



Singtel Investor Day Group Digital Life

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3 June 2015

Agenda

INTRO

Group
Digital Life

01

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02

HOOQTM

03

DataSpark

GDL was set up to create value for Singtel in two distinct ways



Key learnings from our GDL efforts so far

1 Focus on businesses that can move the needle

2 Deploy a regular and ruthless discipline to venture management

3 Focus on key operational metrics in the early stages

4 Create appropriate balance between sufficient autonomy and central oversight

5 Do not commit to an initiative without a willingness to “invest to win at scale”

6 Digital companies require specialized talent

The result: a three-pronged approach for managing our digital portfolio and innovation capabilities

Three core businesses

DIGITAL MARKETING

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ADVANCED ANALYTICS

DataSpark

PREMIUM VIDEO

HOOQ™

Local and OpCo-led portfolio



DIGITAL PAYMENTS



E-COMMERCE 2.0



DIGITAL CALLER ID



HYPERLOCAL



INFOTAINMENT



CONTENT (MUSIC/NEWS)

Innovation Engine

Singtel
innov8

- Fund size: **US\$250M**
- 48 investments in 9 countries
- Innov8 has 2 sub-teams with the integration of Lifelabs:
 - Investments: scouting and investments
 - Business Development: liaison between startups and BUs



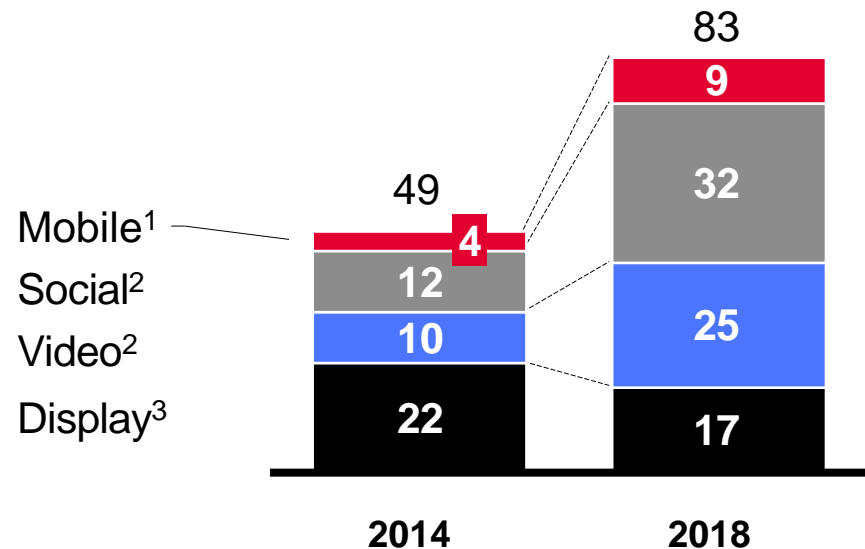
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(n.) the company defining digital marketing

Digital Advertising Market continues to explode

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Global Advertising Spend By Channel US\$b



CAGR

15%

27%

25%

-6%

Key Trends

- Explosive growth in social, mobile and video channels
- Shift from siloed, audience-based to cross-device, user-level targeting
- Desire for more real-time, spontaneous advertising

1 Mobile display; 2 Mobile and Desktop; 3 Desktop display

SOURCE: McKinsey Global Media Report 2013, Magna Report 2013, Business Intelligence, eMarketer

Amobee's Vision is to be the Leader in Real Moment Marketing Technology

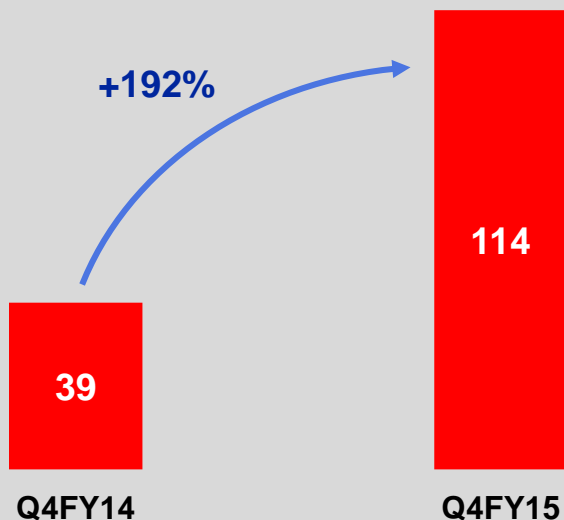
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Acquisition of **Adconion Direct** and **Kontera** to offer the most advanced cross channel digital marketing technology platform and solution.

