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Executive summary

- **LAA has consolidated its lead as the #1 dedicated online auto classifieds platform in Mexico** with record organic online traffic¹ growth of +107%, as well strong growth in Ecuador (64%) and Peru (31%)
- **Exponential growth in finance and insurance product sales**, providing a defined path to operational cash positive around 2H18
- Underlying² group cash receipts in A\$ terms were up +50% since December quarter 2016, representing a **+46% improvement in net monthly cash outflows improvement vs pcp³**
- **Significant revenue upside potential**. Mexico alone is estimated to present a A\$232m⁴ revenue opportunity, with its population 7x Australia
- **Significant upsell volume growth, with +794% volume growth in upsell products YTD** in Ecuador and Mexico⁵
- **Finance and insurance generate high margins**, with one auto finance product (MotorCredit) generating up to 6.3x revenue of traditional monthly dealer subscription revenue
- **Strong long-term macro tailwinds support revenue growth, with increasing internet penetration and rising motor vehicle ownership** driving rapid growth of the Latin American auto-classifieds industry
- **Highly experienced, shareholder-aligned Board and management team** (shareholding of c. 43%) have continued investing for growth

1. SEO & Direct traffic for Sep-17 compared to Sep-16 2. Refers to core markets of Mexico, Ecuador and Peru 3. Including monthly capex related to IT expenses, excludes one off severance costs of A\$229k during 3Q 4. Source: AFR article 9-August-17. 5. Finance and insurance launched in Ecuador in Jan-17 and in Mexico Jun-17

What we do

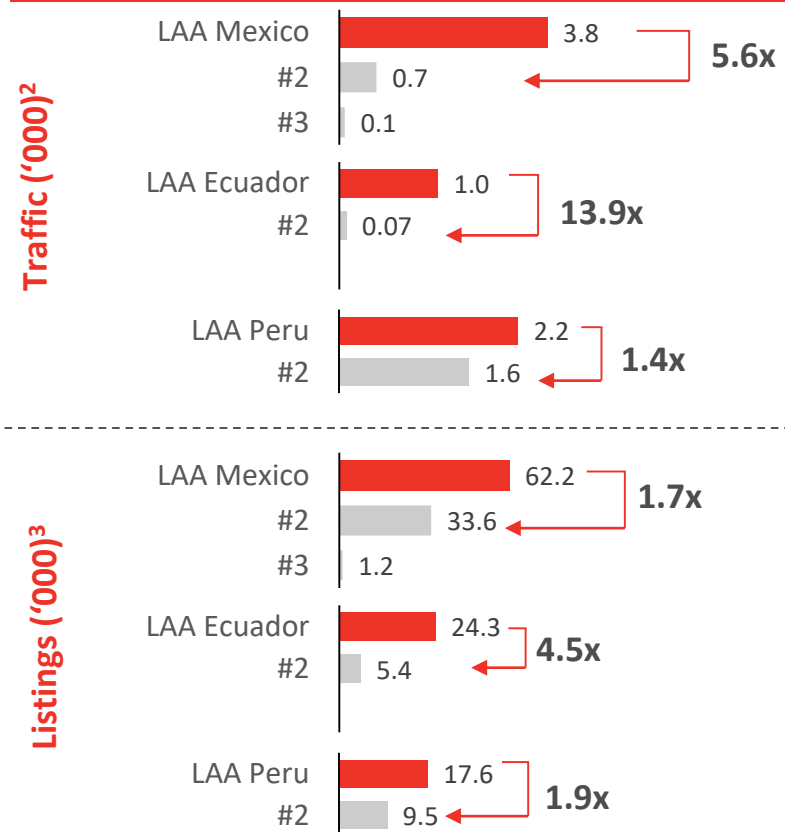
LAA provides a Latin American online automotive classifieds platform with upsell products

Strong Momentum: The Company delivered strong cashflow inflows for the September 2017 quarter, **+50% since Dec-16 quarter** in core markets of Mexico, Ecuador and Peru

1 Latin America focus¹



2 Clear leading market positions vs. no. 2²



3 Monetising its customer network

LAA's is executing the 3rd stage of its strategy:

- Stage 1 – Acquiring cornerstone businesses
- Stage 2 – Building leading market positions
- Stage 3 – Monetising customer networks

This is a **positive inflection point** in LAA's business life cycle, where cashflows grow in line with upsell product revenues.

Upsell Products:

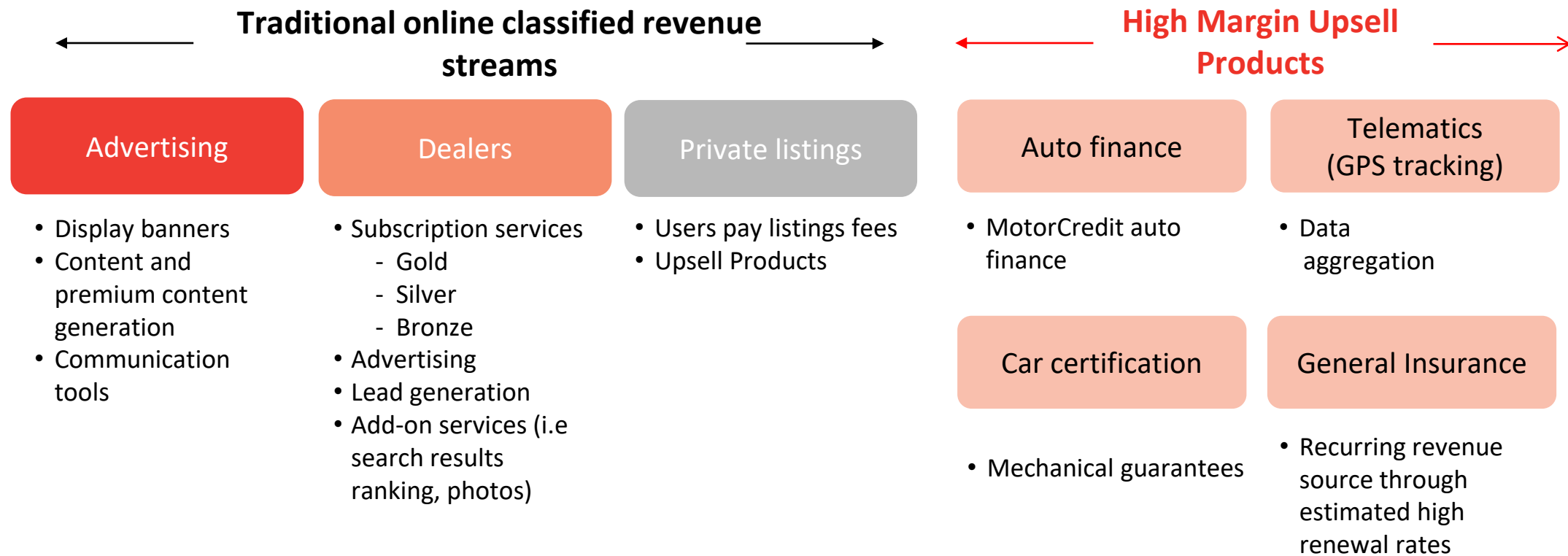
- Finance and transaction services
- Connected car and data analytics
- Insurance Products

1. Revenue by country percentage estimated using FY 2017E. 2. Traffic source: Similar web, traffic for Sep-2017, Similarweb.com third party service provider that provides estimates only, actual results may be significantly different to similarweb estimates. Analysis excludes autocosmos.com.mx as it is considered a content site 3.Listings – Each website as at Oct-17

Business and revenue model

LAA provides an online automotive marketplace which connects car buyers with car sellers (both private sellers and car dealers)

- LAA generates “traditional” revenues from its online car classified business through advertising, car dealer subscriptions and private listing fee revenues
- LAA supplements its traditional revenues with a range of highly profitable upsell offerings called “Upsell Products”



• **+794% growth in unit sales since January, see page 12**

Key investment considerations

Market

Significant addressable market

- Mexico's 128m population over 7x Australia and presents a revenue opportunity of ~A\$232m¹.

Strong revenue growth outlook

- Increasing internet penetration and regional GDP per capita growth driving rapid growth of the Latin American auto-classifieds industry
- Strong revenue growth momentum driven by:
 - Strong organic online traffic flows
 - Strong sales momentum in high margin upsell products
 - Signing two large dealer associations in Mexico as potential customers (combined ~600+ dealers)

Leading market positions

- First mover advantage, leading market positions and high barriers to entry in key geographies
- Number 1 dedicated online auto classifieds platform in Mexico, Ecuador and Peru

1. Source: AFR article 9-Aug-17, 2. SEO & Direct traffic for Sep-17 compared to Sep-16.

Company

Visible path to breakeven cash flows

- Mix of cost reduction and revenue growth (growth in core classifieds and upsell revenues) expected to accelerate path to cash breakeven
 - Mexico and Ecuador being managed for cashflow growth
 - Peru currently approx. cashflow breakeven

Positive leading indicators point to strong outlook

- Record organic online traffic growth in the 12 months to 30 September 2017 of +107% (Mexico), 64% (Ecuador) and 31% (Peru) SEO & Direct traffic for Sep-17 compared to Sep-16².
- Partnerships with dealer associations driving new dealer customer numbers

