

Agenda

Deutsche Bank Center - One Columbus Circle (Enter via 58 Street entrance), New York, NY 10019

Time	Events	Location
7:30 am	Conference Registration & Breakfast	Coliseum Foyer, 10th Floor
8:00 am – 5:00 pm	One-on-One Meetings	9 th , 10 th and 11 th Floors
Time	Panels	Location
9:00 – 9:45 am	Direct-to-Device Connectivity Scott Wisniewski, President & Chief Strategy Officer, AST Space Mobile Paul Jacobs, Chief Executive Officer, Globalstar Mathew Desch, Chief Executive Officer, Iridium Daniel Dooley, Chief Commercial Officer, Lynk Global Moderated by Bryan Kraft, Director, Deutsche Bank	Bridges Suite
10:00 – 10:45 am	Beyond Earth Tejpaul Bhatia, Chief Revenue Officer, Axiom Space Peter McGrath, Chief Financial Officer, Intuitive Machines Max Haot, Chief Executive Officer, Vast Moderated by Edison Yu, Director, Deutsche Bank	Bridges Suite
11:00 – 11:45 am	Buses, Payloads and Components André Wall, Chief Executive Officer, Beyond Gravity Chris Johnson, Chief Executive Officer, Maxar Space Systems Mike Greenley, Chief Executive Officer, MDA Space Jonathan Baliff, Chief Financial Officer, Redwire Moderated by Edison Yu, Director, Deutsche Bank	Bridges Suite
12:00 – 1:30 pm	Lunch Panel: Outlook for Space Investment Tony Kim, Managing Director, Fundamental Equity, BlackRock Carl Sjolund, Partner, EQT Mark Boggett, Chief Executive Officer & Managing Partner, Seraphim Moderated by Edison Yu, Director, Deutsche Bank	Coliseum Suite
2:00 – 2:45 pm	Geospatial Intelligence Brian O'Toole, Chief Executive Officer, BlackSky Mike Safyan, VP, Launch and Strategic Initiatives, Planet Peter Platzer, Chief Executive Officer, Spire Gabe Dominocielo, President, Umbra Moderated by Edison Yu, Director, Deutsche Bank	Bridges Suite
3:00 – 3:45 pm	Defense Technology John Serafini, Chief Executive Officer, HawkEye 360 Derek Tournear, Director, US Space Development Agency (SDA) Even Rogers, Chief Executive Officer, True Anomaly Craig Miller, President, Global Space Networks, Viasat Moderated by Scott Deuschle, Director, Deutsche Bank	Bridges Suite

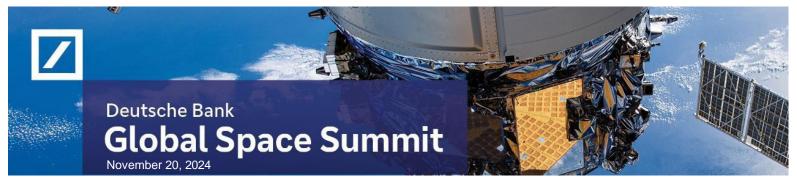
4:00 - 4:45 pm

The Launch ShortageJason Kim, Chief Executive Officer, Firefly Aerospace Eric Romo, President & Chief Operating Officer, Impulse Space Paul Croci, Chief Financial Officer, Stoke SpaceTechnologies Moderated by Edison Yu, Director, Deutsche Bank

Bridges Suite

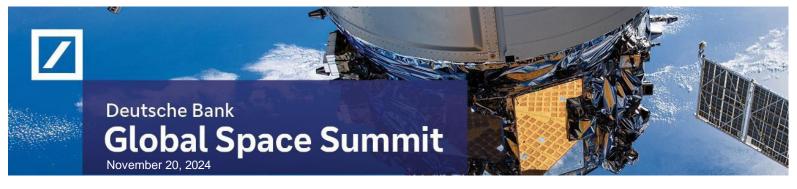
Time	Event	Location
5:00 – 6:00 pm	Cocktail Reception	Der Bulle, 10 th Floor

