1. Select “Chat” function

2. Select “Host & Presenter”

3. Type your question here

3. Press ‘Send’
Jungle Ventures – Two Investment Platforms

**SEEDPLUS**

**Seed**

$30m AUM; invests $250K-$1m into highly innovative startups building global technology businesses

**Key Themes:** IoT, Artificial Intelligence, Blockchain, Security, Financial Services

**jungle ventures**

**Series A/B**

US$110m AUM; typically invests $1-5m into regional category leaders across India, SEA and Australia/NZ

**Key Themes:** Software, Vertical eCommerce, Marketplaces, Financial Services
Jungle Ventures Group Portfolio

India
- Livspace
- Wydr
- Moglix
- PaySense
- Snapbizz
- Shopclues
- Vayana

Thailand
- Pomelo.

Malaysia
- iMoney.my
- iFlix

Indonesia
- Kredivo
- RedDoorz

Singapore
- tradegecko
- POKKT
- Evie
- smartkarma
- Crayon
- Mobikon
- fastacash
- appknox
- Vault Dragon
- Tookitki
- Cove

USA
- ABRA
- AIPARC
- Qopper

Australia
- Edrolo
- Spaceship

34 Active Companies

5 Exits
South East Asia Today
A Big Attractive Market With Strong Macro Tailwinds

US$2 trillion GDP
~600 million People
Young Population
Growing Middle Class
Increasing Urbanization
100% Mobile Penetration
Growing Consumerism

Urban infrastructure is modern and efficient, but rural networks are sub-standard
...but it is still emerging online

Internet penetration around 41%

Smartphone penetration around 50%

Online ad spend around 14%

E-commerce less than 2% of total retail

Digital experiences are predominately mobile first and more often mobile-only
Some of the largest & fastest growing economies

Nominal GDP and Real GDP Growth Rate
(US$ Billions, %)

Source: CitiBank and EIU

- Indonesia: 4.9% GDP Growth, 862 GDP, 21,532 2020 est
- Thailand: 2.9% GDP Growth, 425 GDP, 18,037 2020 est
- Malaysia: 4.3% GDP Growth, 381 GDP
- Singapore: 1.9% GDP Growth, 321 GDP
- Philippines: 6.1% GDP Growth, 382 GDP
- Vietnam: 6.4% GDP Growth, 244 GDP

Source: CitiBank and EIU
The fastest growing internet market in the world

Projected to reach half a billion internet users by 2020; +3.8m new online users monthly

Source: Google-Temasek e-conomy SEA report
Consumption online is growing exponentially

Online market expected to grow >6x to ~US$200bn by 2025

---

**Source:** Google-Temasek e-conomy SEA report
First market for the global leaders to go head to head
...reliance on cash creates friction for online purchases

Over Half the SEA Population is Completely Unbanked
(% of Adult Population 2014)

SEA¹

72% Unbanked
69% Bank Account
64% Unbanked
22% Bank Account
19% Unbanked
4% Bank Account
58% Unbanked

Negligible Credit Card Penetration Outside Singapore and Malaysia
2014 Penetration (%)

SEA¹

30% Credit Card
15% No Credit Card
5% Credit Card
2% No Credit Card
2% Credit Card
1% No Credit Card
3% Credit Card

Source: Citibank Data

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However, despite headline numbers, general global perception remains that SEA is...

| Highly fragmented market         |
| Collection of dissimilar “emerging” countries |
| Under developed tech and venture ecosystem |
| Not big enough to support large exit/ IPO outcomes |
Yet customers in SEA metros demonstrate more homogenous consumer behaviour – brands, apps, etc

<table>
<thead>
<tr>
<th>Online media and apps</th>
<th>Aspirational brands</th>
<th>Digital product and services</th>
<th>Spending power (as represented by GDP per capita)</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube, WhatsApp, Instagram, Twitter, Facebook, Line</td>
<td>Starbucks, Zara, H&amp;M, Nike, UNIQLO</td>
<td>Apple, Spotify, Google Play, Carousell</td>
<td>KL: $21,750</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Bangkok: $12,251</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Jakarta: $7,207</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ho Chi Minh: $5,100</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Manila: $4,763</td>
</tr>
</tbody>
</table>

PRIVATE AND CONFIDENTIAL - NOT FOR DISTRIBUTION
Addressable market ($) in top 6 SEA major metros is bigger than top 6 major metros in India

