STEALTHGLOBAL
HOLDINGS LTD

We are a leading Australian based multinational distributor of industrial, safety & workplace products serving various markets across our diversified business portfolio in Australia, United Kingdom, Asia and Africa.

HALF YEAR 2021
Briefing Presentation

25 FEBRUARY 2021
ASX Code : SGI

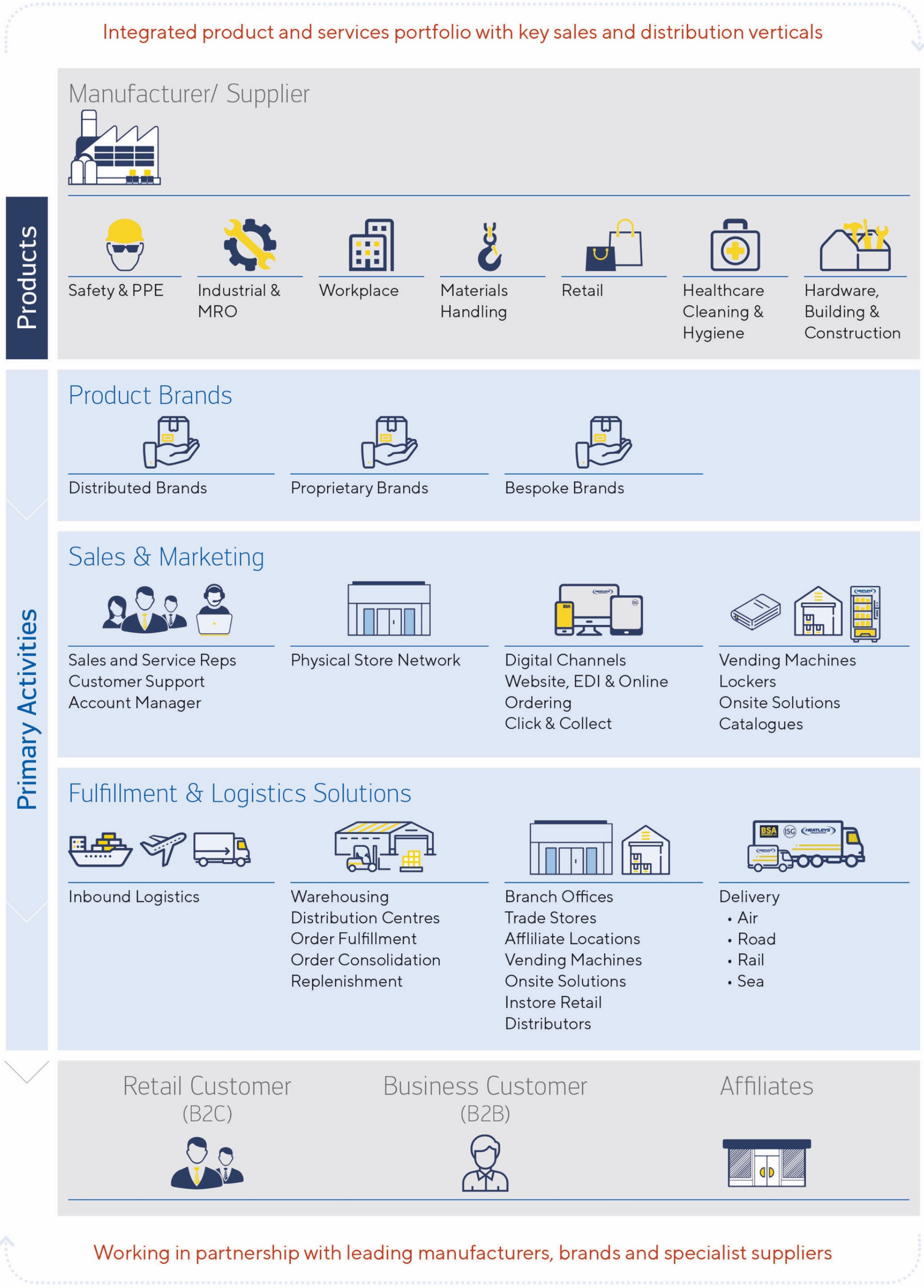
Group Overview

An Australian based multinational distribution group

Diversified business portfolio of Products, Customers, Suppliers, Industries served, a strong supply chain, all supporting reoccurring sales activity.

