

1H25 FINANCIAL RESULTS

24 FEBRUARY 2025



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1. KEY MESSAGES & METRICS

JONATHAN RUBINSZTEIN

CHIEF EXECUTIVE OFFICER

NUIX: OUR FOUNDATION FOR GROWTH



Nuix creates **intelligent software** to enable our customers to identify risk, evidence and value in large amounts of unstructured and structured data

400+
EMPLOYEES

\$216.2m

ANNUALISED
CONTRACT
VALUE

97%
from subscription
licences

85%

have a tenure
with Nuix of
> 5 YEARS
CUSTOMERS

OUR PLATFORM – centred around our world leading data processing engine, amplified with AI and simplified with enterprise automation

OUR CUSTOMERS – leading global and local government agencies, law firms, corporates and advisories

OUR REACH – offices, experts and partners in key business and political centres

CREATING VALUE – we sell our platform in three customer-centric solutions:

- Data Privacy
- Forensic Investigations
- Legal Processing & Review

1H25 KEY MESSAGES

1. ACV growth in line with recent update¹
2. Further growth in Cash EBITDA
3. Continued momentum in Nuix Neo rollout
4. Lift in Research & Development investment to drive future growth
5. Underlying cash flow positive
6. Cash balance \$30.7m

Notes: 1. See [ASX Announcement 28 January 2025](#)

1H25 KEY FINANCIAL METRICS

Annualised Contract Value (ACV)¹

\$216.2m

▲ Up 8.3% on 1H24

Statutory Revenue

\$105.2m

▲ Up 6.9% on 1H24

Net Dollar Retention

109.6%

▼ Down 0.5% on 1H24

Cash EBITDA²

\$13.4m

▲ Up 30.6% on 1H24

Underlying EBITDA

\$27.1m

▼ Down 4.5% on 1H24

Statutory EBITDA

\$15.3m

▼ Down 10.8% on 1H24

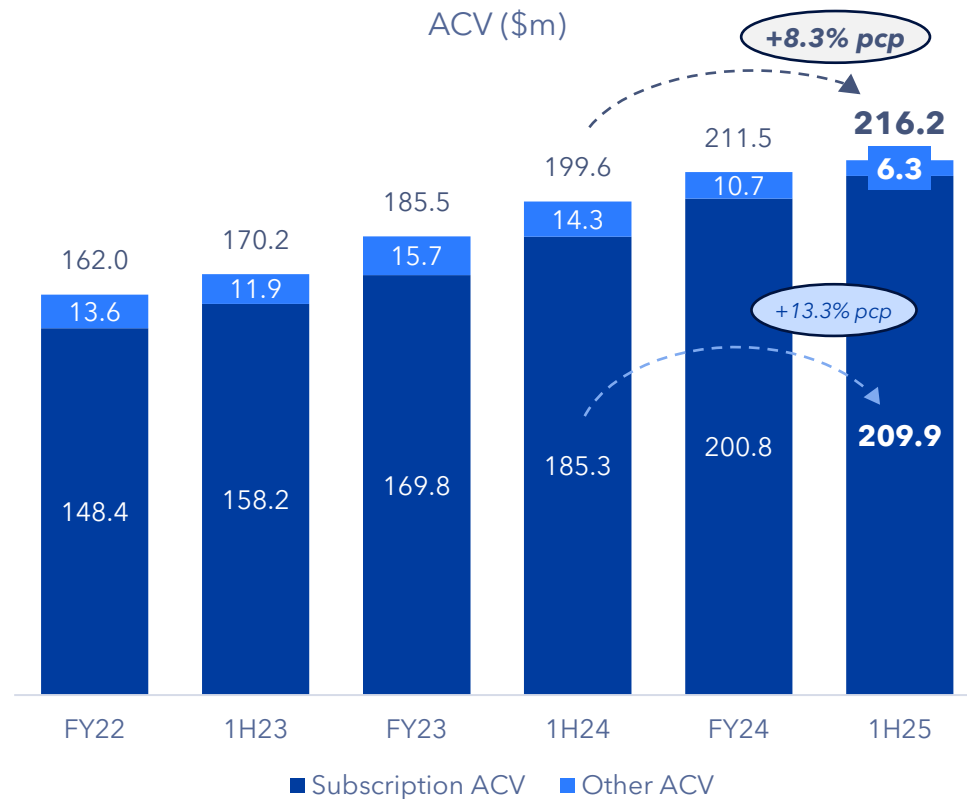
Notes: 1. Refer Glossary for definitions of Annualised Contract Value (ACV) and Net Dollar Retention
2. See pages 15 and 16 for further information on EBITDA
Constant Currency Comparisons are provided in the financial results section

2. FINANCIAL RESULTS

PETER MCCLELLAND
CHIEF FINANCIAL OFFICER

ANNUALISED CONTRACT VALUE (ACV)

Lift in Subscription ACV partially offset by fall in Other ACV



1H25 ACV

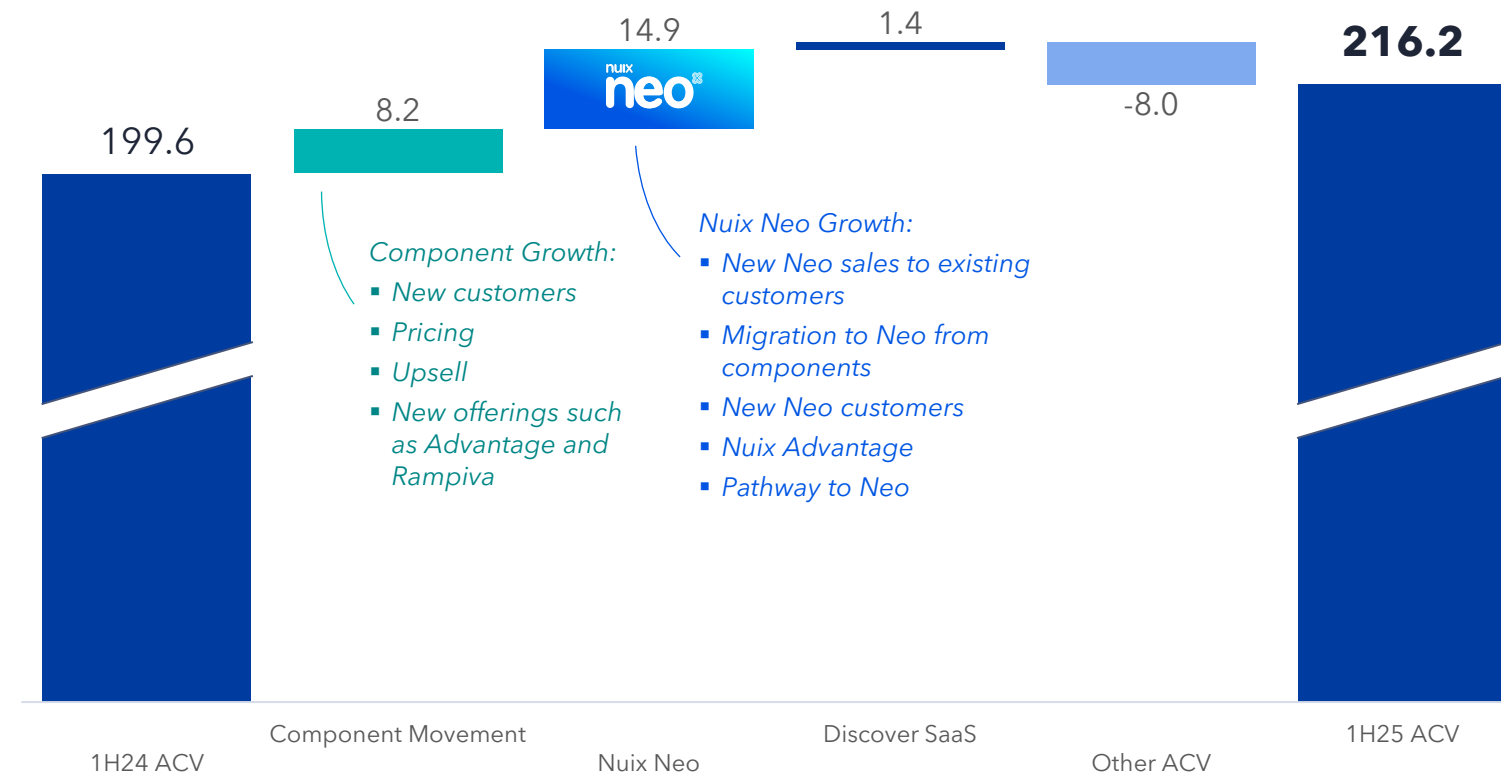
\$216.2m, up 8.3% as at 31/12/24

- > Total ACV up 8.3% on pcp, up 8.2% in constant currency¹
- > ACV up 2.2% from June 24, up 2.1% in constant currency
- > ACV growth characterised by lift in Subscription ACV², representing recurring ACV, partially offset by a fall in Other ACV
- > Subscription ACV rose by 13.3%, amounting to 97% of Total ACV, up from 93% in pcp
- > Other ACV lower in line with strategy of moving away from Perpetual licences, along with lower Services

