



Tech Talk – Lithium Strategy and Energy Systems

DECEMBER 13, 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 November 9, 2022, which is located on our website at www.enersys.com.

Speaker Introduction



JOERN TINNEMEYER

SVP & Chief Technology Officer

Joined EnerSys in August 2016

Responsible for global engineering, global quality, and technology development.

Primary focus of expertise includes energy storage systems, system design optimization, safety topologies and control theory.



DREW ZOGBY

President
Energy Systems Global

Joined EnerSys upon completion of the acquisition of Alpha Technologies in December 2018.

Served as Alpha Technology's President since 2008 and brings over 30 years of experience in global broadband, telecommunications and renewable energy industries.



GRANT CLARK

VP of Marketing & Product Management
Energy Systems Global

Joined EnerSys upon completion of the acquisition of Alpha Technologies in December 2018.

Over three decades in the electrical and electronic manufacturing industry, with focus on building strong cross-functional teams in business development, marketing and customer service.

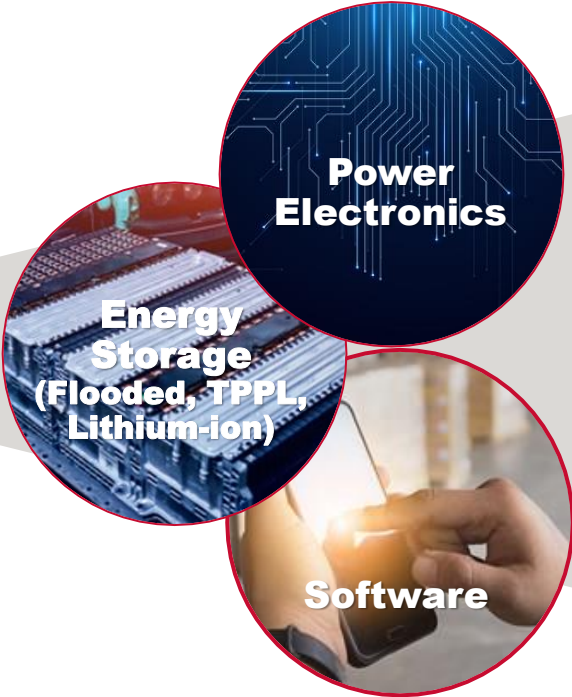
Leveraging Our Platforms Across All Segments

3 Core Technology Platforms

3 Business Segments

8 End Markets

EnerSys
Premium Energy Solutions Provider



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

Technology Advancements

Extended Runtime (XRT)



