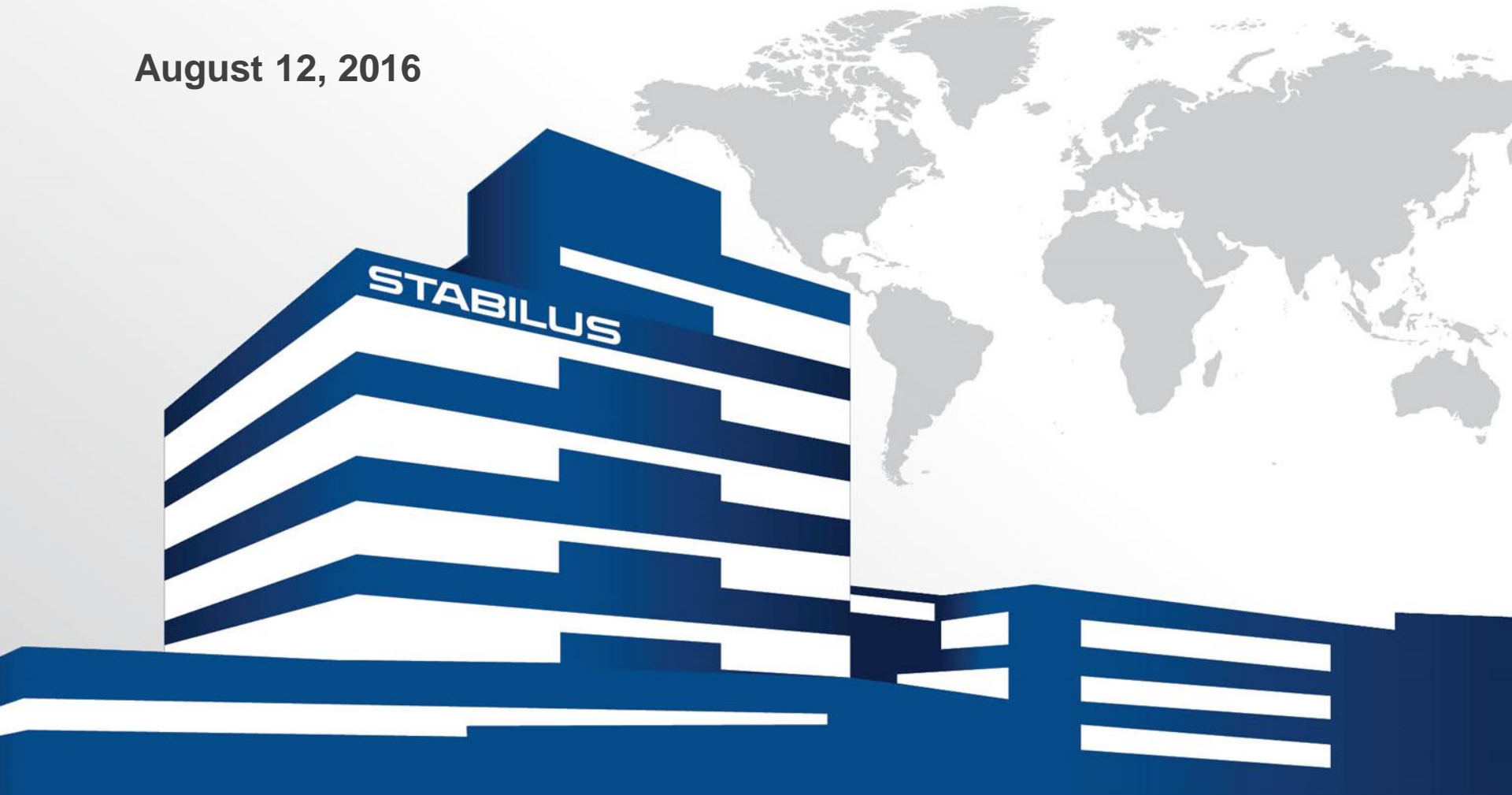


Third quarter results FY2016

August 12, 2016



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Agenda

1. Financial highlights
2. Business by region
3. Business by customer market
4. Outlook
5. Appendix

Third quarter results FY2016

1. Financial highlights

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5.

Highlights Q3 FY2016

Fiscal year-end September

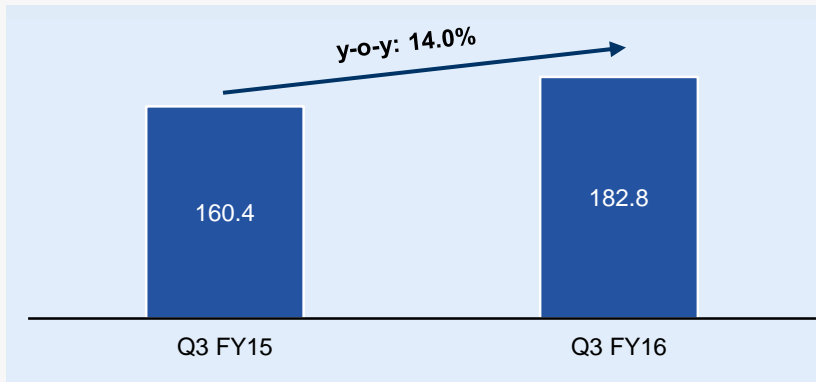
Revenue	<ul style="list-style-type: none">• Revenue up by 14.0% to €182.8mm (+€22.4mm vs. Q3 FY15)• Growth in all regions with NAFTA (+14.8%), Europe (+14.2%) as well as Asia / Pacific and RoW (+10.4%)• Growth in Powerise (+44.8%), Capital Goods (+5.1%) and Gas Spring (+7.3%); Swivel Chair (-9.2%)
Adj. EBITDA	<ul style="list-style-type: none">• Adj. EBITDA up by 14.9% to €31.6mm (+€4.1mm vs. Q3 FY15)• Adj. EBITDA margin at 17.3% (vs. Q3 FY15 margin of 17.1%)
Adj. EBIT	<ul style="list-style-type: none">• Adj. EBIT up by 18.7% to €23.5mm (+€3.7mm vs. Q3 FY15)• Adj. EBIT margin at 12.9% (vs. Q3 FY15 margin of 12.3%)
Net debt	<ul style="list-style-type: none">• Net financial debt¹ at €508.5mm; pro-forma² at €393.5mm• Net financial debt / adj. EBITDA LTM at 4.2x, pro-forma² at approx. 2.6x (vs. 2.1x as per end FY2015)
Significant events and transactions	<ul style="list-style-type: none">• Acquisition of ACE, Hahn Gasfedern and Fabreeka/Tech Products successfully completed on June 30, 2016• The acquisition was financed by a new €455mm term loan facility (replacing the existing €265mm term loan facility) and a €115mm equity bridge facility
Subsequent events	<ul style="list-style-type: none">• Capital increase successfully completed on July 6, 2016; issue of 3,976,744 new bearer shares• Gross proceeds of €159.1mm were used for partial refinancing of the acquisition of SKF Group entities, i.e. on July 13, 2016, the €115mm equity bridge facility was fully repaid

Note: ¹ Net financial debt = principal amount of senior facilities less cash: €455.0mm + €115mm - €61.5mm = €508.5mm.

