



BOSCH

Bosch Limited
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Hosur Road, Adugodi
Bangalore-560030
Karnataka, India
Tel +91 80 67528626
www.bosch.in
L85110KA1951PLC000761

Corporate Relationship Department
BSE Limited
1st Floor, New Trading Ring
Rotunda Building
Phiroze Jeejeebhoy Towers
Dalal Street, Fort
Mumbai – 400 001
Scrip code:500530

The Manager
Listing Department
National Stock Exchange of India Ltd.
Exchange Plaza, C-1, Block G
Bandra-Kurla Complex
Bandra (E)
Mumbai – 400 051
Scrip code: BOSCHLTD

August 14, 2019

Dear Sir/Madam

Sub: Intimation of Schedule of Analyst / Institutional Investor Meetings

Ref: Regulation 30(6) of SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015

This is with reference to our letter dated August 09, 2019 on the captioned subject.

Copy of the presentation shared with the Institutional Investors/Fund houses is attached herewith and is also being made available on the Company's website i.e. www.bosch.in

This is for your information.

Thanking you,

**Yours faithfully,
for Bosch Limited,**

RAJESH Digitally signed by
RAJESH
DIGAMB DIGAMBAR PARTE
Date: 2019.08.14
AR PARTE 19:56:03 +05'30'

