



Symposium on Racing & Gaming 2011



Summary

- o PMU Overview
- o PMU International
- o Groupe Carrus

PMU Overview



Role and mission

- **PMU is an Economic Interest Group created by the French horseracing associations in 1930.**
- **PMU conceives, promotes, markets and totalizes bets on horse races.**
- **In 2010, following the opening of the French online gambling market, PMU has extended its offer to online sports betting and online poker.**
- **One single objective: Bring the highest possible financial resources to horseracing associations.**





Key facts and figures

- **1st pari-mutuel company in Europe with € 9.45 billion handle in 2010 and 2nd pari-mutuel company in the world**
- **€ 10.5 million** : record winnings on October 7th, 2011
- *Customers :*
 - *6.5 million customers*
 - *500,000 active accounts*
 - *15 million households subscribing to PMU's TV Channel Equidia*



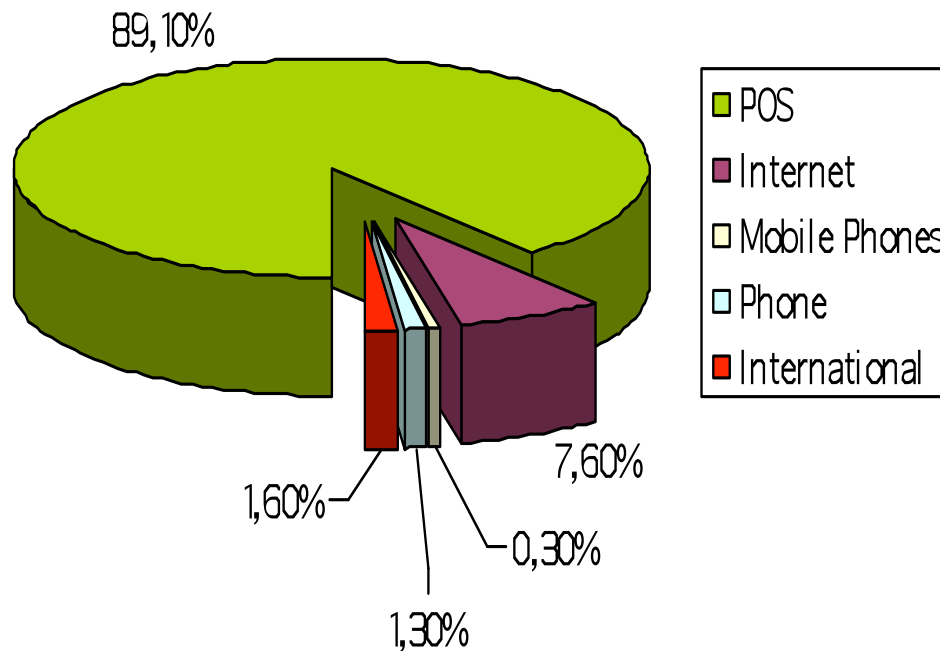
PMU.FR





Sales Network

Sales distribution in 2010



11 000

sales outlets

89.1%

of PMU's global turnover comes from POS

7.6%

of PMU's global turnover comes from Internet

→ Internet & Mobile Phones shares have both increased versus year 2009 :

-Internet : +7%

-Mobiles Phones : +260%



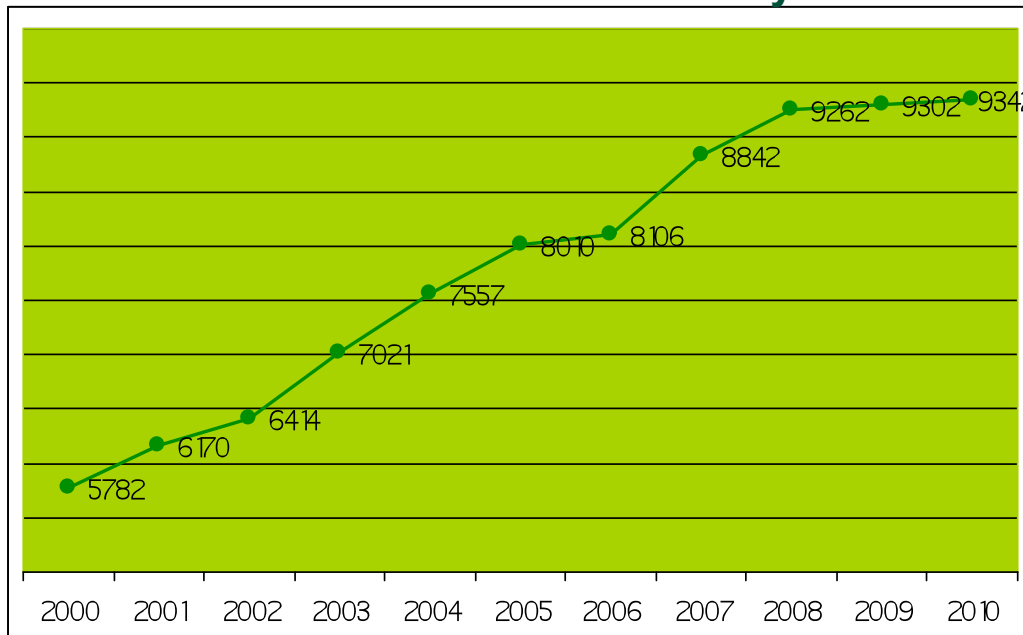
Horseracing activity

In 2010, betting increased by 0.4%, reaching 9 342 million Euros

Turnover origin:

- 89.1% from POS
- 9.3% from Online sales
- 1.6% from International

A 38% increase in turnover since year 2000



9.35

billion euros turnover

6.9

billion euros redistributed to punters

74.8%

global rate of return to punters

731

million euros net profit paid to the horseracing authorities

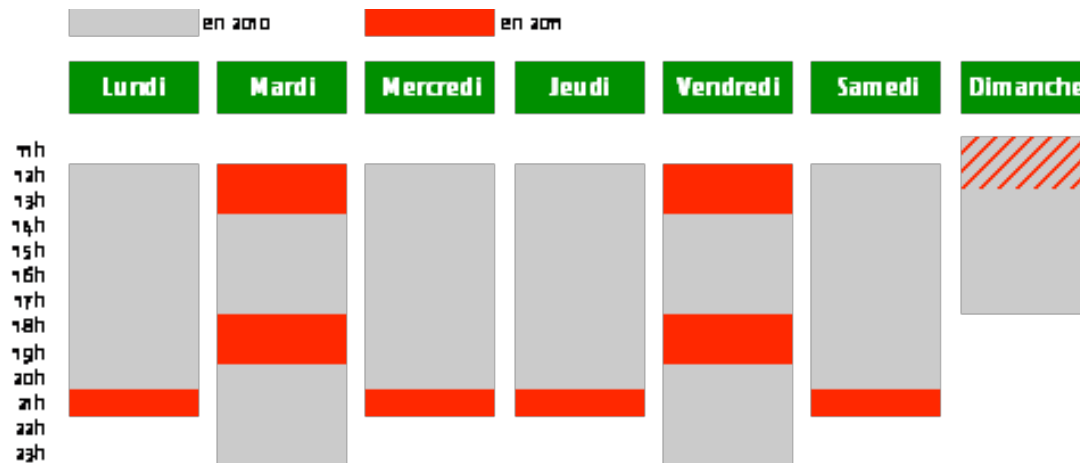


Race program policy

The French race program policy: a regular and ordered schedule to ease and match punter's habits

A regular progression of the number of races:

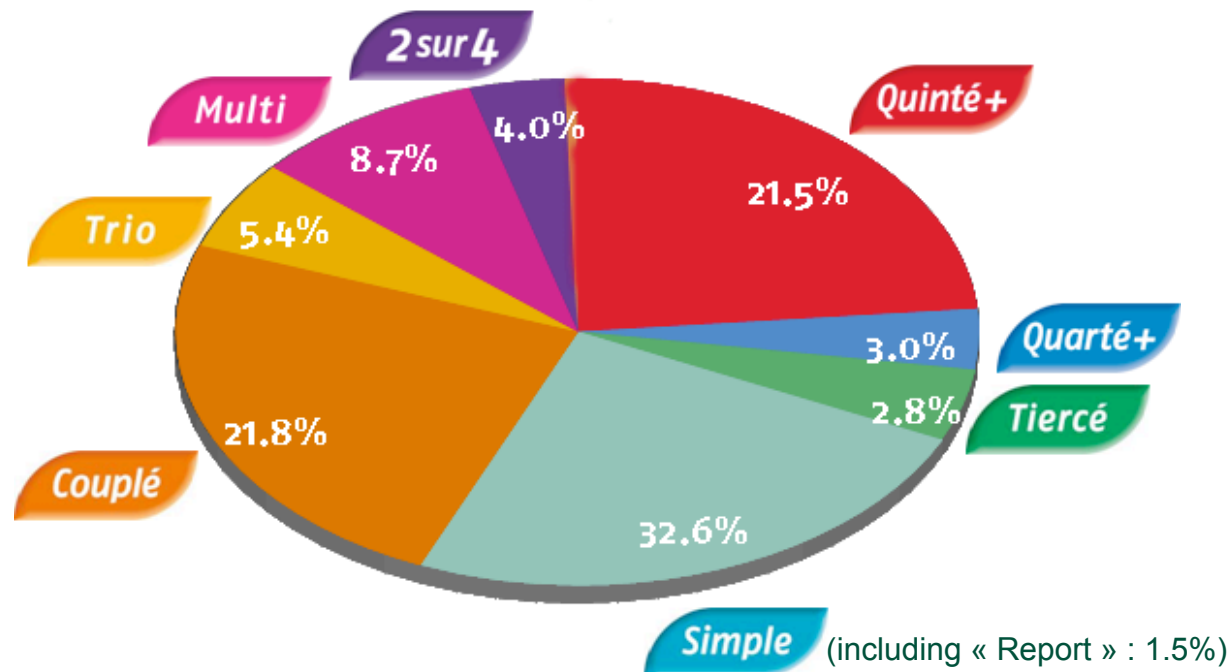
- by extending the daily time slot from 12.00 to 20.00: development of midday and twilight meetings
- with a 15 minutes interval between two races
- and with every race broadcasted in Equidia with real-time odds before the race





Product range

- A large line of products: 8 products
- 3 major bets that make 76% of global turnover : Simple, Couplé & Quinté+



Part of each bet in the 2010 turnover



Focus on Pariez spOt



'Pariez spOt' is an automatic betting system allowing people to bet on horseracing without necessary being experts.

