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Schaeffler India Limited

Investor Presentation

February 25, 2026

We pioneer motion

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Q4 2025 Awards and Accolades



Certificate for Best Supplier



Award for Best Supplier



Certificate for timely component supply



Doing good for Women & Inclusion, Employability & Livelihood



Excellence in Water Management

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1 **Economy and Industry**

2 Business Highlights - Q4 and 12M 2025

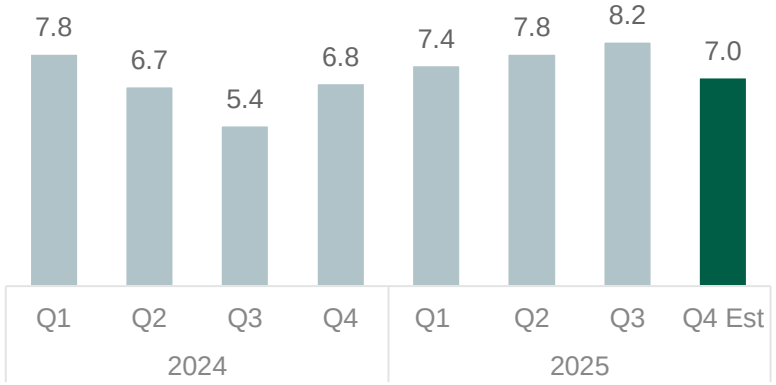
3 Financial Highlights - Q4 and 12M 2025

AGENDA

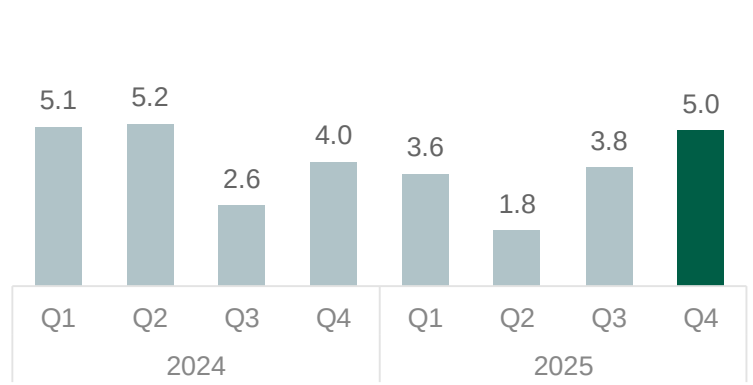
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Economy

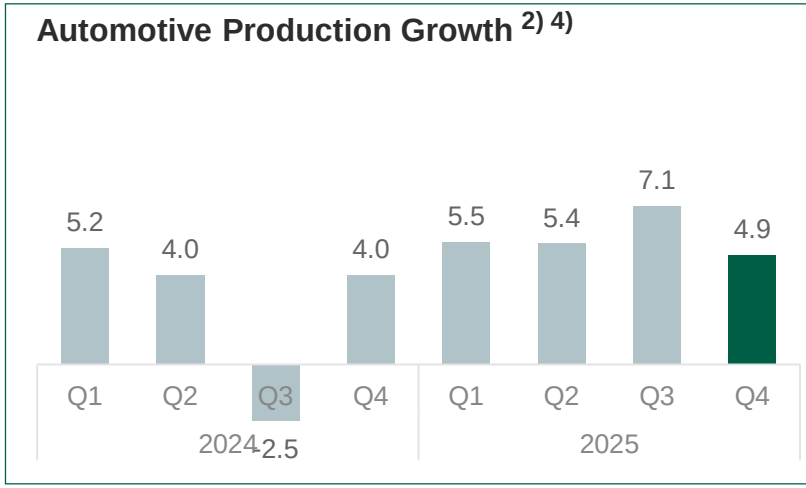
GDP [1) 3)]



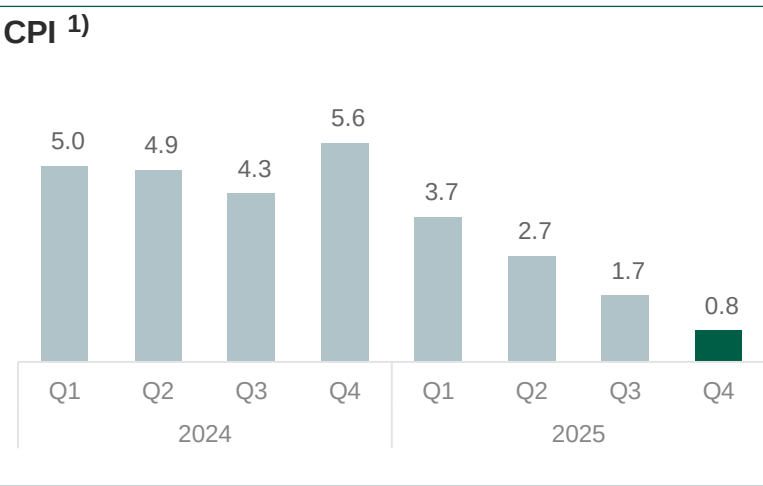
IIP [1) 3)]



Automotive Production Growth [2) 4)]



CPI [1)]



Key Aspects

- GDP – Growth moderated, sustaining resilience through infrastructure push, and robust services momentum.
- IIP – Strong growth supported by policy reforms and capex momentum.
- Automotive – Q4 YoY growth for CVs at 12.2% for PVs at 18.9% and for Tractors at 31.5%.
- CPI – CPI eased due to deflation from food and fuel prices supported from monetary stability.