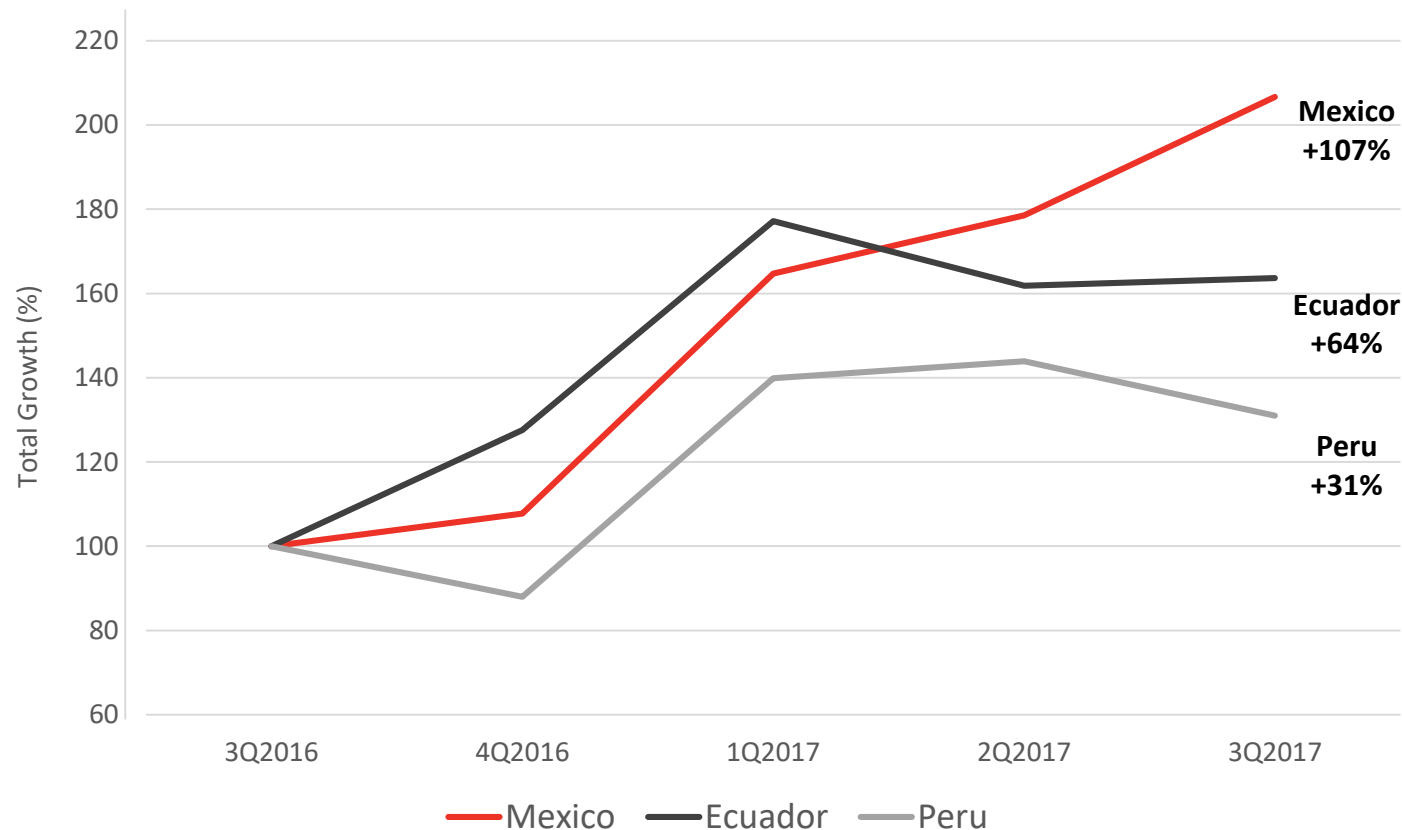
Leveraged to fast growing, high margin upsell products

- +794% growth in upsell product unit volumes since Jan 2017
- Outlook is strong, as existing dealers increase take-up rates and new dealers sign onto the LAA platform
- Upsell products are high margin and expected to substantially contribute to revenue and EBITDA growth

Strong growth in organic traffic

Organic traffic growth has grown significantly, benefitting from network effects in core markets and strategic partnerships

Organic Traffic Growth (SEO & Direct rebased to 100)

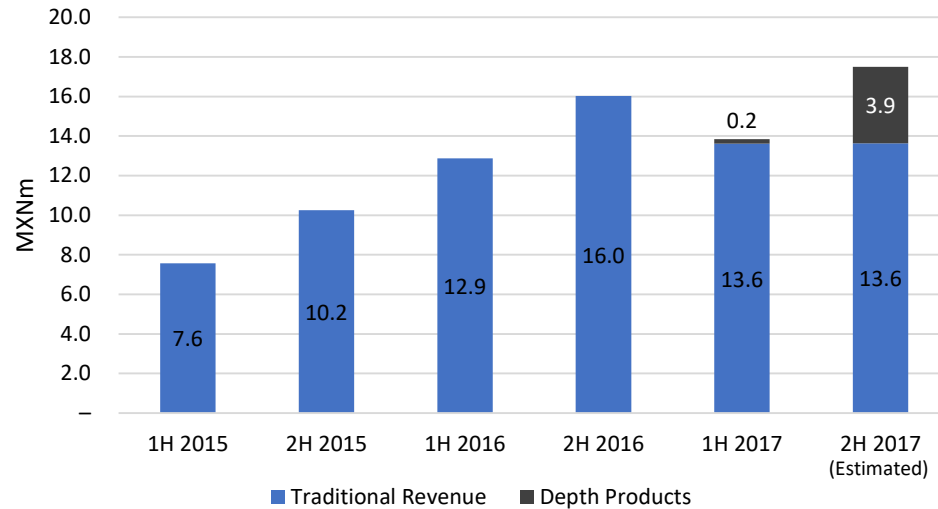


- Record organic online traffic growth in the 12 months to 30 September 2017 of +107% (Mexico), 64% (Ecuador) and 31% (Peru)¹
- Strategic partnership with ANCA driving new dealer subscriptions²

Strong revenue growth momentum

Key revenue Trends

Revenue – Mexico (MXNm)



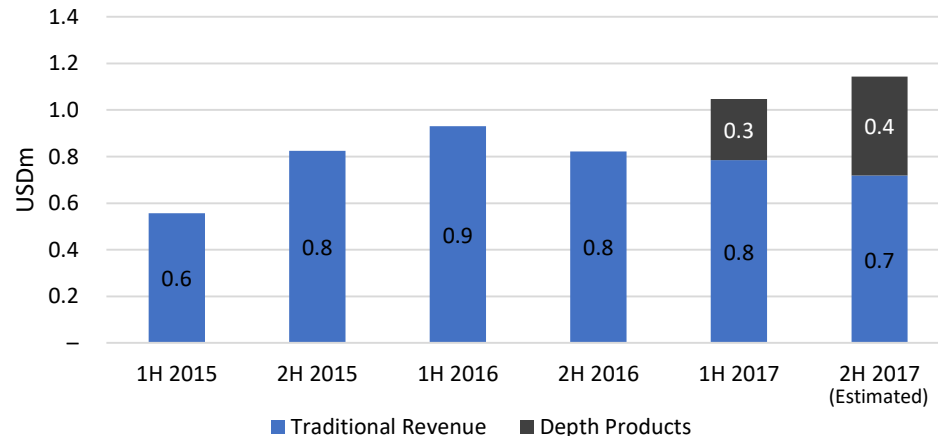
Historical revenue growth momentum was over 80% since 1H15.

Upsell Products are expected to provide an even greater inflection point in revenue and profitability growth.

MEXICO REVENUE PERFORMANCE

- **Strong revenue growth.** 83% growth from 1H15 until 1H17

Revenue – Ecuador (USDm)



ECUADOR REVENUE PERFORMANCE

- **Strong revenue growth.** 88% growth from 1H15 until 1H17

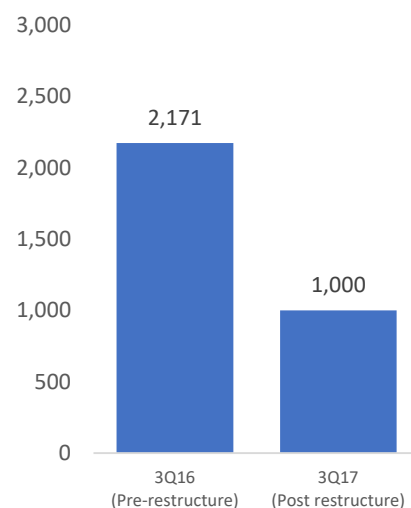
Visible path to positive cash flows

Cost optimization comparison 3Q16 vs. 3Q17 pre and post restructuring

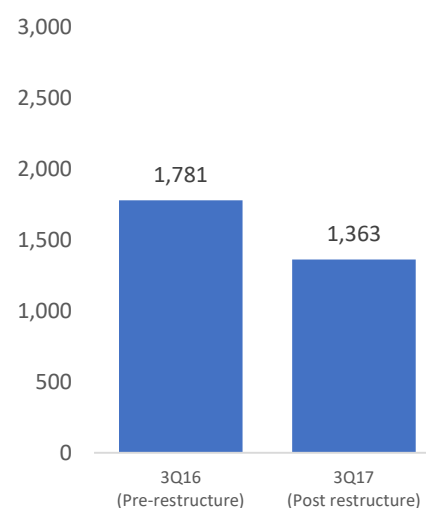
Operating cash outflows reduced by 33% year over year

- Marketing: down 54%
- Personnel: down 23%
- Admin expenses: down 24%

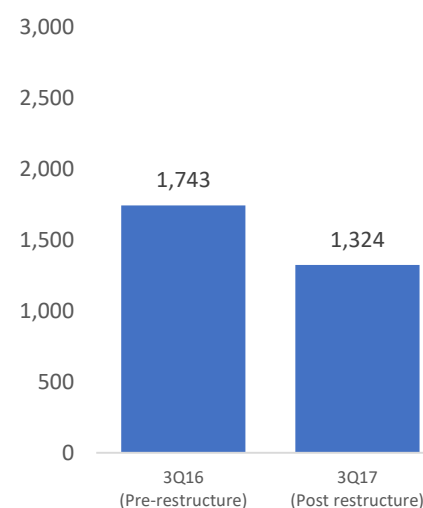
Marketing (A\$ '000)



