



Tech Talk

JUNE 23, 2022

Forward Looking Statements

As a reminder, we will be presenting certain forward-looking statements on this call that are based on Management's current expectations and views regarding future events and operating performance and are subject to uncertainties and changes in circumstances. Our actual results may differ materially from the forward-looking statements for a number of reasons. Our forward-looking statements are applicable only as of the date of this presentation. For a list of the factors which could affect our future results, including our earnings estimates, see forward-looking statements included in "Item 7. Management's Discussion and Analysis of Financial Condition and Results of Operations," set forth in our Annual Report on Form 10-K for the fiscal year ended March 31, 2022, which was filed with the U.S. Securities and Exchange Commission.

In addition, we will also be presenting certain non-GAAP financial measures. For an explanation of the differences between the comparable GAAP financial information and the non-GAAP information, please see our company's Form 8-K which includes our press release dated May 25, 2022, which is located on our website at www.enersys.com.

Key Takeaways

The EnerSys logo is displayed in a bold, black, sans-serif font. A red diagonal line cuts through the 'S' in 'Sys' from the bottom-left to the top-right. A registered trademark symbol (®) is located to the right of the 'S'. The logo is positioned on the left side of a light gray rounded rectangular background.

We are a global **Industrial Technology** company delivering highly differentiated **Energy Solutions** to **Diverse End Markets**



Our **Proprietary Technologies and Services** play a critical role in the energy transition fueled by **Megatrends**



Our engineering drivers are based on an **Efficient Design Methodology**, enabling us to leverage our **Core Technology Platforms** across our served end markets

EnerSys At A Glance (NYSE: ENS)

LEADING PROVIDER OF DIFFERENTIATED ENERGY SOLUTIONS

\$3.4bn¹

Sales

7.9%¹

Adj. Operating Margin

\$4.47¹

Adj. Diluted EPS

~11.4k¹

Total Employees

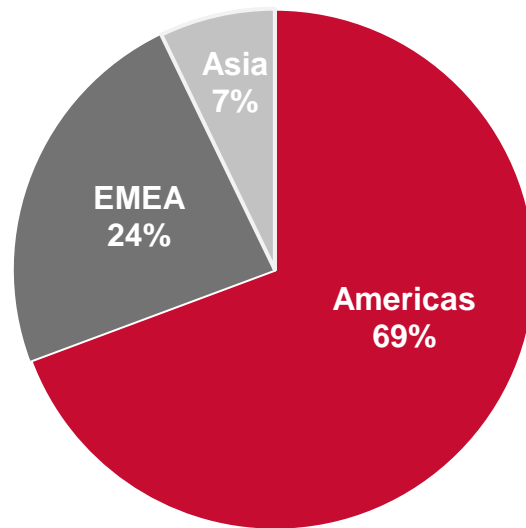
10k+¹

Customers

22%¹

Market Share²

FY'22 SALES BY GEOGRAPHY



GLOBAL CUSTOMER BASE³



1. FY'22, year end March 31, 2022

2. Source: BCI, Eurobat industry reports and management estimates based on the markets where EnerSys participates. Market size and share are for batteries and chargers only. It excludes power solution and services to broadband, telecom and other markets, and the aerospace & defense and cabinet enclosures markets (each estimated at \$1 to \$2 billion)

3. Represents geographies with EnerSys manufacturing and distribution centers

Technology Driven Portfolio Transformation

2010

- Traditional lead acid battery company
- Narrow set of end markets
- Limited scale

2022

- Integrated technology solutions across energy storage, power electronics, and software & services
- Broad exposure to a wide range of end markets with secular growth trends
- Enhanced scale

Growth Opportunities

- Expand capacity for premium products
 - Grow **Motive Power maintenance-free** solutions
 - Increase **Transportation market share**
- Leverage **5G and other megatrends** with proprietary technologies
 - Small Cell build out
 - Battery management and software platforms
 - Fast Charge & Storage launch
- Reduce costs through **EOS** and volume leverage

Transformed Through Strategic Initiatives and Disciplined M&A

Strategic Initiatives

- ✓ Expansion of TPPL product line
- ✓ Launched lithium platform
- ✓ End market / product diversification

M&A



2010



2013



2015



2018



2019

Baukasten – Simple at the Core

- Simplified supply chain
- Scale
- Time to market
- Reliability



Technology To Meet Customer Needs

Lithium-ion

- Maintenance-free, longer cycle life, fastest charge rate
- Innovative safety technology
- Ideal for use cases requiring high power density / long life and heavy-duty applications

