

Plays & Basins North America

**Leading source for commercial and strategic advisory,
with expert forward-looking guidance into unconventional
oil and gas development in the U.S. and Canada.**

Plays & Basins North America provides critical judgment and authoritative perspectives with the most comprehensive forward-looking analysis of oil and gas exploration and development in onshore unconventional plays in North America. The service supports the industry's play and basin level evaluation process by providing the outlook and guidance to address questions about competition, growth potential, portfolio priorities, business development opportunities, exploration activities and new venture strategies.

Expert Insights From The Service Enable You To

- Assess portfolio priorities with actionable expert guidance on play-level investment and operator competition
- Examine the drivers of onshore activity, both at company and play level with our regularly updated insights into value creation and operator performance
- Effectively disaggregate plays spatially, temporally, and distributionally
- Plan investment strategies in onshore North America
- Stay current with new exploitation trends

Analytical Foundations

- North America-based research team that is closely integrated with S&P's energy markets and technical teams
- Play analysis is grounded on S&P's industry leading databases, ensuring guidance and advisory can be traced to technical fundamentals
- Insights with play level forward looking supply outlooks that have rig based and market constrained production forecasts

Make Smarter Decisions With On-Demand Advisory

- Leverage actionable insights from North America experts when prioritizing portfolio investment
- Understand each North American play's strategic importance to your competitors
- Access expert advisory around how changes in future North America supply will impact your development plans
- Engage in challenge sessions to consider the running room within each play, and evolution of costs, economics, and recoveries

North America Play Coverage

**Analyst insights on basin and
play-level competition, value-
creation, and supply forecasts**

United States

Appalachia/NE

- Marcellus
- Utica

ArkLaTex/Gulf Coast

- Eagle Ford
- Haynesville
- Cotton Valley

MidContinent

- SCOOP
- STACK

Permian

- Bone Spring
- Delaware Wolfcamp
- Midland Wolfcamp

Rockies

- Bakken
- Niobrara/Wattenberg
- Uinta
- Powder River Basin

Smaller Plays

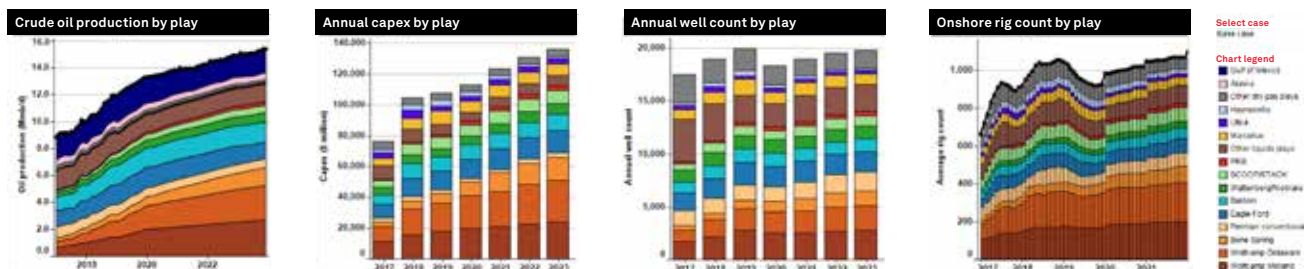
- Fayetteville
- Granite Wash
- Mississippian
- Pinedale

Canada

- Cardium
- Duvernay
- Montney
- Spirit River
- Viking

Key Play Analytics

An online interactive data visualization tool for analysis and evaluation of plays and operators



Deliverables

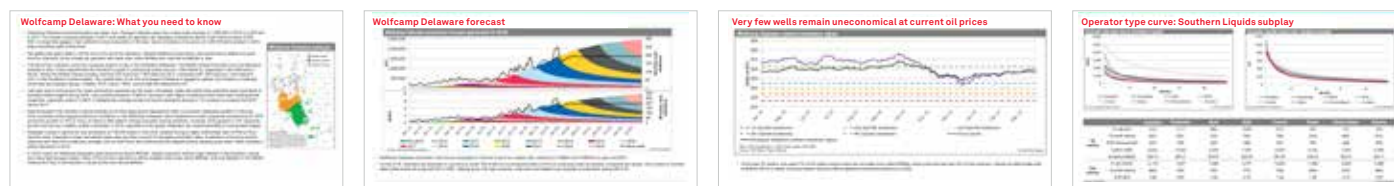
Turning expert led insights into actionable decisions

- Quarterly supply forecasts (reports and accompanying xls files with underlying data) including comprehensive views and scenario analysis of operator strategy, investor expectations, global commodity markets, midstream and service sector capacity, and play trend analysis
- Semi-annual updates to North America unconventional play workbooks (reports and accompanying xls files with underlying data)
- Ad hoc coverage of legacy and emerging plays
- Memos catered to clients with upstream interest or exposure including operator strategy and activity, recent mergers and acquisitions, above-ground issues, and leading-edge data analysis
- Key Play Analytics, online interactive visualization for analysis and evaluation of plays and operators critical elements in industry
- Access to analysts via webinars, events and onsite engagements
- Bi-weekly rig memos with detailed changes in rig activity by play and operator

Access

- Through our online application Connect™ or directly to your company's internal data management tools through APIs
- Enterprise access

Turning analytics into expertise



Executive summary

Supply outlook

Breakeven economics

Operator type curves

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