Nasdaq: ECX

ECARX: Powering intelligence globally

Sidoti Virtual Small-Cap Conference
September 24, 2026

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ECARX is …

- A leading global **intelligence platform** company
- We provide the **"intelligent brain"** that powers the next generation of software-defined and AI-defined vehicles
- Global **operations,** global **management,** global **delivery,** global **supply chain**
- **28 brands**, across **18 automakers**
- Road tested: **>12 million** vehicles on the road today
- Deep technical expertise: **silicon** to **sensors** to **software**
- $848m **annual revenue**[1] and **EBITDA profitable** for four consecutive quarters[2]
- **Multiple growth drivers**: platform expansion, geographical expansion, customer expansion, structural product scope growth, robotaxis
- **NASDAQ listed**, ordinary shares

1. FY 2025
2. Q2 2026



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Q2 2026 Update

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Q2 26: Strong rebound with momentum accelerating into 2H 2026

US$225mn
Revenue

+45% YoY

US$50.7mn
Operating Expense

-11% YoY

US$44.5mn
Gross Profit

GM 19.8%
vs 10.8% in Q2 2025

US$0.5mn
Adj. EBITDA

Fourth consecutive EBITDA-profitable quarter

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Corporate Overview

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ECARX provides the intelligent brain for software-defined and AI-defined vehicles

ECU paradigm

100+ separate ECUs controlling each function	Embedded hardware + software cannot be updated	Each component linked to specific vehicle – long development cycle

Software and AI-defined vehicle paradigm

Layer	ECARX solution
AI	OpenAI, Gemini
Autonomous	Skyland™ Series ADAS Computing Platform, LiDAR
User Interface	Google, Flyme Auto
Middleware	Cloudpeak®
Silicon	siengine, NVIDIA, arm, Qualcomm