- **A broad range distributor** of industrial, safety and workplace products and provider of supply chain solutions to more than 4,000 business customers and 34,000 retail customers across a variety of industry sectors.
- **We are a one-stop-shop** underpinned by an expansive product range, sales specialists, physical store network, fulfillment services, distribution centres, ecommerce channels and strong marketing, content and advertising programs.
- **Customers place orders** online, on mobile devices, through sales representatives, account managers, over the phone, by email, at our physical store network, by our e-business portal, Onsite, instore and through vending solutions.
- Headquartered in Perth, Western Australia, we operate in Australia and Internationally under five competitive brands, **Heatleys Safety & Industrial, C&L Tool Centre, Industrial Supply Group, Australian Workplace Supplies and BSA Brands (UK).**
- **We supply more than 300,000 products** sourced from some 1,500 suppliers. Over 40,000-line items are stocked in our distribution centres and across our store network. Stock availability with certainty of supply is essential to meet customer demand.

Business Model



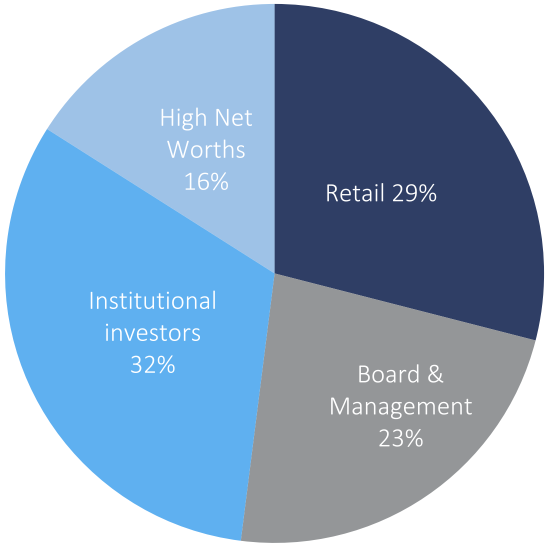
Corporate Overview

CORPORATE SNAPSHOT

ASX Code	SGI
Market Cap @ 23 February 2021	$10.0m
Share Price @ 23 February 2021	10.0 cents
Net Debt (inc C&L $2.45m) @ 31 December 2020	$3.4m
Available working capital facilities @ 31 January 2021	$5.0m
Net Assets @ 31 December 2020	$13.4m
Enterprise Value @ 31 December 2020	$13.4m
Underlying EBITDA @ 31 December 2020	$2.1m
Trading multiple - EV/Underlying EBITDA	6.4 x
Shares on issue 23 February 2021	99.7m

SGI SHARE OWNERSHIP

Ownership base with significant investment by Board and Management



23 February 2021

SGI BOARD MEMBERS

Chris Wharton AM
Chairman & Non-Executive Director

Mike Arnold
Group Managing Director & CEO

John Groppoli
Non-Executive Director

Alan Cransberg
Non-Executive Director

Karen Logan
Company Secretary

Well balanced experienced team, established to support high growth plans

Key Highlights - Half Year 2021

Delivered Earnings Uplift on 1H 2020, and also 2H 2020

Our progress has not just been incremental – we delivered material impact from organic & strategic events

Improved financial performance

Regained positive sales and earnings momentum - Strong balance sheet maintained, providing stability and growth funding capacity

- Sales of $30.4 million, down $9.3 million ($8.2 million Africa) or 23% on 1H 2020, but up 7.0% on 2H 2020, with a particularly stronger 4Q (October - December).
- Change in Africa strategy in December 2019 to refocus on more profitable customers.
- Record Underlying EBITDA of $2.1 million up 20% on 1H 2020, and up 46% on 2H 2020.

Increased scale from major investments

Continued to invest in building an enlarged business, enhancing our diversified portfolio

- Investing heavily to configure our business to meet the evolving needs of our customers – Online and Offline.
- Launched Online eCommerce e-Store channel Bisley Workwear UK.
- Completed $3.83 million acquisition in December 2020 of Queensland market leading distributor C&L Tool Centre (C&L).

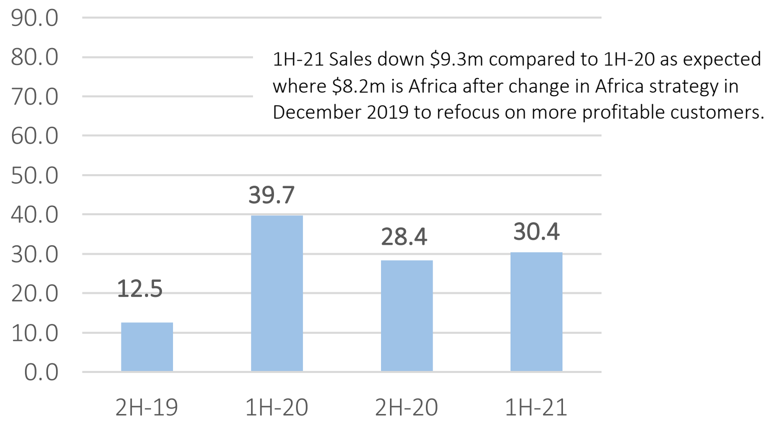
Acquisition of C&L Tool Centre

Adds $14.3m to Group annual sales and $1.3m to EBITDA on a proforma basis (FY20 earnings).

