



# 2023: INVESTING INTO AN EVOLVING DATA CENTER LANDSCAPE

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**Marc Ganzi**

Chief Executive Officer, DigitalBridge



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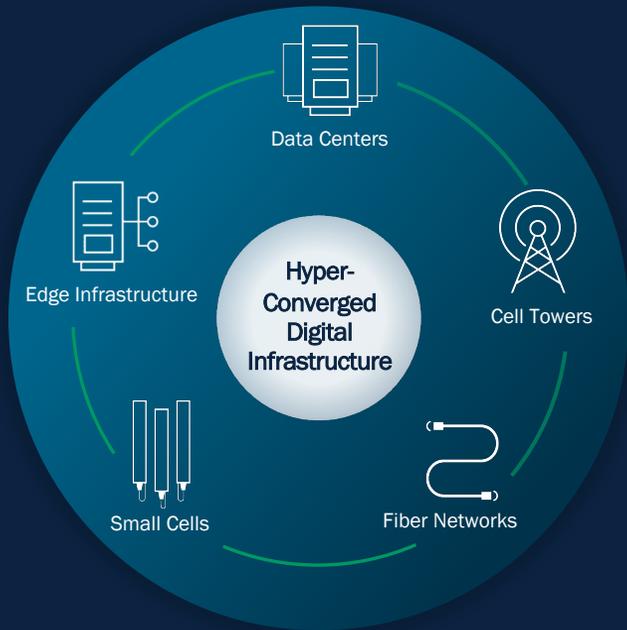
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AN EVOLVING DATA CENTER ECOSYSTEM

**INVESTING ACROSS THE DIGITAL ECOSYSTEM**

DigitalBridge’s investment strategy seeks to provide investors exposure to a portfolio of high growth, resilient businesses enabling the next generation of mobile and internet connectivity



# A LEADING GLOBAL DIGITAL INFRASTRUCTURE FIRM

DigitalBridge is a leading global-scale infrastructure partner to the digital economy investing across five key verticals: data centers, cell towers, fiber networks, small cells, and edge infrastructure

**\$60B+**

Digital Assets Under Management<sup>1</sup>

**27**

Digital Portfolio Companies<sup>2</sup>

**100+**

Digital Infrastructure Professionals<sup>3</sup>

**25+**

Years of Experience



(1) AUM as of December 6, 2022, and inclusive of portfolio companies in which DigitalBridge Group, Inc. has invested from its balance sheet or for which a subsidiary of DigitalBridge Group, Inc. provides investment advisory services (collectively, "DBRG Owned and Advised Companies"). (2) Digital Portfolio Companies as of December 2022, and inclusive of DBRG Owned and Advised Companies. Acquisitions of AIMS and GD Towers have been agreed in definitive purchase agreements, but the transactions remain subject to customary closing conditions; there can be no assurance these transactions will reach financial close. (3) Digital Infrastructure Professionals as of September 30, 2022.

# A NEW WAY TO INVEST IN DIGITAL INFRASTRUCTURE

‘Full stack’ approach to Digital Infrastructure gives DigitalBridge the ability to invest, operate and seeking to capitalize on \$400+ billion of annual global capex that enables us to pair capital to the right risk-adjusted opportunity. Responsibly stewarding capital on behalf of our limited partners and shareholders is our mission.

## Infrastructure Equity

Investing globally, building businesses across the digital infrastructure ecosystem

## Infrastructure Credit

Financing growth of the Digital Economy

## Liquid Strategies

Investment programs for public markets

## Core Equity

Investments in long-duration, stabilized assets in developed markets

## Ventures

Investing in the software layer at the intersection of technology and infrastructure

## Power of the Platform



Sourcing  
Cross-Pollination



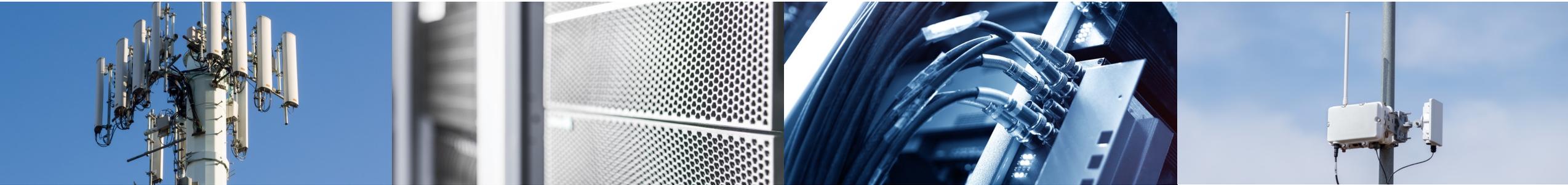
Market Intelligence  
“Eyes and Ears”



Talent Acquisition

# THE DIGITAL INFRASTRUCTURE SPECIALISTS

The DigitalBridge team has a 25+ year track record of successfully building businesses in the digital infrastructure sector. Focused specialization creates durable competitive advantages that generate alpha for our portfolio companies and investors



