



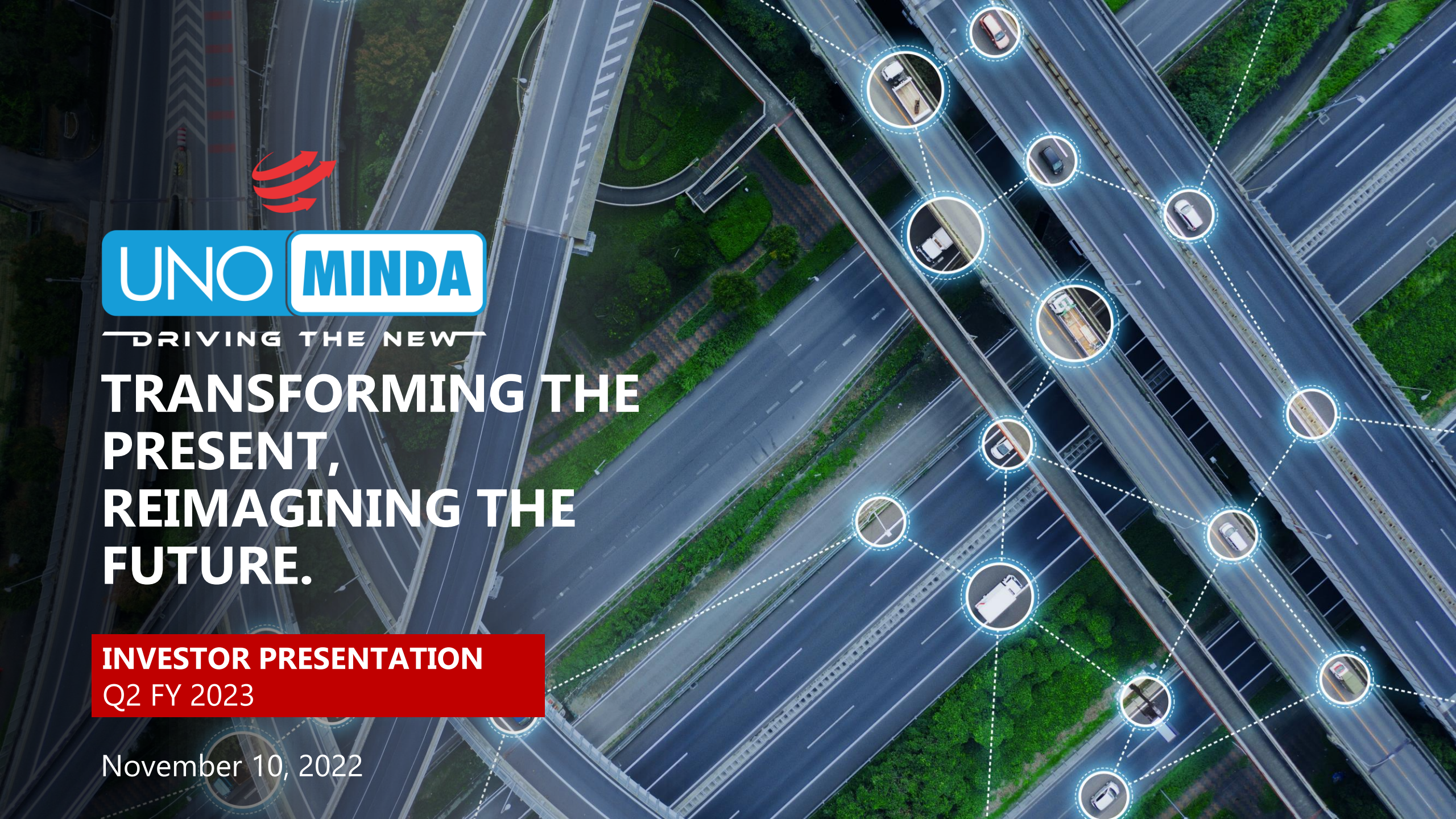
UNO MINDA

— DRIVING THE NEW —

**TRANSFORMING THE
PRESENT,
REIMAGINING THE
FUTURE.**

INVESTOR PRESENTATION
Q2 FY 2023

November 10, 2022



SAFE HARBOR

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INDUSTRY HIGHLIGHTS

Government Initiatives:

Anti dumping duty has been extended on 4W Alloy Wheels to have level playing field for alloy wheel manufacturers in India.

Semi-conductor Chip Shortage:

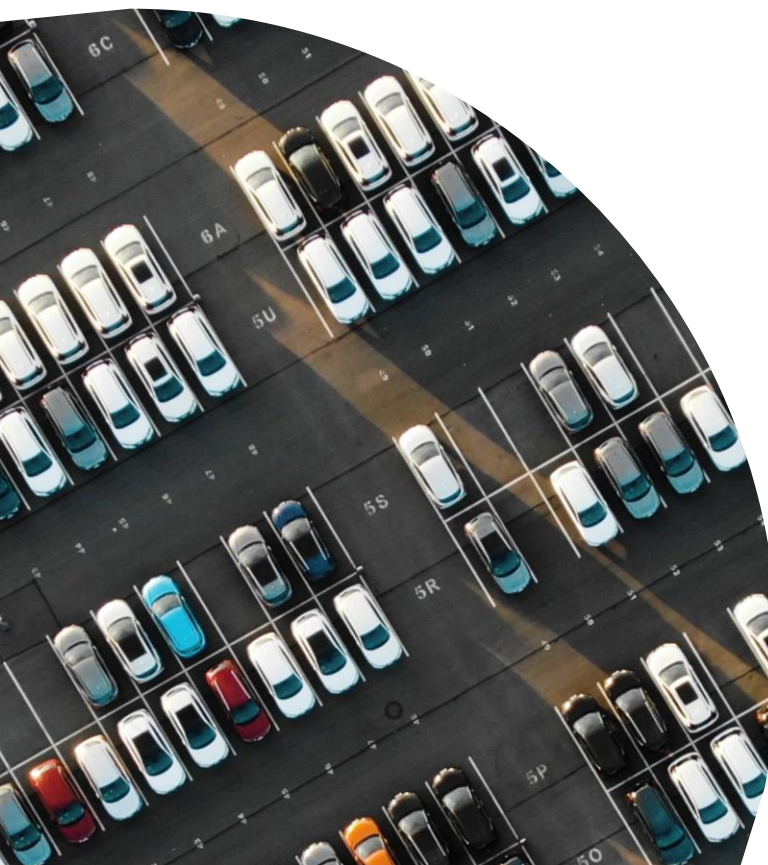
The supply side pressures are easing out with promising volumes from the OEMs.

Improved 2W Demand amidst stable PV volumes:

PV demand continued to remain promising led by the array of new launches amidst the early signs of revival in 2W and CV business

Pricing Pressure:

Pricing Pressure have started to ease out as the metal costs continue to dip southwards, however gas prices remain at elevated level



KEY OPERATIONAL HIGHLIGHTS FOR THE QUARTER

JV with Buehler

The Board approved formation of JV with 50.1% stake held by Uno Minda to manufacture traction motors for 2W and 3W EV vehicles

New 4W Light Manufacturing Facility

is approved by Board at a total outlay of Rs ~400 Crs over the course of next 5 years. Initial Outlay is estimated to be ~230 Crs

Expansion in 4W Alloy Wheel Capacity

The Board approved another expansion of 60K wheels at a project cost of Rs 190 Crs at Bawal Plant of Minda Kosei Aluminum Wheels

JV with Tachi-S

The Board has approved formation of JV with 51% stake held by Uno Minda to manufacture recliners and other seating mechanisms in phased manner

New 4W Switches Manufacturing Facility

is approved by Board to be set up at Farukhnagar under the subsidiary, Mindarika Pvt. Ltd at an initial outlay of Rs 110 Crs

