Rockwell Automation

expanding **human possibility**®

Q3 Fiscal 2026 Earnings Presentation

August 4, 2026

SAFE HARBOR STATEMENT

This presentation includes statements related to the expected future results of the company and are therefore forward-looking statements. Actual results may differ materially from those projections due to a wide range of risks and uncertainties, including those that are listed in our SEC filings.

This presentation also contains non-GAAP financial information and reconciliations to GAAP are included in the appendix. All information should be read in conjunction with our historical financial statements.

Q3 FY26 Results Highlights

- Reported sales up 8% YOY; organic sales up 10% YOY
  - Currency increased sales ~1 pt YOY; divestitures decreased sales ~(3) pts YOY
- Organic Annual Recurring Revenue (ARR) up 6% YOY; software ARR up high single digits YOY
- GAAP measures: pretax margin of 20.3% and diluted EPS of $3.65
- Enterprise operating margin of 22.3%, up 280 bps YOY; Adjusted EPS of $3.49, up 22% YOY
- Completed the dissolution of the Sensia joint venture on April 1

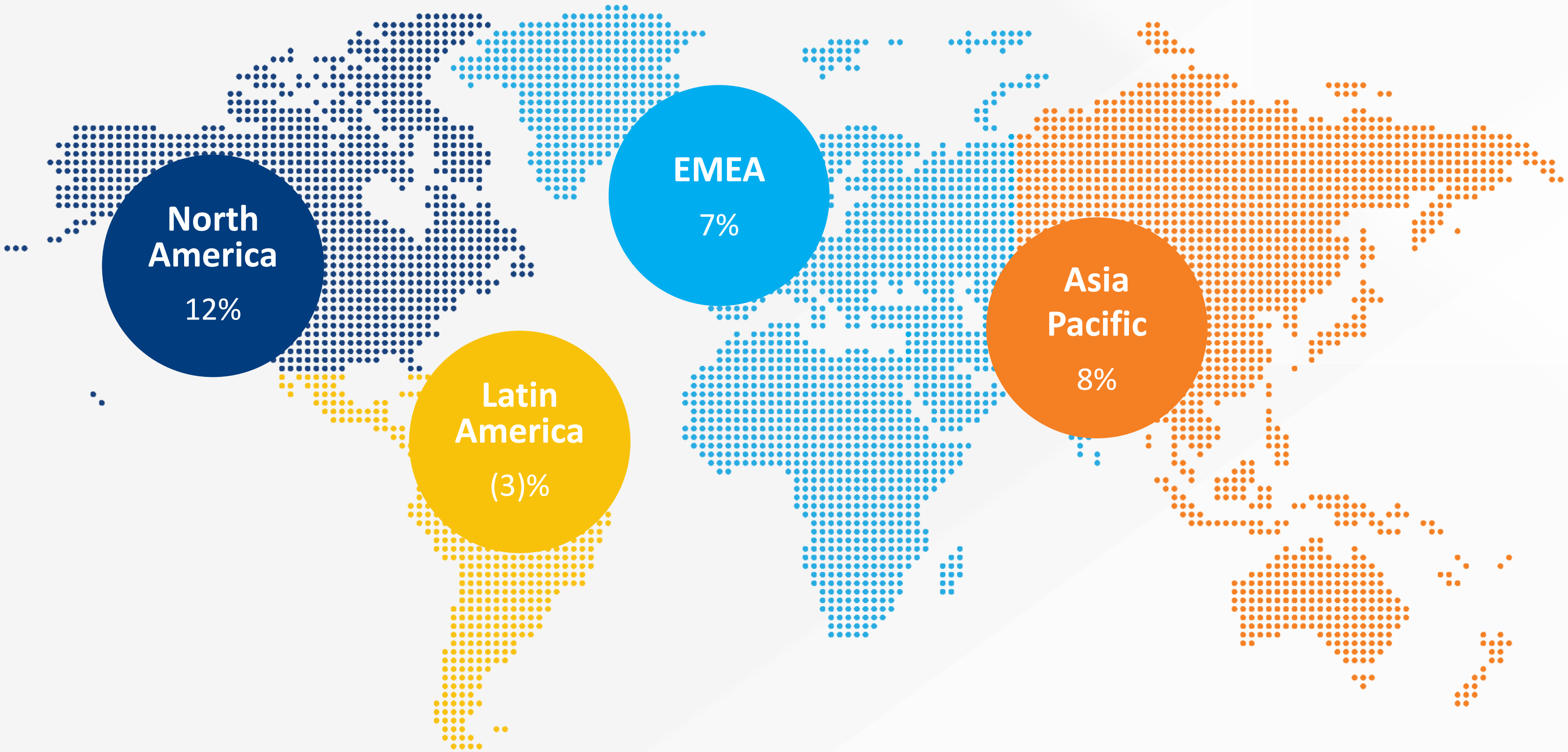
Sustained momentum with healthy customer demand and strong execution

