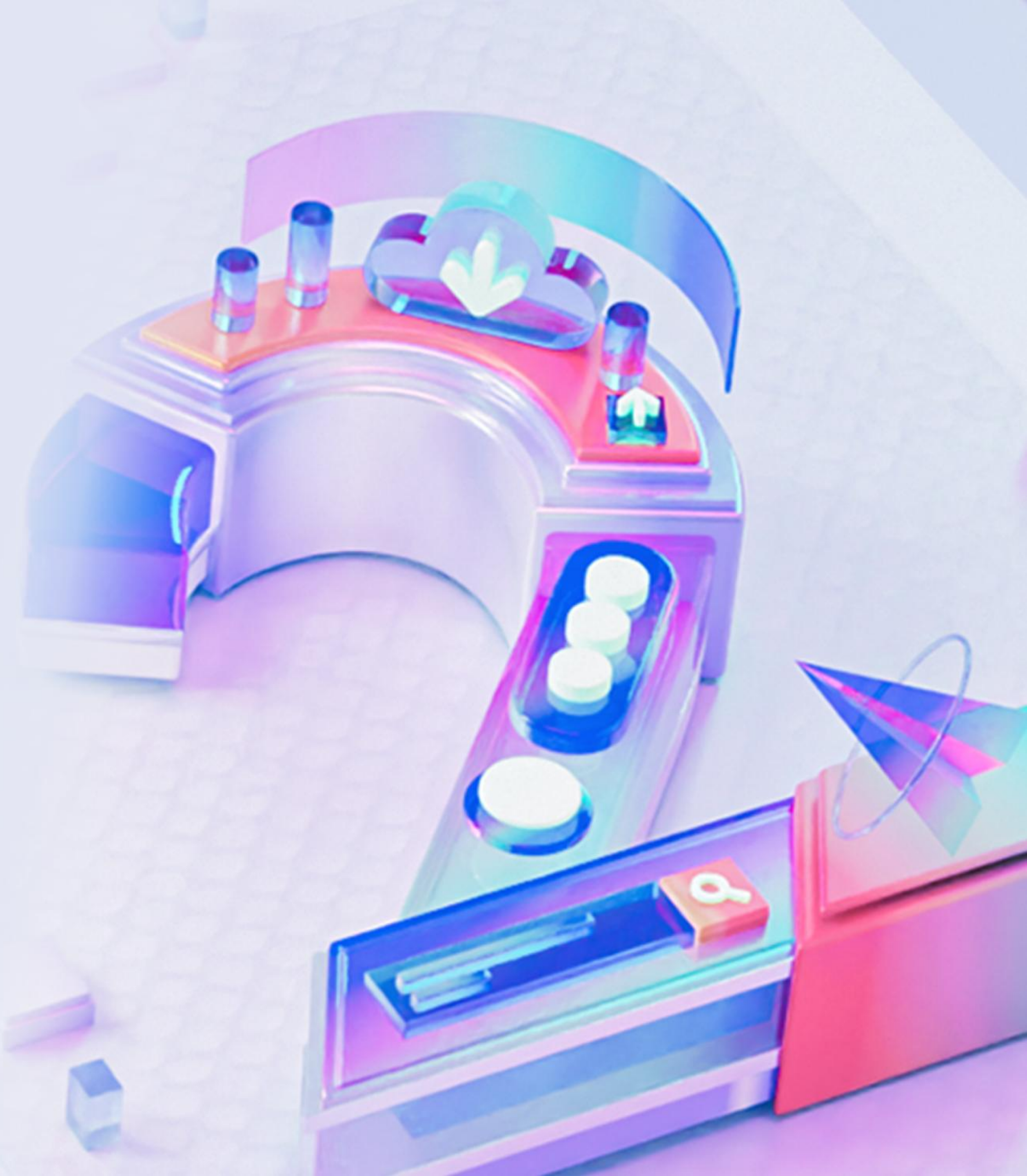
Nasdaq : JG

2026 Q2 EARNINGS PRESENTATION

Powered by Modellix

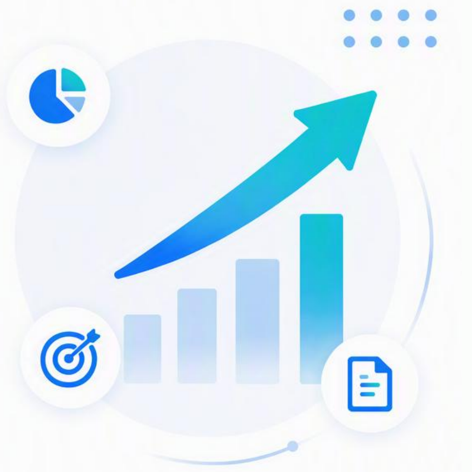


August 20, 2026

PART 1

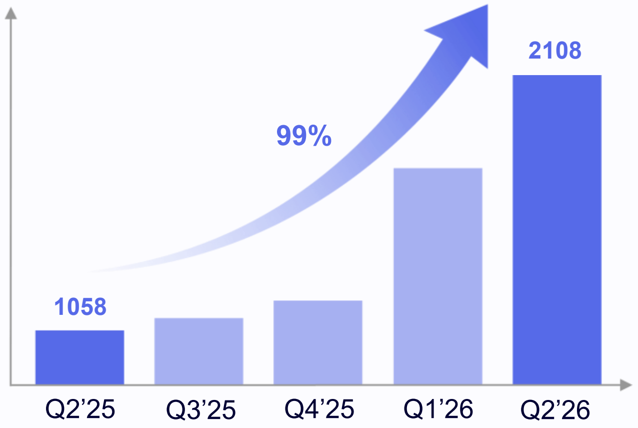
2026 Q2

Business Highlights

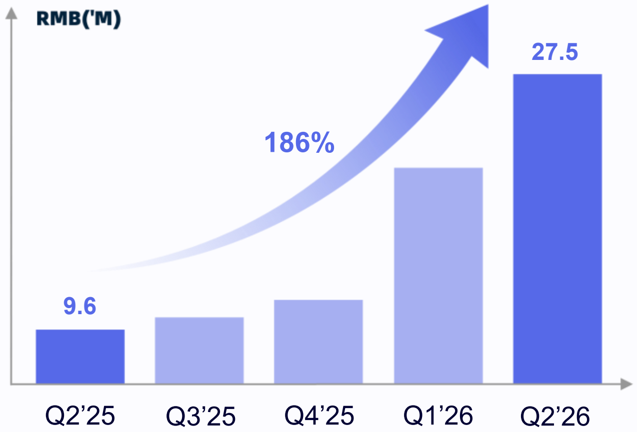


EngageLab — Our Global Flagship Product

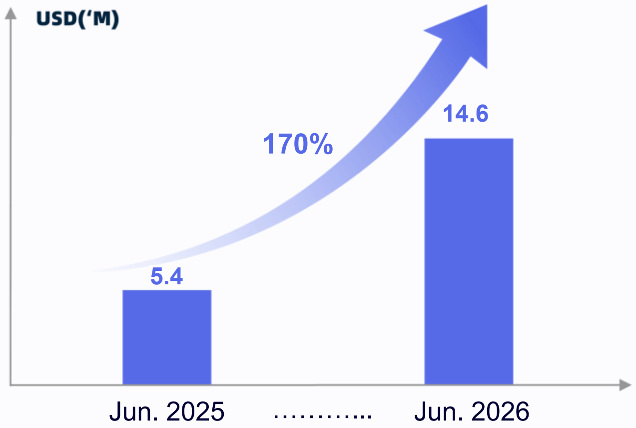
Customer Numbers:



Revenue:



Annual Recurring Revenue (ARR):



Customer Numbers

- Continued to gain new customers globally
- The customer numbers increased by **99% YoY** and **13% QoQ**!

Revenue

- The Q2'26 revenue reached **RMB 27.5M**
- Increased by **186% YoY** and **14% QoQ**