**Rajesh Parte
(Company Secretary
& Compliance Officer)**

Encl: as above

Bosch Limited Investors' Meet 2019

Moving Ahead >> Smart Moves

Soumitra Bhattacharya, Managing Director, Bosch Limited

14th August, 2019 | Mumbai



Bosch Limited – Investors’ Meet 2019

Today we talk about

Bosch Group and Bosch India Overview

Changing landscape of Mobility Sector

Integrated System Solutions

Other Businesses

Bosch India Social Engagement

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The Global Bosch Group

Bosch group: Business sectors

Sales (2018): EUR 78.5bn

Mobility Solutions



Consumer Goods



Industrial Technology



Energy and Building Technology



Highlights of the 2018 business year

Sales

€78.5bn¹



+37%

52m web-enabled products sold



Research and development

68,700

associates worldwide
+4,300



Headcount rises to

409,900

+7,700

EBIT from operations

€5.5bn

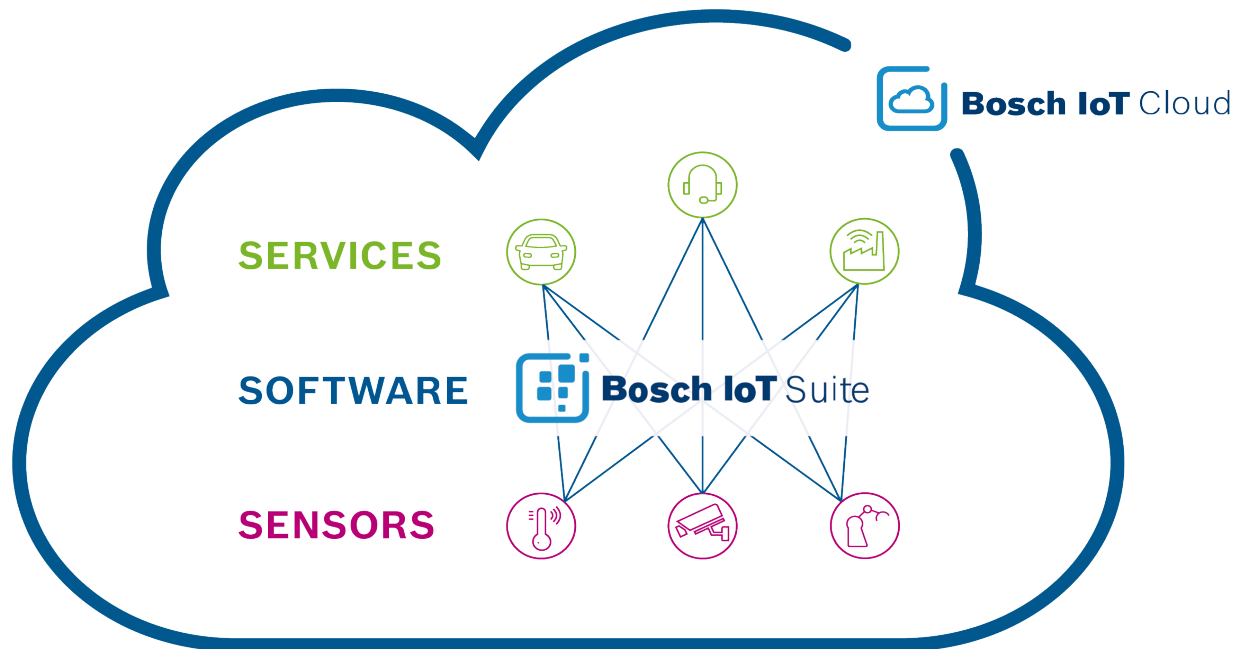
€7.3bn²

Research and development spending

¹ Adjusted for changes in consolidated group

² Calculated on the same basis as the 2017 figure

IoT: a key pillar of the Bosch strategy

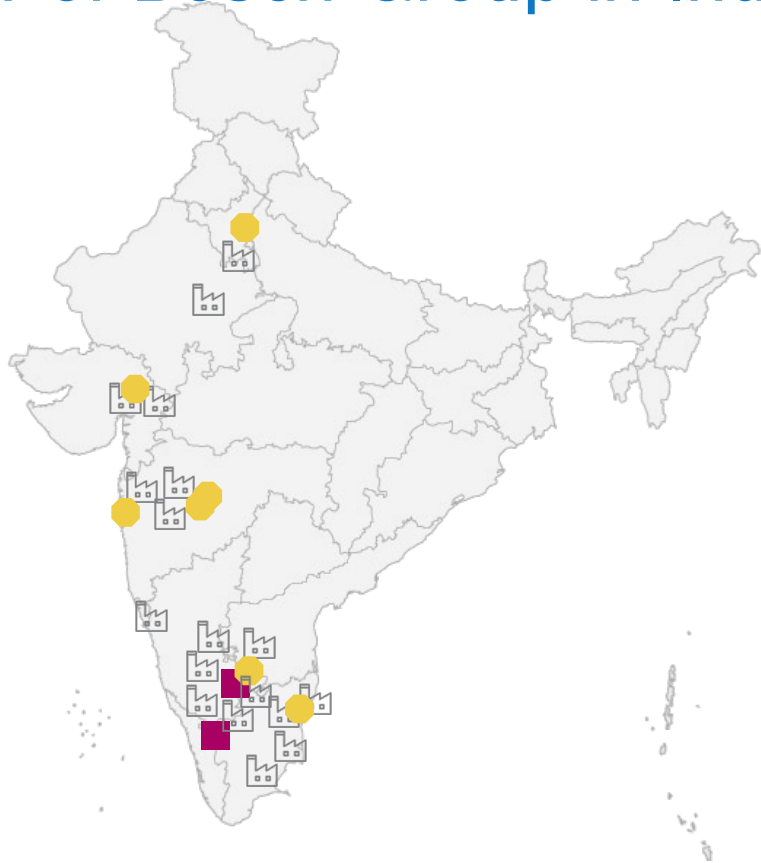


- ▶ Enable all electronic products to be accessible over the internet by 2020
- ▶ Provide new functions and services with connected products
- ▶ Turn connected products into people's intelligent assistants
- ▶ **Strategic target: Make Bosch a leading IoT company**

Bosch in India


Bosch Limited – Investors’ Meet 2019

Overview of Bosch Group in India FY 2018-19



● Headquarters
■ Manufacturing
■ Development


11 Companies


Sales: 214 bn



>1,500 Suppliers



~32,400 Employees


>3,500 Sales Outlets


18 Mfg. plants

Bosch Ltd


Sales: 123 bn


~9,410 Employees

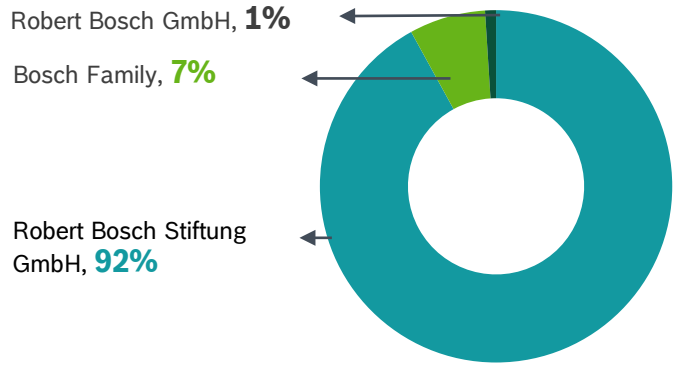

8 Mfg. plants

Bosch Ltd. is the flagship company of the Bosch Group in India

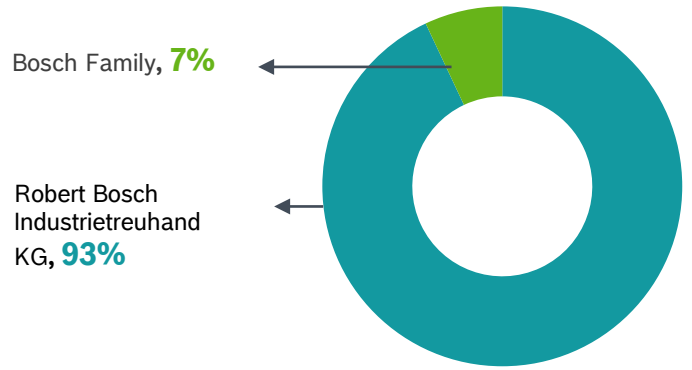
Bosch Limited - Investors' Meet 2019

Bosch's uniqueness

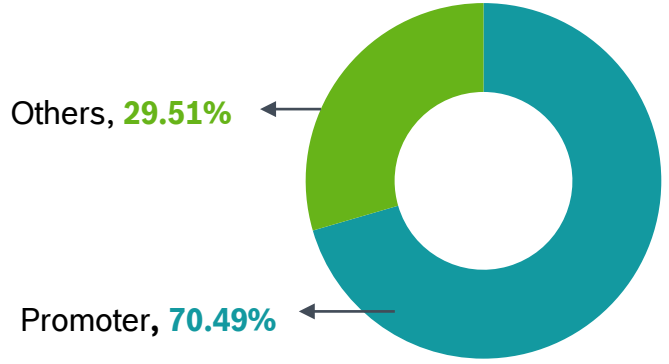
RB GmbH Shareholding



RB GmbH Voting Rights



Bosch Ltd. Shareholding and Voting Rights



Unique shareholding pattern → Globally: majority shareholding with a Trust

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Bosch India Social Engagement

