

# SANDVIK MINING AND ROCK SOLUTIONS

## CAPITAL MARKETS DAY 2020



**HENRIK AGER**

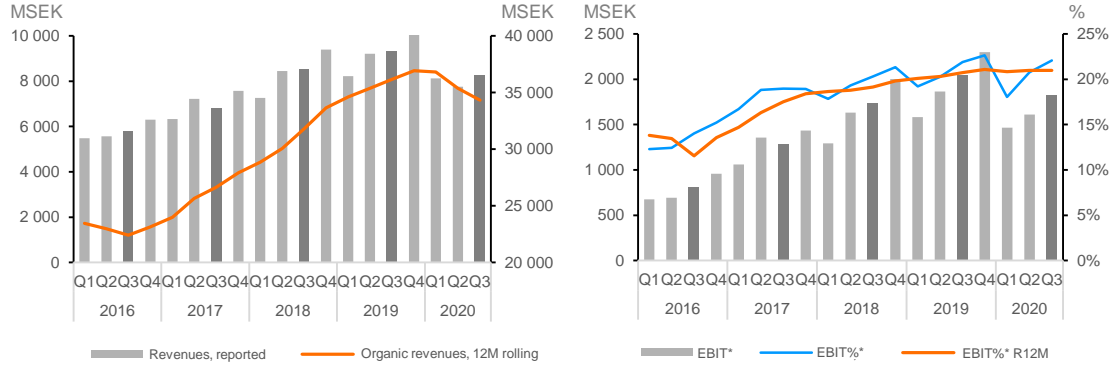
President

November 3, 2020

# SMR IN BRIEF

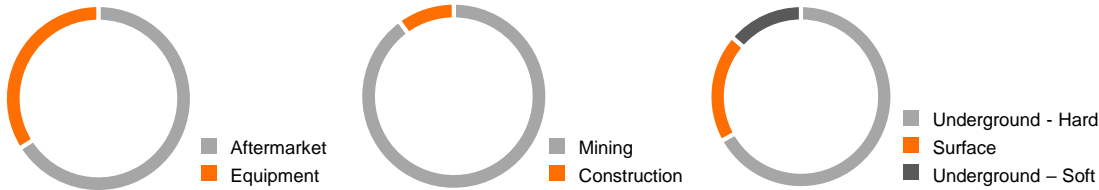
## SALES AND EBIT DEVELOPMENT

(FY2019 ROCE 36%)



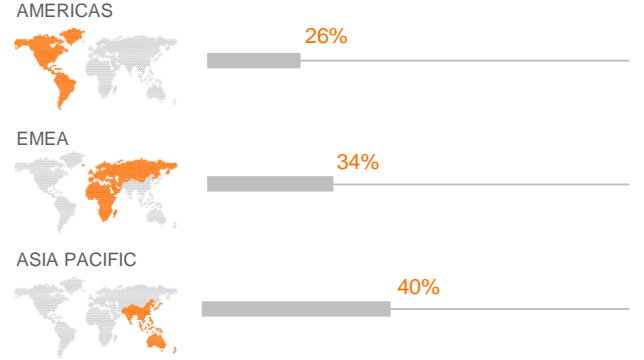
\*Adjusted for Items Affecting Comparability

## SALES BY SEGMENTS



Rolling 12 months Q419 – Q320

## GEOGRAPHY

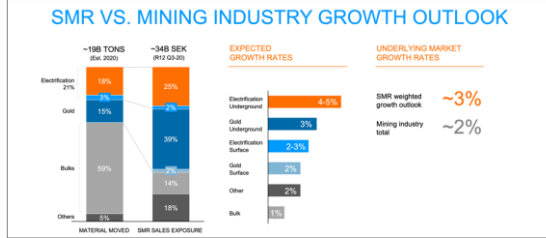


Rolling 12 months Q419 – Q320



# TRENDS SHAPING MINING NOW AND GOING FORWARD

## DIFFERENT DEVELOPMENT FOR DIFFERENT COMMODITIES



## DRIVE FOR PRODUCTIVITY



## SHIFT TO DIGITALIZATION AND AUTOMATION



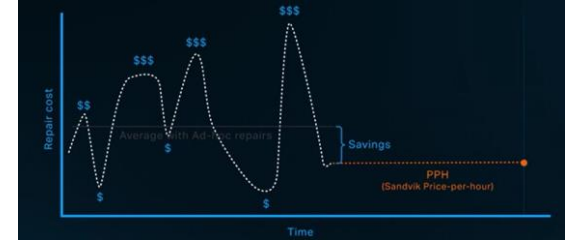
## ELECTRIFICATION AND ENERGY EFFICIENCY GAIN MOMENTUM



## GEOPOLITICAL REBALANCING AND NATIONALISM



## CUSTOMERS DEMAND OPTIONS AND RISK SHARING



# VISION AND STRATEGIC FOCUS AREAS

To be the preferred solutions partner in our customers' journey to performance leadership