Specialty Batteries



Fast Charge & Storage



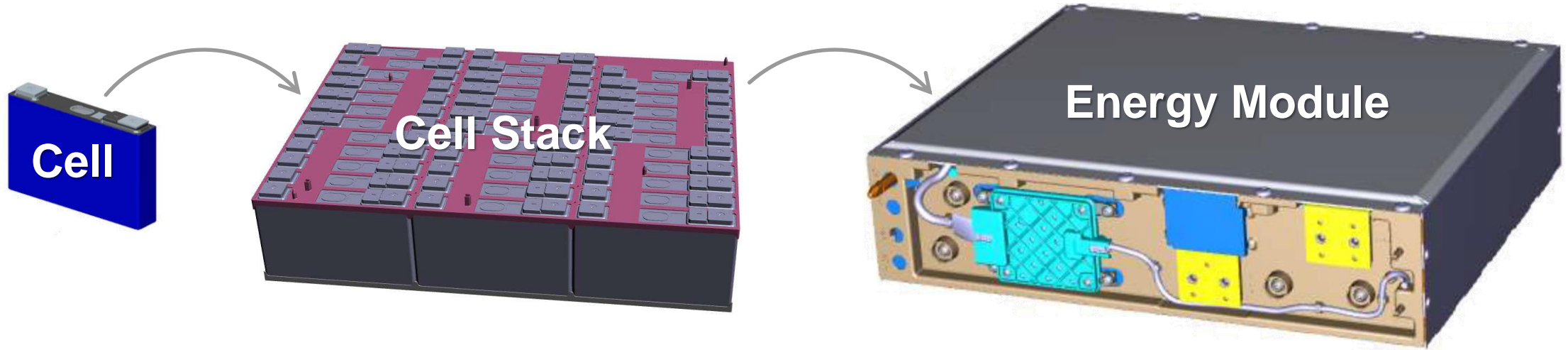
NexSys® TPPL and Li-ion Options



5G Small Cell Fault Managed



One Company – One Cell



SAFETY

Industry leader in functional safety with significant fire protection IP



QUALITY

Automotive qualified cells extensive cycle/calendar life



SCALE

Architecture used across the enterprise



PERFORMANCE

High energy density using cells designed for both power and energy



ENVIRONMENT

Use of Ni based cells allowing for recyclability

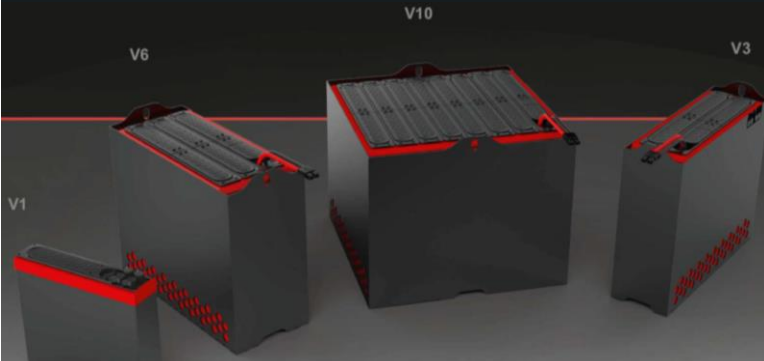


PRODUCTION

Global footprint with several manufacturing sites

Single Architecture

Motive Power



Advanced Maintenance-Free Storage

Modular Components



Energy Modules

Control Modules

DCFC

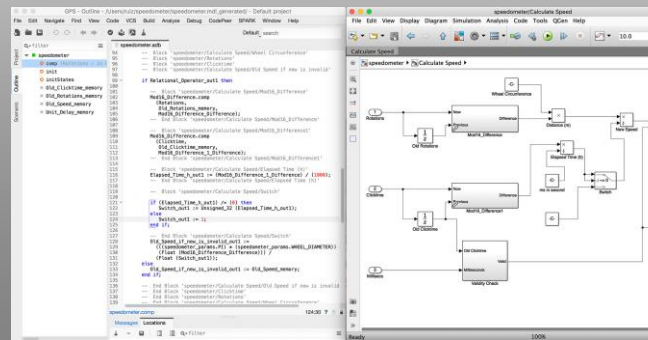


Scalable and Customizable

Telecom



Hot Swappable – High Energy Density



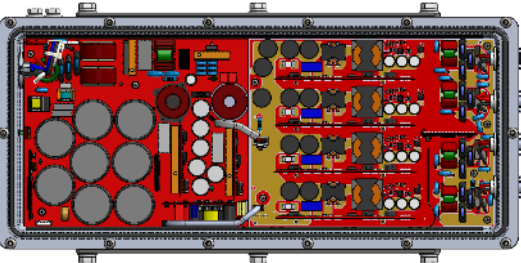
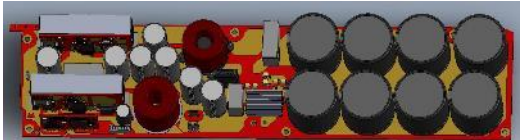
Software

Renewables



Home Energy Storage

Power Architecture



Common Topology



Common Blocks (SoM)



