

MELLOLONDON

INVEST IN GOOD COMPANY



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Welcome from David

Welcome and thank you for supporting Mello. This is our second in-person event of 2022 and whilst now far less concerned about the pandemic affecting our investment decisions and the Mello investment community it appears the economy and macroeconomic challenges are hovering constantly around us. In many ways that means we all need to be strong and support each other through this tough climate so we are very pleased to have the Mello community back networking together here in the Clayton which has become a familiar and very practical venue. Although our MelloMonday webinars continue to help facilitate investor and management relationships, I am sure investors will once again enjoy having in depth and meaningful face-to-face interactions with the wide variety of companies attending MelloLondon.

At Mello we offer many forms of engagement, but our view is that management need to meet investors at least once a year and to build trust and loyalty that only a handshake and personal engagement can achieve. Therefore, these physical events for smaller and growth companies are vitally important and we hope management, PR teams and brokers will continue to support us. Events around the world have led to much uncertainty but have also created opportunities for investors and this could be the right time to do further research. As a smaller company investor, which most of our Mello community have in common, it has been a tough market to invest in over the last couple of years but one feels there will be light at the end of the tunnel

as markets tend to look a year ahead so even 2024 will soon be on the horizon.

At this event we have brought together over 35 companies that are positive about their future and wanting to meet investors. Do try and spend time with as many as possible and learn something about new sectors and products that you would otherwise not get the opportunity to do so. The Mello team have added new sessions and there are educational panels for you to enjoy over the two days, including the grand finale on Thursday which is the Mello BASH (Buy, Avoid, Sell & Hold) and definitely not one to miss with at least five companies independently reviewed and analysed. On our first evening tonight, you can look forward to being entertained with the Stockslam and 12 investor volunteer presenters putting forward the investment case for their favourite companies

As ever, a huge thank you our army of helpers, associates and room monitors who help to keep the whole event running smoothly. Finally, but certainly by no means least, I think that I am so fortunate to have such a fabulous events team – Georgina, Anne & Gracia all working tirelessly behind the scenes to get every show whether virtual or physical out to our investors and I am proud of what we achieve on behalf of our Mello community.

Best wishes David Stredder

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SPEAKERS & PANELISTS



Andrew Hollingworth

Holland Advisors
(London) Ltd

Andrew is the founder of Holland Advisors and Portfolio Manager of the VT Holland Advisors Equity fund. The VT Holland Advisors Equity Fund, launched on 21st June 2021, has been converted from the Farnam Street Capital Fund which had been in existence since 2011. Andrew and Holland Advisors provide investment advisory services to some of the world's largest Investment management houses. Andrew set up Holland Advisors in 2009 after a 20 year career in stock broking and fund management. He has had a passion for value and franchise investing for many years. When he is not in the office, Andrew can be found reading anything written by great investors or business managers, swinging a golf club or trying to keep up with his wife and teenage boys on a ski slope.



Andrew Latto

CFA

Andrew Latto, CFA, founded FundHunter with the objective of providing unbiased fund analysis and views. Andrew previously worked at an equity research house and a fund manager and follows the quality investing approach. He aims to use this background in equity research to "look under the hood" and consider the stocks that funds hold. Fund Hunter's overall approach is to identify funds that own stock compounders. These are companies that are able to increase free cash flow per share over the medium to long term. Fund Hunter's model portfolio of funds has meaningfully outperformed the FTSE All-Share Index since inception at the start of 2019.



Andy Brough

Head of the Pan
European Small
and Mid Cap,
Schroders

Andy Brough is the Head of the Pan European Small and Mid Cap team at Schroders, responsible for managing the Schroder UK Mid 250 Fund since its launch in 1999, the Schroder UK Mid Cap investment trust since 2003 and Schroders UK Smaller Companies funds since 1994. He became sole head of the team in 2016, having co-led since 2002. He joined Schroders in 1987 as a fund manager for a range of UK mid and small cap retail and institutional portfolios. Qualifications: Chartered Accountant; BSc in Economics from Manchester University.



Mark Simpson

Mark Simpson has been investing in individual stocks since 2003. Over the last decade Mark has generated a 19% compound annual return following a Value methodology vs a FTSE All-Share Total Return Index that has returned less than 8% over the same period. He has achieved this out-performance by developing a strategy that plays to his unique strengths and overcomes his weaknesses, in particular finding practical ways to overcome behavioural biases. His book Excellent Investing describes this approach and how investors of all types can generate higher and more consistent returns by developing their own strategy that plays to their strengths and overcomes their weaknesses.



Ed Croft

CEO & founder of
Stockopedia.com

Edward Page Croft, CFA, is the CEO & founder of Stockopedia.com - the award-winning stock selection & portfolio analysis platform for individual investors. Ed has a background in asset management, having managed ultra high net wealth private client accounts at Goldman Sachs and a family office. Ed is a committed educator and regular keynote speaker at investment conferences focusing on the benefits of systematic investing in countering common behavioural biases.



Gervais Williams

Head of Equities,
Premier Miton
Investors

Fund Manager: The Diverse Income Trust plc, Miton UK MicroCap Trust plc, Premier Miton UK Multi Cap Income Fund, Premier Miton UK Smaller Companies Fund

Gervais Williams joined Premier Miton in March 2011. He is Head of Equities and manages a number of funds and trusts. His fund management career extends over 30 years including 17 years at Gartmore Group Ltd, where he was head of UK Small Companies investing in UK smaller companies and Irish equities. Gervais is a member of the AIM Advisory Council, and a board member of the Quoted Companies Alliance. He was a member of the Patient Capital Review panel with the Chancellor of the Exchequer where the recommendations were put into legislation in the subsequent budget. Gervais has published three books, 'Slow Finance' in the autumn of 2011 (Bloomsbury), 'The Future is Small' was published in November 2014 (Harriman House) and 'The Retreat of Globalisation' published in December 2016 (Harriman House).



Glen Goodman

Writer/Presenter of the Investing Basics video series

Glen Goodman is the writer/presenter of the Investing Basics video series, launched in October 2022 at the London Stock Exchange by ShareSoc – the UK Individual Shareholders’ Society.

Glen has been a successful trader of stocks, commodities, forex and bonds for more than 20 years. He famously turned £3000 into £100,000 by betting there would be a stock market crash in 2008. The Times called it his Little Short, (a nod to the book/movie The Big Short.)

His Facebook page, Glen Goodman – The Shares Guy, has almost a quarter of a million followers. It focuses on teaching people how to trade and invest sensibly. Glen is also the bestselling author of The Crypto Trader, published in 2019 by Harriman House. He draws on his years of trading experience to show how anyone can trade cryptocurrency successfully. He is a cryptocurrency contributing expert for the London School of Economics and a regular conference speaker. Glen was formerly a Business Correspondent for BBC News and ITV News, interviewing leading politicians, including Boris Johnson, David Cameron and Theresa May. He is regularly interviewed about investment topics by BBC TV & Radio, Bloomberg TV, Reuters TV, Al Jazeera, LBC, The Guardian, The Independent, The Telegraph, Forbes, and Newsweek, among others.



