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Date : 09/08/2023

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

Sub: - Investor Presentation

Dear Sirs,

Enclosed please find the Investor Presentation Q1 FY 2024.

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

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.

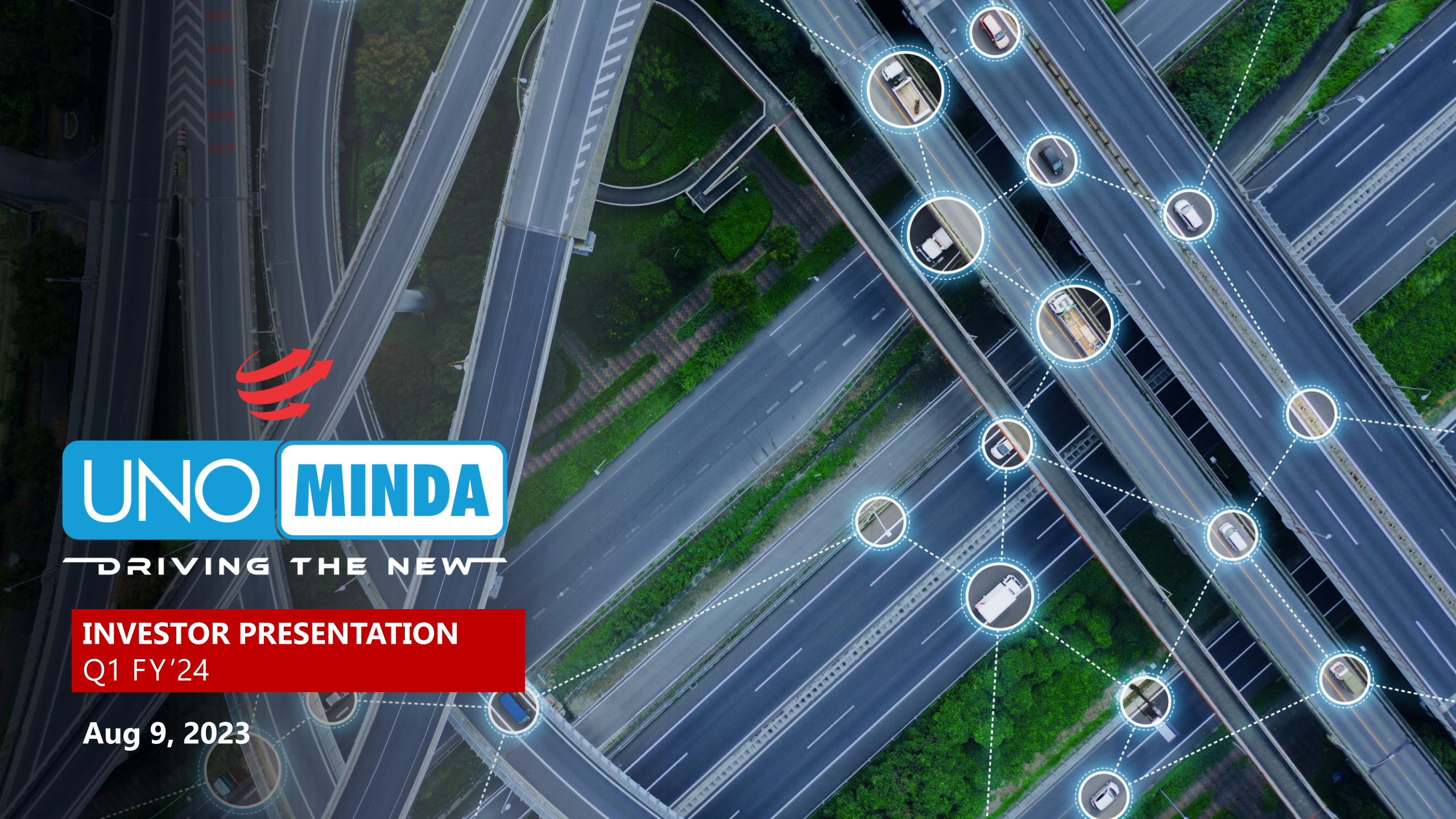


UNO MINDA

DRIVING THE NEW

INVESTOR PRESENTATION
Q1 FY'24

Aug 9, 2023



SAFE HARBOR

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Growth Momentum in Indian Economy and Auto Industry Continues

Q1FY24 GDP growth forecasted at healthy 7.9%

All vehicle segment registered YoY growth except marginal decline in CV.

Positive signals of 2W revival.

Drop in production volumes for PV on QoQ

Stabilized commodity prices and chip supplies augurs well

Chip supplies are no longer an industry-wide issue

Reasonable monsoon coupled with lowering inflation to favour auto industry growth

High interest rate still a concern

Realignment in the FAME subsidy on electric 2W w.e.f. 1st June 2023

Subsidies reduced to Rs 10,000/kwh from Rs 15,000/kwh

Further Subsidy now capped at 15% of ex factory price, substantially down from 40% offered till now.

Consequently, 2W EV OEM increase prices resulting in declines in sales by ~ 56% in June 2023

Smooth Transition to BS6 Phase 2 Norms

Auto Industry has transitioned to BS6 Phase 2 norms smoothly though there were supply concerns initially

KEY OPERATIONAL HIGHLIGHTS FOR THE QUARTER

Growth across all key product segment

Growth across all key product segment led by Lighting and Alloy wheel. Ramp up of production from New 4W Lighting plant in Gujarat supported the growth

Key Orders book continue to grow

We continue to build strong key order book for 4W & 2W Lighting, wireless chargers, infotainment as well as for EV Specific products

Consolidation of P&L of KMA and KMM

The Company has also taken management and operational control of KMA and KMM w.e.f. 1st April 2023, consequently KMA and KMM P&L is also consolidated from current quarter

Approval for scheme of arrangement of HFRL and MSBPL

NCLT approved scheme of arraignment of two wholly owned subsidiaries namely Harita Fehrer Limited and Minda Storage Batteries Pvt Ltd



