



TECH GROWTH
VENTURES

US & South East Asia Tech Acceleration

Winston Choe

Managing Partner | Tech Growth Ventures

winston@techgrowthventures.com



TECH GROWTH
VENTURES

A GLOBAL TECH

GROWTH ACCELERATOR

SPUR INVESTMENTS
EMPOWER INNOVATION
ACCELERATE GROWTH



Building US-Asia

Innovation Pipeline

**Energy &
Environment**



**Information &
Communications**



**Electrical &
Electronics**



ASEAN Member Countries



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Myanmar



Laos



Philippines



Thailand



Vietnam



Cambodia



Brunei
Darussalam



Malaysia



Indonesia



Singapore

617m Population

\$2.3T Economy

\$150 FDI/capita

55m Middle-Class

199m Online Users

693m Mobile Users

>72% Social Users

Myanmar



Thailand



Cambodia



Malaysia



Indonesia



Singapore



Philippines



Brunei
Darussalam

Southeast Asian startup opportunity map by country

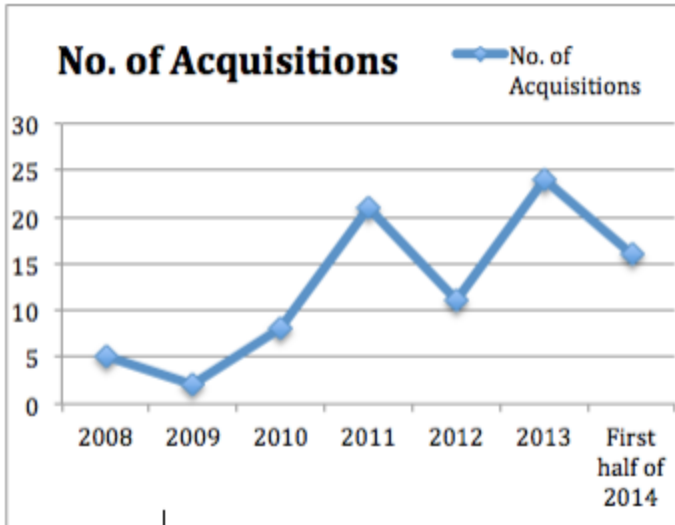


■ Saturated
 ■ Mature
 ■ Semi-mature
 ■ Infancy

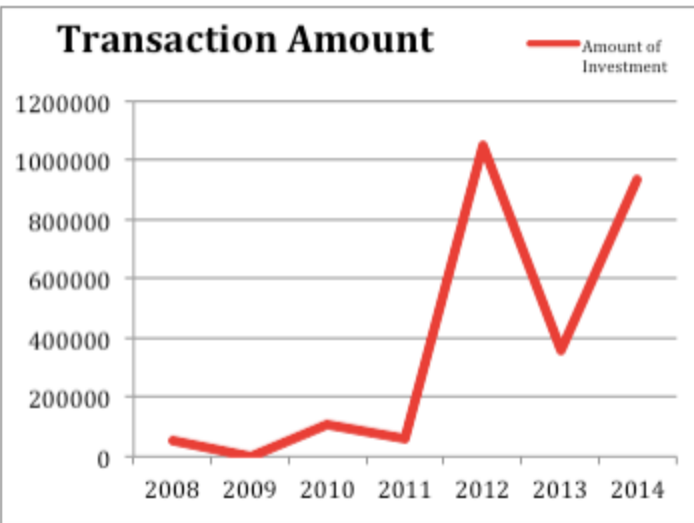
	Philippines	Thailand	Indonesia	Malaysia	Vietnam	SEA
Deals	Metrodeal	Ensogo	Groupon (Disdus)	Groupon	Hotdeal.vn	Groupon
Communications	Facebook/Viber	Facebook/Line	Facebook/Whatsapp	Facebook/Whatsapp	Facebook/Zalo	Facebook/Whatsapp
Search	Google	Google	Google	Google	Google	Google
Listing	Sulit	Dealfish/OLX	Tokopedia	Mudah.my	muaban.net	Craigslist
Blogging	Blogspot	Blogspot	Blogspot	Blogspot	Blogspot	Blogspot
Jobs	Jobstreet	JobsDB	Jobstreet	Jobstreet	Vietnamworks.com	Jobstreet
News	Rappler	Sanook	Detik	Says.com	VNexpress.net	Yahoo/CNA
Community	PinoyExchange	Pantip	Kaskus	lowyat.net	Webtretho	-
Local discovery	Spot.ph	Zodio	Urbanesia	TimeoutKL	Place.vn	-
Music	SoundCloud	4shared	SoundCloud	Spotify	mp3.zing.com	SoundCloud
Gaming	Y8	MOL (Zest Inter.)	Video Games ID	MOL	VNG	MOL
Online retail	Zalora	Zalora	Tokobagus	Lazada	Lazada	Lazada
Dating	Tinder/Pastor	Noonswoon	Setipe	Kehmistry	Badoo	Skout/Badoo
Social discovery	Pinterest	Pinterest	Facebook	Facebook	Pinterest	Facebook
Payment	AsiaPay/DragonPay	2C2P	Klikpay BCA	iPay88	SmartLink	PayPal
Real estate	Sulit/Ayosdito	DDProperty	Rumah123	iProperty	Muaban.net	iProperty
