



**Terms and Conditions Governing the Rights and Obligations of the Issuer  
and Holders of the Warrants to Purchase the Newly Issued Ordinary Shares of  
Roctec Global Public Company Limited No. 5 (ROCTEC-W5)**



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*This translation has been prepared solely for the convenience of those not familiar with the Thai languages. If there is any inconsistency between the translation and the original Thai language version, the latter shall prevail in all respects.*

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and Holders of the Warrants to Purchase the Newly Issued Ordinary Shares of  
Roctec Global Public Company Limited No. 5 (ROCTEC-W5)**

The Warrants to Purchase the Newly Issued Ordinary Shares of Roctec Global Public Company Limited No. 5 (ROCTEC-W5) (the “Warrants” or “ROCTEC-W5 Warrants”) were issued by Roctec Global Public Company Limited (the “Company”) pursuant to the resolution of the Extraordinary General Meeting of Shareholders No. 1/2023, held on December 21, 2023, which approve the issuance and allocation of not exceeding 2,029,494,045 units of Warrants to the existing shareholders of the Company at no cost, at the allocation ration of 4 existing ordinary shares for 1 unit of ROCTEC-W5 Warrants, where any fractions derived from the calculation based on the allocation ration shall be disregarded. In this regard, the holders of the Warrants shall be entitled to the rights as prescribed in the Terms and Conditions (as specified in the definition below), and the Company and the Warrant Holders shall be bound by these Terms and Conditions in all respects. The Warrant Holders shall be deemed to have a thorough knowledge and understanding of all provisions of these Terms and Conditions.

The Company will make available copies of these terms and conditions at its principal office and the principal office of the Agent Receiving Exercise Intention (as specified in the Terms and Conditions herein) so that the Warrant Holders can inspect the copies of these Terms and Conditions during the business hours on Business Days of the respective place of the Issuer or the Agent Receiving Exercise Intention (as the case may be).

**Definitions**

All wordings and terms used in these Terms and Conditions shall have the following meanings:

<b>Terms and Conditions</b>	means	the Terms and Conditions Governing the Rights and Obligations of the Company and Holders of the Warrants to purchase the newly issued ordinary shares of Roctec Global Public Company Limited No.5 (ROCTEC-W5), including any amendment thereto (if any);
<b>SET</b>	means	the Stock Exchange of Thailand;
<b>Agent Receiving Exercise Intention</b>	means	any person(s) duly appointed by the Company to act as its agent in receiving the intention to exercise the Warrants (if any) pursuant to Clause 1.4.5;
<b>Warrant Registrar</b>	means	Thailand Securities Depository Co., Ltd. and/or any other person duly appointed to act as the registrar of the Warrants;
<b>Company</b>	means	Roctec Global Public Company Limited;
<b>Warrant Substitute</b>	means	a document issued by Thailand Securities Depository Co., Ltd. to be used in substitution of the Warrants;
<b>Warrant(s)</b>	means	the warrant(s) to purchase the newly issued ordinary shares of Roctec Global Public Company Limited No. 5 (ROCTEC-W5),