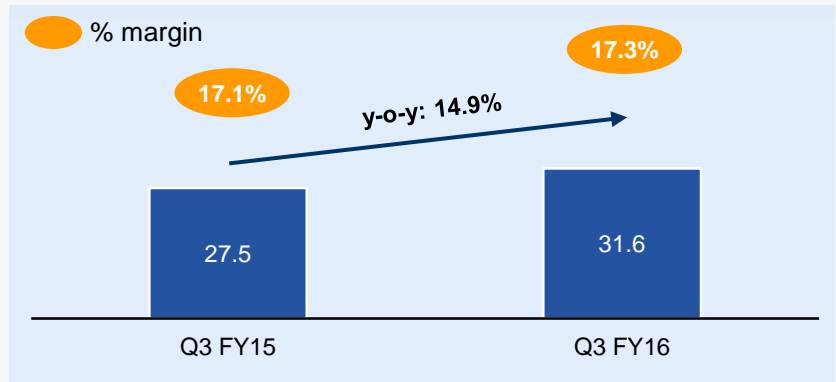
² Pro-forma, i.e. considering capital increase and refinancing in July 2016 as well as earnings (EBITDA) of acquired companies. Adj. EBITDA LTM = €122.2mm + €27mm.

Stabilus shows strong operating performance in Q3 FY2016 (y-o-y)

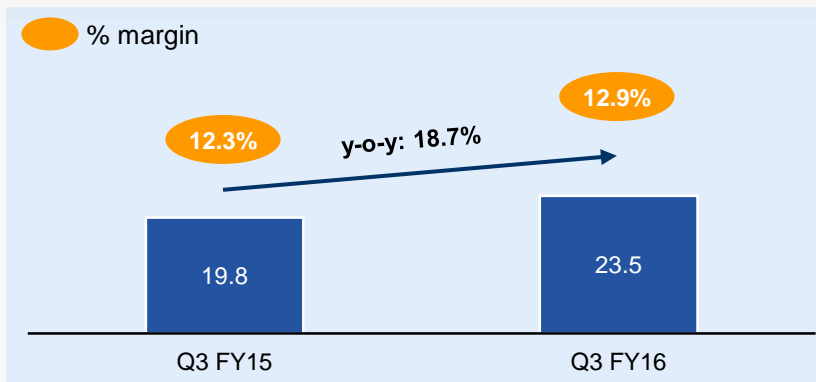
Revenue (€mm)



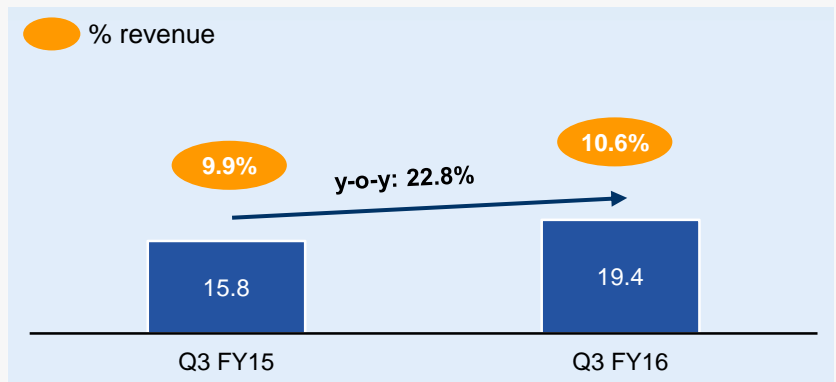
Adj. EBITDA¹ (€mm)



Adj. EBIT¹ (€mm)



FCF² (Adj. EBITDA-capex) (€mm)



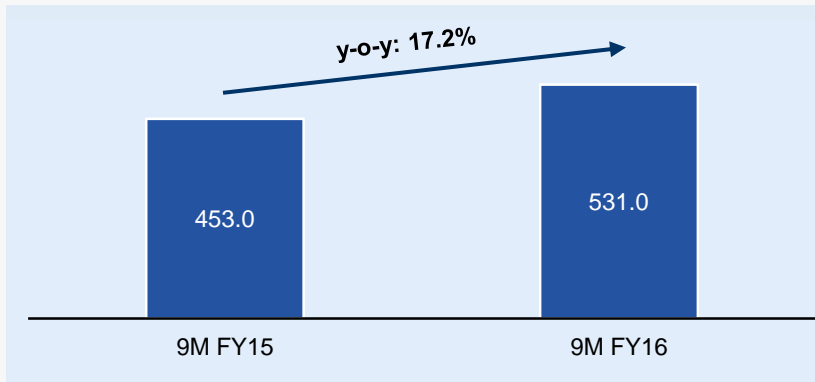
Note: Stabilus fiscal year-end is September.

¹ Adjusted EBIT / EBITDA represents EBIT / EBITDA, as adjusted by management primarily in relation to severance, consulting, restructuring, one-time legal disputes and other non-recurring costs, as well as interest on pension charges and – in case of adj. EBIT – depreciation and amortization of PPA.

