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Deutsche Bank

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Innovation for the Real World

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Chief Executive Officer and President

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Forward-looking statements

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Competitive advantages

Advanced technologies	Solutions for our customers' challenges
Global footprint	Global scale with regional capabilities
Industry-leading cost structure	Operating model with significant leverage
Flawless operating execution	Outstanding customer satisfaction
Diversified business model	Disciplined and balanced growth

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Kevin Clark

Chief Operating Officer

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2014 highlights

- Disciplined top-line expansion
- Rotated Western European footprint
- Reduced South American cost structure
- Accelerated the introduction of new technologies
- Expanded margins and increased earnings and cash flow
- Returned significant cash to shareholders

Increased shareholder value

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2015 environment

- Underlying trends in vehicle production remain positive
- Continued strong demand for reduced CO_2 emissions
- Increased demand for Active Safety solutions
- Continued increase in vehicle electrification
- FX rates resulting in headwinds

Overall market dynamics are positive

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2015 priorities remain unchanged

Disciplined revenue growth

- Accelerate introduction of market relevant technologies
- Continue rotation to high growth regions
- Further diversify customer base and platform mix

Expand margins

- Continue footprint rotation to best cost countries
- Integrate our enterprise operating system
- Increase operating leverage

Increased returns

- Maintain investment grade balance sheet
- Increase investment in organic and acquisition growth
- Continue to return cash to shareholders

Increase shareholder value

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2015 priorities
Disciplined revenue growth















Showcased our advanced technology solutions at 2015 CES

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2015 priorities
Expand margins

EBIT margin expansion[1]



Margin expansion drivers

- Acceleration of disciplined revenue growth
- Acquisition integration
- Launch of innovative products
- Continued footprint rotation
- Enterprise-wide EOS
- Flawless execution

Consistent improvement in operating leverage

1. Adjusted for restructuring charges, acquisition-related integration costs and asset impairment costs
Note: 2014 and 2015 data represents the midpoint of current Delphi guidance

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2015 priorities
Increased returns

- Maintain investment grade ratings
- Disciplined re-investment in business to drive growth
- Pursue value enhancing acquisitions
- Continue to return cash to shareholders
  - Board authorized a new $1.5 billion share repurchase program