FINANCIAL INFORMATION & RECENT UPDATES



KEY FINANCIAL HIGHLIGHTS FOR THE QUARTER

Revenues increased by 36% Y-o-Y to

Rs 2,877 Cr

for the quarter



EBIDTA higher by 40% Y-o-Y to

Rs 318 Cr

for the quarter



EBIDTA margin higher by 29 bps on Y-o-Y at

at 11.1%

for the quarter



PAT increased by 80% on Y-o-Y basis to

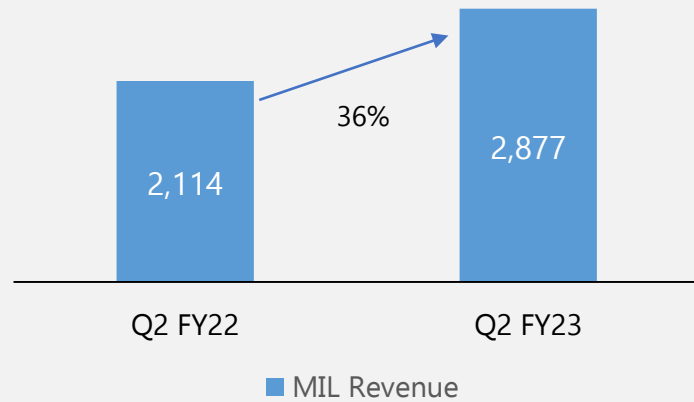
Rs 170 Cr

for the quarter

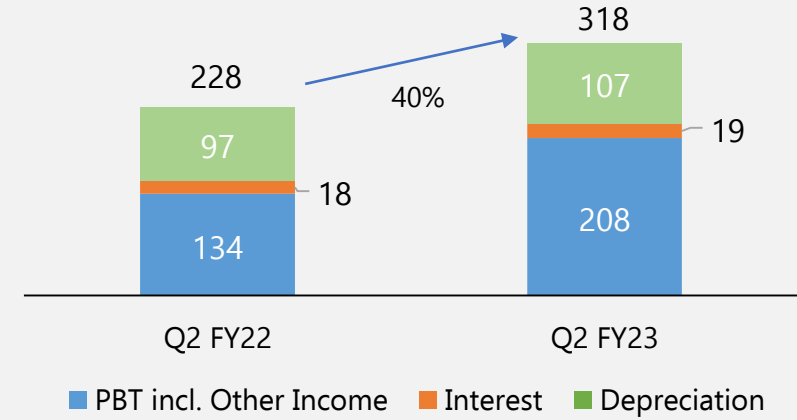


CONSOLIDATED FINANCIAL HIGHLIGHTS – Q2 FY23

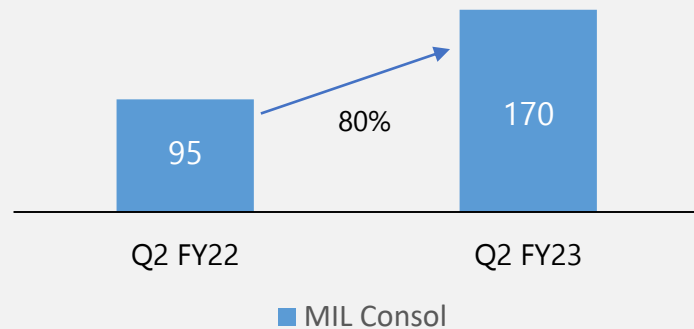
Revenue (Rs. Cr)



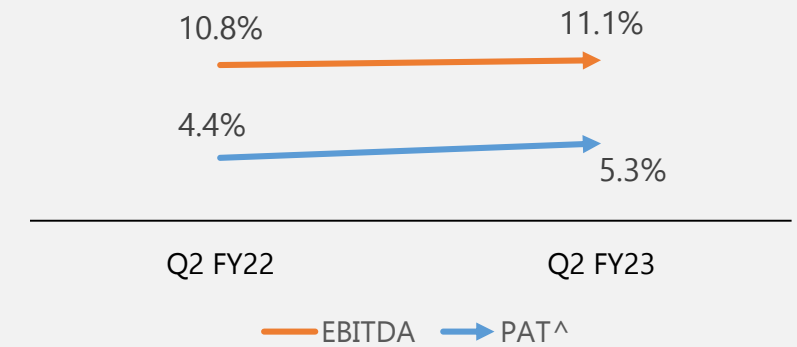
EBITDA (Rs. Cr)



PAT* (Rs. Cr)



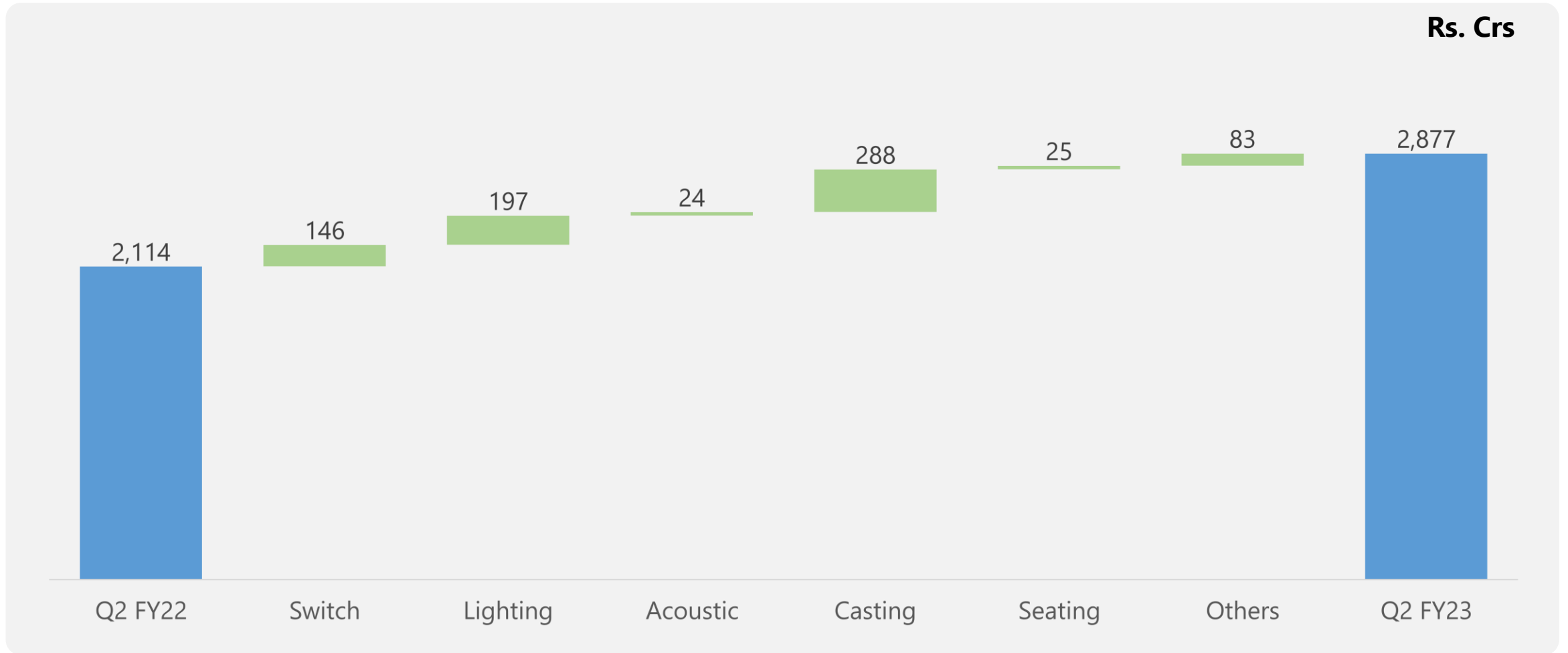
Margin (%)



*PAT UML Share

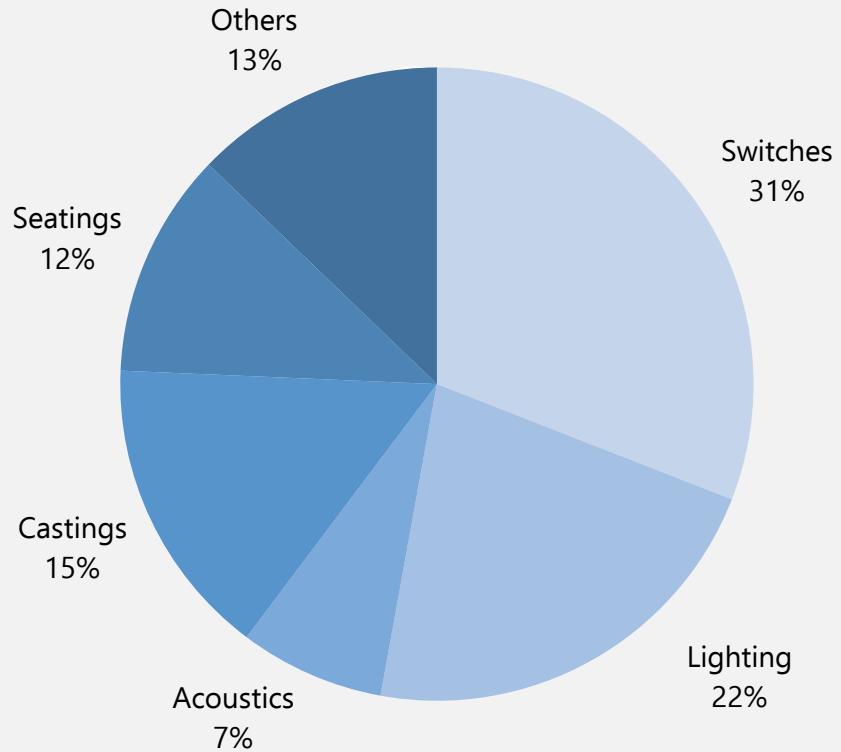
| ^PAT before profit share of JVs/ & Associates and Minority Interest

