



# BUILDING A BIG DATA AND MARTECH POWERHOUSE

CSE: CISC, OTCQB: CISCF  
January 2025



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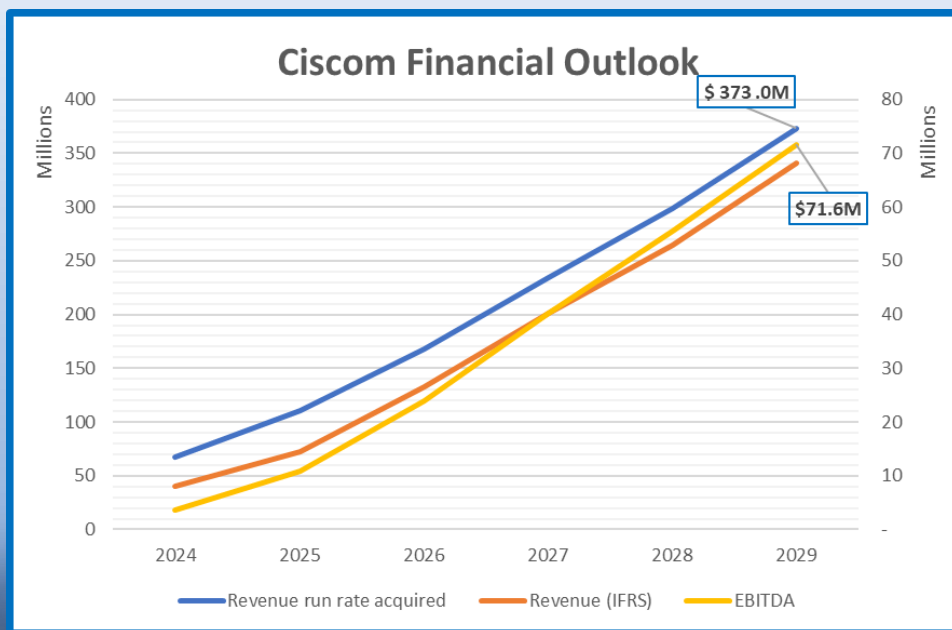


# WHO IS CISCOM

- **Ciscom Corp is “Roll-Up” company**
  - Organic Growth
  - M&A Growth
    - Targeting SMEs seeking transition/succession
- **Publicly Traded on CSE: CISC, OTCQB:CISCF**
- **Closed 2 acquisitions to date**
- **Self-Funded:**
  - Profitable: Positive EBITDA and Net Income (cash-basis)
  - Cash Flow Positive Operations

**Seeking Growth Capital**

# WHERE WE'RE GOING - OUR GROWTH OBJECTIVES



## 2023

- Revenue of \$35.2M (audited)
- Cash-adjusted EBITDA of \$1.8M

## 2024 to 2029

- Averaging 3 acquisitions per year starting in 2025
- Targets averaging \$15M to \$20M in revenue p.a.
- Margin improvement through consolidation and cost synergies
- 2029:
  - Sales of \$341.0M (IFRS)
  - EBITDA of \$71.6M

Please refer to forward looking statements at the end of the presentation

# Ciscom acquires and invests in and manages established businesses in the AdTech and MarTech Sectors

## Our Targets Acquisitions have:

- Sales/revenue of \$5M to \$30M
- Gross profit \$2.5M+
- 4+ years history
- Growth minded
- Profitable
- Cash flow positive
- Capable Second Line Management
- Diversified Clientele



## Ciscom's USP

Entrepreneurs are in need of succession plans

**Ciscom facilitates Succession Plans and Wealth Transfer for with Small and Medium Businesses (SME)**

In Canada, there are over 300,000 Boomer owned businesses, employing under 20 people. Source: Statistics Canada

**\$31 Billion:**

**Estimated Net Worth transfers in the next 10 years** Source: Statistics Canada

# ADTECH & MARTECH SECTOR

The AdTech market is projected to grow from USD \$579.4 billion in 2023 to **USD \$1,496.2 billion** by 2030, at a compound annual growth rate (CAGR) of **14.5%**”

MarketsandMarkets report

“The USA AdTech market size was estimated at USD \$276.3 billion in 2023 and is projected to grow at a CAGR of 11.4% from 2024 to 2030.”

