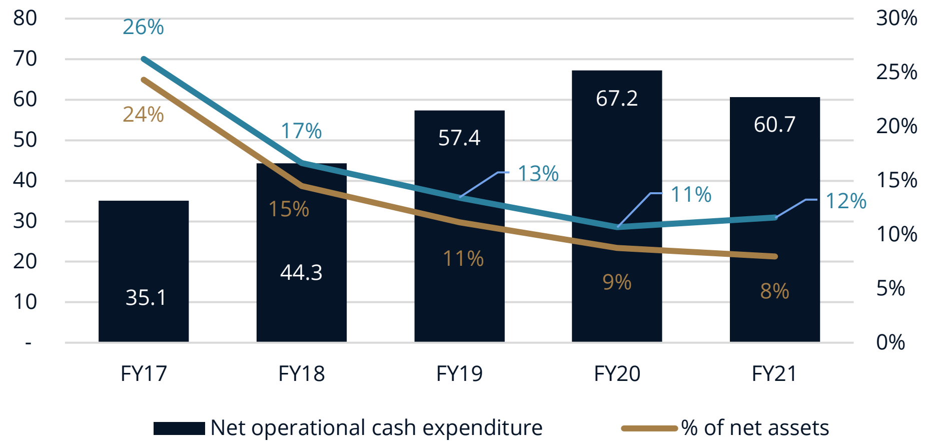
Net operational cash expenditure

$m	FY20	FY21
Per Profit and Loss statement		
Amortisation of claims portfolio	(14.5)	(1.6)
Finance costs	(1.4)	(1.5)
Depreciation expense	(2.9)	(3.1)
Employee benefits expense	(50.3)	(57.5)
Corporate and office expense	(20.0)	(17.2)
Impairment expense	(17.2)	(120.7)
Adverse costs	(4.2)	(15.3)
Other expenses	(3.8)	(9.1)
	(114.5)	(225.9)
Include: capitalised items		
Employee costs	(10.4)	(9.7)
Borrowing costs	(10.4)	(9.0)
Overheads	(0.5)	(0.5)
	(21.3)	(19.2)
Deduct: non-cash items and one-offs		
Amortisation of claims portfolio	14.5	1.6
LTIP	9.1	16.6
STIP – accrued and unpaid	9.6	0.5
NCI contribution to Fund 6 costs	4.5	13.1
Professional advisors and transaction costs	5.1	3.2
Adverse costs	4.2	15.3
Depreciation expense	2.9	3.1
Net foreign exchange (gain) / loss	-	5.9
Impairment expense	17.2	120.7
	67.1	**180.0**
Operational cash expenditure	(68.6)	(65.1)
Management fees	1.4	4.4
Net operational cash expenditure after management fees (net opex)	(67.2)	(60.7)
Management fees / net opex	2%	7%
Net opex / net assets	9%	8%
Net opex / investments	11%	12%
Net opex / EPV	<1%	<1%
Net assets	767.2	762.3
Headcount – full time equivalent	159	175
Number of offices	18	18

- Operational cash expenditure has remained relatively flat despite 27% growth in EPV
- Operational efficiencies achieved
- Management fees cover ~7% of net operational cash expenditure
- Employee benefits expense increased by 14% primarily relating to the long term incentive plan (**LTIP**) expense
- A short term incentive plan (**STIP**) was awarded in FY20 but not in FY21
- The increase in impairment expense was primarily driven by the $112.9m impairment of two investments; Westgem and a Fund 4 investment
- FY22 estimated forecast of operational cash expenditure is $65m to $75m

Operational efficiencies



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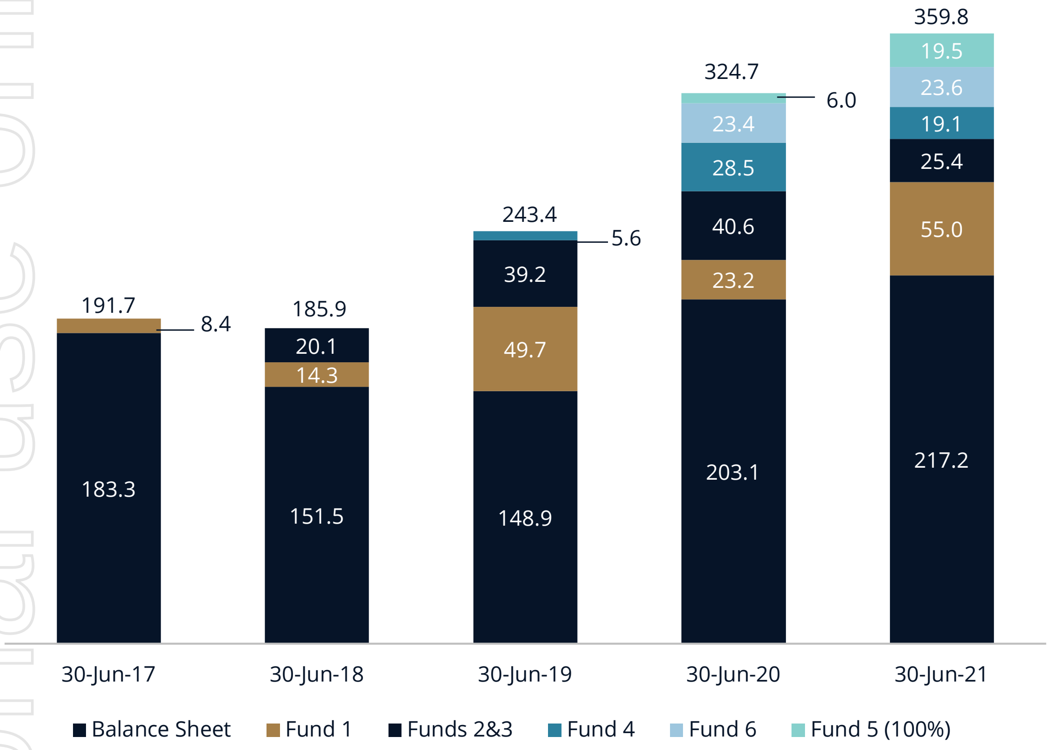
Strong capital position to support corporate initiatives

Cash and receivables[1]
$m



Strong capital position to support corporate initiatives including:

- the transition towards a funds management model
- organically funding our growth and future opportunities
- meeting our deployment obligations
- maintaining adequate liquidity commensurate to the global business needs
- prudent capital management, including the potential to repay debt, pay dividends and buy back shares

The Group will look to reduce its overall cost of capital and improve capital efficiency through:

- seeking to refinance existing debt facilities[2]
- establishing a revolving credit facility

1. Fund 5 and Fund 7 are not consolidated within the group financial statements. Here they are disclosed at 100%.
2. The window to accelerate bonds and notes is from 8 January 2022 to 22 December 2022.