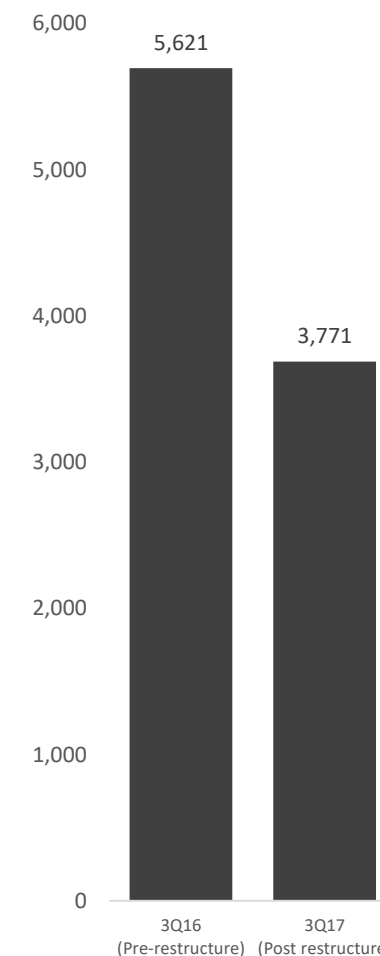
Personnel (A\$ '000)



Admin (A\$ '000)



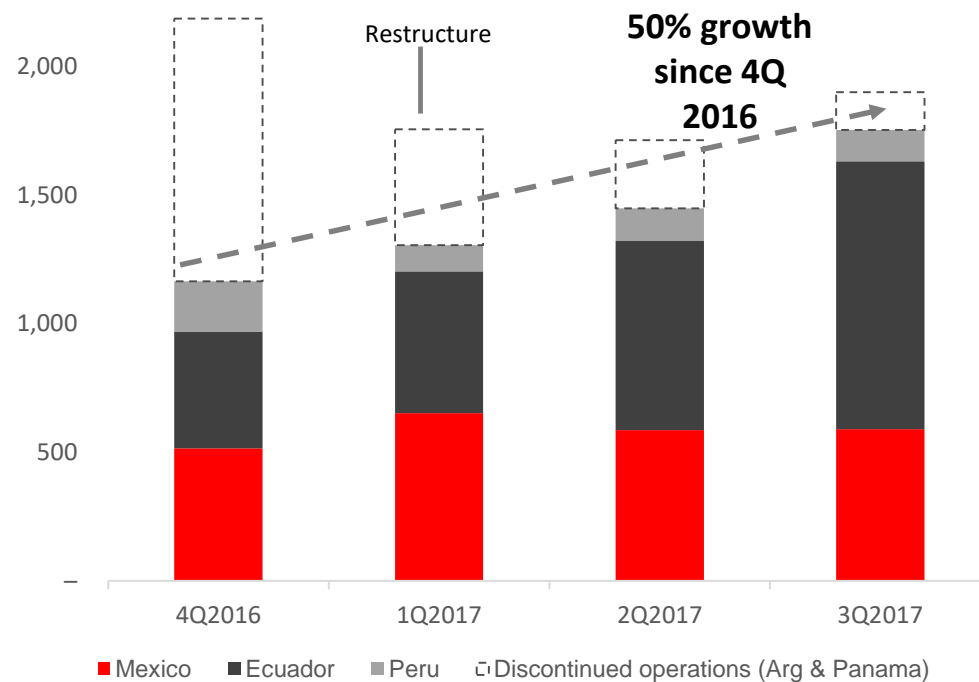
Total outflows
(A\$ '000)



Visible path to positive cash flows

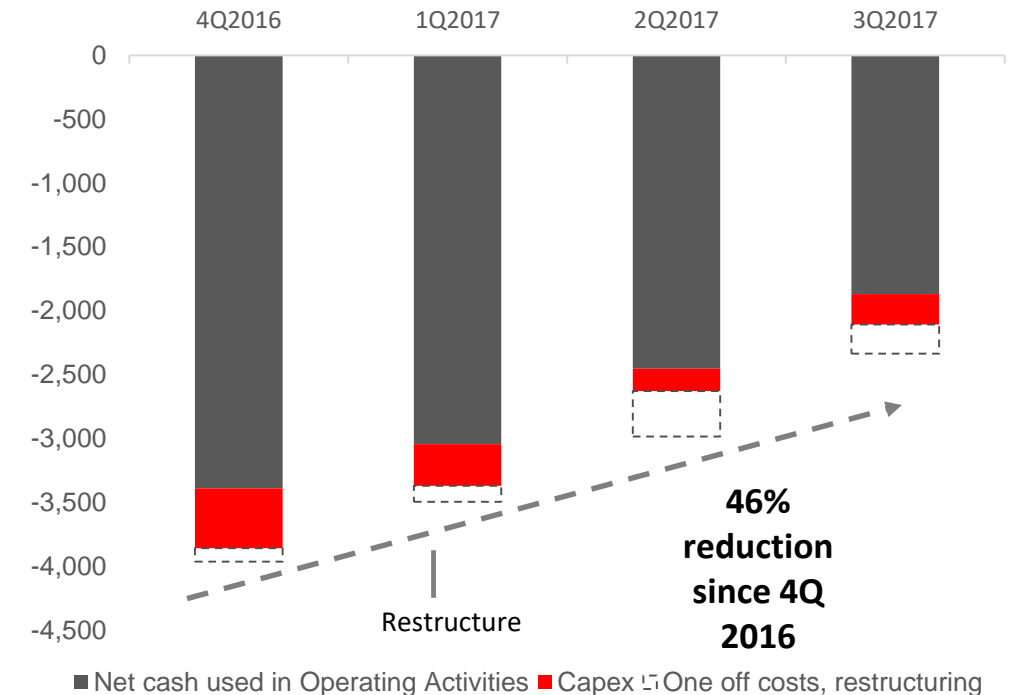
LAA experienced strong momentum in the September quarter 2017 driven by the impact of the restructure; strong organic online traffic flows; and strong sales momentum in high margin, Upsell Products

Increasing Quarterly Cash Receipts (A\$ '000)



Cash receipts from customers of A\$1.8m were +25% versus pcp, +50% versus December quarter 2016

Decreasing Quarterly Net Cash Outflows (A\$ '000)



Net cash outflows of A\$2.1m (excluding one-off severance costs) declined 46% versus pcp. This was driven by both revenue increase and cost reductions

Business turnaround and transformation

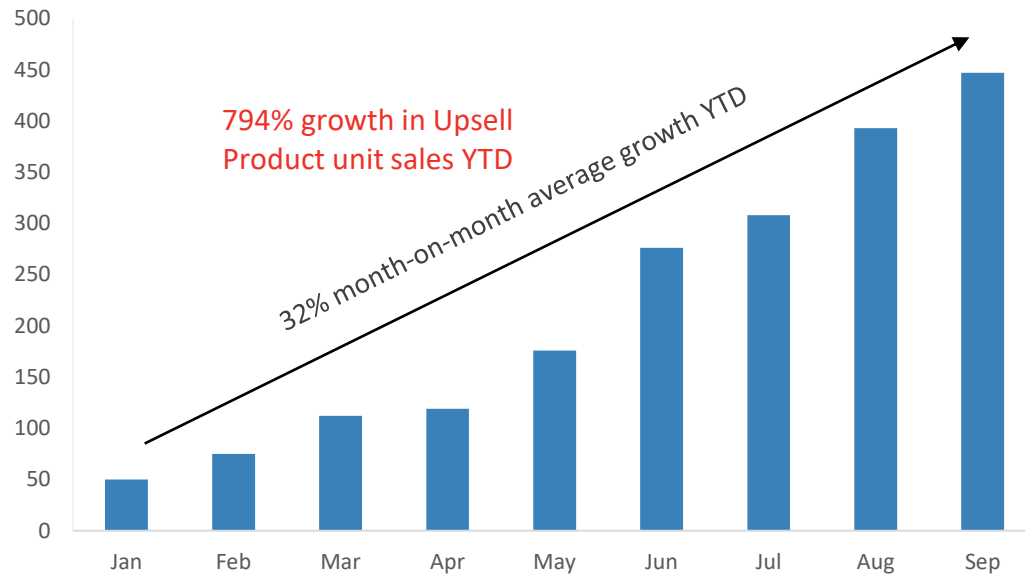
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AREAS OF TRANSFORMATION	2016	2017
1 STRATEGY	<ul style="list-style-type: none"> Targetting 4 markets Mexico, Argentina, Ecuador and Peru Growth primarily from traditional classifieds revenue streams 	<ul style="list-style-type: none"> Focused on core markets of Mexico and Ecuador Growth from classifieds but particularly from high margin Upsell Products such and finance and insurance
2 FINANCIAL	<ul style="list-style-type: none"> Building market share through investment in marketing, brand, people Record local currency revenue growth in Mexico (+62%) Argentina (+61%), Peru (+31%), Ecuador (+29%) 	<ul style="list-style-type: none"> Restructure completed to focus resources on high prospect markets Mexico and Ecuador, and profitability +50% increase in cash receipts, and 46% decrease in cash outflows from core markets
3 MARKET POSITION	<ul style="list-style-type: none"> Mexico (seminuevos.com) 3.1x larger than closest competitor Ecuador (patiotuerca.com) dominant market position 	<ul style="list-style-type: none"> Mexico (seminuevos.com) extends lead to be 3.5x larger than closest competitor (revenues basis) Ecuador (patiotuerca.com) maintains dominant market position
4 PROFITABILITY	<ul style="list-style-type: none"> Path to profitability driven by growth in dealer revenues, advertising and private listings 	<ul style="list-style-type: none"> Exponential growth of finance and insurance products through our dealer sales channel Dealer ARPU has potential to materially increase due to introduction of Upsell Products
5 ORGANIC GROWTH	<ul style="list-style-type: none"> Significant marketing investment in 2016 Offline marketing campaign through BTL, radio and billboards 	<ul style="list-style-type: none"> Resultant growth in organic traffic in Mexico (+107%), Ecuador (+64%) and Peru (31%)