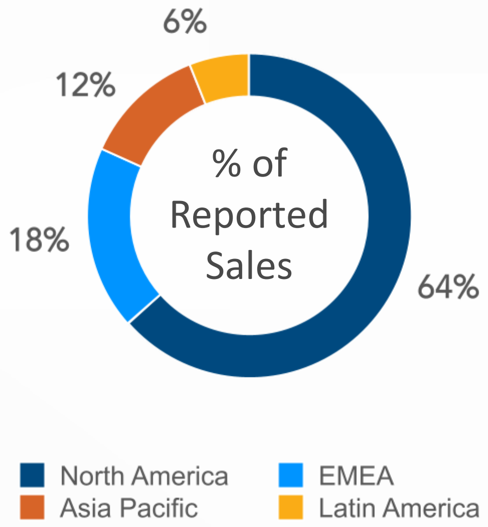
Q3 FY26 Organic Industry Segment Performance

	Q3 FY26 vs. Q3 FY25	Q3 FY26 vs. Q3 FY25
	Up high teens	↑ Automotive up low double digits ↑ Semiconductor up ~30% ↑ e-Commerce & Warehouse Automation up ~30%
	Up mid single digits	↑ Food & Beverage up mid single digits ↑ Home & Personal Care up high single digits ↑ Life Sciences up ~10%
	Up high single digits	↑ Energy up high single digits ↓ Mining down mid single digits ↑ Chemicals up low teens

Note: Organic sales growth rates depicted above exclude the impact of divestitures and currency. Arrows reflect positive/negative directional growth vs prior year.

Q3 FY26 Year-Over-Year Organic Sales Growth





Continue to expect North America to be the strongest region in FY26

Full Year Outlook Update

- Raising reported and organic sales growth range to 7.5% - 9.5% YOY
- Organic Annual Recurring Revenue (ARR) expected to grow mid single digits YOY
- Expect Enterprise operating margin of ~21.5%, up 260 bps YOY
- Raising Adjusted EPS range to $13.00 - $13.30, up ~25% YOY at the midpoint
- Expect Free Cash Flow conversion of ~100%

Note: Updated Guidance as of August 4, 2026; does not include sales, earnings, or cash flows related to the divested businesses of the Sensia joint venture in the second half of fiscal 2026.

Executing at the high end of our growth framework while expanding margins and investing for the future

