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National Stock Exchange of India Ltd.	BSE Ltd.
Listing Deptt., Exchange Plaza,	Regd. Office: Floor - 25,
Bandra Kurla Complex, Bandra (E),	Phiroze Jeejeebhoy Towers,
Mumbai - 400 051	Dalal Street, Mumbai-400 001.
NSE Scrip: UNOMINDA	BSE Scrip: UNOMINDA, 532539

#### Sub: - Investor Presentation

Dear Sirs,

Enclosed please find the Investor Presentation Q2 FY 2024.

The copy of the aforesaid Investor Presentation is also available on the website of the Company <u>www.unominda.com</u>

This is for your information and record please.

Thanking you,

Yours faithfully, For Uno Minda Limited

Tarun Kumar Srivastava Company Secretary & Compliance Officer

Encl: As above.

# UNO MINDA

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DRIVING THE NEW

**INVESTOR PRESENTATION** Q2 FY'24

Nov 7, 2023





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### **INDUSTRY HIGHLIGHTS**





#### Introduction of Bharat NCAP

Introduction of Bharat NCAP, with a focus on improving vehicle safety and assisting car buyers in making informed decisions, has commenced from October 1, 2023

# Passenger Vehicles demand momentum strong

Demand momentum for SUVs continues to be strong, led by multiple new launches across OEMs

2W segment also witnessed positive shifts as the festive season approaches

## Significant capacity expansion plan announced by Auto OEMs

Augurs well for auto component Industry

# Realignment in the FAME subsidy on electric 2W w.e.f. 1<sup>st</sup> June 2023

Vahan registration for e2W down by 17% at 1.81 Lakhs in Q2FY24 compared to 2.18 lakhs in Q1 FY24.





EV systems plant under FRIWO JV commissioned in Q1FY24. Supplies started, ramp-up expected in coming quarters.

Second EV systems plant under Buehler JV commissioned in August 2023. Expected to start supplies by Q4 FY24

#### To increase stake in MWTL

Board approved to increase stake in MWTL from 50% to 76%.

To cement Uno Minda as market leader in alternate fuel systems market.

#### Awarded National Intellectual Property Award 2023

Awarded n the Design registration category The National IP Award is organized by Office of Controller General of Patents, Designs & Trademark, DPIIT, Ministry of Commerce and Industry, India

## Highest ever quarterly production in 4W as well as 2W Alloy wheel

Commissioning of capacity expansions at 2W Alloy wheel,

Ramp of recently commissioned 30K 4W Alloy wheel line at Gujrat and

Robust OEM demands.

#### New Greenfield Plant of 4W Alloy Wheel

Setting up of new greenfield plant with capacity of 120,000 wheels per month The project to be executed over 5 years in three phases

#### Completed acquisition of ~ 86 acres land in Khed City Pune, other location in discussion

In discussion for acquisition of three more similar land parcel in north, west and south





# FINANCIAL INFORMATION & RECENT UPDATES

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### **KEY FINANCIAL HIGHLIGHTS FOR THE QUARTER**



Group Revenues (Including JVs and Associates) (Unaudited)



for the quarter

Consolidated Revenues increased by 26% Y-o-Y to

Rs 3,621 Cr

for the quarter

EBITDA higher by 26% Y-o-Y to Rs 402 Cr

for the quarter

EBITDA margin increased by 2 bps Y-o-Y at at 11.09%

for the quarter

2023 州

2024

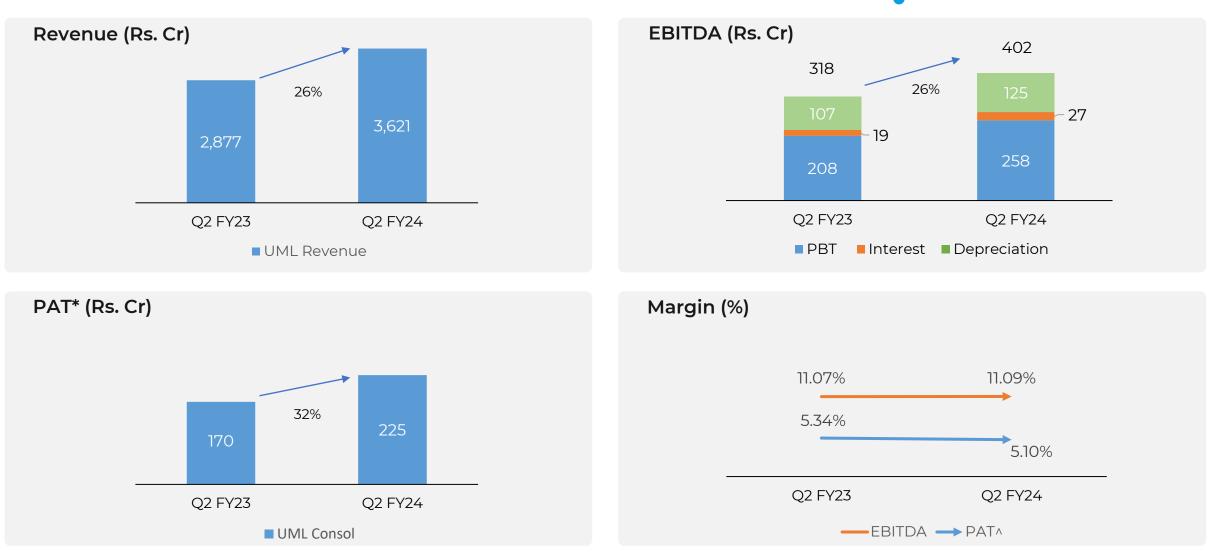
PAT (UML share) increased by 32% on Yo-Y basis to

