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Schaeffler India Limited

Investor Presentation

November 3, 2025

We pioneer motion

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Q3 2025 Awards and Accolades

Best Quality Export Parts Award by Escorts Kubota Limited

TAFE

Recognition for Zero Defect Supplies for the second consecutive year

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1 **Economy and Industry**

2 Business Highlights - Q3 and 9M 2025

3 Financial Highlights - Q3 and 9M 2025

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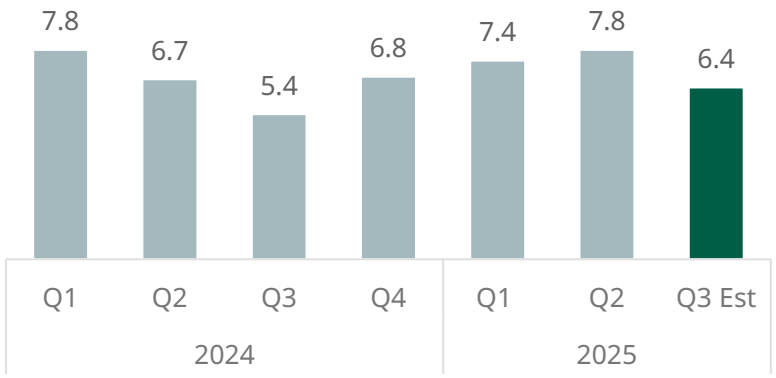
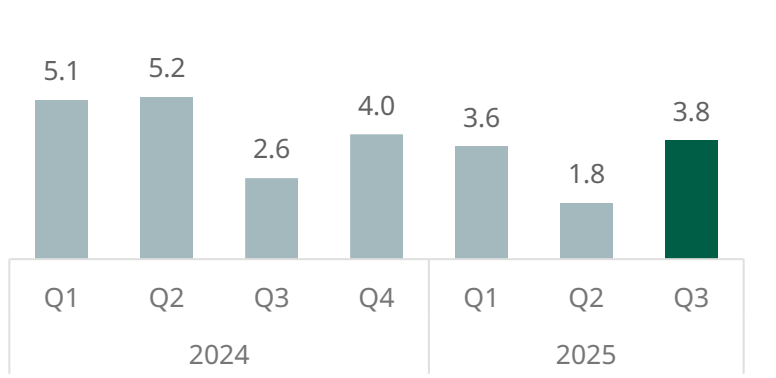
Economy

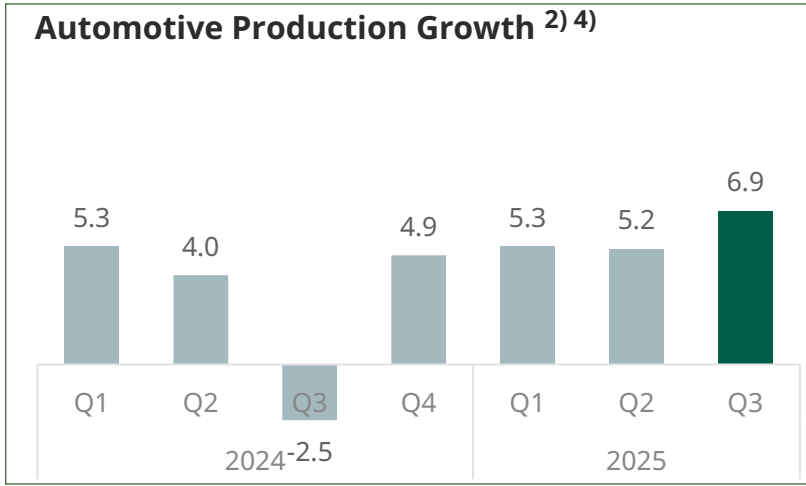
GDP [1) 3)]



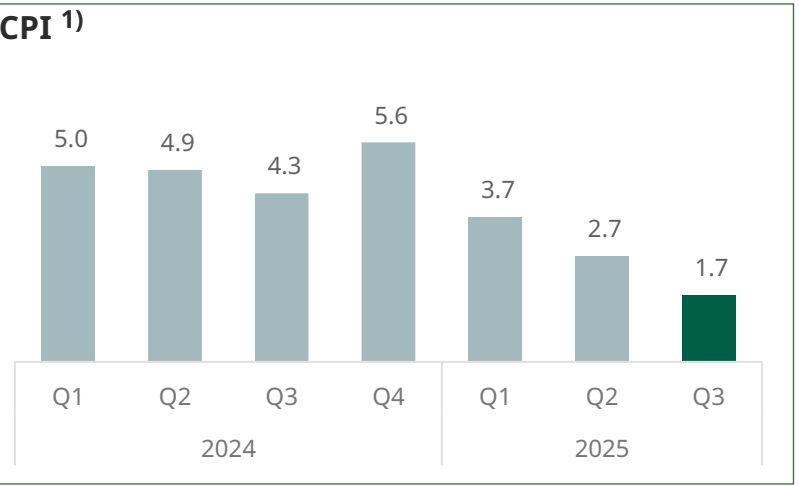
IIP [1) 3)]



