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Schaeffler India Limited

Investor Presentation

April 30, 2026

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Q1 2026 Awards and Accolades

Partner Level Excellence Award

from John Deere

Strategic Partner Award

from TVS Mobility

Innovation in Underframe Components & Engineering

at 7th Rail Analysis Innovation & Excellence Summit 2026

Outstanding Techno-Commercial Support

from Adani Power

Valued Supplier

from ELIN WG (a Voith company)

Partner's Level Award

from John Deere for 5th time in a row

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1 **Economy and Industry**

2 Business Highlights - Q1 2026

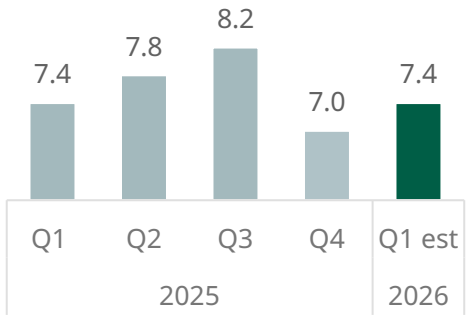
3 Financial Highlights - Q1 2026

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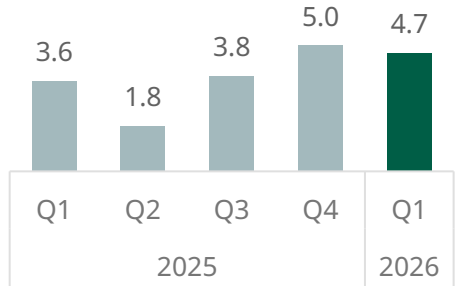
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Economy

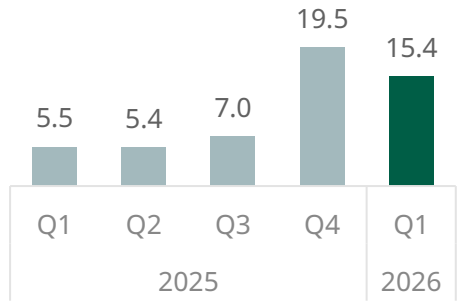
GDP [1) 3)]



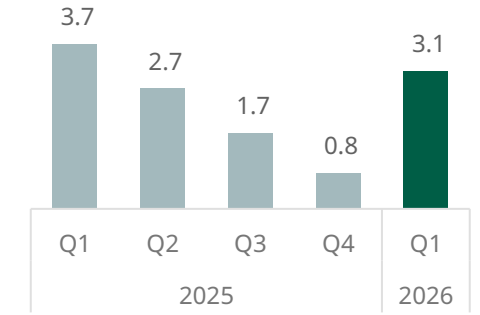
IIP [1) 3)]



Automotive Production [2) 4)]



CPI [1)]



Key messages

- GDP – GDP growth estimated at ~7.4%, sustained by resilient consumption, investment momentum, and export recovery.
- IIP – Growth subdued due to weak domestic demand and capex momentum.
- Automotive – Q1 YoY growth for CVs at 17.0% for PVs at 11.3% and for Tractors at 37.2%.
- CPI – Surge in CPI due to higher food prices and energy pressure reversing the disinflationary trend seen through late 2025.

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 March are 5.5%, 4.3% and 0.8% respectively.
- Automotive Production includes PVs, CVs, & Tractors with production share of 69%, 16% & 15% 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 Q1CY26 is based on estimates

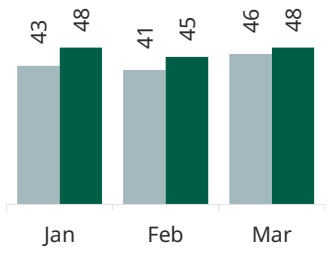
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Core Sector Performance

