

Think Singapore equities are boring?





It offers AI exposure in different forms.

Singapore's strong AI strategy – spanning talent, regulation, innovation and investment is attracting global tech firms and increasing AI-related investment. Local companies as well as selected REITs investing in data centers stand to benefit from the rising AI-related capex.

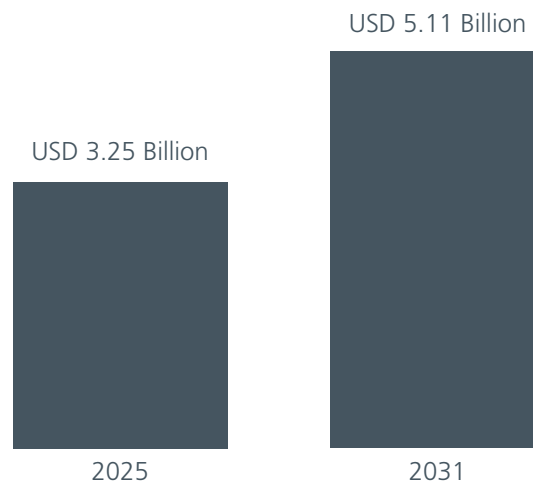


Tell me more

In a recent study, Boston Consulting Group assessed how ready 73 economies are for artificial intelligence (AI). Singapore stood out as one of just five "AI pioneers" globally - countries that have successfully combined strong investment and digital infrastructure to turn AI into a competitive advantage. Among the five, Singapore and the US stand apart for their deep pools of AI talent, which is crucial for driving innovation. This strong talent base, together with Singapore's stable regulatory environment, makes Singapore an attractive hub for AI companies to grow and expand across Asia.

Singapore's data center market is forecasted to grow from USD3.25 billion in 2025 to USD5.11 billion by 2031. The government's initiatives are helping to drive robust infrastructure for AI adoption across sectors. Singapore's position as one of the world's largest submarine cable hubs also enhances its appeal as a data center location. This, together with Singapore's open telecom market, and strong regulatory framework have enabled the country to attract major investments from hyperscalers such as Google, Meta, and Amazon.

Singapore's Data Center Market is expected to grow by a CAGR of 7.8%



Source: Arizton – Singapore Data Center Market Size & Analysis.



☆ What it means for you

Investors can access AI exposure in Singapore through multiple avenues. This includes data-centre REITs and industrial REITs with data-centre exposure, which sit at the core of the digital infrastructure supporting AI workloads. Data-center stocks can offer investors resilient income alongside long-term growth potential.

Investors can also gain exposure through emerging technology champions that support the AI value chain. In Singapore, these include companies supplying components to semiconductor equipment manufacturers, benefiting from rising demand for advanced packaging and testing driven by AI accelerators, robotics and high-performance AI applications. It also includes companies that provide critical components to AI servers and data-centre racks, as well as those involved in high-value manufacturing and testing technologies.

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AI "pioneer" economies globally
Singapore is one of them

57%

Forecasted growth in Singapore's data-centre market
2025- 2031

💡 Tip

AI isn't just a US tech story. Asia and Singapore offer differentiated AI exposure – potentially at more attractive valuations. That said, **active investing and discipline is needed to look through the hype that**

is often associated with AI stocks, in order to uncover real opportunities.

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