Portfolio performance

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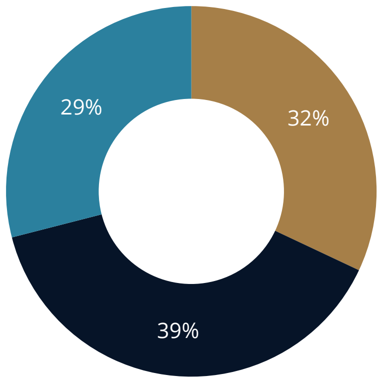
Balanced portfolio created by diversified EPV

- EPV grew to $20.1 billion[1] in FY21 in line with the net increase in investments offsetting completions
- Diversification provides mitigation to risk of competition and regulatory intervention and portfolio concentration

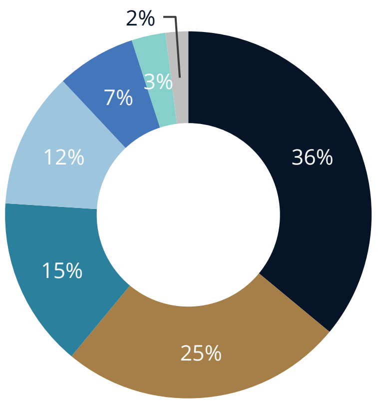
EPV by region



APAC | North America | EMEA

Balanced portfolio with growth potential in all regions, particularly in the US over the short term

EPV by investment type

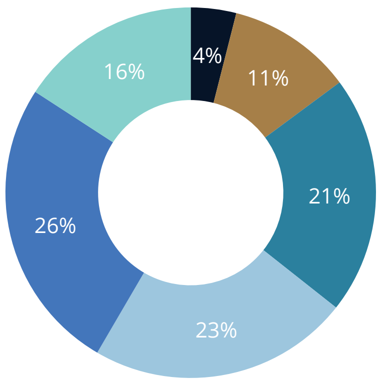


Single party | Class actions | Arbitration | Fund 6 – merit | Law firm | Fund 6 – enforcement | Other*

* Includes appeal, commercial, corporate funding, patent and other IP

Global class action investments now represent only 25% of our portfolio from 40% at 30 June 2019 (pre-merger) and from 57% at 30 June 2015 (pre-funds management model)

EPV by funding source



Balance sheet | Fund 1 | Funds 2&3 | Fund 4 | Fund 5 | Fund 6

Balance sheet is in 'run off' as we continue our transition to a fund management model, whereby investments are funded through dedicated investment vehicles with global co-investors and joint venture structures

1. Includes conditional and Investment Committee approved investments.
Fund 5 and Fund 7 are not consolidated within the group financial statements. Here they are disclosed at 100%.

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Portfolio performance review[1]

				Amounts attributable to investors		Amounts attributable to Omni Bridgeway		Current investments				Completed investments								
																Success rate				
Fund	Launch date	Fund size	Committed	Capital	Returns[2]	Capital	Fees	#	Average duration	EPV[3]	IEV	#	Average duration	EPV	EPV conversion rate	Legal outcome[4] # investments	Financial outcome[4] # investments	Financial outcome[4] $ weighted average	ROIC[5]	IRR[5]
Fund 1	Feb-2017	USD172m	100%	$56.3m	$52.7m	$55.5m	$7.3m	22	4.5 yrs	$2,065.4m	$309.8m	26	2.9 yrs	$1,287.7m	13%	88%	69%	74%	54%	22%
Funds 2&3	Oct-017	AUD189m	98%	$53.2m	$29.0m	$23.7m	$3.0m	29	2.1 yrs	$4,131.6m	$619.7m	13	1.4 yrs	$395.2m	18%	77%	77%	45%	91%	113%
Fund 4	Apr-2019	USD500m	34%	$129.3m	-	$32.1m	-	16	0.9 yrs	$4,581.0m	$687.2m	2	0.4 yrs	$198.7m	15%	100%	100%	100%	22%	201%
Fund 5	Sept-2019	USD500m	35%	$60.7m	-	$15.2m	-	31	0.7 yrs	$3,777.6m	$566.6m	3	0.8 yrs	$96.0m	29%[6]	67%	67%	99%	49%[6]	30%[6]
Fund 6	Jan-2017	EUR150m	92%	$105.3m	-	$5.5m	-	187	5.0 yrs	$3,178.8m	$476.8m	172	3.3 yrs	n/a	n/a	n/a	68%	72%	298%	160%
Fund 7	Jul-2019	USD100m	-	$1.3m	-	$3.3m	-	-	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Fund total				$406.1m	$81.7m	$135.3m	$10.3m	285		$17,734.4m	$2,660.1m									
Balance sheet				-	-	-	-	13	6.2 yrs	$838.2m	$125.7m	91	3.0 yrs	$3,570.4m	21%	85%	76%	75%	146%	82%
Portfolio total				$406.1m	$81.7m	$135.3m	$10.3	298	4.5 yrs	$18,572.6m	$2,785.8									

- Fund 1 is fully committed and Funds 2&3 are 98% committed; all are in harvest mode. Given the fund structure, the investors have priority entitlement to distribution of capital and preferred returns, recourse only to the investments within the respective Funds. There are a substantial number of investments and associated EPV within each of those Funds from which those priority entitlements can be met.
- Funds 4 and 5 are partially committed, and have the option to recycle proceeds from completed investments. The investment periods complete four years from commencement, with a run-off harvest period that follows.
- Funds 6 and 7 are similar to Funds 4 and 5, and structured on a waterfall basis except that with respect to Fund 7, funds are first allocated towards the IFC debt before allocations are made via the waterfall.

1. Data covers the period from 1 July 2011 for the balance sheet investments and each of the Funds from their dates of inception. Fund 5 and Fund 7 are not consolidated within the group financial statements. Here they are disclosed at 100%.
2. Returns for Funds 1 – 3 include accumulated preferred returns and special distributions.
3. Excludes conditional investments and Investment Committee approved investments.
4. A successful legal outcome is one where the client wins a return through settlement or judgement; a successful financial outcome requires the Group's income to exceed investment costs.
5. Return on invested capital (ROIC) and internal rate of return (IRR) is measured before capitalised overheads and operating overheads.
6. Audit adjustments to constrain income recognised at this point in time.