## OPERATIONAL EXPERTISE

- Senior Leadership team has deep operational expertise across the full spectrum of Digital Infrastructure
- Bench consists of global industry leaders

## SECTOR FOCUS

- Sector specific focus provides clear differentiation from other alternative asset managers
- Provides distinctive ability to source proprietary capital deployment opportunities

## PLATFORM CREATION

- Ability to create value at scale, combining access to capital with top industry management
- Unique ability to buy and/or build across market cycles

## CUSTOMER CENTRIC

- Portfolio company operating model focused on delivering for customers
- Differentiate from competition through speed and flexibility

# EXPERIENCED TEAM DEDICATED TO DIGITAL INFRA

Active infrastructure specialists

**100+**  
Dedicated  
Digital Infrastructure  
Investment  
Professionals

## EXECUTIVE LEADERSHIP



**Marc Ganzi**  
Chief Executive Officer



**Ben Jenkins**  
President and CIO



**Jacky Wu**  
Chief Financial Officer



**Liam Stewart**  
Chief Operating Officer

## GLOBAL DIGITAL INVESTMENT & ASSET MANAGEMENT TEAM



**Jon Mauck**  
Senior Managing Director



**Steven Sonnenstein**  
Senior Managing Director



**Jeff Ginsberg**  
Managing Director & CAO



**Kevin Smithen**  
Chief Commercial & Strategy Officer



**Tom Yanagi**  
Managing Director



**Peter Hopper**  
Managing Director



**Dean Criares**  
Managing Director  
Digital Private Credit



**Matt Evans**  
Managing Director,  
Head of Europe



**Justin Chang**  
Managing Director  
Head of Asia



**Leslie Golden**  
Managing Director  
Global Head of Capital  
Formation and Investor Relations



**Warren Roll**  
Managing Director



**Genevieve Maltais-Boisvert**  
Managing Director



**Geoff Goldschein**  
Managing Director,  
General Counsel



**Sadiq Malik**  
Managing Director



**Rommel Marseille**  
Managing Director  
Head of North American  
Capital Formation



**Bernardo Vargas Gibsons**  
Managing Director  
Head of Latin America



**James Burke**  
Principal



**Tae Ahn**  
Managing Director  
Head Asia Capital Formation



**William Hughes, III**  
Managing Director  
Liquid Strategies



**Alexandre Villela**  
Senior Vice President  
Ventures



**Alan Bezosa**  
Senior Vice President  
Liquid Strategies



**Christopher Falzon**  
Managing Director  
North America Capital  
Formation



**Scott McBride**  
Principal



**Hayden Boucher**  
Principal



**Chae Hart**  
Principal



**Manjari Govada**  
Principal



**Wilson Chung**  
Principal



**Sonia Kim**  
Chief Accounting  
Officer



**Kay Papanoniou**  
Managing Director,  
Global Head of HR



**Ron Sanders**  
Chief Legal Officer  
& Secretary



**Kristen Whealon**  
Interim Chief  
Compliance Officer



**Severin White**  
Head of Public  
Investor Relations



**Jonathan Adelstein**  
Managing Director,  
Head of Global Policy  
and Public Investment



**Matty Yohannan**  
Chief of Staff

