



## Delivering on the plan

### Second quarter summary

- Revenue totaled SEK 1,198m (1,108), an increase by 8.1% versus second quarter 2013.
- Underlying EBITDA was SEK 566m (547), an increase of 3.5% versus second quarter of 2013.
- Operating free cash flow was SEK 327m (344).
- Net result for the period was SEK -718m (-279) affected by one-off costs of SEK 680m associated with the IPO and refinancing of debt.
- Earnings per share were SEK -6.53 (-2.79). Pro forma earnings per share<sup>(1)</sup> were SEK -0.90 (-1.34)
- The second quarter saw Com Hem delivering on the strategic plan outlined to the market:
  - ✓ The unique consumer subscriber base grew by 8,000 to a total of 846,000
  - ✓ Broadband growth continued, reaching 577,000 RGUs - a new all-time high
  - ✓ Digital-television returned to RGU growth for the first time since the first quarter of 2013
  - ✓ With 103,000 TiVo customers (17.1% penetration) Com Hem reached an important milestone
  - ✓ Increased focus in B2B with Phonera consolidated as of March 31, (contributing of SEK 65m of revenue for the quarter or 5.8% of revenue growth versus second quarter of 2013)
- Com Hem was listed on NASDAQ OMX Stockholm, Large Cap on June 17, 2014, issuing new shares of SEK 5,670m. After the end of the period, on July 4, 2014, the over-allotment option was exercised by issuing of new shares of SEK 567m.
- First phase of refinancing completed and the blended interest margin has been reduced. Net debt/underlying EBITDA was at 4.0x end of June (6.4x prior to listing) and 3.9x after exercise of the over-allotment option.

### Six months summary

- Revenue totaled SEK 2,322m (2,231), an increase by 4.1% versus first six months of 2013.
- Underlying EBITDA was SEK 1,110m (1,091), an increase of 1.8% versus first six months of 2013.
- Operating free cash flow was SEK 656m (717).
- Net result for the period was SEK -895m (-268) affected by one-off costs of SEK 680m associated with the IPO and refinancing of debt.
- Earnings per share were SEK -8.53 (-2.67). Pro forma earnings per share<sup>(1)</sup> were SEK -1.75 (-1.29)

### Key financial metrics

	Apr-Jun		Change	Jan-Jun		Change	Jan-Dec
	2014	2013		2014	2013		
Revenue, SEKm	1,198	1,108	8.1%	2,322	2,231	4.1%	4,448
Underlying EBITDA, SEKm	566	547	3.5%	1,110	1,091	1.8%	2,200
Underlying EBITDA-margin, %	47.2%	49.4%	-2.1 p.p.	47.8%	48.9%	-1.1 p.p.	49.5%
Operating profit (EBIT), SEKm	60	182	-66.9%	207	344	-39.8%	657
Net result for the period, SEKm	-718	-279	n/m	-895	-268	n/m	-771
Earnings per share, SEK	-6.53	-2.79	-3.74	-8.53	-2.67	-5.86	-7.71
Pro forma earnings per share, SEK <sup>(1)</sup>	-0.90	-1.34	0.44	-1.75	-1.29	-0.46	-3.72
CAPEX, SEKm	239	203	17.7%	454	374	21.4%	1,038
CAPEX as % of revenue	20.0%	18.3%	1.6% p.p.	19.5%	16.8%	2.8 p.p.	23.3%
Operating free cash flow, SEKm	327	344	-4.9%	656	717	-8.5%	1,162
Net debt, SEKm	9,110	13,186	-30.9%	9,110	13,186	-30.9%	13,582
Net debt/Underlying EBITDA LTM	4.0x	5.9x	1.8x	4.0x	5.9x	1.8x	6.2x

Definitions on page 13

1) Net result for the period excluding one-off costs associated with the IPO and refinancing of debt, adjusted for income tax, divided by the number of shares after the issuance of new shares and exercise of the over-allotment option. See *Pro forma earnings per share* on page 12.

## CEO's comments

### Delivering on the plan

Our business reported strong growth in the second quarter supported by the inclusion of Phonera's B2B operations from March 31. Total revenue was up more than 8% compared to corresponding quarter last year, with consumer revenue increasing by more than 2%. Our strong momentum within broadband continues with an all-time high number of broadband RGUs. We have also successfully returned our digital-television business to RGU growth, reaching an important milestone with more than 100,000 TiVo customers and further strengthening the product with 38 new channels added to TiVoToGo™. Our TiVo customers now have over 100 channels available on several devices.

We are pleased to have completed the IPO and listing of Com Hem on NASDAQ OMX Stockholm, Large Cap. The proceeds from the issue of new shares reduce Com Hem's debt and increase our financial flexibility which strengthens our position to grow our business profitable. The first step of our refinancing has now been completed. The proceeds from the issue of new shares have been used to reduce the pre-IPO debt by approximately SEK 5.5b and the leverage ratio to 4.0x before the exercise of the over-allotment option and 3.9x after the full exercise of the over-allotment option.

Our strategic focus for growing our business is clear and we will capitalize on our strengths. Com Hem offers the leading broadband service in the market, with a well invested network and speed superiority on at least 80% within our footprint.

We have the unique digital-TV product in TiVo with the richest content offering in the Swedish market. We have a significant opportunity in bundling, compared to our international peers with the first step in our bundling strategy due in the coming months. From the second quarter Phonera is part of the Group contributing to our increased focus on the B2B segment.

Operationally, improving our customers' experience of Com Hem is our no. 1 priority; myself and the management team are committed to driving significant, improvement within this key area.

By focusing on these areas we will grow our business sustainably and steadily execute on our growth strategy going forward.



Stockholm July 14, 2014

**Anders Nilsson**  
CEO

### Significant events · Q2 2014

- Phonera acquisition completed as of March 31 and included in the second quarter results.
- Anders Nilsson joined Com Hem as CEO on April 7.
- Monica Caneman and Eva Lindqvist were elected as new board members at the AGM on May 12.
- An initial public offering was announced on May 23.
- The Com Hem share was listed on NASDAQ OMX Stockholm on June 17, 2014, issuing new shares of SEK 5,670m.
- On July 4, 2014 the over-allotment option was exercised by issuing of new shares of SEK 567m.

## Operational Development

Comparisons are between q2 2014 and q1 2014 if not otherwise stated.