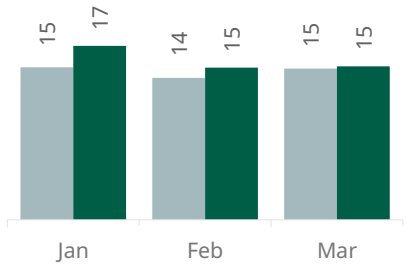
8.4%

Cement Production (mn tn)



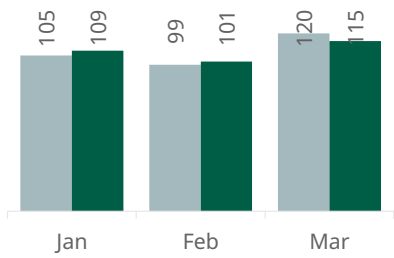
7.6%

Steel Production (mn tn)



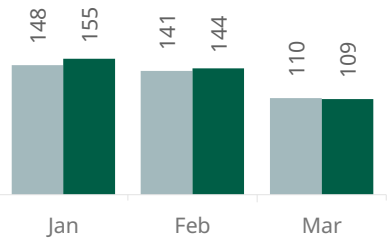
0.1%

Coal Production (mn tn)



2.29%

Electricity Generation (bn KwH)



Key aspects

- Core industry growth for Q4FY26 registered at 2.4% compared to 4.1% for the same period last year.
- Growth in cement and steel production supported by construction demand, infrastructure push, and steady rural housing activity.
- Coal production remained sluggish amid geopolitical instability, while electricity generation was tempered by seasonal factors and lower consumption trends.

Sector weightage within eight core sectors

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

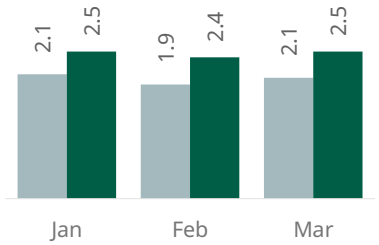
Source of Data: Core sectors data - Office of Economic Advisor

2025 2026 YTD CY2026 Growth

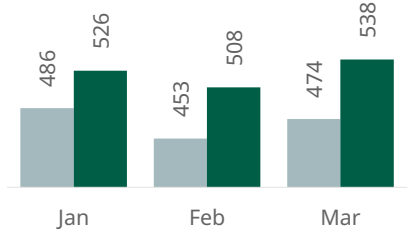
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Automotive Sector Performance

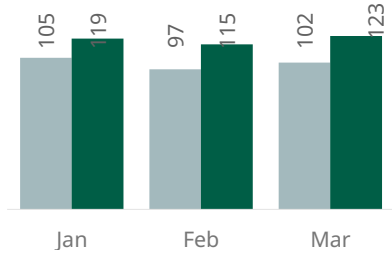
Two and three wheelers (mn units)[1)]



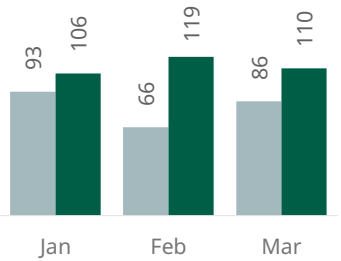
Passenger Vehicles (th units)[2)]



Commercial Vehicles (th units)[2)]



Agricultural Tractors (th units)[3)]



Key aspects

- Two and three wheelers – Growth driven by government incentive for electric vehicles and rise in urban mobility needs.
- PVs and CVs – Growth driven by infrastructure investments and evolving consumer preferences.
- Tractors - Growth driven by rising disposable income of farmers and continued focus on agricultural infrastructure.