<table>
<thead>
<tr>
<th>Top 6 Indian cities</th>
<th>Metro area</th>
<th>Population (2014 Est.)</th>
<th>GDP/capita 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delhi</td>
<td>23</td>
<td>$3,580</td>
<td></td>
</tr>
<tr>
<td>Mumbai</td>
<td>22</td>
<td>$1,990</td>
<td></td>
</tr>
<tr>
<td>Kolkata</td>
<td>16</td>
<td>$1,116</td>
<td></td>
</tr>
<tr>
<td>Chennai</td>
<td>10</td>
<td>$1,870</td>
<td></td>
</tr>
<tr>
<td>Bangalore</td>
<td>8</td>
<td>$1,420</td>
<td></td>
</tr>
<tr>
<td>Hyderabad</td>
<td>6</td>
<td>$1,430</td>
<td></td>
</tr>
<tr>
<td>India Total</td>
<td>85 million</td>
<td>$2,148 w/ave</td>
<td></td>
</tr>
</tbody>
</table>

$182B Total

<table>
<thead>
<tr>
<th>Top SEA cities</th>
<th>Metro area</th>
<th>Population (2014 Est.)</th>
<th>GDP/capita 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manila</td>
<td>13</td>
<td>$4,763</td>
<td></td>
</tr>
<tr>
<td>Jakarta</td>
<td>32</td>
<td>$7,207</td>
<td></td>
</tr>
<tr>
<td>Bangkok</td>
<td>16</td>
<td>$12,251</td>
<td></td>
</tr>
<tr>
<td>Kuala Lumpur</td>
<td>6</td>
<td>$21,750</td>
<td></td>
</tr>
<tr>
<td>HCMC</td>
<td>8</td>
<td>$5,100</td>
<td></td>
</tr>
<tr>
<td>SEA Total</td>
<td>75 million</td>
<td>$8,798 w/ave</td>
<td></td>
</tr>
<tr>
<td>Singapore</td>
<td>6</td>
<td>$51,000</td>
<td></td>
</tr>
<tr>
<td>SEA with SG</td>
<td>81 million</td>
<td>$11,924 w/ave</td>
<td></td>
</tr>
</tbody>
</table>

$965B Total

GDP/capita is 4x higher across the top SE Asian cities
(5.2x including Singapore)

Note: GDP per capita numbers are specifically for the city areas.
Source: Brookings Institution; Worldbank; Wearesocial – 2017 Digital in Asia : SouthEast Asia; Wikipedia; NESDB Thailand; National Statistical Coordination Board Philippines; Statistics Office of Vietnam

PRIVATE AND CONFIDENTIAL - NOT FOR DISTRIBUTION
SE Asia Venture Capital Ecosystem
Capital stack is filling out at all stages
Mega funding rounds continue in 2017 and will increase the awareness of the region with global investors.

Over $5 Billion has been invested in late stage venture in Jan-Aug 2017 validating the potential scale of the region.

- **3 May 2017**
  - $1.2B ($1.75B to date)
  - Indonesia’s Uber rival Go-Jek raises $1.2 billion led by Tencent at a $3 billion valuation

- **23 July 2017**
  - $2B ($3.44B to date)
  - Grab gets $2B from Didi and SoftBank to fuel bid to defeat Uber in Southeast Asia

- **28 July 2017**
  - $350M ($500M to date)
  - Expedia invests $350M in Traveloka to create Southeast Asia’s newest unicorn

- **7 August 2017**
  - $133M ($300M to date)
  - Iflix raises $133M for its Netflix-style service for emerging markets with investors like News, Liberty Media & Hearst

- **18 August**
  - $1B ($1.75B to date)
  - Alibaba leads $1.1B investment in Indonesia-based e-commerce firm Tokopedia

- **18 August 2017**
  - $1.2B ($1.35B to date)
  - Indonesia’s Uber rival Go-Jek raises $1.2 billion led by Tencent at a $3 billion valuation

- **23 July 2017**
  - $2B ($3.44B to date)
  - Grab gets $2B from Didi and SoftBank to fuel bid to defeat Uber in Southeast Asia

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- **18 August**
  - $1B ($1.75B to date)
  - Alibaba leads $1.1B investment in Indonesia-based e-commerce firm Tokopedia
Stage of company for VC invested rounds by quarter

• About US$2.6B was invested in 2016 by VC firms
  • About $820M if you exclude the mega funding rounds

• Seed rounds comprise >50% of all capital invested
  • Seed + Series A is about 75%

• In Q1 17, there was an encouraging uptick in Series B funding

• Activity at the Seed stage results in a strong pipeline
Majority of capital is no longer dominated by Singapore

- Singapore is no longer the dominant market for where the capital is going
- Indonesia (Go-Jek, Tokopedia, Traveloka) and Malaysia (Grab & iFlix) companies are attracting large capital flows
Number of deals are more evenly distributed

Number of Seed to Series C Investments
By Country (# of Deals)