Available on :       

'Pariez spOt' automatically selects the horses according to the bets already recorded in the day by other betters : horses that has been played the most have more chance to be selected by 'Pariez spOt'.

- **Automatic spOt:** Pariez spOt selects every horses of your bet
- **Semi-automatic spOt:** you select one or more horses, Pariez spOt completes your bet

- 48% of PMU clients use Pariez spOt at least once a year
- 23% of the Quinté+ turnover comes from Pariez spOt
- Biggest winnings with Pariez spOt: - 6 402 360 € in October 2009
- 3 253 040 € in March 2011



PMU INTERNATIONAL



Betting on French racing

- **PMU, entrusted by the French Racing Associations, sells to foreign operators the signal of French horseracing for betting purposes**

- **PMU's partners can offer :**
 - **its whole French racing offer**
 - **a weekly selection**
 - **a selection of trotting or gallop races**
 - **a selection of « Grands Prix »**
 - **a part of or all of its bets**

- **PMU also advises operators in the marketing of that offer**





Pictures and Data

EQUIDIA PRO

Broadcast of an encrypted signal for French races

- 2 channels (pictures / data)
- Several broadcasting tools (satellite, web-streaming...)
- Available in 4 languages

EQUIDIA PRO
EN DIRECT : LE BOUSCAT / PRIX DU CIRON
 DÉPART DANS 06'23" PLAT / 2200M / SIMPLE, JUMELÉ ORDRE 14:41

	1	2	3	4	5	6
MATIN	12	2,9	2,7	6,8	6,2	8,2
	15	3,4	1,8	12	6,2	13

ARRIVÉE DÉF. : ENGHEN / PRIX NIVOLET / 14h05

PLACE			JOCKEY	DISTANCE
1ER	6	UNE SAINTE	J. RICOU	
2EME	4	DELRAY BEACH	L. METAIS	4 L
3EME	12	KIZIT LOVE	A. MESNIL	5 L
4EME	10	FANY BLUE	G. BRUNOT	15 L
5EME	5	MISS COMTRIE	E. LEQUESNE	5 L

NON PARTANT : 7

INFOCENTRE

PMU's database for racing information

- Access through Internet or XML files
- Available in English and French
- Tips available

PMU Engueran Gillet Paris - Date 01 07 08 Heure 16 03 **INFOcentre**

En direct

Heure	Evénement	N° partant	N° course	Réunion	Le
16:02	Départ dans 3 minutes		5	ARGENTAN	01/07/2008
16:08	Rouge à l'arrivée		5	COMPIEGNE	01/07/2008
16:57	Arrivée pronostics validés		5	COMPIEGNE	01/07/2008
16:55	Arrivée pronostics		5	COMPIEGNE	01/07/2008

Informations hippiques

01/07/2008 - réunion 1 - COMPIEGNE - course 1 - BI CHATEAU

Programme	Place / Arrivés course	Départ actualisés	Fin pronostics
1 - SUNRISE SPIRIT			
2 - MONDOVINO			
3 - SAN REAL			
4 - MONTMAREN			
5 - DORIS DE TISE			
6 - 88 BAROIS			
7 - REALIS			
8 - ARKANDO			
9 - LE CARNAVAL			
10 - LERANDON PRINCE			
11 - VORTEX GENERATOR			

Liste des partants

N°	Nom	Caract.	Age	Jockey	Propriétaire	Entr.		
1	SUNRISE SPIRIT	9	H 7	D. BUEP	HOTTON	N		
2	MONDOVINO	13	M 5	O. FELSNER	ERIE FORET JAUNE	N		
3	SAN REAL	1	H 6	Y. LERNER	SOLHONNE	O		
4	MONTMAREN	8	M 6	G. BENOIST	M. ROVELACQUE	N		
5	NOW THE TIGER	06	2	H 5	T. GILLET	PJ. CHRISTEY	N	
6	BY DARDILE	7	H 5	T. JARRET	Mlle S. TARROU (S)	G. FARIENTE	N	
7	BRALIN	6	H 5	CP. LEMARE	Mlle LAUDON	E. MELENDES	N	
8	ARKANDO	GER	11	H 7	W. RONGIL	M. TRYBHAL	STALL LINA	N
9	LE CARNAVAL	16	M 6	T. THULLIEZ	E. SOTTEAU	E. BERGOUIGNOUX	N	
10	LERANDON PRINCE	4	H 4	F. FORESI	F. FORESI	ECURIE LERDA	N	





Betting on French racing

Two kinds of B2B agreements:

- **Separate pool betting:** partners generate their own pool and their own dividends on the basis of bets registered locally.
 - 1.2 billion € turnover registered outside France in 2010
 - 49 partnerships in 38 countries: 12.1 M€ revenues (+26%)
- **Common pool betting:** foreign bets are pooled with French bets:
 - 9 partnerships **147.7 M€** turnover (+14%)
 - 11 partners in 2011:

French speaking Switzerland

Germany

Great Britain

Sweden

Monaco

Austria

Spain

The Netherlands

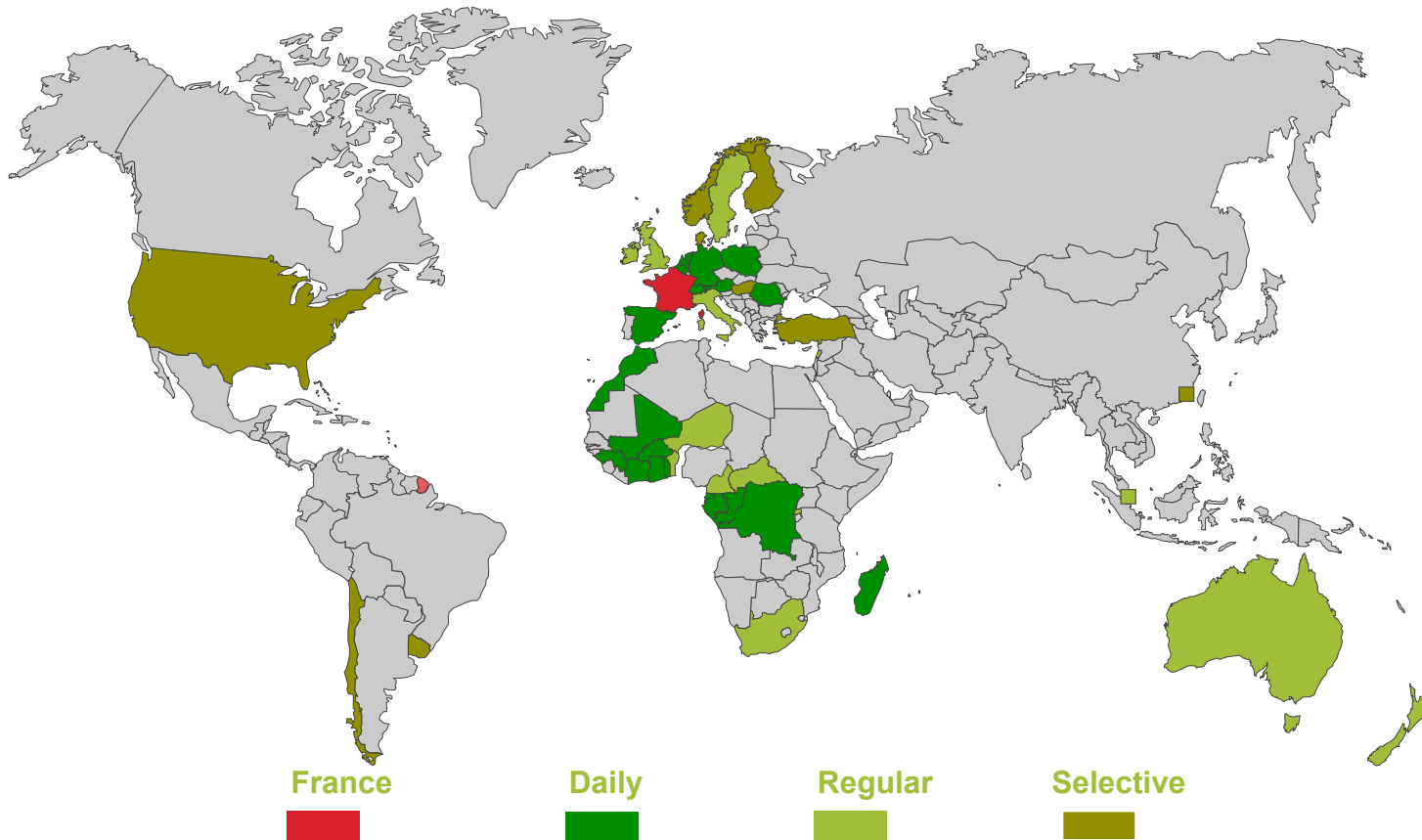
Poland

USA

Finland



PMU's partners abroad



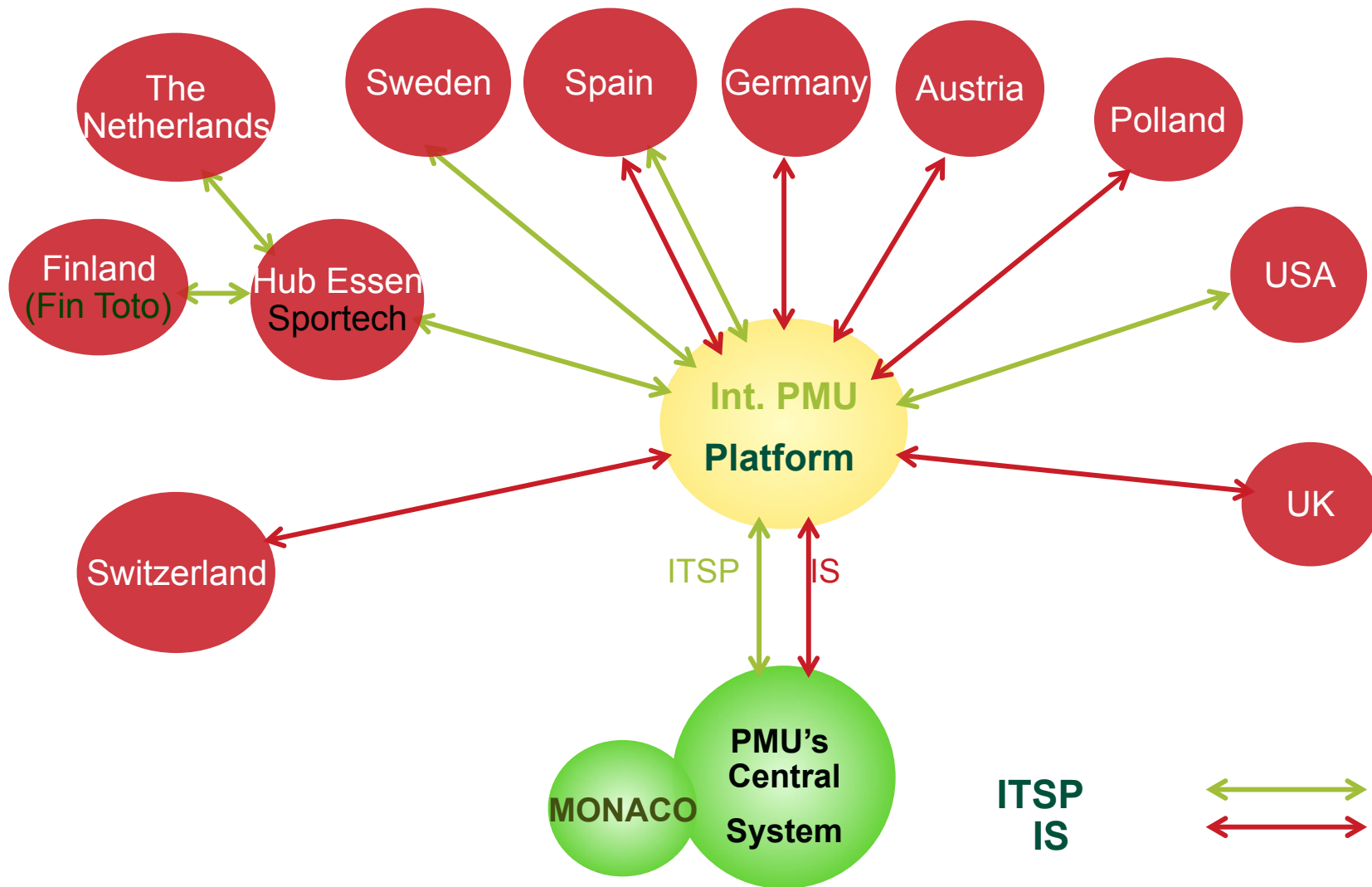


Common Pool

- **Common pool betting on French racing** : enables PMU's foreign partner to take advantage of the size of the PMU pool, the largest one in Europe, to get higher winnings or more stable dividends.
- **IT connexion:**
 - ITSP (Win to Trio Ordre),
 - Synchronous interface (simple and exotic bets)