		which are in the named certificate and transferable, and shall also mean the Warrant Substitute;
<b>Notification No. TorChor. 34/2551</b>	means	Notification of the Capital Market Supervisory Board No. TorChor. 34/2551 Re: Application for and Approval of Offer for Sale of Warrants to Purchase Newly Issued Shares and Shares Issuable upon Exercise of Warrants dated 15 December 2008 (including any amendment thereto);
<b>Warrant Holder(s)</b>	means	a due holder of each unit of Warrants in accordance with Clause 1.2.3;
<b>Period for the Notification of their intention to exercise the Warrants</b>	means	the period of time during which the Warrant Holders who wish to exercise their rights to purchase the newly issued ordinary shares of the Company may deliver the notification of their intention to exercise the Warrants pursuant to Clause 1.4.3;
<b>Exercise Date</b>	means	the date on which the Warrant Holders may exercise their rights to purchase the newly issued ordinary shares of the Company pursuant to Clause 1.4.1;
<b>Business Day</b>	means	a day on which the SET is open for general business, other than a Saturday or Sunday or a day on which the Bank of Thailand announces as a bank holiday of the commercial bank;
<b>Securities Depository</b>	means	Thailand Securities Depository Co., Ltd;
<b>Register Book</b>	means	the register book or source of registered information in which details of the Warrants and the Warrant Holders are recorded and kept by the Warrant Registrar;
<b>Rights in the Warrants</b>	means	all rights in the Warrants, including, but not limited to, the right to subscribe for the Underlying Shares, entitlement to attend and vote in the meeting of the Warrant Holders, rights to compensation in the case which there are insufficient Underlying Shares;
<b>Underlying Shares</b>	means	newly issued shares of the Company not exceeding 2,029,494,045 shares with the par value of THB 0.10 per share to accommodate the exercise of Warrants, including ordinary shares to be newly issued in the case of rights adjustment under the Terms and Conditions; and



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Office of the SEC

means

the Office of the Securities and Exchange Commission.

## 1 Details of the Warrants

The Company issued and allocated 2,029,494,045 units of Warrants to the existing shareholders of the Company, at no cost, at the allocation ration of 4 existing ordinary shares for 1 unit of ROCTEC-W5 Warrants, where any fractions derived from the calculation based on the allocation ratio shall be disregarded. In this regard, the Company shall issue and allocate the Warrants to the existing shareholders whose name as appear on the date for determining the names of shareholders who shall be entitled to be allocated with the ROCTEC-W5 Warrants (Record Date) on January 4, 2024. The details of the Warrants are as follows:

### 1.1 Key Features of the Warrants

<b>Name</b>	:	Warrants to Purchase Newly Issued Ordinary Shares of Roctec Global Public Company Limited No. 5 (ROCTEC-W5)
<b>Type</b>	:	In named certificate and transferable
<b>Allocation methods</b>	:	Allocate to existing shareholders of the Company, at the allocation ration of 4 existing ordinary shares for 1 unit of Warrants. The Company shall issue and allocate the Warrants to the existing shareholders whose name as appear on the date for determining the names of shareholders who shall be entitled to be allocated with the ROCTEC-W5 Warrants (Record Date) on January 4, 2023.  Any fractions derived from the calculation based on the allocation ration shall be disregarded.
<b>Number of warrants issued and allocated</b>	:	2,029,494,045 Units
<b>Price per unit</b>	:	THB 0.00 (at no cost)
<b>Exercise ratio</b>	:	1 unit of Warrant for 1 ordinary share, unless the exercise ratio is adjusted otherwise pursuant to the conditions concerning the rights adjustment.
<b>Exercise price</b>	:	THB 1.50 per share, unless the exercise price is adjusted otherwise pursuant to the conditions concerning the rights adjustment. In case of exercise price adjustment, the exercise price per unit after the adjustment shall not be lower than the par value of the Company's ordinary shares.
<b>Issuance date of the Warrants</b>	:	February 6, 2024
<b>Term of the Warrants</b>	:	3 years from the issuance date. The Company shall not extend the term of the Warrants after the issuance.



**Exercise period and method** : The Warrant Holders shall be entitled to exercise their rights under the Warrants to purchase the newly issued ordinary shares of the Company on the last Business Day of every quarter of each calendar year (i.e. the last Business Day of March, June, September and December) (the “**Exercise Date**”). The first Exercise Date will be on March 29, 2024.

The Warrants remaining from the exercise of rights or not being exercised on the Exercise Date may be accumulated so that they can be exercised on the next Exercise Date for the entirety of the warrant term. However, upon the end of the term of the Warrants, all of the Warrants that have not been exercised shall be cancelled and terminated.

The last Exercise Date will be the date of the 3<sup>rd</sup> anniversary from the issuance date of the ROCTEC-W5 Warrants. In case the last Exercise Date is on the holiday of the SET, the last Exercise Date shall be shall be postponed to prior Business Day.

