



GAMING TRENDS

GAMING AS A PLATFORM

Platforms such as Twitch and Steam now operate as social media platforms. These platforms can facilitate interactive experiences such as fashion shows, music, concerts and movie showings, providing numerous opportunities for sponsors and promoters.

5G PENETRATION

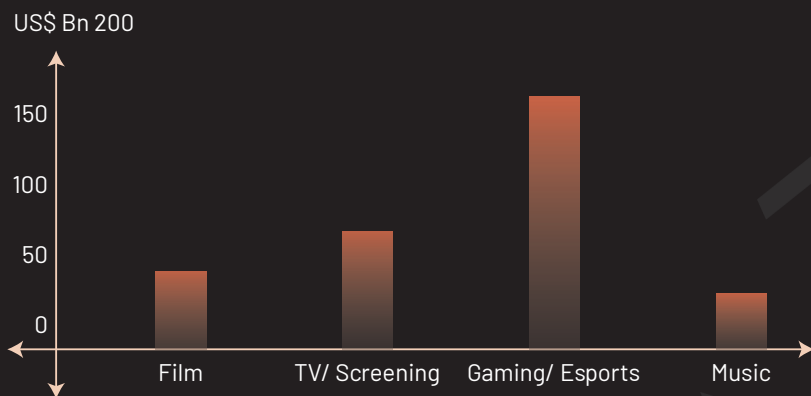
5G connectivity continues to roll out globally and by the end of 2021 it is forecast that 16% (more than 700 million) of all active smartphones will be 5G ready by the end of 2021. By 2023 this is expected to reach 2.1 billion. Enabling gaming anytime, anywhere.

KEY STATS

- 2020 global gaming revenues were estimated at US\$159.3 billion. By 2023 this figure is expected to reach US\$200 billion.
- In 2020 there was 2.7 billion gamers worldwide. This is expected to grow to 3 billion by 2023.

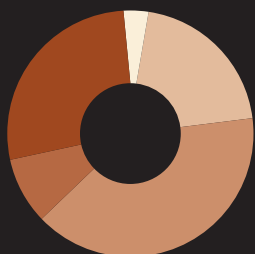
Source: Newzoo's Global Games Market Report, 2020

2020 INDUSTRY REVENUE



Source: Motion Pictures Association, Billboard

SEGMENT BREAKDOWN



Browser pc Games \$3.0 Bn -13.4% YoY	Smartphone Games \$63.6 Bn +15.8% YoY	Console Games \$45.2 Bn +6.8% YoY
Downloaded/ Boxed Games PC Games \$33.9 Bn +6.7% YoY	Tablet Games \$13.7 Bn +2.7% YoY	

Source: Newzoo's Global Games Market Report, 2020

ESPORTS TRENDS

TRADITIONAL SPORTS WILL INCREASINGLY LOOK TO ESPORTS

With pro sporting events being opened up behind closed doors or with limited crowds, sports organisations around the world – from the LA Lakers to Manchester United spent 2020 increasing their Esports presence.

ESPORTS AUDIENCE TO GROW

Esports is entering popular culture, in large part due to the social component of live streaming. In 2023 total viewership is expected to reach 650 million people. With younger audiences increasingly disengaging from traditional TV, marketers and promoters will increasingly see Esports and gaming as a vehicle to engage with younger demographics.

SPONSORSHIP GROWTH

By 2020 an estimated US\$1 Billion will be spent on Esports media rights and sponsorships.

KEY STATS

- Global Esports revenue grew US\$1.2 billion in 2020, a year on year growth rate of +15.7%.
- The global Esports audience grew to 495 Million in 2020, a year on year growth rate of +11.7%.

Source: Newzoo's Global Games Market Report, 2020

2019: SPORTS VS. ESPORTS PRIZE POOL

Rank	Name	Winnings	Game	Event
01	Rory McIlroy	\$15,000,000	Gold	FedEx Cup
02	Hossein Ensan	\$10,000,000	Poker	World Series of Poker
03	Rafael Nadal	\$3,850,000	Tennis	US Open
04	Topias "Topson" Taavitsainen	\$3,100,000	Dota 2	The International
05	Sébastien "Ceb" Debs	\$3,100,000	Dota 2	The International
06	Johan "N0tail" Sundstein	\$3,100,000	Dota 2	The International
07	Anathan "Ana" Pham	\$3,100,000	Dota 2	The International
08	Jesse "JerAx" Vainikka	\$3,100,000	Dota 2	The International
09	Kyle "Bugha" Giersdorf	\$3,100,000	Fortnite	Fortnite World Cup
10	Novak Djokovic	\$3,100,000	Tennis	Wimbledon
11	Simon Pagenaud	\$2,600,000	Racing	Indy 500
12	Tiger Woods	\$2,000,000	Gold	The Masters
13	Denny Hamlin	\$1,500,000	Racing	Daytona 500
14	Michael Van Gerwen	\$600,000	Darts	PDC Championship
15	Egan Bernal	\$550,000	Cycling	Tour De France

*Does not include NBA, NFL, MLB, NHL, MLS

Source: Gamingstreet.com

CALL US: +61 2 9231 8630 | **ADDRESS:** Chifley Tower, Level 29, 2 Chifley Sq, Sydney NSW 2000
EMAIL: operations@paccapital.com.au | **WEB:** www.paccapital.com.au



P.A.C. Capital Global Esports Fund

The structural transition of gaming into both a social and competitive activity is creating numerous opportunities for investors within the Gaming and Esports space. Currently on market there are numerous passive Esports investment options. The P.A.C. Capital Esports fund is an Australian first, and one of only a few globally, offering active global equity exposure to the gaming and Esports thematic. The fund is a high conviction, concentrated portfolio of the most outstanding global gaming and Esports companies. The fund leverages sector opportunities by investing in the best opportunities (long and short) in gaming and Esports companies.

DISCLAIMER

P.A.C. Capital Pty Ltd is a Corporate Authorised Representative (CAR) of the Boutique Capital Pty Ltd AFSL 508011, CAR Number 001266321(BCPL).

This document contains general advice only and has been prepared by P.A.C. Capital Pty Ltd (PAC Capital) for individuals identified as wholesale investors for the purposes of providing a financial product or financial service, under Section 761G or Section 761GA of the Corporations Act 2001 (Cth).

The information herein is presented in summary form and is therefore, subject to qualification and further explanation. The information in this document is not intended to be relied upon as advice to investors or potential investors and has been prepared without taking into account personal investment objectives, financial circumstances or particular needs. Recipients of this document are advised to consult their own professional advisers about legal, tax, financial or other matters relevant to the suitability of this investment service.

The investment summarised in this document is subject to known and unknown risks, some of which are beyond the control of PAC Capital and their directors, employees, advisers or agents. PAC Capital does not guarantee any particular rate of return or the performance of the Fund, nor does PAC Capital and its directors personally guarantee the repayment of capital or any particular tax treatment. Past performance does not guarantee future performance. We describe what steps we take to mitigate risk (where possible) in the Fund's Information Memorandum. It is important to note that despite taking such steps, we cannot mitigate risk completely.

This document is informational purposes only and is not a solicitation for units in the Fund. Application for units in the Fund can only be made via the application form, in conjunction with the Fund's Information Memorandum, which should be read thoroughly. All information provided herein is qualified in its entirety by reference to such documentation.

CALL US: +61 2 9231 8630 | **ADDRESS:** Chifley Tower, Level 29, 2 Chifley Sq, Sydney NSW 2000
EMAIL: operations@paccapital.com.au | **WEB:** www.paccapital.com.au