PMU's International Platform

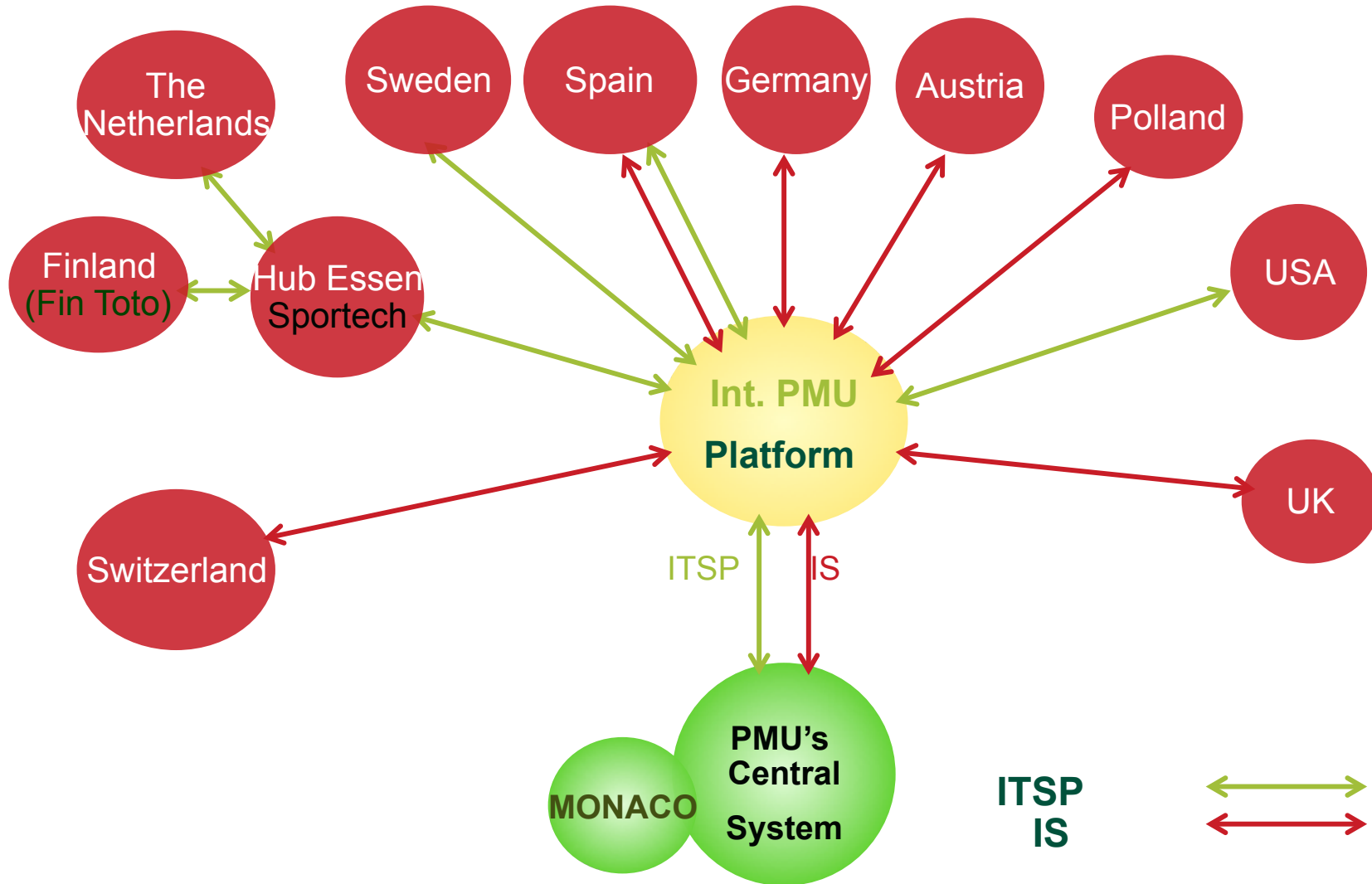


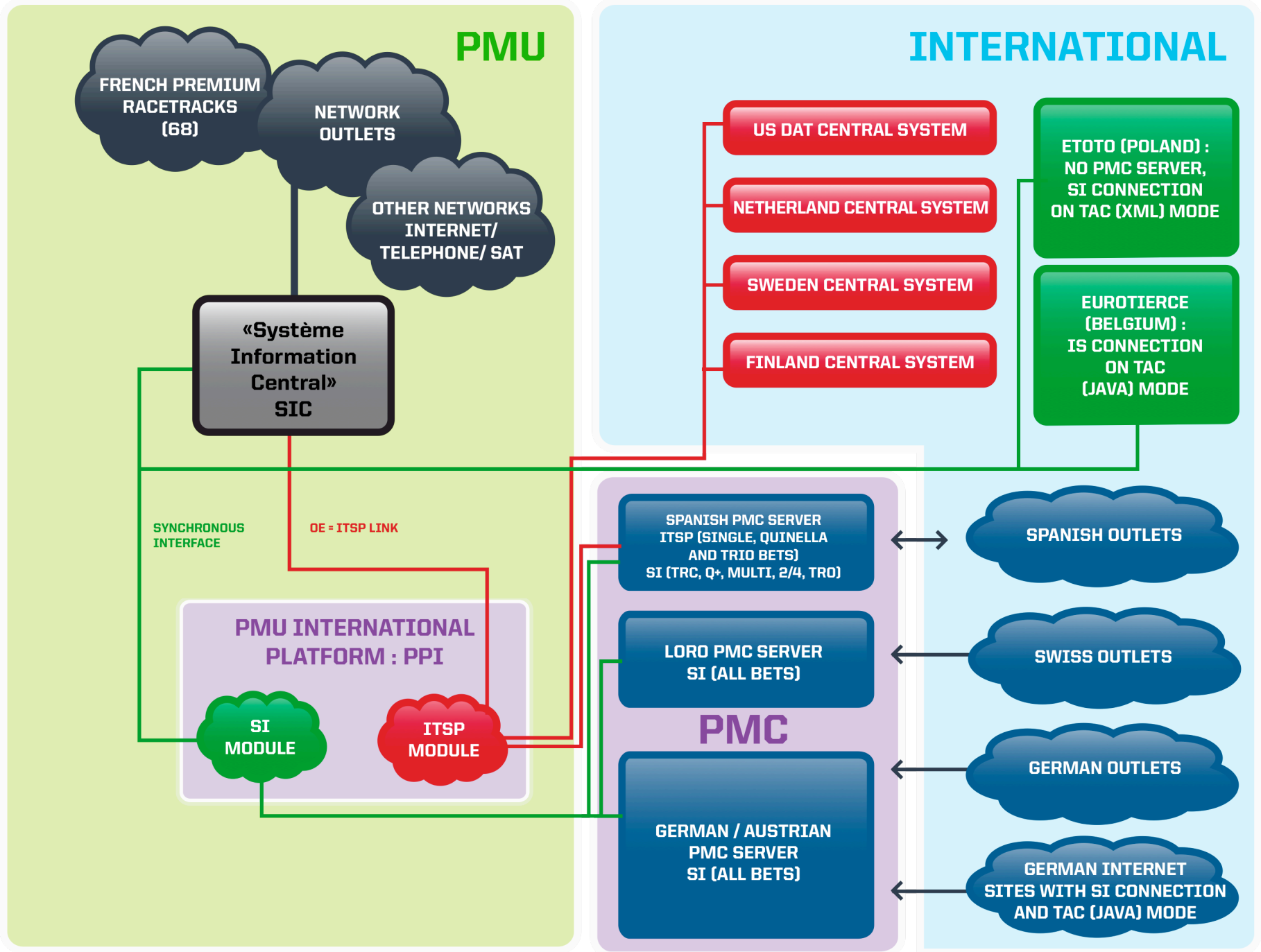
Thank you





PMU's International Platform





CONNECTIONS TYPES :

Synchrone Interface :

Protocol allowing the transmission of any transaction with a confirmation from the PMU before the terminal prints the ticket, required for 2/4, Multi, Tiercé, Quarté+ and Quinté+ bets.