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Panel descriptions

Time	Event	
Direct-to-Device Connectivity 9:00-9:45am	Due to the growing interest in providing connectivity by satellites directly to phones, the satellite D2D market has become an exciting area in the Space industry. As technology continues to advance in connectivity capabilities, particularly with regard to data and voice, a vast and accessible market will emerge that is expected to be revolutionary for Space connectivity with affordability and service quality. The advancements in technology along with growing adoption rates will provide an opportunity for the D2D sector to potentially generate ~\$140bn in cumulative service revenue over the next decade, reaching annual revenue of ~\$50bn by 2032	
Beyond Earth 10:00-10:45am	Beyond Earth has come to represent a variety of activities in Space, including tourism, habitats, debris removal, lunar exploration and Space situational awareness. This segment is expected to unlock countless new applications for the Space industry, propelling creative ideas and technologies, influencing how humans will interact in Space in the future and creating opportunities for interplanetary travel and long-term missions. Each application is expected to experience single to double digit growth over the next several years - for example, Space tourism is expected to reach a market size of ~\$4bn by 2032 (~20% CAGR), Space situational awareness is projected to reach ~\$3bn by 2032 (~5% CAGR) and Space habitats is expected grow to ~\$156m by the end of 2030 (~8% CAGR)	
Buses, Payloads & Components 11:00-11:45am	The satellite buses / payloads / components market is naturally very diverse and its growth is correlated with plans to deploy more satellites into orbit. After the satellite components sector had been significantly impacted due to supply chain disruptions during COVID-19, the market is expected to expand annually in the mid-single digits over the next decade, reaching an estimated TAM of ~\$87bn by 2032 (bus market size: • ~\$71bn; payload market size: ~\$16bn). Growth will be driven by the high demand for deployment of small satellites into LEO, a rise in space • exploration missions and a decrease in space launch costs	
Lunch Panel Outlook for Space Investment 12:00-1:30pm	This panel brings together investors from various stages of growth in a company's lifecycle, from early-stage VC investors to growth PEs to public institutional investors. Panel speakers will provide their views on the uniqueness of investing in the Space sector, and how they considered strategic and financial merits in their investment decisions	
Geospatial Intelligence 2:00-2:45pm	This panel discusses trends in Earth observation through commercial satellites in the backdrop of an evolving geopolitical climate. While governments are currently large, lucrative customers and growing their usage, several incremental secular drivers in the commercial realm include terrestrial operations optimization, risk mitigation, and ESG monitoring. The global geospatial analytics market is projected to grow from ~\$79bn in 2023 to ~\$142bn in 2028, representing a CAGR of ~13%	
Defense Technology 3:00-3:45pm	Space plays a critical role in defense and security, which rely on Space-based services every day to execute their missions. Increasingly, the commercial Space sector is developing capabilities, services and innovative technology that have potential to support the defense department and national security. Government entities, such as the DoD, are expected to seize these opportunities by integrating commercial Space solutions into their architectures	
The Launch Shortage 4:00-4:45pm	Rocket launch is sometimes perceived to be a commoditized business, but in fact a shortage has emerged that could persist for several years, with industry TAM growing from ~\$8bn now to ~\$35bn by 2030, representing a ~20% CAGR, supported by robust pricing dynamics. Developing a reliable rocket is very difficult and demand from both governments and commercial operators is increasing, underpinned by a "new Space race" between the US and China	



Attending companies

Public companies	
Airbus	Blue Origin
AST SpaceMobile	Axiom Space
Iridium	Intelsat
Eutelsat	Maxar Space
Globalstar	Firefly Aeros
Viasat	HawkEye 360
MDA Space	Beyond Grav
Telesat	ICEYE
Space42	True Anomal
Astroscale	Astranis
Gogo	Lynk Global
Redwire	Aalyria
Planet	Aerospacelal
Intuitive Machines	Agile Space I
Spire	Agnikul
Ovzon	All.Space
BlackSky	Antaris
Imagesat International (ISI)	Arkisys
Gilat Satellite Networks	Array Labs
SatixFy	Astra
GomSpace	Atlas Al
C-COM	Cailabs
O-OOIVI	Dhruva Spac
	eSAT Global
	ETA Space

inies							
Private companies							
Blue Origin	GHGSat	Phase Four					
Axiom Space	Gigit Security	Phasetrum					
Intelsat	Globalsat	PLD Space					
Maxar Space	Gran Systems	Qosmosys					
Firefly Aerospace	HEO Space	Radian Aerospace					
HawkEye 360	HStar Space	Ramon.Space					
Beyond Gravity	Hubble Network	RS Metrics					
ICEYE	Impulse Space	Samara Aerospace					
True Anomaly	In Orbit Aerospace	SatVu					
Astranis	iSEE	Scout Space					
Lynk Global	K2 Space	Seer Al					
Aalyria	Kayrros	Skyloom					
Aerospacelab	KinetX	Source Energy					
Agile Space Industries	Leaf Space	SpaceRake					
Agnikul	Little Place Labs	SpinLaunch					
All.Space	Loft Orbital	Star Catcher					
Antaris	Lonestar	Starfish Space					
Arkisys	Manga Petra	Stoke Space Technologies					
Array Labs	mPower Technology	Stratospheric Platforms					
Astra	Novawurks	Terran Orbital					
Atlas Al	NUVIEW	Umbra					
Cailabs	OffWorld	Ursa Space Systems					
Dhruva Space	Omnispace	Vast					
eSAT Global	Orbex	Volta Space					
ETA Space	Orbion Space Technology	Wyvern					
Exotrail	Orbit Fab						
	Orbital Sidekick						
	Phantom Space						