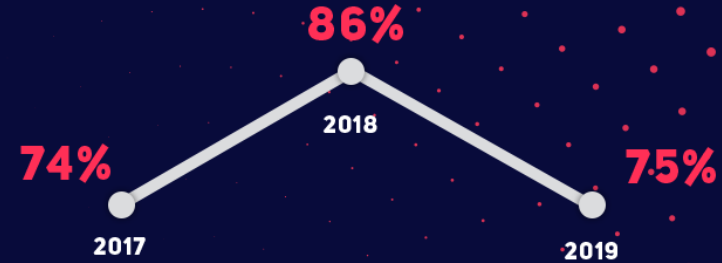


BUSINESS FORECAST

30 UAH/1\$

AVERAGE CURRENCY RATE
FACTORED INTO 2019 BUDGETS



PERCENTAGE OF CEOS EXPECTING
POSITIVE GROWTH DYNAMICS FOR THEIR BUSINESS

58%

PLAN TO INCREASE
STAFF

33%

WILL LEAVE STAFF
UNCHANGED

9%

PLAN STAFF
CUTS

42%

PLAN TO INCREASE
COMPENSATION BY 10 TO 20%

IMF PROJECTIONS: GLOBAL EXPANSION

3.5%

IN 2019

3.6%

IN 2020

0.2 AND 0.1 PERCENTAGE POINT BELOW LAST OCTOBER'S PROJECTIONS

REASONS BEHIND DOWWARD REVISION

"No-deal" withdrawal of the UK from the EU

Greater-than-envisaged slowdown in China

Negative effects of tariff increases enacted in the United States and China

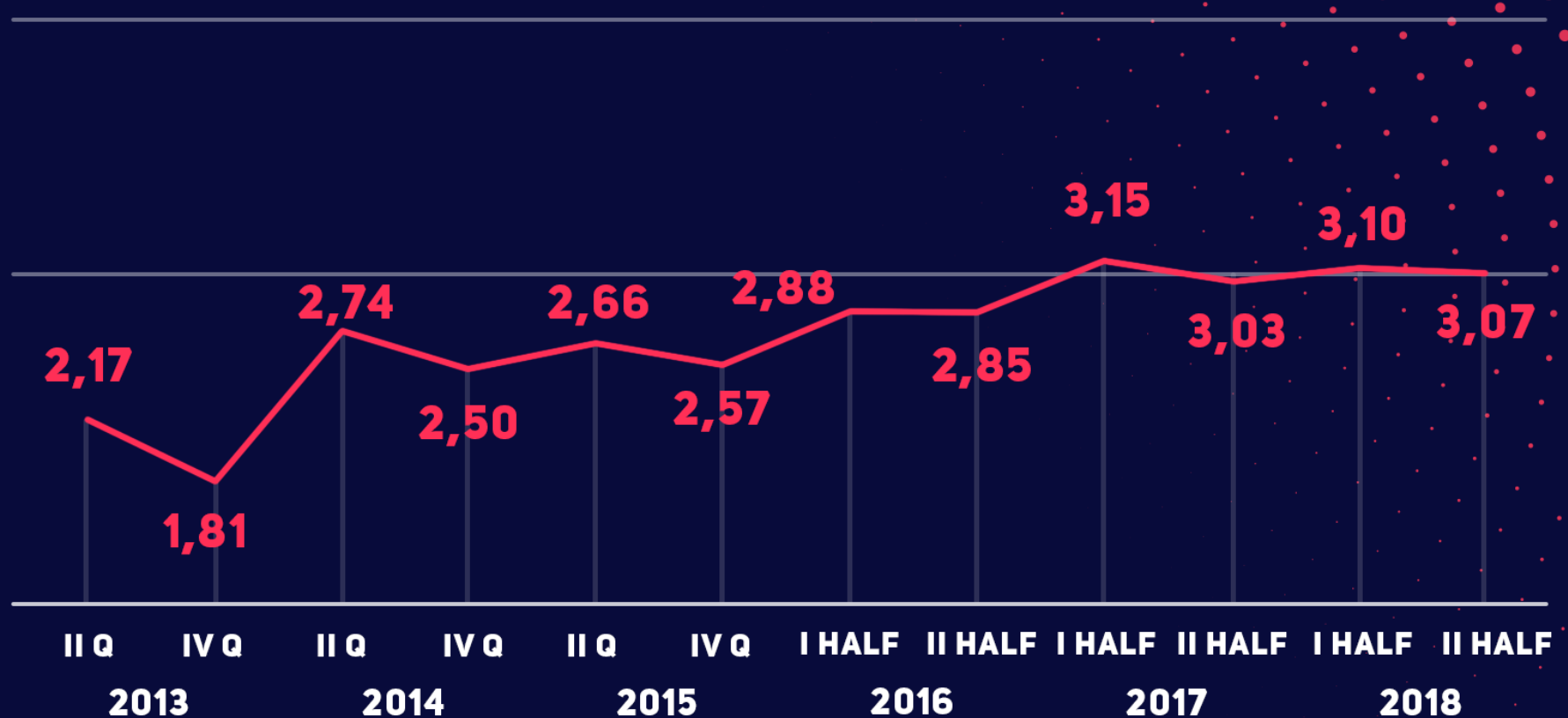
INVESTMENT ATTRACTIVENESS INDEX

2013-2018 DYNAMICS

5 - POSITIVE

3 - NEUTRAL

1 - NEGATIVE



TOP TEN ACHIEVEMENTS 2014-2019



DCFTA & Association
Agreement



Visa Free
Regime



Automated VAT
Refund



Currency
Liberalization



Banking Sector
Reform



Prozorro
Procurement



Abolishment
of Social Goods
Pricing Regulation



Single
Window
on Customs



Single Treasury
Account for Customs
Payments



Start of Court/
Healthcare/Pension
and Education
Sector Reforms

WORLD HAPPINESS INDEX VS INDEX OF ECONOMIC FREEDOM IN UKRAINE