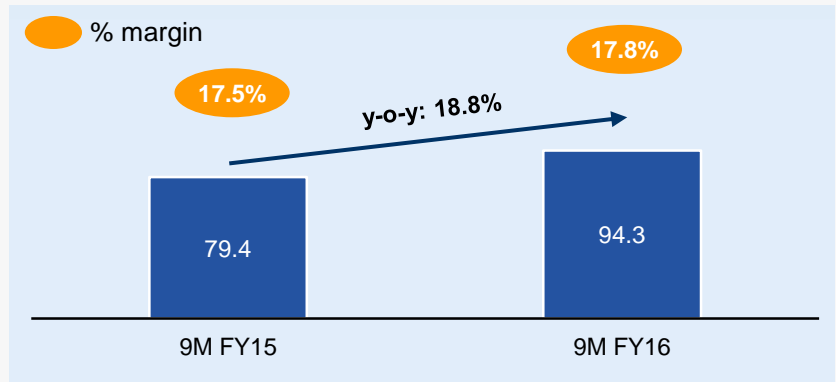
² Simplified definition of FCF differs from more detailed presentation in the quarterly report and in the appendix of this presentation.

Stabilus shows strong operating performance in 9M FY2016 (y-o-y)

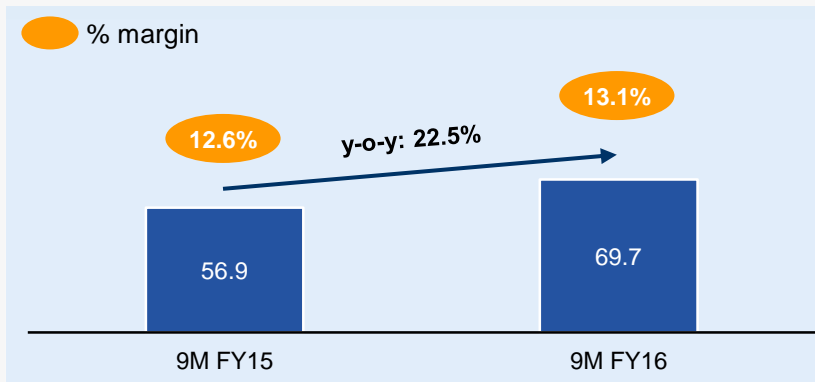
Revenue (€mm)



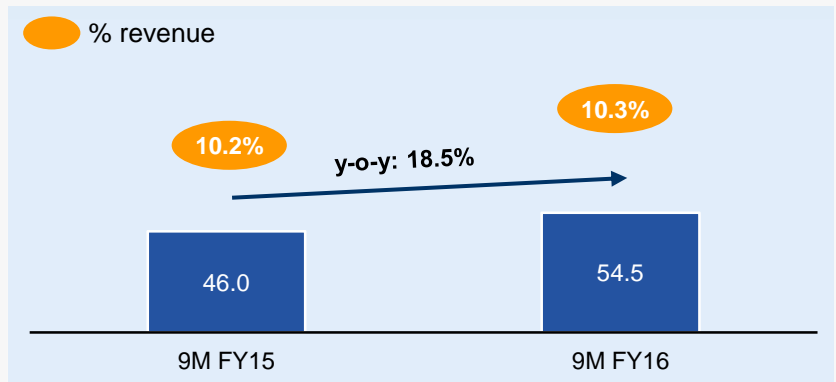
Adj. EBITDA¹ (€mm)



Adj. EBIT¹ (€mm)



FCF² (Adj. EBITDA-capex) (€mm)



Note: Stabilus fiscal year-end is September.

¹ Adjusted EBIT / EBITDA represents EBIT / EBITDA, as adjusted by management primarily in relation to severance, consulting, restructuring, one-time legal disputes and other non-recurring costs, as well as interest on pension charges and – in case of adj. EBIT – depreciation and amortization of PPA.

² Simplified definition of FCF differs from more detailed presentation in the quarterly report and in the appendix of this presentation.

Third quarter results FY2016

1.

2. Business by region

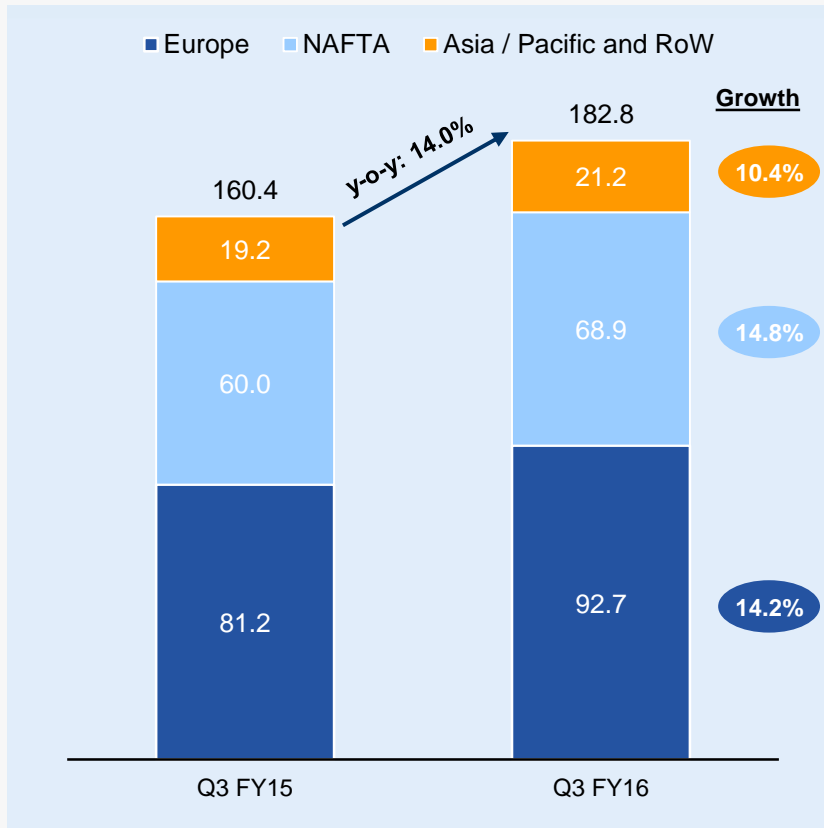
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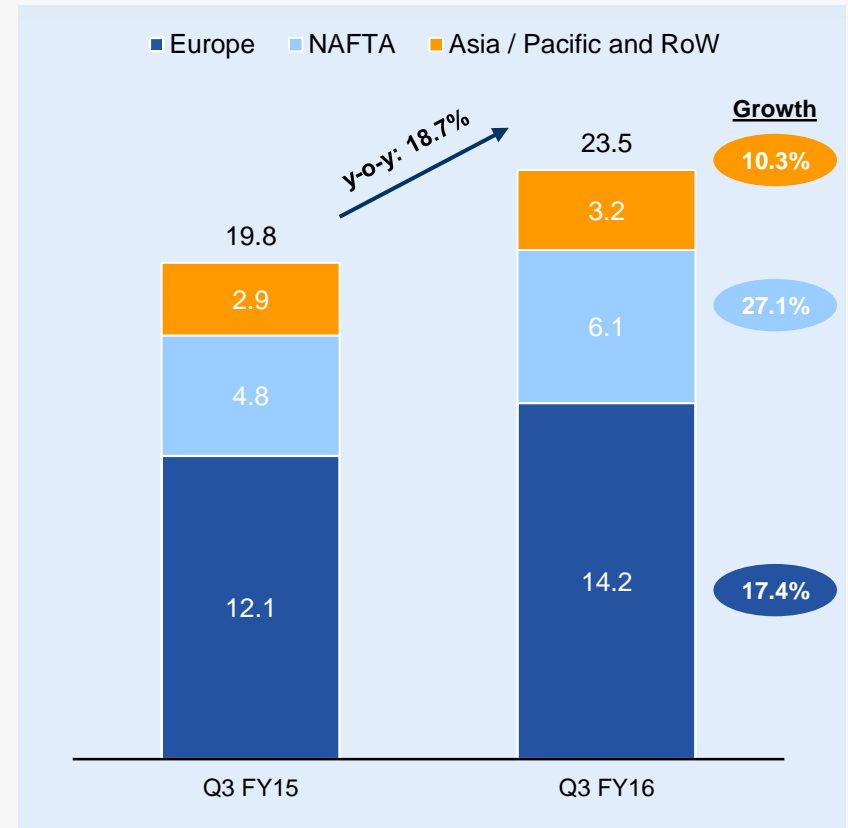
5.

