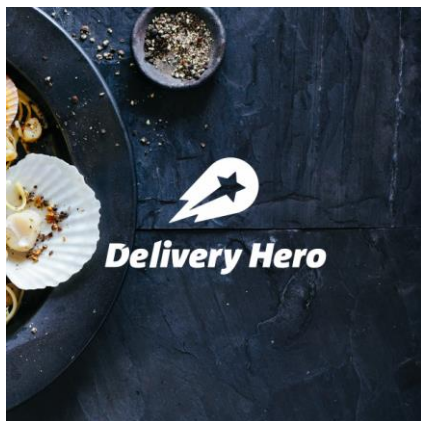
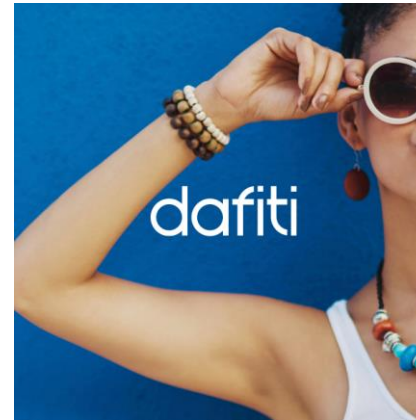


# H1 2018 Results for Rocket Internet Group & Selected Companies

20 SEPTEMBER 2018



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# Agenda

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## Topic

## Presenter

H1 2018 Results for Rocket Internet & Selected Companies

**Peter Kimpel**  
*CFO*

Summary Remarks

Oliver Samwer  
*Founder and CEO*

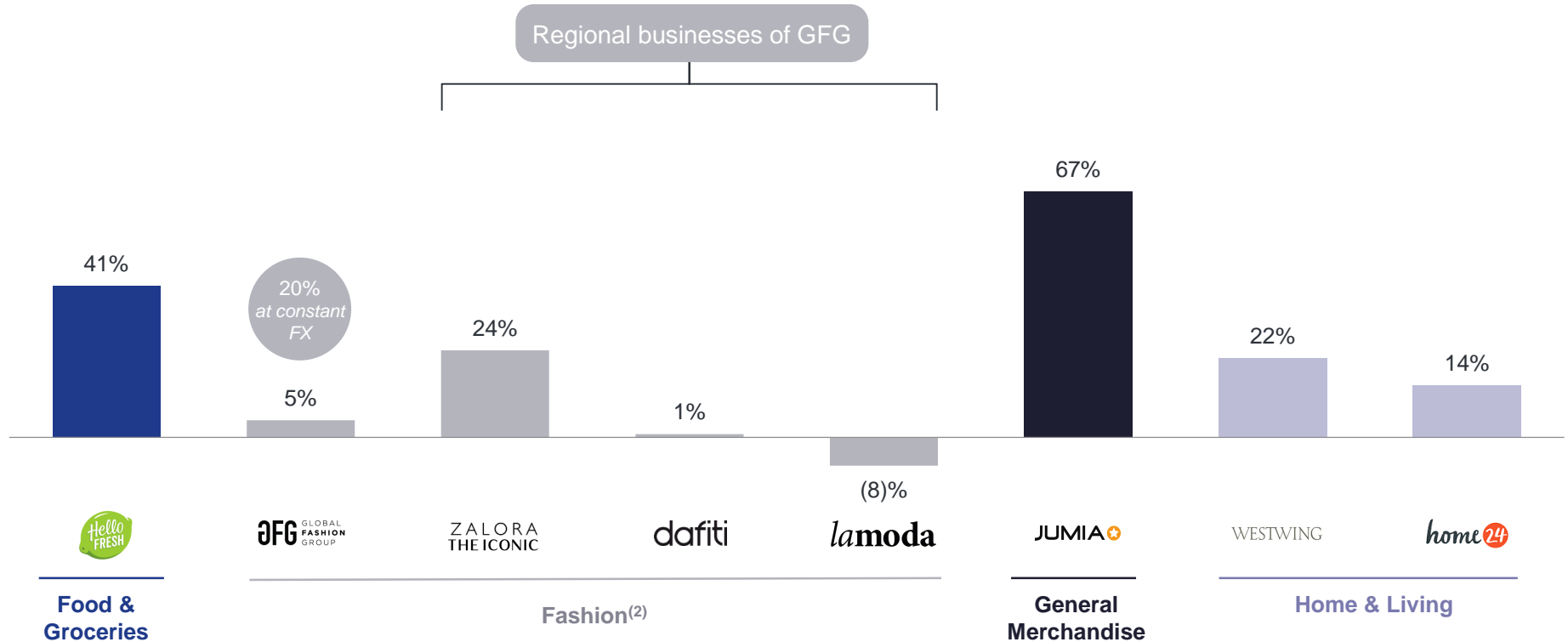
# Rocket Internet's Selected Companies

Public Companies	
Food & Groceries	 36%  6%
Home & Living	 33%
Privately Held Companies	
Fashion	 20%
General Merchandise	 28%
Home & Living	 32%

Note(s): Percentage indicates Rocket Internet's economic ownership held directly as well as indirectly, including beneficial interest through the Rocket Internet Capital Partners fund where applicable, stated as of August 31, 2018.

