

## About Star America

### Strict Focus on Infrastructure

- Management has years of experience advising clients in the Infrastructure Industry
- Unique experience as a partner and advisor to many of the largest U.S. Based and International clients

### Corporate Advisory Services

- Buy Side M&A Services
- Sell Side M&A Services
- Strategic Consulting
- Financial Analysis & Restructuring
- Executive Placement

### Project Advisory Services

- DBF Advisory Services
- Project Finance Advisory
- Project team development services
- Outsourced Business Development
- Subcontractor vetting & analysis services

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## Company Comparison





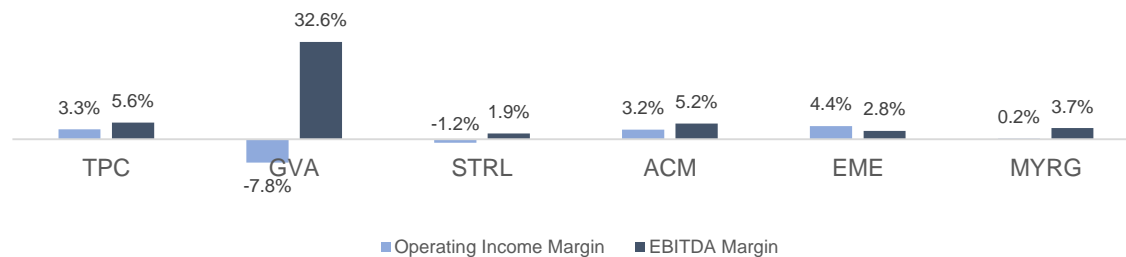



### Operating Metrics\*

<b>1Q 2017 Revenue**</b>	1,117	468	153	8,785	1,892	300
<b>Operating Income Margin</b>	3.3%	-7.8%	-1.2%	3.2%	4.4%	0.2%
<b>EBITDA Margin</b>	5.6%	32.6%	1.9%	5.2%	2.8%	3.7%
<b>Cash Flow From Operations</b>						
	7,170	3,484	925	42,400	3,974	660
<b>Backlog Months</b>	17.2x	16.6x	15.5x	29.0x	6.2x	6.7x
<b>Book-To-Bill</b>	0.8x	1.2x	1.1x	1.2x	1.0x	1.2x
<b>Enterprise Value</b>	1,526	2,208	204	8,964	3,828	691
<b>Market Cap.</b>	2,141	2,116	235	5,302	3,709	654

### Trading Metrics^

<b>Enterprise Value-To-Revenue</b>	0.4x	0.9x	0.3x	0.5x	0.5x	0.6x
<b>Enterprise Value-To-EBITDA</b>	7.4x	13.1x	11.4x	10.5x	9.0x	8.7x
<b>Price-To-Book</b>	1.0x	2.3x	2.2x	1.4x	2.4x	2.5x



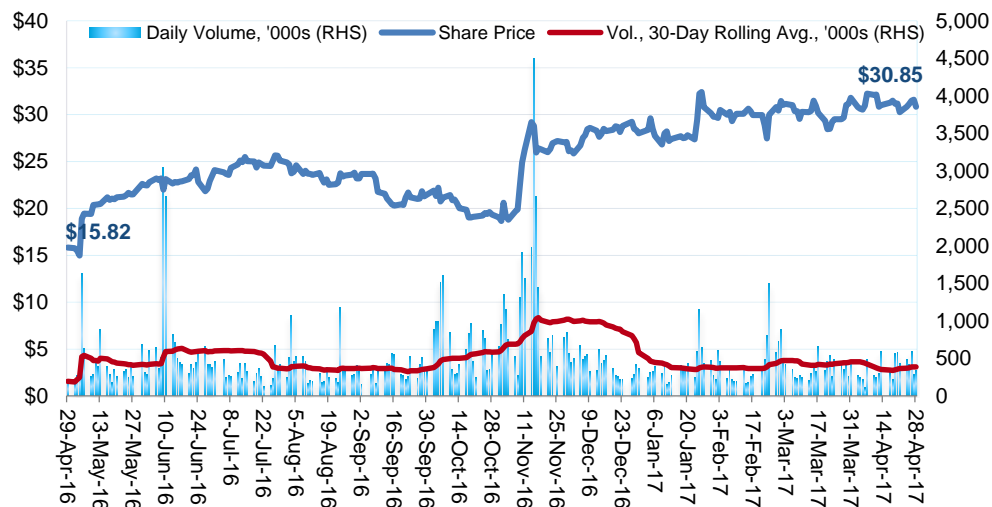
\* Operating Metrics based on 12/31/16

\*\* ACM Results 1H 2017

^ Trading Metrics based on 30 day average as of 3/17/17

# Company Snapshot – Tutor Perini Corporation

## Price/ Volume

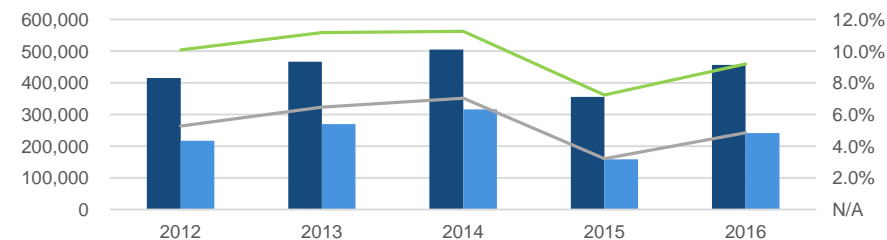


## Valuation ( \$ '000s, except per share data )

30-Day Avg. Share Price (as of 4/28/17)	30.70
52-Week High	32.40
52-Week Low	14.99
<b>Market Cap</b>	<b>1,525,606</b>
Total Debt	780,789
Total Cash	164,975
<b>Enterprise Value</b>	<b>2,141,420</b>
Book Value	1,560,127
Goodwill & Intangibles	677,117
<b>Tangible Book Value</b>	<b>883,010</b>

## Income Overview

(In U.S.\$000s)	2012	2013	2014	2015	2016
Total Revenue	4,111,471	4,175,672	4,492,309	4,490,472	4,493,076



## Valuation Multiples

	2014	2015	2016	1Q2017
<b>Backlog (\$ Millions)</b>	7,831	7,465	6,227	7,170
<b>Backlog Months</b>	20.9x	18.2x	15.0x	17.2x
<b>Book-To-Bill</b>	1.2x	0.9x	0.8x	0.8x
<b>Enterprise Value / Revenue</b>	0.4x	0.3x	0.4x	0.4x
<b>Enterprise Value / EBITDA</b>	5.9x	8.7x	7.3x	7.4x
<b>Enterprise Value / EBIT</b>	7.7x	13.0x	10.2x	10.8x
<b>Price / Earnings</b>	10.8x	14.8x	15.5x	16.2x
<b>Price / Book Value</b>	0.9x	0.5x	1.0x	1.0x
<b>Price / Tangible Book Value</b>	1.7x	0.9x	1.7x	1.7x

## Balance Sheet & Debt Summary

### Debt Summary

Debt Structure:	2015	2016
\$250M 4.68% Term Loan (Matures May 1, 2018):	222,120	54,650
5.05% Revolver (\$300MM Capacity, Matures May 1, 2018):	155,815	147,990
2010 \$300M 7.625% Senior Notes (Matures Nov. 1, 2018):	297,118	298,120
\$200M 2.875% Convertible Notes:	-	152,668
1.9% - 5.93% Equipment Financing & Mortgages:	133,288	101,558
Other Indebtedness:	9,343	4,533
<b>Total Debt:</b>	<b>817,684</b>	<b>759,519</b>
<b>Cash Interest Expense:</b>	<b>2015</b>	<b>2016</b>
2014 Credit Facility:	14,368	19,201
2010 Senior Notes:	22,875	22,875
Convertible Notes:	-	3,115
Other Interest:	5,805	3,623
<b>Total Cash Interest Expense:</b>	<b>43,048</b>	<b>48,814</b>

### TPC Historical Balance Sheet

(In U.S. \$'000s, except per share data)

