



Third Quarter FY 2025 Quarterly Update

Infineon Technologies AG
Investor Relations



Infineon at a glance

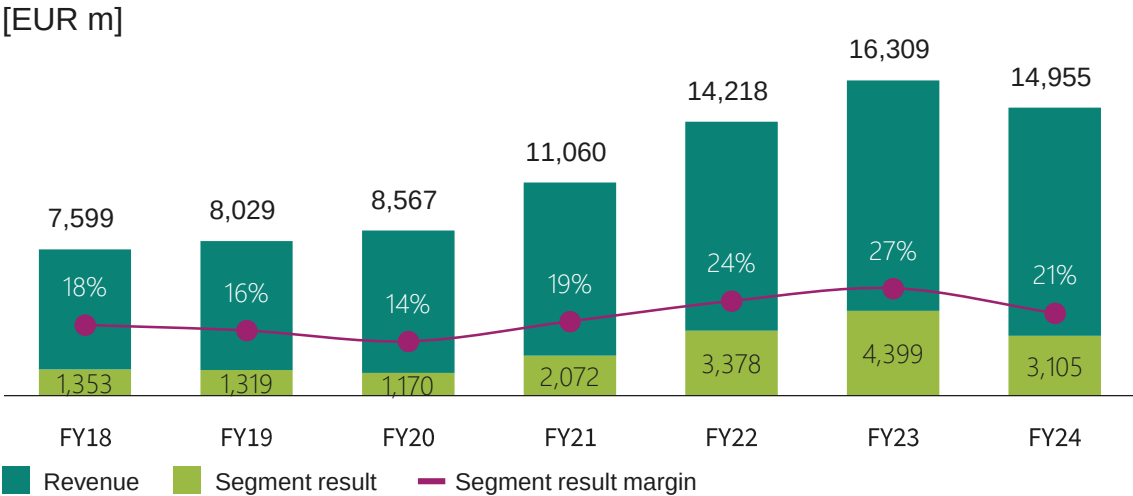
Addressing long-term high-growth trends

Energy
green and efficient

Mobility
clean and safe

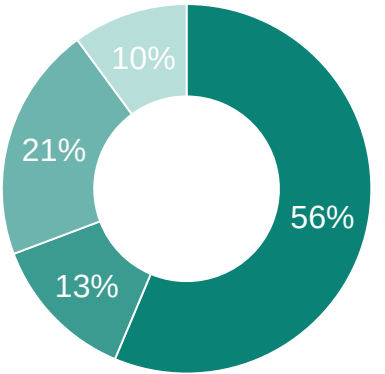
IoT
smart and secure

Financials

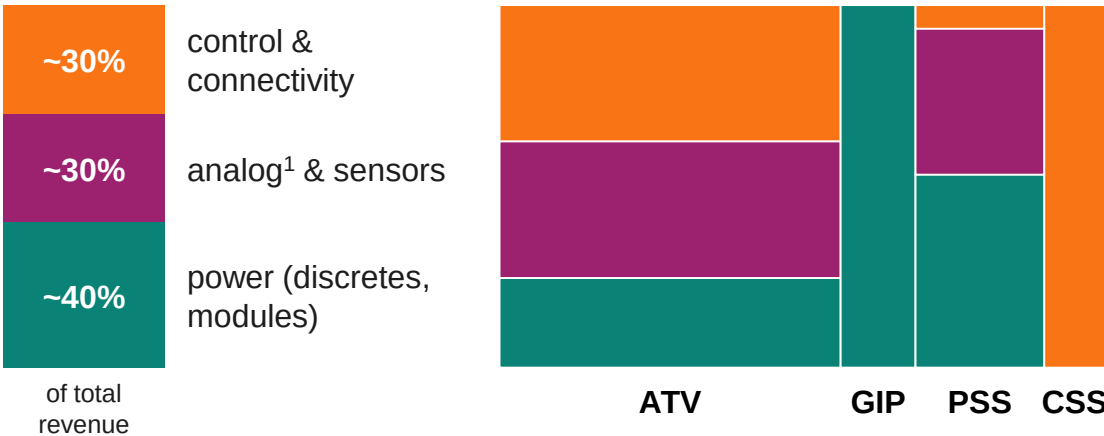


FY24 revenue by segment

- Automotive (ATV)
- Green Industrial Power (GIP)
- Power & Sensor Systems (PSS)
- Connected Secure Systems (CSS)



FY24 revenue by product category

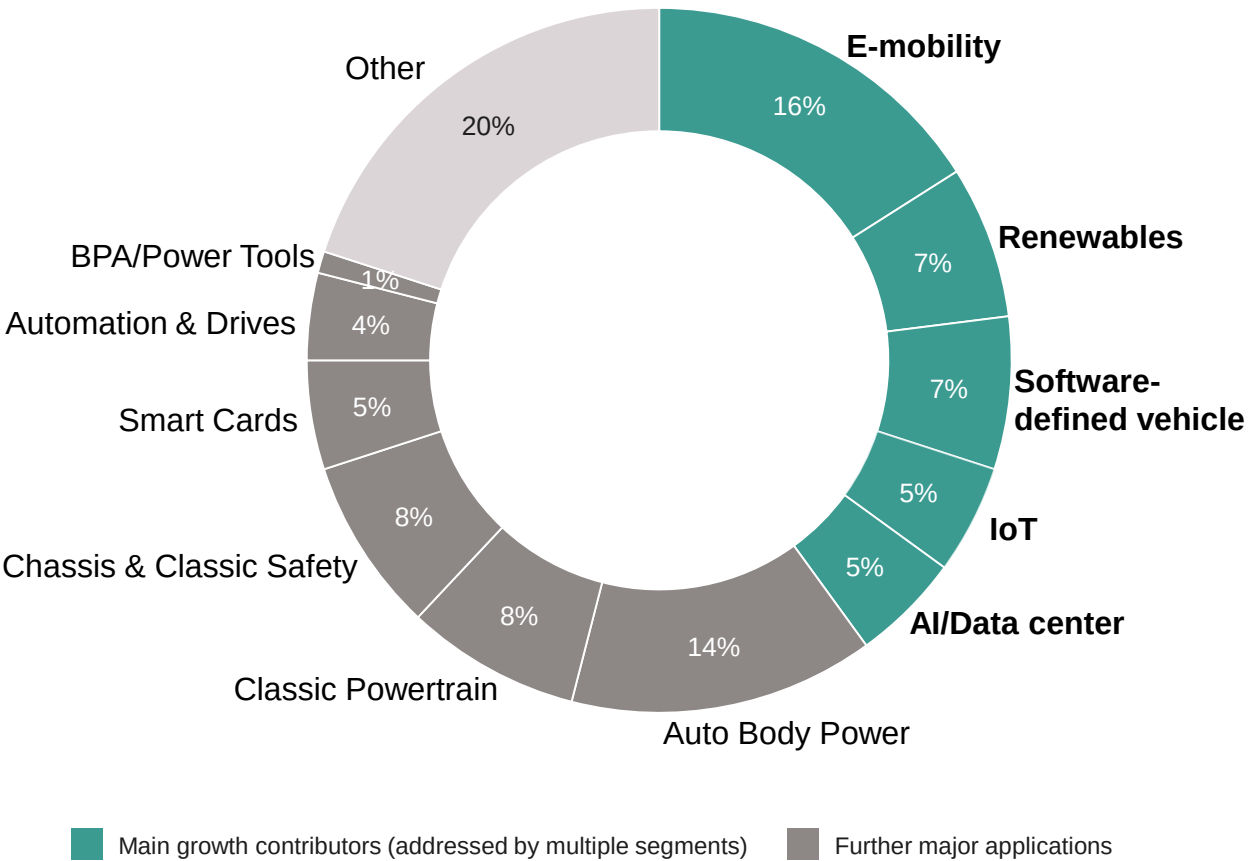
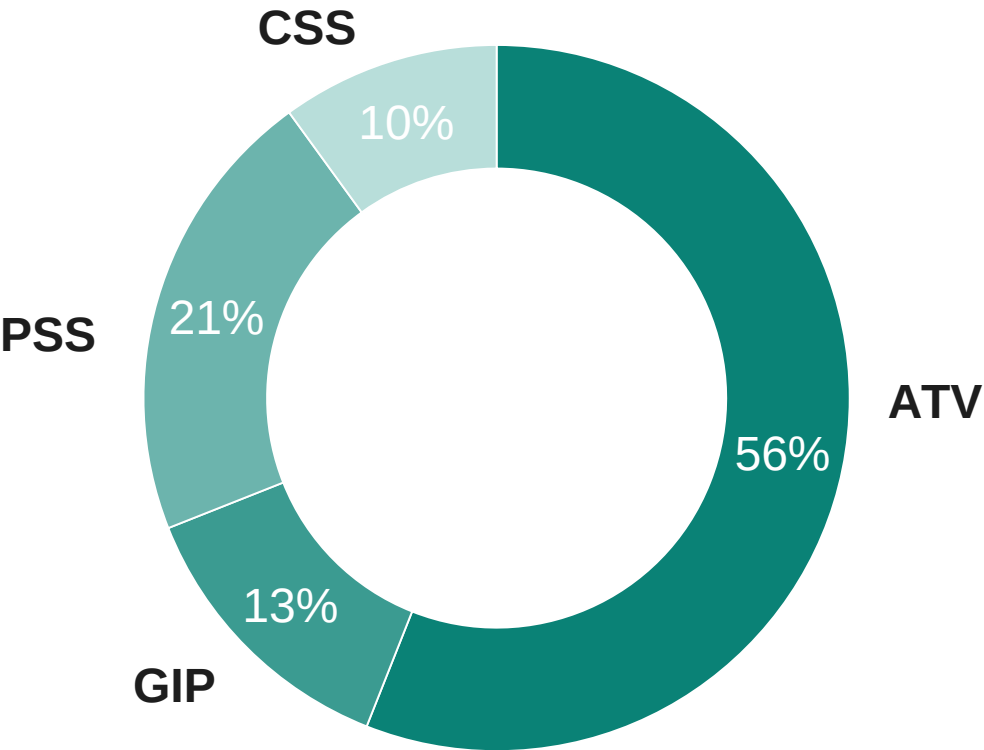


¹ including <5% of differentiating memory technologies

Well-balanced portfolio among segments and key applications, highest growth coming from Decarbonization and Digitalization



FY24 revenue of €14,955m by segment and key application

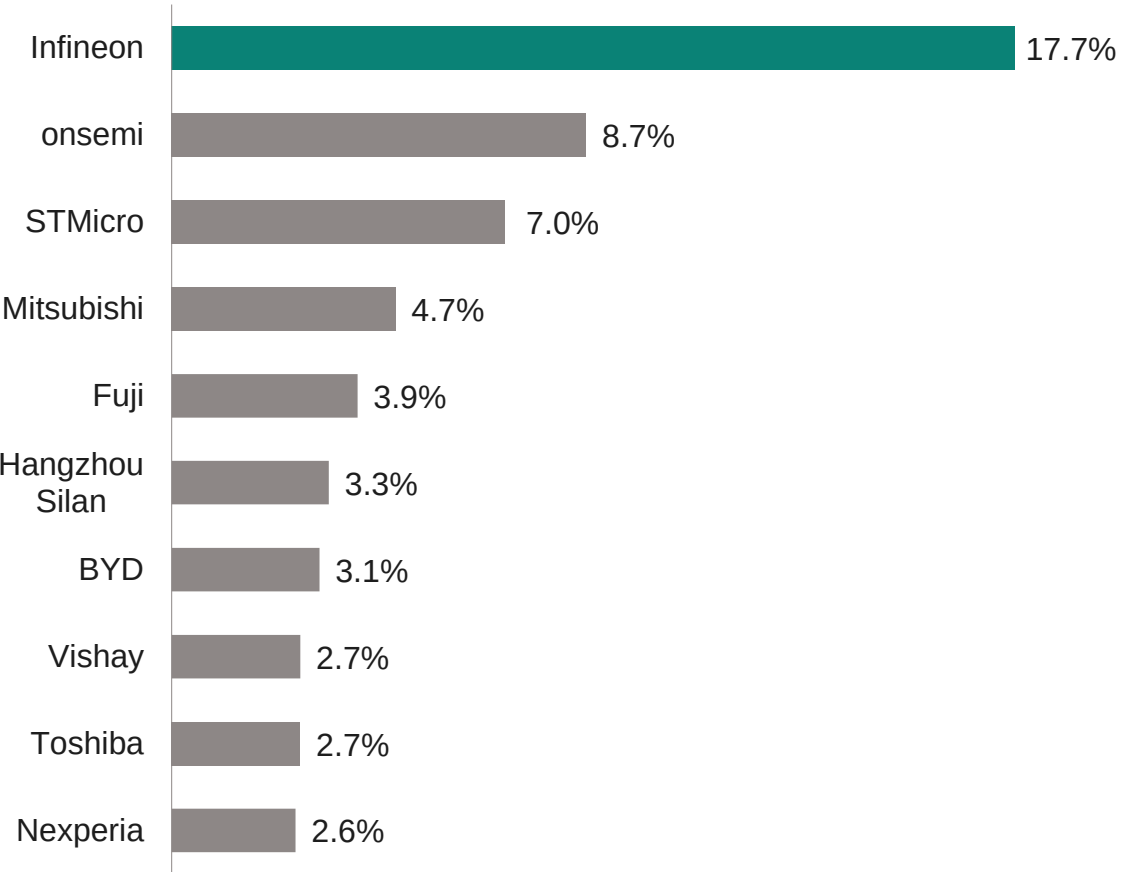


Infineon is a global player, clear #1 in power semiconductors, Automotive semis and automotive microcontroller markets



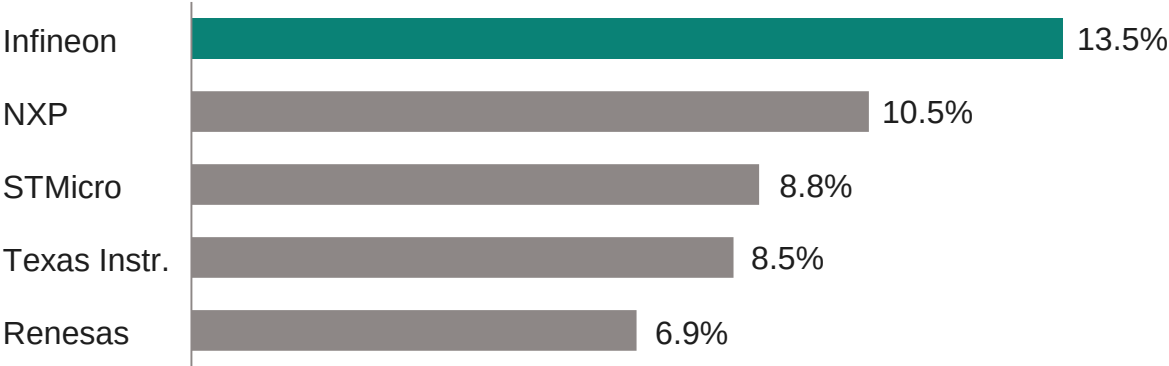
Power discretes and modules

2024 total global market: \$32.3bn¹

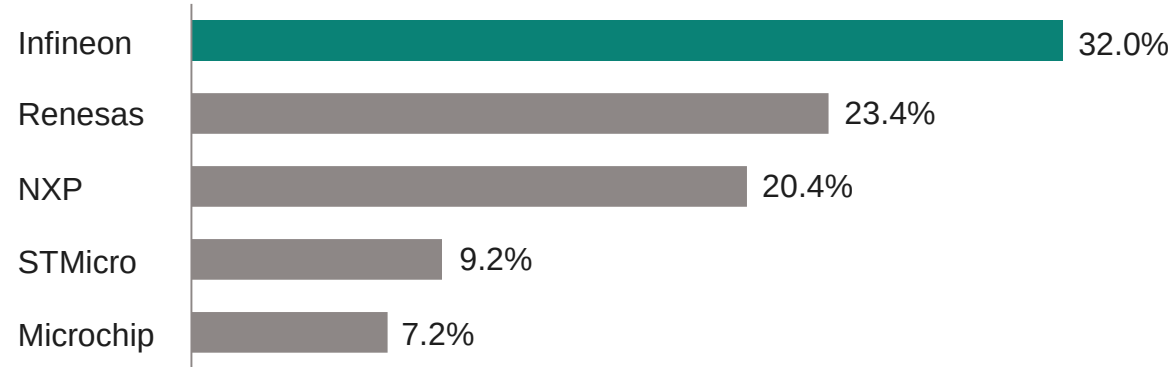


Automotive semiconductors

2024 total market: \$68.4bn²



Automotive MCUs



¹ Based on or includes research from Omdia: *Power Semiconductor Market Share Database – H125* (2024 Base Year). April 2025. | Results are not an endorsement of Infineon Technologies AG. Any reliance on these results is at the third party's own risk. ² Based on TechInsights: *Automotive Semiconductor Vendor Market Shares*. March 2025.

Our Target Operating Model: committing to ambitious financial goals and being the sustainability leader



Target Operating Model through cycle



Revenue growth

>10%



Segment Result Margin

25%



Adj. Free Cash
Flow Margin¹

10-15%

Sustainability leader
CO₂ neutrality 2030

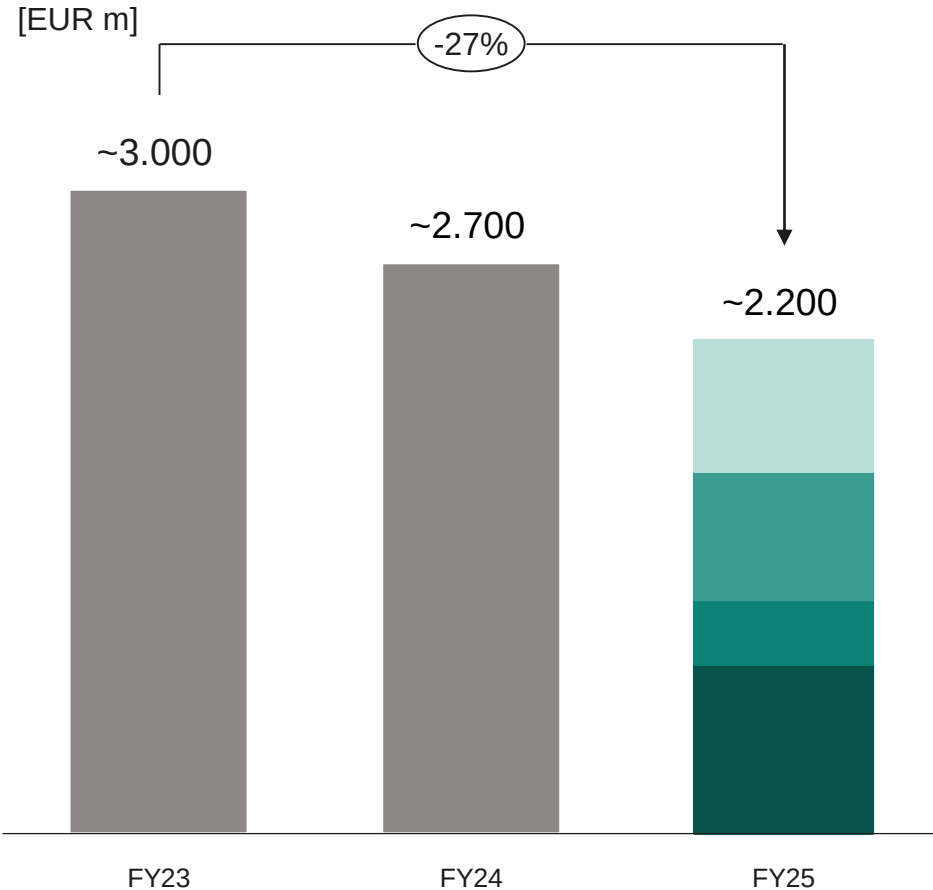


¹ Excluding major frontend buildings



Modular investment approach allows ramp-up in line with market demand to ensure long-term value creation

Infineon investments¹ FY 23-25



Strategic investments – shell construction

- Dresden M4

Capacity investments – key growth areas

- SiC/GaN: transition to 200 mm/300 mm
- Smart power and logic: enabling further growth for "powering AI" and analog/mixed-signal products

Research and development

- IFRS capitalization of development cost

Basic investments

- Maintenance, process optimization, quality, IT

¹ Investments are defined as the total amount invested in property, plant and equipment and in other intangible assets, including capitalized development costs

Outlook for Q4 FY25 and FY25

	Outlook Q4 FY25¹	Outlook FY25¹
Revenue	~€3.9bn	~€14.6bn
Adj. Gross Margin		at least 40%
Segment Result Margin	high-teens %	high-teens %
FCF		~€1.0bn / ~€-1.2bn ²
Adj. FCF		~€1.7bn
Investments		~€2.2bn
D&A		~€1.9bn ³

¹ Based on an assumed average exchange rate of \$1.15 for €1.00

² Considering the upcoming completion of the acquisition of the Automotive Ethernet business of Marvell Technology, Inc, USA

³ Including the amortization of approximately 400 million Euros from purchase price allocations

Undisputed power systems leadership mastering all three key materials

- » Reliable multi sourcing of raw materials
- » World-scale fabs



- » Application understanding
- » Packaging know-how and hybridization competence

Leadership in Power Systems across all materials and technologies

Silicon

Diode – MOSFET – IGBT – Driver – Controller



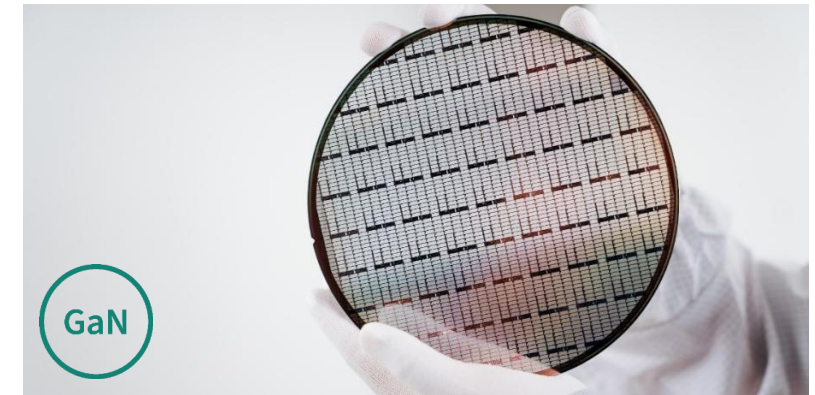
Silicon carbide

Diode – MOSFET



Gallium nitride

HEMT – Driver



Infiniteon is the leader across all power semiconductor technologies

– unparalleled portfolio and know-how



World's thinnest silicon power wafer with 20 µm on 300 mm

- Broadest Si-power portfolio in the market
- Unmatched quality and leading in all figures of merit (FOM)
- Best price/performance ratio



World's most competitive 200 mm silicon carbide power fab

- Broadest portfolio covering auto and industrial applications
- Leading trench performance
- High reliability and robustness in extreme conditions
- Smaller system size



World's first 300 mm gallium nitride power wafer

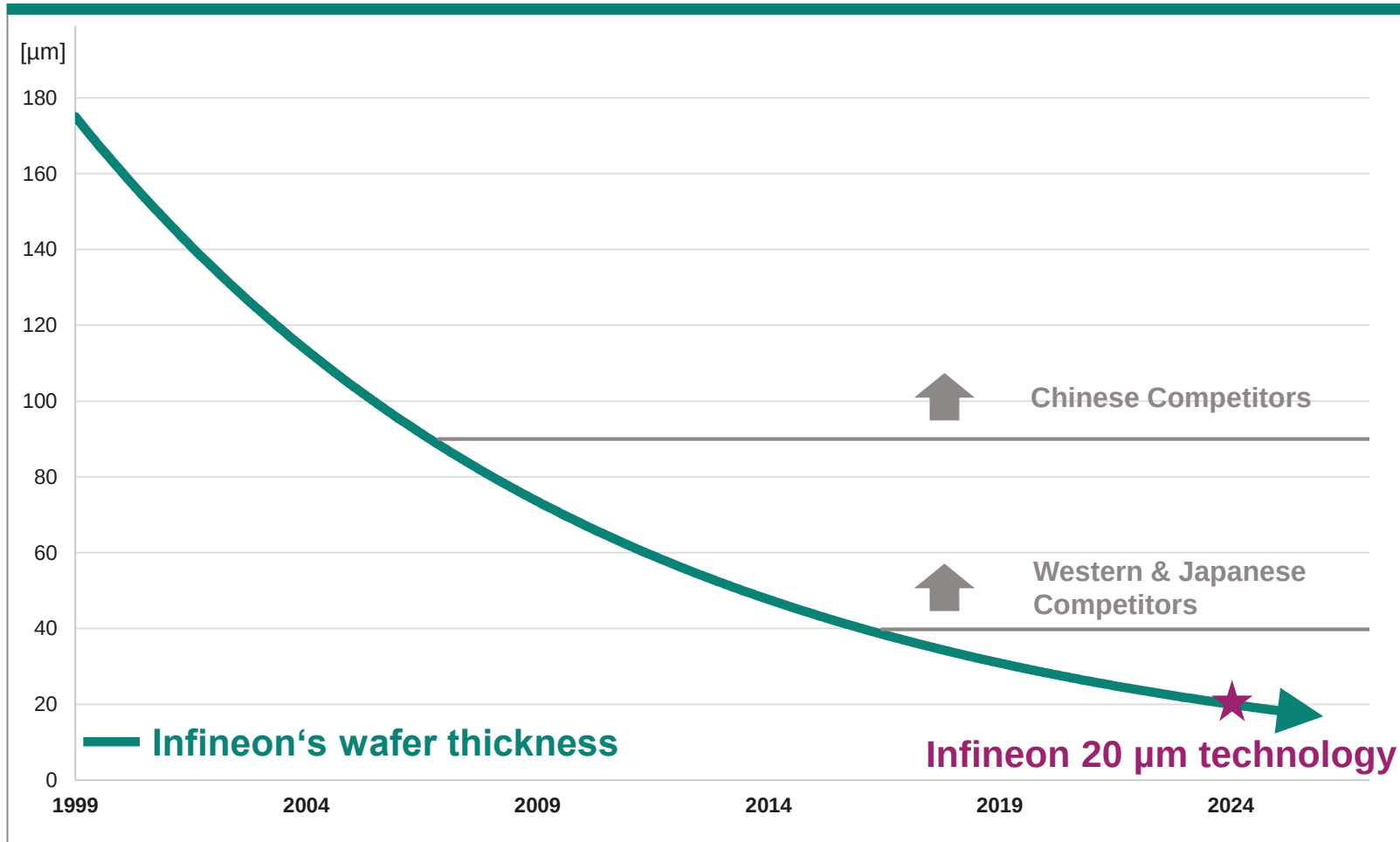
- Enabling cost parity with silicon
- Highest efficiency at the highest frequency enabling smallest system size
- Allow functional integration



**Infiniteon is strengthening its position as the industry's innovation leader
leading the way in all three power semiconductor materials**

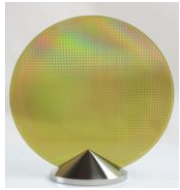
Infineon presents the world's thinnest silicon power wafer paving the way for more energy efficient power systems

Infineon reduces wafer thickness from 40 μm to 20 μm



- Infineon pioneers 20 μm process at high-scale production
- Halving thickness also halves resistance, reducing power loss by >15%
- Enables easy and robust signal routing from front to backside
- Technology qualified by customers and applied in Infineon's Integrated Smart Power Stages for DC-DC converter in AI servers

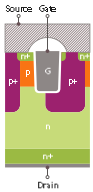
With opening Kulim 3, Infineon is on track to becoming the industry's most competitive provider of SiC technology



SiC raw material supplier network



- More than 6 qualified SiC wafer and boule suppliers
- Globally diversified and resilient



Superior trench technology



- 30% more chips per wafer than planar
- Unmatched reliability with zero field returns



Packaging portfolio



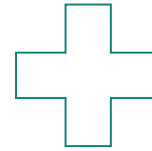
- Best-in-class in-house packaging solutions
- .XT technology for highest power density



Deep system understanding



- Decades of experience
- Broadest portfolio: off-the-shelf plus customized solutions



Most competitive 200 mm fab with industry-leading cost position.
Resilient setup together with Villach plant

Smart phase-over and ramp-up of 200mm volume production to enable next level of innovation for customer value with SiC

Villach


Kulim



CoolSiC™
200 mm

Pilot projects on track

- Qualification on selected high-volume technologies nearly finished
- SiC multi-sourcing strategy for raw materials in place
- Wafer yield equal or better to 150 mm

