



Nasdaq : JG

2026 Q1 EARNINGS PRESENTATION

May 26, 2026



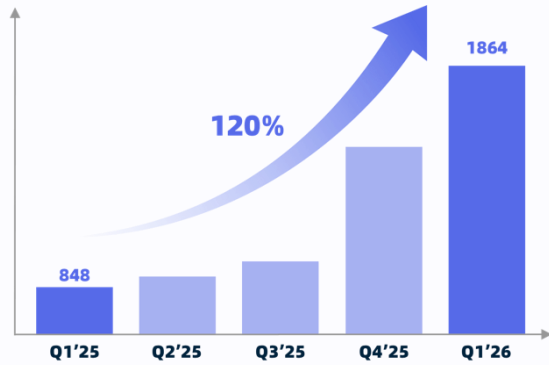


Part 1

2026 Q1 Business Highlights

Our International Business (EngageLab)

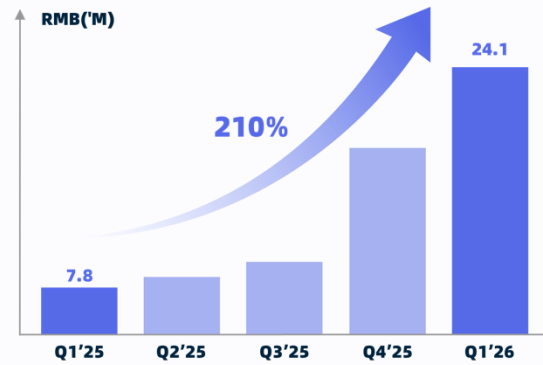
Customer Numbers:



Customer Numbers

- EngageLab continues to deliver strong growth; customer numbers increased by **120% YoY** and **14% QoQ!**

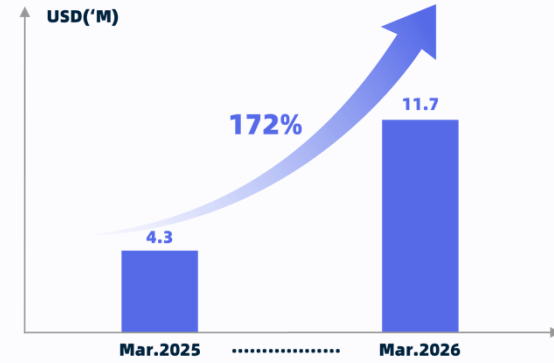
Revenue:



Revenue

- The Q1'26 revenue reached **RMB 24.1M**; increased by **210% YoY** and **31% QoQ** (from **RMB 7.8M** in the same period last year)

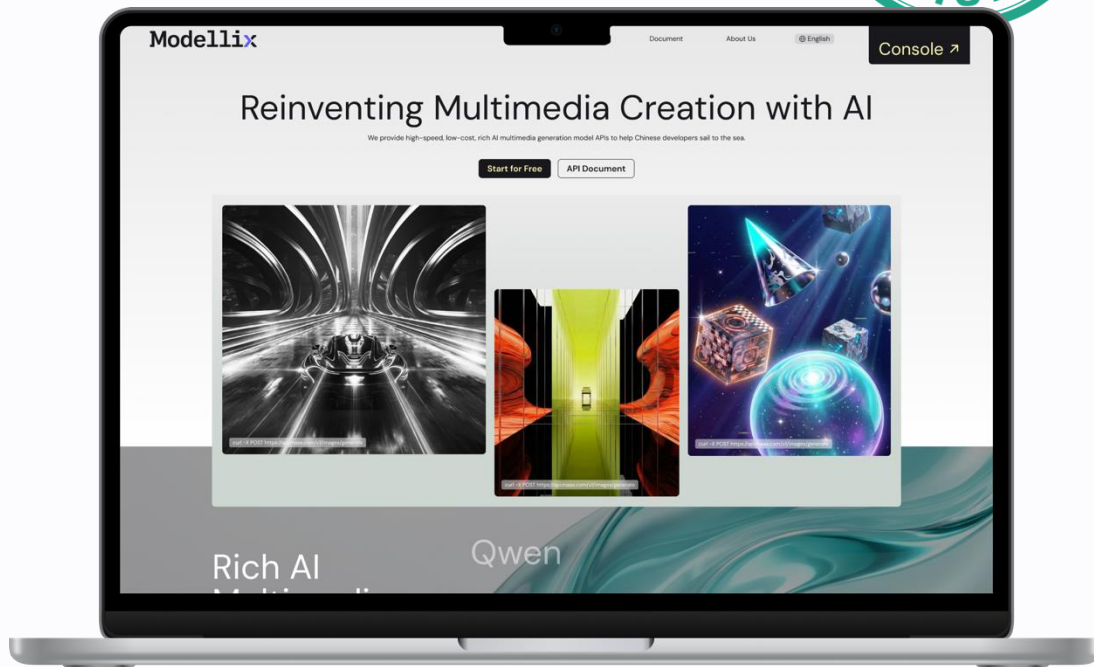
Annual Recurring Revenue (ARR):



ARR - Explosive Growth!