# Continued Topline Growth

## Topline<sup>(1)</sup> Growth H1 2017 – H1 2018

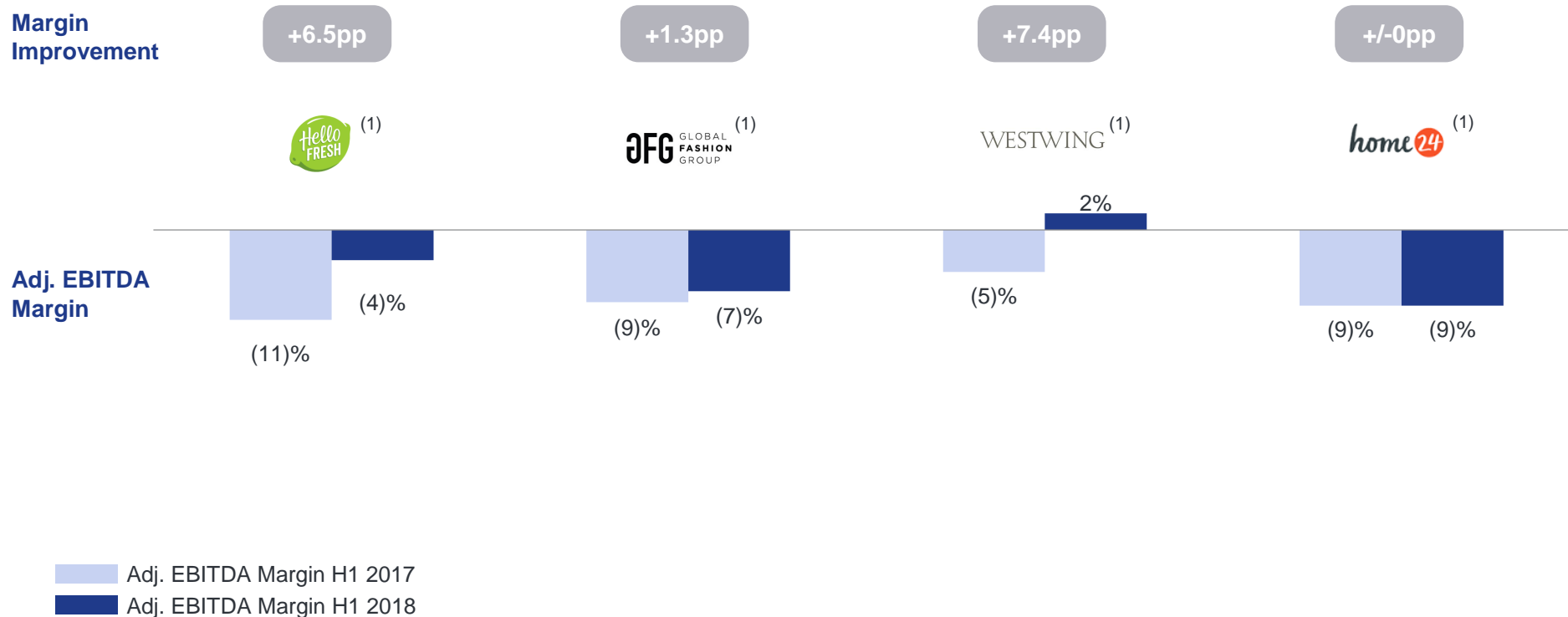


Source: Unaudited consolidated financial information based on IFRS and management reports of HelloFresh, GFG, Jumia, Westwing and home24. Please refer to the appendix for detailed information.  
 Note(s): Rocket Internet does not have control over the network companies shown above. The actual legal and economic interest of the group in the network companies shown above ranges between 20% (GFG) and 36% (HelloFresh).

(1) Revenue growth; for Jumia: GMV growth.

(2) Zalora & The Iconic, Dafiti and Lamoda are regional businesses of GFG. Only Zalora & The Iconic, Dafiti and Lamoda are included in GFG's group numbers (excluding Namshi).

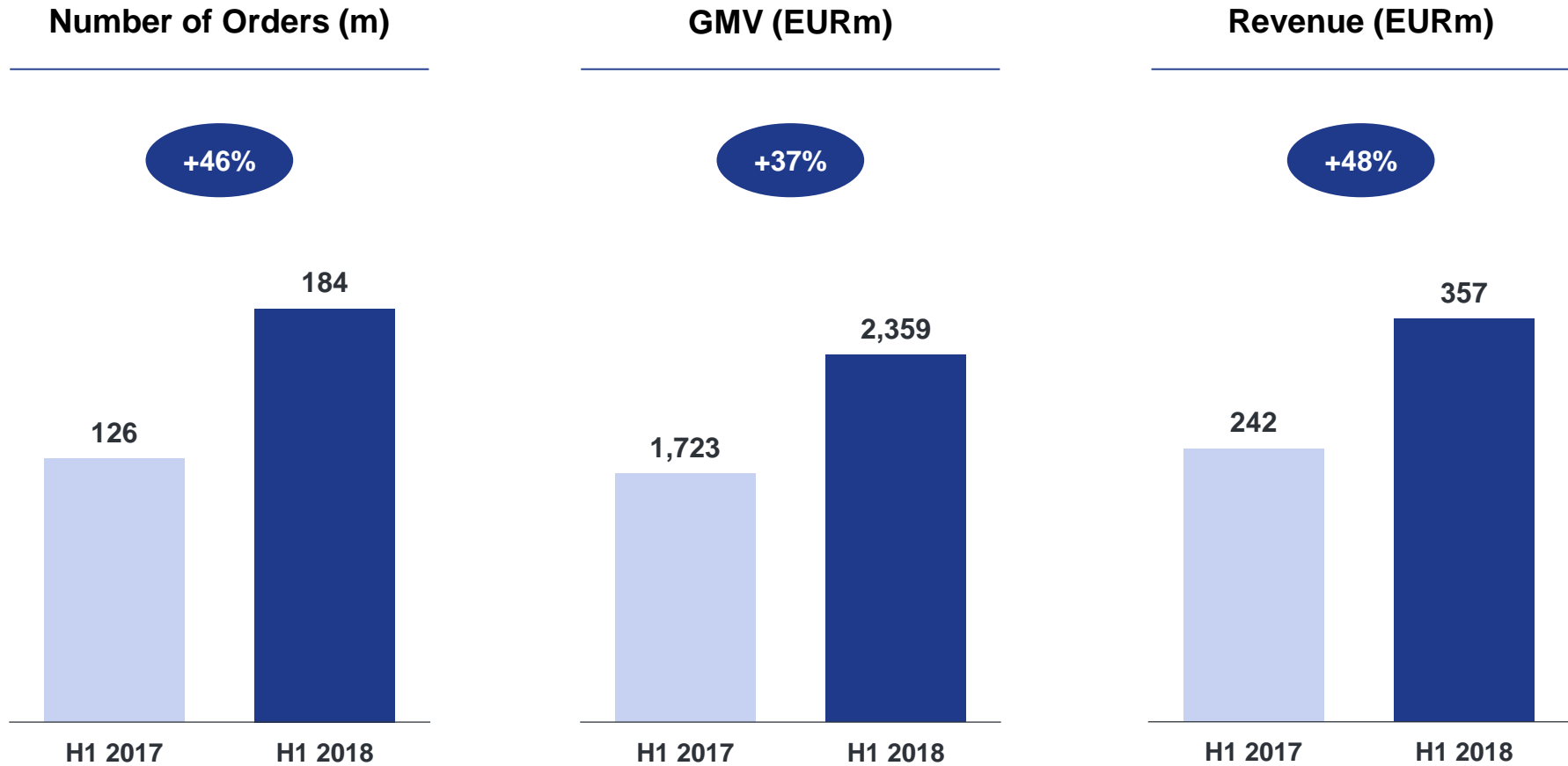
# Adj. EBITDA Margins Improved Significantly at Selected Companies



