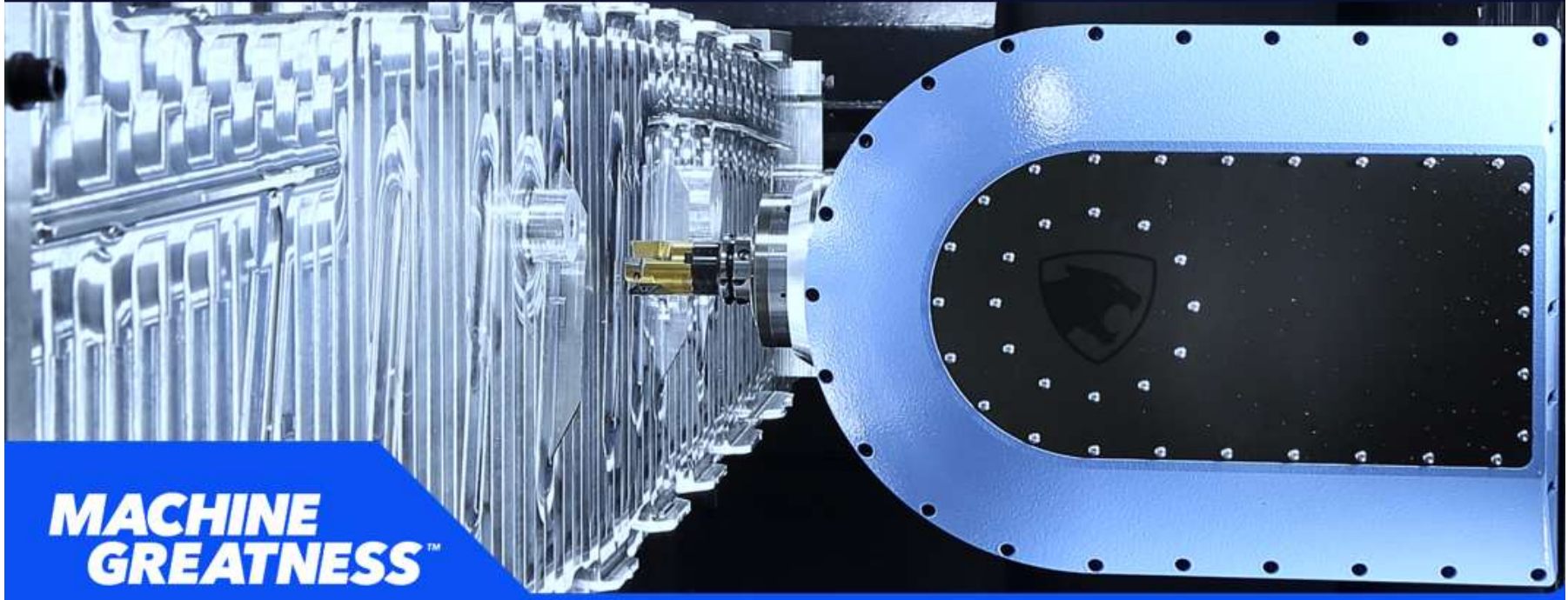


DN Solutions



**MACHINE
GREATNESS™**

Historical Milestones



- Start Daewoo Group's Daewoo Heavy Industry Machine Tools business

1976.7.1



- Begin independently developing and exporting CNC lathes

1980



- Launch of the DIMF

1997

DIMF

(DN Solutions International Machine Tool Fair)

- A corporate-level machine tool fair designed to promote Doosan Machine Tools' products and technologies.
- A biennial event held at Doosan Machine Tools' Changwon factory, Korea since 1997.
- A 20-year-old MT fair that has attracted a cumulative total of 30,000 visitors from home and abroad.
- The 13th DIMF held in 2021 (Sep 13-17)
 - Virtual exhibition was held & 1,400 visitors

