

AGEM Index

Association of Gaming Equipment Manufacturers

September 2013

In September 2013, the AGEM Index reported a month-to-month increase for the third consecutive month. The index reached a composite score of 186.32, up 6.02 points (+3.3 percent) from August of 2013 and represented the seventh month this year that the index witnessed month-to-month gains. Compared to a year ago, the AGEM Index is up 57.48 points, or 44.6 percent. During the month, 12 of the 18 global gaming operators reported month-to-month increases in stock price, with six up by more than five percent. Of the six operators that witnessed declines in stock price in September, half fell by less than one percent.

The AGEM Index reported slightly better results than the Dow Jones Industrial Average (DJIA) and S&P 500 in September. The DJIA ended the month at 15,129.67, up 2.2 percent from the prior month. The S&P 500 increased 3.0 percent to 1,681.55. Meanwhile, NASDAQ performed better than the AGEM Index, ending the month at 3,771.48, up 5.1 percent from August.

Selected positive contributors to the September 2013 AGEM Index included the following:

- With a stock price of \$61.67 (+7.4 percent) Crane Co. (CR) contributed 1.59 points.
- Konami (KNM) reported a stock price of \$23.18, up 5.8 percent, and contributed 1.17 points to the index.
- Due to a 13.2-percent increase in stock price to \$16.17, Scientific Games Corporation (SGMS) contributed 1.09 points.

Selected negative contributors included the following:

- Multimedia Games (MGAM) contributed negative 0.72 points, due to a 12.0-percent decline in stock price to \$34.55.
- Bally Technologies (BYI), Gaming Partners International (GPIC) and Wells-Gardner Electronics (WGA) modestly impacted the index during the month.

AGEM	Exchange: Symbol (Currency)	Stock Price At Month End			Percent Change		Index Contribution
		Sep-13	Aug-13	Sep-12	Prior Period	Prior Year	
Ainsworth Game Technology	ASX: AGI (AU\$)	4.27	4.06	2.26	5.17	88.94	0.64
Aristocrat Technologies	ASX: ALL (AU\$)	4.62	4.52	2.69	2.21	71.75	0.74
Astro Corp.	Taiwan: 3064 (NT\$)	38.10	38.30	37.70	(0.52)	1.06	0.00
Bally Technologies	NYSE: BYI (US\$)	72.06	72.13	49.39	(0.10)	45.90	(0.02)
Crane Co.	NYSE: CR (US\$)	61.67	57.41	39.93	7.42	54.45	1.59
Daktronics, Inc.	Nasdaq: DAKT (US\$)	11.19	10.69	9.51	4.68	17.67	0.13
Gaming Partners International	Nasdaq: GPIC (US\$)	8.11	8.26	6.35	(1.82)	27.72	(0.01)
Global Cash Access	NYSE: GCA (US\$)	7.81	7.70	8.05	1.43	(2.98)	0.04
GTECH S.p.A.	MILAN: GTK.MI (€)	21.14	21.27	17.12	(0.61)	23.48	0.58
IGT	NYSE: IGT (US\$)	18.93	18.89	13.09	0.21	44.61	0.06
INTRALOT S.A.	ATHEX: INLOT (€)	1.64	1.51	1.32	8.61	24.24	0.24
Konami	NYSE: KNM (US\$)	23.18	21.90	22.64	5.84	2.39	1.17
Multimedia Games	Nasdaq: MGAM (US\$)	34.55	39.24	15.73	(11.95)	119.64	(0.72)
Scientific Games Corporation	Nasdaq: SGMS (US\$)	16.17	14.29	8.28	13.16	95.29	1.09
SHFL Entertainment	Nasdaq: SHFL (US\$)	22.97	22.77	15.81	0.88	45.29	0.07
Transact Technologies	Nasdaq: TACT (US\$)	13.09	8.88	7.45	47.41	75.70	0.32
Wells-Gardner Electronics	AMEX: WGA (US\$)	1.72	1.90	2.25	(9.47)	(23.56)	(0.01)
WMS Industries	NYSE: WMS (US\$)	25.95	25.70	16.38	0.97	58.42	0.08