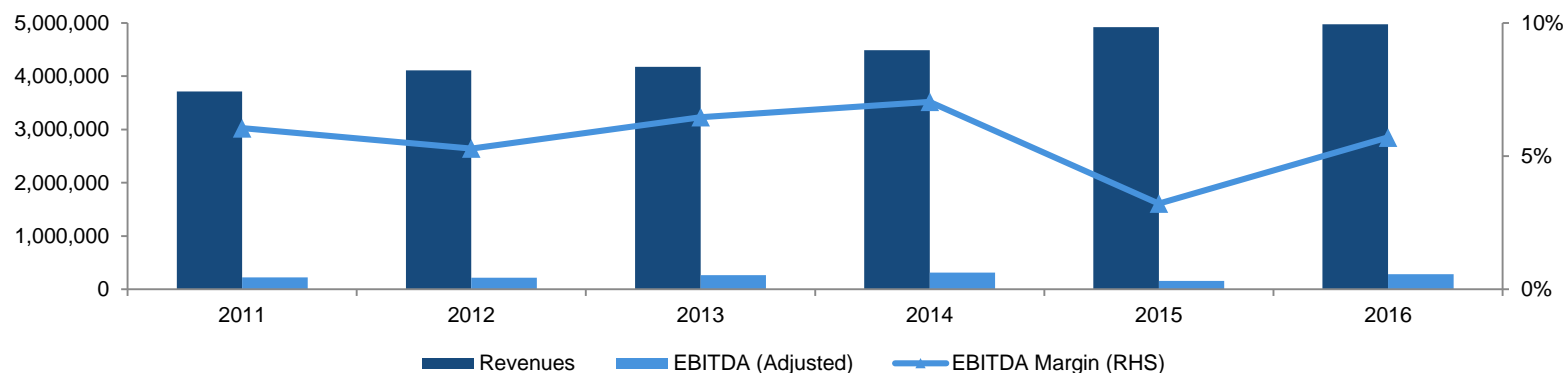
	2014	2015	2016	1Q 2017
<b>Assets:</b>				
Cash	135,583	75,452	146,103	104,817
Restricted Cash	44,370	45,853	50,504	60,158
Accounts Receivable	1,479,504	1,473,615	1,743,300	1,749,602
Costs and Estimated Earnings in Excess of Billings	726,402	905,175	831,826	840,760
Other Current Assets	86,697	108,844	66,023	58,482
<b>Total Current Assets</b>	<b>2,472,556</b>	<b>2,608,939</b>	<b>2,837,756</b>	<b>2,813,819</b>
PP&E	527,602	523,525	477,525	462,695
Goodwill & Intangibles	685,260	681,546	678,003	677,117
Other Noncurrent Assets	87,897	47,290	45,235	44,852
<b>Total Assets</b>	<b>3,773,315</b>	<b>3,861,300</b>	<b>4,038,620</b>	<b>3,998,483</b>
<b>Current Maturities of LT Debt</b>	<b>81,292</b>	<b>88,917</b>	<b>85,890</b>	<b>27,598</b>
Accounts Payable	798,174	937,464	994,016	965,931
Billings in Excess of Costs and Estimated Earnings	319,296	288,311	331,112	288,795
Accrued Expense and Other Liabilities	159,814	159,016	107,925	112,448
<b>Total Current Liabilities</b>	<b>1,358,576</b>	<b>1,473,708</b>	<b>1,518,943</b>	<b>1,394,772</b>
Long-Term Debt	784,067	728,767	673,629	753,191
Other Long-Term Liabilities	114,796	122,822	131,007	159,777
Deferred Income Taxes	150,371	140,665	162,018	130,616
<b>Total Liabilities</b>	<b>2,407,810</b>	<b>2,441,073</b>	<b>2,485,597</b>	<b>2,438,356</b>
<i>Shareholders' Equity</i>	<i>1,365,505</i>	<i>1,420,227</i>	<i>1,553,023</i>	<i>1,560,127</i>
<b>TOTAL LIABILITIES AND SHAREHOLDERS' EQUITY</b>	<b>3,773,315</b>	<b>3,861,300</b>	<b>4,038,620</b>	<b>3,998,483</b>
Working Capital Ratio	1.8x	1.8x	1.9x	2.0x
Total Debt	865,359	817,684	759,519	780,789
Net Debt	729,776	742,232	613,416	675,972
Backlog	7,831,725	7,465,129	6,227,137	7,170,500
Cash Flow From Operations	(56,678)	14,072	113,336	64,547

## Income Statement

### TPC Historical Income Statement

(In U.S. \$'000s, except per share data)

	2012	2013	2014	2015	2016	Quarterly Results	
						1Q 2016	1Q 2017
Total Revenue	4,111,471	4,175,672	4,492,309	4,920,472	4,973,076	1,085,369	1,117,361
Operating Income (Loss)	221,811	203,822	241,690	105,413	201,920	40,122	37,017
Margin (%)	- 5.4%	4.9%	5.4%	2.1%	4.1%	3.7%	3.3%
Depreciation & Amortization	61,457	59,410	53,702	41,634	67,302	12,809	20,996
Share Based Compensation	9,470	6,623	18,615	9,477	13,423	3,657	4,306
Goodwill & Intangible Asset Impairment	376,574	-	-	-	-	-	-
<b>EBITDA (Adjusted)</b>	<b>225,690</b>	<b>269,855</b>	<b>314,007</b>	<b>156,524</b>	<b>282,645</b>	<b>56,588</b>	<b>62,319</b>
Margin (%)	5.5%	6.5%	7.0%	3.2%	5.7%	5.2%	5.6%
<b>Net Income (Loss)</b>	<b>265,400</b>	<b>87,296</b>	<b>107,936</b>	<b>45,292</b>	<b>95,822</b>	<b>15,400</b>	<b>137,674</b>
Margin (%)	- 6.5%	2.1%	2.4%	0.9%	1.9%	1.4%	12.3%



## Recent News & 4Q 2016 Conference Call Notes

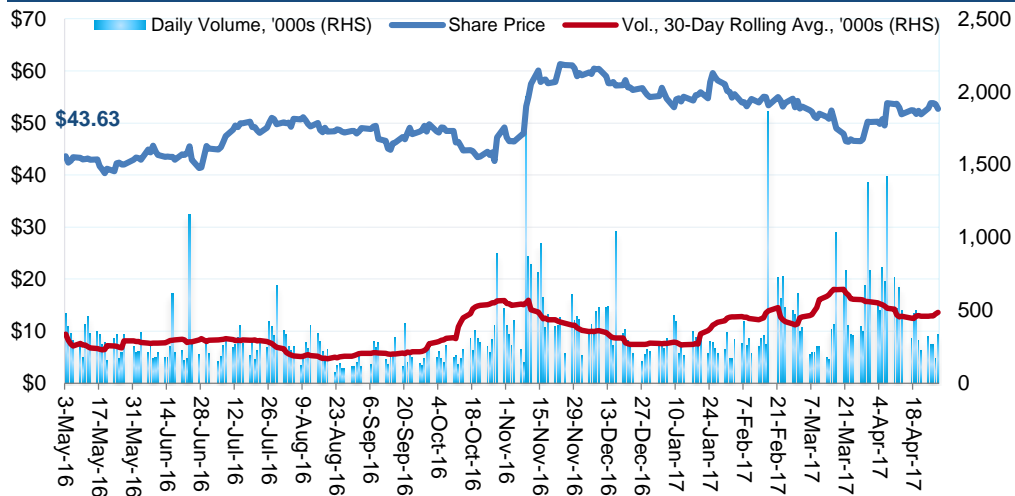
### Recent News

- **May 5, 2017:** TPC announced that its subsidiary, Lunda Construction, has been awarded a contract for the \$322.7MM I-74 Steel Twin Arch Bridge Replacement Project in Iowa. Lunda's Scope of work includes construction of two bridges, each measuring 3,396 feet. Construction on the new bridges is expected to begin in the summer of 2017, with substantial completion expected in the fourth quarter of 2020.
- **May 2, 2017:** TPC was awarded a \$291.5MM contract by the New York Metropolitan Transportation Authority for the Mid-Day Storage Yard Facility encompassing approximately 33 acres from west to east within the Harold Interlocking in Queens, NY. Construction is expected to begin in the Spring of 2017, with substantial completion expected in the third quarter of 2020.
- **May 2, 2017:** TPC is the selected proposer on a \$82.2MM contract for the New York Metropolitan Authority to provide Design-Build Services for the Henry Hudson Bridge in New York City. Work is expected to begin in the Spring of 2017, with substantial completion anticipated in the summer of 2020.
- **May 2, 2017:** The Maryland Department of Transportation has awarded TPC a \$77.9MM contract for the MD 4 at Suitland Parkway Interchange Improvements Project in Prince George's County, MD. Construction is expected to begin in the Spring of 2017, with substantial completion anticipated in the third quarter of 2020.
- **April 10 – 17:** TPC announced it issued \$500MM of Senior Secured Notes at 6.875% due 2025. TPC intends to use the proceeds to repurchase its outstanding 7<sup>5/8</sup>% Senior Notes due 2018.

### Conference Call Notes

- "Beyond the Trump infrastructure plan and the passage last November of ~\$200B at new voter approved funding, there has been another favorable recent development. In early April, the California Legislature passed SB 1, or the Road Repair and Accountability Act of 2017. The bill is expected to raise \$52.4B over ten years for critical road repairs and other important transportation projects."
- Major revenue contributors in the first quarter for the specialty contractor segment included its subsidiary Five Star Electric's work on the CS 179 East Side Access Project, the Hudson Yards platform and tower electrical subcontracts in New York City. Overall, revenue and income for the specialty contractor segment grew year-over-year and the segments overall operating margins were stronger and is now approaching the 5%-7% target range.

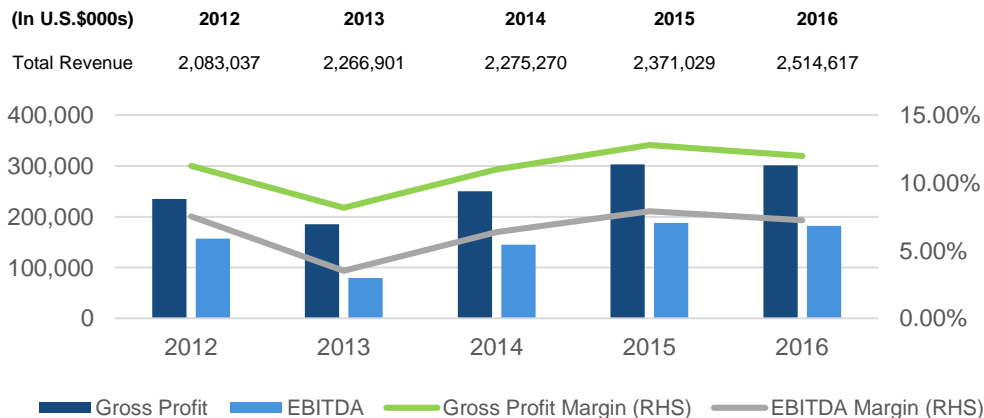
## Price/ Volume



## Valuation ( \$ '000s, except per share data )

30-Day Avg. Share Price (as of 4/28/17)	51.72
52-Week High	61.30
52-Week Low	40.33
<b>Market Cap</b>	<b>2,046,026</b>
Total Debt	244,294
Total Cash	189,326
Noncontrolling Interest	36,603
<b>Enterprise Value</b>	<b>2,137,597</b>
Book Value	922,591
Goodwill & Intangibles	53,799
<b>Tangible Book Value</b>	<b>868,792</b>

