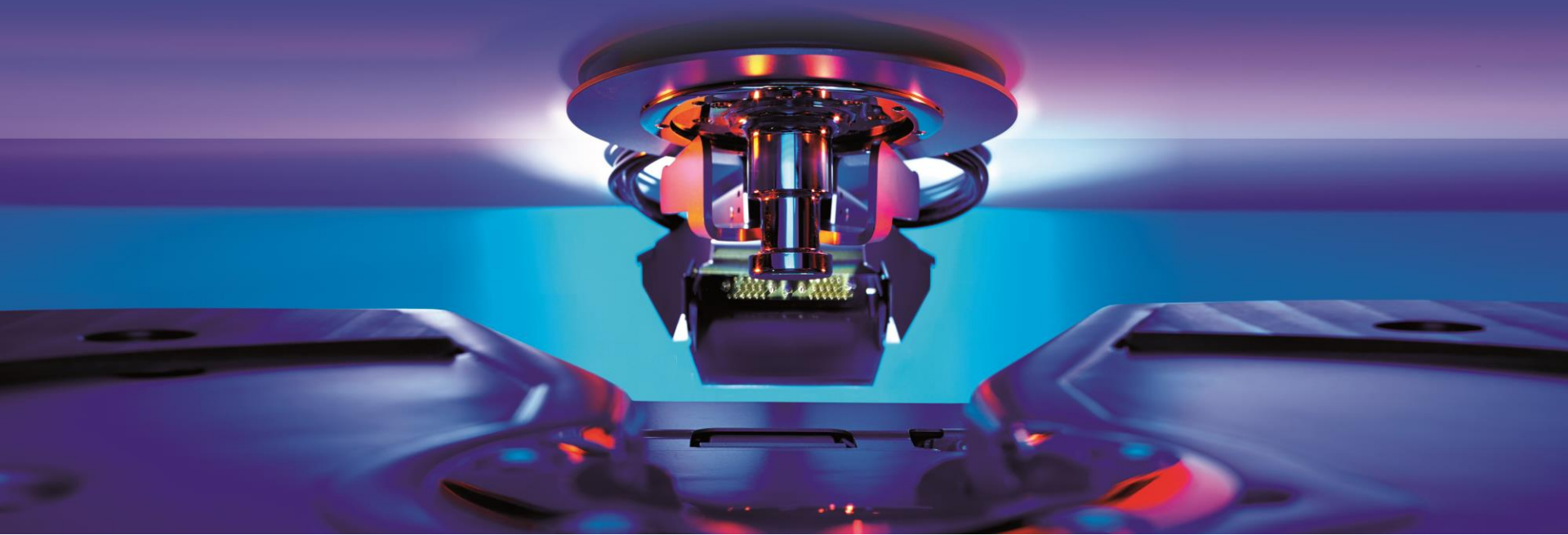


# Company presentation

Update 9M 2017



**JOST**

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## Company overview and key highlights

**Lars Brorsen**



**Christoph Hobo**



**Dr. Ralf Eichler**



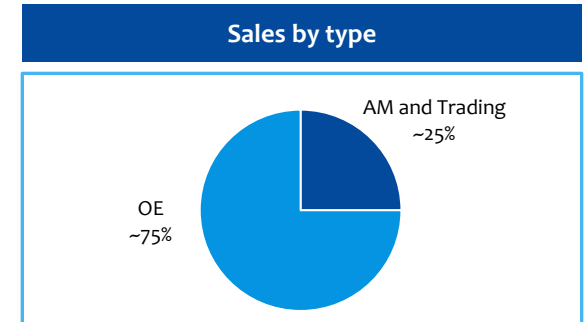
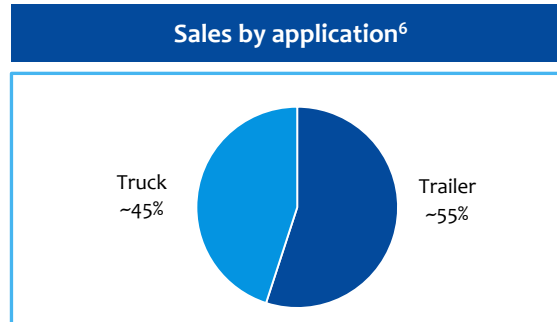
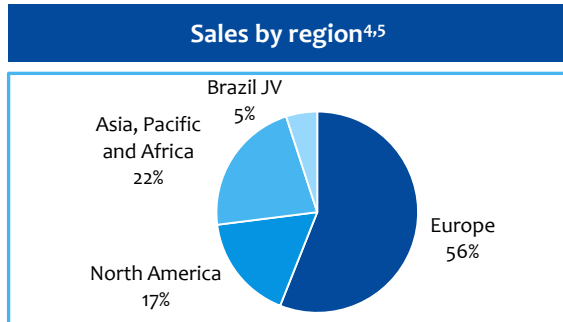
Position	Chief Executive Officer	Chief Financial Officer	Chief Operating Officer
Work experience	<ul style="list-style-type: none"> <li>* CEO of JOST since 2000</li> <li>* Managing Director of Smart (Daimler Group), 1997 – 2000</li> <li>* TRW, Vice President and Managing Director as well as various other positions, 1978 – 1996</li> </ul>	<ul style="list-style-type: none"> <li>* CFO of JOST since 2016</li> <li>* Executive Board Member of Aktivoptik Service AG, 2013 – 2016</li> <li>* Principal at Cinven, 2011 – 2013 and 2004 – 2010</li> <li>* Managing Director of Rocket Internet Japan, 2010 – 2012</li> </ul>	<ul style="list-style-type: none"> <li>* COO of JOST since 2010</li> <li>* Several managing director positions in European JOST subsidiaries, 2000 – 2010</li> <li>* Head of profit center LUK Fahrzeughydraulik, 1998 – 2000</li> </ul>
Key responsibilities	<ul style="list-style-type: none"> <li>* Marketing / Sales</li> <li>* Quality / Environment</li> <li>* Human Resources</li> <li>* Research &amp; Development</li> </ul>	<ul style="list-style-type: none"> <li>* Finance and Treasury</li> <li>* Accounting and Reporting</li> <li>* Controlling and Investor Relations</li> <li>* IT</li> <li>* Legal and Compliance</li> </ul>	<ul style="list-style-type: none"> <li>* Purchasing</li> <li>* Production</li> <li>* Logistics</li> </ul>

Source: Company information

# JOST – leading global supplier of safety critical truck and trailer solutions



FY 2016			9M 2017 update	
Sales / CAGR (14-16A)	Adj. EBIT <sup>2</sup> / margin	CF / Cash conversion <sup>3</sup>	Sales / y-o-y growth	Adj. EBIT <sup>2</sup> / margin
€634m / 3.6% <sup>1</sup>	€62m / 9.8%	€60m / 76.4%	€533m / 9.5%	€64m / 12.0%



