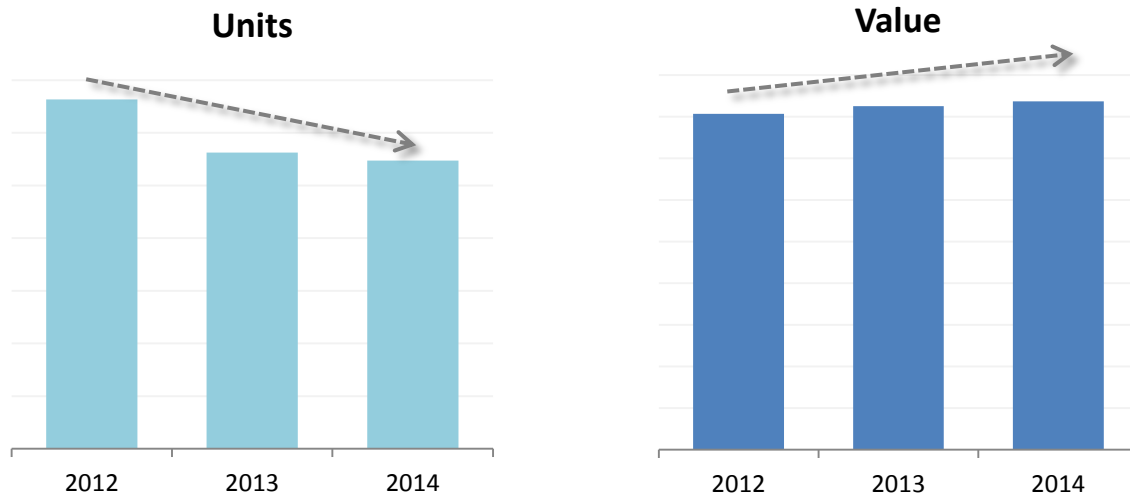


Q1 2014 Toys Overview



Commodity prices in Australia have increased and so did Toys. Over the last 3 years average price of toys have increased steadily and now at \$15.30, leading to value growth yet slower units sale.

Top value drivers

Q1 - 2013

Lego Chima
Teenage Mutant Ninja Turtles
Lego Friends
Spiderman
Lalaloopsy

Of the top 5 key drivers in 2013, only *TMNT* and *Lego Friends* continue to track growth Q1 this year.

TMNT didn't take off till March last year hence tracking solid growth Q1 2014 vs. last year. While *Lego Friends* continue to expand the range, shifting to a more adventure range for girls.

Top value drivers

Q1 - 2014

Peppa Pig
Lego Movie
Lego City
Teenage Mutant Ninja Turtles
Disney Planes

Lego, once again took 2 spots among the top value drivers ranking, *Lego Movie* leading up to the movie release has already been well received and is expected to excel even faster through the rest of the year. There was also a strong focus from Lego on their core range *City* and has seen YOY growth.

Aside from the Lego top drivers, *Peppa Pig* was the top value driver YTD, continued to grow at an accelerated speed and it's now the 2nd largest Infant & Preschool license after *Thomas & Friends*.

Disney Planes was launched in the 2nd half of 2013, first quarter this year is among the top value adding properties.