

We are Talenthouse

May 19th, 2022



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\$25.7m

Revenue*



200+

Employees



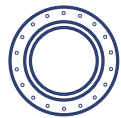
3.5m

creatives and 14.7
million members



43m

pieces of distinct
digital content



250

blue chip clients

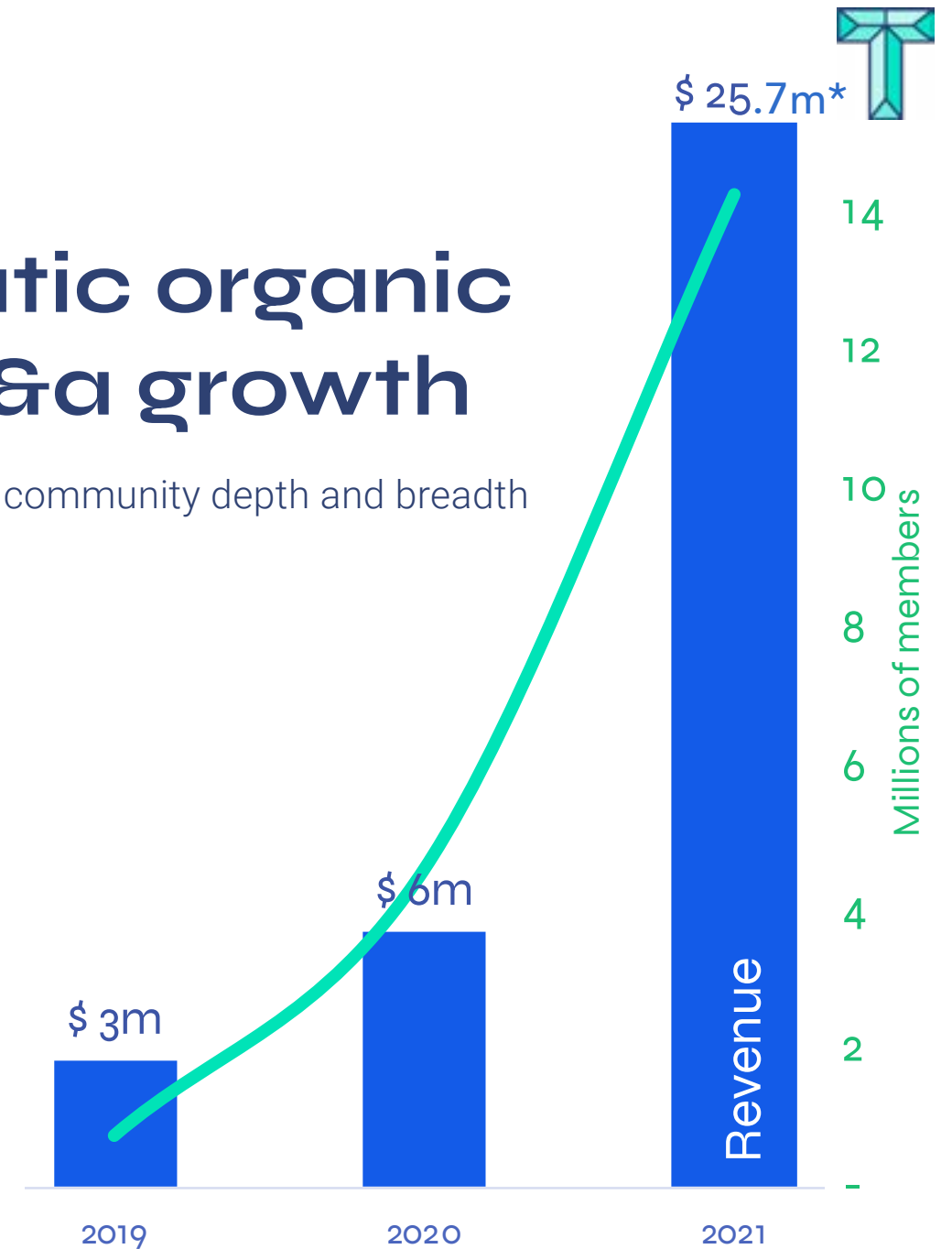


6

offices across Europe
and US

Dramatic organic and m&a growth

Material growth in community depth and breadth



* This number includes Coolabi as if it was 100% owned during the full calendar year 2021; we currently own 33% of Coolabi and intend to complete the acquisition in Q2 2022.

Investor highlights



1

Digitization has fundamentally transformed creative content, transferring power from companies and agencies to individual creatives

2

Talenthouse is powering this shift, providing a technology platform that mediates between creatives, brands, and IP owners in the creator economy

3

Our model has powerful network effects, more creatives attract more brands and vice versa – and today Talenthouse counts more than 3.5 million creatives on its platform

4

We are focused on three synergistic business lines, **content creation, content monetization, and community empowerment**



Who we are

1

Growth initiatives

2

Talenthouse performance

3

We are a tech company harnessing the world's largest creative community to produce high quality digital content for many of the biggest and most innovative brands in the world

Who we are



Senior leadership

We are Talenthouse, where creativity thrives because our team makes it so



Roman Scharf
Chairman of the Board

Founder of Talenthouse, GP at 3VC, former Founder of Jajah and Ecotech



Clare McKeeve
Director & CEO

Former Founder of Luxcite, Partner at Eaton Gate, COO of Macquarie EMEA



Scott Lanphere
Director & Chief of Corp. Dev.

Former Exec. Chair & Founder of OmnioOne, Former Partner at Advent International



Michael Callas
Head of Vertical Banking

LenddoEFL in Singapore, FELIS Group in Germany, Latinx, Vodafone and EY Digital Ventures



Mike Gamble
Head of Gaming

Director at RH45 Game Consulting, former Director of Business Development of Epic Online Services and Head of Epic Games Licensing EMEA



[TBA]
Head of Metaverse

We are in the process of uploading now...



Olivia Mellett
CFO

Former FD at Mission, Exec. Dir. of Operations at 4Kids Ent., and Finance Controller at Live Nation Music



Tim Ricketts
COO

COO at Coolabi Group, former FD at Gullane Ent., Program & Fin. Director at United Bus. Media, VP at MTM Ent.



Jeremy Banks
Chief of Content & CEO of Quest Digital

CEO at Coolabi Group, Former head of Commercial at Chorion PLC, Partner at Proven Ventures



Sara Brodin
CTO

CTO of VAI and Lead Dev. / CTO of 6/AM Group



Mark Paul
Head of Sales

.Senior Scout at Everton Football Club, former Senior Sales Acct. Mng. at Getty images



Dylan Wise
Head of Production

Former head of Production at Talenthouse and former producer at Zooppa



Lisa-Marie Paul
Head of Partnerships

Former Partnership Manager at Getty and Digital Brand Ambassador at Sony

+ 200 geniuses all over the world



ello community

Artist:

Who we are

a technology platform company



What we do

next generation high-end digital media content creation

How we do it

inspire our global community of 14.7 million members

How we make money

we charge a platform fee & management fees for the production of bespoke digital content & license content to companies for advertising & for entertainment

Community-first operating model

Creating a digital engagement ecosystem that supports enterprises and creatives alike



Content Creation

Our creative members produce bespoke content, such as videos, photography, 3D art, murals, AR for companies accessible through our technology platforms

Content Monetization

We license images to companies, such as photography; book publishing rights; or the rights to distribute our digital media assets, in return for which we receive royalty payment streams or licensing subscriptions

Creatives, users, members, fans, etc...