TPPL

- Virtually maintenance free
- Ideal for light-to-medium applications

Flooded

- Ideal for industrial / harsh environment applications

Energy Storage

EnerSys

Software

- Edge computing, efficient data collection to the cloud
- Asset management software
- App support to manage health of assets
- Fleet management – automated service notifications
- Smart batteries

Power Electronics

- Advanced, high efficiency power conversion
- High voltage power transfer with power line communication for 5G small cells
- Wireless power transfer for automated warehouses
- Fast chargers for electric vehicles

Differentiated platforms with enhanced vertical capabilities to deliver the right solutions for our customers

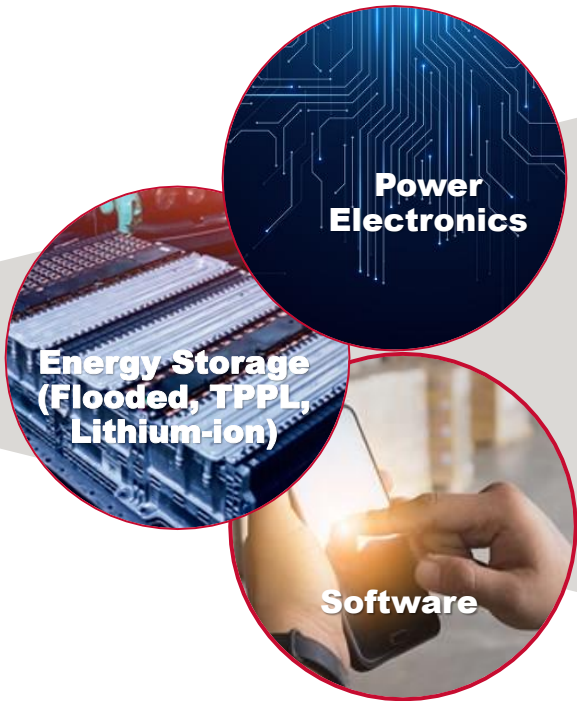
Leveraging Our Platforms Across All Segments

3 Core Technology Platforms

3 Business Segments

8 End Markets

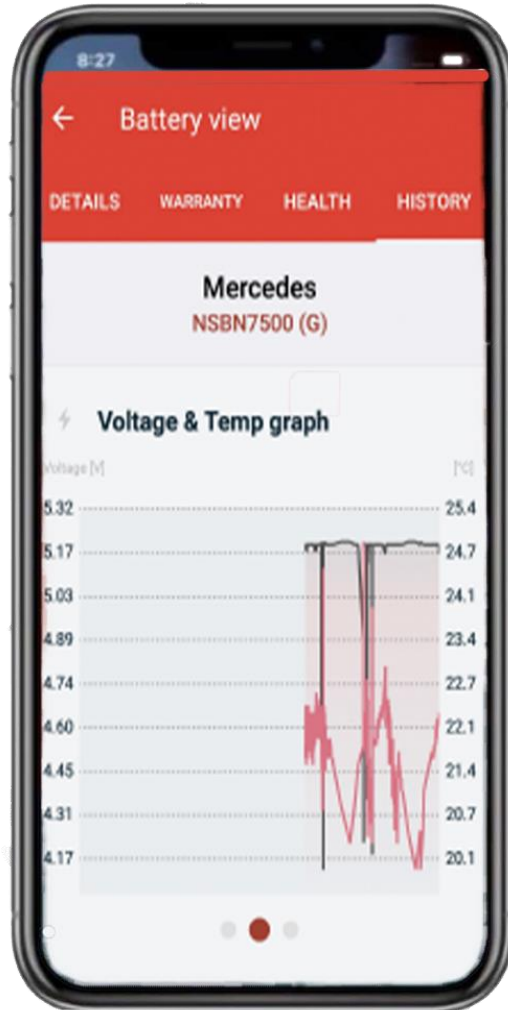
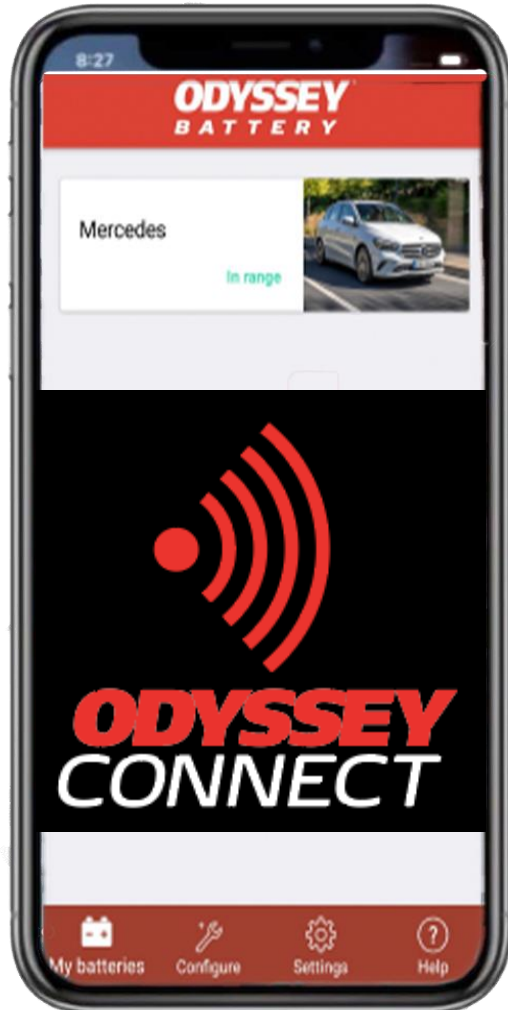
EnerSys
Premium Energy Solutions Provider