Source: Unaudited consolidated financial information based on IFRS and management reports of HelloFresh, GFG, Westwing and home24. Please refer to the appendix for detailed information.  
 Note(s): Rocket Internet does not have control over the network companies shown above. The actual legal and economic interest of the group in the network companies shown above ranges between 20% (GFG) and 36% (HelloFresh).

(1) HelloFresh, GFG, Westwing and home24 are also adjusted for certain non-recurring items. GFG excluding Namshi.

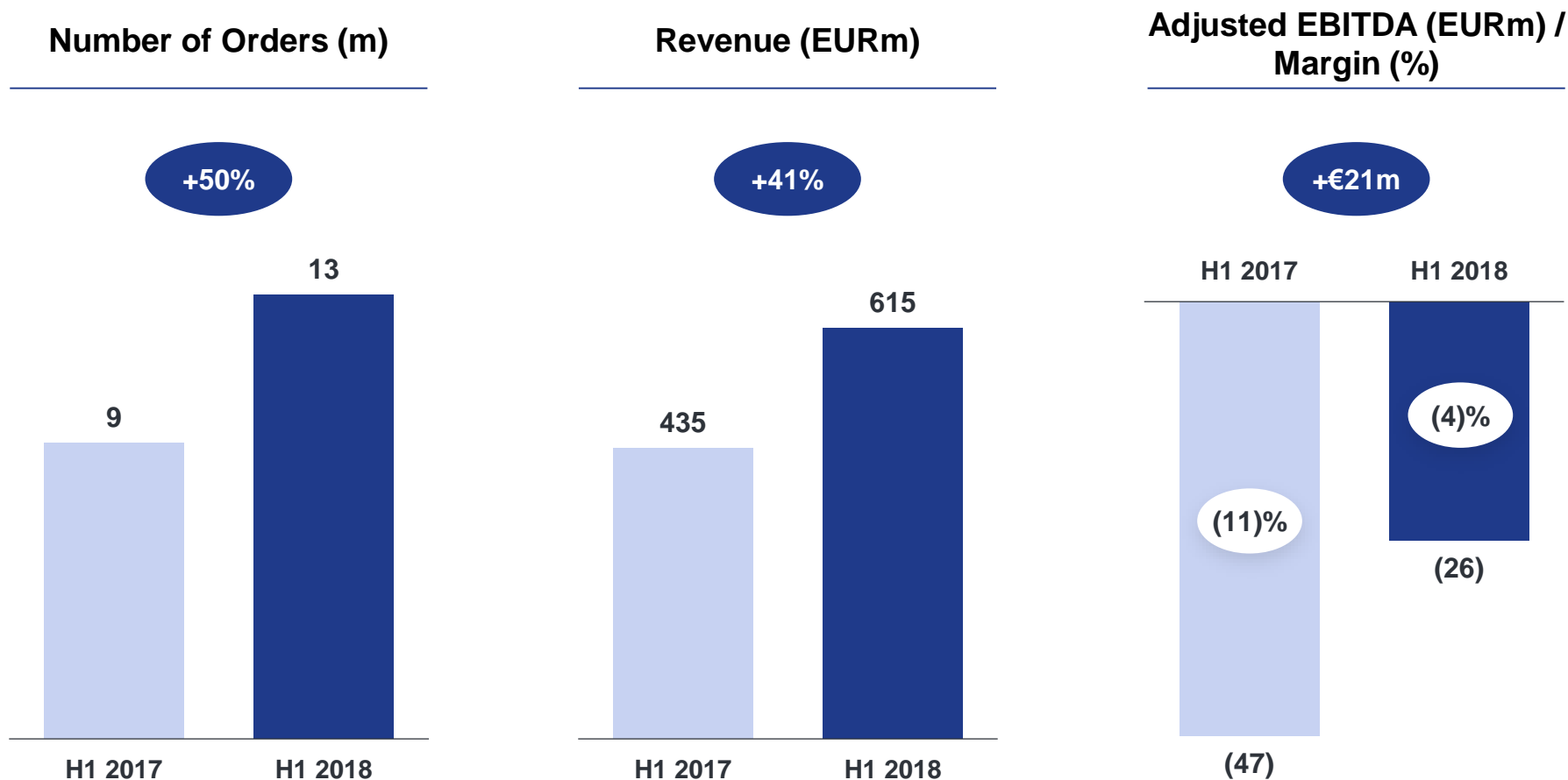
# Delivery Hero Continues to Deliver Strong Growth in H1 2018



Source: Delivery Hero H1 2018 financial report.

Note(s): Rocket Internet's economic ownership, as of August 31, 2018: 6%.

# HelloFresh Continues to Grow in H1 2018 While Approaching Break-Even



Source: HelloFresh H1 2018 financial report.