REVENUE BRIDGE – Q2 FY23

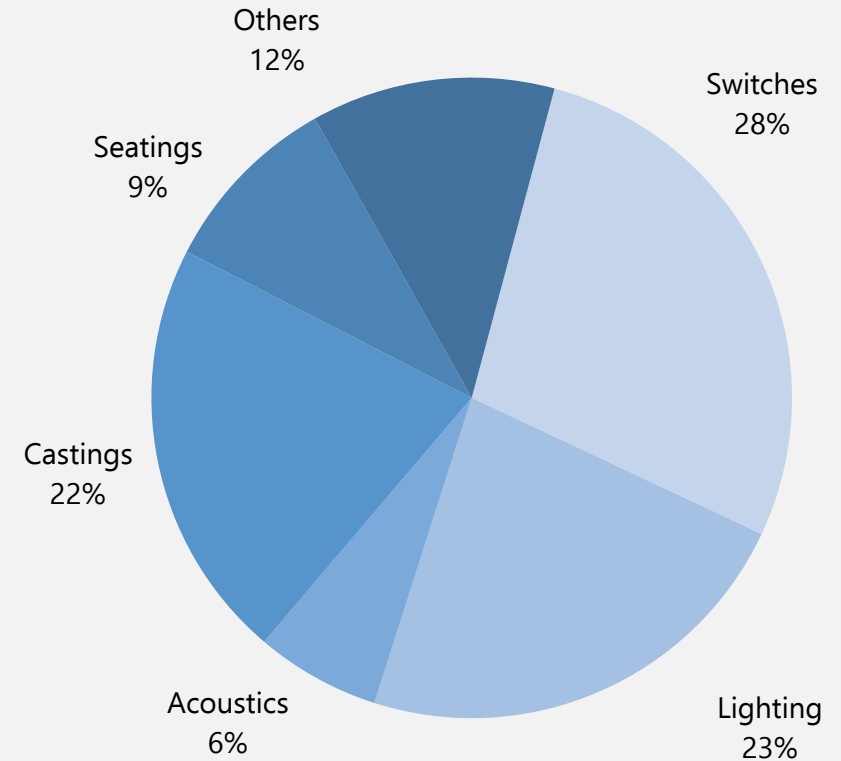


DIVISION-WISE REVENUE MIX

Q2 FY22 (%)

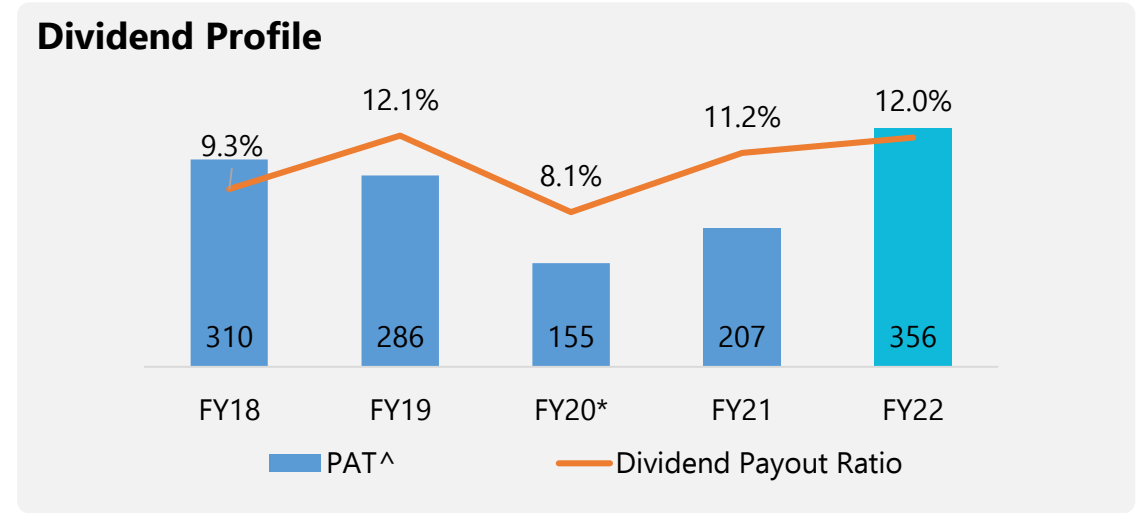
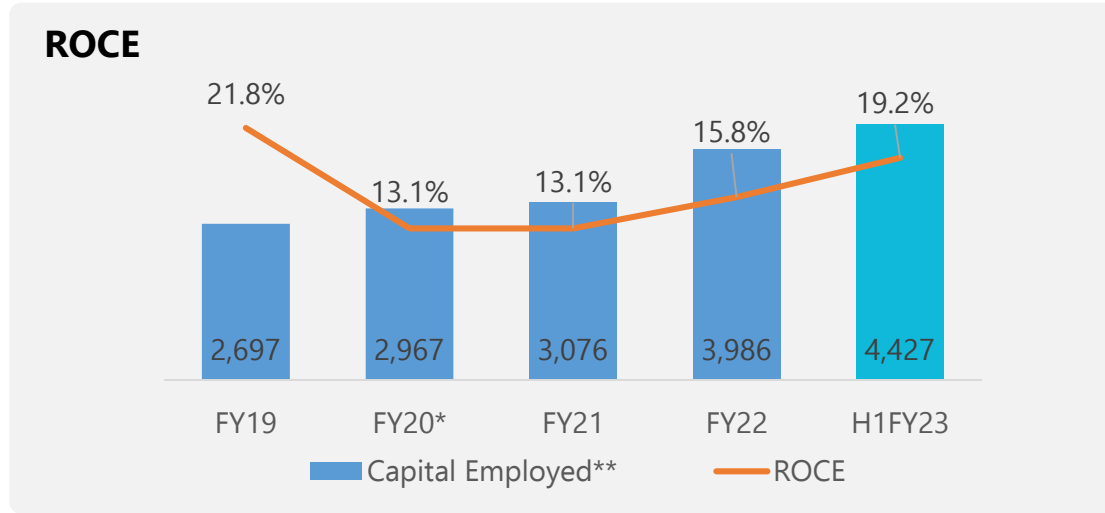


Q2 FY23 (%)

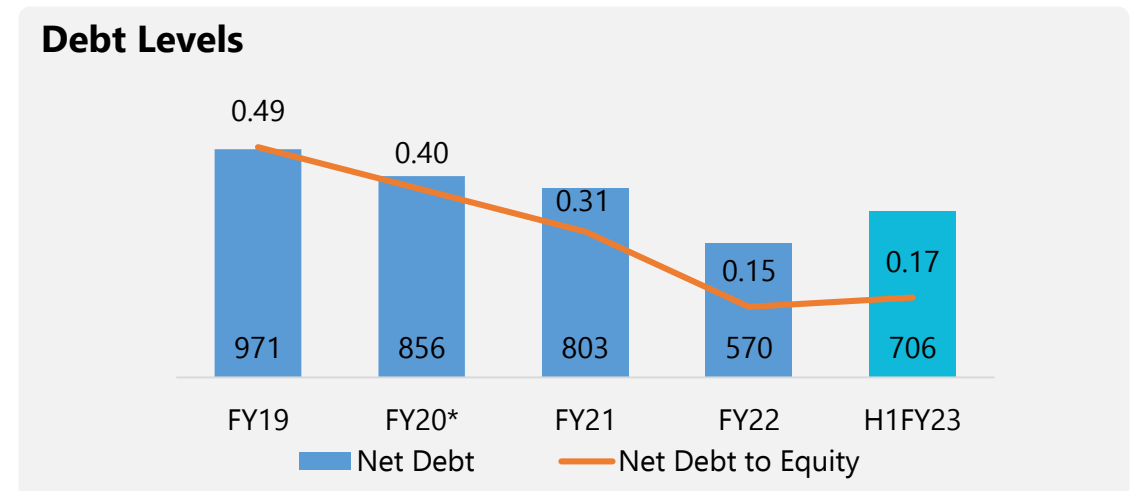
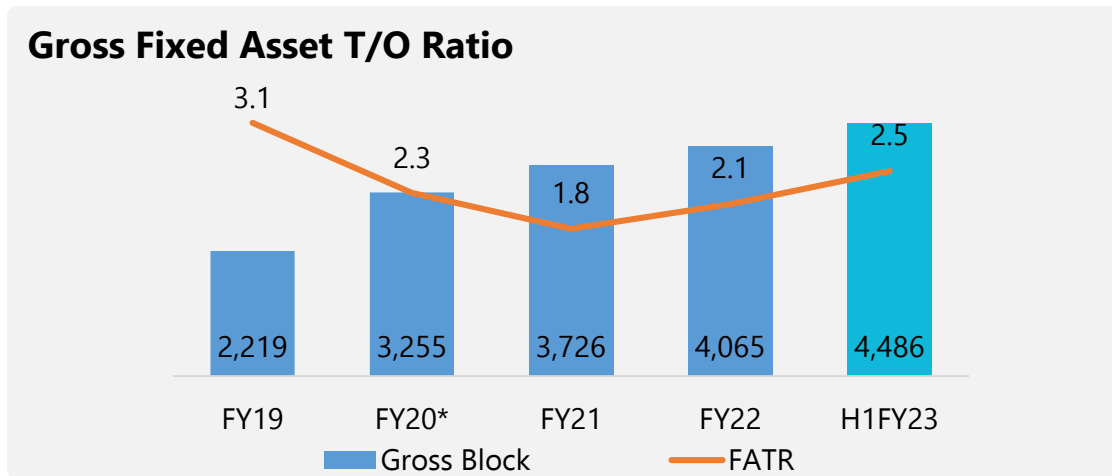


FINANCIAL INDICATORS

Building Shareholder Value year on year...