2 modes of exchanges between servers: TAC and TAS

1. TAC (Tote Access Connector) :

Connector supply by PMC with JAVA exchange, required development on JAVA from the operator.

- Secured protocole allowing the confirmation of transactions from the server.
- Fast exchanges allowing broadband (high flow).

2. TAS (Tote access Services) :

Web Service. Exchanges by request XML, which doesn't require a JAVA development.

- No confirmation of transactions from the operator
- Not as fast as TAC

2 modes of exchanges between terminals and server:

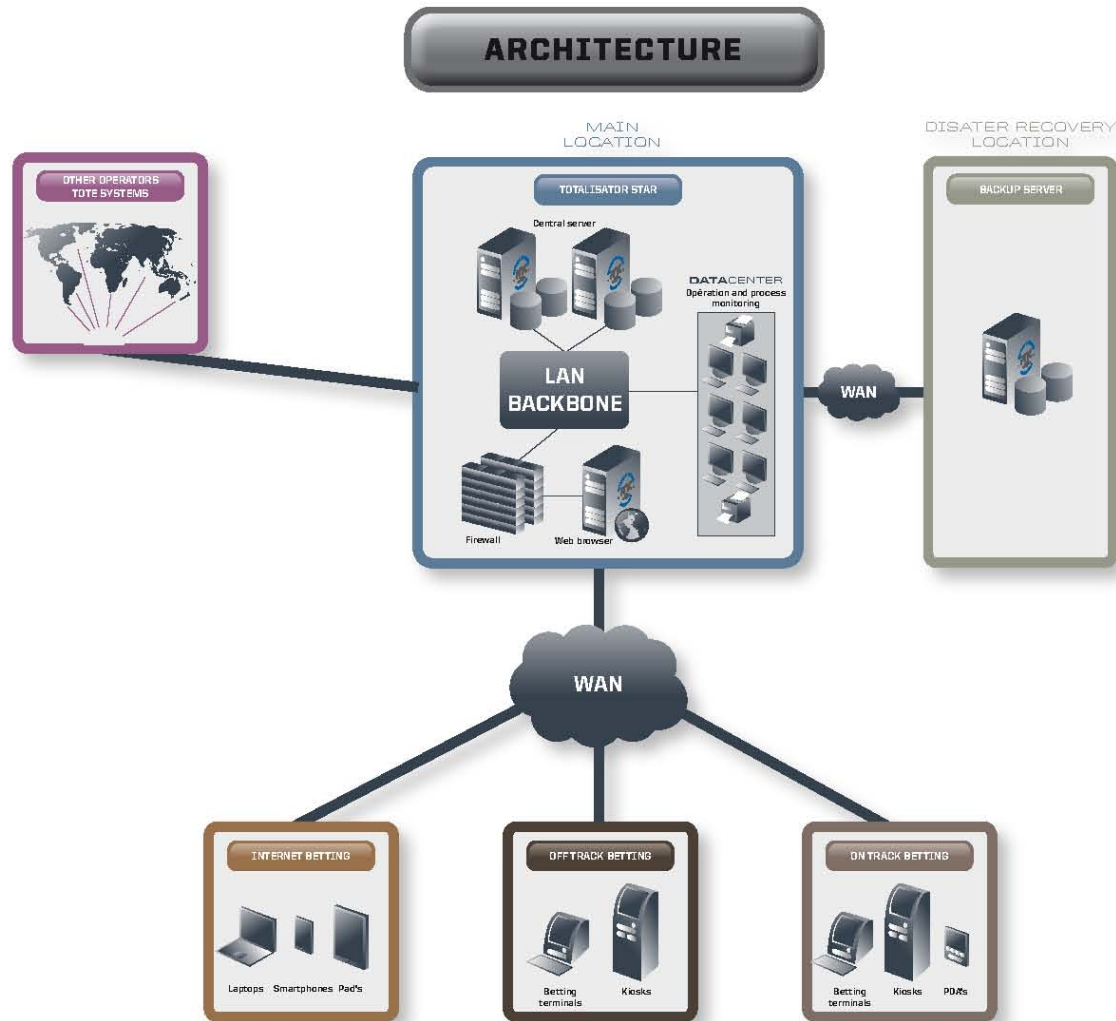
1. PMC Terminals and server

2. Non PMC terminals and server : Application for terminal request XML based. TAC and TAS modes are to be privileged instead of this mode which is too complicated to apply.

ITSP : Inter Tote System Protocol :

1. International exchange protocol is a protocol for bets allocation « Tables de ventilation » for single bets (win and) , couplés (quinella, exacta, swinger) and trios (with or without order)
2. Protocol allowing the transmission of the races chronology and dividends.
3. Interface between two main servers.

PMC STAR TOTALISATOR



The interaction of 3 business units



Pari Mutuel Services



Pari Mutuel Solutions



Pari Mutuel Technologies



Groupe Carrus

The Pari Mutuel company

- Pari-Mutuel : Two words closely intertwined with the history of Groupe Carrus.
- Since its creation more than one century ago, the company has been devoted to this now-global way of betting.

