

# VERTEX VENTURES

Vertex Ventures Annual  
Meeting & Conference  
17th October 2018

SKETCHPOST

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## CONSUMER

- ECOMMERCE
- SOCIAL
- TRAVEL
- ENTERTAINMENT

## SME ENABLEMENT

- B2B
- O2O
- MARKETING TECH
- OPS DIGITIZATION

## ENTERPRISE

- AI / BIG DATA
- CYBER SECURITY
- IOT
- BLOCKCHAIN

MR. BEN MATHIAS  
INDIA

# SEA & INDIA

CONSUMER  
INTERNET  
PENETRATION  
IS GROWING!

LOWER COST  
OF MOBILE  
PHONES &  
DATA!

INDIA:  
- HIGHEST NUMBER  
OF ASIAN UNICORNS  
AFTER CHINA

SMEs  
NEED TO BE  
UPGRADED  
TO THE DIGITAL  
ECONOMY

CONSUMERS  
LOOKING FOR  
FINANCIAL  
EMPOWERMENT






# 30

vertex  
VENTURES  
HERE FOR  
TOMORROW

## BUILDING AN INNOVATION DRIVEN ECONOMY




**MR. LIM TUANG LIANG**  
NATIONAL RESEARCH FOUNDATION

### 4 WAVES OF CHANGE

- 1 EXPORT-LED INDUSTRIALISATION
- 2 HIGH TECH INDUSTRY
- 3 BIOMEDICAL SCIENCES A+STAR
- 4 FUTURE ECONOMY CFE REPORT

**ENTERPRISES SHOULD NOT ONLY ADOPT BUT DEVELOP TECHNOLOGIES.**

- DEEP-TECH STARTUPS
- REGULATORY SANDBOXES
- ADVANCED MANUFACTURING 3D-PRINTING OF AIRCRAFT COMPONENTS
- DIGITAL TRANSFORMATION



**MR. HENG SWEE KEAT**  
MINISTER OF FINANCE

**POST CRISIS**

**CYCLICAL FACTOR**  
ULTRA-ACCOMMODATING INTEREST RATES %

**DEMOGRAPHIC**  
RISE OF EMERGING ECONOMIES

**MONETARY & FISCAL POLICIES CAN STABILISE ECONOMY**

**ASIA FASTEST GROWING ECONOMY**

**TECH**  
WILL PLAY A BIG ROLE IN FUTURE DEVELOPMENT

**RISING MIDDLE CLASS**

**TRADE TENSION IS A NEGATIVE RESPONSE TO A PROBLEM.**  
SOME COUNTRIES ARE OPTING FOR DE-GLOBALISATION.

**UNDP** MULTI LATERAL DISCUSSIONS

**16 COUNTRY TRADE AGREEMENT**

**ASEAN DEEPENING RULE-BASED MULTI LATERAL SYSTEM**

**SINGAPORE'S ROLE IN ASIA**

**TALENT**

FLOW OF TALENT IN & OUT OF SG.

FOCUS ON STEM SUBJECTS % + + X

GLOBAL ASIAN NODE

**REDESIGN JOBS & UPSKILL PEOPLE**

**STRUCTURAL**  
R&D EFFORTS → POTENTIAL NEW DEVP.S → HOW TO TRAIN OUR PEOPLE WELL

**GOV NEEDS TO CREATE A SUPPORT NETWORK FOR**  
GROUND UP INITIATIVES

**ENTREPRENEURSHIP**

**GOOD REGULATION CAN LEAD TO GOOD DEVELOPMENT.**



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## GLOBAL ECONOMY & TECH

MAJOR TRADE DISRUPTION  
TROUBLED EMs  
HARD BREXIT 2019

**IMPORTANCE OF RISKS**  
DEPEND ON  
PROBABILITY  
& IMPACT



**MR. BART VAN ARK**  
THE CONFERENCE BOARD

### SHORT-TERM TRENDS

TRADE DISPUTES NOT YET VISIBLE  
GLOBAL ECONOMY STAYS STRONG

**TRADE TARIFF**  
IMPACT (MACRO LEVEL)

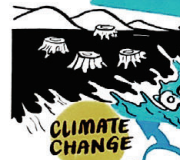
US ECONOMY EXPANSION WILL PEAK  
EXPANSION IN EUROPE IS MODERATING

WE ARE MOVING FROM TOLLATION → DEPLOYMENT



USMCA  
IP & TECH

"TECH COLD WAR"



CLIMATE CHANGE

### MEDIUM-TERM TRENDS

LABOUR MARKETS TIGHTENING  
EM EMERGING MARKETS UNDER STRAIN

MONETARY POLICY LIKELY TO TIGHTEN

DEMOGRAPHICS

COUNTRIES WITH AN AGEING POPULATION

WILL I STILL HAVE A JOB?

