

2023 Preliminary Results

13 MARCH 2024

PPHC  Public Policy
Holding Company



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Presentation Team



Stewart Hall

Chief Executive Officer



Roel Smits

Chief Financial Officer



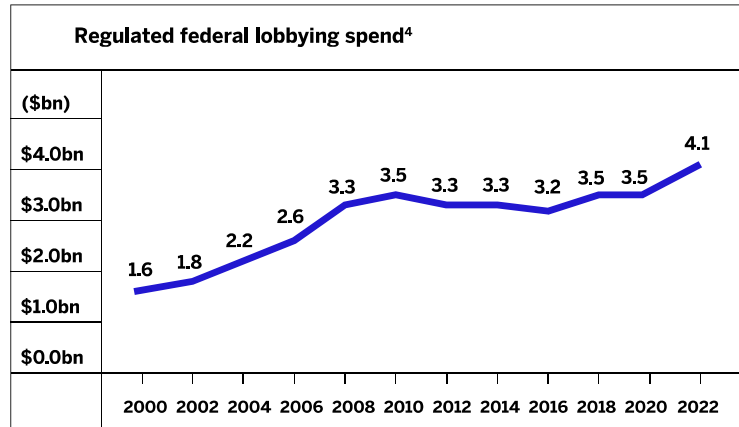
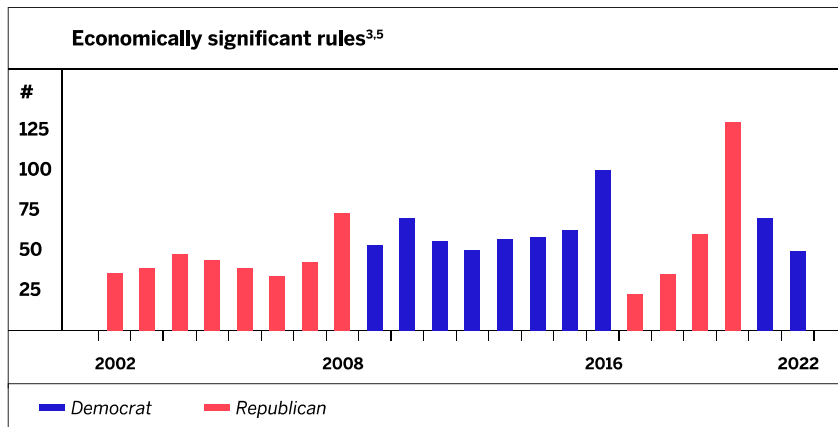
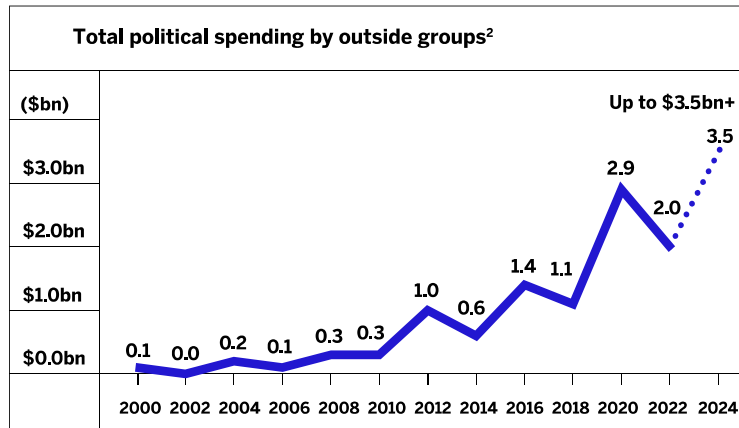
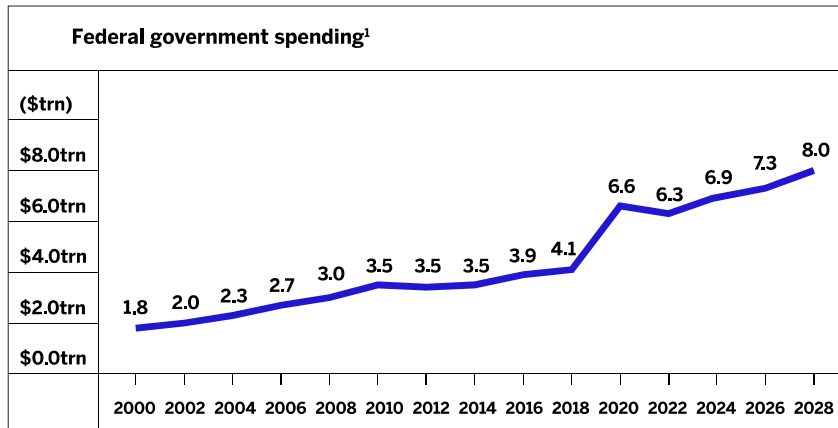
Thomas Gensemer

Chief Strategy Officer

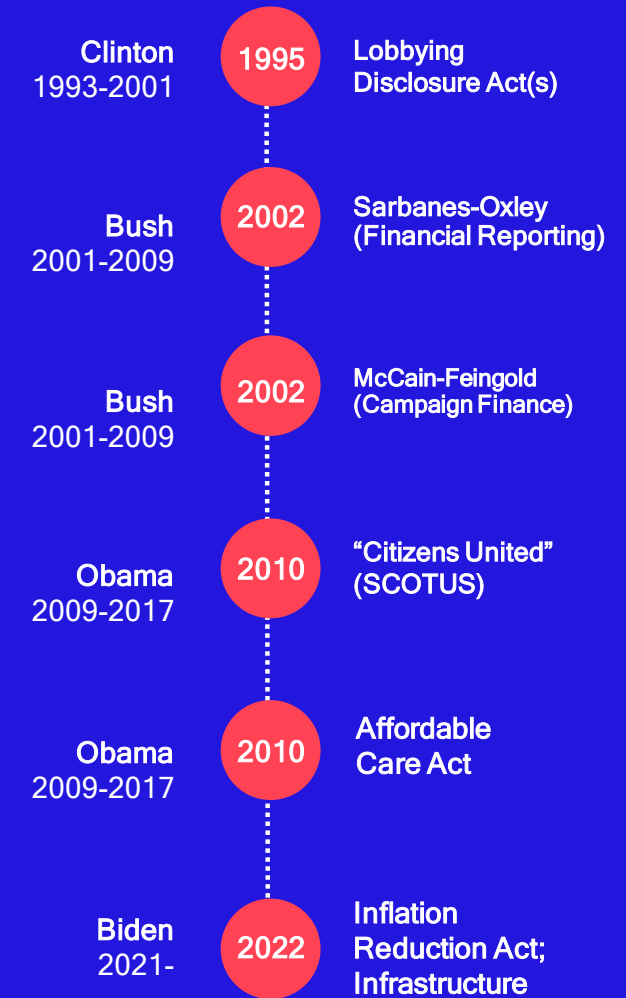
PPHC Summary



PPHC exists to help corporate and NGO clients navigate the risks and opportunities within government policy