Grand View Research





# OUR SEGMENTS FOCUS

➤ Cisco's areas of focus:

- Big Data Analytics
- AdTech/MarTech
  - Digital/Online/Offline Advertising, Marketing & Communications
  - Social Media
  - Content Management
- Business Intelligence
- Artificial Intelligence (AI) Driven SaaS Platforms
- Application Programming Interface (API)



# OUR SUCCESSFUL AND UNIQUE APPROACH

Ciscom is becoming a significant market force through:

- Mergers & Acquisitions
- Attractive wealth transfers/successions
- Harnessing talent, intelligence and agility of independent entrepreneurs
- Exponentially enhancing individual contributions
- Uniting forces to create an AdTech/MarTech powerhouse with delivery proficiency and big data expertise
- Empowering Investee Businesses





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# CREATING SHAREHOLDER VALUE

**TRANSITION**

**SUCCESS**



# EVOLVING ECONOMIC ENVIRONMENT



## 5 MAJOR REASONS TO INVEST IN SMALLER CAP ISSUERS (SCI) NOW:

- The movement or rotation of investment to SCI is just getting started
- Interest rates are coming down – significantly increasing net profit and cash flows
- SCI have better earnings growth potential
- SCI are undervalued in the market – averaging 23% lower multiples vs larger cap issuers
- Money is flowing back to SCI – more liquidity favors growth

# AdTECH & MARTECH VALUATION MULTIPLES

“... the median EV/Revenue multiple for AdTech companies reaching 2.7x in Q4 2024.”

Source: [Ycharts \(finerva.com\)](https://ycharts.com/finerva.com)

“... In Q4 2023, the median EV/EBITDA multiple for AdTech companies was 14.2x.”

Source: [Ycharts \(finerva.com\)](https://ycharts.com/finerva.com)

Applying these multiples to Ciscom’s 2023 results, market valuation would be:

EV/Revenue (gross profit):	\$18.6M
EV/EBITDA (cash adjusted):	\$19.0M

Adding an acquisition with Revenue of \$4.0M and an EBITDA of \$750k\*:

EV/Revenue (gross profit):	\$29.4M
EV/EBITDA (cash adjusted):	\$29.7M



**CISC current market cap: ~\$4.0M  
(undervalued, significant upside)**

\* Please refer to forward looking statements at the end of the presentation



# BUILDING SHAREHOLDER VALUE

## FACTORS INFLUENCING MARKET CAPITALIZATION (VALUATION):

### ➤ Fundamentals:

- ✓ ➤ Growing Revenue
- ✓ ➤ High Client Retention
- ✓ ➤ Employee Engagement
- ✓ ➤ Low Staff Turnover
- ✓ ➤ Growing profits
- ✓ ➤ Growing cash flows
- ✓ ➤ Investing in tomorrow
- ✓ ➤ Industry leadership

### ➤ External Factors:

- ~ ➤ Mixed economic environment
- ✓ ➤ New IR/promotional campaign
- ✓ ➤ Positive public image of Ciscom and its Management
- ✗ ➤ Prolonged period of artificial negative pressure on stock



# BUILDING OUR SHAREHOLDER VALUE

## FACTORS INFLUENCING THE MARKET CAPITALIZATION (VALUATION):

- Market Sentiments:
  - ✓ ➤ General Perception
  - ✓ ➤ Board Experience
  - ✓ ➤ Management Expertise
  - ✓ ➤ Financial Performance
  - ✓ ➤ Growing Cash Flows
  - ✓ ➤ Right time, right place
  - ✓ ➤ Business model





# WHY RAISE CAPITAL NOW

- Market Momentum
  - Capitalize on the Economic Rotation
  - Some Dilution to Build Better
- Economic Conditions/Environment
- Availability of Capital
- Availability of M&A Targets
- Lower Cost of Money
- Build with Concrete Actions



**Working on a substantial facility – *Game Changing!***

# THE WAY FORWARD

## Ciscom is:

- Forward Looking
- Building from Strength
- Entering a New Market Cycle
- Acquiring Businesses
- Delivering on its Mandate
- Positioned for Value Creation





# MANAGEMENT AND DIRECTORS

- Solid and Experienced Management / Board of Directors
  - Michel Pepin, CPA, CA: President & CEO (director)
  - Paul Gaynor: Board Chair (director)
  - Dave Mathews: President PMG/MFD (director)
  - Eric Klein, CPA, CA, CBV, ICD.D: President Klein Advisory Services (ind. director)
  - Stephen Lautens, JD: Lawyer, Diplomat, Comm. Consultant (ind. director)
  - Angel Valov, Ph.D.: Capital Market Investors (ind. director)
  - Frank Linhart, CPA, CMA: Chief Financial Officer
- Ciscom has a number of advisors providing advices on a large range of areas