Power Modules



System Stack



EFFICIENCY

New designs incorporating SiC technology



SPEED

Common blocks allow for faster time to market



CONNECTED

Using a common IoT block, new designs connected to cloud



SCALE

Component and architecture migration across enterprise



QUALITY

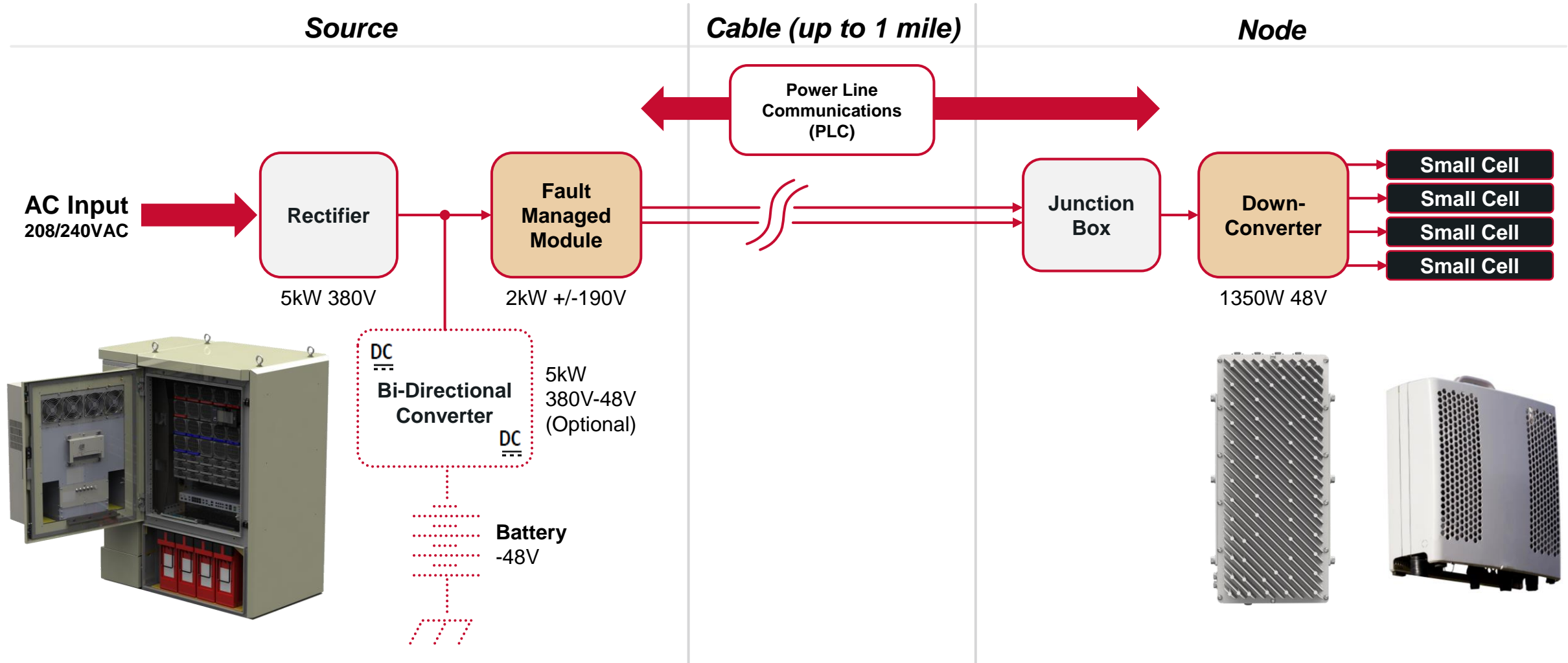
+20 years of industrial electronics experience



OPTIMIZATION

Full stack code developed inhouse for maximized functionality

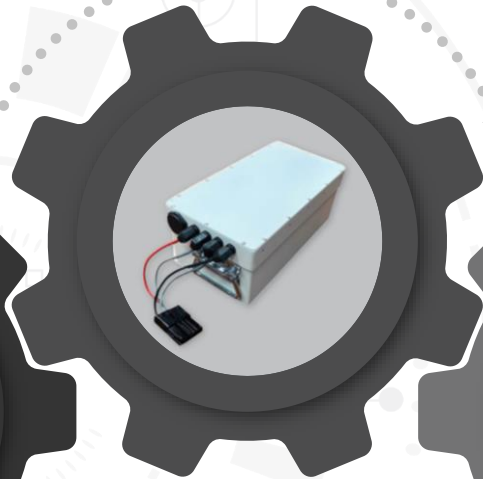
Fault Managed Technology System Architecture Point2Point