There is longstanding, bi-partisan support for a highly regulated industry within the US



Sources: 1) Statista, 2) Open Secrets, 3) Regulatory Studies Center (Columbian College of Arts & Sciences), 4) Open Secrets.
 5: Economically significant rules are regulations issued by executive branch agencies that meet this definition in Executive Order 12866: "Have an annual effect on the economy of \$100 million or more or adversely affect in a material way the economy, a sector of the economy, productivity, competition, jobs, the environment, public health or safety, or State, local, or tribal governments or communities."

PPHC includes eight complementary, bi-partisan operating companies servicing over 1200 clients, including 44 of the Fortune 100™

GOVERNMENT RELATIONS AND POLICY ADVOCACY ("LOBBYING")

CRS
CROSSROADS STRATEGIES

ALPINE GROUP



INTEGRATED SERVICES

ftp
FORBES | TATE
PARTNERS

O'NEILL AND
ASSOCIATES

M
MULTISTATE

KP PUBLIC
AFFAIRS



PUBLIC AFFAIRS

SEVEN
LETTER

Concordant
A PPHC ADVISORY



▲ Our firms are leaders in US federal and state lobbying markets

▲ 333 full-time employees

▲ Separately-branded operating companies

▲ Conflict management via holding company model

▲ Succession planning via employee ownership is intrinsic to management philosophy

Group revenues are reported within three distinct segments (2023FY)

GOVERNMENT RELATIONS AND POLICY ADVOCACY

\$95.5m

2022 : \$78.2m

71%

of total

+22%

growth

“resilient and profitable; highly retained”

DIVERSIFIED SERVICES

\$7.2m

2022 : \$--m

5%

of total

N/A

growth

“high growth potential; recurring”

PUBLIC AFFAIRS

\$32.3m

2022 : \$30.7m

24%

of total

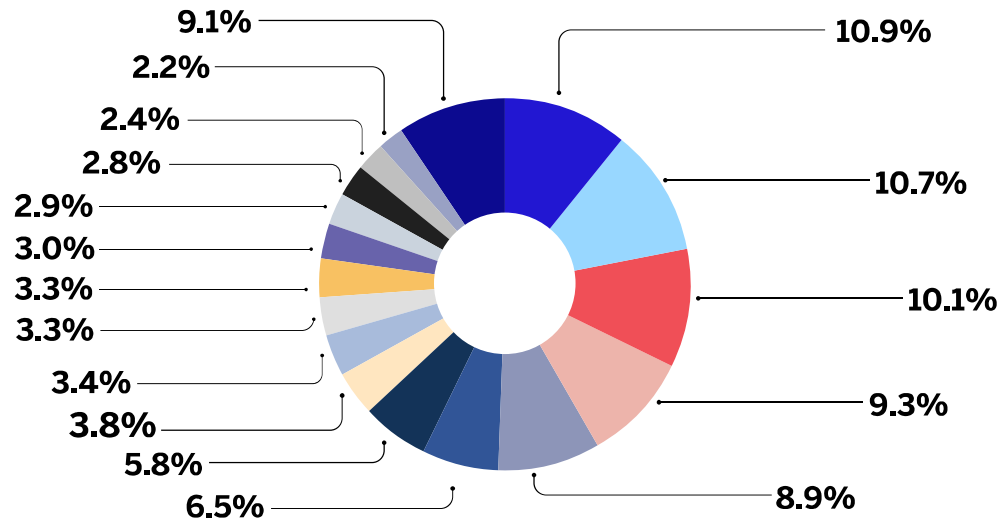
+5%

growth

“stable growth; benefits from cross-selling”

PPHC serves clients across all industries with bi-partisan policy expertise and communications strategy

Technology, healthcare, pharmaceuticals, energy and financial services lead



- Technology
- Finance
- Healthcare
- Energy
- Pharma
- Issue Advocacy
- Transportation
- Manufacturing
- Construction
- Recreation / Tourism
- Business Services
- Telecom
- Associations
- Defense
- Alcohol / Tobacco / Cannabis
- Education
- Other

A broad, growing client portfolio with low concentration and deepening share-of-wallet