14.7m members, of which
3.5m Creatives
+
2m Gamers

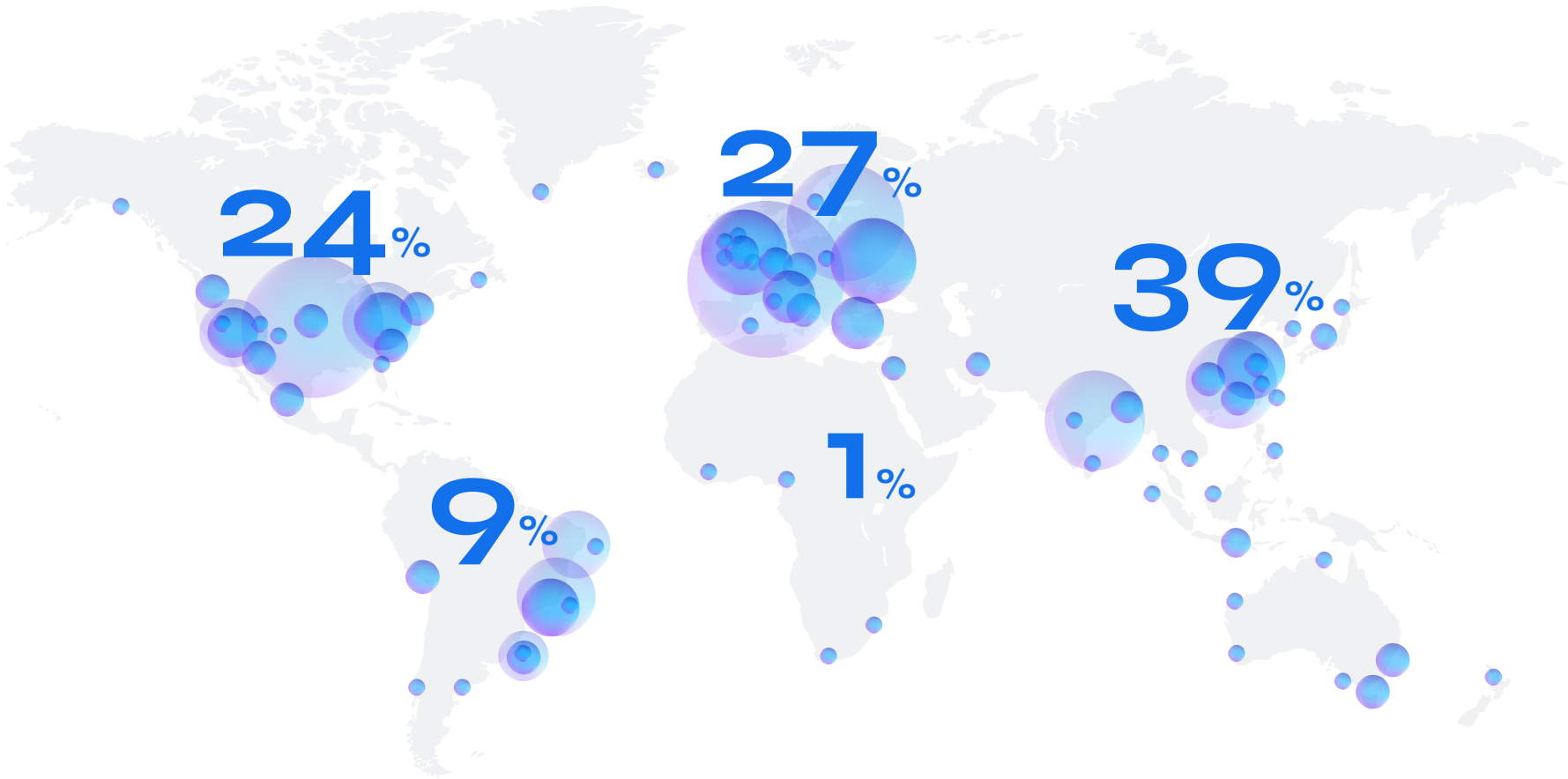
900,000 unique visitors and
300,000 'fan'-site members

Community Empowerment

New revenue lines for 2022: Our community of Creatives can pay subscription fees to Talenhouse for services that add value to help them become more efficient or to save them money compared to other options; for example money management services*

*Some services provided either directly or indirectly via licensed partners

International scale and flexibility through our community



Our **multidisciplinary Creatives** are able to generate **world-class work**. From photography, videography, to AR and 3D, and many more

63% of our community are Gen Z / Millennials

Talenthouse has over 2 million social followers

We have grown the community 20x over the past three years, and the diversity of capability is also growing, but with a strong graphics core at its heart

	Change*
Photography	1,686%
3D Art, AR/VR, Gaming	42%
Animation	26%
Illustration	17%
Art	22%
Music	8%
Film/Video	17%
Storytelling & Writing	29%
Other	20%

* Based on percentage change since 2019

Delivering fresh, authentic content at scale for all audiences globally

Enterprise clients

Prestige roster of leading multinational clients



Content for Marketing / Advertising

Leading Clients



Broader Client Roster



Content for Entertainment





Content creation

Scalable creative output



250+ Productions

18 Films were given new poster treatment

38,417
Awwssets created (not including stock content)

2 Full-length feature film proposals

400 Minutes of video content

650+ AR effects

1 Lego kid Creative director sourced

15 Countries hosted photography productions

Entertainment assets

Company-owned entertainment IP: Award-winning books, TV/digital series, digital gaming and merchandise

200+ million books sold to date, 200+ book series, (2,000+ titles), translated across 40 languages

120+ further titles contracted to 2024

Licensed IP with award-winning animation

60-70 new projects added each year, 10+ new properties brought to market annually

Extensive 'idea' vault



Technology

Asset Database and Core Platform

Scala-based proprietary technology core, Heroku PaaS & AWS cloud storage

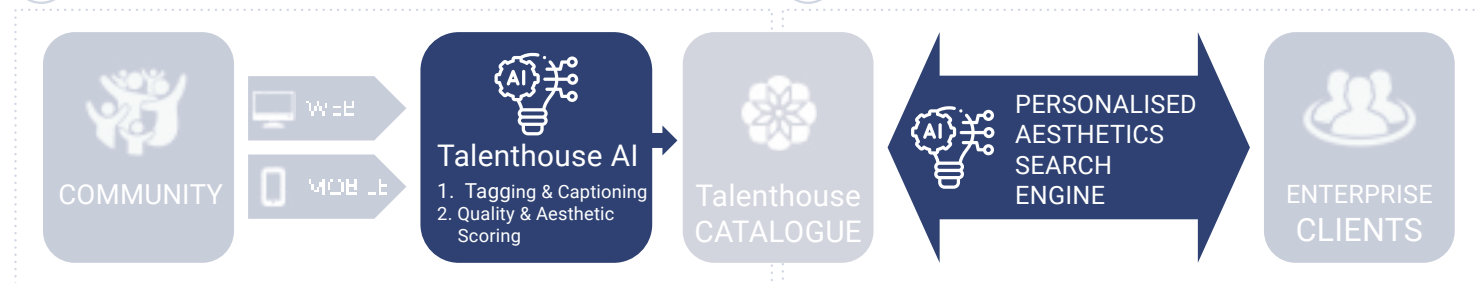


AI-driven computer image core

5 patents, industry leading AI technology for image curation and search

① Curation

② Search



TAGGING & CAPTIONING

- 1 Patent
- Unique tagging process
- Face recognition
- Image theft checks

QUALITY & AESTHETIC SCORING

- 3 Patents
- Automatic rejection of low-quality
- Trained to spot commercial viability
- 85% accuracy

PERSONALISED AESTHETICS SEARCH ENGINE

- 1 Patent
- Collection of complex work-flow that combine aesthetics, keywording and various heuristics (human behaviour algorithms)
- Providing highly tailored content for each brand based on formulated input