FINANCIAL INFORMATION & RECENT UPDATES



KEY FINANCIAL HIGHLIGHTS FOR THE QUARTER

Revenues increased by 21% Y-o-Y to

Rs 3,093 Cr

for the quarter



EBITDA higher by 24% Y-o-Y to

Rs 330 Cr

for the quarter



EBITDA margin higher by 27 bps on Y-o-Y at

at 10.7%

for the quarter



PAT (UML share) increased by 24% on Y-o-Y basis to

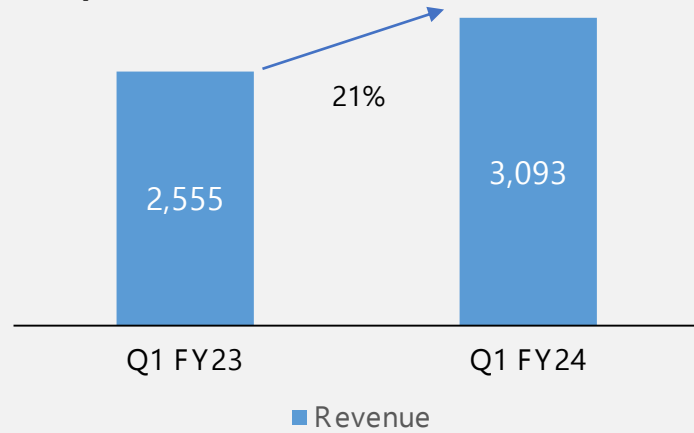
Rs 173 Cr

for the quarter

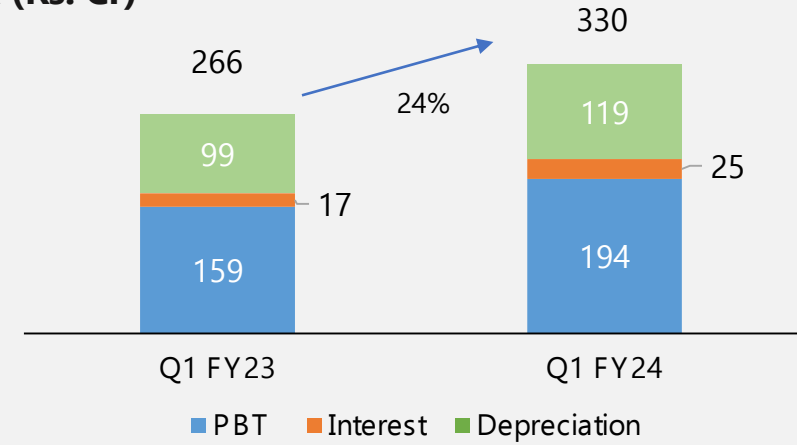


CONSOLIDATED FINANCIAL HIGHLIGHTS – Q1 FY24

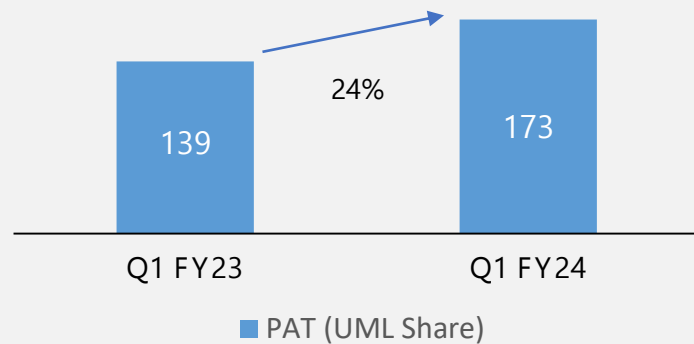
Revenue (Rs. Cr)



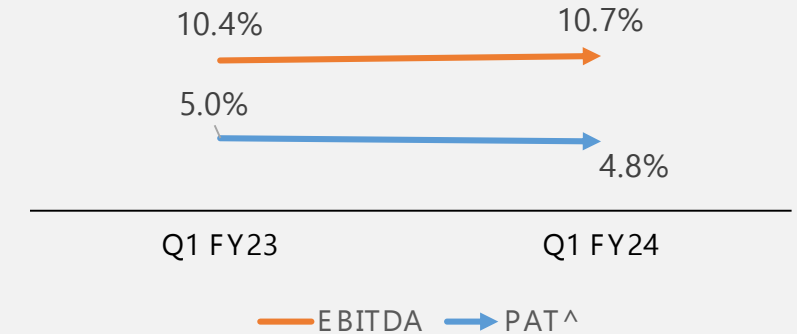
EBITDA (Rs. Cr)



PAT* (Rs. Cr)



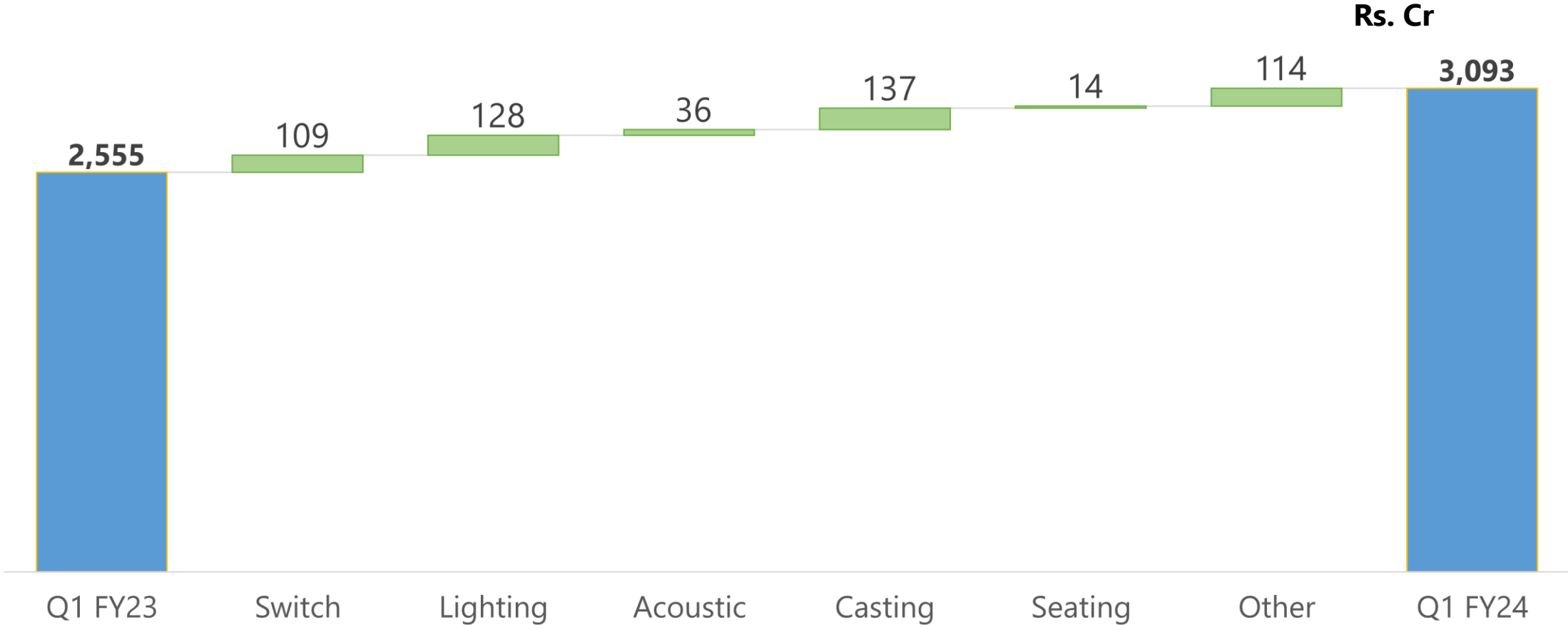
Margin (%)



*PAT UML Share

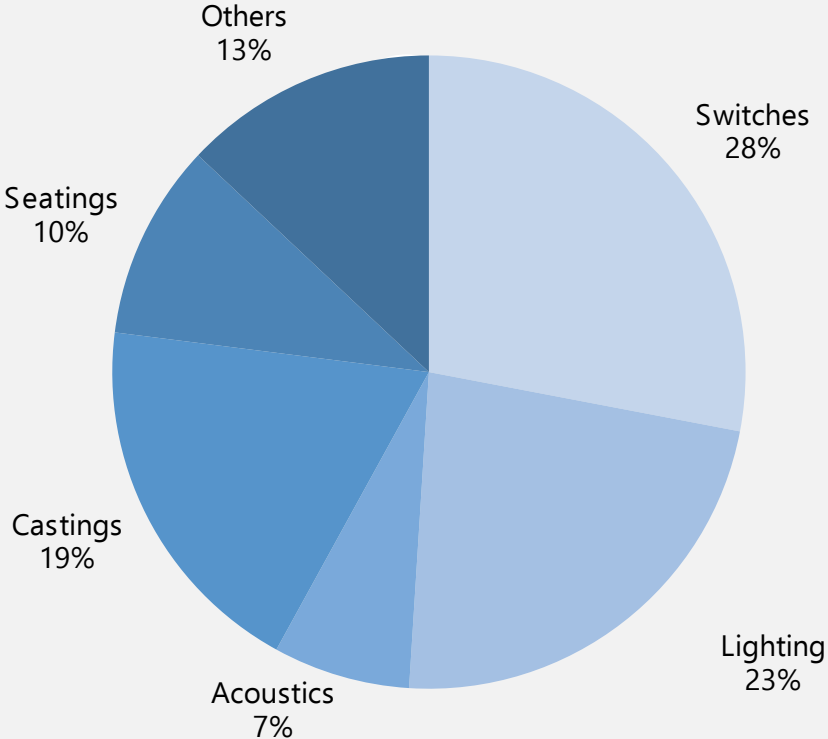
| ^PAT before profit share of JVs/ & Associates and Minority Interest

