1 Highlights
## First-half 2008 key figures

<table>
<thead>
<tr>
<th></th>
<th>Amount in €m</th>
<th>Change H1-2008/H1-2007</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Actual</td>
</tr>
<tr>
<td>Sales</td>
<td>22,141</td>
<td>+1.7%</td>
</tr>
<tr>
<td>Operating income</td>
<td>2,005</td>
<td>-4.2%</td>
</tr>
<tr>
<td>Recurring net income*</td>
<td>1,101</td>
<td>+3.2%</td>
</tr>
</tbody>
</table>

* excluding capital gains on disposals and asset write-downs
** average exchange rates for first-half 2007

A solid performance despite a high comparison basis
Challenging economic conditions

> Continued **downturn** in **residual construction** in the **US**

> **Slowdown** in **Europe in the 2\(^{nd}\) quarter**, amplified by a high comparison basis (H1 2007)

> Ongoing **strong growth momentum** in **Asia and emerging countries**

> **Good level** of **industrial activity** worldwide

> **Volatile and difficult macro-economic climate**: inflation (energy, commodities), financial crisis, weak dollar
Results hold firm in first-half 2008

Despite a high comparison basis (first-half 2007)

- Organic growth of **2.2%** and fresh increases in sales prices (up **3.1%**)

- **Operating income** at constant exchange rates* close to the high level achieved in first-half 2007 (down **2.3%**)

- **Moderate growth in recurring net income**** (up **3.2%**)

- High level of cash flow (€**1.9bn**), and further improvement in working capital

- **Solid financial structure**

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* based on average exchange rates for H1-2007
** excluding capital gains and losses, exceptional asset write-downs and Flat Glass fines
Priorities for action

1. Strong capacity to adapt to economic climate
   - Accelerated roll-out of structural cost savings programs as announced in 2007 (€85m in 2008)
   - Enhanced competitiveness drive (€215m of cost savings in 2008 - €350m on a full-year basis)
   - Management of prices, capacity and financing

2. Search for growth opportunities stepped up
   - Increasingly fast-paced development in emerging countries
   - Ongoing innovation efforts, particularly in the areas of energy and environmental protection
   - Targeted acquisitions in Construction markets (swift integration of Maxit, almost €600m in bolt-on acquisitions)
Group Results and Operating Performance

A. Group
B. Sectors
C. Geographic areas
Sales

€bn

H1-2007 sales exchange rate structure prices volumes H1-2008 sales

21.779 -3.1% +2.6% +3.1% -0.9% 22.141 +1.7%

+2.2% on a like-for-like basis
Organic growth
% change in 2008/2007 sales on a like-for-like basis

<table>
<thead>
<tr>
<th>Period</th>
<th>Volumes</th>
<th>Prices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1-2008/Q1-2007</td>
<td>-1.7%</td>
<td>2.6%</td>
</tr>
<tr>
<td>Q2-2008/Q2-2007</td>
<td>-0.1%</td>
<td>3.5%</td>
</tr>
<tr>
<td>H1-2008/H1-2007</td>
<td>-0.9%</td>
<td>3.1%</td>
</tr>
</tbody>
</table>

Further price increases in Q2
Operating income

€m

<table>
<thead>
<tr>
<th></th>
<th>H1-2006</th>
<th>H1-2007</th>
<th>H1-2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating income</td>
<td>1,815</td>
<td>2,093</td>
<td>2,005</td>
</tr>
<tr>
<td>Operating margin as % of sales</td>
<td>8.8% 11.1% 5.0%</td>
<td>9.6% 12.6% 5.2%</td>
<td>9.1% 12.1% 4.7%</td>
</tr>
<tr>
<td>Total Group</td>
<td>-2.3%**</td>
<td>9.6%</td>
<td>12.6%</td>
</tr>
</tbody>
</table>

* at constant exchange rates (H1-2006 average)
** at constant exchange rates (H1-2007 average)
Outstanding claims