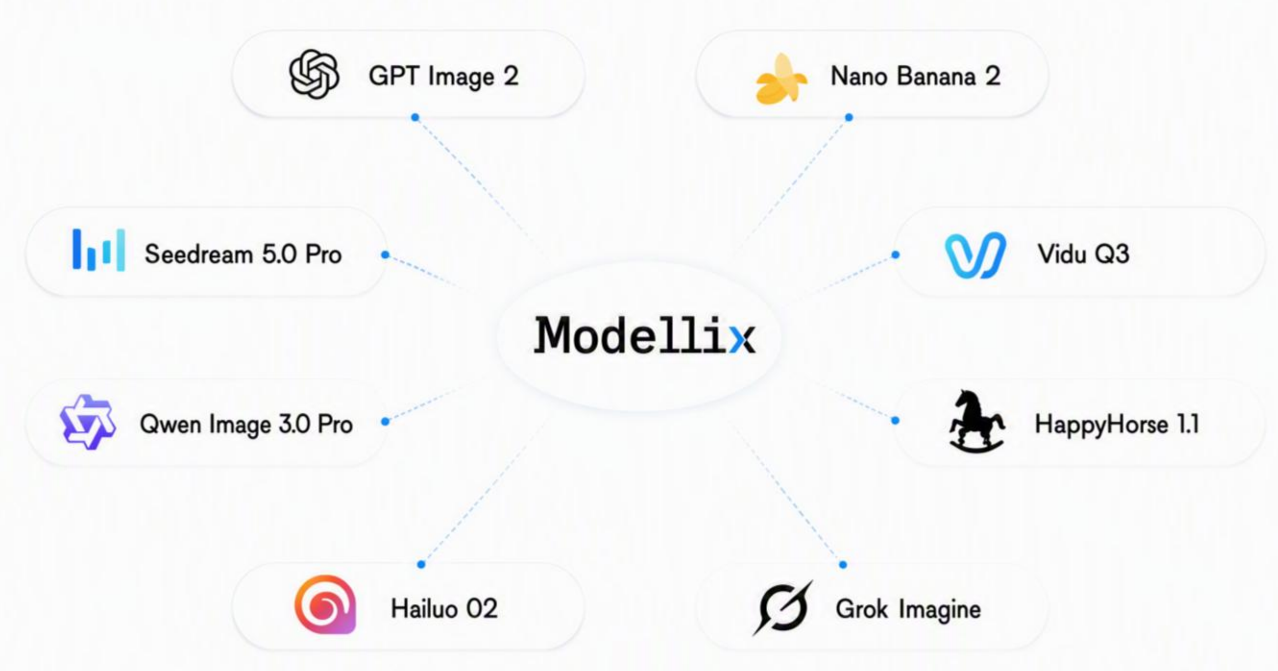
ARR - Explosive Growth!

- In Jun' 26, the ARR reached **USD 14.6M**!
- Increased by **170% YoY** and **25% QoQ**

Silent Auth Phone Number Authentication

- We officially launched "Silent Auth", an advanced passwordless authentication solution designed to complement existing SMS OTP services and elevate identity verification for the global market
- Silent Auth is not designed to replace SMS OTP, but to complete what OTP cannot cover alone in high-stakes scenarios. Utilizing Carrier Direct Connection, this solution seamlessly verifies the match between the user‘s phone number, SIM card, and device (MobileID) in the background within milliseconds
- EngageLab Silent Auth is now available **across 36 countries on 5 continents**, enabling users to complete identity verification with zero input

Modellix Integrated with Leading AI Models



- By integrating industry-leading AI models into a unified platform, Modellix enables enterprises to access the latest AI capabilities through a single API, **reducing integration complexity while accelerating AI application development**
- This strengthens our enterprise AI ecosystem, **expands customer adoption**, and **creates additional monetization opportunities** through scalable AI infrastructure services

Foster Ongoing Partnerships with Diverse Enterprises

- In Q2 2026, we secured partnerships with a diverse group of enterprises, including **CICC Wealth Management**, **Pobo Financial**, **Mocasa**, **Hebei Yuanda Information Technology Co., Ltd.**, **Axios Management**, and **Azuki Partners**, further demonstrating strong market adoption and accelerating our global commercialization

- The growing and diversified customer base demonstrates strong market validation, broad applicability of our solutions, and increasing potential to scale recurring SaaS and AI revenue globally

Expanding Our ISV & SI Partner Ecosystem

Regions	Number of ISVs/SIs
Southeast Asia	18
HK and Taiwan	8
Globe	3

- Our expanding ISV and SI ecosystem validates the growing market demand for Aurora's enterprise solutions
- Rather than relying solely on direct sales, our partner network creates a scalable distribution model that **accelerates customer acquisition**, **shortens deployment cycles** and **strengthens long-term recurring revenue potential**
- We now have **29 partners** across the globe to help us expand our reach

PART 2

2026 Q2

Financial Highlights

Group Revenues - Defined

01

Developer Services

Consist of:

- Subscription
- Value-Added Services

02

Vertical Applications

Consist of:

- Market Intelligence
- Financial Risk Management

Q2'26 Financial Performance at One Glance

Profitable Q2'26

5th Consecutive Quarter of US GAAP Profit

Revenue Exceeded

RMB 100M

In Q2'26

EngageLab

Revenue **186% ++** growth YoY

ARR reached **USD 14.6M**, **170% ++** growth YoY

RMB 70.7M

(record high)

For Developer Services (Subscription) revenue

NDR

for Developer Services (Subscription):

106% **(record high)**

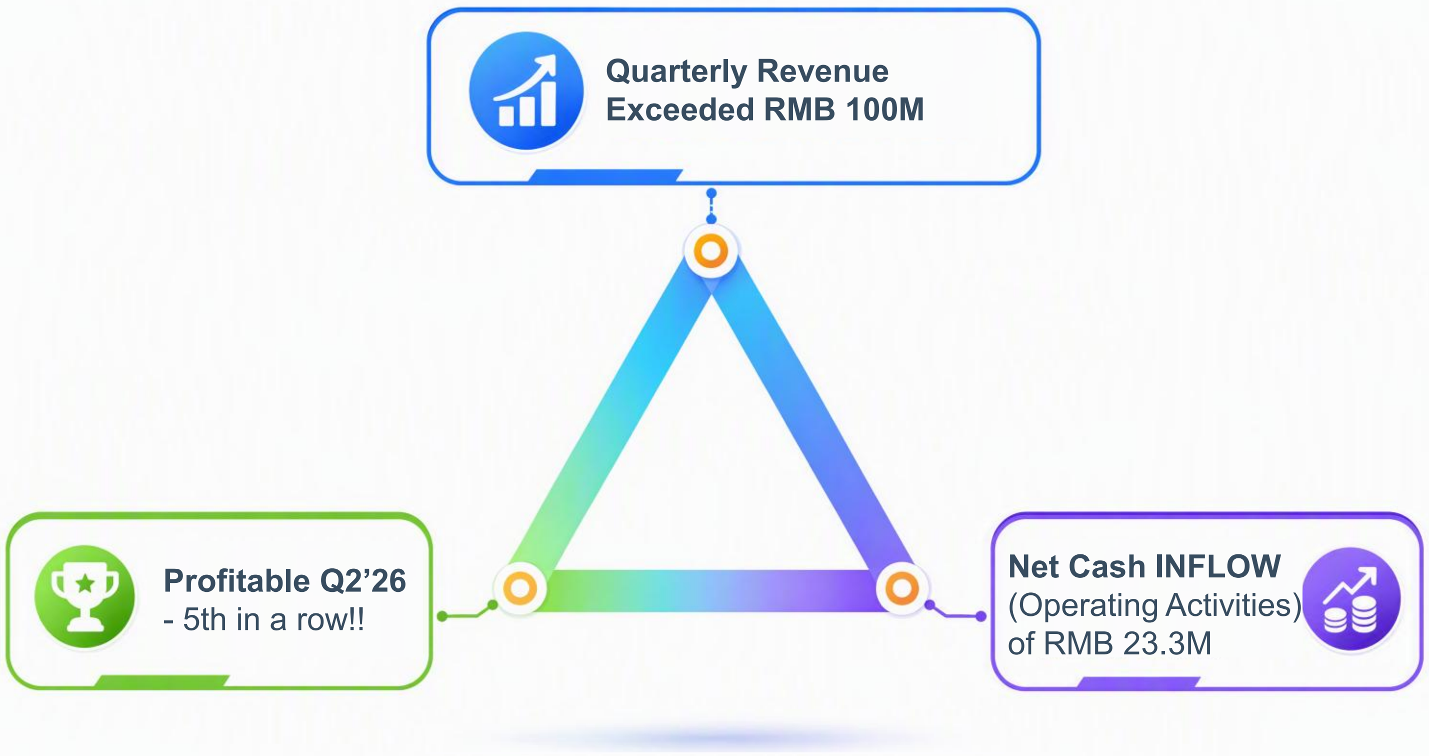
Gross Profit

at **RMB 69.2M**, up **16% YoY**

Gross Margin

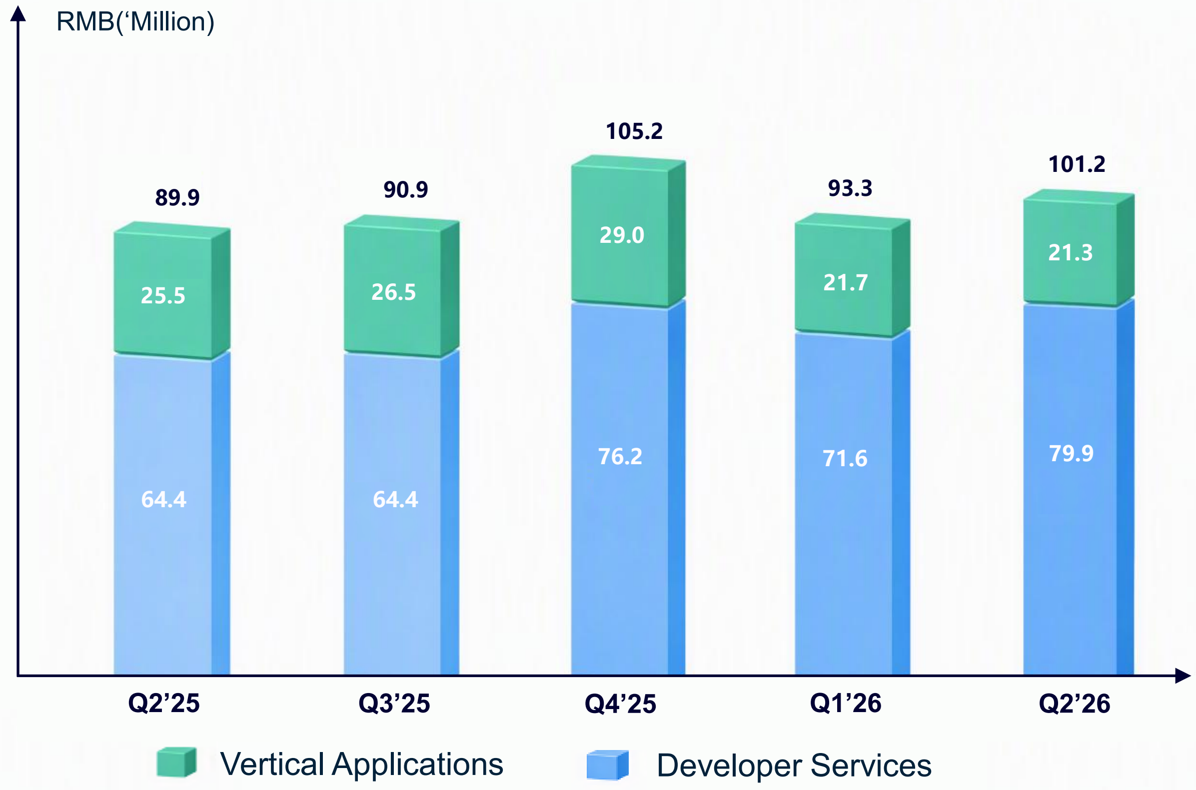
at **68.3%**, up **197 basis point YoY**

Recorded 3 Key Financial Milestones in Q2’26



- 3 important milestones in Q2’26:
  - Revenue exceeded the **RMB 100M** mark
  - Achieved our **5th consecutive profitable quarter**
  - Operating activities generated net cash INFLOW of **RMB 23.3M**
- This has proven our business model is **thriving, profitable** and **sustainable**!

