



INVESTOR DAY

22 MARCH 2018

DISCLAIMER

These forward-looking statements reflect the Company's current intentions, plans, expectations, assumptions and beliefs about future events. Actual future performance, outcomes and results may differ materially from those expressed in forward-looking statements as a result of a number of risks, uncertainties and assumptions. Representative examples of these factors include (without limitation) general industry and economic conditions, interest rate trends, cost of capital and capital availability, competition from other companies and venues for the sale/distribution of goods and services, shifts in customer demands, customers and partners, changes in operating expenses, including employee wages, benefits and training, and governmental and public policy changes, as well as natural disasters which may negatively impact business activities of the ST Engineering Group. You are cautioned not to place undue reliance on these forward-looking statements, which are based on current view of management on future events. The Company does not undertake to update these forward-looking statements to reflect events or circumstances which arise after publication.

SMART CITY

RAVINDER SINGH

*PRESIDENT, ST ELECTRONICS &
PRESIDENT, DEFENCE BUSINESS*

LEE SHIANG LONG

PRESIDENT, ST KINETICS

Pursue Growth Opportunities | Smart City

Significant
and growing
market
opportunity



Build upon
core competencies
and end-to-end
capabilities

Leverage
Singapore track
record; positioned
for overseas
success



Expect Smart City revenue of **S\$1b** in 2017 to **more than double** by 2022

Why Smart City?

Demographic Change



By 2050, population aged over 60 is set to **double** to over 2 billion

Significant increase in dependency ratio while birth rate continues to fall

Urbanisation



By 2050, **86%** of the developed world and **64%** of developing world will be urbanised

