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BOSCH LTD. INVESTOR PRESENTATION

B&K Conference May 2023

31st May, 2023 | Mumbai



Press Conference

August, 2004

Commonwealth Bank

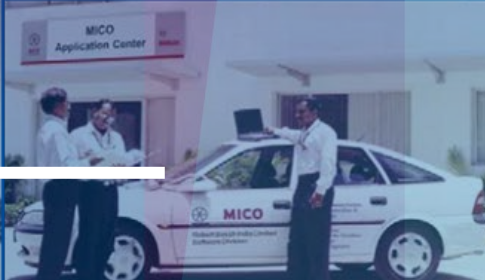
1st June, 2006

Bangalore Plant

Motor Industries Company Limited
is now
Bosch Limited.



GDC 34M
PROFESSIONAL



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Bosch Ltd. Executive Management



Guruprasad Mudlapur
Joint Managing Director &
Chief Technology Officer,
Bosch Ltd.



Karin Gilges
Chief Financial Officer,
Bosch Ltd.

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Macro Economic Impact on Business post Covid-19

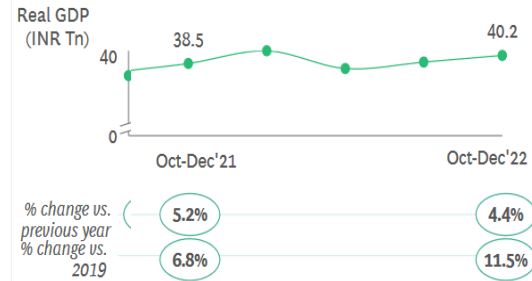
Recession probabilities across the globe, interest rate hikes



US Bank failures pose risk to growth; Indian banks healthy balance sheet



India not immune to global slowdown: Muted Growth



Global slowdown has led to export reduction for India



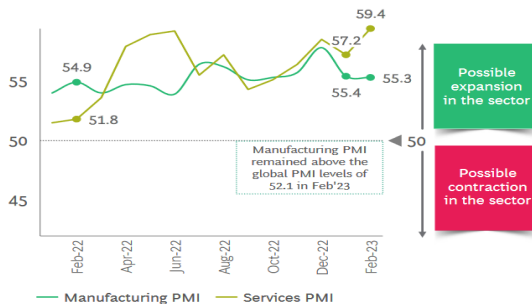
Govt. focus on Capex bodes well for India's growth



