



WEEK 20

FRIDAY 21 MAY 2021

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THIS WEEK

- Sports betting in, iGaming out for Seminole in Florida
- GGA 2021 Chief Executive Shortlist revealed
- Entain considers William Hill assets bid
- Catena Media Q1 revenue surges

GUEST INTERVIEW:

Arcangelo Lonoce,
Head of Business
Development Europe,
Habanero

LEOVEGAS ENTERS NEW JERSEY IGAMING MARKET THROUGH CAESARS ENTERTAINMENT DEAL

See also Page 3

Good news for retail, as casinos reopen in the UK and Cyprus



OUT NOW



LeoVegas and Caesars Entertainment, two brands with rich histories and reputations, have joined forces in New Jersey's surging iGaming sector. With opportunities aplenty, just how much of the market can they grab?

▶ LeoVegas has announced an agreement with Caesars Entertainment, which will allow it to offer online casino in the state of New Jersey.

The New Jersey launch marks the operator's entry into the US market and will be accompanied by LeoVegas' technical platform, Rhino.

The platform will allow the firm to maintain full control over its product, with LeoVegas aiming to provide US customers with a competitive gaming experience.

The Rhino platform will be certified by regulatory authorities in New Jersey, while LeoVegas expects to start accepting US customers during the first half of next year.

The agreement comes not too long after LeoVegas reported an 8% year-on-year increase in revenue to €96.7m (\$116.3m) for the first quarter of 2021. The operator also recently launched its own studio, Blue Guru Games.

LeoVegas CEO Gustaf Hagman said: "We are proud to finally be able to share our plans to establish ourselves in the USA; We think the time and partner are right to launch 'The King of Casino' in the USA. The American market has immense growth potential, and players are just now discovering online gaming.

"We will focus on what we are best at, offering an innovative, world-class gaming experience directly to mobile phones. Establishing ourselves with our proprietary platform is a strategic decision; and we know from other markets that having full control over our technology is a key competitive advantage."

Additionally this week, LeoVegas completed the acquisition of Expekt and will launch the company as a new sports betting brand named 'anew.'

LeoVegas says the new brand will offer an improved gaming experience and is being launched under a different and new marketing concept.

Expekt was acquired for a total price of €5m, which includes the company's entire assets. Now the acquisition has been officially completed, allowing LeoVegas to rebrand Expekt and relaunch the company.

It hasn't all just been about LeoVegas this week, though, with Caesars Entertainment experiencing developments of its own. It closed smaller venues and ended shows in Las Vegas last week. But there was better Vegas news for the organisation, as Caesars confirmed it can now return to 100% capacity at its properties in the gaming hub.

"The expansion to full capacity and the elimination of social distancing on our casino floors in Las Vegas is a result of our Team Members' commitment to doing their part to put us all on the road to recovery," said Tom Reeg, Caesars CEO.

"We are grateful to our team members who have chosen to be vaccinated, and will continue to offer incentives and

provide easy, on-site access to vaccines for all of our team members in Las Vegas. While this shift is encouraging, we understand that the battle is not yet won, and it is through a continued commitment to health and safety that Las Vegas can most quickly rebound."

Caesars has also invested \$400m to renovate three properties across Atlantic City and New Jersey.

GI Verdict: LeoVegas continues to headline gambling news in 2021, following another year of growth and, more recently, opening its own game development studio. In the modern day, it is ticking off the staple checklist of every big-name operator, vis á vis, owning some of its own technology stack, growing in existing markets and taking on a big partnership in the US.

While it is far from a first-mover in New Jersey, LeoVegas' strong brand reputation should ensure significant enough market share. Certain brands can make waves without leading a market from the offset and we've seen as such in the US from the likes of Evolution and Entain.

"Three partnerships accounted for \$84.8m of \$107.8m in New Jersey iGaming revenue for April. But considering their respective reputations, expect LeoVegas and Caesars to add even more to the Garden State's iGaming pot of gold in due course"

For Caesars, the benefits should be plentiful as it works together with Hagman's firm. With a number of strategic partnerships already in place, and of course having acquired William Hill's US assets, the operator is well placed to help achieve LeoVegas' goal of being 'King of Casino.'

