

manage energy better
together



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This presentation may contain information regarding alternative performance measures such as reported EBITDA, Adjusted EBITDA, Adjusted Gross Profit, Adjusted Research and Development, Adjusted Sales, General and Administrative, and Adjusted Operating Expenses. Definitions of these measures and reconciliations between such measures and their USGAAP counterparts if not defined in the presentation may be found in the ‘Supplemental Reconciliations and Definitions’ section on pages 34 to 37 of the Landis+Gyr Half Year Report 2020 on the website at www.landisgyr.com/investors/results-center.

Agenda

14:00 – 15:20 CET

Progress Update
Midterm Guidance & Dividend Policy
Market & Regional Update
Strategic Priorities & Plan for Growth

15:20 – 15:25 CET

Guest Speaker Sharon Johnson - British Gas

15:25 – 15:55 CET

Guest Speaker Carlos Nouel - National Grid

15:55 – 16:15 CET

Break

16:15 – 16:30 CET

Fireside Chat with Rob Enslin - Google Cloud & Werner Lieberherr

16:30 – 17:30 CET

Q&A & Wrap-Up

Key Messages

- Google partnership will drive innovation to accelerate digitalization and the transition to cloud-based services across the industry
- Acquisition of Rhebo, a leading provider of cybersecurity solutions to protect critical infrastructure, will strengthen Landis+Gyr's position in this growing market
- Several US utilities have obtained regulatory approval, confirming the recognized benefits of Smart Metering and Grid Edge Intelligence technology
- Mid-term FY 2023 financial targets are initiated; the dividend policy is revised
- FY 2020 guidance ranges remain unchanged; a legacy non-cash goodwill impairment will be recognized in H2 FY 2020
- Balance sheet strength enables continued investments in R&D and acquisitions to transform the business and position it for longer-term growth
- Global megatrends of sustainability, digitalization and increasing energy demand reinforce the need for Grid Edge Intelligence and Smart Infrastructure
- Landis+Gyr is proud to have signed up to the UN Global Compact and is committed to contributing towards the UN Sustainable Development Goals

Transforming the business for longer-term growth while providing attractive returns to shareholders

embracing change for a greener tomorrow

Sustainability is part of our DNA

Passionately contributing to the 17 UN Sustainable Development Goals



Achievements in FY 2019

Climate ...



- ... 8 million tons of CO₂ saved through use of Landis+Gyr products in 2019
- ... 9% reduction in Landis+Gyr's own CO₂ emissions

Resources ...



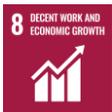
- ... 11% reduction in water usage
- ... 6% reduction in waste
- ... 12% reduction in chemicals

Trust ...



- ... Signed up to the UN Global Compact
- ... Code of Business Ethics & Conduct enhanced to include topics such as fair labor standards and responsibility to the environment

Equality ...



- ... All Landis+Gyr employees were asked to acknowledge receipt of and compliance with the enhanced Code of Business Ethics & Conduct
- ... Over 3,500 employees completed an annual training compliance training regarding the Code of Business Ethics & Conduct

Sustainability Engagement for the Future

Climate ...



- ... Increase tons of CO₂ saved by use of L+G products & services
- ... Adopt green design principles across more of the portfolio
- ... Reduce the CO₂ footprint of our operations

Resources ...



- ... Develop a smart water portfolio
- ... Reduce resource impact of L+G products
- ... Reduce water usage

Trust ...



- ... Improve supplier compliance with L+G standards
- ... Improve internal compliance metrics

Equality ...



- ... Improve access to energy by supporting electrification projects
- ... Improve gender diversity across L+G
- ... Increase training & apprenticeships across L+G

fostering a culture of excellence



125 Years of Excellence



Global Reach & Local Presence
Swiss HQ with Locations
in over 30 countries
worldwide



Frost & Sullivan
**Global AMI Company
of the Year 2019** –
for 5th consecutive year



Worldwide largest
IoT Utility Network
1.3 billion reads per day
with 99.99 % accuracy



Smart Infrastructure
Partnership with
Google



Largest installed base
300+ million
devices globally



Over 125 million
Connected intelligent
devices deployed



More than **15 million**
meter points under
managed services



of services to
3,500+ customers
as a trusted partner

Over 8 million tons of CO₂ saved by Landis+Gyr devices each year



Global Leadership Team



Werner Lieberherr*
Chief Executive Officer



Susanne Seitz*
EMEA



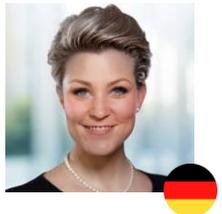
Prasanna Venkatesan*
Americas



Steve Jeston
Asia Pacific



Elodie Cingari*
Chief Financial Officer



Eva Borowski
IR & Corporate Communications



Sean Cromie
SCM & Operations



Jeff Seabloom
Technology



Bodo Zeug
Strategy



Holger Klafs
General Counsel



Hans Sonder
Information Technology



Kevin Smith
HR

Global leadership team highly committed to deliver strategic & operational results

Our Mission



At Landis+Gyr, we create a greener tomorrow through leading smart metering, grid edge intelligence and smart infrastructure technology.

As partners, we empower customers and consumers to utilize resources in a more informed and sustainable way.

Together, we **manage energy better.**



Our Values

CUSTOMER INTIMACY

We are a **trusted partner** and deliver on our commitments

UNCOMPROMISING PERFORMANCE

We strive to deliver **high quality** on time, every time

INNOVATIVE TECHNOLOGY

We passionately innovate **true differentiators** for our customers

ENTREPRENEURIAL SPIRIT

We empower teams to **drive results** with a can-do attitude

SUSTAINABLE IMPACT

We **manage energy better** for a more sustainable world

Progress since April 2020 (I)

Business Resilience despite COVID-19

- Despite almost 30% revenue decline in H1 FY 2020, produced a solid Free Cash Flow (excl. M&A) of USD 45.3 million and traded profitably with an 8% Adjusted EBITDA margin
- Temporary delays in rollouts and regulatory project approvals, however no major project cancellations
- No major impact on supply chain and manufacturing, currently all factories operational
- Currently on target to achieve FY 2020 guidance

Realignment of Organization to ensure Customer Focus & Operational Excellence

- Renewed global leadership team to deliver strategic and operational results
- Established culture of empowerment and accountability driving uncompromising performance, transparency and predictability

Proactively Manage Cost

- Restructuring and streamlining initiative resulting in 12% workforce reduction
- Product cost out initiatives and inventory reductions to strengthen competitive position

Progress since April 2020 (II)

Regulatory Approvals in the US

- Regulatory approvals granted to several utilities in the US, confirming the recognized benefits of Smart Metering and Grid Edge Intelligence technology

Strategy Review & Validation

- Refined and expanded strategic priorities in Smart Metering, Grid Edge Intelligence and Smart Infrastructure
- Market expansion and product line extensions into smart water, smart gas
- Increased focus on M&A and partnerships

R&D

- Redesigned R&D organization with regional empowerment and global strategic responsibility
- Increasing focus on Grid Edge Intelligence and Smart Infrastructure

Expand Software & Services Offering

- Signed multi-year strategic partnership with Google to elevate customer experience and strengthen position in Grid Edge Intelligence and Smart Infrastructure

M&A

- Signed Rhebo acquisition, adding cybersecurity network monitoring capabilities down to critical endpoints at the grid edge

