Dear Sir/Madam,

**Sub: Intimation of Analyst / Institutional Investor Meetings.**

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

This is with reference to our letter dated July 04, 2020 on the captioned subject.

Copy of the presentation shared with the institutional Investors /Fund houses is attached herewith for your information. The said presentation will also be uploaded on the Company’s website i.e. [www.bosch.in](http://www.bosch.in) under Investors section.

This is for your information please.

Thanking you,

Yours faithfully,

for **Bosch Limited**,  
SD/-

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

**Justification for non-submission of signed copy of the disclosure:**

As per the MCA’s advisory on preventive measures to contain the spread of COVID-19 and the implementation of the Company’s “Work from Home Policy” in line with the same, this disclosure is being submitted without signature.
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Bosch Ltd.
Investors’ Conference
Soumitra Bhattacharya
Managing Director, Bosch Ltd

Bengaluru | 6th July 2020
Bosch Ltd | Annual Press Conference 2020

AGENDA

- Bosch Global
- Bosch in India & Bosch Ltd
- 2019 – A look back
- 2020 – An Unprecedented Crisis
- Financial Results of FY20
- Way Forward
  - Securing Operations
  - Mobility
  - Automotive Aftermarket
  - Power Tools
  - Leveraging Bosch Group in India
- Climate Change
- Summary
Bosch Global

77.7 billion euros sales revenue in 2019

72,600 researchers and engineers worldwide

Approx. 440 subsidiaries and regional companies in more than 60 countries

2.9 billion euros EBIT in 2019

6.1 billion euros research and development expenditure
“Technology, which is designed and has the capability to help the whole of mankind make the best of their lives and find happiness in life.”

~ Robert Bosch
Business Sectors

**Mobility Solutions**
- Powertrain Solutions
- Chassis Systems Control
- Electrical Drives
- Car Multimedia
- Automotive Electronics
- Automotive Aftermarket
- Automotive Steering
- Connected Mobility Solutions
- Bosch eBike Systems

Other businesses:
- Bosch Engineering GmbH
- ETAS GmbH
- ITK Engineering GmbH
- Two-Wheeler and Powersports

1. New division from January 1, 2020

**Industrial Technology**
- Packaging Technology\(^1,2\)
- Drive and Control Technology\(^3\)

Other businesses:
- Bosch Connected Industry
- Robert Bosch Manufacturing Solutions GmbH

**Consumer Goods**
- Power Tools\(^4\)
- BSH Hausgeräte GmbH

**Energy and Building Technology**
- Building Technologies
- Thermotechnology
- Bosch Global Service Solutions

Other businesses:
- Robert Bosch Smart Home GmbH

1. Robert Bosch Packaging Technology GmbH
2. Until December 31, 2019
3. Bosch Rexroth AG (100% Bosch-owned)
4. Robert Bosch Power Tools GmbH

\(^1\) Robert Bosch Power Tools GmbH
\(^2\) Until December 31, 2019
\(^3\) Bosch Rexroth AG (100% Bosch-owned)
Bosch in India

1922
1st Sales Office in Calcutta

1953
1st Manufacturing Operations in Bangalore

195
Billion rupees Sales Revenue In 2019

Bosch Ltd
Flagship Company of the Bosch Group in India

15
Group Companies

16
Manufacturing Facilities

16
manufacturing Facilities of Bosch Ltd

31,530
Bosch Ltd Associates

3,500
Sales Outlet

1,500
Suppliers

100
Billion rupees

1922
Bosch Ltd

7,550
Bosch Ltd Associates

MOBILITY SOLUTIONS

ENERGY & BUILDING TECH.

CONSUMER GOODS

INDUSTRIAL TECH
2019
A year of Challenges

NBFC CRISIS
LIQUIDITY CRUNCH
STRUCTURAL SHIFT
DEMAND SLOWDOWN
HIGH INVENTORY
CLIMATE CHANGE
Severe impact of the coronavirus pandemic.
Only a rough estimate of the extent of the crisis is currently possible.

**IMF forecast for Global GDP for 2020 is currently -3.0%**

**VEHICLE PRODUCTION FY 2019-20**

- **TRACTORS** -15%
- **3 WHEELERS** -11%
- **CAR + UV** -15%
- **LCV** -22%
- **HCV** -47%
2020 An Unprecedented Crisis

Bosch Ltd

6 Plants Shut down

80% Staff Work From Home for ~6 Weeks

~800 associates working in task forces

Negligible Sales

April 2020. May & June 2020 Uncertain
Automotive Market Trends

COVID19 impact projected to push back the auto industry to 2008 ~ 2010 levels

Sales YoY %

Scenario Realistic Worst

Pre Post COVID-19

-7% -46% -61%

-21% -49% -61%

-37% -59% -70%

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CONTRIBUTIONS
BY
BOSCH LTD
IN FIGHT AGAINST
COVID-19

₹5 Crores
Pledge by Bosch Group in India

₹50 Crores
Pledge by Bosch Group in India

>100,000 masks per day
Severe impact of the coronavirus pandemic. Only a rough estimate of the extent of the crisis is currently possible.

