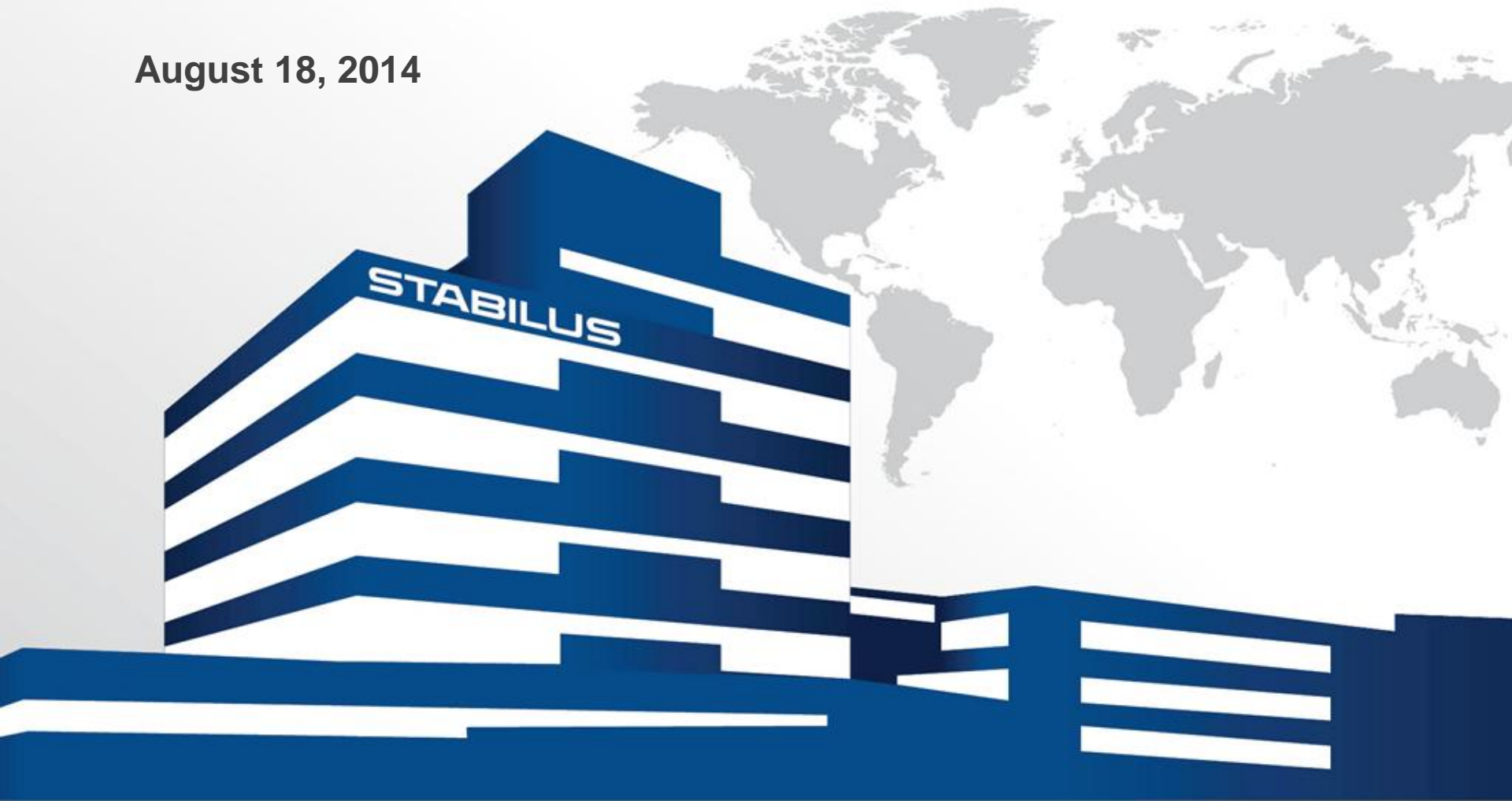


Third quarter results FY2014

August 18, 2014



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Agenda

1. Financial highlights
2. Industrial business
3. Automotive business
4. Appendix

Third quarter results FY2014

1. Financial highlights

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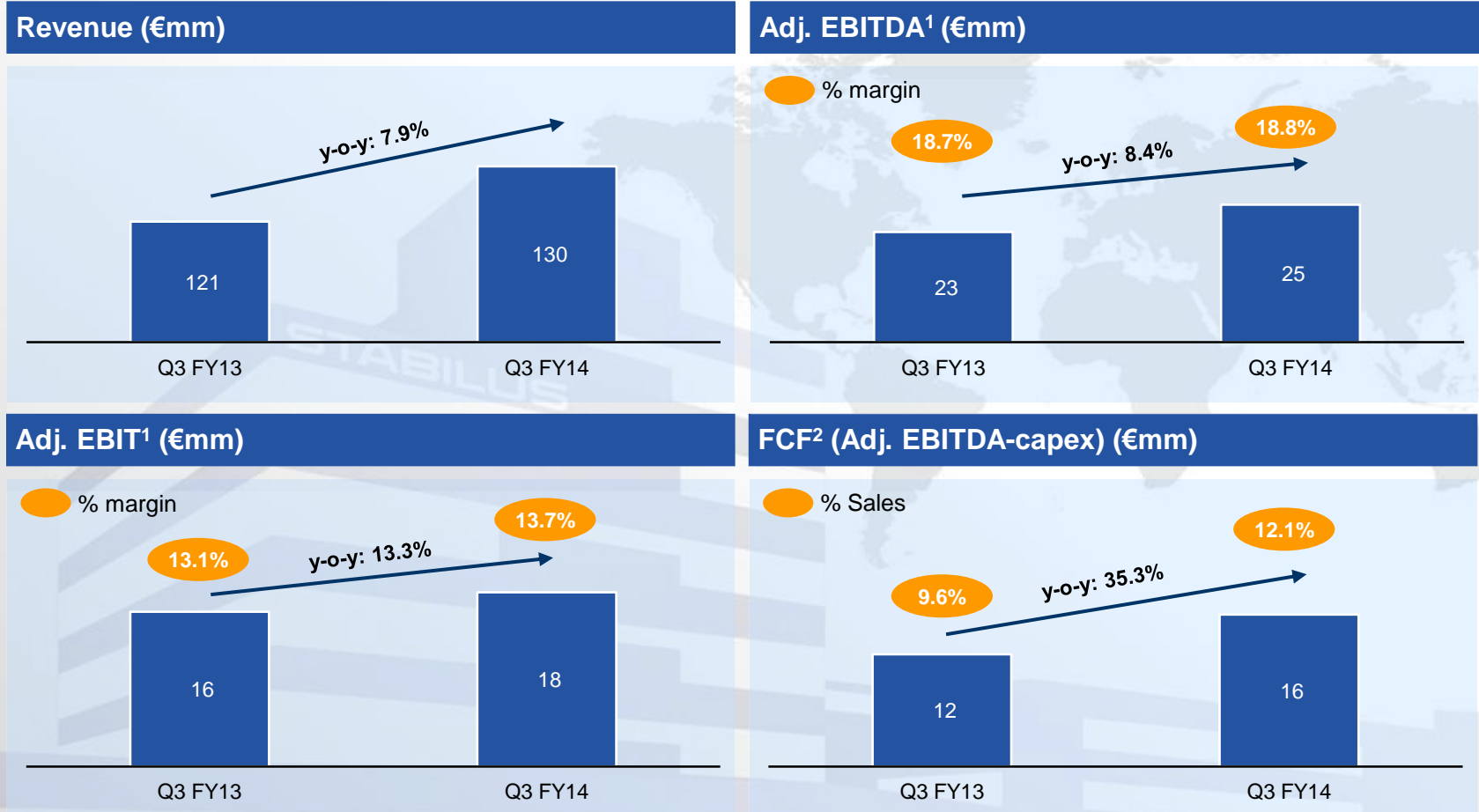
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Highlights Q3 FY2014

Fiscal year-end September

Sales	<ul style="list-style-type: none"> • Sales up by 7.9% to €130.2mm (+€9.5mm vs. Q3 FY13) • Growth in all operating segments / regions with NAFTA (+9.1%), Europe (+7.7%) and Asia / RoW (+4.6%) • Powerise sales up by 47.7%
Adj. EBITDA	<ul style="list-style-type: none"> • Adj. EBITDA up by 8.4% to €24.5mm (+€1.9mm vs. Q3 FY13) • Adj. EBITDA margin at 18.8% • Strong growth in NAFTA and Europe
Adj. EBIT	<ul style="list-style-type: none"> • Adj. EBIT up by 13.3% to €17.9mm (+€2.1mm vs. Q3 FY13) • Adj. EBIT margin at 13.7%
Net debt	<ul style="list-style-type: none"> • Net financial debt at €234mm • €58.9mm of senior secured notes redeemed from IPO proceeds
Guidance	<ul style="list-style-type: none"> • Forecasts for FY2014 key financial metrics: <ul style="list-style-type: none"> • Sales of ~€505mm • Adj. EBIT €65-67mm

Stabilus strong operating performance in Q3 FY2014 (y-o-y)