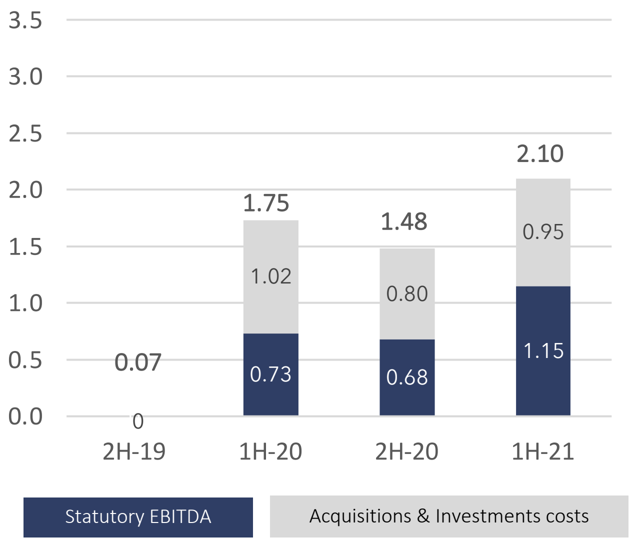
- New C&L Brisbane location expected to positively impact on customer expansion.
- New geography, more customers, more range of products & services, market leader.
- C&L will contribute sales & profit in the full 2H 2021 period.