Growth initiatives



Talenthouse is at the centre of the creator economy



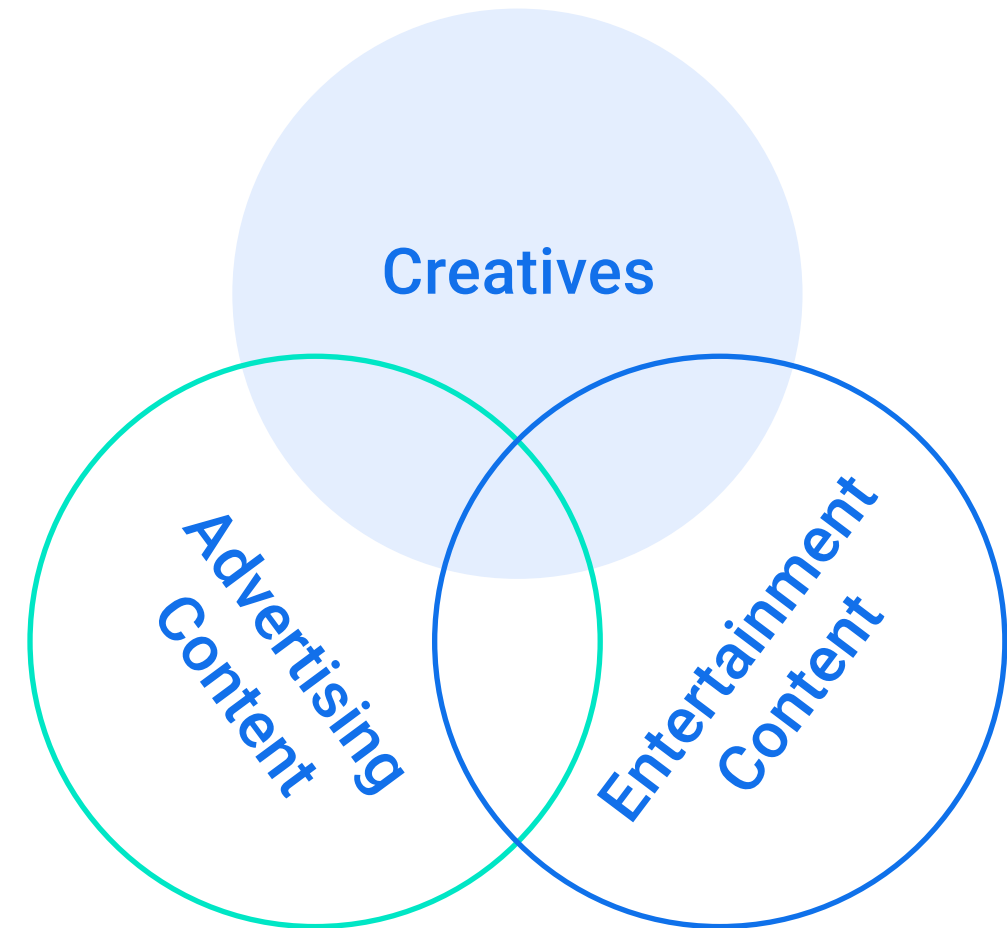
Plan is to solidify this nexus by empowering the creative community

Enterprise clients have diverse content needs:

- **74% of in-house creative teams** were created in the **last 5 years**
- New content for advertising and for entertainment purposes
- Multiple channels with greater pressure on language, cultural and geographic relevance
- Stock content provide high quality, at scale and speed
- Consumers demanding more relevant and content-rich engagement with brands

Enterprises need more efficient ways to engage with Creatives

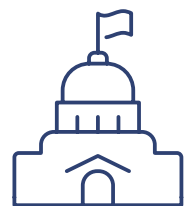
- Payments for completed work are a significant pain-point given KYC/AML issues
- Hard to find people with the right contribution and monitoring is difficult



Our direction of travel



The metaverse is not just a destination, but a whole new way of helping our community thrive



Vertical Banking

2022 addressable market in Europe and the US of 2.2 million and 1.2 million respectively
Using Banking as a Service (BaaS) providers to supply regulated activities in Europe, UK and the US



Jobs Board

Automated platform to connect our vetted community members with jobs and projects being offered by our Enterprise clients
4 launch partners is in beta mode now
Conservative forecasts of 125,000 members working on briefs from 600 clients with an average of c. \$3.6k per brief



Metaverse

We already have real estate in the Sandbox with Animoca and NFT programmes are being developed around art and entertainment assets
We plan to launch at least one metaverse to support creative content galleries and to support e-commerce opportunities for our members as well as to provide a secure method to lock-down creative digital assets



M&A

M&A fits into 2 key categories so far:
a) groups that are similar to our content for marketing services platform and
b) investments that support our metaverse project either related to e-commerce, NFTs, or metaverse hosting and architecture
Current projects double revenue and operating scope and also provide savings in terms of personnel and regional duplicate costs



Acquisition strategy

Successfully completed four acquisitions in last year with two additional closing in this Q2 2022:

- Talenthouse reversed into Talenthouse AG (previously New Value AG) in 2021, along with earlier acquisitions, Zooppa and Ello
- 100% of EyeEm and Jovoto in acquired in 2021, and 33% of Quest
- introducing Creative Commission to our members
- acquired the technology and hiring the team from **Sponsokit** to help drive data analytics

Cross-selling opportunity

We are continuing our integration into a seamless end-to-end creative service offering for our clients

Successful & continuous output of new and compelling content

45 productions were completed in Q1, with 1,933 assets produced and **2.7M new assets** added to the EyeEm Marketplace

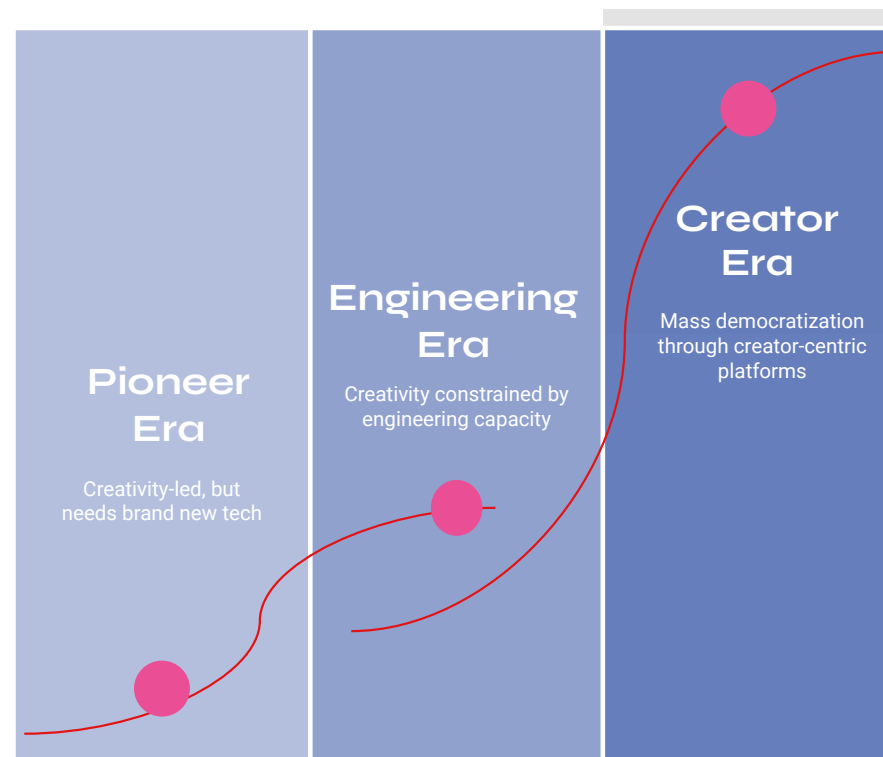
*This figure does not include assets generated for our EyeEm marketplace.