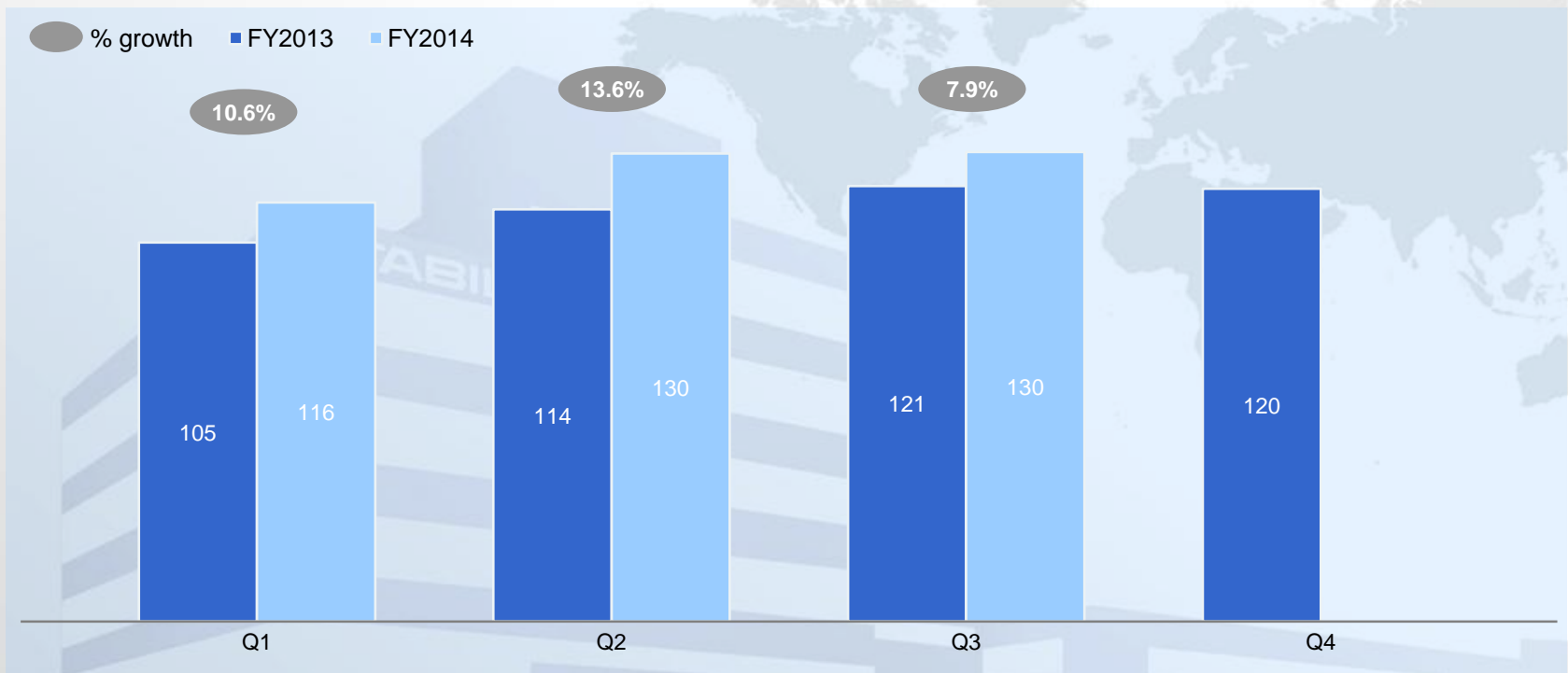
Note: Stabilus fiscal year-end is September

¹ Adj. EBIT/ EBITDA represents EBIT/ EBITDA, as adjusted by management primarily in relation to advisory fees, IPO related costs, restructuring / ramp-up costs and pension interest

² Simplified definition of FCF differs to more detailed presentation in quarterly report

Review of revenue performance by quarter

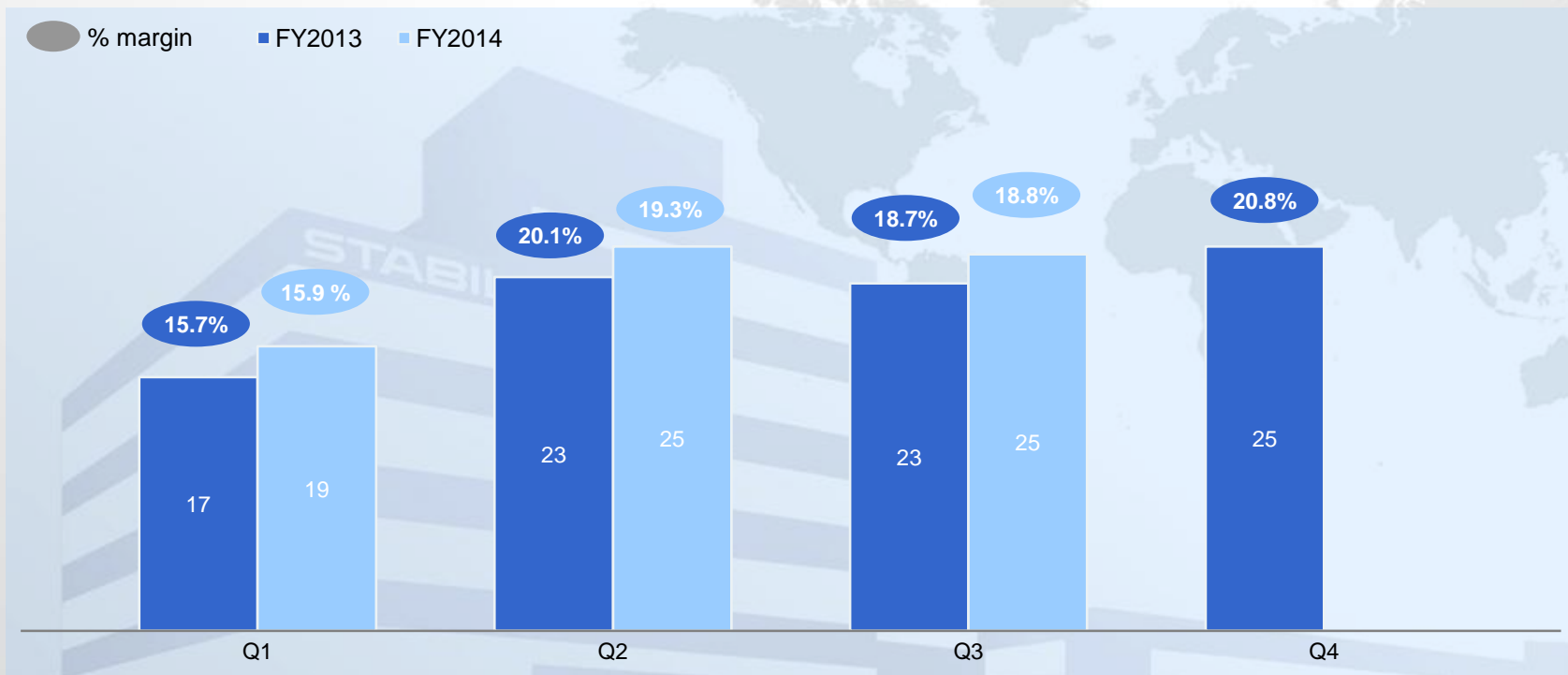
Revenue by quarter FY2013 vs. FY2014 (€mm)