Notes: 1. Refer page 37 for comments on constant currency calculation
2. Refer Glossary on page 36 for definitions of Subscription ACV and Other ACV

ACV GROWTH DRIVERS

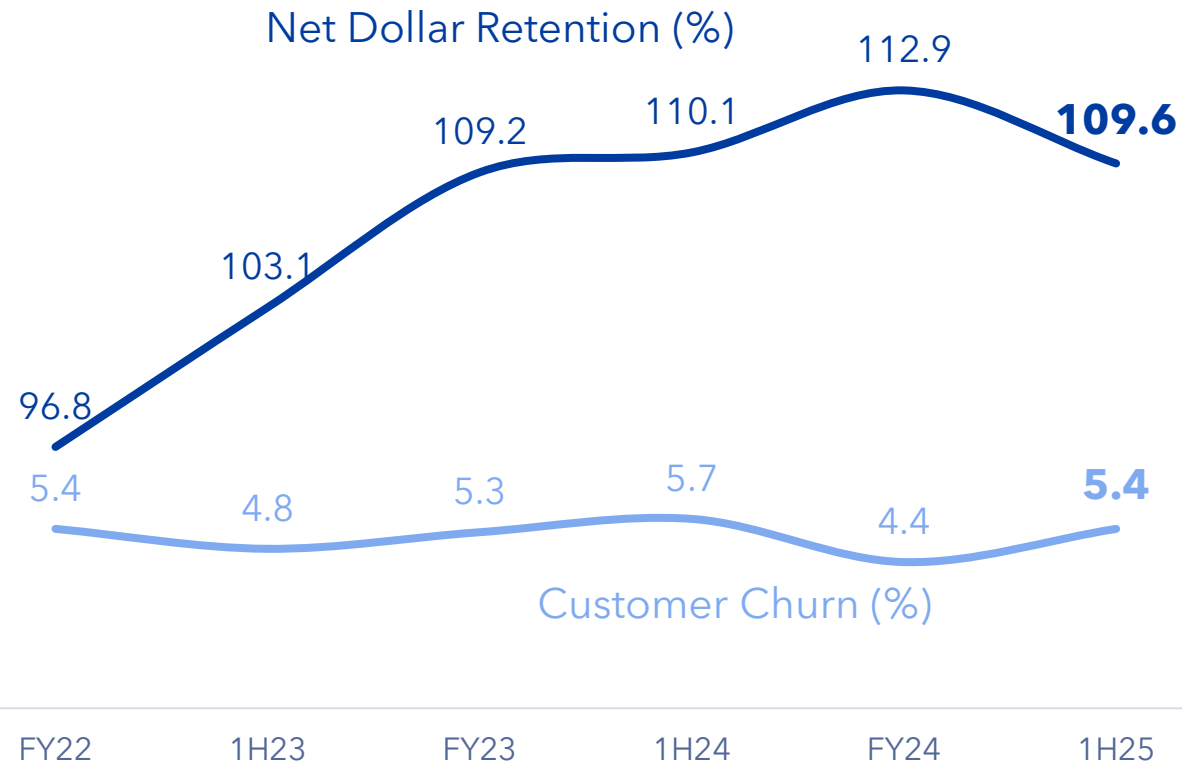
Nuix Neo a key growth driver



- > Traditional Component sales higher on customer upsell, further growth in Rampiva and Advantage, incorporating significant growth in key accounts
- > Nuix Neo a significant contributor to growth, rising to ACV of \$18.9m and 46 customers
- > Discover SaaS growth partly offset by some churn in smaller customers along with the conclusion of several finite projects
- > In line with strategy, other ACV down on lower Perpetual licences as well as lower one-off Service sales compared to previous year

NET DOLLAR RETENTION & CHURN

Increasing complexity and size of transactions

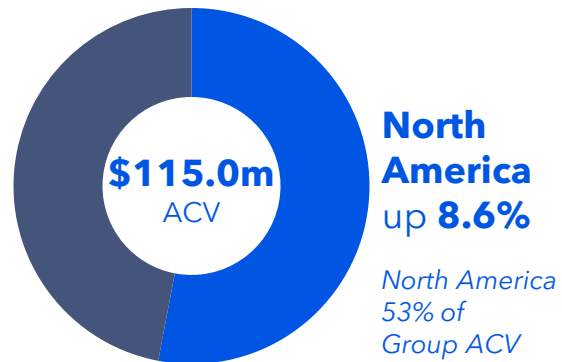


- > NDR reflects the lift in ACV achieved from Nuix's existing customer base over a 12-month period
- > Net Dollar Retention (NDR) of 109.6%, down on lower overall levels of upsell, uptick in churn from the prior half and some slipped renewals
- > Increasing transaction size and complexity, together with the shift from component to platform, is contributing to longer procurement cycles for some customers
- > This affects both converting existing customers and attracting new ones, making revenue and ACV forecasts less predictable in the short term
- > Customer churn 5.4%¹ with some uplift in North America in Corporate and a single large customer churn in EMEA on completion of project

Notes: 1. Customer churn is a component of NDR, with lower churn beneficial to NDR

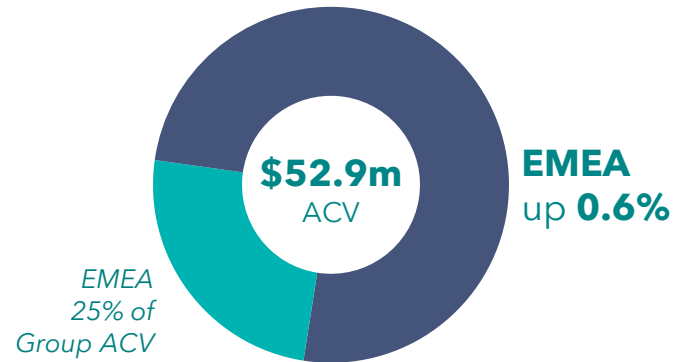
REGIONAL ACV

Strong performance in Asia Pacific



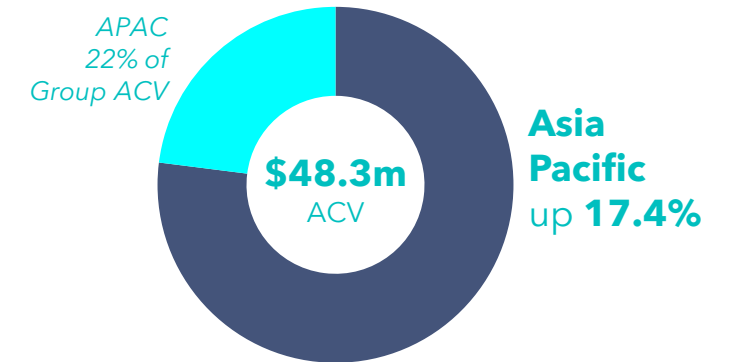
North America

- > North America ACV up 8.6% on pcp, up 8.7% in constant currency¹
- > Good upsell achieved in Advisory and Government, partly offset by fall in non-recurring services and roll-off of perpetual licence sales
- > Continued Nuix Neo sales across all sectors



EMEA

- > EMEA ACV up 0.6% on pcp, up 0.2% in constant currency
- > Upsell achieved in Government offset by loss in Corporate on project completion
- > Nuix Neo sales gaining momentum with particular success in Neo Investigations



Asia Pacific

- > APAC ACV up 17.4% on pcp, up 17.3% in constant currency
- > Strong upsell in Corporate and Government
- > Nuix Neo success in Corporate across both existing and new customers, including significant multi-solution deal

