

The Boom of 2017

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Last Year's First Slide



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This Year's First Slide



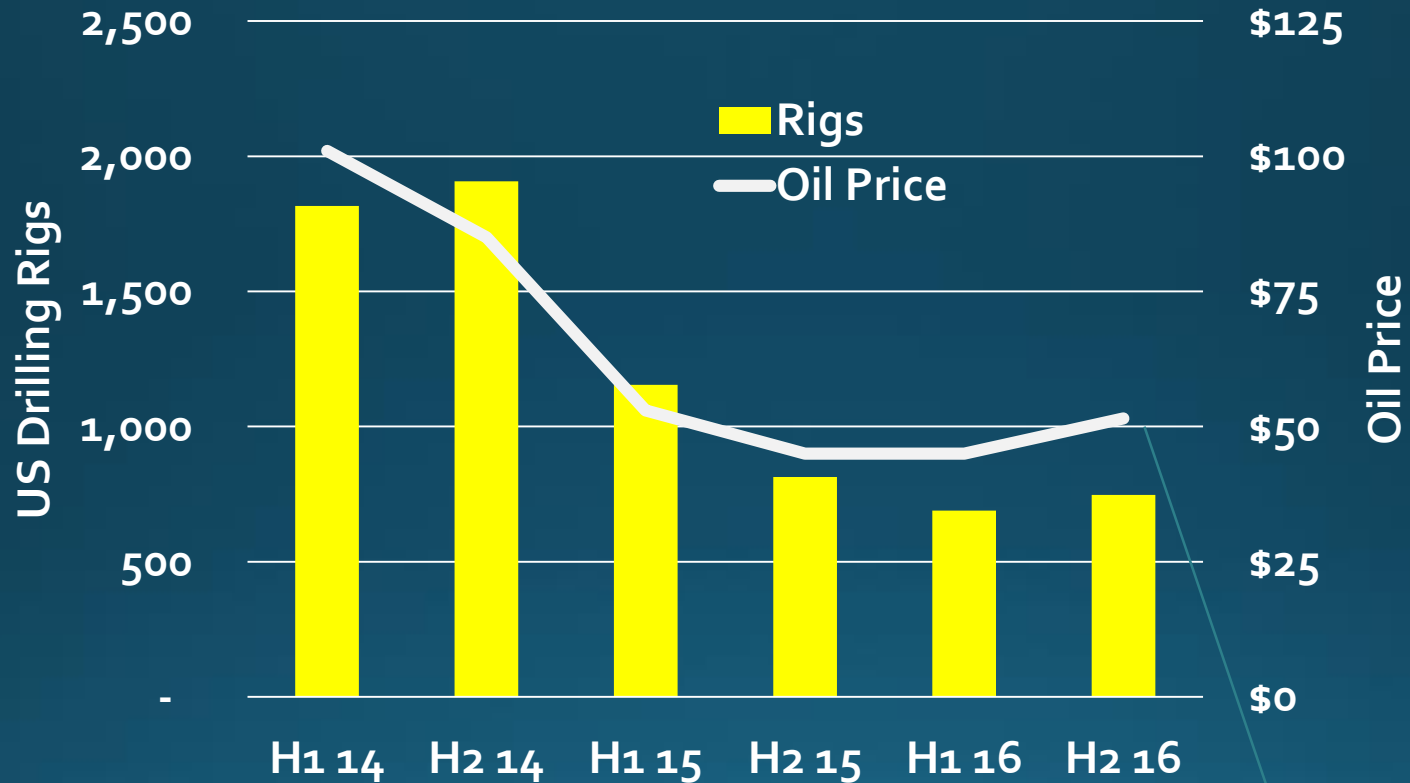
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Last Year's Forecast



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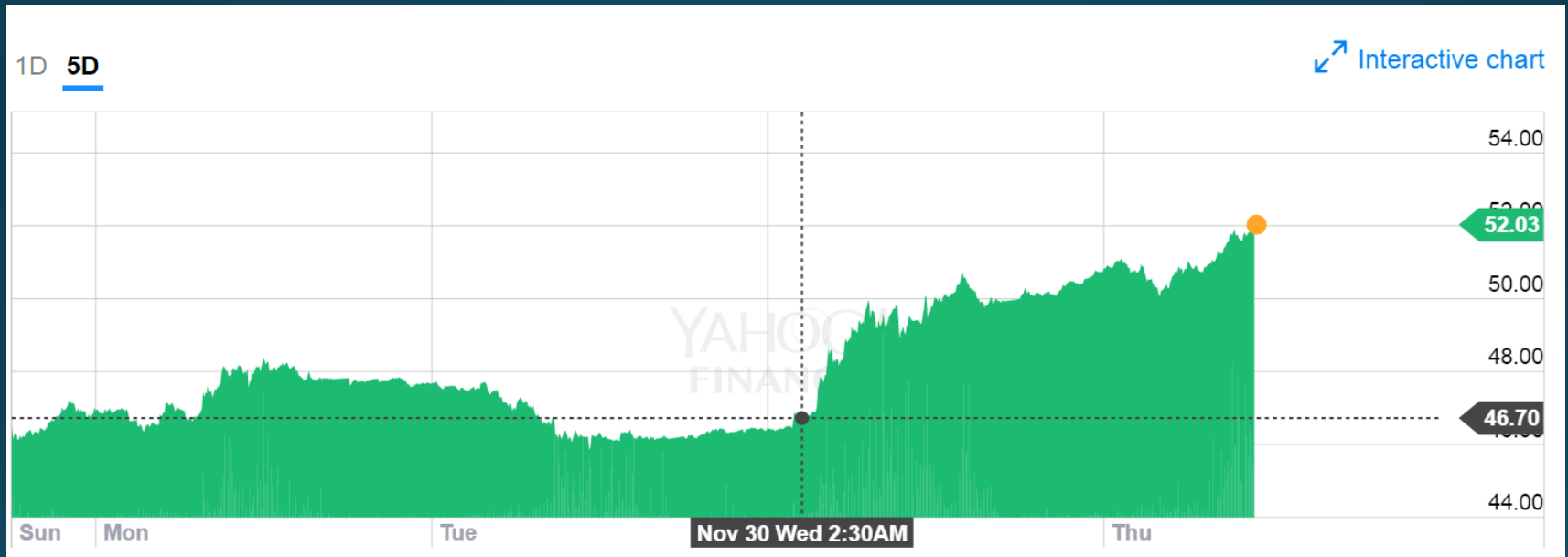
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\$52

Thank You, OPEC



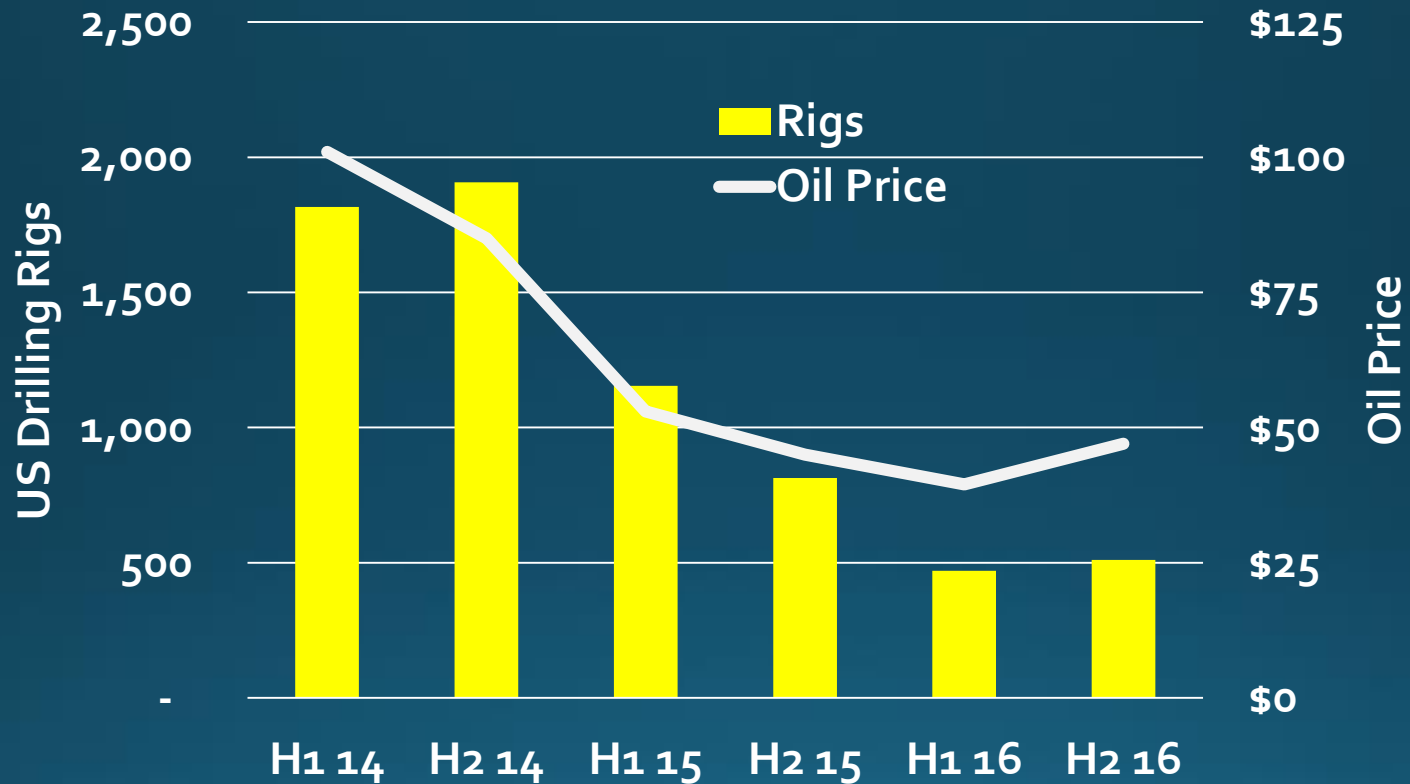
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Actual



