

# The Boom of 2017

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# Last Year's First Slide



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# This Year's First Slide



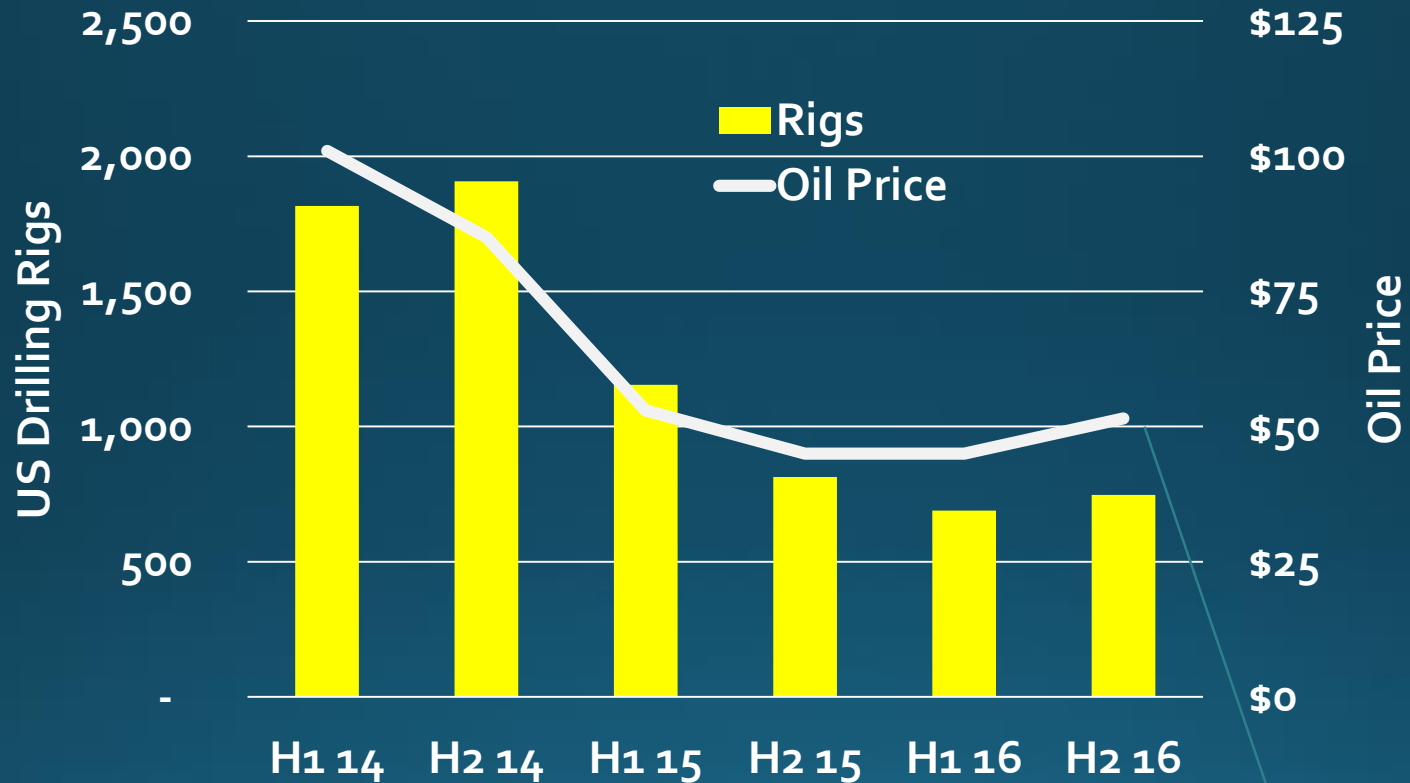
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# Last Year's Forecast



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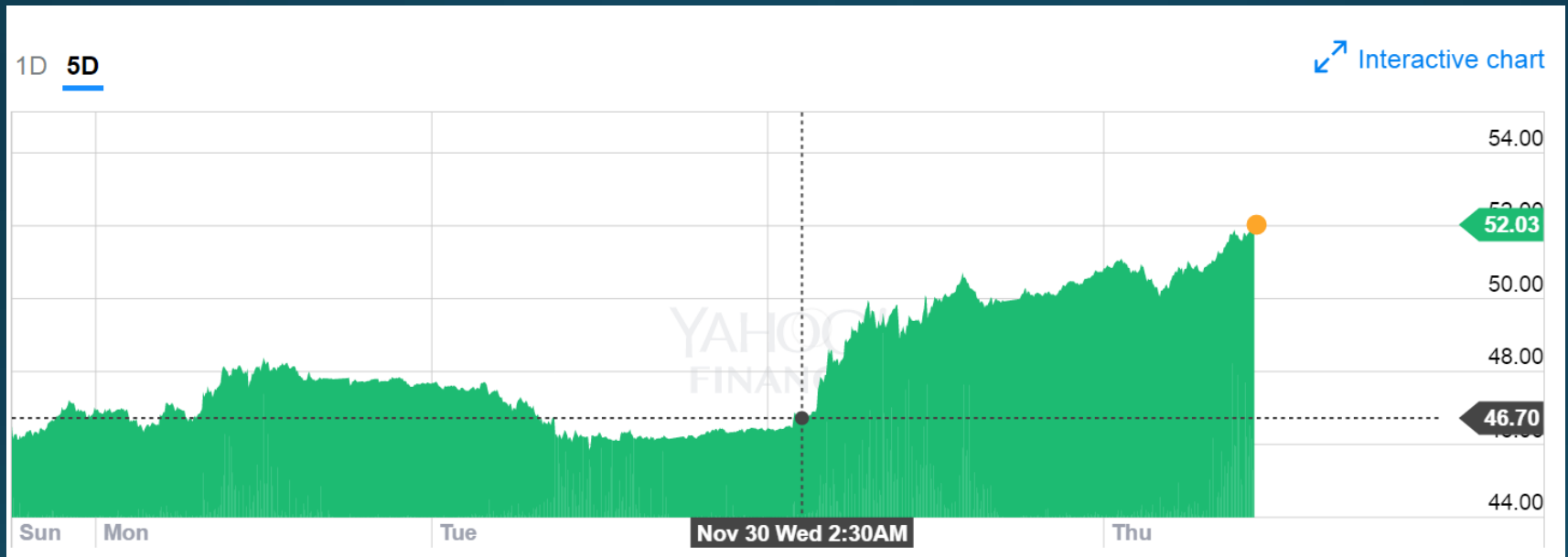
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\$52

# Thank You, OPEC



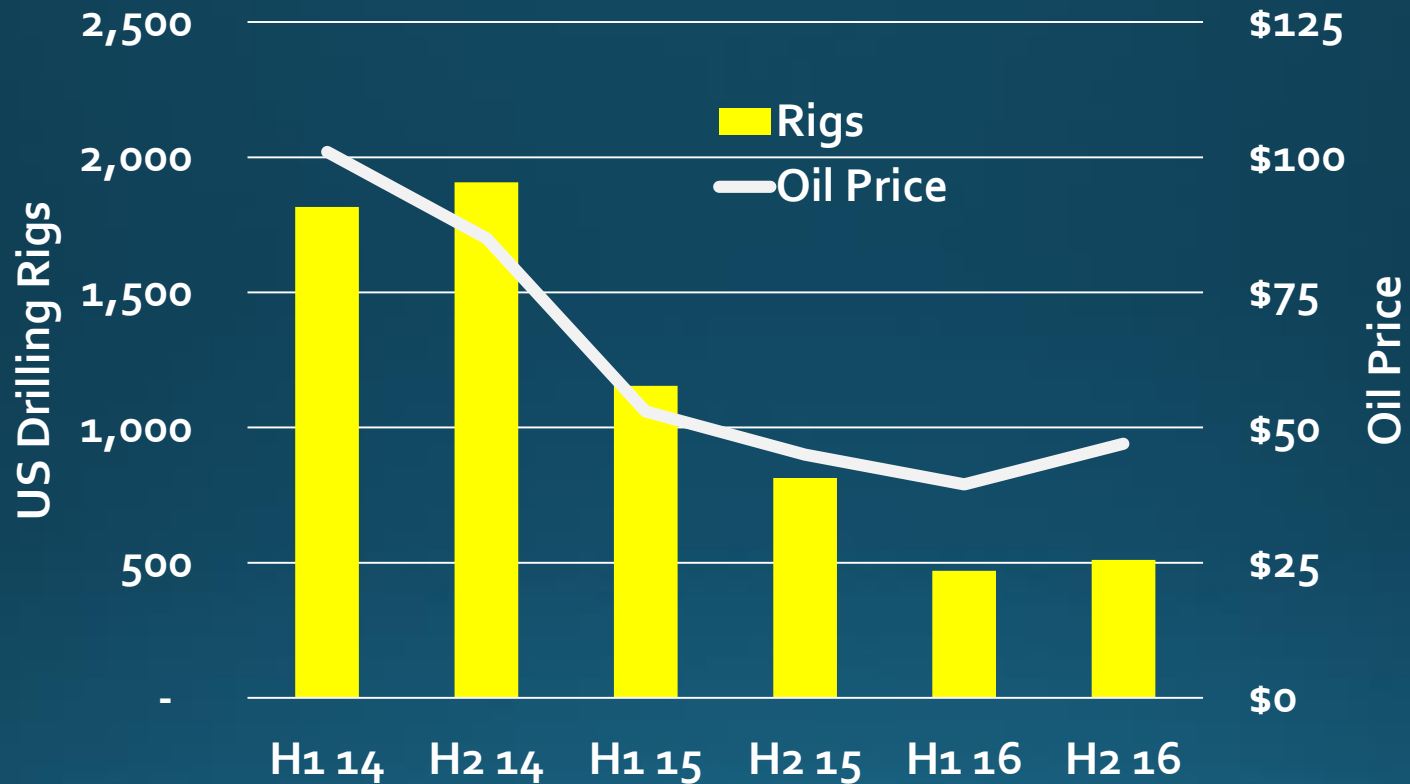
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# Actual