# CONTACT US



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# APPENDICES METHODOLOGY & SUCCESS FORMULA

CSE: CISC, OTCQB: CISCF



# OUR WORKINGS

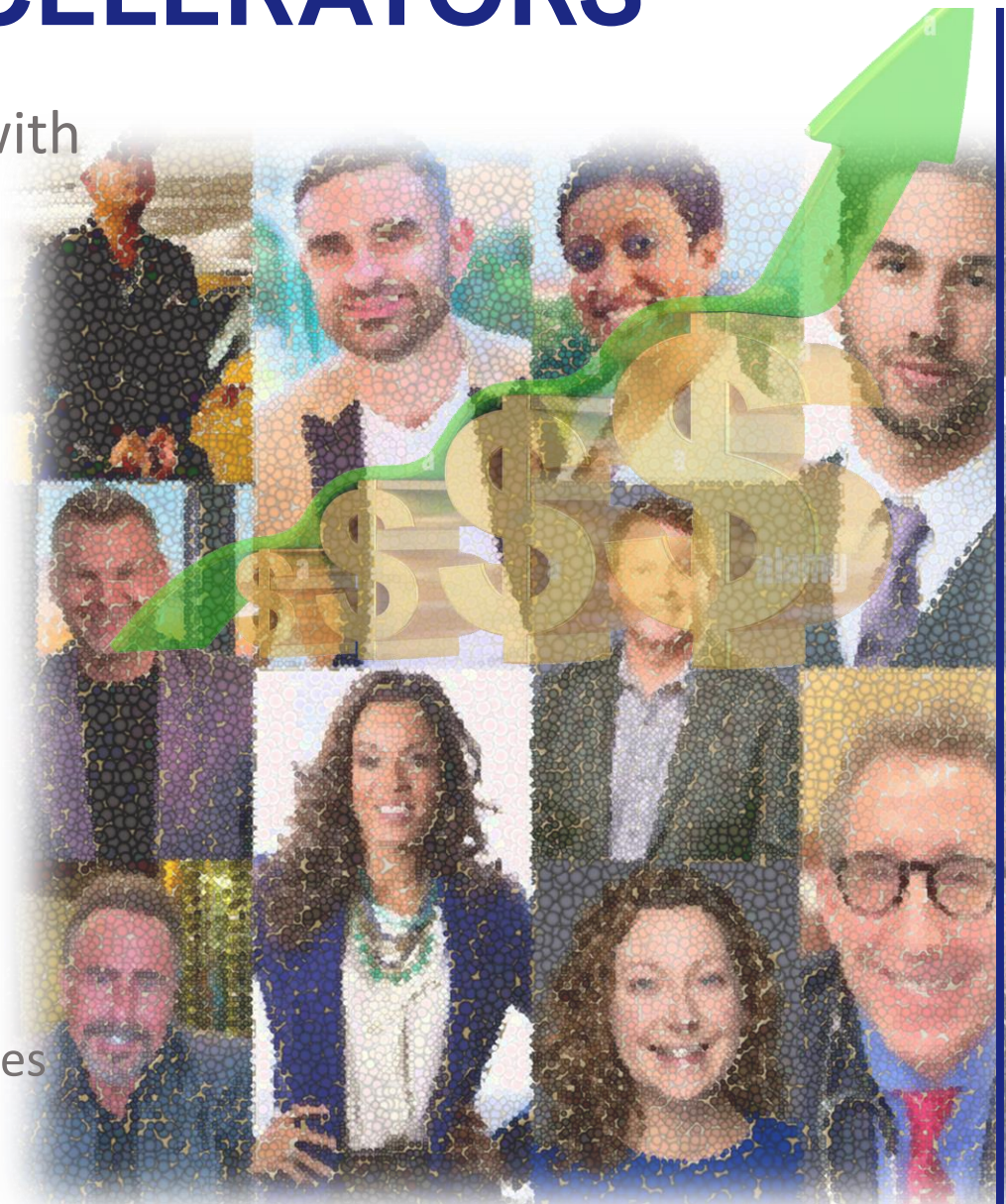


- Ciscom buys SMEs (small and medium size enterprises)
  - Pays attractive, yet lower multiples in relation to being private, size and silo operations
- Purchase price is cash plus shares, inclusive of earn-out
  - Tailored to each transaction
  - Keeps acquisition price lower
  - Provides the entrepreneur/seller with a second upside (share appreciation)
- Acquisitions remain a stand-alone entity – preserving successful cultures is essential
- Ciscom is a long-term investor
- Identify cost efficiencies and synergies
- Orderly transition plan for the selling entrepreneur (if desired)



