

Lumax Auto Technologies Limited

Q3 & 9MFY25 Investor Presentation



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About Lumax Auto Technologies



Leading Auto Component Manufacturer having a Tier I relationship with all OEMs in India

10

JVs with market leaders in Gear Shifter Systems & Vehicle Interior Comfort Systems

13

Product Lines
EV agnostic products

28

Manufacturing facilities located in seven states, strategically positioned with proximity to customers

20+

Established, long-term relationships with prominent clients in the automotive sector

3

1 R&D & 2 Engineering centers with >400 engineers dedicated to continuous product development

575+

Channel partners for After-Market segment with more than 27,500 retail touch points

Key Financial Parameters (FY24)

Rs. 2,800+ crs

Revenue

37%

CAGR Revenue growth last 3 years

>14%

EBIDTA Margins

>25%

RoCE

Rs. 400 crs

Free Cash

Diversified Product Portfolio



Advance Plastics



Cockpit & Consoles



Door Panels



Air Intake Systems



Urea & Plastic Fuel Tanks



Headliners



Trims



Louvers



Head Lamps



Tail Lamps



Front & Rear Fender

Mechatronics



Power Window Switch



O2 Sensor



Telematics Control Unit



Shark Fin Antenna



Telematics Antenna



LF Antenna

Structures & Control Systems



Gear Shifter



Control Housing



Monostable E-shifter



Smart Actuator



Shift Tower



Frames



Swing Arms



Seating Structures

Aftermarket



Horn



Engine Oil



Lubricants



Wiper Blade



Filters



Gear Knob



Mirrors



Door Visor

And Many More...

Alternate Fuels



PRE-BEND TUBES



ELECTRONIC PRESSURE REGULATOR



CNG MANIFOLD



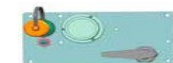
NGV FILLING VALVE



H2 RECEPTACLE



CNG CYLINDER & CYLINDER VALVE



H2 RE-FUELLING PANEL

EV Agnostic Product Portfolio

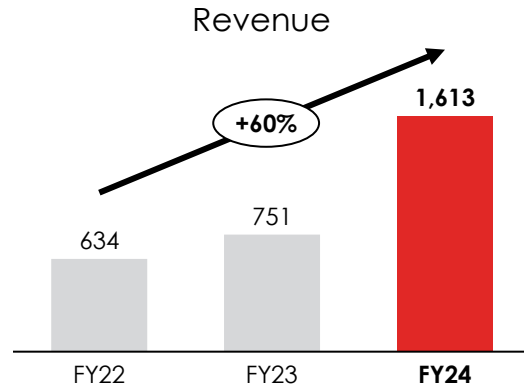


Segment	Product Categories	Products Lines	ICE	EV	Content per Vehicle (Rs.)
4W	Advance Plastics	Cockpits & Consoles	✓	✓	70K – 75K 5X Growth Last 5 years
		Headliners	✓	✓	
		Door Panels	✓	✓	
		Trims	✓	✓	
		Louvers	✓	✓	
		Air Intake Systems	✓	X	
	Mechatronics	Tanks	✓	✓	
		Power window switch	✓	✓	
		Telematics Control Unit	✓	✓	
	Structures & Control Systems	Antennas	✓	✓	
		Gear Shifters	✓	✓	
		Control Housing	✓	✓	
		Monostable E-shifters	✓	✓	
		Smart Actuator	✓	✓	
Alternate Fuels	Shift Tower	✓	✓		
	Seating Structures	✓	✓		
	Alternate Fuels	CNG delivery System	NA		
2W	Advance Plastics	Lamps	✓	✓	15K – 18K 4X Growth Last 5 years
		Fenders	✓	✓	
	Mechatronics	O2 Sensors, TPS & IVI	✓	✓	
		Structures & Control Systems	Frames	✓	
	Swing Arms		✓	✓	

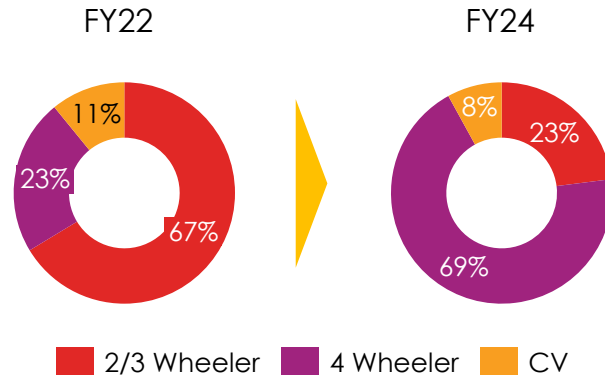
Expanding presence with Spectrum of Solutions



Advance Plastics



60% CAGR Growth



4-Wheeler share has increased from 23% in FY22 to **69%** in FY24

Key Customers:

Bajaj, M&M, Tata, MG, Toyota, Volkswagen, HMSI, HCIL, Fiat, Skoda, Renault, Nissan, Hero, After Market

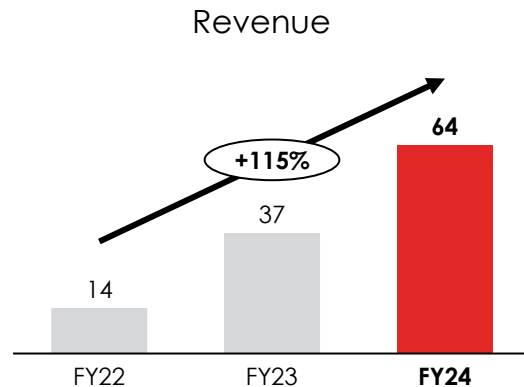
Key Entities:

LATL
IAC
Lumax Cornaglia

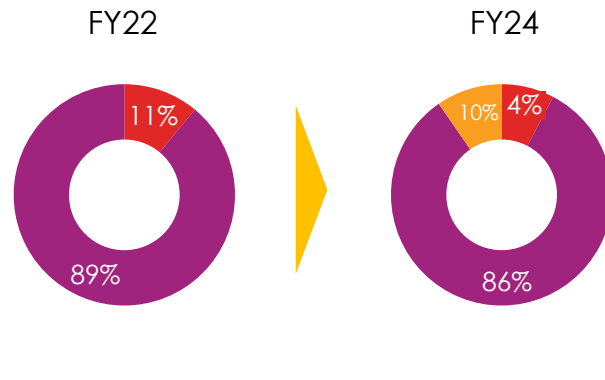
Outlook

- Huge cross selling opportunities among existing customers and addition of new customer
- New products like interior lighting, Expansion tank, Roto Roof, PFT, De-Gasing etc
- New customer addition for lighting in FY24; expecting ramp up in current year
- Focus on penetration into LED lighting
- Order book of **~Rs. 660 crs**

