

Singtel Investor Day 2019

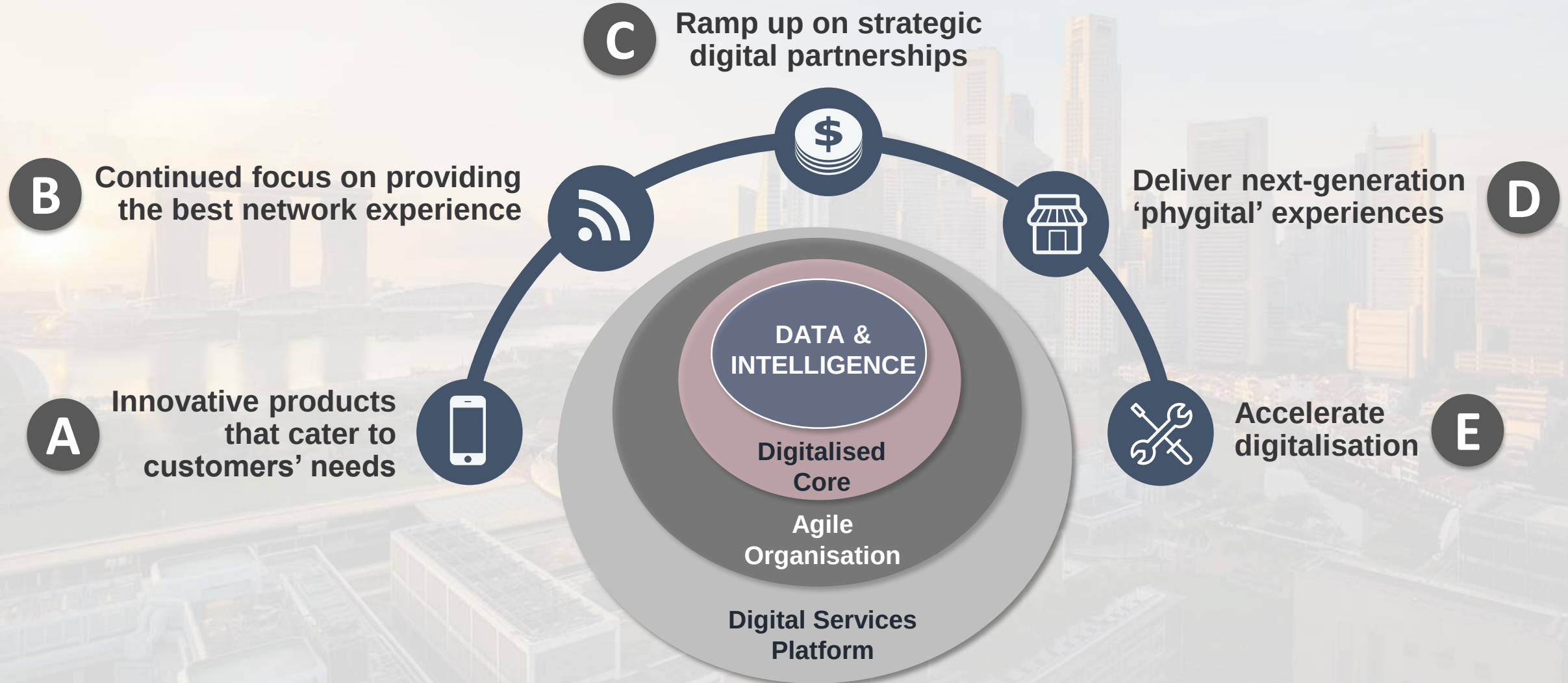
Consumer Singapore

Yuen Kuan Moon
CEO, Consumer Singapore

June 11, 2019



Evolving into a digital telco of the future



A

INNOVATIVE PRODUCTS & SERVICES

GOMO (Get Out More Often)

gomo
Less fuss. More fun



Freedom



Convenience



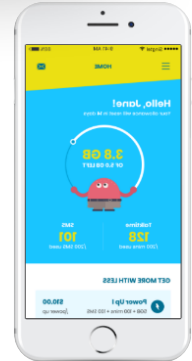
Value



\$20

- 20 GB
- 200 mins
- 200 SMS
- Free Caller ID

- No-contract SIM-Only
- All-Digital (buy online and get help online!)
- Pay upfront with no bill shock
- On-demand data add-on
- eBill with automatic recurring payment



