



— DRIVING THE NEW —

INVESTOR PRESENTATION
Q1 FY'25

August 7, 2024



SAFE HARBOR

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INDUSTRY HIGHLIGHTS FOR Q1 FY25

Auto Industry growth momentum continues led by recovery in 2W

Recovery in 2W market with improved rural sentiment registering 20% YoY growth during the quarter.

PV segment registering 6% YoY growth with SUV saw a strong demand

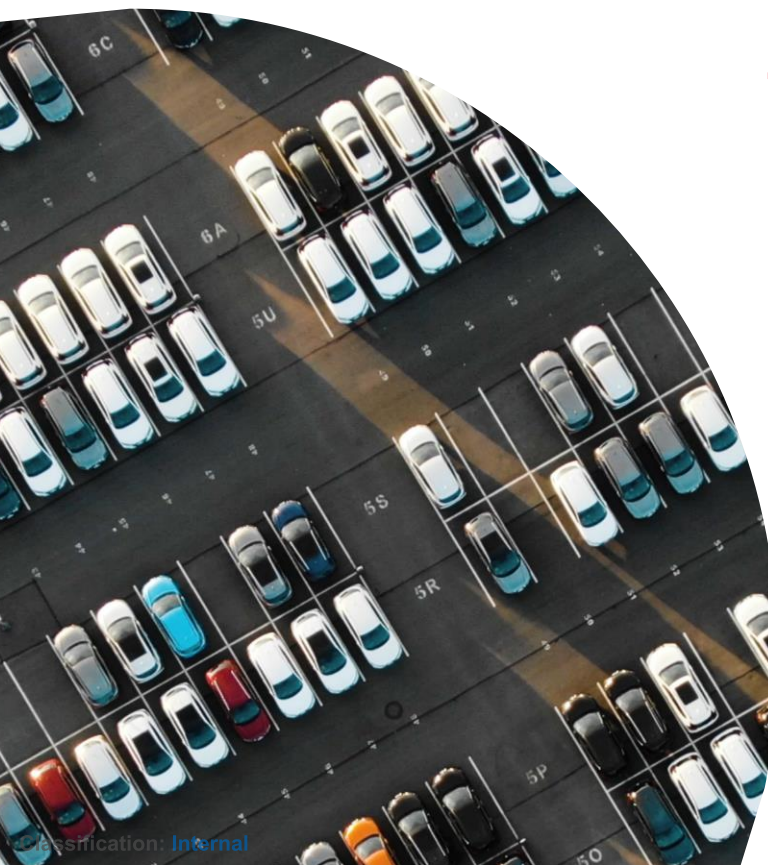
e-2W Registration decline impacted by subsidy reduction

e-2W registration for the quarter down by 20% Y-o-Y basis and 40% Q-o-Q basis.

FAME-2 Scheme ended on 31 March 2024 while EMPS 2024 reduced subsidy by half.

Electric Mobility Promotion Scheme 2024 extended by two months

The scheme's outlay has been enhanced to Rs. 778 crore from Rs 500 crore



KEY OPERATIONAL HIGHLIGHTS FOR Q1 FY25

Strengthening e4W specific portfolio with TLA with Inovance

Entered into Technical License Agreement with Inovance to manufacture and sale of Charging Control Unit (CCU), EV inverter, EV motors and next-generation 3-in-1 electric drive systems (e-Axle).

Foray into Vehicle Sunroof with AISIN Corporation

TLA with Aisin Corporation, Japan to manufacture and sale of sunroofs in India
AISIN ranked top 10 global tier 1 automotive supplier, holds largest market share in Sunroof in Japan

Increasing stake in Minda Onkyo to 99%

Board approved increasing stake in Minda Onkyo from 50% to 99% buy acquiring 49% from Onkyo in phases.





FINANCIAL INFORMATION & RECENT UPDATES

KEY FINANCIAL HIGHLIGHTS FOR THE QUARTER

Group Revenues (Including JVs and Associates) (Unaudited) higher by 24% Y-o-Y

Rs 4,600 Cr
for the quarter



Consolidated Revenues increased by 23% Y-o-Y to

Rs 3,818 Cr
for the quarter



EBITDA higher by 24% Y-o-Y to

Rs 408 Cr
for the quarter



EBITDA margin at 10.7%
for the quarter



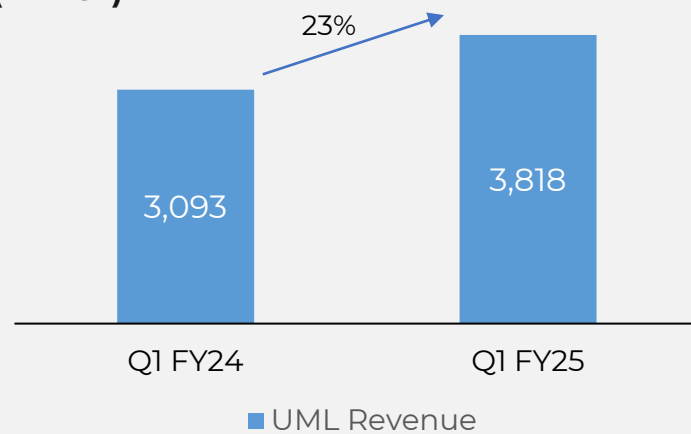
PAT (UML share excluding exceptional Income) increased by 15% on Y-o-Y to

Rs 199 Cr
for the quarter

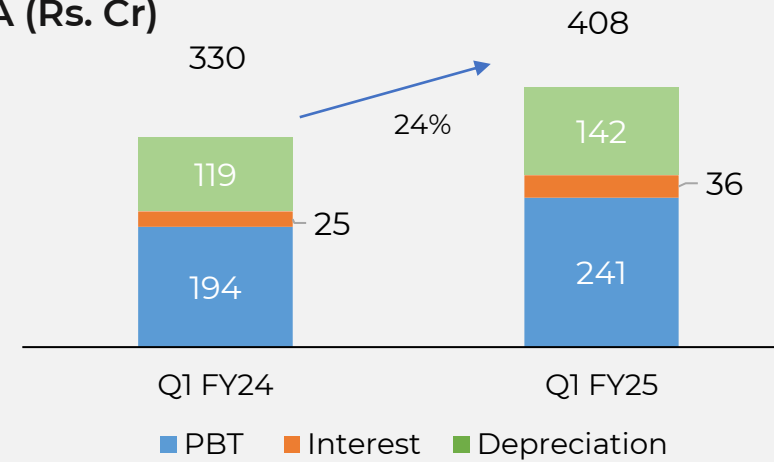


CONSOLIDATED FINANCIAL HIGHLIGHTS – Q1 FY25

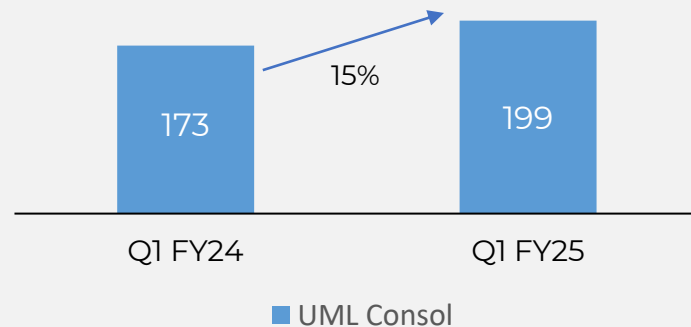
Revenue (Rs. Cr)



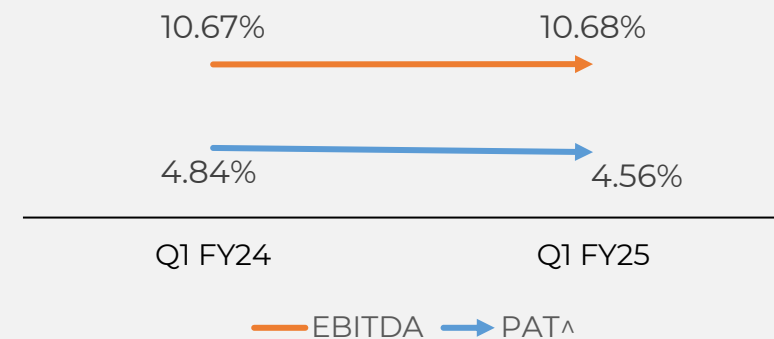
EBITDA (Rs. Cr)



PAT* (Rs. Cr)