FOREIGN LABOUR

HELLO



### CHALLENGES OF THE NEW DIGITAL ECONOMY

PRODUCTIVITY - IMPACTS ARE SMALL  
LABOUR MARKET → PEOPLE REQUIRE TIME TO UPSKILL

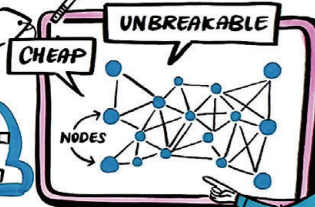
COMPETITIVENESS  
DIGITAL TRANSFORMATION  
POLICY CHANGES

## BLOCKCHAIN & THE ADVENT OF THE INTERNET OF VALUE



**MR. JULIO FAURE**

BLOCKCHAIN DOES TO...  
**VALUE**  
WHAT INTERNET DID TO...  
COMMUNICATION



CHEAP

UNBREAKABLE

MORE EASE IN FINANCING

CREATING NATIVE DIGITAL ASSETS:  
DIGITAL CORPORATE BOND



BITCOIN  
ETHERUM

TOKENIZATION (money)

BLOCKCHAIN PROVIDES A SUPER-COMPUTER FOR EVERYONE TO USE.

RECHARGING ELECTRIC CAR VIA 'SMART CONTRACTS'/ DECENTRALISED LEDGER

DAY-TO-DAY



INTERNATIONAL PAYMENTS & LIQUIDITY

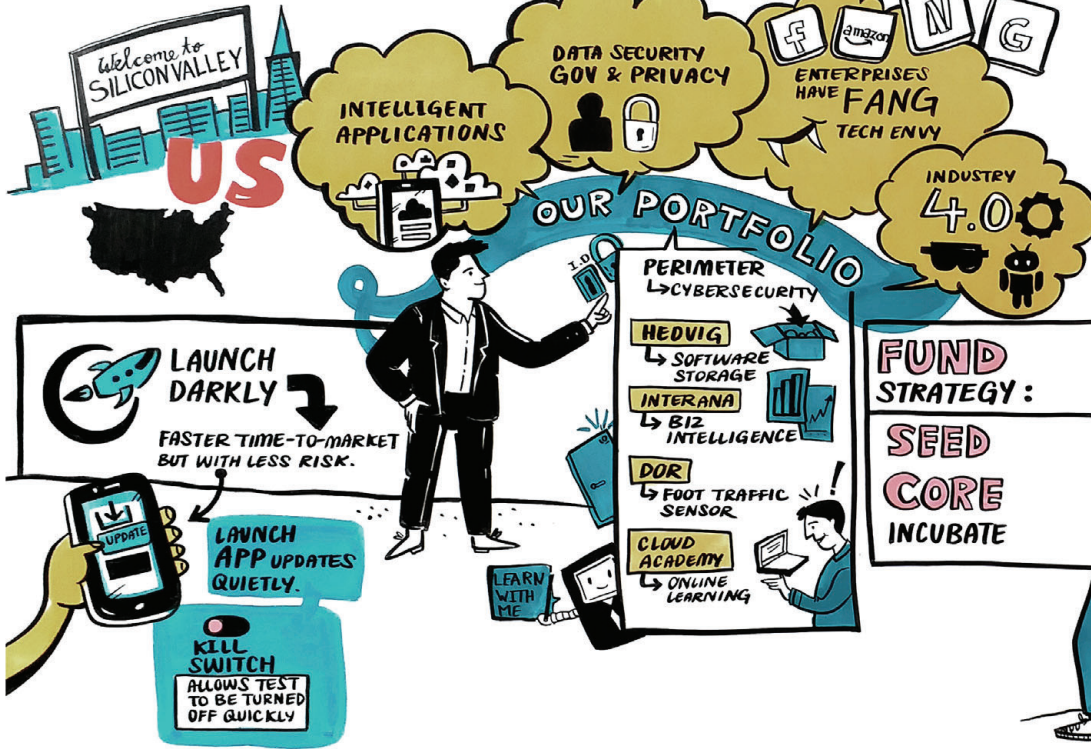
MARKET MAKER (TREASURY)