WPI and CPI eased slightly; still outside RBI's 6% band



Manufacturing & Services PMI remained in expansion



Election vs Economy

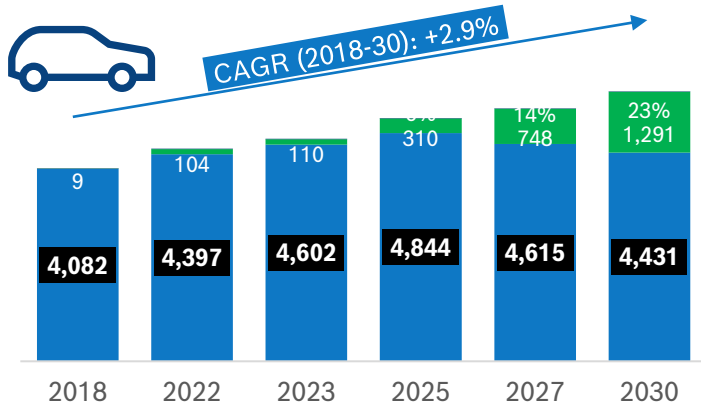


India is an Oasis in the Global Desert till now, but sandstorm is still blowing

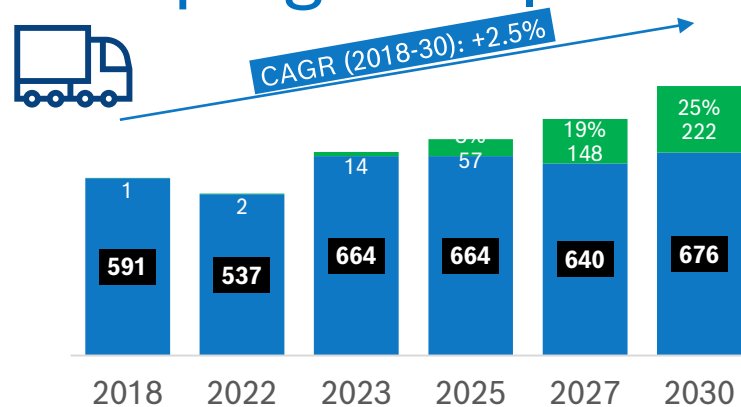
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Indian Automotive market prognosis | Mid and Long Term

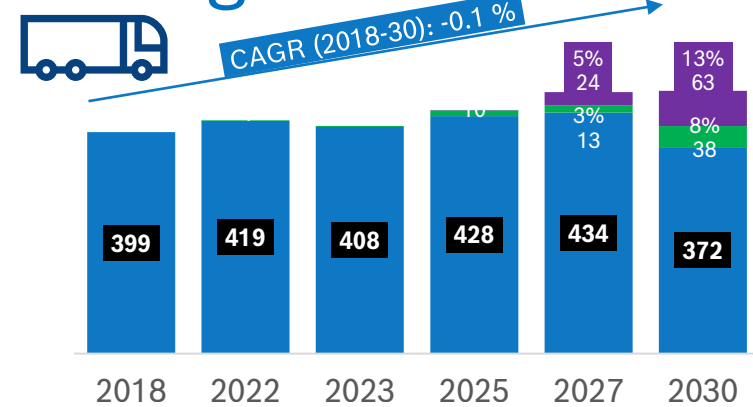
ICE Volumes in '000
EV Volumes in '000
H2 Volumes in '000



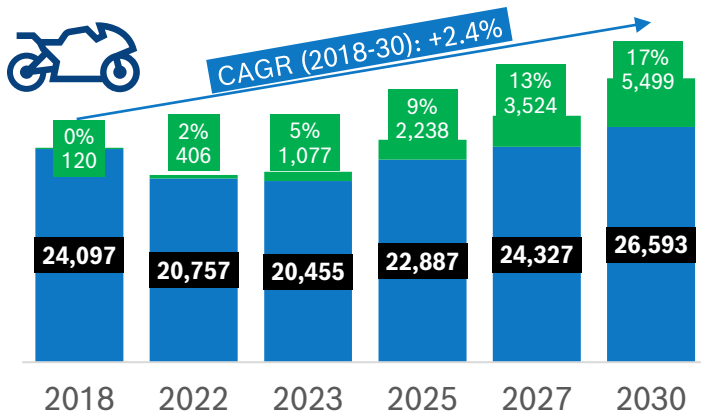
High % of BEV in 2030 driven by TCO & Infra development



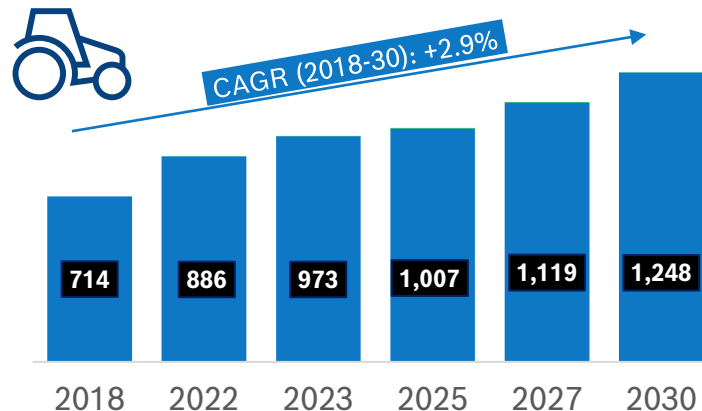
EV penetration mainly in < 2T LCVs | Last mile TCO benefit



