



 GlobalData.

Disruptor





Global Crypto Currency market is now worth more than \$500bn



Over 50 billion **connected devices** will exist in 2025



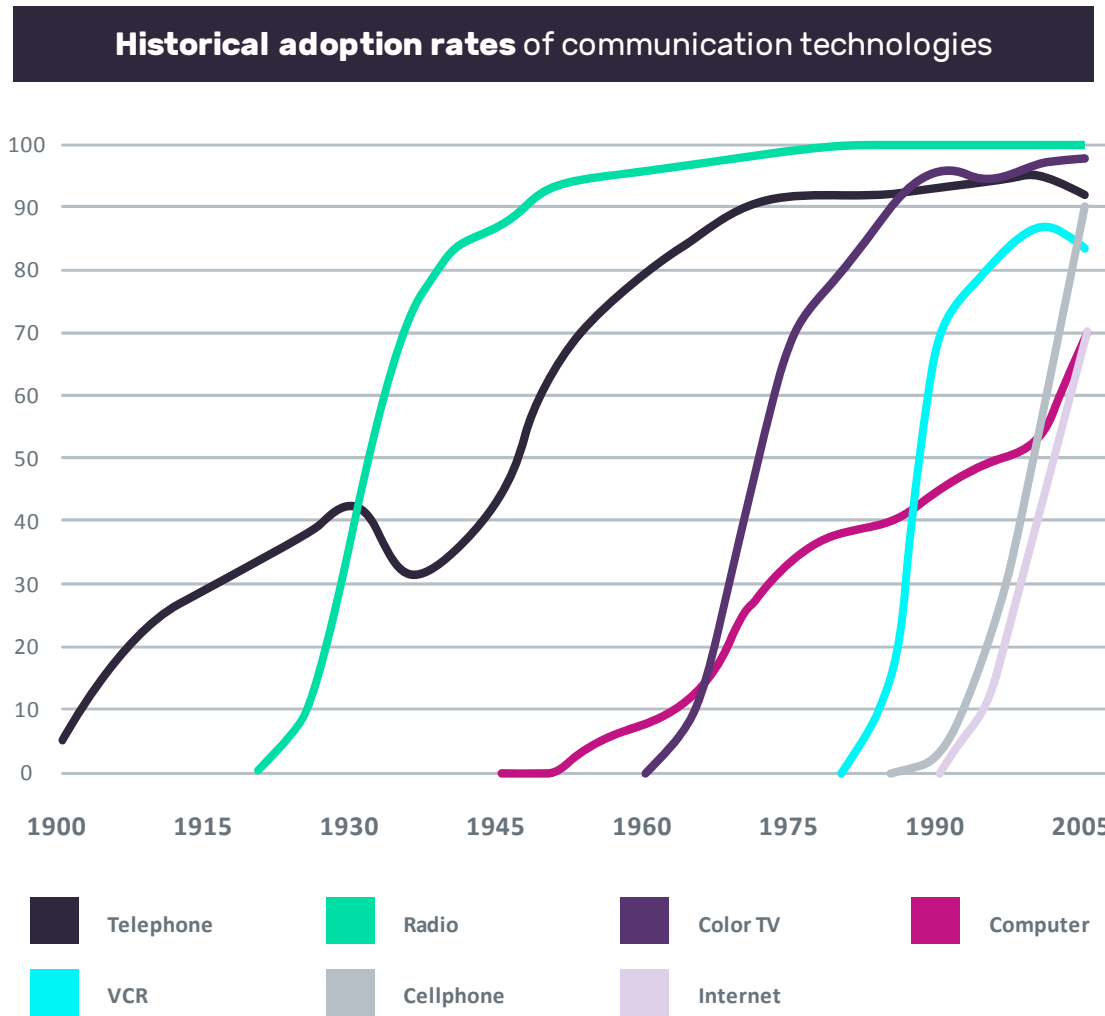
The **global mobile wallet market** is expected to cross \$7.5 trillion by 2025



Over one million **businesses** will adopt **AI technologies** by 2025

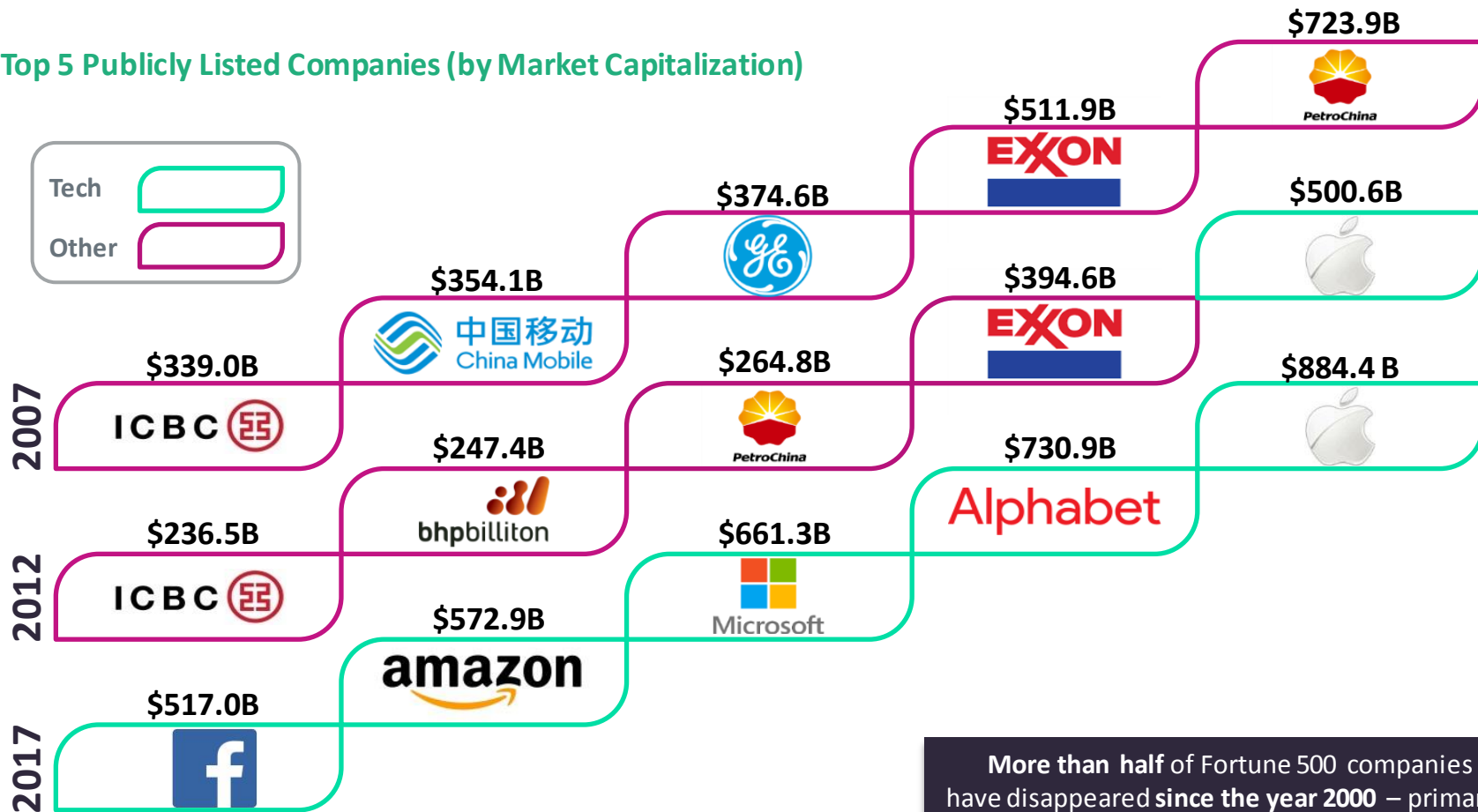


More than 3 mn **Industrial Robots** to be operational by 2020















Tech & tech-enabled companies are now the most valued global enterprises

Top 5 Publicly Listed Companies (by Market Capitalization)



More than half of Fortune 500 companies have disappeared since the year 2000 – primarily due to the impact of digital business models.