REVENUE BRIDGE – Q1 FY24

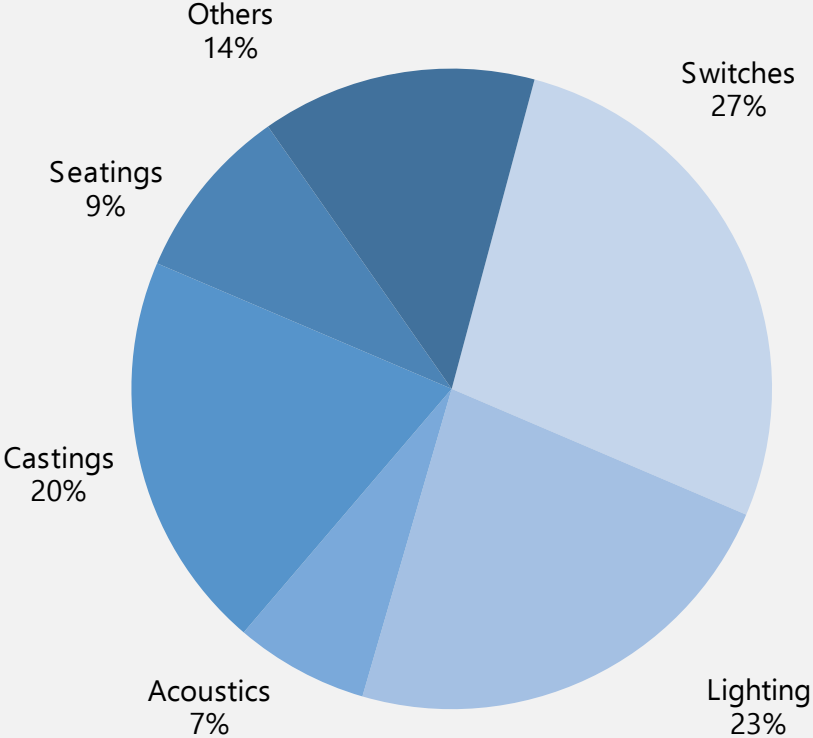


DIVISION-WISE REVENUE MIX

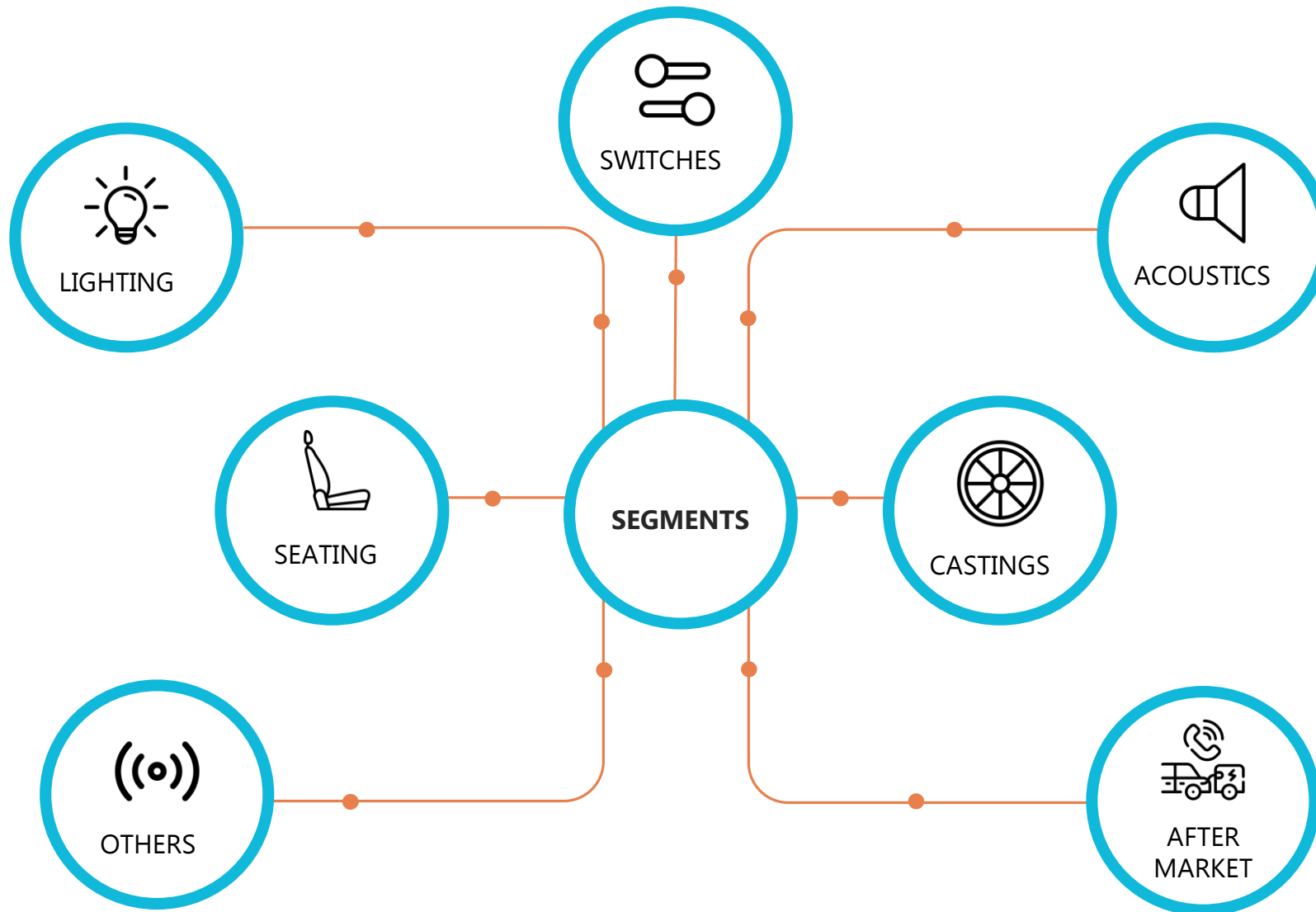
Q1 FY23 (%)




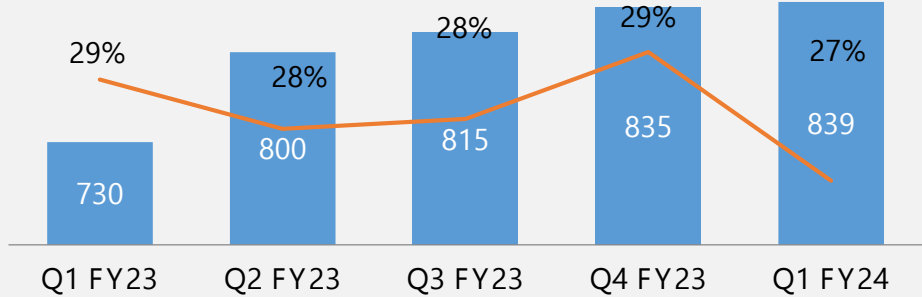

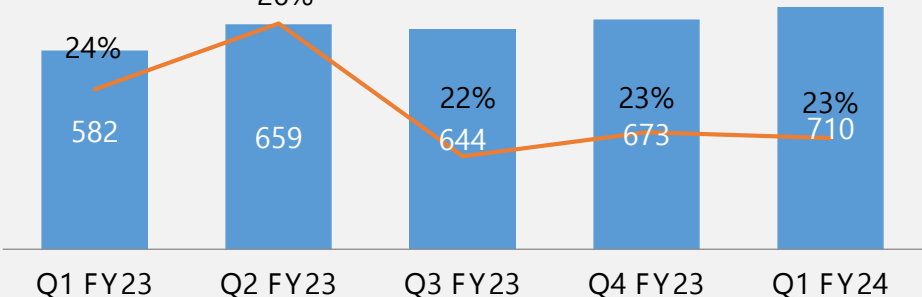

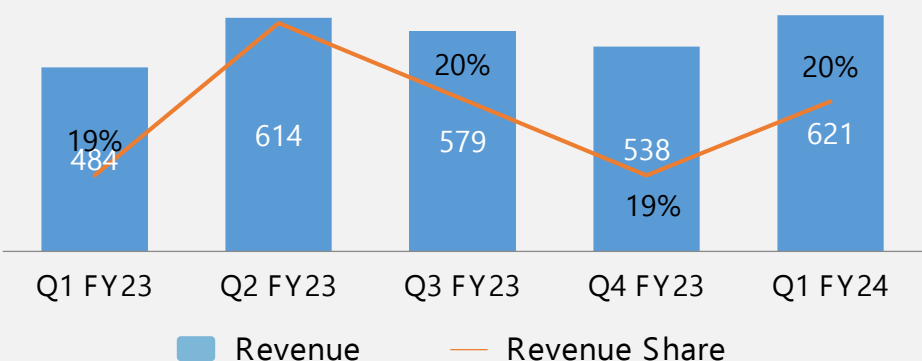
Q1 FY24 (%)



