

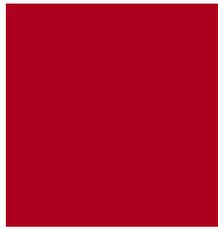


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HIGHLIGHTS





Highlights

■ Change in net sales

- Positive total growth: +1.4%
- Acquisition-driven growth
- Good relative performances in new economies and the USA
- Still difficult market conditions in other mature markets

■ Profitability and free cash flow

- Adjusted operating margin: 20.7% excluding acquisitions (20.3% including acquisitions)
- Normalized⁽¹⁾ free cash flow as % of sales: 14.1%

■ 2013 targets confirmed⁽²⁾

1. Based on a constant 10% ratio of total working capital requirement to sales, at constant scope of consolidation and exchange rates

2. Based on first-half achievements and in an industry structured with no order book

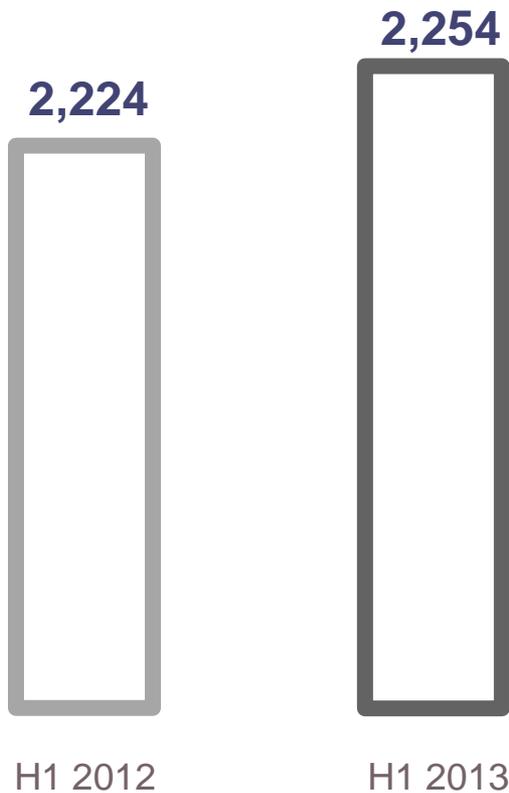


SOLID H1 2013
PERFORMANCES
AND 2013 TARGETS
CONFIRMED



H1 2013 Change in Net Sales (1/2) By Region

€ millions



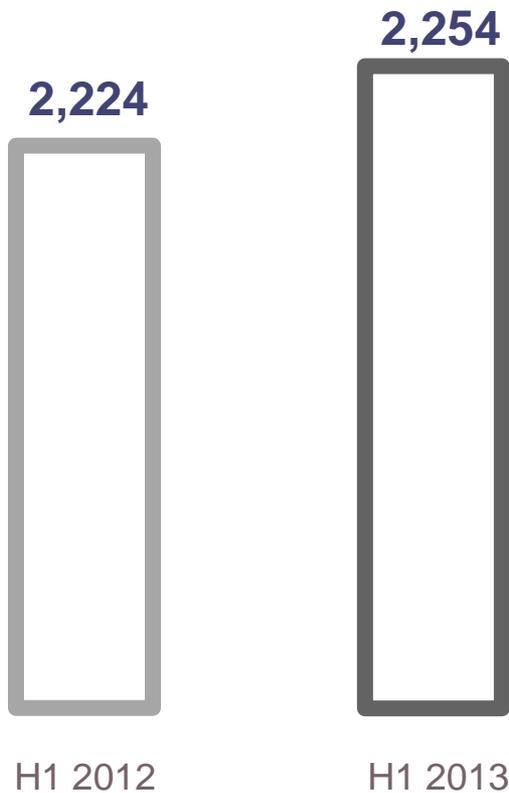
Total growth: +1.4%

- New economies: +9.4%
- USA / Canada: +8.2%
- Other mature markets: -6.8%



H1 2013 Change in Net Sales (2/2) By Components

€ millions



Total growth: +1.4%

- External growth: +2.9%
- Exchange rate effect: -1.2%
- Organic⁽¹⁾ growth: -0.2%

