

DID YOU KNOW?



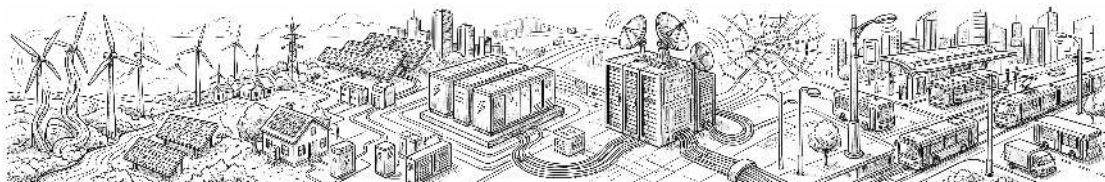
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MANAGEMENT

EV Coverage (India)

- **Bajaj Auto Ramps Capacity on Surging EV Demand:** Bajaj Auto will raise annual capacity from **6.25 lakh** to **7.75 lakh** units in **6-9 months** on EV, premium motorcycle and three-wheeler demand. Exports hit a record **7.8 lakh** units (**+41% YoY**). Chetak crossed **1 million** scooters (**23%** share); output, constrained at **40,000** versus a **60,000** target, rises to **80,000** monthly by Q4, making EVs margin-accretive. Three-wheelers logged a record **1.62 lakh** units (**+13%**), with **90%** CNG and **32%** e-3W shares; spares crossed **₹2,000 crore** (**+15%**).
- **Hero MotoCorp Q2 Profit Rises 42%:** Hero MotoCorp reported a **42.4%** year-on-year rise in consolidated net profit to **₹1,861.33 crore** for...





... Q2 FY27, with revenue up **22.5%** to **₹14,970.50 crore**. Scooter and EV sales drove growth: combined ICE and electric scooter dispatches rose **47%** to **2.40 lakh units**, while VIDA retail sales surged **76%** to **66,531 units**. The firm entered Germany as its **54th** market and announced over **₹3,200 crore** of investment in Andhra Pradesh.

- **JSW Greentech Deploys 100 Electric Tractor Trucks:** JSW Greentech has deployed **100** AMPSTAR 4x2 55-tonne electric tractor trucks at JSW Cement's Vijayanagar facility, moving clinker and slag along a **~330-km** Nandyal-Vijayanagar corridor, handling **~1.25 lakh tonnes** of cargo monthly. JSW Eco-Mobility will provide Battery-as-a-Service via **4** battery-swapping stations. The trucks deliver **430 kW** peak power and **2,600 Nm** torque. The operation is expected to save **~4.5 crore litres** of diesel and avoid **~6,250 tonnes** of CO₂ emissions. JSW Greentech's upcoming **90-acre** Maharashtra facility targets **15,000** electric buses and trucks annually.
- **Montra Electric Opens New Guwahati Dealership in Assam:** Montra Electric expanded its Northeast India presence with a new electric three-wheeler dealership in Guwahati, Assam, operated by SK GROUP X. The facility offers sales, service, and spare parts for the **Super Auto** passenger vehicle and **Super Cargo** carrier models. This addition builds on the company's existing regional network of **11 outlets** and **35 service touchpoints** developed over the past **two years**, targeting Assam's rapidly growing electric three-wheeler market.

EV Coverage (Global)

Source: Electrek, InsideEVs, CleanTechnica, ET Auto, EV Reporter, Autocar Pro (October 28, 2026)