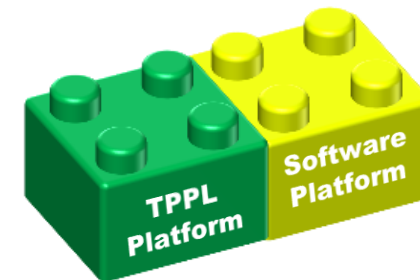
- Telecom Networks
- Broadband Cable
- Industrial Power and Utilities
- Renewable Energy
- Data Centers
- Logistics and Warehousing
- Aerospace & Defense
- Transportation

ODYSSEY CONNECT™ / ACE

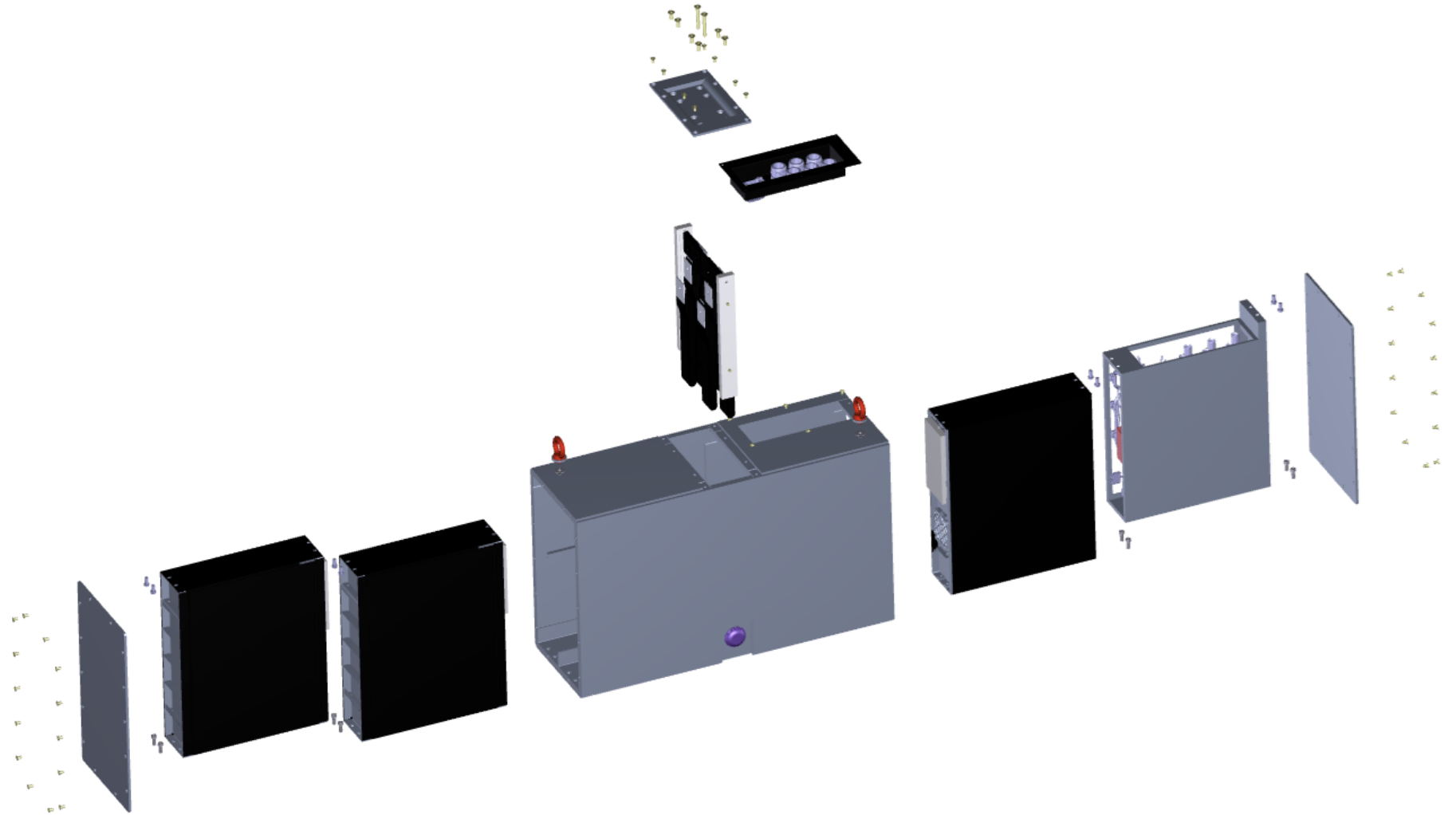
CONNECTED TPPL BATTERIES



- IoT enable TPPL
- Easy health determination
- Fleet management



Lithium Modular Architecture



Lithium Modular Architecture



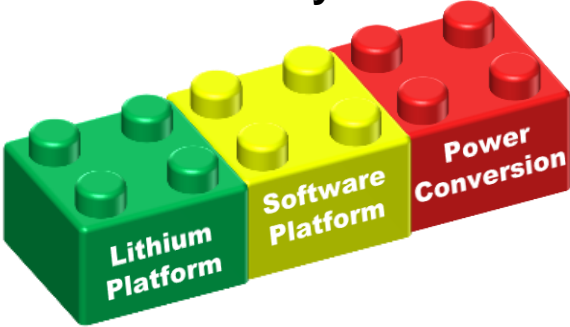