Rs 225 Cr

for the quarter

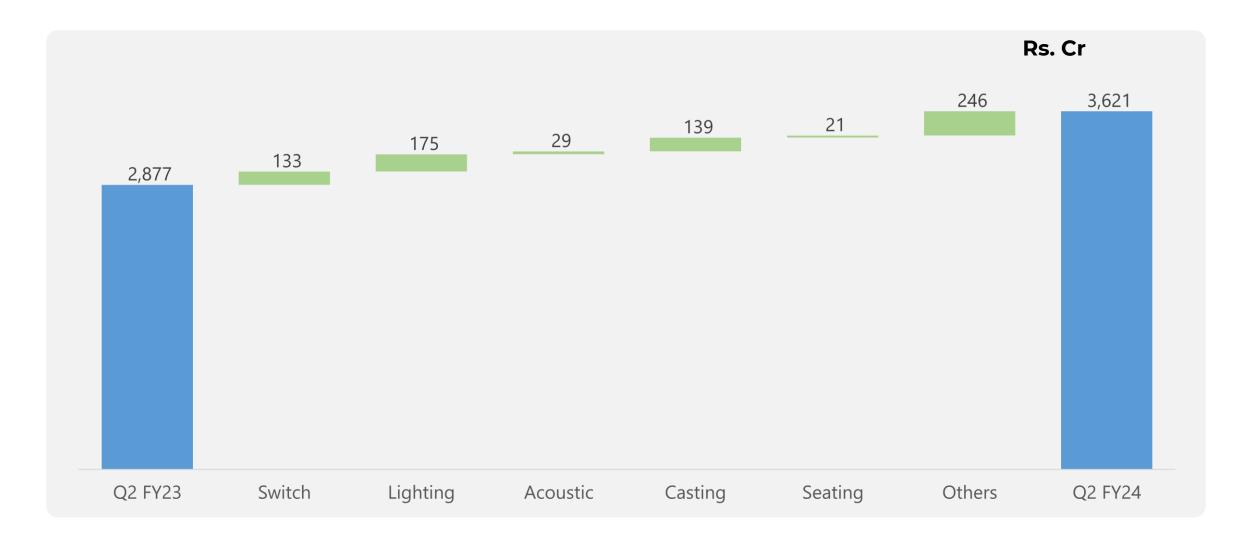
### **CONSOLIDATED FINANCIAL HIGHLIGHTS – Q2 FY24**