2003



- Construction of a factory in Yantai, China.
 - Launch of the China DIMF(2005¹⁾)
 - Cumulative production exceeded 24,000 units (2020)

2005

- Doosan Group (Doosan Infracore Machine Tools BG)

2007



- Integration of the Machine Tools Division of Doosan Mecatec

2016.5.2



- Launch of Doosan Machine Tools Co., Ltd.
 - A new company independent of Doosan Group (an affiliate of MBK Partners)

2018



- Expansion of production Capacity
 - Korea: Expansion of 2nd Factory(Seongju) (production of large machine tools)

2022

DN AUTOMOTIVE

DN SOLUTIONS

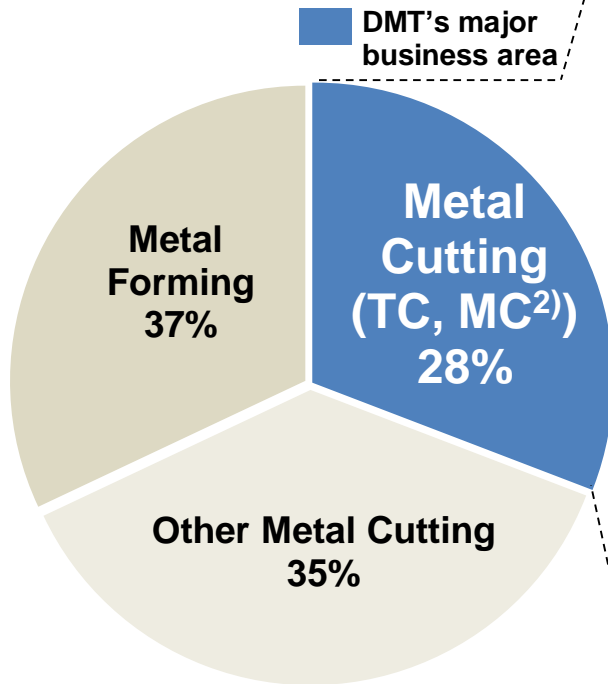
- Change of Shareholder
 - DN Automotive²⁾
- Change of Company Name
 - DN Solutions

• Held in even-numbered years from the 2nd (2nd in 2008, 5th in 2016)'

• Change of Company name : DTR Automotive → DN Automotive

Business Areas

Global machine tool market¹⁾
(US\$ 87.94 billion in)



DN Solutions,
A specialized machine tool manufacturer equipped with a full TC/MC line-up³⁾ developed with its own technological process!

HQ: 435 models
China: 69 models

Turning Center

HQ: 291
China: 40

Horizontal



196 (32)

Vertical



37 (8)

Multi-tasking



58 (0)

Machining Center

HQ: 144
China: 29

Horizontal



27 (14)

Vertical



103 (15)