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Global management team



Ziyu Shen

Chief Executive Officer



Dylan Jeng

Chief Financial Officer



Peter Cirino

Chief Operating Officer

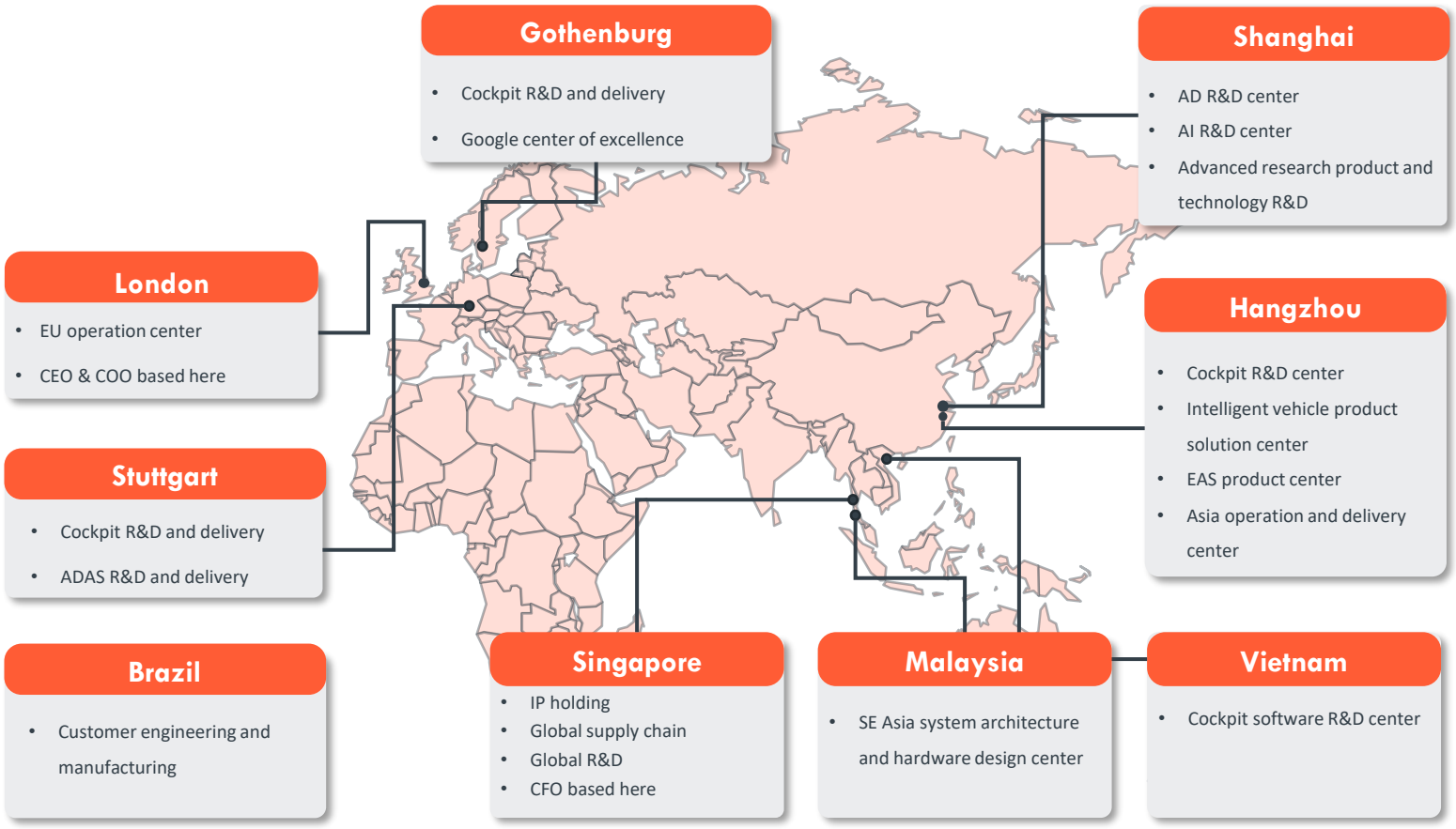


Lone Fønss Schrøder

Chairperson

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Global operations and supply chain support revenue growth outside of China



Gothenburg
- Cockpit R&D and delivery
- Google center of excellence

Shanghai
- AD R&D center
- AI R&D center
- Advanced research product and technology R&D

London
- EU operation center
- CEO & COO based here

Hangzhou
- Cockpit R&D center
- Intelligent vehicle product solution center
- EAS product center
- Asia operation and delivery center

Stuttgart
- Cockpit R&D and delivery
- ADAS R&D and delivery

Brazil
- Customer engineering and manufacturing

Singapore
- IP holding
- Global supply chain
- Global R&D
- CFO based here

Malaysia
- SE Asia system architecture and hardware design center

Vietnam
- Cockpit software R&D center

Global Revenue Mix Roadmap

- **2026**
- **2028** › ≥ 30% ex-China
- **2030** › ≥ 50% ex-China

Global

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Global customers: 28 brands, 18 automakers, 12 million vehicles



>12 million ECARX-powered vehicles on the road today

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ECARX addresses automotive needs - clear winner in the space

Automaker Needs	ECARX Delivery
State of the art solutions to excite customers	Competes and wins in the most advanced and competitive software-defined-vehicle market globally
Fully integrated, high performance solutions	Full stack solutions: **Silicon** to **sensors** to **software**
Redeployable and scalable across programs	Diverse product range from entry-level to next-gen, AI-capable high compute
Global	UK headquarters, US listing, 13 countries

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Deep integration with Google Built In

- **Google Built In**, aka Google Automotive Services
- Google Built In delivers Google navigation, voice interaction, app ecosystems and generative AI
- Highly specific certification process: over **5 million test** cases that need to pass with zero deviations
- Multi-stage certification process per model generally taking 12-18 months, which ECARX can **reduce by 50%**[1]

ECARX experience allows this to be significantly reduced:

- Volvo EX30 integration delivered in 10 months
- Polestar 4 integration delivered within 8 months