1. Organic: at constant scope of consolidation and exchange rates

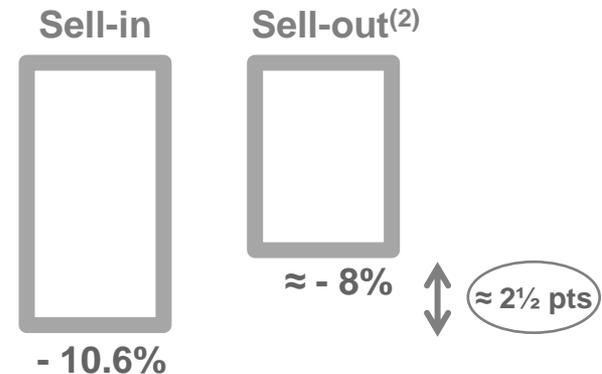
H1 2013 Organic⁽¹⁾ Change in Net Sales by Geographical Region (1/2)

France

- -5.1% organic⁽¹⁾ growth reflecting market trends
- In this context, good performances in home systems and door-entry systems
- Successful launch of Drivia in Q1

Italy

- -10.6% organic⁽¹⁾ growth
- Sell-out % better than sell-in %



- In still difficult market conditions, Legrand continues to benefit from its robust leadership positions, such as in wiring devices, door-entry systems and home systems

1. Organic: at constant scope of consolidation and exchange rates

2. Estimates



H1 2013 Organic⁽¹⁾ Change in Net Sales by Geographical Region (2/2)

Rest of Europe

- -2.3% organic⁽¹⁾ growth
- Good performances in Eastern Europe, in particular in Russia, Hungary and Romania, partially offset the decline in mature countries
- Better performance in Q2 compared to Q1 in some countries, in particular in Northern Europe

USA/Canada

- +8.0% organic⁽¹⁾ growth
- Pursuing sales development with new retailers that began in H2 2012
- Buoyant and solid momentum in the residential segment
- Non-residential market has not yet recovered, but positive performance of Legrand in this segment

Rest of the world

- +4.7% organic⁽¹⁾ growth
- Good showings, notably in:
 - ✓ Asia, particularly China and India
 - ✓ Africa/Middle East including Saudi Arabia and North Africa



Adjusted⁽¹⁾ Operating Margin

H1 2012	adjusted operating margin	20.5%
	Like-for-like performance	+20bps
	✓ Overall inflation covered by pricing management	
	✓ Investments targeting growth in expanding markets	
	✓ Adaptation in countries affected by unfavorable economic conditions	
H1 2013	adjusted operating margin before acquisitions	20.7%
	Acquisition impact	-40bps
H1 2013	adjusted operating margin	20.3%

1. Operating income adjusted for amortization of revaluation of intangible assets at the time of acquisitions and for expense/income, relating to acquisitions (€12.2 million in H1 2012 and €15.4 million in H1 2013) and, where applicable, for impairment of goodwill (€0 in H1 2012 and H1 2013)



Free Cash Flow Generation in H1 2013

- Robust cash flow from operations: €367m, i.e., 16.3% of sales
- Capital employed under control
 - Improvement of operating⁽¹⁾ working capital requirement as % of sales: -60bps over one year
 - Capex: 2.4% of sales

