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# WEEK 28 FRIDAY 16 JUL 2021

THE BIG DEBATE: WHAT'S THE GAMBLE IN ADVERTISING?



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# THIS WEEK

- Las Vegas Sands looking into digital
- Wimbledon tennis matches under investigation
  - Advent International looking at William Hill
  - Cybersecurity attacks increase during Euro 2020

#### **GUEST COLUMNIST:**

 Malte Hegeler, Head of Product Development, OddsMatrix

pario

# WEEK 28 FRIDAY 16 JUL 2021

THE BIG DEBATE: WHAT'S THE GAMBLE IN ADVERTISING?





As more and more questions about gambling advertising are asked in the UK, *Gambling Insider* takes a look at whether there is a genuine case for advertising to be curbed – or even banned

To what extent does gambling advertisement increase the rates of gambling addiction and what is the difference between a responsible gambler and an addict? When does the pin drop that makes us or others realise that our enthusiasm for something is overcoming actual pleasure and turning into a problem? And the big question: should gambling advertisements be banned worldwide?

Advertising in gambling has been a topic of conversation for years among politicians and gambling companies alike, especially succumbing to scrutiny as England entered (and sadly left) the Euros. The debate on whether responsible gambling is being regulated lingers in the air, unanswered. Advertising of any kind has a price to pay in subconscious subjection – but is it so bad that the UK must go down the same routes as Italy and Belgium as to prohibit gambling advertisements altogether? The global online gambling market was declared a \$66.72bn (£48.19bn) industry in 2020, with a projection to grow to \$74.17bn in 2021 and \$158.20bn by 2028. As a certified business, doesn't a gambling company deserve the right to advertise just like any other?

The increase in young adults participating in online gambling during Covid-19 (coronavirus) surged. Data from the Gambling Commission showed that online virtual sports betting increased by 88%, with a 53% increase in online poker players compared to the previous year. The industry has since been booming; live casino provider Evolution secured a 105% increase in Q1 2021 revenue, reaching €235.8m (\$284.7m) in comparison to the (still impressive) €115.1m gained in the first quarter of 2020.

But should there be a ban on gambling advertisements to stop problem gambling?

Earlier this month, Crown Resorts was alleged to have allowed a woman to gamble for 96 hours straight, playing baccarat, sleeping at the machines while loan sharks patrolled the premises. There were no objections or interference to this obvious display of irresponsible gambling. Monitoring this behaviour is a responsibility of any casino, not an affiliation with the ramifications of an advertisement. A ban in advertisements won't adhere to a change in these decisions. If you want to gamble, you'll gamble, advertising or not.

Gambling advertisement legislation is seemingly becoming the new normal, with countries outside the European Union considering implementing changes. A ban is, theoretically, considered to reduce problem gambling. But why should gambling specifically be targeted to this degree when there are two very important addictions that could hinder a person's life far more than gambling – or even equally? Especially when the link between advertising and problem gambling is backed up by so little tangible evidence.

So, let's talk about alcohol. The joys of alcohol. It's surely

got to be the go-to legal substance at the forefront of most people's entertainment, hasn't it? But why is it considered a safe substance and only deemed serious when prescribed professionally as an addiction. Alcohol, when consumed irresponsibly, subsequently leads to an utterly self-destructive physical, mental, social and economical demise, not dissimilar to the losses of a gambling addiction. According to the National Survey on Drug Use and Health (NSDUH), 14.5 million people in the US aged 12 and older had an Alcoholic Use Disorder (AUD), alongside an estimated 586,780 (reported) dependent drinkers in England. But lo and behold we stop promoting our beloved Smirnoff Vodka or glistening pint of Peroni in a marketing company's half-hearted attempt at a witty television advert, or sprawled across one out of three bus stops, sending subliminal messages that 'It's five o-clock somewhere.'There aren't those types of propaganda advertisements for gambling anywhere, so why does the alcohol sector get a free pass?

