

Company presentation, May 2018

DATAGROUP SE

We manage IT



DATAGROUP is one of the leading IT service providers in Germany*



- **Our vision: We are the agile IT service provider with the highest customer satisfaction.**
- **We will become market leader with CORBOX as outsourcer and cloud-provider for companies with EUR m 100 – 5,000 annual revenues.**
- **The most recent figures show that we are on good track.**

More than 2,000 employees exclusively in Germany

What exactly are IT services? Our customer CHRIST serves as an example



CHRIST
Juweliere und Uhrmacher seit 1863

- CHRIST Juweliere und Uhrmacher seit 1863 (jewellery and watches since 1863) located in Hagen is the no. 1 jewellery retailer in Germany.
- CHRIST operates more than 220 specialist shops with more than 2,400 employees in Germany and Austria as well as a webshop.
- Since 2016, DATAGROUP has been responsible for the IT infrastructure operations of CHRIST.

Examples: This is what we do for CHRIST

Data Center Services

- Operation, monitoring, maintenance and backup of some 90 servers
- Flexible upscaling of computing capacity, e.g. during pre-Christmas business
- Active Directory for 3,600 IT users

SAP Services

- Operation of the complete SAP landscape in our data center
- Revisions-safe archiving in perpetuity
- Bugfixing and changes for all SAP applications

Communication & Collaboration Services

- Provision of more than 1,200 email boxes
- Operation of Microsoft SharePoint as a centralised collaboration platform for more than 500 users, e.g. for projects

We provide all of these and many other services on the basis of our IT full outsourcing offer **CORBOX**.

CORBOX: Our full service offer for companies

Data Center Services	Network Services	End User Services
Application Mgmt. Services	SAP Services	Printing Services
Communication + Collaboration Services	Big Data Services	Service Desk
Security Services	Monitoring Services	Continuity Services



- CORBOX = modular integrated solution for carefree IT operations
- Service provision: industrially manufactured and reproducible in high quality
- CORBOX is the “Cloud Enabling Platform”

IT services are a subscription business: This means stable, recurring income

Life cycle of IT service customers

One-off project revenues

**36 – 60 months of recurring income,
average term ca. 48 months**

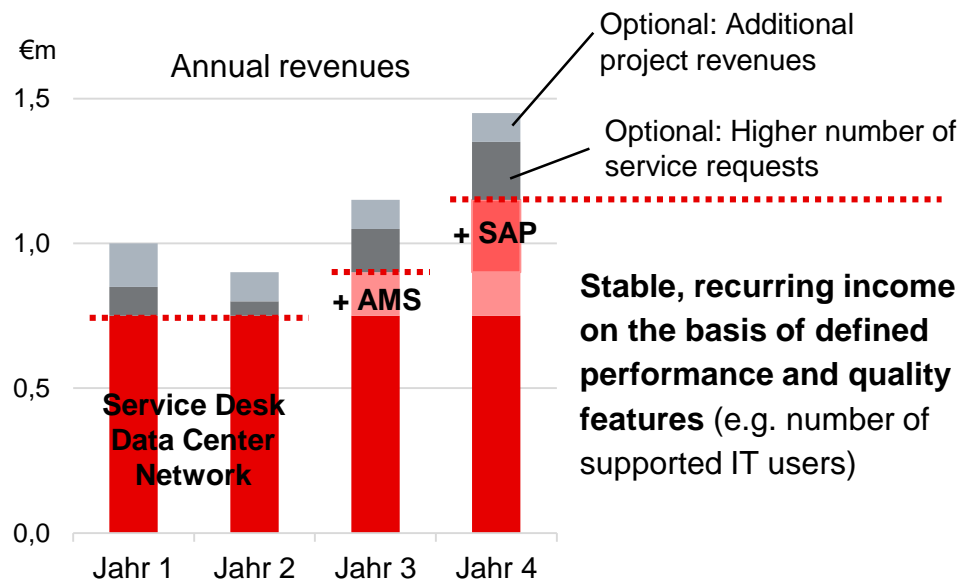
At least one contract extension

Transitions-phase

Duration: 3 - 9 months depending on services' scope and complexity

Amount: ca. 25% of annual revenue

Operating phase 1 (example)

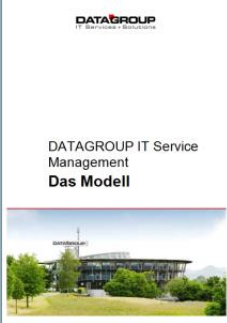




Operating phases 2 - X

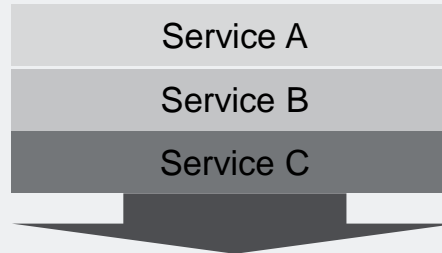
Contracts are generally extended at least once, mostly twice because of high switching costs.

Actual average term = 10 years

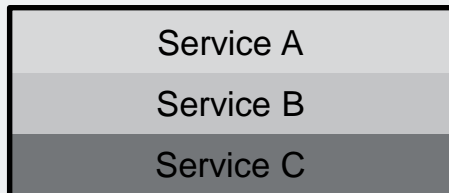
Basis for CORBOX is standardisation,...

	<p>Model = Plant's manual. Describes the provision of services according to industrial standards on the basis of defined roles, processes and procedures</p>		<p>Service catalogue. Describes the plant's standardised services = Services</p>	
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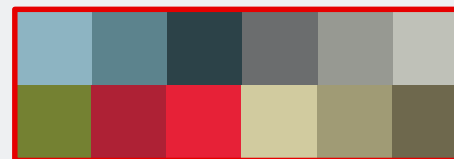
Standardised services



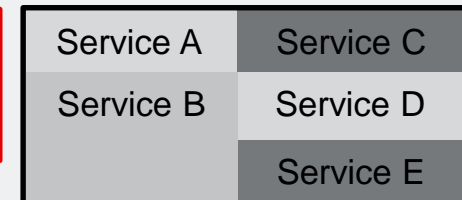
Standard products e.g. IT flat rate



CORBOX



A customer's individual needs



... data centers in Germany...



DATAGROUP operates data centers in colocation facilities in Germany.

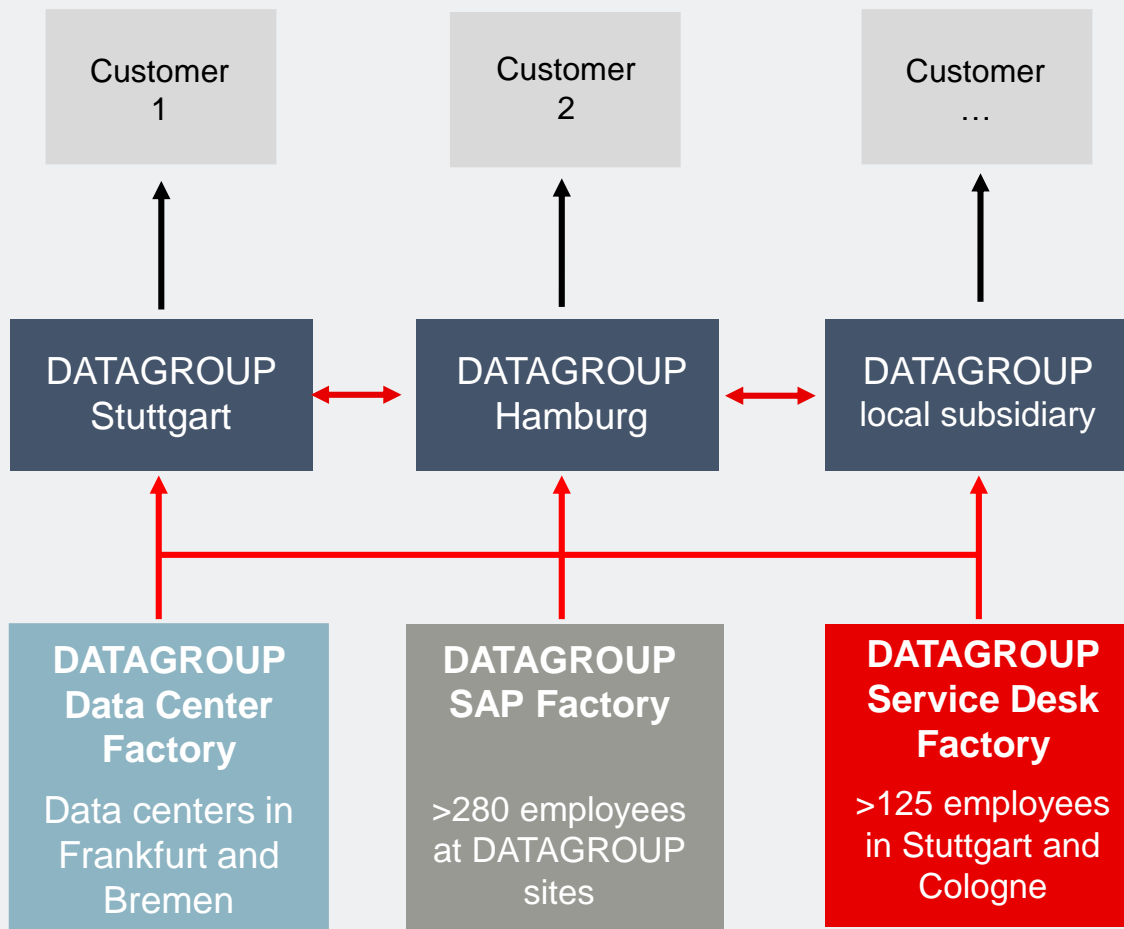
Colocation = Renting secured, electrified and cooled spaces, in which our computers and storage media are installed



That means:

- Capex only for IT infrastructure
- Maximum security
- Perfect connectivity / Geo redundancy
- Highest flexibility, virtually scalable at will and without fixed expenses

... and an optimal combination of local and central production.