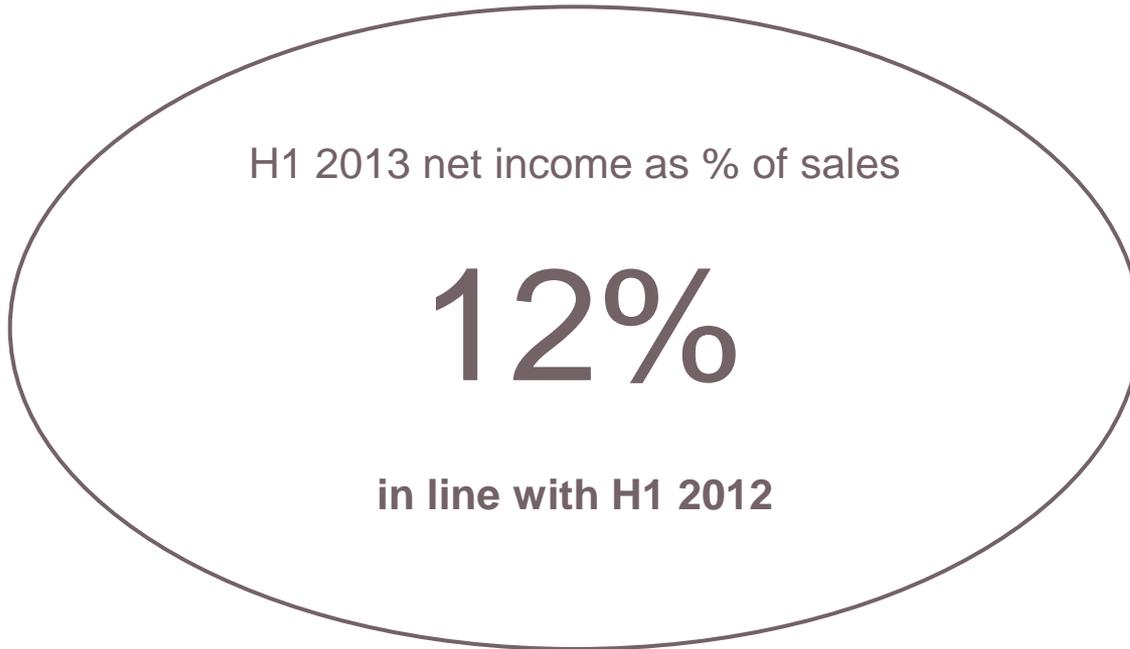


1. *Inventories + trade receivables – trade payables*

2. *Based on a constant 10% ratio of total working capital requirement to sales, at constant scope of consolidation and exchange rates
Normalized free cash flow expected between 12% and 13% of sales for 2013 full year*



Net Income⁽¹⁾



1. Excluding minorities

2013 Targets Confirmed

Based on first-half achievements and in an industry structured with no order book, Legrand confirms its 2013 targets for:

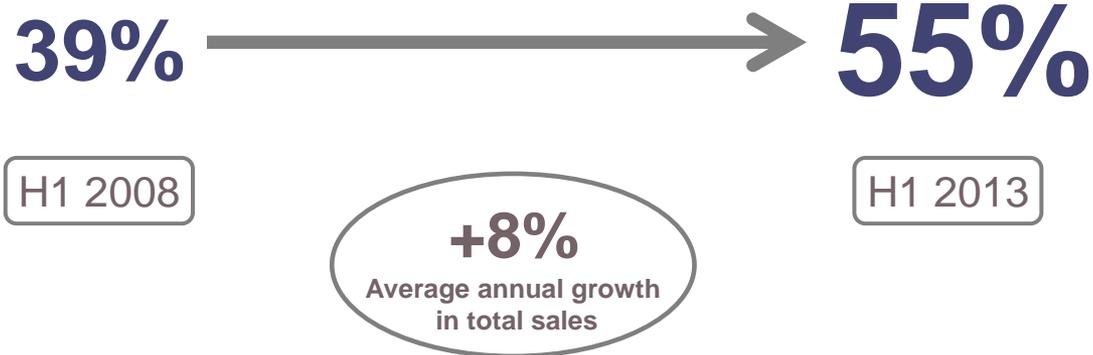
- organic⁽¹⁾ growth in sales at between -2% and +2% and
- adjusted operating margin before acquisitions at between 19% and 20% of sales



COMMERCIAL
POSITIONS IN
GROWING MARKETS
STRENGTHENED

Structural Improvement of Legrand's Growth Profile - Shifting Towards Buoyant Markets

Sales in the **USA/Canada** region and **New Economies**
as % of total group sales



COMMERCIAL
POSITIONS IN
GROWING MARKETS
STRENGTHENED

Ongoing Reinforcement of Market Positions Innovation and Numerous New-Product Launches (1/2)

4.7%

of sales invested
in R&D

50%

of investment dedicated to
new products

Close to **2100**

people in R&D



**Numerous
new-product
launches**

Ongoing Reinforcement of Market Positions Innovation and Numerous New-Product Launches (2/2)

New business segments

Mature economies



New Touch Screen 10"
MyHome
(Worldwide)



New PDU
(Worldwide)



Fasclic Auto
Wiremesh
(Worldwide)

New economies



Linkeo
VDI enclosures
(Worldwide)



Intersoc-R
Power desk modules
(Worldwide)

Key historic segments



Drivia
Distribution boards
(France)



Kickspot
Emergency lighting
(France)



TX3
Miniature circuit breakers
(China, Russia)



Ysalis and Silkia
Wiring devices
(China)



COMMERCIAL
POSITIONS IN
GROWING MARKETS
STRENGTHENED

Ongoing Reinforcement of Market Positions External Growth (1/2)

3 acquisitions announced⁽¹⁾ so far in 2013

- Self financed
- Small to mid-size and bolt-on
- Leading positions or proven technological expertise
- New business segments or new economies
- Comprehensive docking process

1. *Seico, S2S Onduleurs and Adlec Power (joint venture)*

COMMERCIAL
POSITIONS IN
GROWING MARKETS
STRENGTHENED

Ongoing Reinforcement of Market Positions External Growth (2/2)



#1 in industrial metal cable trays

Saudi Arabia

Annual sales of €23m



Specialist in UPS

France

€20m



(1)

