

TRANSCRIPT / PRE-CLOSE CALL Q1 2026



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Q1 2026 Schaeffler AG Pre-Close Call

April 15, 2026
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Company Representative

Heiko Eber, Head of Investor Relations

Conference Call active Participants

Christoph Laskawi, *Deutsche Bank*

Horst Schneider, *Bank of America*

Vanessa Jeffriess, *Jefferies*

Ross MacDonald, *Citi*

Sanjay Bhagwani, *Citi*

Tobias Willems, *LBBW*

Heiko Eber

Thank you very much. Good morning, ladies and gentlemen. I'm very happy to welcome you to our today's pre-close call on the quarter 1 2026.

Now before we move to the content of today's call, I'm sure that, as usual, you have all taken notice of the well-known disclaimer. Please note that this release and all the information herein is still unaudited and that our next quiet period will start today after this call.

We are holding this call to remind you of relevant public information previously provided by Schaeffler or otherwise available in the market, which may be helpful in assessing the company's financial performance ahead of the Q1 2026 results on May 5th.

Looking at the agenda, as usual, I will guide you through the key messages and give some more clarity on our divisions. And as usual, you will have the opportunity to ask questions after our short presentation.

Schaeffler Group

	Q1 2025	Key aspects
Sales in EUR bn	5,924	Lower yoy, but with slightly positive FX-adjusted growth
EBIT margin ¹	4.7%	Slightly higher yoy, well within FY guidance range of 3.5% to 5.5%
Free Cash Flow ² in EUR mn	-155	Seasonally negative, lower yoy

¹ Before special items | ² Before cash in- and outflows for M&A activities

Apr 15, 2026 Q1 2026 Schaeffler AG Pre-Close Call

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So Slide number 3. Before we actually jump into the key aspects of Q1 2026, please let me upfront share some key messages around the Middle East conflict since I am very sure that you will ask anyhow. So, we installed a task force evaluating this very dynamic situation on a day-by-day basis.

Our footprint, nevertheless, in the Middle East is very limited to an office and a very small warehouse for our Vehicle Lifetime Solutions Division. As of now, energy supply for our operations is secured and short-term price fluctuations are largely mitigated throughout 2026 by price hedging.

Our supply chains remain stable and no disruptions have been reported at any of our plants so far. Nevertheless, due to the elevated volatility, we are closely monitoring the situation. Q1 was not materially impacted by the conflict and the call-offs from our customers overall have been stable. Any inflationary effects on energy, freight and material costs are monitored and, as in the past, will be addressed accordingly.

So now let's talk about Q1 2026. We expect sales in Q1 to be slightly lower year-over-year with a slight positive FX-adjusted growth. On the EBIT side, Q1 adjusted EBIT should come in slightly higher than Q1 2025, and with this well within our full year guidance range of 3.5% to 5.5%, driven by a steadily improving operational performance.

Regarding our Free Cash Flow, we anticipate a negative figure in Q1, lower than prior year and following the usual seasonality. However, also here, we are well on track to reach our full year Free Cash Flow guidance of €100 mn to €300 mn positive.

Divisional aspects Q1 2026

	E-Mobility	Powertrain & Chassis	Vehicle Lifetime Solutions	Bearings & Industrial Solutions
Q1 2025 Sales in EUR mn	1,174	2,302	783	1,627
Q1 2025 EBIT margin ¹	-22.9%	12.4%	15.7%	10.1%
<i>Market environment</i>	Market environment challenging in the US, moderate in China and improving in Europe	Overall soft market, in particular in Europe and China	Stable demand in all regions with a further growing and aging car parc	Flattish market, China with positive development in Industrial
<i>Sales</i>	Higher yoy, mid single-digit FX-adjusted growth driven by Europe and Asia/Pacific	Lower yoy with slightly negative FX-adjusted growth, mainly due to phase-out businesses	Higher yoy, slight FX-adjusted growth	Slightly lower yoy, but with positive FX-adjusted growth supported by Greater China
<i>EBIT margin¹</i>	Further improved vs. PY, below FY guidance range following the usual seasonality	At upper half of FY guidance range, below very strong PY	Very strong, on PY level	Slightly lower vs. PY due to high comps, at the upper end of FY guidance range

¹ Before special items

Apr 15, 2026 Q1 2026 Schaeffler AG Pre-Close Call

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Now on slide 4, you find the Q1 2025 sales and EBIT margin figures by divisions, including some comments to the respective market, sales and EBIT margin development in Q1 '26.