Note: Stabilus fiscal year-end is September

Review of adj. EBITDA development by quarter

Adj. EBITDA¹ by quarter FY2013 vs. FY2014 (€mm)

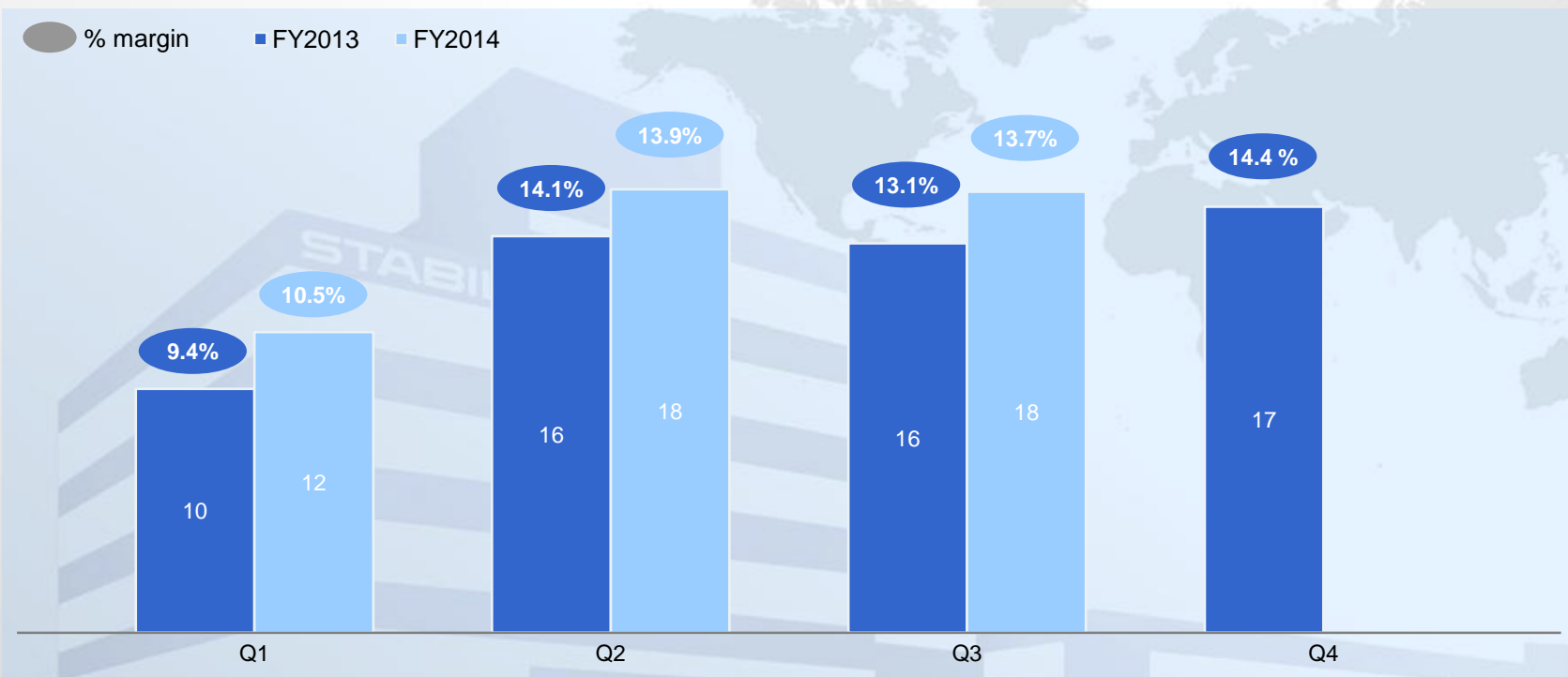


Note: Stabilus fiscal year-end is September

¹ Adj. EBITDA represents EBITDA, as adjusted by management primarily in relation to advisory fees, IPO related costs, restructuring / ramp-up costs and pension interest

Review of adj. EBIT development by quarter

Adj. EBIT¹ by quarter FY2013 vs. FY2014 (€mm)

