



INVESTOR DAY 2021

Smart Cities

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Disclaimer

Amounts stated in this presentation are denominated in Singapore Dollars unless stated otherwise.

The forward-looking statements in this presentation 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 especially given the evolving COVID-19 situation and its impact globally. Representative examples of these factors include (without limitation) travel and border restrictions, governmental orders on business closures, lock-down and movement restrictions, quarantines, disruption to global supply chains, 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.

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Our Smart City Vision in 2018

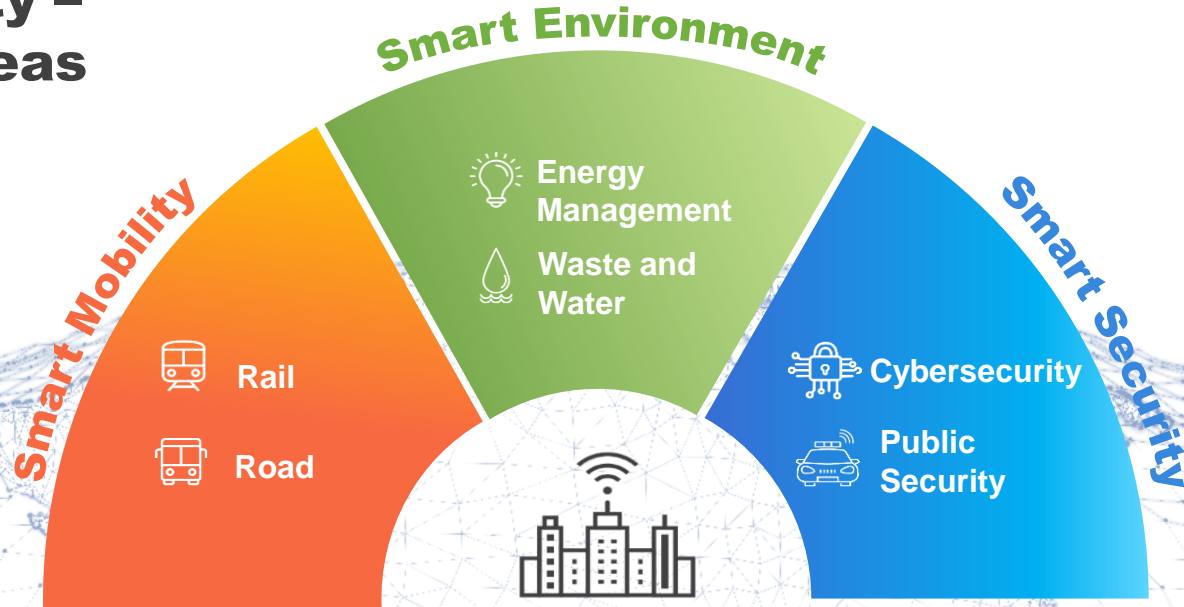


Pursue Growth Opportunities

Needs for Smart Cities enhanced by growing focus on Sustainability

Smart Cities

Smart City – Focus Areas



Over **700 projects** in more than **130 cities**



Data Analytics
& Artificial
Intelligence



Digital
Connectivity
& Cloud



Autonomous

Good progress despite impact from COVID-19

New Market Expansion



Queensland's Cross River Rail
1st Mobility Rail win
in Australia



Rio de Janeiro
>300k Smart Street Lighting
controls with AGIL IoT platform

New Business Areas



**Kaohsiung MRT
Red Line Extension**
Delivered turnkey Electrical &
Mechanical (E&M) systems



