



CHRYSLER

Q4 and FY 2012 Results Review

(U.S. GAAP – Preliminary)

January 30, 2013

“3 down, 2 to go”



DODGE 



Jeep

SRT



Forward-Looking Statement



This document contains forward-looking statements that reflect management's current views with respect to future events. The words "anticipate," "assume," "believe," "estimate," "expect," "intend," "may," "plan," "project," "should" and similar expressions identify forward-looking statements. Such statements are subject to risks and uncertainties, including, but not limited to: the effective implementation of the Chrysler Group LLC 2010 – 2014 Business Plan outlined on November 4, 2009, and subsequent updates, including successful vehicle launches; industry SAAR levels; continued economic weakness, especially in North America, including continued high unemployment levels and limited availability of affordably priced financing for our dealers and consumers; introduction of competing products and competitive pressures which may limit our ability to reduce sales incentives; supply disruptions resulting from natural disasters and other events impacting our supply chain; and our ability to realize benefits from our

industrial alliance with Fiat, particularly in light of the economic crisis currently affecting several European countries. In addition, any projections or targets on future performance are based on the assumption that the Company maintains its status as a partnership for U.S. federal and state income tax purposes and do not consider the impact of a potential conversion into a corporation. If any of these or other risks and uncertainties occur, or if the assumptions underlying any of these statements prove incorrect, then actual results may be materially different from those expressed or implied by such statements. We do not intend or assume any obligation to update any forward-looking statement, which speaks only as of the date on which it is made. Further details of potential risks that may affect Chrysler Group are described in Chrysler Group's 2011 Annual Report on Form 10-K, and its subsequent periodic reports filed with the U.S. Securities and Exchange Commission.

January 30, 2013

(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Executive Summary

Highlights



- FY 2012 Worldwide vehicle sales increased 18% from 2011; U.S. vehicle sales increased 21%
 - U.S. market share up 70 bps from 2011 to 11.2%
- Shipments for 2012 totaled more than 2.4M vehicles, up 20% over 2011. Revenues totaled \$66B, also up 20% over 2011, exceeding full year guidance
- Modified Operating Profit improved 47% year-over-year to \$2.9B
- Net income increased to \$1.7B in 2012, above guidance and up eight-fold from \$183M a year ago; full-year 2011 Adjusted Net Income was \$734M*
- Free Cash Flow closed the year at \$2.2B, well above the \$1B guidance
- Product momentum continuing
 - Ram 1500 Pickup named *Motor Trend's* Truck of the Year and North American Truck/Utility of the Year
 - Record global Jeep sales
- Chrysler Group received a demand from the UAW Retiree Medical Benefits Trust (VEBA) in January 2013 pursuant to the Shareholder Agreement, seeking registration of approximately 16.6% of Chrysler Group's outstanding equity interests currently owned by VEBA

* - Excludes \$551 million loss on extinguishment of debt

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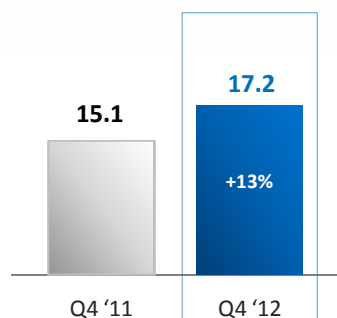
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Q4 2012 Financial Highlights



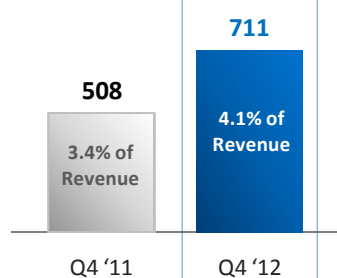
Net Revenue (\$B)

- Growth primarily driven by increased volumes and positive pricing, partially offset by unfavorable mix
- Worldwide shipments up 13% to 613k units (623k shipments adjusted for GDP units)



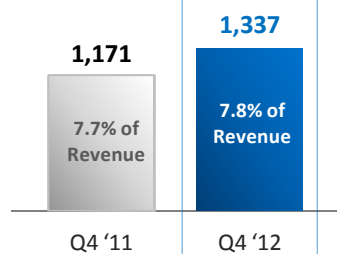
Modified Operating Profit (\$M)

- Modified Operating Profit increased 40% versus prior year
- Improved performance primarily attributable to increased shipments and positive pricing, partially offset by unfavorable mix, and increased manufacturing, ER&D and advertising costs



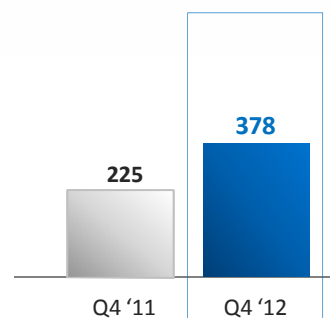
Modified EBITDA (\$M)

- Modified EBITDA increased 14% versus prior year primarily driven by higher volumes and positive pricing



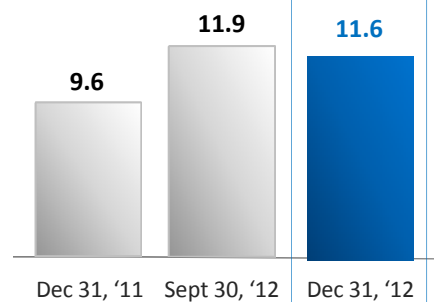
Net Income (\$M)

- Net income increased \$153M, or 68%, versus the prior year



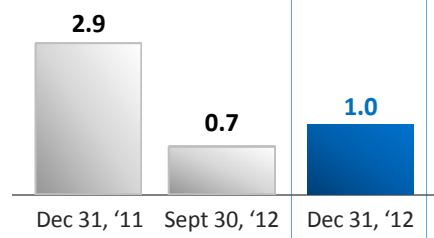
Cash (\$B)

- Negative Free Cash Flow of \$0.3B in Q4 2012 primarily due to seasonal negative working capital effects and capital expenditures, partially offset by strong operating performance
- Total liquidity of \$12.9B, including \$1.3B available under a revolving credit facility



Net Industrial Debt (\$B)

- Net Industrial Debt increased to \$1.0B, primarily due to negative free cash flow during the quarter



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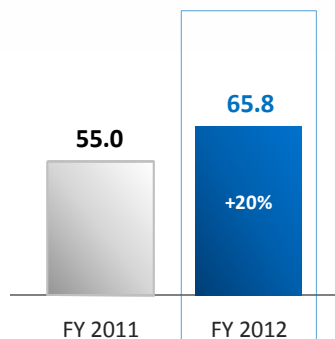
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FY 2012 Financial Highlights



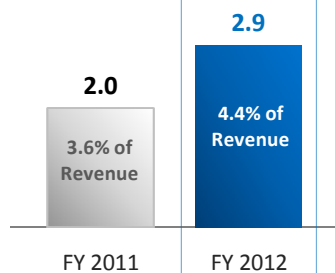
Net Revenue (\$B)

- Growth primarily driven by increased volumes and positive pricing, partially offset by unfavorable mix
- Worldwide shipments up 20% to 2,409k units (2,432k shipments adjusted for GDP units)



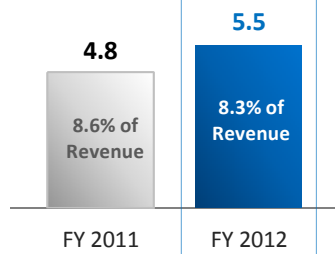
Modified Operating Profit (\$B)

- Modified Operating Profit increased 47% versus prior year
- Improved performance primarily attributable to increased shipments and positive pricing, partially offset by unfavorable mix, increased ER&D and advertising costs and content enhancements on new vehicles



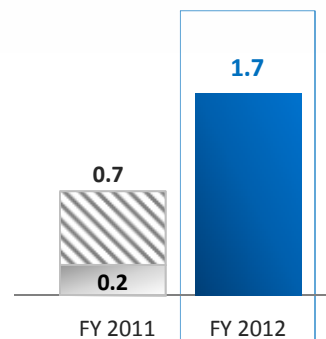
Modified EBITDA (\$B)

- Modified EBITDA increased 15% versus prior year primarily driven by higher volumes and positive pricing
- Margin reduced due to unfavorable mix, increased ER&D and advertising costs and content enhancements



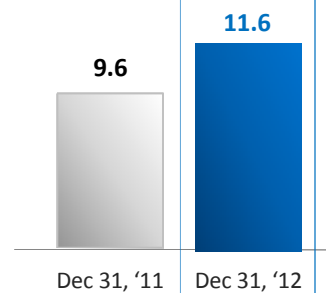
Net Income (\$B)

- Net income increased \$1.5B versus the prior year
- FY 2011 Adjusted Net Income was \$0.7B (which excludes a loss on extinguishment of debt of \$551M in Q2 2011)



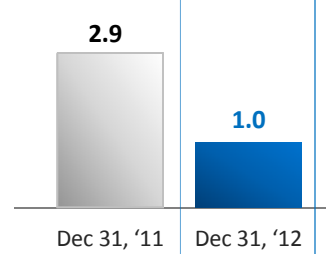
Cash (\$B)

- Free Cash Flow of \$2.2B drove the increase in cash of \$2.0B
- Total liquidity of \$12.9B, including \$1.3B available under a revolving credit facility



Net Industrial Debt (\$B)

- Net Industrial Debt decreased to \$1.0B, primarily due to positive free cash flow during 2012



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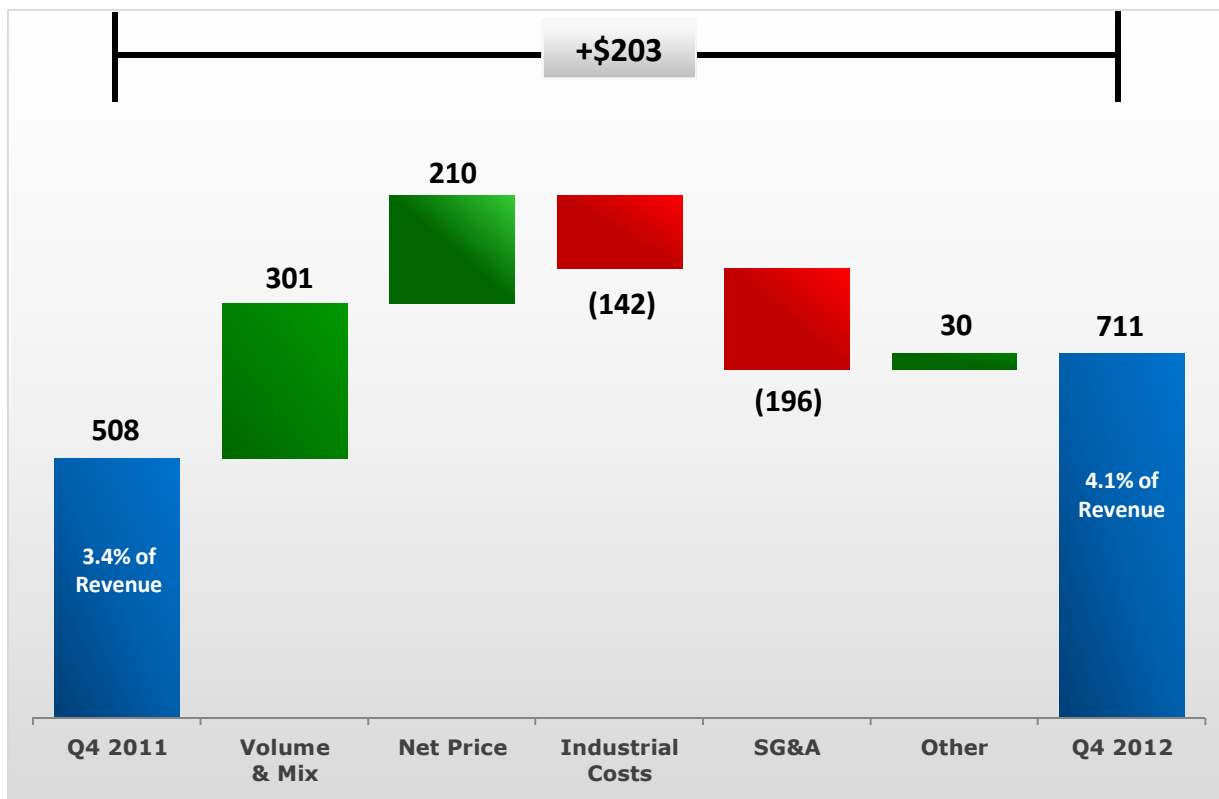
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Modified Operating Profit Walk