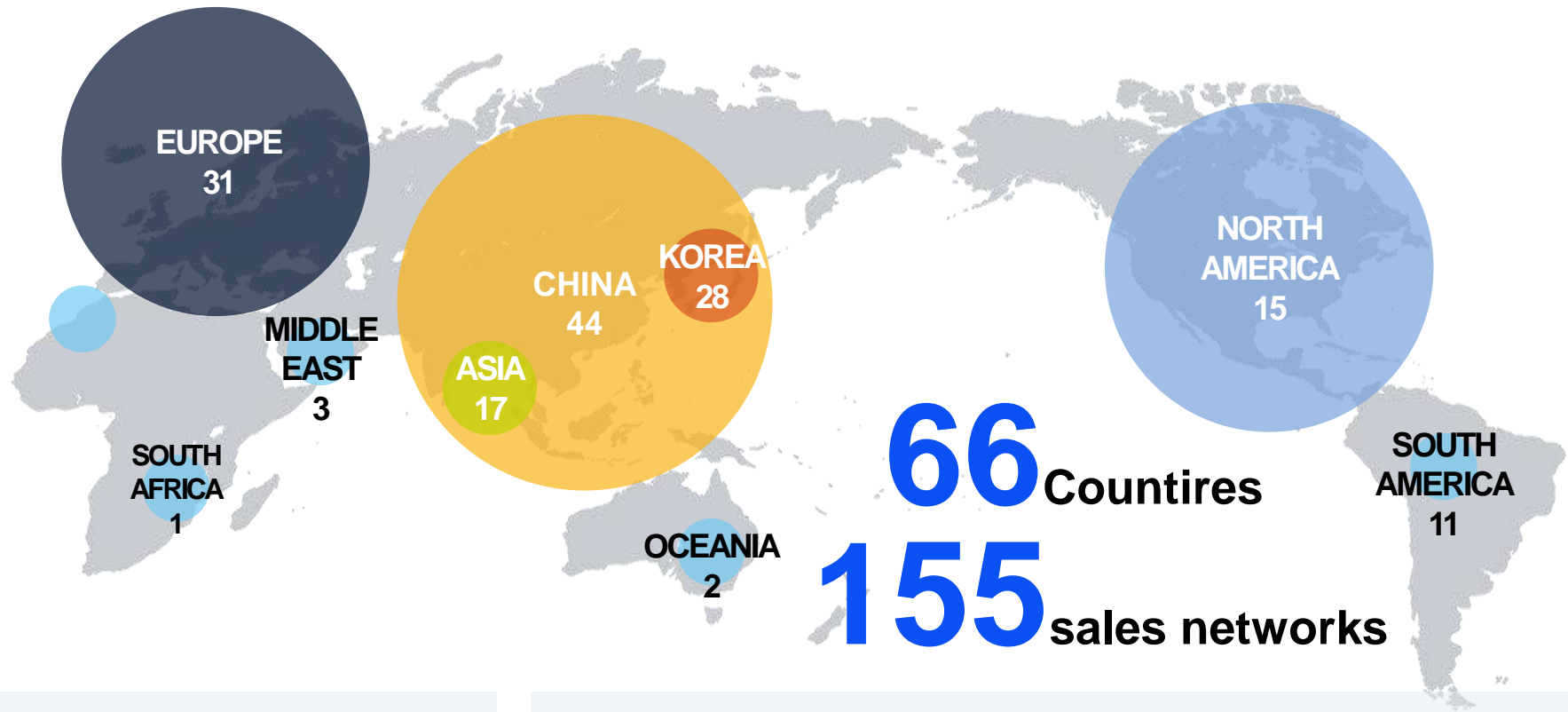
5 axis



14 (0)

() China

DN Solutions Sales Network



Domestic

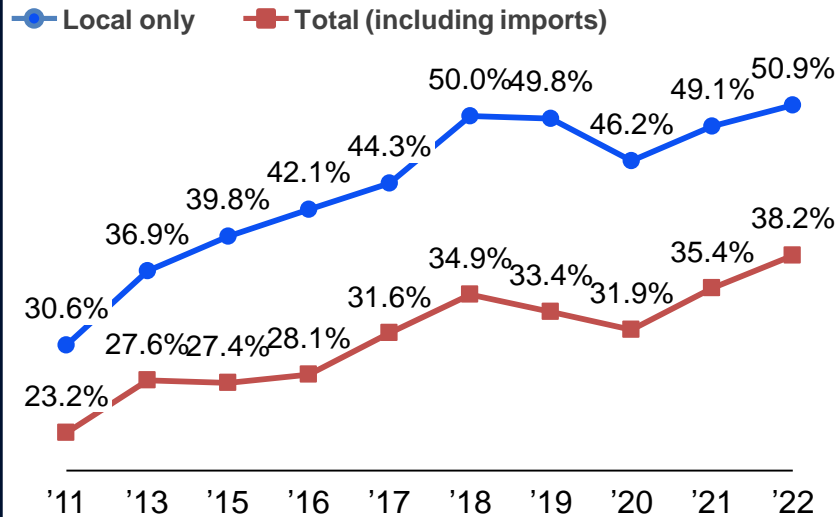
- Sales : 6 branches, 28 dealers
- After-sales service
 - 2 technical centers
 - 52 service posts