# OUR PERFORMANCE ACCELERATORS

- The Entrepreneur/Founder continues to manage with Ciscom's support framework
- Governance matrix and delegation of authority
  - Business Plan; Banking and borrowing; Real estate, legal, audit, insurance
  - Budget & Capex; Senior staffing; M&A
- Management deep/diversified collective of talent
  - Sales, business development and marketing
  - Operations; Human Resources; Finance and Tax; Banking
  - Strategic advisory and implementation
- Procurement pooling and cost synergies/savings
  - Real estate; Legal (all levels); IT services; HR services; Finance/Tax
  - Procurement; Insurance; COGs
  - Operations
  - New business development and Cross-selling opportunities





# OUR LEVERAGES & SYNERGIES

- Accelerate growth by providing Ciscom products and services from each operation, including:
  - Sales staffing and new business development
  - Cross-selling clients on the different products & services offerings
  - Geographic expansion opportunities
- Minimizing costs through shared services and CoE (Centres of Excellence)
  - Finance & Accounting
  - Human Resources
  - IT Support & Infrastructure
  - Procurement





# OUR SUCCESSES

- Closed 2 acquisitions to date (wholly-owned):
  - Market Focus Direct (MFD) on August 31, 2021
  - Prospect Media Group (PMG) on Sept 30, 2022
- Significant leverage and synergies implemented – front and back end
- Cash flow transactions (LBO)
- Low on-going capital expenditures
- Experienced management with established track records

## PROSPECT.

*“With our complementary businesses, CISCOM is set to take on a leadership role in the Ad/MarTech sector. As an entrepreneur, I’ve now got the best of both worlds!”*  
*Dave Mathews, Founder, President of PMG*

MARKET  
FOCUS  
DIRECT

*“I sold my business, but I’m also buying into something bigger with a great upside”*  
*Paul Gaynor, Founder of MFD*

# FOR ENTREPRENEURS DIVESTING

- Provide an attractive exit to entrepreneurs/owners
- Pay a solid market multiple of EBITDA (fair valuation/purchase price)
- Considerations are cash and shares of a public company
- Entrepreneurs' decision to stay or to retire after a defined transition period
- Business remains whole and continues to operate as is – no change in staff, no moves, no rebranding
- Senior/top managers can participate through share options in Ciscom







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# APPENDICES FINANCIALS



# OUR PERFORMANCE

## ➤ SELF-FUNDED:

- Operations are cash flow positive
- Positive cash EBITDA and Net Income

## ➤ GROWTH CAPITAL:

- Acquisitions
- Acceleration of Strategic Plan
- Seeking Private Placement
  - Accordion facility
  - Follow-up capital is of definitive interest
- Credit facilities

*in \$millions*

	<b>31-Dec-22</b> (12 months) (Audited)	<b>31-Dec-23</b> (12 months) (Audited)	<b>YTD 30Sep24</b> (9 months) (Not Audited)
Growing Revenue Base	\$14.8	\$35.2	\$25.9
Gross Profit	\$2.3	\$6.9	\$4.7
Gross Profit Growth	N/A	200.5%	13.0%
EBITDA (cash-based)	-\$0.37	\$1.34	\$1.12
EBITDA increase (cash-based)	N/A	\$1.71	\$0.69
Net Income (cash-based)	-\$0.26	\$0.94	\$0.88
Net Income increase (cash-based)	N/A	\$1.44	\$0.76

Please refer to forward looking statements at the end of the presentation



# Q3 YTD F2024 SALES & GROSS PROFIT

	YTD September 30, 2024 versus 2023 and 2022						
	Actual 2024	Actual 2023	Actual 2022	2024 to 2023		2024 to 2022	
				\$	%	\$	%
Sales	25,887,712	21,464,404	2,086,543	4,423,308	20.6%	23,801,169	1140.7%
Cost of Sales	4,725,994	4,181,841	391,852	544,153	13.0%	4,334,142	1106.1%
Gross Margin	18.3%	19.5%	18.8%	12.3%	-1.2%	18.2%	-0.5%

Sales up 20.6% or \$4.4M F2024 to PY

Gross Profit up 13.0% or \$0.54M F2024 to PY

- **Organic growth**
  - New clients
  - Cross-selling products & services
- **Increased Gross Profit**
  - Added volumes
  - Leveraging