Everyday advertisements mainly consist of cosmetics, technology or food... fast food to be exact. One night the same advert for Domino's Pizza was played, on the same channel, four times. If that were to have been four gambling adverts, the channel would soon be slandered for inappropriate advertisement. However, four forty-minute clips sensationalising an internal rising hunk of dough, at 290 calories a slice (and between 2,500-3,000 per pizza), erm, food for thought, anyone? Surely these fast food advertisements aid to the ever-expanding (excuse the pun) problem of obesity, unknowingly this screams: 'Sign yourself up for hypertension, high cholesterol and type two diabetes, now!' With the US adult obesity rate standing at 42.4% and the UK firmly slotted as the sixth-fattest nation in the world, that's pretty harmful advertising, wouldn't you say?

Moreover, under those circumstances, shouldn't advertisements for anything remotely influential be banned altogether?

Does the advert create the addiction – or in this case, the problem gambler – or is it the actions of an individual thereafter? Should it be the responsibility of casinos – like Crown – to take accountability rather than just blaming advertisements, or should the UK ban advertisements on anything addictive entirely?

Direct advertisements for gambling companies may increase the subliminal thoughts of an individual toward an inclination to gamble; however, this could be said with all advertisements promoting any consumer product or experience. Advertising, as a marketing tool, is solely used to remind the world of a business or a brand. It is uniquely down to an individual's prerogative with what they wish to do or how they act upon subjection. As gambling regulations look likelier to take place in the UK, time will tell if they will ever really have an impact on problem gamblers at all...



# THIS WEEK IN **NUMBERS**

\$246.3m

In June wagers for Indiana sportsbooks, a 3% drop from May



\$2m



Debt for Imperial Pacific International, with the company's vehicles and casino gaming machines ordered to be seized and sold by the US Federal Court

16%

Increase in Macau's gross gaming revenue for 1-11 July, compared to the last 10 days of June





\$73m

In gaming handle for TheScore for Q3 2021

2024

The year SkyCity is targeting to complete its New Zealand International Convention Centre project, despite agreeing to extend the long stop date from 2 January 2025 to 15 December 2027



# FLUTTER ANNOUNCES ODDSCHECKER SALE; APPOINTS HOWE AS INTERIM CEO OF FANDUEL

Flutter Entertainment has announced both the sale of Oddschecker, and the appointment of Amy Howe as Interim CEO of FanDuel Group.

Flutter has agreed to sell Oddschecker Global Media to Bruin Capital for a total of £155m (\$215.2m), with the transaction expected to close in the third quarter of 2021.

The Irish bookmaker will receive £135m in cash upon completion, with a further deferred contingent consideration of up to £20m.

Toby Bentall, CEO of Oddschecker Global Media, said Bruin would provide a broad international network, saying the company has an "excellent track record of building business, and valuable experience in the global sports, media, entertainment, marketing, and technology sectors."

Bentall added: "Looking forward, we have exciting opportunities both in the UK and internationally, especially in the US, where the liberalisation of online gambling legislation has created a highly attractive market for our business.

"Today's transaction brings in Bruin Capital as our new owner, who will support us in the exciting next phase of our development."

Bruin Founder and CEO George Pyne commented: "Oddschecker Global Media is a dynamic company with tremendous potential.

"The team has deep, fact-based intelligence, and experience with the mindset and needs of bettors at every level.

"There are strong links between Oddschecker's UK development and its opportunity in the US, where the marketplace is very fragmented, and discovery and customer acquisition experts will be highly sought-after."

According to Barclays Research, Oddschecker handles 260 million odds updates per day.

It influences as much as 10% of all UK bets, which correlates to around £3bn worth of stakes.

Bruin, meanwhile, is already invested in various sports-related ventures, including media producer Deltatre and marketing firm TGI Sports. Founded in 2015, Bruin is an investment and operating company that "specialises in working with capital partners and management teams to build best-in-class, global sports, media, entertainment, marketing and technology companies."

Flutter has also appointed a new Interim CEO for its US division, FanDuel, with Amy Howe taking over from the departing Matt King on a temporary basis – as the search for a permanent successor continues.

King gave his notice of intention to leave the group on 12 May 2021, and will leave on 16 July following a short transition period.

Howe will take on the role alongside her existing position as President. She joined the company in February earlier this year from Live Nation Entertainment, most recently serving as Global Chief Operating Officer of Ticketmaster.

"Matt leaves the business in a position of strength and we wish him well for the future," said Flutter CEO Peter Jackson.

