2ND QUARTER AND 1ST HALF-YEAR 2013

Bechtle AG
Neckarsulm, 14 August 2013
AGENDA.

- Economic Conditions
- Corporate Development
- Bechtle Share
- News and Updates
- Forecast for 2013
Macroeconomy.

- Economic development throughout the EU continues at sluggish pace. GDP growth in Bechtle countries fluctuating between − 0.2% and + 0.5%.
- Modest economic growth in Germany; growth still remains low at + 0.3%.

Sector.

- After a positive start to the year, the overall mood in the IT industry has since soured.
- Sales volume for certain product groups (PCs, servers) has decreased by double-digit percentages.
- The analysis of the current situation and prognosis for the coming months are pessimistic.
- Nevertheless, the relevant indices remain comparably high.

Conclusion.

- Bechtle is demonstrating positive development despite difficult general economic conditions. Growth is above average, especially in the home market (Germany).
- German customers still hesitant about larger service projects.
Balanced growth in first half-year of 2013.
German system houses drive growth (+ 8.9%).
System house segment shows significant revenue growth.
GROSS MARGIN.
Development since Q1.2010

Gross margin remains high and stable.
EBITDA DEVELOPMENT.
By Segment: Q2.2013 vs. Q2.2012

EBITDA only slightly lower than in 2012.
EBIT DEVELOPMENT.
By Segment: Q2.2013 vs. Q2.2012

System house EBIT increases notably. E-commerce margin satisfactory.
EBIT DEVELOPMENT: Q2.2013 vs. Q1.2013

EBIT development in Q2 shows positive trend compared to Q1.
EMPLOYEE DEVELOPMENT.
Consolidated since Q1.2010

THE BECHTLE SHARE.
Performance

Market Figures (31.7.13)

Market capitalisation €776 m.

Performance:
- Bechtle + 19.4%
- DAX + 6.4%
- TecDAX + 18.3%
- DAXsubsector IT Services + 27.3%

Stock price exhibits positive development in reporting period.
Considerable Success in Public Sector Division

- Bechtle was awarded the largest European Commission tender to date for mobile end devices, as well as repeat contracts with the Bundeswehr and Dataport covering IT infrastructure and services.

Expansion of Managed Services.

- A total of 60 IBM employees joined Bechtle On-site Services in April and June.
- Cooperation with Freudenberg IT for outsourcing projects.

Acquisitions.

- Bechtle’s IBM infrastructure and virtualisation competence is reinforced by Sedna Informatik in Bern, Switzerland.

Important Partner to Vendors on a European Scale

- Bechtle once again awarded several “Best EMEA Partner” awards by manufacturers.
Development of IT Market in DACH Region in 2013:

- In total, the market is projected to grow + 2.6% to €90.3 bn (PY: + 3.6%).
- Of the three segments, hardware shows the weakest growth at 0.1%.
- At 4.9%, software is a growth catalyst.
- Growth expectations for 2013 already lowered at beginning of the year.
- Indices currently paint inconsistent picture.
FORECAST.
Financial Year 2013

Revenue.
- Growth in 2013 continuing at above-market-average rate, increasing our market share.
- Outstanding development continues in the public sector division—on the EU level as well.
- Further expansion of the solutions and service business.

Earnings.
- Earnings are rising; second quarter shows positive trend.
- Employees hired in 2012 ensure durable increase in efficiency.

Employees.
- More moderate growth compared to 2012, not including new employees through acquisitions.

Expansion.
- Acquisitions remain a part of our growth strategy.
- No new country markets in 2013.
ANY QUESTIONS?
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