WINNING THE FUTURE

BY BUILDING OUTSTANDING MOBILITY SERVICES

LAS VEGAS, JANUARY 8, 2019
KLAUS ENTENMANN, CEO DAIMLER FINANCIAL SERVICES AG
WE HAVE CONSTANTLY GROWN OUR CORE BUSINESS – MOBILITY SERVICES OFFER NEW OPPORTUNITIES

DAIMLER GROUP
UNIT SALES

DAIMLER FINANCIAL SERVICES
CONTRACT VOLUME

MOBILITY SERVICES
CUSTOMERS

8.9 %
CAGR

11.2 %
CAGR

95.0 %
CAGR

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OUR FINANCIAL STRENGTH ALLOWS US TO SIGNIFICANTLY INVEST IN FUTURE PROFIT POOLS

+50% investment growth @ DAI (2018 vs 2014)

~€150bn financing & leasing portfolio* @ DFS

MOBILITY SERVICES INVESTMENTS [€ mn]

2009 10 11 12 13 14 15 16 17 18

* Per Sep 30, 2018
DAIMLER FINANCIAL SERVICES –
A DIVISION OF DAIMLER

MERCEDES-BENZ CARS
MERCEDES-BENZ VANS
DAIMLER FINANCIAL SERVICES
DAIMLER TRUCKS
DAIMLER BUSES
WE ARE GETTING READY FOR THE FUTURE BY DIVERSIFYING OUR BUSINESS
2019 WILL WITNESS THE BIRTH OF
A NEW COMPANY NAME

Today's Daimler Financial Services AG will become ...

DAIMLER MOBILITY AG
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INCREASINGLY MORE URBAN CUSTOMERS PREFER TO CONSUME MOBILITY AS A SERVICE

TODAY
BUYING
(car-based) mobility as a product

TOMORROW
CONSUMING
(car-based) mobility as a service

Becoming a trillion $ market opportunity?
Diversify own business towards the new and fast growing market segment of (autonomous) mobility services and tap into future profit pools for Daimler Group by building...

- Customer base [and data]
- Operational know-how*
- Technological capabilities (& talent pool)*
- Brand awareness
- Geographical footprint
- City relationships

* including pre-requisites for autonomous driving services
01 Our strategic rationale
02 Our business set-up
03 Our verticals
04 Our way forward
WE HAVE BUILT A LEADING MOBILITY SERVICES PORTFOLIO

DAIMLER IS LEADING THE WAY AMONGST OEMs!
THREE STRATEGIC FOCUS AREAS OF OUR ON-DEMAND MOBILITY BUSINESS

1. Intelligent Apps.
2. CAR SHARING
   Manage IoT fleets & strengthen MB brand
3. RIDE-HAILING
   Scale customer base & geographic footprint
4. MULTI-MODAL
   Build mobility marketplace & city relationships

ALL VERTICALS: TECHNOLOGICAL & OPERATIONAL CAPABILITIES FOR ON-DEMAND SERVICES: SOFTWARE DEVELOPMENT, DATA SCIENCE, UI/UX, PERFORMANCE MARKETING, ETC.
OUR MOBILITY OFFERS ARE AVAILABLE IN 19 COUNTRIES

- USA
- CANADA
- CHINA
- COLOMBIA
- PERU
- CHILE
- GERMANY
- NETHERLANDS
- UK
- IRELAND
- FRANCE
- SPAIN
- PORTUGAL
- ITALY
- AUSTRIA
- POLAND
- ROMANIA
- GREECE
- SWEDEN
DAIMLER MOBILITY SERVICES HAS ACCELERATED GROWTH

Transactions [mn] 45 CITIES
Customers [mn] 65 CITIES

2018: YTD November. Data includes car2go, Intelligent Apps (mytaxi, Beat, Chauffeur Privé, CleverTaxi), moovel.
GMV DRIVES VALUE – WE HAVE DRIVEN GMV

GROSS MERCHANDISE VALUE (GMV) [in €mn]

+81% p.a.

2012 2013 2014 2015 2016 2017 FC 2018
CAR2GO HAS INVENTED FLEXIBLE CAR SHARING AND BUILDS A STRONG BASIS FOR HANDLING IoT FLEETS

*YTD Nov 2018 vs. YTD Nov 2016

- 3.3 mn Customers
- 25 Cities
- 8 Countries
- 14,000 Vehicles
- 22 mn Rentals

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EVERYDAY, OVER 10,000 RIDES ARE ELECTRIC

3 EV LOCATIONS
Stuttgart, Amsterdam and Madrid

10,000 E-RIDES PER DAY
Every tenth kilometer driven in a car2go is electric.

80MN KILOMETERS
car2go members have already driven more than 80 million electric kilometers.

