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Schaeffler India Limited

Investor Presentation

October 29, 2026

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1 **Economy and Industry**

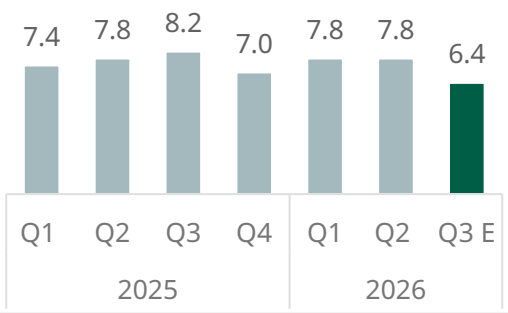
2 Business Highlights – Q3 and 9M 2026

3 Financial Highlights - Q3 and 9M 2026

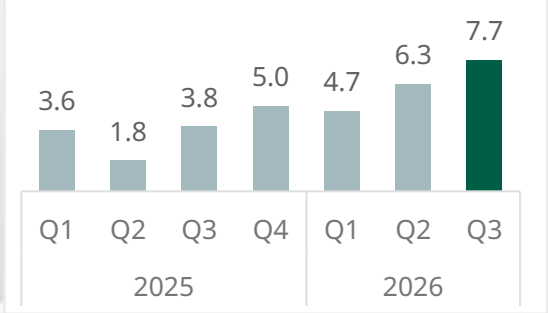
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Economy

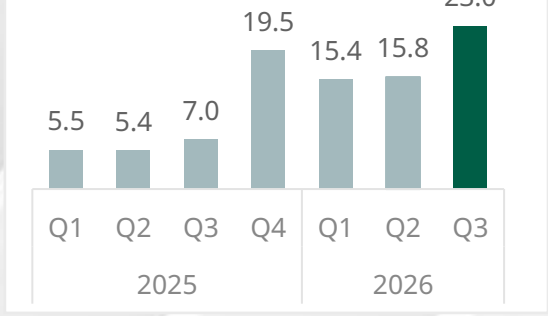
GDP [1) 3) 5)]



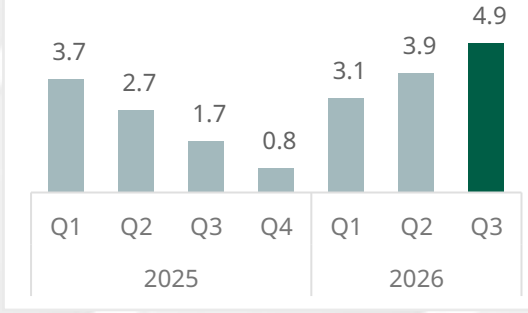
IIP [1) 3) 6)]



Automotive Production [2) 4)]



CPI [1) 3)]



Key messages

- **GDP** – Estimated growth at ~6.4%, marking a slowdown amid global uncertainty.
- **IIP** – Robust growth driven by strong manufacturing output in motor vehicles, electrical and other transport equipment.
- **Automotive** – Q3 YoY growth for CVs at 31.8% for PVs at 25.1% and for Tractors at 6.8%.
- **CPI** – Higher food and energy prices resulted in increase in CPI inflation for the quarter.

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, Electricity and Water Supply for the month of August are -5.6%, 9.0%, 12.3% and 6.3% respectively.
- Automotive Production includes PVs, CVs, & Tractors with production share of 69%, 14% & 16% 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

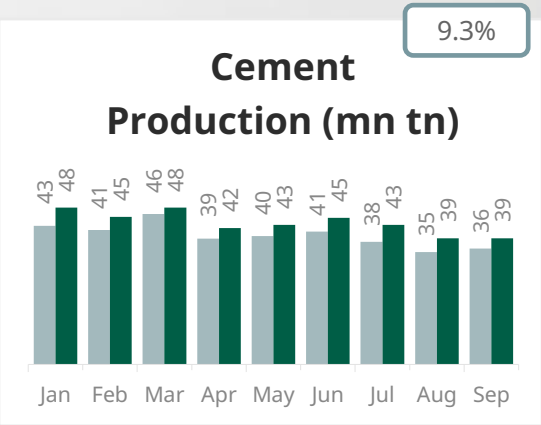
4) Automotive Production includes PVs, CVs, & Tractors
5) GDP data for Q3CY26 is based on estimates
6) IIP Q3 numbers are only for July and August, September data not yet published