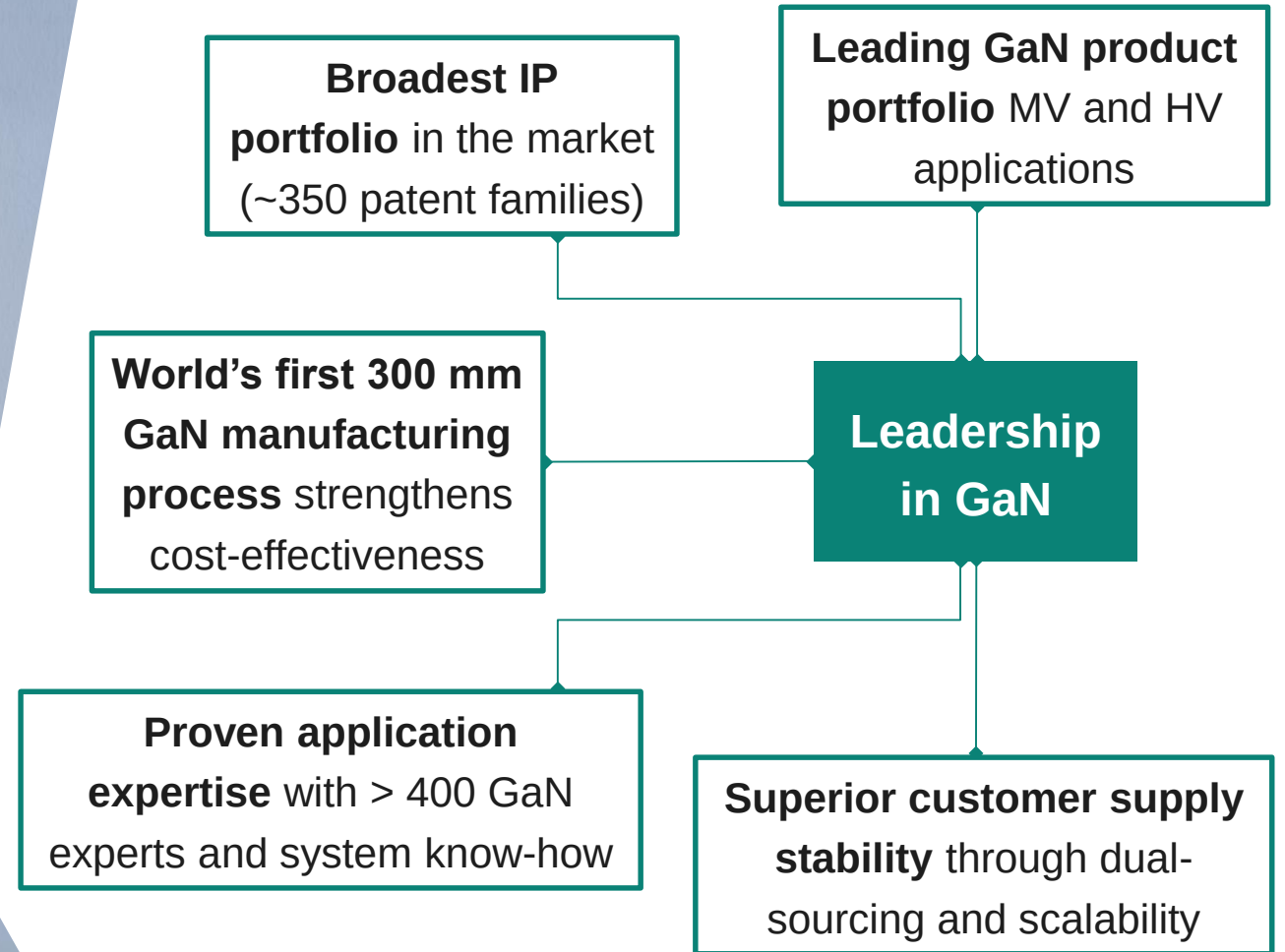
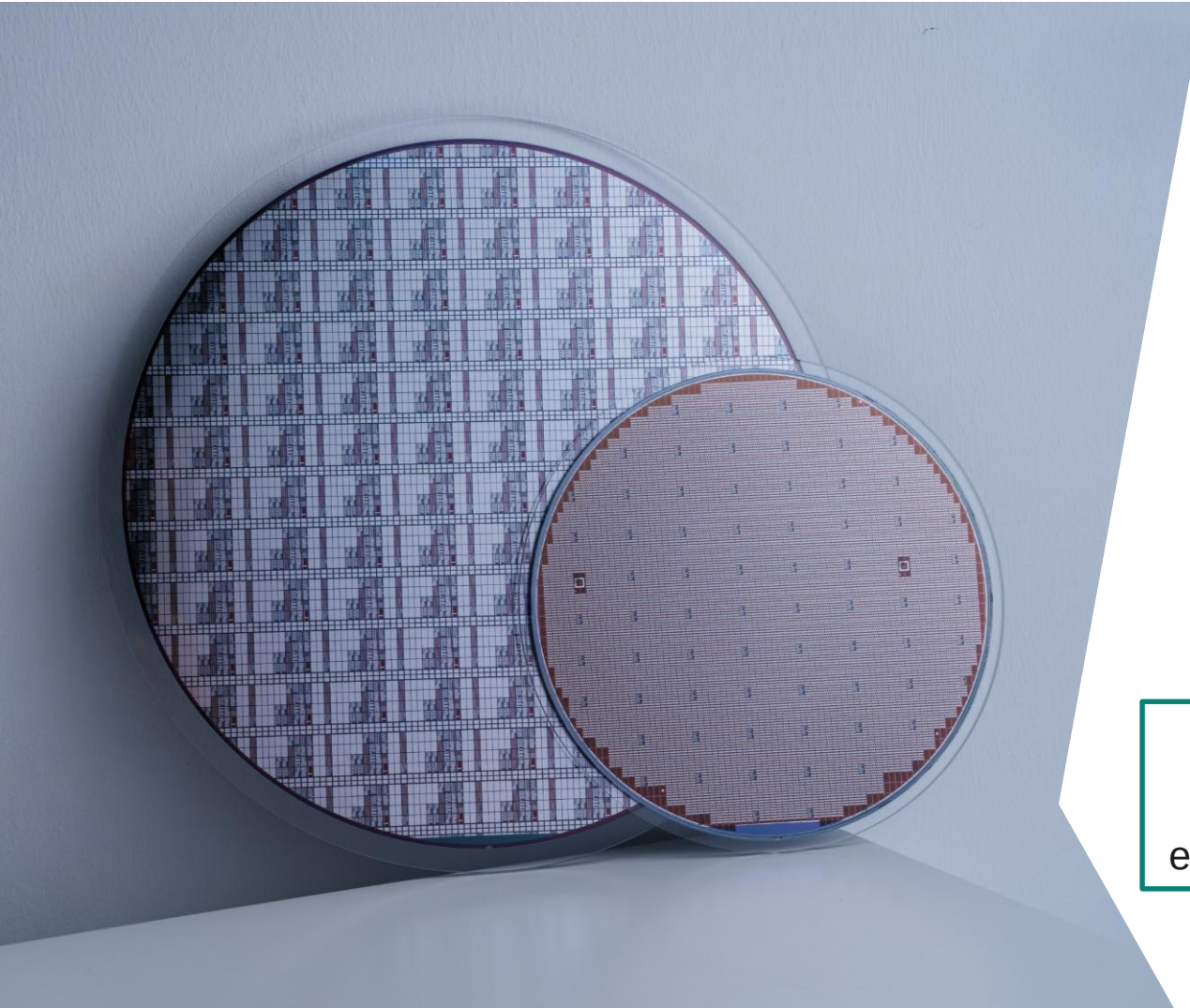
Smart 200 mm phase-over

- Volume production in Villach and Kulim
- Cleanroom and tools already available
- Full transition to 200 mm planned within 3 years after qualification

Timeline

- Product roll-out based on 200 mm starting Q1 CY25
- Major new chip developments on 200 mm

Infiniteon is a leader in GaN technology and can build on the industry's broadest IP portfolio and application expertise





Infiniteon at the core of IoT – driving digitalization by serving strongly growing multi-application markets



Consumer IoT



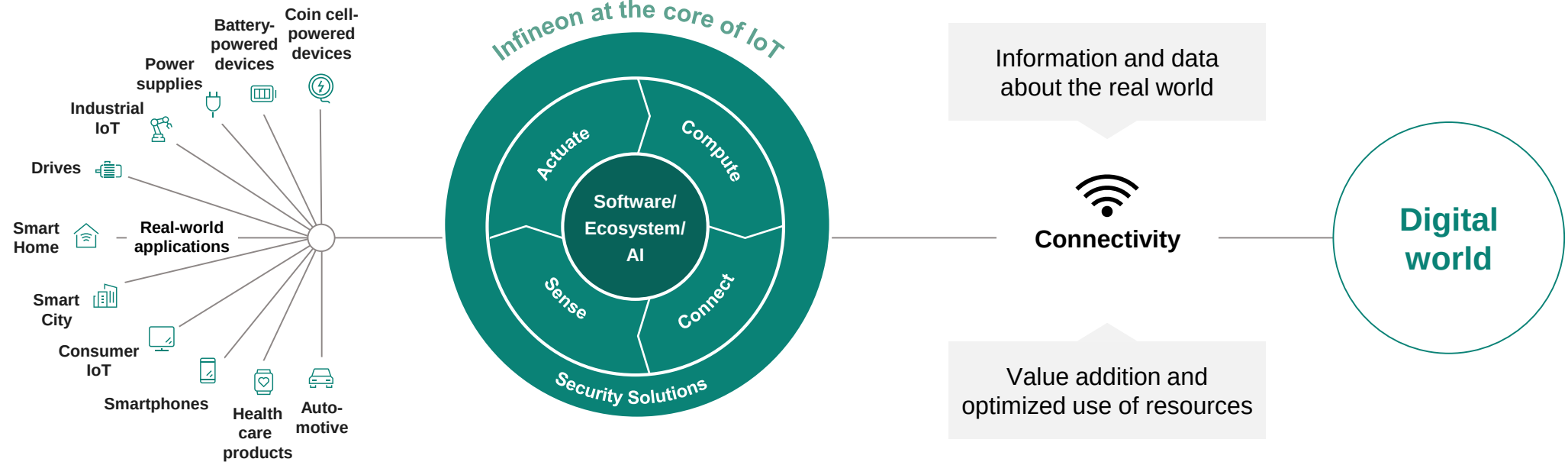
Industrial IoT



Automotive IoT



Products: MCU – Connectivity (Wi-Fi, BLE, NFC) – Sensors – Security – Power supply & switches



ESG: Targets and achievements



Important milestone achieved: The Science Based Targets initiative (SBTi) has approved our CO₂ emission reduction targets

SBTi validation of Infineon's 2030 CO₂ reduction targets marks a major step in our decarbonization journey

- **Scope 1 and 2 targets align with the Paris Agreement, limiting global warming to 1.5°C**
Specifically, Infineon has committed towards SBTi to **reduce** absolute Scope 1 and 2 greenhouse gas (GHG) emissions by 72.5% by 2030 versus the base year 2019.
- **New Scope 3 commitment:** 72.5% of supplier emissions to be covered by science-based targets by 2029.
- **Key reduction measures** include green electricity, energy efficiency, and voluntary GHG abatement.
- Infineon remains committed to 100% CO₂ neutrality goal in Scope 1 and 2 by 2030, as announced back in 2020
This will include compensation for the smaller part that cannot be reduced



Our 2030 carbon neutrality goal is aligned with the Paris Climate Agreement's 1.5°C target



CO₂ burden¹

2.9 million tons of CO₂ equivalents



Ratio
~1:45

CO₂ savings²

130 million tons of CO₂ equivalents

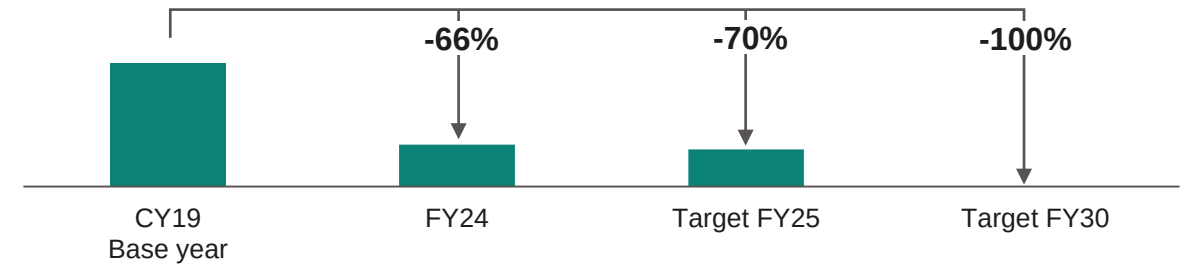


On the road to carbon neutrality³ we achieved significant milestones by

- Using green electricity in Europe and North America and our main sites Kulim and Melaka in Malaysia

Infineon's CO₂ target³ by 2025 and 2030

Net CO₂ emissions in million tons of CO₂ equivalents



» Net ecological benefit: CO₂ emissions reduction of more than 127 million tons

^{1,2,3} For further explanation see "ESG footnotes" in the appendix

External recognitions confirm our engagement in contributing to a sustainable society



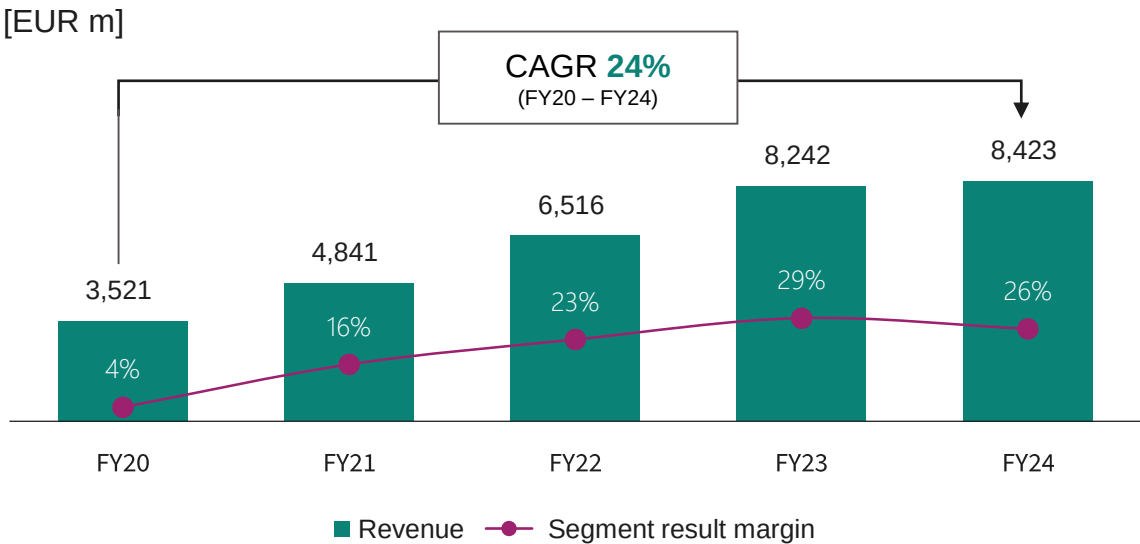
	Rating/Score	Scale	Date
 MSCI ESG	AAA	CCC to AAA	05/2025
 CDP	B climate scoring B water scoring	F to A	02/2025
 Ecovadis	99th percentile “Platinum” award	0 to 100	06/2024
 Dow Jones Sustainability™ Index In collaboration with 	76 Dow Jones Sustainability™ World Index listing	0 to 100	12/2024
 ISS ESG Corporate Rating	Prime Status	—	03/2025
 FTSE4Good Index	Index member	—	07/2025
 Sustainalytics	ESG industry top performer	—	01/2025

Automotive

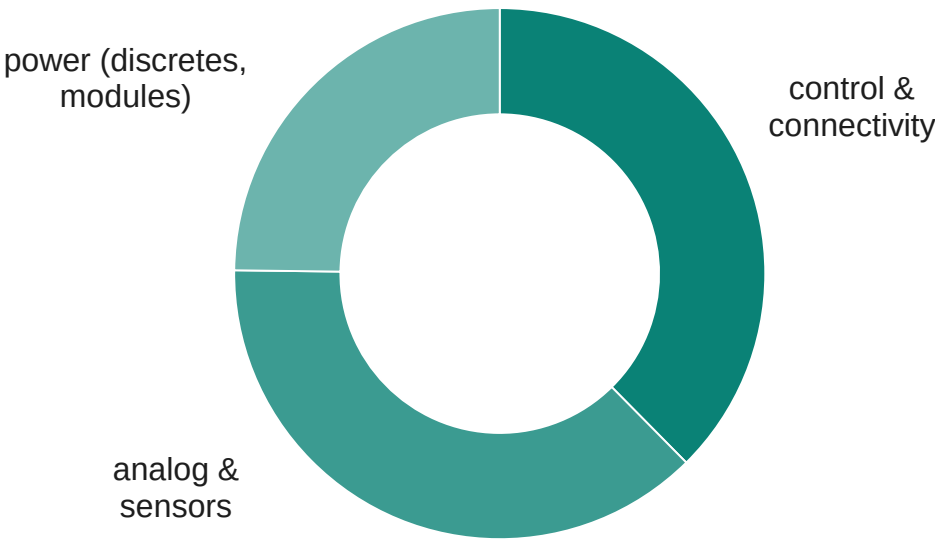


ATV at a glance

ATV revenue and Segment Result Margin



FY24 revenue split by product group



Key customers

Shift of EV growth and lower momentum of car production

Applications

Market outlook for CY25



Automotive



- In CY25 car demand is assumed to be flattish. However, tariffs and trade tensions pose a risk for additional volume loss.
- While LV production in China is forecasted to increase, North America and Europe output will decline.
- Further market share growth of local OEMs in China.



E-mobility



- Further advancement of xEV in CY25 expected driven by strong momentum in China. However, xEV production will be still impacted by weak consumer demand and platform delays.
- Recovery of xEV sales in EU after a flat development in 2024.
- US administration will likely slow down BEV adoption in the US.



Software-defined vehicle

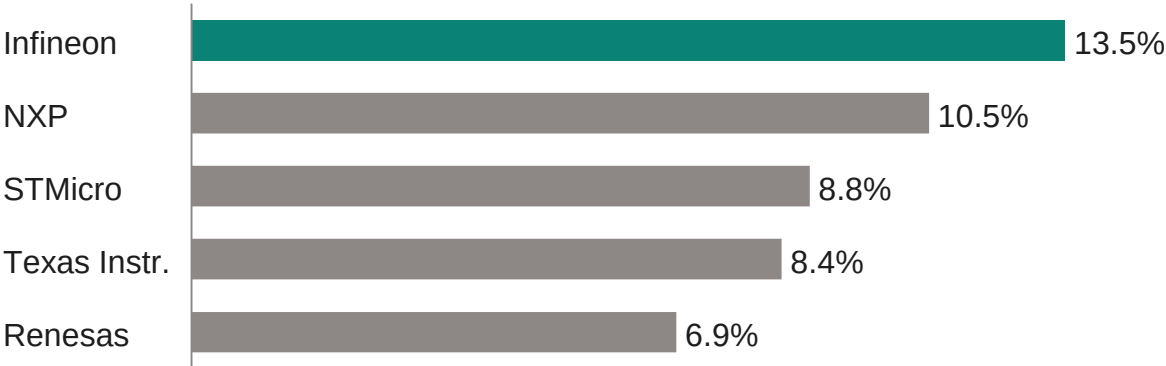


- Further growth of higher ADAS/AD levels especially in China. Major volume growth will be in Level 2 and Level 2+.
- Further robotaxi projects launched in the US and in China.

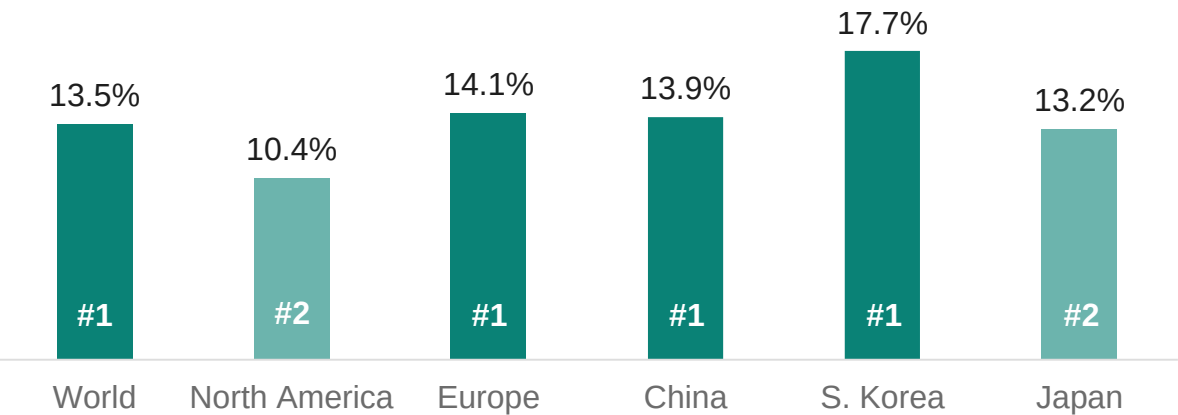
Infiniteon's top market position is built on system competence based on an industry-leading product portfolio



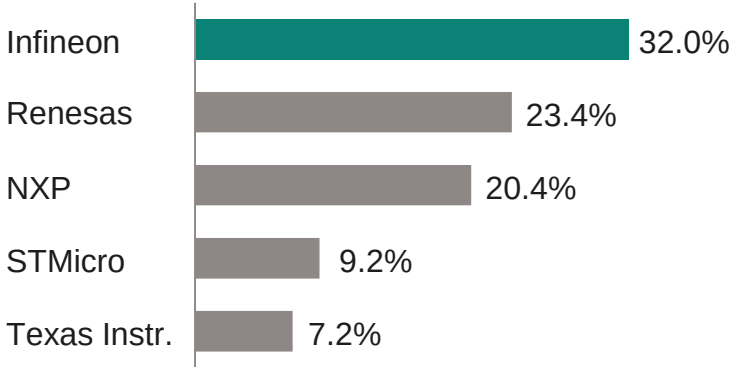
Automotive semiconductors (2024 total market: \$68,382m; -1.2% y-y)



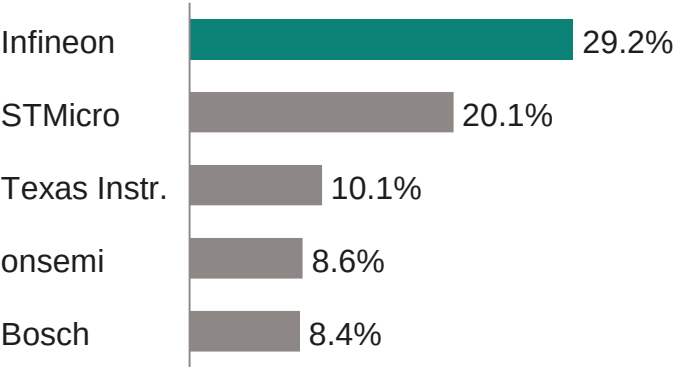
Infineon's 2024 market share and position by region



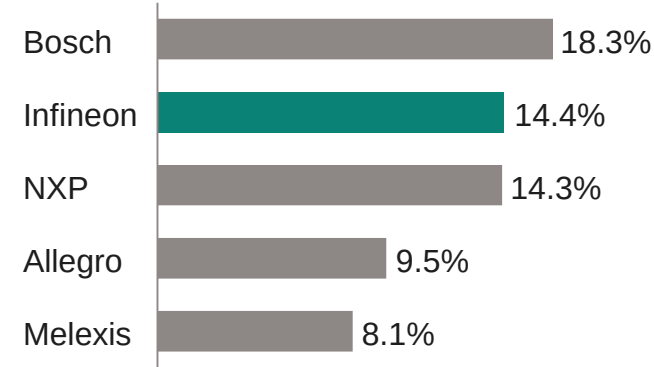
MCUs



Power semiconductors



Sensors



TechInsights: Automotive Semiconductor Vendor Market Shares. March 2025. Sensors: S&P Global Mobility: Automotive Semiconductor Market Share Database. May 2025.

Several strong content growth drivers for Infineon in xEV and software-defined vehicles, even at flat LV production

Structural trends fueling our growth

xEV

- Strong volume growth of BEVs and PHEVs
- Increasing share of SiC in traction inverters
- More kW per vehicle lead to higher BoM in inverter

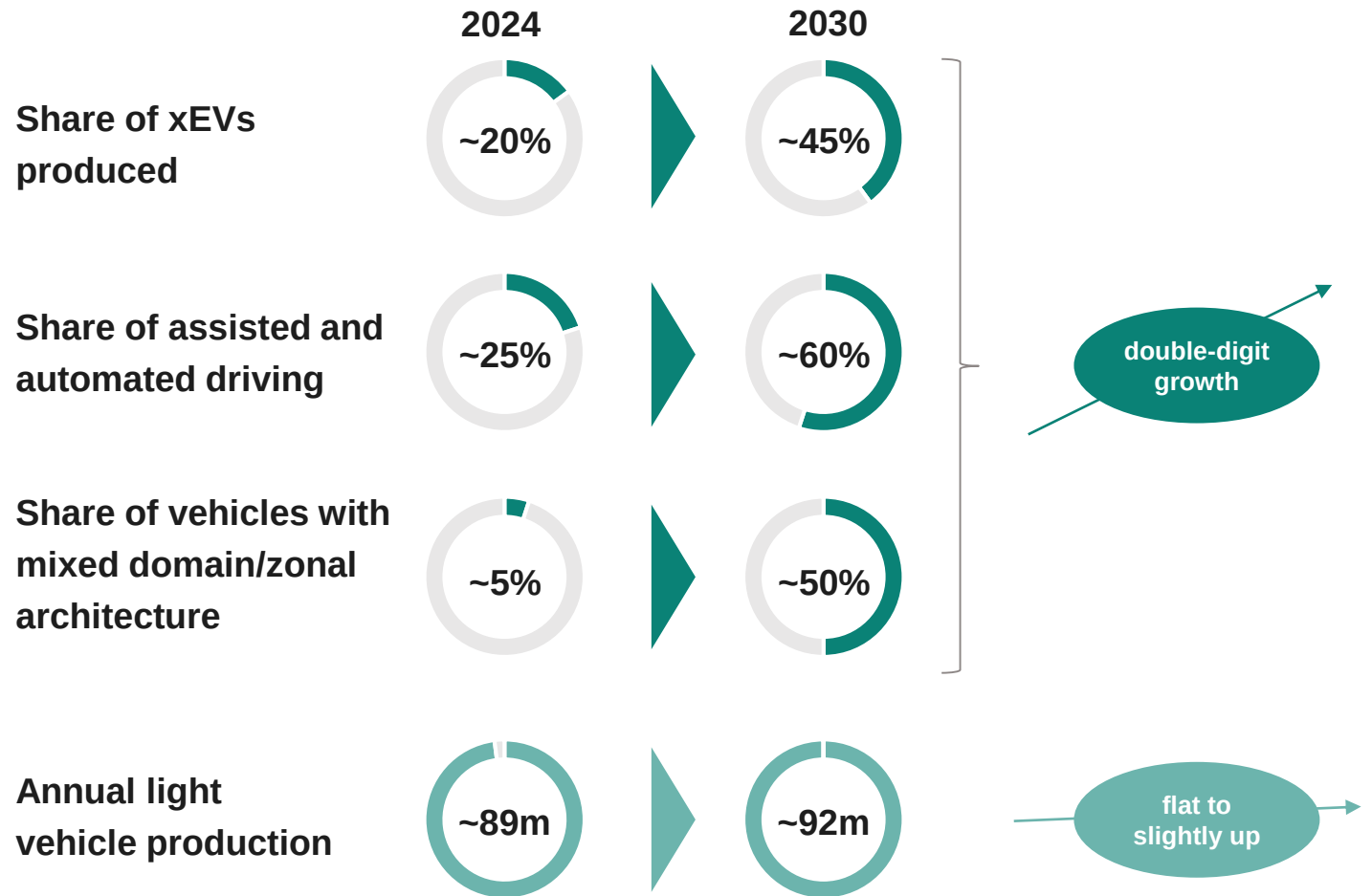
SDV

- Transformation of E/E architecture towards central computing with zonal controllers
- Smart switches for decentralized power distribution
- Software over the air
- Secure connectivity, cybersecurity indispensable
- Functional safety, dependable electronics, redundancy
- ADAS/AD: More sensors, more computing performance

Comfort and premium features

- More loads (motors, heating, cooling etc.)
- More elaborate lighting, both exterior (matrix light) and interior (instruments and ceiling)

Overview of growth vectors until 2030

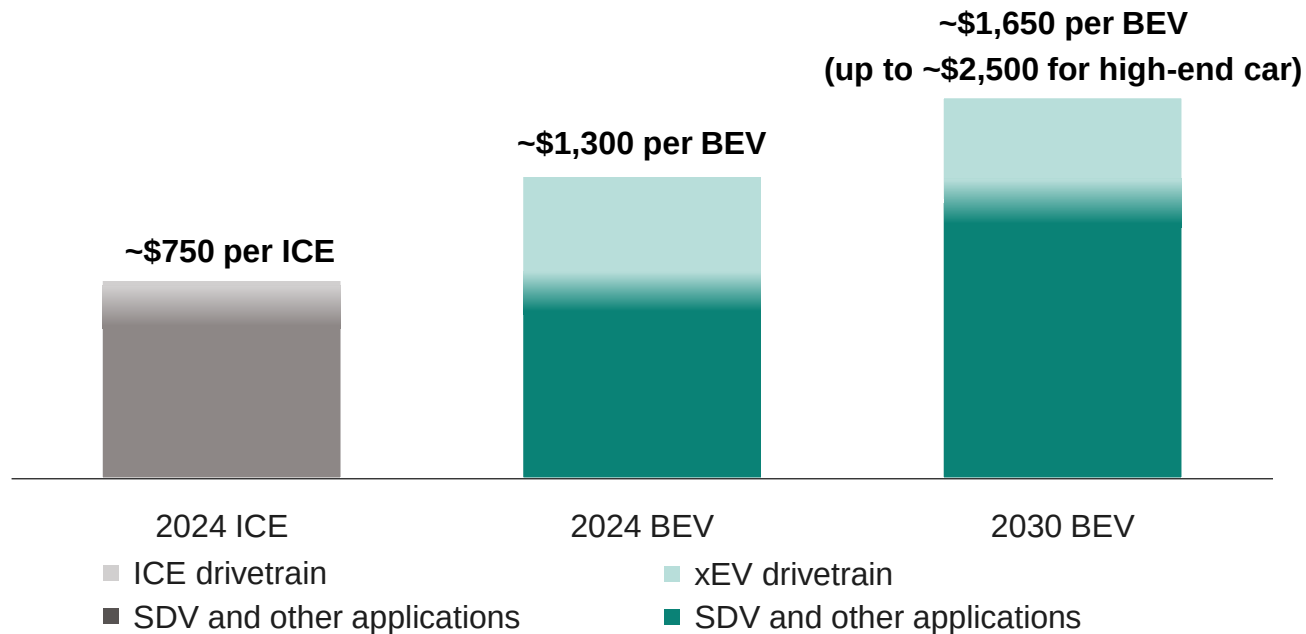


Infineon estimates

Infiniteon is the world leader in automotive semis, serving all key applications and benefiting strongly from content growth



