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Jeff Owens

Executive Vice President and Chief Technology Officer

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Innovation for the Real World

Forward-looking statements

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Delphi at a glance

2014 revenue	**$17.0B**
2014 operating margin	**~12%**
2014 cash returned	**~$1.3B**
Engineers and scientists	**20,000**
IPO through 2014 TSR	**~250%**

Portfolio focused on relevant megatrends

Safe

Green

Connected

Business model that delivers value

Note: Total shareholder return (TSR) is defined as capital gains plus dividends

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Why we're the leader in technology

Strategic partnerships

- Strategic partnerships with over 30 leading technology companies
- Relationships provide accessibility to various software and applications
- Delphi Technology Advisory Council to promote intuitive innovation
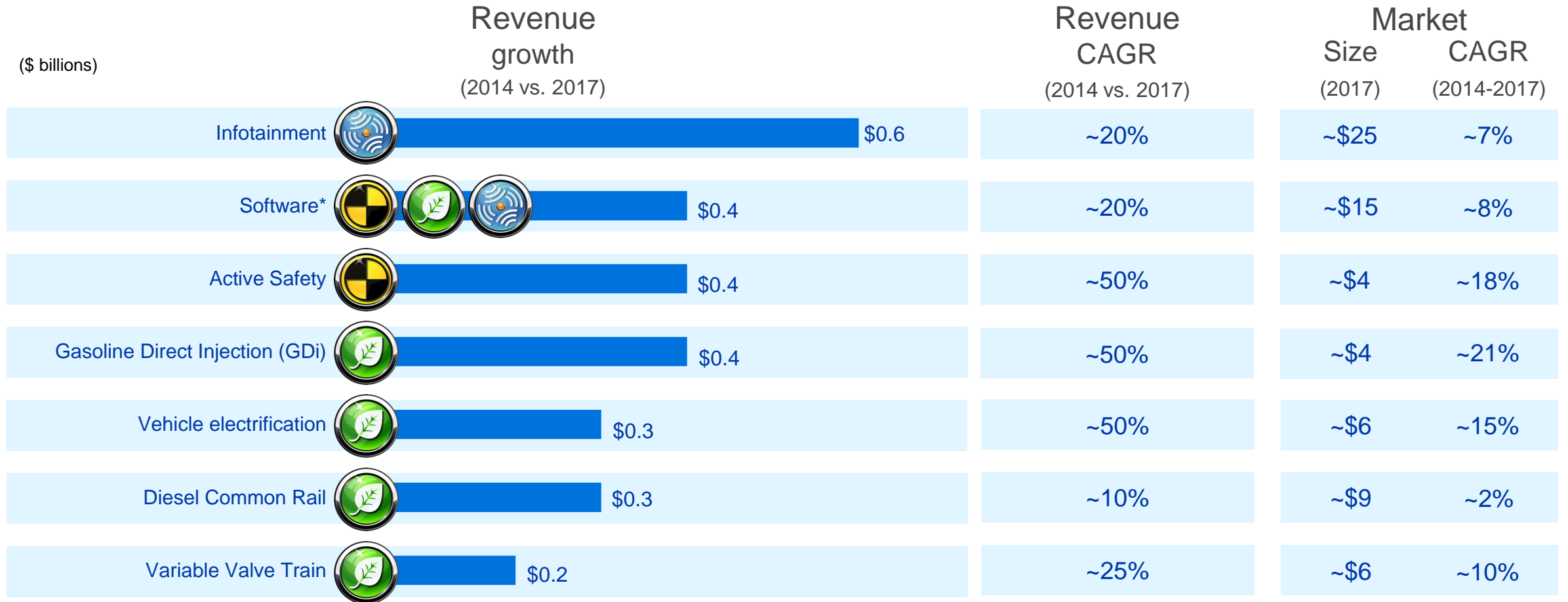
Global resource

- Mature global footprint with significant presence in best cost countries
- 5,000+ engineers dedicated to software, system and calibration development
- Engineering development centers strategically located: Silicon Valley

Innovative solutions

- Fast to market with advanced technology and flawless execution
- Regulatory compliant technologies meet customer requirements
- Software and vehicle integration expertise
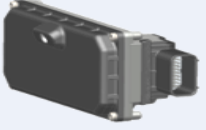
Global capability drives competitive advantage

