



# INVESTOR DAY

22 MARCH 2018

# DISCLAIMER

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

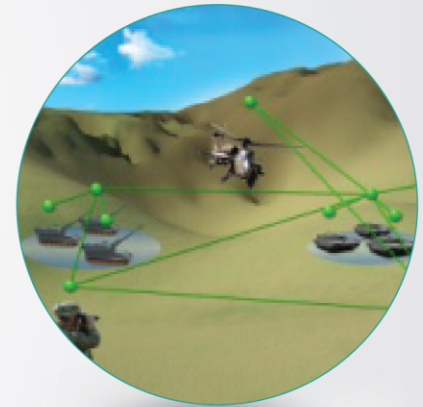


Next-Generation  
Armoured Fighting  
Vehicle with 'closed  
hatch' fighting

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

Our value propositions position us well against competitors



Smart Soldier System



Unmanned Aerial Vehicle



Unmanned Ground Vehicle

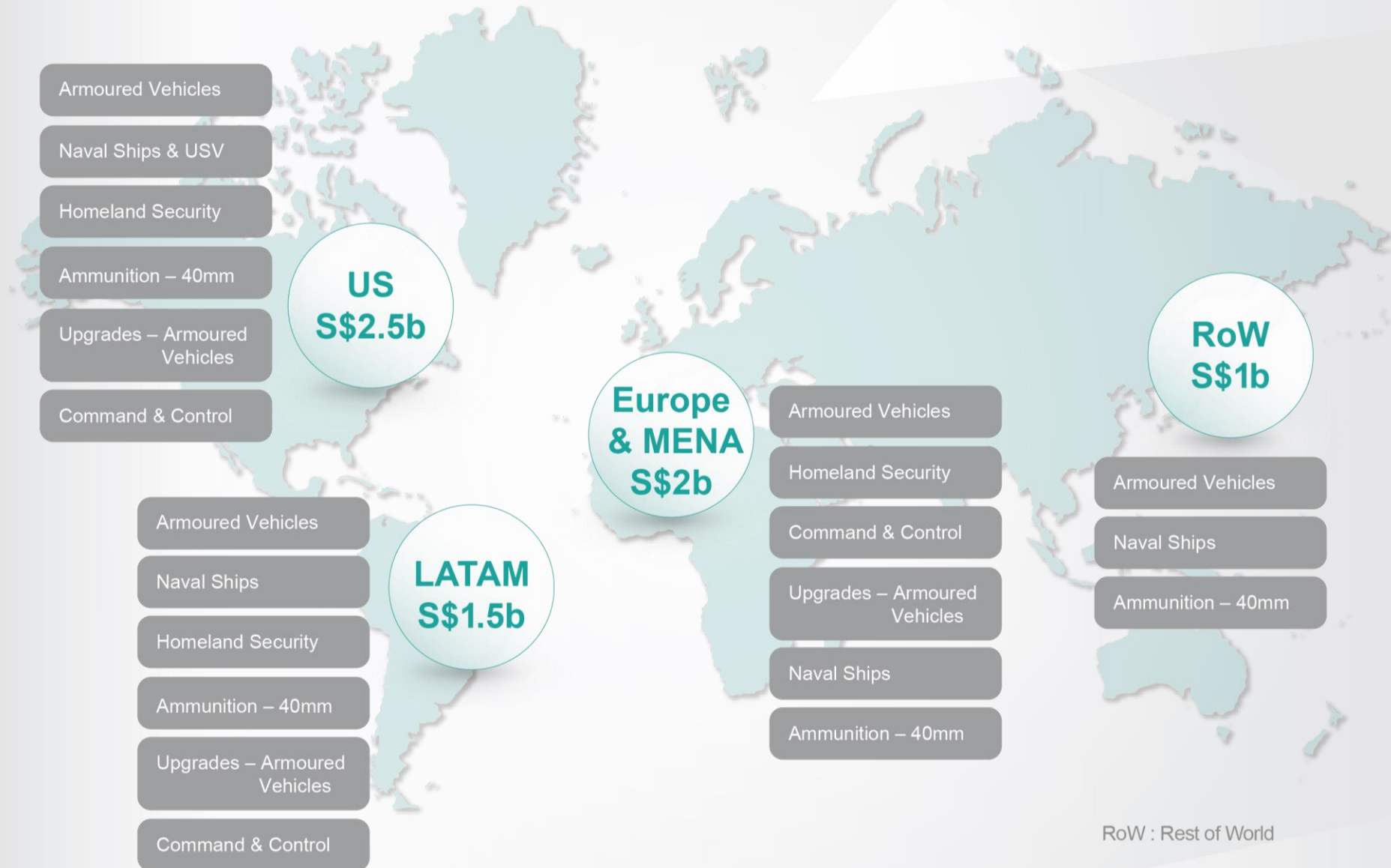


Unmanned Surface Vehicle (USV)