Let's start with E-Mobility. The market environment in Q1 was rather soft in the U.S. I would describe it as moderate in China, after the tax credits and the subsidies have been cut, whereas we could see an improving trend in Europe.

All-in-all, higher sales year-on-year, leading to a mid-single digit FX-adjusted growth versus prior year, mainly driven, as already indicated, by higher sales in Europe and Asia Pacific. When talking about profitability, we were able to further improve our EBIT year-over-year. Hence, the margin will be below our full year guidance range, but also this following the usual seasonality that you know from the previous years.

Looking at Powertrain & Chassis, we are still facing a soft market environment, in particular, in Europe and China. So, this you have heard over the previous quarters again and again. It leads to a moderate sales decline in Q1 year-over-year with slightly negative FX-adjusted sales growth. But please keep in mind, this development is still linked to our strategic decision to phase out certain businesses.

On the profitability side, we expect a strong Q1 with margin levels at the upper half of our full year guidance range of 10% to 12%. Still, the margin will be below the very

strong Q1 2025 of 12.4%, but this still is clearly a proof point of the successful execution of the structural measures in the last quarters and years.

Taking a look at Vehicle Lifetime Solutions, we saw a stable demand in all regions as the car parc is further growing and aging. Q1 sales are higher than prior year with slight FX adjusted growth year-over-year on very tough comps. The Q1 EBIT margin is expected to be again very strong on prior year level. So really another stellar quarter for our strong Vehicle Lifetime Solutions business.

Last but not least, on Bearings & Industrial Solutions, the market environment continues to be difficult, still lacking a material recovery of Industrial production. So, I'm not going to tell you anymore that we are waiting for a market recovery. For now, we accept the market the way it is.

Nevertheless, in China, we saw some strong positive momentum in several Industrial sectors, including raw materials, Railway, Power Transmission, or Industrial Automation. In addition, the already addressed positive development in Aerospace also continued. So, sales are expected to be slightly lower year-over-year, but with positive FX adjusted growth supported, as already mentioned, by Greater China.

The margin should be slightly lower than prior year due to the very high comps from last year. However, at the upper end of our full year Guidance range of 7% to 9%. So strong operational steering and successful execution of our structural measures continue to pay off in Bearings.

FY 2026 Guidance

	Schaeffler Group	E-Mobility	Powertrain & Chassis	Vehicle Lifetime Solutions	Bearings & Industrial Solutions
Sales in EUR bn	22.5 to 24.5	5.2 to 5.8	8.0 to 8.6	3.1 to 3.3	6.2 to 6.7
EBIT margin ¹	3.5% to 5.5%	-15.0% to -13.0%	10.0% to 12.0%	13.5% to 15.5%	7.0% to 9.0%
Free Cash Flow ² in EUR mn	100 to 300	Market assumptions <ul style="list-style-type: none"> LVP: Schaeffler expects global LVP decrease by -0.4% in 2026, based on the forecast by S&P Global Mobility³ Car Parc: Growth rate of Global LV Parc⁴ between 2.0% and 2.5% for 2026 compared to 2.4% in 2025. The average age will further increase in 2026 (2025: 11.5 years) Industrial Production: According to forecasts by S&P Global Market Intelligence, growth in global Industrial Production⁵ between 2.5% and 3.0% in 2026 (2025: 2.1%) 			

¹ Before special items | ² Before cash in- and outflows for M&A activities | ³ Includes content supplied by S&P Global Mobility © [IHS Markit Light Vehicle Production Forecast (Base), January 2026]. All rights reserved. | ⁴ Includes content supplied by S&P Global Mobility © [IHS Markit Vehicles in Operation (VIO) Forecast, November 2025]. All rights reserved. | ⁵ Includes content supplied by S&P Global Market Intelligence © [Comparative Industry Service Forecast, January 2026]. All rights reserved. Sectors considered: Mechanical Engineering (ISIC 28), Transport Equipment (ISIC 30), Electrical Equipment (ISIC 271)

Apr 15, 2026

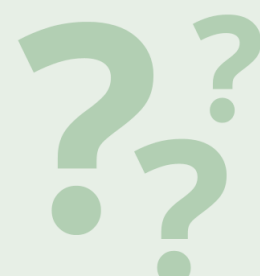
Q1 2026 Schaeffler AG Pre-Close Call

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On slide number 5, you see our well-known full year guidance, which we anticipate meeting across all key metrics. For sure, always with hindsight to the geopolitical tensions, in particular the already mentioned situation in the Middle East. So, before we jump into the Q&A session, just one short notice.