BATTERIES

SERVICES



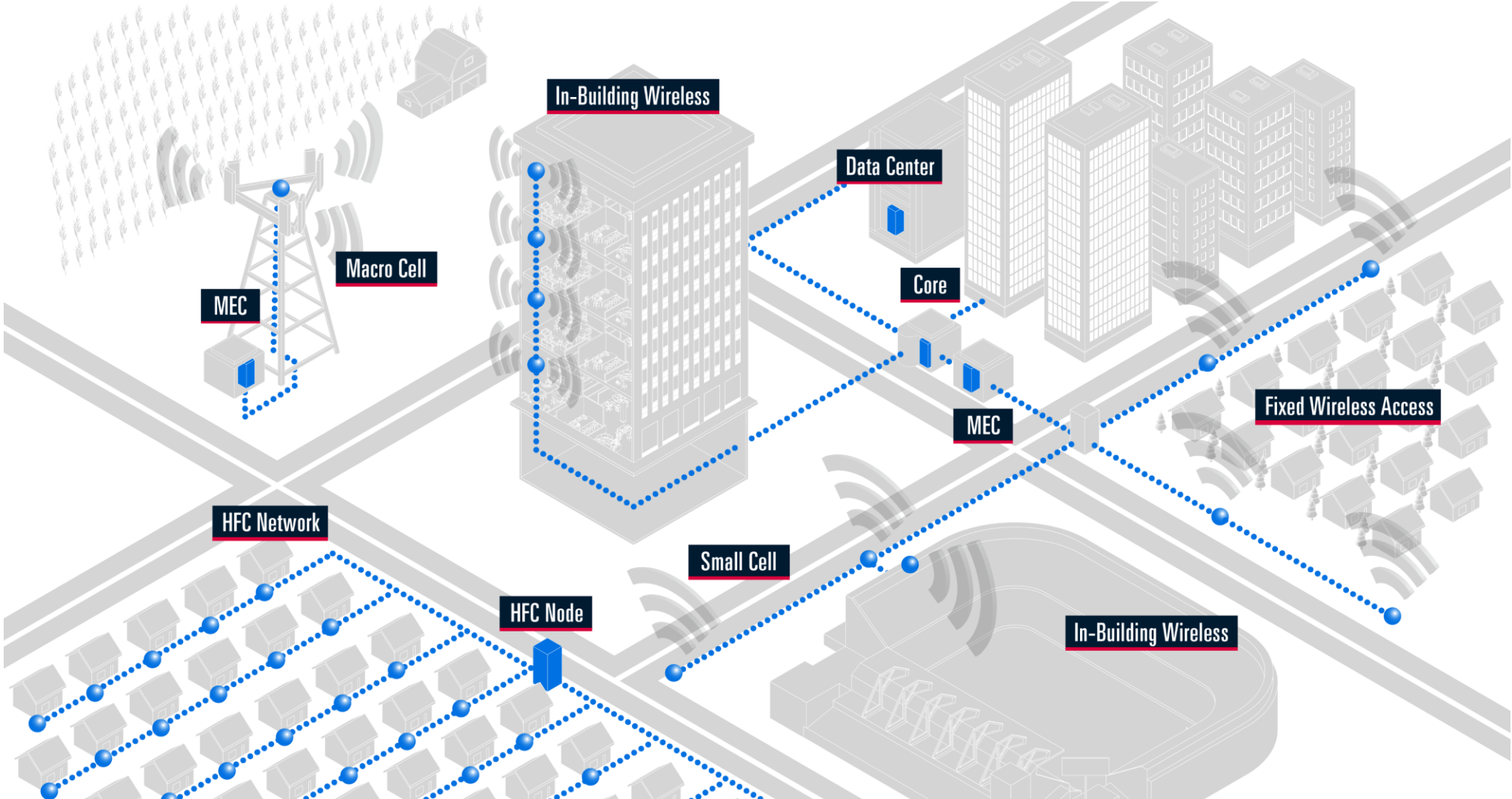
POWER

ENCLOSURES

SOFTWARE

EnerSys® Touch Points

POWER SYSTEMS FOR DATA CENTERS, TELECOM AND CABLE BROADBAND



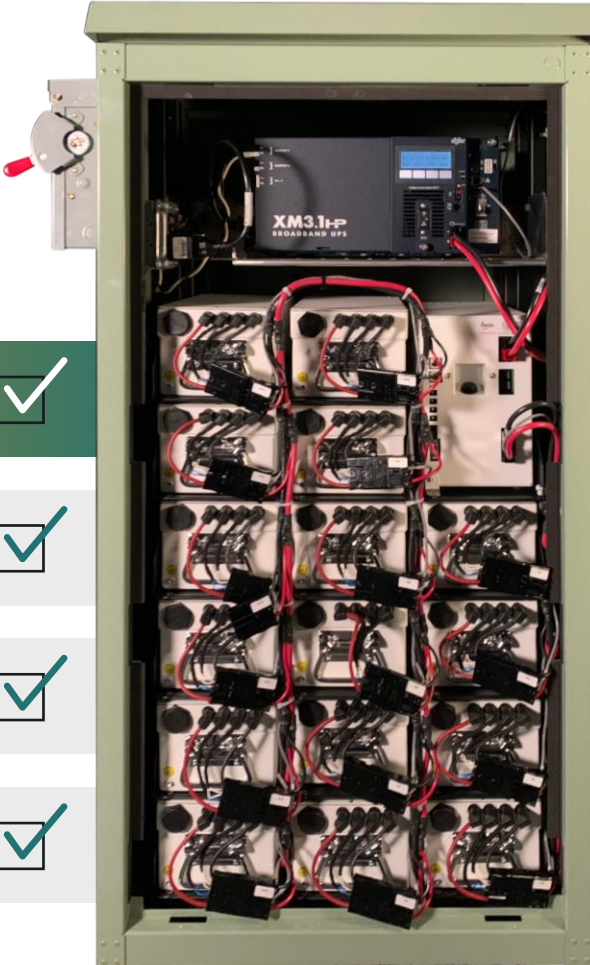
Extended Runtime (XRT) System

FOR CPUC PROJECT: LEAD / LITHIUM

TPPL Solution



Lithium Solution



<input checked="" type="checkbox"/> Lead-Acid Batteries	<input checked="" type="checkbox"/> Lithium-ion Batteries
<input checked="" type="checkbox"/> Power Supply	<input checked="" type="checkbox"/> Power Supply
<input checked="" type="checkbox"/> Software / Monitoring	<input checked="" type="checkbox"/> Software / Monitoring
<input checked="" type="checkbox"/> Cabinet	<input checked="" type="checkbox"/> Cabinet

Extended Runtime (XRT) System

FOR CPUC PROJECT: INSTALLATIONS





Q&A



Appendix

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

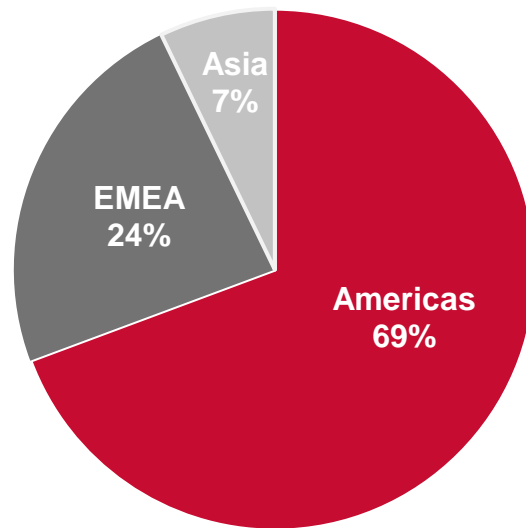
10k+¹

Customers

22%¹

Market Share²

FY'22 SALES BY GEOGRAPHY



GLOBAL FACILITY BASE³



Note: See appendix for non-GAAP reconciliation.

December 2022

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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

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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