High growth in sales of finance, insurance and telematics

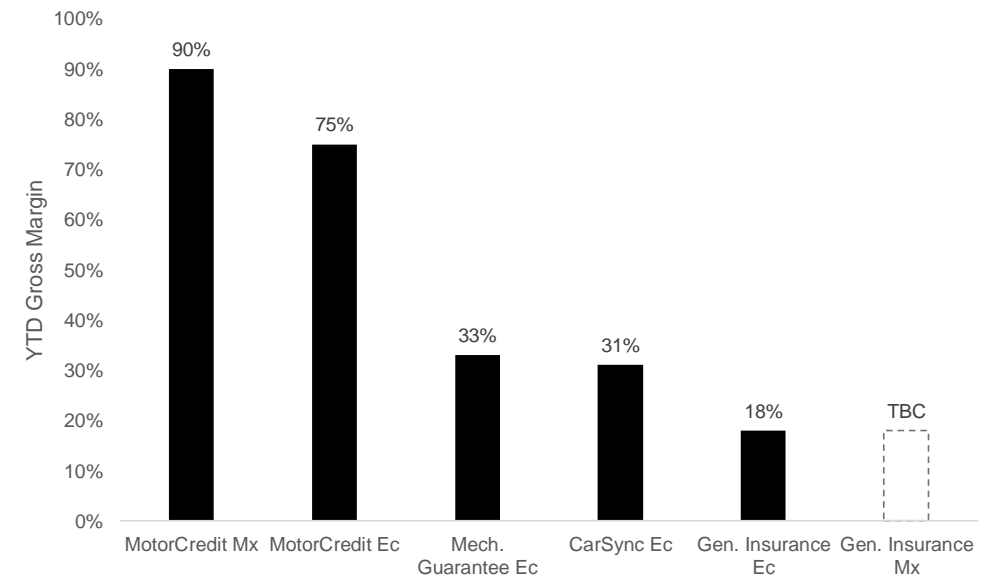
LAA has experienced strong initial growth in demand for its high margin auto finance and insurance products

Total Upsell Product Sales (Unit Sales per month in Ecuador and Mexico)



Upsell Products unit sales include: finance and transaction services, connected car and data analytics, insurance products, car certification

YTD Gross Margins of Upsell Products



Upsell products expected to make a substantial contribution to revenue growth and EBITDA improvement in 2H17

- Ongoing penetration of high margin Upsell Products further enhances the market leading position of our classifieds business by adding to our value proposition with customers and increasing network effects of our market leading position
- LAA's strategic partnership with ANCA (national Mexican used car dealer association) has been particularly positive

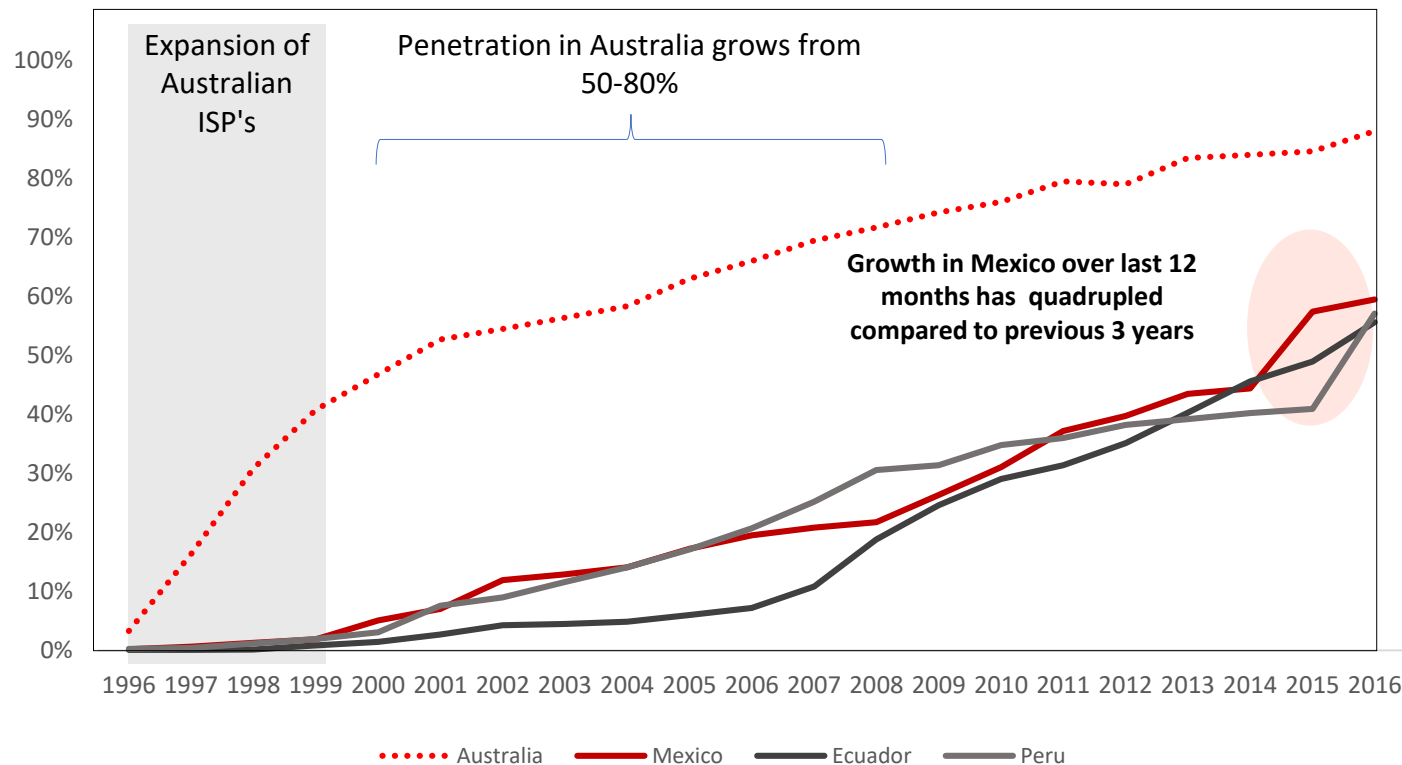
Growth driver #1 - rising internet penetration

Average internet penetration in LatAm Autos key markets c. 59% in 2016 and growing rapidly toward Australia's internet penetration of 88% the populations

Industry overview

- Internet penetration in Latin America expected to **accelerate from 50% toward 80% faster than the comparable Australian period**
 - Invention of smartphones will accelerate penetration due to lower cost barriers to entry
 - Latin American government policies are focused on increasing internet penetration
 - Global technologies supporting internet roll-out (satellite, fibre optics) have greatly improved and been made more efficient
 - An increasingly digitised global economy will force uptake for expanding Latin American businesses
- Smartphone contract costs in Mexico have reduced materially over the last 18 months due to deregulation and competition from the incoming AT&T

Internet penetration (% of population)¹



1. Source: as of 2015 World Bank. For 2016, Peru: Statista, Mexico: INEGI, Ecuador: MINTEL

Growth driver #2 - increasing market share

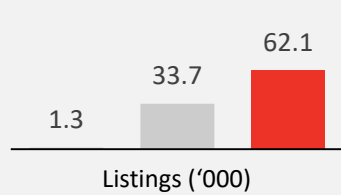
LAA clearly leading when comparing key metrics: listings and traffic

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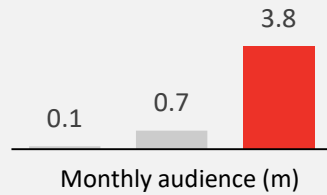
Mexico

SEMINuevos.com

#1 Listings



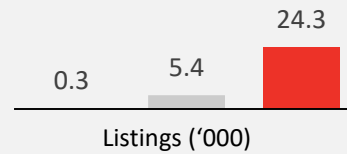
#1 Traffic



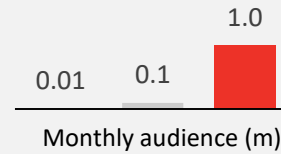
Ecuador

PATIO Tuerca.com

#1 Listings



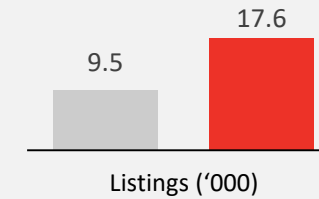
#1 Traffic



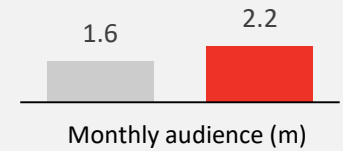
Peru

TODOAutos.pe

#1 Listings



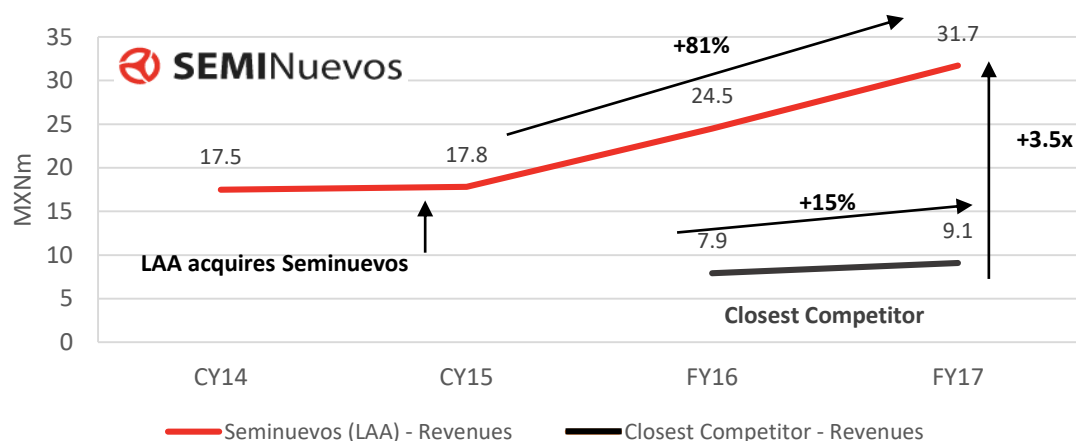
#1 Traffic



Growth driver #2 - increasing market share

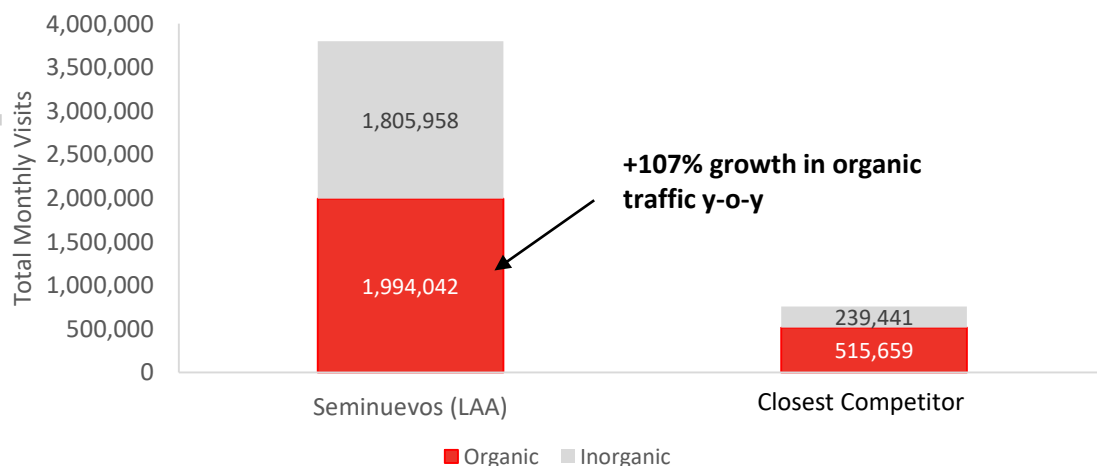
Case Study Mexico: Seminuevos.com (LAA) leading the market

