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The logo for 4iG, featuring a stylized lowercase 'i' with a dot and a large uppercase 'G', both in white. The background is a vibrant digital scene with blue and orange light trails, binary code, and starburst effects.

4iG

INVESTOR PRESENTATION
Q2 & H1 2022 RESULTS

1 SEPTEMBER 2022

Q2 & H1 2022 RESULTS

2022 KEY EVENTS TO DATE: UPDATE SINCE Q1 EARNINGS CALL



HUNGARY

ABROAD



1st July '22:
Top Executives Appointed,
to Oversee Hungarian
Telecoms Operations

4th July '22:
Dividend of 29 HUF Per
Share Paid

22nd Aug '22:
Acquisition of Vodafone
Hungary Announced

26th Aug '22:
New Shares Start Trading
on BSE

1st Sept '22:
New Corporate Governance
Structure Adopted

9th June '22:
VP International Operations
Appointed, Based in Tirana

28th July '22:
Albania Post-merger CEO and
Management Team Appointed

3rd Aug '22:
SpaceCom 20% Pre-ruling By
Israeli Ministry

3rd Aug '22:
Montenegro Commercial 5G
Services Launched. First for
4iG Group

FIRST PHASE OF EXPANSION STRATEGY COMPLETED



- 4iG is **Hungary's leading IT systems integrator**. By H1 2022, 4iG is set to become the **second largest Hungarian telecommunications group**, as well as a **leader in the Western Balkans** region.
- 4iG's **telecoms portfolio** now comprises **73% of revenues** and **94 % of EBITDA**, with significantly improved profitability in H1 2022, with an **improved EBITDA margin** from 5.5% to **25.2%** year-over-year (yoy), a **recurring revenue base** and **diversified business profile** of the Group.
- **New senior executives** have been appointed to oversee the integration and management of the Group's telecoms companies.
- 4iG's acquisitions of ALBtelecom and One Telecommunication have made **4iG Albania's largest foreign investor**. Through a merger and rebranding of the two companies, 4iG seeks to create **Albania's leading convergent telecoms operator**, with the largest transmission network and a **5G-ready mobile network**.
- As of 1st April 2022, 4iG successfully rebranded its **Montenegrin mobile operator** as **One Crna Gora** and has begun **offering 5G internet access** to customers.
- Further **integration** of new acquisitions and leveraging of **revenue and cost synergies** within the Group are expected to boost the performance of 4iG's telecoms business.
- Despite external global challenges (wage increases, inflation, rising energy costs, FX volatility) the Group has increased the efficiency of its operations and **increased its revenue-generating capacity**.
- 4iG Plc. **paid dividends*** of HUF 29 per share on 4 July 2022, equivalent to a **dividend yield of 3.67%**.

*At the Company's Annual General Meeting, the shareholders approved the payment of a dividend of HUF 29 per share for the 102,350,843 quantity ordinary shares marketed on 31 December 2021 and reduced by 857,078 quantity of Treasury shares.

STRATEGIC OBJECTIVES AND VISION: SECOND PHASE OF GROWTH: TRANSFORMATION INTO A LEADING NATIONAL AND REGIONAL FULL FIXED-TO-MOBILE CONVERGENT TELCO GROUP