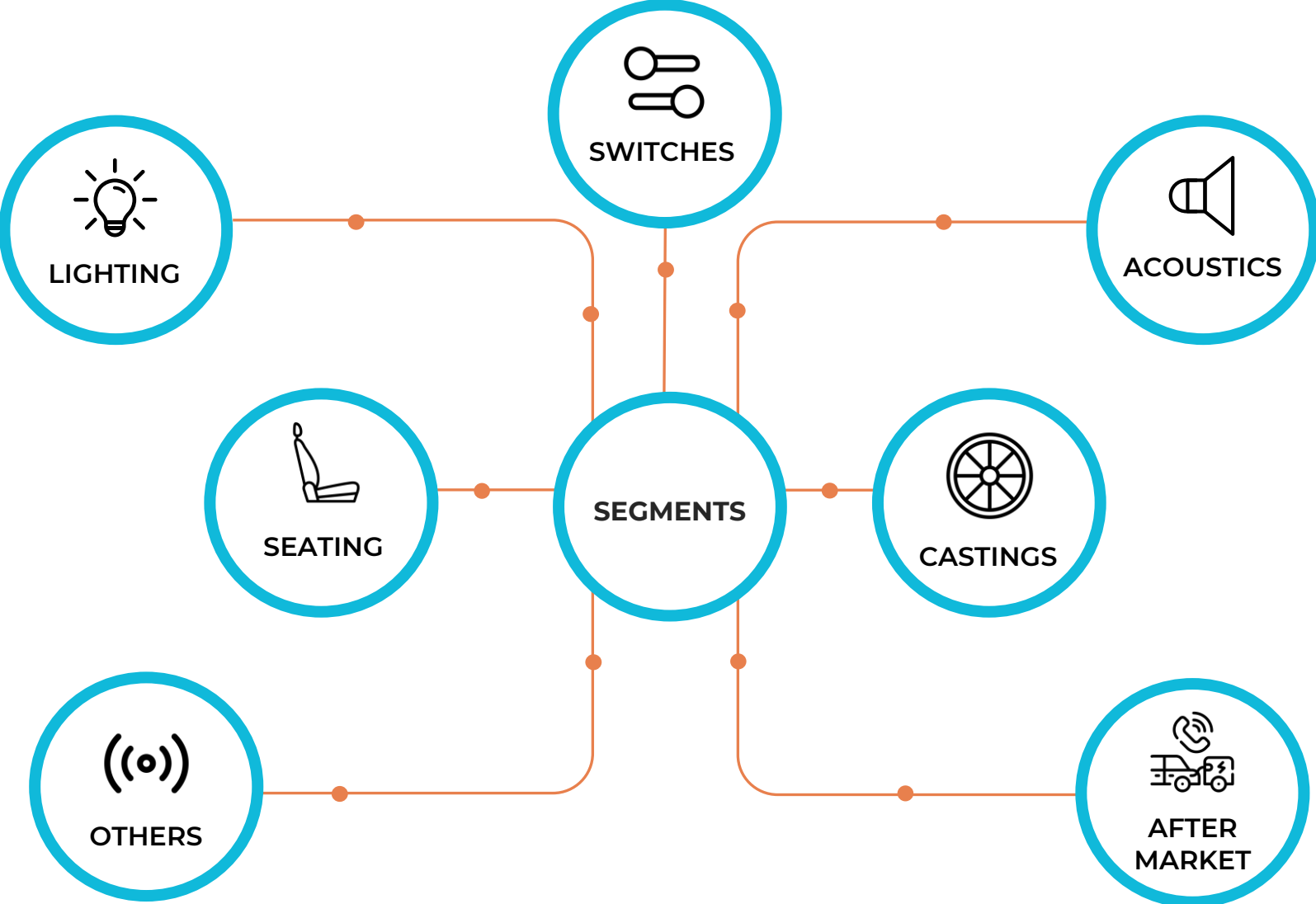
Margin (%)



*PAT UML Share (Excluding Exceptional Income)

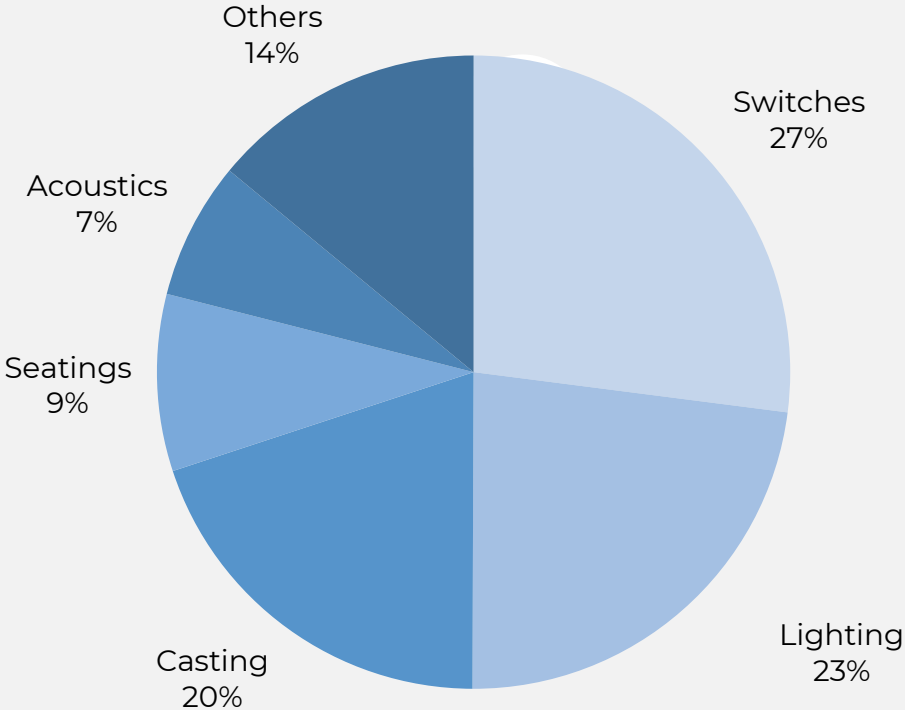
^ PAT before profit share of JVs/ & Associates

BUSINESS REVIEW

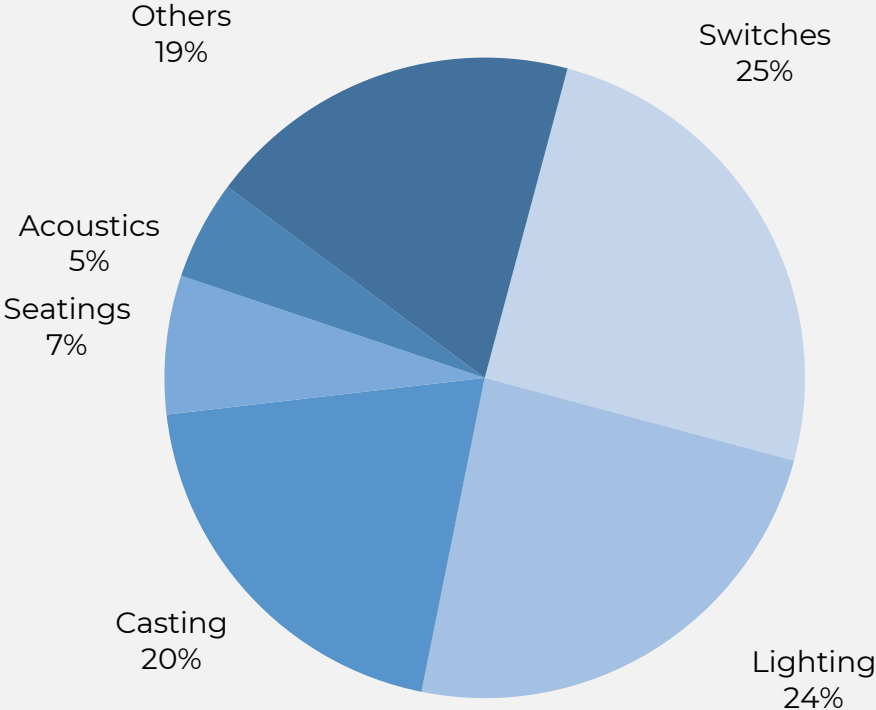


DIVISION-WISE REVENUE MIX


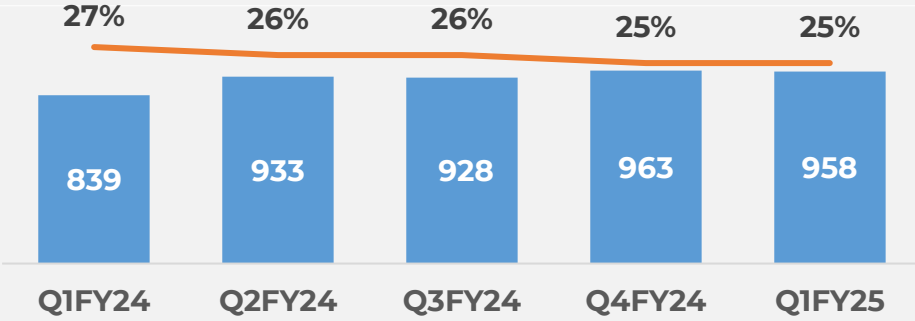

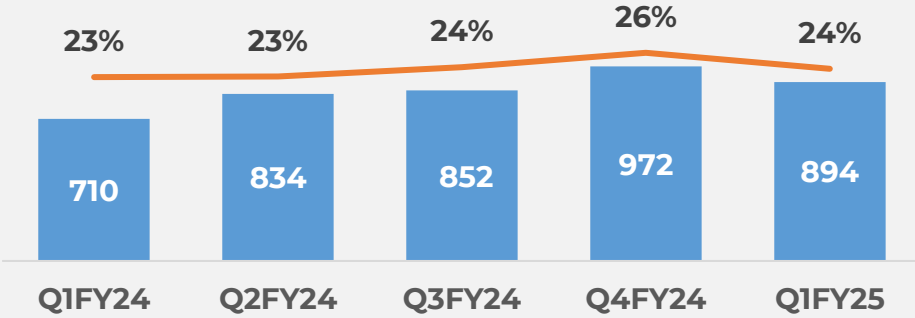

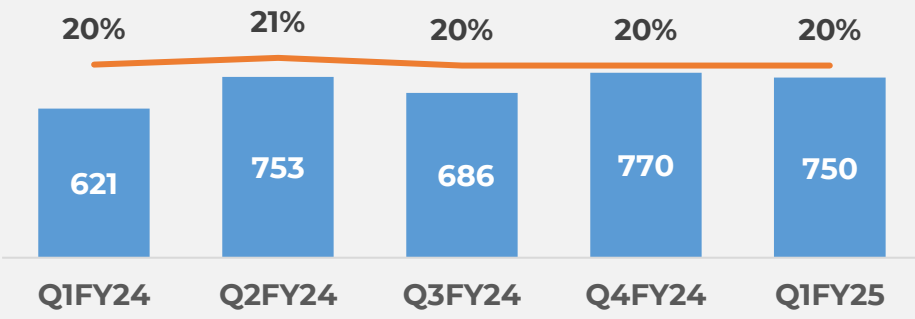
Q1 FY24 (%)



Q1 FY25 (%)