Land Transport Authority
Delivered 1st batch of
Electric Buses



Public Agency
One of the largest deployments of
a Smart Lift Monitoring solution

Data Analytics | Artificial Intelligence Enabled Solutions



Rail Enterprise Asset Mgmt Sys
Asset performance tracking with
data analytics



Punggol Digital District
Co-develop Open Digital
Platform for Smart Estate



Dubai iTraffic
Road Command & Control Centre
with state-of-art technologies

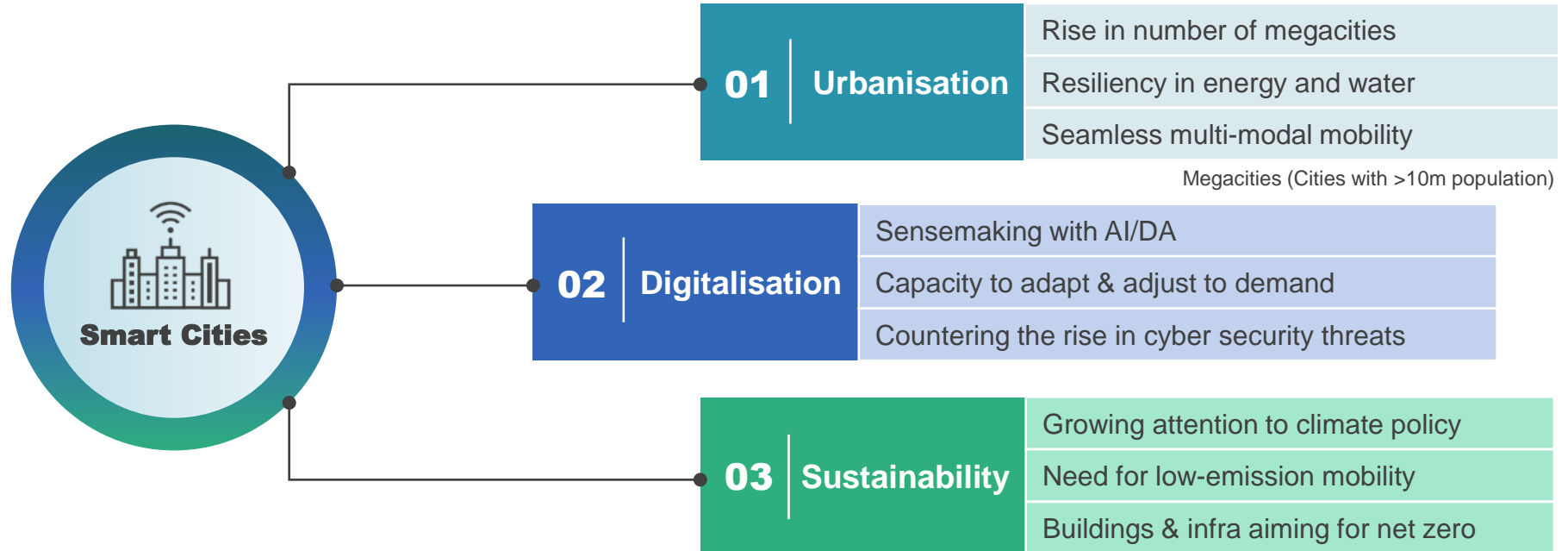


Autonomous Bus
Completed 3-mth commercial trial
at Jurong Island & Science Park 2



Overseas Customer
Development of next generation of
Emergency Response System

Urbanisation continues as COVID-19 drives digitalisation & sustainability



Relevant Smart City Market Size of ~US\$500B¹ in 2026

6 | ¹ Markets we have solutions for (specific segments within Mobility, Environment, Security)
Source: LEK Consulting, Homeland Security Corp Research, Northeast Research, KBV Research, ST Engineering in-house analysis, Deloitte Smart City Solution Centre

Doubling down on Smart Cities

Accelerating growth with new capabilities

Acquisitions & JV
Building new capabilities



- JV with SP Group
- SG's 1st fully digital Software Defined Network (SDN) for Service Providers



Acquired for €250m



Acquired for US\$20m



To acquire at US\$2.68b

Venture Investments
Nurture strategic capabilities in high-growth areas



Domains:

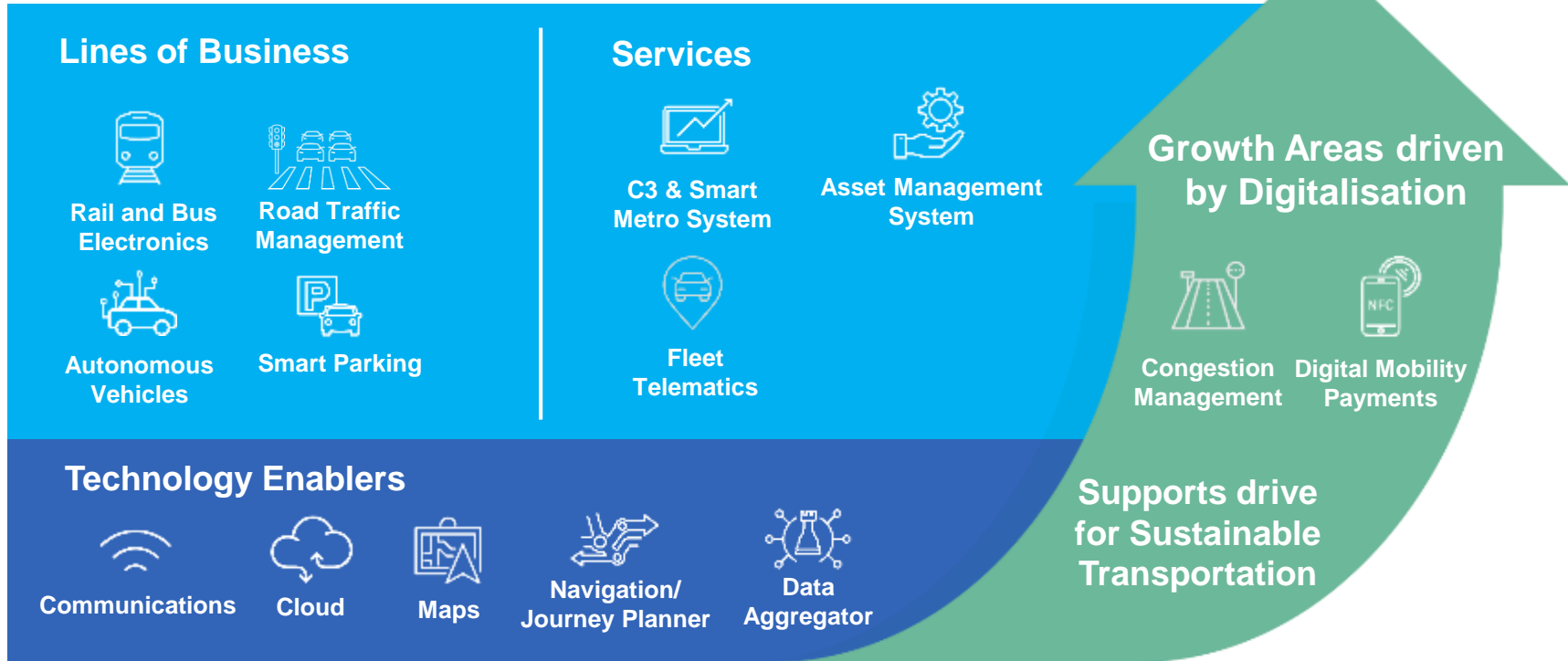
Mobility

Cybersecurity

Digital Connectivity & Cloud

Data Analytics

Accelerating growth with new capabilities



ST Engineering to acquire TransCore for US\$2.68b

Creating a Smart Mobility market leader and accelerating Smart City growth



- U.S. market leader in Electronic Toll Collection (ETC) solutions and Intelligent Transportation Systems
- Outstanding track record of project execution, customer retention and renewal
- Strong management team with deep industry experience
- Contracted to deliver first congestion charging project in the U.S. – Manhattan, New York



Combined portfolio positions us as a Smart Mobility Market Leader

- ✓ Enhance offerings through a **comprehensive suite of Smart Mobility products**
- ✓ Strengthen commitment to **sustainability** – **reduce traffic congestion** and **lower vehicle emissions**
- ✓ Achieve **synergies** through cross-selling **complementary products and solutions**
- ✓ Entry into **North American ETC** and **congestion pricing market**

Smart Environment enables greener & more sustainable cities

Enhance Operational & Energy Efficiencies

Utilities | Buildings | Estates | Campuses | Cities

- Platforms to monitor, communicate and control multiple IoT devices and sensors
- Support interoperability, cloud hosting and scalability



Support Transition to Electric Fleet

PTO | Commercial Fleet

- End-to-end suite: Charger – Charger Mgmt – Fleet Mgmt software
- Retrofit diesel to electric bus

PTO – Public Transport Operators



Provide IoT for Data Collection

Utilities | Buildings

- Front-end sensors to collect data
- Back-end platform to collate, analyse and decide