Technology is disrupting all sectors

	 Artificial Intelligence	 Blockchain	 Connected Devices & IoT	 Digital Business	 Payment Technologies	 Robotics & Drones	 Security Tech	 Others
 Consumer	#Virtual Assistants #Customer Engagement	#Direct to consumer #Counterfeit Detection	#Smart Homes #Consumer Wearables	# Digital Commerce # Sharing Economy	#Digital Wallets #Virtual Currency	#In-home Robots #Autonomous Vehicles	#Home Security #Intrusion Prevention	#Social Analytics #3D Printing
 Retail	#Bots #In-store Experience	#Warranty Management #Inventory Tracking	#Store Management #Smart Warehouse	# Virtual Stores #Ambient Commerce	#Mobile Wallets #Biometric Payments	#Drone Delivery #In-store Robots	#Biometric Authentication #Smart Store	#VR/AR Experience #Customer Analytics
 Financial Services	#Credit Scoring #Fraud Detection	# Crypto Currency #P2P Payments	#Telematics #Wearables for Banking	#P2P lending #Digital Banks	#Biometric Payments #Wearable Payments	#Robo Advisers #RPA	#Vulnerability Management #Biometrics	#Predictive Analytics #Financial Mgmt. Platform
 Healthcare	#Diagnosis & Detection #Drug Discovery	#Electronic Health Records #Counterfeit Drug Detection	#Mobile Health #Sensors	#Appointment Management #Lifestyle Monitoring	#Automated Claim Processing #Digital Health Wallets	#Robotic Pills #Surgical Robots	#Patient Data #Network Security	#Genomics #Bionics

Technology-enabled companies' business model is to disrupt entire industries and achieve maximum scale

	Artificial Intelligence	Blockchain	Connected Devices & IoT	Digital Business	Payment Technologies	Robotics & Drones	Security Tech	Others
Consumer	amazon alexa	INS	NETATMO	elasticpath	adyen	SoftBank Robotics	Qualcomm	Hootsuite
	CLARABRIDGE	CHRONICLED	JAWBONE	DiDi	coinbase	WAYMO	TREND MICRO	materialise
Retail	slack	Warranteer	xively	symphony RETAIL SOLUTIONS	amazon payments	Flirtey	CROSSMATCH	IKEA Place
	OK	IBM Blockchain	ZEBRA TECHNOLOGIES	sentiance	nymi	bossanova	NOCCELA	Fractal

Technology-enabled companies' business model is to disrupt entire industries and achieve maximum scale

	 Artificial Intelligence	 Blockchain	 Connected Devices & IoT	 Digital Business	 Payment Technologies	 Robotics & Drones	 Security Tech	 Others
 Financial Services	FICO	ripple	Zobie	LendingClub	zwipe	Betterment	ThreatMetrix	alteryx
	H ₂ O.ai	FIS <small>Empowering the Financial World</small>	Apple WATCH	Atom	Alipay	UiPath <small>Robotic Process Automation</small>	M2SYS	Kreditech
 Healthcare	Infermedica	guardtime	AliveCor	Zocdoc	PEGA	Rani <small>THERAPEUTICS</small>	ClearDATA <small>SECURE HEALTHCARE ELLIUM</small>	23andMe
	RECURSION <small>LABORATORIES</small>	BLOCKVERIFY	fitbit	runkeeper	InstaMed <small>PROGRESSIVE PREVENTIVE OPTIMIZATION</small>	INTUITIVE <small>SURGICAL</small>	Secureworks	ekso <small>BIONICS</small>

GlobalData's **Disruptor** is the **leading market intelligence service** that **decodes emerging tech-enabled opportunities** by providing must-have information on promising start-ups, tech-led innovations, latest tech/sector trends, consumer insights, and venture capital portfolio investments.

Six ways in which **Disruptor** drives success in a disruptive world



Monitor competitor strategies

Anticipate emerging competitive threats and future-proof your business

- Pinpoint the emerging disruptors shaping technological change
- Decode competitor strategies to avoid predictable surprises
- Stay up-to-date with competitors' key digital disruption developments

Gain access to:

- A database of more than 40,000 start-ups
- 50 Competitor Ecosystem Reports per year
- Expert opinion from 500+ GlobalData analysts



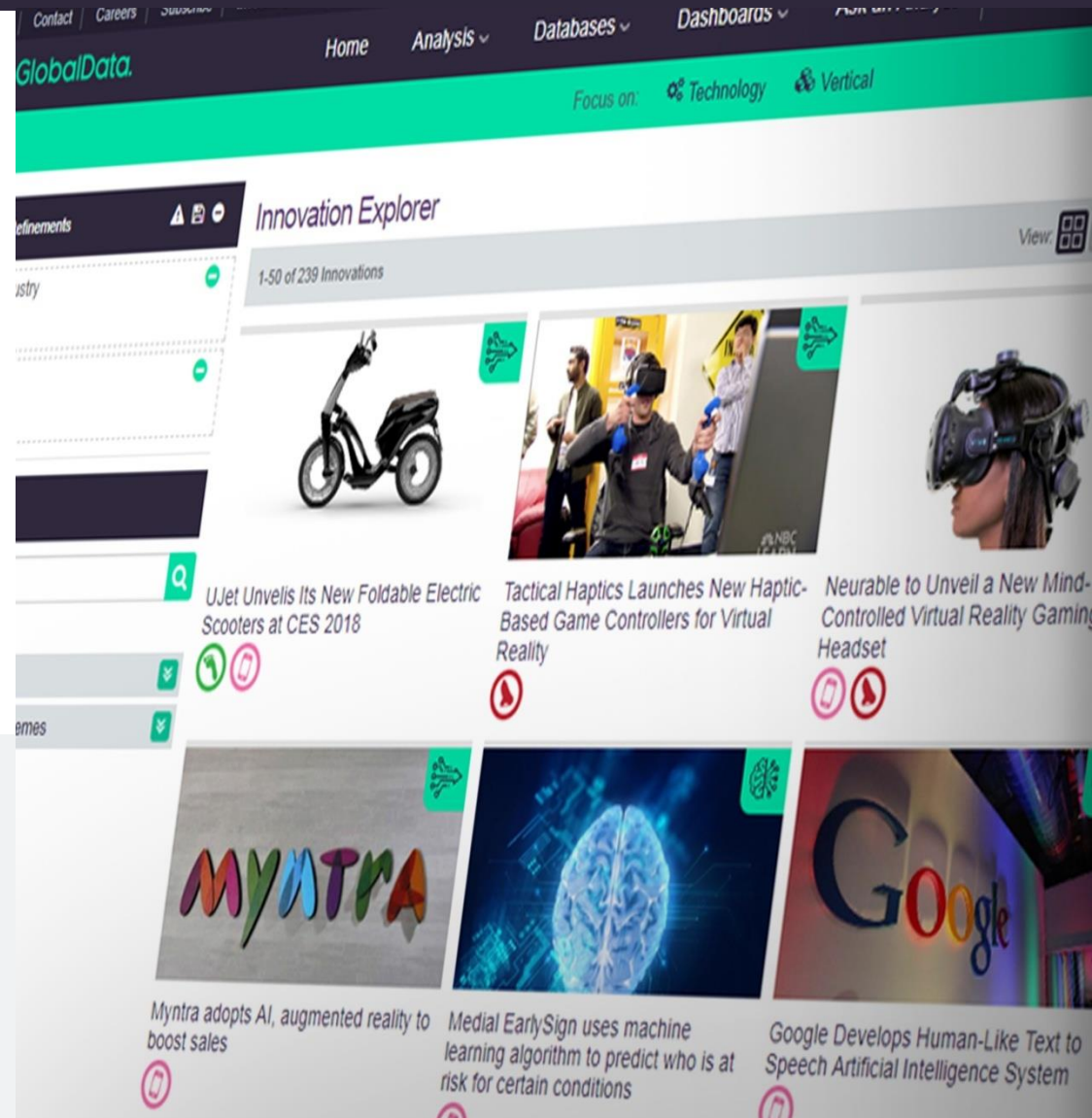


Learn from real-world, high-impact innovation case studies

- Track the latest innovations leveraging disruptive technologies across sectors
- Monitor competitor activity and stay ahead of innovation trends
- Contextualize innovation best practices and monetise Disruptive Innovation
- Stay on the pulse with latest developments
- Inspire innovation by understanding the true nature of latest disruptions

Gain access to:

- Over 1,500 innovation profiles
- 300+ new innovation profiles every month
- 50 Disruptor Case Studies per year