## Income Overview



## Valuation Multiples

	2015	2016	1Q2017
<b>Backlog (\$ Millions)</b>	2,718	3,088	3,484
<b>Backlog Months</b>	14.3x	15.6x	16.6x
<b>Book-To-Bill</b>	1.1x	1.2x	1.2x
<b>Enterprise Value / Revenue</b>	0.6x	0.7x	0.9x
<b>Enterprise Value / EBITDA</b>	9.8x	8.9x	12.6x
<b>Enterprise Value / EBIT</b>	21.4x	14.8x	23.1x
<b>Price / Earnings</b>	36.7x	23.1x	32.0x
<b>Price / Book Value</b>	1.6x	1.8x	2.3x
<b>Price / Tangible Book Value</b>	1.7x	1.9x	2.4x



## Balance Sheet & Debt Summary

### Debt Summary

Debt Structure	2015	2016
2019 6.11% Senior Notes	160,000	120,000
2.75% Credit Agreement Term Loan	100,000	95,000
4.50% Credit Agreement Revolving Credit Loan	0	30,000

### GVA Historical Balance Sheet

(In U.S. \$'000s, except per share data)

	2014	2015	2016	1Q 2017
Cash & Equivalents	255,961	252,836	189,326	169,501
Receivables	310,934	340,822	419,345	351,091
Costs and Estimated Earnings in Excess of Billings	36,411	59,070	73,102	90,112
Equity in Construction Joint Ventures	184,575	224,689	247,182	235,683
Other Current Assets	182,297	107,581	160,037	181,147
<b>Total Current Assets</b>	<b>970,178</b>	<b>984,998</b>	<b>1,088,992</b>	<b>1,027,534</b>
Property & Equipment	409,653	385,129	406,650	412,490
Goodwill	53,799	53,799	53,799	53,799
Investments in Affiliates	32,361	33,182	35,668	36,410
Other Long-Term Assets	154,503	169,770	148,344	147,986
<b>Total Assets</b>	<b>1,620,494</b>	<b>1,626,878</b>	<b>1,733,453</b>	<b>1,678,219</b>
Current Borrowings	1,247	14,800	14,796	14,796
Accounts Payable	151,935	157,571	199,029	170,006
Billings in Excess of Costs and Estimated Earnings	108,992	92,515	97,522	91,527
Other Current Liabilities	200,652	200,935	218,587	224,850
<b>Total Current Liabilities</b>	<b>462,826</b>	<b>465,821</b>	<b>529,934</b>	<b>501,179</b>
Long Term Borrowing	275,621	244,323	229,498	228,306
Other Liabilities	64,941	46,613	51,430	52,675
<b>Total Liabilities</b>	<b>803,388</b>	<b>756,757</b>	<b>810,862</b>	<b>782,160</b>
<i>Total Shareholders' Equity:</i>	817,106	870,121	922,591	896,059
<b>Total Liabilities &amp; Shareholders' Equity</b>	<b>1,620,494</b>	<b>1,626,878</b>	<b>1,733,453</b>	<b>1,678,219</b>
Working Capital Ratio	2.10	2.11	2.05	2.05
Total Debt	276,868	259,123	244,294	243,102
Net Debt	20,907	6,287	54,968	73,601
Backlog	2,718,873	3,088,652	3,484,404	
Cash Flow From Operations	43,142	66,978	73,146	96,916

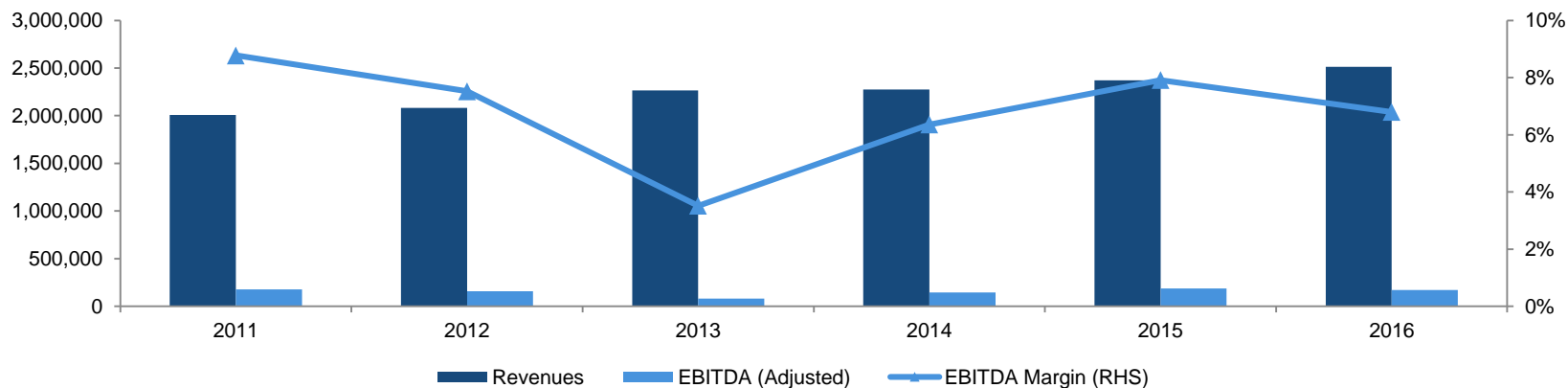


# Income Statement

## GVA Historical Income Statement

(In U.S. \$'000s, except per share data)

	2012	2013	2014	2015	2016	Quarterly Results	
						1Q 2016	1Q 2017
Total Revenue	2,083,037	2,266,901	2,275,270	2,371,029	2,514,617	439,452	468,400
Gross Profit	234,759	185,263	239,741	299,836	301,370	39,245	25,126
Gross Profit Margin (%)	11.3%	8.2%	10.5%	12.6%	12.0%	8.9%	5.4%
Operating Income (Loss)	80,835	(54,692)	65,100	110,308	92,354	(16,288)	(36,441)
Margin (%)	3.9%	-2.4%	2.9%	4.7%	3.7%	-3.7%	-7.8%
DD&A	56,101	72,899	68,252	64,309	64,375	13,736	14,649
Stock-Based Compensation	11,475	13,443	11,160	8,763	13,383	5,985	8,913
Non-Cash Restructuring & Impairment Losses (Gains)	145	44,734	(2,643)	(1,044)	(1,000)	-	-
<b>EBITDA (Adjusted)</b>	<b>148,556</b>	<b>76,384</b>	<b>141,869</b>	<b>182,336</b>	<b>169,112</b>	<b>178,262</b>	<b>152,800</b>
Margin (%)	7.1%	3.4%	6.2%	7.7%	6.7%	40.6%	32.6%



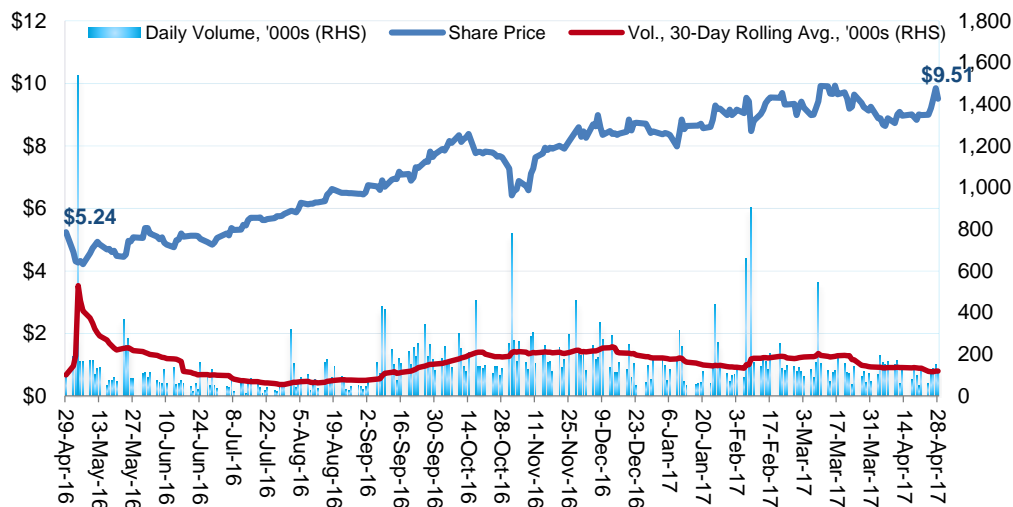
### Recent News

- **April 27, 2017:** GVA announced it has been awarded a \$33MM Construction Manager at Risk contract by the Nevada DoT for the construction of the State Route 28 Shared Use Path in Incline Village, NV. Scope of the work includes constructing 3 miles of shared use path along with building 6 short span bridges and excavating 30,000 cubic yards of roadway.
- **April 12, 2017:** GVA announced is has been awarded a \$59MM sub-contract by the Turner/PLC JV for the Midfield Satellite Concourse North Project at LAX in CA. Granites scope of work includes demolition of over 80,000 cubic yards of existing Portland Cement Concrete and asphalt surfaces and installation of over 28,000 feet of new domestic and fire water, storm drain, sanitary sewer and natural gas utilities.
- **April 11, 2017:** GVA has been awarded a \$22MM contract by the California DoT for the reconstruction of State Route 14 in Indian Wells, CA. GVA is responsible for the reconstruction of four miles of two-lane conventional highway to a four-lane expressway.

