



Life Energy Motion

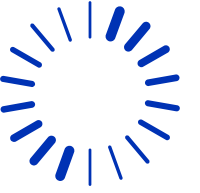
**Leading the world in
electrical measurement**





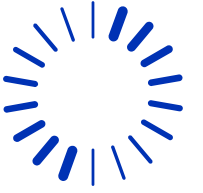
Leading the world in electrical measurement, LEM engineers the best solutions for energy and mobility, ensuring that our customers' systems are optimized, reliable and safe.

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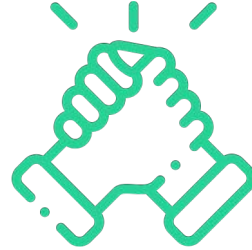
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- Life Energy Motion

LEM at a glance



1,500 people in over 15 countries

We transform technology potential into powerful answers



Best global talent

We develop and recruit talent at the forefront of mega trends such as

- renewable energy
- mobility
- automation
- digitization

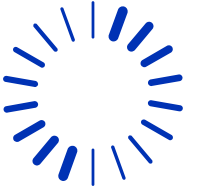


Innovative electrical solutions

We help our customers and society accelerate the transition to a sustainable future

LEM has a broad global footprint

Headquarters in Geneva, Switzerland, a strong presence in China



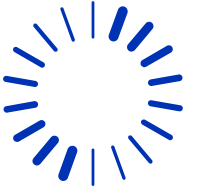
LEM Headquarters
• Switzerland

R&D centers
• Bulgaria
• China
• France
• Switzerland

Production plants
• Bulgaria
• China
• Japan
• Russia
• Switzerland

Sales

Broad global sales



Over 300 million Swiss Francs (CHF)

- 80% sales in Industry, 20% in Automotive applications
- Balanced geopolitical and economic exposure
- Close to customers on the ground in all key markets
- Strong focus on direct sales

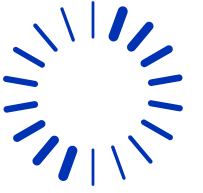
Europe
 $\frac{1}{3}$

China
 $\frac{1}{3}$



other key
markets
 $\frac{1}{3}$

Promising long-term sales potential

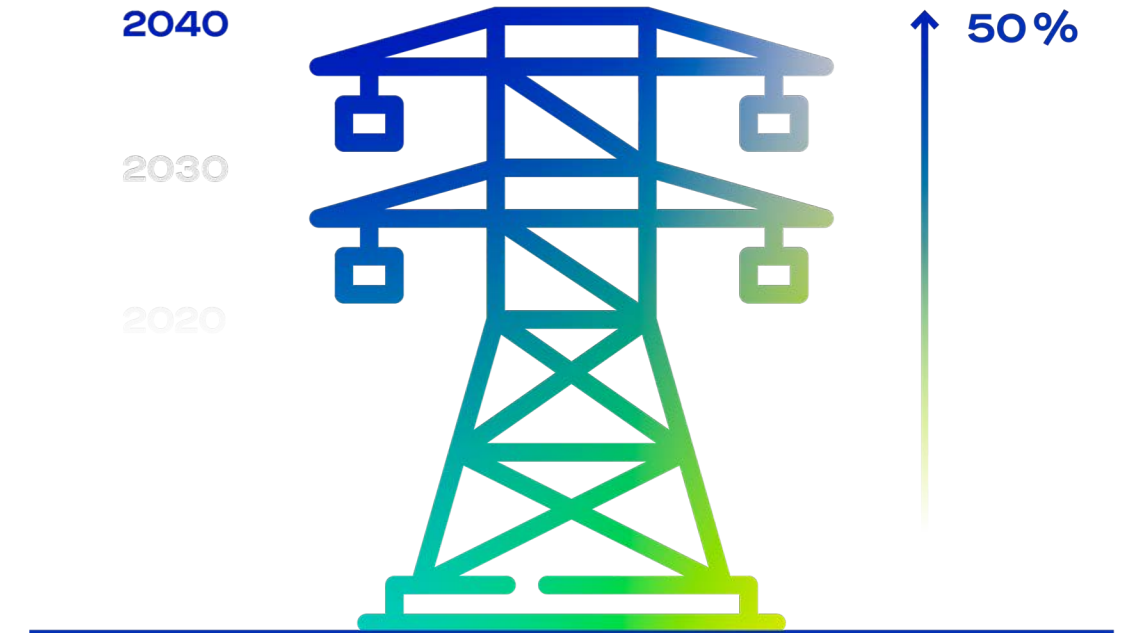


Rising global electricity production

Electricity production needs to increase by about 50% by 2040.