The metaverse - our special skills



We are super excited by the metaverse, not just making our own special version, but the fact that **the metaverse won't exist without graphic artists, particularly motion and 3D-skilled creators**

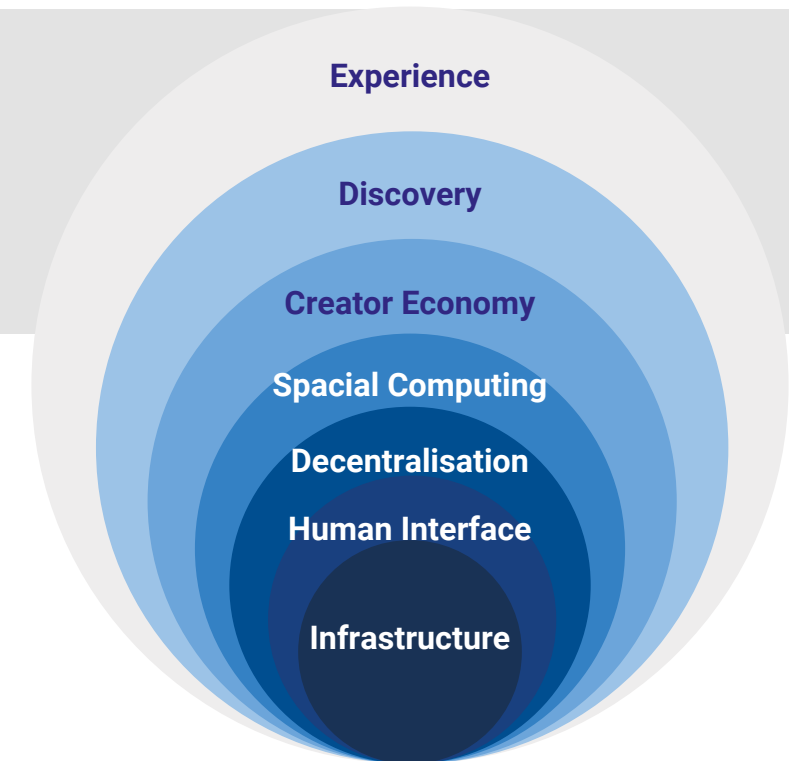
Creator economy evolution



This is Talenthouse

... tapping into an
\$8T market in the digital
economy alone

Layers of the metaverse

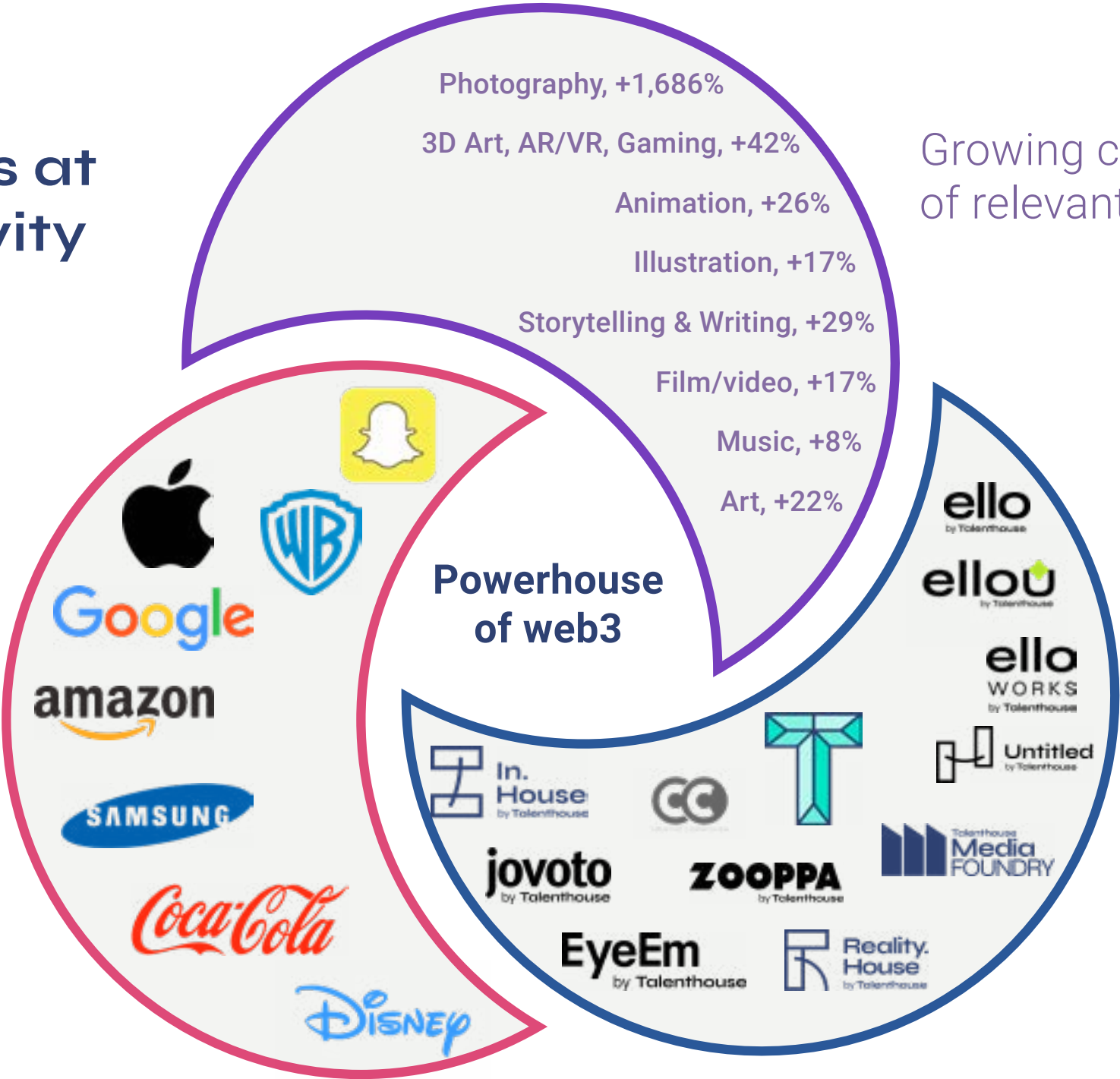


How we win

Position ourselves at the centre of gravity



Delivering unique content to the world's biggest brands



Growing communities of relevant professions

Implementing solutions that enable superior results



The market is going in our
direction ... and fast



Creator economy is huge, global and growing

Growth in visual media for advertising and entertainment is driving global adoption



Global Creator Economy

\$2.8t (trillion)

global revenue in 2020/2021, up from \$2.2t in 2013

100m+ (million)

with 50m identifying as creatives in the Creator Economy in 2020/2021, estimated to be a fraction of those that work in and support the Creator Economy

Europe, APAC and the North America all contribute on average \$700 billion, with the North America being the smallest of the three regions (although higher intensity as a percentage of GDP) with Lat. Am. and Africa making up the rest



Digital Advertising Market

\$491b 2021

expected to grow 18% per year to

\$786b by 2026

Digital Advertising Content: 84% of people expect brands to create content, Videos are shared 1,200% more than text & links combined



Video, Animation & Motion Graphics

\$526b 2020

expected to grow 18% per year to

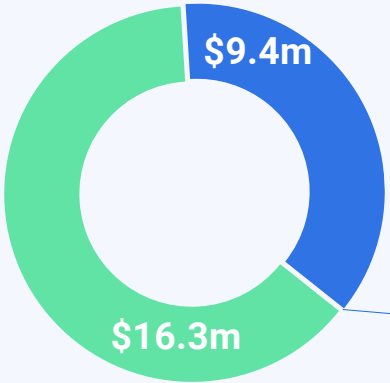
\$846b by 2026

2.7b gamers, with Roblox alone reporting 47m daily active users, 1.1 billion AR users, 1.1 billion cinema tickets sold, & 487 million music streamers in 2021. Video streamers set to hit 1.5b by 2024

