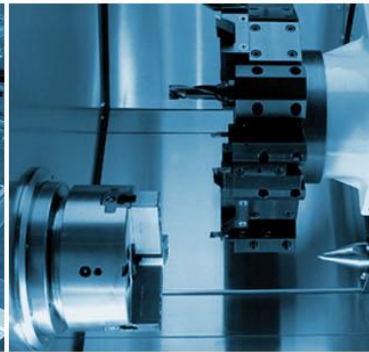




ROMI®

A TRADITION OF INNOVATION



2Q15 Earnings Release

July 29, 2015



Índice de
Ações com Tag Along
Diferenciado **ITAG**

Índice de
Ações com Governança
Corporativa Diferenciada **IGC**



This release contains forward-looking statements subject to risks and uncertainties, Such forward-looking statements are based on the management's beliefs and assumptions on information currently available to the Company, The reservations as to forward-looking statements also apply to information on possible or presumed operating results, as well as any statements preceded, followed or including words such as "believes", "may", "will", "expects", "intends", "plans", "estimates" or similar expressions, Forward-looking statements are not performance guarantees; they involve risks, uncertainties and assumptions because they refer to future events and, therefore, depend on circumstances which may or may not occur, Future results may differ materially from those expressed or suggested by forward-looking statements, Many of the factors which will determine these results and figures are beyond Romi's control or prediction capacity.

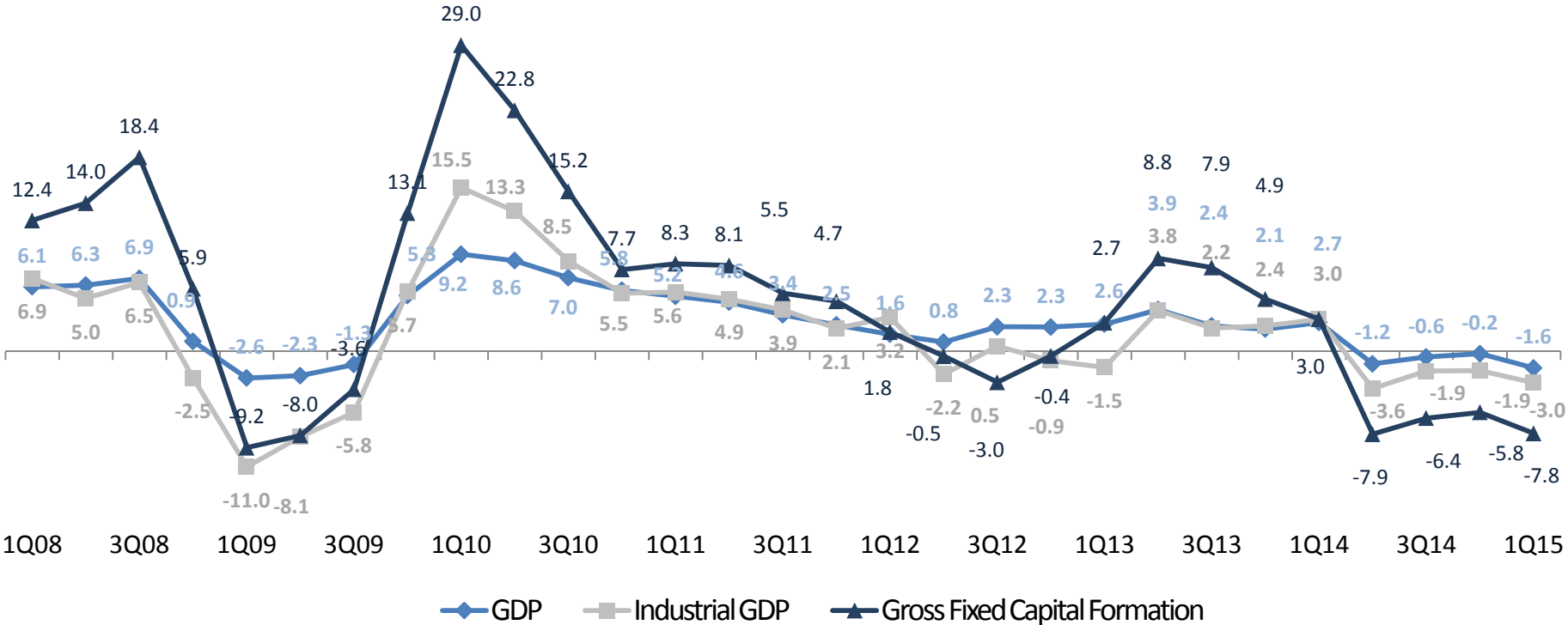


- The **Order Entry** of the Raw and Machined Cast Iron Parts Business Unit reached **R\$65.8** million in 2Q15, **boosted by Wind Power**.
- **Net operating revenue** fell by **17.1%** in 2Q15 compared to 2Q14, due to a decrease in demand in the Brazilian market.
- The **EBITDA** in 2Q15 was **negative by R\$9** million, due to the decrease in net operating revenue and the expenses incurred on the optimization of the organizational structure, which impacted the EBITDA for 2Q15 by R\$4.1 million.
- In 2Q15, compared to 2Q14, the **Raw and Machined Cast Iron Parts Business Unit improved by 8.9% and 5.1% in gross margins and EBITDA**, respectively, due to the increase in the business volume related to the Wind Power segment.
- **Net debt** increased by **30.2%** in 2Q15 (R\$24.4 million), as a result of the increase in the inventory level of the German subsidiary B+W, which has its revenues concentrated in the second half of the year, and the expenses incurred on the optimization of the organizational structure.
- The **order backlog** as at June 30, 2015, compared to March 31, 2015, posted **growth of 11.2%** due to the increase in the order entry of the **Raw and Machined Cast Iron Parts Business Unit**.

