

# AGEM Index

Association of Gaming Equipment Manufacturers

September 2014

The AGEM Index declined in September 2014 when compared to August 2014, falling 3.08 points (-1.6 percent) to a composite index of 187.50. The latest period represents the sixth decline in the past nine months. Compared to the same month a year ago, the AGEM Index reported a modest increase of 1.18 points (+0.6 percent).

In September, nine of the 17 global gaming equipment manufacturers reported a month-to-month decline in stock price, with eight falling by more than five percent. Of the eight manufacturers reporting gains in stock price in the latest period, three were up by more than five percent.

The broader stock markets reported similar declines in September 2014. The Dow Jones Industrial Average fell 0.3 percent compared to August 2014, ending the month at 17,042.90. The S&P 500 closed the month at 1,972.29, which represents a 1.6-percent decline from the prior month. Meanwhile, NASDAQ reported the largest monthly decline of the major indices, falling 1.9 percent to 4,493.39.

Selected positive contributors to the September 2014 AGEM Index included the following:

- Multimedia Games (MGAM) reported a stock price of \$36.01 (+29.5 percent) and contributed 2.33 points.
- Due to a 3.9-percent gain in stock price to €18.81, GTECH S.p.A. (GTK) contributed 0.65 points.
- Scientific Games Corporation (SGMS) contributed 0.41 points due to a 6.1-percent gain in stock price to \$10.77.

Selected negative contributors included the following:

- Crane Co. (CR) contributed negative 2.53 points due to a 9.2-percent decline in stock price to \$63.21.
- With a stock price of \$20.78 (-10.0 percent), Konami Gaming (KNM) contributed negative 2.21 points.