Growth without stressing the Balance Sheet...

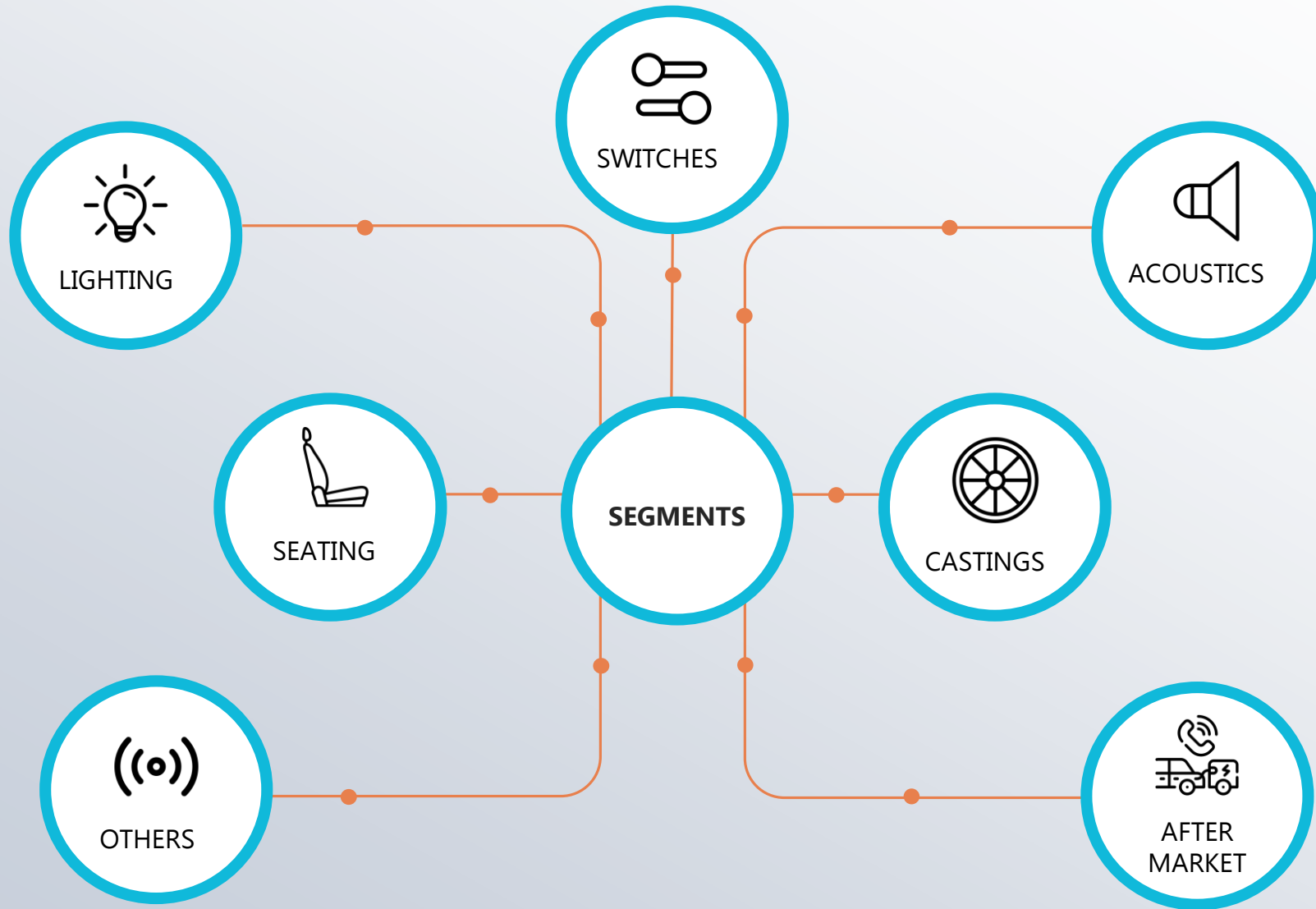


*Restated


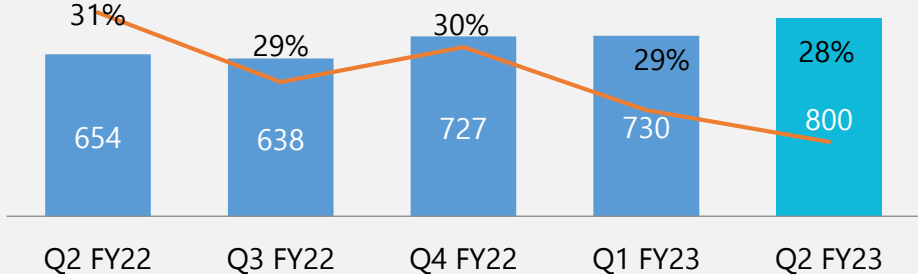

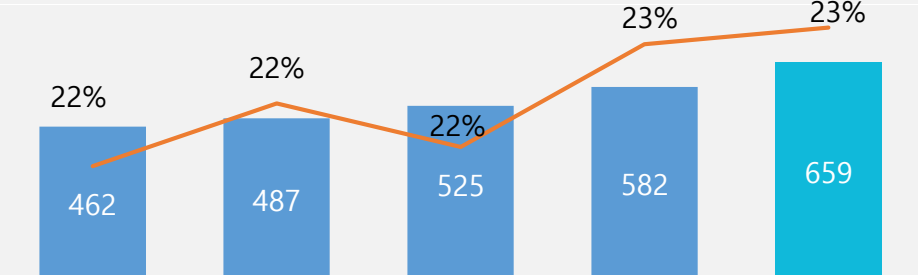

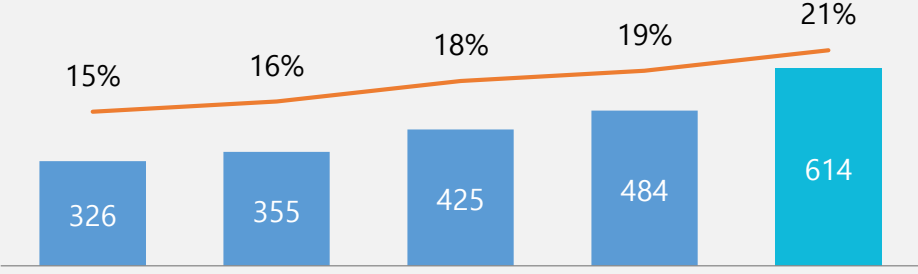
**Capital Employed less Non-current Investments in JV/Associates