A

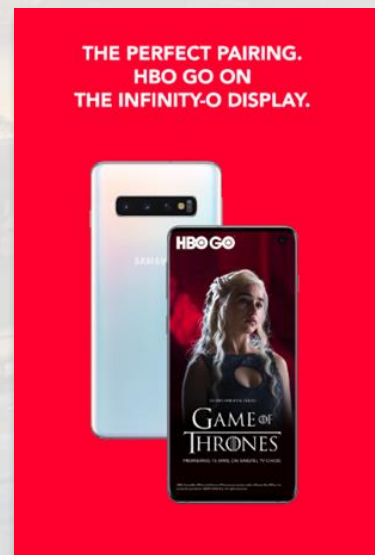
INNOVATIVE PRODUCTS & SERVICES

Providing content and data to match customers' lifestyles

Wide variety of content, paired with big data offers



Exciting phone launches



Samsung Galaxy S10



Google Pixel 3a (Singtel exclusive)

Mobile Data Revenue

CAGR

16%

FY17

FY18

FY19

A

INNOVATIVE PRODUCTS & SERVICES

Enhancing value and customer engagement



Greater home Wi-Fi connectivity



Wi-Fi Mesh

MySingtel App provides 24/7 instant, convenient access to many services

**UNBOX
12 MONTHS OF
AMAZON PRIME
ON US.**



ENJOY FREE SUPER FAST 2-HOUR LOCAL DELIVERY ON
TENS OF THOUSANDS OF ITEMS ON PRIME NOW AND MORE.

Limited time only!

SIMPLY BUNDLE
1Gbps
Fibre Broadband

AND ENJOY
12 MONTHS
of Amazon Prime

Visit Singtel Shop or singtel.com/prime.

Singtel | amazon prime
Because with Singtel, you can.

Terms and conditions apply. Offer subject to change. Your Prime membership continues after the 12-month promo period until cancelled. Singtel will charge you S\$5.50/month starting on the 13th month onwards. Cancel anytime by contacting Singtel. Amazon.com, Inc. and its affiliates are not sponsors of this promotion. Amazon, Prime, Prime Video and all related logos are trademarks of Amazon.com, Inc. or its affiliates.

Singtel | RAZER™



**SINGTEL FIBRE
PRO GAMER BUNDLE**
1+1Gbps

Hello

Singtel Power

Switch now and get 30% off
your power bill and more!