Q3 FY2016 revenue and adj. EBIT growth – by region (y-o-y)

Revenue by region¹ (€mm)



Adj. EBIT^{1,2} by region (€mm)



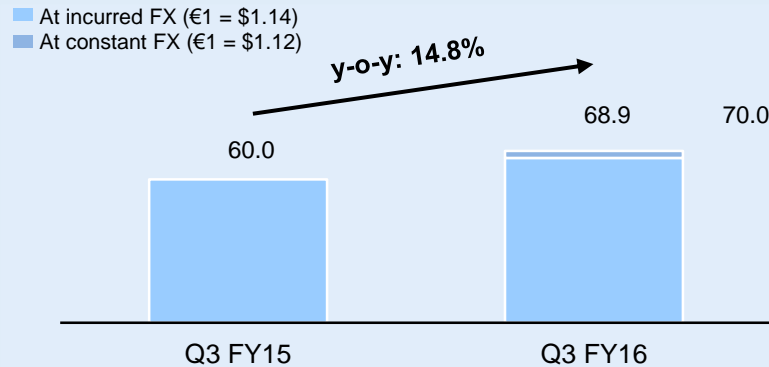
Note: Stabilus fiscal year-end is September. Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

¹ Billed-from view, without intersegment revenue.

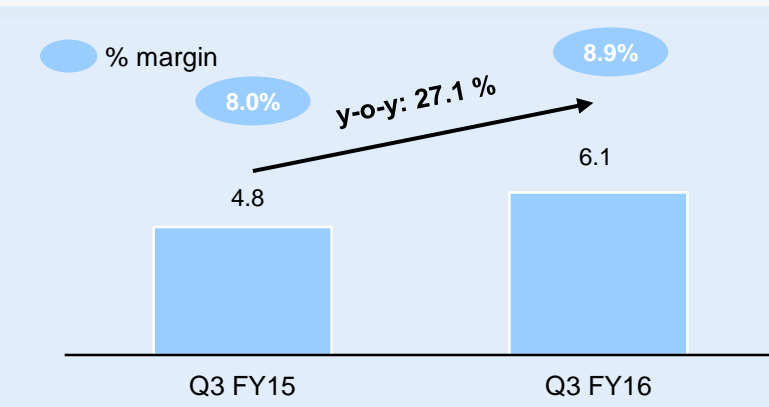
² Adjusted EBIT represents EBIT, as adjusted by management primarily in relation to severance, consulting, restructuring, one-time legal disputes and other non-recurring costs, as well as interest on pension charges and the depreciation and amortization of Group's assets to fair value resulting from April 2010 purchase price allocation (PPA).

NAFTA – Q3 FY2016 revenue and adj. EBIT growth (y-o-y)

Revenue¹ (€mm)



Adj. EBIT (€mm)



Key highlights

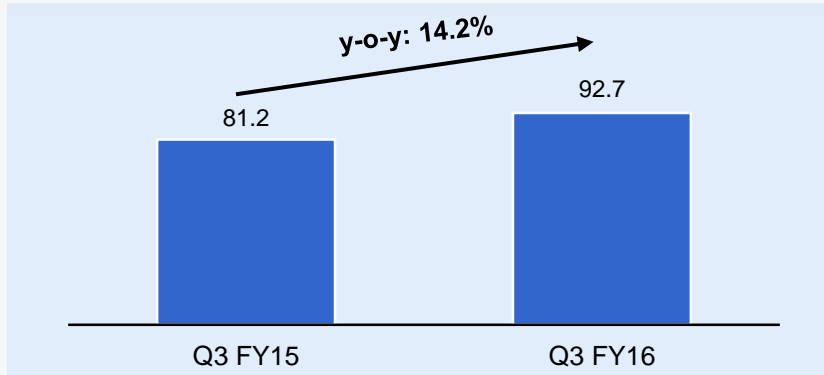
- NAFTA car production in Q3 FY16 at 4.7mm units, i.e. +2.8% vs. previous year quarter
- NAFTA Q3 FY16 revenue increased by 14.8% to €68.9mm (37.7% of group revenue vs. 37.4% in Q3 FY15)
- Revenue in US\$ terms improved by 16.6% to \$77.8mm in Q3 FY16 vs. \$66.7mm in Q3 FY15
- NAFTA's Powerise revenue increased by 36.2% to €28.2mm in Q3 FY16 (Q3 FY15: €20.7mm)
- Strong US auto economy combined with good SUV sales provide a stable base for future growth

Note: Stabilus fiscal year-end is September.

