

ENERGY

INDUSTRY

INSIDER

Q4 2019 Pulse

Smart Home Energy Management Systems

FutureBridge

WHAT'S INSIDE!

- Following the last quarter, this quarter witnessed inflow of multiple new products in the market
- This quarter witnessed introduction of AI powered outdoor security camera and home energy management system
- Smart home start-ups received investments to support product development and business expansion

01

Pulse Themes

- a. New products continue to feature in the smart home market
- b. Start-ups secure funding for business expansion

02

Quarterly review of Technology Developments

- a. AI powered Home Energy Management System

03

Startup Tracker highlights

- a. Summary, investment & funding
- b. Geographical Outlook

01

Emerging Trends

New products continue to feature in the smart home market



- Ezlo innovation announced the first home automation device to combine the features of a smart home hub, smart plug, and energy monitor into a single product, the PlugHub Energy
- It is newest addition to the company's Vera Controller line, it offers value by turning lamps and other standard appliances into smart products, while enabling control of Z-Wave devices such as smart locks, thermostats, sensors, and more



- SnapAV launched the Neo® Remote for Control4®, which comes with a touchscreen that delivers highly-refined control of home entertainment experiences through the powerful Control4 Smart Home OS 3 platform



- SmartRent introduced the Alloy Fusion hub to assist residents for in-home smart devices and enables property owners to offer a seamless unattended experience to prospective renters
- It will also help property managers to provide a seamless digital experience for renters
- The hub also serves as a thermostat, video intercom, multisensor and security panel, among other features



- Enel X launched a new Smart Home system for managing heating, home security and lighting to help families save energy
- This new smart home ecosystem, Homix, developed by Enel X combines Amazon's intelligent cloud-based voice service, Alexa

In-line with previous quarters, this quarter was also marked with multiple product launches. The companies are focusing on expanding their product portfolio by bringing new innovative products to lure more customers. The smart home market is set to grow at a very fast rate as the enhanced human lifestyle is leading to development of new products.

DEVELOPMENTS

Emerging Trends



Following the past trend, smart home market flooded with multiple new products in this quarter. Efficient lighting, thermal comfort and security remained at the core of product development.

FutureBridge
Insight



New products continue to feature in the smart home market



- Acuity Brands, Inc. has introduced its new line of Juno AI™ intelligent LED downlights, which also features Alexa built-in and integrated JBL® speakers
- In addition to the Juno AI Speaker Light with Alexa built-in, the new product line features the companion Juno AI Speaker Light and the Juno AI LED Downlight, both working with Alexa
- The new patent-pending LED easily connect with other compatible smart home devices and deliver voice-service capabilities from their unobtrusive position in the ceiling, enabling easy-to-use and seamless smart home automation



- Blurams launched Outdoor Pro Camera-1080p
- It is AI facial recognition camera which works with Alexa



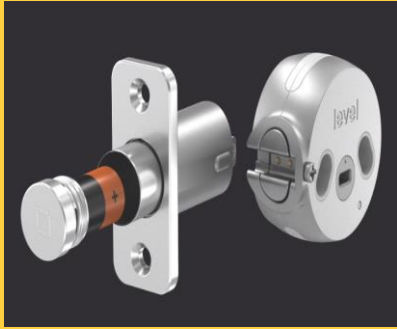
- Domotron launched advanced and user-friendly smart home hub that uses Artificial Intelligence (AI) to learn users' preferences and create personalized automations for existing smart home devices.



- Lenovo India has announced the launch of new smart home devices to expand its IoT and smart home portfolio in India
- The new launches include a smart display, smart bulb, and smart camera, which can be controlled by Google Assistant support



- Resideo Technologies launched its Resideo Home app for whole-home monitoring including the four critical networks of water, air, energy and security
- The app will allow the homeowners to easily connect with professionals who can help ensure home networks are operating efficiently and can intervene to help prevent costly damages, like water leaks and major appliance failures.



Funding support to Level Home's innovative smart lock by retailer Walmart is an indication of them stepping up their competition with the online retail giant Amazon. Notably, Amazon had launched Amazon Key back in October 2017 for convenient home delivery of parcels.