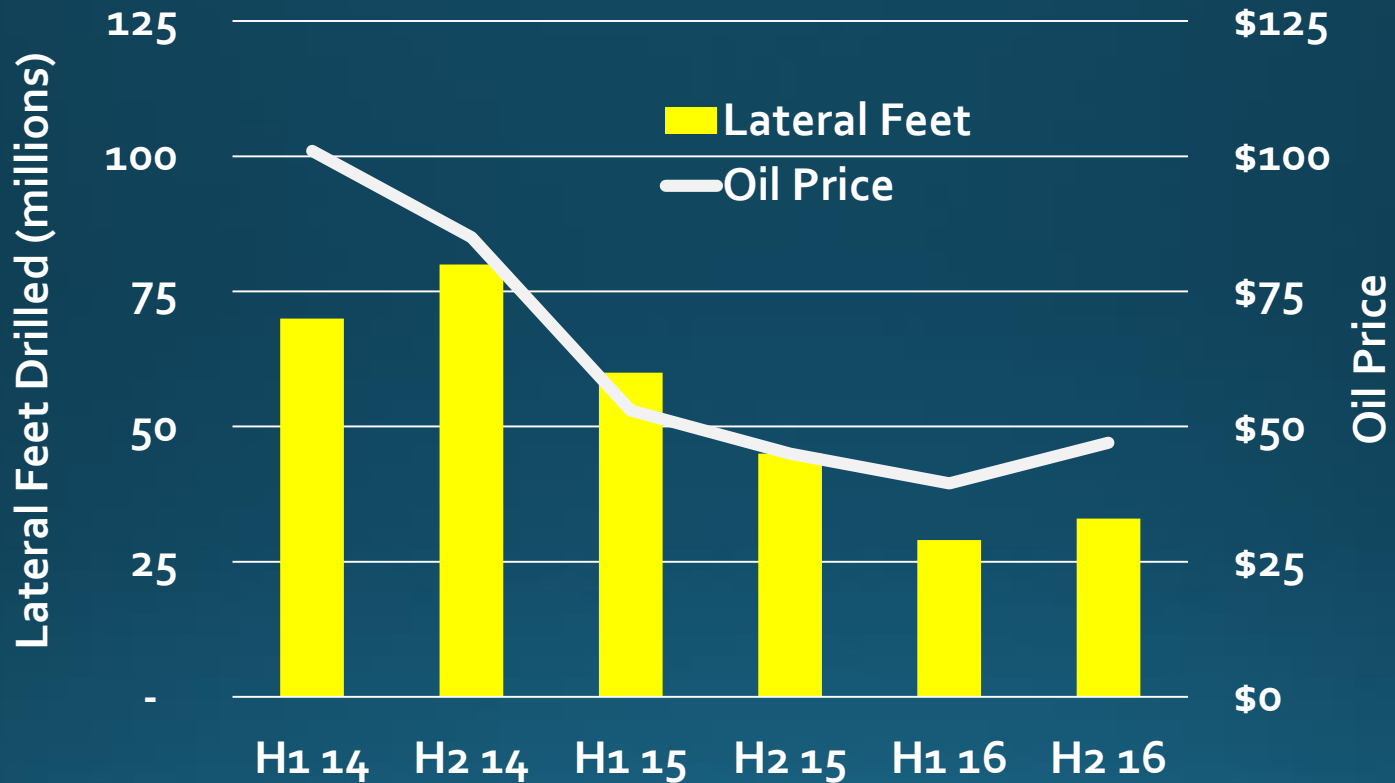
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Reservoir-Feet of Hole



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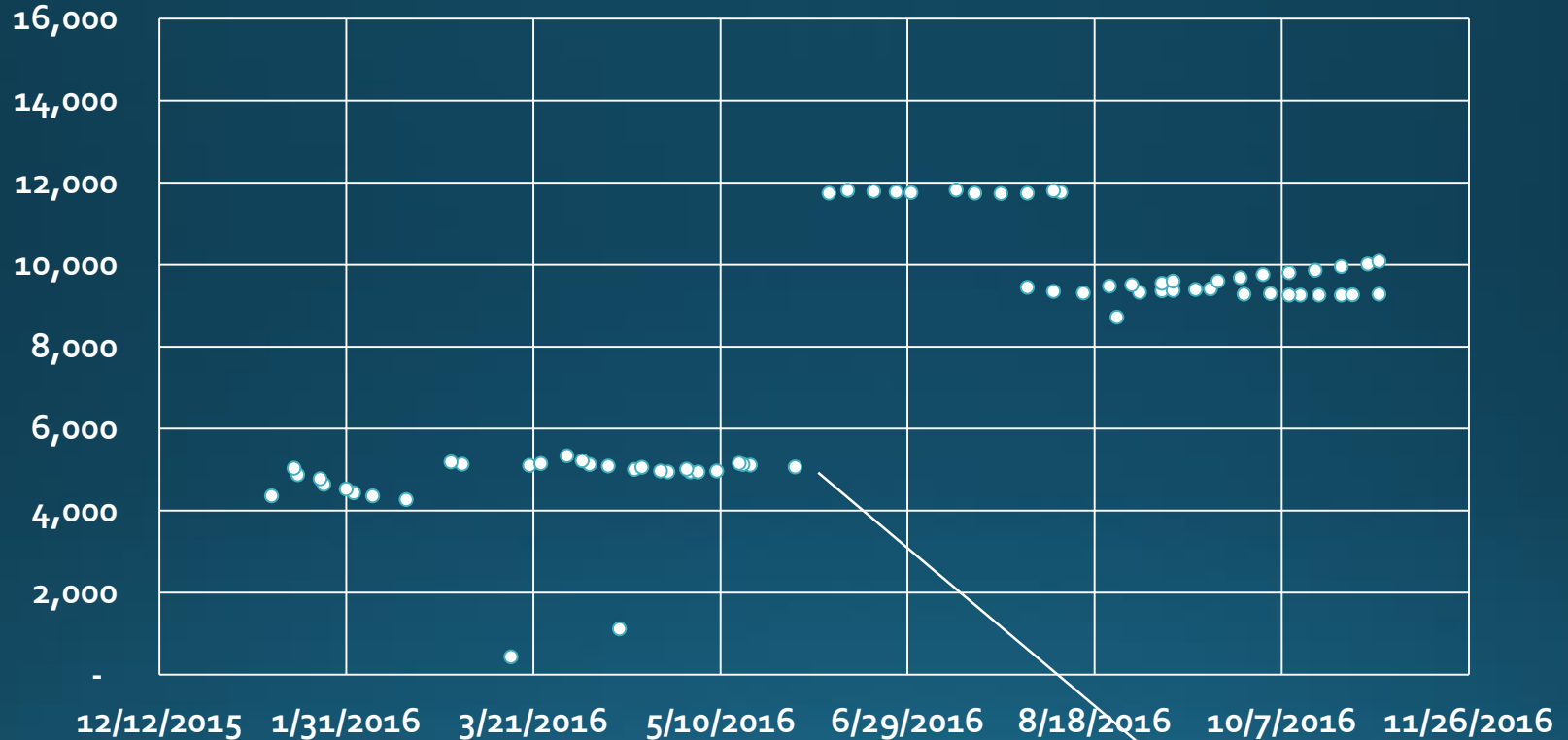
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2016 Niobrara Laterals