Google Maps

Google Assistant

Google Play Store

Google Gemini

Android 17
Google Early Access Reference Partner

1. White paper: https://www.linkedin.com/pulse/rapid-integration-google-automotive-services-how-ecarx-halved-time-pbkre/

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Silicon is foundational to ECARX capabilities

Multiple Chip Partners

NVIDIA

arm

Qualcomm

siengine

Incubated within ECARX and ARM China
ECARX remains largest shareholder

Highly Specified Automotive-Grade Silicon



Antora 1000



Pikes

Snapdragon 8 Elite

Zenith



Thor

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Evolving product portfolio increases OEM optionality and drives growth

Venado



2020

- In Vehicle Infotainment (IVI)

Antora 1000



2024

- Cockpit Domain Controller
- Google Automotive Services support
- Multi Domain Integration

Pikes



2025

- AI Agents
- Expanded Multi Domain Integration
- 3D Surround Reality
- Sentry Mode
- Physical Control

Zenith



2027/8

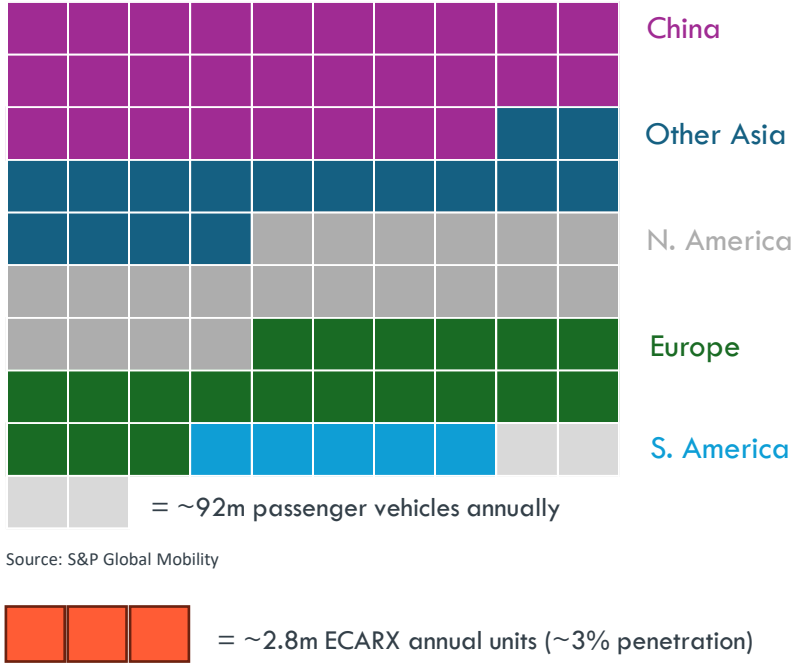
- 640 TOPS NPU - local AI workloads
- Safety Critical Instruments
- L2++ ADAS
- L3+ ADAS architecture support through additional hardware module

Content grows as vehicles become increasingly software-defined and AI-defined

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Potential to capture greater passenger vehicle market

- ECARX competes and wins in the China domestic market, a highly competitive software-defined-vehicle market
- Our global expansion targets 50% of revenue from outside China by 2030
- Our technology is road tested and in 12 million vehicles globally …
- … but this is still scratching the surface of the global market annually
- Multiple expansion routes within passenger vehicles:
  - New program wins for existing OEMs
  - New OEM wins
  - New geographies



Source: S&P Global Mobility

>12 million vehicles on the road, but huge white space

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Robotaxis provide a secondary avenue for global expansion

- April 2026: announced strategic partnership[1] with **US-based May Mobility** to enable next-generation autonomous ride-hail vehicles
- ECARX expected to deliver up to thousands of autonomy-enabled vehicles, including **customised central computing platforms** and **full stack sensor suite**
- Unlocks significant new growth opportunities for ECARX
- **ECARX** bring deep expertise in full-stack intelligent driving solutions and **May Mobility** brings industry-leading autonomous driving system

50%

Targeted cost reduction by 2028

$750m

Announced estimated project value

BCG

THE BOSTON CONSULTING GROUP

Global robotaxi fleet:
700,000 – 3,000,000 vehicles by 2035



1: The actual scope and details of this collaboration, and the actual project value, remain subject to further negotiations and the execution of definitive agreements. The successful deployment of these autonomous platforms is also subject to regulatory determination.