^PAT UML Share

BUSINESS REVIEW


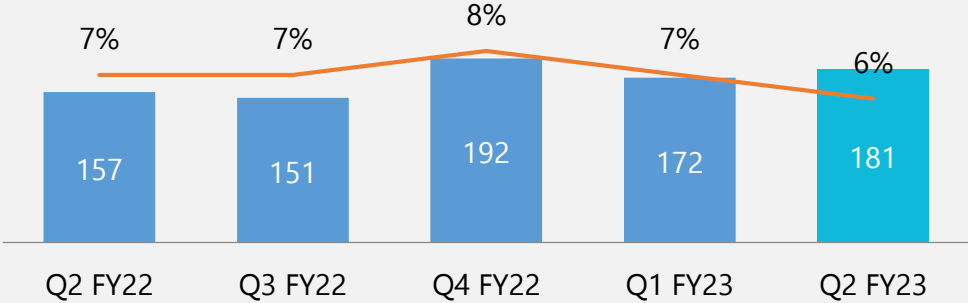

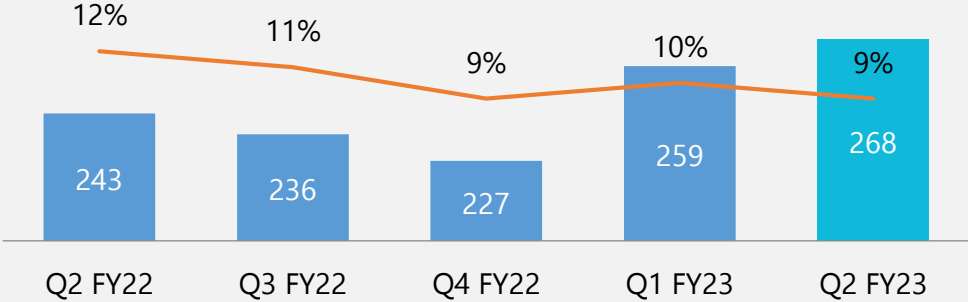

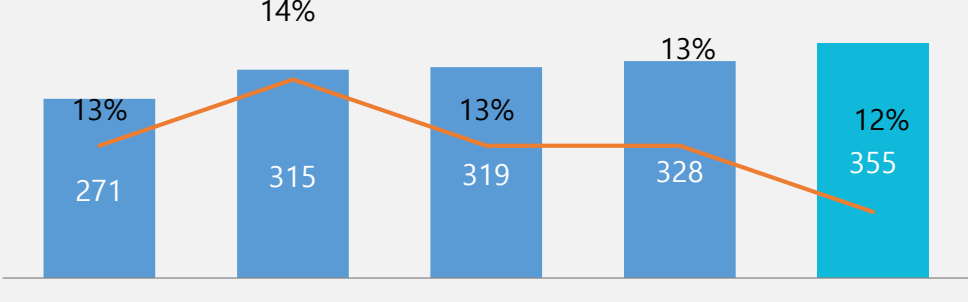


BUSINESS REVIEW

Product Segment	Revenue Growth (Figures in Rs Crores)	Strategic Business Developments																		
 <p>Switches</p>	 <table border="1"> <thead> <tr> <th>Quarter</th> <th>Revenue (Rs Crores)</th> <th>Revenue Share (%)</th> </tr> </thead> <tbody> <tr> <td>Q2 FY22</td> <td>654</td> <td>31%</td> </tr> <tr> <td>Q3 FY22</td> <td>638</td> <td>29%</td> </tr> <tr> <td>Q4 FY22</td> <td>727</td> <td>30%</td> </tr> <tr> <td>Q1 FY23</td> <td>730</td> <td>29%</td> </tr> <tr> <td>Q2 FY23</td> <td>800</td> <td>28%</td> </tr> </tbody> </table>	Quarter	Revenue (Rs Crores)	Revenue Share (%)	Q2 FY22	654	31%	Q3 FY22	638	29%	Q4 FY22	727	30%	Q1 FY23	730	29%	Q2 FY23	800	28%	<ul style="list-style-type: none"> Received Order for heated 2W handle grip from an American auto major
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 <p>Lighting</p>	 <table border="1"> <thead> <tr> <th>Quarter</th> <th>Revenue (Rs Crores)</th> <th>Revenue Share (%)</th> </tr> </thead> <tbody> <tr> <td>Q2 FY22</td> <td>462</td> <td>22%</td> </tr> <tr> <td>Q3 FY22</td> <td>487</td> <td>22%</td> </tr> <tr> <td>Q4 FY22</td> <td>525</td> <td>22%</td> </tr> <tr> <td>Q1 FY23</td> <td>582</td> <td>23%</td> </tr> <tr> <td>Q2 FY23</td> <td>659</td> <td>23%</td> </tr> </tbody> </table>	Quarter	Revenue (Rs Crores)	Revenue Share (%)	Q2 FY22	462	22%	Q3 FY22	487	22%	Q4 FY22	525	22%	Q1 FY23	582	23%	Q2 FY23	659	23%	<ul style="list-style-type: none"> Received Order for 2W lamps from an American auto major Received an order for complete lighting solution (LED Head Lamp/ Tail Lamp/ Blinkers) from a 2W EV OEM
Quarter	Revenue (Rs Crores)	Revenue Share (%)																		
Q2 FY22	462	22%																		
Q3 FY22	487	22%																		
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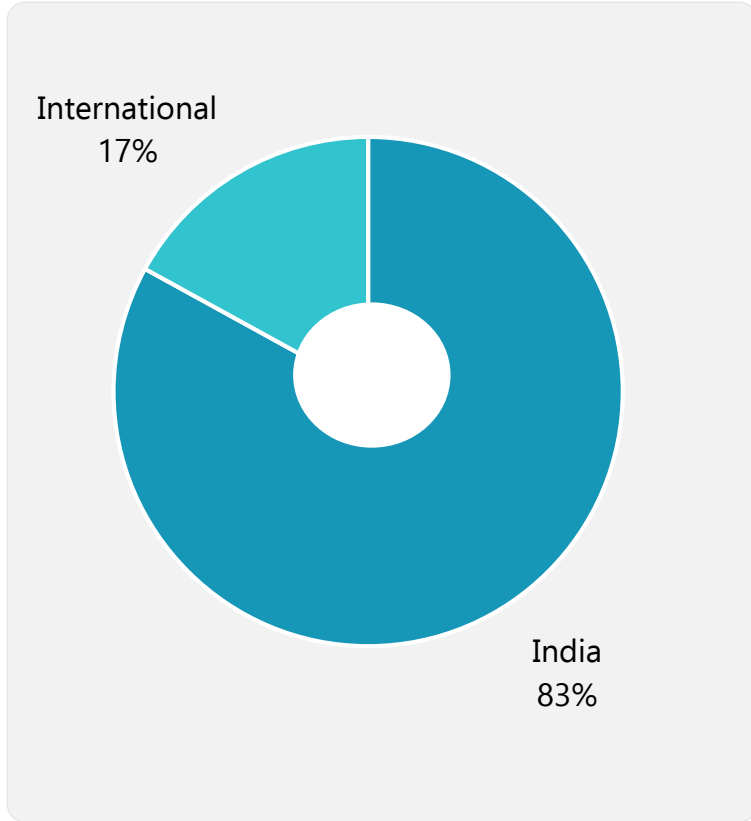
■ Revenue — Revenue Share

BUSINESS REVIEW

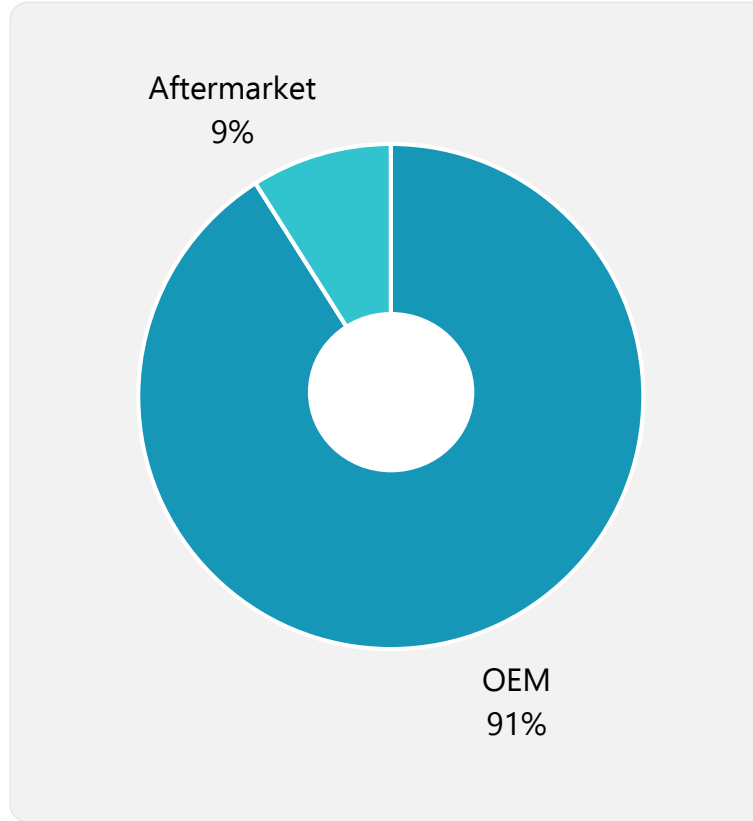
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Quarter	Revenue (Rs Crores)	Revenue Share (%)																		
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Quarter	Revenue (Rs Crores)	Revenue Share (%)																		
Q2 FY22	271	13%																		
Q3 FY22	315	14%																		
Q4 FY22	319	13%																		
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■ Revenue — Revenue Share

