



# INVESTOR DAY

22 MARCH 2018

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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.

# DEFENCE EXPORT

CHEW MEN LEONG  
*CHIEF MARKETING OFFICER*

# The Push for Defence Export

## Our heritage



Developed military platforms and systems for Singapore Armed Forces

## Our achievements



Successes in global markets against international competition

## New growth opportunities



Leverage track record, stronger push for defence export

# Successes in Global Market



Battle-proven Warthogs deployed in Afghanistan (2009)



Patrol Vessels for Royal Navy of Oman (2012)



Landing Platform Dock for Royal Thai Navy (2012)



Terrex 2 down-selected by US Marine Corps for Amphibious Combat Vehicle 1.1 program (2017)



HMX transmission for US Marine Corps' Amphibious Assault Vehicle Upgrade (2017)



World market leader for 40mm ammunition

# Global Market Trends and Challenges

Global market projected at US\$1.7t annually

## Opportunities:

- US as the largest market, with steady growth
- Strong growth in the Middle East (9%)
- Increasing homeland security opportunities

## Market trends:

- Upgrades of existing platforms
- Lowest Price Technically Acceptable solutions
- Demand for readily deployable solutions

Geo-political issues may constrain defence export sales

May require localisation, transfer of technology and offset



# Focus for Defence Export

## Digitised Armoured Platforms



Next-Generation Armoured Fighting Vehicle



Infantry Fighting Vehicle (Terrex)

## Advanced Command & Control Systems



Vehicular Integrated Communication System



Integrated Battlefield Management System

## State-of-the-art naval ships



Independence class Littoral Mission Vessel



Landing Platform Dock

## Wide range of ammunition



40mm Ammunition



120mm Precision Mortar Ammunition

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# Strong Value Propositions

Our value propositions position us well against competitors

**Improving survivability:**  
Enhance warfighting and protection



Soldier Parachute  
Aerial Reconnaissance  
Camera System for  
surveillance



Next-Generation  
Armoured Fighting  
Vehicle with 'closed  
hatch' fighting

**Improving connectivity:** Network-centric  
and good situational awareness



Vehicular Integrated  
Communication  
System for military  
forces



Integrated Battlefield  
Management System  
for better situational  
awareness and faster  
decision

