



# Illustrative Present Value of Future Share Price - Pro Forma

INVESTMENT BANKING  
DIVISION

1.8 x Exchange Ratio | (\$ in per share amounts)

Pro forma  
yield based  
on blended  
2019 and  
2020  
Midstream  
and GP  
status quo  
yields

| Pro Forma                                              | 3rd 30-18E    | 2019           | 2020           | 2021           | 2022          |
|--------------------------------------------------------|---------------|----------------|----------------|----------------|---------------|
| <b>Cash Flows to Equity</b>                            |               |                |                |                |               |
| Dividend Per Share                                     | \$ 0.53       | \$ 1.19        | \$ 1.64        | \$ 2.03        | \$ 2.48       |
| Discount Period for Dividend Received*                 | 0.25          | 1.00           | 2.00           | 3.00           | 4.00          |
| Illustrative Cost of Equity                            | 9.0 %         |                |                |                |               |
| Discount Factor                                        | 0.98          | 0.92           | 0.84           | 0.77           | 0.71          |
| <b>Present Value of Dividend Received</b>              | <b>\$0.52</b> | <b>\$1.10</b>  | <b>\$1.38</b>  | <b>\$1.57</b>  | <b>\$1.76</b> |
| <b>Present Value of Future Share Price at Year End</b> |               |                |                |                |               |
| NTM Dividend Per Share at Year End                     |               | \$ 1.64        | \$ 2.03        | \$ 2.48        |               |
| Illustrative NTM Dividend Yield                        |               | 7.0 %          |                |                |               |
| Implied Year End Share Price                           |               | \$23.37        | \$28.68        | \$36.45        |               |
| Discount Period for Share Price*                       |               | 1.5            | 2.5            | 3.5            |               |
| Discount Factor                                        |               | 0.88           | 0.81           | 0.74           |               |
| <b>PV of Future Share Price</b>                        |               | <b>\$20.54</b> | <b>\$23.38</b> | <b>\$26.22</b> |               |
| (+) PV of Cumulative Dividends Received                |               | 1.62           | 3.00           | 4.56           |               |
| <b>PV of Future Share Price and Dividends</b>          |               | <b>\$22.16</b> | <b>\$26.38</b> | <b>\$30.78</b> |               |

|           |       | at Various Yields |          |          |       |  | at Various Yields |          |          |       |  | Break Even Yield |       |       |
|-----------|-------|-------------------|----------|----------|-------|--|-------------------|----------|----------|-------|--|------------------|-------|-------|
|           |       | 2019E             | 2020E    | 2021E    |       |  | 2019E             | 2020E    | 2021E    |       |  | 2019E            | 2020E | 2021E |
| NTM Yield | 6.5 % | \$ 23.73          | \$ 28.15 | \$ 32.80 | 6.8 % |  | \$ 20.72          | \$ 25.63 | \$ 30.66 | 7.5 % |  | 7.5 %            | 7.2 % | 7.0 % |
|           | 7.0   | 22.16             | 26.38    | 30.78    |       |  | 19.21             | 23.83    | 28.85    |       |  | 8.2 %            | 7.8 % | 7.6 % |
|           | 7.5   | 20.79             | 24.80    | 29.03    |       |  | 17.92             | 22.29    | 27.05    |       |  | 8.8 %            | 8.5 % | 8.2 % |

Source: Arkose Management, Bloomberg market data as of 04-Jun-2018

\* Distributions discounted according to the mid-period convention; all values discounted to 30-Jun-2018

# Goldman Sachs Investment Banking Training Manual Program

**D Kirk**



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