After the call, as usual, we will distribute our consensus sheet and would be very grateful for your contribution and your estimates, and even more grateful for your estimates until Thursday end of business. But now let me hand over back to the operator for our first question.

Q&A



Operator

Thank you very much, Mr. Eber. Ladies and gentlemen, we will now begin the question-and-answer session. Anyone who wishes to ask a question may press star and one on their telephone. You will hear a tone to confirm that you have entered the queue. If you wish to remove yourself from the question queue, you may press star and two.

Questioners on the phone are requested to disable the loudspeaker mode while asking a question. Anyone who has a question may press star and one at this time. And we have the first question coming from Christoph Laskawi from Deutsche Bank. Please go ahead, sir.

Q&A SESSION

Christoph Laskawi, Deutsche Bank

Hi, Heiko, good morning. Just two quick ones from me. The first one would be, again, it looks to be a decent start for you guys in Q1. So, we expect the usual seasonality with a strong Q1 and then the margin to fade a bit in the coming quarters.

And then did management in recent meetings or conferences comment in any way on changes of call-off patterns towards the end of the quarter in terms of volumes or programs, any changes there that have been highlighted? Thank you.

Heiko Eber

Thanks, Christoph. So, I guess we have learned our lessons and we don't want to continue the usual pattern of having this very cyclic profitability development over the quarters. There will be slight deviations quarter-over-quarter. We will see, of course, potentially impacts from whatever is happening around the world at the moment. But we are confident that these extreme peaks will not reiterate.

On the call-off patterns, I mean, for now, the call-offs from our customers remained on a comparable level as we have seen in the last two or three quarters. The general direction of our customers unfortunately also remains the same. So, the visibility that we get from our customers is reduced.

You have a very good and reasonable visibility on the next four to six weeks, which is important for the short-term steering of your plant loading. The mid and longer-term visibility remains reduced. So, customers reserve the right to also react quickly on what is happening. And we need to deal with it. But honestly speaking, I think the organization is getting better and better to deal with this uncertainty.

Christoph Laskawi, Deutsche Bank

Thank you.

Heiko Eber

Welcome.

Operator

The next question comes from Horst Schneider from Bank of America. Please go ahead.

Horst Schneider, BofA

Yes, good morning, Heiko. Just quickly, some questions. Number one, do you expect or should we assume any larger one-off items again for Q1? It's always a little bit of surprise box, either write-down, but also on the cash side. Was there any cash out included in the Q1 already for restructuring?

Number two, it's a follow-up basically on this call-off question from Christoph as well. What we see now, for example, in VLS what is the region for the strong margin? Is it more seasonal? Or is it now really a situation that basically people repair their car and they don't buy any more cars. So that is a trend that I could expect happens in the next few quarters when the unit sales come down, then usually VLS is doing strong.

And again, on the call of maybe more by segment and how we should think about that. So when we are running now into an environment where maybe the EVs get a boost because of the high oil price and the total cost of ownership of EV is a lot better. So that could mean that maybe EV has got a stronger performance versus the ICE business maybe suffers.

I always ask myself, then for Schaeffler, what does that mean? What is the better effect? I mean in E-Mobility, maybe you have got lower losses. But of course, PTC has got the strongest margin. So, what should we think about this trade-off between potentially better E-Mobility versus lower PTC? What is better for you? Or it doesn't matter because you are kind of powertrain agnostic by now?

Heiko Eber

Thank you very much, Horst. No, very good questions. Let's start with the first one, on the one-off items. You will rarely find any quarter with basically no one-offs. But in Q1, we didn't have similar significant one-offs as we have experienced over the last one or two years. So there has been on the EBIT side, no significant one-off in Q1.

On the cash flow side, of course, our restructuring activities, they continue. So, we have a constant cash outflow for restructuring. We have a constant cash outflow for the integration of Vitesco and basically making the synergies available. So that

continues, and you will have a, let's say, normalized level of cash outflows for those two effects.

On VLS, honestly speaking, we don't yet see a significant pickup on the total number of repair kits that have been ordered. So maybe too early to say that people are tending to repair the car instead of buying new cars. What we see is that the regional and the mix effect was favorable in Q1.