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Technology continuing to drive growth

($ billions)	Revenue growth (2014 vs. 2017)	Revenue CAGR (2014 vs. 2017)	Market Size (2017)	Market CAGR (2014-2017)
Infotainment	$0.6	~20%	~$25	~7%
Software*	$0.4	~20%	~$15	~8%
Active Safety	$0.4	~50%	~$4	~18%
Gasoline Direct Injection (GDi)	$0.4	~50%	~$4	~21%
Vehicle electrification	$0.3	~50%	~$6	~15%
Diesel Common Rail	$0.3	~10%	~$9	~2%
Variable Valve Train	$0.2	~25%	~$6	~10%

Driving revenue growth of 5 points above market

*Software revenue is contained in product technologies

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Evolving to be greener, safer and more connected

Market drivers	2010 Delphi portfolio	2015 innovation
Better fuel economy Lower emissions	Port Fuel Injection	Gasoline Direct Injection (GDi)
Driver sensing Automated driving	Active Safety	Advanced Driver Assistance System (ADAS)
Internet connectivity Brought-in content	Onboard features	Connected Infotainment

Intelligent software solutions drive product evolution

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Delphi technologies enable a range of protection

Increased safety awareness driving market growth

NHTSA www.nhtsa.gov

EURO NCAP FOR SAFER CARS

2014 $7 billion
- 14%
- 43%
- 43%

2020 $16 billion
- 44%
- 34%
- 22%
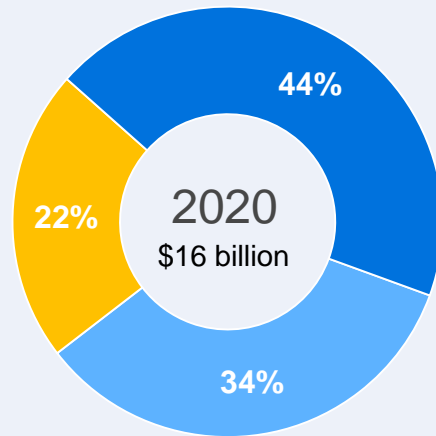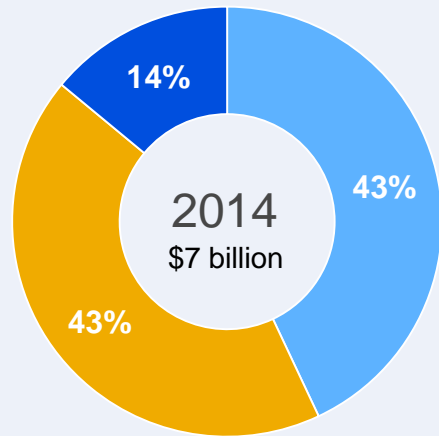
■ Passive ■ Active ■ Active – regulated and incentivized

