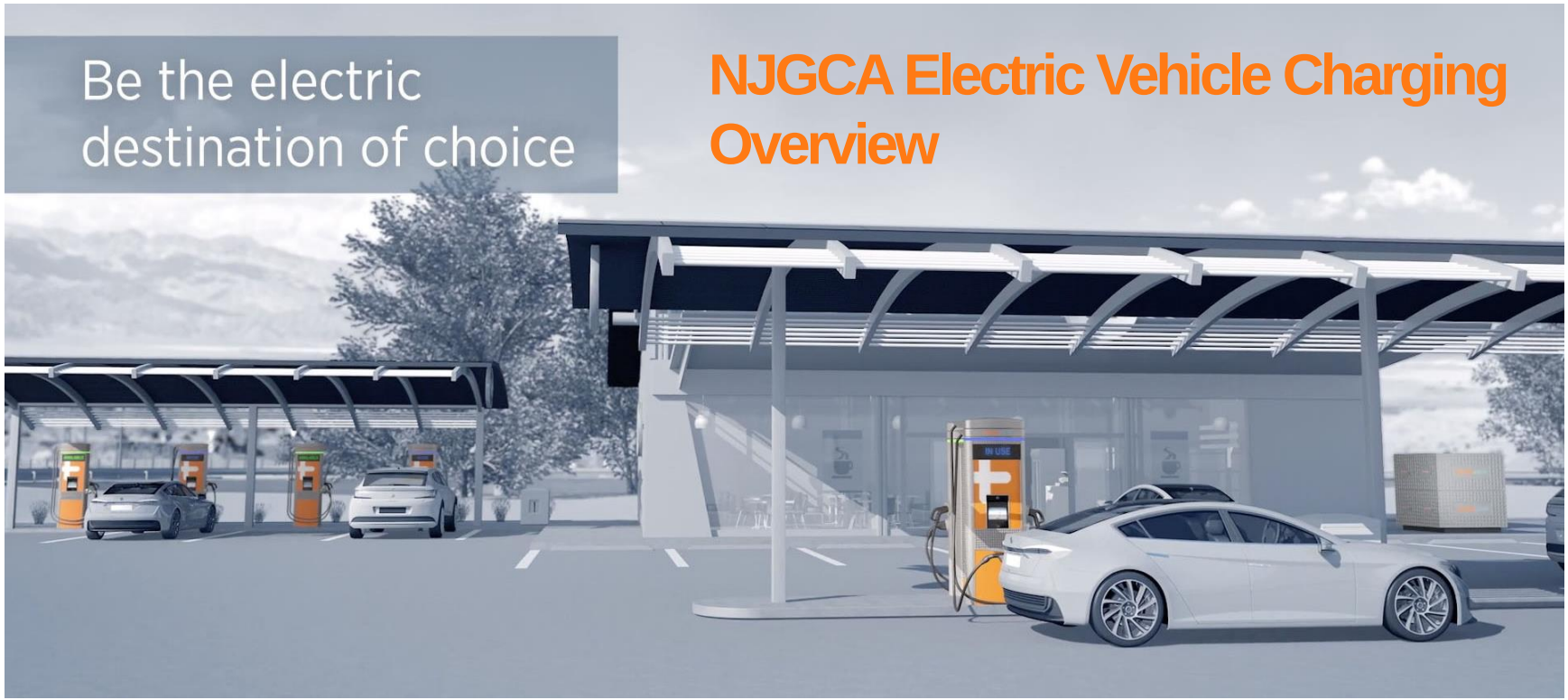

NJGCA House Keeping Slide

- **Please make sure your line is muted**
- For technical problems, please email Michelle Horowitz Jackson at michelle@njgca.org
- Enter questions in the **chat box** of your dashboard
- If your question is not answered today, please email michelle@njgca.org