Positioning for Smart Security

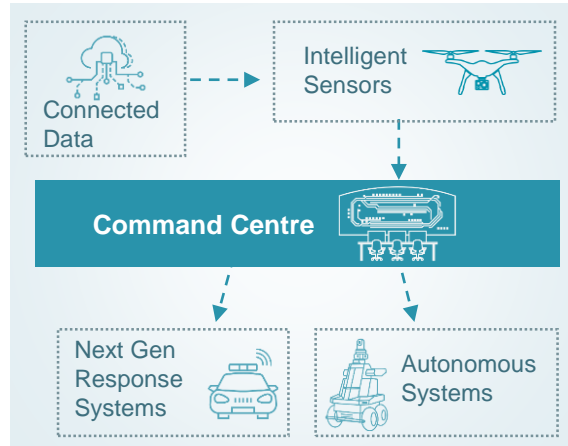
Smart Security solutions for Smart Cities

Integrated Security Management Platform



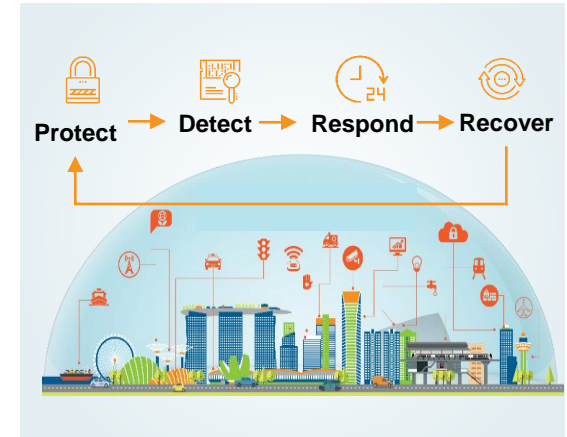
- Platform for situational awareness
- Scalable; allows centralised or distributed controls

Smart Sense & Response for City Management



- Observe-Orient-Decide-Act (OODA) with DA/AI enabled systems
- Support collaborative and predictive decision making

Smart Cybersecurity



- Build resilient and secured digital future
- Protect critical information infrastructures

Industry leading Satcom ground segment technology provider

Acquisition of Newtec Group NV



- ✓ Unique ultra-high throughput capabilities & industry-leading bandwidth efficiency technology
- ✓ Enlarged IP and differentiated product portfolio addressing all market segments

Acquisition of Glowlink Communications Technology



- ✓ Complementary product suite to existing advanced bandwidth-efficient, highly secured satellite solutions
- ✓ Enhanced resilience against signal interference

1 Platform of choice with Market leadership across key segments



Maritime



Aero



Enterprise



Military



Broadcast

2 Best-in-class Satcom Solutions



Ground System for
03b mPOWER Next-Gen
MEO Constellation



Industry's Most Efficient
Dynamic Return Technology

Well-positioned to capitalise on growth opportunities

Significant Increase in Capacity

- >24,000 new satellites to be launched by 2030¹ (GEO / MEO/ LEO)
- Reduced bandwidth costs and lower latency

New Demand and Use Cases

- Growing demand for connectivity
- Increased focus on secure, resilient Defence Satcom
- Satellite interoperability with terrestrial Cloud and 5G networks unlocks new use cases

Development of Next-Generation Platform



End-to-end network management and optimisation for multi-constellations across multi-orbits



Take advantage of opportunities in hybrid satellite and terrestrial Cloud and 5G networks

Digital Business as a new growth pillar

Leverage strong track record in Cyber, Cloud & Analytics

OT / IT Cyber Services & Products



Cloud



Data Analytics Applications



Build deep capabilities through R&D and strategic Investments

Quantum Cryptography



Professional & Managed Services for Hybrid & Multi Cloud



Artificial Intelligence



Expand into local and overseas Enterprise Customers

Healthcare



Financial Services



Other Enterprises



Critical Infrastructure



Cyber Secure



High Trust

Accelerating Smart City growth

Smart Mobility

- Building a Smart Mobility market leader
- Harness mobility data, digital payment capabilities

Smart Environment & Sustainability

- Enabling smarter utilities and infrastructure
- Support fleet operators' electrification journey

Smart Security

- Provide scalable security platforms enabled by DA, AI and 5G
- Empower a secured digital future

Smart Digital Connectivity

- Strengthen Satcom market leadership; roll-out of next-gen platform
- Offer cloud management platform / services for enterprise applications
- Offer resilient & flexible Software-Defined Networks



Capture growth at the intersection of **Urbanisation, Digitalisation & Sustainability**



Adopt Global Outlook,
Local Implementation



Integrate Global
Workforce &
Talents



Leverage Group
Engineering &
Tech capabilities



Provide Thought
Leadership on
Smart Cities



Thank you