- However, Singapore is still the main market for venture backed companies with roughly half from Seed to Series C

- Indonesia has now developed its own venture ecosystem over the last 2+ years
Liquidity gaining significant momentum via notable strategic acquisitions, acqui-hires and upcoming IPOs

<table>
<thead>
<tr>
<th>2016</th>
<th>2015</th>
<th>2014</th>
<th>Pre-2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alibaba Group</td>
<td>Grab</td>
<td>LVMH</td>
<td>seek asia</td>
</tr>
<tr>
<td>$3.2B</td>
<td>$100M</td>
<td>Undisclosed</td>
<td>$586M</td>
</tr>
<tr>
<td>Lazada Effortless Shopping</td>
<td>Kudo</td>
<td>Luxola</td>
<td>JobStreet.com</td>
</tr>
<tr>
<td>$1st acqui-hire in SEA</td>
<td>1st Nasdaq IPO in SEA</td>
<td>$30M</td>
<td>$200M</td>
</tr>
<tr>
<td>$1st Nasdaq IPO in SEA</td>
<td>Zendesk</td>
<td>Zopim</td>
<td>Rakuten</td>
</tr>
<tr>
<td>$30M</td>
<td>$90M</td>
<td>$200M</td>
<td>$200M</td>
</tr>
</tbody>
</table>

With projected number of M&A deals per year in SEA to reach ~250 by 2020

Source: Pitchbook, State of SEA Technology Startup Ecosystem 2016, Crunchbase, Map of the Money 4.0, GGV – SEA Offers Big Exits
EduTech Market in SE Asia
**Macro trends will drive a robust ecosystem over time**

Limited offline resources should accelerate online education offerings

- In Vietnam, there are more than 100 edtech startups and over 2 million people have enrolled in different paid online learning programmes

Increasing number of jobs require knowledge and skills that don’t exist in the workforce today

Education and healthcare tend to receive a disproportionate share of disposable income

Mobile accessibility and emerging payment solutions will create more accessibility to the mass market

*Education services tend to cater either for emerging or mature market audiences*
Tracxn Data on EduTech Sector in SE Asia

Over 700 companies in SE Asia
About 50 are venture backed
Est $18m invested YTD

Active investors include:
- 500 Start-ups
- CyberAgent
- East Ventures
Thank you.
Education in Our Changing Learning World!

Dr Samson Tan
National Institute of Education,
Nanyang Technological University
Talk Overview

1. New Roles of the Instructor
3. Future Trends and Ideas
Learning is Changing...
1. Instructor as Facilitator
2. Instructor as learning Architect
3. Instructor as Shaper/Sculptor
4. Instructor as Conductor
5. Instructor as Curator
6. Instructor as Concierge
7. Instructor as Camping Trip Guide
The Fourth Industrial Revolution

Klaus Schwab, Founder and Executive Chairman, World Economic Forum

https://www.weforum.org/agenda/2016/01/the-fourth-industrial-revolution-what-it-means-and-how-to-respond/
Learning is Changing: The Mega Trends

- Learner engagement
- Pervasive Access
- Personalisation
How Learning is Changing: 
Mega Trend #1. Learner Engagement

- social
- immersive
- experiential
- mobile
- digital & resource rich
- collaborative
How Learning is Changing:
Mega Trend #2. Pervasive Access

informal
global
online
ubiquitous
video-based
synchronous
How Learning is Changing:
Mega Trend #3. Personalisation

- personal
- massive
- blended
- communal
- self-directed
- on-demand
WHAT'S NEXT
Artificial Intelligence & Robot Collaborators/Partners

E-Mentoring
Learning Designer as Learning Architect

The New and Improved Instructional Designer

- writer
- problem solver
- innovator
- facilitator
- researcher
- project manager
- developer
- media expert
- editor

10 Super Powers of the World's Greatest Instructional Designer

1. Passion for Learning
2. Deep Understanding of How People Learn
3. Strong Visualization Skills
4. Ability to Write Well
5. Creative and Analytical Problem-Solving Skills
6. Organizational Skills
7. Active Listening Skills
8. Technology-Based Skills
9. Innovation and Creativity
10. People Skills

SHIFT Disruptive Learning
Personalization of Learning
Keep Calm
the presentation is over
Any Questions?
PREPARING TODAY’S STUDENTS FOR TOMORROW’S WORKPLACE

www.edutech.asia
8-10 November

Produced by
ABOUT EDUTECH ASIA

“EduTECH Asia is an unrivalled opportunity to keep up to date with regional and world-class innovative education trends.”