Strain on essential public services

Resource Scarcity



By 2040, developing countries will consume **65%** of energy

By 2025, **two-thirds** of the world's population would face water shortages

Climate Change

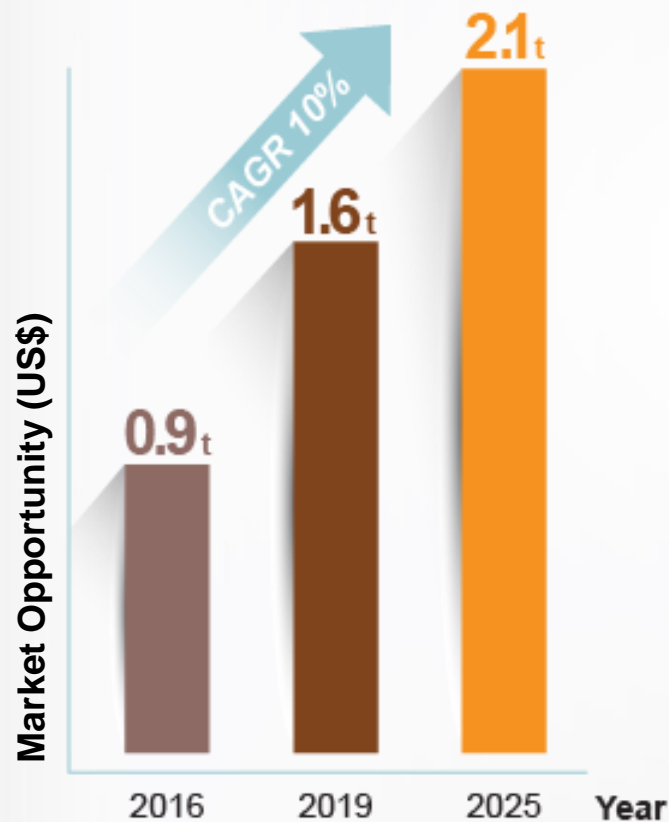


Rising global average temperature

Extreme weather conditions

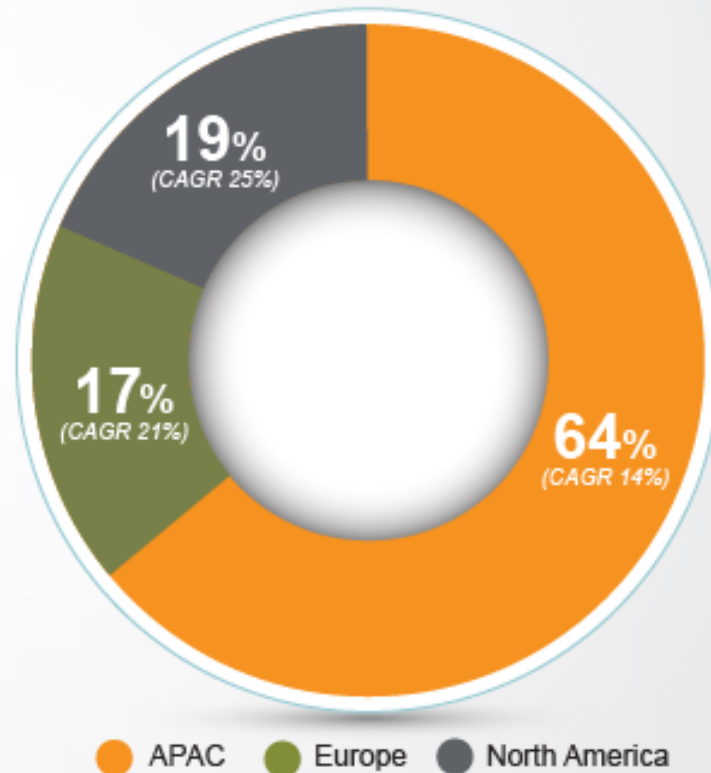
Smart City Global Market

Global Market
2016 - 2025



Sources: IHS insights (2016) Expert interviews;
Frost & Sullivan (2017)

