KeyBanc Industrial, Automotive & Transportation Conference

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Executive Vice President and Chief Technology Officer
Forward-looking statements

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## Delphi at a glance

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>2014 revenue</td>
<td>$17.0B</td>
</tr>
<tr>
<td>2014 operating margin</td>
<td>~12%</td>
</tr>
<tr>
<td>2014 cash returned</td>
<td>~$1.3B</td>
</tr>
<tr>
<td>Engineers and scientists</td>
<td>20,000</td>
</tr>
<tr>
<td>IPO through 2014 TSR</td>
<td>~250%</td>
</tr>
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**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*
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
## Technology continuing to drive growth

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<tbody>
<tr>
<td>Infotainment</td>
<td>$0.6</td>
<td>~20%</td>
<td>~$25</td>
<td>~7%</td>
</tr>
<tr>
<td>Software*</td>
<td>$0.4</td>
<td>~20%</td>
<td>~$15</td>
<td>~8%</td>
</tr>
<tr>
<td>Active Safety</td>
<td>$0.4</td>
<td>~50%</td>
<td>~$4</td>
<td>~18%</td>
</tr>
<tr>
<td>Gasoline Direct Injection (GDi)</td>
<td>$0.4</td>
<td>~50%</td>
<td>~$4</td>
<td>~21%</td>
</tr>
<tr>
<td>Vehicle electrification</td>
<td>$0.3</td>
<td>~50%</td>
<td>~$6</td>
<td>~15%</td>
</tr>
<tr>
<td>Diesel Common Rail</td>
<td>$0.3</td>
<td>~10%</td>
<td>~$9</td>
<td>~2%</td>
</tr>
<tr>
<td>Variable Valve Train</td>
<td>$0.2</td>
<td>~25%</td>
<td>~$6</td>
<td>~10%</td>
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Driving revenue growth of 5 points above market

*Software revenue is contained in product technologies*
Evolving to be greener, safer and more connected

<table>
<thead>
<tr>
<th>Market drivers</th>
<th>2010 Delphi portfolio</th>
<th>2015 innovation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better fuel economy</td>
<td>Port Fuel Injection</td>
<td>Gasoline Direct Injection (GDi)</td>
</tr>
<tr>
<td>Lower emissions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Driver sensing</td>
<td>Active Safety</td>
<td>Advanced Driver Assistance System (ADAS)</td>
</tr>
<tr>
<td>Automated driving</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet connectivity</td>
<td>Onboard features</td>
<td>Connected Infotainment</td>
</tr>
<tr>
<td>Brought-in content</td>
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Intelligent software solutions drive product evolution
Delphi technologies enable a range of protection

Increased safety awareness driving market growth

- **Passive**: 14% in 2014, 22% in 2020
- **Active**: 43% in 2014, 34% in 2020
- **Active – regulated and incentivized**: 44% in 2014, 44% in 2020

**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**
Regulations drive fuel economy solutions

Regulatory trends driving growth

- US fuel economy – 54.5 mpg by 2025
- EU emissions – 95 CO₂ g/km by 2021

Maximizing Delphi content

- Turbo Diesel
- Turbo GDi + VVT
- Variable Valvetrain (VVT)

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)
Creating the next generation of Infotainment

<table>
<thead>
<tr>
<th>2010</th>
<th>2013</th>
<th>Today</th>
<th>Tomorrow</th>
</tr>
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<tbody>
<tr>
<td>Connected navigation</td>
<td>Reconfigurable cluster &amp; displays</td>
<td>Connected Infotainment</td>
<td>Eye gaze tracking &amp; gesture control</td>
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World-class user experience
Convergence requires system integration

Delphi expertise enables a world-class user experience
**Multi-Domain Controller maximizes computing power**

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<th>Multi-Domain Controller</th>
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<tr>
<td>+ Scalable software platform</td>
</tr>
<tr>
<td>+ Reduced architecture complexity</td>
</tr>
<tr>
<td>+ Faster communication</td>
</tr>
<tr>
<td>+ Capacity to future proof</td>
</tr>
<tr>
<td><strong>First launch in 2016</strong></td>
</tr>
</tbody>
</table>

**Centralized vehicle intelligence**

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
- ~3,400 miles traveled
- ~99% of trip fully automated
- 9 days, 15 states
- 20 sensors
- ~3 terabytes of data collected

### Arriving in New York City

Setting records and breaking boundaries
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
Increasing content per vehicle

- **Powertrain actuation** +$50 CPV
- **Additional architecture** +$90 CPV
- **Vision sensors** +$150-$200 CPV
- **Embedded controls** +$200 CPV
- **Radar sensors** +$600 CPV
- **Lidar sensors** +$1,200 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
Award-winning innovation

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
The future. Now.