Ticketing	Ticketnet	ThaiTicketMajor	Rajakkarcis	Redtix	Ticketbox.vn	-
Events	Eventbrite	Eventbrite	Eventbrite	Eventbrite	Eventbrite	Eventbrite
Finance	Lenddo	StockRadars	DetikFinance	iMoney	Cafef.vn	Yahoo Finance
Biz networking	LinkedIn	LinkedIn	LinkedIn	LinkedIn	LinkedIn	LinkedIn
Rentals	Ayosdito	Hipflat	Travelmob	iBilik	Airbnb	Travelmob
Dining	Munchpunch	Wongnai	AbraResto	OpenRice	Foody.vn	OpenRice
Travel	TripAdvisor	HotelQuickly	Traveloka	Sota.travel	Chudu24	TripAdvisor/Agoda
Auto	Sulit	Carzeek	Otosia	Carlist	Bonbanh	-
Transportation	Uber/GrabTaxi	Easy Taxi	Bluebird Taxi	GrabTaxi	Vexere	EasyTaxi/GrabTaxi
Education	ActionStack	Eduzones	Zenius	Easyuni	Hocmai.vn	Coursera/Khan Acad
Microwork	Freelancer	Freelancer	Gobann	Freelancer	Freelancerviet.vn	oDesk/Freelancer
Subscription retail	Glamourbox	VanityTrove	Lolabox	VanityTrove	Glamybox	VanityTrove



Growing Tech M&A Exits



Country	Number of Acquirees	Total Disclosed Acquisition Amount
Singapore	32	\$523,550,000
Indonesia	17	\$62,670,000
Malaysia	12	\$531,380,000
Philippines	8	\$9,310,000
Hong Kong	7	\$1,109,500,000
Taiwan	3	\$346,100,000
Thailand	4	Undisclosed
Vietnam	1	Undisclosed



Source: Monk's Hill Ventures

<http://www.monkshill.com/views/2014/8/11/startup-acquisitions-in-asia-southeast-asia>

Growing Tech M&A Exits

Singapore

- **Non-Stop Games**, acquired by CandyCrushSaga maker King (UK)
- **Zopim**, acquired by Zentek (US) for \$30m
- **Viki**, acquired by Rakuten (Japan) for \$200m
- **TenCube**, acquired by McAfee (US)

Indonesia

- **Detik.com**, acquired by Para Group (Indonesia)
- **Maxitech**, acquired by Corous360 (Singapore)
- **PriceArea**, acquired by Yello Mobile (Korea)

Malaysia

- **JobStreet**, acquired by Seek (Australia) for \$523m
- **MOL**, Nasdaq IPO (US) raising \$300m

Thailand

- **Tarad.com**, acquired by Rakuten (Japan)

Source: NUS Entrepreneurship Centre



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Singapore Startup Ecosystem

SINGASCAPE V0.2: AN OVERVIEW OF SINGAPORE'S TECH STARTUP SUPPORT ECOSYSTEM

Government



Venture Capital (Series A & Above)



Venture Capital (Early Stage)