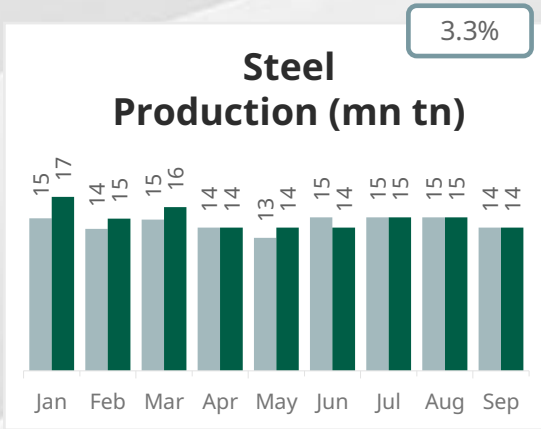
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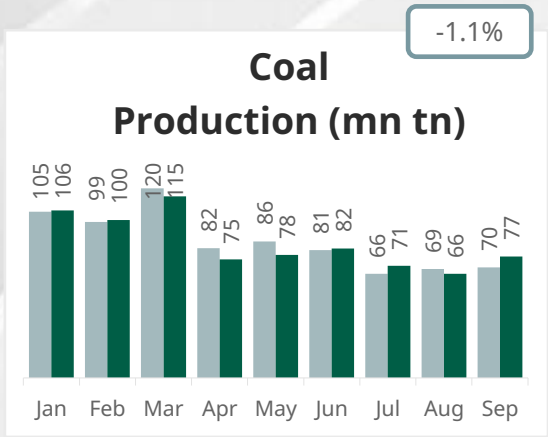
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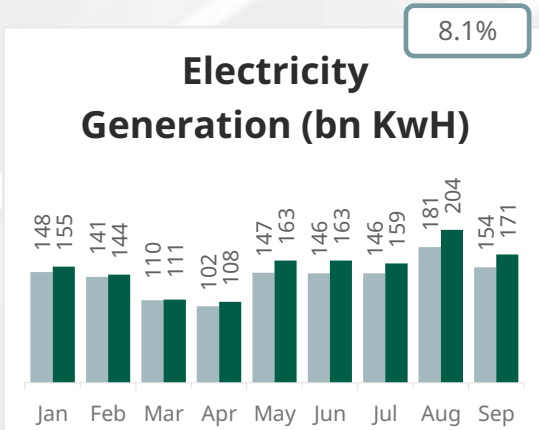
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Core Sector Performance









Key aspects

- Core industry growth for Q2FY27 registered at 6.3% compared to 3.8% for the same period last year.
- Cement production registered growth led by a improving construction and infrastructure activity, while steel production remained stable to support industrial momentum.
- Coal production moderated amid geopolitical instability whereas electricty generation rebounded backed by strong consumption across industrial and household segments.

Sector weightage within core sectors

Sector	% weight
Cement	4.4%
Steel	17.5%
Coal	5.6%
Electricity	30.9%

Source of Data: Core sectors data - Office of Economic Advisor

2025 2026 YTD CY2026 Growth

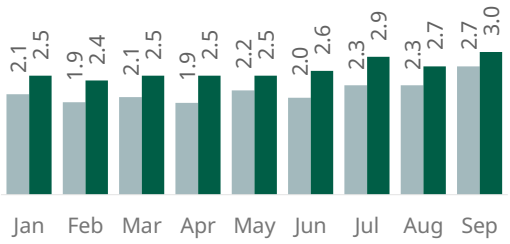
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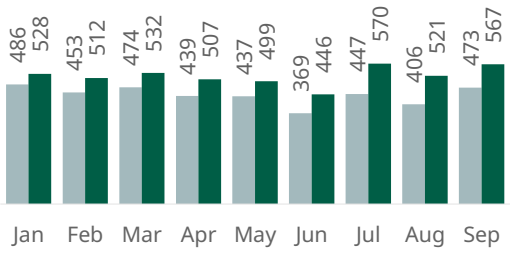
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Automotive Sector Performance