TD Date vs Lateral Length
(Extraction Oil & Gas)



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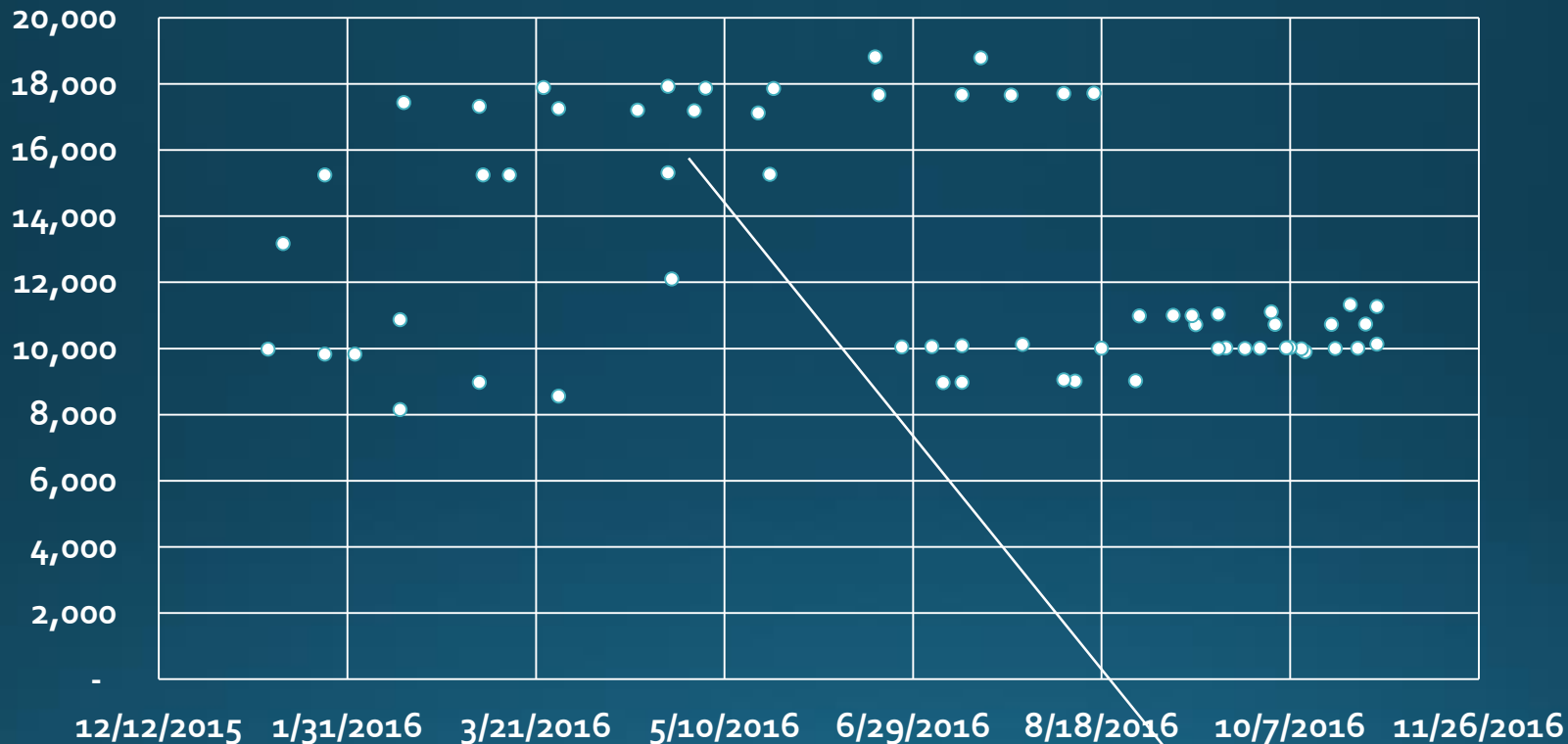
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Here we see drilling on multi well pads. Laterals tend to be uniform on each pad.

2016 Bakken Laterals

TD Date vs Lateral Length
(Continental Resources)



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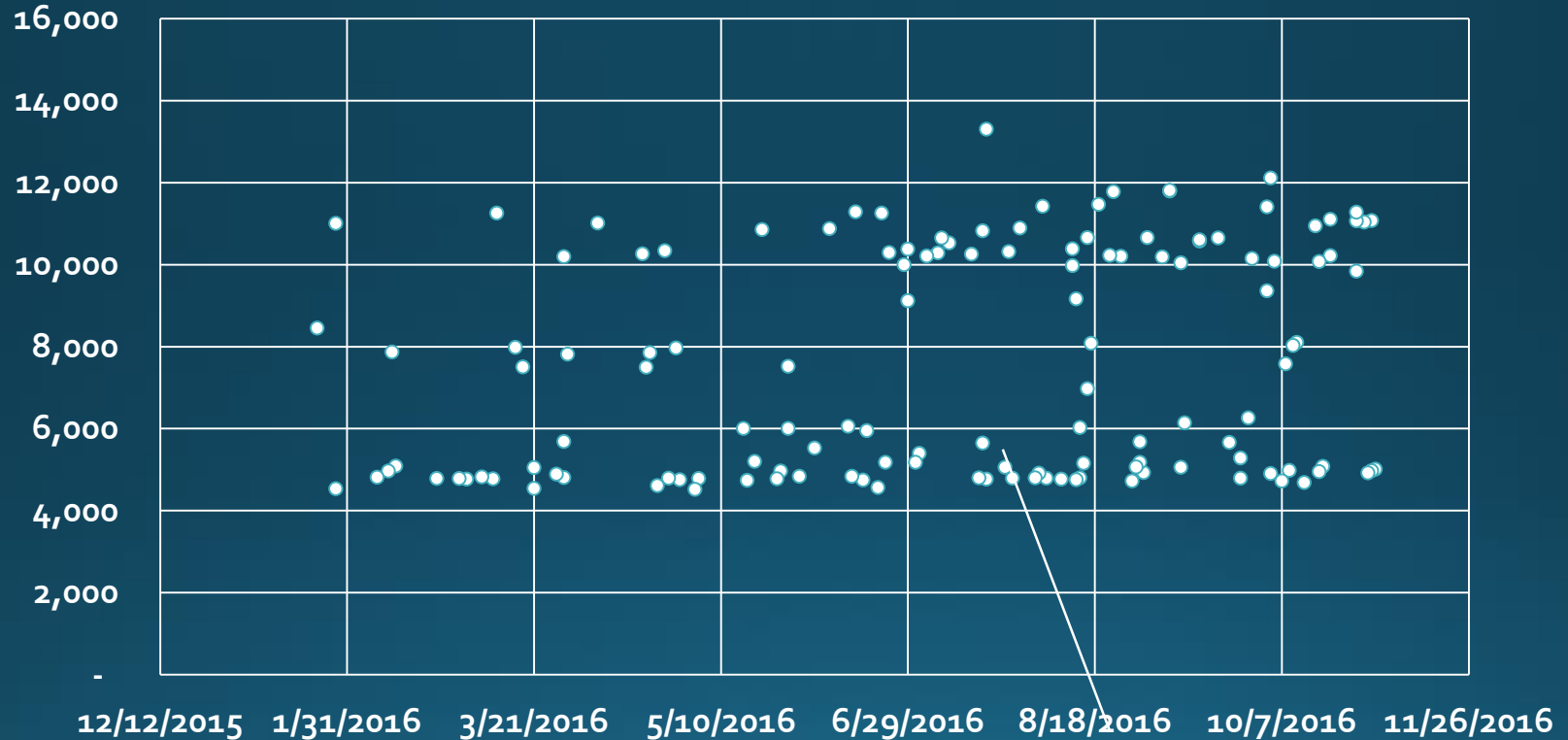
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Here we see
Continental drill
extremely long
laterals due to
geography

2016 Permian Laterals

TD Date vs Lateral Length
(Concho)