As of and for the period ended						
Operational key metrics	Q1 2013	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014
Thousands unless otherwise stated						
Homes connected	1,777	1,777	1,789	1,817	1,830	1,832
Unique consumer subscribers	823	822	829	830	838	846
Unique consumer subscribers as % of homes connected	46.3%	46.2%	46.4%	45.7%	45.8%	46.2%
Consumer RGUs per unique consumer subscriber, ratio	1.82	1.80	1.79	1.79	1.78	1.78
Consumer churn as % of unique consumer subscribers	16.3%	16.4%	16.3%	16.3%	15.2%	16.4%
<b>Consumer RGUs</b>	<b>Q1 2013</b>	<b>Q2 2013</b>	<b>Q3 2013</b>	<b>Q4 2013</b>	<b>Q1 2014</b>	<b>Q2 2014</b>
Digital-television	613	606	603	597	595	599
-of which TiVo customers	-	-	6	38	74	103
Broadband	542	543	551	558	570	577
Fixed telephony	339	334	330	327	327	326
Total consumer RGUs	1,495	1,483	1,484	1,482	1,492	1,503
<b>ARPU, SEK</b>	<b>Q1 2013</b>	<b>Q2 2013</b>	<b>Q3 2013</b>	<b>Q4 2013</b>	<b>Q1 2014</b>	<b>Q2 2014</b>
Consumer	359	356	354	355	359	360
Landlord	38	38	37	36	37	35

### Unique consumer subscribers

As of June 30, the number of unique consumer subscribers was 846,000, an increase of 8,000 compared with the end of the first quarter of 2014. The increase was mainly due to a growth in broadband RGUs. The increase in unique consumer subscribers compared with the second quarter of 2013 was 24,000 also mainly attributable to a growth in broadband RGUs.

### Consumer RGUs

During the second quarter the previous negative trend in digital-television RGUs was reverted, with a growth of 4,000 RGUs to 599,000 RGUs as of June 30, 2014. The increase was mainly attributable to an increased sales momentum for Com Hem's digital-television services, supported by the earlier launch of the TiVo service. Since the commercial launch of TiVo 103,000 digital-television customers subscribe on the TiVo service, which is equivalent to a penetration of 17.1% of the total number of digital-television RGUs. Compared to the end of the second quarter of 2013, digital-television RGUs are 6,000 lower.

Broadband RGUs increased with 7,000 during the quarter amounting to 577,000 as of June 30, 2014. The growth during the quarter was attributable to continued high demand for Com Hem's strong market leading broadband offerings. Compared to the second quarter of 2013, broadband RGUs increased with 34,000.

Com Hem had 326,000 fixed telephony RGUs as of June 30, 2014, a decrease of 1,000 RGUs compared with as of March 31, 2014 and a stabilization of the previous declining trend in number of RGUs. The decrease during the quarter was mainly due to a shrinking overall market as a consequence of changing consumer behavior and lower usage of fixed telephony services due to the fixed to mobile substitution. Compared to the end of the second quarter of 2013, fixed telephony RGUs decreased by 8,000 RGUs.

Consumer RGUs totaled 1,503,000, an increase of 11,000 during the quarter. The increase was due to growth in broadband and digital-television RGUs, partly offset by a decrease in fixed telephony RGUs. The increase of 20,000 compared with the second quarter of 2013, was due to an increase in broadband RGUs.

### Consumer RGUs per unique consumer subscriber

The number of RGUs per unique subscriber was 1.78 at the end of the quarter which is the same level as previous quarter and a decrease compared with the second quarter of 2013.

### Consumer ARPU

Consumer ARPU was SEK 360 for the quarter, an increase of SEK 1, compared with the first quarter of 2014. The increase was mainly due to improved digital-television and broadband revenue compared with the first quarter of 2014, partly offset by a decrease in fixed telephony revenue.

### Consumer Churn

Consumer churn for the second quarter was 16.4%, compared to 15.2% for the first quarter of 2014. The increase reflects the impact of a price rise in May. Underlying non-price-rise-related churn was in line with the previous quarter. The second quarter churn 2014 was consistent with the second quarter of 2013 performance at 16.4%.

### Homes connected

As of June 30, Com Hem had 1,832,000 homes connected, an increase of 2,000 households during the quarter. The increase was attributable to connection of additional households via open networks from third party communication operators as well as an increased number of vertical LAN households. Compared with June 30, 2013 homes connected have increased with 55,000 households mainly due to an increased number of households connected via open networks.

### Landlord ARPU

Landlord ARPU decreased compared with the first quarter of 2014 and was SEK 35. The decrease was mainly due to contract renegotiation effects, seasonality effects, migration of customers to B2B services and lower connection fees for the quarter. The landlord ARPU decreased compared with the second quarter of 2013, mainly attributable to contract renegotiation effects and migration of customers to B2B services.

## Financial Overview

### Second quarter

Comparisons are between q2 2014 and q2 2013 if not otherwise stated.

SEKm	Apr-Jun		Jan-Jun	
	2014	2013	2014	2013
<b>Revenue</b>				
Consumer	877	854	1,743	1,720
B2B <sup>(1)</sup>	70	0	72	0
Landlord	196	201	397	403
Other	55	53	110	108
<b>Total Revenue</b>	<b>1,198</b>	<b>1,108</b>	<b>2,322</b>	<b>2,231</b>
<b>Underlying EBITDA</b>	<b>566</b>	<b>547</b>	<b>1,110</b>	<b>1,091</b>
Capital expenditure	-239	-203	-454	-374
<b>Operating free cash flow</b>	<b>327</b>	<b>344</b>	<b>656</b>	<b>717</b>

1) Historically, Com Hem has reported B2B revenue among Other revenue. As of q2 2014, B2B revenue is reported as a separate line item.

#### Revenue

Revenue increased by SEK 90m, or 8.1%, to SEK 1,198m (1,108) of which Phonera contributed with SEK 65m or 5.8%. Excluding Phonera, the increase was SEK 26m, or 2.3%. In comparison with the first quarter 2014, revenue increased by 6.6% or by 0.9% excluding Phonera revenue contribution.