creating the future on a solid foundation

Key Investment Highlights

Foundation for the mid-term

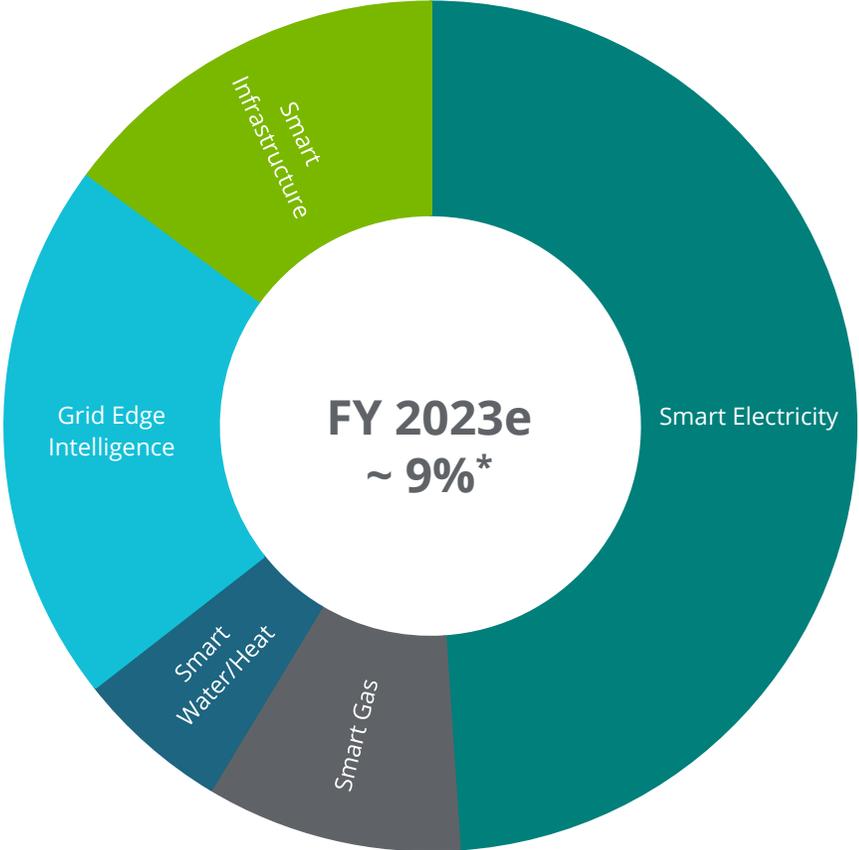
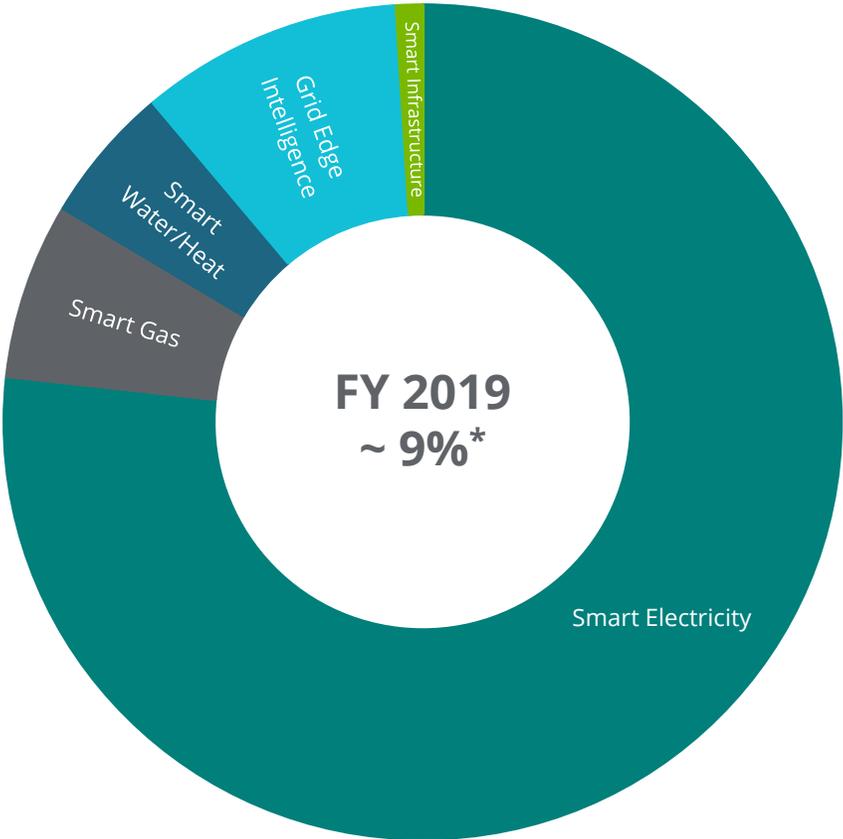
- Leading installed base and strong relationships with customers around the globe
- Solid balance sheet with significant investment capacity for sizeable acquisitions
- Strong cash generative business with asset light business model and dividend capacity
- Further investing in industry leading technologies with sharper focus on execution
- Passionate commitment as an ESG-centric industry leader, driving sustainable impact by empowering utilities and communities to manage energy better

Enablement for the long-term

- Infrastructure play benefitting from megatrends to renewables and a more complex grid
- Benefitting from 2nd wave deployment cycles incorporating Grid Edge Intelligence
- Leverage strategic partnerships to accelerate digitalization differentiation
- Pursue higher growth technology adjacencies, both organically and inorganically
- Data driven solutions to enable sustainable and empowered utilization of energy and water

Transforming the business for longer-term growth while providing attractive returns to shareholders