Clients Served

>1,200

2022 : >850

Largest Client as % of Total

1.6%

2022 : 1.6%

Top 10 Clients

8.8%

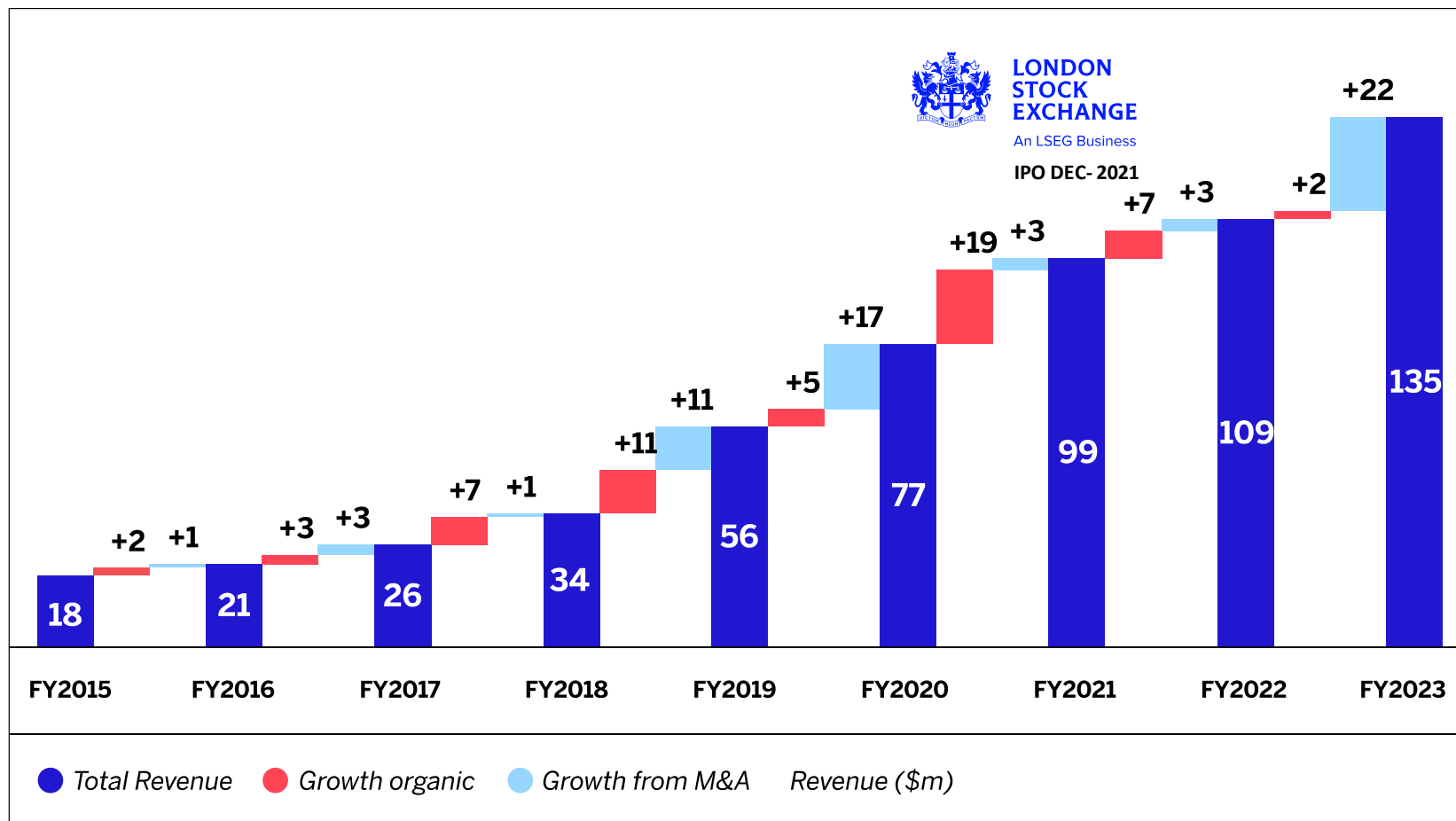
2022 : 10%

Clients ≥ \$100k p.a.

468

2022 : 384 (+23%)

Since its founding, PPHC has shown steady, robust growth, with 20% organic CAGR since 2016



Post-IPO Acquisitions

KP PUBLIC AFFAIRS

One of the Largest advocacy and public relations firms in California

DATE OF COMPLETION 1 Oct 2022

INITIAL CONSIDERATION \$11.4m

REVENUES IN YEAR PRIOR TO ACQUISITION \$12.8M

M MULTISTATE

One of the largest US-based state and local government relations specialists

DATE OF COMPLETION 1 Mar 2023

INITIAL CONSIDERATION \$22.0m

REVENUES IN YEAR PRIOR TO ACQUISITION \$10.9M

PPHC Now Outranks Other Lobbying Firms; Competes with Leading Communications Firms

GOVERNMENT RELATIONS AND POLICY ADVOCACY

Lobbying Firm	2023 Revenue (in \$m)
PPHC agencies combined (pro forma)	68.2
Brownstein Hyatt Farber Schrek	62.7
Akin Gump Strauss Hauer & Feld	54.8
Holland & Knight	47.7
BGR Government Affairs	41.8
Cornerstone Government Affairs	41.4
Invariant	39.2
Thorn Run Partners	28.0
Capitol Counsel	25.3
Forbes Tate Partners	25.0
Crossroads Strategies	24.8
Tiber Creek Group	24.2
Mehlman Consulting	24.0
Cassidy & Associates	23.3
Squire Patton Boggs	22.6
Subject Matter	20.0
Van Scoyoc Associates	19.9
Alpine Group	18.4
Ballard Partners	17.7
K&L Gates	17.6
Monument Advocacy	15.8

← \$68.2M in 2023*

PPHC firms, combined, are the largest provider of federal lobbying services in the US.

PUBLIC AFFAIRS

PPHC's peers and competition includes:



*Three leading PPHC brands combine to create the largest federal lobbying revenue earner in the U.S during 2023 (\$68.2m). LDA billings are not the entirety of PPHC revenues. Source: Bloomberg Government 2024 Top-Performing Lobbying Firms Report

2023FY Results



Continued revenue growth and profitability underpin strong cash generation and dividend payment

Revenue

\$135.0m

+24% 2022: \$108.8m

+2% (organic)

Underlying EBITDA

2023: \$35.1m

+12% 2022: \$31.2m

Underlying Net Income

2023: \$26.5m

+14% 2022 : \$23.3m

Underlying EPS

2023: \$0.2354 (basic)

+10% 2022: \$0.2145

2023: \$0.2271 (fully dltd)

+8% 2022: \$0.2113

Dividend

2023: \$0.143/share

+2% 2022: \$0.14/share

P&L results

TRACK RECORD OF PROFITABLE GROWTH

	Year ended 31 December		
P&L			
All in \$'000, unless otherwise noted	2023FY	2022FY	Change
Revenue	134,986	108,814	24.1%
EBITDA (Underlying)	35,068	31,186	12.4%
EBITDA margin (Underlying)	26.0%	28.7%	-2.7pts
Depreciation	(120)	(100)	19.3%
EBIT (Underlying)	34,948	31,086	12.4%
Interest	(941)	(17)	N/M
EBT (Underlying)	34,007	31,069	9.5%
Taxes	(7,503)	(7,798)	-3.8%
Effective tax rate	-22.1%	-25.1%	3.0pts
Net Income (Underlying)	26,505	23,271	13.9%
Net income margin (Underlying)	19.6%	21.4%	-1.8pts
EPS - Underlying (S) (basic)	0.2354	0.2145	9.7%
EPS - Underlying (S) (fully diluted)	0.2271	0.2113	7.5%
DPS	0.1430	0.1400	2.1%

Bridge from Underlying to Reported results: non-cash charges

Net Income (Underlying)	26,505	23,271	13.9%
Share-based accounting charge	(30,904)	(33,392)	
Long Term Incentive Program charges	(2,796)	(318)	
Amortization intangibles	(3,878)	(2,129)	
M&A related charges	(3,171)	(2,441)	
Net Income (Reported)	(14,244)	(15,009)	

COMMENTARY

- ▲ **P&L growing double digits** at top and bottom line.
- ▲ **Underlying EBITDA margin strong at 26%** and within traditional band 25-30%. Year-on-year reduction driven by lower level of project business, incorporation of new companies, and steady investment in growing our platform (incl public company expenses & M&A costs).
- ▲ **Interest charges increasing** due to debt-funded M&A.
- ▲ **Effective tax rate reducing to 22%** due to mix of permanent and temporary differences tax vs GAAP. Expected to remain around this level.
- ▲ **EPS increasing** solidly as well, despite increase in share count for M&A payments and LTIP issues.
- ▲ **Non-cash charges excluded from Underlying profit:**
 - ▲ Share based accounting charge: relating to at IPO; all shares made subject to vesting schedule with employment condition.
 - ▲ LTIP charges: relating to option and RSU grants to employees as part of Omnibus program.
 - ▲ M&A related charges: reflecting purchase price consideration partially being deferred, as well as made subject to employment condition.