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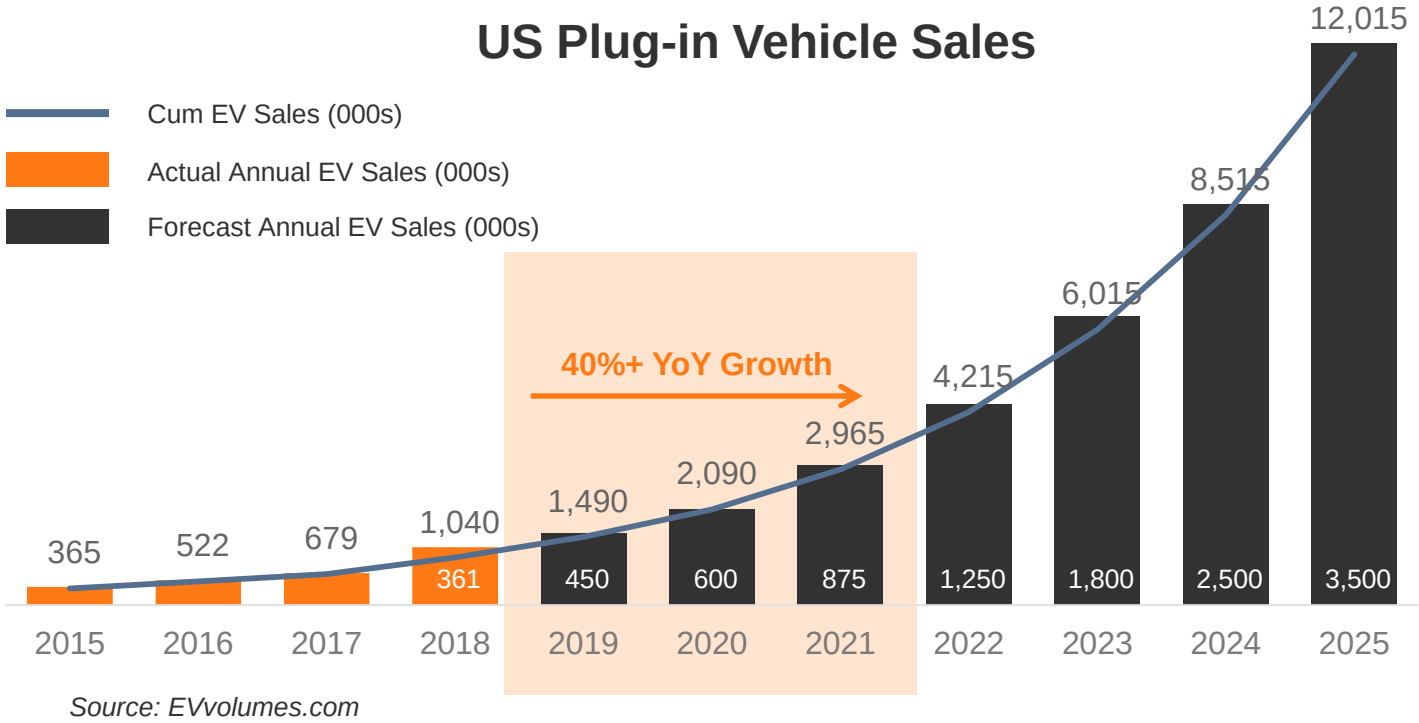
The Future of Mobility Is Electric

More drivers are choosing electric

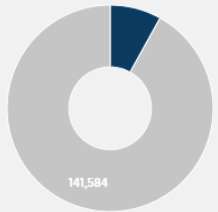


Source: EVvolumes.com

North Eastern State ZEV 2025 Minimum Requirements

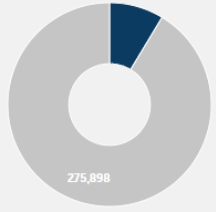
CT

To date, Connecticut's progress toward meeting the 2025 ZEV sales requirement has reached 8.1%.



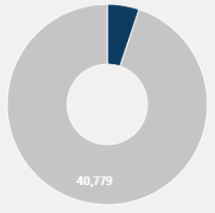
MA

To date, Massachusetts's progress toward meeting the 2025 ZEV sales requirement has reached 8.6%.



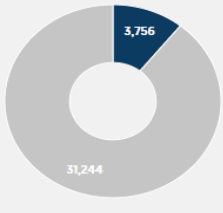
RI

To date, Rhode Island's progress toward meeting the 2025 ZEV sales requirement has reached 5.2%.



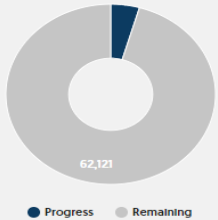
VT

To date, Vermont's progress toward meeting the 2025 ZEV sales requirement has reached 11%.