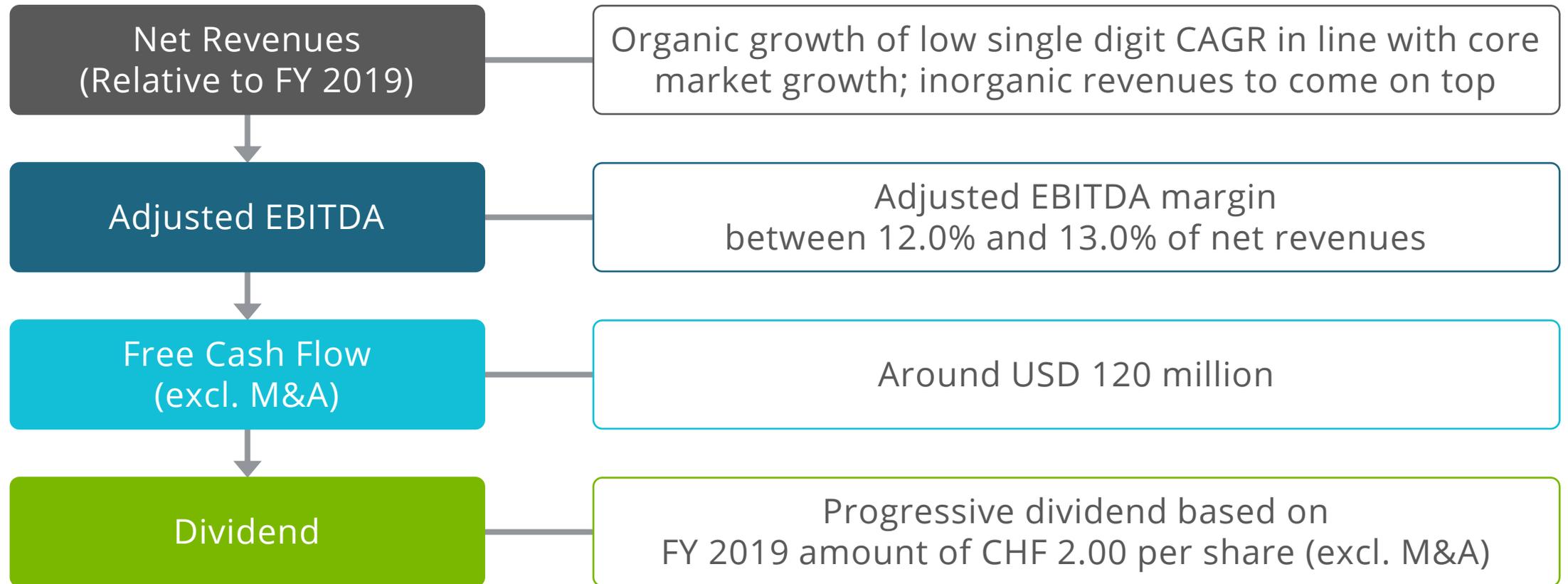
Technology Roadmap



* R&D expense as % of revenue

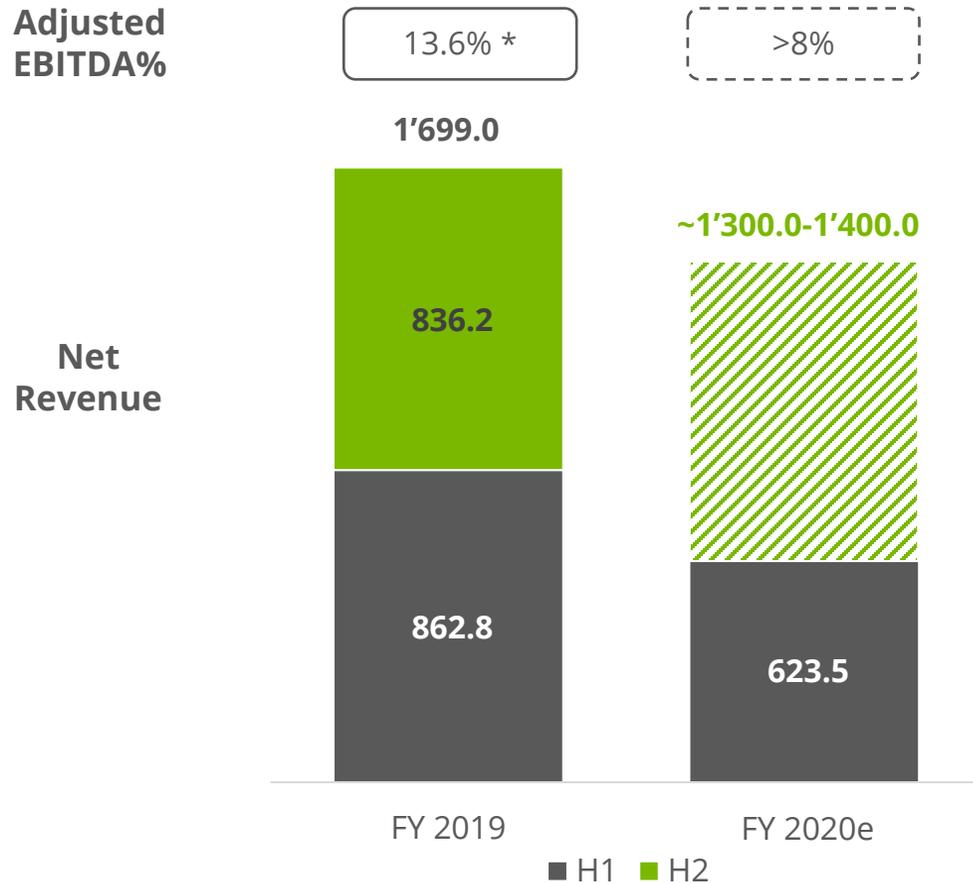
Technology investment shift towards Grid Edge Intelligence and Smart Infrastructure

Mid-Term Guidance (FY 2023) & Dividend Policy



Financial Performance

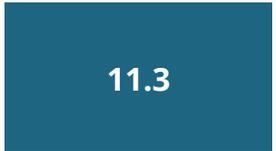
USD in millions



* excluding one-off Brazil VAT benefit of USD 5.6m in FY 2019

- H1 FY 2020
 - Deployments and new volume in core countries delayed due to COVID-19; no major order cancellations to date
 - AMERICAS - Slow down of various project installations and further delay of regulatory project approvals
 - EMEA - Lockdowns particularly in the UK, France and the Netherlands delayed some deployments
 - APAC - Hong Kong roll-out acceleration
- H2 FY 2020
 - H2 FY 2020 performance expected to improve compared to H1 FY 2020
- FY 2020 Guidance remains unchanged

Operational Financial Management

	KPI (USD in millions)	% Revenues	Comments
Adjusted OPEX	 <p>144.4</p> <p>H1 FY 2020</p>	23.2%	<ul style="list-style-type: none"> H1 FY 2020 OPEX benefited from strict control measures, one-off effects of COVID-19 government support schemes, and reduced travel expenses Restructuring Initiative – Structural reduction with savings of USD 5m in FY 2020 and annual run rate savings of USD 16m on OPEX
Capex	 <p>11.3</p> <p>H1 FY 2020</p>	1.8%	<ul style="list-style-type: none"> Strict CAPEX controls; low investment needs due to asset light model
Operating Working Capital	 <p>280.1</p> <p>September 30th FY 2020</p>	22%*	<ul style="list-style-type: none"> OWC decreases on lower volumes; focus on inventory reduction going forward

* based on annualized last 6-month net revenues

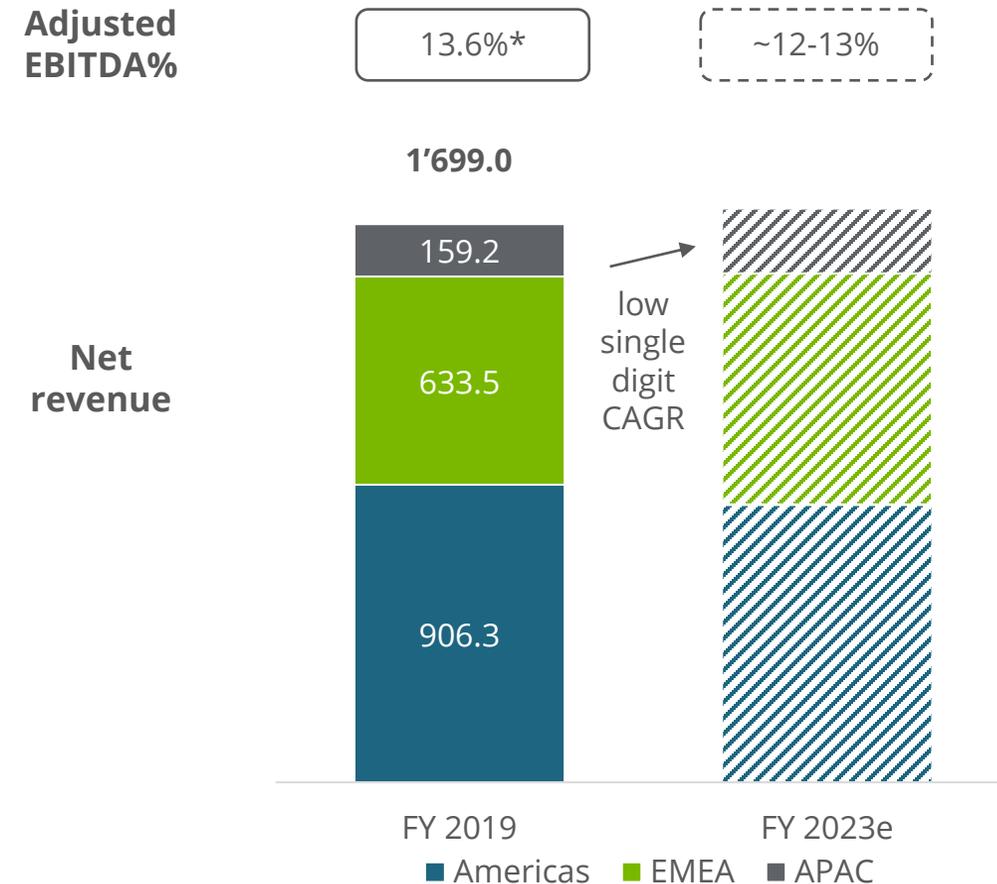
Cash Generation & Balance Sheet

	KPI (USD in millions)	% Revenues	Comments
FCF (excl. M&A)	 <p>45.3</p> <p>H1 FY 2020</p>	7.3%	<ul style="list-style-type: none"> Continued strength in Cash Flow generation, despite business environment
Net cash	 <p>12.1</p> <p>September 30th FY 2020</p>	0.1x*	<ul style="list-style-type: none"> Solid Balance Sheet with net cash position; USD 369m cash plus CHF 200m undrawn credit facilities Non-cash impairment of ~ USD 400m for the Americas related to legacy Toshiba goodwill to be recognized in H2 FY 2020

*based on last 12-month trailing Adj. EBITDA

Mid-Term Projections

USD in millions



- AMERICAS – Regulatory approval delays and US project roll-offs impacting revenue, margins under pressure due to lack of operational leverage and mix during this transition cycle;

Recent regulatory developments positive, renewal of order backlog expected to drive longer term revenue growth and associated margin recovery

- EMEA – Growth driven by 2nd wave in Nordics, Switzerland and other European countries
- APAC – Revenue and margin expansion driven by growth in key markets ANZ, SEA (outside Hong Kong) and India

* excluding one-off Brazil VAT benefit of USD 5.6m in FY 2019

Capital Allocation



Organic Growth

Technology leadership through R&D and partnerships to fuel growth e.g. Revelo®, E360™, Water and Gas segment, Software and Cloud readiness

Inorganic Growth

Significant investment capacity for sizeable acquisitions to expand capabilities and growth profile

Shareholder Returns

Attractive cash return subject to market conditions; share buyback program currently remains suspended

Target

~ 9% of revenue

Portfolio & market expansion

Progressive dividend based on FY 2019 amount of CHF 2.00 per share (excl. M&A)

Transforming the business for longer-term growth while providing attractive returns to shareholders

driving future growth with leading-edge innovation

Global Megatrends

1. Growing Population



- Conscious Resource Management
- Clean & Accessible Water
- Reliable Energy Supply
- Improved Air Quality

2. Rapid Urbanization



- Smart Cities
- Increased Need for Smart Infrastructure
- Increased Need for Smart Resource Management
- Changed Energy Distribution Demand

3. Decarbonization



- Monitor Energy Consumption
- Reduce Energy Consumption
- Capture Energy
- Store Energy
- Reuse Energy