"The appointment of Amy, working alongside the wider FanDuel leadership team, will support the key focus on growing the business and retaining our No 1 position in the US market."

**GI Verdict:** There is clearly huge potential in the rapidly growing US market for Oddschecker, which has already proved how dominant it can be in the UK. It will be looking for similar success across the Atlantic in the near future.

King's presence at FanDuel, meanwhile, will certainly be missed, with the executive having led the company to huge success in recent times. But Howe brings a wealth of industry experience to the role, at least until a permanent successor can be found to occupy the position for a lengthy period of time.

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# \$10m



Contributed by both FanDuel and DraftKings to Florida Education Champions, a political action committee behind a ballot initiative to legalise sports betting in the state

# \$106m

In June adjusted gaming revenue for Detroit's three commercial casinos



18



People arrested by police in Thailand for illegal online gambling, the latest raid amid a spike in illegal gambling activity in the country

### LAS VEGAS SANDS TO EXPAND INTO DIGITAL GAMING

Las Vegas Sands (LVS) plans to expand and invest in digital gaming technologies, focused primarily on the business-to-business space.

LVS is building a new digital gaming investment team, which will be led by Davis Catlin, who led an investment firm for more than a decade and has experience in both public and private aspects of digital gaming.

LVS CEO Robert Goldstein said: "Sands is determined to grow its leadership position within the industry and is committed to doing that through strategic steps we think best position the company for future growth.

"Digital gaming and other related offerings are still very much in the early stages of development, and we believe there is an outstanding opportunity for us to invest in the technologies being developed."

Goldstein stressed that the operator is willing to make this into a long-term investment; he added that such branching out should "deliver

significant returns for the company and its shareholders."

Earlier this year, the company sold its Las Vegas properties for \$6.25bn and shifted focus towards the Asian market, saying Asia was the backbone of LVS, due chiefly to the success of the operator's venues in both Macau and Singapore.

With the newly available funds, the organisation has said it is interested in new investment opportunities, including iGaming and similar digital endeavours.

**GI Verdict:** With the US online market continuing to surge, it is no surprise businesses are reacting and growing themselves. With legalised sports betting available in a huge number of American States and real-money online casino gaming legal in a handful, too, the move from LVS makes sense.

Naturally, though, the pivot is only possible following the passing away of Sands' late founder Sheldon Adelson, who was famously opposed to online gambling.



#### THE WEEK IN QUOTES

"We are convinced that this long-term alliance between both companies will allow us to grow together and achieve important goals. We could not have found a better travel companion in our expansion journey in Mexico than the Rayados de Monterrey Football Club."

Alberto Telias, CMO of Codere Online, after the company strengthened its partnership with the Monterrey Rayados Football Club by becoming the team's main sponsor

"This is a momentous day for AESE and an opportunity to focus on growing the business in exciting and innovative ways. Congratulations to Adam Pliska and his entire team at World Poker Tour as they too move into a new, successful chapter."

Frank Ng, CEO of Allied Esports Entertainment, after the company announced the sale of World Poker Tour to Element Partners

# TWO WIMBLEDON MATCHES UNDER INVESTIGATION FOR POTENTIAL MATCH FIXING

At least two matches from Wimbledon 2021 are currently being investigated for potential match fixing.

The investigations come after irregular betting patterns involving one singles match and one doubles match in this year's tournament in London. It is believed several betting firms have reported the matches due to a series of abnormal bets, the exact details of which have yet to be made clear.

The first match involving possible manipulations was a first-round men's doubles encounter, with numerous betting firms noticing high live bets that the favoured duo would be defeated. The pair won the opening set, thus increasing the odds on their defeat, before losing the remaining sets. The timing of the bets and the sums placed indicated irregularities.

The second match under investigation is a first-round singles match involving a German player, where a five-digit sum was placed at the end of the second

set on the exact result. There were also special bets on the number of service games in the match, with both bets winning.

It is, however, the opponent of the German player that has triggered suspicion. The International Tennis Integrity Agency (ITIA), the body in charge of evaluating potential matchfixing in the sport, cannot comment on individual cases due to operational reasons, with the cases not made public until a full investigation has taken place.