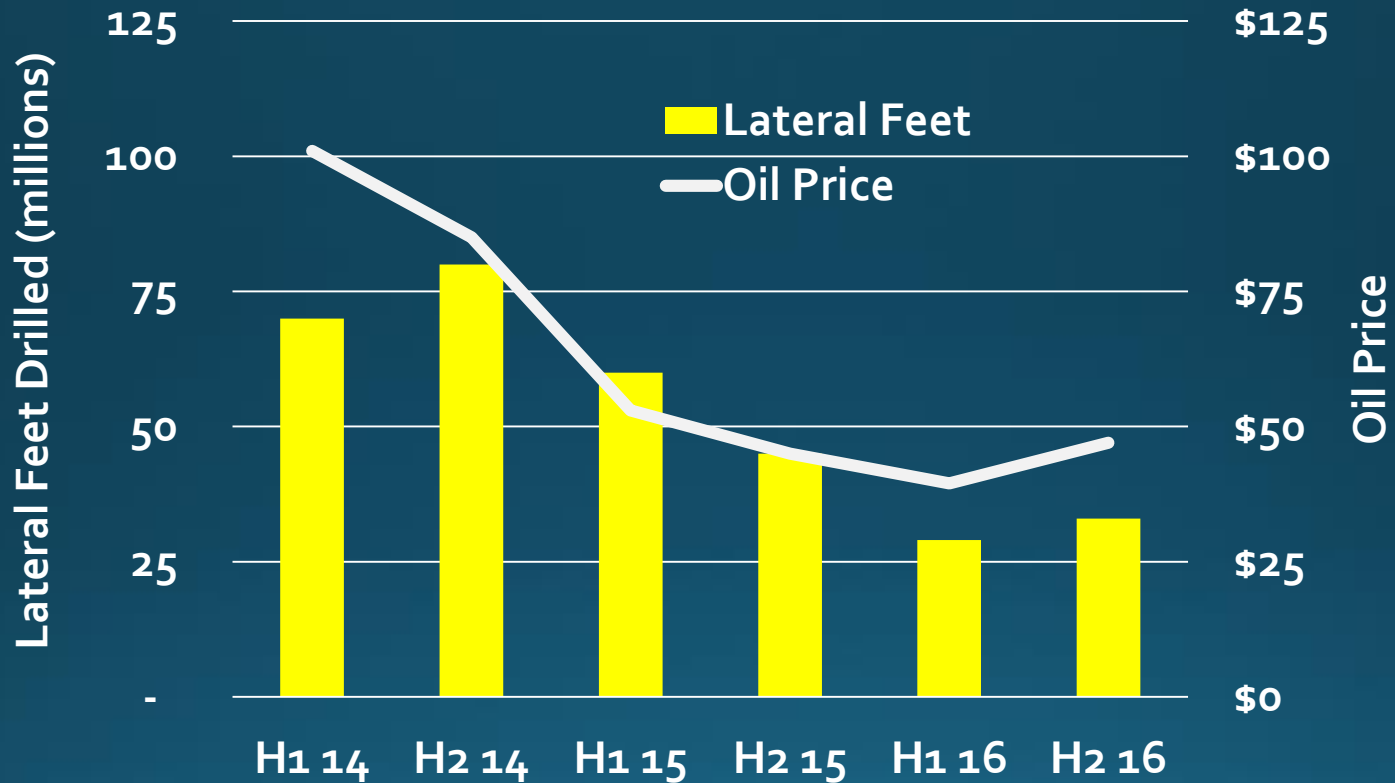
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# Reservoir-Feet of Hole



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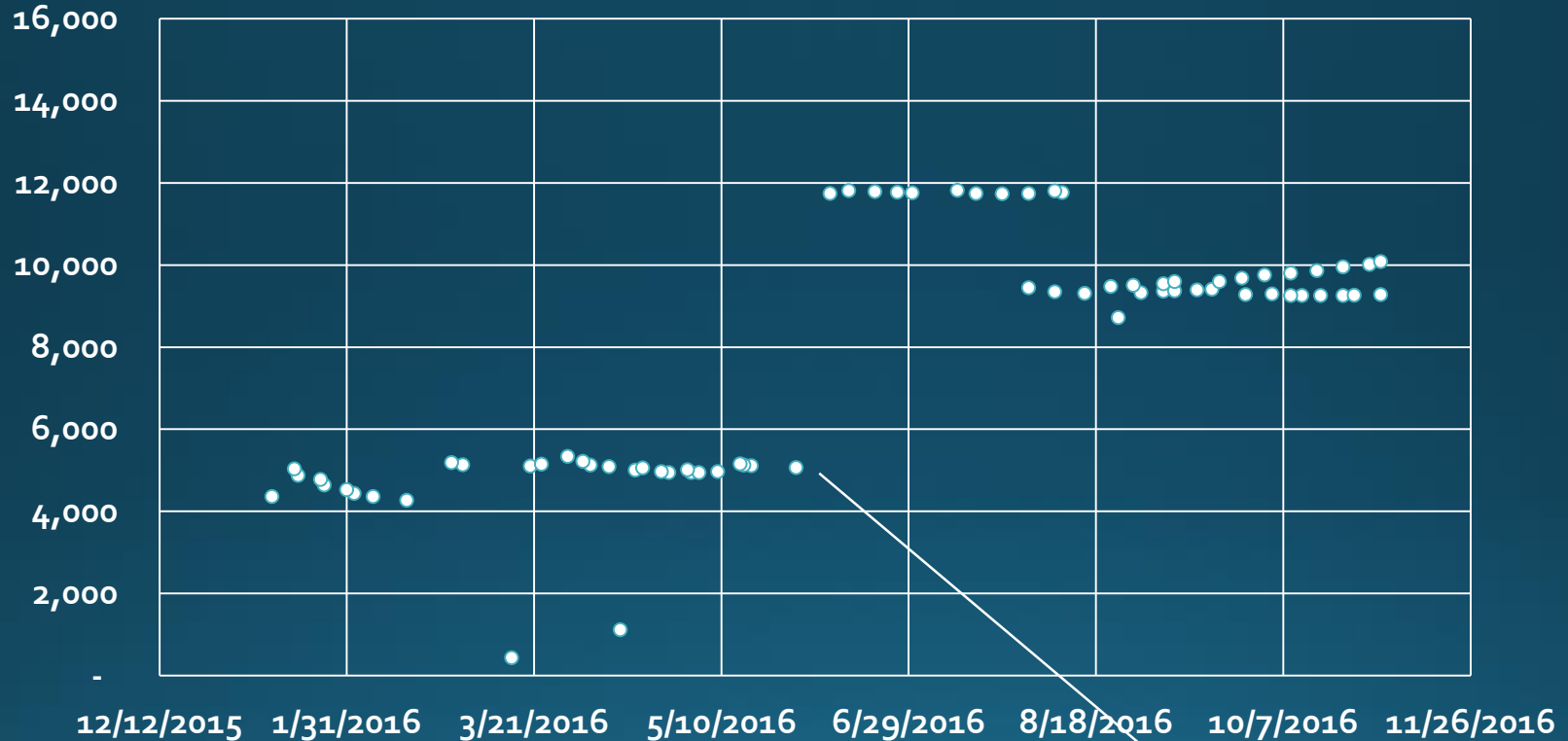
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# 2016 Niobrara Laterals

