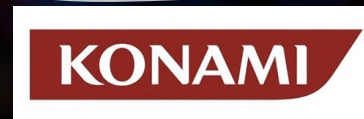


Talking All Things Gaming

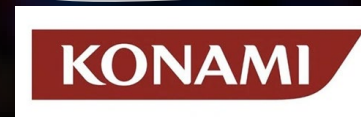
Manufactures Representative Panel Discussion



NZ Class 4 By The Numbers

DIA Licenced Stats

Presented by Adam Darracott (Aristocrat)



Introductions



Jared Gemmell



Adam Darracott



Barry Crossley – GMD

Niel Wilkins – UGL



Sam Clark



Mark Tooman

Matt Pedersen



Class 4 EGM numbers

- 13,608 total EGMs
- Trusts 11,500 (85%)
- Clubs – 2,100 (15%)
- 147 clubs with gaming machines



Market Overview

- Over \$1,000,000,000 in GMP until end of March 2026 (12 months)
- Roughly 1,000 new EGMs until end of June 2026 (12 months)
- 7.5% churn of machines across the market
- Club numbers slightly lower than this



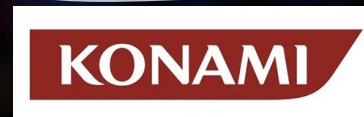
Why Upgrade?

- Offers the latest games to members and future proofs the room
- Cuts down on Service issues, costs and downtime of machines
- More chance members play at the club rather than going elsewhere
- Is there a replacement strategy and plan?



Changes are Coming

New National Standards
Presented by Sam Clark (Konami)



KONAMI

NS12.1 UPDATES

Konami Australia

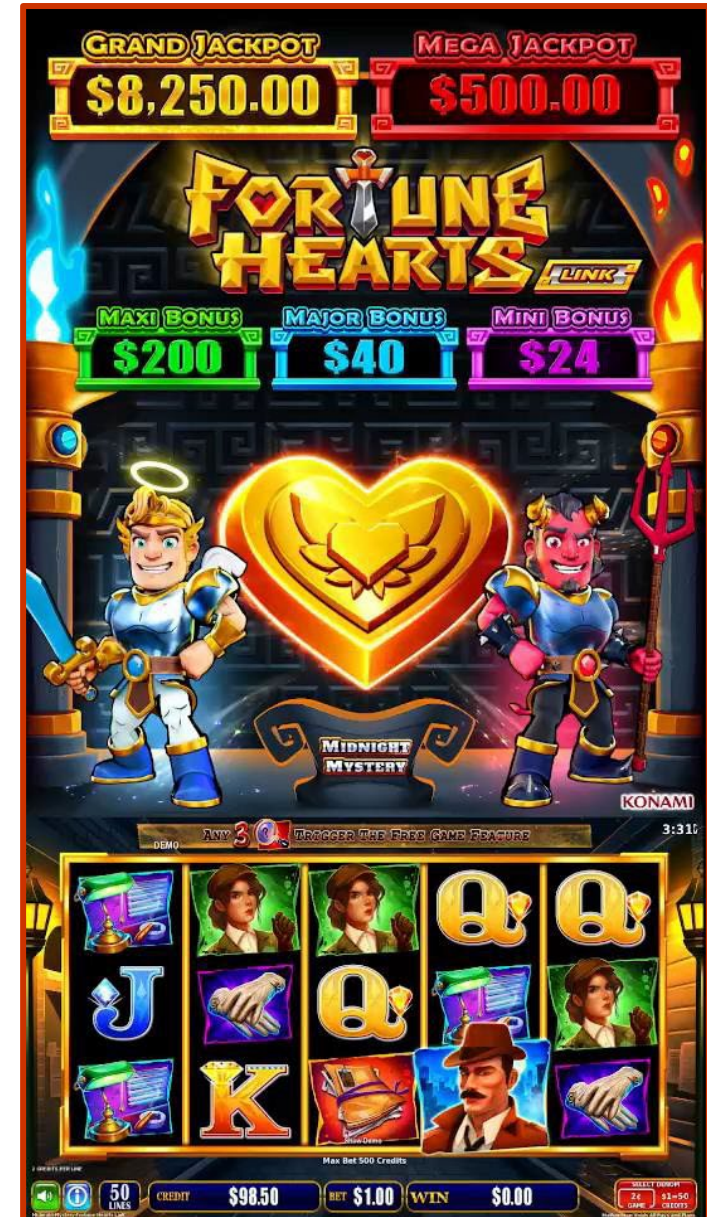
FUNdamentally

GAME AND FEATURE UPDATES

- Removal of Hyper Spin
- Hold & Spin Credit Prize Updates
- Win Sound Adjustments
- Reel Bounce Update
- Button Panel Size Changes
- 1Cr Bet Requirement
- Free Games Limit
- Credit Prize Limit