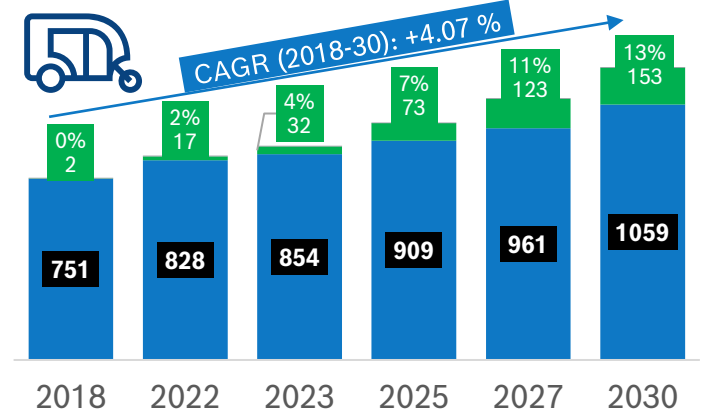
Long haul fleets will be part of the hydrogen ecosystem



EV Adoption driven by PMPs and reducing battery prices



Steady growth over long term | TREM V delay possible



EV adoption led by TCO parity and new business models

Overall market expected to grow annually at 2-3% long term

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Bosch Mobility Revenue Has Been Growing Faster Than Market

- Successful implementation of BS6-OBD2 for On-road vehicles
- Focus in execution of TREM5 for Off-HW market
- Grow in Alternate fuel technology
- Overall, Sustain market leadership in ICE business

Majority of Present Core STP of 2029 is already booked in 2022

Acquisitions are in a right direction; Majority of acquisition's (99%) are from Present Core