**Asbestos claims against CertainTeed in the US**

- Approximately **$70m** paid out (trailing 12-month basis) ($73m in 2007 and $83m in 2006) and a further **€37.5m** set aside to the provision ($489m provision at end-June 2008 versus $473m at end-December 2007)

<table>
<thead>
<tr>
<th><em>estimates</em></th>
<th>2007</th>
<th>June 2008 (trailing 12-month basis)*</th>
<th>H1 2007</th>
<th>H1 2008*</th>
</tr>
</thead>
<tbody>
<tr>
<td>New claims</td>
<td>6,000</td>
<td>5,000*</td>
<td>4,000</td>
<td>3,000*</td>
</tr>
<tr>
<td>Claims settled</td>
<td>8,000</td>
<td>7,000*</td>
<td>5,000</td>
<td>4,000*</td>
</tr>
</tbody>
</table>

- **Outstanding claims at June 30, 2008: 73,000*** (74,000 at end-2007)

**Flat Glass**

- February 2005: **anti-trust enquiry** launched by the European Commission (construction and automotive glass)

- March 2008: **€134m** fine paid for **construction glass** (further to European Commission’s ruling of November 2007)

- Proceedings still in progress for **automotive glass**: **provision of €560m** at 12/31/07
## Non-operating items

<table>
<thead>
<tr>
<th></th>
<th>H1-07</th>
<th>H1-08</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating income</td>
<td>2,093</td>
<td>2,005</td>
<td>-4.2%</td>
</tr>
<tr>
<td>Non-operating costs</td>
<td>(776)*</td>
<td>(79)</td>
<td></td>
</tr>
<tr>
<td>Other operating costs</td>
<td>+3</td>
<td>(31)</td>
<td></td>
</tr>
<tr>
<td>Business income</td>
<td>1,321*</td>
<td>1,897</td>
<td>+43.6%</td>
</tr>
</tbody>
</table>

* after €650 provision for Flat Glass fines at 06/30/07

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Net financial expense</td>
<td>(351)</td>
<td>(352)</td>
</tr>
<tr>
<td>Income taxes</td>
<td>(491)</td>
<td>(444)</td>
</tr>
<tr>
<td>Tax rate on recurring net income</td>
<td>33%</td>
<td>29%</td>
</tr>
</tbody>
</table>
Recurring net income*

€m

H1 2006  H1 2007  H1-2008

813 1,067 1,101

+3.2%

Net income

H1 2006  H1 2007  H1-2008

797 465 1,076

> Recurring EPS*: €2.88 (+1.0%)

EPS: €2.81 (+127%)

* excluding capital gains on disposals, asset write-downs and provision for Flat Glass fines
Operating working capital
(€m, as % of sales and in no. of days)

<table>
<thead>
<tr>
<th>'06/30/2005</th>
<th>'06/30/2006</th>
<th>'06/30/2007</th>
<th>'06/30/2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>€m</td>
<td>No. of days</td>
<td>€m</td>
<td>No. of days</td>
</tr>
<tr>
<td>5,625</td>
<td>60d</td>
<td>6,054</td>
<td>54d</td>
</tr>
<tr>
<td>16.6%</td>
<td></td>
<td>15.0%</td>
<td></td>
</tr>
<tr>
<td>6,167</td>
<td>52d</td>
<td>6,234</td>
<td>50d</td>
</tr>
<tr>
<td>14.4%</td>
<td></td>
<td>13.9%</td>
<td></td>
</tr>
</tbody>
</table>

Further advances: -10 days in 3 years
Cash flow from operations (excluding capital gains tax) and Capital expenditure

€m

H1 2006 | H1 2007 | H1 2008
---|---|---
Cash flow | 1,672 | 1,883 | 1,887
Capital expenditure | 811 | 822 | 872

(% of sales) | 8.1% | 8.6% | 8.5%
---|---|---|---
Capital expenditure | 3.9% | 3.8% | 3.9%
Net debt and shareholders’ equity

(€bn)