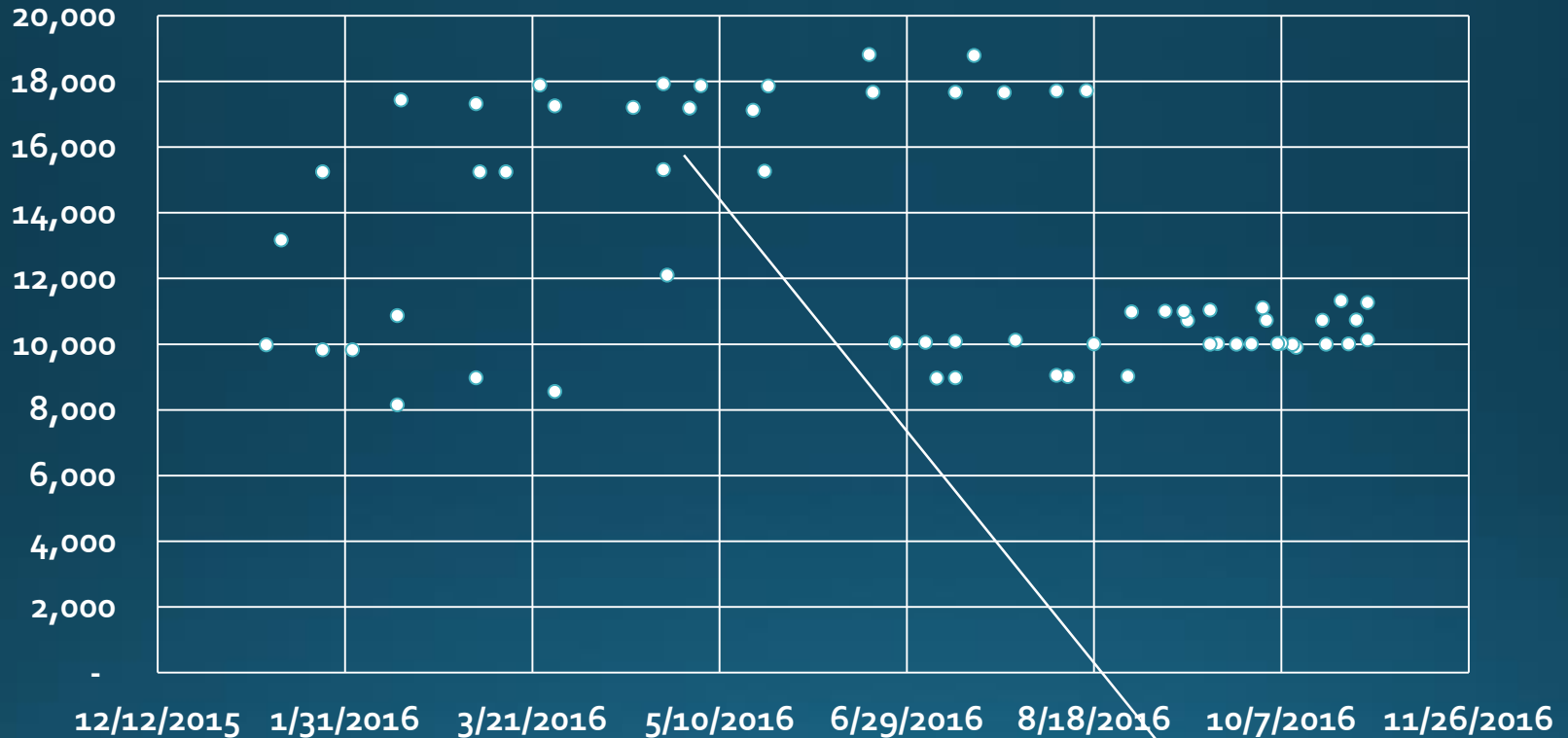
TD Date vs Lateral Length  
(Extraction Oil & Gas)





# 2016 Bakken Laterals

TD Date vs Lateral Length  
(Continental Resources)



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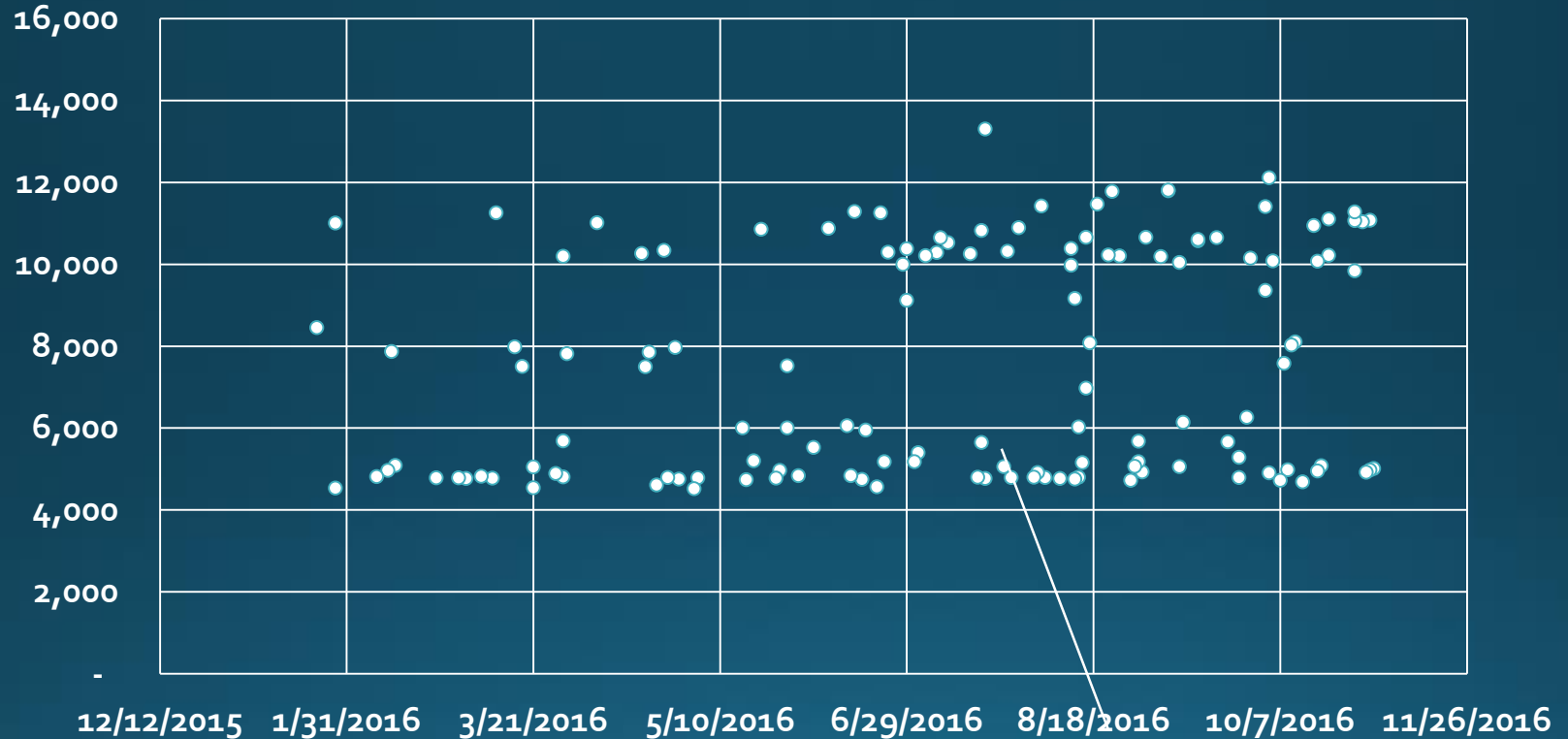
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Here we see  
Continental drill  
extremely long  
laterals due to  
geography