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Challenging Global environment in 2018...

| | TT SELL | CHQ BUY | NOTE BUY |
|-----|---------|---------|----------|
| USD | 0.8142 | 0.8146 | 0.8886 |
| GBP | 0.5117 | 0.5121 | 0.5674 |
| EUR | 0.6527 | 0.6531 | 0.7225 |
| NZD | 1.0623 | 1.0634 | 1.1704 |
| JPY | 93.1470 | 93.4230 | 103.700 |
| HKD | 6.3 | | 106.560 |



& challenging outlook for 2019!



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Mobility: Regulatory Push and Market Impulses



The government is expected to mandate the sale of only electric three-wheelers from April 2023

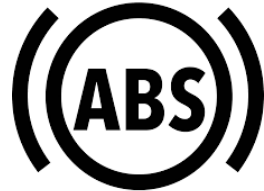
All new two-wheelers with engine capacity up to 150cc driving out of showrooms may have to be powered by electricity from April 2025.



Niti Aayog

नीति आयोग

National Institution for Transforming India



Emission Norms

BS4 countrywide, BS6 in 2020

Fuel Consumption Regulations

CAFE 2022

Crash Standard

All models from 2019

Safety

CV ABS 2015, PC and 2Wh ABS 2018, AIS145 (Mandatory Airbags, Reverse parking sensors, seat belt reminder)

Market Trends

FAME2 – Focus on Shared electric mobility & infrastructure

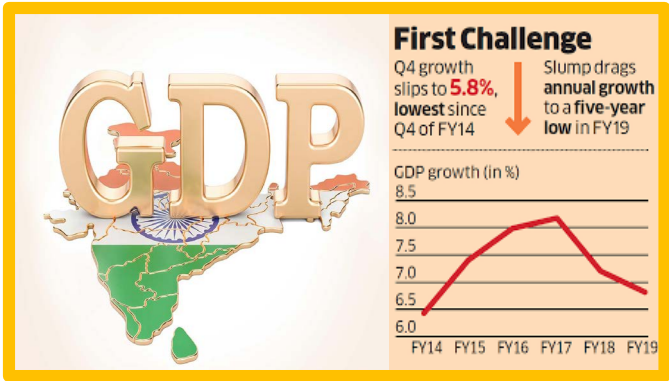
MOVE – Mobility Vision for India



Large amount of regulatory requirements and new market trends will drive fast technology and product adaptation for Indian Market

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Economic Overview – Key Indices



Severe Impact on the Indian Automotive Industry

Bosch Limited - Investors' Meet 2019

Strong headwinds for the Automotive Market

Nobody knows when the growth is going to come back. Nor do we: Rajiv Bajaj

By Nehal Challawaia, Satish John, ET Bureau | Updated: Apr 08, 2019, 01:38 PM IST



ET Bureau



HIGHLIGHTS

- We export around the world. We are less vulnerable to what happens in India.
- We are increasing production because we don't have an inventory problem.
- As commodity prices have fallen, we should be stable.

Siam president Rajan Wadhwa said the auto industry has not witnessed such a sharp drop in sales in the past decade. He said the industry is hoping for a recovery in the months ahead, with the arrival of festivals and an improvement in the availability of loans. "The automakers are in a situation where their cost is more than the revenue," he said.

Banks go slow on lending to auto dealers

Experts estimate the total outstanding loans to automobile dealers to be in the range of Rs 70,000-80,000 crore.

Maruti Suzuki Chairman RC Bhargava Warns of More Hit to Auto Sales in India

Maruti Suzuki chairman RC Bhargava has expressed apprehensions as he fears factors like the US embargo on Iranian crude imports and new BS-VI emission norms playing spoilsport.

Amid falling freight rates, truck makers may not see demand picking up

Pre-buying boost to sales may remain elusive as the slowdown grips several sectors

Auto slowdown: 286 dealers closed down in 18 months, 32,000 jobs impacted

The worst-hit is the passenger car segment. Maharashtra leads with 84 closures, followed by Tamil Nadu and Delhi

Slowdown Blues: Auto industry unanimous on its demand for GST cut to 18%, says SIAM

Around 2 lakh jobs have been cut across automobile dealerships in India in the last three months

Dealership inventory pile up despite production cut: FADA

As a result, industry experts feel that more dealerships will be pushed on a verge of closing due to increasing financial stress.