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On track to achieve revenue guidance of $1.0 - $1.1 billion in 2026

Q2 2026

Strengthened confidence going into 2H 2026 with shipment and vehicle launch momentum expected to continue in Q3 and Q4

FY2026 Revenue

US$1 - $1.1 bn

+ 20% - 30% YoY

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- **NASDAQ listed**, ordinary shares

1. FY 2025
2. Q2 2026



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Appendix

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Q2 2026 Financial Results

Achieved four consecutive quarters of positive-adjusted EBITDA

Statement of Operations (US $M)	Q2 2026	Q2 2025
Revenue	$225.2	$155.6
Sale of Goods Revenue	$196.4	$131.2
Software Revenue	$0.7	$1.2
Services Revenue	$28.1	$23.2
Cost of Revenue	$180.7	$138.8
Research & Development Expense	$29.1	$33.8
Selling, General, & Administrative Expense	$21.6	$23.4
Net (Loss) Income	($12.0)	($45.4)

Balance Sheet	Q2 2026	Q4 2025
Cash, Cash Equivalents, and Marketable Securities	$166.0M	$93.2M

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Unaudited Condensed consolidated balance sheets

Millions, except otherwise noted	As of December 31 (Unaudited) 2025 US$	As of June 30 (Unaudited) 2026 US$
ASSETS		
Current assets		
Cash	87.1	156.2
Restricted cash	6.1	9.3
Short-term investments	31.2	46.7
Accounts receivable – third parties, net	14.8	38.4
Accounts receivable – related parties, net	185.5	209.7
Notes receivable	6.0	2.9
Inventories	62.3	126.2
Amounts due from related parties	53.7	45.8
Prepayments and other current assets	36.5	61.9
Total current assets	**483.2**	**697.1**
Non-current assets		
Long-term investments	61.5	61.6
Property and equipment, net	26.7	32.4
Intangible assets, net	40.4	43.6
Operating lease right-of-use assets	16.8	13.7
Goodwill	3.7	3.8
Other non-current assets – third parties	30.2	43.4
Other non-current assets – related parties	--	90.4
Total non-current assets	**179.3**	**288.9**
Total assets	**662.5**	**986.0**

	As of December 31 (Unaudited) 2025 US$	As of June 30 (Unaudited) 2026 US$
LIABILITIES		
Current liabilities		
Short-term borrowings	310.7	444.8
Accounts payable - third parties	192.8	251.4
Accounts payable - related parties	104.5	45.9
Notes payable	19.3	21.0
Amounts due to related parties	54.6	91.5
Contract liabilities, current - third parties	0.1	0.1
Contract liabilities, current - related parties	7.3	3.8
Operating lease liabilities - current	5.0	5.0
Convertible notes payable - current	38.8	24.7
Accrued expenses and other current liabilities	88.9	79.3
Income tax payable	1.0	1.0
Total current liabilities	**823.0**	**968.5**
Non-current liabilities		
Contract liabilities, non-current - related parties	--	--
Long-term borrowings	5.6	111.8
Convertible notes payable, non-current	60.3	101.6
Operating lease liabilities, non-current	15.7	12.8
Warrant liabilities, non-current	1.1	1.0
Provisions	17.8	18.5
Other non-current liabilities - third parties	20.7	21.2
Deferred tax liabilities	1.7	1.7
Total non-current liabilities	**122.9**	**268.6**
Total liabilities	**945.9**	**1,237.1**

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Unaudited Condensed consolidated balance sheets