NETWORK WITH GOVERNANCE

OWNERSHIP



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## PARTNERSHIP

**RELATIONSHIP BUILDING**

**CAPABILITY** DEVELOP & SHARE THOUGHT-LEADING CONTENT.

**CONTENT** EVENTS & PUBLICATIONS

**CONNECTIONS**

- EXPERT SERVICES / NETWORKS
- PROMOTE GPs/VCS IN PUBLICATIONS & FORUMS.
- MANAGEMENT & BOARD EXCHANGES
- NETWORK FUND VISITS.

**Communications**

SOCIAL MEDIA WRITTEN CONTENT VIDEO PR

**VERTEX EDGE 2.0**  
INFO ON-THE-GO!

**DYNAMIC NEWS UPDATE.**

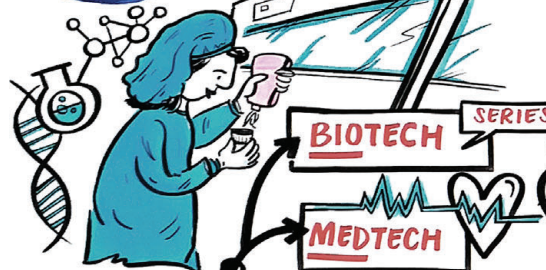
**GROWTH FUND**

INVESTMENT GUIDEPOST

- PRIMARILY NETWORK FUNDS
- COMBINE INTEREST FOR INFLUENCE
- IN-COUNTRY NETWORK FUNDS SHALL HAVE PRIORITY OVER IN-COUNTRY DEALS



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## HEALTHCARE

**VISTERRA**  
PLATFORM TECH

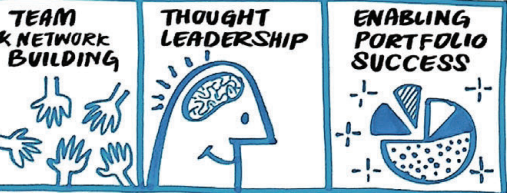
AFTER MANY FAILURES TO GET FUNDING IN THE WEST, WE LOOKED TO THE **EAST** JAPAN & CHINA

KNOW WHEN TO DOUBLE DOWN VS. WHEN TO CUT BACK

UNDERSTAND REALITIES OF MARKET

RESILIENT & RESOURCEFUL TEAM

### MOVING FORWARD



**28/7**

FOUNDER **KAZUMI SHIOSAKI**

"LADY GAGA" OF BIOTECH

DEVP. TUMOUR SUPPRESSOR FOR CANCER

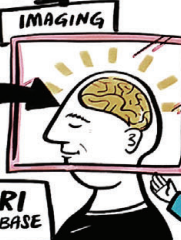
SERIES A & B



**NEUROPSYCHIATRIC**  
HIGHEST CAUSE OF DISABILITY IN U.S.

**BLACKTHORN THERAPEUTICS**

DIGITAL TOOLS & ANALYTICS: LINKING PATIENT PHENOTYPE WITH EFFECTIVE TREATMENT



WE CAN SEE MORE SIGNS OF...



NEW ENTERPRISE SOFTWARE STACK

- AUTOMATION
- DIGITIZATION

### AUTOMATION

**DIGITAL Health**

NUCLEAR

DATOS

**BEYOND CYBER**

WATCHFUL

**RETAIL**

TRIGO

MIGRATION TO CLOUD

SPOTNIST

OWNBACKUP



**\$170 MILLION ISRAEL**

STRATEGY: PORTFOLIO

- SMALL SEED PROGRAMME
- HIGH RATIO OF SEED INVESTMENT

EMERGING MARKETS

- AUTOMOTIVE
- RETAIL
- AG-TECH
- DIGITAL HEALTH INSURANCE





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**13** PORTFOLIOS HAS RAISED OVER **US\$600 MIL**

EXIT: MOBIKE SOLD TO METTUAN WITH **11x** RETURN.