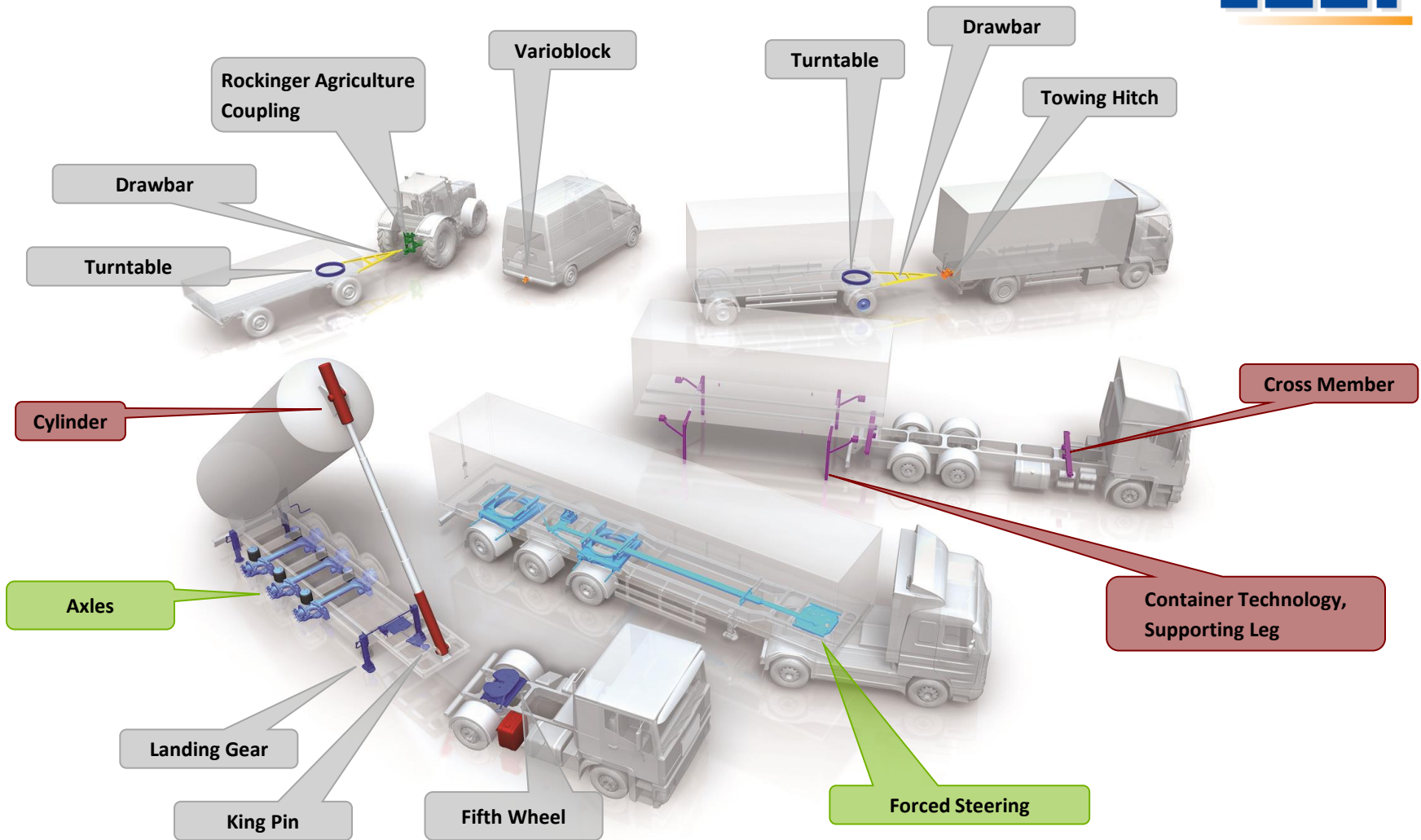
## Product portfolio

Brands			
Systems	Vehicle interface (74% sales)	Handling solution (10% sales) <sup>7</sup>	Manoeuvring (16% sales)
Product examples			

JOST has ~55% market share globally in products representing 64% of sales<sup>8</sup>

<sup>1</sup> CAGR assuming MBTAS reflected in 2014 sales, <sup>2</sup> Excluding PPA D&A and exceptional items, including pro rata net income from Brazil JV, <sup>3</sup> Cash flow (CF) defined as adjusted EBITDA – capex; cash conversion defined as (adjusted EBITDA – capex)/adjusted EBITDA, <sup>4</sup> Sales by region including consolidation effects, <sup>5</sup> Sales by region represent global sales of JOST's branded products including 100% of Brazil JV, which had sales of €29m in 2016, <sup>6</sup> Includes aftermarket and trading, <sup>7</sup> Including other, <sup>8</sup> Fifth wheel: JOST 54%, Other 46%; Landing gear: JOST 56%, Other 44%

# Overview of our main products



Vehicle interface (74% sales)

Handling solution (10% sales)<sup>7</sup>

Manoeuvring (16% sales)

### Key investment highlights

- 1 **Leadership – Global leadership in branded products**
- 2 **Attractive company growth – Market outperformance: upselling, market expansion and bolt-on M&A**
- 3 **Market growth – Sustained growth on the back of strong fundamentals**
- 4 **Diversification – High aftermarket content and high diversification by customer and geography**
- 5 **Business model – Flexible and asset-light business model**
- 6 **Track record – Industry-leading margins and cash generation profile**

Additional investment back up highlights in appendix

# 1 Global leadership in branded products

One of the leading global suppliers of truck and trailer systems with high market share in core segments



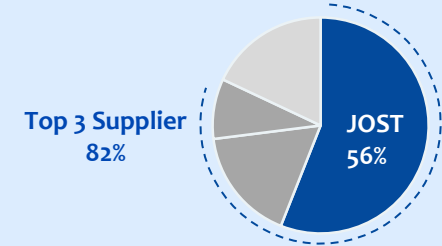
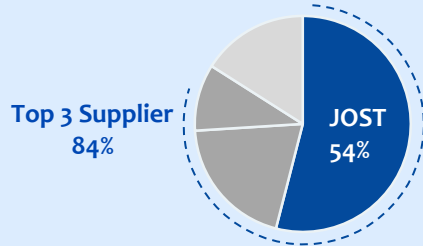
## JOST has a leading market position in Vehicle Interface systems

>50% global market share in articulated truck trailer combinations market

### Fifth wheel

### Landing gear

Global market share<sup>1</sup>



Market position by geography<sup>1</sup>



#1 player in key products<sup>3</sup> that account for 64% of total sales

<sup>1</sup> By sales

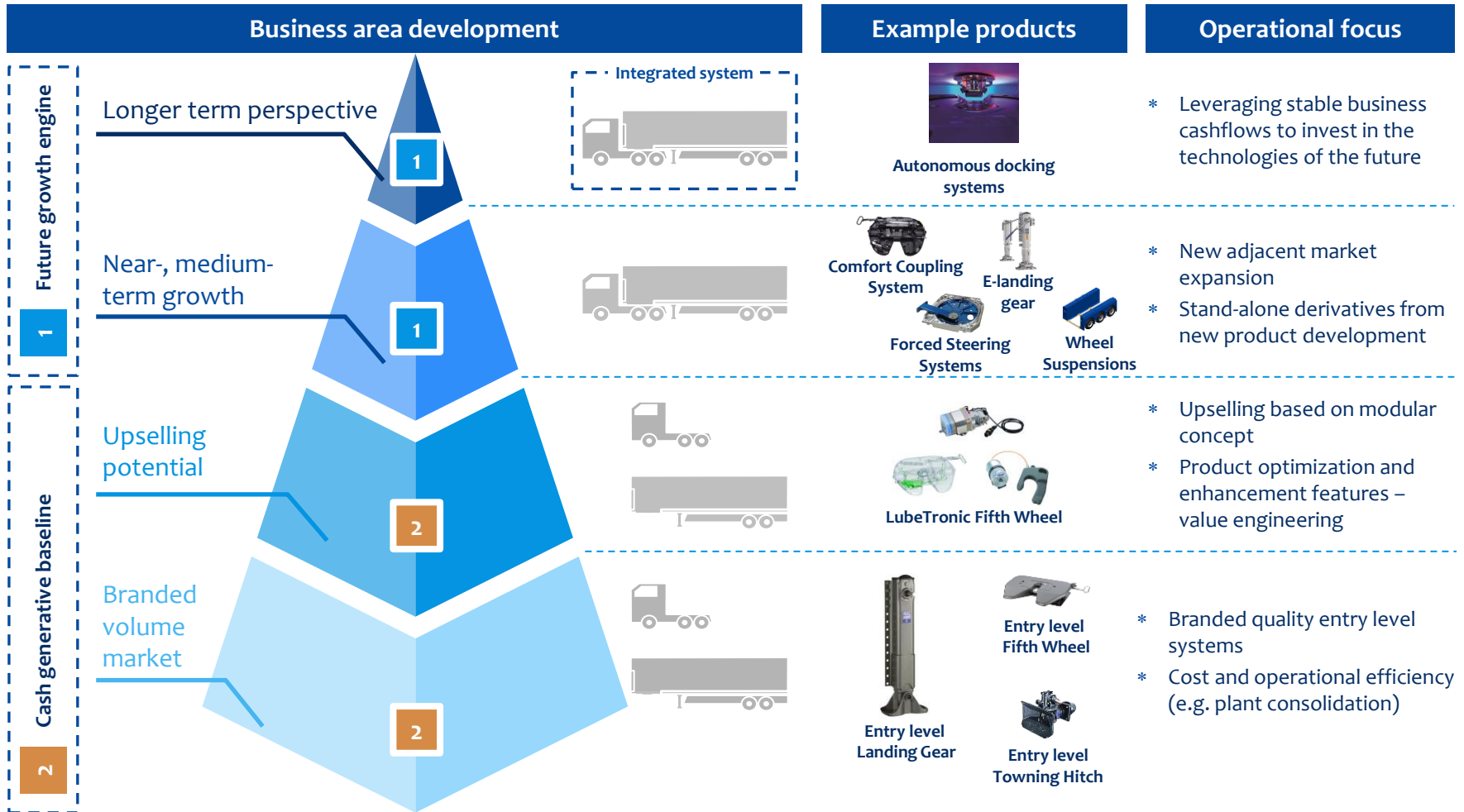
<sup>2</sup> Includes Brazil JV

<sup>3</sup> Fifth wheel and landing gear



















## Market outperformance: upselling, market expansion and bolt-on M&A

JOST's strategy is focused on further enhancing its cash generative baseline business while developing advanced solution systems to provide long-term growth