Overseas

- Sales
 - 4 subsidiaries (USA, China, Germany, India)
- China : 5 branches, 4 posts, 44 dealers
- Service
 - 49 technical centers
 - 148 service posts

Global Status

Domestic M/S: No.1⁽¹⁾

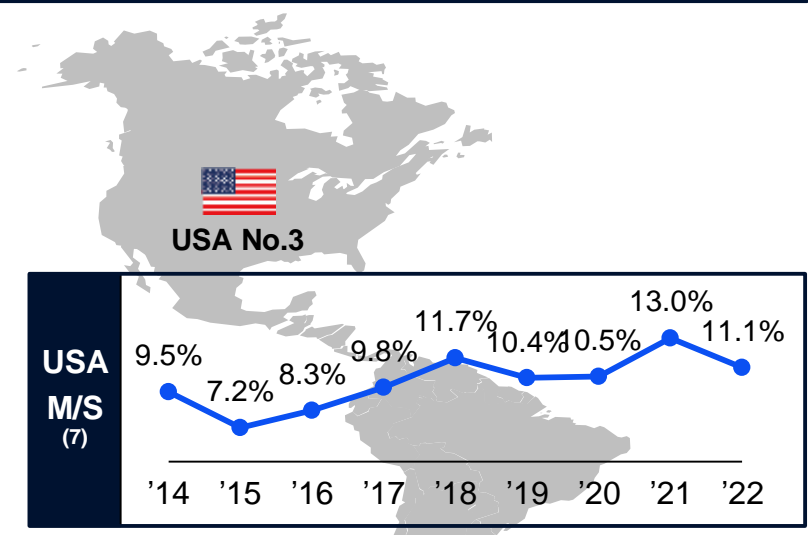


Global Ranking

Unit: Billion US\$

Rank	Company	Sales ⁽²⁾	Metal Cutting				
			TC	MC	EDM	Grinding	Laser
1	DMG Mori	4.67	●	●			●
2	Mazak	3.63 ⁽³⁾	●	●			●
3	DMT	2.18	●	●			●
4	Okuma ⁽⁴⁾	2.10	●	●			●
5	Makino	2.01	●	●		●	
6	Grob		●	●			
7	Haas		●	●			
8	GF Machining		●	●		●	
9	Citizen		●	●			
10	EMAG		●	●			●

Global Top 3 sales revenue



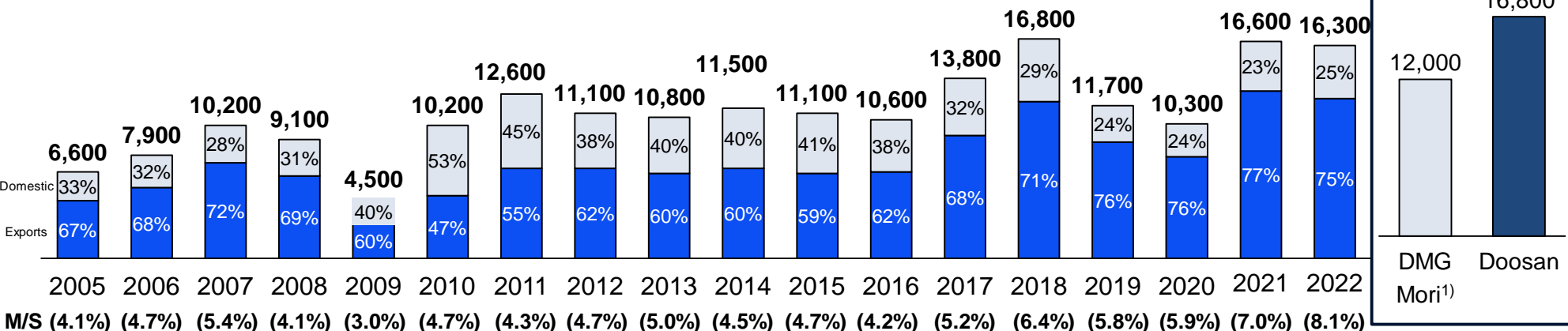
Source: Metalworking Insider, IR materials (1) Based on Korea Machine Tool Association data (2) Estimated based on sales revenue from 1Q~3Q, 2021 (3) Unlisted company, estimated sales amount (4) Excluding Okuma grinding sales, Makino EDM sales (5) Based on import players (excluding Tapping Companies) (6) As of 2021.1~3Q : 6th place in sales units, 4th place in sales amount → Sales amount ranking No.1 Mazak(Japan), No.2 Taikan(China), No.3 BJJD(China) (7) Based on the USMTO contract quantity