Revenue Evolution Analysis¹



- LAA owns the number 1 auto classifieds platform in Mexico
- LAA has grown its Mexican business seminuevos.com 81% since acquisition
- Mexico auto classifieds market has revenue potential to be \$232 million²

Similarweb Audience Comparison³



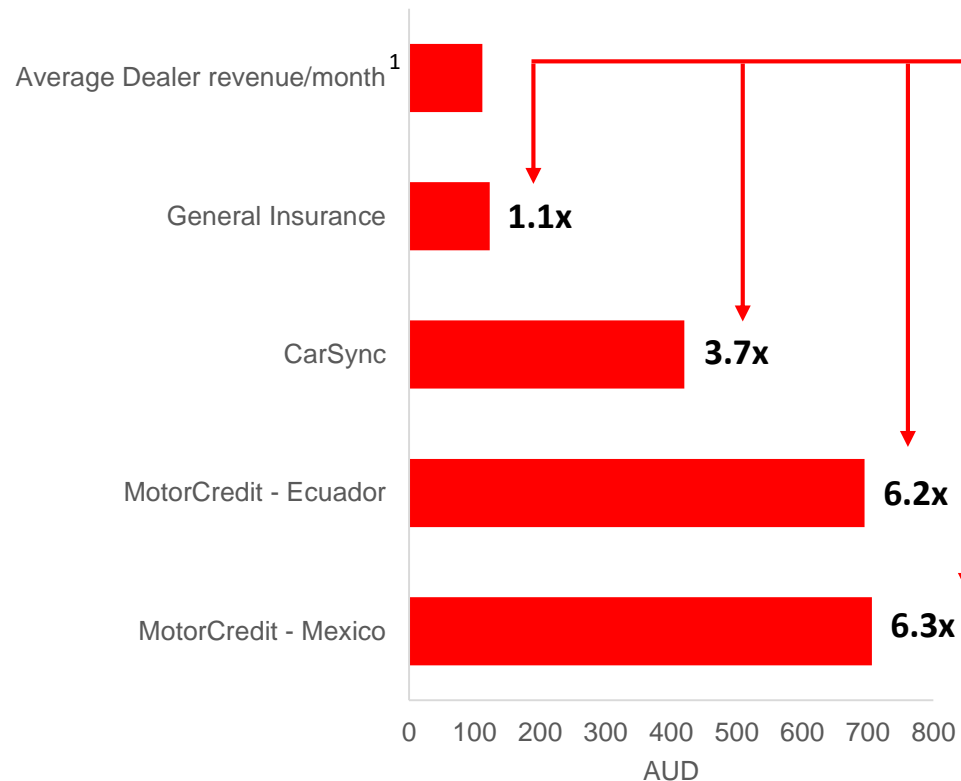
Seminuevos (LAA) has more traffic than its closest auto-dedicated competitor in Mexico based on:

- Total traffic: 5.0x more traffic
- Organic traffic: 3.9x more traffic
- Inorganic traffic: 7.5x more traffic

Growth driver #3 - high upsell earnings leverage

LAA is highly leveraged to high margin, fast-growing upsell product sales, which generate up to 6.3x the revenue of traditional dealer subscription revenue.

LAA focusing its efforts on most profitable products



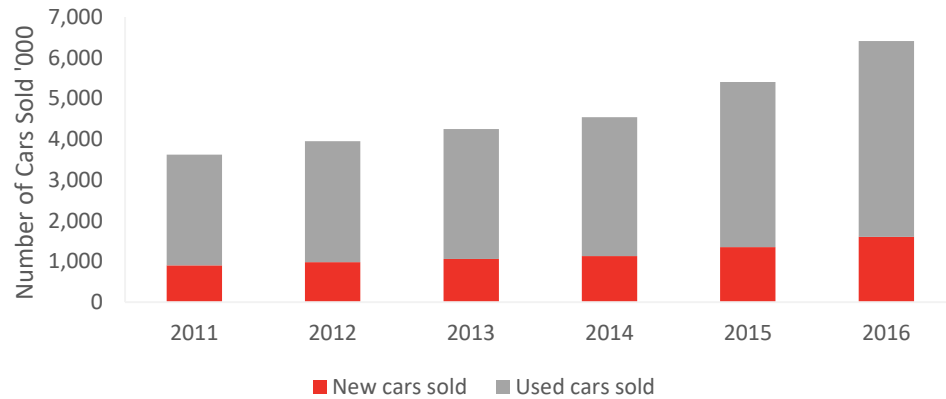
- LAA to focus on driving upsell product sales in its core growth markets of Mexico and Ecuador
- Mexico is expected to be LAA's key growth driver
- Upsell Products expected to make a substantial contribution to revenue growth and EBITDA improvement in 2H17

1. Average Dealer revenue / month refers to classifieds package only

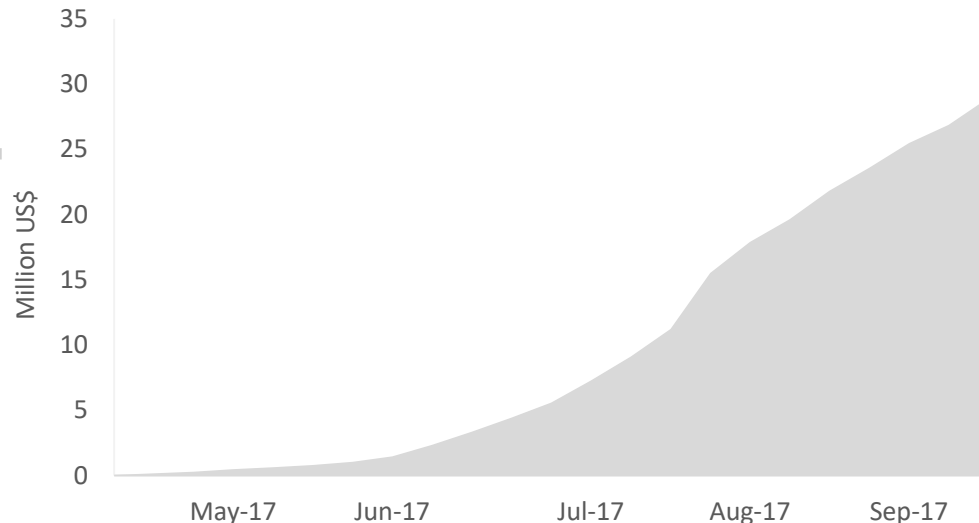
Significant addressable market opportunities

Motor Credit Mexico alone is a A\$74m annual revenue opportunity

New and Used Vehicles' Market Sales in Mexico²



Cumulative Value of Weekly Loan Applications Since Launch in Mexico



- Total new car sales in Mexico were 1.6m in 2016, of which 67% were financed representing a 27% y-o-y growth
- Industry estimates assume total used car sales is ~3x new car sales, therefore ~4.8m used car sales in 2016
- Assuming 50% are financed, this implies a market potential of 2.4m used car sales p.a. which means there is potential for 2x the number of financed used cars compared to the current new car finance market
- Achieving a 5% share of the potential used car financing market, translates to gross revenue to LAA of A\$74m
- MotorCredit, LAA's proprietary auto finance product for used cars, is backed by leading banks in each market. MotorCredit in Mexico has 80%+ margins for LAA
- MotorCredit was launched in Ecuador in Dec-16 and Mexico in May-17
- By the end of Sep-17, MotorCredit has received US\$29m worth of loan applications in Mexico
- Revenue to LAA from each successful loan application is **equivalent to 6.3x new car dealers customers** with our classifieds only package (assuming average ARPU)