Automotive Production Growth [2) 4)]



CPI [1)]



Key Aspects

- GDP – Grew at the fastest pace, driven by robust investment and resilient consumption
- IIP - Growth remained steady, supported by strong output in primary, intermediate, and construction goods.
- Automotive – Q3 YoY growth for CVs at 11.8% for PVs at 4.4% and for Tractors at 14.6%.
- CPI – CPI inflation edged up in August, led by housing and services, while food prices remained in deflation.

Note :
- Data is reinstated every quarter as per final reports released by authorities
- GDP, IIP, and Automotive Production are YoY growth rates, whereas CPI is quarterly inflation rate.
- Contribution of mining, manufacturing & electricity in IIP stands for August at 6%, 3.8% & 4.1% respectively
- Automotive Production includes PVs, CVs, & Tractors with production share of 72%, 15% & 12% respectively

Source of data :
[1)] Ministry of Statistics & Programme Implementation
[2)] SIAM : Society of Indian Automobile Manufacturers
[3)] GDP - Gross Domestic Production, IIP - Index of Industrial Production, CPI - Consumer Price Index
[4)] Automotive Production includes PVs, CVs, & Tractors

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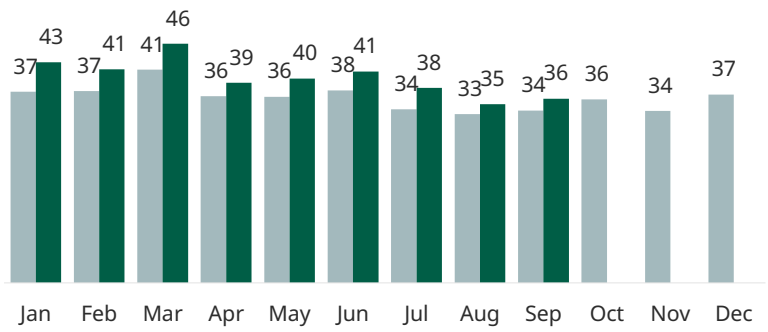
Core Sector Performance

2024 2025 YTD CY2025 Growth

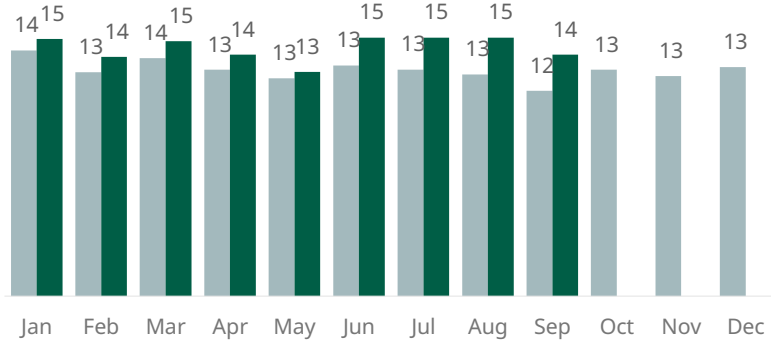
Cement Production (mn tn)

9.6%



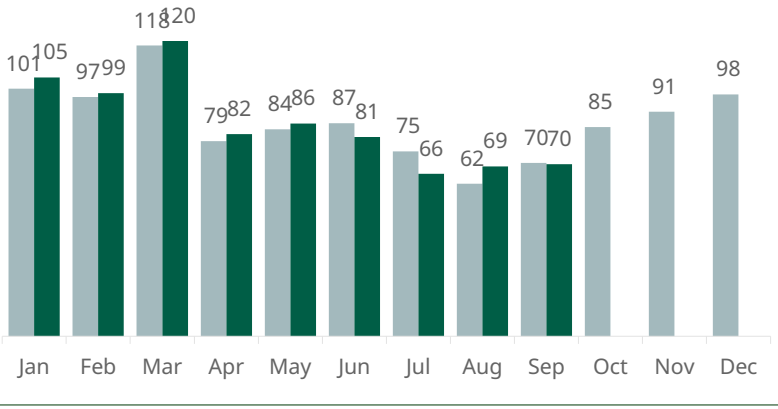
Steel Production (mn tn)