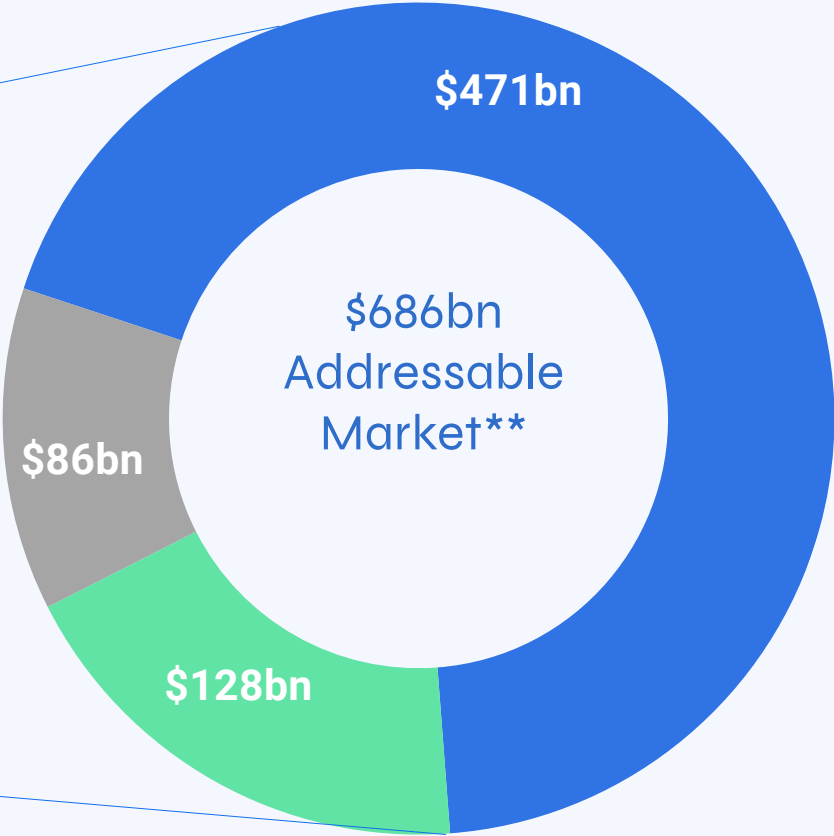
Our revenues vs addressable market




Revenue 2021 including
entertainment: \$25.7m*



Huge addressable
market to grow into



 **Content
Monetization**

 **Content Creation**

 **Community Empowerment***
* revenues starting 2022

* These numbers include Coolabi as if it was 100% owned during the full calendar year 2021; we currently own 33% of Coolabi and intend to complete the acquisition in Q2 2022.

** Source: FrontierView, EY, Unesco

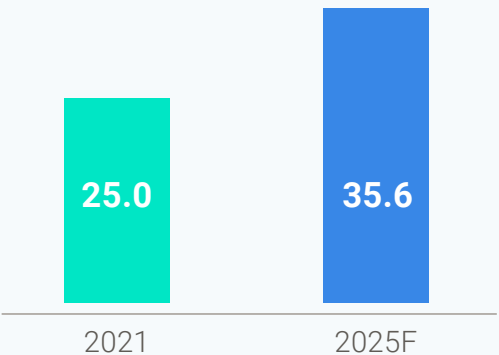
Unprecedented rise in global demand

...for content across platforms and emerging tech

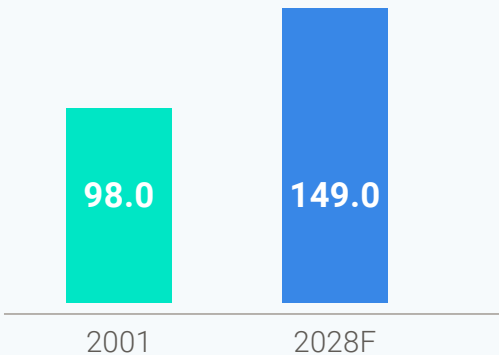


Rise of digital content

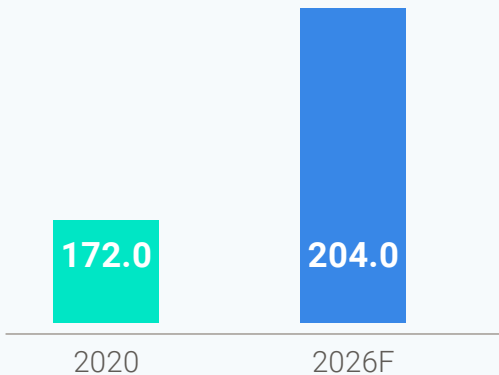
Digital music segment⁽¹⁾
(US\$bn)



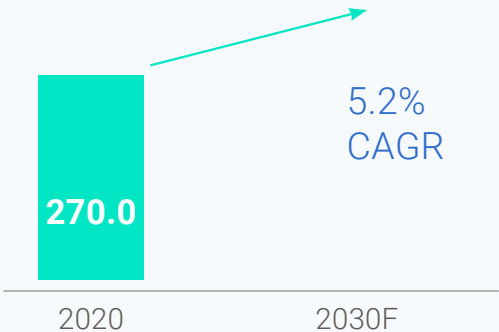
Digital photography⁽²⁾
(US\$bn)



Digital video⁽³⁾
(US\$bn)



Digital animation and motion graphics⁽⁴⁾
(US\$bn)



Sources:

- 1. Statista – Digital Music Worldwide, 2021
- 2. PR Newswire - The Digital Photography - Global Market Outlook (2017-2026), 2019
- 3. imarc - Digital Video Content Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2021-2026, 2021
- 4. Statista - Animation market size worldwide 2017-2020, 2021 / GlobeNewswire - Animation Market Size, 2021



Unprecedented rise in global demand

...for content across platforms and emerging tech



Growth in digital demand is the 'wind in our sails'

Expected growth in:

- Digital games⁵: **+9.6%** CAGR to 2026F
- Video streaming⁶: **+21%** CAGR to 2028F
- Global streaming⁷: **+18%** CAGR to 2024F mpaigns/communication

Rising users and globalisation of content:

- 5G revolution – faster networks, reduced latency, larger capacity
- Internet users⁸ **more than doubled** in last decade
- Global internet users⁹ expected to increase from **51% to 66%** between 2018 and 2023

5. Mordor Intelligence - Gaming Market - Growth, Trends, Covid-19 Impact, and Forecasts (2021 - 2026)

6. Grandview Research - Video Streaming Market Size, Share & Trends Analysis, 2021-2028, 2021

7. PR Newswire, \$ 149.96 Billion growth expected in Online Streaming Services Market | 14.38% YOY growth in 2020 amid COVID-19 Spread, 2021