Q4 2011 to Q4 2012



\$ Millions



- Volume increase of 70k vehicle shipments (63k vehicle shipments adjusted for GDP – see Appendix) was partially offset by unfavorable mix, including higher growth in passenger car sales vs. trucks and SUVs
- Positive net price reflects pricing actions during 2012 driven by vehicle content enhancements
- Industrial costs impacted by increased ER&D and higher manufacturing costs related to additional shifts and higher capacity utilization, partially offset by purchasing and WCM efficiencies
- SG&A negatively impacted by higher advertising costs and headcount costs to support business growth
- Other primarily reflects positive FX impacts

Modified Operating Profit increase primarily driven by volume growth

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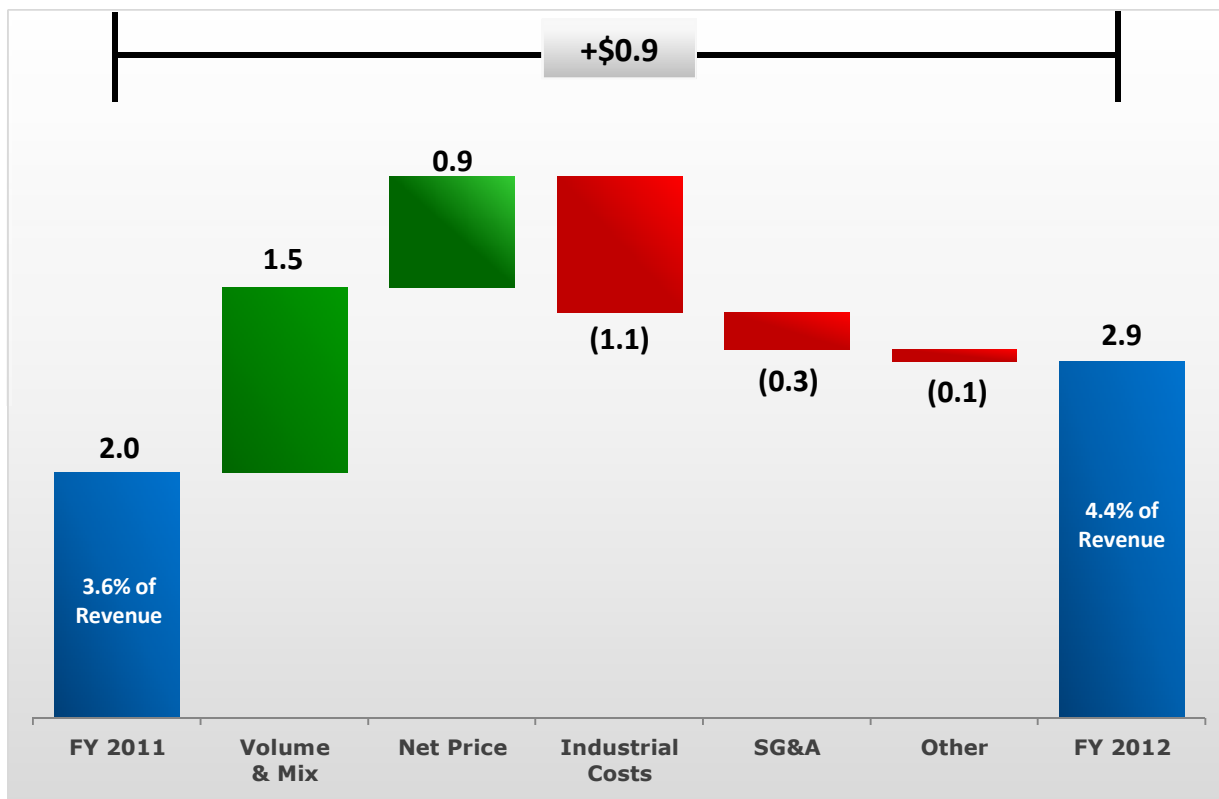
(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Modified Operating Profit Walk

FY 2011 to FY 2012



\$ Billions



- Volume increase of 398k vehicle shipments (439k vehicle shipments adjusted for GDP – see Appendix) was partially offset by unfavorable mix, including higher growth in passenger car sales vs. trucks and SUVs
- Positive net price reflects pricing actions during 2012 driven by vehicle content enhancements
- Industrial costs impacted by vehicle content enhancements, increased manufacturing and ER&D costs, partially offset by purchasing and WCM efficiencies, reduced depreciation and amortization expense and reduced warranty costs
- SG&A negatively impacted by higher advertising costs
- Other primarily reflects negative FX impacts

Modified Operating Profit consistently growing over the past two years

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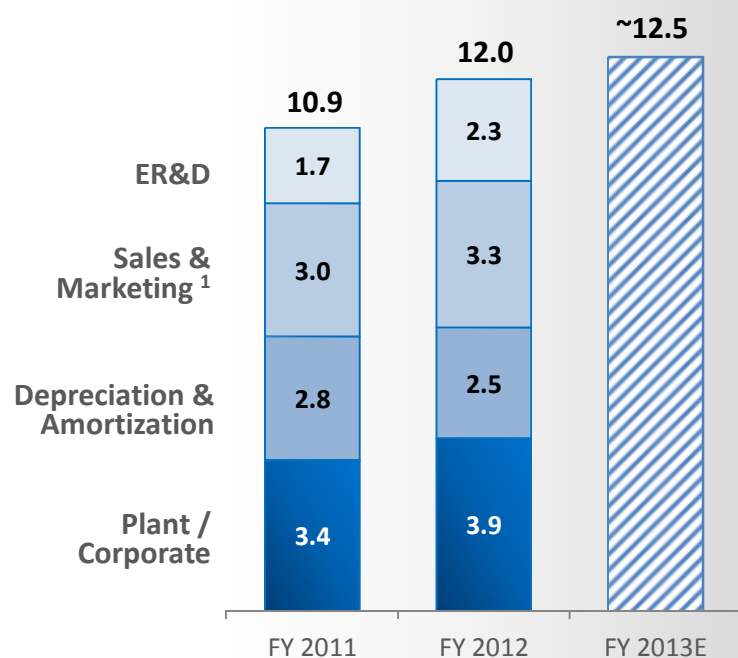
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Structural Costs and Capital Expenditures



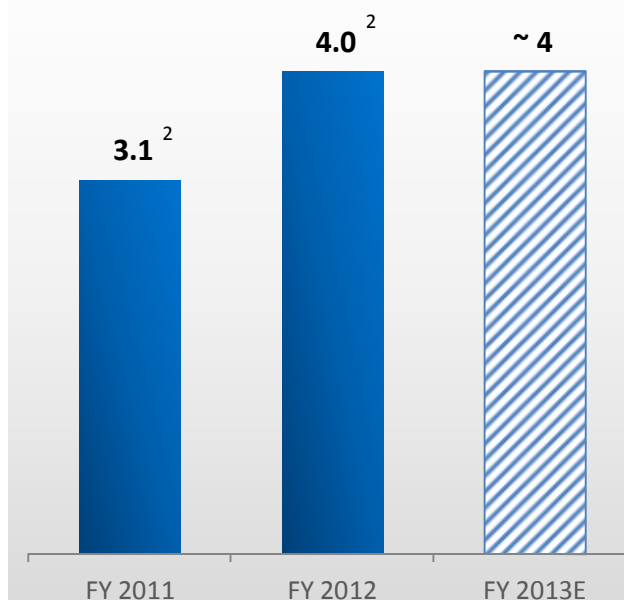
\$ Billions

Structural Costs



Structural cost increases primarily attributable to additional plant shifts, advertising and continued ER&D spending

Capital Expenditures



Full year 2013 capital expenditures expected to continue at ~\$4B

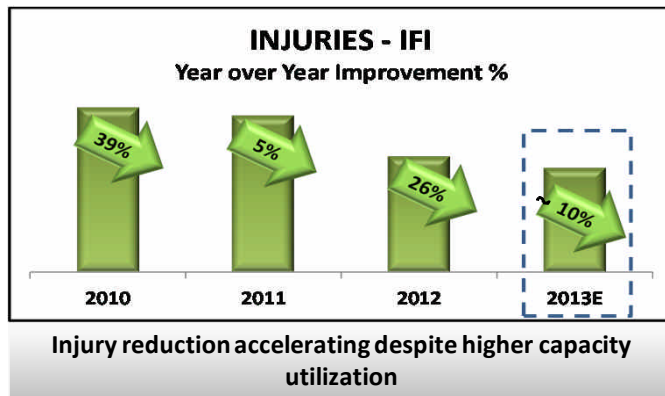
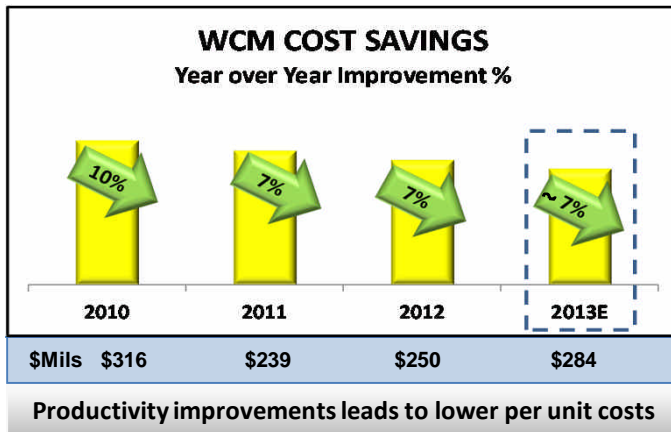
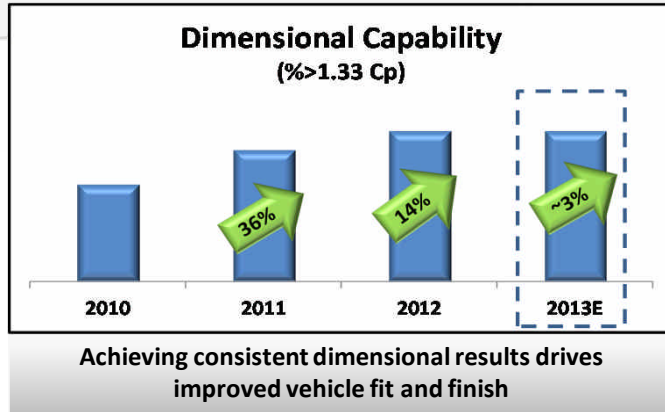
¹ Includes certain advertising costs which were not previously reported as structural cost (\$0.2B in 2011 and 2012)

² Includes non-cash expenditures of \$0.1B in 2011 and \$0.4B in 2012

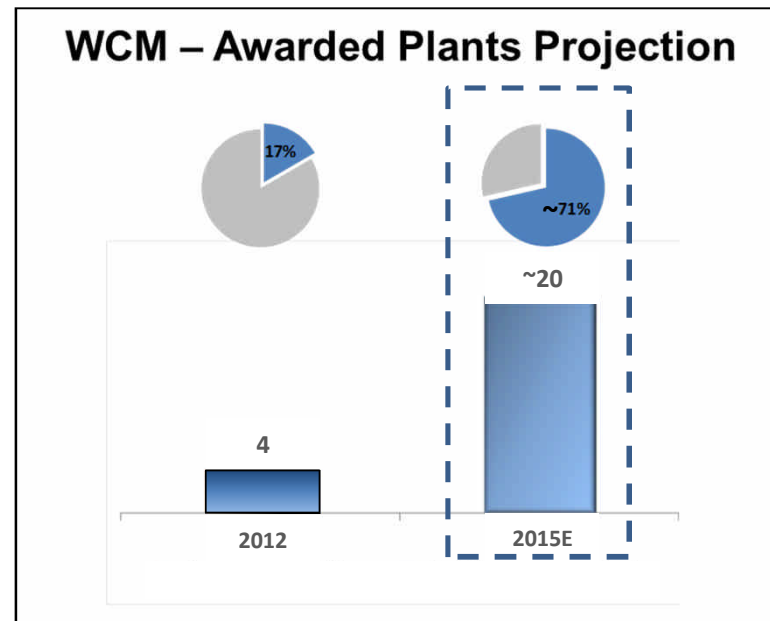
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World Class Manufacturing Update