HY21 Revenue, Underlying EBITDA and Sales Spread

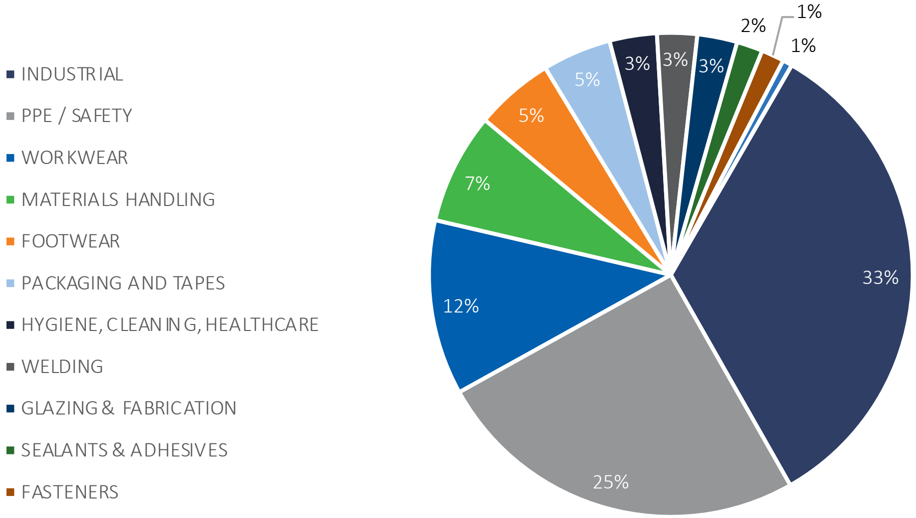
REVENUE JOURNEY $m



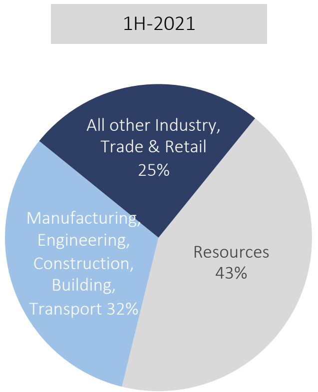
UNDERLYING EBITDA JOURNEY $m



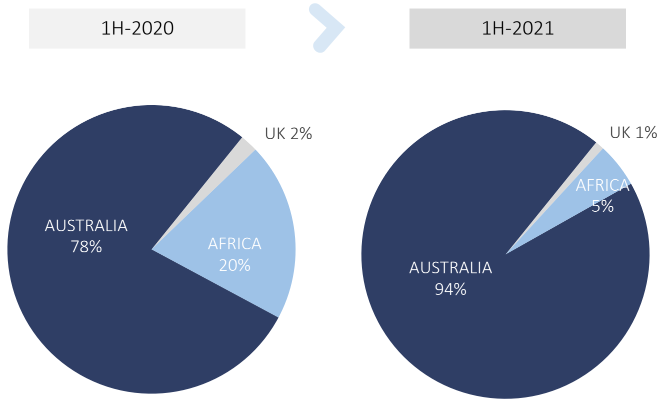
PRODUCT SALES MIX OF TOTAL SALES



INDUSTRY SALES MIX



GEOGRAPHIC SALES MIX - CUSTOMER LOCATION



STEALTHGLOBAL
HOLDINGS LTD

Our Business

25 February 2021
ASX Code : SGI

Growing Portfolio of Operating Subsidiary Brands

HEATLEYS SAFETY&INDUSTRIAL

www.heatleys.com.au

Broad range distributor of industrial, safety and workplace products to business customers.

C&L

www.cltoolcentre.com.au

Broad Range distributor of industrial, tooling, safety/ PPE, hardware, building, construction and workplace products to business and retail customers.

ISG

www.isgaus.com.au

Independent member-based buying & distribution group with an extensive member network across Australia.

AWS Australian Workplace Supplies
Safety and Workplace Solutions

www.awsonline.com.au

An Online e-Store selling safety, healthcare, and workplace products to trade and retail customers.

BSA BRANDS (UK)

www.bsabrands.co.uk

A joint venture with Bisley Workwear operating as a wholesale distributor of workwear and safetywear in the United Kingdom and Africa.

Income is earned as a broad range distributor of industrial, safety and workplace products and provider of supply chain solutions through sales force, Online, physical store network, distribution centres, vending and onsite solutions.

Scale Within The Group

People, distribution network, diversity across product range, suppliers and customers

180 team members

Up ~130 since Oct18

34 store locations in Australia
Company owned (9) and Independents (25)

Up 27 since May19

80 distributor stores in the UK
of the Bisley Workwear Brand

Up 80 since May19

more than 300,000 products on offer

more than 40,000 products in stock held in ~14,000sqm of distribution centres and stores.

more than 1,500 suppliers sourced across 19 countries

more than 4,000 business customers

Up ~3,500 since Oct18

more than 34,000 retail customers

Up ~6,000 since Oct18

Product Range – More than 300,000+ Products Available

PRODUCT CATEGORIES

- Safety / PPE
- Industrial / MRO
- Workplace
- Materials Handling
- Retail
- Healthcare, Cleaning & Hygiene
- Hardware, Building & Construction

A COMPREHENSIVE PRODUCT OFFERING
supported by leading brands

- Abrasives
- Adhesives, Sealants & Fillers
- Air Tools & Equipment
- Automotive, 4WD & Parts
- Car Care & Accessories
- Cleaning & Hygiene
- Clearance
- Clothing & Footwear
- Crib & Kitchen
- Cutting Tools
- Electrical
- Fasteners
- Glazing
- General Merchandising
- Hand Tools
- Hardware, Building & Construction
- Healthcare
- Hoses & Fittings
- Lifting & Material Handling
- Lubricants, Chemicals & Fuels
- Machinery & Workshop
- Packaging & Tapes
- Personal Protective Equipment
- Power Tools
- Print & Promotional
- Service Equipment
- Storage
- Truck & Trailer
- Welding
- Workplace

SGI Group hold ~40,000 products (~$11.0 million) stocked in its Distribution Centres and Stores

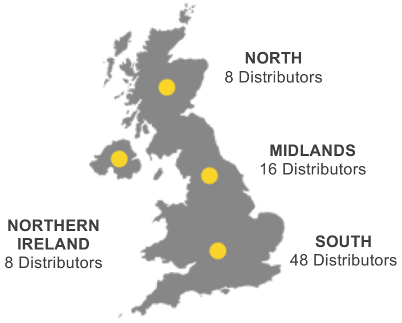
Distribution Network

Subsidiary companies and key statistics within the group

Store Network & Online Channels

Store	Location	Qty
Heatleys Safety & Industrial (Company stores)	Western Australia South Australia	5
Industrial Supply Group (Independent member stores)	Australia	25
C&L Tool Centre (Mega-store for trade & retail)	Queensland	1
Total Australia locations	Australia	31
Australian Workplace Supplies (e-Store online channel)	Australia	1
Online 'e-Store' channels	Australia (Q3/21) United Kingdom	3 1
Distributor stores	United Kingdom	80
Total		**116**

106 new store network locations established since March 2019



Our Supply Chain Simplified

We create value for different customers

Standard Distribution & Shipping

Online e-Business & e-Stores

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Half Year 2021 Results

25 FEBRUARY 2021
ASX Code : SGI

HALF YEAR 2021 - Financial Highlights

Retained Positive Sales and Earnings Momentum After Change in Africa Strategy in Dec'19 to Focus on Profitability