## OPERATIONS, IT, FINANCE & COMPLIANCE

## GLOBAL INDUSTRY LEADERS & LOCAL EXPERTS

### DATA CENTER TEAM

#### NORTH AMERICA

**Sureeh Choksi**  
Senior Advisor  
Board Member of Zayo & Scala;  
President and CEO of Vantage

**Brokaw Price**  
Operating Partner

**Raul Martynek**  
Senior Advisor  
CEO of DataBank

**JP Rosato**  
Operating Partner

#### SOUTH AMERICA

**Marcos Peigo**  
Senior Advisor  
CEO of Scala Data  
Centers

#### GLOBAL

**Michael Foust**  
Senior Advisor  
Chairman of Databank  
& Vantage

#### EUROPE

**Josh Joshi**  
Operating Partner  
Chairman of AtlasEdge

**Giuliano Di Vitantonio**  
Senior Advisor  
CEO of AtlasEdge

### TOWER TEAM

#### NORTH AMERICA

**Alex Gellman**  
Senior Advisor  
Board Member of Highline  
and FreshWave; CEO of  
Vertical Bridge

**Tim Brazy**  
Senior Advisor  
CEO of Landmark Dividend

#### EUROPE

**Graham Payne**  
Senior Advisor  
Executive Chairman  
of Freshwave

#### ASIA

**Suresh Sidu**  
Senior Advisor  
CEO of EdgePoint

#### SOUTH AMERICA

**Daniel Seiner**  
Senior Advisor  
CEO of Andean Telecom Partners

**Jose Sola**  
Senior Advisor  
CEO of Mexico Tower Partners

**Fernando Viotti**  
Senior Advisor  
CEO of Highline

### FIBER & SMALL CELLS TEAM

#### NORTH AMERICA

**Michael Finley**  
Senior Advisor  
CEO of Boingo

**Richard Coyle**  
Senior Advisor  
CEO of ExteNet Systems

**Steve Smith**  
Senior Advisor  
CEO of Zayo Group

**David Pistacchio**  
Operating Partner  
Chairman of Beanfield;  
Board Member of Aptom  
and Zayo

**Dan Armstrong**  
Senior Advisor  
CEO of Beanfield  
Technologies

**Murray Case**  
Operating Partner  
Chairman of Scala  
Data Centers

# WE ARE BUSINESS BUILDERS EXECUTING PLAYBOOKS THAT HAVE SERVED OUR INVESTORS THROUGH MARKET CYCLES



Particularly during periods of market dislocation our operating DNA sets us apart...this is where we thrive!

1

## PHASE 1: ESTABLISH PLATFORM



Identify and acquire the right platform and team to capitalize on unique digital infrastructure opportunities

2

## PHASE 2: TRANSFORM AND SCALE



Pair capital and operating expertise with the right strategic business plan built around both greenfield and strategic M&A – Build & Buy

3

## PHASE 3: FOLLOW THE LOGOS

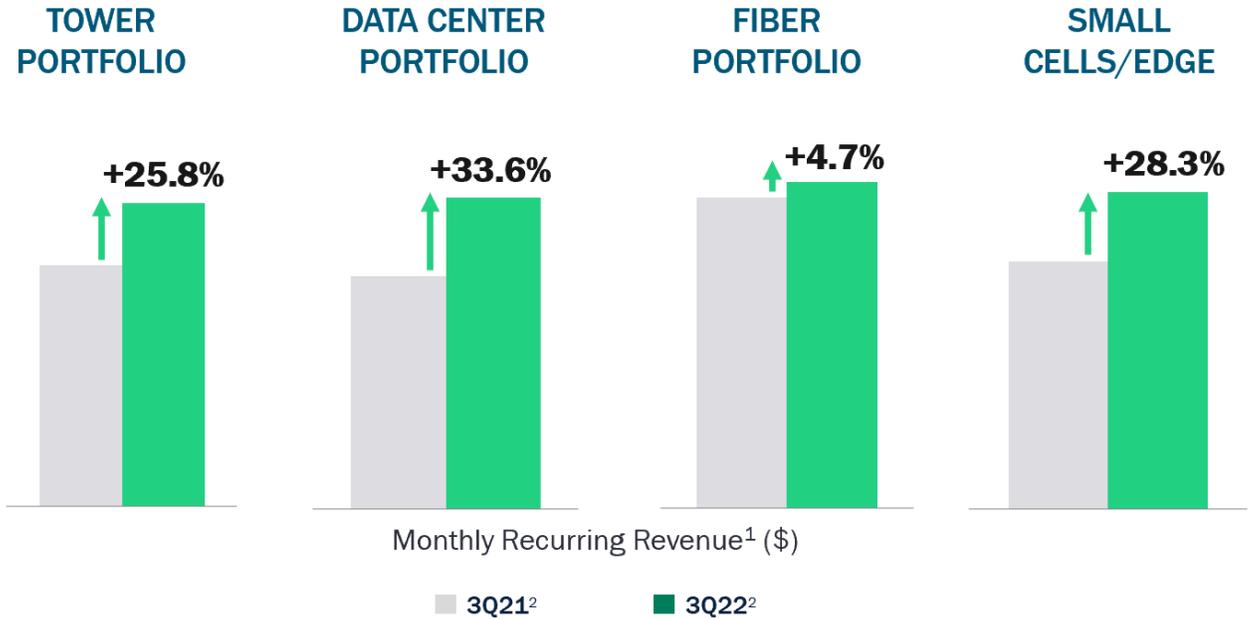


Customer-driven investment framework that allocates capital and resources to support network growth

The **DigitalBridge Platform Strategy** leverages playbooks to extend the global-reach businesses growing EBITDA through portfolio expansion

# STRONG ASSET MANAGEMENT THROUGH THE CYCLE...KEEP DELIVERING

Our ability to deliver great performance across our global portfolio is the most fundamental driver of our business...



## STAY FOCUSED ON THE CONTROL VARIABLES IN OUR BUSINESSES

(1) We define monthly recurring revenue as recurring contractual revenue, including rental, power, and interconnection revenue and operating expense reimbursement, under existing commenced customer leases.  
 (2) Includes portfolio companies listed above and excludes companies acquired during the 3rd quarter or for which comparable data was not yet available.