Mechatronics



115% CAGR Growth



Key Customers:

MSIL, Honda, Toyota, Daimler

Key Entities:

Lumax Alps
Lumax Yokowo
Lumax Ituran
Lumax FAE

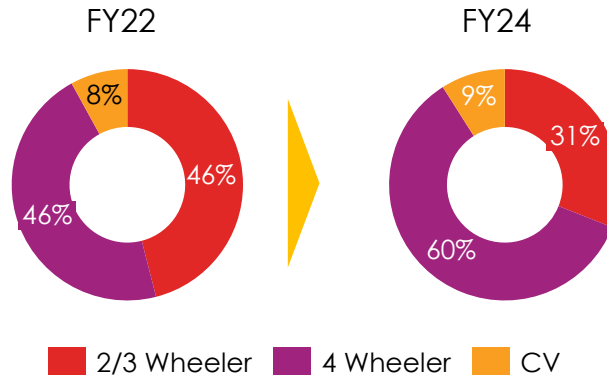
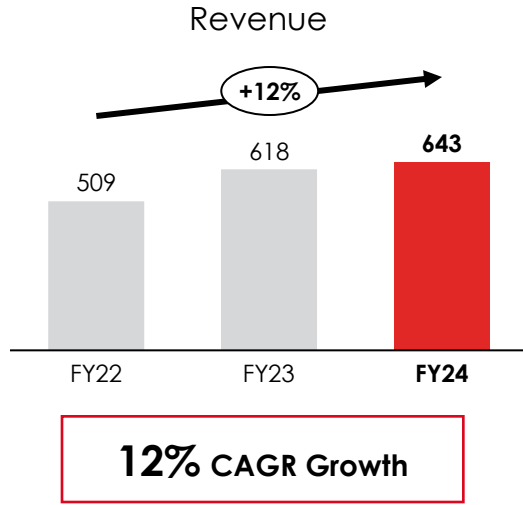
Outlook

- Huge opportunity in terms of wallet share in new model launches
- Incremental wallet share among existing customers
- Addition of new customers & new product addition
- Order book of **~Rs. 320 crs**

Expanding presence with Spectrum of Solutions



Structures & Control Systems



4-Wheeler share has increased from 46% in FY22 to **60%** in FY24

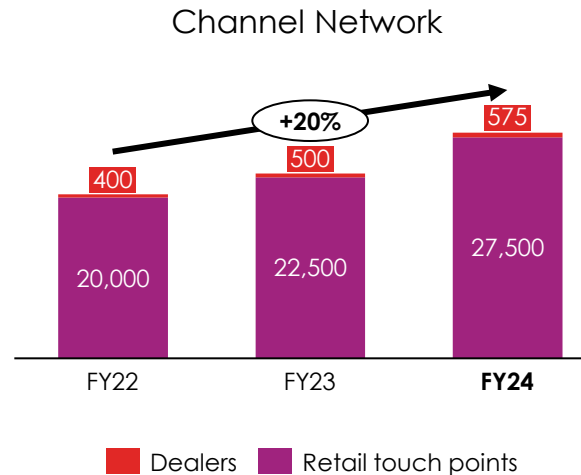
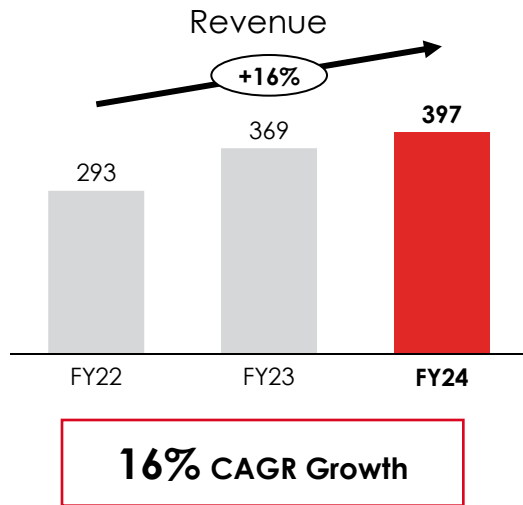
Key Customers:
MSIL, M&M, Toyota, Tata, Honda, Daimler, Bajaj, Fiat, Piaggio

Key Entities:
LATL
Lumax Mannoh
Lumax Jopp

Outlook

- Increase in wallet share among existing customers
- Addition of new technology driven products
- Penetration into premium & EV segment
- Order book of **~Rs. 170 crs**

