



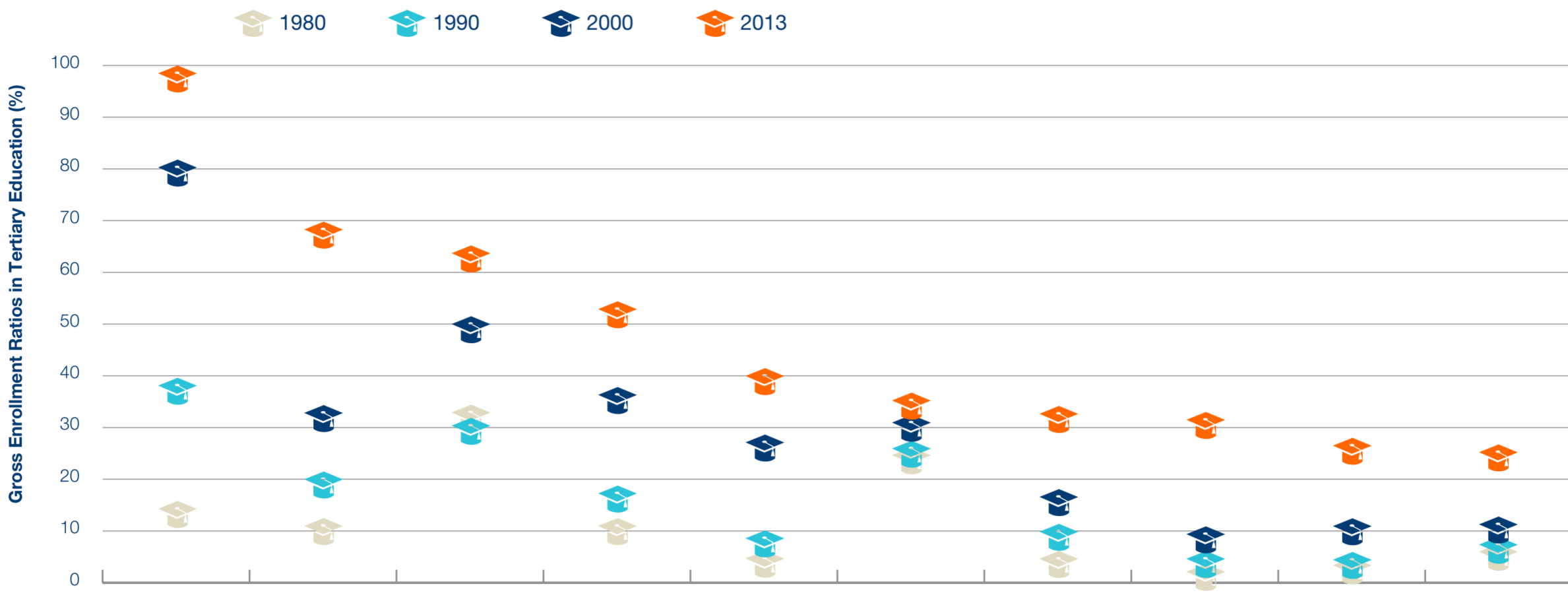
Are You Invested in Asia?

- Asia Education: Young, Bright, and Mobile
- Historical Strides in Tertiary Education
- Asian Student Academic Achievement
- Expanding Global Talent Pool: Pronounced Uptick in Asia's Footprint
- Emerging Asia Underpinning STEM Graduates
- Asia's Lofty University Ambitions
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Historical Strides in Tertiary Education

- The proportion of students in Asia earning their bachelor's degree has taken off over the last 30 years, with extraordinary numbers of students on a relative and absolute basis embarking on higher education throughout Asia.

Gross Enrollment Ratios in Asia Over Time



Source: World Bank (2016)

Asian Student Academic Achievement

- This monumental influx of students is driving top-ranking scores in international student assessment tests.