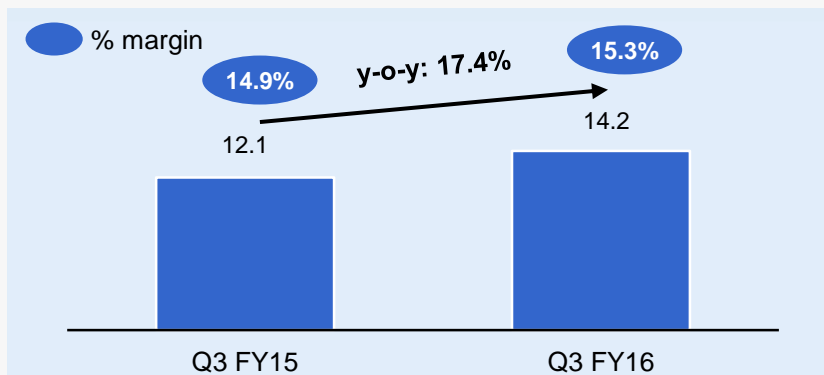
¹ External revenue only.

Europe – Q3 FY2016 revenue and adj. EBIT growth (y-o-y)

Revenue¹ (€mm)



Adj. EBIT (€mm)



Key highlights

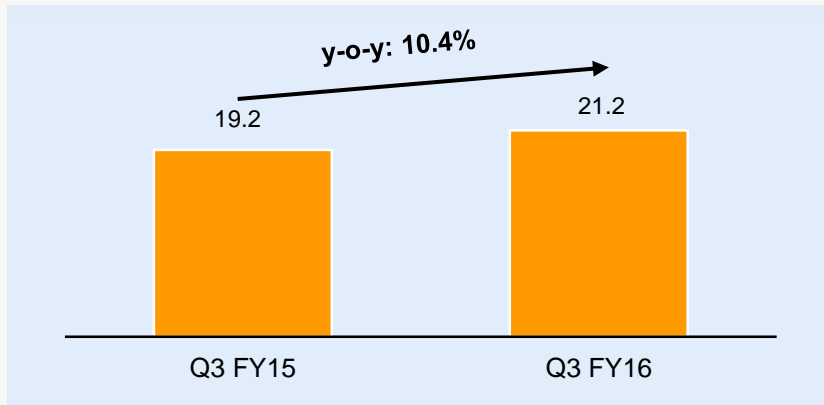
- Car production in Q3 FY16 at 5.9mm units, i.e. +7.2% vs. previous year quarter
- Europe's Gas Spring revenue increased by 8.4% to €37.5mm in Q3 FY16, supported by increased Federbein sales
- European Powerise revenue increased by 57.1% to €22.0mm in Q3 FY16 following various launches since Q3 FY15 as well as further Powerise share increase in existing platforms e.g. Daimler GLC Coupe, Audi Q5, Ford Galaxy, VW Passat CC, VW Phideon, BMW X1, Opel Astra

Note: Stabilus fiscal year-end is September.

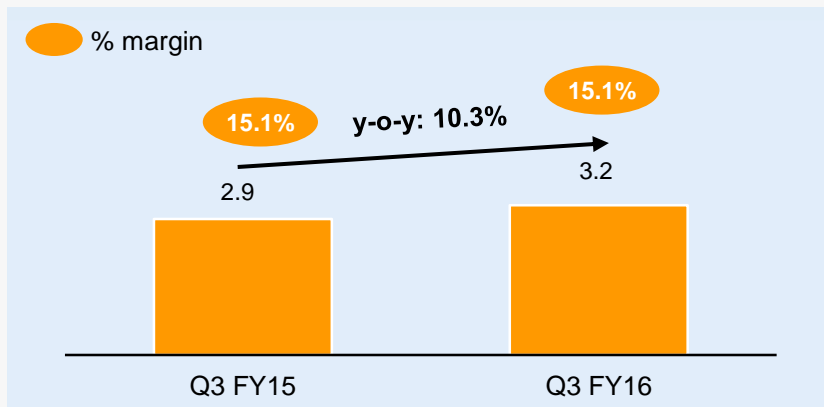
¹ External revenue only.

Asia / Pacific and RoW – Q3 FY2016 revenue and adj. EBIT growth (y-o-y)

Revenue¹ (€mm)



Adj. EBIT (€mm)



Key highlights

- Asia/Pacific and RoW car production in Q3 FY16 at 12.3mm units, i.e. +0.8% vs. previous year quarter (China: +5.1%, Japan/Korea: -4.2%, South America: -13.6%)
- 10.4% or €2.0mm year-over-year revenue growth in Q3 FY16 is mainly driven by automotive business
- China's Q3 FY16 revenue at €13.5mm (+19.5% vs. Q3 FY15)
- Chinese market shows increasing trend to SUVs and "boxy cars" which is very supportive for our revenue outlook in this market

Note: Stabilus fiscal year-end is September.

¹ External revenue only.