After Market

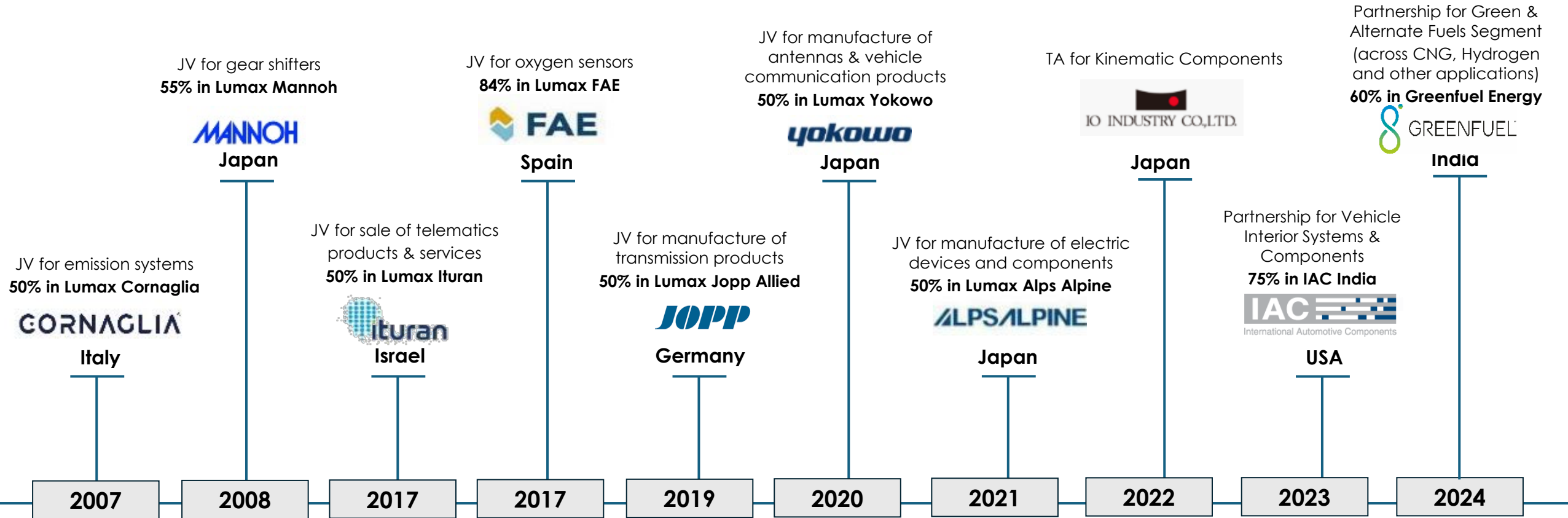


Key Entities:
LATL

Outlook

- Expansion of Channel network & Exports sales
- Addition of Product line

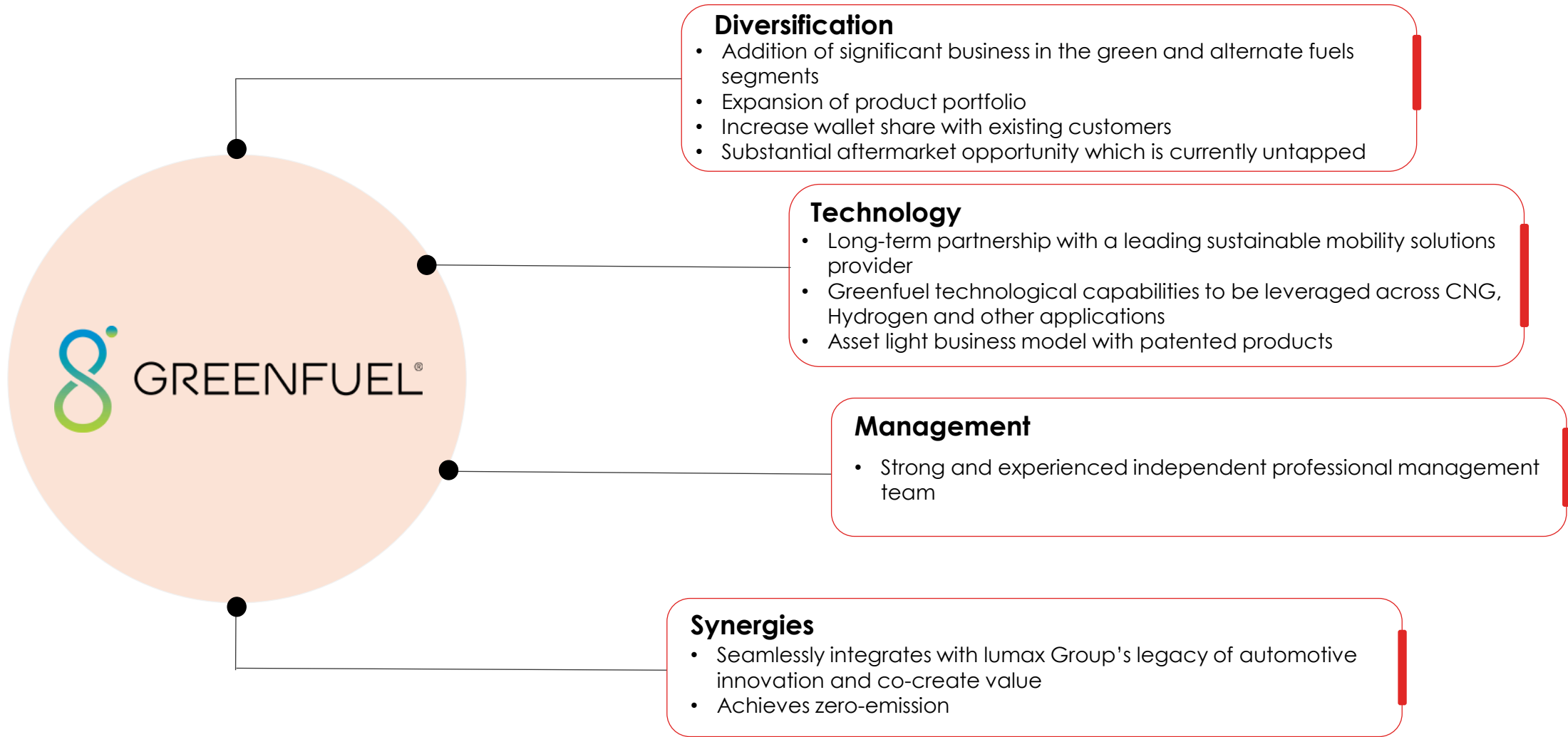
Localization in collaboration with Global Partners



Enabling growth with Global Partnerships



Acquisition of Greenfuel to unlock Diverse Growth Opportunities



Greenfuel is industry leader in **Alternate Fuel Systems** to key automotive OEMs in India

Strategic Manufacturing Locations in Proximity to Customers



Manesar & Gurugram (Haryana)

No of Plants - 9



Mehsana (Gujarat)

No of Plants - 1

Pithampur (Madhya Pradesh)

No of Plants - 1

Pune, Nashik & Waluj (Maharashtra)

No of Plants - 10



Pantnagar (Uttarakhand)