**SAFE AND SUSTAINABLE**



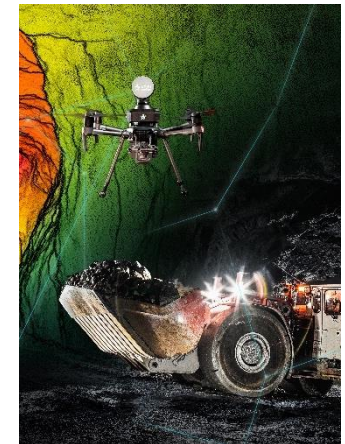
**DELIVER CUSTOMER VALUE**



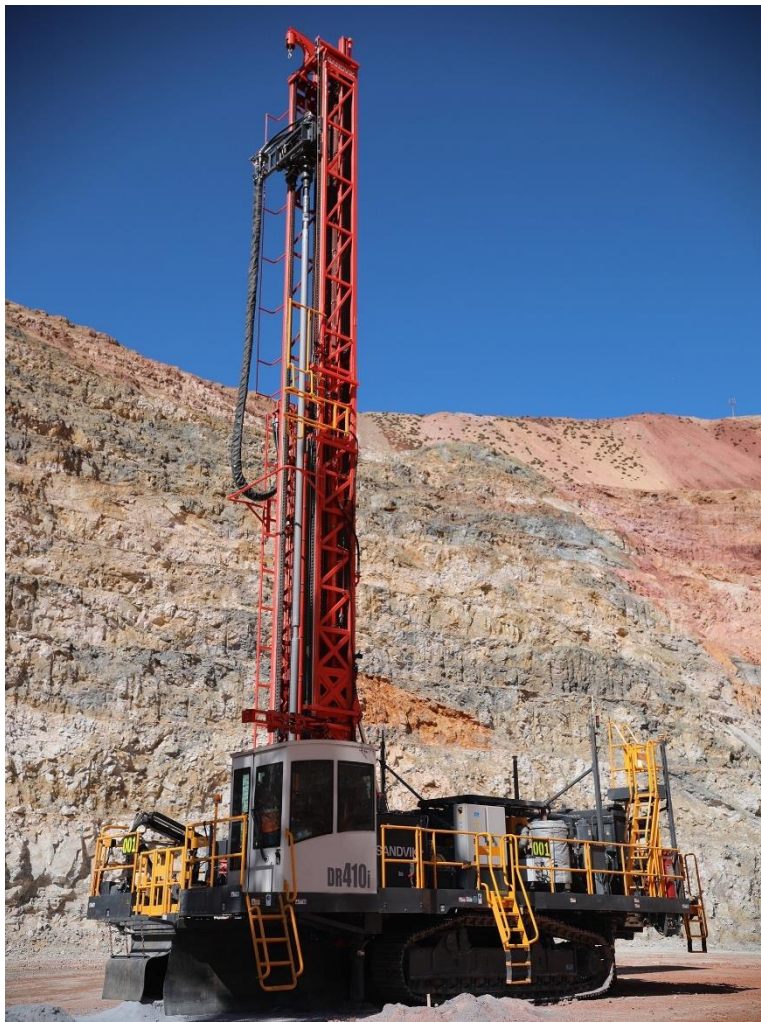
**SHAPE THE INDUSTRY ECOSYSTEM**



**AGILE EXECUTION WITH EXCEPTIONAL PEOPLE**



**EVOLVE PORTFOLIO AND PARTNERSHIPS**



# SETTING UP FOR GROWTH

Focus on fast growing commodities

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Grow share in core

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Expand aftermarket offering

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Lead automation, digitalization and electrification