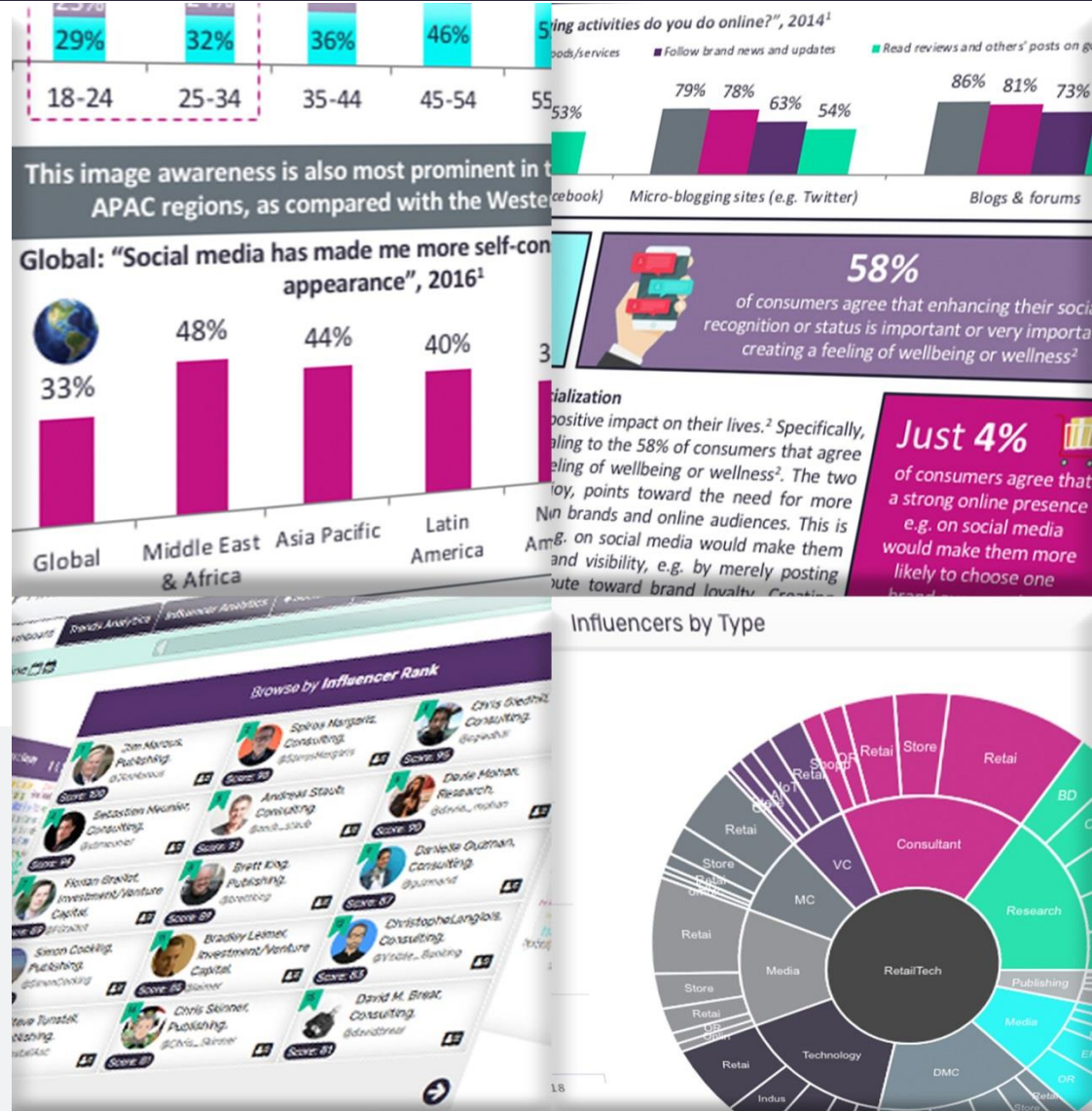


Distinguish reality from media hype

- Cut through the noise in social media by focusing on what matters
- Identify critical insights from the top Influencers per sector via our Influencer Tool
- Protect & grow your brand equity
- Stay in touch with latest developments with real time updates

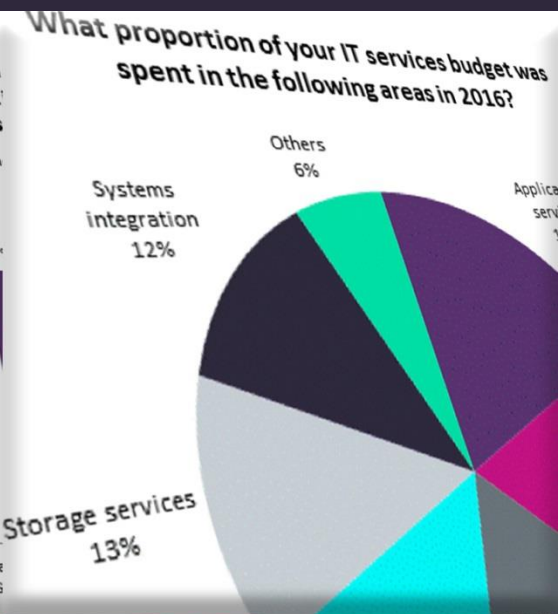
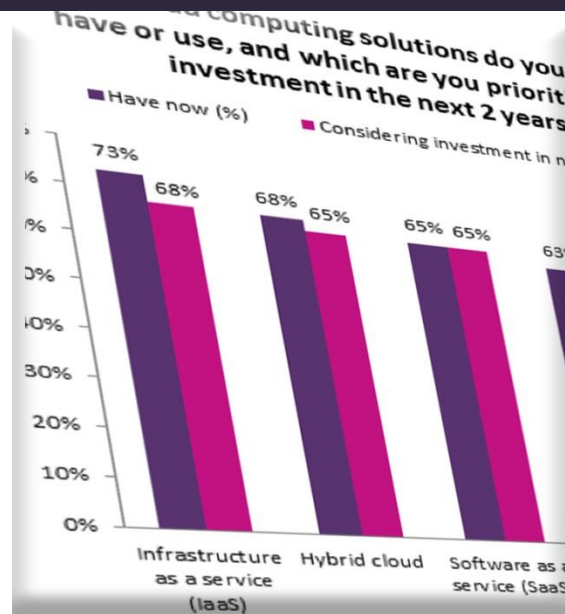
Gain access to:

- Top 100 Influencers per sector (Fintech, HealthTech, DisruptiveTech, RetailTech)
- Analyzing 200,000+ tweets per quarter
- 1,000+ analyst opinions per year



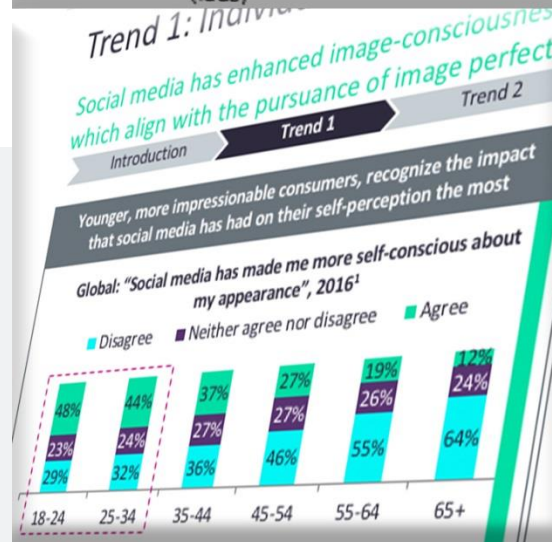
Stay ahead of the curve by uncovering emerging trends

- Identify the players and technologies that will disrupt your core business
- Diversify & expand beyond your core: identify your next market
- Identify the key technologies in which your customers and competitors are investing
- Uncover emerging trends before the competition and get ahead in the digital race



Gain access to:

- 100+ Digital Trends Reports per year
- 50+ monthly newsletters across core verticals per year
- Expert opinion from 500+ GlobalData analysts



present on several

Run competitive sessions on social media to harness the creative power of lower risk strategies

Develop smart packaging codes which allow brands to harness the creative power of individual consumers

Align products with consumer values using claims such as 'natural' and 'healthy' to tap into the consumer's desire for a healthy lifestyle