No of Plants - 3

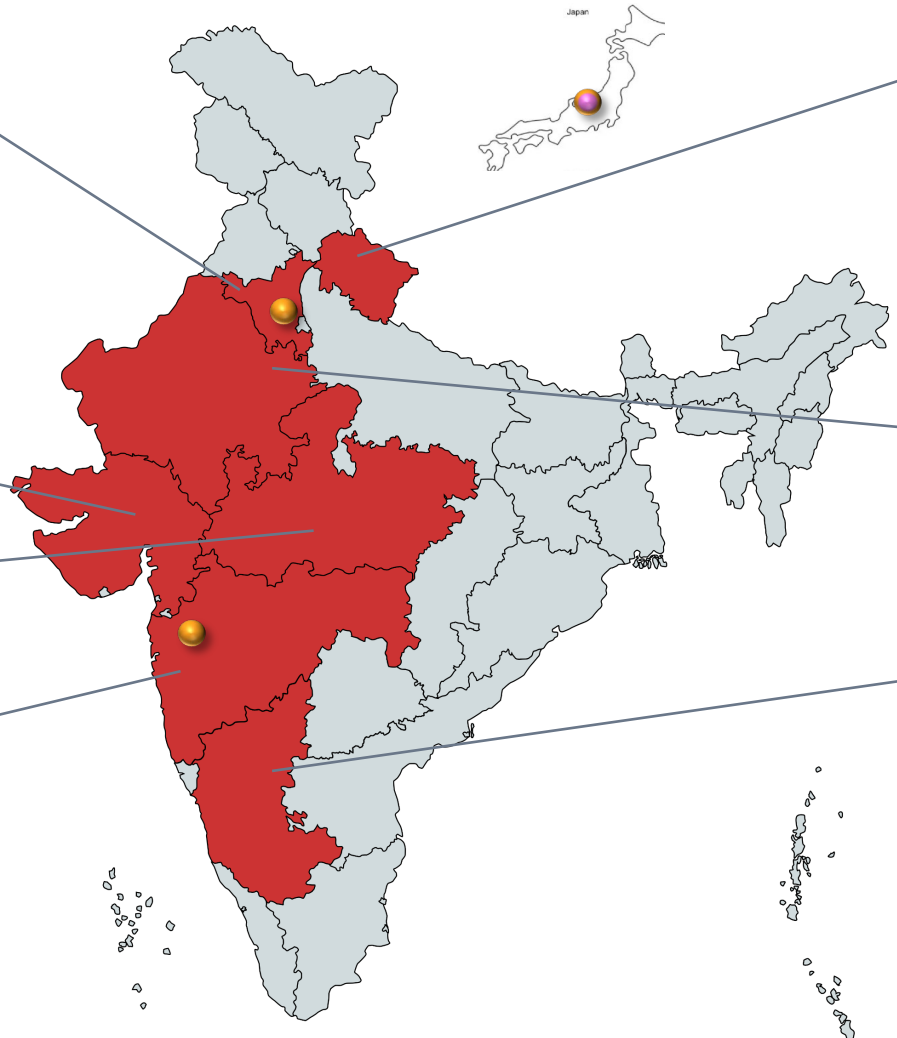


Bhiwadi (Rajasthan)

No of Plants - 1

Bangalore (Karnataka)

No of Plants - 3



28 Plants in 7 States

R&D Centre in Manesar
Engineering Centres in Pune

1 satellite office in Japan

Map not to scale. All data, information and maps are provided "as is" without warranty or any representation of accuracy, timeliness or completeness

Enhancing the Path to Innovation



Government certified in-house **R&D center and an Engineering Center**, indicating a strong commitment of developing Cutting-edge Technologies

To **integrate and inculcate R&D strengths** of global partners to leverage, develop, and manufacture locally according to the needs of the Indian market

In-house testing & validation facilities

350+ Engineers for on-going product development

Joint Product Development & Designing capabilities for OEM's

Received One **PATENT** & Applied for **Six** more

Product Design and Engineering | Dimensional Engineering | Product Development | Program Management | Tooling Development



Upholding excellence in Corporate Governance



Board of Directors

Promoter Group



Mr. Dhanesh Kumar Jain
Chairman

Over 50 years of experience in the automotive industry in management, operations & administrative roles. He has held various industry positions



Mr. Anmol Jain
Managing Director

He has held various positions in Industry associations - He was the National Coordinator of ACMA- YBLF from 2014-16. He was also the Chairman CII Haryana State Council in 2012-13 and has over 23 years of experience



Mr. Deepak Jain
Director

He has undergone extensive training at Stanley Co. Limited, U.S.A. & Stanley Electric Co. Limited, Japan and has over 27 years of experience and also holds various industry positions



Mr. Parag Chandulal Shah

BS in Computer Engineering from Illinois and General Management Program from HBS having over 25 years of experience, including various Leadership positions at Mahindra Group



Ms. Diviya Chanana

Graduate & holds Diploma in Travel and Tourism having over 25 years of experience



Mr. Arun Kumar Malhotra

B.E Mechanical & MBA from IIM, Kolkata having over 30 years of experience



Mr. A P Gandhi

Mechanical Engineer from Birla Institute of Technology, Ranchi & Senior Management program from IIM having over 5 decades of experience

Independent Directors

Visionary Leadership Team



Mr. Vikas Marwah
Chief Executive Officer
Experience: 30+ Years



Mr. Sunil Koparkar
Managing Director,
(IAC India)
Experience: 30+ Years



Mr. Akshay Kashyap
Managing Director and
CEO - Greenfuel
Experience: 20+ Years



Mr. Sanjay Bhagat
Head After Market
Experience: 30+ Years



Mr. Sanjay Mehta
Director & Group CFO
Experience: 30+ Years



Mr. Ashish Dubey
Chief Financial Officer
Experience: 30+ Years



Mr. Pankaj Mahendru
Company Secretary
Experience: 15 Years

Our ESG Roadmap




RE 40	RE 70	RE 90	RE 100		
<ul style="list-style-type: none"> ✓ 100% ETP & STP in all plants ✓ Diversity ratio 10% ✓ ISO 14001 & ISO 45001 (EHS) in all plants ✓ ISO 27001- Top 10 revenue plants ✓ ISO 50001:2018 (EnMS)- 20% plants 	<ul style="list-style-type: none"> ✓ Advance Equipment installation for the reduction of fresh-water intake. ✓ 5% reduction of Co2 (Supply chain partners) ✓ Diversity ratio by 15%. ✓ ISO 50001:2018 (EnMS)- 50% plants ✓ ISO 27001- 50% plants 	<ul style="list-style-type: none"> ✓ 100% rain-water harvesting setup. ✓ 10% reduction of Co2 (Supply chain partners) ✓ Diversity ratio by 20% ✓ ISO 50001:2018 (EnMS) in all plants ✓ ISO 27001- in all plants & offices 	<ul style="list-style-type: none"> ✓ 25% reduction of Co2 (Supply chain partners) 	<ul style="list-style-type: none"> ✓ 30% reduction of Co2 (Supply chain partners) 	<ul style="list-style-type: none"> ✓ 40% reduction of Co2 (Supply chain partners) ✓ Diversity ratio by 25% ✓ Inclusivity 5%
FY24-25	FY25-26	FY26-27	FY27-28	FY28-29	FY29-30

Lumax – Plant Carbon Neutrality Strategy



First, we will mitigate the carbon emission by using Renewable energy, then by motivating team to increase daily Kaizen & by reducing energy consumption

Gender Diversity & Inclusivity



18% Today → **30% In next few years**

We believe in upskilling women and promote gender diversity





Lumax Charitable Foundation, the CSR arm of Lumax, actively works on the 3 SDGs –

- Quality Education, Good Health and Clean Water and Sanitation.
- Students in adopted government and low-income private schools are supported through various initiatives beyond school learning in terms of Life-skills, Career counselling and guidance
- Scholarship given to continue education, personal and menstrual hygiene aims to provide holistic learning experience
- The foundation also focuses on various health initiatives, including eye check-up and cataract surgeries, cancer awareness, screening and treatment interventions, juvenile diabetes for children from underserved communities and health check-ups in schools