- Four “Bronze” level plants – Dundee Engine (Q2), Windsor Assembly (Q2), Toledo Complex (Q3) and Saltillo Assembly (Q4)
- Started production of 8-speed transmission in Q4 and added 3rd crew at Jefferson North Assembly Plant
- Eligible UAW represented employees are recognized through WCM and Quality Bonus compensation
- Key Suppliers engaged in WCM Lite pilot phase
- WCM Lite Supplier Convention held in October involving 75 supplier plants and 160 commodity suppliers



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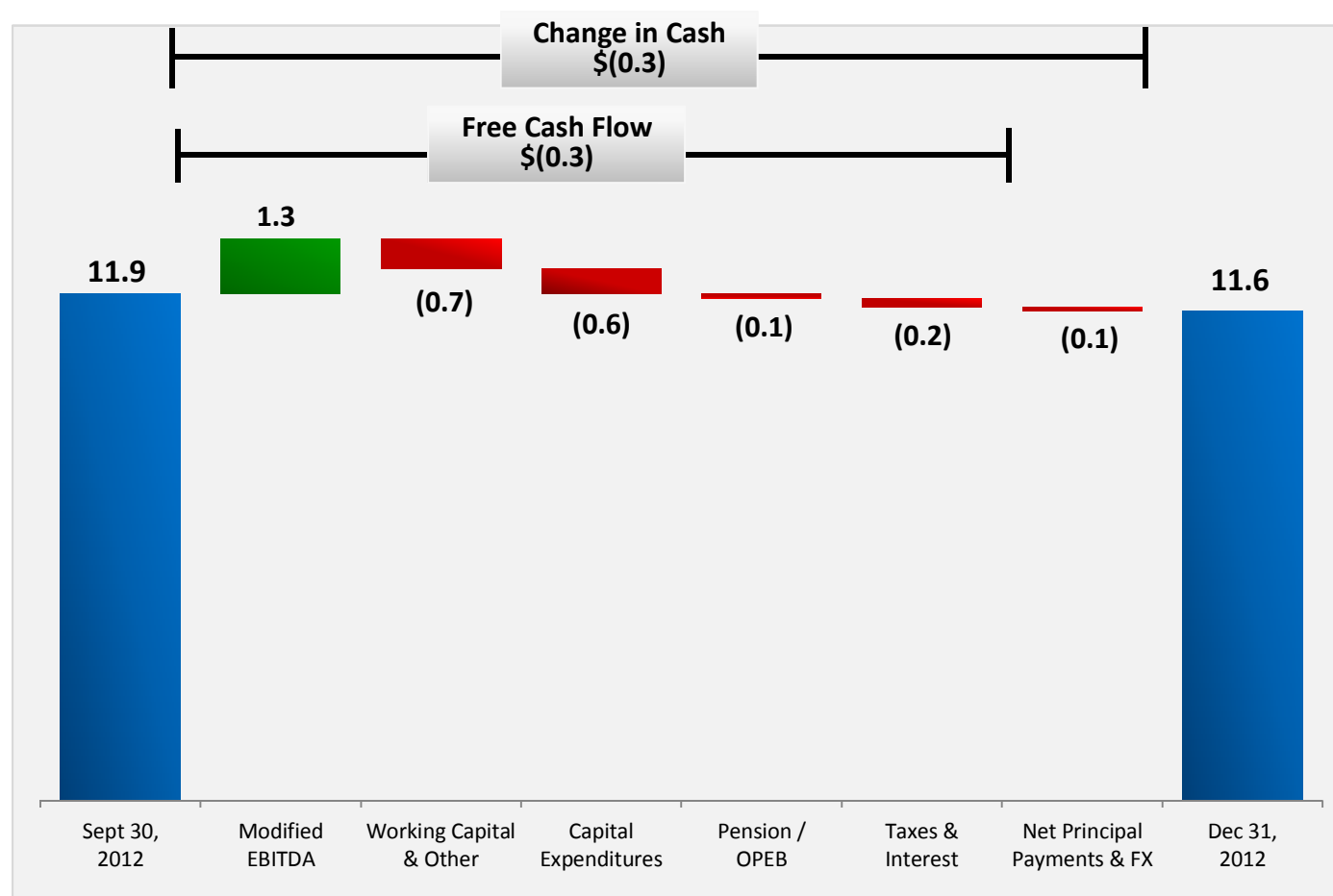
(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Cash Walk

September 30, 2012 to December 31, 2012



\$ Billions



- Negative Free Cash Flow driven by seasonal negative working capital effects and capital expenditures

Note: Numbers may not add due to rounding

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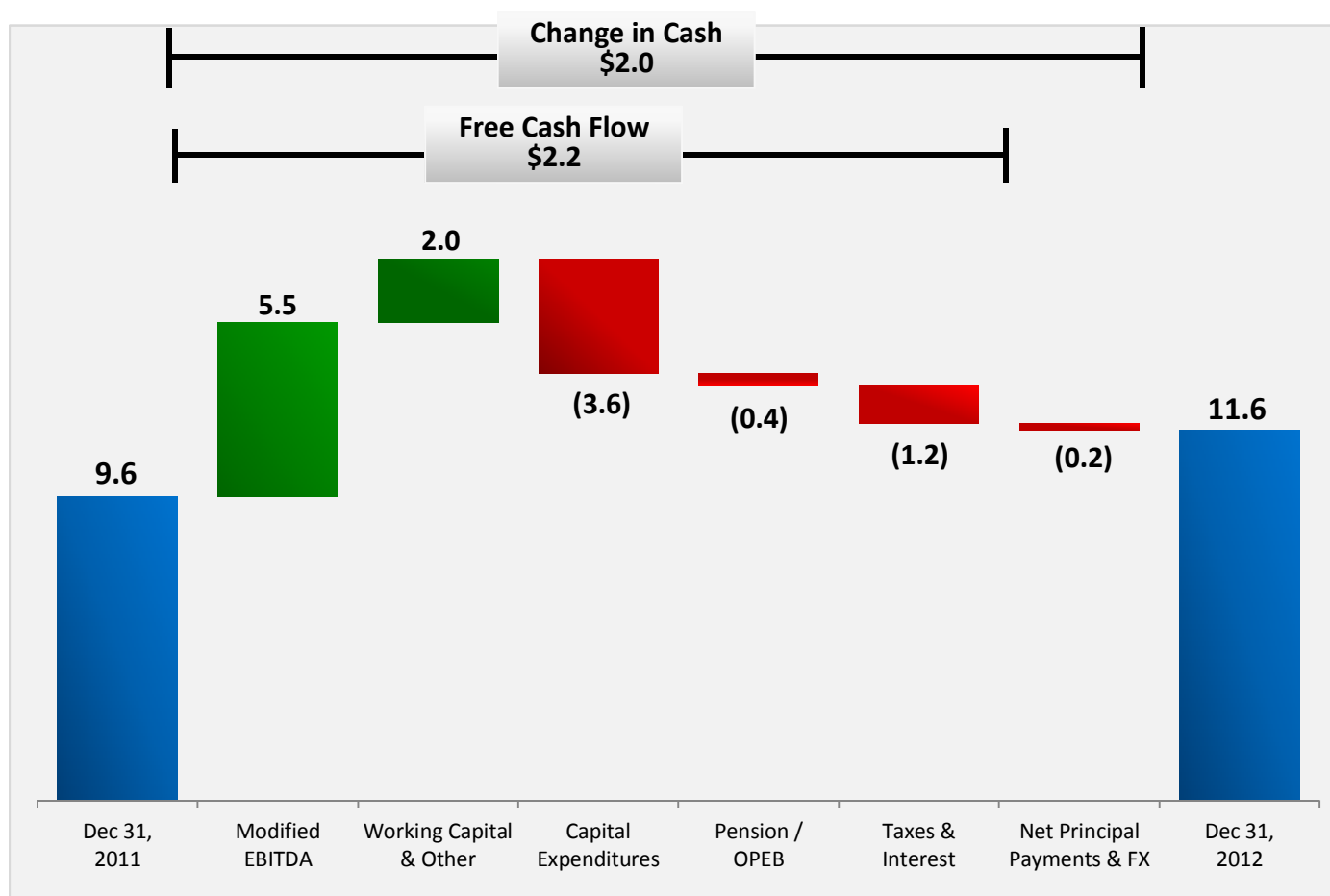
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Cash Walk

December 31, 2011 to December 31, 2012



\$ Billions



- Free Cash Flow driven by strong operating performance and working capital effects, partially offset by capital expenditures and interest payments
- Capital expenditures primarily driven by new Dodge Dart, Jeep Grand Cherokee and Ram 1500 pickup renewals, new D-SUV and 8- and 9-speed transmission investments

Note: Numbers may not add due to rounding

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Net Industrial Debt



\$ Billions

	Carrying Value as of Dec 31, 2012	Carrying Value as of Sept 30, 2012	Dec 31, 2012 B/(W) Sept 30, 2012	Carrying Value as of Dec 31, 2011	Dec 31, 2012 B/(W) Dec 31, 2011
Cash	11.6	11.9	(0.3)	9.6	2.0
Term Loan B	2.9	2.9	-	2.9	-
Secured Senior Notes	3.2	3.2	-	3.2	-
VEBA Trust Note	4.3	4.3	-	4.2	(0.1)
Canadian Health Care Trust Notes	1.1	1.1	-	1.0	(0.1)
Mexican Development Banks Credit Facilities	0.6	0.6	-	0.6	-
Other Financial Liabilities ¹	0.5	0.6	-	0.7	0.1
Gross Industrial Debt	12.6	12.6	-	12.5	(0.1)
Net Industrial Debt ²	1.0	0.7	(0.3)	2.9	1.9

¹ Excludes Gold Key Lease (GKL) self-liquidating debt

² Excludes pension and OPEB underfunding

Note: Numbers may not add due to rounding

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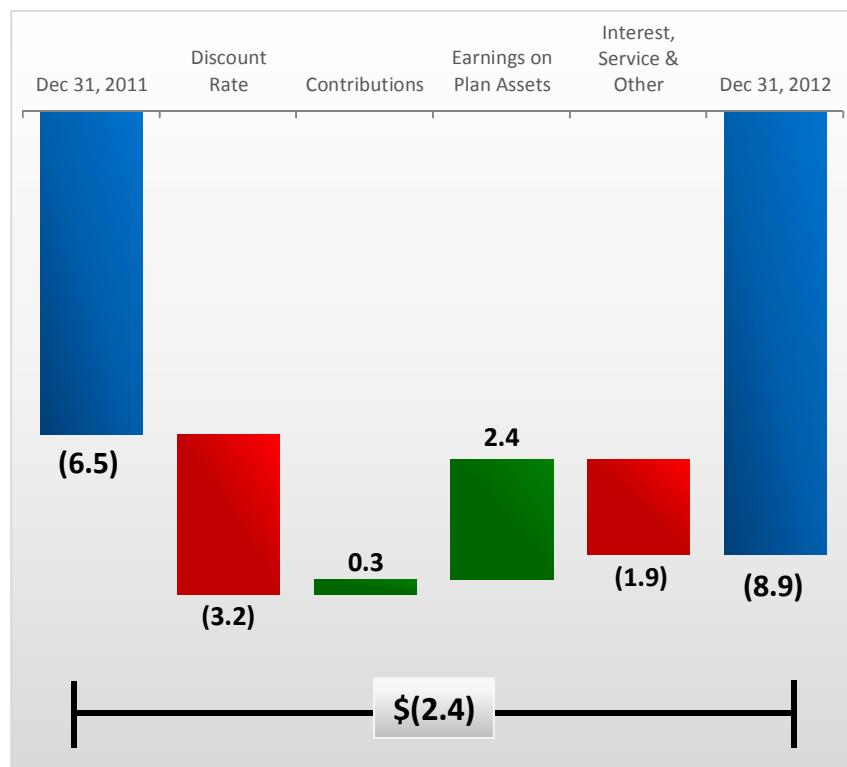
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Pension and OPEB Plans Funded Status

