

The next frontier in mobility.

FY2018 3rd Quarter Consolidated Financial Results

February 2nd, 2018

AISIN SEIKI Co., Ltd.

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1. Consolidated Operating Results (FY2018 3rd Quarter)

FY2018 3rd Quarter Overview of Financial Results

- 1. Revenue increased compared to last year due to favorable AT and Body parts sales, and the contribution of newly consolidated Art Metal Mfg. Co., Ltd. group.**
- 2. Operating profit increased due to the increase of sales and FX trend, in spite of the rise in material price, the increase of depreciation cost and extraordinary gain from stock swap with SHIROKI Corporation last year.**
- 3. Regarding the annual forecast, revenue and profit are revised upward due to the favorable 3Q result and FX rate tendency.**

Consolidated Operating Results

(FY2018 3rd Quarter)



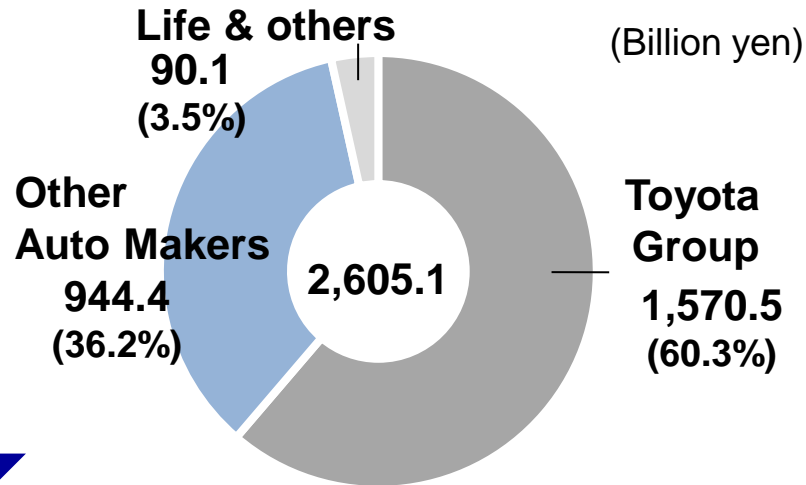
(Billion yen)	FY2017 3Q		FY2018 3Q		Change	
	Results	Rate to Revenue %	Results	Rate to Revenue %	Amount	%
Revenue	2,605.1	-	2,878.6	-	+273.5	+10.5
Operating Profit	162.2	6.2	185.6	6.4	+23.4	+14.4
Profit before income taxes	172.9	6.6	200.9	7.0	+28.0	+16.2
Profit for the period *	94.6	3.6	96.4	3.3	+1.8	+1.9
EPS	330.12 yen	-	349.26 yen	-	+19.14 yen	+5.8

Pre-conditions	FX Rate	USD 107 yen	USD 112 yen	+5 yen	+4.7
		CNY 16.0 yen	CNY 16.7 yen	+0.7 yen	+4.4
	Toyota production (10,000 Unit)	684	672	-12	-1.7
	AT sales (10,000 Unit)	635	725	+90	+14.1

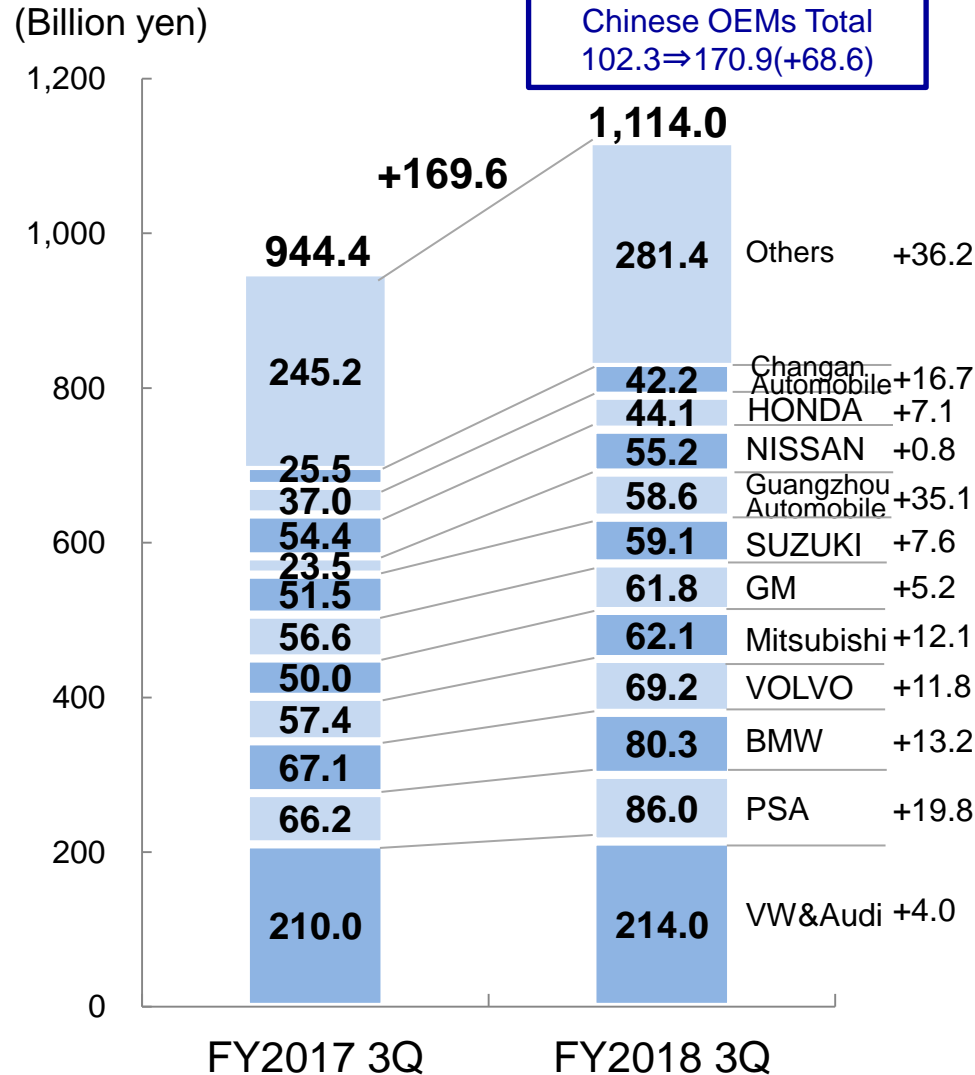
* Profit for the period attributable to Owners of the parent

Sales by Customer(FY2018 3rd Quarter)

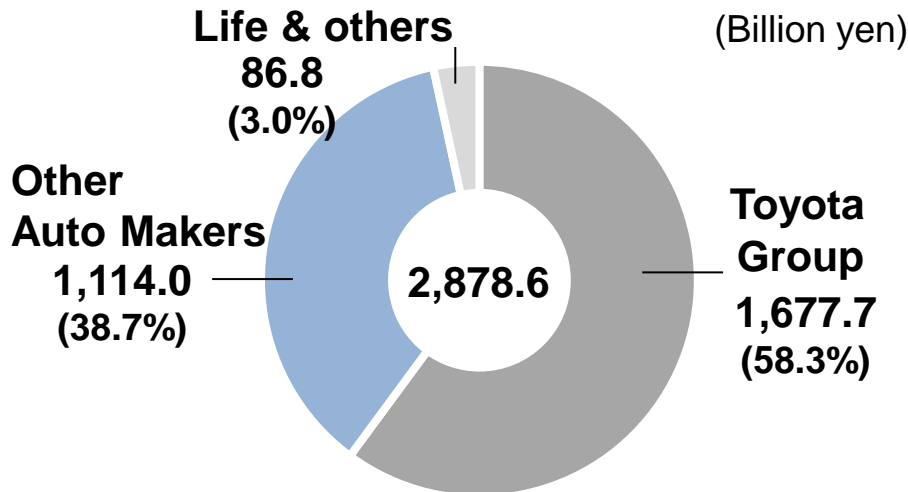
FY2017 3rd Quarter Revenue



Other Auto Makers sales breakdown

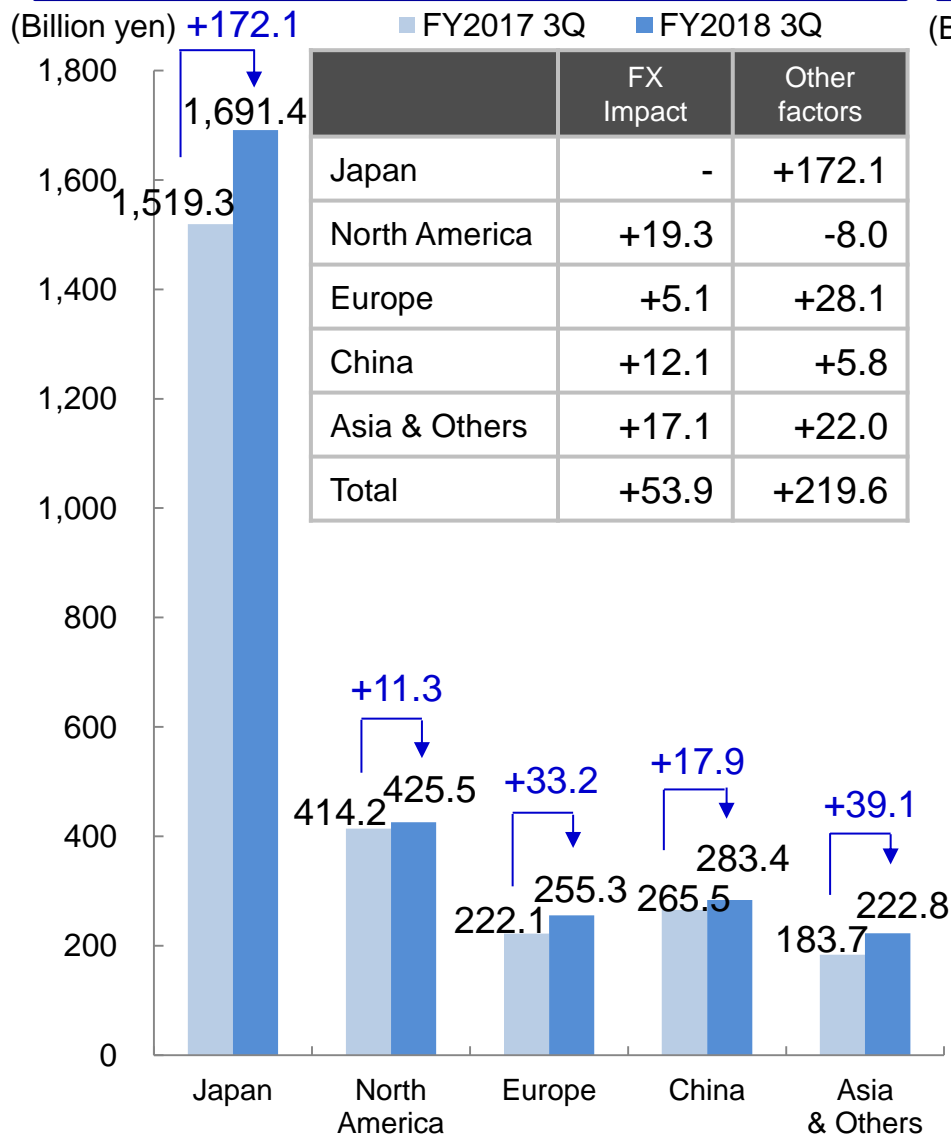


FY2018 3rd Quarter Revenue (+273.5)