Top 10 Countries in Programme for International Assessment (PISA) Scores by Competency (2012)

| Rank | Country | "Mean Mathematics PISA Score" |
|------|-----------------|-------------------------------|
| 1 | Shanghai-China | 613 |
| 2 | Singapore | 573 |
| 3 | Hong Kong-China | 561 |
| 4 | Chinese Taipei | 560 |
| 5 | Korea | 554 |
| 6 | Macao-China | 538 |
| 7 | Japan | 536 |
| 8 | Liechtenstein | 535 |
| 9 | Switzerland | 531 |
| 10 | Netherlands | 523 |

| Rank | Country | "Mean Science PISA Score" |
|------|-----------------|---------------------------|
| 1 | Shanghai-China | 580 |
| 2 | Hong Kong-China | 555 |
| 3 | Singapore | 551 |
| 4 | Japan | 547 |
| 5 | Finland | 545 |
| 6 | Estonia | 541 |
| 7 | Korea | 538 |
| 8 | Vietnam | 528 |
| 9 | Poland | 526 |
| 10 | Canada | 525 |

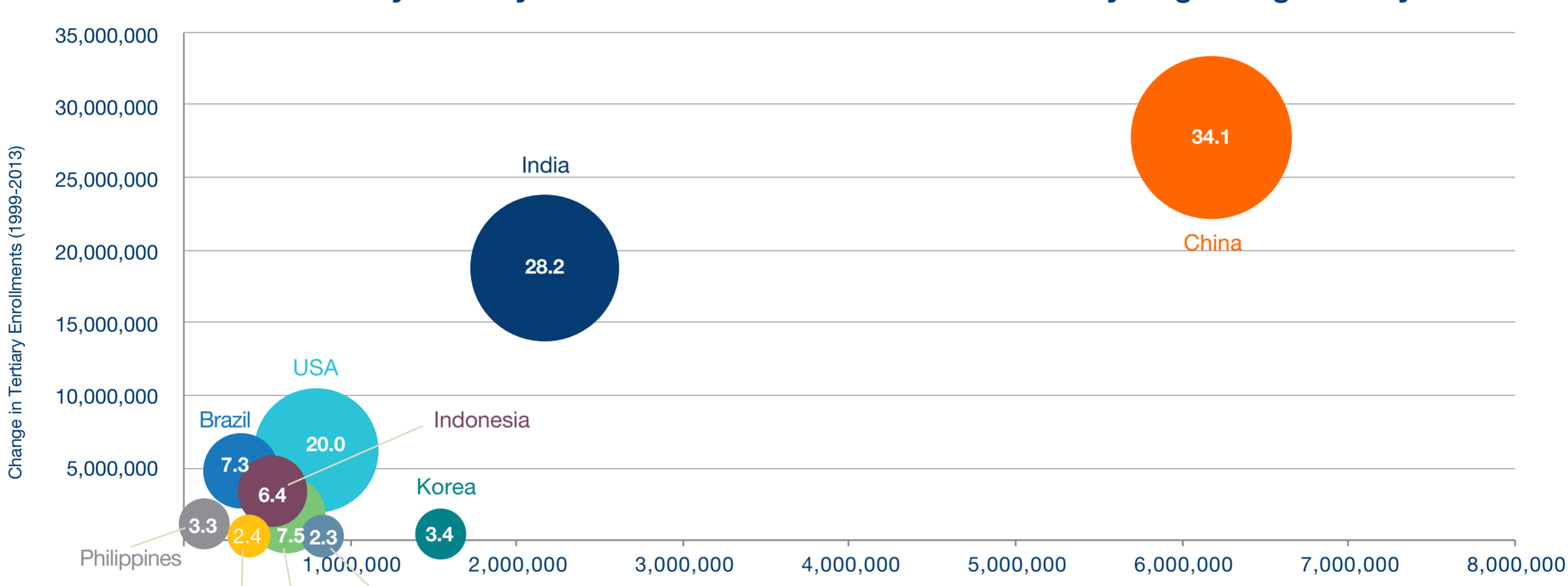
| Rank | Country | "Mean Reading PISA Score" |
|------|-----------------|---------------------------|
| 1 | Shanghai-China | 570 |
| 2 | Hong Kong-China | 545 |
| 3 | Singapore | 542 |
| 4 | Japan | 538 |
| 5 | Korea | 536 |
| 6 | Finland | 524 |
| 7 | Canada | 523 |
| 8 | Chinese Taipei | 523 |
| 9 | Ireland | 523 |
| 10 | Poland | 518 |