Year to Date (YTD) Growth

Vehicle	YTD Growth
2W and 3W	21.0%
PVs	11.3%
CVs	17.0%
Tractors	37.2%

Source of data :
[1)] SIAM : Society of Indian Automobile Manufacturers
[2)] TMA : Tractor Manufacturers Association
[3)] 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 - Q1 2026**

3 Financial Highlights - Q1 2026

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Q1 2026 Performance

Key messages

1. YoY double digit growth momentum sustained in Automotive Technologies, Vehicle Lifetime Solutions and Exports
2. Earnings quality sustained due to localization benefits and capital efficiency
3. Successfully navigated margin headwinds on supply chain disruptions and inflationary pressures
4. Working capital levels sustained
5. Capex – moderate investments for the quarter, framework remains on track

Revenue
25,070
mn INR
18.8% vs Q1'25
-5.1% vs Q4'25

EBITDA
4,830
mn INR
19.3% Q1'26
19.1% Q4'25

PAT
3,197
mn INR
12.8% Q1'26
12.4% Q4'25

FCF
1,369
mn INR
-42.2% vs Q1'25
-46.1% vs Q4'25

EBITDA : Earning Before Interest, Tax and Depreciation (before exceptional item), FCF : Free Cashflow, PAT: Profit After Tax
Note Q1 2026 performance comments on Standalone Financials

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Business Developments

AUTOMOTIVE TECHNOLOGIES

Precision and Longevity

- New business wins in double clutches for tractors
- Continued momentum in heavy duty clutch and double clutch
- Business wins for hydraulic cam phaser



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 Housing , SRBs and Split SRBs, nominations for needle bearings for steering application
- Business wins for CRBs, TRBs, DGBBs for Raw Materials and Power Transmission sectors
- Business wins for DGBBs, NRBs in automotive bearings



SRBs -Spherical roller bearing, TRB - Tapered roller bearing,
CRB - Cylindrical roller bearing, DGBBs- Deep Groove Ball Bearing, FEAD- Front End Accessory Drive

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1 Economy and Industry

2 Business Highlights - Q1 2026

3 **Financial Highlights - Q1 2026**

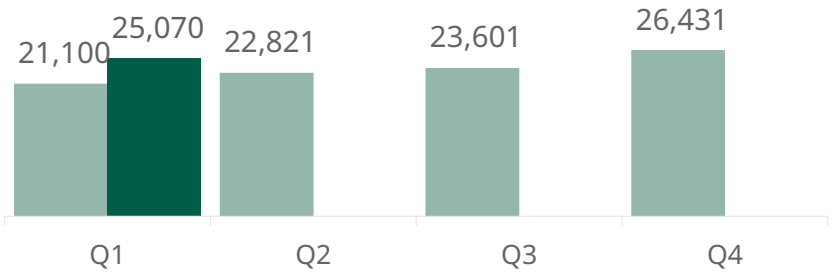
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Revenue from operations

Total revenue

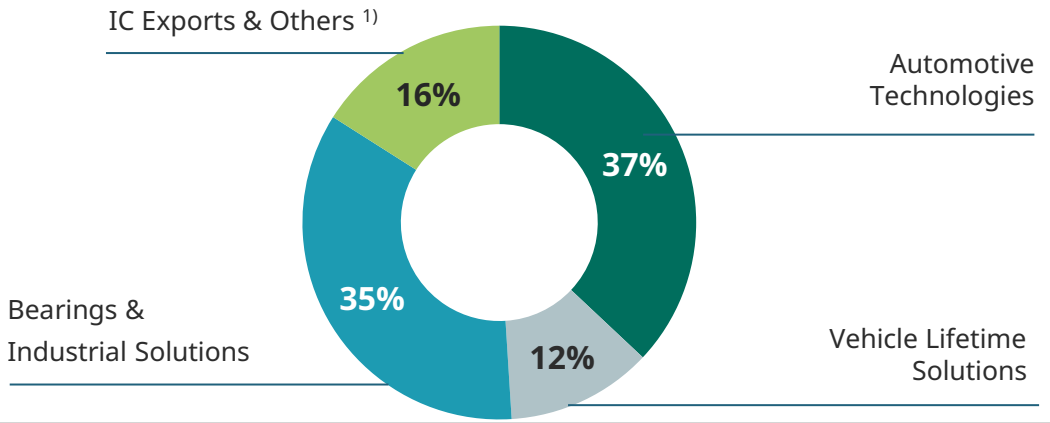
mn INR



	Q1	Q2	Q3	Q4
QoQ Growth	1.3%	-5.1%	8.2%	3.4%	12.0%
YoY Growth	14.1%	18.8%	10.1%	13.9%	26.9%