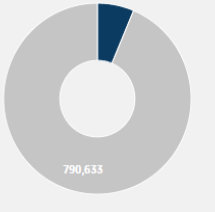
ME

To date, Maine's progress toward meeting the 2025 ZEV sales requirement has reached 4.4%.



NY

To date, New York's progress toward meeting the 2025 ZEV sales requirement has reached 6.3%.



New Jersey is Poised to Lead US Electrification

New Jersey aims for 330k registered zero-emission vehicles by 2025, looks to become an East Coast EV leader

Phil Dzikiy - Jun. 5th 2019 2:08 pm ET @phildzikiy

- Not including Tesla
- 330,000 vehicles is an anticipated minimum expectations
- 2035: Murphy administration recommendation of 100% of cars electric – NJ DEP
- Factors expediting this goal
  - Auto manufacturer electrification
  - State policies
  - City permitting requirements
  - Ride-sharing/taxis
  - Company goals
  - Consumer experience

The Biggest Electrification Experiment Evidence - Tesla

- In early market (2015), Tesla saw minimal charging
- Tesla sees 1,000-4,000 sessions monthly (2020)
- Universal vehicle vs Tesla vehicle BEV market is about to flip (due to sheer volume of other manufacturers
- 400 new electric models models by 2024

The automotive industry is moving to electric

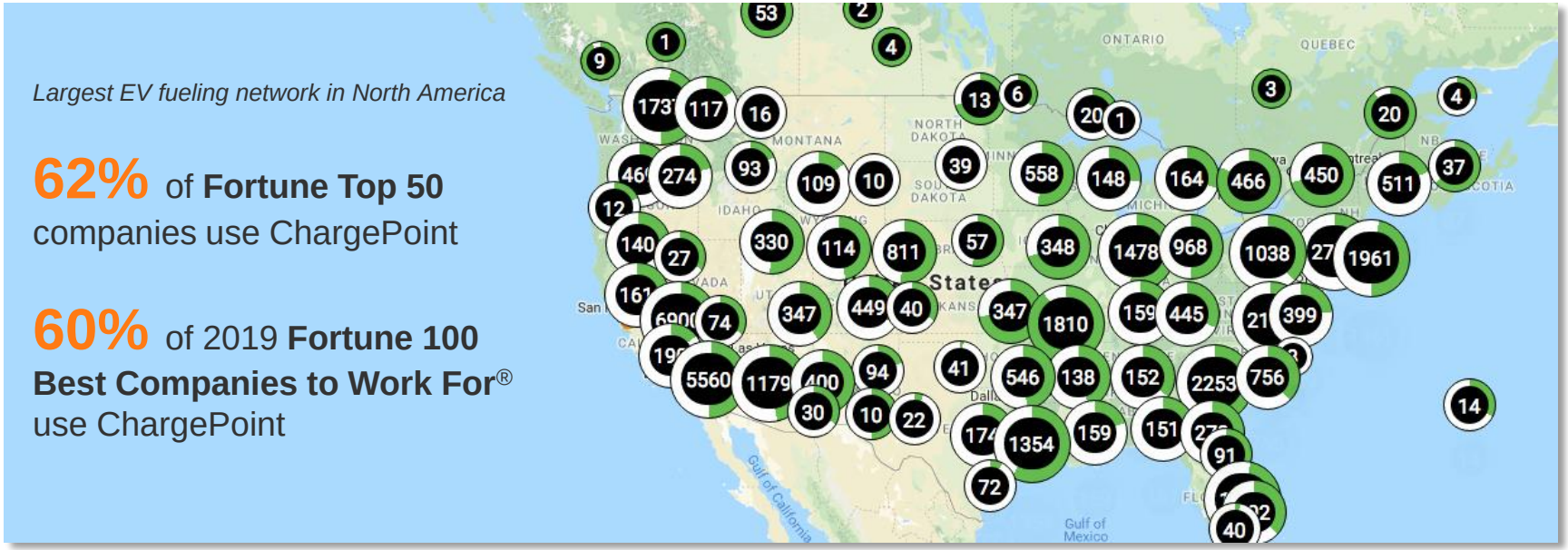
- Double Model 3 production and reveal the Model Y this year
- 20 all-electric cars by 2023
- 30 BEV and PHEV models by 2025
- 10+ new all-electric vehicles by 2022 and plans to electrify entire Mercedes-Benz portfolio
- 44 electrified Hyundai/Kia/Genesis models by 2025
- 16 fully electric vehicles and 40 electrified vehicles through 2022
- First all-electric compact SUV (Macan) and third EV after Taycan and Cross Turimo (planned for 2019, 2020)
- Every Jaguar and Land Rover launched from 2020 will be electrified
- Almost 70 new electric models by 2028
- 50% of Volvo Cars' sales volume to be fully electric by 2025 and plans a hybrid or full-electric powertrain for all models

Who is ChargePoint?