8. International Telecommunications Union - Statistics, 2021; Statista - Global digital population as of January 2021

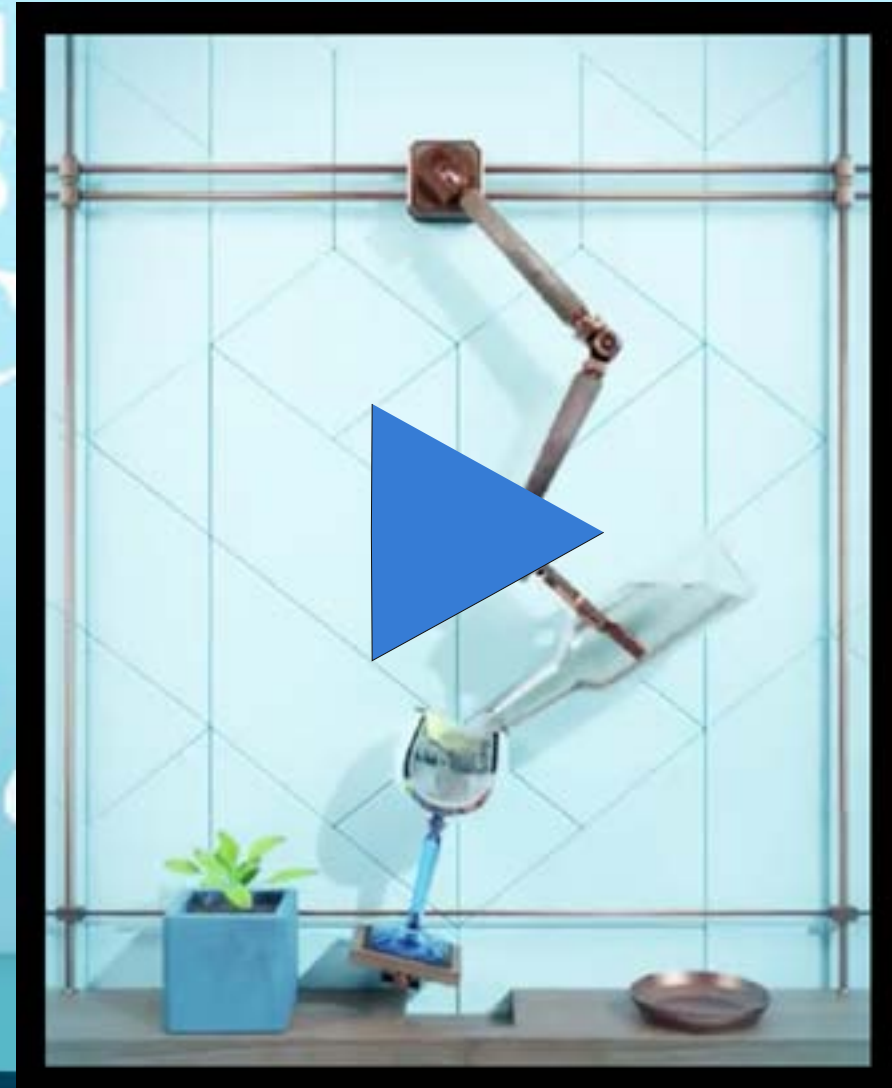
9. CISCO

Performance overview



Bombay Sapphire x Talenthouse

What
will
S
C





Strong 2021 pro forma revenue and EBITDA improvement

Strong growth in revenues, allowing the company to grow gross margins, reduce operating losses and increase its creator payments to \$6.9m

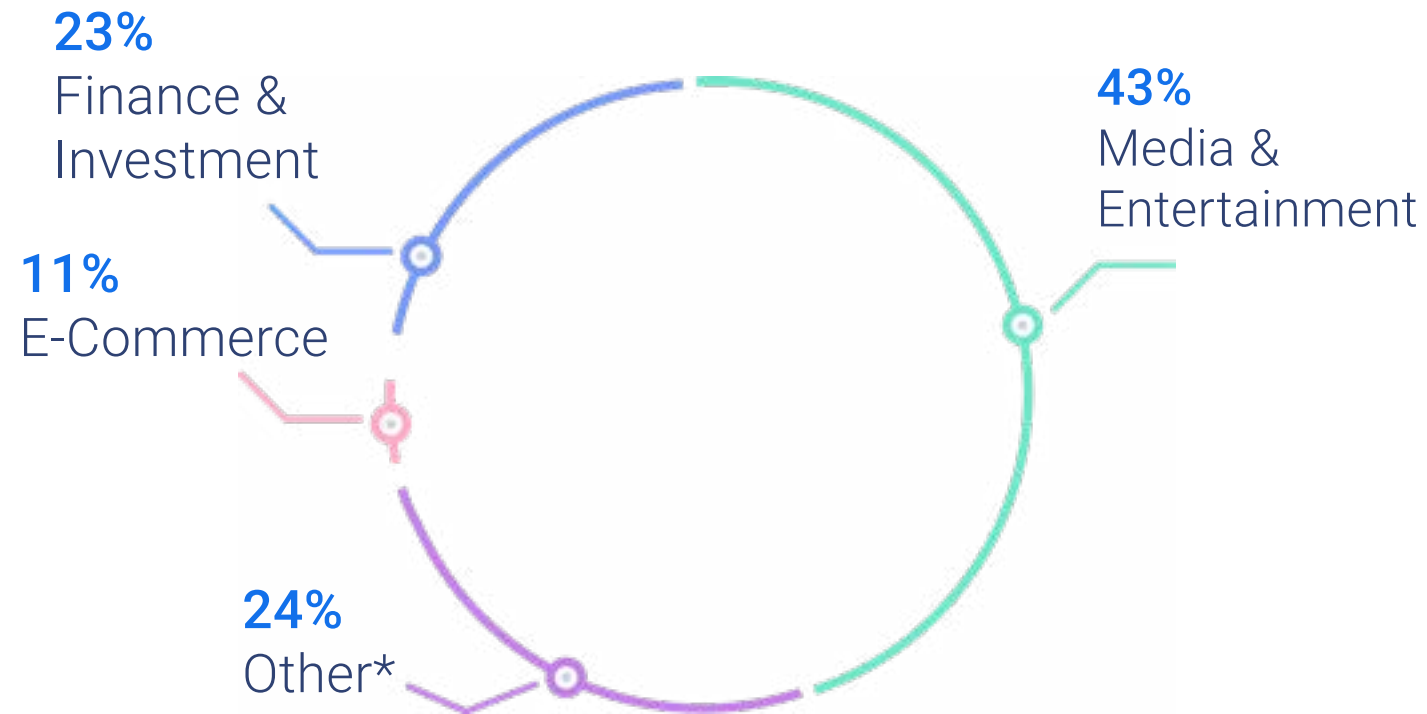
2021 highlights

	Revenue (\$ millions)	Gross Margin (%)	Adjusted EBITDA (\$ millions)
Proforma (including entertainment revenue from Coolabi*)	\$25.7m (+34% yoy)	69%	\$0.7m \$(7.6)m in 2020
Proforma (excluding entertainment revenue from Coolabi**)	\$14.7m (+32% yoy)	52%	\$(4.9)m \$(11.8)m in 2020
\$6.9m Payments to Creatives vs \$5.2m in 2020			

* Including Coolabi as if it was 100% owned during the full calendar year 2021; we currently own 33% of Coolabi and intend to complete the acquisition in Q2 2022.

** Unaudited 2021, pro forma for calendar year end and combination of group companies not owned until 2021

Revenue by industry



Strong initiatives toward **new media and technology** clients (e.g. Snap) are paying off with 'land and expand' being highly visible success with such clients

Fintech and finance clients are also showing strong traction this quarter

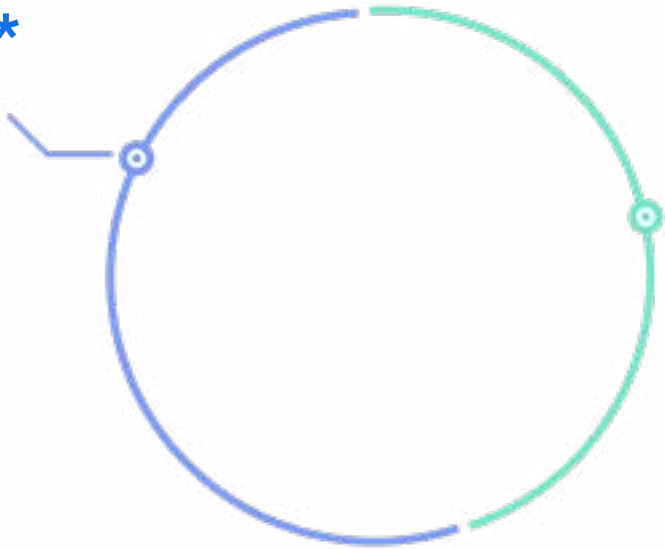
We are realising our message that **creativity is relevant for all industries**, but some industries are more open to change than others

Key revenue lines driving the business



Content Monetization

53%*



Content Creation

47%

Content Creation & Content Monetization

Content creation and content monetization have been key revenue lines historically with revenue growth coming from our expansion strategy with key clients. We saw the shift in Q1 and balance in the growth of content creation versus content monetization. This is very much dependent on the seasonality of the content licensing part of our business.

