

A night-time photograph of the Singapore skyline, featuring numerous illuminated skyscrapers and buildings along the waterfront. The lights from the buildings are reflected in the water in the foreground. A large red curved shape is overlaid on the top right corner of the image.

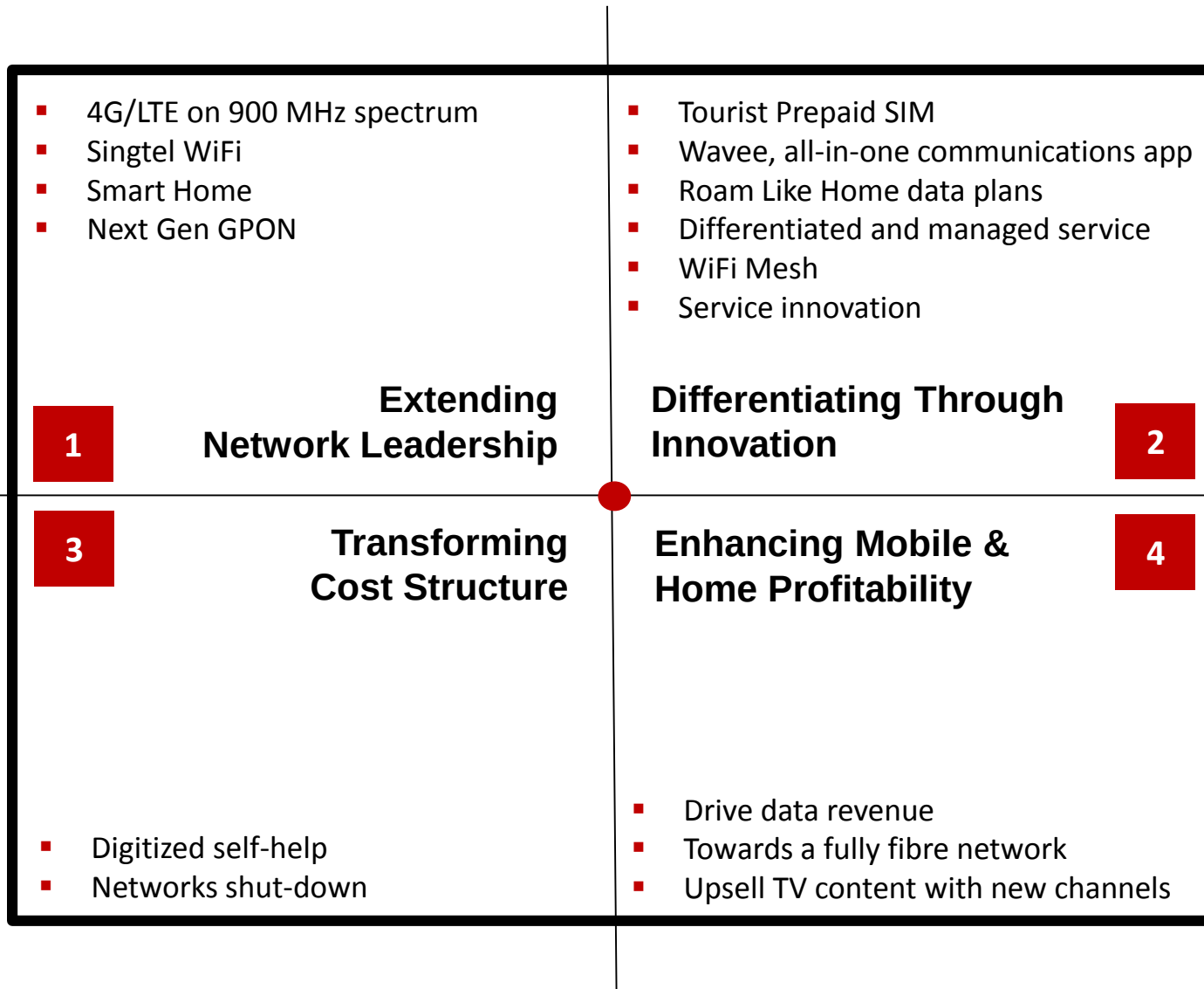
Singtel Investor Day

Consumer Singapore

Yuen Kuan Moon
CEO, Consumer Singapore

Singapore Consumer Business

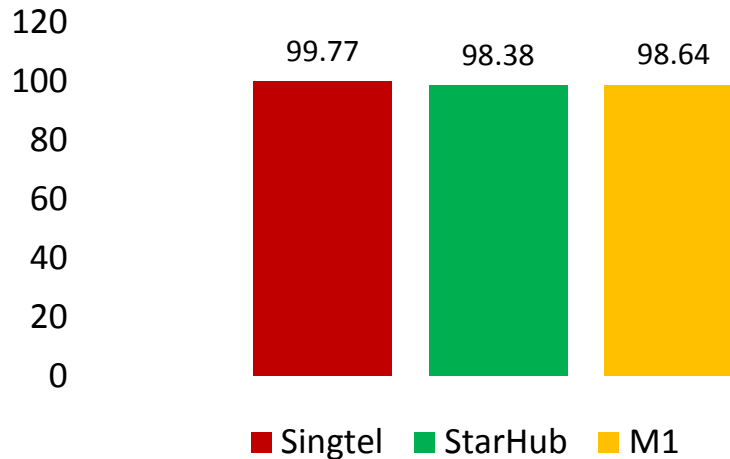
4 Strategic Thrusts



Extending Network Leadership (Mobile)

Superior
4G service
coverage

iDA Nationwide Outdoor Service Coverage [%]
(Measured in Q1 2015)



Leverage 900MHz spectrum to achieve deeper 4G/LTE coverage indoors and underground

Additional 2GB data on Singtel WiFi

>50% of Combo Plan customers are already using Singtel WiFi

Increase Singtel WiFi coverage beyond current 400 access points to 1,000 access points by end FY 2016

Will start charging for excess usage later in the year

Singtel
WiFi at
more
locations



Extending Network Leadership (Home)

Singtel
Smart
Home



Participated in HDB's lab trial, and will proceed to engage in field tests in Yuhua HDB blocks (total: 3,300 units)