Sales Mix

Q1 2026



Growth	Q1'26 vs Q4'25	Q1'26 vs Q1'25
Automotive Technologies	-1.3%	30.8%
Vehicle Lifetime Solutions	-0.6%	18.1%
Bearings and Industrial Solutions	-14.3%	4.2%
Intercompany Exports & others	6.6%	32.5%

Key aspects

- YoY Double digit growth in Automotive Technologies and Vehicle Lifetime Solutions and Exports, domestic business up 16.4%
- QoQ trend impact due to ongoing geopolitical conflicts, domestic business down 7.2%

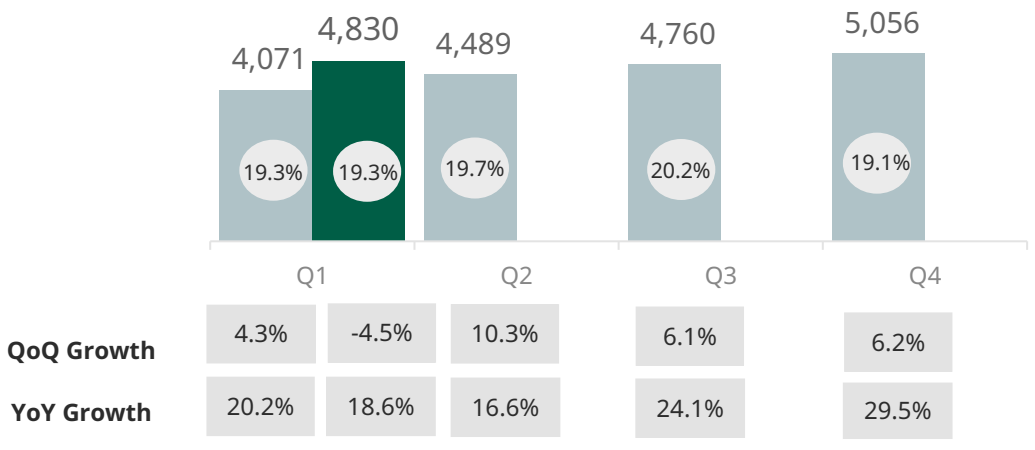
IC Exports – Intercompany Exports; 1) Exports mainly includes exports to group companies, scrap sale and other operating income
Note : Business highlights on Standalone Financials

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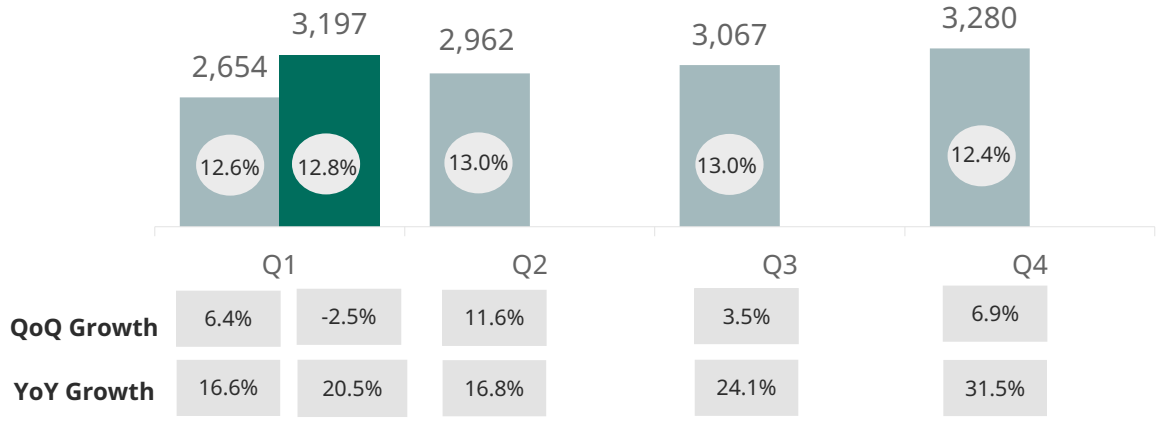
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Earnings Quality

