

# Grab Corporate Profile

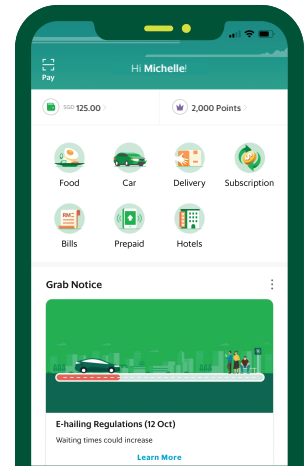
Grab is Southeast Asia's leading super app that provides everyday services such as ride-hailing, food, package, grocery delivery, mobile payments and financial services to millions of Southeast Asians. In the 12-month period to March 2019, Grab contributed US\$5.8 billion to Southeast Asia's economy.

## Driving Southeast Asia Forward

- Grab aims to use technology to empower its communities and elevate the quality of life for everyone
- Over **166 Million** mobile downloads
- Over **9 Million** micro-entrepreneurs across our network

**339 Cities\*** **8 Countries**

\*Includes Indonesian cities and regencies, aligning with the government's definition of second-level administrative subdivision under the provinces



Provide the everyday services that matter the most to our users

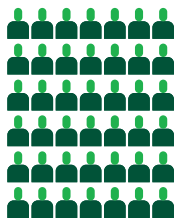
**Services** Grab offers payments and a range of consumer services through one mobile app

Mobility	Fintech	Lifestyle
<p><b>Get a Ride</b></p> <ul style="list-style-type: none"> <li><b>GrabTaxi</b> &gt; E-hailing solves safety and price certainty issues associated with traditional taxis in the region.</li> <li><b>GrabBike</b> &gt; Fastest growing transport service. Most popular option in Greater Jakarta, where population is 60% larger than Beijing.</li> <li><b>GrabCar</b> &gt; Economy and premium options.</li> <li><b>GrabTukTuk / GrabRemorque / GrabThoneBane</b> &gt; Book an affordable ride via our three-wheeler service in the Philippines, Cambodia and Myanmar.</li> <li><b>GrabWheels</b> &gt; A shared active mobility service available in Indonesia.</li> </ul>	<p><b>Get It Faster</b></p> <ul style="list-style-type: none"> <li><b>JustGrab</b> &gt; Automatically assigns a vehicle from both Grab's taxi and car fleets at fixed fares for a faster ride.</li> </ul> <p><b>Share a Ride</b></p> <ul style="list-style-type: none"> <li><b>GrabShare</b> &gt; Commercial on-demand carpooling service for passengers to share their ride.</li> </ul>	<ul style="list-style-type: none"> <li><b>GrabFinancial</b> <ul style="list-style-type: none"> <li>&gt; Micro-lending services to millions of unbanked consumers and micro-entrepreneurs across Southeast Asia.</li> <li>&gt; Micro-insurance products for driver-partners to protect their vehicles and livelihoods.</li> </ul> </li> <li><b>GrabPay</b> <ul style="list-style-type: none"> <li>&gt; The only digital payments provider in SEA with access to e-money licenses in the six major ASEAN economies.</li> <li>&gt; In-app mobile payments for rides, food delivery and more.</li> <li>&gt; QR-code enabled payments with merchants in restaurants and shops.</li> </ul> </li> <li><b>GrabRewards</b> <ul style="list-style-type: none"> <li>&gt; Southeast Asia's largest loyalty programme, with over 700 merchants across the region.</li> <li>&gt; Users can earn points while using Grab's services and redeem discounts through the GrabRewards catalogue.</li> </ul> </li> </ul>
		<ul style="list-style-type: none"> <li><b>GrabExpress</b> &gt; On-demand delivery of parcels in Indonesia, Malaysia, Singapore, the Philippines, Thailand and Vietnam.</li> <li><b>GrabFood</b> &gt; An on-demand food delivery platform available in Indonesia, Thailand, Vietnam, Malaysia, Singapore and Philippines.</li> <li><b>GrabKios</b> &gt; An online platform in Indonesia that connects traditional retailers to sell their products through the app.</li> <li><b>GrabFresh</b> &gt; On-demand grocery delivery service available in Indonesia and Thailand.</li> </ul>

**Market Opportunity** \$38 billion market for transport; \$500 billion market for payments in Asia, \$12.7 billion market for ride hailing in Southeast Asia

### High Population Density and Developing Public Transportation Infrastructure

- > More than 640 million people across the region - larger than EU or North America.
- > 12 megacities across SE Asia (>2 million); 4 cities larger than NYC.



