

IMAGINARIUM

IMAGINARIUM is a value-added, multichannel retail company with a vertically integrated business model, and its own design and brand, specializing in selling children's games and products. Imaginarium is one of the greatest success stories in the Spanish specialized retail sector.

COMPANY PROFILE as at

11/30/14

Price	1,27
Price as at 12/01/2009	4,31
Equity Market Value	22.118.828,00 €
Nº of Shares	17.416.400
Max/Min	4,50/0,99



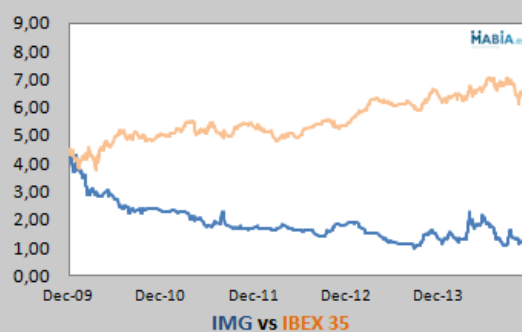
Volume	Shares	Turnover	Capital Increases
2014	632.000	994.000	2014 0
2013	325.000	450.000	2013 0
2012	129.000	208.000	2012 0
2011	523.000	964.000	2011 0
2010	1.709.000	4.814.000	2010 0

Ticker	IMG	Perc. of Equity Market Value in MAB	1,29%
Sector	Consumer Services	Price Performance since 12/01/2009	-70,534

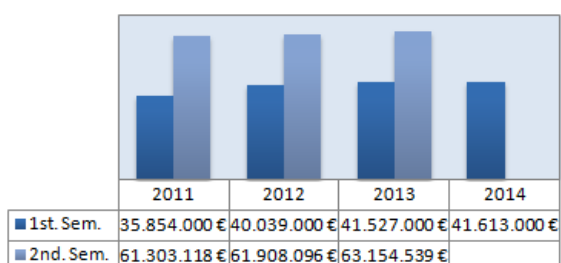
Price Performance per year (%)	2010	2011	2012	2013	2014
Imaginarium	-47,100	-27,632	10,909	-27,869	-3,788
MAB Index	-37,679	-6,312	2,293	183,437	-0,865
IBEX Small Cap Index	-18,316	-25,102	-24,448	44,290	-9,212
IBEX 35 Index	-17,428	-13,113	-4,655	21,417	8,612

MAJOR SHAREHOLDERS

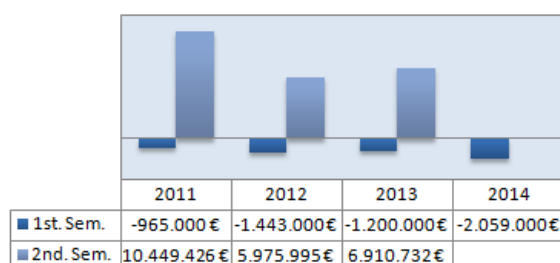
Publifax SL	34,55%
Inroch SL	12,79%
Banco Grupo Cajatrés SA	10,65%
Anexa Capital, SCR de RS, SA	16,38%
Minority shareholders	25,63%



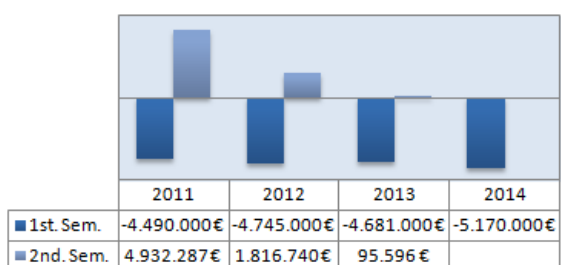
Sales Revenue



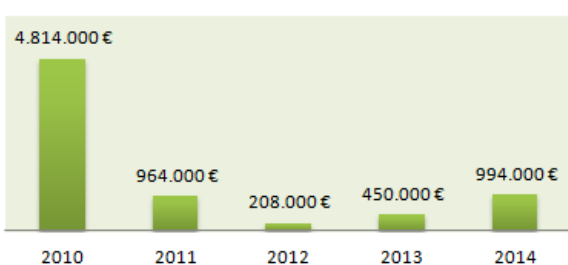
Ebitda



Net Income



Volume



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INCOME (Annual)

	2011	2012	2013	Variation
Sales Revenue	97.157.118,00 €	101.947.096,00 €	104.681.539,00 €	3%
Ebitda	9.484.426,00 €	4.532.995,00 €	5.710.732,00 €	26%
Ebitda Margin	10%	4%	5%	
Net Income	442.287,00 €	-2.928.260,00 €	-4.585.404,00 €	-57%
Net Margin	0,5%	n.a.	n.a.	