Q3 FY26 Key Financial Information

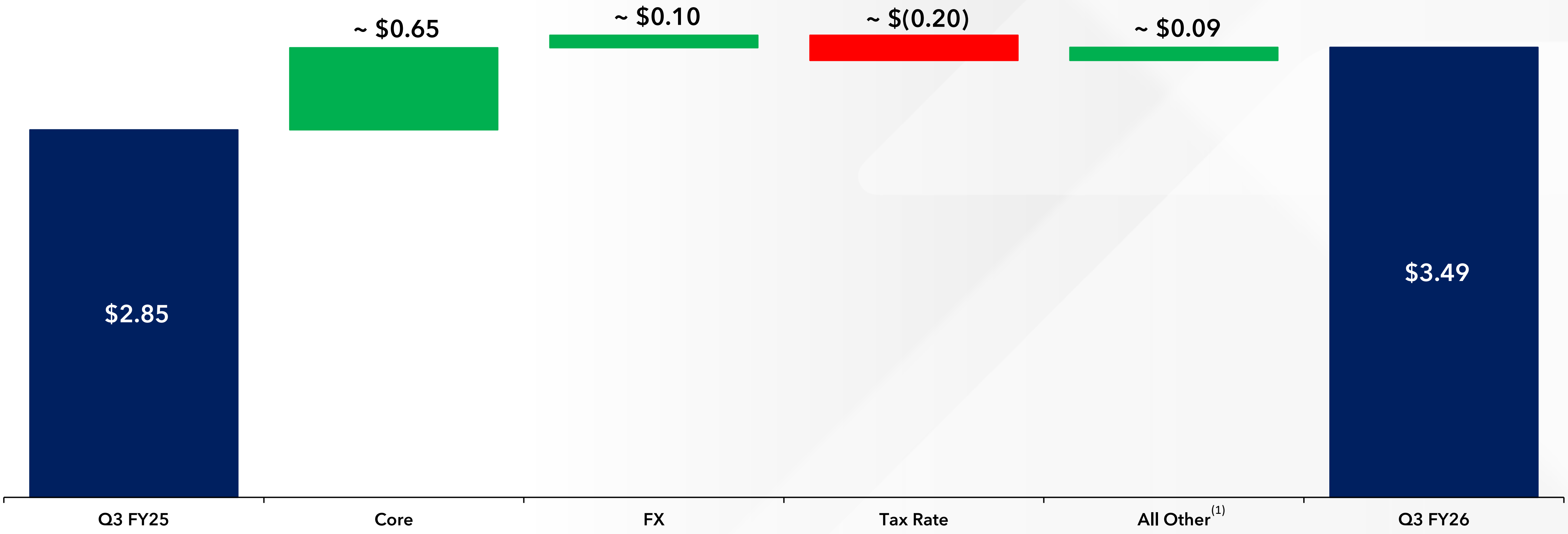
($ in millions, except per share amounts)

	Q3 FY26	Q3 FY25	YOY B/(W)
Sales	$2,313	$2,144	**Organic Growth** 10 % Inorganic Growth — % Currency Translation +1 % Divestitures (3)% **Reported Growth** +8 %
Enterprise operating margin	22.3%	19.5%	280 bps
Corporate and Other	$34	$36	$2
Adjusted EPS	$3.49	$2.85	22%
Adjusted Effective Tax Rate	19.2%	15.3%	(3.9) pts
Free Cash Flow	$654	$489	$165

Q3 FY26 Segment Results

Segment	Sales ($ in millions; YOY growth %)		Segment Operating Margin	Segment Highlights
Intelligent Devices	$1,080M	**Organic** +10 % Inorganic — % Currency +2 % Divestitures — % **Reported** 12 %	**20.0%** **+120 bps YOY**	Higher segment margin YOY driven by higher sales volume, favorable currency, and favorable mix, partially offset by negative price/cost
Software & Control	$751M	**Organic** +18 % Inorganic — % Currency +1 % Divestitures — % **Reported** +19 %	**34.8%** **+320 bps YOY**	Higher segment margin YOY driven by higher sales volume, partially offset by negative price/cost
Lifecycle Services	$482M	**Organic** (2)% Inorganic — % Currency +1 % Divestitures (11) % **Reported** (12) %	**15.1%** **+180 bps YOY**	Book-to-bill of 0.97 Higher segment margin YOY driven by strong project execution and the margin benefit from the Sensia joint venture dissolution, partially offset by lower sales volume

Q3 FY25 to Q3 FY26 Adjusted EPS Walk



[1] All Other includes: Interest Expense, Shares, Corp Items, and Pension.