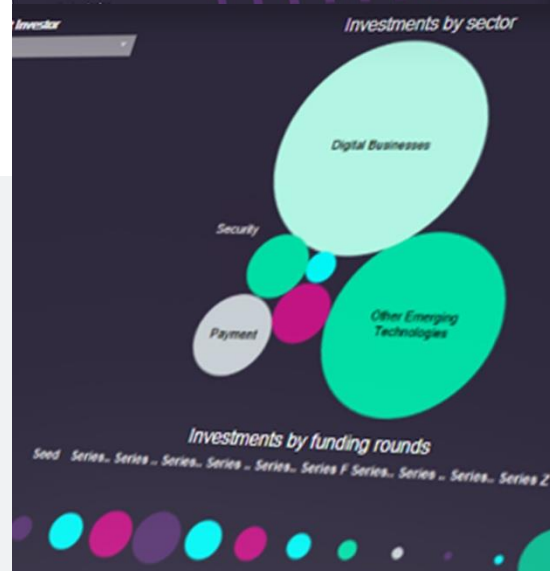
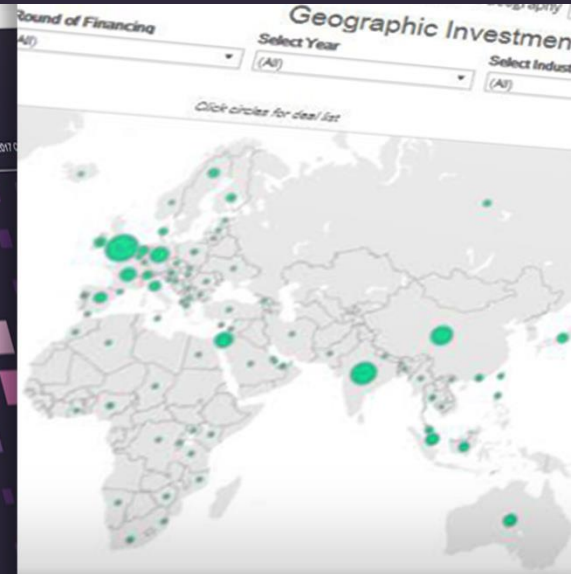
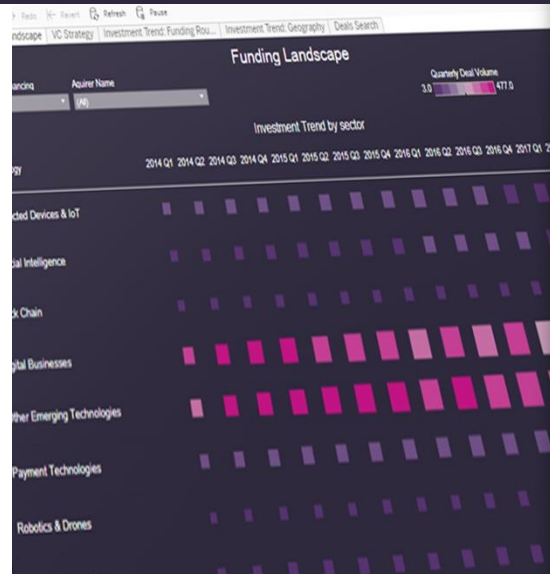
Create products for the on-the-go occasion, and those who are on-the-go and those who are environmentally conscious

Make sound investment decisions in next-generation technologies

- Build your partnership ecosystem to achieve disruption objectives
- Identify and monitor potential partners that will transform your disruptive capabilities
- Track and trace venture capital investments into disruptive tech
- Unpick key investor portfolios and identify hot start-ups by market, funding rounds, and investor sector

Gain access to:

- A database of more than 40,000 start-ups
- 14,000 venture capital and private equity firms
- 20 Smart Money Reports per year





Deliver next-generation customer experiences

- Understand the motivations of the ultimate driver of market change – the consumer
- Identify the requirements of the consumer of the future
- Anticipate customer needs and deliver next-generation products and services
- Identify latest trends and attitudes with techno-economic data on markets and consumers
- Access expert reports and insights curating latest consumer surveys and interviews

Gain access to:

- Techno-economic data on 40+ countries
- Consumer behavior survey across 36 countries & 26,000 respondents
- Fintech Adoption & Awareness survey across 28 countries and 22,000 respondents



Access a complete offering with the intelligence, insights and opinions that will enable your business to **win in a disruptive world**.

COMPANIES	MARKETS	INNOVATION	CONSUMERS	INTELLIGENCE
 Start-ups database of 40,000+ companies	 Smart Money Investments	 Over 1,500 innovation profiles	 Consumer Survey Data & Adoption Studies	 Latest technology news & deals activity coverage
 50 Competitor Ecosystem Reports per year	 100+ Digital Trends Reports per year	 50 Disruptor Case Studies per year	 Techno Economic Data for 40+ countries	 500+ analyst opinions per year
 Expert opinion from 500+ GlobalData analysts	 50+ monthly newsletters across core verticals per year	 Innovation Landscape Reports		 Top 100 Influencers per sector
 Tech Maturity Framework				

- Monitor** competitor strategies
- Monetize** disruptive innovation
- Mine** thought leadership
- Predict** emerging trends
- Decode** smart money
- Capture** digital consumers

Technology data complemented by in-house expertise in vertical industries like Healthcare, Consumer, Retail and Financial Services.

Trending Disruptive Tech Segments

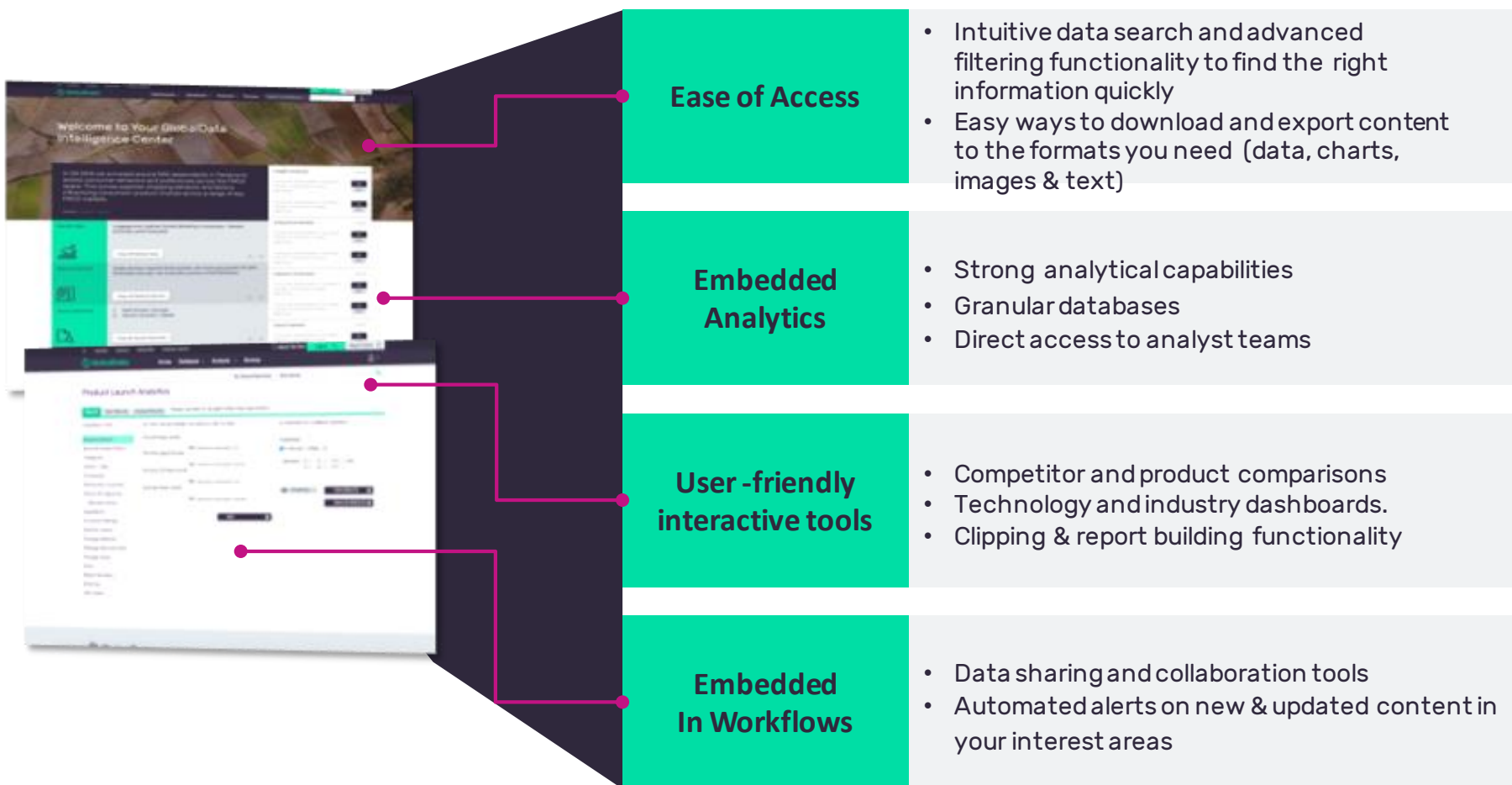
Artificial Intelligence	Blockchain	Connected Devices & IoT	Digital Business	Payment Technologies	Robotics & Drones
Machine Learning Natural Language Processing Decision Management ...	Financial Markets Data Sharing Identity Management. ...	Connectivity Platforms Beacons NFC ...	E Commerce Social Platforms Apps & Platforms....	Crypto Currency POS Digital Wallets ...	Autonomous Vehicles Smart Robots Commercial UAVs ...
Security Tech	Others	Consumer	Retail	Financial Services	Healthcare
Fraud Protection User & End Point Behavioral Analytics IOT Security ...	3D Printing Enabling Solutions Analytics ...	Smart Homes Mobile Wallets Wearables...	Payment Platforms Augmented/Virtual Reality Digital Content Recognition ...	Chatbots Peer-to-Peer Payments Marketplaces...	Genomics Mobile Medical Devices Electronic Patient Records....