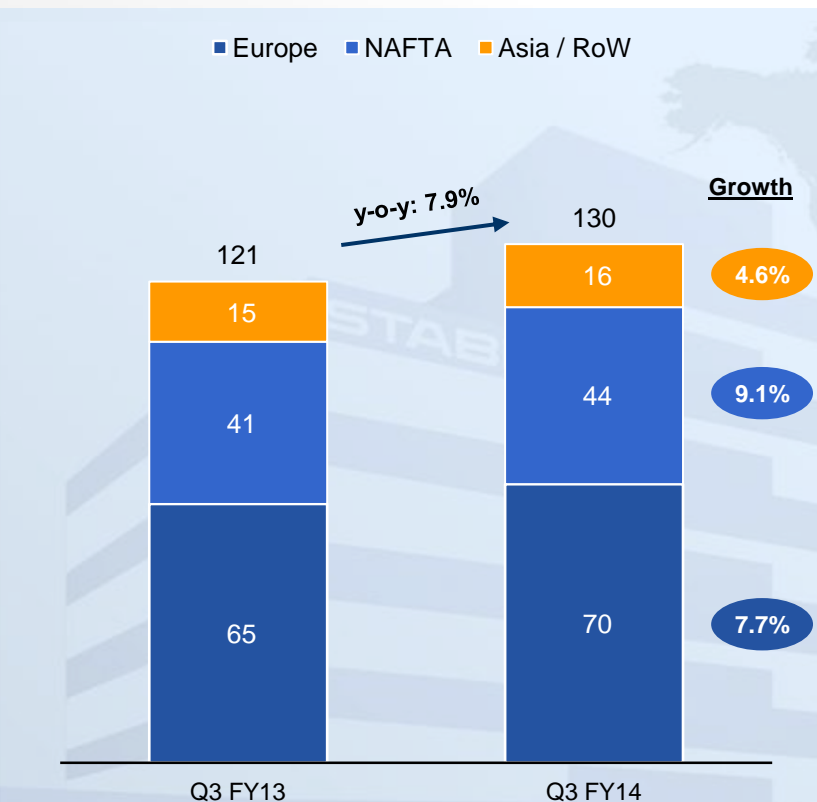


Note: Stabilus fiscal year-end is September

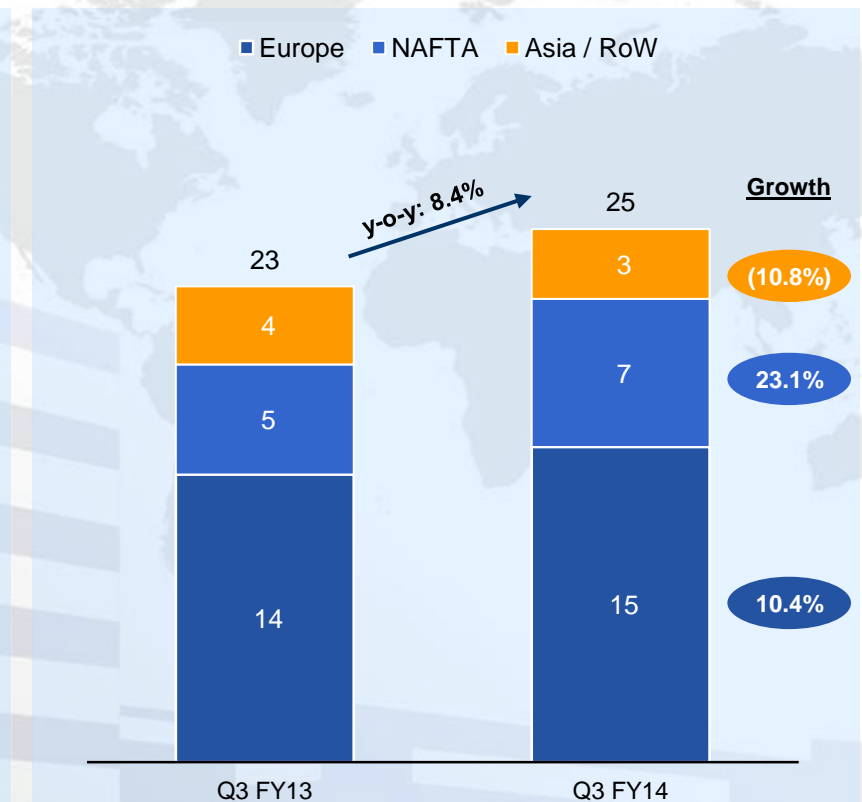
¹ Adj. EBIT represents EBIT, as adjusted by management primarily in relation to advisory fees, IPO related costs, restructuring / ramp-up costs and pension interest

Quarterly revenue and adj. EBITDA growth – by region (y-o-y)

Revenue by region¹ (€mm)



Adj. EBITDA^{1,2} by region (€mm)