**Period for serving a notice of intention to exercise the Warrants** : The Warrant Holders who wish to exercise their rights to purchase the newly issued ordinary shares of the Company shall deliver a notification of intention to exercise the Warrants during 9.00 hrs. to 15.30 hrs. within the period of 5 Business Days prior to each Exercise Date, save for the last Exercise Date in which the notification of intention to exercise the Warrants shall be submitted within the period of 15 days prior to the last Exercise Date.

**Irrevocability of notice of intention to exercise the Warrants** : The intention to exercise the Warrants shall be irrevocable upon the notification of intention to exercise the Warrants is served by the Warrants holders.

**Numbers of ordinary shares reserved to accommodate the exercise of the Warrants** : Not exceeding 2,029,494,045 shares, with a par value of THB 0.10 per share, equivalent to 46.57 percent of the total issued and paid-up shares of the Company.

Calculation method for the ratio of the accommodated shares:

= (Number of shares reserved to accommodate the exercise of the ROCTEC-W5 Warrants + number of existing shares reserved to accommodate the exercise of the ROCTEC-W3 Warrants) / (Number of registered paid-up shares)

= (2,029,494,045+1,750,743,750)/(8,117,976,177) \*100

= 3,780,237,795.00 / (8,117,976,177) \* 100

= 46.57 percent

**Secondary market for the Warrants** : The Company will file the application for listing the Warrants on the SET as the listed securities.

**Secondary market for the shares issued upon of the Warrants** : The Company will list the issued ordinary shares upon the exercise of the Warrants on the SET as the listed securities.



**Dilution effects**

**(1) Control Dilution Effects**

In the event that all of the Warrants are fully exercised, but the holders who exercise the ROCTEC-W5 Warrants are not the shareholders of the Company, there will be a control dilution effect on the Company's shareholders of approximately 20\* percent compared to the shareholding before the issuance and allocation of the Warrants.

\*\*Calculated from number of shares reserved to accommodate the Warrants issued this time of 2,029,494,045 shares, divided by the sum of (1) number of the Company's paid-up shares as of 17 October 2023 of 8,117,976,177 shares, and (2) number of shares accommodated for the Warrants issued this time of 2,029,494,045 shares.

Control Dilution

- = Number of shares reserved to accommodate the Warrants issued this time / (Number of paid-up shares + Number of shares accommodated the Warrants issued this time)
- =  $2,029,494,045 / (8,117,976,177 + 2,029,494,045) * 100$
- = approximately 20 percent

Remark: In case of the rights under ROCTEC-W5 Warrants are fully exercised, the number of paid-up shares of the Company shall be increased to be 10,147,470,222 shares, which will dilute the shareholding of the existing shareholders of approximately 20 percent.

**(2) Price Dilution Effects**

After the issuance and allocation of the Warrants to the existing shareholders of the Company pro rata to their respective shareholdings this time and the right under the Warrants are fully exercised, there will be no price dilution effect since the exercise price is higher than the market price prior to the allocation.

The market price prior to the allocation is the closing price of the Company's ordinary shares traded on the SET for 7 consecutive business days prior to October 18, 2023 which is the date that the Board of Directors' Meeting has been held and resolved to propose the agenda to the Extraordinary General Meeting of Shareholders No. 1/2023 (price between October 6, 2023 and October 17, 2023 which is equivalent to THB 0.52 per share).





**(2) Earnings per Share Dilution Effects**

After the issuance of the Warrants to the shareholders of the Company pro rata to their respective shareholdings and the exercise rights under the ROCTEC-W5 Warrants are fully exercised by the holders of the ROCTEC-W5 Warrants, there will be effect on earnings per share dilutions of approximately 20 percent compared to shareholding before the issuance of the Warrants, calculated as follows:

Earning Per Share Dilution

$$= \frac{(\text{Earning Per Share before the allocation*} - \text{Earning Per Share After the allocation**})}{\text{Earning Per Share before the allocation}}$$

$$= \frac{(0.0175 - 0.0140)}{0.0175} * 100$$

$$= 20 \text{ percent}$$

\* Earning Per Share before the allocation = net profit / number of paid-up shares or equivalent to 0.0175