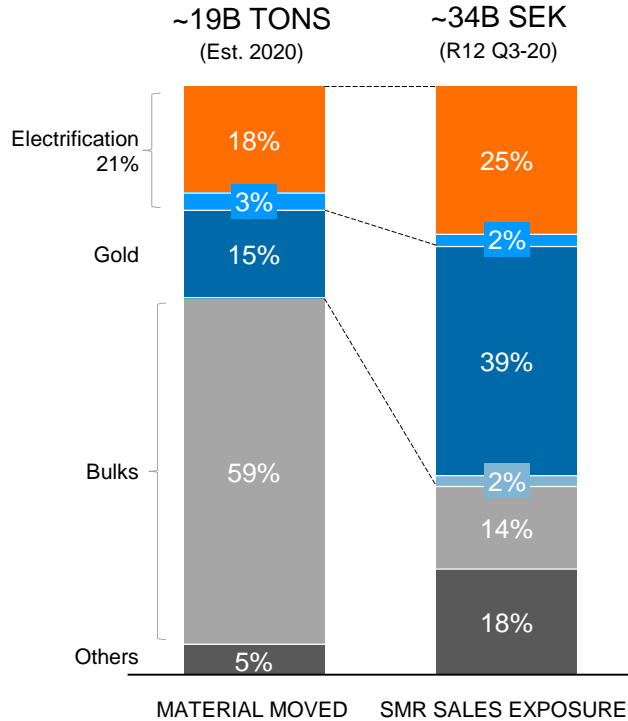
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Accelerate Mergers and Acquisitions

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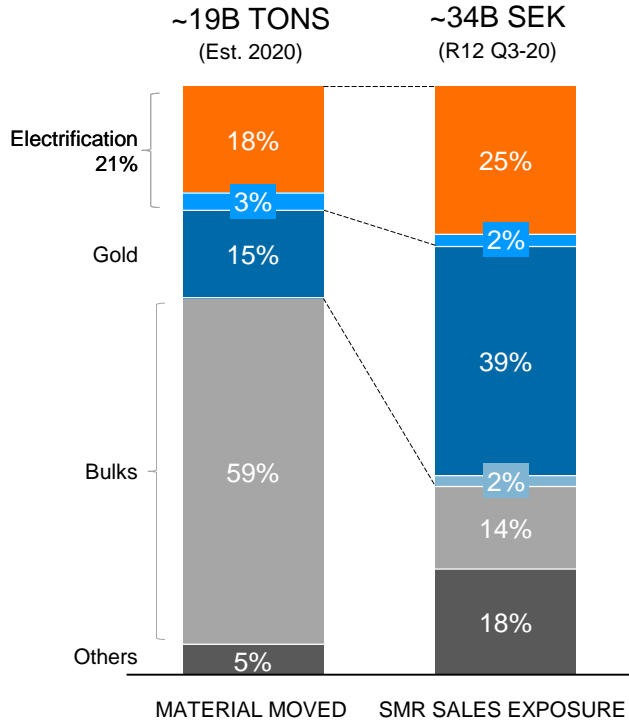


# FOCUS ON FAST GROWING COMMODITIES

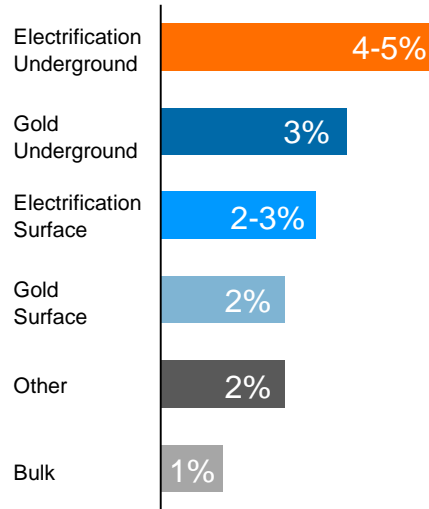


6 Electrification = Copper, Zinc, Nickel, Lead  
 1 Other commodities: ~1/3 PGMs and ~2/3 other metals (e.g. silver, uranium) & minerals (e.g. salt, potash)