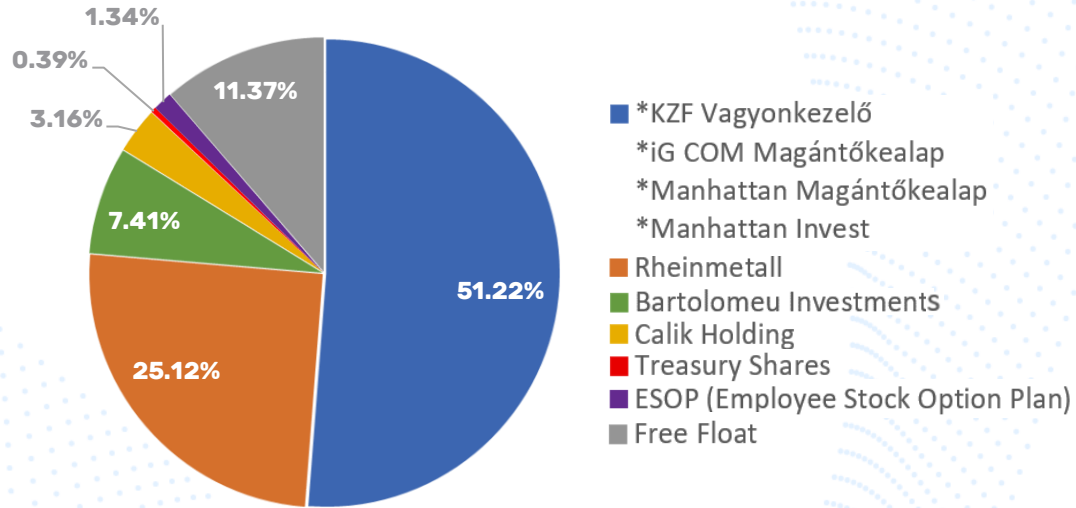
I. EXECUTION OF GROUP LEVEL INTEGRATION & LEVERAGING OPERATIONAL SYNERGIES

- 4iG seeks to **strengthen** its position **and expand** its offering of **IT** and **telecoms services** in Hungary and markets throughout the region.
 - In Q3 2022, 4iG adopted a **new corporate governance structure**, which will boost efficiency and competitiveness through **improved intra-Group cooperation**.
 - 4iG has appointed a separate **management team to oversee its Hungarian telecoms** operations and support regional expansion and M&A integration.
 - **DIGI** began **to streamline** its **services** to enhance more efficient operations.
 - 4iG has initiated the **merger of its Albanian subsidiaries** and the **restructuring of business operations**. In addition, appointed new management to oversee each company's integration.

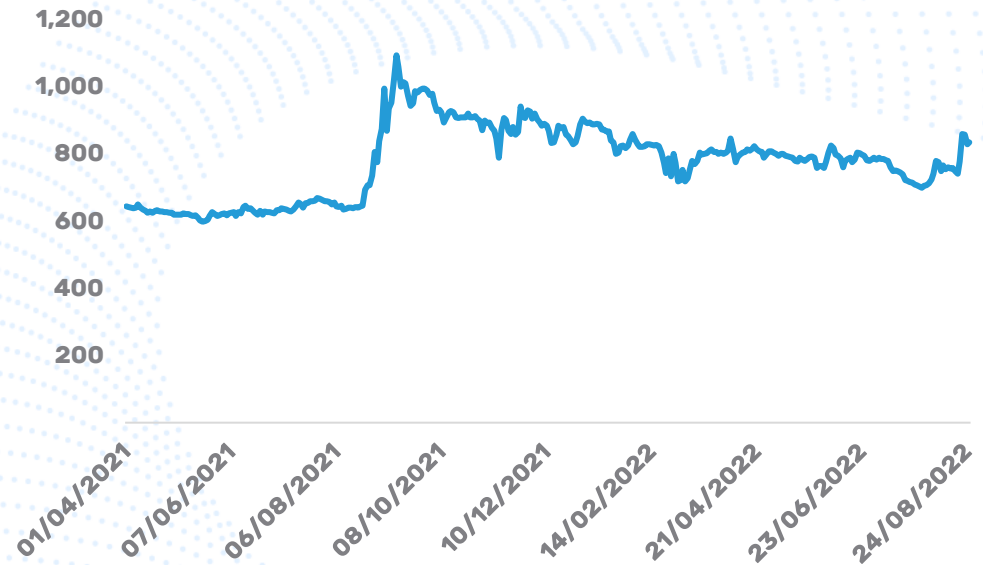
II. STRATEGIC ACQUISITION OF VODAFONE HUNGARY: COMBINED ENTITY WOULD BE A MAJOR REGIONAL PLAYER

- **4iG / Vodafone deal announced**, which offers **new perspectives** and the potential for further growth through cross-selling and **full fixed-to-mobile convergence**, as well as through scale, with **material B2B and B2C revenue synergies anticipated**.
 - 4iG's acquisition of Vodafone Hungary could re-shape the **Hungarian telecoms market**.
 - The Vodafone deal could **elevate 4iG's role in the mobile telecommunications space** in Hungary.

KEY SHAREHOLDERS AS OF 30TH JUNE 2022



SHARE PRICE PERFORMANCE (HUF)



4iG is part of The Austrian Wiener Börse
region CECE Index

4iG Market Cap
(25th Aug 2022)
HUF 250 Bn

Listed on the Prime Market of the Budapest Stock Exchange

*Gellért Jászai's direct control
Source: BET

FINANCIALS Q2 & H1 2022 REPORTED



4iG Group (HUF Th)	Q2 2021	Q2 2022	% change	H1 2021	H1 2022	% change
Net Revenues	16,854,115	72,905,337	333%	32,122,231	121,850,723	279%
Other operating income	136,797	2,291,337	1,575%	267,152	22,325,859	8,257%
Total income	16,990,912	75,196,674	343%	32,389,383	144,176,582	345%
Cost of Goods and Services Sold	11,091,984	21,390,368	93%	21,944,075	41,504,840	89%
Operating expenses	1,450,986	20,339,648	1,302%	2,390,684	28,799,436	1,105%
Personnel expenses	3,656,745	14,008,153	283%	6,253,053	24,628,671	294%
Other expenses	21,050	3,308,598	15,618%	27,668	18,573,283	67,029%
Operating costs	16,220,765	59,046,768	264%	30,615,480	113,506,230	271%
EBITDA	770,147	16,149,907	1,997%	1,773,903	30,670,352	1,629%
EBITDA margin	4.6%	22.2%		5.5%	25.2%	
Depreciation and amortisation	558,986	13,881,508	2,383%	852,318	21,979,702	2,479%
EBIT	211,161	2,268,399	974%	921,585	8,690,650	843%
Financial income	162,015	5,261,929	3,148%	250,371	11,056,658	4,316%
Financial expenses	251,544	8,681,206	3,351%	340,978	17,011,793	4,889%
Profit before taxes (PBT)	121,632	-1,150,878	-1,046%	830,978	2,735,515	229%
Income taxes	194,853	-570,755	-393%	338,673	1,129,029	233%
Profit / Loss after Tax	-73,221	-580,123	692%	492,305	1,606,486	226%