### Ideal for Ridesharing



- > Car ownership ranks among the lowest in world.
- > 70 cars per 1,000 people in SE Asia compared to 103 in China and 574 in the United States.

### Growing Consumer Based and Demand for On-demand Services



- > Smartphone penetration expected to double in the next 5 years in Indonesia, Myanmar and Philippines, already exceeds 100% in Malaysia, Thailand and Singapore.
- > Global non-cash transactions reached a volume of more than \$433 billion in 2016. Transaction volume in emerging Asia has grown by 43.4%, from 2014-2015.

2012	2013	2014	2015	2016
<b>GrabTaxi</b> launched in June 2012	<b>Entered</b> Philippines in July 2013	<b>Entered</b> Singapore and Thailand in Oct 2013	<b>Entered</b> Vietnam in Feb 2014	<b>Entered</b> Indonesia in June 2014
		<b>GrabCar</b> launched in July 2014	<b>GrabBike</b> launched in Nov 2014	<b>GrabExpress</b> launched in July 2015
				<b>GrabHitch</b> launched in Nov 2015
				<b>GrabPay</b> regional launched in Jan 2016
				<b>GrabFood</b> launched in May 2016
				<b>Grab for Business</b> launched in June 2016
				<b>GrabPay Credits</b> launched in Dec 2016
				<b>GrabShare</b> launched in Dec 2016
2017	2018	2019		
<b>GrabCoach</b> launched in Feb 2017	<b>JustGrab</b> launched in Mar 2017	<b>Entered</b> Myanmar in Mar 2017	<b>Kudo</b> acquired to expand GrabPay platform in Apr 2017	<b>GrabNow</b> launched in June 2017
			<b>Grab Rewards</b> launched in Aug 2017	<b>Entered</b> Cambodia in Dec 2017
			<b>Acquisition of Uber's business in SEA</b> in Mar 2018	<b>Grab Ventures</b> launched in June 2018
			<b>GrabFresh</b> launched in Sept 2018	<b>GrabWheels</b> launched in Nov 2018
			<b>Videos</b> launched in Feb 2019	<b>Hotels</b> launched in Apr 2019
			<b>Tickets</b> launched in May 2019	

2019	Investment Rounds
<b>Clean and Fixed</b> launched in Sept 2019	<b>Apr 2014</b> : Vertex Ventures Holdings (Temasek)
<b>GrabForGood programme</b> launched in Sept 2019	<b>May 2014</b> : \$15M (GGV Capital, Qunar)
	<b>Aug 2015</b> : \$350M (China Investment Corporation, Didi Chuxing, Coatue)
	<b>Oct 2014</b> : \$65M (Tiger Global, Hillhouse Capital)
	<b>Sep 2016</b> : \$750M (SoftBank)
	<b>Jul 2017</b> : Up to \$2.5B (Softbank, Didi Chuxing)
	<b>Jul 2018</b> : \$4.8B (Toyota Motor Corp, Oppenheimer Funds, Ping An Capital, Microsoft Corp, Booking Holdings, Hyundai Motor Company, Yamaha Motor Co, Softbank; Vision Fund)

R&D Centres
> Seven R&D centres located in Singapore, Beijing, Seattle, Bangalore, Ho Chi Minh City, Kuala Lumpur, Jakarta

Sources: Company Estimates, Demographia World Urban Area (11th Edition; 2015), Nielsen Asean 2015, Mckinsey Insights China, TNS, a Global Market Research Firm, Google, Temasek and Bain & Company Study 2019, e-Conomy SEA 2019.