

Q4 2025 Earnings Release

January 27, 2026 Investor Relations

Contents

I. Financial Performance

- Business Performance
- Financial Position

II. Business Highlights

- Cloud & AI
- Smart Engineering
- Digital Business Service

III. Appendix

- Income Statement, Financial Position (Consolidated)

Disclaimer

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- I. Financial Performance
 - Business Performance
 - Financial Position
- II. Business Highlights
- III. Appendix

Achieved 4Q25 revenue of KRW 1.94 trillion and operating profit of KRW 216 billion

Sustained growth with FY2025 Revenue of KRW 6.13 trillion and operating profit of KRW 556 billion



Consolidated Income Statement

(Unit: KRW Billion)

Income Statement	4Q24	4Q25	YoY	FY24	FY25	YoY
Revenue	2,024	1,936	-4.4%	5,983	6,130	+2.5%
COGS	1,713	1,593	-7.0%	5,051	5,177	+2.5%
Gross Profit	311	343	+10.2%	931	952	+2.3%
SG&A	111	127	+14.1%	418	397	-5.2%
Operating Profit	200	216	+7.9%	513	556	+8.4%
OPM(%)	9.9%	11.2%	+1.3%p	8.6%	9.1%	+0.5%p
Net Income Before Tax	182	236	+29.8%	486	597	+23.0%
Net Income	132	181	+36.6%	365	442	+21.2%

- I. Financial Performance
 - Business Performance
 - Financial Position
- II. Business Highlights
- III. Appendix

Sustainable financial soundness through stable debt management

Financial Position

(Unit: KRW Billion)

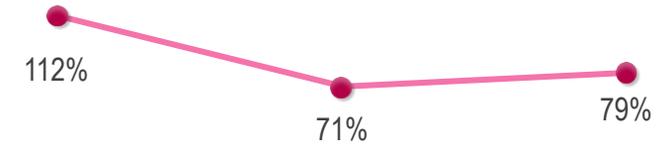
Financial Position	4Q24	3Q25	4Q25
Total Assets	4,505	4,708	5,284
Current Assets	3,435	3,548	3,965
Cash and cash equivalents *	1,163	1,494	1,679
Non-current assets	1,069	1,159	1,319
Total Liabilities	2,382	1,950	2,340
Current Liabilities	1,852	1,555	1,857
Non-current liabilities	529	395	483
Total Equity	2,123	2,757	2,945
Borrowing**	556	391	390
Net Borrowing	-608	-1,103	-1,290
Credit Rate	AA-(Positive)	AA0(Stable)	AA0(Stable)

* Financial institution deposits inclusive

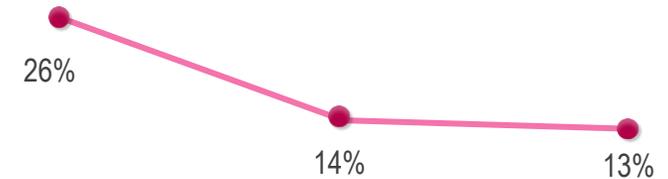
**Lease liabilities exclusive

Leverage Ratios

[Liabilities to Equity]