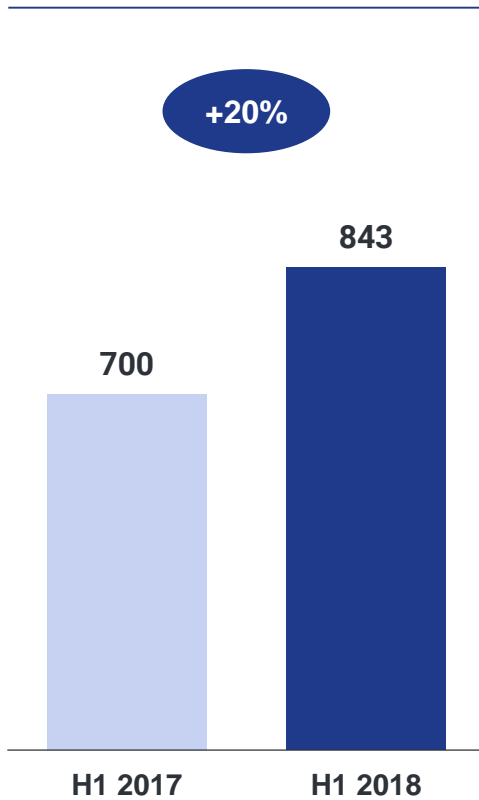
Note(s): All figures include Green Chef, acquired in March 2018. Rocket Internet's economic ownership as of August 31, 2018: 36%.



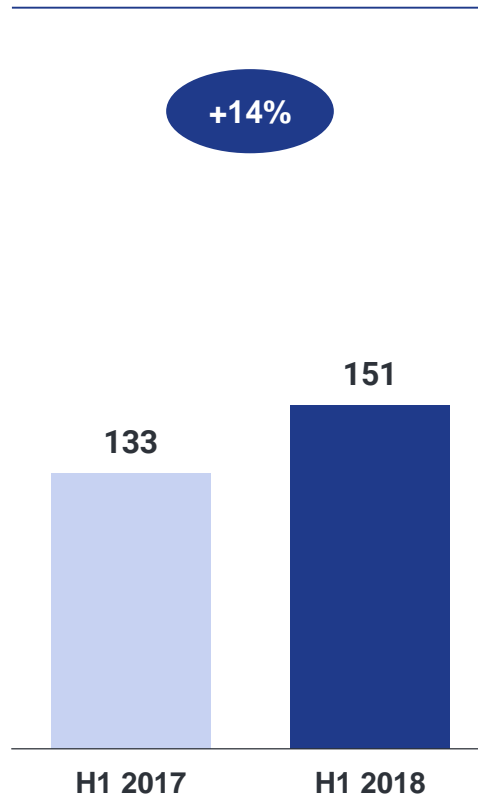
# home24 Continues to Grow Post IPO



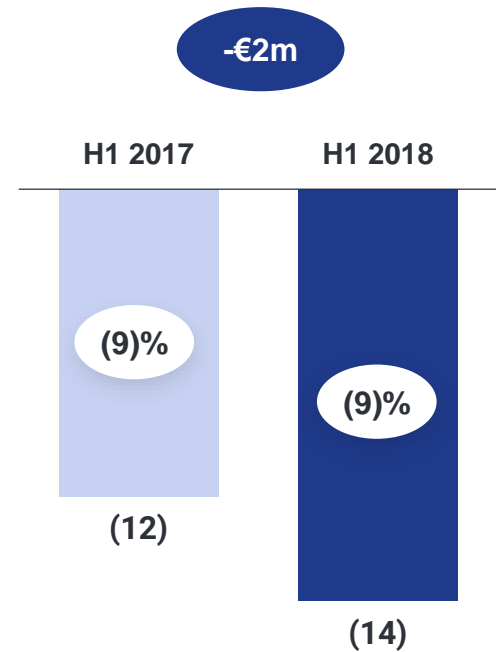
Number of Orders (k)



Revenue (EURm)



Adjusted EBITDA (EURm) / Margin (%)



Source: home24 H1 2018 financial report.  
 Note(s): Rocket Internet's economic ownership as of August 31, 2018: 33%.