- In Mar' 26, the ARR reached **USD 11.7M!**
- **Increased by 172% YoY**

Modellix- A Unified Multimodal AI Platform



- We launched the new product, Modellix, a **unified multimodal AI platform** that provides a seamless, standardized bridge to global elite image and video models, transforming fragmented AI capabilities into scalable business innovation
- By standardizing request structures and simplifying model parameters, the platform lowers the overhead of managing multi-vendor API keys, vendor switching and complex nested inputs
- Modellix also offers **transparent billing, full call logs, and stable, secure developer services**, enabling more efficient integration, management and scaling of AI media applications

Strategic Market Expansion into Japan



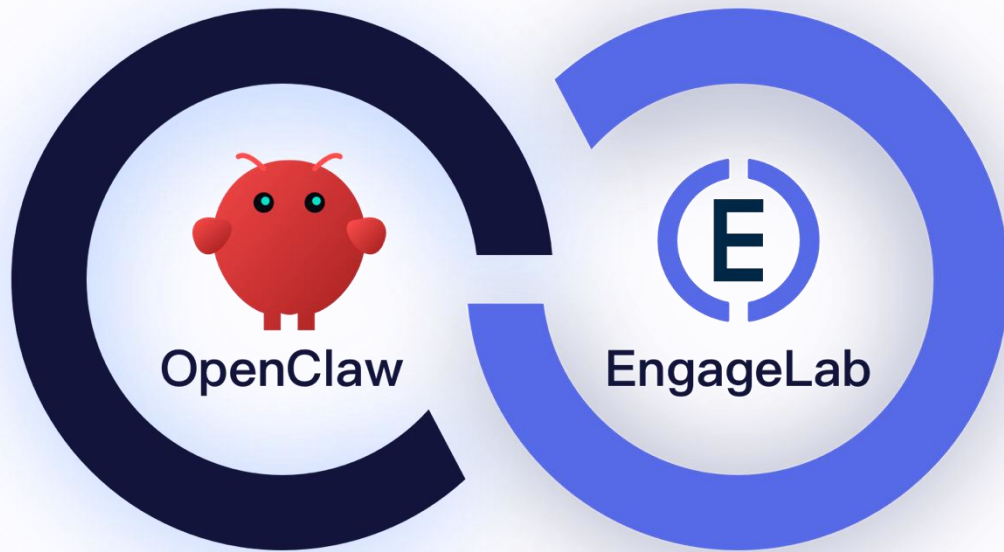
- We officially established our **Japanese subsidiary**, Aurora Mobile Japan K.K., in March 2026
- This strategic expansion brings the Company's flagship platform, EngageLab, directly to the Japanese market
- By establishing a **local presence**, Aurora Mobile Japan K.K. is poised to empower enterprises with a **Full-Journey AI Engagement ecosystem** that seamlessly integrates **Omnichannel Interaction**, **Customer Service AI Agent**, and **Frictionless Security**

Cross-Industry Collaboration with More Leading Enterprises



- We continued to deepen our multi-industry cooperation layout and established partnerships with well-known enterprises including **Xiaoe**, **Echosens China**, **Blurams**, **China Post Securities**, **Hong Kong Ants Asia Forge** and the **Shenzhen Stock Exchange**
- These collaborations have demonstrated that our products feature cross-industry universal adaptability, capable of meeting the digitalization and AI interaction needs of diverse industries

EngageLab and OpenClaw



- EngageLab officially released **EngageLab Omni Connect** in March 2026 — a purpose-built Skill for the OpenClaw ecosystem — equipping AI Agents with out-of-the-box, global omnichannel communication capabilities
- In practice, enterprises can rapidly build dedicated AI Agents for marketing, customer service, and operations on OpenClaw, then activate global omnichannel communication capabilities — including email, SMS, voice, and WhatsApp — with a single click through the EngageLab Omni Connect Skill
- Combined with user profile data, these agents can deliver **personalized, automated outreach across the entire customer lifecycle**

Part 2

2026 Q1 Financial Highlights

Group Revenues - Defined

Developer Services

- Subscription
- Value-Added Services



Vertical Applications

- Market Intelligence
- Financial Risk Management





Strong Operational and Financial Performance

01

Q1'26 – recorded **GAAP NET INCOME**. A great start to 2026!!
Making it 4 consecutive quarters in a row!!