Product portfolio

Forward View Camera

RACam

Backup Camera

Electronically Scanning Radar

Crash Sensors

Airbag Control Unit

Rear and Side Detection System
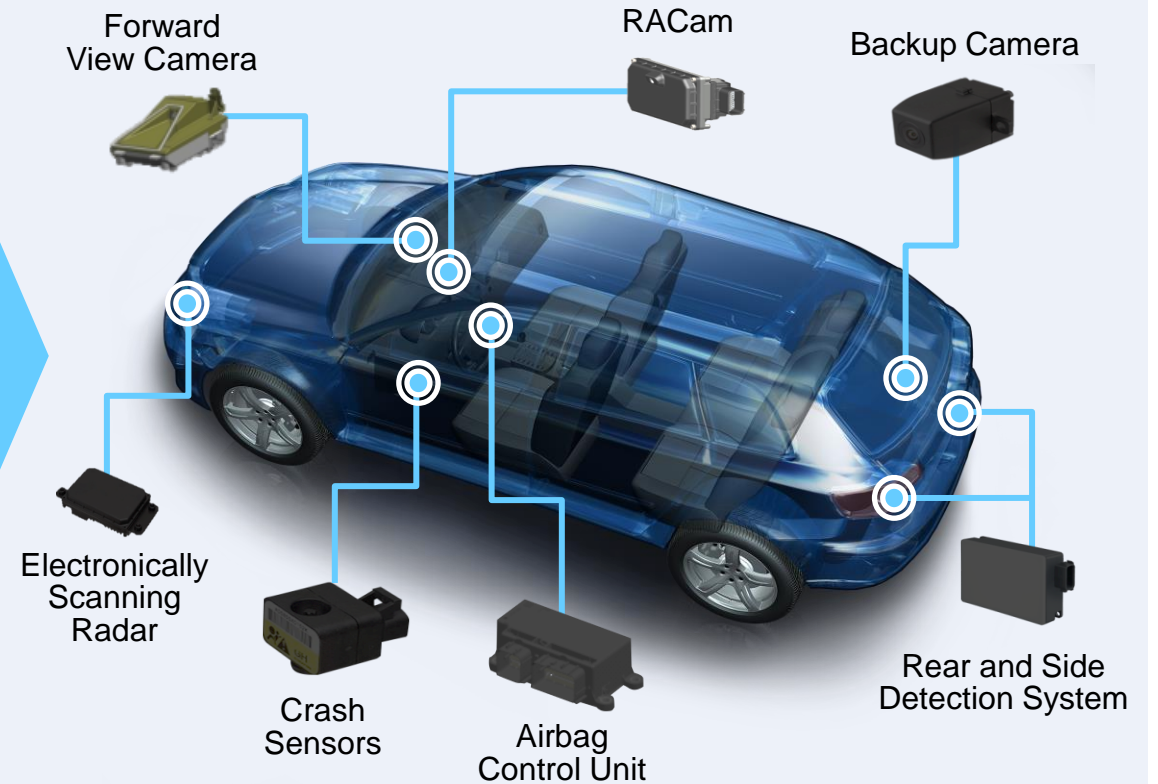
Integrated technology advances Active Safety value proposition

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Regulations drive fuel economy solutions

Regulatory trends driving growth

US fuel economy – 54.5 mpg by 2025
EU emissions – 95 CO_2 g/km by 2021

Fuel economy improvement, % (y-axis: 0, 5, 10, 15, 20, 25, 30, 35, 40, 45, 50, 55)

Full Hybrid

Turbo Diesel

Turbo GDi + VVT

Variable Valvetrain (VVT)

Range of OEM on-cost, $ (x-axis: 0, 500, 1000, 1500, 2000, 2500, 3000, 3500, 6500)
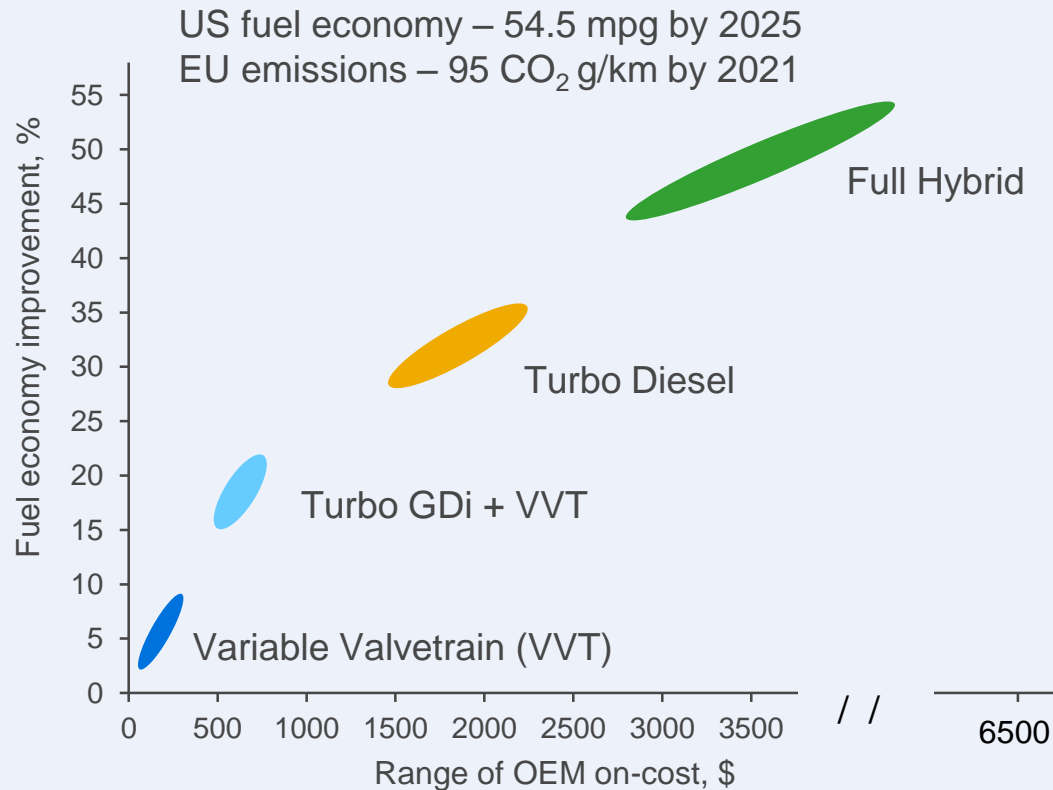
Maximizing Delphi content