4. Accelerated Digitalization & New Technologies



- eCommerce
- Smart Applications
- Grid Edge Intelligence
- Cyber Security

5. Empowered Consumers



- eCommerce
- Digitalization
- Smart Applications
- Prosumers

6. Increased Focus on Sustainability



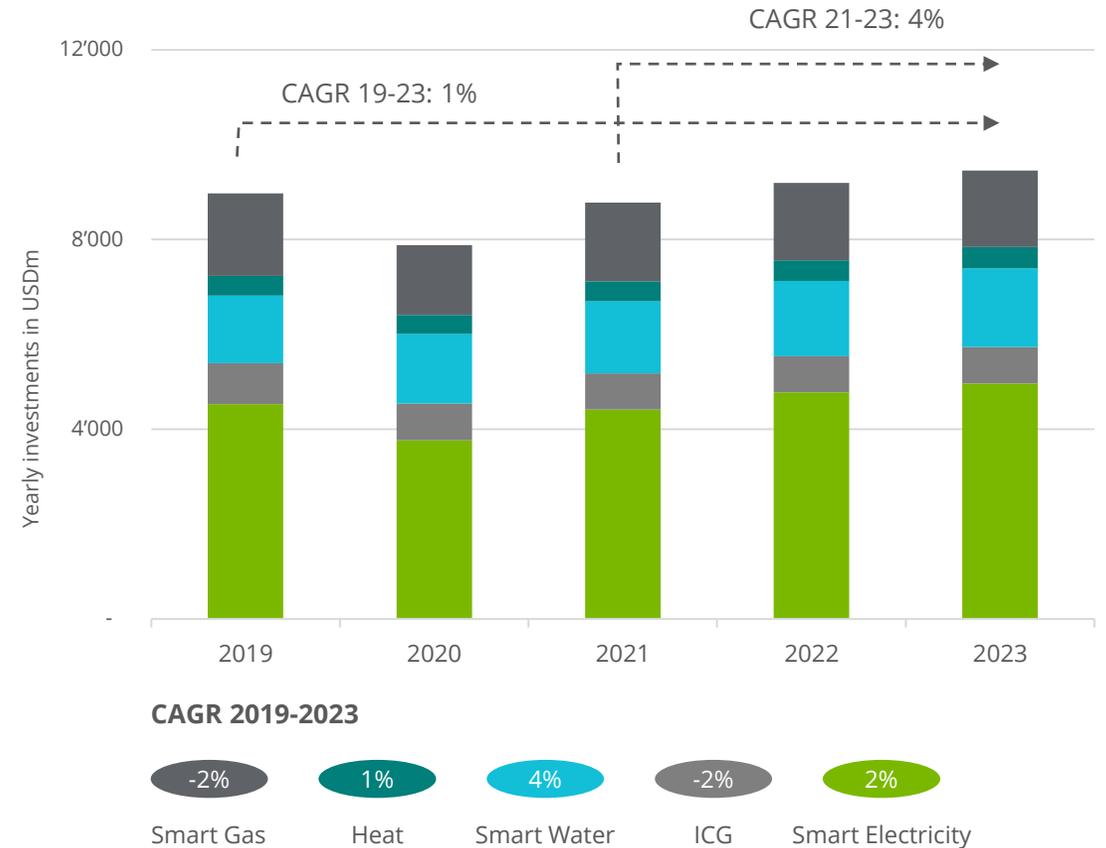
- UN Sustainable Development Goals
- OECD Green Recovery
- EU Green Deal and Regulations
- Biden Plan for a Clean Energy Revolution and Environmental Justice

Demands of growing population and scarce energy resources drive need for L+G portfolio offerings

Global Market Outlook

SMART METERING

- Global smart meter markets grow with 1% CAGR
- Ongoing electricity and gas roll outs in EMEA and NAM
- Growth potential esp. in APAC and SAM
- Smart water growth driven by increased focus on resource management



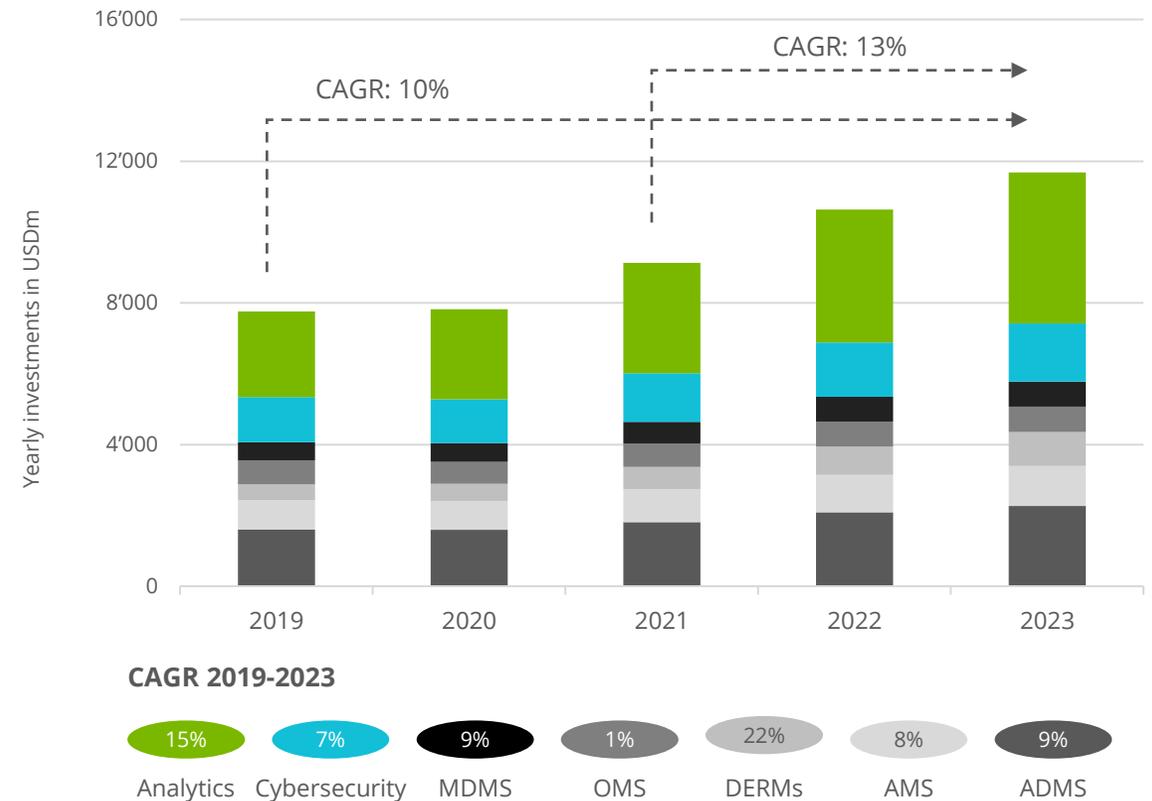
Sources: Frost & Sullivan (2020), Omdia (2019), excluding China

Leverage technology expertise to expand reach in smart water and smart gas markets

Global Market Outlook

GRID EDGE INTELLIGENCE & SMART INFRASTRUCTURE

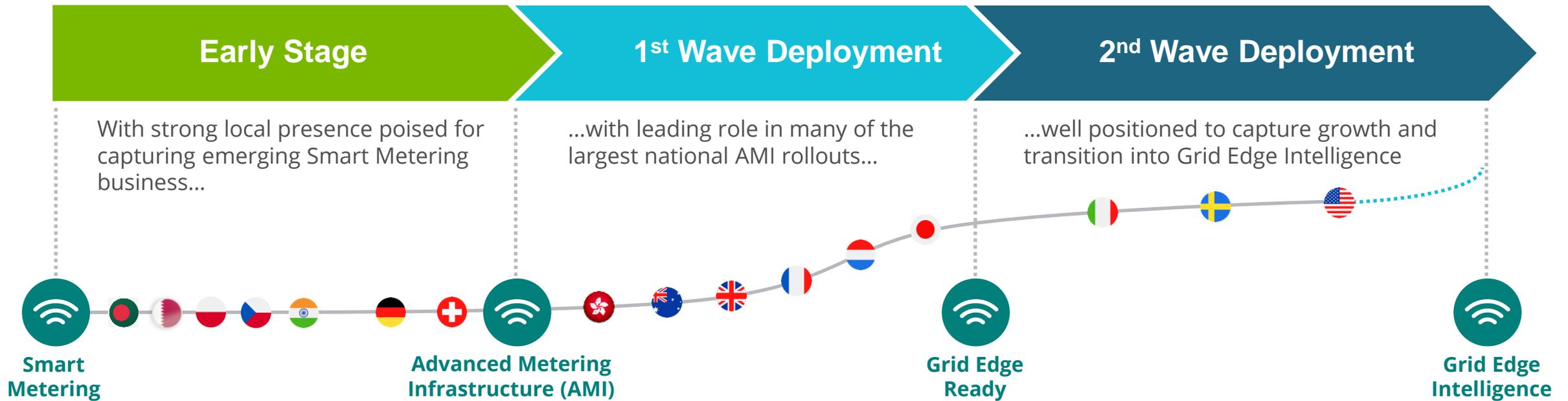
- Rapid growth of distributed energy resources
- Automation, communications networks, monitoring devices and digitization proliferate in the grid
- Sensors, meters, etc. provide utility operators with grid data
- Increased demand for software and solutions enabling Grid Edge Intelligence and Smart Infrastructure, such as cybersecurity, analytics, to improve reliability, efficiency and customer interaction



