

ROBO Index 3Q25 Commentary

As of September 30, 2025

The ROBO Global Robotics and Automation Index saw +9% performance during the third quarter with eight of the eleven subsectors positive. This quarter saw significant strength, recovery, and impact of burgeoning new markets impact in core ROBO subsectors **Manufacturing & Industrial Automation**, **Logistics** and **Autonomous Systems**.

Manufacturing & Industrial Automation (+21.1) saw strong performance from **Celestica** (+57.8%), **Teradyne** (+49.5%), and **Hon Hai Precision** (+34.1%) which are each seeing their respective end markets strengthening.

Actuation (+12.8%) saw strong growth primarily through exposure to power systems in data centers and overall global electrification, led by **Delta Electronics** (+96.4%) and **Han's Laser** (+70.0%). **Autonomous Systems** (+24.8%) continuing to grow in size as a subsector, now 6.5% weighting, saw strong performance from next-gen mobility players **Joby** (+51.7%) and more recent additions, **Tesla** (+39.5%) and China-based **XPeng** (+29.7%). Smaller subsectors, **Food & Agriculture** and **Healthcare**, lagged as the two have been the most hit by current and/or expected tariff impact.

Overall, multiple signals are pointing towards continued strength to finish out 2025 and even stronger conviction towards 2026 pull-through, as seen by order upticks and positive commentary from System Integrators such as **ABB** (+21.2%), **Siemens** (+5.4%) and **Rockwell Automation** (+5.5%). International growth (ex-China) continues to pan out as geo diversification objectives remain in early stages for the robotics industry.

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