Average semiconductor bill-of-material per car in 2024 and 2030



Semiconductors covered by Infineon

Drivetrain applications:

- Traction inverter, OBC, DC-DC, BMS, auxiliaries
- Drivers for BoM increase:
 - SiC and GaN replacing Si
 - more motors and stronger motors per car
 - slight increase in kW per car

SDV and other non-drivetrain applications:

- Domain/Zone
- SDV, incl. E/E architecture and ADAS
- Safety and advanced security
- Comfort and premium
- Connectivity and infotainment

BEV market size growth (vehicle production)



With a growing xEV market and growing non-drivetrain BoM, Infineon profits twice

Infineon estimate based on S&P Automotive Semiconductor Tracker - September 2024; October 2024

A very broad portfolio with >300 product families is backing the market leadership of Infineon in Automotive



Infineon ATV division revenue by product families:



Major categories¹: AURIX™ families, CoolSiC™, IGBT 750V, IGBT 1200V, MOSFETs, PROFET™, Radar, TRAVEO™ – none more than ~10%

Unmatched customer value creation and portfolio resilience

Leading technologies

System competence (P2S)

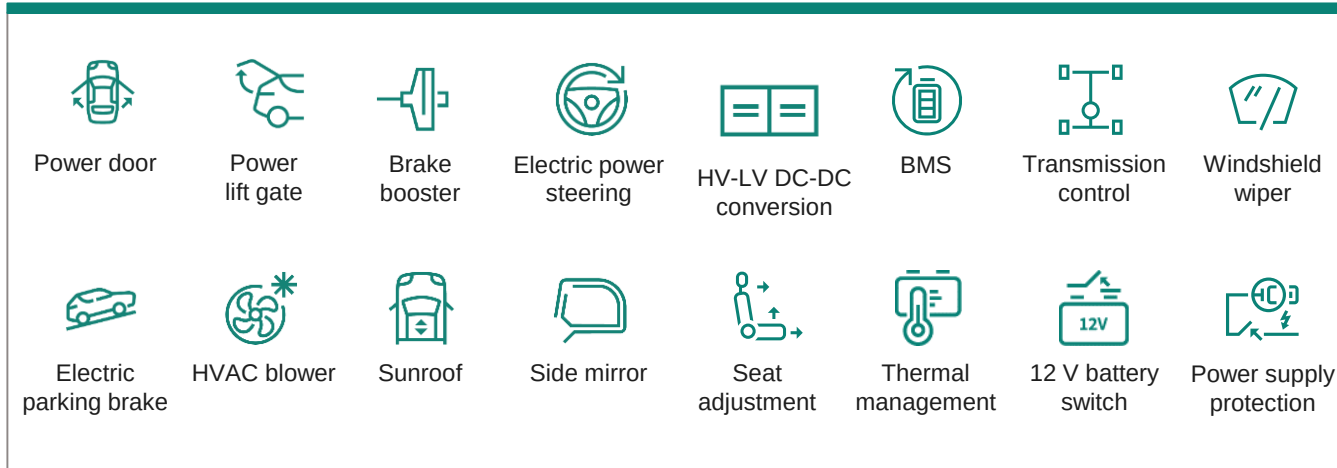
Broadest portfolio

¹ In alphabetical order

Number of power MOSFETs per car continues to increase, and drives accelerated growth for the leading portfolio

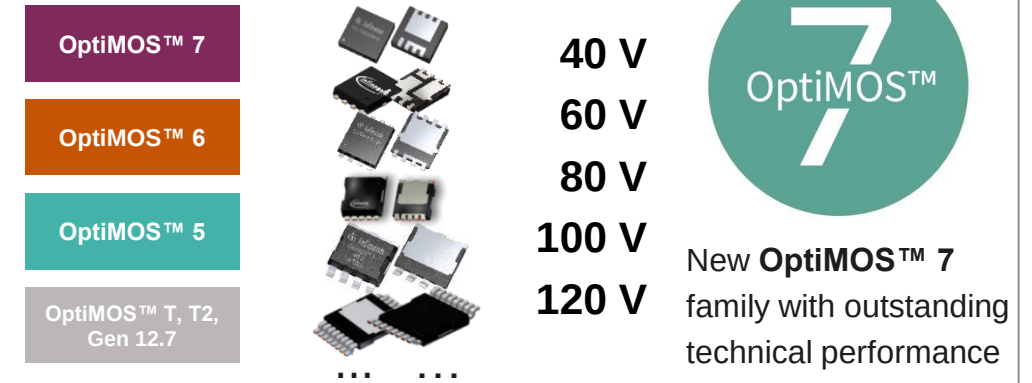


Examples of MOSFET applications



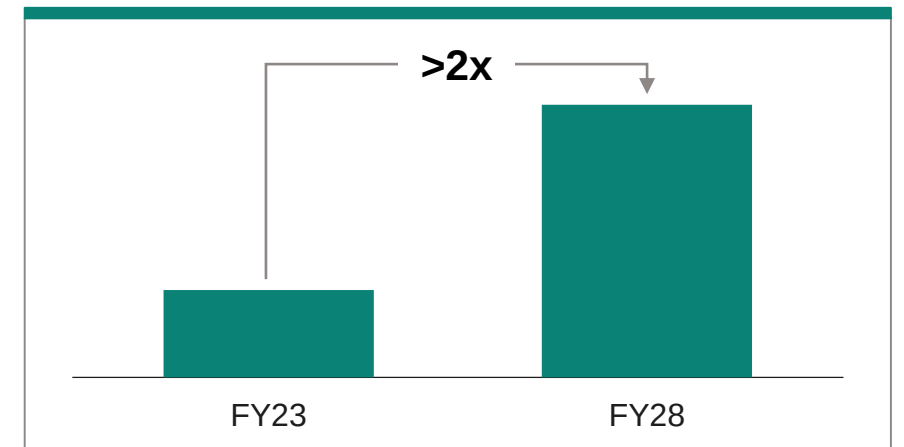
Latest portfolio with constant innovation

Technologies, packages and voltages



- 100 to 180 MOSFETs are used per vehicle in ~90 different applications in all segments: body, chassis, safety, ADAS/AD, powertrain
- Infineon offers broadest portfolio (>600 products) and eco-system to address specific and high-margin applications:
 - embedded control, gate driver, MOSFETs, software, P2S
 - entire eco-system with digital twins
 - simulation environment (esp. for motor control)

Infineon's revenue growth

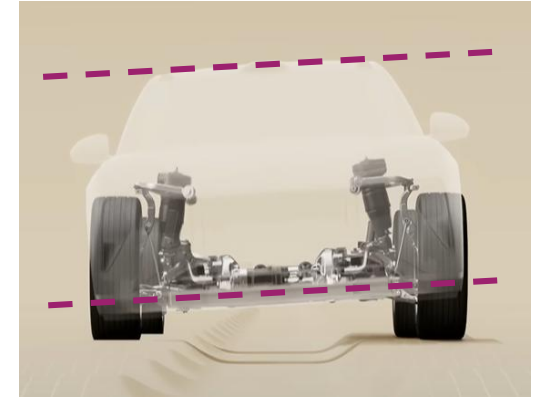


Outstanding electrical characteristics of Infineon products drive innovations, e.g. most advanced active suspension system



World-class active suspension system developed by ClearMotion

- Designed for 48-Volt high-current application
- Currently featured exclusively in luxury vehicles
- Referred as “flying carpet” for its seamless, flow-like driving experience



passive suspension system

Powered by Infineon's leading solutions in analog, power, and real-time technologies



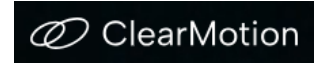
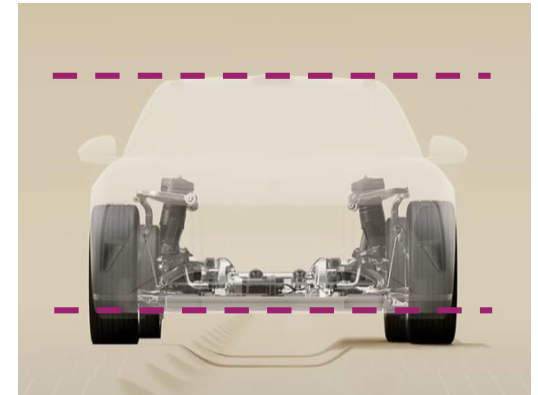
OPTIREG™ PMIC



OptiMOS™ 5, 80 V, 1.2 mΩ
world-class low R_{DSon}



AURIX™ TC366



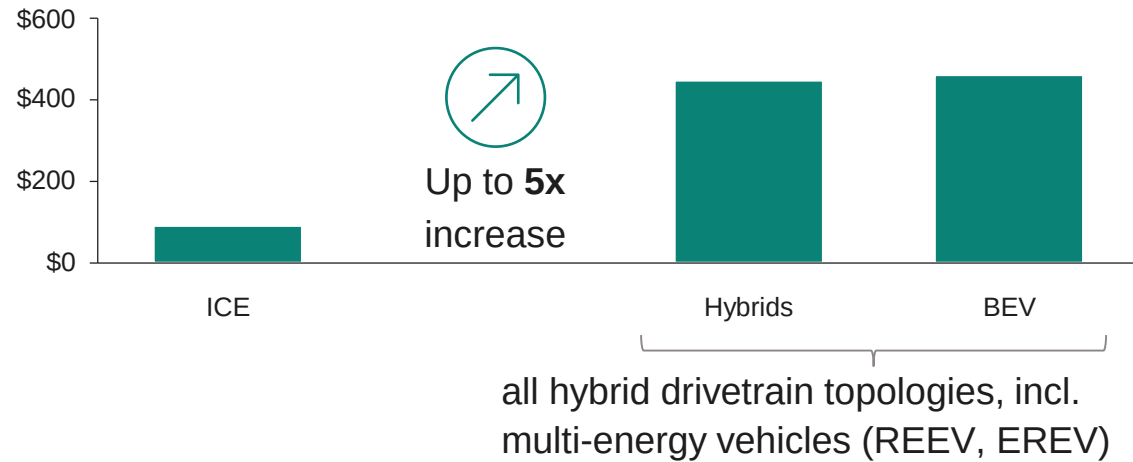
active suspension system

Electromobility



xEV is a strong content growth driver for Infineon, even at flat LV production

Power semi content per vehicle for drivetrain only



Addressing further electric drivetrain end-markets



REEVs / EREVs



eTrucks



2/3-eWheelers

Based on S&P Automotive Semiconductor Tracker - September 2024. Infineon, October 2024

Infineon's power semiconductor offering

- Only player offering Si, SiC and GaN
- Addressing traction inverter, OBC, DC-DC converter, BMS, aux.
- Fusion modules seamlessly combine Si and SiC
- Technology leader in all three technology fields:



World's thinnest silicon power wafer
with 20 μm on 300 mm



World's most competitive 200 mm SiC power fab



World's first 300 mm GaN power wafer

Infineon has the right power semiconductor solution for all drivetrain applications in any drivetrain topology

Several design-wins at BYD for MCUs, PMICs, MOSFETs and sensors covering zone control units and steering applications



Supporting the latest car models of China's #1 NEV OEM with our broad range of leading semiconductors



TRAVEO™ MCUs



AURIX™ MCUs



Voltage regulators



PROFET™ family



OptiMOS™ 7 MOSFETs



TMR-based angle sensor

Body zone control unit



Seal 07 EV

Electric power steering



Seal U DMi

Rear wheel power steering

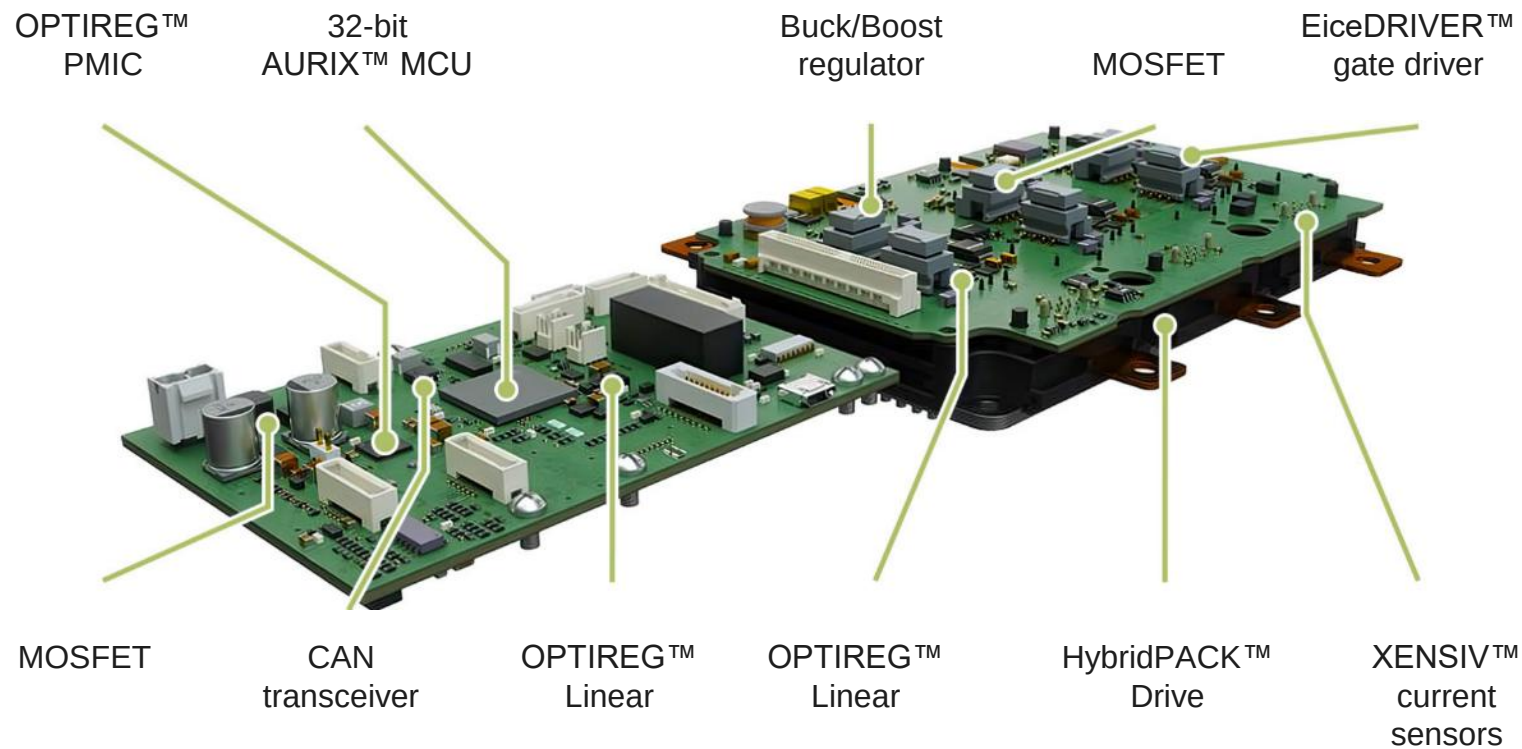


Denza Z9GT

Infiniteon's broad product portfolio and system understanding enable higher BoM and allows for compact designs and fast T2M



Infineon inverter reference design, covering up to 95% of value



P2S (product-to-system approach)

- Reference design for up to 300 kW, further customization possible
- System solution for easy implementation
- Fast time-to-market (T2M)

Freedom of choice

- IGBT and SiC in 750/1,200 V scale up to preferred power class
- HybridPACK™ Drive CoolSiC™ Gen2 continuous operation at 175°C
- EiceDRIVER™ gate driver Gen3 optimized for CoolSiC™
- Optimized 32-bit AURIX™ MCU

Competitive setup, unmatched portfolio breadth and our worldwide customer base lead to accelerated growth in SiC



Leading SiC technology and production efficiency

- Unrivaled productivity with most competitive fab and most diversified supplier network
- Superior trench technology and highest reliability
- Extensive packaging portfolio and complete system competence

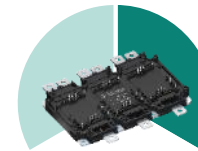


Most scalable SiC auto portfolio

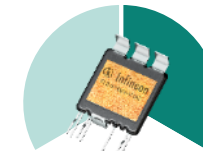
650 V

750 V

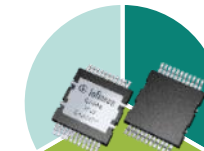
1,200 V



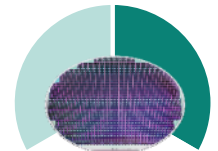
Module



DSC/SSC module



Discrete



Bare die

Continued strong SiC design-win momentum



Infineon AURIX™ TC4x with integrated PPU brings AI-on-the-edge to the battery



Battery cost

Battery health

Charging speed

Safety concerns

Range anxiety

**Resale value,
residual value**

**Cloud dependencies
(latency, cost, stability)**

AURIX™ TC4x

PPU

(parallel processing unit)



High computing performance with complex and accurate BMS algorithms

- AI-based battery diagnostic on-the-edge
- temperature model, electro-chemical model
- lithium plating detection
- remaining useful life prediction
- with and without cloud-based updates
- Product-to-System!

Efficient battery cell utilization

- Higher capacity
- Less cells
- Lower battery cost

Faster charging

- Higher user experience

Assure longevity, extended guarantee

- Longer lifetime (in years, in km)
- More charging cycles

Detect and prevent thermal runaway

Accurate battery, health prediction

» **Trust in resale market**

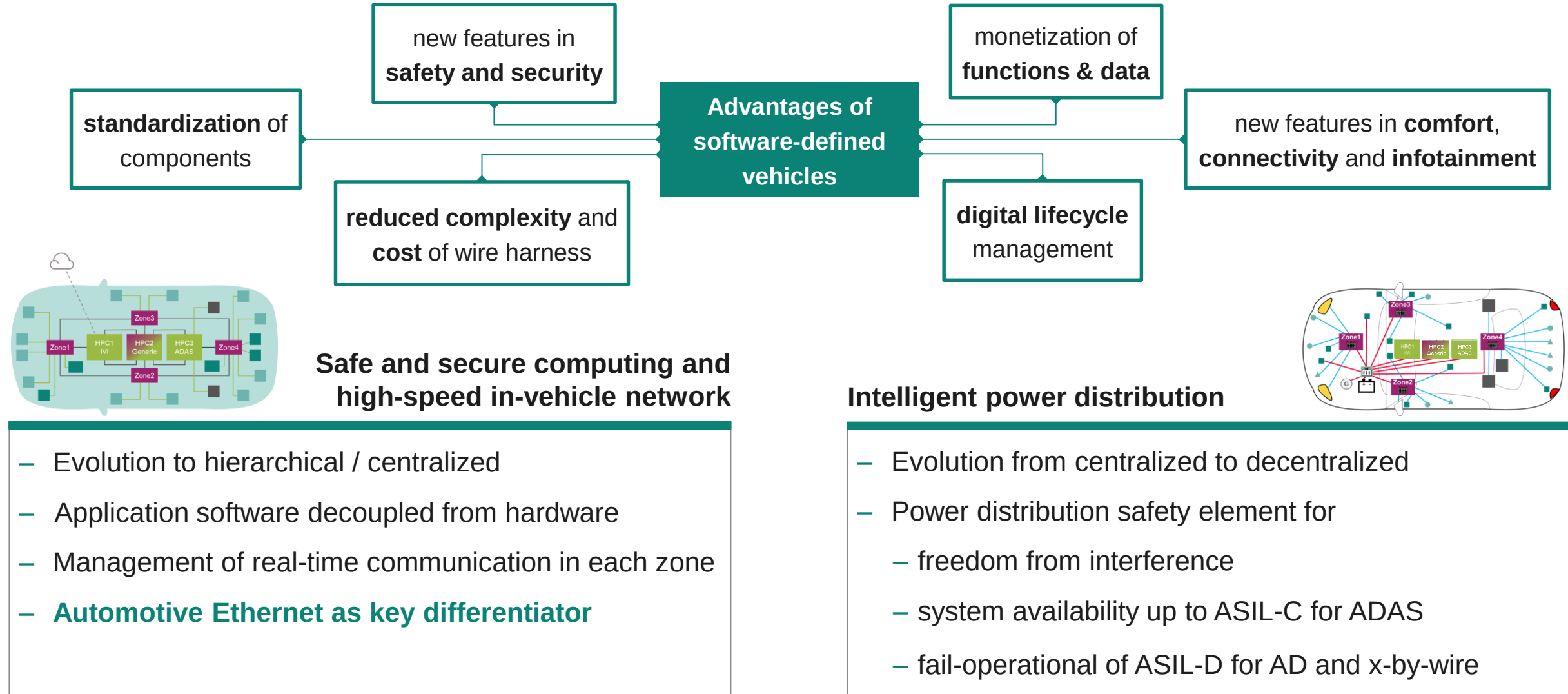
- Higher economic value
(impacting insurances, fleets, OEMs, Tier1s, 2nd life market)

Open to partner up with further OEMs, Tier1s, insurance companies

Software-defined vehicle



Software-defined vehicles are enabled by safe/secure computing, high-speed in-vehicle networks, and intelligent power distribution



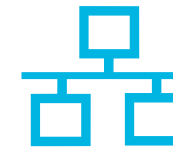
A unique opportunity to further strengthen our number one position in automotive MCUs and boost system capabilities



#1 automotive semiconductor company
and
global leader in automotive **MCUs**



#1 automotive Ethernet leader
with **complete portfolio**
for in-vehicle network

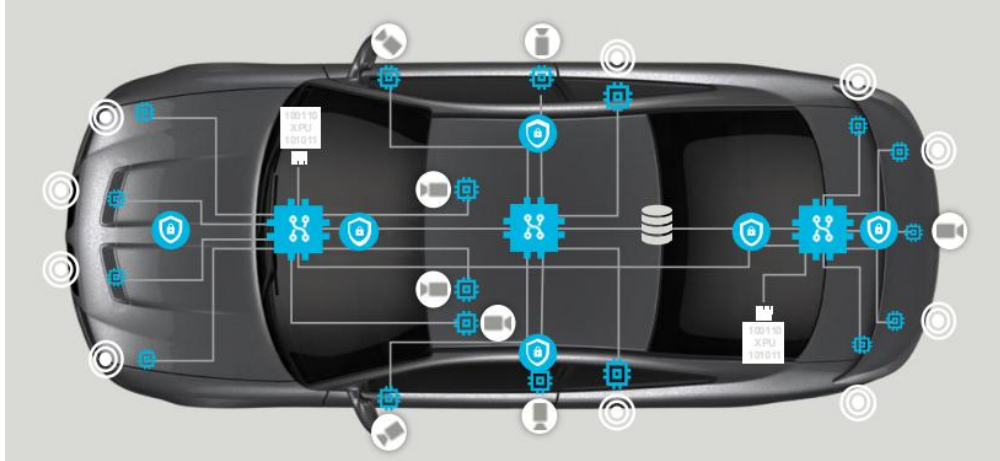


Automotive Ethernet
business owned by



Accelerate software-defined vehicle (SDV) transition
by zonal architecture built on Ethernet-based networks

Marvell is the automotive Ethernet leader with complete portfolio of PHYs, bridges and switches for in-vehicle network



■ Brightlane™ product focus

Brightlane™ – key products:

- Switches
- Bridges
- PHYs



Asset-light analog/mixed-signal ICs with differentiated software stack

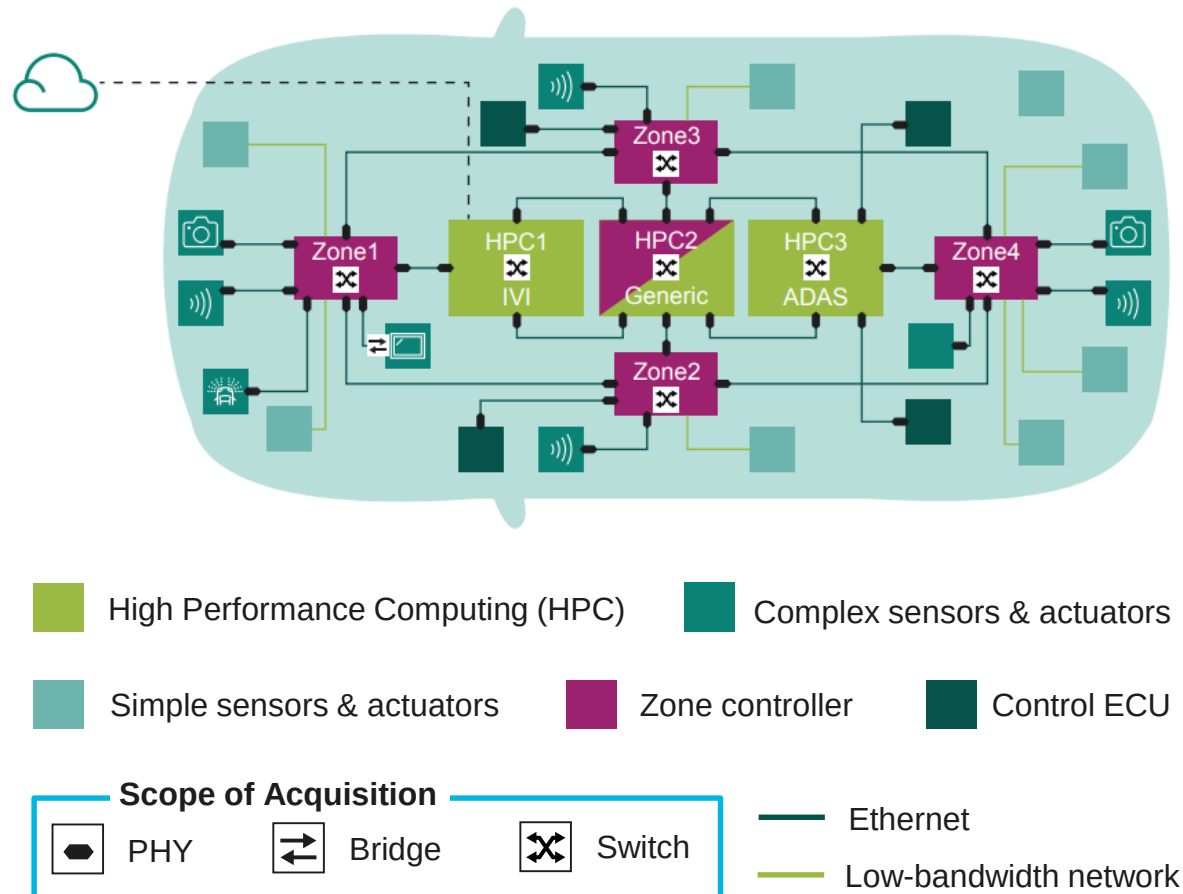
**Strong global presence at
8 of 10 top OEMs and all major Tier 1s**

**#1 market position based
on long history of dedicated R&D
in automotive Ethernet**

**~25% revenue CAGR until 2030
~\$4bn lifetime design-win revenue volume**

Ethernet capabilities allow for larger scope in SDVs, higher BoM, faster T2M for customers – strongly supporting our P2S play

Components of hierarchical E/E architectures:



Key benefits of the transaction for Infineon:

- Strengthens Infineon's **market-leading MCU business** and **enhances offerings for zonal architectures** in the context of **software-defined vehicles**
- Expands the scope of Infineon's MCU portfolio with **high-performance networking** capabilities
- Highly complementary to IFX's current portfolio, **extending our reach** within the **vehicle ecosystem**
- Highly **integrated chip solutions**, developed by a team of hundreds of **highly skilled employees**
- **Combined expertise – supported by Infineon global reach**

Compelling financial profile of the acquisition: highly accretive to ATV and supporting profitable growth of Infineon



Key benefits of the transaction – highly accretive to ATV:

**Standalone 2025e revenue:
\$225m to \$250m**

Gross margin: ~60%

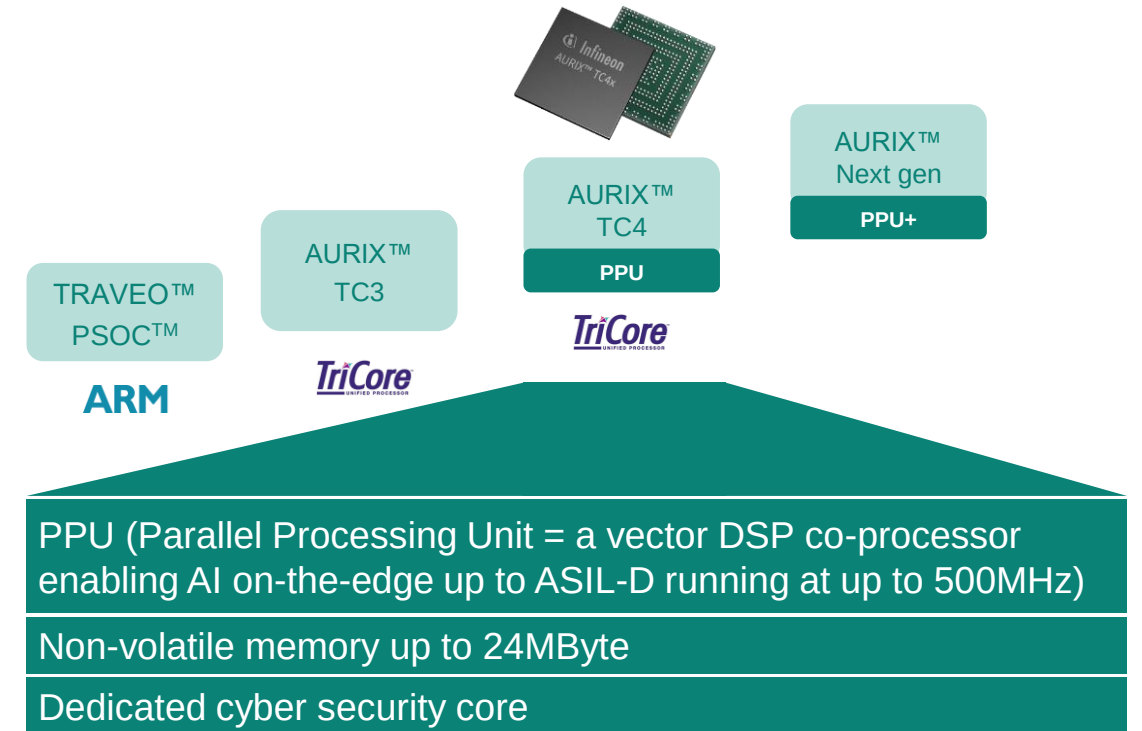
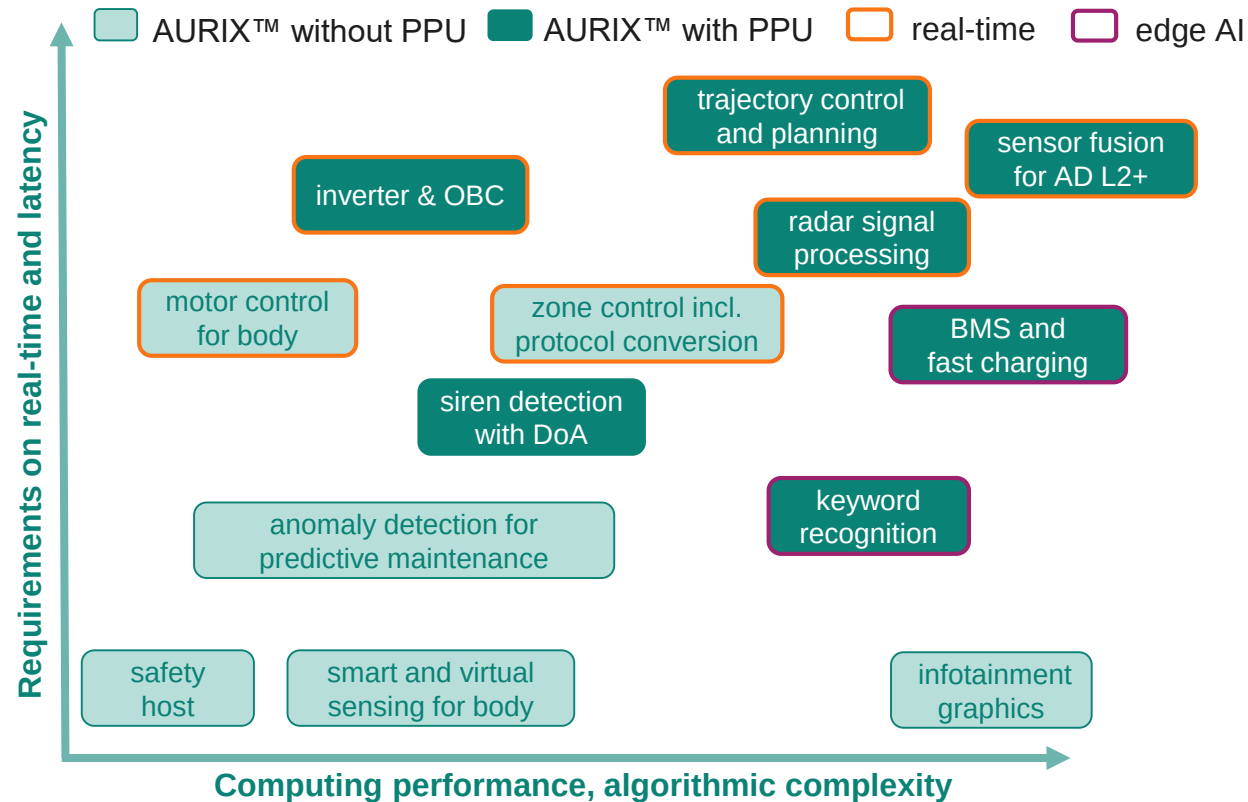
Revenue synergies enabled by reach and cost synergies by scale contributing to financial accretion

Transaction parameters:

- ~\$2.5bn purchase price, all-cash transaction
- Financed from existing liquidity, plus additional debt; acquisition financing from banks in place
- Clear commitment to investment grade rating and our conservative finance policy
- PMI will follow proven script, to be integrated into ATV division
- Customary regulatory approvals, closing expected within 2025

The Infineon AURIX™ family matches ideally all requirements in today's high-end applications

Map of application complexity and latency requirements

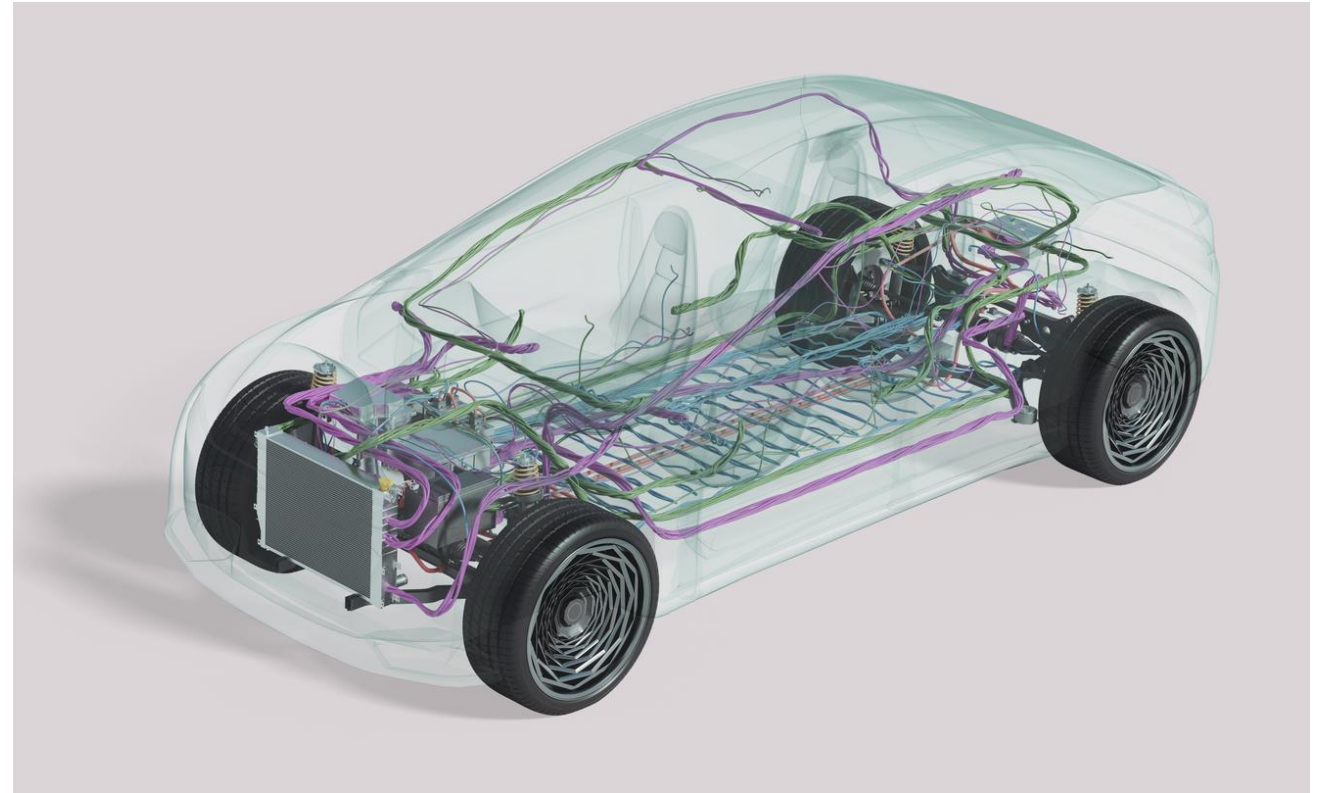
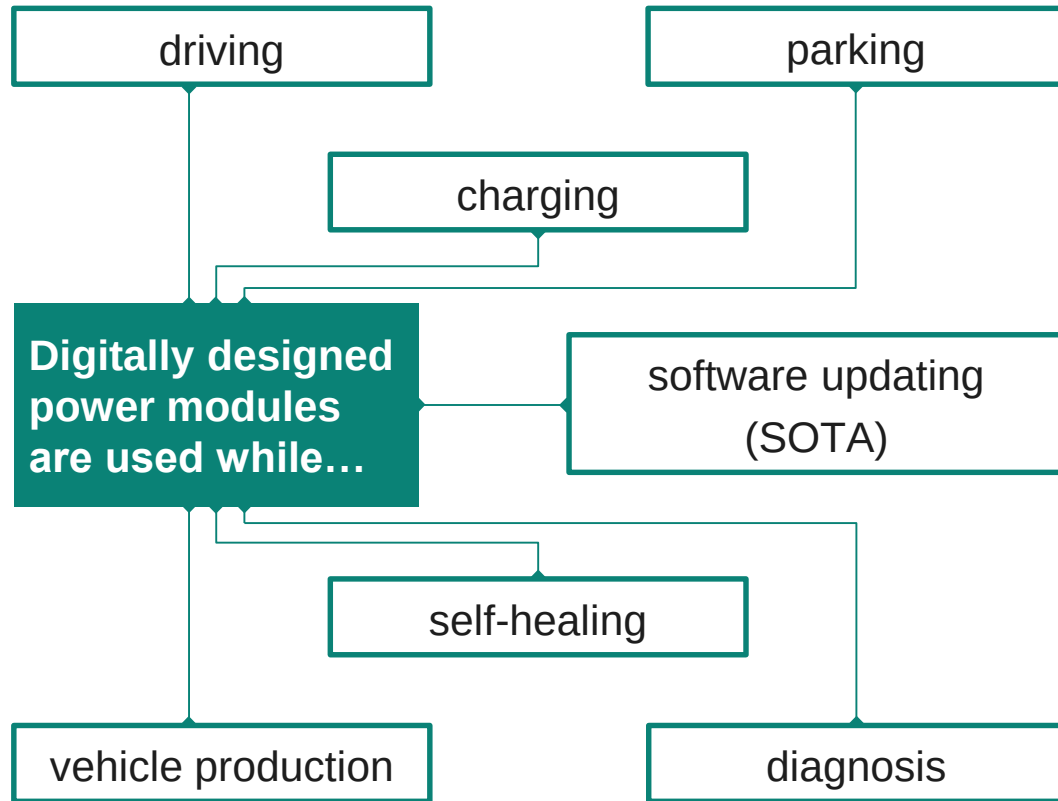


- Most of the real-time and safety-critical applications will not merge into a zone
- TC3 as safety host will remain the gold standard
- Emerging edge AI applications, fostered by imagimob acquisition

Infinion PROFET™, the semiconductor-based smart switches, are replacing physical fuses in modern zonal E/E architectures



With smart switches, referred to as 'eFuses', the power distribution (= electrical energy supply from the battery to the load) is digitized and supports more complex functions in the vehicle

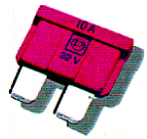


Smart semiconductors in power distribution systems is key enabler for SDV while ensuring high availability and resilience

Infineon PROFET™ Wire Guard enables SDV



Relay
replacement



Fuse
replacement



Load status
diagnostics

Switch

Protect

Diagnose

PROFET™ Wire Guard



Iso 26262
compliant

Fast failure isolation
($< 500 \mu\text{s}$)

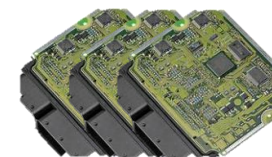
Central fuse box + many individual ECUs



- Big and heavy
- Complex wire harness
- High power loss
- Risk of interference



Decentral zone ECUs



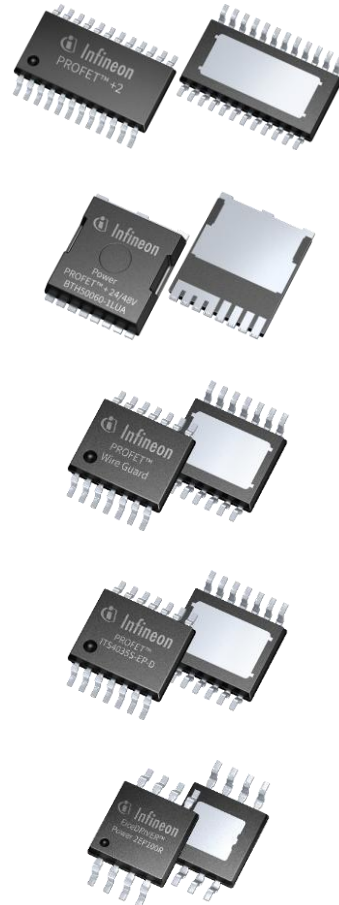
- Light and small
- Simplified wire harness
- Power efficient
- Freedom from interference
- Design flexibility
- Enable ADAS/AD, x-by-wire

Infiniteon PROFET family – analog semiconductors used in premium OEMs' next-generation E/E architecture platforms



On average >€100 BoM from PROFET family per vehicle:

- PROFET™ +2
- Power PROFET™
- PROFET™ Wire Guard
- SPOC™
- EiceDRIVER™



- Short-circuit detection several milliseconds earlier than fuses
 - peak current capped
 - cross section of physical cables reduced
 - savings on raw material (= resources) and weight
- increased safety and reliability
- key enabler for optimized wiring harness
- lower energy consumption
- non-destructive protection
 - reduced need for maintenance

48 V enables higher power demand features for future E/E architectures and automated driving

Demand of in-vehicle loads is sharply increasing and requires 48 V architectures

- More high-power applications and the introduction of zonal E/E architectures drive the need for higher power capabilities
- 12 V power systems are facing challenges
- Future-readiness for automated driving

Present high-power features

- | | |
|----------------------------|---------|
| – Body control | ~1 kW |
| – Chassis control | ~1 kW |
| – Powertrain control | ~1 kW |
| – Cockpit and ADAS control | ~0.5 kW |

Power demand

3-4 kW

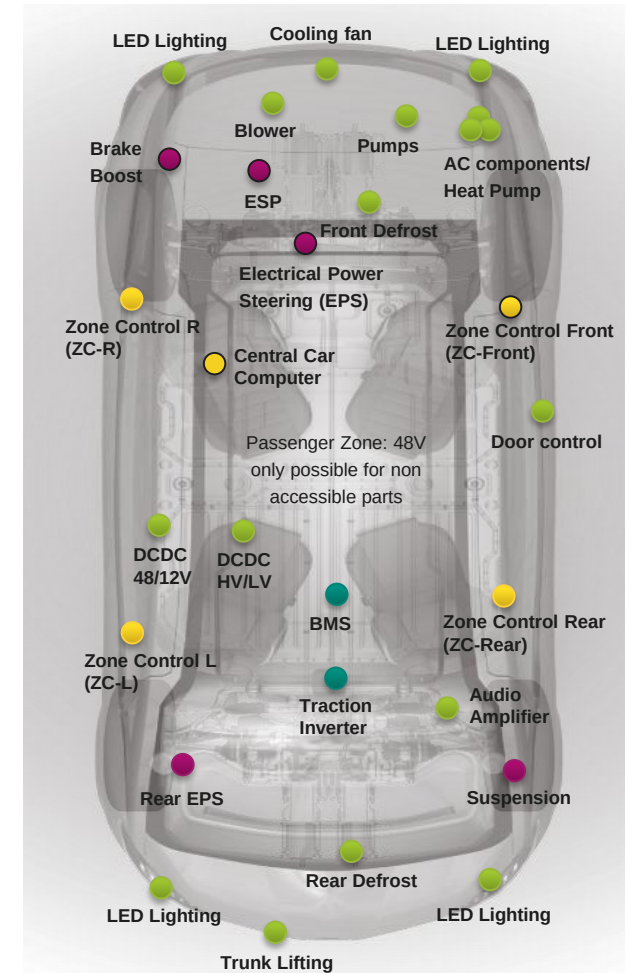

around
3x

Future high-power features

- | | |
|--|----------|
| – Steer-by-wire (EPS) | 1-2 kW |
| – Rear wheel steering | 1-1.5 kW |
| – Brake-by-wire (electro-mechanical brake) | 1-2 kW |
| – Active roll control | ~3 kW |
| – Active suspension | 2-3 kW |
| – Central computer | 1-3 kW |
| – Cockpit (infotainment) | 0.5 kW |

Power demand

9-12 kW

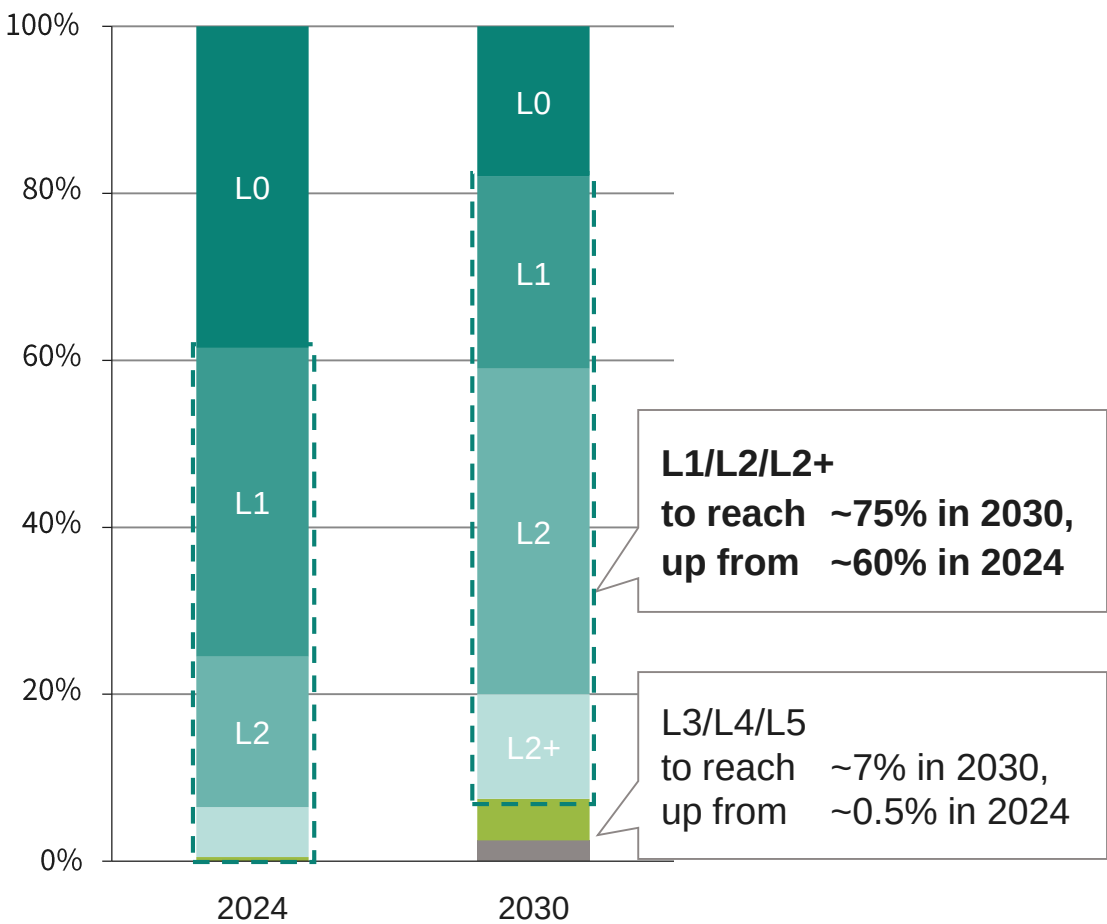


- High-power body applications
- High-power chassis applications
- Zone/central computer
- Powertrain control

Growth of L1/L2/L2+ is the main driver of ADAS semiconductor content until 2030

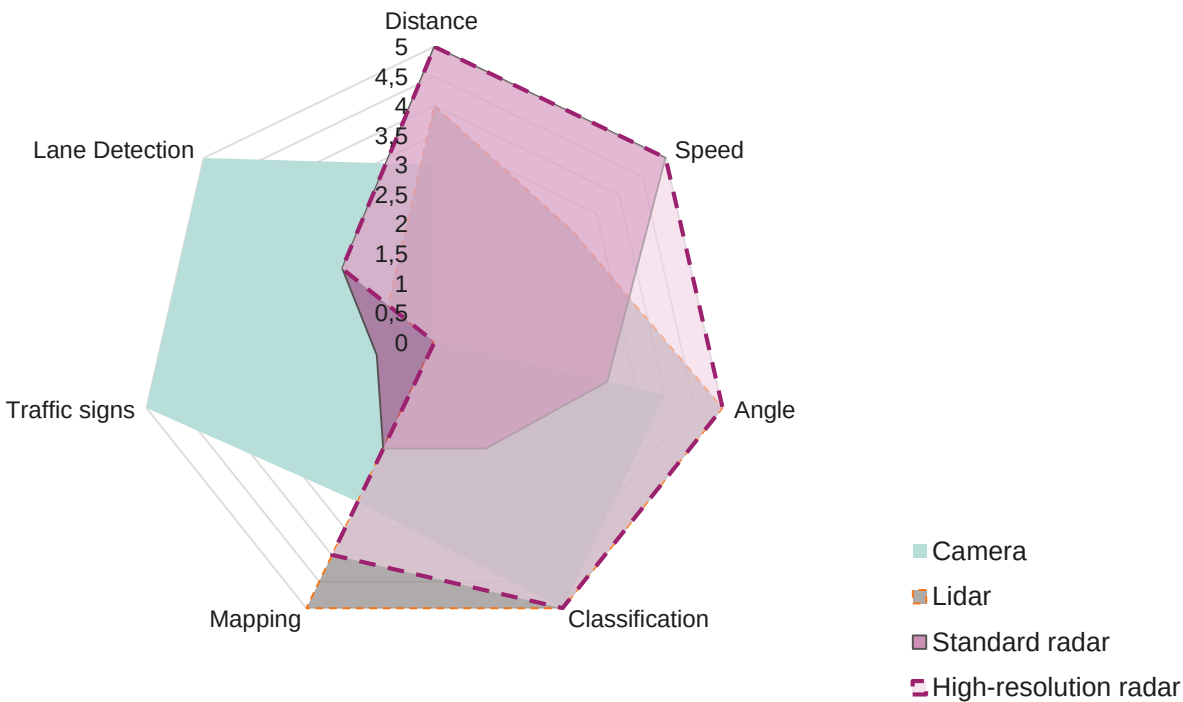


Car production by degree of automation (SAE level)



Market research companies; Infineon

Radar is essential to meet decisive requirements of ADAS/AD



- Standard radar is **the** technology to detect distance and speed
- High-resolution radar significantly improves angle and classification

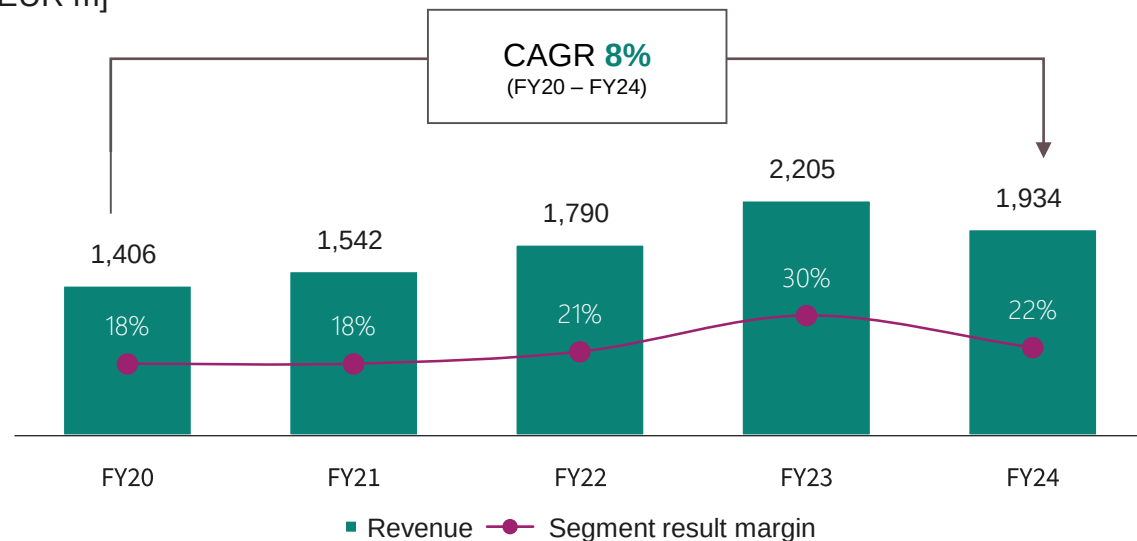
Green Industrial Power



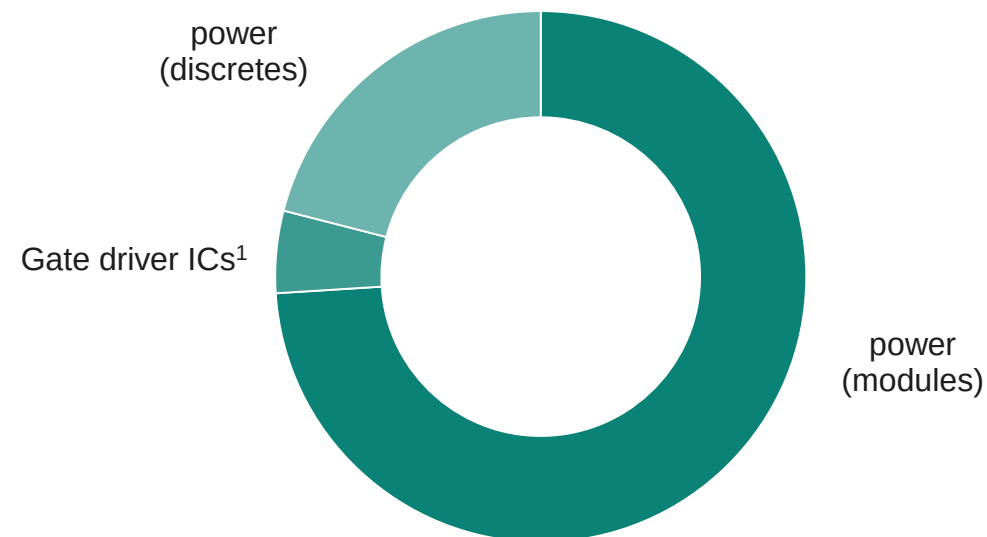
Gate driver ICs

GIP revenue and Segment Result Margin

[EUR m]



FY24 revenue split by product group



Key customers



¹ Gate driver ICs, currently allocated to the Green Industrial Power segment, will be reclassified to the Power & Sensor Systems segment beginning 1 October 2025

Cautious signs of improving sentiment, structural drivers lift GIP market outlook; growth in Power Infrastructure and Transportation



Applications

% of FY24 segment revenue



~30%
Renewable
Energy
Generation



~10%
Power
Infrastructure



~10%
Transportation



~30%
Automation
& Drives



~10%
Heating, Ventilation,
Air condition



~10%
Home
Appliance

Market outlook for CY25



- While value chain inventories improve, price pressure persists and limits growth. However PV installations continue to grow.
- Record wind turbine order backlogs and policy momentum underpin wind market. Wind installations growth remains stable, although US market is facing headwinds.



- Demand for EV Charging (DC) is further growing, although at a different pace across regions.
- Grid extension and forming requirements foster demand in T&D and ESS.



- Rail market sentiment remains positive.
- Slowed electrification in cars and trucks reduces absolute demand, YoY growth in percentage remains double digit.



- Demand recovery is taking longer than expected, with no clear signs visible. Macroeconomic sentiment weighs on investment decisions.



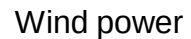
- Moderate signs of upswing, although excess inventory and weak real estate markets continue to affect market negatively.



- Stabilization is expected due to implementation of substantial Greater China government subsidy program.