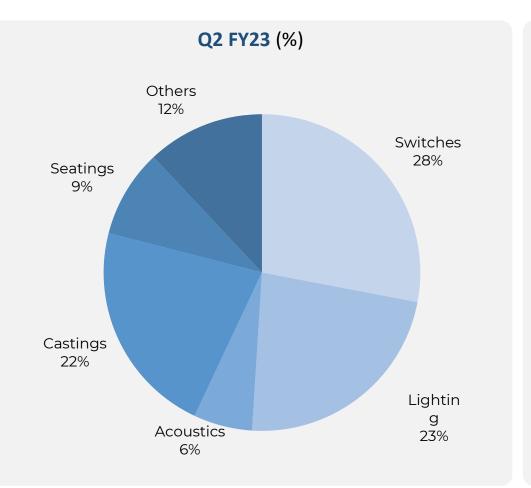


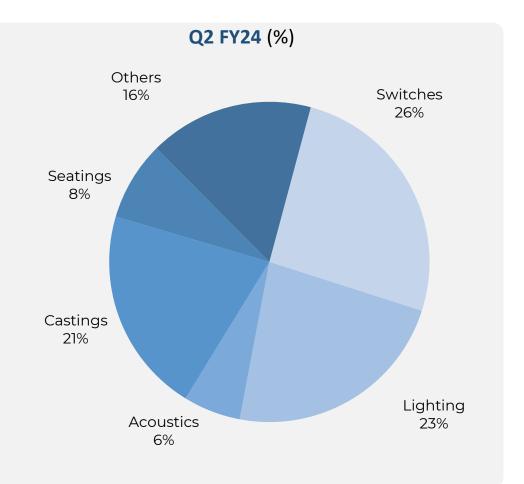
### **REVENUE BRIDGE – Q2 FY24**



### **DIVISION-WISE REVENUE MIX**

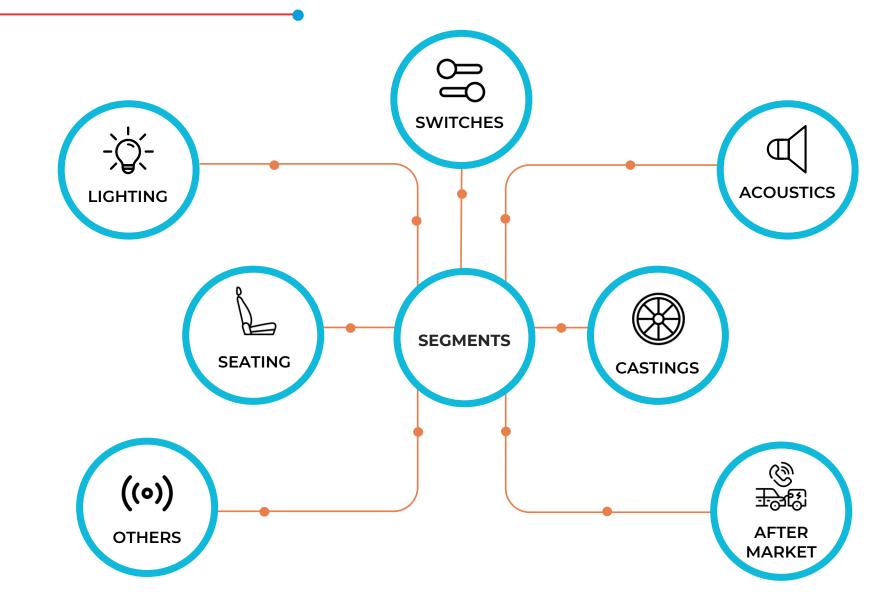






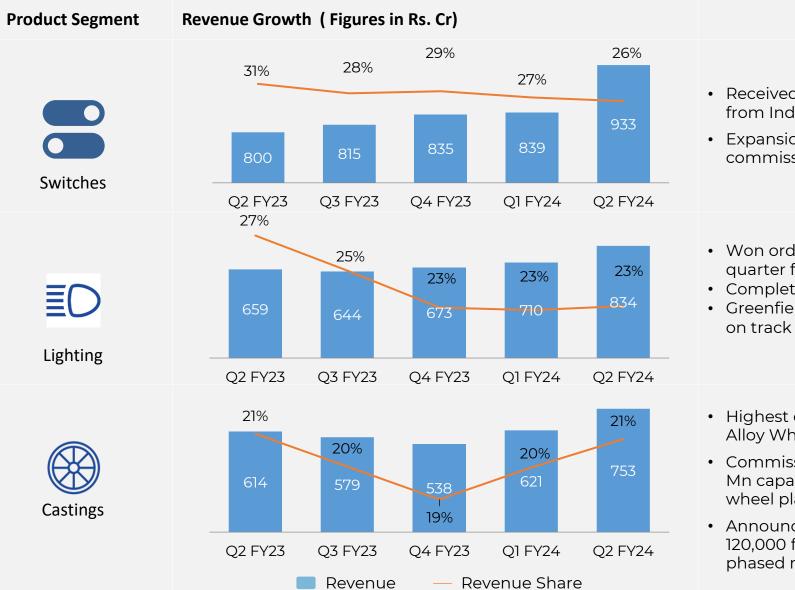
### **BUSINESS REVIEW**





### **BUSINESS REVIEW**





#### Key updates

- Received first orders for capacitive touch-based switch from Indian 4W OEM.
- Expansion of 4W switch plants at Chennai is commissioned in Oct 2023

- Won order for ambient lighting during the current quarter from Indian OEM for its EV model
- Completed expansion of lighting facilities in MIVCL
- Greenfield 4W lighting plant project at Khed City Pune on track
- Highest ever production of 2W Alloy Wheel and 4W Alloy Wheel
- Commissioned two lines aggregating to additional 1.4 Mn capacity out of total 2.0 Mn planned at 2W Alloy wheel plant at Supa.
- Announced new greenfield plant with capacity of 120,000 flow forming GDC alloy wheels per month in phased manner