Mobile
Billing cycle 03 Jun to 02 Jul

LOCAL ROAMING

10.28 GB / Unlimited GB used

14 / Unlimited Mins used

3 / Unlimited SMS used

MANAGE PLAN AND ADD-ONS

TV

Home Digital Line

Fibre

Home Digital Line

Mobile Broadband

Top Up Services

**TOP UP PREPAID
HII SIM CARD**

**TOP UP SINGTEL
DASH**

HOME **BILLS** **SHOP** **REWARDS** **MORE**

B

CONTINUED FOCUS ON THE BEST NETWORK EXPERIENCE

Decommission old platforms

Migrated our analogue voice on copper platform to digital



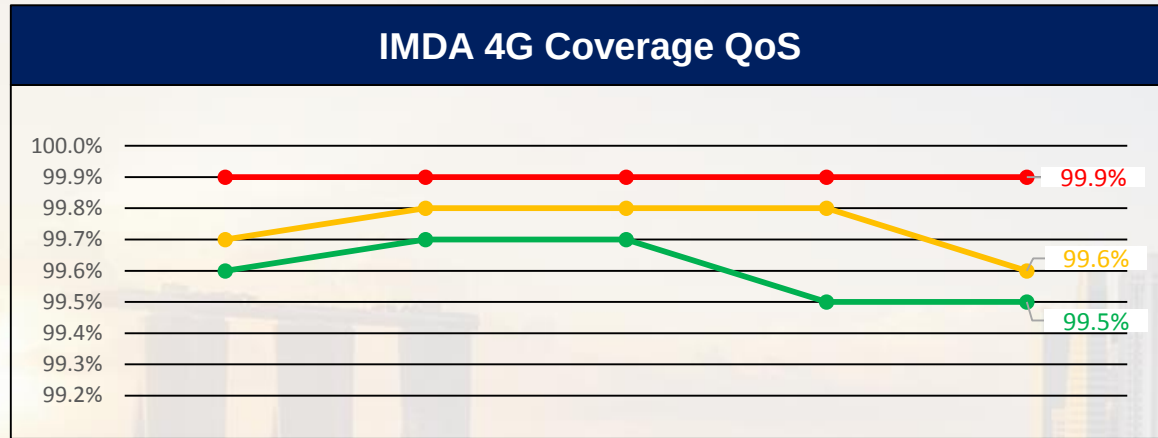
Power-down the last
analogue voice switch

- Long-term >5 years progressive replacement of voice switches
- Contributed to Singtel Group cost reduction targets, through lower Operating Expenditure
- Monetised through harvesting of copper

B

CONTINUED FOCUS ON THE BEST NETWORK EXPERIENCE

Evolving towards infrastructure of the future



Singtel has led the market for 17 consecutive quarters



Peak LTE speeds of 1.5Gbps



Launch of 5G Garage with Singapore Polytechnic



one-north 5G capabilities test bed



First overseas 5G AR video call

C

STRATEGIC DIGITAL PARTNERSHIPS

Establish new partnerships and business models

Singtel | Geneco™

SINGTELPOWER

SINGTELPOWER | Geneco™

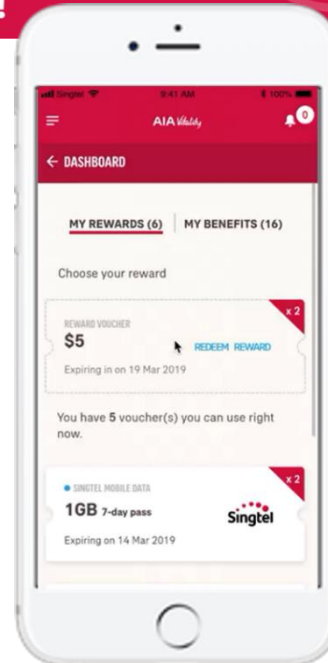
Online Exclusive:
30% OFF
WITH UP TO
\$108 SAVINGS
on your power bill!



Singtel | AIA

AIA Vitality

**SAY HELLO TO OUR NEW
WEEKLY REWARD PARTNER,
SINGTEL!**



Singtel | GOJEK

Exclusive benefits to drivers

- 20% off combo plans
- Free caller ID
- Free data on Driver App (up to 2GB)