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OBL value > first generation funds (Fund 1, Funds 2&3)

Indicative analysis[1] of the first generation funds' return to OBL parent entity based on their current portfolio

IEV attribution

At 30 June 2021	Fund 1	Funds 2&3
Called capital	US$125.0m	$94.8m
Accumulated preferred return	US$46.1m	$24.0m
Accumulated special distribution	US$1.8m	$5.0m
Subtotal	**US$172.9m**	**$123.8m**
Less: distributions paid	US$91.0m	$41.6m
Less: distributions paid post 30 June 2021	US$33.1m	-
Net attributable to NCI	**US$48.8m**	**$82.2m**
Net attributable to NCI (AUD equivalent)	$64.9m	$82.2m
Less: IEV	**$309.8m**	**$619.7m**
IEV in excess of NCI	**$244.9m**	**$537.5m**
OBL called capital	$55.5m	$23.7m
OBL accumulated management fee	$7.3m	$3.0m
Subtotal	**$62.8m**	**$26.7m**
Residual IEV	**$182.1m**	**$510.8m**
Residual profit share % to OBL	85%	80%
Residual profit share to OBL	**$154.8m**	**$408.6m**

Estimated portfolio value and implied embedded value

			Possible completion EPV					
At 30 June 2021	# Investments	Deployed capital	Total	FY22	FY23	FY24	FY25+	**IEV**
Fund 1	22	$150.3m	$2,065.4m	$227.4m	$1,310.9m	$186.3m	$340.8m	$309.8m
Funds 2&3	29	$66.4m	$4,131.6m	$1,003.6m	$2,068.7m	$332.3m	$727.0m	$619.7m

- Each Fund has considerable IEV potential to:
  - return capital and distribute preferred returns to NCI investors
  - distribute capital and fees to OBL
  - provide material profit splits to both OBL and NCI investors
- Assuming achievement of IEV and estimated completion dates, OBL should commence receiving cash distributions for:
  - Fund 1 in FY23
  - Funds 2&3 in FY22[2]

1. This analysis is not earnings guidance or a forecast. Past performance is not necessarily an indicator of future performance. This analysis is based on the hypothetical scenario of all of the portfolio investments completing at the LTCR to their respective EPV at 30 June 2021. In practice, the portfolios will complete over multiple time periods and the interim EPVs may vary and they may ultimately complete below or above the LTCR. Prior to the full return of capital to the investors, preferred return will continue to accrue.
2. The analysis ignores possibility of further capital calls being required.

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OBL value > second generation funds (Fund 4, Fund 5)

Indicative analysis[1] of the second generation funds' return to OBL parent entity based on illustrative example

Example investment return

		Investment	
		Via Fund	Direct
Claim size	A	$100.0m	$20.0m
Invested capital	B	$10.0m	$2.0m
Litigation life	C	3 years	3 years
Return from win	D	30%	30%
Proceeds from win	E=Ax50%[2]	$50.0m	$10.0m
Investment income	**F=(D*E)+B**	**$25.0m**	**$5.0m**
Investment IRR		**57%**	**57%**
Investment ROIC		**150%**	**150%**
OBL ownership interest	G	20%	100%
OBL contribution to invested capital	BxG	$2.0m	$2.0m
OBL share of investment income	FxG	$5.0m	$5.0m
OBL performance fee	**based on waterfall**	$3.2m	n/a
OBL investment return		**$8.2m**	**$5.0m**
OBL management fee %		2%	n/a
OBL management fee	**on invested capital deployed**	$0.3m	n/a
Total to OBL		**$8.5m**	**$5.0m**
OBL IRR		**98%**	**57%**
OBL ROIC		**325%**	**150%**

Estimated portfolio value and implied embedded value

				Possible completion EPV				
At 30 June 2021	# Investments	Deployed capital	EPV	FY22	FY23	FY24	FY25+	IEV
Fund 4	16	$136.0m	$4,581.0m	$189.8m	$1,005.5m	$2,425.7m	$959.9m	$687.2m
Fund 5	31	$53.0m	$3,777.6m	$341.9m	$1,245.0m	$1,197.5m	$993.2m	$566.6m

- Based on the example investment return via Fund OBL contributes 20% of the invested capital and receives ~34% of the investment income, including the 2% management fee on the invested capital deployed
- Each Fund has considerable EPV, IEV and significant additional capacity available to make new investments to generate substantial returns to both OBL and Fund investors (NCI)

1. This analysis is not earnings guidance or a forecast. Past performance is not necessarily an indicator of future performance. This analysis is provided as an indicative working example of the waterfall return structure of these funds.
2. Assumes the claim completes at 50% of the claim size.

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OBL value > purchased funds (Fund 6, Fund 7)

Indicative analysis of the fund return value to OBL parent entity based on based on their current portfolio

Return profile $m

At 30 June 2021	Number	Cost	PPA	Consolidated total	EPV
Acquisition date	178	59.8	103.5	163.3	
Additions	-	7.4	(0.1)	7.3	
Completions	(36)	(9.5)	(11.9)	(21.4)	
Withdrawn / terminated	(1)	-	-	-	
Other costs	-	-	-	-	
FX adjustment	-	(1.0)	(1.7)	(2.7)	
Net acquired portfolio	**141**	**56.7**	**89.8**	**146.5**	**1,696.9**
IEV on acquired portfolio					**254.5**
Additions	51	10.0	**n/a**	10.0	
Completions	(5)	(1.8)	**n/a**	(1.8)	
Withdrawn / terminated	-	-	**n/a**	-	
Other costs	-	-	**n/a**	-	
FX adjustment	-	-	**n/a**	-	
Net new portfolio	**46**	**8.3**	**n/a**	**8.3**	**1,482.0**
IEV on new portfolio					**222.3**
Total IEV					**476.8**

Estimated portfolio value and implied embedded value

				Possible completion EPV				
At 30 June 2021	# Investments	Deployed capital	EPV	FY22	FY23	FY24	FY25+	IEV
Fund 6	187	$89.9m	$3,178.8m	$399.3m	$844.9m	$606.8m	$1,327.8m	$476.8m

- The remaining portion of Fund 6 investment portfolio that existed at the time of the November 2019 acquisition of OBE is carried at the assessed fair value which was $146.5m at 30 June 2021
- Investments made since the acquisition are carried at cost
- The EPV and IEV of the portfolio can be utilised the same way as in the OBL raised funds; with the income subject to waterfall arrangements depending upon the nature of underlying investment
- Historically in Fund 6, ~25% of the proceeds from completed investments have been attributed to OBE - this is an overall average that does vary by investment type

Strategy

Fund 5 and Fund 7 are not consolidated within the group financial statements and are disclosed at 100%.