# Strong Value Propositions

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Smart Soldier System



Unmanned Aerial Vehicle



Unmanned Ground Vehicle

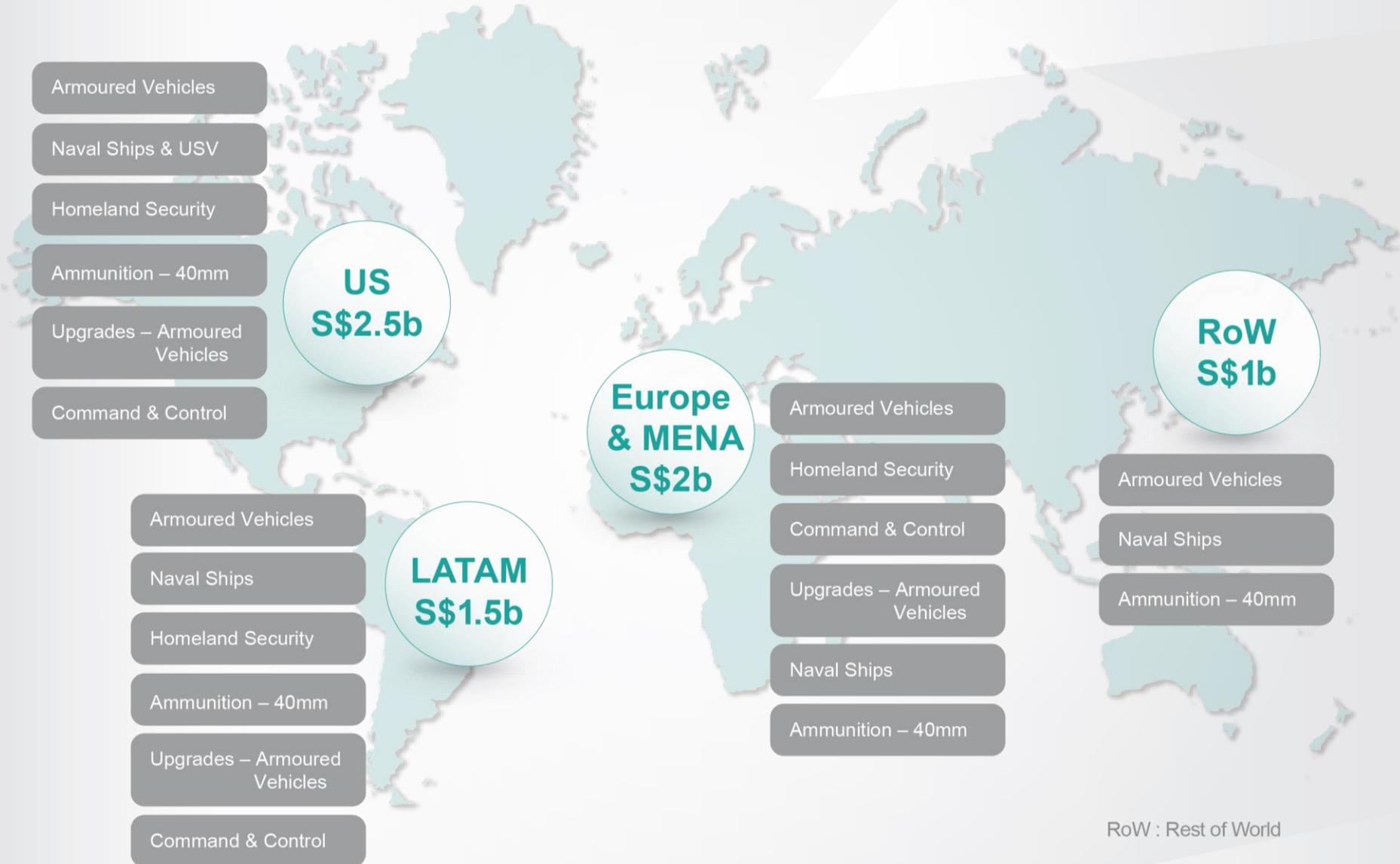


Unmanned Surface Vehicle (USV)

## Ready for the future battlefield: Exploitation of smart systems, robotics and unmanned systems

- Our smart soldier system unburdens the soldier, enhances situational awareness and improves his warfighting capabilities
- Robotics and unmanned systems support the concept of manned and unmanned teaming for the future

# Our Focus Markets



RoW : Rest of World

# Pursue Growth Opportunities – Defence Export

Leverage  
proven successes  
in defence  
capabilities and  
export wins



Focus on developing  
targeted products and  
solutions

Focus on  
specific markets

**Defence Export**

# MARKETING

CHEW MEN LEONG

*CHIEF MARKETING OFFICER*

# Customers & Marketing



**ST Engineering  
Masterbrand**



**Build marketing presence  
and capabilities**



**Develop new  
capabilities**



# Achieving Synergies

## One ST Engineering Brand

### Strength

Combine collective strengths of Aerospace, Electronics, Land Systems and Marine sectors, to provide integrated, end-to-end, solutions



### Masterbrand

Allows for more effective communication with customers and business partners



One Masterbrand + 4 Sector Descriptors

# Presence in 22 Countries and 44 Cities

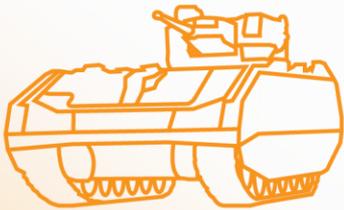
Building a stronger network of international marketing offices



**LEGEND:**

-  International marketing office
-  Global office

# Go-to-market Strategies



Defence Export

- Provide integrated solutions
- Focus on one masterbrand
- Increase our local presence
- Expand strategic partnerships and joint ventures
- Leverage Singapore as reference market
- Widen the range of go-to-market models



Smart City



**THANK  
YOU**

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