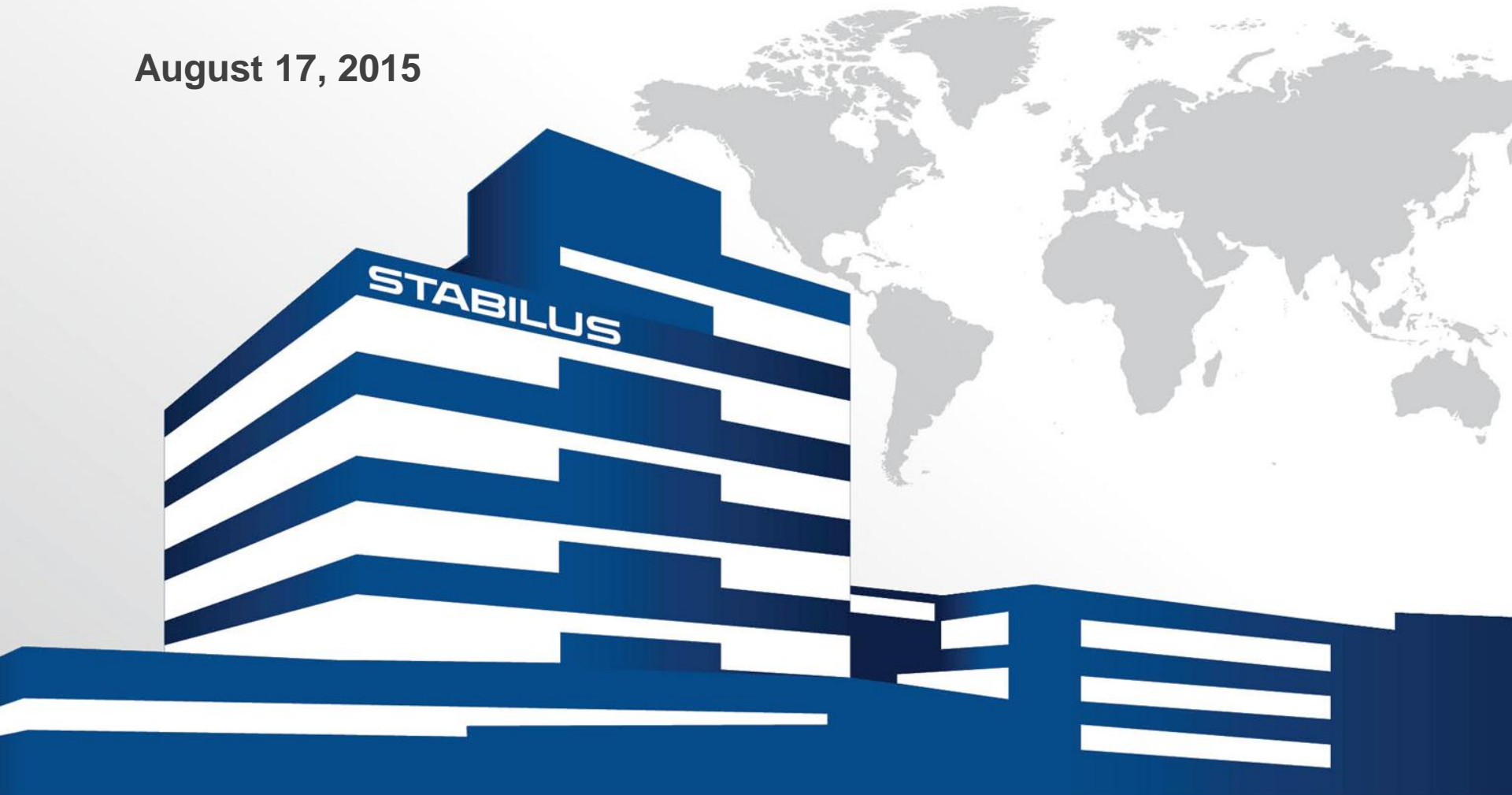


Third quarter results FY2015

August 17, 2015



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Agenda

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

Third quarter results FY2015

1. Financial highlights

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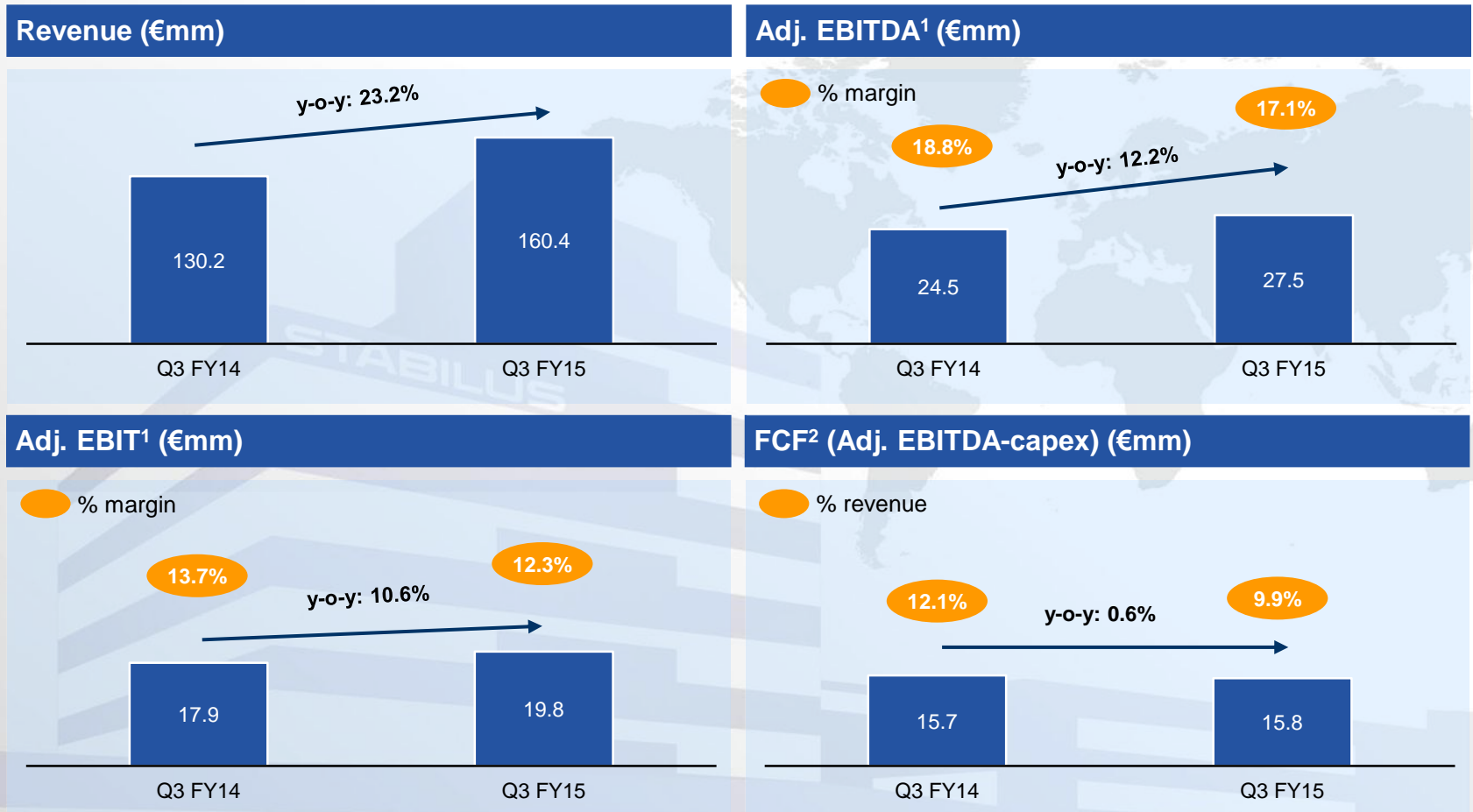
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Highlights Q3 FY2015

Fiscal year-end September

Revenue	<ul style="list-style-type: none"> • Revenue up by 23.2% to €160.4mm (+€30.2mm vs. Q3 FY14) • Growth in all regions with NAFTA (+35.1%), Asia / Pacific and RoW (+21.5%) as well as Europe (+16.2%) • Growth in all markets with Powerise (+58.9%), Swivel Chair (+22.6%), Gas Spring (+17.6%) and Capital Goods (+11.7%)
Adj. EBITDA	<ul style="list-style-type: none"> • Adj. EBITDA up by 12.2% to €27.5mm (+€3.0mm vs. Q3 FY14) • Adj. EBITDA margin at 17.1% (vs. Q3 FY14 margin of 18.8%)
Adj. EBIT	<ul style="list-style-type: none"> • Adj. EBIT up by 10.6% to €19.8mm (+€1.9mm vs. Q3 FY14) • Adj. EBIT margin at 12.3% (vs. Q3 FY14 margin of 13.7%)
Net debt	<ul style="list-style-type: none"> • Refinancing of the high-yield bond concluded on June 16, 2015 • Net financial debt of €239.9mm • Net financial debt / adj. EBITDA LTM decreased to 2.3x (vs. 2.5x as per FY2014)
Outlook	<ul style="list-style-type: none"> • Full year revenue guidance increased to €600mm • Adj. EBIT margin is expected to be in line with historic results at 12-13%

Stabilus strong operating performance in Q3 FY2015 (y-o-y)