Source: Guidehouse Insights, Energy IT and Cybersecurity Overview (4Q 2019).
Note: 2020 and 2021 data adjusted for COVID-19

Leverage Google AI and ML capabilities and targeted M&A for Analytics and Cybersecurity

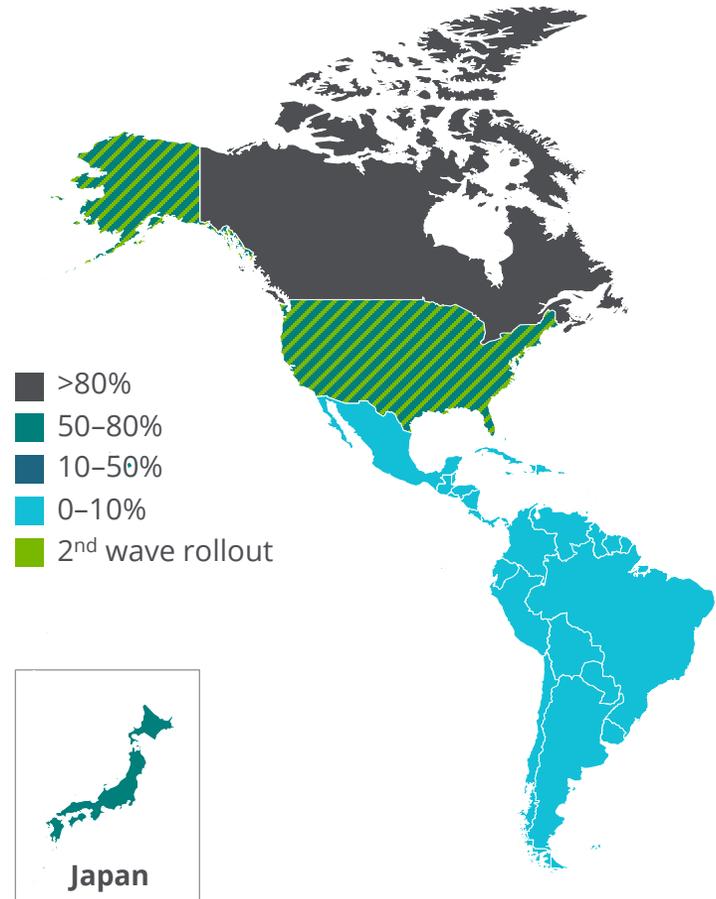
Technology Deployment - Global Pipeline



Leverage Smart Metering expertise to drive Grid Edge Intelligence & Smart Infrastructure

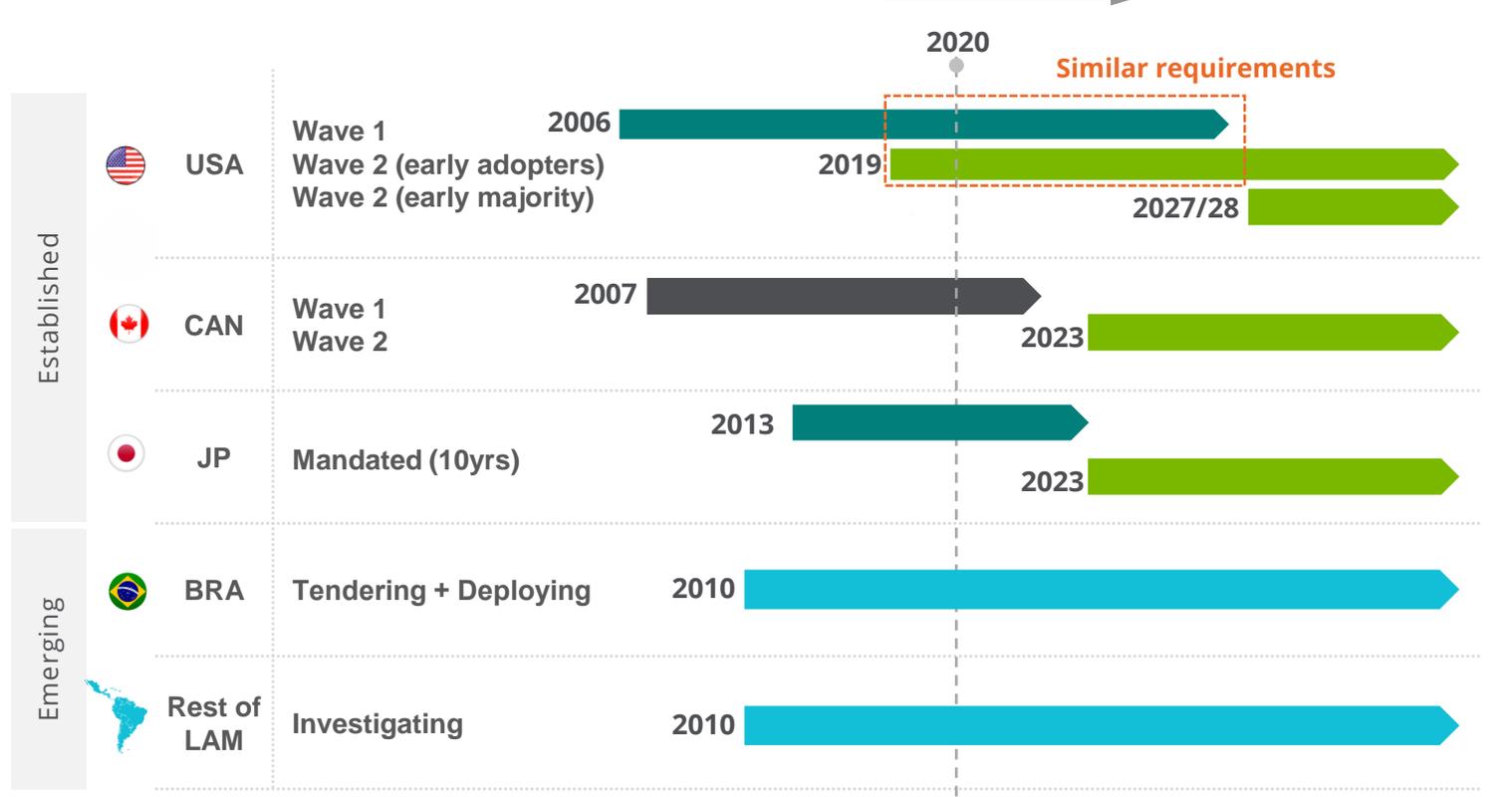
Technology Deployment - Americas

Electricity Smart Meter Penetration (end of year 2019)