Our Intelligence Center delivers all our services through **a single platform, with combined search, browse, and alert functionality.**

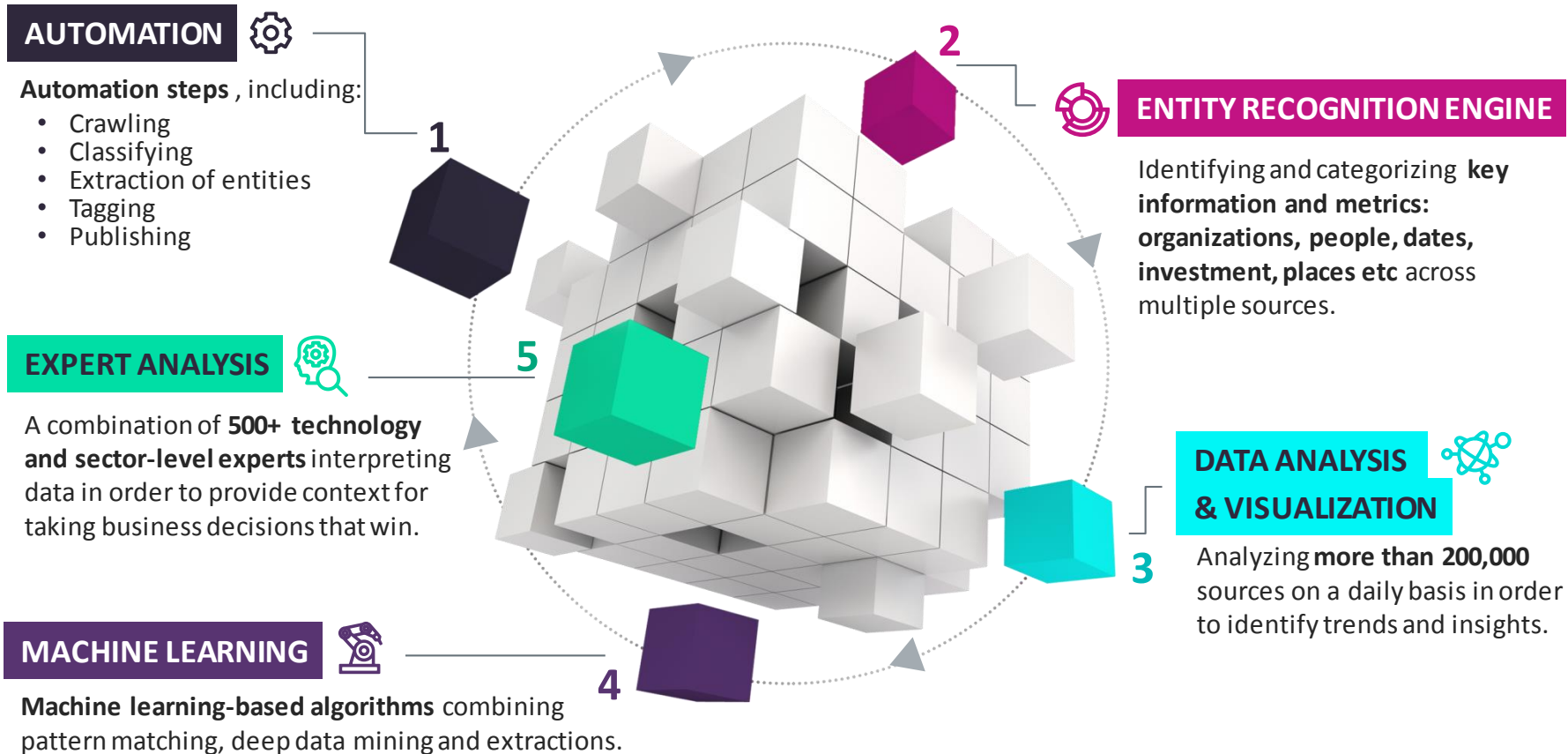
- Technology
- Vertical

Single platform, expert tools – seamlessly integrate into your workflow

Our Intelligence Center offers a mix of data visualization, analytical tools, presentations, reports and export tools to slot seamlessly into your workflow.



A combination of **machine learning algorithms, advanced data mining capabilities and expert analysis** guarantees **reliable and insightful outputs**, enabling your business to confidently make decisions that will drive top-line growth.



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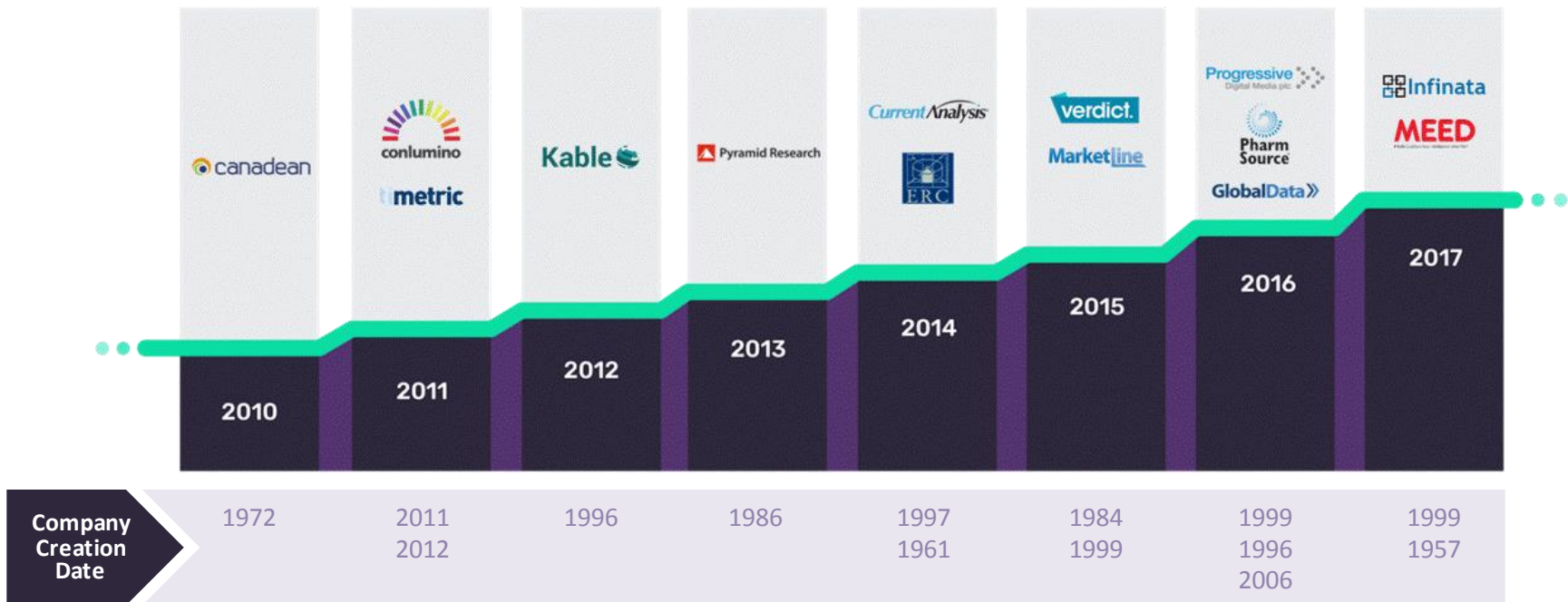
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Appendix

GlobalData story

GlobalData, incorporated in 2016 based on brands with a long history, has now become the fastest growing Data & Analytics company in the LSE – 65% growth in 2016 and \$600M market cap.

Acquisition Timeline



GlobalData is a **leading Data & Analytics company** who, for over 40 years, has been helping over 4,000 organizations worldwide to make better and more timely decisions.