Auto slump strikes again: Mahindra plans 8-14 'No production days' in Q2

Industry stalwarts are lacking clarity on the market outlook and the poor customer sentiments

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Key Ongoing Initiatives

Focus on Core

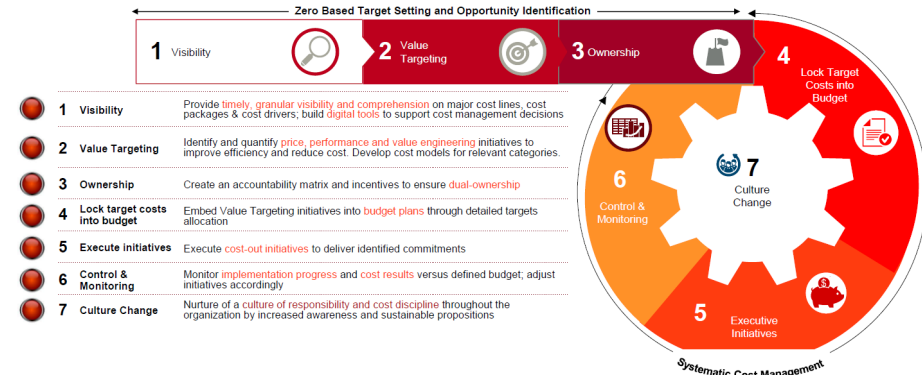
PS: BS6 Deliverables
Beyond Mobility
Operations Excellence
Localisation

Opportunities of Growth in New Areas

Core & Adjacencies
2Wh, CVO

Agile Project Houses

Electrification, Mobility
Services, I4.0



ZBB & ZBO

M&A and Other Strategic
Alliances

Inorganic Growth

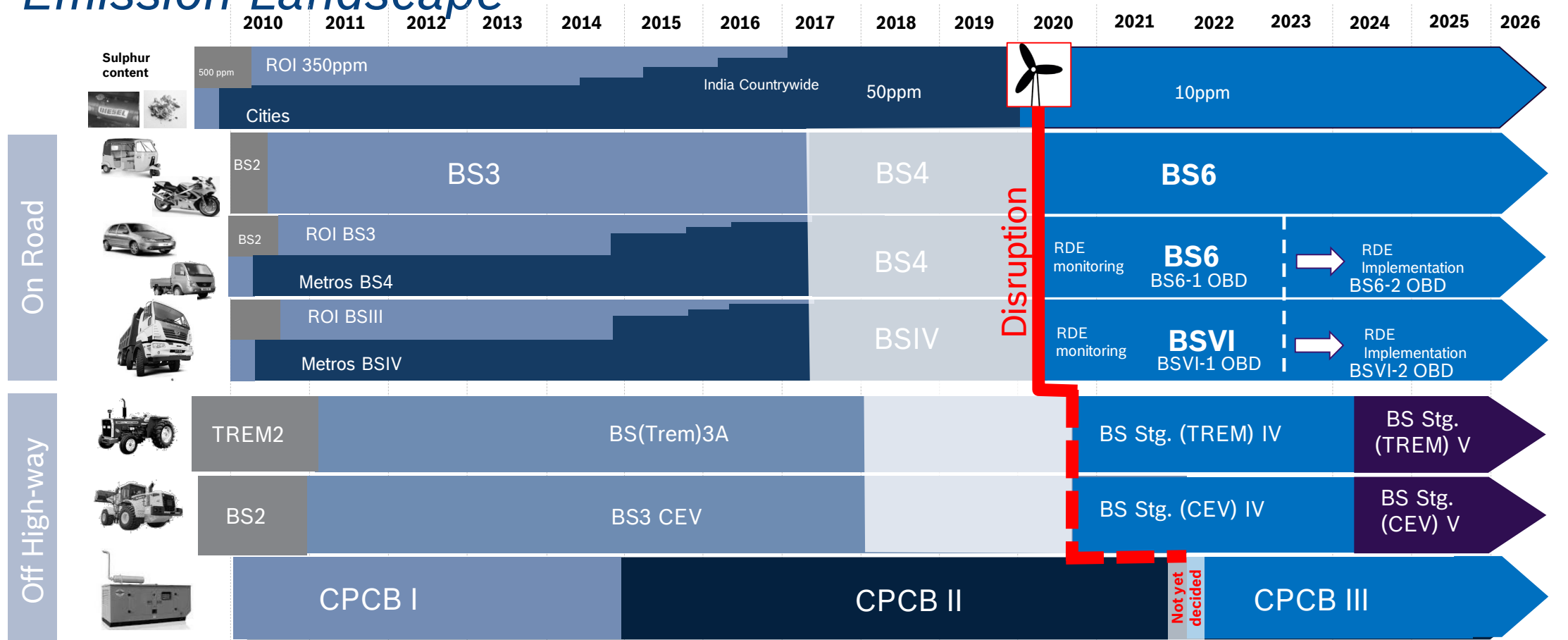
Space and Property
Optimisation

Transformation and Restructuring is paramount for staying future relevant

Looking Ahead...