Q2 2022 OVERVIEW:

- **Net Revenue** up by 333% yoy to HUF 72.9 Bn
- **EBITDA** up by 1,997% yoy to HUF 16.1 Bn
- **EBITDA** margin improved from 4.6% to 22.2% yoy
- **PAT** down by 692% yoy to HUF 580 Mn

H1 2022 OVERVIEW:

- **Net Revenue** up by 279% yoy to HUF 121.9 Bn
- **EBITDA** up by 1,629% yoy to HUF 30.7 Bn
- **EBITDA** margin improved from 5.5% to 25.2% yoy
- **PAT** up by 226% yoy to HUF 1.6 Bn

NON-RECURRING ITEMS:

- In H1, the Group presented non-recurring items related to acquisitions, contributions and strategic restructurings under *Other operating income* and *Other operating expenses*, which non-recurring items had a **HUF 4.85 Bn total positive EBITDA impact**.

BREAKDOWN BY SEGMENTS: Q2 2022

Net Revenue Split (HUF Mn)

Net Revenues (HUF Mn)	Q2 2021 (actual)	Q2 2021 (proforma)	Q2 2022 (actual)	Q2 2022 (proforma)
IT	16,142	16,713	17,367	17,367
Telco	713	73,639	55,539	55,539
Holding*	0	0	0	0
Total	16,854	90,351	72,905	72,905

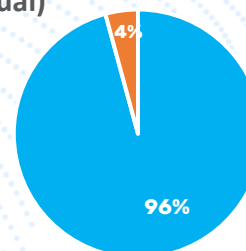
EBITDA Split (HUF Mn)

EBITDA (HUF Mn)	Q2 2021 (actual)	Q2 2021 (proforma)	Q2 2022 (actual)	Q2 2022 (proforma)
IT	756	787	295	295
Telco	310	12,991	16,362	16,362
Holding*	-296	-296	-507	-507
Total	770	13,483	16,150	16,150

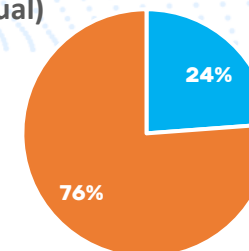
*Holding Segment: includes expenses related to strategic and operational governance of the Group and the one-off items not allocated to the operative segment.

Net Revenue Split (% of total)

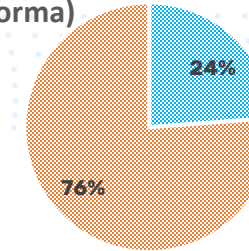
Q2 2021 (actual)



Q2 2022 (actual)



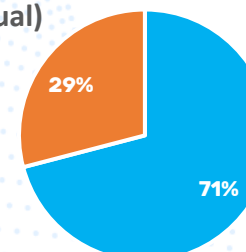
Q2 2022 (proforma)



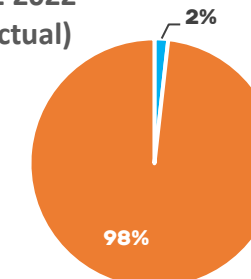
■ IT ■ Telco

EBITDA Split (% of total)**

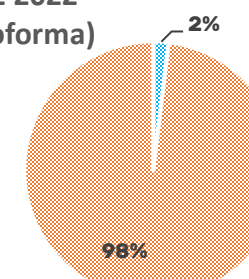
Q2 2021 (actual)



Q2 2022 (actual)



Q2 2022 (proforma)



■ IT ■ Telco

**Note: EBITDA impact is excluded from the total for EBITDA split calculation purposes displayed on the charts.

BREAKDOWN BY SEGMENTS: H1 2022

Net Revenue Split (HUF Mn)