Global Market, by Major
Regions, 2025



Sources: Frost & Sullivan (2017);
Persistence Market Research Pvt. Ltd

Our Smart City Global Presence

Smart
Security



Smart
Environment



Smart
Mobility



Leverage Singapore Track Record



Our Smart City Solutions

Smart Security



Public
Security



Cyber
Security

Smart Environment



Energy
Management



Waste
and Water

Smart Mobility



Rail



Road

**Businesses
and Platforms
Across Verticals**



**Analytics and
Artificial Intelligence**

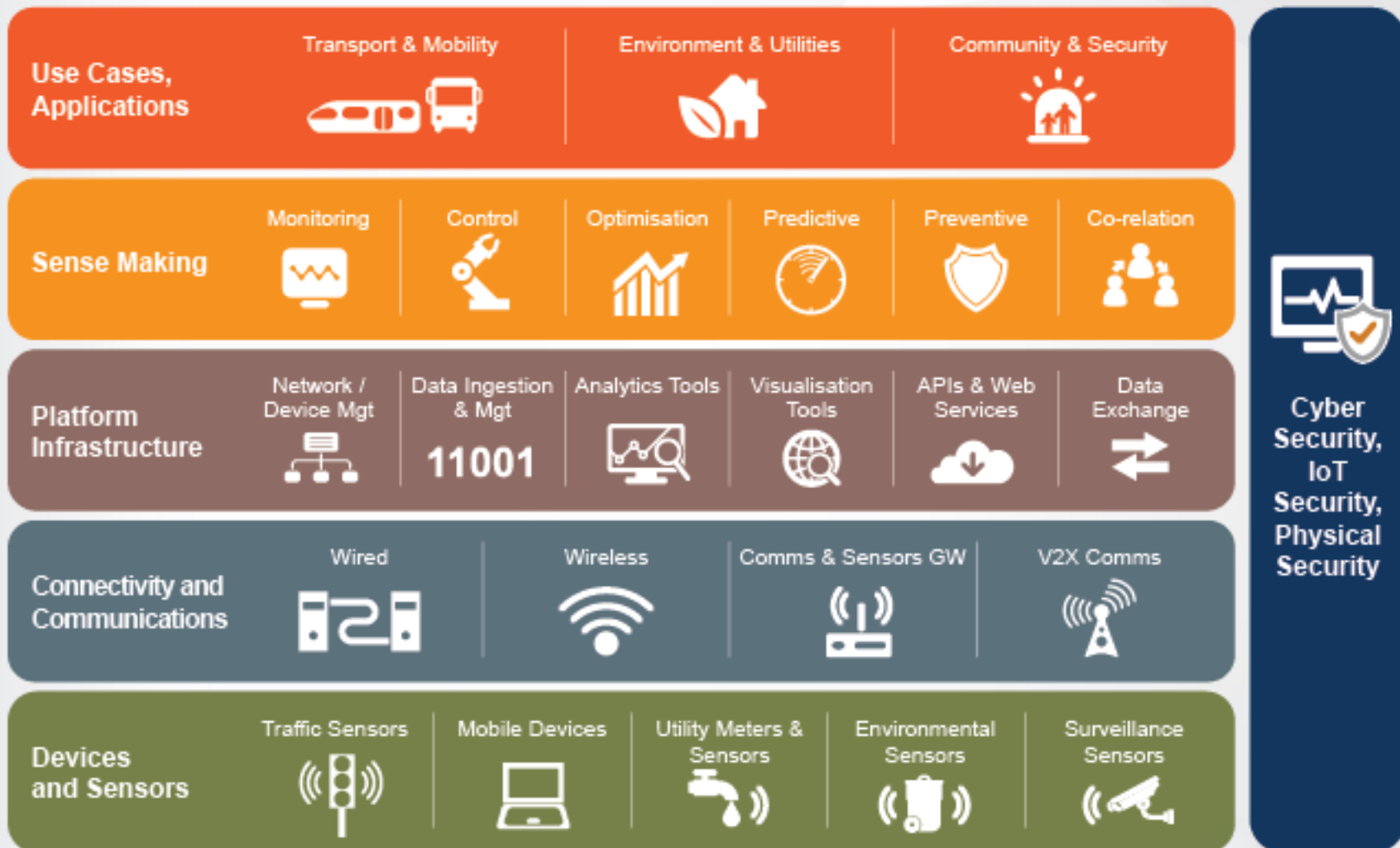


**Digital
Connectivity**



Robotics

End-to-end Solutions – Our Unique Differentiator

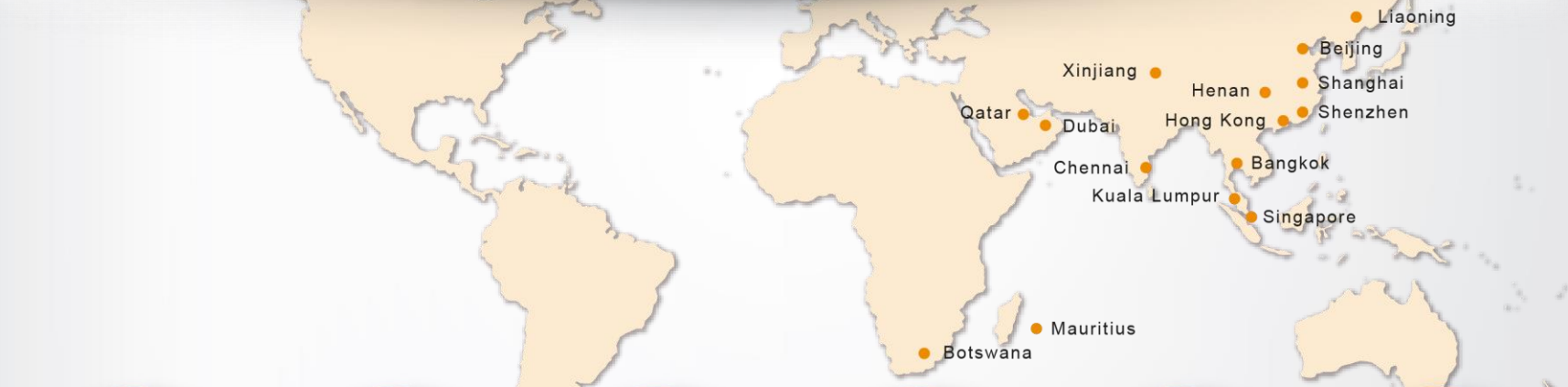


Enabled by integrated architecture

SMART SECURITY

Public Safety & Security

>100 large projects and facilities across **18** cities



Large Complexes



Homeland Security



Museums



Transport



Prisons



Hospitals

Public Safety & Security

| Physical Security Solutions



Aviation Security

- Airport Operations Collaboration System
- Air Traffic Smart Tower
- Communication and Aircraft Identification
- Counter-Drone System



Maritime Security

- Seaport Security
- Coastal Surveillance
- Vessel Tracking
- Asset Tracking



Key Installation Security

- Wide Area Security
- Perimeter Security
- Checkpoint Security
- Integrated Security Management



Protected by Cyber Security Solutions

Cyber Security

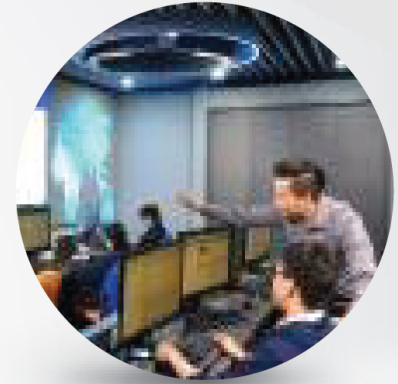
Cyber Analytics &
Management Software



Managed
Security Services



Security Operation
Centre (SOC)