Economic Indexes – Conjunctural Indicators

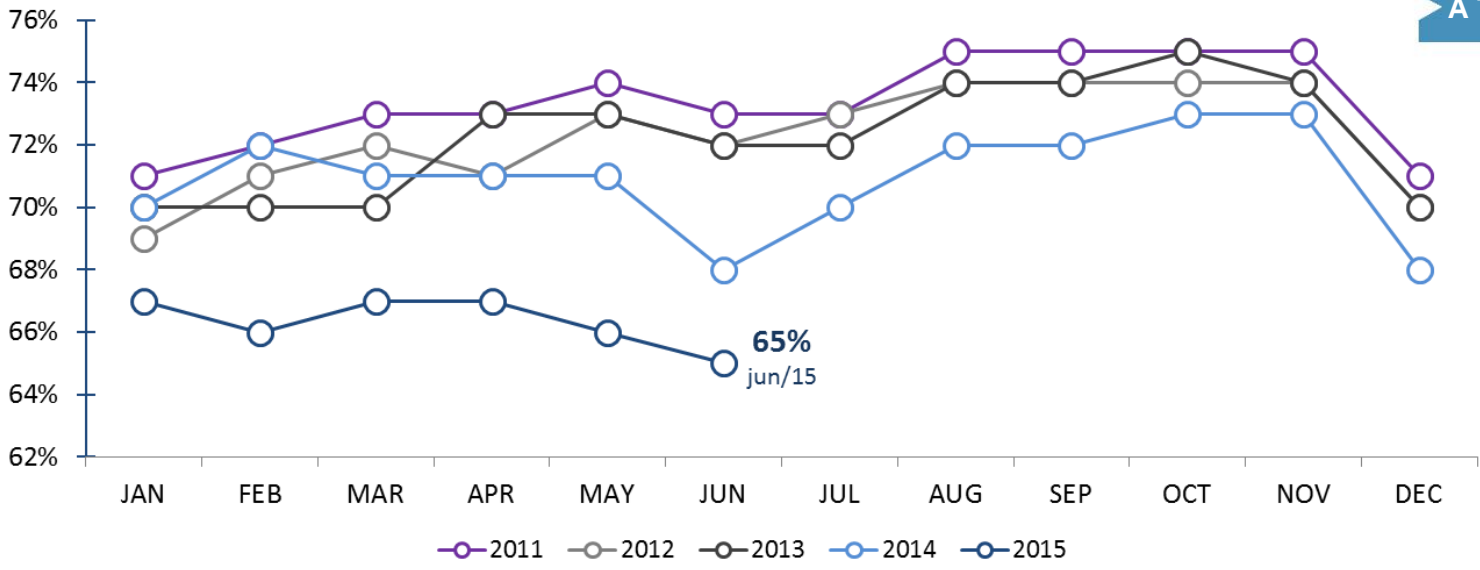


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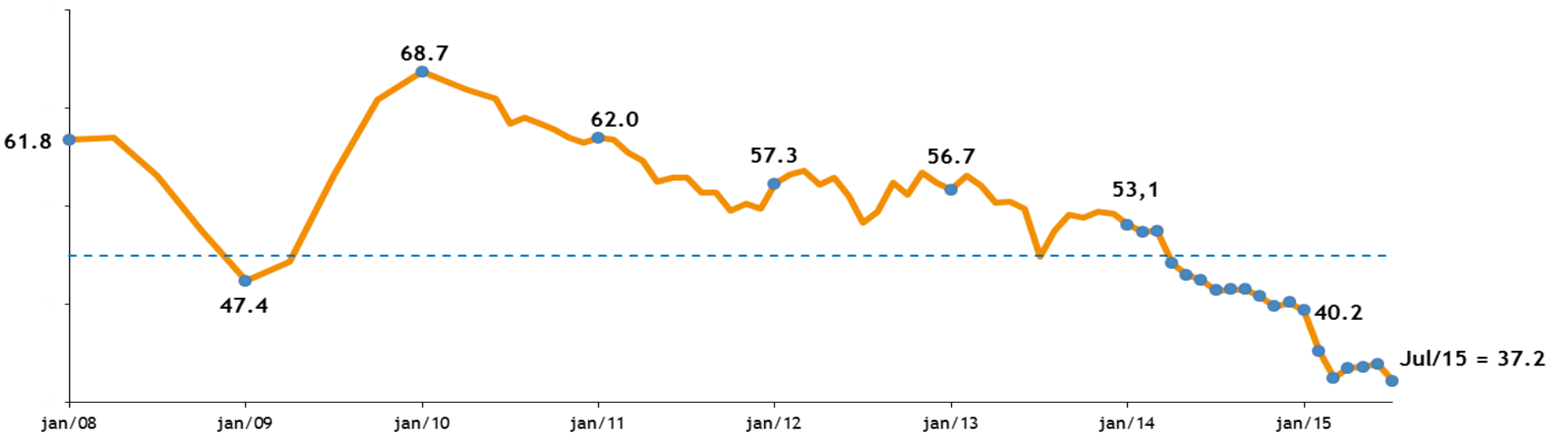


Source: IBGE (quarter this year vs, quarter last year)

Economic Indexes – Conjunctural Indicators



Source: CNI – UCI (Utilization of Installed Capacity), Jun 2015



Source: CNI – ICEI (Industrial Executive Confidence Index), Jul, 2015



Machine Tools



Plastic Machines



Raw and Machined Cast Iron Parts



	1H15	2014
Machines and Equipments	16%	15%
Technical Schools	13%	16%
Automotive	11%	7%
Job Shops	10%	22%
Mining Steel	5%	2%
Tooling	4%	6%
Agricultural Equipment	4%	5%
Others	37%	27%

	1H15	2014
Packaging	22%	41%
Automotive	17%	14%
Job Shops	19%	10%
Furniture	6%	11%
Real Estate	6%	3%
Others	30%	21%

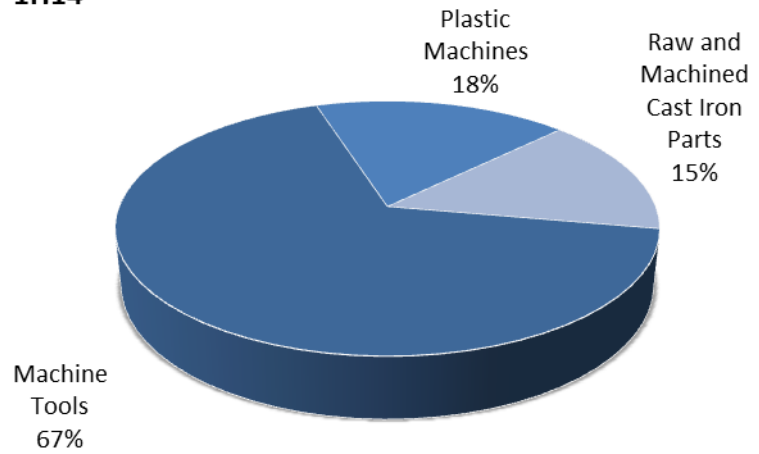
	1H15	2014
Wind Power	44%	24%
Automotive - Trucks	27%	45%
Agriculture	27%	25%
Others	2%	6%