+4,600 GW



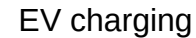
+1,900 GW

Grid network

**\$600bn annual
investments**



+900 GW



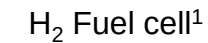
**+185m chargers
(public and private)**



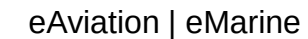
+560 GW

Heat pump

+420m units



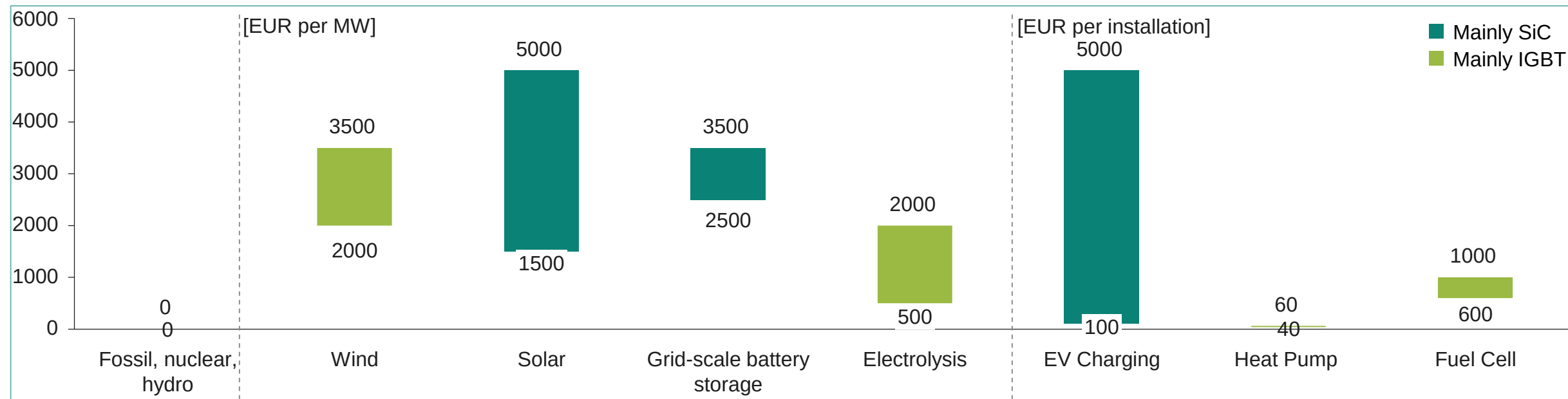
+200k FC EV
+200k FC Trucks



50

Green energy generation provides large business opportunities

Power semiconductor content by application



Additions in 2022 ¹	74 ^[GW]	220 ^[GW]	12 ^[GW]	<1 ^[GW]	~6m ^[inst.]	22m ^[inst.]	5k ^[inst.]
CAGR 2023 – 30	16%	23%	56%	92% ²	31%	16%	42%

¹ IEA: World Energy Outlook, October 2023; Sector Tracking reports October 2023; internal Analysis

² Based on 270 GW pipeline (midpoint), >100% based on NZE requirements of 560GW

EV charging is a key strategic application for Infineon

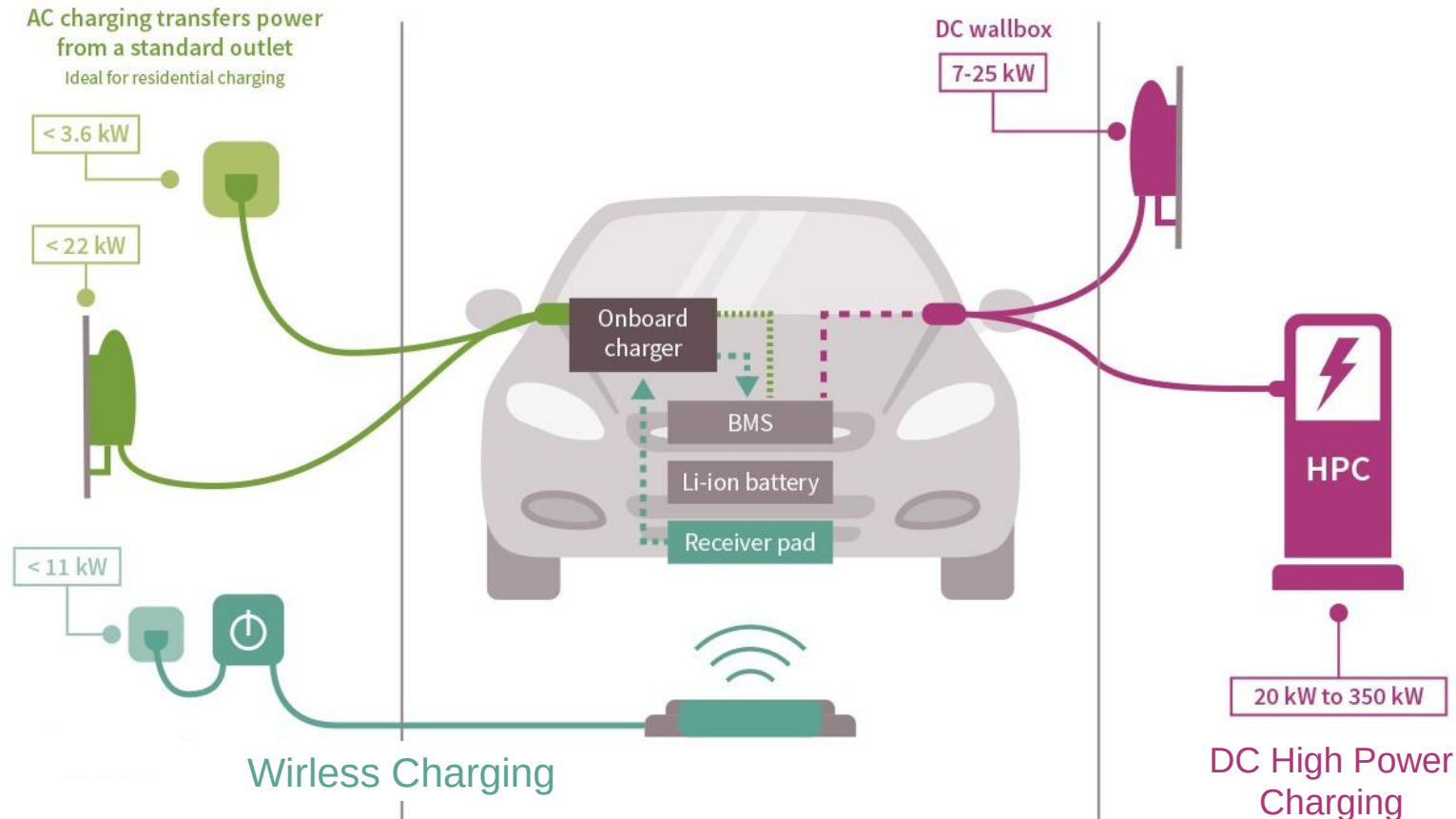
We cover the full ecosystem from AC to high power DC charging



Connectivity solutions

Automotive systems

High power industrial systems



Infineon targets the complete EV charging ecosystem from AC to high-power DC

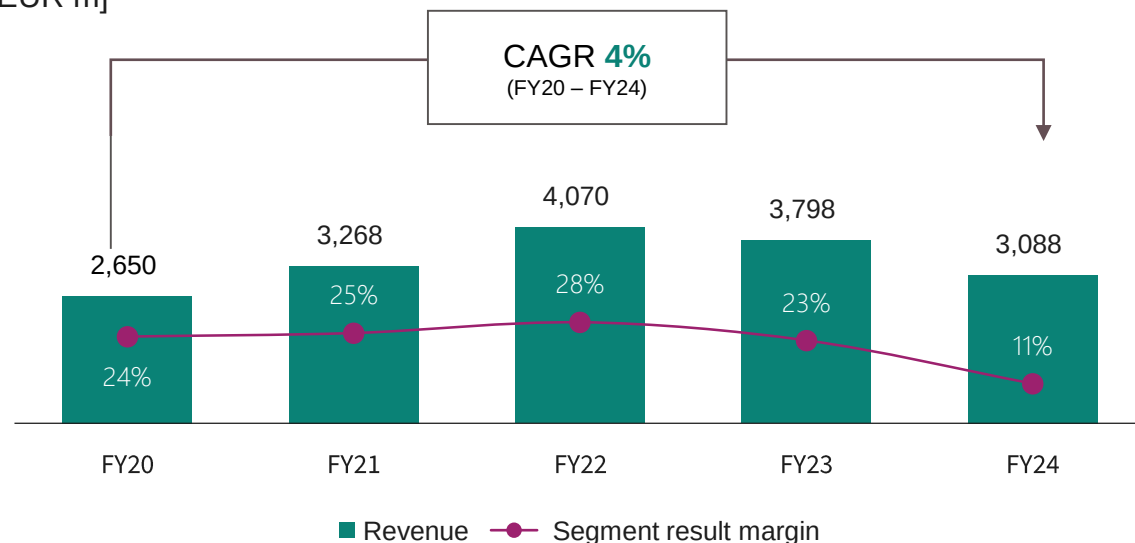
Power & Sensor Systems



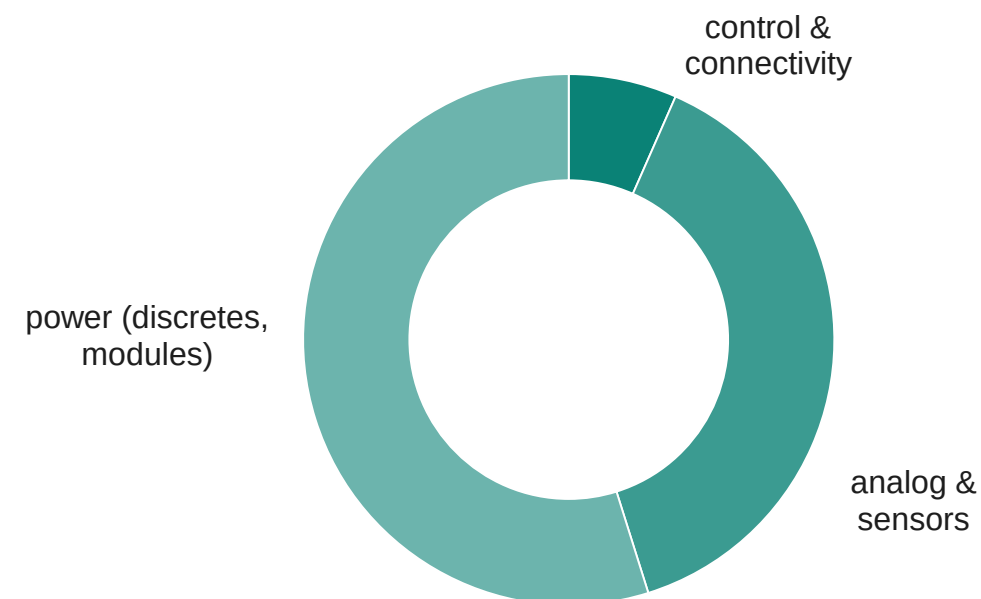
PSS at a glance

PSS revenue and Segment Result Margin

[EUR m]



FY24 revenue split by product group



Key customers



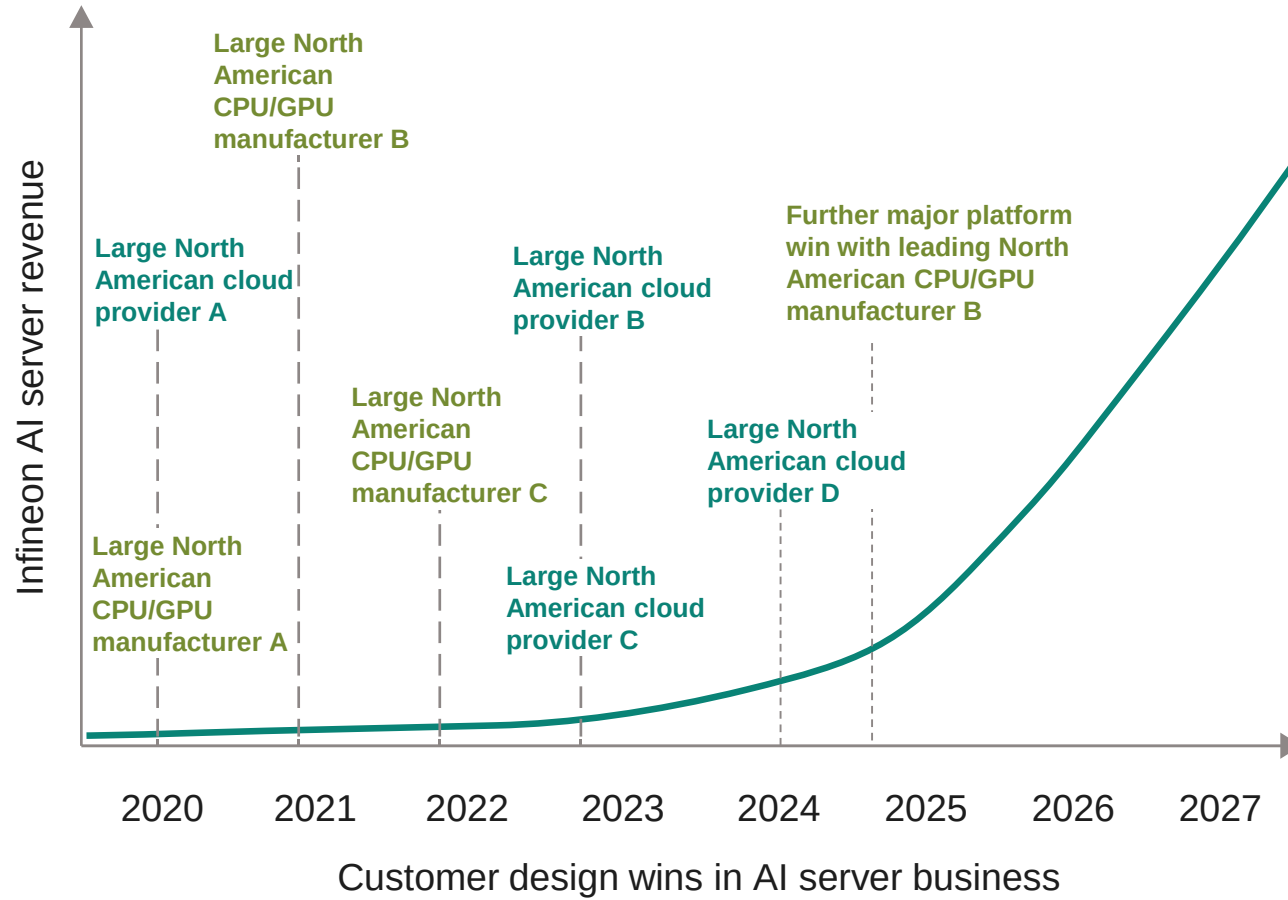
Improving visibility end-markets in CY25; upside potential driven by improving macro conditions and AI

Applications	
% of FY24 segment revenue ¹	
	~20% Computing
	~5% Communications
	~10% Smartphones
	~25% Consumer
	~30% Industrial

Market outlook for CY25	
	– Server AI strength to continue in CY25 and will be complemented by cloud computing growth. – PC market is expected to see traction from refreshment cycle during 2H CY25.
	– Flattish year-over-year telco capex development expected but well progressed inventory digestion and tailwind from new deployments in India.
	– A year-over-year increase in smartphone unit shipments is forecasted.
	– Some consumer markets already picking up in CY25 but uncertainty remains due to current macro and geopolitical environment.
	– Industrial market expected to benefit from lower interest rates and Chinese EV market. Excess inventory forecasted to come done until end of CY25.

¹ Does not sum up to 100% due to other applications not shown here

AI will be a strong driver of revenue increase for Infineon's server business



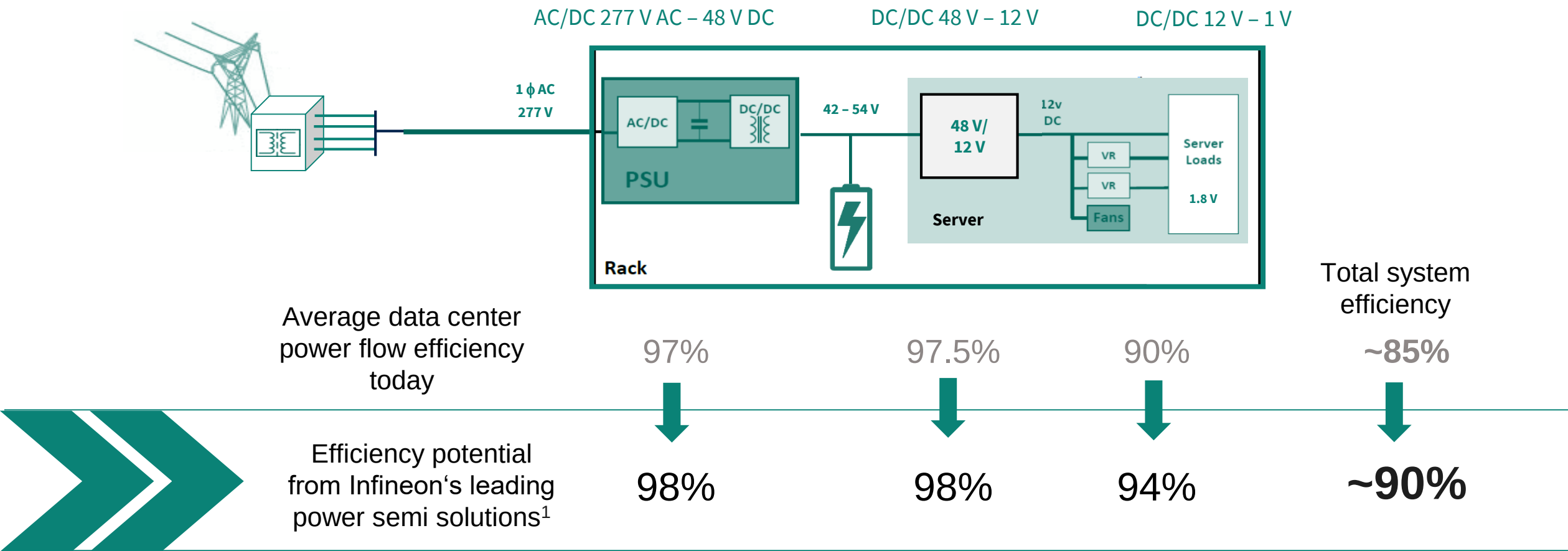
In FY25 AI revenue in our server business is expected to be **around €600m**

We expect to achieve revenue of **around €1bn** next year

With its energy efficient power semiconductors Infineon is serving all AI-related power conversion from grid-to-core



Power delivery network losses in an average AI data center



¹ Using GaN, SiC & vertical power modules

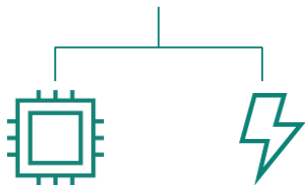
We power AI – today and in the future

Architectural evolution beyond 250kW, and up to 1MW per rack

1

Today

PSUs within server rack
<250kW/rack



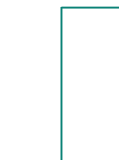
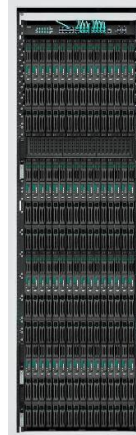
IT payload

Power delivery
& backup power

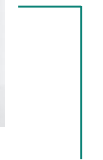
2

2027+

3- Φ HVDC Power Sidecar
~500kW+/Rack



IT payload

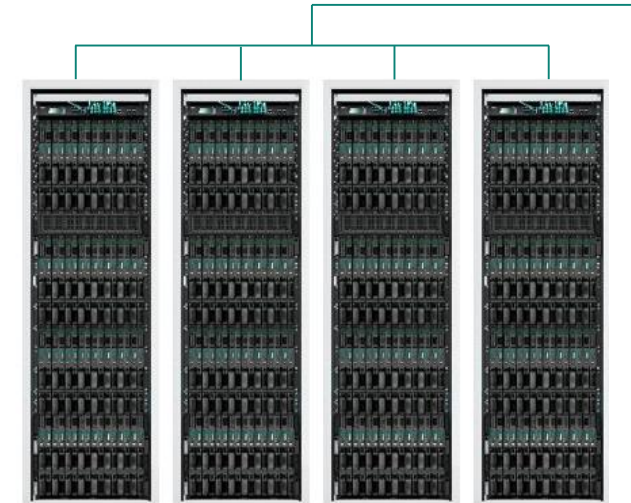


Power delivery
& backup power

3

2029+

Hybrid microgrid
1MW/Rack

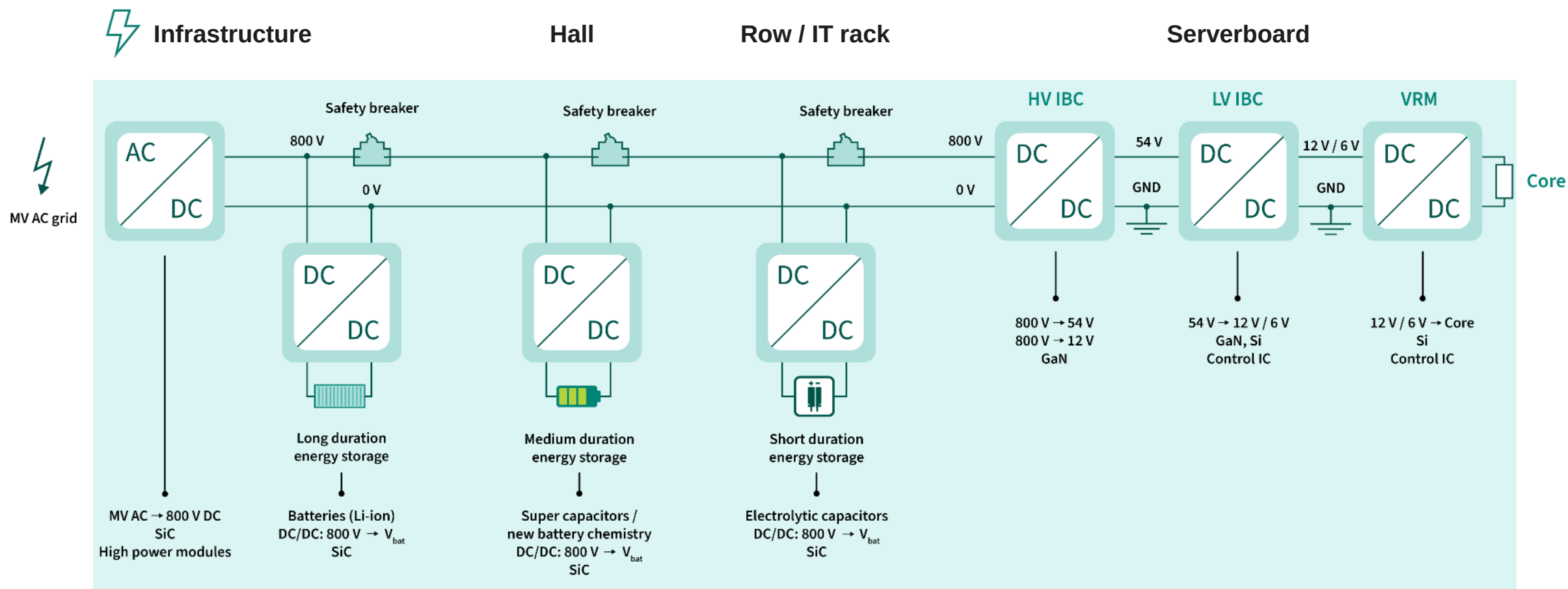


IT payload

Power delivery &
backup power
through central infrastructure

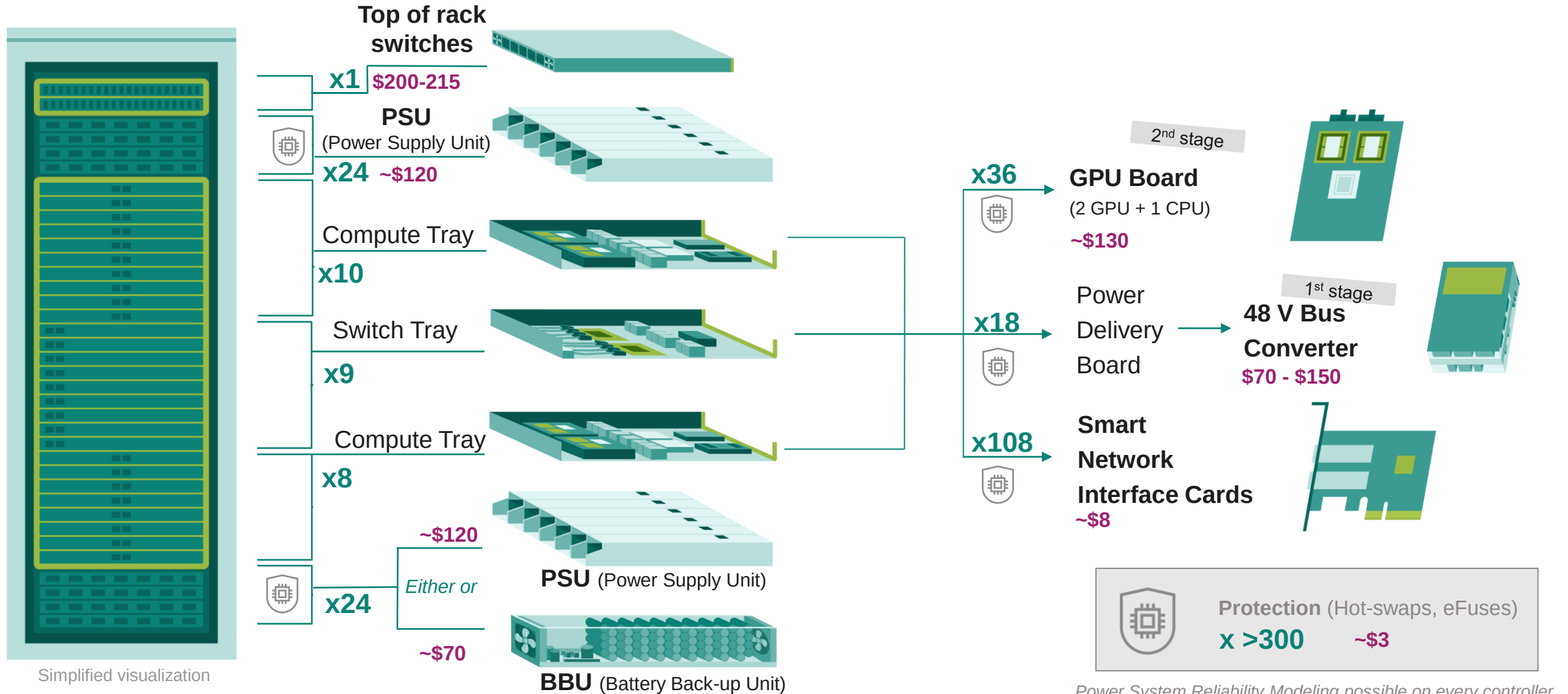
Infineon and NVIDIA collaboration

Future GW-scale data center architecture with centralized power generation using fewest power conversion stages



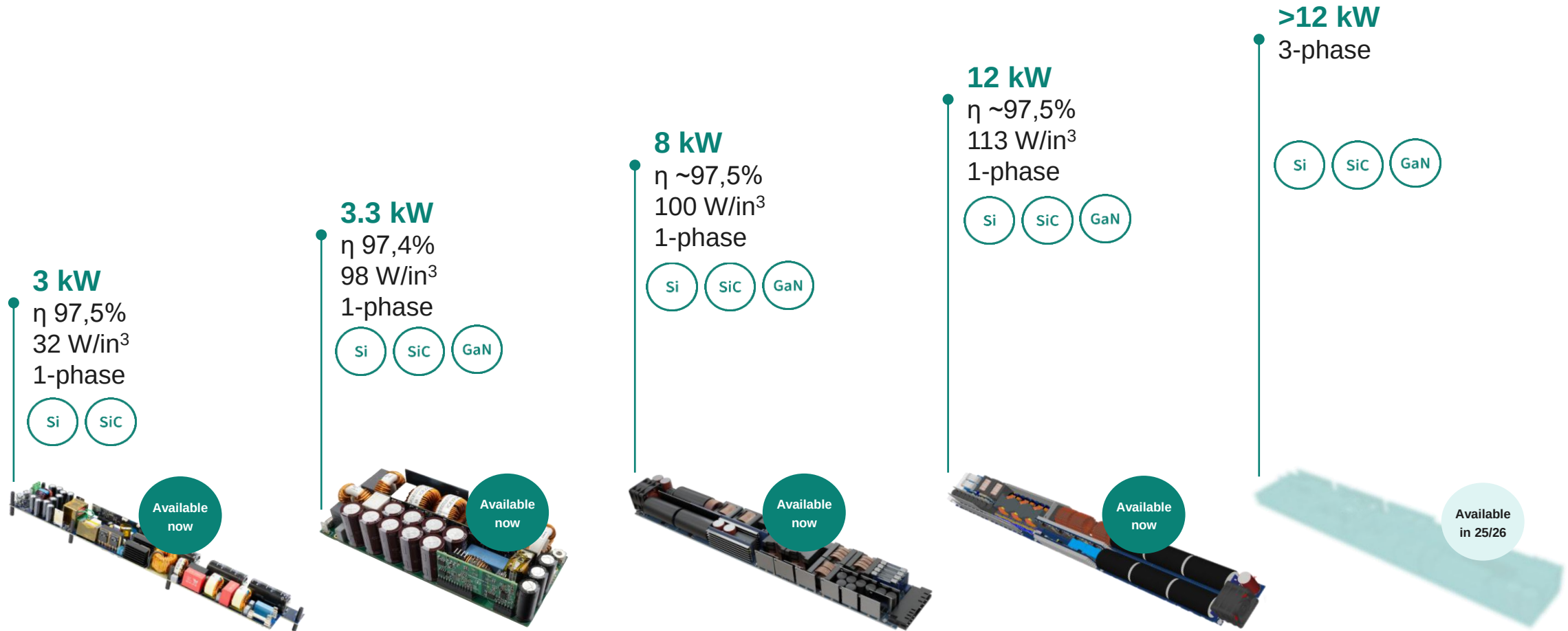
Leading performance high density AI Server for accelerated compute

– Infineon BOM per AI server rack up to between \$12k and \$15k



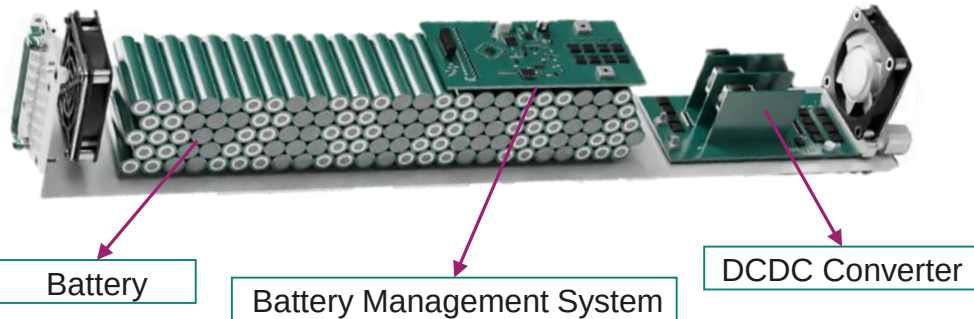
Infiniteon is tackling the rising power requirements of AI systems with its state-of-the-art PSU solutions for AC/DC

Power Supply Unit (PSU) solutions ranging from 3 kW to 12 kW and beyond



Addressing the Challenge of Increasing Battery Cells with innovative solutions for High Power Density