Revenue from consumer services increased by SEK 23m or 2.8% and totaled SEK 877m (854). The increase was due to higher revenue from broadband driven by an increased number of RGUs and improved tier mix as a function of continued high demand from both new and existing customers for Com Hem's 100 – 1000 Mbit/s broadband services. The increase in consumer revenue was also attributable to higher digital-television revenue, as a result of better tier mix due to sales of TiVo packages as well as migration of existing digital-television customers to TiVo packages. The increase in revenue from digital-television and broadband services was partly offset by a decrease in fixed telephony revenue, due to both less fixed telephony RGUs and lower usage of the fixed telephony service. Revenue from digital-television services totaled SEK 434m (418). Revenue from broadband services was SEK 356m to (329). Revenue from fixed telephony services was SEK 87m (107).

Revenue from B2B services was SEK 70m compared to SEK 0m for the second quarter of 2013. Phonera contributed with SEK 65m to the aggregated B2B revenue.

Revenue from landlord services decreased by SEK 5m or 2.3% and totaled SEK 196m (201). The decrease was primarily due to a reduction in ARPU from landlord customers mainly as a result of contract renegotiations and migration of customers from landlord services to B2B services.

Other revenue increased by SEK 1m or 2.8% and was SEK 55m (53). The increase was due to higher revenue from iTUX, the Group's communication operator.

#### Underlying EBITDA

Underlying EBITDA increased by SEK 19m or 3.5%, to SEK 566m (547) and the underlying EBITDA-margin was 47.2% (49.4). The increase in underlying EBITDA was mainly due to revenue growth from the consumer services and the revenue contribution from Phonera B2B services. The underlying EBITDA-margin was slightly lower as a consequence of adding Phonera production and operating costs to the Group's cost base.

#### Capital expenditure (Capex)

Capital expenditure increased by SEK 36m, or 17.7%, and totaled SEK 239m (203), as a percentage of revenue capital expenditure was 20.0% (18.3). The increase was partly due to success-driven higher capitalized sales costs driven by increased sales volumes and migration activities during the second quarter as well as higher investments in TiVo STB's and higher investment in modems, due to continued high demand for higher broadband speeds. The increase in capex was partly offset by lower network related capex due to lower TiVo platform investments.

#### Operating free cash flow

Operating free cash flow (underlying EBITDA less Capex) decreased by SEK 17m, or 4.9%, and totaled SEK 327m (344). The decrease was mainly due to increased success-based capex, partly offset by higher underlying EBITDA contribution.

#### Operating profit (EBIT)

Operating profit (EBIT) was SEK 60m (182). The decrease was mainly due to higher operating expenses, as a result of non-recurring items of SEK 142m (33) of which SEK 107m was IPO expenses. The higher non-recurring item was partly offset by an increase in underlying EBITDA of SEK 19m.

#### Net financial income and expenses

Financial income and expenses amounted to a net expense of SEK 983m (540). The increase, SEK 443m, was explained by one-off costs of SEK 573m associated to refinancing of the Senior Credit Facilities and the upcoming redemption of the Senior PIK Notes and 35% of the Senior Notes. The one-off costs consist of unamortized borrowing costs of SEK 302m related to the repaid credit facilities and the Notes with original amortization period until 2018-2019 now expensed as one-offs, and redemption premiums of SEK 271m.

#### Income taxes

The Group recognized a deferred tax income of SEK 204m (79). The increase was mainly due to a higher loss after financial items as a consequence of the costs related to the IPO and the refinancing of the Senior Credit Facilities, as well as the cost for the upcoming redemption of the Senior PIK Notes and 35% of the Senior Notes.

#### Net result for the period

The Group recognized a net result of SEK -718m (-279). Excluding one-off costs associated with the IPO and refinancing of debt amounting to SEK 680m, net result for the quarter was SEK -188m (-279).

SEKm	Apr-Jun		Jan-Jun	
	2014	2013	2014	2013
<b>Total Revenue</b>	<b>1,198</b>	<b>1,108</b>	<b>2,322</b>	<b>2,231</b>
Operating expenses <sup>(1)</sup>	-1,138	-925	-2,115	-1,886
<b>Operating profit (EBIT)</b>	<b>60</b>	<b>182</b>	<b>207</b>	<b>344</b>
Net financial income and expenses	-983	-540	-1,332	-698
<b>Result after financial items</b>	<b>-923</b>	<b>-357</b>	<b>1,125</b>	<b>-354</b>
Income taxes	204	79	230	87
<b>Net result for the period</b>	<b>-718</b>	<b>-279</b>	<b>-895</b>	<b>-268</b>

1) Operating expenses include cost of sales and services, selling expenses, administrative expenses and other operating income and expenses

## Six months

Comparisons are between h1 2014 and h1 2013 if not otherwise stated.

### Revenue

Total revenue increased by 4.1% and was SEK 2,322m (2,231). Revenue from consumer services increased by SEK 24m or 1.4% and was SEK 1,743m (1,720). The increase was due to higher revenue from broadband driven by an increased number of RGUs and improved tier mix as a function of continued high demand from both new and existing customers for Com Hem's 100 – 1000 Mbit broadband services. The increase in consumer revenue was also attributable to higher digital-television revenue, as a result of better tier mix due to sales of TiVo packages as well as migration of existing digital-television customers to TiVo packages. The increase in revenue from digital-television and broadband services was partly offset by a decrease in fixed telephony revenue, due to both less fixed telephony RGUs and lower usage of the fixed telephony service. Revenue from digital-television services totaled SEK 865m (845). Revenue from broadband services was SEK 700m to (654). Revenue from fixed telephony services was SEK 178m (220).

Revenue from B2B services was SEK 72m compared to SEK 0m for the first six months of 2013. For the six months ended June 30 2014, Phonera contributed with SEK 65m to the aggregated B2B Group revenue.

Revenue from landlord services decreased by SEK 7m or 1.6% and was SEK 397m (403). The decrease was primarily due to a reduction in ARPU from landlord customers mainly as a result of contract renegotiations and migration of customers from landlord services to B2B services.

Other revenue increased by SEK 2m, or 2.2%, and was SEK 110m (108). The increase was mainly explained by higher revenue from iTUX, the Group's communication operator.

### Underlying EBITDA

Underlying EBITDA increased by 1.8% and was SEK 1,110m (1,091) and the underlying EBITDA-margin was 47.8% (48.9). The increase in underlying EBITDA was mainly due to revenue growth from the consumer services and the revenue contribution from Phonera B2B services. The underlying EBITDA-margin was slightly lower as a consequence of adding Phonera production and operating costs to the Group's cost base.