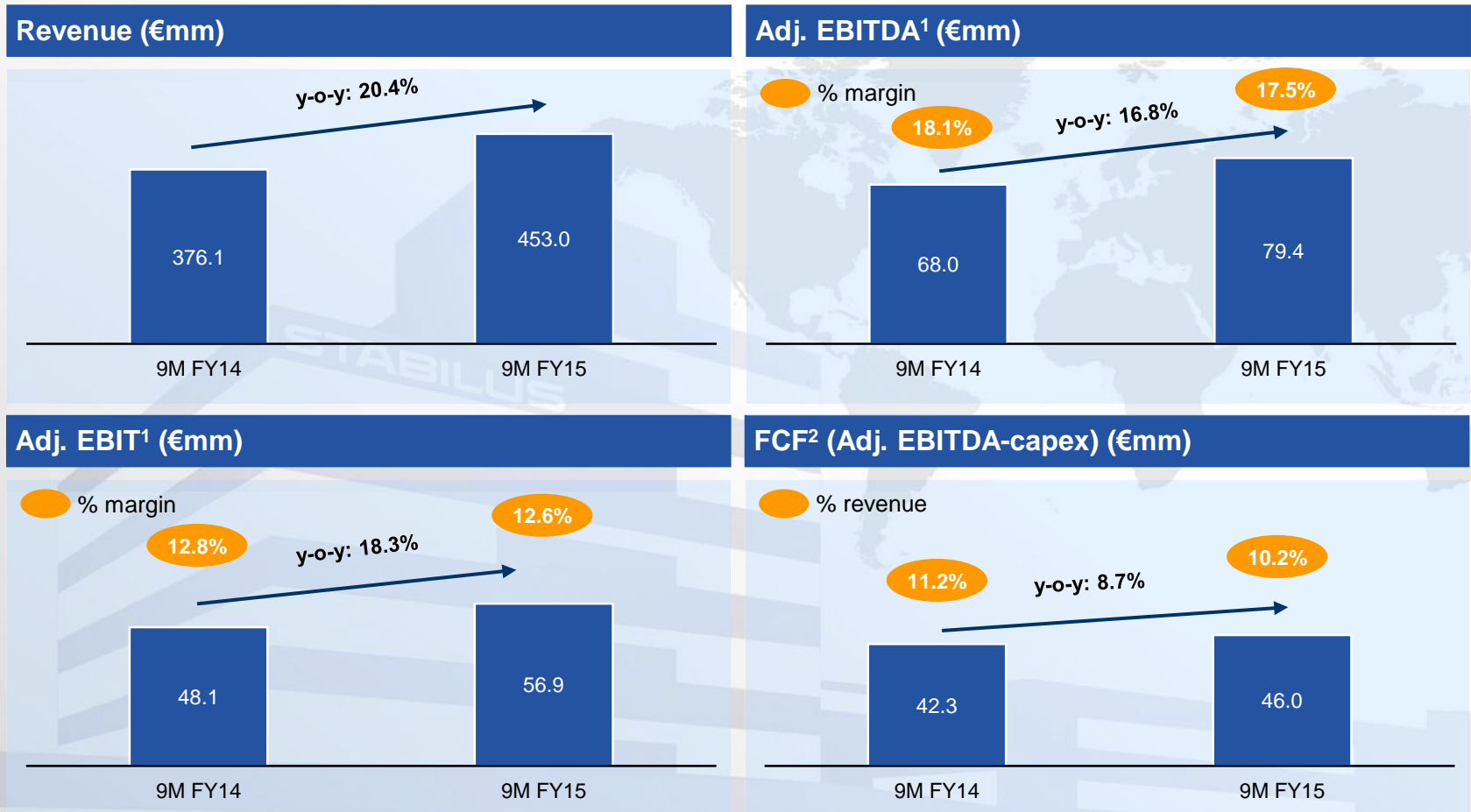


Note: Stabilus fiscal year-end is September

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

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

Stabilus strong operating performance in 9M FY2015 (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 expenses, restructuring / ramp-up expenses and pension interest

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

Third quarter results FY2015

2. Business by region

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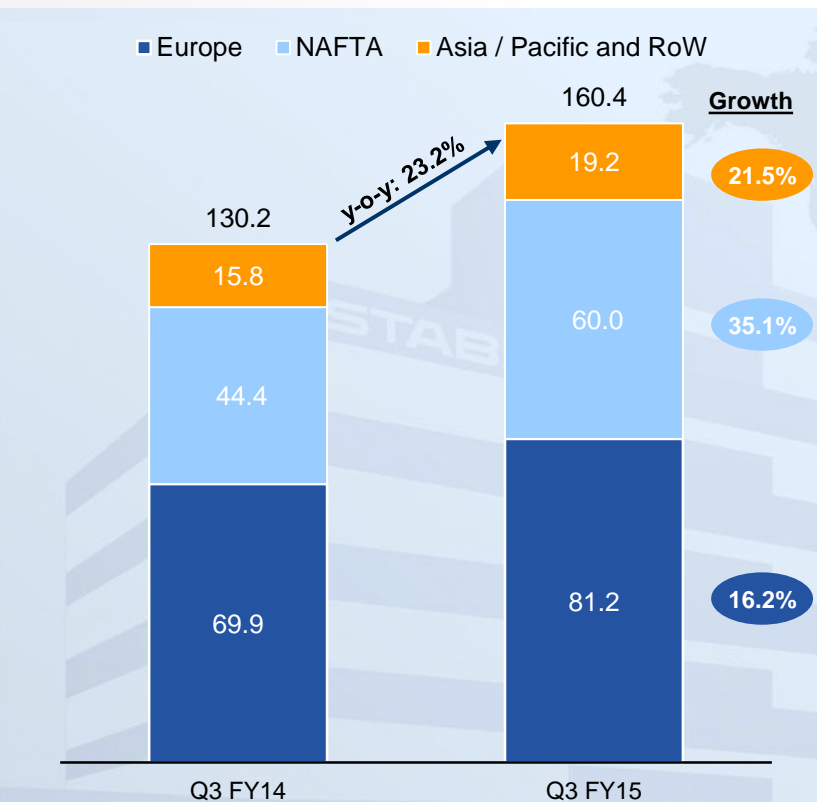
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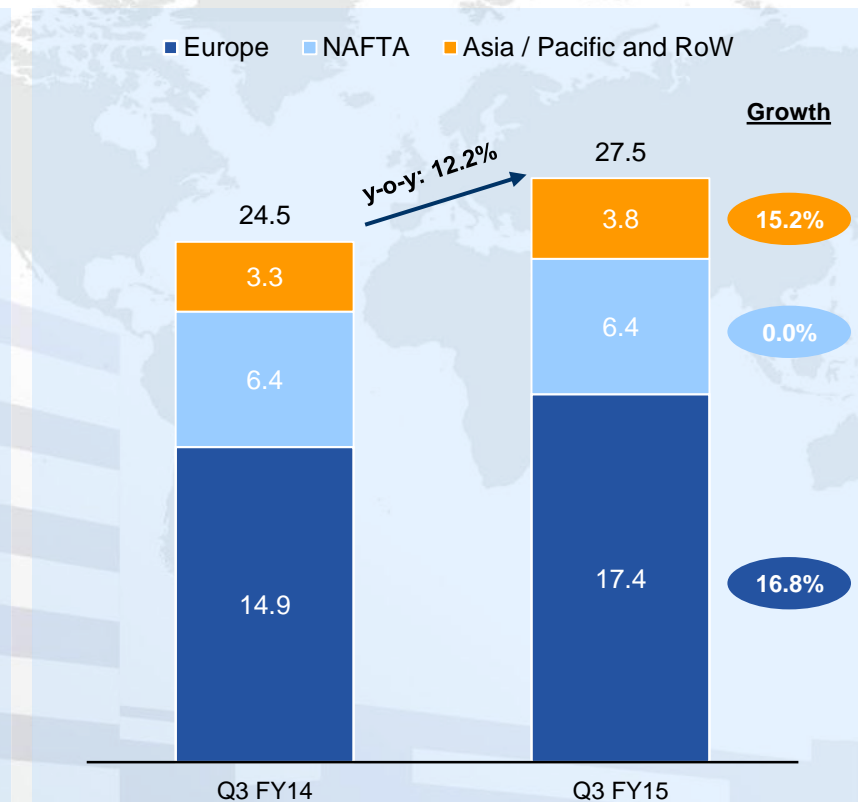
STABILUS