Diesel Injector

Variable Valve Lifter

MAP Sensor

Exhaust Oxygen Sensor

EMS Controller

GDi Injector

e-Phasor

DC/DC Converter

High Voltage Architecture
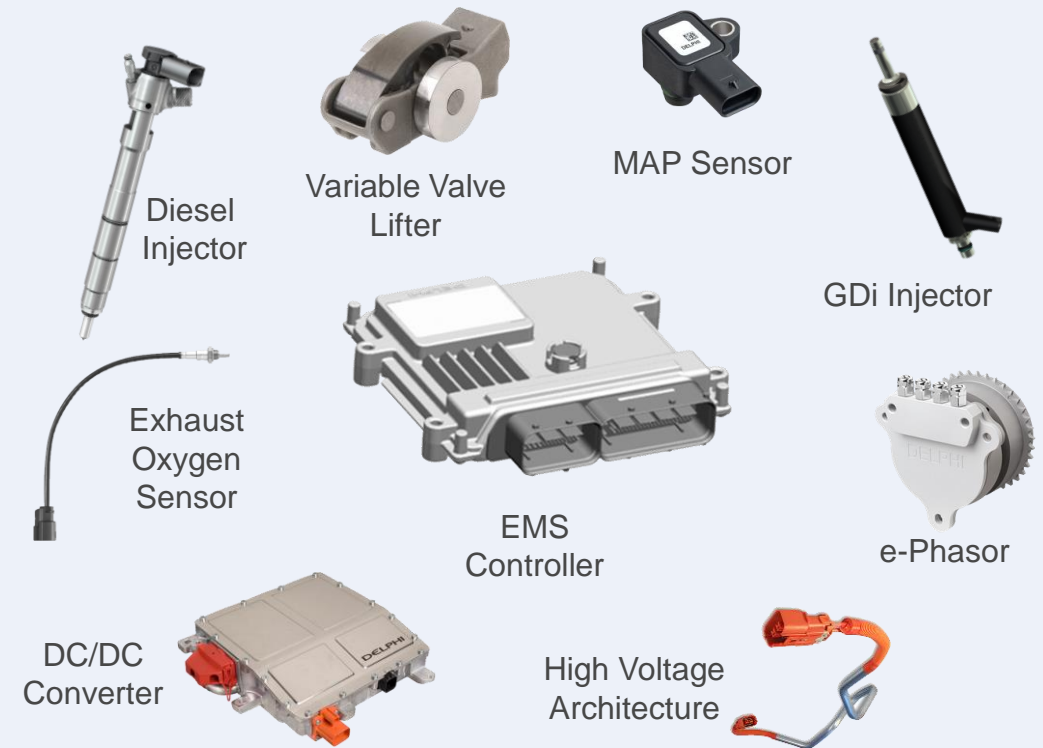
Fleet CAFE must improve 75% in the next 10 years: 30.8* to 54.5 mpg

*2014 model year average CAFE courtesy of the University of Michigan Transportation Research Institute (USMTRI)

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Creating the next generation of Infotainment

2010	2013	Today	Tomorrow
Connected navigation	Reconfigurable cluster & displays	Connected Infotainment	Eye gaze tracking & gesture control

World-class user experience

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Convergence requires system integration

Firmware providers

QNX

TEXAS INSTRUMENTS

nVIDIA.