Graham Neary

CFA

Graham Neary, CFA is co-writer of the Small Cap Value Report on Stockopedia, with Paul Scott. Recently, he has also started broadcasting a daily investment show on YouTube.

He has been active in the financial markets for about fifteen years as an analyst, institutional fund manager and public commentator.



James Smith

Fund Manager, Premier Miton Global Renewables Trust plc

James Smith joined Premier Miton in June 2012. James joined Premier Miton from Utilico, where he spent 14 years specialising in the global utilities, transportation infrastructure and renewable energy sectors. James is a Chartered Accountant and Barrister.



Katie Potts

Herald Investment Management Ltd

Katie Potts is the Founder, Managing Director and the lead fund manager for Herald Investment Management Ltd. Herald Investment Trust invests in global quoted TMT stocks with a market value below \$3bn.



Lord Lee

Trafford DL FCA

John Lee is regarded as one of the UK’s leading private investors having bought his first shares sixty years ago. He was one of the earliest to recognise the long-term potential of PEPs, the forerunner of ISAs when they were launched in 1987 and was judged to be the first ISA “millionaire” in 2003. He has written over 250 articles for FT Money and has given numerous lectures and interviews on his investment philosophy as a long-term “value” investor. In 2014 Pearsons published his well-received How to Make a Million – Slowly: my guiding principles from a lifetime of successful investing. He is a Chartered Accountant with a wide experience of investment banking and business and is Patron of ShareSoc, the leading body lobbying and campaigning on behalf of private investors. From 1979-92 he was a Member of Parliament, during this period he was both a Defence and Tourism Minister. A former High Sheriff of Greater Manchester, he sits as a member of the House of Lords as Lord Lee of Trafford and lives in Richmond, Surrey. In 2019 he published Yummi Yoghurt: A First Taste of Stock Market Investment! which is aimed at teenager/ novice investors.



Michael Taylor

Michael Taylor is a full-time UK trader of his own private capital since December 2016. He is willing to take a contrarian view and go against prevailing sentiment, relying on price action analysis to generate alpha. Michael has a rules based system trading both directions which draws heavily on technical analysis and some use of Level 2. Being net short in February and March 2020 delivered positive returns as global equities slid across the board due to the coronavirus (Covid-19) crisis. This method was described in detail in his free short selling guide. Risk management is the most important factor for him as capital drawdowns work against traders exponentially. Michael runs technical filters that allow me to focus find strong names without listening to the noise, and he shares these concepts in his email subscription and in his writing.

SPEAKERS & PANELISTS



Stephen Clapham

Behind the Balance Sheet

Stephen Clapham of investment research and training consultancy Behind the Balance Sheet will be here again with another instalment of his accounting red flags and investing tips series. In accounting red flags he will talk about comparing operating cash flow to earnings, and give some tips on adjustments to ensure you are comparing like with like. In the investing tips series, he will explain why supply is often a much better indicator to use than demand when evaluating the outlook for industry pricing. Steve has launched a free weekly investing newsletter. You can sign up on behindthebalancesheet.com.



Paul Hill

Vox Markets

Paul is a professional investor, capital markets commentator & equity analyst with more than 30 years experience.



Richard Bernstein

Founder and CIO, Crystal Amber Fund

Richard Bernstein is founder of and Chief Investment Officer at Crystal Amber Fund, the London Stock Exchange listed activist fund. In the last 12 months, the Fund has achieved a 5% increase in net asset value whilst the UK Mid Cap Index has fallen by 39%.

Richard has written for national newspapers on financial accounting and disclosure.

Richard has pioneered corporate share gifting: Crystal Amber and his previous listed technology fund, Eurovestech, have created and gifted several million pounds of shares to charity.

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MELLO LONDON EXHIBITORS

 <p>AdEPT Technology Group PLC</p>	 <p>Artisanal Spirits Company</p>	 <p>Belvoir</p>	 <p>Bango</p>
 <p>Behind the Balance Sheet</p>	 <p>Billington</p>	 <p>ECSC</p>	 <p>Eight Capital Partners PLC</p>
 <p>Hydrogen Utopia</p>	 <p>i(x) Net Zero</p>	 <p>i3 Energy</p>	 <p>Just Collecting</p>
 <p>Poolbeg Pharma</p>	 <p>Premier Miton</p>	 <p>Progressive Equity Research</p>	 <p>Proportunities</p>
 <p>Rainbow Rare Earth</p>	 <p>React PLC</p>	 <p>SDI Group PLC</p>	 <p>Skillcast</p>
 <p>SmartSpace</p>	 <p>Springfield Group</p>	 <p>SulNOx Group</p>	 <p>ThruVision</p>
 <p>Time Finance</p>	 <p>Tracsis</p>	 <p>Van Elle</p>	 <p>VFS Legal</p>
 <p>VectorVest</p>	 <p>Zamaz PLC</p>	 <p>Zoo Digital</p>	 <p>ATOME Energy</p>
 <p>Evo</p>	 <p>Inspiration Healthcare</p>		

COMPANY PROFILES



AdEPT Technology Group PLC

Established in 2003, AdEPT are an award-winning managed services and telecommunications provider with a mission of 'uniting technology, inspiring people'. AdEPT offer proven and uncomplicated technology solutions to over 12,000 customers across the UK, including schools, hospitals, local and central government, and businesses of all shapes and sizes.

In a world where there is simply too much technology to choose from, AdEPT uses expertise and strategic partnerships with the likes of the likes of Sage, Microsoft, BT, Fortinet, Cato, LG Ericsson and Avaya to ensure customers get the right solution to their individual requirements, not just an off the shelf option. By specialising in converging IT, unified communications and connectivity into an all-encompassing solution, AdEPT allows its customers to focus on what matters – running their organisation, rather than weathering technical concerns or obstacles.

With a staff of over 300, AdEPT has the depth and breadth of expertise to deliver, whilst still being able to care for its individual customers, which proudly include the TUC, Norwegian Cruise Line, Unicef, Royal Borough of Greenwich, the London Grid for Learning, Public Health England and Kent NHS to name a few. To discuss your technology wants and desires with someone who will genuinely work to help, please don't hesitate to get in touch – enquiries@adept.co.uk



Artisanal Spirits Company

The Artisanal Spirits Company (ASC) are curators of the world's favourite, single-cask and limited-edition whisky.

Based in Edinburgh, ASC owns The Scotch Malt Whisky Society (SMWS) which was established in 1983 and currently has a growing worldwide membership of just over 36,000 paying members.

SMWS provides members with inspiring experiences, content and exclusive access to a vast and unique range of outstanding single cask Scotch malt whiskies and other craft spirits, sourced from over 100 distilleries in 20 countries and expertly curated with diligence and care.

Since producing the Society's very first cask, we have created around 10,000 different whisky releases, producing a constant flow of unique and exciting one-of-a-kind whiskies.