Mega trends drive demand for electric sensors:

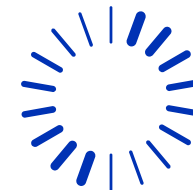
- Renewable energy
- Energy efficiency
- E-mobility for public and private transport
- Automation
- Smart grids



Source: International Energy Agency, World Energy Outlook 2017



Industry segment

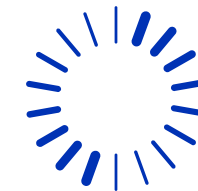


**“LEM enables me to actively shape
global trends such as electrification
and energy efficiency.
Creativity, teamwork and customer focus
are our key motivations.”**

**Mathieu Béguin,
Product Manager**



Industry key applications



Drives



LESR



Renewables



LDSR



Traction



LF-2010-S



High precision



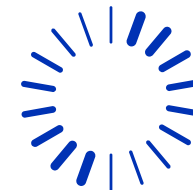
ITL900



A dynamic, low-angle shot of a car's side profile as it speeds through a tunnel. The walls and floor of the tunnel are blurred into streaks of light and color, creating a sense of rapid motion. The car's side mirror and door handle are visible in sharp detail. In the top right corner, there is a small, stylized circular logo consisting of many short, radiating lines.

Automotive segment

LEM

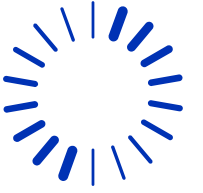


“LEM offers great opportunities to bring together human qualities and technical strengths with continuous improvement and innovation, combined with a supportive environment”

**Caroline Ravello,
Supply Chain Leader**



Automotive key applications



Battery management system



HBCT

CAB 1500



Motor control



HAH3DR-S07_SP2

HC16



Charging system



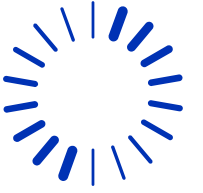
GO-SMS

HAM



Automotive in the future

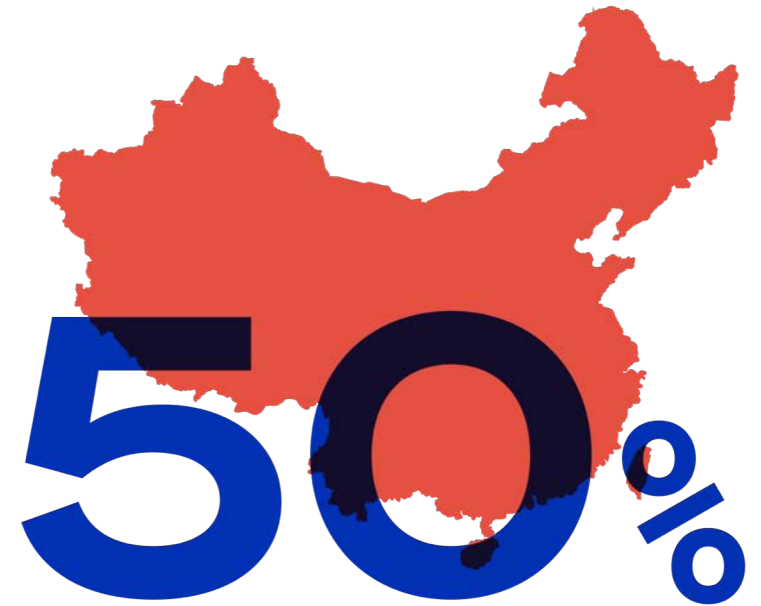
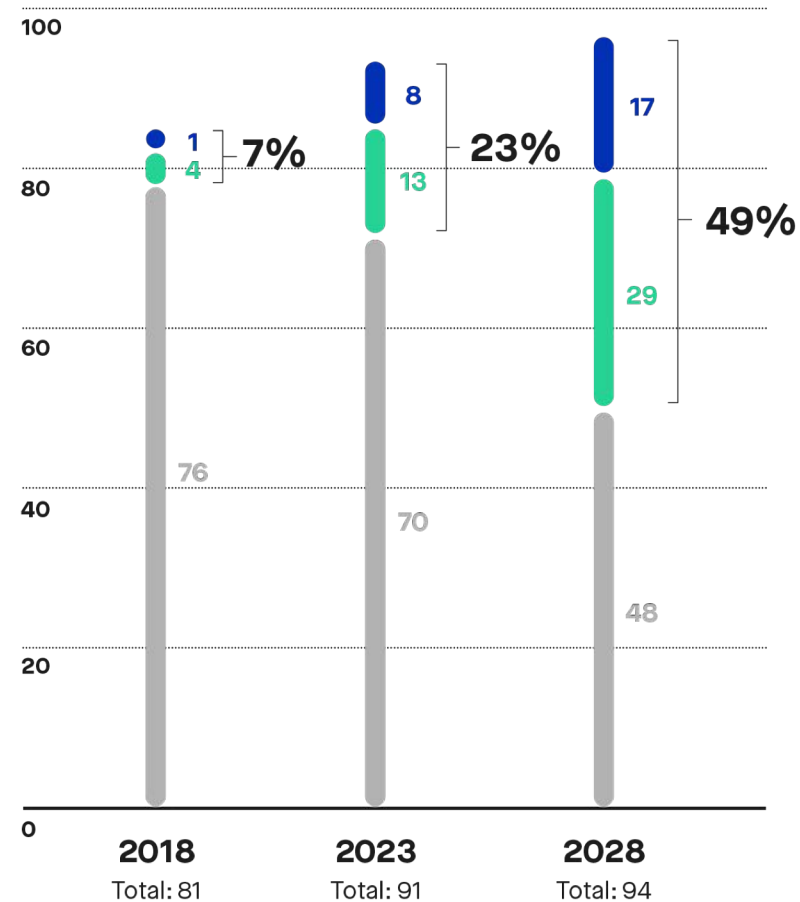
49% of new car sales will be hybrid or electric by 2028