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.
- Growth rates of the three sectors, Mining, Manufacturing and Electricity for the month of Dec are 6.8%, 8.1% and 6.3% respectively.
- Automotive Production includes PVs, CVs, & Tractors with production share of 71%, 15% & 14% 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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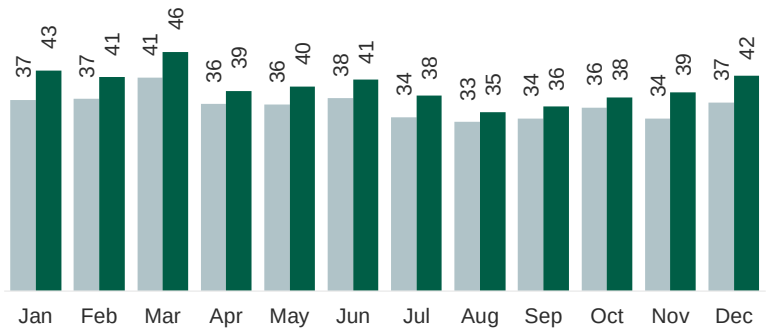
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Core Sector Performance

2024 2025 YTD CY2025 Growth

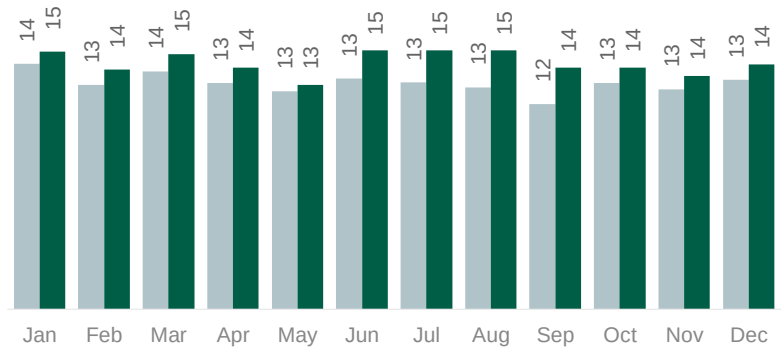
Cement Production (mn tn)

10.0%



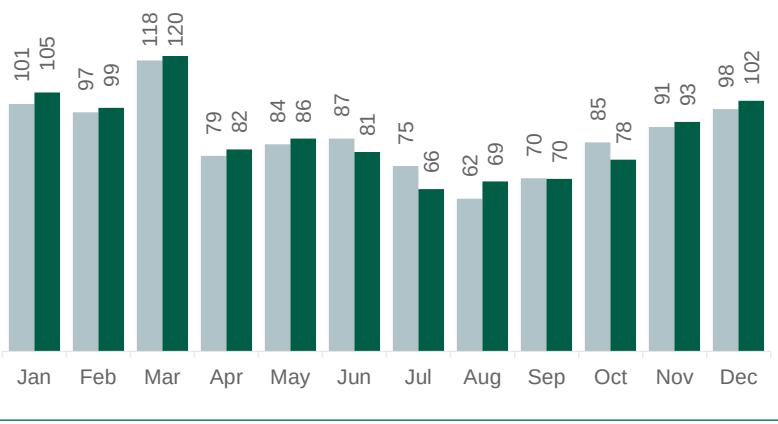
Steel Production (mn tn)

8.9%



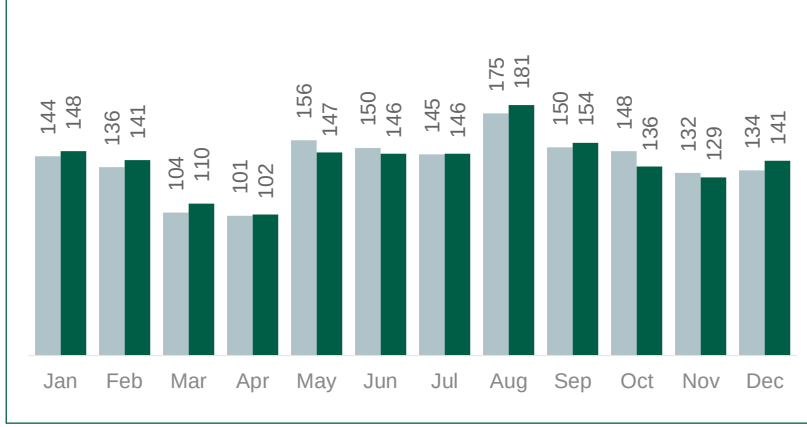
Coal Production (mn tn)