With proven e-commerce reach and new brands like J.G. Thomson, ASC is building a portfolio of small-batch spirits brands for a global movement of discerning consumers - delivering c.£20 million in annual revenues with over 80% of revenue generated online and over 65% from outside the UK, with a growing presence in the key global whisky markets including UK, China, USA and Europe.

ASC has a pioneering business model, a substantial and growing addressable market presenting a long-term global growth opportunity and a strong and resilient business, primed to deliver growth.



Bango

The world's largest online merchants, including Amazon, Google and Microsoft, use Bango technology to acquire more paying users. Bango has developed unique purchase behavior technology that enables millions more users to buy products and services, using innovative payment methods including carrier billing, digital wallets and subscription bundling. Bango harnesses this purchase activity into valuable marketing segments, called Bango Audiences. Merchants use these audiences to target their marketing at paying customers based on their purchase behavior. Better targeting increases spend through the Bango Payments business, in turn, generating more data insights, creating a powerful virtuous circle that drives continuous growth.



Belvoir Group PLC

Opening the door to property, mortgage and franchise expertise Founded in 1995 and listed in 2012, Belvoir Group (BLV:AIM) is a leading UK property, franchise and financial services group operating through two divisions: a network of property franchisees and a network of mortgage advisers, combining to support customers throughout their property journey.

The Group's multi-brand strategy, launched in 2015, has driven growth to a network of 373 franchised estate and lettings agency offices across six brands, managing 73,300 properties. The diversification into financial services through the acquisition of Brook Financial Services in 2017 introduced mortgage expertise to the Group which now operates through 301 advisers under the Mortgage Advice Bureau brand.

At franchisee level, Belvoir continues to drive consolidation within the UK property sector through its assisted acquisitions programme, which proactively identifies suitable bolt-on lettings businesses for its franchisees to acquire, while providing optional funding and support. The programme has undertaken over 120 assisted acquisitions since 2014 seeing many of our franchisees double the size of their business overnight.

The Group benefits from a strong lettings base with 60% of gross profit derived from lettings, which surety of revenue and ongoing financial stability in a cyclical property market. Furthermore, our substantial financial services client bank provides a source for remortgage and other insurance revenue-generating opportunities.

Thanks to the diversified revenue stream, the Group has continued to outperform the markets in which it operates. In 2021 it reported revenue of £29.6m, retained earnings of £7.4m marking 25 years' of uninterrupted profit growth, and a dividend of 8.5p for the year, representing a healthy yield of 3.5%.

Belvoir's proven track record in delivering growth is built around a business model of supporting networks of entrepreneurial business owners. This is underpinned by a significant bias towards lettings, providing a recurring revenue stream, and sound business ethics. The Group's capital allocation policy provides a reliable and growing dividend and therefore an attractive yield for investors, whilst retaining funding for the group's growth strategy.



Behind the Balance Sheet

Steve Clapham is the founder of Behind the Balance Sheet (<https://behindthebalancesheet.com/>), the premier investment training consultancy. The company runs Forensic Accounting Courses for leading institutions like Schroders, Hermes and Baillie Gifford – since its first course in June 2018, over 150 investment professionals have been through the programme. More recently, courses have been made available to private investors, both in-person at its City training academy and online (<https://courses.behindthebalancesheet.com/>).

After launching a programme for a leading wealth manager delivered in person, online and via webinar, in 2020 the company will launch an in-depth course for private investors. Titled “Want to become an Analyst?”, the programme will last one year, and will take retail investors from the basics to a level where they have a real understanding of company accounts and analysis.



ECSC Group PLC

Founded in 2000, ECSC Group plc is the UK’s longest running ‘full-service’ cyber security service provider. ECSC provides expert security breach prevention, detection and response support to organisations across all sectors.

ECSC operates from two Security Operations Centres (SOCs): one in Yorkshire, UK, and the other in Brisbane, Australia. ECSC MDR Division offers flexible 24/7/365 cyber security managed detection, and response support to its clients. The Assurance Division provides guidance, certification to industry standards, and extensive testing services to allow organisations to improve, and demonstrate, their cyber security effectiveness.

The Company’s broad client base ranges from e-commerce start-ups to global blue-chip organisations, including 10% of the FTSE 100. For more information please visit the following: <https://investor.ecsc.co.uk/>



Eight Capital Partners PLC

Eight Capital Partners plc (AQSE: ECP) is a financial services operating company that aims to grow revenue through sourcing, investing in and delivering tech, fintech and other on-trend-sector transaction in businesses engaged in “Fintech” operations, from the digitisation of banking services, through to blockchain-backed disruptive finance companies.



Billington Holdings PLC

Billington Holdings Plc are a UK-based leading structural steel and construction safety solutions specialist. The Billington Group consists of:

Billington Structures is one of the UK’s leading structural steel contractors. They are nationally recognised and multi award-winning, with 75 years’ experience in the industry. The team are experienced in projects from simple building frames to the most complex structures in excess of 15,000 tonnes and have the capability to process over 40,000 tonnes of steel per annum.

Shafton Steel Services are one of the best equipped steel service centres in the UK. Based in South Yorkshire, they offer a wide range of steel products, manufactured in a large state of the art, independent steel services and processing centre.

Easi-Edge supplies innovative and effective temporary edge protection barriers and associated safety solutions. They have the expertise and experience to deliver the highest quality safety measures for the construction industry.

Peter Marshall Steel Stairs are experts in steel stair design, fabrication and installation. They are a specialist company principally engaged in the design, fabrication and installation of highly engineered steelwork, staircases and balustrade systems.

Hoard-it is leading the way in reusable hoarding solutions. They design, fabricate, manage, hire and sell environmentally sustainable, reusable hoarding and fencing systems. Their patented on-ground Hoard-it system is designed by chartered structural engineers and has been independently tested.

Specialist Protective Coatings specialise in surface preparation and the application of protective coatings across all sectors including rail, highways, defence, petrochemical, energy, structural steel, and infrastructure.

The Group reported revenue for the six months to 30 June 2022 of £46.2 million and profit before tax of £1.3 million, with continued recovery following Covid-19 related disruption to the market. The Group has secured a significant volume of new work in recent months. In particular, contracts have been secured in the data centre, energy from waste and industrial warehousing sectors at improved margins.



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COMPANY PROFILES

HYDROGEN UTOPIA

Hydrogen Utopia International PLC

Hydrogen Utopia International PLC (“HUI”) is pioneering the use of technology using non-recyclable waste plastic to produce hydrogen and other alternative energy sources which are not dependent upon the use of coal, gas, oil or fossil fuel derived electricity. HUI’s plants will not only provide alternative energy but will also address the major environmental threat posed by waste plastic.

HUI’s primary mission is to accelerate the development of a circular and net zero carbon economy in Europe.

An HUI plant will process mixed waste plastic that has been rejected from the recycling stream and which would otherwise be destined for incineration or landfill to produce a synthetic gas (“syngas”) that is very similar to natural gas. Hydrogen can then be extracted from that syngas, the syngas can be used as a fuel in its own right or as a gas engine fuel to produce electrical power. Heat produced as a by-product of the production process can be sold and fed into district heating systems, for example, which in Eastern Europe are used extensively.