### **BUSINESS REVIEW**





#### **Strategic Business Developments**

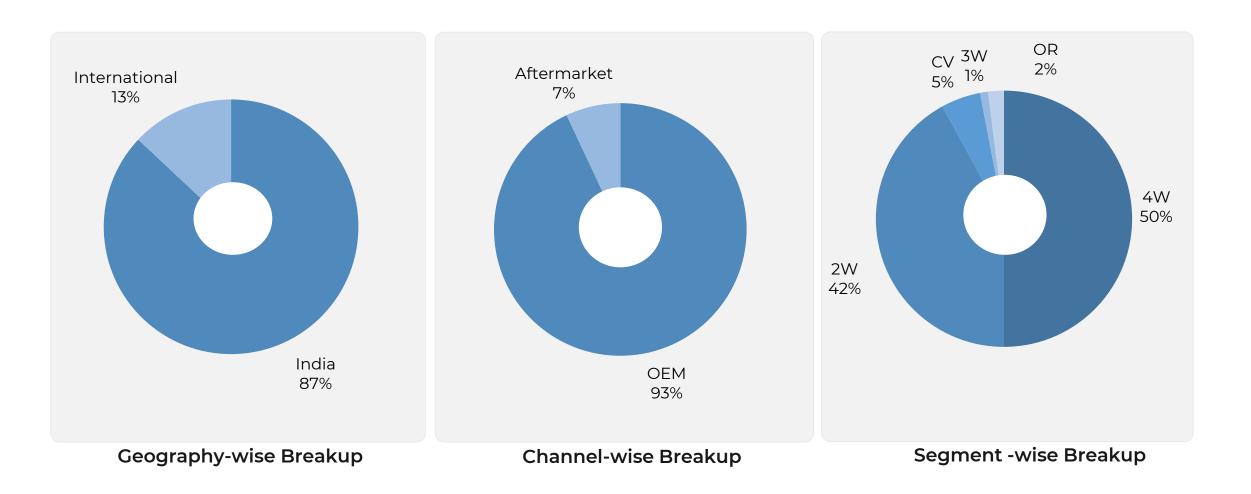
• Volumes at Clarton remain lower due to lower industry volumes.

- Started Supplies to New age EV OEM
- Export of seats steadily increasing.

- Wireless charger order from another Indian 4W OEM.
- New orders having annual peak revenue of around Rs 475 Crores from EV OEMs.. Rs 350 Crores pertains to EV Specific products comprising of Off Board chargers and DC-DC Converters



### **REVENUE BREAKUPS Q2 FY24**



### **AFTERMARKET- EXPANDING B2C BUSINESS**



#### 6,500+ SKUs

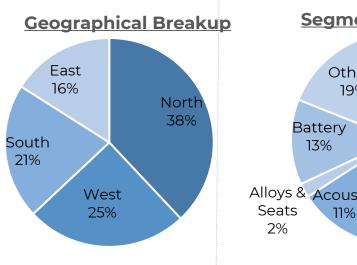
Switches, Horns, Lightings, Batteries, Filter, Indicator, Bulbs, RVMs, Braking, Shocks & struts and Accessories

150,000+

Workshops

#### **6 Export Regions**

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



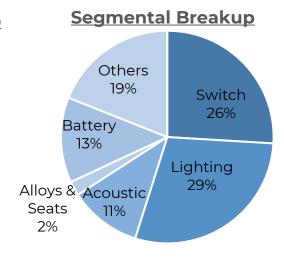
**Key Highlights** 

Revenue of Rs. 259 Cr during the quarter

Infotainment, Seating, Air Braking etc.

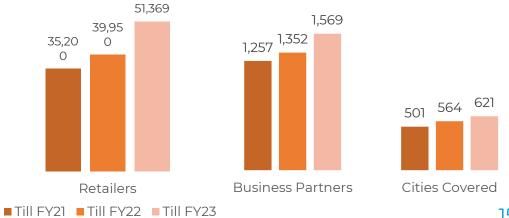
• Leadership position in major products categories

• Strong brand recall with loyal customer base



• Continuous expansion of existing Product portfolio & addition of new product lines- Alloys,





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

#### Low Voltage EV Products (48V to 96V)



# DRIVING THE **Products under Production and**

	Battery Management System (BMS)
	On Board Charger
	Off Board Charger
	RCD Cable
	Body Control Module
	Smart Plug
	Telematics
<u>Ord</u>	ers received, SOP in H2FY24
	Motor Controllers
	DC-DC Converter
	DC-DC Converter Traction Motors

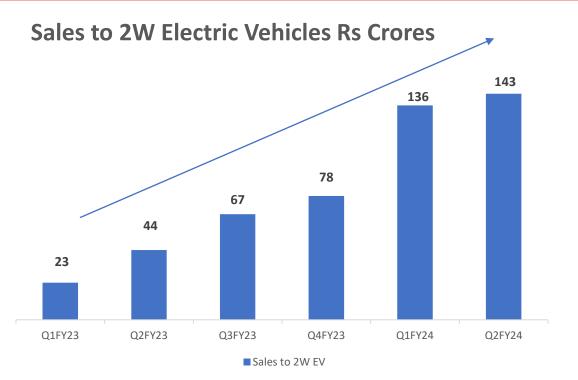
#### **Under Consideration for development**

**Battery Packs** 

supply

NEW

### **EV Sales, Order and Potential Kit Value**



#### Peak Annual Order Value from EV OEM in Rs Crores

Particulars	2W/3W	PV/CV	Total
EV Specific Components	1,440	263	1,703
Engine Agnostic Components	793	547	1,340
Total	2,234	810	3,043

#### Potential Kit Value (in INR)





### **Strategic Business Update**



#### • MSBPL Demerger and HFRL Merger with Uno Minda Ltd:

- NCLT has approved the Scheme vide its order dated 13<sup>th</sup> July, 2023.
- The order has been passed on 14<sup>th</sup> Aug 2023 & accordingly the scheme is effective from said date.