But that's not to diminish any other brands in New Jersey, of course, with the aforementioned Entain going strong with BetMGM and Borgata. As our Fantini dater later in this week's *GI Friday* also spells out, Flutter Entertainment will be hard to displace (via Resorts Digital), as well as via Golden Nugget Online Gaming. Those three partnerships alone combined to account for \$84.8m of \$107.8m in New Jersey iGaming revenue for April.

Yet considering their respective reputations, expect LeoVegas and Caesars to add even more to the Garden State's iGaming pot of gold in due course.

THIS WEEK IN NUMBERS

\$404m



Gross gaming revenue recorded by the Pennsylvania Gaming Control Board, the second consecutive record-breaking month for the state



900

Jobs to be created by FanDuel's new technology campus in Midtown Atlanta

54%



Year-on-year increase in revenue for Golden Nugget Online Gaming, with the company reporting Q1 2021 revenue of \$26.7m

AU\$1m



Expected profit before tax for Ainsworth Game Technology for the second half of the 2021 financial year

\$236m

Revenue for Louisiana's 13 riverboat casinos, one land-based casino and four racinos in April 2021



CASINOS REOPEN IN THE UK AND CYPRUS AFTER MONTHS OF CLOSURE

More than 100 casinos across England, Scotland and Wales have opened their doors for the first time this year, as of Monday 17 May.

And Cyprus Casinos (C2) has also opened up again, after six months of forced closure during the Covid-19 pandemic.

In the UK, returning customers will still have to comply with anti-Covid measures, such as using hand sanitisers, wearing face masks and social distancing.

For Scottish gamblers, casinos will close at 10:30pm and are not allowed to sell alcohol. Meanwhile, casinos in Glasgow remain closed as First Minister, Nicola Sturgeon, keeps the area under level three restrictions.

Just last month, betting shops were allowed to open in England; they were not allowed to show live sports, but from Monday this restriction has been lifted.

In Britain, casinos directly employ 11,600 people and, in the year before the pandemic, they contributed to £500m (\$705m) to the Treasury in tax.

According to an Ernst and Young report, betting shops across the UK support 46,000 jobs and pay around £1bn a year in tax.

Overall, the regulated betting and gaming industry provides the UK economy with £7.7bn.

Betting and Gaming Council Chief Executive Michael Dugher has commented: "It's great news that most of the UK's casinos are finally able to re-open and is a testament to the hard work staff have put in making them Covid-secure.

"As well as providing excellent entertainment for their customers, casinos are a major contributor to the UK economy, something which will be vital in the months ahead as the Government tries to repair the damage done to the nation's finances by Covid-19.

"I am also delighted that the restrictions imposed on betting shops are being lifted. Their safe re-opening in April has been a huge success and this is further reward for the efforts they have made to ensure their premises are Covid-secure."

In Cyprus, meanwhile, the C2 Limassol casino will open from 7am to 11:30pm local time; and Ayia Napa and Paphos will close the same time but open later at 10:30am.

The Nicosia casino will open from 3pm to 11:30pm on weekdays and 7am to 11:30pm on weekends. However, due to Ministry of Health guidelines, the Columbia Bistro in Limassol will open from June 1.

Each venue will have to meet strict guidelines set out by the Greek Minister of Health, but the company is confident it will meet requirements.

To ensure the safety of customers, the operator has set in place several health and hygiene rules across its venues, such as temperature checks, the use of face masks, and hand sanitisers and social distancing.

The operator says it will be carrying out regular disinfection and sanitisation procedures on a daily and weekly basis.

Cyprus Casinos Property General Manager, Grant Johnson, said: "We are delighted to welcome guests back to C2.

"We are ready and committed to providing them with the highest standards of entertainment offered by C2 in a safe and pleasant environment. The health and safety of our guests and colleagues is our number one priority. We have therefore implemented a comprehensive series of stringent hygiene measures.

"We strongly believe the reopening of C2 will provide a boost to Cyprus' road to recovery and contribute significantly towards enhancing the tourism industry, as well as the overall local economy".