Despite global attempts to limit plastic production and to increase the level of plastic recycling, it appears impossible, impractical or uneconomic to recycle about 90% of plastics. In January 2021 the EU banned the shipment of non-recyclable mixed waste plastic to countries outside the OECD and tightened controls on exports to OECD countries and within Europe.

During the Covid-19 pandemic, the EU unleashed the largest funding package in its history: EUR 1.7 trillion which is currently being allocated to regions across the Continent most impacted by the transition from fossil fuels to alternative energy sources. As a consequence of the war in Ukraine, sanctions against Russia and an increasing reluctance to place any significant dependence upon Russian gas and oil supplies, Western, Central and Eastern European countries are moving even faster to seek alternative sources of energy. HUI plants could be significant in allowing local communities across Europe to improve the effects upon them of this energy supply crisis.

HUI is creating a substantial project pipeline across the Continent, particularly where coal mining has to be phased out, where unemployment is very high and where there is an urgent need to create new employment opportunities to preserve local communities.

Proportunities

Proportunities

Proportunities is a predominantly on-line platform, designed for those interested in residential property development & investment. Built by property professionals with many years of experience, proportunities sources and promotes both development and investment opportunities for its members, bringing together a collection of services to provide an extensive resource pool. The free membership model also provides access to helpful guides, sector news and case studies, along with premium services providing consultancy, project sourcing & management and investment opportunities.



i3 ENERGY

i3 Energy

i3 is a London (AIM:i3E) and Toronto (TSX:iTE) listed energy company with a diverse, full-cycle portfolio of assets in the Western Canadian Sedimentary Basin (WCSB) and UK North Sea (UKNS).

i3 has 2P reserves in Canada of approximately 154 MMboe and produces over 22,000 boepd from large contiguous holdings in some of the WCSB’s most economic play types, with material upside deliverable through the Company’s sizeable, operated positions at Simonette (Montney) and Marten Hills (Clearwater). i3 produces from over 700 net long-life, low-risk and low-decline wells, spanning over 625,000 net acres, providing steady income that can be distributed to shareholders, used to fund the development of its prolific inventory, or to pursue farm-in and M&A opportunities.

In the UKNS, i3 owns and operates block 13/23c which encapsulates the company’s 2019 Serenity oil discovery and also the highly-prospective Minos High area. The company’s North Sea strategy focuses on the development of existing discoveries that are located proximal to existing infrastructure in order to minimise development capital and maximise economic recovery.

i3 is committed to returning value to shareholders through the deployment of its growth model, by way of growth-related share price appreciation, monthly dividend distributions, and opportunistic share buybacks.

just collecting

Just Collecting

Our mission is simple: To help you profit from buying and selling rare collectibles

Expertise: Our team of experts has a combined 250 years’ experience in the collectibles sector. Our founder, Paul Fraser, has been investing in collectibles since 1977

Extraordinary items: We have the world’s largest private stockholding of investment-grade collectibles. We deal in fully authenticated rare manuscripts, autographs, postage stamps, coins, space memorabilia and much more

Our ethos: Investing in collectibles isn’t right for everyone. If it doesn’t fit with your investment goals and financial situation, we will say so

COMPANY PROFILES



i(x) Net Zero PLC

i(x) Net Zero plc is an investing company with a focus on Energy Transition and Sustainability in the Built Environment. Founded in 2015, the company invests in sectors that are critical to solving humanity's most pressing environmental issues. These sectors, i(x) believes, are also the biggest investment opportunities, thus providing its shareholders the opportunity to create long-term capital growth with positive, scalable, measurable and sustainable impact on the environment and the communities it serves. Energy Transition

The world is currently undergoing the transition from the use of fossil fuels as a primary source of power to renewables and alternative sources of energy. All forms of energy currently being used need to be decarbonised and the investment needed to accomplish this will be enormous. i(x) invests in three companies in the energy transition sector:

- WasteFuel, which is developing projects to produce renewable fuels using proven technology for air, land and sea transportation;
- Carbon Engineering, whose Direct Air Capture technology allows to capture carbon dioxide directly out of the atmosphere and sequesters it for commercial and industrial use; and
- Enphys Acquisition, a NYSE-listed SPAC targeting renewable energy businesses in South America.

Sustainability in the Built Environment

In order to reduce the carbon footprint of the real estate and construction industries and achieve zero carbon emissions, industry will need to embrace new technology, environmentally-friendly building materials and disruptive construction systems. i(x) invests in three companies in the built environment:

- MultiGreen Properties, an attainable and sustainable housing platform that specializes in ground-up construction of multifamily housing in the US;
- Sustainable Living Innovations (SLI), a construction technology and product development company producing panelised building to address housing affordability, delivering net zero building at scale; and
- Context Labs, an impact software company whose digital infrastructure technology platform delivers trust and transparency, helping businesses track their carbon emissions.



Thruvision Group

Spun out from the British Government's Rutherford Appleton Labs in 2002, Thruvision Group is an AIM-quoted technology company that develops, manufactures and sells people-security-screening technology. Thruvision has developed a range of exceptional cameras that register minute differences in body heat, and the technology can detect relatively small objects hidden under an individual's clothing. Based in the UK, Thruvision sells its products globally, focusing on three main sectors, Aviation, Customs and Profit Protection, where it is finding significant opportunities to grow its presence, while Mass Transit and Event/Location Entrance protection markets could be developed in future. A key feature of Thruvision's technology is that it operates at a physically distant range of several metres and completely removes the need for physical searches.



Poolbeg Pharma

Poolbeg Pharma is a clinical stage infectious disease pharmaceutical company, with a unique capital light clinical model which aims to develop multiple products faster and more cost effectively than the conventional biotech model. The Company, headquartered in London, is led by a team with a track record of creation and delivery of shareholder value and aspires to become a "one-stop shop" for pharma and biotech seeking mid-stage products to license or acquire.

The Company is targeting the growing infectious disease market. In the wake of the COVID-19 pandemic, infectious disease has become one of the fastest growing pharma markets and is expected to exceed \$250bn by 2025.

With its initial assets from Open Orphan plc, an industry leading infectious disease and human challenge trials business, Poolbeg has access to knowledge, experience, and clinical data from over 20 years of human challenge trials. The Company is using these insights to acquire new assets as well as reposition clinical stage products, reducing spend and risk. Amongst its portfolio of exciting assets, Poolbeg has a small molecule immunomodulator for severe influenza (POLB 001) which has commenced its LPS human challenge trial with initial results expected by year end 2022; a first-in-class, intranasally administered RNA-based immunotherapy for respiratory virus infections (POLB 002); and a vaccine candidate for Melioidosis (POLB 003). The Company is also developing an oral vaccine delivery platform and is progressing two artificial intelligence (AI) programmes to accelerate the power of its human challenge model data and biobank, with results from the first programme expected by year end 2022.