Lithium Modular Architecture



Lithium Modular Architecture



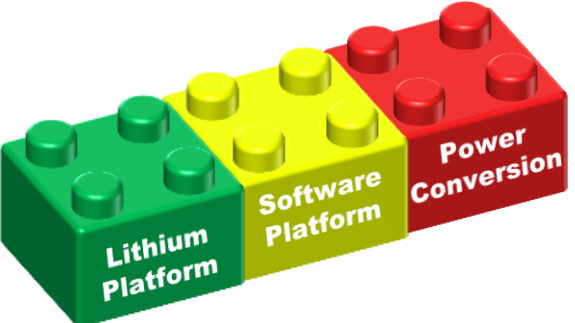
Telecom System



Uninterruptible Power Supply (UPS) Backup



Energy Storage (Behind the Meter)

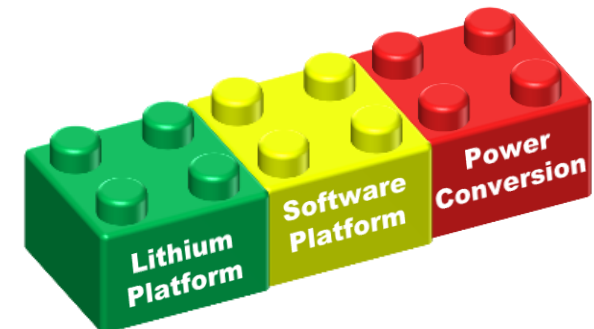


California Public Utility Commission (CPUC)

HIGH ENERGY DENSITY FOR 72-HR UNINTERRUPTED POWER



- Based on same software/hardware as Motive Power
- Same lithium cell technology and format
- Execution from design to production ~14 months



