

4 May 2018

WiseTech Global Investor Day briefing materials

Presentation materials related to WiseTech Global briefings at the Technology, Product and Strategy Day held today are attached.

ENDS

About WiseTech Global

WiseTech Global is a leading developer and provider of software solutions to the logistics execution industry globally. Our customers include over 7,000 of the world's logistics companies across 130 countries, including 33 of the top 50 global third party logistics providers and 24 of the 25 largest global freight forwarders worldwide¹. Our flagship product, CargoWise One, forms an integral link in the global supply chain and executes over 44 billion data transactions annually. At WiseTech, we are relentless about innovation, adding more than 3,000 product enhancements to our global platform in the past five years while bringing meaningful continual improvement to the world's supply chains. Our breakthrough software solutions are renowned for their powerful productivity, extensive functionality, comprehensive integration, deep compliance capabilities, and truly global reach.

For more information on WiseTech Global and CargoWise One, please visit:

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¹ Armstrong & Associates: Top 50 Global Third Party Logistics Providers List, ranked by 2016 logistics gross revenue/turnover. Armstrong & Associates: Top 25 Global Freight Forwarders List, ranked by 2016 logistics gross revenue/turnover and freight forwarding volumes.

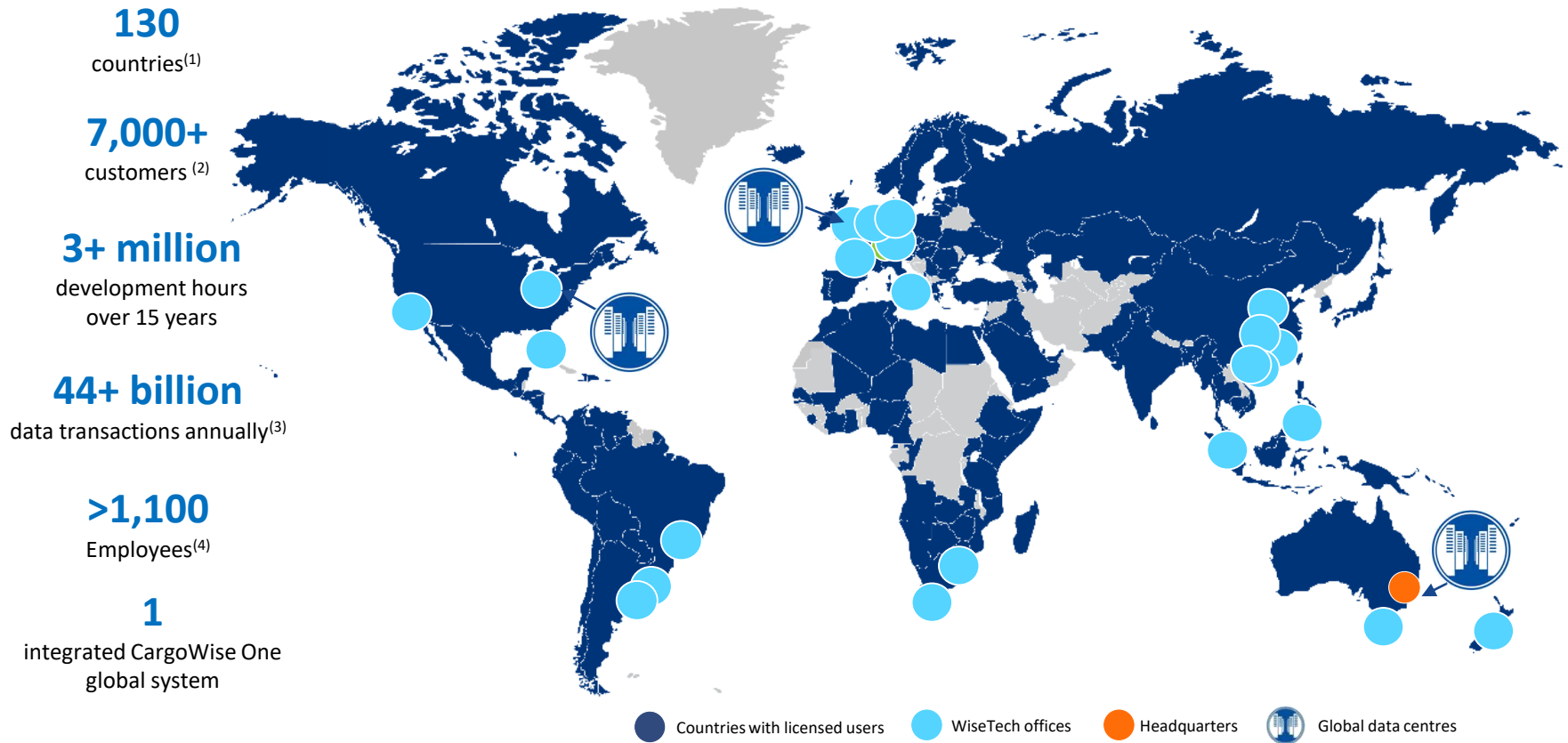
FIVE LEVERS OF GROWTH STRATEGY

WiseTech Global – Strategy and Technology
Founder & CEO, Richard White

Product, Technology and Strategy Day – 4 May 2018



A leading provider of software to the logistics industry globally



(1) Countries in which WiseTech software is licensed for use.

(2) Includes customers on the CargoWise One application suite and legacy platforms of acquired businesses; legacy customers may be counted with reference to installed sites.

(3) Data transactions for FY17, transactions measured at 30 June annually.

(4) Includes acquisitions announced to 23 April 2018

Global logistics industry and the competitive environment

What's ahead in 2018 and beyond

TECHNOLOGY

Fragmentation
Specialisation
Proliferation of micro point systems
'Sneakerware'
IOT
Aging legacy platforms dominate
Disparity of code/islands of data vs cloud/global access

COMMERCIAL IMPERATIVES

Exponential volume growth
Demand for faster throughput
Margin pressure
Capital constraints
Logistics high margin industry - for the successful few
Economic 'summer'

COMPETITION

Blurring of 1PL/2PL/3PL
Leaders pulling ahead
Deep systems capability driving value (not discounts)
Legacy platforms LPs ripe for acquisition

REGULATORY PRESSURE

Increasing regulation & complexity
Onerous penalties
Constant ongoing change (single window, system upgrades, Tariffs, Blocks, Trade Wars, Political change)
Digitisation slow to implement



Industry and competitive environment - WTC

What's ahead in 2018 and beyond

3PL industry in rapid evolution

- Consolidation continues, for 3PL and 2PL providers scale is key
- Increasing demand for integrated ecosystems to improve productivity and competitiveness
- Growing demand, few new commercial provider entrants of scale
- Borders blurring across the logistics industry
- 3PL e-commerce growth, growing 15%+ in key regions driven by consumer spending and increased cross-border purchasing requiring new solutions
- High growth in 3PL logistics, upcycle = stronger inertia around switching platforms

Governments

- Constant ongoing change centred around single window, system upgrades, border control or political change such as Brexit
- Increasing compliance fines to address risks, increasing regulation add-ons
- Digitisation is essential but implementation slow
- Supportive environment for software solution providers

E-commerce growth driver

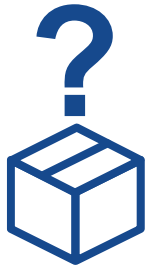
- E-commerce volumes are simultaneously pressuring and expanding 3PL businesses
- Increasing cross-border transactions to facilitate e-commerce
- E-commerce dismantling offline bricks and mortar, now impacting online retailers and potentially dis-intermediating wholesalers while both using, and competing with, 3PLs
- E-commerce giants becoming 3PL for their own operations and for third parties – strategy is build/buy and hoard
- E-commerce players expanding in significant ways into new markets

3PL revenues from e-commerce activity are growing faster than the overall 3PL market. 3PL e-commerce revenues are expected to generate a compound annual growth rate of 15.7% versus overall 3PL market growth of 6.0% for the period 2016 to 2020.

Armstrong & Associates 2017

Industry and competitive environment

Customers aligning on needs, clearer solution in sight



Needs of all logistics providers

Real-time visibility

Control over margins

Risk-free, cross-border execution

Faster multi-modal movement

More efficient use of resources

Error reduction



Solution in sight

Integration

Digitisation

Automation

Single source of truth, cleansed +
verified global data sets

Guided decision-making

Exception-driven intervention

Operating system for global logistics

Integrated modules covering key logistics transactions...



Freight forwarding



Customs clearance



Warehousing



Land transport



Liner & agency



Container station/yard



E-commerce



BorderWise



Geo compliance



Schedules



WiseRates



Booking



Tracking & events



Netting & reconciliation

Integrated modules for enterprise wide...



Accounting & invoicing



Customer relationship management



Workflow & automations



Integrated messaging



Document manager



Human capital management

Integrated Identity Management, Security and SSO

WiseTech difference, transformation track record

WiseTech
GLOBAL

WiseTech difference, transformation track record – *PRODUCT PLATFORM*

Expanding offshore requires bottom up global solution

Cannibalised AU business by building single source-code, global platform
Launched integrated regional platform: AU, NZ, UK, US, SG (2004)
Ultimately created the integrated global logistics execution platform (2014)

Focus on the hardest pain point (cross-border execution)

Freight forwarding + deep expertise in customs clearance + regulatory compliance

Build globally, configure locally

Developed specialised logistics accounting capability for each country of operation
Universal engines with local configurations

Scale requires uniformity, not more resources

Auto configuration: works 'out of the box'
Disciplined approach to product and platform, 'mass customisation'
Every feature available to all
Solve with technology, new architectures, engineered processes

Integration, not fragmentation

Data entered once, reused and visible across platform

WiseTech difference, transformation track record – *REVENUE*

Create pure recurring revenue

Early move to On-Demand licensing (2008)
 Transition existing OTL to On-Demand
 Launched transaction-based licensing – disciplined application (2014)
 Transition existing to pure Seat+ Transaction-based licensing

Create pricing simplicity

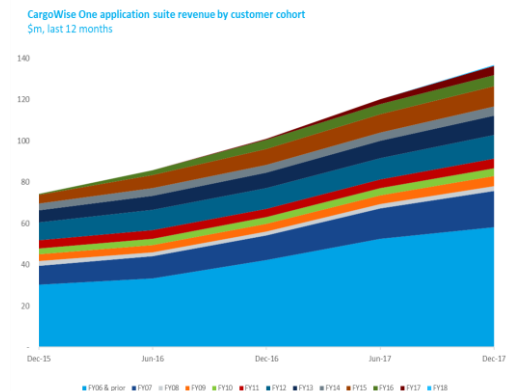
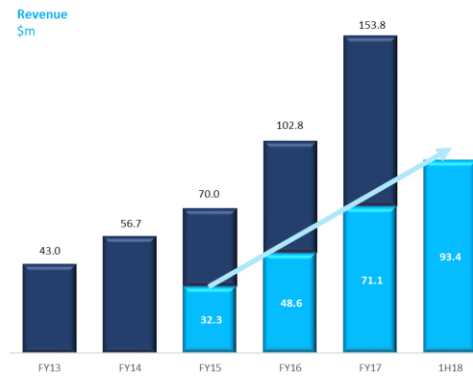
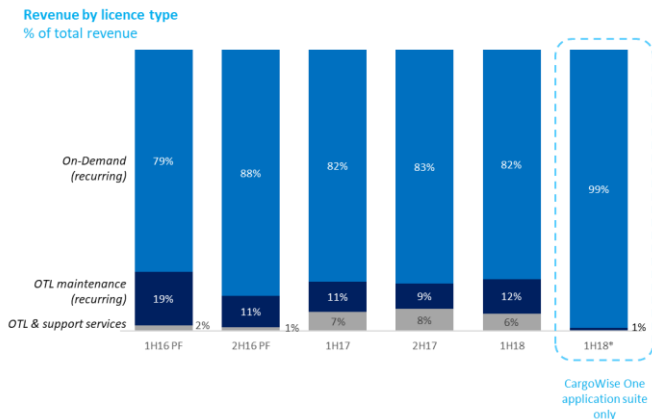
One standard price list, no need to negotiate

Behaviours drive revenue

Behavioural discounts: driving volume increases, prepayment, commitment, swift rollouts, module extension

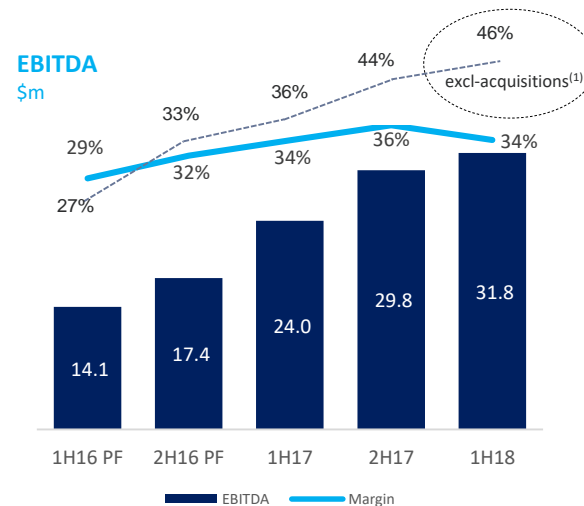
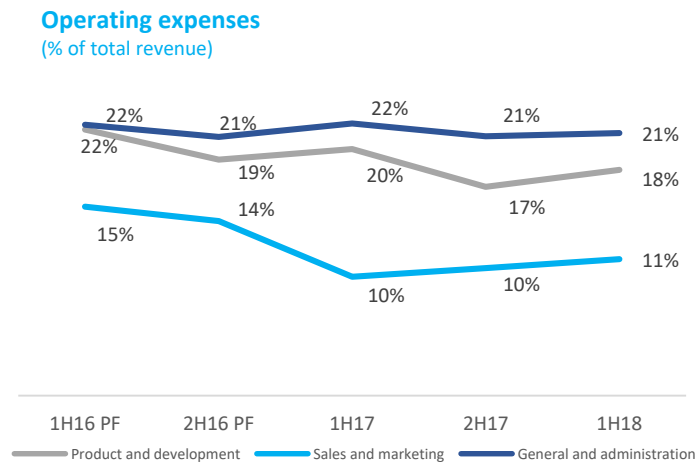
Data-led strategy

Pay attention to transaction revenue growth and customer attrition



WiseTech difference, transformation track record – *COST EFFICIENCY*

Build assets, not churn	Inversion of <i>product</i> spend vs usual sales & marketing – prioritise asset development
Eliminate costly bottlenecks to growth	Remove consulting: evolve to channel partner organisations Continuous rollout and expansion with no further sales effort – use and revenue grows as customers add transactions, modules, geographies and industry consolidation
Solution over service	Self on-boarding, workflow and configuration tools, channel partners, minimal WTC resources. Focus on 2 nd and 3 rd level helpdesks, customers establish and run 1st level helpdesks
Automation	Automated education: built 24/7 certification platform Automated training content platform: videos, use cases and ‘user-how-to’ guides Auto-billing platform, 130 countries, invoices issued monthly without manual intervention Automated software release + platform upgrade



1. Acquisitions are those businesses acquired since 2012 and not embedded into CargoWise One.

WiseTech difference, transformation track record – *TECHNOLOGY*

Innovation lead + fast follower

Early deployment 2011 to full cloud – customers transition over 2 years
Establish data centres worldwide
Built “High Volume Low Value” capability 2006, launched e-commerce 2013

Architectures and engines over ‘sweatshops’

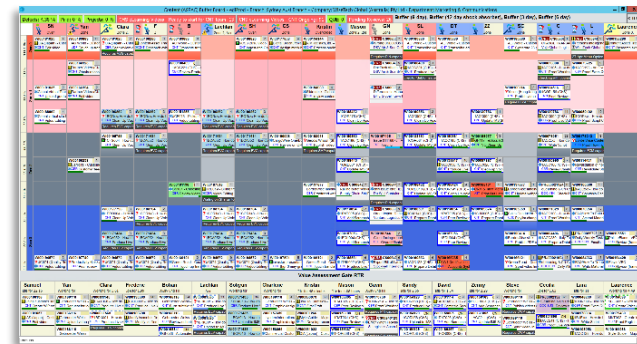
2012, GLOW ‘build once architecture’, evolve to build software, minimal coder involvement
2013, built PAVE, since applied across global dev workforce – decimated defect rates, exponential growth in development productivity, 500+ new product enhancements annually
Built Universal Customs Engine – allow local customs builds in fraction of time
Exceptional speed to market – swift delivery of regulatory changes and new products

Productivity at the centre of everything – ‘use not users’

Launched deeply integrated CW1 global platform, high productivity tooling
Workflow automation engine – transactions configured to flow from events
Introduce exception-based execution on CW1

Leverage global data sets, transaction sets, new technologies

Built global data sets – cleansed and verified
Utilising machine learning, NLP, guided decision making, to maximise the benefit of our vast data lakes and global transaction sets
Investigating myriad new technologies for logistics and CW1



Operating system for global logistics 2004

Integrated modules covering key logistics transactions...