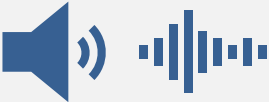
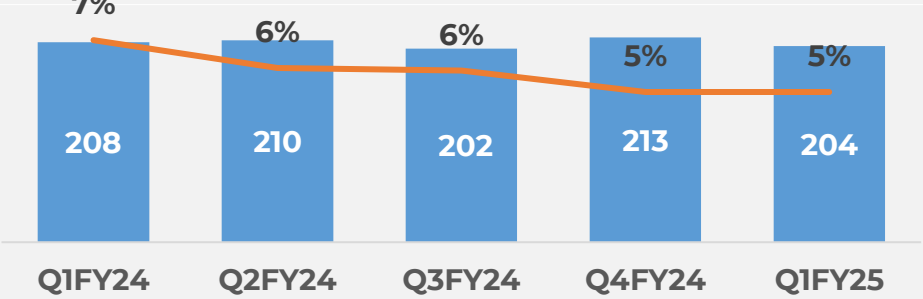

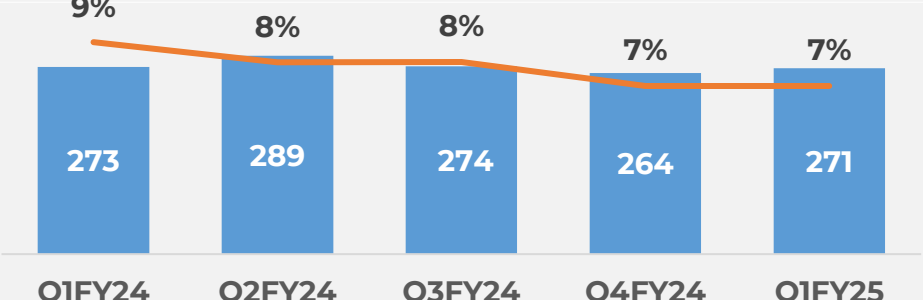

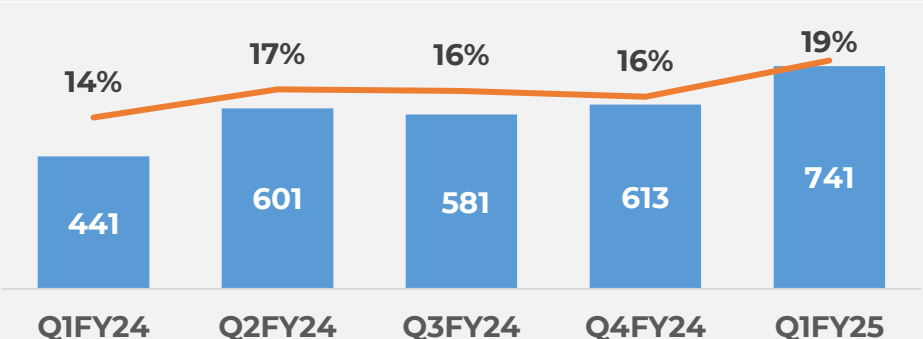


BUSINESS REVIEW

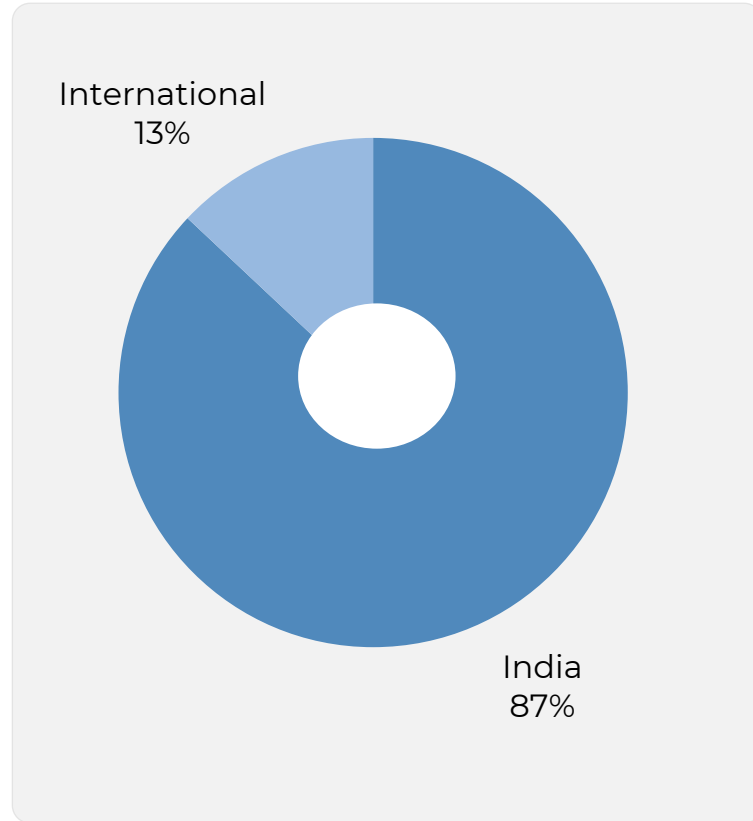
Product Segment	Revenue Growth (Figures in Rs. Cr)	Key updates																		
 Switches	 <table border="1"> <thead> <tr> <th>Quarter</th> <th>Revenue (Rs. Cr)</th> <th>Revenue Share (%)</th> </tr> </thead> <tbody> <tr> <td>Q1FY24</td> <td>839</td> <td>27%</td> </tr> <tr> <td>Q2FY24</td> <td>933</td> <td>26%</td> </tr> <tr> <td>Q3FY24</td> <td>928</td> <td>26%</td> </tr> <tr> <td>Q4FY24</td> <td>963</td> <td>25%</td> </tr> <tr> <td>Q1FY25</td> <td>958</td> <td>25%</td> </tr> </tbody> </table>	Quarter	Revenue (Rs. Cr)	Revenue Share (%)	Q1FY24	839	27%	Q2FY24	933	26%	Q3FY24	928	26%	Q4FY24	963	25%	Q1FY25	958	25%	<ul style="list-style-type: none"> Export of 2W switch continues to grow. Crosses Rs 50 Crores in first quarter
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■ Revenue — Revenue Share

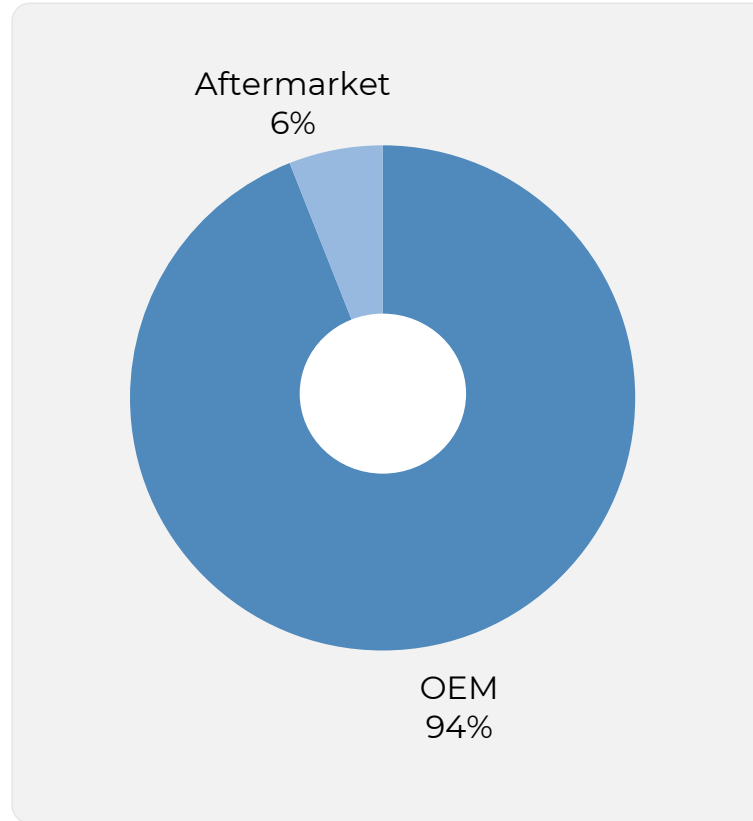
BUSINESS REVIEW

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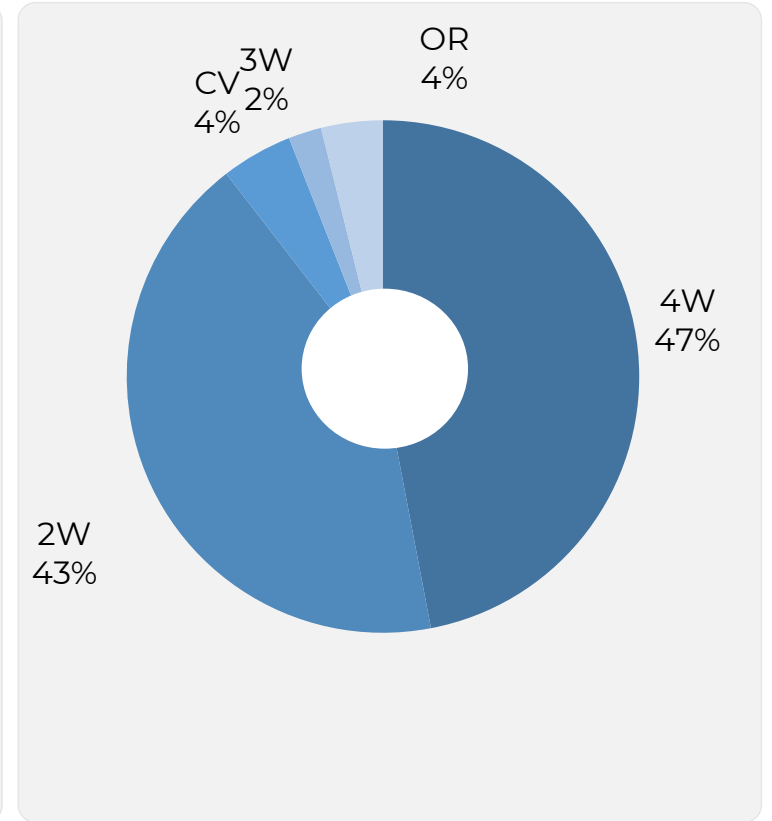
REVENUE BREAKUPS Q1 FY25



Geography-wise Breakup



Channel-wise Breakup



Segment-wise Breakup

AFTERMARKET- EXPANDING B2C BUSINESS

Key Highlights

- Revenue of Rs. 235 Cr during the quarter
- Leadership position in major products categories
- Strong brand recall with loyal customer base
- Continuous expansion of existing Product portfolio & addition of new product lines- Alloys, Infotainment, Seating, Air Braking etc.