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263%

Year-on-year
increase in revenue
for GAN Limited,
with revenue
totalling \$27.8m
for Q1 2021

AU\$346m

Net profit after tax
for Aristocrat Leisure
Limited for the six
months ended 31
March 2021



54%

Year-on-year
increase in
revenue for
Scout Gaming
for Q1 2021

FLORIDA APPROVES SPORTS BETTING FOR SEMINOLE TRIBE, BUT ONLINE GAMBLING REMOVED FROM BILL

Florida has come to an agreement with Republican Governor Ron DeSantis and the Seminole Tribe to allow the tribe to operate sports betting in the state.

After a 97-17 vote, sports betting in Florida has now been legalised and as a result, the state could gain \$20bn in tax revenue over the next 30 years.

The compact still needs to be approved by the US Department of the Interior and there might be some legal challenges for DeSantis and the Seminole Tribe.

However, earlier, House Speaker Chris Sprowls and Senate President Wilton Simpson had announced online gaming will not be part of any Florida sports betting bill.

They also revealed that Governor Ron DeSantis and the Seminole Tribe of Florida have agreed to remove the proposal, and that negotiations with the state would continue without discussing online gambling.

The deal struck by the Seminole Tribe

and DeSantis would see the tribe pay at least \$2.5bn in the first five years of a 30-year agreement.

GI Verdict: Online gaming has traditionally left policymakers' nerves uneasy in larger US states – explaining why so few have legalised online casino to date.

And yet, given the soaring success of iGaming in New Jersey, its eventual adoption looks inevitable for any state that is serious about legalised gaming.

On this occasion, there is perhaps an added caveat, with fears over a Seminole Tribe monopoly. The only way to combat a one-horse race would be to invite more operators to the fold; which naturally wouldn't benefit Seminole, while also increasing the problem gambling risks vocalised by those opposed to iGaming.

For now, though, Florida has still undertaken a huge step by legalising sports betting.

GGA LONDON SHORTLIST 2021

Jesper Svensson (Betsson Group)

Renato Ascoli (IGT)

Gustaf Hagman (LeoVegas Group)

Martin Carlesund (Evolution)

Jordan Levin (SG Digital)

Robert Chvatal (Sazka Group)

Stephane Pallez (FDJ)

Mark Locke (Genius Sports)

Itai Pazner (888 Holdings)

Henrik Tjärnström (Kindred Group)

Richard Brown (GiG)

Jesper Søgaard (Better Collective)

Per Jaldung (Casino Cosmopol)

Ebbe Groes (EveryMatrix)

Tjaša Luin Peric (Alfastreet)

Kristian Nylén (Kambi)

Mor Weizer (Playtech)

Nik Robinson (Big Time Gaming)

Tsachi Maimon (Aspire Global)

Peter Causley (Lightning Box Games)

Carsten Koerl (Sportradar)

Vigen Badalyan (BetConstruct)

Peter Jackson (Flutter Entertainment)

Dmitry Starostenkov (EvenBet Gaming)

Fredrik Elmqvist (Yggdrasil Gaming)

GLOBAL GAMING AWARDS LONDON 2021: CHIEF EXECUTIVE OF THE YEAR SHORTLIST ANNOUNCED

The Global Gaming Awards London 2021 are delighted to announce the final Shortlist for the Chief Executive of the Year category, sponsored by 1xBet.

The Global Gaming Awards are the most recognised, reputable and prestigious Awards in the gaming industry, partly because every shortlisted company is nominated for a specific reason, which is then publicly announced. Additionally, success is only achieved through a fair and rigorous voting process, ensuring deserved winners recognised by their peers.

“Chief Executive of the Year is the only Award which recognises the individual rather than the company,” said Julian Perry, COO of *Gambling Insider*. “The gaming industry kept on growing and innovating even under the difficult circumstances imposed by the Covid-19 pandemic, and it is all because of the unwavering leadership of many chief executives from both the supplier and operator verticals.”

The London edition of the event recognises companies and individuals with outstanding performance in the EMEA region over the past 12 months.

The full Shortlist will be released in the public domain in the coming days. For now, it is our absolute pleasure to share the full list of nominees in the Chief Executive of the Year category.

This is the only Global Gaming Awards category that has 25 nominees instead of 10. The nominees can be seen in full on the left-hand side of this page.

This category is sponsored by 1xBet – an operator with years of both offline and online experience, while the Global Gaming Awards London are powered by *Gambling Insider*.