<table>
<thead>
<tr>
<th>Date</th>
<th>Net debt (€bn)</th>
<th>Shareholders’ equity (€bn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>'06/30/2007</td>
<td>12.0</td>
<td>15.0</td>
</tr>
<tr>
<td>12/31/2007</td>
<td>9.9</td>
<td>15.3</td>
</tr>
<tr>
<td>06/30/2008</td>
<td>13.3</td>
<td>15.4</td>
</tr>
</tbody>
</table>

- Net debt/equity: 80% 65% 86%
- Net debt/EBITDA: 2.2 1.7 2.4
- Interest cover: 6.0 5.9 5.7
Acquisitions and disposals in first-half 2008

> Acquisitions €2,178m

  o/w: Construction Products* €1,567m
  Building Distribution €503m
  Innovative Materials €55m
  Packaging €53m

> Disposals** €77m

* including Maxit for €1,526m
** including sales of non-current assets for €32m
2 Group Results and Operating Performance

A. Group
B. Sectors
C. Geographic areas
Innovative Materials (Flat Glass-HPM) (€m and as % of sales) excluding divested businesses

### Sales

<table>
<thead>
<tr>
<th></th>
<th>H1-2007</th>
<th>H1-2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flat Glass</td>
<td>4,926</td>
<td>4,993</td>
</tr>
<tr>
<td>HPM</td>
<td>2,139</td>
<td>2,123</td>
</tr>
</tbody>
</table>

### Operating income

<table>
<thead>
<tr>
<th></th>
<th>H1-2007</th>
<th>H1-2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flat Glass</td>
<td>2,797</td>
<td>2,885</td>
</tr>
<tr>
<td>HPM</td>
<td>2,123</td>
<td>2,123</td>
</tr>
</tbody>
</table>

### Cash flow from operations & capex

<table>
<thead>
<tr>
<th></th>
<th>Cash flow</th>
<th>Capex</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flat Glass</td>
<td>13.1%</td>
<td>14.1%</td>
</tr>
<tr>
<td>HPM</td>
<td>11.7%</td>
<td>7.6%</td>
</tr>
</tbody>
</table>

- **Like-for-like +3.9%**
- **Flat Glass +4.7%**
- **High-Performance Materials +3.0%**

* at constant exchange rates
**Construction Products** (€m and as % of sales)

- **Sales**
  - **Interior Solutions**:
    - H1-2007: 3,393
    - H1-2008: 3,170
  - **Exterior Solutions**:
    - H1-2007: 2,267
    - H1-2008: 2,835

- **Operating income**
  - **Interior Solutions**:
    - H1-2007: 15.9%
    - H1-2008: 12.0%
  - **Exterior Solutions**:
    - H1-2007: 8.7%
    - H1-2008: 7.9%

- **Cash flow from operations & capex**
  - **Interior Solutions**:
    - H1-2007: 479
    - H1-2008: 314
  - **Exterior Solutions**:
    - H1-2007: 8.7%
    - H1-2008: 7.3%

**Like-for-like**
- **Interior Solutions**:
  - +1.5%
- **Exterior Solutions**:
  - +8.9%

*at constant exchange rates*
Building Distribution  (€m and as % of sales)

Sales

H1-2007: 9,522
H1-2008: 10,039
Increase: +7.7%* (at constant exchange rates)

Operating income

H1-2007: 494
H1-2008: 470
Decrease: -2.7%*

Cash flow from operations & capex

Cash flow: 335
Capex: 129

+1.2% like-for-like

* at constant exchange rates
Packaging (€m and as % of sales) excluding divested businesses

Sales

- H1-2007: 1,723
- H1-2008: 1,733
- +5.0%*

Operating income

- H1-2007: 189
- H1-2008: 233
- +25.8%*

Cash flow from operations & capex

- Cash flow: 259
- Capex: 115
- 15.0%
- 6.7%

* at constant exchange rates

+6.5% like-for-like
Group Results and Operating Performance

A. Group
B. Sectors
C. Geographic areas
Organic growth by geographic area

% change in H1-2008/H1-2007 sales on a like-for-like basis

- France: +2.9%
- Other Western Europe: +0.6%
- North America: -3.4%
- Asia and emerging countries: +11.7%

o/w:
- Scandinavia (10%): +5.8%
- Germany (10%): +3.2%
- UK (10%): -3.8%
- Spain-Port. (6%): -3.4%