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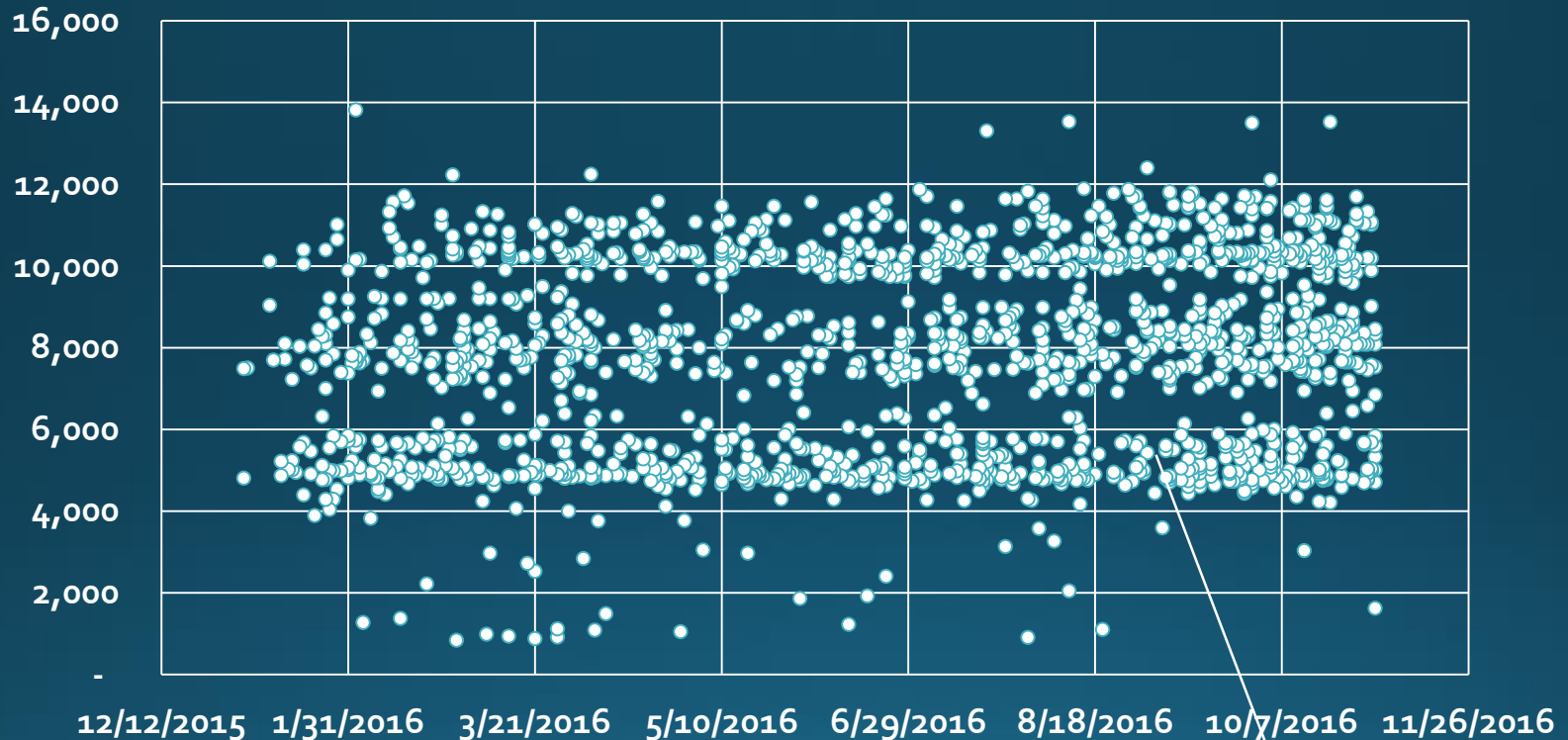
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Here we see
Concho increasing
its use of 11,000'
laterals while not
abandoning 5,000'.

2016 Permian Laterals

TD Date vs Lateral Length



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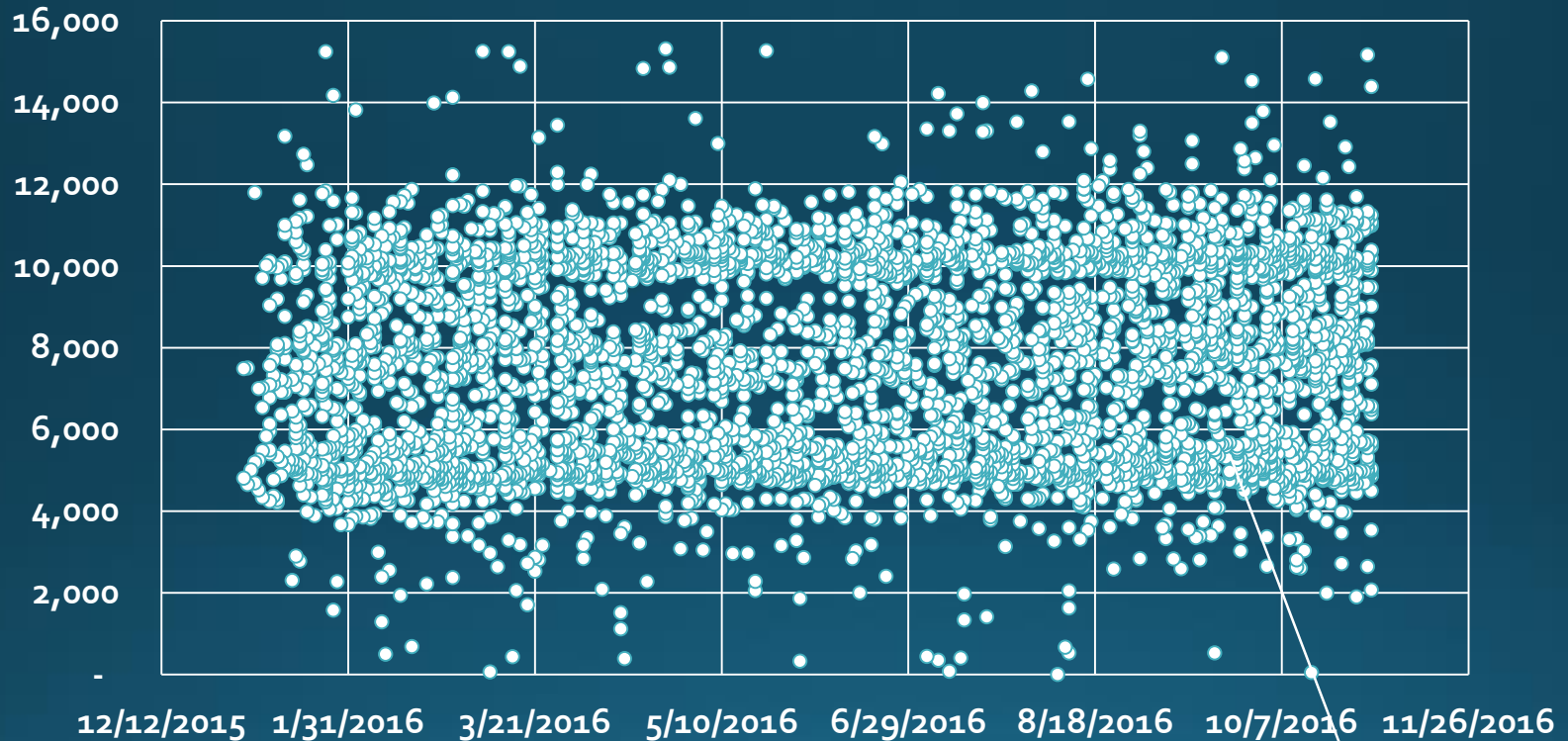
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This is a graph of all Permian horizontal wells. 3 clusters emerge: 5k', 8k' and 11k' drilling.

2016 US Laterals

TD Date vs Lateral Length



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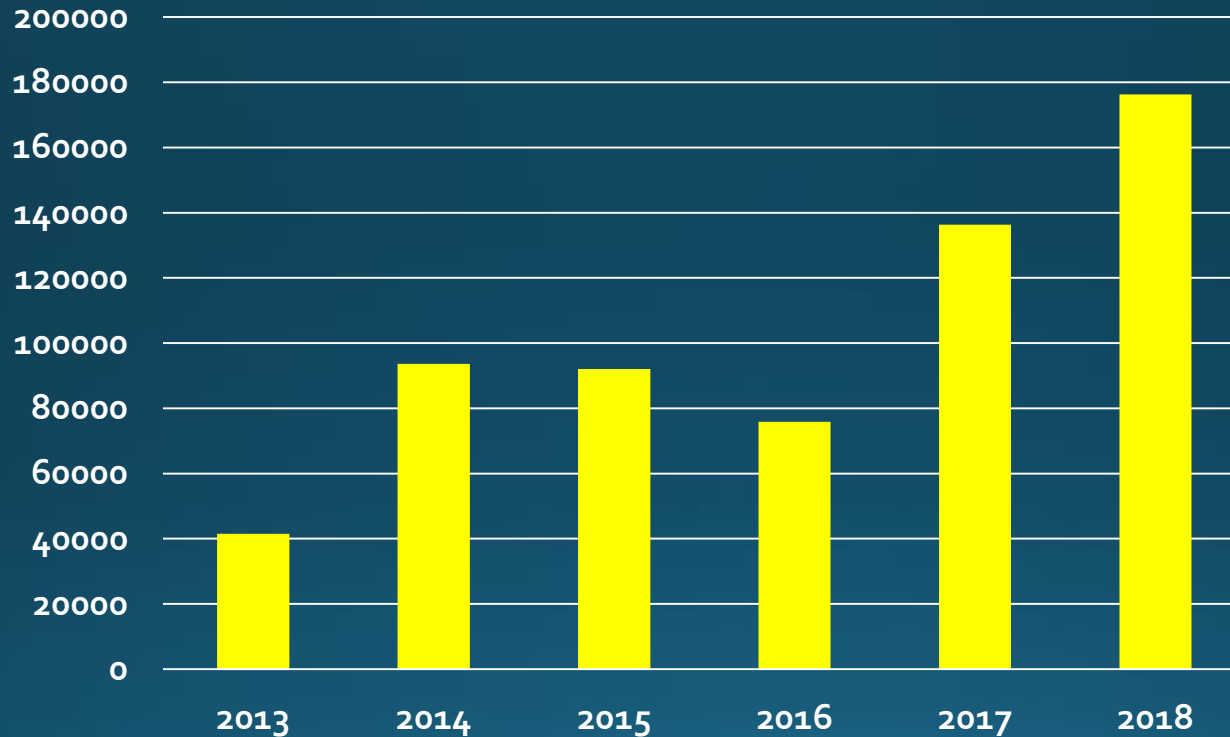
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This is a graph of all US horizontal wells. 3 clusters emerge: 5k', 8k' and 11k' drilling.