9.7%



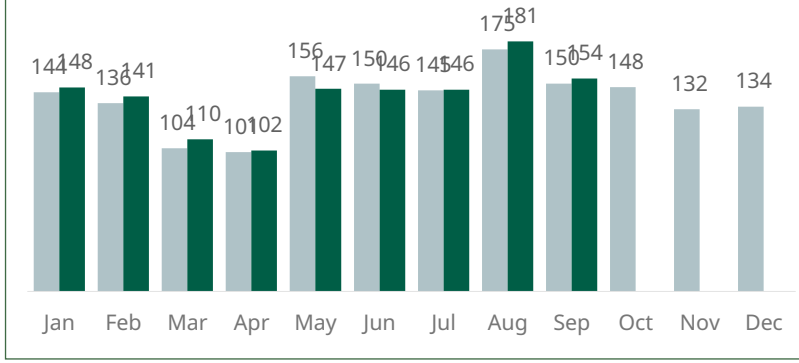
Coal Production (mn tn)

0.7%



Electricity Generation (bn KwH)

1.0%



Source of core sectors data: Office of Economic Advisor

Key Aspects

Core industry growth for YTD'25 registered at 2.9% compared to 4.8% for the same period last year.

Sector weightage within eight core sectors

Sector	% weight
Cement	5.4%
Steel	17.9%
Coal	10.3%
Electricity	19.8%

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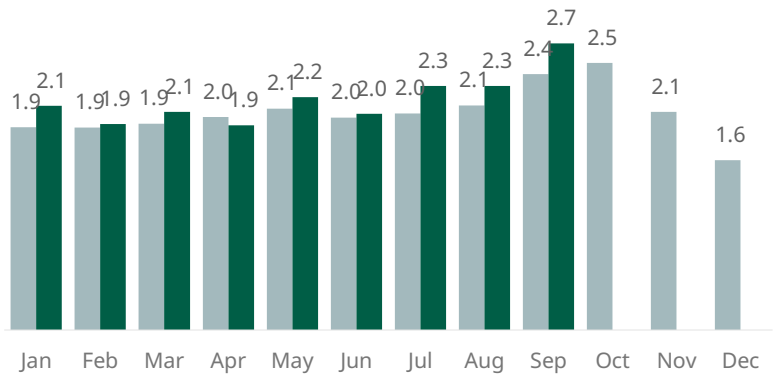
Automotive Sector Performance

2024 2025 YTD CY2025 Growth

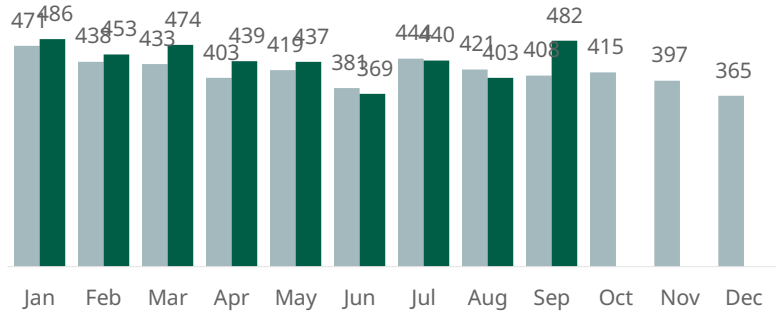
Two and three wheelers (mn units)[1)]

6.2%



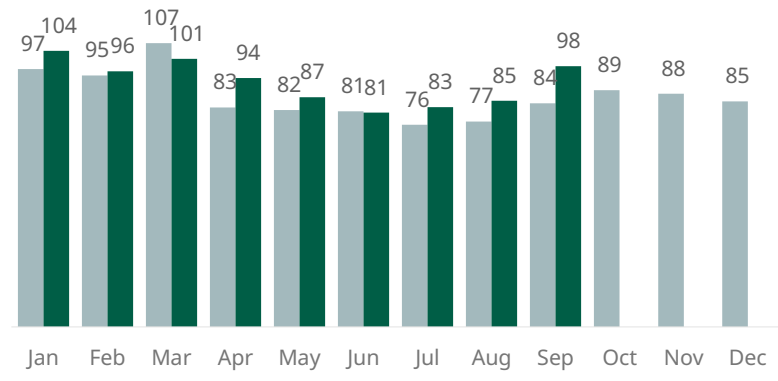
Passenger Vehicles (th units)[2)]