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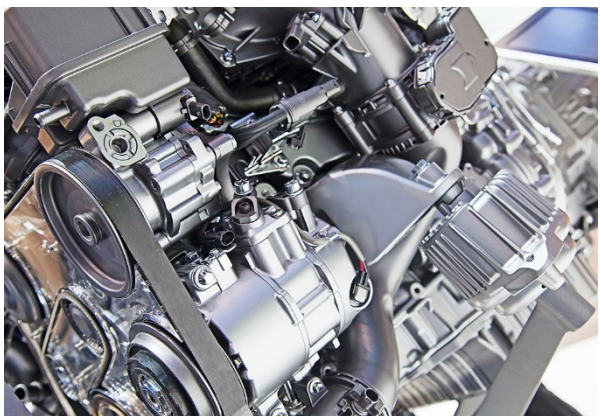
Emission Landscape



Indian automotive industry is undergoing a disruptive technology change during the next years

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Powertrain Transformation

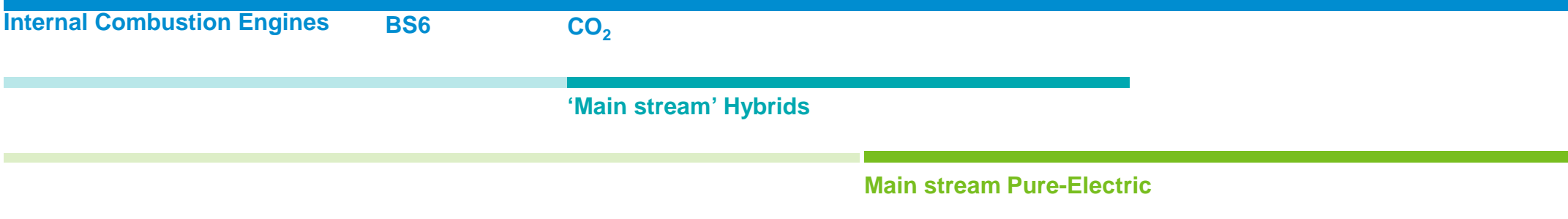


2020



2023

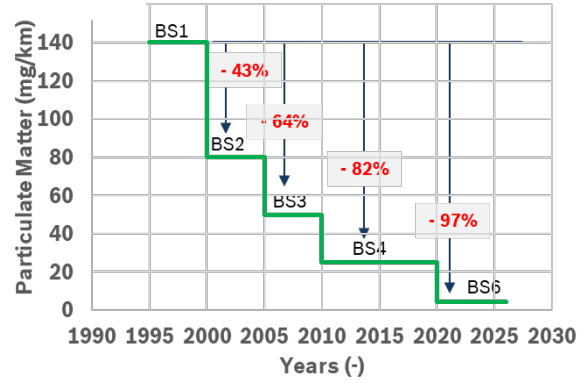
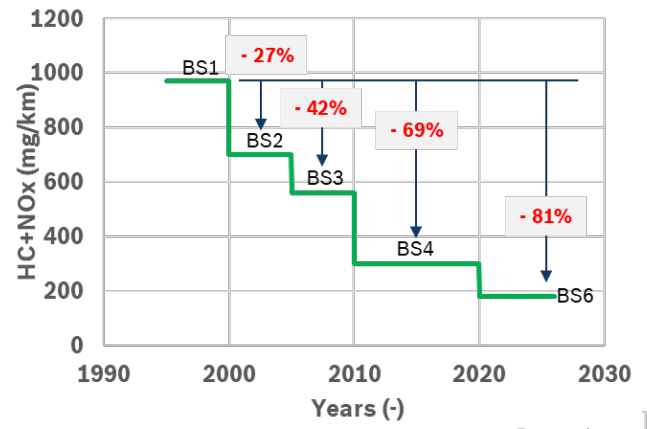
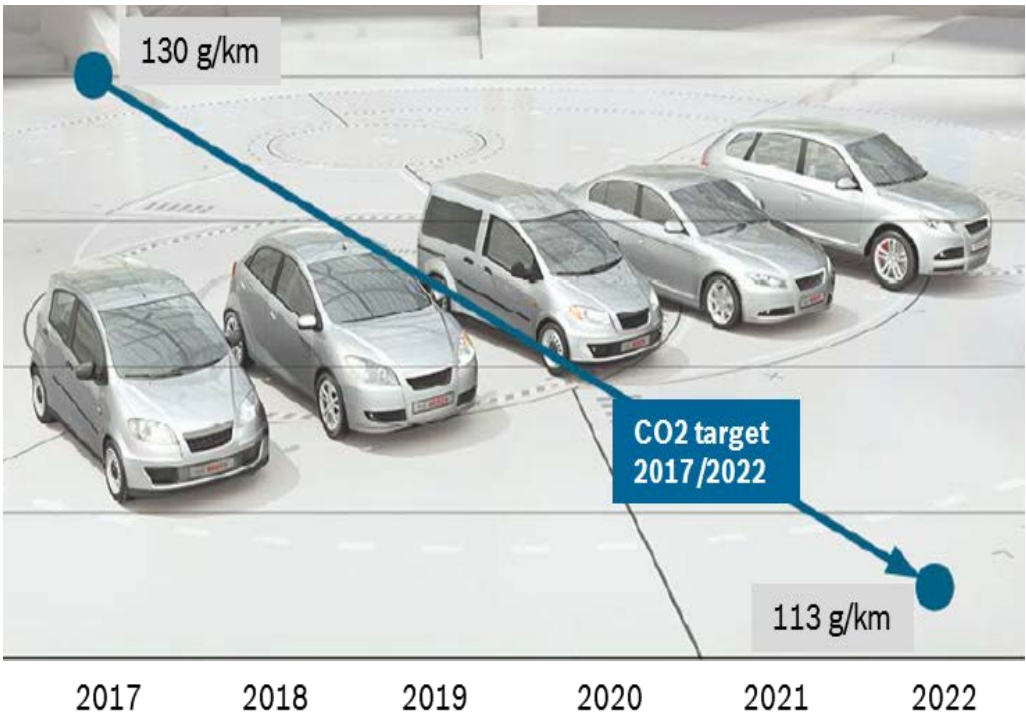
2030