Networking Events



Coworking Space



IHL Groups



Accelerators



Media





Singapore Stars



payment



social networks



e-commerce



e-commerce



entertainment



property



e-commerce



online grocery



tourism



virtual stock market simulation



travel



e-commerce



TGV Engagements



SPRING
singapore



Incubator



Incubator



Mobile Security



Mobile Social Learning



Big Data



Customer Engagement Platform

Red Dot Payment

Payment Solutions Provider



Video Interviewing Platform



Facebook Fan Clubs



Interactive Digital Media



Malaysia Startup Ecosystem



Government



Venture Capital (Series A & Above)



Venture Capital (Early Stage)



Incubators / Accelerators



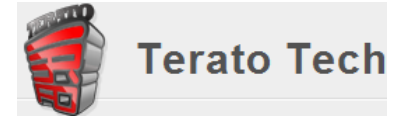


Malaysia Stars

	COMPANY		(MILLION)	(MILLION)	HQ
1	JobStreet Corp Bhd	JOBS:MK	MYR842.00	USD268.20	
2	iProperty Group Ltd	IPP:AU	AUD171.95	USD178.25	
3	My EG Services Bhd	MYEG:MK	MYR474.90	USD151.75	
4	iCar Asia Ltd	ICQ:AU	AUD54.97	USD56.99	
5	Asiatravel.com Holding Ltd	AST:SP	SGD50.62	USD40.46	
6	Innity Corp Bhd	INNC:MK	MYR76.12	USD24.25	
7	Catcha Media Bhd	CHM:MK	MYR43.08	USD13.72	

Table 1: Top 7 publicly listed ASEAN companies (online sector) by market capitalization at 18 March 2013. Source: Catcha Group

TGV Engagements



TGV Engagements



ASEAN Startup Trends

- Rapid regional ecosystem development, led by Singapore
- Government are Key Enablers
- Market Fragmentation is a Key Challenge
- Growing number of Exits through Regional IPO/M&A
- New Wave of Investors and Accelerators
- Ecosystem is still Not Sustainable
- Model for Collaboration with US still evolving



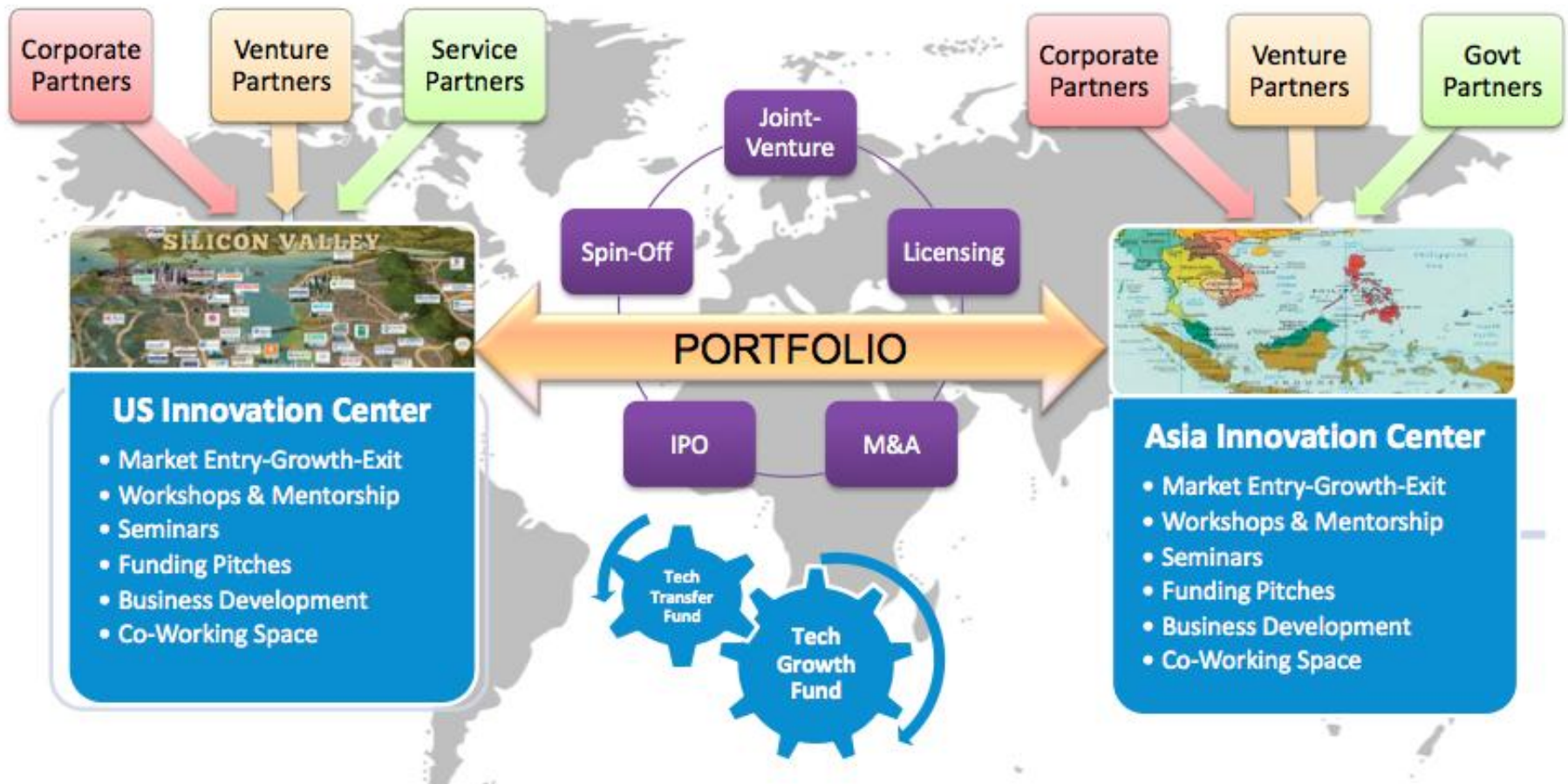
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Building US-ASEAN Innovation Pipeline