4.3%



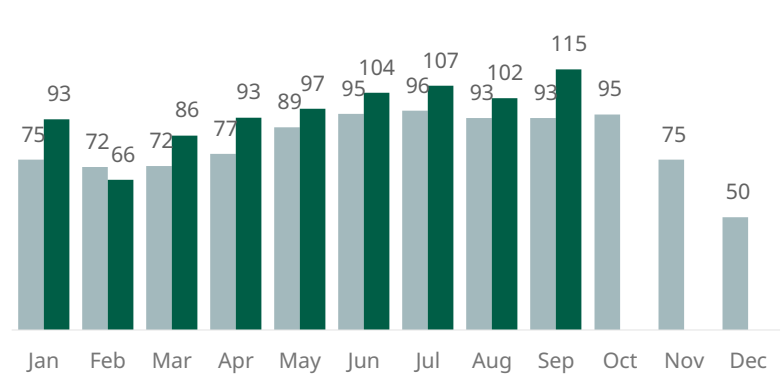
Commercial Vehicles (th units)[2)]

5.9%



Agricultural Tractors (th units)[3)]

13.1%



Key Aspects

- Two and three wheelers – Growth driven by festive demand and GST rate reductions on vehicles.
- PVs - SUV demand and discounts remained key drivers.
- CVs - Resilient freight demand fueled growth.
- Tractors - Growth driven by strong kharif sowing, favorable rainfall, MSP increases and easing rural income pressures.

Source of data :
[1)] SIAM : Society of Indian Automobile Manufacturers
[2)] TMA : Tractor Manufacturers Association
[3)] TW – Two wheelers, CV – Commercial Vehicles, PV – Passenger Vehicles,

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Q3 2025 Performance

Key messages

1. Double digit YoY growth momentum continues, aided by Automotive Technologies and intercompany exports
2. Better operating margins due to volume and fixed cost absorption
3. Free cash flow generation and capex realization – as planned
4. Focus on prudent financial management and long-term value creation as we move ahead

Revenue	EBITDA
13.9% vs Q3'24 3.4% vs Q2'25 **23,601 mn INR**	20.2% Q3'25 19.7% Q2'25 **4,760 mn INR**
PAT	**FCF**
13.0% Q3'25 13.0% Q2'25 **3,067 mn INR**	1,002 mn INR Q3'24 2,868 mn INR Q2'25 **2,232 mn INR**

EBITDA : Earning Before Interest, Tax and Depreciation (before exceptional item), FCF : Free Cashflow
Note : Q3 2025 performance comments on Standalone Financials

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Business Developments

Automotive Technologies

Durability & Sustainable Performance

- Business wins in hydraulic tensioners in PV segment
- New business wins in HD Clutches in CV segment
- Continued momentum in Dampers and LV Clutches across PVs and CVs

Vehicle Lifetime Solutions

Increased market coverage

- Volume wins continued for new launches – wipers and center joint support continue
- Launch of the automotive lube vending machine at Maneja facility
- Continued focus on portfolio expansion and penetration through range extension

Bearings and Industrial Solutions

Precision Engineering

- New business wins for slewing ring in the off-road segment.
- Business nomination for roller and ball screws and condition monitoring systems in industrial lifetime solutions.
- Business wins for CRBs, TRBs ACBBs in raw material sector.

[1] TW - Two-wheelers, CV - Commercial Vehicles, PV - Passenger Vehicles

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Portfolio Expansion – Bearings and Industrial Solutions

Launch: Large-size SRBs, Cast Steel Housings & accessories

Manufacturing Facility : Savli, Gujarat

Target Applications: Steel, Cement, Mining, Power Plants, Pulp & Paper

Features:

- X-life quality standards
- Advanced sealing, sensor mounts, auto-lubricators
- Adapter, withdrawal & hydraulic sleeves