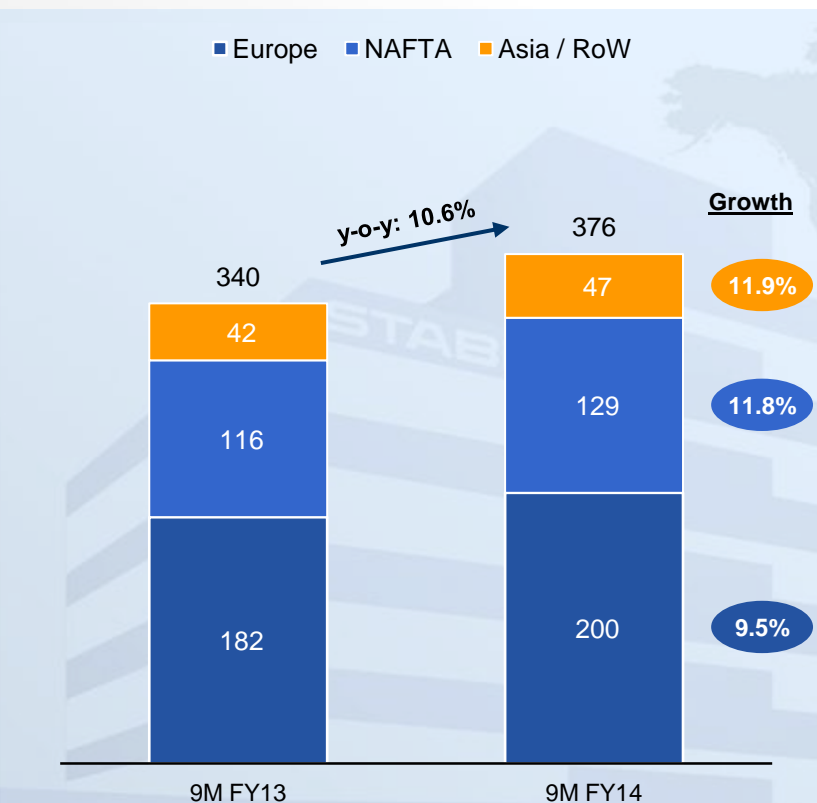
Note: Stabilus fiscal year-end is September; Detailed segmental data reflected in the Q3 report has been rounded for presentational reasons; Growth rates based on actual numbers

¹ Billed-from view

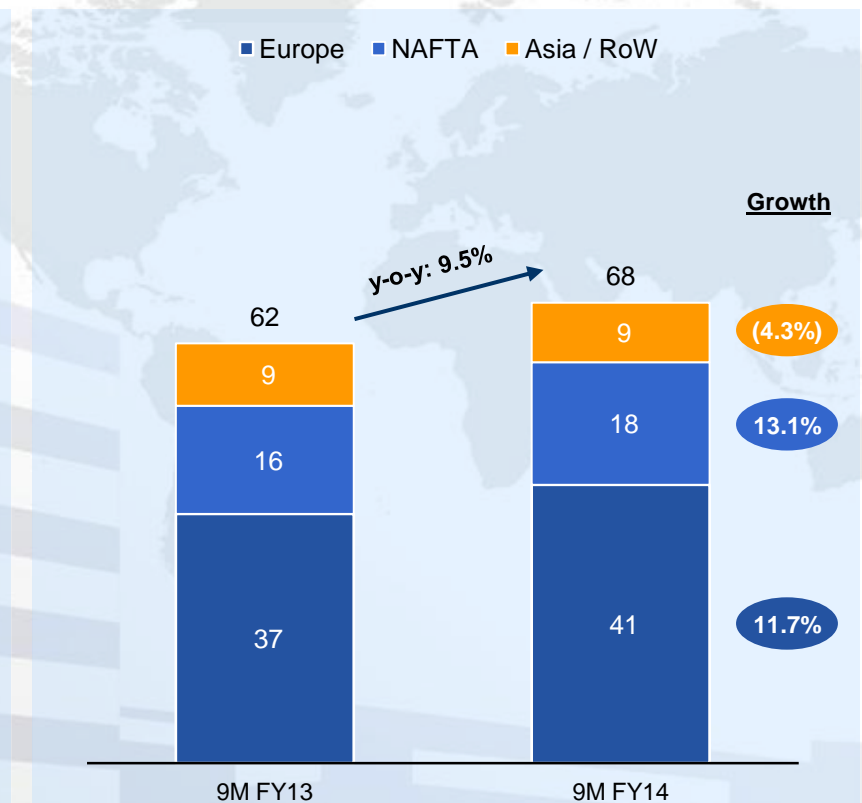
² Adj. EBITDA represents EBITDA, as adjusted by management primarily in relation to advisory fees, IPO related costs, restructuring / ramp-up costs and pension interest

YTD revenue and adj. EBITDA growth – by region (9M ended June 30, 2014)

Revenue by region¹ (€mm)



Adj. EBITDA^{1,2} by region (€mm)



Note: Stabilus fiscal year-end is September; Detailed segmental data reflected in the Q3 report has been rounded for presentational reasons; Growth rates based on actual numbers

¹ Billed-from view

² Adj. EBITDA represents EBITDA, as adjusted by management primarily in relation to advisory fees, IPO related costs, restructuring / ramp-up costs and pension interest

Third quarter results FY2014

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2. Business by market segment