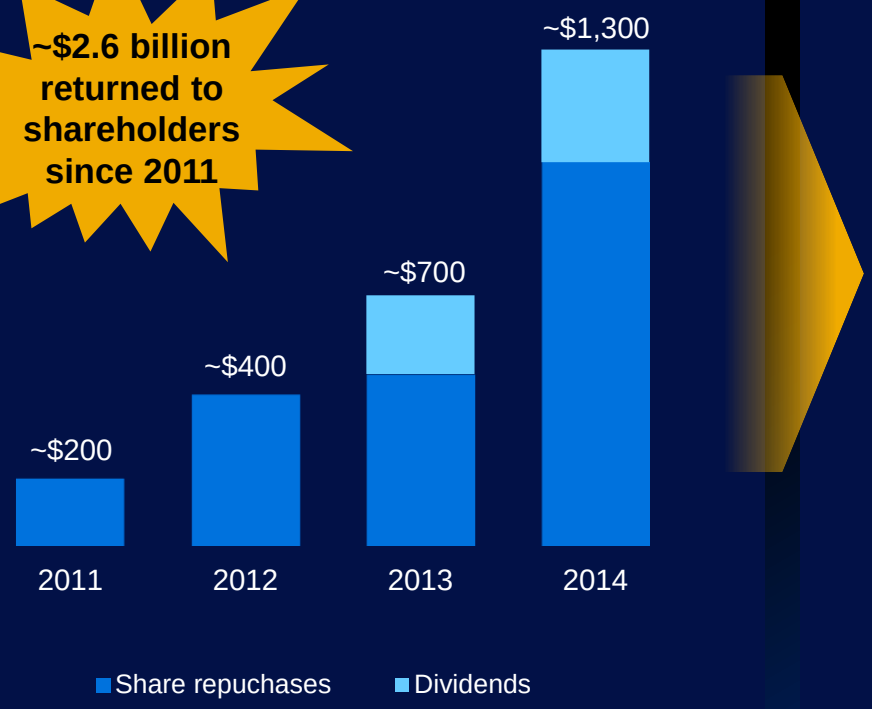
Driving additional shareholder value

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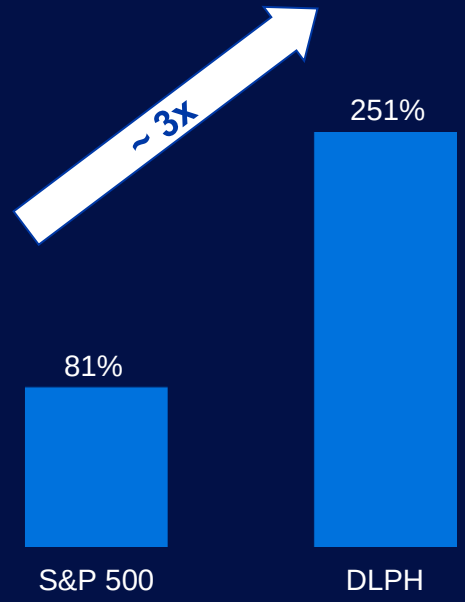
2015 priorities
Increased returns

Share repurchases and dividends
($ millions)

~$2.6 billion returned to shareholders since 2011



Total shareholder returns*
IPO – Q4 2014



Cash deployment contributing to strong shareholder returns

*Total shareholder returns is defined as capital gains plus dividends

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Mark Murphy

Chief Financial Officer and Executive Vice President

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Update on 2014

- Global vehicle production increased 2%
- Revenue impacted by currency and select market weakness
- Strong margin expansion on solid operating performance
- Delivered double digit EPS growth
- Continued return of cash to shareholders

Another year of record performance

2015 guidance assumptions

• Global market growth	~2%
– North America	~3%
– Europe	~2%
– China	~7%
– South America	Flat
• Euro	1.20

Continued industry volume growth

Source: December 2014 IHS Automotive and Delphi internal estimates
Note: Includes medium/heavy duty trucks

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2015 guidance impacted by currency

(millions, except per share amounts)	@ 2014 FX rates[1]	@ 2015 FX rates
Reported revenue	$17,900 - $18,300	$17,100 - $17,500
Reported growth %	*5% - 7%*	*1% - 3%*
Operating income[2]	$2,200 - $2,300	$2,100 - $2,200
Operating margin	*12.3% - 12.6%*	*12.3% - 12.6%*
EPS[2]	$5.55 - $5.85	$5.25 - $5.55
Average share count	298	298
Cash flow before financing	~$1,300	~$1,200
Tax rate	~17%	~17%

~4 points over market

1. Average actual 2014 FX rates
2. Adjusted for restructuring and acquisition-related integration costs

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Why invest in Delphi

Well positioned with advanced technology solutions

Significant global scale

Industry-leading cost structure

Track record of flawless operating execution

Balanced and disciplined capital allocation

Delivering industry-leading shareholder returns

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Non-US GAAP financial metrics

($ millions)

	2013
Net income attributable to Delphi	$1,212
Income tax expense	$256
Interest expense	$143
Other expense, net	$18
Noncontrolling interest	$89
Equity income, net of tax	($34)
Restructuring	$145
Asset impairments	-
Acquisition-related integration costs	$15
Adjusted operating income	$1,844
Revenue	$16,463
Adjusted operating income margin	11.2%

The company's full year 2014 and 2015 guidance was determined using a consistent manner and methodology

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Non-US GAAP financial metrics

($ millions, except per share amounts)

	2013
Net income attributable to Delphi	$1,212
Adjusting items	
Restructuring charges	$145
Acquisition-related integration costs	$15
Acquisition-related advisory and transaction costs	-
Asset impairments	-
Debt extinguishment costs	$39
Tax impact of adjusting items (a)	($40)
Adjusted net income attributable to Delphi	$1,371
Weighted average number of diluted shares outstanding	311.8
Diluted net income per share attributable to Delphi	$3.89
Adjusted net income per share	$4.40

(a) Represents the income tax impacts of the adjustments made for restructuring charges, acquisition-related integration costs, acquisition-related advisory and transaction costs, asset impairments and debt extinguishment costs, by calculating the income tax impact of these items using the appropriate tax rate for the jurisdiction where the charges were incurred

The company's full year 2014 and 2015 guidance was determined using a consistent manner and methodology

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