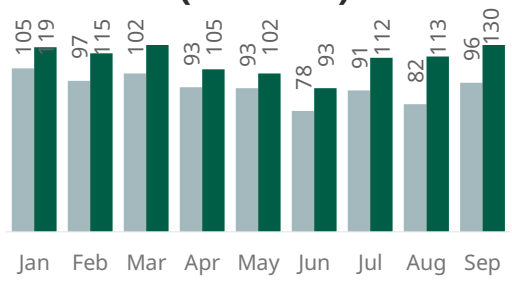
Two and three wheelers (mn units)[1)]



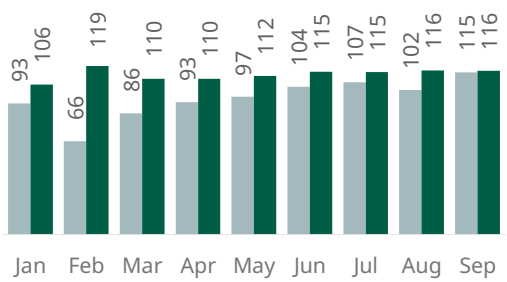
Passenger Vehicles (th units)[2)]



Commercial Vehicles (th units)[2)]



Agricultural Tractors (th units)[2)]



Key aspects

- **Two and three wheelers** – Growth driven by pre-festive inventory build-up and new product launches.
- **PVs and CVs** – Volumes improved on the back of infrastructure spending and positive consumer sentiment.
- **Tractors** – Stable growth aided by favourable monsoons and strong rural cash flows.

Year to Date (YTD) Growth

Vehicle	YTD Growth
2W and 3W	20.4%
PVs	17.6%
CVs	20.7%
Tractors	18.0%

Source of data :
[1)] SIAM : Society of Indian Automobile Manufacturers
[2)] TMA : Tractor Manufacturers Association
Note: 2W – Two wheelers, 3W- Three-wheeler , CV – Commercial Vehicles, PV – Passenger Vehicles, AT- Agricultural Tractors

2025 2026

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1 Economy and Industry

2 **Business Highlights - Q3 and 9M 2026**

3 Financial Highlights - Q3 and 9M 2026

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Q3 2026 Performance

Key messages

1. Double digit growth momentum in domestic and exports business
2. Earnings quality marginally impacted given increased input costs and continued adverse effects of fuel price
3. Working capital increase is mainly due to inventories and overdues, remains in focus
4. Capex – framework remains on track

Revenue
30,058
mn INR
27.4% vs Q3'25
12.1% vs Q2'26

EBITDA
5,617
mn INR
18.7% Q3'26
19.1% Q2'26

PAT
3,704
mn INR
12.3% Q3'26
12.6% Q2'26

FCF
408
mn INR
-81.7% vs Q3'25
-57.8% vs Q2'26

EBITDA : Earning Before Interest, Tax and Depreciation (before exceptional item), FCF : Free Cashflow, PAT: Profit After Tax
Note : Q3 2026 performance comments on Standalone Financials

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Business Developments

AUTOMOTIVE TECHNOLOGIES

Precision and Longevity

- Business Wins for Engine Components like HLA-RFF and Roller Tappets
- New wins for rock arm assembly
- Continued momentum in Clutch for passenger vehicles



VEHICLE LIFETIME SOLUTIONS

Increased Market Coverage

- Business wins for FEAD timing kits, bearings and lubricants continued
- Launched focus campaigns and workshop engagement programs
- Continued focus on portfolio expansion and penetration through range extension