It offers horse racing associations and bettors the best possible services and technology including :

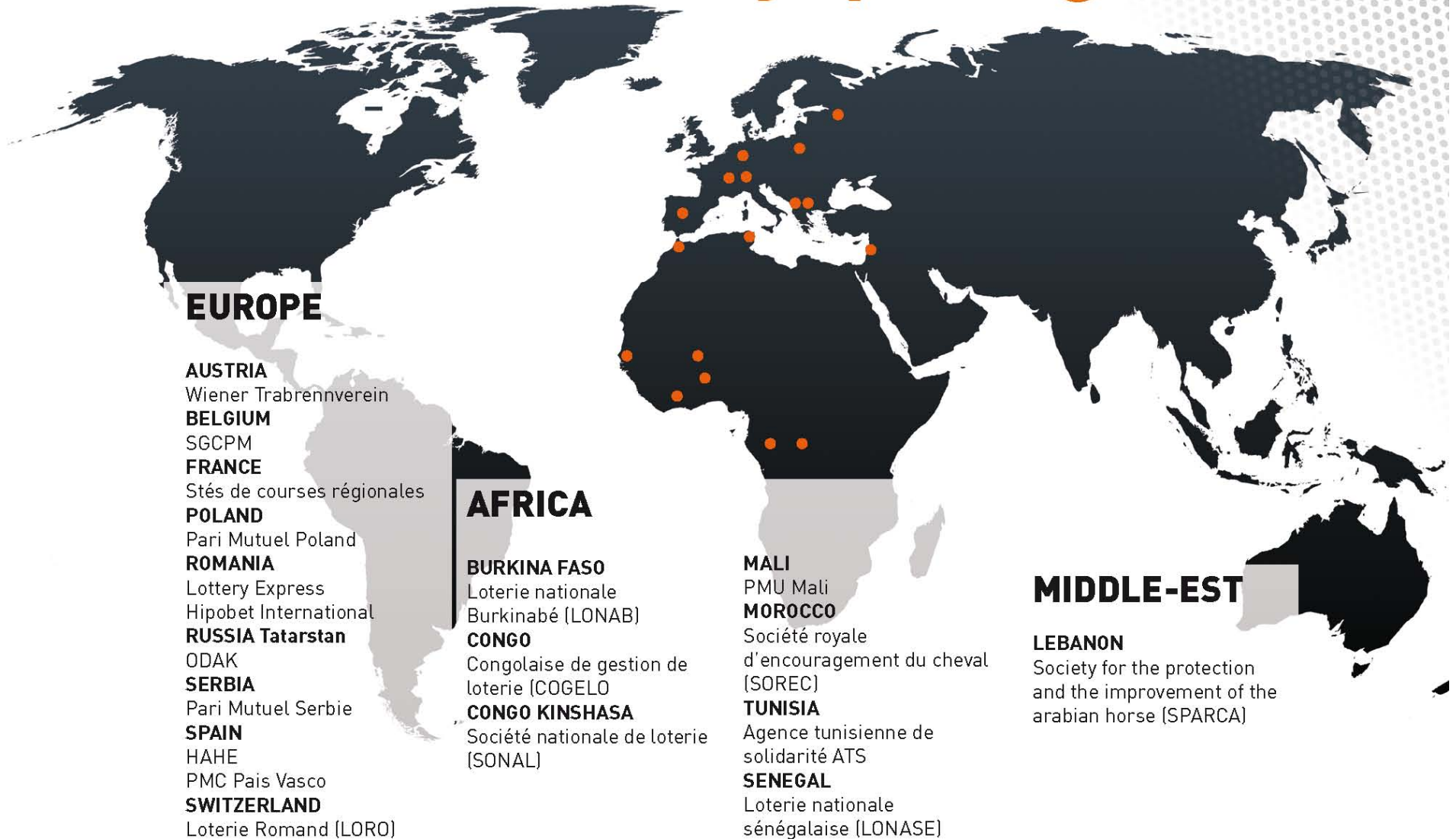
- several hundred tellers at the racecourses
- an exclusive state of the art tote system
- a full service DataCenter 365/24
- cutting-edge self-service kiosks and terminals



A benchmark in betting operations

- Two billion betting tickets issued in France, Belgium, Spain Switzerland, Austria, Germany and many countries in Africa.
- 30 000 windows managed each year on racecourses
About 300 racecourses operated
- 10 000 active terminals at OTB operators shops
- 5 000 kiosks in three European OTB operators
- Supplier of the majority of Pari Mutuel internet operators on the French market

Groupe Carrus Systems currently operating



A large, brightly lit betting area with many people at computer terminals. The scene is filled with activity, with people interacting with the terminals and each other. The background shows a large crowd of people, some standing and some sitting at tables. The foreground shows a close-up of a terminal with a woman in a dark vest with orange trim working on it. The overall atmosphere is one of a busy, professional environment.

Serving operators...

- Devoted to racing operators for more than a century
- The 4th generation represented by Jérôme and Pierre-Antoine Carrus
- Essential contributions to the development of combination bets, especially tiercé
- A long-standing collaboration with the French racing associations and the PMU
- Recently appointed for the development of the PMU key international hub system



Serving bettors...

- In contact with punters at racecourse windows and betting counters through terminals and directly on the kiosks touch screens
- We understand their habits, expectations and fears.
- This expertise is used to understand the demands of the operators and their points of sale, design computer solutions, improve the user interface of the terminals, optimize their performance and security and train tellers.
- Specialist of the very specific Pari Mutuel betting, we invent and develop new products and new services that offer an optimal response to the needs of operators and punters alike.

GROUPE
CARRUS

The_Pari**mutuel**_Company



Merci beaucoup !

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