Businesses are equally distributed between market segments

Bosch Electrified Powertrain – Product portfolio

Our global technology and platform covers 48V to 850V

Power drive

Energy management & supply

System control

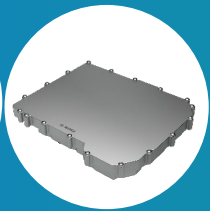
HV



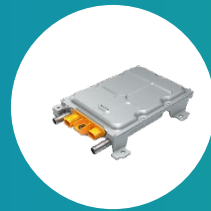
Electric Motor



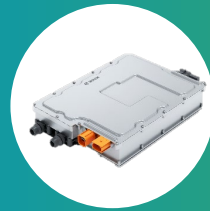
eAxles



Inverter



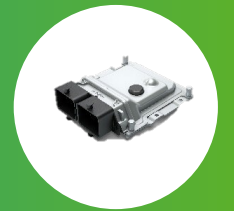
DC/DC Converter



Charger-Converter

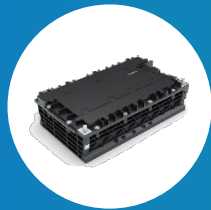


Fuel cell

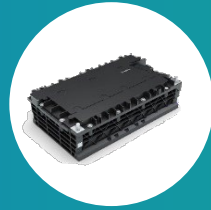


Vehicle Control Unit

48V



48V Traction Battery



48V Hybrid Battery

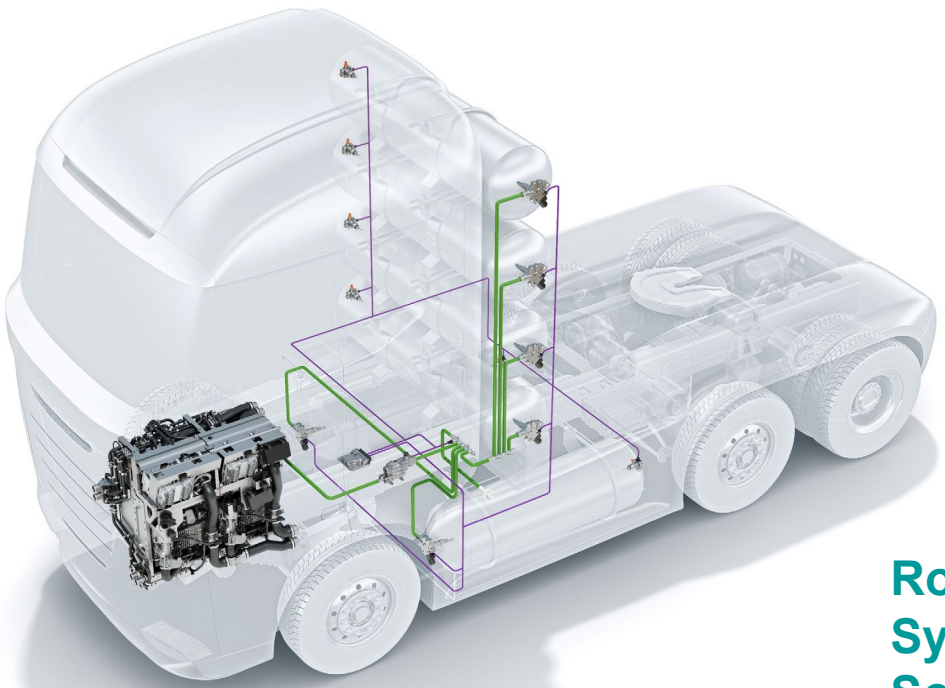


48 V – 850 V

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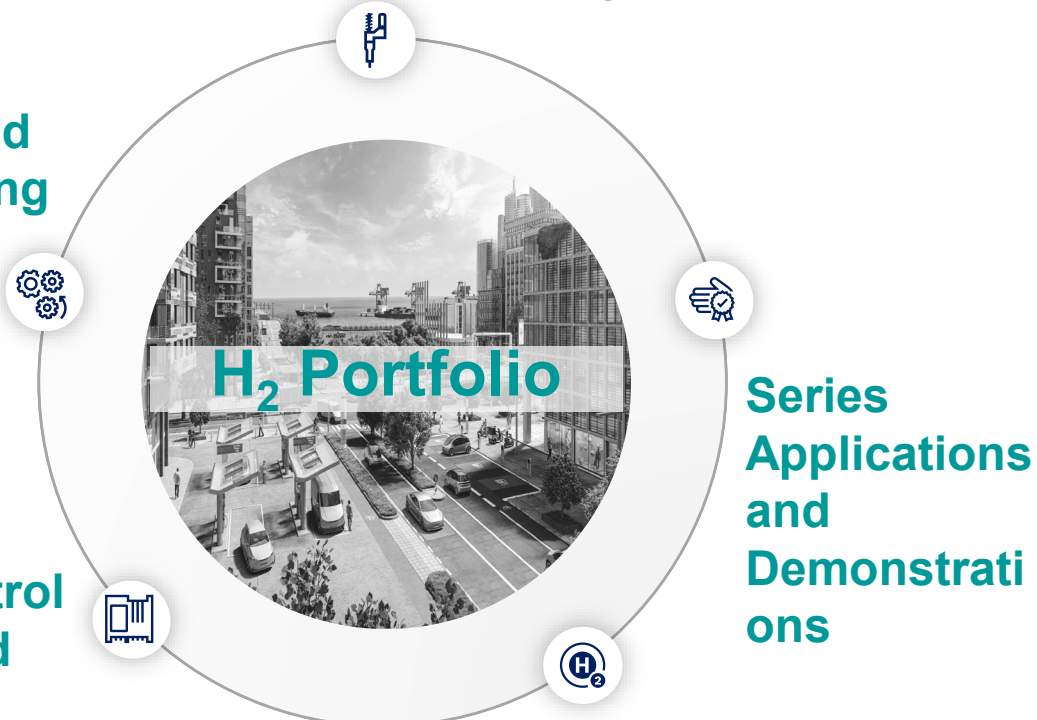
Hydrogen based Powertrain Solutions by Bosch

Complete H₂-Engine System, Fuel Cell Electric System and Tank System



End-to-End Engineering Services

Robust Control Systems and Software



Series Applications and Demonstrations

State-of-the art H₂-E and FCEV Testing Infrastructure

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Diversifying Beyond Mobility



Automotive After market

- Portfolio Expansion
- Expansion of Bosch Car Service and 2W service
- Marketplace expansion



Power Tools

- Cordless (broaden portfolio)
- eMPP (mid price point)
- Local engineering
- Retail expansion
- D2U – eShop