02

EngageLab (our global flagship product):

- The recognized revenue increased by **210% YoY** and **31% QoQ**;
- **ARR** reached **USD 11.7M**. **Explosive YoY growth of 172%!**

03

Total Q1 revenue reached **RMB 93.3M**, with a **YoY growth of 5%**



Strong Operational and Financial Performance

Developer Services (Subscription) revenue **continued to scale new heights**;
hitting an all-time high of **RMB 64.9M** in Q1'26

04

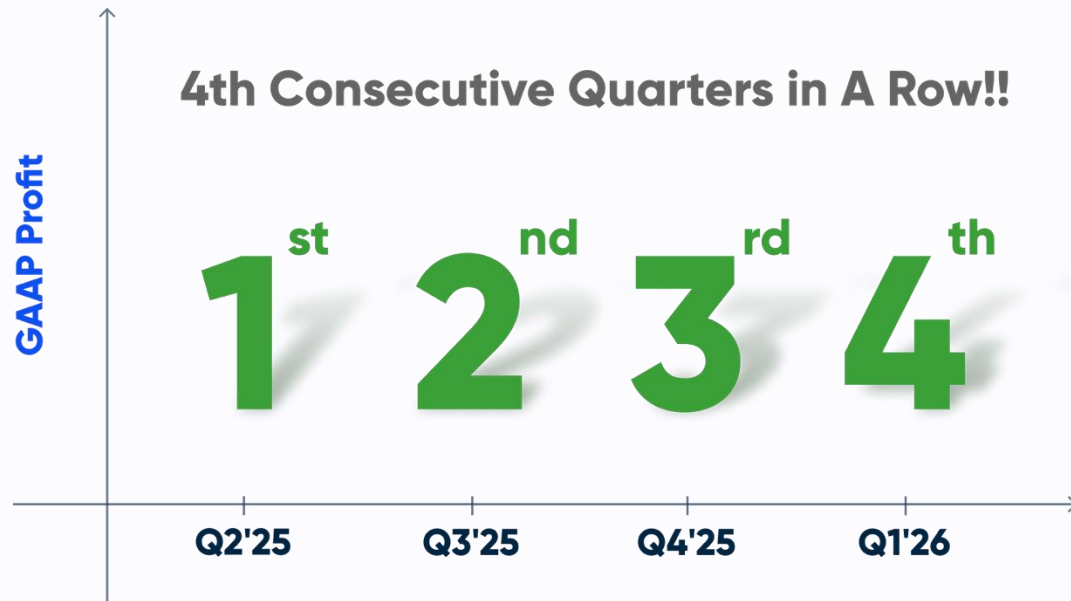
Net Dollar Retention (**NDR**) for Developer Services (Subscription) **at 103%**

05

Gross profit increased by **13% YoY**, reaching **RMB 66.3M**;
Gross Margin at **71.0%**, increased by **490 basis points YoY**