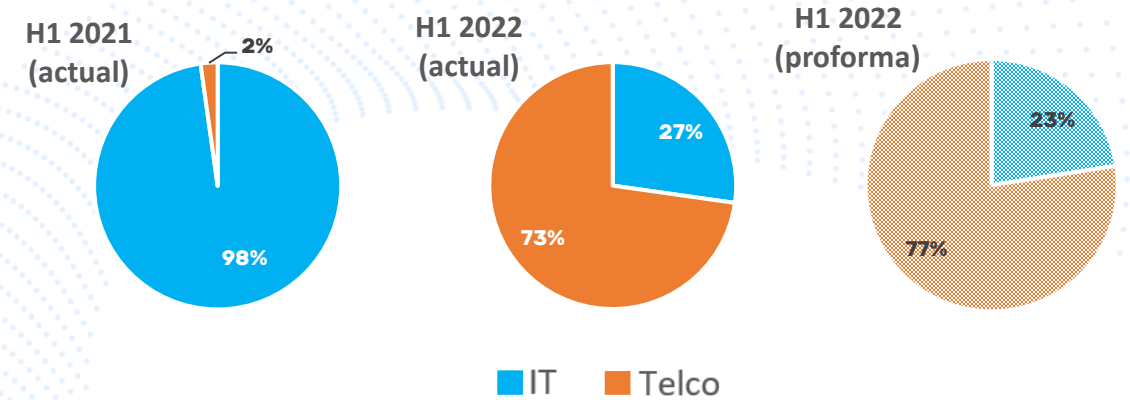
Net Revenues (HUF Mn)	H1 2021 (actual)	H1 2021 (proforma)	H1 2022 (actual)	H1 2022 (proforma)
IT	31,410	33,374	33,195	33,195
Telco	713	125,139	88,656	112,858
Holding*	0	0	0	0
Total	32,122	158,513	121,851	146,053

EBITDA Split (HUF Mn)

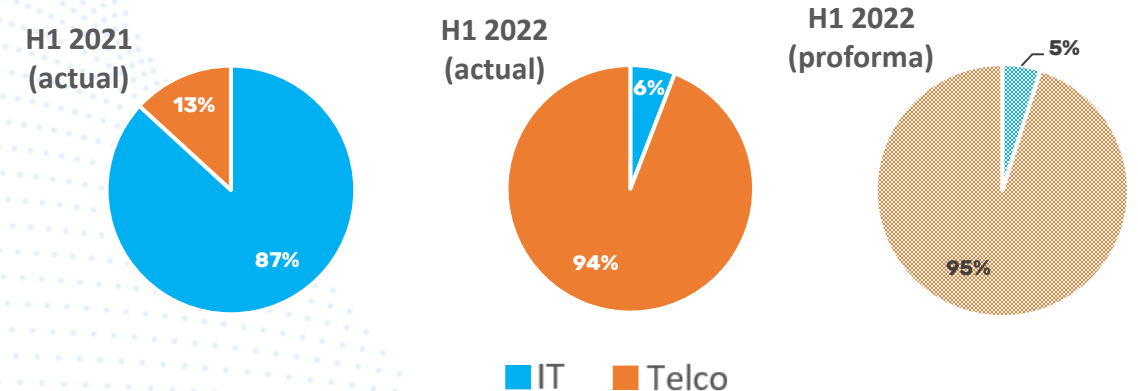
EBITDA (HUF Mn)	H1 2021 (actual)	H1 2021 (proforma)	H1 2022 (actual)	H1 2022 (proforma)
IT	2,041	2,143	1,636	1,636
Telco	310	28,212	26,256	32,919
Holding*	-577	-577	2,779	2,779
Total	1,774	29,778	30,670	37,333

*Holding Segment: includes expenses related to strategic and operational governance of the Group and the one-off items not allocated to the operative segment.

Net Revenue Split (% of total)



EBITDA Split (% of total)**



**Note: EBITDA impact is excluded from the total for EBITDA split calculation purposes displayed on the charts.

BREAKDOWN BY SEGMENTS: IT MAINTAINED STATUS QUO AMID GLOBAL CHALLENGES

Net Revenue Split (HUF Mn)

Net Revenues (HUF Mn)	Q2 2021 (act)	Q2 2021 (pf)	Q2 2022 (act)	Q2 2022 (pf)	H1 2021 (act)	H1 2021 (pf)	H1 2022 (act)	H1 2022 (pf)
IT	16,142	16,713	17,367	17,367	31,410	33,374	33,195	33,195
Telco	713	73,639	55,539	55,539	713	125,139	88,656	112,858
Holding*	0	0	0	0	0	0	0	0
Total	16,854	90,351	72,905	72,905	32,122	158,513	121,851	146,053

EBITDA Split (HUF Mn)

EBITDA (HUF Mn)	Q2 2021 (act)	Q2 2021 (pf)	Q2 2022 (act)	Q2 2022 (pf)	H1 2021 (act)	H1 2021 (pf)	H1 2022 (act)	H1 2022 (pf)
IT	756	787	295	295	2,041	2,143	1,636	1,636
Telco	310	12,991	16,362	16,362	310	28,212	26,256	32,919
Holding*	-296	-296	-507	-507	-577	-577	2,779	2,779
Total	770	13,483	16,150	16,150	1,774	29,778	30,670	37,333

*Holding Segment: includes expenses related to strategic and operational governance of the Group and the one-off items not allocated to the operative segment.