- The virtual centralisation of service desk and data centers brings **efficiency gains** and **quality advantages**, e.g.:
 - Holiday and illness cover
 - 24/7 service is made easier
 - Larger machines: Use of manpower grows disproportionately lower than outcome
- The SAP factory allows us to bundle knowledge in a very efficient way.
- Local sales and production locations continue to guarantee proximity to the customer and contact at eye level!

DATAGROUP as Cloud Enabler



Data Center performance on premise

CORBOX Private Cloud



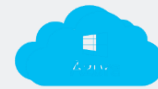
Data Center Services	Network Services	End User Services
Application Mgmt Services	SAP Services	Printing Services
Communication + Collaboration Services	Big Data Services	Service Desk
Security Services	Monitoring Services	Continuity Services

Performances of DATAGROUP Data Center

DATAGROUP Hybrid Cloud



Data Center Services	Network Services	End User Services
Application Mgmt Services	SAP Services	Printing Services
Communication + Collaboration Services	Big Data Services	Service Desk
Security Services	Monitoring Services	Continuity Services



DATAGROUP Data Center plus Public Cloud offerings

DATAGROUP Public Cloud Services



Performances of Public Cloud plus DATAGROUP Service Mgmt

Custom-fit solutions for different customer requirements

Why DATAGROUP Hybrid Cloud?

- We orchestrate complex multi-cloud scenarios and serve as single point of contact to our customers.
- We take the overall responsibility – simple and understandable SLAs also for hybrid service products.
- We offer scalable capacity “on demand” where needed.
- We have an excellent toolbox for hybrid clouds in place.
- We operate the hybrid cloud for already 10,000 users today.

Strong order intake with CORBOX among new and existing customers



Administration

Service Desk, End User Services

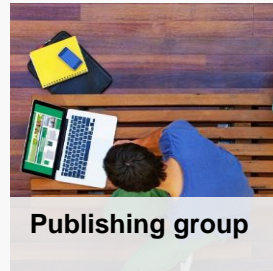
4 years
EUR 10.5



Industry

Full Outsourcing

3 years
EUR 2.6m



Publishing group

Full Outsourcing

5 years
EUR 2.3m



Aerotechnics

Service Desk, End User, Comm.+Coll.

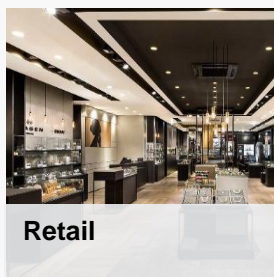
3 years
EUR 16.5m



Building industry

Full Outsourcing

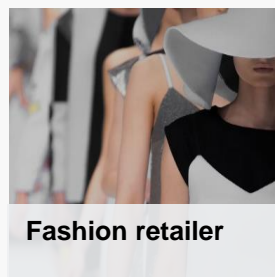
3 years
EUR 5.0m



Retail

Full Outsourcing

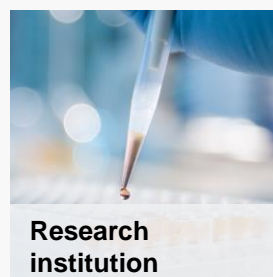
5 years
EUR 7.9m



Fashion retailer

Service Desk, Comm.+Coll., Data Center, Network

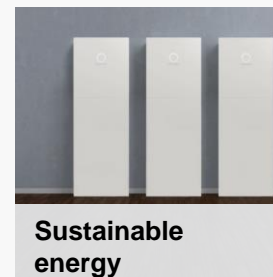
1 year, EUR 0.5m



Research institution

Full Outsourcing

5 years
EUR 6.7m



Sustainable energy

SAP Services

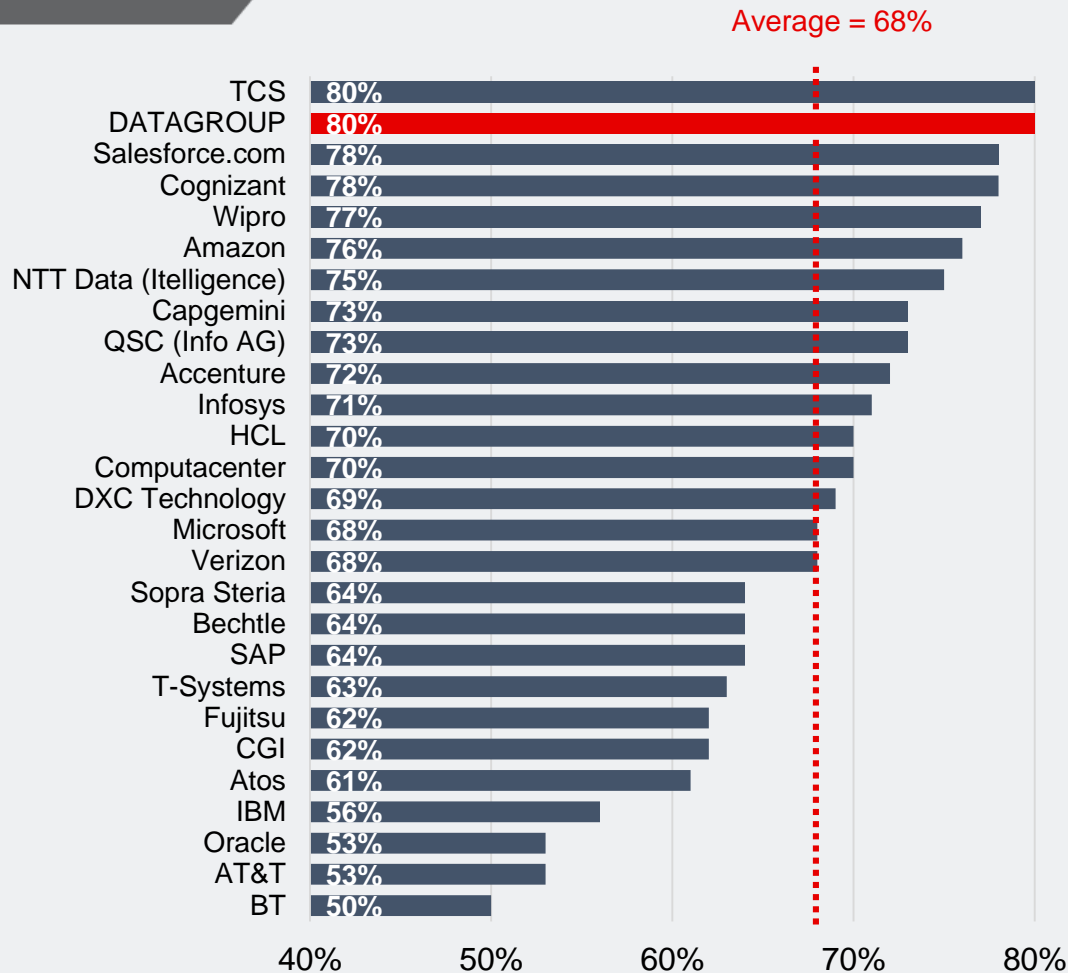
3 years
EUR 0.2m

... and many more!

Our customers (extract)



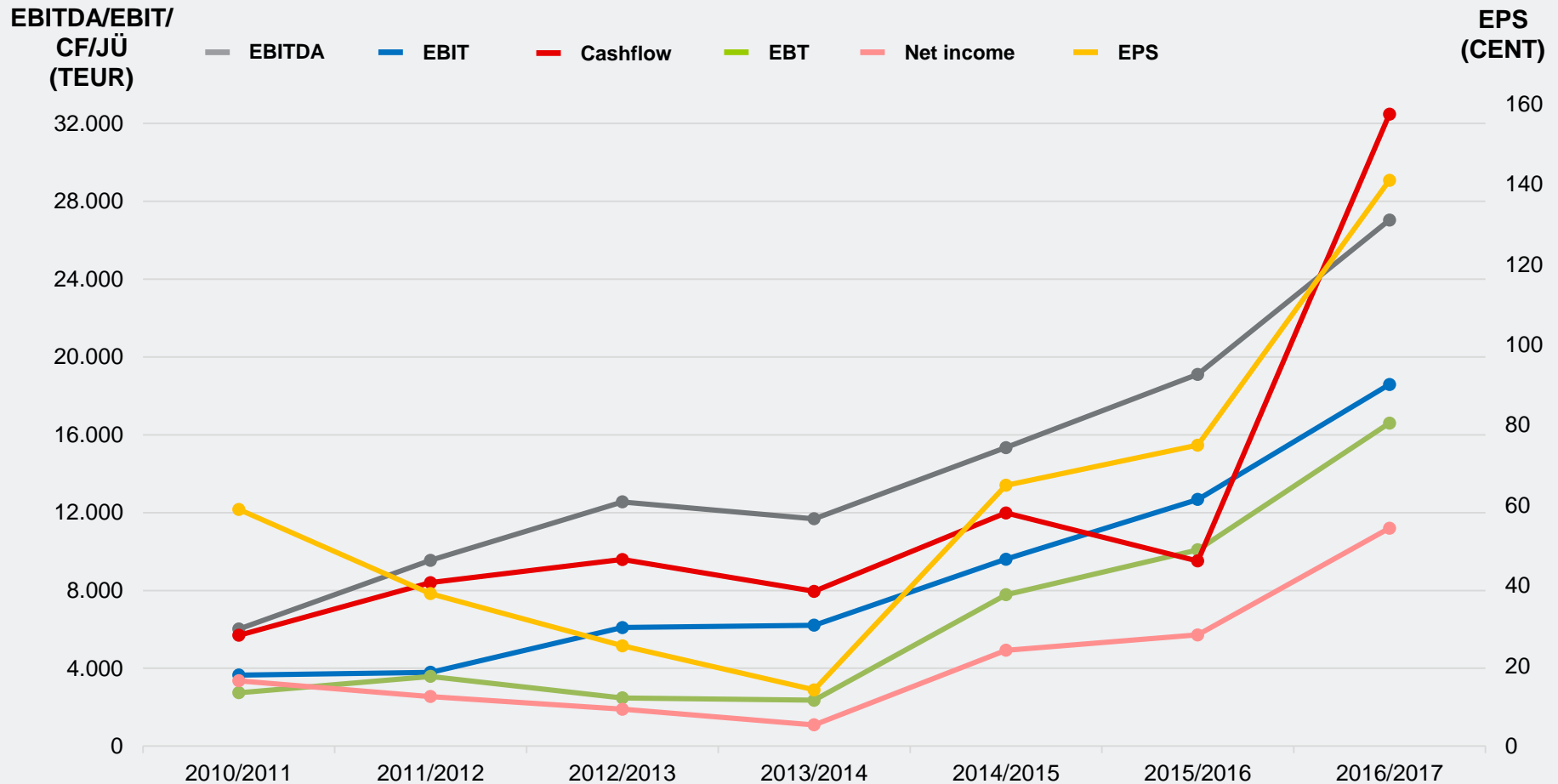
DATAGROUP is among the Top 3 in customer satisfaction in Germany