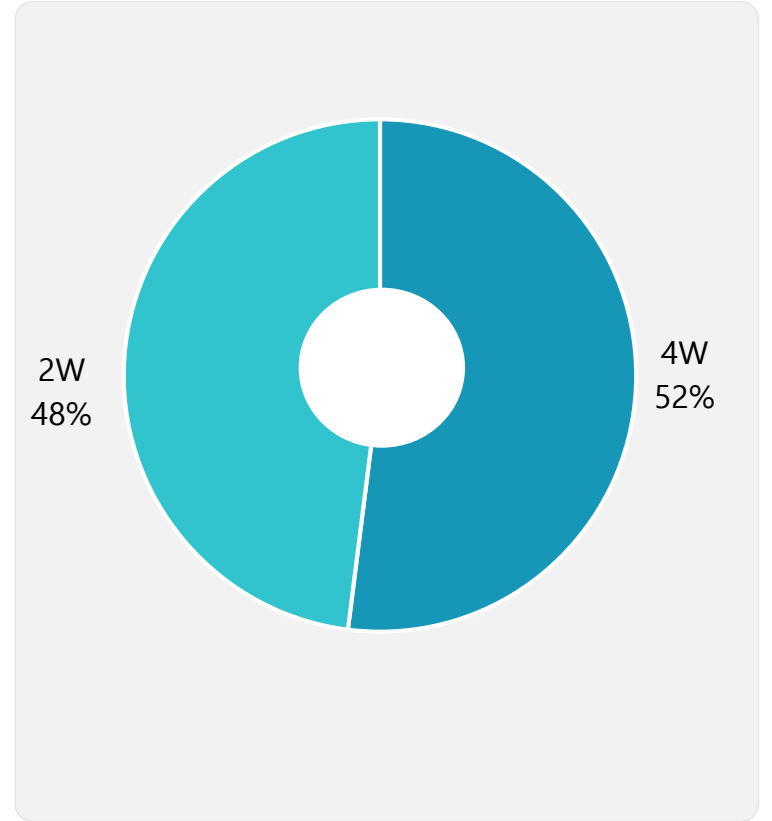
REVENUE BREAKUPS



Geography-wise Breakup



Channel-wise Breakup



Segment-wise Breakup

AFTERMARKET- EXPANDING B2C BUSINESS

Key Highlights

- Revenue of Rs 252 Crs 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

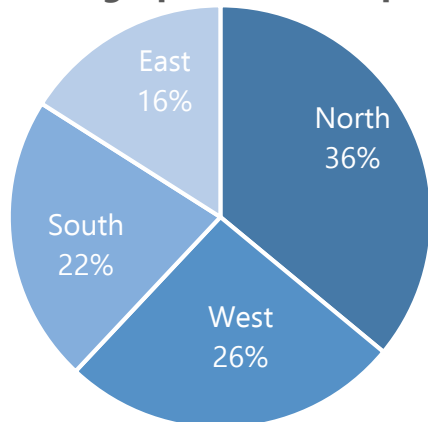
150,000+

Workshops

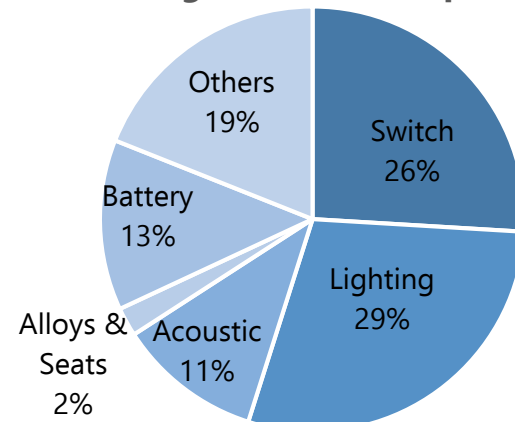
6 Export Regions

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

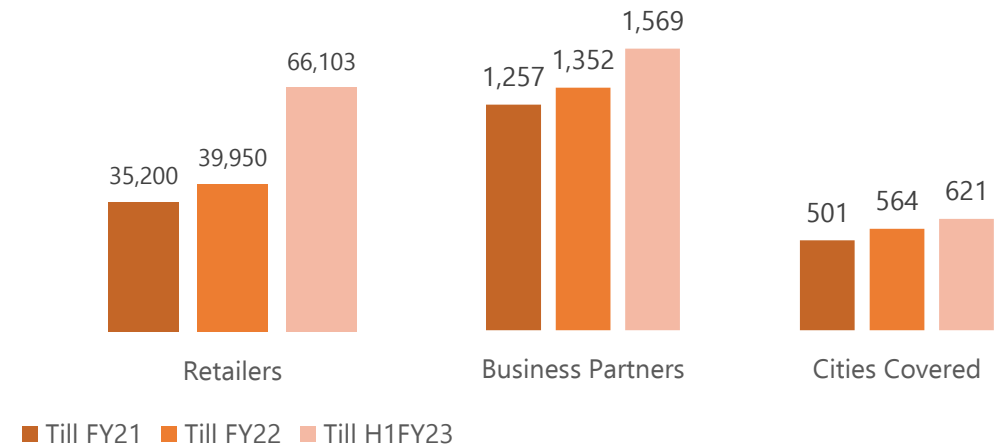
Geographical Breakup



Segmental Breakup



Expanding Network



Strategic Business Update

Joint Venture with Buehler Motor

About Buehler Motor

- Buehler Motor GmbH (“Buehler”), is a Germany based, leading global company providing customized mechatronic drive solutions .
- Buehler is 165 years old organisation currently headquartered in Nuremberg, Germany with manufacturing facilities in Germany, Czech Republic, USA, Mexico and China. They specialize in the automotive industry, aviation and many other industrial applications.
- Their expertise is much beyond DC and BLDC motors, gear motors and pumps. They supply more than 20 Mn unit annually to its customers.

Joint Venture with Uno Minda

- The Board has approved to enter into a JV agreement with Buehler Motor to develop, manufacture and market traction motors for battery driven electric 2 wheelers and 3 wheelers in India and other SAARC nations.
- Addition of Traction motors will further complement the company’s already formidable EV specific product portfolio, especially the motor controllers.
- Total Capex for the project is envisaged to be Rs ~110 Crores over the course of next 5 years. This shall be funded through an appropriate mix of Equity, Debt and Internal Accruals.

New 4W Lighting Plant

- The Board has approved setting up of new lighting plant with a total outlay of Rs ~400 Crs over the course of next 5 years to meet increased demand.
- Initial outlay i.e. phase 1 is of Rs 230 Cr in next two years to set up the plant. This shall be funded through an appropriate mix of Internal Accruals and Debt.
- Phase 1 shall be operational by Q4FY24

Strategic Business Update

Joint Venture with Tachi-S

About JV Partner

- Established in 1954, Tachi-S is a leading seats manufacturer headquartered in Tokyo, Japan.
- With a diversified revenue of 206 BN ¥, TACHI-S is an integrated automobile seat manufacturer having 70 facilities in 13 countries.
- Uno Minda shall hold 51% stake in this JV, while remaining stake shall be held by Tachi-S

JV Rationale and Way Forward

- Uno Minda group is already an established automotive seating system supplier for CVs, 2Ws and Off-road vehicles. With this JV, we firmly announce our expansion into 4Ws too
- In addition to its current offerings, the JV intends to develop following products in a phased manner subject to feasibility:
 - ✓ Seating mechanisms including sliders, height adjusters
 - ✓ Seat Frames
 - ✓ Full Seats and Seating Assembly



Recliners



Seat Frames



Full Seats

Capital Expansion Update

Product Line	Entity	Total Cost (In Crs)	Location	Capacity	Expected SOB	Update
Blow Moulding	Minda Kyoraku Ltd	90	Bengaluru	Blow Moulding and Paint Shop Facility	Q4 FY23	Capex on Track
4W Alloy Wheels	Minda Kosei Aluminum Wheels	74	Ahmedabad	30k Wheels p.m.	Q1 FY24	Capex on track
2W Alloy Wheels	Uno Minda Ltd	190	Pune	2 MN Wheels p.a.	Q4 FY23	Capex on track
4W Lighting	Minda Industries Vietnam (MIVCL)	37	Hanoi, Vietnam	New Lighting Facility	Q3 FY23	Capex on track
EV Specific	UnoMinda EV Systems Pvt Ltd	390	Gurugram	New facility for EV specific products	Q1 FY24 Phase I	Construction started To be spend over 6 years
4W Switches	Mindarika Pvt Ltd	73	Chennai	New Switch Facility	Q2 FY24	Land acquisition complete
4W Alloy Wheels	Minda Kosei Aluminum (MKA)	190	Bawal	60k Wheels p.m.	Q2 FY25	Project announced
4W Switches	Mindarika Pvt Ltd	110	Gurugram	New Switch Facility	Q2 FY24	Land acquisition under process
4W Lighting	Uno Minda Limited	400 (Phase I – 230 Cr)	Under Evaluation	New Lighting Facility	Q4 FY24	Project announced To be spend over 5 years
EV Specific	Buehler Motor JV	110	Bawal	Traction Motor Production Facility	Q4 FY 24	Project announced To be spend over 6 years

ANNEXURES



CONSOLIDATED PROFIT & LOSS STATEMENT

Particulars (Rs. Crores)	Q2 FY23	Q1 FY23	Q-o-Q%	Q2 FY22	Y-o-Y%	H1 FY23	H1FY22	YoY%
Revenue from Operations (Net of Excise)	2,877	2,555	13%	2,114	36%	5,432	3,717	46%
Raw Material	1,866	1,656		1,341		3,522	2,323	
Employee Cost	365	341		303		706	579	
Other Expenses	328	292		243		620	441	
EBITDA	318	266	20%	228	40%	584	375	56%
EBITDA Margin	11.1%	10.4%	66 bps	10.8%	29 bps	10.8%	10.1%	68 bps
Other Income	16	10		21		26	27	
Depreciation	107	99		97		207	187	
EBIT	227	176	29%	152	49%	403	214	88%
EBIT Margin	7.9%	6.9%	101 bps	7.2%	70 bps	7.4%	5.8%	165 bps
Finance Cost	19	17		18		36	36	
Profit before Share of Profit/Loss of JVs and Tax	208	159	31%	134	55%	367	178	106%
PBT Margin	7.2%	6.2%	100 bps	6.4%	87 bps	6.8%	4.8%	197 bps
Tax	55	31		42		86	56	
Profit before Share of Profit/Loss of JVs	154	128	31%	92	55%	282	122	106%
PAT Margin %	5.3%	5.0%	32 bps	4.4%	98 bps	5.2%	3.3%	190 bps
Share of Profit/Loss of JVs	29	22		21		51	16	
Net profit/(loss) after share of profit/(loss) of associates / joint ventures (A)	182	150	22%	113	61%	332	138	140%
PAT attributable to:								
- Owners of MIL	170	139	23%	95	80%	309	110	180%
- Non Controlling Interests	12	11		19		23	28	
Other Comprehensive Income	18	6		4		23	9	
Total Comprehensive Income for MIL	188	144	30%	99	90%	332	119	179%
TCI Margin %	6.5%	5.7%	87 bps	4.7%	184 bps	6.1%	3.2%	291 bps
Total Comprehensive Income for Non Controlling Interests	12	11		18.2		23	28	