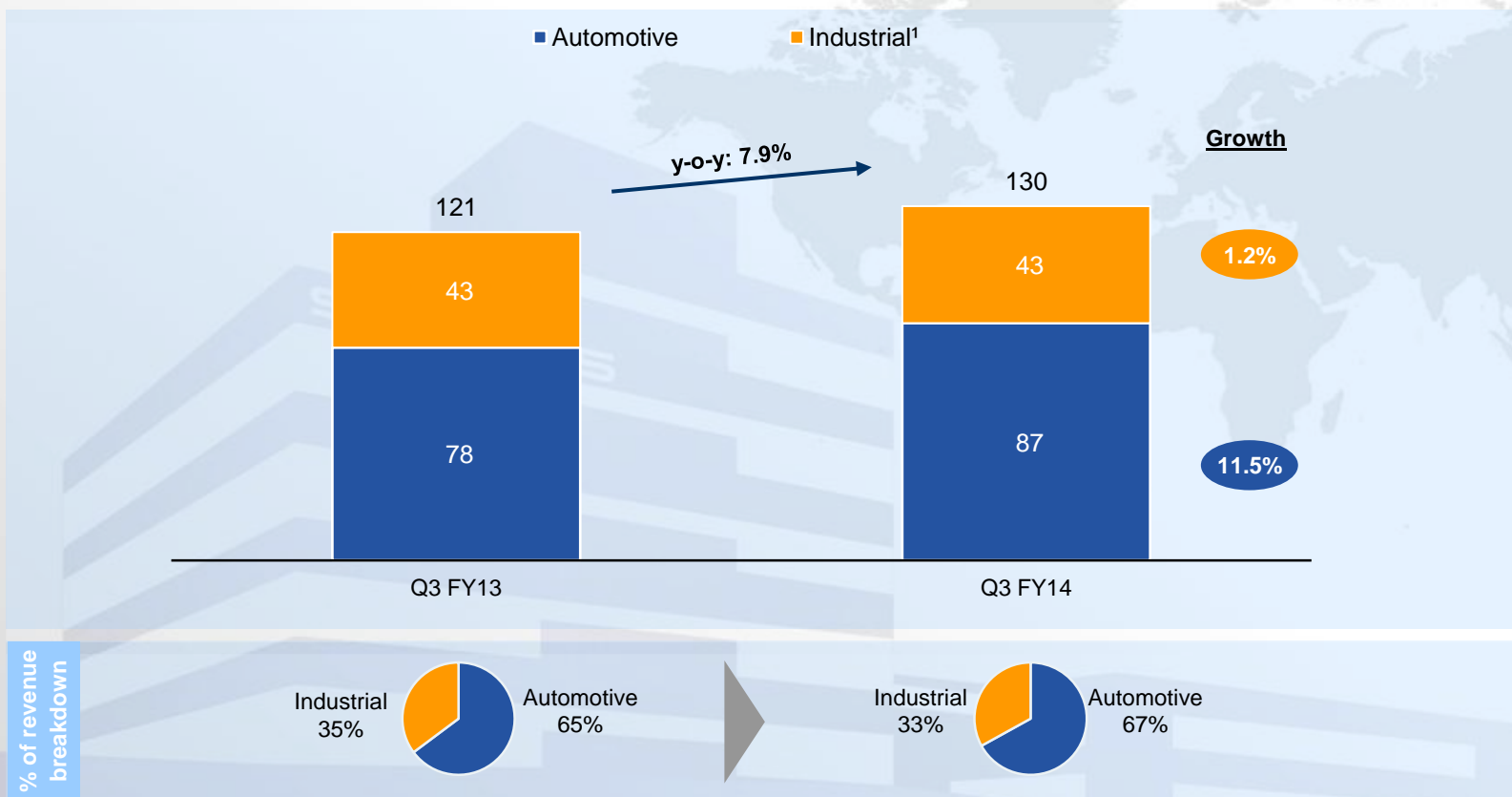
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Revenue growth – by business (y-o-y)

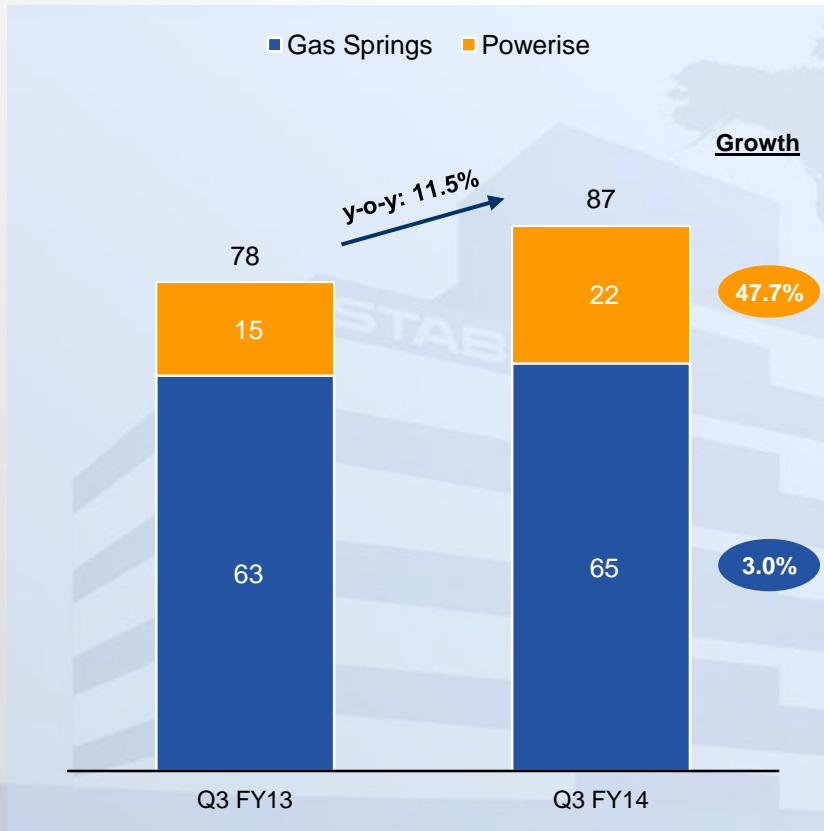
Revenue by business (€mm)



Note: Stabilus fiscal year-end is September; Detailed segmental data reflected in the Q3 report has been rounded for presentational reasons; Growth rates based on actual numbers; ¹ Industrial including Swivel Chair revenue