Celebrating Milestones with Awards & Accolades



IAC India – 3 Awards (Business partner of the year, Special appreciation award for Thar & BE6 at M&M Vendor conference in Feb 25



LCAT- won innovation award in M&M Vendor conference in Feb 25



LATL Pune - team received BAL TPM Excellence consistency Award in BAVA Convention, Pune for 2024-25



Lumax Ituran Telematics honoured with "Hall of Fame" Award from DICV in December 2024



LATL Bangalore - received "Best QCD Performance Award" at HMSI Annual Supplier Convention Held in Mumbai in March, 2024



LATL Pantnagar - received the esteemed Special Award for TPM Achievement from Japan Institute of Plant Maintenance (JIPM) in March 2024



LATL Chakan - received the esteemed Award for Excellence In Consistent TPM Commitment from Japan Institute of Plant Maintenance (JIPM) in March 2024



Mr. Vikas Marwah, CEO - Lumax Auto Technologies Limited for being recognized as the Business Leader of the Year at the ET Ascent Awards



IAC India won the Part design & development award at Maruti Suzuki Vendor Conference 2024 at Antalya - Turkey in May 2024

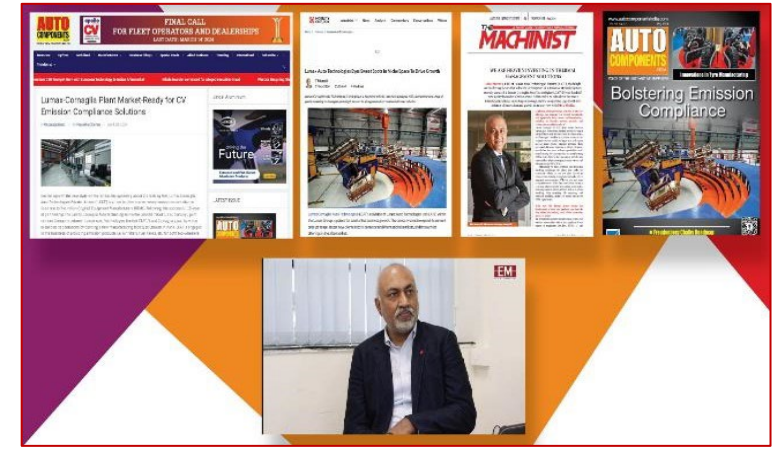


LMAT - two awards in categories - Inner parts Localisation and value Analysis at MSVC 2023 hosted by Maruti Suzuki India Ltd at Dubai in May 2023

Media Coverages & Visits



Mr. Anmol Jain, Managing Director



Mr. Vikas Marwah, CEO

Q3 & 9MFY25
Operational & Financial
Performance



Anmol Jain
Managing Director

Commenting on the Q3 & 9MFY25 performance of the company Mr. Anmol Jain, Managing Director for Lumax Auto Technologies Limited said,

“We are delighted to announce yet another milestone quarter, achieving our highest-ever quarterly revenue of Rs. 906 crores, marking an impressive year-on-year growth of 24%. Additionally, our EBITDA reached an all-time high of Rs. 127 crores, with margins at 14%. This outstanding performance has been driven by robust performance in standalone business with two main customers Bajaj Auto & HSI witnessing strong growth coupled with strong growth in subsidiaries.

This quarter witnessed better demand in the passenger vehicle (PV) segment, supported by a buoyant festive season and attractive OEM discounts that helped uplift consumer sentiment. The two-wheeler segment also experienced sustained momentum, driven by an improving consumer outlook with demand notably stronger in premium models compared to the entry-level segment. In response to evolving market dynamics, we remain committed to enhancing our product portfolio and increasing our kit values across both PV and two-wheeler categories. By introducing new and advanced offerings in collaboration with our esteemed joint venture partners from across the globe, we continue to strengthen our position as a key supplier to OEMs.

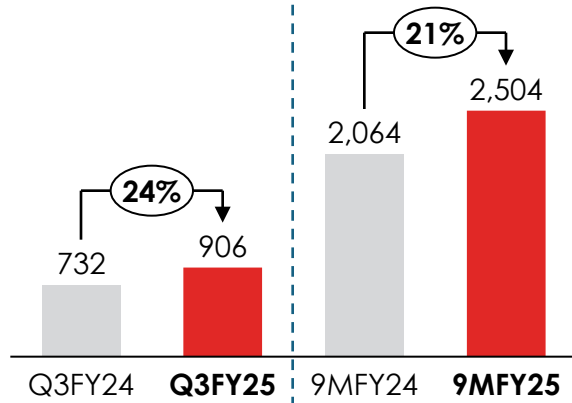
A significant milestone for us this quarter was the successful completion of our acquisition of Greenfuel Energy Solutions. This strategic move marks our entry into the alternate fuel space, aligning with our vision for sustainable and innovative growth. The acquisition not only complements our existing business but also presents an exciting opportunity to drive synergies and expand our capabilities in clean energy solutions.

As we move forward, we remain focused on delivering excellence through innovation, strategic growth initiatives, and strong execution. With a customer-centric approach and a commitment to sustainability, we are confident in our ability to drive long-term value for all stakeholders”

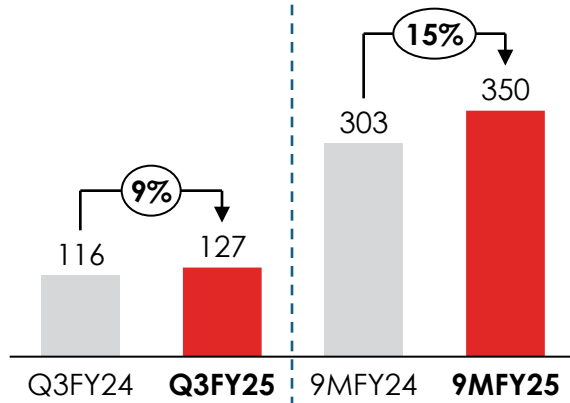
Q3 & 9MFY25 – Financial Snapshot



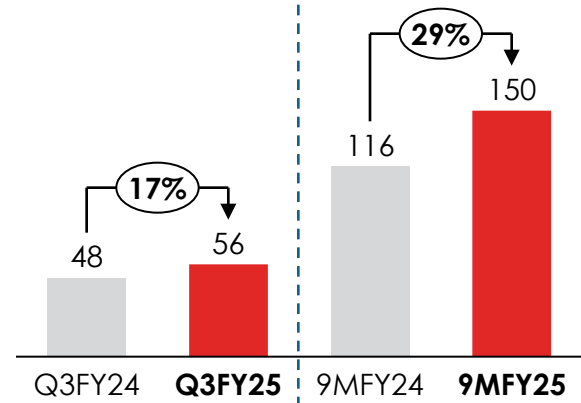
Revenue (Rs. In Crs)