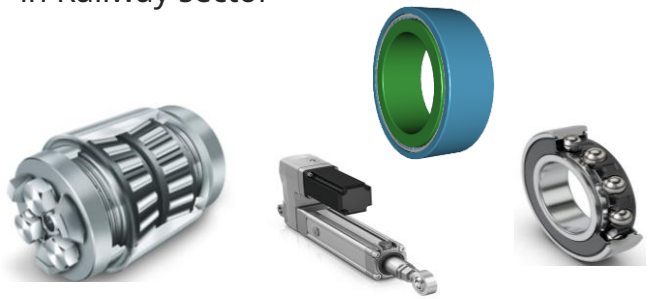




BEARINGS AND INDUSTRIAL SOLUTIONS

Advance Motion Solutions

- New business wins for DGBBs, CRBs and NRBs in Automotive Bearings segment
- Business wins for actuators and Bottom roller bearing in industrial automation sector
- New wins for TAROL Metro, CRBs and TRBs in Railway sector



TRB - Tapered roller bearing, NRB- Needle roller bearing, HLA-RFF- Hydraulic Lash Adjusters and Roller finger followers
CRB - Cylindrical roller bearing, DGBBs- Deep Groove Ball Bearing, FEAD- Front End Accessory Drive

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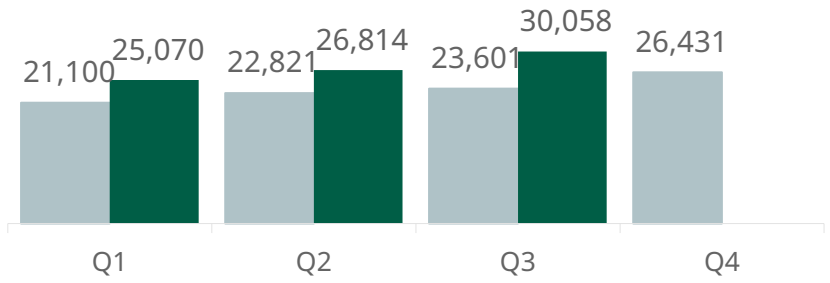
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Revenue from operations

Total revenue

mn INR

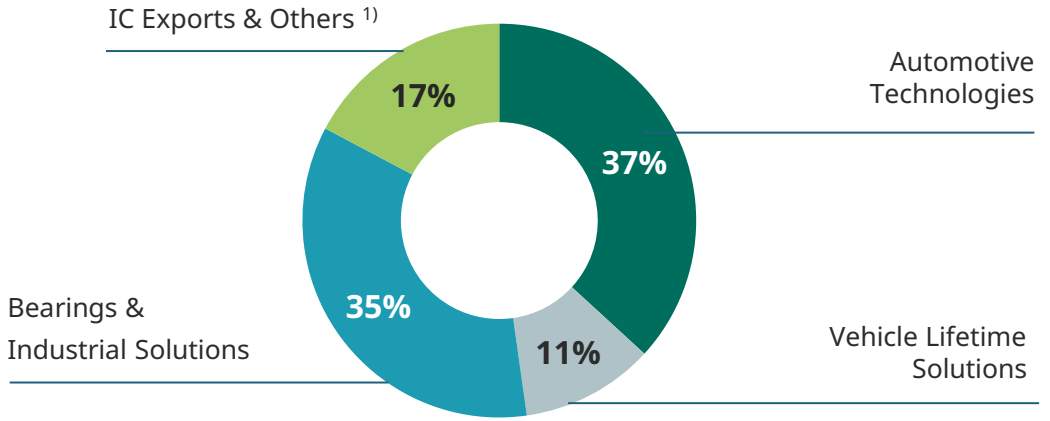


	Q1	Q2	Q3
QoQ Growth	-5.1%	7.0%	12.1%
YoY Growth	18.8%	17.5%	27.4%

Growth	Q3'26 vs Q2'26	Q3'26 vs Q3'25
Automotive Technologies	17.3%	34.9%
Vehicle Lifetime Solutions	2.0%	22.0%
Bearings and Industrial Solutions	10.2%	14.7%
Intercompany Exports & others	12.7%	46.3%

Sales Mix

Q3 2026



Key aspects

- YoY double digit growth across all businesses, domestic business up 24.0% and exports up 46.3%
- QoQ domestic business showed strong growth at 12.0% and exports at 12.7%