Freight forwarding



Customs clearance



Warehousing



Container station/yard



Track, trace & manage

Integrated modules for enterprise wide...



Accounting & invoicing



Document manager

Integrated Identity Management, Security and SSO

Operating system for global logistics 2014

Integrated modules covering key logistics transactions...



Freight forwarding



Customs clearance



Warehousing



Land transport



Liner & agency



Container station/yard



Geo compliance



Tracking & events

Integrated modules for enterprise wide...



Accounting & invoicing



Customer relationship management



Workflow & automations



Integrated messaging



Document manager



Human capital management

Integrated Identity Management, Security and SSO

Powerful high growth engine – CargoWise One integrated global platform

Strong foundation for future technology, seamless rollout, scalable capacity, global solutions

CargoWise One



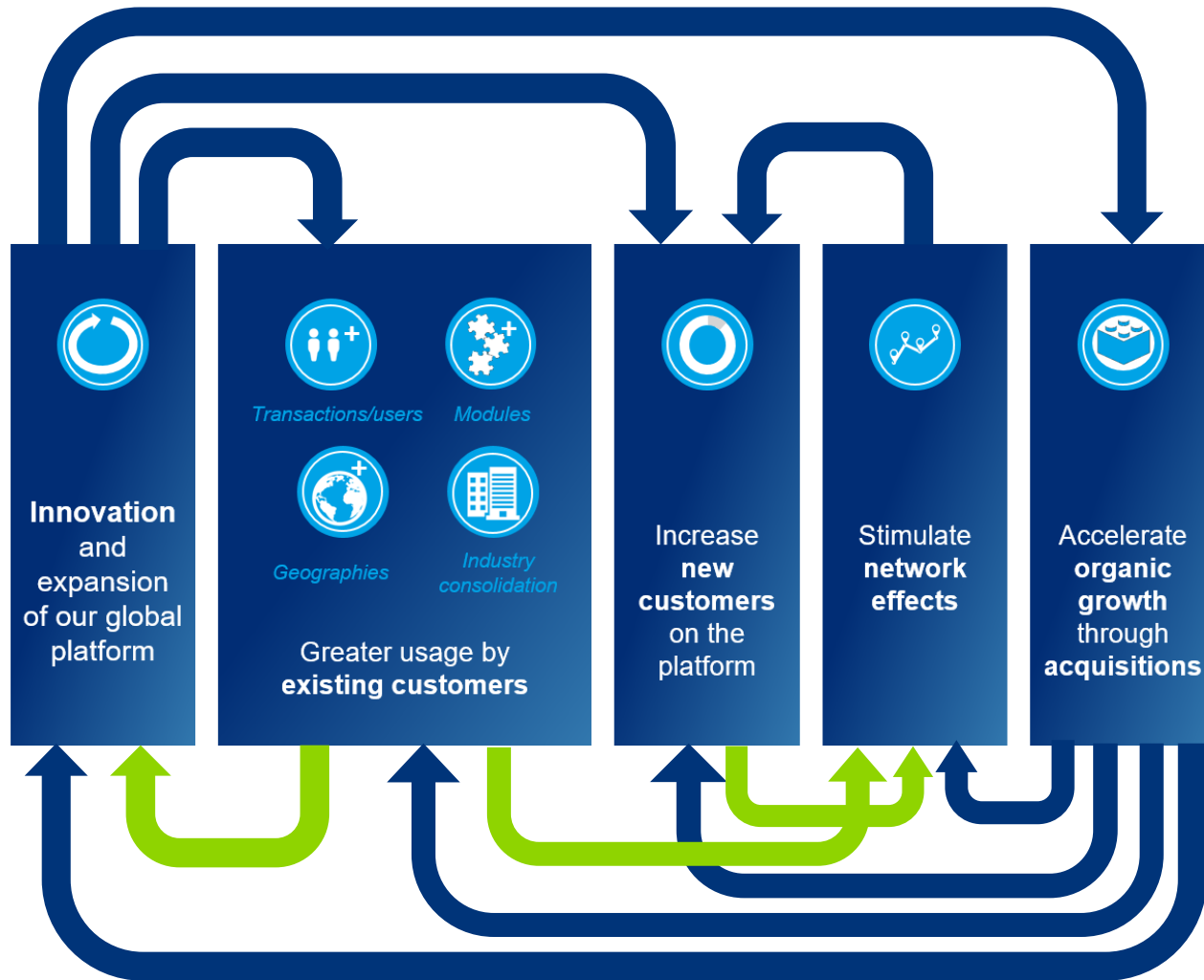
- ✓ scalable to any size of business
- ✓ global reach – 130 countries
- ✓ deeply integrated with real time visibility
- ✓ reduces risks, costs and data entry
- ✓ detailed compliance
- ✓ 30 languages
- ✓ data entered only once
- ✓ automations and delegations
- ✓ built-in productivity tools
- ✓ on-demand/transaction-based licensing
- ✓ global data sets and execution engines
- ✓ swift on-boarding, efficient sales process
- ✓ open-access
- ✓ available anywhere, anytime

Relentless platform expansion with over 500 enhancements annually

Our five levers of growth

Focus into 2019 – each action expands and accelerates our growth

Innovation & expansion through acquisitions drive new users, greater usage & network effect



Accelerating organic growth through innovation and acquisitions

innovation

Truly global solution

- Global integrated CW1 500+ enhancement annually
- Global freight forwarding
- Global customs
- Global data sets
- Global rates
- Global schedules
- Global bookings
- Global tracking & events
- Global invoicing
- Global e-commerce
- Cloud, on-demand, all devices

Fast adoption

- Transaction growth
- Increasing inbound queries
- Development partner requests
- New ecosystem participants

expansion

Geographic expansion

- Zsoft
- Compu-Clearing
- Core Freight
- znet
- ACO
- Intris
- Prolink
- Bysoft
- ABM Data Systems
- CustomsMatters
- EasyLog
- Forward
- Softcargo

Adjacencies

- Cargoguide
- CargoSphere
- Micrologistics
- Digerati
- TradeFox
- CMS Transport

Increasing inbound queries

- Existing customers reactions

- Increasing awareness of WTC progress on global solution for borders

Acquiring businesses for geographic expansion – solving buy or build?

Small targeted acquisitions in key regions provide safer, faster, stronger entry to new markets

We buy into market positions that would take years to build, integrate swiftly, and drive value across platform

Why buy, not build?

Seamless entry into new markets with:

- Industry experts
- Local leadership
- Quality customer base
- Local infrastructure and offices

Risk reduction

- Known entry cost
- Earnouts help retain mgmt
- Addresses war for talent

Accelerates expansion

- Move rapidly with certainty
- Targeting manufactured trade flows – high growth



Rapid expansion since January 2017:

11 customs focused acquisitions

Delivering strong positions in:

- Belgium
- Brazil
- France
- Germany
- Ireland (2)
- Italy
- Taiwan, China
- 16 countries across Latin America

Added ~250 talented industry experts and developers

Integrate product immediately – embed new product over time, utilising Universal Customs Engine

Integration scalable

Upfront cost of only ~\$57m plus earnouts in future years

Adjacencies feed into our innovation pipeline to build ecosystems

Targeting key plug-ins to our global development or multi-regional adjacencies that can scale

We are **accelerating convergence of technologies** by adding targeted acquisition of key adjacencies to our innovation pipeline to build valuable ecosystems and global product sets.

1H18 acquisitions focus on expanding TAM in ocean, air, land transport, warehousing and data provision

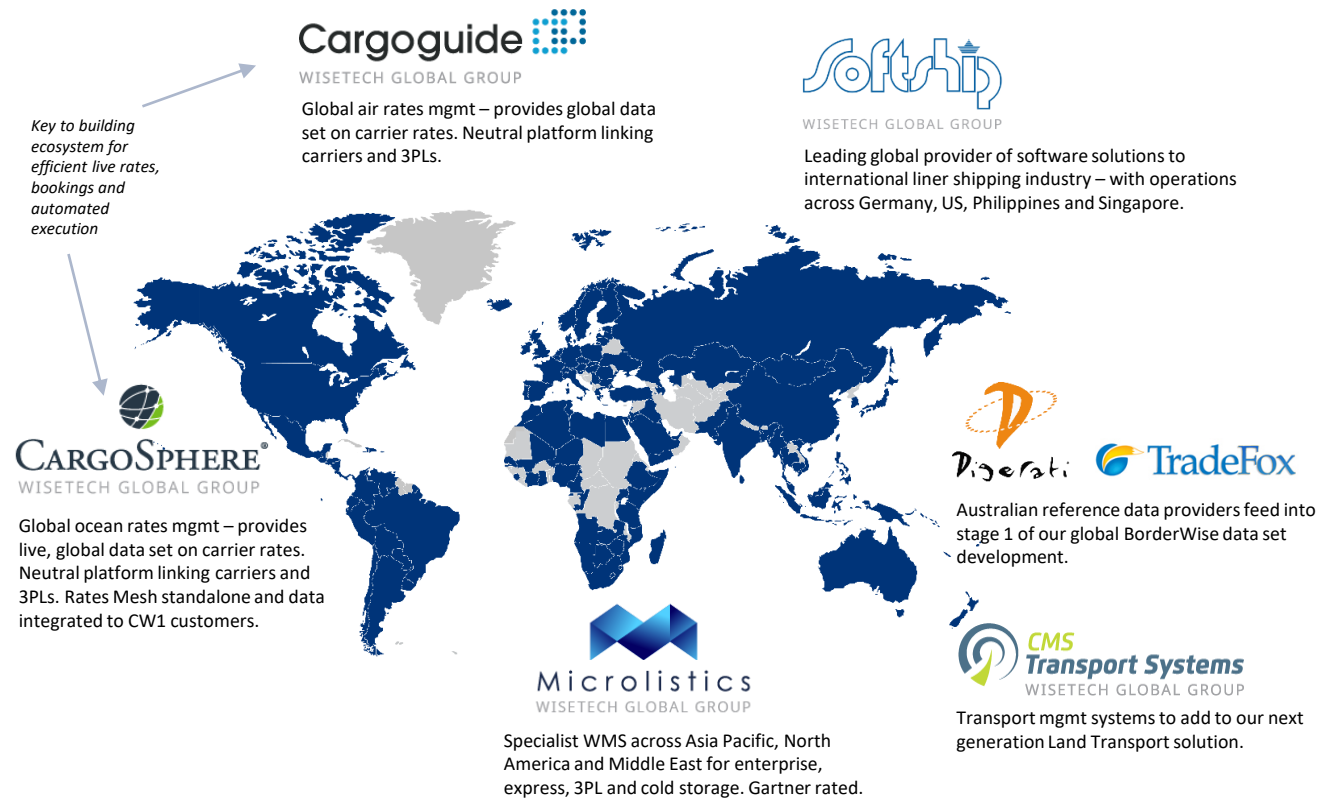
We look for adjacencies that we can scale from domestic multi-region to global product capability, and either:

1. Provide a core element for key ecosystem development; or
2. Expand our next generation development of existing CW1 modules; or
3. Feed into global data set for machine learning and automation

Since 2017, we've added **~200** talented industry experts and developers

Integrate or embed is bespoke to the adjacency

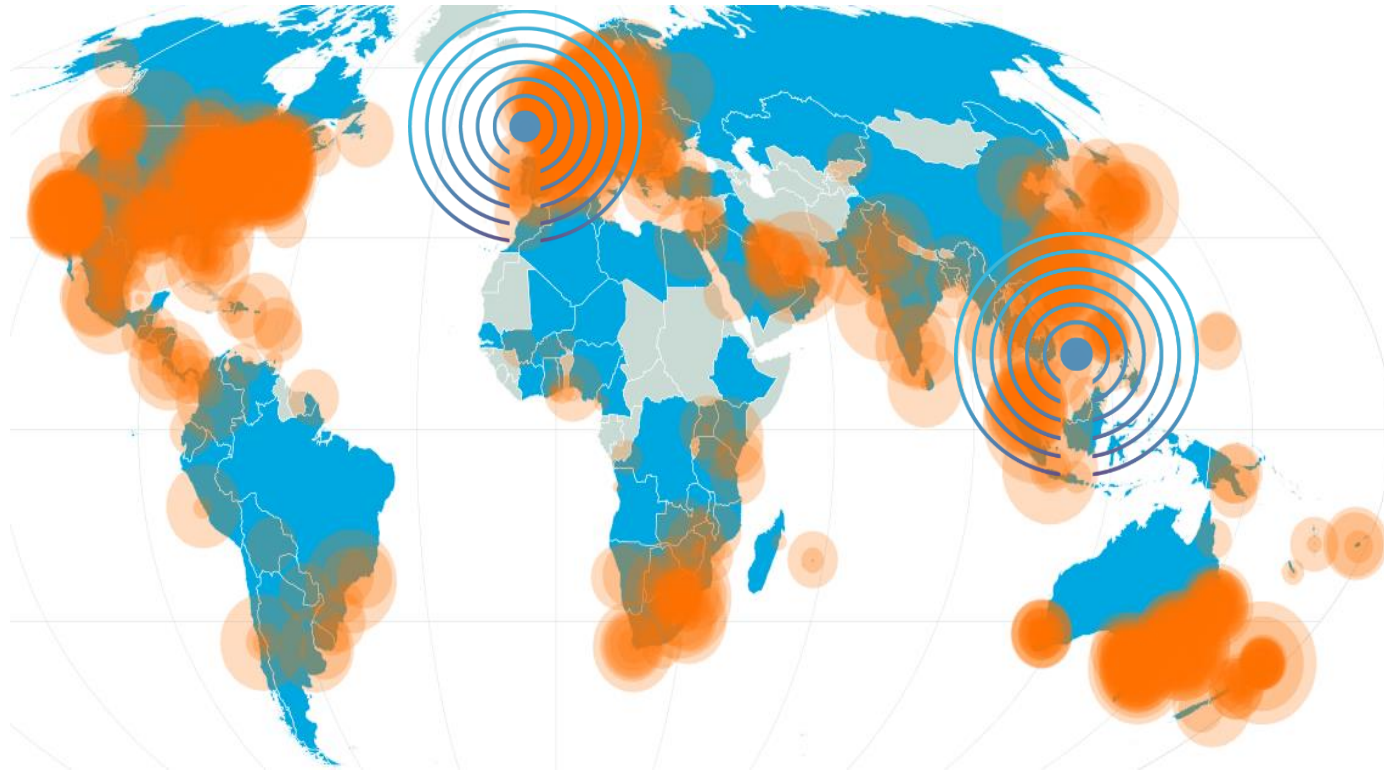
Upfront cost of **~\$72m** plus earnouts in future years