Strengthened localization commitment by widening the existing portfolio

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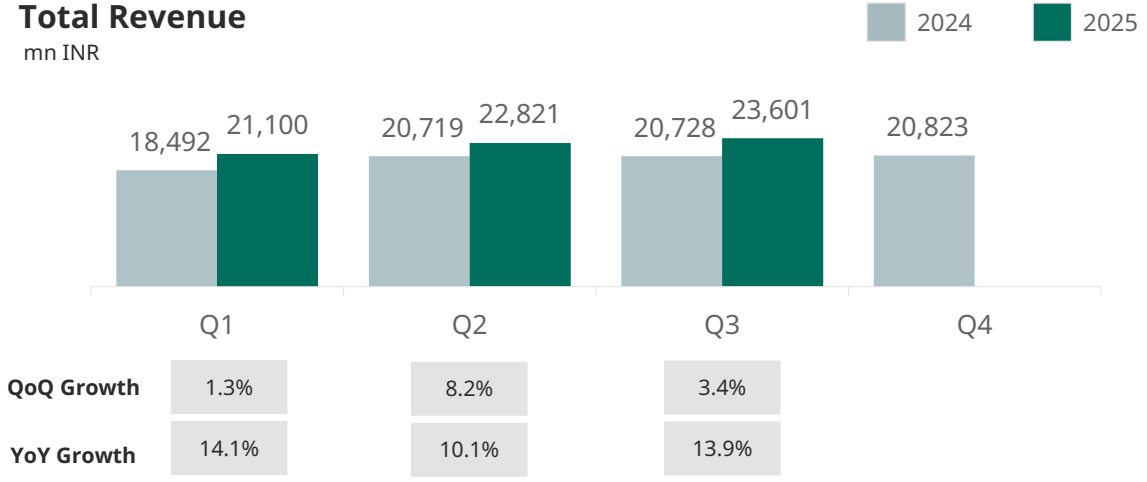
Revenue from operations

Total Revenue

mn INR



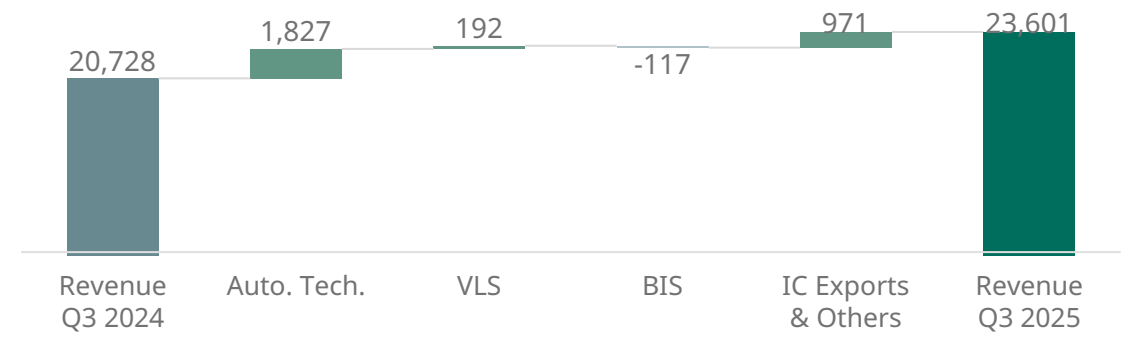
Key Aspects

- YoY Double digit growth continues, domestic business up 10.5% YoY
- QoQ trend remains positive, domestic business up 5.0%

Growth	9M'25 vs 9M'24	Q3'25 vs Q2'25	Q3'25 vs Q3'24
Automotive Technologies	18.7%	15.9%	28.8%
Vehicle Lifetime Solutions	10.6%	-8.1%	7.4%
Bearings and Industrial Solutions	4.1%	0.8%	-1.3%
Intercompany Exports & others	27.5%	-4.5%	37.2%

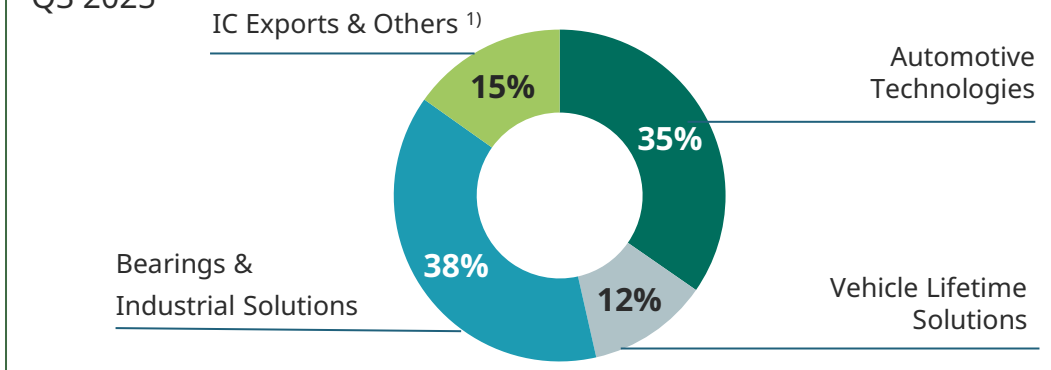
Revenue Bridge

mn INR



Sales Mix

Q3 2025



IC Exports – Intercompany Exports; 1) Exports mainly includes exports to group companies, scrap sale and other operating income