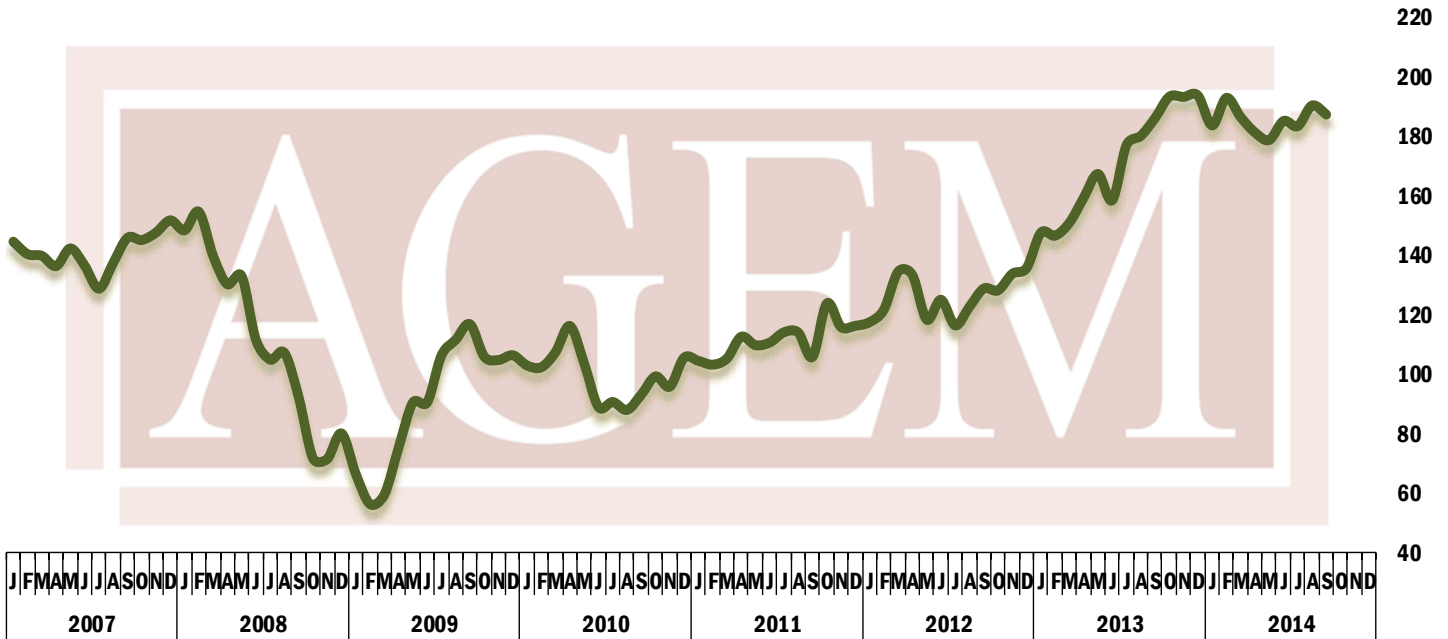
AGEM	Exchange: Symbol (Currency)	Stock Price At Month End			Percent Change		Index Contribution
		Sep-14	Aug-14	Sep-13	Prior Period	Prior Year	
AG&E Holdings Inc.	AMEX: WGA (US\$)	1.12	1.26	1.72	(11.11) ↓	(34.88) ↓	(0.01)
Ainsworth Game Technology	ASX: AGI (AU\$)	3.03	3.36	4.27	(9.82) ↓	(29.04) ↓	(0.96)
Aristocrat Technologies	ASX: ALL (AU\$)	5.84	5.53	4.62	5.61 ↑	26.41 ↑	(0.13)
Astro Corp.	Taiwan: 3064 (NT\$)	36.60	37.80	38.10	(3.17) ↓	(3.94) ↓	(0.03)
Bally Technologies	NYSE: BYI (US\$)	80.70	79.29	72.06	1.78 ↑	11.99 ↑	0.41
Crane Co.	NYSE: CR (US\$)	63.21	69.59	61.67	(9.17) ↓	2.50 ↑	(2.53)
Daktronics, Inc.	Nasdaq: DAKT (US\$)	12.29	13.16	11.19	(6.61) ↓	9.83 ↑	(0.26)
Galaxy Gaming Inc.	OTCMKTS: GLXZ (US\$)	0.39	0.38	0.22	2.63 ↑	77.27 ↑	0.00
Gaming Partners International	Nasdaq: GPIC (US\$)	8.43	8.29	8.11	1.69 ↑	3.95 ↑	0.01
Global Cash Access	NYSE: GCA (US\$)	6.75	7.81	7.81	(13.57) ↓	(13.57) ↓	(0.45)
GTECH S.p.A.	MILAN: GTK.MI (€)	18.81	18.11	21.14	3.87 ↑	(11.02) ↓	0.65
IGT	NYSE: IGT (US\$)	16.87	16.86	18.93	0.06 ↑	(10.88) ↓	0.02
INTRALOT S.A.	ATHEX: INLOT (€)	1.60	1.77	1.64	(9.60) ↓	(2.44) ↓	(0.27)
Konami	NYSE: KNM (US\$)	20.78	23.10	23.18	(10.04) ↓	(10.35) ↓	(2.21)
Multimedia Games	Nasdaq: MGAM (US\$)	36.01	27.81	34.55	29.49 ↑	4.23 ↑	2.33
Scientific Games Corporation	Nasdaq: SGMS (US\$)	10.77	10.15	16.17	6.11 ↑	(33.40) ↓	0.41
Transact Technologies	Nasdaq: TACT (US\$)	6.74	7.79	13.09	(13.48) ↓	(48.51) ↓	(0.06)
Change in Index Value							(3.08)
AGEM Index Value: August 2014							190.58
<b>AGEM Index Value: September 2014</b>							<b>187.50</b>

www.AGEM.org

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The Sands Expo Center in Las Vegas hosted the 14<sup>th</sup> annual Global Gaming Expo (G2E) from September 30 through October 2. At the event, an estimated 480 exhibitors showcased their new products, including slot machines, video game technology and security products. An estimated 27,000 attendees were at this year's event which was up four percent from last year. In addition, according to the Las Vegas Convention and Visitors Authority, G2E had a \$22.3 million impact on the local economy.

A number of gaming equipment manufacturers introduced new slot machines based on popular movies and television series at G2E this year. International Game Technology (IGT) unveiled two new slot machines based on "The Ellen DeGeneres Show." Bally Technologies (BYI) announced games based on the popular shows "Friends" and "Duck Dynasty." In addition, the company unveiled "Wonder Woman Wild" and "Wonder Woman Gold" as well as "Betty Boop's Firehouse" and "Betty Boop's 5<sup>th</sup> Avenue."

"Sons of Anarchy" will also make its debut on the casino floor with Aristocrat Technologies' (ALL) new slot machines based on the FX cable network series that continues to grow in popularity. Other popular brands that will soon be offered include Ainsworth Game Technology's (AGI) products based on the movies *Showgirls* and *The Sound of Music* and WMS Gaming's (SGMS) games based on "Mad Men" and *Austin Powers*.