Start-ups secure funding for business expansion



- [Level Home](#) secured \$71M from Walmart for its innovative smart lock that enables remote access and sharing of access to homes
- The Level Home smart lock will allow home delivery of groceries without compromising on security even when user is not at home



- Smart apartment startup [IOTAS](#) has received \$8.5 million of funding from Intel, TELUS Ventures and Liberty Global
- The startup has raised \$17 million till the date
- The company has contracts to supply technology for 10,000 apartments altogether



- [Shine Bathroom](#), a smart home startup from Santa Barbara has raised \$750,000 in seed funding to help build and distribute its first product
- The funding has come from Entrada Ventures and Mucker Capital



- Israeli provider of radar imaging sensor technology, [Vayyar Imaging Ltd.](#), secured \$109 million in its latest financing round led by Koch Disruptive Technologies and also joined by existing investors including Battery Ventures, Bessemer Ventures, ICV, ITI, WRVI Capital and Claltech.



DEVELOPMENTS
Emerging Trends



Following the last quarter, this quarter witnessed investments in smart home start-ups by large investors.

The start-ups seem to grab the market opportunity created by increasing demand of advanced smart home products by developing innovative products.

FutureBridge Insight & What should you investigate ?



→ FutureBridge Insight

Smart home products are evolving day-by-day. Efficient lighting, thermal comfort and security remains at the core of product development.

Start-ups are increasingly receiving investments to commercialize their products and scale up the business.

What should you investigate ?

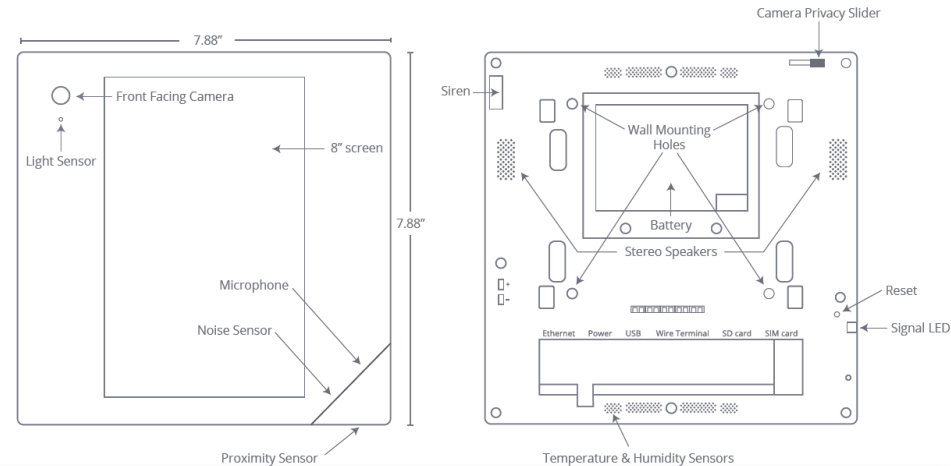


Which are the start-ups that are gaining attention from large investors?



What kind of improvements are taking place in smart home products?

Alloy Fusion by SmartRent



Alloy Fusion All-In-One Touchscreen Hub + Thermostat

- Combination thermostat and smart home panel
- Allows users to control all smart home devices from one location
- On-wall touchscreen unit
- Intuitive interface
- Control: Run a scene, change the temperature, lock or unlock their door, let someone in the building and more
- Can receive video calls remotely from guests, vendors or delivery drivers to grant entry when combined with a community access solution

02

Quarterly review of Technology Developments

AI powered Home Energy Management System

World's First AI Facial Recognition Outdoor Security Camera

Salient Features

- **AI Facial Recognition** – Recognition of persons who appear and receive person notifications – Up to 16 people can be named in the app and lets people know if their family member is back home or if there is a stranger
- **Human Detection** - Push rich notifications instantly when someone appears
- **Compatible with** - Works with Alexa, Person Alerts and Two-Way Audio
- **Pairing** – App pairs with Apple Watch, iPhone and Android smartphones