# Global Fashion Group (GFG)

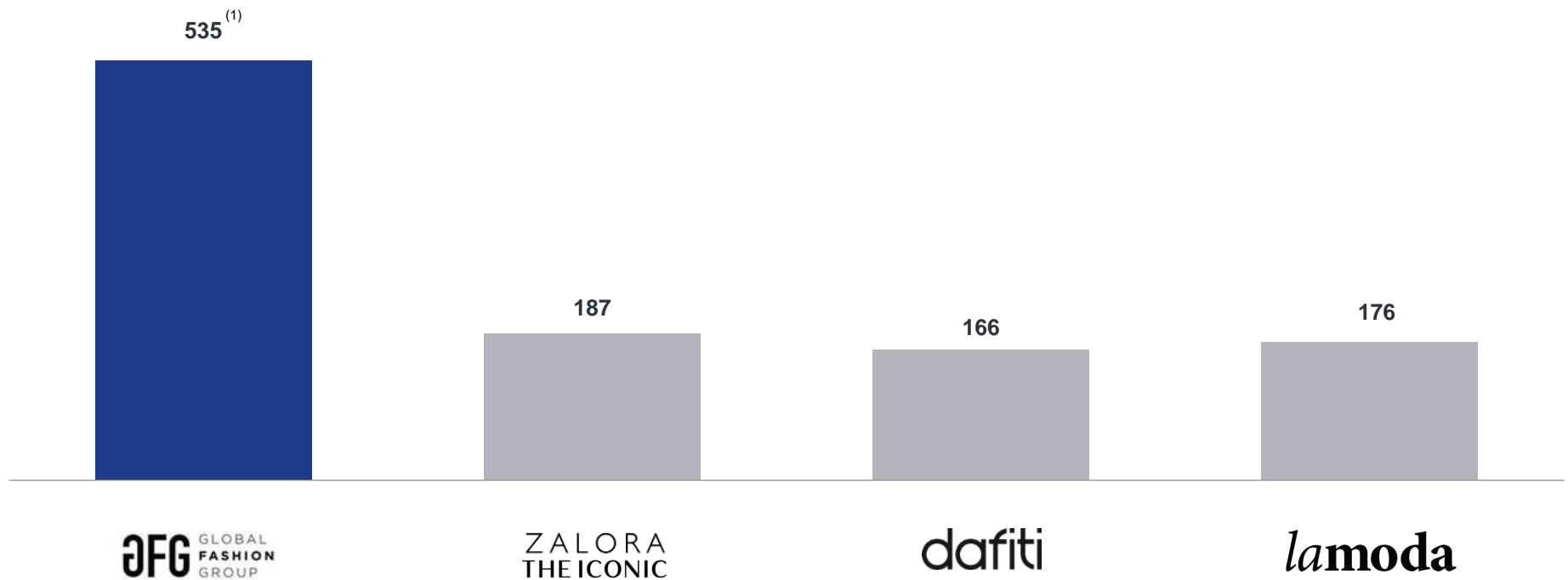


ZALORA  
THE ICONIC

dafiti lamoda

## H1 2018 Revenue

EURm



Source: GFG's unaudited consolidated financial information based on IFRS.

Note(s):

(1) GFG's consolidated Revenue; differences relative to sum-of-the-parts are due to eliminations, holding and other.

# GFG Consolidated Financials

Excl. Namshi for all presented periods

**GFG** GLOBAL FASHION GROUP

ZALORA  
THE ICONIC

dafiti lamoda

EURm	Q2 2017	Q2 2018	H1 2017	H1 2018
<b>Revenue</b>	<b>281.9</b>	<b>297.8</b>	<b>510.6</b>	<b>534.7</b>
% Growth YoY (FX neutral pro-forma) <sup>(1)</sup>		21.1%		19.6%
% Growth YoY (EUR)		5.6%		4.7%
<b>Gross Profit</b>	<b>120.7</b>	<b>127.7</b>	<b>207.4</b>	<b>215.3</b>
% Margin	42.8%	42.9%	40.6%	40.3%
<b>Adj. EBITDA<sup>(2)</sup></b>	<b>(12.1)</b>	<b>(6.8)</b>	<b>(43.9)</b>	<b>(39.1)</b>
% Margin	(4.3)%	(2.3)%	(8.6)%	(7.3)%
<b>Cash Position (pro-forma)<sup>(3)</sup></b>			<b>271.3</b>	<b>163.5</b>
<b>NMV</b>	<b>292.1</b>	<b>314.1</b>	<b>527.9</b>	<b>561.1</b>
% Growth YoY (FX neutral pro-forma) <sup>(1)</sup>		23.5%		21.9%
% Growth YoY (EUR)		7.5%		6.3%
<b>Total Orders (m)</b>	<b>6.6</b>	<b>8.5</b>	<b>12.1</b>	<b>14.8</b>
% Growth YoY		28.8%		22.3%
<b>Active Customers (LTM, m)</b>			<b>9.2</b>	<b>10.6</b>
% Growth YoY				15.2%

## Key Performance Drivers

### Financial

#### Revenue/ NMV

- Group Net Revenue for the quarter was EUR 297.8m, representing constant currency pro-forma growth of 21.1%, or 5.6% growth in absolute Euro terms.
- NMV, which includes Marketplace sales, for the quarter was EUR 314.1m, growing 23.5% on a constant currency pro-forma basis.

#### Profitability

- Adjusted EBITDA margin improved to (2.3)% of Net Revenue for the quarter, an improvement of 2.0 percentage points from the equivalent period last year.

#### Ownership

- Rocket Internet's economic ownership: 20%<sup>(4)</sup>

### Operational

- During the quarter, Lamoda further developed their assortment in adjacent categories along with further enhancing their offering in the Premium category.
- Despite a national truck drivers strike in May, which halted the Brazilian road network for over one week, Dafiti delivered constant currency growth in Net Revenue and NMV for the quarter of 19.8% and 16.7% respectively.

Source: GFG's unaudited consolidated financial information and unaudited management reports. Please refer to the appendix for detailed information.

Note(s): Namshi accounted for at-equity

(1) Growth rate is shown on a constant currency basis and therefore excludes the effect of foreign currency movements. For the purpose of comparison, growth rates are shown on a pro-forma basis.

(2) Adjusted for share-based compensation expenses, impairment losses and non-recurring items.

(3) Cash position is shown on a pro-forma basis including all outstanding proceeds from closed transactions, where relevant.

(4) Economic ownership includes stakes held directly as well as indirectly, including beneficial interest through RICP (where applicable).

EURm	Q2 2017	Q2 2018	H1 2017	H1 2018
<b>Revenue</b>	<b>86.2</b>	<b>110.2</b>	<b>151.1</b>	<b>186.9</b>
<i>% Growth YoY (FX neutral)<sup>(1)</sup></i>		36.2%		33.8%
<i>% Growth YoY (EUR)</i>		27.8%		23.7%
<b>Gross Profit</b>	<b>34.9</b>	<b>39.9</b>	<b>61.3</b>	<b>68.4</b>
<i>% Margin</i>	40.5%	36.2%	40.6%	36.6%
<b>NMV</b>	<b>93.1</b>	<b>120.8</b>	<b>162.0</b>	<b>205.5</b>
<i>% Growth YoY (FX neutral)<sup>(1)</sup></i>		39.0%		38.2%
<i>% Growth YoY (EUR)</i>		29.8%		26.9%

## Key Performance Drivers

### Financial

#### Revenue/ NMV

- Net Revenue for the quarter was EUR 110.2m, a 36.2% growth from last year on a constant currency basis. NMV of EUR 120.8m, grew by 39.0%, again on a constant currency basis.

#### Profitability

- Gross Profit margin declined by 4.3 percentage points to 36.2%, driven by strategic discounting at Zalora to clear old season stock.

Source: GFG's unaudited consolidated financial information and unaudited management reports. Please refer to the appendix for detailed information.

Note(s):

(1) Growth rate is shown on a constant currency basis and therefore excludes the effect of foreign currency movements.