OUR PEOPLE

- 2,440 employees in 23 offices worldwide
- 1,200 researchers
- 600 global analysts supporting clients 1-on-1 more than 315,000 times a year
- 145 client services and account managers driving 90% renewal rates
- 70 journalists



OUR DATA & INSIGHTS

- Real time tracking of 200,000+ companies, 70,000 M&A deals, 117 technologies, 25,000 industry opinion leaders and 2M new product innovations across 200 countries & 2,000 cities
- 540,000 consumer survey responses
- Publishing 13,000 reports annually, including databooks
- Quoted c.20,000/year by business press e.g. FT, SKY News & Bloomberg



OUR CLIENTS

- Serving 4,000 of the world's leading companies in 160 countries
- 73% of the FTSE 100 companies
- 60% of Fortune 100 companies
- 66% of DJAsian Titans 50 index

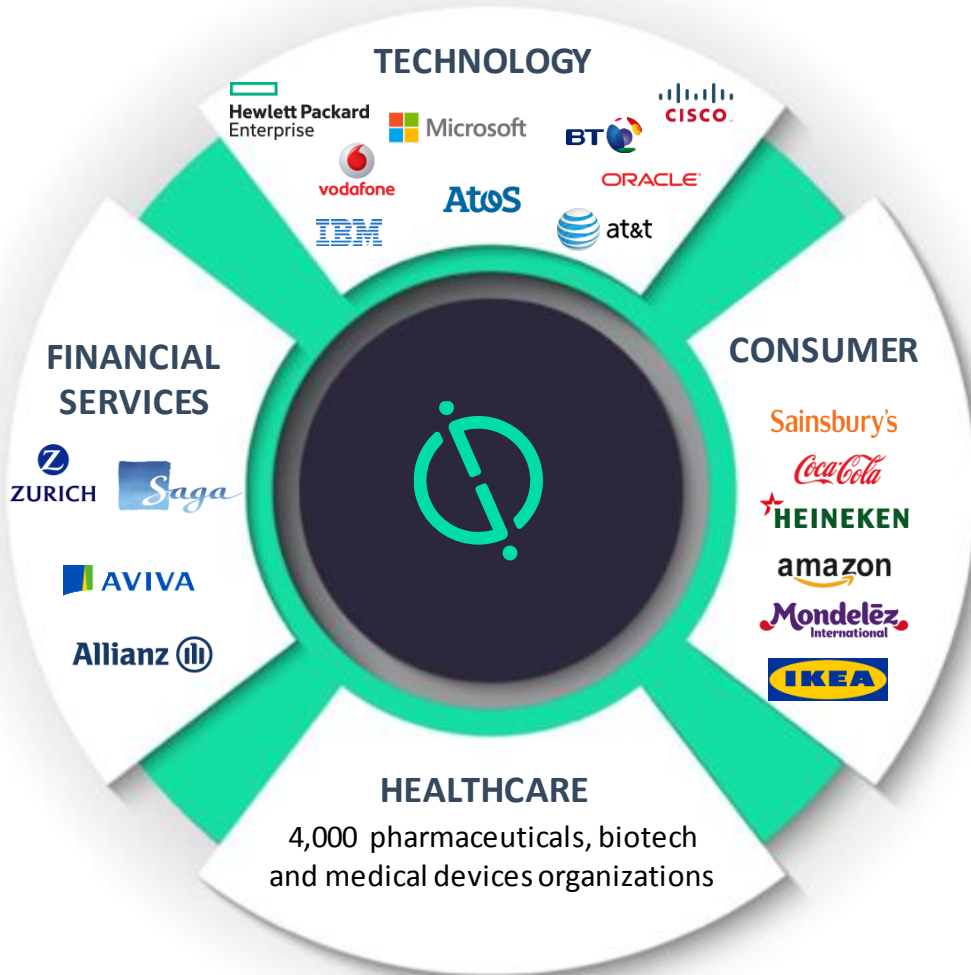


**Our mission is to help our clients decode the future
to be more successful and innovative**



A unique view of your value chain

We work with **over 4,000** organizations worldwide



“The research GlobalData provides is of significant value, and is the key source of a lot of market intelligence for us.”



ORACLE “I’ve set up my own profile on GlobalData specific to my needs, and find the service very useful.”

I find GlobalData an invaluable source of relevant information... it is the only information source I rely on for good, honest detail.”

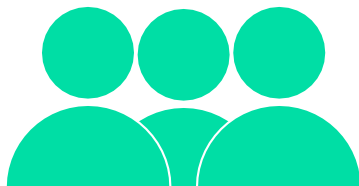


Appendix

Features

Your trusted partner in a disruptive world

500+
ANALYSTS



Experienced
Industry
Hires



Top 100
Global
University
Recruits



Primary &
Secondary
Research
Teams

Global Presence

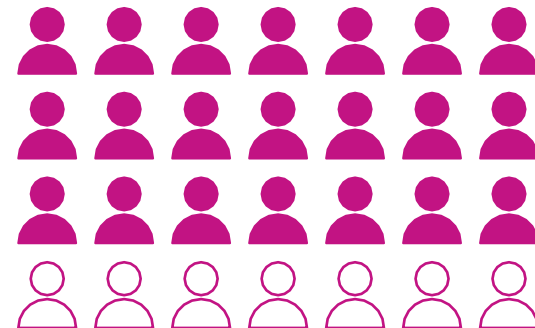
London Sydney New York
Boston Paris Dubai
Hyderabad Hong Kong Singapore
Singapore Shanghai San Francisco
Sao Paulo Seoul Mexico City
Buenos Aires
Kuala Lumpur

START UPS



Healthcare Consumer Retail Financial Services Other

40,000+



1,500+

INNOVATION EXAMPLES



Artificial Intelligence



Blockchain



Connected Devices & IoT



Other



Digital Businesses



Payments Tech



Robotics & Drones



Security Tech

REPORTS & BRIEF

350+

Reports & Briefs



500+ INFLUENCERS AND OPINION LEADERS



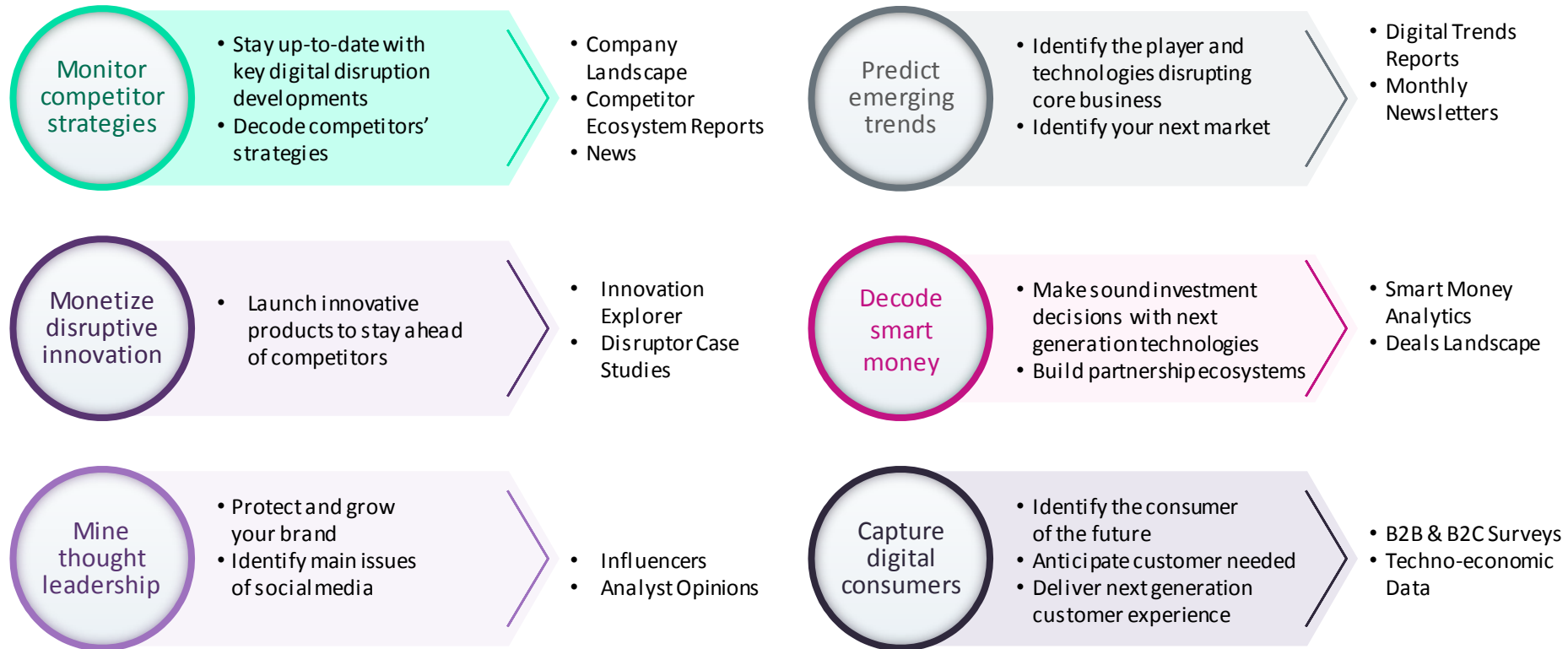
3,000+ B2B SURVEY
RESPONSES &
FINDINGS



NEW & DEALS

Repository of 150,000+
News & Deals

Access a complete offering with the intelligence, insights and opinions that will enable your business to **win in a disruptive world.**



Providing custom support

Our **CONSULTING** offering provides tailored solutions to help clients identify new growth opportunities, minimize risk, gain competitive advantage, and improve profitability.