Acquiring businesses to accelerate organic growth

Acquisitions focus on manufactured goods trade flows or technology adjacencies

Geographically we are following the G20 *plus* 20 assessed on manufactured goods trade flows
Significant progress made with 23 countries acquired since January 2017
Now covering 30 countries in total for customs processing



What we target

- Strongly entrenched solution providers in non-English speaking markets with complex cross-border compliance requirements
- New geographies focused on manufactured goods trade flows (not GDP)
- New, complex, adjacent competencies to plug-in to our global development or multi-regional adjacencies that can scale to global

Accelerating organic growth – our M&A machine

Internal M&A capacity

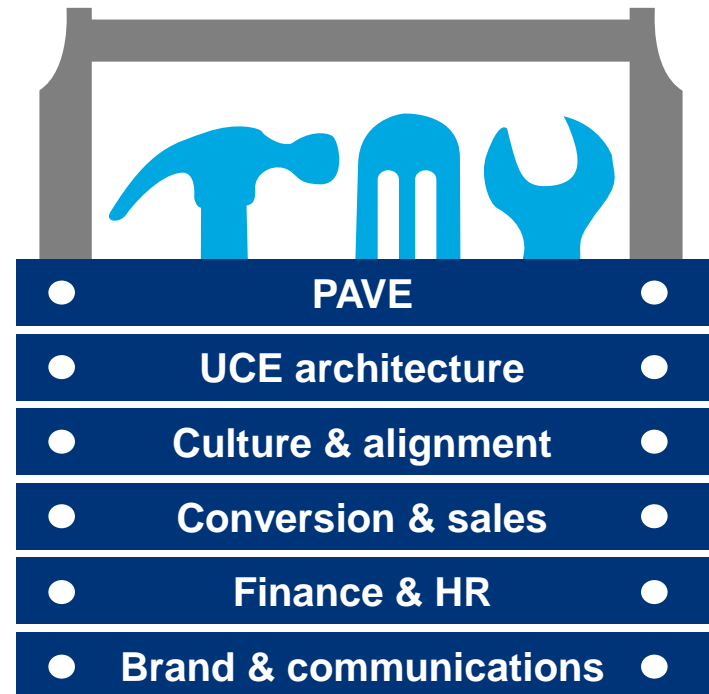
- Origination
- Due diligence (*ex. local tax, in-country legals*)
- Completion execution
- Integration
- Embedding
- Customer transition

Source and buy assets that are not for sale

Cultural fit is key

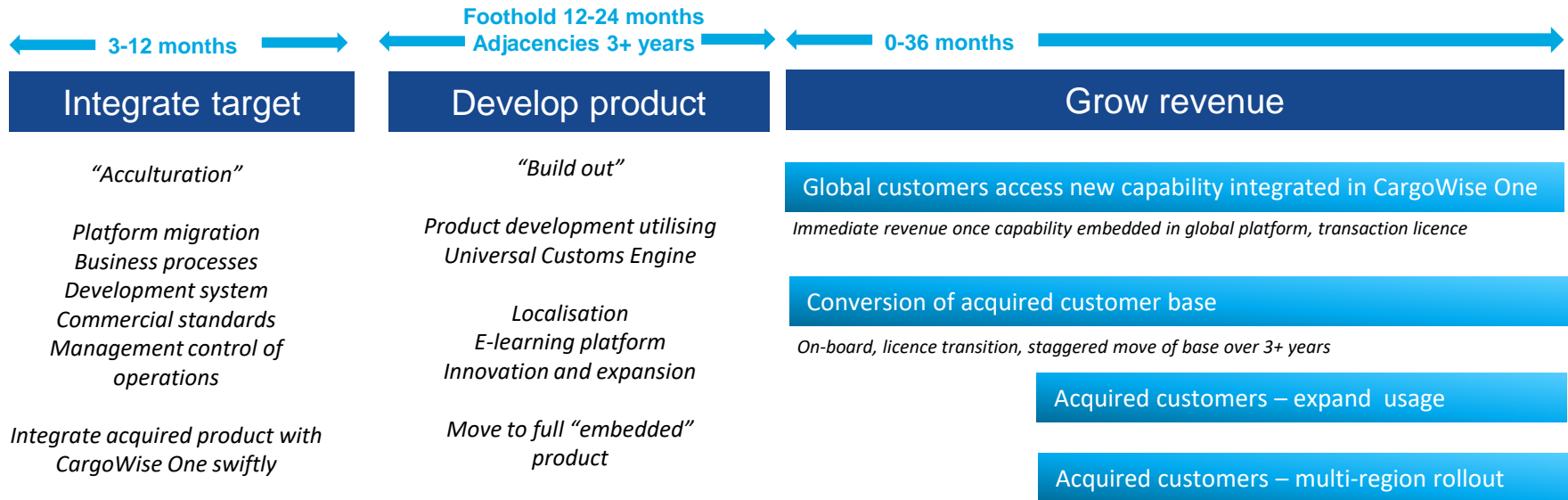
Self-integrating acquisitions allows for rapid scale

WTC architectures PLUS integration milestone kits



Acquisition – integration process + value components

Stage 1 integration completed swiftly, we focus on long-term product capability and growing revenue



Acquisition and integration value components



Acquisitions accelerate organic growth

China expansion: case study – key foundation within region

- Organic entry accelerated with Zsoft acquisition
- Operations cover development, sales, support and content
- Servicing global 3PLs in China and commencing CW1 sales locally
- China foundation now established for rapid Asia expansion



Laying the foundation

- 2008: international customers first take us to China
- 2013-4: Nanjing Software Development Centre
- 2015 Zsoft (FF) acquisition and integration of Shanghai, Shenzhen, Guangzhou
- 2016 rebrand, build translation teams for e-learning, sales/marketing content
- 2017 commence China customs development, establish WisePartner
- FY18 acquire ProLink, sign leading Taiwan FF on CW1
- 2018 complete contract mechanism, simplified Chinese e-learning, collateral, website, customer portal, recruit further WisePartners
- 2H18 begin major sales drive for key customer segments
- Foundation work in China = solid base for rapid expansion to Hong Kong + Taiwan
- ~ 165 staff incl 55 developers across China +Taiwan – active CW1 further development
- 2H18 Japan office opened



Significant opportunity

- Largest export market globally
- ~5,500 NVOCCs
- ~41,000 freight forwarders and agents
- ~5,000 govt registered Class A forwarders
- 700,000 logistics service providers, +15% pa
- Top 100 FF median revenue ~USD160m

Key customer streams

1. Global/regional 3PLs and FF operating in China
2. Large Chinese co. globalising
3. Larger Chinese-based organisations
4. Transition of relevant Zsoft customers

(NB: revenue appears in Existing/New/Acquisitions)

DSV

Yusen Logistics

TOLL

GEODIS

JAS
FORWARDING WORLDWIDE

DHL

WiseTech 慧咨
GLOBAL 环球

Innovation investment

Significant pipeline of longer-term innovations across existing verticals and new adjacencies

~600

product upgrades and enhancements annually

37%

of revenue invested in 1H18

50%

of employees focus on innovation and product development

>670,000

unit tests executed every 45 mins

>\$200m

invested FY14-FY18F

Major development focus on:

- Productivity
- Global data sets
- Machine learning
- Natural language processing
- Guided decision making
- Global automations
- HVLV logistics (e-tail)
- Regulatory environment changes

Over 3,000 product upgrades and enhancements added to the global platform over last 5 years

Our FY18 commitment: >\$65m in innovation and development

Work faster, harder, smarter

PAVE

- Productivity Acceleration Visualisation Engine

GLOW

- 'Build once' architecture and 'coding without coders'

Universal Customs Engine

- Accelerating complex customs localisations

Reduce cost, time, error, risk

WiseRates

- Global data sets
- Real-time access
- Immediate booking

Global Tracking

- Global air/ocean schedules, container and air waybill tracking

BorderWise

- Risk reduction
- Due diligence
- Cost efficiency

Supply chain behavioural change

GEOCODE

- Global address cleansing
- Geocoding
- Master data de-duplication

Global data sets

- Multi-modal rates, schedules, bookings
- Compliance data
- 3PL supply chain

Machine learning

- Process automation
- Guided decision making
- Natural language processing

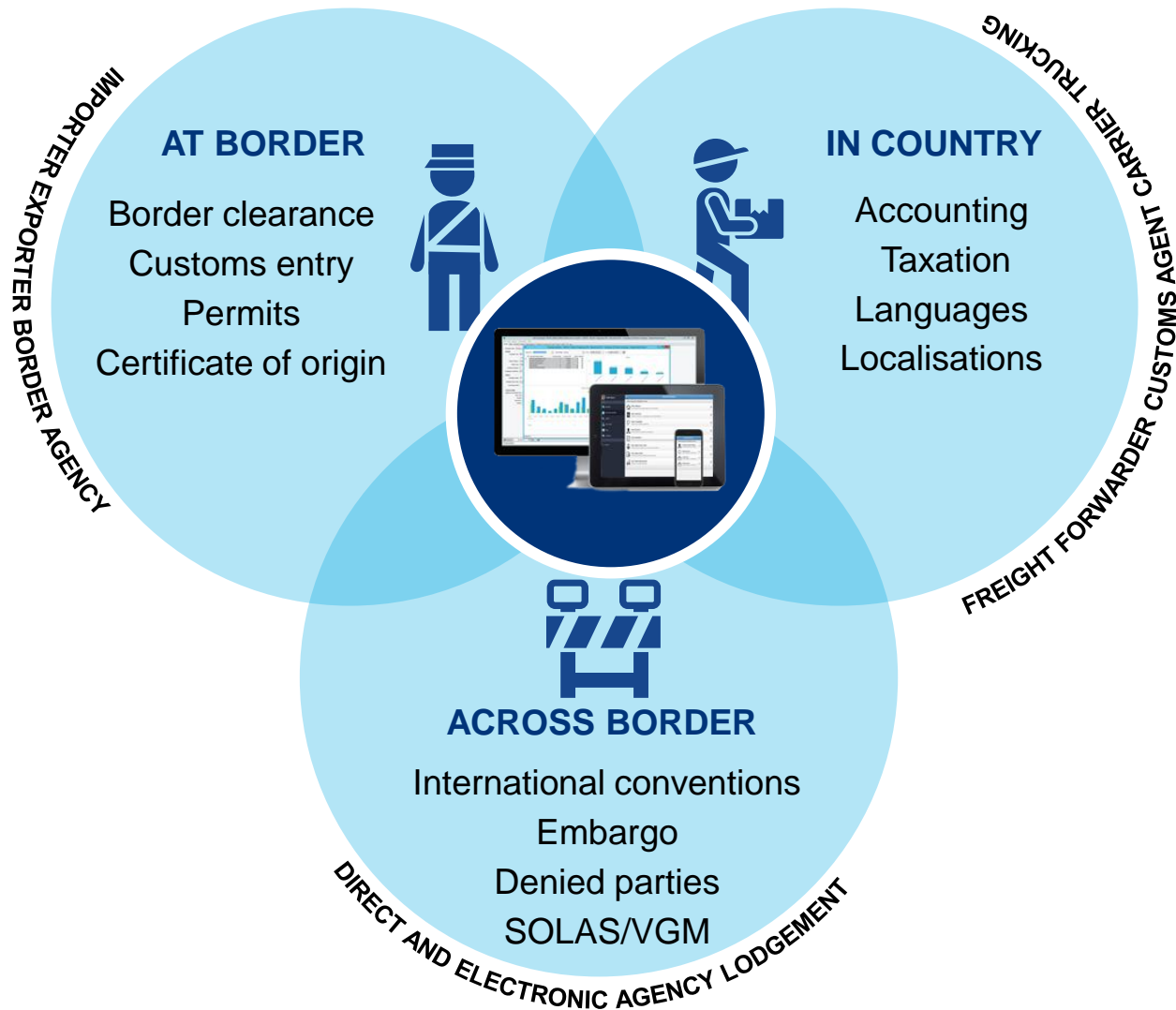
Cargo chain – building an ecosystem



Needs of all logistics providers

- ✓ Real time visibility
- ✓ Control over margins
- ✓ Faster multi-modal movement
- ✓ More efficient use of resources
- ✓ Error reduction

Trade and border compliance ecosystem – pain points abound



Needs of all logistics providers

- ✓ Control over margins
- ✓ Risk-free, cross-border execution
- ✓ Faster multi-modal movement
- ✓ More efficient use of resources
- ✓ Error reduction

E-commerce volumes and speed demand 'light touch' execution

Border management + compliance risks are the largest pain-point of international logistics and e-commerce

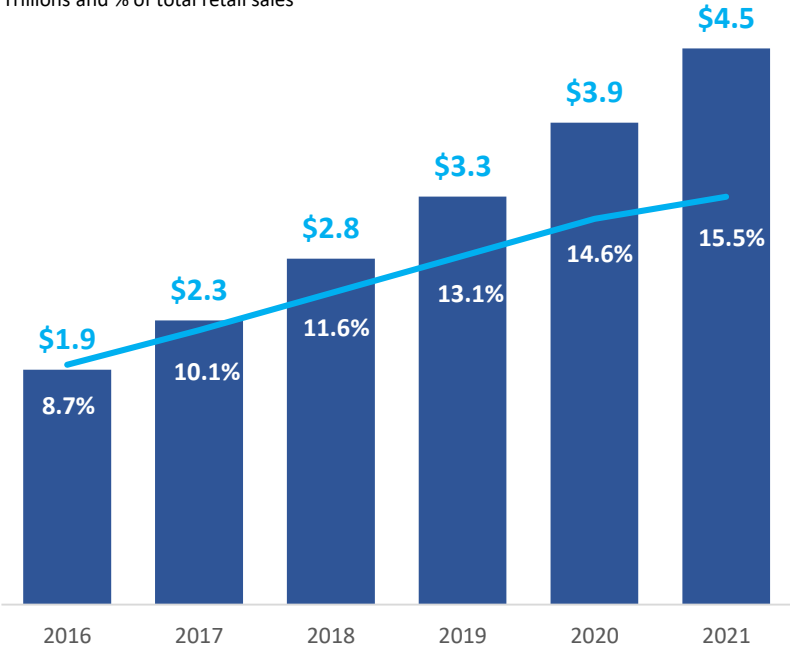
What challenges do you face with your cross-border e-commerce (other than cost)?