**GI Verdict:** Match fixing and illegal betting operations have been on the rise as of late; with tournaments in tennis, cricket and football, the summer of sport has created an unwanted problem for local authorities.

Fortunately, in terms of match-fixing there are several security systems in place for bookmakers, ones that are capable of using sophisticated algorithms to highlight irregular betting patterns. We wait to see the outcomes of these investigations.





"It's really important to understand that it is not simply a regulator but they will have a public health remit as their primary focus in every decision and recommendation they will make."

Minister of State for Justice James Browne on Ireland's gambling regulator, which is expected to be in place by the end of 2021.

"If this film helps just one other person affected by the issue of problem gambling, it's been worthwhile."

Former footballer and reformed gambling addict Paul Merson on his new BBC documentary

### **ADVENT INTERNATIONAL ENTERS WILLIAM HILL AUCTION**

US private equity firm Advent International has announced its interest in William Hill's UK and European assets.

It is believed Advent is willing to compete with private equity rival Apollo Global and online gambling operator 888 Holdings.

There are 1,400 William Hill betting shops on offer after Caesars Entertainment took over the company in a £2.9bn (\$4.04bn) deal.

Shortly after the takeover, Caesars decided it was not interested in the non-US assets of William Hill and opted to sell this part of the business once the acquisition was complete.

According to The Times, industry experts are betting on Apollo as the favourite to win the William Hill assets, as the company has previously expanded in gambling markets. However, Apollo has lost out on a number of other deals recently.

But Advent, on the other hand, has no previous agreements with gambling

companies and is yet to invest in this sector, making Apollo the more viable option. There is still 888 to consider, though, leaving an open race.

It seems as time passes, more firms are revealing their curiosity in the William Hill auction, and with Caesars pushing for a sale by the end of 2021, more bidders may announce their interest.

**GI Verdict:** As stated, William Hill's assets will likely gain more interest as time passes. The potential sale of the European assets is deemed to be lucrative by companies in and out of Europe.

The winner of this race will certainly be able to claim an important victory; from now till the end of 2021, you can expect fierce competition. This does make you realise how much Caesars stands to gain from William Hill's US operations alone, after deciding to sell a part of the company that is garnering such heavy interest.



## TAKING STOCK

SHARE PRICES COVER THURSDAY 8 JULY TO THURSDAY 15 JULY (11:00AM GMT)

**Elys Game Technology** 3.63 USD



12%

Las Vegas Sands 50.12 USD



**Flutter Entertainment** 12,305 GBp



5%

**Bally's Corporation** 49.51 USD



1%

**Score Media and Gaming** 15.99 USD



**7**%

#### **ONLINE BOT ATTACKS INCREASED BY 96% DURING EURO 2020**

Research from cybersecurity company Imperva shows bot traffic on sporting and gambling sites increased before and during Euro 2020.

The research shows bot activity on global betting and gambling sites increased 96% year-on-year in the weeks before the tournament, while it increased by 26% in April alone.

The week before England and Scotland kicked off their campaigns was "heavily targeted" by bot operators; days when England played were "particularly high risk, with account takeover attacks."

Account takeover attacks are designed to break into accounts and obtain bettors' digital wallets; these increased by two or three times when England played compared to other days.

The UK was not the only target, with bot traffic also increasing on German sites; there was a spike of 41% in the week following Germany's victory over Portugal.

Imperva Research Labs said there was "a pattern of attacks getting larger as the tournament progressed with a notable

peak occurring on 26 June, which marked the start of the Round of 16."

Edward Roberts, Director of Strategy, Application Security at Imperva, said:

"Euro 2020 is the first major international tournament where, thanks to Covid-19, typical revenue sources such as ticket scalping have disappeared.

"As a result, bot operators have reengineered their tactics to target the rest of us watching at home instead. With so many people loading up their accounts with hefty sums, gaining access is an easy money source for criminals, especially VIP customers who tend to stake huge wagers."

GI Verdict: The Euro 2020 campaign reached a disappointing conclusion for English fans, but it seems their plight may have been worsened by cyberattacks to their gambling accounts.

The final between England and Italy was considered to be the most watched TV event in UK history; if you take into account the amount of viewers that may have placed bets, it shows you the gravity of the potential problem.