Outdoor Pro Camera – 1080p

Specification

- **Viewing Angle** – 129° wide angle
- **Operating Temperature** – - 20°C to 60°C
- **Video Streams** – 1080P
- **Alert Information** – Sound/Motion/Human Detection
- **Image Sensor** – 1/2.8" 2MP CMOS Sensor

blurams Cloud can achieve Real-time detection and analysis response at the millisecond level of face detection

It enables the face recognition technology to realize fast processing in the non-cooperative mode

Both AI powered systems were launched in **Nov 2019**

blurams



DOMOTRON

AI – Powered Smart Home Solution



Smart Home Hub

Salient Features

- Smart home hub **learns from customers' preferences**. It recommends customized automations, schedules and routines based on how a family or user interacts
- It **communicates with other smart devices** by answering a few questions based on how people use these devices
- It utilizes **touch-enabled wireless switches with sensors**. These include sensors for humidity, ambient light, air quality, temperature and presence

- **Communication System** – Equipped with ZigBee 3.0

Compatible with following



Smart home solution app features a timeline. This timeline displays the events that have happened.

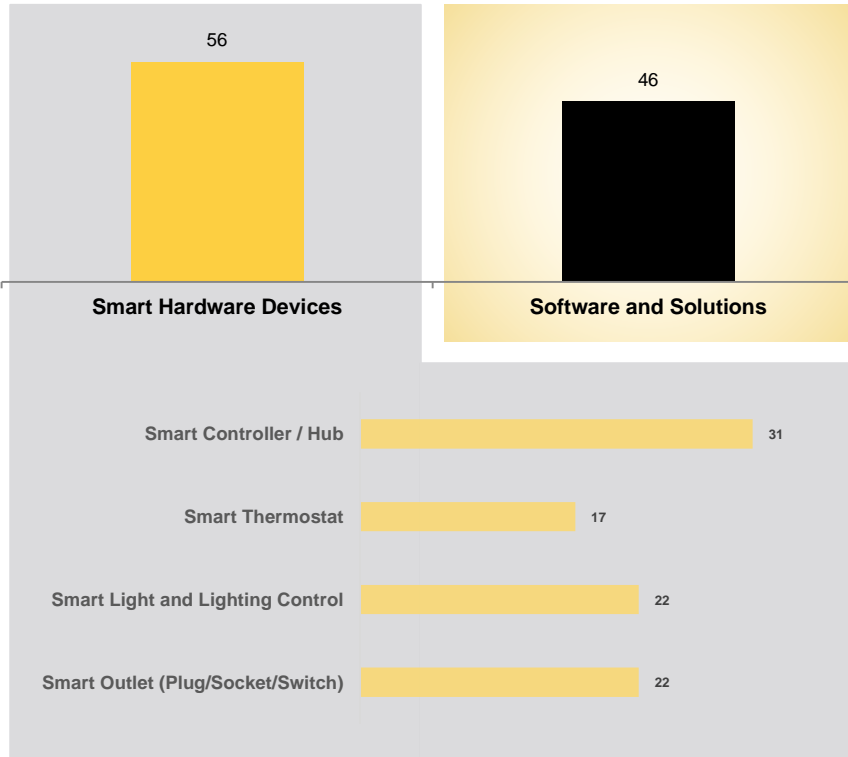
It also provides planned automations which gives users total control over the system.