Change in Index Value 6.02

AGEM Index Value: August 2013 180.30

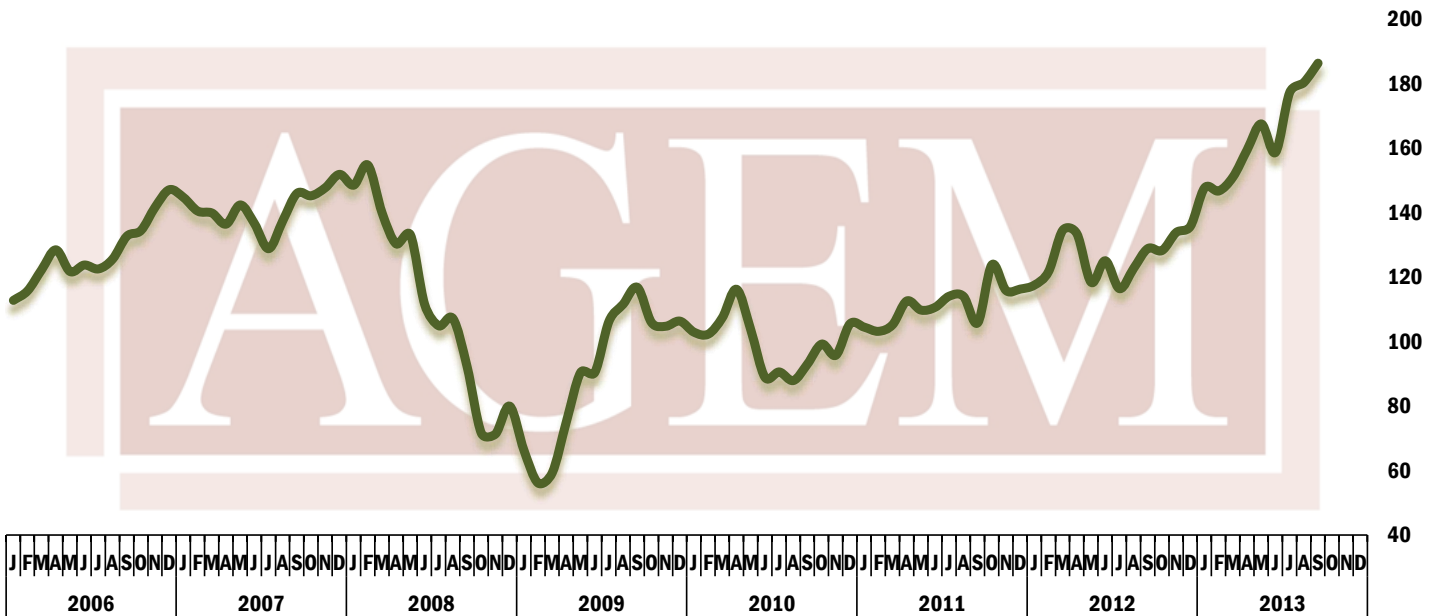
AGEM Index Value: September 2013 186.32

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In the last week of September, more than 27,000 attendees flocked to this year's Global Gaming Expo (G2E) at the Sands Convention Center in Las Vegas for a chance to see new games and products that gaming equipment manufacturers have in store. Selected highlights are noted below.

Manufacturers unveiled a number of new games themed after popular movies and other licensed brands at this year's event. International Game Technology (IGT) will soon offer slot machines based on James Cameron's *Avatar*, *Bridesmaids* and *Jurassic Park*. Bally Technologies (BYI) is theming its new games after *Titanic*, *David Copperfield*, *ZZ Top* and *Grease*, while WMS Industries (WMS) has developed slot machines centered around *Iron Man* and *Ferris Bueller's Day Off*. In addition, Australian gaming equipment manufacturer Aristocrat Technologies (ALL) unveiled games based on *Flashdance*, AMC's *The Walking Dead* and the television series *Batman*.

IGT went to this year's G2E with its new brand identity that the company says is forward-looking for the company, including DoubleDown Interactive. In addition to its new branded game offerings, IGT unveiled a number of systems, including *Tournament Manager 3.0*, which allows users to experience a live poker tournament while playing at a video terminal. In addition, the company unveiled its *On Demand Suite*, which offers players beverages, valet, security and other

services on demand. IGT also made headlines for receiving the American Gaming Association's (AGA) Gaming Voice 'Best 2012 Annual Report' Award for creating the industry's first interactive annual report.

Konami Gaming (KNM) introduced its new casino management system called SYNKROS. The system is designed to manage data from all of a casino's slot machines, customer information and accounting systems in real time. Meanwhile, WMS announced its 3-reel mechanical *Blade Stepper*, which combines the look and feel of a classic pull-handle slot machine with more modern designs and slot floor capabilities. The company is also developing 45 new themes for the popular *Blade* video product line.

A major highlight for Bally Technologies was its new *Bally Enterprise Progressive System (BEPS)*, which allows casinos to securely manage their progressive slot machines from one central location. In addition, the company unveiled two additions to its *Pro Series* cabinets: *ALPHA 2 Pro Series Wave* (with a 40-inch LCD); and the *Pro V55 Jumbo* platform (with a 55-inch touchscreen display). The investments, branding and technology advancements from all companies were prominently displayed at G2E and are expected to pique the interest of consumers and gaming operators around the world.