For more information, please go to www.poolbegpharma.com or follow us on Twitter and LinkedIn @PoolbegPharma.



Premier Miton

Premier Miton is a genuinely active investment manager offering a range of funds and investment trusts, as well as a portfolio management service, covering equity, fixed income, multi asset and absolute return investment strategies.

Our clients' investments with us are actively managed by our different specialist investment teams, who are empowered to employ their own proven and distinctive investment approaches with the aim of helping them achieve their long term investment objectives.

We believe it is important that we also act responsibly, including in our approach to investing, our approach to managing the environmental impact of our operations, our approach to the Premier Miton team including diversity and inclusion, wellbeing and personal development, and our approach to our community.



Progressive Equity Research

Progressive Equity Research is a company sponsored research provider, offering freely available and engaging research, and opportunities to hear from a wide range of small and mid-cap UK listed companies. FCA authorised and regulated, with a 15-strong team of experienced analysts and a dedicated investor engagement team, we ensure that the companies we promote are known and understood by the widest spectrum of potential shareholders.

Many small to mid-cap companies don't get the research coverage they need to attract significant investment, particularly in this new regulatory environment. Our analysts, all of whom are sector specialists and have enjoyed successful careers in mainstream investment banks, help companies address this problem by producing top quality, insightful and objective research. In contrast to banks and brokers, there are no restrictions on where our research can be distributed, and it is widely read by institutional asset owners and wealth managers as well as family offices and retail investors in the UK and across Europe. To sign up and receive copies of our research, or to keep informed about our regular investor events, subscribe at www.progressive-research.com.



Rainbow Rare Earth

Rainbow's strategy is to identify near-term, secondary rare earths production opportunities. Meeting escalating demand for critical minerals needed for global decarbonisation, we are focused on producing the magnet rare earth metals neodymium and praseodymium ("NdPr"), dysprosium and terbium. With our strong operating experience, proven project development experience, unique intellectual property and diversified portfolio, Rainbow will develop a responsible rare earths supply chain to drive the green energy transition.

The Phalaborwa Rare Earths Project, located in South Africa, comprises an Inferred Mineral Resource Estimate of 30.7Mt at 0.43% TREO contained within unconsolidated gypsum stacks derived from historic phosphate hard rock mining. High value NdPr oxide represents 29.1% of the total contained rare earth oxides, with economic Dysprosium and Terbium oxide credits enhancing the overall value of the rare earth basket in the stacks. The rare earths are contained in chemical form in the gypsum stacks, which allows high-value separated rare earth oxides to be produced in a single processing plant at site with lower operating costs than a typical rare earth mineral project.



React PLC

REACT is a leader in the specialist cleaning, decontamination, and hygiene sector. Our purpose is to keep our customers' property safe, hygienic and clean, thereby positively reflecting the values of their brand. We do this through regular specialist cleaning and emergency response to potentially harmful incidents.

The core business includes regular deep cleaning regimes in the health and education sectors, on parts of the rail network and the highways; emergency call-out work to respond to trauma, anti-social behaviour, and other hazardous incidents across a range of sectors including working for some of the industry's largest facilities management ("FM") firms.

The recent acquisition of LaddersFree, one of the largest commercial window cleaning businesses in the United Kingdom, compliments the Company's value proposition perfectly, adding strength to the Group's capability to deliver high quality services across the UK where much of its competition is relying on sub-contractors.

Greater than 80% of revenue is contracted and recurring. A strong balance sheet, great customer relationships and growing demand for national coverage positions REACT well to materially improve shareholder value through continued organic growth and selected M&A.



SmartSpace Software PLC

SmartSpace Software plc (AIM: SMRT) is a fast-growing, SaaS-based provider of flexible workspace software including desk, meeting room and visitor management solutions for the SME and mid-market, on a global scale. The Group's complementary cloud-based platforms (SwipedOn and Space Connect) are scalable, enjoy short sales cycles and can be easily self-deployed to create cost effective COVID-safe solutions for flexible workspace environments. Offering a cutting-edge technology stack that includes facial recognition, AI, advanced analytics and UX configuration tools, this means that customers can make real-time intelligent decisions to manage building capacity and social distancing, improve the efficiency of a workspace and support real estate rationalisation strategies.

The three operating companies in the Group comprise:

- Space Connect – SaaS meeting room and desk booking (www.spaceconnect.co)
- SwipedOn – SaaS visitor management, desk booking (www.SwipedOn.com)
- Anders & Kern – distribution and technical support (www.anders-kern.co.uk)

For more information go to: www.smartspaceplc.com.

COMPANY PROFILES



Skillcast

Skillcast is the leading UK B2B “SaaS” (Software as a Service”) provider of content and technology for digital compliance transformation that helps companies in the UK and EU to train their staff and demonstrate compliance with laws, regulations, and standards. Skillcast enables companies to digitise and consolidate their compliance processes, thereby reducing costs, improving their employee experience and help build more ethical, inclusive and resilient workplaces.

For over 20 years, Skillcast has been helping companies engage with their employees to transform their workplace cultures with our e-learning, RegTech tools and compliance management system.

The company has over 1 million plus active users from c. 800 clients, including FTSE 100 and Euronext 100 firms, in a range of business sectors. Skillcast was founded in 2001 by Anthony Miller, Catriona Rasic and Vivek Dodd who remain as executive directors. It has offices in London and Malta with over 100 employees and full-time associates across the EU.

Skillcast provides content and software for e-learning, policy attestations, staff declarations, workplace surveys, compliance, and training registers to transform how companies manage their compliance. It helps companies record, monitor, analyse and evidence an ever-greater range of employee activities that impact their environmental, social, governance, and regulatory (ESGR) obligations

Our pricing is both competitive and transparent, with solutions matched to every business size and need.

The Group has two revenue streams:

1. Subscriptions – recurring revenues from client subscriptions to our in-house built compliance portal that comes with a broad range of tools to help manage compliance and its OTS (Off the Shelf) in-house developed libraries of content comprising 200+ digital courses
2. Professional services – non-recurring revenues from bespoke e-learning development projects for Enterprise clients, translations and customisations of those courses.

Why did Skillcast IPO in December 2021?

- Raise funds to allow for investment in sales, marketing and technology to accelerate growth.
- Provides access to further capital if needed.
- Increase brand awareness.

What are the core Financials?

- Annual revenues c. £10m growing at 15-20% per annum
- 70% of revenues from core SaaS products, ARR key measure (+26% yoy at 30 June 2022)
- Cash in bank and no debt

Why invest in Skillcast ?

- Large, fragmented market
- Resilient / non-discretionary spend
- Pure play, scalable, digital SaaS business model
- Content and technology all developed in house over 20 years
- Strong and growing client base with proven customer service (Platinum Feefo 4.9/5.0)
- Strong financials: revenues meeting expectations, cash in the bank, no debt
- Board strengthened following IPO
- Dividend-paying



SDI Group PLC

SDI Group plc (“SDI”) designs and manufactures scientific and technology products for use in digital imaging and sensing and control applications including life sciences, healthcare, astronomy, manufacturing, precision optics and art conservation.