# 2016 Permian Laterals

## TD Date vs Lateral Length (Concho)



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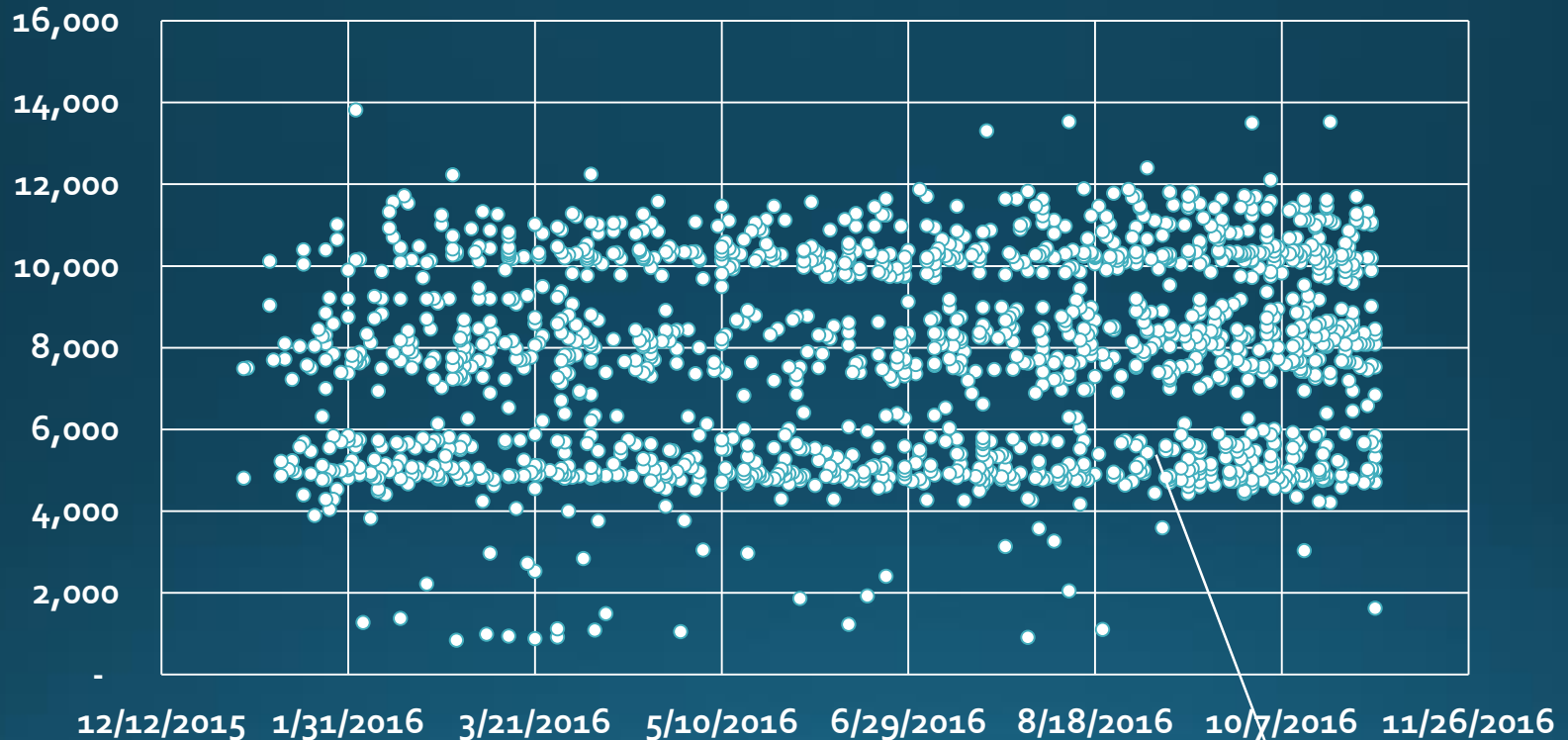
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Here we see  
Concho increasing  
its use of 11,000'  
laterals while not  
abandoning 5,000'.

# 2016 Permian Laterals

## TD Date vs Lateral Length



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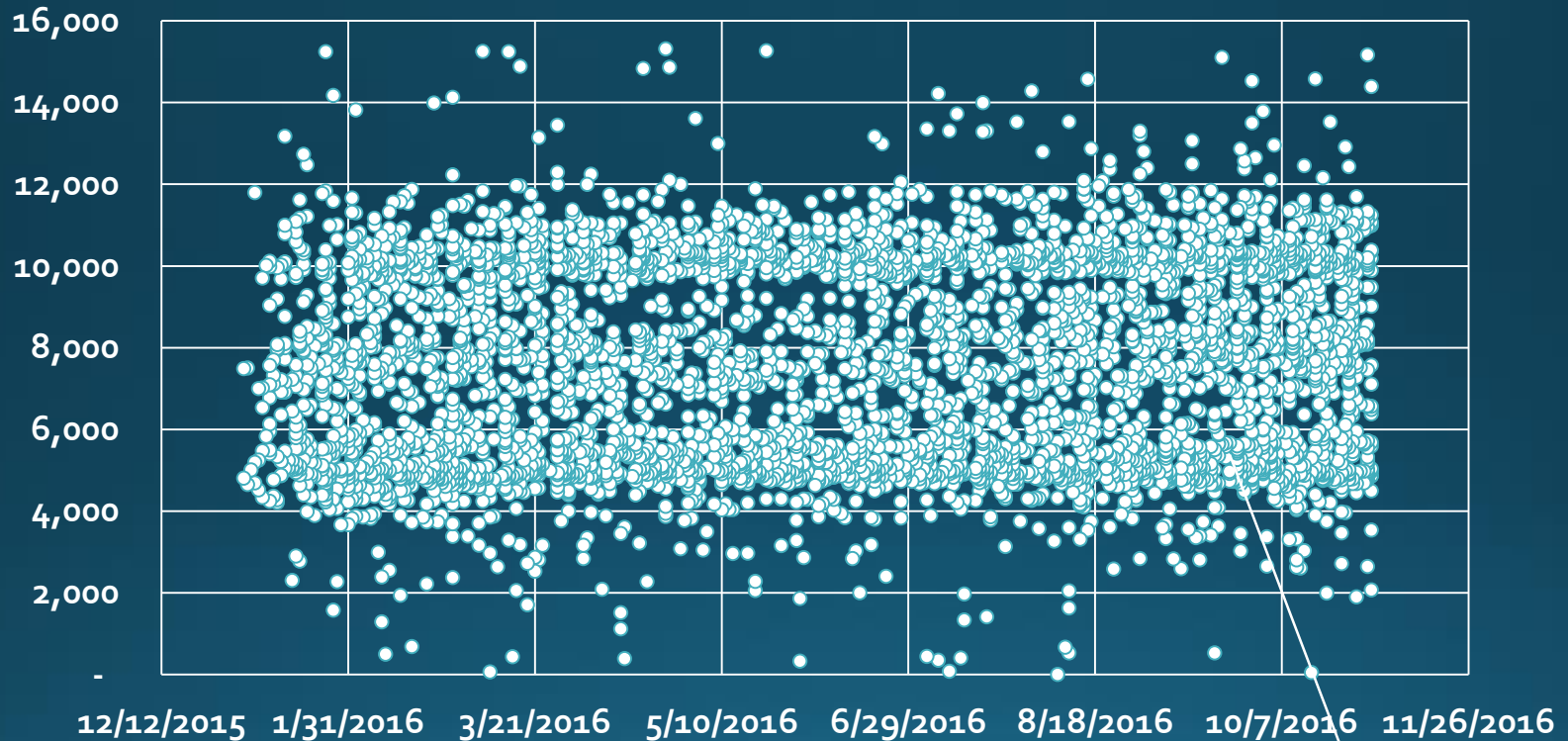
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This is a graph of all Permian horizontal wells. 3 clusters emerge: 5k', 8k' and 11k' drilling.

# 2016 US Laterals

## TD Date vs Lateral Length



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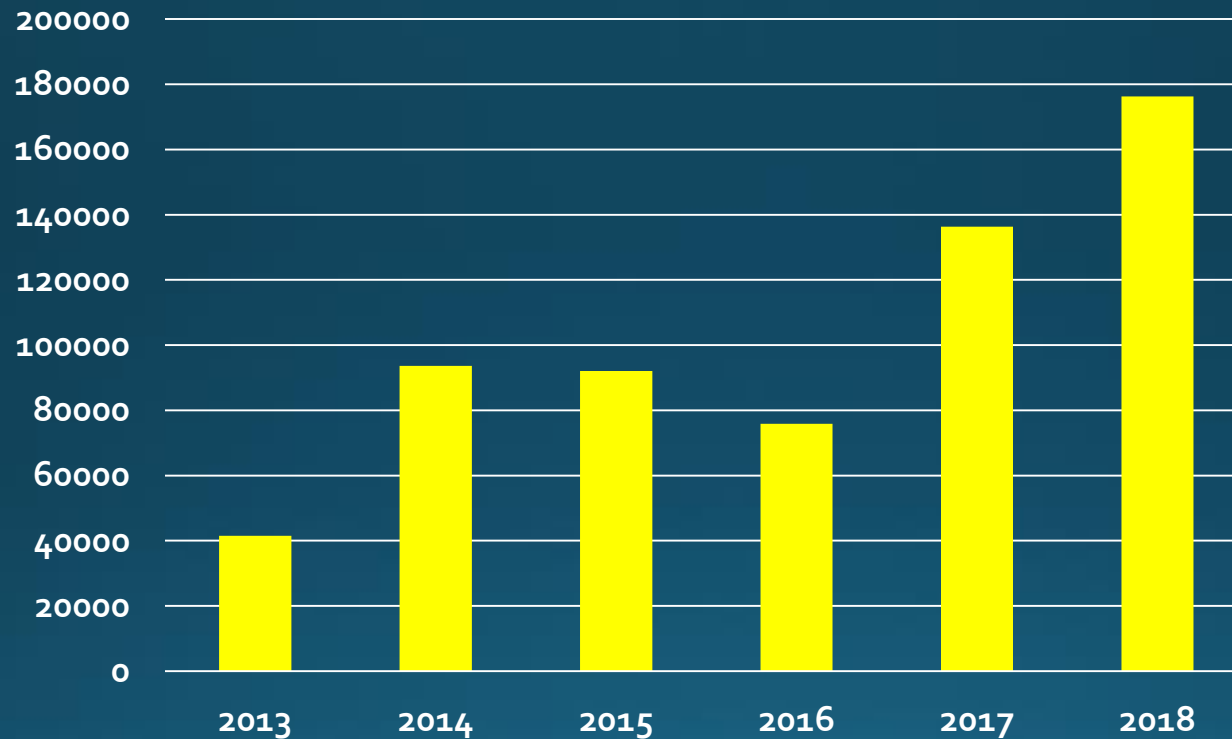
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This is a graph of all US horizontal wells. 3 clusters emerge: 5k', 8k' and 11k' drilling.