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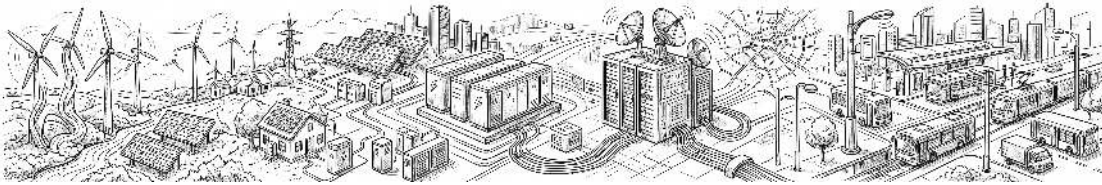
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- **EIA Projects Renewables to Surpass Gas Capacity:** EIA data shows **U.S.** renewables will grow from **37.7%** to **40.4%** of generating capacity, surpassing natural gas. Renewables generated **10.2%** more electricity year over year through August **2026**, led by utility-scale solar (up **20.0%**) and wind (up **7.8%**). Coal output fell **8.7%**. By **August 2027**, utility-scale solar will add **44,603.1 MW**, and battery storage will rise **43.7%** to **77,753.2 MW**, while fossil fuel capacity declines by **1,997.0 MW**.
- **Tesla's Rocket-Shaped Robotaxi Map Criticized as Misleading:** Tesla's expanded Houston Robotaxi geofence, shaped like a rocket, includes downtown areas where pickups are unavailable, per Robotaxi Tracker's Ethan McKanna. He cited a quoted trip of **~40 minutes** to travel just two blocks, likely avoiding downtown railroad crossings. Despite criticism, he praised driving quality over Waymo. Separately, Waymo's Orlando service area shrank **10 square miles (8.4%)** to **109 square miles** after airport drop-offs proved unavailable.
- **Tesla Confirms Vietnam Entry Against VinFast:** Tesla has confirmed its entry into Vietnam with hiring for **5** roles, including a charging project developer, signaling Supercharger plans. It registered Tesla Motors Vietnam LLC on **September 11** with charter capital of **77.7 billion dong (~\$3 million)**. Tesla faces VinFast's **36%** market dominance (**177,697** deliveries versus **175,136** from its next **5** competitors combined). Tailwinds include Vietnam's EV registration fee exemption through **2030**, but high import tariffs and V-Green's **\$380 million** charging network buildout remain hurdles.

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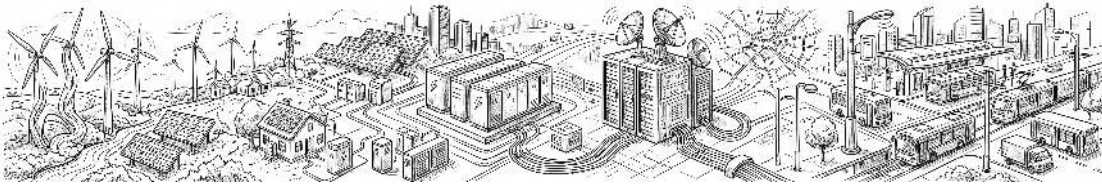
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- **Tesla Semi Fire Shuts Freeway Without Crash:** A Tesla Semi caught fire on Interstate 880 in Hayward, California, with no crash, closing the freeway for about **10 hours** amid hazardous smoke warnings. It is the second Semi fire in two years, following an August **2024** incident investigated by the NTSB. With volume production recently starting and major orders like WattEV's **370** trucks and a **2,500-truck** ZET SCALE deal, the battery cause remains under investigation while Tesla has not commented.
- **South Korea Arrests 80 Tesla Owners Over FSD Jailbreaks:** Seoul Police have arrested **80** Tesla owners for illegally unlocking Full Self-Driving using third-party activation devices from Europe or China, or self-made software. Only U.S.-built models like the Model S, Model X, and Cybertruck are FSD-compliant under Korean safety regulations, leaving Chinese-built Model Y and Model 3 owners without access. Violations of the Motor Vehicle Management Act carry up to **2 years** in prison or fines of **\$15,000**. Used American Teslas command premiums of up to **50%**, pushing buyers toward Chinese-built units.
- **Tesla Wheel Covers Deliver Style Not Range:** A real-world test by Gjeebs found that Haloblk disc wheel covers for Teslas offer only a marginal range benefit, adding just a few miles on a full charge after extrapolating a **20-mile** test loop, an improvement easily erased by a headwind. The covers, starting at **\$210** for a full set, are valued for aesthetics rather than efficiency. Users are advised not to exceed **110 mph** or use them on the track, as Tesla already includes disc covers on the Cybercab.