Frac Stages Pumped

Permian



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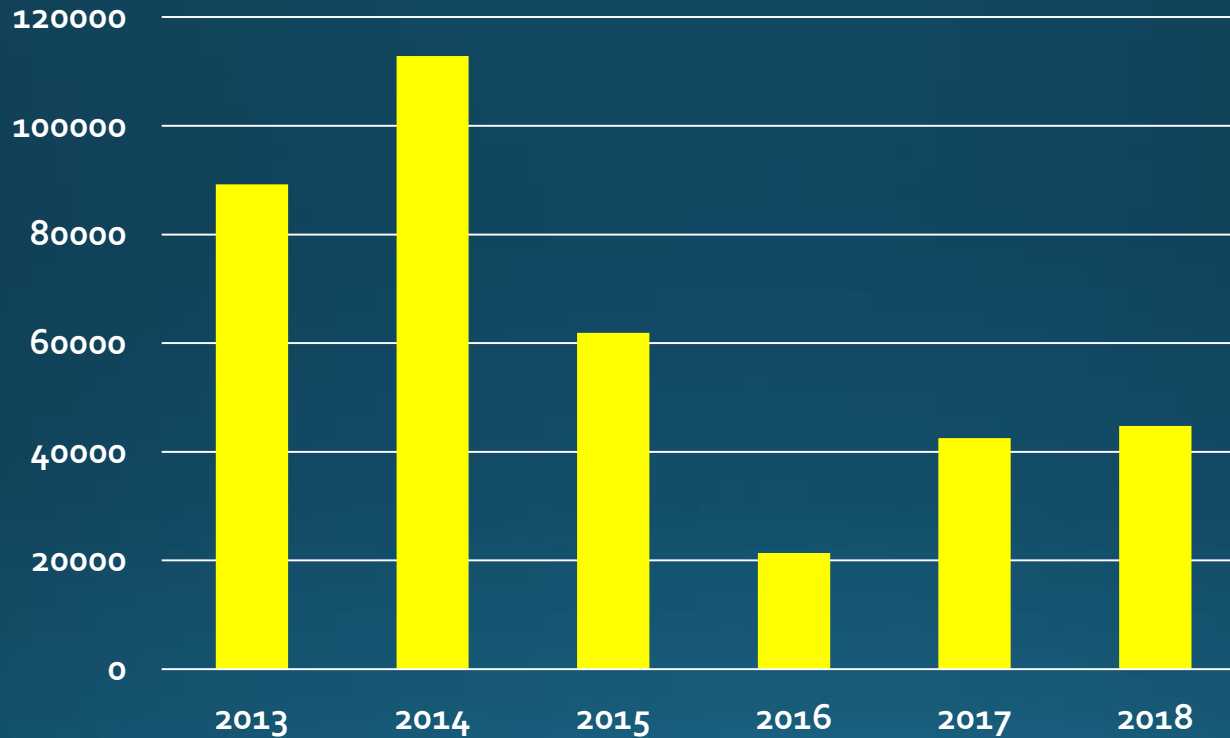
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Frac Stages Pumped

Bakken



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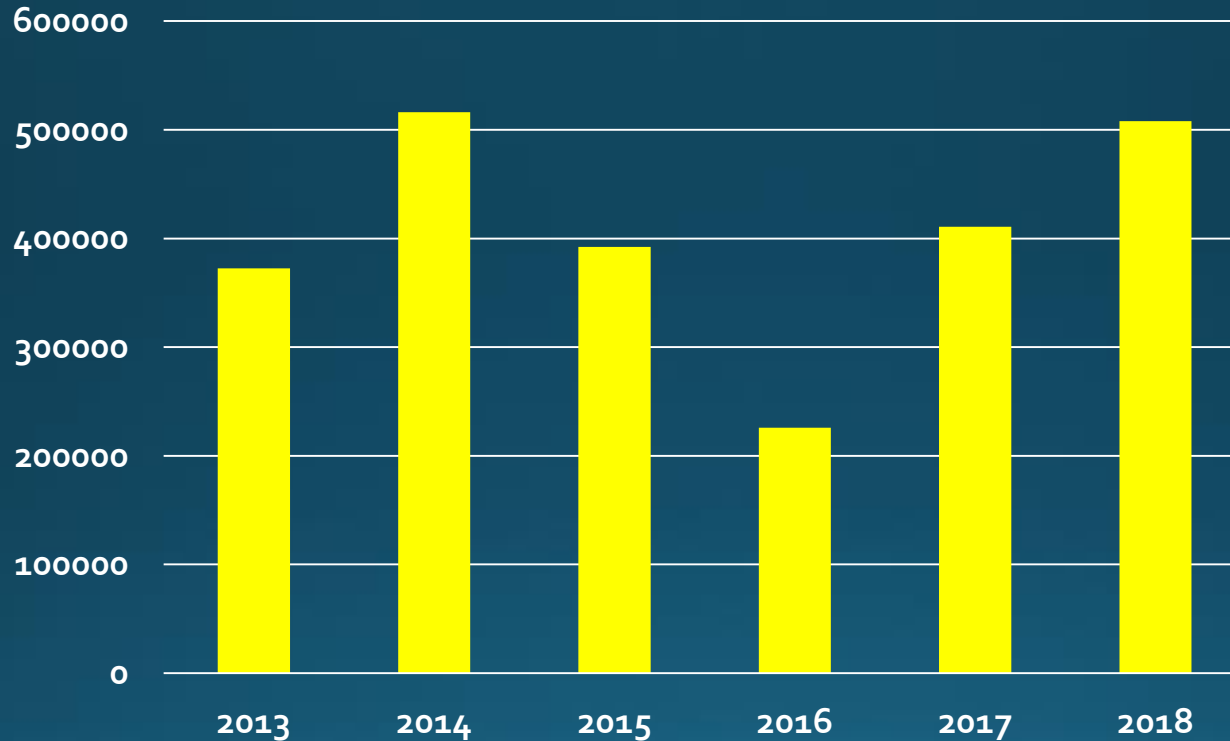
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Frac Stages Pumped