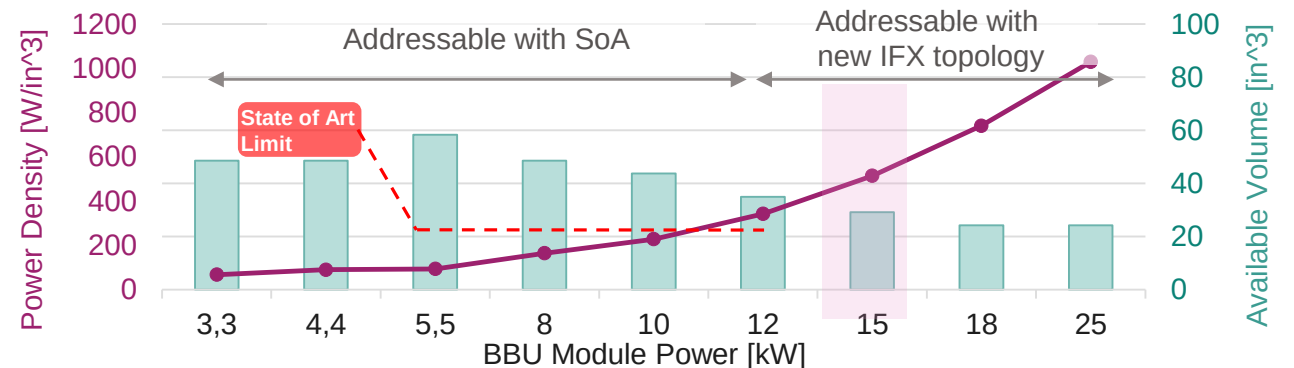
BBU Module Functions



- **Power density x4** higher
- **Efficiency** increase **+1 - 1.5%**
- **Flat efficiency curve**
- **BOM optimization** thanks to the down-sizing of component rating
- **Unparalleled power density and efficiency** by harnessing the potential of **GaN technology**

1. **Converter Power Density** to enable more battery cells per BBU
2. **Protect AI servers** from power fluctuations (peak power shaving)
3. **Prevents data loss** and **system downtime**
4. **Efficiency for TCO¹** in peak shaving
5. **Thermal Management** in air cooled solutions
6. **Quicker recharge**
7. **Full system portfolio** based on Infineon's **patented topology**

¹ TCO – total cost of ownership



Outperforming existing solutions in terms of efficiency, power density and cost-effectiveness

OptiMOS™ 6 80 V MOSFET in DC-DC converter sets new benchmark for AI server power efficiency in leading AI server platform



Key Facts

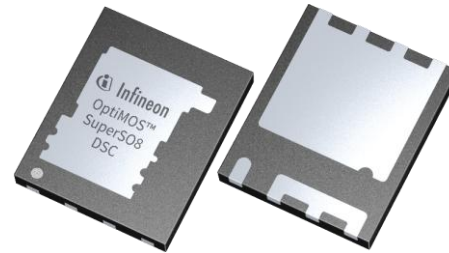
Optimized for 48 V IBCs

Offers **optimized switching performance** in hard switching topologies

Efficiency increase of around 0.4% compared to previously used solutions

Compact package **enables cooling on both sides**

Package



5x6 DSC

5x6 mm² dual side cooling (DSC) package

Applications



Artificial intelligence



Datacom Telecom



SMPS



Server

Evolution of power modules by doubling power density with smaller form factors

Dual-Phase power



TDM2254xD

Discrete Chip Embedded Powerstage
3x die embedded
1.0 A/mm²

2024

Dual-Phase power



TDM2354xD,
TDM2354xT

Substrate Chip Embedded Powerstage
6x die embedded
1.5 A/mm²

2025

Quad-Phase power



TDM2454S

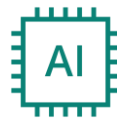
Substrate Chip Embedded Powerstage
12x die embedded
2.0 A/mm²

2025

Pushing power density envelope without compromising thermal performance



- High efficiency achieved using proprietary magnetics
- Chip Embedding enables enhanced thermals

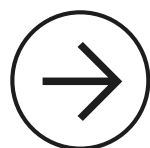


- Quad-phase module has embedded input and output capacitors (>400 µF)
- Quad-phase module enables True Vertical Power Delivery

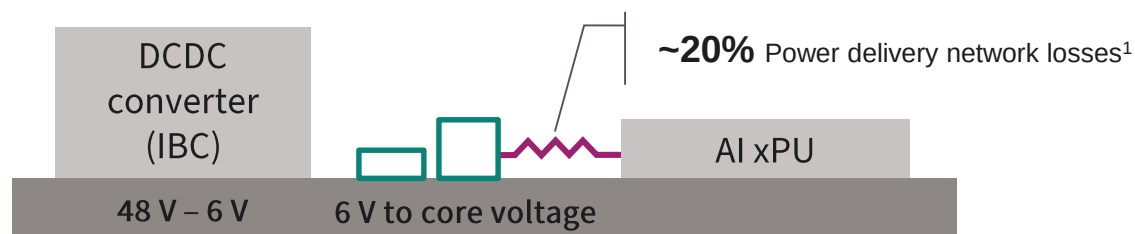
Vertical power delivery reduces power losses in AI data centers

Why backside mounting of our ultra-high current density power module?

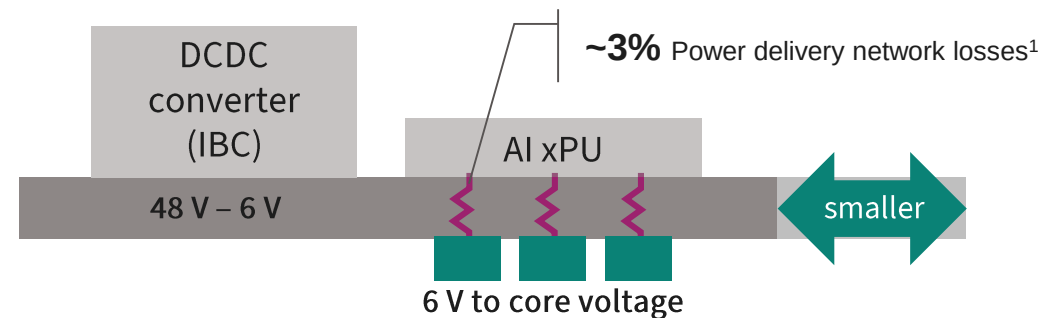
- ~85% Reduction of power delivery network losses compared to lateral “down” solution
- ~55% Reduction in size compared to lateral “down” solution



Lateral power delivery
of a discrete “down” solution



Vertical power delivery
of our ultra-high current density power module



Infineon discrete “down” solution



Infineon power module solution



Resistance



Motherboard

Source: Infineon calculation with TDA245C0 and TDM24545S quad-phase power modules

¹ Power Delivery Network (PDN) loss in % of xPU power

Sensor business in one organization will create clear benefits for the customers as 3rd pillar besides Power & Embedded Control



Infineon joins forces to become a leader in the sensor market

Customer centricity



Strengthen go-to-market approach

Faster time-to-market

Comprehensive portfolio



Combined roadmap for innovation leadership

Leverage synergies

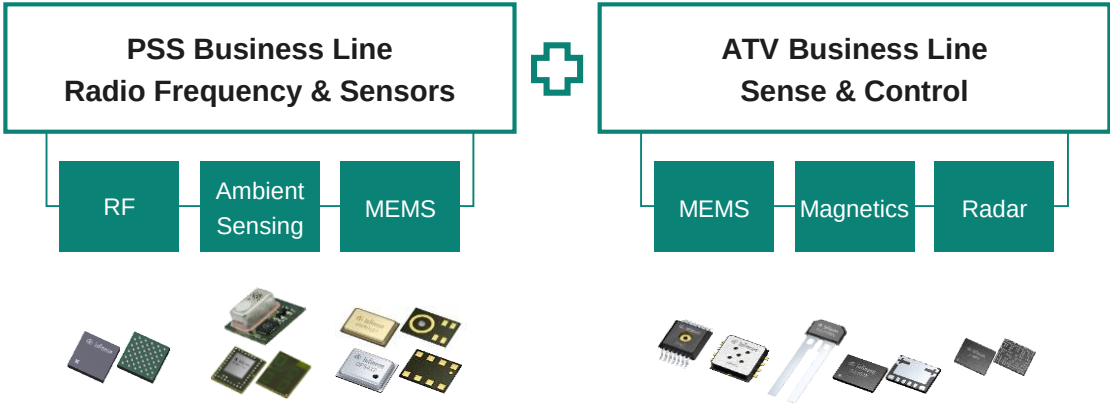
Innovation-to-customer



Shared and broad customer support

More customer value

PSS Business Unit SURF (Sensor Units & RF)



Consolidated product portfolio with broad applications



Automotive



Industrial



Consumer

Magnetic Sensors			MEMS				RF	
Speed	Current	Position	Pressure	Gas	Sound	Innovation	Radar 3D-Imaging	Mobile & Wireless RF

Infineon SURF serves all markets even better

- Efficiency gains by leveraging synergies
 - Short term: more sensor holistic business development and support
 - Mid- to long term: stronger product roadmap and go-to-market

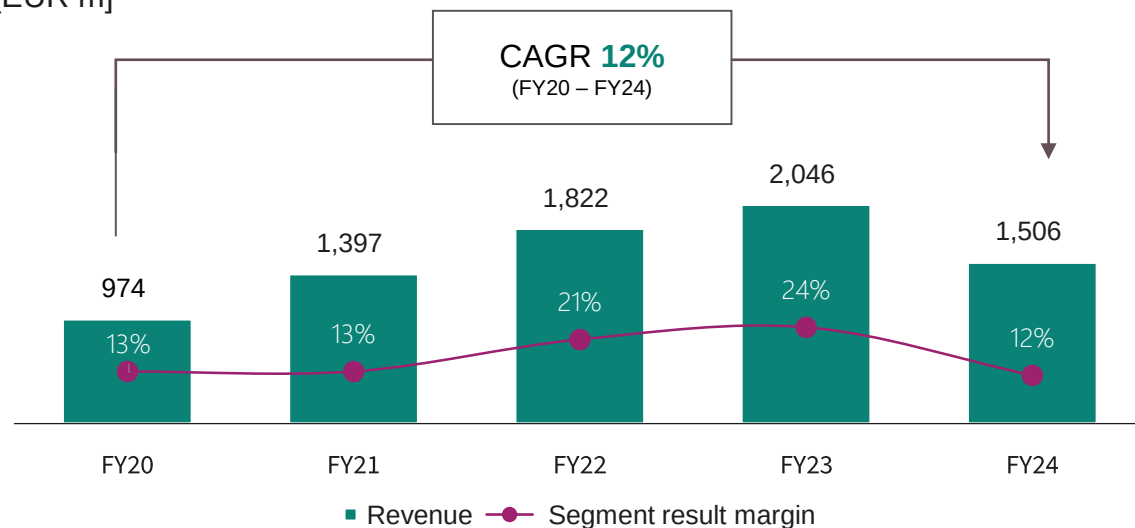
Connected Secure Systems



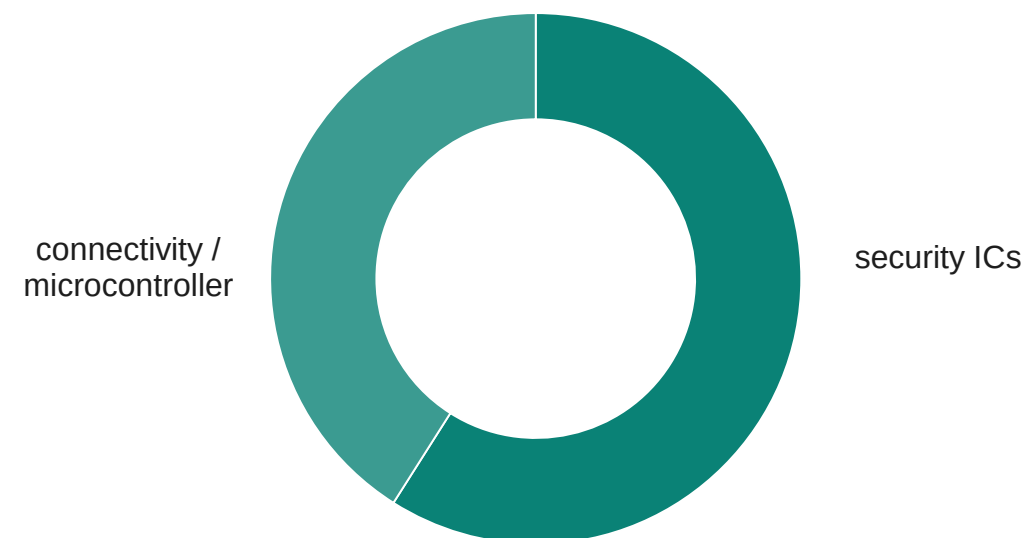
CSS at a glance

CSS revenue and Segment Result Margin

[EUR m]



FY24 revenue split by product group



Key customers



Outlook for CY25 influenced by continuing macro uncertainties and low consumer sentiment



Applications

% of FY24 segment revenue

~55%
Industrial and Consumer IoT



Industrial IoT



Home Appliances



Smart Home



Health & Lifestyle



Media, Game & Compute



Automotive

~45%
Smart cards



Payment



Identification

Market outlook for CY25



Risks persist; potential recovery slowing down due to changing macro economic situation, including tariffs.



Gradual improvement during CY25 driven by new product launches and specific regional incentive programs, but uncertainty remains.



The Market might accelerate driven by new product introductions and standards (Matter), however growth prospects are affected by macro economic risks and low consumer confidence.



Wearable devices shows slight growth driven by new product introductions, however growth prospects are affected by macro economic risks and low consumer confidence.



Smartphone unit shipment slight increase forecasted for CY25; PC market expected to see traction from refreshment cycle; growth expected for Gaming due to new product launches.



Headwinds from tariffs put pressure on growth prospects.



While card issuing is assumed to be stable, inventories in the value chain are assumed to affect the market growth.



FY25 demand might be affected by stock overbuild at the customers.

Providing the essential building blocks compute, connectivity, security, and software



Consumer



Industrial



Automotive

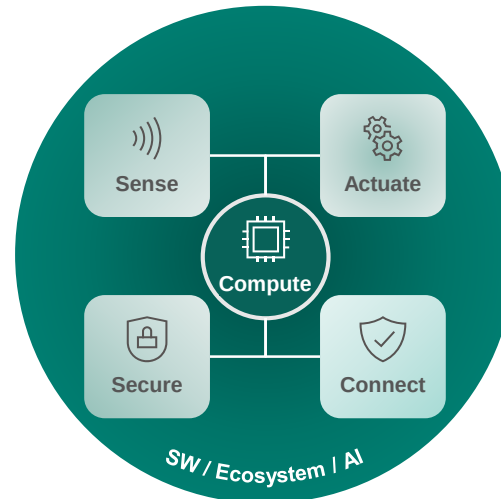


Compute

PSOC™ and **XMC™**
micro-controllers allow
customers to enable smart,
connected products

Security

OPTIGA™, **SECORA™** and
TEGRION™ solutions provide robust
embedded security for IoT devices,
authentication, payments,
identification, and access control



Software

DEEPCRAFT™ Studio and
ModusToolbox™ software
simplifies and accelerates
development for Infineon MCUs

Connectivity

AIROC™ **Wi-Fi** and **Bluetooth®**
products provide ultra-robust,
low-power wireless
communications

CSS seamlessly interconnects **compute, connectivity, security, and software** - the essential building blocks of digitalization

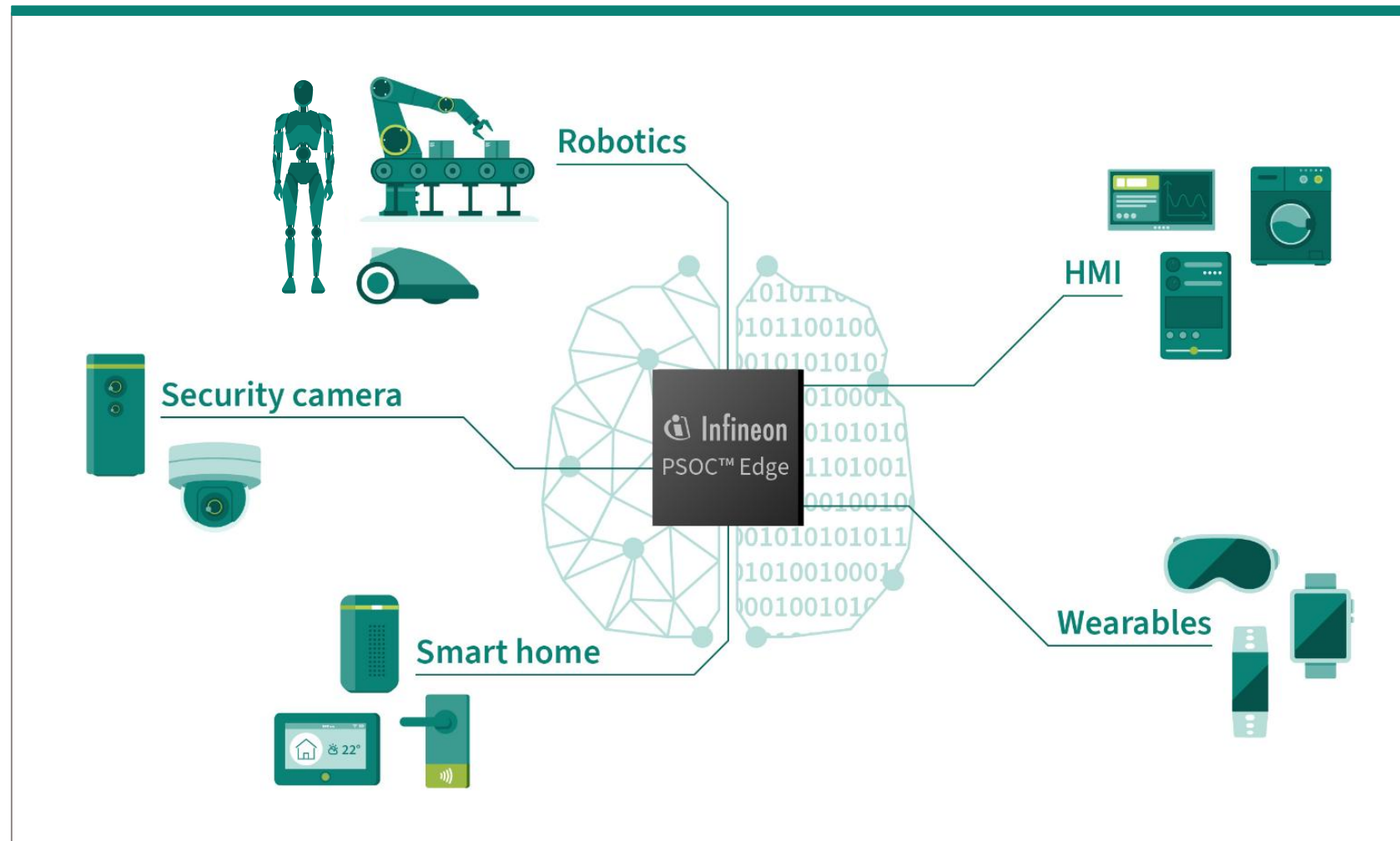
Infineon's MCUs at the heart of every IoT and Edge AI application

New compelling MCU platforms



- Broad application range in **Edge AI, IoT, Consumer, and Industrial**
- Strength in **low power, high performance, security, and reliability**
- Roadmap focus on **AI, security, and integrated connectivity**

PSOC™ Edge – Enables a new generation of responsive machine learning devices



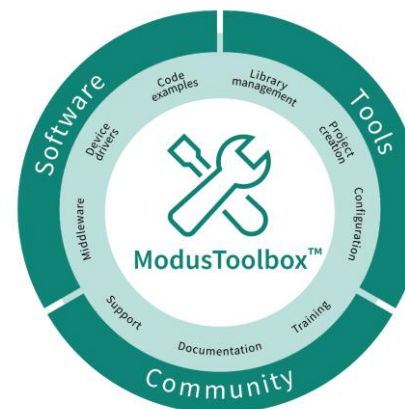
Software with maximal ease of use

DEEPCRAFT™ Studio



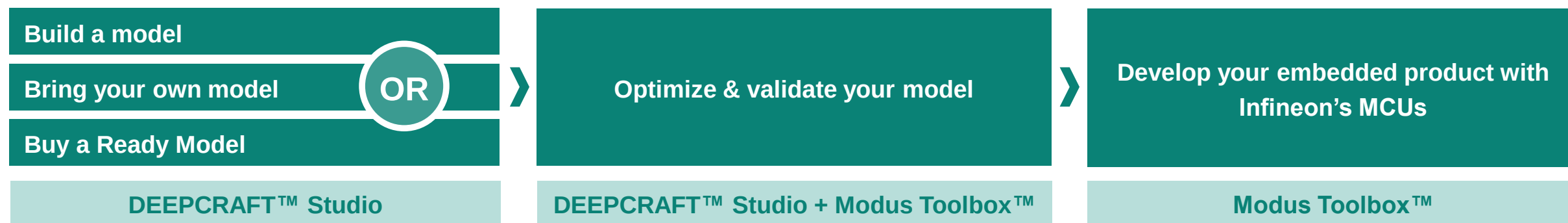
- Infineon's Edge AI development platform
- Data collection & pre-processing, model training, model conversion & deployment
- Provides AI-models for a wide variety of applications

ModusToolbox™



- Infineon's modern, extensible development system
- Collection of development tools, libraries, and embedded runtime assets

Full journey from Edge AI model development to embedded software with flexible entry



Enabling connectivity with Infineon's broad wireless portfolio for IoT, industrial, and automotive applications



Wireless connectivity portfolio & advancements in UWB

Wi-Fi AIROC™

- **Comprehensive Portfolio:** Wi-Fi 4,5,6/6E and connected MCUs
- **Ultra-low power** consumption
- **Integrated MCUs** for simplified IoT design
- Advanced Wi-Fi 6/6E with **future-ready Wi-Fi 7** capabilities



Bluetooth® AIROC™

- **Full-featured Bluetooth®** portfolio with SoCs and modules
- **Low-energy focus** for extended battery life
- **Long-range Bluetooth® Low Energy (LE)** for industrial and automotive applications



Wi-Fi- & Bluetooth® Combo AIROC™

- Combines Wi-Fi and Bluetooth® in one module for **dual-connectivity use cases**
- Pre-certified for **faster time to market**



Wireless Connectivity

Ultra Wideband (UWB)

- Acquisition of UWB pioneer **3db**
- **Target applications:** Car access and fine ranging



Infinion provides a comprehensive end-to-end embedded AI solution - CSS provides most essential building blocks



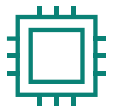
Edge AI solution offering



In-house AI Software
DEEPCRAFT™ Studio



Development & AI
Ecosystem Modus
Toolbox™



Microcontroller
PSOC™ & XMC™



Connectivity & security
solutions
AIROC™ & OPTIGA™



Sensors
XENSIV™

Customers' benefits

- Software perfectly tailored to Infineon hardware ensures **peak performance** and **simplified development**
- Comprehensive solutions **speed up time-to-market**
- Embedded AI solutions enable **edge processing, improving latency, and enhancing data privacy**
- Embedded AI solutions ensure smooth integration into **a wide range of applications**

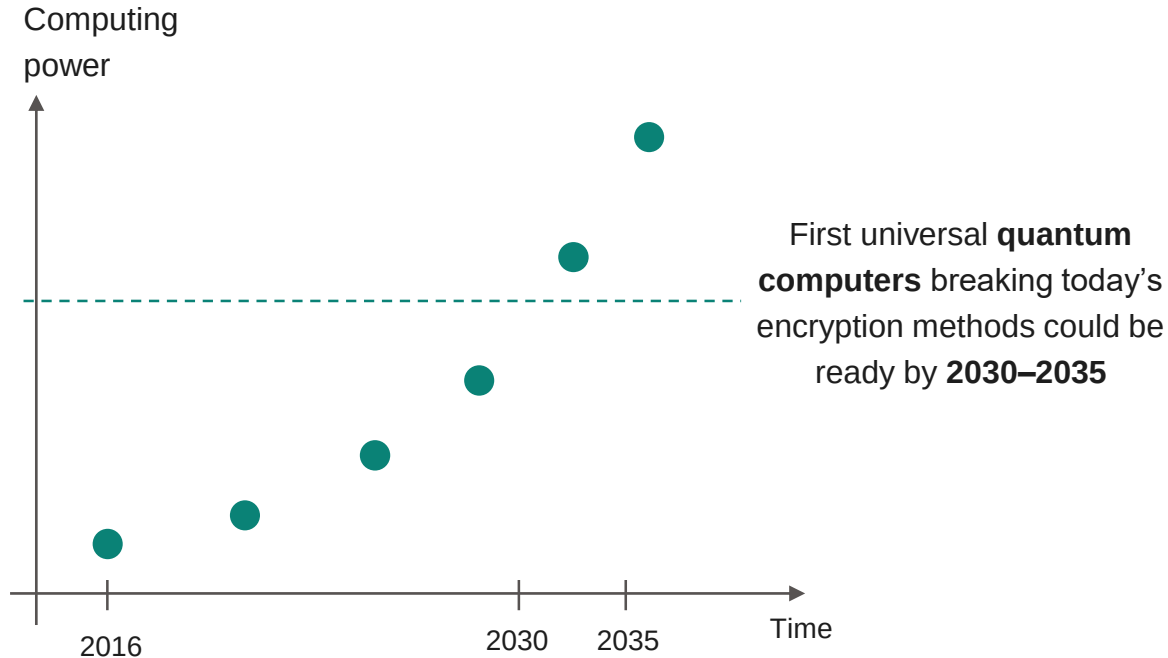
Customer application



Infineon is a trusted advisor for the PQC landscape with the rise of quantum computers leading to high security risks



Computing power of quantum computers



Cybersecurity

- **Asymmetric** encryption algorithms (e.g. RSA, ECC) lose appropriate security
- **Symmetric** encryption algorithms are less effected

Threats

- To **sensitive data** from governments and public institutions
- To **products** with long R&D cycles

Legislations

- Government bodies are **working on legislations** to prepare for quantum-safe future

Infineon's Post-quantum cryptography approach



Infineon is the **first company** to receive the **Common Criteria EAL6** for the implementation of a **PQC algorithm** in a security controller



Infineon **TEGRION™** product family of **next-gen security controllers** for long-lasting security and superior fault protection



Partnering with customers, partners, and the academic community to prepare for a post-quantum future



Global team of experts and researchers dedicated to the PQC field

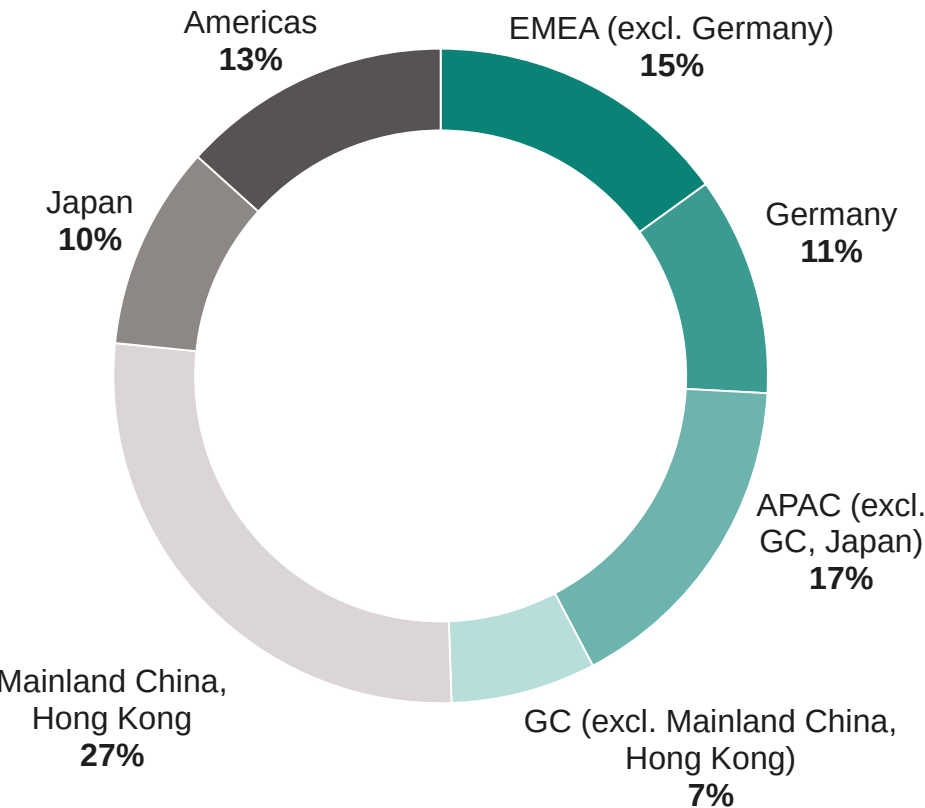
Selected financial figures



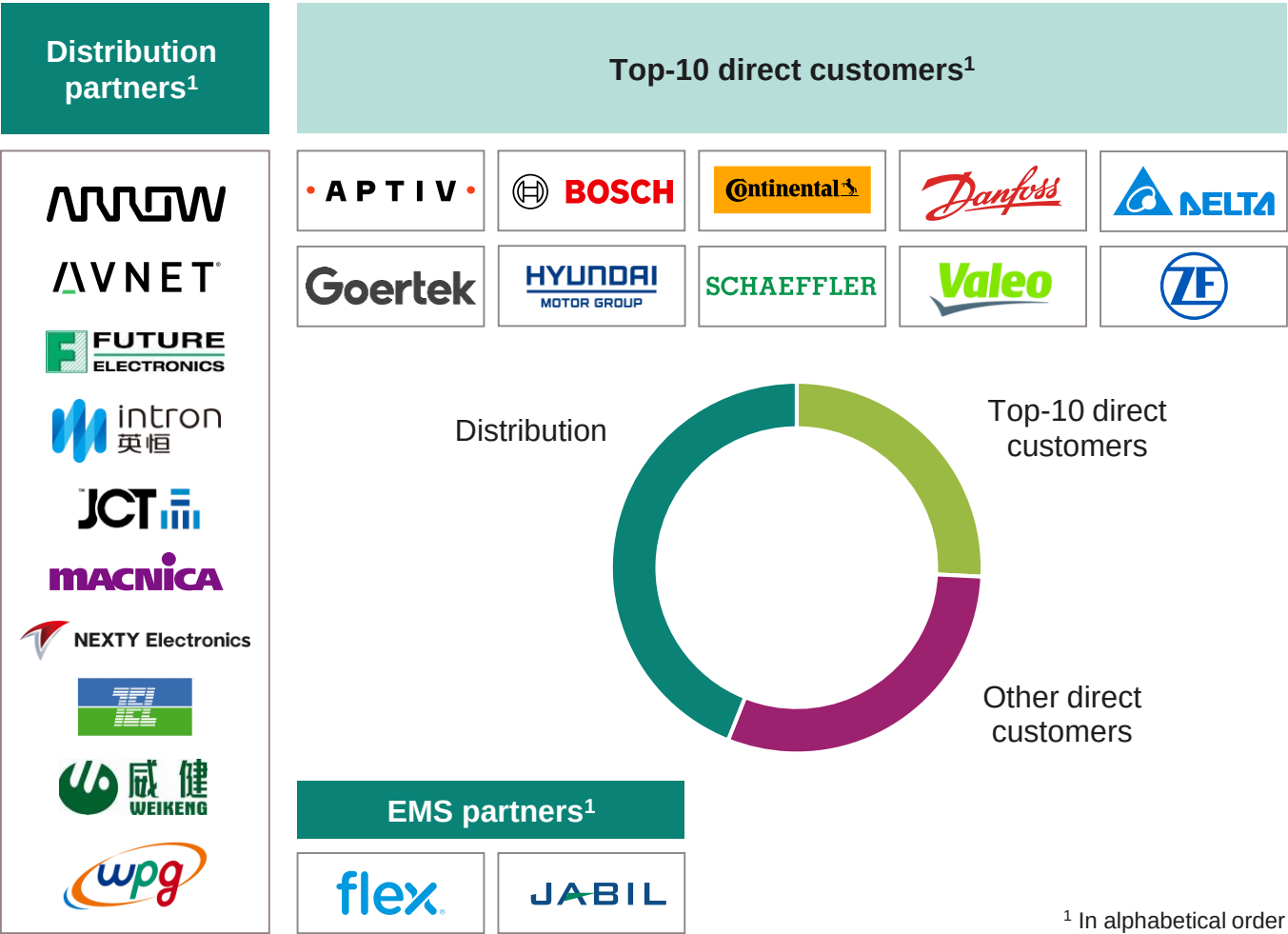
Strong presence in all regions; well-balanced customer portfolio;
no customer represents more than 10% of total sales