03

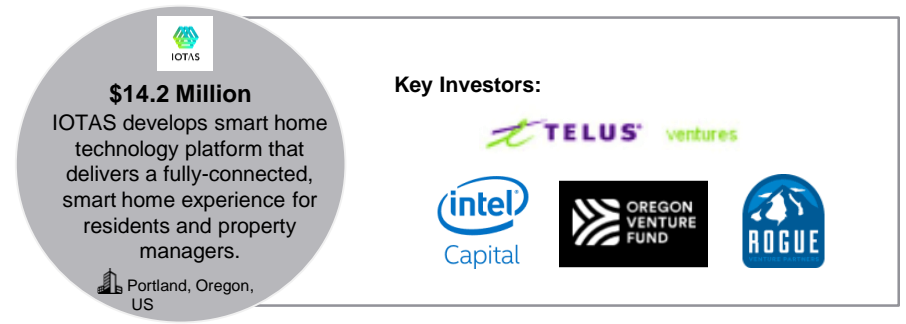
Startup Tracker highlights

Startup Tracker Summary Q4 2019

Distribution by technology segmentation

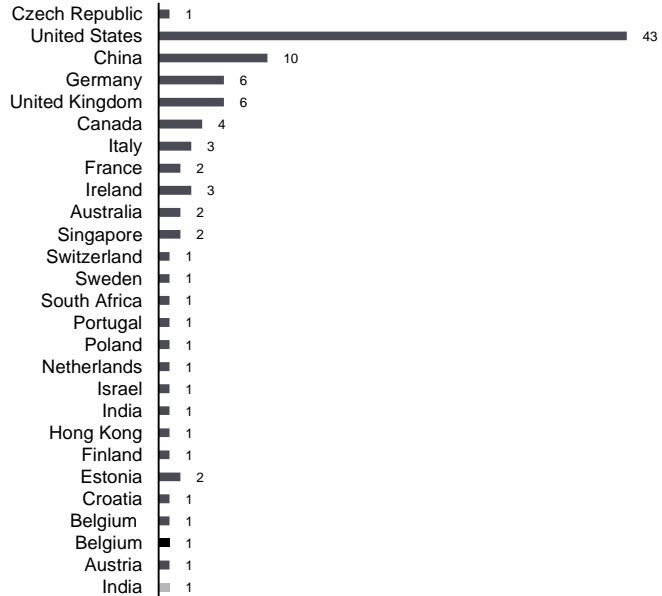


Funding distribution & activities



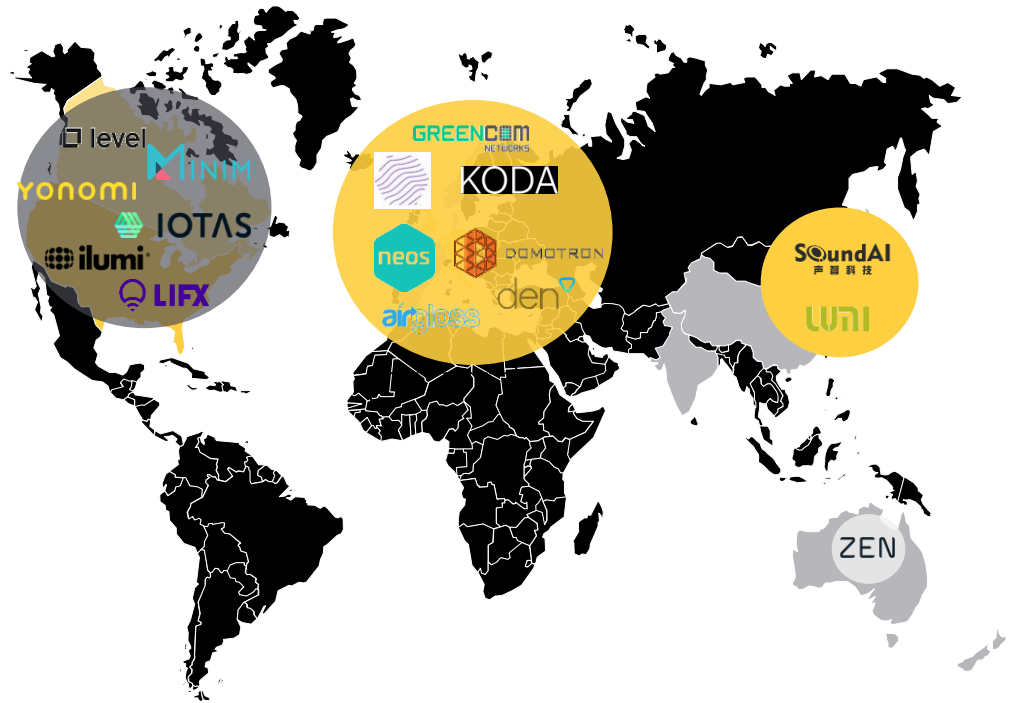
What are the hubs of startup?

Distribution of Start-ups by Country



USA followed by China are predominantly the hub of Startups in HMS sector.

Key startups from major hubs



North America

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