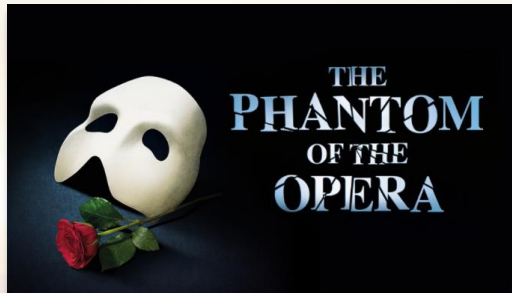
STRATEGIC DIGITAL PARTNERSHIPS

Access to priority sales and exclusive deals

SINGTEL MUSIC



Singtel Rewards



SINGTEL
NEWSSTAND



D

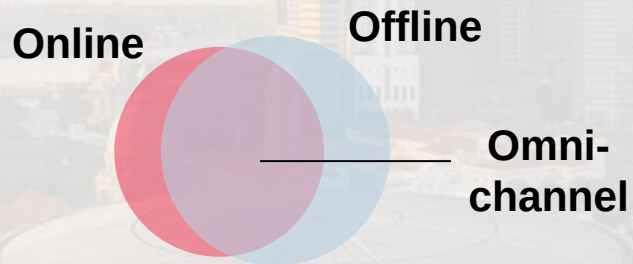
NEXT-GENERATION 'PHYGITAL' EXPERIENCE

Online-to-offline integration - omni-channel experience

Market-first
'Phygital' Innovations

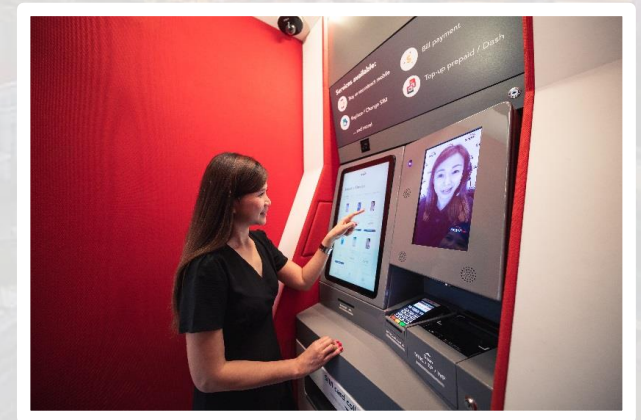
Any Time, Anywhere,
Any Mode

Fully Integrated
Omni-channel



- Next-gen Singtel Shop @ Comcentre

- Drive shift towards online
- Industry-leading omni-channel experience



D

NEXT-GENERATION 'PHYGITAL' EXPERIENCE

UNBOXED by Singtel



Combining Intelligent Design



24/7
accessibility



Pop-up &
movable



Flexible &
modular



Hybrid solar-
power

With Powerful Technology



Personalised
with facial
recognition



Easy-Assist with
Video Chat
& Live Bot



Secured by
Sentinel Security
System (NCS)



Buy & collect now
with POPStation
(dynamic prefill)

E

ACCELERATE DIGITALISATION

Through analytics and Agile methodology

Data
Analytics

Core business

Upselling &
cross-selling



Contextual
targeting



Product
churn



VAS
model



Automation

Agile way of
working

Drive outcome
(Minimum Viable Product)



Analytics &
Segmentation



Digital
Services



Mobile Plans
& VASes



AI / Machine
Learning



Hybrid
Native App



Broadband
Plans & VASes



IVR

E

ACCELERATE DIGITALISATION

Through automation, process re-engineering & job re-design

Automate first

Robotics Process Automation & other automation tools

- Automate routine, low-value processes
- Man hours freed up for employee to focus on high-value tasks



Digital capabilities

Job re-engineering and re-design

- From single to multi-functional employees
- From manual, repetitive tasks to higher value-chain tasks



- Call agents
- Manual resource planning
- Manual quotation checking
- Manual invoice tracking



- Live chat / video agents
- Empowered by data analytics tools
- Project management
- Attending to urgent transmission issues