Largest EV fueling network in North America

62% of **Fortune Top 50** companies use ChargePoint

60% of 2019 **Fortune 100 Best Companies to Work For®** use ChargePoint



Every 2 secs
A driver plugs into ChargePoint

67,000+
Public / Semi-Public / Commercial Ports

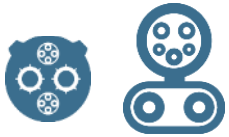
1,278+
DC Ports

1 Billion+
Electric miles have been driven on the ChargePoint network

www.fortune.com/fortune500/list/

www.greatplacetowork.com/best-workplaces/100-best/2019

EV Charging Basics

	 Level 1	 Level 2	 DC Fast
Electrical Specs	110 – 120 Volts AC 12 – 16 Amps (home appliance)	208/240 Volts AC 32 Amps (home washer/dryer, commercial standard)	208 to 480 Volts DC 70 – 125 Amps (commercial standard)
Range Per Hour of Charging	~3 – 5 miles	~12 – 25 miles	100 - 200 miles +
Typical Time for Full Charge[1]	18+ hours	~2 - 4 hours	~15 - 45 mins

Not practical for today's EV batteries and driver expectations

Align with charging at home, around town, and between towns

Full Range Hardware Portfolio

Residential and Commercial – AC

Home
7 kW

CPF25 7 kW **CPF32** 7.4 kW

CT4000
7 kW

CP4100
22 kW

CP4300
22 kW

Commercial – DC

CPE250
62.5 kW

Express Plus
500 kW

First EV charging stations to be ENERGY STAR® certified

Modular approach simplifies service and repairs, minimizing down-time

The New Fueling Network

Reduce Expenses and Generate Direct & Indirect Income

Home

GAIN GREATER CONTROL & VISIBILITY

+ Track usage and expenses
+ Charge during off-peak hours
+ Achieve sustainability goals

Fleet

LOWER COST OF TRANSPORTATION

+ Meet government mandates and regulations
+ Reduce operating expenses with lower fueling and maintenance costs
+ Achieve sustainability goals
+ Proactively manage expenses
+ Manage power in a grid-friendly way

Workplace

ATTRACT & RETAIN TALENT

+ Increase employee satisfaction
+ Improve productivity
+ Achieve sustainability goals
+ Provide pricing controls to support your business goals

Multi-Family Homes / Commercial Property

ATTRACT & RETAIN RESIDENTS & TENANTS

+ Increase average rent and property value
+ Provide valued amenity
+ Meet emerging state and city regulations
+ Achieve sustainability goals

Parking

ATTRACT NEW CUSTOMERS

+ Drive revenue
+ Provide differentiating amenity

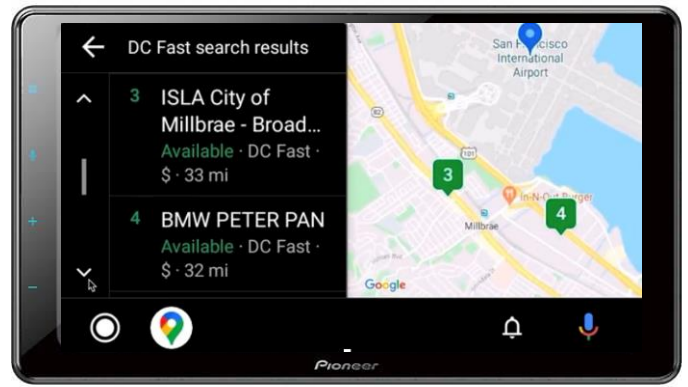
Retail & Hospitality

INCREASE SALES

+ Attract new and repeat customers
+ Increase shopping time
+ Boost customer satisfaction
+ Achieve sustainability goals
+ Integrate with loyalty programs