# Q3 YTD F2024 RESULTS – CASH BASIS

Non-IFRS Information and Measures			
Adjusted Net Income (Net Loss) - Cash Basis			
For the 9 months ended September 30			
	2024	2023	Increase (Decrease)
	\$	\$	\$
<b>Net Loss</b>	(337,304)	(1,095,606)	(758,302)
<b>Non-Cash Items</b>			
Share-based compensation	119,534	134,888	(15,354)
Finance charges (non-cash)	157,717	190,794	(33,077)
Amortization & Depreciation	1,172,805	1,181,857	(9,052)
Income taxes	(232,307)	(296,259)	63,952
<b>Adjusted Net Income (Net Loss) - Cash Basis</b>	<b>880,445</b>	<b>115,674</b>	<b>764,771</b>

➤ **Positive Cash-Flows from Operations**

➤ **Significant level of Non-Recurring Expenses, now Regularized**

Non-IFRS Information and Measures			
Adjusted EBITDA - Cash Basis			
For the 9 months ended September 30			
	2024	2023	Increase (Decrease)
	\$	\$	\$
<b>EBITDA</b>	1,001,234	300,098	701,136
<b>Non-Cash Items in Operating Expenses</b>	119,534	134,888	(15,354)
<b>Adjusted EBITDA (Operating Loss) - Cash Basis</b>	<b>1,120,768</b>	<b>434,986</b>	<b>685,782</b>





# F2023 SALES & GROSS PROFIT

**Gross Profit up 200.5% for F2023 to prior year**

## ➤ Acquisition and organic growth

- New clients
- Cross-selling products & services

## ➤ Increased Gross Profit

- Added volumes
- Leveraging

## ➤ Improved Margin

- Procurement synergies
- Exited unprofitable accounts

### Consolidated IFRS

	For the 12-month period ended December 31		Year-over-year	
	2023	2022	Variance	
	\$	\$	\$	%
Sales	35,160,166	14,766,407	20,393,758	138.1%
Cost of Sales	28,254,303	12,468,249	15,786,054	126.6%
Gross Profit	6,905,863	2,298,159	4,607,704	200.5%
Gross Margin	19.6%	15.6%	4.1%	26.2%

### Combined Pro-forma (PMG & MFD)

	For the 12-month period ended December 31		Year-over-year	
	2023	2022	Variance	
	\$	\$	\$	%
Sales	35,160,166	33,835,559	1,324,606	3.9%
Cost of Sales	28,254,303	27,981,682	272,621	1.0%
Gross Profit	6,905,863	5,853,877	1,051,985	18.0%
Gross Margin	19.6%	17.3%	2.3%	13.5%

# F2023 RESULTS – CASH BASIS

Non-IFRS Information and Measures			
Adjusted EBITDA (Operating Loss) - Cash Basis			
For the 12 months ended December 31			
	2023	2022	Increase (Decrease)
	\$	\$	\$
EBITDA	386,017	(698,291)	1,084,308
Non-Cash Items in Operating Expenses	957,016	327,961	629,055
<b>Adjusted EBITDA (Operating Loss) - Cash Basis</b>	<b>1,343,033</b>	<b>(370,330)</b>	<b>1,713,363</b>

Non-IFRS Information and Measures			
Non-Recurring Cash Expenses included in Results			
For the 12 months ended December 31			
	2023	2022	Increase (Decrease)
	\$	\$	\$
Professional fees	207,596	597,058	(389,462)
Re-organization costs	237,000	-	237,000
<b>Total Non-Recurring Cash Expenses in Results</b>	<b>444,596</b>	<b>597,058</b>	<b>(152,462)</b>

- Positive Cash-Flows from Operations
- Significant level of Non-Recurring Expenses





# OUR ISSUED & OUTSTANDING SHARES

## Issued & Outstanding

➤ Total shares issued:	59,265,276	100%
➤ Free trading shares:	45,645,926	77%
➤ Escrowed/restricted shares:	13,619,350	23%

## ➤ Self-Funded:

- Operations are cash flow positive
- Positive cash EBITDA and Net Income

## ➤ Public Share Float

## ➤ Insiders' ownership

- Stock Options (avg strike price of \$0.27, last maturity June 2029): 3.373M
- Warrants (strike price of \$1.00, last maturity February 2026): 0.483M
- Performance Warrants (strike price of \$0.25, last maturity May 2025): 0.500M

## ➤ Growth Capital:

- Acquisitions
- Acceleration of Strategic Plan
- Seeking Private Placement
  - Accordion facility
  - Follow-up capital is of definitive interest
- Credit facilities