Partner algorithms

NUANCE

TomTom

Apple CarPlay

android auto

Active Safety interface

System

Connected Infotainment system

Advanced rear seat entertainment solution

Fully reconfigurable cluster

Vehicle performance and diagnostics

System

Delphi hardware portfolio

Powertrain & architecture systems

Delphi proprietary software

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Delphi expertise enables a world-class user experience

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Multi-Domain Controller maximizes computing power
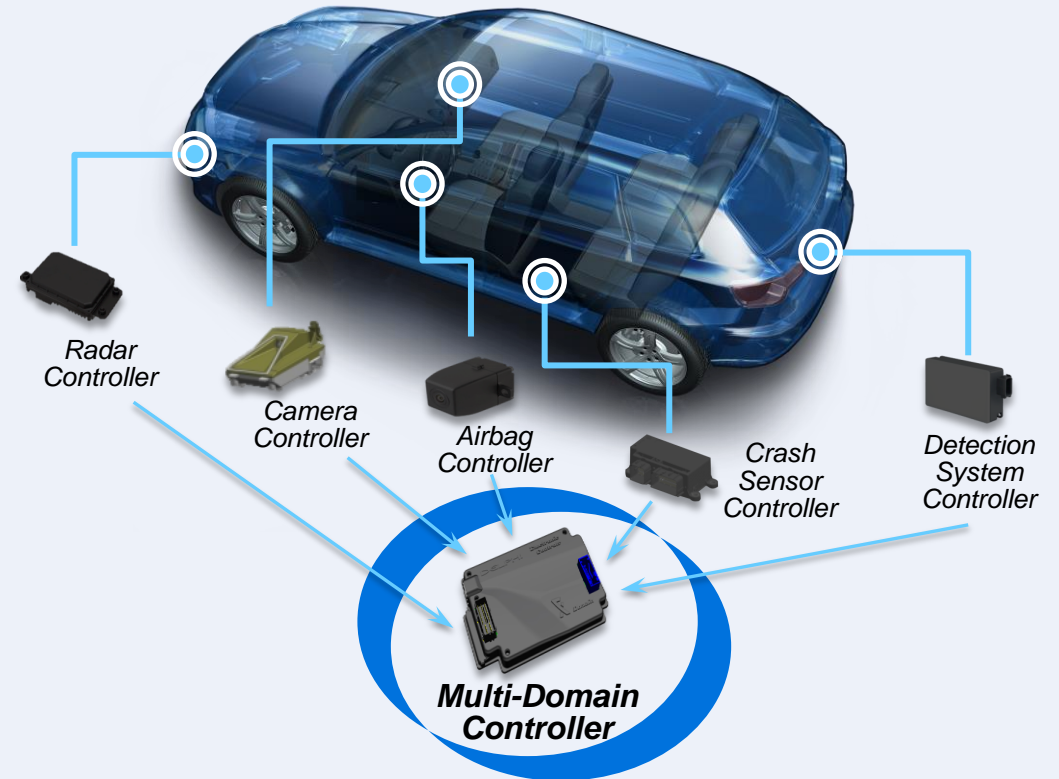
Multi-Domain Controller
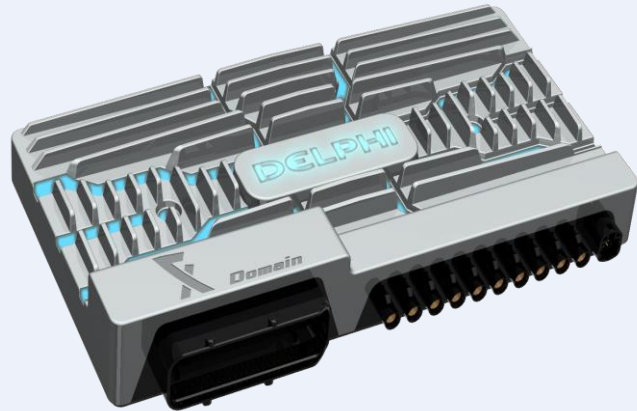
+ Scalable software platform
+ Reduced architecture complexity
  + Faster communication
  + Capacity to future proof