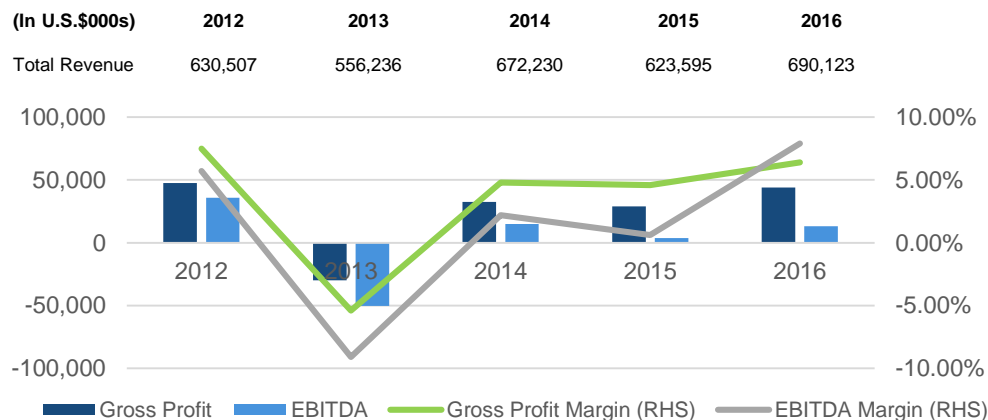
### Conference Call Notes:

- “Mother Nature hit CA and much of our businesses in the West like a buzzsaw throughout the first quarter. Notably, this inclement weather had the most negative impact on our Materials business, severely impacting production in CA and across the West. Weather also was a headwind for our solid performing Construction segment.”
- First quarter performance in GVA’s Large Project Construction segment continued to be challenged by impacts from design, weather, project execution and owner-related issues. GVA continues to adjust their approach in this business to better prioritize project bidding and teaming, focusing on significantly higher return expectations.

## Price/ Volume



## Income Overview



## Valuation ( \$ '000s, except per share data )

30-Day Avg. Share Price (as of 4/28/17)	9.06
52-Week High	9.93
52-Week Low	4.22
<b>Market Cap</b>	<b>226,958</b>
Total Debt	4,297
Total Cash	37,147
<b>Enterprise Value</b>	<b>195,135</b>
Book Value	106,838
Goodwill & Intangibles	54,820
<b>Tangible Book Value</b>	<b>52,018</b>

## Valuation Multiples

	2014	2015	2016	1Q2017
<b>Backlog (\$ Millions)</b>	764	761	823	925
<b>Backlog Months</b>	13.6x	14.6x	14.3x	15.5x
<b>Book-To-Bill</b>	1.1x	1.0x	1.1x	1.1x
<b>Enterprise Value / Revenue</b>	0.1x	0.2x	0.3x	0.3x
<b>Enterprise Value / EBITDA</b>	4.7x	29.8x	13.5x	10.9x
<b>Enterprise Value / EBIT</b>	N/A	N/A	N/A	N/A
<b>Price / Earnings</b>	N/A	N/A	N/A	N/A
<b>Price / Book Value</b>	0.4x	1.0x	2.0x	2.1x
<b>Price / Tangible Book Value</b>	0.6x	2.3x	4.0x	4.4x

## Balance Sheet & Debt Summary

Debt Summary	Rate:	2016	1Q 2017
Equipment Backed Term Loan:	12.0%	2,729	1,909
Equipment Backed Revolver:	12.0%	-	-
Equipment Finance Loans:	3.12% - 6.92%	2,665	2,388
<b>Total Debt Outstanding:</b>		<b>5,394</b>	<b>4,297</b>

### STRL Historical Balance Sheet

(In U.S. \$'000s, except per share data)

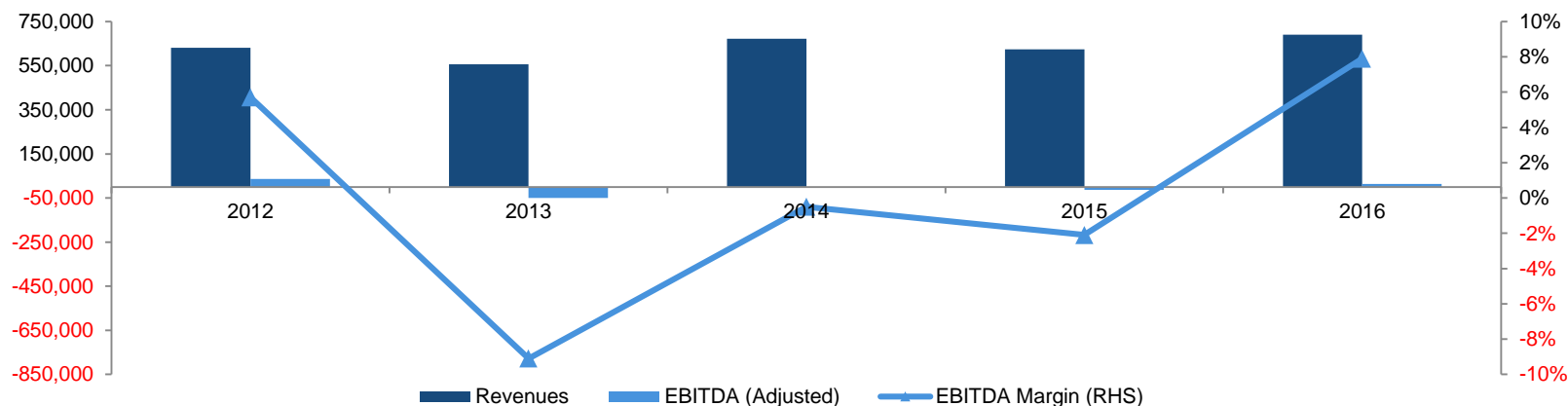
	2014	2015	2016	1Q 2017
<b>Assets:</b>				
Cash	22,843	4,426	42,785	37,147
Costs and Estimated Earnings in Excess of Billings	33,403	26,905	32,705	34,475
Accounts Receivables	78,896	82,112	84,132	91,089
Other Current Assets	21,832	21,478	16,286	18,256
<b>Total Current Assets</b>	<b>156,974</b>	<b>134,921</b>	<b>175,908</b>	<b>180,967</b>
Property & Equipment	87,098	73,475	68,127	65,821
Goodwill & Intangibles	54,820	54,820	54,820	54,820
Other Assets:	7,559	2,949	2,968	2,968
<b>Total Assets</b>	<b>306,451</b>	<b>266,165</b>	<b>301,823</b>	<b>304,576</b>
<b>Liabilities:</b>				
Current Borrowings	965	4,856	3,845	2,939
Billings in Excess of Costs and Estimated Earnings	25,649	30,556	56,914	62,656
Other Current Liabilities	66,792	58,959	67,097	71,448
<b>Total Current Liabilities</b>	<b>11,244</b>	<b>9,940</b>	<b>18,736</b>	<b>14,735</b>
Long Term Borrowing	37,021	16,107	1,549	1,358
Other Liabilities	23,632	49,993	45,592	44,602
<b>Total Liabilities</b>	<b>165,303</b>	<b>170,411</b>	<b>193,733</b>	<b>197,738</b>
<i>Total Shareholders' Equity:</i>	<i>141,148</i>	<i>95,754</i>	<i>108,090</i>	<i>106,838</i>
<b>Total Liabilities &amp; Shareholders' Equity</b>	<b>306,451</b>	<b>266,165</b>	<b>301,823</b>	<b>304,576</b>
Working Capital Ratio	1.50	1.29	1.20	1.19
Total Debt	37,986	20,963	5,394	4,297
Net Debt	15,143	16,537	(37,391)	(32,850)
Backlog	764,000	761,000	823,000	925,000
Cash Flow From Operations	(10,513)	8,969	44,499	40,947

## Income Statement

### STRL Historical Income Statement

(In U.S. \$'000s, except per share data)

	2012	2013	2014	2015	2016	Quarterly Results	
						1Q 2016	1Q 2017
Total Revenue	630,507	556,236	672,230	623,595	690,123	126,567	153,416
Gross Profit	47,472	(29,944)	32,421	28,953	43,854	3,548	9,287
Margin (%)	7.5%	-5.4%	4.8%	4.6%	6.4%	2.8%	6.1%
Operating Income (Loss)	15,991	(69,158)	(4,224)	(14,387)	(4,729)	(6,466)	(1,788)
Margin (%)	2.5%	-12.4%	-0.6%	-2.3%	-0.7%	-5.1%	-1.2%
Depreciation & Amortization	18,997	18,650	18,348	16,529	16,048	4,162	4,070
Revaluation of Noncontrolling Interests	-	-	-	18,774	-	-	-
Stock-Based Compensation	694	928	849	1,604	1,810	400	640
<b>EBITDA (Adjusted)</b>	<b>35,682</b>	<b>(49,580)</b>	<b>14,973</b>	<b>22,520</b>	<b>13,129</b>	<b>(1,904)</b>	<b>2,922</b>
Margin (%)	5.7%	-8.9%	2.2%	3.6%	7.9%	-1.5%	1.9%
<b>Net Income (Loss)</b>	<b>(297)</b>	<b>(73,929)</b>	<b>(9,781)</b>	<b>(20,402)</b>	<b>(9,238)</b>	<b>(7,336)</b>	<b>(1,886)</b>



### Recent News

- **Mar. 20, 2017:** Myers & Sons Construction (“Myers”), a STRL Subsidiary, is the apparent low bidder on the \$21.9MM McHenry Avenue Corridor Improvements projects in Stockton, CA. The project consists of the replacement of an existing two lane bridge and is scheduled to run from Apr. 2017 through mid-2020.
- **Mar. 9, 2017:** STRL has signed a definitive agreement to purchase Denton, TX- based Tealstone Construction for ~\$85MM. Tealstone is a market leader in commercial and residential concrete construction in the Dallas-Fort Worth Metroplex and serves commercial contractors and multi-family developers, as well as national homebuilders in TX and OK.
- **Feb. 6, 2017:** A JV consisting of STRL’s subsidiary, Ralph L. Wadsworth Construction, and W.W. Clyde & Co. have been awarded a \$139MM highway project by the Utah DoT. Design of the project is scheduled to start immediately and is scheduled to run through the end of 2018.