Cash Flow

TRACK RECORD OF STRONG OPERATIONAL CASH FLOW

	Year ended 31 December		
Cash Flow			
All in \$'000, unless otherwise noted	2023FY	2022FY	Change
EBITDA (Underlying)	35,068	31,186	12.4%
Interest	(941)	(17)	
Taxes	(7,503)	(7,798)	
Changes in Working Capital	(5,022)	(2,694)	
Operational Cash flow	21,603	20,678	4.5%
Capex	(233)		
Acquisitions - Earnout Payments (cash)	(3,643)		
Acquisitions - Completion Payments (cash)	(17,600)	(11,912)	
Note receivable to related parties	(1,750)		
Investment Cash flow	(23,226)	(11,912)	95.0%
Change in Debt balance	11,056	(26)	
Debt issuance costs	(451)		
Dividend payment	(15,843)	(5,572)	
Financing Cash Flow	(5,238)	(5,598)	-6.4%
Cash generated	(6,861)	3,167	-316.7%
Balances end of period			
Cash balance	14,341	21,202	-32.4%
Debt balance	(10,941)	(211)	N/M
Net cash balance	3,400	20,992	-83.8%

COMMENTARY

Operational Cash Flow increasing by 4.5% to \$21.6m In line with EBITDA improvement, albeit dampened by (1) higher-than-normal working capital investment due to inclusion of MultiState high billings (pass through charges not reflected in P&L) and (2) timing of tax payments.

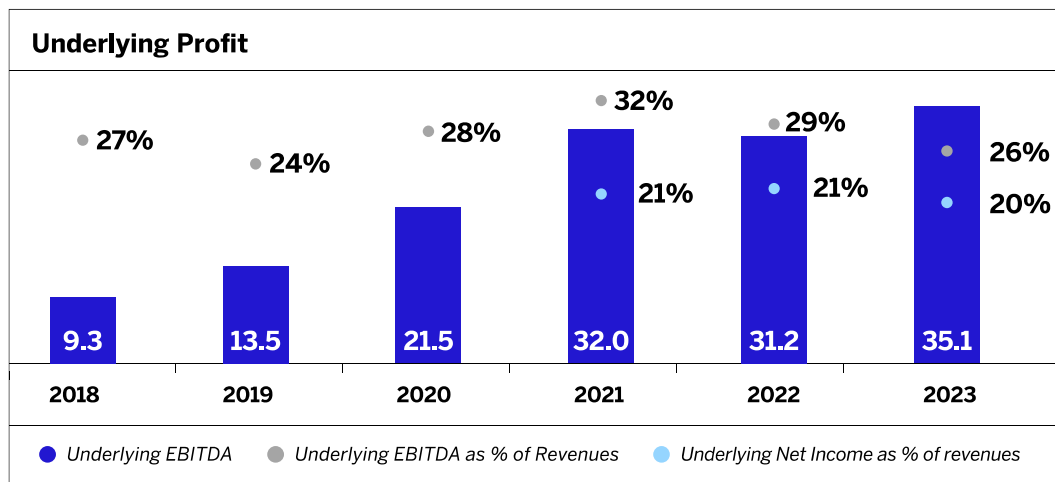
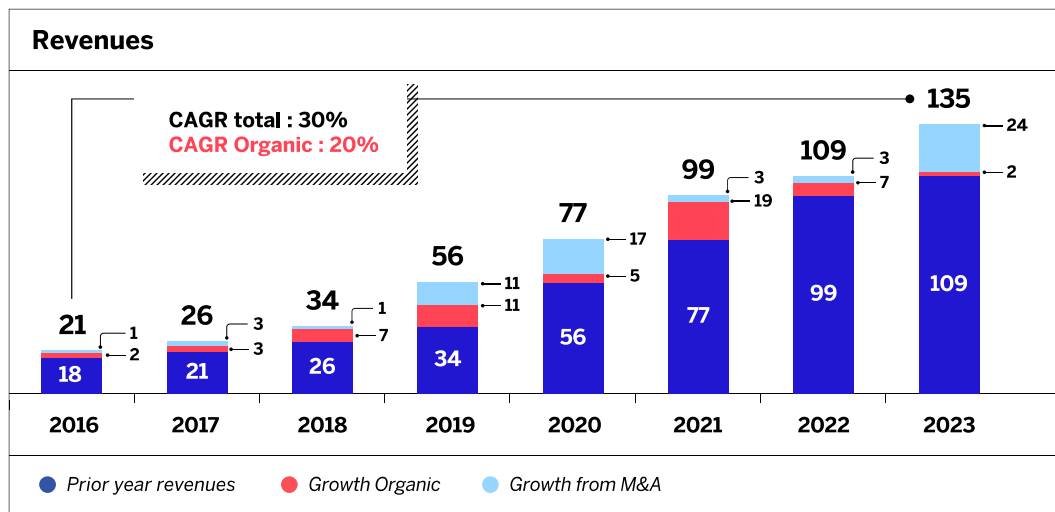
Investment Cash Flow reflecting acquisition payments for completion MultiState and earnout KP Public Affairs. Also, provided \$1.75m loan to key execs Alpine Group for facilitating reorganization predecessor company and buy-out of estate of partner who passed away in 2023.