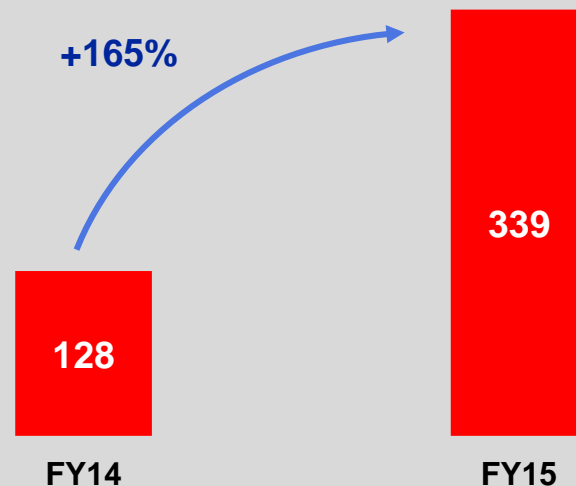


Amobee is starting to achieve scale with this strategy

Amobee Q4 FY15 Revenue (S\$m)¹



Amobee FY15 Revenue (S\$m)¹



1. Before intercompany eliminations.



HOOQ™

1.7 billion people Multiple platforms

- >10,000 Hollywood and local movies and TV series
- Multi-device access
- Unlimited viewing via streaming and download
- Market leading low-priced monthly subscription-based video service

Launched



Philippines

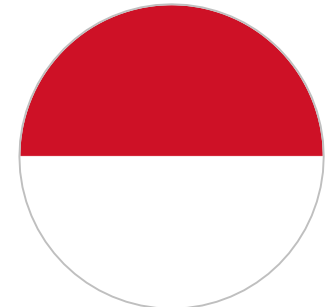


Thailand

Coming Soon



India

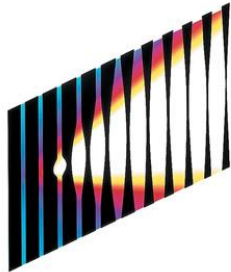


Indonesia

Joint venture between Singtel, Sony Pictures & Warner Bros.



Let's make everyday better



SONY
PICTURES



- Leverage on the Singtel Group's **550 million** mobile customers
- Major Hollywood studios, providing **premium content**, know-how for content procurement & programming for HOOQ
- Initial share capital of **US\$ 28 million**
- Equity holding of **65% by Singtel**; 17.5% each by Sony Pictures & Warner Bros.

DataSpark

clarity redefined





Always on,
always connected

Unrivalled
richness and
continuity of
consumer
dataset



Finger-tip Geo-
analytics to see the
“what”

Quick, easy
analysis of
consumer
behavior, crowd
movement &
lifestyle choices



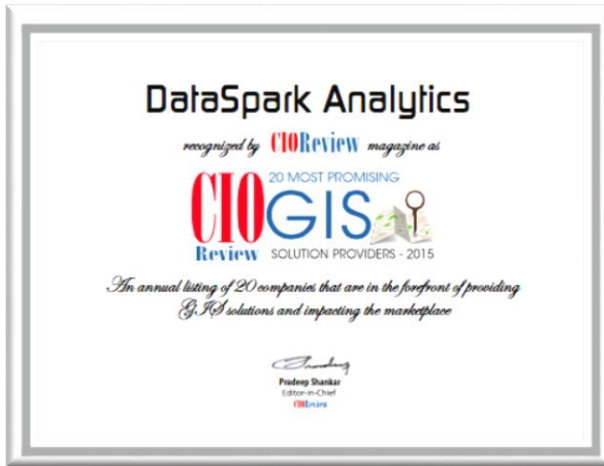
Panel insight to
uncover the “why”

Fast , accurate
and represen-
tative analysis of
consumer
attitudes and
decisions



Market-driven,
market-tested

Proven insight to
address wide-
ranging business
challenges



Buyer Case Study

Buyer Conversation: DataSpark's Journey in Establishing Analytics Business

Most Advanced Approach to Analytics

telecomasia



GeoAnalytics software

- **Patent-pending** software to produce mobility intelligence
- Regional Telcos have entered into **multi-year licensing deals** for:
 - Revenue stimulation and retention
 - Operational efficiency/cost optimization
 - New revenue streams

Insights as a Service

- **Analytics consultancy services** using the insights generated by own GeoAnalytics software
- Engaged by various **Singapore Government agencies** for city and transportation planning

Conclusion



SHARPENED FOCUS



**GROWTH ON GLOBAL
SCALE AND LONG-TERM
VALUE CREATION**



**Group
Digital Life**



**CONTINUAL EXPLORATION
OF NEW TECHNOLOGIES**



FINANCIALLY DISCIPLINED



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