	As of December 31 (Unaudited)	As of June 30 (Unaudited)
Millions, except otherwise noted	2025	2026
	US$	US$
SHAREHOLDERS' DEFICIT		
Ordinary Shares	-	-
Additional paid-in capital	958.1	1,019.5
Treasury shares, at cost	(30.0)	(39.9)
Accumulated deficit	(1,190.5)	(1,213.3)
Accumulated other comprehensive loss	(20.2)	(31.1)
Total deficit attributable to ordinary shareholders	**(282.6)**	**(264.8)**
Non-redeemable non-controlling interests	(0.8)	(1.1)
Total shareholders' deficit	**(283.4)**	**(265.9)**
Liabilities and shareholders' deficit	**662.5**	**986.0**

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Unaudited Consolidated statements of operations and comprehensive loss

Millions, except otherwise noted	Six Months Ended June 30 (Unaudited)		Three Months Ended June 30 (Unaudited)	
	2025	2026	2025	2026
	US$	US$	US$	US$
Revenue				
Sales of goods revenue	251.9	310.2	131.2	196.4
Software license revenues	26.8	2.3	1.2	0.7
Service revenues	44.6	44.2	23.2	28.1
Total revenues	**323.3**	**356.7**	**155.6**	**225.2**
Cost of goods sold	(226.9)	(264.5)	(117.6)	(167.0)
Cost of software licenses	(16.5)	(1.4)	(2.2)	(0.7)
Cost of services	(29.9)	(18.1)	(19.0)	(13.0)
Total cost of revenues	**(273.3)**	**(284.0)**	**(138.8)**	**(180.7)**
Gross profit	**50.0**	**72.7**	**16.8**	**44.5**
Research and development expenses	(68.3)	(52.6)	(33.8)	(29.1)
Selling, general and administrative expenses and others, net	(46.8)	(39.3)	(23.4)	(21.6)
Total operating expenses	**(115.1)**	**(91.9)**	**(57.2)**	**(50.7)**
(Loss)/Income from operation	**(65.1)**	**(19.2)**	**(40.4)**	**(6.2)**
Interest income	1.6	2.5	0.9	1.3
Interest expenses	(10.2)	(18.0)	(5.5)	(8.3)
Share of results of equity method investments	0.1	14.2	--	--
Others, net	3.6	(1.5)	1.4	1.1
(Loss)/Profit before income taxes	**(70.5)**	**(22.0)**	**(43.6)**	**(12.1)**
Income tax (expense)/benefit	(2.1)	(1.0)	(1.8)	0.1
Net (Loss)/Profit	**(72.6)**	**(23.0)**	**(45.4)**	**(12.0)**
Net loss/(profit) attributable to noncontrolling interests	3.6	0.3	2.4	(0.1)
Net loss attributable to redeemable non-controlling	--	1.7	--	1.7
Net (loss)/profit attributable to ECARX Holdings Inc. ordinary shareholders	**(69.0)**	**(21.0)**	**(43.0)**	**(10.4)**
Net (loss)/profit	**(72.6)**	**(23.0)**	**(45.4)**	**(12.0)**
Other comprehensive (loss)/income:				
Fair value change of long-term investment in Convertible	--	(2.8)	--	(2.1)
Foreign currency translation adjustments, net of nil income taxes	(5.2)	(8.1)	(3.9)	(4.1)
Comprehensive (loss)/income	**(77.8)**	**(33.9)**	**(49.3)**	**(18.2)**
Comprehensive loss/(income) attributable to non-redeemable noncontrolling interests	3.6	0.3	2.4	(0.1)
Comprehensive loss/ (income) attributable to redeemable non-controlling interests	--	1.7	--	1.7
Accretion of redeemable non-controlling interests	--	(1.8)	--	(1.8)
Comprehensive (loss)/income attributable to ECARX Holdings Inc.	**(74.2)**	**(33.7)**	**(46.9)**	**(18.4)**
(Loss)/Earnings per ordinary share				
Basic (loss)/earnings per share, ordinary shares	(0.2)	(0.06)	(0.13)	(0.03)
Diluted (loss)/earnings per share, ordinary shares	(0.2)	(0.06)	(0.13)	(0.03)
Weighted average number of ordinary shares used in computing loss per ordinary share				
- Weighted average number of ordinary shares - Basic	337,210,153	368,244,708	341,773,717	372,314,747
- Weighted average number of ordinary shares - Diluted	337,210,153	368,244,708	341,773,717	372,314,747

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Unaudited Reconciliation of GAAP and Non-GAAP Results

We use adjusted EBITDA in evaluating our operating results and for financial and operational decision-making purposes. Adjusted EBITDA is defined as net loss excluding interest income, interest expense, income tax expenses, depreciation of property and equipment, amortization of intangible assets, and share-based compensation expenses.