FY26 Guidance

	Updated Guidance	Prior Guidance
Reported Sales Midpoint	~ $9.0B	~ $8.9B
Organic Growth	7.5% - 9.5%	5% - 9%
Divestiture	~ (1.5)%	~ (1.5)%
Currency Translation	~ 1.5%	~ 1.5%
Enterprise Operating Margin	~ 21.5%	~ 21.5%
Adjusted Effective Tax Rate	~ 19.5%	~ 19.5%
Adjusted EPS Range	$13.00 - $13.30	$12.50 - $13.10
Free Cash Flow Conversion	~ 100%	~ 100%

Note: Updated Guidance as of August 4, 2026; Prior Guidance as of May 5, 2026. Guidance does not include sales, earnings, or cash flows related to the divested businesses of the Sensia joint venture in the second half of fiscal 2026.

FY26 Updated vs Prior Guidance Adjusted EPS Walk

Note: Guidance as of August 4, 2026; Prior Guidance as May 5, 2026. Guidance does not include sales, earnings, or cash flows related to the divested businesses of the Sensia joint venture in the second half of fiscal 2026.

(1) All Other includes: Currency, Corp Items, Interest Expense, Tax Rate, and Shares.

Appendix

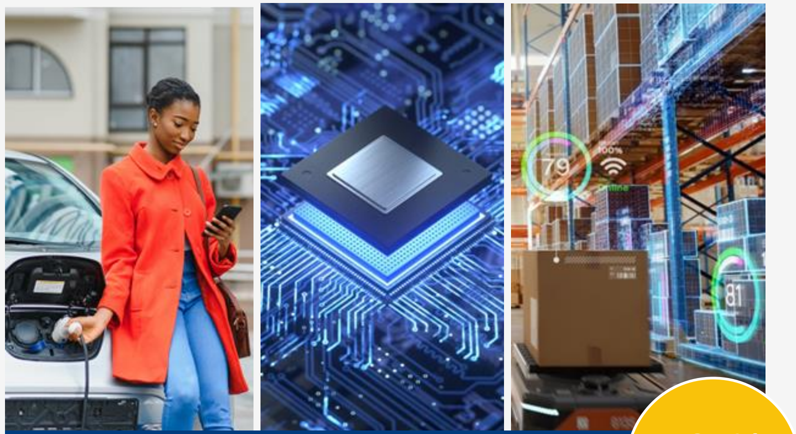
FY26 Organic Industry Segment Outlook

	FY26 vs. FY25	Assumptions at Guidance Midpoint
	Up mid teens	Automotive up high single digits Semiconductor up ~20% e-Commerce & Warehouse Automation up ~30%
	Up mid single digits	Food & Beverage up mid single digits Life Sciences up mid single digits Home & Personal Care up mid single digits
	Up mid single digits	Energy up high single digits Mining flat Chemicals up mid single digits

Note: Guidance as of August 4, 2026; Organic sales growth rates depicted above exclude the impact of divestitures and currency. Arrows reflect positive/negative directional growth vs prior year.

Industry Segmentation

% of FY25 Sales



DISCRETE

~25% of sales

~10% Automotive

~5% Semiconductor

~5% e-Commerce & Warehouse Automation

~5% General Industries

- Marine
- Mass Transit
- Glass
- Fibers & Textiles
- Entertainment
- Airports
- Aerospace
- Print & Publishing