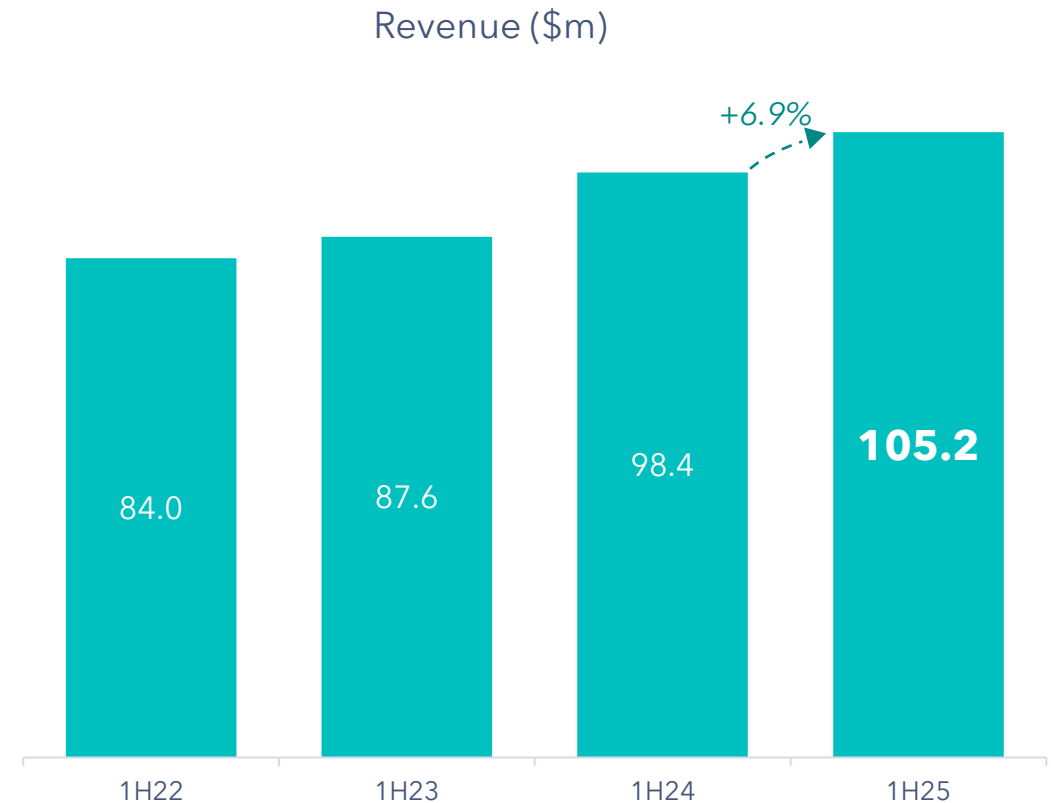
Notes: 1. Refer page 37 for comments on constant currency calculations

REVENUE

Key contracts renewed with uplift, fall in proportion of multi-year deals

1H25 REVENUE \$105.2m, up 6.9%

- > Revenue up 6.9% on pcp, up 7.4% in constant currency¹
- > Multi-year deals represented 22% of revenue, down from 24% in pcp
- > Subscription revenue², an indicator of recurring revenue, at 94%, in line with pcp
- > Renewals achieved with key Advisory, Government and Corporate customers
- > Statutory Revenue gains driven by Asia Pacific and North America, with EMEA lower given significant multi-year deals in the pcp



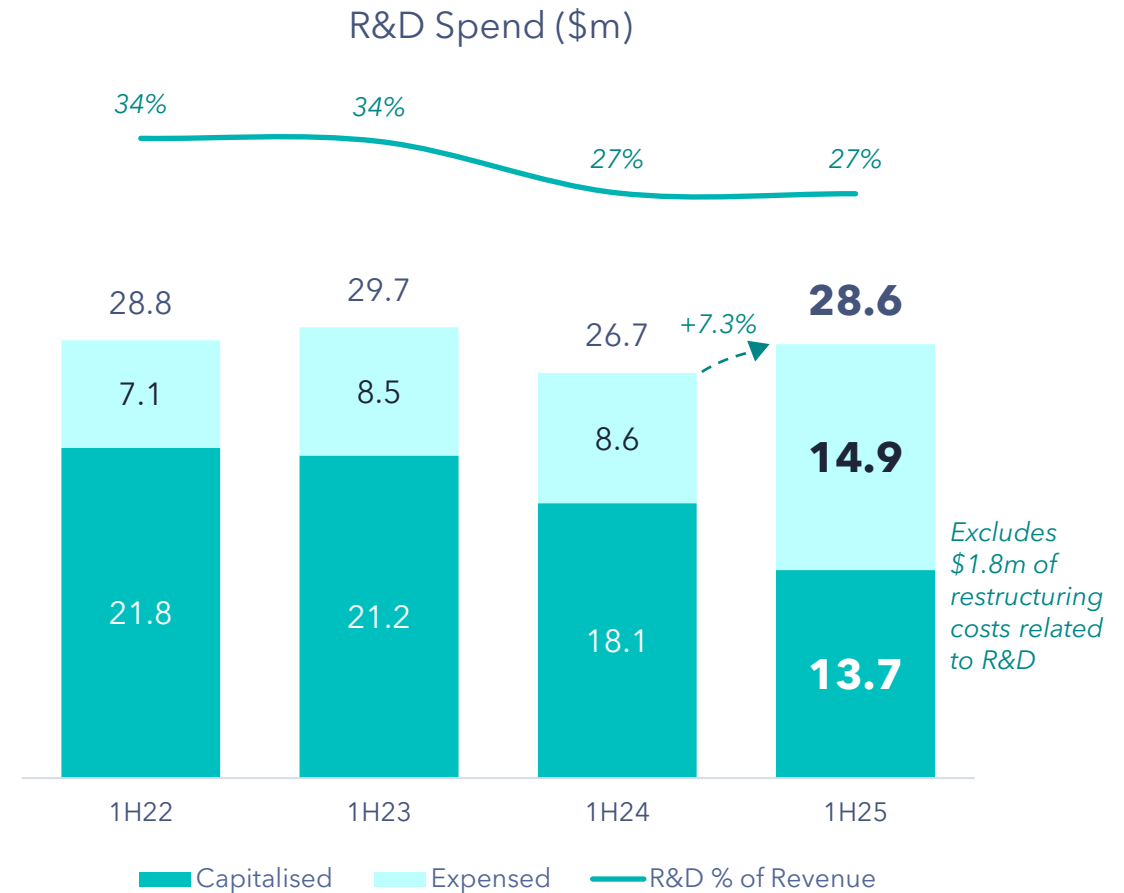
Notes: 1. Refer page 37 for comments on constant currency calculations

2. Refer pages 33 & 34 for more information on licence types, including components of Subscription Revenue

RESEARCH & DEVELOPMENT

Lift in investment with large change in expensed component

- > Research & Development spend up by 7.3% on pcp, excluding \$1.8m of restructuring costs related to R&D to drive efficiency gains into future periods
- > Increase in R&D investment during the period driven by:
 - > Continued focus on near term core development areas including Nuix Neo, product components and Discover SaaS
 - > Advancements in Horizon 3 capabilities such as Gen AI and Deep Learning Framework
 - > Further improvements in customer centric outcomes and operational improvements
- > Much higher expensed proportion of R&D due to increased activity on customer improvements and further research on new development opportunities
- > Capitalised component of R&D significantly lower, at 48%
- > Research and Development investment funded from underlying cash flow