BetConstruct is the event’s Lead Partner and the voting process is independently adjudicated by KPMG in the Crown Dependencies, to ensure full transparency and fairness.

This year, the event will be held virtually on 28 June.



"I'm President and Chief Commercial Officer of Strive. Max Meltzer will be CEO after he leaves Kambi this summer. Between us, we'll build out the business, take US offices and have a 24/7 client success-facing team."

Strive Gaming President Damian Xuereb's first interview is an exclusive with Gambling Insider

"We will continue to be vigilant on all fronts, including stringent cleaning regimes, safe distancing measures across property, and regular Covid-19 testing of frontline staff."

A statement from Marina Bay Sands, after it temporarily closed its doors following two positive Covid-19 tests among staff

"Everyone loved the FLIP party night we hosted during the GG Spring Festival, so to do something similar for the community during WSOP Super Circuit is a no-brainer."

Paul Burke, GGPoker Head of Public Relations, on the company's tournament in partnership with Fantastic Ladies in Poker (FLIP)

ENTAIN CONSIDERS BID FOR WILLIAM HILL ASSETS

Industry giant Entain is considering a bid for William Hill's non-US assets, months after the operator rejected a takeover bid from MGM Resorts International in January, as reported by Bloomberg.

Earlier in April, William Hill was acquired by Caesars Entertainment for around \$4bn, though Caesars and its partners are open to selling William Hill's non-US assets within 12 months to pay down a \$2bn debt.

And Entain has now emerged as a potential bidder. By acquiring William Hill's local assets, the owner of Ladbrokes and Coral will gain further market share in the UK, as well as William Hill properties outside of the UK.

However, with such a large market share, Entain could run into some regulatory issues when or if it takes over William Hill's non-American assets.

Recently, Entain took over Swedish betting company Enlabs AB, and is also exploring the option of taking assets off Australia's Tabcorp Holdings in what could be a \$2.7bn deal.

According to reports, Apollo Global

Management is also interested in William Hill's assets. Apollo and Entain are currently battling it out to land Tabcorp's gaming assets, but this is one battle where analysts feel Entain has the upper hand.

It seems the William Hill assets could launch a new bidding war between the pair though, while operator Betfred is also reportedly interested.

Betfred has a strong retail presence in the UK, while it bought a number of shops when Ladbrokes merged with Coral to help avoid a monopoly in the market. In addition, Founder Fred Done recently made a significant profit when purchasing, then selling, what were initially undervalued shares in William Hill.

GI Verdict: Whether Entain makes a move sooner rather than later remains to be seen, but this surprising news could alert other companies to speed their offers along before it's too late. Particularly interested parties are likely to be 888 Holdings and Apollo, as analyst Lee Richardson told *Gambling Insider* this week.

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SHARE PRICES COVER THURSDAY
13 MAY TO THURSDAY 20 MAY
(12:00PM)

LeoVegas
40.30 SEK



0%

Caesars
96.50 USD



2%

Entain
1,554,50 GBp



0%

Catena Media
58.36 SEK



8%

Elys Game Technology
4.52 USD



30%

CATENA MEDIA REPORTS 53% Q1 REVENUE INCREASE

Affiliate Catena Media has reported operating revenue of €40.7m (\$49.8m) for the first quarter of 2021, a 53% increase from the prior-year period.

Organic search revenue was €38.4m, a 61% year-on-year increase, while adjusted EBITDA increased by 94% to €25.1m. Earnings per share were 0.26 and 0.17 before and after dilution respectively, while operating cash flow increased by 85% to €20.8m.

New depositing customers (NDCs), meanwhile, totalled 157,546, a 32% rise from the 119,529 NDCs amassed in the prior-year period.

In its Q1 2021 report, Catena also highlighted the growth of its US iGaming operations, which rose by more than 200% to €22.4m. The company noted significant changes to the board in the period, including Göran Blomberg's appointment as Interim CEO, effective 7 January 2021, followed by Michael Daly's appointment as group CEO, effective 1 March 2021.

"I am pleased to report a very strong start to the year by Catena Media," said

Daly. "Revenue and earnings reached all-time quarterly highs thanks to exceptional performance in North America and solid gains in other parts of the business.