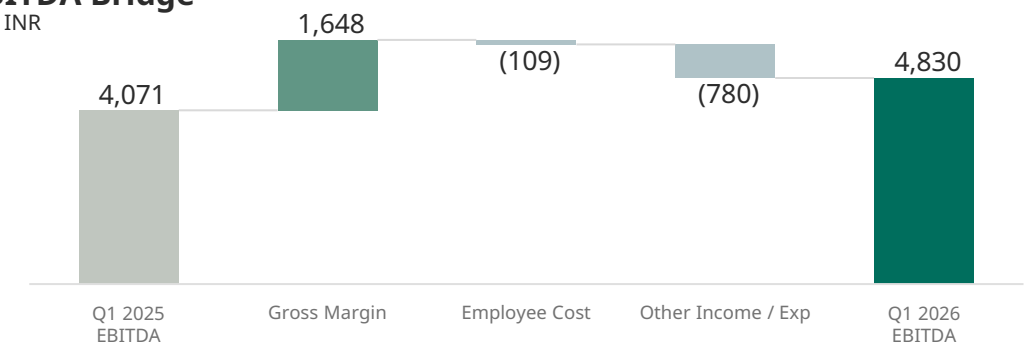
EBITDA
mn INR



PAT
mn INR



EBITDA Bridge
mn INR



Key aspects

- YoY margins headwinds offset by volume gains, localization benefits and capital efficiency
- QoQ margins consistent with compensating differences

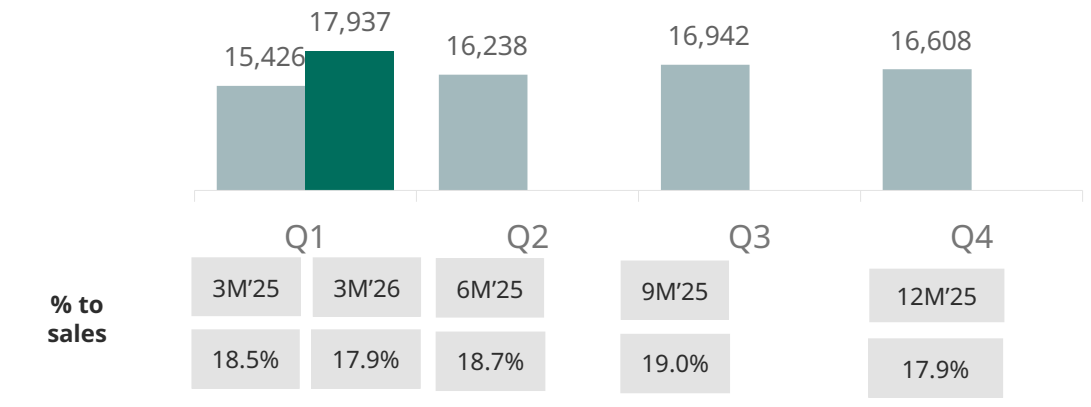
EBITDA (before exceptional items) – Earning Before Interest, Tax, Depreciation and Amortization) - interest income (net) at 295 mn INR in Q1"26 (279 mn INR Q1'25)
PAT: Profit After Tax
Note : Performance indicators on Standalone Financials