HYBRID

~35% of sales

~20% Food & Beverage

~5% Life Sciences

~5% Household & Personal Care

~5% Tire

PROCESS

~40% of sales

~15% Energy

~5% Mining

~5% Metals

~5% Chemicals

~5% Water / Wastewater

~5% Pulp & Paper

Q3 FY26 Results: Summary

Financial Summary ($ in millions, except per share amounts)	Three Months Ended June 30, 2026	Three Months Ended June 30, 2025
Total sales	$ 2,313	$ 2,144
Enterprise operating profit	$ 516	$ 418
Amortization of acquisition-related intangible assets	(30)	(35)
Non-operating pension and postretirement benefit credit	4	—
Net legacy asbestos and environmental charges (1)	(1)	(4)
Gain on dissolution of Sensia, net of transaction costs	18	—
Change in fair value of investments	(7)	—
Interest expense, net	(30)	(37)
Income tax provision	(62)	(49)
Net income	$ 408	$ 293
Net loss attributable to noncontrolling interests	—	(2)
Net income attributable to Rockwell Automation	$ 408	$ 295
Adjustments		
Non-operating pension and postretirement benefit credit, net of tax	$ (3)	$ (1)
Amortization of acquisition-related intangible assets attributable to Rockwell Automation, net of tax	22	26
Net legacy asbestos and environmental charges, net of tax	—	3
Change in fair value of investments, net of tax	5	—
Gain on dissolution of Sensia, net of transaction costs, tax, and tax items attributable to Rockwell Automation	(41)	—
Adjusted Income	$ 391	$ 323
Adjusted EPS	$ 3.49	$ 2.85
Average diluted shares	111.6	113.0

(1) Legacy asbestos and environmental charges were previously included in Corporate and other. Three months ended June 30, 2025 has been recast to conform with current year presentation.

Reconciliation to Non-GAAP Measures

<u>Free Cash Flow</u>

($ in millions)

	Three Months Ended June 30,		**Nine Months Ended June 30,**	
	2026	**2025**	**2026**	**2025**
Net income	$ 408	$ 293	$ 1,061	$ 719
Depreciation/Amortization	79	81	237	240
Retirement benefits expense	6	10	19	31
Receivables/Inventory/Payables	60	5	(53)	(13)
Compensation and benefits	47	56	(26)	87
Pension contributions	(2)	(2)	(5)	(8)
Gain on dissolution of Sensia	(20)	—	(20)	—
Income taxes	(10)	(11)	(92)	(130)
Other	156	95	157	164
Cash flow from operations	724	527	1,278	1,090
Capital expenditures	(70)	(38)	(179)	(137)
Free cash flow	$ 654	$ 489	$ 1,099	$ 953
Adjusted Income	$ 391	$ 323	$ 1,075	$ 818
Free cash flow conversion	167 %	151 %	102 %	117 %

Reconciliation to Non-GAAP Measures

Organic Sales

($ in millions)

	Three Months Ended June 30, 2026			Three Months Ended June 30, 2025						
	Reported Sales(a)	Effect of Changes in Currency(d)	Organic Sales(b)	Reported Sales(c)	Divestiture(e)	Sales Excluding Divestiture(f)	Reported Sales Growth (a)/(c)	Effect of Changes in Currency (d)/(c)	Effect of Change from Divestiture (e)/(f)	Organic Sales Growth (b)/(f)
North America	$ 1,482	$ 1	$ 1,481	$ 1,354	$ (34)	$ 1,320	9%	—%	(3)%	12%
EMEA	404	12	$ 392	392	(25)	367	3%	3%	(7)%	7%
Asia Pacific	288	2	$ 286	266	(2)	264	8%	—%	— %	8%
Latin America	139	12	$ 127	132	(1)	131	5%	9%	(1)%	(3)%
Total	$ 2,313	$ 27	$ 2,286	$ 2,144	$ (62)	$ 2,082	8%	1%	(3)%	10%

	Three Months Ended June 30, 2026			Three Months Ended June 30, 2025						
	Reported Sales(a)	Effect of Changes in Currency(d)	Organic Sales(b)	Reported Sales(c)	Divestiture(e)	Sales Excluding Divestiture(f)	Reported Sales Growth (a)/(c)	Effect of Changes in Currency (d)/(c)	Effect of Change from Divestiture (e)/(f)	Organic Sales Growth (b)/(f)
Intelligent Devices	$ 1,080	$ 13	$ 1,067	$ 968	$ —	$ 968	12%	2%	— %	10%
Software & Control	751	9	742	629	—	629	19%	1%	— %	18%
Lifecycle Services	482	5	477	547	(62)	485	(12)%	1%	(11)%	(2)%
Total	$ 2,313	$ 27	$ 2,286	$ 2,144	$ (62)	$ 2,082	8%	1%	(3)%	10%