Net Sales per Business Unit

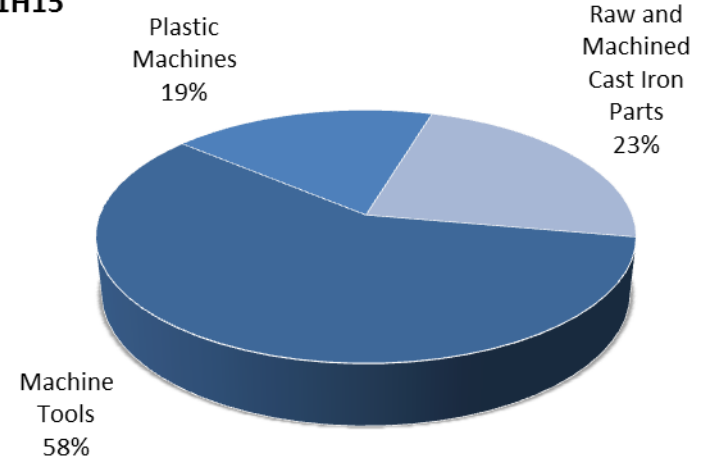


A TRADITION OF INNOVATION

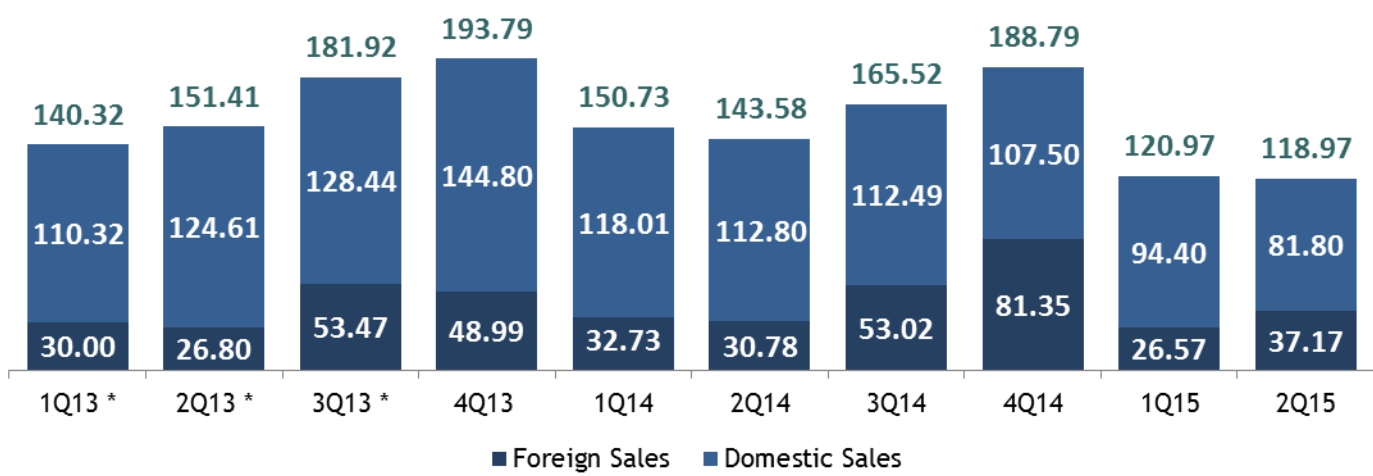
1H14



1H15



Net Operating Sales (R\$ million)

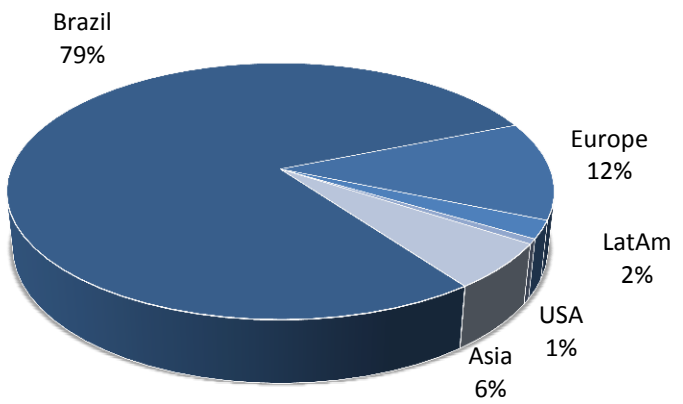


* Amounts relating to continued operations, excluding revenues from the subsidiary Romi Italia, which are presented as discontinued operations,

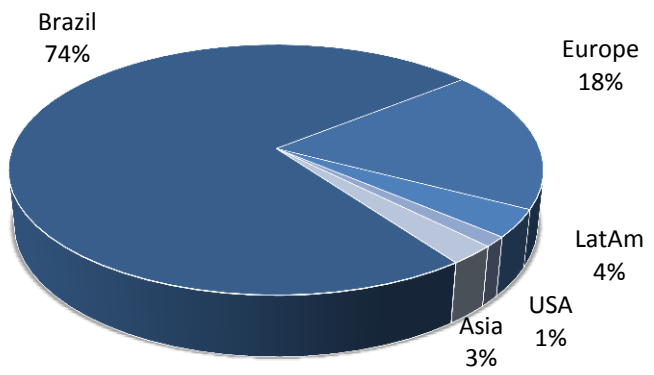
Sales Distribution



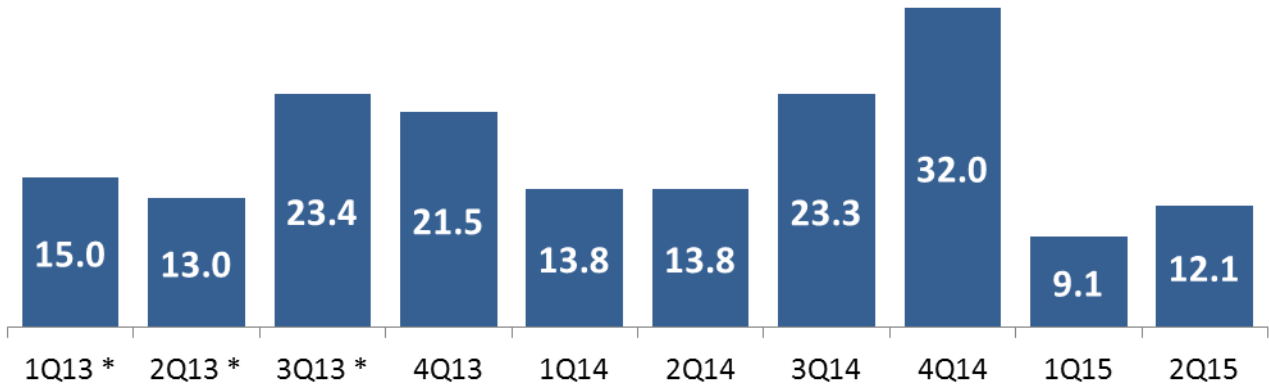
1H14



1H15



Foreign Sales (R\$ million)