OMNI BRIDGEWAY

Creating value through our diversified model

Goal	Strategy	Status at 30 June 2021
Geographical expansion	Americas	• US team growth, office expansions underway, exploring new office locations • Canada team growth, exploring Calgary • Latin America market assessment, strategy and remote servicing
	APAC	• Auckland, New Zealand resources in situ • Exploring India
	EMEA	• Madrid, Spain resources in situ • North Africa exploring debt servicing operation
Expanded service offerings	• Acquiring claims, judgments awards • Funding law firm receivables • Downside risk management	• 14 purchased claims in the portfolio • Assessing M&A opportunities
Capital structure	• Launch new fund • Increase commitments via Funds	• EPV up 27% on FY20 to $20.1 billion • FY21 capital commitments $412.6m, up 32% on FY20
Funds	• Scale and diversification	• Exploring secondary market opportunities for accelerating recoveries in Funds

FY25 target[1]

- $5bn FUM
- $1bn annual commitment

FY22 target[1]

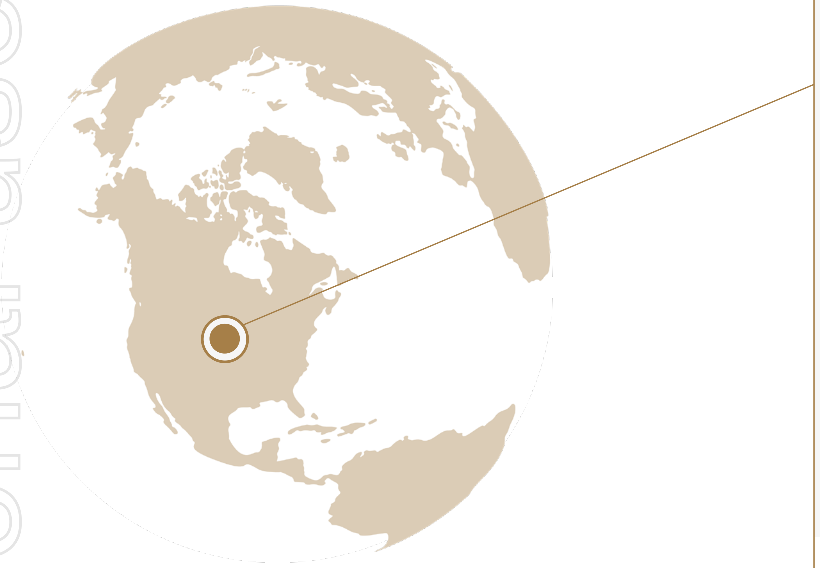
- Commitments of ~$520m with ~$330m in deployments of which OBL's contribution is ~$65m
- Launch Fund 8 (enforcements) with €300 million capital raising
- Refinance debt and revolving facility to reduce overall cost of capital and improve capital efficiency
- Execute upon US strategic plan

1. Represents aspirational objectives of how we aim to achieve our overall strategic priorities. They are not a forecast.
Fund 5 and Fund 7 are not consolidated within the group financial statements and are disclosed at 100%.

OMNI BRIDGEWAY

Strategic focus on US growth

The US market is the largest market, globally, and represents the greatest potential for growth and penetration



Our strategic priorities are to:

- Grow our FY22 US commitment target to A$225 million in new investments, up 105% from FY21 actual
- Expand geographically with one new office, most likely in Washington DC or Boston, support our “boots on ground” approach
- Diversify the portfolio through new product offerings
- Improve efficiency ratios of term sheet conversion, days in due diligence and funds committed per investment manager
- Employ more sophisticated risk management tools, such as portfolio insurance products
- Explore secondary market opportunities to accelerate returns in funds
- Expand headcount from 20 to 50 by end of FY22
- The additional 30 employees will comprise a mix of skills including investment managers, associate investment managers, legal counsels, financial analysts, support staff and enforcement team.
- The anticipated costs will be partially offset by recent reallocation of overheads

Annexure

OMNI BRIDGEWAY

Industry pioneer and best-in-class operator with global scale

Omni Bridgeway is the world's most experienced litigation funder

Global pioneer and innovator in the development of the modern legal assets investment industry with 30+ years of experience in funding and assisting enforcement and asset recovery proceedings globally.

$2.8bn implied embedded value[1]	298 active investments[1]	7 Funds launched
$2.4bn funds under management	$1.2bn life to date invested capital	$20.1bn estimated portfolio value[2]

… boasting an enviable track record of success …

We provide funding and services to clients on a limited recourse basis to the client's recoveries in the legal dispute.

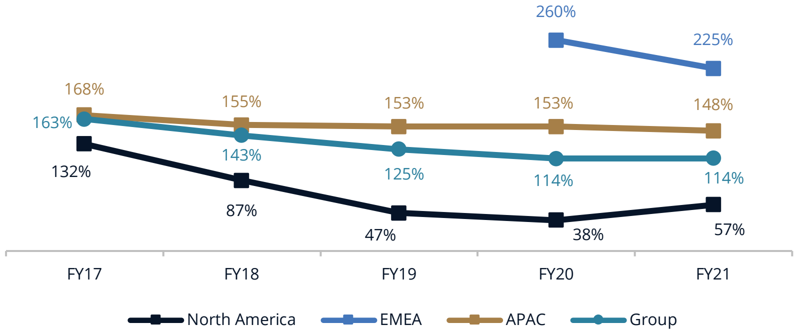
We invest in legal assets across the dispute resolution spectrum, financing disputes from inception through trial, appeal, enforcement and recovery. The acquisition of OBE provided added expertise in post-judgment or award enforcement and recovery, and non-performing loans.

… with an unmatched global reach and origination framework …

Presence in every major time zone with funding capabilities in nearly every region. Led by 180 specialists focused on origination and investment management, and three Investment Committees supported by multidisciplinary in-house intelligence, asset-tracing and legal professionals.

Track record of success

Return on invested capital (ROIC)[5,6]



ROIC is generated over the duration of the investments. On a Group basis the ROIC has remained reasonably stable over time.