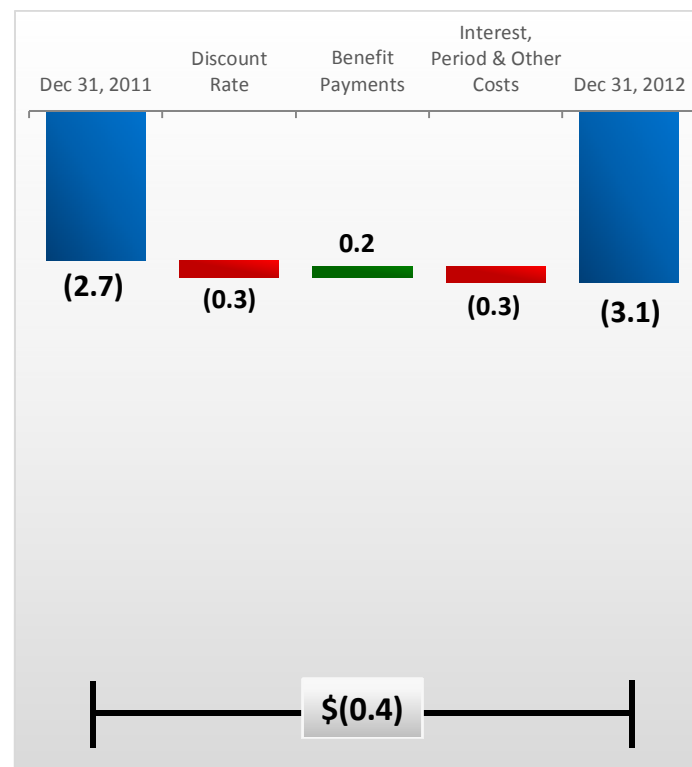


\$ Billions

Pension Plan Funded Status



OPEB Funded Status



- Pension underfunded status increased primarily due to a reduction in the discount rate
- A ± 100 basis point change in the discount rate would impact pension obligations by ~\$4 billion

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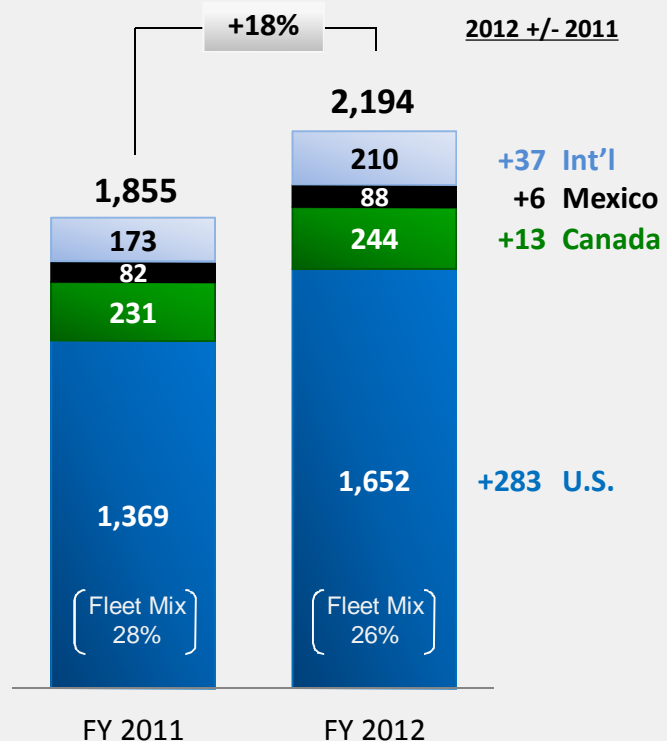
Worldwide Vehicle Sales

FY 2012 versus FY 2011

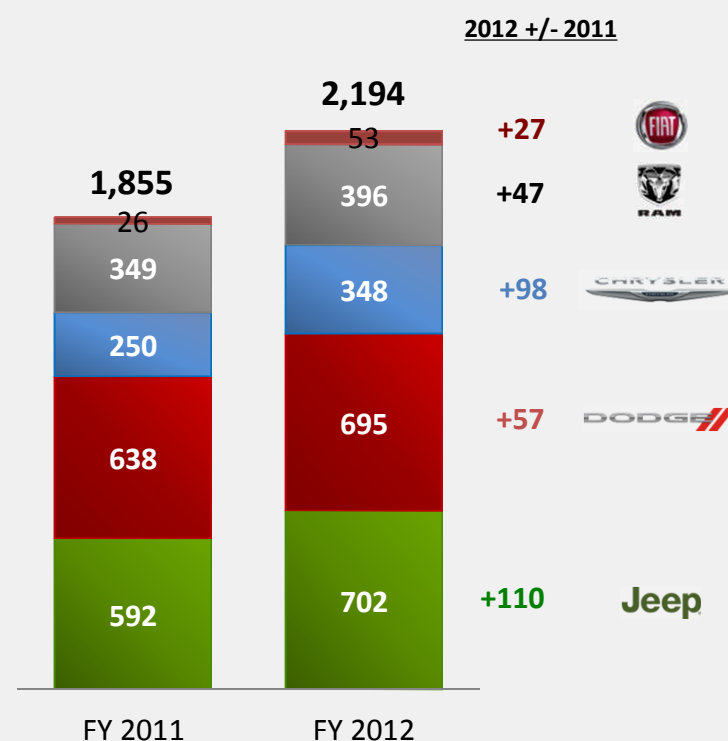


Vehicles (000s)

By Market



By Brand



- FY 2012 worldwide vehicle sales totaled 2.2 million units, up 18% from FY 2011
- Q4 2012 worldwide vehicle sales totaled 533k units, up 11% from 479k units in Q4 2011



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Vehicle Sales in U.S. & Canada

FY 2012 versus FY 2011



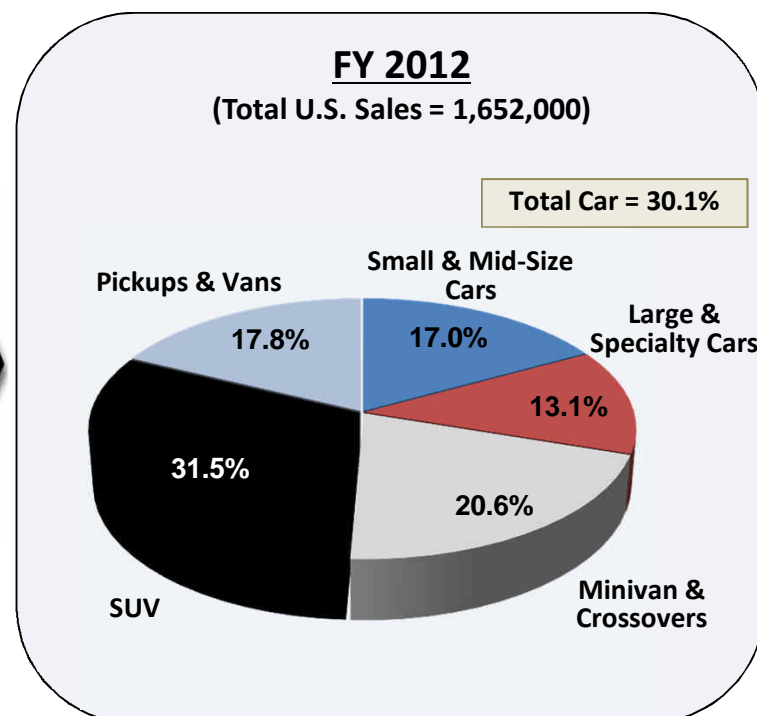
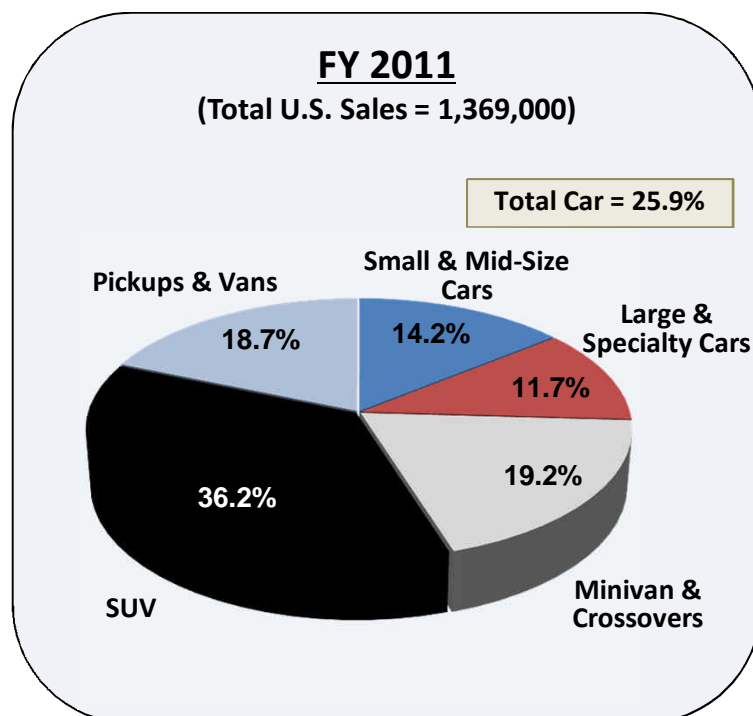
Industry Vehicles (mils)	Chrysler Group performance (FY 2012 vs. FY 2011)		
	Sales	Market share	Key Messages (period-over-period)
 <p>Bar chart showing U.S. industry vehicle sales in millions for FY 2011 and FY 2012. The bar for FY 2011 is 13.0 and for FY 2012 is 14.8, with a +13% increase indicated by a blue arrow.</p> <p>FY 2011 FY 2012</p>	+21%	11.2% (up 70 bps)	<ul style="list-style-type: none"> • Retail sales (excluding fleet) increased 23% • Retail of retail market share* increased to 10.2%, up 80 bps from the prior year • Fleet mix at 26% vs. 28% in the prior year • Key performers included: <ul style="list-style-type: none"> • Fiat 500 +24k vehicles (+121%) • Chrysler 300 +34k vehicles (+95%) • Chrysler 200 +38k vehicles (+44%) • Chrysler/Dodge minivans +48k vehicles (+23%) • Jeep Grand Cherokee +27k vehicles (+21%)
 <p>Bar chart showing Canadian industry vehicle sales in millions for FY 2011 and FY 2012. The bar for FY 2011 is 1.6 and for FY 2012 is 1.7, with a +6% increase indicated by a blue arrow.</p> <p>FY 2011 FY 2012</p>	+6%	14.2% (down 10 bps)	<ul style="list-style-type: none"> • Retail sales (excluding fleet) increased 5% • Retail of retail market share* was 12.7% down 20 bps from the prior year • Key performers included: <ul style="list-style-type: none"> • Chrysler 200 +7k vehicles (+97%) • Chrysler 300 +3k vehicles (+89%) • Fiat 500 +3k vehicles (+57%) • Jeep Wrangler +3k vehicles (+21%)

* - Company calculation; retail sales (excluding fleet) versus industry retail sales (excluding fleet)

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Chrysler Group U.S. Sales by Vehicle Segment