Source: EFT report – Supply Chain Hot Trends 2018 Q1&Q2

Retail e-commerce sales worldwide, 2016-2021

Trillions and % of total retail sales



Source: eMarketer June 2017

“By 2020, an estimated 45 percent of online shoppers will purchase goods from other countries, which represents a four-fold increase in the value of cross-border sales since 2014.”

Colliers International 'supply chain disruptors' 2017

E-commerce 2nd generation, 'High Volume Low Value'

Providing scalable, high volume integrated solution for 3PLs facing e-commerce juggernaut

International e-commerce solution designed for higher volume levels

Country agnostic – founded on the global customs strategy

Designed for seamless rollout to CW1 customers and into their partner warehouses

Web-enabled, multi-user interface, multiple devices

Global rollout expected FY19

- Fully integrated, highly scalable, cross border solution for HVLV packages
- Next generation to our existing e-commerce product (AU)
- Full integration between freight forwarding, customs brokerage, warehousing, last-mile carrier management and online tracking
- Transaction-based licencing, cloud-enabled
- Immediate customer base from our existing e-commerce customers
- Currently in prototype test with development partner, then roll out to existing AU & NZ customers.
- Phase 1 launch complete FY18 with destination depot. Phase 2 origin warehousing, courier integration and automations in FY19.



Opportunity + 2019

WiseTech
GLOBAL

Opportunity

Logistics market size: across 1PL, 2PL, 3PL = ~A\$14trillion

Global 3PL

- Top 150
- LP in each vertical and each domestic market

E-commerce

- 3PLs
- Express couriers
- E-commerce giants
- Postal services

Government

- Regulation
 - Digitisation
 - Integration
- Domestic regulators
Global regulators
Industry bodies

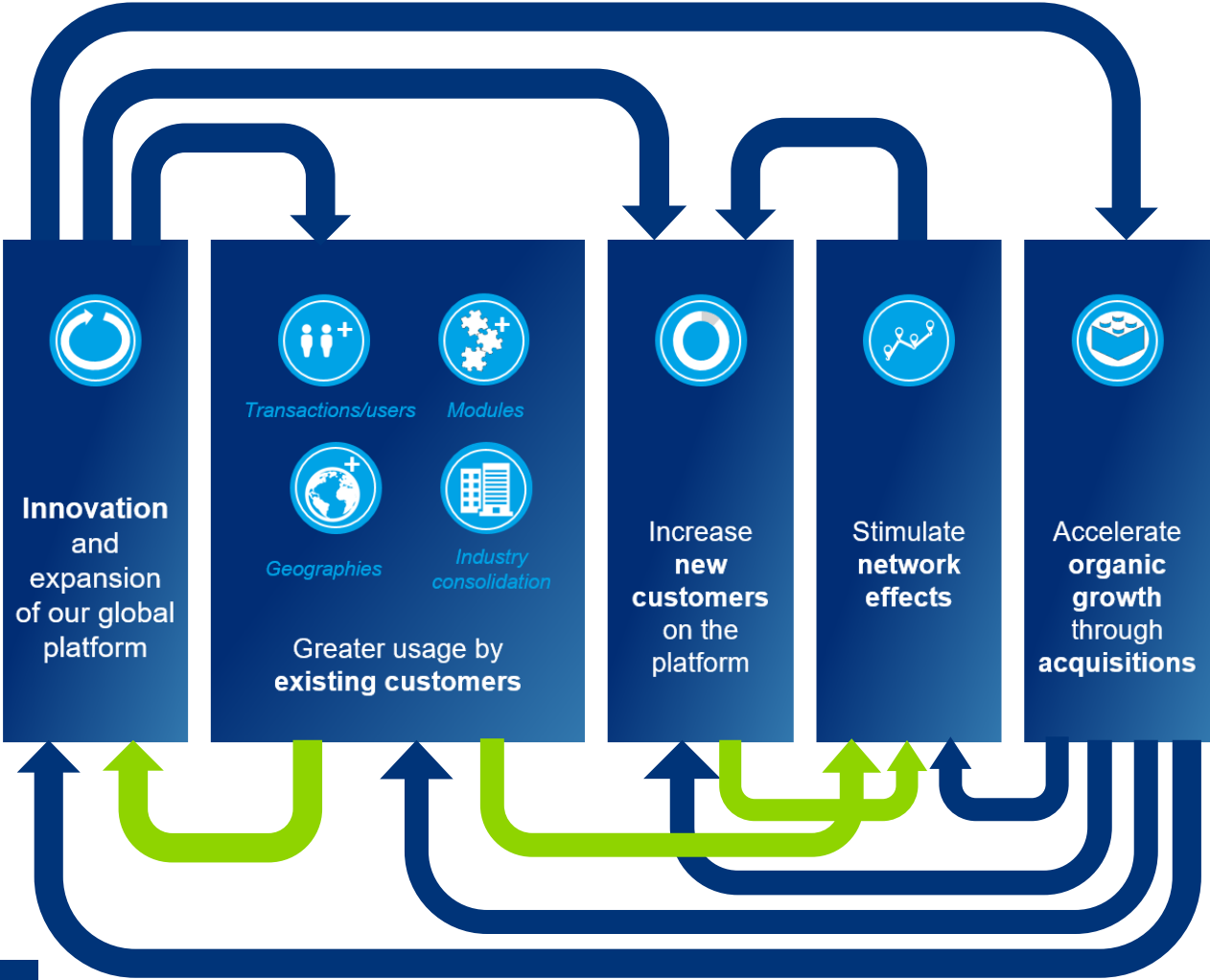
Ecosystems

Ecosystems, once built, drive long term value that is near impossible to dislodge

*Some of our products and innovations also apply to non-logistics markets
eg: PAVE (all industries) and GLOW (software development)*

Focus into 2019

Consistent and disciplined execution of our 5 levers of growth



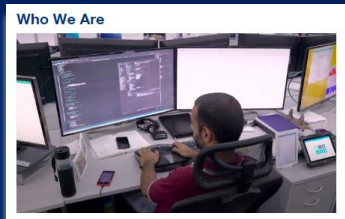
Action drives customer

Customer drives action

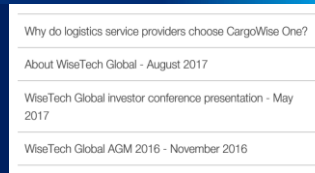
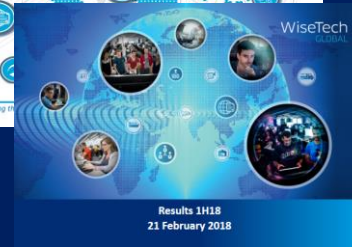
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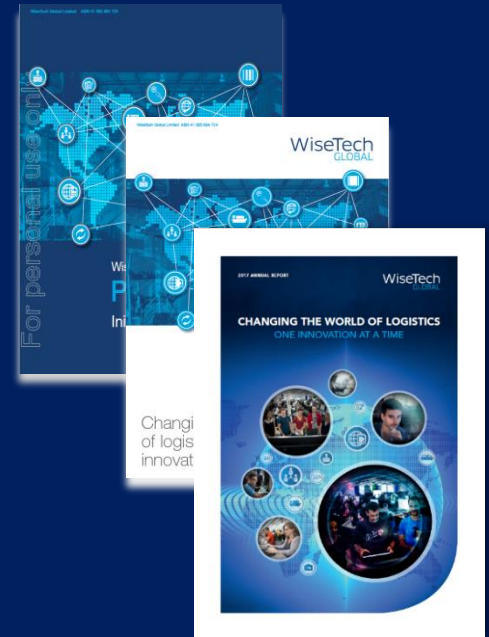
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PRESENTATION OF INFORMATION

- **Prior period pro forma (PF)** Except where explicitly stated, the financial data prior to FY17 in this presentation is provided on a pro forma basis. Information on the specific pro forma adjustments is included in the Appendix to the 1H18 Results investor presentation dated 21 February 2018.
- **Current period statutory** The financial data for 1H18 in this presentation is provided on a statutory basis but in a non-statutory presentation format.
- **Currency** All amounts in this presentation are in Australian dollars unless otherwise stated.
- **FY** refers to the full year to 30 June, 1H refers to the six months to 31 December and 2H refers to the six months to 30 June.
- **Rounding** Amounts in this document have been rounded to the nearest \$0.1m. Any differences between this document and the accompanying financial statements are due to rounding.

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WiseTech
GLOBAL

INNOVATION AND EXPANSION OF OUR GLOBAL PLATFORM

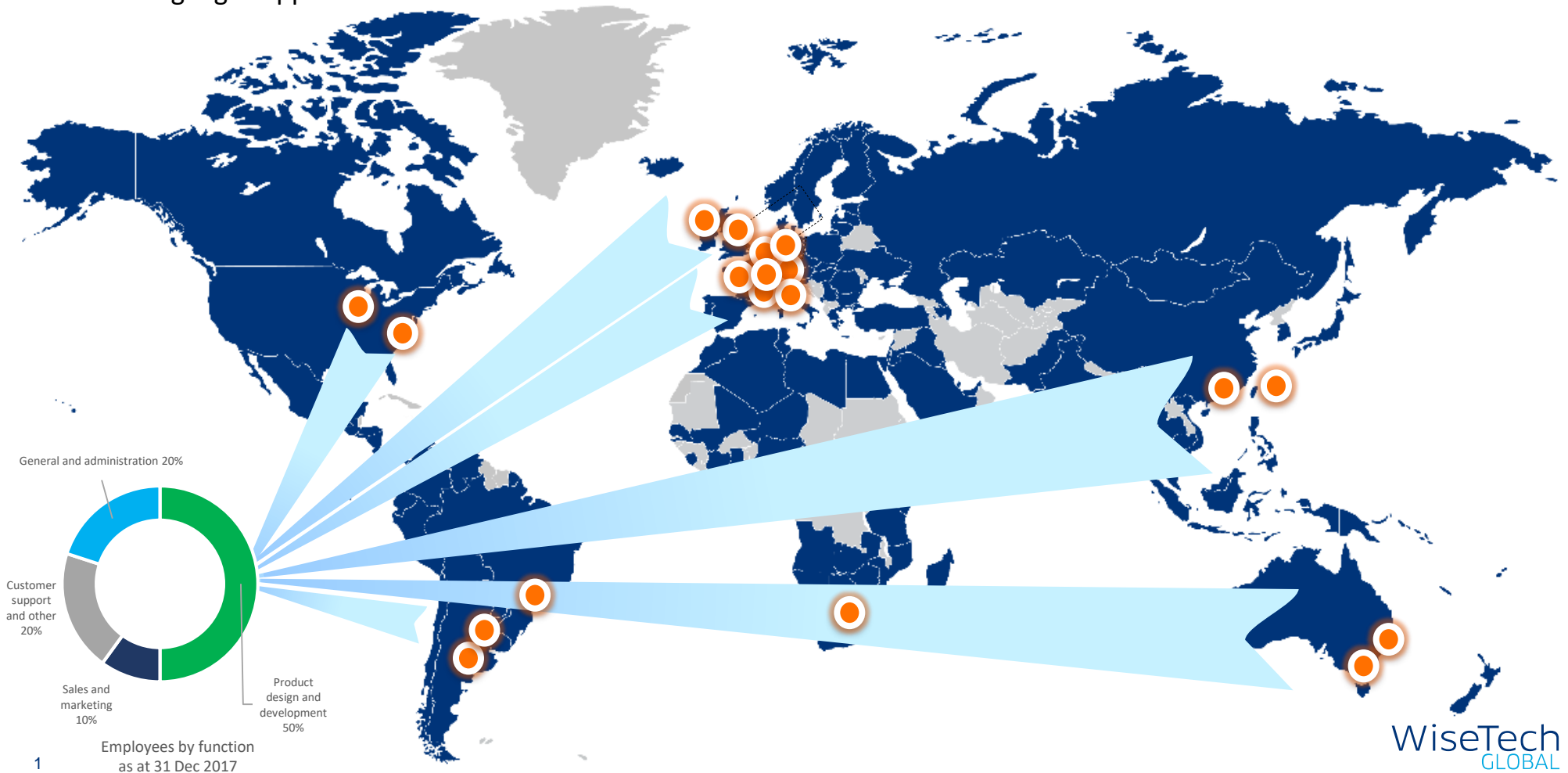
Product development: how we drive innovation

Product, Technology and Strategy Day – 4 May 2018

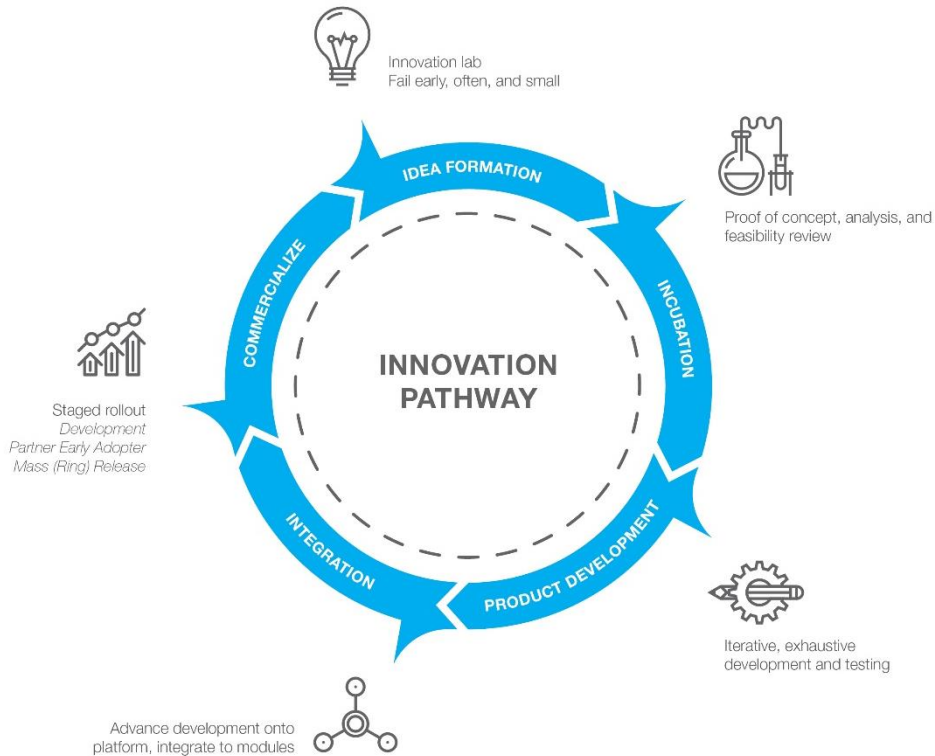


Global innovation development teams

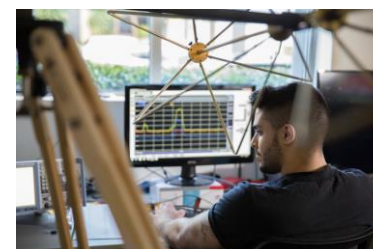
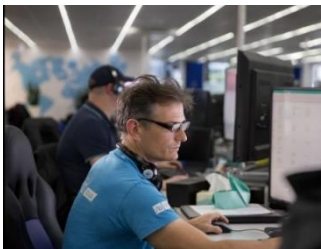
- Universal access to CW1, PAVE, GLOW, Universal Customs Engine
- Global development team over 500 people across 20 countries, leveraging local knowledge
- Multi-language support