Performance

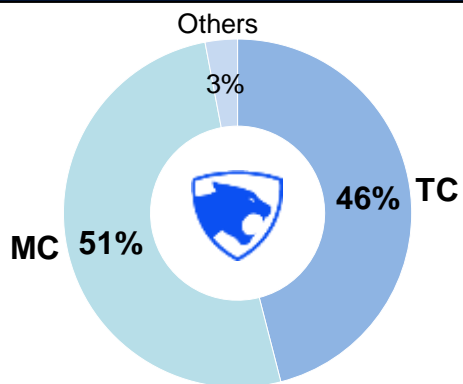
Sales Performance (No. of units)

Running total as of 2022 :
264,300 units

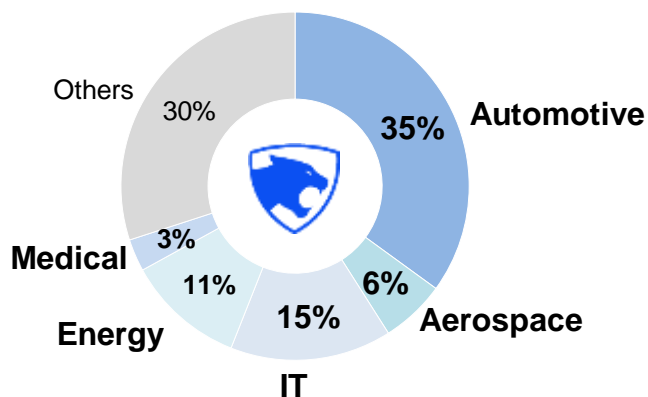
Sales unit
Global No.1
(2018)



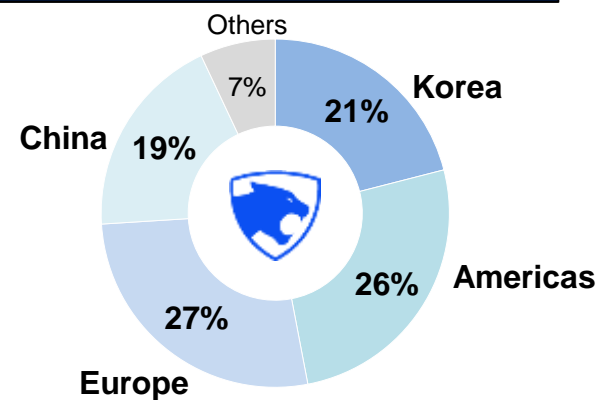
Product of Category Portfolio (Amounts)



Demand Industry Portfolio (Amounts)



Regional Portfolio (Amounts)