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#### **REVENUE REPORTS: IA - JUNE**

lowa's June gaming revenue rose 24.34% to \$149.946m vs. 2019 and 31.06% over last year when they operated at 50% capacity.

Sports betting revenue soared 1,257% to \$8.425m. Retail revenue was negative last year due to Covid-19 closures. Online sports betting revenue jumped up 863.94% to \$6.382m.

There is no 2019 comparison because sports betting had not yet launched.

MULTIPLE PROPERTIES	REVENUE (M)	PERCENTAGE CHANGE VS. 2019 VS. 2020		
Wild Rose	\$10.760	+50.78	+9.54	
Elite	\$27.202	+43.44	+7.58	
Boyd	\$16.832	+27.11	+9.74	
Caesars	\$37.366	+17.29	+37.61	

ALL-SOURCES REVENUE	REVENUE (M)	PERCENTAC VS. 2019	GE CHANGE VS. 2020
Wild Rose - Jefferson	\$4.027	+70.73	+46.94
Rhythm City (Elite)	\$9.385	+52.08	-3.68
Wild Rose - Clinton	\$3.560	+44.47	+7.07
Riverside (Elite)	\$10.985	+43.04	+12.10
Wild Rose - Emmetsburg	\$3.173	+37.15	+101.86
Grand Falls (Elite)	\$6.832	+33.61	+24.43
Diamond Jo Worth (BYD)	\$9.246	+28.10	+30.09
Hard Rock	\$7.827	+27.27	+38.20
Diamond Jo Dubuque (BYD)	\$7.586	+25.93	+30.22
Catfish Bend	\$4.104	+25.76	+4.83
Isle Bettendorf (CZR)	\$6.026	+20.24	-4.35
Prairie Meadows	\$20.162	+20.15	+108.37
Isle Waterloo (CZR)	\$8.310	+19.43	+31.42
Horseshoe (CZR)	\$16.684	+17.89	+19.74
Ameristar (PENN)	\$15.096	+15.31	+24.22
Harrah's (CZR)	\$6.345	+10.63	N/A
Q casino	\$4.574	+10.39	-2.59
Terrible's Lakeside (Affinity)	\$4.307	+4.25	-5.34
Casino Queen Marquette	\$1.717	-6.22	+6.55
Total	\$149.946	+24.34	+31.06
Total, Excluding Sports Betting	\$141.521	+17.35	+24.37

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# **DATA CENTRE**



SPORTS BETTING REVENUE	REVENUE (M)	PERCENT VS. 2019	OPERATORS
Diamond Jo Dubuque (BYI	) \$1.329	+88,995.80	FLTR
Wild Rose - Emmetsburg	\$0.649	+33,423.89	CZR
Wild Rose - Clinton	\$0.720	+7,129.34	CZR
Catfish Bend	\$0.351	+4,411.89	FLTR/MGM/ENT
Ameristar (PENN)	\$0.578	+1,946.19	PBH
Terrible's Lakeside (Affinity Gaming)	\$0.146	+1,220.91	Betfred
Wild Rose - Jefferson	\$1.175	+833.82	CZR
Hard Rock	\$0.114	+557.79	Elite
Q casino	\$0.071	+415.71	CZR
Grand Falls (Elite)	\$0.163	+411.56	Elite
Isle Waterloo (CZR)	\$0.360	+365.84	CZR
Isle Bettendorf (CZR)	\$0.185	+342.20	DKNG / RSI
Rhythm City (Elite)	\$0.162	+208.36	DKNG
Prairie Meadows	\$0.649	+184.19	CZR
Riverside	\$0.075	+113.53	N/A
Diamond Jo Worth (BYD)	\$1.262	N/A	DKNG / RSI
Horseshoe (CZR)	\$0.363	N/A	N/A
Harrah's (CZR)	\$0.073	N/A	SCR
Total Revenue	\$8.425	+1,257.20	N/A

#### **HANDLE**

Total	\$111.177	+774.64	N/A



### **GUEST COLUMNIST**



**MALTE HEGELER** 

HEAD OF PRODUCT DEVELOPMENT AT ODDSMATRIX — EVERYMATRIX

Hegeler looks at a number of sports and esports that have fresh potential for engaging bettors across Europe

During the long-awaited Euro 2020 mania, we were reminded that football is indeed king – in the stadiums, as well as in the online and offline sports betting shops.

