Counterpoint 5 June 2024

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Where did the report perform? Last year report $50K pounds. Primary reports

50K pounds, Actuator 90K pounds

Scope – Can scope be optimize? Shipset values? SME grid analysis, what are the major drivers? Narrow body shipset value? Huge driver.

Trying to scope an update. 3-4 weeks elapsed time.

FC – shipset values

Strategies – canonical models to scale to lesser known models. Scale A350 data to B787

Struggle – scope of work “massive amount of money”

Target Audience:

* OEMs – one of the major guys
* Industry players – Tier 1 & 2
* Management consultancy (a little investment bankers)

FC – How do the buyers buy. Key of financials. Less important: “what are avionics”

Management consultants – they will hand it off to “bright people”

Risk sharing with SME. Typically: returning customers (small amount) New customers: (more money)

“turn a 50K report to a 75K report”

Avionics report was a stretch from the focus on aerostructures.

Heller can propose risk model