First launch in 2016

Centralized vehicle intelligence

Radar Controller

Camera Controller

Airbag Controller

Crash Sensor Controller

Detection System Controller

Multi-Domain Controller
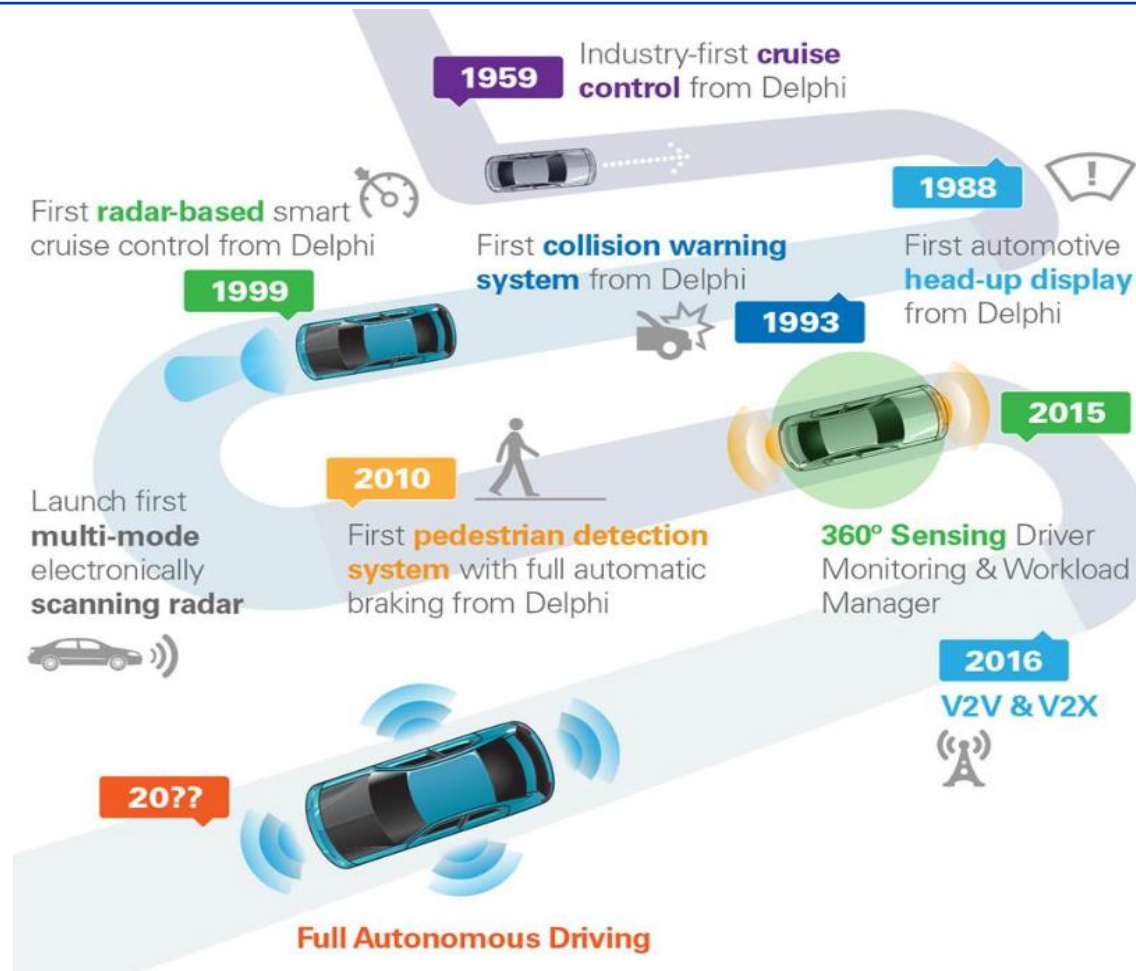
Enables future system complexity

The road to automated driving

Delphi completed first coast-to-coast trip in an automated vehicle

Reinventing the road trip

Automated drive highlights	Arriving in New York City
~3,400 miles traveled	
~99% of trip fully automated	
9 days, 15 states	
20 sensors	
~3 terabytes of data collected	