EURm	Q2 2017	Q2 2018	H1 2017	H1 2018
<b>Revenue</b>	<b>92.2</b>	<b>90.9</b>	<b>164.6</b>	<b>166.1</b>
<i>% Growth YoY (FX neutral)<sup>(1)</sup></i>		19.8%		21.7%
<i>% Growth YoY (EUR)</i>		(1.4)%		0.9%
<b>Gross Profit</b>	<b>41.8</b>	<b>39.9</b>	<b>72.1</b>	<b>70.6</b>
<i>% Margin</i>	45.3%	43.9%	43.8%	42.5%
<b>NMV</b>	<b>99.4</b>	<b>96.1</b>	<b>176.7</b>	<b>174.7</b>
<i>% Growth YoY (FX neutral)<sup>(1)</sup></i>		16.7%		18.7%
<i>% Growth YoY (EUR)</i>		(3.3)%		(1.1)%

## Key Performance Drivers

### Financial

#### Revenue/ NMV

- Net Revenue for Dafiti was EUR 90.9m for the quarter, growing 19.8% YoY on a constant currency basis.
- Continued depreciation of Brazilian Real resulted in absolute Euro Net Revenue and NMV declining by 1.4% and 3.3% YoY, respectively.

#### Profitability

- Gross Profit margin declined YoY by 1.4 percentage points in the quarter to 43.9%, driven by further price investments across the region.

Source: GFG's unaudited consolidated financial information and unaudited management reports. Please refer to the appendix for detailed information.

Note(s):

(1) Growth rate is shown on a constant currency basis and therefore excludes the effect of foreign currency movements.

EURm	Q2 2017	Q2 2018	H1 2017	H1 2018
<b>Revenue<sup>(1)</sup></b>	<b>101.3</b>	<b>94.5</b>	<b>190.5</b>	<b>175.8</b>
% Growth YoY (FX neutral pro-forma) <sup>(1)(2)</sup>		8.9%		5.4%
% Growth YoY (EUR) <sup>(1)</sup>		(6.7)%		(7.7)%
<b>Gross Profit<sup>(1)</sup></b>	<b>44.0</b>	<b>47.0</b>	<b>73.6</b>	<b>74.7</b>
% Margin <sup>(1)</sup>	43.4%	49.7%	38.6%	42.5%
<b>NMV</b>	<b>99.7</b>	<b>97.3</b>	<b>189.2</b>	<b>180.9</b>
% Growth YoY (FX neutral pro-forma) <sup>(2)</sup>		14.9%		10.1%
% Growth YoY (EUR)		(2.4)%		(4.4)%

## Key Performance Drivers

### Financial

#### Revenue/ NMV

- Lamoda's Net Revenue was Euro 94.5m for the quarter and delivered constant currency growth of 8.9%.
- NMV grew to Euro 97.3m, supported by strong Marketplace performance, with a key focus to onboard more footwear and clothing suppliers, and delivered a constant currency growth of 14.9%.

#### Profitability

- Gross Profit margin improved by 6.3 percentage points to 49.7%, which includes the benefit of a one-off supplier bonus.

Source: GFG's unaudited consolidated financial information and unaudited management reports. Please refer to the appendix for detailed information.

Note(s):

(1) For the purpose of comparison, the Lamoda results have been restated to remove its private label, following an internal corporate restructuring.

(2) Growth rate is shown on a constant currency basis and therefore excludes the effect of foreign currency movements. For the purpose of comparison, growth rates are shown on a pro-forma basis.

EURm	Q2 2017	Q2 2018	H1 2017	H1 2018
<b>GMV</b>				
In variable currency FX rate	100.9	163.4	188.7	314.7
% Growth YoY		61.9%		66.7%
In constant currency FX rate	100.9	182.6	188.7	356.0
% Growth YoY		80.9%		88.6%
Active Customers (LTM, m)			1.6	2.8
% Growth YoY				78.7%

## Key Performance Drivers

- Jumia is the leading pan-African commerce platform, comprised of: (i) an online marketplace connecting consumers with sellers of products and services, (ii) a logistics service enabling shipping and delivery of packages from sellers to consumers, and (iii) a payment service facilitating transactions among participants on the platform and providing access to a range of financial services.
- GMV was EUR 163.4m in Q2 2018, representing 61.9% YoY growth in absolute Euro terms (80.9% on constant currency basis). The number of active consumers reached 2.8m as of H1 2018, growing by 78.7% YoY. This growth illustrates Jumia's deep local expertise, its strong brand and its powerful platform.
- The company continues to focus on driving more sellers and more products and services to the platform in order to increase the attractiveness to consumers in terms of selection and price. Moreover, as part of its continued commitment to driving attractiveness to consumers, Jumia has recently introduced a number of new digital payment solutions and services, such as airtime recharge or utility payments, which help consumers save time and money on more types of daily needs.
- Current momentum with consumers confirms Jumia's position as Africa's leading commerce platform and showcases the strong potential of the continent, where there are over 450 million internet users and 1.2 billion people.

### Ownership

- Rocket Internet's economic ownership: 28%<sup>(1)</sup>

Source: Jumia management reports. Please refer to the appendix for detailed information.

Note(s):

(1) Economic ownership includes stakes held directly as well as indirectly, including beneficial interest through RICP (where applicable).

EURm	Q2 2017 <sup>(2)</sup>	Q2 2018 <sup>(2)</sup>	H1 2017 <sup>(2)</sup>	H1 2018 <sup>(2)</sup>
<b>Revenue</b>	<b>51.2</b>	<b>58.4</b>	<b>98.9</b>	<b>120.5</b>
<i>% Growth YoY</i>		14.2%		21.9%
<b>Gross Profit</b>	<b>22.0</b>	<b>24.9</b>	<b>42.4</b>	<b>51.1</b>
<i>% Margin</i>	43.0%	42.7%	42.9%	42.5%
<b>Adj. EBITDA<sup>(1)</sup></b>	<b>(1.8)</b>	<b>0.8</b>	<b>(5.0)</b>	<b>2.8</b>
<i>% Margin</i>	(3.4)%	1.3%	(5.1)%	2.3%
<b>Cash Position</b>			<b>13.7</b>	<b>7.0</b>
<b>GMV</b>	<b>56</b>	<b>67</b>	<b>115</b>	<b>139</b>
<i>% Growth YoY</i>		19%		21%
<b>Total Orders (m)</b>	<b>0.5</b>	<b>0.6</b>	<b>1.0</b>	<b>1.2</b>
<i>% Growth YoY</i>		13%		16%
<b>Active Customers (LTM, m)</b>			<b>0.8</b>	<b>0.9</b>
<i>% Growth YoY</i>				15%