HALF YEAR 2021 HIGHLIGHTS

COMMENTS

- Sales of $30.4 million, down $9.3 million ($8.2 million Africa) or 23% on 1H 2020, but up 7.0% on 2H 2020, with a particularly stronger 4Q (October – December).
- Underlying EBITDA of $2.1 million up 20% on 1H 2020, and up 46% on 2H 2020. A record half-year result for Stealth.
- Statutory Net Profit After Tax of $0.17 million (including $0.95 million of investment related costs) versus NPAT of $0.03 million in 1H 2020 and $0.07 million in 2H 2020.
- $3.83 million acquisition in December 2020 of Queensland market leading distributor 'C&L Tool Centre' (C&L) adds annual sales of $14 million and annual EBITDA of $1.3+ million.
- BSA Brands (UK) (50/50 joint venture with Bisley Workwear) delivered revenue of $1.09 million up 56% or $0.4m compared to a year ago and even stronger uplift compared to 2H 2020 by $0.7m.

TRADING PERFORMANCE NOTES

1. Expected decline compared to a year ago of $9.3 million ($39.7m) as Stealth changed its Africa strategy in December 2019 to focus on more profitable customers.
2. Underlying EBITDA is a non-IFRS measure. The Company believes that it assists investors understand the underlying performance of the business.
3. Growth Investment activities supports strategies planned to deliver longer term benefit to Shareholders. This involves upcoming launch of two new Online e-stores tailored for customers in trade, retail and business and its e-business platform specifically for business customers; and acquisitions completed and in review.
4. The Company continued its investment in its formative years to build a large-scale business portfolio anticipated to provide uplift in earnings in the medium to longer-term delivering value accretion to Shareholders. An example is the recent acquisition of C&L Tool Centre.

Positive performance despite impact by COVID-19

TRADING PERFORMANCE	1H 2021	2H 2020	1H 2020
Group Revenue	$30.4m	$28.4m	$39.7m
• Australia sales	$28.8m	$25.9m	$30.6m
• UK Sales	$0.2m	$0.2m	$0.4m
• Africa Sales	$1.4m	$2.0m	$8.4m
Gross Profit	28.1%	28.2%	25.4%
Underlying EBITDA	$2.1m	$1.4m	$1.7m
Underlying EBITDA Percentage	6.9%	5.1%	4.4%
Significant Items Growth Investment	$0.9m	$0.8m	$1.0m
Statutory EBITDA	$1.15m	$0.68m	$0.73m
Net Profit/(Loss) After Tax Attributable members	$0.17m	$0.07m	$0.03m

HALF YEAR 2021 - Results Reconciliation

Reconciliation – Full-year financial results	31 December 20 $'000	31 December 19 $'000
Underlying EBITDA[1,]	**2,101**	**1,746**
Growth Related Investments:		
Investment in the establishment of BSA Brands – brand awareness, promotion, point of sale, travel, marketing, sales team[2]	-	(365)
Transaction costs – due diligence, acquisition analysis, bank refinance and other related professional fees[3]	(347)	(278)
Appointment of Senior Personnel (GCFO, CIO, Technology), redundancies and final tenure payments to Heatleys key management relating to acquisition completed in September 2018[4]	(603)	(370)
Statutory EBITDA[1]	**1,151**	**733**
Depreciation	(774)	(713)
Net Finance Costs	(201)	(223)
Profit/ (loss) for the year before tax	**176**	**(203)**
Add back: Minority Interest 50% of the BSA Brands (UK) Limited loss	13	(238)
Profit for the year before tax attributable to Members	**189**	**35**

1 EBITDA (Earnings Before Interest, Tax, Depreciation and Amortisation), Underlying EBITDA and Statutory EBITDA are non-IFRS terms which have not been subject to audit or review; Underlying EBITDA is determined by adding back Growth-Related Investment costs to the Statutory EBITDA which in turn has been determined using information presented in the Group's financial report.

2 Upfront investment in BSA Brands JV to take the Bisley Workwear brand from start-up in the UK market, build brand awareness, meet product compliance conditions and roll out the range into 74 distributor trade store outlets, including brand awareness, promotion, point of sale, travel, marketing and the sales team.

3 Transaction costs are significant and relate to restructure of finance facilities to CBA, opportunities evaluated in detail in the year, which ultimately did not proceed, as well as ongoing opportunities.