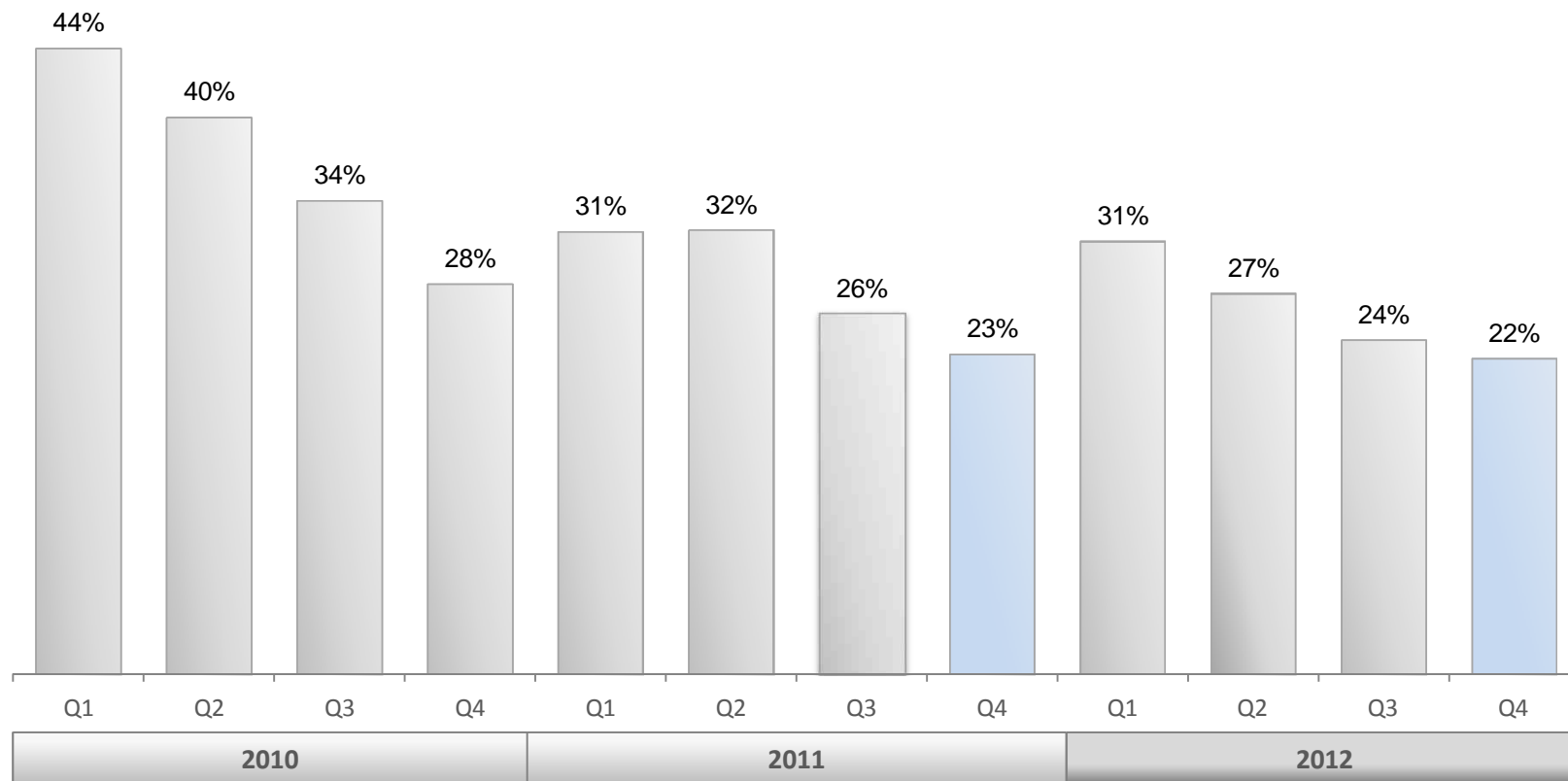
Chrysler Group's passenger car sales increased 41% year-over-year, increasing overall car mix from 26% of total sales in 2011 to over 30% in 2012

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U.S. Fleet Mix

Percent of Total U.S. Sales



Full Year Fleet Mix

36%

28%

26%

Overall U.S. fleet mix has been declining as retail sales grow

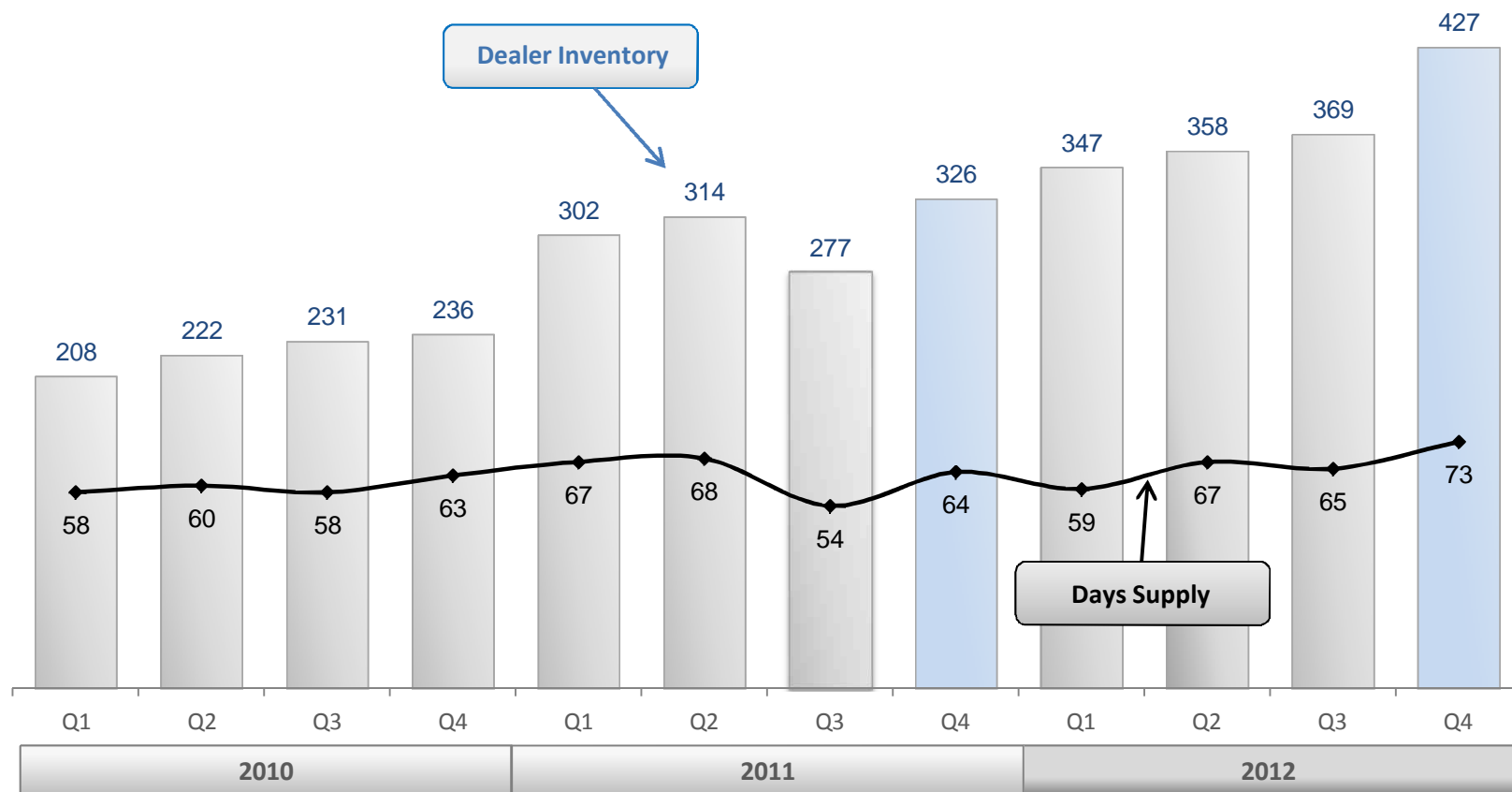
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U.S. Dealer Inventory and Days Supply



Vehicles (000s)



Days supply at U.S. dealers increased primarily driven by deliveries of the newly launched Dodge Dart and 2013 Ram 1500 pickup

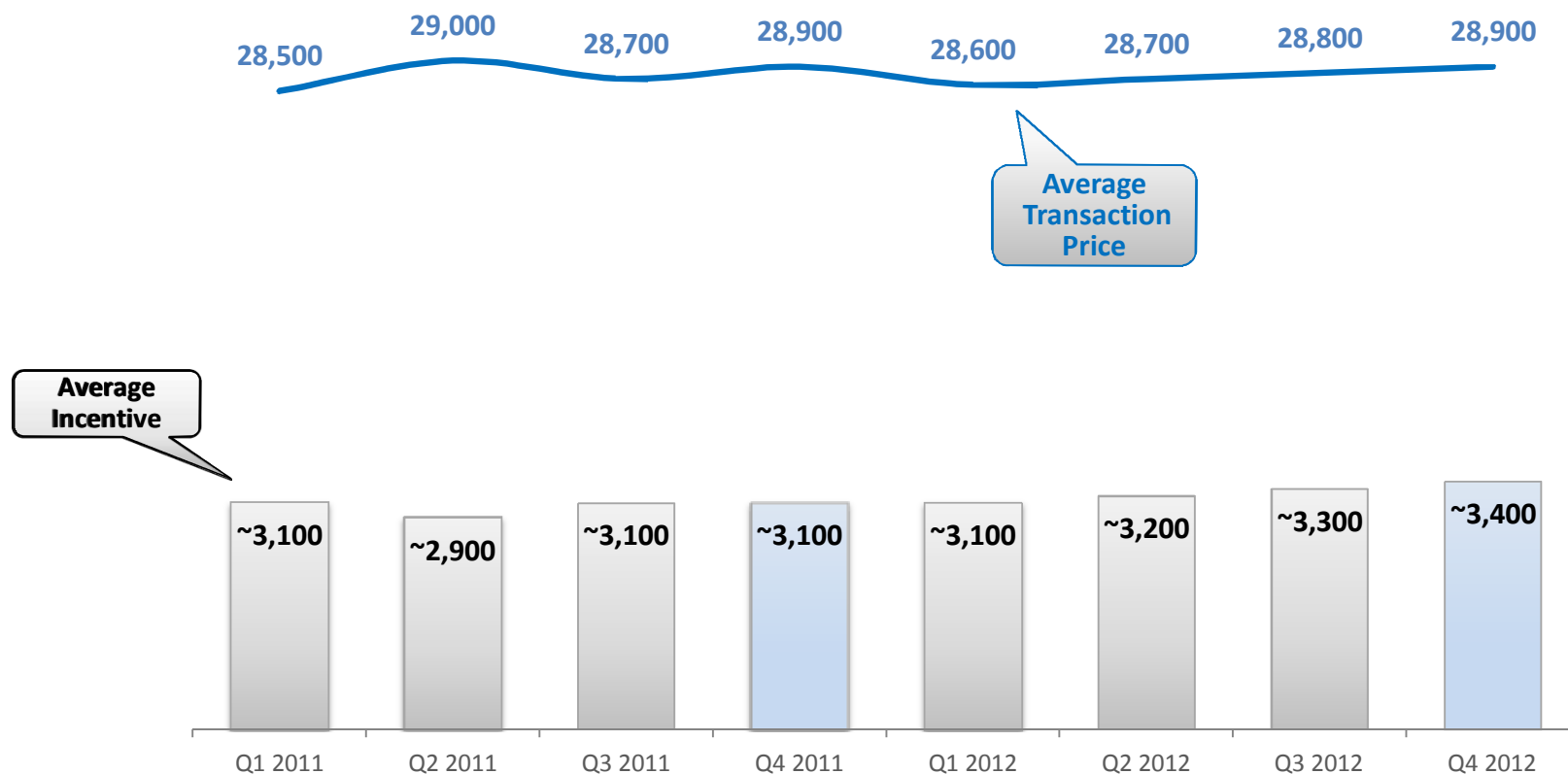
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U.S. Retail Average Transaction Price



\$ Per Unit



Transaction prices remain consistent despite incentives slightly up due to year-end sales events

Source: Based on J.D. Power and Associates data (at constant Q4 2012 sales nameplate mix)

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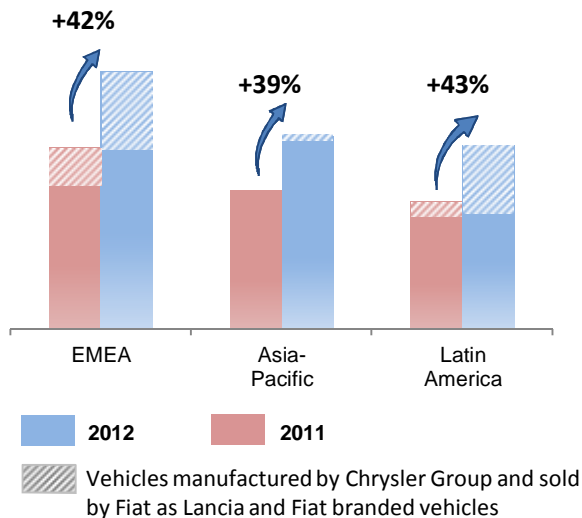
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Chrysler Group International Sales