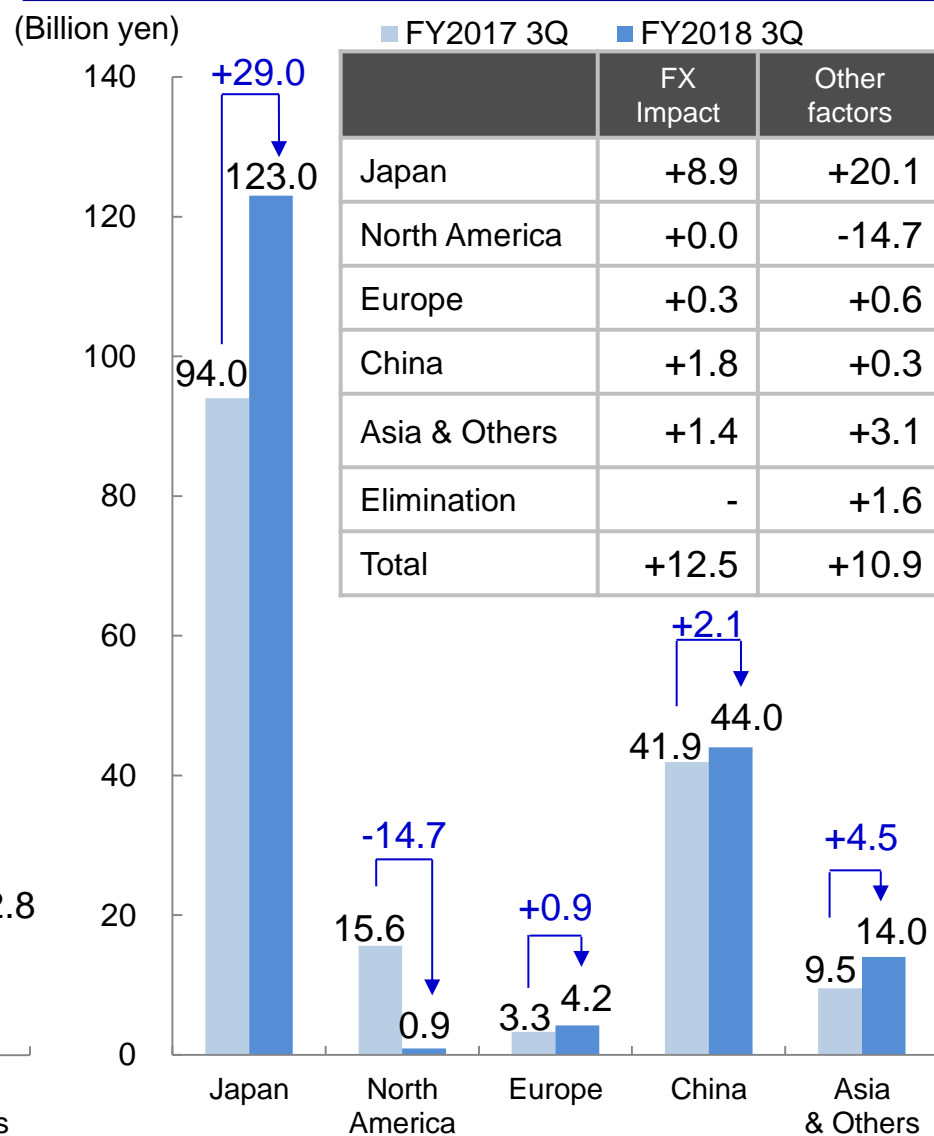
Segment Information (FY2018 3rd Quarter)

Revenue (+ 273.5)



	FY2017 3Q	FY2018 3Q	FY2018 3Q - FY2017 3Q
Japan	1,519.3	1,691.4	+172.1
North America	414.2	425.5	+11.3
Europe	222.1	255.3	+33.2
China	265.5	283.4	+17.9
Asia & Others	183.7	222.8	+39.1
Total	2,604.8	2,878.3	+273.5

Operating Profit (+ 23.4)

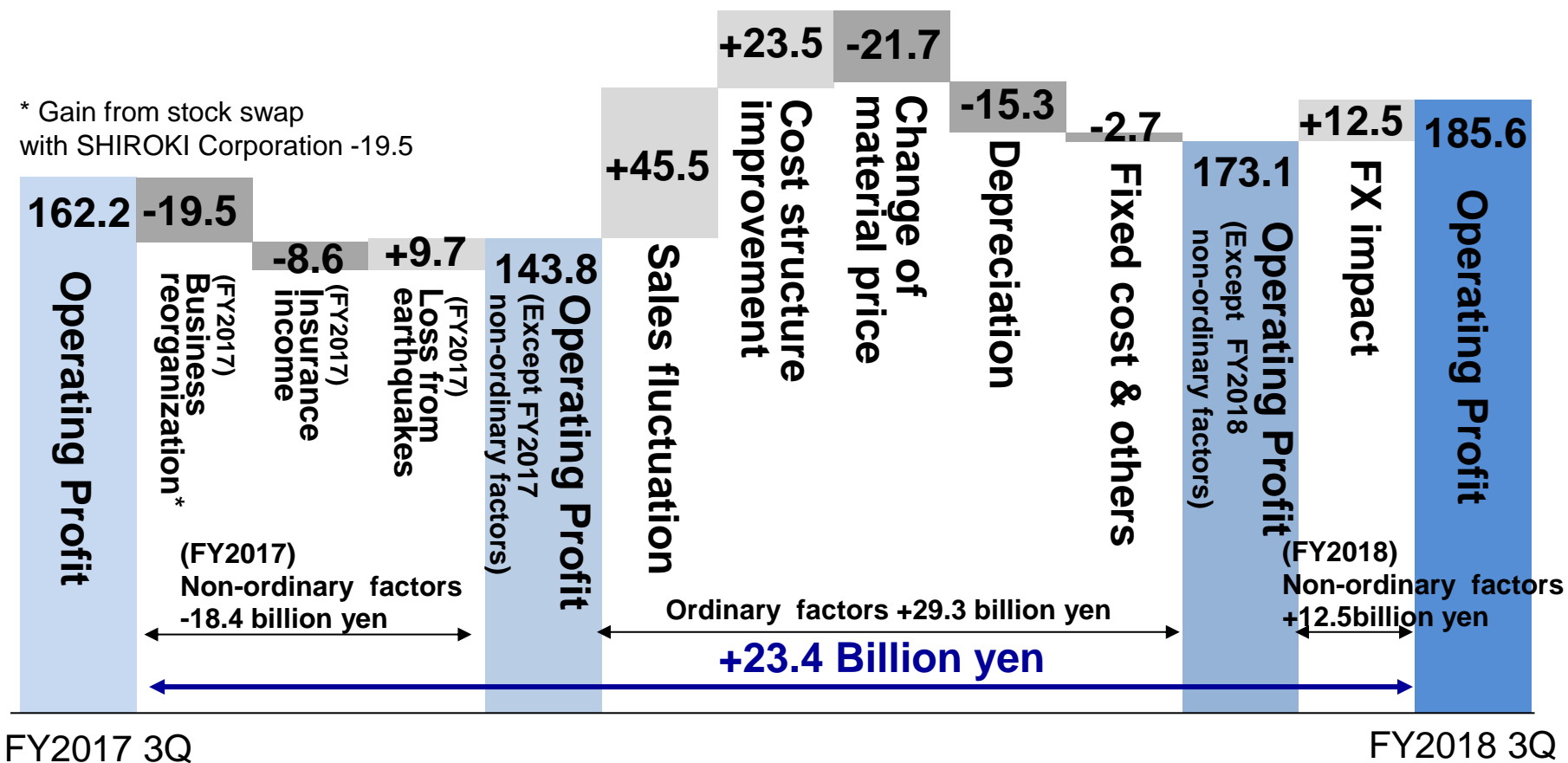


	FY2017 3Q	FY2018 3Q	FY2018 3Q - FY2017 3Q
Japan	94.0	123.0	+29.0
North America	15.6	0.9	-14.7
Europe	3.3	4.2	+0.9
China	41.9	44.0	+2.1
Asia & Others	9.5	14.0	+4.5
Elimination	-	+1.6	+1.6
Total	164.3	187.7	+23.4

Fluctuations for Operating Profit (FY2018 3rd Quarter)

FY2017 3Q / FY2018 3Q

(Billion yen)



FY2017 3Q

FY2018 3Q

2. Consolidated Operating Forecast (FY2018 - 12 months)

Consolidated Operating Forecast

(FY2018 - 12 months)



(Billion yen)	FY2017		FY2018		Change		FY2018	
	Results	Rate to Revenue %	Forecast	Rate to Revenue %	Amount	%	Disclosed forecast in October	Rate to Revenue %
Revenue	3,562.6	–	3,860.0	–	+297.4	+8.3	3,780.0	–
Operating Profit	228.6	6.4	248.0	6.4	+19.4	+8.4	242.0	6.4
Profit before income taxes	237.3	6.7	262.0	6.8	+24.7	+10.4	256.0	6.8
Profit for the period *	126.6	3.6	129.0	3.3	+2.4	+1.9	127.0	3.4
EPS	444.46 yen	–	469.40 yen	–	+24.94 yen	+5.6	459.45 yen	-