A key player in distribution boards

India

€23m

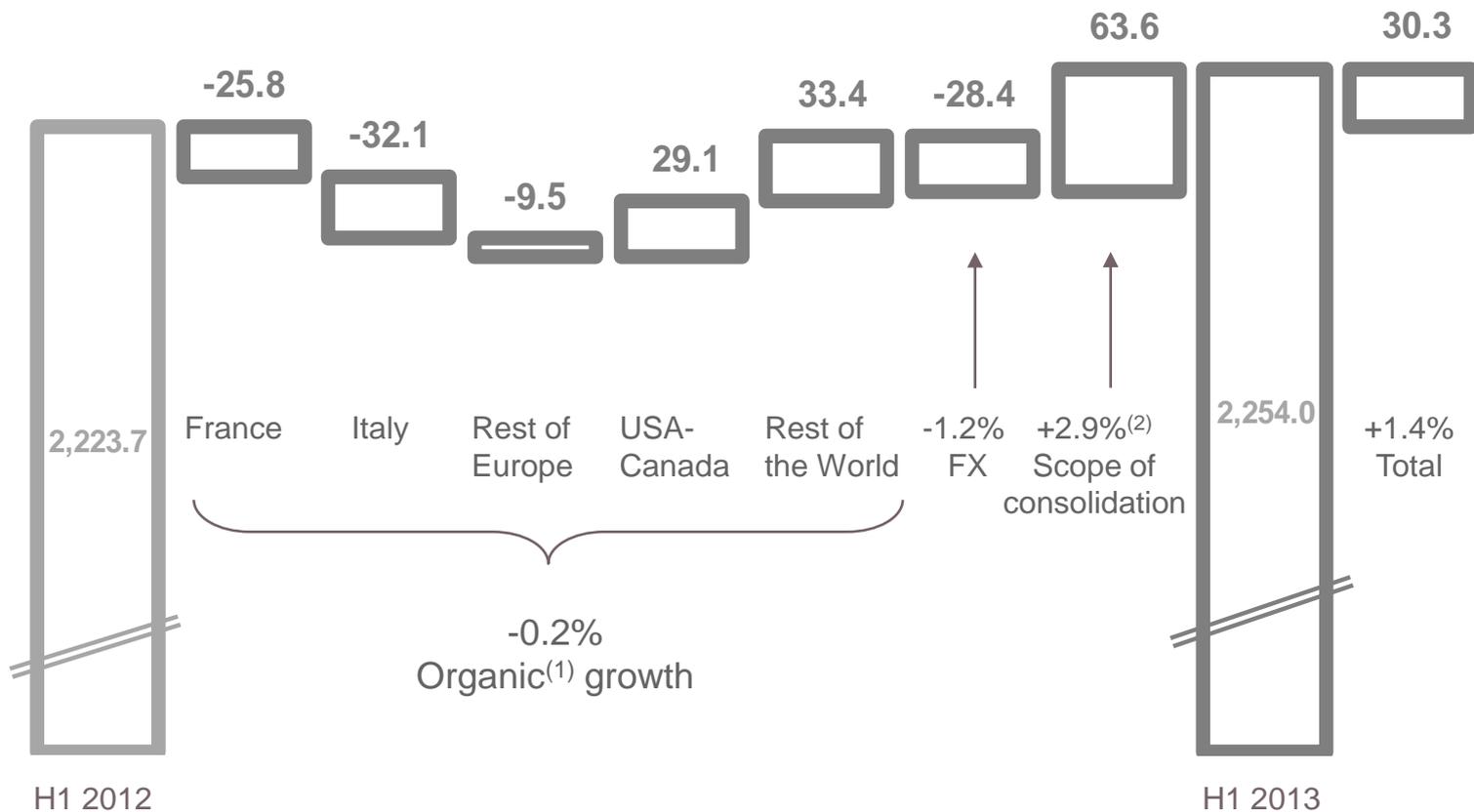
aspire.ascertain.accomplish.