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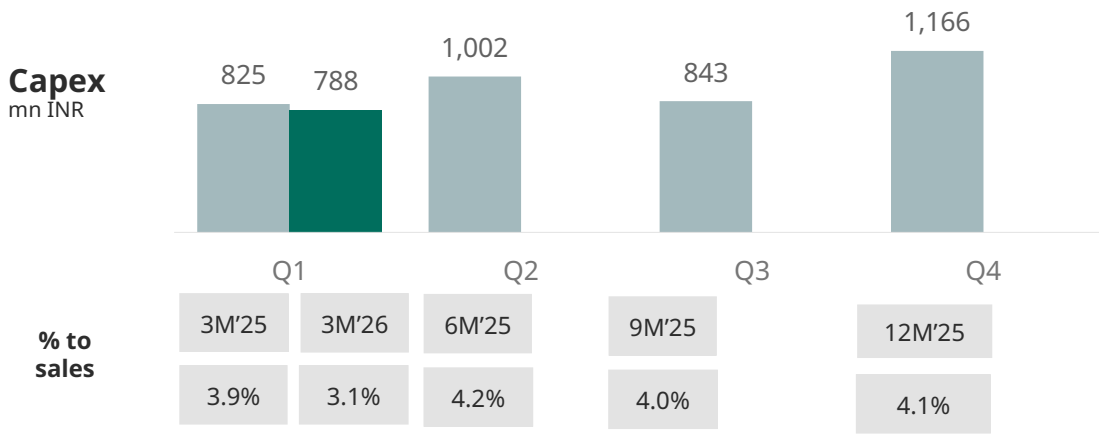
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Working Capital and Capex

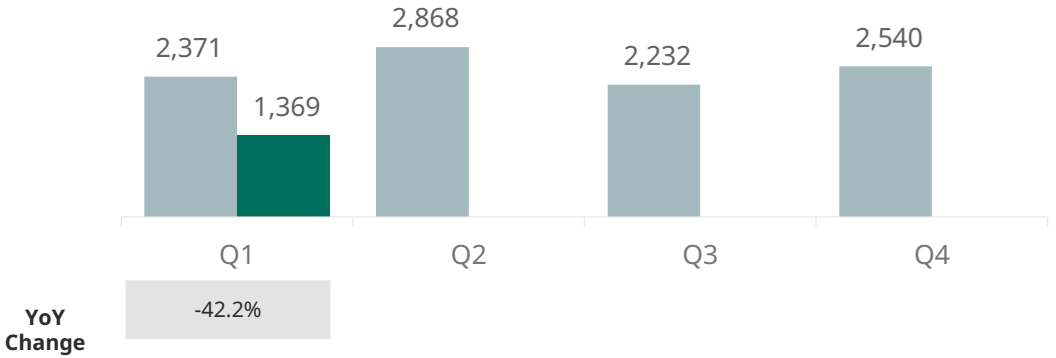
Working Capital
mn INR



Capex
mn INR



Free Cash Flow
mn INR



Key aspects

- Capex – moderate investments for the quarter, framework on track
- Free cash flow generation – adversely impacted by increase in absolute working capital to meet increasing demand in ATECH – working capital ratio remains in check

Note : Business highlights on Standalone Financials

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Performance Indicators

	Unit	Q1 2026	Q4 2025	Q1 2025	12M 2025
Revenue	mn INR	**25,070**	**26,431**	**21,100**	**93,953**
Revenue growth (YoY)	%	**18.8%**	**26.9%**	**14.1%**	**16.3%**
Revenue growth (QoQ)	%	-5.1%	12.0%	1.3%	-
EBITDA[1)]	mn INR	4,830	5,056	4,071	18,376
EBITDA Margin	%	**19.3%**	**19.1%**	**19.3%**	**19.6%**
EBIT	mn INR	3,962	4,173	3,278	15,088
EBIT Margin	%	**15.8%**	**15.8%**	**15.5%**	**16.1%**
EBT	mn INR	4,257	4,455	3,557	16,120
EBT Margin	%	**17.0%**	**16.9%**	**16.9%**	**17.2%**
PAT	mn INR	3,197	3,280	2,654	11,962
PAT Margin	%	**12.8%**	**12.4%**	**12.6%**	**12.7%**
Capex[2)]	mn INR	788	1,166	825	3,836
FCF	mn INR	1,369	2,540	2,371	10,010