4 Includes investments in new strategic programs ahead of earnings return with focus on senior finance, technology, partnerships, joint ventures and acquisition review activity. These appointments pre-empt upfront corporate and strategic actions expected to increase scale with near-term upside. Also includes one-off costs relating to final tenure payments relating to Heatleys acquisition in September 2018 and one-off redundancy costs incurred in reporting period.

HALF YEAR 2021 - Balance Sheet and Cash Flow

HALF YEAR 2021 HIGHLIGHTS

BALANCE SHEET

- Cash position of $2.4m (FY20 $1.1m).
- Net Debt of $3.4m inclusive of $2.5m C&L acquisition debt (FY20 Net Debt $1.4m).
- C&L acquisition added Intangible Assets of $1.5m; increases to all major balances (Receivables, Inventory, Right-of-Use, Payables and Lease Liabilities); and $0.5m to Issued Capital.
- Investment in eCommerce channels that will launch 2H FY21.
- BSA Brands financially self-sufficient, requiring no additional JV partner contribution to working capital during the half-year.

CASH FLOW

- Operating cash inflow of $0.5m (pcp $1.3m outflow) due to improved margins, working capital management, JobKeeper income and reductions to operating cost structure.
- Acquisition of C&L structure included cash ($2.5m) and equity ($0.5m), gross of operational cash on hand ($0.7m).
- Reduced Net Debt exclusive of C&L acquisition debt. Cash and debt balances higher at period end pending change of financier in January 2021, which expanded Group finance facilities to $10.5m (previously $7.4m).

BALANCE SHEET SUMMARY	STATUTORY 31 DEC 2020 $M	STATUTORY 30 JUN 2020 $M	STATUTORY 31 DEC 2019 $M
Cash and cash equivalents	2.4	1.1	1.4
Other current assets	21.3	16.5	22.1
Property, plant and equipment	0.9	0.7	0.7
Other non-current assets (inc AASB16 Leases of $5.6m)	16.1	12.1	12.3
Total assets	**40.7**	**30.4**	**36.5**
Financial liabilities (debt)	5.6	2.4	3.3
Other liabilities (includes AASB16 Leases of $3.5m)	21.7	15.3	20.3
Total liabilities	**27.3**	**17.7**	**23.6**
Total equity	**13.4**	**12.7**	**12.9**

CASHFLOW SUMMARY	STATUTORY 31 DEC 2020 $M	STATUTORY 30 JUN 2020 $M	STATUTORY 31 DEC 2019 $M
Net Cash inflow/(outflow) from operating activities	**0.5**	**0.3**	**(1.3)**
Net Cash inflow/(outflow) from investing activities	**(1.9)**	**(0.8)**	**(0.4)**
Proceeds from issuance of shares and borrowings	3.3	0.8	1.7
Repayment of financial liabilities	(0.6)	(1.2)	(0.6)
Net cash provided by/(used in) financing activities	**2.7**	**(0.4)**	**1.1**
Net increase/(decrease) in cash and cash equivalents	**1.3**	**(0.9)**	**(0.6)**
Cash and cash equivalents at beginning of the period	1.1	2.0	2.0
Cash and cash equivalents at end of the period	**2.4**	**1.1**	**1.4**

STEALTHGLOBAL
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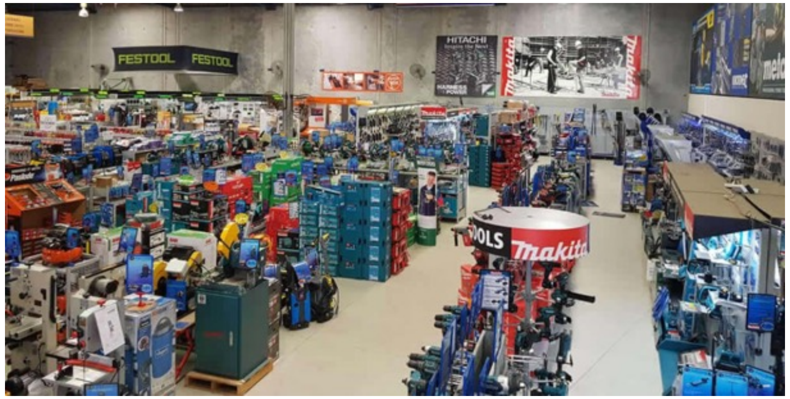
Growth Strategy



25 February 2021
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Our Objective: To Provide a Satisfactory Return to Shareholders in the Long Term

Alignment to growth strategy

We have a clear business strategy that has been consistent since listing, and will create long term value for our shareholders by;

1. Configuring our business to meet the evolving needs of customers.
2. Continuing to grow and develop our core business.
3. Driving top-line and bottom-line results.
4. Implementing leading Online eCommerce.
5. Developing our people through a formal 'learning, training, intern' institute.
6. Working in partnership with leading manufacturers, brands, independents, specialist suppliers.