Performance Information	2011	2012	2013	*2014
ROE	1,70%	N.A.	N.A.	N.A.
ROA	3,45%	N.A.	N.A.	N.A.
Equity Market Value / Sales**	0,30	0,31	0,22	0,21
Equity Market Value / EBITDA	3,03	7,03	4,03	3,87
EPS	0,03 €	N.A.	N.A.	N.A.
PER	64,97	N.A.	N.A.	N.A.
Return Rate	1,54%	N.A.	N.A.	N.A.
Nº of Shares	17.416.400	17.416.400	17.416.400	17.416.400
Price as at 12-31	1,65	1,83	1,32	N.A.
Price				1,27

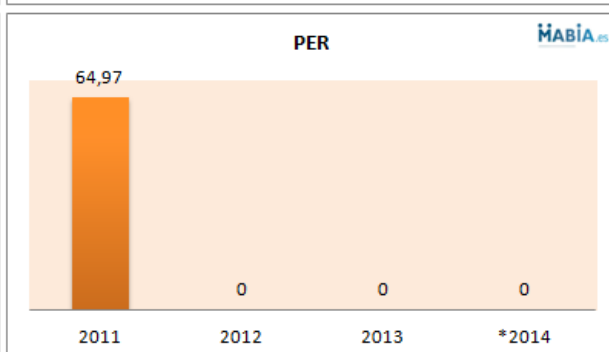
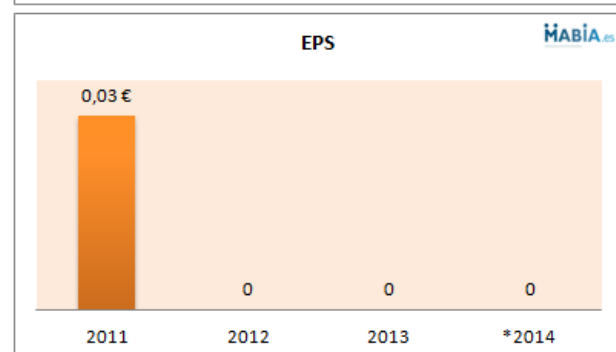
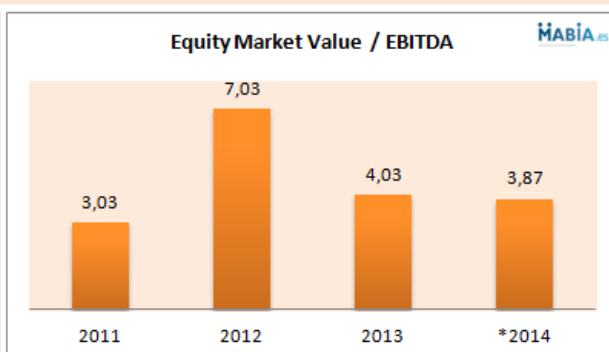
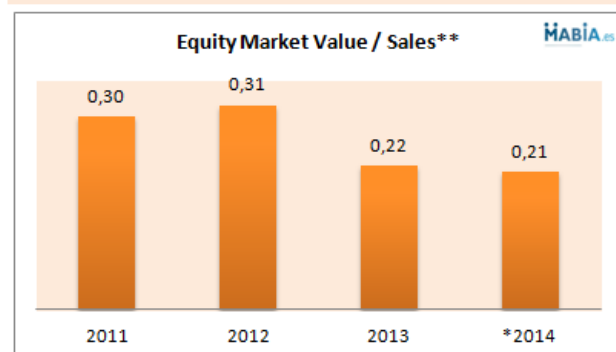
*2014 data is price / last public Financial Statements.

**Sales Revenue



There is no forecast from the Company

	2014E	2015E	2016E
Equity Market Value / Sales**	N.A.	N.A.	N.A.
Equity Market Value / EBITDA	N.A.	N.A.	N.A.
EPS	N.A.	N.A.	N.A.
PER	N.A.	N.A.	N.A.



Debt Analysis	2011	2012	2013
Total debt/Ebitda	4,10	10,77	8,82
Ebitda/Finance Costs	6,24	2,53	1,96
Total debt/Equity	1,49	2,13	3,11