### Capital expenditure (Capex)

Capital expenditure increased by SEK 80m, or 21.4%, and was SEK 454m (374), as a percentage of revenue capital expenditure were 19.5% (16.8). The increase was due to success-driven TiVo STB's and higher investment in modems due to continued high demand for higher speeds and increased capitalized sales costs as a consequence of increased sales volumes and migration activities. The increase was partly offset by lower network related capex due to lower TiVo platform investments.

### Operating free cash flow

Operating free cash flow (underlying EBITDA less Capex) decreased by SEK 61m, or 8.5%, and was SEK 656m (717). The decrease was mainly due to increased CPE investment and capitalized sales costs, partly offset by higher underlying EBITDA contribution.

### Operating profit (EBIT)

Operating profit (EBIT) was SEK 207m (344). The decrease was mainly due to higher operating expenses, as a result of non-recurring items of SEK 198m (74) of which SEK 107m was IPO expenses. The higher non-recurring item was partly offset by an increase in underlying EBITDA of SEK 19m.

### Net financial income and expenses

Financial income and expense amounted to a net expense of SEK 1,332m (698). The increase, SEK 634m, was mainly explained by one-off costs of SEK 573m associated to refinancing of the Senior Credit Facilities, the upcoming redemption of the Senior PIK Notes and 35% of the Senior Notes. The one-off costs consist of unamortized borrowing costs of SEK 302m related to the repaid credit facilities and the Notes with original amortization period until 2018-2019 now expensed as one-offs, and redemption premiums of SEK 271m.

### Income taxes

Deferred tax income was SEK 230m (87). The increase was mainly due to a higher loss after financial items as a consequence of the costs related to the IPO and the refinancing of the Senior Credit Facilities, and the costs related to the upcoming redemption of the Senior PIK Notes and 35% of the Senior Notes.

### Net result for the period

The Group recognized a net result of SEK -895m (-268). Excluding one-off costs associated with the IPO and refinancing of debt amounting to SEK 680m, net result for the period was SEK -364m (-268).

### Net debt – refinancing

On May 22, 2014 Com Hem entered into a new facilities agreement with a consortium of banks. The facilities available under the 2014 Senior Facilities Agreement comprise of a SEK 3,500m term facility, with a final maturity date five years from the date of its initial drawdown and a SEK 2,000m multi-currency revolving credit facility, with the final maturity date five years following the date of initial drawdown of the term facility. The new facilities comprise one covenant relating to leverage ratios that will be reported quarterly.

The net proceeds from the issue of new shares, together with drawdowns under the 2014 Senior Facilities Agreement, have refinanced certain of Com Hem's financial indebtedness. On June 26, Com Hem refinanced the previous Senior Credit Facilities, at more attractive terms and with longer maturity. In connection with the refinancing, Com Hem terminated certain hedging contracts.

As of June 30, 2014 the Group's net debt totaled SEK 9,110m. In connection with the listing, the net indebtedness was reduced by the proceeds raised during the issue of the new shares. As of June 30, 2014, the net debt/underlying EBITDA ratio was 4.0x.

### Liquidity

As of June 30, 2014 the Group held SEK 4,640m (658) of cash and cash equivalents.

### Events after the reporting period

On July 4, Com Hem redeemed the Senior PIK Notes in full and 35% of the amount outstanding for the Senior Notes. As of June 30, 2014, the outstanding amount of the Senior PIK Notes was EUR 322m (including accrued interest) and the outstanding amount of the Senior Notes was EUR 298m, both amounts including redemption premiums.

On July 4, the over-allotment option was exercised by issuing new shares of SEK 567m. The over-allotment increased the number of shares by 9,775,418 to a total number of shares of 207,529,597. The majority shareholder BC Partners ownership of Com Hem was reduced from 50.0% to 47.7%. The payment was settled on July 7.



**Board's assurance**

The Board of Directors and the CEO certify that the Interim Report gives a true and fair overview of the Parent Company's and Group's operations, their financial position and results of operations, and describes the material risks and uncertainties facing the Parent Company and other companies in the Group.

Stockholm July 14, 2014

Andrew Barron  
Chairman of the Board

Monica Caneman  
Board member

Joachim Jaginder  
Board member

Eva Lindqvist  
Board member

Joachim Ogland  
Board member

Nikos Stathopoulos  
Board member

Tina Bergström Darrell  
Employee representative

Marianne Bohlin  
Employee representative

Anders Nilsson  
Board member and CEO

**Review report**

Com Hem Holding AB, Corp. id. 556858-6613

**Introduction**

We have reviewed the condensed interim financial information (the interim report) of Com Hem Holding AB as of June 30, 2014 and the six-month period then ended. The Board of Directors and the Chief Executive Officer are responsible for the preparation and presentation of this interim report in accordance with IAS 34 and the Annual Accounts Act. Our responsibility is to express a conclusion on this interim report based on our review.

**Scope of review**

We conducted our review in accordance with International Standard on Review Engagements ISRE 2410 Review of Interim Financial Information Performed by the Independent Auditor of the Entity. A review of interim financial information consists of making inquiries, primarily of persons responsible for financial and accounting matters, and applying analytical and other review procedures. A review is substantially less in scope than an audit conducted in accordance with International Standards on Auditing and other generally accepted auditing practices and consequently does not enable us to obtain assurance that we would become aware of all significant matters that might be identified in an audit. Accordingly, we do not express an audit opinion.

**Conclusion**

Based on our review, nothing has come to our attention that causes us to believe that the interim report is not prepared, in all material respects, for the Group in accordance with IAS 34 and the Annual Accounts Act, and for the Parent Company in accordance with the Annual Accounts Act.