Total US



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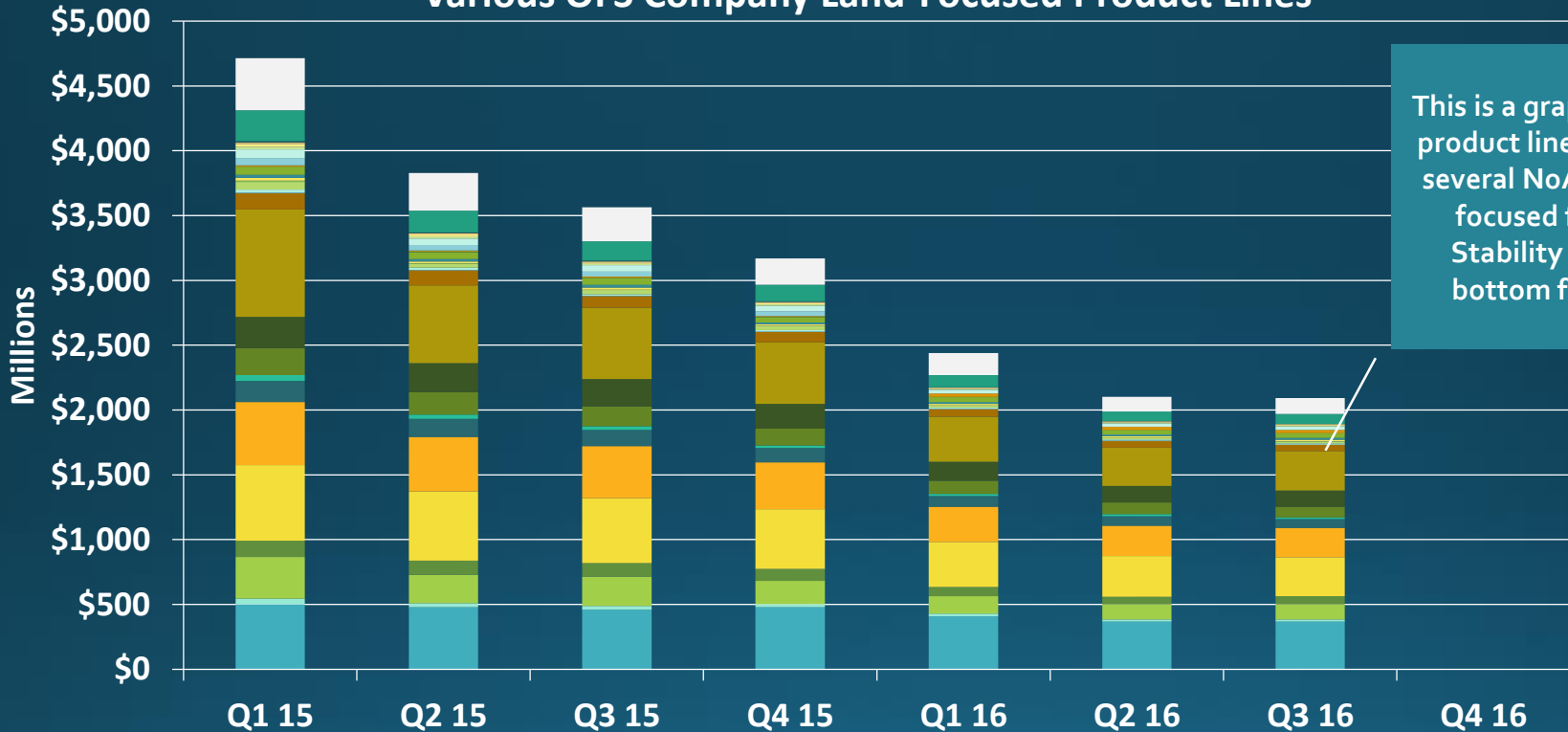
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Land Quarterly Revenues

Various OFS Company Land-Focused Product Lines



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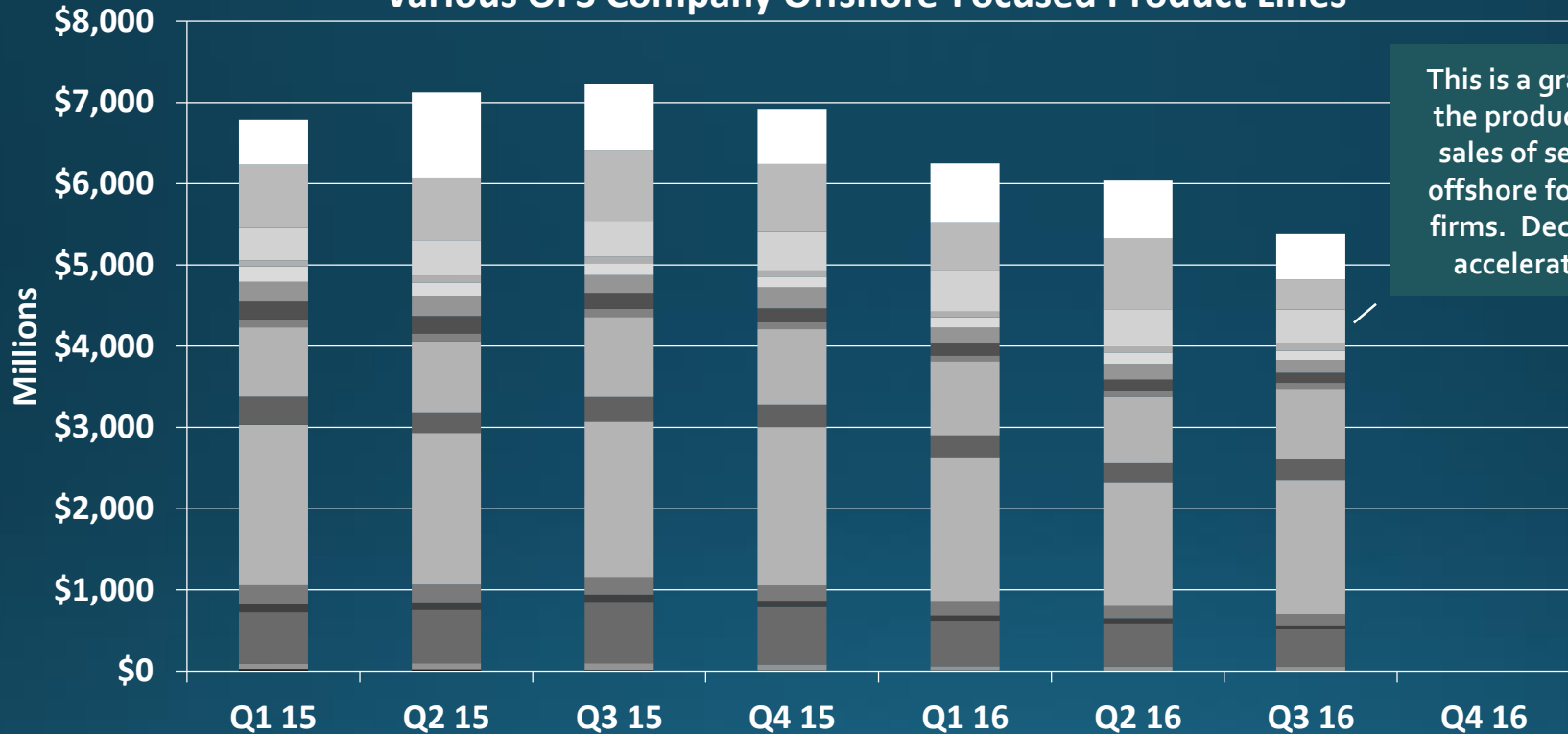
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Offshore Quarterly Revenues

Various OFS Company Offshore-Focused Product Lines



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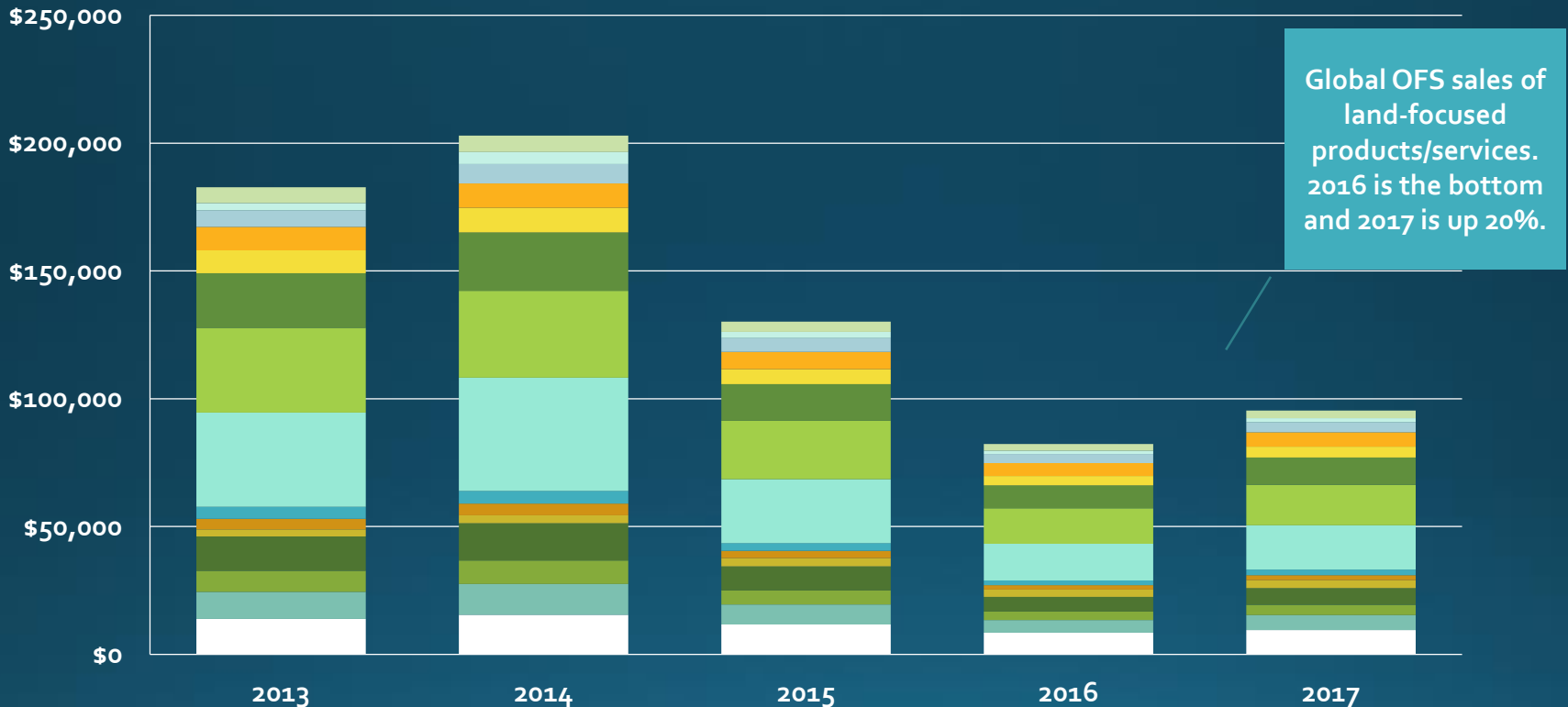
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Oilfield E/S Markets - Land