What we have seen is that we have a seasonalized adjustment of our price lines, which has led in the first quarter maybe to the one or the other customer that did hold back some of the orders until these negotiations are finalized. But overall, as we see the margin at the moment, it's just a very stable and at the end of the day, very profitable business for us.

The third question I like a lot because it's of course a little bit looking into the crystal ball. To be honest, we should not get distracted from news that we see in German newspapers. In Germany, the discussion around, oops, I've been to the gas station and I was shocked about the high gas prices and that's why I'm now going to buy an EV. This is a very, very local phenomena. So, I tell you since years to have an EV. So, of course, it helps. It is a kind of eye-opening moment for the one or the other car buyer.

Will it structurally change the volume expectation for this year globally? Honestly, I would be careful to already anticipate something like this. In general, you already described the situation for us very well. We are fairly agnostic. You will never have a one-to-one replacement. This is better than the other.

At the end, what we need, the best for us is if we have a decent development on E-Mobility, not skyrocketing because that also creates then again friction in ramping up projects. So a moderate growth in E-Mobility, steady improvement of the margin and still enjoying a reasonable high ICE business, that would be the ideal world for us.

Horst Schneider, BofA

Okay. And on E-Mobility, last one, you are still in negotiations with your OEM customers on reimbursements. I think there was; or was there anything major in Q1 that was already booked or what is the potential that this could basically beef up the margins then in the rest of the year?

Heiko Eber

No. So, in Q1, there was no big one-time compensation from the customer. I mean, negotiations are of course ongoing, especially, and that's not a surprise, with customers from North America. At the end, it's always the question, do you want to have a short-term compensation or do you want to have long-term business?

And to be honest, the truth will be somewhere in the middle. For some of the projects, you will get reimbursed. For some of the projects, we will be glad to accept, for example, hybrid business securing our long-term supply relationship with these customers.

Horst Schneider, BofA

Okay. Yeah. All right. That's great. Thank you.

Heiko Eber

Thank you.

Operator

The next question comes from Vanessa Jeffriess from Jefferies. Please go ahead.

Vanessa Jeffriess, Jefferies

Morning. I was just wondering if you could go into E-Mobility growth in a little bit more detail by region. Just get, you know, mid-single digit FX adjusted growth is actually a pretty good outcome given the environment. So maybe you could talk about exactly, I mean, if you could put numbers to the US and China, that would be helpful.

Heiko Eber

Yeah. Vanessa, for a breakdown by region, I need to ask you for your patience until we finally release the Q1 numbers. I mean, the overall trend what we have seen is that the ramp-ups that we addressed over the last quarterly calls on a regular base, they are starting to materialize. That's what we especially see in Europe. That's why we said in China, let's say, the market is moderate.

For us, the growth is doing okay because despite the fact that the market is somehow muted due to the run-out of some of the subsidies, we get our new projects into series production. And Americas, we are in a situation where we are basically shifting from an originally estimated ramp-up of battery electric vehicles towards now an accelerated ramp-up of plug-in hybrids and range extender models.

Vanessa Jeffriess, Jefferies

Okay. And then maybe if you could give us any update on your other activities in the first quarter?

Heiko Eber

Yes. I mean, let's call it new growth activities. We are not standing still. Also there, next week there is the Hanover Fair, one of the biggest trade fairs in Europe. And please accept that we will save the one or the other announcement for the trade fair next week. So, bear with us, come and see us in Hanover, and I promise we will have the one or the other good news to share on new growth.

But what I can say is that the business is doing what they are supposed to do. We are increasingly increasing our engagement with more and more customers. We are very successful in acquiring new partners. And we have to be to a certain extent selective on how many supply relationships you really want to have at that point in time, because it's not just counting the numbers of customers that you are serving, but it's about serving the customer right and building this long-term relationship.

Vanessa Jeffriess, Jefferies

Great. We look forward to next week then. Thank you.

Heiko Eber

You're welcome.

Operator

As a reminder, if you wish to register for a question, please press star and one on the telephone. We now have the question from Ross MacDonald from Citi. Please go ahead.

Ross MacDonald, Citi

Yes, hi there. I think most of my questions have been answered, but I still have two left. Thanks, Heiko.

