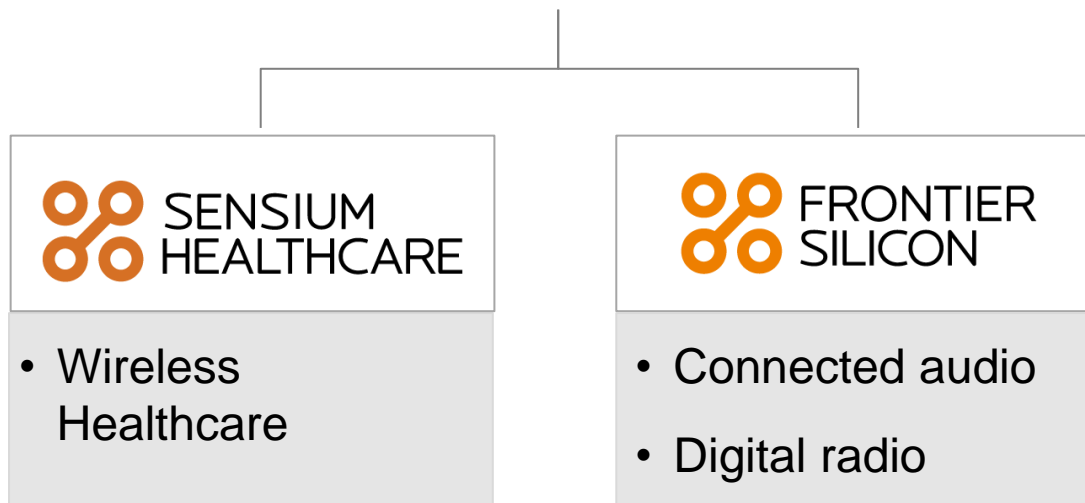


Annual General Meeting

Anthony Sethill, CEO

28 May, 2015

Wireless technology - medical devices and digital audio



- Sensium Healthcare: pioneer in patient monitoring
- Frontier Silicon
 - innovator in connected audio
 - #1 in chips / modules for digital radio
- Full year Group revenues: £26.2m (up 19.5%)

2015 objectives – by business line

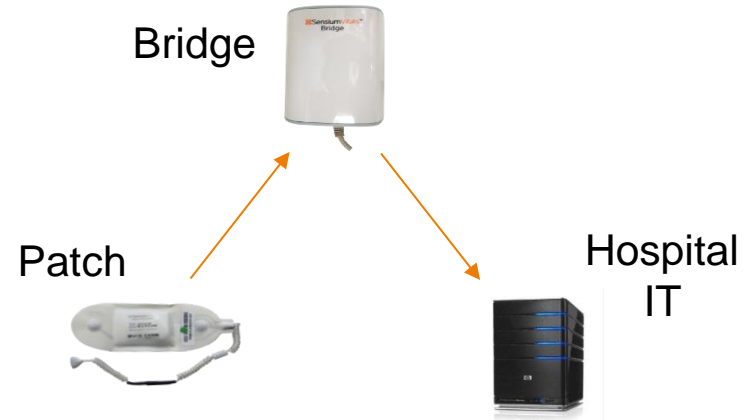
	Objectives for 2015/16
Healthcare	<ul style="list-style-type: none">• Increase number of hospitals trialling the system• Secure first conversions
Connected Audio	<ul style="list-style-type: none">• Maximise sales potential of existing solutions• Secure partnerships with market makers for next generation solutions• Next generation solution to be sampling to customers in H2 15
Digital Radio	<ul style="list-style-type: none">• Retain market share (and continue to support market growth)• Switch leading customers to next generation solutions

SensiumVitals system enhancements completed in March 2015

- **System stability**

- complex RF environments causing interference to bridge (bug fixes required)
- patches now connect to system more quickly and reliably