BUSINESS REVIEW


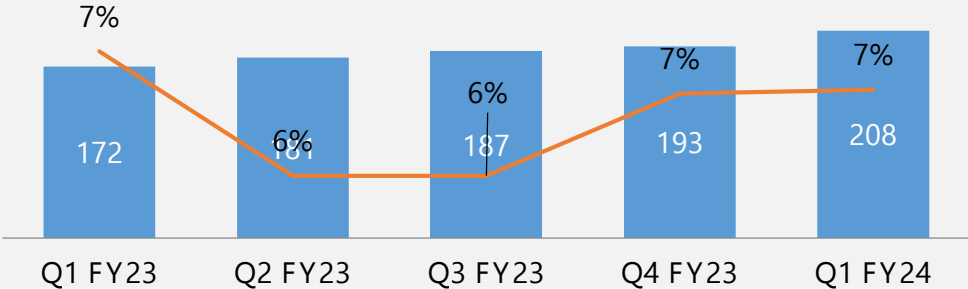

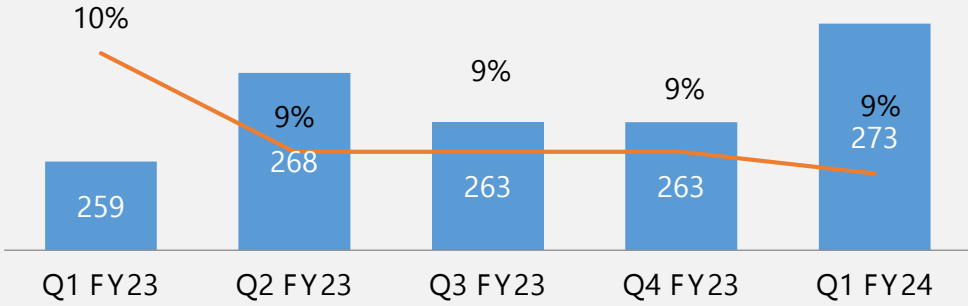

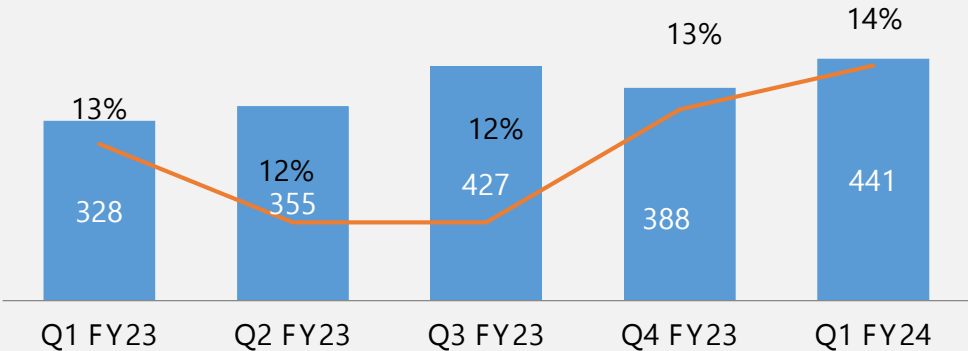


BUSINESS REVIEW

Product Segment	Revenue Growth (Figures in Rs. Cr)	Key updates																		
 <p>Switches</p>	 <table border="1"> <thead> <tr> <th>Quarter</th> <th>Revenue (Rs. Cr)</th> <th>Revenue Share (%)</th> </tr> </thead> <tbody> <tr> <td>Q1 FY23</td> <td>730</td> <td>29%</td> </tr> <tr> <td>Q2 FY23</td> <td>800</td> <td>28%</td> </tr> <tr> <td>Q3 FY23</td> <td>815</td> <td>28%</td> </tr> <tr> <td>Q4 FY23</td> <td>835</td> <td>29%</td> </tr> <tr> <td>Q1 FY24</td> <td>839</td> <td>27%</td> </tr> </tbody> </table>	Quarter	Revenue (Rs. Cr)	Revenue Share (%)	Q1 FY23	730	29%	Q2 FY23	800	28%	Q3 FY23	815	28%	Q4 FY23	835	29%	Q1 FY24	839	27%	<ul style="list-style-type: none"> Incremental order from Korean Customer Expansion of 4W switch plants at Chennai and Farrukhnagar going as per the plan and expected to commence by Q2 FY24 and Q3 FY24 respectively
Quarter	Revenue (Rs. Cr)	Revenue Share (%)																		
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Quarter	Revenue (Rs. Cr)	Revenue Share (%)																		
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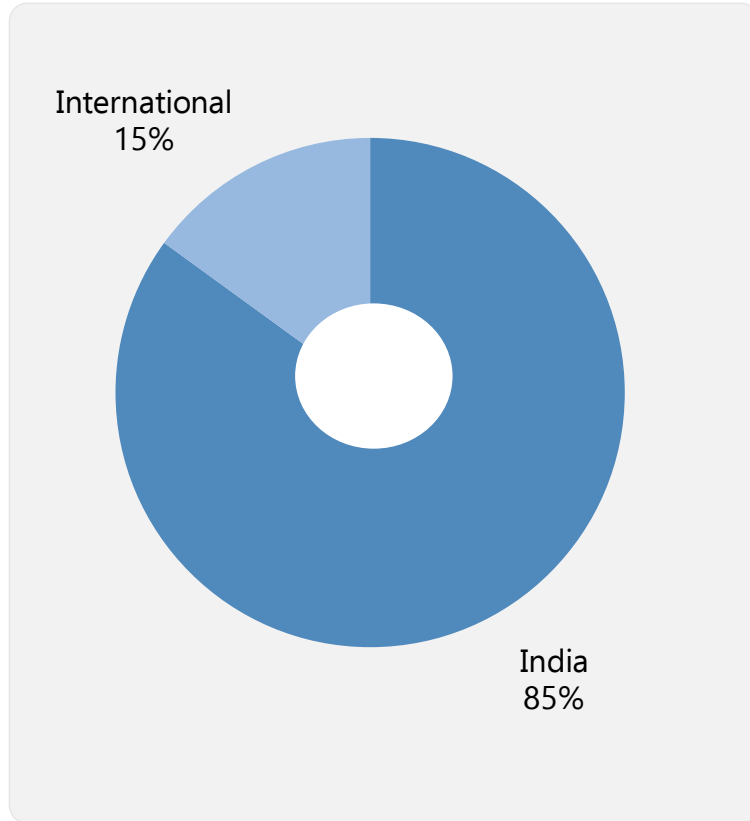
■ Revenue — Revenue Share

BUSINESS REVIEW

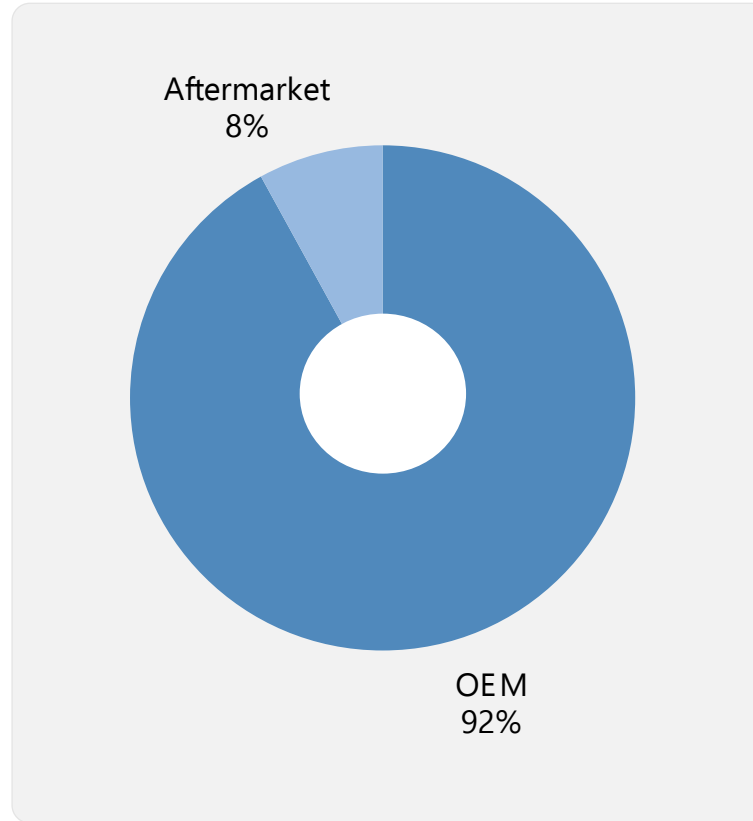
Product Segment	Revenue Growth (Figures in Rs. Cr)	Strategic Business Developments																		
 Acoustic	 <table border="1"> <thead> <tr> <th>Quarter</th> <th>Revenue (Rs. Cr)</th> <th>Revenue Share (%)</th> </tr> </thead> <tbody> <tr> <td>Q1 FY23</td> <td>172</td> <td>7%</td> </tr> <tr> <td>Q2 FY23</td> <td>181</td> <td>6%</td> </tr> <tr> <td>Q3 FY23</td> <td>187</td> <td>6%</td> </tr> <tr> <td>Q4 FY23</td> <td>193</td> <td>7%</td> </tr> <tr> <td>Q1 FY24</td> <td>208</td> <td>7%</td> </tr> </tbody> </table>	Quarter	Revenue (Rs. Cr)	Revenue Share (%)	Q1 FY23	172	7%	Q2 FY23	181	6%	Q3 FY23	187	6%	Q4 FY23	193	7%	Q1 FY24	208	7%	<ul style="list-style-type: none"> Added Korean customer in India for acoustics business for trumpet and disc horns
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■ Revenue — Revenue Share