IC Exports – Intercompany Exports; 1) Exports mainly include exports to group companies, scrap sale and other operating income
Note : Business highlights on Standalone Financials

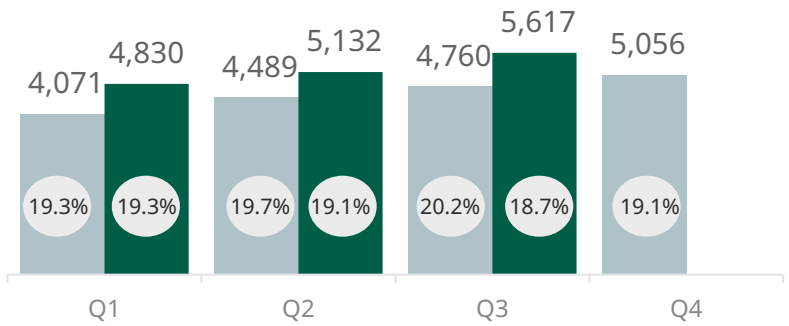
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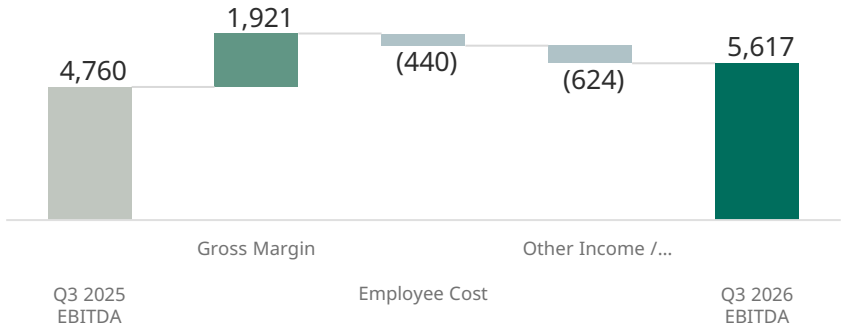
Earnings Quality

EBITDA
mn INR

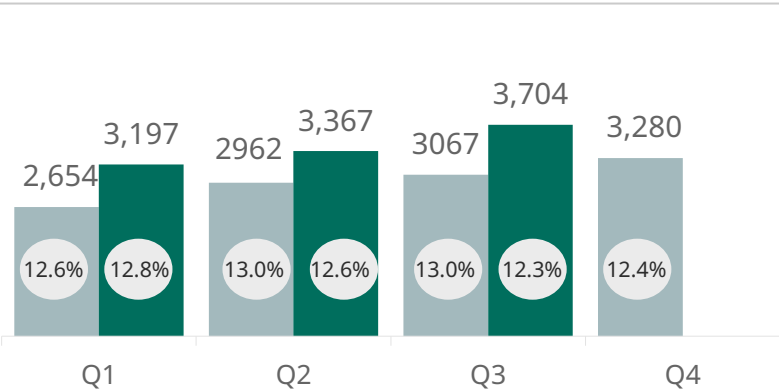


	Q1	Q2	Q3	Q4
QoQ Growth	-2.5%	6.3%	9.4%	
YoY Growth	20.5%	14.3%	18.0%	

EBITDA Bridge
mn INR



PAT
mn INR



	Q1	Q2	Q3	Q4
QoQ Growth	-4.5%	5.3%	10.0%	
YoY Growth	18.6%	13.7%	20.8%	

Key aspects

- Earnings quality continued to be marginally impacted given input price increase, fuel prices and depreciating INR

EBITDA (before exceptional items) – Earning Before Interest, Tax, Depreciation and Amortization) - interest income (net) at 252 mn INR in Q3'26 (209 mn INR in Q3'25)
PAT: Profit After Tax
Note : Performance indicators on Standalone Financials