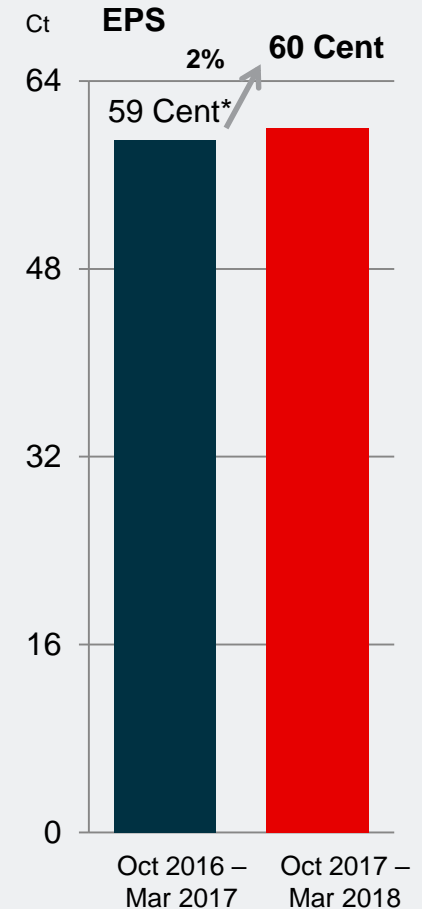
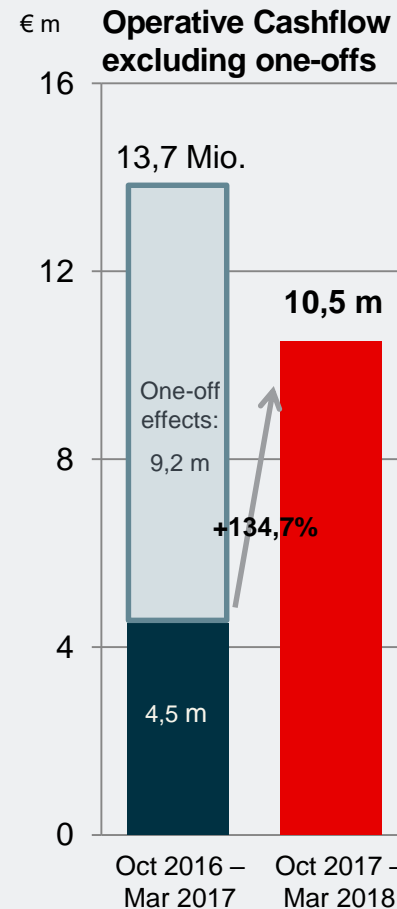
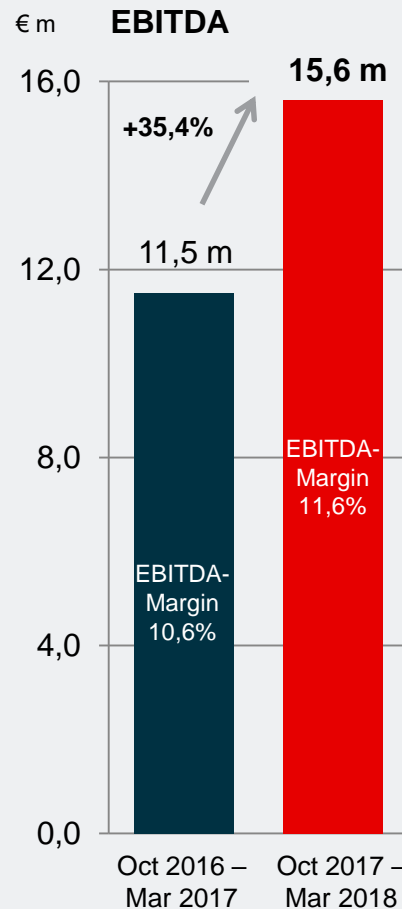
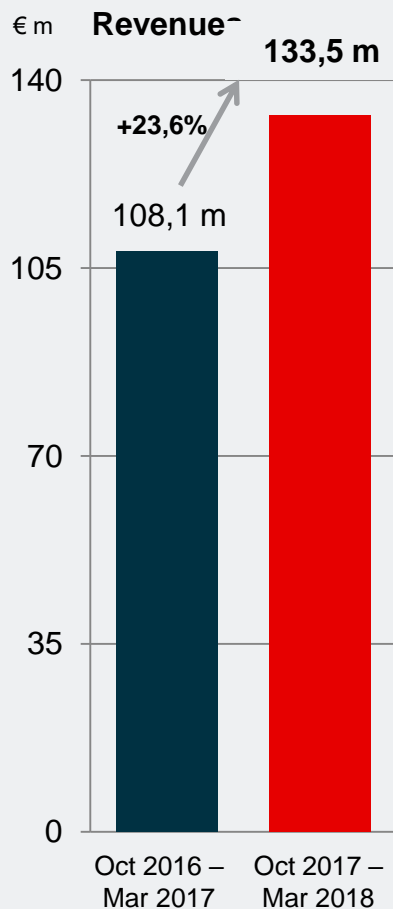
IT Outsourcing Study Germany/ Austria 2017 by Whitelane Research and Navisco

- Most extensive independent market study on this issue, covering 13 European countries
- 500 evaluated outsourcing contracts in Germany
- DATAGROUP maintained its second place among 27 leading outsourcing providers and improved one point in customer satisfaction
- DATAGROUP well exceeds the average in major categories, e.g.
 - Service Quality
 - Account Management Quality
 - Transformation Quality
 - Flexibility

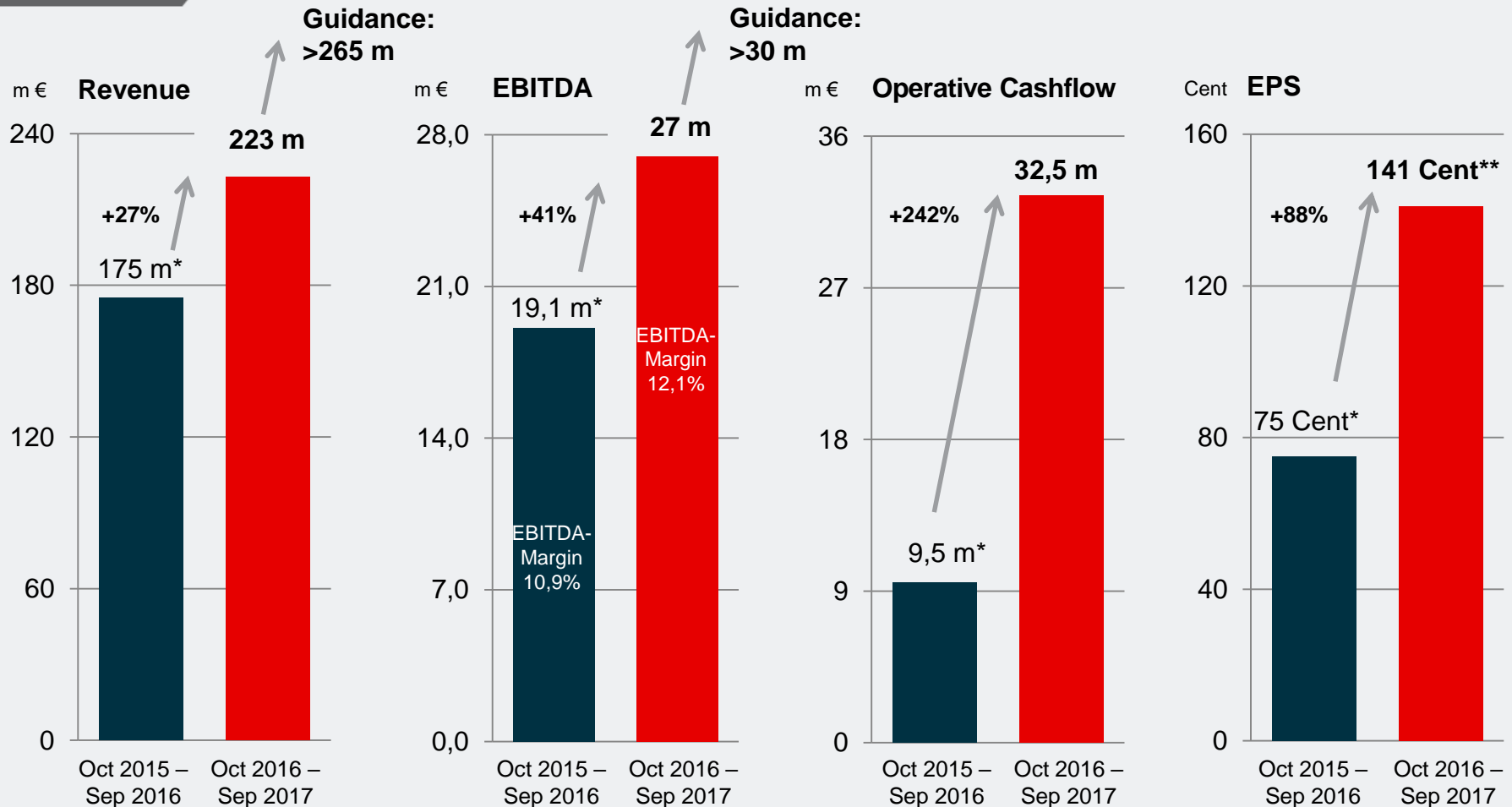
The figures speak for themselves – profitable and healthy growth