New car sales – propulsion share units in millions

- Electric vehicles
- Hybrid vehicles
- Internal combustion engines

Source: IHS Markit, 2017

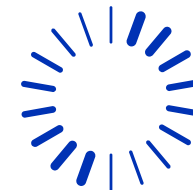


“China will play a major role in the electrification of the automotive market, representing 50 % of the annual EV/PHEV car production by 2028.”

Source: Bloomberg NEF, 2019



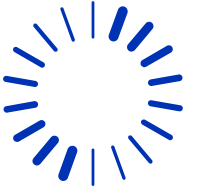
Investing in the future



“Far from being a mature market, electrical sensing products are undergoing significant mutations driven by new applications and technologies.”

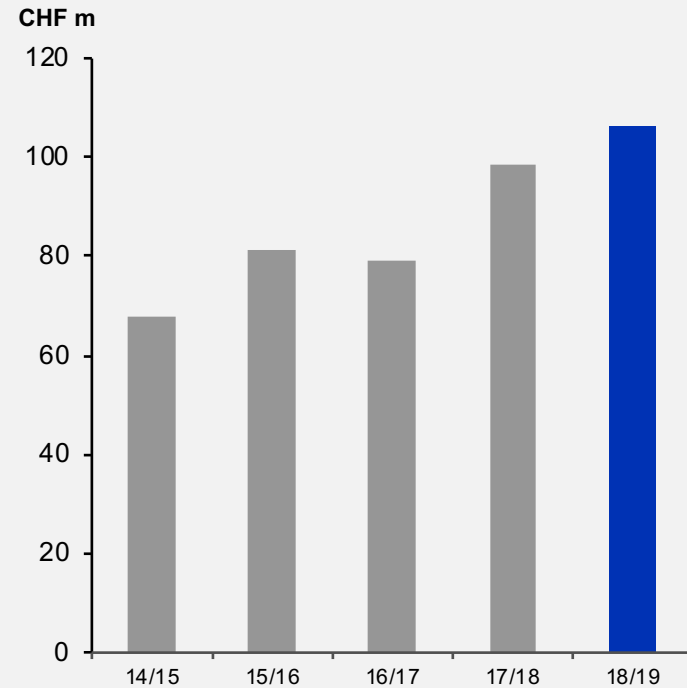
Frank Rehfeld, CEO

China is the biggest strategic opportunity



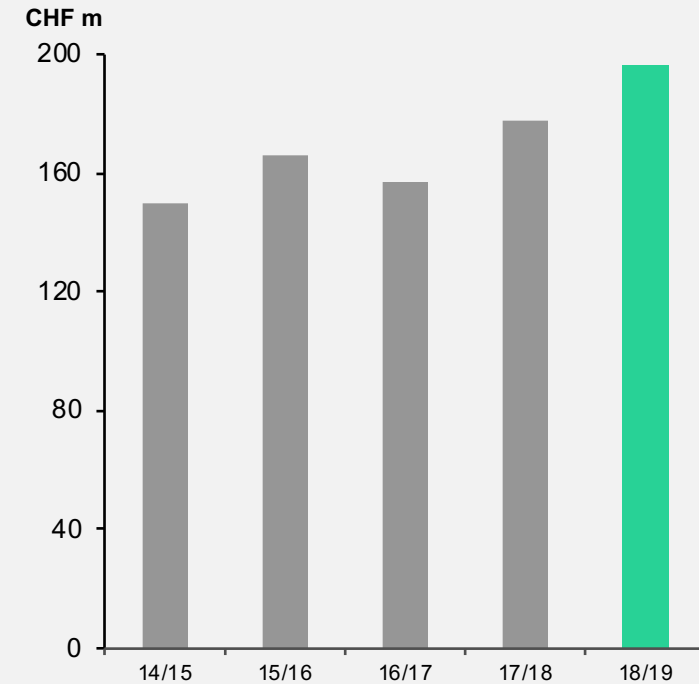
Sales

Industry market share of over **50%**
Key market with **33.1%** of total global sales

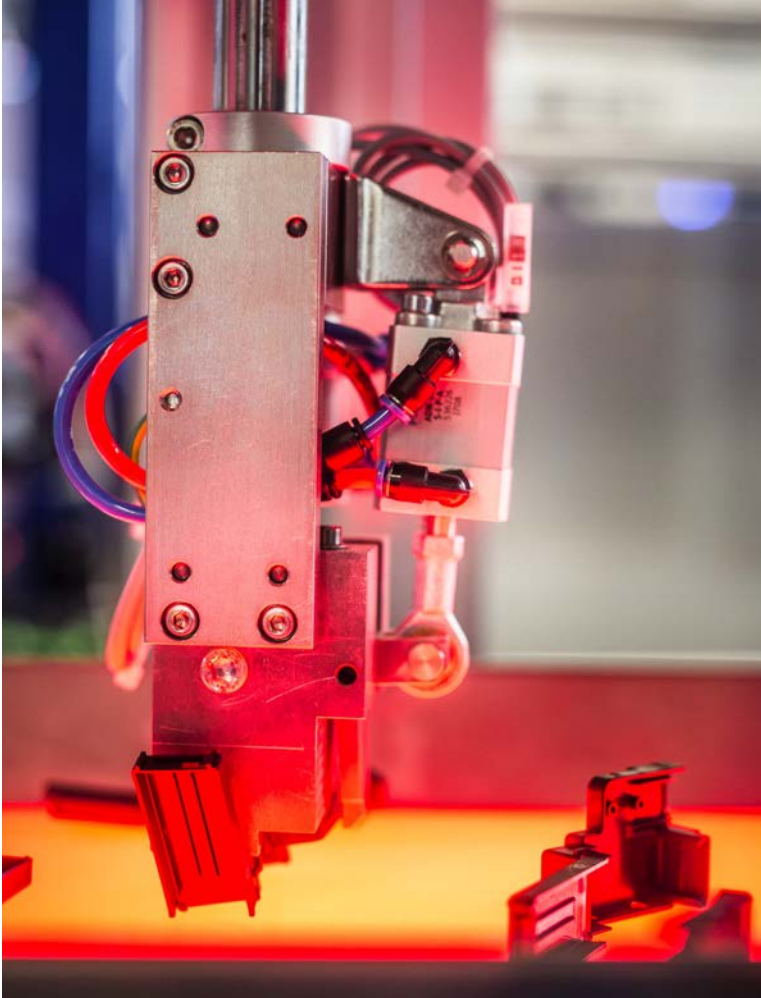
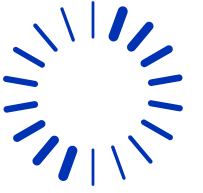