We achieve with relentless engineering to remove constraints to scaling innovation

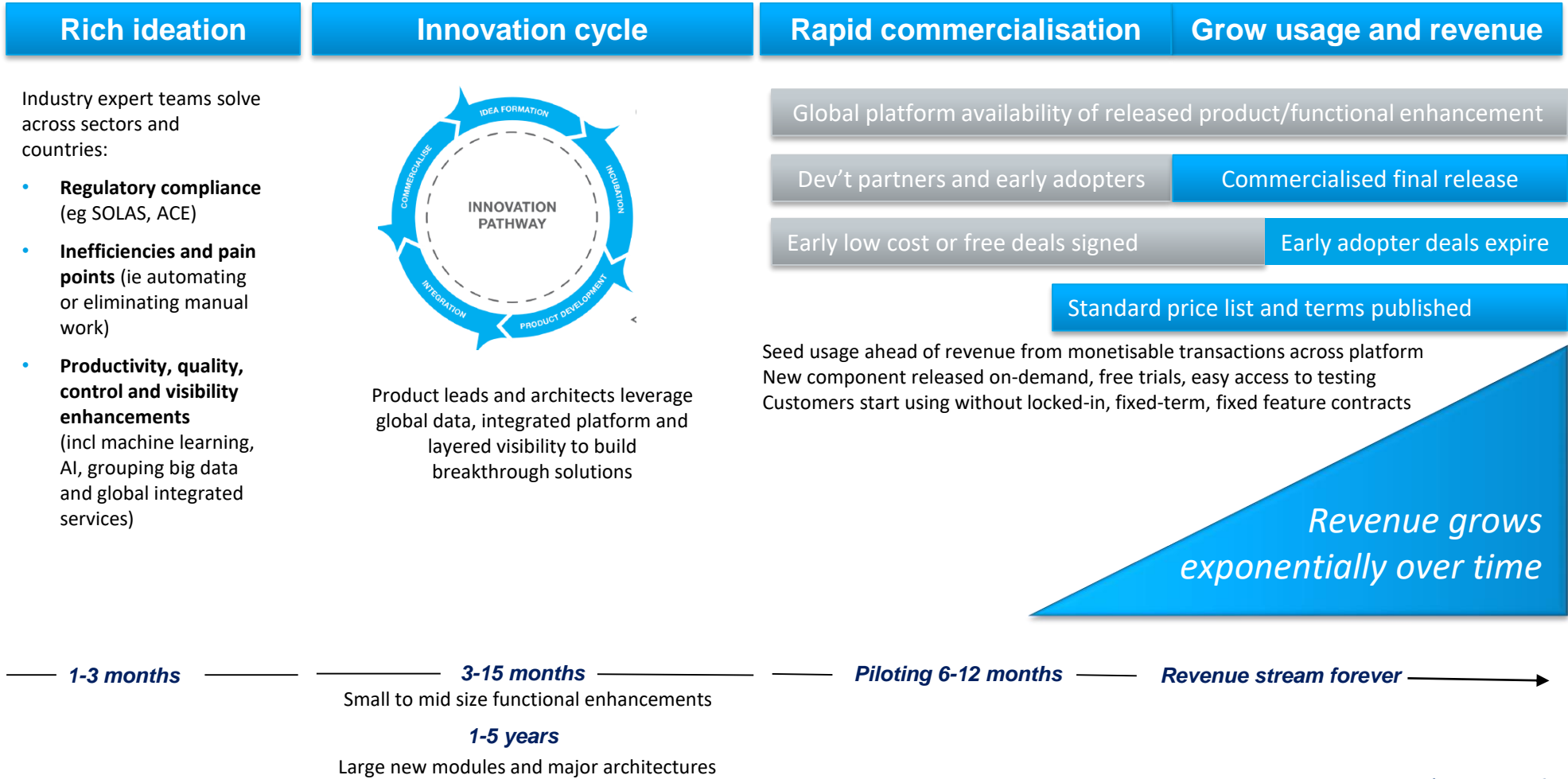


- Culture supports **bold ideas and innovation**
- “Tech creatives” achieve in a supportive environment of “**freedom and responsibility**”
- High performance innovation cycles – we **strive to solve complex, perennial industry-specific problems**, attacking root cause
- “**Test first, fail quickly, improve rapidly**” approach ensures rapid application development at high quality with efficient resource use
- Flat, low hierarchy management, small teams, open hubs, eclectic hires and skill development
- Architectures: PAVE + GLOW + Universal Customs Engine



Product commercialisation and monetisation processes and timeline

High innovation to commercialisation ratio – product designed for CW1 platform + global customer base



Innovation investment

Significant pipeline of longer-term innovations across existing verticals and new adjacencies

~600

product upgrades and enhancements annually

37%

of revenue invested in 1H18

50%

of employees focus on innovation and product development

>670,000

unit tests executed every 45 mins

>\$200m

invested FY14-FY18F

Major development focus on:

- Productivity
- Global data sets
- Machine learning
- Natural language processing
- Guided decision making
- Global automations
- HVLV logistics (e-tail)
- Regulatory environment changes

Over 3,000 product upgrades and enhancements added to the global platform over last 5 years

Our FY18 commitment: >\$65m in innovation and development

Work faster, harder, smarter

PAVE

- Productivity Acceleration Visualisation Engine

GLOW

- 'Build once' architecture and 'coding without coders'

Universal Customs Engine

- Accelerating complex customs localisations

Reduce cost, time, error, risk

WiseRates

- Global data sets
- Real-time access
- Immediate booking

Global Tracking

- Global air/ocean schedules, container and air waybill tracking

BorderWise

- Risk reduction
- Due diligence
- Cost efficiency

Supply chain behavioural change

GEOCODE

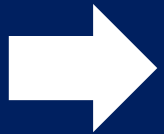
- Global address cleansing
- Geocoding
- Master data de-duplication

Global data sets

- Multi-modal rates, schedules, bookings
- Compliance data
- 3PL supply chain

Machine learning

- Process automation
- Guided decision making
- Natural language processing



BorderWise



Tracking & events



Rates & bookings



Global accounting, netting and invoicing



E-commerce



Know your customer, denied party, Master Data

Innovation pipeline - Why do our customers need BorderWise?

Increasing regulation and complexity across borders

Definition & Example for U.S. HTS Codes

[hts code example]

0901.21.0010

What these numbers mean

09

Chapter

Coffee, Tea, Mate And Spices

0901

Heading

Coffee, Whether Or Not Roasted Or Decaffeinated; Coffee Husks And Skins; Coffee Substitutes Containing Coffee

0901.21

Sub Heading
(HS code)

Coffee, Roasted, Not Decaffeinated

0901.21.00

Subheading
(Determines Duty)

No Distinction

0901.21.0010

Statistical Suffix
(Further Definition and Makeup)

Coffee, Roasted, Not Decaffeinated, Certified Organic

Top import errors

- Valuation date
- Tariffs
- Incorrect delivery address
- Gross weight
- Overseas goods Insurance
- Invoice terms
- Tariff concession orders

Top export errors

- Valuation date
- Gross weight
- Export tariff (AHECC)
- Net weight
- Origin
- Other export data inaccuracy

- Classification governed by the WCO Harmonised System (HS) and then each Government extends the 6 digit HS
- Duty and tax determination requires interpretation using the WCO HS and the local variant, law, regulation, case law etc
- Many other government agencies add requirements to import and export compliance
- Incorrect classification can cause significant delays, fines, penalties, reputation and other risks

- False or misleading information to customs and border protection is a strict liability offence
- Hefty fines impacting the bottom line and/or individual employee
- Over or under payment of duties & GST
- Corporate/individuals liable for underpayments
- Bad compliance record
- Suspension/loss of corporate or individual licence
- Potential dispute and/or loss of client
- Dispute resolution – legal and court costs
- Professional indemnity insurance increase

Innovation pipeline – BorderWise

Global data set + machine learning = powerful border compliance engine, market leading

WiseTech border compliance engine

- + Custom-built global data set
- + Adjacent acquisitions x 2
- + WiseTech machine learning and natural language processing (NLP)

Prototype testing to rapid deployment <6 months

Immediate customer base from ediTariff, Digerati and TradeFox

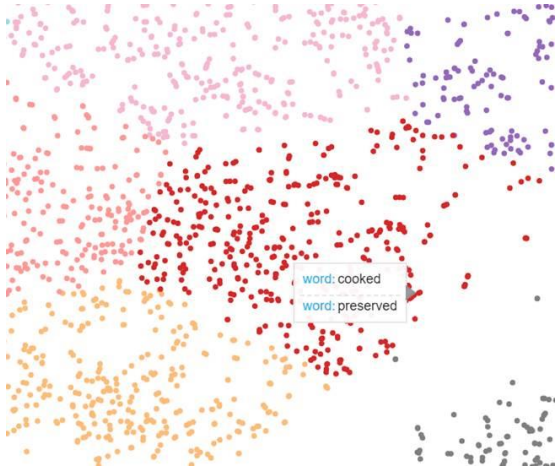
Attractive for large global 3PLs and non-logistics data providers


What's in the box:

- Next generation of compliance management: comprehensive, integrated suite of legal books, technical documents, tariff-classification tools, and reference information.
- Provides the full breadth of customs publications from the World Customs Organization Harmonized System Explanatory Notes and the principles of valuation, to ratified treaties and local legislation.
- Global data set with real-time updates and alerts on legislation, publications and notices from regulatory bodies. Improves productivity, reduces compliance risk, fines, penalties and costs and can help customs and border protection agencies mitigate safety and security risks arising from the movement of goods across their borders.

Development:

- Over 60m past classifications and growing exponentially daily.
- Extensive global and local data set drive our machine learning and NLP techniques.
- NLP will allow levels of automated classification through the use of guided decision trees.
- Available standalone and integrated with CargoWise One.
- SaaS subscription licensing, cloud enabled.
- Launched in Dec 2017
- Rolled out to Australia, NZ and US
- In the future: Canada, Brazil, Germany, Italy, the EU, Mexico, Singapore, South Africa, Taiwan, UK, then ROW.



- 
-  BorderWise
 -  Tracking & events
 -  Rates & bookings
 -  Global accounting, netting and invoicing
 -  E-commerce
 -  Know your customer, denied party, Master Data

Innovation pipeline – Tracking & events

Data availability, speed, accuracy and quality is essential for all parties involved

Customer challenges

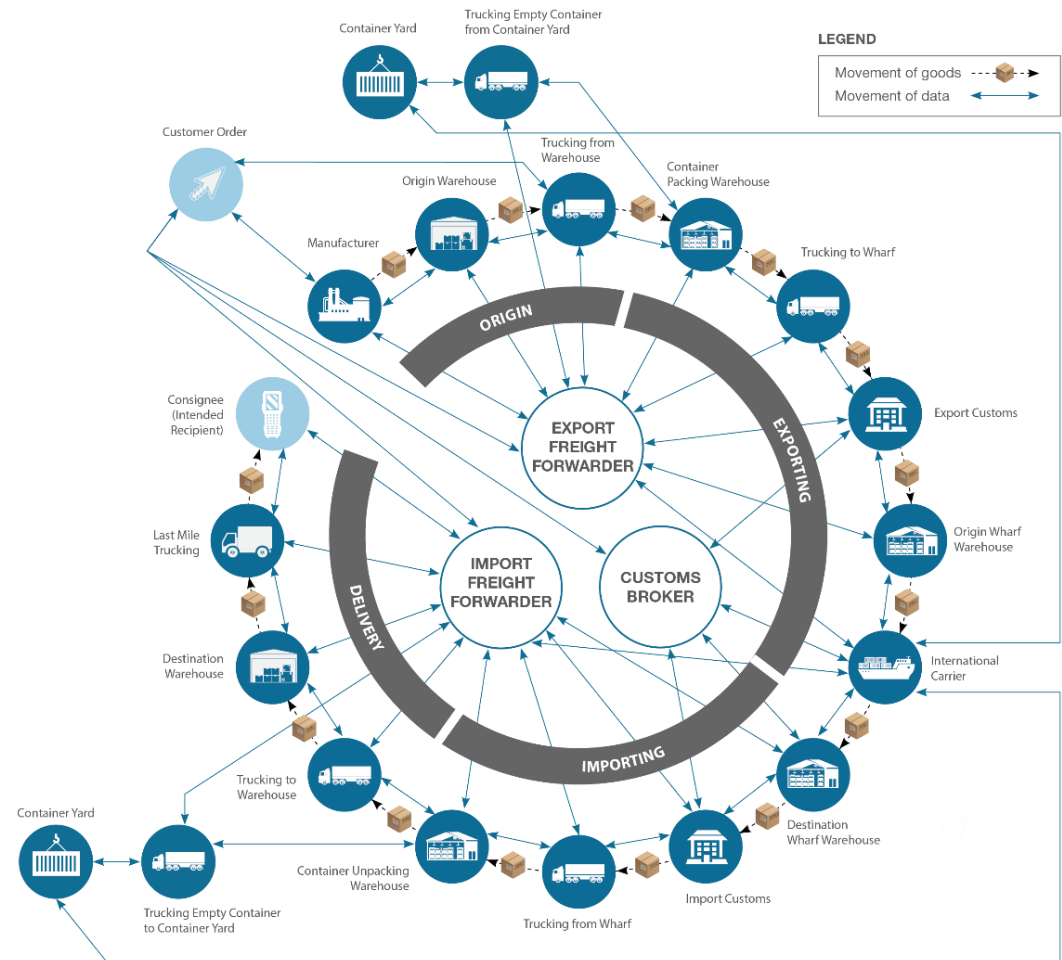
- Manual search of events, manual data entry, risk of error
- Too much data to monitor
- Loss of productivity
- Possible delays and penalties
- Missed connections, futile trips

Industry challenges

- Industry growth:
 - Over 20 million TEU in operation (650m TEU rotations per annum)
 - Over 50,000 merchant vessels including over 5,000 containerised
 - Hundreds of ocean carriers and airlines
 - 25 million AWB per month
 - ~36 million commercial flights a year (IATA 2017)
- Inability of multiple logistics players to share data electronically, and those who can only provide data to exporters as a response to electronic booking, leaving other logistics providers out

Information challenges

- VOLUMES and VOLUMES of information
- No two sources of data are the same
- Data duplication: similar data provided by different sources
- Data is available too late
- Cargo can be offloaded or split
- It is a configuration and data setup nightmare