SDI operates through its company divisions:

Digital imaging: Atik Cameras, Synoptics, Graticules Optics
Sensors and controls: Sentek, Astles Control Systems, Applied Thermal Control, MPB Industries, Chell Instruments, Monmouth Scientific, Uniform Engineering, Safelab Systems, Scientific Vacuum Systems, LTE Scientific.

SDI continues to grow by developing its own technology advancements and by improving its global sales channels, as well as through pursuing strategic, complementary acquisitions.

www.sdigroup.com



Springfield Group

Springfield Properties plc is Scotland’s only quoted housebuilder. Since listing on AIM in October 2017, Springfield has increased turnover by 132.5% from £110.6m to £257.1m and increased adjusted profit before tax by 210.4% from £6.7m to £20.8m. Springfield has also grown its land bank by 34% to 16,652 plots at 31 May 2022, making it the largest landbank in Scotland.

Springfield operates in three markets: private housing (in the main, family housing in popular suburban communities), affordable housing (provided both as part of planning requirements for private housing developments as well as in its own right with affordable housing-only developments) and contract housing (which includes homes for the Private Rented Sector).

The Springfield Group is made up of several well-established and respected brands, with Group growth being augmented by the acquisitions of Dawn Homes, Walker Group, Tulloch Homes and Mactaggart & Mickel Homes. The entire business is underpinned by a strong ethos of building quality, energy efficient homes that are four times more efficient than Victorian equivalents, and looking after customers, employees and the communities in which they operate.

A cornerstone of Springfield’s strategy is its distinctive ‘village’ communities located in Dundee, Perth, Elgin, Stirling and Livingston. Made up of around 1,500 – 3,000 homes, Springfield villages are designed as sustainable new places with everything a community needs to thrive, close to fast-growing cities.

Importantly, the Scottish missive system (for private housing) means that customers are contracted into the purchase much earlier in the build programme, which secures the income stream and monetises work in progress. This complements the high revenue visibility and strong cash flow dynamics of affordable housing.

For more information around the Springfield Group’s dividend, results and outlook, visit: <https://www.springfieldgroup.co.uk/latest/results-reports-presentations>.

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COMPANY PROFILES



SulNOx Group PLC

The Greentech company providing next generation, natural solutions, for immediate progression towards carbon neutrality.

SulNOx Group Plc specialises in providing responsible solutions towards decarbonisation of liquid hydrocarbon fuels. Our patented fuel additives are unique and manufactured with sustainable, biodegradable ingredients; reducing the production of harmful, environmentally damaging greenhouse gas emissions such as NOx (>30%), whilst also reducing deadly Particulate Matter (PMs), including soot and smoke (PM2.5 ↓60+% and PM10 ↓50+%).

How it Works

The amount of emissions produced depends on the quality of combustion. When too little oxygen is available, the result is an inefficient burn producing more carbon monoxide (CO) and carbon particulate matter (PMs). Using SulNOx fuel additives when filling up, increases the amount of oxygen available to the fuel - promoting cleaner combustion and optimal energy output, meaning reduced fuel consumption (typically between 8% and 10%).

Simple to use and immediately effective, SulNOx Group Plc currently has successful products in the global marketplace including our SulNOxEco™ Diesel and Petrol Fuel Conditioners which enhance all diesel, petrol and biofuels by improving the burn profile and reducing emissions whilst saving users money by reducing overall fuel consumption.

What sets SulNOx apart

Traditional fuel additives are often fossil fuel-based formulations from waste refinery products and solvents such as naphthalene or xylene. They work like adding lighter fluid to a fire to make the combustion burn harder and brighter. They are simply adding fossil fuels to the problem of fossil fuels. This is neither a solution for decarbonisation nor does it help reduce the harmful impact that fossil fuel combustion is having on health and the environment; it simply masks the real problem of poorly combusted fuel by adding "cetane points". This cannot be considered a green or sustainable solution.

SulNOx Group Plc has partnered with EcoVadis Gold rated Nouryon BV to produce our Greentech products. SulNOxEco™ Fuel Conditioners are verified by Bureau Veritas to be compatible and comply with all diesel and gasoline type fuels (including EN590, EN16709 Biofuels (B20, B30), EN228 gasoline (E5 and E10)). SulNOxEco™ Fuel Conditioner is the only fuel additive that will not void your engine warranty as it remains fully compliant to recommended fuel requirements as stipulated by engine manufacturers.

Industries currently benefiting from using our products include transport (haulage, buses, coaches, taxis, van fleets etc.), shipping, oil companies, fuel storage and distribution, waste/reclamation, mining, generators, agriculture, and construction.

SulNOx Group Plc is a UK Public Limited Company, formed in 2012, trading on the pan-European Apex segment of the AQSE (Aquis Stock Exchange) growth market.

For more information please contact us through our website at <https://sulnoxgroup.com> or email info@sulnoxgroup.com.



Time Finance

Time Finance is a specialist finance provider lending to small and medium sized businesses across the UK. Its core strategy is to focus on providing the finance that these UK SMEs require to fund their business, whether that's through investing in new systems, technology and equipment, expanding or simply managing cashflow.

Its multi-product proposition comprises of Asset Finance, Invoice Finance, Business Loans and Asset Based Lending solutions, with facilities up to £2.5million available.

Since its launch in 1998, the business has grown to support some 10,000 UK SMEs every year and as of October 2022 has provided over £145million of funding support. Their team of 137 employees operate from four locations across the UK – Bath, Reading, Manchester, and Warrington.



Tracsis PLC

Tracsis plc was founded in January 2004 to commercialise world class research and expertise developed in the field of transport scheduling and software optimisation technologies. Since then the Group has grown rapidly, diversified into related transport technologies, and successfully executed a strategy that has seen it make a total of seventeen acquisitions. Today Tracsis is a leading provider of software, hardware, data analytics/GIS and services for the rail, traffic data and wider transport industries. The Group has c.550 permanent employees serving its growing customer base from offices in the UK, Ireland and the US.

Tracsis' purpose is to empower the world to move freely, safely and sustainably. Our approach focuses on combining leading edge software and hardware knowledge, data capture, analytics and industry expertise to generate insights and fast-to-market products and services. We develop innovative technology-driven solutions that solve complex problems in order to maximise efficiency, reduce cost and risk, improve operational and asset performance, improve safety management and decision-making capabilities, and improve customer experience for clients and customers.

Tracsis' has a blue-chip customer base which includes all major UK transport owning Groups, Network Rail, passenger and freight train operating companies, Transport for London, multiple local authorities, major outdoor music and sporting event organisers, and a wide variety of large engineering and infrastructure companies. In North America our clients include Class 1 rail freight companies, transit operators, shortline railroads and several large rail-served ports and industrials.