#### • Minda iConnect Pvt Ltd:

- Filed revised scheme with NCLT to give the benefit of bonus issuance
- Shareholder, Creditors and Stock exchanges have also approved the revised Scheme.
- NCLT has reserved the final order at its hearing held on 20<sup>th</sup> Oct 2023. Expected order approving the scheme to be pronounced by 15<sup>th</sup> Nov 2023.

#### • Minda Kosei Aluminum Pvt Ltd, KMA and KMM Merger with Uno Minda Ltd:

- Board approved the amalgamation scheme of all the 3 entities MKA, KMA & KMM with Uno Minda.
- NOC from Stock exchanges received on 18<sup>th</sup> Oct 2023.
- Will file 2<sup>nd</sup> notice application by 31<sup>st</sup> Oct 2023..

#### Merger of MTG with TG Minda :

- NCLT Jaipur bench has approved the merger however NCLT Delhi bench which is having jurisdiction over MTG has disallowed the order on the ground of Income tax observation.
- The Company filed appeal against the order of NCLT with NCLAT where the NCLAT passed the order in our favour
- The Company again filed the Scheme with NCLT. NCLT Delhi had hearing on 13<sup>th</sup> Oct 2023, reserved the final order of Merger. Expected pronouncement of merger order by 15<sup>th</sup> Nov 2023.



### **4Wheeler Alloy wheel Expansion**

Particulars	Description
Project	Greenfield Plant for manufacture of 4W Alloy wheel using Gravity Die casting method
Capacity	120,000 Flow forming GDC wheels per month in three phases
Rational:	<ul> <li>Immense potential for 4W Alloy wheel business as penetration of alloy wheel is gradually increasing.</li> <li>Existing capacity full to serve the growing demand</li> <li>Awarded LOI from customer for supply from this plant</li> </ul>
Project Cost	Rs 542 Crores to be incurred over next 5 years
Commissioning Timelines	60k in Q2 FY26 Remaining by Q1 FY29



Sr	Product Line	Entity	Total Cost (In Crs)	Location	Capacity	Expected SOP	l Update
1	4W Alloy Wheels	Uno Minda Ltd	542	Yet to be finalised	120k Wheel p.m.		Project announced To be spend over 5 years
2	4W Alloy Wheels	Minda Kosei Aluminum (MKA)	190	Bawal	60k Wheels p.m.	Q2 FY25	Project announced
3	2W Alloy Wheels	Uno Minda Ltd	190	Pune	2 MN Wheels p.a.		Partially commenced, Full commissioning in Q3 FY24
4	4W Lighting	Minda Industries Vietnam (MIVCL)	37	Hanoi, Vietnam	New Lighting Facility	Q2 FY24	Commenced operations
5	4W Lighting	Uno Minda Limited	400 (Phase I – 230 Cr)	Pune	New Lighting Facility	Q2 FY25	Land Acquisition completed. Construction to start To be spend over 5 years
6	4W Switches	Mindarika Pvt Ltd	73	Chennai	Brownfield expansion	Q2 FY24	Commenced operations
7	4W Switches	Mindarika Pvt Ltd	110	Gurugram	New Switch Facility	Q3 FY24	Land Acquisition completed. Construction on track
8	EV Specific	Buehler Motor JV	110	Bawal	Traction Motor Production Facility	Q4 FY24	Phase 1 Commenced To be spend over 5 years
9	EV Specific	UnoMinda EV Systems Pvt Ltd	390	Gurugram	New facility for EV specific products	Q2 FY24 Phase l	Phase 1 Commenced To be spend over 6 years



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# ANNEXURES

### **CONSOLIDATED PROFIT & LOSS STATEMENT**



Particulars (Rs. Cr)	Q2 FY24	Q1 FY24	QoQ%	Q2 FY23	ΥοΥ%	H1 FY24	H1 FY23	ΥοΥ%
Revenue from Operations (Net of Excise)	3,621	3,093	17%	2,877	26%	6,714	5,432	24%
Raw Material	2,377	1,987		1,866		4,363	3,522	
Employee Cost	449	424		365		873	706	
Other Expenses	394	352		328		746	620	
EBITDA	402	330	22%	318	26%	732	584	25%
EBITDA Margin	11.1%	10.7%	42 bps	11.1%	2 bps	10.9%	10.8%	14 bps
Other Income	9	8		16		17	26	
Depreciation	125	119		107		244	207	
EBIT	285	219	30%	227	25%	504	403	25%
EBIT Margin	7.9%	7.1%	80 bps	7.9%	-3 bps	7.5%	7.4%	8 bps
Finance Cost	27	25		19		52	36	
Profit before Share of Profit/Loss of JVs and Tax	258	194	33%	208	24%	452	367	23%
PBT Margin	7.1%	6.3%	86 bps	7.2%	-11 bps	6.7%	6.8%	-4 bps
Тах	73	44		55		117	86	
Profit before Share of Profit/Loss of JVs	185	150	33%	154	24%	334	282	23%
PAT Margin %	5%	5%	25 bps	5%	-24 bps	5.0%	5.2%	-21 bps
Share of Profit/Loss of JVs	53	30		29		84	51	
Net profit/(loss) after share of profit/(loss) of associates / JVs (A)	238	180	32%	182	30%	418	332	26%
PAT attributable to:								
- Owners of MIL	225	173	30%	170	32%	398	309	29%
- Non Controlling Interests	13	7		12		20	23	
Other Comprehensive Income	-25	-22		18		-48	23	
Total Comprehensive Income for UML	200	150	33%	188	6%	350	332	5%
TCI Margin %	5.5%	4.9%	66 bps	6.5%	-100 bps	5.2%	6.1%	-90 bps
Total Comprehensive Income for Non Controlling Interests	12	7		12		20	23	