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

Energy Systems Product Portfolio

	TELECOM & WIRELESS	CABLE BROADBAND	INDUSTRIAL & UTILITIES	RENEWABLE ENERGY	DATA CENTERS / UPS
Power	 <p>Alpha® CXPS-E3 900A Power System</p>	 <p>Alpha® XM3.1-HP Broadband Power Supply</p>	 <p>Alpha® ACS-HP 125 Modular Switched Mode Charger</p>	 <p>Mojave™ Renewable Inverter</p>	 <p>Alpha® Z-PDU Zero RU 48VDC Power Distribution Unit</p>
Batteries	 <p>PowerSafe® SBS 190F 12V TPPL Batteries</p>	 <p>AlphaCell® HP Battery</p>	 <p>PowerSafe® SBS XL 2V TPPL Batteries</p>	 <p>Mojave™ Lithium Battery</p>	 <p>DataSafe® XE TPPL Batteries</p>
Enclosures	 <p>SiteFlex® Enclosure System</p>	 <p>Alpha® PWE Enclosure Family</p>	 <p>SiteFlex® Battery Cabinets</p>	 <p>Mojave™ ESS</p>	 <p>SiteFlex® Battery Cabinets</p>
Services	 <p>Construction, Installation, Preventative Maintenance</p>	 <p>Construction, Installation, PM, Monitoring Software</p>	 <p>Engineering, Provisioning, Construction, Installation</p>	 <p>OPTICS RE Monitoring Software</p>	 <p>Construction, Installation, Preventative Maintenance</p>



Thank you.

For more information visit
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