IMF forecast for Global GDP for 2020 is currently -3.0%.

**Vehicle Production FY 2019-20**
- **Tractors** -> -15%
- **3 Wheelers** -> -11%
- **Car + UV** -> -15%
- **LCV** -> -22%
- **HCV** -> -47%

**2018-19 2019-20**
- **₹ 98.4 bn**
- **-18.6%**

**Respectable Performance in a Difficult Market Environment**
- Margin from operations 11.2%
- Dividend per share retained at ₹105, subject to shareholders’ approval
Resumption of Operations hinges on associates needing to know they are not risking their health.

Reassurance:

Coordination:

Achieving demand-supply balance & removing supply chain bottlenecks.
Mobility Portfolio

PREPARED FOR THE FUTURE

From Powertrain to Connectivity to Safety
BS6 Changeover amidst COVID-19 crisis

150 BS6 projects

79 OEM projects deliveries

Investment in factories, infrastructure, R&D and competence

~73 PC & LD BS6 projects
System solution provider

~25 EMS projects across 4 OEMs with systems & Components

~52 BS6 programs
Powertrain
Legislation & Technology Changes
New Opportunities and Efficiencies

Emission Standards | OBD | IRDE | CAFE

Fuel Injection Equipment
Exhaust Gas Treatment
Engine Calibration
Software Functions
Warm Up Management
Hybrids

Fuel Injection Products | Exhaust System Products
Sensors | ECU | EMS
Electric Powertrain Solutions

400m EUR
Approx. investment globally on R&D for Electrification

Solutions tailored for Indian needs
2EV 2Wh projects in last 24 months

ICE will still be dominant and relevant

Electric

2-Wheeler
Electric Bike (Pedelec)
0.25 - 0.5 kW
36 V

2-Wheeler
Electric Scooter (low power)
0.5 - 3 kW
36 - 60 V

2-3-Wheeler
Electric Scooter (eMotorcycle)
2 - 25 kW
36 - 60 V

3-4-Wheeler
Light Electric Vehicle
4 - 30 kW
36 - 60 V

4-Wheeler
Mild Hybrid
6 - 25 kW
48 V

4-Wheeler
Strong PHEV
30 - 120 kW
120 - 460 V

5-Wheeler
Electric Vehicle
40 - 450 kW
120 - 850 V

ICE will still be dominant and relevant
Mobility Services

And Connected Solutions

Connected and personalized
Mobility Solutions for India

Innovative & intelligent
vehicle architecture

Cloud based services
to boost services
2Wheeler & 3Wheeler

- Engine Management System
- Integrated Electrification System
- Safety Systems (ABS, MSC)
- Sensors
- Infotainment & Connectivity

Powertrain Systems & Electrification
Connectivity Systems | Assistance Systems
Automotive Aftermarket
Diagnostics to Repair

1100
1st Trade level Customers

1500
Workshop partners

7 Additional
Regional Offices
In 2020

Parts
Diagnostics
Workshop Services
Automotive Aftermarket Transformation

Strategic Focus Areas

Customer & Distribution Strategy

Demand Generation

De-risk from Diesel & grow in focus products

Portfolio Strengthening

Workshop Concepts and Cooperation

Digital Ecosystem

Enable business transformation

Processes | Digitalization
Power Tools

Fascinate Users, Affordable Solutions, Better Life

>300 Service Centers
Widest service network

Availability of
> 9000 SKU’s
in 12 warehouses
Pan India

Focus on Service

Tradesman | Contractor | Construction
Industrial | Institutional
Power Tools

Digitalization is no longer “Nice to have”

80% of our Users search for our products online

>50% of our Users buy our products online

E-commerce
FOR NEXT GEN INDIA:

WITH

technology agnostic solutions

ICE  ELECTRIC  SENSORS  SOFTWARE  SERVICES  PEOPLE

LEVERAGING BOSCH GROUP IN INDIA

Robert Bosch Engineering and Business Solutions | Bosch Automotive Electronics India | Bosch Chassis Systems
ETAS Automotive India | Bosch Electrical Drives India | Bosch Rexroth (India) | BSH Home Appliances
climate action

ALSO REMAINS VITAL

We have to combat coronavirus without forgetting climate change
Summary

Short Term

- **Slow ramp-up of operations** ongoing, Auto industry will need **many years** to go back to FY19 levels
- Under challenging market environment, short term focus on getting an **optimal result for FY21**

Mid to Long Term

- Leverage **global reach and expertise** to bring in cutting edge technology in **new age topics**.
- Focus on **sustainable and profitable growth** through **structural transformations**.
- Adoption & **Investment in technologies** that will secure our business in future.
- **Mobility Portfolio**: We are prepared for the Future
- Bosch Ltd to leverage the **know how of other group companies** of Bosch in India.
- **Long term forecast** for India remains **positive**, Bosch remains invested with its **tech agnostic approach**
BOSCH LTD.
INVESTORS’
CONFERENCE
2020