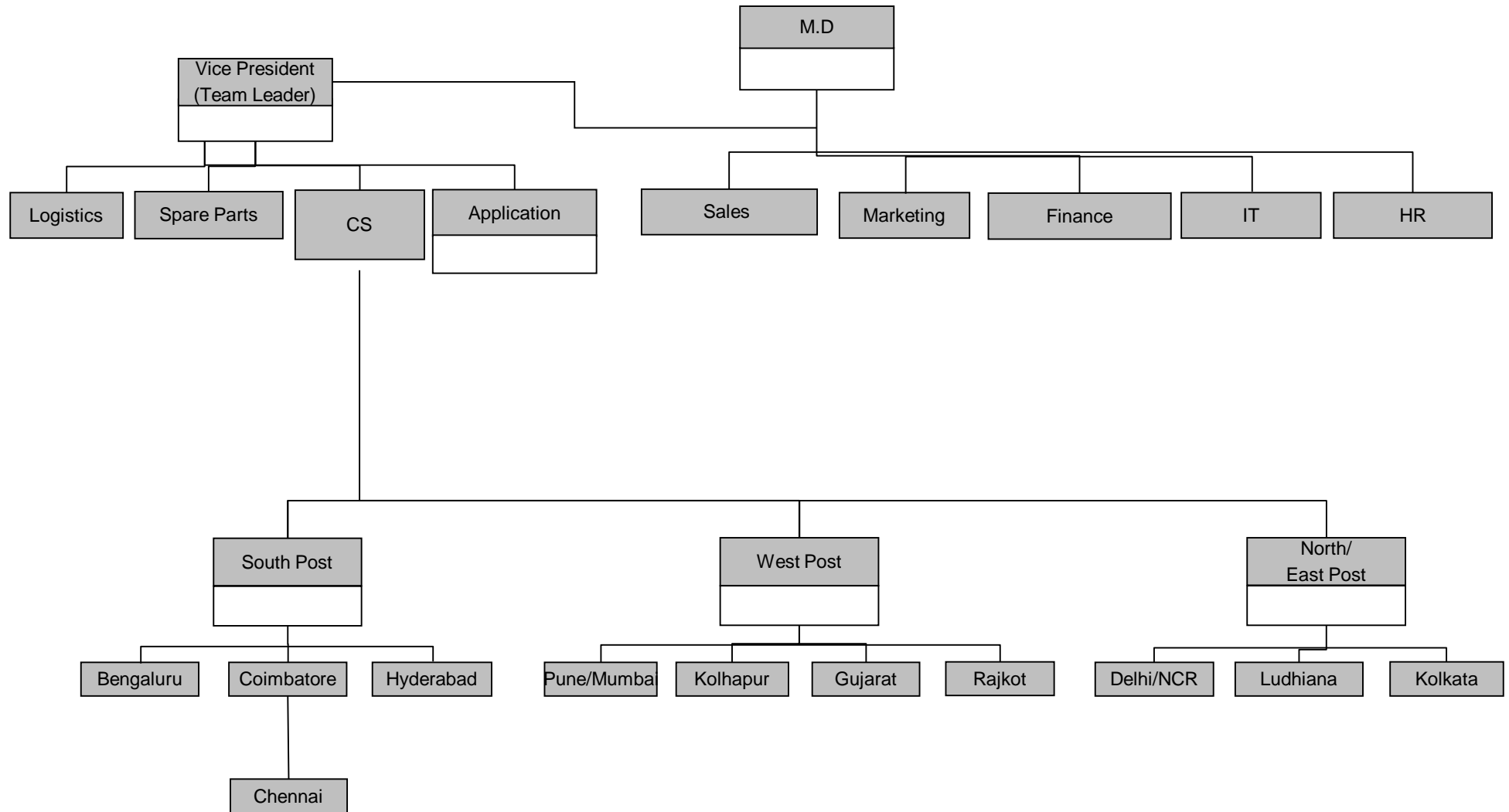
• Based on the number of production (Source : Japanese newspaper-The nikkanshimbun)

DNSI (DN Solutions India Pvt. Ltd.)