On this basis: Convincing performance in the first half year 2017/2018



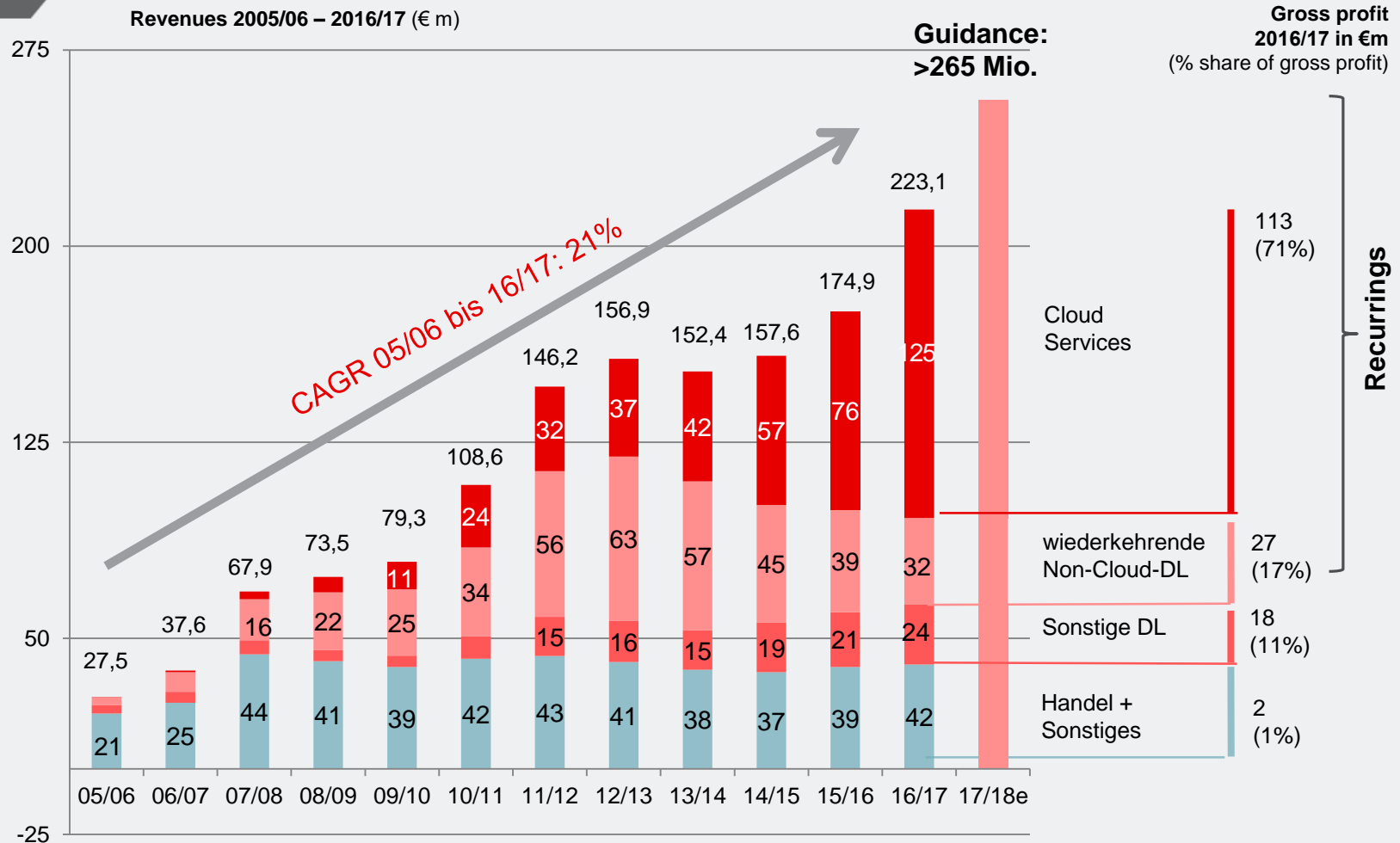
Strong growth and profit boost in fiscal year 2016/2017



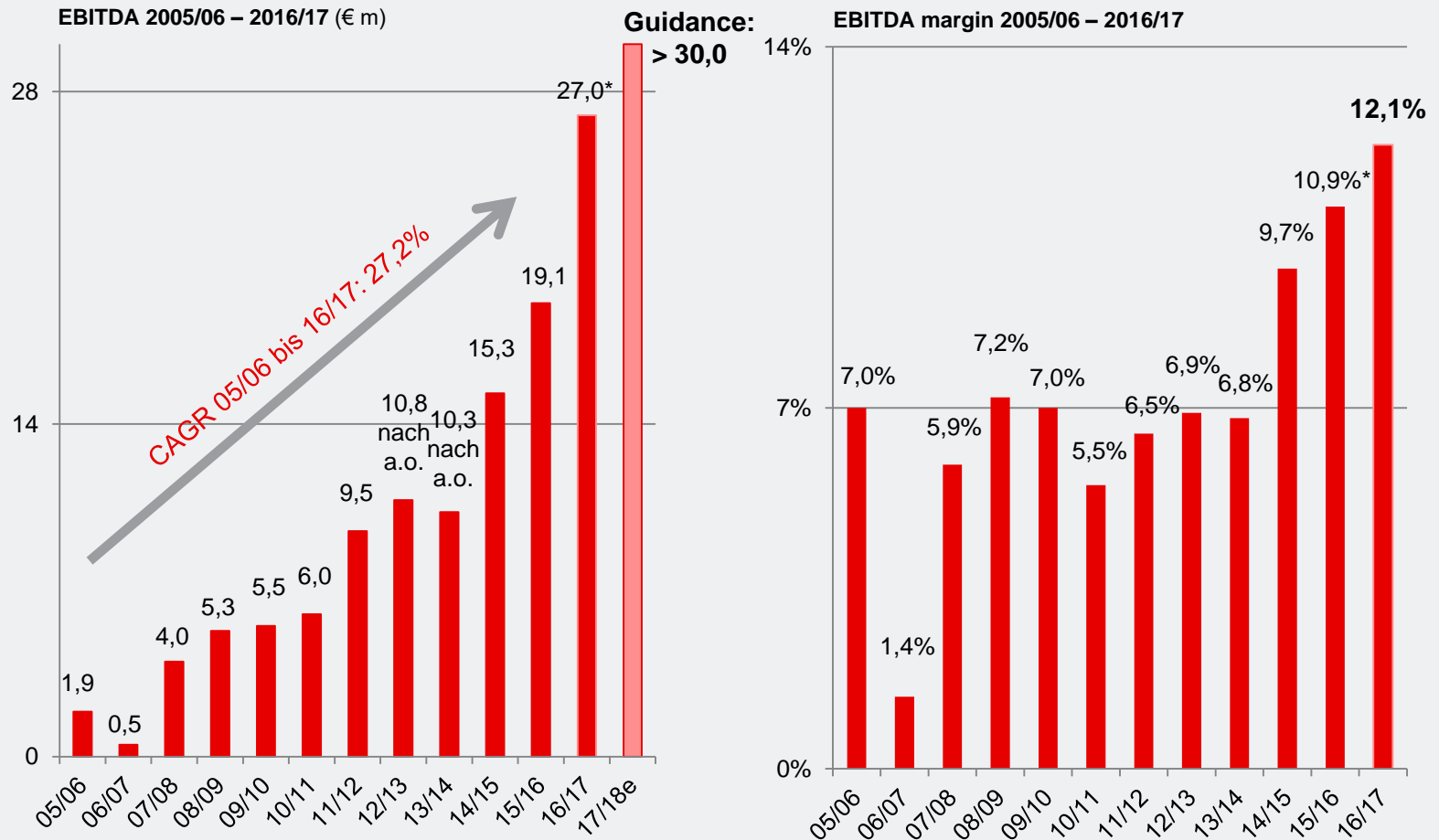
Selected key balance sheet figures

in TEUR	30/09/2017 audited	31/03/2017	31/03/2018
		unaudited	unaudited
Goodwill	39,630	38,523	46,409
Long-term financial liabilities	95,881	93,759	96,991
<i>thereof liabilities to financial institutions</i>	40,111	40,187	39,198
<i>thereof liabilities from finance leases</i>	3,601	4,793	2,884
<i>thereof pension provisions</i>	37,593	42,565	40,551
Short-term liabilities	57,928	41,301	57,023
<i>thereof liabilities to financial institutions</i>	7,874	7,744	918
Cash and cash equivalents	53,179	24,634	39,229
Accounts receivable	26,760	21,351	27,317
Accounts payable	4,454	2,902	6,533
Net financial debt (short and long term)	4,124	23,878	14,534
Equity ratio ¹⁾ (in %)	28.9	19.7	28.9
Return on equity ²⁾ (in %)	25.7	30.4	16.8
Balance sheet total	213,390	165,642	213,913

Strong growth in recurring revenues from high margin services

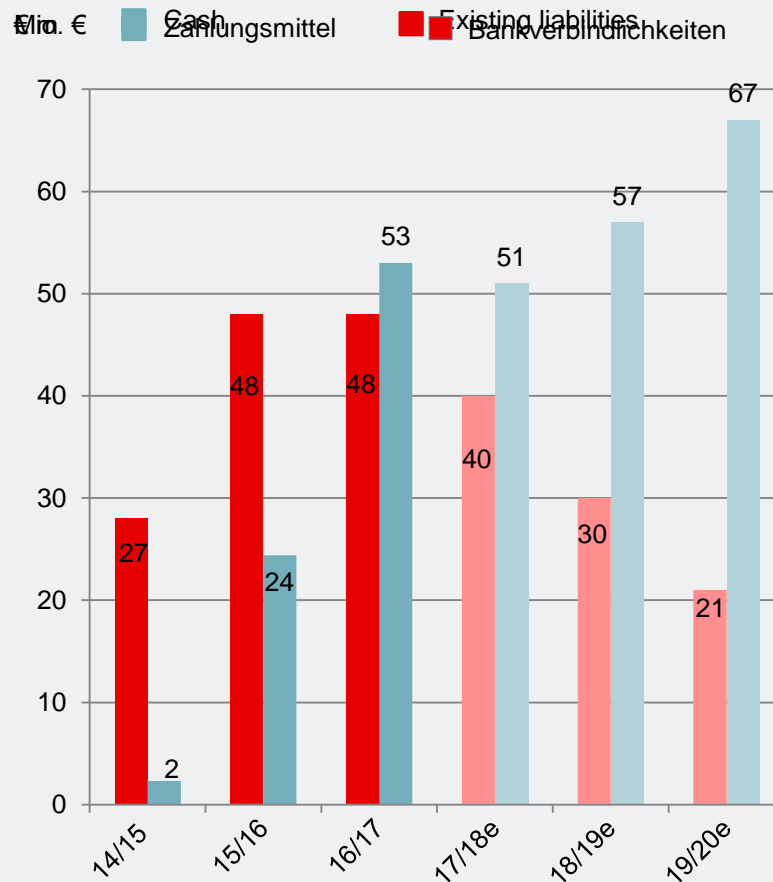


Result: Disproportionate rise in profitability and a sustainably higher profitability