Significant addressable market opportunities

Mexican market leader with a revenue opportunity of up A\$232m

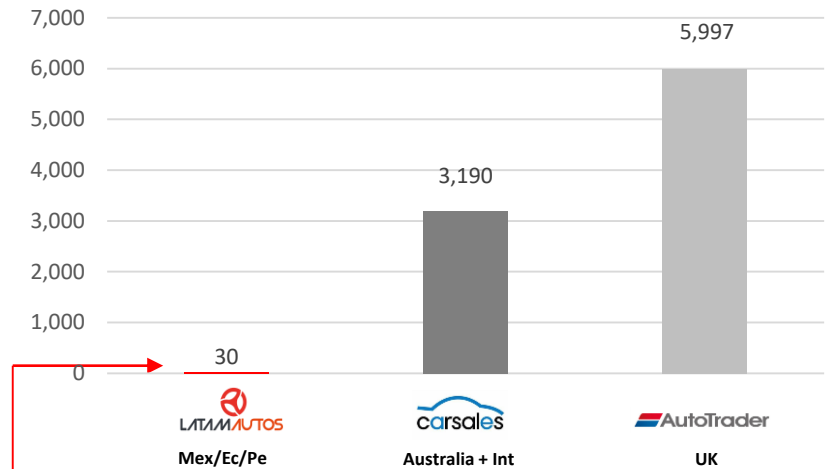
Mexico



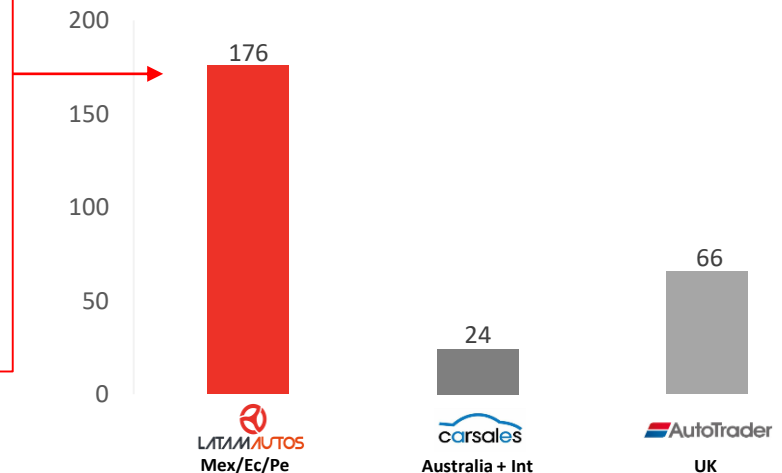
- **Competitive Position:** LAA has been investing in Seminuevos.com for almost 3 years and is a clear leader¹ (2.6x traffic, 3,5x¹ revenue and 1.7x listings versus #2)
- **Increase in Organic Traffic % yoy²:** 107%. Fundamental for any leading classifieds business, strong growth further evidence of market leadership
- **Revenue Opportunity:** “In Mexico revenue could grow ...to as much as \$232 million”³
- **Population GDP/Capita⁴:** 127.5m/GDP per capita \$8,201. Mexico is the Latin America’s second largest economy behind Brazil
- **Total Cars compared to Australia⁵:** 37.4 million (LAA market’s total vehicle fleet= 2.4x the size of Australia).
- **Internet Penetration:** 59.5%⁶ (LAA markets’ total internet users= 4.9x the size of Australia).

Substantial mismatch in valuation versus potential market size given clear market leading position amongst dedicated auto classifieds businesses

Market Capitalization Comparisons (AUDm)⁷



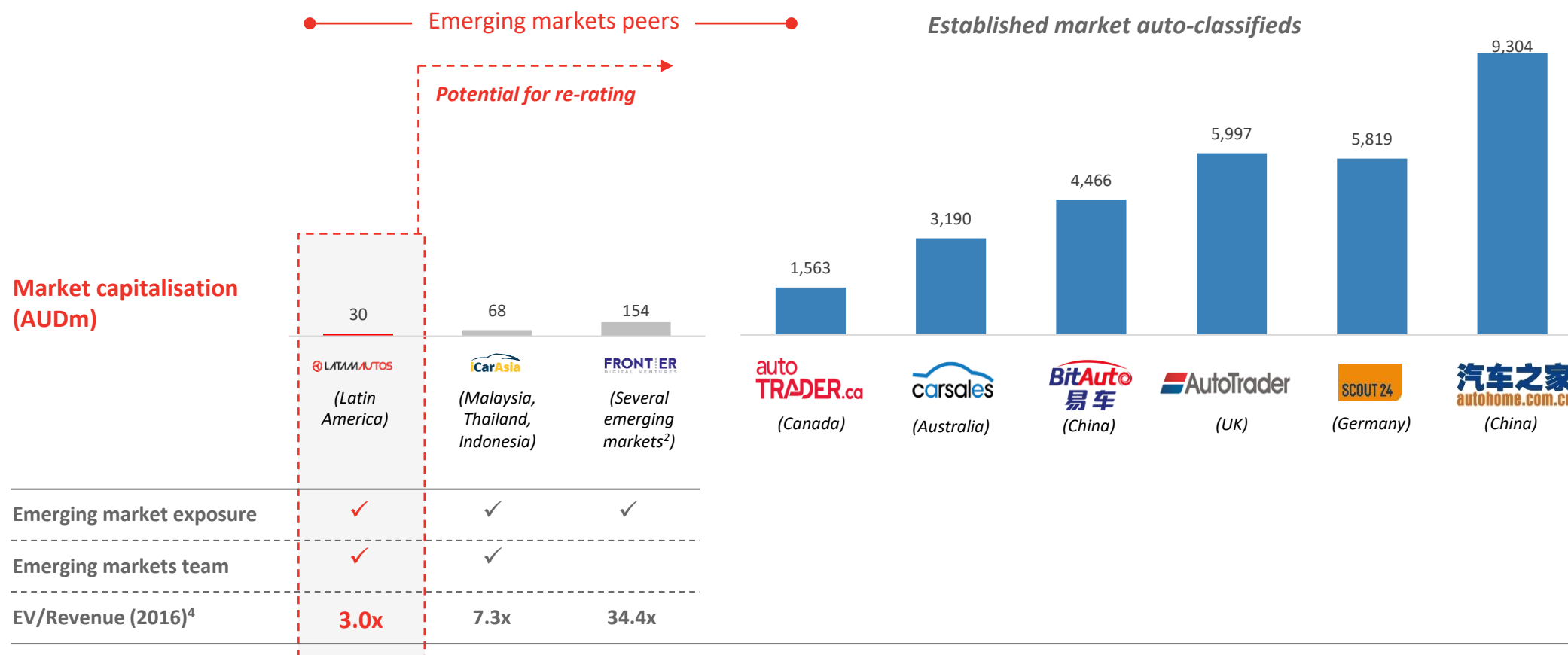
Population comparisons (millions)⁸



1. Comparing traffic versus closest direct competitor, source: Similarweb.com Similarweb.com third party service provider that provides estimates only, actual results may be significantly different to similarweb estimates. 2. Comparison of full-year forecast, Company 3. AFR Article, Aug 09 2017, “Carsales new CEO can rev international Business”. 4. World Bank 2016, GDP/Capita (Current US\$). 5. OICA, 2015. 6. INEGI Mexico, 2016. 7. Yahoo Finance. 8. World Bank, 2015. Population corresponds to companies’ core markets

Attractive relative valuation

LAA is attractively priced relative to global and domestic peers. The scale of global peers highlights the significant opportunity as upsell drives revenue growth.





Source: Company filings, Yahoo Finance as at 11 October 2017. 1. Based on the acquisition value of Trader Corporation (autoTrader.ca) by Thom Bravo for C\$1.575bn announced 1 July 2016 (CAD/AUD 1.0077), 2. Frontier Digital Ventures have interests in online classified businesses in Africa, MENA, Central America and South East Asia. Assumes A\$3.9m pro rata revenue contribution according to ownership. 3. Auto-classifieds is a component of Scout24's business. 4. Estimated using Market Cap as at 11 October 2017 and Company's financial information (debt, cash and revenue) as at Dec-2016

Leading market positions

LAA is the market leader in Mexico, Ecuador and Peru

Mexico Auto Verticals

 SEMINuevos.com

	#1 Listings	#1 Traffic
 seminuevos.com	62,119	3,800,000
autocosmos.com.mx*	8,149,	1,450,000
soloautos.mx	33,689	680,000
carmudi.com.mx	1,257	120,000

Ecuador Auto Verticals

 PATIO Tuerca.com

	#1 Listings	#1 Traffic
 patiotuerca.com	24,324	980,000
patiodeautos.com	5,422	72,000

Peru Auto Verticals

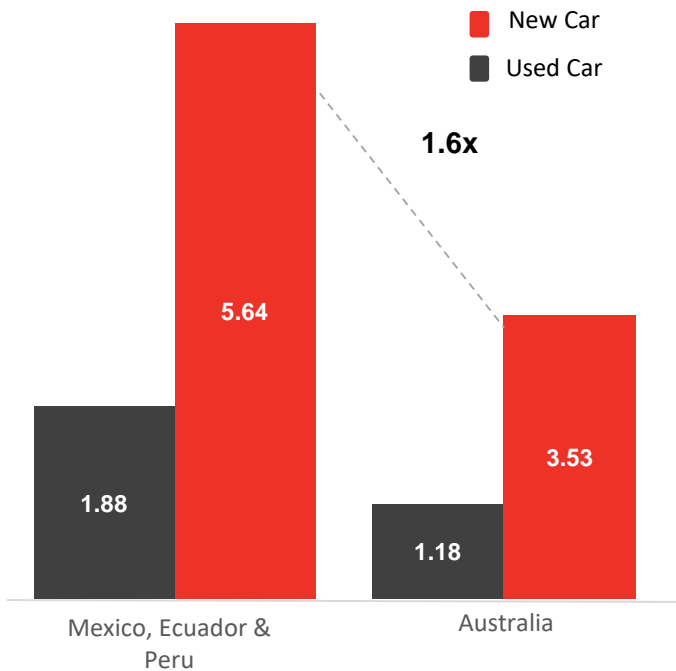
 TODOAutos.pe

	#1 Listings	#1 Traffic
 todoautos.com.pe	17,562	2,220,000
neoauto.com	9,542	1,639,248

Significant upside potential across our core markets

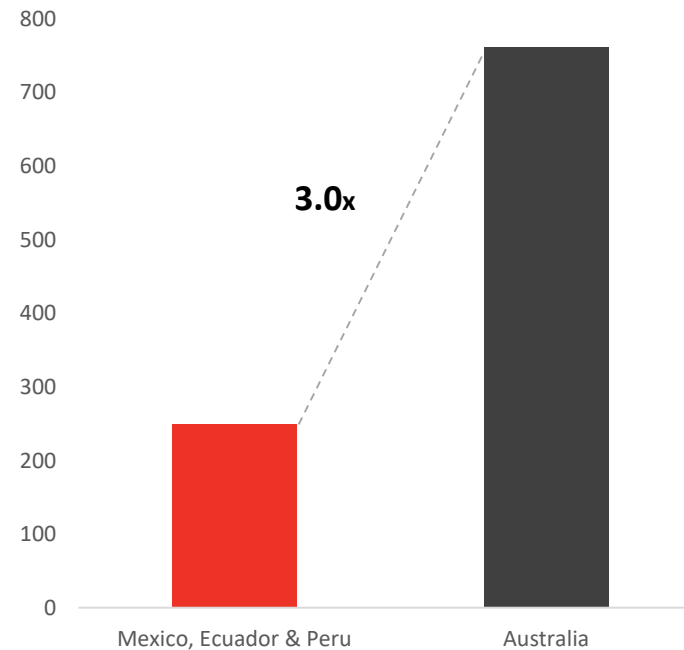
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Million of vehicles transacted in 2017¹



