

Improving SmallSat Economics Creates More Analytics Opportunities

EAS
ENVI ANALYTICS SYMPOSIUM

YORK SPACE SYSTEMS

Turnkey Satellite Manufacturer, Integrator & Service Provider

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Fast Company's 2018-19 Most Innovative - Space

01 SpaceX

For reducing the cost of reaching orbit

02 SpacePharma

For letting researchers do microgravity experiments

03 Blue Origin

For reimagining the manned space capsule

04 For All Moonkind

For galvanizing agencies to preserve moon artifacts

05 Made In Space

For manufacturing in orbit

06 Kepler Communications

For designing an in-space telecom network

07 Rocket Lab

For testing a new space-delivery system

08 Johns Hopkins Applied Physics Laboratory

For making the heat shields for NASA's mission to the sun

09 Planet Labs

For boosting agricultural output with satellite imagery

10 Stratolaunch Systems

For building the world's largest aircraft

01 Rocket Lab

For carrying small satellites into space

02 Virgin Galactic

For flying the first human space mission on American soil since the space shuttle retired

03 Spire Global

For developing maritime, aviation, and weather pattern analytics for NOAA and NASA

04 Icyeye

For launching low-orbit satellites to monitor the earth

05 Analytical Space

For firing into orbit a satellite capable of collecting data from other satellites

06 Relativity Space

For creating a 3-D printer for rockets

07 Audacy

For deploying the first FCC-approved inter-satellite data-relay network

08 Accion Systems

For making affordable satellite thrusters

09 SpacePharma

For experimenting with drug discovery via an unmanned mini-lab on the ISS

10 For All Moonkind

For putting historic moon artifacts and sites on the blockchain

Today's Journey

Investments in New Space are Increasing RS Data Volumes/Rates & Decreasing Costs



Launch



Sensor



Ground Operations



Data Storage & Management



AI/ML Processing

01100
10110
11110

Data & Information Services



Analytics



Today's investments are:

1. driving down costs orbit capabilities
2. improving ground game speed
3. AI/ML taking the man out of the loop
4. Analysts create better information, faster

-> **Exclusive RS data drives differentiation**

Top Challenges Analytics Companies Faces

- Automating analytics is hard
- Thin line between signal and noise
- Training data is expensive
- Limit talent base
- The more you sell, the less valuable it becomes...