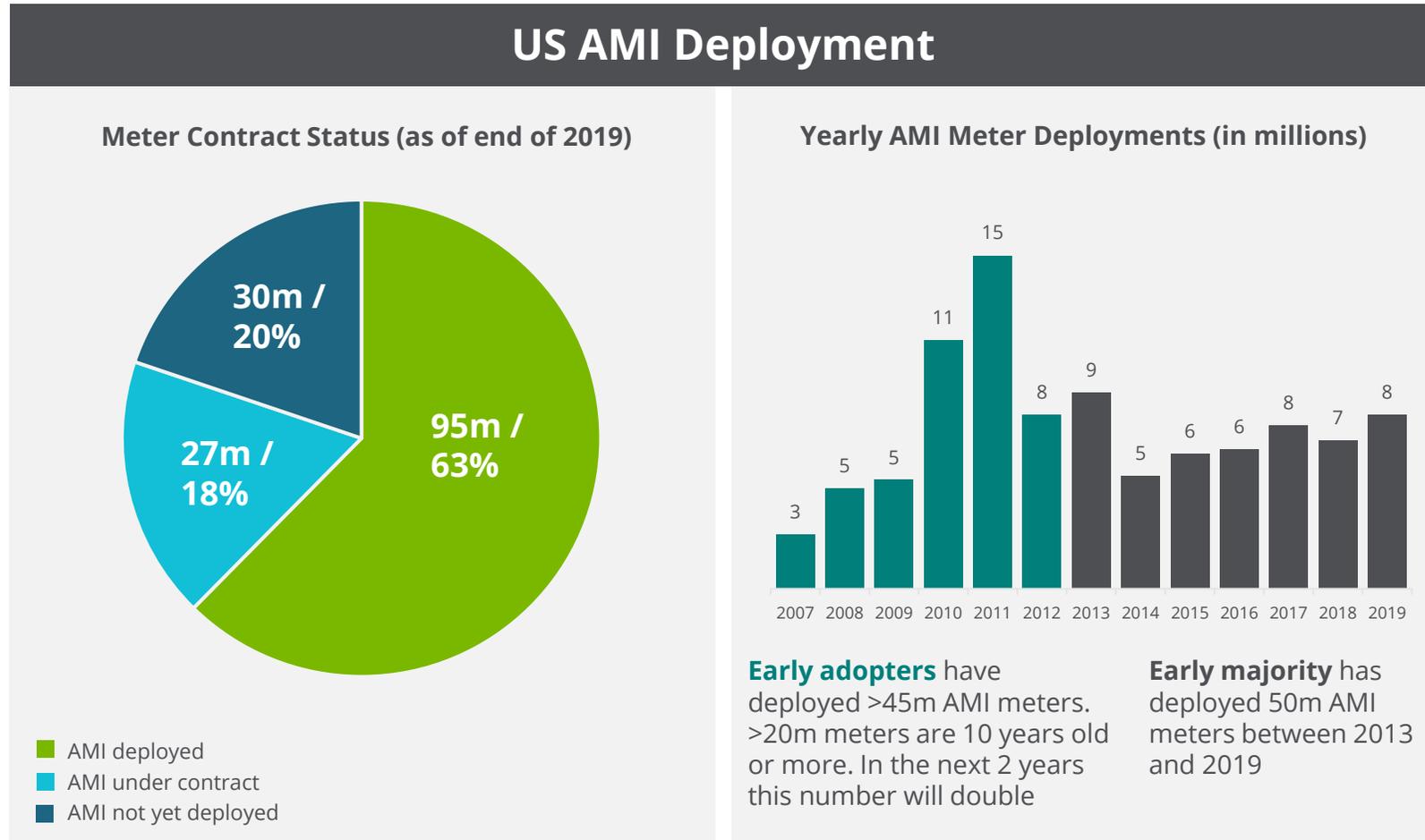
2019
AMI installed base: 175m
AMI penetration: 40%

2023
AMI installed base: 235m
AMI penetration: 50%



Sources: Frost & Sullivan (2020), Northeast (2020), Wood Mackenzie (2020), Landis+Gyr Intelligence

Early Adopters become Refresh Opportunities



- Resilient North American AMI market
- 2nd wave rollout is driven by age of installed endpoints and the technology available at that time
- Early adopters starting 2nd wave rollouts, including grid edge functionality and smart infrastructure
- Later adopters will deploy AMI meters with similar technology as 2nd wave rollouts of early adopters

Source: EIA, Landis+Gyr Intelligence

Revelo® - The Industry Game Changer

Revelo® Unique Capabilities

Streaming Waveform Data

Only residential meter in the market to stream high resolution waveform data

Powerful Processing for Edge Apps

Advanced computing power at the grid-edge with embedded waveform data processing algorithms

Secure WiFi Increases Connectivity

Internet connected residential meter with Wi-Fi Alliance certified Home Area Network capability with robust security

Market-Leading Design for Safety

Motor-driven 320A disconnect switch and advanced heat rise, hot socket, and arc sensing analytics



Unique Value Proposition

Increase Reliability with Lower OpEx

Enable advanced power quality and fault detection/identification capabilities that reduce SAIDI, SAIFI, MAIFI and related OpEx

Real-time Grid Operations

Create real-time insights to improve grid operations and customer experience with low network bandwidth utilization

Consumer Connectivity

IoT automation reduces consumer cost and improves effectiveness of utility programs, e.g. time-of-use

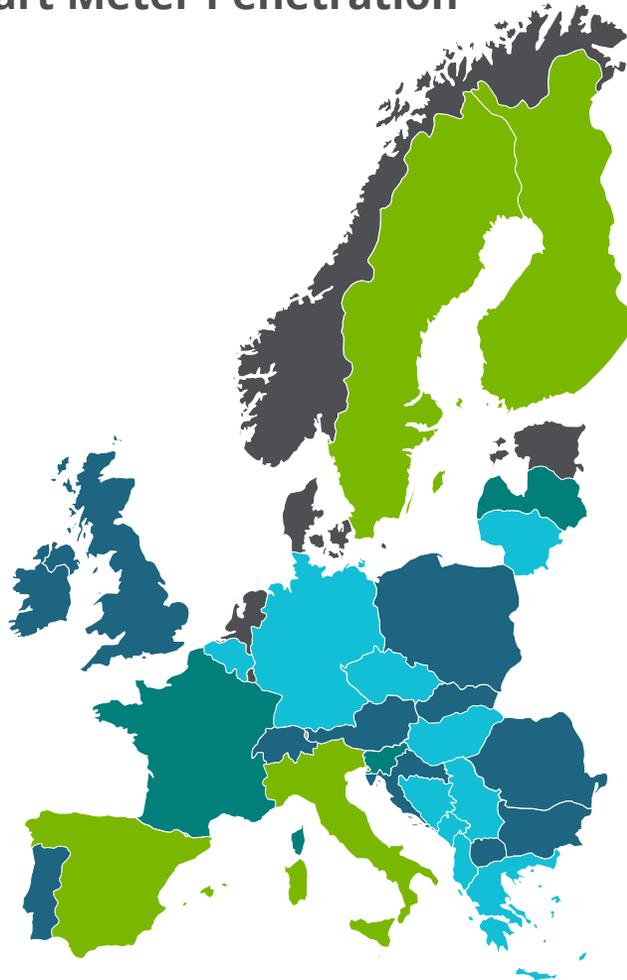
Increased Consumer Safety

Provides the industry-leading safety profile for residential meters

Technology Deployment – EMEA

Electricity Smart Meter Penetration (end of year 2020)

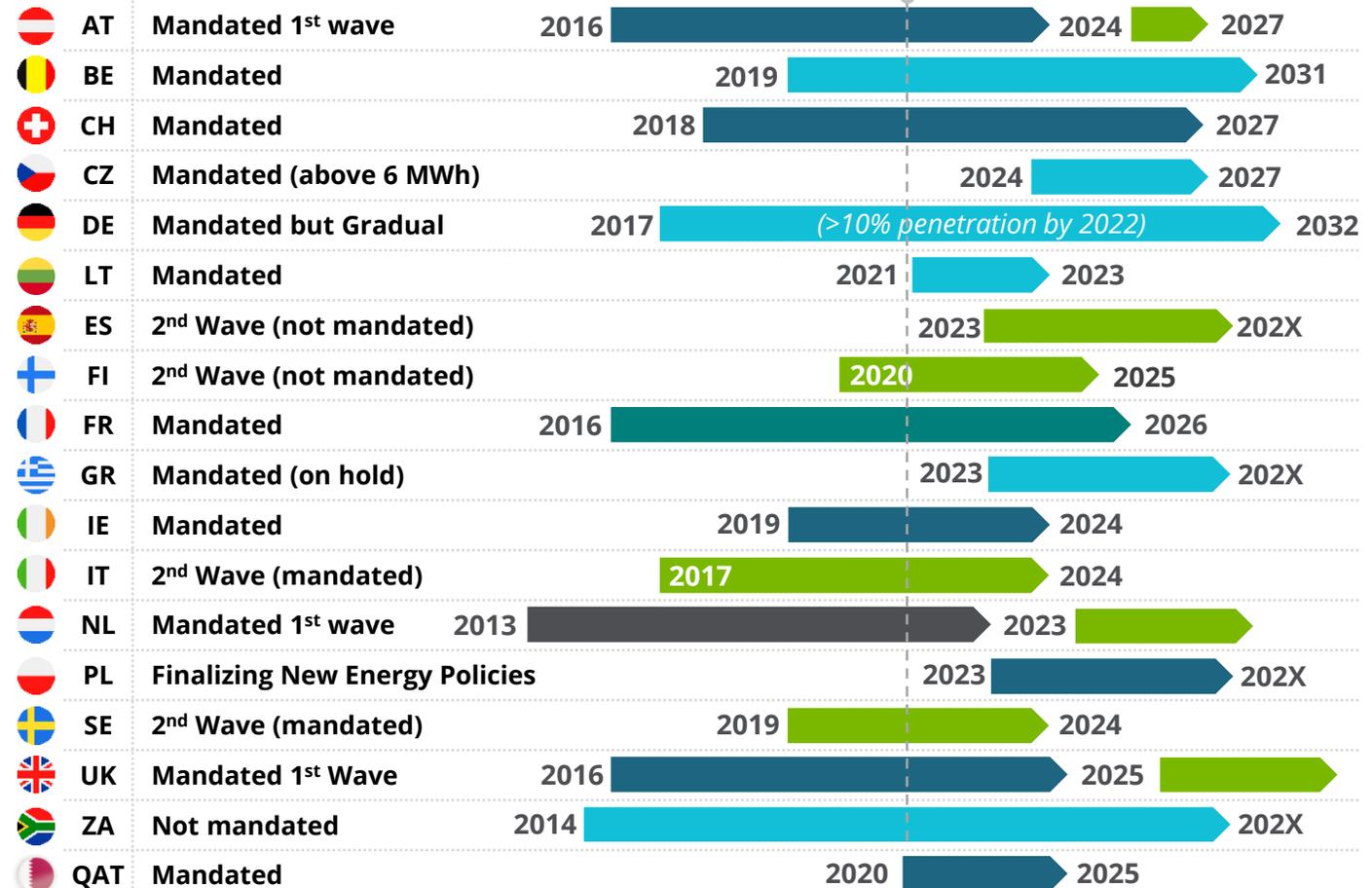
- >80%
- 50–80%
- 10–50%
- 0–10%
- 2nd wave rollout