6,500+ SKUs

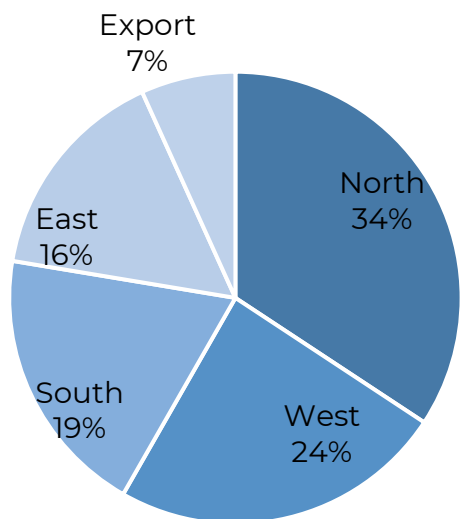
Switches, Horns, Lightings, Batteries, Filter, Indicator, Bulbs, RVMs, Braking, Shocks & struts and Accessories

150,000+

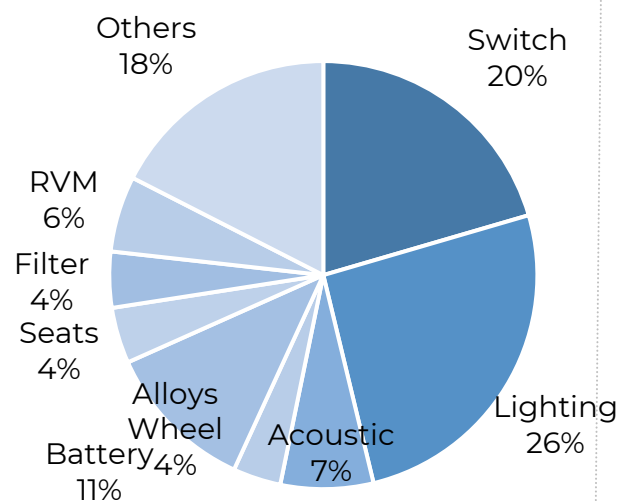
Workshops

6 Export Regions

Exporting to SAARC, ASEAN, EU, LATAM, MENA & Africa

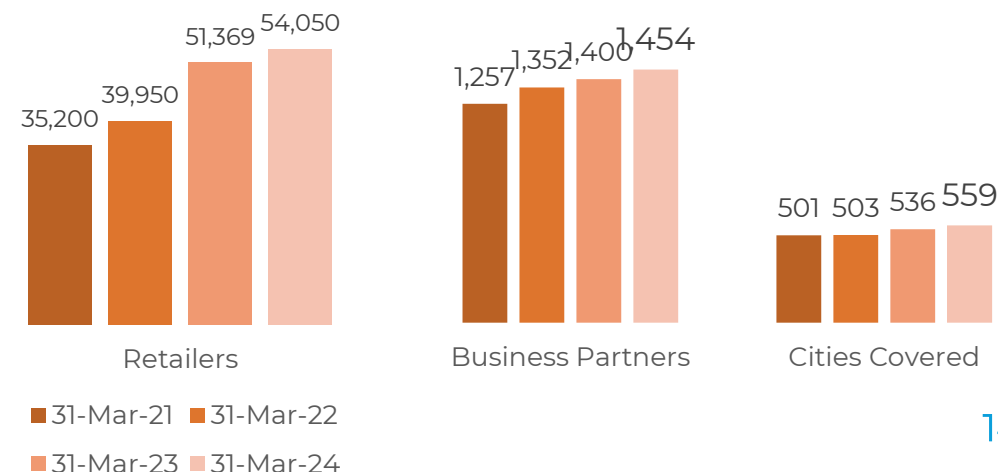


Geographical Breakup



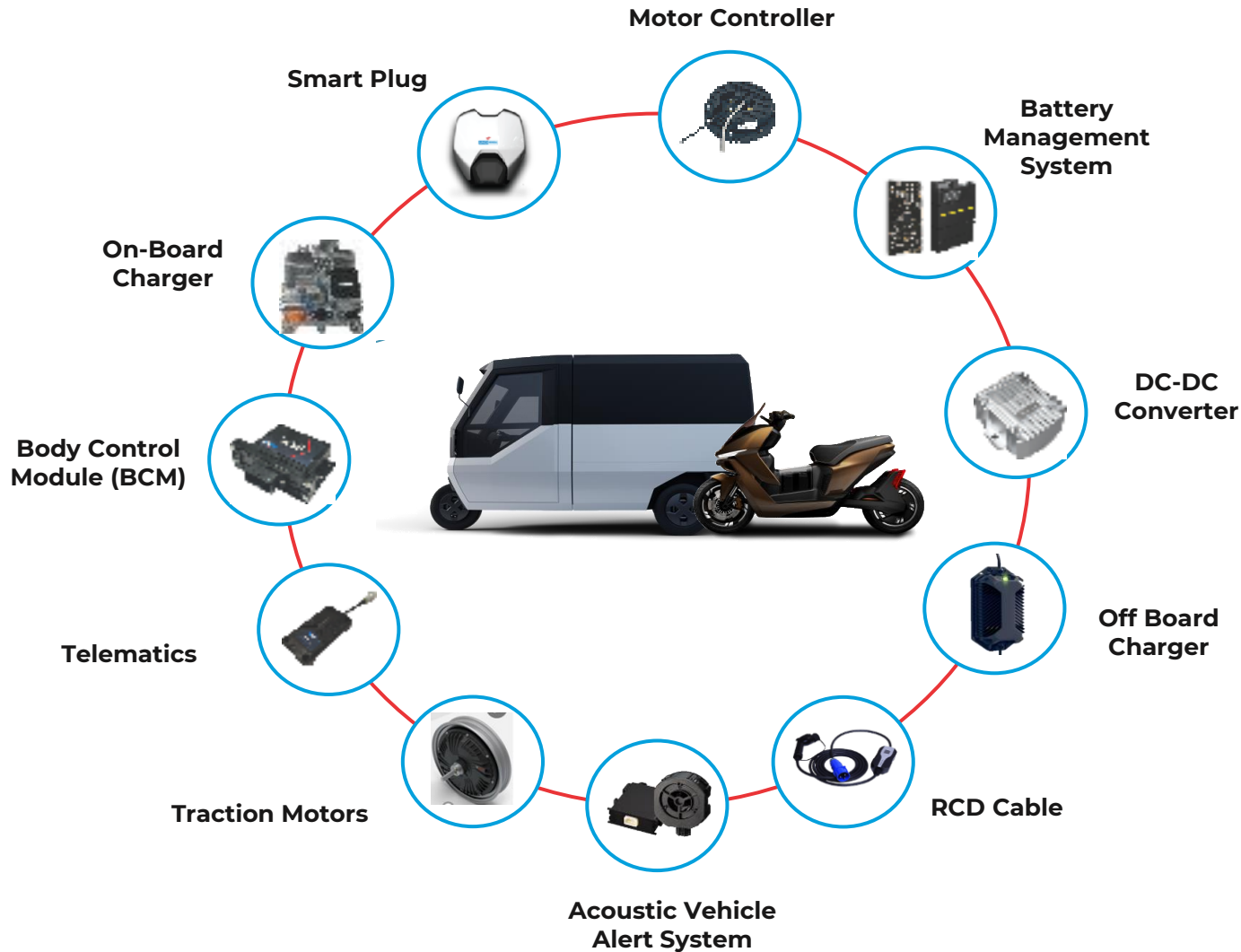
Parts Breakup

Expanding Network

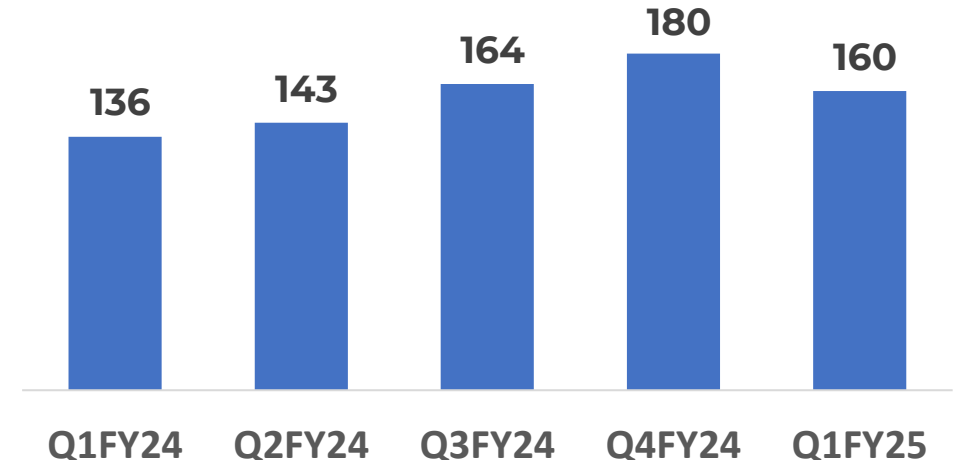


UNO MINDA's EV PRODUCT PORTFOLIO (2W & 3W)