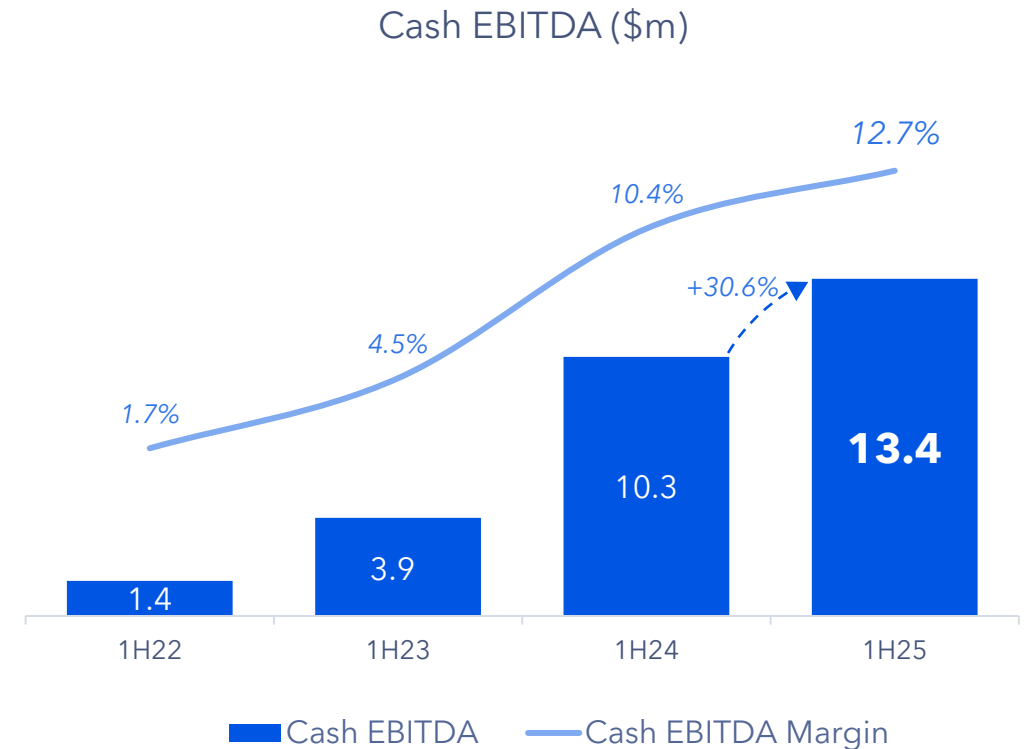
CASH EBITDA

Lift in Cash EBITDA and margin, in line with objective

1H25 CASH EBITDA

\$13.4m, up 30.6%

- > Cash EBITDA incorporates the full Research & Development investment spend, including capitalised component, but excludes net non-operational legal costs and restructuring costs
- > Cash EBITDA margin increased further, rising to 12.7% in 1H25, from 10.4% in pcp
- > Aligns with full year objective for revenue growth to exceed operating cost growth

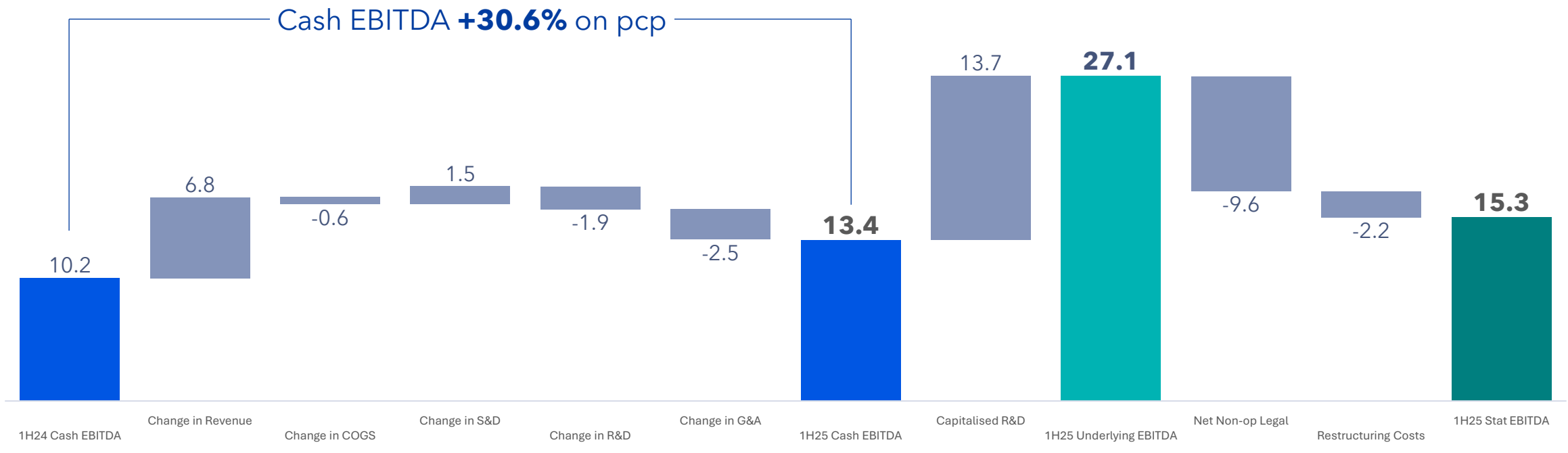


EBITDA

Cash EBITDA up 30.6%, with revenue growth in excess of operating cost growth

Net non-operational legal costs lower than pcp

One-off restructuring costs also impacted Statutory EBITDA



\$ millions	1H25	1H24	Change ⁵
Software Revenue	99.5	94.7	5.2%
Other Revenue	5.6	3.8	49.0%
Total Revenue	105.2	98.4	6.9%
Cost of Goods Sold	-10.7	-10.1	-5.9%
Gross Profit	94.5	88.3	7.0%
<i>Gross margin</i>	<i>89.8%</i>	<i>89.7%</i>	<i>+0.1%</i>
Sales and Distribution	-31.8	-33.2	4.4%
Research and Development	-28.6	-26.7	-7.3%
General and Administrative	-20.7	-18.2	-13.9%
Operating Expenses	-81.1	-78.1	-3.9%
Cash EBITDA¹	13.4	10.3	30.6%
<i>Cash EBITDA margin</i>	<i>12.7%</i>	<i>10.4%</i>	<i>+2.3%</i>
Capitalised Development Costs	13.7	18.1	24.4%
Underlying EBITDA²	27.1	28.4	-4.5%
<i>Underlying EBITDA margin</i>	<i>25.8%</i>	<i>28.8%</i>	<i>-3.0%</i>
Net Non-Operational Legal Costs ³	-9.6	-11.2	14.5%
Restructuring Costs ⁴	-2.2	0.0	-100.0%
Statutory EBITDA	15.3	17.2	-10.8%
<i>EBITDA margin</i>	<i>14.6%</i>	<i>17.5%</i>	<i>-2.9%</i>
Depreciation & Amortisation	-27.9	-23.3	-19.9%
EBIT	-12.6	-6.1	-106.3%
Net Finance income (expense)	1.7	1.0	73.8%
Profit/Loss Before Tax	-10.9	-5.1	-112.4%
Tax Benefit	0.5	0.3	-64.1%
Profit/Loss After Tax	-10.4	-4.8	-115.4%