First one on the E-Mobility business. Obviously, your slides are very helpful, but just as we think about where the margin may settle in Q1 and then how to model this sequentially through the rest of the year, is there any steer you can give us?

Obviously, you're outside the Guidance corridor in Q1, but would you envisage the E-Mobility margins in the Guidance corridor in Q2 and then sequentially improving through to the back half?

The next question, just to follow up on the other divisions. Obviously, that was a slight drag, I think €28 mn loss in Q1 last year. Could you maybe help us size the losses in that other division, I assume losses in that other division in Q1 '26?

And then maybe a final one just on restructuring on Horst's question. How should we think within this margin, because obviously the margin guide here is strong versus the consensus in Q1, how should we think about the P&L benefit that carries over this year from the restructuring you've done already? Is there a base level of P&L or margin uplift as it relates to the headcount reductions that we should think about as a base level year-over-year sort of improvement? Thanks.

Heiko Eber

Thank you, Ross. So on E-Mobility. I would say that the margin development last year was already a good indication on how this seasonality could look like. We have typically a very strong Q4, that's what you know from the last years, very much linked to the reimbursements that we receive in the fourth quarter.

On the overall full year guidance, so we are still confident that with everything we see, that the full year guidance is realistic. And again, if you just take 2025 as a kind of blueprint on how the improvement should show up over the year, I think that's a good indication.

On the others, yes, of course, you will see a small loss on the others division also in Q1. It is on a lower base than what we have seen last year. Still, we are talking about either business that is in a startup phase or business that is in a phase-out phase. So, let's say, mitigated losses, but this is not meant to be the big profit contributor for now.

And last but not least, on the restructuring effects. I mean, at the end of the day, what I mentioned at the beginning, this improvement year-over-year on the margin side, the stabilization that we especially see on our B&IS business over the last 12 to 15 months, this is of course heavily supported by the restructuring.

It's always difficult in a bridge to say, okay, which amount or which part of the improvement is coming from restructuring. But what we see is, we have a headcount that is steadily decreasing in line with our original projections.

On some of the divisions we see that and I guess Klaus Rosenfeld mentioned this in our last quarterly call or in the full year call, we are seeing that we even are ahead of our original schedule. So I guess restructuring well on track, integration well on track, and the positive effects from both will continue to contribute on our steady margin increase.

Ross MacDonald, Citi

Thanks, Heiko.

Heiko Eber

You're welcome.

Operator

The next question comes from Sanjay Bhagwani from Citi. Please go ahead.

Sanjay Bhagwani, Citi

Hi. Thank you for taking my question also. I've just got one question left. Maybe, Heiko, just a bigger picture on Q2. If my memory serves, last year Q2 was impacted by tariffs and some of the pass-through nuances and the timing. And that is why the margins had declined sequentially. So if this year the call-off volatility, let's say, remains where it is now, then would you expect the Q2 margins to be higher versus Q2 last year?

Heiko Eber

Thanks, Sanjay. So, in a pre-close call for Q1 to already make an indication on Q2 is of course not an easy one. But let's put it like this. Last year, you're right, we had a little bit of hiccup due to the tariff situation and all the implications on the supply chain. If this is not the case, then we expect a more stable Q2. And that would mean that we should see a continuous positive development on the margin side year-over-year also in the second quarter.

Sanjay Bhagwani, Citi

Thank you. That's very helpful.

Heiko Eber

You're welcome.

Operator

We have a follow-up question coming from Horst Schneider from Bank of America. Please go ahead.

Horst Schneider, BofA

Thank you. Just quickly, I was searching that yesterday. On Helsing, you signed the MoU in December, but there has not yet been a final contract, right? Or was there something in March maybe after full year numbers? No, not yet?

Heiko Eber

This is correct, Horst. But I mean, keep in mind, this is not so much depending on Helsing or us. This is very depending on the governmental side of things. So they need to get their act together and then the operational companies can continue to do the work.

Horst Schneider, BofA

So first Helsing needs to get the official contract and then you can sign the contracts with Helsing, right?

Heiko Eber

That would be the logical sequence

Horst Schneider, BofA

All right. Got it. Thank you.

Heiko Eber

You're welcome.

Operator

The next question comes from Tobias Willems from LBBW. Please go ahead.

Tobias Willems, LBBW

Yeah, good morning, Heiko. A quick question from my side. The market for e-cars remains tight this year and the margin in the e-business is expected to improve with regard to the full year guidance given from your management. Is an improvement in production capacity utilization to be expected here, irrespectively to the restructuring measures you did already take in place? Thank you.