# Frac Stages Pumped

## Permian



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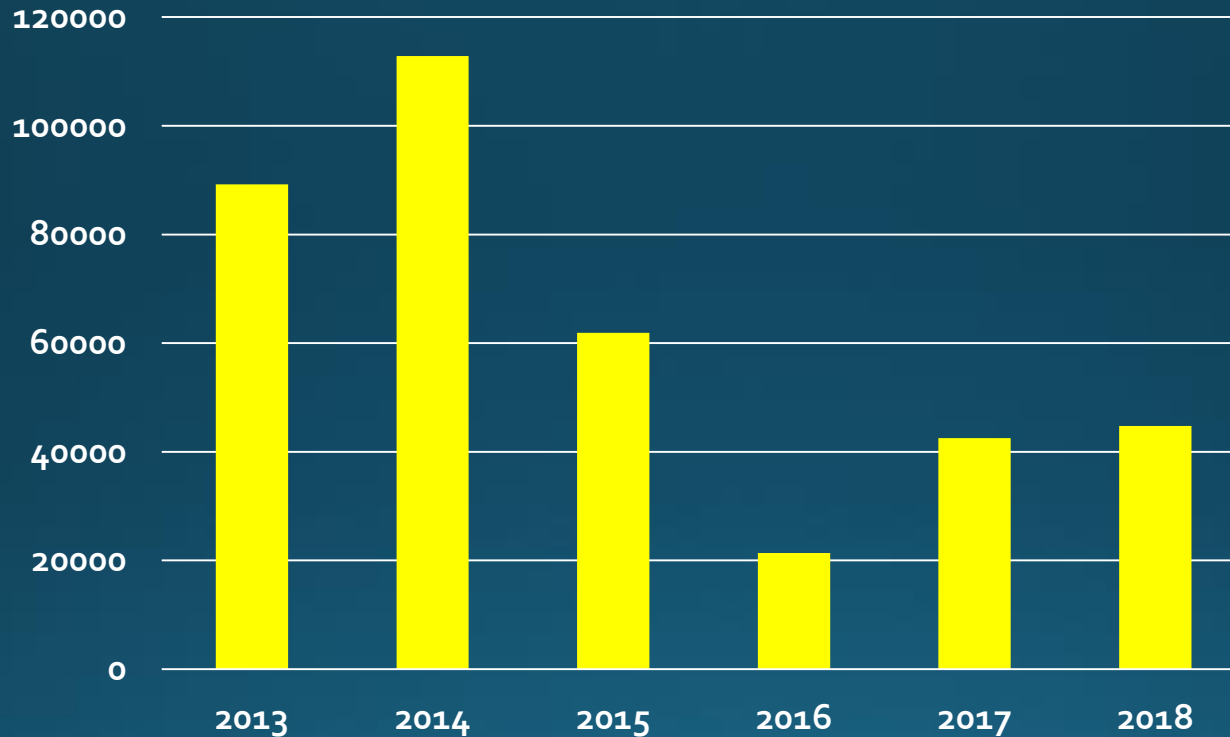
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# Frac Stages Pumped

## Bakken



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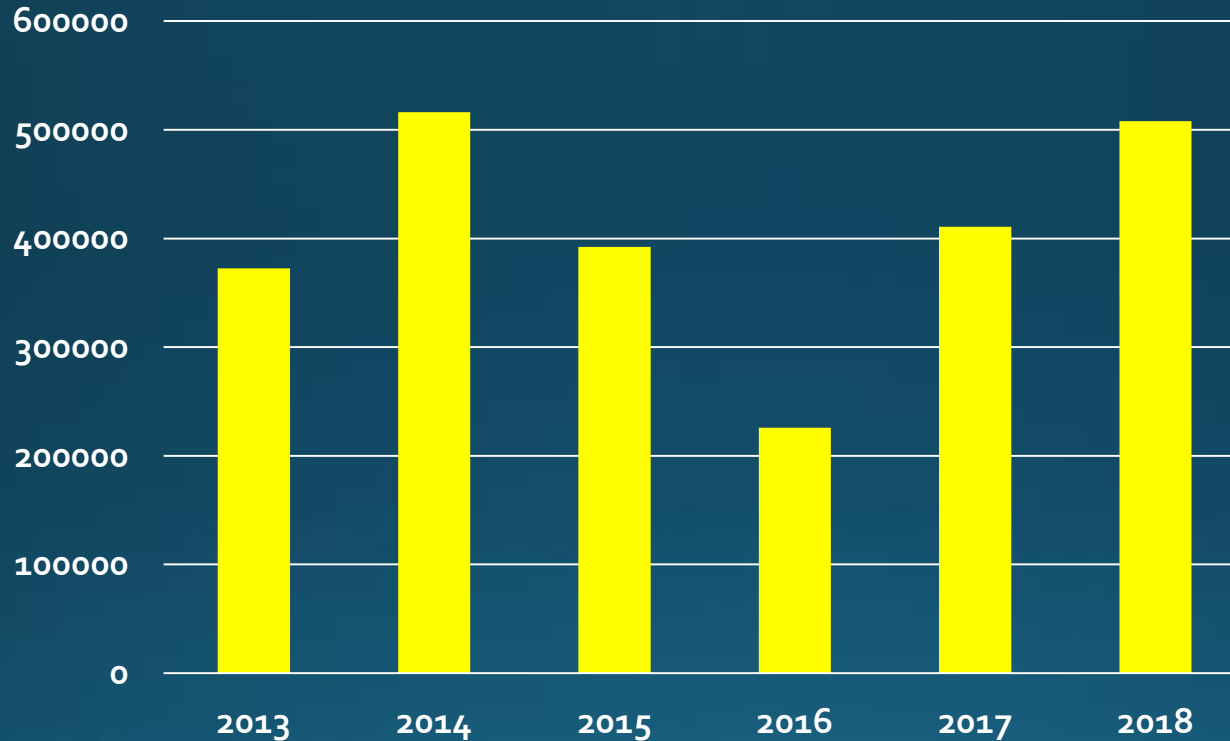
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# Frac Stages Pumped