Connecting patches to system



- **More intuitive user interface**

- vital signs readings and trend data
- alerts / notifications for clinicians

SensiumVitals screenshot

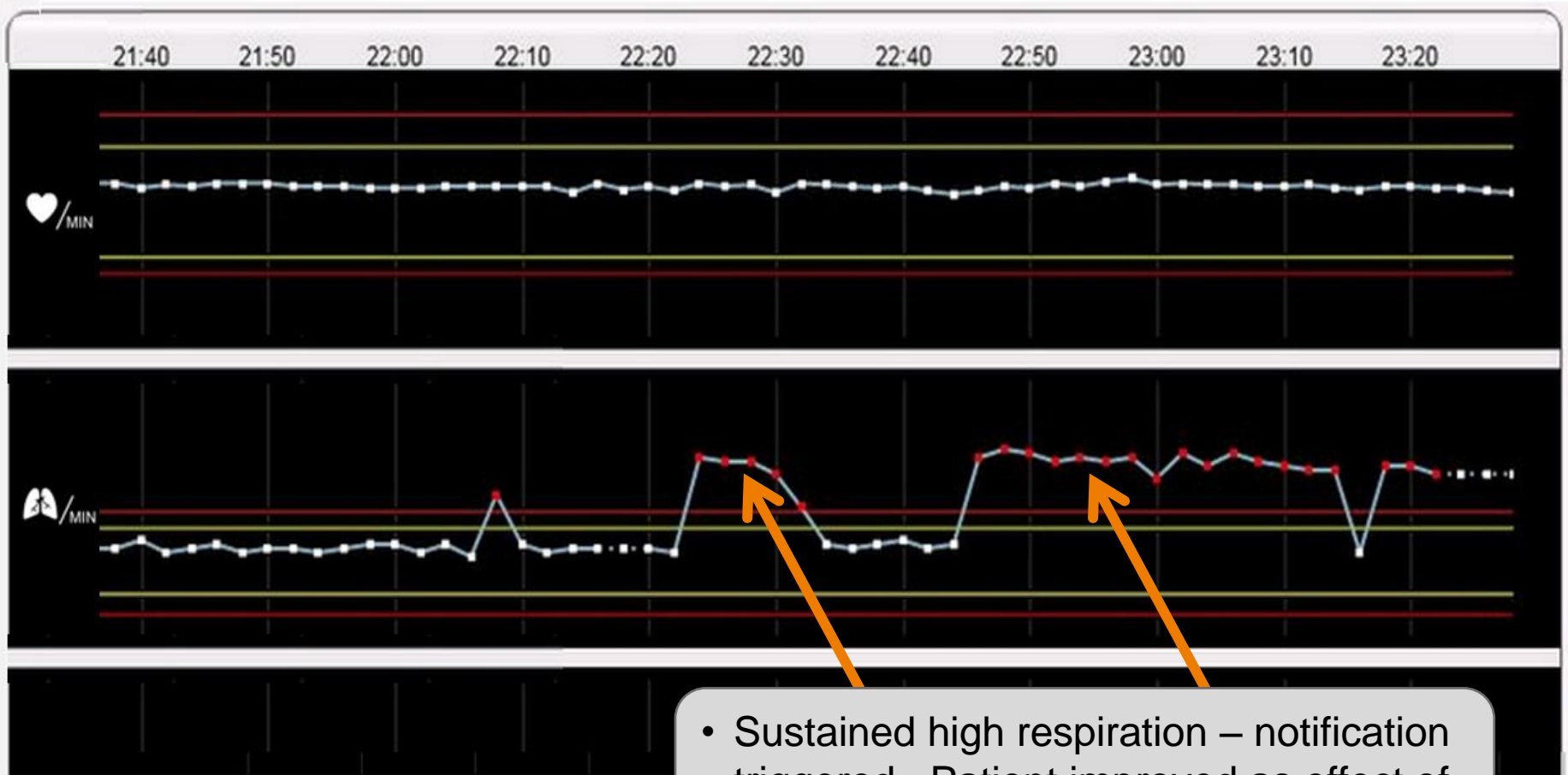
Group: All [dropdown] [refresh] [filter] [help] [grid]

Actions [dropdown]

	Patch	Room-Bed	Patient by Name	Heart Rate / MIN	SpO2 / MIN	Temp °C
		EP36 - 01	AAA, Damitha	100	11	36.8
		EP35 - 01	BBB, Melanie	88	20	37.1

SensiumVitals Case study

A 77 year old female post-operative patient



- Sustained high respiration – notification triggered. Patient improved as effect of anaesthetic wore off.

SensiumVitals® has been trialled in 20 hospitals

**Pipeline: 300+
(200+)¹**

- Qualified leads
 - confirmed interest

**Trials: 20
(16)**

- Paid for deployments where hospital tests the system

• A further 19 trials agreed – expected to start in next three months

**Conversions
(0)**

- Hospitals converting to long term contracts

• In US, an FDA-approved testing laboratory is a first non-hospital “conversion”