1. Excludes conditional and Investment Committee approved investments.
2. Includes conditional and Investment Committee approved investments.
3. Success rate by number of completed investments. A successful legal outcome is one where the client wins a return through settlement or judgment.
4. Data covers the period from IMF inception and since OBE merger.
5. This data has been reviewed by Ernst & Young to 31 December 2020 and has been updated to 30 June 2021 by management.
6. ROIC is measured before capitalised overheads and operating overheads and is calculated on a rolling basis for IMF since 1 July 2011 and for OBE since the merger.

Fund 5 and Fund 7 are not consolidated within the group financial statements and are disclosed at 100%.

OMNI BRIDGEWAY

Worldwide sourcing network and enforcement capabilities

We have a signficant global sourcing network and capability for the execution of enforcement strategies and investments

Our network supports the sourcing and management of mixed investments (merits and enforcement risk)

Further growth of the enforcement team in North America and APAC is planned

180	30+	12	20
Specialists located throughout the world	Languages	Countries	Locations

All data at 30 June 2021.

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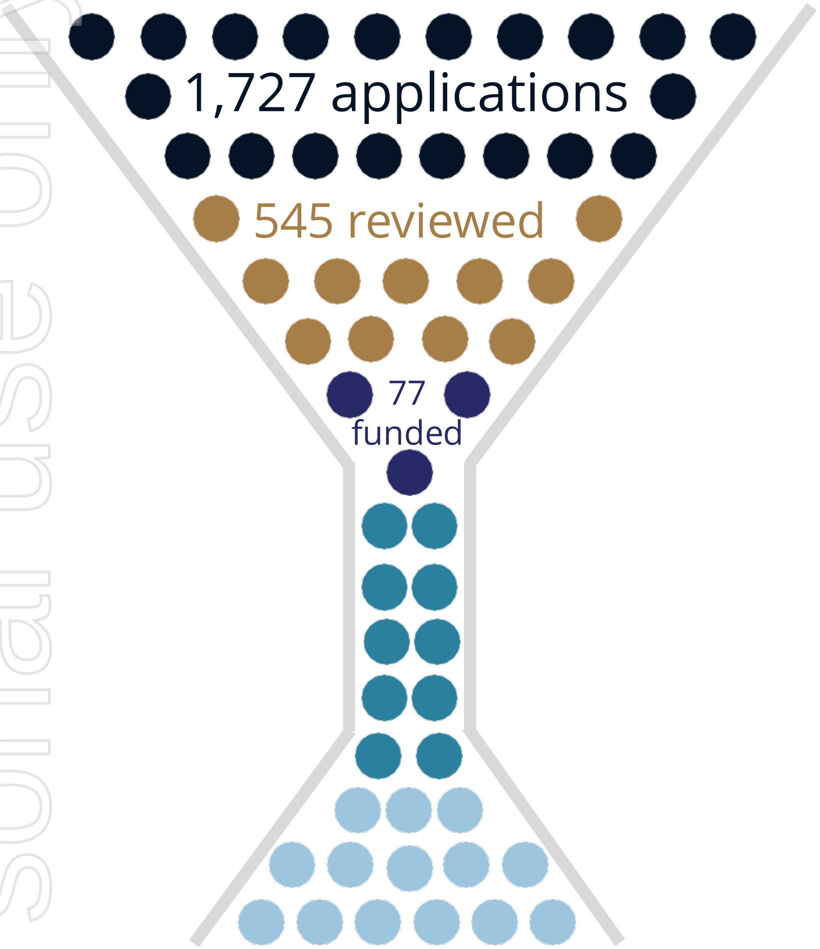
The investment process

In FY21, of the 1,727 applications received, 545 were reviewed.
A total of 77 investments were funded.



1. Origination

- Opportunities are primarily originated through potential clients, advisors, other third parties or internally by formulating a funding idea before an approach from a third party
- The investing process generally begins with the execution of a confidentiality agreement
- The claim is then outlined by the client and their legal representative

2. Application review

- Opportunities are evaluated by assessing numerous factors, including the type and strength of case, financial analysis, legal fee arrangement, and the likely length of time to resolution, an estimate of the amount of investment capital required to completion, and the defendants' ability to satisfy a judgment

3. Funding decision

- The relevant Investment Committee (**IC**) receives a due diligence report which is prepared by the Investment Manager (**IM**)
- The IC decides whether to recommend to the applicable fund

4. Monitoring and realisation

- An investment may take between 1 and 5 years to complete with completed investments averaging a duration of 2.8 years
- The IM will monitor development in the investment as it progresses and receive periodic updates from the lawyers
- Where the prospects of an investment have materially changed and need to be re-evaluated the IC is consulted
- In certain jurisdictions such as Australia, we may provide strategic guidance concerning the investment and settlement opportunities
- Given alignment of interest with our clients to maximise the value of investments we have insight into the settlement process