FY24 revenue by region



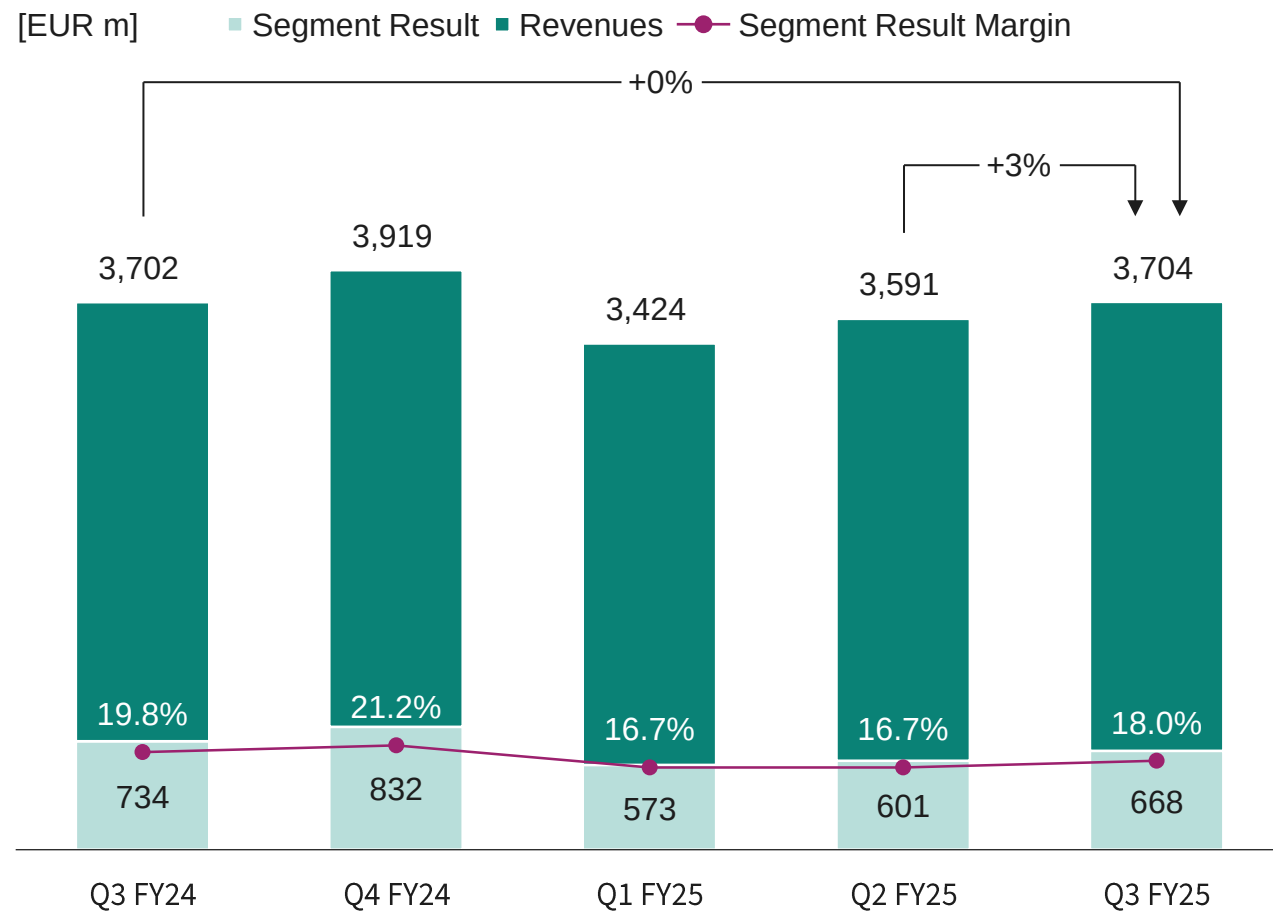
Revenue by sales channel



¹ In alphabetical order

Group financial performance

Revenues and Segment Result

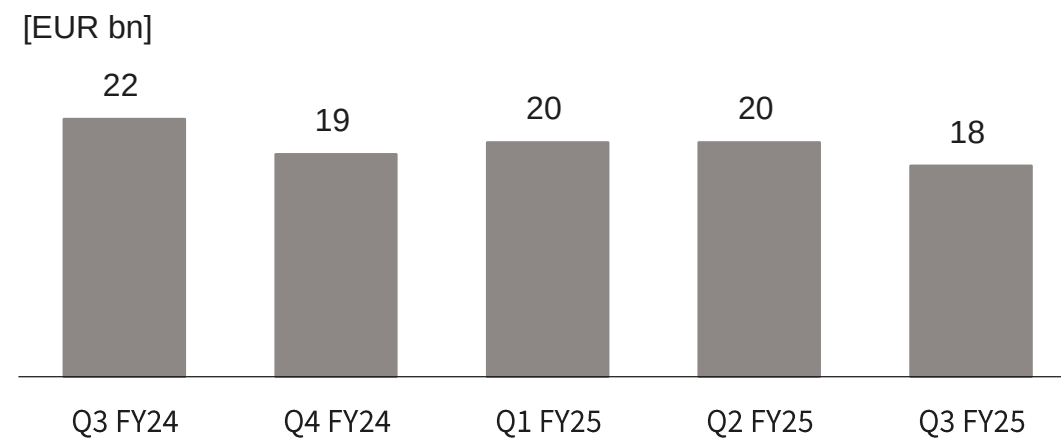


USD exchange rate

Average revenue exchange rate

	<u>Q3</u> <u>FY24</u>	<u>Q2</u> <u>FY25</u>	<u>Q3</u> <u>FY25</u>
Ø USD/EUR	1.08	1.05	1.14

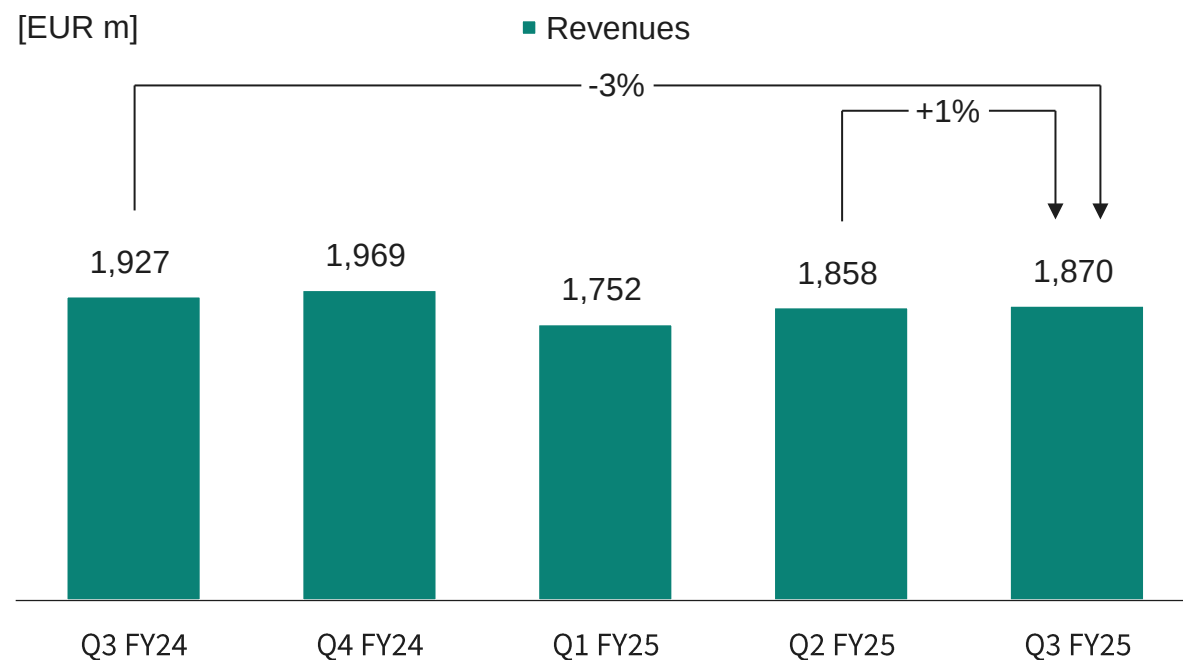
Order backlog¹



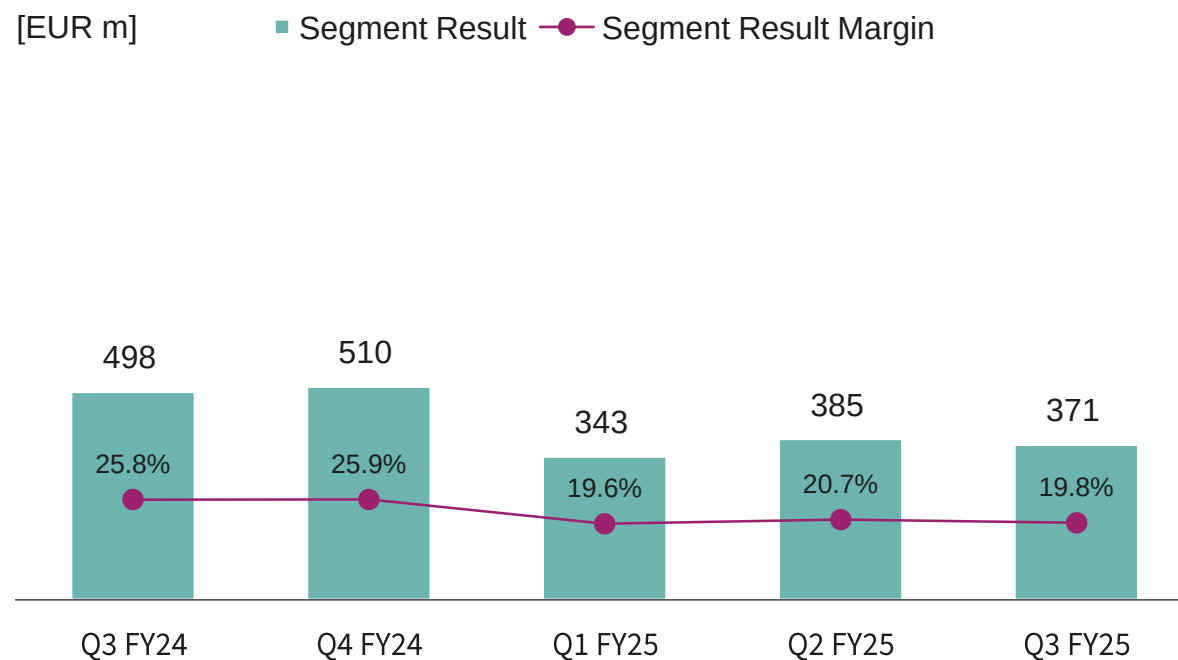
¹ See notes for definition

Automotive (ATV)

Revenues¹



Segment Result¹

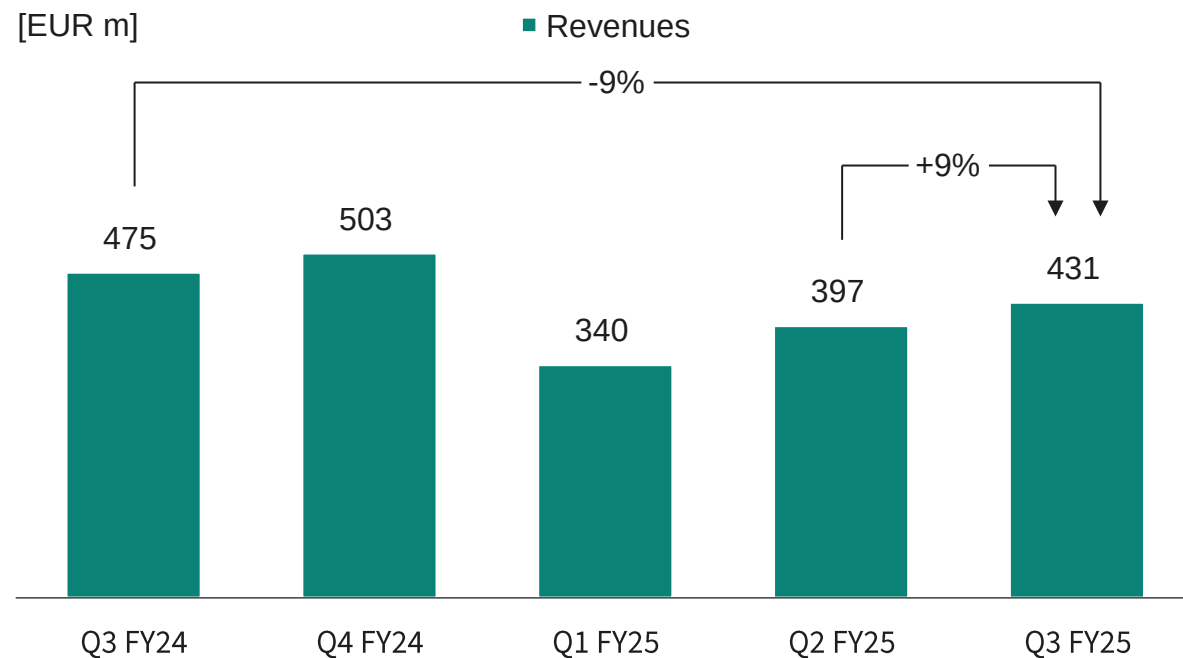


- Revenue slightly improved as customer destocking trends eased.
- Slight segment result decline due to currency and mix effects, overcompensating lower idle costs.
- Risk of customers lowering their inventory targets further due to financial constraints.

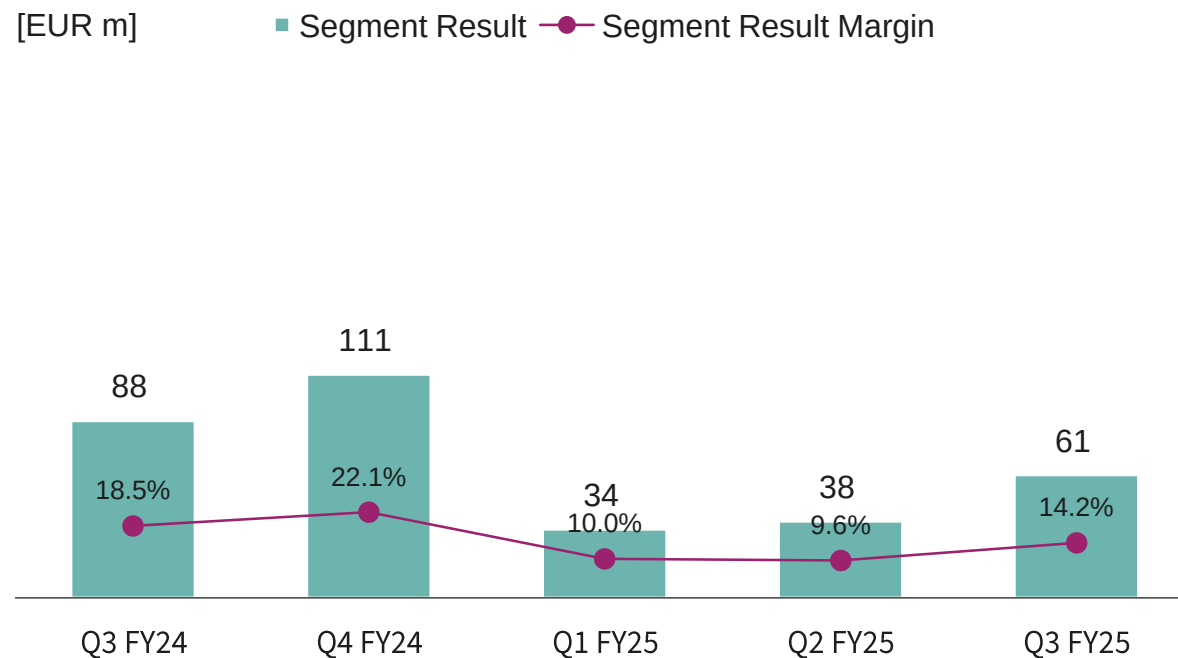
¹ Figures have been historically restated to reflect "Sense & Control" business line transfer of from ATV to PSS

Green Industrial Power (GIP)

Revenues



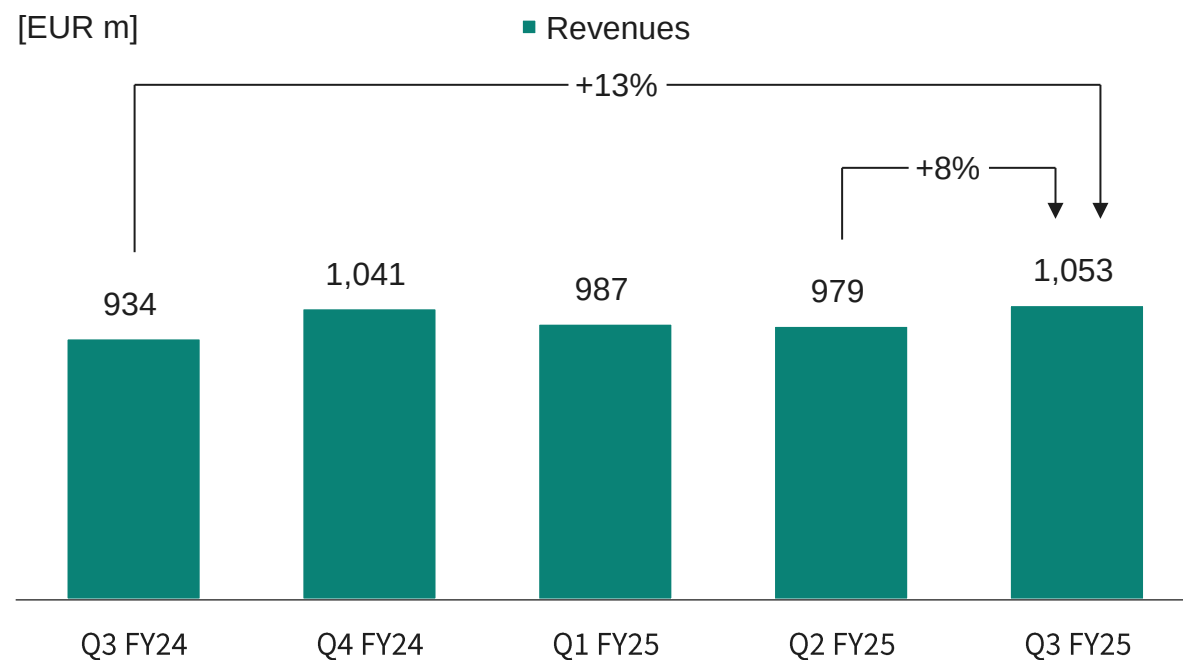
Segment Result



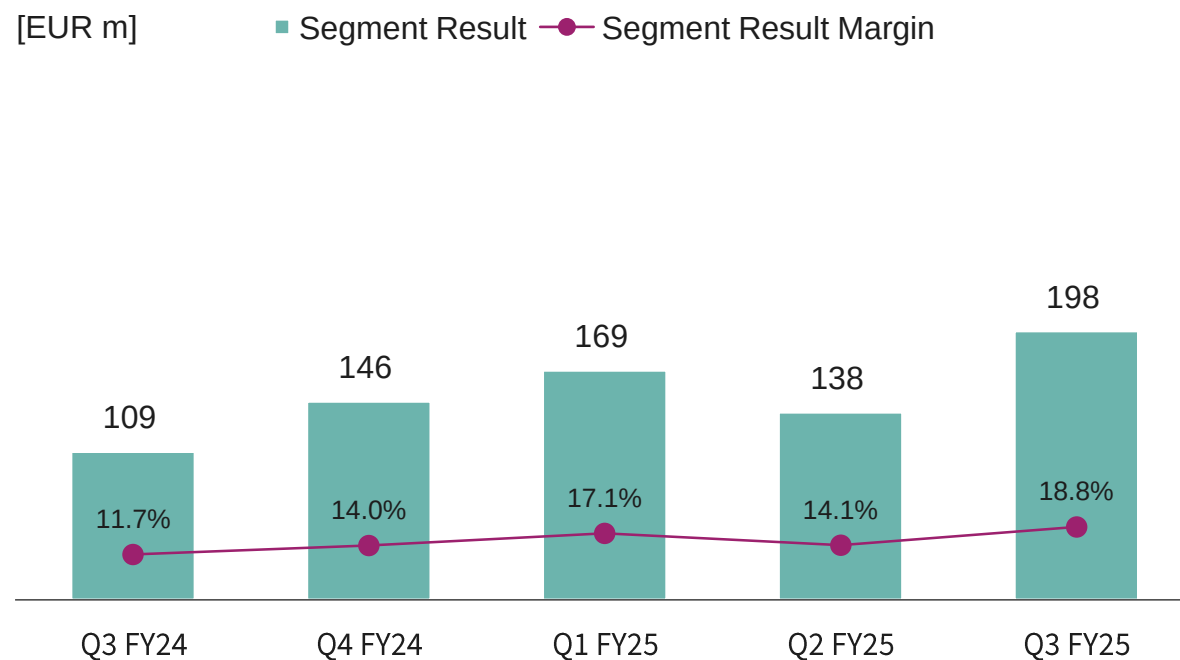
- Revenue increase, double digit at constant currency, driven by normalizing inventories and growth in key applications like power infrastructure
- Segment result increase due to volume growth and lower idle.
- Structural growth drivers continue to strengthen demand at more normalized inventory levels.

Power & Sensor Systems (PSS)

Revenues¹



Segment Result¹

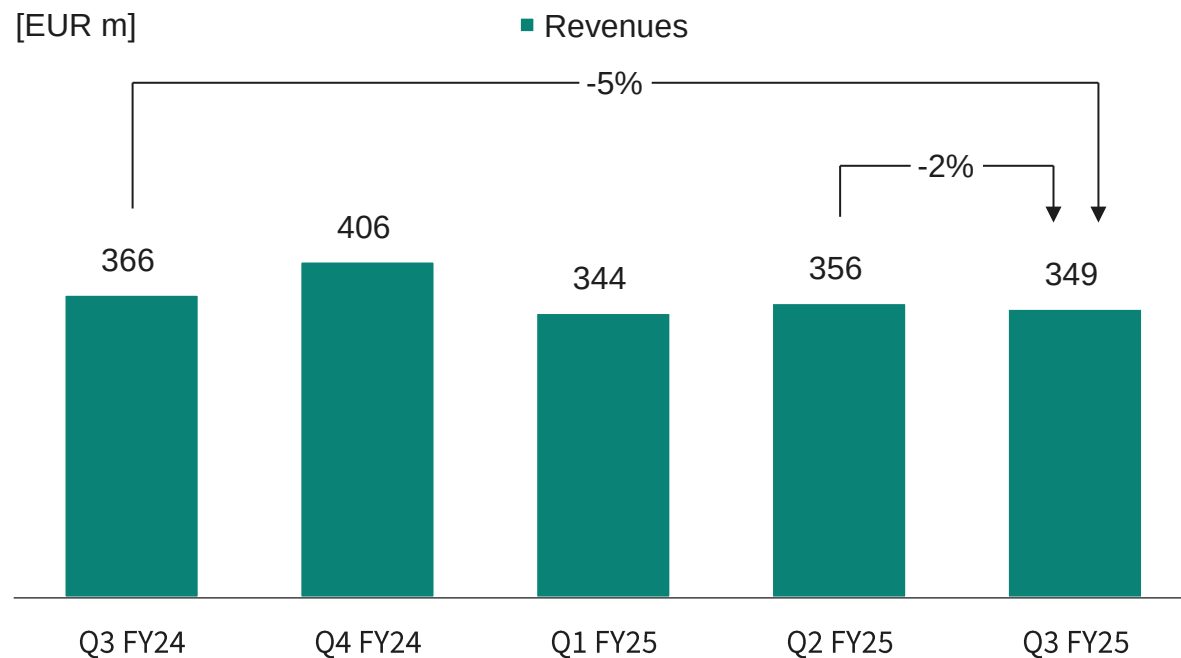


- Revenue growth momentum driven by the strength of power solutions for AI servers.
- Segment result margin increase due to higher volume and lower idle costs, offsetting the adverse currency effects.
- Strong growth in AI-related markets continues, demand for consumer related applications increased.

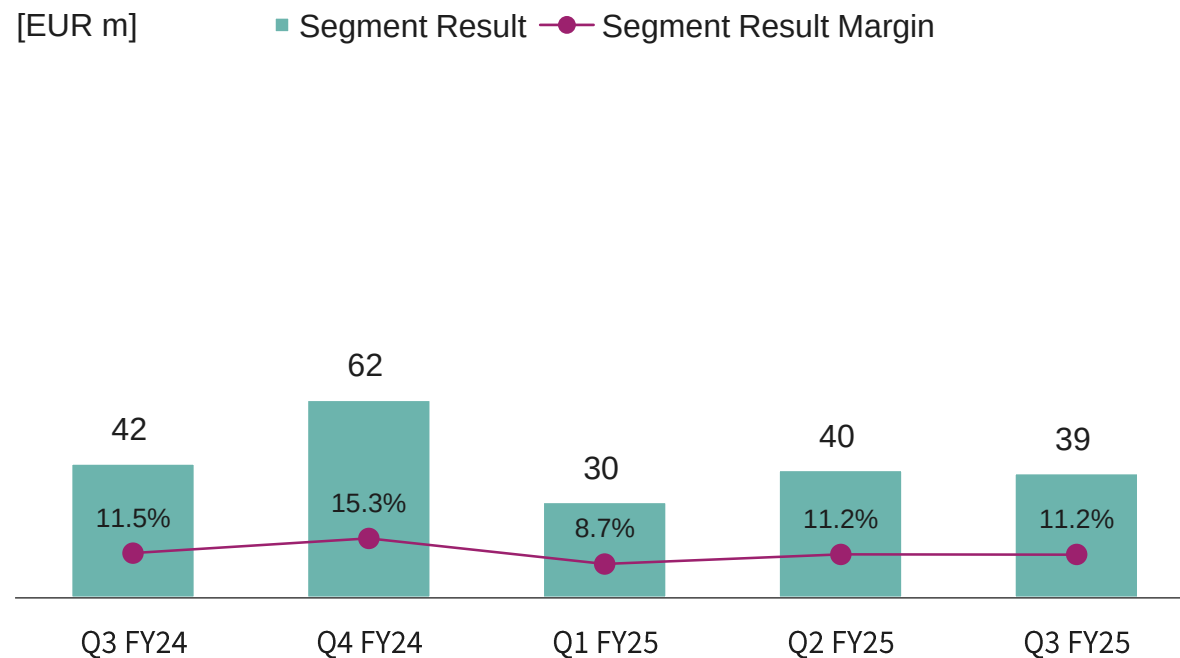
¹ Figures have been historically restated to reflect "Sense & Control" business line transfer of from ATV to PSS

Connected Secure Systems (CSS)

Revenues



Segment Result

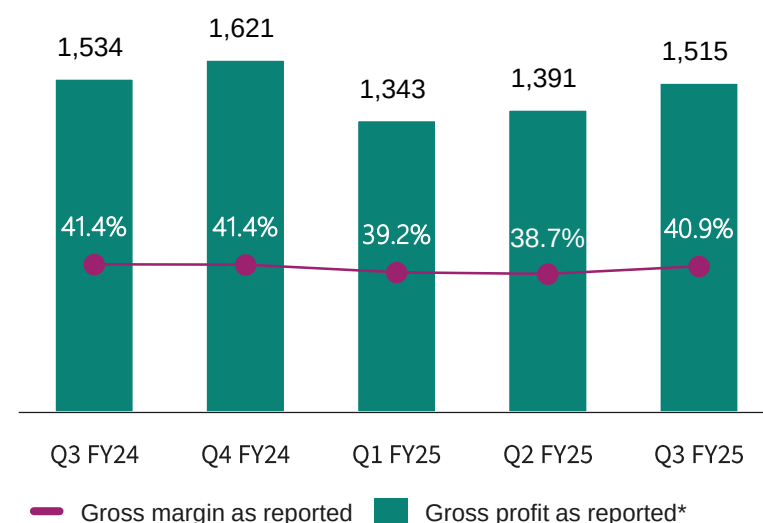


- Revenue decrease driven by adverse currency effects.
- Segment result margin stable.
- IoT and security markets move sideways as macroeconomic uncertainties persist weighing on consumer sentiment.

