



RECENT TRENDS SE ASIA

Madhu Iyer



Who am I?

- Born in India
- High School in Singapore
- Engineering in Sydney, Australia
- Worked as a Data Scientist for over a decade in Menlo Park, CA and Mountain View CA
 - *Worked as a Senior Scientist in the Statistics and Data Sciences practice at a Science and Engineering Consulting Firm (Exponent, Inc., formerly Failure Analysis Associates) started by Stanford Alumni in Menlo Park, CA*
 - *Was one of the founding team members at QuickBooks Financing at Intuit, Mountain View, CA. Led the data team to lend \$300M on the platform*
- Worked in Singapore as a Partner at a PE firm investing and building Fintech companies around SE Asia
- Was the Chief Data Officer at Go-Jek (Indonesian Unicorn Startup) and started their Singapore office
- Moved back home to Menlo Park, CA and act as an advisor to startups here, SE Asia and Europe



Recent trends and outlook for entrepreneurship in SE Asia

- Chinese Investments
- Regional Cross Border Activities

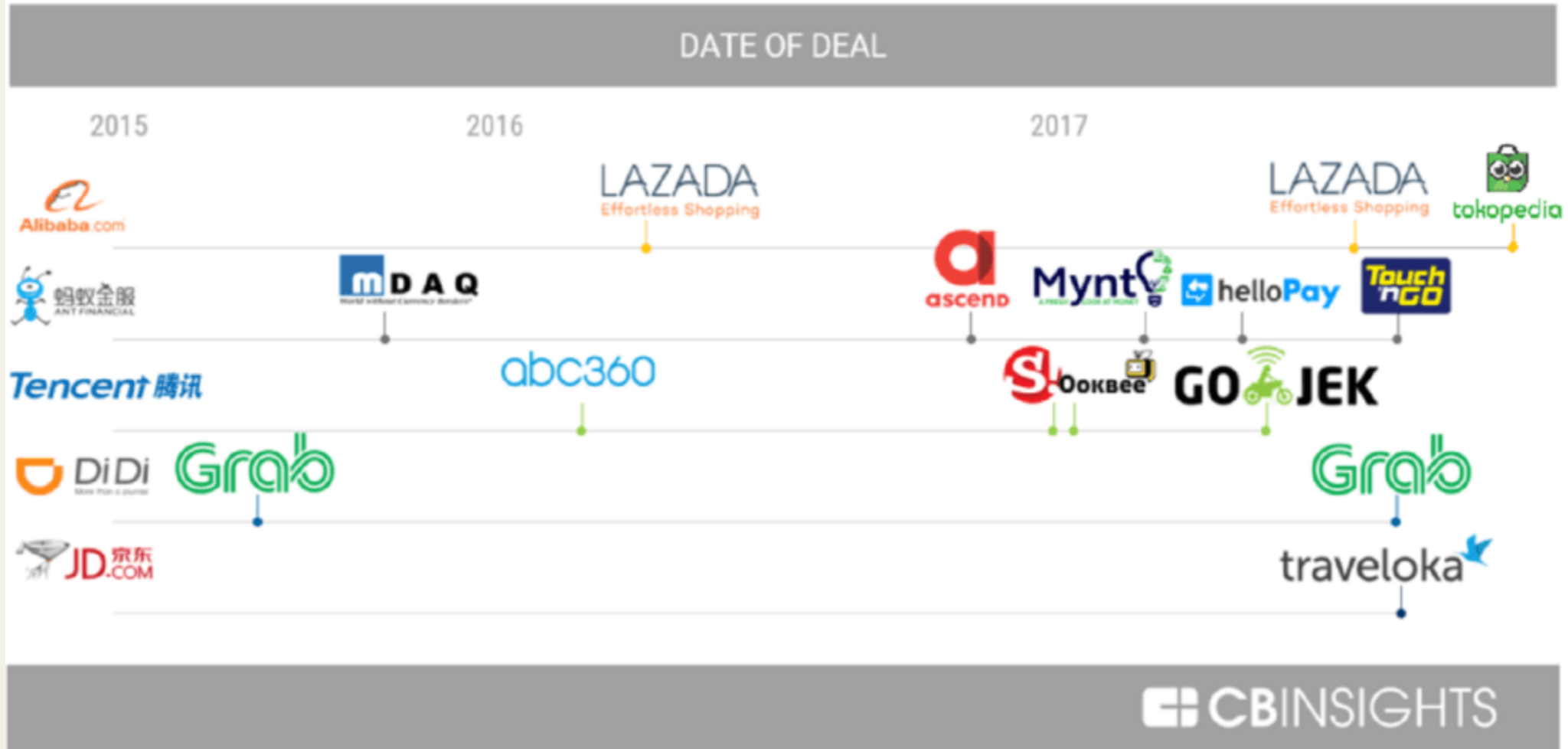


Chinese Investments, Partnerships & M&A's



CHINESE INTERNET GIANTS IN SOUTHEAST ASIA: INVESTMENT AND M&A

2012-2017 YTD (8/24/2017)



CBINSIGHTS

Chinese Investments: Deep Dive Example

GOJEK 50 Cities in Indonesia

Transportation



GO-RIDE



GO-CAR

Courier and Logistic



GO-SEND



GO-BOX

Shopping & Services



GO-FOOD



GO-TIX



GO-MART



GO-MASSAGE



GO-CLEAN



GO-GLAM

GO  **PAY**

Regional Cross Border Activities

- Ecommerce
- Logistics (fulfillments, last mile deliveries, software solutions that enable faster e-logistics)
 - *Single market play, but the market is underdeveloped and UPS/ DHL finding it tough to compete at the very low per package cost)*
- Sharing Economy – Grab, Go-Jek
- Fintech

Cross Border is the only way to go in SEA as no one country has both supply and demand