* Amounts relating to continued operations, excluding the revenue from the subsidiary Romi Italia, which are presented as discontinued operations,

Order Entry and Backlog



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Order Entry (R\$ 000) Gross Values, sales taxes included	2Q14	3Q14	4Q14	1Q15	2Q15	Chg 2Q15/1Q15	Chg 2Q15/2Q14
Machine Tools	117,411	95,697	114,601	47,636	60,219	26.4%	-48.7%
Plastic Machines	24,100	20,178	27,974	14,163	7,260	-48.7%	-69.9%
Rough and Machined Cast Iron Parts	26,899	34,371	56,664	32,802	65,797	100.6%	144.6%
Total	168,410	150,245	199,239	94,602	133,276	40.9%	-20.9%

Order Entry (R\$ 000) Gross Values, sales taxes included	1H14	1H15	Chg, 1H15/1H14
Machine Tools	236,948	107,856	-54.5%
Plastic Machines	42,437	21,423	-49.5%
Rough and Machined Cast Iron Parts	63,346	98,599	55.7%
Total	342,731	227,878	-33.5%

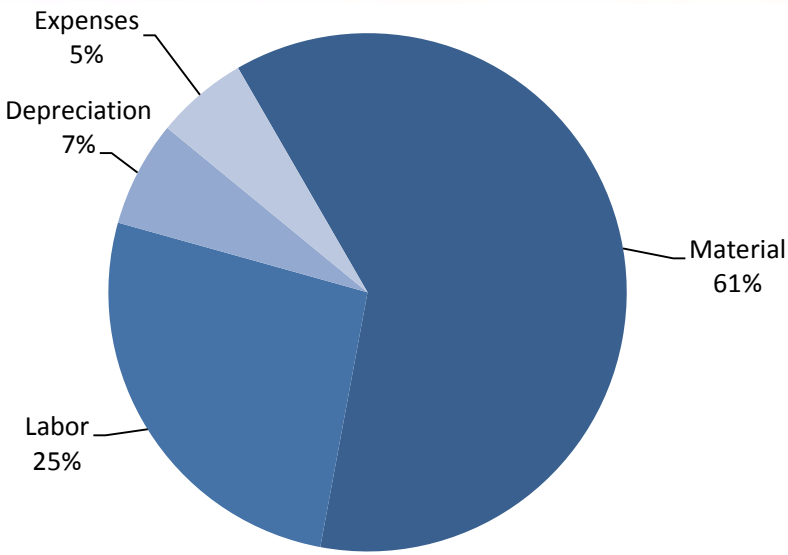
Order Book (R\$ 000) Gross Values, sales taxes included	2Q14	3Q14	4Q14	1Q15	2Q15	Chg 2Q15/1Q15	Chg 2Q15/2Q14
Machine Tools	248,174	215,695	189,247	173,580	185,745	7.0%	-25.2%
Plastic Machines	35,819	24,254	35,351	30,009	13,397	-55.4%	-62.6%
Rough and Machined Cast Iron Parts	35,979	34,403	55,959	56,953	90,526	58.9%	151.6%
Total (*)	319,971	274,351	280,557	260,541	289,668	11.2%	-9.5%

(*) Order book values doesn't include spare parts and services

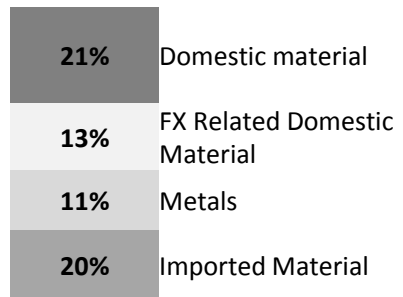
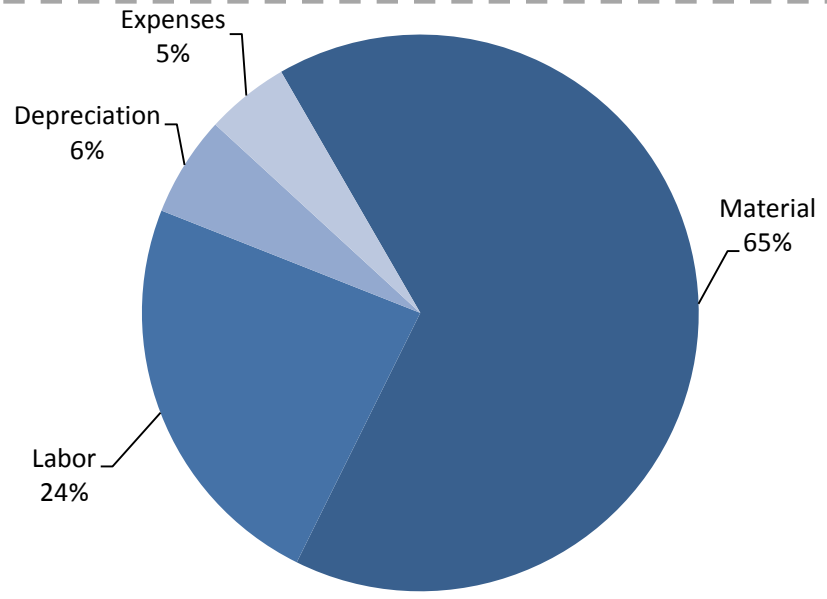
Cost of Goods Sold