Professional Services
& Training



Customised Security &
Authentication Solutions



Operational Technology
Cyber Security



SMART ENVIRONMENT

Grow Environmental Engineering Business

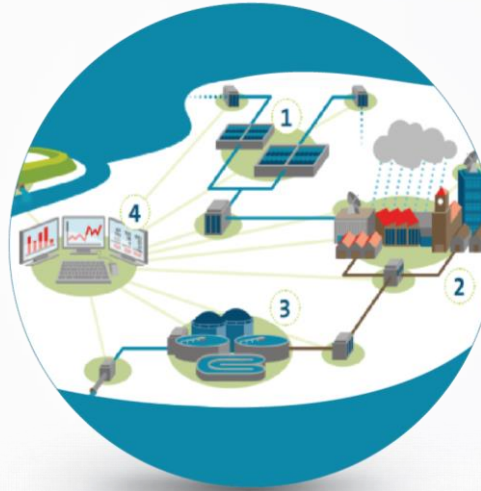
Build on our first success in JIDP*



US\$185b addressable market in APAC & MEA

- Leverage track record to **penetrate key target markets**

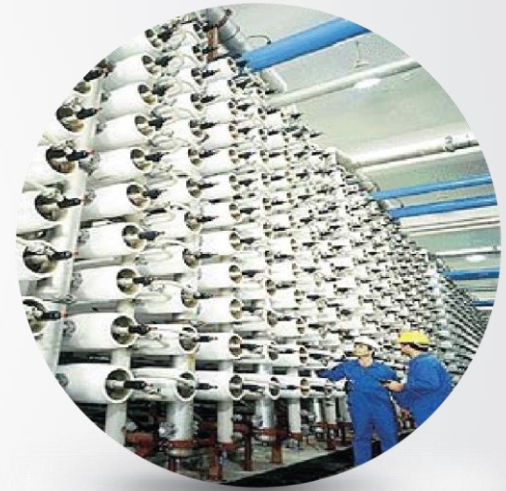
Cultivate an inventory of smart technologies



Smart water and waste management technologies

- Use analytics to **optimise plant operations, improve yield; reduce operational and maintenance costs**

Grow recurring income streams



Grow recurring income through

- **Public Private Partnership and operation and maintenance of infrastructure assets**

* Jurong Island Desalination Plant (JIDP)