Company	<ul style="list-style-type: none">• DNSI (DN Solutions India Pvt. Ltd.)
Role	<ul style="list-style-type: none">• Sales & Marketing• Customer Service and Parts Sales• Dealer support for Sales & Service• Parts Inventory 5,000 items and 4 Mil. USD
Manpower	<ul style="list-style-type: none">• Total 44(CS 20, AE 4, Sales 3, Parts 4 and staffs)
Location	<ul style="list-style-type: none">• No.82, Jakkuar Village, Yelahanka Hobli, Bangalore-560064, Karnataka, India
Sales/Service Network	<ul style="list-style-type: none">• 11 Sales Channel Pan India• 11 Doosan Service Post Pan India• 2 Technical Center in Bangalore and Pune



DNSI Organization



Market Share

- DN Solutions Market Share is 9.4% in the imported machine segment for FY.22 against 100 plus companies.
- We stand second in India in terms of import for FY.22.
- Consistently we are in top 03 countries w.r.t import of machines (sales volume) in India, from past 05 years.

2019		2020		2021		2022	
Segments	Qty	Segments	Qty	Segments	Qty	Segments	Qty
VMC	1843	VMC	1105	VMC	2554	VMC	2000
HTL	871	HTL	699	HTL	856	HTC	859
HMC	462	HMC	300	HMC	334	HMC	322
VTL	116	VTL	75	VTL	78	VTL	117
HBM	30	HBM	22	HBM	24	HBM	28
DCM	101	DCM	59	DCM	76	DCM	103
Total	3423	Total	2260	Total	3922	Total	3429
Market Share	8.30%	Market Share	12.00%	Market Share	9.50%	Market Share	9.40%
Company names	Qty	Company names	Qty	Company names	Qty	Company names	Qty
HASS	638	HASS	423	FANUC	1099	HAAS	942
BROTHER	334	DOOSAN	272	HASS	893	DNS (DOOSAN)	322
DOOSAN	285	MAZAK	189	DOOSAN	374	FANUC	290
MAZAK	226	FANUC	182	MAZAK	235	BROTHER	279
FANUC	207	BROTHER	137	BROTHER	213	MAZAK	266
MAKINO	206	DMG MORI	81	MAKINO	117	TSUGAMI	173
DMG MORI	171	MAKINO	81	DMG MORI	99	MAKINO	150
TSUGAMI	149	HYUNDAI	54	HYUNDAI	87	DMG MORI	114
TONGTAI	90	TSUGAMI	49	CITIZEN	62	HYUNDAI	74
HWACHEON	72	OKUMA	39	TSUGAMI	61	STAR	65
HYUNDAI	63	HWACHEON	30	HURCO	56	OKUMA	63
TAKISAWA	63	HURCO	28	FEMCO	46	HURCO	62
OKUMA	62	CITIZEN	27	HWACHEON	43	HWACHEON	56
KOMATSU NT	48	FEMCO	26	OKUMA	28	CITIZEN	49

DNSI – Key Customers from All Sectors

OIL&GAS	GENERAL ENGINEERING	CONTRUCTION
1. ULTRA CORPOTECH	1. ORBIT BEARING	1. JCB
2. OMNITECH ENGINEERING	2. KASTURY FOUNDRY	2. IBCC
3. HINDALCO	3. Ashok Iron	3. DOOSAN BOBCAT
AUTOMOTIVE	AEROSPACE	OTHERS
1. STEEL STRIP WHEELS INDIA	1. TATA ADVANCE SYSTEMS	1. WEATHERFORD
2. LINAMAR INDIA	2. IAMPL	2. L&T HYDRAULICS
3. VALEO INDIA	3. MAGELLAN AEROSPACE	3.KIRLOSKAR OIL ENGINES
4. SANSERA	4. GTN ENGINEERING	4. THE SONA GROUP
5. HAPPY FORGING	5.MAHINDRA AEROSPACE	5.COOPER CORPORATION

Thank You!