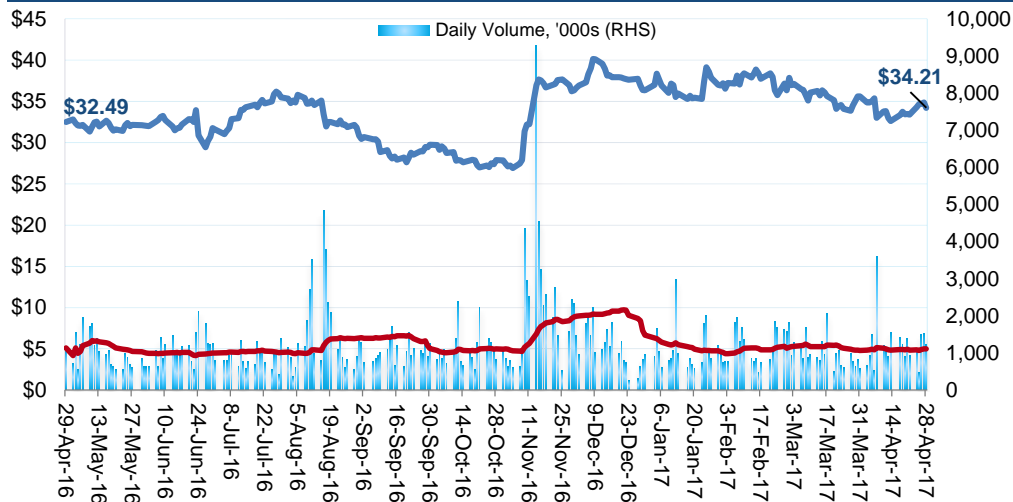
### Conference Call Notes

- “The first quarter was certainly a busy one for us and I’m very pleased with the progress we have made and the results we’re able to achieve. Versus the prior year, our revenues were up 21%, our Net Income was up 72%, our backlog grew 8% and our gross margin in backlog increased by an additional 70 basis points. We had zero loss time incidents and continued our focus efforts to improve our Texas operations.”
- Over the quarter, STRL closed on the transformational acquisition, refinanced the company and beat their internal plan.
- STRL’s core markets remain strong and their backlog is at an all-time high.



## Company Snapshot – AECOM

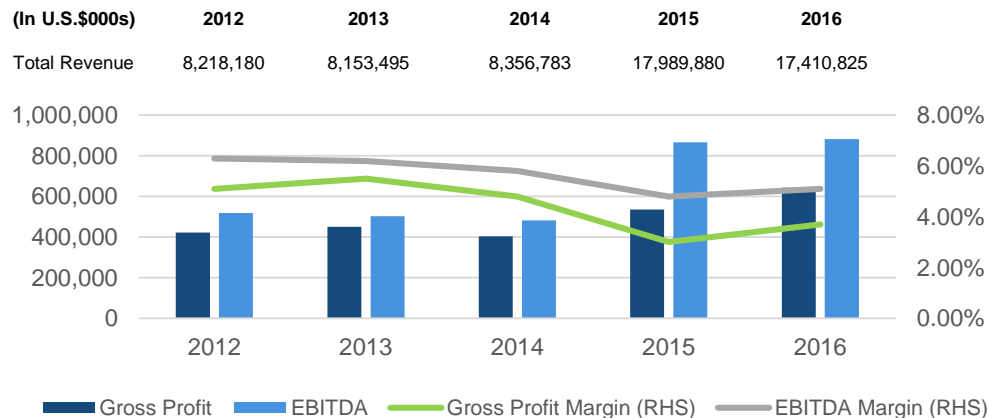
### Price/ Volume



### Valuation ( \$ '000s, except per share data )

30-Day Avg. Share Price (as of 4/28/17)	37.07
52-Week High	40.13
52-Week Low	26.92
<b>Market Cap</b>	<b>5,301,997</b>
Total Debt	4,203,720
Noncontrolling Interest	183,798
Total Cash	725,972
<b>Enterprise Value</b>	<b>8,963,543</b>
Book Value	3,728,190
Goodwill & Intangibles	6,232,038
<b>Tangible Book Value</b>	<b>(2,503,848)</b>

### Income Overview



### Valuation Multiples

	2014	2015	2016	1Q2017
<b>Backlog (\$ Millions)</b>	<b>25,100</b>	<b>43,800</b>	<b>42,800</b>	<b>42,400</b>
<b>Backlog Months</b>	<b>36.0x</b>	<b>29.2x</b>	<b>29.5x</b>	<b>29.0x</b>
<b>Book-To-Bill</b>	<b>2.0x</b>	<b>2.0x</b>	<b>0.9x</b>	<b>1.2x</b>
<b>Enterprise Value / Revenue</b>	0.4x	0.5x	0.5x	0.5x
<b>Enterprise Value / EBITDA</b>	7.4x	10.1x	10.8x	10.5x
<b>Enterprise Value / EBIT</b>	10.1x	68.0x	24.4x	19.3x
<b>Enterprise Value / CF</b>	9.9x	11.5x	11.3x	13.7x
<b>Price / Earnings</b>	13.1x	N/A	34.0x	19.0x
<b>Price / Book Value</b>	1.3x	1.3x	1.6x	1.4x
<b>Price / Tangible Book Value</b>	12.4x	N/A	N/A	N/A
<b>Price / CF</b>	8.4x	6.1x	6.8x	8.1x



## Balance Sheet & Debt Summary

Debt Summary	2016	1Q2017
<b>Total Debt By Type:</b>		
2014 Credit Agreement	1,954,900	1,095,300
2014 Senior Notes	1,600,000	1,600,000
2017 Senior Notes	-	1,000,000
URS Senior Notes	427,700	426,800
Other Debt	142,700	139,400
<b>Total Debt</b>	<b>4,125,300</b>	<b>4,261,500</b>
<b>Debt Maturity:</b>		
2017	289,500	
2018	122,600	
2019	112,900	
2020	107,500	
2021	767,700	
Thereafter	2,861,300	
<b>Total</b>	<b>4,261,500</b>	

### ACM Balance Sheet

(USD '000)

Fiscal Year Ending Sept. 30

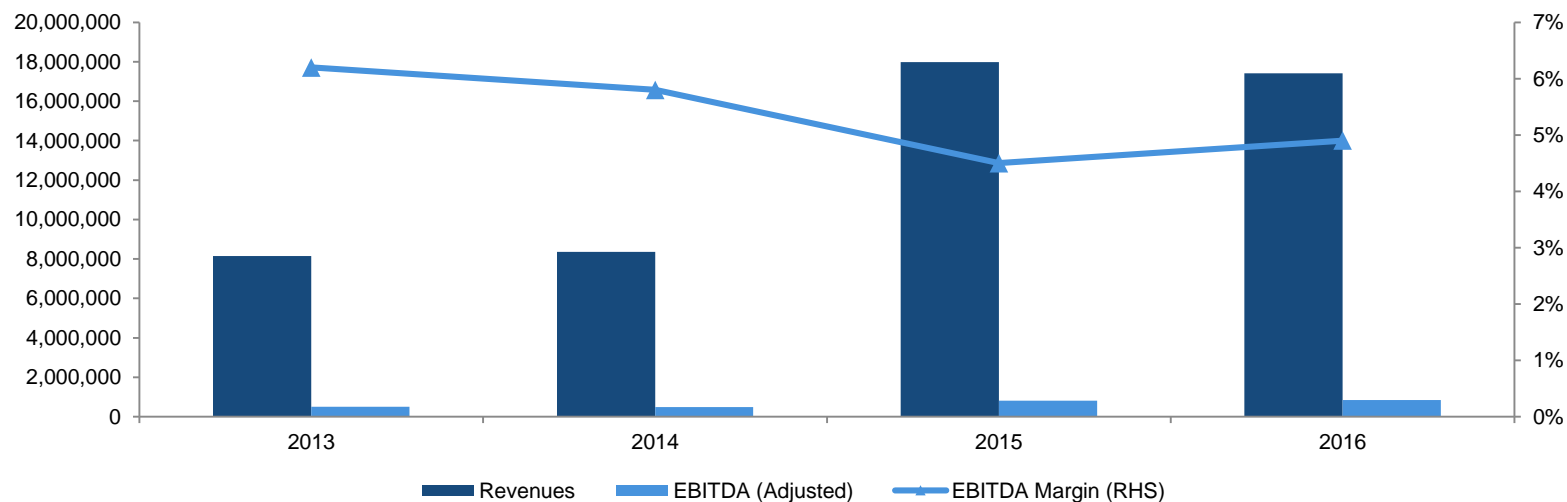
	2013	2014	2015	2016	1Q2017
<b>Total Current Assets</b>	<b>3,131,602</b>	<b>3,434,113</b>	<b>6,246,085</b>	<b>6,000,771</b>	<b>6,166,308</b>
Corporate Cash	450,328	521,784	543,016	588,644	619,909
Cash in Consolidated JVs	150,349	52,404	140,877	103,501	106,063
Cash & Equivalents	600,677	574,188	683,893	692,145	725,972
Accounts Receivable	2,342,262	2,654,976	4,841,450	4,531,460	4,708,941
Other Current Assets	188,663	204,949	720,742	777,166	731,395
<b>Total Assets</b>	<b>5,665,623</b>	<b>6,123,377</b>	<b>14,014,298</b>	<b>13,726,745</b>	<b>13,641,041</b>
Property & Equipment, Net	270,672	281,979	699,322	644,992	619,032
Investments in Unconsolidated JVs	106,422	142,901	321,625	330,485	354,571
Goodwill & Intangibles	1,894,903	2,027,576	6,480,130	6,303,282	6,232,038
Other Assets	262,024	236,808	267,136	447,215	269,092
<b>Total Current Liabilities</b>	<b>2,053,549</b>	<b>2,455,769</b>	<b>4,836,052</b>	<b>5,304,756</b>	<b>5,064,092</b>
Short-Term Debt	29,578	23,915	2,788	26,303	21,405
Current Portion of Long-Term Debt	54,687	40,498	157,623	340,021	331,233
Accounts Payable	725,389	1,047,155	1,853,993	1,910,915	1,937,110
Billings in Excess	322,486	379,574	653,877	631,928	644,762
Other Current Liabilities	921,409	964,627	2,167,771	2,395,589	2,129,582
<b>Total Liabilities</b>	<b>3,591,529</b>	<b>3,850,897</b>	<b>10,383,355</b>	<b>10,174,256</b>	<b>9,912,851</b>
Long-Term Debt	1,089,060	939,565	4,446,527	3,758,966	3,851,082
Other Liabilities	448,920	455,563	1,100,776	1,110,534	997,677
<b>Shareholders' Equity</b>	<b>2,074,094</b>	<b>2,272,480</b>	<b>3,630,943</b>	<b>3,552,489</b>	<b>3,728,190</b>
Working Capital Ratio	1.5x	1.4x	1.3x	1.1x	1.2x
Total Debt	1,173,325	1,003,978	4,606,938	4,125,290	4,203,720
Net Debt	572,648	429,790	3,923,045	3,433,145	3,477,748
Backlog	16,600,000	25,100,000	43,800,000	42,800,000	42,400,000
Cash Flow From Operations	408,598	360,625	764,433	814,155	654,369