Smart Sensor Networks Deployment

>15
million
wireless nodes
deployed



>132,000
Smart Street Lights
& Snow Sensors

CANADA



>120,000
Smart Street Lights

UK



Flood Lights
INDIA



Smart Street Lights
& Water AMI/AMR

USA



Smart Street Lights

FRANCE



Smart Street Lights
BRAZIL



Water Resource
Management &
Smart Street Lights

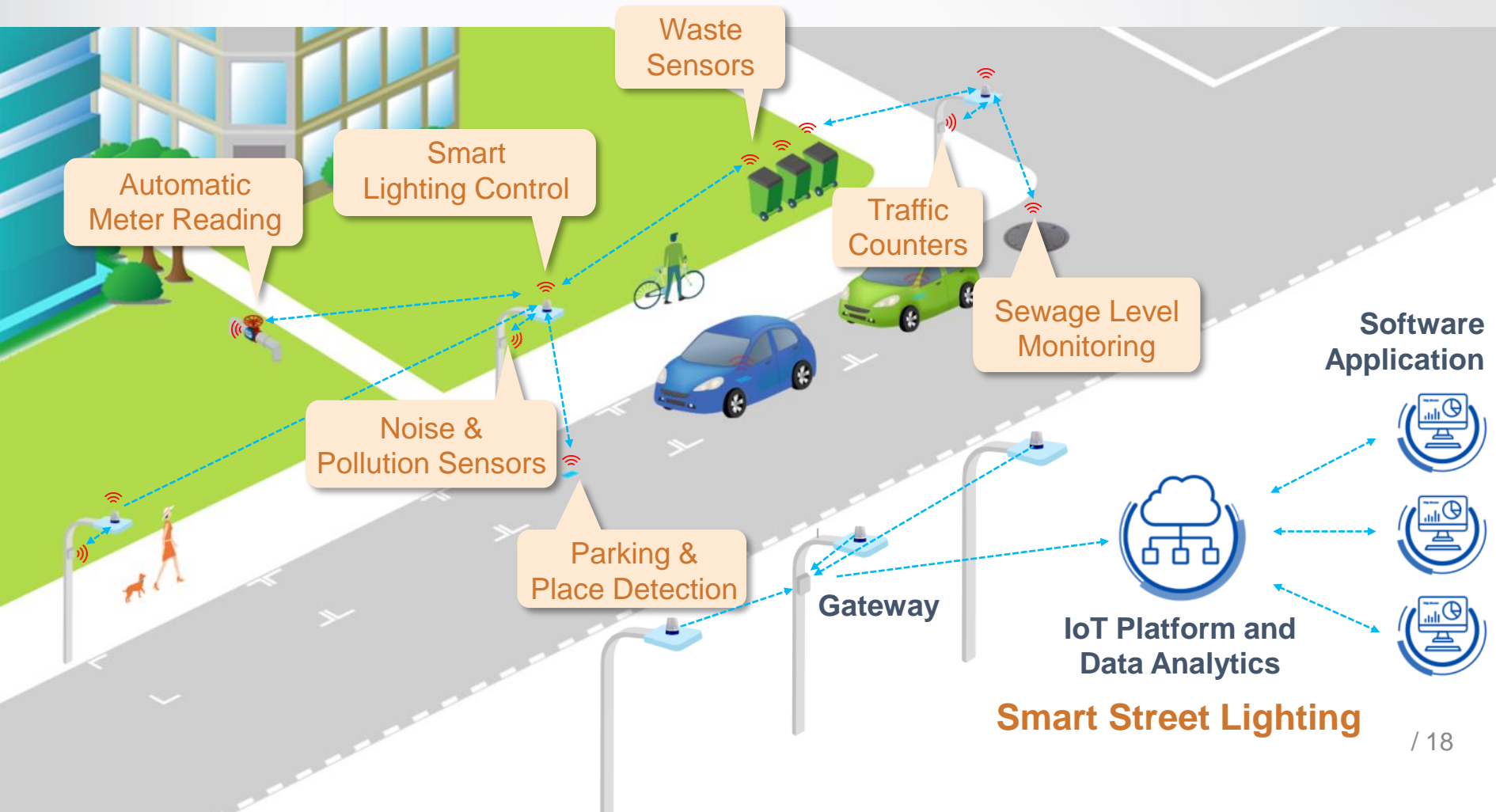
ISRAEL



Smart Street Lights
NEW ZEALAND

Internet of Things (IoT) Solutions for Smart Cities

Integrated platform to enable smart city management solutions



Integrated Estate Management

Applying data analytics and artificial intelligence to Smart Cities



Legend



Gateway



Noise & Temperature/ Humidity Sensor



Water Meter Sensor

Digital Connectivity through Satellite

Smart Cities



Connected Cars



Aviation



Maritime



Source: Ericsson Mobility Report, Nov 2016

World Leader in Satellite Communications

Close partnership with major satellite operators

75% of the world's top 20 operators use our enterprise satellite communication (satcom) system



INTELSAT



Strong presence in key mobility and defence markets

Significant market share in global satcom TDMA* sites in service

MARITIME

60%

AVIATION

46%

MILITARY

41%

*Time-Division Multiple Access (TDMA)