INCOME STATEMENT

Cash EBITDA up 30.6%, with revenue growth exceeding operating cost growth

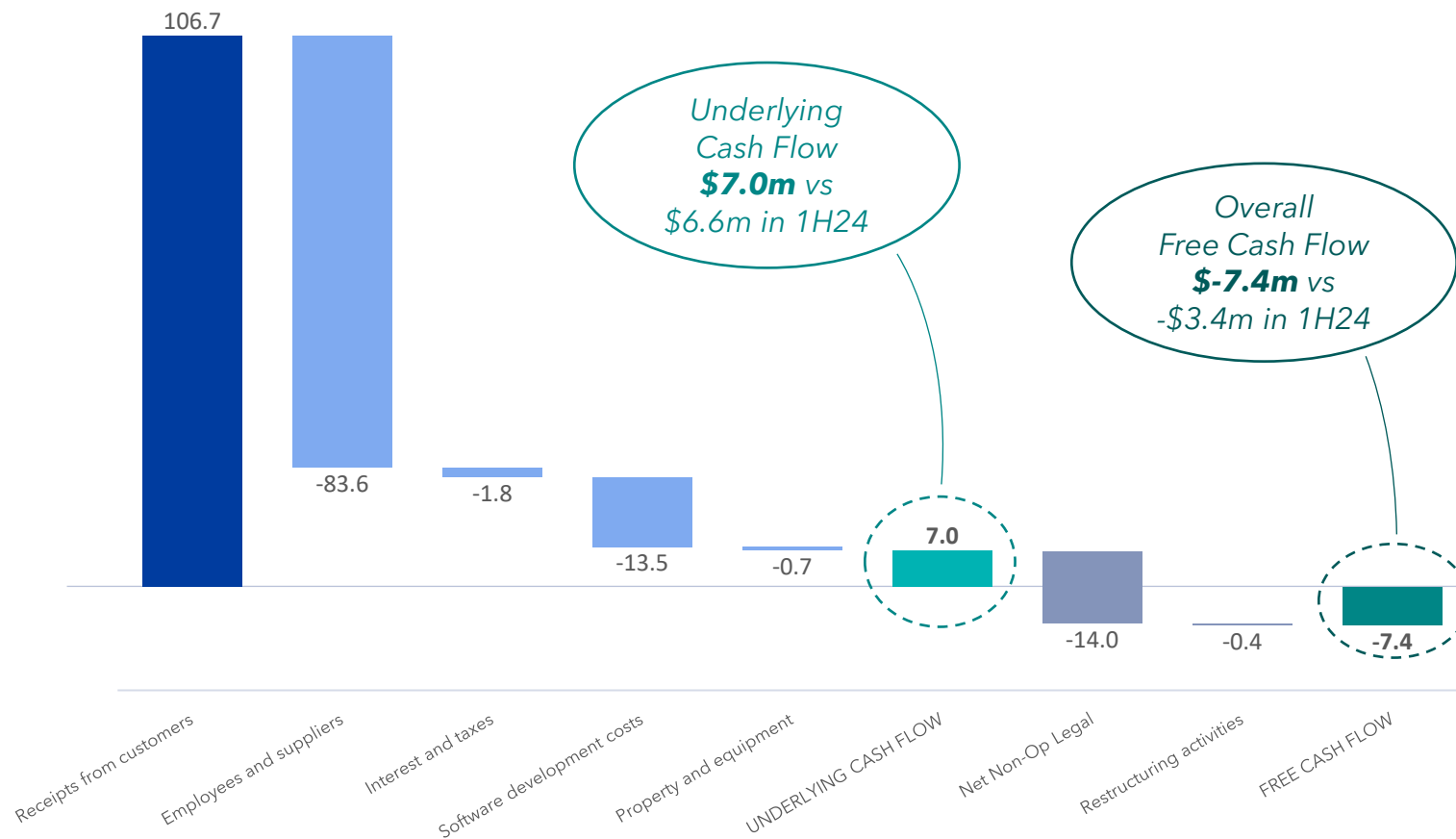
- > Statutory Revenue gains driven by Asia Pacific and North America, with EMEA lower given significant multi-year deals in the pcp
- > COGS higher on increase in Support/Tech Ops headcount and related subscriptions
- > Sales and Distribution costs lower - headcount up slightly despite some reallocation to R&D; increase in marketing spend, but lower commission payments on lower ACV growth
- > Research and Development costs incorporate headcount reallocation, noting a marked increase in the expensed component due to higher focus on customer improvements and research for new development opportunities
- > General and Administrative higher on increased headcount in Legal and People & Culture teams, strengthening the team for growth, and tech subscriptions to drive future efficiencies
- > Net non-operational legal costs mostly attributable to Class Action during the period

Notes:

1. Cash EBITDA incorporates the full Research & Development investment spend, including capitalised component, but excludes net non-operational legal costs and restructuring costs
2. Underlying EBITDA excludes net non-operational legal costs and restructuring costs, and includes only the expensed component of R&D investment
3. See Glossary on page 36
4. Restructuring costs across R&D and related areas
5. Positive percentage change indicates improvement

FREE CASH FLOW

Underlying cash flow positive, in line with objective



- Positive underlying cash flow, in line with full year objective
- As in prior years, software development costs funded from free cash flow
- Net non-operational legal payments \$14.0m

3. STRATEGY UPDATE

JONATHAN RUBINSZTEIN

CHIEF EXECUTIVE OFFICER



LAUNCHED FY24

Nuix Neo™ is an **AI-enriched single platform** that helps customers identify, process and understand complex data, in ways that are...

FASTER

DO MORE, SAVE TIME

On-demand scalability and significant efficiency benefits for users

EASIER

REDUCE FRICTION

End-to-end, web-based, automated, template-driven platform

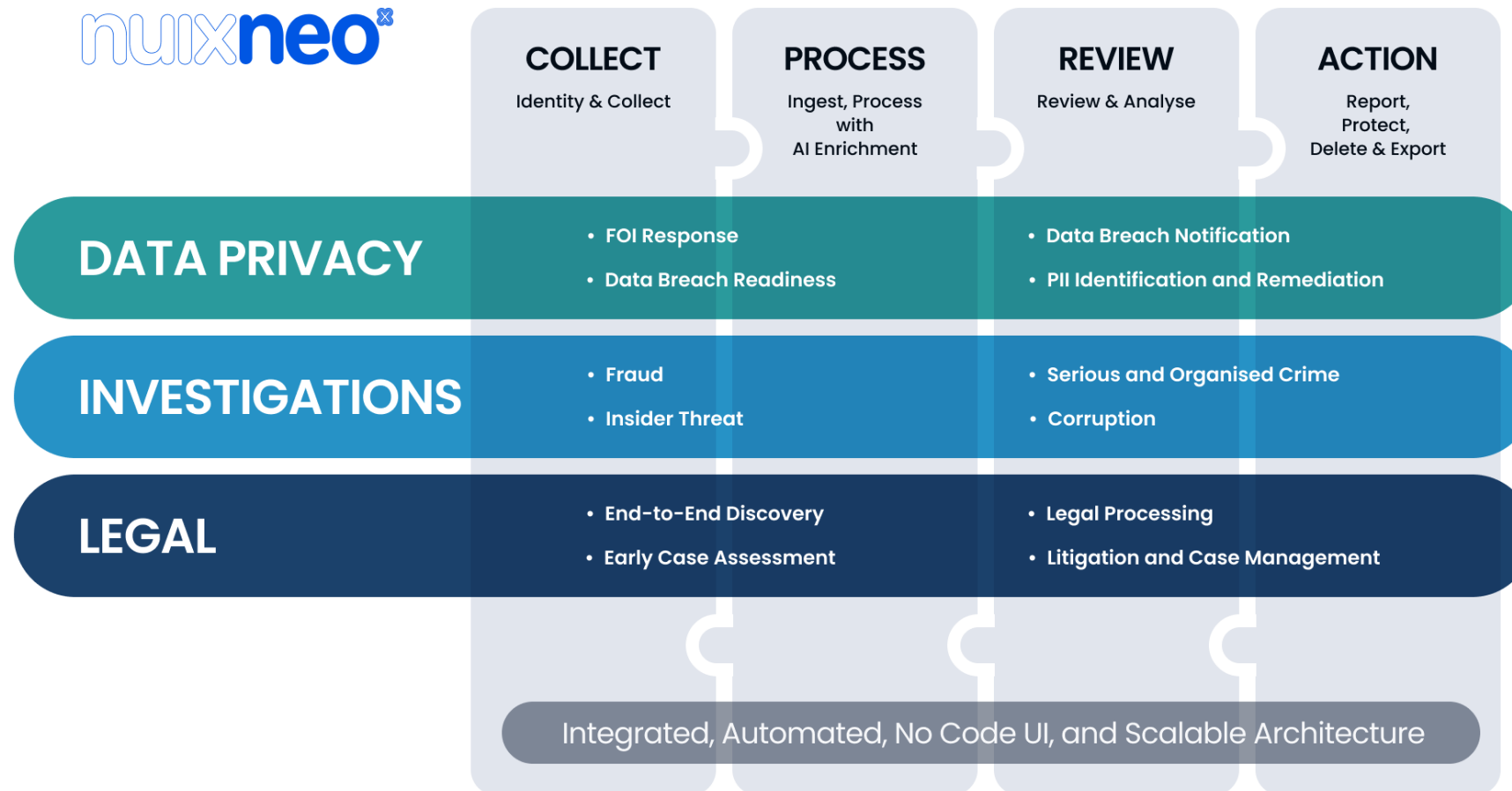
SMARTER

AI ENRICHED SOLUTIONS

Leverages Nuix AI to risk-assess and prioritise most relevant information

NUIX NEO

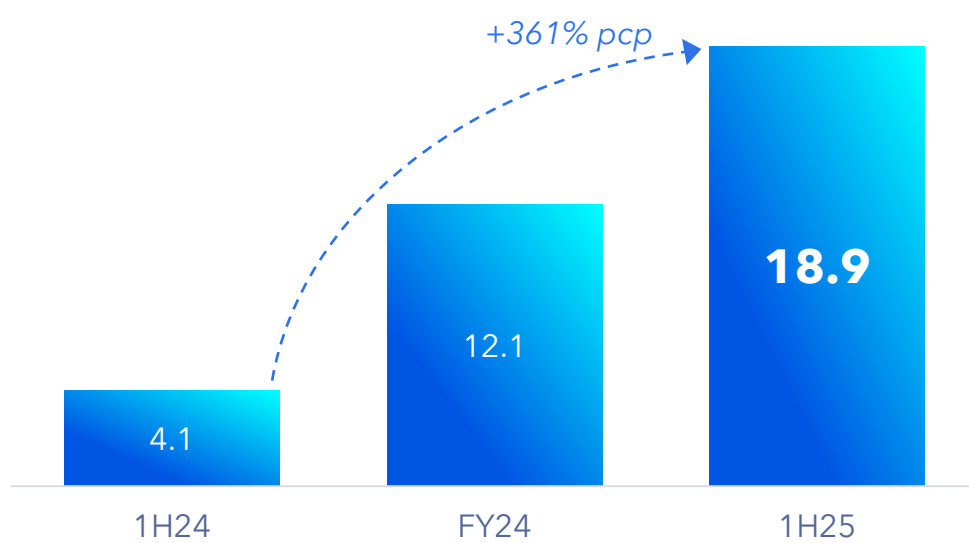
One platform for a broad range of complex data challenges