Revenue growth – Automotive business (y-o-y)

Revenues



Key highlights

- Global car production up 2.4% from 21.4mm to 21.9mm units y-o-y
- European car production up 1.9% from 5.2mm to 5.3mm units y-o-y
- Automotive gas spring business benefits from an increase in automotive production year over year as well as an increase in share of wallet from OEMs
- New Powerise launches continue to generate significant growth (e.g. BMW X5)
- Automotive revenue in China continues to develop strongly, with €1mm of revenue (+15%) y-o-y

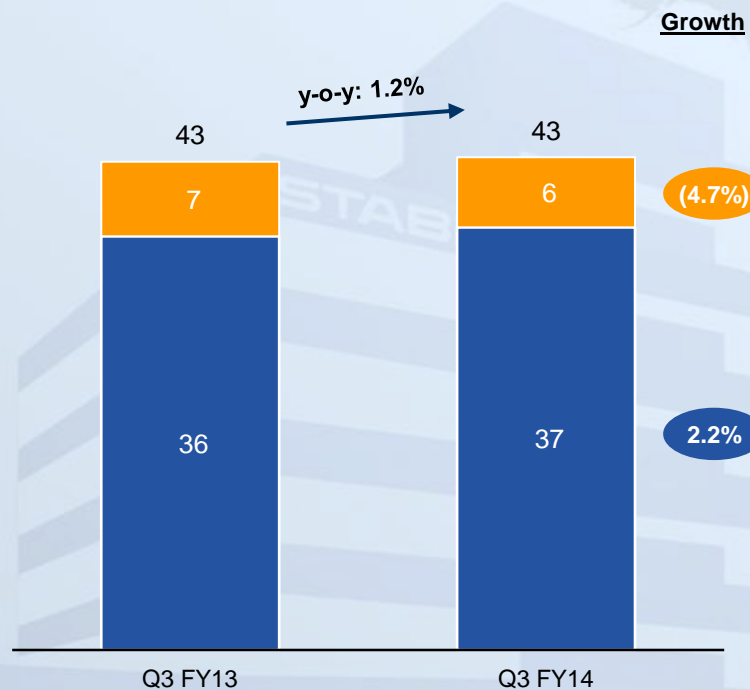
Source: IHS Automotive as of July 2014

Note: Stabilus fiscal year-end is September; Detailed segmental data reflected in the Q3 report has been rounded for presentational reasons; Growth rates based on actual numbers

Revenue growth – Industrial business (y-o-y)

Revenues

■ Capital Goods ■ Swivel Chair



Key highlights

- Quarterly y-o-y growth of the capital goods business was at 2.2%, supporting the positive YTD (9M ended June 30, 2014) growth rate of 4.9%
- In the Q3 FY14 we finalized the transfer of the Bloc-o-lift production from Germany to Romania (improved labour cost)
- In swivel chair we continue to drive forward our margin-focused turnaround strategy

Note: Stabilus fiscal year-end is September; Detailed segmental data reflected in the Q3 report has been rounded for presentational reasons; Growth rates based on actual numbers

Third quarter results FY2014

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3. Outlook

4.

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Outlook FY2014: Financial performance

	FY2013 Actual	FY2014 Guidance
Sales	€460mm	~€505mm
% Growth	3.7%	~10%
Adj. EBIT	€59mm	€65-67mm
% Margin	12.8%	~13%

Comments

- On track to deliver another record year, achieving ambitious revenue and EBIT targets
- Strong European results support solid sector outlook
- Powerise is a clear growth driver going forward



Financial calendar

• December 15, 2014

• Publication of full year results for fiscal year 2014 (Annual Report 2014)

• February 18, 2015

• Annual General Meeting for fiscal year 2014



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Third quarter results FY2014

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4. Appendix

Balance sheet overview

Balance sheet (€mm)		
	September 2013 Actual	June 2014 Actual
Property, plant and equipment	116	115
Goodwill	52	52
Other intangible assets	176	171
Inventories	46	49
Trade receivables	68	51
Other assets ³	110	41
Cash	22	22
Total assets	589	500
Equity incl. minorities	80	71
Debt (incl. accrued interest)	320	256
EUSIs ¹	3	0
Pension plans and similar obligations	39	42
Deferred tax liabilities	58	48
Trade accounts payable	45	45
Other liabilities	44	39
Total equity and liabilities	589	500
Net financial debt²	298	234
<i>Net financial debt / adj. EBITDA LTM</i>	<i>3.4x</i>	<i>2.4x</i>

¹ EUSIs were extinguished during the reorganization prior to the IPO and are no longer recognized on the company's balance sheet

² Excluding EUSIs of €3.3mm as of September 2013

³ Includes a €80mm face value upstream shareholder loan, extinguished as part of the IPO reorganization

Stabilus has successfully increased its cash flow generation (9M ended June 30, 2014)

Cash Flow Statement (€mm)

9 Months ended	June 2013 Actual	June 2014 Actual
Cash flows from operating activities	36	58
Cash flows from investing activities	(105)	(26)
Cash flows from financing activities	41	(32)
Net increase / (decrease) in cash	(28)	0
Effect of movements in exchange rates	(0)	(0)
Cash as of beginning of the period	42	22
Cash as of end of period	13	22