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

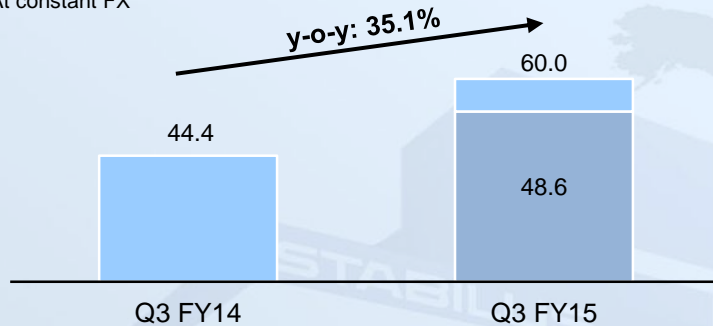
¹ Billed-from view, without intersegment revenue.

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

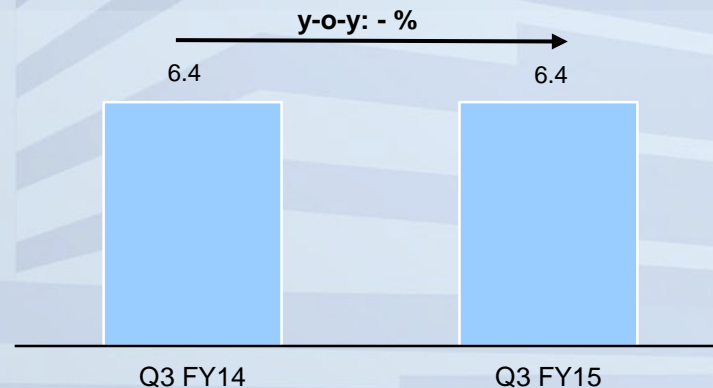
NAFTA – Revenue growth (y-o-y)

Revenue¹ (€mm)

At incurred FX
At constant FX



Adj. EBITDA (€mm)



Key highlights

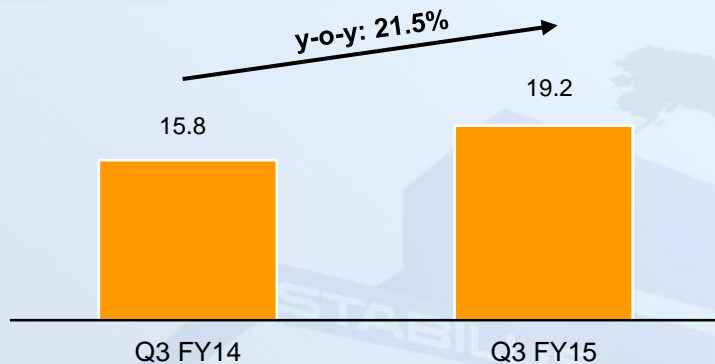
- NAFTA car production in Q3 FY15 at 4.5mm units, i.e. +2.5% vs. previous year
- NAFTA Q3 revenue increased by 35.1% to €60.0mm (37.4% of group revenue vs. 34.1% in Q3 FY14)
- Revenue in US\$ terms improved by 9.3% to \$66.7mm in Q3 FY15 vs. \$61.0mm in Q3 FY14
- US: preparation for the installation of an additional fully automated gas spring production line and for the set up of an improved aftermarket distribution process
- Mexico: preparation for the installation of the fifth Powerise line
- NAFTA profitability in Q3 FY15 is impacted by an increase of warranty provision