NUIX NEO ACV

Further rollout momentum

Nuix Neo ACV (\$m)



1H25 NUIX NEO ACV

\$18.9m, up +361% as at 31/12/24

- > Expanded to 46 customers during 1H25, from 23 at the end of FY24
- > Continuation of trend of new, incremental Neo solutions taken up by existing customers, alongside other Nuix products
- > Particular strength in Nuix Neo Investigations sales
- > Significant customer win incorporating several Neo solutions
- > New customers to Nuix in each region
- > Average New Nuix Neo sale is 2-3x the size of non-Neo sale

TECHNOLOGY DELIVERY UPDATE

Significant ramp up in 2H customer delivery

2H25

Discover SaaS AI
Cognitive AI Capabilities

V10
Upgrades to Engine, Workstation and Investigate

FLUX
neo[®] Semantic Search
From Keywords to Concepts

FLUX
neo[®] Expanded Solution Capabilities
Updated Dashboards, Further AI models including non-English Markets, Automated Workflows

FLUX
neo[®] Deployment: Nuix Neo Local
Rapid Deployment Capability

TECHNOLOGY RESTRUCTURE

Consolidating technology into core locations to drive efficiencies

- > Restructure of Product and Technology teams, aligning to a solutions-based model
- > Project involves:
 - > consolidating development hubs and spend globally
 - > reinvesting into additional roles in Sydney, Washington DC, London and India (through technology partner)
- > Consolidates locations and strengthens focus on primary offices in Australia, the US and UK, providing increased capability within the overall cost envelope
- > Streamlines delivery by reducing cross-region interdependencies and co-locating teams working on the same solution
- > Improves customer support by bringing customer-facing teams together
- > One-off expenses all taken in 1H25; project operating cost neutral into FY26 while delivering stronger operating efficiencies, scalability and speed of execution

Core Technology locations:

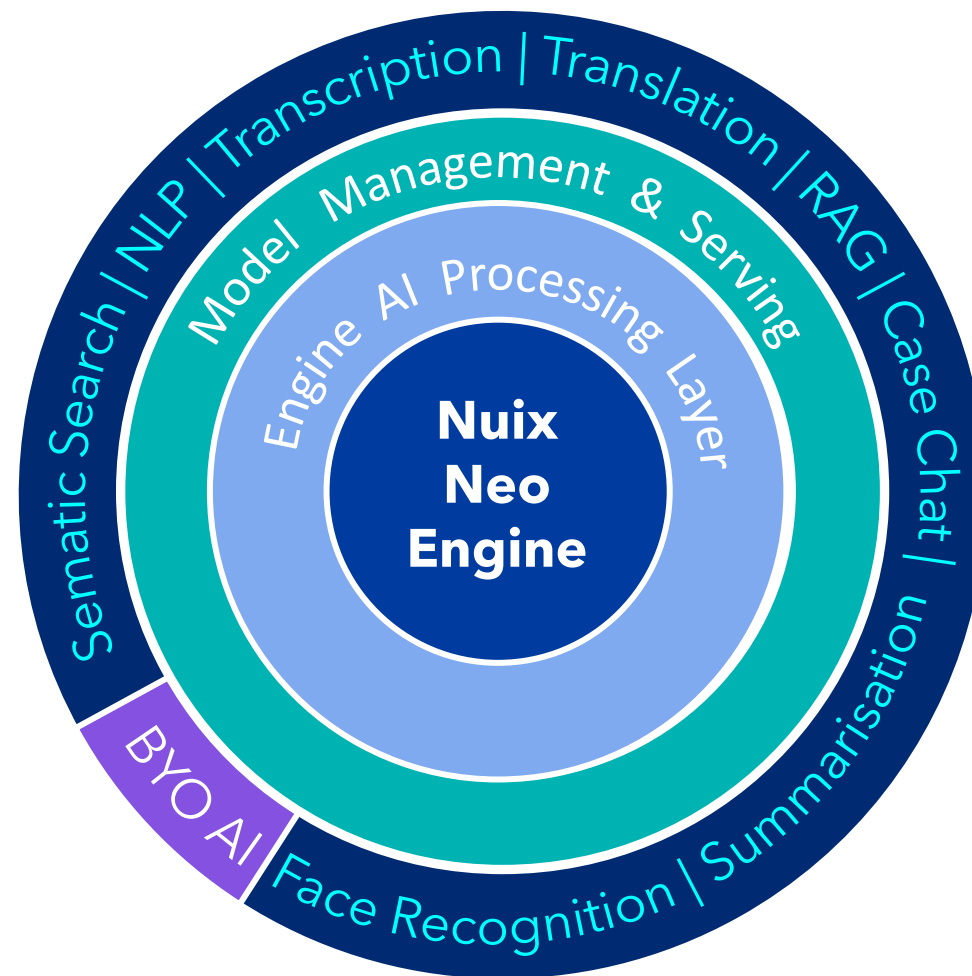
- Sydney, Australia
- Washington DC, USA
- Pittsburgh, USA
- London, UK
- Hyderabad, India (tech partner)



DEEP LEARNING FRAMEWORK

UNLOCKS
FUTURE
CAPABILITIES
AND
OPPORTUNITIES

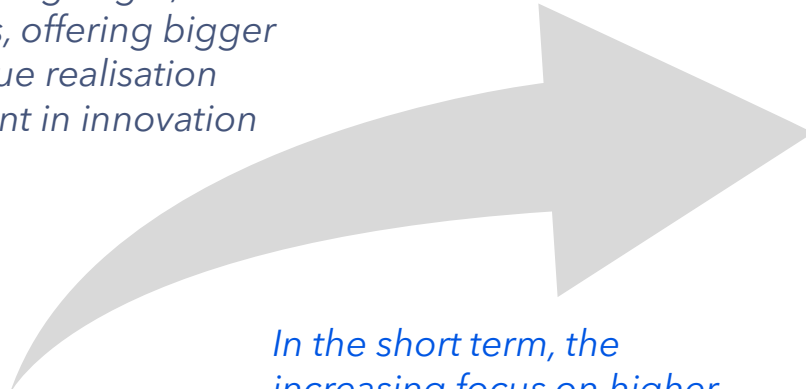
Nuix has enhanced its unparalleled data analytics capabilities with the Nuix Neo **Deep Learning Framework** which incorporates newly patented technology and enables customers to seamlessly connect with their preferred AI models for smarter data analysis



SHIFTING FURTHER TO HIGHER VALUE CONTRACTS

Leveraging NuiX's technology advantage for value

Nuix is deliberately targeting larger, more enterprise-style contracts, offering bigger customers significant value realisation through further investment in innovation



Traditional
Component Sales

In the short term, the increasing focus on higher value contracts has meant the lengthening of the procurement cycle for some customers

nuiX
neo

- Larger, more complex contracts
 - Platform Solutions
- Deep Learning Framework

*Further leverage
Nuix's powerful technology
to take full advantage of
rapid growth in data volumes
and
**evolving methods of extracting
further meaning from complex
data sets***

4. OUTLOOK

JONATHAN RUBINSZTEIN

CHIEF EXECUTIVE OFFICER

OUTLOOK

STRATEGIC TARGETS FY25:

- Current expectation is for 11% - 16% ACV growth in constant currency¹
- Continued successful rollout of Nuix Neo
- Revenue growth to exceed operating cost growth²
- Underlying Cash Flow positive for the full year