0.3%



Electricity Generation (bn KwH)

0.3%



Source of core sectors data: Office of Economic Advisor

Key Aspects

Core industry growth for YTD'25 registered at 2.7% compared to 4.9% 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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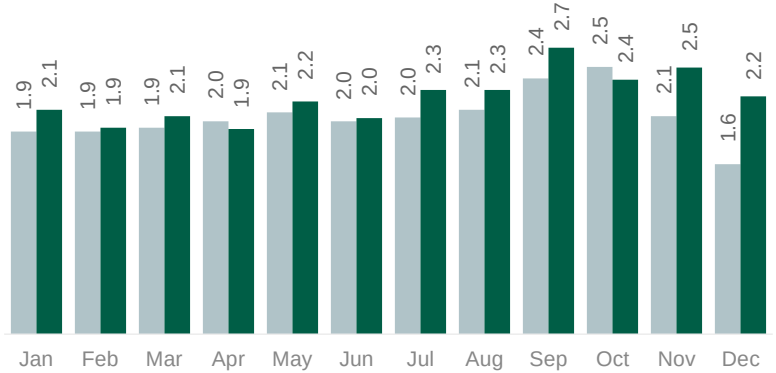
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Automotive Sector Performance

2024 2025 YTD CY2025 Growth

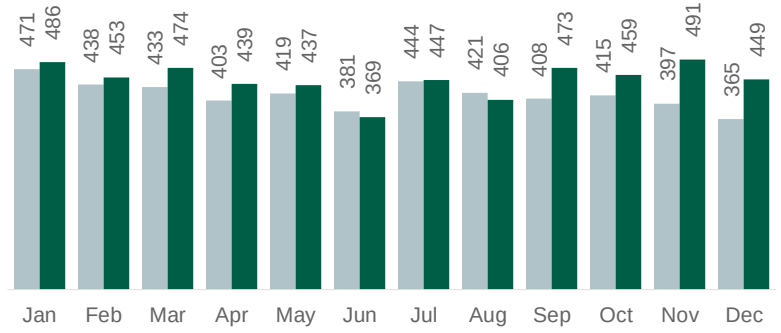
Two and three wheelers (mn units)[1)]

8.6%



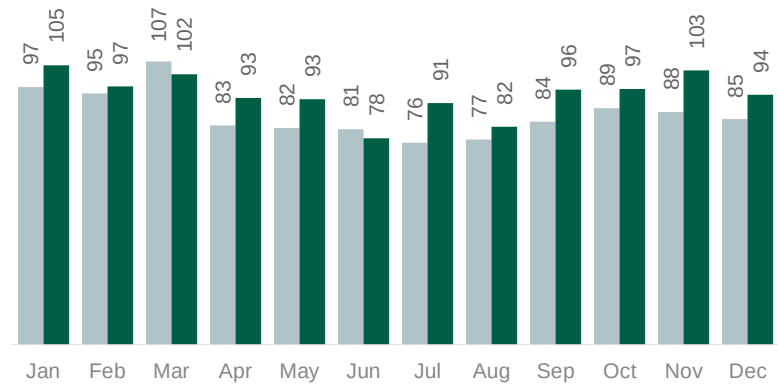
Passenger Vehicles (th units)[2)]

7.8%



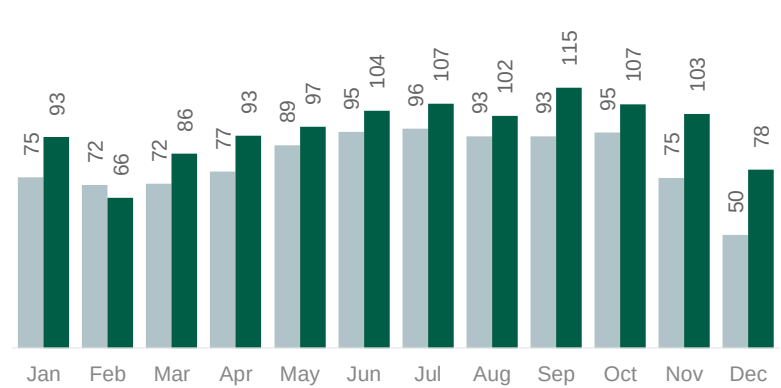
Commercial Vehicles (th units)[2)]

8.4%



Agricultural Tractors (th units)[3)]

17.2%



Key Aspects

- Two and three wheelers – Growth driven by GST rate reductions and government support for electric mobility.
- PVs – Growth driven by infrastructure investments and evolving consumer preferences.
- CVs Infrastructure spending fueled growth.
- Tractors - Growth driven by rising disposable income of farmers and continued focus on agricultural infrastructure.