Note : Business highlights on Standalone Financials

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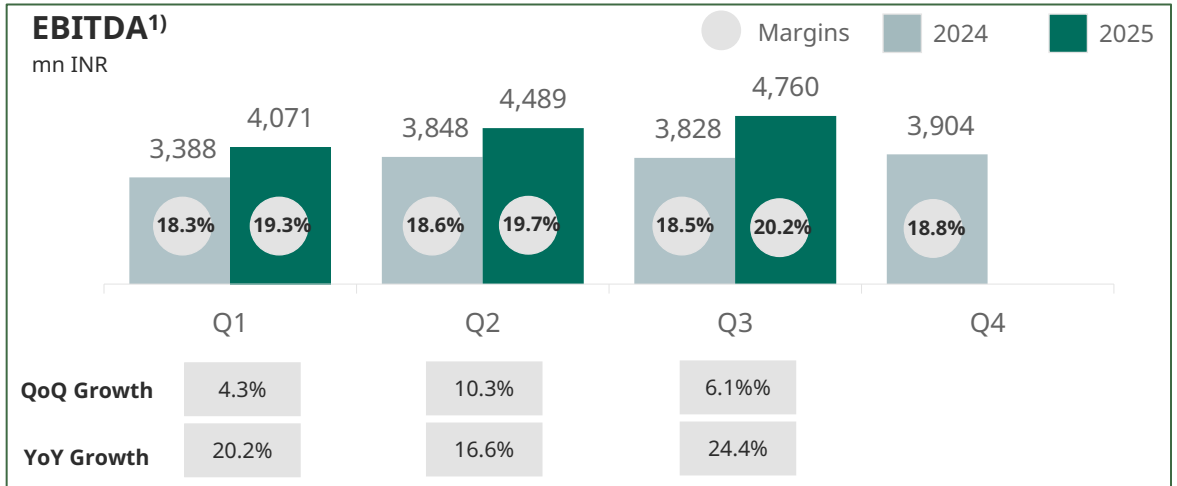
Earnings Quality

EBITDA[1)]