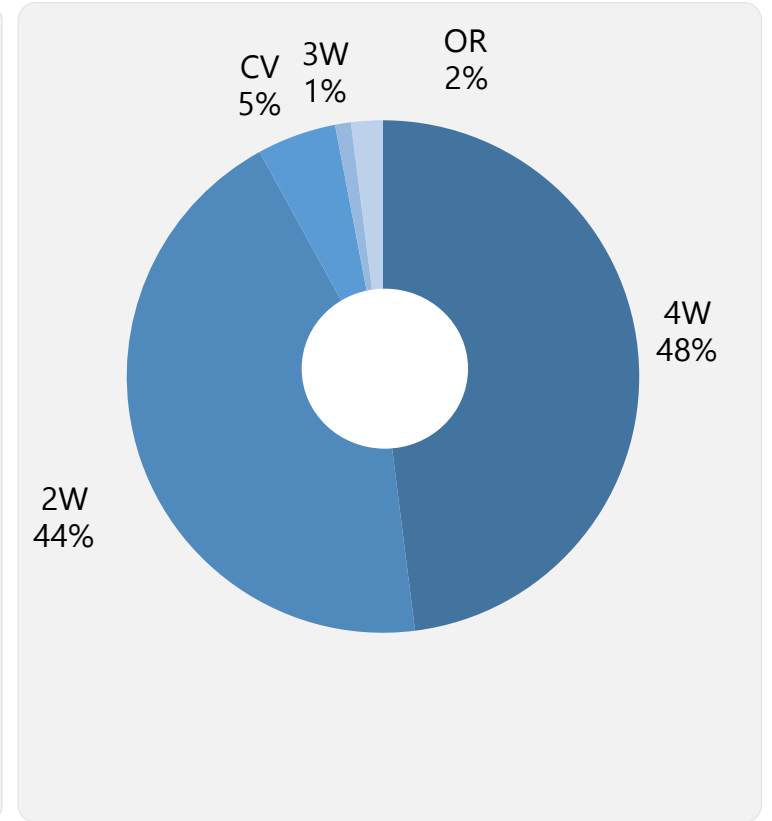
REVENUE BREAKUPS Q1 FY 24



Geography-wise Breakup



Channel-wise Breakup



Segment-wise Breakup

AFTERMARKET- EXPANDING B2C BUSINESS

Key Highlights

- Revenue of Rs. 249 Cr during the quarter
- Leadership position in major products categories
- Strong brand recall with loyal customer base
- Launched two more products in aftermarket i.e Engine Oils and Android Infotainment Systems
- 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