Note: Stabilus fiscal year-end is September

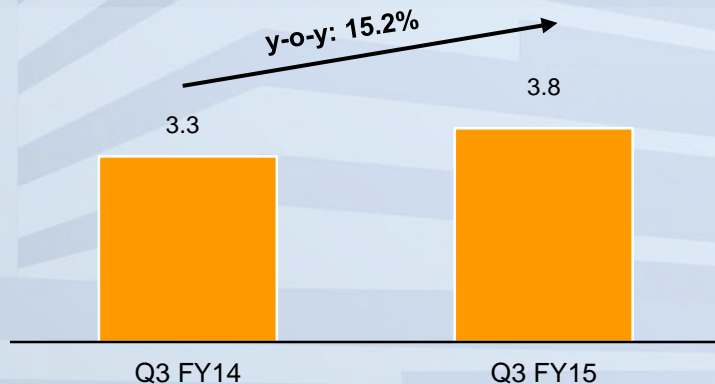
¹ External revenue only

Asia / Pacific and RoW – Revenue growth (y-o-y)

Revenue¹ (€mm)



Adj. EBITDA (€mm)



Key highlights

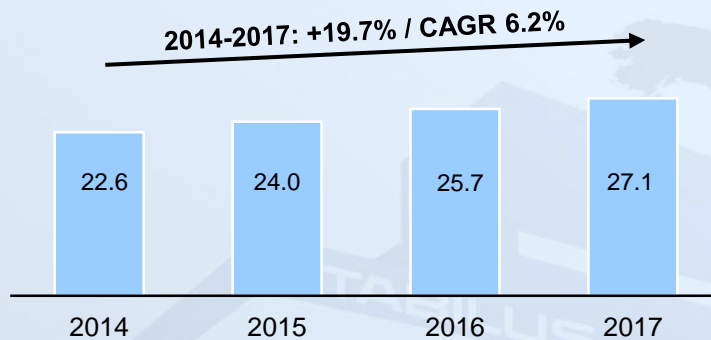
- Asia/Pacific and RoW car production in Q3 FY15 at 12.3mm units, i.e. -1.1% vs. previous year
- Strong year-over-year revenue growth of 21.5% in Q3 FY15 mainly driven by automotive gas springs
- China: China's Q3 FY15 revenue at €11.3mm (+34.5% vs. Q3 FY14); China 9M FY15 revenue at €32.4mm (+27.6% vs. 9M FY14); China's revenue is approx. 7 % of group revenue
- Korea: new powder coating line installed, preparation to start production in July 2015
- Brazil continues to show revenue weakness and its EBITDA is €0.1mm below prior year

Note: Stabilus fiscal year-end is September

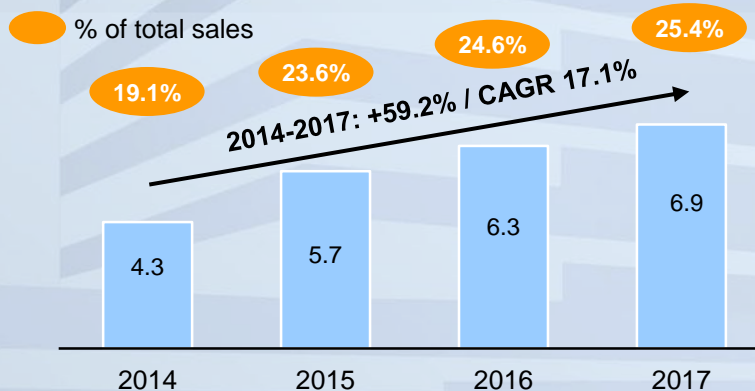
¹ External revenue only

China: Increasing share of SUV sales offers potential for more gas springs

China car sales (mm units)



China SUV sales (mm units)



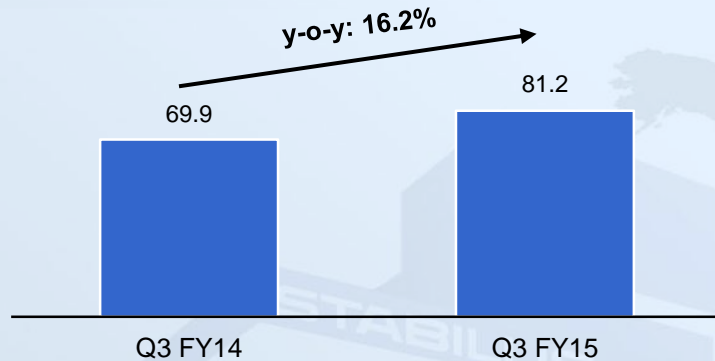
Source: Vehicle Production Forecast June 2015

Key highlights

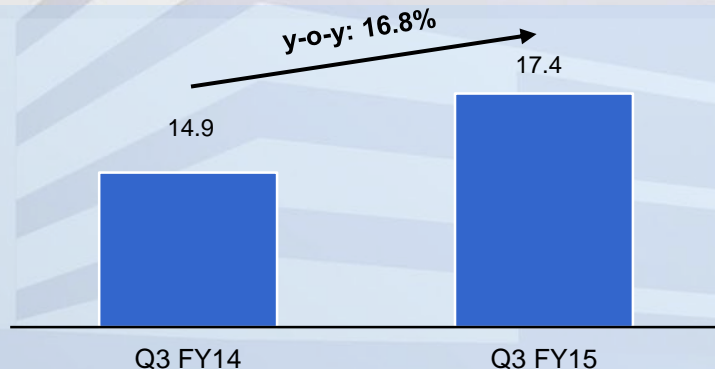
- Growth of China's automobile market
 - Automobile market growth shows a 6.2% CAGR or 4.5mm units increase over the next three years
- Gas spring sales should outperform the automotive market growth due to the increased share of SUVs (from 19.1% in 2014 to 25.4% in 2017)
 - SUV annual sales expected to show a 17.1% CAGR or 2.6mm units increase over the next three years
 - The strong SUV trend offers more gas spring installations (SUVs typically require two gas springs for the tailgate)