## WE BENEFIT FROM CONSERVATIVE PORTFOLIO DEBT METRICS

- Loan to Value **41%**<sup>3</sup>
- % Fixed **75%**<sup>4</sup>
- Average Fully Extended Term Maturity Profile **8.0 yrs**<sup>4,5</sup>

(3) As of 9/30/22  
 (4) As of 6/30/22  
 (5) Maximum weighted average maturity date, including full term out of securitizations

# STRONG PORTFOLIO PERFORMANCE DRIVES GREAT OUTCOMES

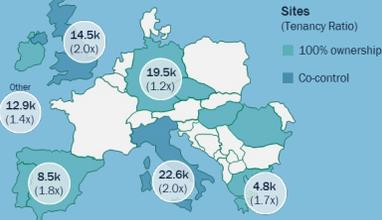
In 2022, despite rising rates and an inflationary environment, DigitalBridge delivered for investors, generating realizations at attractive valuations, in excess of our carrying values



## FULL REALIZATION

Exit Date: November 2022

**83,100** Total Macro Sites



**10** Markets served

**+33%**  
Premium to IPO price



## FULL REALIZATION

Exit Date: September 2022

**2,952** Total panels



**3** Markets served

**+42%**  
Premium to 1Q22 Valuation



## RECAPITALIZATION

Majority Exit Date: June 2022

**69** Data centers



**26** Edge U.S. markets served

**2.0x**  
MOIC for DBRG shareholders

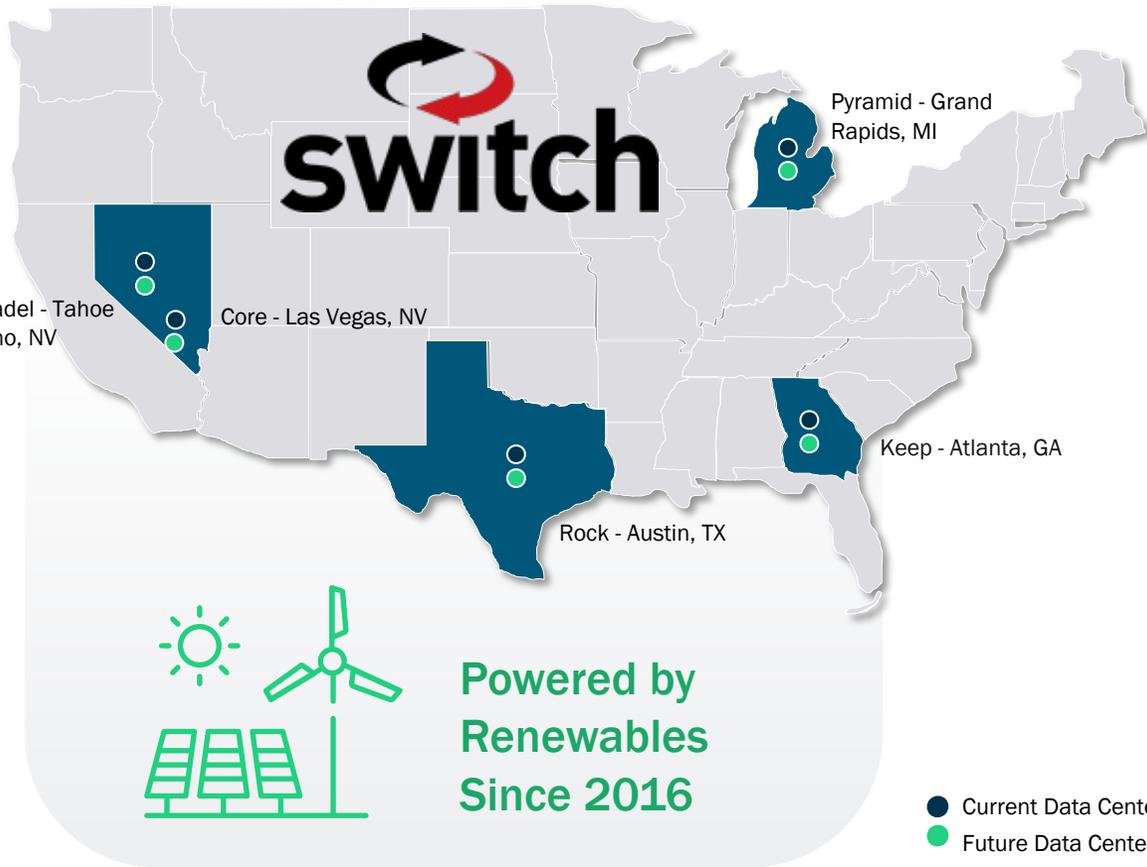
**+34%**  
Premium to 1Q22 Valuation

# 2

## CASE STUDY SWITCH - OUR NEWEST PLATFORM, POISED TO SCALE

# SWITCH OVERVIEW

Switch Provides the High Quality DCs to Support Enterprise and Private Cloud



## 500MW

In place capacity

## Significant Runway

Expansion capacity of 11.2M sqf, 1GW of Potential

## Specialized Strategy

Patented facility design, unique network core Strategy

## 100% Renewable Energy

Customer and Investor Priority

## 0% Downtime Since Inception

Industry leading downtime with higher levels of redundancy and backup

# INVESTMENT THESIS: WHAT DID WE SEE?

DigitalBridge identified significant upside in Switch as part of the DBRG ecosystem