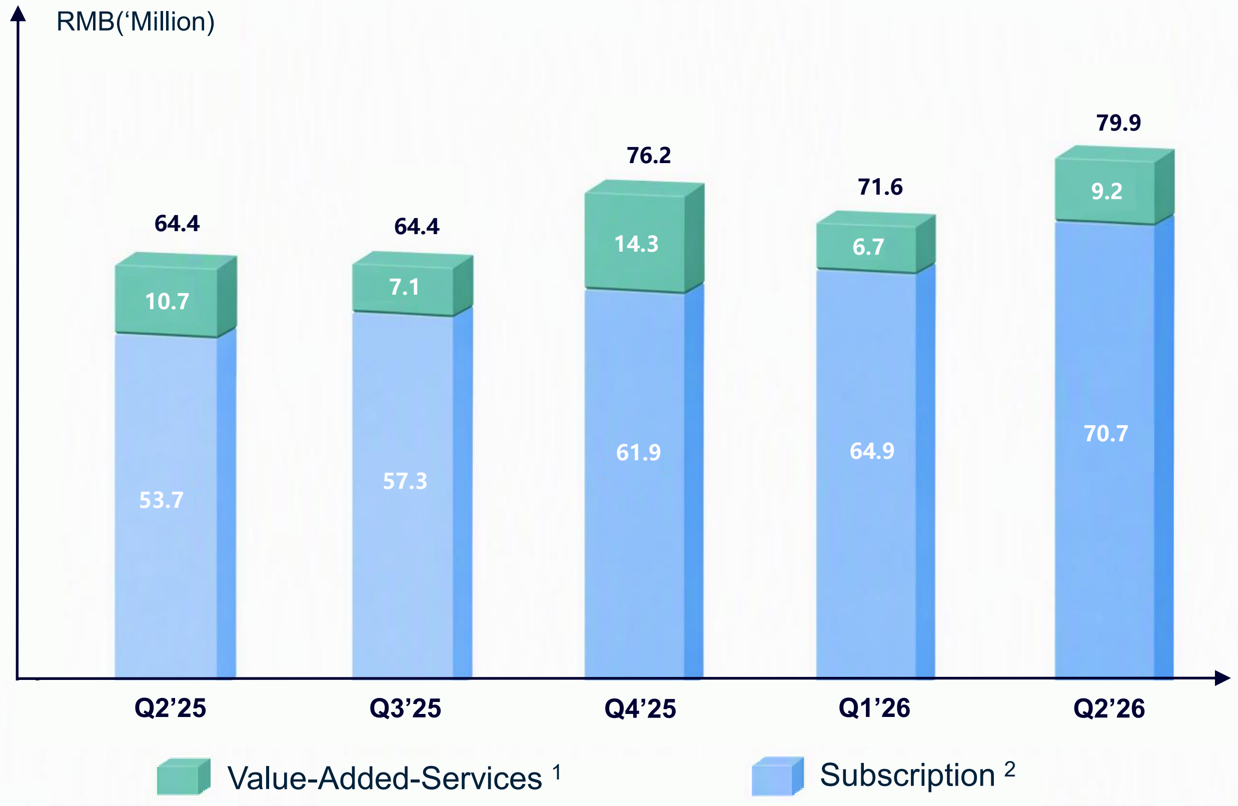
Total Revenue Increased by 13% YoY and 9% QoQ



Total revenue at **RMB 101.2M** increased by **13% YoY and 9% QoQ**, mainly due to:

- Developer Services revenue grew strongly by **24% YoY** and **12% QoQ**
- Vertical Applications revenue decreased by **16% YoY** and **1% QoQ**

Developer Subscription Revenue Hit a Record High of RMB 70.7M



1. Includes mainly advertisement related products
2. Includes push notification, EngageLab, SendCloud email services and other subscription based developer services

- **Subscription revenue:**
  - Increased by **32% YoY** and **9% QoQ** mainly driven by the rapid expansion of the overseas business and growth in the customer base
  - Reached a historic high of **RMB 70.7M**!

- **Value-Added-Services revenue:**
  - Decreased by 15% YoY and increased by 36% QoQ. Growth driven by the 6/18 eCommerce shopping festival

Vertical Application Revenue

- **Include revenues from:**
  - a) Market Intelligence
  - b) Financial Risk Management
- Vertical Application revenue decreased by 16% YoY and 1% QoQ primarily due to lower customer demand
- Financial Risk Management revenue decreased by 17% YoY due to the impact of regulatory policy changes