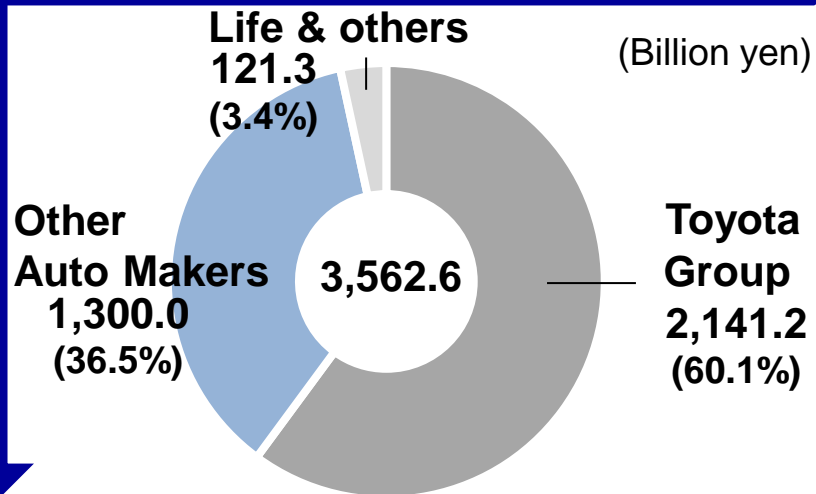
Pre-conditions	FX Rate	USD 109 yen	USD 111 yen	+2 yen	+1.8	USD 111 yen
		CNY 16.1 yen	CNY 16.7 yen	+0.6 yen	+3.7	CNY 16.6 yen
	Toyota production (10,000 Unit)	909	890	-19	-2.0	885
	AT sales (10,000 Unit)	869	980	+111	+12.7	980

* Profit for the period attributable to Owners of the parent

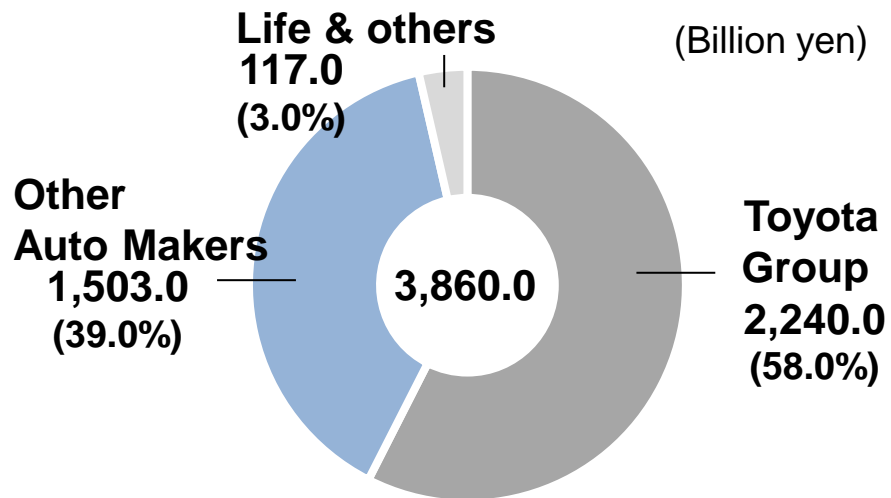
Forecast of Sales by Customer

(FY2018 - 12 months)

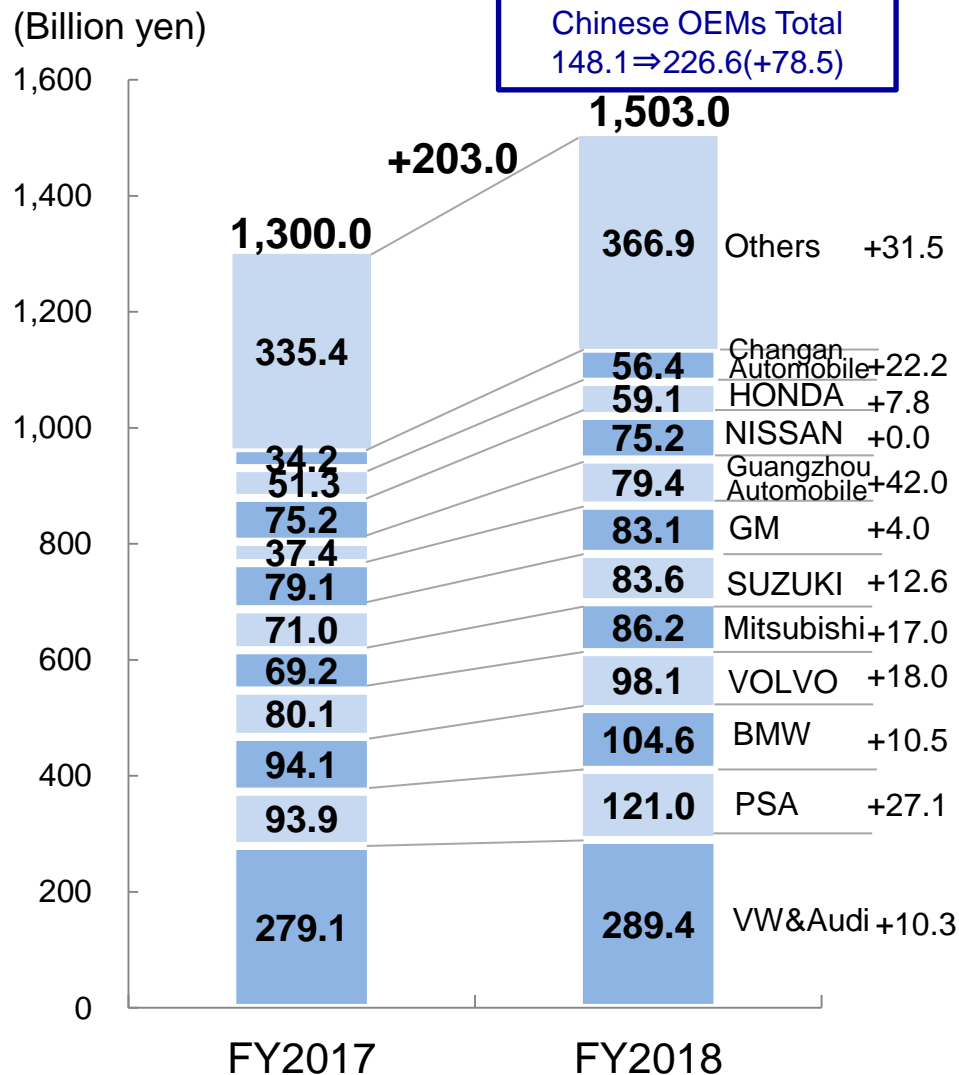
FY2017 Revenue



FY2018 Revenue (+297.4)