Global Revenues of Land-Focused OFS Companies (Millions)



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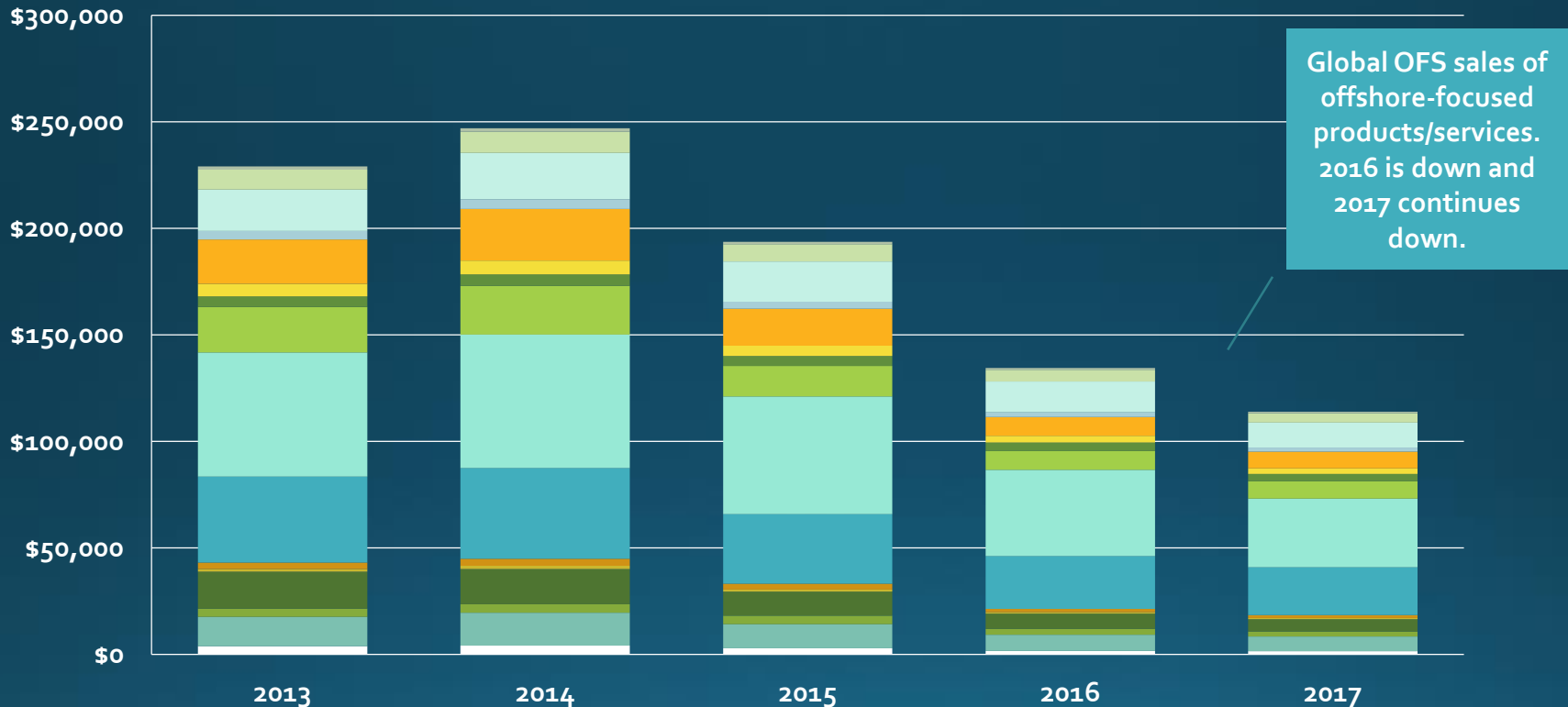
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Oilfield E/S Markets - Offshore

Global Revenues of Offshore-Focused OFS Companies (Millions)



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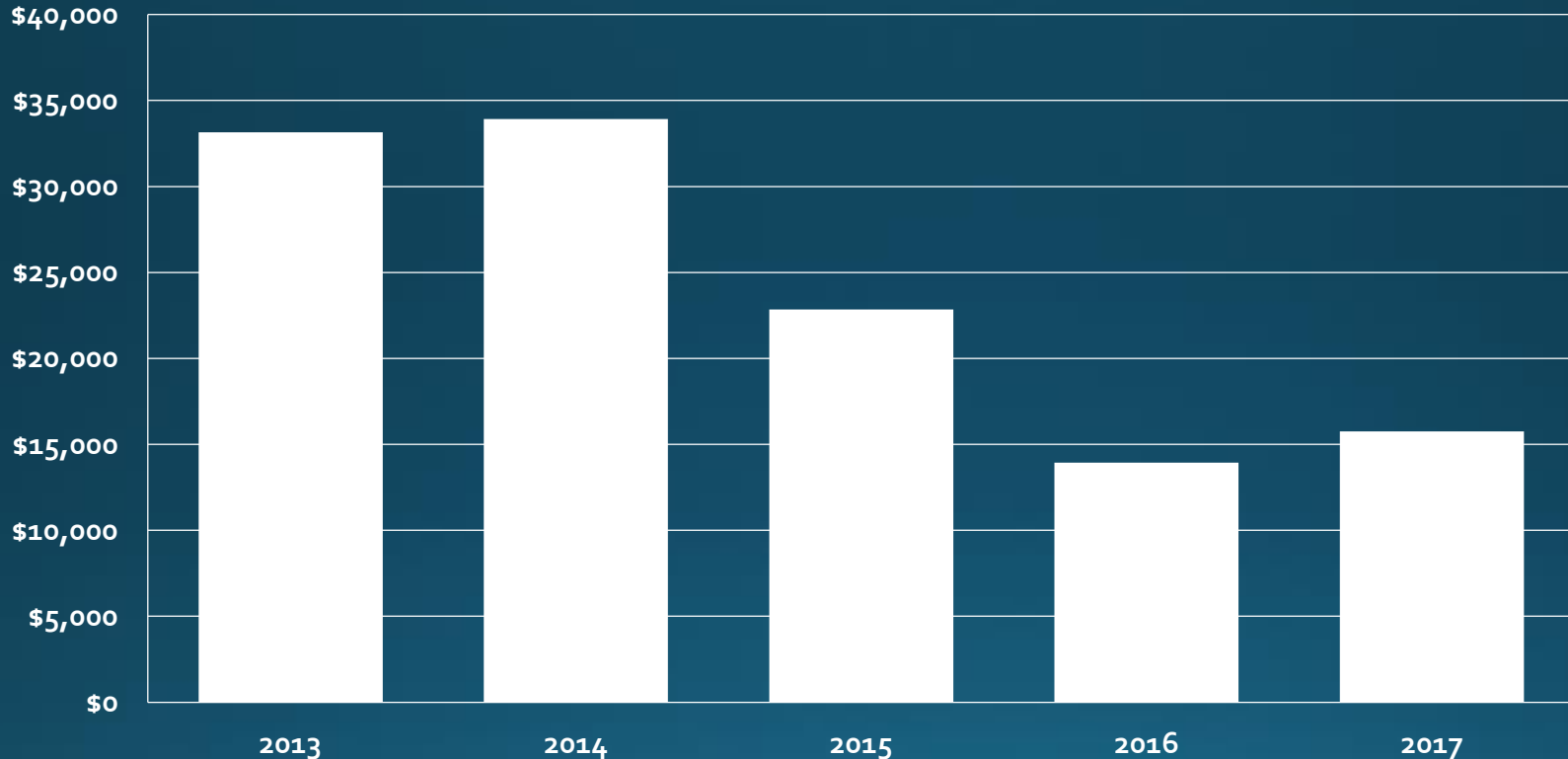
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Land Drilling Markets