Setting records and breaking boundaries

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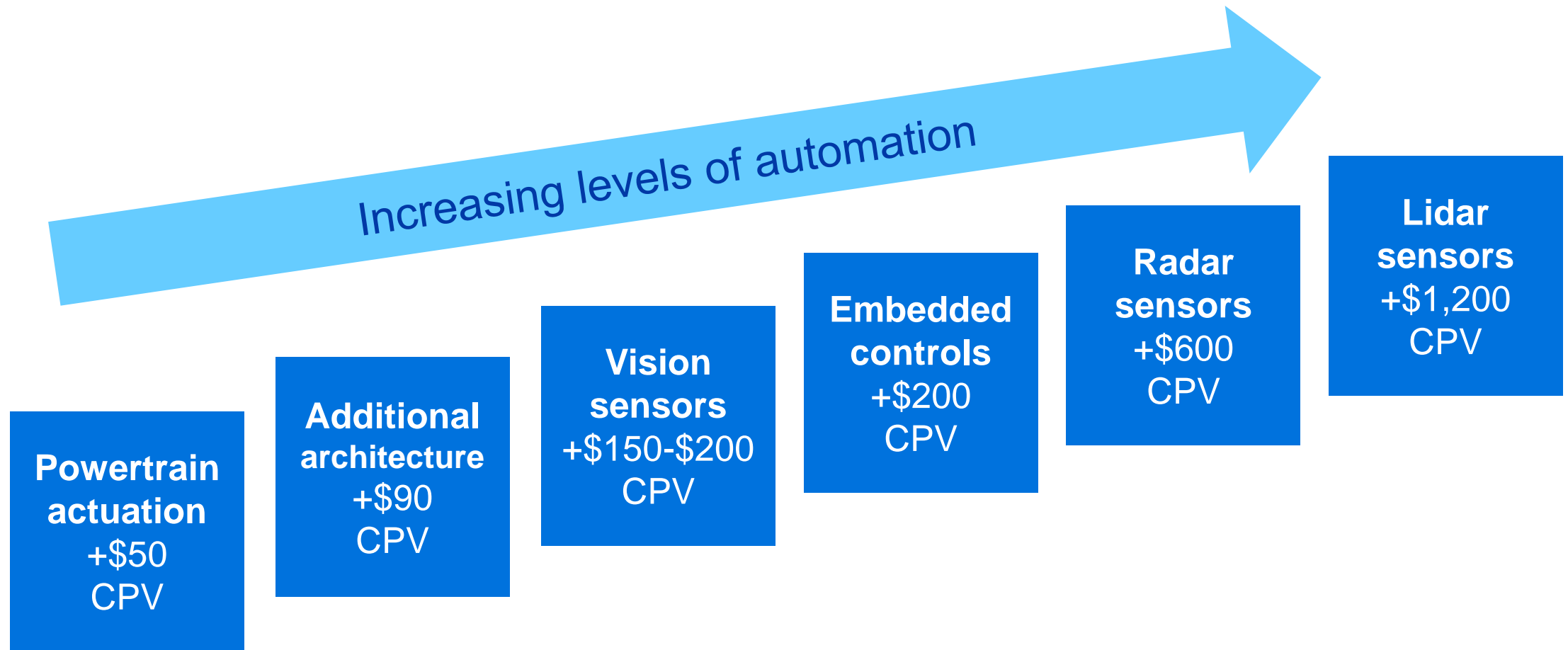# What we learned...