### JOST's approach to outperform the market

<p><b>1</b></p> <p>Higher content per product</p>	<ul style="list-style-type: none"> <li>✓ Upselling through innovations</li> </ul>	<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>Manual landing gear</p>  </div> <div style="text-align: center;"> <p>E-Drive landing gear</p>  </div> </div> <div style="border: 1px dashed black; padding: 5px; margin: 5px 0;"> <p>Increased content compared to base version (e.g &gt;4x for landing gear)</p> </div> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>Manual fifth wheel</p>  </div> <div style="text-align: center;"> <p>LubeTronic fifth wheel</p>  </div> <div style="text-align: center;"> <p>Comfort Coupling System</p>  </div> </div>				
<p><b>2</b></p> <p>Growth initiatives</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="writing-mode: vertical-rl; transform: rotate(180deg);">Region</td> <td> <ul style="list-style-type: none"> <li>✓ Growth in US: gain market share with OEMs</li> <li>✓ Localisation of Rockinger and Tridec in China</li> </ul> </td> </tr> <tr> <td style="writing-mode: vertical-rl; transform: rotate(180deg);">Product</td> <td> <ul style="list-style-type: none"> <li>✓ Growth in axles: expand in aftermarket</li> <li>✓ Growth in hydraulics: expand capacity</li> </ul> </td> </tr> </table>	Region	<ul style="list-style-type: none"> <li>✓ Growth in US: gain market share with OEMs</li> <li>✓ Localisation of Rockinger and Tridec in China</li> </ul>	Product	<ul style="list-style-type: none"> <li>✓ Growth in axles: expand in aftermarket</li> <li>✓ Growth in hydraulics: expand capacity</li> </ul>	<div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>By region</p>     </div> <div style="text-align: center;"> <p>By product</p>   </div> </div>
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Product	<ul style="list-style-type: none"> <li>✓ Growth in axles: expand in aftermarket</li> <li>✓ Growth in hydraulics: expand capacity</li> </ul>					
<p><b>3</b></p> <p>Accretive M&amp;A</p>	<ul style="list-style-type: none"> <li>✓ Strong M&amp;A track record</li> <li>✓ Potential add-on M&amp;A opportunities</li> </ul>	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  </div> <div style="text-align: center;">  </div> <div style="text-align: center;">  </div> </div> <div style="display: flex; justify-content: space-around; align-items: center; margin-top: 20px;"> <div style="text-align: center;">  </div> <div style="text-align: center;">  <p>Mercedes-Benz Trailer Axle Systems</p> </div> </div>				

### 3 Sustained growth on the back of strong fundamentals

Truck and trailer in all other regions are expected to outperform GDP growth on the back of favorable long-term economic factors



#### Macro factors supporting robust long-term sector growth

1

Positive GDP and freight growth

2

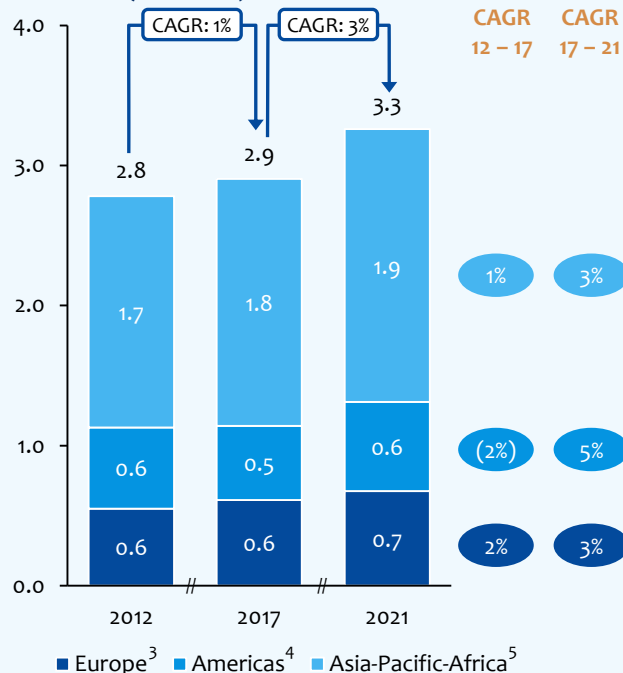
Growing share of road transportation

3

Regulation driving renewal of truck and trailer fleets

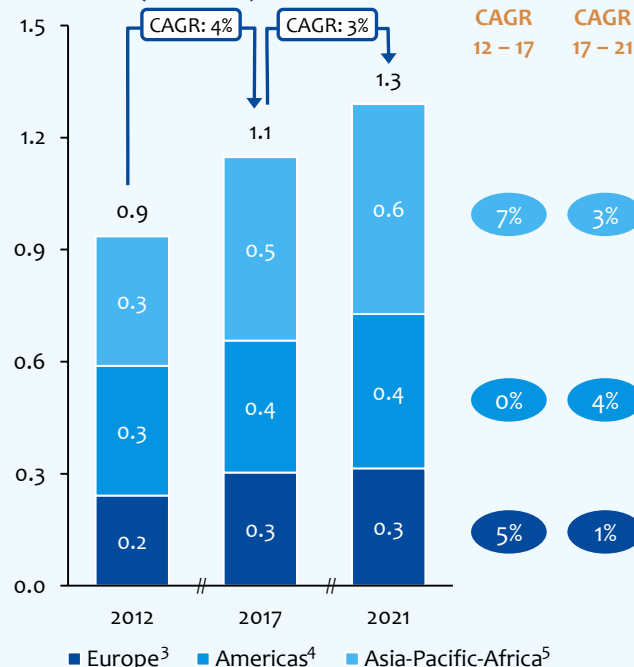
#### Truck production development

Global truck<sup>1</sup> production by region, 2012 – 21 (m units)



#### Trailer production development

Global trailer<sup>2</sup> production by region, 2012 – 21 (m units)



#### Recent trailer development

##### Press reports

“Policy changes impact Chinese heavy vehicle market”  
*Global Trailer Magazine, June 2017*

“US trailer sales going up”  
*Global Trailer Magazine, June 2017*

“EU commercial vehicle market on the rise”  
*Global Trailer Magazine, June 2017*

<sup>1</sup> Includes medium duty trucks (6-15 to GVW) and heavy duty trucks (>15 to GVW)

<sup>2</sup> Includes medium and heavy duty commercial vehicle trailers

<sup>3</sup> Western Europe, Eastern Europe, Russia

<sup>4</sup> North America, Brazil, Rest of Latin America

<sup>5</sup> China, India, Asia Pacific, RoW

Source: Roland Berger 2017

## Sustained growth on the back of strong fundamentals

China's newly implemented truck overload restrictions positively impact truck and trailer demand in China



### Truck overload restrictions

- \* Implementation of new regulation on truck overload restrictions (GB1589)
  - \* No transition phase permitted
- \* New restrictions on truck and trailer dimensions:
  - \* Length of maximum 22.0 meters of truck and trailer combination
- \* For example, car carriage capacity significantly drops
- \* From c.22 cars per vehicle to 6 – 10 cars per vehicle depending<sup>1</sup>
- \* The key positive implications for JOST:
  - \* **Higher number of swivel points** in a truck (eg replacement of rigid with articulated trucks)
  - \* **Replacement demand** for existing fleet
  - \* Higher **focus on quality and safety** of couplings

### Traditional car carrier in China



### Car carriage capacity

#### Number of vehicles



New China policies are expected to provide short- and long-term support to the market

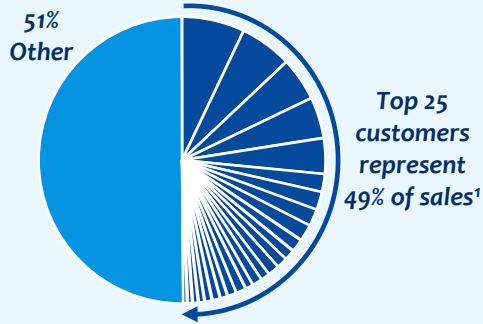
<sup>1</sup> Semitrailer with a capacity of 6 cars; drawbar trailer with a capacity of 10 cars  
Source: Roland Berger 2017