Our Aim is to be Australia's leading multinational distribution group, as the selected partner for customers, suppliers and independent trade retailers in Australia, United Kingdom and other select international markets. Our Differentiated sales and services model with unparalleled customer service delivers a one-stop-shop for industrial, safety and workplace products and supply chain solutions.

Strategy Execution Track Record

Story Board Since October 2018

ACHIEVEMENTS

- **Continued transformative growth**
- **Established a significantly stronger business through ongoing investments made**
- **New Queensland base by acquiring a market leader C&L Tool Centre**
- **In the past 2 years our annual sales have grown by ~$40 million**
- **Completed 4 acquisitions and established a 50/50 Joint Venture in the UK since October 2018**
- **Added 106 new store locations to our network since March 2019.**

2021

Acquired C&L Tool Centre adding $14m of annual revenue and $1.3m of annual EBITDA.

BSA Brands JV with Bisley Workwear have surpassed total FY20 revenue.

Launched new Bisley Workwear B2C Online e-store in the United Kingdom. www,bisleyworkwear.co.uk

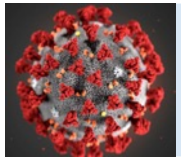
Launched new Vending & Onsite solutions model in Western Australia. 15 new vending machines set up at various sites.

New financing facilities established to $10.5m up from $7.4m to support strategic growth

2020

- FY20 annual sales up 8% pcp
- Australian PPE demand increased.

- FY20 total client accounts up 405 to 11,630, high-level repeat sales.
- FY20 reduced suppliers by 47%.



- February20 COVID-19 response
- UK economy went into lock down.
- 4Q Australia sales down 20.3% pcp
- Removed $1.4m of annual costs.

- October19 changed Africa strategy
- Cancelled high cost-to-serve large customer contract to focus on serving higher margin business.

October19 Acquired the Brand Protect-A-Load (PAL) - Innovative Load Restraint Products.

FY19 trading result with increased Revenue of $40m on pcp FY18.

2019

May19 acquired Industrial Supply Group. Independent member buying group with 27 stores locations Australia-wide.

March19 new distribution partnership with UK's Troy group to place Bisley Workwear into ~420 stores across the UK.

March19 established Joint Venture with Bisley Workwear in the United Kingdom

H1/19 first 6 months trading Sales growth at double digit levels

December18 completed Heatleys integration

- October18 listed on the ASX
- Completed acquisition of Heatley Sales.

How We Are Expanding – Offering More To More Customers

HOW WE GENERATE INCOME & PROFIT TODAY

EXPANSION IN THE COMING YEARS

OFFERING MORE VALUE TO CUSTOMERS

- *Better Unparalleled Customer Experience*
- *Expanded Product Range & Brands*
- *More differentiated Sales, Services & Solutions*
- *Bigger Physical Store Network*
- *New Online e-Business (EDI, eProcurement, Data Insights)*
- *New Online e-Store Channels to Retail & Trade Customers*

FY21 Investments That Deliver Longer Term Value Creation

Programs that will drive sales and profit uplift.

- Enhanced customer experiences, expansion of addressable markets and delivery of operating efficiencies.
- New Online digital capabilities and expansion of supply chain services offering.
- Increased brand reach, new geography, win more customers, more merchandise on offer.
- Existing store reinvestment.
- C&L integration and extract identified revenue and cost synergies.

Business expansion - Continue to strengthen our portfolio and building on capabilities.

- Expand in Australia, increasing scale, in physical presence and through Online e-Stores.
- Launch of our Online e-Business channel to drive higher demand across the Group’s businesses.
- Pursue acquisitions that create more scale, delivering long-term value for shareholders.

eCommerce Digital Channels.

- New SGI corporate website launched in January 2021.
- New UK e-Store ‘Bisley Workwear’ launched in December 2020.
- Upcoming Launch - Online e-Business platform for ‘Heatleys’ business customers early April 2021.
  - EDI, eProcurement, CRM, data insights, webservices.
- Upcoming Launch of Online e-Stores in 2H-2021: two new e-Stores = marketplaces for trade & retail customers.