1H15

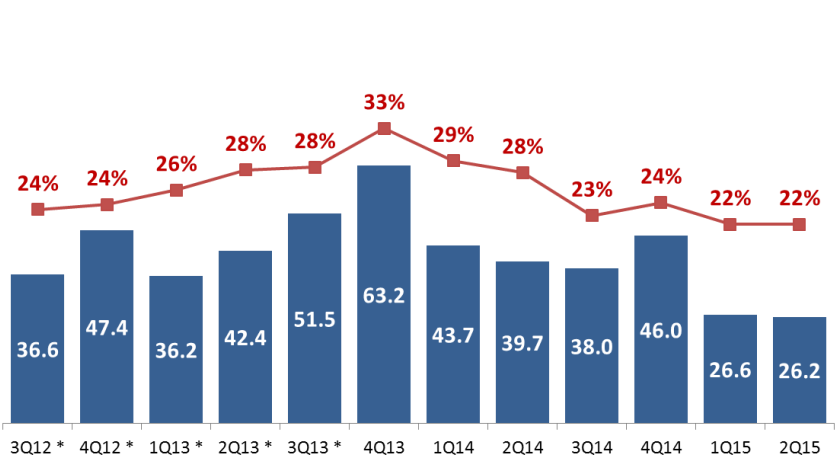


1H14

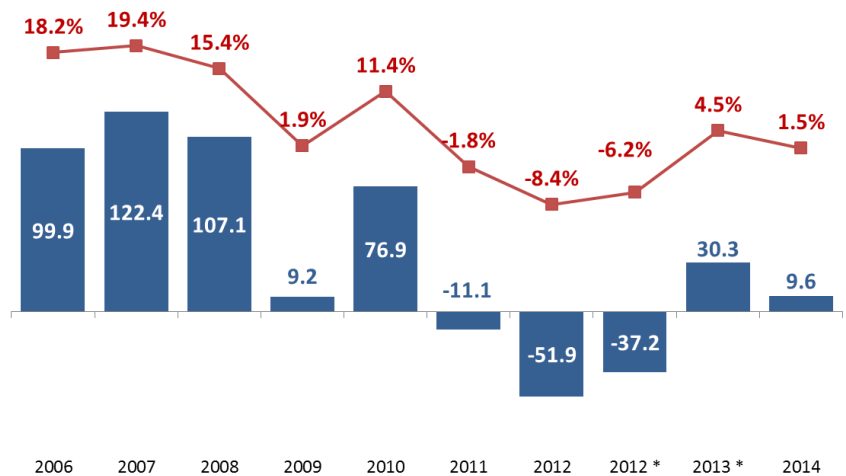
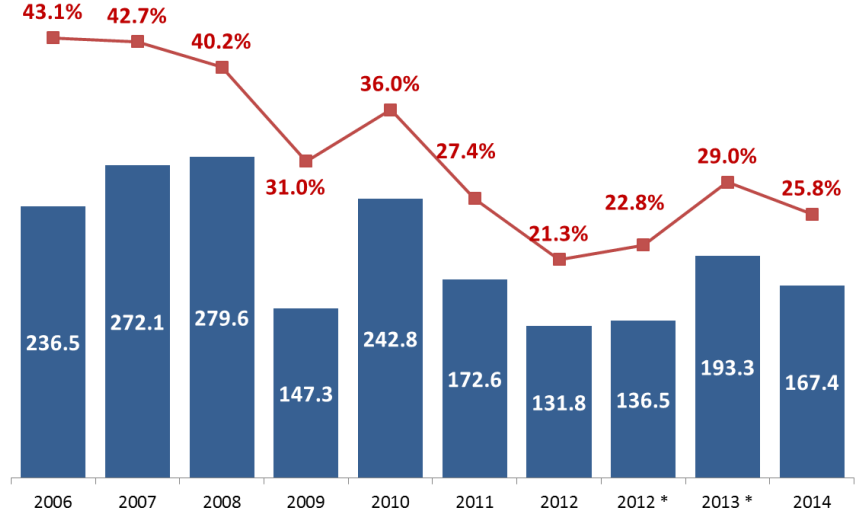
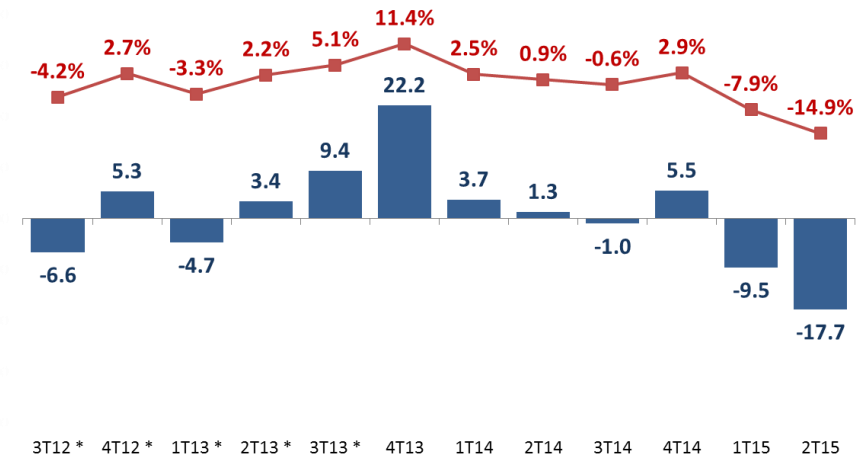




Gross Profit (R\$ million) and Gross Margin



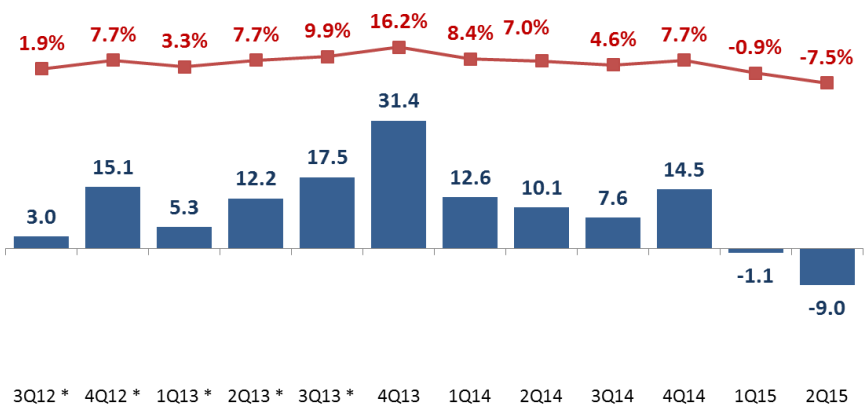
Operating Profit (R\$ million) and Operating Margin