Heiko Eber

Thanks, Tobias. No, I mean, at the end, number one, we see continuous growth in E-Mobility, which is good and which is needed. It helps us to better utilize our line

capacity. We have many of these growth opportunities in our own hands. We talked about the number of launches we have in front of us this year.

And of course, the smoother the launches will go, the better for the top line, but also the better for our bottom line. Since in a complex launch, if you can mitigate your ramp-up costs, that is helpful for the margin. There we are confident that we are steadily improving. So, the focus of the team of Thomas Stierle is very much on having these launches as smooth as possible. And the indications we get at the moment are positive.

And you also addressed already another important topic. I think we made it quite clear, that a significant part of the synergies from the merger between Schaeffler and Vitesco is also contributed or is contributing to E-Mobility. And there we are progressing according to plan. So at the end, it's a mix.

It will be better loading of the plants, it's smoother launches for the new projects, and it's efficiency gains on R&D, on overhead structures. So that's why all in all, on track for the improvement for this year.

Tobias Willems, LBBW

Okay. Thank you.

Heiko Eber

You're welcome.

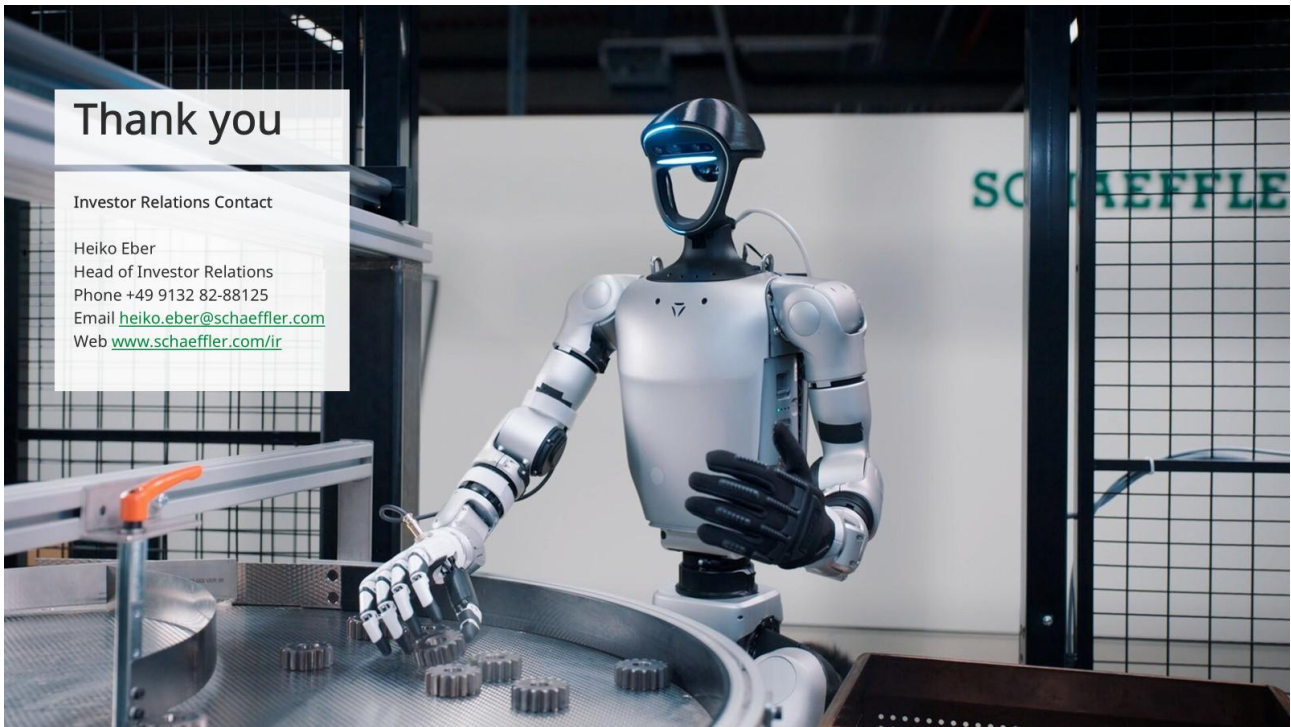
Operator

Ladies and gentlemen, that was the last question. I would now like to turn the conference back over to Heiko Eber for any closing remarks.