APPENDICES

Change in Net Sales

Breakdown of change in 2013 first-half net sales by destination (€m)



1. Organic: at constant scope of consolidation and exchange rates
 2. Due to the consolidation of Aegide, Numeric UPS, NuVo Technologies, Daneva and Seico

2013 First Half – Net Sales by Destination⁽¹⁾

In € millions	H1 2012	H1 2013	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
France	506.8	481.7	-5.0%	0.1%	-5.1%	0.0%
Italy	302.5	270.4	-10.6%	0.0%	-10.6%	0.0%
Rest of Europe	401.3	394.3	-1.7%	1.7%	-2.3%	-1.1%
USA/Canada	356.2	385.5	8.2%	1.4%	8.0%	-1.2%
Rest of the World	656.9	722.1	9.9%	7.8%	4.7%	-2.6%
Total	2,223.7	2,254.0	1.4%	2.9%	-0.2%	-1.2%

1. Market where sales are recorded

2013 First Quarter – Net Sales by Destination⁽¹⁾

In € millions	Q1 2012	Q1 2013	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
France	251.3	241.7	-3.8%	0.5%	-4.3%	0.0%
Italy	154.3	142.0	-8.0%	0.0%	-8.0%	0.0%
Rest of Europe	193.9	191.7	-1.1%	4.7%	-5.1%	-0.5%
USA/Canada	168.9	181.6	7.5%	1.4%	6.7%	-0.6%
Rest of the World	317.8	335.9	5.7%	5.2%	4.5%	-3.9%
Total	1,086.2	1,092.9	0.6%	2.7%	-0.6%	-1.4%

1. Market where sales are recorded

2013 Second Quarter – Net Sales by Destination⁽¹⁾

In € millions	Q2 2012	Q2 2013	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
France	255.5	240.1	-6.0%	-0.2%	-5.9%	0.0%
Italy	148.2	128.4	-13.4%	0.0%	-13.4%	0.0%
Rest of Europe	207.4	202.5	-2.4%	-1.1%	0.4%	-1.7%
USA/Canada	187.3	203.9	8.9%	1.3%	9.3%	-1.7%
Rest of the World	339.1	386.2	13.9%	10.2%	4.9%	-1.4%
Total	1,137.5	1,161.1	2.1%	3.0%	0.2%	-1.1%

1. Market where sales are recorded

2013 First Half – Net Sales by Origin⁽¹⁾

In € millions	H1 2012	H1 2013	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
France	565.5	539.9	-4.5%	0.0%	-4.5%	0.0%
Italy	316.8	289.1	-8.7%	0.0%	-8.7%	0.0%
Rest of Europe	394.3	384.8	-2.4%	1.6%	-2.8%	-1.1%
USA/Canada	362.4	392.5	8.3%	1.8%	7.7%	-1.2%
Rest of the World	584.7	647.7	10.8%	8.7%	4.9%	-2.9%
Total	2,223.7	2,254.0	1.4%	2.9%	-0.2%	-1.2%

1. Zone of origin of the product sold

2013 First Quarter – Net Sales by Origin⁽¹⁾

In € millions	Q1 2012	Q1 2013	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
France	280.2	268.7	-4.1%	0.0%	-4.1%	0.0%
Italy	160.6	151.7	-5.5%	0.0%	-5.5%	0.0%
Rest of Europe	189.4	187.5	-1.0%	5.2%	-5.4%	-0.5%
USA/Canada	172.5	185.0	7.2%	1.7%	6.1%	-0.6%
Rest of the World	283.5	300.0	5.8%	5.8%	4.5%	-4.3%
Total	1,086.2	1,092.9	0.6%	2.7%	-0.6%	-1.4%

1. Zone of origin of the product sold

2013 Second Quarter – Net Sales by Origin⁽¹⁾

In € millions	Q2 2012	Q2 2013	Total Change	Scope of Consolidation	Like-for-Like Growth	Currency Effect
France	285.3	271.2	-4.9%	0.0%	-4.9%	0.0%
Italy	156.2	137.4	-12.0%	0.0%	-12.0%	0.0%
Rest of Europe	204.9	197.3	-3.7%	-1.8%	-0.2%	-1.7%
USA/Canada	189.9	207.5	9.3%	2.0%	9.0%	-1.7%
Rest of the World	301.2	347.7	15.4%	11.4%	5.3%	-1.6%
Total	1,137.5	1,161.1	2.1%	3.0%	0.2%	-1.1%

1. Zone of origin of the product sold

2013 First Half – P&L

In € millions	H1 2012	H1 2013	% change
Net sales	2,223.7	2,254.0	+1.4%
Gross profit	1,172.4	1,175.5	+0.3%
<i>as % of sales</i>	52.7%	52.2%	
Adjusted⁽¹⁾ operating profit	456.5	457.5	+0.2%
<i>as % of sales</i>	20.5%	20.3% ⁽²⁾	
Amortization and expense/income related to acquisitions	(12.2)	(15.4)	
Operating profit	444.3	442.1	-0.5%
<i>as % of sales</i>	20.0%	19.6%	
Financial income (costs)	(40.5)	(39.6)	
Exchange gains (losses)	(10.6)	(6.1)	
Income-tax expense	(123.8)	(125.2)	
Profit	269.4	271.2	+0.7%
Profit excluding minority interests	268.7	269.8	+0.4%