Source: COMSYS VSAT Report, 14th Edition

SMART MOBILITY

Our Vision of Smart Mobility: Connected, Seamless & Integrated



Smart
Rail Suite
Solutions



Autonomous
Public Transport
Solutions

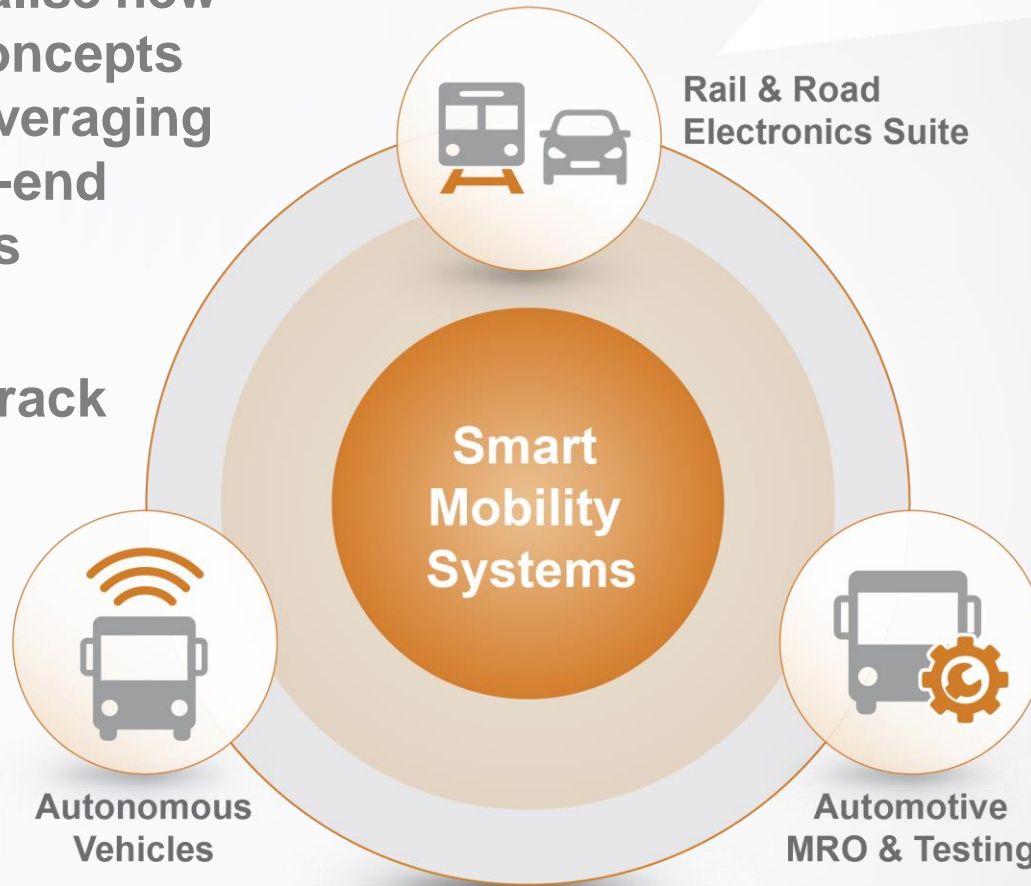


Intelligent Road
Transport
Solutions

Engineering the Future of Mobility

Operationalise new mobility concepts through leveraging our end-to-end capabilities