Financing Cash Flow reflecting attraction and subsequent servicing of \$17m debt facility from Bank of America in March 2023, with year-end balance \$10.9m. Also reflects \$15.8m dividend payment, resulting from PPHC's progressive dividend policy (DPS increasing conservatively at 2%, while payout ratio decreasing from ~65% to ~61%)

Net cash position at December 2023 was \$3.4M, being balance of \$14.3M cash and \$10.9m debt

Continuing a strong track record of growth

TRACK RECORD



COMMENTARY

- ▲ **Historical growth:** PPHC has typically delivered growth and excellent profitability throughout political and economic cycles.

Government relations business provides for steady profitable growth, while Public Affairs creates scope for incremental growth, albeit more volatile and at lower profit.

Margins fluctuating within a band based on level of project business, incorporation of new companies, and steady investment in growing our platform (incl public company expenses and M&A costs)

- ▲ **Our objective:** PPHC aims to continue growing through a mix of organic growth and (disciplined) M&A , while servicing our clients better through augmenting the group's capabilities.
- ▲ **Medium Term outlook reiterated:**
 - ▲ Revenues organically growing 5 to 10% each year
 - ▲ Incremental growth from future M&A
 - ▲ EBITDA margin between 25% and 30%

Growth Strategy



Organic Growth Strategy - Highlights

ONGOING INVESTMENTS IN OUR BRANDS AND IN HOLDCO PLATFORM TO SUPPORT ORGANIC GROWTH

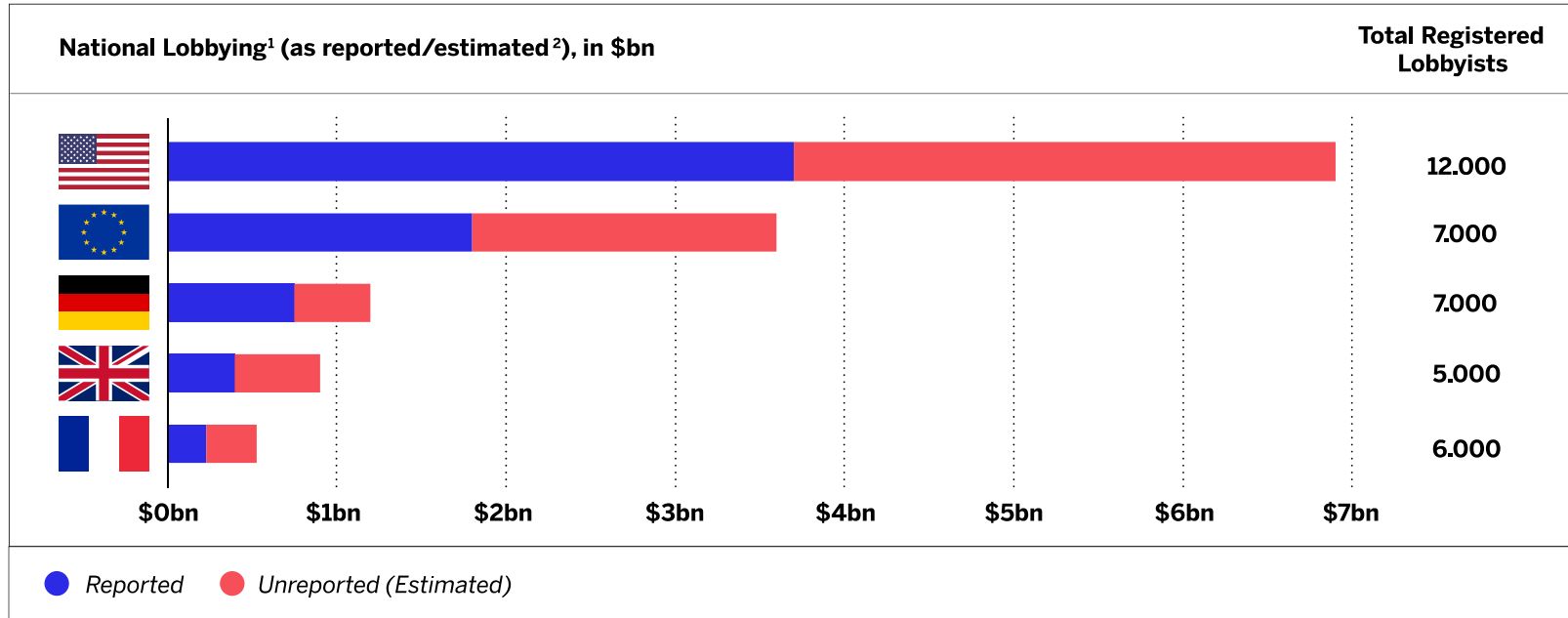
Concordant Advisory launched 1 November '23 to support the broader **Strategic Communications** needs of Group clients, new and existing. This offering is designed to build client-specific solutions from the breadth of Group experts and specialised capabilities.

NOTABLE NEW HIRES IN GROWTH AREAS, INCLUDING:

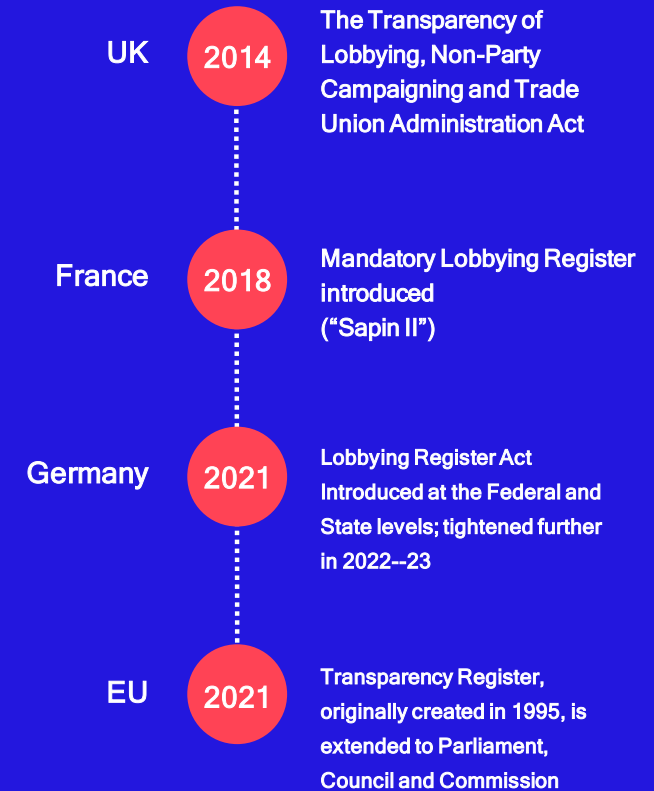
- ▲ Financial services
- ▲ Renewable/transition energy
- ▲ Pharmaceuticals Crisis
- ▲ Technology and AI
- ▲ ESG
- ▲ Crisis communications
- ▲ Media relations
- ▲ Research / Analytics



