

Twitter Thread by Vivek Shah

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#SONACOMS #POSITIONAL - CMP 495

Sonacoms already supplying to #Tesla

(As per the Report)

Is the Highlighted player #OLAElectric?

Technically looks good for 550--600+ (Initially)

SL 438 on C.B

Sona BLW Precision Forgings

19 August 2021

Exhibit 93. Details of 15 EV systems and components development program wins

| Sl. Customer | Program Name | End customer location** | Systems and Components | Year of Win | Year of SOP ¹ |
|--|--------------|-------------------------|---------------------------|-------------|--------------------------|
| 1 Global Tier 1 Supplier for PVs, CVs, OHVs and EVs - supplying to Global OEM of EVs ¹ | Program A1 | North America | Differential Gears | FY16 | 2016 |
| 2 Global Tier 1 Supplier for PVs, CVs, OHVs and EVs - supplying to Global OEM of EVs ¹ | Program A2 | North America | Differential Gears | FY20 | 2019 |
| 3 Global OEM of EVs ¹ | Program B1 | North America | Differential Assembly | FY18 | 2019 |
| 4 Global OEM of EVs ¹ | Program B2 | North America | Differential Assembly | FY20 | 2020 |
| 5 Global OEM of EVs ¹ | Program B3 | China | Differential Assembly | FY21 | 2020 |
| 6 Indian OEM of Electric 2Ws- Scooters¹ | Program C | India | BLDC Motor | FY21 | 2020 |
| 7 Indian OEM of Electric 3Ws ¹ | Program D | India | E-Axle | FY21 | 2021 |
| 8 Indian OEM of PVs, CVs, OHVs and EVs ¹ | Program E1 | India | E-Axle | FY21 | 2021 |
| 9 North American Tier 1 Supplier for PVs, CVs, OHVs, and EVs - supplying to Global OEM of EVs ² | Program F | North America | Differential Gears | FY20 | 2021 |
| 10 Chinese Tier 1 Supplier for EVs - supplying to Global OEM of PVs and EVs ² | Program G | North America | Differential Assembly | FY20 | 2021 |
| 11 European OEM of PVs and EVs ² | Program H | Europe | Differential Assembly | FY21 | 2022 |
| 12 Indian OEM of PVs, CVs, OHVs and EVs ² | Program E2 | India | Differential Assembly | FY20 | 2022 |
| 13 European Tier 1 Supplier for PVs and EVs - supplying to Chinese OEM of EVs ³ | Program I* | China | Differential Assembly | FY21 | TBD ⁴ |
| 14 Indian OEM of Electric 2Ws- Motorcycles ³ | Program J | India | PMSM Motor and Controller | FY21 | TBD ⁴ |
| 15 Global OEM of EVs ² | Program B4 | North America | Differential Assembly | FY21 | 2021 |

Source: COMPANY, JM Financial; # SOP means Start of production. * Proto order received, final order to be received; ** Customer location is based on the location of the OEM to whom products are supplied for end-use; 1. **Active and in serial production**, 2. Serial production to commence; 3. Prototype supplied, serial production to commence; 4. To be decided