Q&A

APPENDIX

BALANCE SHEET

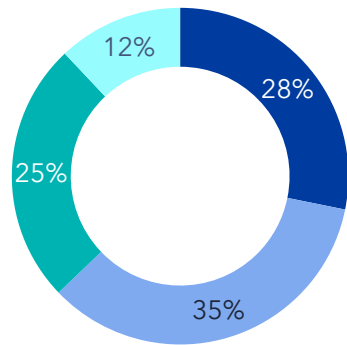
- > Cash Balance \$30.7m
- > Trade receivables increased due to the timing of billing for certain multi-year deals, and contracts closing in December 2024
- > Contract assets rose in line with revenue growth during the half
- > Deferred tax and lease liabilities decreased due to a reduction in the lease term for a US-based office
- > Deferred revenue increased mainly as a result of early contracting, billing and cash receipt for a licence renewal with a large government customer
- > Provisions increased due to restructuring activities
- > Other liabilities include the remaining deferred consideration for the acquisition of Rampiva, to be settled in shares over the next 18 months
- > \$30m bank facility: \$746k utilised for the issue of bank guarantees

\$ millions, as at	31 Dec 24	30 Jun 24
ASSETS		
Cash and cash equivalents	30.7	38.0
Trade and other receivables	40.6	35.2
Contract assets	59.2	53.3
Other current assets	8.9	10.5
Property, plant and equipment	2.3	2.3
Intangibles	239.8	243.9
Deferred tax assets & lease assets	13.2	13.8
Total assets	394.7	397.0
LIABILITIES		
Trade and other payables	22.0	34.8
Deferred tax and lease liabilities	14.2	18.4
Deferred revenue	57.4	46.1
Provisions	6.3	4.4
Other liabilities	3.0	6.7
Total liabilities	102.9	110.4
EQUITY		
Issued capital	379.4	376.9
Reserves	(138.5)	(151.6)
Retained earnings	50.9	61.3
Total equity	291.8	286.6

CUSTOMER BASE

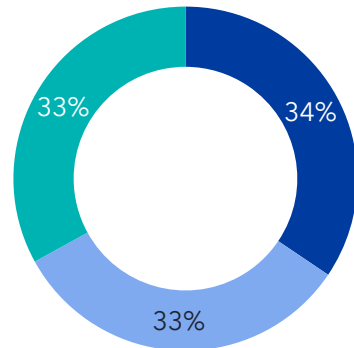
Long tenured, well-diversified customer base

ACV by Industry Group



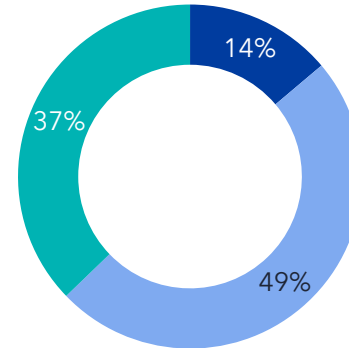
- Advisories
- Government
- Corporate
- Law Firms

Customer Concentration



- Top 20 customers
- Top 21-100 customers
- Remaining customers

Customer Tenure



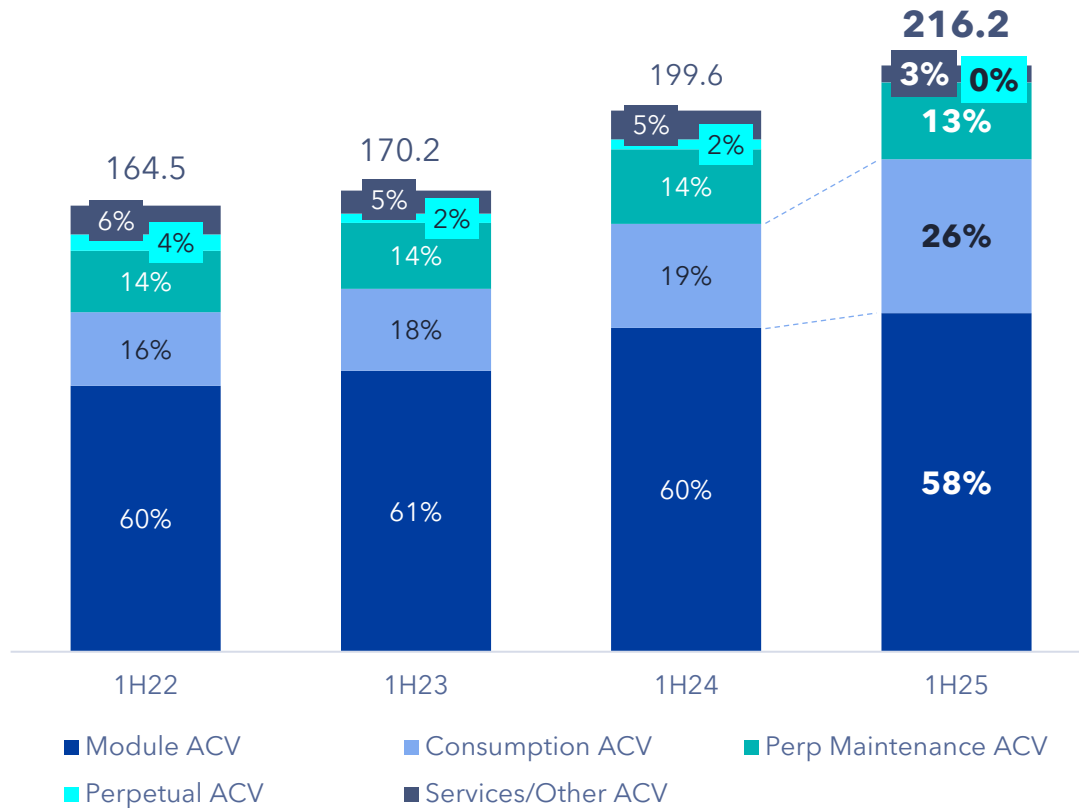
- <5 Years
- 5-10 Years
- 10+ Years

- Over 80% of ACV generated outside Australia
- No customer represents more than 4% of ACV
- 37% of ACV derived from customers with a tenure over 10 years

ACV BY LICENCE TYPE

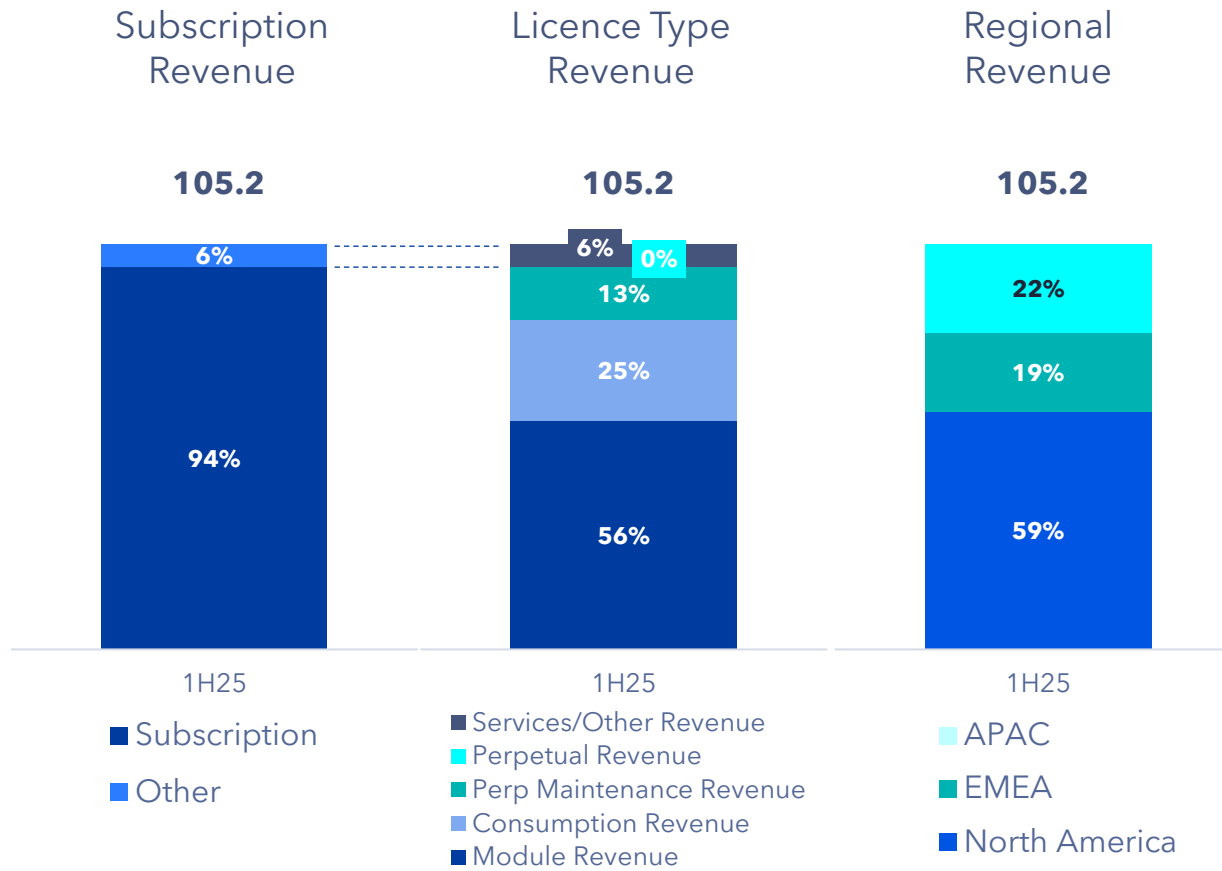
Further lift in Consumption driven by Nuix Neo