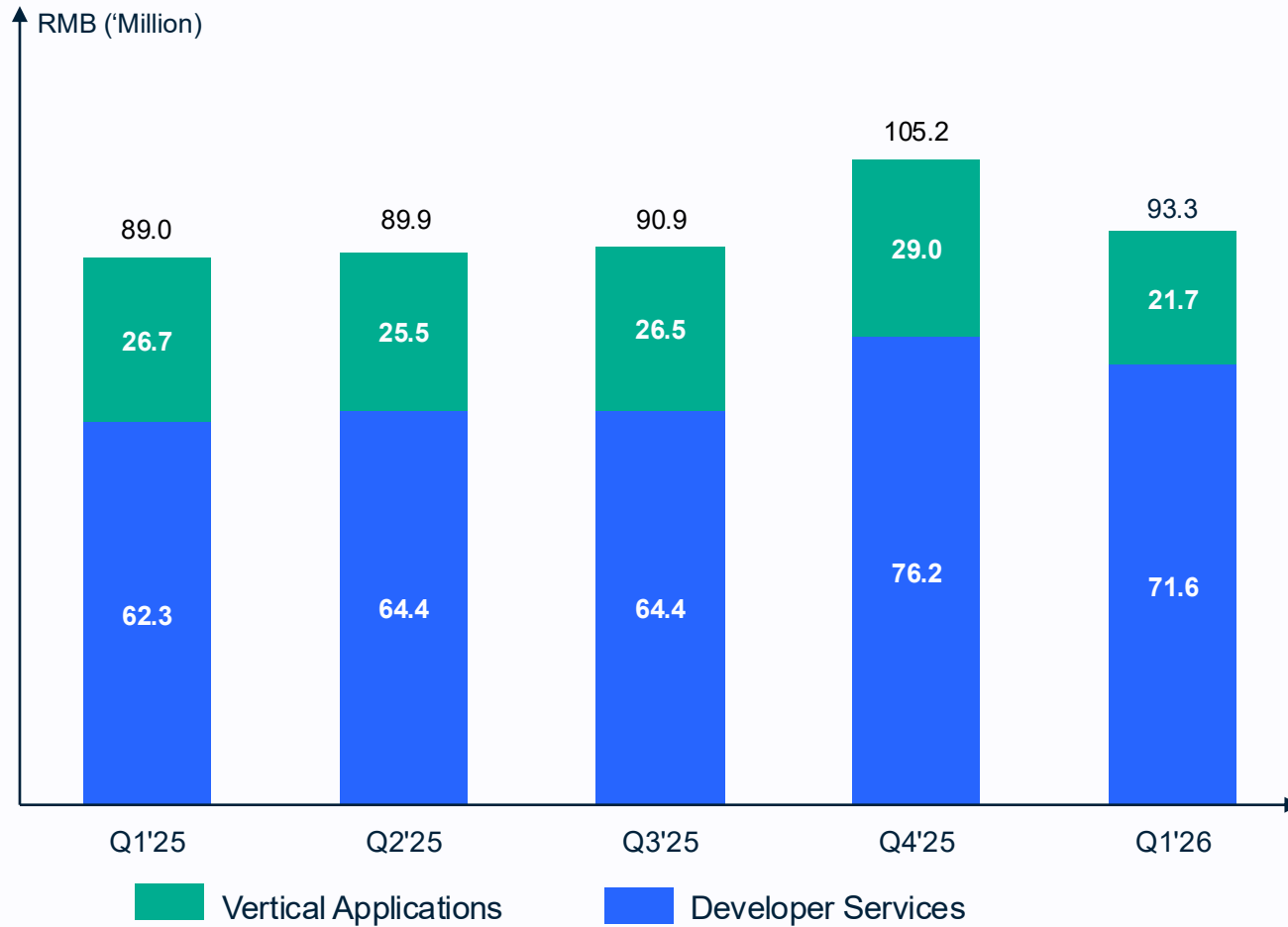
06

Excellent Opening Performance for FY2026



- In Q1'26, we achieved **US GAAP profits**; marking **4th consecutive quarters** of profitable quarters!
- This represented a **strong beginning** for 2026
- Despite the traditional slower operational momentum in Q1'26, we **maintained profitability and recorded a net profit**

Total Revenue Increased by 5% YoY

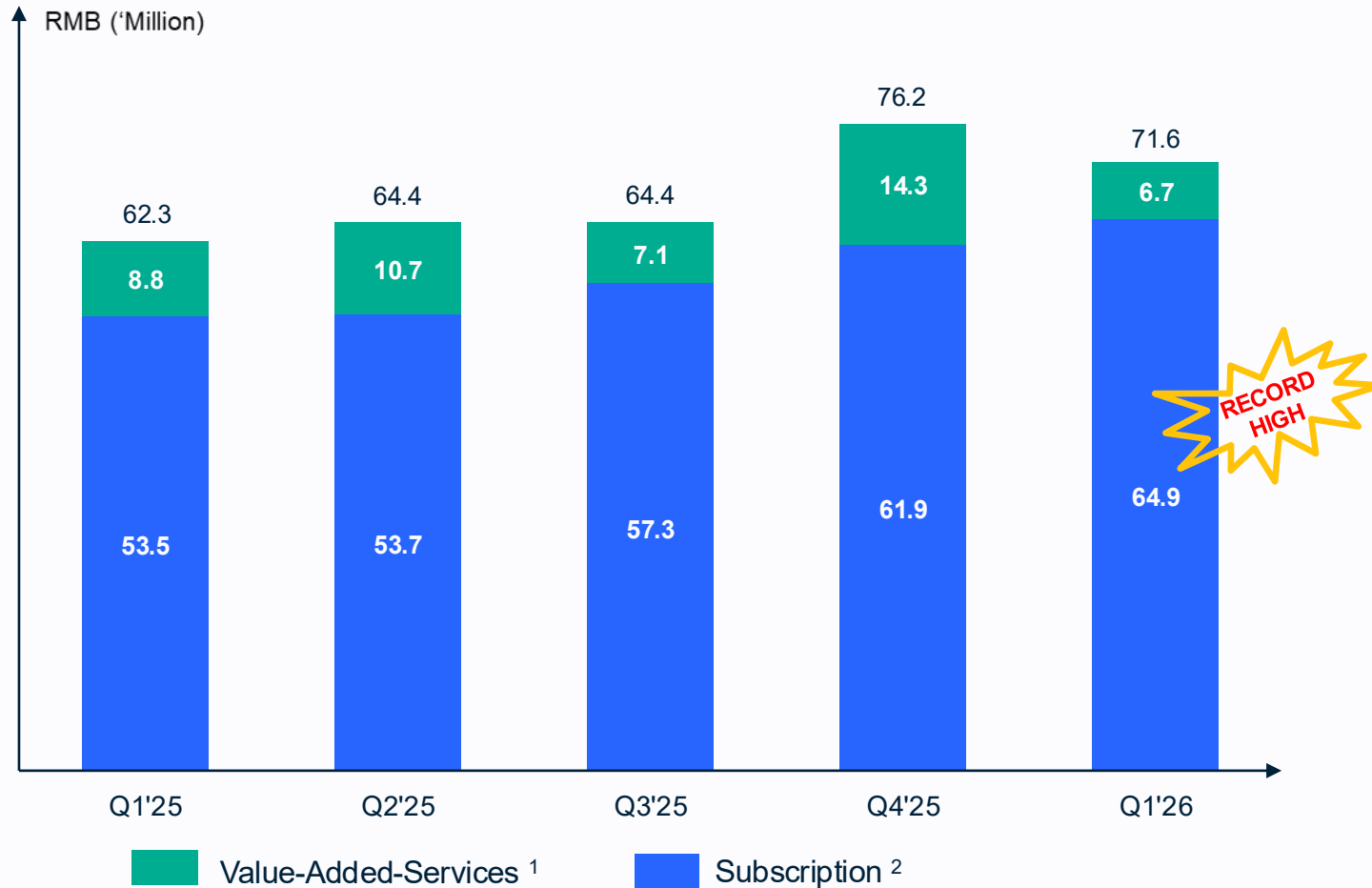


Total revenue at **RMB 93.3M** increased by **5% YoY**, mainly due to:

- Developer Services revenue grew by **15% YoY** and decreased by **6% QoQ**
- Vertical Applications revenue decreased by **19% YoY** and **25% QoQ**



Developer Subscription Revenue of RMB 64.9M at Historic High!