## Key Performance Drivers

### Financial

#### GMV/ Revenue

- Continued strong revenue growth of 21.9% YoY in H1 2018 increasing to EUR 120.5m
- Growth driven by strong growth in the DACH segment with full Westwing model of daily themes, permanent assortment, private label and organic marketing model rolled out

#### Profitability

- Sustainably profitable on Adj. EBITDA, now third consecutive quarter
- DACH segment at 5% Adj. EBITDA in H1 2018, International segment break-even

#### Ownership

- Rocket Internet's economic ownership: 32%<sup>(3)</sup>

### Operational

- Westwing will focus on Europe where it sees strong synergies and has therefore decided to divest its businesses in Brazil, Russia and Kazakhstan. Those businesses are reported as discontinued operations and excluded from all financial reporting going forward.
- Customer loyalty driving profitable growth: 85% of GMV comes from customers who visit Westwing on average 100x per year
- Own label and private label offering already comprises 5,000 products, its share of revenue steadily increasing (23% in DACH segment in Q2 2018 already)
- Strong growth is reflected in expansion of warehouse capacity: Westwing will open a new logistic center in Poland early 2019

Source: Westwing's unaudited consolidated financial information based on IFRS and management reports. Please refer to the appendix for detailed information.

Note(s): KPIs only include revenue generated via website. Other revenue sources (e.g. offline store) are not considered.

(1) Adjusted for share-based compensation expenses, IPO costs recognized in profit or loss and central costs allocated to discontinued operations.

(2) Excluding discontinued operations in Brazil, Russia and Kazakhstan.

(3) Economic ownership includes stakes held directly as well as indirectly, including beneficial interest through RICP (where applicable).



# H1 2018 Results Rocket Internet SE – Consolidated IFRS Income Statement

EURm	H1 2017	H1 2018
<b>Revenue</b>	18.0	23.7
Other operating income	0.6	1.9
Result from deconsolidation of subsidiaries	4.3	(0.1)
Purchased merchandise and purchased services	(8.1)	(4.5)
Employee benefits expenses	(31.9)	(26.3)
Other operating expenses	(13.9)	(15.4)
Share of profit/ (loss) of associates and joint ventures	(93.8)	99.3
<b>EBITDA</b>	<b>(124.8)</b>	<b>78.7</b>
Depreciation and amortization	(0.6)	(0.5)
Impairment of non-current assets	(0.7)	0.0
<b>EBIT</b>	<b>(126.1)</b>	<b>78.2</b>
<b>Financial result</b>	<b>96.8</b>	<b>217.8</b>
Finance costs	(55.0)	(32.6)
Finance income	151.8	250.4
<b>Profit/ (loss) before tax</b>	<b>(29.3)</b>	<b>296.0</b>
Income taxes	2.1	0.6
<b>Profit/ (loss) for the period</b>	<b>(27.2)</b>	<b>296.6</b>
Loss attributable to non-controlling interests	(1.8)	(0.4)
<b>Profit/ (loss) attributable to equity holders of the parent</b>	<b>(25.4)</b>	<b>297.0</b>
<b>Earnings per share (in EUR)</b>	<b>(0.15)</b>	<b>1.84</b>

- **Revenue** increase by 32% primarily driven by New Businesses growth (including higher volume of FinTech operations).

- **Employee benefits expenses** decrease reflects lower number of employees as well as reduced liabilities from cash-settled share based payments.

- Net gain from **associates/JVs** in H1 2018 mainly due to HelloFresh of EUR 92m (including gain on share disposals) and home24 of EUR 9m (including deemed disposal gain pursuant to the IPO in Q2 2018).

- Decrease of **finance costs** primarily results from lower foreign exchange losses that relate to cash and loans.

- Increase of **finance income** is mainly due to gain from the partial sale and share price increase of Delivery Hero.

Source: Unaudited interim consolidated financial statements.

# H1 2018 Results Rocket Internet SE – Consolidated IFRS Balance Sheet

Assets EURm	Dec 31 2017	Jun 30 2018
<b>Non-current assets</b>		
Property, plant and equipment	2.9	2.8
Intangible assets	8.9	8.6
Investments in associates and joint ventures	853.0	795.5
Non-current financial assets	937.9	953.4
Other non-current non-financial assets	1.0	2.2
<b>Total non-current assets</b>	<b>1,803.7</b>	<b>1,762.5</b>
<b>Current assets</b>		
Inventories	0.2	0.1
Trade receivables	5.4	4.7
Other current financial assets	1,014.2	347.8
Other current non-financial assets	2.2	3.6
Income tax asset	13.1	12.2
Cash and cash equivalents	1,716.6	2,456.9
<b>Total current assets</b>	<b>2,751.6</b>	<b>2,825.2</b>
<b>Assets classified as held for sale</b>		
	<b>0.0</b>	<b>0.4</b>
<b>Total assets</b>	<b>4,555.3</b>	<b>4,588.1</b>

- Decrease in **Investments in associates and joint ventures** mainly due to sale of HelloFresh Shares for EUR 150m.

- Decrease in **Other current financial assets** mainly due to closing of the sale of shares in Delivery Hero (EUR 728m) to Naspers. It includes also bank deposits (EUR 165m) and investments in publicly listed technology shares (EUR 88m).