ACV by Licence Type



- > Consumption licences continue to grow as a proportion of total ACV, driven by Nuix Neo in particular, in line with strategy
- > Perpetual sales negligible, also in line with strategy

STATUTORY REVENUE COMPONENTS



- > Statutory revenue includes the majority of multi-year deal revenue up front, while ACV smooths multi-year deal contracts across relevant years
- > Subscription revenue, which reflects the generally recurring component of revenue, represented 94% of total revenue
- > 'Other' revenue incorporates Perpetual Sales and (non-Advantage) Services revenue
- > In line with strategy, Perpetual sales decreased to essentially zero in the half
- > The Support & Maintenance revenue associated with prior Perpetual sales is ongoing
- > Consumption licences represented 25% of total revenue

REVENUE MIX AND LICENCE TYPES

Revenue Type	Software Revenue (94% 1H25 Total Revenue)				Other Revenue (6% 1H25 Total Revenue)
Software Licence	Subscription (94% 1H25 Total Revenue)			Perpetual Sales (0% 1H25 Total Revenue)	Hardware/ Services (6% 1H25 Total Revenue)
	Module	Consumption	Perpetual Maintenance		
Primary Volume Drivers	Number of Module Licenses	Gigabytes processed or under management	Perpetual Licences held	Perpetual Licences held	Ad-hoc
Typical Pricing / Tenure Model	Annual / Multi Year Deals (MYD)			Upfront fee <i>Often paired with Subscription Maintenance</i>	
	Generally priced on an annual "cost per Core" or "cost per user" basis	Tiered "cost per gigabyte" processed (often with minimum volume commitments) or "cost per user" basis	Priced on a "cost per Perpetual Licence" basis	Priced on a one time "cost per Core" basis	

- > Subscription Revenue is recurring in nature and includes Module, Consumption and Perpetual Maintenance
- > Software Revenue comprises all Subscription Revenue, along with new Perpetual Sales licence revenue

LICENCE TYPE IMPLICATIONS ON REVENUE RECOGNITION

Delivery model	Licence type	1 year licence example Impact in month 1	3 year MYD licence example Impact in month 1	
On-premise or customer-hosted cloud	Subscription or Consumption licence (including Nuix Neo) ¹	<p>1.2 Statutory, 1.2 ACV</p>	<p>3.6 Statutory, 1.2 ACV</p>	<ul style="list-style-type: none"> \$1.2m on-premise module licence - 1 year \$3.6m on-premise module licence - 3 years (typically an up-front payment discount)
	Perpetual	<p>1.2 Statutory, 1.2 ACV</p>	N/A	<ul style="list-style-type: none"> \$1.2m perpetual licence
Nuix-hosted cloud	Nuix SaaS	<p>0.1 Statutory, 1.2 ACV</p>	<p>0.1 Statutory, 1.2 ACV</p>	<ul style="list-style-type: none"> \$1.2m Discover SaaS consumption licence - 1 year \$3.6m Discover SaaS consumption licence - 3 years
Other	Maintenance	<p>0.1 Statutory, 1.2 ACV</p>	<p>0.1 Statutory, 1.2 ACV</p>	<ul style="list-style-type: none"> \$1.2m maintenance subscription - 1 year \$3.6m maintenance subscription - 3 years
	Professional services ²	<p>1.2 Statutory, 1.2 ACV</p>	N/A	<ul style="list-style-type: none"> \$1.2m professional services

1. Excluding the impact of recognising related support and maintenance over time
 2. Assuming completion and acceptance of services delivered

GLOSSARY

- 1) **Annualised Contract Value (ACV)** is an adjusted, non-IFRS measure and does not represent Total Revenue in accordance with AAS or Nuix’s accounting policies or cash receipts from customers. ACV is used by Nuix to assess the total contract value of its software contracts on an annualised basis (removing fluctuations from Multi-Year Deal contracts in Nuix’s Total Revenue which results from its revenue recognition policies). The calculation of ACV at the end of the relevant financial period adjusts Total Revenue to account for: A) Revenue generated from Subscription Licences with a term of 12 months or more, as well as Consumption Licences which exist at the end of the relevant financial period as if those contracts’ revenues were generated (and recognised) in each financial year on a rateable basis over the relevant contract period, expressed on an annualised basis B) last 12 month contribution from short term Software Licences (including Perpetual Licences) or other Software Licences with a term of less than 12 months, excluding Consumption Licences; and C) the last 12 month contribution of services and third party software sales.
- 2) **Subscription ACV** reflects revenue generated from Subscription Licences with a term of 12 months and Consumption Licences which exists at the end of the relevant financial period as if those contracts’ revenues were generated (and recognised) in each financial year on a straight-line basis over the relevant contract period, expressed on an annualised basis. It also includes “Nuix Advantage” which consists of renewable consulting services with a minimum term of 12 months. Subscription ACV excludes short term Software Licences (including Perpetual Licences) or other Software Licences with a term of less than 12 months, but includes Consumption Licences.
- 3) **Other ACV** reflects the last twelve-month contribution of Perpetual Licence sales, services and third-party software and short-term Software Licences, or licences with a term of less than 12 months but excluding Consumption Licences.
- 4) **Net Dollar Retention (NDR)**, expressed as a percentage, represents the ACV from the sale of Subscription Licences (excluding short-term Software Licences, or licences with a term of less than 12 months, but including Consumption Licences) from a constant set of customers (the “NDR Constant Customer Set”) across comparable periods (i.e. it excludes the impact of new customers acquired in the subsequent (i.e. more recent period), taking into account the impact of Upsell, Downsell and Churn between these two periods.
- 5) **Churn**, expressed as a percentage, reflects the lost customer ACV from Subscription Licences (excluding short-term Software Licences, or licences with a term of less than 12 months, but including Consumption Licences) in respect of a twelve-month period which are terminated or not renewed (a contract will not count towards Churn if it was renewed or recommenced within three months of the end of the given period), as a proportion of ACV from Subscription Licences (excluding short-term Software Licences, or licences with a term of less than 12 months, but including Consumption Licences) at the start of that period.
- 6) **Consumption ACV** is a sub-component of Subscription ACV and reflects the monthly contribution generated relating to gigabytes processed or under management relating to SaaS Consumption ACV and Non-SaaS Consumption ACV (including Nuix Neo) at the end of the relevant period, expressed on an annualised basis.
- 7) **Net Non-Operational Legal Costs** are Non-operational legal costs net of insurance recoveries. Referenced as “Legal fees – regulatory/litigation” in the consolidated statement of comprehensive income.

CONSTANT CURRENCY

Constant Currency has been calculated using the below methodology:

1. Constant currency rates are calculated by dividing the total 1H24 consolidated AUD revenue associated with a currency by the total 1H24 transaction currency revenue of the same currency, providing a weighted average exchange rate based on statutory revenue transactions in 1H24. This is then checked against the average daily rate provided by the RBA for appropriateness.
2. This modified rate is then applied at a transaction level across 1H25 data to ensure that all metrics (region, domain, P&L department etc.) are re-weighted appropriately.
3. Where there is a cost transaction in a currency where there have been no revenue transactions, the average RBA rate for 1H24 is used.
4. Exchange rates used for constant currency calculations:
 - > USD 1.524
 - > EUR 1.652
 - > GBP 1.918
 - > CAD 1.135

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