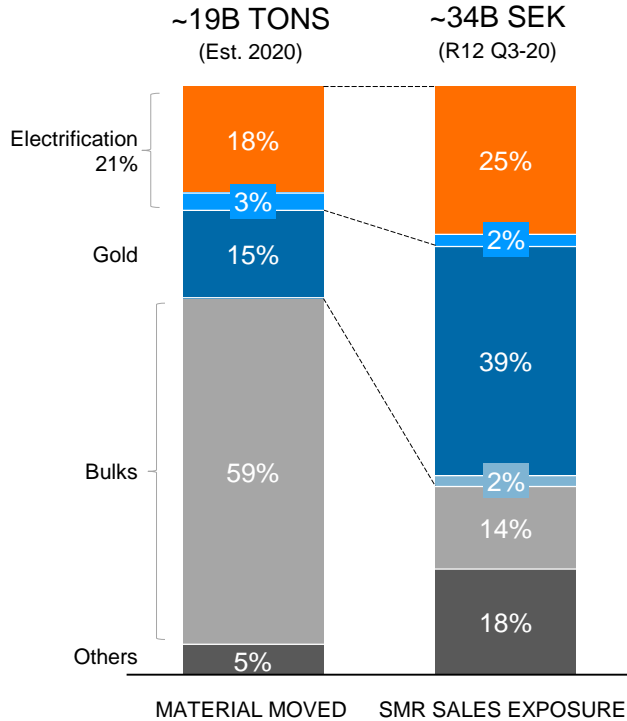
# FOCUS ON FAST GROWING COMMODITIES



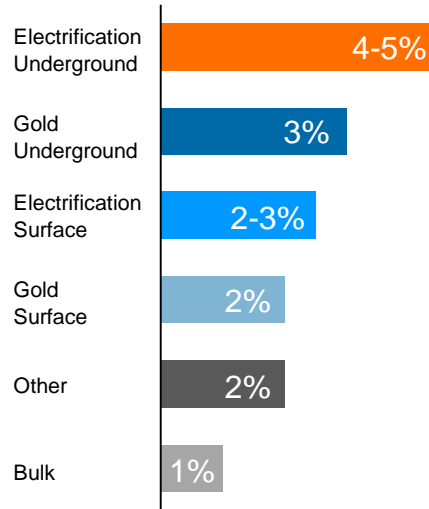
## EXPECTED GROWTH RATES



# FOCUS ON FAST GROWING COMMODITIES



## EXPECTED GROWTH RATES



## UNDERLYING MARKET GROWTH RATES





# Grow share in core: Surface drilling



## NEW OFFERING

- New DTH & Rotary offering
- XL Tophammer
- Performance Rock Tools
- Best in class TCO