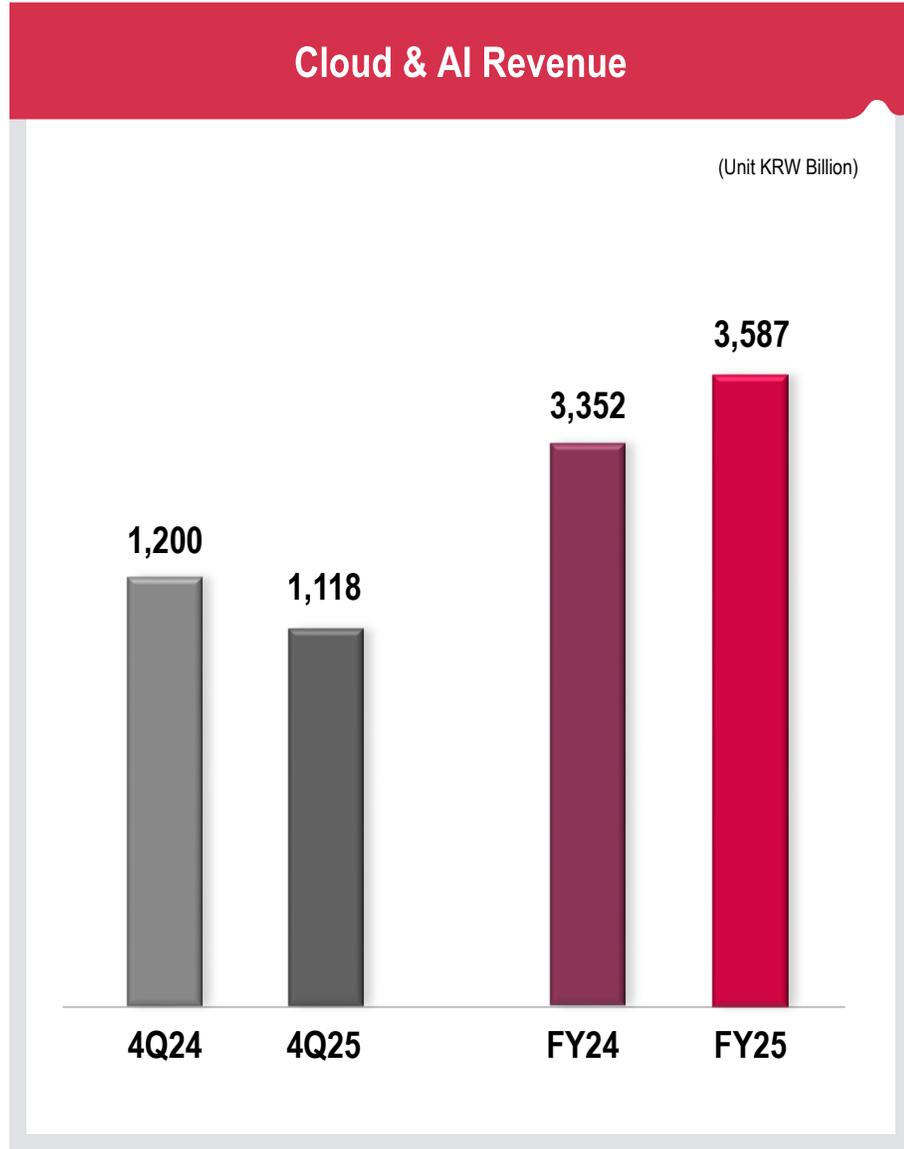
[Debt to Equity]



[Net Debt to Equity]



- I. Financial Performance
- II. Business Highlights
 - Cloud & AI
 - Smart Engineering
 - Digital Business Service
- III. Appendix