- **Subscription revenue:**

- Increased by **21% YoY** and **5% QoQ** mainly due strong growth in overseas business and rising ARPU
- Hit a new all-time high, with revenue at **RMB 64.9M!**

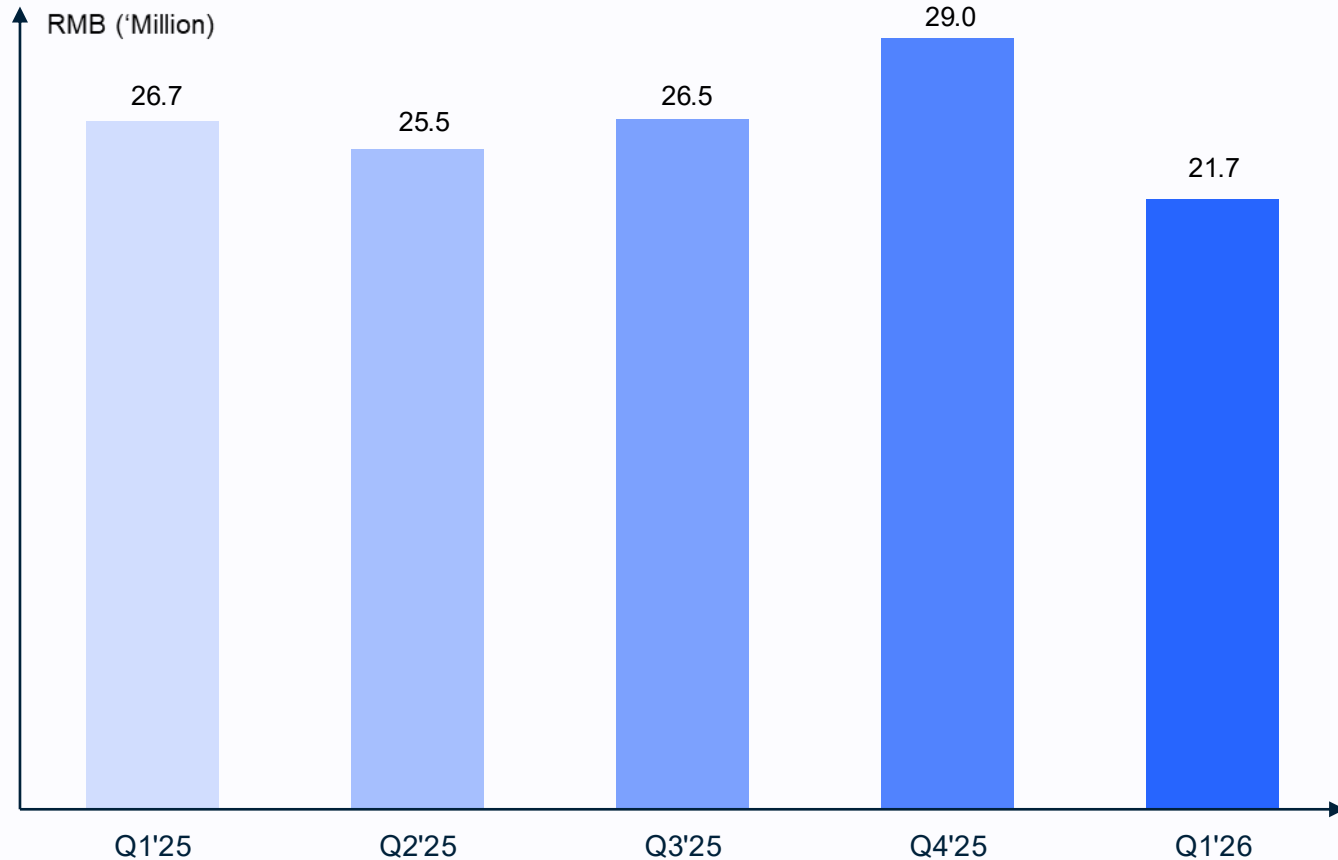
- **Value-Added-Services revenue:**

- Decreased by 24% YoY and 53% QoQ due to the non-existence online shopping festivals in Q1