Wireless Charger

AGV application

Input : 3 phases 360-520Vac 50/60Hz

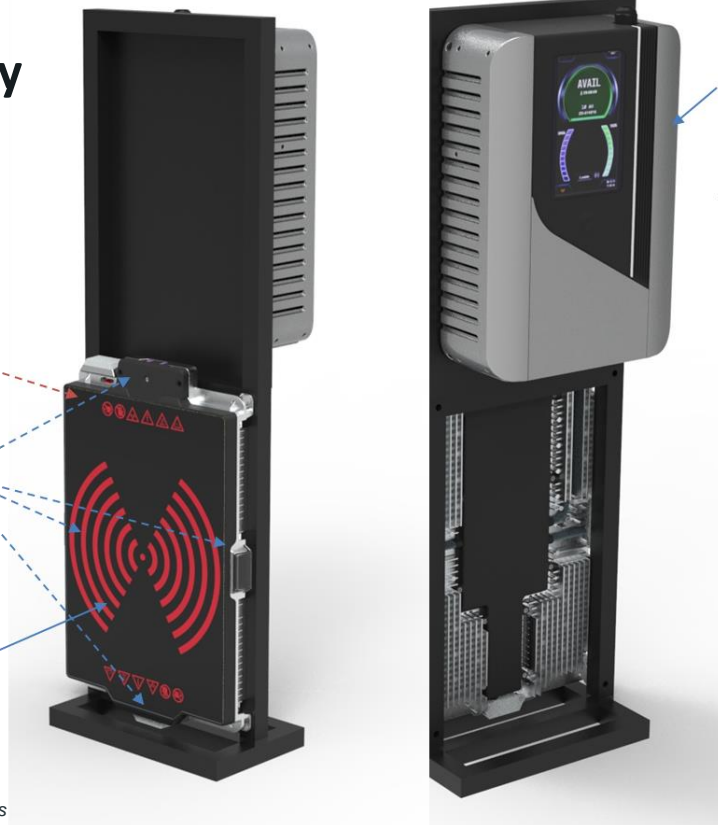
Battery : 24-36-48-72-80 Vdc

Power : 7kW & 10 kW (Peak Efficiency 93%)

UL2750

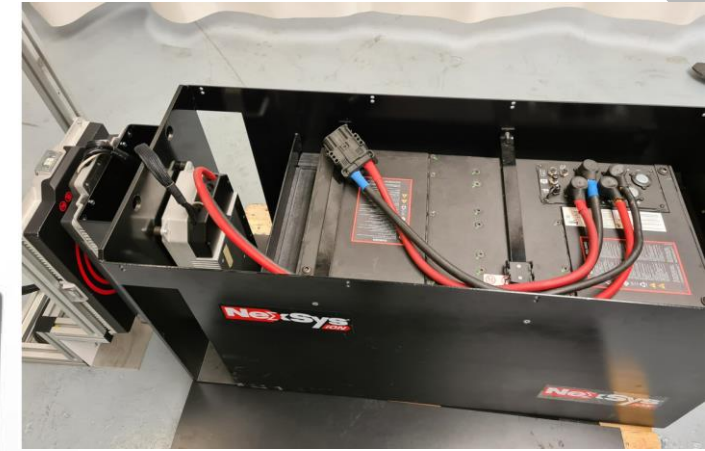
EN61980

IOT Ready



Primary Converter

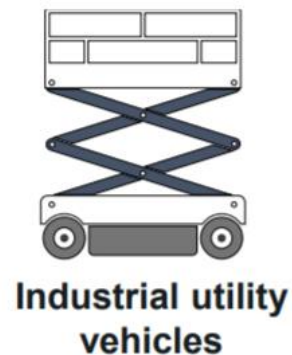
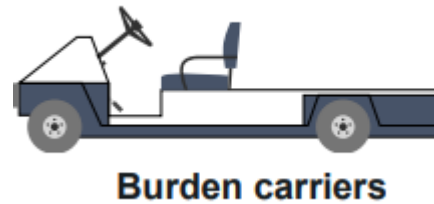
Linux Embedded
7" display
Touch screen



EnerSys Experience

BATTERIES + CHARGERS + MOTIVE EXPERIENCE

Experience in delivering Intelligent DC Charging



Motive Power (Battery + DC Charger)

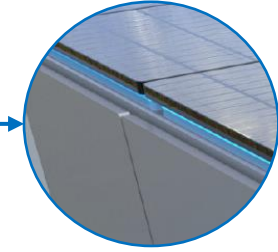
- 32% global market share
- 50% + North America market share
- Installed base of over 1,200,000 motive DC Chargers (3.5kW to 56kW) globally.
- This account for ~10GWh of annual charging

Fast Charge and Storage (FC&S)