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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1 Economy and Industry

2 **Business Highlights - Q4 and 12M 2025**

3 Financial Highlights - Q4 and 12M 2025

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Q4 2025 Performance

Key messages

1. Growth momentum continues, aided by double digit growth across all divisions
2. Operating margins continued to improve due to localization benefits, volume gains and focus on capital efficiency
3. Free cash flow generation and capex realization – as planned
4. Concluding the year with sustained double-digit growth supported by operational efficiency and disciplined capital allocation

Revenue	EBITDA
26.9% vs Q4'24 12.0% vs Q3'25 **26,431 mn INR**	19.1% Q4'25 20.2% Q3'25 **5,056 mn INR**
PAT	**FCF**
12.4% Q4'25 13.0% Q3'25 **3,280 mn INR**	1,628 mn INR Q4'24 2,232 mn INR Q3'25 **2,540 mn INR**

EBITDA : Earning Before Interest, Tax and Depreciation (before exceptional item), FCF : Free Cashflow
Note : Q4 2025 performance comments on Standalone Financials

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Business Developments

Automotive Technologies



Precision and Longevity

- New business wins in hydraulic cam phasers
- Continued momentum in PV Clutches & DMF
- Business wins for LV Clutches with 6 years of life

Vehicle Lifetime Solutions



Increased market coverage

- Volume wins continued for new launches during the year
- Continued deal wins for FEAD / Timing Kit in the PV segment
- Continued focus on portfolio expansion and penetration through range extension

Bearings and Industrial Solutions



Advanced motion solution

- New business wins for DGBB, NRB (HK Type) in the two-wheeler segment
- Business nomination for needle bearings, lift mast rollers in offroad segment
- Business wins for 4R & 2R CRBs, SRBs, TRBs in raw material sector

1) TW - Two-wheelers, CV - Commercial Vehicles, PV - Passenger Vehicles

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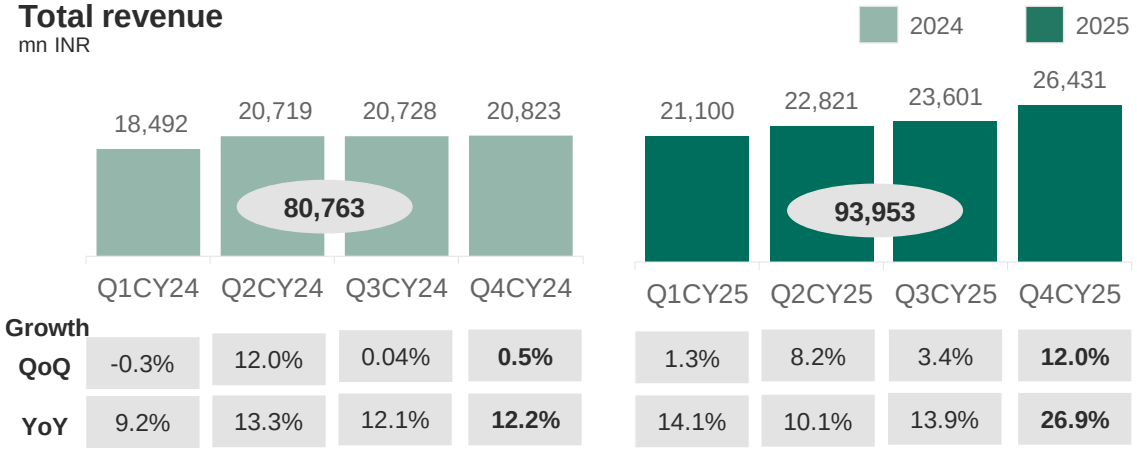
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Revenue from operations

Total revenue

mn INR



Growth	Q1CY24	Q2CY24	Q3CY24	Q4CY24	Q1CY25	Q2CY25	Q3CY25	Q4CY25
QoQ	-0.3%	12.0%	0.04%	**0.5%**	1.3%	8.2%	3.4%	**12.0%**
YoY	9.2%	13.3%	12.1%	**12.2%**	14.1%	10.1%	13.9%	**26.9%**

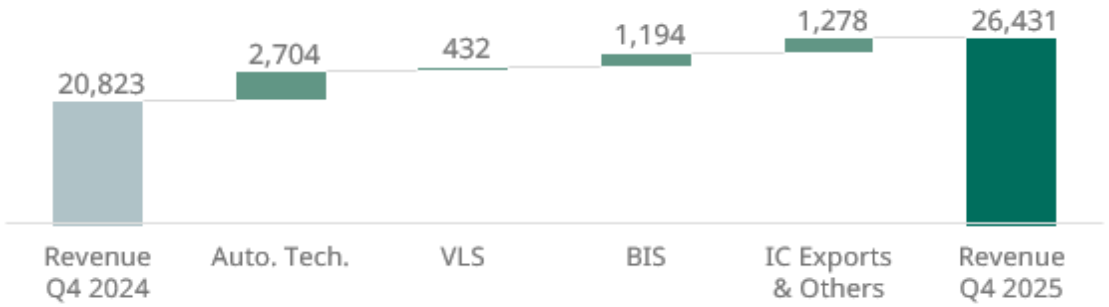
Key Aspects

- YoY Double digit growth continues, domestic business up 23.8%
- QoQ trend remains positive, domestic business up 12.7%