"This robust showing provides a springboard to achieve revenue gains during 2021 well above our target of double-digit organic growth.

"Our excellent performance reflects a solid focus on driving our global portfolio of affiliation brands. Revenue growth in North America was exceptional, supported by the successful launch of operations in Michigan and Virginia."

GI Verdict: Catena is one of a number of companies to report a huge year-on-year increase in revenue for Q1 2021, as the online industry aims to build on the tremendous year it just had.

Catena again is also one of many groups to strive for growth by announcing a major acquisition in the form of sports affiliation company Lineups.com, which it acquired earlier this month. The deal should further strengthen the affiliate's commanding position in the US.

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NJ REVENUE SOARS FOR APRIL

Entain and MGM Resorts' joint venture BetMGM continued to show strength in April as evidenced by revenue reports from states such as New Jersey.

New Jersey does not break out iGaming

operator revenue but Borgata, where BetMGM operates online casino, led with a third of total revenue.

Meadowlands, where FanDuel operates sports betting, continued to lead sports

betting share at over half.

Overall, digital revenues continued to be strong in New Jersey, though revenue fell from March as Covid-19 restrictions eased and absent of the March Madness basketball tournament.

ALL-SOURCES REVENUE

REVENUE	APRIL 2021 (M) VS. APRIL 2019 (% CHANGE)	
Resorts	\$44.965	+ 80.24
Hard Rock	\$41.856	+ 67.09
Ocean	\$25.262	+ 54.67
Golden Nugget	\$43.674	+ 48.83
Borgata (MGM)	\$78.102	+ 32.70
Caesars (CZR)	\$27.832	+ 4.54
Tropicana (CZR)	\$26.701	- 3.91
Bally's AC (BALY)	\$11.184	- 22.95
Harrah's (CZR)	\$20.775	- 23.77
Total Gaming	\$352.210	+32.72

LEGACY CASINO

LEGACY CASINO	APRIL 2021 (M) VS. APRIL 2019 (% CHANGE)		TABLE HOLD 2021 2019	
Hard Rock	\$35.232	+ 50.79	17.3	16.2
Ocean	\$22.140	+ 45.79	12.8	13.2
Resorts	\$12.959	+ 1.27	14.2	14.5
Caesars (CZR)	\$18.851	- 14.49	14.5	16.4
Tropicana (CZR)	\$19.159	- 20.25	14.4	19.1
Bally's AC (BALY)	\$10.995	- 22.37	14.0	15.7
Harrah's (CZR)	\$20.750	- 23.66	18.3	30.1
Borgata (MGM)	\$38.528	- 27.81	17.4	17.4
Golden Nugget	\$11.006	- 28.76	17.3	19.9
Total Legacy Casino	\$189.621	-8.65	N/A	N/A

MULTIPLE PROPERTIES

MULTIPLE PROPERTIES		
Caesars	\$75.056	- 7.92

IGAMING	REVENUE (M)	ANNUAL CHANGE (%)		PARTNER
		2019	2020	
Borgata (MGM)	\$32.809	+ 500.55	+ 106.76	ENT, MGM, Pala
Ocean	\$1.254	+ 306.51	+ 10.84	GAN
Hard Rock	\$5.136	+ 230.30	+ 14.54	GiG
Resorts Digital	\$19.614	+ 174.80	+ 21.68	SGMS, FLTR
GNOG	\$32.427	+ 134.05	+ 17.31	FLTR, GAN, SGMS
Caesars (CZR)	\$9.196	+ 100.83	+ 5.37	888, SGMS
Tropicana (CZR)	\$7.314	+ 98.46	+ 22.17	Gamesys
Total iGaming	\$107.750	+ 194.54	+ 34.75	N/A
Online Casino	\$105.343	+ 201.71	+ 40.81	N/A
Poker	\$2.407	+ 44.28	- 53.26	N/A