Growth continues in all International regions

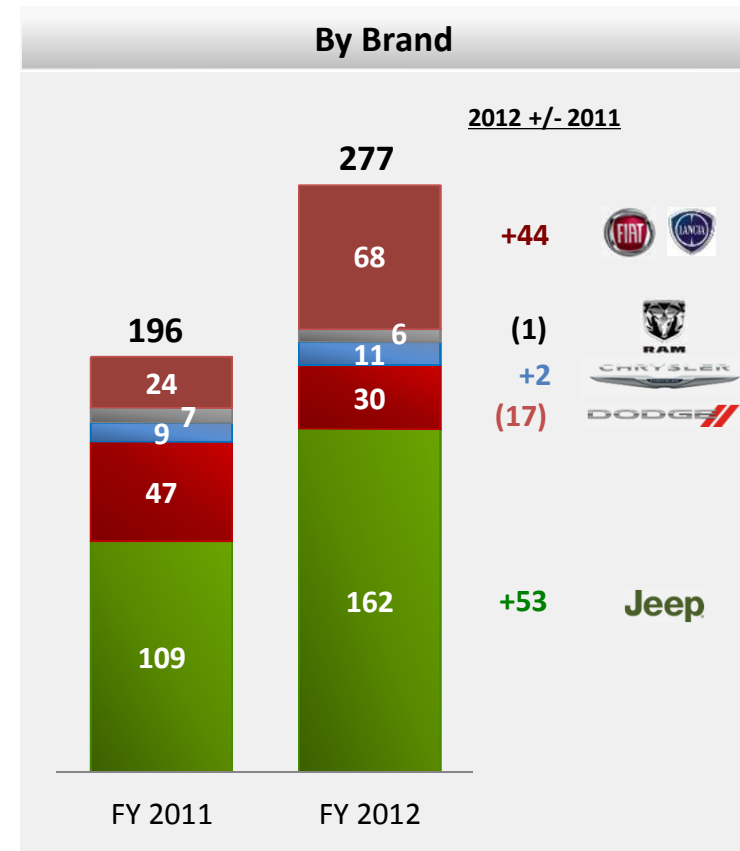


FY 2012 Sales Gains* (International Markets +41% Overall)



- EMEA – Italy, France, Germany, South Africa and Saudi Arabia continue to have gains, despite the negative economic environment in Europe
- Asia-Pacific – Strength in China and Australia (the two largest markets for Chrysler in Asia-Pacific)
- Latin America – Strength in Brazil and Argentina
- Jeep is Chrysler Group's top global brand

Total International Sales by Brand* (000's)



* Includes vehicles manufactured by Chrysler Group and sold by Fiat as Lancia and Fiat branded vehicles (23k in 2011 and 67k in 2012)

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Jeep Global Sales

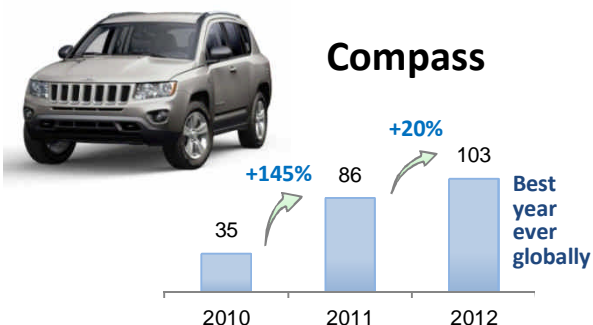
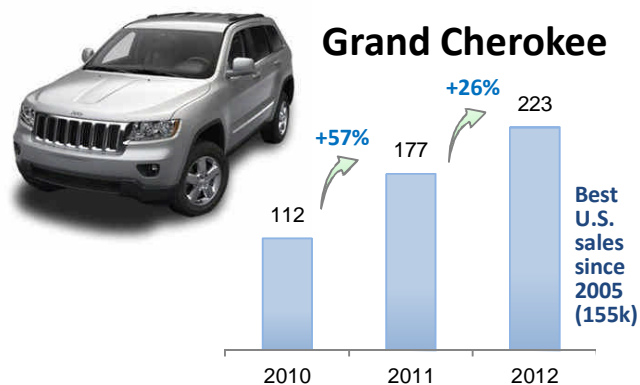
All-time record in 2012

Vehicles (000's)

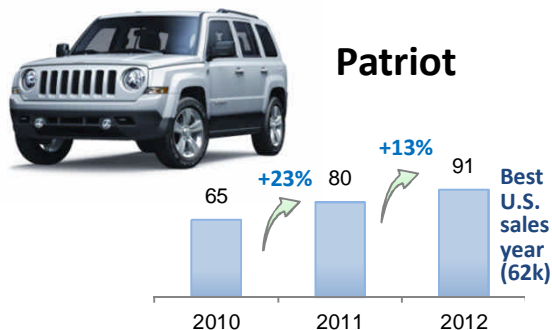
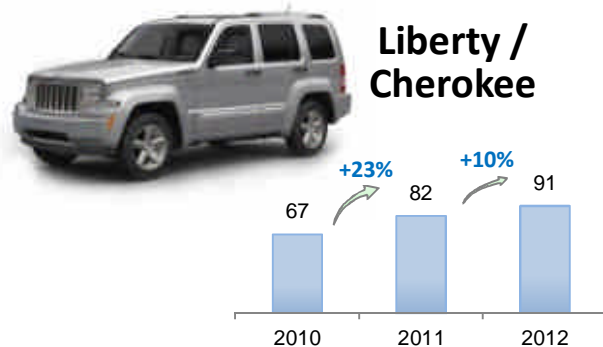
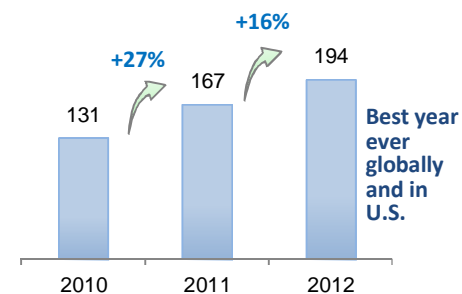


Jeep sets all-time global sales record in 2012

- Increased 19% over 2011 to 702k vehicles sold
- Previous record was 675k vehicles in 1999
- Increased sales for Jeep in all major global regions with a large increase in sales outside NAFTA



Wrangler / Wrangler Unlimited



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Ram Pick-Up / Dodge Dart Update



2013 RAM 1500 PICKUP

- **Best-in-class fuel economy** – 17 city/20 comb/25 hwy mpg with Pentastar 3.6L V6 4x2 and segment-exclusive TorqueFlite 8-speed transmission
- **Recent Key Awards**
 - *Motor Trend's* "Truck of the Year"
 - "2013 North American Truck/Utility of the Year"
 - *Detroit Free Press* "Truck of the Year"
 - AOL "Truck of the Year"
 - *Four Wheeler* "Pickup Truck of the Year"
 - TAWA – "Truck of Texas", "Full-Size Truck of Texas", "Luxury Pickup Truck of Texas"
 - *Consumer Guide Automotive* "Best Buy"

2013 RAM 2500/3500 (launching H1 2013)

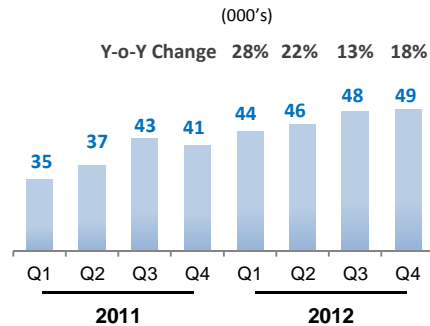
- **Ram 3500** Heavy Duty pickup maximum trailer weight best-in-class 30,000 lbs due to new high-strength steel, improved transfer case and higher-load transmission
- Gross Combined Weight Rating (GCWR) best-in-class 37,600 lbs
- 6.7-liter Cummins Turbo Diesel with best-in-class torque
- **Ram 2500** best-in-class towing and GCWR among ¾-ton pickups at 18,350 lbs and 25,000 lbs, respectively



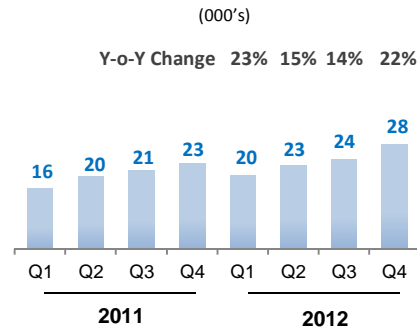
DODGE DART

- **Aero Model** – 41 MPG Highway
- **New 2013 Dodge Dart GT model**
 - 2.4L Tigershark MultiAir2 4-cylinder engine (184 hp; 174 lb.-ft torque)
 - Sport suspension with frequency-sensing damping shocks for improved ride and handling
 - Unique exterior and interior design

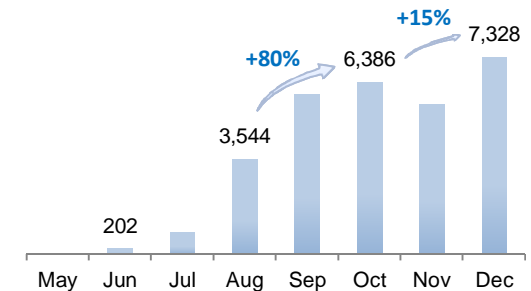
Ram 1500 U.S. Sales



Ram 2500/3500 U.S. Sales



2012 Sales Trend



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2014 MY Jeep at the North American International Auto Show



2014 JEEP GRAND CHEROKEE

- **New 3.0L EcoDiesel V-6 Engine** (240 horsepower; 420 lb-ft torque)
 - **Best-in-class 30 MPG,**
 - **Driving range more than 730 miles**
 - **Best-in-class towing of 7,400 lbs**
- New 8-speed automatic transmission
- More luxurious interior and new Summit model
- Three 4x4 systems, class-exclusive Quadra-Lift air suspension and class-leading Selec-Terrain traction management system
- **SRT model** – revised sport styling, improved towing capacity, and improved fuel economy with 8-speed transmission



2014 JEEP COMPASS / PATRIOT

- **New six-speed PowerTech automatic transmission**
- Fuel economy up to 30 MPG highway (2.0L World Gas Engine and manual transmission)
- Updated interior and exterior design on Compass
 - New standard front-seat-mounted side air bags
 - Available ParkView rear backup camera (Compass)
- Trail Rated 4x4 capability

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Chrysler Group 2013 Key Product Introductions

NAFTA



Jeep



**Jeep Grand Cherokee
Major Refresh**



Jeep D-SUV



**Ram 2500-3500 Pickup
Major Refresh**



**Ram ProMaster
commercial van**



Fiat 500L

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

2013 Guidance



	2012 Actual	2013 Guidance
Worldwide Vehicle Shipments	2.4 M	~2.6-2.7 M
Net Revenues	\$66 B	~\$72-75 B
Modified Operating Profit	\$2.9 B	~\$3.8 B
Net Income	\$1.7 B	~\$2.2 B
Free Cash Flow	\$2.2 B	≥\$1 B

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Chrysler Group Business Plan Update

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Business Plan Update

Product Plan - NAFTA



	2012	2013	2014	2015	2016
		 D-SUV COMPASS G.CHEROKEE		 	
	 RAM LD	 PROMASTER RAM HD CHASSIS CAB			
	 DART	 	 	 	
	 VIPER	 G. CHEROKEE	 		
	500 ABARTH 500 BEV	 500L		 	