## Income Statement

ACM Historical Income Statement	Fiscal Year Ending Sept. 30					1H Results	
	2012	2013	2014	2015	2016	1H 2016	1H 2017
Operating Income	53,606	376,989	352,882	129,018	375,537	196,149	284,306
EBIT Margin (%)	0.7%	4.6%	4.2%	0.7%	2.2%	2.3%	3.2%
D&A	102,974	94,406	95,394	599,265	398,730	218,199	138,866
Non-Cash Stock	26,551	32,611	34,438	85,852	73,406	42,033	38,053
Prepayment Penalty on Unsecured Notes	-	-	-	55,639	-	-	-
Excess Tax Benefit	(1,254)	(1,754)	(748)	(3,642)	-	(3,335)	-
Goodwill Impairment	336,000	-	-	-	-	-	-
<b>EBITDA</b>	<b>517,877</b>	<b>502,252</b>	<b>481,966</b>	<b>866,132</b>	<b>882,444</b>	<b>453,046</b>	<b>461,225</b>
EBITDA Margin (%)	6.3%	6.2%	5.8%	4.8%	5.1%	5.2%	5.2%
<b>Net Income</b>	<b>433,352</b>	<b>408,598</b>	<b>360,625</b>	<b>764,433</b>	<b>814,155</b>	<b>66,191</b>	<b>181,618</b>



### RECENT NEWS:

- **May 9, 2017:** Aecom announced it has been awarded a \$177.5MM cost-plus, fixed-fee maintenance service contract to support the U.S. Navy's Naval Air Warfare Center Aircraft Division in Lakehurst, New Jersey. Aecom will provide maintenance services, including integrated support equipment maintenance repair and overhaul services to reduce repair cycle time and optimize availability of ready for use support equipment.
- **Apr. 3, 2017:** Aecom announced that AECOM Capital has entered into a definitive agreement to sell its equity interest in its first investment. Aecom's CEO said of the investment, "In tandem with our partners, we successfully developed high-value real estate... [This] effort further validates our design, build, finance and operate division and reinforces Aecom's reputation as a development partner of choice."

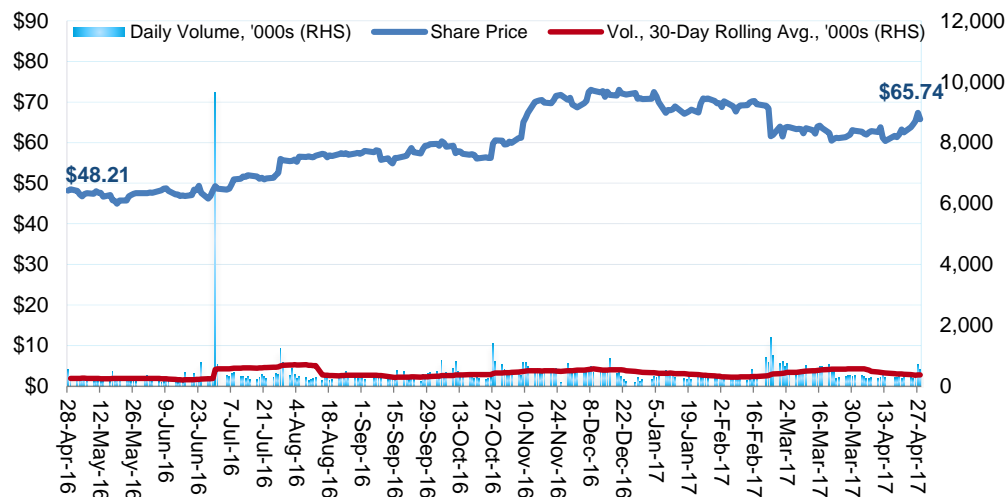
### CONFERENCE CALL NOTES:

- "We begin the year with a great deal of momentum across our diverse businesses and our conference continues to grow. In early April, CA's legislature approved the \$52B Road Repair and Accountability Act. In Addition, a number of key political priorities continued to advance, including a \$1 T domestic infrastructure bill and sustained increases in defense spending. Importantly, nearly 70% of our profits are generated from infrastructure and defense markets that are poised to benefit as these initiatives gain traction."
- "It is becoming clear that our design, build, finance and operate capabilities, our scale and key investments in growth are resulting in meaningful advantages."
- ACM generated positive organic revenue growth for a second straight quarter and its underlying operating performance exceeded their expectations, delivering solid margins across all three segments.



## Company Snapshot – Emcor

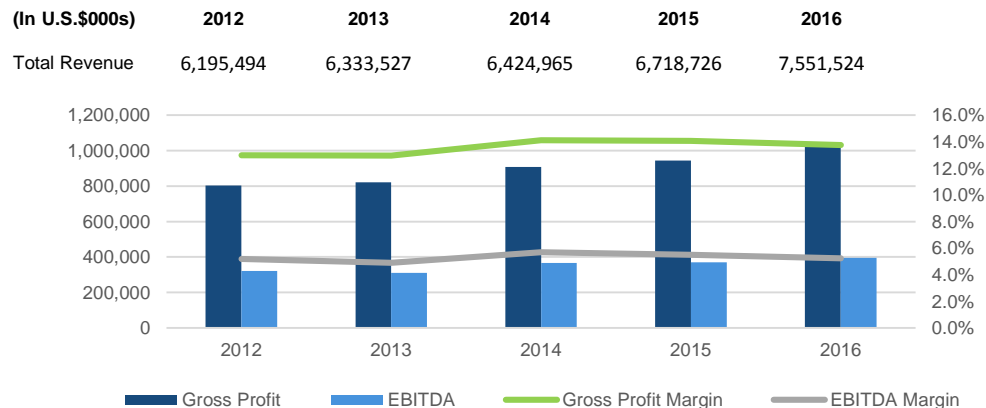
### Price/ Volume



### Valuation ( \$ '000s, except per share data )

30-Day Avg. Share Price (as of 4/28/17)	62.62
52-Week High	73.04
52-Week Low	44.97
<b>Market Cap</b>	<b>3,709,173</b>
Total Debt	420,694
Total Cash	302,754
Noncontrolling Interest	823
<b>Enterprise Value</b>	<b>3,827,936</b>
Book Value	1,534,141
Goodwill & Intangibles	1,531,816
<b>Tangible Book Value</b>	<b>2,325</b>

### Income Overview



### Valuation Multiples

	2014	2015	2016	1Q2017
<b>Backlog (\$ Millions)</b>	3,633	3,771	3,903	3,974
<b>Backlog Months</b>	6.8x	6.7x	6.2x	6.2x
<b>Book-To-Bill</b>	1.0x	1.0x	1.0x	1.0x
<b>Enterprise Value / Revenue</b>	0.4x	0.4x	0.5x	0.5x
<b>Enterprise Value / EBITDA</b>	7.4x	7.2x	10.0x	9.0x
<b>Enterprise Value / EBIT</b>	9.3x	9.3x	12.8x	11.4x
<b>Price / Earnings</b>	16.1x	16.4x	21.9x	18.5x
<b>Price / Book Value</b>	2.0x	1.9x	2.6x	2.4x
<b>Price / Tangible Book Value</b>	30.0x	17.2x	56.2x	1595.3x



## Balance Sheet & Debt Summary

### Debt Summary

#### 2016 Revolving Credit Facility:

Maturity:	Aug. 3, 2021
Total Amount:	\$900,000
Outstanding:	\$125,000
Rate:	2.01%
Availability:	\$775,000

#### 2016 Term Loan:

Maturity:	Aug. 3, 2021
Total Amount:	\$300,000
Outstanding:	\$325,000
Rate:	2.01%
Availability:	-

### EME Historical Balance Sheet

(In U.S. \$'000s, except per share data)

