Product Rex User Profiler 2023-08-02 date: New users New scenarios Amount modelled Last 30 days Last 30 days Last 30 days 2,123 131 \$1,055,457,559 new investments new scenarios new users Users Average number of scenarios per user Average scenario amount per user Last 30 days Last 30 days 2,459 \$2,483,430 users amount modelled scenarios Scenarios Investments Total investments Total scenarios Monthly investments Monthly scenarios 1B 2000 20B 40k Monthly investments 0.8B Monthly scenarios 15B 0.6B 10B 1000 0.4B 500 5B 10k 0.2B 8-2023 7-2023 6-2023 4-2023 3-2023 1-2023 11-2022 11-2022 10-2022 9-2022 9-2022 6-2022 7-2022 4-2022 4-2022 4-2022 1-2022 3-2023 7-2021 3-2022 5-2022 9-2022 11-2022 5-2023 9-2021 11-2021 7-2022 7-2023 1-2022 Date User Role Distribution **Cumulative Users** Adviser Total users 2500 Paraplanner New users 150 Support Staff 2000 7.24% Practice Manager Other 1000 Lotal users New users 100 8.34% 49.6% 11.3% 50 500 18.1% 8-2023 7-2023 6-2023 4-2023 3-2023 1-2023 11-2022 11-2022 10-2022 9-2022 9-2022 8-2022 7-2022 6-2022 4-2022 4-2022 4-2022 1-202 Scenarios by Status (Last 30 days) **User Retention** Last login date per user Active Implemented Abandoned 869 40.3% 56.6% 6 - 12 months 12 - 24 months 1 - 6 months Over 2 years Last login Licensee Penetration Adviser Penetration **Practice Penetration** No. advisers in the practices with at least one user No. practices where there is at least one user No. licensees where there is at least one user 15.1% 27.9% 72.1% 73.9% 84.9% Rest of market Coverage Rest of market Coverage Rest of market Coverage **Number of Advisers Number of Practices** Number of Licensees 940 practices 4,390 advisers licensees User distribution by State User distribution by Gender VIC Male QLD Female NSW WA 16.5% SA 9.58% TAS ACT NT 25.8% 27.1% 83.5% User distribution by Licensee Type Adviser distribution by Licensee Type Reflects all advisers using the scenario modelling tool Reflects all advisers in the market Privately-owned (1-10) Privately-owned (1-10) Privately-owned (11 - 100) Privately-owned (11 - 100) Privately-owned (100+) Privately-owned (100+) Diversified Diversified 9.84% Stockbroker Stockbroker 12% 26.6% Industry super fund / Not-for-profit Industry super fund / Not-for-profit Bank Bank 39.7% 17.3% Limited Licensee 16.7% 19.5%

18.8%

30.3%