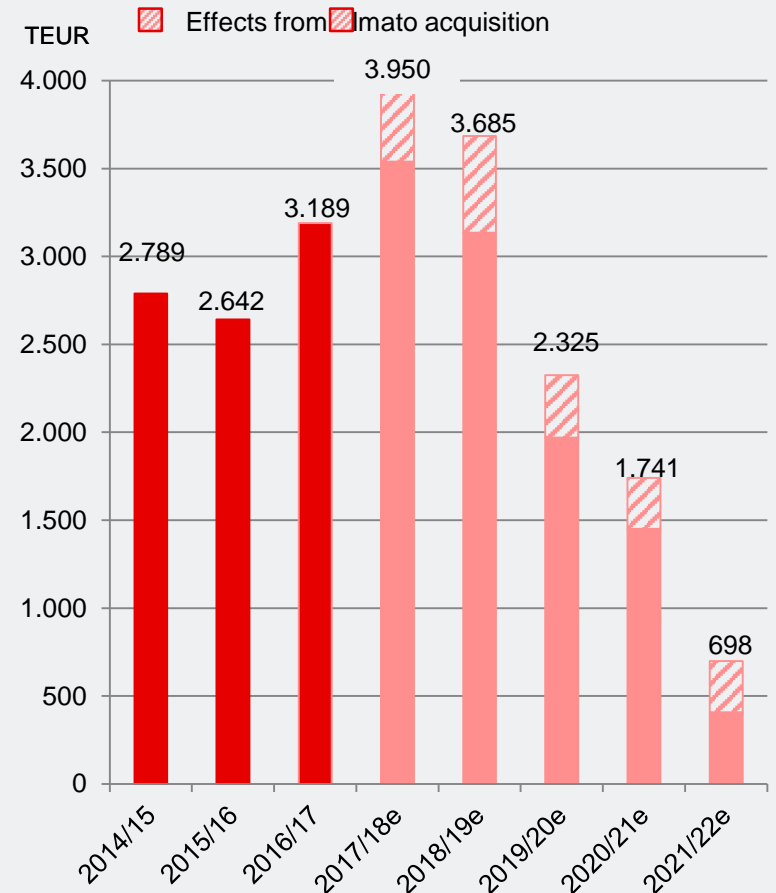


Developments in bank liabilities and amortisation from PPA well on track

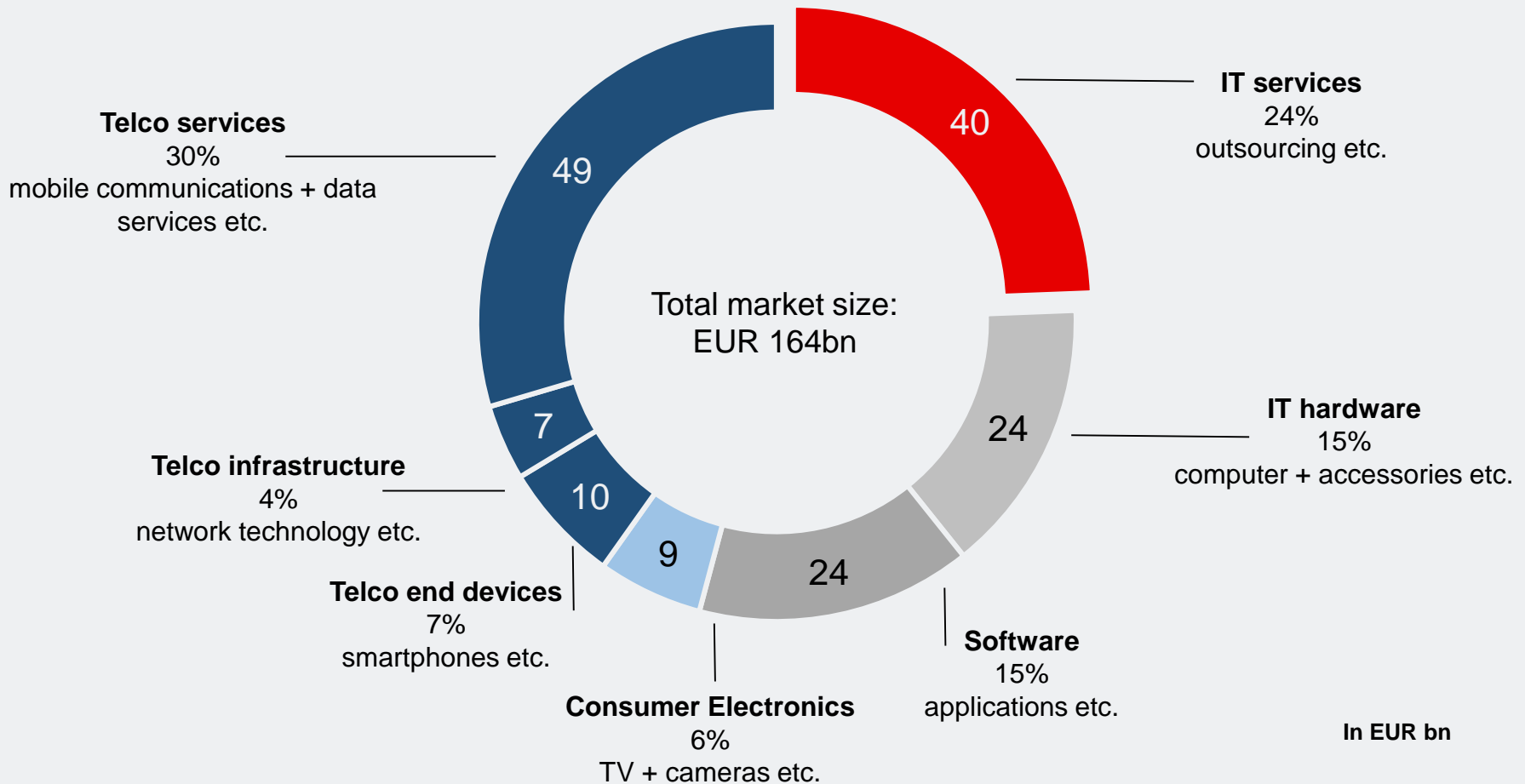
Development in bank liabilities (as at 30/09)



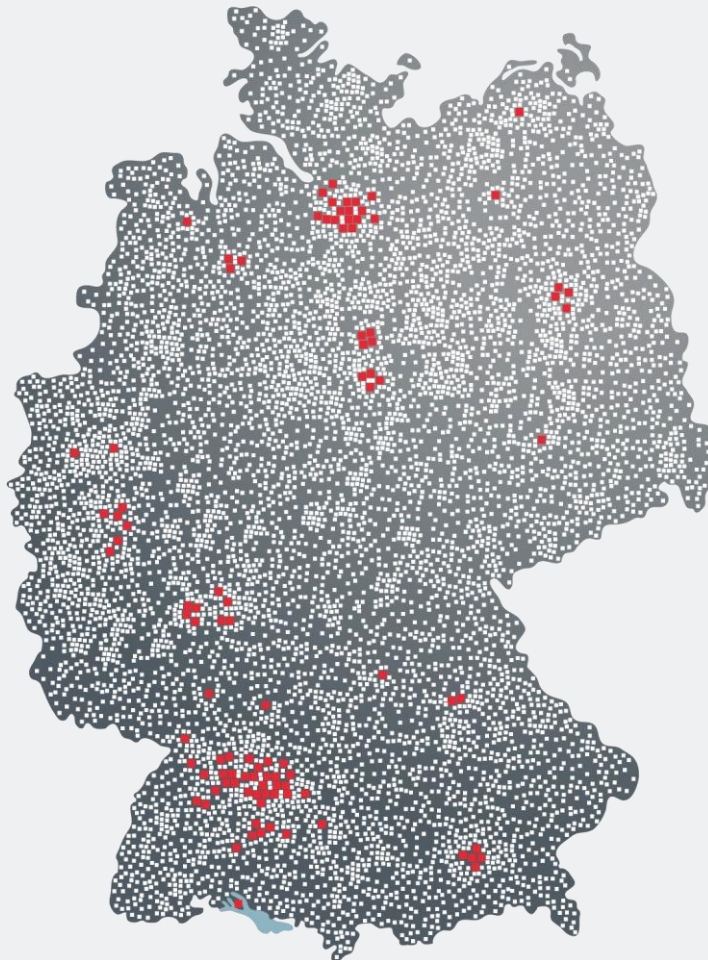
Development in amortisation from PPA (as at 30/09)



Growth strategy on the basis of the ICT market in Germany – IT Services Market only



Growth pillar 1: New customer acquisition in CORBOX target customer segment (EUR 100m – 5,000m revenues)



- c. 10,000 potential CORBOX customers – in 2020 we want to have about 230 of them
- 152 existing customers with EUR 100m – 5,000m revenues