Focus is on eldercare, energy and water management

10 Gbps
GPON Trial



First in Singapore to trial 10Gbps Next Generation GPON on fibre network

Differentiating Through Innovation (Mobile)

Tourist
Prepaid
SIM



Revenue opportunity from >15M tourist arrivals per year

Offers low price options with data allowance over shorter validity period

Wavee



Wavee VoIP Out enables calls over data, from overseas to any Singapore number by 2nd half of 2015

Roam
Like
Home



Roam Like Home (Malaysia) plan at S\$10/GB was launched in Oct 2014 and contributed to increase in Malaysia data roaming traffic by >2.5x YoY

Roam Like Home (Australia) was launched on Apr 2015

Differentiating Through Innovation (Home)

Home
Network
Specialists



Home Network Specialist team offers end-to-end service to solve connectivity issues found in larger homes

- Recommend solutions
- Help optimise WiFi coverage in home
- Installation & maintenance service

WiFi Mesh

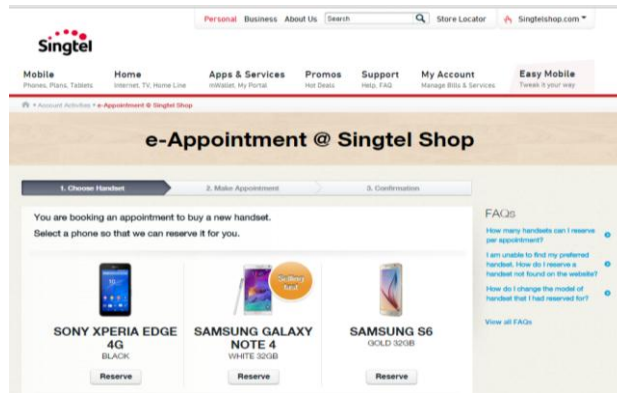


WiFi Mesh improves coverage for larger homes without need for hardwiring

Trials started on 5 May 2015

Differentiating Through Innovation (Service)