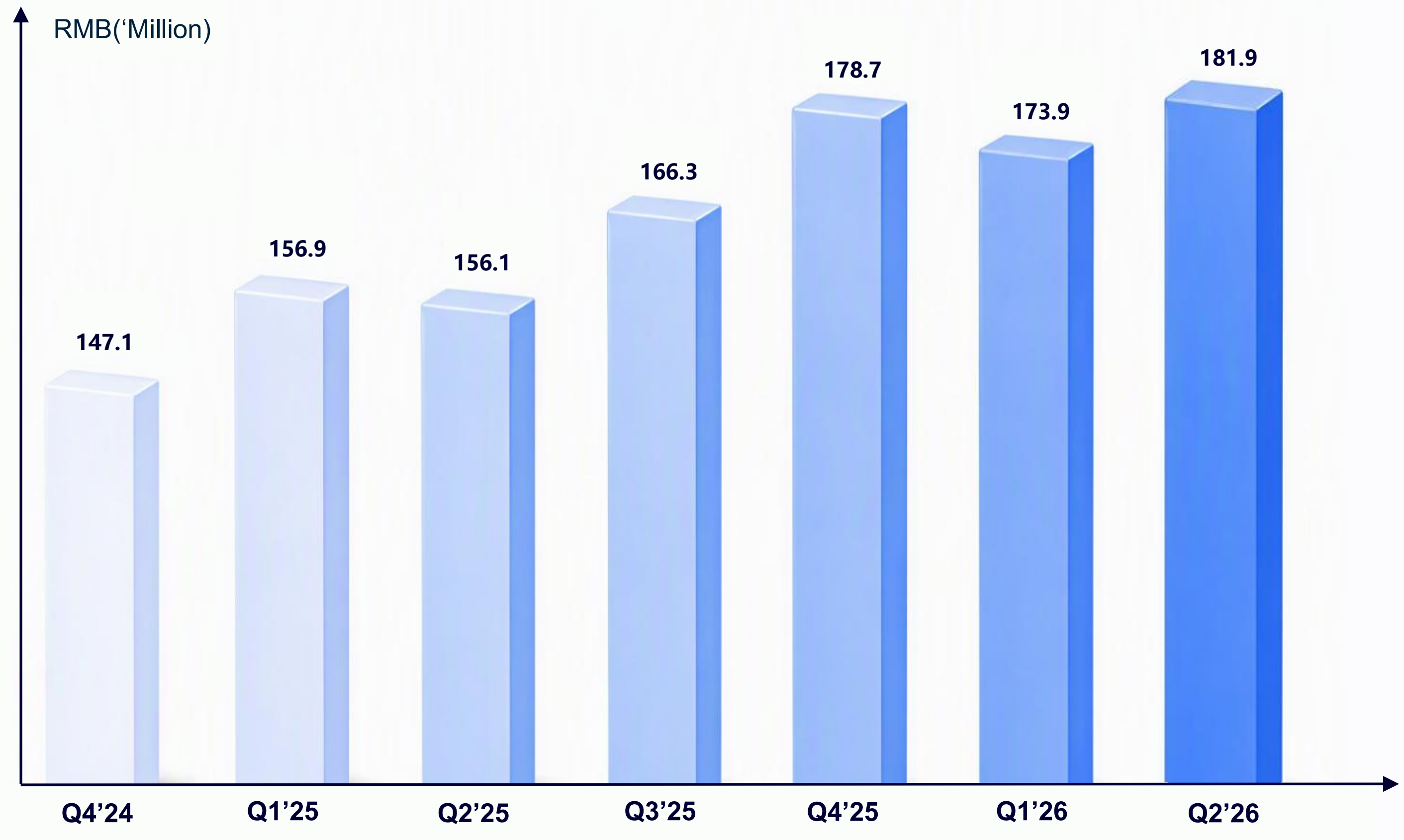
Gross Profit and Gross Margin Improved YoY

- Q2'26 Gross profit increased by **16% YoY** and **4% QoQ** to **RMB 69.2M**
- Q2'26 Gross margin at **68.3%**, increased by **197 basis points YoY,** driven by a **higher-quality revenue mix**

OPEX At Optimal Level

- OPEX increased by 11% YoY and 2% QoQ, mainly driven by the **expansion of our overseas business**
- Management is comfortable with our current OPEX profile, which **is calibrated to support sustained revenue growth**

Deferred Revenue Balance Reached a Record High!