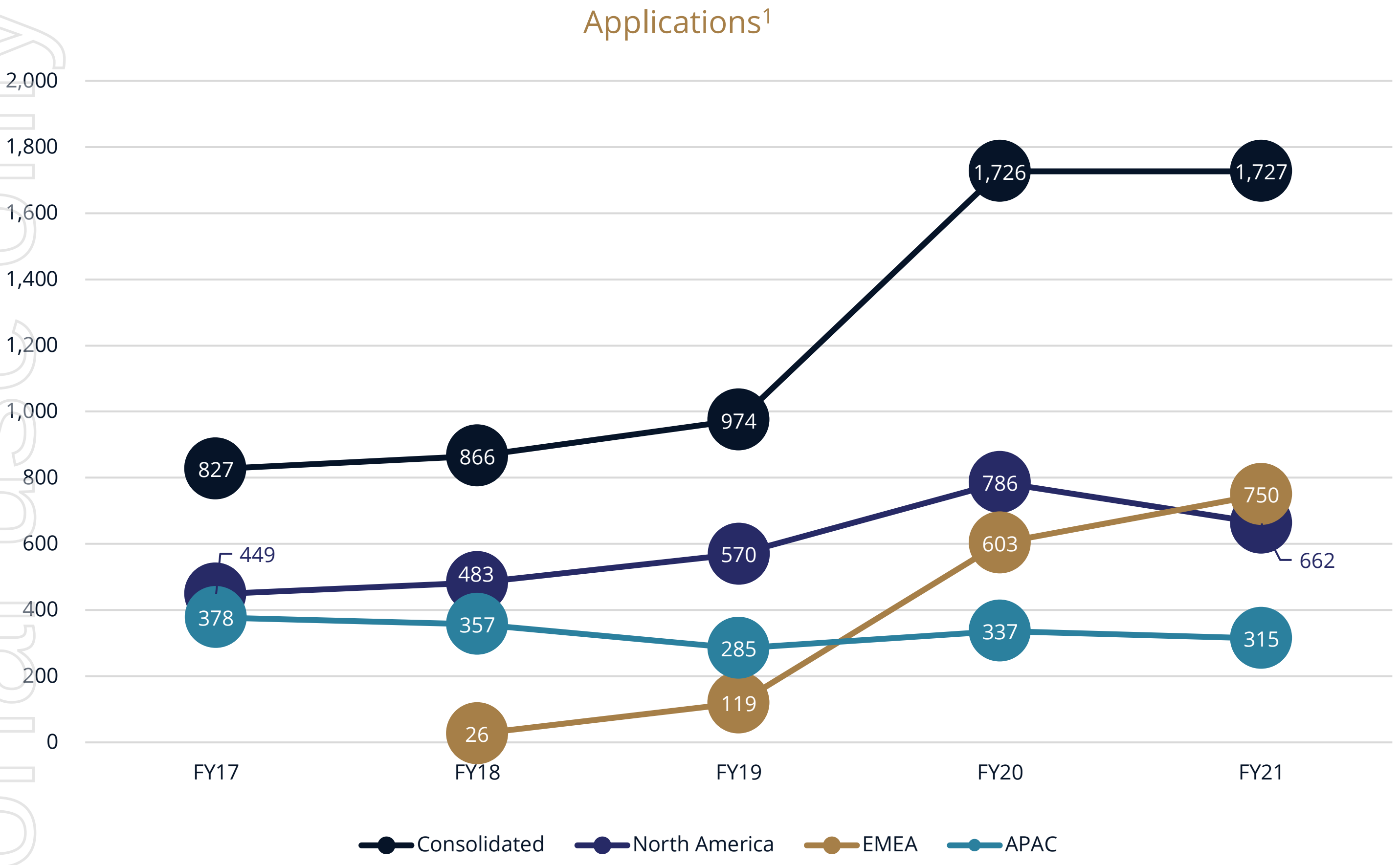
5. Distribution of proceeds

- If an investment is successful, the defendant will pay an agreed amount to the claimant's lawyers trust account
- The lawyer will deduct the fees owning to the Group and pay the balance of funds to the client
- If the claim fails, the Group may be responsible for paying the defendant's costs on the terms agreed with client (if not covered by After The Event or Adverse Cost insurance)

1. Data current as at 19 August 2021.

OMNI BRIDGEWAY

Funding pipeline



- Record 1,727 funding applications received in FY21
- Funding applications continue to grow as we achieve our geographic expansion
- We maintained the conversion rate at 3%-5% in FY21 with 77 new investments made with an EPV of $7.6bn
  - EMEA made $109.4m of new investments with an EPV of $3.3bn
- Australian class actions continue to be a source of investment opportunities given reduction in competition

1. FY20 has been restated to reflect the inclusion of the number of OBE applications.
Fund 5 and Fund 7 are not consolidated within the group financial statements. Here they are disclosed at 100%.

OMNI BRIDGEWAY

Funding structure overview

Our funding strategy has evolved over time to diversify investment risk, from initially investing on balance sheet to bringing in third party capital while maintaining a meaningful minority stake in each of our Funds

Group ownership
Fund 6 ownership

Omni Bridgeway Limited

ASX listed entity: OBL

- FY21 invested capital[1] of $678.2m across balance sheet and fund level investments
- $148.0m in Bonds and Notes have partially funded investments made by the Group

100%

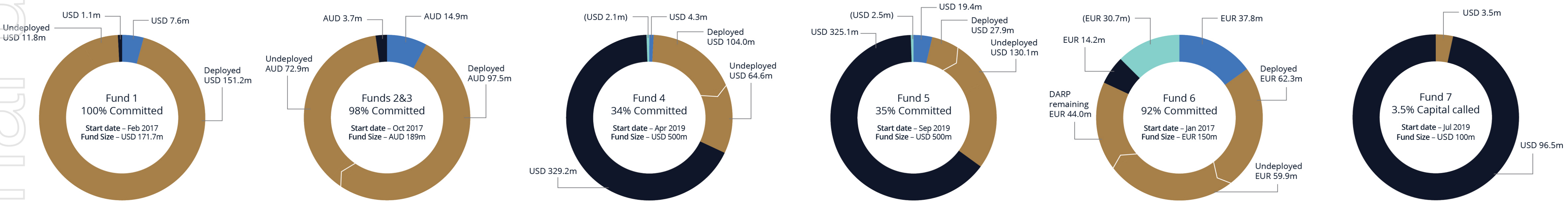
Balance sheet investments

13 Investments | 2017 Last investment made

- In 'run-off' phase with 13 outstanding investments at 30 June 2021
- No new investments have been made via balance sheet since Funds 2&3 were launched in 2017

25% | 20% | 20% | 20% | 5% | 50%

Fund 1 – USA | Funds 2&3 – RoW[2] | Fund 4 – USA | Fund 5 – RoW[2] | Fund 6 – OBE | Fund 7 – DARP[3]



Fund 1: Committed (incl. funding approved, conditionally funded); Available capital; Other costs

Funds 2&3: Committed (incl. funding approved, conditionally funded); Available capital; Other costs

Fund 4: Committed (incl. funding approved, conditionally funded); Available capital; Recycled receipts; Other costs

Fund 5: Committed (incl. funding approved, conditionally funded); Available capital; Recycled receipts; Other costs

Fund 6: Committed (incl. funding approved, conditionally funded); Available capital; Recycled receipts; Other costs

Fund 7: Capital called; Undrawn capital

1. Invested capital includes capitalised overheads and purchase price fair value adjustments with respect to the OBE business combination. Fund 5 and Fund 7 are not consolidated within the group financial statements. Here, Fund 5 is disclosed at 100%. Includes the reversal of the $112.9m impairment.
2. Rest of world.
3. Distressed Asset Recovery Program.