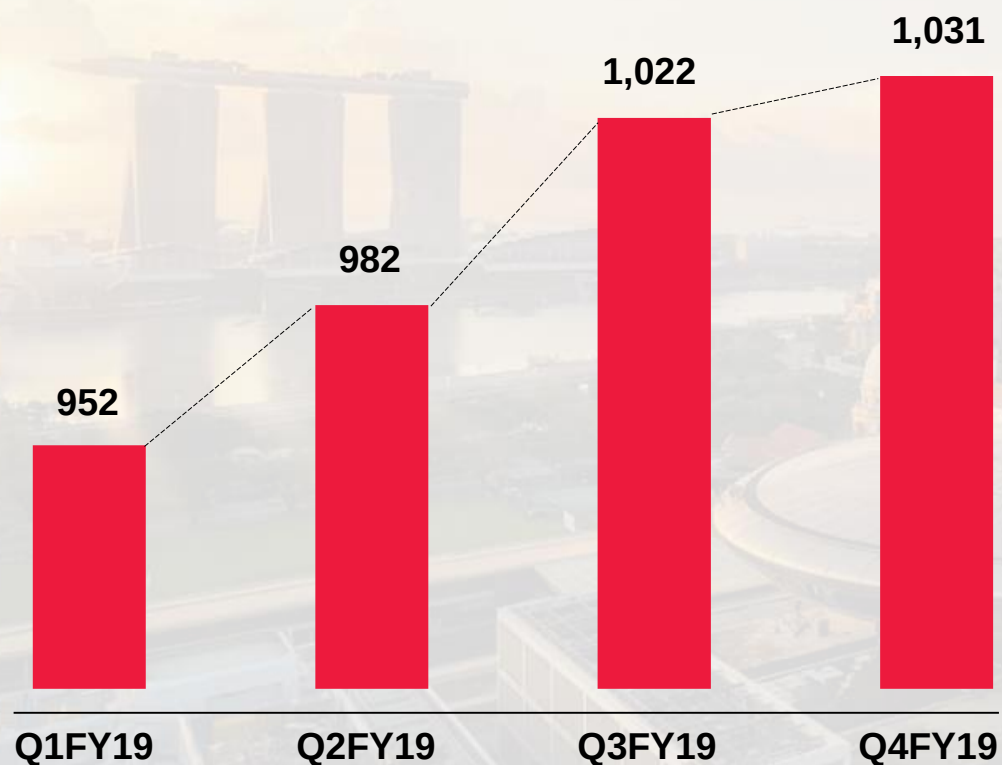


ACCELERATE DIGITALISATION

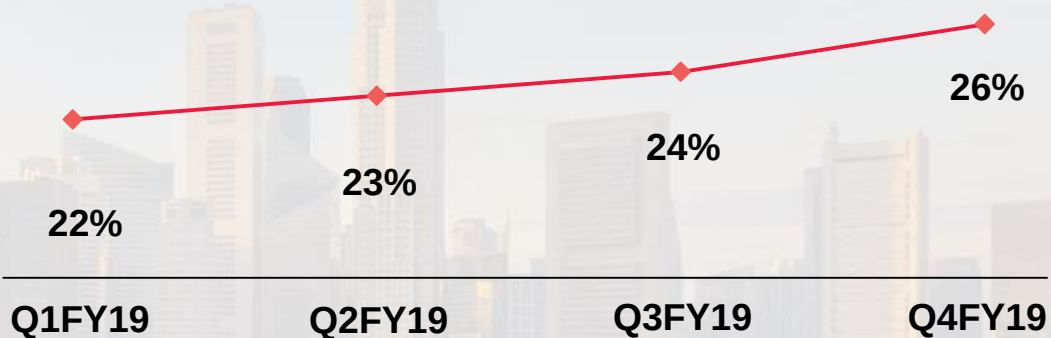
Drive productivity & better customer experience

Monthly active app users ('k)