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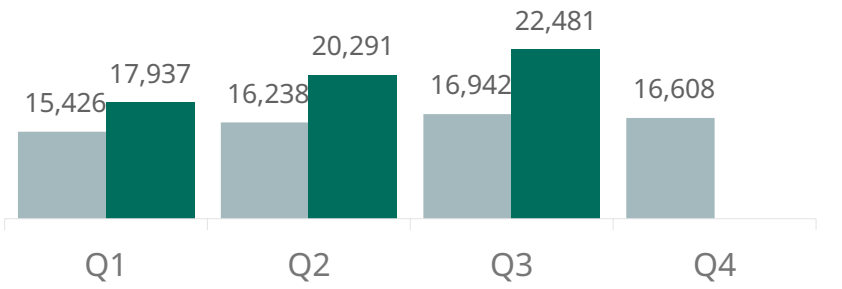
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Working Capital and Capex

Working Capital

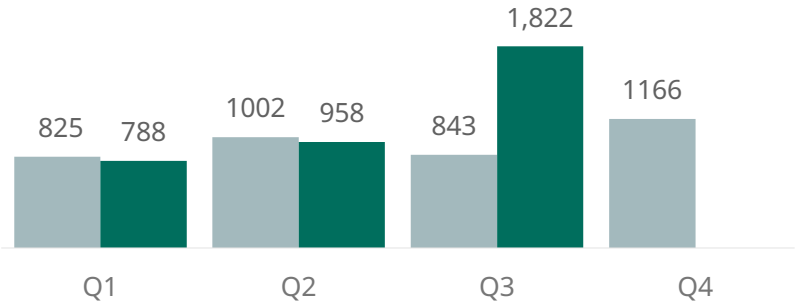
mn INR



	3M'25	3M'26	6M'25	6M'26	9M'25	9M'26	12M'25
% to sales	18.5%	17.9%	18.7%	19.7%	19.0%	20.7%	17.9%

Capex

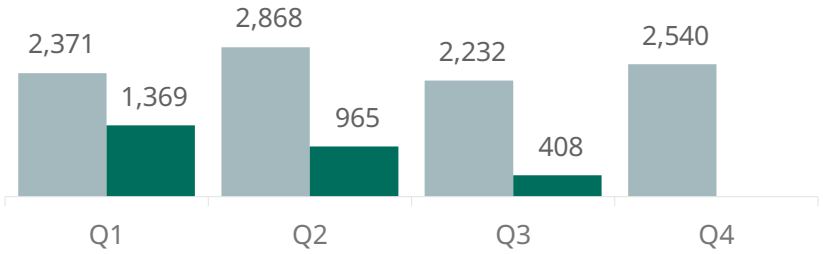
mn INR



	3M'26	6M'26	9M'26
% to sales	3.1%	3.4%	4.4%

Free Cash Flow

mn INR



	Q1	Q2	Q3
YoY Change	-42.2%	-66.3%	-81.7%

Key aspects

- Capex – framework on track
- Free cash flow generation – impacted by increase in working capital

Note : Business highlights on Standalone Financials

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Performance Indicators

	Unit	Q3 2026	Q2 2026	Q3 2025	9M 2026	9M 2025
Revenue	mn INR	**30,058**	**26,814**	**23,601**	**81,942**	**67,523**
Revenue growth (YoY)	%	**27.4%**	**17.5%**	**13.9%**	**21.4%**	**12.7%**
Revenue growth (QoQ)	%	12.1%	7.0%	3.4%	-	-
EBITDA[1)]	mn INR	5,617	5,132	4,760	15,579	13,320
EBITDA Margin	%	**18.7%**	**19.1%**	**20.2%**	**19.0%**	**19.7%**
EBIT	mn INR	4,718	4,259	3,920	12,938	10,916
EBIT Margin	%	**15.7%**	**15.9%**	**16.6%**	**15.8%**	**16.2%**
EBT	mn INR	4,970	4,525	4,129	13,752	11,666
EBT Margin	%	**16.5%**	**16.9%**	**17.5%**	**16.8%**	**17.3%**
PAT	mn INR	3,704	3,367	3,067	10,268	8,683
PAT Margin	%	**12.3%**	**12.6%**	**13.0%**	**12.5%**	**12.9%**
Capex[2)]	mn INR	1,822	958	843	3,568	2,670
FCF	mn INR	408	965	2,232	2,742	7,471