Van Elle Holdings

Van Elle Holdings is the UK's largest specialist geotechnical engineering contractor. The Company provides a range of ground engineering techniques and services including - ground investigation, general and specialist piling, rail geotechnical engineering, modular foundations, and ground improvement and stabilisation services.

Van Elle operates through three divisions: General Piling, Specialist Piling and Rail, and Ground Engineering Services; and is focused on three end markets: residential and housing, infrastructure and regional construction - across which the Group has completed more than 20,000 projects over the last 35 years.

General Piling provides a range of larger piling and ground engineering solutions for open-site construction projects. Specialist Piling and Rail provides a range of geotechnical solutions in operationally constrained environments including on-track rail applications. Ground Engineering Services offers a range of ground investigation and geotechnical services and modular foundation solutions such as Smartfoot®. Van Elle has a market-leading reputation and the UK's largest rig fleet of 122 rigs.

Having floated on AIM in 2016 it now has a strong national presence, diversified offering and market-leading brand name.



VFS Legal

VFS is releasing a Loan Note that pays interest monthly at 12% p.a. Trading for over 11 years, VFS is one of the leading UK low value consumer litigation funders. We do not lend money, we just purchase the receivables from a law firm for their costs they incur in running a case with these costs payable by HMG, an Insurer or Financial Institution.

The legal sector continues to evolve and the opportunity is emerging for VFS to accelerate the growth of its portfolio from the current level of £50 million. These loan notes will be used in conjunction with our wholesale funding facilities and enable VFS to maximise the opportunity and build a bigger, more profitable business. These loan notes are available for a limited period only with full details available at our stand.



VectorVest

VectorVest is the only stock analysis and portfolio management system that analyzes, ranks and graphs over 16,500 stocks each day for value, safety and timing and gives a clear buy, sell or hold rating on every stock every day. VectorVest now comes complete with the UK, USA, CA, AU and all of Europe databases.

VectorVest gives you ANSWERS, not just data. What to buy. What to sell. Most importantly, WHEN. Unbiased, independent answers. Investment guidance provided at a glance or through your own analysis.



Zamaz PLC

Zamaz plc is an e-commerce business that originates, acquires or licenses small and medium-sized, digitally native brands, selling category-winning products online on global marketplaces and retail technology platforms. With ever prolific customer and shopper data sources, the rapid development of cloud-based e-commerce e platforms, such as Amazon and Shopify, and a thriving ecosystem of third-party software integrators, the options available to launch and build brands that can be marketed, sold, and shipped online quickly and globally with limited risk have never been more compelling. Global marketplaces, led by Amazon and eBay, provide Zamaz with connection to millions of consumers principally in UK and EU, and have become a first-choice route-to-market for a generation of micro and small and medium-sized enterprise businesses to deploy, market and sell an optimised portfolio of brands, products, packs and prices aligned with active, real-time consumer needs and demands.

The Company will create new, and nurture existing brands that deliver high growth sales through online retail channels, leveraging its combined experience with the objective of becoming one of Europe's main brand aggregators. Zamaz joined the Main Market of the London Stock Exchange (Standard Listing) in September this year and has already completed two acquisitions since Listing



ZOO Digital

ZOO Digital supports major Hollywood studios and streaming services to globalise their content and reach audiences everywhere, by providing world-leading, technology-enabled localisation and media services.

Founded in 2001, ZOO Digital operates from hubs in Los Angeles, London, Dubai, Turkey, South Korea, India and Denmark with a development and production centre in Sheffield, UK.

The Group provides media services through its platforms that include: ZOOsubs, ZOOdubs, ZOOstudio. Its full-service proposition delivers the end-to-end services required to prepare both original and catalogue content for digital distribution; these services include dubbing, subtitling & captioning, metadata creation & localisation, artwork localisation and media processing. Alongside this offering, ZOO also provides its customers with management platforms and strategic solutions to support their own internal globalisation operations.

ZOO is a go-to service partner for media businesses looking to globalise their content across different territories, languages and distribution platforms. Using its innovative technology-enabled approach, ZOO helps its customers to reduce time to market, lower costs and deliver high quality products to their global audiences. The business has frameworks in place with all major Hollywood studios and streaming services. Its customers include Disney, NBCUniversal, HBO and Paramount Global.

ZOO's competitive advantage arises from three interlinking factors – the leading role it has played in the digital transformation of its sector; the world class proprietary platforms that it develops to enable this transformation; and the global supply chain of thousands of freelancers, working collaboratively in ZOO's platforms, which delivers services that scale easily to meet demand. These factors combine to make ZOO uniquely geared to capitalise on new market opportunities in a fast-paced and constantly evolving industry.

COMPANY PROFILES



ATOME

ATOME Energy PLC

ATOME Energy PLC is an AIM listed company, awarded the London Stock Exchange's Green Economy Mark, targeting green hydrogen and ammonia production with over 400-megawatt of projects in Paraguay and Iceland, through its subsidiaries ATOME Paraguay, which is wholly owned, and Green Fuel ehf, in which ATOME Energy holds a 75 per cent interest.

Since its admission to AIM in December 2021 ATOME has signed its first electrolyser purchase order for its hydrogen transport Mobility Division due to start generating revenue in 2023 and signed a large scale 60MW power purchase agreement with ANDE, the state energy company in Paraguay for production of green hydrogen and ammonia targeted to start operations at or around end 2024.

ATOME is in the process of operational planning, sourcing and negotiations with green electricity suppliers, equipment providers and offtake partners, including signed memoranda of understanding and cooperation agreements in place with key parties, to use electricity generated from existing geothermal sources in Iceland and hydroelectric power in Paraguay. All chosen sites are located close to the power and water sources and export facilities to serve significant domestic and then international demand.

The Company has a green-focused Board which is supported by major shareholders including Peter Levine, Trafigura, one of the world's leading commodity and logistics company, and Schroders, a leading fund manager.



EVO

Evo

Evo is a fusion of property professionals, skilled trades and simple technology that transforms the way property management, maintenance and repairs are reported and delivered. Evo's digital platform connects tenants and landlords with skilled tradespeople in a convenient and transparent environment, allowing for issues to be resolved in the shortest possible time frame. This level of convenience allows issues to be raised and dealt with as they happen, ensuring tenants have a good experience, and landlords do not have a long-term build-up of issues or consequential property damage.

There are currently over 10 million rental homes in the UK's £30 billion property management industry, and as people seek greater flexibility, renters are forecast to outnumber owners by 2039.

Evo's technology automates a large part of the communication and administration process related to onboarding tenants, properties and the repair event itself, driving landlords costs down and delivering comprehensive property and portfolio information at the click of a button.

Evo also significantly improves the tenants experience by enabling them to report a problem in under 30 seconds, effortlessly track its progress, schedule the repair job at a convenient time as well as communicate directly with the trades person.

Evo currently works with private landlords, BTR, letting agents, housing associations and local authorities as part of its shared mission to support people's access to decent quality housing.