mn INR

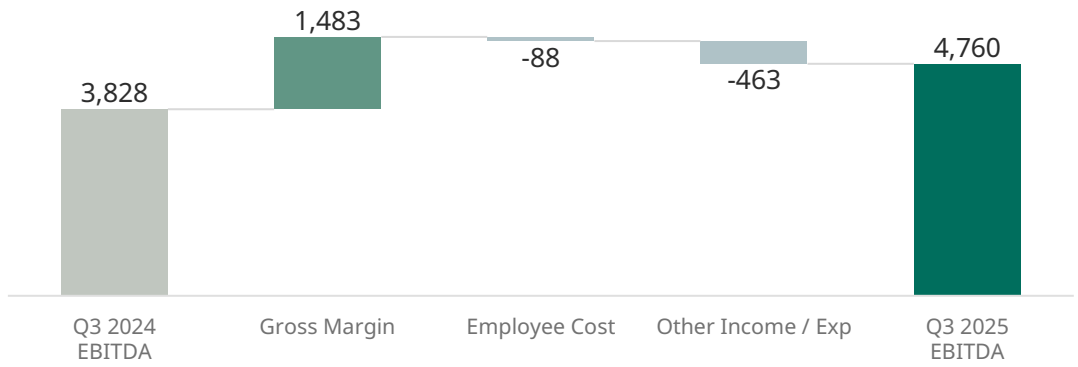


Key Aspects

- Operating margin improved due to volume gains and fixed cost absorption

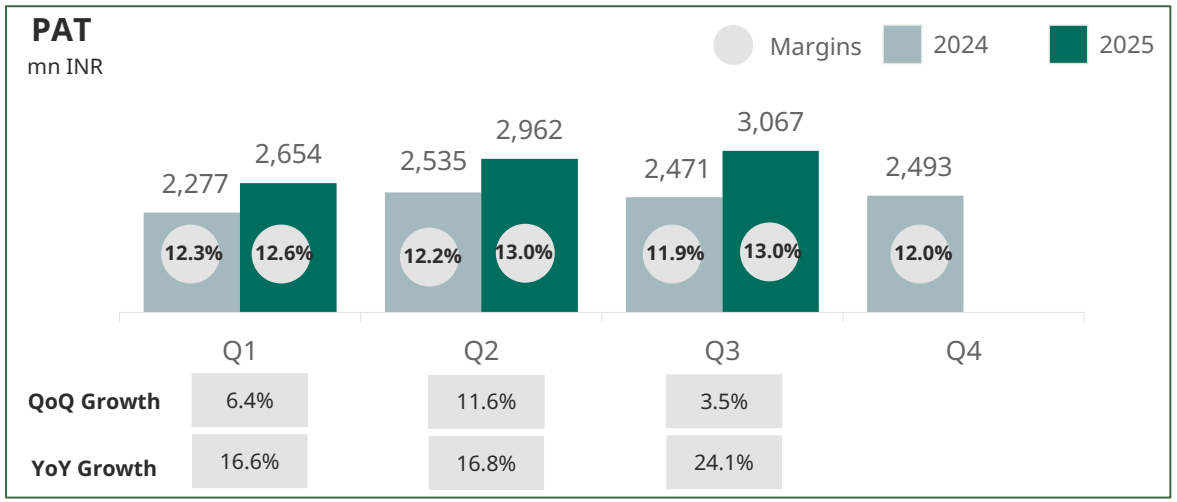
EBITDA Bridge

mn INR



PAT

mn INR



[1]EBITDA (before exceptional items) - interest income (net) at 209 mn INR in Q3'25 (204 mn INR Q3'24)

Note : Business highlights on Standalone Financials

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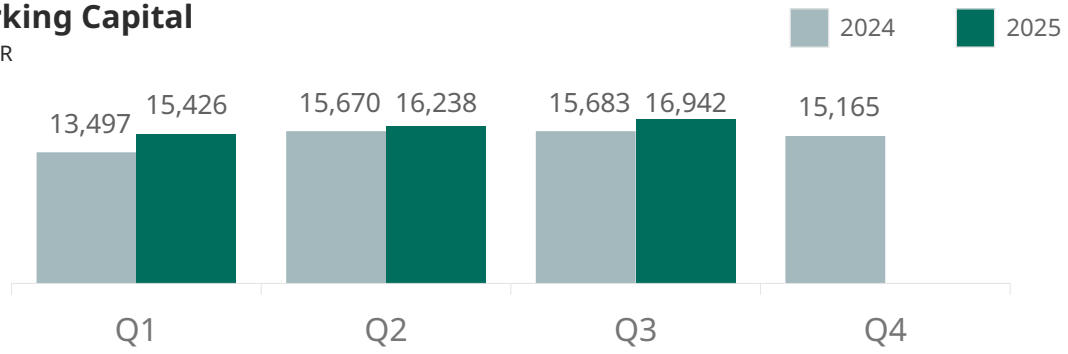
Working Capital, Capex

Working Capital

mn INR



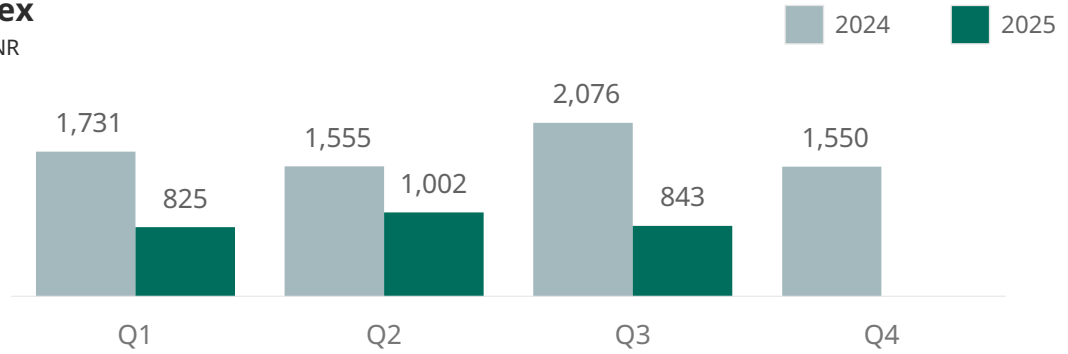
	3M'24	3M'25	6M'24	6M'25	9M'24	**9M'25**	12M'24
% to sales	18.5%	18.5%	20.2%	18.7%	19.8%	**19.0%**	19.0%

