

Smart mobility

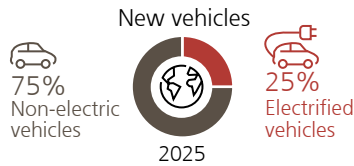
Longer Term Investments (LTI)

Regulatory changes and technological advances will lead to greater electrification of cars, autonomous driving, and new car-sharing mobility concepts. Over the next decade, we expect smart mobility to grow substantially, revolutionizing not only the automobile industry but also the way vehicles are “consumed.”

Projections and opportunities

Electrification

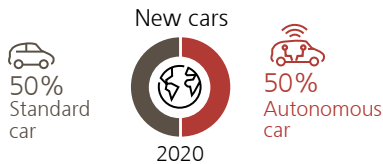
25% of new vehicles sold globally are estimated to be electrified by 2025, with at least 10% being battery electric.



Source: UBS, 2019

Autonomous driving

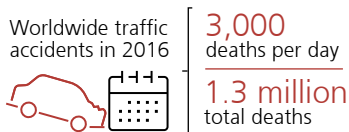
By 2020, around 50% of all new cars could be equipped with some kind of basic autonomous equipment.



Source: UBS, 2018

Impact investing (SDG No.3)

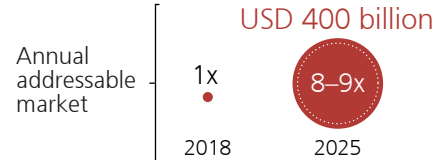
In 2016, more than 1.3 million people died from traffic accidents worldwide – i.e. more than 3,000 per day.



Source: World Health Organization, 2016 data

Smart Mobility

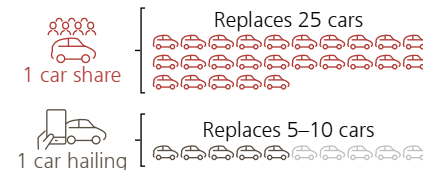
By 2025, the annual addressable market of our theme is estimated at around USD 400 billion, or 8–9 times today’s size.



Source: UBS estimates November 2018; car-sharing/car-hailing numbers based on Goldman Sachs, September 2017 and UBS estimates, November 2018

Car sharing/car-hailing

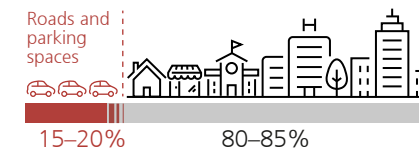
One car sharing could replace up to 25 private cars, and car hailing an estimated 5–10 cars.



Source: UBS, November, 2018

Impact investing (SDG No.11)

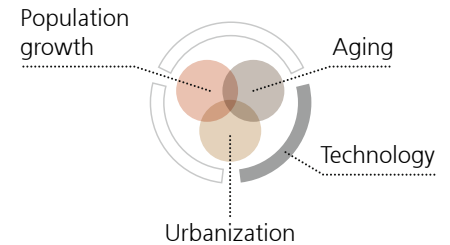
Roads and parking spaces use up 15–20% of city space. Car sharing should reduce parking and road space needed.



Source: UBS, 2019



Smart mobility investment properties



○ Influencer ⊗ Key drivers



Near-term drivers

- Electrification
- Autonomous driving
- Car-sharing/car-hailing



Sustainable investing impact

- Safety
- Better fuel efficiency
- Lower emissions
- Better inclusion
- More green spaces



Impact investing (UN SDGs)

- SDG 3: Good health and well-being
- SDG 11: Sustainable cities and communities
- SDG 13: Climate action

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