Growth	12M'25 vs 12M'24	Q4'25 vs Q3'25	Q4'25 vs Q4'24
Automotive Technologies	24.6%	12.5%	41.6%
Vehicle Lifetime Solutions	12.2%	8.6%	16.6%
Bearings and Industrial Solutions	6.4%	14.1%	13.1%
Intercompany Exports & others	32.7%	8.1%	49.2%

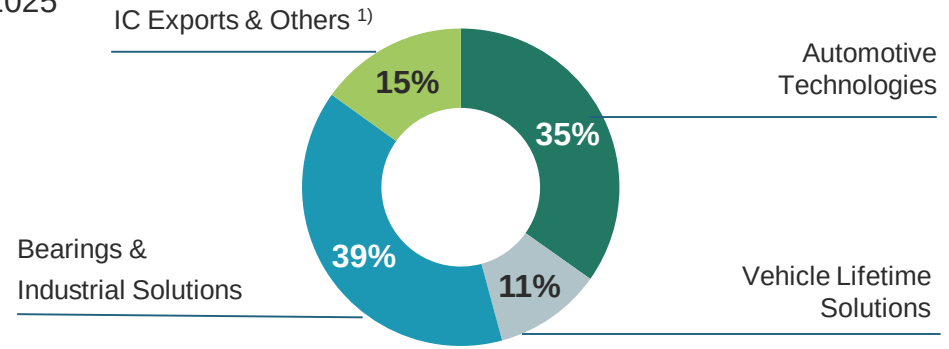
Revenue Bridge

mn INR



Sales Mix

Q4 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

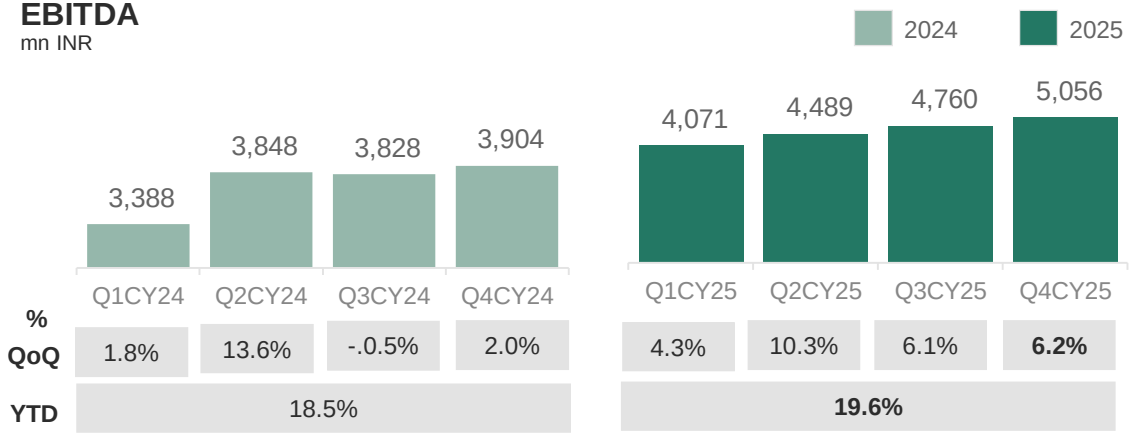
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Earnings Quality

EBITDA

mn INR

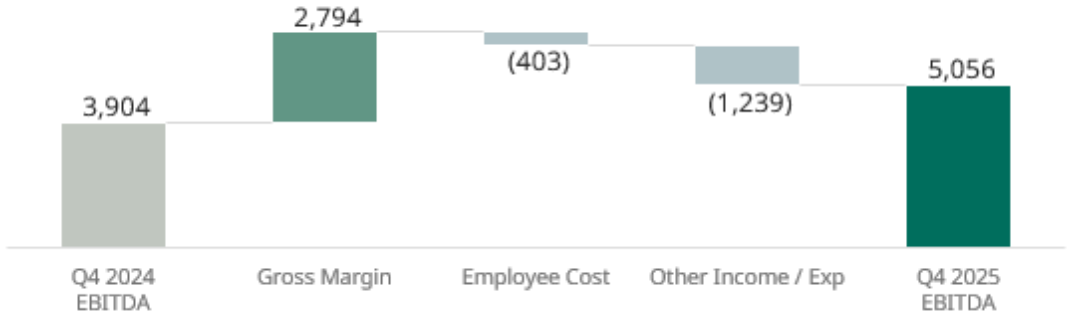


Key Aspects

- Operating margin – improved. Volumes, capital efficiency and strategic focus on localization.
- Absorbed impact due to regulatory changes on labor code at -0.8% for the quarter