1. Includes mainly advertisement related products

2. Includes push notification, EngageLab, SendCloud email services and other subscription based developer services

Vertical Application Revenue



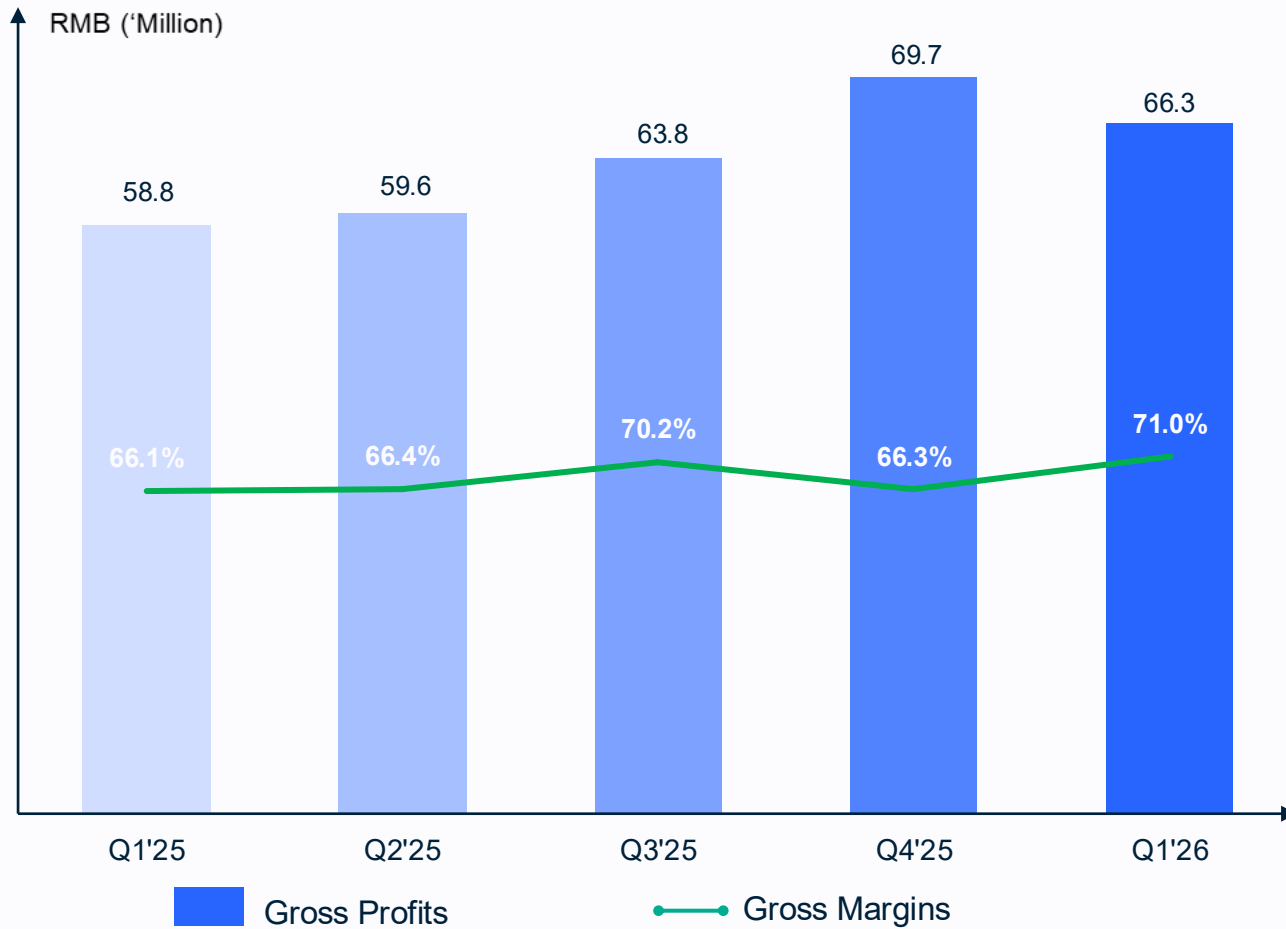
- **Include revenues from:**

- a) Market Intelligence
- b) Financial Risk Management

- Vertical Application revenue decreased by 19% YoY and 25% QoQ mainly due to overall weaker customer demand
- Financial Risk Management revenue decreased by 18% YoY due to the adverse impact brought by the changes to regulatory requirements in the financial sector