Next steps

- Further develop cameras to detect diverse lane markings

- Improve camera performance in bright sunlight and harsh weather conditions

- Driving behavior optimization for a more natural feel

- Democratization of Automated Driving features for production programs

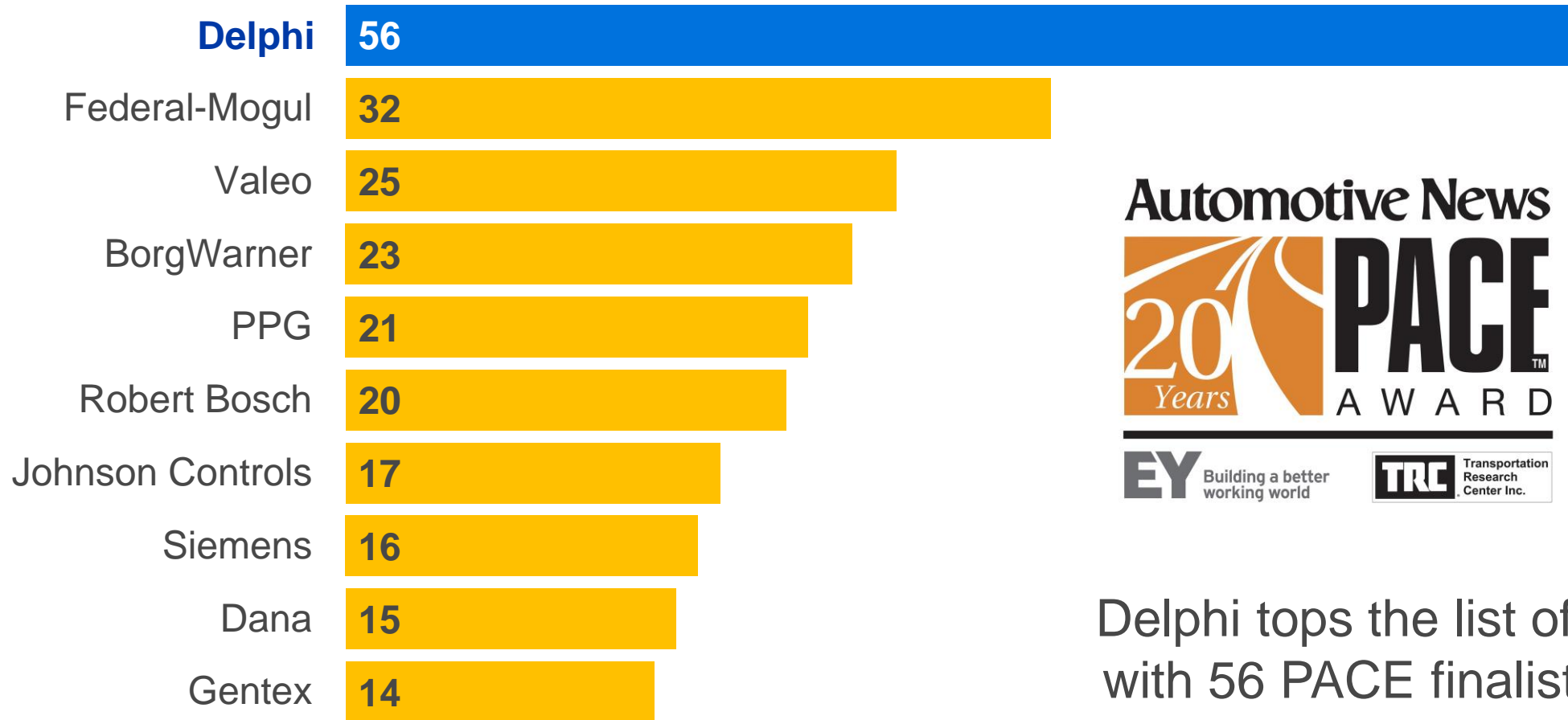## Radar worked well in all conditions

Further improving the technology of the future

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Increasing content per vehicle

Increasing levels of automation

Lidar sensors +$1,200 CPV

Radar sensors +$600 CPV

Embedded controls +$200 CPV

Vision sensors +$150-$200 CPV

Additional architecture +$90 CPV

Powertrain actuation +$50 CPV

+$2,000 - $2,500 CPV when moving to a fully autonomous vehicle

Note: assumes six lidar sensors, five radar sensors and two vision sensors

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Award-winning innovation

Company	Awards
Delphi	**56**
Federal-Mogul	32
Valeo	25
BorgWarner	23
PPG	21
Robert Bosch	20
Johnson Controls	17
Siemens	16
Dana	15
Gentex	14

Delphi tops the list of all companies with 56 PACE finalists and awards*

Proud recipient of an industry-leading 17 PACE awards

*2014 PACE information courtesy of Automotive News

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The future. Now.

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Innovation for the Real World