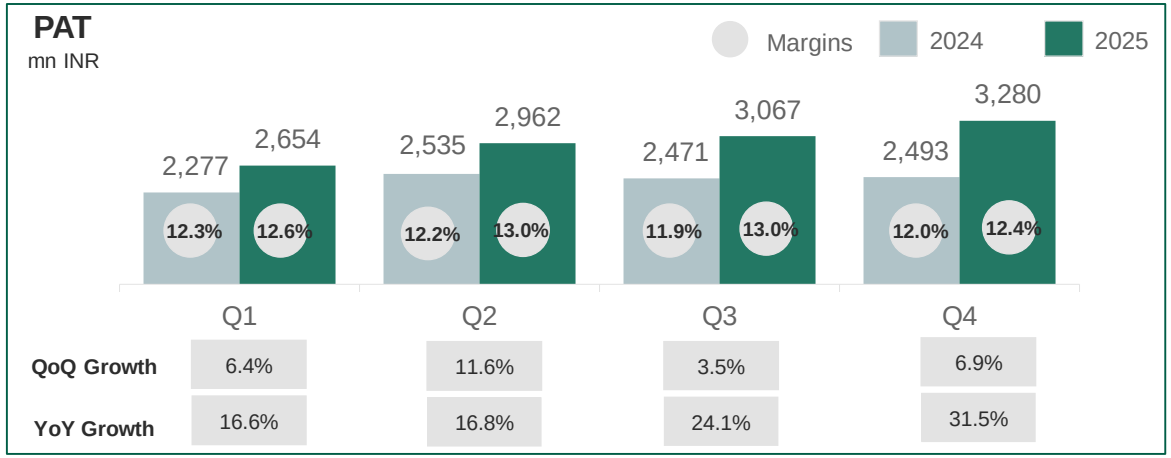
EBITDA Bridge

mn INR



PAT

mn INR



EBITDA (before exceptional items) - interest income (net) at 282 mn INR in Q4'25 (231 mn INR Q4'24);
Note : Performance indicators on Standalone Financials

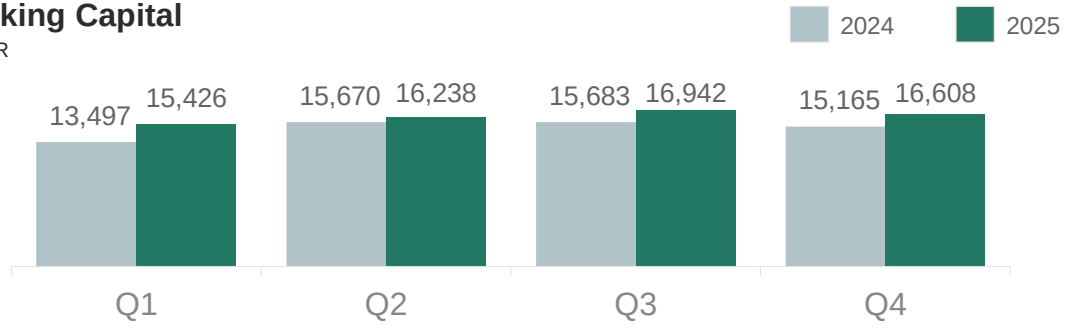
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Working Capital, Capex

Working Capital

mn INR



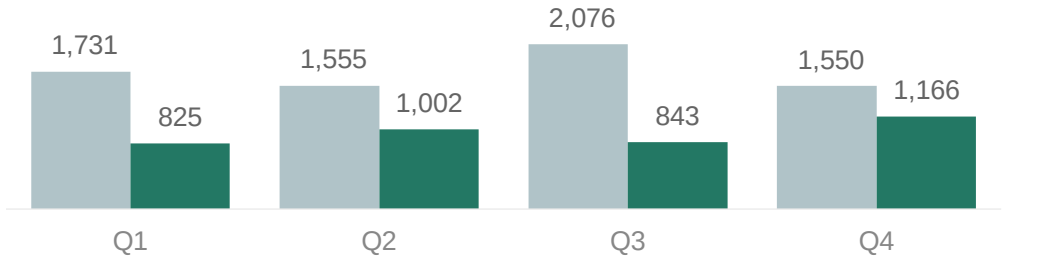
	3M'24	3M'25	6M'24	6M'25	9M'24	9M'25	12M'24	**12M'25**
% to sales	18.5%	18.5%	20.2%	18.7%	19.8%	19.0%	19.0%	**17.9%**

Key Aspects

- Capex framework as planned
- Free cash flow generation in line, better operating margins and lower working capital

Capex

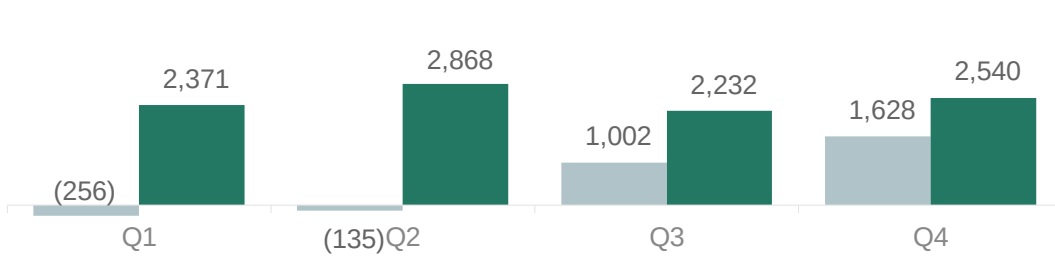
mn INR



	3M'24	3M'25	6M'24	6M'25	9M'24	9M'25	12M'24	**12M'25**
% to sales	9.4%	3.9%	8.4%	4.2%	8.9%	4.0%	8.6%	**4.1%**