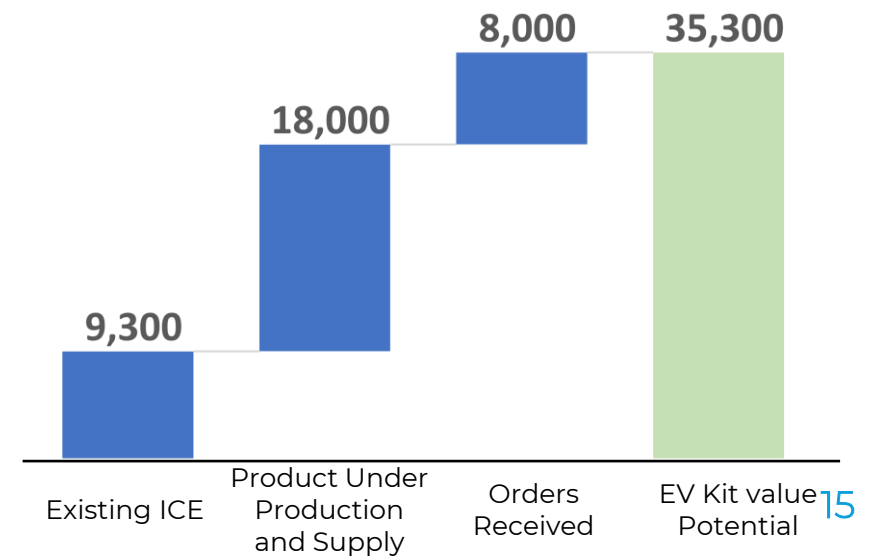
Low Voltage EV Products (48V to 96V)



Sales to 2W Electric Vehicles Rs Crores

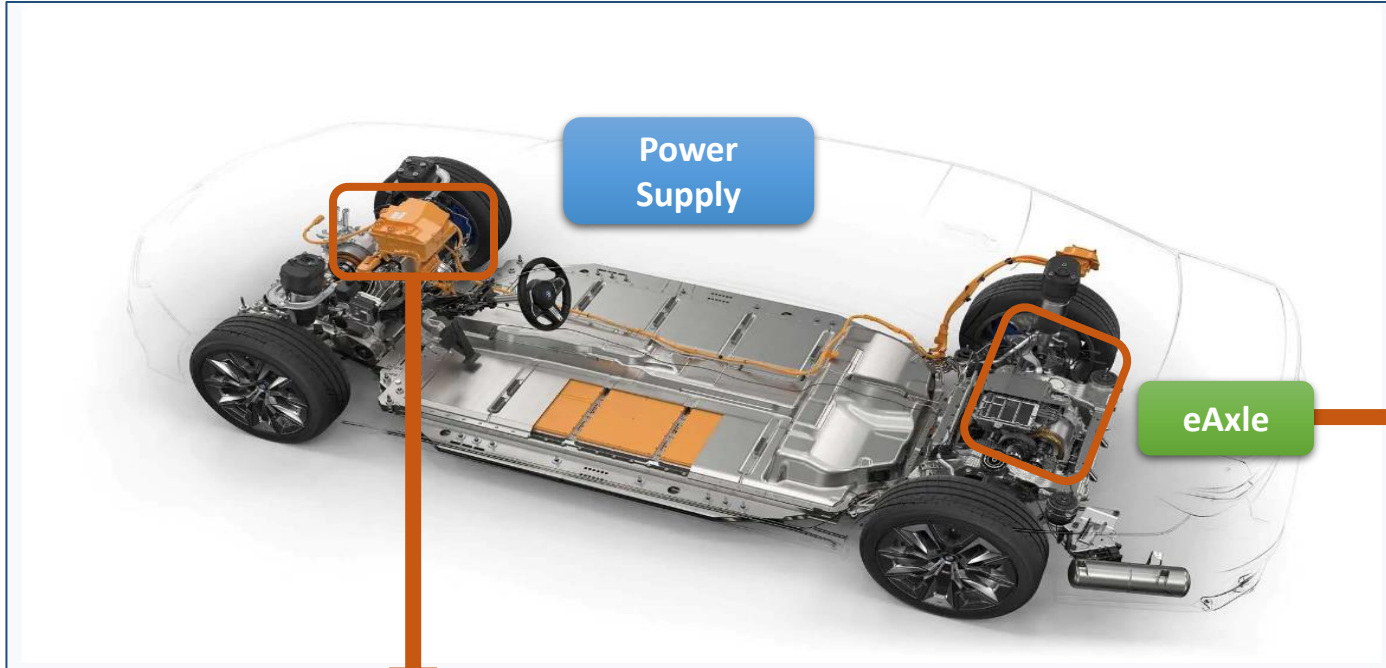


Potential Kit Value (in INR)



Product Portfolio under Inovance TLA

INOVANCE Automotive



60-90kW eAxle E-motor + Inverter + (Reducer)



100-140kW eAxle E-motor + Inverter + Reducer



150-200kW eAxle E-motor + Inverter + Reducer



6.6kW OBC + 3kW DCDC +PDU



11kW OBC + 3kW DCDC +PDU



6.6kW OBC + 3kW DCDC



5 in 1 CV Integrated Controller



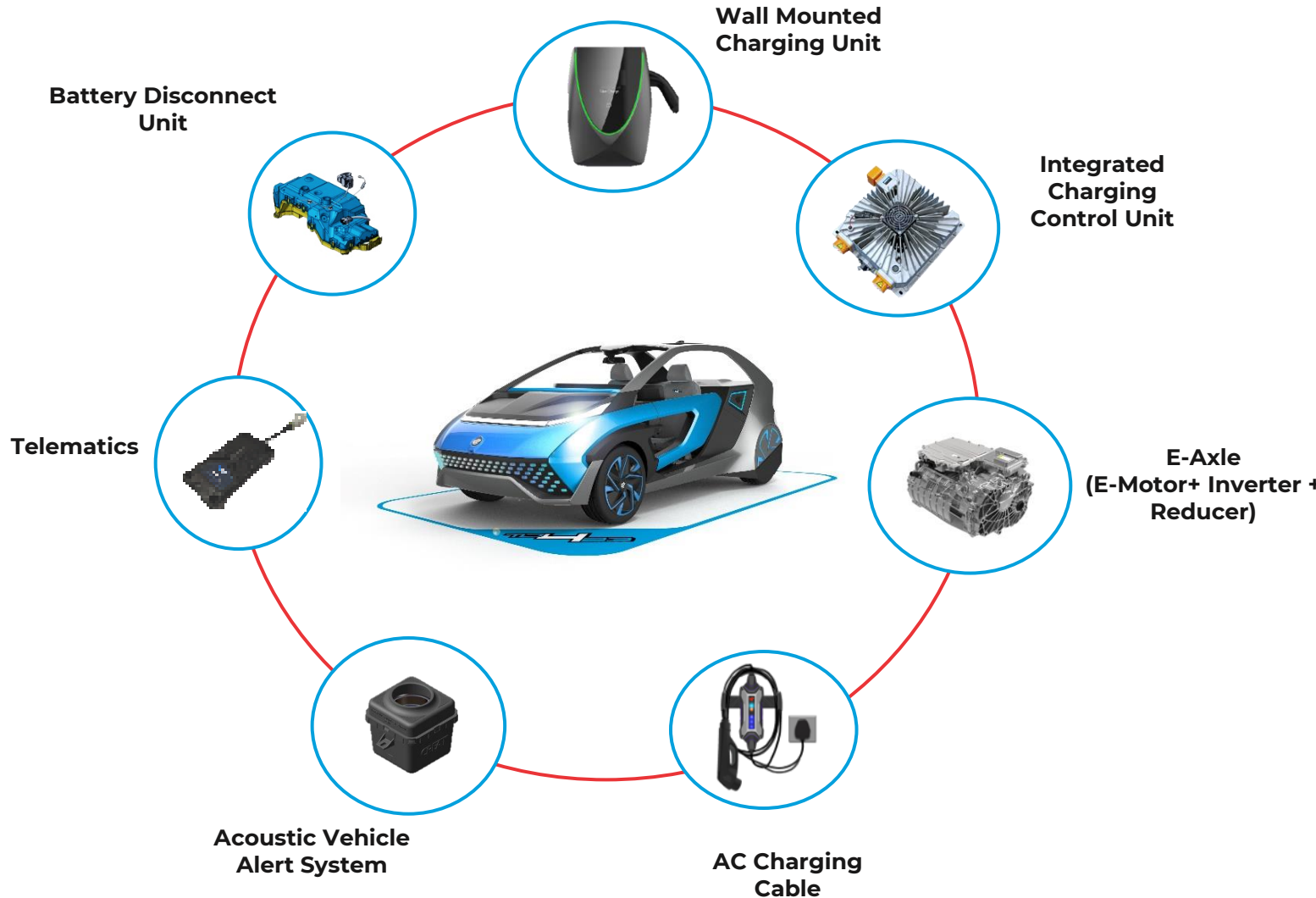
Inovance a leading provider of intelligent components and systems for electric and hybrid vehicles & supplies to many of the leading Chinese and Global PV and CV OEMs

~ USD 4.2 billion in revenue in FY23

TLA for Charging Control Unit (CCU), EV inverter, EV motors and next-generation 3-in-1 electric drive systems (e-Axle)

Partnership significantly expand Uno Minda's e-4W product portfolio

EV Strategy for Four Wheeler



Under Production/Orders Won

- 1 Battery Disconnect Unit
- 2 AC Charging Cable
- 3 Integrated Charging Control Unit (OBC + DC DC + PDU) (Low Voltage)

Under Self Development/TLA Done

- 4 EVSE-Wall Mount Charging Unit
- 5 Acoustic Vehicle Alert System
- 6 Telematics
- 7 Integrated Charging Control Unit (OBC + DC DC + PDU) (High Voltage)
- 8 Electric Drive Unit (EDU)/e-Axle (E-Motor+ Inverter+ Reducer)

Vehicle Sunroof with AISIN

AISIN

Conventional Sunroof



Panoramic Sunroof



TLA with AISIN for Sunroof

- ❖ Sunroof penetration has witnessed manyfold jump in last few years presenting a compelling market opportunity
- ❖ TLA with Aisin Corporation, Japan to manufacture and sale of vehicle sunroofs in India
- ❖ Combining expertise and production capabilities to establish ourselves as a frontrunner in the burgeoning sunroof market.
- ❖ Secured order from one of the OEM with expected SOP in Q4 FY27
- ❖ To Set up new plant at Bawal for manufacturing vehicle sunroof with capex of Rs 62.50 Crores