Community Empowerment

Community empowerment kicked started in Q1 2022 with the technical developments of three key products; ElloU, ElloWorks, and Media Foundry. These three products will super charge the growth initiatives for our third revenue line for Talenthouse, without the usual customer acquisition costs associated as we have the customer (the Creative) already onboarded to one of the Talenthouse platforms.

* This includes Coolabi and our licensing revenue. These unaudited numbers include Coolabi as if it was 100% owned; we currently own 33% of Coolabi and intend to complete the acquisition in Q2 2022

Our M&A history

Acquisitions to date have been conservatively priced (even when considering the current market conditions) and determination of valuation is different depending on type:

- › **Content IP** opportunities such as Coolabi tend to be driven off of EBITDA multiples, while
- › **Platform**-oriented opportunities are driven by GM for the most part

Talenthouse Acquisition Experience		Rev x 2021	GM x 2021	EBITDA x 2021
Coolabi	Content/IP	5.5 x	5.7 x	9.9 x
Jovoto	Platform	2.5 x	3.6 x	nmf
EyeEm	Platform	0.9 x	2.2 x	nmf
Creative Commissions	Platform	2.0 x	2.0 x	nmf
TH Acquisitions		3.5 x	2.7 x	nmf

Private M&A market

M&A transaction multiples over 11 years provides some interesting perspective

- › **Content IP** opportunities tend to trade at c. **25x EBITDA**, but also shows strong correlation on **revenue multiples** of c. **7.4x** (given EBITDA is not always reported, and gross margin, almost never reported). Notable recent examples include Moonbug (2-5 year old demographic) acquired by a Blackstone SPV, traded at c. 30x revenue
- › **Platform**-oriented opportunities tend to trade at c. **12.7x revenue**, and when reported, at c. **29x EBITDA**. Notable examples in particular include WattPad, Radish Media and Tapas Media. These companies acquired less than a year ago traded for 15x, 17.7x and 18.2x trailing revenue

Dataset is inherently incomplete, as it is not possible to have every relevant private deal logged and sources are not always consistent, however, the data is directionally indicative of these overall valuation trends

Public markets paint a confusing picture



We don't have direct comparables, but we have some perspective to share that may help enlighten the discussion

Technology platforms

Direct comparables are hard to pinpoint given Talenthouse's unique take on the market, but acquisitive platform companies such as S4 Capital and Keyword Studios as well as the recently listed Zoo Digital provide some scope for comparison. Getty Images is also comparable, although not one that easily fits, but it is still in the merger process with a US SPAC.

This group of stocks **lost 27%** of its market capitalisation over the past year, and 30% in the last 6 months alone

Content IP and library revenue

Other than the large highly diversified brands like Disney, suitable proxies are hard to find. The likes of Tinybuild in the UK, Shutterstock in the US and Wildbrain in Canada provide a reasonable basis of IP ownership, diverse brand revenue and international scope

This group of stocks **lost 23%** of its market value in the last year, nearly all attributable to the last 6 months. Unlike the private market, public deals in this space trade exclusively on EBITDA margin, and at current

prices that is c. **12.7x** trailing. This coincides with GP Bullhound's 31 March 2022 Digital Media Indices for music, video and photos of **12x**. As is clear, the private market multiples diverse considerably to the public market comparables in this category

Jobs platforms

The likes of Fiverr, Freelancer and Upworks are the leading platforms to secure work between companies seeking freelance support for projects and the freelancers who are willing to apply

Unfortunately this group of companies have lost **75%** of their collective market value in the past year, **36%** in the last 6 months alone

Although this is not a material source of revenue for Talenthouse currently, we expect to offer these services between our community and clients

Valuation environment

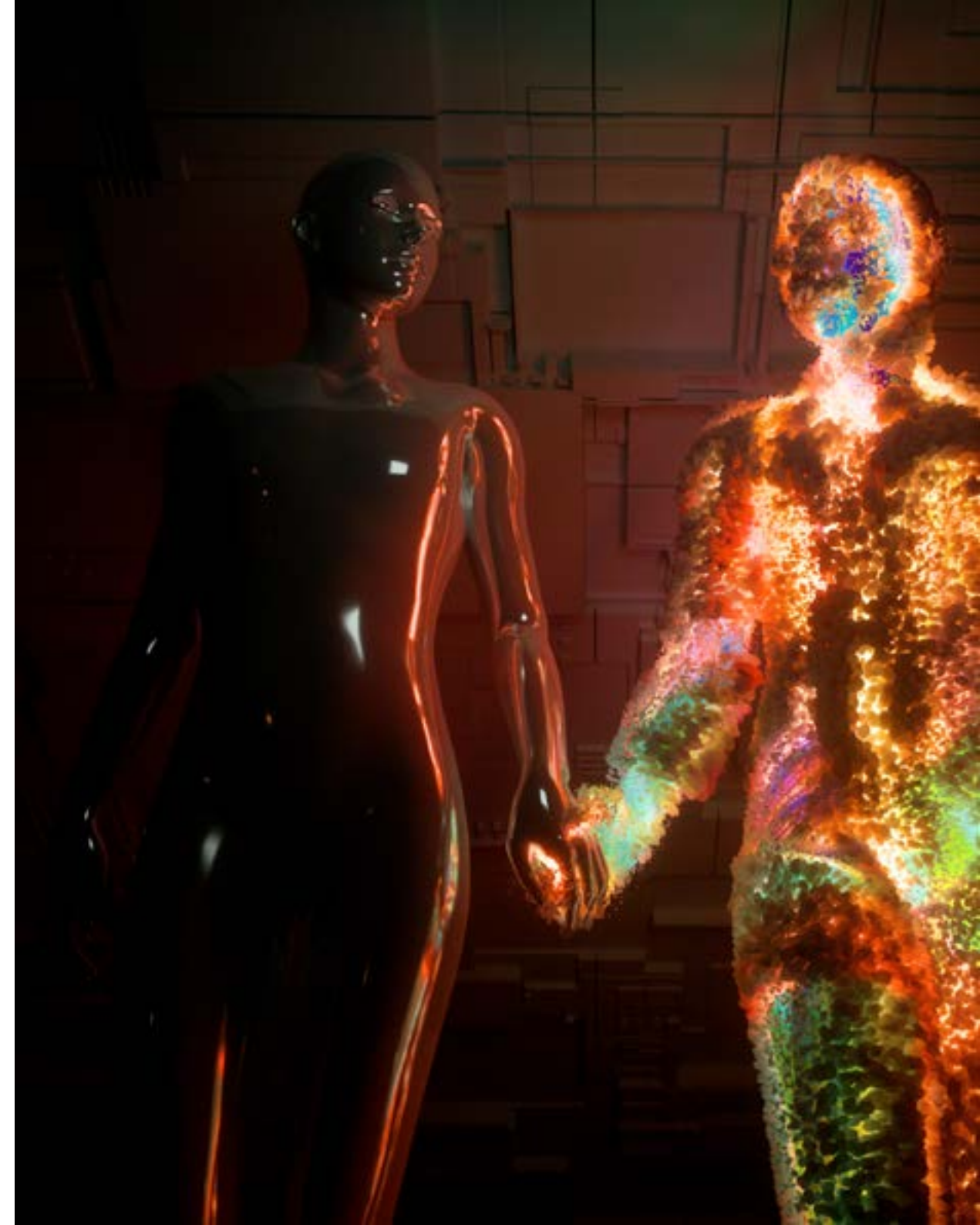
Key takeaways

Current market valuations are severely depressed, **but not as much in our core technology platform and content IP segments**