Reconciliation to Non-GAAP Measures

Enterprise Operating Profit and Enterprise Operating Margin

($ in millions)

	Three Months Ended June 30, 2026	Three Months Ended June 30, 2025
Sales		
Intelligent Devices (a)	$ 1,080	$ 968
Software & Control (b)	751	629
Lifecycle Services (c)	482	547
Total sales (d)	$ 2,313	$ 2,144
Segment operating earnings		
Intelligent Devices (e)	$ 216	$ 182
Software & Control (f)	261	199
Lifecycle Services (g)	73	73
Corporate and other [1] (h)	(34)	(36)
Enterprise operating profit [2] (i)	516	418
Amortization of acquisition-related intangible assets [3]	(30)	(35)
Non-operating pension and postretirement benefit credit	4	—
Net legacy asbestos and environmental charges [1]	(1)	(4)
Change in fair value of investments	(7)	—
Gain on dissolution of Sensia, net of transaction costs	18	—
Interest expense, net	(30)	(37)
Income before income taxes (j)	$ 470	$ 342
Pretax margin (j/d)	20.3 %	16.0 %
Intelligent Devices (e/a)	20.0 %	18.8 %
Software & Control (f/b)	34.8 %	31.6 %
Lifecycle Services (g/c)	15.1 %	13.3 %
Corporate and other [1] (h/d)	(1.5)%	(1.7)%
Enterprise operating margin [2] (i/d)	22.3 %	19.5 %

[1] Legacy asbestos and environmental charges were previously included in Corporate and other. Three months ended June 30, 2025 has been recast to conform with current year presentation.

[2] Enterprise operating profit and Enterprise operating margin are non-GAAP financial measures. We exclude from income before income taxes and pre-tax margin amortization of acquisition-related intangible assets, impairment, non-operating pension and postretirement benefit credit, net legacy asbestos and environmental charges, gain on dissolution of Sensia, net of transaction costs, change in fair value of investments, restructuring charges aligned with enterprise-wide strategic initiatives, and interest expense, net, because we do not consider these items to be directly related to the operating performance of our segments. We believe Enterprise operating profit and Enterprise operating margin are useful to investors as measures of operating performance. We use these measures to monitor and evaluate the profitability of our operating segments. Our measures of Enterprise operating profit and Enterprise operating margin may be different from measures used by other companies.

[3] Amortization of acquisition-related intangibles excludes amortization of internally developed and capitalized intangible assets.

Reconciliation to Non-GAAP Measures

Adjusted Income, Adjusted EPS, and Adjusted Effective Tax Rate

($ in millions, except per share amounts)