AISIN Group provides automotive components and systems through a global network spanning 20 countries

Ranked as a Top 10 Global Tier-1 Automotive Supplier

Over 200 Aisin Group Companies generating 4,910 Bn JPY revenue FY 24

Project Expansion Update

Sr	Product Line	Entity	Total Cost (In Crs)	Location	Capacity	Expected SOP	Update
1	4W Alloy Wheels	Uno Minda Ltd	542	Kharkhoda	120k Wheel p.m.	Q2 FY26 Phase 1	Project announced To be spend over 5 years
2	4W Alloy Wheels	Minda Kosei Aluminum (MKA)	190	Bawal	60k Wheels p.m.	Q3 FY25 Phase 1	Land Acquisition Delays 30K to start in Q3 FY25
3	2W Alloy Wheels	Uno Minda Ltd	300	Supa	2 Mn wheel pa	Q1 FY26	Project announced
4	4W Lighting	Uno Minda Ltd	400 (Phase I – 230 Cr)	Pune	New Lighting Facility	Q3 FY25 Phase 1	Land Acquisition completed. Construction started To be spend over 5 years
5	4W Switches	Uno Mindarika	110	Gurugram	New Switch Facility	Q3 FY25	Subpart Manufacturing to Start from Q3 FY25
6	EV Specific	Uno Minda Buehler Motor	110	Bawal	Traction Motor Production Facility	Q4 FY 24	Phase 1 Commenced To be spend over 5 years
7	EV Specific	UnoMinda EV Systems	390	Gurugram	New facility for EV specific products	Q2 FY24 Phase I	Phase 1 Commenced To be spend over 6 years
8	Airbags	TG Minda (JV)	175	Neemrana Rajasthan	1.2 Mn unit p.a.	Q3 FY25	Construction under progress
9	Seat Belts & Smart Systems	Tokai Rika Minda (JV)	200	Neemrana Rajasthan	New facility	Q2 FY26	Construction under progress
10	Sunroof	Uno Minda Ltd	63	Bawal Haryana	New Facility	Q4 FY27	Project Announced



ANNEXURES



CONSOLIDATED PROFIT & LOSS STATEMENT

Particulars (Rs. Cr)	Q1 FY25	Q1 FY24	YoY%	Q4 FY24	QoQ%	FY24	FY23	YoY%
Revenue from Operations (Net of Excise)	3,818	3,093	23%	3,794	1%	14,031	11,236	25%
Raw Material	2,460	1,987		2,410		9,064	7,224	
Employee Cost	516	424		452		1,779	1,460	
Other Expenses	433	352		459		1,603	1,310	
EBITDA	408	330	24%	474	-14%	1,585	1,242	28%
EBITDA Margin	10.68%	10.67%	1 bps	12.5%	-181 bps	11.3%	11.1%	25 bps
Other Income	11	8		9		34	49	
Depreciation	142	119		149		526	430	
EBIT	277	219	27%	334	-17%	1,093	861	27%
EBIT Margin	7.3%	7.1%	18 bps	8.8%	-154 bps	7.8%	7.7%	13 bps
Finance Cost	36	25		32		113	70	
Exceptional Profit/(Loss)				27		27		
Profit before Share of Profit/Loss of JVs and Tax	241	194	24%	329	-27%	1,006	791	27%
PBT Margin	6.3%	6.3%	4 bps	8.7%	-235 bps	7.2%	7.0%	13 bps
Tax	67	44		85		267	191	
Profit before Share of Profit/Loss of JVs	174	150	16%	244	-29%	739	600	23%
PAT Margin %	4.56%	4.84%	-28 bps	6.4%	-186 bps	5.3%	5.3%	-7 bps
Share of Profit/Loss of JVs	37	30		58		185	100	
Net profit/(loss) after share of profit/(loss) of associates / JVs (A)	211	180	17%	302	-30%	925	700	32%
PAT attributable to:								
- Owners of MIL	199	173	15%	289	-31%	880	654	35%
- Non Controlling Interests	12	7		13		44	47	
Earnings Per Share (Diluted)	3.46	3.00	15%	5.03	-31%	15.34	11.37	35%

ABOUT UNO MINDA



ABOUT UNO MINDA

UNO MINDA

A Leading Auto Component & Systems Player,
Since 1958

₹ **169B** (\$ 2.03 B)*

*Group Turnover (FY23-24)

TOP 200

BSE/NSE listed companies

74

Plants Globally

20

JV / TLA

32,000+

Employees

26

Product Lines

VISION

To be a **Sustainable Global** organization that **enhances** value for all its **Stakeholders**, attains **Technology Leadership** and cares for its people like a **Family**.

VALUES



Customer is Supreme



Live Quality



Respect for Individual



Respect for
Work-place Ethics



Encourage Creativity and Innovation to drive people, process & products



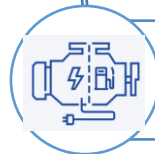
Uno Minda Limited is one of the leading manufacturers of auto components and systems with leadership across key product segments.



The company has a well diversified product portfolio with marquee clientele, both globally and domestically



Diversified across product divisions (Acoustics, Switches, Castings, Lighting and others), segments (4Ws & 2Ws) and geographies (International & Domestic) and channels (replacement & OEM)



Product portfolio is well insulated from any foreseeable market disruptions, with an ICE-EV agnostic product portfolio and constantly increasing kit value, leading to higher wallet share with OEMs



The company has been steadily growing its global presence through sustained capacity additions and channel expansions



Strong R&D focus and infrastructure helps in in-house product development and localization of products



Track record of robust financial performance and delivering strong shareholder returns, supported by reputed promoters with rich experience and backed by professional management team

Domains & Product Groups



Engine agnostic portfolio with potential upside from EV transition



Domains	Product Lines	ICE	EV
Electronic & Control Systems	4W Switches & HVAC	✓	✓
	Charging Sockets	✓	✓
	Sensors	✓	✓
	Actuators	✓	✓
	Controllers	✓	✓
	Seat Belts	✓	✓
	Shifters	✓	✓
	Infotainment Systems	✓	✓
	Cameras	✓	✓
	Telematics & TCU	✓	✓
	RPAS & ADAS	✓	✓
Safety & Comfort Systems	Steering Wheel with Airbags	✓	✓
	Body Sealing	✓	✓
	EA Pad	✓	✓
	Air Ducts & Washer Bottle	✓	✓
	Spoiler	✓	✓
	Brake Hoses	✓	✓
	Fuel/Water Hoses	✓	✓
	Seats	✓	✓
Lighting & Acoustics	Alternate Fuel Systems	✓	X
	Horns	✓	✓
	Lamps	✓	✓
	Speakers	✓	✓
Light Metal & Power Train	Alloy Wheels	✓	✓
	Casting	✓	✓
	Air Filtration Systems	✓	X
	Canisters	✓	X
Battery	Batteries - Lead Acid	✓	✓

GLOBAL PRESENCE



Strategic Manufacturing Location

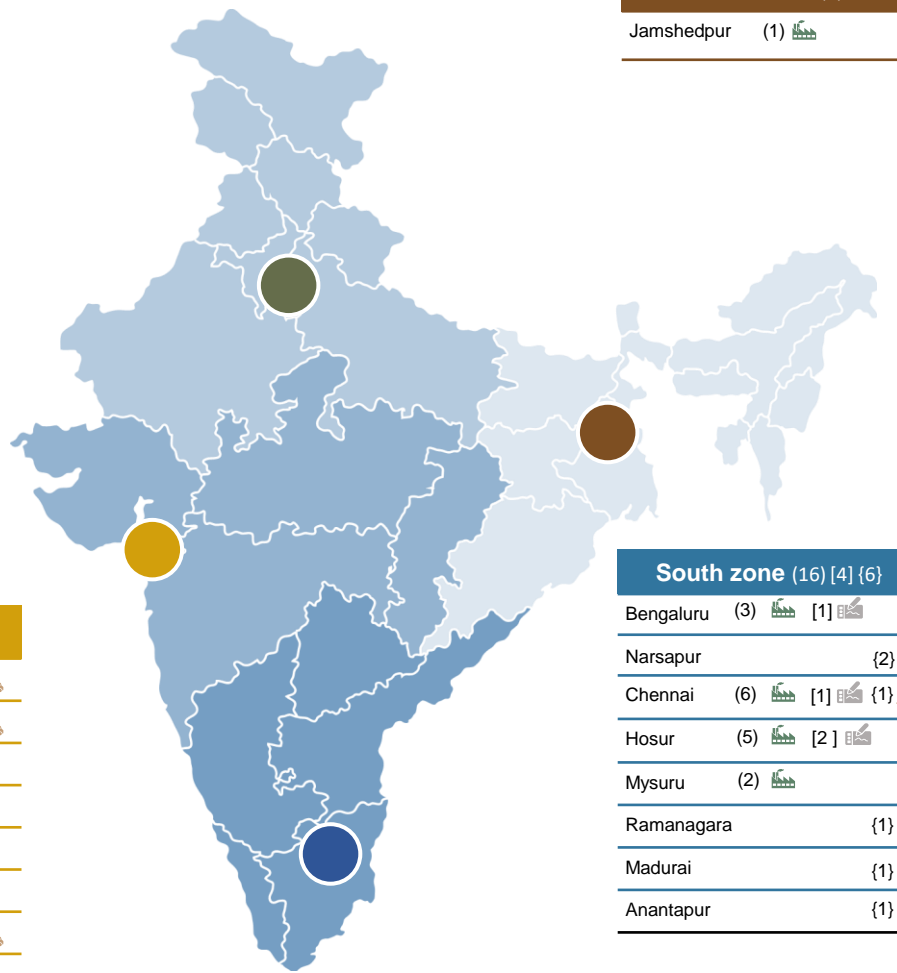
68 Plants	29 Engg. Centers	HO Head Office	RO Reg. Office	14 Warehouses
---------------------	----------------------------	------------------------------	------------------------------	-------------------------