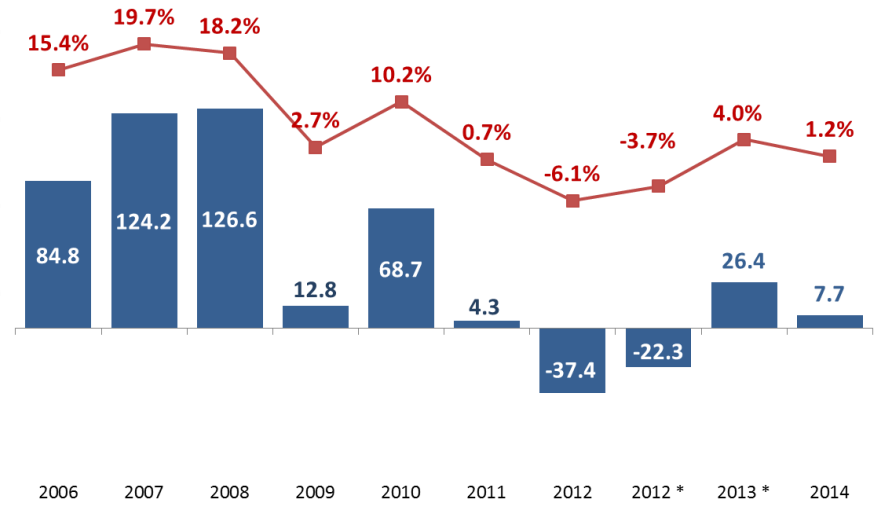
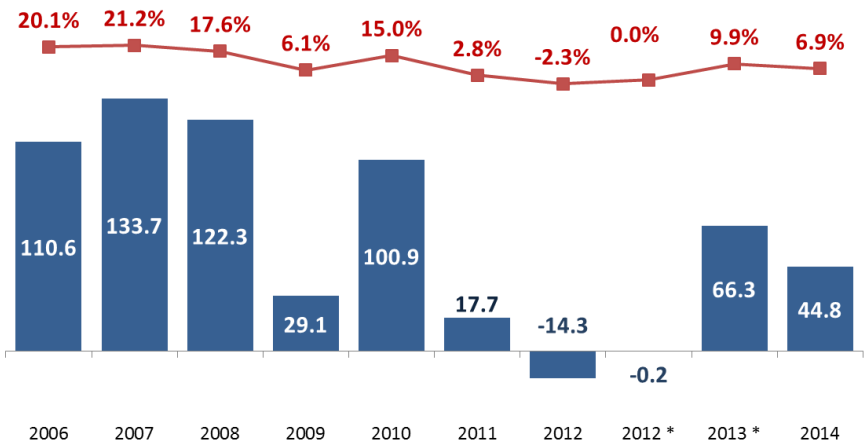
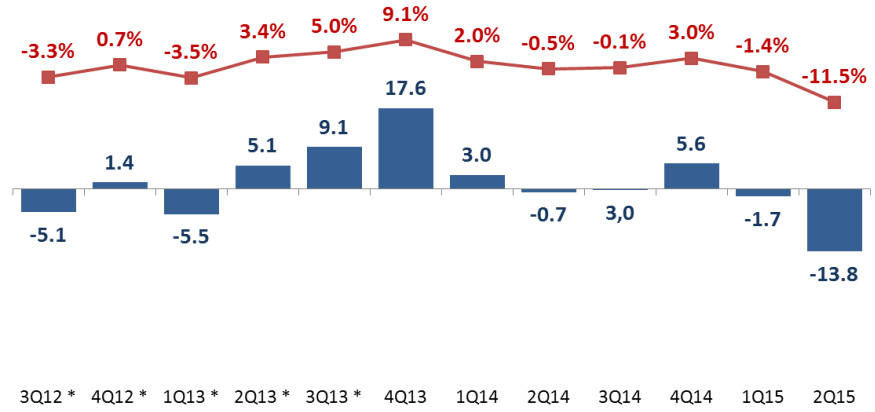
* Amounts relating to continued operations, excluding the results from the subsidiary Romi Italia



EBITDA (R\$ million) and EBITDA Margin



Net Income (R\$ million) and Net Margin



* Amounts relating to continued operations, excluding the results from the subsidiary Romi Italia

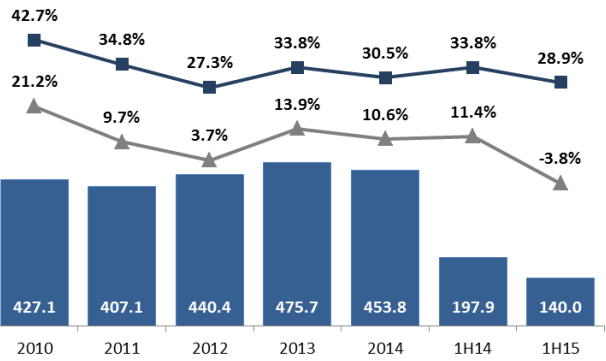
Business Units' Results



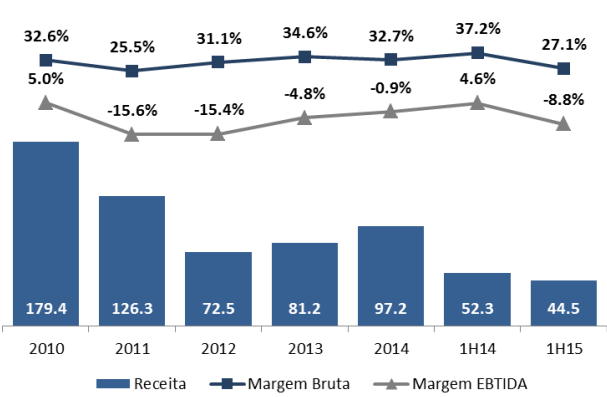
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Sales	Quarter							
	3Q13	4Q13	1Q14	2Q14	3Q14	4Q14	1Q15	2Q15
Machine Tools (units)	400	487	276	307	361	428	221	146
Plastic Machines (units)	50	62	54	42	43	45	44	28
Rough and Machined Cast Iron Parts (ton)	4,991	4,475	3,731	3,571	4,167	3,378	3,807	4,060