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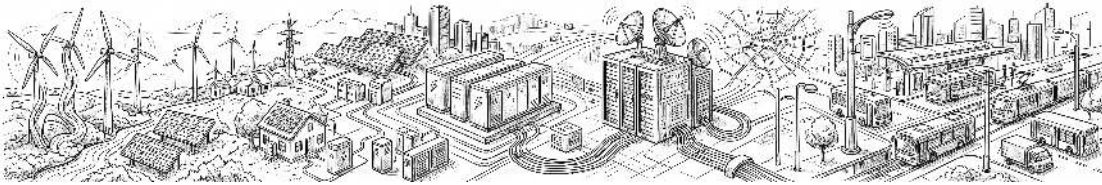
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- **Waymo Expands Robotaxi Coverage Across Five Cities:** Waymo is adding nearly **250 square miles** of driverless coverage across Los Angeles, Nashville, Orlando, San Diego, and the San Francisco Bay Area. It now operates in **15 US metros** with over **500,000 paid rides per week**, after surpassing **1,400 square miles** across **11 cities** in May. The company is mapping **Toronto** for a **2028** launch. Rival Tesla expanded its Houston geofence to about **254 square miles** with only **34 vehicles**, while Waymo logged **3.9 million** rider-only miles weekly in **Q2 2026** versus Tesla's **558,000 miles** — roughly **7x** the gap.
- **BYD Launches Second-Gen Seagull with Blowout Safety:** BYD launched the second-generation Seagull in China, priced from **62,900 yuan (~\$9,500)** with trade-in incentives to **99,900 yuan (~\$15,000)**. The entry-level EV now seats five, features a **140 km/h** tire blowout stability system, and offers two LFP packs — **30.1 kWh** and **39.2 kWh** — delivering **320 km** and **420 km** CLTC range. Flash Charging enables a **10% to 70%** charge in **5 minutes**, with optional roof-mounted LiDAR and God's Eye ADAS.
- **CATL Advances 20 Ah Solid-State EV Batteries:** CATL, holding a **39.9%** global EV battery market share, has entered **20 Ah** trial production of sulfide-based all-solid-state batteries, targeting an energy density of **500 Wh/kg**. Small-scale production is planned for **2027**, with mass production around **2030**. The race intensifies as Toyota targets **2027-2028** with a **1,200 km** range prototype, Samsung SDI plans mass production in the second half of **2027**, and BYD's FinDreams aims for limited batches in **2027**.

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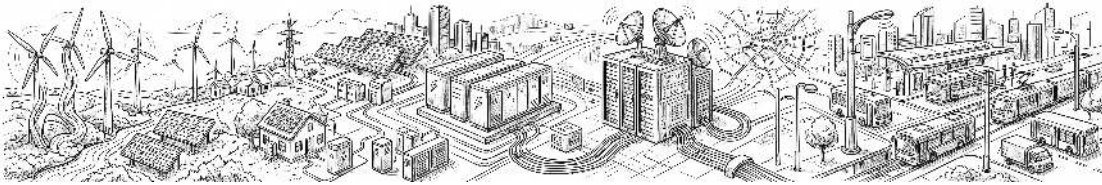
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- **Ford Casts 5,000 Unicasting for Fathom EV Truck:** Ford has produced over **5,000** aluminum unicasting for the Fathom, a **\$28,350** midsize electric pickup launching in **2027**. Each truck uses two castings replacing **146** parts, mirroring Tesla's gigacasting approach pioneered in **2020** with its **6,000-ton** IDRA Giga Press. Castings are made at Shelbyville and shipped to Louisville, where a three-branch assembly line promises **40%** faster production, or **15%** net after automation reinvestment, using Ford's Universal EV Platform.
- **Ford Fathom Cuts Bidirectional Charging Cost Barrier:** Ford's upcoming **Fathom** electric pickup, launching in **2027** at a **\$28,350 MSRP**, features built-in bidirectional AC power that eliminates the need for an external inverter, projected to supply over **10 kW** to a home. The next-generation **Ford Home Power Station** charger is expected to cost about **half** of the first-gen edition, while the **Home Backup Power Panel** will land at least **60%** cheaper, supporting emergency backup and off-peak rate savings.
- **Audi Announces \$4 Billion U.S. Factory in Georgia:** Audi CEO Gernot Döllner, appearing with U.S. President Donald Trump at a Georgia rally, announced a **\$4 billion** factory—Audi's first U.S. manufacturing venture—described as among the brand's largest global production footprints. The move targets competitiveness in the world's second-largest premium automotive market, where Audi's business is currently unprofitable. The plan, which includes potential plug-in hybrid EVs, awaits Volkswagen supervisory board approval and has triggered criticism in Germany over domestic workforce cuts.