North zone. (31) [17] {1}

Manesar (8) [6] HO
Bawal (10) [5]
Neemrana (1)
Bhiwadi (1)
Delhi RO {1}
Bahadurgarh (2) [1]
Sonipat (1)
Pantnagar (3) [1]
Haridwar (1)
Farukhnagar (2) [1]
Gurugram [3]
Baddi (1)
G. Noida (1)

East zone (1)

Jamshedpur (1)



South zone (16) [4] {6}

Bengaluru (3) [1]
Narsapur {2}
Chennai (6) [1] {1}
Hosur (5) [2]
Mysuru (2)
Ramanagara {1}
Madurai {1}
Anantapur {1}

West zone (20) [8] {7}

Gujarat (8) {4}
Pune/Chakan (7) [8] {2}
Waluj (1)
Pithampur (1)
Ranjangaon (1)
Supa (1)
Nasik {1}
Khed (1)

Growing International Presence

6 Plants	7 Sales Office	8 Engg. Centers	1 Warehouse
--------------------	--------------------------	---------------------------	-----------------------



North & South America (2)

Mexico (Queretaro) (1)
Colombia (Manizales) (1)

Europe (2) [7] {1}

France (Epernon)
Spain (La Carolina, Bilbao) (1) [1]
Germany (Reutlingen, Munich) (1) [6] {1}

Asia (w/o India) (2) [1]

Indonesia (Karawang) (1)
Taiwan (Tainan) (1)
Thailand (Bangkok)
Vietnam (Vin Phuc) (1)
Japan (Nagoya)
South Korea (Pyeongtaek)

TOP MANAGEMENT TEAM



Mr. Nirmal K Minda
Chairman & Managing Director



Mr. Ravi Mehra
Deputy Managing Director
& Head Group Corporate



Mr. Amit Jain
Group Chief Technical
Officer



Mr. A.G. Giridharan
CEO- Safety & Comfort
Systems Domain



Mr. Kundan K Jha
CEO, Light Metal &
Powertrain Systems
Domain



Mr. Naveesh Garg
CEO- Electronics and
Control Systems Domain



Mr. Rajeev Gandotra
CEO – Light & Acoustic
Systems Domain-2



Mr. Rakesh Kher
CEO – Aftermarket
Domain



Mr. Rakesh Mehta
Group CHRO



Mr. Sunil Bohra
Group CFO, CSO &
Corporate Affairs



Mr. Vivek Jindal
CEO – Light & Acoustic
Systems Domain-1



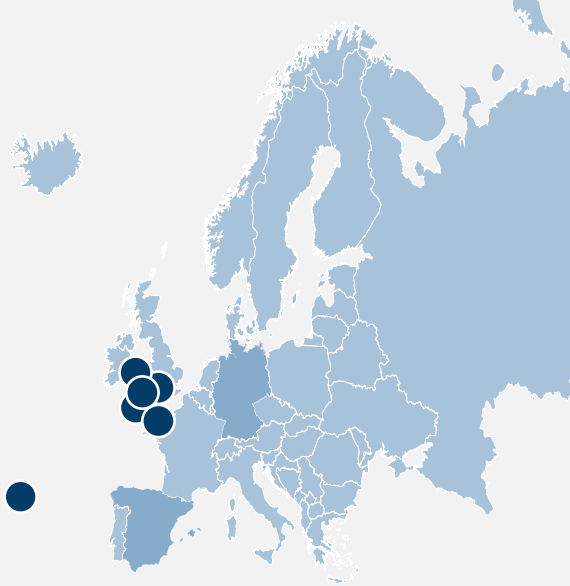
Mr. Ashok Taneja
Advisor



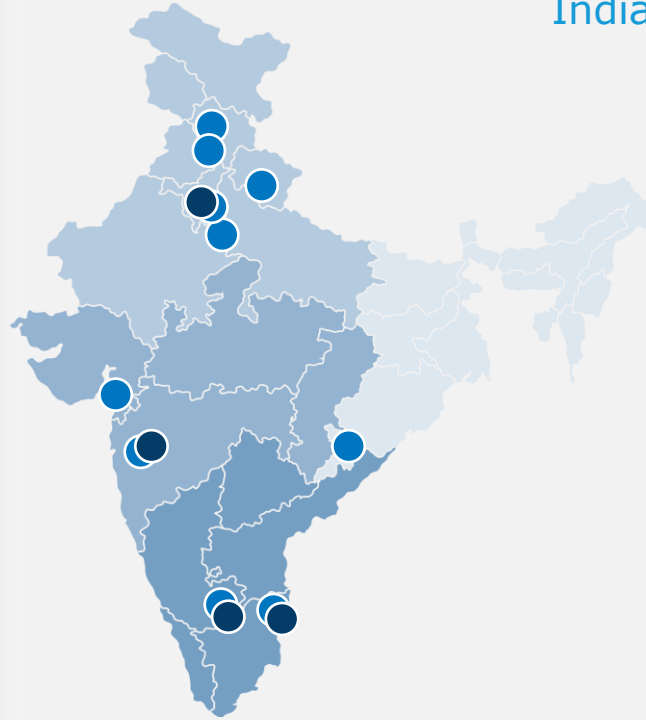
Mr. Navin Paul
Advisor

In-house R&D helps drive Innovation...

Europe



India



Two-tier Engineering Organization

Central R&D Centre With A Focus On Advanced & Future Technology

Pune, Gurugram, Chennai, Hosur & Bangalore	India
Regensburg, Munich, Ingolstadt-1, Wolfsburg -2, Osnabruck-1	Germany
Bilbao	Spain

Product-focused Business Engineering Teams

2W Switch, Mindarika, 4W Lighting, Minda Westport, Acoustic, Minda Nabtesco	Manesar
Minda Kosei, Minda Kyoraku, Toyoda Gosei Minda, Minda Onkyo, Uno Minda Buehler Motors	Bawal
2W Lighting	Bahadurgarh
Sensor, Controller, 2W Switch, 4W Lighting, ADAS, Mindarika	Pune
Uno Minda EV Systems	Farukhnagar
Seating	Hosur
Minda Storage Batteries	Pantnagar
2W Alloy Wheels	Supa, Ahmednagar
Densoten Minda	Gurugram
4W lighting	Japan
4W lighting	South Korea
4W lighting	Taiwan
Clartorn horn	Spain
Munich-1, Reutlingen-1, Regensburg-1	Germany

State Of Art Validation & Test Facilities



>1200
NPD
Engineers



252
Patents
Granted



37
R&D and
Engineering Centers



444
Patent Filed



463
Design Application Filed

UNO MINDA – Central R&D and Design Studio



Uno Minda's first flagship centre for research engineering and advance technologies.

MISSION: Attain Technology Leadership with Ingenious CREATors to **Innovate for the future of mobility** focusing on Value Creation, Quality, and Process.

400+
Engineers

5
Locations

75+
R&D Projects



Locations



Pune, India



Gurgaon, India



Chennai & Hosur, India



Regensburg, Germany

Focus



PERSONALIZED

Wireless Chargers | USB & Data Port Chargers | Smart Switches | Seats with Mechanisms | Interior & Exterior Lighting | E Horns



CONNECTED

Telematics Control Unit | IoT Platform



AUTONOMOUS

Automotive Cameras | Ultrasonic Sensors | Driver Monitoring System | ADAS Controllers



ELECTRIFIED

AC Chargers | AC – DC Chargers | DC DC Converter | AVAS

Key functional Competencies

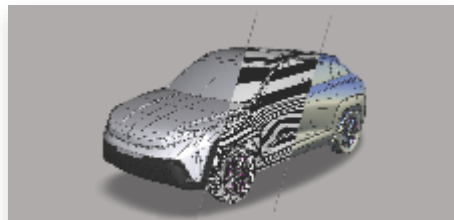
- Product Planning
- Technical Sales
- Simulation based Engineering
- Prototyping
- System Req & Architecture
- Functional / Sys Validation
- Mechanical
- Hardware & Layout
- Software
- Functional Safety
- New Product Control
- Engineering Quality
- Product Costing
- Manufacturing Engineering



An independent creative design studio that offers best-in-class creative services for mobility products and systems.