## Private Cloud Requires The Highest Quality Infrastructure

- Proprietary design provides unmatched uptime – Zero Downtime
- Lower TCO through lower cost markets and aggregated purchasing for power and network capacity

## Enterprises Are Rapidly Scaling Their Outsourcing

- Current macro conditions accelerating the decision to outsource,
- High quality, sticky customer base, industry leading churn stats
- Helping enterprises meet their ESG goals. 100% renewable

## Monetizable Power And Space Strategy

- Scaled footprint with secured expansion capacity that more than doubles the current footprint
- Strong interconnection fabric and unique network consortium creates a barrier to entry and customer retention

## Experienced Management Team

- Experienced management team with a track-record of growth
- Strong conviction in DBRG's investment

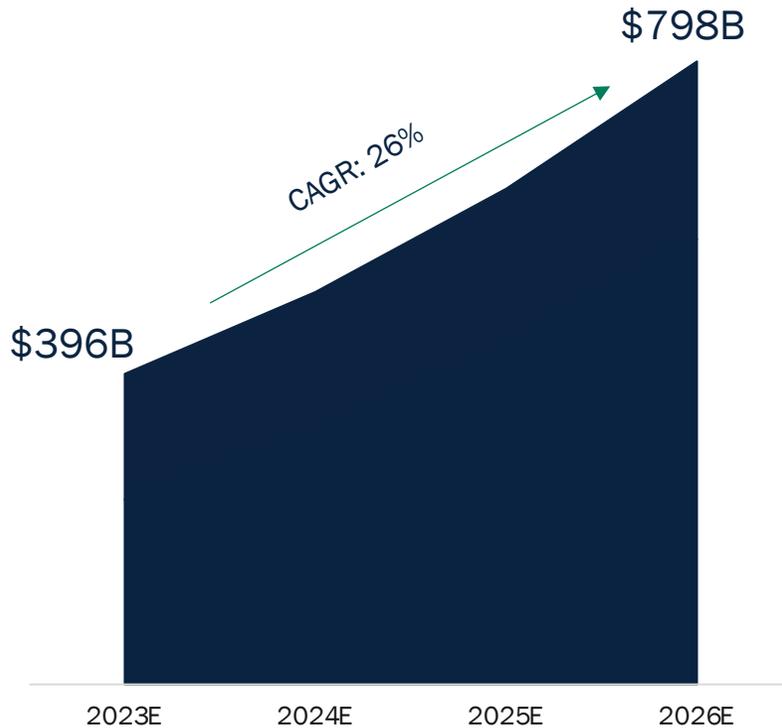
# COMPELLING INVESTMENT BACKDROP



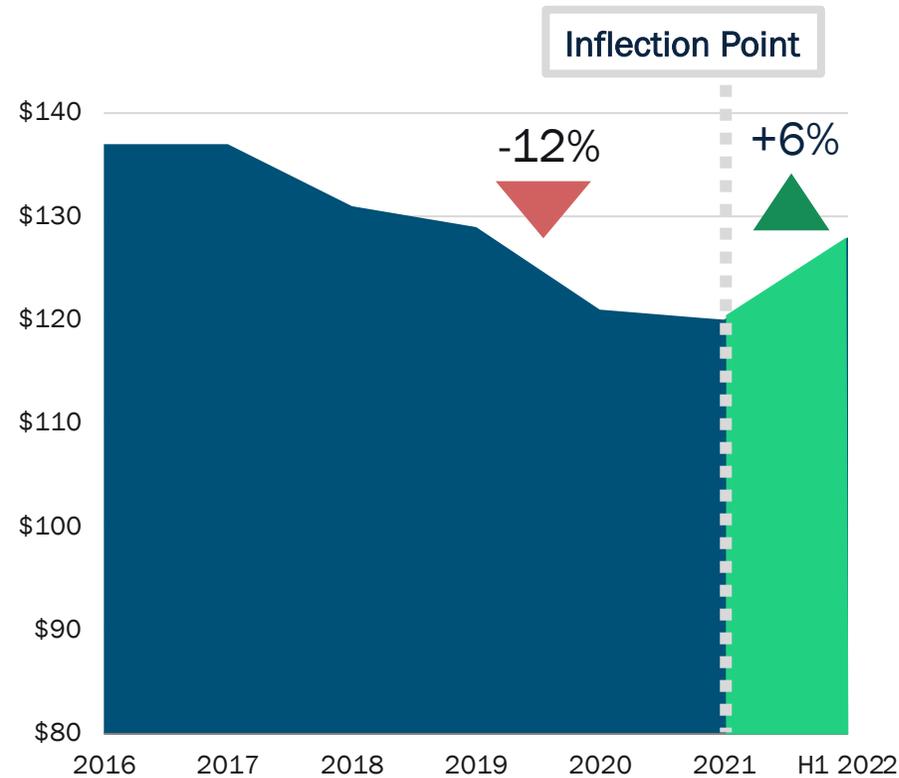
Combination of strong demand outlook, a pricing environment that is inflecting higher, and a massive runway for growth position Switch to succeed