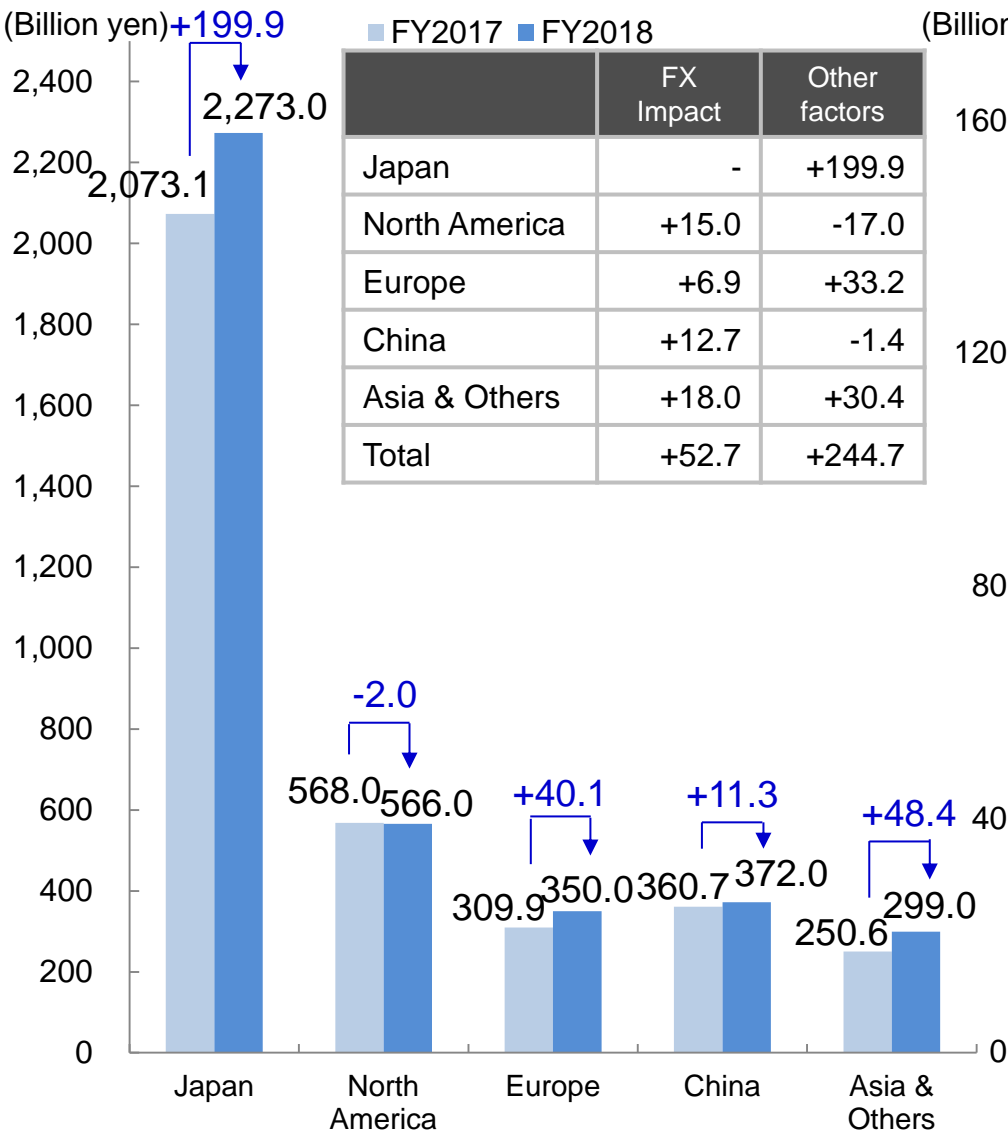
Other Auto Makers sales breakdown



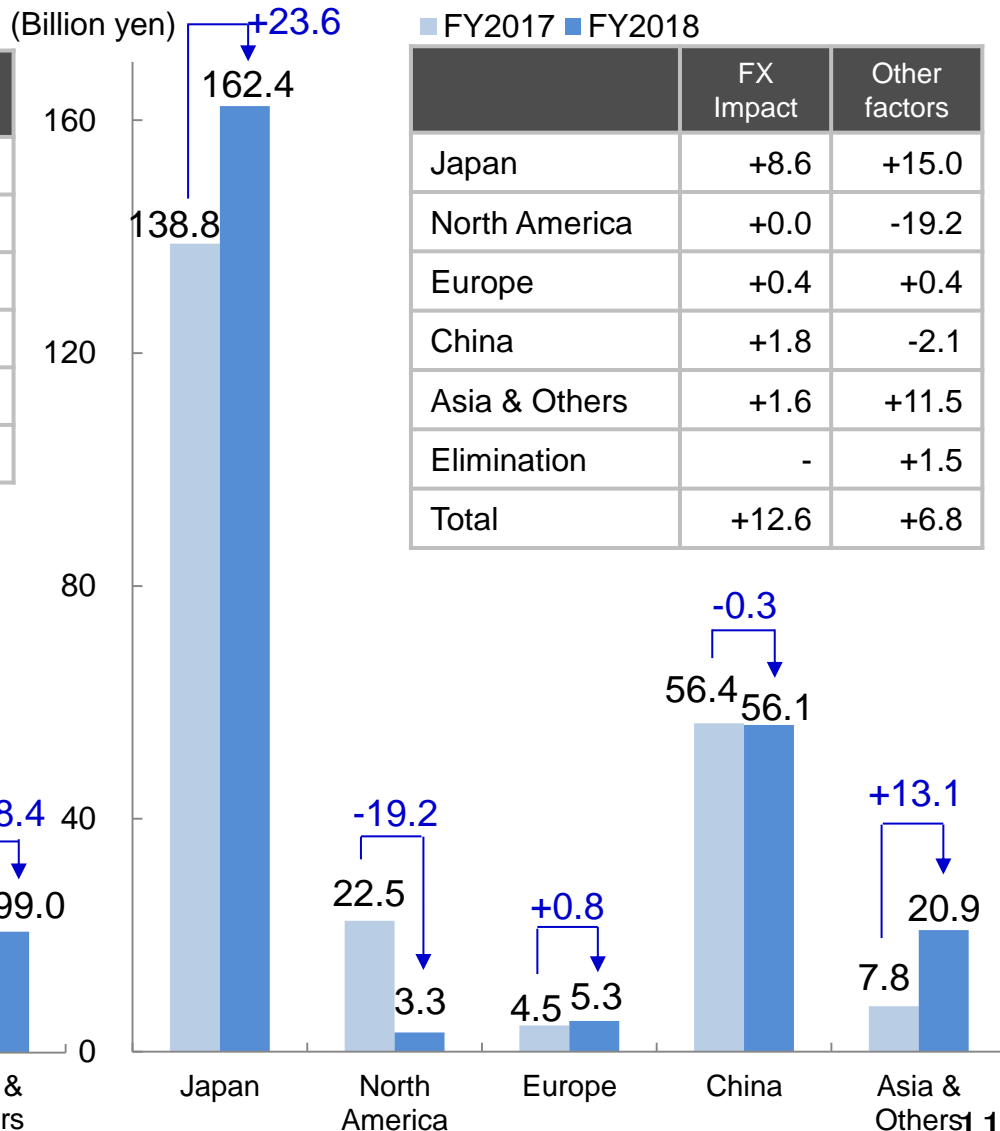
Forecast of Segment Information

(FY2018 - 12 months)

Revenue (+297.4)



Operating Profit (+ 19.4)



Forecast of Fluctuations for Operating Profit

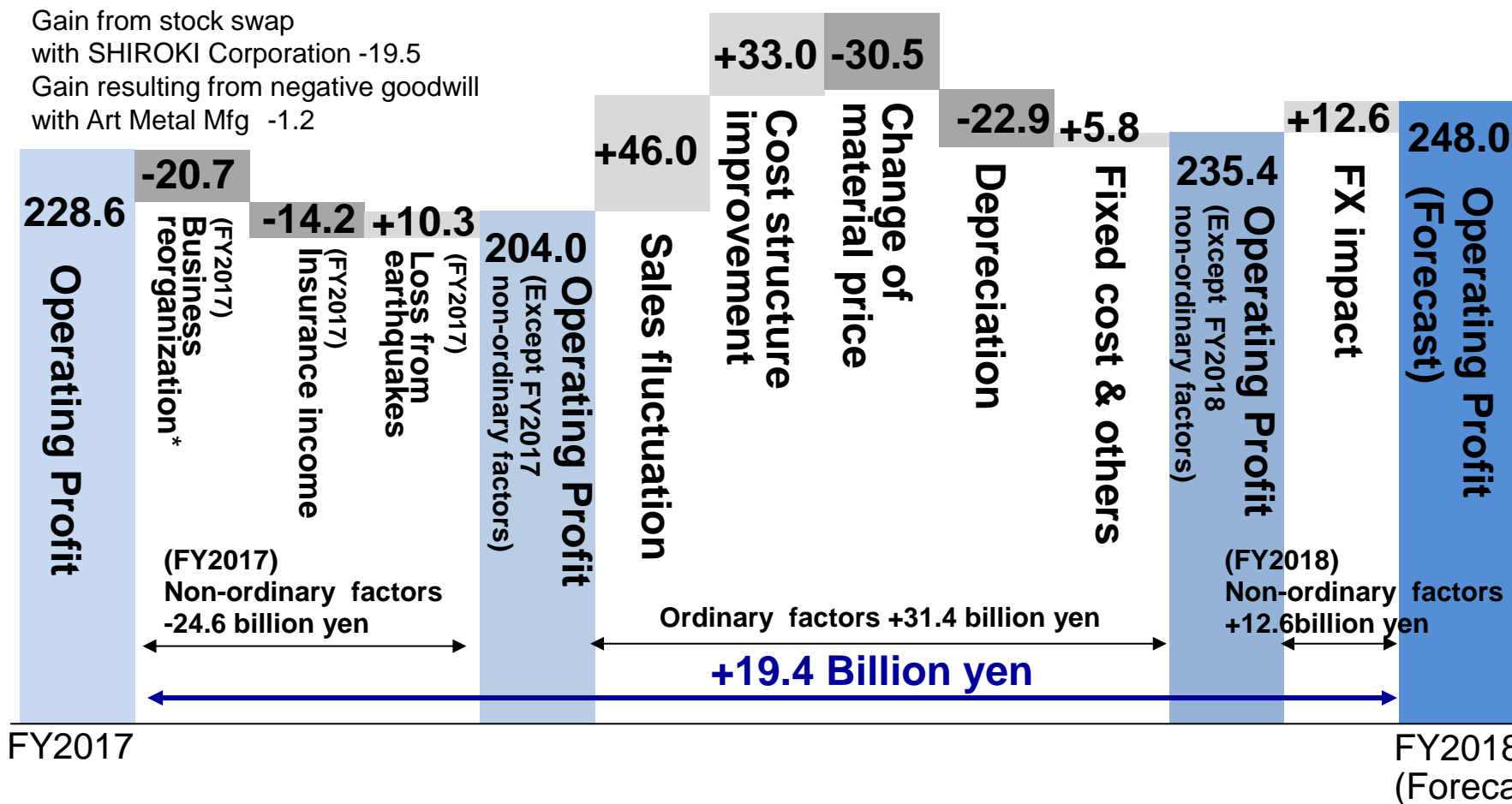
(FY2018 - 12 months)

FY2017 / FY2018 (Forecast)

(Billion yen)

*

Gain from stock swap with SHIROKI Corporation -19.5
Gain resulting from negative goodwill with Art Metal Mfg -1.2

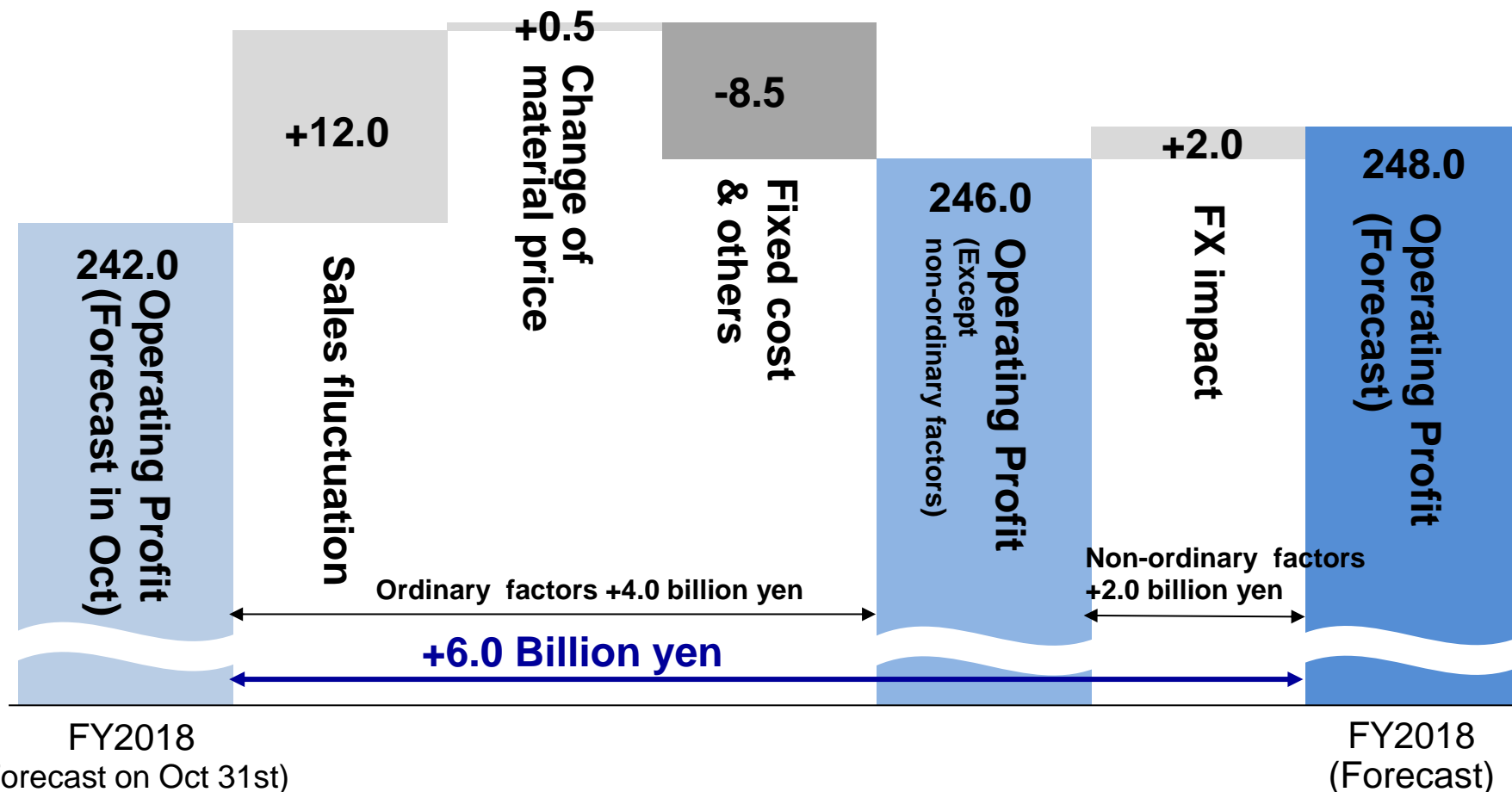


Forecast of Fluctuations for Operating Profit

(FY2018 - 12 months)