The AGEM Index

The Association of Gaming Equipment Manufacturers (AGEM) produces the monthly AGEM Index that comprises 18 global gaming suppliers throughout the world. A total of 13 suppliers are based in the United States and are listed on the NYSE, Nasdaq, or AMEX, while two trade on the Australian exchange, one supplier trades on the Athens exchange, one trades on the Milan exchange, and another trades on the Taiwan OTC exchange. The index is computed based on the month-end stock price (adjusted for dividends and splits) of each company and weighted based on approximation of market capitalization. Market capitalizations for manufacturers trading on foreign exchanges have been converted to US dollar-equivalents as of month-end for comparability purposes. The AGEM Index is based on a 100-point value as of January 2005.

About AGEM

AGEM is an international trade association representing manufacturers of electronic gaming devices, systems, and components for the gaming industry. The Association works to further the interests of gaming equipment manufacturers throughout the world. Through political action, tradeshow partnerships, information dissemination and good corporate citizenship, the members of AGEM work together to create benefits for every company within the organization. Together, AGEM and its member organizations have assisted regulatory commissions and participated in the legislative process to solve problems and create a positive business environment.

AGEM Index

The AGEM index and overview is prepared by Applied Analysis (AA). AA is a Nevada-based advisory services firm providing consultation services for public and private entities. The company utilizes extensive experience in economics, information technology and finance to provide a wide range of services, including urban economic consulting, financial advisory services, market analysis, public policy analysis, hospitality industry and gaming consulting, and information system and technology consulting.



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AGEM Membership Roster

AGEM Gold Members:

- Ainsworth Game Technology
- Aristocrat Technologies
- Aruze Gaming America
- Austrian Gaming Industries
- Bally Technologies
- Global Cash Access (GCA)
- GTECH S.p.A.
- International Game Technology (IGT)
- Intralot S.A.
- Konami Gaming
- Multimedia Games
- Scientific Games Corporation
- SHFL Entertainment
- Video Gaming Technologies (VGT)
- WMS Gaming

AGEM Silver Members: Action Gaming, American Gaming Systems (AGS), Casino Technology, Gaming Partners International (GPI), JCM Global, MEI, Merkur Gaming, Ortiz Gaming, Suzo-Happ Group, TCSJohnHuxley, Wells-Gardner Electronics and Zitro.

AGEM Bronze Members: Abbiati Casino Equipment, Alfastreet, Astro Corp., Bingotimes Digital Technology, Cadillac Jack, Cammegh Limited, Cantor Gaming, CastNET, Cole Kepro International, Crane Payment Solutions/ CashCode/ Money Controls, Euro Games Technology (EGT), Galaxy Gaming, Gaming Support, Glory Global Solutions, Incredible Technologies, Inspired Gaming, Interblock USA, ISMS, Iverson Gaming Systems, Jumbo Technology, Matsui Gaming Machine Co., Modern Gaming, Patriot Gaming & Electronics, Quixant Ltd., Reel Games and Table Trac.

AGEM Associate Members: 3M Touch Systems, Advanced Micro Devices (AMD), Advantech-Innocore, Arrow International, British Group Interactive (BGI), Brown & Brown Insurance of Nevada, Camryn Industries, Carmanah Signs, Casino Enterprise Management, Cooper Levenson, Cybertec Gaming Systems, Daktronics, Digital Instinct, DiTronics Financial Services, DynaGraphic Printing, Eastsign International Limited, Elite Gaming Technology, Esterline Interface Technologies, Eurocoin, Flextronics, Fox Rothschild, FutureLogic, Gaming Capital Group, Gary Platt Manufacturing, Gemaco Inc., Genesis Interactive Technologies, GeoComply USA Inc, Global Experience Specialists (GES), Global Gaming Group (G3), Grand Products Nevada, Greenberg Traurig, Hanco Technologies, Howard & Howard, Impact Display Solutions, Intel, International Network in Advance Gaming (INAG), IPS, James Industries, JCS Technologies, Jones Walker, KEY-BAK, Kontron, Leap Forward Gaming, Lewis Brisbois Bisgaard & Smith, Lewis Roca Rothgerber, Litemax Technology, Metalcraft, Outpost Creative, Portwell, Proforma GPS, Rainmaker, Regulatory Management Counselors (RMC), Renewable Creative, Rye Park Gaming, SCA Gaming, Sightline Payments, Southwest Manufacturing Solutions, Spin Games, Strategy9, StylGame USA, Talent Associates, The Bright Group, Tournament One, TOVIS, TransAct Technologies, Union Gaming Group, Vantiv Gaming Solutions, Veridocs, Wrex Products and Young Electric Sign Company (YESCO).