## STRONG FORECASTED GROWTH

Global Data Infrastructure Revenue<sup>(1)</sup>  
(\$ in Billions)



## PRICING HAS INFLECTED HIGHER<sup>(2)</sup>



## SIGNIFICANT RUNWAY<sup>(3)</sup>

(in Millions of Square Feet)

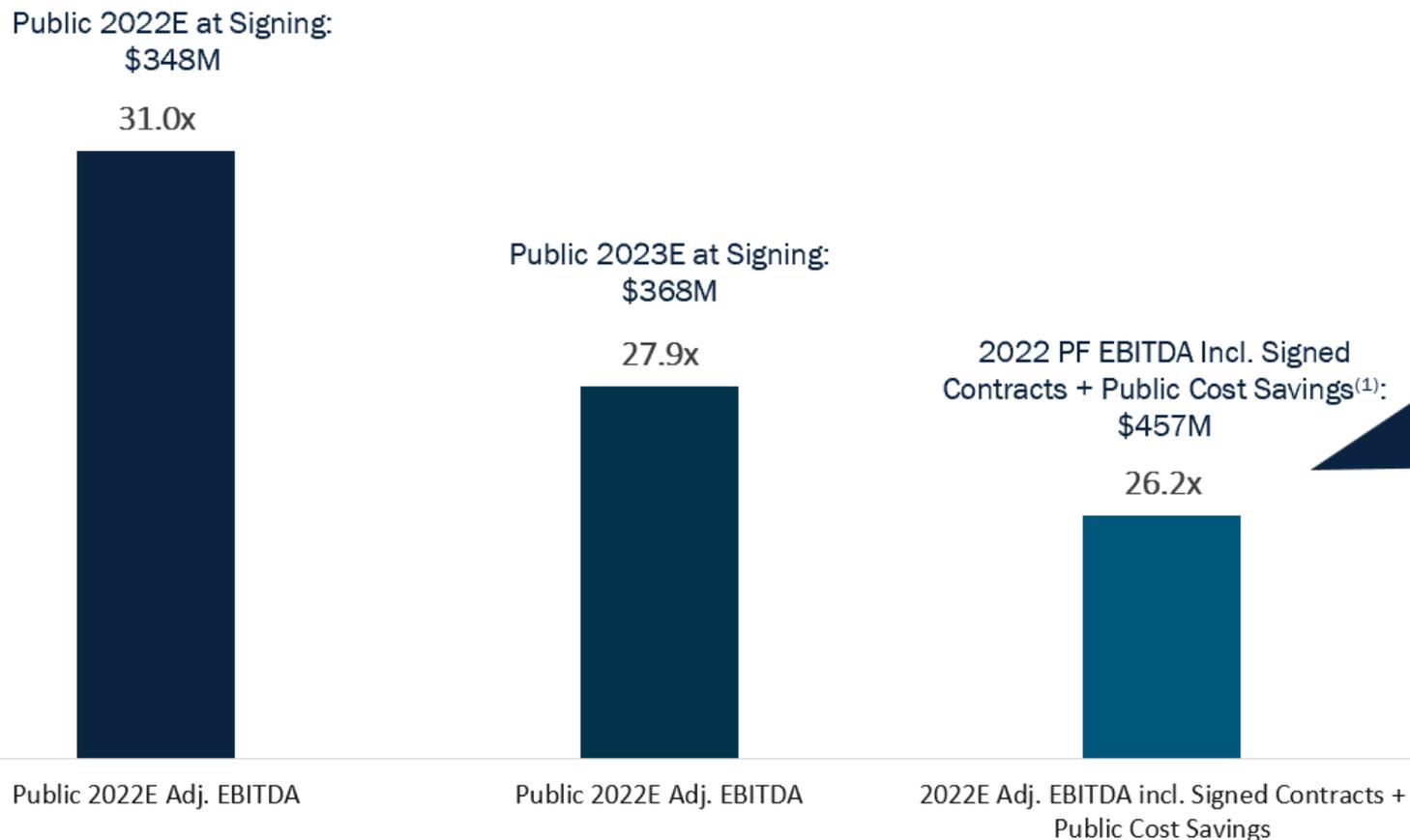


■ Current Gross Capacity ■ Additional Capacity

- Source: Cowen and Company Research Report, data as of December 2021, Altman Solon Market Research & Analysis
- Source: Cowen and Company Research Report. CBRE North American Data Center Trend H1 2022; Average monthly asking rate for a 250-500kW requirement across primary markets, which includes Northern Virginia, Dallas, Silicon Valley, Chicago, Phoenix, New York Tri-State and Atlanta
- There can be no assurance Switch will achieve growth.
- Represents the aggregate Gross Available and Additional Capacity for CoreSite, CyrusOne and QTS at the time of their respective acquisitions

