



Deutsche Bank Global Space Summit

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	9th, 10th and 11th 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 <i>Moderated by Bryan Kraft, Director, Deutsche Bank</i>	Bridges Suite
10:00 – 10:45 am	Beyond Earth Tejpaal Bhatia, Chief Revenue Officer, Axiom Space Peter McGrath, Chief Financial Officer, Intuitive Machines Max Haot, Chief Executive Officer, Vast <i>Moderated by Edison Yu, Director, Deutsche Bank</i>	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 <i>Moderated by Edison Yu, Director, Deutsche Bank</i>	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 <i>Moderated by Edison Yu, Director, Deutsche Bank</i>	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 <i>Moderated by Edison Yu, Director, Deutsche Bank</i>	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 <i>Moderated by Scott Deuschle, Director, Deutsche Bank</i>	Bridges Suite



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4:00 – 4:45 pm

The Launch Shortage

Jason 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, 10th Floor



Deutsche Bank Global Space Summit

November 20, 2024

Panel descriptions

Time	Event
Direct-to-Device Connectivity 9:00-9:45am	<p>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</p>
Beyond Earth 10:00-10:45am	<p>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)</p>
Buses, Payloads & Components 11:00-11:45am	<p>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</p>
Lunch Panel Outlook for Space Investment 12:00-1:30pm	<p>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</p>
Geospatial Intelligence 2:00-2:45pm	<p>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%</p>
Defense Technology 3:00-3:45pm	<p>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</p>
The Launch Shortage 4:00-4:45pm	<p>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</p>



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Attending companies

Public companies

Airbus
AST SpaceMobile
Iridium
Eutelsat
Globalstar
Viasat
MDA Space
Telesat
Space42
Astroscale
Gogo
Redwire
Planet
Intuitive Machines
Spire
Ovzon
BlackSky
Imagesat International (ISI)
Gilat Satellite Networks
SatixFy
GomSpace
C-COM

Private companies

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