Third quarter results FY2016

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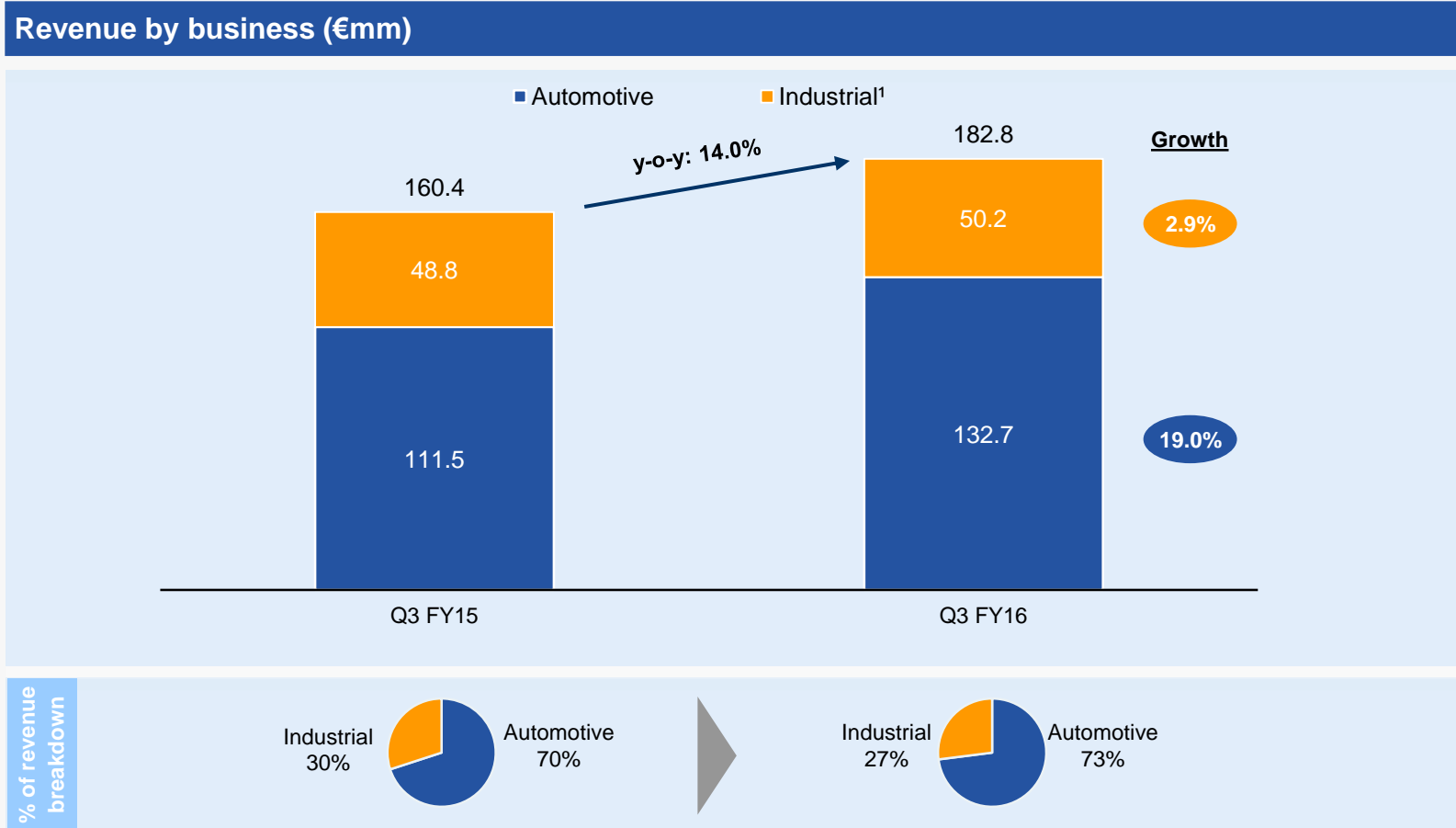
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3. Business by customer market

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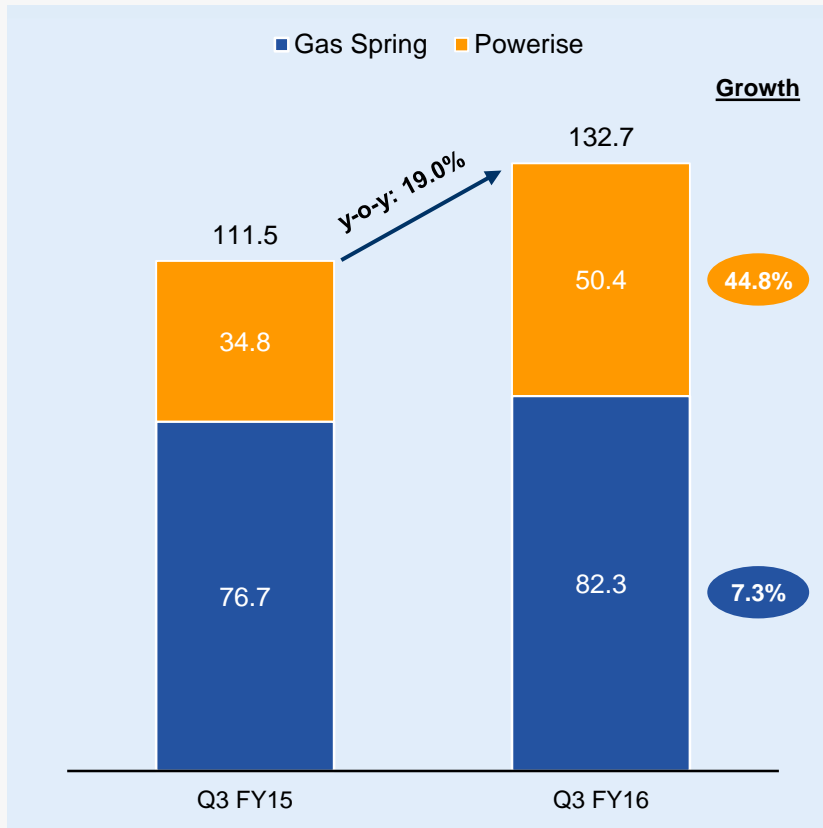
Q3 FY2016 revenue growth – by business (y-o-y)



Note: Stabilus fiscal year-end is September; ¹ Industrial including Swivel Chair revenue.
 Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

Q3 FY2016 revenue growth – Automotive business (y-o-y)

Revenue (€mm)



Key highlights

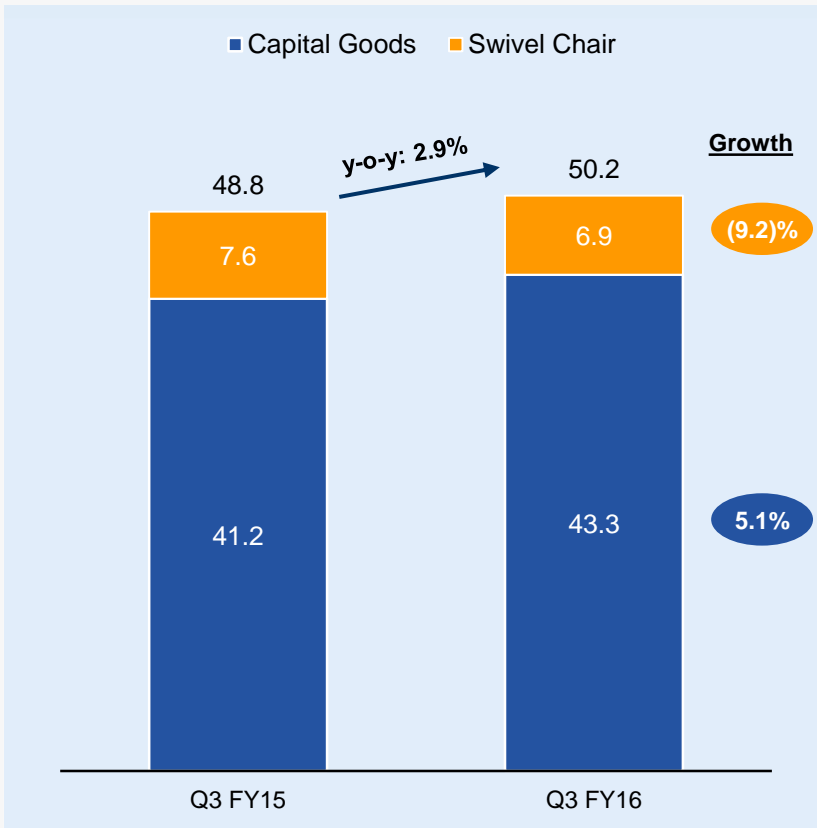
- Global car production in Q3 FY16 up to 22.9mm (+2.8% vs. 22.2mm in Q3 FY15)
- Continuing consumer trend towards SUV's supports automotive revenue development
- Automotive Gas Spring business with 7.3% revenue increase continues to outperform vehicle production growth
- 44.8% growth in Powerise reflects production ramp-ups and new product launches across various OEMs since Q3 FY15, e.g. Ford Galaxy, VW Passat CC, VW Phideon, BMW X1, GMC Terrain, Tesla Model X, Chevrolet SRX, Daimler GLC Coupe, Audi Q5, Opel Astra, Mini Countryman, Chrysler Pacifica