# High aftermarket content and high diversification by customer and geography

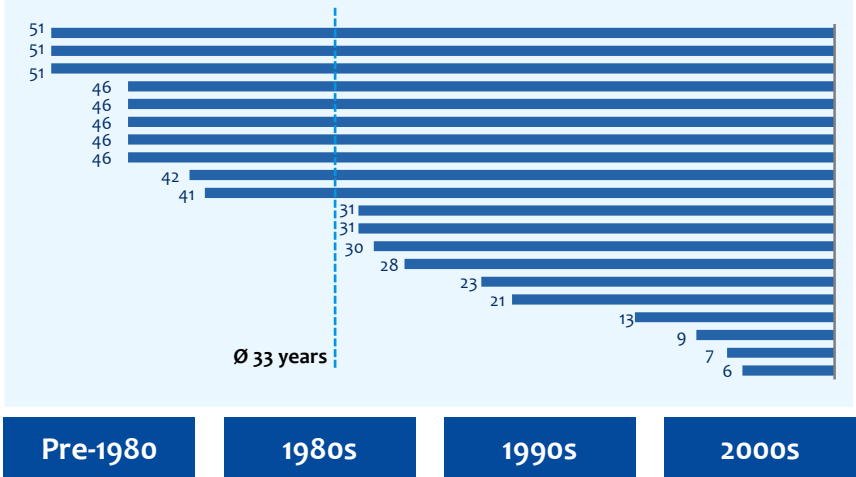
High resilience due to high customers fragmentation and leading AM business



## High customer fragmentation



## Average customer relationship of more than 30 years<sup>1, 2</sup>

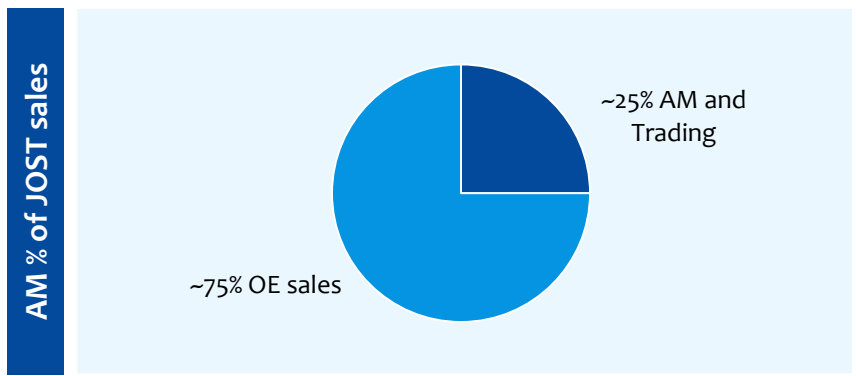


## Attractive AM opportunity

Product	Image
Fifth Wheel	
Landing Gear	

AM value vs OE <sup>3</sup>	Value
Fifth Wheel	50%
Landing Gear	200 – 300%



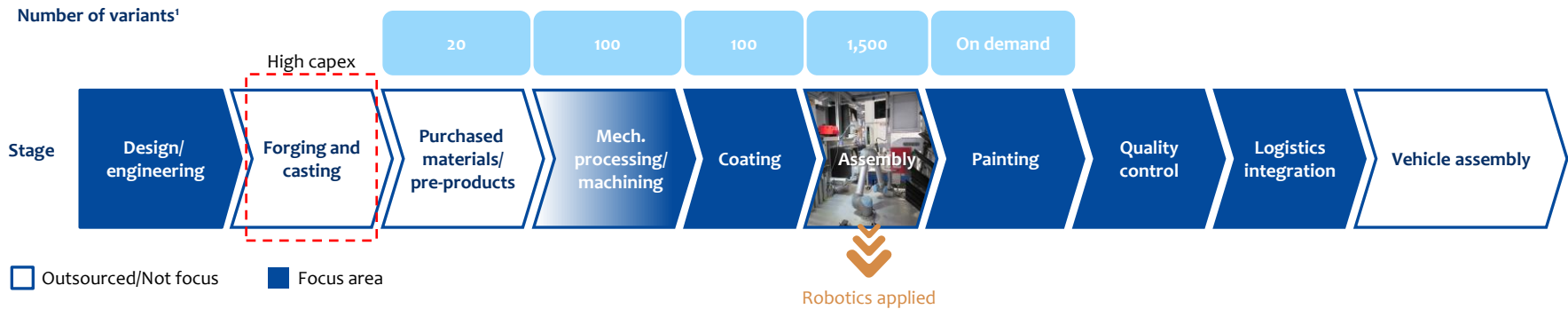
<sup>1</sup> Including Brazil JV  
<sup>2</sup> Top 20 customers with average relationship of 33 years represent 45% of sales  
<sup>3</sup> Value based

## 5 Flexible and asset light business model

Ability to quickly adapt to changing market environment due to asset light and efficient supply and production platform

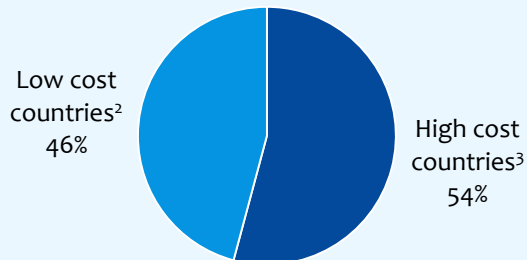


### Key parts of the value chain



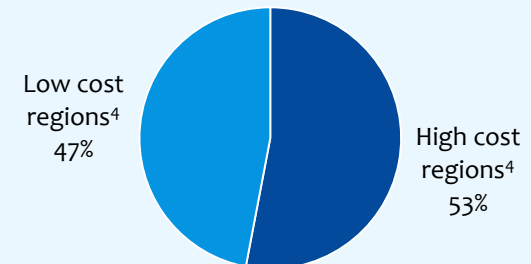
### Employees located in low cost countries

#### Share of employees by plant location



### Purchasing from low cost countries<sup>4</sup>

#### Share of purchasing by region



<sup>1</sup> On the example of fifth wheel

<sup>2</sup> Low-cost countries include Russia, Poland, Hungary, Portugal, South Africa, China, India

<sup>3</sup> High-cost countries include Germany, France, Spain, Italy, UK, The Netherlands, Australia, USA, Singapore and Japan

<sup>4</sup> High-cost regions include Western Europe and North America; Low-cost regions include Eastern Europe, Asia and Brazil

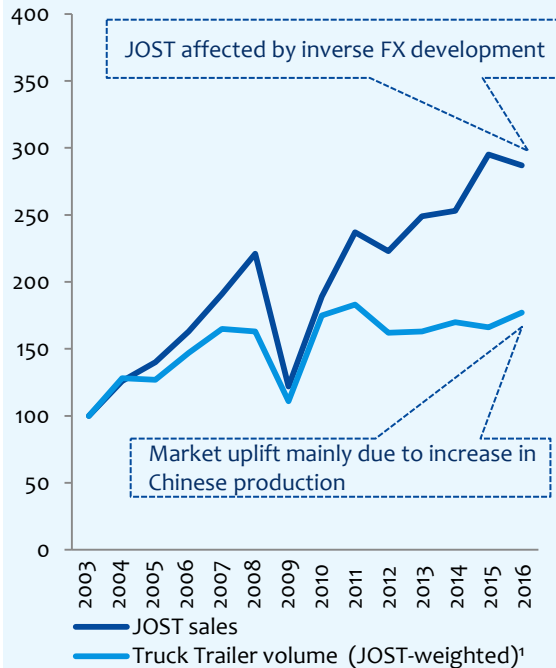
## Industry-leading margins and cash generation profile

JOST has continuously outperformed the truck market since 2003 showing high profitability and strong cash generation



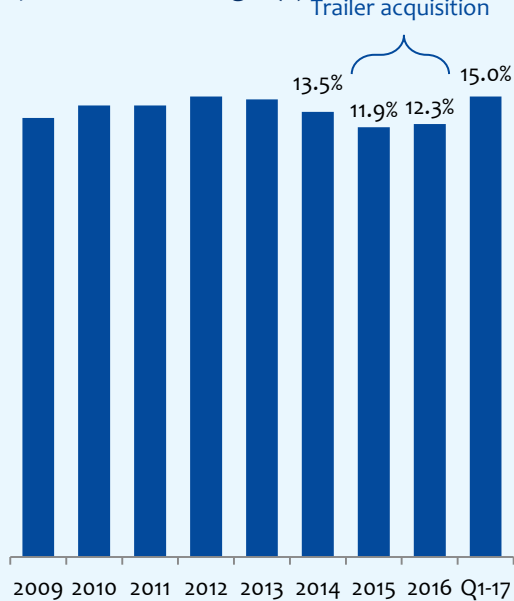
### JOST's performance over time

Indexed to 2003



### Strong margin resilience

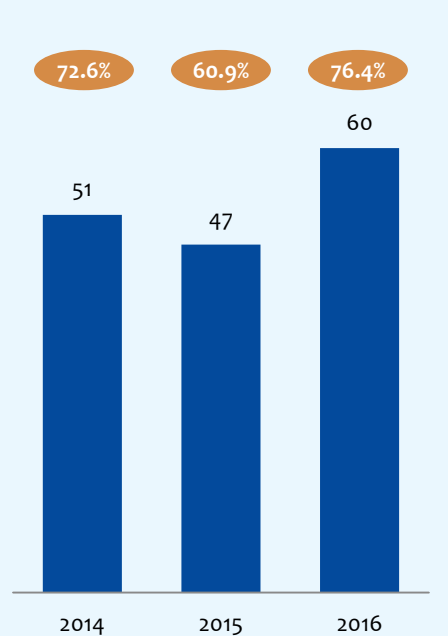
Adjusted EBITDA margin (%)