Chrysler produced



new

refresh

FIAT produced



new

refresh

Change vs. 2009 Bus Plan



add



move x yrs



drop

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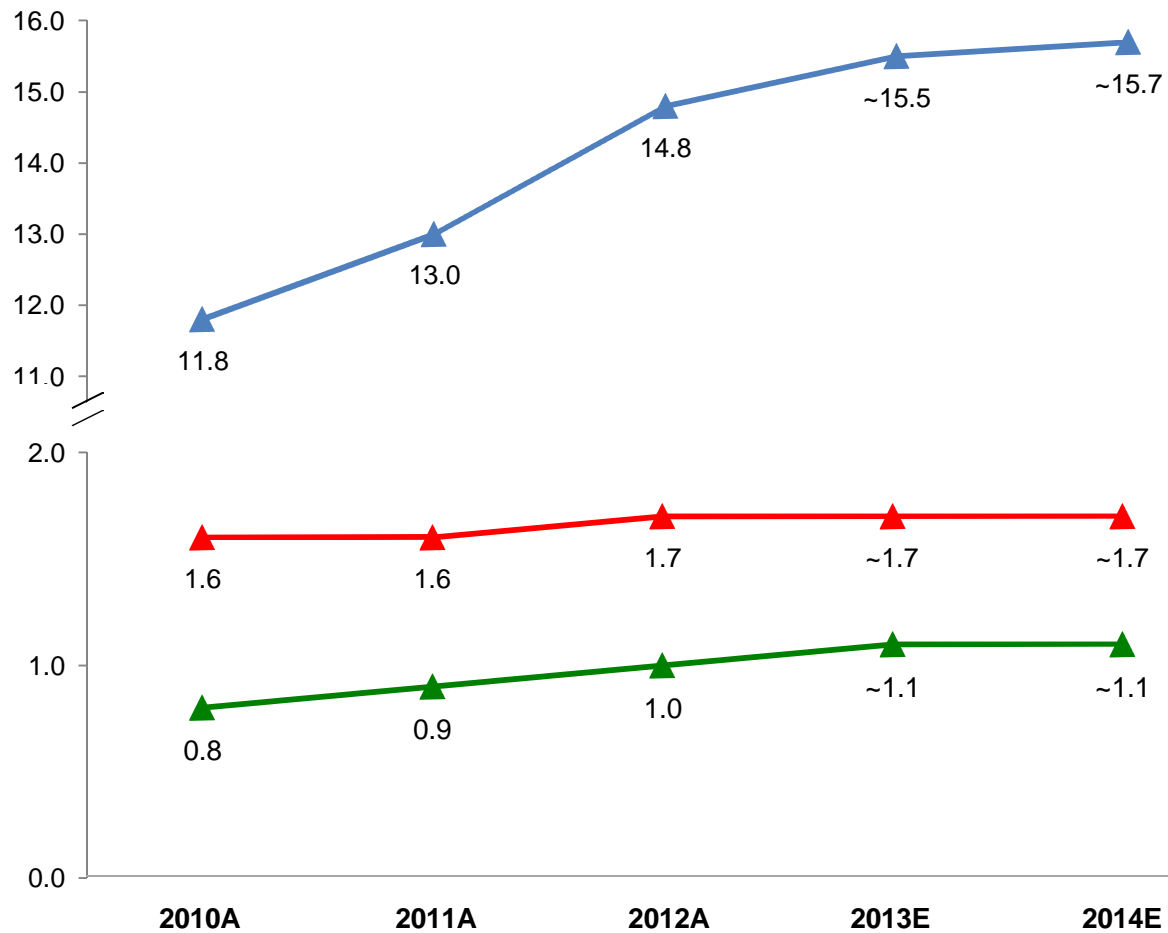
(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Business Plan Update

North American SAAR



Vehicles (Mils)



U.S. SAAR



Canada SAAR



Mexico SAAR



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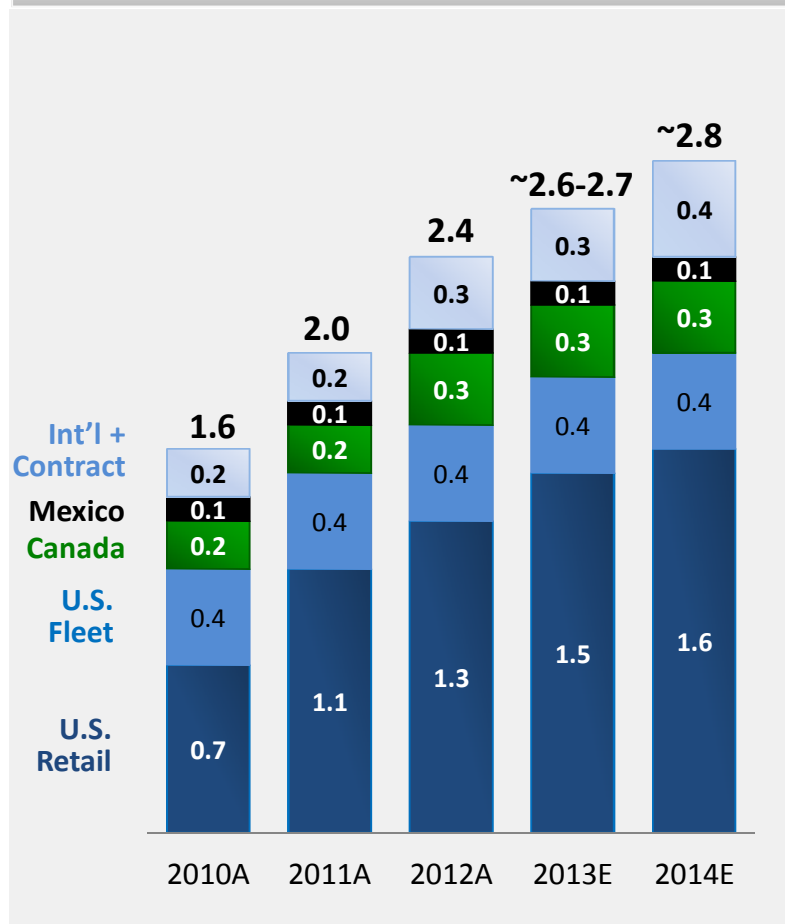
(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Business Plan Update

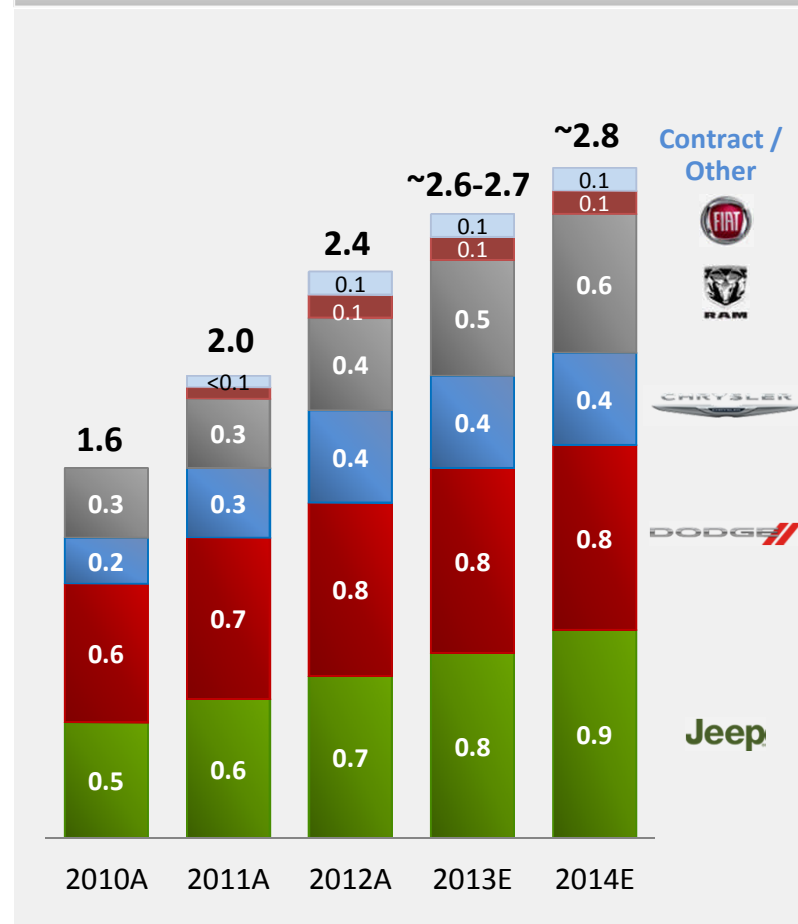
Worldwide Vehicle Shipments



By Market



By Brand



Note: Numbers may not add due to rounding

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Business Plan Update

Summary of Plan Targets



	2010 Actual	2011 Actual	2012 Actual	2013 Guidance	2014 Plan	
Worldwide Shipments	1.6M 1.6-1.7M	2.0M ~2.2M	2.4M ~2.4M	~2.6-2.7M ~2.6M	~2.8M ~2.8M	Nov. 2009 Plan
Net Revenue	\$42B ~\$42.5B	\$55B ~52.5B	\$66B ~57.5B	~\$72-75B ~62.5B	~\$80B \$67.5B	Nov. 2009 Plan
Modified Operating Profit / Margin	\$0.8B <u>1.8%</u> \$0.0-0.2B	\$2.0B <u>3.6%</u> \$1.6-2.4B	2.9B <u>4.4%</u> \$3.0-3.5B	~\$3.8B <u>~5.0%</u> \$3.8-4.4B	~\$4.8B <u>~6.0%</u> \$4.7-5.2B	Nov. 2009 Plan
Free Cash Flow	\$1.4B \$(1)B	\$1.9B \$1B	\$2.2B \$1B	≥\$1B \$1B	~\$1B \$3B	Nov. 2009 Plan

Performance through 2012 in line with the Plan, with cumulative Free Cash Flow generation \$4 billion better than Plan

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)



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Appendix

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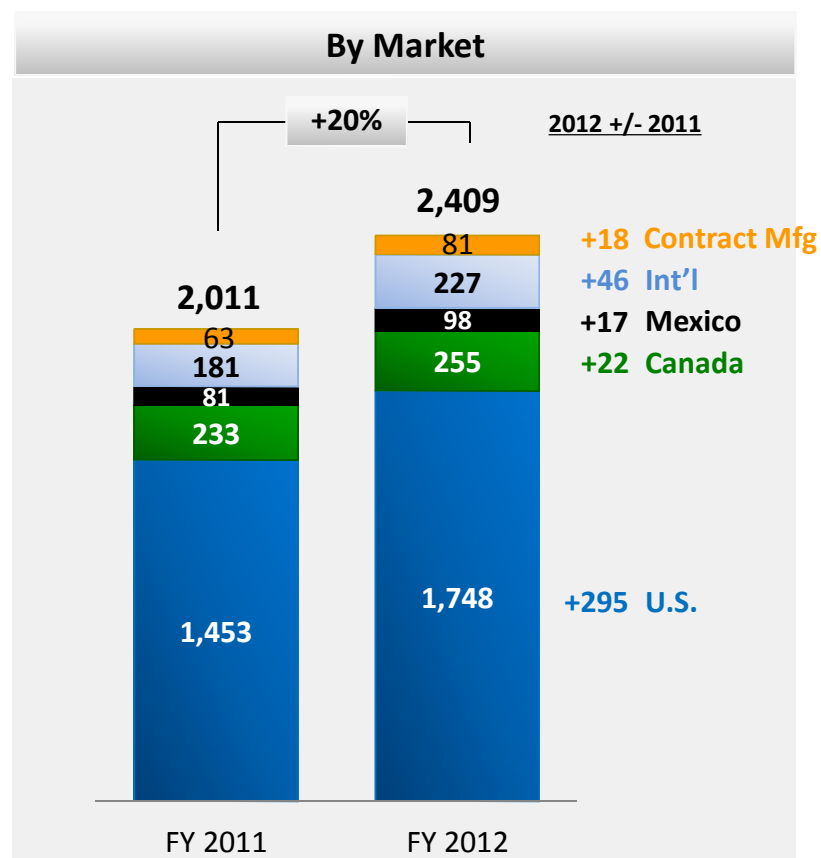
(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Worldwide Vehicle Shipments

FY 2012 versus FY 2011



Vehicles (000s)



- FY 2012 worldwide vehicle shipments totaled 2.4 million units, up 20% from FY 2011
- Q4 2012 worldwide vehicle shipments totaled 613k units, up 13% from 543k units in Q4 2011

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Guaranteed Depreciation Program Adjusted Shipments



Vehicles (000s)

	Q4 2012	Q4 2011	Q4 2012 B/(W) Q4 2011	FY 2012	FY 2011	FY 2012 B/(W) FY 2011
Worldwide Shipments	613	543	70	2,409	2,011	398
<u>Guaranteed Depreciation Program (GDP)</u>						
<i>Subtract:</i> Shipments during period	(7)	(5)	(2)	(51)	(76)	25
<i>Add:</i> Returns/auctions during period	17	22	(5)	74	58	16
Net (shipments) / returns	10	17	(7)	23	(18)	41
GDP Adjusted Worldwide Shipments	623	560	63	2,432	1,993	439