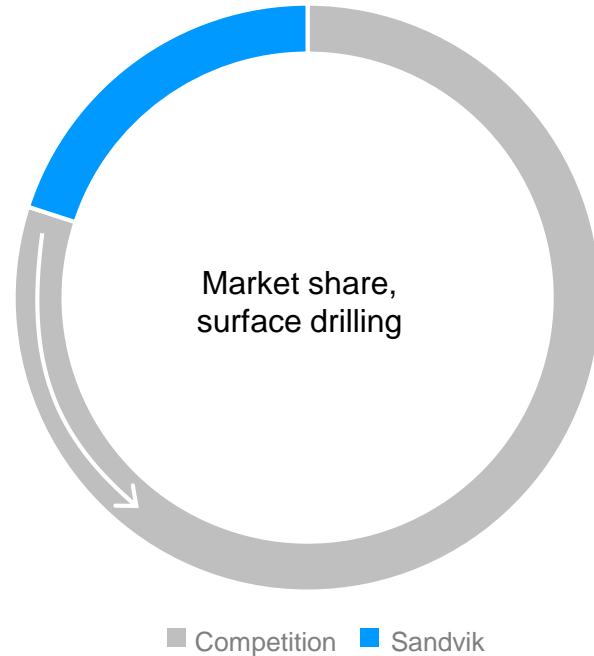
## SURFACE AUTOMATION

- Scalable options
- Multi-machine control
- 3rd party integration



## LOCAL EXPERTISE

- Field service upgrade
- Remote monitoring
- Intelligent supply chain



# Expand aftermarket offering



High performance Sandvik materials and designs



PERFORMANCE



On site expertise in world class supply chains



RELIABILITY



Connected offering with performance analytics



PREDICITABILITY

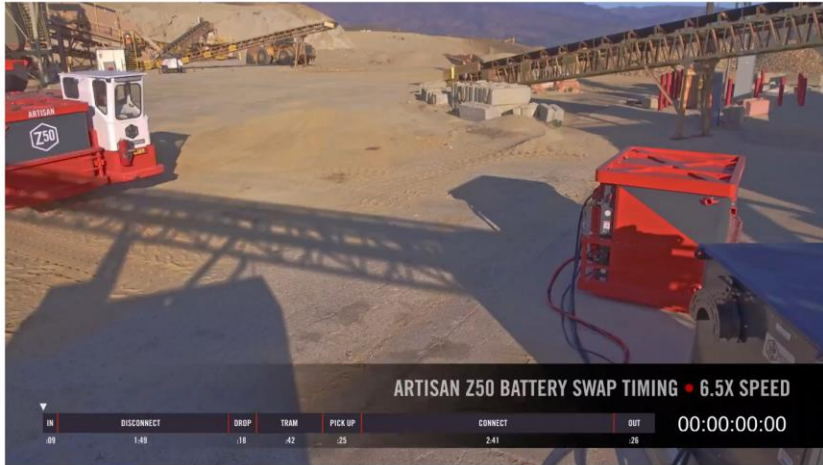


Innovative business models and financial solutions

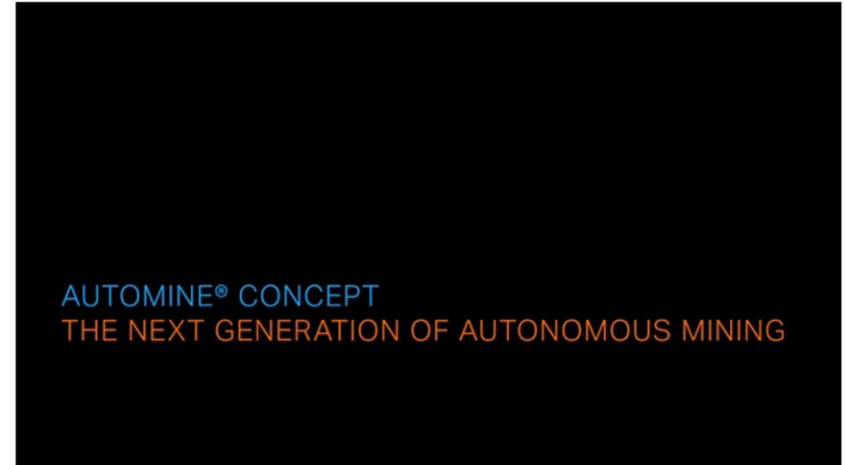


FLEXIBILITY

# Lead automation, digitalization and electrification



Bev battery swapping



Automine® concept vehicle

# Accelerate Mergers and Acquisitions

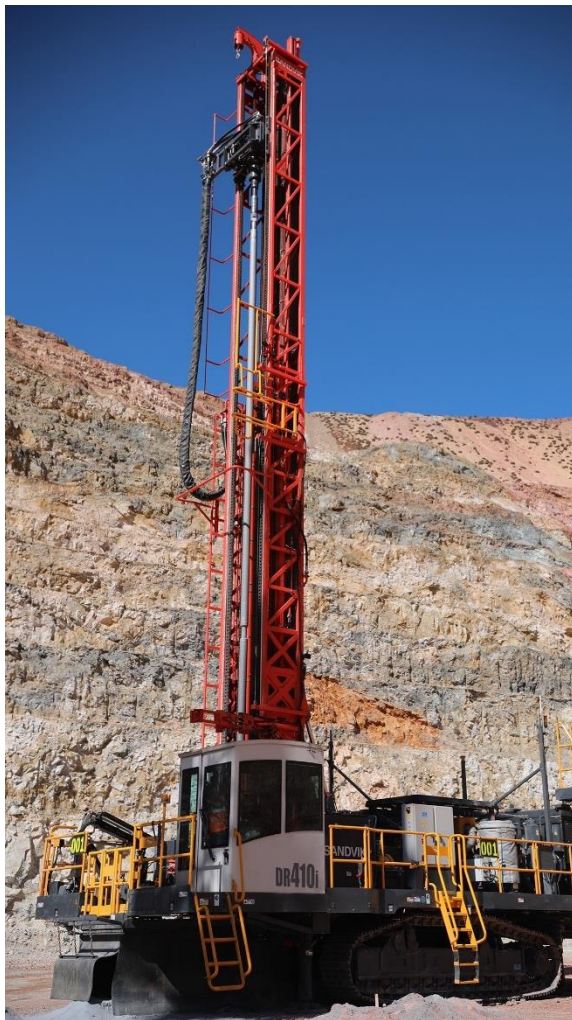
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## ACQUISITIONS



## PARTNERSHIPS





# SETTING UP FOR GROWTH

Focus on fast growing commodities

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Grow share in core

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Expand aftermarket offering

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Lead automation, digitalization and electrification

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Accelerate Mergers and Acquisitions

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→ **2x**  
MARKET  
GROWTH



**SANDVIK**

The logo consists of the word "SANDVIK" in a bold, blue, sans-serif font. Below the text is a solid blue horizontal bar. The entire logo is enclosed within a thin blue rectangular border.