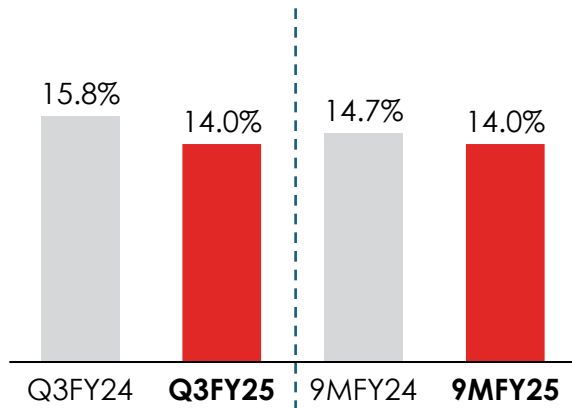
EBIDTA (Rs. In Crs)



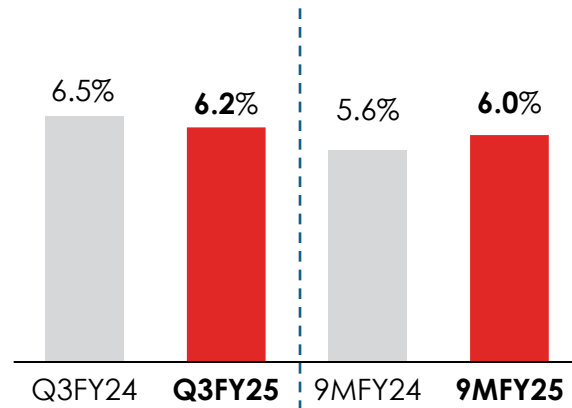
PAT before MI (Rs. In Crs)



EBIDTA Margin (%)



PAT Margin (%)



*Includes Financials for Greenfuel Energy Solutions Pvt. Ltd. from 26th November 2024 (acquisition date) to 31st December 2024 with revenue of Rs. 23 cr & EBITDA of Rs. 4 cr in Q3 & 9M FY25

9MFY25 – Product Category Wise Revenue Performance

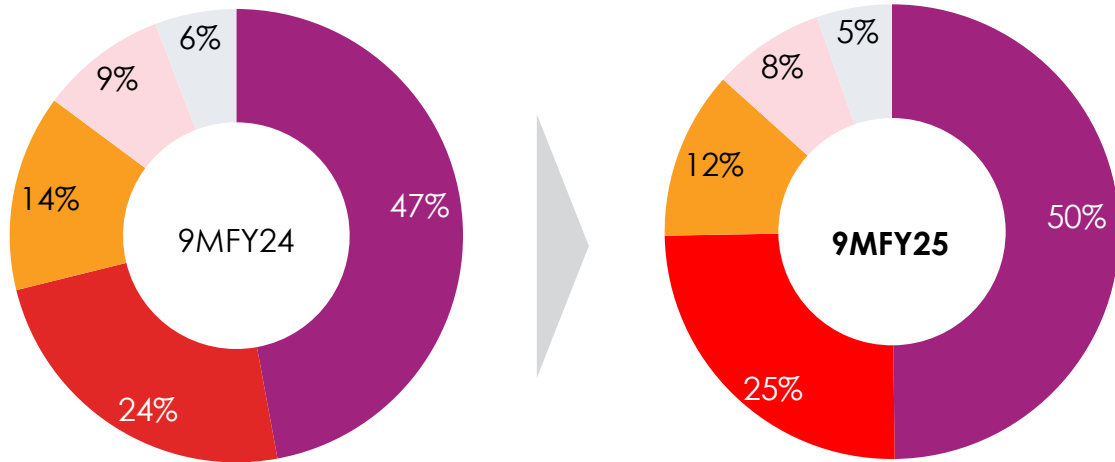


	9MFY24	9MFY25	Y-o-Y (%)	Percentage of Total Revenue
Advance Plastic	1,204	1,420	18%	57%
Mechatronics	38	67	75%	3%
Structures & Control Systems	471	512	9%	20%
Aftermarket	290	298	3%	12%
Alternate Fuels	-	23	+100%	1%
Others	61	184	+100%	7%
Total	2,064	2,504	21%	100%

9MFY25 – Segment & Customer wise Performance

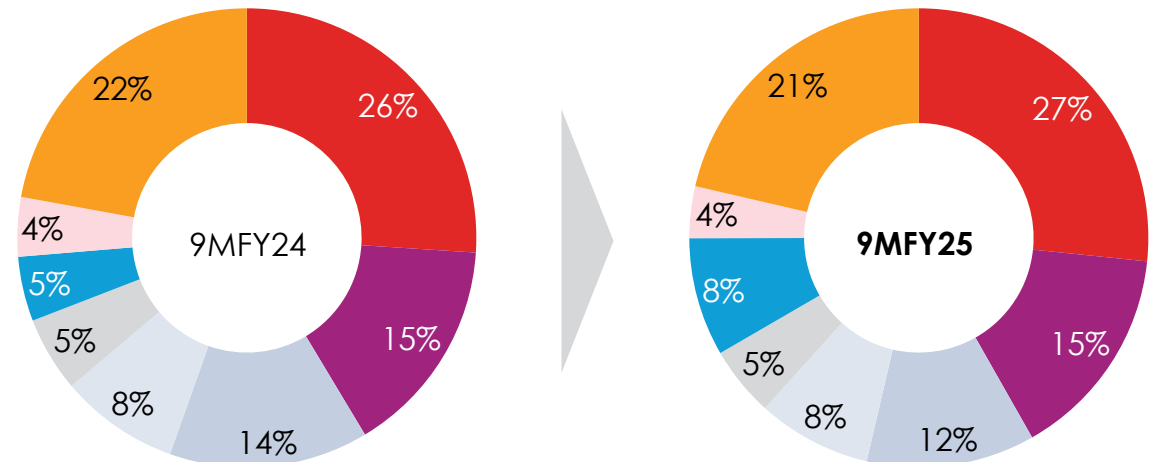


Segment Wise Revenue



PV 2/3 Wheeler After Market CV Others

Customer Wise Revenue



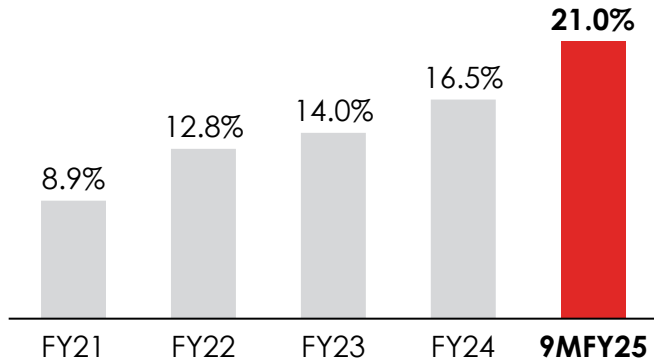
M&M After Market HMSI TATA Bajaj MSIL LIL Others (Misc)