GLOBAL REACH, LOCAL INSIGHT



OUR GLOBAL REACH

Delivering value for companies across all regions globally



OUR PEOPLE

A team of eight management consultants specializing in diverse sectors



OUR PROJECTS

50+ completed projects in the last two years



OUR CLIENTS

Successfully delivered consulting solutions to market-leading FS companies in every sector



INNOVATION & INSIGHT



OPPORTUNITY ASSESSMENT



MARKET & PRODUCT STRATEGY



MARKETING COMMUNICATIONS



FINANCIAL ANALYSIS



REGULATORY, TRADE & INDUSTRY



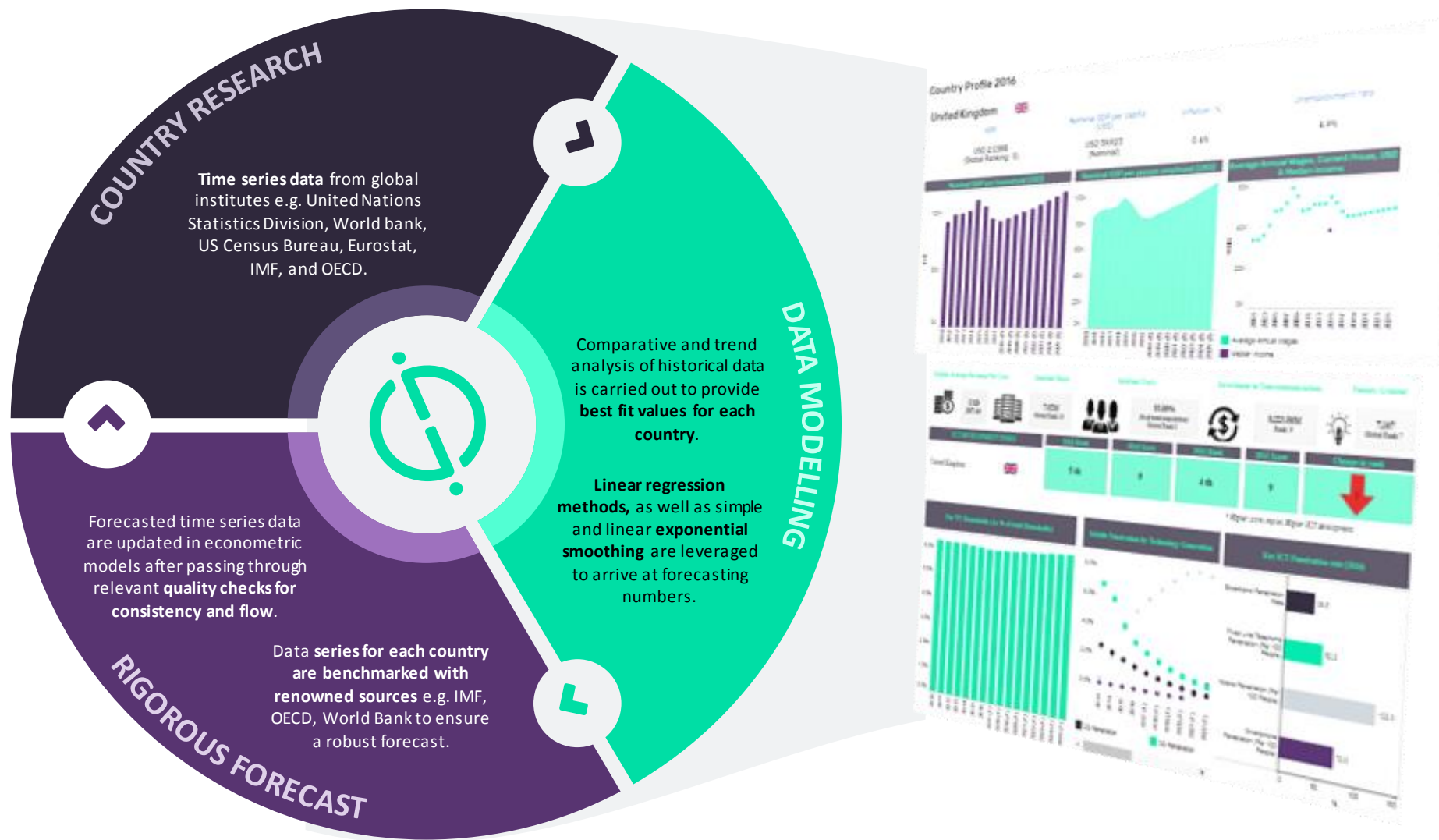
COMPETITIVE & COMPANY ANALYSIS



FORECASTING

Appendix

Methodologies

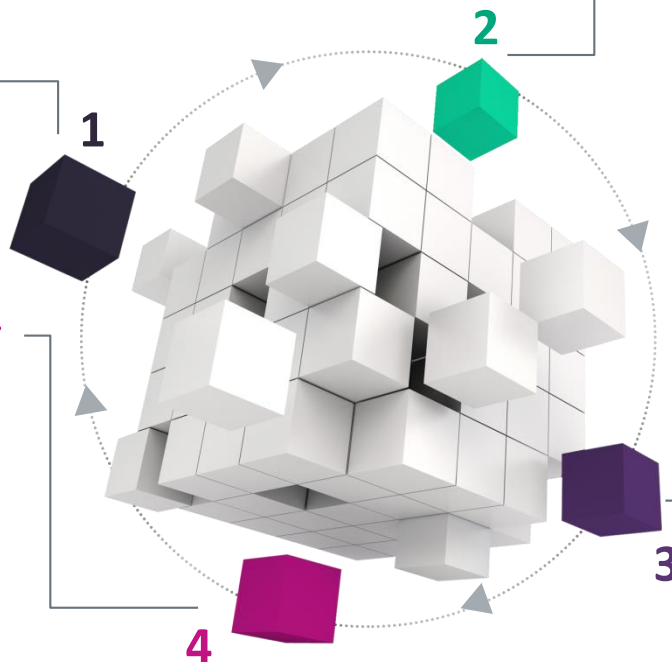


SEGMENT TECHNOLOGIES

- Each technology is segmented into a set of individual use cases
- Vendors supporting each use case are identified

IGNORE. EXPLORE. INVEST.