Innovation pipeline – Tracking & events

Global data set, powerful, unique global tracking engine

Powerful global tracking for containers and vessels

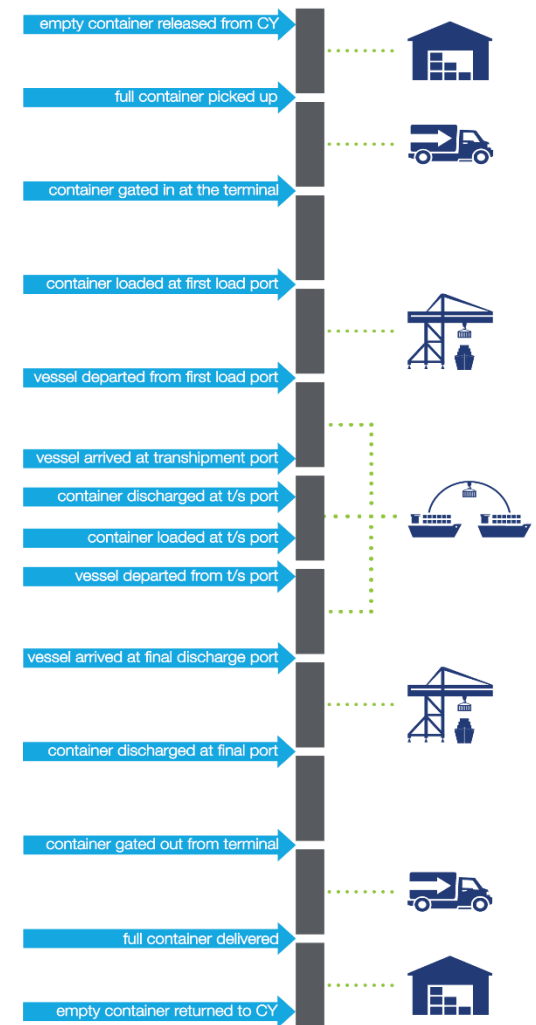
- + Custom-built global data set – ‘one source of truth’
- + WTC proprietary advanced analytics and workflow automations
- + Embedded in CargoWise One and will integrate with acquired rates engines

Immediate customer base from CargoWise One global platform

Container tracking – adopted by DHL GF, Geodis, Rohlig & many others

Covering 36 top ocean carriers, representing over 90% of industry volume

- Fully embedded into CargoWise One: cloud enabled, transaction licensing for tracking, schedules in STL seat charge
- Launched container and associated vessel tracking, schedules for ocean and air, with further phased rollouts
- Large global set, cleansed, validated and designed to provide visibility of every ocean container, booking and master bills from 36 major ocean carriers covering over 90% of industry volume
- Container tracking provides critical timely and accurate updates on ~30 different statuses: eg carrier, government, customs and quarantine statuses, cargo pick-ups, loading, consignee receipts
- Built on top of powerful workflow engine, provides automated alerts to staff, customers, agents and third parties and automated triggering of downstream transactions
- Embedded in Freight Forwarding and Customs, designed to link to Rates, Warehousing, Land Transport and broader CW1 platform
- Inbuilt access to airline and ocean schedules provides planning tools and selection of most optimal routes with automated updates
- Real-time flight tracking provides real time information on flight departures and arrivals, alerts on possible delays and cancellations – available in pilot for selected customers
- Currently WTC receives over 12m air freight status updates annually for exporters
- Enhanced AWB tracking to be launched in the next phase: tracking targeting cargo movements inland and in the air, status updates for all logistics providers
- Continuous improvements to the existing data set
- Zero configuration from users, reduced headcount, penalties, delays, missed shipments, detention, risks = increased productivity

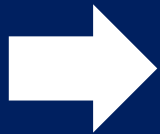




BorderWise



Tracking & events



Rates & bookings



Global accounting, netting and invoicing



E-commerce



Know your customer, denied party, Master Data

Innovation pipeline – Rates management

Data availability, speed, accuracy and quality is essential for all parties involved

Customer Challenges

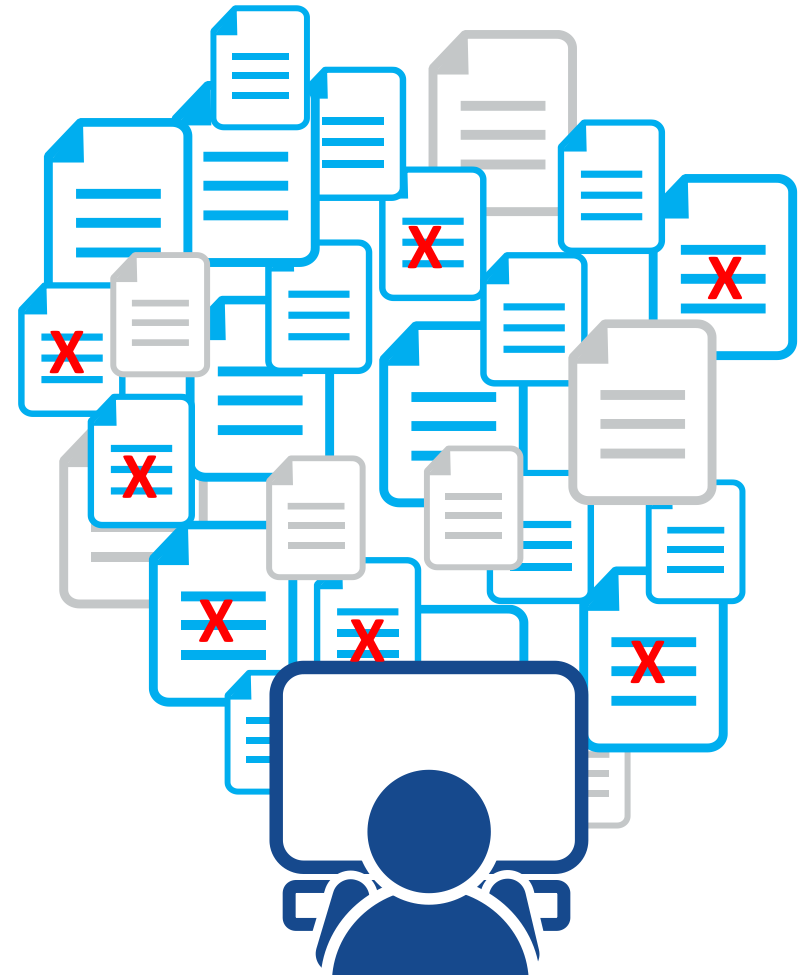
- Ocean carrier contracts are highly complex and not standardized
- Manual entry of contract and rate information both costly and error prone
- Tight margins mean incorrect buy rates can reduce or eliminate profit on a shipment
- Inaccurate invoices lead to time consuming dispute processes and journal adjustments
- Shipments (cargo) can be held by a carrier due to lack of timely payment of invoices

Industry Challenges

- Freight forwarders:
 - Time consuming: estimated 24.4m hours per year spent by freight forwarding industry handling buy-rate management
 - Costly: Annual labor cost expended by the global freight forwarding industry to manage and/or find accurate carrier buy-rates is estimated to be US\$500m
 - Inaccurate: inaccurate invoices reported as high as 12% to 20%
- Ocean carriers:
 - Distribution methods to customers still very 'manual' via email attachments, website updates
 - Confidentiality of contract rates, and rapidly growing spot market, pose distribution concerns

Information Challenges

- 1,000+ potential surcharges (average 9 per shipment)
- Can be 100+ different port pairs in a single contract
- Coding of freight charge types different per carrier and customer
- Different data and contract structures per carrier



Innovation pipeline – Rates management

Global data set of real-time, accurate rates

Powerful global data set of carrier rates

+ Real-time access to rates within your operational system

+ Embedded in CargoWise One and will integrate with acquired rates engines

What's in the box (WiseRates/CW1):

- Provides a live, centralized, global data set on carrier rates
- Supports auto-rating of shipments
- Standardizes carrier rates and charge codes
- Directly optimizes profit margins of all CW1 supply chain quoting and billing operations

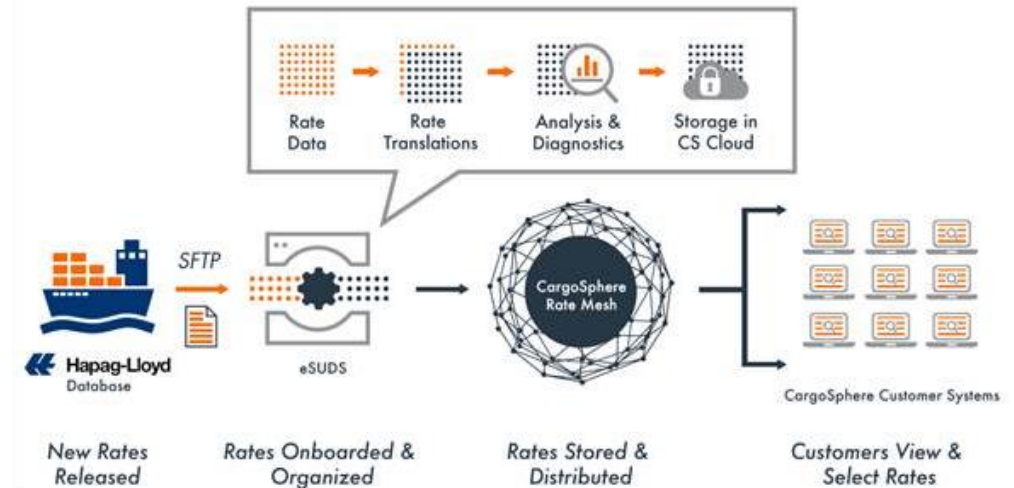
What's in the box (CargoSphere):

- Neutral platform linking carriers and BCOs, freight forwarders & 3PLs
- Rates Mesh standalone and data integrated to CW1 customers
- Hapag Lloyd (top 5 ocean carrier) is the first to offer its customers automatic access to all their contract rates using CargoSphere's electronic Smart Upload and Diagnostics Solution (eSUDS)
- CargoSphere provides rate management solutions and Rates Mesh to over 100 customers including Kuehne + Nagel, Dachser, M+R Spedag, and Livingston International

Development:

- Provide rate back to carrier within booking and shipping instruction
- Single sign on (SSO) for enhanced user experience for CW1 customers
- Integration with Cargoguide for air rates management
- Integration with land transport providers/integrators

Hapag-Lloyd Digital Rate Distribution in CargoSphere Platform



“Eliminating the email distribution of spreadsheets and PDFs is an exciting moment for Hapag-Lloyd. We are committed to improving efficiency for our customers and ourselves, and this joint Hapag-Lloyd/CargoSphere integration achievement is an important contribution to the industry as it improves timeliness and accuracy”

Henning Schleyerbach, Senior Director Sales & Service Processes of Hapag-Lloyd



BorderWise



Tracking & events



Rates & bookings



Global accounting, netting and invoicing



E-commerce



Know your customer, denied party, Master Data

Innovation pipeline – third party logistics requires specialised accounting

Supply chain activities, fragmented data and domestic regulations add complexity

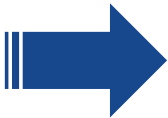
Challenges in 3PL accounting

Day-to-day business

- Issuing invoices, posting costs and tracking job profit for thousands of jobs per month

Invoicing compliance

- Tax determination
- Presentation of the invoice document
- Electronic invoicing compliance
- Fiscal compliance invoice vs invoice as 'request for payment'



Settlement

- Complexity of transactions = disputes
- High volume = lengthy reconciliation processes
- Credit controls critical to reduce bad debt exposure
- Inter-agent settlements = high cost



CargoWise One solves globally – 130 countries

Invoicing and invoicing compliance

- VAT engine extended over time to meet the needs of 130 VAT countries - focussed on logistics industry businesses
- Cash basis VAT implemented generically for all jurisdictions
- Fiscal document classification + numbering engine
- Generic Transaction Compliance Reporting Engine
- Cost and revenue estimates linked to invoice cost + revenue invoice posting
- Job transactions automatically integrated into general ledger
- Universal XML model for accounting transactions

Settlement

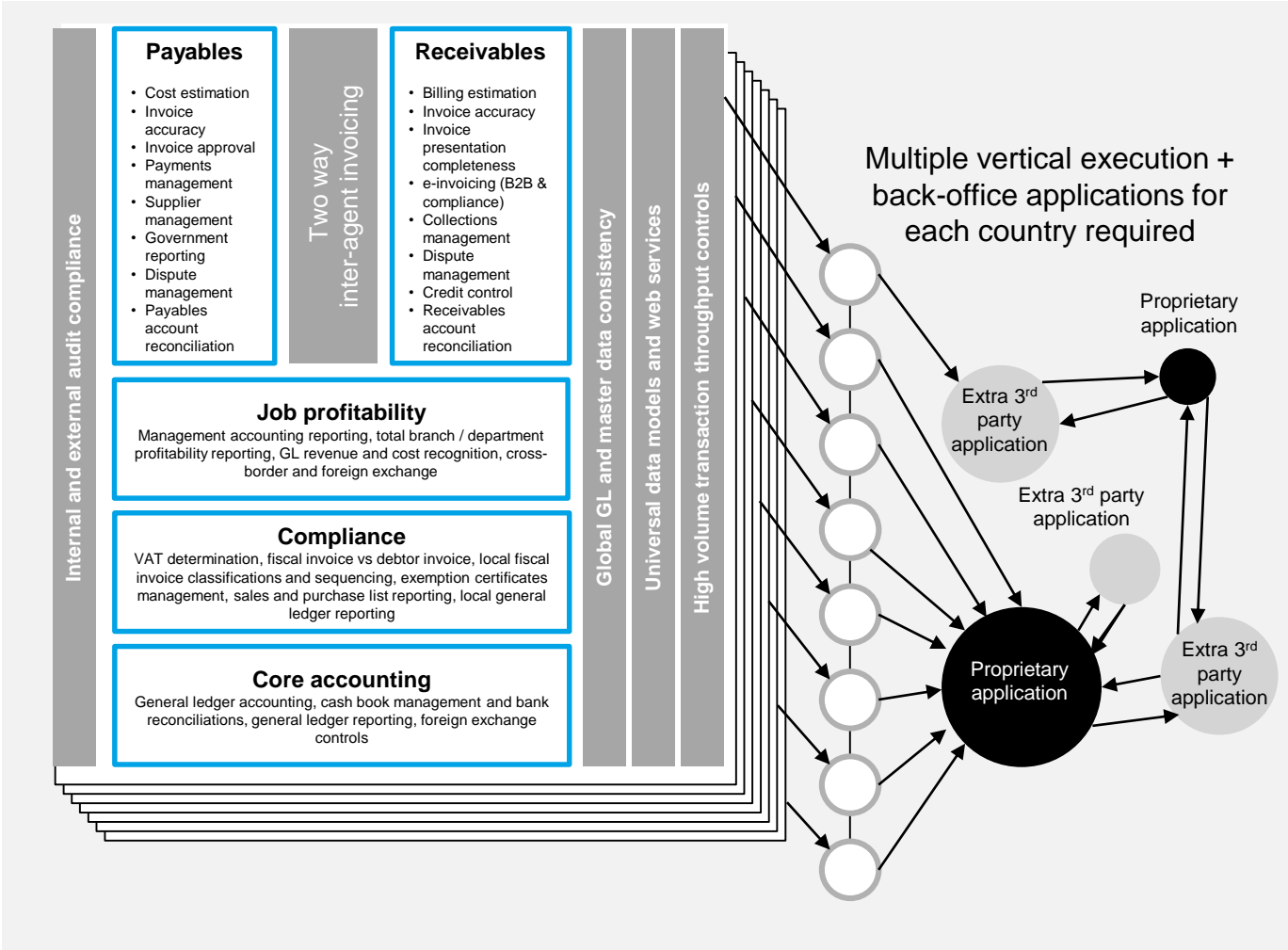
- In-built payments + receivables management
- Integrated dispute management for claims + queries
- Bulk AR + AP data management

Inter-agent settlement

- Multi-lateral, multi-currency global invoice + payment netting
- In development partner pilot phase now