Source: PISA 2012 Results in Focus, OECD (Accessed 2016)

Expanding Global Talent Pool: Pronounced Uptick in Asia's Footprint

- Incredible numbers of students entering university in Asia and venturing abroad have been witnessed since the turn of the century, and this dynamic is set to continue in the decades ahead.

International Student Mobility: Tertiary Enrollment and Outbound Orientation by Originating Country



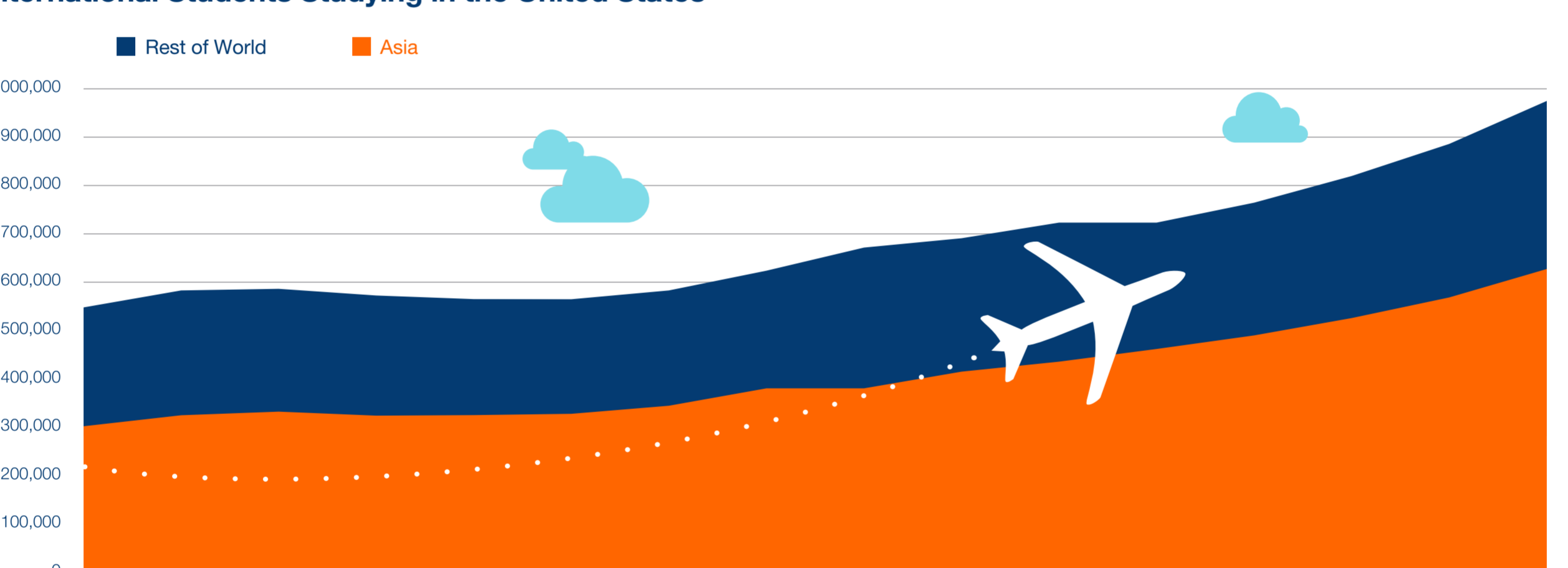
* Note: size of bubble denotes the number of tertiary degree students in millions