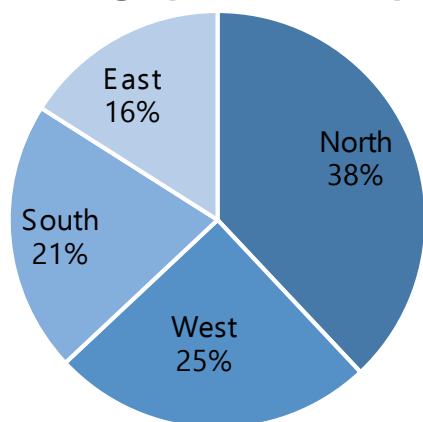
150,000+

Workshops

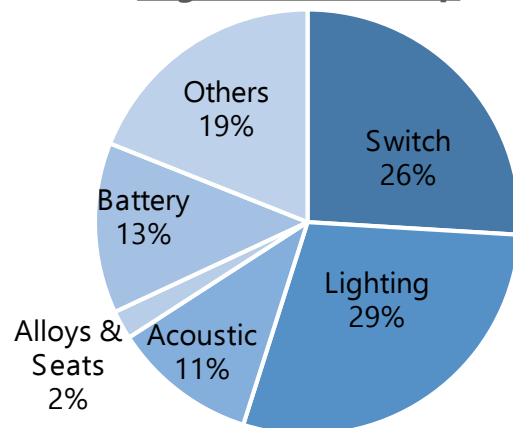
6 Export Regions

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

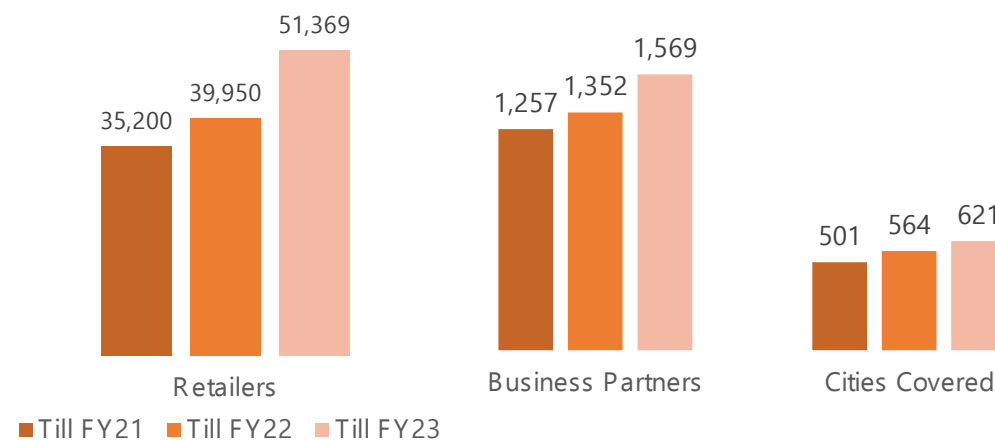
Geographical Breakup



Segmental Breakup

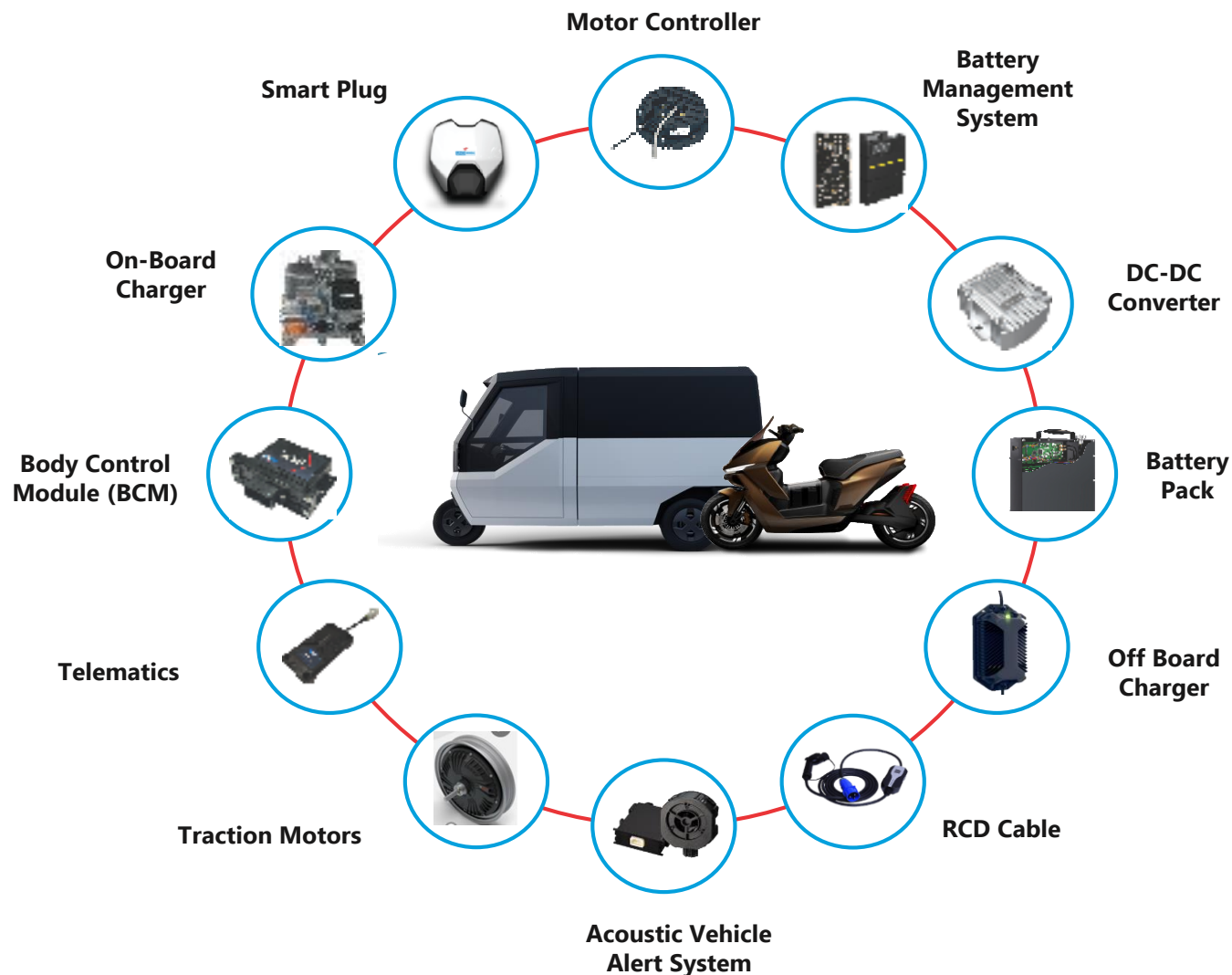


Expanding Network



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 H2FY24

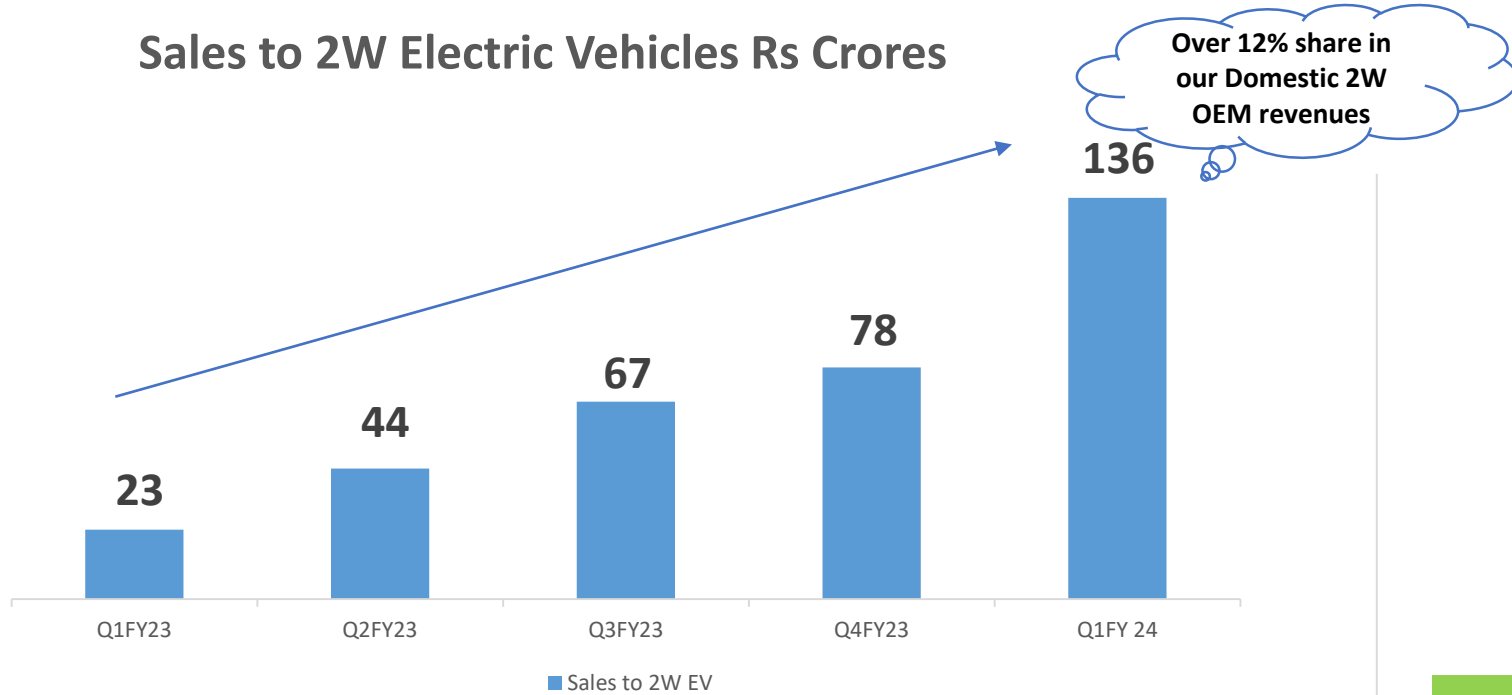
- Motor Controllers
- DC-DC Converter
- Traction Motors
- Acoustic Vehicle Alert System (AVAS)

Under Consideration for development

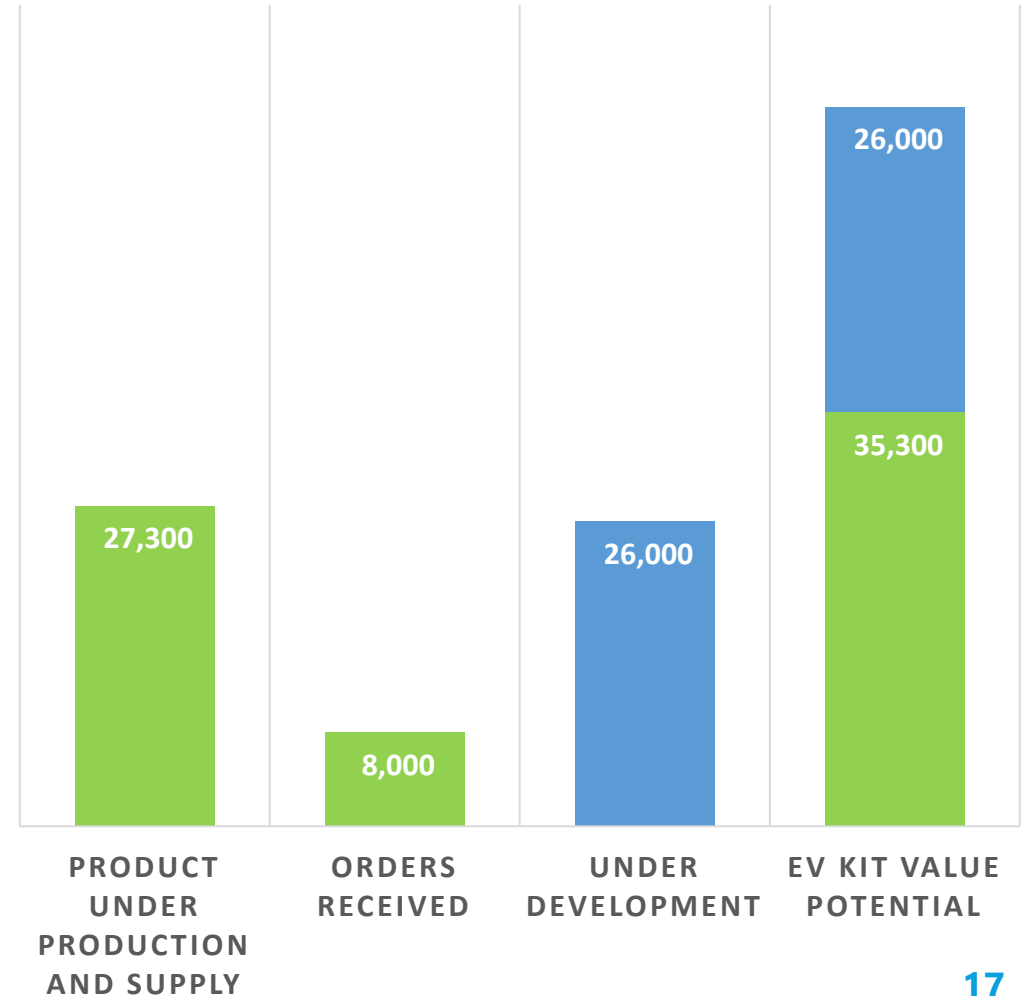
- Battery Packs

EV Sales, Order and Potential Kit Value

Sales to 2W Electric Vehicles Rs Crores



Potential Kit Value (in INR)