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Distribution of Fund proceeds

- If an investment is successful, the defendant will pay an agreed amount to the claimant's lawyers trust account
  - The lawyer will deduct the fees owing to the Group and pay the balance of funds to the client
  - If the claim fails, the Group is responsible for paying the counterparty's costs on the terms agreed with the client, if it is not covered by ATE or AC insurance
- In addition, damages are not always awarded in cash. Investment Managers require the ability to appraise non-cash collateral when pricing the risks of an investment prior to the funding decision, and require the ability to collect varying forms of collateral for monetisation
- The Group has an established track record of identifying, appraising and collecting non-cash collateral in a variety of jurisdictions

	Fund 1	Funds 2&3	Fund 4	Fund 5	Funds 6&7
Type	**European whole of fund**	**European whole of fund**	**American deal by deal**	**American deal by deal**	**Hybrid whole of fund** **Merit investments + Fund 7**
Waterfall	1. Investor capital 2. Investor preferred return 3. Investor undrawn fee 4. Group management fee 5. Group capital 6. Profit distribution: Group 85% Investor 15%	1. Investor capital 2. Investor preferred return 3. Investor undrawn fee 4. Group management fee 5. Group capital 6. Profit distribution: Group 80% Investor 20%	1. Investor capital (including the Group) 2. Hurdle 8% 3. Catch-up 4. <20% IRR, 80% to investors (incl the Group) 20% performance fee 5. Profit distribution : Group 30% performance fee Investors (incl the Group) 70%	1. Investor capital (including the Group) 2. Hurdle 8% 3. Catch-up 4. <20% IRR, 80% to investors (incl the Group), 20% performance fee 5. Profit distribution: Group 30% performance fee Investors (incl the Group) 70%)	1. Capital 2. Hurdle 10% 3. Performance fee; IRR <20%, 20% IRR >20%, 30% 4. Balance to investors (incl the Group) pro rata **Enforcement investments** 1. Investor capital 2. Hurdle IRR 20% 3. Profit distribution (Group 100%)
Management fee	Part of waterfall return	Part of waterfall return	Paid quarterly	Paid quarterly	As called
Capital recycling	Not permitted	Not permitted	Permitted	Permitted	Permitted

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Non-controlling interests (NCI)

$m	Fund 1	Funds 2&3	Fund 4	Fund 6	Total
Opening	(168.2)	(68.3)	(94.1)	(100.6)	**(431.2)**
Acquired during the period					**0.0**
Called during the period	-	(30.1)	(38.6)	(11.8)	**(80.5)**
Distributed during the period	36.2	27.0	1.9	0.2	**65.3**
Accumulated preferred return and special distribution (shown as movement in equity)	32.1	(9.0)	-	-	**23.1**
Accumulated during the period	(47.6)	-	45.7	(5.3)	**(7.2)**
Closing	**(147.5)**	**(80.4)**	**(85.1)**	**(117.5)**	**(430.5)**
Capital remaining available to be called (NCI & parent interest)	6.6	70.5	504.2	126.7	708.0
Remaining number of cases (NCI & parent interest)	22	29	16	187	254
Remaining EPV (NCI & parent interest)	2,065.4	4,131.6	4,581.0	3,178.8	13,956.8
Distribution history					
2H17	-	-	-	-	-
1H18	-	-	-	-	-
2H18	4.3	-	-	-	4.3
1H19	5.1	-	-	-	5.1
2H19	13.3	4.0	-	-	17.3
1H20	37.8	-	3.3	-	41.1
2H20	20.0	10.6	-	-	30.6
1H21	10.9	26.5	1.9	0.2	39.5
2H21	25.3	0.5	-	-	25.8
Total distributions	**116.7**	**41.6**	**5.2**	**0.2**	**163.7**

- First generation funds remain within the 100% proceeds and profit distribution to NCI stage of the distribution waterfall
- First generation funds have cash distributions still to be paid to NCI in respect of the result
- Fund 4 and Fund 6 have retained and recycled proceeds into investments during the period

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Westgem and Fund 4 Impairments

Two key investments have been impaired to comply with accounting standards, even though the legal processes (via appeals) continue.

As both investments have positive prospects of success on appeal, commercially these investments are retained in full in our analysis of EPV.

There is no cash impact in this period.

Westgem (EPV $250.0m)

- Investment of $58.1 million has been impaired to zero, with a net (after insurance cover) provision of $8.7 million raised for potential adverse cost exposure.
- Senior counsel advise that the merits of the appeal are positive. The appeal is likely to be heard in FY22; with investment completion in FY23.
- If appeals succeed, the impairment, adverse cost provisioning and P&L impact will be reversed in whole or in part, depending on the final decision.
- The only future cash impact will be for the uninsured portion adverse cost exposure which is estimated to be $8.7 million plus the costs and adverse costs of the appeal if the appeal fails.

Fund 4 Investment (EPV undisclosed)

- Investment of $54.8 million has been impaired. There is no adverse cost exposure.
- Legal advice on prospects of the appeal is positive. The appeal is likely to be heard in FY22-23; with investment completion in FY24.
- If appeal succeeds, the impairment and P&L impact will be reversed.
- There is no future cash impact if the appeal fails.

OMNI BRIDGEWAY

Regulatory reforms

- Continued push for regulatory reform for litigation finance industry in Australia, Europe and US
- We have consistently been and will continue to be an advocate for fit for purpose regulation of the industry

US

- Rule change in New Jersey to require disclosure of third party funding (**TPF**)
- No other material changes anticipated

Europe

- Proposal for changes to UNCITRAL ICSID arbitration process for arbitration against sovereign States
- Changes intend to curtail funding for claimants against sovereigns
- Significant resistance to proposed changes, favoured by States that have been impacted by funded claims
- EU Parliament has received report to require disclosure of TPF and propose cap on fees (similar to Australia class actions)
- EU Parliament makes recommendations to EU Commission, and remote possibility this will proceed any further

Australia

- Continuous disclosure laws approved by the Senate anticipated to have no material impact
- Senate Economics References Committee hearings exposed the false bases upon which changes were proposed
- Treasury and AG considering other recommendations from Parliamentary Joint Committee
- Submissions made on proposed minimum return to group members of 70%, most of which oppose proposal
- Unlikely to be considered before next Federal election, and if considered unlikely to be approved
- If approved, modify our approach to focus on large class actions where economics work better or launch/acquire law firm