Stockholm July 14, 2014

KPMG AB

Thomas Thiel  
Authorized Public Accountant

## Condensed Consolidated Income Statement

SEKm	Apr-Jun		Jan-Jun		Jan-Dec
	2014	2013	2014	2013	2013
Revenue	1,198	1,108	2,322	2,231	4,448
Cost of sales and services	-585	-542	-1,134	-1,115	-2,190
<b>Gross profit</b>	<b>613</b>	<b>566</b>	<b>1,188</b>	<b>1,115</b>	<b>2,258</b>
Selling expenses	-384	-334	-745	-668	-1,378
Administrative expenses	-62	-55	-126	-113	-220
Other operating income and expenses	-106	5	-110	10	-3
<b>Operating profit</b>	<b>60</b>	<b>182</b>	<b>207</b>	<b>344</b>	<b>657</b>
Net financial income and expenses	-983	-540	-1,332	-698	-1,537
<b>Result after financial items</b>	<b>-923</b>	<b>-357</b>	<b>-1,125</b>	<b>-354</b>	<b>-880</b>
Income taxes	204	79	230	87	109
<b>Net result for the period</b>	<b>-718</b>	<b>-279</b>	<b>-895</b>	<b>-268</b>	<b>-771</b>
Average number of shares, thousands 1)	109,962	100,013	104,864	100,013	100,013
Earnings per share, SEK	-6.53	-2.79	-8.53	-2.67	-7.71
Earnings per share, diluted, SEK	-6.53	-2.79	-8.53	-2.67	-7.71

1) Average number of shares has been adjusted for the bonus issue in June 2014.

## Consolidated Statement of Comprehensive Income

SEKm	Apr-Jun		Jan-Jun		Jan-Dec
	2014	2013	2014	2013	2013
<b>Net result for the period</b>	<b>-718</b>	<b>-279</b>	<b>-895</b>	<b>-268</b>	<b>-771</b>
<b>Other comprehensive income</b>					
<i>Items that will not be reclassified to net profit or loss</i>					
Revaluation of pension obligations	-38	59	-38	59	59
Tax on items that will not be reclassified to profit or loss	8	-13	8	-13	-13
<b>Other comprehensive income for the period, net of tax</b>	<b>-30</b>	<b>46</b>	<b>-30</b>	<b>46</b>	<b>46</b>
<b>Total comprehensive income for the period</b>	<b>-748</b>	<b>-233</b>	<b>-925</b>	<b>-222</b>	<b>-725</b>

## Condensed Consolidated Balance Sheet

SEKm	Jun, 30		Dec, 31
	2014	2013	2013
<b>ASSETS</b>			
<b>Non-current assets</b>			
Intangible assets	16,244	16,275	16,154
Property, plant and equipment	1,458	1,370	1,463
Other non-current assets	6	6	6
<b>Total non-current assets</b>	<b>17,708</b>	<b>17,651</b>	<b>17,624</b>
<b>Current assets</b>			
Other current assets	410	259	274
Cash and cash equivalents	4,640	658	1,122
<b>Total current assets</b>	<b>5,050</b>	<b>917</b>	<b>1,397</b>
<b>TOTAL ASSETS</b>	<b>22,758</b>	<b>18,568</b>	<b>19,021</b>
<b>EQUITY AND LIABILITIES</b>			
<b>Total equity</b>	<b>6,865</b>	<b>2,715</b>	<b>2,212</b>
<b>Non-current liabilities</b>			
Non-current interest-bearing liabilities	8,490	12,932	13,857
Other non-current liabilities	160	266	235
Deferred tax liabilities	465	693	671
<b>Total non-current liabilities</b>	<b>9,115</b>	<b>13,891</b>	<b>14,763</b>
<b>Current liabilities</b>			
Current interest-bearing liabilities	5,012	335	308
Other current liabilities	1,766	1,627	1,738
<b>Total current liabilities</b>	<b>6,777</b>	<b>1,962</b>	<b>2,046</b>
<b>TOTAL LIABILITIES</b>	<b>15,893</b>	<b>15,853</b>	<b>16,809</b>
<b>TOTAL EQUITY AND LIABILITIES</b>	<b>22,758</b>	<b>18,568</b>	<b>19,021</b>
Number of shares, end of period, thousands <sup>1)</sup>	197,754	100,013	100,013
Equity per share, SEK	35	27	22

<sup>1)</sup> The number of shares for 2013 has been adjusted for the bonus issue in June 2014.

## Condensed Consolidated Statement of Changes in Equity

Equity attributable to Equity Holders of the Parent

SEKm	Jun, 30		Dec, 31
	2014	2013	2013
<b>Opening equity</b>	<b>2,212</b>	<b>2,937</b>	<b>2,937</b>
<b>Total comprehensive income for the period</b>			
Net result for the period	-895	-268	-771
Other comprehensive income for the period	-30	46	46
<b>Total comprehensive income for the period</b>	<b>-925</b>	<b>-222</b>	<b>-725</b>
<b>Transactions with the owners</b>			
New share issue	2	-	-
Redemption of shares	-5	-	-
New share issue	5,670	-	-
Issue expenses	-99	-	-
Issue of warrants	10	-	-
<b>Total transactions with the owners</b>	<b>5,578</b>	<b>-</b>	<b>-</b>
<b>Closing equity</b>	<b>6,865</b>	<b>2,715</b>	<b>2,212</b>



## Condensed Consolidated Statement of Cash Flows

SEKm	Apr-Jun		Jan-Jun		Jan-Dec
	2014	2013	2014	2013	2013
<b>Operating activities</b>					
Result after financial items	-923	-357	-1,125	-354	-880
Adjustments for items not included in cash flow	823	465	1,419	913	1,931
<b>Cash flow from operating activities before changes in working capital</b>	<b>-100</b>	<b>108</b>	<b>294</b>	<b>559</b>	<b>1,051</b>
Change in working capital	31	-52	-42	-116	-15
<b>Cash flow from operating activities</b>	<b>-69</b>	<b>55</b>	<b>252</b>	<b>443</b>	<b>1,035</b>
<b>Investing activities</b>					
Acquisition of intangible assets	-107	-63	-183	-125	-383
Acquisition of property, plant and equipment	-131	-140	-270	-240	-614
Acquisition of subsidiaries	-11	-1	-302	-8	-8
<b>Cash flow from investing activities</b>	<b>-248</b>	<b>-205</b>	<b>-755</b>	<b>-372</b>	<b>-1,005</b>
<b>Financing activities</b>					
New share issue	5,672	-	5,672	-	-
Borrowings	4,800	100	4,800	100	800
Amortization of borrowings	-6,252	-34	-6,399	-174	-354
Payment of transaction costs	-56	-	-56	-1	-16
Redemption of shares	-5	-	-5	-	-
Issue of warrants	10	-	10	-	-
<b>Cash flow from financing activities</b>	<b>4,169</b>	<b>66</b>	<b>4,022</b>	<b>-75</b>	<b>430</b>
<b>Net cash flow for the period</b>	<b>3,852</b>	<b>-83</b>	<b>3,518</b>	<b>-4</b>	<b>460</b>
<b>Cash and cash equivalents at beginning of period</b>	<b>789</b>	<b>742</b>	<b>1,122</b>	<b>662</b>	<b>662</b>
<b>Cash and cash equivalents at end of period</b>	<b>4,640</b>	<b>658</b>	<b>4,640</b>	<b>658</b>	<b>1,122</b>