1. Operating income adjusted for amortization of revaluation of intangible assets at the time of acquisitions and for expense/income, relating to acquisitions (€12.2 million in H1 2012 and €15.4 million in H1 2013) and, where applicable, for impairment of goodwill (€0 in H1 2012 and H1 2013)
2. 20.7% excluding acquisitions

2013 First Quarter – P&L

In € millions	Q1 2012	Q1 2013	% change
Net sales	1,086.2	1,092.9	+0.6%
Gross profit	576.9	567.4	-1.6%
<i>as % of sales</i>	53.1%	51.9%	
Adjusted⁽¹⁾ operating profit	221.9	216.1	-2.6%
<i>as % of sales</i>	20.4%	19.8%⁽²⁾	
Amortization and expense/income related to acquisitions	(6.0)	(7.5)	
Operating profit	215.9	208.6	-3.4%
<i>as % of sales</i>	19.9%	19.1%	
Financial income (costs)	(20.3)	(19.8)	
Exchange gains (losses)	(5.1)	(3.9)	
Income-tax expense	(66.5)	(60.1)	
Profit	124.0	124.8	+0.6%
Profit excluding minority interests	123.3	124.5	+1.0%

1. Operating income adjusted for amortization of revaluation of intangible assets at the time of acquisitions and for expense/income, relating to acquisitions (€6.0 million in Q1 2012 and €7.5 million in Q1 2013) and, where applicable, for impairment of goodwill (€0 in Q1 2012 and Q1 2013)
2. 20.2% excluding acquisitions

2013 Second Quarter – P&L

In € millions	Q2 2012	Q2 2013	% change
Net sales	1,137.5	1,161.1	+2.1%
Gross profit	595.5	608.1	+2.1%
<i>as % of sales</i>	52.4%	52.4%	
Adjusted⁽¹⁾ operating profit	234.6	241.4	+2.9%
<i>as % of sales</i>	20.6%	20.8%⁽²⁾	
Amortization and expense/income related to acquisitions	(6.2)	(7.9)	
Operating profit	228.4	233.5	+2.2%
<i>as % of sales</i>	20.1%	20.1%	
Financial income (costs)	(20.2)	(19.8)	
Exchange gains (losses)	(5.5)	(2.2)	
Income-tax expense	(57.3)	(65.1)	
Profit	145.4	146.4	+0.7%
Profit excluding minority interests	145.4	145.3	-0.1%

1. Operating income adjusted for amortization of revaluation of intangible assets at the time of acquisitions and for expense/income, relating to acquisitions (€6.2 million in Q2 2012 and €7.9 million in Q2 2013) and, where applicable, for impairment of goodwill (€0 in Q1 2012 and Q1 2013)
2. 21.2% excluding acquisitions

2013 First Half – Adjusted Operating Profit Before and After Other Operating Income (Expense) by Geographical Region

H1 2013 (in € millions)	France	Italy	Rest of Europe	USA/ Canada	Rest of the World	Total
Net sales	539.9	289.1	384.8	392.5	647.7	2,254.0
Cost of sales	(195.2)	(100.5)	(222.9)	(195.0)	(364.9)	(1,078.5)
Administrative and selling expenses, R&D costs	(205.5)	(86.6)	(100.5)	(134.7)	(174.2)	(701.5)
Reversal of acquisition-related amortization, expense and income accounted for in administrative and selling expenses, R&D costs	(2.3)	0.0	(1.4)	(5.0)	(6.7)	(15.4)
Adjusted operating profit before other operating income (expense)	141.5	102.0	62.8	67.8	115.3	489.4
as % of sales	26.2%	35.3%	16.3%	17.3%	17.8%	21.7%
Other operating income (expense)	(8.3)	(2.8)	(3.3)	(6.7)	(10.8)	(31.9) ⁽¹⁾
Reversal of acquisition-related amortization, expense and income accounted for in other operating income (expense)	0.0	0.0	0.0	0.0	0.0	0.0
Adjusted operating profit	133.2	99.2	59.5	61.1	104.5	457.5
as % of sales	24.7%	34.3%	15.5%	15.6%	16.1%	20.3%