FY 2017/2018, to date

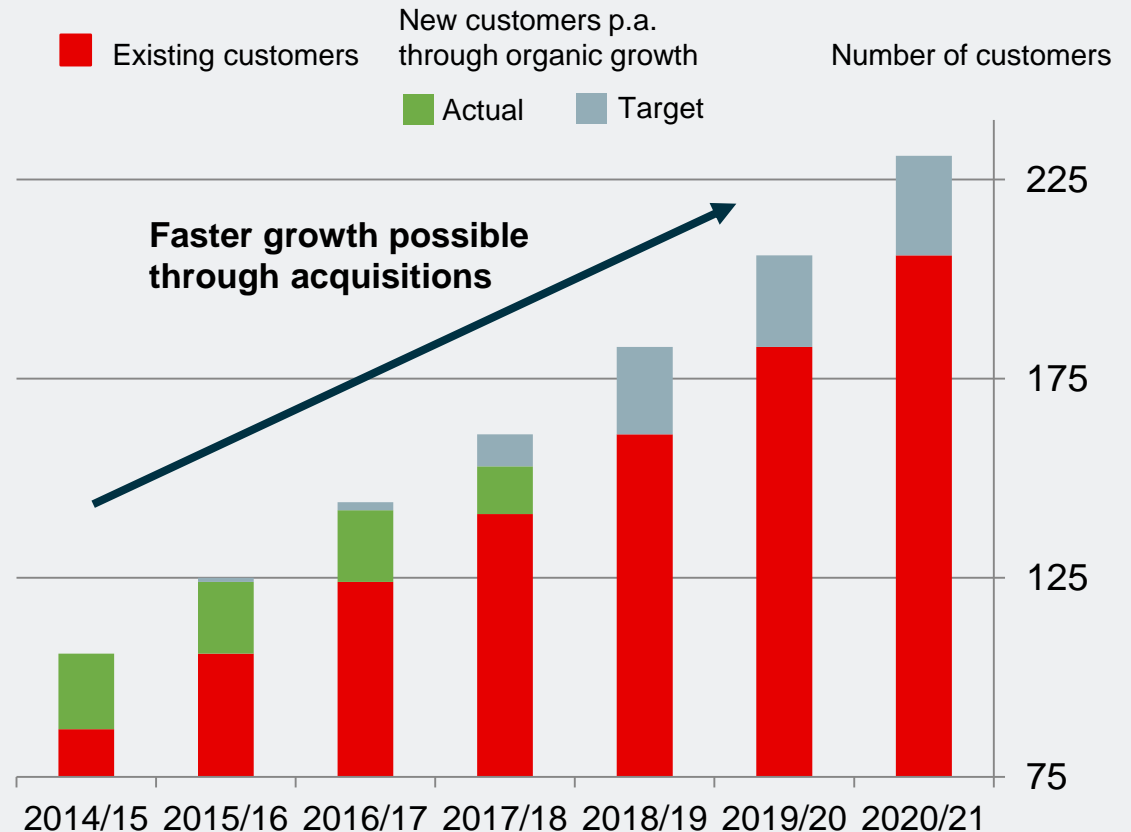
12 new CORBOX customers and 9 enhanced

The Almato transaction broadens our potential customer base for CORBOX.

Growth pillar 1: New customer acquisition in CORBOX target customer segment

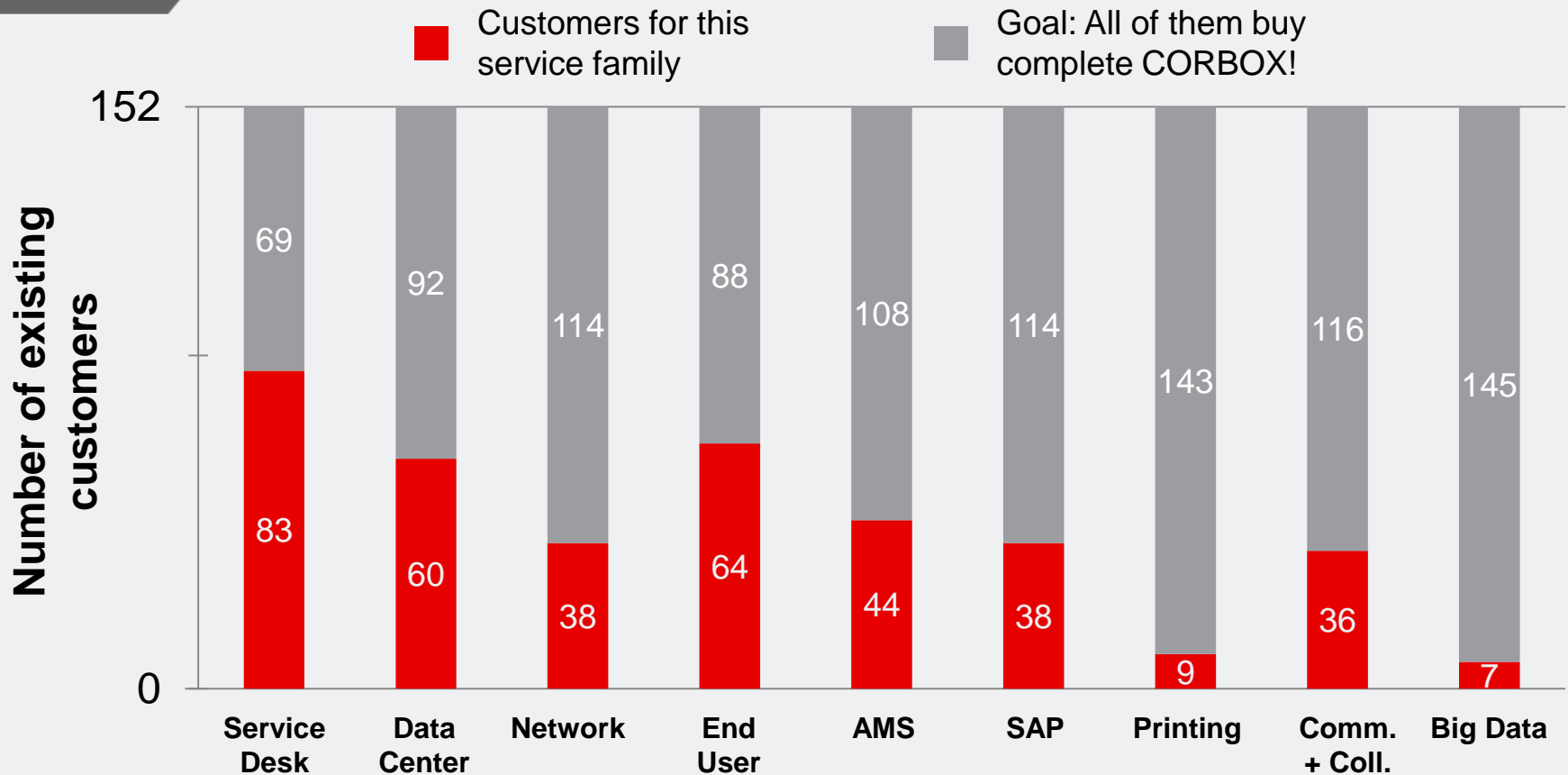
New customer acquisition with upward trend:

- By 2020/21 about 230 customers are realistic
- Acquisitions might speed up the process



Growth potential: to additional revenues of c. EUR 60m* p.a.

Growth pillar 2: Upselling to existing customers



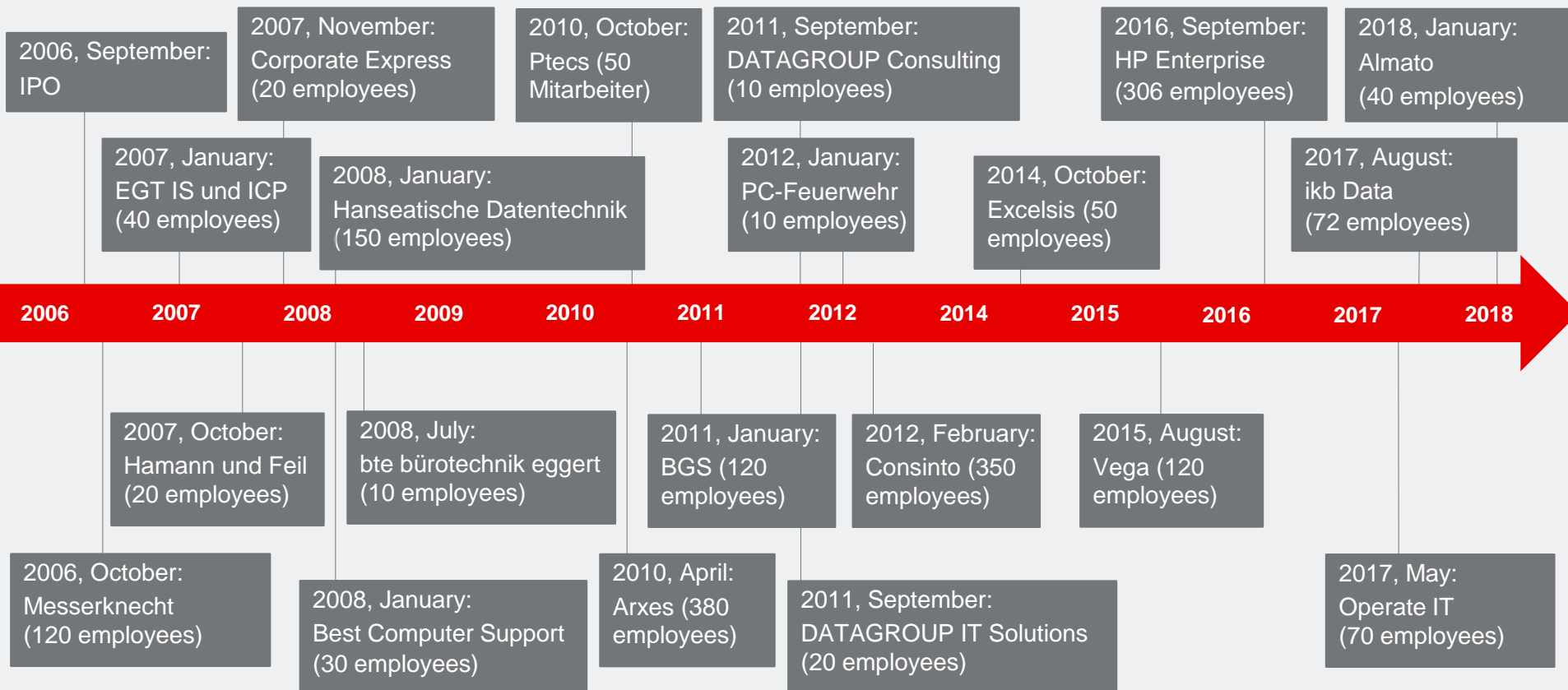
Growth potential until 2020: to c. EUR 25 – 50m p.a.