2019
Installed base: 135m
Penetration: 45%

59m (new AMI)
+27m (2nd wave) meters to be installed

2023
Installed base: 194m
Penetration: 63%



Sources: Berg Insight (2020), Landis+Gyr Intelligence. Installed base limited to Europe only.

Portfolio Transition driving Growth

Landis+Gyr Portfolio



Meter Data Management
Software platform and
applications



Extended communication
portfolio



Intelligent IoT endpoints
Electricity, Gas and Heat

Launches in 2020



New applications
(e.g. Operational Data Panel)
Transition to SaaS offering



IoT Connectivity-as-a-Service



E360™



E660™

Future Evolution



Data-driven service
offerings
Head-end-system in cloud,
PQ applications



Extend communication
portfolio leveraging 5G
technology



Introduce Smart Water
meters

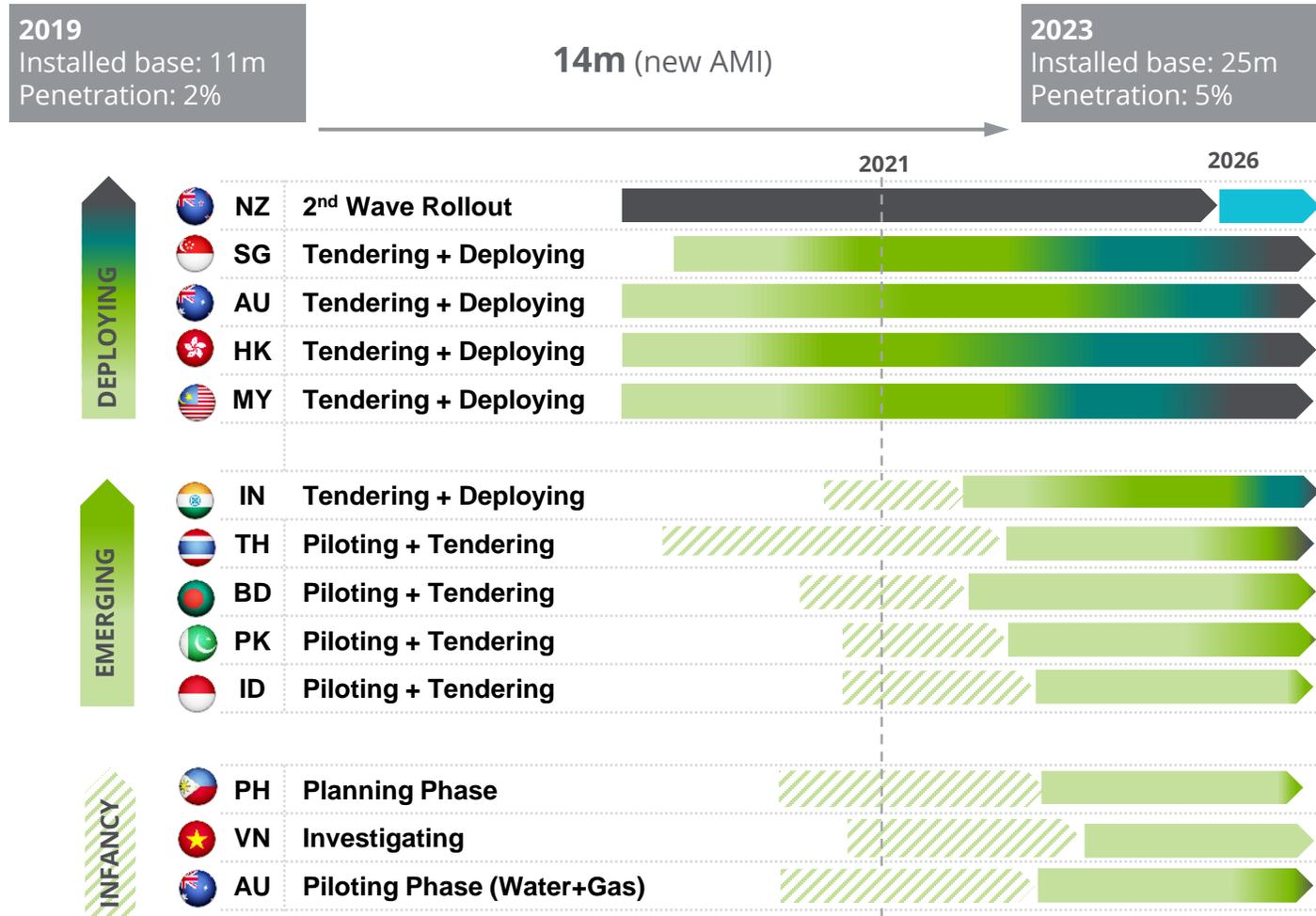
Technology Deployment – APAC

Electricity Smart Meter Penetration

(end of year 2020)



Stage of Smart Metering deployment



Sources: Landis+Gyr Intelligence, Frost & Sullivan (2020)

Leveraging Global Portfolio Investments

Leveraging



Software platform and service offerings



HES, MDMS, Grid Analytics, SaaS, Cloud

Global communication portfolio

Different communication modules to meet specific market needs incl. RF, cellular, PLC communication. IoT Connectivity-as-a-Service



E360™
Smart Residential



E660™
Smart Industrial

Next generation metering

Intelligent smart electricity meters as well as heat, gas providing near real-time insights to improve grid operations

Building

Full AMI Solutions

- Hong Kong: solutions delivery of smart meters, communications infrastructure, HES, MDM and analytics
- Australia/India: SaaS offerings for smart metering
- Expanded analytic offering via cloud services

NB-IoT Smart Grid networks

- Australia: Next Gen LTE Cat m/NB IoT for Smart Electricity
- NB IoT for Smart Gas and Water segments
- South East Asia NB IoT trails Singapore and Thailand

Next Gen Metering / Grid Edge

- Grid Edge capabilities to include higher processing and data streaming enabling advanced applications such as DERMS

Creating customer value by tailoring global expertise and technologies to local requirements

unlocking value with a clear strategic vision



Strategic Value Drivers

+ GLOBAL MEGATRENDS

Growing Population,
Urbanization, Decarbonization,
Digitalization, Empowered
Consumers & Sustainability

+ FINANCIAL STRENGTH

Solid Balance Sheet |
Investment Capacity

+ TECHNOLOGY & INNOVATION

R&D | M&A | Partnerships

+ VISION, VALUES & PEOPLE

manage energy better |
Culture of Excellence

+ SMART METERING

+ GRID EDGE INTELLIGENCE

+ SMART INFRASTRUCTURE

Technology investments, supported by global megatrends, a strong strategic vision, passionate people and a solid balance sheet, drive business transformation for longer-term growth and sustainable impact

Strategic Priorities

+ SMART METERING

- Leverage E360™ and E660™ Smart Meters enabling Grid Edge Intelligence use cases
- Unify Head End System in the Cloud
- Expand reach in Software & Services Portfolio
- Global Expansion in Smart Gas Metering
- Market Entry in Smart Water Metering
- Drive Growth in current & new Markets
- Opportunistic M&A - Entry into new markets or portfolio enhancements

Strategic Priorities

+ GRID EDGE INTELLIGENCE

- Leverage Revelo® Grid Edge Intelligence sensor to enable Smart Infrastructure use cases
- Drive Advanced Load Management, Grid Analytics & Distribution Automation Solutions
- Empower Energy Consumers through Home Analytics, Real-time High Energy Usage & Safety Alerts
- Increase Software & Services Portfolio through strategic Partnership with Google
- Rhebo Acquisition increases Cybersecurity Network Monitoring Capabilities down to critical Endpoints at the Grid Edge
- Synergistic M&A - New technology for current verticals

Targeted acquisition to enhance our portfolio in cybersecurity

«With Rhebo, we can be sure that any anomaly in our network control system will be reported to us in real-time enabling us to react immediately.»