SPORTS BETTING

SPORTS BETTING	REVENUE (M)	PERCENTAGE CHANGE		OPERATOR
		2019	2020	
Borgata	\$6.765	+ 27,221.66	+ 8,520.16	Entain
Hard Rock	\$1.489	+ 1,038.72	+ 3,292.13	GiG
Golden Nugget	\$0.240	+ 513.18	N/A	DKNG/CHDN
Tropicana	\$0.228	+ 196.10	N/A	CZR
Resorts Digital	\$12.000	+ 151.74	+ 1,885.53	FLTR/DKNG/Kambi
Meadowlands	\$29.138	+ 140.48	+ 1,688.50	FLTR, PBH
Ocean	\$1.868	+ 123.01	+ 2,048.97	CZR
Resorts	\$0.392	+ 59.59	N/A	DKNG
Monmouth Park	\$2.389	- 6.39	+ 1,212.10	CZR/Rush St
Bally's	\$0.189	- 46.33	+ 838.45	SGMS/888
Harrah's	\$0.025	- 65.97	N/A	SGMS
GNOG	\$0.203	N/A	N/A	N/A
Freehold	\$0.128	N/A	N/A	Greenwood
Caesars	(\$0.215)	N/A	N/A	N/A
Total Sports Betting	\$54.839	+ 158.48	+ 1,981.94	N/A
Same Store**	\$54.926	+ 158.89	+ 1,985.23	N/A

*Total Casino includes land-based and online casino

**Same store excludes Freehold Raceway, which began operating in September.

GUEST INTERVIEW



ARCANGELO LONOCE
*HEAD OF BUSINESS
DEVELOPMENT
EUROPE, HABANERO*

Which European markets are you expecting the most from in terms of player activity and engagement this summer?

Italy is right up there. We have a most extensive reach among most operators in the market, and our games are well-loved by Italian players, who have a passion for sport that bodes well for the Euro 2020 casino cross-sell.

We also have further engagement tools, promotions and in-game features to be announced soon enough, all of which will showcase the cutting-edge tech for which we are renowned. We're also expecting markets where football is especially popular to respond particularly well – during what will be an action-packed summer for fans. Safe to say, we'll be making the most out of the opportunities that arise.

Which of your markets are the most challenging to target at the moment, and how much has new regulation impacted this?

Travel and social restrictions have made it difficult to expand in those markets where we had not yet made an impact prior to the pandemic. We might have reached such markets, but we have not been able to maximise our presence there the way we planned to. Having said that, our tireless work during the previous two years has seen us open up record numbers of new outlets and the results have been tremendous. The pipeline looks fantastic, and we look forward to being able to showcase our catalogue face to face – and make significant connections the way we used to.

When it comes to regulation, in general it hasn't had too much of an impact. Gaming taxation is something to keep an eye on, holding the potential to significantly affect the development of games and RTPs, specifically in Germany. Aside from that – it's very much the job for suppliers to be as

pro-active as they can in helping their operator partners be flexible and deal with such challenges as they arise.

Given the expected traffic for Euro 2020, how many new sports bettors can we realistically expect to become new slots players too?

Euro 2020 will happen in unprecedented conditions. Retail has been shut down for a long time now and recruiting a new group of players over the last year-and-a-half has been a welcome challenge for the online sector. This means the cross-selling campaigns we will see in action will speak to a whole new audience whose behaviour we all are tremendously curious to find out more about.

Such players have become accustomed to land-based marketing, and how they respond to digital outreach remains to be seen. One thing's for sure – it will be fascinating to observe it at play. I'm sure our operator partners have plenty up their sleeves for driving interest this summer – and with the promotional products we have alongside, I'm really excited to see the action kick-off and I look forward to analysing whatever data comes our way.

Is Habanero planning any differently for the summer ahead given some national lockdowns are ending?

We're looking forward to seeing what suppliers and operators have ready to deploy, because those who adopt the right strategy could be onto a winner. Europe especially, with lockdowns ending now, offers a real chance at defining a new landscape.

As an online provider, the challenge of retaining newly acquired land-based audiences during that sector's reopening is one we relish, because those players have essentially been forced online by circumstances.

It's our job to now really retain their interest with products that can both engage and excite, and show that we can deliver something different and equally exciting; even with arcades and retail establishments open again. It will be down to operators, too, to offer a true omni-channel experience where a customer can enjoy our services under a seamless framework and feel valued and recognised, be it in the shop or at home on the sofa. This coming summer will surely be a time of discovery and opportunities.

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