### **CONSOLIDATED ANNUAL KEY FINANCIAL NUMBERS & RATIOS**



Particulars	Unit	FY23	FY22	FY21	FY20	FY19
Revenue	INR Cr	11,236	8,313	6,374	6,222	5,908
EBITDA	INR Cr	1,242	885	725	672	725
EBITDA Margin	%	11.1	10.6	11.4	10.8	12.3
PAT (UML Share)	INR Cr	654	356	207	155	286
Net UML profit margin	%	5.8	4.3	3.2	2.5	4.8
Net Worth	INR Cr	4,434	3,765	2,563	2,144	1,971
EPS	INR	11.4	6.3	3.7	2.8	5.5
Dividend Payout ratio	%	13.1	12	11.2	8.1	12.1
ROCE	%	19.2	15.8	13.1	13.1	21.8
Net Debt to Equity	Х	0.24	0.15	0.31	0.40	0.49
Current Ratio	Х	1.2	1.3	1.0	0.9	1.2
Debt Service Coverage Ratio	Х	3.97	2.22	2.35	3.01	10.30
Fixed Assets Turnover Ratio	Х	4.07	3.3	2.6	3.0	4.0



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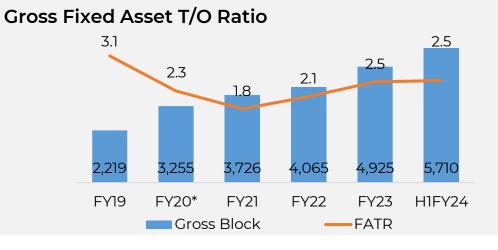
**^PAT UML Share** 

### **FINANCIAL INDICATORS**

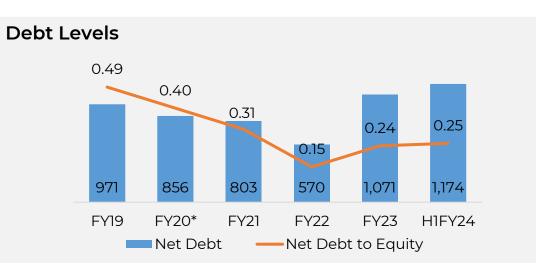


Building Shareholder Value year on year...

#### Growth without stressing the Balance Sheet...



#### **Dividend Profile** 13.2% 12.1% 12.0% 11.2% 8.1% 155 207 286 356 653 FY19 FY22 FY20\* FY21 FY23 PAT^ Dividend Payout Ratio



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



# ABOUT UNO MINDA

### TRANSFORMING THE PRESENT, REIMAGINING THE FUTURE.

### **ABOUT UNO MINDA**





#### 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

**M** 

💪 Customer is Supreme

**Respect for Individual** 

- ner is Supreme
- Live Quality
- 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

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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)

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

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**

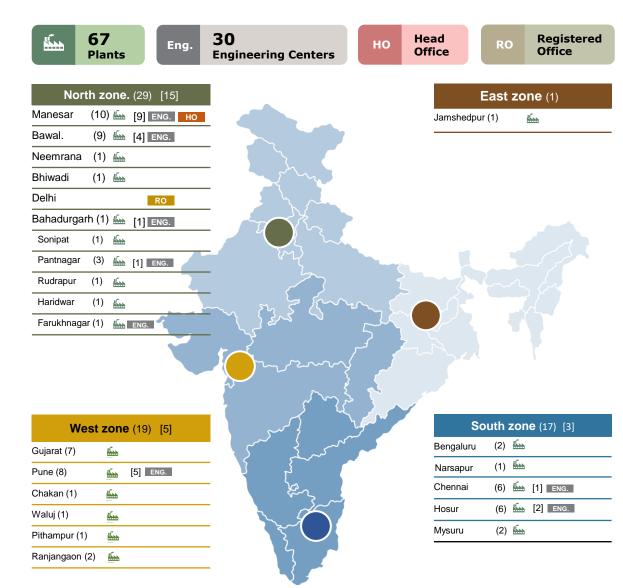


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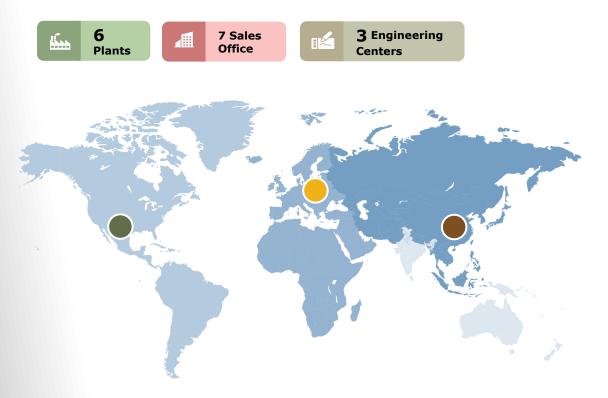
### **GLOBAL PRESENCE**