# ORGANIC BOOKINGS DRIVE VALUE CREATION

Since we agreed to acquire Switch, they have already sold through our 2022-24 underwriting plans, reducing the effective multiple by 5 turns. With a big land and power runway in place, development yields are highly accretive to value



## INDUSTRY LEADING DEVELOPMENT YIELD AT STABILIZATION

**>15%**  
ROIC

~\$70M  
CapEx per Data Hall

>\$21M  
Annual Revenue per Sector

>\$12.5M  
Annual Cash Flow / Sector

Example assumes 90% billed utilization. Return on Invested Capital for a single sector is defined as Adjusted EBITDA less maintenance Capex/total gross PP&E

# WE'VE DONE THIS BEFORE: VANTAGE - A LEADING GLOBAL HYPERSCALE PLATFORM

After partnering with DigitalBridge, Vantage has built a state-of-the-art data center platform serving hyperscalers, cloud providers and large enterprises across 17 markets globally



2016

2022



**2**

US Markets Served

**3**

Campuses

**66 MW**

In-Place Capacity

**~7x**

EBITDA Growth

**5**

Continents

**25**

Campuses

**1.5+ GW**

Potential Capacity

# 3

## AN EVOLVING DATA CENTER ECOSYSTEM

# WHAT IS TOP OF MIND FOR DATA CENTER COMPANIES?

Cloud applications, growing enterprise outsourcing and the accelerating pace of data creation are creating substantial storage and computing demand that cannot be met by today's global infrastructure

## GLOBAL THEMES IN 2023

### SHORT TERM / TACTICAL



Impact of Macro Conditions on Supply and Demand

- Interest Rates
- Inflation
- Supply Chain
- Power Costs



Increasing complexity of the cloud requiring hybrid solutions approach

- Time to market
- Interconnect



Increased demand for latency-sensitive data is driving Edge growth

- International Expansion
- Data Sovereignty



Explosive growth of data and internet traffic driving record demand

- Security
- Customer Experience
- Scale Matters



Energy constraints and enhanced focus on ESG considerations

- Access to Renewables

# HOW DIGITALBRIDGE MEETS THE SECTOR CHALLENGES – DEMAND ECO-SYSTEM EXPLAINED

New data center types are emerging to serve the growing demands of new applications and services; DigitalBridge has built exposure to the fastest growing segments of the market

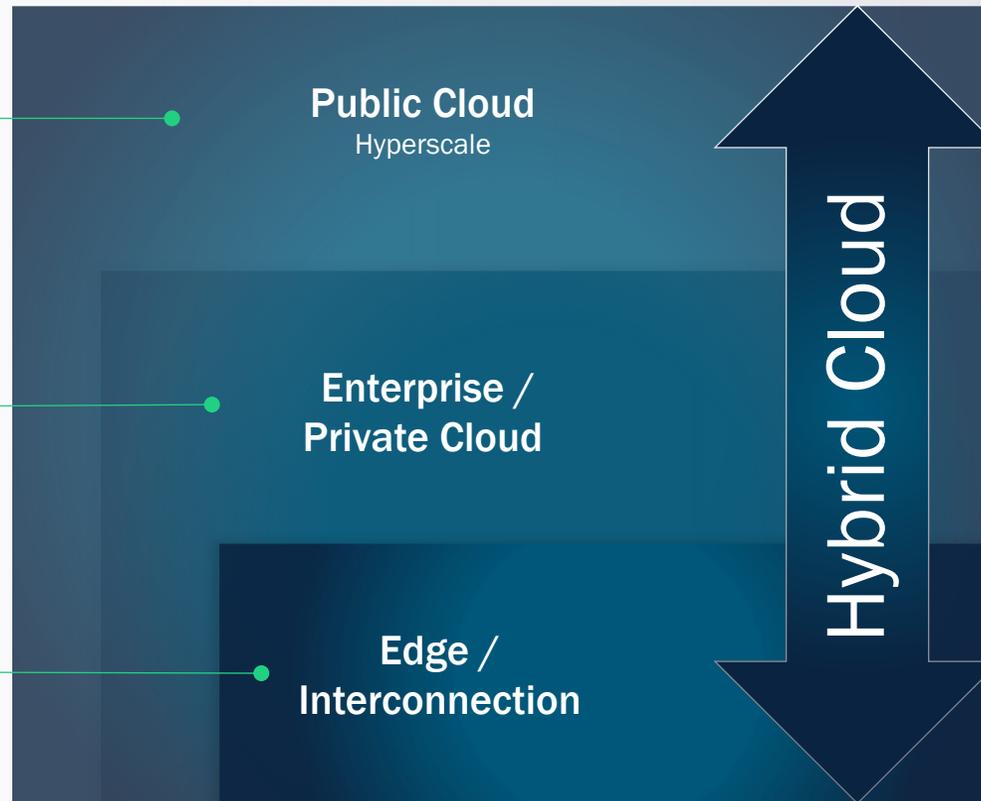
Providing campus solutions to address cloud Availability Zones expansion