Q2 2022 OVERVIEW:

- **Net Revenue** up by 7.6% yoy to HUF 17.4 Bn
- **EBITDA** down by -61% yoy to HUF 295 Mn
- **EBITDA margin** down from 4.7% to 1.7% yoy on an actual basis

H1 2022 OVERVIEW:

- **Net Revenue** up by 5.7% yoy to HUF 33.2 Bn
- **EBITDA** down by -20% yoy to HUF 1.6 Bn
- **EBITDA margin** down from 6.5% to 4.9% yoy on an actual basis

4iG KEPT MARKET LEADER POSITION AS HUNGARY'S TOP IT SYSTEMS INTEGRATOR:

- Recent **global events**, including the energy crisis, fluctuating exchange rates, the war in Ukraine, and global supply chain disruptions have **impacted operations**.
- In addition, the **IT division's performance was adversely affected** by higher import purchase prices due to the weakening of the Hungarian Forint and a temporary slowdown in public procurement, which have **impacted the entire IT industry**.
- Despite these challenges, on a yoy basis, the **IT business delivered increasing revenues**, but **elevated operating expenses kept profitability lower**.
- Going forward, a **strong backlog** and anticipated **cross-selling opportunities could help improving results** until year-end.
- The **Rheinmetall partnership** is **on track** and positions 4iG to **access new digitization markets**.

BREAKDOWN BY SEGMENTS: TELCO'S STRENGTHENED BUSINESS PROFILE DELIVERING STRONG DIVERSIFIED SALES MIX

4G

Net Revenue Split (HUF Mn)

Net Revenues (HUF Mn)	Q2 2021 (act)	Q2 2021 (pf)	Q2 2022 (act)	Q2 2022 (pf)	H1 2021 (act)	H1 2021 (pf)	H1 2022 (act)	H1 2022 (pf)
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Telco	713	73,639	55,539	55,539	713	125,139	88,656	112,858
Holding*	0	0	0	0	0	0	0	0
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EBITDA Split (HUF Mn)

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Holding*	-296	-296	-507	-507	-577	-577	2,779	2,779
Total	770	13,483	16,150	16,150	1,774	29,778	30,670	37,333

*Holding Segment: includes expenses related to strategic and operational governance of the Group and the one-off items not allocated to the operative segment.

Q2 2022 OVERVIEW:

- **Net Revenue** of HUF 55.5 Bn represents 76% of the total in Q2 2022 on an actual basis.
- **EBITDA** of HUF 16.4 Bn represents 98% of the total in Q2 2022 on an actual basis.
- **EBITDA margin** of 29.5% in Q2 2022 on an actual basis.

H1 2022 OVERVIEW:

- **Net Revenue** of HUF 88.7 Bn represents 73% of the total in H1 2022 on an actual basis. (proforma of HUF 112.9 Bn represents 77%)
- **EBITDA** of HUF 26.3 Bn represents 94% of the total in H1 2022 on an actual basis. (proforma of HUF 32.9 Bn represents 95%)
- **EBITDA margin** of 29.6% in H1 2022 on an actual basis. (proforma: 22.5% to 29.2% yoy)

HUNGARY:

- Impact of imposed supplementary telecommunication tax recorded in Q2 2022 related to revenue generated during the first six months of 2022.
- **Antenna Hungaria** recorded **strong EBITDA growth** despite the imposed supplementary telecommunication tax. The revenue drop is due to the **discontinuation** of the low-margin **event management business**.
- **DIGI** and **Invitech** delivered and kept **stable revenue base** while **Q2 EBITDA was impacted by** the imposed supplementary telecommunication **tax** and **one-offs**.

ALBANIA:

- **EBITDA growth** supported by **increased service revenues** and the continuation of the successful **pre-to-post paid migration** strategy.

MONTENEGRO:

- **EBITDA growth** supported by **good results in early tourist season** and the continuation of the successful **pre-to-post paid migration** strategy.

H1 2022 B/S – FINANCIAL DEBT AND CAPITALISATION



FINANCIAL DEBT	HUF Th
Credits & loans & bonds (long-term)	470,643,175
Financial lease liabilities (long-term)	72,929,252
Provisions (long-term)	3,398,894
Credits & loans (short-term)	7,764,481
Financial lease liabilities (short-term)	6,549,942
H1 2022 TOTAL DEBT	561,285,743
Cash and equivalents	-101,921,378
H1 2022 NET DEBT	459,364,365

CAPITALISATION	as of 25 AUG 2022
Share Price (HUF)	835
Total Number of Shares	299,074,974
MARKET CAP (HUF Th)	249,727,603
H1 2022 NET DEBT (HUF Th)	459,364,365
ENTERPRISE VALUE (HUF Th)	709,091,969

ACQUISITION OF VODAFONE HUNGARY



TRANSACTION PARAMETERS

- 4iG Plc. to acquire a 51% stake and Corvinus Zrt., representing the Hungarian State to acquire a 49% stake in Vodafone Magyarország Távközlési Zrt., excluding Vodafone's shared services business in Hungary (VOIS).