### High cash flow generation

Cash conversion<sup>2</sup>

Cash flow<sup>2</sup>



JOST has continuously outperformed the truck market since 2003

<sup>1</sup> Weighted by approximate weight of truck and trailer revenues

<sup>2</sup> Cash flow defined as Adjusted EBITDA-Capex and cash conversion defined as (Adjusted EBITDA-Capex) / Adjusted EBITDA

## Key financials

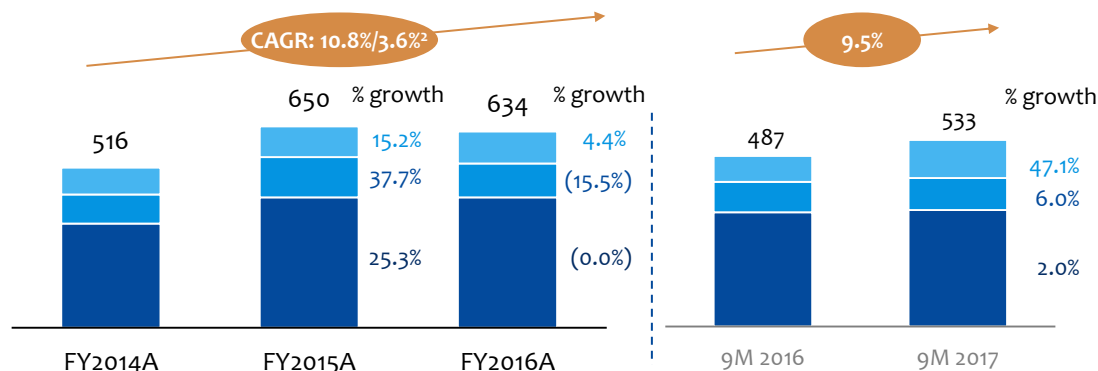


# 9M 2017 best first nine months in JOST's history with strong improvement in margins across all regions



## Sales split by geography<sup>1</sup> (€m)

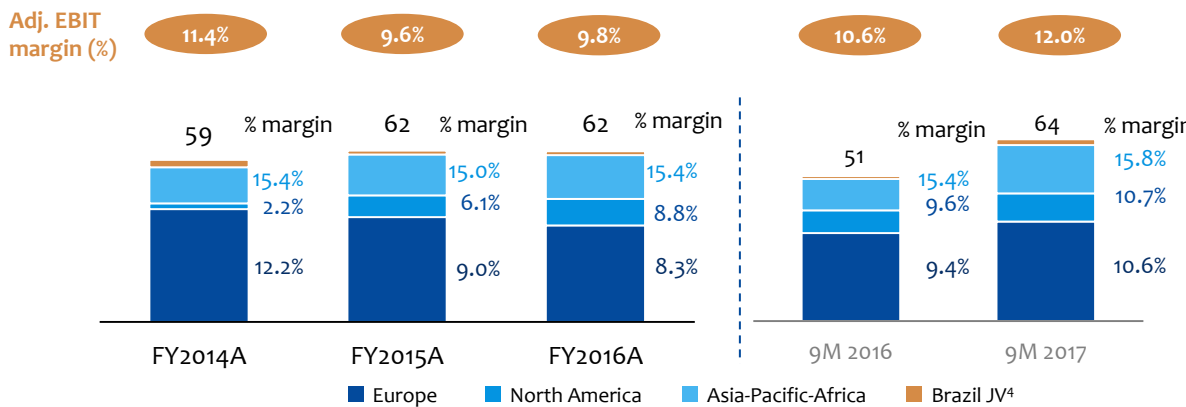
## 9M 2017 commentary



✓ Record 9M sales performance, Growth driven by high activity level in APA and recovering truck market in North America

## Adjusted EBIT split by geography<sup>3</sup> (€m)

## 9M 2017 commentary



✓ Adj. EBIT grew by 24% resulting in margin expanding to 12% in 9M 2017

✓ Main reasons: completed integration of axle business, efficiency improvements, favorable mix effects and operating leverage benefits

<sup>1</sup> Sales split by origin

<sup>2</sup> CAGR assuming MBTAS reflected in 2014 sales

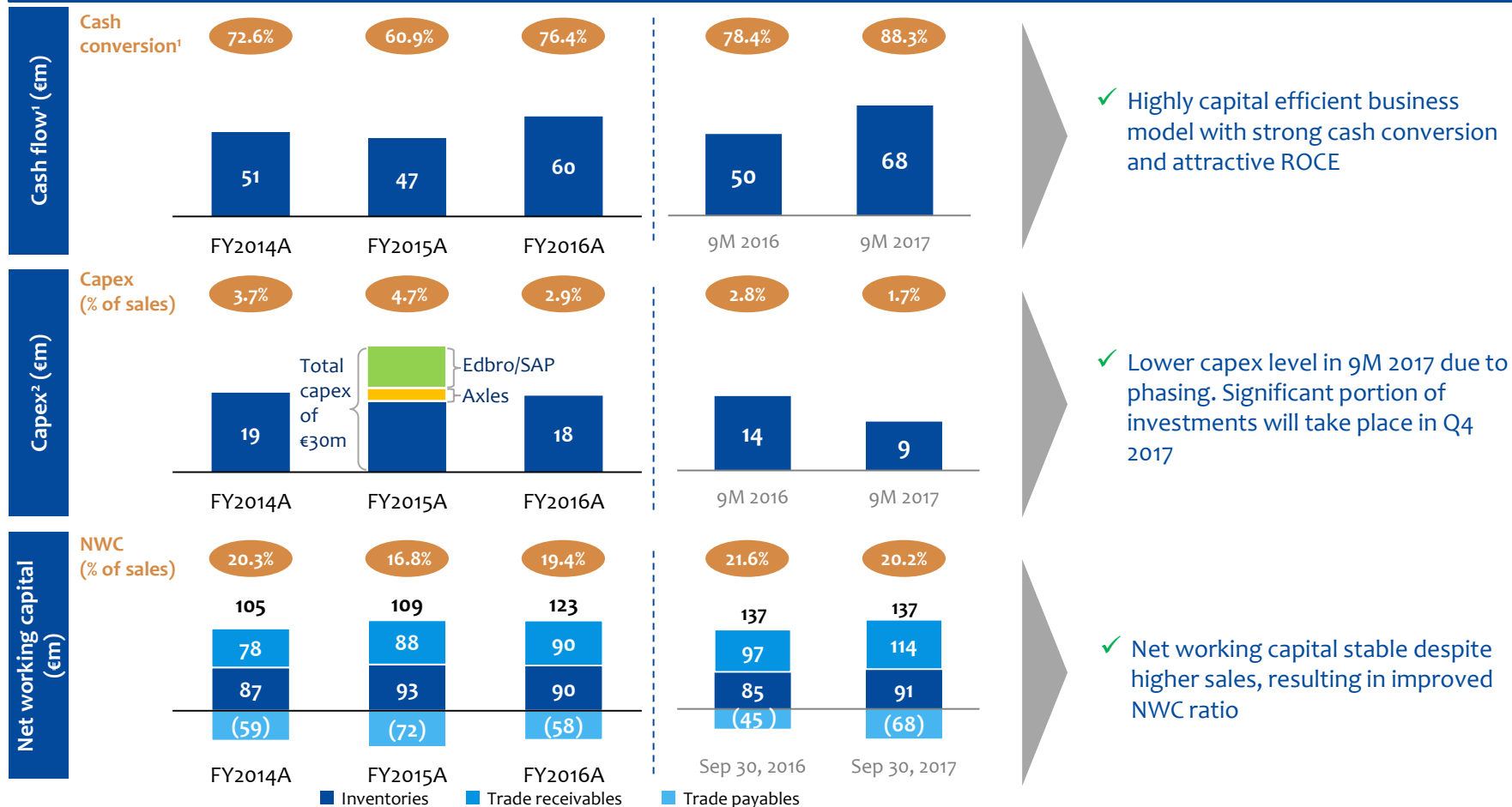
<sup>3</sup> Adjusted EBIT split by origin, including pro-rata net income from Brazil JV