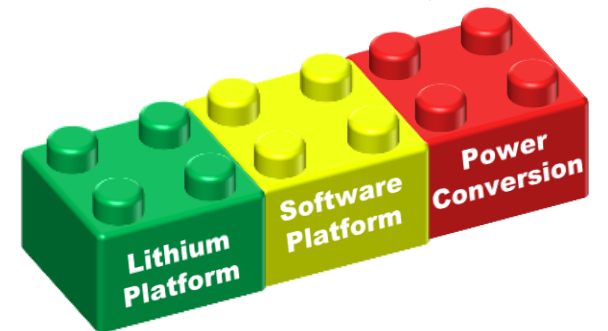
DCFC INSTALLATION

Solar panels on the rooftop

BESS Cube
(Battery Energy Storage System)

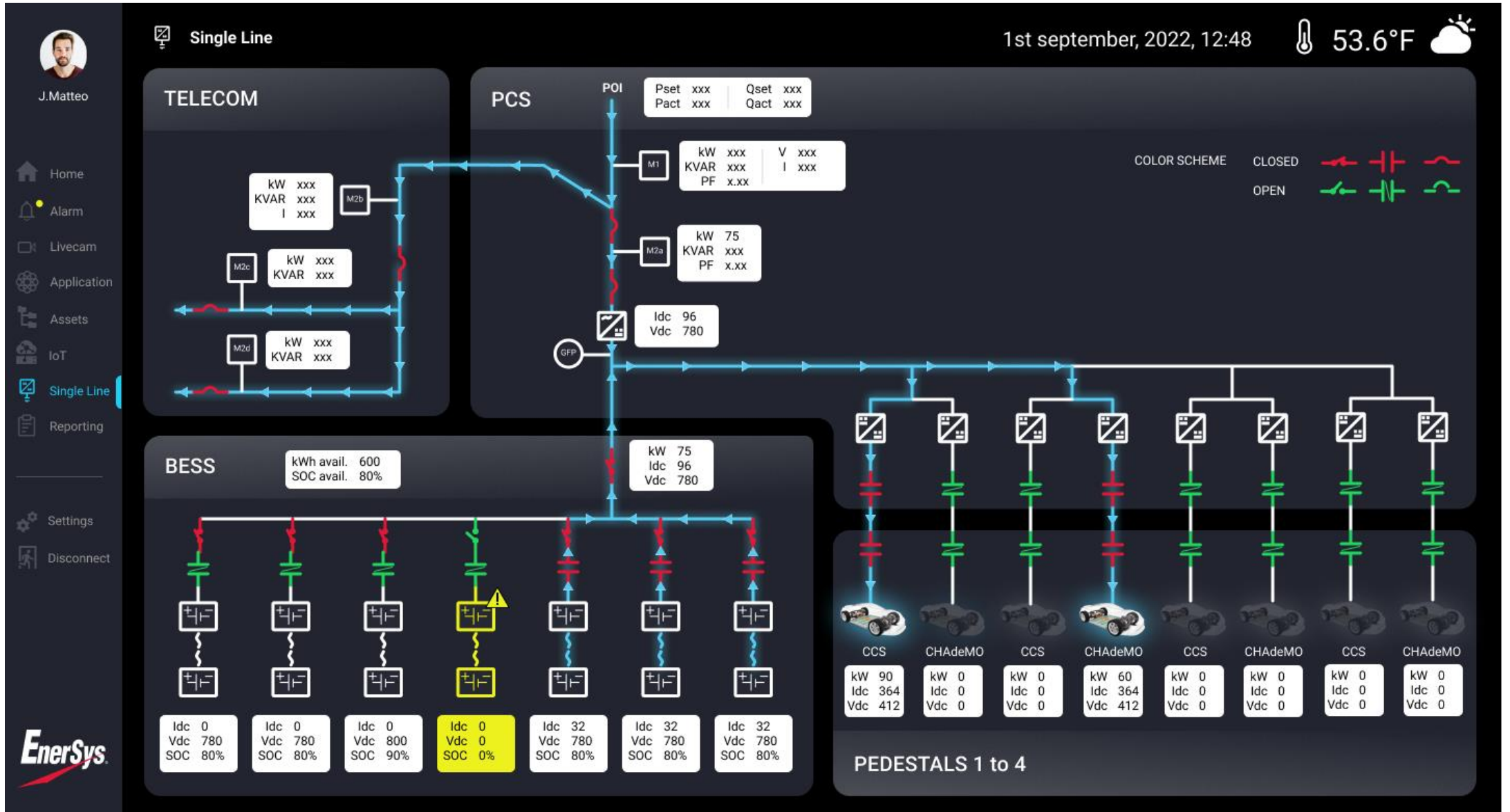


PCS Cube
(Power Conversion System)



Pedestals
(Chargers)

Cloud Based Asset Management





Thank you.

For more information visit
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