CONSOLIDATED BALANCE SHEET

Particulars (Rs. Crores)	H1 FY23	FY22
ASSETS		
1. Non-current assets		
Property, plant and equipment	2,275	2,053
Right-of-use assets	190	183
Capital work-in-progress	126	335
Goodwill	282	284
Other intangible assets	270	285
Intangible assets under development	7	11
Investment in associates and joint ventures	639	595
<u>Financial Assets</u>		
(i) Investments	133	-
(i) Other financial assets	34	26
Deferred tax assets	42	34
Other non-current assets	84	39
Non-current tax assets	30	31
Total- Non current asset	4,112	3,876
2. Current Assets		
Inventories	1,232	1,046
<u>Financial Assets</u>		
(i) Investments	2	12
(ii) Trade receivables	1,678	1,377
(iii) Cash and cash equivalents	238	202
(iv) Bank balance other than (iii) above	25	32
(v) Other financial assets	119	46
Other current assets	264	240
Total- Current assets	3,557	2,956
TOTAL ASSETS	7,670	6,832

Particulars (Rs. Crores)	H1 FY23	FY22
EQUITY AND LIABILITIES		
Equity share capital	115	57
Share Application Money Pending Allotment	2	-
Other equity	3,639	3,381
Equity attributable to owners of the Company	3,756	3,438
Non-controlling interest	340	326
Total Equity	4,095	3,765
1. Non-current liabilities		
<u>Financial Liabilities</u>		
(i) Borrowings	362	375
(ii) Lease liabilities	104	111
(iii) Other financial liabilities	84	33
Provisions	91	85
Deferred tax liabilities	58	62
Other non current liabilities	4	58
Total- Non current liabilities	703	725
2. Current Liabilities		
Contract liabilities	115	116
<u>Financial Liabilities</u>		
(i) Borrowings	609	441
(ii) Lease liabilities	15	17
(iii) Trade payables		
(a) Dues of micro & small enterprises	327	179
(b) Dues of creditors other than micro & small enterprises	1,376	1,233
(iv) Other financial liabilities	157	177
Current tax liabilities	31	28
Other current liabilities	144	87
Provisions	98	64
Total Current liabilities	2,871	2,342
TOTAL Equity and Liabilities	7,670	6,832

ABOUT UNO MINDA

TRANSFORMING THE PRESENT,
REIMAGINING THE FUTURE.



ABOUT UNO MINDA



#1

Seats
Telematics
Automotive Horns
Alloy Wheels
Blow Moulding
Parts
Automotive
Switches

#2

Reverse Parking
Sensor
Speakers
Airbags
Air Filters

- Uno Minda Limited is one of the leading manufacturers of auto components domestically with leadership across key product segments. With **20+ Product Lines**, **1000+ Business Partners** and over **23,000 employees**, covering **50,000+ touch points**, the company has **6 decades of experience** in the Auto space
- The company has a well diversified product portfolio with marquee clientele, both globally and domestically.
- Continuously expanding capabilities through capacity expansion & partnerships with global majors.
- 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 existing and potential clients.
- 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, with a team of **700+ engineers**, **275+ Patents** and **250+ design registrations**, with **75+ R&D technology projects** underway
- Track record of robust financial performance and delivering strong shareholder returns, supported by reputed promoters with rich experience and backed by professional management team.
- Uno Minda over the years has diversified across product divisions (Acoustics, Switches, Castings, Lighting and others), segments (4Ws & 2Ws) and geographies (International & Domestic) and channels (replacement & OEM).

GLOBAL & DOMESTIC PRESENCE - UNO MINDA

Strategically located plants across all major auto hubs

Overseas

6 Plants

7 Sales Offices

4 Design Centers

India

66 Plants

11 R&D Centers

Head Office

Registered Office



North and South America

Mexico (Queretaro)	
Colombia (Manizales)	

Europe

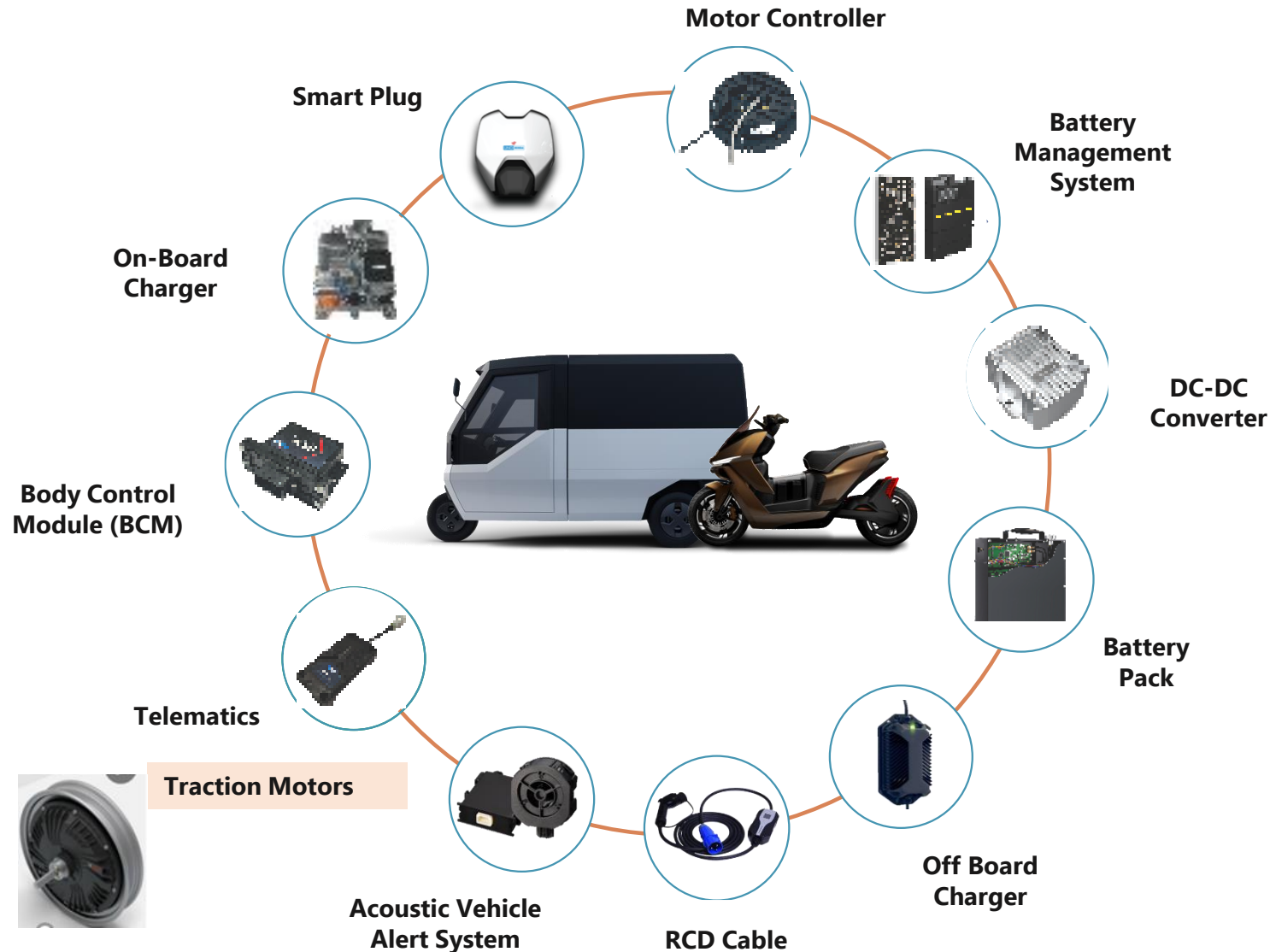
France (Epernon)	
Italy (Turin)	
Spain (La Carolina)	
Germany (Ettlingen/Konzell, Munich, Reutlingen)	

Asia (w/o India)

Indonesia (Karawang)	
Taiwan (Tainan)	
Thailand (Bangkok)	
Vietnam (Vin Phuc)	
Japan (Nagoya)	

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

Low Voltage EV Products (48V to 96V)



Products under Production and supply

- Battery Management System (BMS)
- On Board Charger
- Off Board Charger
- RCD Cable
- Body Control Module
- Smart Plug
- Telematics