Building Technologies

- Focus on Localisation
- Portfolio expansion – MPP (mid price point) segment

Diversified Portfolio: Achieve ~850 m Euro Long Term

Next Up

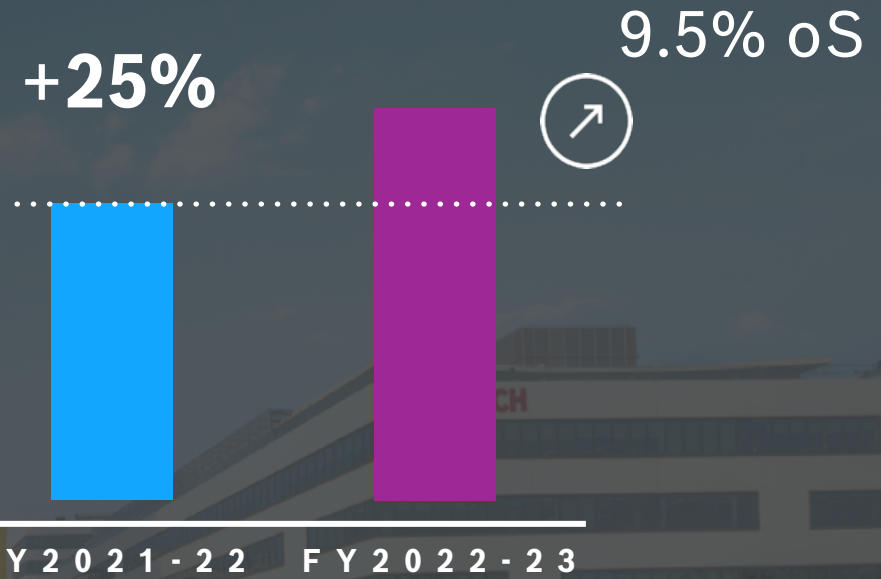
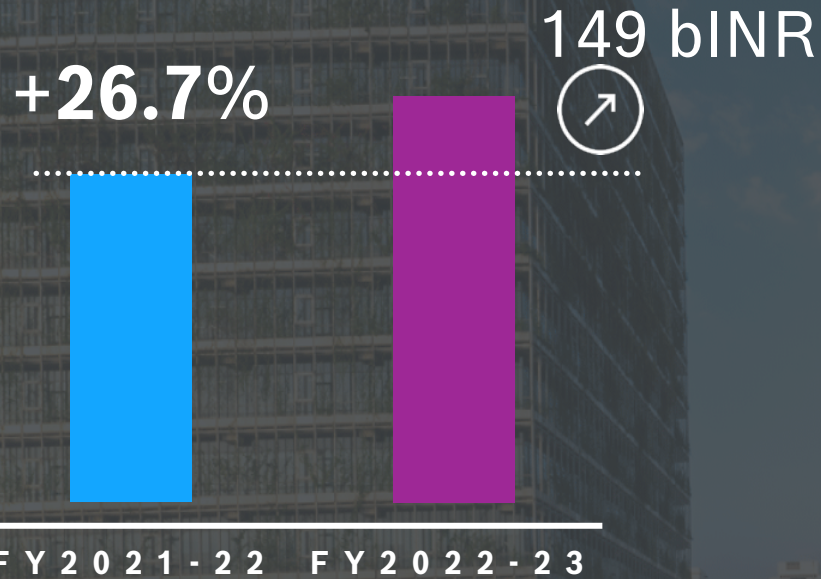


Karin Gilges
Chief Financial Officer, Bosch Ltd., India

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Review of FY2022-23: BOSCH LIMITED

Reached Highest TNS for Bosch Ltd



Research and Development cost

4.2 bINR



Capital Expenditure

6.7 bINR



Bosch Limited | Annual Investor Meet - 2023

Continue double digit growth

Outlook for 2023



Sales growth forecast more than **15%**



Research and development cost **4.8 bINR**



Driving towards healthy **EBIT margin**



Capital expenditure **4.8 bINR**



Bosch On the way to a

NEW ERA OF MOBILITY

Thank you..!