Adjusted EBITDA should not be considered in isolation or construed as alternatives to net loss or any other measures of performance or as indicators of our operating performance. Investors are encouraged to compare our historical adjusted EBITDA to the most directly comparable GAAP measure, net loss. Adjusted EBITDA presented here may not be comparable to similarly titled measures presented by other companies. Other companies may calculate similarly titled measures differently, limiting their usefulness as comparative measures to our data. We encourage investors and others to review our financial information in its entirety and not rely on a single financial measure.

	Six Months Ended June 30 (Unaudited)		Three Months Ended June 30 (Unaudited)	
Millions, except otherwise noted	2025	2026	2025	2026
	US$	US$	US$	US$
Net (Loss)/Profit	**(72.6)**	**(23.0)**	**(45.4)**	**(12.0)**
Interest income	(1.6)	(2.5)	(0.9	(1.3)
Interest expense	10.2	18.0	5.5	8.3
Income tax (benefit)/ expense	2.1	1.0	1.8	(0.1)
Depreciation of property and equipment	3.5	3.8	1.7	2.0
Amortization of intangible assets	7.6	5.7	3.8	3.1
EBITDA	**(50.8)**	**3.0**	**(33.5)**	**(0.0)**
Share-based compensation expenses	6.5	1.5	3.7	0.5
Adjusted EBITDA	**(44.3)**	**4.5**	**(29.7)**	**0.5**

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Acquisition of Flyme software business expands ECARX's product portfolio

Strengthening competitive advantage with end-to-end software architecture

Flyme Auto OS already deployed by ECARX in over 2 million vehicles

Flyme Auto

In-vehicle cockpit OS with full-stack software spanning cabin interaction, mobile-IoT-vehicle connectivity, core middleware, UI/UX frameworks, and development tools.

Flyme OS

Flyme OS is a mature mobile operating system built on more than 15 years of continuous R&D iteration and mass-market deployment experience with proven scalable commercial traction and mature industrialization capacity.

- **Roadmap control:** Flyme Auto sits as the application and interaction layer above ECARX's Cloudpeak middleware. Owning it means ECARX no longer coordinates its cockpit roadmap with third parties, which shortens integration timelines for automakers and accelerates time to market.
- **Strengthening software revenue:** Flyme generates revenue today from software licensing, custom development work, and intelligent cockpit system delivery. Flyme full-stack OS positions ECARX to capture a significantly larger share of this long-term growth opportunity with a proprietary, end-to-end software architecture.
- **Interoperability:** The platform delivers seamless cross-device interconnection between vehicles, smartphones and wearables, with native in-car AI functionality and native compatibility across ecosystems, including Flyme Auto in China and Google Built-In.
- **Enhancing AI capabilities:** Workbuddy, a Tencent Cloud AI-powered smart work assistant, will be deployed across the Flyme ecosystem, building upon the existing Flyme AI-assistant and granting all Flyme-powered devices agentic AI capabilities

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Co-developing the ORCA LiDAR with TPK

New LiDAR platform for global markets, deepening hardware and software integration

Reliable solutions for global OEMs and robotaxi partners

ECARX	TPK
System integration and sensor fusion	Contribute optical design and engineering expertise
Global commercialization leveraging relationships	High-volume manufacturing of precision components

The new LiDAR platform will enable seamless hardware-software integration, low-latency perception, and strong performance for next-generation ADAS and AI-enabled autonomous driving

Mass production is expected to begin in 2028

Manufacturing will take place at TPK's Thailand facility

Supporting complex global programs

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