In-Vehicle Experience

- Automakers have been integrating ChargePoint station information since 2012
- Drivers benefit from Google Maps & Apple Car Play Integration
- Apple iOS14 update integrates ChargePoint



Charging is Part of the 21st Century Fueling Market

- Emerging customer base of EV drivers are looking for charging convenience stores and transportation fueling locations
- Easily adaptable to current operations
- Highly flexible technology tailored to individual sites, controllable locally or regionally
- Puts the next generation of fueling in the hands of the market's leading providers

Fueling Station Examples

The Business Case for DCFC Ownership

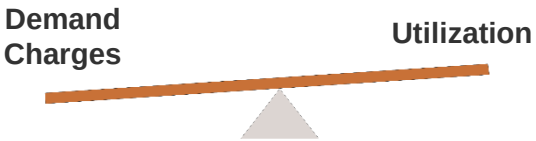
- Help potential customers understand economics of owning EV charging

- Main levers:
  - Equipment and install costs
  - Electricity costs:
    (energy and demand charges)
  - Driver revenue: Utilization

EV Charging Business Model

Model Output

2020 Utilization		5 Year Utilization and Yield				7 Year Utilization and Yield				10 Year Utilization and Yield			
Sessions / Day/Site	Sessions/Day/ Port	Sessions / Day/Site	Sessions / Day/Port	NPV	IRR	Sessions / Day/Site	Sessions / Day/Port	NPV	IRR	Sessions / Day/Site	Sessions / Day/Port	NPV	IRR
3.0	1.5	15.2	7.6	$ (48,239)	-20%	24.1	12.1	$ (6,415)	3%	24.1	12.1	$ 54,240	15%
4.0	2.0	20.2	10.1	$ (32,056)	-11%	24.1	12.1	$ 11,705	8%	24.1	12.1	$ 72,360	18%
5.0	2.5	24.1	12.1	$ (17,014)	-3%	24.1	12.1	$ 26,746	13%	24.1	12.1	$ 87,401	22%
6.0	3.0	24.1	12.1	$ (5,894)	2%	24.1	12.1	$ 37,866	17%	24.1	12.1	$ 98,522	25%
7.0	3.5	24.1	12.1	$ 5,103	8%	24.1	12.1	$ 48,863	21%	24.1	12.1	$ 109,518	28%
8.0	4.0	24.1	12.1	$ 12,579	11%	24.1	12.1	$ 56,339	24%	24.1	12.1	$ 116,994	30%



Example New Jersey Location

Site: 4 CPE250 DC Fast Chargers

Utility: Jersey Central Power and Light

Model Output

2020 Utilization		5 Year Utilization and Yield				7 Year Utilization and Yield				10 Year Utilization and Yield			
Sessions / Day/Site	Sessions/Day/ Port	Sessions / Day/Site	Sessions / Day/Port	NPV	IRR	Sessions / Day/Site	Sessions / Day/Port	NPV	IRR	Sessions / Day/Site	Sessions / Day/Port	NPV	IRR
1.0	0.3	3.5	0.9	$ (301,258)	#NUM!	6.3	1.6	$ (320,452)	#NUM!	14.7	3.7	$ (289,609)	-22%
4.0	1.0	14.0	3.5	$ (185,586)	-26%	25.3	6.3	$ (85,392)	-3%	31.7	7.9	$ 146,968	12%
8.0	2.0	28.1	7.0	$ (31,356)	1%	31.7	7.9	$ 138,766	17%	31.7	7.9	$ 371,126	25%
12.0	3.0	31.7	7.9	$ 83,476	16%	31.7	7.9	$ 253,598	28%	31.7	7.9	$ 485,958	34%
16.0	4.0	34.9	8.7	$ 128,696	23%	34.9	8.7	$ 302,193	33%	34.9	8.7	$ 539,036	39%
20.0	5.0	31.7	7.9	$ 183,591	33%	31.7	7.9	$ 353,712	42%	31.7	7.9	$ 586,072	46%

Net Profit		**$ 15,191**	**$ 34,808**	**$ 54,709**	**$ 86,463**	**$ 114,771**	**$ 115,713**	**$ 117,880**	**$ 117,880**	**$ 117,880**	**$ 124,752**		

Questions?

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Ryan Bakely: ryan.bakely@chargepoint.com

See you next week! December 9th at 2 PM