Peak Annual Order Value from EV OEM in Rs Crores

Particulars	2 W /3W	PV/CV	Total
EV Specific Components	1,089	263	1,352
Engine Agnostic Components	793	422	1,215
Total	1,883	685	2,567

Strategic Business Update

- **MSBPL Demerger and HFRL Merger with Uno Minda Ltd:**
 - NCLT has approved the Scheme vide its order dated 13th July, 2023.
 - Need to be filed with RoC with 30 days from Order date. Post which the scheme will be effective.
- **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 further given time to Regional Director and Income Tax to submitted their report on revised Scheme. Next hearing is on 9th August, 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 for Stock exchanges awaited.
- **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 and Matter was listed for final hearing on 10th July, 2023, however, due to waterlogging at NCLT, the Bench could not sit on the matter. Next date is yet to be confirmed by NCLT.

Capital Expansion Update

Sr	Product Line	Entity	Total Cost (In Crs)	Location	Capacity	Expected SOP	Update
1	4W Alloy Wheels	Minda Kosei Aluminum Wheels	74	Ahmedabad	30k Wheels p.m.	Q2 FY24	Commenced and under stabilisation
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.	Q2 FY24 Phase 1	Capex on track
4	4W Lighting	Minda Industries Vietnam (MIVCL)	37	Hanoi, Vietnam	New Lighting Facility	Q2 FY24	Capex on track
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	Capex on track
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 FY 24	Capex on track 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 I	Construction started To be spend over 6 years
10	Blow Moulding	Minda Kyoraku Ltd	90	Bengaluru	Blow Moulding and Paint Shop Facility	Q4 FY23	Commenced and under stabilisation



ANNEXURES



CONSOLIDATED PROFIT & LOSS STATEMENT

Figures in Rs Crores

Particulars (Rs. Cr)	Q1 FY24	Q4 FY23	QoQ%	Q1 FY23	YoY%	FY23
Revenue from Operations (Net of Excise)	3,093	2,889	7%	2,555	21%	11,236
Raw Material	1,987	1,860		1,656		7,224
Employee Cost	424	383		341		1,460
Other Expenses	352	327		292		1,310
EBITDA	330	319	3%	266	24%	1,242
EBITDA Margin	10.7%	11.1%	-38 bps	10.4%	27 bps	11.1%
Other Income	8	19		10		49
Depreciation	119	108		99		430
EBIT	219	230	-5%	176	24%	861
EBIT Margin	7.1%	8.0%	-89 bps	6.9%	19 bps	7.7%
Finance Cost	25	21		17		70
Profit before Share of Profit/Loss of JVs and Tax	194	209	-7%	159	22%	791
PBT Margin	6.3%	7.2%	-98 bps	6.2%	3 bps	7.0%
Tax	44	40		31		191
Profit before Share of Profit/Loss of JVs	150	170	-12%	128	17%	600
PAT Margin %	4.8%	5.9%	-103 bps	5.0%	-17 bps	5.3%
Share of Profit/Loss of JVs	30	24		22		100
Net profit/(loss) after share of profit/(loss) of associates / joint ventures (A)	180	194	-7%	150	20%	700
PAT attributable to:	0	0		0		
- Owners of UML	173	183	-5%	139	24%	654
- Non Controlling Interests	7	11		11		47
Other Comprehensive Income	-22	13		6		78
Total Comprehensive Income	158	207	-24%	155	1%	732

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 and systems domestically with leadership across key product segments. With **26+ Product Lines, 73+ Manufacturing facilities, over 29,300 employees, 30+R&D and Engineering Centres and 19+ JV/TLA** 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.**
- Uno Minda over the years has diversified across product divisions (Acoustics, Switches, Castings, Lighting, Seating, EV Products and others), segments (4Ws & 2Ws) and geographies (International & Domestic) and channels (replacement & OEM).
- 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 also built a strong portfolio of around 12 EV specific products for 2W/3W EV. Majority of them are already under production and supplies.
- Strong R&D focus and infrastructure helps in in-house product development and localization of products, with a team of **1022+ engineers, 394+ Patents and 381+ design registrations**, with **85+ R&D technology projects** underway
- The Company is **leading player in Automotive aftermarket with 1500+ business partners, 80,000+ Touch points across 600+ Cities in India**
- Track record of **robust financial performance and delivering strong shareholder returns**, supported by reputed promoters with rich experience and backed by professional management team.


GLOBAL & DOMESTIC PRESENCE - UNO MINDA

Strategically located plants across all major auto hubs

Overseas



 **6** Plants

 **6** Sales Offices

 **6** R&D & Engg Centers











North and South America

Mexico (Queretaro)	
Colombia (Manizales)	

Europe

France (Epernon)	
Spain (La Carolina)	 
Germany (Munich, Reutlingen)	 

Asia (w/o India)