FY2018(Forecast in October)
/ FY2018 (Forecast)

(Billion yen)

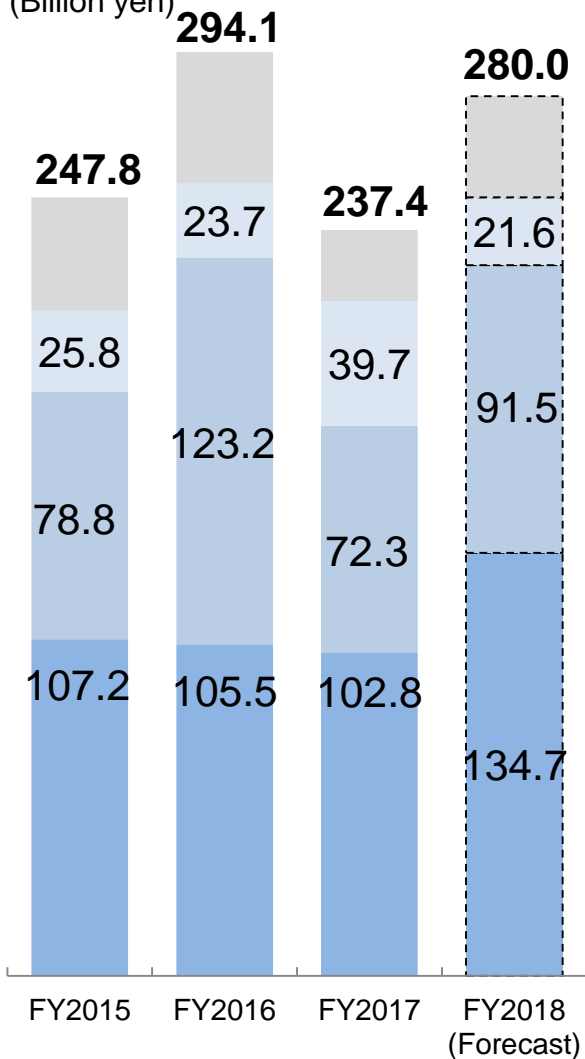


3. Reference Information

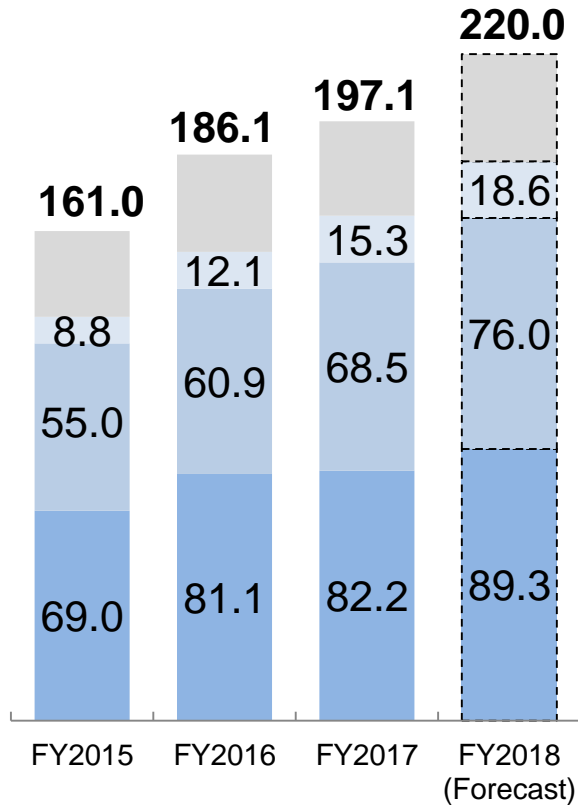
Capital Expenditure/Depreciation/ R&D Expenditure

Capital Expenditure

(Billion yen)

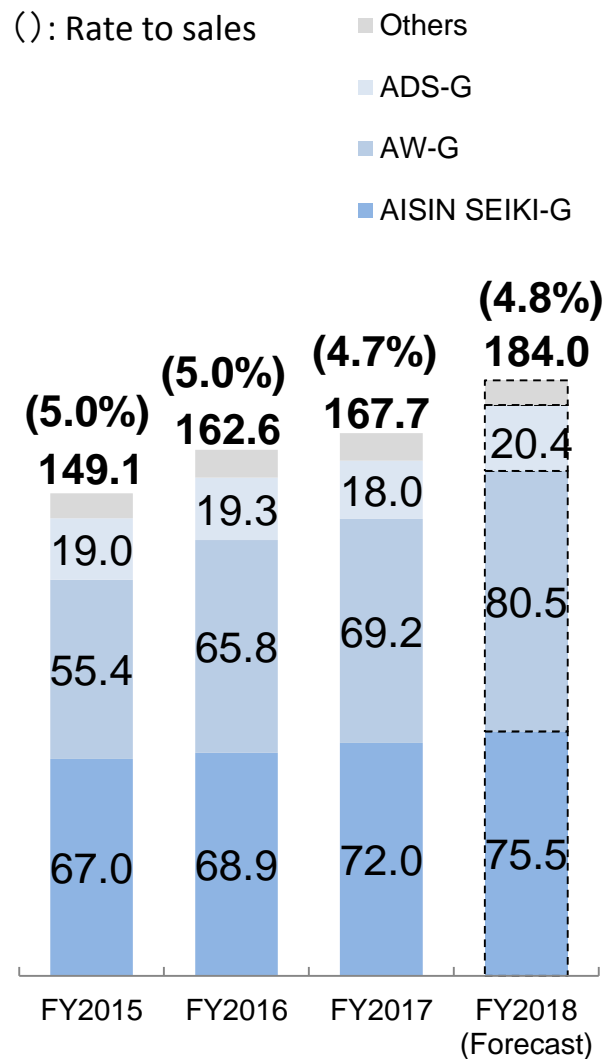


Depreciation



R&D Expenditure

(): Rate to sales



Toyota Car Production

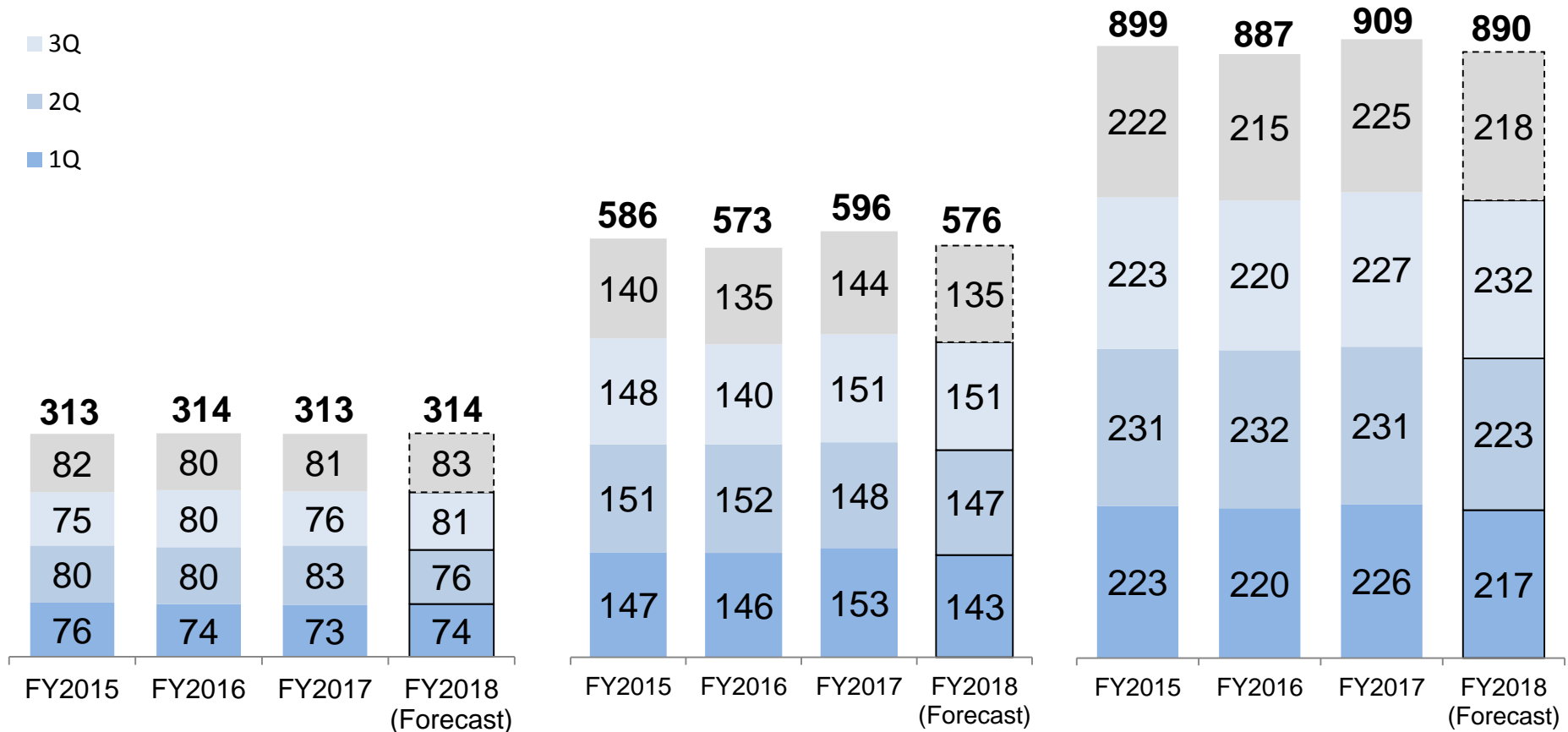
Toyota domestic production

Toyota oversea production

Toyota global production

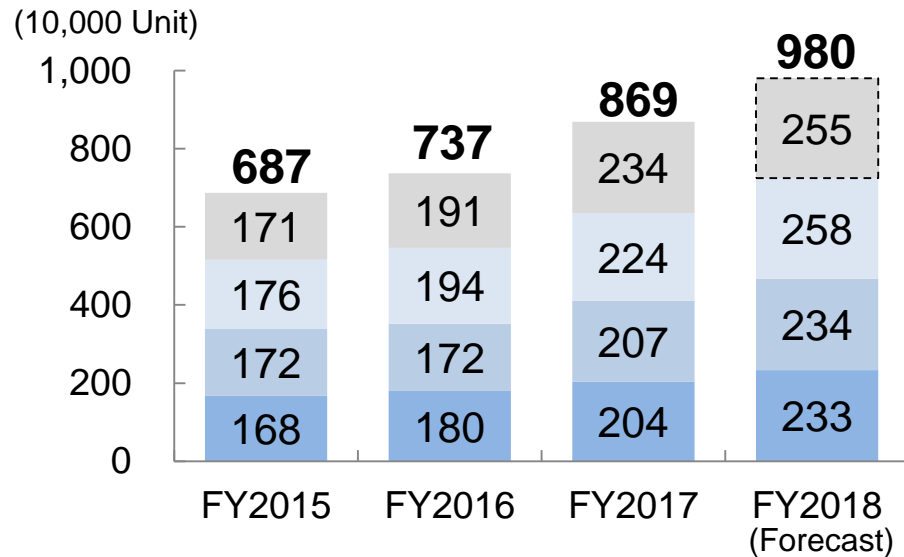
(10,000 Unit)