	Three Months Ended June 30,	
	2026	2025
Net income attributable to Rockwell Automation	$ 408	$ 295
Non-operating pension and postretirement benefit credit	(4)	—
Tax effect of non-operating pension and postretirement credit	1	(1)
Amortization of acquisition-related intangible assets attributable to Rockwell Automation	30	33
Tax effect of amortization of acquisition-related intangible assets attributable to Rockwell Automation	(8)	(7)
Net legacy asbestos and environmental charges	1	4
Tax effect of net legacy asbestos and environmental charges	(1)	(1)
Change in fair value of investments	7	—
Tax effect of change in fair value of investments	(2)	—
Gain on dissolution of Sensia, net of transaction costs attributable to Rockwell Automation	(18)	—
Tax and tax items associated with gain on dissolution of Sensia, net of transaction costs attributable to Rockwell Automation	(23)	—
Adjusted Income	$ 391	$ 323
Diluted EPS	$ 3.65	$ 2.60
Non-operating pension and postretirement credit	(0.04)	—
Tax effect of non-operating pension and postretirement credit	0.01	(0.01)
Amortization of acquisition-related intangible assets attributable to Rockwell Automation	0.27	0.29
Tax effect of amortization of acquisition-related intangible assets attributable to Rockwell Automation	(0.07)	(0.06)
Net legacy asbestos and environmental charges	0.01	0.04
Tax effect of net legacy asbestos and environmental charges	(0.01)	(0.01)
Change in fair value of investments	0.06	—
Tax effect of change in fair value of investments	(0.02)	—
Gain on dissolution of Sensia, net of transaction costs attributable to Rockwell Automation	(0.17)	—
Tax and tax items associated with gain on dissolution of Sensia, net of transaction costs attributable to Rockwell Automation	(0.20)	—
Adjusted EPS	$ 3.49	$ 2.85
Effective tax rate	13.2 %	14.3 %
Tax effect of non-operating pension and postretirement credit	(0.1)%	0.3 %
Tax effect of amortization of acquisition-related intangible assets attributable to Rockwell Automation	0.9 %	0.6 %
Tax effect of net legacy asbestos and environmental charges	0.2 %	0.1 %
Tax effect of change in fair value of investments	0.2 %	— %
Tax and tax items associated with gain on dissolution of Sensia, net of transaction costs attributable to Rockwell Automation	4.8 %	— %
Adjusted Effective Tax Rate	19.2 %	15.3 %

Reconciliation to Non-GAAP Measures

Non-operating pension and postretirement benefit credit

($ in millions)

	Three Months Ended June 30,			
	2026		2025	
Interest cost	$	34	$	35
Expected return on plan assets		(42)		(42)
Amortization of net actuarial loss		4		7
Non-operating pension and postretirement benefit credit	$	(4)	$	—

Reconciliation to Non-GAAP Measures

Return On Invested Capital

($ in millions)

	ROIC		Adjusted ROIC	
	Twelve Months Ended June 30,			
	2026	2025	2026	2025
(a) Return				
Net income	$ 1091	$ 957	$ 1091	$ 957
Interest expense	138	160	138	160
Income tax provision	224	171	224	171
Amortization of acquisition-related intangible assets	—	—	126	142
Impairment	—	—	224	—
Return	$ 1,453	$ 1,288	$ 1,803	$ 1,430
(b) Average invested capital				
Short-term debt	$ 818	$ 1,043	$ 818	$ 1,043
Long-term debt	2,589	2,574	2,589	2,574
Shareowners’ equity	3,620	3,559	3,620	3,559
Accumulated amortization of goodwill and intangibles	—	—	1,405	1,368
Cash and cash equivalents	(479)	(459)	(479)	(459)
Short-term and long-term investments	—	(2)	—	(2)
Average invested capital	$ 6,548	$ 6,715	$ 7,953	$ 8,083
(c) Effective tax rate				
Income tax provision	$ 224	$ 171	$ 224	$ 171
Income before income taxes	1,315	1,128	1,315	1,128
Effective tax rate	17.0 %	15.2 %	17.0 %	15.2 %
(a) / (b) * (1-c) Return On Invested Capital	18.4 %	16.3 %	18.8 %	15.0 %

Reconciliation to Non-GAAP Measures

Fiscal 2026 Guidance

($ in billions, except per share amounts)

