

Revenues for first 9 months of 2013: €117.6 million (+12.3%)

In millions of Euros - IFRS	2012	2013	Change	Like-for-like change at constant exchange rates*
1 st quarter	34.1	34.2	+ 0.4 %	- 0.8 %
2 nd quarter	36.2	43.6	+ 20.3 %	+ 4.4 %
3 rd quarter	34.4	39.7	+ 15.6 %	- 0.1 %
Total 9 months	104.7	117.6	+ 12.3 %	+ 1.2 %

Rounded, unaudited figures

* Integrates CapitalStream business from 22 March 2013

Neuilly-sur-Seine, 6 November 2013: Linedata (LIN:FP), the global solutions provider dedicated to the investment management and credit finance industries, posted revenues of €117.6 million for the period ending 30 September 2013, a 12.3% increase compared to 2012 thanks notably to a significant boost in revenues generated by perpetual licenses (+€4 million) and consulting services (+€6 million). At constant exchange rates and on a like-for-like basis, revenues rose by 1.2%.

In the third quarter of 2013, the Group achieved revenues of €39.7 million, a 15.6% increase compared to the third quarter of 2012. On a like-for-like basis at constant exchange rates, revenues for the quarter held steady.

Recurring revenues in the period ending September were up by €2.5 million, rising from €79.1 million in 2012 to €81.7 million in 2013, accounting for 69% of Group revenue compared to 76% in 2012. The decrease in the proportion of recurring revenues to total revenues is due to CapitalStream's impact on revenues in 2013. This entity, acquired in March 2013, has a business model more oriented towards perpetual licenses and large implementation projects.

Bookings (excluding CapitalStream) amounted to €36.8 million in the first nine months of 2013, which represents a 15% increase compared to the same period in 2012.

Performance analysis by region:

In millions of Euros - IFRS	9 months 2012	9 months 2013	Change	Like-for-like change at constant exchange rates*
Southern Europe	50.7	52.2	+3.0%	+3.0%
Northern Europe	21.0	19.7	-6.1%	-2.4%
North America	30.5	43.2	+41.6%	+1.0%
Asia	2.5	2.4	-3.8%	-1.2%
Total	104.7	117.6	+12.3%	+1.2%

Rounded, unaudited figures

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Performance analysis by region:

SOUTHERN EUROPE (Q1: €16.6 million, -2.5%; Q2: €20.0 million, +10.3%; Q3: €15.6 million, +0.5%)

Revenues in the third quarter of 2013 remained stable. Revenues in the first nine months of 2013 were up by 3.0% compared to the same period in 2012.

Revenues from the Credit & Finance segments, which account for a little over half of this region's total revenues, were up by 12.4% thanks to a number of deals signed with existing clients.

Savings and Insurance performed less well with, in particular, a significant reduction in the scope of engagement of a major insurance customer using Linedata Master I.

NORTHERN EUROPE (Q1: €6.5 million, +0.9%; Q2: €6.5 million, -9.3%; Q3: €6.7 million, -9.2%)

The downturn in the United Kingdom in the third quarter is due in particular to a drop in monthly licenses and maintenance agreements as a result of certain Hedge Funds customer agreements not being renewed at term. The region experienced a decline in revenue of -9.2% compared to the third quarter of 2012, or a decline of -3.6% on a like-for-like basis at constant exchange rates, the unfavourable Sterling to Euro exchange rate having had a significant impact.

NORTH AMERICA (Q1: €10.4 million, +5.4%; Q2: €16.2 million, +61.6%; Q3: €16.6 million, +56.4%)

In the third quarter of 2013, the North American region posted a 56.4% increase in revenues compared to the third quarter of 2012, thanks to a good performance of the Front Office business and CapitalStream's €6.4 million contribution to revenues.

At constant exchange rates and like-for-like scope of business, revenues for the first nine months of 2013 increased by 1.0%. Changes in the exchange rate had an impact of - €0.8 million.

ASIA (Q1: €0.8 million, -1.4%; Q2: €0.8 million, -4.0%; Q3: €0.8 million, -5.8%)

In Asia, revenues have remained steady at around €0.8 million per quarter since the start of the year, hampered by the unfavourable exchange rate and continuous pressure on sales prices.

Outlook

With the integration of CapitalStream, the Group is pursuing a strategy of penetrating new markets thanks to the front-to-back complementarity of its products and the expanded geographical coverage of the combined Credit and Finance business.

In the Asset Management segment, new versions of products recently or soon to be released will allow Linedata to offer both its existing and new customers truly innovative solutions that are adapted to the regulatory environments of these markets.

Next communication: publication of the annual revenues for 2013, on 6 February 2014 after close of trading.

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ABOUT LINEDATA

Linedata is a global solutions provider dedicated to the investment management and credit community, with close to 1000 employees in 16 offices across the globe. Linedata has been at the service of the financial industry from day one, and applies its market and client insight to provide innovative and flexible mission-critical software and services that help its clients grow in over 50 countries. Headquartered in France, Linedata achieved revenues of EUR 144 million in 2012. This company is listed on Euronext Paris FR0004156297-LIN - Reuters LDSV.LN - Bloomberg LIN:FP.

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