Total US



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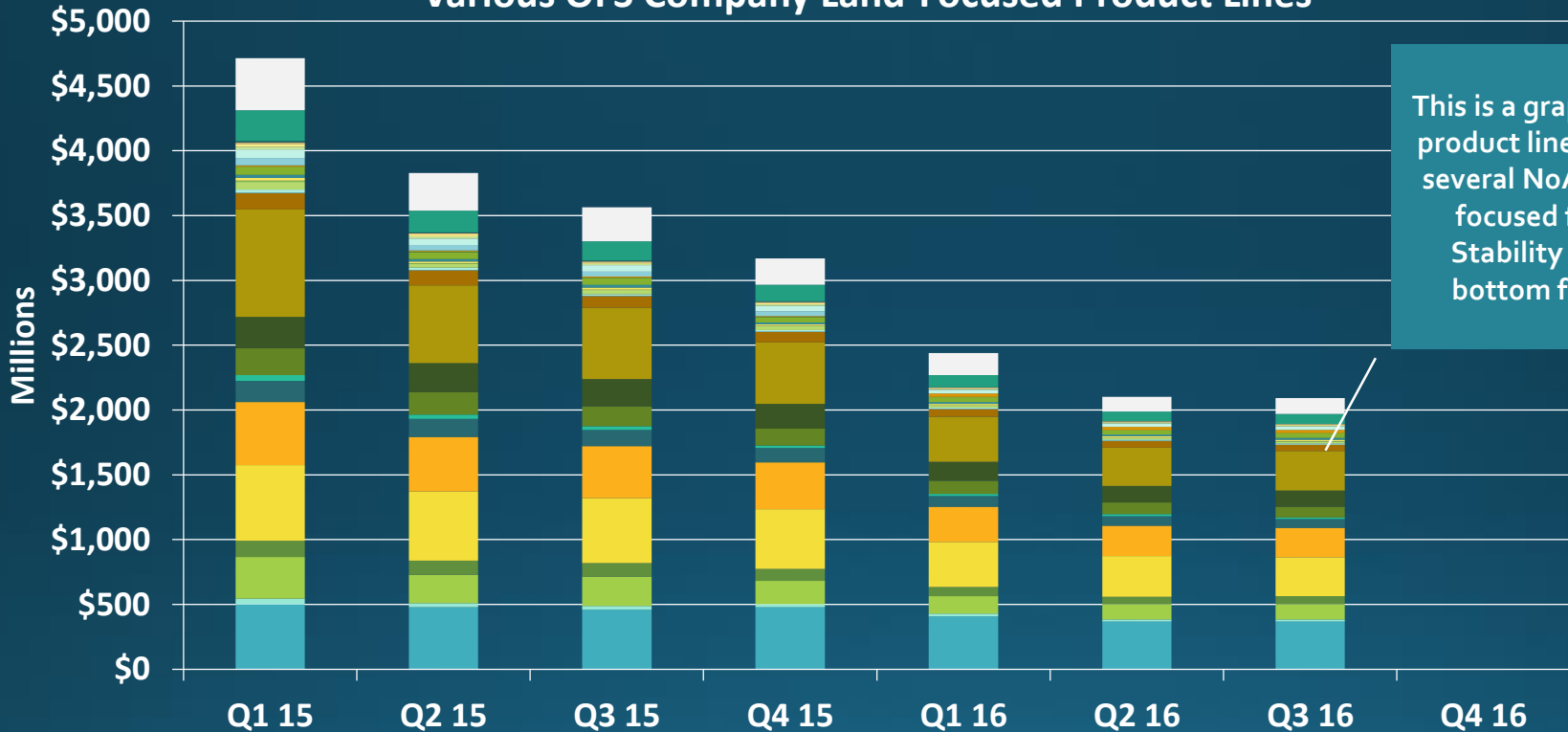
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# Land Quarterly Revenues

Various OFS Company Land-Focused Product Lines



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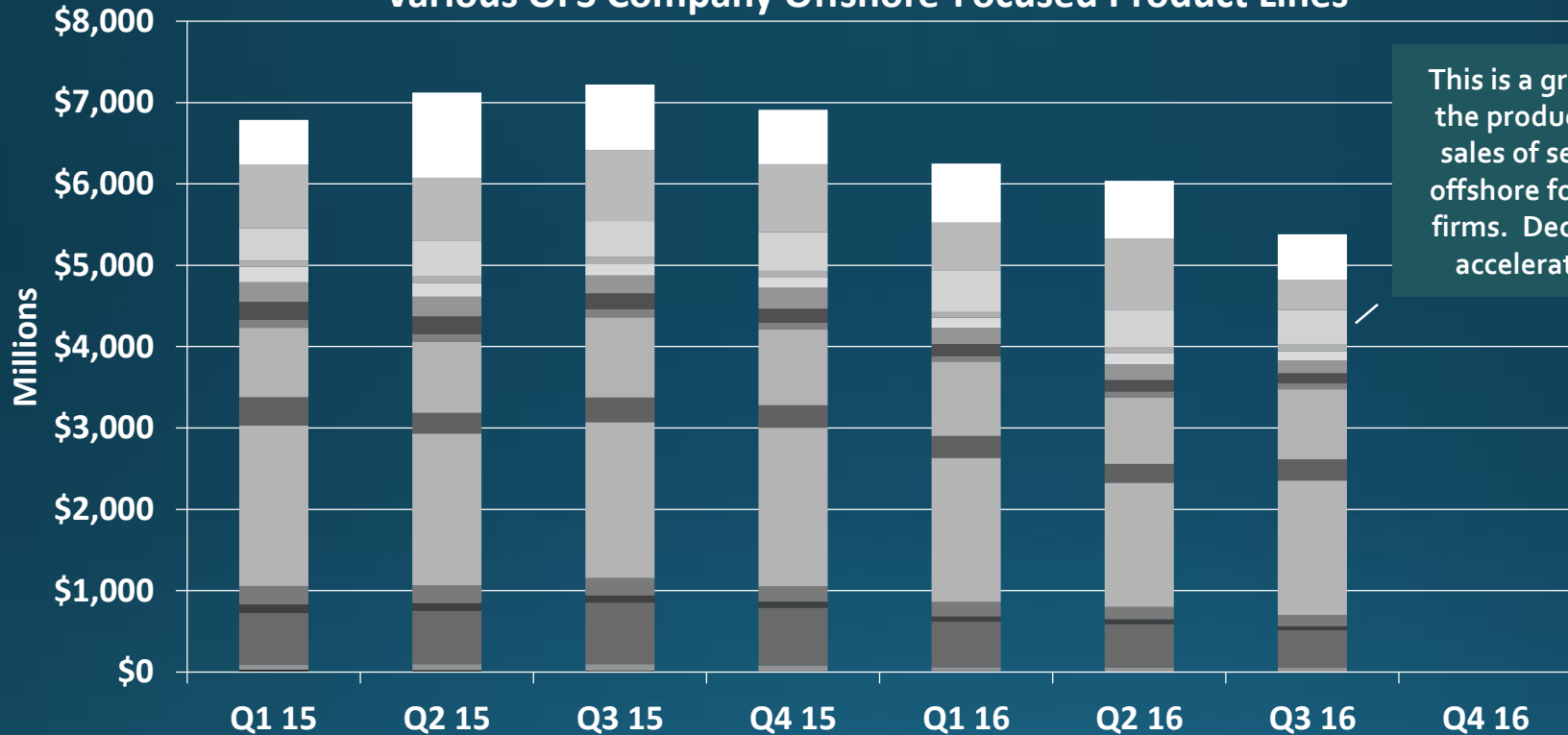
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# Offshore Quarterly Revenues

Various OFS Company Offshore-Focused Product Lines



This is a graph of the product line sales of several offshore focused firms. Decline is accelerating.

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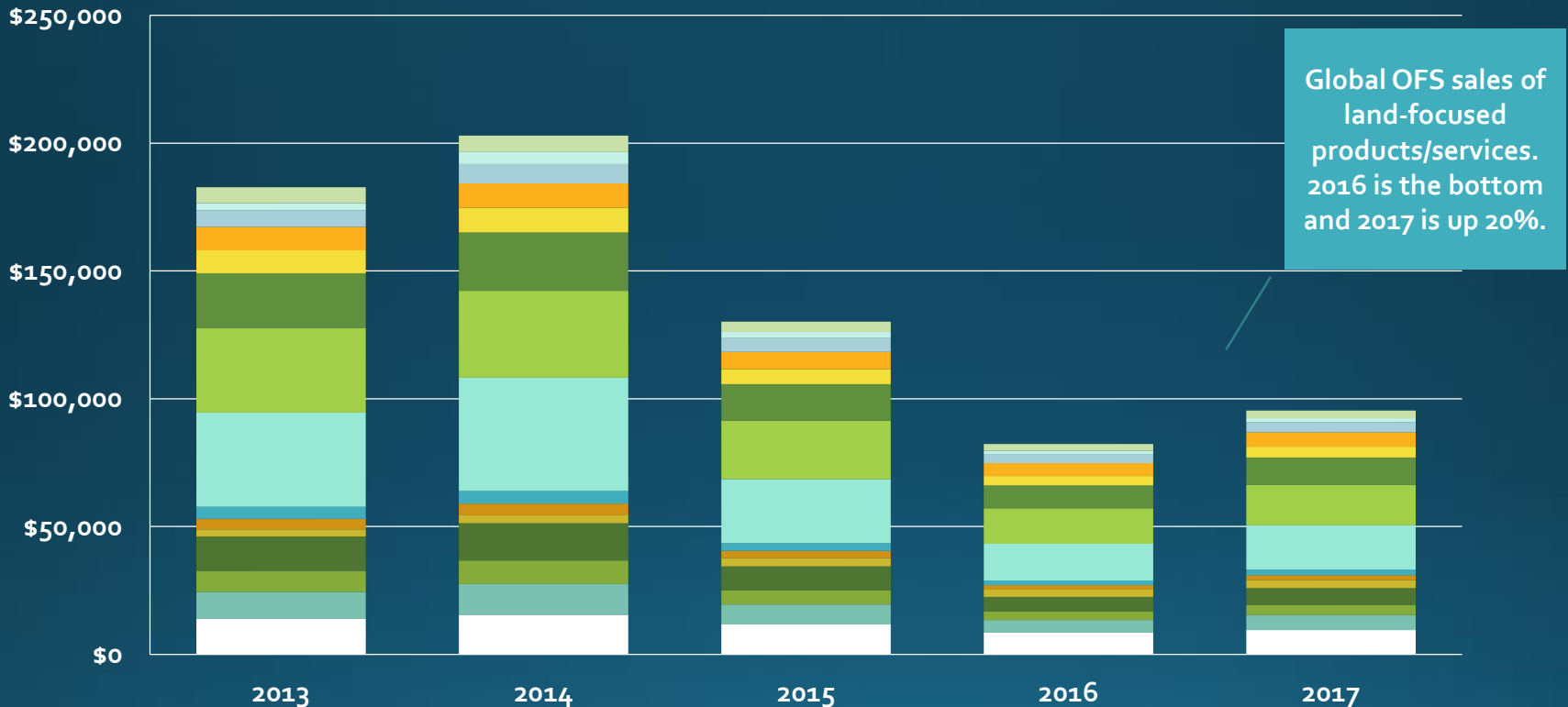
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# Oilfield E/S Markets - Land