	Fiscal 2026 Guidance
Organic Sales	
Organic sales growth	7.5% - 9.5%
Divestiture	~ (1.5)%
Foreign currency impact	~ 1.5%
Reported sales growth	7.5% - 9.5%
Enterprise Operating Margin	
Total sales (a)	$ ~9.0
Enterprise operating profit (b)	~1.9
Costs excluded from Enterprise operating profit	~(0.2)
Income before income taxes (c)	$ ~1.7
Enterprise operating margin (b/a)	~ 21.5%
Pretax margin (c/a)	~ 19.0%
Adjusted Effective Tax Rate	
Effective tax rate	~ 16.5%
Tax effect of non-operating pension and postretirement benefit credit	~ —%
Tax effect of amortization of acquisition-related intangible assets attributable to Rockwell Automation	~ 0.5%
Tax effect of net legacy asbestos and environmental charges	~ —%
Tax effect of change in fair value of investments [1]	~ —%
Tax and tax items associated with gain on dissolution of Sensia, net of transaction costs attributable to Rockwell Automation [1]	~ 2.5%
Adjusted Effective Tax Rate	~ 19.5%
Adjusted EPS	
Diluted EPS	$12.72 - $13.02
Non-operating pension and postretirement benefit credit, net of tax	(0.09)
Amortization of acquisition-related intangible assets attributable to Rockwell Automation, net of tax	0.80
Legacy asbestos and environmental charges, net of tax	0.02
Change in fair value of investments [1]	0.04
Gain on dissolution of Sensia, net of transaction costs, tax, and tax items attributable to Rockwell Automation [1]	(0.49)
Adjusted EPS	$13.00 - $13.30

[1] Items are not forecast due to difficulty in projecting future values.

Note: Guidance as of August 4, 2026; does not include sales, earnings, or cash flows related to the divested businesses of the Sensia joint venture in the second half of fiscal 2026.

Reconciliation to Non-GAAP Measures

Free Cash Flow Conversion

($ in billions)

		Fiscal 2026 Guidance
Net income attributable to Rockwell Automation at the mid-point	$	~1.5
Non-operating pension and postretirement benefit credit, net of tax		~—
Amortization of acquisition-related intangible assets attributable to Rockwell Automation, net of tax		~(0.1)
Net legacy asbestos and environmental charges, net of tax		~—
Change in fair value of investments, net of tax		~—
Gain on dissolution of Sensia, net of transaction costs, tax, and tax items attributable to Rockwell Automation		~0.1
Adjusted Income at the mid-point (a)	$	~1.5
Cash provided by operating activities	$	~1.8
Capital expenditures		~(0.3)
Free cash flow (b)	$	~1.5
Free cash flow conversion (b/a)	~	100%

Note: Guidance as of August 4, 2026; does not include sales, earnings, or cash flows related to the divested businesses of the Sensia joint venture in the second half of fiscal 2026.

Performance Metric Definition

Total ARR

Annual recurring revenue (ARR) is a key metric that enables measurement of progress in growing our recurring revenue business. It represents the annual contract value of all active recurring revenue contracts at any point in time. Recurring revenue is defined as a revenue stream that is contractual, typically for a period of 12 months or more, and has a high probability of renewal. The probability of renewal is based on historical renewal experience of the individual revenue streams, or management's best estimates if historical renewal experience is not available. Total ARR growth is calculated as the dollar change in ARR, adjusted to exclude the effects of currency, divided by ARR as of the prior period. The effects of currency translation are excluded by calculating Total ARR on a constant currency basis. Total ARR includes acquisitions even if there was no comparable ARR in the prior period. We believe that Total ARR provides useful information to investors because it reflects our recurring revenue performance period over period including the effect of acquisitions. Our measure of ARR may be different from measures used by other companies. Because ARR is based on annual contract value, it does not represent revenue recognized during a particular reporting period or revenue to be recognized in future reporting periods and is not intended to be a substitute for revenue, contract liabilities, or backlog.

Organic ARR

Organic annual recurring revenue is Total ARR that excludes comparable ARR in the prior period for businesses that we have divested.

Book-to-bill

Book to bill is a key metric that provides an indication on the level of demand. Book to bill represents the growth or decline in backlog in the Lifecycle Services segment. A book to bill greater than one indicates a growing backlog while a book to bill less than one indicates a declining backlog. Book to bill is calculated as orders divided by sales for a specified period. We believe that book to bill provides useful information to investors about the strength of our Lifecycle Services segment backlog. Our measure of book to bill may be different from measures used by other companies.

Thank you

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