E-
Appointment
@ Singtel Shop



>3k e-Appointments made since launch in Jan 2015

Simplified customer journey and shorter waiting time

Preferred
customer
care call-
back time



>600 bookings made since launch in Mar 2015

Service at their convenience

New Retail
Concept

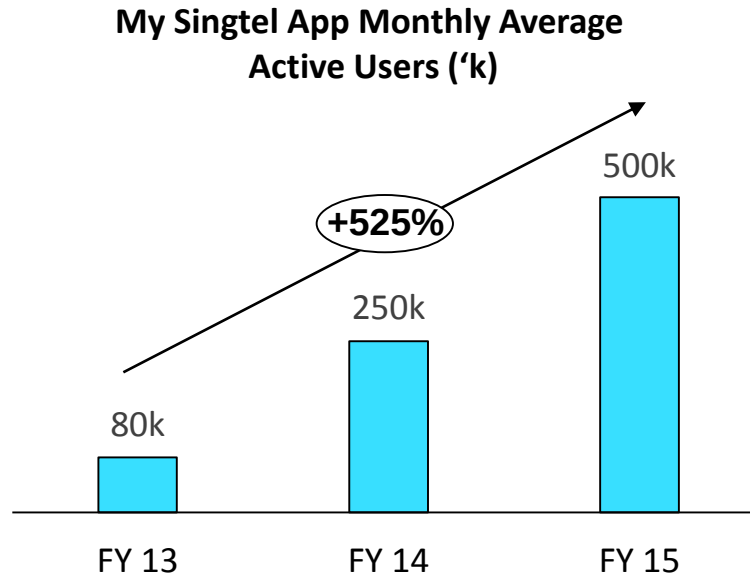


A more interactive, immersive and intuitive customer journey

Pilot shop launched at Causeway Point

Transforming Cost Structure

Digitisation & Automation



Virtual Agent Shirley

- 2.5k questions/day
- Response accuracy of 88%

Enable more transactions on digital channels such as My Singtel App

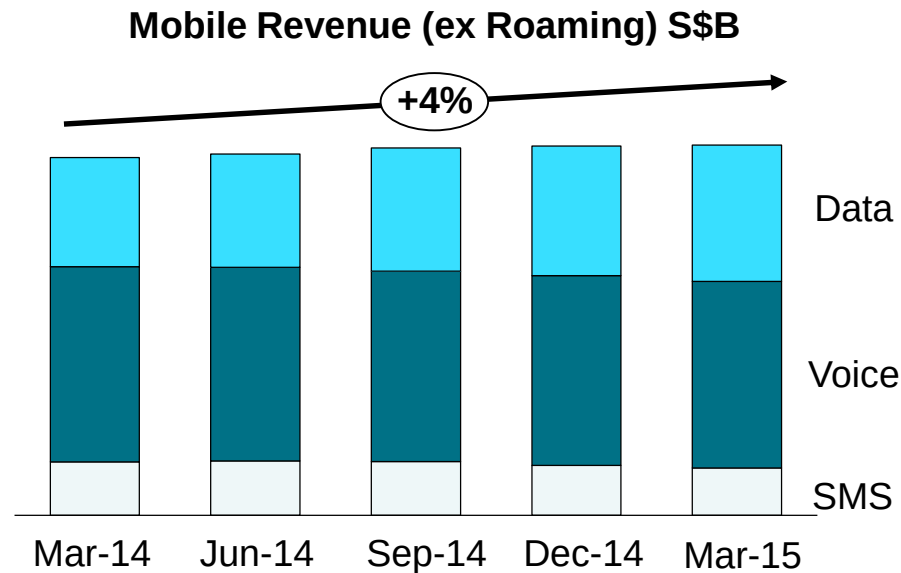
Networks Shutdown



Shut-down of 2G and ADSL networks

Enhancing Profitability (Mobile)

Driving
Data
Revenue



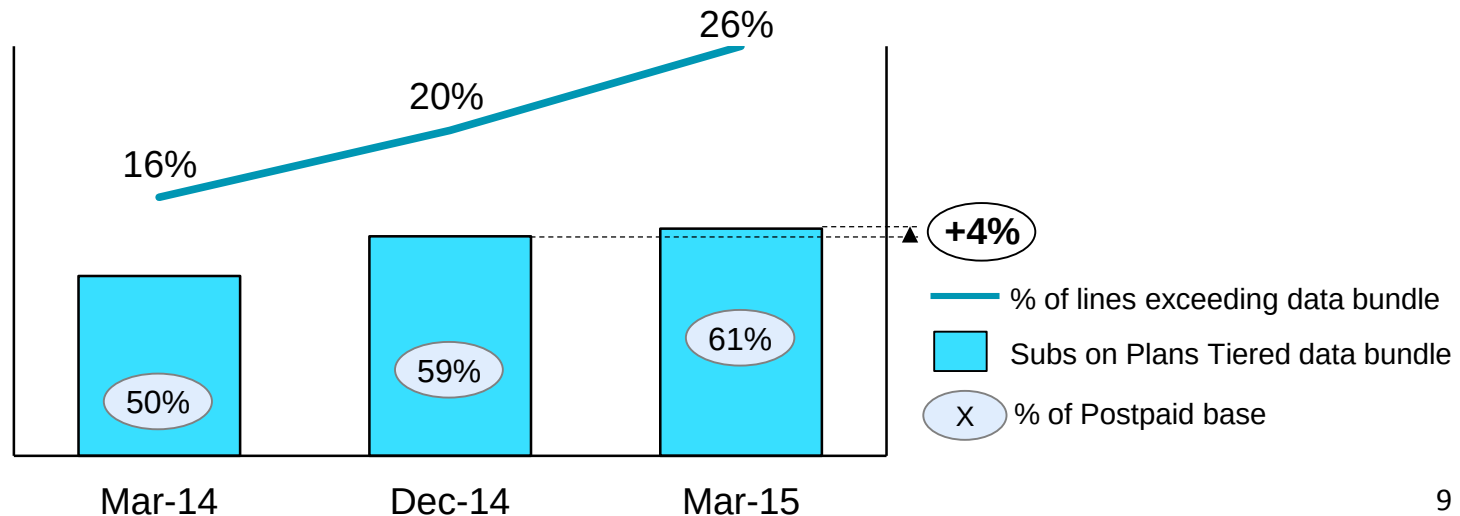
61% of postpaid customers are currently on tiered data plans.

