change + diversification 郄

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Progress is

Johan Buse Chief, Consumer

STARHUB INVESTOR DAY 2020 CBG Re-Invent Strategy

18 November 2020

FORWARD-LOOKING STATEMENTS



The following presentation may contain forward-looking statements by StarHub Ltd ("StarHub") relating to financial trends for future periods.

Some of the statements in this presentation which are not historical facts are statements of future expectations with respect to the financial conditions, results of operations and businesses, and related plans and objectives. These forward-looking statements are based on StarHub's current views, intentions, plans, expectations, assumptions and beliefs about future events and are subject to risks, uncertainties and other factors, many of which are outside StarHub's control. Important factors that could cause actual results to differ materially from the expectations expressed or implied in the forward-looking statements include known and unknown risks and uncertainties. Because actual results could differ materially from StarHub's current views, intentions, plans, expectations, assumptions and beliefs about the future, such forward-looking statements are not and should not be construed as a representation, forecast or projection of future performance of StarHub. It should be noted that the actual performance of StarHub may vary significantly from such statements.

CBG ECOSYSTEM

Connectivity, Customer Satisfaction, Branding, Product Simplification, Digital Journey as Core



StarHub Brand: #BeTheChange



Mobile Transformation

Home Transformation

Channel & Service Transformation: Digitalisation

Customer centric mindset

Cost-effective execution

Simplified systems & processes

KEY STRATEGIES Driving Revenue Growth & Streamlining Costs

touchpoints

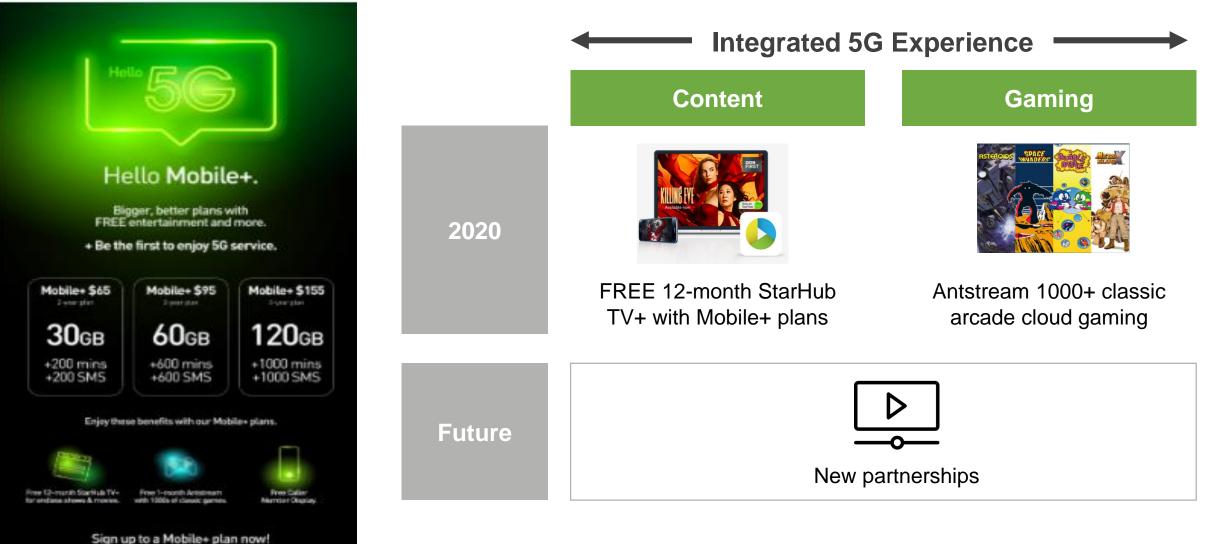


DIFFERENTIATE **CHALLENGE DIGITAL FIRST** Achievement: SIMPLIFY **Digital Rewards** Homehub Plus Achievement: • **Refreshed** retail First to launch 5G & cloud • experience (Plaza gaming Achievement: Singapura flagship store) Fastest Network (IMDA, Giga! 2019) 3rd party content/OTT Achievement: Next steps: partnership Mobile: Hello Change 5G new possibilities & Next steps: StarHub TV+ opportunities Review operating model Next steps: for enhanced cost Grow Giga! market share Next steps: efficiencies Garner more 3rd party Mobile Transformation content partnerships Pay TV Transformation . Enhance & increase • adoption of digital

5G ON SINGAPORE FASTEST NETWORK

Network differentiation with content and gaming partnerships





5

PAY TV TRANSFORMATION





Why choose when you can have it all?



EXPERIENCE

- Simplified products (IPTV + OTT) with unified pricing
- Unified experience across big and small screens
- Plug-and-play

COST STRUCTURE

- Completed cable-to-fibre migration; transformed to variable cost model
- Converted most content providers to variable fee model

THE FUTURE OF BROADBAND

Carving A Niche – Gaming

- Performance Differentiation
- Lower ping times; reduced latency

New Technologies

- 5G Fixed Wireless Access & WiFi6
- Enhanced experience
- Plug-and-play; no installation lead time



Mesh Solutions

- Plug-and-play; easy installation via mobile app
- Enhanced WiFi coverage

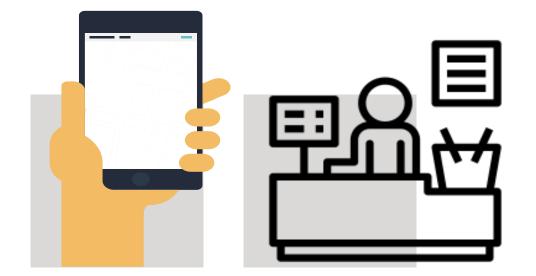
RE-IMAGINE CHANNEL DISTRIBUTION

Differentiated customer experience & cost effective operating model



ONLINE

- Core sales channel
- Simplified one click journey



RETAIL DNA

- Experiential retail
- Effective footprint across Singapore

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