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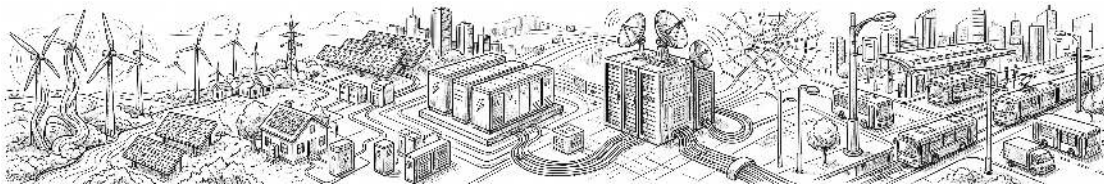
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- **GM Backs Multisensor Autonomy, Criticizes Tesla's Vision-Only:**

General Motors will launch an autonomous highway driving feature in the **2028 Escalade IQ**, using radar, lidar, and cameras. Chief Product Officer Sterling Anderson, who previously led Tesla's Autopilot, called vision-only systems a "weird religious stance that ignores physics." Unlike Level 3 systems, GM's hands-free technology targets true autonomy with a "**graceful countdown**" giving drivers roughly **10 minutes** to take over before the vehicle safely pulls over. Rival Waymo also asserts cameras alone "aren't enough" for full safety.

- **GM Plans Hybrids for Its Biggest SUVs:** General Motors will build hybrid versions of its three-row SUVs — the Chevrolet Traverse, Buick Enclave, and GMC Acadia — at its Lansing, Michigan, factory, per Reuters. This marks a reversal from its all-in EV strategy, first signaled by CEO Mary Barra in early 2024. Hybrids reached **16%** of U.S. car sales in the third quarter, far outpacing EVs at roughly **6%**, as rivals Ford, Toyota, Honda, and Hyundai expand hybrid offerings.

- **Stellantis Posts Modest Q3 Income, Burns Cash:** Stellantis reported Q3 adjusted operating income of **€256 million**, up from **€90 million** a year earlier, on flat revenues of **€37.6 billion**. The turnaround still generated a **€4 billion (\$4.45 billion)** industrial cash outflow. The automaker confirmed it will implement at least **40%** of its **€6 billion** efficiency target by year-end, with **Q4** savings of around **€500 million**. It targets positive cash flow by **2027** and will unveil a new Maserati business plan on **December 10**.

- **VW Battery Recall Expands to Include Audi Models:** Volkswagen's battery recall has grown to **85,402 EVs** globally, now including

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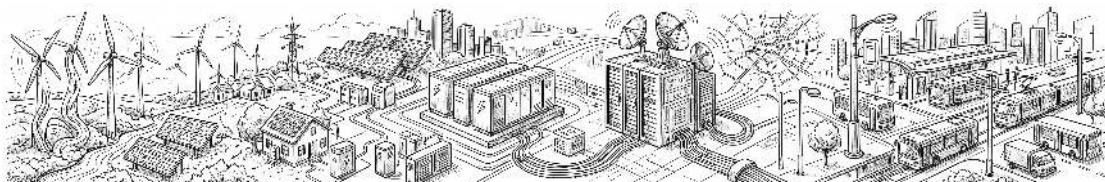


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12,734 Audi Q4 E-Tron and Q4 Sportback E-Tron vehicles. The recall covers ID.3, ID.4, ID.7, ID. Buzz, and Cupra Born models (**2022–2025**) due to thermal propagation risks when charged above **80%**. The NHTSA recall covers **9,048** US Audis (**2024–2025**). No fires or injuries have been reported, and the root cause remains under investigation.

- **Hyundai Climbs to 29th in Interbrand Rankings:** Hyundai Motor's brand value rose **2%** year-on-year to **\$25 billion**, ranking 29th globally and fourth among automakers. Electrified vehicle sales reached **961,812** units in **2025**, up **27%**, including **275,669** EVs and **634,990** hybrids. Q1 2026 sales grew **14.2%** to **242,612** units, representing **24.9%** of total sales. Hyundai plans to equip **~20 million** vehicles with its Pleos Connect software by **2030**.
- **Rivian Van in Walmart Livery Sparks Fleet Speculation:** A Rivian Commercial Van with Walmart+ branding was spotted in Indiana, signaling a potential fleet deal. Walmart's prior EV suppliers collapsed: Canoo filed for bankruptcy in **January 2025**, and GM killed BrightDrop production. Amazon's original **100,000**-van order exclusivity ended in **November 2023**, with over **40,000** vans now on the road. Rivian stock rose over **3%**, days before **Q3 2026** results on **October 29**. Its RCV models start at **\$79,900**.
- **Chinese Used EVs Bypass Europe's Tariff Wall:** China EV Marketplace reported a **290%** surge in used car exports to **Europe**, shipping **7,900** vehicles to the **EU** by **September**. Buyers bypass import duties of up to **45.3%**, as used EVs over **6,000 km** incur only **10%** tariffs. The platform lists over **2,600** cars, from **BYD**, **Nio**, **Xiaomi**, and **Zeekr**, priced between **\$4,000** and **\$120,000**. A new **EU**