(1) Figures in brackets refer to status as of 31 March 2015

Connected audio performing strongly this year

Recent connected audio design wins



PHILIPS



Bowers & Wilkins

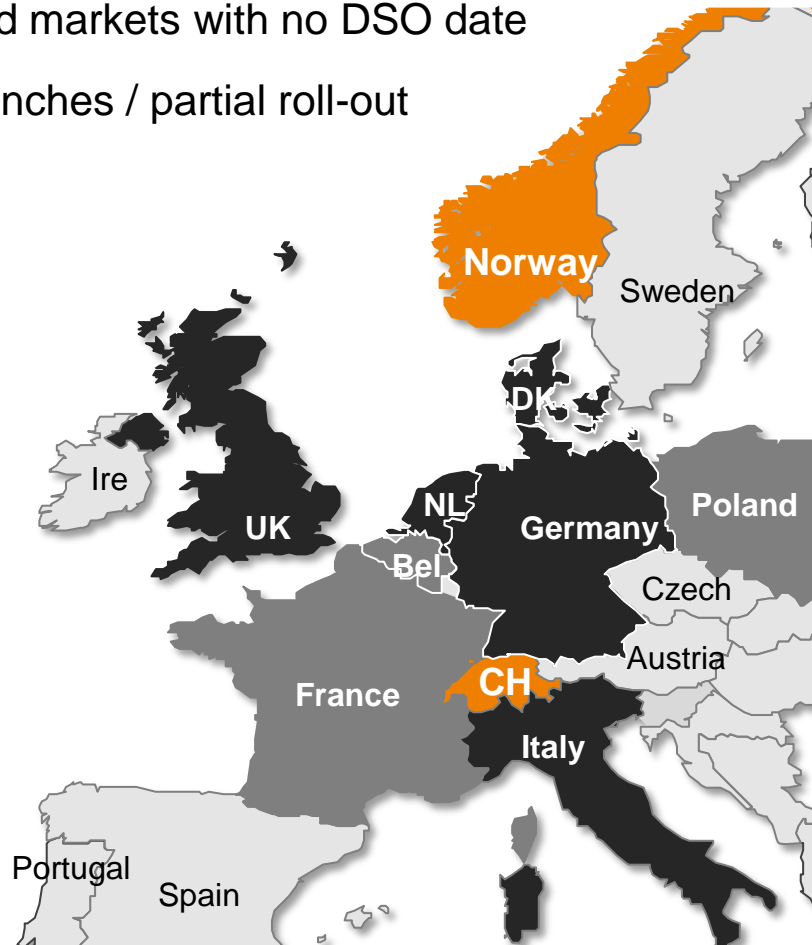
- YTD unit sales up 60% year on year
- In line with market forecasts (expected to grow over 50% in 2015)
- Strong customer demand for Frontier's Spotify / multi-room solutions
 - designs from Philips and Bowers & Wilkins – with ten others now using Frontier's multi-room app
- Next generation solution sampling to customers in H2 2015

Digital radio making strong progress in Europe

 Established markets with Digital Switchover (DSO) date

 Established markets with no DSO date

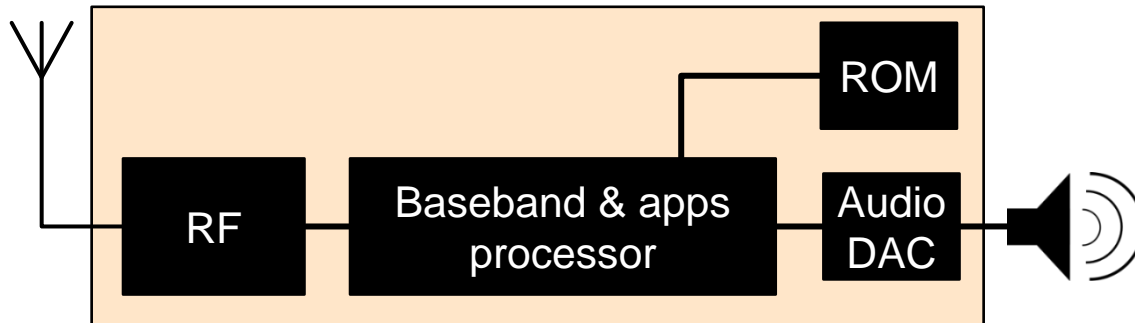
 Recent launches / partial roll-out



- Seven established markets – global volumes growing at 20%
- First DSO announcements:
 - Norway (2017)
 - Switzerland (2020-24)
- German market volumes growing strongly: Q1 up 75% year on year
- France, Poland and Belgium – emerging markets (more to follow)

New digital radio solution now shipping in volumes

Chorus 4 – “four chips in one”



- 50% power saving
- enhanced performance and functionality
- lower cost / higher margins

- Frontier maintaining market share at 80% of consumer digital radio
- Chorus 4: cornerstone of Frontier digital radio business
 - for next five years
 - 20m+ units forecast
- May 15 – volumes start to ramp / margins improved
- Sony – first brand to ship

Summary – on track to deliver against objectives

- Strategic goals
 - Establish SensiumVitals® as global leader in vital signs monitoring
 - Connected Audio: establish Frontier as a leading turnkey solutions provider
 - Digital Radio: maximise profit
- Financial objectives
 - Sustained positive cash-flows in H1 2016
 - Significant revenue growth over next three years

Thank You

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