<sup>4</sup> Pro-rata net income from Brazil JV not allocated to segments and therefore shown separately

# Strong cash generation profile supported by low capex spend and disciplined working capital planning



## Key financials overview



✓ Highly capital efficient business model with strong cash conversion and attractive ROCE

✓ Lower capex level in 9M 2017 due to phasing. Significant portion of investments will take place in Q4 2017

✓ Net working capital stable despite higher sales, resulting in improved NWC ratio

<sup>1</sup> Cash flow defined as adjusted EBITDA – capex; cash conversion defined as (adjusted EBITDA – capex)/adjusted EBITDA

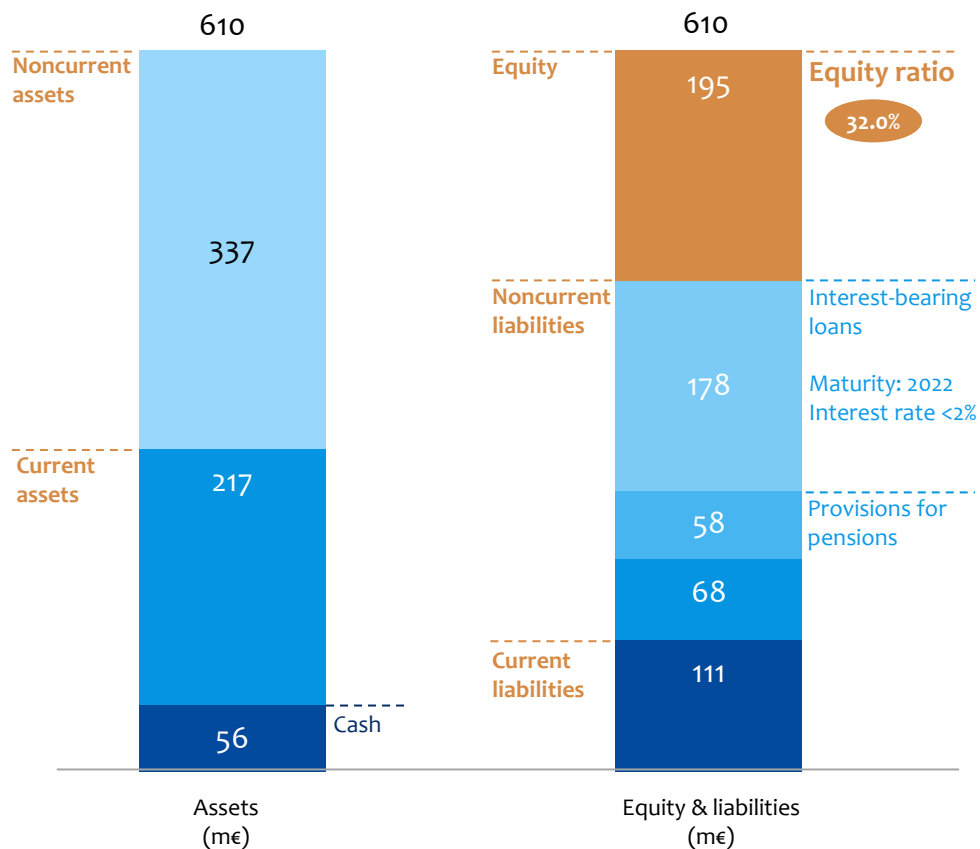
<sup>2</sup> Capex calculated as payments to acquire property, plant and equipment as well as intangible assets

Source: Company information

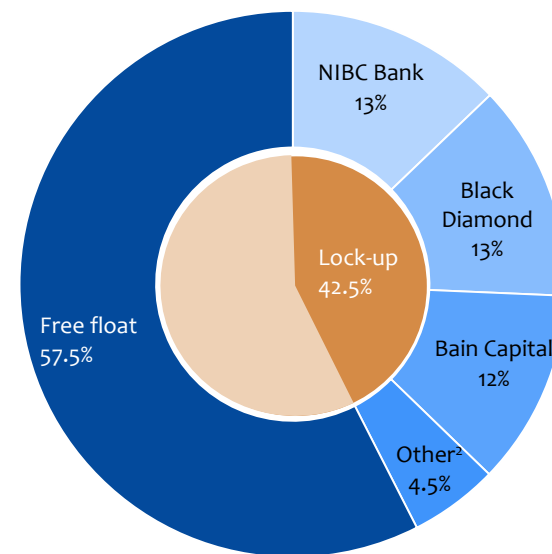
# Balance sheet strengthened



## Balance sheet as at September 30, 2017



## Shareholder structure



ROCE<sup>1</sup> increase by 1.7%-points to 19.7%

<sup>1</sup> ROCE=LTM adj. EBIT / interest bearing capital employed (interest bearing capital: equity + financial liabilities – cash + provisions for pensions)

<sup>2</sup> Other: Cinven, current and former members of the Management and Supervisory Board, other

## Listing on Frankfurt stock exchange

- \* 4.875m new shares issued
- \* Placement price €27.00
- \* €132m raised from capital increase
- \* +41% share price increase by end of Q3 2017

Sales +10% to €533m

Adj. EBIT +24% to €64m

Adj. net income +76% to €41m

Equity ratio 32%

## Attractive new financing

- \* €180m term loan raised, maturing in 2022
- \* Significantly reduced leverage and interest expenses

## Outlook 2017 raised

- \* High single-digit sales growth rate
- \* Moderate double-digit adj. EBIT growth rate

## Outlook 2017 – raised



	FY 2016 (€m)	2016 (% of sales)	Outlook 2017 (old)	Outlook 2017 (new)
Sales	634		Mid single digit growth	High single digit growth
Adjusted EBIT (% margin)	62	9.8%	High single digit growth	Moderate double digit growth
Capex <sup>1</sup> (% of sales)	18	2.9%	2.0 – 2.5% of sales	2.0 – 2.5% of sales
Net working capital (% of sales)	123	19.4%	<20%	<20%
Leverage	3.5x		~ 1.5x	< 1.5x

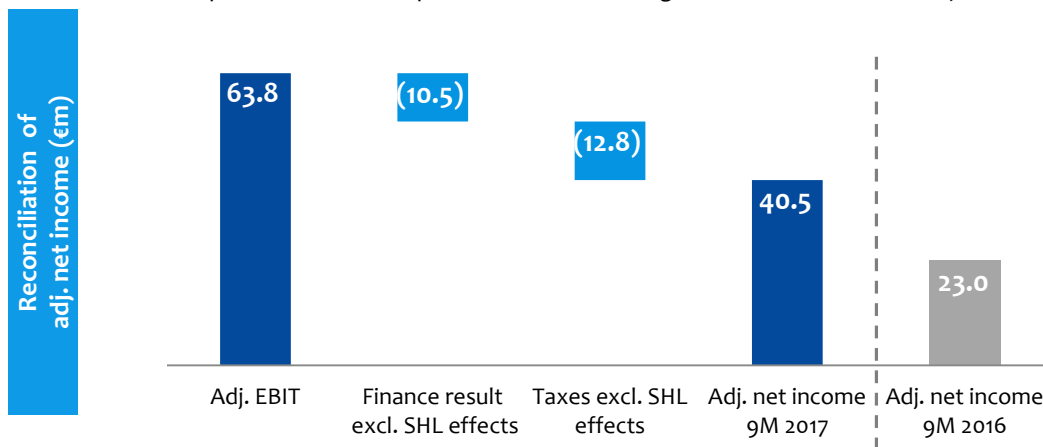
<sup>1</sup> Capex calculated as payments to acquire property, plant and equipment as well as intangible assets