Production

China is the largest manufacturing site: **61%** of total production (**59%** in financial year 2017/18)
“Made by LEM” quality



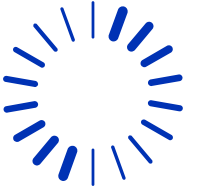
8–10% of sales invested in R&D



- Leveraging new technologies: smart sensors
- Capturing new opportunities in integrated current sensing
- Developing innovation at scale
- Collaborating closely with our customers and local universities
- Developing capabilities

Accelerating the organization

Becoming more agile to seize growth opportunities

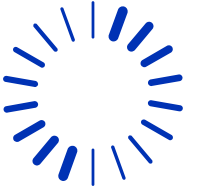


- Increasing speed to market
- Pushing innovation
- Developing talent and capabilities
- Empowering decision-making
- Encouraging entrepreneurship

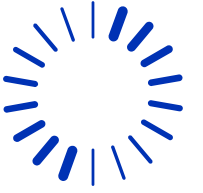


Our talent

Expertise, responsibility, teamwork



Developing and recruiting the best talent



Human-sized company with a global footprint

- Collaborative culture
- Mobility and career evolution
- Healthy work/life balance

Qualities of LEM people

- Technical excellence and leadership
- Creative and innovative thinking
- Ambition and accountability

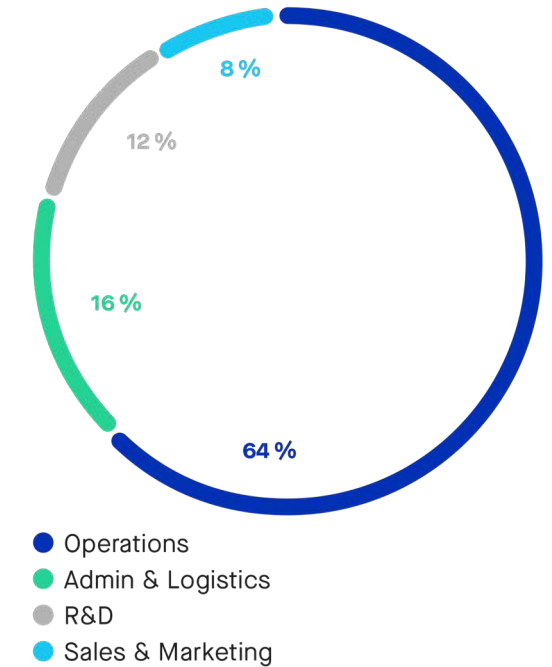
Work climate/team

Employee rating (2019)

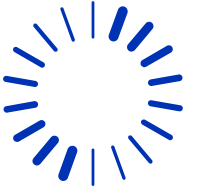


Workforce by activity

1,477 total employees (2019)



Our values

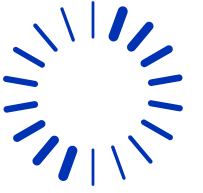


Together we...

- **are customer driven**
- **operate with integrity**
- **value teamwork**
- **commit to our goals**
- **strive for excellence**
- **lead innovation**

This is the spirit and intent of everything we do.

A long-term perspective



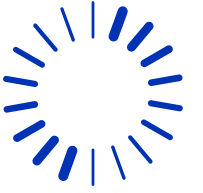
We believe that sustainable and ethical practices create long-term value for all stakeholders and assure the longevity of businesses.





**At LEM we help our customers
and society accelerate the transition to
a sustainable future.**

Helping the world stay connected reliably

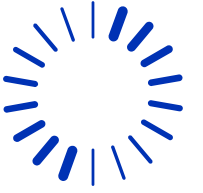


life

Our online, highly connected lives depend on steady streams of safe, uninterrupted electric flow.

Our products help

- Provide continuous power supply
- Control energy consumption
- Promote renewable energy

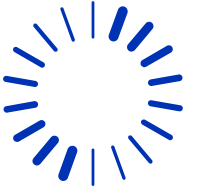


energy

**Smart grids, microturbines,
wind and solar power.**

We are at the forefront of engineering

- Highly accurate, safe new sensors
- Performance sensors for low-power, high-volume applications
- A range of compact semiconductor-based sensors



motion

Trains, tram, buses, conventional cars, green cars and elevators.

- Strong product portfolio in battery management, motor control, and charging systems
- Combining hardware and software with added functionalities and value for our customers



Thank you