Outsourcing of mission-critical workloads for large / Fortune 1000 companies



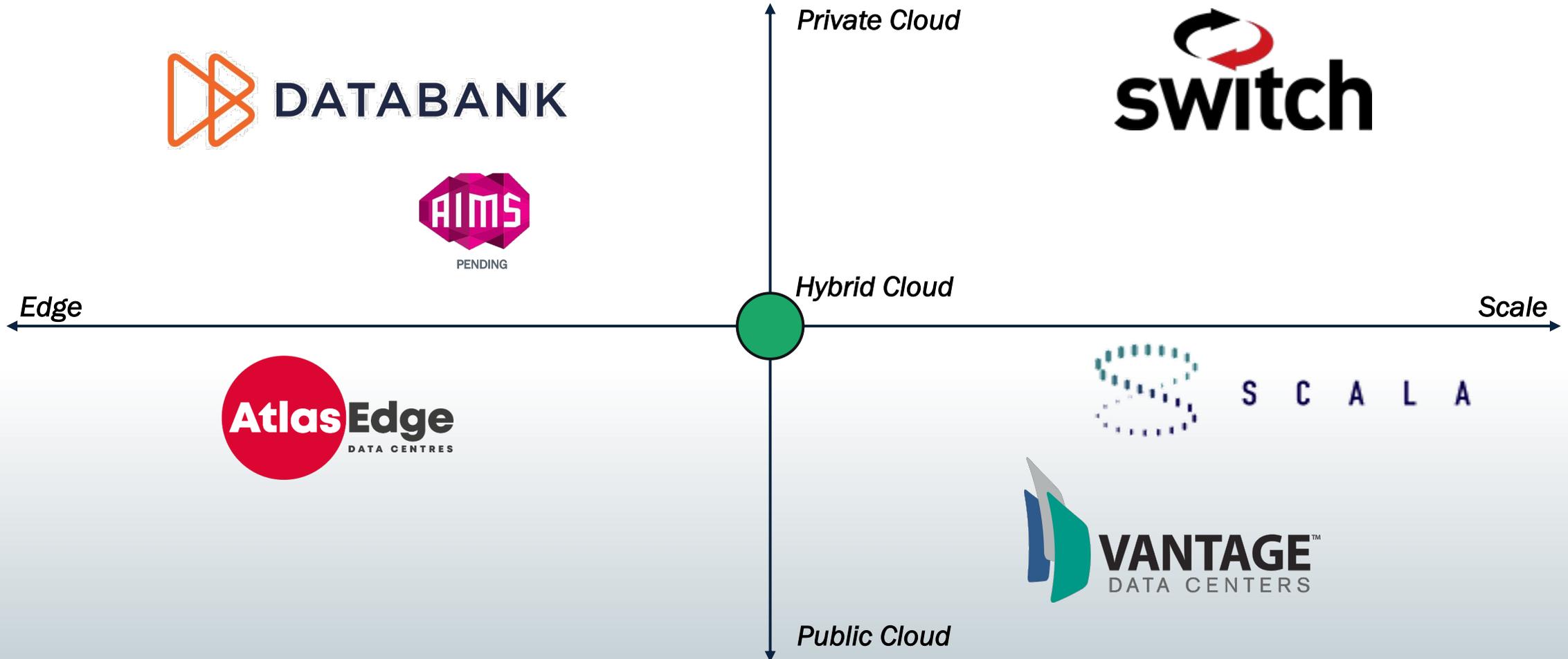
Low-latency and distributed applications & services for cloud and enterprises



Global Hyperscalers		
Enterprise Applications		
Content Distribution		

# ESTABLISHING A NEW, COMPLEMENTARY PLATFORM IN DBRG'S ECOSYSTEM

Our Data Center strategy is built to serve not only specific sectors but an integrated hybrid cloud offering



# GLOBAL CONNECTIVITY

DigitalBridge is ready and capable to meet the growing demand for global connectivity through our presence in primary digital infrastructure platforms of data centers, towers, fiber networks, small cell networks and edge infrastructures.

## ~52 billion

Total Number of Connected Devices in 2025

McKinsey Technology Trends Outlook 2022

## ~\$400 billion

Annual global capex investment to meet digital infrastructure demand

Credit Suisse, Dell'Oro GSMA The Global Mobile Economy 2021-2022 and estimates

FUTURE OF MOBILITY



IMMERSIVE REALITY TECHNOLOGIES



SMART MANUFACTURING





DIGITALBRIDGE