1. Restructuring (€8.9m) and other miscellaneous items (€23.0m)

2012 First Half – Adjusted Operating Profit Before and After Other Operating Income (Expense) by Geographical Region

H1 2012 (in € millions)	France	Italy	Rest of Europe	USA/ Canada	Rest of the World	Total
Net sales	565.5	316.8	394.3	362.4	584.7	2,223.7
Cost of sales	(203.8)	(122.1)	(231.0)	(172.0)	(322.4)	(1,051.3)
Administrative and selling expenses, R&D costs	(213.5)	(90.3)	(102.6)	(133.5)	(161.0)	(700.9)
Reversal of acquisition-related amortization, expense and income accounted for in administrative and selling expenses, R&D costs	(1.8)	0.0	(1.6)	(5.1)	(3.7)	(12.2)
Adjusted operating profit before other operating income (expense)	150.0	104.4	62.3	62.0	105.0	483.7
as % of sales	26.5%	33.0%	15.8%	17.1%	18.0%	21.8%
Other operating income (expense)	(6.9)	(4.9)	(12.1)	(9.6)	6.3	(27.2) ⁽¹⁾
Reversal of acquisition-related amortization, expense and income accounted for in other operating income (expense)	0.0	0.0	0.0	0.0	0.0	0.0
Adjusted operating profit	143.1	99.5	50.2	52.4	111.3	456.5
as % of sales	25.3%	31.4%	12.7%	14.5%	19.0%	20.5%

1. Restructuring (€4.6m) and other miscellaneous items (€22.6m)

2013 First Quarter – Adjusted Operating Profit Before and After Other Operating Income (Expense) by Geographical Region

Q1 2013 (in € millions)	France	Italy	Rest of Europe	USA/ Canada	Rest of the World	Total
Net sales	268.7	151.7	187.5	185.0	300.0	1,092.9
Cost of sales	(97.8)	(54.3)	(108.9)	(93.3)	(171.2)	(525.5)
Administrative and selling expenses, R&D costs	(104.4)	(44.6)	(50.7)	(65.6)	(83.2)	(348.5)
Reversal of acquisition-related amortization, expense and income accounted for in administrative and selling expenses, R&D costs	(0.9)	0.0	(0.9)	(2.4)	(3.3)	(7.5)
Adjusted operating profit before other operating income (expense)	67.4	52.8	28.8	28.5	48.9	226.4
as % of sales	25.1%	34.8%	15.4%	15.4%	16.3%	20.7%
Other operating income (expense)	(4.5)	0.2	(1.6)	(0.4)	(4.0)	(10.3) ⁽¹⁾
Reversal of acquisition-related amortization, expense and income accounted for in other operating income (expense)	0.0	0.0	0.0	0.0	0.0	0.0
Adjusted operating profit	62.9	53.0	27.2	28.1	44.9	216.1
as % of sales	23.4%	34.9%	14.5%	15.2%	15.0%	19.8%

1. Restructuring (€3.9m) and other miscellaneous items (€6.4m)

2012 First Quarter – Adjusted Operating Profit Before and After Other Operating Income (Expense) by Geographical Region

Q1 2012 (in € millions)	France	Italy	Rest of Europe	USA/ Canada	Rest of the World	Total
Net sales	280.2	160.6	189.4	172.5	283.5	1,086.2
Cost of sales	(98.0)	(60.5)	(111.4)	(82.2)	(157.2)	(509.3)
Administrative and selling expenses, R&D costs	(112.4)	(46.3)	(50.5)	(64.3)	(78.9)	(352.4)
Reversal of acquisition-related amortization, expense and income accounted for in administrative and selling expenses, R&D costs	(1.0)	0.0	(1.1)	(2.0)	(1.9)	(6.0)
Adjusted operating profit before other operating income (expense)	70.8	53.8	28.6	28.0	49.3	230.5
as % of sales	25.3%	33.5%	15.1%	16.2%	17.4%	21.2%
Other operating income (expense)	(3.6)	(0.1)	(1.5)	0.2	(3.6)	(8.6) ⁽¹⁾
Reversal of acquisition-related amortization, expense and income accounted for in other operating income (expense)	0.0	0.0	0.0	0.0	0.0	0.0
Adjusted operating profit	67.2	53.7	27.1	28.2	45.7	221.9
as % of sales	24.0%	33.4%	14.3%	16.3%	16.1%	20.4%