HYPERSPIN REMOVAL

- Reel 4 previously presented a Hyper Spin when scatters had landed on reels 2 and 3, creating anticipation for a scatter to potentially land on reel 4
- Under the new standard, this anticipatory Hyper Spin animation is removed from reel 4
- Reel 4 will now exhibit the same reel movement as reels 2 and 3 when scatters land



HOLD & SPIN CREDIT PRIZE UPDATE

HOLD & SPIN (CURRENT)



HOLD & SPIN – NEW NS12.1



SOUND UPDATES



Previous Win Tune: 1.15 Seconds



Win Tune NS12.1: 0.70 Seconds

Win Tunes have been reduced to below 1 second when a win is less than the bet amount

REEL BOUNCE UPDATE

- Previously, symbols positioned above or below the active reel window were visible, even though they were not apart of the gameplay area
- Reel bounce will still occur, however, any symbols that fall outside of the active reel set – above or below, will no longer be visible during the bounce animation – As seen in Power Panther
- Only the symbols that belong to the current games active spin will be displayed on screen



Konami games since **Power Panther** have demonstrated the correct reel layout needed for NS12.1 – Symbols below or above the reel set cannot be seen.

BUTTON PANEL

Button Panel Size Changes

- All bet buttons are required to be of equal size for all bet amounts → All buttons listed below match the size of the **Bash Button**, resulting in no hardware changes
- **Spin, Play, Re-bet & Disengagement** buttons are all buttons within the scope of the above
- Rules, Volume Control and Information buttons are not part of the functional changes, but they will be resized to match the surrounding buttons to ensure regulatory compliance and eliminate any concerns about disproportionate design.



Current Button Panel



New NS12.1 Button Panel

ADDITIONAL NS12.1 CHANGES

Credit Prize Cap

- An in-symbol prize is not to display or award an amount that exceeds 150 x the games maximum bet
- \$375 coin is the maximum prize that can be shown on a single symbol
- These prizes must not be displayed in credits, only in Dollar or Cents value

Free Games Cap

- The number of Free Games that can be awarded from triggering in the base game or re-triggering during the Free Games is 20
- Additional Free Games can be awarded during Free Games if the total number of Free Games do not exceed 20

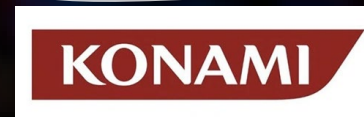
1 Credit Bet Requirement

- The minimum bet for any game must be in proportion to the number of lines provided per game and the denomination.
- The minimum bet for any game **must** always be 1 credit. E.g., a 1c denomination must contain the minimum bet of 1c.

The Future Of Class 4 Gambling

Evolution of the Pokie Room

Presented by Neil Wilkins (IGT) & Mark Tooman (Light & Wonder)



What Does the Future Hold

EMS Upgrade (Intralot)

- QCOM 1.6.7 to be included
- New Site Controllers to be rolled out 2027
- Introduction of TITO functionality (several dates floating 2027-2032)

Coinless Gaming Rooms

- CITO, TITO, Cashless

Manufacturer Technology Improvements

- EGM's – Bigger, Brighter, Faster
- GAMES – Multi Denom, Multi Feature

Proposed Legislative Changes

- Max Bet Value
- Max Prize Value
- Jackpot Levels



Future with Online Casinos

- Online Casino Market

“Online Casino’s are already operating here in NZ”

Estimated NZD \$700-800m current market

Include Sports Betting approx. NZD \$1.36b

- Regulation of Online Casino Market
 - Online Casino Gambling Act 2026 – 1st May 2026
 - Move from Grey to Regulated
 - Offshore operators need licence to enter NZ market – 1st Dec 2026
 - Constrained to a Max 15 x Online Licences (1 platform per licence)

Online Casinos cont...

- Steps to Regulation of Online Casino Market

“Who can get a licence?”

- Any operator that meets the requirements
 - Minimum NZD \$7.5m capital
 - Financial Capacity to participate effectively in licencing process
 - Support serious participation
 - Enable Competition
 - No Online Racing & Sports Betting in the platform (TAB NZ Exclusivity)

JULY
Expressions
Of Interest

SEPT
Licence
Auction

OCT
Licence
Application

DEC
Licences
Granted

Q&A Open Floor

