

12 May 2026

Company Update: 4DS Advances Strategic Transition Toward Commercial Deployment in India

4DS Memory Limited (“4DS” or “the Company”) is pleased to advise that it is advancing the commercialisation of its proven 60nm ReRAM platform within the rapidly expanding mature-node semiconductor South East Asia markets, particularly in India.

The Board has identified that the strongest near-term commercial opportunity for the Company lies in leveraging its proven 60nm ReRAM technology across industrial, automotive, defence, aerospace and embedded applications where reliability, manufacturability and operating stability remain critical.

India has committed more than AUD\$25 billion toward the development of a sovereign semiconductor manufacturing industry, with current fabrication capability focused on mature-node technologies, including the same 60nm–65nm range at which 4DS has already demonstrated successful operation of its proprietary PCMO-based ReRAM platform as announced on 23 August 2023.

As part of this strategy, 4DS recently announced the intention to pursue an acquisition to enable product integration and commercial deployment pathways within the semiconductor sector.

India Commercialisation Pathway

4DS has identified multiple commercial pathways for the deployment of its proven 60nm platform within India’s emerging semiconductor ecosystem, including:

- semiconductor licensing and technology transfer opportunities aligned with India’s fabrication roadmap;
- embedded memory applications across industrial, aerospace, defence and infrastructure systems;
- research and development partnerships supporting edge AI and memory-centric computing architectures; and
- OEM integration pathways enabled through software, SDK and systems capability.

The Company regards India as a strategically important market, given the compatibility between its developing semiconductor manufacturing capabilities and the mature-node process range successfully demonstrated by the 4DS platform.

Executive Chairman David McAuliffe, with technical support, will travel to India during May 2026 to engage with semiconductor fabrication, government, research and industry stakeholders as part of the Company’s commercialisation strategy.



Comment from Executive Chairman David McAuliffe

“4DS has invested substantially in developing and validating its 60nm ReRAM platform and we believe the market is now increasingly aligning with the strengths of that technology.

India’s semiconductor roadmap presents a commercially relevant opportunity for mature-node memory technologies, particularly in industrial, defence and embedded applications where reliability and manufacturability are critical”.

Further updates regarding the Company’s strategic activities will be provided as appropriate.

This announcement has been authorised for release by the Board of 4DS Memory Limited.

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Authorised for release by the Board.

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About 4DS

4DS Memory Limited (ASX: 4DS), with facilities located in Silicon Valley, is a semiconductor technology company bringing high bandwidth, high endurance, persistent non-volatile memory to advanced CMOS process nodes. Its technology, known as Interface Switching ReRAM, features tuneable persistence and low energy per bit for today’s most challenging compute intensive and AI processor applications. Established in 2007, 4DS owns a patented IP portfolio, comprising 34 USA patents, and is the first company to develop PCMO ReRAM, on an advanced CMOS processing node. For more information, please visit www.4dsmemory.com.