Global Revenues of Land Contract Drillers (Millions)



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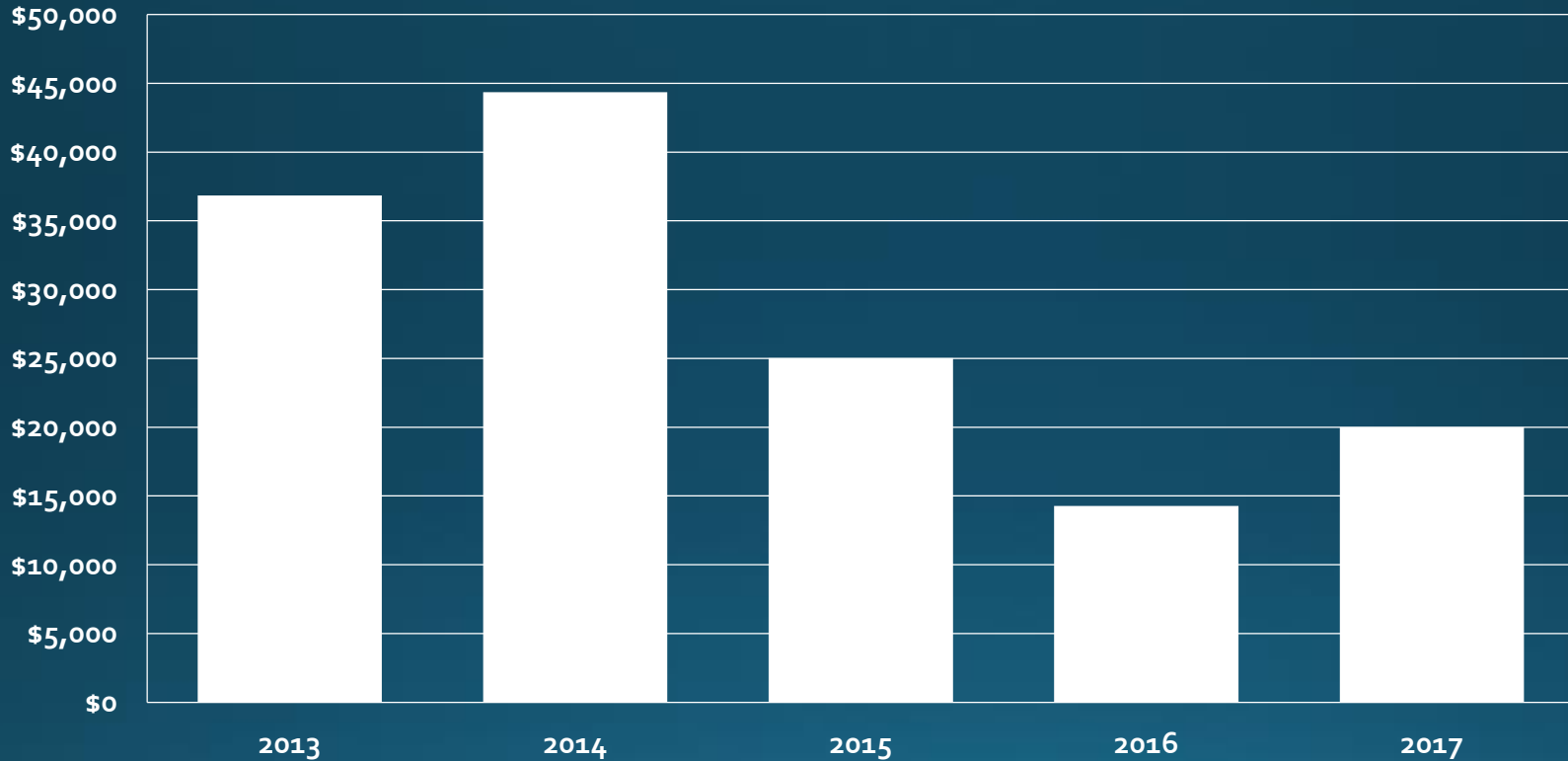
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Frac Markets

Global Revenues of All Frac Companies (Millions)



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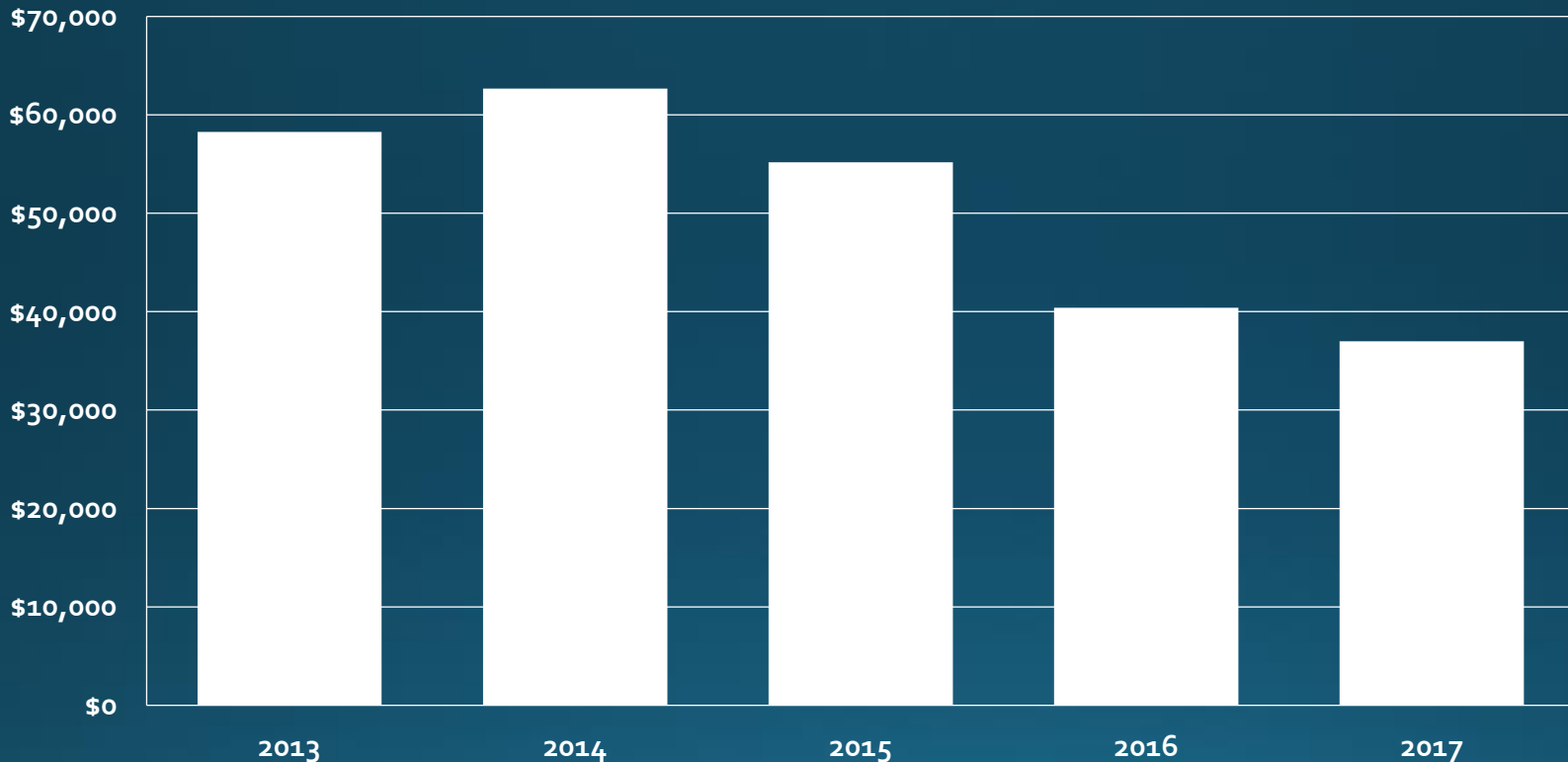
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Offshore Drilling Markets

Global Revenues of Offshore Contract Drillers (Millions)



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