SEKm	Apr-Jun		Jan-Jun		Jan-Dec
	2014	2013	2014	2013	2013
<b>Adjustment for items not included in cash flow</b>					
Depreciation, amortization and impairment of assets	357	333	697	674	1,352
Unrealized exchange rate differences	190	347	195	99	253
Unrealized change in fair value of financial liabilities	-162	-164	-182	-104	-140
Change in capitalized borrowing expenses and discounts	325	29	355	56	113
Change in accrued interest expense	-247	-153	-86	49	45
Interest not settled with cash, notes	83	72	161	135	285
Redemption premiums	271	-	271	-	-
Other	6	1	8	3	23
<b>Total</b>	<b>823</b>	<b>465</b>	<b>1,419</b>	<b>913</b>	<b>1,931</b>

## Parent Company Condensed Financial Reports

Condensed income statement SEKm	Apr-Jun		Jan-Jun		Jan-Dec
	2014	2013	2014	2013	2013
Revenue	3	-	3	-	-
Administrative expenses	-3	-	-3	-	-
Other operating income and expenses	-98	-	-98	-	-
<b>Operating profit/loss</b>	<b>-98</b>	<b>-</b>	<b>-98</b>	<b>-</b>	<b>-</b>
Net financial income and expenses <sup>(1)</sup>	-1,405	76	-1,321	152	-
<b>Result after financial items</b>	<b>-1,503</b>	<b>76</b>	<b>-1,419</b>	<b>152</b>	<b>-</b>
Income taxes <sup>(2)</sup>	-	-	-	-	-
<b>Net result for the period</b>	<b>-1,503</b>	<b>76</b>	<b>-1,419</b>	<b>152</b>	<b>-</b>

<sup>1)</sup> Includes write-down of shares in subsidiaries following a shareholder's contribution given.

<sup>2)</sup> The taxable profit in the parent company will be offset by a group contribution to subsidiaries at year end, as such no income taxes have been accounted for.

Statement of comprehensive income SEKm	Apr-Jun		Jan-Jun		Jan-Dec
	2014	2013	2014	2013	2013
Net result for the period	-1,503	76	-1,419	152	-
Other comprehensive income	-	-	-	-	-
<b>Total comprehensive income for the period</b>	<b>-1,503</b>	<b>76</b>	<b>-1,419</b>	<b>152</b>	<b>-</b>

Condensed balance sheet SEKm	Jun, 30		Dec, 31
	2014	2013	2013
<b>ASSETS</b>			
Non-current assets	4,703	4,370	4,534
Other current assets	4	-	-
Cash and bank	4,187	-	-
<b>TOTAL ASSETS</b>	<b>8,894</b>	<b>4,370</b>	<b>4,534</b>
<b>EQUITY AND LIABILITIES</b>			
Total equity	8,376	4,369	4,217
Current liabilities	518	1	317
<b>TOTAL EQUITY AND LIABILITIES</b>	<b>8,894</b>	<b>4,370</b>	<b>4,534</b>

### Pledged assets and contingent liabilities

Pledged assets	-	-	-
Contingent liabilities	-	-	-

## Other Information

### Basis of preparation

The consolidated accounts of the Group are prepared in accordance with International Financial Reporting Standards ("IFRSs") as endorsed by the EU and disclosed in the Group's Annual Report for 2013 and presented in million Swedish kronor (SEKm) which is also the Group's functional currency. The new or amended IFRS, which became effective on January 1, 2014, have had no material effect on the Consolidated Financial Statements. The Interim Report is prepared in accordance with IAS 34 Interim Financial Reporting and the Annual Accounts Act. Condensed financial statements for the parent company are prepared in accordance with the Annual Accounts Act and RFR 2 Accounting for legal entities.

### Reclassification and presentation of revenue

As of January 1, 2014, Com Hem adopted a new methodology regarding the classification of revenue by digital service generated from landlord collective agreements. Revenue from digital-television-, broadband- and fixed telephony services generated under such agreements were historically reported in landlord service revenue. As of January 1, 2014, revenue generated from such digital services has been reclassified to its respective underlying digital service. For comparative purposes, historical amounts have been reclassified accordingly.

In line with the Group's strategic focus in offering bundled digital services (digital television, broadband and fixed telephony) and the expansion into the B2B market with the acquisition of Phonera Företag, revenue is from second quarter 2014 presented for Consumers-, B2B- and Landlord-services on an aggregated level. For comparative purposes, historical amounts have been aggregated accordingly.

### Other adjustments

Certain numerical information and other amounts and percentages presented in this report may not sum due to rounding. In addition, certain figures in this document have been rounded to the nearest whole number. As used herein, the symbol "n/m" means "not meaningful."

### Operating segment

The operations of the Group are integrated and constitute a single operating segment that offers bundled services to Consumers (digital-television, broadband and fixed telephony), B2B (broadband and telephony) and Landlord (basic television service), on a single market, Sweden. This is also the base of the Group's management structure and the structure for internal reporting, which is controlled by the Group's Chief Executive Officer, who has been identified as its chief operating decision maker. As such, the Group does not present any operating segment information.

### AGM and Board of Directors

Following the Annual General Meeting on May 12, 2014, the board of directors consists of: Andrew Barron, Monica Caneman, Joachim Jaginder, Eva Lindqvist, Anders Nilsson, Joakim Ogland, Nikos Stathopoulos. Andrew Barron was elected chairman of the board. KPMG AB, in its capacity as registered audit firm, has been re-elected for the period until the end of the 2015 annual general meeting. Thomas Thiel is the auditor-in-charge.

### Number of shares

Before the IPO and issue of new shares Com Hem had 42,195,626 shares outstanding. After the issue of new shares the total number of shares outstanding totaled 197,754,179 as per June 30, 2014.