Dr. David Santandreu Colonge
Manager, Educational Design and Development
The University of Adelaide

“I love being involved with like-minded educators and have the ability to connect, engage and learn from and with the best at EduTECH Asia”

Craig Kemp
Head of Educational Technology (K-12)
Stamford American School

“I’ve been getting ready for EduTECH Asia for months! I hope to share with, inspire, and learn from a community of educators who share my understanding that all effective teaching is, at heart, relational.”

Christopher Carter
Teacher, Tech Coach, EdTech Reviewer and Editor
Concordia International School Shanghai

“It’s an invaluable opportunity to network with other educators from around the region and the world.”

Mark Pogrum
Associate Professor
The University of Western Australia
EVENT AT A GLANCE

380+ SPEAKERS, 3000+ ATTENDEES FROM ACROSS APAC, 100+ EXHIBITORS

Exhibition
100+ best-in-class vendors ready to share their wares

Robotics Pavilion
A dedicated zone featuring the latest in robotics technology for the education sector

Educators / teachers
8 tracks, 385 speakers, extensive opportunities to learn

Hands on workshops
In-depth opportunities to pick up practical skills

Makerspace
Get hands on with maker tools and discover the educational value

School tour
See for yourself – a chance to check out how tech is really being used

#teachtechtalks
Case studies presented by educators for educators

Tech showcase
The very best solutions and services demonstrated by our sponsors & exhibitors

Networking opportunities
From the meetings mobile application to private luncheons

Evening drinks reception
Kick back, relax and network with other delegates, speakers and sponsors
WHAT’S NEW THIS YEAR

9 THEATRES OF CONTENT

K-12 LEADERS  TERTIARY LEADERS  IT LEADERS

SPECIAL NEEDS  EDUCATION POLICY  EARLY CHILDHOOD

VOCATIONAL  BUSINESS  #TEACHTECHTALKS

COMPLETE YOUR EDUTECH EXPERIENCE WITH

SCHOOL TOURS - 7 NOV  EDUTECH AWARDS  WORKSHOPS - 10 NOV
GET INVOLVED

- SPEAK
- EXHIBIT
- SPONSOR
- ATTEND
- START-UPS
<table>
<thead>
<tr>
<th>BENEFITS</th>
<th>TITLE</th>
<th>DIAMOND</th>
<th>PLATINUM</th>
<th>GOLD</th>
<th>SILVER</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPPORTUNITIES AVAILABLE</td>
<td>1</td>
<td>2</td>
<td>5</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td>CHAIRMAN ROLE</td>
<td>DAY 1 MORNING PLENARY</td>
<td>TRACK</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KEYNOTE PRESENTATION</td>
<td>20 MINS DAY 1 MORNING</td>
<td>20 MINS DAY 1 EVENING / DAY 2 MORNING</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRACK PRESENTATION</td>
<td>2</td>
<td>1</td>
<td>1 DAY 1 AM</td>
<td>1 DAY 1 PM</td>
<td></td>
</tr>
<tr>
<td>2 HOUR WORKSHOP</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PANEL SESSION</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROUNDTABLE / EDUSLAM MODERATOR</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>FACILITATED MEETINGS</td>
<td>15</td>
<td>10</td>
<td>5</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>ONFLOOR SEMINAR PRESENTATION</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>CONFERENCE PASS (FOR STAFF)</td>
<td>15</td>
<td>10</td>
<td>8</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>CONFERENCE PASS (FOR CLIENTS)</td>
<td>20</td>
<td>10</td>
<td>8</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>LOGO ON WEBSITE &amp; PROMOTION</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>EXHIBITION BOOTH</td>
<td>72 SQM RAW SPACE</td>
<td>72 SQM RAW SPACE</td>
<td>60 SQM RAW SPACE</td>
<td>36 SQM RAW SPACE</td>
<td>18 SQM SHELL</td>
</tr>
</tbody>
</table>
SPONSORS ON BOARD

TITLE SPONSORS

GOLD SPONSORS

SILVER SPONSORS
EXHIBIT

Booth prices start from SGD650/sqm onwards.

For sponsorship and exhibition opportunities, please contact Geraldine Chen at +65 6322 2716 or geraldine.chen@terrapinn.com
WHO ATTENDS

INSTITUTIONS
WHO ATTENDS

INSTITUTIONS

and more...
CONTACTS

Speaking: Preeti Varadarajan
preeti.varadarajan@terrapinn.com

Sponsorship & Exhibition: Geraldine Chen
geraldine.chen@terrapinn.com

Attend: Kalyani Lakshmanan
Kalyani.Lakshmanan@terrapinn.com
THANK YOU
HOW TO ASK QUESTIONS

1. Select “Chat” function

2. Select “Host & Presenter”

3. Type your question here

3. Press ‘Send’
Thank you