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

India

 **67** Plants

R&D **24** R&D Centers

HO Head Office

RO Registered Office

GLOBAL R&D Footprint



1022
Engineers



30 R&D & Engg
Centers Globally



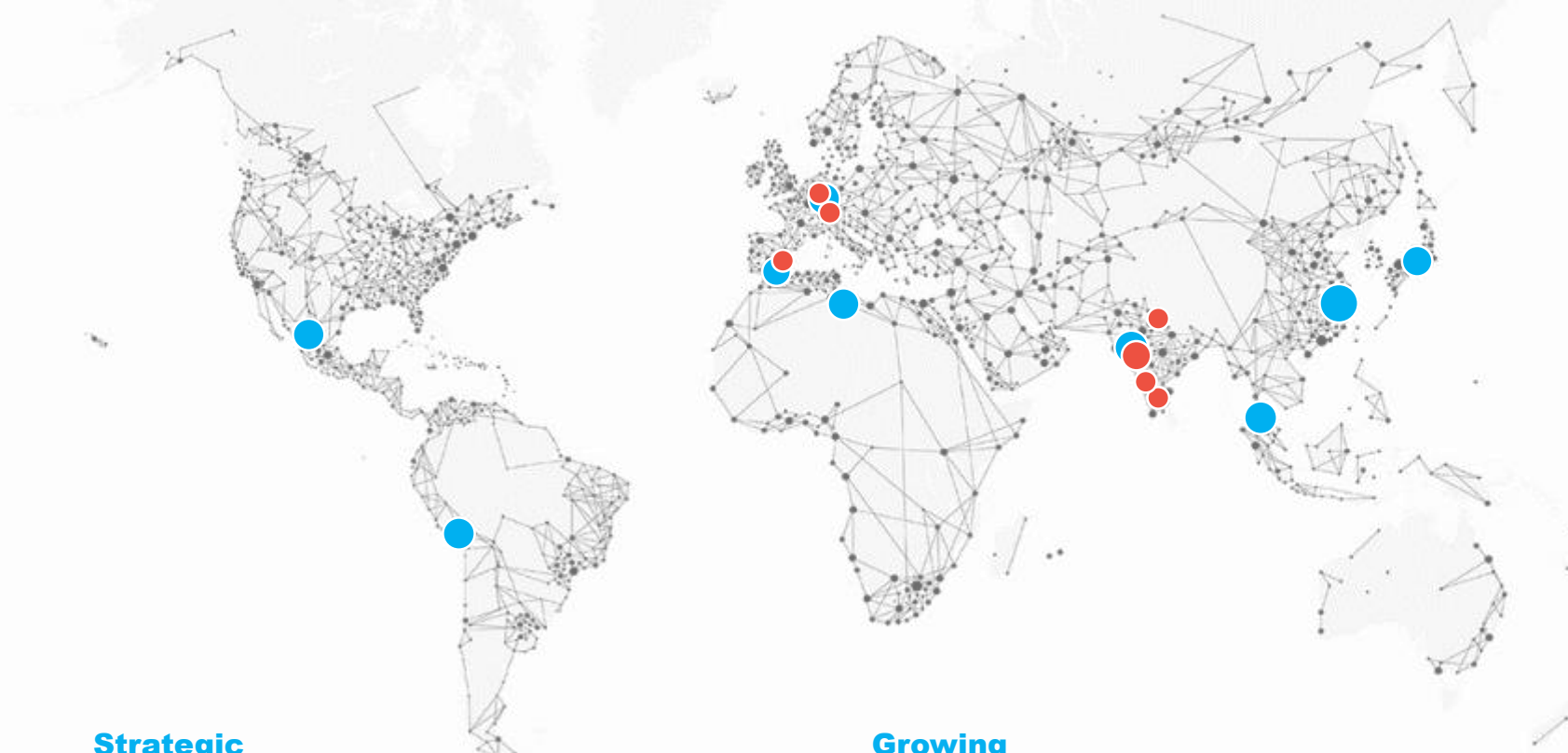
55 R&D
Technology Projects



104
Patent Granted

394
Patent Filed

381
Design Registrations



Strategic Manufacturing Location

67
Plants

Growing International Presence

6
Plants

6
R&D & Engg
Centers

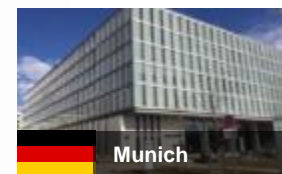
6
Sales Offices



India (4 Locations)

CREAT

- 300 Engineers**
- Embedded Electronics
 - Design Studio
 - Pune, Gurugram, Hosur, Chennai



Munich

UNO MINDA Systems GmbH

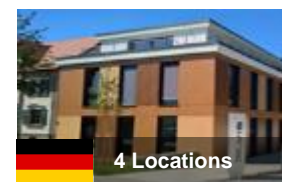
- 75 Engineers**
- Embedded Electronics
 - Engineering Services
 - 3 Locations: Munich, Regensburg and Reutlingen



Bilbao, Spain

LightSystems TECHNICAL CENTER S.L.

- 30 Engineers**
- Automotive Lighting Design



4 Locations

CREAT

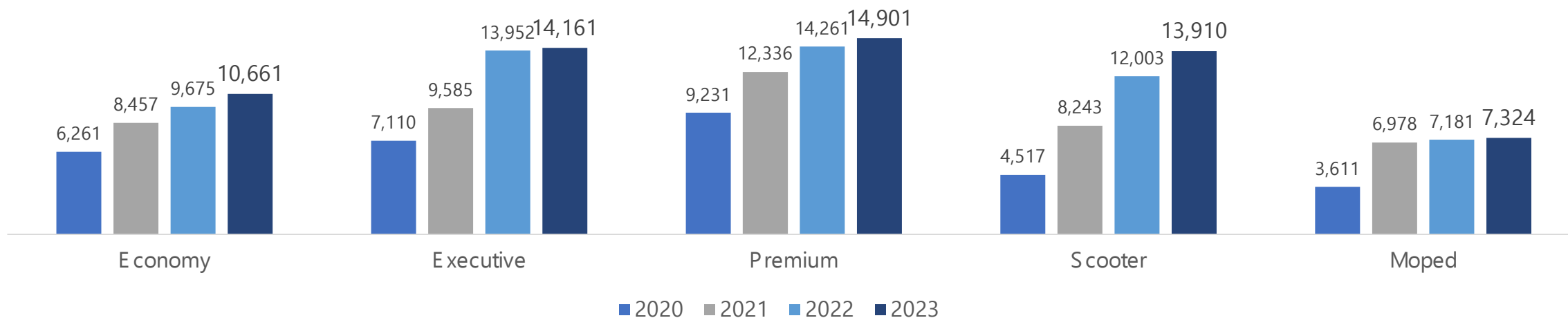
- 120 Engineers**
- Engineering Services for Lighting Systems HiL-Testing
 - Ingolstadt, Munich, Wolfsburg and Osnabrück

Engine agnostic portfolio with potential upside from EV transition

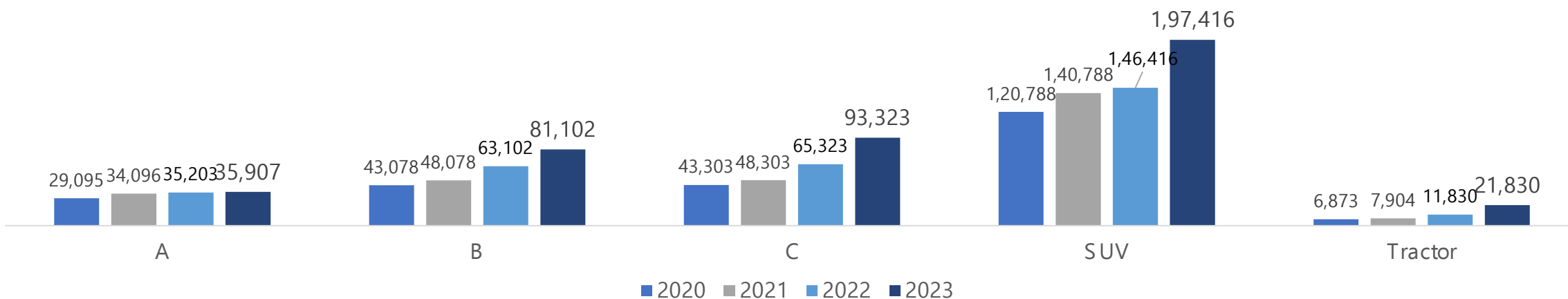
Domains	Product Lines	BS VI	EV
Electronic & Control Systems	4W Switches & HVAC	✓	✓
	Charging Sockets	✓	✓
	Sensors	✓	✓
	Actuators	✓	✓
	Controllers	✓	✓
	Seat Belts	✓	✓
	Shifters	✓	✓
	Infotainment Systems	✓	✓
	Cameras	✓	✓
	Telematics & TCU	✓	✓
	RPAS & ADAS	✓	✓
Safety & Comfort Systems	Steering Wheel with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

Potential Kit Value - UNO MINDA

Kit Value – 2 Wheelers



Kit Value – 4 Wheelers



Environment, Social and Governance (ESG) Initiatives



Environmental

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

- Water Management (Adhering to permissible water withdrawal limits, Installed STP, ETP & to implement a digital water management system)
- Waste Management (Manage all the waste in compliance with local regulations & process it through authorized recyclers)
- Energy & Emissions (13.38 MWp rooftop solar cells across 25 locations 26 MWp with the help of solar open access projects at 6 locations, reach 18% renewable energy use level by Mar 2023, use of LPG, Natural Gas, PNG & Biodiesel)



4W Switch Plant Pune



Minda Kosei Bawal



Social

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

- Community Well Being (CSR): Running multiple Schools, and Skill Centres under Suman Nirmal Minda Charitable Trust, Covid-19 support programs, Vocational Trainings, Preventive healthcare & foster homes, Self help group, Support to government schools
- Employee Well Being: Documented occupational health and safety policy, Covid care centres, "Listen to act" culture, health care, disability and invalidity coverage ,paternal leave and retirement provisions.



S.L Minda Memorial Hospital, Bagla – Haryana



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



Corporate Governance



- Policies governing our business: Adherence of regulatory compliances & Updates, Emerging workplace trends, global good practices and culture of diversity and inclusion
- Ethics & compliances: Adhere to principles of conduct, anti-corruption policies, Helpline for all stakeholders
- Economic Value Creation: Sustained economic value generation, Aim of 35% ROCE, target to market share of 30%



Certificate of Recognition for Excellence in Corporate Governance" from ICSI in 2022



ET Amrop Best Board Award 2020



DRIVING THE NEW

THANK YOU.

Corporate Office

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(Formerly known as Minda Industries Ltd)

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