INSPIRATION
HEALTHCARE GROUP

Inspiration Healthcare

Inspiration Healthcare (AIM: IHC) is a global provider of medical technology for use in critical care & operating theatres with a focus on neonatal care. The Company provides high-quality, innovative products to patients around the world which help to improve patient outcomes, and it actively invests in innovative product opportunities and disruptive technologies.

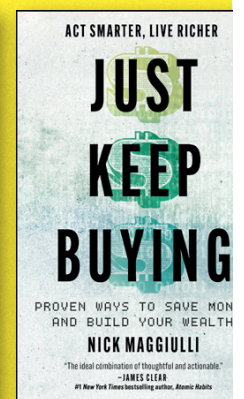
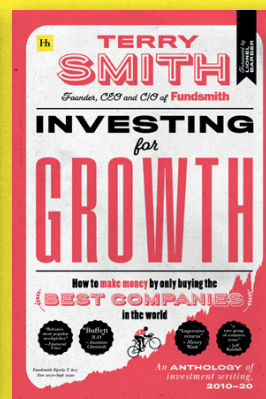
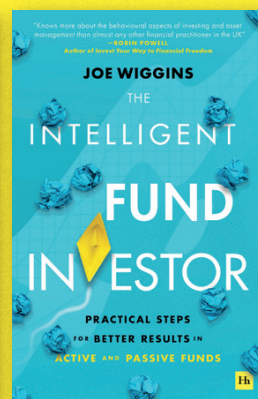
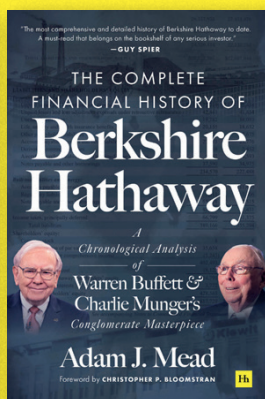
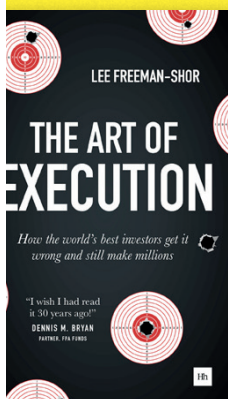
The Group currently consists of three companies: Inspiration Healthcare Ltd, SLE Ltd and Viomedex Ltd and under these brands the Group sells neonatal intensive care and operating theatre equipment around the world through a network of distributors into over 75 countries. Products range from highly sophisticated capital equipment through to single use disposables all of which can help improve outcomes of extremely sick patients.

In the UK and Ireland the Group offers direct sales for most of its products supported by Technical Service offering on site and return to base repair and maintenance along with 24/7 emergency hire of equipment and long term lease arrangements for its own brand products. The Group also acts as a distributor for 3rd party companies that wish to access the UK and the Republic of Ireland's health systems using the Group's sales and service expertise and knowledge of these healthcare providers. The therapy areas in which we distribute products such as Infusion, Respiratory and Developmental Care add value to our product portfolio.

The Group invests in growth through its Research and Development function holding numerous patents on its technology and has strong links with academic Key Opinion Leaders around the world and supports clinical research in the field of neonatal intensive care.

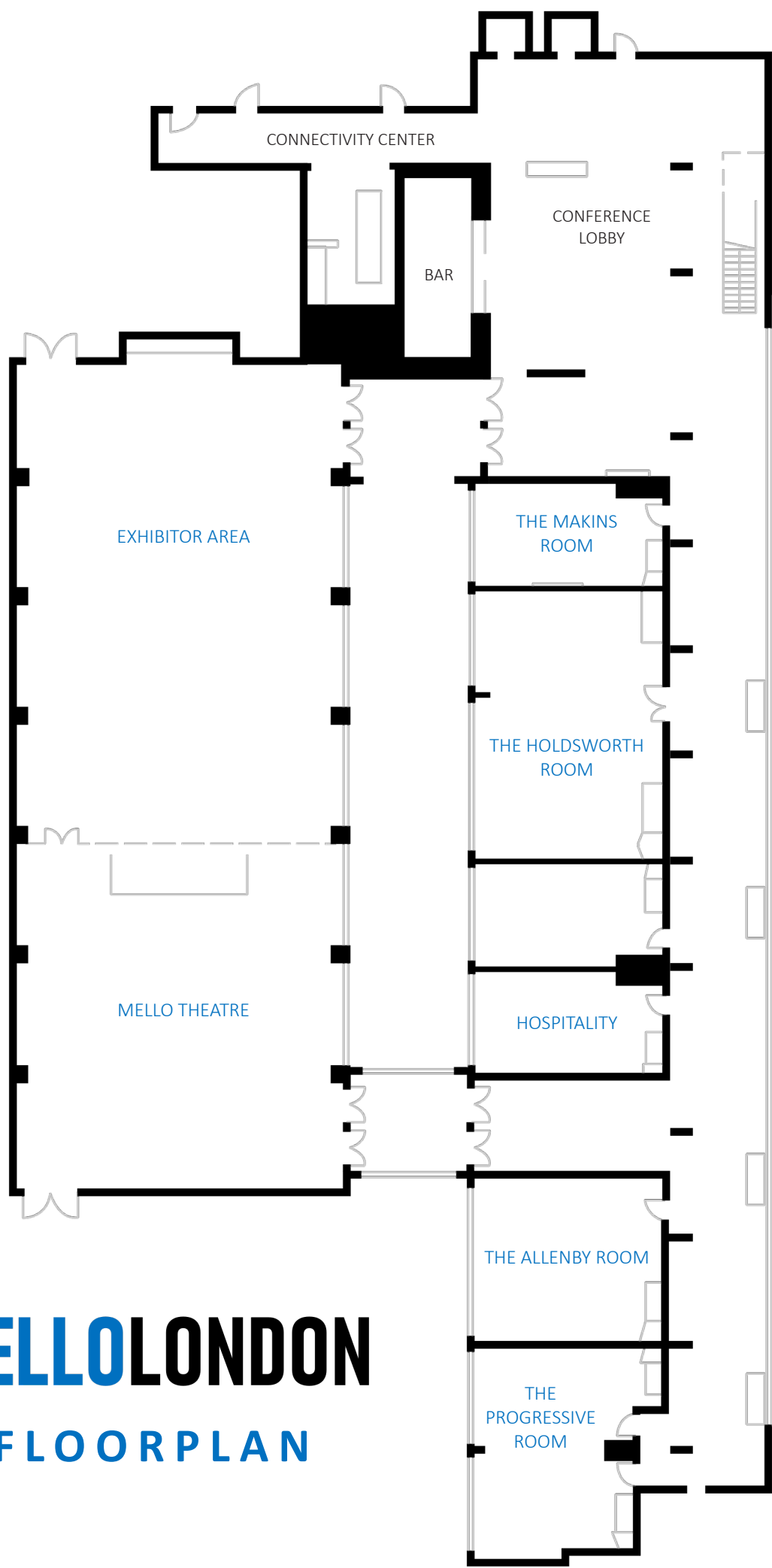
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