Innovation pipeline – 3PL requires specialised accounting

Complex network of applications replaced with CargoWise One



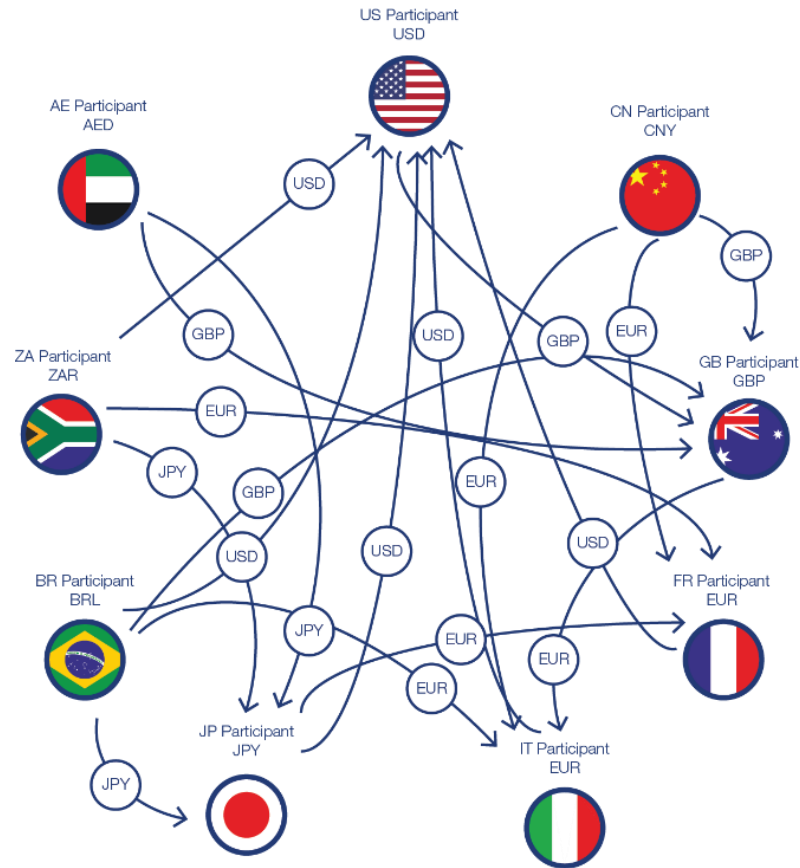
Complex network of applications replaced with **CargoWise One**



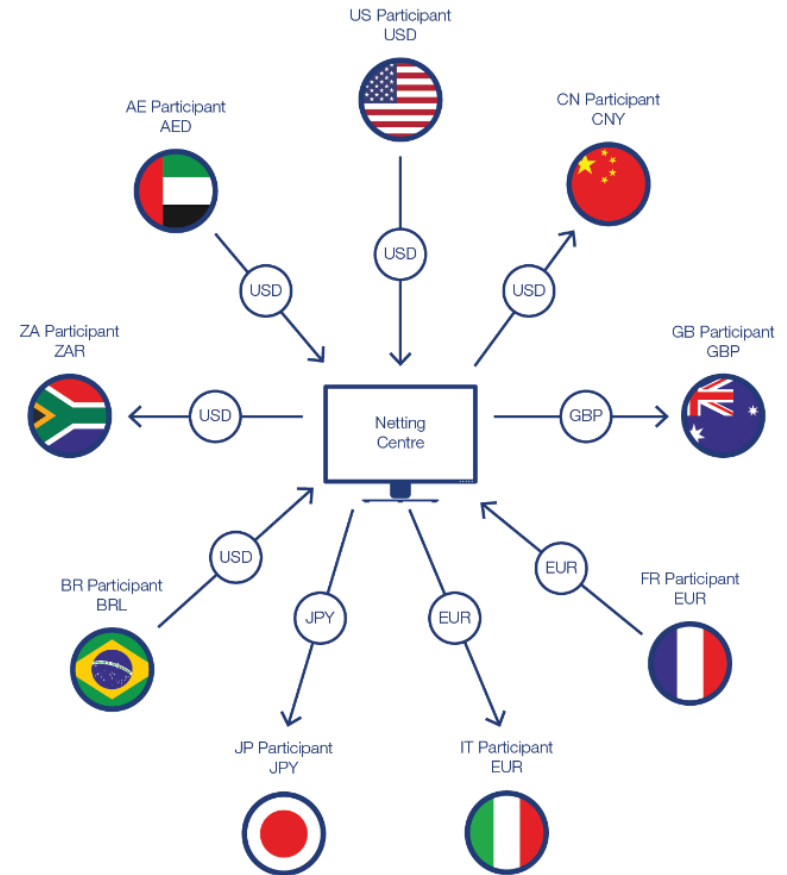
Innovation pipeline – CargoWise One delivers netting in addition to accounting

Netting reduces the number of payments and shortens the time taken for reconciliations

Without netting



With netting





BorderWise



Tracking & events



Rates & bookings



Global accounting, netting and invoicing



E-commerce



Know your customer, denied party, Master Data

Innovation pipeline – e-tail 2nd generation, High Volume Low Value

Scalable, high volume integrated solution for 3PLs facing e-commerce juggernaut

International e-commerce solution designed for higher volume levels

Country agnostic – founded on the global customs strategy

Designed for seamless rollout to CW1 customers + their partner warehouses

Web-enabled, multi-user interface, multiple devices

Global rollout expected FY19

- Currently in prototype test with development partner, then roll out to existing AU & NZ customers.
- Phase 1 launch complete FY18 with destination depot. Phase 2 origin warehousing, courier integration and automations in FY19.
- Fully integrated, highly scalable, cross border solution for HVLV packages
- Next generation to our existing e-commerce product (AU)
- Full integration between freight forwarding, customs brokerage, warehousing, last-mile carrier management and online tracking
- Transaction-based licensing, cloud-enabled
- Immediate customer base from our existing e-commerce customers





BorderWise



Tracking & events



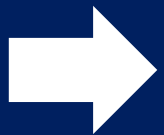
Rates & bookings



Global accounting, netting and invoicing



E-commerce



Know your customer, denied party, Master Data

Innovation pipeline – Geo compliance: the cost of shipping to a denied party

Increasing government scrutiny, increasing fines and penalties

US Export Administration Act 1979

- Criminal penalties
 - \$1,000,000 per violation
 - 20 years imprisonment per violation
- Administrative penalties
 - \$250,000 per violation, or twice the amount of the transaction, whichever is greater
- Loss of export licence

Compliance thwarted by problem of scale

- More than 120 lists globally
- Over 200,000 denied parties
- 3,000 changes per week

“We are putting the world on notice: the games are over. Those who flout our economic sanctions and export control laws will not go unpunished – they will suffer the harshest of consequences.”

Wilbur Ross – US Secretary of Commerce

FY		Criminal	Administrative
2013	Convictions / cases	52	63
	Fines / penalties	\$20.9M	\$6.1M
	Imprisonment	73 Years	
2014	Convictions / cases	39	44
	Fines / penalties	\$139.1M	\$60.4M
	Imprisonment	47 Years	
2015	Convictions / cases	31	47
	Fines / penalties	\$240.9M	\$15M
	Imprisonment	40 Years	
2016	Convictions / cases	32	35
	Fines / penalties	\$79.3M	\$23M
	Imprisonment	73 Years	

2017 ZTE was fined a record \$1.19B in March for exporting communications equipment to Iran and North Korea

Record fine in 2017 \$1.19bn

<https://www.bis.doc.gov/index.php/enforcement/oe/penalties>
<https://www.commerce.gov/news/press-releases/2017/03/secretary-commerce-wilbur-l-ross-jr-announces-119-billion-penalty>

Innovation pipeline – Geo compliance: the denied party solution

CargoWise One – an integrated solution

Fully integrated screening of

- organisations and contacts
- vessels

Stops document production for

- shipments and consolidations
- US customs declarations





List updates are automated

Match rates improved by:

- automated rescreening
- duplicate removal
- multiple fuzzy matching techniques
- address verification before screening (125m to date)

More than 2 million screens in 2017

Denied Party Screening Results

	Screened	Denied
 Organisations	879,040	986
 Vessels	52,780	98
 Shipments	4,845,925	129,228
 Consolidations	2,099,980	111,548

“For us, the address validation is a mandatory step for denied party screening... so we are fine with the validation! It's VERY fast and now that the address validates as you are typing it into the organization module, it's even better!”

Debbie Strojan – OIA Global

WiseTech
GLOBAL

INNOVATION AND EXPANSION OF OUR GLOBAL PLATFORM

Architecture / data centres / security / scalability
Brett Shearer, Chief Technology Officer

Product, Technology and Strategy Day – 4 May 2018



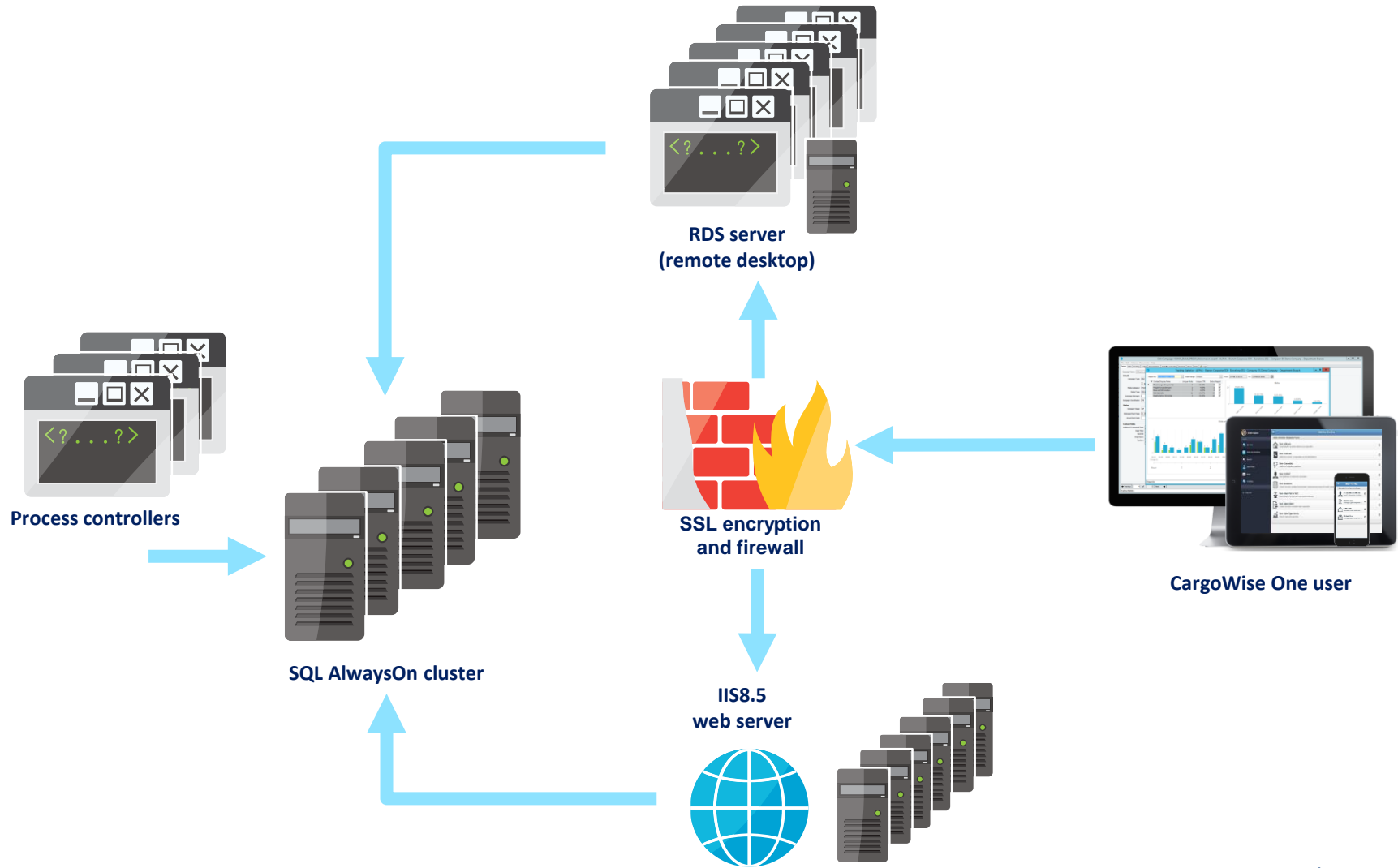
Integrated global platform structured to be the 'operating system'

- CargoWise One is designed to be the 'operating system' with infinite scale
- Investment in single-source code integrated global platform
- Platform operates efficiently for small users to tens of thousands users per customer
- Test-driven product development framework with 670,000 tests run every 45 minutes
- Focus on efficiency 'more with less'
- Ongoing annual data transaction reduction

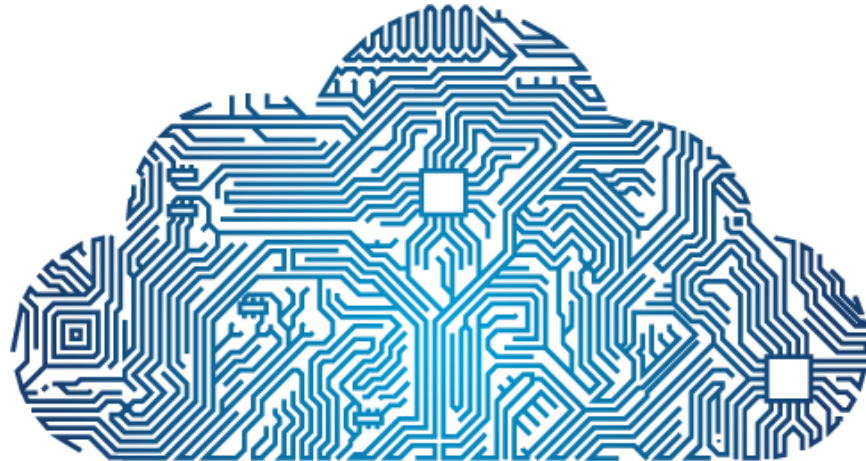


CargoWise One scalability

Scales out for high performance and repeatable implementation



Global data centres located in UK, Asia Pacific and North America



WiseCloud



England,
Milton Keynes
Europe, Middle East, Africa



North America,
Chicago
United States, Rest of World



Australia,
Sydney
Asia, Australia, New Zealand

WiseCloud hosting benefits

Benefits to customer

- Faster go-live
- One-stop-shop: provides all they need
- Tuning/optimisation/monitoring provided as part of hosting
- GDPR requirements managed
- SOC accreditation for all data centres
- No upfront capital expense – all operational

External products that are used for hosting

- Dell servers
- CISCO networking
- Windows / Linux (Cent OS 7)

Why do some customers use private cloud?