Europe – Revenue growth (y-o-y)

Revenue¹ (€mm)



Adj. EBITDA (€mm)



Key highlights

- Car production in Q3 FY15 at 5.3mm units, i.e. -1.9% vs. previous year
- Europe's Gas Spring revenue increased by 3.9% to €34.6mm in Q3 FY15 (in 9M FY15 up to €101.1mm, +4.2% yoy)
- European Powerise revenue more than doubled in Q3 FY15 (€14.0mm in Q3 FY15 vs. €6.2mm in Q3 FY14 and €38.2mm in 9M FY15 vs. €13.6mm in 9M FY14)
- Germany: construction of a fully-automated gas spring production line with capacity of ~7mm units p.a. in progress; expected start of production: Jan 2016

Note: Stabilus fiscal year-end is September
¹ External revenue only

Third quarter results FY2015

3. Business by customer market

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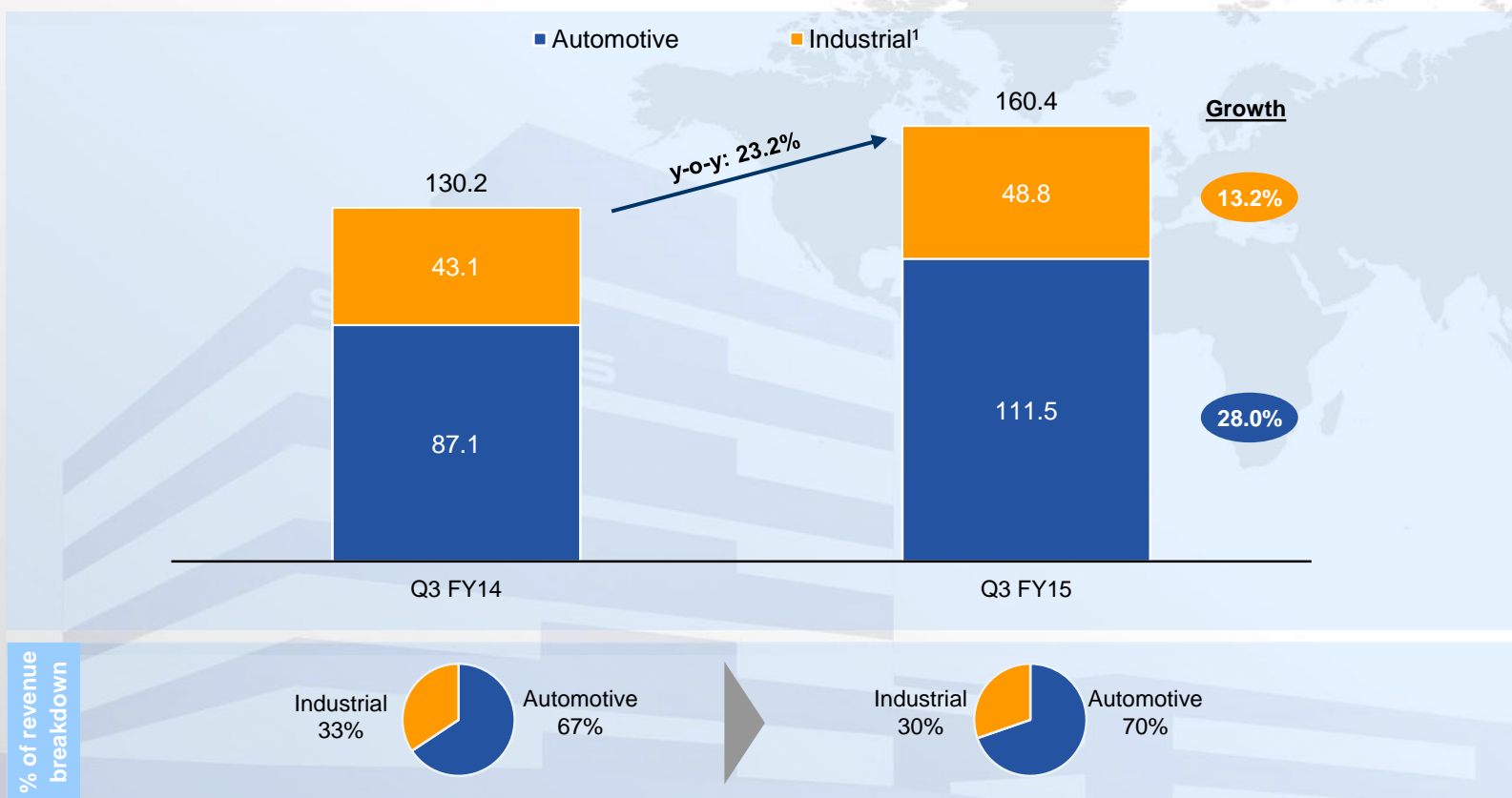
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Revenue growth – by business (y-o-y)