Transition from ICE to Hybrid and Pure Electric in a structured manner

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Engineering Targets



Bosch has partnered with customers to successfully develop BS6 technology in record timeline

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Bosch Solutions for Electrification

Project house
Electromobility



Solutions ranging from 48V Hybrids to high voltage electric for all performance / vehicle classes

| | | | | |
|---|---|---|---|---|
|  <p>eScooter Sharing</p> |  <p>HMI</p> |  <p>Research and advanced engineering for future EV concepts</p> |  <p>System integration</p> |  <p>Charging Solutions</p> |
|  <p>Re-regenerative braking systems PC</p> |  <p>Thermal Management Solutions</p> |  <p>48V and higher hybrid Solutions</p> |  <p>eDrive for EVs</p> |  <p>Battery for EVs</p> |

A modular product and services portfolio covering the entire ecosystem of electrification

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Two-Wheeler technology Overview

Assistance systems



Steering-angle sensor



Inertial measurement unit



Wheel-speed sensor



Motorcycle antilock braking system (ABS)



Motorcycle stability control (MSC)



ESP®



Semi-active damping control unit



Engine control units



Crankshaft speed sensor



Other engine management sensors



Fuel-supply module



Throttle position sensor



Throttle body Assembly*



Electronic throttle body



Manifold air-pressure sensor & temperature sensor



Canister purge valve



Combined charge sensor



Fuel injector



Spark plug



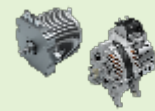
Lambda sensor



Lithium starter battery



In-hub Motor



Central drivetrain



Control Unit

Li-Ion Battery



Charger

Connectivity systems



Integrated connectivity cluster



mySPIN



Connectivity control unit



Connectivity control unit for B2X



Connectivity box



E-Scooter Display



Remote (Bosch App)

*Licensing only

Bosch provides the comprehensive Systems, Services and Solutions

Bosch Limited – Investors’ Meet 2019

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Changing landscape of Mobility Sector

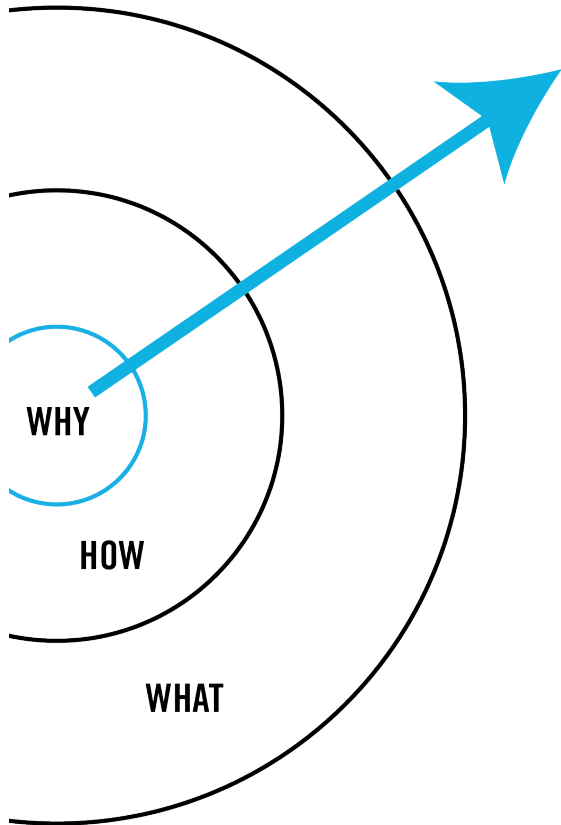
Integrated System Solutions

Other Businesses

Bosch India Social Engagement

Bosch Limited – Investors’ Meet 2019

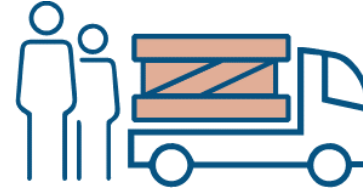
Project House Mobility Solutions



START WITH THE WHY

WHY PURPOSE

What do you believe?



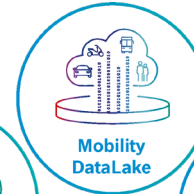
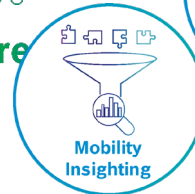
“Emission Free”
“Accident Free”
“Stress Free”

On a more personal note
Can I

- help my children breathe better air?
- prevent accidents for my near dear ones?
- enable myself to spend more time with family?

HOW PROCESS

Specific actions to realize the why



WHAT RESULT

What do you do?