Leverage track record in Singapore



Key Enablers



Digital Connectivity



Analytics and Artificial Intelligence

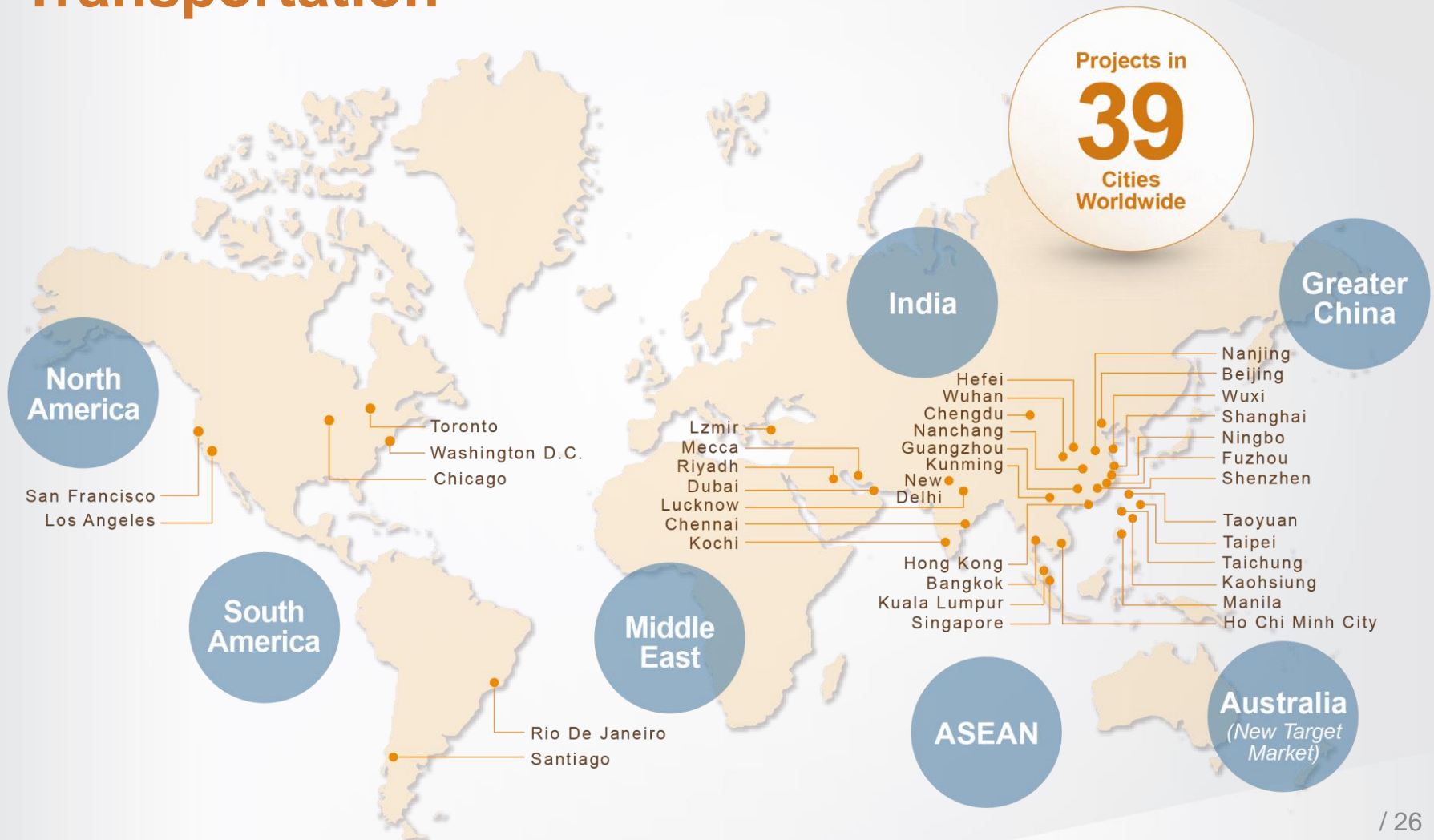


Robotics



Cyber Security

Smart Rail Suite Solutions: Strong Track Record in Rail Transportation



Smart Rail Suite Solutions: Leading Solutions

Complete and comprehensive range of rail electronic products and solutions



Smart Metro
Control Centre



Command,
Control & Communications



Enterprise Asset
Management System



Automatic Fare Collection



Platform Screen Door



Passenger Information System

Intelligent Road Transport Solutions: Strong Track Record

Completed **>100** Intelligent Road Transport projects
in **>20** cities around the world



Intelligent Road Transport Solutions: Suite of multimodal transport solutions



**Urban Traffic
Management**



**Traffic
Enforcement**



**Bus & Taxi
Fleet Management**



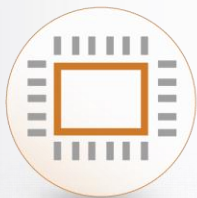
**Driver
Simulators**

Smart Mobility Platforms: Building on Deep Mobility Expertise

| 50 years of engineering track record



| Strong foundation in technologies and capabilities



Electronics



Vehicle
Electronics



Cyber Security



Fleet
Management



Data Analytics
for MRO



AR/VR
MRO Systems

End-to-end Transportation Solution: Competitive Edge

| Leverage Singapore's Smart Nation ecosystem to accelerate speed of operationalisation

**Autonomous Buses for “First-” & “Last-Mile”,
as part of the future Smart Mobility Systems**



| Participate in full value chain



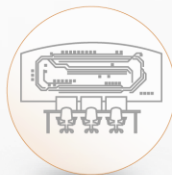
Mobility As A
Service (MAAS)