*Includes Revenue for Greenfuel Energy Solutions from 26th November 2024 to 31st December 2024

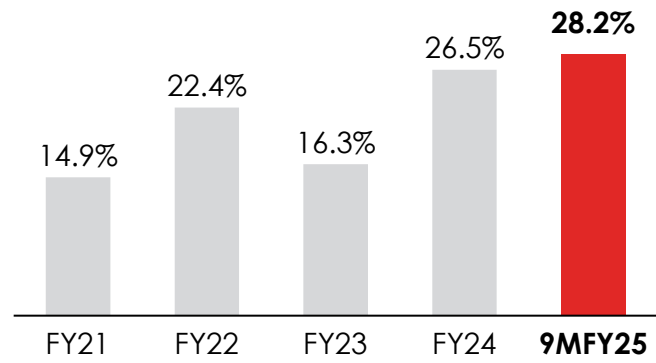
Key Consolidated Ratios



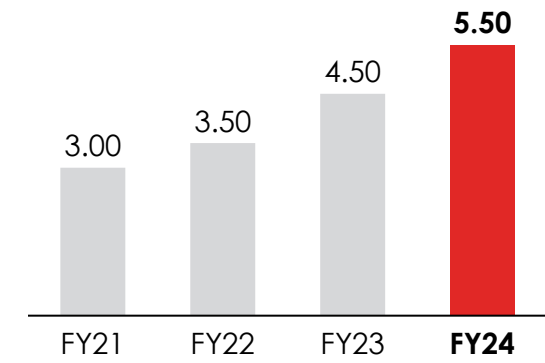
Adjusted RoE



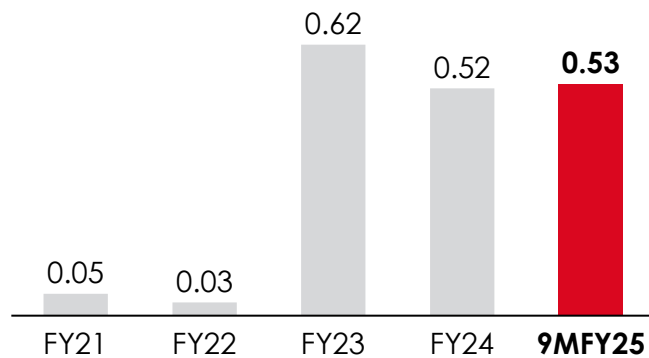
Adjusted RoCE



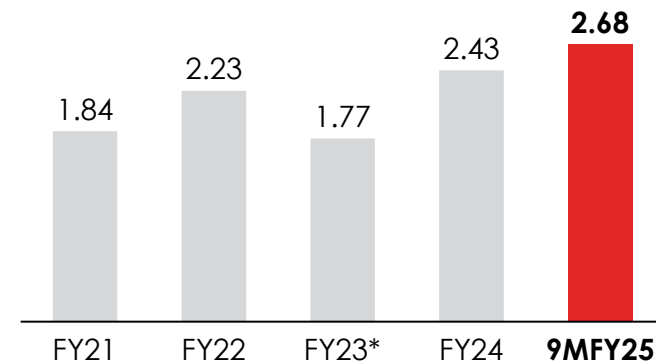
Dividend Per Share



Long Term Debt / Equity



Asset Turns (x)



*Dip in Asset turns on account of acquisition of IAC in Q4FY23

Consolidated Profit & Loss Statement*



Particulars (Rs. in Crores.)	Q3FY25	Q3FY24	Y-o-Y	Q2FY25	Q-o-Q	9MFY25	9MFY24	Y-o-Y
Revenue	905.6	732.5	24%	842.3	8%	2,503.8	2,064.4	21%
Raw Material Consumption	587.1	456.7		541.9		1,609.5	1,303.6	
Employee Expenses	120.1	93.9		113.9		341.9	271.3	
Other Expenses	80.5	76.0		84.2		244.2	213.3	
Other Income	8.9	9.9		15.4		41.7	27.2	
EBITDA	126.8	115.9	9%	117.6	8%	349.9	303.4	15%
EBITDA %	14.0%	15.8%		14.0%		14.0%	14.7%	
Depreciation	32.7	29.8		29.3		91.5	89.1	
Finance Cost	19.8	17.6		18.5		57.8	49.3	
Profit Before Tax	74.3	68.5	8%	69.8	6%	200.5	164.9	22%
Tax	18.2	20.5		18.0		51.1	49.3	
Profit After Tax (Before Minority Interest)	56.0	48.0	17%	51.8	8%	149.5	115.6	29%
Minority Interest	11.2	11.5		8.9		30.1	29.6	
Profit After Tax & Minority Interest	44.8	36.4	23%	42.9	5%	119.4	86.0	39%
PAT Margin%	4.9%	5.0%		5.1%		4.8%	4.2%	
EPS (In INR)	6.58	5.35		6.29		17.52	12.61	

*Includes Financials for Greenfuel Energy Solutions from 26th November 2024 to 31st December 2024

Balance Sheet



ASSETS (Rs. in Crores.)	Sep-24	Mar-24
Non-current assets		
Property, plant and equipment	570.5	575.5
Capital work-in-progress	70.1	35.8
Investment Property	22.6	22.9
Right-to-use asset	121.2	124.1
Goodwill	93.7	93.7
Intangible assets	186.6	197.8
Financial assets		
Investments	165.6	155.8
Loans	0.5	0.6
Others	33.4	29.8
Income Tax Assets	18.8	13.6
Other non-current assets	38.4	29.0
Deferred Tax Assets (net)	2.0	2.4
Sub-total - Non-Current Assets	1,323.4	1,281.0
Current assets		
Inventories	307.8	248.8
Financial assets		
Loans	5.0	1.2
Investments	270.5	250.0
Trade receivables	631.4	585.4
Cash and cash equivalents	82.7	51.0
Bank balances other than Cash	15.0	24.1
Other Financial Assets	52.9	53.8
Other current assets	132.8	103.4
Sub-total - Current Assets	1,498.2	1,317.8
TOTAL - ASSETS	2,821.6	2,598.8