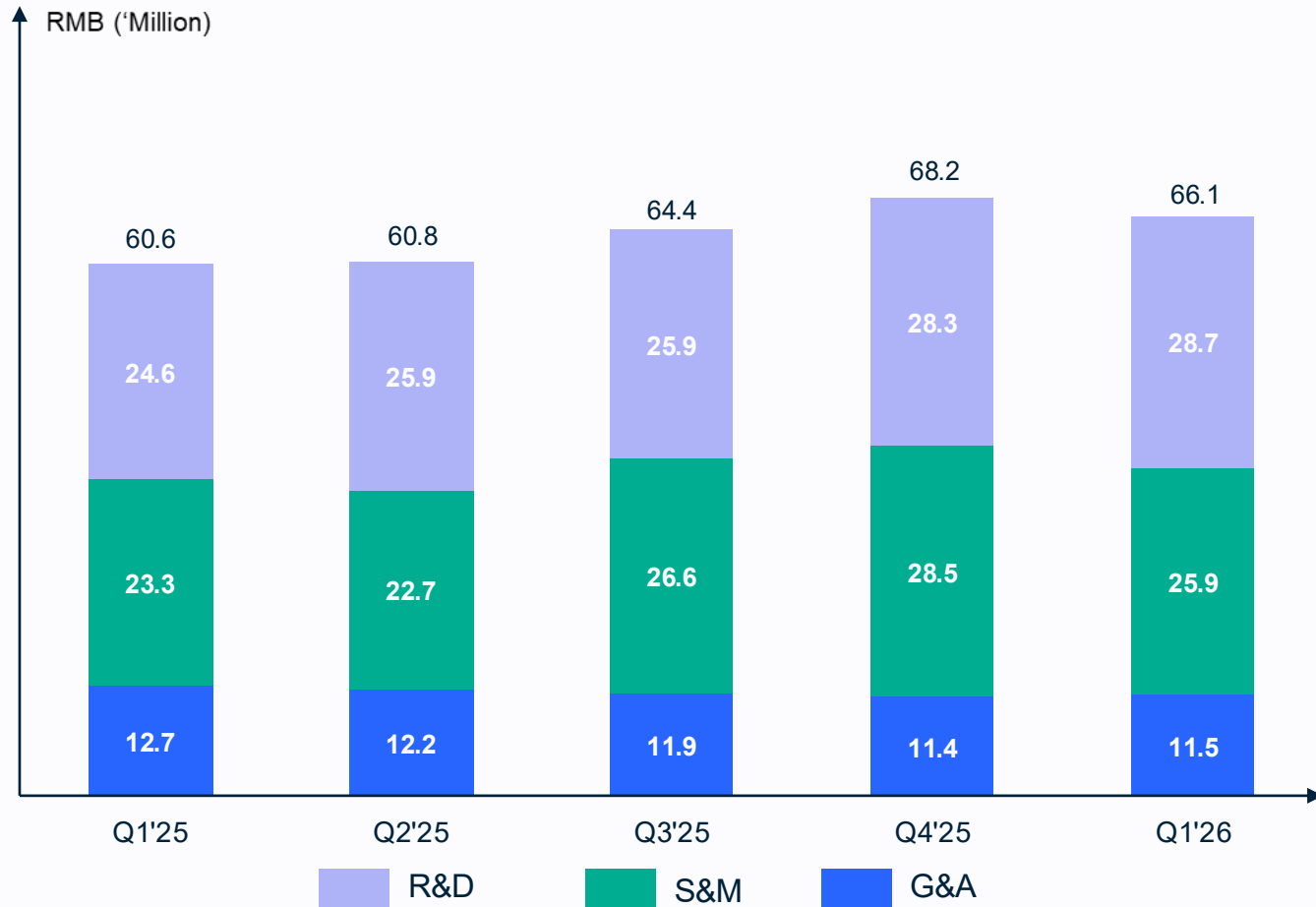


Gross Profit and Gross Margin Improved YoY



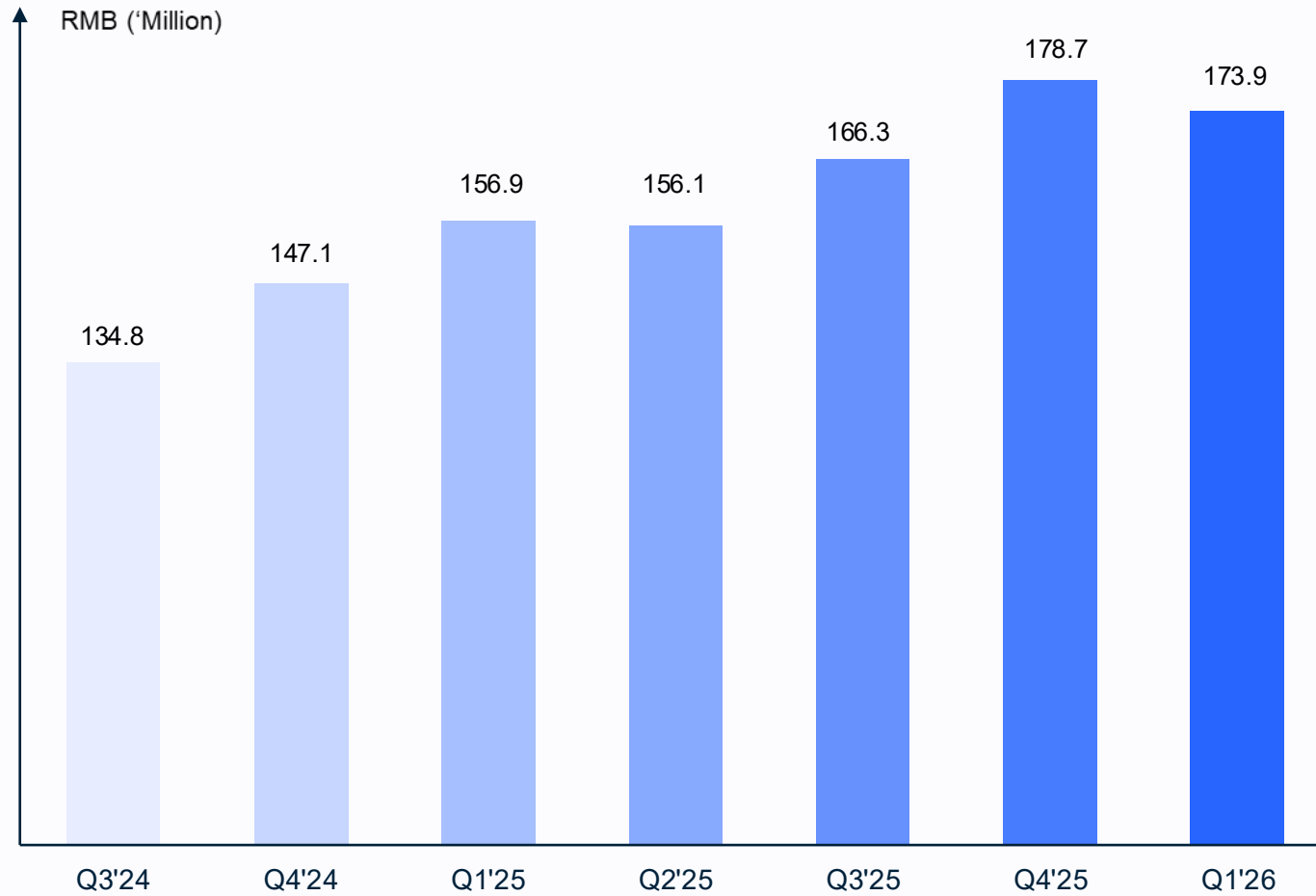
- Q1'26 Gross profit increased by **13% YoY** to **RMB 66.3M**
- Q1'26 Gross margin at **71.0%**, increased by **490 basis points YoY**, driven by the incremental contribution from **high-margin business revenue**

Operating Expenses Decreased by 3% QoQ



- Operating expenses structure remained stable with **effective cost control measures**
- Management has been diligent in ensuring OPEX is kept at optimal level while ensuring we can **grow the business and expand globally**

Deferred Revenue Increased by 11% YoY



- Deferred Revenue Q1 balance of **RMB 173.9M**
- High deferred revenue balance signifies:
 - strong customer loyalty;
 - predictable future revenue;
 - healthy cash flow;
 - an effective sales strategy



Balance Sheet & Financials at Healthy Level as of 3/31/2026

1

Cash and cash equivalents, restricted cash and short-term investments of:

- Healthy and high balance to fuel growth and expansion

RMB 142.2M as of 3/31/2026

2

Deferred Revenue balance at high level:

- 24th consecutive quarter of > RMB 100M
- Great business model with advanced payments from customers

RMB 173.9M as of 3/31/2026

3

AR Turnover Days at a low level:

- We collect cash in an efficient manner

At low level of 42 days

4

Net Dollar Retention (NDR) for Developer Services (Subscription):

- Customers continue to buy more of our products and services

At high level of 103%

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Use of Non-GAAP Financial Measures

In evaluating the business, Aurora Mobile Limited, (“Aurora”, “The Company”) considers and uses two non-GAAP measures, adjusted net (loss)/income and adjusted EBITDA, as a supplemental measure to review and assess its operating performance. In this presentation, these non-GAAP financial measures is not intended to be considered in isolation or as a substitute for the financial