Change, No of shares	Class A ordinary shares	Class B ordinary shares	Preference shares	Total shares
<b>No. of shares as of Jan 1, 2014</b>	<b>13,110,717</b>	<b>73,490</b>	<b>28,987,918</b>	<b>42,172,125</b>
New issue	10,469	7,784	5,248	23,501
Share redemption	-	-	-36,213	-36,213
Share conversion	29,038,227	-81,274	-28,956,953	-
Bonus issue	57,840,587	-	-	57,840,587
New issue	97,754,179	-	-	97,754,179
<b>No. of shares as of Jun 30, 2014</b>	<b>197,754,179</b>	<b>-</b>	<b>-</b>	<b>197,754,179</b>

At the Extraordinary General Meeting on June 3, 2014, it was resolved to issue warrants within the scope of an employee incentive program for senior executives and key employees and to issue warrants for members of the Board of Directors. Identical terms and conditions apply to both incentive programs. In total, the incentive programs comprise of 4,949,092 warrants to a fair value of SEK 10m.

Warrants	Exercise price SEK	Expiring date	Number of warrants
Series 1	73	June, 2017	2,474,546
Series 2	79	June, 2018	2,474,546
<b>Total</b>			<b>4,949,092</b>

### Shareholders as of June 30, 2014

Prior to the IPO, NorCell S.à.r.l., indirectly controlled by funds advised by BC Partners Limited, was the principal and majority shareholder. As of June 30, 2014 BC Partners controlled 50.02% of shares and votes and Com Hem had in total 1,512 shareholders.

### Parent Company

Com Hem Holding AB (publ) is a Swedish registered limited company, (Corp. ID no. 556858-6613) with its registered office in Stockholm, Sweden. The majority shareholder of Com Hem Holding AB (publ) is NorCell S.à.r.l.(Corp. ID no. B162416) registered in Luxembourg.

### Fair value of derivatives

In order to decrease the Group's interest rate risks and currency exposure, certain derivatives have been entered into. The derivatives are measured at fair value and are recognized in net profit or loss, hedge accounting is not applied. The Group only holds level 2 instruments as described in the Group's Annual Report for 2013. Amounts of SEK 182m (101) regarding changes in fair value of the derivatives have been recognized in the financial net and SEK 0.5m (3) have been recognized in other operating income.

### Fair value of the derivatives at period end:

SEKm	Jun, 30		Dec, 31
	2014	2013	2013
Derivatives (Collar)	-	-6	-6
Derivatives (CIRS)	-2	-127	-97
Derivatives (FX contract)	65	-22	-16
<b>Financial assets/liabilities</b>	<b>63</b>	<b>-155</b>	<b>-119</b>

In connection with the refinancing, the Group terminated certain hedging contracts related to interest payments. The cost for the terminations amounted to SEK 25m. In addition the Group entered into a number of short term currency contracts to avoid the currency risk related to the Notes being redeemed on July 4, 2014.

### Acquisition of subsidiaries

On December 20, 2013 Com Hem Communications AB announced the acquisition of 100% of the shares of Phonerä Företag AB including its subsidiaries (Business segment "Phonerä Telefoni") from Phonerä AB (publ). Phonerä is a virtual full service provider of B2B communication services.

The acquisition was completed on March 31, 2014, which is also the date control exists and from when the entity is consolidated. The purchase price was SEK 311m of which all was paid in cash. The recognized value of intangible assets was SEK 318m of which customer relationships was SEK 161m and goodwill was SEK 157m.

The goodwill recognized for the acquisition relates to future revenue from new customers and increased revenue from existing customers through continued growth of the number of services sold per customer. No portion of the goodwill is expected to be tax deductible.

Phonerä contributed with SEK 65m to revenue and approximately SEK 10m to operating income excluding depreciation and amortization from the acquisition date. If the acquisition had been conducted January 1, 2014 management estimates that the contribution to the Groups consolidated revenue would have been SEK 128m and the contribution to operating income would have been approx. SEK 24m excluding depreciation and amortization.

Acquisition of Phonerä SEKm	Recognized value in the Group
Intangible assets	161
Other intangible assets	10
Other tangible assets	3
Other current assets	71
Cash and cash equivalents	9
Deferred tax liabilities	-35
Non-current liabilities	0
Current liabilities	-65
<b>Recognized assets, net</b>	<b>154</b>
Goodwill	157
<b>Purchase price</b>	<b>311</b>

On March 1, 2013, the acquisition of Ömsat, Örnköldsviks Satellit och kabel- TV AB, a local cable operator in Örnköldsvik was completed. The purchase price was SEK 13m, as described in the Group's Annual Report for 2013.

### Non-recurring items

Non-recurring items comprise one-off costs related to the listing on NASDAQ OMX Stockholm, restructuring costs related to redundancy, transaction costs connected to acquisitions, costs for launching new services and products and other similar costs.

Non-recurring items SEKm	Apr-Jun		Jan-Jun	
	2014	2013	2014	2013
IPO related costs	107	0	107	0
TiVo and B2B costs	25	21	61	27
Acquisition costs	1	0	9	0
Redundancy costs	5	11	10	41
Other costs	5	1	10	5
<b>Total non-recurring items</b>	<b>142</b>	<b>33</b>	<b>198</b>	<b>74</b>

### Pro forma earnings per share

Earnings per share have been recalculated to adjust for the high one-off costs and the significant change in the number of shares in June and July 2014, to be able to present meaningful financial key metrics for comparison purposes.

SEKm	Apr-Jun		Jan-Jun		Jan-Dec
	2014	2013	2014	2013	2013
<b>Net result for the period</b>	<b>-718</b>	<b>-279</b>	<b>-895</b>	<b>-268</b>	<b>-771</b>
IPO-related costs	107	-	107	-	-
Costs related to refinancing	573	-	573	-	-
<b>Adjustment for one-off costs<sup>(1)</sup></b>	<b>680</b>	<b>-</b>	<b>680</b>	<b>-</b>	<b>-</b>
Adjustment for tax effect	-150	-	-150	-	-
<b>Net adjustment</b>	<b>530</b>	<b>-</b>	<b>530</b>	<b>-</b>	<b>-</b>
<b>Adjusted net result for the period</b>	<b>-188</b>	<b>-279</b>	<b>-364</b>	<b>-268</b>	<b>-771</b>
No. of shares as of Jul 4, 2014 <sup>(2)</sup>	207,529,597	207,529,597	207,529,597	207,529,597	207,529,597
<b>Pro forma earnings per share, SEK</b>	<b>-0.90</b>	<b>-1.34</b>	<b>-1.75</b>	<b>-1.29</b>	<b>-3.72</b>

1) One-off costs associated with IPO and refinancing of debt.