Growth pillar 3: Inorganic company growth

- 21 acquisitions since the IPO
- Current focus:
Corporate SAP consulting companies, data center providers and complementary horizontal specialist providers
- We are currently in discussions with several companies.
- Funds for further M&A activities available.

Growth pillar 3: Inorganic company growth

21 acquisitions since IPO



Our latest acquisition from 01/02/2018: Almato GmbH

- Almato is a specialist in automation and optimisation of business processes.
- 40 employees, about EUR 4m of revenues (2016), EBITDA margin in the double-digit range
- The know-how of Almato in the key technologies Robotic Process Automation (RPA) and Real-Time Interaction Management (RTIM) allows us in future:
 - To address a new growth market
 - Support our customers also in the automation of their business processes
 - Optimize the administration of our customers and our own thanks to increased efficiency, better service quality and improved customer satisfaction

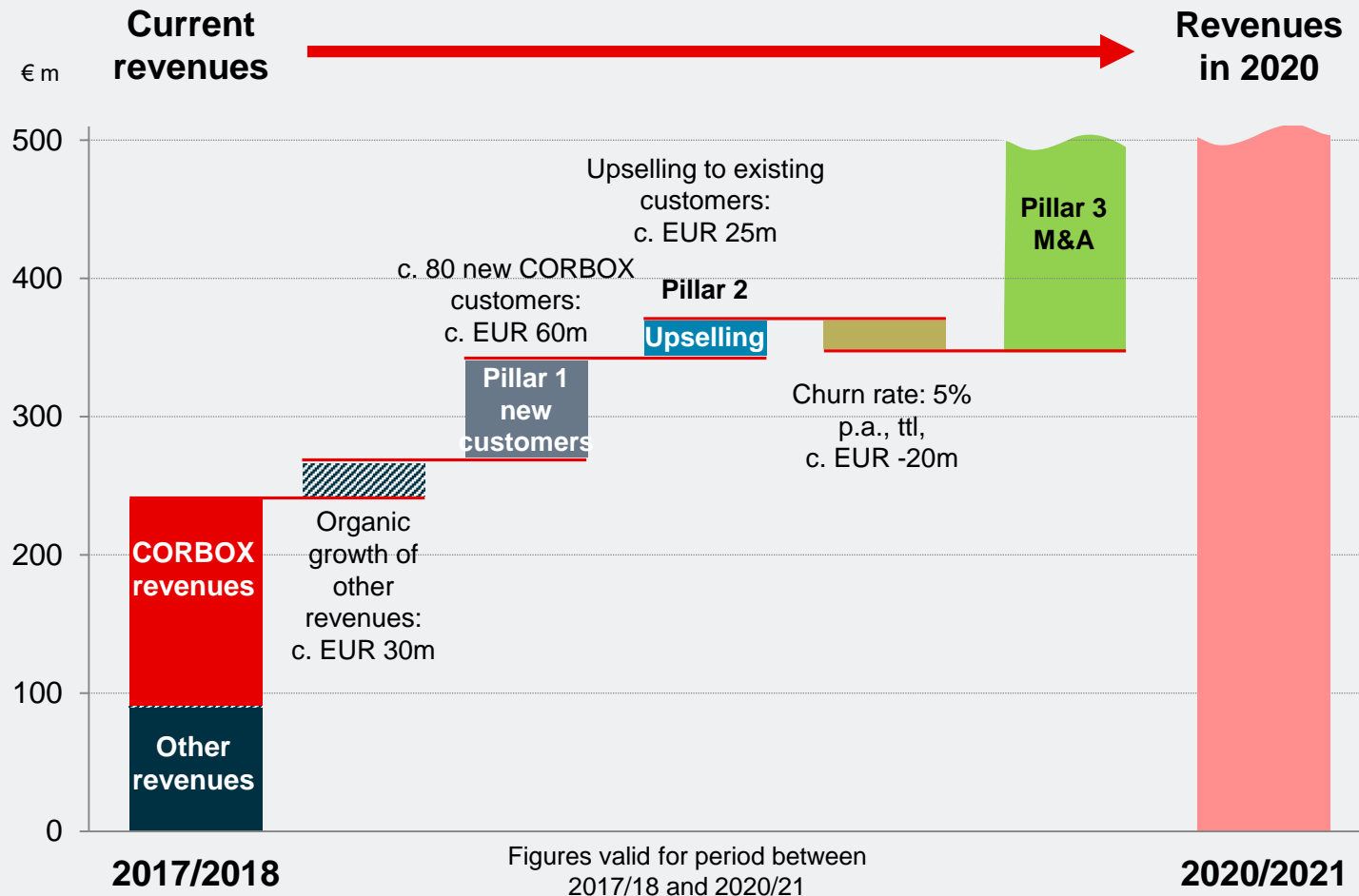


Conclusion: Strong growth with 3 pillars

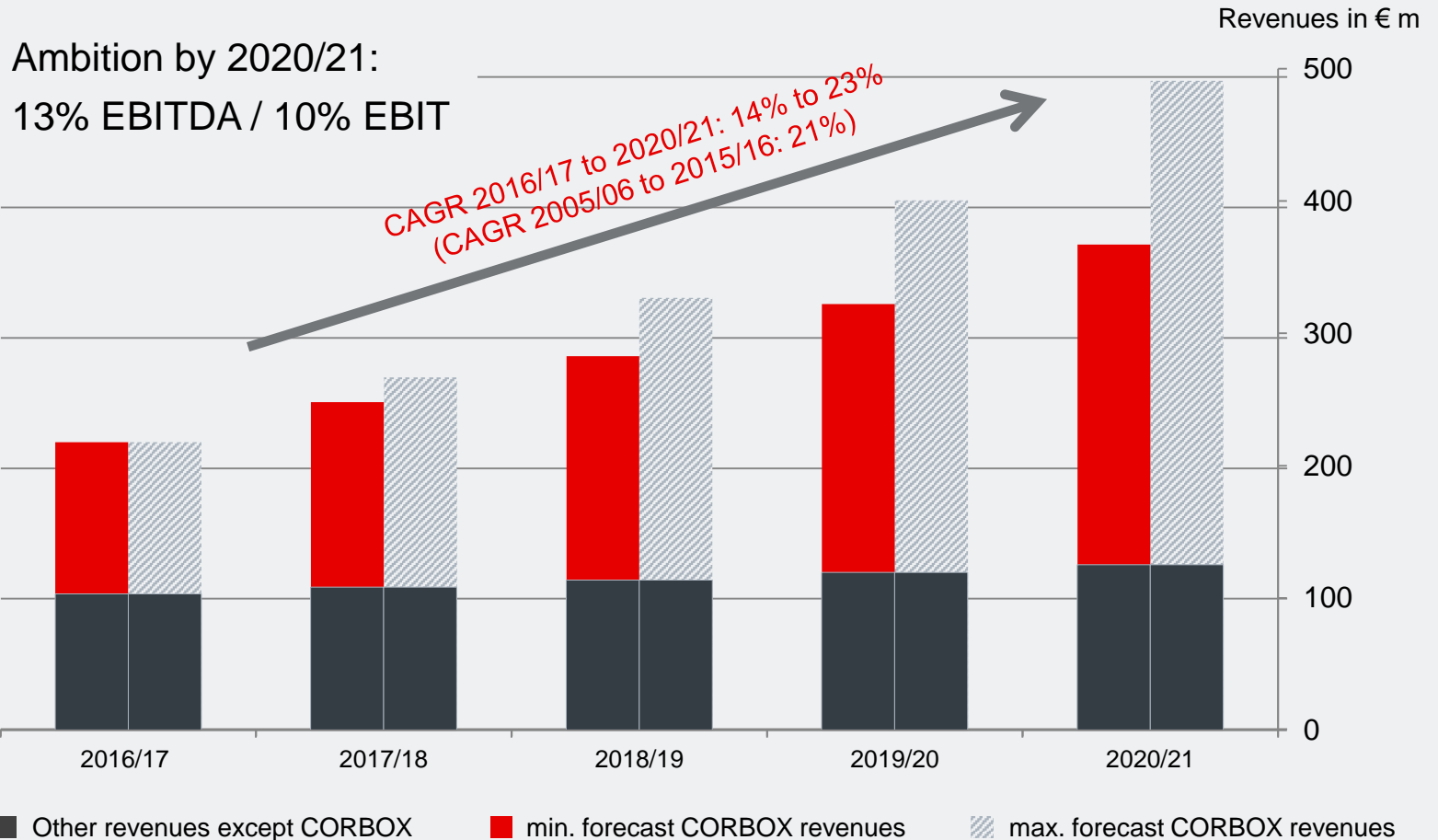


- 1. Organic growth** by acquisition of new outsourcing customers
- 2. Development of our existing customer base** towards full outsourcing customers
- 3. Inorganic growth** leads to revenues and additional customers, who can use CORBOX

