Singapore Market Report 2018

Presented by:
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Outline

- Singapore Economy
- Gross Financial Assets
- Singapore GDP
- Household Net Worth
- Securities Market
- Equity Capital Markets
- SGX IPOs and Funds Raised
- SGX Strategic Priorities and beyond
- Major Market Developments
### Singapore Economic Indicators

<table>
<thead>
<tr>
<th>Singapore Economic Indicators</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Q3</td>
<td>Q4</td>
</tr>
<tr>
<td><strong>Real Sector</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Real GDP Growth, y-o-y %</td>
<td>5.5</td>
<td>3.6</td>
</tr>
<tr>
<td>Unemployment Rate, sa, %</td>
<td>2.1</td>
<td>2.1</td>
</tr>
<tr>
<td>Wage Growth, y-o-y %</td>
<td>3.2</td>
<td>4.0</td>
</tr>
<tr>
<td>CPI, All items inflation, y-o-y %</td>
<td>0.4</td>
<td>0.5</td>
</tr>
<tr>
<td>Overall Balance (% of GDP)</td>
<td>10.1</td>
<td>4.7</td>
</tr>
<tr>
<td>Official Foreign Reserves (US$ mil)</td>
<td>275,410</td>
<td>279,900</td>
</tr>
</tbody>
</table>
Gross Financial Assets

Asia’s gross financial assets per capita below global average - Singapore in the top ten

Gross financial assets per capita 2017, in EUR

Source: Allianz Global Wealth Report 2018
Singapore GDP

Source: Singapore Statistics Board
## Singapore Household Net Worth

Singapore Household Assets, Yearly Million S$

### Key Indicators

#### Household Sector Balance Sheet, 2017

<table>
<thead>
<tr>
<th>Assets</th>
<th>Billion Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Assets</td>
<td>1,178.4</td>
</tr>
<tr>
<td>Residential Property Assets</td>
<td>894.5</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>2,072.9</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities</th>
<th>Billion Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mortgage Loans</td>
<td>242.6</td>
</tr>
<tr>
<td>Personal Loans</td>
<td>81.1</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>323.7</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Worth</th>
<th>Billion Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Worth</td>
<td>1,749.3</td>
</tr>
</tbody>
</table>

1 Data are as at end of period.

- Money Supply, M1 <sup>1</sup> was S$183.7bil in 2017
- Official Foreign Reserves <sup>1</sup> was S$374.0bil in 2017
- Assets/Liabilities of Asian Currency Units <sup>1</sup> was US$1,237.9bil in 2017

Source: Singapore Statistics Board
Singapore Securities Market

SGX is the Most International Exchange
Nearly 40% of all companies listed on SGX are overseas companies.

Singapore Exchange
745 Listed Companies
Market Capitalization
US$706 billion

Source: Singapore Exchange
Singapore Equity Capital Markets

Source: Thomson Reuters
SGX IPOs and Funds Raised

Source: Singapore Exchange
Strategic Priorities and beyond

1. Build a multi-asset exchange
   - Expand FX product suite
   - Enhance Bond Trading Platform
   - Develop SGX Cargo and Freight franchise

2. Grow international presence
   - Strengthen overseas presence in U.S. and London
   - Grow our base of buy-side clients (AM, HFT & PTG)

3. Expand networks and partnerships
   - Enter into collaborative agreements to grow cross-border flows and enhance service capabilities

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Nasdaq
Tel Aviv Stock Exchange
Freightos
TRUMID
Major Market Developments

“Trade at Close” (TAC) Session
- This is to allow investors to trade at a fixed (closing) price to preserve integrity of price discovery process

SGX-Bursa Connect
- It is put on hold when Malaysia’s new government took over in May

Regulatory Oversight on Dual Class Shares
- DCS is set to add vibrancy to the capital market.
- SGX has yet to list its 1st DCS shares
- Bipolarised views.
감사합니다

Danke Ευχαριστίες Köszönöm

Thank You Dalu Tack Gracias

Спасибо Dank Seé

Merci

謝謝 ありがとう