US Innovation Center

Workshops



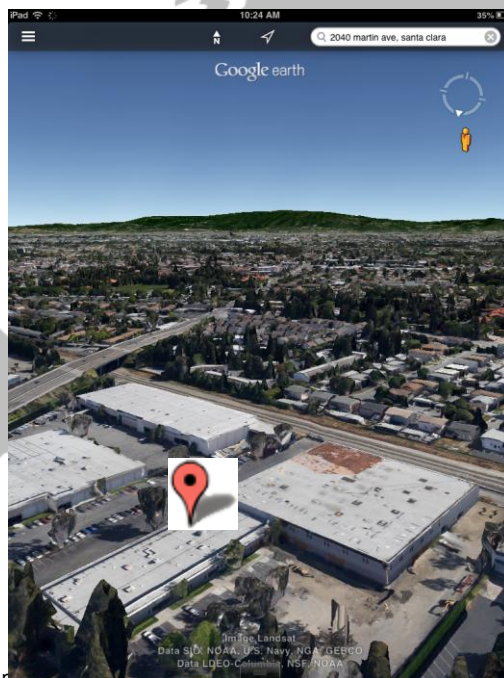
Co-Working Space



Investor Pitches



Networking



Mentors





Accelerator Program

Structured. Outcome Based. Success-Sharing



Seminar

1/2 DAY (20-30 companies)

STEP 1 ASSESSMENT

1 DAY (per company)

STEP 2 GROWTH

3-6 MONTHS (per company)

STEP 3 SCALING

VARYING

GOAL

Assess market-expansion opportunities

SCOPE

Ecosystem, mega-trends, market-entry strategy, pitfalls, best-practices, investment, pitching

OUTCOME

Assessment of opportunities and what it takes to be ready

GOAL

Identify, assess growth opportunities

SCOPE

Product/IP, target-market, business-model, customers, channels, strategic-partners, funding

OUTCOME

Identification of opportunities and market-development plan

GOAL

Validate, establish market traction

SCOPE

Readiness, advisors, product-market fit, intro to partners, pipeline

OUTCOME

Validated market opportunities with market traction

GOAL

Scale business globally

SCOPE

Funding, Business Development

OUTCOME

Mutually agreed milestones

Bridging ASEAN & US Ecosystems

Strategic Benefits

- **Greenfield Market, Business Incentives, IP Protection**
- **Strategic Partnerships, Talent Hub, Low Cost**

Startups Immersion

- **Singapore, Malaysia**

Cross-Border Networking

- **ASVEN**

Cross-Border Accelerators

- **Founder Institute, Bootstrap Labs, PlugandPlay, TGV**

Cross-Border Investors

- **Golden Gate, Sovereign, Elixir, Siemer**



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Thank You

Winston Choe
Managing Partner | Tech Growth Ventures
winston@techgrowthventures.com