Extracting Value Through Business Combinations

Acquisition of C&L Tool Centre Successfully Completed 1 December 2020 – Stealth's Fourth Acquisition Since 2018

EXTRACTING VALUE

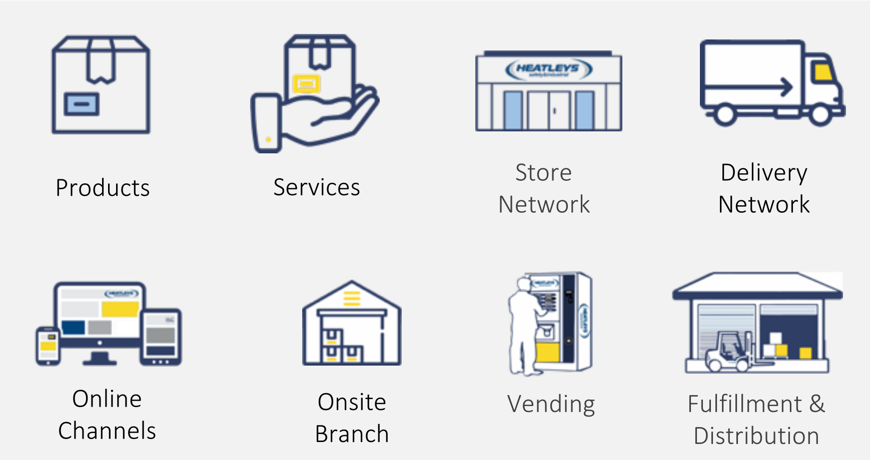
- Purchasing Synergies
- Store & Distribution Efficiencies
- Back Office Integration
- Product Range Extension
- Sharing Best Practice
- Online eCommerce
- Cost and Revenue Synergies

Strategic Priorities

Our Focus in 2021

Serve customers of all sizes and types, increase Sales to existing customers and grow customer base

1. Expansion of store network, product range, geography, marketplaces and refurbish existing stores.
2. Significantly expand our eCommerce digital channels.
3. Continue to build a fully integrated buying experience.
4. Complete value accretive acquisitions, integrate and extract synergies.
5. Deliver more income and profit generating activities through an enlarged business.
6. Develop our people through ‘leadership, training, internship academy’.
7. Enhance operational performance through improved management systems.
8. Continuous focus on safety to provide our team members with a high-quality safe working environment.



Supporting our investment in; eCommerce, product range expansion, bigger store network, distribution centres, a fully integrated customer offering, wider services & solutions on offer, serving all customer types, entering more marketplaces.

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OUTLOOK

25 FEBRUARY 2021
ASX Code : SGI

Outlook

Well Positioned for a Stronger 2H-2021

- Trading performance continued to improve in 1H 2021, and is building momentum, up 7% on 2H 2020.
- Positive sales and earnings momentum expected to continue, with C&L to contribute sales and profit for full six months of 2H 2021.
- Upcoming launch in 2H of new eCommerce channels pushing deeper in Business-to-Business (B2B) and Business-to-Consumer (B2C) marketplaces.
- Bank refinance provides support for further expansion opportunities, aided by increased operating cash inflows from improved performance and C&L acquisition.
- The continued impact of COVID-19 and potential government responses presents uncertainty for the operating environment.

Stronger Customer Activity

- Positive high level of tender and quoting momentum with uplift expected from improving business conditions.
- Australian larger customer projects are steadily increasing after COVID-19 delays.
- Australian small-to-mid tier customer spend activity has been robust and is improving with stronger demand in Western Australia and Queensland.
- BSA Brands 1H-21 sales & profit is noticeably better surpassing FY20 sales and profit, albeit that the UK market continues to be challenged by COVID-19.

Acquisition of C&L Tool Centre

- Integration and synergy work has commenced. Sales and earnings in the first 2 months are up approximately 10.5% compared to last year.
- C&L will add to the group annual sales of $14m and annual EBITDA $1.3m.

Compelling Investor Value Proposition

INVESTMENT HIGHLIGHTS

Long-term strategy, portfolio and prospects remains intact.

- Share price not reflecting the full value and potential of the company's aspirations, where we aim to outperform.
- Remains on track for longer term growth target of $200m revenue @ 8% EBITDA. Organic growth-related programs and further acquisitions will be integral to achieving this.
- Differentiated sales and services model & emerging Industry leading position in a large, fragmented, highly-attractive market.
- Competitively advantaged diversified portfolio with repeat customers and end markets coverage.
- Improved economic stimulus supports sales activity toward infrastructure, building, construction and mining sectors.

We are optimistic of favourable market share gain driven by;

- Experienced and committed board, management and team members – who also own 23% of the company.
- Significantly expanding our eCommerce, store & distribution network and geographic footprint.
- Innovative customer acquisition and retention capabilities.
- Multiple levers for growth impacted by organic and strategic events.
- A commitment to growth principles driven by an outstanding employee culture.
- A demonstrated disciplined approach to capital management and business investment.

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THANK YOU

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