Free Cash Flow

mn INR



	Q1	Q2	Q3	Q4
YoY Change	1026.1%	2224.4%	122.7%	56.0%

Note : Business highlights on Standalone Financials

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Performance Indicators

	Unit	Q4 2025	Q3 2025	Q4 2024	12M 2025	12M 2024
Revenue	mn INR	**26,431**	**23,601**	**20,823**	**93,953**	**80,763**
Revenue growth (YoY)	%	**26.9%**	**13.9%**	**12.2%**	**16.3%**	**11.8%**
Revenue growth (QoQ)	%	12.0%	3.4%	0.5%	-	-
EBITDA[1)]	mn INR	5,056	4,760	3,904	18,376	14,969
EBITDA Margin	%	**19.1%**	**20.2%**	**18.8%**	**19.6%**	**18.5%**
EBIT	mn INR	4,173	3,920	3,156	15,088	12,281
EBIT Margin	%	**15.8%**	**16.6%**	**15.2%**	**16.1%**	**15.2%**
EBT	mn INR	4,455	4,129	3,387	16,120	13,175
EBT Margin	%	**16.9%**	**17.5%**	**16.3%**	**17.2%**	**16.3%**
PAT	mn INR	3,280	3,067	2,493	11,962	9,777
PAT Margin	%	**12.4%**	**13.0%**	**12.0%**	**12.7%**	**12.1%**
Capex[2)]	mn INR	1,166	843	1,550	3,836	6,911
FCF	mn INR	2,540	2,232	1,628	10,010	2,239

[1)] EBITDA (before exceptional items) - interest income (net) at 282 mn INR in Q4'25 (231 mn INR Q4'24); [2)] Capex includes CWIP
Note : Performance indicators on Standalone Financials

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Q4 2025 - Consolidated Financial Results

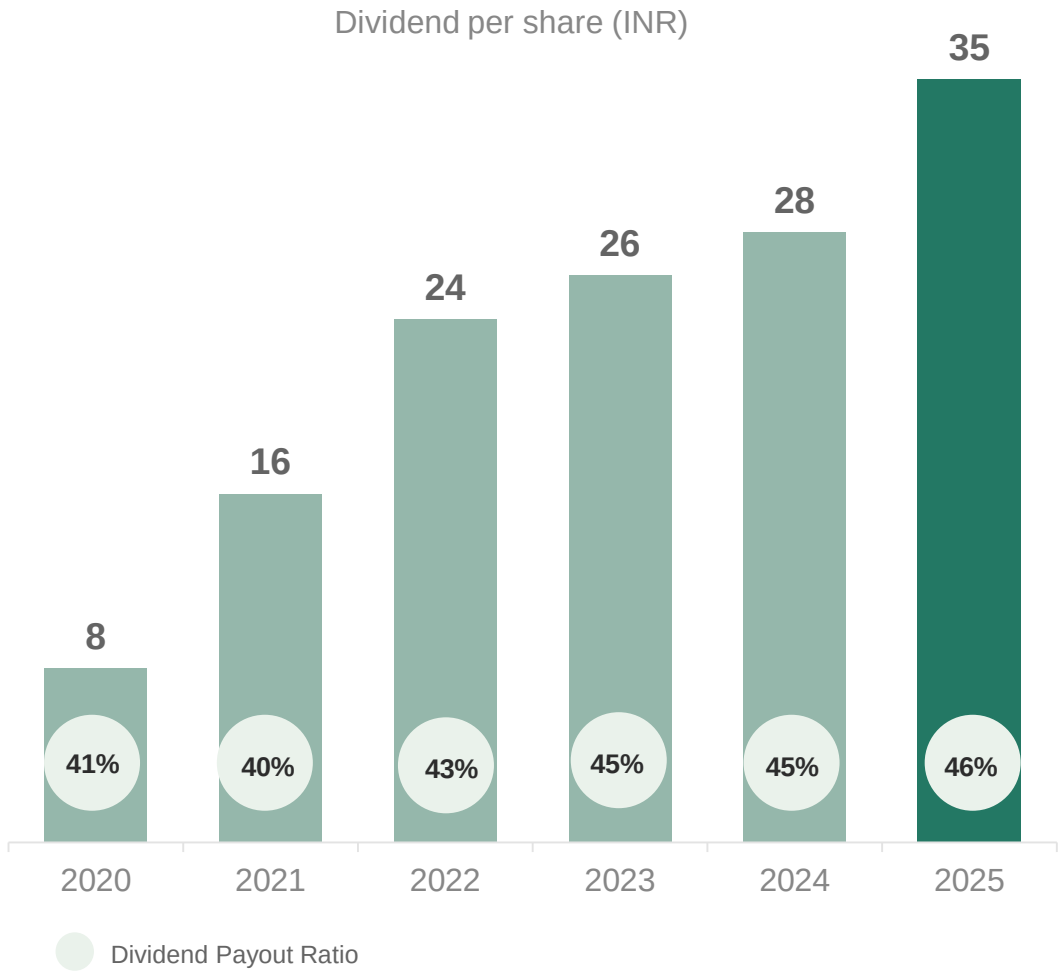
Particulars (mn INR)	Schaeffler India Limited Standalone Q4 2025	KRSV Innovative Auto Solutions Private Limited Q4 2025	Schaeffler India Limited Consolidated[1)] Q4 2025
Revenue	26,431	815	27,242
EBITDA (before exceptional)	19.1%	-18.3%	18.4%
EBIT (before exceptional)	15.8%	-20.0%	15.0%
EBT (before exceptional)	16.9%	-23.6%	15.9%