Next step: car2go will launch fully-electric fleet with 400 vehicles in Paris in January 2019
INTELLIGENT APPS IS AMONGST THE TOP 10 RIDE-HAILING COMPANIES – SCALING CUSTOMER BASE AND FOOTPRINT

- 17 mn Customers
- 116 Cities
- 16 Countries
- 6 Rides per second

*YTD Nov 2018 vs. YTD Nov 2016.*
INTELLIGENT APPS COVERS DIFFERENT MARKET SEGMENTS DEPENDING ON REGULATORY ENVIRONMENT

- LICENSED TAXI IN EUROPE
- PRIVATE HIRE VEHICLES IN EUROPE
- PRIVATE HIRE VEHICLES IN LATIN AMERICA
MYTAXI HAS LAUNCHED E-SCOOTER ACTIVITIES

- Launched in Lisbon, Portugal
- Pilot live since Q4 2018
- 300+ Scooters
- Fully electric, renewable energy
- Aggressive scaling in 2019
MOOVEL IS CREATING A MOBILITY MARKETPLACE TO AGGREGATE OPTIONS AND BUILD CITY RELATIONSHIPS

>6 mn Customers  
20 Cities  
2 Countries  
28 aggregated services  
25 mn transactions**

*YTD Nov 2018 vs. YTD Nov 2016  **YTD Nov 2018
MOOVEL PROVIDES A FULL-FLEDGED MOBILITY-AS-A-SERVICE SOLUTION
MOOVE\text{L PROVIDES RESPONSIVE SHUTTLE TECHNOLOGY (SOFTWARE AS A SERVICE)}

\textbf{EXAMPLE}

\textbf{flexIA}

\begin{itemize}
  \item \textbf{Launch}: Q4 2018
  \item \textbf{Operations}: SMS Transportation
  \item \textbf{Partners}: City of LA, Mercedes-Benz DTLA
\end{itemize}
MOOVE MANAGES MOBILITY ALLOWANCES FOR CORPORATIONS

COMPANY

- Adds eligible employees & determines allowance
- Pays subscription fee per employer & set-up fee

PROVIDER

- Searches & books provider, uses allowance
- Pays transaction-based ticket commission

EMPLOYEES

- Personal data
- Payment data

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**BMW AND DAIMLER WILL JOIN FORCES WHEN IT COMES TO MOBILITY SERVICES**

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<tr>
<th>Car Sharing</th>
<th>Ride-Hailing</th>
<th>Multi-Modal</th>
<th>Charging</th>
<th>Parking</th>
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<tr>
<td><strong>DAIMLER</strong></td>
<td><img src="image" alt="Car2Go" /></td>
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<td><img src="image" alt="Parkmobile" /></td>
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Daimler and BMW hold a 50% stake in each of the verticals
DAIMLER MOBILITY AG WILL FURTHER DEVELOP THE MOBILITY BUSINESS

DAIMLER MOBILITY SERVICES GmbH** (DMS) WILL ...

- **CASE**
  - ... Steer JVs with BMW and other shareholdings and actively increase valuation
  - ... Continuously analyze the market for mobility services and tap into new (investment) opportunities
  - ... Establish and drive Daimler’s relationships with cities
  - ... Leverage mobility shareholdings for Daimler and work towards ecosystem
  - Develop service concepts and capabilities for the era of self-driving car services
  - ... Build and establish scalable ePayment solutions for Daimler Group

* S: Shared Mobility; Financial Services; ** subsidiary of Daimler Financial Services AG
DAIMLER WILL JOIN FORCES WITH GEELY TO SERVE THE PREMIUM RIDE-HAILING MARKET IN CHINA

GEELY JOINT VENTURE

- Headquartered in Hangzhou
- Initial fleet to include various MB models: S-Class Maybach, S-Class, E-Class, V-Class
WE ARE **ENRICHING THE ECOSYSTEM AROUND THE MERCEDES-BENZ BRAND BY ADDING MOBILITY SERVICES**
AUTONOMOUS DRIVING TECHNOLOGY WILL REINFORCE THE SURGE OF **ON-DEMAND MOBILITY**

- Higher utilization of fleets
- Lower price per mile
- Increasing customer demand
WE WILL START A PUBLIC DEMONSTRATION OF SELF-DRIVING CAR SERVICES IN 2019

AUTONOMOUS TRIAL IN SAN JOSÉ, CA

- Automated S-Class vehicles
- Start in H2 2019
- SAE LEVEL 4/5
- Joint pilot of Daimler & Bosch
DAIMLER IS WELL PREPARED TO SHAPE THE FUTURE OF MOBILITY

LEADING OEM MOBILITY SERVICES PORTFOLIO

SOLID FOUNDATION TO TAP INTO SIGNIFICANT REVENUE AND PROFIT POTENTIAL

CUTTING-EDGE SELF-DRIVING VEHICLE TECHNOLOGY
Disclaimer

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