Gross margin and Opex

Gross profit¹

[EUR m]



Therein Non-Segment Result charges

[EUR m]

71	77	64	76	76
----	----	----	----	----

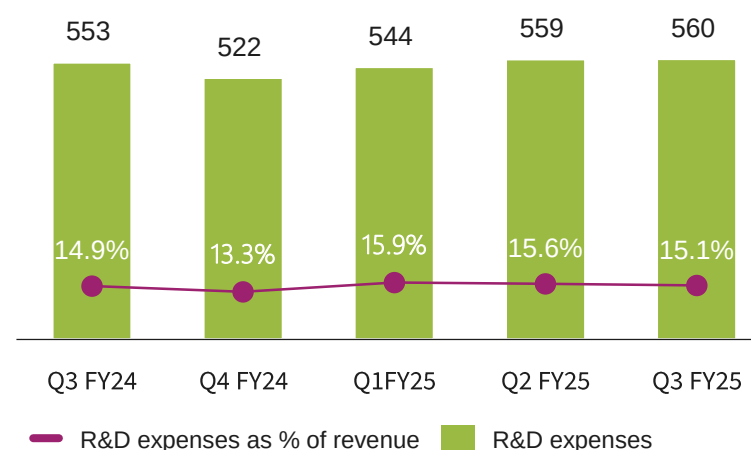
Adjusted gross margin¹

43.4%	43.3%	41.1%	40.9%	43.0%
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¹ To provide more meaningful information, Infineon changed its accounting policy on the allocation of certain expenses with effect from 1 October 2024. This resulted in expenses that were previously included in cost of goods sold being reclassified as research and development expenses. The prior-year figures have been adjusted accordingly.

R&D¹

[EUR m]



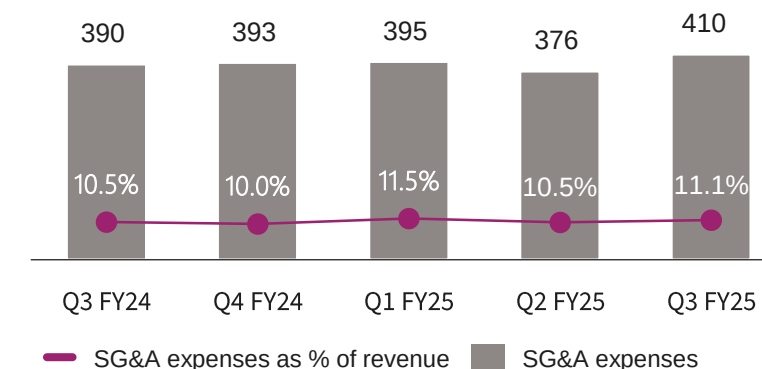
Therein Non-Segment Result charges

[EUR m]

15	14	18	14	18
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SG&A

[EUR m]



Therein Non-Segment Result charges

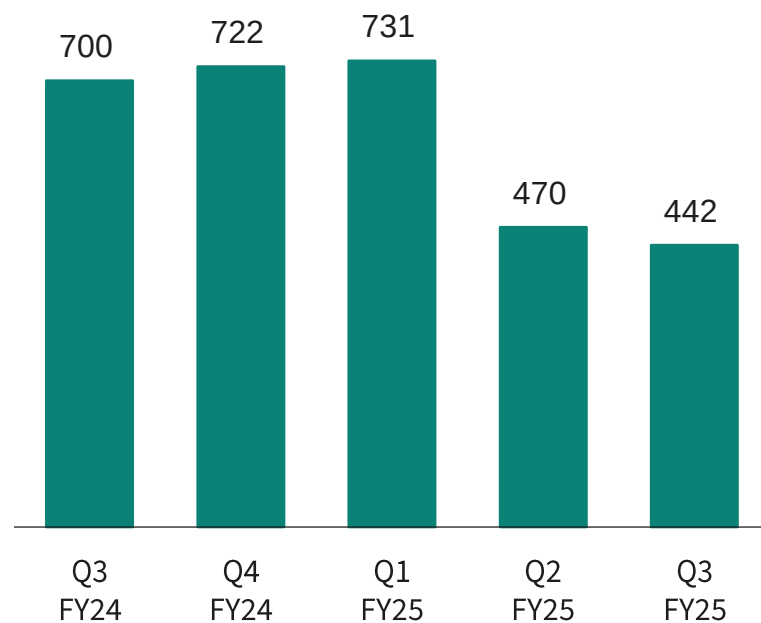
[EUR m]

54	48	56	53	50
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Investments, Depreciation & Amortization and Free Cash Flow

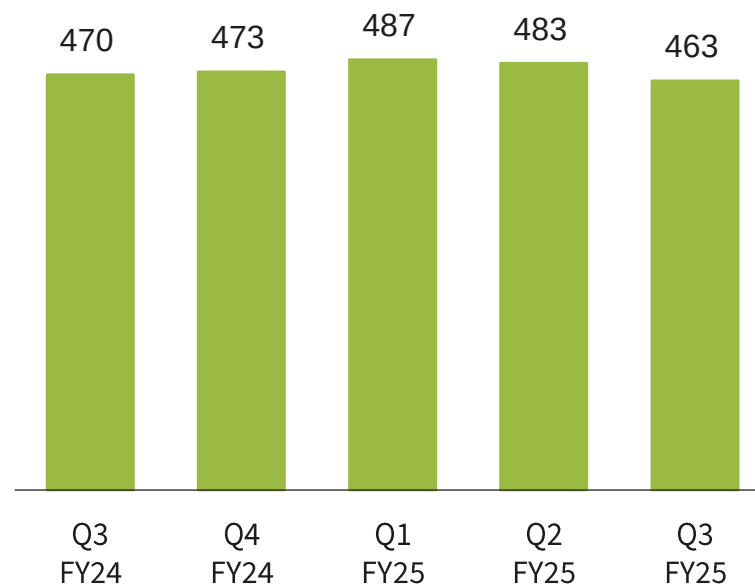
Investments

[EUR m]



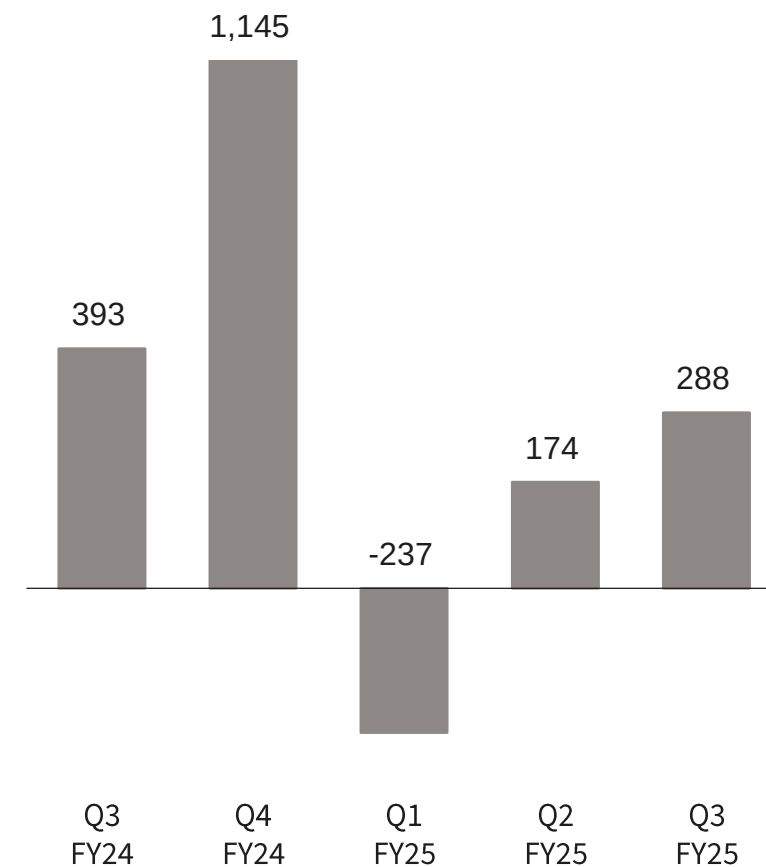
Depreciation & Amortization

[EUR m]



Free Cash Flow

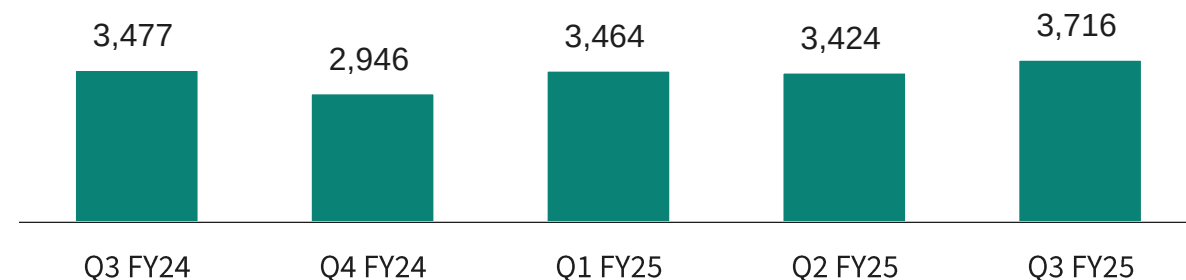
[EUR m]



Working capital, in particular trade working capital components

Working capital¹

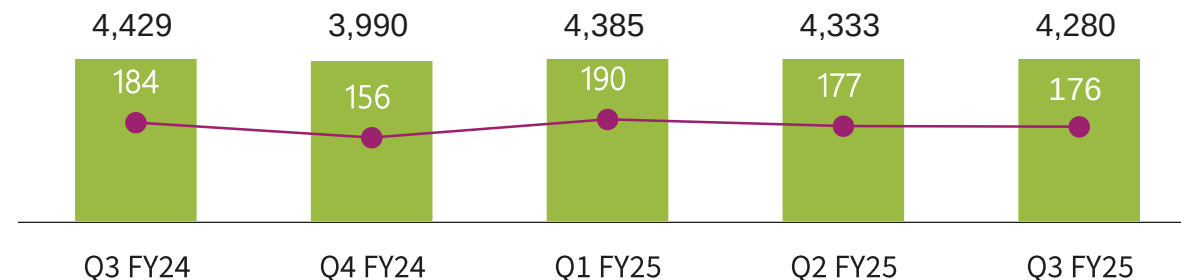
[EUR m]



Inventories

[EUR m]

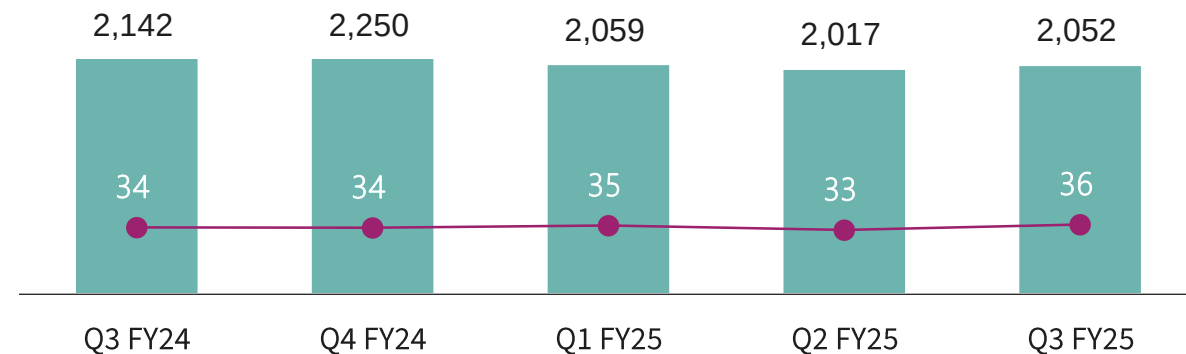
[days²]



Trade receivables

[EUR m]

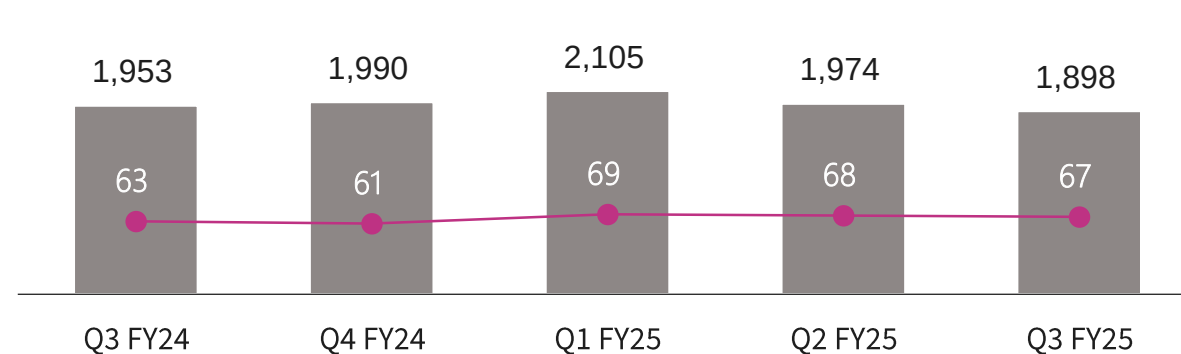
[days]



Trade payables

[EUR m]

[days²]



¹ See notes for definition

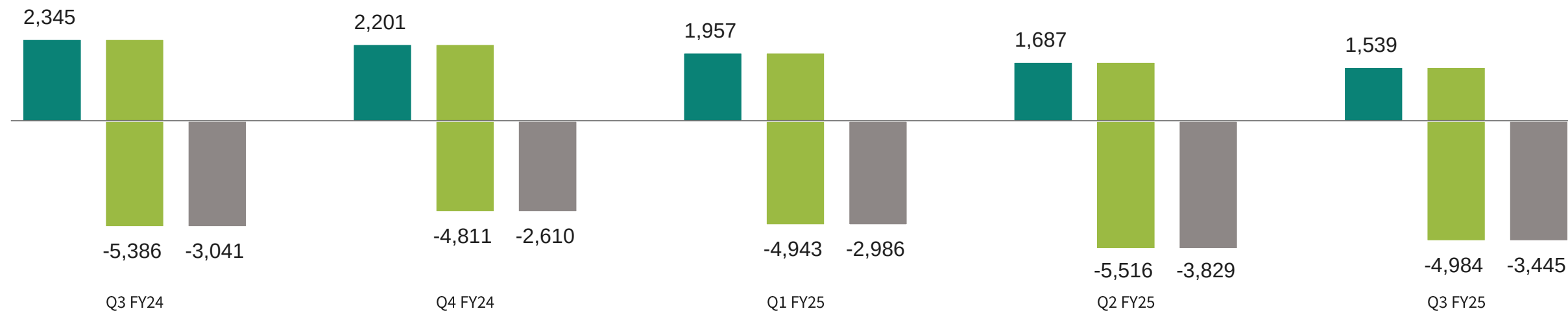
² To provide more meaningful information, Infineon changed its accounting policy on the allocation of certain expenses with effect from 1 October 2024. This resulted in expenses that were previously included in cost of goods sold being reclassified as research and development expenses. The prior-year figures have been adjusted accordingly

Development of liquidity and debt

Capital structure

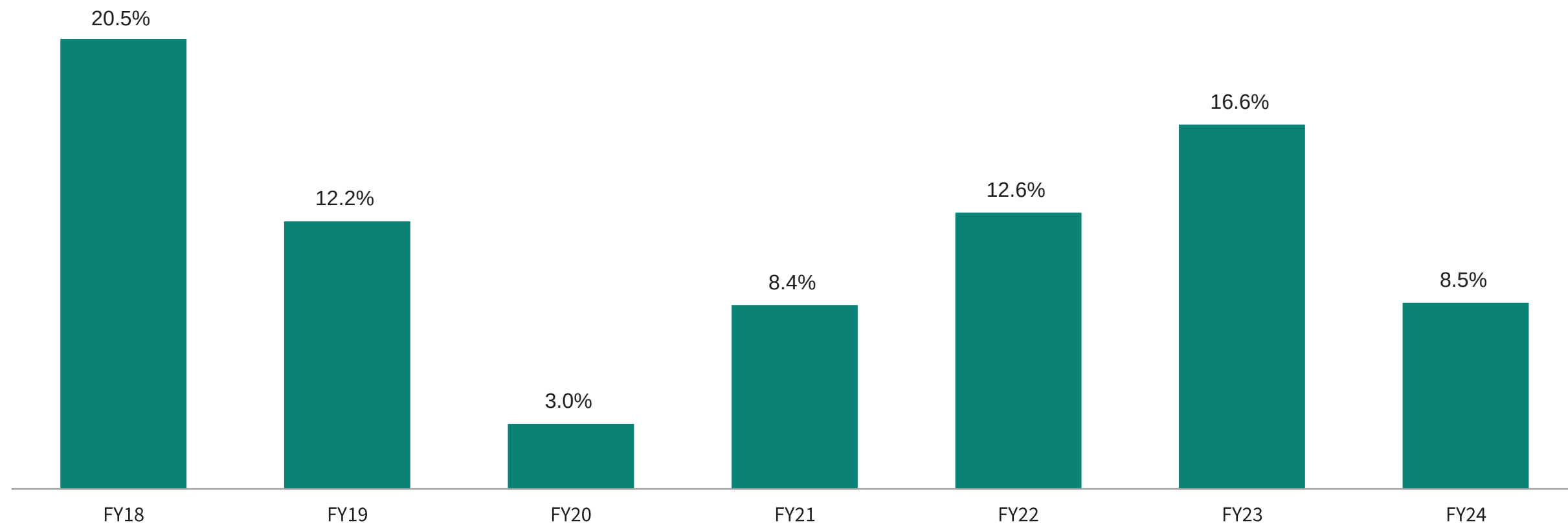
[EUR m]

■ Gross Cash ■ Gross Debt ■ Net Cash/Debt



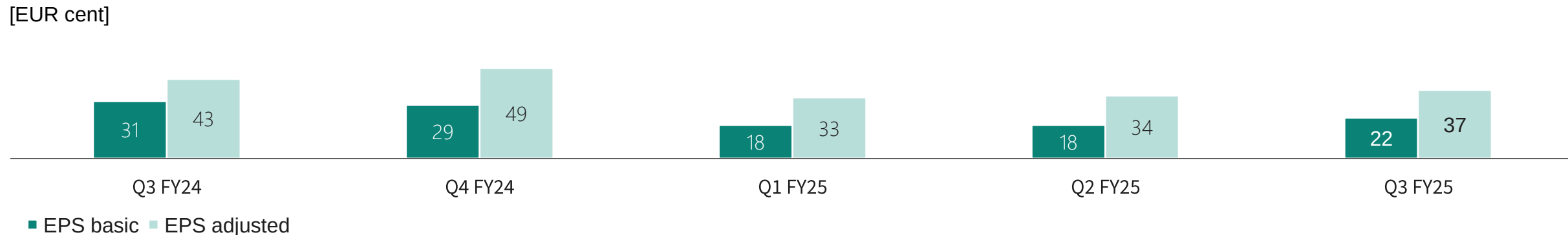
Return on capital employed

Historical development

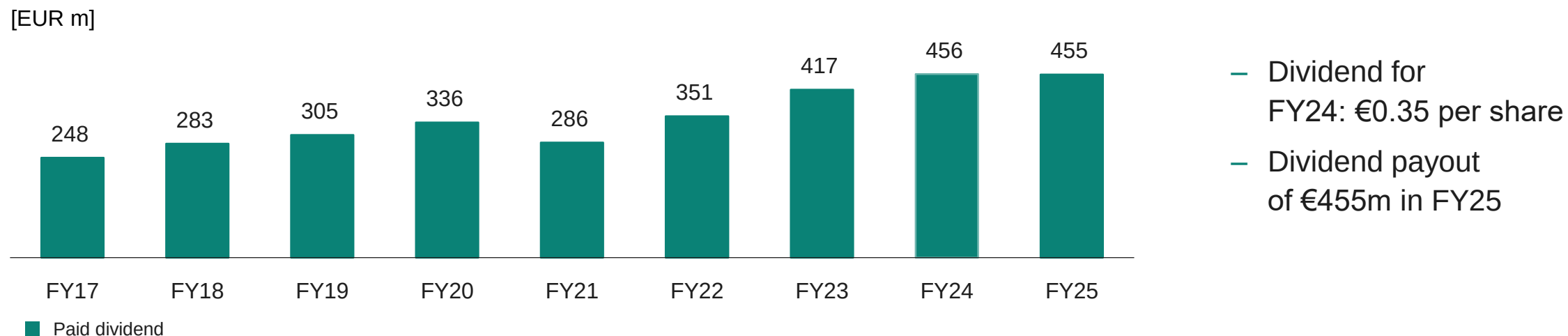


Earnings-per-share and total cash return

Development of earnings-per-share (EPS) from continuing operations



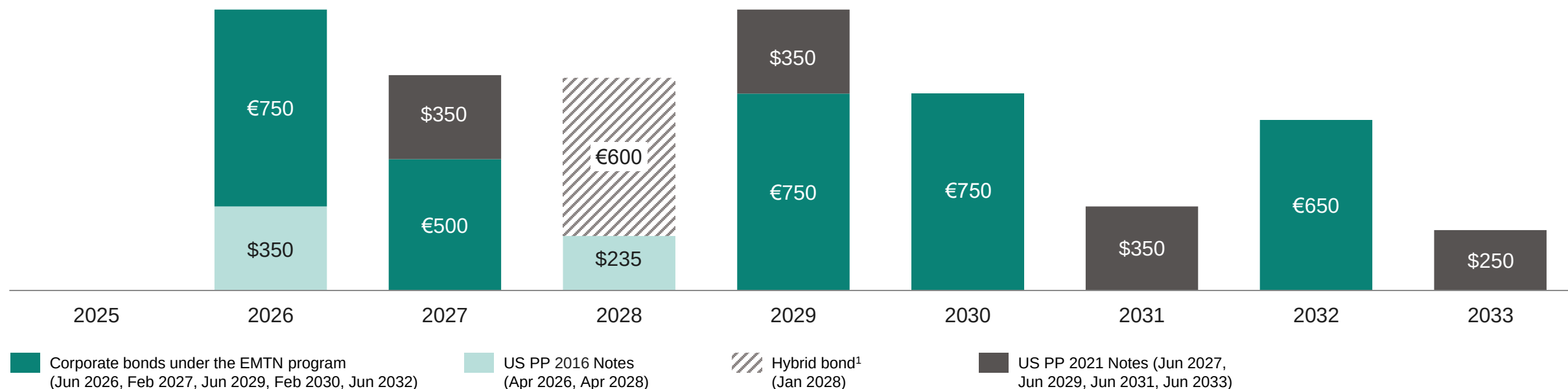
Total cash return to shareholders via dividends



Maturity profile

Calendar years 2025 to 2033

[EUR m; USD m; nominal values]



¹On 1 Oct 2019, Infineon issued a €600m perpetual hybrid bond with first call date in 2028; the hybrid bond is accounted as equity under IFRS.

Conservative financial policy and strict commitment to investment-grade rating are the basis for through-cycle flexibility



	Financial Policy Targets	Status Quo (LTM 30 June 2025)
Gross Cash ¹	At least 10% of revenue ³	11% of revenue → €1.5bn
Gross Debt ²	≤ 2.0x EBITDA	1.4x EBITDA
Comfortable liquidity position	— Flexibility for financing operating activities and investments through the cycle	
Balanced debt position	— Gross debt target commensurate with investment-grade rating — Successful de-leveraging offers ample headroom	
Rating	Investment grade	BBB+ stable outlook (by S&P Global Ratings)

¹ Gross cash position is defined as cash and cash equivalents plus financial investments | ² Gross debt is defined as short-term debt and current maturities of long-term debt plus long-term debt. EBITDA is calculated as the total of earnings from continued operations before interest and taxes plus scheduled depreciation and amortization | ³ Gross cash target: At least 10 percent of revenue on average throughout the fiscal year



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Disclaimer

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Glossary

AC	alternating current
ACC	adaptive cruise control
AD	automated driving
ADAS	advanced driver assistance system
AEB	autonomous emergency braking
AI	artificial intelligence
AR/VR	augmented/virtual reality
BEV	battery electric vehicle
BLE	Bluetooth low energy
BMS	battery management system
BoM	bill of materials
CAV	commercial, construction and agricultural vehicles
CMOS	complementary metal-oxide-semiconductor
DC	direct current
DSC/SSC	double/single sided cooling
E/E	electrical/electronic architecture
ECU	electronic control unit
EDC	electrical design current
eSE	embedded secure module
eSIM	embedded subscriber identity module
EMS	electronics manufacturing service
ESS	energy storage system
EV	electric vehicle
FCEV	fuel cell electric vehicle
FHEV/MHEV	full/mild hybrid electric vehicle
FoM	figure of merit
F-RAM	ferroelectric memory
GaN	gallium nitride
HEMT	high-electron-mobility transistor
HID	human interface device
HMI	human machine interaction
HV	high voltage
HVAC	heating, ventilation, air conditioning
IC	integrated circuit
ICE	internal combustion engine

IGBT	insulated gate bipolar transistor
IoT	internet of things
IPM	intelligent power module
LED	light-emitting diode
MCU	microcontroller unit
MEMS	micro electro-mechanical system
MHA	major home appliances
MIMO	multiple input, multiple output
ML	machine learning
MNO	mobile network operator
MOSFET	metal-oxide silicon field-effect transistor
MV	medium voltage
NFC	near-field communication
OBC	on-board charger
OEM	original equipment manufacturer
P2S	Infineon's strategic product-to-system approach
PD	power delivery
PHEV	plug-in hybrid electric vehicle
PMIC	power management integrated circuits
PoL	point of load
PUE	power usage effectiveness
PSU	power supply unit
PV	photovoltaic
RAM	random access memory
RF	radio frequency
SAE	Society of Automotive Engineers
SDK	software development kit
Si	silicon
SiC	silicon carbide
SNR	signal-to-noise ratio
SoC	system-on-chip / state of charge
TDC	thermal design current
ToF	time-of-flight
UWB	ultra-wideband
WBG	wide-band gap, specifically referring to SiC and GaN based devices

Notes and ESG footnotes

Investments =	'Purchase of property, plant and equipment' + 'Purchase of intangible assets and other assets' incl. capitalization of R&D expenses
Capital Employed =	'Total assets' – 'Cash and cash equivalents' – 'Financial investments' – 'Assets classified as held for sale' – ('Total Current liabilities' – 'Short-term debt and current maturities of long-term debt' – 'Liabilities classified as held for sale')
RoCE =	Operating profit from continuing operations after tax/Capital Employed = ('Operating profit' – 'Financial result excluding interest result' – 'Share of profit (loss) of associates and joint ventures accounted for using the equity method'-'Income tax')/Capital Employed
Working Capital =	('Total current assets' – 'Cash and cash equivalents' – 'Financial investment' – 'Assets classified as held for sale') – ('Total current liabilities' – 'Short term debt and current maturities of long-term debt' – 'Liabilities classified as held for sale')
DIO (days inventory outstanding; quarter-to-date) =	('Net Inventories'/'Cost of goods sold') x 90
DPO (days payables outstanding; quarter-to-date) =	('Trade payables'/'[Cost of goods sold' + 'Purchase of property, plant and equipment']') x 90
DSO (days sales outstanding; quarter-to-date) =	('Trade receivables' - 'reimbursement obligations') ¹ /'revenue' x 90

Order backlog = The total amount of orders received regardless of their current status

ESG footnotes:

- 1) This figure takes into account manufacturing, transportation, own vehicles, travel, raw materials and consumables, chemicals, water/waste water, direct emissions, energy consumption, waste, etc. as well as direct and indirect energy-related emissions by manufacturing service providers. It is based on data collected internally and publicly available conversion factors and relates to the 2021 fiscal year.
- 2) This figure is based on internally established criteria, which are described in the explanatory notes. The figure relates to the 2020 calendar year and takes into account the following application areas: automotive, LED, induction cookers, servers, renewable energy (wind, photovoltaic) and cell phone chargers as well as drives. CO₂ savings are calculated based on the potential savings generated by technologies in which semiconductors are used. The CO₂ savings are allocated based on Infineon's market share, semiconductor share, and the lifetime of the technologies concerned, based on internal and external experts' estimations. Despite the fact that carbon footprint calculations are subject to imprecision due to the complex issues involved, the results are nevertheless clear.
- 3) Carbon neutrality is defined in terms of Scope 1 and Scope 2 emissions.

¹ Without debtors with credit balances

Financial calendar

Date	Event	Location
25 – 26 August 2025	Jefferies Global Semiconductor, IT Hardware & Communications Technology Conference	Chicago
28 August 2025	Deutsche Bank Technology Conference	Dana Point, California
3 September 2025	Deutsche Bank Access European TMT Conference	London
3 September 2025	Citi Global Technology Conference	New York
8 September 2025	Goldman Sachs Communacopia + Technology Conference	San Francisco
22 September 2025	Berenberg and Goldman Sachs German Corporate Conference	Munich
24 September 2025	BNP Paribas Exane ESG Conference	Paris
12 November 2025 ¹	Earnings Release for the Fourth Quarter and the 2025 Fiscal Year	

¹ Preliminary

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