**MR. TEO MING KIAN**  
CHAIRMAN,  
VERTEX

BUILDING AN ENDURING INSTITUTION WITH RESILIENCE

**NETWORK CAPACITY PORTFOLIO**

STRENGTHEN OUR UNIQUE BONDS & PARTNERSHIPS

STARTUP FOUNDERS TRUST US & VALUE OUR INVOLVEMENT.

VERTEX'S SUPPORT HAS HELPED US GROW OUR BIZ!

**MR. BEN MATHIAS**  
INDIA

CONSUMER INTERNET PENETRATION IS GROWING!

LOWER COST OF MOBILE PHONES & DATA!

**SEA & INDIA SMEs** NEED TO BE UPGRADED TO THE DIGITAL ECONOMY

CONSUMERS LOOKING FOR **FINANCIAL EMPOWERMENT**

AWAKENING THE SLEEPING ASIAN GIANT

**INDIA** - HIGHEST NUMBER OF ASIAN UNICORNS AFTER CHINA

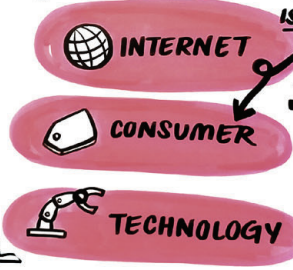
THERE IS HIGH DEMAND FOR ONLINE SHOPPING

EXIT: HIGHHEEL 73 PARTIALLY SOLD TO BELLE FOR **2.5x** RETURN.

**CHINA**

**MR. CHOON CHONG**

CHINA IS A CONSUMPTION MARKET.



PRODUCTIVITY - MOVE FROM MANUFACTURING TO INVENTION.

**iOranges** - CUSTOMISED MACHINERY



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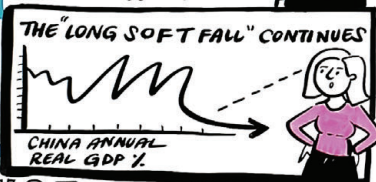


MR. DAVID  
HOFFMAN  
THE CONFERENCE  
BOARD

**CHINA**  
SHIFTING OF ECONOMY  
& GLOBAL AMBITION  
PERSPECTIVE  
FOR BUSINESS

WE'RE JUST  
GETTING  
STARTED

CHINA IS STILL  
AT EARLY STAGE  
OF MOMENTOUS  
ECONOMIC  
TRANSITION



**REFORM**

**HUGE REFORM POTENTIAL**

- HIGHER IP INFRINGEMENT PENALTIES
- CLARIFIED MARKET ACCESS
- COMPETITION POLICY
- SUNSHINE LAW

REQUIRES CHANGE IN CONTROL STATUS

- NATIONAL PLAN
- PROVINCIAL PLAN
- CITY PLAN
- CITY-ZONE PLAN
- COMPANY PLAN



**BELT & ROAD**  
GLOBALISATION  
WITH CHINESE  
CHARACTERISTICS

CHINA'S FINANCIAL  
RESOURCES ARE  
LIMITED.

EXPENSIVE

HOST COUNTRIES  
WON'T ALWAYS  
ACCEPT IT.



STATE  
BIRD-CAGED  
PRIVATE  
SECTOR

INSTEAD OF  
"MARKETS PLAYING  
A DECISIVE ROLE"  
A NEW POLITICAL  
ECONOMY PLAYBOOK

BIGGER, STRONGER  
STATE-CONTROLLED  
SECTOR

CHINA'S  
**DIGITAL**  
ENVIRONMENT  
IS *unique*

MONEY FEEDING  
FRENZY!!

- CAPITAL  
MARKETS  
INVEST IN  
DATA ACQUISITION.

HYPE	THE REAL	POTENTIALLY TRANSFORMATIVE
SHARING SERVICE E-COMMERCE	FINTECH BIG DATA ANALYTICS	SOFT A.I. AGRICULTURE



# HELLO

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