DEAL TERMS

- Enterprise Value (EV): HUF 715 Bn
- Transaction Multiple: **7.7x** EV/EBITDA* for the 12-month period ending 31 March 2022 vs. **6.1x** post-synergies FY22 EV/adj. EBITDA*

DEAL STRUCTURE

- 4iG Plc. to finance 51% of the purchase price with a mix of debt and cash
- Hungarian State to finance 49% of the purchase price with cash consideration

APPROVALS

- Necessary regulatory approvals
- 4iG Plc. Boards of Directors' approval

TIMETABLES

- Due diligence commenced in August 2022
- Closing expected by end of 2022

**Transaction value excludes IFRS 16 lease liabilities*

VODAFONE HUNGARY ACQUISITION – KEY METRICS



Enterprise Value (EV) HUF 715 Bn

- Total cash consideration
- Cash free, debt free

Revenues HUF 278 Bn

- The twelve month period ending 31 March 2022

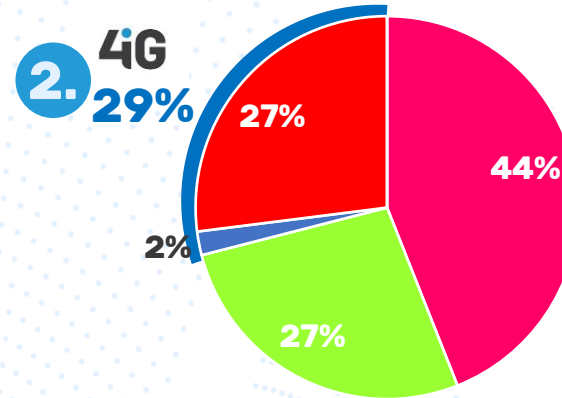
EBITDA HUF 93 Bn

- The twelve month period ending 31 March 2022
- EBITDAaL (EBITDA after Lease) HUF 79 Bn

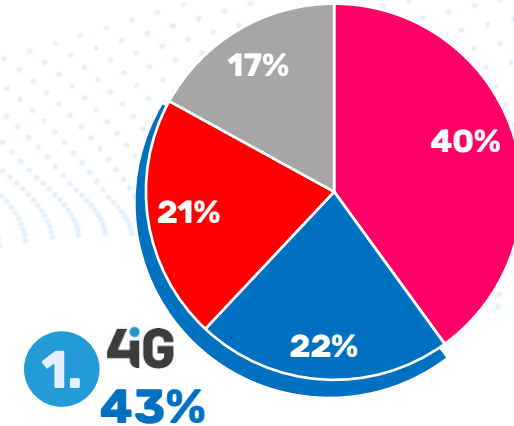
3.8 million customers

- 3.0 million mobile revenue generating units (RGUs)
- 0.7 million fixed broadband RGUs
- 0.7 million TV RGUs
- 0.6 million fixed-line telephony RGUs

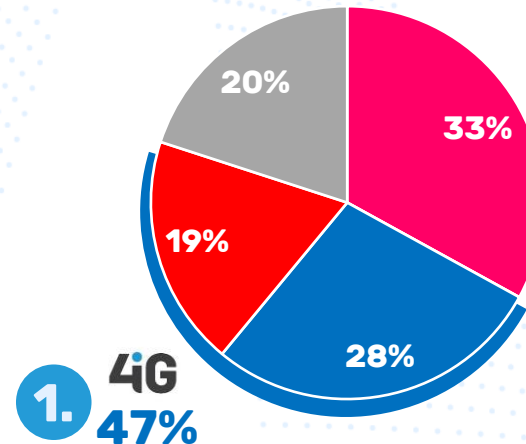
Mobile RGUs



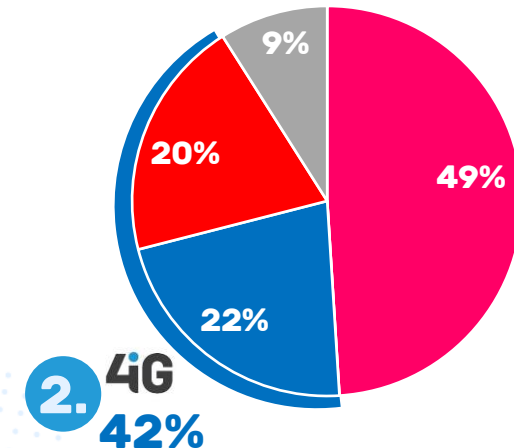
Fixed broadband RGUs



TV RGUs



Fixed telephony RGUs



■ Telekom ■ Yettel ■ 4iG (Digi, Invitel, Invitech, AH) ■ Vodafone ■ Other

VODAFONE HUNGARY ACQUISITION – INVESTMENT RATIONALE

4G

Strategic Fit – The Last Piece Of The Puzzle

- Strengthen mobile network in the home market, outstanding radio spectrum portfolio
- Become Nr. 1 fixed broadband and TV provider
- Passive towers carved out to Vantage: no negative impact on competitiveness or strategic autonomy – in-line with latest industry trends (e.g. Deutsche Telekom Germany’s sale of 51% of towers ownership in July 2022).
- Only independent mobile player not bound by active network and spectrum sharing agreements with competitors, enabling full autonomy in investments and pricing