% Group total:
- France: 29%
- Other Western Europe: 44%
- North America: 12%
- Asia and emerging countries: 15%
<table>
<thead>
<tr>
<th>Geographic Area</th>
<th>H1-07</th>
<th>H1-08</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>565</td>
<td>576</td>
<td>+1.9%</td>
</tr>
<tr>
<td>Other Western Europe</td>
<td>926</td>
<td>893</td>
<td>-0.5%*</td>
</tr>
<tr>
<td>North America</td>
<td>234</td>
<td>122</td>
<td>-40.8%*</td>
</tr>
<tr>
<td>Asia and emerging countries</td>
<td>368</td>
<td>414</td>
<td>+11.2%*</td>
</tr>
</tbody>
</table>

* at constant exchange rates
Cash flow and Capex by geographic area

(€m and as % of sales)

Free cash flow = Cash flow – Capex
3
Priorities for Action
Significant downturn in global economic climate

- Subprime crisis followed by financial crisis → squeeze on credit and gradual rise in interest rates

- Upward spiral in energy and commodity prices → significant impact on inflation

- Continued decline in outlook for US Construction market

- Gradual slowdown in growth across Europe
  - Abrupt downturn in Construction in the UK and Spain
  - Slowdown in the rest of Europe over the last few months
Priorities for Action

A. Strong capacity to adapt to changes in the economic climate

B. Search for growth opportunities stepped up
Roll-out of structural programs related to new Group strategy

Ahead of schedule

> Summary of objectives

<table>
<thead>
<tr>
<th>Year</th>
<th>Initial</th>
<th>Estimated</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>80</td>
<td>85</td>
<td>180</td>
<td></td>
<td>300</td>
</tr>
</tbody>
</table>

> Savings in H1-2008 and projects for H2-2008

- More than 230 projects launched
- Finance-HR: launch of shared services in all major countries
- IT: optimization of Group infrastructure and ERP skills centers
- €50m in additional purchase savings in full-year 2008 (ongoing centralization drive)
Measures swiftly put in place to address a challenging economic climate

> United States: continuation of restructuring measures implemented since the onset of the Construction crisis
  - Production stopped at 19 sites/lines (14 in 2007, 5 in H1-2008)
  - New measures planned for upcoming months

> UK and Spain: swift reaction to downturn
  - Halt to imports and reduction of factory teams
  - 25 Distribution outlets and 8 plants closed
  - Additional action plans to be launched by the end of 2008

> Other European countries: departure of temporary staff, hiring freeze
Substantial cost savings

> Around 40% of measures already launched at end-June 2008

<table>
<thead>
<tr>
<th>Workforce reductions* (estimated)</th>
<th>2008 impact</th>
<th>Full-year impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>o/w</td>
<td></td>
<td></td>
</tr>
<tr>
<td>US</td>
<td>1,550</td>
<td>2,200</td>
</tr>
<tr>
<td>UK</td>
<td>1,100</td>
<td>1,500</td>
</tr>
<tr>
<td>Spain</td>
<td>270</td>
<td>560</td>
</tr>
<tr>
<td>▶ 40% of measures already launched at end-June 2008</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cost savings (€m) (estimated)</th>
<th>2008 impact</th>
<th>Full-year impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>o/w</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjustments/Productivity</td>
<td>215</td>
<td>350</td>
</tr>
<tr>
<td>Structural programs</td>
<td>85</td>
<td>85</td>
</tr>
<tr>
<td>▶ Implementation costs lower than in the past, since global businesses have already been heavily restructured (Pipe, High-Performance Materials)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Continued productivity efforts

Average productivity gains of around 4% per year for the past 15 years (volumes/workforce, on a comparable structure basis)

Efficiency measures regarding energy consumption

Efficiency measures regarding use of materials:

- Insulation: 22% in 10 years
- Pipe (Natural range): 12% gain in materials
Price management

A stronger operating priority

Further price increases in the 2nd quarter (+3.5%) compared with 1st quarter (+2.6%)

Fresh initiatives planned for H2

Numerous projects for optimizing pricing policy
Improved product mix and added value

> **Flat Glass**
- Enhanced product mix (value-added products: >2/3 of business sector sales)

> **HPM**
- Gain of 5 pts in gross margin (2003-2008)
- PPL: 30% new products each year

> **Gypsum**
- Systems and solutions multiply added value by 1.5 in Europe

> **Distribution Filières**
- 25% growth in distributor brand sales in Plumbing-Heating business (H1-08 vs H1-07)
- Specialist Filières: >40% of sector outlets and sales

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4mm glass in Europe as % of SG Glass sales

- 1997: 23%
- 2007: 13%
- 2013: <10%
Capacity management

> **Selective** capital expenditure and acquisitions

> **Capacity optimization:**

- 100% of new Flat Glass capacity in emerging countries
- Saturation of Pipe capacity (Brazil, France, China)
- Capacity streamlining in the US

Cash management

> Continuing high level of **free cash flow**

> **Working capital** gains

> **Solid financial structure** (gearing ratio ~80% and BBB+ / Baa1 rating)

> Consistent **dividend** policy
Priorities for Action

A. Strong capacity to adapt to changes in the economic climate

B. Search for growth opportunities stepped up
Accelerated development in emerging countries

Almost 50% of growth capex in H1-2008

Sales (€bn) in emerging countries

<table>
<thead>
<tr>
<th>Year</th>
<th>2000</th>
<th>2004</th>
<th>2007</th>
<th>2008 est</th>
<th>obj. 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2.5</td>
<td>3.6</td>
<td>6.9</td>
<td>7.7</td>
<td>33%</td>
</tr>
<tr>
<td>%</td>
<td>11%</td>
<td>17%</td>
<td>24%</td>
<td>26%</td>
<td></td>
</tr>
</tbody>
</table>

CAGR 15%

Operating income (€m) in emerging countries

<table>
<thead>
<tr>
<th>Year</th>
<th>2000</th>
<th>2004</th>
<th>2007</th>
<th>2008 est</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>125</td>
<td>430</td>
<td>800</td>
<td>&gt; 880</td>
</tr>
<tr>
<td>%</td>
<td>11%</td>
<td>24%</td>
<td>26%</td>
<td>33%</td>
</tr>
</tbody>
</table>

CAGR 28%

% in emerging countries (excl. Building Distribution)
Emerging countries: Highlights (first-half 2008)

**Eastern Europe**

- **Poland** (CAGR: 25% since 1997)
  - Start-up of 2nd float line

- **Romania**
  - Construction of coated glass facility

- **Baltic countries**
  - Acquisition of Famar Desi, no. 1 builder’s merchant in Estonia

- **Russia** (CAGR > 40% since 2004)
  - Acquisition of gypsum reserves
  - Acquisition of bottles & jars specialist

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**Latin America**

- **Mexico**
  - New multi-functional high-performance plastics plant

- **Colombia**
  - Launch of float line (Flat Glass)
  - Acquisition of Insulation company

- **Brazil** (CAGR > 30% since 1996)
  - Acquisitions in Mortars and Building Distribution

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*Slight growth due to high comparison basis*

**Very strong momentum**

+17% like-for-like
Emerging countries: Highlights (first-half 2008)

Asia

Vigorous growth +22% like-for-like

> India (CAGR: 25% for the past 10 years)
  . Flat Glass: launch of a 3rd float line
  . 4th Abrasives plant

> China
  . Pipe: (CAGR ~ 40% since 2002), new capacity
  . New solar glass line
  . Start-up of new Abrasives plant and investments in plastic films

> Vietnam
  . Leader in plasterboard

Africa and Middle-East

New regional bases for Group businesses

> Egypt: construction of new float line

> Algeria: acquisitions in plaster industry

> Abu Dhabi: construction of plasterboard plant

> Mauritania: supply of pipe systems (170 km)
European regulations to be significantly reinforced by 2020