Our short-term goal is to establish a Group presence in key global markets to unlock referral nexus into global corporate budgets



While still less regulated than in the US, UK & EU governments have increased lobbying transparency requirements over the last decade



- 2020 data where 2021, 22 not available
- "Unreported" (aka 'shadow lobbying' includes all fees paid and media invested to impact legislation, directly or indirectly. Not all reporting regimes count equally, so industry estimates vary)
- Given limited UK Lobbying Registry data, spending and lobbying headcount is estimated from Registry meeting and organisation count data, benchmarked against other geographies
- Converted from (1.03 EU) and (.89 GBP) November 11, 2022
- Sources: OpenSecrets.org, EU and National Transparency Registries of UK, Germany and France, The Economist, Politico, Bloomberg Media (BGOV), LinkedIn Data, Expert Interviews, original PPHC analysis

Active M&A Pipeline, expanding geographies and capabilities

AMPLE SCOPE FOR GROWTH THROUGH M&A

- ▲ Multiple M&A opportunities under consideration/review, which would expand geographies and capabilities
- ▲ Typically, earnout transactions, whereby future payments are conditioned upon growth post-acquisition
- ▲ Funded through mix of cash and shares
- ▲ Understanding with bank allows for increasing debt ratio to ~1.5x EBITDA

CRITERIA FOR M&A OPPORTUNITIES

- ▲ Best in class ethical and compliance standards
- ▲ Market share and diversification benefits
- ▲ Premium financial profiles and maintenance of group-wide margin targets
- ▲ Long-term revenue synergy potential and opportunities
- ▲ Accretive to EPS
- ▲ For UK/EMEA expansion: Sufficient level of scale to serve as "hub" of international growth

Geography



Key US State and International Capitals



Issue Specialisation



The Right Industry Specialisation for Today's Economy



Conclusion



High government spending + risky political climate = strong, global demand

- ▲ Strategic communications with financial, healthcare and tech specialisation(s) among the fastest growing sectors, each with unique demands for policy and regulatory expertise;
- ▲ PR holding companies and other multi-disciplinary agency groups have struggled and have lost ground to specialty firms for C-suite services, crisis, and other non-consumer projects;
- ▲ Significant investment by private equity has entered the market in force (KKR, TPG, etc.).

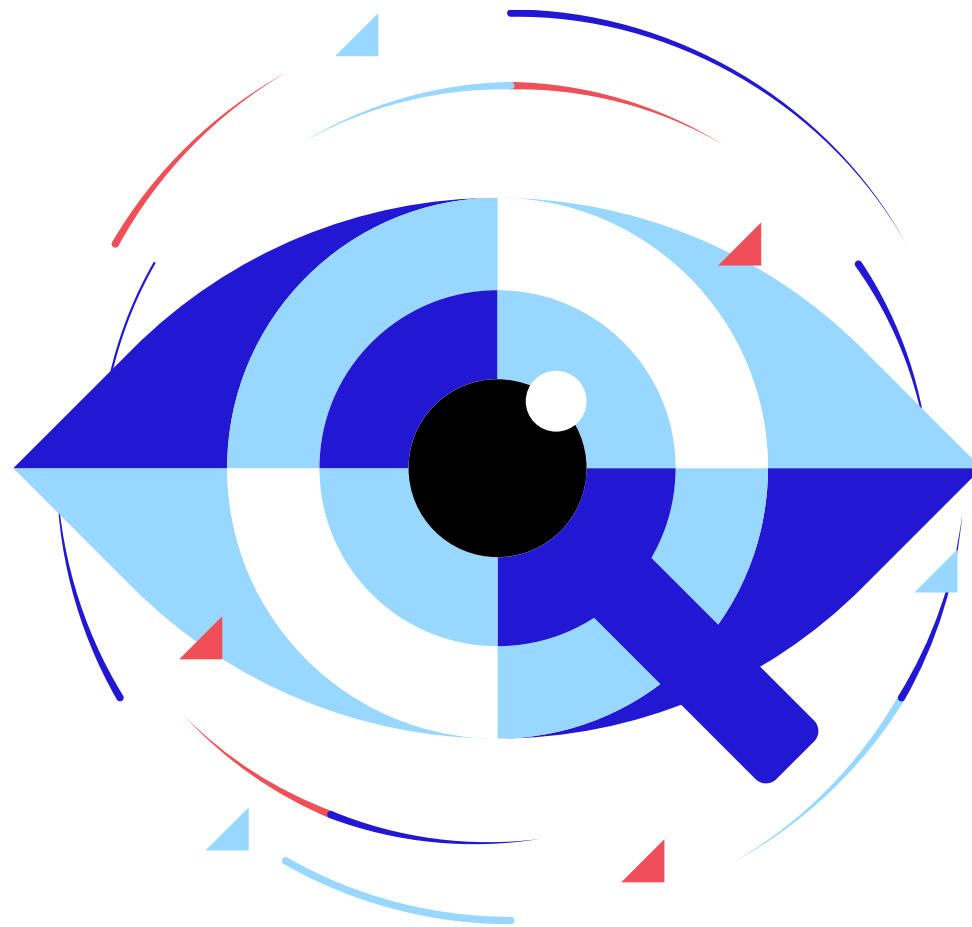


Sources: PwC Annual Survey 2023; Politico EU, April 2023

Outlook

The Board retains its confidence in the ongoing prospects for the Group and reiterates its medium-term guidance to achieve:

- ▲ Revenues organically growing 5 to 10% each year
- ▲ Incremental growth from future M&A
- ▲ EBITDA margin between 25% and 30%



Summary: Why Invest in Public Policy Holding Company?