Private market deals continue apace, with the Pond5 acquisition announcement by Shutterstock, as an example. We recommend a flick through GP Bullhound's report to get some further perspective

Given the continued **strong growth in digital advertising and the platform wars** between the majors, the core drivers for Talenhouse continue to suggest a continuation of growth opportunities

We believe that the Talenhouse valuation offers a significant upside by all meaningful metrics



Performance summary

Q2 2022 booked sales to date (not yet invoiced) are 2x compared to the same period last year. H1 sales averaged 36% of annual sales over the past 2 years, indicating not only quarterly variations, but 6-monthly variations as well

Investment in growth is complemented by **reductions in overhead** through integration and efficiency (i.e. successful cost rationalisation to support growth expenditures)

Acquisitions will continue to feature in group development as we selectively partner with quality platforms to accelerate growth



We were born out of a need for change

We want to make the creative industry more inclusive.





Artist: @mzaas, EyeEm Community

ArtsHelp x Talenthouse



Exciting new collaboration awarding \$3.5M to insight change towards climate action

Brief 1 of 3

68k

Brief Views

11k

Editorial Page Views

265k

Social media impressions

160

Submissions

Q1 saw the launch of Talenthouse AG's seminal partnership with Arts Help, as we teamed up to distribute \$3.5m to fund inspiring work from our creative community. The opening of the first round of grant applications was an iterative exercise which has allowed us to refine the application process for the second round of funding, which opened in April '22.

The second brief has over 1,000 submissions to date with 2 more weeks to run.

Our people & commitment to social impact

To build a sustainable and inclusive organisation that uses creativity as a force for good

We care for mental health - We've implemented a collaboration with Nilo Health, in order to offer mental illness resources to our team, across the globe

Hybrid work - We are back to hybrid working, increasing touchpoints between team members, and generating more opportunities through events and workshops for talent inclusion

- **Training talent development** 1,160 hours in Q1

- **Adding talent:** 24 heads (20.7 FTE)

Rewarding our community in Q1 manifests itself in the launch of the Creative Trends Initiative, where we will be launching multiple briefs throughout the year offering new opportunities for revenue, the first one, which was completed in Q1 offered \$10,000 to 20 Creatives selected for our "localised perspectives" brief



ElloWorks

We've launched our new product, ElloWorks, which allows creatives to engage directly with clients through our platform. We are encouraging growth and pushing for career progression by letting their design choices directly in their hands. Also, we are generating revenue and have the first happy customers

25

hot leads

9k

total page sessions

\$0

marketing budget spent -
all organic growth

Some of the first key users:



Azar



ElloWorks x Ukraine

We've launched in Q1 е-Креатив, or e-Creative in English. This is a not for profit collaboration for creatives translating to "there is creative work". The first client was **TryNoAgency** and the first payments to Creatives have already been processed



Example of our content monetization in action

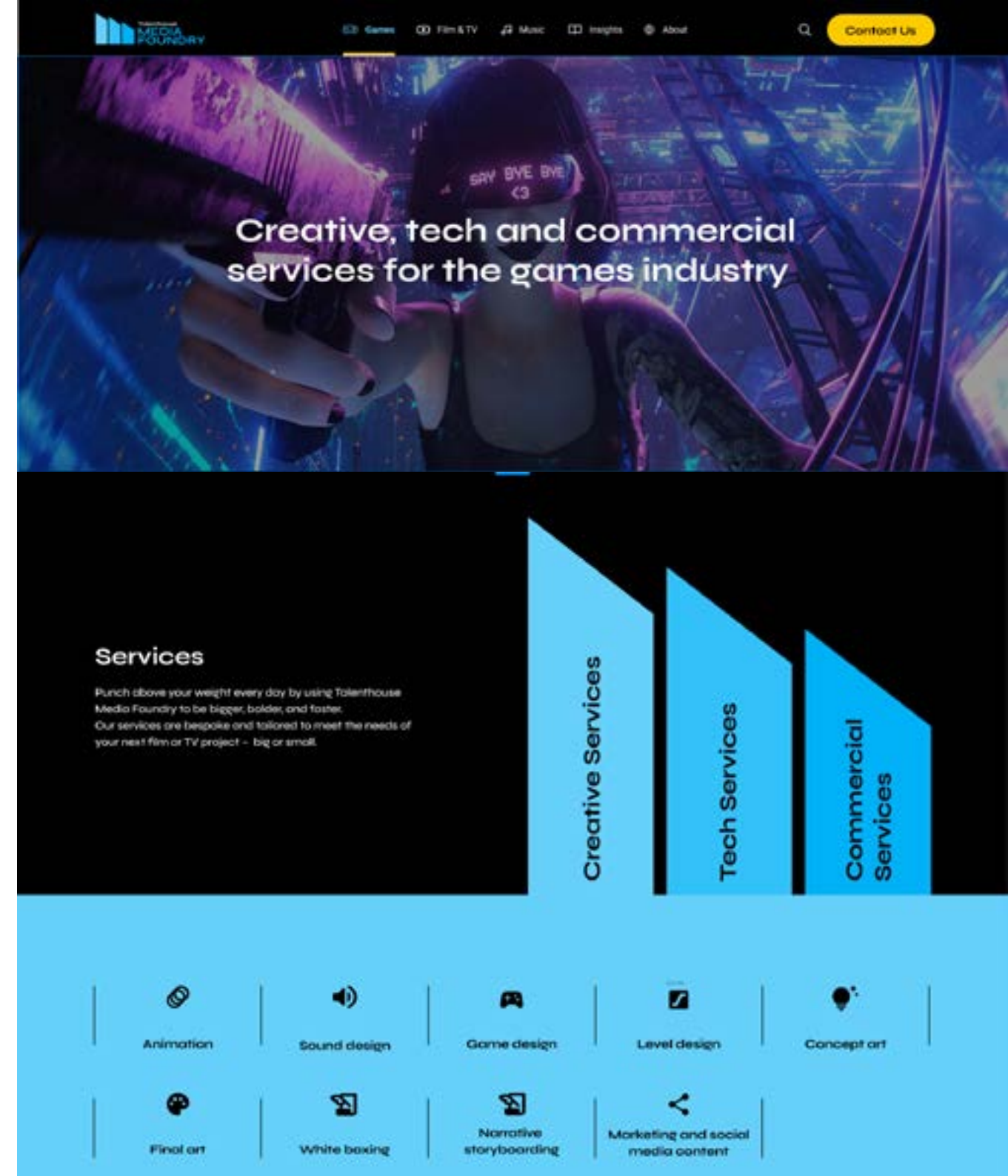
Media Foundry provides scalable access to the skilled creative resources needed to:

plan --- produce --- execute

Entertainment Creative's work without limiting their freedom

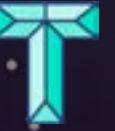
The veteran team and **access to the Talenthouse community** of creatives globally provides a unique and innovative approach to project development

Resources, tools and data specific to each Entertainment vertical are accessed from the home page providing paid for services, thought leadership and a wealth of industry knowledge to support and nurture independent entertainment Creatives





Goldfinch x Talenthouse



Constellation of creativity

Thanks to acquisitions and product development, Talenthouse comprises 11 synergistic platforms - **the most comprehensive platform for the Creator Economy** - delivering end-to-end integrated creative services to clients globally





#Wearetalenthouse

Q & A