Corporate
Mobility

Parking
Solutions

RDE
Prediction

Preventive
Diagnostics

Urban Traffic
Simulation

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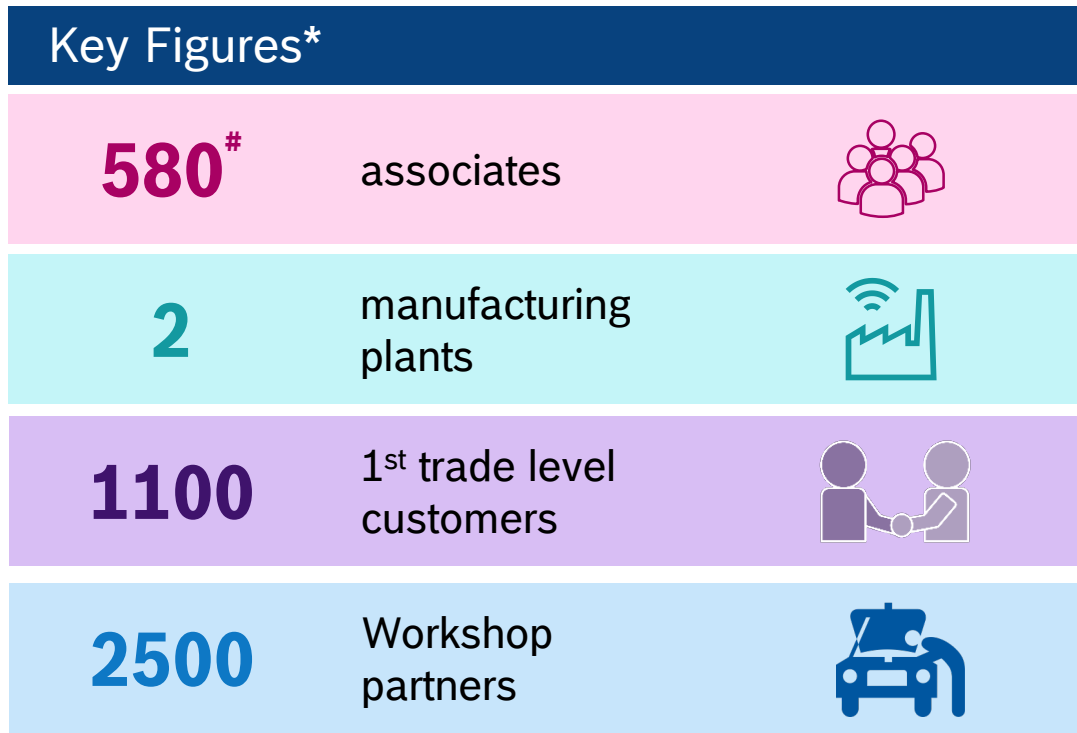
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Other Businesses

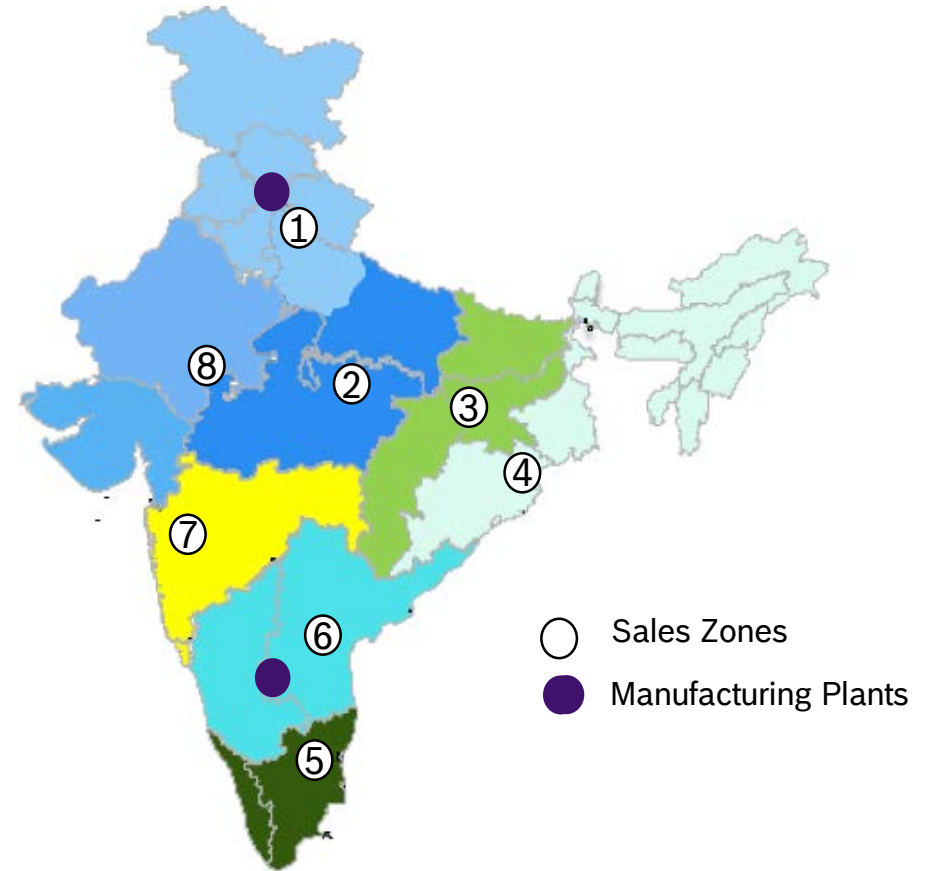
Bosch India Social Engagement

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Bosch Automotive Aftermarket India - Overview