information prepared and presented in accordance with U.S. GAAP. The Company defines adjusted net (loss)/income as net (loss)/income excluding share-based compensation. The Company defines adjusted EBITDA as net (loss)/income excluding interest expense, depreciation of property and equipment, amortization of intangible assets, income tax expenses/(benefits), share-based compensation.

The Company believes that adjusted net (loss)/income and adjusted EBITDA help identify underlying trends in its business that could otherwise be distorted by the effect of certain expenses that it includes in loss from operations and net (loss)/income.

The Company believes that adjusted net (loss)/income and adjusted EBITDA provide useful information about its operating results, enhance the overall understanding of its past performance and future prospects and allow for greater visibility with respect to key metrics used by the management in their financial and operational decision-making.

The non-GAAP financial measures are not defined under U.S. GAAP and are not presented in accordance with U.S. GAAP. The non-GAAP financial measures have limitations as analytical tools. One of the key limitations of using adjusted net (loss)/income and adjusted EBITDA is that they do not reflect all items of income and expense that affect the Company's operations. Further, the non-GAAP financial measures may differ from the non-GAAP information used by other companies, including peer companies, and therefore their comparability may be limited.

The Company compensates for these limitations by reconciling the non-GAAP financial measures to the nearest U.S. GAAP performance measure, all of which should be considered when evaluating the Company's performance. The Company encourages you to review its financial information in its entirety and not rely on a single financial measure.



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Thanks

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