Equity and Liabilities EURm	Dec 31 2017	Jun 30 2018
<b>Equity</b>		
Subscribed capital	165.1	154.4
Treasury shares	(21.1)	0.0
Capital reserves	3,100.3	2,854.9
Retained earnings	235.2	1,174.6
Other components of equity	621.9	(8.0)
<b>Equity attributable to equity holders of the parent</b>	<b>4,101.4</b>	<b>4,176.0</b>
Non-controlling interests	24.7	23.3
<b>Total equity</b>	<b>4,126.1</b>	<b>4,199.3</b>
<b>Non-current liabilities</b>		
Non-current financial liabilities	285.1	329.7
Other non-current non-financial liabilities	12.5	10.6
Deferred tax liabilities	1.2	0.1
<b>Total non-current liabilities</b>	<b>298.7</b>	<b>340.4</b>
<b>Current liabilities</b>		
Trade payables	12.4	8.4
Other current financial liabilities	101.1	22.3
Other current non-financial liabilities	16.1	16.4
Income tax liabilities	1.0	1.1
<b>Total current liabilities</b>	<b>130.5</b>	<b>48.2</b>
<b>Liabilities directly associated with assets classified as held for sale</b>		
	<b>0.0</b>	<b>0.2</b>
<b>Total liabilities</b>	<b>429.2</b>	<b>388.8</b>
<b>Total equity and liabilities</b>	<b>4,555.3</b>	<b>4,588.1</b>

- In H1 2018 share buy-back was completed and **Subscribed capital** reduced by EUR 11m and **Capital reserve** by EUR 244m

- **Non-current financial liabilities** mainly include convertible bonds (EUR 276m) and in H1 2018 non-controlling interests classified as financial liabilities (EUR 52m).

- Decrease in **current financial liabilities** due to the derecognition of a derivative financial liability of EUR 78m upon closing Delivery Hero share sale to Naspers.

Source: Unaudited interim consolidated financial statements.

# Strong Cash Reserves

**Cash at Selected Privately Held Companies<sup>(1)</sup>**  
as of August 31, 2018

**c. EUR 0.3b<sup>(2)</sup>**

**Net Cash at Rocket Internet SE<sup>(3)</sup>**  
as of August 31, 2018

**EUR 2.1b**

Source: Unaudited management information.

Note(s):

(1) Selected privately held companies include: GFG, Jumia and Westwing, i.e. excluding Delivery Hero, HelloFresh and home24.

(2) Cash position includes gross cash and committed equity capital.

(3) Net cash represents gross cash minus (i) convertible bond outstanding in the amount of EUR 35m (subject to squeeze-out) and (ii) commitments made.

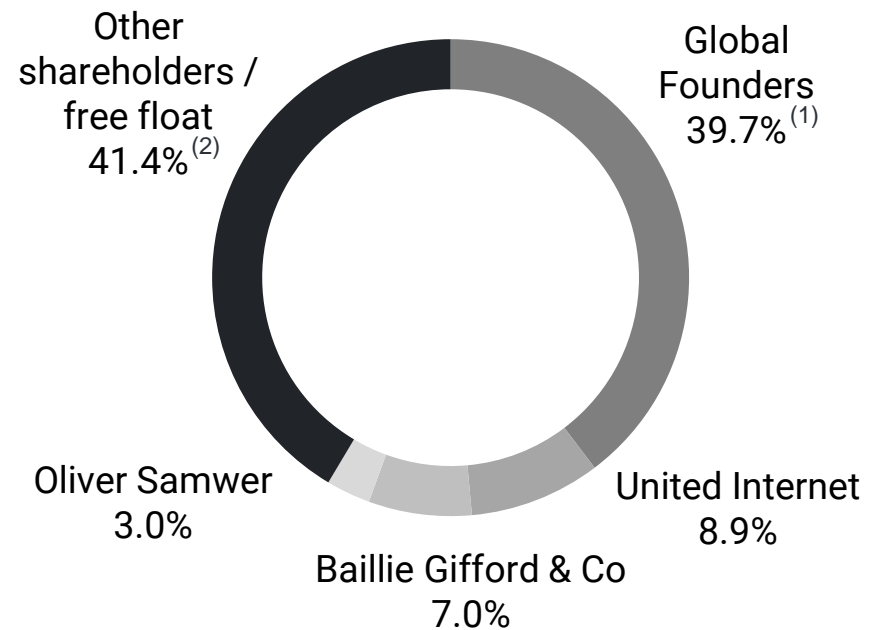
# Share Buy-Back Program 2018/19

On September 20, 2018, Rocket Internet announced a new share buy-back program for up to EUR 150 million and up to 5.5 million shares

## Key Terms

- Up to **EUR 150 million** and up to **5,500,000 shares**
- This represents up to 3.6% of the currently 154,374,884 shares outstanding
- Scheduled to commence **September 20, 2018** and will end **September 19, 2019**
- The repurchased shares are intended to either be redeemed and Rocket Internet's share capital reduced accordingly or to be used to settle employee stock option grants
- For full details, please reference the announcement on our website [www.rocket-internet.com/investors/share](http://www.rocket-internet.com/investors/share)

## Current Shareholder Structure



Note(s):

(1) The shareholdings of Global Founders GmbH are attributed to its controlling shareholder Rocata GmbH and to Rocata GmbH's controlling shareholder Zerena GmbH. As a shareholder of Zerena GmbH, Oliver Samwer Familienstiftung indirectly holds the Rocket Internet SE shares previously held by Oliver Samwer through Global Founders GmbH.

(2) Other Shareholders/Free Float refers to shareholdings with less than three percent in Rocket Internet SE.

# Financial Calendar 2018

Date	Event
November 30, 2018	9M 2018 Results for Rocket Internet & Selected Companies and Capital Markets Day (London)

# Agenda

## Topic

## Presenter

H1 2018 Results for Rocket Internet & Selected Companies

Peter Kimpel  
*CFO*

Summary Remarks

**Oliver Samwer**  
*Founder and CEO*

# Continued Build & Roll Out of New Ventures & Internet Platforms

## B2B Food Group

**CATERWINGS**

— We make eat happen —



*Germany and Europe*



*Order-In*



*Australia*



- Establishment of a **global group pooling successful ventures** in the B2B food delivery space
- Cornerstone ventures will be **Berlin-based Caterwings** and **Australian corporate catering marketplace Order-In**