MITNETZ STROM

Largest distribution network operator in East Germany maintains an electricity network for a secure energy supply for 2.3m people

Opportunity

- Increased demand for cyber security at the grid edge due to additional threats accelerated by complexity of electric vehicles, distributed energy generation and storage

Rhebo Solution

- Proven technology in OT network condition monitoring and anomaly & threat detection
- Positive customer traction with utilities and industrial sector

Strategic Value

- Addition to our Grid Edge Intelligence portfolio
- Participate in double digit growth for network condition and cybersecurity monitoring
- Achieve scalability with Google technology and our existing customer base

Strategic Priorities

+ SMART INFRASTRUCTURE

- Leverage Partnership with Google to transform Landis+Gyr to become the leading partner for integrated energy management solutions and Smart Infrastructure by utilizing Cloud based Technologies
- Increase Cybersecurity Capabilities through Rhebo Acquisition
- Potential expansion of EV pilots in markets where the EV framework is aligned with smart metering infrastructure
- Increased focus on street lighting as part of smart infrastructure
- Expand into non-regulated markets and enable smart cities
- Targeted M&A - Move into adjacent markets, focused on smart cities and sustainability themes



Google Cloud Partnership

+ CUSTOMER BENEFITS

Enable utilities to manage grid operations with more visibility and empower energy consumers to manage energy better

- Higher Availability
- Data Analytics
- Outage Predictability
- Connected Devices - Revelo® + Cloud
- Connected Consumers
- Improves Data Management in Real Time
- Protecting Current Investments
- Data Ownership
- Choices (public or private)
- AI/ML = Predictable Outcomes

+ EFFICIENCIES

Landis+Gyr's transformation into the cloud will drive agility, ensure cyber-security, and reduce cost over time

- Open Standard Architecture
- Speed
- Security
- Higher Productivity
- Investment Protection
- User Experience
- Simplified Updates
- Native Cloud Services
- Multi-Cloud Strategy

+ INNOVATION

We will co-innovate the next generation of cloud-based energy management solutions to enable smart infrastructure and smart cities

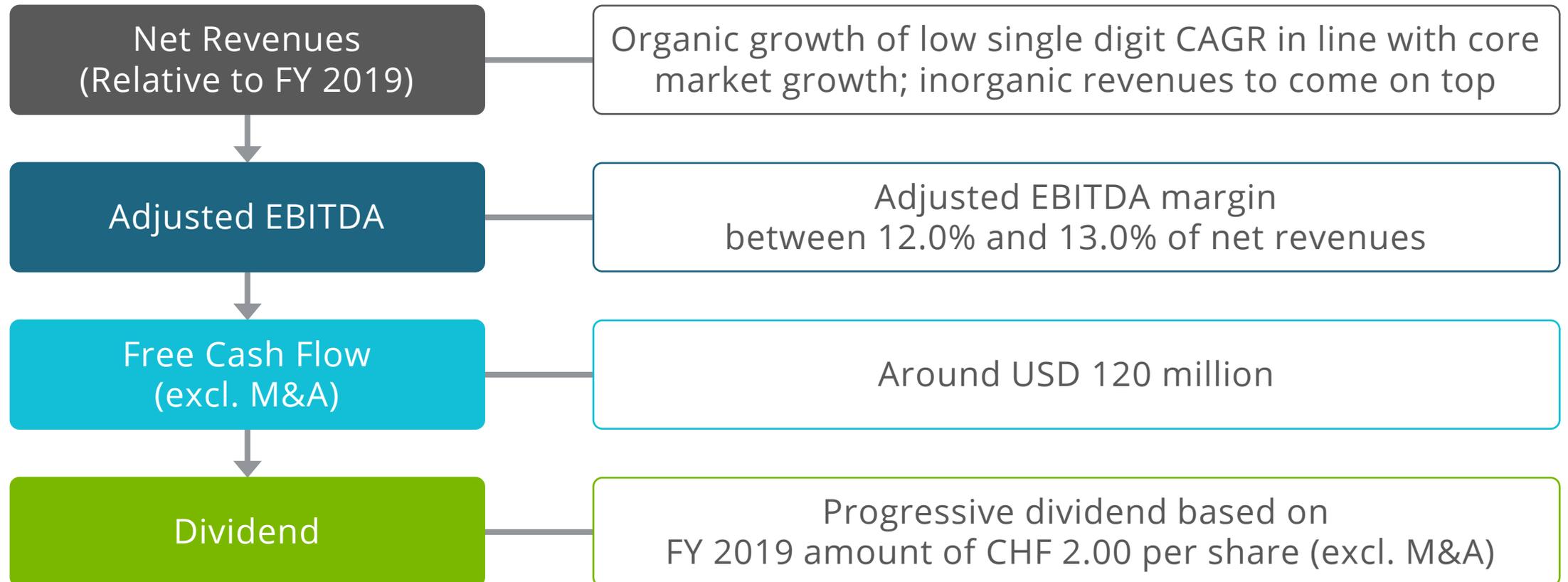
- New Revenue Streams
- New Markets
- User Experience
- M&A Acceleration
- Groundbreaking Applications
- "Coopetition"

The long-term innovation partnership between Landis+Gyr and Google Cloud aims to leverage Smart Metering and Grid Edge Intelligence, data analytics, AI and ML to transform the future of the energy industry

questions & answers



Mid-Term Guidance (FY 2023) & Dividend Policy



Key Messages

- National Grid and British Gas validated increasing need for Smart Metering, Grid Edge Intelligence and Smart Infrastructure
- Several utilities obtained regulatory approvals in the US, confirming the recognized benefits of Smart Metering and Grid Edge Intelligence technology
- Resilient cash-generative business model as demonstrated in challenging COVID-19 environment
- Continued investments in R&D, particularly in Grid Edge Intelligence and Smart Infrastructure to drive longer-term growth
- Transformational Cloud and Innovation Partnership with Google to accelerate digitalization differentiation
- Significant investment capacity for acquisitions, starting with Rhebo elevating cybersecurity offerings
- Establishing a high-performance culture with a strong focus on customer intimacy and operational excellence
- Passionate commitment as an ESG-centric industry leader, driving sustainable impact by empowering utilities and communities to manage energy better

Transforming the business for longer-term growth while providing attractive returns to shareholders

Glossary

ADMS	Advanced distribution management system	ML	Machine learning
AI	Artificial intelligence	NB-IoT	Narrowband IoT
AMI	Advanced metering infrastructure	OMS	Outage management system
AMS	Asset management system	OT	Operational technology
CAGR	Compound annual growth rate	OWC	Operating working capital
CMD	Capital markets day	PLC	Powerline communication
CO₂	Carbon dioxide	PQ	Power quality
DERM	Distributed energy resources management system	RF	Radiofrequency
EIA	Energy Information Administration (US)	SaaS	Software as a service
ESG	Environmental, Social and Governance	SAIDI	System average interruption duration index
EV	Electric vehicles	SAIFI	System average interruption frequency index
HES	Headend system	SMETS	Smart metering equipment technical specifications
ICG	Industrial, commercial and grid	U/X	User experience
IoT	Internet of things	UN	United Nations
KPI	Key performance indicator	WiFi	Wireless Fidelity
MAIFI	Momentary average interruption frequency index		
MDMS	Meter data management system		

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Contacts & Dates



Important Dates

Release of FY 2020 Results:

May 5th, 2021

Publication of Annual Report 2020 and Invitation to AGM 2021:

May 28th, 2021

Annual General Meeting 2021:

June 24th, 2021



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