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Leader in commercial energy storage

Largest Market Share

More SGIP sites installed than all other providers combined

175+ Systems Operational

Working with 30% of Fortune 500

Most Project Finance

Largest, most innovative funds

$350M+ (6x nearest competitor)

Most Utility Contracts

Hawaiian Electric · SOUTHERN CALIFORNIA EDISON · SMUD · SDG&E

Wholesale Market Leader

1st in Real-Time & Day-Ahead

100+ bids, 100% execution

High Caliber Investors

ANGELENO GROUP · Constellation · GE · IBERDROLA · MITSUI&CO. · TOTAL · RWE

Distinguished Awards

WORLD ECONOMIC FORUM · Bloomberg WINNER · GRID EDGE 20 · 2014 Global Cleantech 100 · RED HERRING 100 FINALIST N. AMERICA · ENERGY EXCELERATOR

Premium Partners

STARWOOD CAPITAL GROUP · KYOCERA · Constellation · Johnson Controls · enbala POWER NETWORKS · Lend Lease · SUNPOWER

Thought Leader

National and industry press

Frequent analyst coverage

500M+ media impressions YTD

Customer Examples

- **+170 installations, over 1.5 million run time hours, $350MM in project finance**
- More installations under CA's SGIP program than all other providers combined
- Delivering demand charge savings and demand response revenues automatically
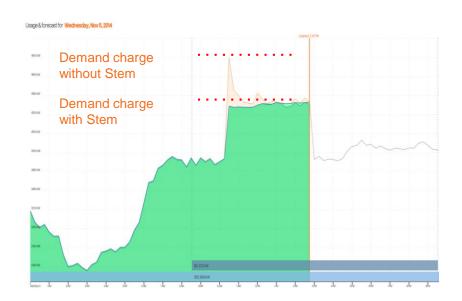
The Stem system

Stem combines big data, predictive software and advanced energy storage, simultaneously helping businesses better manage electric costs while enhancing grid operations.

PowerStore.
Stores and releases energy using an on-site battery system.

PowerMonitor.
Captures data on real-time energy consumption.

PowerScope.
Enables a comprehensive view into past, current, and future energy use.

Customer | Storage + predictive software

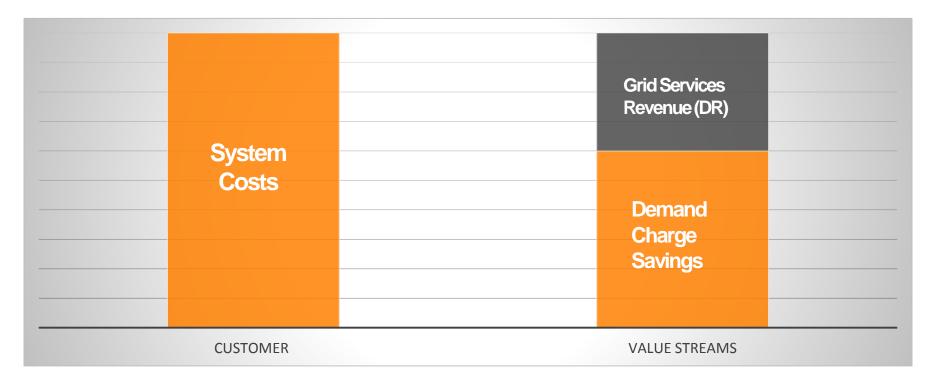Stores and deploys automatically to maximize returns using predictive analytics

PowerScope software increases savings with real-time visibility and alerts

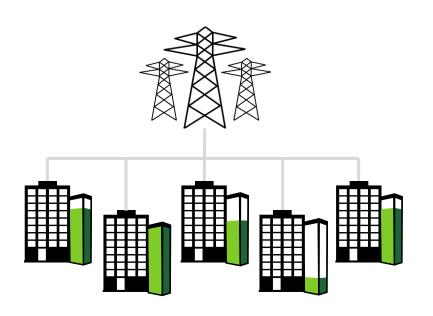# Customer | Economic Value

Stem serves two audiences

Commercial & Industrial Customers

Automated energy storage maximizes savings while powerful predictive software platform adds unparalleled visibility into operations.

Utilities, ISOs and Retailers

When aggregated, delivers grid services as a cost-competitive, flexible capacity resource, and demand response-enabling technology.

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Grid | On demand resource

Aggregation acts as a virtual power plant for grid operators during periods of high demand

- Utility contract guarantees reduction or capacity

- Predictive software selects storage systems with spare capacity

- Aggregated fleet of systems creates a generation-like resource for the utility

- Unlocks additional customer value by accessing additional value streams

Grid | Fleet value streams

Stem is delivering grid services today while laying the foundation for additional distributed storage applications of the future.

- Delivers capacity where and when needed

- Regulates frequency w/in tolerance bounds

- Renewable integration with volt/VAR support

- Visibility behind the customer meter

Hawaiian Electric — Addressing high penetrations of renewables by providing capacity and enhanced grid visibility

SOUTHERN CALIFORNIA EDISON — Delivering an extraordinarily controllable capacity asset through DR in highly congested regions

SDGE — Providing system resource adequacy combined with day-head market integration through storage-based DR

SMUD — Firming PV volatility through enhanced distribution line and customer building visibility to support volt/VAR optimization

California ISO Shaping a Renewed Future — First customer-sited storage provider to aggregate customers for day-ahead and real-time market

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energy + insight when it matters most

Thank you

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