# Appendix

# Reconciliation of adjusted earnings 9M 2017



## Key financials



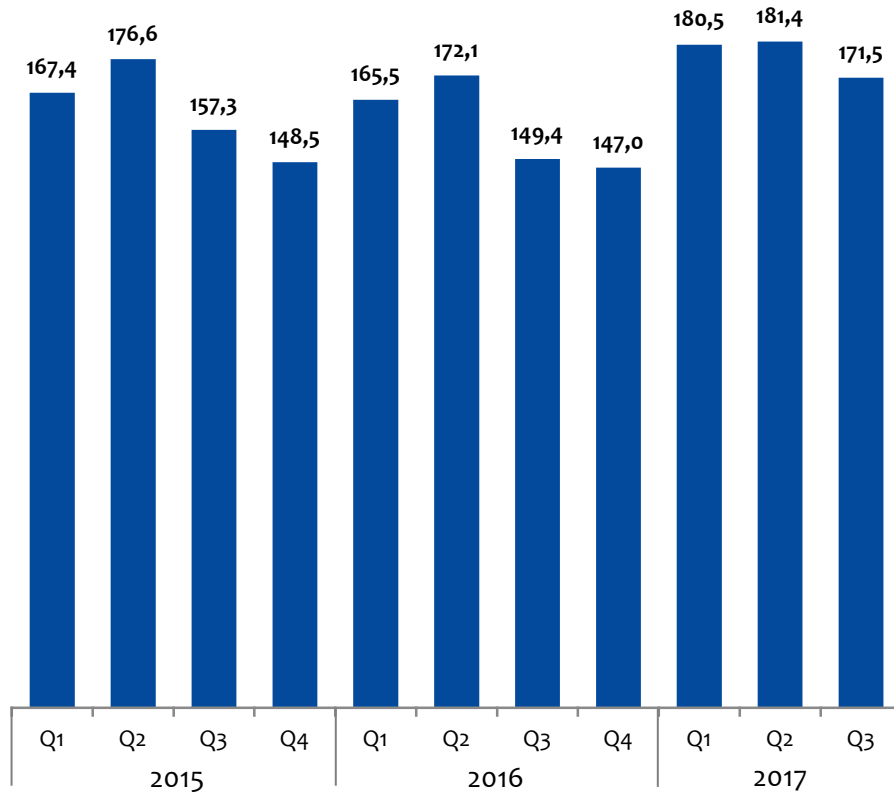
## Key highlights

- ✓ Adjustments to EBIT mainly from D&A of PPA
- ✓ Further adjustments from costs associated with the stock listing
- ✓ For comparability the adjusted net income excludes shareholder loan (SHL) effects on net finance result and income taxes
- ✓ Shareholder loan fully converted prior to stock listing on July 20th

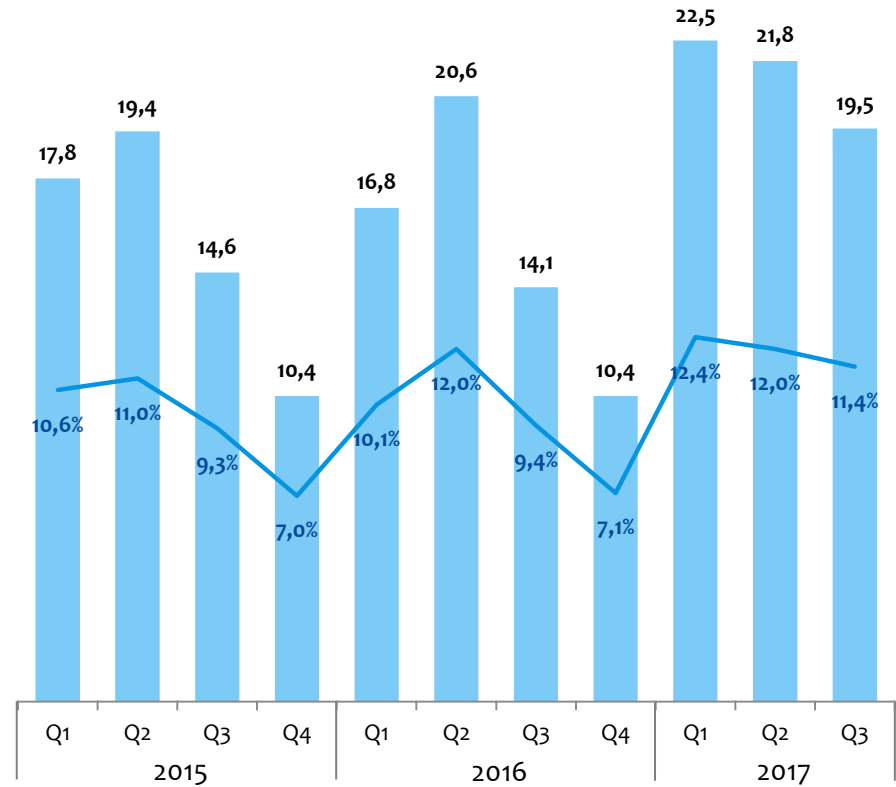
# Group's sales and adjusted EBIT by quarter



Sales (€m)



Adj. EBIT (€m)



Typical seasonality has not been as pronounced in Q3 2017 as in previous years



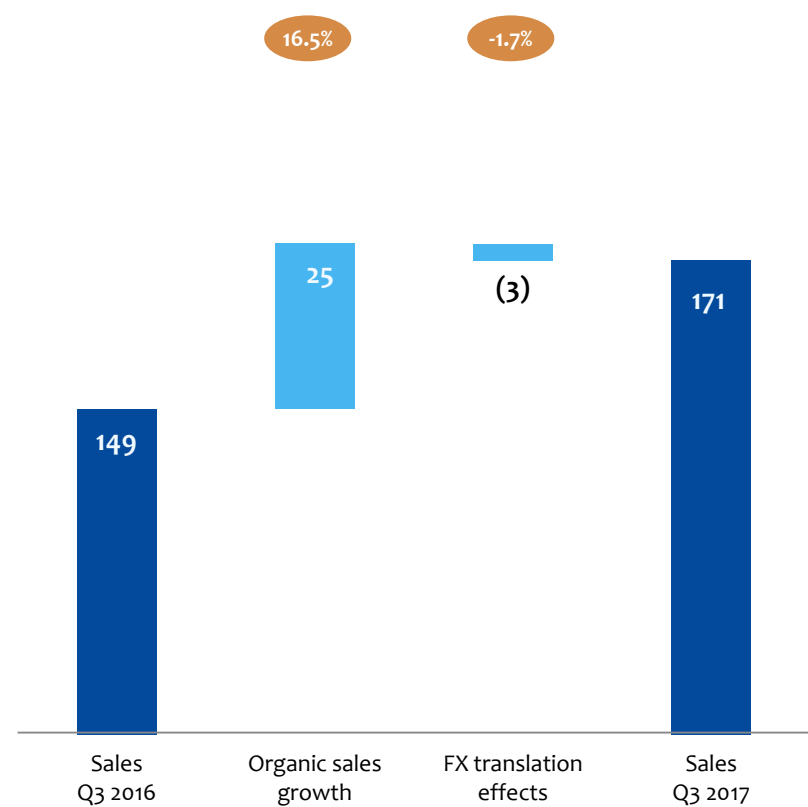
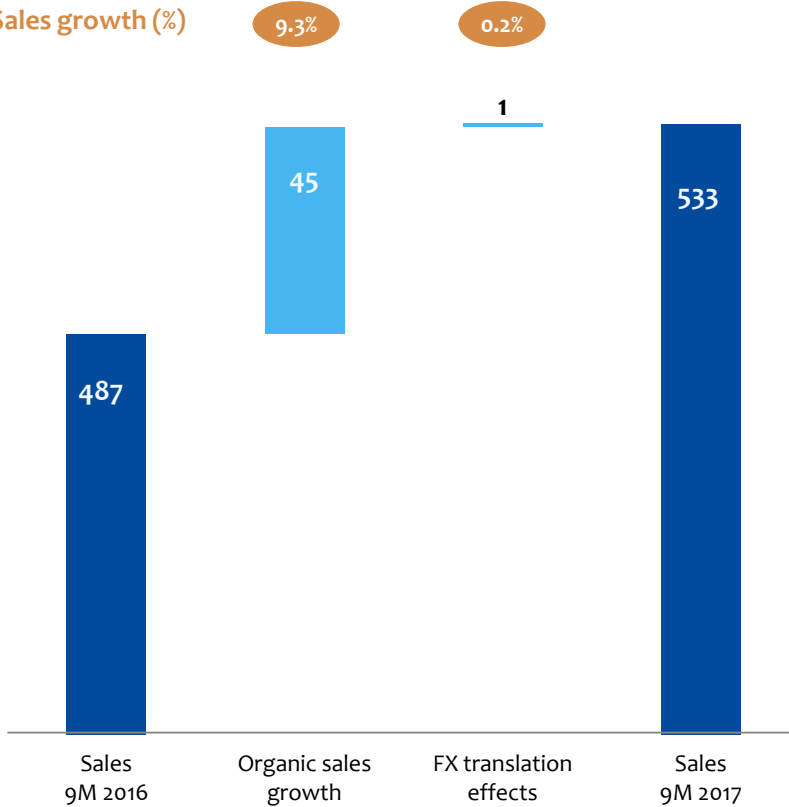
# Organic sales development