Note: Stabilus fiscal year-end is September.

Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

Q3 FY2016 revenue growth – Industrial business (y-o-y)

Revenue (€mm)



Key highlights

- Growth in Capital Goods business at 5.1% outperforms global economic growth
- Swivel Chair business soft in Q3 FY16: revenue down by €0.7mm (Europe -€0.5mm, NAFTA -€0.2mm); in 9M FY16 still revenue improvement by 1.4% to €21.6mm (9M FY15: 21.3mm)
- Strong Industrial growth despite continuing soft construction end-markets dynamics –Europe’s sales up by €1.2mm or 4.6%, NAFTA’s sales up by €0.6mm or 4.8%, Asia/Pacific and RoW’s sales up by €0.3mm or 13.0%

Note: Stabilus fiscal year-end is September.

Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

Third quarter results FY2016

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4. Outlook

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Outlook FY2016: Financial performance

	FY2015 Actual	FY2016 Guidance
Revenue	€611mm	€730mm
% Growth	20.5%	
% Adj. EBIT margin	12.5%	13.0-13.5%

Comments

- On track to deliver another record year, aiming for ambitious revenue and EBIT targets
- Strong European results support solid sector outlook
- Powerise continues to be a clear growth driver
- Revenue and adj. EBIT margin guidance for FY2016 increased to €730mm and 13.0-13.5% respectively, considering the expected Q4 FY16 performance of acquired companies and assuming a US\$/€ avg. fx rate in Q4 FY16 of 1.10 \$/€.

Third quarter results FY2016

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5. Appendix

Q3 FY2016 P&L overview

P&L (€mm)			
3 months ended	Q3 FY	June 2015 Actual	June 2016 Actual
Revenue		160.4	182.8
COGS		(122.6)	(137.7)
Gross Profit		37.8	45.1
<i>% margin</i>		23.6%	24.7%
R&D		(5.3)	(6.2)
S&M		(11.4)	(13.1)
G&A		(6.0)	(9.8)
Other income/expenses		0.5	0.4
Adjustments		4.2	7.2
Adj. EBIT		19.8	23.5
<i>% margin</i>		12.3%	12.9%
Depreciation & amortization (excl. PPA)		7.7	8.1
Adj. EBITDA		27.5	31.6
<i>% margin</i>		17.1%	17.3%

Advisory ¹	0.5	3.8
Restructuring / ramp-up	0.3	-
Pension interest add-back	0.2	0.2
PPA adjustments	3.2	3.2
Total adjustments	4.2	7.2

Note:

¹ Advisory expenses of €3.8mm in Q3 FY16 relate to the acquisition of ACE, Hahn Gasfedern and Fabreeka / Tech Products. Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

9M FY2016 P&L overview

P&L (€mm)			
9 months ended	9M FY	June 2015 Actual	June 2016 Actual
Revenue		453.0	531.0
COGS		(344.7)	(398.4)
Gross Profit		108.3	132.5
<i>% margin</i>		23.9%	25.0%
R&D		(16.8)	(19.2)
S&M		(32.7)	(36.1)
G&A		(19.4)	(23.6)
Other income/expenses		3.8	1.9
Adjustments		13.7	14.1
Adj. EBIT		56.9	69.7
<i>% margin</i>		12.6%	13.1%
Depreciation & amortization (excl. PPA)		22.6	24.6
Adj. EBITDA		79.4	94.3
<i>% margin</i>		17.5%	17.8%

Advisory ¹	1.3	3.8
Restructuring / ramp-up	2.1	-
Pension interest add-back	0.8	0.8
PPA adjustments	9.5	9.5
Total adjustments	13.7	14.1

Note:

¹ Advisory expenses of €3.8mm in 9M FY16 relate to the acquisition of ACE, Hahn Gasfedern and Fabreeka / Tech Products. Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

Balance sheet overview

Balance sheet (€mm)		
	September 2015 Actual	June 2016 Actual
Property, plant and equipment	134.0	166.5
Goodwill	51.5	189.1
Other intangible assets	166.5	298.7
Inventories	59.8	76.5
Trade receivables	62.8	92.1
Other assets	28.2	43.9
Cash	39.5	61.5
Total assets	542.2	928.2
Equity incl. minorities¹	76.7	100.1
Debt (incl. accrued interest) ¹	263.6	564.5
Pension plans and similar obligations	48.0	56.9
Deferred tax liabilities	39.0	72.7
Trade accounts payable	68.9	64.7
Other liabilities	46.0	69.4
Total equity and liabilities	542.2	928.2
<i>Net leverage ratio²</i>	2.1x	4.2x
<i>Net leverage ratio – pro-forma³</i>		~ 2.6x

Note: ¹ Pro-forma, post capital increase and equity bridge repayment in July 2016, equity up by €152.8mm (= €159.1mm gross proceeds less €6.3mm transaction costs) to €252.9mm and debt (incl. accrued interest) down by €115mm to €449.5mm.

² Net leverage ratio = net financial debt / adj. EBITDA LTM. Net financial debt defined as principal amount of senior facilities less cash.