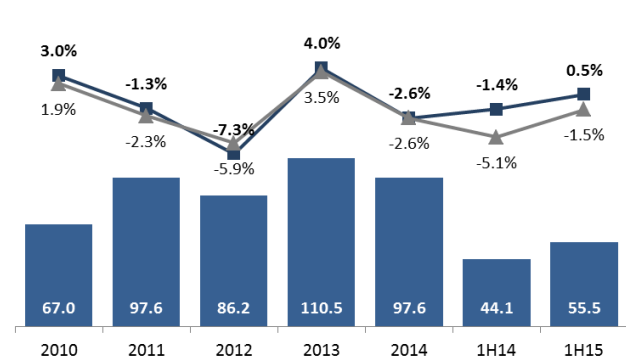
Machine Tools



Plastic Machine



Rough and Machined Cast Iron Parts



■ Receita ■ Margem Bruta ▲ Margem EBTIDA

Cash Position



Cash and Cash Equivalent – R\$ million – 06/30/2015

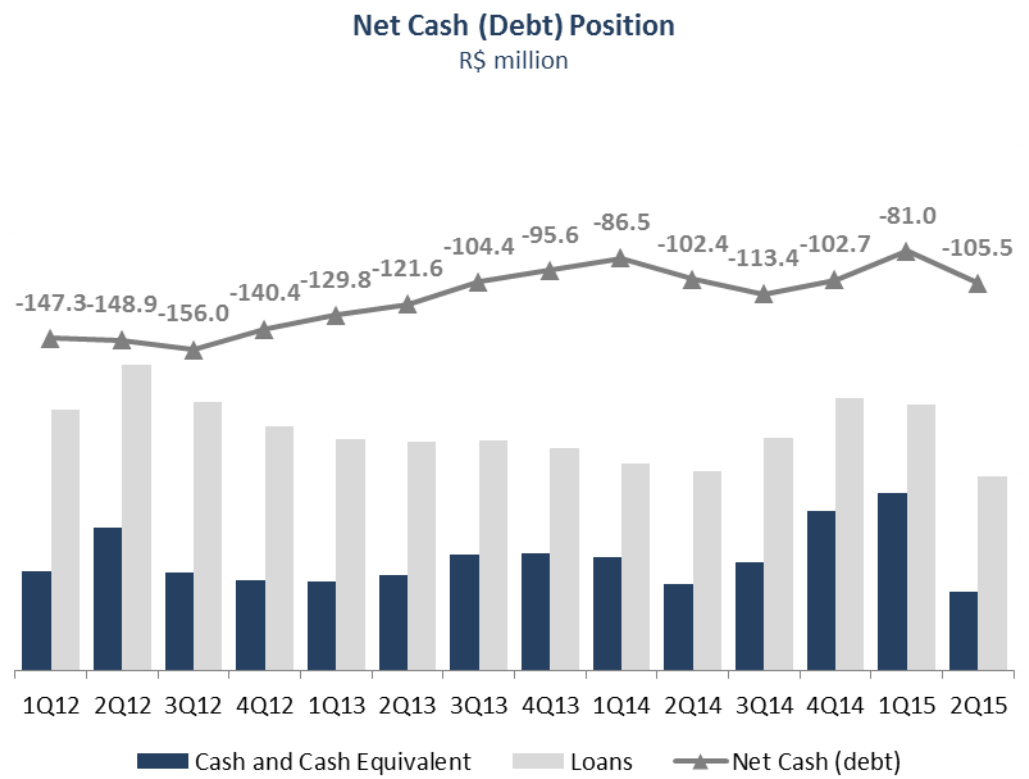
	Amount
Bank Deposit Certificate (CDB)	41.3
Financial Investment with Bonds	1.8
Financial Investment in foreign currency	5.8
Banks	23.1
Total	72.0

Net Debt = 105.5

Loans* – R\$ million – 06/30/2015

	Amount
2015 (6 months)	21.4
2016	47.5
2017	77.6
2018	10.6
2019 and afterwards	20.4
Total	177.5

(*) without Finame Manufacturer





Income Statement B+W

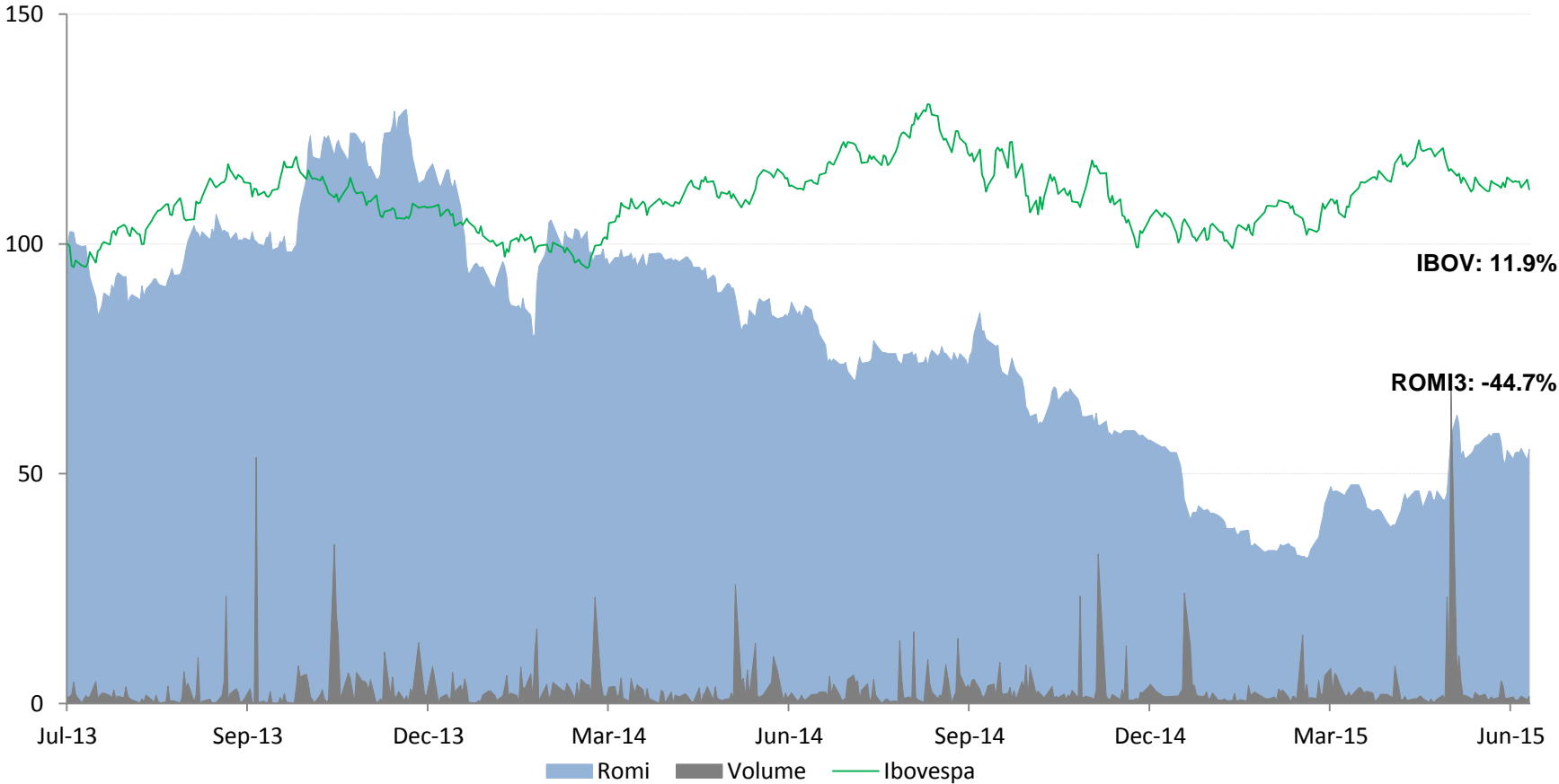
(€ 000)