## Sales 9M (€m)

## Sales Q3 (€m)

Sales growth (%)



## Adjusted consolidated statement of income



### Profit & loss statement adjusted for exceptionals, PPA and shareholder loan effects

(€m)	FY2014A	FY2015A	FY2016A	9M 2016	9M 2017	%
<b>Sales</b>	<b>516.3</b>	<b>649.8</b>	<b>633.9</b>	<b>487.0</b>	<b>533.3</b>	<b>10%</b>
Cost of sales	(376.2)	(485.2)	(456.1)	(355.6)	(384.9)	8%
<b>Gross profit</b>	<b>140.1</b>	<b>164.6</b>	<b>177.9</b>	<b>131.4</b>	<b>148.4</b>	<b>13%</b>
Selling expenses adj. for PPA	(45.7)	(52.5)	(56.9)	(42.1)	(44.3)	5%
R&D expenses	(7.6)	(9.4)	(10.7)	(7.8)	(7.7)	-1%
Administrative expenses	(35.6)	(55.5)	(54.4)	(33.8)	(37.7)	12%
Other income / expenses	(1.1)	4.4	1.1	0.4	(0.2)	
Share of JV profit	2.7	1.4	1.4	1.0	1.6	69%
Exceptionals	6.0	9.1	3.6	2.4	3.7	53%
<b>Adj. EBIT</b>	<b>58.8</b>	<b>62.2</b>	<b>61.9</b>	<b>51.5</b>	<b>63.8</b>	<b>24%</b>
<i>% of sales</i>	11.4%	9.6%	9.8%	10.6%	12.0%	
Adj. Net finance result	(8.3)	(17.8)	(19.6)	(18.2)	(10.5)	-43%
<b>Adj. Profit before tax</b>	<b>50.5</b>	<b>44.4</b>	<b>42.3</b>	<b>33.3</b>	<b>53.3</b>	<b>60%</b>
Adj. Income taxes	(10.2)	(15.2)	(10.6)	(10.3)	(12.8)	25%
<b>Adj. Consolidated net income</b>	<b>40.4</b>	<b>29.2</b>	<b>31.7</b>	<b>23.0</b>	<b>40.5</b>	<b>76%</b>

## Consolidated statement of income



### Profit & loss statement

(€m)	FY2014A	FY2015A	FY2016A	9M 2016	9M 2017
<b>Sales revenues</b>	<b>516.3</b>	<b>649.8</b>	<b>633.9</b>	<b>487.0</b>	<b>533.3</b>
Cost of sales	(376.2)	(485.2)	(456.1)	(355.6)	(384.9)
<b>Gross profit</b>	<b>140.1</b>	<b>164.6</b>	<b>177.9</b>	<b>131.4</b>	<b>148.4</b>
Selling expenses	(1.2)	(81.0)	(82.1)	(61.0)	(63.2)
Research and development expenses	(7.6)	(9.4)	(10.7)	(7.8)	(7.7)
Administrative expenses	(35.6)	(55.5)	(54.4)	(33.8)	(37.7)
Other income / expenses	(1.1)	4.4	1.1	0.4	(0.2)
Share of profit of loss of equity method investments	2.7	1.4	1.4	1.0	1.6
<b>Operating profit (EBIT)</b>	<b>97.4</b>	<b>24.6</b>	<b>33.1</b>	<b>30.2</b>	<b>41.2</b>
Net financial result	(47.1)	(75.5)	(35.2)	(28.5)	(144.4)
<b>Profit before tax</b>	<b>50.2</b>	<b>(50.9)</b>	<b>(2.1)</b>	<b>1.7</b>	<b>(103.2)</b>
Income taxes	(21.9)	(1.2)	(13.1)	(9.6)	27.6
<b>Consolidated net income for the year</b>	<b>28.3</b>	<b>(52.1)</b>	<b>(15.2)</b>	<b>(7.9)</b>	<b>(75.6)</b>
Non-controlling interests	(0.0)	0.0	0.0	0.0	0.0
<b>Profit attributable to owners of the parent</b>	<b>28.3</b>	<b>(52.1)</b>	<b>(15.2)</b>	<b>(7.9)</b>	<b>(75.6)</b>

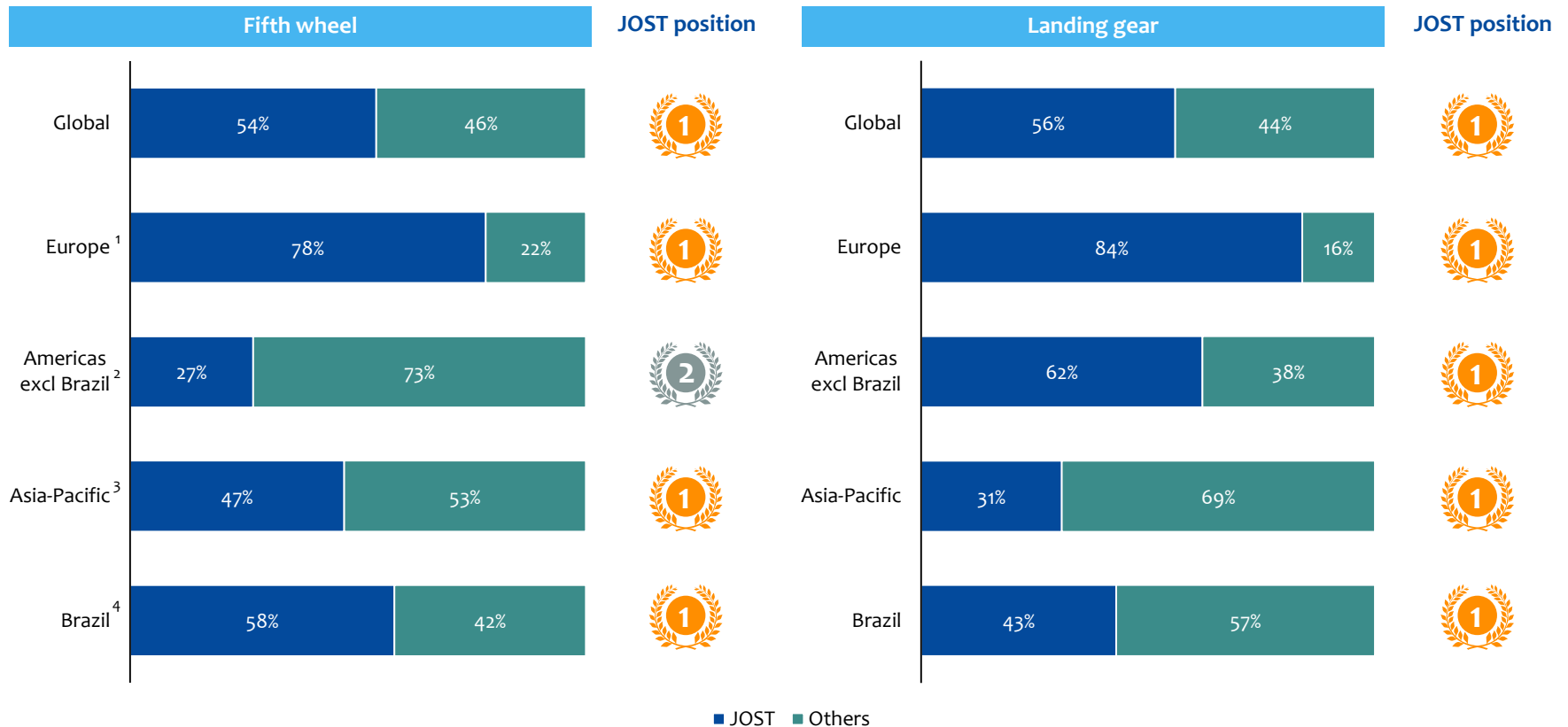
# Global leadership

JOST's leading market positions – focus on fifth wheel and landing gear



JOST has a leading market position in Vehicle Interface systems

Market shares by sales in OE business by geography



JOST is the global leader in fifth wheel and landing gear

<sup>1</sup> Includes the following countries: AUT, BEL, DEN, FIN, FRA, GER, ITA, NED, NOR, POR, ESP, SWE, CH, UK, CRO, SRB, BLR, BGR, CZE, EST, HUN, LAT, LTU, POL, ROM, SVK, SVN, TUR, UKR

<sup>2</sup> Includes the following countries: CAN, MEX, USA, COL, ECU, VEN, ARG

<sup>3</sup> Includes the following countries: IDN, MYS, THA, PHL, KOR, JAP, AUS, PAK, TWN, IND, CHN, DZA, EGY, MOR, TUN, SAU, UAE, other MEA

<sup>4</sup> Including Brazil JV

Source: Roland Berger 2017