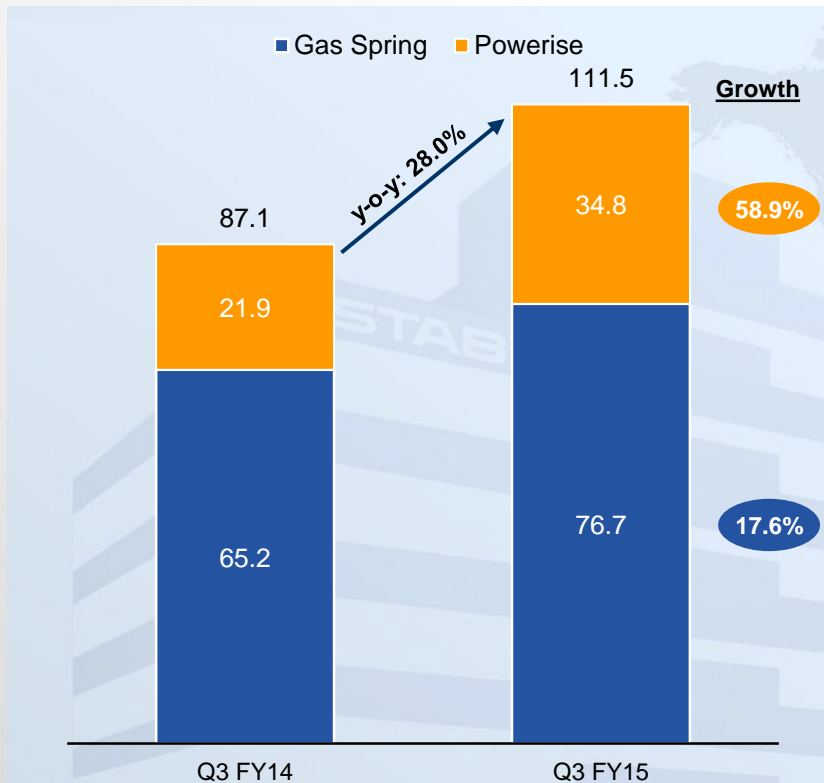
Revenue by business (€mm)



Note: Stabilus fiscal year-end is September; ¹ Industrial including Swivel Chair revenue

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

Revenue



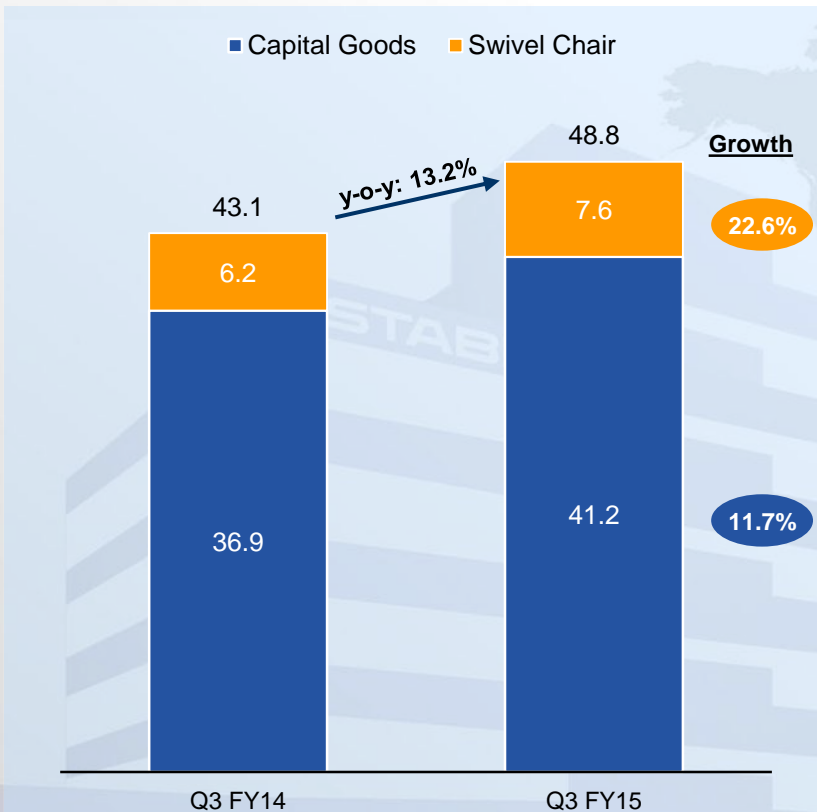
Key highlights

- Global car production in Q3 FY15 down to 22.1mm (-0.5% vs. 22.2mm in the previous year)
- Automotive Gas Spring business with 17.6% revenue increase continues to outperform vehicle production growth
- Continuing consumer trend towards SUV's supports automotive revenue development
- 58.9% growth in Powerise reflects new product launches across various OEMs in Q3 FY15

Note: Stabilus fiscal year-end is September

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

Revenue



Key highlights

- Growth in industrial business at 13.2% continues to outperform global economic growth
- Swivel Chair revenue improvement of 22.6% confirms success of the turnaround strategy and customer interest
- Strong industrial growth despite continuing soft agriculture and construction end-markets dynamics

Note: Stabilus fiscal year-end is September

Third quarter results FY2015

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4. Outlook

5.