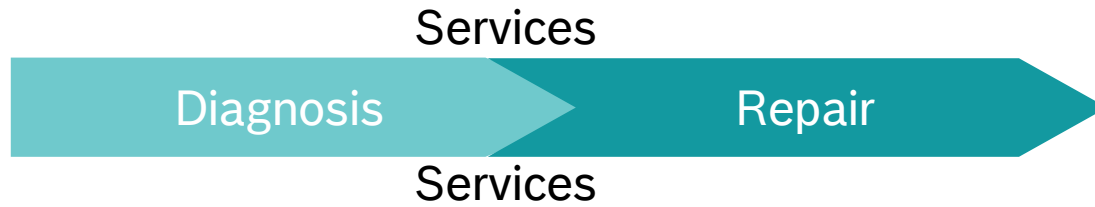


#Managerial staff only



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Automotive Aftermarket Strategy: Parts, Diagnostics & Services



Parts



Diagnostics

Software ESI[tronic]



Test equipment & products



Workshop Services

Connected Cloud Services



Car Driver Portal



Technical training and hotline



Connected Workshop



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Power Tools: Product Portfolio



Construction Range



Metal Working Range



Power Tool Accessories



Woodworking Range



Cordless Range



Total Measuring Solutions



Cleaning Solutions for Maintenance



Service



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Bosch Security and Safety Systems Solutions Portfolio



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Bosch Energy and Building Solutions: Overview

“First Energy Services Choice for Industrial and Commercial Customers”



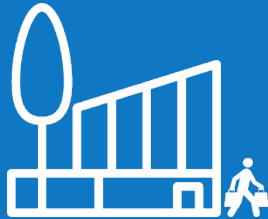
Solar PV Solutions
~88% Revenue



Energy Efficiency Solutions
~12% Revenue



Industrial
~75% Revenue



Commercial
~25% Revenue



Solar Roofs

Best Solar EPC Player,
2019



National Energy Circle Awards

Energy Efficiency Implementation, 2017



REI Awards

Best Solar Rooftop Integrator in India, 2018

Key Accreditations



GOVERNMENT OF INDIA
MINISTRY OF NEW AND RENEWABLE ENERGY

Highest rating of SP1A Channel Partner for on-grid and off-grid Solar PV installations



BUREAU OF ENERGY EFFICIENCY
Government of India, Ministry of Power

Highest rating of Grade 1 ESCO for Energy Efficiency related offerings

Key Industrial & Commercial Customers

VE COMMERCIAL VEHICLES
A VOLVO GROUP AND EICHER MOTORS JOINT VENTURE

RENAULT NISSAN

SIEMENS

MARUTI SUZUKI

HONDA

LEAR CORPORATION

HATSUN
Dairy Products

CIAL
COCHIN INTERNATIONAL AIRPORT LIMITED

Kempegowda
INTERNATIONAL AIRPORT BENGALURU

BAGMANE

Narayana Hrudayalaya Hospitals

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Bosch Energy and Building Solutions | Key Projects



Bagmane Tech Park
Belgaum
28 MW ground-based solar project
Fastest executed solar project by Bosch



Honda Motorcycle and Scooter India
Manesar, Tapukera, Vithalapur, Narsapura
25 MW rooftop solar project
Largest rooftop implementation by Bosch

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Bosch India Social Engagement Sustainability and Scale

► We Skill

► BRIDGE:

- 26,000 youth trained and employed through 272 BRIDGE Centers across India
- New partnerships included TATA Steel, Jamshedpur and TDU University, Bengaluru

► Artisan Training

- 9 Artisan Centers with 150 Artisans trained so far
- Focus on Carpentry, Plumbing and Electrician trades

► We Care

- Continued healthcare and education interventions benefitting 70,000 children in 300 Government schools
- 25,000 freshly-cooked and nutritious meals served from Bosch-Akshaya Patra Kitchen to eliminate classroom hunger in 141 Government schools in and around Jigani

► We Share

- Smart parking, 2 Solar plants, 8 Aerators & 200 segregated waste bins at Lal Bagh Botanical Garden, Bengaluru
- 14 Check Dams in Nashik and 25 RO Plants in Jaipur
- Shanumangala Lake Rejuvenation in Bidadi

► We Empower

- Holistic village development intervention in 307 villages
- Women Empowerment Center in Nashik, Garment tailoring training in Bidadi, Primavera Knowledge Center benefitting 70 rural girls



Bosch Limited – Investors’ Meet 2019

Bosch Global Board Visit : 16th to 18th July



Bosch Global Board Visit >> Reestablishes Bosch’s resolve to partner India as it transforms

*“When managing any undertakings
of Robert Bosch GmbH, the*

***principles of maximum
economic efficiency***

*shall be adhered to in the manufacture
of goods as well as in internal and
external administration.”*

Robert Bosch,
guidelines for executors, dated Dec. 23, 1937, sec. 9

A black and white portrait of Robert Bosch, an elderly man with a full white beard and mustache, wearing a dark suit jacket and a patterned tie. He is looking slightly to the right of the camera with a thoughtful expression.

Thank You