The predicted turnover: €1bn (\$1.18bn) per match across the tournament. A dizzying amount and event: making it easy to forget there are other sports around the world.

But operators with a keen eye for opportunities – and a knack for scoring good business – know not to lose sight of other sports with great betting potential.

After all, 35% of the total placed bets – according to data from the OddsMatrix sportsbook platform – come from sports and events not connected to the beautiful game.

With that in mind, we have profiled five alternative sports and esports we believe show the biggest betting potential in Europe in the months and years to come.

#### FIFA

The pandemic coincided with esports generally enjoying a massive boost in popularity.

Esports betting grew 40 times over early last year and those bettors have remained. As things stand, esports revenues are seven times higher than they were pre-pandemic and bettors are served with round-the-clock, streamed coverage.

FIFA, in particular, presents fantastic opportunities for operators: it is as easy to understand as its real-life counterpart and with short matches there is a quick turnover.

Incredibly, FIFA's rapid rise has seen it become the third-most popular sport on the OddsMatrix platform.

"Esports betting grew 40 times over early last year and those bettors have remained. As things stand, esports revenues are seven times higher than they were pre-pandemic"



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SCCG Management is a consultancy that specializes in sports betting, iGaming, sports marketing, affiliate marketing, technology, intellectual property protection, product commercialization, esports, capital formation, M&A, joint ventures, casino management, and governmental and legal affairs for the casino and iGaming industry.



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BRAZIL Client Support Team

#### NBA2K

NBA2K enjoys a similar advantage to FIFA over classic esports titles in that there are no barriers to understanding it for regular sports fans.

The NBA, packed with iconic players, is particularly popular with younger fans who tend to identify with stars rather than teams. All those recognisable players are present in the game and the number of events being streamed has exploded.

NBA2K occupies the seventh spot on the OddsMatrix sports betting leaderboard.

"FIFA, in particular, presents fantastic opportunities for operators: it is as easy to understand as its real-life counterpart and with short matches there is a quick turnover. Incredibly, FIFA's rapid rise has seen it become the third-most popular sport on the OddsMatrix platform"

#### CS:GO

CS:GO is the most established esports discipline, and it can be thrilling to watch players hide, seek, attack and ambush. With a vast, dedicated fan base, particularly concentrated in northern and eastern Europe, CS:GO contains a huge array of betting options, with BetBuilder and player markets starting to enter the mainstream.

Overall, our esports offering has hugely expanded in the past year, going from 1,000 to 50,000 live events within a couple of months, and CS:GO markets have been a roaring success with betting brands.

Those looking for the next big thing could do worse than look towards Valorant, a rising star which combines the best elements of first-person shooter (FPS) and multiplayer online battle arena (MOBA) game types.

#### **Basketball**

Estimated to be the third-most popular sport in the world with 2.2 billion fans, basketball doesn't begin and end with the NBA.

The Turkish Airlines EuroLeague competition is one of the biggest global indoor sporting competitions, with average crowds of more than 8,000 and in countries such as Greece,

Turkey and Spain, basketball is behind only football in popularity.

From a betting perspective, our BetBuilder product contains numerous basketball markets, including player props, and we have seen that Asian competitions that take place in the Europe during the daytime are very popular.

With frequent in-play betting opportunities, this lightning-fast sport just keeps on getting bigger – a little bit like the players!

#### American Football

The appeal of the NFL for European bettors keeps on growing, and the Super Bowl remains the biggest yearly betting event on the planet.

Fan engagement is in full bloom across the continent, never more so than when NFL matches are held in London and (soon) Germany.

There are said to be 2.37 million NFL fans there where, along with Poland and Spain, the new European League of Football is currently taking place.

American Football is of great interest to operators due to the wide range of player prop and micro-markets than can be offered, in a stop-start sport that contains an abundance of betting pit stops for customers.

The discipline's appeal has not been ignored by OddsMatrix, either, and during 2021 the BetBuilder product will also be available for USA's favourite sports.



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