Highlights

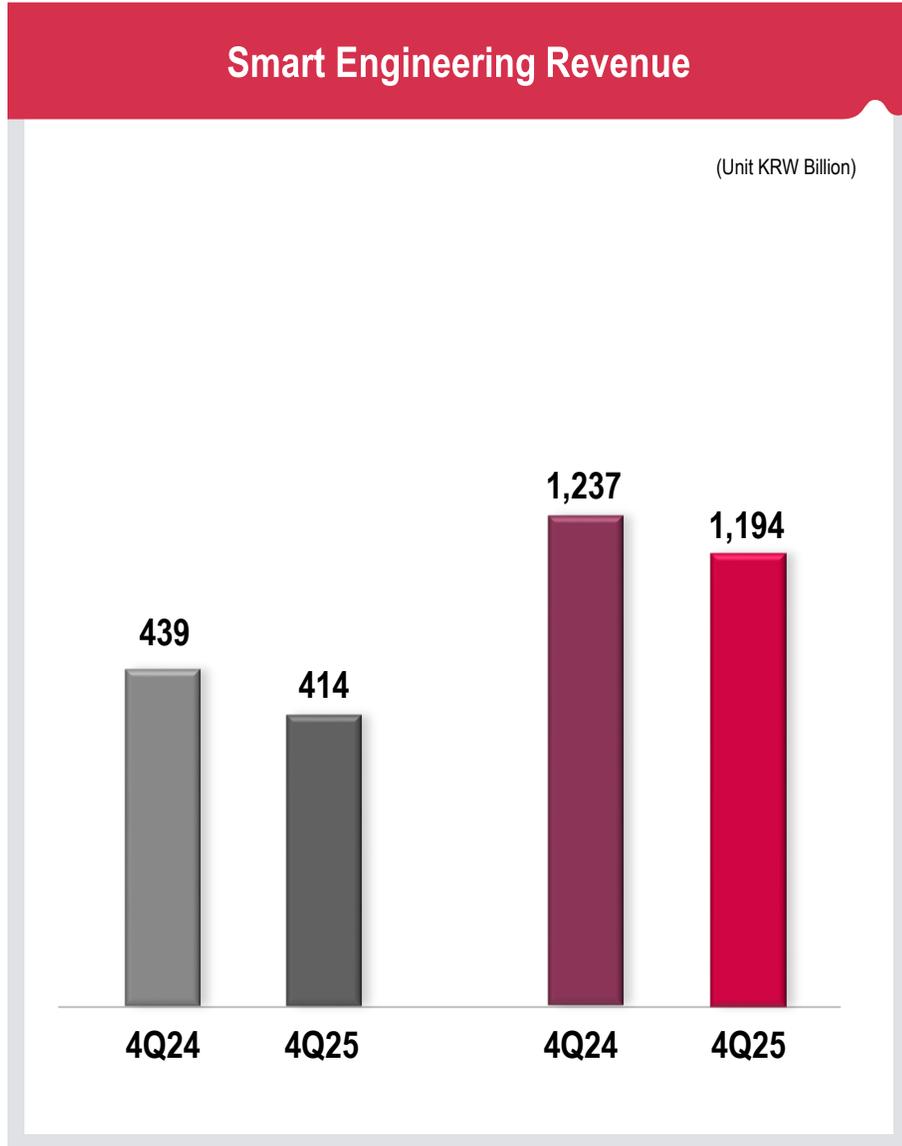
- **Earnings Review**
 - 【 4Q25 Growth, YoY -6.8% 】**
 - Revenue decline partly reflecting overseas factory completion
 - 【 FY25 Growth, YoY +7.0% 】**
 - **Strong growth** in *AIDC system integration and colocations
 - **Expanding AI/Data platform builds & cloud-based AI services**

- ▶ **Business Outlook**

“Accelerate AI-driven growth with pioneering leadership”

- Securing new AIDC build awards to drive further growth
- Core Businesses (Cloud/Infra) to maintain sustained growth
- AI platform (such as AgenticWorks) advancement & expansions

- I. Financial Performance
- II. Business Highlights
 - Cloud & AI
 - Smart Engineering
 - Digital Business Service
- III. Appendix



Highlights

- **Earnings Review**
 - 【 4Q25 Growth, YoY -5.6% 】**
 - Revenue decline reflecting softer demand at key affiliates
- 【 FY25 Growth, YoY -3.5% 】**
 - [Non-Captive] Expansion into new industries (defense, energy, etc.) driving customer growth and revenue increase
 - [Captive] Revenue decline reflecting completion of large projects

- ▶ **Business Outlook**

“Steady revenue from key affiliates while driving non-captive expansion via AI & robotics transformation”

 - Potential new project opportunities from battery & display affiliates
 - Expected growth in domestic defense and shipbuilding, with overseas expansion alongside customers