TRANSPORTATION DESIGN



DIGITAL SCULPTING



UI/UX DESIGN



DESIGN STRATEGY



PROTOTYPING



Strengthening
R&D

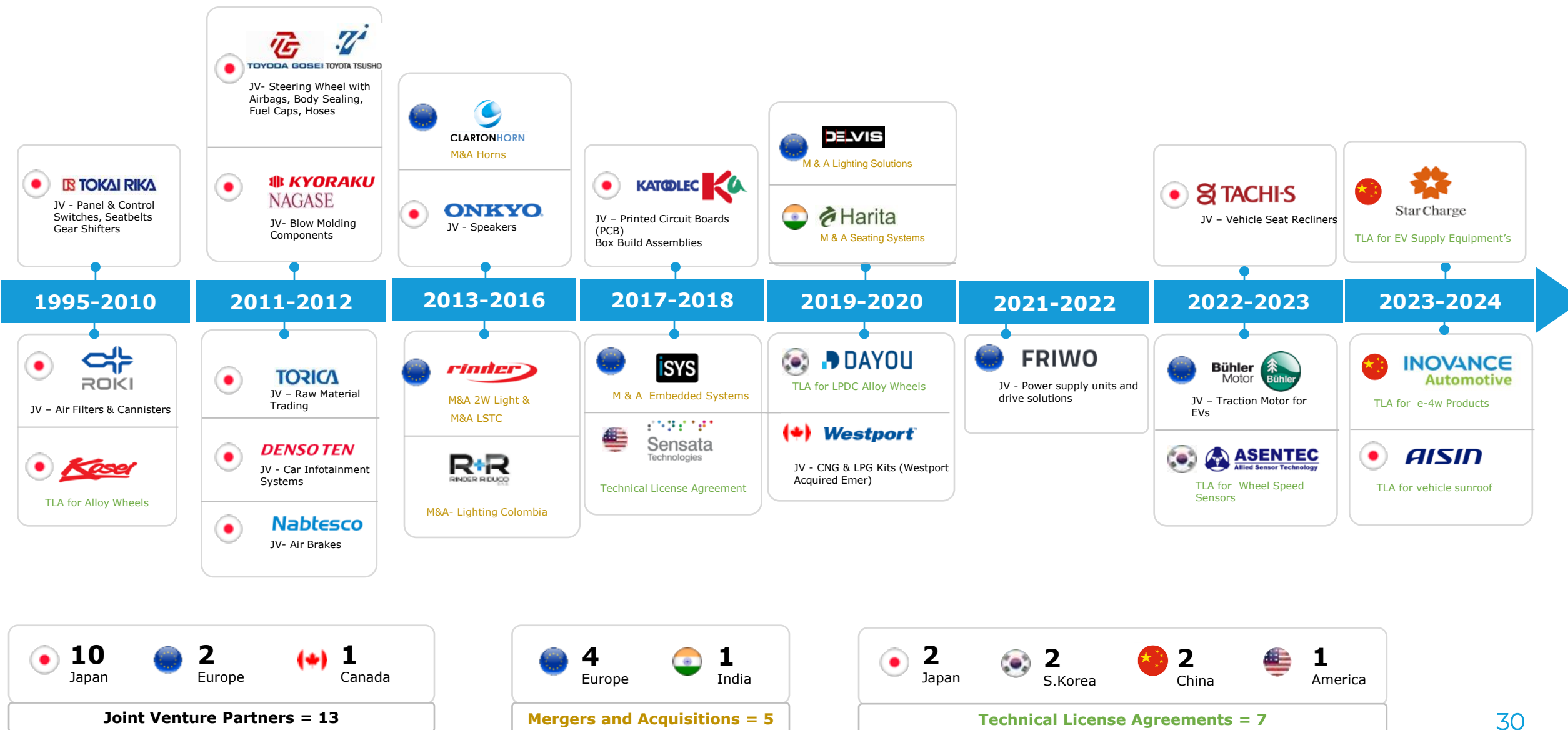
Advanced Technology Group

Focused on long horizon Technology projects (>3 Years)

Group Global Centre for Embedded & Software Technology

Focused on supporting embedded competency build-up for business

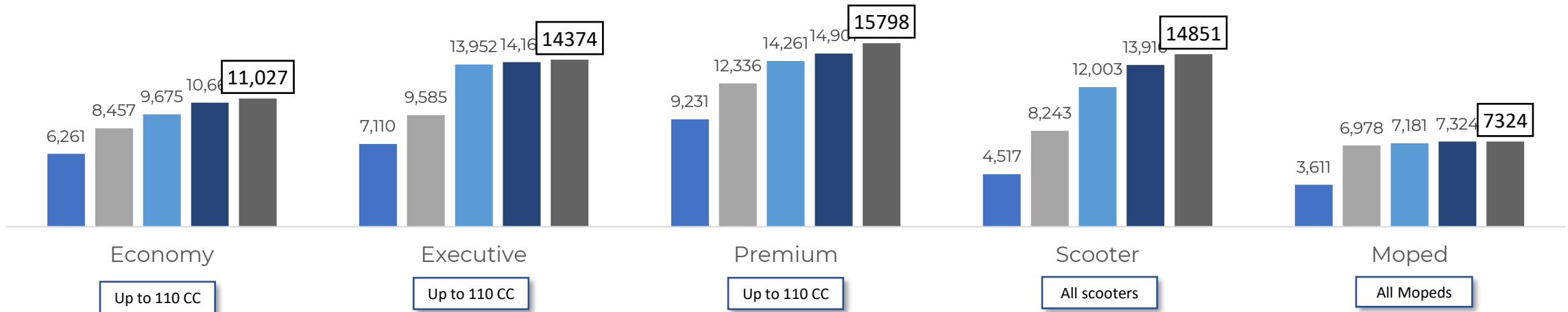
Nurturing Partnerships and Affiliations



POTENTIAL KIT VALUE – UNO MINDA

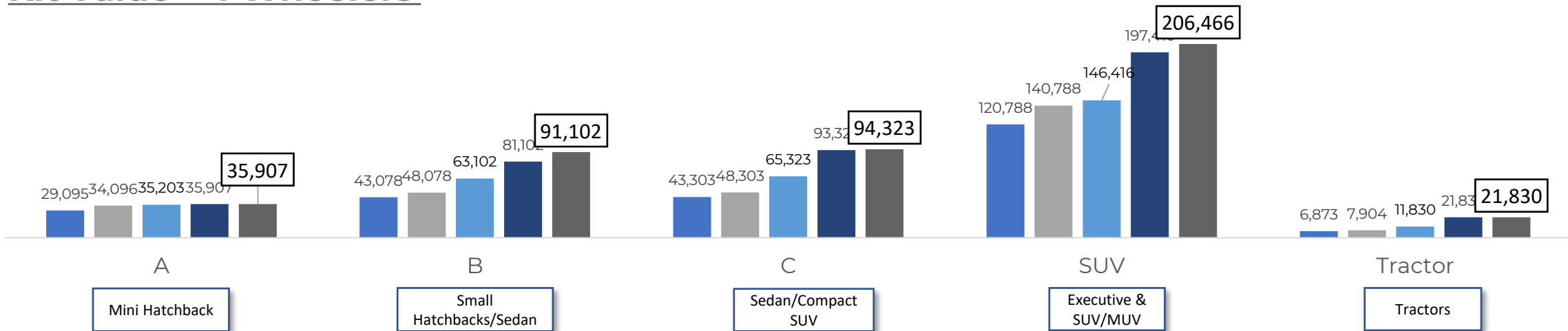
Kit Value – 2 Wheelers

■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024



■ 2020 ■ 2021 ■ 2022 ■ 2023 ■ 2024

Kit Value – 4 Wheelers



Environmental, Social & Governance (ESG)



Environmental

More than 90% of plants ISO 14001 & ISO 45001 certified
(Environmental & OHS Management System)

Energy and Emissions

Water Management

Waste Management



Social

Vision to enable Employee and Community Well-Being with following organizational goals:

Community Well Being (CSR)

Employee Well Being



Corporate Governance

Policies governing our business

Ethics and compliances

Economic Value Creation



15% Renewable Energy Share – FY 23-24

- 60% Renewable energy share by 2030
- Carbon Neutral Operations by 2040
- Carbon Net Zero by 2050



Our Journey

2007



Seva Kendra, Bagla, Hisar Haryana, Skills Centre

2010



MDMMS, Bagla Haryana Sr. Sec. School

2012



Samarth – Jyoti Project

2016



SLMCH, Bagla Haryana Charitable Hospital

2019



TSNMS, Kadi Gujarat Sr. Sec. School

2024



TSNMS, Poonapalli, Hosur Sr. Sec. School

Suman Nirmal Minda Foundation operates in Education, Vocational Training, Healthcare, and Community Development. Projects include Community Schools, Remedial classes, IT skill programs, and vocational training for children, girls, boys, and women in need. There are 17 CSR Centres in 7 states, along with three Sr. Secondary Schools and a Hospital providing quality education and healthcare support to communities.

Thematic Areas



Skill Development



Education



Community Wellbeing



Preventive & Curative Health Care

Awards & Recognitions

Customer Awards

2023-24

QUALITY

DELIVERY

BEST SUPPLIER

PARTNER AWARD

COST COMPETITIVENESS

BUSINESS EXCELLENCE



38*



Mr. Nirmal K Minda, CMD, Uno Minda Limited, has been awarded the prestigious **HURUN Self-made Entrepreneur Award, 2023!**



Uno Minda is proud to secure the **Great Place To Work® (GPTW)** Certification for the third consecutive year!



Dr. Suman Minda, Chairperson of Uno Minda's CSR Wing, has been honoured with the prestigious **Golden Peacock Award** for Social Leadership for her impactful work in social welfare and community development.



Uno Minda has been honoured with the prestigious **Intellectual Property Award** for 2023 in the 'Top Indian Company for Design' category.



Uno Minda has secured its **place among India's top 50 innovative companies** in manufacturing, receiving recognition from CII for our pioneering work in automotive technologies for the second consecutive year.



The CSR wing of Uno Minda Group received "**CSR Excellence in Women Empowerment**" for its Project "Samarth-Jyoti" during the India CSR & Sustainability Conclave 2023 for excellent accomplishments of work for women.

Certifications



Group Strengths



Long Standing Relationships with OEMs

6 Decades of Preferred Supplier status with Major OEMs across all segments



Located close to each customer

Located in all Automotive hubs in India, Growing Global Presence



Strategic & Technology Driven Alliances

With Global Technology Leaders supporting various Product Lines



Robust Systems and Governance mechanism

Strong System, Processes with experienced board to drive Governance and Ethical Practices



Human Resources

Great place to work certified. Focus on promoting In-house Talent & Succession Management



Trustworthy and Capable Supplier Base

More than 1500 Suppliers spread across Geographies



Strong R&D Capabilities

37 R&D and Engineering Centers Globally



Extensive Aftermarket Distribution Network

1500 Business Partners, 35000 Retailers & 75000 Service Points



Cyber risk Management

Strong & robust Security Management & Cyber risk Management framework to safeguard company from cyber threats



Thank You

Corporate Office

Address: Village Nawada Fatehpur, P.O. Sikanderpur
Badda, Manesar, Gurgaon – 122004, India.

Website: www.unominda.com

For further information, please contact

Mr. Ankur Modi
Vice President
Head Treasury and Communication
amodi@unominda.com

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