Global Revenues of Land-Focused OFS Companies (Millions)



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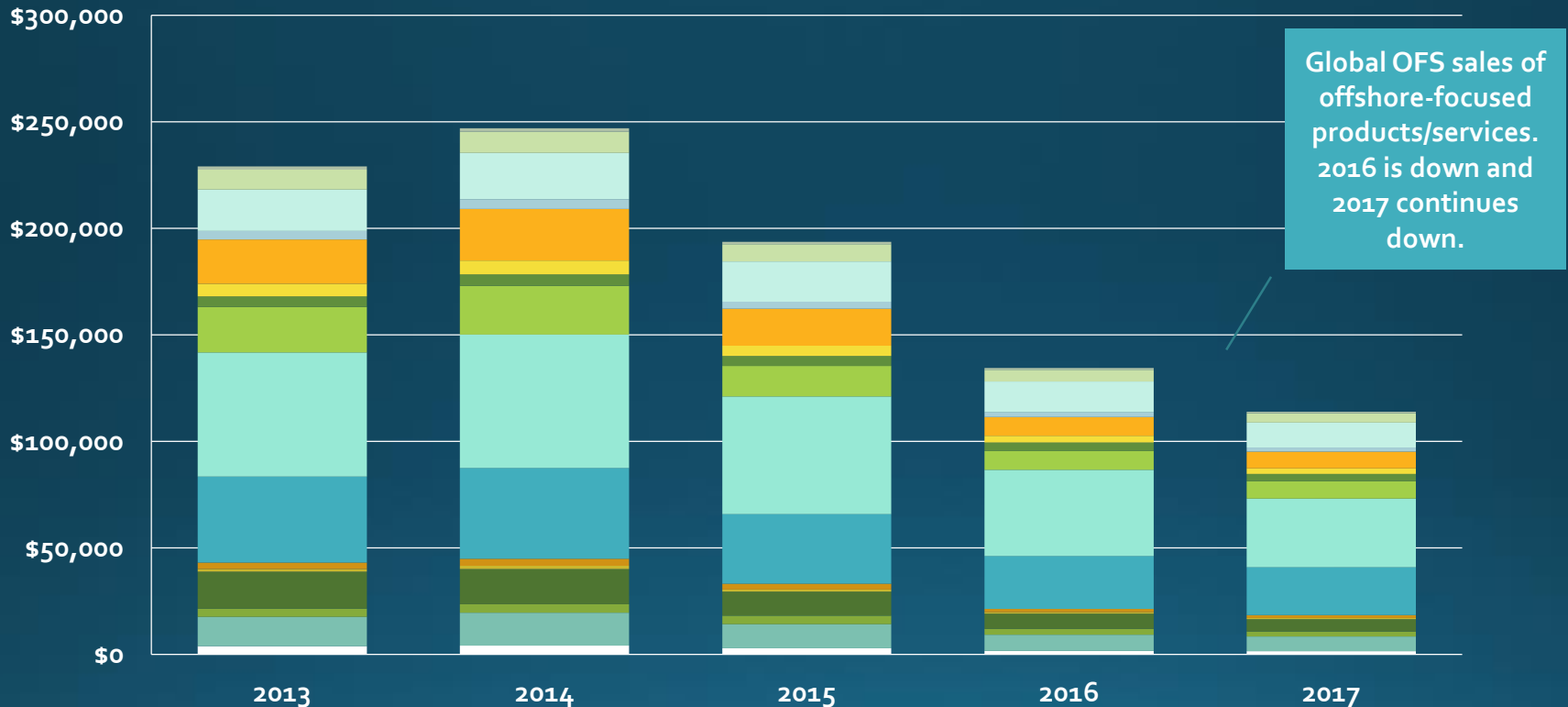
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# Oilfield E/S Markets - Offshore

Global Revenues of Offshore-Focused OFS Companies (Millions)



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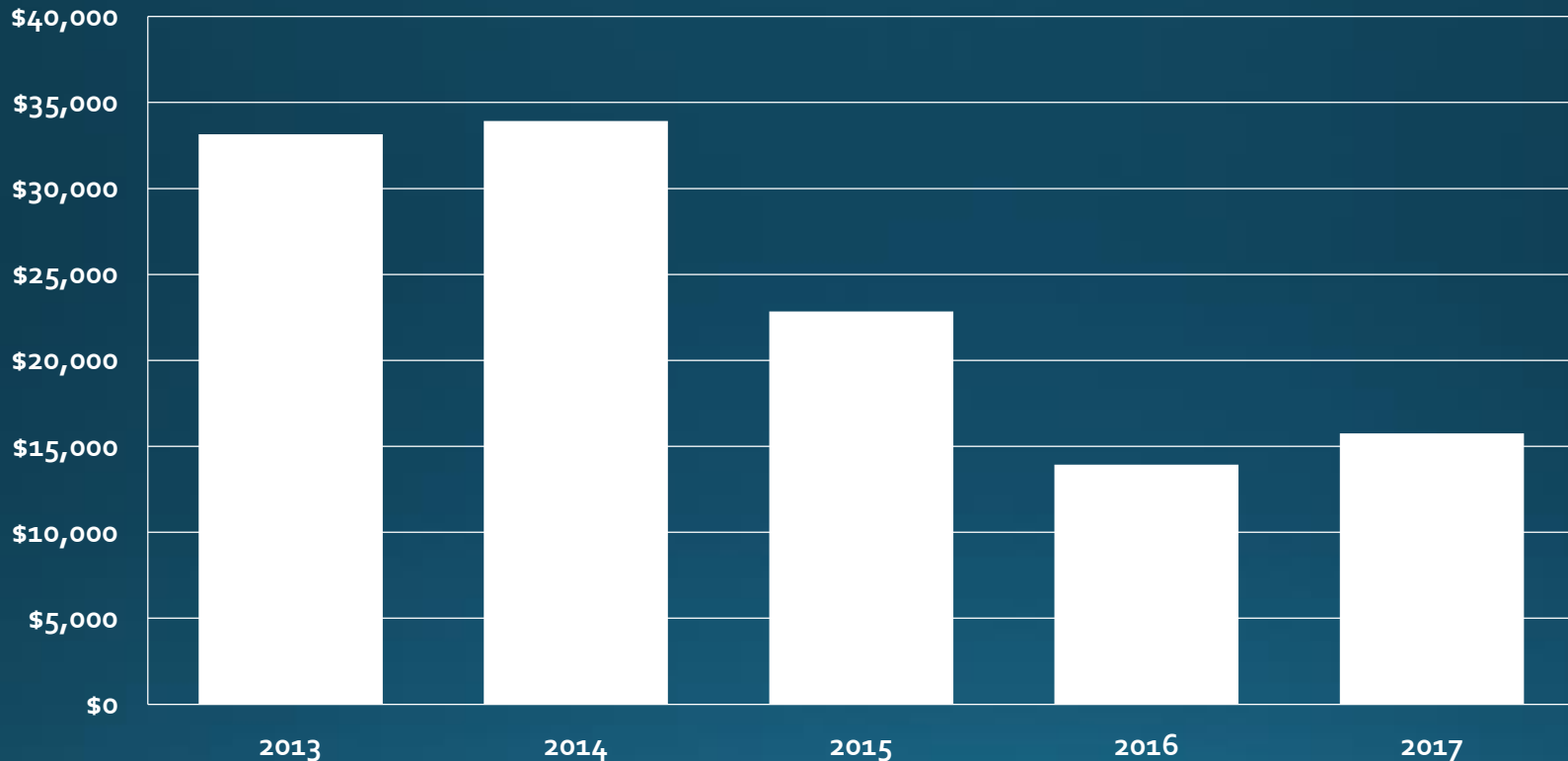
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# Land Drilling Markets