STRONG, PROVEN BUSINESS

- ▲ Large and growing industry with low correlation with economic cycle
- ▲ High level of regulation and transparency
- ▲ Blue-chip client base of 1200+ companies, often tapping from CEO budgets
- ▲ Uniquely low client concentration
- ▲ High client retention (85%+)
- ▲ Experienced management team
- ▲ High degree of employee ownership across the Group

ATTRACTIVE FINANCIAL PROFILE

- ▲ Premium profit margins
- ▲ Low capex; low debtor days
- ▲ Typical retainers billed in advance; very little hourly/project billing
- ▲ Therefore, strong free cash flow to support dividends and continued M&A

ATTRACTIVE DIVIDEND

- ▲ History of payout ratio of underlying net profit >60%
- ▲ Semi-annual dividend payments (1/3, 2/3)
- ▲ Alignment of internal and external shareholders

STRONG GROWTH PROSPECTS

- ▲ Market continues to grow
- ▲ Holding company model designed to support organic and inorganic growth
- ▲ Opportunity to expand and acquire in US and internationally
- ▲ M&A strategy being executed and led by industry experts
- ▲ Public company model unique in the space
- ▲ Opportunity to offer cash and shares attractive for M&A

Appendix



How does the PPHC Platform add value?

- ▲ PPHC maintains **separately branded** and managed operating companies
- ▲ PPHC offers **conflict mitigation**, access to **growth capital**, operational efficiencies and cross referral opportunities
- ▲ PPHC supports each Member Company through **back-office services** such as Finance, HR, Benefits & Payroll, Legal, M&A, and Client Development support
- ▲ Group companies benefit - in both directions - from PPHC's successful **referral reward programme**
- ▲ **Public company status** allows for broad & dynamic share-ownership and access to growth capital and assures clients of Group companies

PPHC's Platform for Operations



Acquisitions since IPO

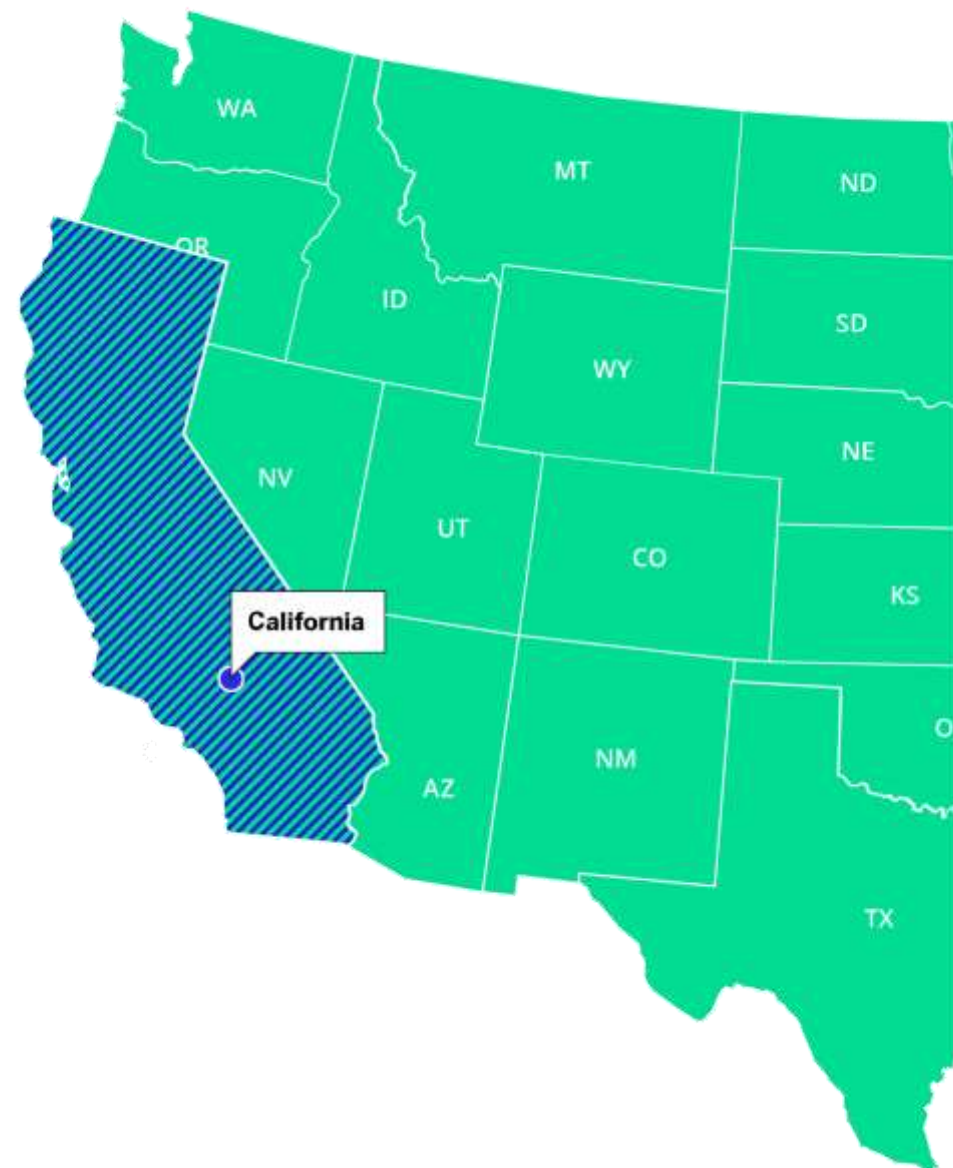


- ▲ **Joined October 2022**
- ▲ Founded in 1996, KP has decades of experience and proven success in the advocacy and public affairs business.
- ▲ KP is consistently ranked as one of California's top lobbying firms.
- ▲ Current clients include many Fortune 500 corporations, tech startups, local governments, and trade associations.
- ▲ 6 shareholding principals



M U L T I S T A T E

- ▲ **Joined March 2023**
- ▲ Founded in 1994, MultiState offers State-level advocacy and public relations. In addition, it has grown a very substantial research and compliance offering
- ▲ Servicing over 300 corporate clients, including several Fortune 500 constituents, as well as associations
- ▲ 13 shareholding principals



From Hire to Hearing in One Day: Launching a 26-State Lobbying Program from Scratch for a National Trade Association

Challenge

When legislation detrimental to the industry was introduced in the California state legislature, a national trade association with no state government affairs footprint needed to quickly launch a state program. While they had an impressive and expansive federal affairs team, the trade association had no insight on how to begin at the state level. Acting quickly was vital – the bill was poised to move quickly through the California Legislature and carried with it the potential to spread to other states.

Solution

- ▲ MultiState secured representation in a single state within 24-hours, expanding to 25 additional states over the next two years.
- ▲ In each state, MultiState brought the association's membership together to draft a legislative framework and work with the on-the-ground lobbying team to advance it.

Results

- ▲ Almost 20 states have moved policy in a favorable way.
- ▲ By partnering with Multistate, the trade group was able to grow from a zero-state footprint to a campaign that has successfully engaged in more than half of the country in just three years – and plans to launch a 50-state program in the near future with MultiState at its side.