Credible Fully Convergent Challenger To Magyar Telekom

- Become strong Nr. 2 Hungarian mobile operator – leading mobile network¹
- Secure market leader position in fixed broadband and TV

State Ownership Is The Norm, Not The Exception

- Increased financial security ahead of 5G and digitization investment cycle
- New narrative: Hungarian IT-Telco regional leader (“Hungarian multi story”)
- European Telco private-public “National Champions”: e.g. Germany, France, Austria, Norway, Sweden, Denmark, Finland, Belgium, Switzerland, Slovenia, Serbia, Croatia, Greece
- Previously, Vodafone entered Hungary in 1999 in a similar private-public partnership with Antenna Hungária and Magyar Posta (V.R.A.M.)
- Stable ownership structure maintained: 25% Rheinmetall ownership

Solid Headquarters For New International IT-Telco Group

- Acquiring top industry know-how
- Cross-border synergies in technology, procurement, brand and product development



¹Umlaut independent measurements Q2 2022

SIGNIFICANT IN-MARKET SYNERGY DRIVERS

Revenues

- Major fixed-mobile-TV upselling and cross selling potential
- Becoming credible fully convergent challenger to Magyar Telekom
- Mobile market share growth potential
- Very conservative revenue synergy factored into our base case NPV synergy calculation

Cost And CAPEX Reduction Via Infrastructure Consolidation

- Building the best mobile grid, reusing some of DIGI's mobile sites for grid densification
- Fiberization of Vodafone's mobile sites using DIGI, Invitech and Antenna Hungaria fibre
- Superior 5G spectrum portfolio of Vodafone boosted by DIGI's spectrum
- Consolidation of fixed-line access networks
- Consolidation of TV platform and content
- Consolidation of IT systems

Cost And CAPEX Reduction Via Business Functions Rationalisation

- Marketing
- Sales, store network
- Management
- Support functions
- Overheads
- Procurement

SYNERGIES

NPV HUF 150-300 Bn

Run-rate HUF 20-30 Bn

TRANSACTION VALUATION HIGHLIGHTS



EV/EBITDA Transaction Multiple In Line With Precedents

- 9.1x EV/EBITDAaL
- 7.7x EV/EBITDA
- 7.2x FY22 EV/adj. EBITDAaL factoring in the most conservative synergies estimation
- 6.1x FY22 EV/adj. EBITDA factoring in the most conservative synergies estimation
- Fixed-mobile multiples tend to be higher than mobile-only multiples

HUF 89 Bn Recently Invested In Spectrum

- Secured outstanding 5G spectrum portfolio in 2020 and 2021
- No major spectrum investments expected in mid-term

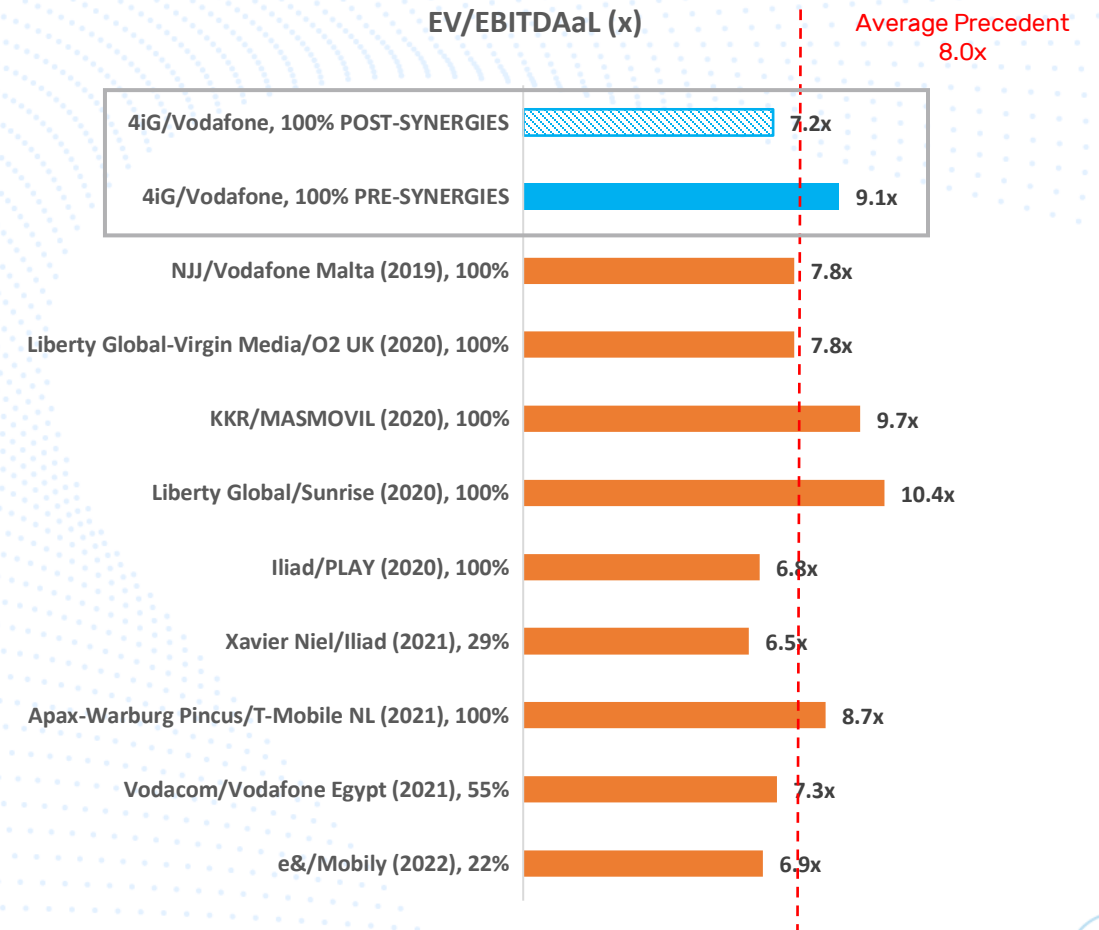
Full IT Stack Modernization CAPEX Cycle To Be Completed Before Closing