Outlook FY2015: Financial performance

	FY2014 Actual	FY2015 Guidance
Revenue	€507mm	€600mm
% Growth	10.3%	18.3%
% Adj. EBIT margin	12.8%	12-13%

Comments

- On track to deliver another record year, achieving ambitious revenue and EBIT targets
- Strong European results support solid sector outlook
- Powerise continues to be a clear growth driver going forward
- Revenue guidance for FY2015 increased from €575-585mm to €600mm due to expected performance in Q4 and the continuing strength of the US dollar (assumed average rate per €1: \$1.10 in Q4 FY2015)
- Adj. EBIT margin guidance unchanged at 12-13%



Financial calendar

November 27, 2015

- Preliminary Financial Results FY2015

December 21, 2015

- Annual Report 2015

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www.ir.stabilus.com

Third quarter results FY2015

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5. Appendix

P&L overview

P&L (€mm)			
3 months ended	Q3 FY	June 2014 Actual	June 2015 Actual
Revenue		130.2	160.4
COGS		(97.9)	(122.6)
Gross Profit		32.2	37.8
<i>% margin</i>		24.7%	23.6%
R&D		(4.9)	(5.3)
S&M		(9.9)	(11.4)
G&A		(18.2)	(6.0)
Other income/expenses		0.3	0.5
Adjustments		18.3	4.2
Adj. EBIT		17.9	19.8
<i>% margin</i>		13.7%	12.3%
Depreciation & amortization (exc. PPA)		6.6	7.7
Adj. EBITDA		24.5	27.5
<i>% margin</i>		18.8%	17.1%

Advisory	14.1	0.5
Restructuring / ramp-up	0.6	0.3
Pension interest add-back	0.4	0.2
PPA adjustments	3.2	3.2
Total Adjustments	18.3	4.2

Note: 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 2014 Actual	June 2015 Actual
Property, plant and equipment	119.6	128.0
Goodwill	51.5	51.5
Other intangible assets	171.0	168.7
Inventories	49.5	58.4
Trade receivables	56.5	75.2
Other assets	38.7	25.2
Cash	33.5	26.1
Total assets	520.3	532.9
Equity incl. minorities	76.1	69.1
Debt (incl. accrued interest)	262.3	266.0
Pension plans and similar obligations	48.4	48.4
Deferred tax liabilities	43.8	42.7
Trade accounts payable	53.7	61.1
Other liabilities	36.0	45.6
Total equity and liabilities	520.3	532.9
Net financial debt	228.9	239.9
<i>Net financial debt / adj. EBITDA LTM</i>	2.5x	2.3x

Refinancing in June 2015

- Old financial structure (until June 16, 2015):
 - High-yield bond due 2018 with the remaining €256.1 principal amount and 7.75% interest rate and a committed €25 million revolving credit facility
- New financial structure (from June 16, 2015):
 - €270 million term loan facility and €50 million revolving credit facility (both due 2020) with an interest rate of currently 2% over Euribor
- Refinancing impact on FY2015 earnings and cash flow:
 - €9.9 million early redemption fee
 - €4.7 million transaction costs, thereof €4.4 million capitalized
 - €15.4 million loss from the derecognition of embedded derivatives (non-cash item)

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

Cash flow overview (9M ended June 30, 2015)

Cash Flow Statement (€mm)			
9 months ended	9M FY	June 2014 Actual	June 2015 Actual
Cash flow from operating activities		58.1	46.6
Cash flow from investing activities		(25.7)	(33.4)
Cash flow from financing activities		(32.2)	(21.9)
Net increase / (decrease) in cash		0.2	(8.6)
Effect of movements in exchange rates		(0.1)	1.2
Cash as of beginning of the period		21.8	33.5
Cash as of end of period		22.0	26.1

Comments

- In 9M FY14 begin of sale of receivables program (factoring); €20.2mm trade receivables were sold to a factor, resulting in a cash-in of €19.1mm in March 2014.

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 (3M ended June 30, 2015)

External revenue (€mm)			
3 months ended	Q3 FY	June 2014 Actual	June 2015 Actual
Gas Spring		33.3	34.6
Powerise		6.2	14.0
Industrial		25.1	26.3
Swivel Chair		5.3	6.3
Europe		69.9	81.2
Gas Spring		18.3	25.4
Powerise		15.7	20.7
Industrial		9.6	12.6
Swivel Chair		0.8	1.3
NAFTA		44.4	60.0
Gas Spring		13.7	16.8
Powerise		-	-
Industrial		2.2	2.3
Swivel Chair		-	0.1
Asia / Pacific and RoW		15.8	19.2
Total		130.2	160.4

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, 2015)

External revenue (€mm)			
9 months ended	9M FY	June 2014 Actual	June 2015 Actual
Gas Spring		97.0	101.1
Powerise		13.6	38.2
Industrial		73.1	74.0
Swivel Chair		16.1	17.8
Europe		199.8	231.1
Gas Spring		53.3	69.6
Powerise		46.2	59.9
Industrial		27.3	33.9
Swivel Chair		2.3	3.3
NAFTA		129.2	166.7
Gas Spring		41.3	49.0
Powerise		-	-
Industrial		5.8	6.1
Swivel Chair		0.1	0.1
Asia / Pacific and RoW		47.1	55.2
Total		376.1	453.0

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