- 4Q
- 3Q
- 2Q
- 1Q

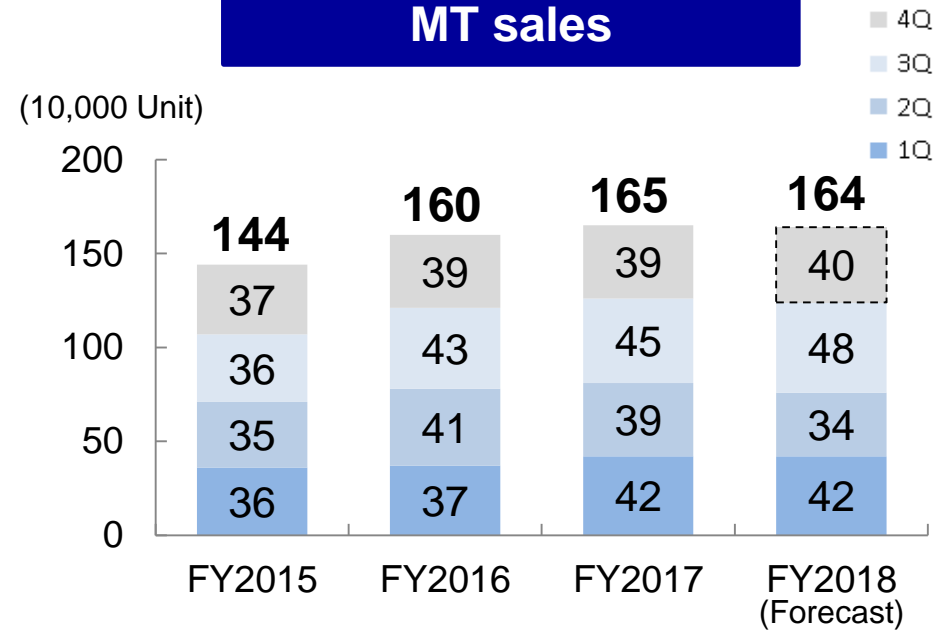


Sales Number

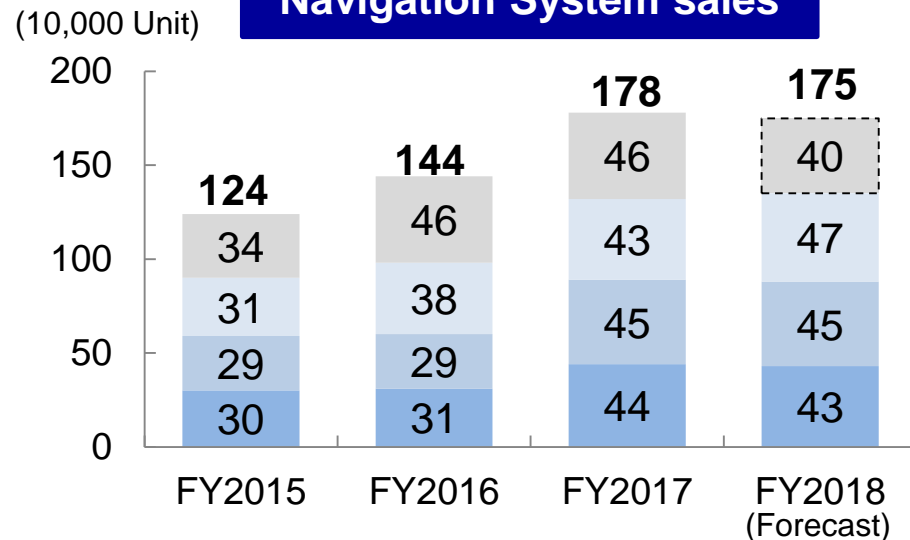
AT sales



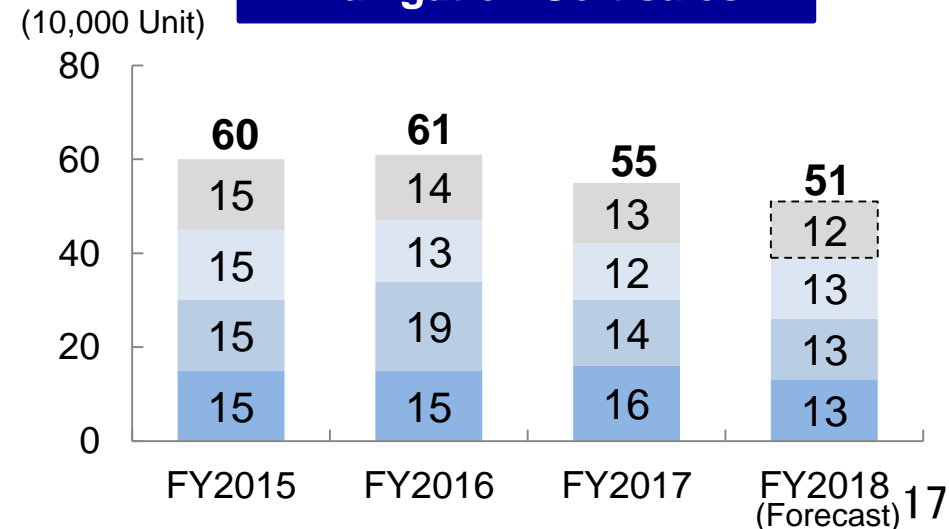
MT sales



Navigation System sales

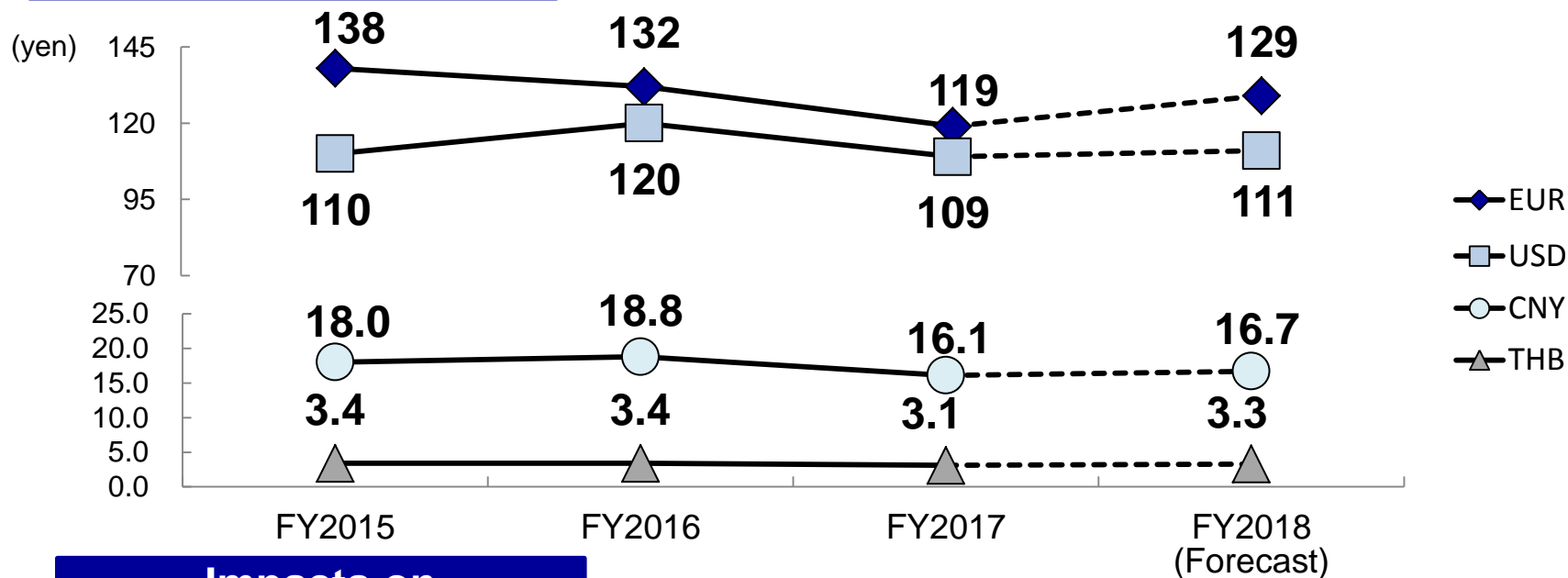


Navigation Soft sales



Foreign Currency Exchange Rate

Foreign Exchange Rate



Impacts on Operating Profit

Forex Impact on Operating profit per 1(or 0.1) yen

(Billion yen)

	FY2015	FY2016	FY2017	FY2018(Forecast)		Rate after January
USD	1.46	1.27	1.34	1.11	USD	110
EUR	0.14	0.13	0.17	0.19	EUR	130
THB *	0.74	0.80	0.81	1.25	THB	3.3
CNY *	0.26	0.54	0.79	0.80	CNY	16.7

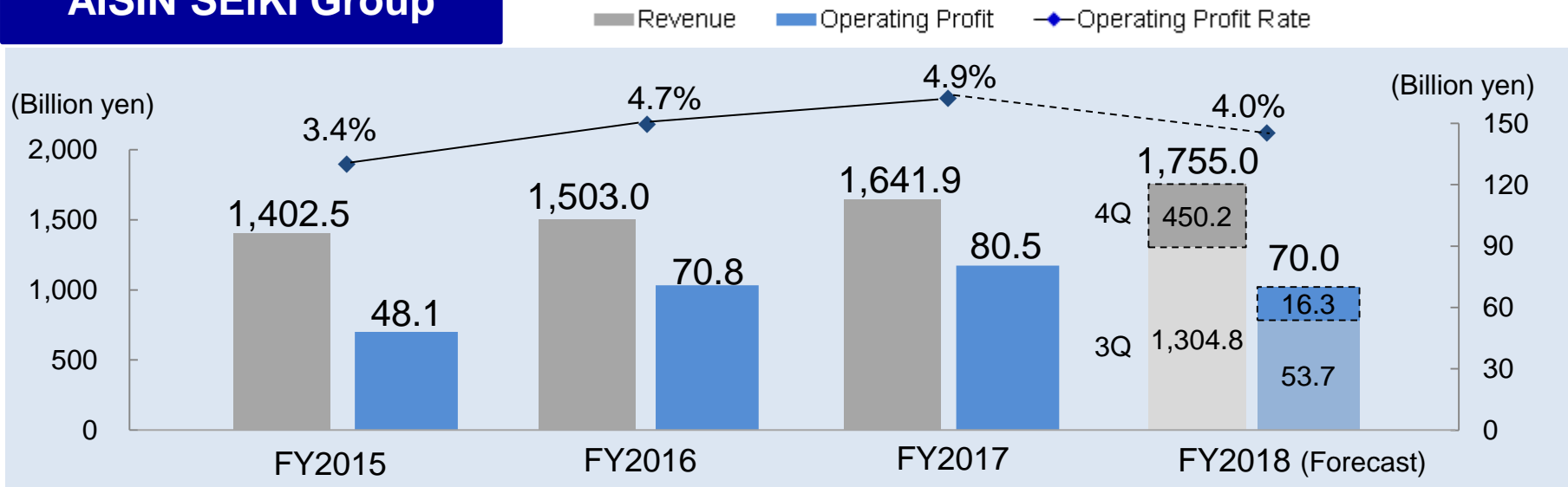
* Impacts of THB and CNY are per 0.1yen.