- Tens of billions of HUF investment value incorporated in the purchase price

Business Plan And EV Sizing Will Be Validated By Independent International Experts

- Big 4 accounting firms and top international specialist consultancies performing legal, technical commercial and financial due diligence
- Validation of synergies
- International credit rating agencies involved (e.g. SCOPE Ratings)

Select Precedent Transaction Multiples 2019-2022



Q&A

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THANK YOU FOR YOUR ATTENTION!

APPENDIX

IT SEGMENT: H1 2022 GROUP CONSOLIDATION OF FINANCIAL RESULTS:

- In H1 2022, financial results of all companies in the IT segment were fully consolidated to the Group's financial results.

TELCO SEGMENT: H1 2022 GROUP CONSOLIDATION OF FINANCIAL RESULTS:

- In H1 2022, companies were fully consolidated to the Group's financial results: One Crna Gora, DIGI, Invitech, HDT.
- ALBtelecom: four months (March-June) performance was consolidated (closing on 4th March, 4iG acquired 80.27% stake).
- ONE Telecommunications: Q2 performance was consolidated (closing on 21st March, 4iG acquired 99.9% stake).
- Antenna Hungária: Q2 performance was consolidated (based on International Financial Reporting Standards (IFRS) 4iG obtained control on 22nd March; closing on 31st March, 4iG acquired 76.78% stake).

WE CAUTION YOU THAT A NUMBER OF IMPORTANT FACTORS COULD CAUSE ACTUAL RESULTS TO DIFFER MATERIALLY FROM THOSE CONTAINED IN ANY FORWARD-LOOKING STATEMENT. IN ADDITION TO FIGURES PREPARED IN ACCORDANCE WITH IFRS, 4iG ALSO PRESENTS OTHER FINANCIAL PERFORMANCE MEASURES, INCLUDING, AMONG OTHERS, EBITDA, EBITDA AL, EBITDA MARGIN, AND NET DEBT. THESE OTHER MEASURES SHOULD BE CONSIDERED IN ADDITION TO, BUT NOT AS A SUBSTITUTE FOR, THE INFORMATION PREPARED IN ACCORDANCE WITH IFRS. THESE OTHER FINANCIAL PERFORMANCE MEASURES ARE NOT SUBJECT TO IFRS OR ANY OTHER GENERALLY ACCEPTED ACCOUNTING PRINCIPLES. OTHER COMPANIES MAY DEFINE THESE TERMS IN DIFFERENT WAYS.

THIS PRESENTATION DOES NOT QUALIFY AS AN INVESTMENT OFFER, ACCORDING TO § 5 PARAGRAPH 1, POINT 9 OF THE CAPITAL MARKETS ACT, AND DOES NOT CONTAIN ANY ANALYSIS, PROPOSAL OR OTHER INFORMATION ABOUT INVESTMENT ANALYSIS, FINANCIAL INSTRUMENT, STOCK MARKET PRODUCT OR ITS ISSUER (ISSUERS), THE PUBLICATION OF WHICH, BY ITSELF OR IN ANOTHER WAY, MAY INFLUENCE THE INVESTOR TO INVEST HIS OWN OR OTHER PEOPLE'S MONEY , OR MAKE YOUR OTHER ASSETS PARTIALLY OR ENTIRELY DEPENDENT ON THE EFFECTS OF THE CAPITAL MARKET, BSZT. (ACT ON INVESTMENT COMPANIES AND COMMODITY EXCHANGE SERVICE PROVIDERS) § 4. UNDER PARAGRAPH (2) POINT 8.