- Use cases are segmented into three groups:
 - Ignore – market not ready/ no business impact
 - Explore – requires further investigation
 - Invest – high degree of market readiness and business impact
- Conclusions based on:
 - Market demand
 - Feedback from cross-section of enterprises
 - Expert analyst insights



MARKET READINESS

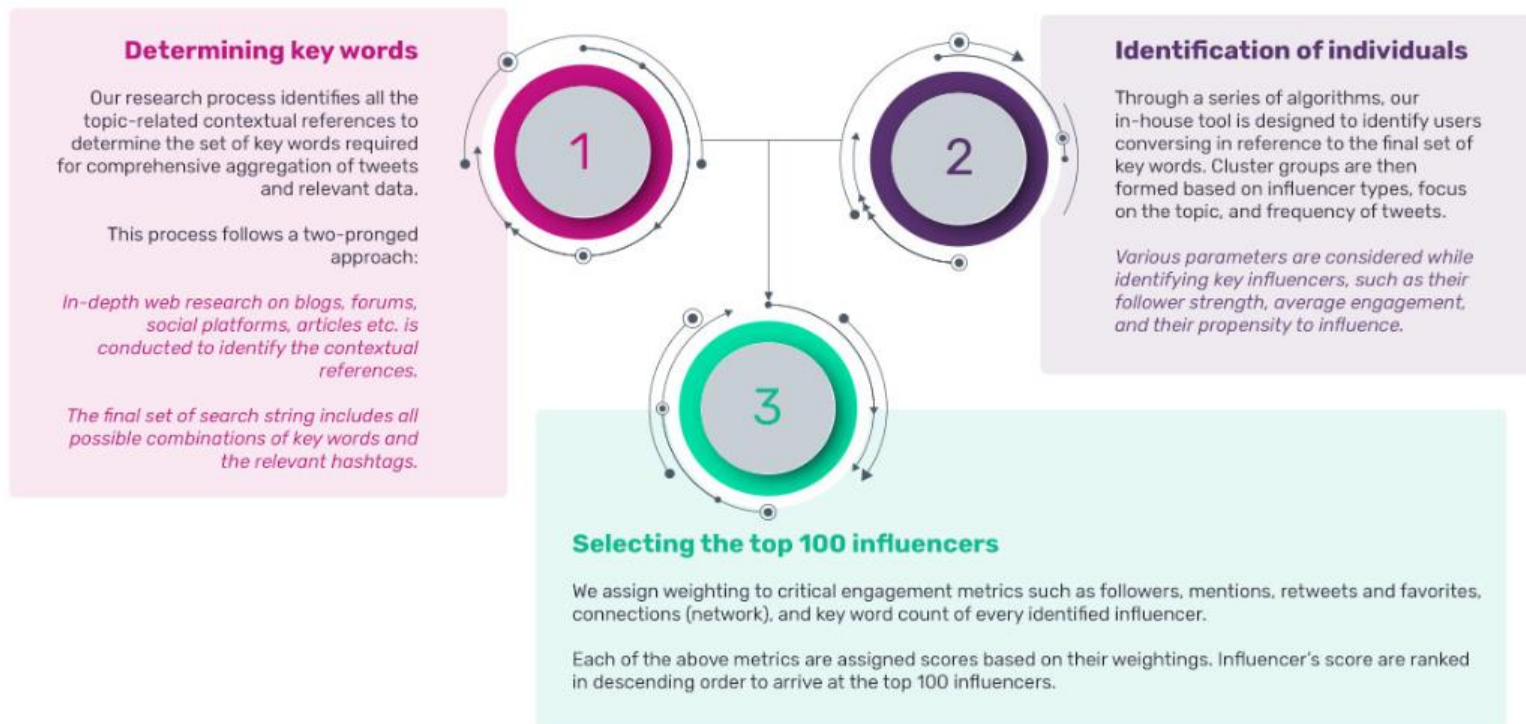
- A market readiness score is provided using the following criteria:
 - Ecosystem readiness (state of the vendor community, extensible platforms, maturity standards, established deployment and consumption models, contained costs)
 - Customer readiness (established customer and geographic deployment bases, industry support, breadth of industry expertise)
- A score is provided on a scale of 0-10

BUSINESS IMPACT

- A business impact score is determined using the following criteria:
 - Cost reduction
 - Revenue growth
 - Proof points around market impact (displacement of older technologies, impact on competing technologies and vendors, and market projections)
- A score is provided on a scale of 0-10

The Influencers tool is based upon two main stages of Influencer identification, followed by analysis of the topics and level of influence of this group.

A **three step process** is followed: Initially, an exhaustive list of keywords is determined to define a project area. This set of keywords is then used as an input to a proprietary algorithm that results in a detailed list of the key individuals associated with these keywords. Finally, a series of algorithms is then used to determine the 100 most important influencers within this initial list.

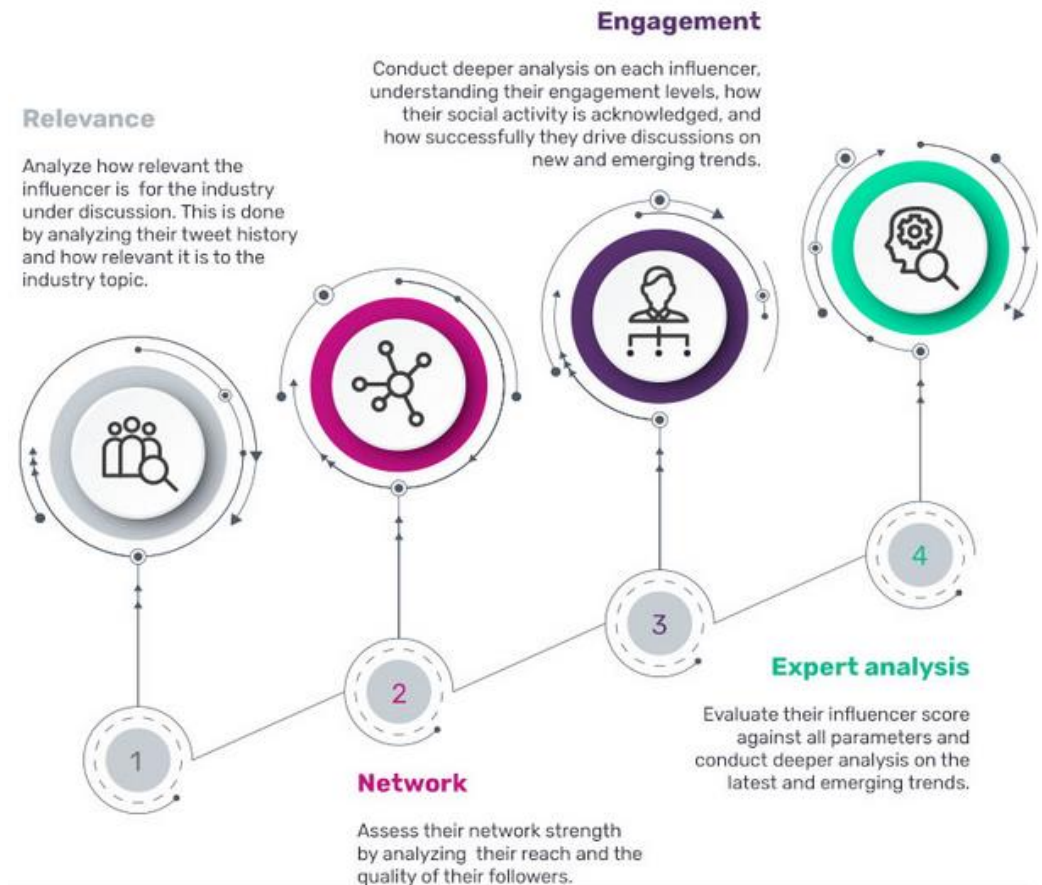


In the second and third stages of the process, a series of parameters are analyzed based on key pillars of relevance, network and engagement.

GlobalData's proprietary Influencer Identification Framework is based on a scientific process that works on pre-defined parameters using our proprietary algorithms.

Our multi-stage methodology works on the pillars of relevance, network, engagement, and our deep analysis by evaluating the following parameters:

- **Relevance** – Tweets relevant to our subject; the number of times influencers use relevant and most appropriate keywords in their tweets
- **Network** – Number of followers; connections within the shortlist of influencers
- **Engagement** – The number of times tweets are re-tweeted; the number of times influencers are mentioned
- **Expert analysis** – A combination of proprietary algorithms as well as inputs from in-house sector experts



Tracking key vendor websites, emerging disruptors, award-winning technology companies, and the venture capital universe in order to provide **real-world disruptive innovation examples** that help clients **transform disruption into top-line growth**.



Our selection process focuses on new investment opportunities, concept and beta-stage ideas, as well as product launches.



We also track research updates from leading universities and institutes, as well as key global events and exhibitions.



Our Influencers database, tracking the top 100 global thought leaders across various industries, enables us to understand potential areas where disruptive innovations are emerging.

The way in which we capture data for the Innovation Explorer involves a top-down approach consisting of the following steps:

- Tracking innovations across **eight emerging technology themes**:
 - Artificial Intelligence
 - Blockchain
 - Connected devices & IoT
 - Digital business
 - Payment technologies
 - Robotics & Drones
 - Security technology
 - Others
- Grouping applications at an **industry and vertical** level
- **Categorization of trends** associated with the identified innovations e.g. Health & Wellness, Individualism & Expression, Smart & Connected
- Identifying the impact in terms of concept, nature of disruption, and outlook

Our database hosts profiles for **over 40,000 high-impact companies**, leveraging a robust selection process to identify **the most disruptive technology companies**.