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Risk mitigation

Risk	Potential impact	Strategic response
POOR INVESTMENT DECISIONS	Financial impact of loss of investment, and in relevant jurisdiction adverse cost exposure, with flow on reputation risk	• Investment in experienced investment managers with litigation experience • Enhanced Investment Committee process with introduction of external resources from the judiciary and legal profession
COMPETITION	Price compression Loss of market share Talent loss	• Market differentiation (track record, capital adequacy, ACO cover, security for costs, transparency through public listing, reputation for integrity and fairness, strategic insights & project management on cases) • Innovation - products & services • Know-how - business processes • Talent retention strategies • Taking steps to reduce cost and increase availability of capital
REGULATORY CHANGE	Need to adjust business model New reporting /licensing regime New market entrants	• Awareness, involvement and industry leadership
IT & DATA SECURITY	Loss of data due to software or hardware failure Theft or corruption of data or trade secrets due to social engineering or external penetration ('hacking')	• Continuous adaptation to be nimble • Audits by external security and IT providers • Staff education • Constant vigilance
BRAND REPUTATION	If reputation is sullied, stakeholder trust and loyalty is eroded and brand equity and financial value can be compromised	• Conscious culture of risk management • Numerous policies and practices to safe- guard reputation including escalation procedures throughout our organisation and regular and clear communication with all stakeholders
PORTFOLIO CONCENTRATION	Potential for a funded case to be lost = Omni Bridgeway investment lost and exposure to adverse costs	• Deliberate transition from idiosyncratic risk to systemic risk of a portfolio • Portfolio represents increased number of investments, broader range of case types, sizes and jurisdictions • ACO insurance cover in place
KEY-PERSON DEPENDENCY	Loss of know-how	• Legal avenues: non-compete, confidentiality and IP protection agreements • Talent retention & knowledge transfer strategies: coaching, mentoring, professional development to build, transfer and safe-guard corporate knowledge • Incentive plans which reward loyalty and engagement • Purchase agreement structured to retain key executives

The above is not intended to be an exhaustive list of all the risks faced by the business.

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Glossary of terms and notes

EPV	Estimated portfolio value for an investment where the funding entity earns: (i) a percentage of the resolution proceeds as a funding commission, is OBL's current estimate of the investment's recoverable amount after considering the perceived capacity of the defendant to meet the claim and any other pertinent factors. Such amount is not necessarily the amount being claimed by the claimants, nor is it an estimate of the return to OBL if the investment is successful, (ii) a funding commission calculated as a multiple of capital invested shall be calculated by taking OBL's estimate of the potential income return from the investment and grossing this up to an EPV using OBL's LTCR, and (iii) a funding commission calculated on a combination of the above bases or on an alternative basis may utilise one of the above methodologies, or a hybrid construct, or an alternative methodology depending upon the components of the funding commission. OBE Group's EPV has been estimated on a conceptually consistent basis; enforcement case investments may have a multi-layered approach from a timing and value perspective. Where OBE Group have not yet been able to ascertain an EPV consistent with the disclosed methodology an EPV of zero has been used. However calculated, an EPV is an estimate and is subject to change over time for a number of reasons, including, but not limited to, changes in circumstances and knowledge relating to an investment or the defendant(s)' perceived capacity to meet the claim, partial recovery and, where applicable, fluctuations in exchange rates between the applicable local currency and the Australian dollar. Possible EPVs are reviewed and updated where necessary. The portfolio's value is the aggregation of individual investments' EPVs as determined above.
IEV	Implied embedded value shows the future income which may be generated from the investment portfolio if the historic long term conversion rate (LTCR) of 15% (the ratio of EPV to gross income) is applied to the portfolio EPV. LTCR includes lost investments. The IEV is a portfolio level concept, which is calculated prior to the disaggregation of external fund investors' entitlements through each of the Fund's return structures. This is a not a forecast or estimate of future earnings to OBL.
LTCR	Long term conversion rate. Past performance indicates that the Group's litigation funding investments (excluding OBE Group investments) have generated average gross income of approximately 15% of the EPV of an investment at the time of completion. Past performance is not necessarily an indication of future performance.
LTIP	Long Term Incentive Program
NCI	Non-controlling interest
OBE GROUP	Omni Bridgeway Holding B.V. (ie 'Omni Bridgeway Europe'), Omni Bridgeway AG (formerly ROLAND ProzessFinanz), and a joint venture with IFC (part of the World Bank Group).
PAST PERFORMANCE	Past performance is <u>not necessarily an indication</u> of future performance. Past performance indicates that Omni Bridgeway's litigation funding investments (excluding Omni Bridgeway Europe's investments) have generated average gross income of approximately 15% of the EPV of an investment at the time it is completed (LTCR). The LTCR, ROIC and IRR from completed investments may vary materially over time. By providing this information, Omni Bridgeway has not been and is not now, in any way, providing earnings guidance for future periods.
POSSIBLE COMPLETION PERIODS	The possible completion period is Omni Bridgeway's current estimate of the period in which an investment may be finalised. It is <u>not</u> a projection or forecast. An investment may finalise earlier or later than the identified period for various reasons. Completion for these purposes means finalisation of the litigation by either settlement, judgement or arbitrator determination, for or against the funded claimant, notwithstanding that such finalisation may be conditional upon certain matters such as court approval in the context of a class action. It may not follow that the financial result will be accounted for in the year of finalisation. Possible completion period estimates are reviewed and updated where necessary.
PPA	Purchase price allocation
ROIC	Return on invested capital; gain or loss on derecognition of investments (including or excluding overheads) divided by the total spent on investments (including or excluding overheads)
STIP	Short Term Incentive Program

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- The material in this presentation has been prepared by Omni Bridgeway (OBL) and is general background information about Omni Bridgeway's activities. The information is given in summary form and does not purport to be complete.
- A number of terms used in this presentation including: ROIC, EPV, IEV, net cash generation, operational cash expenditure, success rate on dollar weighted average, IRR and actual and budgeted commitments are categorised as non-IFRS information prepared in accordance with ASIC Regulatory Guidance 230 – Disclosing non-IFRS financial information, issued in December 2011. This information has not been audited or reviewed by EY unless expressly stated. For further commentary and analysis refer to Omni Bridgeway's 2021 Annual Report.
- This presentation contains certain forward-looking statements that can generally be identified using forward looking words such as, "expect", "anticipate", "likely", "intend", "should", "could", "may", "predict", "plan", "propose", "will", "believe", "forecast", "estimate", "target" and other similar expressions. Estimates of, indications of, and guidance or outlook on, future earnings or financial position or performance are also forward looking statements. Forward looking statement involve risks and uncertainties. Forward looking statements are provided as a general guide only and should not be relied upon as an indication or guarantee or future performance. Forward looking statements involve known and unknown risks, uncertainties, assumptions, and contingencies which are subject to change without notice, as are statements about market and industry trends which are based on interpretations of current market conditions. Actual results, performance or achievements may vary materially from any forward looking statements and the assumptions on which statements are based. Except as required by law or regulation, OBL disclaims all obligations to update publicly any forward looking statements, whether as a result of new information, future events, or results or otherwise.
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This is presentation is authorised for release to the market by the Disclosure Committee.

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