Orders received, SOP in H1 FY24

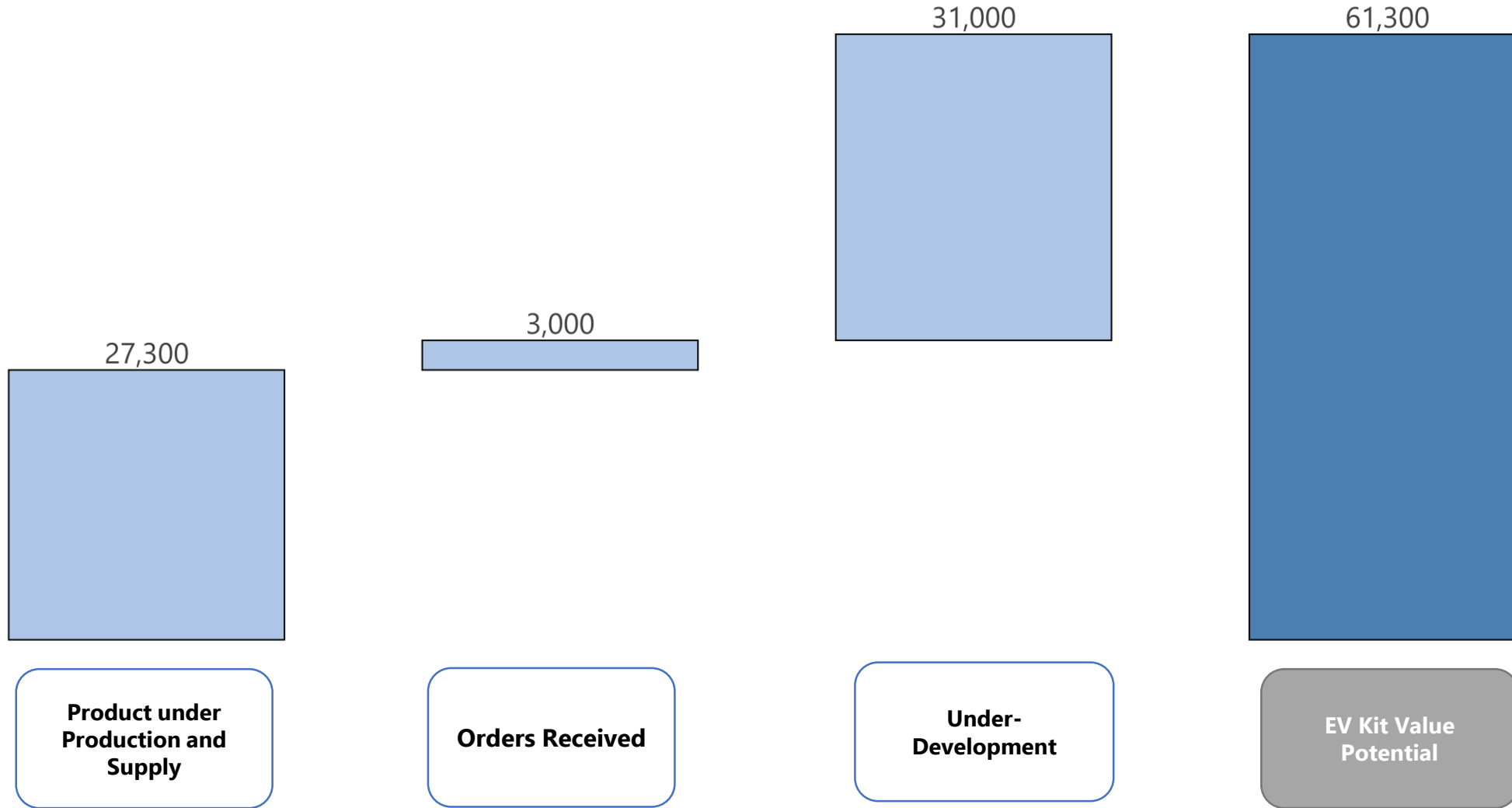
- Motor Controllers
- DC-DC Converter

Under Development

- Traction Motors**
- Battery Packs
- Acoustic Vehicle Alert System (AVAS)

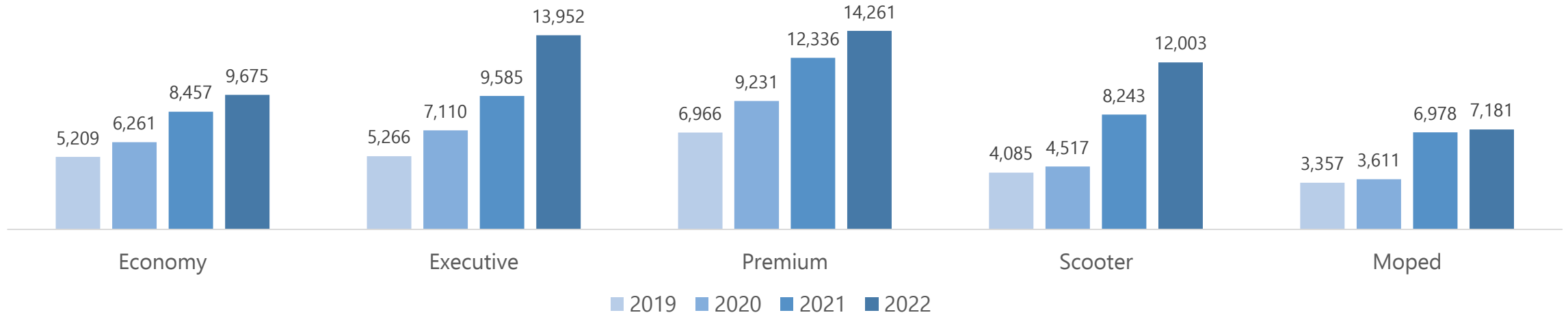
POTENTIAL EV KIT VALUE (2W & 3W)

Values in INR

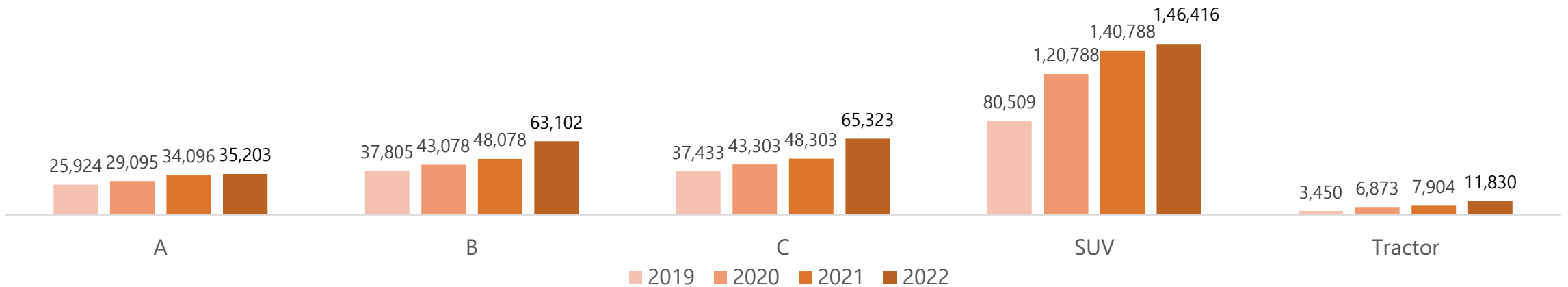


Kit Value - UNO MINDA

Kit Value – 2 Wheelers



Kit Value – 4 Wheelers



Environment, Social and Governance (ESG) Initiatives



Environmental

- Group has taken various initiatives which are expected to have environmental benefits and reduce operational costs
- Roof-top solar installation- Installed 9.27 MW rooftop solar cells across 23 plants- ~10% of power requirement of the Group
- Solar Open access renewable energy- 13.59 MW capacity across 06 plants (in Maharashtra & Tamilnadu)
- Green belt plantation drive- ~40% green area for new plants
- Many energy efficiency projects implemented i.e. Electronic Commutated Blowers in AHU's, VFD installation, APFC panels, LED lights, WHRS installation, Conversion of furnaces from HSD to PNG etc.



Mindarika Pune



Minda Kosei Bawal



Social

- Vision to enable and empower every member of the society particularly the disadvantaged to live with dignity and happiness
- Samarth - Jyoti was started in 2012 under the aegis of Suman Nirmal Minda Charitable Trust to engage and empower the underprivileged people in the rural areas through education, vocational training and skills enhancement programs which has supported over 150 Self Help Group (SHGs) so far.
- Supported nearby govt. schools and aganwadi with infrastructure development.
- Providing short term courses to women in the area of Beautician, Computer training and Cutting & Tailoring.



S.L Minda Memorial Hospital,
Bagla – Haryana



The Suman Nirmal Minda School
(TSNMS), Near Detroj, Gujrat



Corporate Governance

- Mission to continually enhance the stakeholders' value through global competitiveness while contributing to society
- Corporate Governance framework ensures effective engagement with our stakeholders and which help us to evolve with changing time
- Corporate Governance focusses on appropriate size & mix of Board, formation of various Board Committees, etc.
- More than half of the composition of board is held by Independent Directors reflecting our commitment towards ensuring governance of highest order



Uno Minda Covid Care Center,
Gurgaon



Uno Minda Covid Care Center,
Gurgaon



DRIVING THE NEW

THANK YOU.

Corporate Office

Uno Minda Ltd
(Formerly known as Minda Industries Ltd)

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