**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



# 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



# 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

 **ST Engineering**

 **ST Engineering**  
Aerospace

 **ST Engineering**  
Land Systems

 **ST Engineering**  
Electronics

 **ST Engineering**  
Marine

**Brand  
Harmonisation**

### Masterbrand

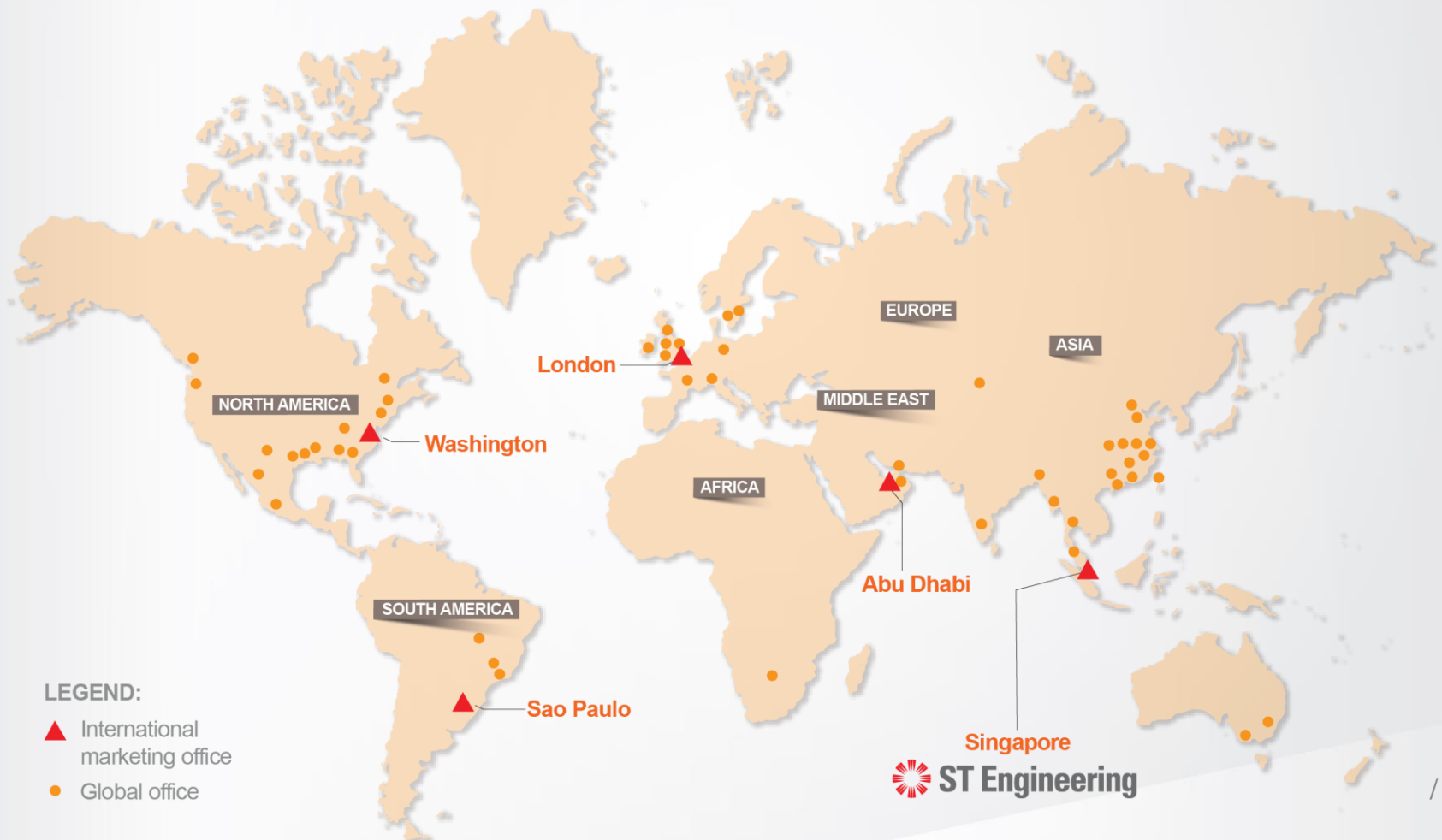
Allows for more effective communication with customers and business partners



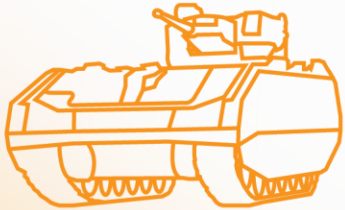
**One Masterbrand + 4 Sector Descriptors**

# Presence in 22 Countries and 44 Cities ST Engineering

Building a stronger network of international marketing offices



# 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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