I. Financial Performance

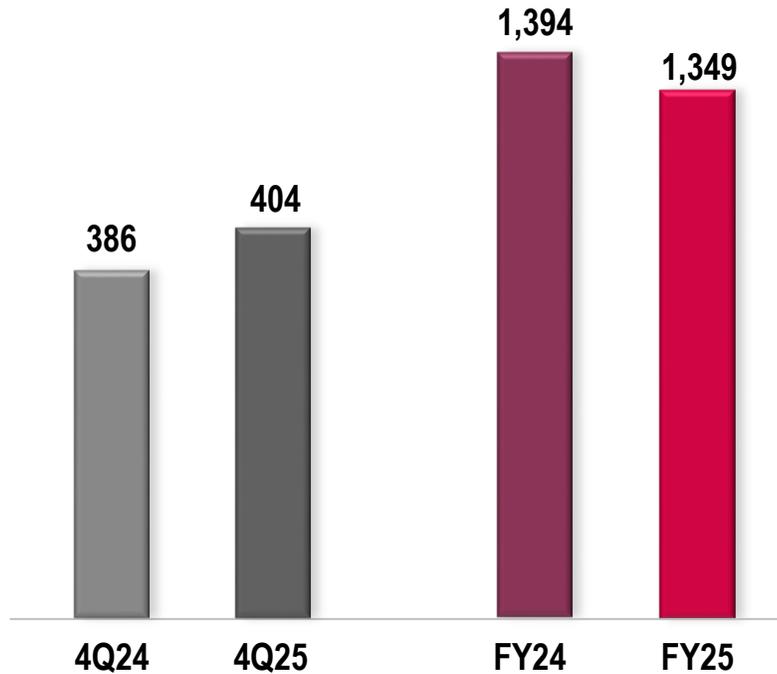
II. Business Highlights

- Cloud & AI
- Smart Engineering
- Digital Business Service

III. Appendix

Digital Business Service Revenue

(Unit KRW Billion)



Highlights

● Earnings Review

【 4Q25 Growth, YoY +4.5% 】

- Revenue growth driven by large-scale financial projects entering the main development phase

【 FY25 Growth, YoY -3.2% 】

- Year-on-year revenue decline reflecting large public project completion and external headwinds at key customers

▶ Business Outlook

“Growth in financial IT services, strengthening public sector presence, and expanding AX offerings ”

- Sustained financial sector growth supported by large order wins
- Expanding leadership in national AI transformation initiatives
- Scaling AX offerings across industries

I. Financial Performance

II. Business Highlights

III. Appendix (Consolidated)

- Income Statement

- Financial Position

Income Statement (Consolidated)

(Unit: KRW Billion)

KRW Billion	2023	2024					2025				
	FY	1Q	2Q	3Q	4Q	FY	1Q	2Q	3Q	4Q	FY
Revenue	5,605	1,070	1,450	1,438	2,024	5,983	1,211	1,460	1,522	1,936	6,130
Cloud & AI	2,894	551	806	795	1,200	3,352	717	872	880	1,118	3,587
Smart Engineering	1,193	223	299	277	439	1,237	206	267	306	414	1,194
Digital Business Service	1,518	296	345	367	386	1,394	288	321	337	404	1,349
COGS	4,770	939	1,202	1,197	1,713	5,051	1,053	1,221	1,310	1,593	5,177
Gross Profit	835	131	247	242	311	931	158	239	212	343	952
SG&A	371	99	110	99	111	418	79	98	92	127	396
Operating Profit (Loss)	464	32	138	143	200	513	79	141	120	216	556
Net income before Tax	442	20	132	151	182	485	88	131	141	236	597
Income tax provision	110	7	30	34	50	121	31	32	36	56	155
Net Income	332	13	102	118	132	365	57	99	105	181	442
Controlled shares	332	12	103	118	132	364	57	99	105	181	441

I. Financial Performance

II. Business Highlights

III. Appendix (Consolidated)

- Income Statement

- Financial Position

Financial Position (Consolidated)

(Unit: KRW Billion)

KRW Billion	FY 2022	FY 2023	FY 2024	1Q25	2Q25	3Q25	4Q25
Total Assets	3,865	4,041	4,505	4,722	4,544	4,708	5,284
Current Assets	2,848	3,037	3,435	3,608	3,394	3,548	3,965
Cash and cash equivalents	728	505	1,077	1,692	1,301	1,269	1,141
Financial institution deposits	111	162	87	142	237	226	538
Trade receivables, net	1,392	1,532	1,662	999	1,042	1,144	1,665
Other current assets	616	839	611	775	814	910	621
Non-current assets	1,017	1,003	1,069	1,114	1,150	1,159	1,319
Property, plant and equipment, net	565	549	545	540	530	521	536
Intangible assets	104	88	64	62	56	54	53
Other non-current assets	348	367	460	512	564	584	731
Total Liabilities	2,234	2,172	2,382	2,091	1,830	1,950	2,340
Trade payables	740	768	794	529	521	553	664
Short-term borrowings	277	3	5	4	1	1	0
Current portion of long-term borrowings	260	0	160	280	230	230	230
Long-term borrowings	150	549	390	160	160	160	160
Other current liabilities	808	853	1,032	1,118	918	1,007	1,286
Total Equity	1,631	1,868	2,123	2,631	2,714	2,757	2,944