Heiko Eber

Thank you very much. So as usual, thanks for your interest, thanks for your time. A big thank you already now, for helping us with the consensus. And as usual, a big thank you to my team for the excellent preparation. So, have a nice rest of the day. Talk to you soon. Take good care. Bye-bye.

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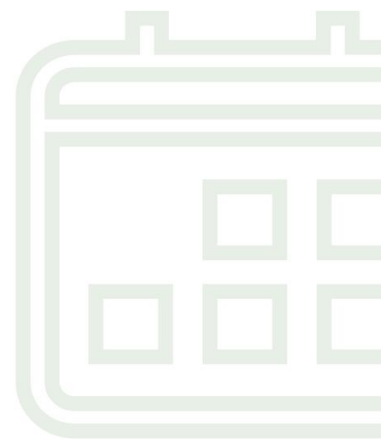
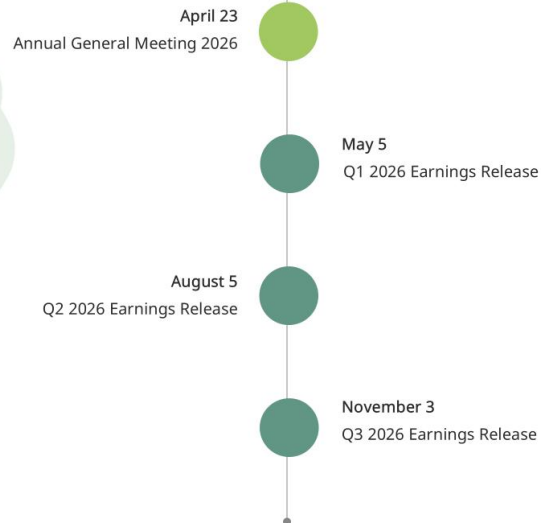


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Financial calendar 2026



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Apr 15, 2026

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Key figures 2025 by division

Group in EUR mn	Q1 25	Q2 25	Q3 25	Q4 25	FY 25
Sales	5,924	5,922	5,826	5,820	23,492
Sales growth ¹	-2.9%	-2.2%	+1.3%	+1.6%	-0.6%
EBIT ²	276	205	264	190	936
EBIT margin ²	4.7%	3.5%	4.5%	3.3%	4.0%

E-Mob in EUR mn	Q1 25	Q2 25	Q3 25	Q4 25	FY 25
Sales	1,174	1,245	1,286	1,310	5,015
Sales growth ¹	+9.6%	+9.7%	+4.7%	+4.7%	+7.0%
EBIT ²	-268	-192	-189	-155	-805
EBIT margin ²	-22.9%	-15.5%	-14.7%	-11.8%	-16.0%

PTC in EUR mn	Q1 25	Q2 25	Q3 25	Q4 25	FY 25
Sales	2,302	2,245	2,194	2,159	8,900
Sales growth ¹	-10.7%	-7.3%	-0.4%	-1.3%	-5.2%
EBIT ²	286	223	242	183	933
EBIT margin ²	12.4%	9.9%	11.0%	8.5%	10.5%

VLS in EUR mn	Q1 25	Q2 25	Q3 25	Q4 25	FY 25
Sales	783	780	740	735	3,038
Sales growth ¹	+10.7%	+2.3%	+2.3%	+5.1%	+5.0%
EBIT ²	123	112	113	101	450
EBIT margin ²	15.7%	14.4%	15.3%	13.8%	14.8%

B&IS in EUR mn	Q1 25	Q2 25	Q3 25	Q4 25	FY 25
Sales	1,627	1,614	1,570	1,557	6,368
Sales growth ¹	-2.1%	-0.5%	+2.2%	+3.3%	+0.7%
EBIT ²	164	93	125	93	475
EBIT margin ²	10.1%	5.8%	7.9%	6.0%	7.5%

Others in EUR mn	Q1 25	Q2 25	Q3 25	Q4 25	FY 25
Sales	38	37	37	60	171
Sales growth ¹	-55.3%	-67.7%	-43.4%	-27.6%	-50.7%
EBIT ²	-28	-31	-26	-32	-117
EBIT margin ²	-74.3%	-83.8%	-71.9%	-53.8%	-68.7%

¹ FX-adjusted | ² Before special items

Apr 15, 2026 Q1 2026 Schaeffler AG Pre-Close Call

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