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Reconciliation of Worldwide Vehicle Sales to Shipments



Vehicles (000s)

	Q4 2012	Q4 2011	FY 2012	FY 2011
Worldwide Sales	533	479	2,194	1,855
Change in U.S. dealer inventory	58	49	101	90
Change in Canada dealer inventory	5	(13)	11	3
Contract manufacturing & other	17	28	103	63
Worldwide Shipments	613	543	2,409	2,011

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Q4 and Full Year Financial Results



\$ Millions

	Q4 2012	Q4 2011	Q4 2012 B/(W) Q4 2011	FY 2012	FY 2011	FY 2012 B/(W) FY 2011
Worldwide Vehicle Shipments (000) ¹	613	543	70	2,409	2,011	398
Net Revenue	17,152	15,129	2,023	65,784	54,981	10,803
Modified Operating Profit	711	508	203	2,912	1,975	937
% of Net Revenues	4.1%	3.4%	0.7 ppt	4.4%	3.6%	0.8 ppt
Modified EBITDA	1,337	1,171	166	5,450	4,754	696
% of Net Revenues	7.8%	7.7%	0.1 ppt	8.3%	8.6%	(0.3) ppt
Net Income	378	225	153	1,668	183	1,485
Adjusted Net Income ²	378	225	153	1,668	734	934
Free Cash Flow	(280)	(54)	(226)	2,221	1,947	274
Cash	11,614	9,601	2,013			
Gross Industrial Debt	(12,603)	(12,533)	(70)			
Net Industrial Debt	(989)	(2,932)	1,943			

¹ Before GDP adjustments (see details in Appendix)

² Excludes loss on extinguishment of debt of \$551 million in Q2 2011

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Reconciliation of Net Income to Adjusted Net Income, Modified Operating Profit and Modified EBITDA



<i>\$ Millions</i>	Q4 2012	Q4 2011	Q4 2012 B/(W) Q4 2011	FY 2012	FY 2011	FY 2012 B/(W) FY 2011
Net Income	378	225	153	1,668	183	1,485
Loss on Extinguishment of Debt	-	-	-	-	551	(551)
Adjusted Net Income	378	225	153	1,668	734	934
Income Tax Expense	80	50	30	274	198	76
Net Interest Expense	256	272	(16)	1,050	1,199	(149)
Other Employee Benefit Gains ¹	(2)	(38)	36	(34)	(170)	136
Restructuring (Income) Expenses, Net & Other	(1)	(1)	-	(46)	14	(60)
Modified Operating Profit	711	508	203	2,912	1,975	937
Depreciation and Amortization Expense ²	626	663	(37)	2,538	2,779	(241)
Modified EBITDA	1,337	1,171	166	5,450	4,754	696

¹ Includes interest cost, expected return on plan assets and amortization of unrecognized losses

² Excludes depreciation and amortization expense for vehicles held for lease

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Reconciliation of Net Cash Provided By (Used In) Operating and Investing Activities to Free Cash Flow



<i>\$ Millions</i>	Q4 2012	Q4 2011	Q4 2012 B/(W) Q4 2011	FY 2012	FY 2011	FY 2012 B/(W) FY 2011
Net Cash Provided By Operating Activities	344	1,066	(722)	5,821	4,603	1,218
Net Cash Used In Investing Activities	(623)	(1,096)	473	(3,557)	(1,970)	(1,587)
<i>Investing activities excluded from Free Cash Flow:</i>						
Change in Loans and Notes Receivables	(1)	(2)	1	(2)	(6)	4
Proceeds from USDART ¹	-	-	-	-	(96)	96
<i>Financing activities included in Free Cash Flow:</i>						
Repayments of Gold Key Lease Financing	-	(22)	22	(41)	(584)	543
Free Cash Flow	(280)	(54)	(226)	2,221	1,947	274

¹ U.S. Dealer Automotive Receivables Transition LLC

Reconciliation of Financial Liabilities to Gross Industrial Debt and Net Industrial Debt



\$ Millions

	Dec 31, 2012	Sept 30, 2012	Dec 31, 2011
Financial Liabilities (Carrying Value)	12,603	12,640	12,574
<i>Less:</i> Gold Key Lease obligations	-	-	(41)
Gross Industrial Debt	12,603	12,640	12,533
<i>Less:</i> Cash	(11,614)	(11,947)	(9,601)
Net Industrial Debt	989	693	2,932

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Gross Industrial Debt



\$ Billions	As of Dec 31, 2012	
	Carrying Value	Face Value
Term Loan B	2.9	3.0
Secured Senior Notes	3.2	3.2
VEBA Trust Note	4.3	4.9
Canadian Health Care Trust Notes	1.1	1.1
Mexican Development Banks Credit Facilities	0.6	0.6
Other Financial Liabilities	0.5	0.6
Gross Industrial Debt	12.6	13.3

Note: Numbers may not add due to rounding

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Gross Industrial Debt Maturity Schedule



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\$ Billions

Gross Industrial Debt

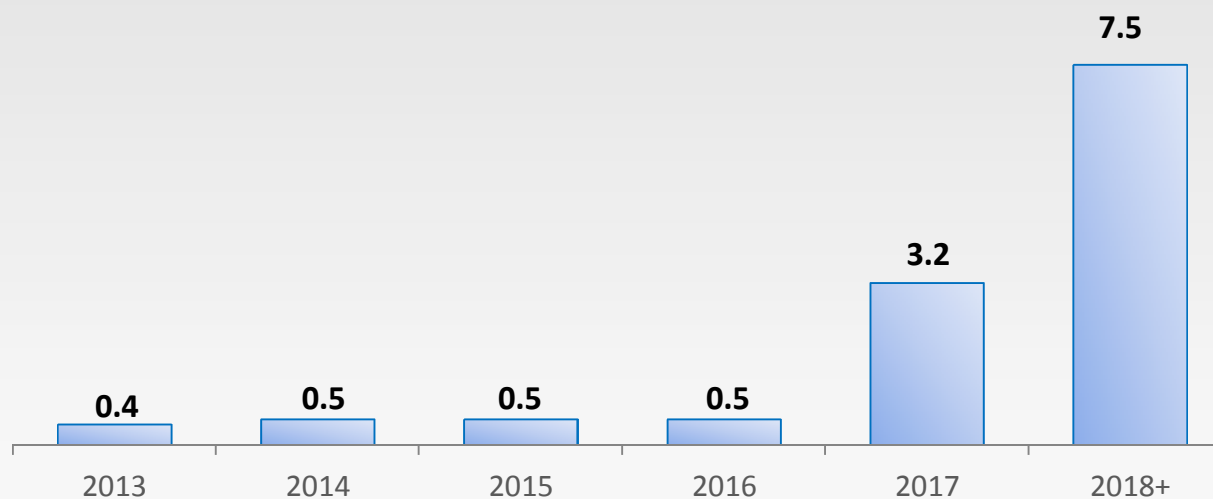
12.6



Dec 31, 2012
(Carrying Value)

Face Value
13.3

Annual Maturities



Note: Excluding accrued and accreted interest

0.5	0.5	0.5	0.5	3.4	7.9
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Note: Numbers may not add due to rounding

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Pension Disclosure



\$ Millions

	Q4 2012	Q4 2011	FY 2012	FY 2011
<u>NET PERIODIC PENSION COST</u>				
Service Cost	88	66	324	263
Interest Cost Net of Expected Return	(70)	(77)	(297)	(303)
Amortization of Unrecognized Loss	26	-	101	-
Special Early Retirement Costs	-	4	1	77
Total Net Periodic Pension Cost	44	(7)	129	37
<u>WORLDWIDE PENSION FUND CONTRIBUTIONS</u>				
	44	23	254	362
<u>FUNDED STATUS OF PLANS</u>				
U.S.			(7,669)	(5,374)
Non-U.S.			(1,196)	(1,162)
Total			(8,865)	(6,536)
<u>WORLDWIDE WEIGHTED AVERAGE ASSUMPTIONS</u>				
			<u>2012</u>	<u>2011</u>
Benefit Obligations at December 31:				
Discount Rate – Ongoing Benefits			3.98%	4.84%
Periodic Costs:				
Discount Rate – Ongoing Benefits			4.84%	5.33%
Expected Return on Plan Assets			7.41%	7.41%

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

OPEB Disclosure



\$ Millions

	Q4 2012	Q4 2011	FY 2012	FY 2011
<u>NET PERIODIC BENEFIT COST</u>				
Service Cost	5	5	24	21
Interest Cost	34	40	135	141
Amortization of Unrecognized Loss	7	5	26	13
Amortization of Prior Service Credit	(9)	(11)	(40)	(11)
Gain on VEBA Claims Adjustment	-	(6)	-	(21)
Other	-	4	-	4
Total Net Periodic Benefit Cost	37	37	145	147
<u>BENEFITS PAID</u>				
	47	49	189	217
<u>FUNDED STATUS OF PLANS</u>				
U.S.			(2,585)	(2,277)
Non-U.S.			<u>(488)</u>	<u>(452)</u>
Total			(3,073)	(2,729)
<u>WORLDWIDE WEIGHTED AVERAGE ASSUMPTIONS</u>				
			<u>2012</u>	<u>2011</u>
Benefit Obligations at December 31:				
Discount Rate – Ongoing Benefits			4.07%	4.93%
Periodic Costs:				
Discount Rate – Ongoing Benefits			4.93%	5.37%
Expected Return on Plan Assets			-	-

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(Preliminary results prepared in accordance with U.S. GAAP - Refer to Appendix for definitions of non-U.S. GAAP financial measures)

Non-U.S. GAAP Financial Information and Other Items



The following non-U.S. GAAP financial definitions apply when the presentation is referring to Adjusted Net Income, Modified Operating Profit, Modified EBITDA, Cash, Free Cash Flow and Gross and Net Industrial Debt

- (a) **Adjusted Net Income (Loss)** is defined as net income (loss) excluding the impact of infrequent charges, which includes losses on extinguishment of debt. The reconciliation of net income to Adjusted Net Income, Modified Operating Profit (defined below) and Modified EBITDA (defined below) for the three and twelve months ended December 31, 2012 and 2011 is detailed on page 36
- (b) **Modified Operating Profit (Loss)** is computed starting with net income (loss) and then adjusting the amount to (i) add back income tax expense and exclude income tax benefits, (ii) add back net interest expense (excluding interest expense related to financing activities associated with the vehicle lease portfolio the Company refers to as Gold Key Lease), (iii) add back (exclude) all pension, other postretirement benefit obligations ("OPEB") and other employee benefit costs (gains) other than service costs, (iv) add back restructuring expense and exclude restructuring income, (v) add back other financial expense, (vi) add back losses and exclude gains due to cumulative change in accounting principles, and (vii) add back certain other costs, charges and expenses, which include the charges factored into the calculation of Adjusted Net Income (Loss). The reconciliation of net income to Adjusted Net Income, Modified Operating Profit and Modified EBITDA (defined below) for the three and twelve months ended December 31, 2012 and 2011 is detailed on page 36
- (c) **Modified EBITDA** is computed starting with net income (loss) adjusted to Modified Operating Profit (Loss) as described above, and then add back depreciation and amortization expense (excluding depreciation and amortization expense for vehicles held for lease). The reconciliation of net income to Adjusted Net Income, Modified Operating Profit and Modified EBITDA for the three and twelve months ended December 31, 2012 and 2011 is detailed on page 36
- (d) **Cash** is defined as cash and cash equivalents
- (e) **Free Cash Flow** is defined as cash flows from operating and investing activities, excluding any debt-related investing activities, adjusted for financing activities related to Gold Key Lease. A reconciliation of net cash provided by (used in) operating and investing activities to Free Cash Flow for the three and twelve months ended December 31, 2012 and 2011 is detailed on page 37
- (f) A reconciliation of financial liabilities to **Gross Industrial Debt** and **Net Industrial Debt** at December 31, 2012, September 30, 2012 and December 31, 2011 is detailed on page 38

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