	2Q14	1Q15	2Q15	Chg 2Q15/1Q15	Chg 2Q15/2Q14	YTD 2014	YTD 2015	Chg 2015/2014
Net Operating Revenue	5,373	2,167	5,894	172.0%	9.7%	12,915	8,061	-37.6%
Cost of Goods Sold	(4,237)	(2,613)	(5,089)	94.8%	20.1%	(10,139)	(7,702)	-24.0%
Gross Profit	1,136	(446)	805	-280.5%	-29.1%	2,775	359	-87.1%
<i>Gross Margin %</i>	<i>21.1%</i>	<i>-20.6%</i>	<i>13.7%</i>			<i>21.5%</i>	<i>4.5%</i>	
Operating Income (Expenses)	(1,905)	(1,453)	(2,210)	52.0%	16.0%	(3,810)	(3,663)	-3.8%
Selling expenses	(572)	(268)	(503)	87.5%	-12.0%	(1,156)	(772)	-33.2%
General and administrative expenses	(1,333)	(1,185)	(1,706)	44.0%	28.0%	(2,654)	(2,891)	9.0%
Operating Income before Financial Results	(769)	(1,899)	(1,405)	-26.0%	82.8%	(1,035)	(3,304)	219.4%
<i>Operating Margin %</i>	<i>-14.3%</i>	<i>-87.6%</i>	<i>-23.8%</i>			<i>-8.0%</i>	<i>-41.0%</i>	
Financial Results, Net	(73)	(176)	(10)	-94.2%	-86.0%	(186)	(186)	0.1%
Operating Income	(841)	(2,075)	(1,415)	-31.8%	68.1%	(1,221)	(3,490)	185.9%
Income tax and social contribution	-	600	409	-31.8%	100.0%	-	1,009	100.0%
Net income	(841)	(1,475)	(1,006)	-31.8%	19.5%	(1,221)	(2,481)	103.3%
<i>Net Margin %</i>	<i>-15.7%</i>	<i>-68.1%</i>	<i>-17.1%</i>			<i>-9.5%</i>	<i>-30.8%</i>	
EBITDA	(465)	(1,477)	(853)	-42.2%	83.3%	(455)	(2,330)	412.5%
Net income / loss	(841)	(1,475)	(1,006)	-31.8%	19.5%	(1,221)	(2,481)	103.3%
Income tax and social contribution	-	(600)	(409)	-31.8%	100.0%	-	(1,009)	100.0%
Financial Results, Net	73	176	10	-94.2%	-86.0%	186	186	0.2%
Depreciation	303	423	552	30.5%	82.0%	580	974	68.0%
<i>EBITDA Margin %</i>	<i>-8.7%</i>	<i>-68.1%</i>	<i>-14.5%</i>			<i>-3.5%</i>	<i>-28.9%</i>	



Share Performance ROMI3 vs, Ibovespa

From 07/01/2013 to 06/30/2015

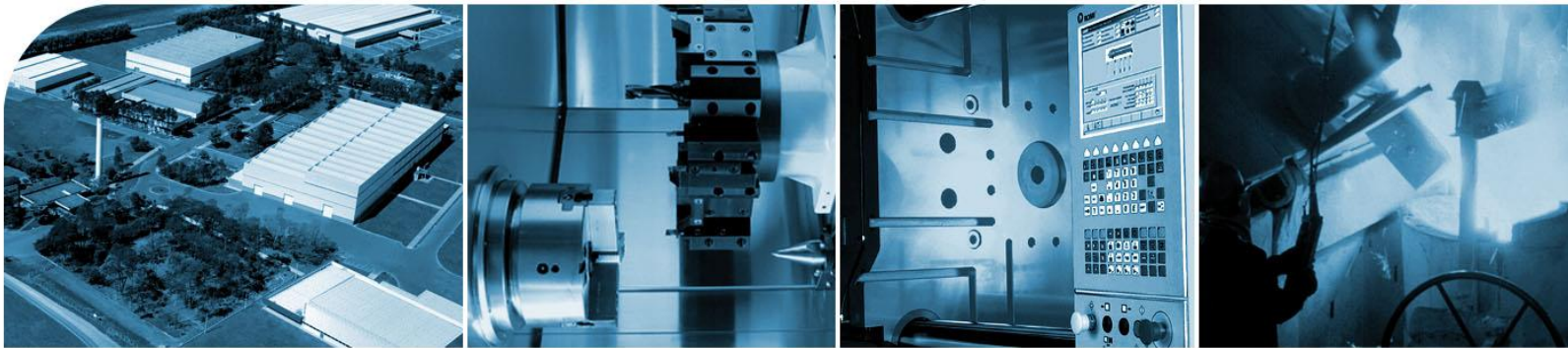


Source: BM&FBovespa



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