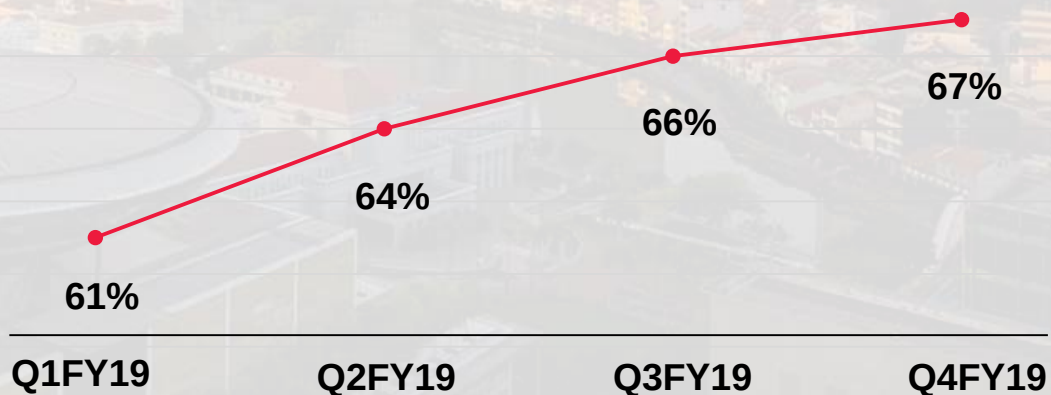
■ My Singtel App Users



% of online sales transactions



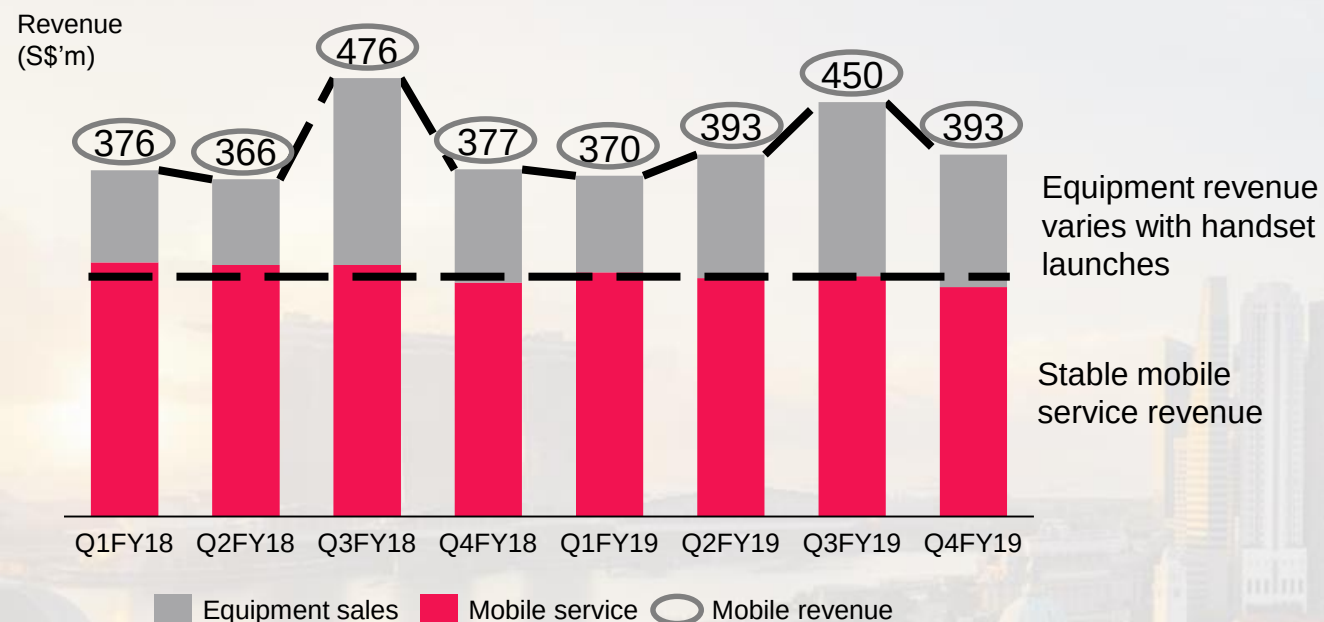
% of self-help transactions



For more information
Mobile service revenue

Mobile service revenue remains stable

Despite industry trends & impact from IFRS15¹



Service revenue impacted by:

- Lower voice usage & data competition
- Increased SIM-only penetration
- Adoption of IFRS15
 - Bundling discount on handset plans is “amortised” against service revenue
 - Amortisation influenced by mix of premium handsets

IFRS15

Higher standalone selling prices of handsets²



Higher bundling discount³
(or contract asset)



Higher amortisation against mobile service revenue

1. IFRS15 (Revenue from contracts with customers) adopted with effect from 1 April 2018.
 2. Assuming any change to Singtel's cost of handset is matched by an equivalent change in customer upfront payments for the handset.
 3. Bundling discount refers to difference between standalone selling prices of handsets and customer upfront payment for handsets.



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