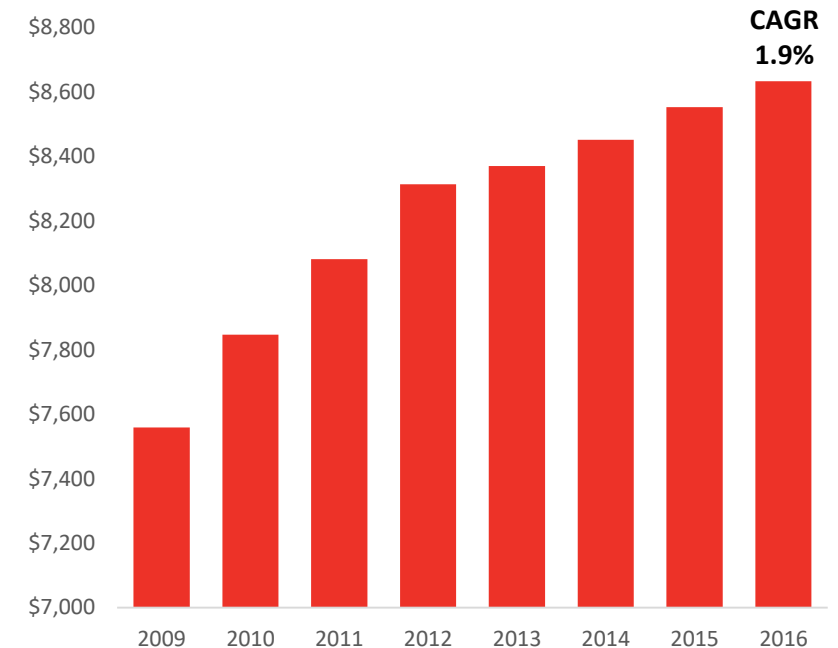
Considerable larger transactional market compared to Australia

Number of vehicles per 1,000 population²



LatAm growth potential

GDP per capita growth (US\$)³



Increasing purchasing power will drive demand for vehicles

1. Data for Mexico from AMDA, August (2017); Ecuador-AEAE, August (2017); Peru-AAP, August (2017 forecast); Australia-ABS, August (2017). 2. Population, World Data Bank 2016; OICA "Vehicles in use", 2016 (estimated using 2016 new cars sold for each country) 3. Population Weighted average on constant 2010 US\$, World Data Bank, 2016.

Mexican Customer Testimonial – September 2017

Mexico's biggest market for pre-owned cars: more than 700 vehicles on floor 365 days a year



LAA presents at ANCA conference

How has your experience with the Seminuevos.com products been so far?

"Very good, it has helped us bring customers closer to us, to let them know us better, and obviously this results in more sales"

■ Increase in Car Sales – faster inventory turnover

"Through Seminuevos.com's support, the number of sales will increase to 500 vehicles sold per month. We would be talking about a 40% growth in our sales."

Manager

■ Buyers come immediately asking for the financing product

"We have seen a lot of people interested in the financing product. We see how different sellers approach Seminuevos.com's advisers for the paperwork, and how the buyers [...] come immediately to ask about it."

Manager

■ Key takeaways from the interview

- *Leads from the platform have increased ~40%¹ during the past 4 weeks, quality leads... MotorDEALER App is wonderful "made for dummies", it only takes 5 minutes to upload a car*
- *Selling insurances is a great idea, it was the missing piece for dealers to close the cycle*
- *Versatility, range of products, quality of service and support throughout the vehicle's sales process are some of the qualities of Seminuevos.com*

1. Assuming same growth rate as vehicle sales per month

Company overview

LatAm Autos is the leading Latin American dedicated online auto-classifieds and content platform with a focus on the automotive markets of Mexico, Ecuador and Peru

Company overview

- LatAm Autos owns three of the leading online auto-classifieds platforms in Latin America and has operations in six countries
- LatAm Autos provides online classifieds services to commercial sellers, private sellers and buyers of vehicles as well as transactional focused services including used car financing and telematic product sales



Clean capital structure

Share price	A\$0.10
Number of shares	312.1m
Market capitalisation	A\$31.2m
Cash Balance (30-Sep-17) ¹	A\$5.4m
Convertible Note	A\$10.0m
Other Debt (30-Sep-17)	Nil ¹
Enterprise value	A\$35.8m

Strong board and management alignment

Timothy Handley, Gareth Bannan - Founders & Exec. Chairman and CFO	15.5%
Michael Fitzpatrick - Non-Executive Director	12.1%
Simon Clausen - Non-Executive Director	8.5%
Jorge Mejía Ribadeneira - Co-Founder and Chief Executive Officer	4.3%
Colin Galbraith – Non-Executive Director	0.4%
Jacobo Moreno - Chief Technology Officer	2.0%
Total Board and management	c.43%

1. Includes A\$10m cash from convertible note, of which A\$3.25m received prior to 30-Jun-17 with the remainder to be received in 2H17 Source: IRESS

1H16 v 1H17 Summary P&L

		1H 2016	1H 2017 Statutory	Change	1H 2016	1H 2017 Proforma*	Change
Revenue	AUDm	3,9	3,0	-0,9	2,5	2,6	0,1
Opex	AUDm	-9,8	-8,6	1,2	-7,6	-7,1	0,5
EBITDA	AUDm	-5,9	-5,7	0,3	-5,1	-4,5	0,6

* Proforma financials are calculated as statutory financials excluding impacts from discontinuing Argentinian operations. Share based payments are deducted from both Statutory EBITDA and Proforma EBITDA

- LAA's statutory financial results were materially impacted by the closure of the Argentinian operations in 1H17
- Excluding the results of the Argentinian operation (and share based payments) the Company increased revenues by 4% and decreased EBITDA loss by 12% on PCP
- 2H17 is expected to be substantially stronger than 1H17 as it will be the first period that most of the Upsell Products will be sold for a full six-month period in both Mexico and Ecuador

Outlook and key catalysts

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Focus on key markets	<ul style="list-style-type: none"> ▪ Mexico is expected to be LAA's key growth driver. Upsell Product sales volumes growth expected to continue, despite interruptions from earthquake in September ▪ 4.8 million used car sales p.a. in Mexico, MotorCredit used car finance a huge opportunity
Leading market position	<ul style="list-style-type: none"> ▪ First mover advantage, leading market positions and high entry barriers in key geographies ▪ Leveraging its customer channels to become the one stop shop for car buyers, further participating in the car buying transaction itself
Disciplined capital management	<ul style="list-style-type: none"> ▪ Mix of cost reduction and revenue growth (growth in core classifieds and upsell revenues) expected to accelerate path to breakeven <ul style="list-style-type: none"> - Mexico and Ecuador being managed for cashflow growth - Panama and Peru currently approx. cashflow breakeven
Visibility on breakeven	<ul style="list-style-type: none"> ▪ Strong revenue growth momentum by multiple growth drivers: the impact of the restructure (is driving Mexico and Ecuador to cashflow positive, whilst reducing expenditure to Panama and Peru to cash breakeven); strong organic online traffic flows; and strong sales momentum in high margin and Upsell Products. ▪ Targeting cash flow breakeven during 2H 2018
Strong Balance Sheet	<ul style="list-style-type: none"> ▪ Strong cash position of A\$5.4m at 30 September 2017, all proceeds from convertible note received ▪ Company successfully restructured, focused on revenue growth and getting to breakeven

Board of Directors

Exciting growth potential of LatAm Autos is reflected by a highly credentialed Board of Directors

RioTinto

CommonwealthBank



HASTINGS



Tim Handley

Executive Chairman

- Co-Founder and Executive Chairman
- 14 years entrepreneurial, M&A (Gresham Partners & UBS Investment Bank), equity and debt capital markets experience (including 7 years in Latin America)



Michael Fitzpatrick

Non-Executive Director

- Founded Hastings Funds Management
- Director of Carnegie Wave Energy (ASX: CWE), Infrastructure Capital Group and Chairman Pacific Current Group (ASX: PAC)
- Former Director of Rio Tinto (ASX: RIO)
- Previously Chairman of AFL Commission



Colin Galbraith

Non-Executive Director

- Special Advisor to Gresham Partners
- Chairman of CARE Australia
- Previously a Director of Commonwealth Bank of Australia (ASX: CBA)



Simon Clausen

Non-Executive Director

- Over 17 years experience in high growth technology businesses in both Australia and the United States
- Founder and CEO of PC Tools
- Founding investor and NED of freelancer.com (ASX: FLN)