[1)] EBITDA (before exceptional items) - Earning Before Interest, Tax, Depreciation and Amortization - interest income (net) at 295 mn INR in Q1"26 (279 mn INR Q1'25) ; [2)] Capex includes CWIP
Note : Performance indicators on Standalone Financials

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Q1 2026 - Consolidated Financial Results

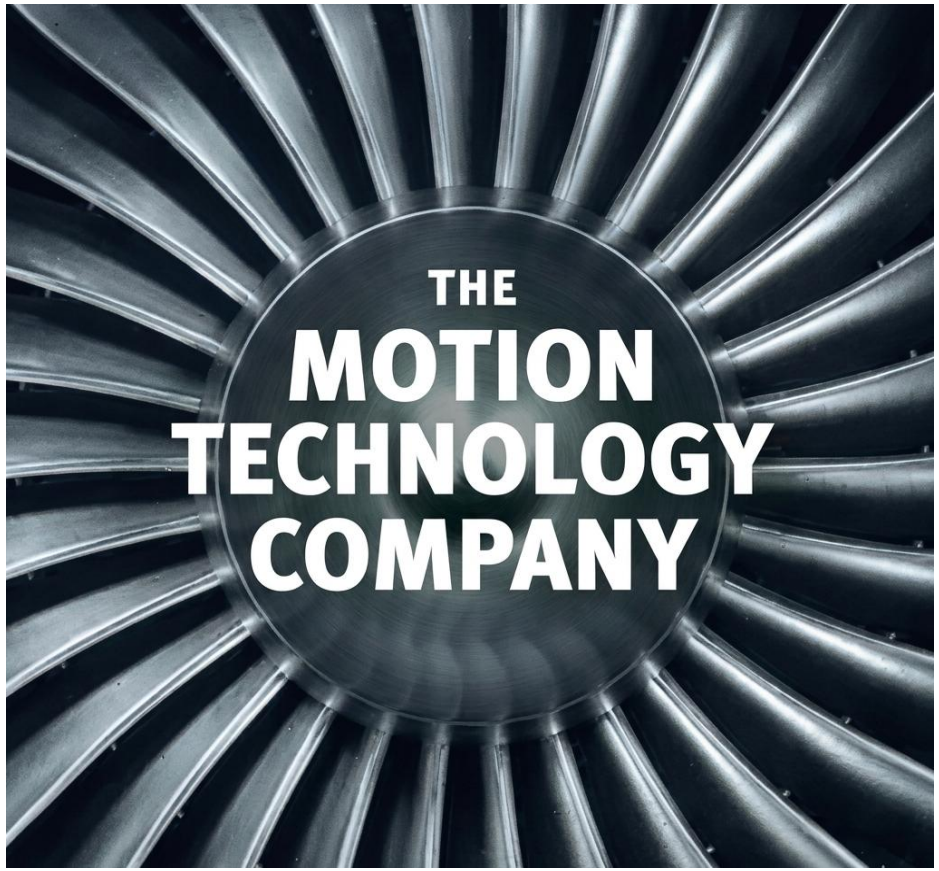
Particulars (mn INR)	Schaeffler India Limited Standalone (Q1 2026)	KRSV Innovative Auto Solutions Private Limited (Q1 2026)	Schaeffler India Limited Consolidated[1] (Q1 2026)
Revenue	25,070	787	25,856
EBITDA (before exceptional)	19.3%	-13.4%	19.1%
EBIT (before exceptional)	15.8%	-15.1%	15.6%
EBT (before exceptional)	17.0%	-19.0%	16.6%

[1] Consolidated results are net of consolidation effects

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In Summary



1. YoY double digit growth momentum sustained in Automotive Technologies, Vehicle Lifetime Solutions and Exports
2. Earnings quality sustained due to localization benefits and capital efficiency
3. Working capital levels sustained. Capex framework remains on track
4. Committed to deliver results and drive long term stakeholder value

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