Fleet
Management



Safety
Monitoring



Command
& Control



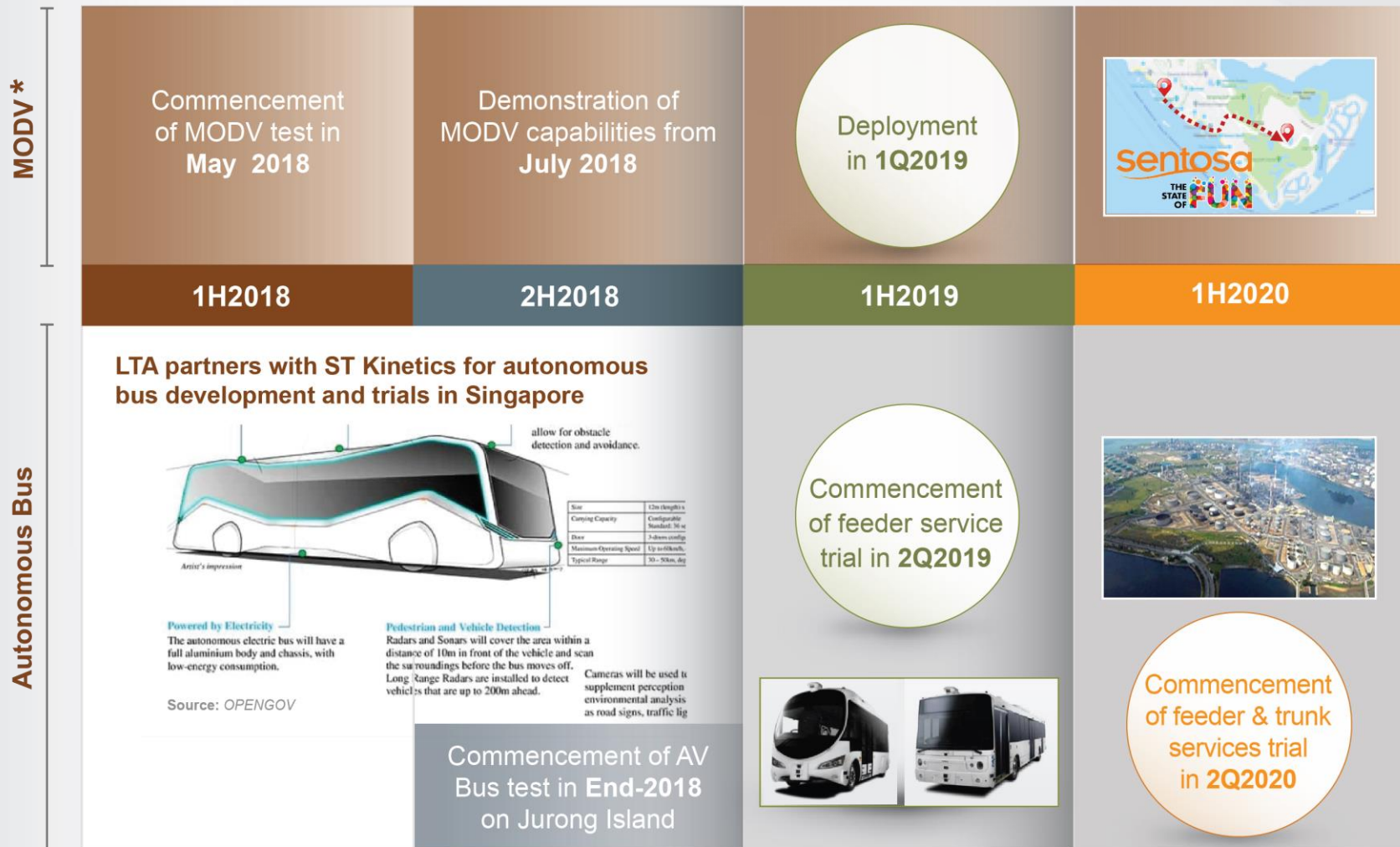
Testing &
Inspection



Maintenance Repair
and Overhaul

Autonomous Public Transport Solutions

Operationalising Bus Fleets



*Mobility on Demand Vehicles (MODV)

Autonomous Public Transport Solutions: Leverage Singapore Ecosystem



Key Stakeholders



Committee on Autonomous Road Transport in Singapore (CARTS)



Singapore Autonomous Vehicles Consortium

Smart Robotics for Every Smart City



Build Robotics Business



Deployed in 140+ US hospitals



Market leader in AMR* Segment



Achieved early success in industrial sector



Autonomous navigation



100,000+ deliveries / 600+km travel per week



Command Centre 24/7 operation support ready



Healthcare



Industrial



Hospitality



Lead geographies
US • Europe • APAC

* Autonomous Mobile Robot (AMR)

Build Robotics Business in Other Industry Verticals

Leverage capabilities for logistics automation in airports, seaports and warehouses

**Airport
Automation**



**Logistics
Automation**



**Industrial
Automation**



Partner local players and system integrators to:

- Enhance regional market penetration
- Collaborate on industrial automation

Pursue Growth Opportunities | Smart City

Significant
and growing
market
opportunity



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and end-to-end
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**THANK
YOU**

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