Automating Lobbying Compliance Saves Fortune 500 Technology Company Thousands of Hours



Challenge

A Fortune 500 technology company was spending weeks scrambling to gather information from dozens of employees to compile their federal lobbying reports. The compliance coordinator responsible for overseeing the internal reporting and filing devoted 100 percent of their work time to lobbying compliance at the end of each filing period (45 days), leaving zero time to work on other tasks. When the federal government reduced the deadline to file to 20 days, they knew they needed a better solution.

Solution

- ▲ MultiState's compliance team built custom forms for the client to be deployed through MultiState's online compliance system.
- ▲ With MultiState's compliance team automating and monitoring the process, the client's compliance coordinator simply interacted with MultiState rather than spending thousands of hours chasing employees for data.

Results

- ▲ MultiState's customized solution saved the client time and money and gave them peace of mind.
- ▲ The new process also helped the company improve efficiency in their tax reporting and filing.
- ▲ MultiState's client asked to expand the service to all of their state lobbying compliance work.

Saving American Solar Jobs

Challenge

A Department of Commerce (DOC) investigation into solar panel imports from Southeast Asia posed a threat to the US solar industry. Solar projects planned for 2022 were put on hold while US solar companies awaited parts from abroad to complete their projects. Seven Letter was tasked with creating a campaign aimed at preventing the application of solar tariffs by the DOC.

Solution

- ▲ Seven Letter performed opinion research and opposition research to identify the most effective arguments and persuadable groups.
- ▲ Seven Letter created a website with a “Take Action Form”.
- ▲ Digital ads, broadcast TV, newsletter and print ads, and influencer activation was utilised to reach the targeted audience and inspire them to take action.

Results

- ▲ Opinion and opposition research was used in messaging across coalition.
- ▲ 23,000 calls and emails were made to the Commerce Department and the White House regarding the issue of solar tariffs.
- ▲ Ads generated 61 million impressions and 83,000 clicks to website.
- ▲ Video ads were viewed nearly 11 million times.
- ▲ President Biden announced a 2-year moratorium on solar tariffs and invoked the Defense Production Act to advance domestic solar manufacturing.



Saving America's Family Enterprises by Putting a Stop to the Double-Death Tax

Challenge

Seven Letter was tasked with creating a campaign to persuade the public to oppose the STEP Tax

Solution

- ▲ Identify the segment of the population that is persuadable through polling
 - ▲ Specifically, the segment of the population that is rational persuadable, meaning that they are persuaded by informative arguments.
- ▲ Create an ad that targets the persuadable segment of the population using test audiences to gauge reactions and effectiveness

Results

- ▲ Drove engagement amongst the targeted audience identified in the research phase
- ▲ House Ways & Means Committee's tax plan ended up not include a proposal to tax unrealised capital gains upon the death of their owner, thereby making this campaign a success for this Congress



Educating the Public on the Importance of Physician-Led Care



Challenge

In 2023, a California state agency sought to create new regulations around Earned Wage Access (EWA) that was unfavorable to Forbes Tate's client and the overall industry.

Solution

- ▲ Forbes Tate executed a multi-channel public affairs campaign to shape the proposed rulemaking.
- ▲ Utilizing both its government affairs and public affairs practices, Forbes Tate combined on-the-ground lobbying with a dynamic digital awareness and activism program.

Results

- ▲ The campaign generated more than 60,000 comments to California Governor Gavin Newsom and the state agency proposing new EWA rules
- ▲ Over 4.2 million digital advertising impressions
- ▲ Over 3.8 million views of a user testimonial video produce by Forbes Tate
- ▲ The state agency issued a revised rule proposal more favorable towards Forbes Tate's client and the industry as a whole

Educating the Public on the Importance of Physician-Led Care



Challenge

After years of scope of practice expansion by nurses and mid-level healthcare providers in California, the California Society of Anesthesiologists wanted to increase awareness about the importance of physician led care in order to protect the specialty from scope attacks and to help with future engagement on contracting and reimbursement issues. They needed to better educate key audiences about the important role of physician anesthesiologists in patient care as well as their value in the overall delivery of efficient, cost-effective healthcare.

Solution

- ▲ KP Public Affairs developed a digital media campaign to spread the message about the importance of physician led anesthesia care. This included creative graphics, videos, web content, and member outreach materials.
- ▲ KP developed materials to support legislative education and engagement on scope of practice and title protection acts.
- ▲ KP's program was deployed to showcase CSA leadership amongst medical societies and to reinforce the value of membership and engagement with the association.

Results

- ▲ The campaign resulted in more than 14.5 million impressions, over 408,000 video views, over 60,000 clicks to the website for more information and a dramatic increase in social media followers.
- ▲ By delivering impactful messages about the importance of physician-led care, this campaign not only promoted and defended the specialty, but it also helped lay the groundwork for CSA to engage proactively or reactively on legislative and regulatory issues that are ahead.

Guiding a Housing Non-Profit through the Legislative Process



Challenge

Navigate Affordable House Partners, a client of Crossroads Strategies, is a mission-driven non-profit contracted to facilitate the Section 8 program in multiple states. In 2022, the U.S. Department of Housing and Urban Development (HUD) issued a draft solicitation that, if finalized, would have effectively dismantled the system by which states oversee the Section 8 housing voucher program, eliminating the role that Navigate plays. The efficacy of the Section 8 program in many states is predicated on the experience of organizations like Navigate, but HUD's draft solicitation would have excluded Navigate from administering contracts in favor of a regional model that would disregard the unique needs of each state.

Solution

- ▲ Crossroads Strategies organized Navigate's partner organizations in a coalition effort to educate and engage lawmakers on the potential impact of HUD's proposed rulemaking.
- ▲ CRS recruited dozens of members of congress to send letters to HUD requesting that the department withdraw its draft solicitation.
- ▲ CRS drafted language for inclusion in the FY2023 omnibus spending package that barred HUD from using any funding to implement the proposed rulemaking. They built support for this language among appropriators and the signers of the abovementioned letters, creating strong, bi-partisan support in the House and Senate for congressional action on the matter.

Results

- ▲ The final FY2023 omnibus package included language that barred HUD from implementing the draft solicitation or any solicitation of substantial equivalency.
- ▲ As a result, Navigate continues its work towards furthering its mission of investing in communities, providing quality housing options, and offering services to benefit the entire housing industry.