Orbital Insight

Bloomberg



THE CLIMATE CORPORATION



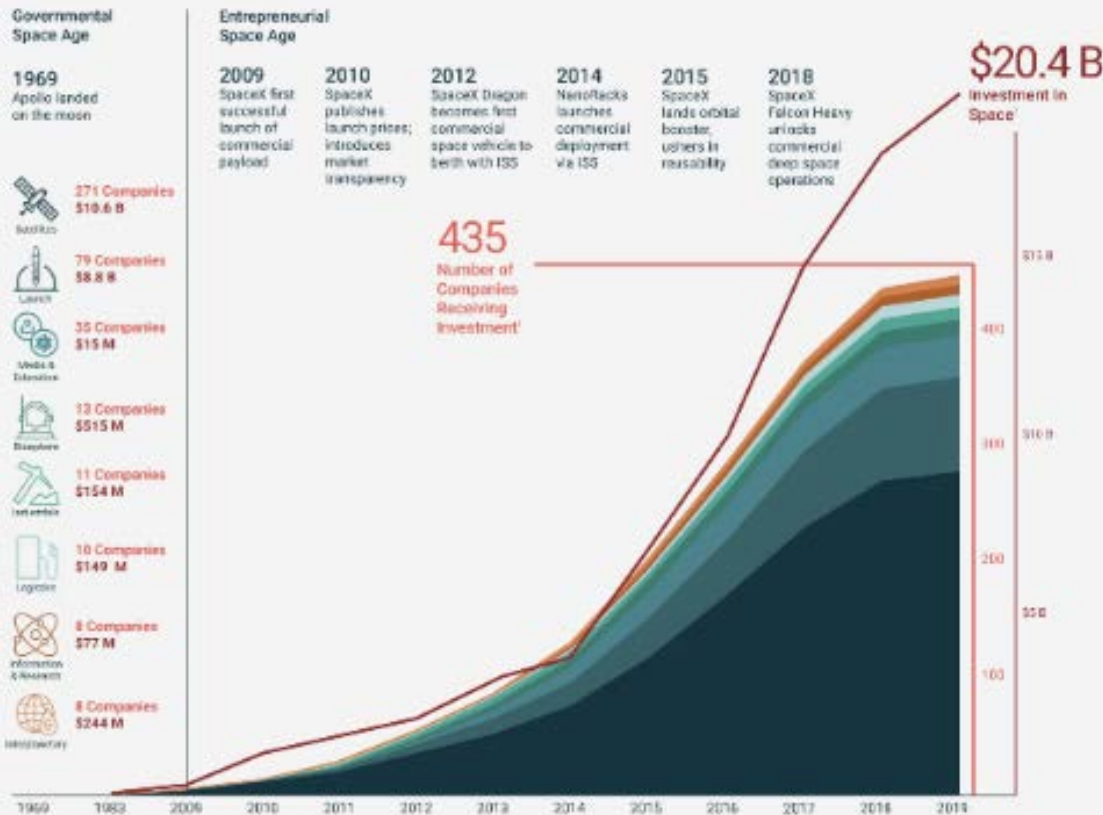
Descartes Labs

DigitalGlobe

BLACK|SKY

Q1'19 Investments

Cumulative Equity Investments From 2009 To Present



YEAR-TO-DATE EQUITY INVESTMENTS

NUMBER OF ROUNDS

29

EARLY-STAGE INVESTMENT

\$118M

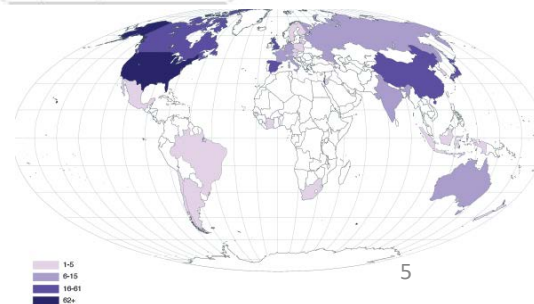
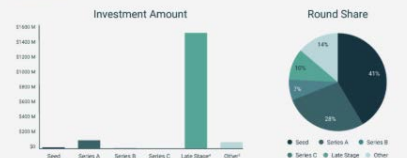
EARLY-STAGE ROUNDS

20

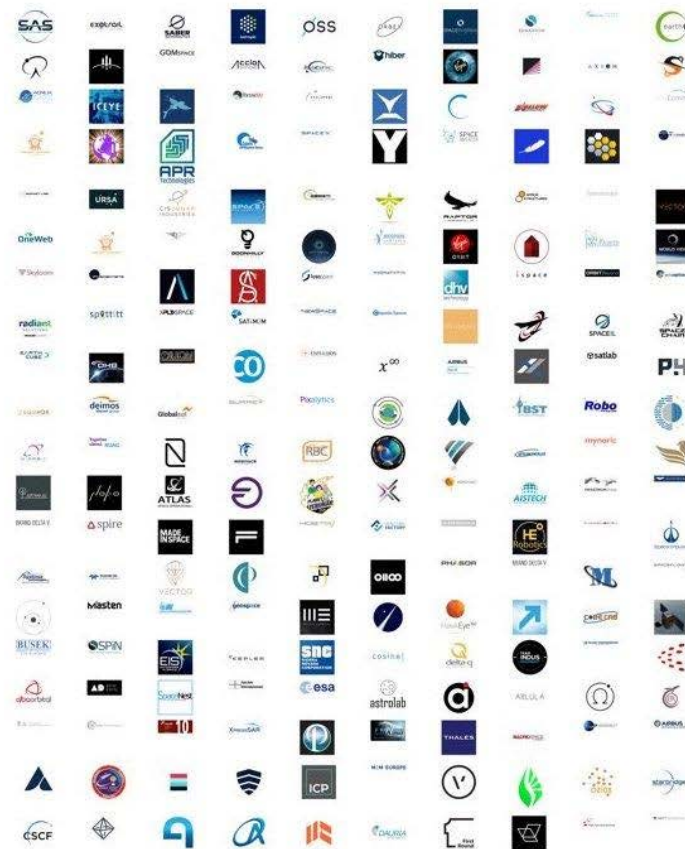
INVESTMENT AMOUNT

\$1,714,311,151

BY STAGE



Here is where the money is going...



Investment is creating disruption across ecosystem



Launch

Sensor

Ground
Operations

Data Storage &
Management

AI/ML
Processing

Data &
Information
Services

Analytics



01100
10110
11110



Price, Schedule & Performance Disruption

Notional SAR Mission: <50cm SAR, On orbit in 9 months + 1 yr Operational Cost



<\$10M



>\$1000M

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01100
10110
11110



Buy What you Want...not what you can get



**Now: a \$10-15M Satellite-based
Bespoke/Exclusive datasets now affordable**



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We Deliver...