Source: UNESCO Institute of Statistics (2016)

Emerging Asia Underpinning STEM Graduates

- It is estimated that BRIC countries as a whole will produce around 75% of the global science, technology, engineering, and mathematics (STEM) graduates in OECD and G20 countries by 2030.¹
- China and India will make up more than 60% of the OECD and G20 STEM graduates alone.²
- Europe and the United States will account for only 8% and 4% of STEM graduates, respectively.³

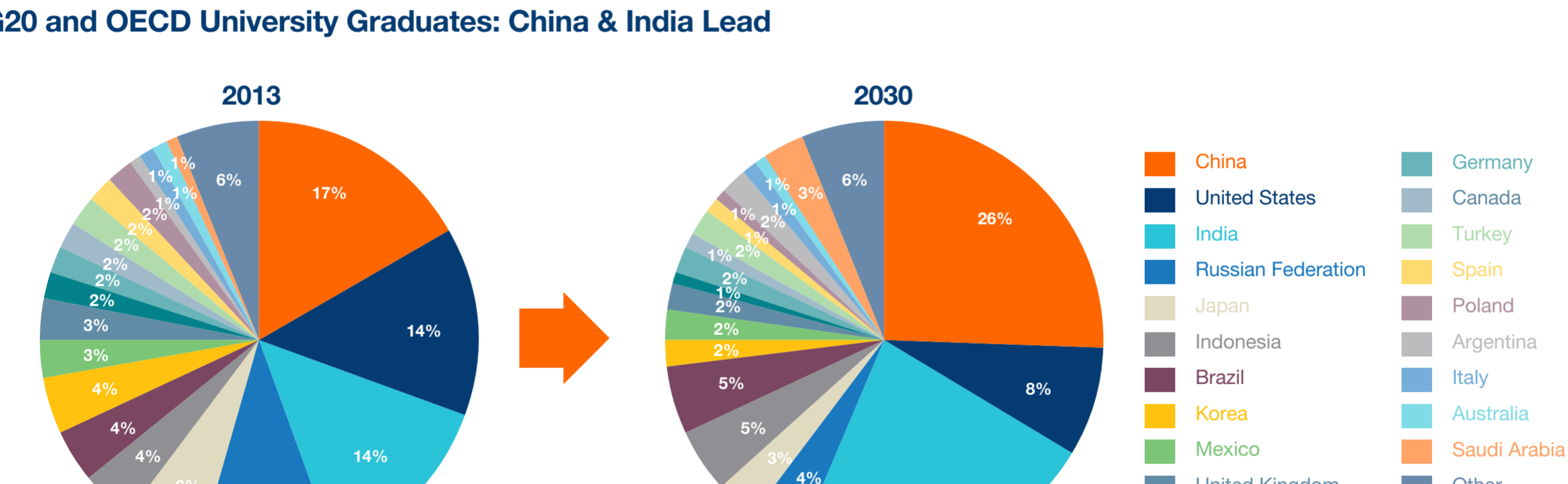
International Students Studying in the United States



Source: Institute of International Education (2016)

1, 2, 3: OECD, Education Indicators in Focus (April 2015)