Relative trends in thermal regulations (2000-2020) basis of 100 in 2000

-25%
-50%

RT 2005
RT 2010
50 kWh/m²/year
Positive energy

Poland
Finland
Denmark
Netherlands
UK
Germany
France
Growing profitability of energy-driven renovation projects

Individual house

- 100 m², fuel heating
- Built before 1975
- Renovation work: €5,000 - €15,000

Improvement: G → D

Profitability of insulation solutions based on energy costs

Source: PROMODUL calculation
All Group business sectors actively partnering market trends

> Regulations
- Direct presence in public institutions and professional associations
- Institutional partners: Fraunhofer Institute, CSTB, ADEME, CAH

> Research

> Training
- Training for sales teams: 30,000 employees trained across Europe in 2008
- Training for customers and business referral agents: France, Germany, Sweden, US, etc.
Solar technology: Saint-Gobain present across all ranges

Involved in each stage of the value chain

> Photovoltaic
- Upstream components: quartz crucibles, abrasive grains, special refractories
- Components: front glass and films, back glass and other materials
- Modules: thin film CIS technology
- Systems: photovoltaic tiles
- Distribution

> Concentrated solar power
- Parabolic mirrors
- Ceramic wedges

> Thermal solar
- Extra-clear glass
Solar technology: ambitious growth plan for an attractive market

> Sharp rise in demand for glass
  - across all technologies
  - CAGR 08-13: 35%

> Saint-Gobain’s target: more than €2bn by 2013

> Creation of Saint-Gobain SOLAR
Targeted acquisitions in “Habitat” market

> Maxit: successful integration
- Cost synergies in excess of targets

Cost synergies: €36m, versus initial forecast of €30m

- New organization of Mortars in each country since end-March 2008
- Merger of 50 legal structures (countries) in 2008-2009 and 80 specific action plans

> Close to €600m in bolt-on acquisitions (54 acquisitions, €930m in full-year sales)
2008 Outlook and Objectives
Ability to stand firm in challenging climate

Saint-Gobain’s end markets

New construction* 34%
- France: 29%
- West. Eur. excl. France: 44%
- North America: 12%
- Asia & emerg. coun.: 15%

Renovation/Infrastructure** 45%
- France: 15%
- West. Eur. excl. France: 21%
- North America: 4%
- Asia & emerg. coun.: 5%

Other 21%
- France: 4%
- West. Eur. excl. France: 8%
- North America: 5%
- Asia & emerg. coun.: 4%

* Residential: 24%
  Non-residential: 10%
** Renovation: 36%
  Infrastructure: 9%
H2-2008 outlook

I. Construction markets (Europe + US)
   **Western Europe**: moderate decrease
   Slowdown in France, Germany and Scandinavia
   Significant downturn in Spain and the UK
   
   **North America**: no improvement in sight

II. Other markets (Europe + US)
   **Industry & Household consumption**: Satisfactory in Europe and the US

III. Asia & emerging countries
   Continued strong momentum
H2-2008 outlook for Saint-Gobain’s business sectors

> Flat Glass:
  - market should hold firm, thanks chiefly to emerging countries
  - rise in energy, transport and commodity prices should have greater impact on operating margin

> High-Performance Materials (HPM):
  - ongoing profitable growth
  - healthy order book

> Construction Products (CP):
  - moderate decrease in Europe, strong growth in emerging countries
  - continued difficulties in the US
  - further advances in Pipe and Mortars

> Building Distribution:
  - slowdown in organic growth
  - slight fall in operating margin (H2-08/H2-07)

> Packaging:
  - fresh advances in sales and profitability
2008 objectives

> Recurring net income* and operating income (at constant exchange rates**) close to 2007 figures

> Ongoing high level of free cash flow and solid financial structure

* excluding capital gains and losses on disposals, asset write-downs and Flat Glass fines
** average exchange rates for 2007
1st Half 2008 Results

Analysts-Investors Meeting

July 2008