1. Restructuring (€2.6m) and other miscellaneous items (€6.0m)

2013 Second Quarter – Adjusted Operating Profit Before and After Other Operating Income (Expense) by Geographical Region

Q2 2013 (in € millions)	France	Italy	Rest of Europe	USA/ Canada	Rest of the World	Total
Net sales	271.2	137.4	197.3	207.5	347.7	1,161.1
Cost of sales	(97.4)	(46.2)	(114.0)	(101.7)	(193.7)	(553.0)
Administrative and selling expenses, R&D costs	(101.1)	(42.0)	(49.8)	(69.1)	(91.0)	(353.0)
Reversal of acquisition-related amortization, expense and income accounted for in administrative and selling expenses, R&D costs	(1.4)	0.0	(0.5)	(2.6)	(3.4)	(7.9)
Adjusted operating profit before other operating income (expense)	74.1	49.2	34.0	39.3	66.4	263.0
as % of sales	27.3%	35.8%	17.2%	18.9%	19.1%	22.7%
Other operating income (expense)	(3.8)	(3.0)	(1.7)	(6.3)	(6.8)	(21.6) ⁽¹⁾
Reversal of acquisition-related amortization, expense and income accounted for in other operating income (expense)	0.0	0.0	0.0	0.0	0.0	0.0
Adjusted operating profit	70.3	46.2	32.3	33.0	59.6	241.4
as % of sales	25.9%	33.6%	16.4%	15.9%	17.1%	20.8%

1. Restructuring (€5.0m) and other miscellaneous items (€16.6m)

2012 Second Quarter – Adjusted Operating Profit Before and After Other Operating Income (Expense) by Geographical Region

Q2 2012 (in € millions)	France	Italy	Rest of Europe	USA/ Canada	Rest of the World	Total
Net sales	285.3	156.2	204.9	189.9	301.2	1,137.5
Cost of sales	(105.8)	(61.6)	(119.6)	(89.8)	(165.2)	(542.0)
Administrative and selling expenses, R&D costs	(101.1)	(44.0)	(52.1)	(69.2)	(82.1)	(348.5)
Reversal of acquisition-related amortization, expense and income accounted for in administrative and selling expenses, R&D costs	(0.8)	0.0	(0.5)	(3.1)	(1.8)	(6.2)
Adjusted operating profit before other operating income (expense)	79.2	50.6	33.7	34.0	55.7	253.2
as % of sales	27.8%	32.4%	16.4%	17.9%	18.5%	22.3%
Other operating income (expense)	(3.3)	(4.8)	(10.6)	(9.8)	9.9	(18.6) ⁽¹⁾
Reversal of acquisition-related amortization, expense and income accounted for in other operating income (expense)	0.0	0.0	0.0	0.0	0.0	0.0
Adjusted operating profit	75.9	45.8	23.1	24.2	65.6	234.6
as % of sales	26.6%	29.3%	11.3%	12.7%	21.8%	20.6%

1. Restructuring (€2.0m) and other miscellaneous items (€16.6m)

2013 First Half – Reconciliation of Cash Flow From Operations with Profit

In € millions	H1 2012	H1 2013
Profit	269.4	271.2
Depreciation & amortization	79.5	83.5
Change in other non-current assets and liabilities and deferred tax	7.8	8.8
Exchange (gains)/losses net	6.3	5.3
(Gains)/losses on sales of assets, net	(3.5)	(2.2)
Other adjustments	0.6	0.1
Cash flow from operations	360.1	366.7

2013 First Half – Reconciliation of Free Cash Flow with Cash Flow From Operations

In € millions	H1 2012	H1 2013
Cash flow from operations ⁽¹⁾	360.1	366.7
<i>as % of sales</i>	16.2%	16.3%
Change in working capital requirement	(101.1)	(151.3)
Net cash provided by operating activities	259.0	215.4
<i>as % of sales</i>	11.6%	9.6%
Capital expenditures (including capitalized R&D)	(48.3)	(53.7)
Net proceeds of sales of fixed assets	5.5	3.0
Free cash flow	216.2	164.7
<i>as % of sales</i>	9.7%	7.3%

1. Cash flow from operations is defined as the sum of net cash of operating activities and change in working capital requirement

Scope of Consolidation

2012	Q1	H1	9M	FY
Aegide	Balance sheet only	4 months	7 months	10 months
Numeric UPS		Balance sheet only	4 months	7 months
NuVo				Balance sheet only

2013	Q1	H1	9M	FY
Aegide	3 months	6 months	9 months	12 months
Numeric UPS	3 months	6 months	9 months	12 months
NuVo	3 months	6 months	9 months	12 months
Daneva	Balance sheet only	6 months	9 months	12 months
Seico	Balance sheet only	5 months	8 months	11 months
S2S		Balance sheet only	To be determined	To be determined
Adlec			To be determined	To be determined

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