- Q2'26 Deferred Revenue balance of **RMB 181.9M**
- An all-time high deferred revenue signifies:
  - strong customer contract commitments;
  - better revenue visibility;
  - growing enterprise demand;
  - successful & proven upsell traction

Balance Sheet & Financials at Healthy Level as of 6/30/2026

01 Cash and cash equivalents, restricted cash and short-term investments of: ***RMB 166.8M***

- Support future growth and strategic investments

02 Deferred Revenue balance at high level: ***RMB 181.9M***

- 25th consecutive quarter of > RMB 100M
- High revenue vsibility and customer prepayments

03 AR Turnover Days at a low level: ***37 days***

- Reflect strong cash collection and low bad debt risk

04 Net Dollar Retention (NDR) for Developer Services (Subscription): *Record high of* ***106%***

- Sustainable recurring revenue growth

05 Net Cash INFLOW from operating activities: ***RMB 23.3M***

- Strong operating cash inflow reflects solid cash generation and high-quality earnings

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)/income 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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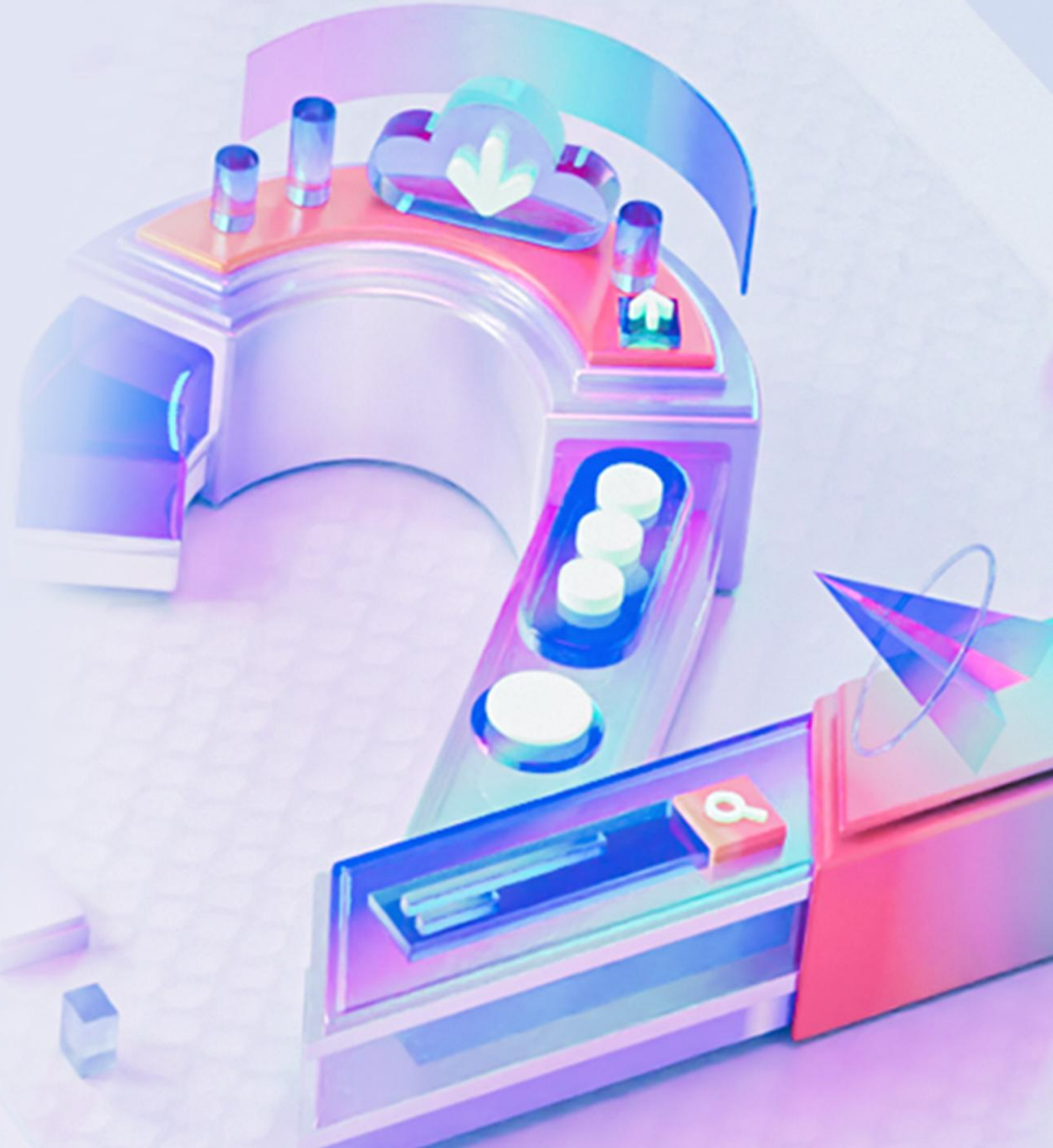

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