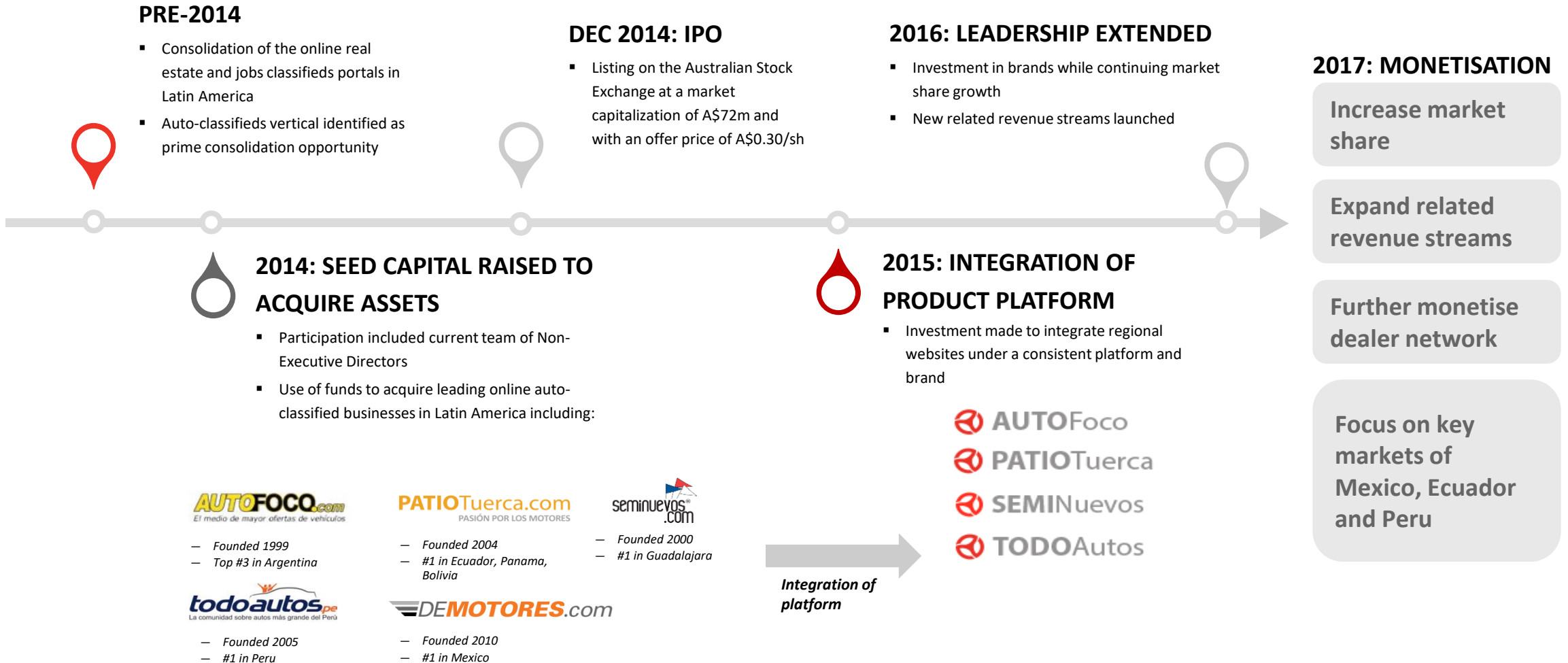
Jorge Mejía Ribadeneira

Executive Director and CEO

- Co-Founder of LatAm Autos
- Founder of multitrabajos.com, Ecuador's foremost jobs search engine
- Founded Evaluar.com (Latin America's leading HR evaluation company) and Seguros123.com

Key milestones to date

LatAm Autos has progressed rapidly since inception with an integrated software platform currently servicing approximately 3,000 dealers



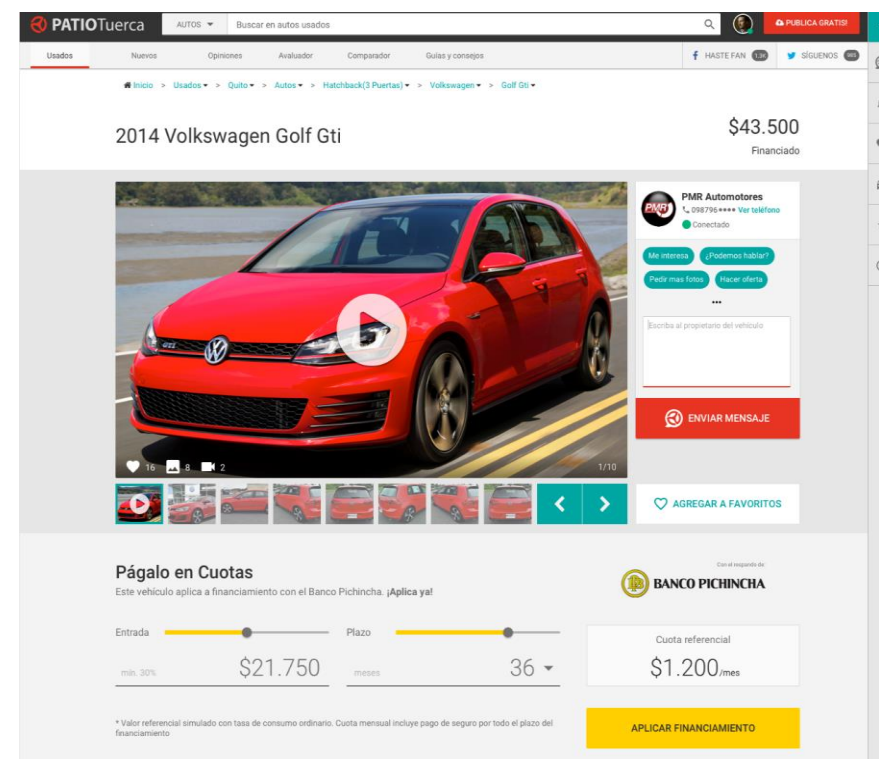
Appendix A. Related revenue stream MotorCredit

MotorCredit has been launched successfully in Ecuador and Mexico with unit sales being consistent with management expectations

Overview

- Auto finance product developed specifically for Latin America
- Launched in Ecuador with the largest bank, Banco Pichincha
 - Until 30-Sep-17 there has been a US\$71m cumulative value of loan applications received
- Launched in Mexico with a leading and innovative Financing Institution, Credito Real (Mexican stock exchange ticker: BMV:CREAL)
 - Strong uptake in the first months
 - Until 30-Sep-17 the cumulative value of loan applications received was USD33m, with the number of actual loans issued roughly doubling each month
 - Management estimates are that MotorCredit Mexico has a potential annual revenue (to LAA) of A\$74m¹

Online MotorCredit functionality



Appendix A. Related revenue stream CarSync

CarSync product offering presents a new, attractive recurring software-as-a-service (“SaaS”) revenue stream which is expected to accelerate the path to profitability

Overview

- CarSync is a telematics product which is installed in vehicles, generating continuous data on client behaviour
 - LatAm Autos co-owns the big data
- Product features GPS intelligence, motion sensors and mobile data connectivity which allows users to create a driving profile based on their travel and safety statistics
- CarSync will be licensed using 1 to 4 year agreements
 - Generates SaaS revenue stream
 - Pricing plans include an upfront installation fee (>US\$300) and an annual fee from US\$200

Distribution details



CarSync will initially be distributed through four primary channels:

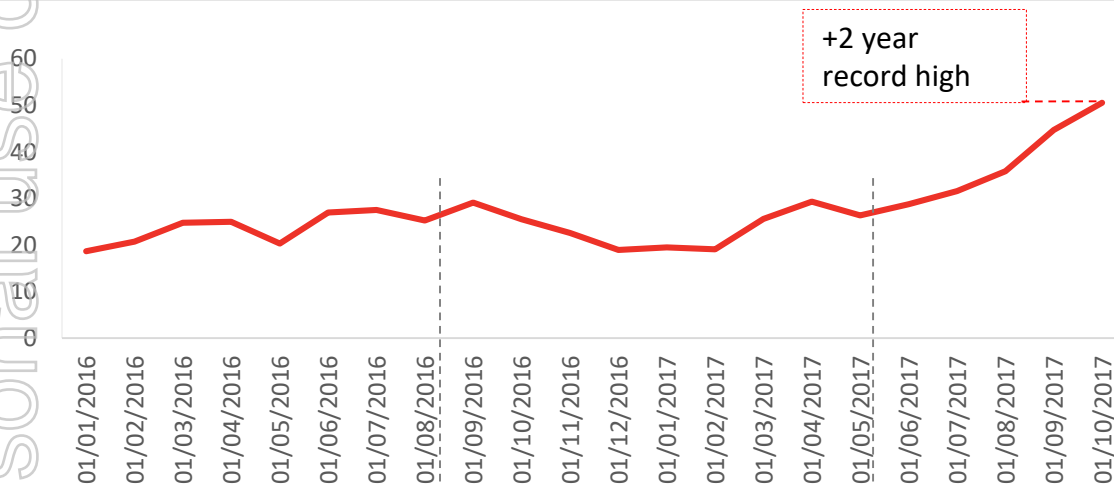
1. **Direct distribution** through the existing dealer base
2. **Online and call centre marketing**
3. **Trade marketing** through the LatAm Autos MotorBit platform
4. **Existing service renewals:** retrofitting of existing vehicles



Appendix B. Bitauto case study

Bitauto (BITA) is successfully monetising the auto finance market in China through its 48% ownership in Yixin

Bitauto - Share Price and Yixin investments timeline



Announcement¹

Closing²

Investment by strategic investors including Tencent and jd.com in Yixin Capital, BITA's auto finance subsidiary

Used cars financed through Yixin, as of 2016, represents a 2% share of China's used car market¹, applying the same market share to the Mexican used car market⁵ would imply LAA selling a total of 115,000 loans if the same market share was attained

BAA



Growth (4 year Avg)³:

59%

Market Cap⁴:

USD 3.5 B

52 week Hi-Lo:

16.56 - 53.49

Stake in Yixin:

47%

Yixin¹



Valuation Aug-17:

USD 3.7B (UBS)

Yixin loan transaction volume:

2016/ 2017/ 2018 (F): 201k / 241k / 301k

Overview¹

- Since inception in 2015, the rising demand for auto finance products in China and Bitauto's strong dealership relationships, has supported strong growth in Yixin's transaction volume
- Robust growth in Bitauto's transaction services revenues for 2Q17 of 188%, representing 42% of total revenue composition
- "We believe auto finance can enhance the profitability of Bitauto's overall transaction services"... **"Auto Finance is the new crown jewel"** Source UBS
- Through its auto finance subsidiary, Yixin, Bitauto has successfully evolved from a content business to a transactions services business
- **"We believe there is a value in the stock and that the market is underestimating the company's growth potential, particularly in auto finance"** Source UBS

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