[1)] Consolidated results are net of consolidation effects

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Dividend Payout



Target dividend payout ratio, 30% to 50% of net income[1]

The Board of Directors of the Company has recommended a dividend for the year ended December 31, 2025, at the rate of INR 35/-per equity share (INR 28 per share for CY2024) of face value INR 2/- each

[1]Net Income – Annual Standalone Profits After Tax (PAT)

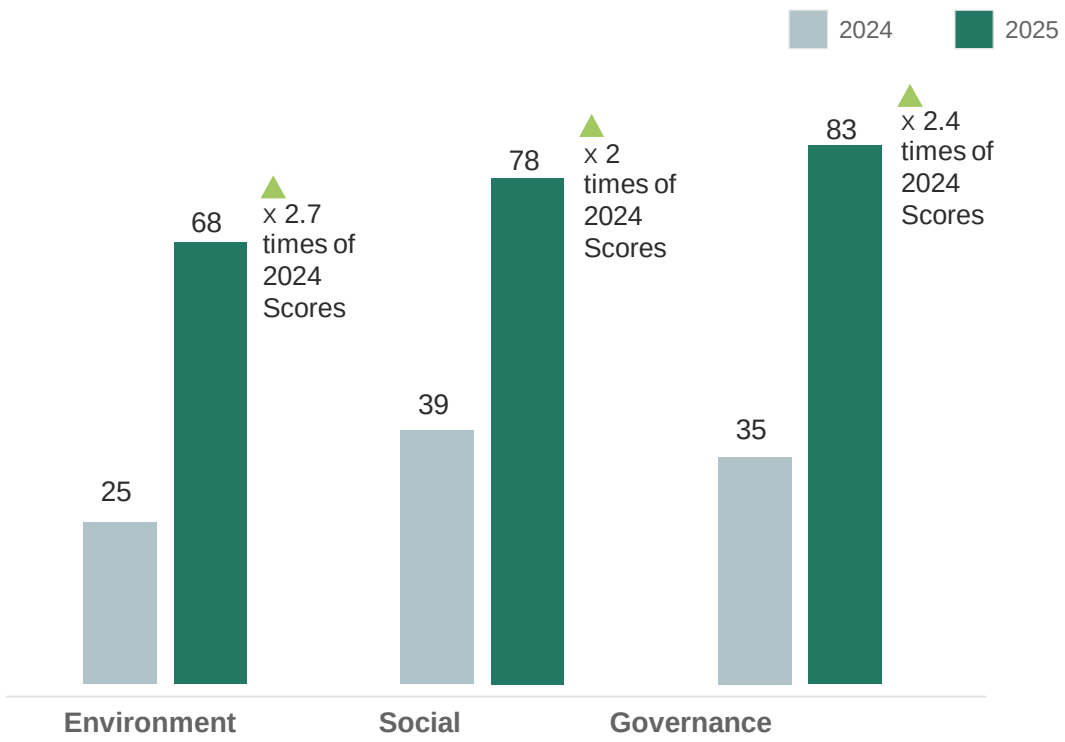
Note: Dividend per share for previous years restated considering face value of INR 2 per equity share for comparable presentation. CY2025 dividend is subject to approval of shareholders.

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S&P CSA Dow Jones | Sustainability Index Scores 2025

Our CSA Score by E, S & G Dimension



Ranking 1st in India & 7th Globally

Overall CSA Score 76/100 — ▲ +40 — ~ **2x** times from CSA 2024 Score of 36/100

Score Percentile 98% — SIL's relative performance as % of peers that achieved an equal or lower score*

Industry Best Score 83/100 — Amongst 402 companies assessed on CSA 2025*

Note: Schaeffler India Limited have been classified by S&P in "Machinery and Electrical Equipment" industry segment

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In Summary

1. Double-digit growth momentum maintained throughout the year

2. Earnings quality improved, aided by volume gains, capital efficiency and strategic focus on localization.

3. Capex realization as per plan, continued focus on financial and operating metrics

4. Entering 2026 committed to deliver results and drive long term stakeholder value.

On track to build the leading Motion Technology Company

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