	2014	2015	2016	1Q2017
<b>Assets:</b>				
Cash	432,056	486,831	464,617	302,754
Accounts Receivable	1,234,187	1,359,862	1,495,431	1,508,471
Costs in Excess	103,201	117,734	130,697	144,902
Other Current Asset	117,159	101,685	120,102	85,665
<b>Total Current Assets</b>	<b>1,886,603</b>	<b>2,066,112</b>	<b>2,210,847</b>	<b>2,041,792</b>
Property & Equipment	122,178	122,018	127,951	131,455
Goodwill & Intangibles	1,336,162	1,316,004	1,467,026	1,531,816
Other Assets:	44,024	38,523	88,346	100,099
<b>Total Assets</b>	<b>3,388,967</b>	<b>3,542,657</b>	<b>3,894,170</b>	<b>3,805,162</b>
<b>Liabilities:</b>				
Current Maturities of Long Term Debt	19,041	17,541	15,030	15,289
Accounts Payable	460,478	488,251	501,213	466,962
Billings in Excess	368,555	429,235	489,242	492,389
Other Current Liabilities	435,343	477,394	506,289	498,220
<b>Total Current Liabilities</b>	<b>1,283,417</b>	<b>1,412,421</b>	<b>1,511,774</b>	<b>1,472,860</b>
Borrowings Under Revolver	-	-	125,000	125,000
Long-Term Debt	316,399	297,559	283,296	280,405
Other Noncurrent Liabilities	359,764	352,621	436,158	392,756
<b>Total Liabilities</b>	<b>1,959,580</b>	<b>2,062,601</b>	<b>2,356,228</b>	<b>2,271,021</b>
<i>Total Shareholders' Equity:</i>	<i>1,429,387</i>	<i>1,480,056</i>	<i>1,537,942</i>	<i>1,534,141</i>
<b>Total Liabilities &amp; Shareholders' Equity</b>	<b>3,388,967</b>	<b>3,542,657</b>	<b>3,894,170</b>	<b>3,805,162</b>
Working Capital Ratio	1.5x	1.5x	1.5x	1.4x
Total Debt	335,440	315,100	423,326	420,694
Net Debt	(96,616)	(171,731)	(41,291)	117,940
Backlog	3,633,588	3,771,163	3,902,922	3,973,858
Cash Flow From Operations	246,657	266,666	264,561	296,552

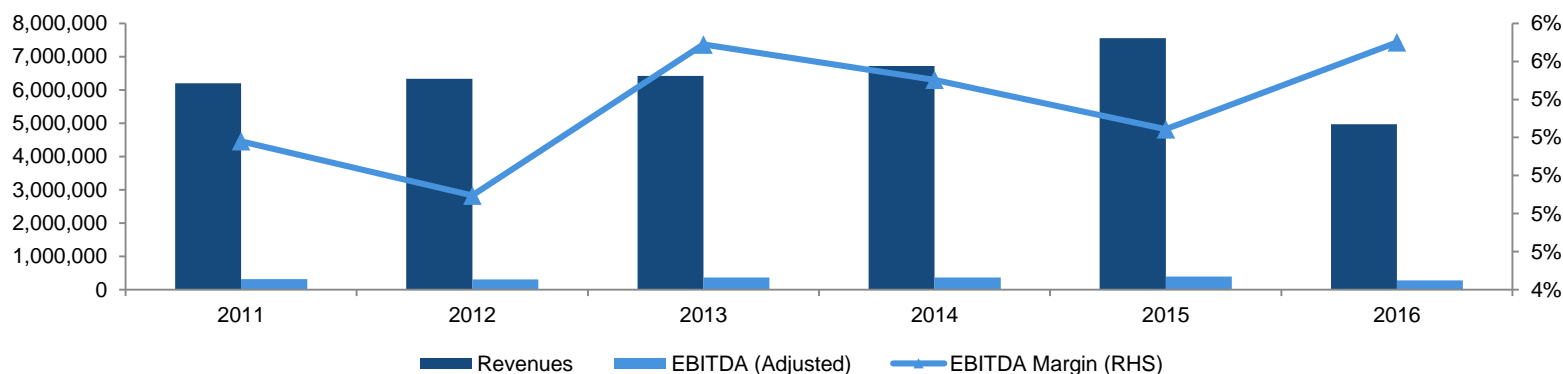


# Income Statement

## EME Historical Income Statement

(In U.S. \$'000s, except per share data)

	2012	2013	2014	2015	2016	Quarterly Results	
						1Q 2016	1Q 2017
Total Revenue	6,195,494	6,333,527	6,424,965	6,718,726	7,551,524	1,744,970	1,891,732
Gross Profit	803,979	821,646	907,246	944,479	1,037,862	223,108	266,340
Margin (%)	13.0%	13.0%	14.1%	14.1%	13.7%	12.8%	14.1%
Operating Income (Loss)	260,303	240,350	289,878	287,082	308,458	55,615	82,774
Margin (%)	4.2%	3.8%	4.5%	4.3%	4.1%	3.2%	4.4%
Depreciation & Amortization	31,204	36,310	36,524	36,294	38,881	9,332	10,190
Amortization of Identifiable Intangibles	29,762	31,028	37,966	37,895	40,908	9,470	12,181
Share Based Comp	6,766	6,943	8,121	8,801	8,902	-	-
Excess Tax Benefit from Share Based Comp	(7,083)	(4,624)	(8,264)	(1,663)	(2,546)	(1,217)	(864)
Non-Cash Debt Issuance Costs	-	-	1,307	1,307	1,354	-	-
<b>EBITDA</b>	<b>320,952</b>	<b>310,007</b>	<b>365,532</b>	<b>369,716</b>	<b>395,957</b>	<b>370,318</b>	<b>104,281</b>
EBITDA Margin (%)	5.2%	4.9%	5.7%	5.5%	5.2%	5.4%	5.5%
<b>Net Income (Loss)</b>			<b>173,427</b>	<b>172,507</b>	<b>182,153</b>	<b>34,354</b>	<b>52,610</b>
Margin (%)	0.0%	0.0%	2.7%	2.6%	2.4%	2.0%	2.8%





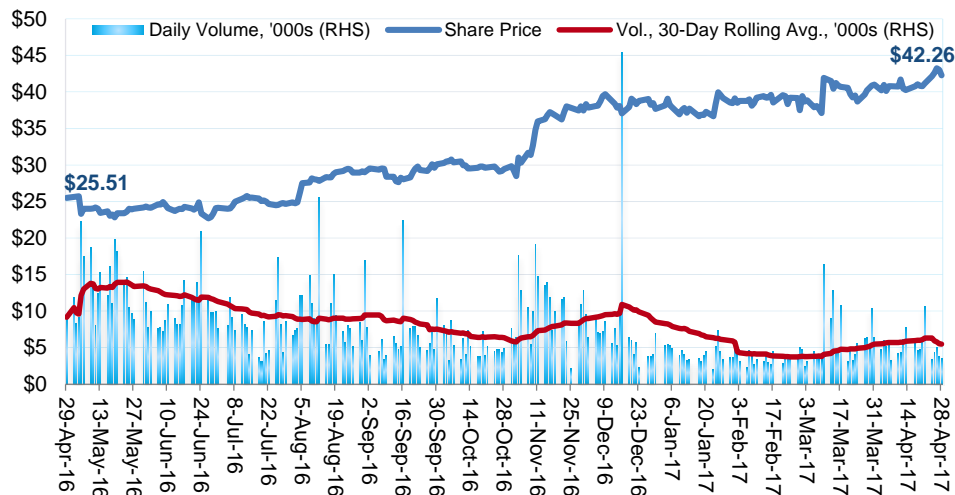
## Recent News

- **June 1, 2017** – EMCOR Group, Inc. (NYSE: EME) today announced the election of Carol P. Lowe to the Company's Board of Directors at its 2017 Annual Meeting of Stockholders at which the Company's incumbent directors standing for re-election were also elected.
- **April 11, 2017** – Johnny Mac Soldiers Fund is pleased to announce that its recent 3rd Greater Houston Gala raised \$850,000 in support of its mission of giving back through education to military veterans and their family members. The Johnny Mac Soldiers Fund, founded by fellow graduates and classmates of West Point, is inspired by Colonel John "Johnny Mac" McHugh, killed in action in Afghanistan May 18, 2010. An Army aviator, Colonel McHugh served 24 years in the U.S. Army, and is remembered as a selfless soldier, leader, family man, and friend. Over 375 people attended the event on April 6, 2017 at The Houstonian Hotel, Houston, Texas.
- **April 5, 2017** – EMCOR Group, Inc. (NYSE: EME) today announced that its Board of Directors has declared a regular quarterly cash dividend of \$0.08 per common share. The dividend will be paid on April 28, 2017 to stockholders of record as of April 17, 2017.



## Company Snapshot – MYR Group, Inc.

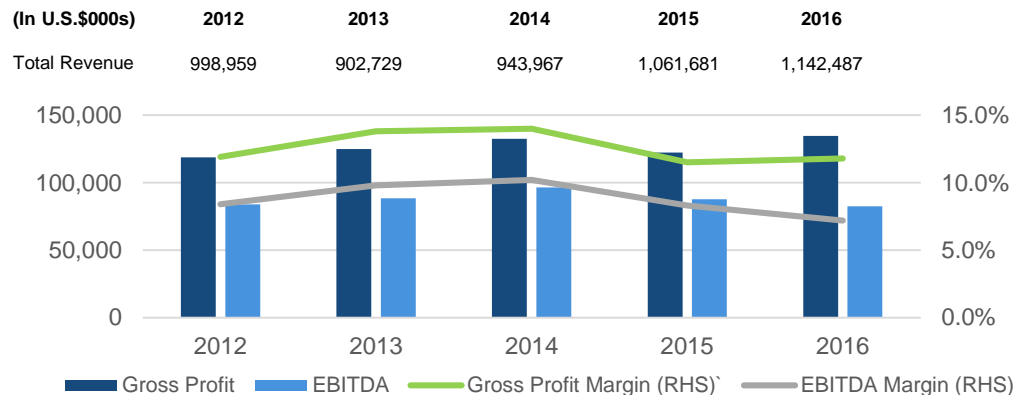
### Price/ Volume



### Valuation ( \$ '000s, except per share data )

30-Day Avg. Share Price (as of 4/28/17)	39.71
52-Week High	43.24
52-Week Low	22.71
<b>Market Cap</b>	<b>654,145</b>
Total Debt	44,229
Total Cash	6,939
<b>Enterprise Value</b>	<b>691,435</b>
Book Value	263,894
Goodwill & Intangibles	58,166
<b>Tangible Book Value</b>	<b>205,728</b>