### **Strategic Manufacturing Location**



#### **Growing International Presence**



North & South America (2)					
<u>Ku</u>					
<u>Kun</u>					

<b>Europe</b> (2) [3]						
France (Epernon)		4				
Spain (La Carolina)	(1)	<u> </u>	[1]	12		
Germany (Munich, F	Reutl	lingen	) (1)	<b>Ém</b> [2]	<b>1</b>	

Asia (w/o India)	(2)	[1]
Indonesia (Karawang) (1)	<b>₩</b>	4
<b>Taiwan</b> (Tainan). [1]	4	
Thailand (Bangkok)	4	
Vietnam (Vin Phuc) (1)	<u></u>	4
Japan (Nagoya)	4	
South Korea (Pyeongtaek)	4	

### **TOP MANAGEMENT TEAM**





Mr. Nirmal K Minda Chairman & Managing Director



Mr. Ravi Mehra Deputy Managing Director & Head Group Corporate



Mr. Rajeev Gandotra CEO – Light & Acoustic Systems Domain



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



Mr. Sunil Bohra Group Chief Finance Officer & CEO- Safety & Comfort Systems Domain



Mr. Naveesh Garg CEO- Electronics and Control Systems Domain



Mr. Amit Jain Group Chief Technical Officer



Mr. Rakesh Kher CEO – Aftermarket Domain



Mr. Ashok Taneja Advisor

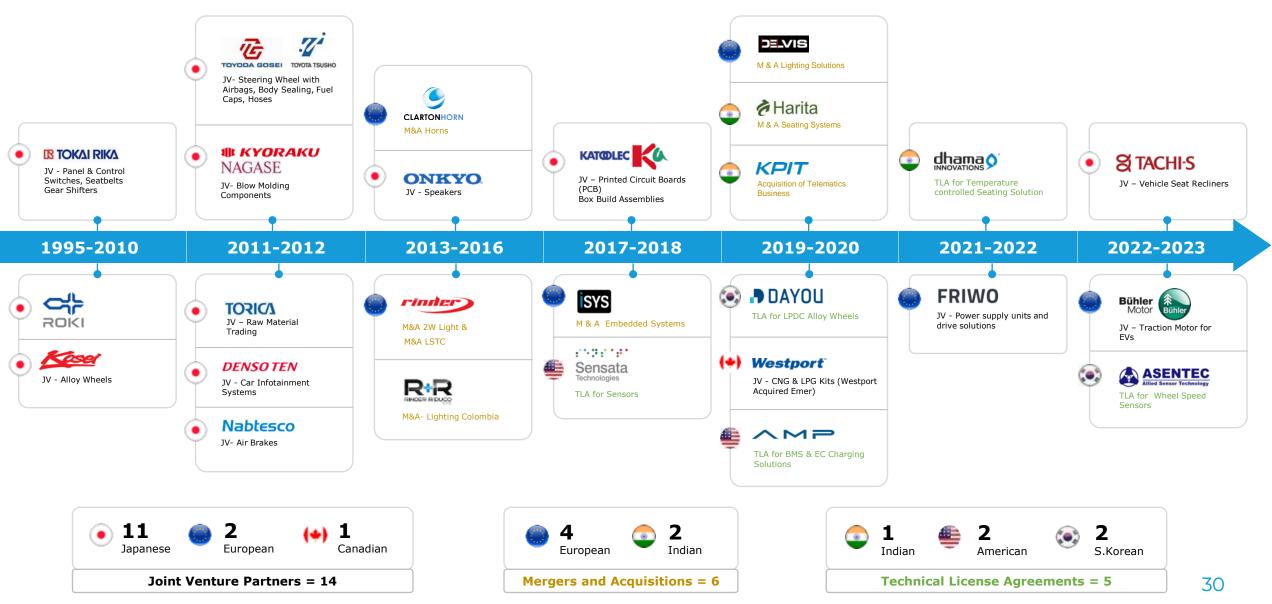


Mr. Navin Paul Advisor

### NURTURING PARTNERSHIPS AND AFFILIATIONS

DRIVING THE NEW

Legacy of successful partnerships; 25 collaborations till date.