G20 and OECD University Graduates: China & India Lead

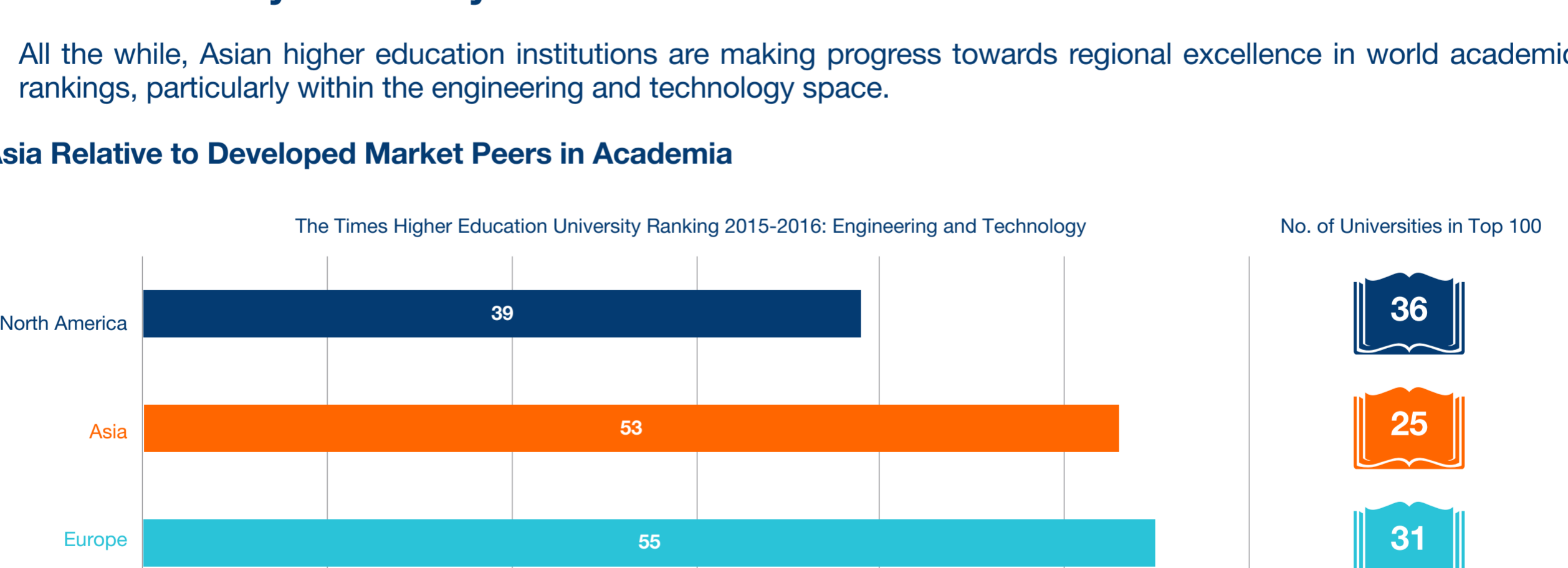


Source: OECD, UNESCO, National Statistics Databases (Accessed 2016)

Asia's Lofty University Ambitions

- All the while, Asian higher education institutions are making progress towards regional excellence in world academic rankings, particularly within the engineering and technology space.

Asia Relative to Developed Market Peers in Academia



Source: The Times 2015-2016 Education Ranking

Future Proofing for 21st Century Skills

- Improving education standards and a focus on STEM fields have altogether culminated into helping Asian countries future-proof their economies with a well-equipped workforce that can meet the in-demand skills of the 21st century.

2015 Most Demanded Skills on LinkedIn Globally

| Rank | Skill | Rank | Skill |
|------|---|------|---------------------------------------|
| 1 | Cloud & Distributed Computing | 11 | Data Engineering and Data Warehousing |
| 2 | Statistical Analysis and Data Mining | 12 | Algorithm Design |
| 3 | Marketing Campaign Management | 13 | Perl/Python/Ruby |
| 4 | SEO/SEM Marketing | 14 | Shell Scripting Languages |
| 5 | Middle/Low End Integration Software | 15 | Mac, Linux and Unix Systems |
| 6 | Mobile Development | 16 | Channel Marketing |
| 7 | Network and Information Security | 17 | Virtualization |
| 8 | Storage Systems and Management | 18 | Business Intelligence |
| 9 | Web Architecture and Development Frameworks | 19 | Java Development |
| 10 | User Interface Design | 20 | Electronic and Electrical Engineering |

* Note: orange indicates a STEM-related skill

Source: LinkedIn (2016)

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