³ Pro-forma, i.e. considering capital increase and refinancing in July 2016 as well as earnings (EBITDA) of acquired companies.

Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

Key highlights

- Preliminary purchase price allocation:
 - Purchase price €310.8mm (\$339mm base price and \$5.5mm price adj., at 1.11 \$/€ fx rate)
 - Intangibles mainly comprise €121.2mm customer relationship, €11.8mm technology, €3.6mm trademark, €137.6mm goodwill
- Old financial structure (as of Sept 30, 2015):
 - €267.5mm term loan facility and €50mm unutilized revolving credit facility (both due 2020)
- New financial structure (as of June 30, 2016, i.e. prior to capital increase on July 6, 2016):
 - €455mm term loan facility and €70mm unutilized revolving credit facility (both due 2021)
 - €115mm equity bridge facility (which was repaid on July 13, 2016, following the capital increase on July 6, 2016)

Cash flow overview and free cash flow (3M ended June 30, 2016)

Cash Flow Statement (€mm)			
3 months ended Q3 FY	June 2015 Actual	June 2016 Actual	June 2016 Adjusted ¹
Cash flow from operating activities	21.7	32.2	32.2
Cash flow from investing activities ²	(11.8)	(315.1)	(12.2)
Cash flow from financing activities ³	(11.6)	298.9	(3.6)
Net increase / (decrease) in cash	(1.7)	16.0	16.4
Effect of movements in exchange rates	(0.6)	(0.6)	
Cash as of beginning of the period	28.4	46.1	
Cash as of end of the period	26.1	61.5	

Free Cash Flow (€mm)			
3 months ended Q3 FY	June 2015 Actual	June 2016 Actual	June 2016 Adjusted ¹
Cash flow from operating activities	21.7	32.2	32.2
Cash flow from investing activities ²	(11.8)	(315.1)	(12.2)
Payments for interest	(20.6)	(1.5)	(1.5)
Free cash flow	(10.7)	(284.4)	18.5

Note:

¹ Adjusted = excluding effects from the acquisition of SKF Group entities and refinancing of senior facilities.

² Cash flow from investing activities in Q3 FY16 comprises cash outflow for the acquisition of SKF Group entities of €302.9mm (net of cash acquired).

³ Cash flow from financing activities in Q3 FY16 comprises cash inflow from refinancing of senior facilities of €302.5mm (=€455mm+€115mm-€267.5mm).

Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

Cash flow overview and free cash flow (9M ended June 30, 2016)

Cash Flow Statement (€mm)			
9 months ended 9M FY	June 2015 Actual	June 2016 Actual	June 2016 Adjusted ¹
Cash flow from operating activities	46.6	72.1	72.1
Cash flow from investing activities ²	(33.4)	(342.6)	(39.7)
Cash flow from financing activities ³	(21.9)	293.2	(9.3)
Net increase / (decrease) in cash	(8.6)	22.7	23.1
Effect of movements in exchange rates	1.2	(0.7)	
Cash as of beginning of the period	33.5	39.5	
Cash as of end of the period	26.1	61.5	

Free Cash Flow (€mm)			
9 months ended 9M FY	June 2015 Actual	June 2016 Actual	June 2016 Adjusted ¹
Cash flow from operating activities	46.6	72.1	72.1
Cash flow from investing activities ²	(33.4)	(342.6)	(39.7)
Payments for interest	(30.6)	(4.4)	(4.4)
Free cash flow	(17.4)	(274.9)	28.0

Note:

¹ Adjusted = excluding effects from the acquisition of SKF Group entities and refinancing of senior facilities.

² Cash flow from investing activities in 9M FY16 comprises cash outflow for the acquisition of SKF Group entities of €302.9mm (net of cash acquired).

³ Cash flow from financing activities in 9M FY16 comprises cash inflow from refinancing of senior facilities of €302.5mm (=€455mm+€115mm-€267.5mm).

Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

External revenue by region and customer market (3M ended June 30, 2016)

External revenue (€mm)			
3 months ended	Q3 FY	June 2015 Actual	June 2016 Actual
Gas Spring		34.6	37.5
Powerise		14.0	22.0
Industrial		26.3	27.5
Swivel Chair		6.3	5.8
Europe		81.2	92.7
Gas Spring		25.4	26.5
Powerise		20.7	28.2
Industrial		12.6	13.2
Swivel Chair		1.3	1.1
NAFTA		60.0	68.9
Gas Spring		16.8	18.4
Powerise		-	0.2
Industrial		2.3	2.6
Swivel Chair		0.1	0.1
Asia / Pacific and RoW		19.2	21.2
Total Gas Spring		76.7	82.3
Total Powerise		34.8	50.4
Total Industrial		41.2	43.3
Total Swivel Chair		7.6	6.9
Total		160.4	182.8

Note: Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

External revenue by region and customer market (9M ended June 30, 2016)

External revenue (€mm)			
9 months ended	9M FY	June 2015 Actual	June 2016 Actual
Gas Spring		101.0	107.1
Powerise		38.2	61.3
Industrial		74.0	79.8
Swivel Chair		17.8	18.2
Europe		231.1	266.3
Gas Spring		69.6	80.6
Powerise		59.9	79.6
Industrial		33.9	40.7
Swivel Chair		3.3	3.4
NAFTA		166.7	204.2
Gas Spring		49.0	53.6
Powerise		-	0.2
Industrial		6.1	6.6
Swivel Chair		0.1	0.1
Asia / Pacific and RoW		55.2	60.5
Total Gas Spring		219.7	241.3
Total Powerise		98.1	141.1
Total Industrial		113.9	127.0
Total Swivel Chair		21.3	21.6
Total		453.0	531.0

Note: Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.

Q3 and 9M FY2016 adj. EBITDA by region (3M and 9M ended June 30, 2016)

Adj. EBITDA by region (€mm)			
3 months ended	Q3 FY	June 2015 Actual	June 2016 Actual
Europe		17.4	19.7
NAFTA		6.4	7.8
Asia / Pacific and RoW		3.8	4.1
Total		27.5	31.6

9 months ended	9M FY	June 2015 Actual	June 2016 Actual
Europe		46.4	54.8
NAFTA		22.4	28.2
Asia / Pacific and RoW		10.7	11.4
Total		79.4	94.3

Note: Numbers rounded to one decimal. Due to rounding, numbers presented may not add up precisely to the totals provided.