Financial Results of the Main Consolidated Companies I

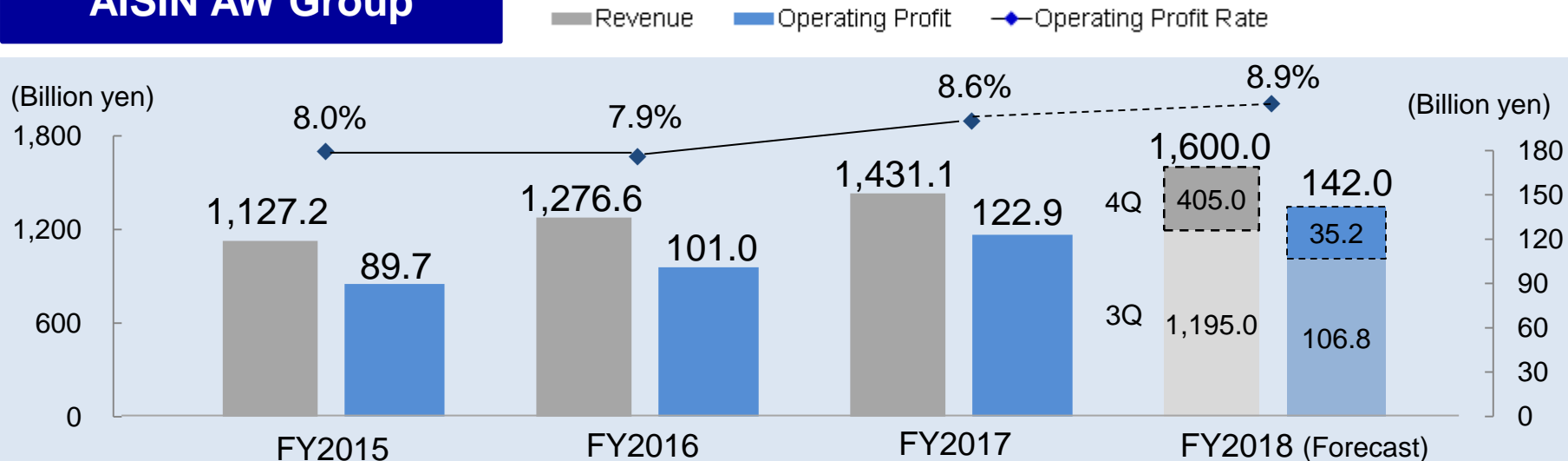
* The results of FY2015 are based on JGAAP and the others are based on IFRS.



AISIN SEIKI Group



AISIN AW Group

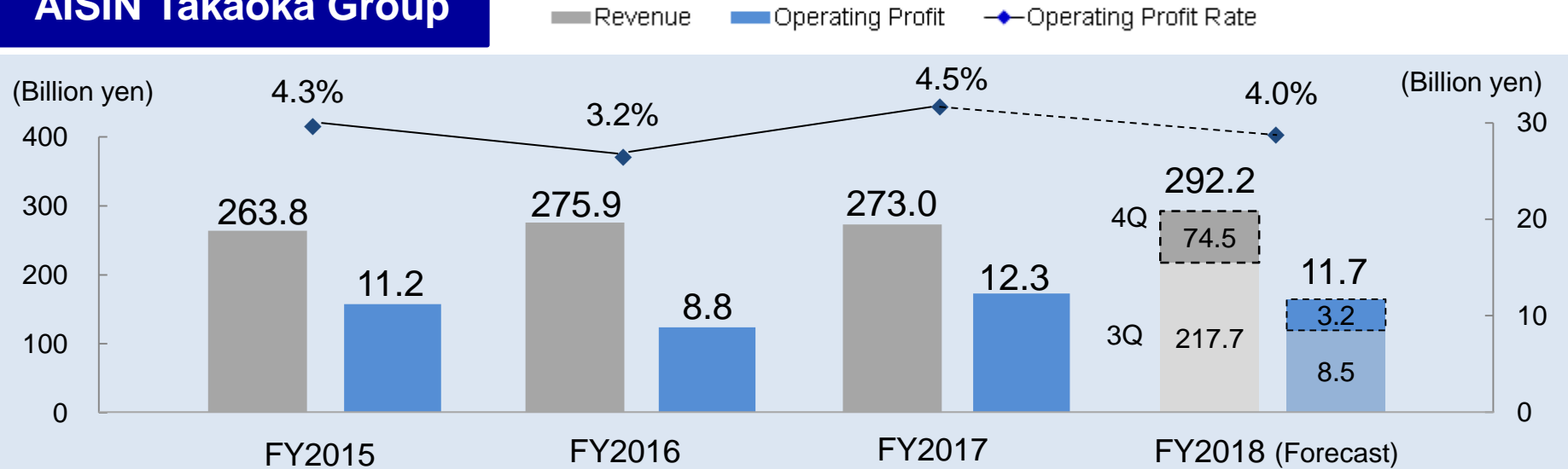


Financial Results of the Main Consolidated Companies II

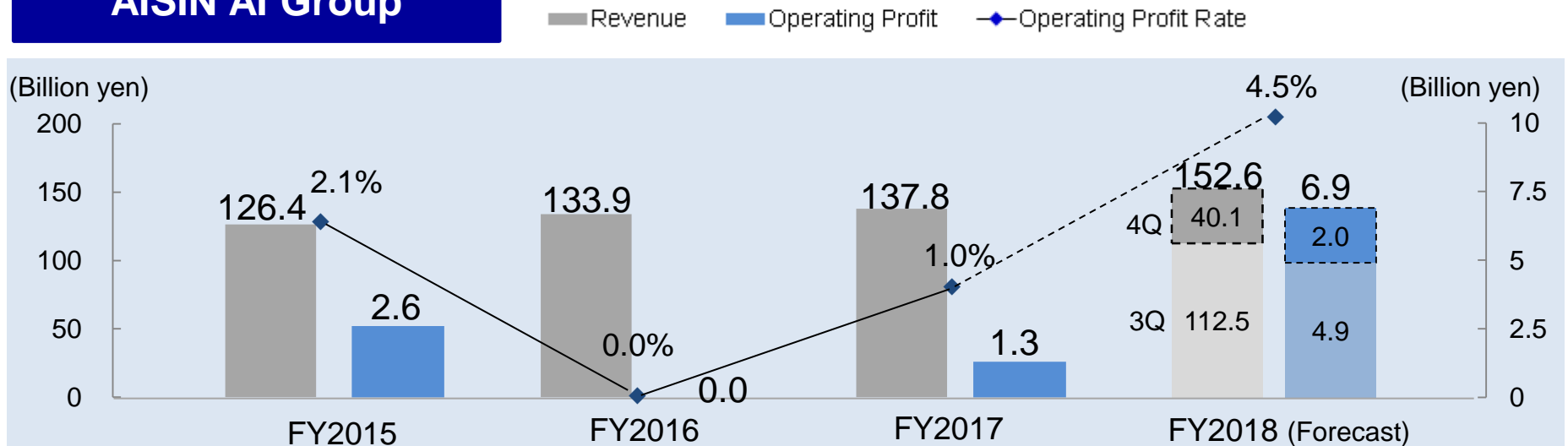
* The results of FY2015 are based on JGAAP and the others are based on IFRS.



AISIN Takaoka Group



AISIN AI Group



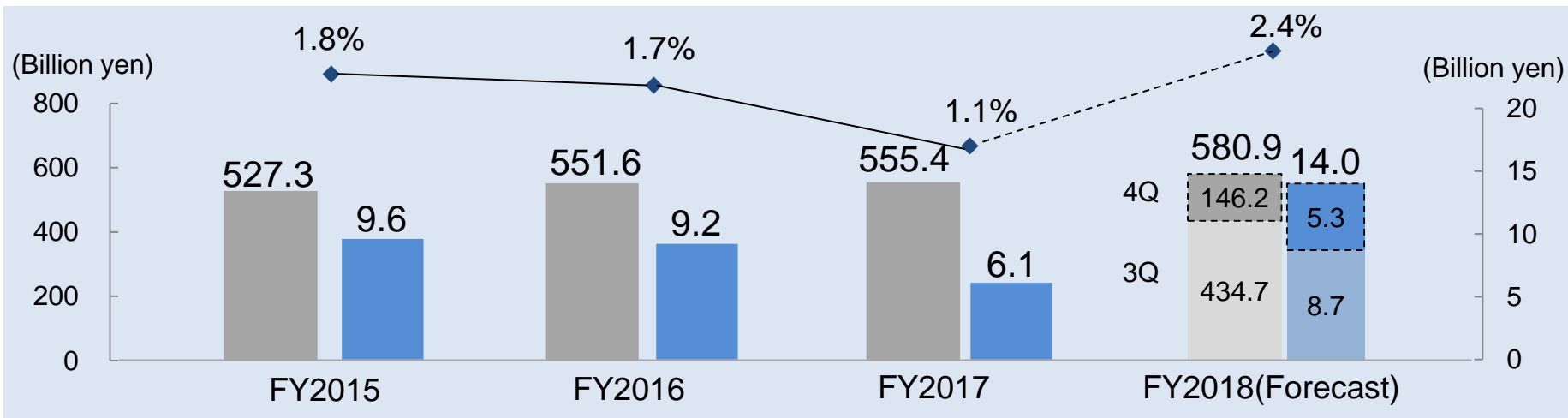
Financial Results of the Main Consolidated Companies III

* The results of FY2015 are based on JGAAP and the others are based on IFRS.