EQUITY & LIABILITIES	Sep-24	Mar-24
Equity		
Equity Share capital	13.6	13.6
Non-Controlling Interest	240.3	223.7
Other equity	821.6	776.0
Sub-total - Shareholders' funds	1,075.6	1,013.3
LIABILITIES		
Non-current liabilities		
Financial liabilities		
Borrowings	202.0	321.7
Lease Liability	106.8	110.9
Provisions	2.8	2.7
Employee benefit liabilities	12.8	12.0
Deferred tax liabilities (net)	29.5	27.8
Sub-total - Non-current liabilities	354.0	475.0
Current liabilities		
Financial liabilities		
Borrowings	436.9	358.6
Lease Liability	22.3	18.8
Trade payables	598.5	485.8
Other financial liabilities	112.0	68.7
Employee benefit liabilities	23.3	19.9
Other current liabilities	194.5	158.5
Current tax liabilities	4.5	0.2
Sub-total - Current liabilities	1,392.0	1,110.5
TOTAL - EQUITY AND LIABILITIES	2,821.6	2,598.8

Cashflow Statement



Particulars (Rs. in Crores.)	H1FY25	H1FY24
PBT	126.3	96.4
Adjustments	65.4	75.4
Operating profit before working capital changes	191.7	171.8
Changes in working capital	-9.1	-23.3
Cash generated from operations	182.6	148.5
Direct taxes paid (net of refund)	-32.5	-35.9
Net Cash from Operating Activities	150.2	112.7
Net Cash from Investing Activities	-29.0	-115.2
Net Cash from Financing Activities	-89.4	-16.7
Net Change in cash and cash equivalents	31.7	-19.2
Opening Cash Balance	51.0	74.6
Closing Cash Balance	82.8	55.4

Annexures

Strong JV Partners



IAC India

Mannoh

Cornaglia

Products

Vehicle Interior Systems & Components

Shift levers (AT and MT), Spare wheel carriers, Forged cutting products

Air filters, Plastic fuel tanks, and Urea tank

No of Plants

5

3

2

Key Customers

M&M & MSIL

MSIL, M&M, Toyota, TATA, Honda, Daimler

Tata, Toyota, Volkswagen, FIAT, M&M, MG

Order Book

Rs 550 Crores

Rs 60 crores

Rs 30 crores

Key Financials (FY24) (crs)

Revenue	EBITDA	PAT
886	176	61

Revenue	EBITDA	PAT
353	61	39

Revenue	EBITDA	PAT
157	28	13

Shareholding (%)

75%

55%

50%

Strong JV Partners



ALPSALPINE

Alps Alpine

ituran

Ituran

yokowo

Yokowo

Products	Electric devices and components	Telematics	Antennas & other vehicle communication products																		
No of Plants	1	1	1																		
Key Customers	MSIL, HMSI	Dialmer	HCIL, Toyota																		
Order Book	Rs 110 Crores	-	Rs 50 crores																		
Key Financials (FY24) (crs)	<table border="1"> <tr> <td>Revenue</td> <td>EBITDA</td> <td>PAT</td> </tr> <tr> <td>31</td> <td>3</td> <td>1</td> </tr> </table>	Revenue	EBITDA	PAT	31	3	1	<table border="1"> <tr> <td>Revenue</td> <td>EBITDA</td> <td>PAT</td> </tr> <tr> <td>20</td> <td>3</td> <td>2</td> </tr> </table>	Revenue	EBITDA	PAT	20	3	2	<table border="1"> <tr> <td>Revenue</td> <td>EBITDA</td> <td>PAT</td> </tr> <tr> <td>11</td> <td>-3</td> <td>-4</td> </tr> </table>	Revenue	EBITDA	PAT	11	-3	-4
Revenue	EBITDA	PAT																			
31	3	1																			
Revenue	EBITDA	PAT																			
20	3	2																			
Revenue	EBITDA	PAT																			
11	-3	-4																			
Shareholding (%)	50%	50%	50%																		

Strong JV Partners



JOPP



FAE



Greenfuel Energy

Products

Control Housing, Monostable E-shifters, Smart Actuator, Shift Tower

Oxygen Sensors

CNG Products

No of Plants

1

1

2

Key Customers

M&M, MSIL

REML, M&M

MSIL & Tata

Order Book

Rs 40 Crores

Rs 60 Crores

Rs 200 crores

**Key Financials (FY24)
(crs)**

Revenue	EBITDA	PAT
8	-3	-3

Revenue	EBITDA	PAT
3	-0.4	-4

Acquired on 26 November, 2024

Shareholding (%)

50%

84%

60%

**About
DK Jain Group**

Our Vision

Building an admired high performance **Global Organization** in whom all stakeholders have absolute trust

Our Purpose

We deliver **Pride and Progress with Positivity**

Our Values

Respect **Integrity**
Passion **Excellence**

About DK Jain Group

8

Presence over **Eight Decades**

Leader in Automotive Lighting, Gear Shifters & Vehicle Interior Solutions



16 Entities in 8 States
1 Overseas Entity in Czech Republic

40 Manufacturing Facilities across India



6 Engineering Centers in India, Taiwan & Czech Republic

Over **12,000 Employees**



Long standing **OEM Relationships**

Lumax Group - Two Listed Entities



Lumax Auto Technologies

Partnerships & JV's

- ✓ Cornaglia – Italy
- ✓ Mannoh – Japan
- ✓ Ituran – Israel
- ✓ FAE – Spain
- ✓ YOKOWO - Japan
- ✓ JOPP - Germany
- ✓ Alps Alpine – Japan
- ✓ IAC – USA
- ✓ Greenfuel - India



Lumax Industries

Partnerships & JV's

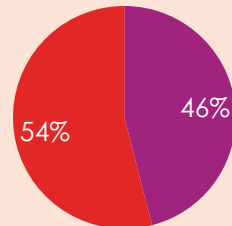
- ✓ Stanley – Japan
- ✓ SL Corporation - Korea

Product Segments

- Advance Plastic
- Mechatronics
- Structures & Control Systems
- Aftermarket
- Alternate Fuels

Group Revenues

- Lumax Industries
- Lumax Auto Technologies



FY24
Rs. 5,732 Crores

Product Segments

- End-to-end Automotive Lighting Solutions
- HVAC Panels and other electronic components

For further information, please contact:

Company



Lumax Auto Technologies Limited
CIN: L31909DL1981PLC349793

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Investor Relations



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