[1)] EBITDA (before exceptional items) - Earning Before Interest, Tax, Depreciation and Amortization - interest income (net) at 252 mn INR in Q3'26 (209 mn INR in Q3'25) ; [2)] Capex includes CWIP
Note : Performance indicators on Standalone Financials

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Q3 2026 - Consolidated Financial Results

mn INR	Schaeffler India Limited Standalone (Q3 2026)	KRSV Innovative Auto Solutions Private Limited (Q3 2026)	Schaeffler India Limited Consolidated[1)] (Q3 2026)
Revenue	30,058	837	30,894
EBITDA (before exceptional)	18.7%	-17.6%	17.7%
EBIT (before exceptional)	15.7%	-19.4%	14.6%
EBT (before exceptional)	16.5%	-23.6%	15.4%

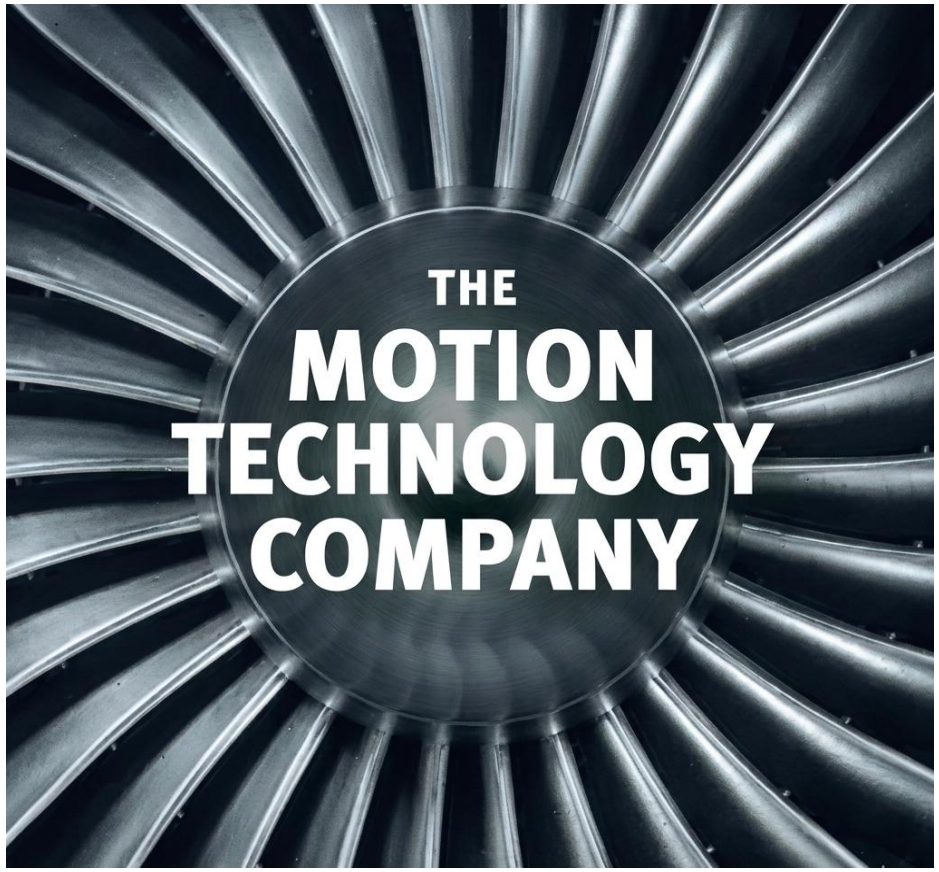
[1)] Consolidated results are net of consolidation effects

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In Summary



1. YoY double digit growth momentum across domestic and exports business
2. Earnings quality marginally impacted given increased input costs and continued adverse effects of fuel price
3. Working capital levels to remain in check. Capex framework remains on track
4. Committed to deliver results and drive long term stakeholder value

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