2) Number of shares as of July 4, 2014, after exercise of over-allotment option.

### Risks and uncertainty factors

The Group and the parent company has identified a number of operational and financial risks. Operational risks include increased competition, the ability to attract and keep customers, technical development, regulatory environment and substitution from fixed to mobile telephony. Financial risks include liquidity-, credit- interest-, and currency risks. For a detailed description of the risk factors considered to be most important to the Group's future progress, please see the description in the Group's Annual Report for 2013. The Group believes that the risk environment has not materially changed from the description in the Annual Report for 2013, except for financial risks that have decreased due to the significantly reduced net debt.

As stated in the Offering Memorandum as of June 3, 2014, page 40, a government committee has reviewed the Swedish corporate and withholding tax regimes. On June 12, 2014, the government committee presented its proposal. While the changes are proposed to take effect from January 1, 2016, there is no certainty that the proposal will be adopted as law in its current state, when it would become effective or the exact impact of the proposed changes.

### Revenue expectations and medium term financial targets

*With reference to the Offering Memorandum, this section is a condensed summary of what is stated on pages 111-112 and should not be read as an outlook.*

We expect the year-on-year revenue growth rate for the financial year 2014 to be in the mid-single digits including the effect of the consolidation of Phonerä. We have a medium term target of growing the revenue of our overall business in the mid-single digits year-on-year.

Over the medium term our underlying EBITDA margin is expected to slightly soften as a consequence of a shift in our business mix, primarily resulting from the relative contribution of digital television and B2B revenue increasing with lower gross margins than our remaining business lines. Over the medium term, we expect capital expenditure as a percentage of revenue to decline to a level that is more in line with the industry average.

In the medium term, we aim to operate within a target leverage of 3.5x to 4.0x LTM underlying EBITDA retaining flexibility to distribute excess cash to shareholders in the form of dividends or other means of cash capital distributions to our shareholders.

## Definitions

### Industry terms

#### ARPU

Average monthly revenue per user for the referenced period. ARPU is calculated by dividing the monthly revenue (for the service provided, in each case including the proportional allocation of the Com Bo discount) for the respective period by the average number of unique residential subscribers for that period. The average number of unique residential subscribers is calculated as the number of unique residential subscribers on the first day in the respective period plus the number of unique residential subscribers on the last day of the respective period, divided by two.

#### Churn

The voluntary or involuntary discontinuance of services by a subscriber.

#### CPE

Customer Premises Equipment, which refer to hardware such as set-top boxes and modems located at a customer.

#### Homes connected

Homes connected represent the number of residential units to which we provide basic-TV services, primarily through long-term contracts with the landlords of MDUs or services pursuant to service provider agreements with communication operators.

### Financial key metrics

#### CAPEX

Capital expenditure in fixed tangible and intangible assets, including capital expenditure funded by leasing.

#### Consumer ARPU

Consumer ARPU is calculated by all digital-television, broadband, fixed telephony and other revenue that can be allocated to each consumer service, by the average number of total unique subscribers for the respective period, and further by the number of months in the period. The average number of total unique subscribers is calculated by aggregating the average number of unique subscribers in each month during the respective period and dividing the result by the number of months in the respective period.

#### Earnings per share

Net profit or loss for the period attributable to equity holders of the parent divided by average number of shares.

#### EBIT (Operating profit)

Operating income less operating expenses.

#### EBITDA

Operating profit (EBIT) less depreciation and amortization.

#### Equity per share

Shareholders' equity divided by total number of shares.

#### RGUs

Revenue generating units, which refer to each subscriber receiving basic or digital cable television, internet access or telephony services over our network. Thus, one subscriber who receives all three services would be counted as three RGUs.

#### Unique subscribers

Unique subscribers represent the number of individual end-users who have subscribed for one or more of our digital services. We refer to the end-users receiving our products and services directly through our network as our unique subscribers even if our billing relationship for that end-user is with the end-user's landlord or housing association.

#### Landlord ARPU

Landlord ARPU is calculated by dividing the revenue for the respective period by the average number of homes connected for that period and further by the number of months in the period. The average number of Homes connected is calculated as the number of Homes connected on the first day in the respective period plus the number of Homes connected on the last day of the respective period divided by two.

#### Net debt

Interest-bearing liabilities, net of borrowing costs, less cash and cash equivalents.

#### Net debt/Underlying EBITDA

Net debt at the end of the period indicated divided by underlying EBITDA for the last twelve months.

#### Operating free cash flow

Underlying EBITDA less Capex.

#### Underlying EBITDA

EBITDA less write downs, non-recurring costs and operating currency gains/(losses).

#### Underlying EBITDA margin

Underlying EBITDA as a percentage of revenue.



## Q2 2014 Presentation

Com Hem will host a webcasted conference call for the global financial community at 10:00 am CET on Tuesday July 15, 2014. To participate, use the link at [www.comhemgroup.com](http://www.comhemgroup.com) or dial-in numbers:

SE: +46 8 505 564 74

UK: +44 203 364 5374

US: +1 855 753 2230

## Financial calendar

Interim report, Jan - Sep 2014	Nov 4, 2014
Year-end report, Jan - Dec 2014	Feb, 2015

## Financial information

All financial information is published on [www.comhemgroup.com](http://www.comhemgroup.com) directly after release. Subscribe for press releases and financial reports via e-mail or RSS.

## Disclosure

Com Hem Holding AB (publ) discloses the information provided in this interim report pursuant to the Swedish Securities Markets Act and/or the Swedish Financial Instruments Trading Act. The information was submitted for publication at 07.30 am CET on July 15, 2014.

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## About Com Hem

Com Hem is one of Sweden's leading suppliers of television, high-speed broadband and fixed-telephony. Approximately 39%, 1.83 million, of Sweden's households are connected to Com Hem's network, with access to the market's broadest range of television services. Com Hem offers attractively priced, high-quality services for television, high-speed broadband, fixed-telephony and has a competitive B2B-offer of broadband and telephony services. Com Hem was established in 1983, has approximately 1,000 employees and its head office in Stockholm. Operations are run through three subsidiaries; Com Hem AB, Phonera Företag AB and iTUX Communication AB. The Com Hem share is listed on NASDAQ OMX Stockholm, Large Cap.

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