### Income Overview



### Valuation Multiples

	2014	2015	2016	1Q2017
<b>Backlog (\$ Millions)</b>	433	450	688	660
<b>Backlog Months</b>	5.5x	5.1x	7.2x	6.7x
<b>Book-To-Bill</b>	1.1x	1.0x	1.2x	1.2x
<b>Enterprise Value / Revenue</b>	0.5x	0.4x	0.6x	0.6x
<b>Enterprise Value / EBITDA</b>	5.0x	4.6x	8.2x	8.7x
<b>Enterprise Value / EBIT</b>	8.3x	9.0x	17.6x	19.2x
<b>Price / Earnings</b>	15.4x	16.3x	29.9x	31.7x
<b>Price / Book Value</b>	1.7x	1.3x	2.4x	2.5x
<b>Price / Tangible Book Value</b>	2.1x	1.6x	3.1x	3.2x



## Balance Sheet & Debt Summary

2016 Credit Facility    30-Jun-21    \$250 MM

<b>Contractual Obligations</b>	<b>2015</b>	<b>2016</b>
Short & Long-Term Debt	0	59,070
Operating Lease Obligations	4,567	9,205
Capital Lease Obligations	0	5,260
Equipment Purchase Obligations	2,164	8,558
Income Tax Contingencies	564	301
<b>Total</b>	<b>7,295</b>	<b>82,394</b>

### MYRG Historical Balance Sheet

(In U.S. \$'000s, except per share data)

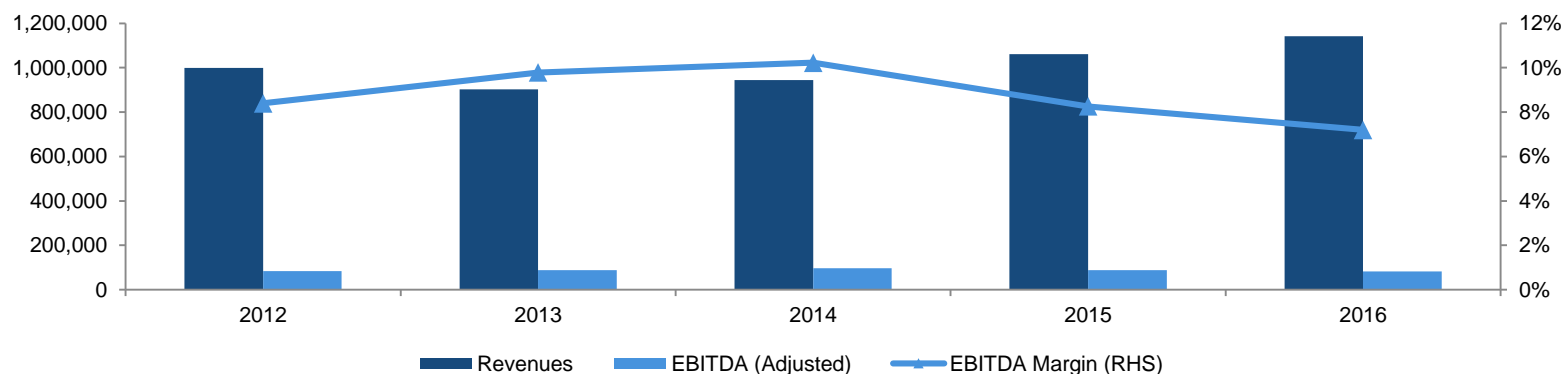
	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>1Q 2017</b>
Cash & Equivalents	77,636	39,797	23,846	6,939
Accounts Receivable	158,101	187,235	234,642	222,549
Costs in Excess	44,609	51,486	69,950	72,903
Other Current Assets	33,155	24,849	29,153	28,317
<b>Total Current Assets</b>	<b>313,501</b>	<b>303,367</b>	<b>357,591</b>	<b>330,708</b>
Property & Equipment	148,654	160,678	154,891	156,458
Goodwill & Intangibles	56,464	58,487	58,347	58,166
Other Noncurrent Assets	1,467	2,393	2,666	3,376
<b>Total Assets</b>	<b>520,086</b>	<b>524,925</b>	<b>573,495</b>	<b>548,708</b>
Current Portion of Capital Lease Obligations	-	-	1,085	1,093
Accounts Payable	62,247	73,300	99,942	91,048
Billings in Excess	38,121	40,614	42,321	49,448
Other Current Liabilities	71,220	65,823	84,966	81,141
<b>Total Current Liabilities</b>	<b>171,588</b>	<b>179,737</b>	<b>228,314</b>	<b>222,730</b>
Long-Term Debt	-	-	59,070	39,580
Long-Term Capital Lease Obligations, Net	-	-	3,833	3,556
Other Noncurrent Liabilities	25,945	15,308	19,104	18,948
<b>Total Liabilities</b>	<b>197,533</b>	<b>195,045</b>	<b>310,321</b>	<b>284,814</b>
<i>Shareholders' Equity</i>	322,553	329,880	263,174	263,894
<b>Total Liabilities &amp; Shareholders' Equity</b>	<b>520,086</b>	<b>524,925</b>	<b>573,495</b>	<b>548,708</b>
Working Capital Ratio	1.8x	1.7x	1.6x	1.5x
Total Debt	-	-	63,988	44,229
Net Debt	(77,636)	(39,797)	40,142	37,290
Backlog	433,641	450,934	688,832	660,869
Cash Flow From Operations	54,976	43,000	54,490	53,124





# Income Statement

MYRG Historical Income Statement	Quarterly Results						
	2012	2013	2014	2015	2016	1Q 2016	1Q 2017
Revenues	998,959	902,729	943,967	1,061,681	1,142,487	253,634	300,129
Gross Profit	118,653	124,877	132,414	122,341	134,723	27,281	25,740
<i>Gross Profit Margin (%)</i>	11.9%	13.8%	14.0%	11.5%	11.8%	10.8%	8.6%
Operating Income	55,762	55,617	58,404	44,841	38,754	3,307	480
<i>Operating Income Margin (%)</i>	5.6%	6.2%	6.2%	4.2%	3.4%	1.3%	0.2%
Depreciation & Amortization	25,156	29,195	33,423	38,029	39,122	9,916	9,746
Stock-Based Compensation	2,923	3,519	4,671	4,837	4,674	730	867
<b>EBITDA</b>	<b>83,841</b>	<b>88,331</b>	<b>96,498</b>	<b>87,707</b>	<b>82,550</b>	<b>13,953</b>	<b>11,093</b>
<i>EBITDA Margin (%)</i>	8.4%	9.8%	10.2%	8.3%	7.2%	5.5%	3.7%



# Services Overview

## Why We Are Different

### Focused Strictly on Infrastructure

- Management has years of experience in the Infrastructure Industry
- Solely focused on advising public and private clients in the Infrastructure/Construction sector

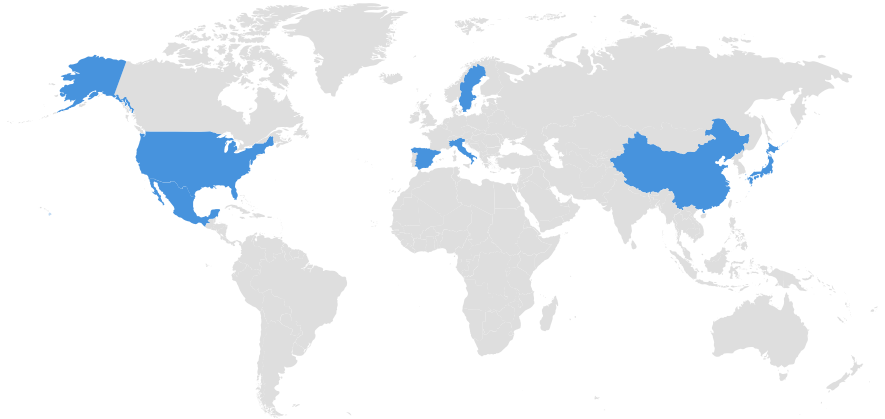
### Broad Range of Advisory Services

- M&A, Project Financing, Strategic Consulting, Restructuring, Executive Placement, and Financial Analysis
- All Industry Sub-Sectors

### Experience in All Major Infrastructure Markets

- Star America has worked in all infrastructure markets, including Civil Construction, Vertical Building, Public-Private Partnerships, Industrial

## Connecting Global Players to the Local Market



## Service Offerings

### Mergers & Acquisitions

We have a strong track record in both domestic and cross-border M&A advisory roles. We operate both negotiated processes and auctions, assist in deal structuring, and provide impartial advice about the merits of transactions in our industry of focus.

### Business Development

Star is well qualified to assist clients in developing their business plans in the U.S. Given the depth of experience of its partners and operating professionals, the company offers access to thought leadership of C-Level executives.

### PPP Financial Advisory

Star provides financial advisory services to companies and consortia seeking to participate in alternative procurement processes. We advise on debt capital raising in the bank and bond markets, and help structure competitive bids for our clients.

### Strategic & Financial Analysis

Industry analytics form the core of a successful financing or business development strategy. With our significant industry knowledge, we assess companies' current and projected financial and competitive positions to provide actionable recommendations. We have the capacity to provide comprehensive financial analysis allowing contractors to properly vet lower tiers and improve overall capital strength.

### Management Consulting

We work with clients to formulate and pursue strategic and tactical goals. Star provides true business solutions, including identifying potential management hires, developing and implementing marketing plans, and increasing operational efficiencies.

### Capital Raising

We maintain contacts at banks, hedge funds, equipment finance companies, and other financial firms. These are sources of capital for clients desiring funds for expansionary capital expenditures or general operating cash flow needs.

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