### **GLOBAL R&D FOOTPRINTS**





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

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

400+ Engineers



75+ R&D Projects

#### PERSONALIZED -0 Wireless Chargers | CAN-enabled switch | Heat-cool seat | Lighting **AUTONOMOUS**

Cameras | Ultrasonic Sensors | Radars Driver **Monitoring System** 

Focus

#### **CONNECTED**

1022

Engineers

•**,1**[• •**,1**]• Telematics Control Unit | IoT Platform **Digital Key** 

#### **ELECTRIFIED**

Chargers | Smart Charging Plugs Converters | Inverters

C	Comp	eten	cies

- Hardware
- Software
- Mechanical
- Materials
- Optics
- Virtual Simulations
- **Functional Validation**
- **Functional Safety**
- Software define vehicles
- Test and validation

#### **Two-tier Engineering Organization**

#### **Product-focused business Engineering teams**

2W Switch, Mindarika, 4W Lighting, Minda Westport, Acoustic, Minda Nabtesco, Buehler	Manesar
Minda Kosei, Minda Kyoraku, Toyoda Gosei Minda, Minda Onkyo	Bawal
2W Lighting	Bahadurgarh
Sensor, Controller, 2W Switch, 4W Lighting, ADAS, Mindarika, 2W Lighting	Pune
Uno Minda EV Systems	Farukhnagar
Seating, Minda Kyoraku	Hosur
Minda Storage Batteries	Pantnagar
2W Alloy Wheels	Supa
Densoten	Gurgaon
Mindarika	Chennai

#### Central R&D centres with a focus on advanced & future technology

- Pune, India
- Regensburg, , Germany Uno Minda Systems GmbH
- Gurugram, India
- Munich, Germany Uno Minda Systems GmbH
- Chennai, India
- Bilbao, Spain - Light Systems & Technical Centre S.I.
- Hosur, India

#### State of art validation & test facilities





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**30** R&D & Engg Centers Globally







394 Patent Filed 381 **Design Registrations** 

### Engine agnostic portfolio with potential upside from EV transition 🖉 🛫

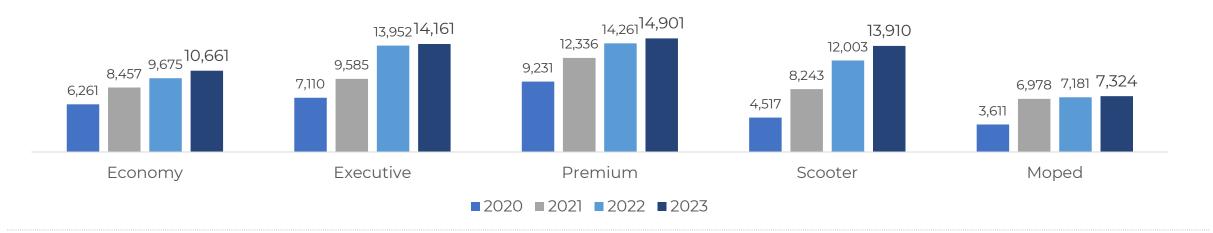
UNO	MINDA
	THE NEW-

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



### **POTENTIAL KIT VALUE – UNO MINDA**

### <u> Kit Value – 2 Wheelers</u>



#### Kit Value – 4 Wheelers



### **ENVIRONMENTAL, SOCIAL & GOVERNANCE (ESG)**

support to communities.





Skill Development

Education



Community Wellbeing



### **AWARDS & RECOGNITIONS**





"Top 50 Innovative Company Award—2022" by the Confederation of Indian Industry (CII)



"Certificate of Recognition for Excellence in Corporate Governance" in the category of "Listed - Medium Corporates"



Suman Nirmal Minda Foundation (UNO MINDA GROUP) won the "9th Annual Greentech CSR India Awards 2022" for excellent accomplishments in the category of "Promotion of Education "on 24<sup>th</sup> August 2022



GOLD AWARD for the Project "Samarth-Jyoti" in the category of "Women Empowerment" from CSR Times by Km. Pratima Bhoumik, Hon, Minister of State for Social Justice and Empowerment, Government of India



Certifications

Uno Minda is now a certified GREAT PLACE TO WORK for the time period November 2021-Nov 22



WINNER of "The AMROP-Economic Times Best Boards Award" in the Small Cap Category



### **GROUP STRENGTHS**



			DRIVING THE N
Long Standing Relationships with OEMs	<b>E</b> Located close to each customer	Strategic & Technology Driven Alliances	C Robust Systems and Governance mechanism
6 Decades of Preferred Supplier status with Major OEMs across all segments	Located in all Automotive hubs in India, Growing Global Presence	With Global Technology Leaders supporting various Product Lines	Strong System, Processes with experienced board to drive Governance and Ethical Practices
		<u> </u>	•••
	©,		
Trustworthy and Capable Supplier Base	© Strong R&D Capabilities	Extensive Aftermarket Distribution Network	Human Resources





# THANK YOU.

#### **Corporate Office**

Uno Minda Ltd (Formerly known as Minda Industries Ltd) Village Nawada Fatehpur, P.O. Sikanderpur Badda, Manesar, Gurgaon – 122004, India. For further information, please contact

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