Global Revenues of Land Contract Drillers (Millions)



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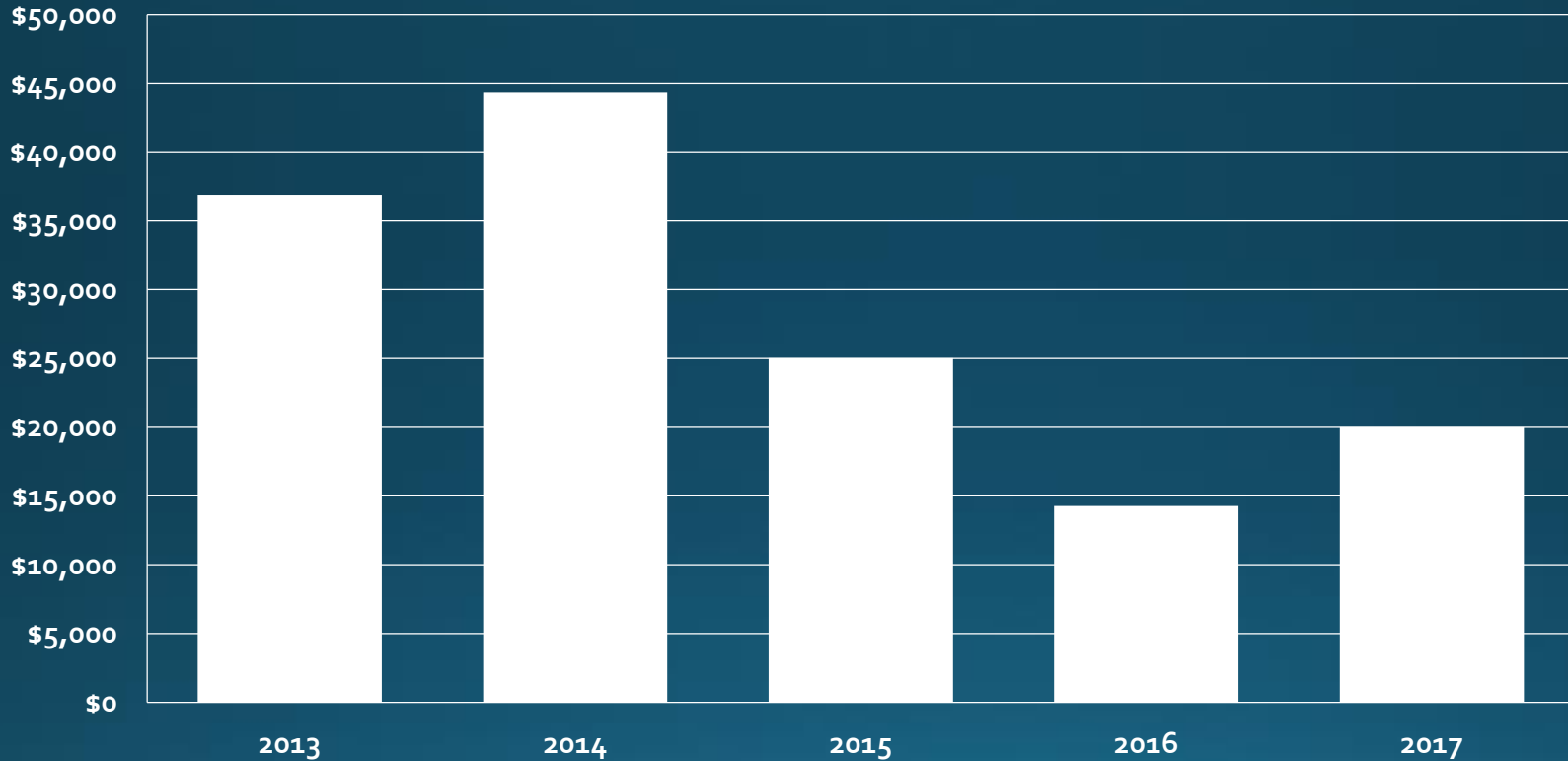
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# Frac Markets

Global Revenues of All Frac Companies (Millions)



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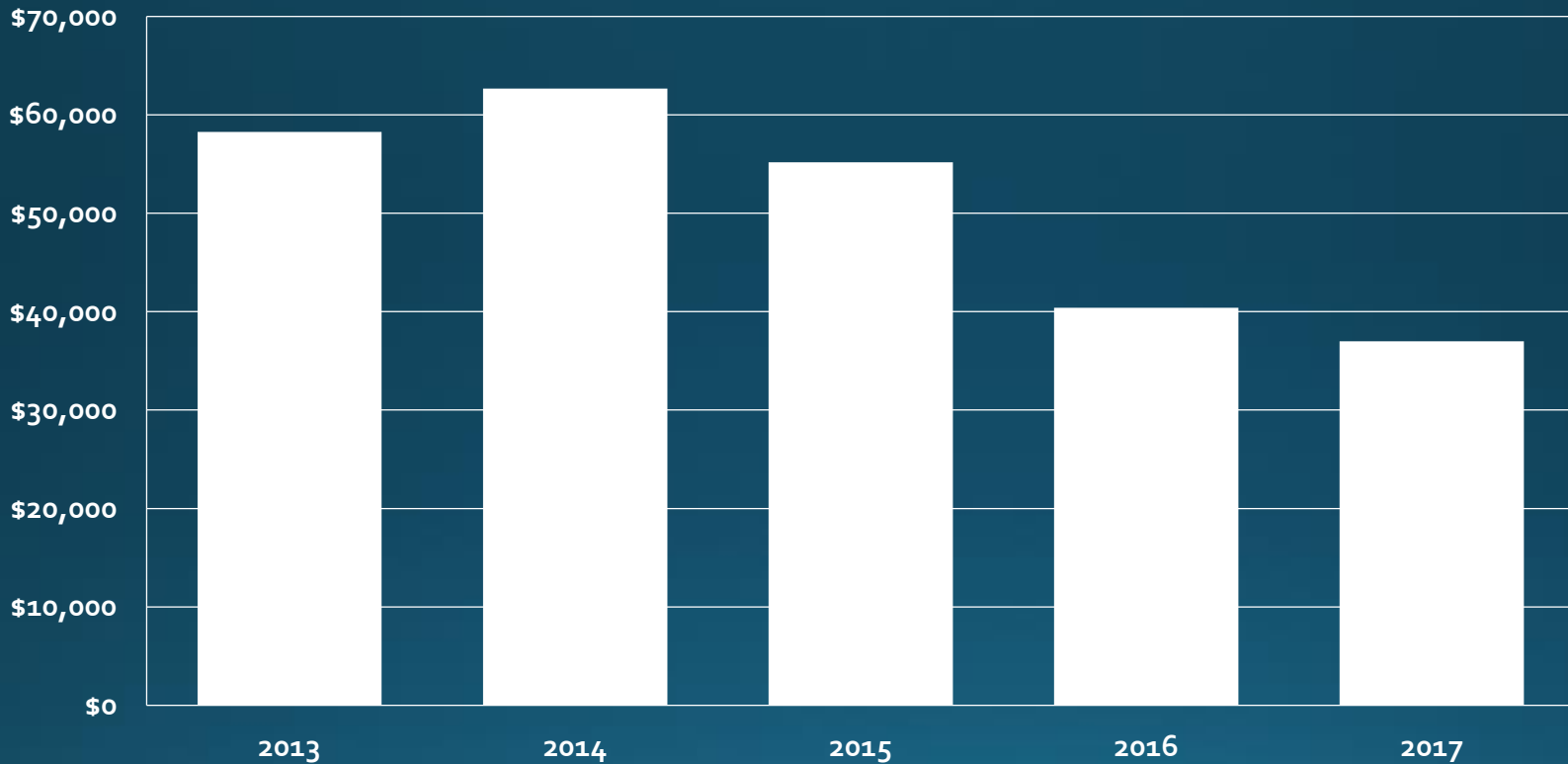
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# Offshore Drilling Markets

Global Revenues of Offshore Contract Drillers (Millions)



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