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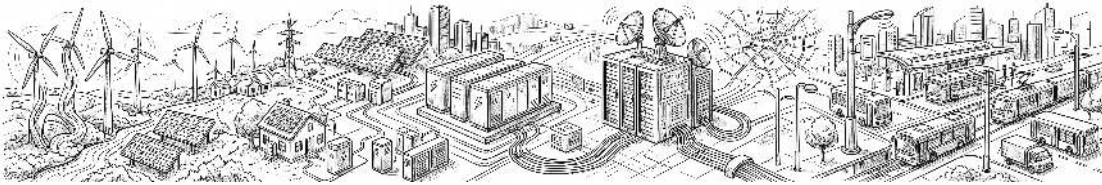
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quota of **350,000** Chinese plug-in hybrids is also driving used-market demand.

- **Kia PV5 Transformed into Fully Electric Campervan:** UK-based Wellhouse Leisure has unveiled the Kia PV5 i-Camper, built on the PV5 Cargo Plus. The **4.69 m** van features two double beds, a full kitchen with a **42 L** refrigerator and two induction burners, plus a **200 W** solar panel. The PV5 Plus Long Range uses a **71.2 kWh** battery delivering **247 miles** WLTP range, charging **10% to 80%** in roughly **30 minutes**. Priced from **£63,000 (~\$84,000)**, it leverages Kia's E-GMP.S skateboard platform; the PV5 is already Europe's top-selling small electric van.
- **Bosch Upgrades Active Line Plus E-Bike Motor:** Bosch unveiled its next-generation Active Line Plus motor delivering up to **600 watts** peak power, **60 Nm** torque, and **340%** pedal assistance for Class 1 e-bikes limited to **20 mph (32 km/h)**. A new two-stage gearbox cut volume by **17%** and weight by **1.1 lb (0.5 kg)**, bringing the unit to **~6 lb (2.7 kg)**, using **40%** recycled aluminum. The ecosystem adds a **720 Wh** PowerTube battery (**8.6 lb/3.9 kg**), a **65%** smaller LED Controller, and Bluetooth theft tracking. Trek's Marlin+ will debut the motor in North America.
- **E-Motiv to Unveil Two-Speed Electric Motorcycle at EICMA:** British firm E-Motiv Shift Systems will debut a retro electric motorcycle demonstrator, **Demo 1**, at **EICMA in Milan from November 3-8**, featuring a seamless two-speed powershift transmission that maintains uninterrupted torque during shifts. Developed through a **£1 million** UK government-funded project with BSA, the University of

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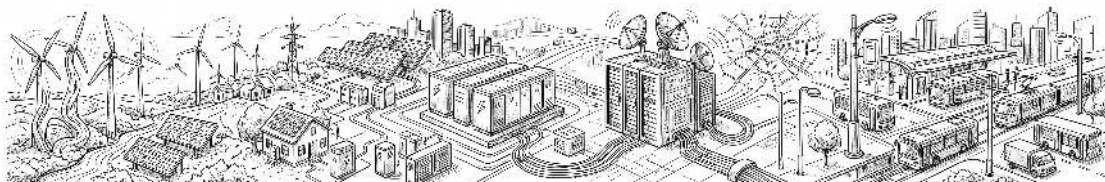
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Bath, and IAAPS, the technology traces back to the Zeroshift system used in Aprilia's **2015** MotoGP bikes. Real-world testing is scheduled for **early 2027**, promising improved acceleration and efficiency over single-speed drivetrains.

- **Jackery Halloween Sale Drops Solar Bundle Prices:** Electrek's midweek green deals feature Jackery's Halloween Sale through **November 3** with up to **\$2,060** off. The HomePower 2000 Plus v2 **2,048Wh** station with 2x **200W** panels is **\$1,479**, down from **\$1,839**. Yozma's new IN 11 electric dirt bike hits **\$1,399** with a free **\$299** gift box. Tenways' CGO600 Pro e-bike returns to **\$1,499**, and Anker SOLIX S5000 launch deals offer up to **\$2,150** in savings.

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