ADVICS Group

■ Revenue ■ Operating Profit ◆ Operating Profit Rate



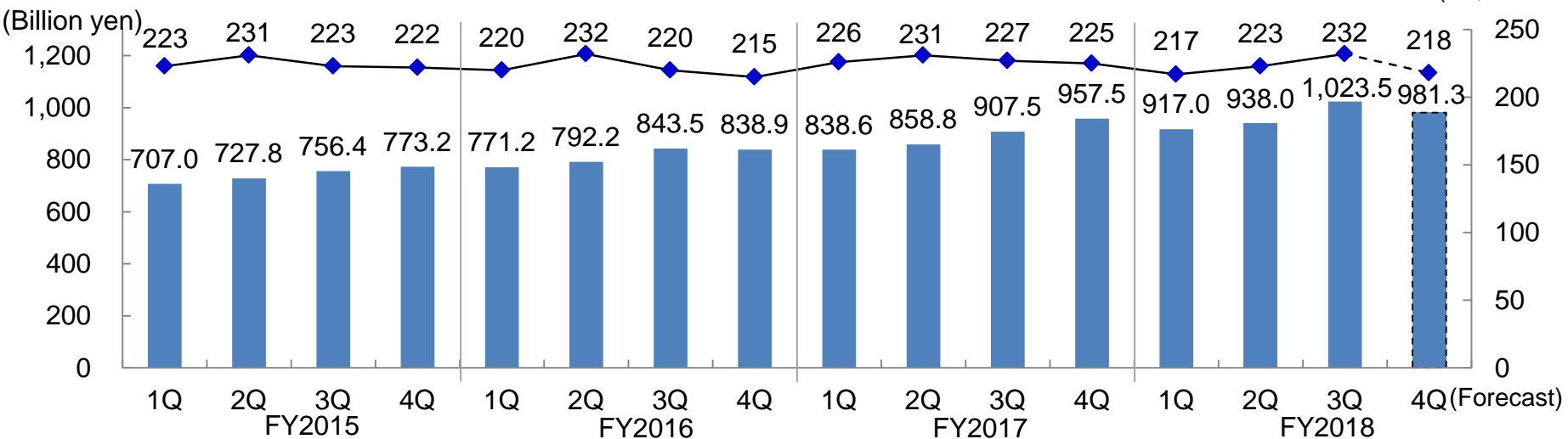
Quarterly Performance

* The results of FY2015 are based on JGAAP and the others are based on IFRS.

Revenue

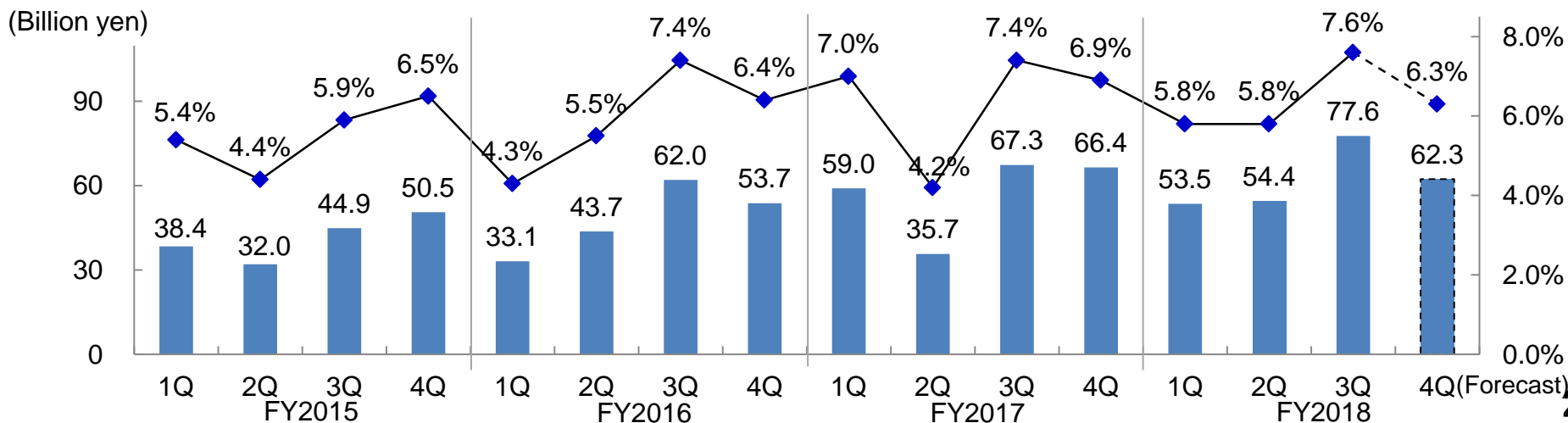
Revenue — Toyota global production

(10,000 Unit)



Operating Profit

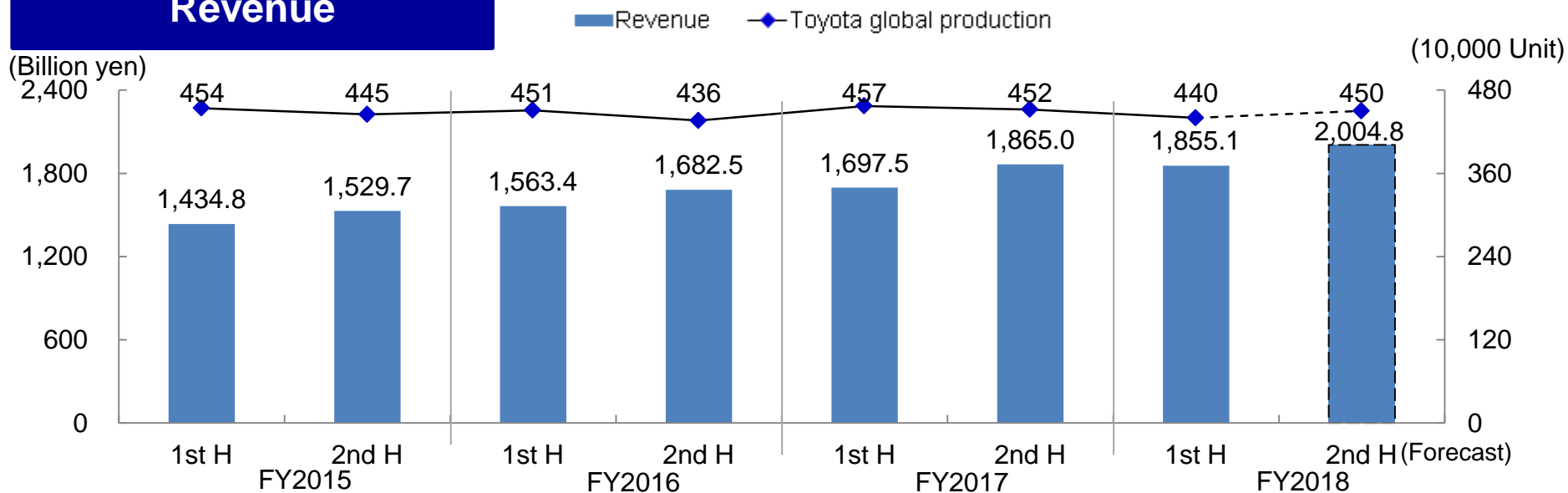
Operating Profit — Operating Profit Rate



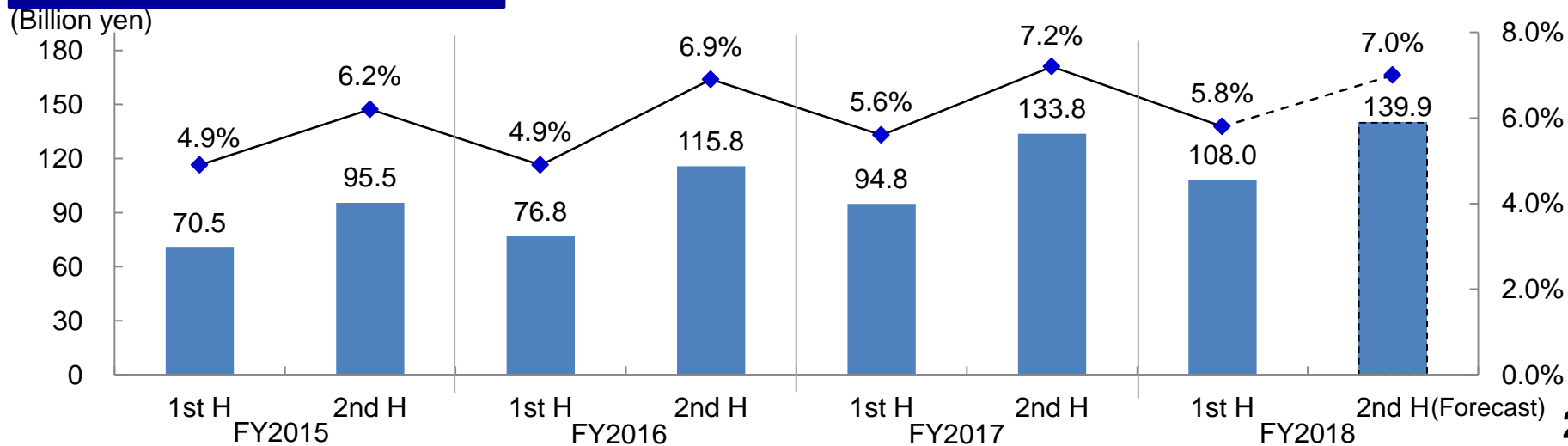
Half Yearly Performance

* The results of FY2015 are based on JGAAP and the others are based on IFRS.

Revenue



Operating Profit



Dividend per Share

* The results before FY2015 are based on JGAAP and the others are based on IFRS.

		FY2013	FY2014	FY2015	FY2016	FY2017	FY2018 (Forecast)
Dividend (Yen)	Interim	25	35	45	50	50	60
	Year-end	50	60	50	50	75	70
	Total	75	95	95	100	125	130
Dividend Payout Ratio		27.3%	29.7%	34.7%	28.2%	28.1%	27.7%
Repurchase of Treasury Stock (billion yen)		0	0	0	0	49.0	(*1) 70.0
Total return Ratio(*2)		27.3%	29.7%	34.7%	28.2%	66.5%	82.1%

(*1) Repurchasing of common stock is authorized by the board of directors' meeting held in May 2017

(*2) Total return Ratio = (Cash dividend paid + repurchase of treasury Stock) / Profit for the period