26% exceed their data bundle

Data services contribute to 37% of total postpaid ARPU

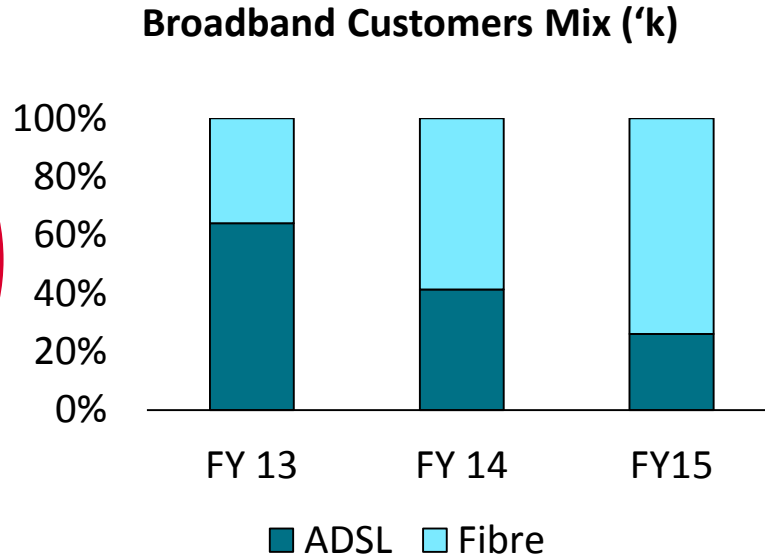
Continue to drive prepaid data usage

Postpaid customers on Plans with tiered data bundles



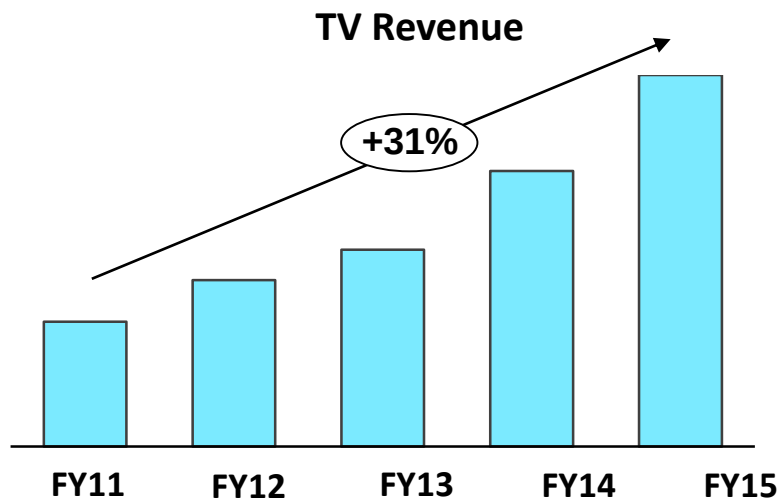
Enhancing Profitability (Home)

Migrating
Customers
to Fibre



>90% of our customers will be on fibre services by end of FY 2016

Upselling of
TV Content



New TV channels drive take-up of content packs, revenue and ARPU growth



Disclaimer: This material that follows is a presentation of general background information about Singtel's activities current at the date of the presentation. The information contained in this document is intended only for use during the presentation and should not be disseminated or distributed to parties outside the presentation. It is information given in summary form and does not purport to be complete. It is not to be relied upon as advice to investors or potential investors and does not take into account the investment objectives, financial situation or needs of any particular investor. This material should be considered with professional advice when deciding if an investment is appropriate.