Key Aspects

- Working Capital changes in anticipation of demand due to GST reforms
- Capex – focus remains on growth and localization moving
- Improved free cash flow generation due to better margins and capital efficiency

Capex

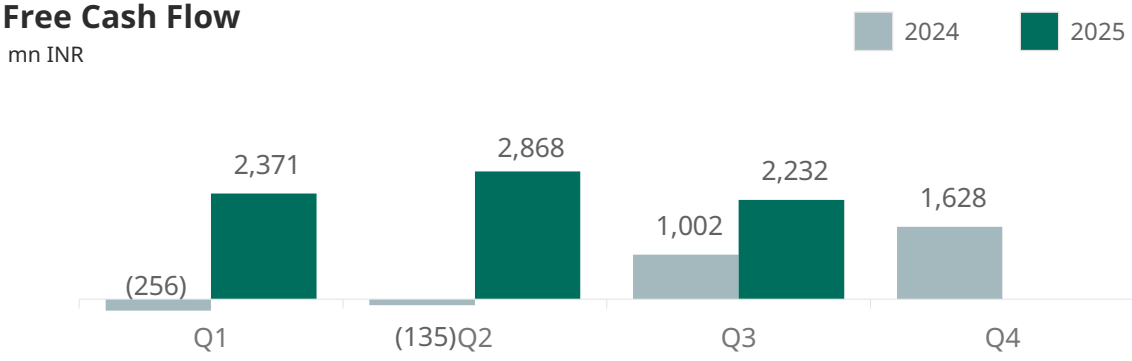
mn INR



	3M'24	3M'25	6M'24	6M'25	9M'24	**9M'25**	12M'24
% to sales	9.4%	3.9%	8.4%	4.2%	8.9%	**4.0%**	8.6%

Free Cash Flow

mn INR



	Q1	Q2	Q3
YoY Change	1026.1%	2224.4%	122.7%

Note : Business highlights on Standalone Financials

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Performance Indicators

	Unit	Q3 2025	Q2 2025	Q3 2024	9M 2025	9M 2024
Revenue	mn INR	**23,601**	**22,821**	**20,728**	**67,523**	**59,940**
Revenue growth (YoY)	%	**13.9%**	**10.1%**	**12.1%**	**12.7%**	**11.6%**
Revenue growth (QoQ)	%	3.4%	8.2%	0.04%	-	-
EBITDA[1)]	mn INR	4,760	4,489	3,828	13,320	11,064
EBITDA Margin	%	**20.2%**	**19.7%**	**18.5%**	**19.7%**	**18.5%**
EBIT	mn INR	3,920	3,718	3,128	10,916	9,125
EBIT Margin	%	**16.6%**	**16.3%**	**15.1%**	**16.2%**	**15.2%**
EBT	mn INR	4,129	3,980	3,332	11,666	9,787
EBT Margin	%	**17.5%**	**17.4%**	**16.1%**	**17.3%**	**16.3%**
PAT	mn INR	3,067	2,962	2,471	8,683	7,283
PAT Margin	%	**13.0%**	**13.0%**	**11.9%**	**12.9%**	**12.2%**
Capex[2)]	mn INR	843	1,002	2,076	2,670	5,362
FCF	mn INR	2,232	2,868	1,002	7,471	611

[1)] EBITDA (before exceptional items) - interest income (net) at 209 mn INR in Q3'25 (204 mn INR Q3'24); [2)] Capex includes CWIP
Note : Performance indicators on Standalone Financials

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Q3 2025 - Consolidated Financial Results

Particulars (mn INR)	Schaeffler India Limited Standalone Q3 2025	KRSV Innovative Auto Solutions Private Limited Q3 2025	Schaeffler India Limited Consolidated[1)] Q3 2025
Revenue	23,601	748	24,346
EBITDA (before exceptional)	20.2%	-14.7%	19.1%
EBIT (before exceptional)	16.6%	-16.7%	15.5%
EBT (before exceptional)	17.5%	-20.1%	16.2%

[1]Consollidated results are net of consolidation effects

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In Summary

1. Double-digit YoY growth momentum continued
2. Better operating margin due to volume and fixed cost absorption
3. Continued improvement in financial and operating metrics
4. Committed to deliver results and drive value as we enter last quarter of the year

On track to build the leading Motion Technology Company

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