Other highlights from G2E 2014 include WMS' debut of two new player-focused hybrid slant Blade cabinets, Blade s23 and Blade s32, and Ortiz Gaming's new cabinet, O-Circle, which includes a curved display and surround sound for increased player engagement. In addition, IGT introduced its S3000 cabinet, which will provide a new take on spinning reel games. Also, the company's Advantage<sup>®</sup> System will be able to connect each player's data from DoubleDown Casino to their land-based casino play, which will allow operators to better track their preferences.

Konami Gaming (KNM) introduced Slot Dispatching on its SYNKROS<sup>®</sup> Konetic Mobile Employee App<sup>™</sup>, which is compatible on iOS and Android phones and allows slot attendants and technicians to receive service requests quickly and efficiently. Meanwhile, TCSJohnHuxley launched seven new products, including Gaming Floor Live. The product allows data gathered from table games to be analyzed in real time to help casino operators manage their floors more efficiently.

The Global Gaming Expo continues to grow as gaming equipment manufacturers keep pace with an evolving gaming industry and technological advancements. The marquee event of the year demonstrates the entrepreneurial spirit of small- to large-scale firms maximizing consumer play and operator productivity.



[www.AGEM.org](http://www.AGEM.org)

## The AGEM Index

The Association of Gaming Equipment Manufacturers (AGEM) produces the monthly AGEM Index that comprises 17 global gaming suppliers throughout the world. A total of 12 suppliers are based in the United States and are listed on the NYSE, Nasdaq, AMEX or OTC market, 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
- International Game Technology (IGT)
- Intralot S.A.
- Konami Gaming
- Multimedia Games
- Scientific Games / WMS
- Video Gaming Technologies (VGT)

**AGEM Silver Members:** Action Gaming, AG&E Holdings Inc., American Gaming Systems (AGS), Casino Technology, Crane Payment Innovations (CPI), Gaming Partners International (GPI), JCM Global, Merkur Gaming, Ortiz Gaming, Suzo-Happ Group, TCSJohnHuxley and Zitro.

**AGEM Bronze Members:** Abbiati Casino Equipment, Alfastreet, Amatic Industries, Astro Corp., Bingotimes Digital Technology, Boss Gaming, Cadillac Jack, Cammegh Limited, CG Technology (CGT), Cole Kepro International, Euro Games Technology (EGT), Galaxy Gaming, Gambelit Gaming, Gaming Support, Glory Global Solutions, Gold Club, Grand Vision Gaming, Incredible Technologies, Inspired Gaming, Interblock USA, Intervision Gaming, ISMS, Iverson Gaming Systems, Jumbo Technology, Matsui Gaming Machine Co., Metronia, Modern Gaming, NYX Gaming Group, Patriot Gaming & Electronics, Quixant Ltd., Reel Games, Table Trac, U1 Gaming and Win Systems.

**AGEM Associate Members:** 3M Touch Systems, Adlink Technology, Advantech-Innocore, AMD, Arrow International, Asimex Global, Atrient, British Group Interactive (BGI), Brown & Brown Insurance of Nevada, Camryn Industries, Carmanah Signs, Casino Enterprise Management, Catapult Global, Coloredge, Cooper Levenson, Cybertec Gaming Systems, Daktronics, Digital Instinct, DiTronics Financial Services, DynaGraphic Printing, Eilers Research, Elite Gaming Technology, Esterline Interface Technologies, Fantini Research, Fox Rothschild, FutureLogic, GameAccount Network, Gaming Capital Group, Gary Platt Manufacturing, Gasser Chair Company, Genesis Interactive Technologies, GeoComply USA, Global Experience Specialists (GES), Global Gaming Group (G3), Greenberg Traurig, Hanco Technologies, Howard & Howard, Impact Display Solutions, Intel, IPS, Ipsos, James Industries, JCS Technologies, Joingo, Jones Walker, KEY-BAK, Kontron, Lazcano Sámano, Leap Forward Gaming, Lewis Brisbois Bisgaard & Smith, Lewis Roca Rothgerber, Lightstone Solutions, McGladrey LLP, Metalcraft, Olsen Gaming/Spectronix, Outpost Creative, Portilla, Ruy-Díaz y Aguilar, Portwell, Proforma GPS, Rainmaker, Regulatory Management Counselors (RMC), Renewable Creative, Robert Half Technology, SCA Gaming, Sightline Payments, Southwest Manufacturing Services, Spin Games, Strategy9, StylGame USA, Talent Associates, The Bright Group, Tournament One, TOVIS, TransAct Technologies, Twain Financial Partners, Vantiv Gaming Solutions, Veridocs, Wells Fargo and Young Electric Sign Company (YESCO).