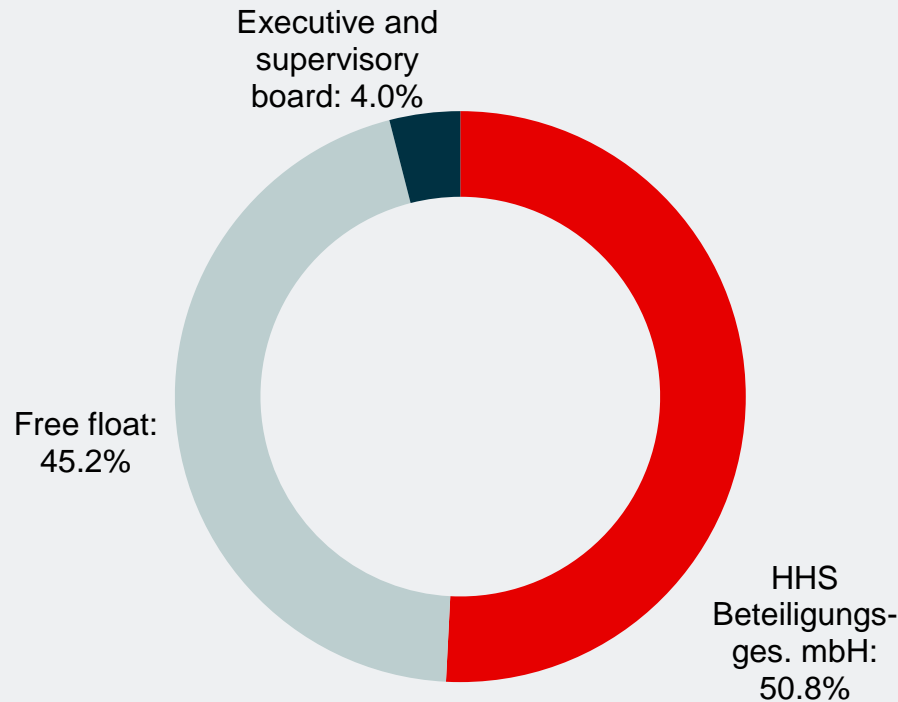
Conclusion: Possible growth scenario 2017/18 – 2020/21



Scenarios incl. acquisitions and upselling



Shareholder structure

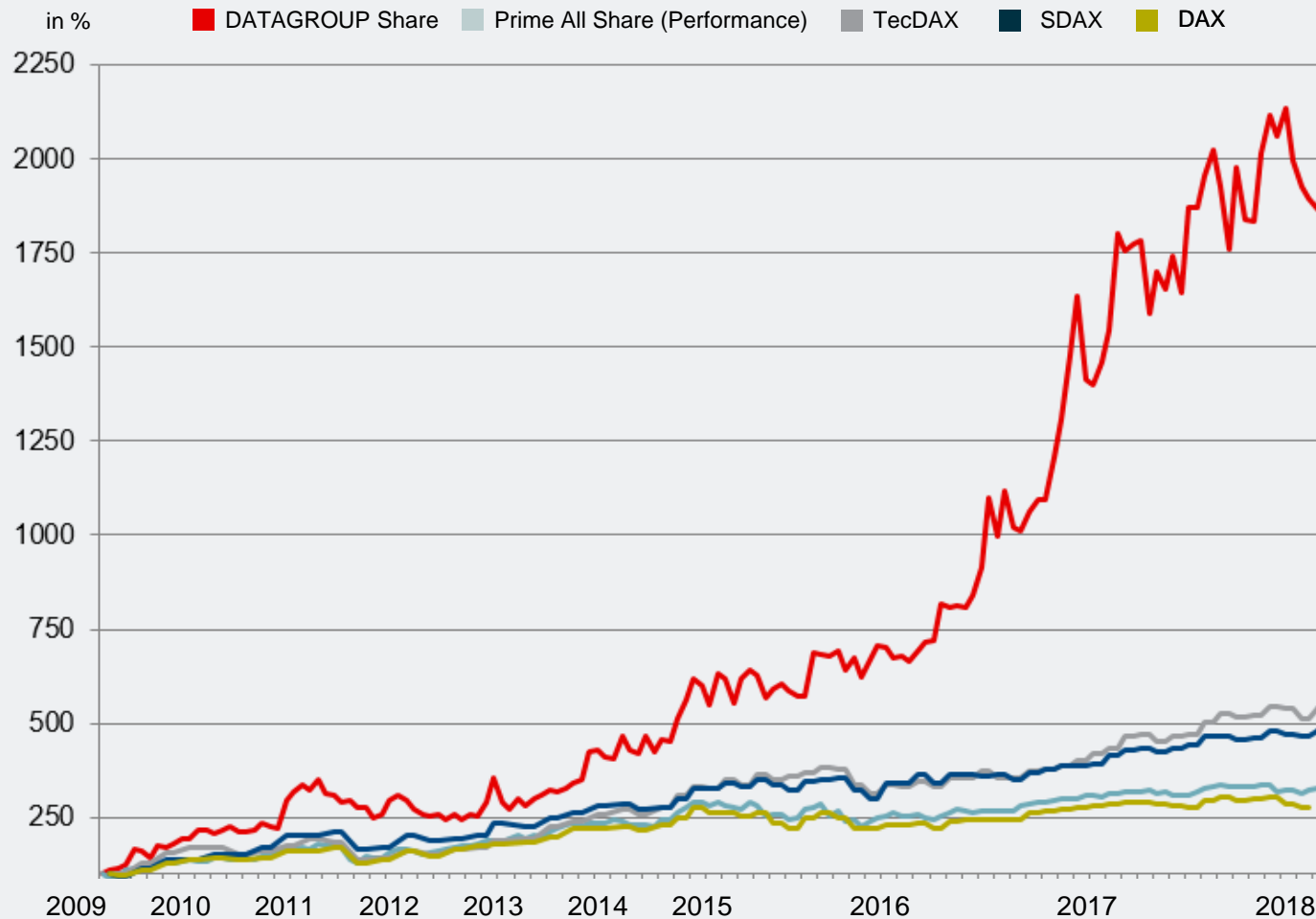


Total number of shares:
8.349m

Market cap (08/05/2018):
EUR 343.6m

Free float is broadly diversified
among small cap funds and asset
managers.

DATAGROUP share vs. indices



€ 41.15
(Status: 08/05/2018)

Analysts' comment
(Target price/rating)

Warburg Research
€53.00, Buy

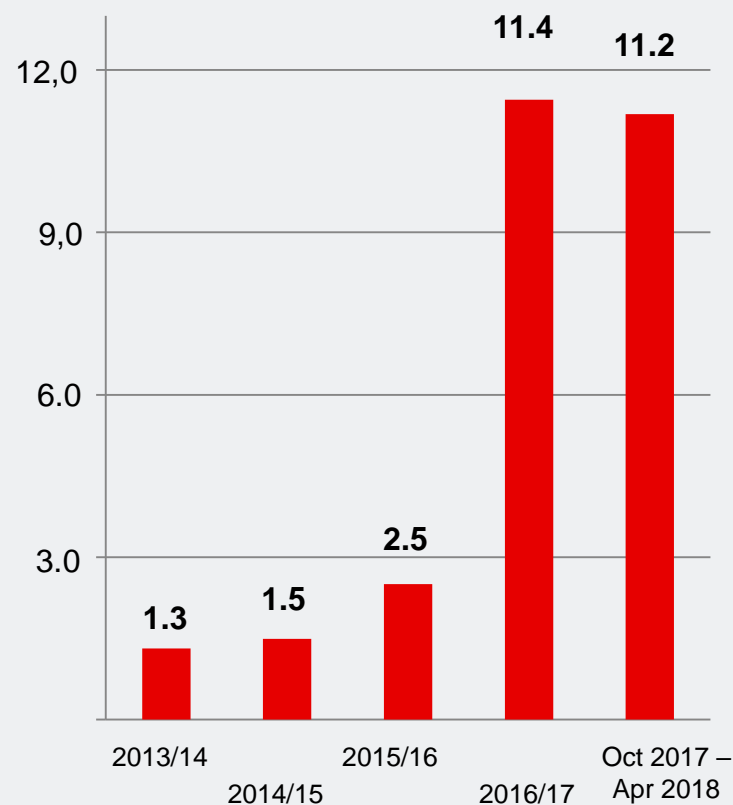
Hauck & Aufhäuser
€45.00, Buy

Baader Helvea
€29.00, Sell

Share trading volume

Period	Avg. daily volume (unit)	Trading volume (unit)
May 2017	31,601	695,226
Jun 2017	23,231	487,845
Jul 2017	9,784	205,472
Aug 2017	13,118	301,705
Sep 2017	10,582	222,223
Oct 2017	9,311	195,526
Nov 2017	22,423	493,315
Dec 2017	7,591	144,226
Jan 2018	14,769	324,914
Feb 2018	17,019	340,388
Mar 2018	11,571	242,992
Apr 2018	9,214	184,287
<i>Last 12 M</i>	<i>15,018</i>	<i>3,838,119</i> <i>(319,843 / month)</i>

Average trading volume per month (in m Euro)



Thank you for your attention!

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Selected profit and loss statement figures

in TEUR	30.09.2016	30.09.2017	Changes
Revenues	174.918	223.142	27,6%
Other own work capitalised	487	627	28,7%
Total revenues	175.405	223.769	27,6%
<i>Material expenses / expenses for purchased services</i>	58.172	64.230	10,4%
Gross profit	117.233	159.539	36,1%
<i>Personnel expenses</i>	85.710	119.851	39,8%
EBITDA	19.103	27.041	41,6%
EBIT	12.675	18.590	46,7%
<i>Financial result</i>	-2.584	-1.991	-22,9%
EBT	10.091	16.599	64,5%
Net income	5.715	11.199	96%
EPS (in EUR)	0,75	1,41*	88%

Selected key balance sheet figures

in TEUR	30.09.2016	30.06.2017	Changes
Goodwill	38,523	39,630	2,9%
Long-term financial liabilities	97,367	96,610	-0,8%
<i>thereof liabilities to financial institutions</i>	47,820	40,111	-16,1%
<i>thereof liabilities from finance leases</i>	4,017	3,601	-10,4%
<i>thereof pension provisions</i>	41,829	38,637	-7,6%
Short-term liabilities	34,011	57,928	70,3%
<i>thereof liabilities to financial institutions</i>	250	7,874	3049,6%
Cash and cash equivalents	24,424	53,179	117,7%
Accounts receivable	16,068	26,760	66,5%
Accounts payable	2,646	4,454	68,3%
Net financial debt (short and long term)	24,724	4.124	- 83,3%
Equity ratio ¹⁾ (in %)	19.0	28.9 	52,1%
Return on equity ²⁾ (in %)	21.8	25.5 	17,0%
Balance sheet total	159,746	213,390 	33,6%