- Security/control protocols
- Existing hardware and IT services spend is utilised



CentOS



Security

Security implemented at all layers to protect against all forms of attack

Software management

Automated patching

Single eHub/Universal*
interface decreases surface area
for attacks



Data centre

Whole cloud owned by
WiseTech

Independent audits

- Vulnerability scans
- Penetration testing
- Risk assessment
- SOC accreditation

Access

Physical access controls

- Two factor authentication internally

Logical access

- Single sign-on
- interfaces encrypted with SSL

Development

All development in-house (No
outsourcing)

Approach to technology

Technology choices are based on fitness for purpose – no exclusions due to vendor or platform

AI/NLP/ML

Languages

- Scala
- R
- Python

Techniques

- Neural networks
- Word vector representation
- Big data
- Natural language processing
- Machine learning

Storage/data

Software defined networking

NoSQL

- Mongo
- Graph database

RDMS

- Postgres
- SQL server

Indexing

- Lucene
- Elastic Search

Platform/messaging technologies

- Kafka
- Blockchain/distributed ledgers

Out on the horizon... quantum computing



WiseTech
GLOBAL

ACCELERATING ORGANIC GROWTH THROUGH ACQUISITION

Panel: Experience of origination, acquisition, integration
Bysoft, CargoSphere, Microlistics, ABM Data Systems

Product, Technology and Strategy Day – 4 May 2018



Panel guests



Edneia Moura Chebabi
Managing Director
bysoft Soluções Em
Sistemas ('Bysoft')

Edneia founded Bysoft in Brazil in 1991, a company that went from success to success, being awarded the Best Company Global Award for developing logistics solutions for foreign trade in 1999.

In 2005, Edneia was awarded the Prêmio Intermodal for the Best Businesswoman of the year. Edneia has 35 years of experience in information technology, and 30 of these were dedicated to developing software for foreign trade management.

Bysoft was acquired by WiseTech Global in 2017.



Stewart Bourke
Managing Director
ABM Data Systems

Stewart has 30 years' experience leading successful development teams in various high-volume European logistics organisations.

Stewart founded a transport management software company, which was acquired by a major European postal operator in 1999.

Using his extensive industry experience, Stewart founded ABM Data Systems in Ireland in 2006, with a vision to create a global customs platform.

ABM Data Systems was acquired by WiseTech Global in 2018.



Mark Dawson
Managing Director
Microlistics

Mark has nearly forty years' experience in the logistics industry.

Prior to founding Microlistics, Mark worked at transport companies TNT Group and Henderson.

In 1990, Mark established Dawson Consulting International which went on to become Australasia's leading supply chain and logistics consulting practice, and in the same year founded Microlistics to address the gap in the software available for the running of warehouses and distribution centres.

Microlistics was acquired by WiseTech Global in 2018.



Neil Barni
Managing Director
CargoSphere

Neil founded CargoSphere in 1999 with an aim to create a market leading freight rate management and networking solution. CargoSphere connects the global shipping industry with its collaborative and confidential technology platform, the Rate Mesh, the neutral rate network for container shipping.

Prior to CargoSphere, Neil held various roles in the international logistics division of the Pepsi Cola Company and has over 20 years of international supply chain experience.

CargoSphere was acquired by WiseTech Global in 2017.

Overview

- Founded in 1991, Bysoft is the largest provider of customs brokerage, government compliance and freight forwarding solutions to the logistics industry across Brazil
- Pioneers with 27 years' experience
- Headquartered in São Paulo, Bysoft has a team of 50 industry and technology experts
- Bysoft provides automated software and solutions to about 750 logistics customers, comprising more than 3,000 users
- Customers include DHL, FedEx, UPS, Schenker, Yusen and CH Robinson



Market opportunity

- Brazil is the 5th largest country in the world
- The foreign trade market in Brazil is made up of more than 43,000 importing companies and 25,000 exporters companies¹
- There are about 5,500 freight forwarders and customs brokers in Brazil².
- Bysoft the largest software company for logistics in the country³



Specialists in the Foreign Trade market



Compliance, commitment, respect and partnership with our client



Specializing in providing solutions for service providers

¹ <http://www.mdic.gov.br/index.php/balanca-comercial>

² <https://www.ibge.gov.br/>

³ Estimate based on Bysoft and WiseTech Global data, 2018

ABM Data Systems



- Founded 2006 in Dublin, Ireland
- Vision – to create a single global customs platform
- Headcount (2017) – 22 staff
- Proven technology – currently supporting 80+ procedures in 8 countries

Country	Export	Import	Transit	Warehousing	Port systems
NL	✓ Certified	✓ Certified	✓ Certified	✓ Certified	✓ Certified
BE	✓ Certified	✓ Certified	✓ Certified	✓ Certified	✓ Certified
DE	✓ Certified	✓ Certified	✓ Certified	✓ Certified	✓ Certified
GB	✓ Certified	✓ Certified	✓ Certified	✓ Certified	✓ Certified
IE	✓ Certified	✓ Certified	✓ Certified	Not Applicable	Not Applicable
CH	✓ Certified	✓ Certified	✓ Certified	Not Applicable	Not Applicable
AE	✓ Certified	✓ Certified	Not Applicable	Not Applicable	Not Applicable
SE	✓ Certified	✓ Certified	✓ Certified	Not Applicable	Not Applicable

ABM Data Systems



- Typical customer – any company with customs/compliance requirements in multiple jurisdictions
- Acquired Dec 2017
 - Very positive market and team reactions
 - Working with WiseTech Global since 2012, already integrated



Global reach

In 2018, due to new partnerships and customer expansion around the globe, Microlistics has more global reach than ever before.



● Offices / Partners

The map displays a world map with various locations marked by teal circles. The legend indicates that teal circles with a purple center represent 'Offices / Partners', while teal circles with a white center represent 'Client Sites'. Locations are spread across North America, Europe, Africa, Asia, and Australia.

○ Client Sites

50 Employees

“Our Best Fit Customer”

Any size, any vertical.

In 2018 most Microlistics clients are Level 4 on the Gartner strata.

Level 4
Warehousing

The Microlistics
Sweet Spot

Third Party
Logistics

Multi-Vertical

The strength of a **single configurable platform** enables the same business to handle many different verticals.

It is not uncommon for a Microlistics WMS client to be managing all of the below:

- 3PL
- FMCG
- Catchweight Meat
- Shelf/Batch/Lot/Serial etc
- Technology
- Pharmaceuticals

Microlistics' customer base is still dominated by 3PL's.

Ocean Rates: A \$500MM Problem

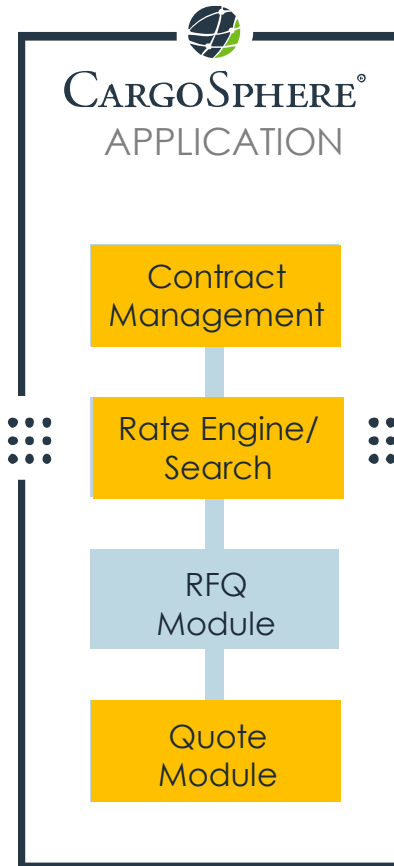


Confidential contracts are sent by email in Word, PDF and Excel



50,000 Freight Forwarders spend USD \$500MM annually to systematize rate data ¹

Rate volatility & complexity makes bottom-line cost calculations difficult



Fragmented carrier systems drive 12-20% invoicing errors ²

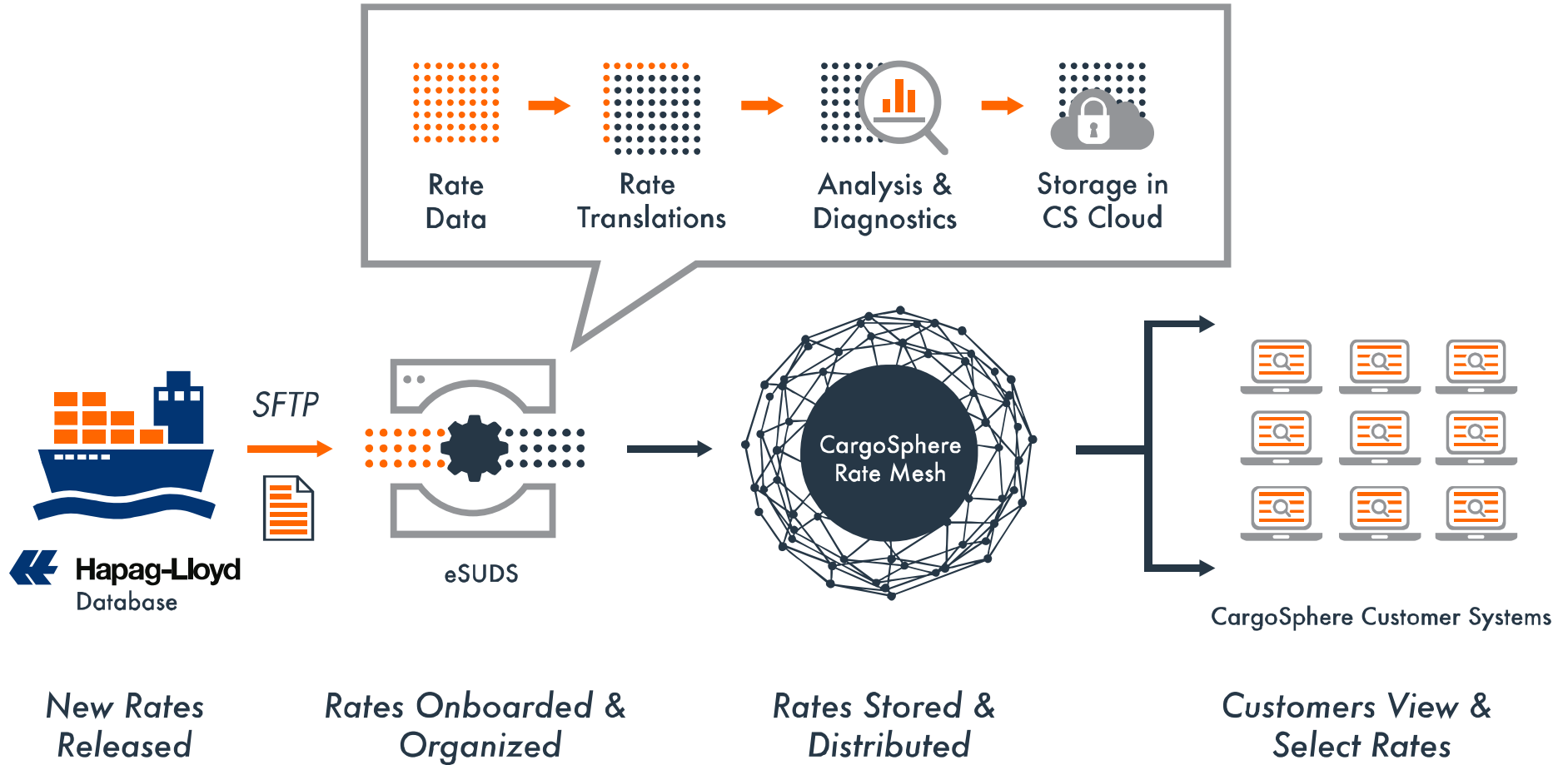


Late quotes = Lost business
Old buy-rates = Lost profits

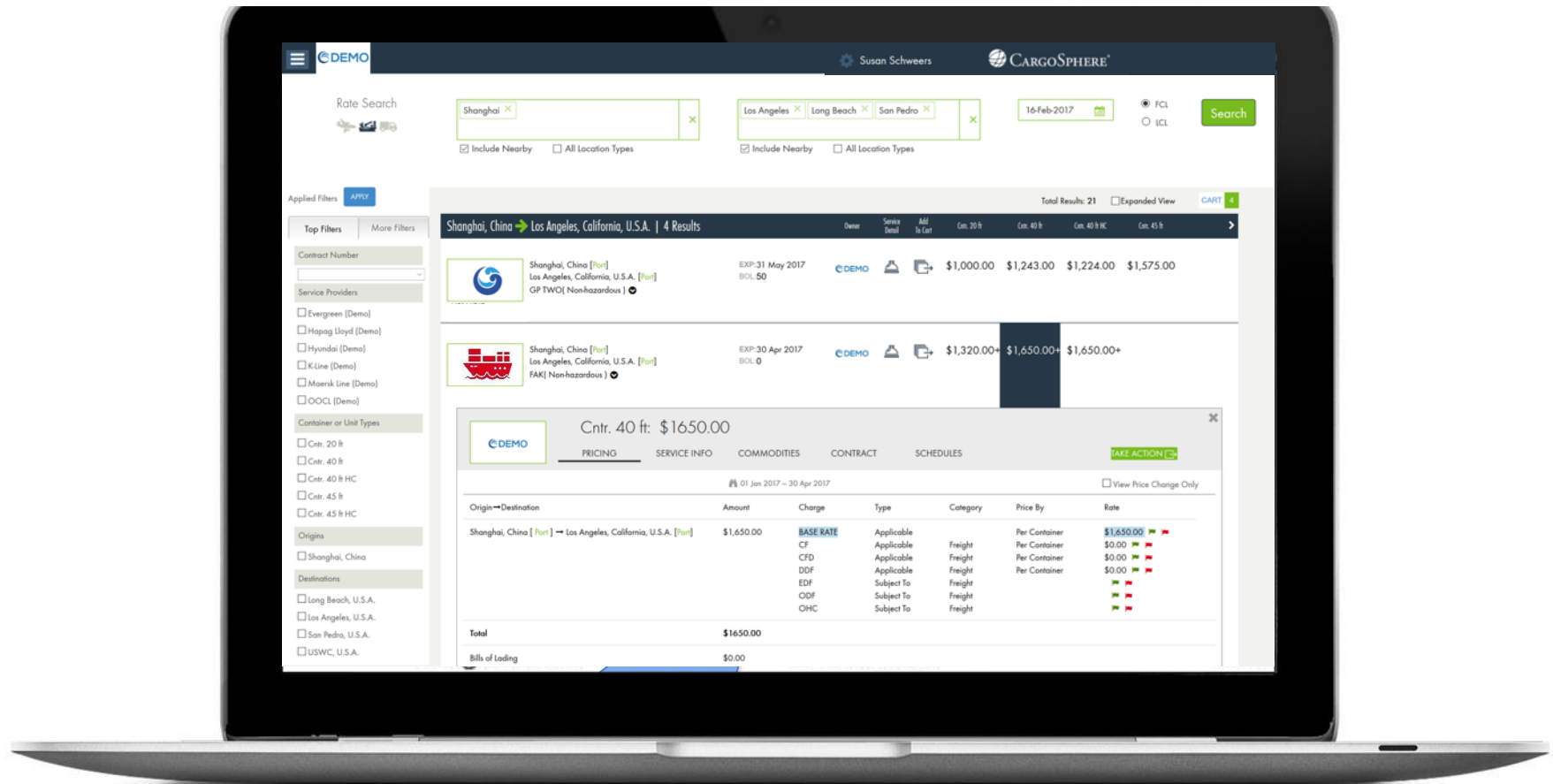
¹ Drewry study available on www.cargosphere.com or click [here](#)

² Ocean Audit Inc on Linked-In or click [here](#)

Hapag-Lloyd Digital Rate Distribution in CargoSphere Platform



Our Solution: Search In Seconds



WiseTech
GLOBAL