\*\* Earning Per Share after the allocation = net profit / (number of paid-up shares + number of shares accommodated for the Warrants) or equivalent to 0.0140

**1.2 Warrants, Warrant Holders Register Book and Right-holder under Warrants**

1.2.1 The Warrant Registrar has the duty to issue the Warrants to all Warrant Holders. The Warrants deposited with the Securities Depository shall have the Securities Depository's name specified as the Warrant Holders. The Warrant Registrar will issue the Warrants or the Warrant Substitute in the form as specified by the Securities Depository.

1.2.2 The Warrant Registrar has the duty to prepare and keep the Register Book until all of the Warrants are fully exercised to purchase Underlying Shares of the Company or until the term of the Warrants is expired (as the case may be).

1.2.3 Right-holder under the Warrants

- Right-holder under the Warrants in general

Rights in the Warrants shall fall upon a person or juristic person whose name appears as the owner of the Warrants in the Register Book at the time or on the first day of the closure of the Register Book, except for the case of the transfer of the Warrants (which can be proven with the Company pursuant to Clause 1.3), provided that the rights in the Warrants shall fall upon the transferee of the Warrants.

- Right-holder under the Warrants where the Securities Depository acts as the Warrant Holder



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Rights in the Warrants shall fall upon a person or juristic person whose name is informed in writing by the Securities Depository to the Warrant Registrar as being a Right-holder under the Warrants in an amount informed by the Securities Depository to the Warrant Registrar, provided that such amount shall not exceed the total number of the Warrants issued in the name of Securities Depository which are recorded in the Register Book at the time or at the first day of the closing of the Register Book.

- 1.2.4 At the time the Securities Depository informs the Warrant Registrar, the Warrant Registrar has the duty to issue the Warrants to the Right-holder under the Warrants who deposits the Warrants with the Securities Depository and register such Right-holder under the Warrants as the Warrant Holders in the Register Book in an amount specified by the Securities Depository. In this regard, after the Warrants are issued and registered, the Warrant Registrar shall amend the total amount of the Warrants registered in the Register Book under the name of the Securities Depository by deducting the total amount of the Warrants registered under the name of the Right-holder under the Warrants. For those total amount of the Warrants issued to the Securities Depository, if the Warrant Registrar fails in any way whatsoever to amend the total amount of the Warrants issued to the Securities Depository, it shall be deemed that the total amount is reduced by the amount of the Warrants issued and registered in the name of such Right-holder under the Warrants.

### 1.3 Transfer of the Warrants

- 1.3.1 Transfer of the Warrants which are not kept at the Securities Depository shall be made in accordance with the following criteria:

- The transfer of the Warrants between the transferor and the transferee: Transfer of the Warrants shall be completed when the transferor of the Warrants, whose name appears in the Register Book as the owner of the Warrants in the amount to be transferred, or the latest transferee, being endorsed continuously by all transferors whose names appear thereon, (as the case may be) delivers the warrant certificate to the transferee by causing his/her signature endorsed at the back as a proof of the transfer.
- Effect of the transfer of the Warrants between the transferee and the Company: The transfer of the Warrants shall be valid against the Company when the Warrant Registrar receives the request for registering the transfer of the Warrants and the warrant certificate is duly signed by the transferee.
- Effect of the transfer of the Warrants between the transferee and third parties: The transfer of the Warrants shall be valid against third parties when the Warrant Registrar duly registers the transfer of the Warrants in the Register Book.
- Request for registering the transfer of the Warrants: Such request shall be made at the principal office of the Warrant Registrar on Business Days and during business hours of the Warrant Registrar. The request shall be made in accordance with the forms and procedures prescribed by the Warrant Registrar. A person requesting registration shall submit to the Warrant Registrar the warrant certificate bearing all signatures pursuant to the aforementioned criteria along with other evidence to prove the accuracy and completeness of the transfer and receipt of the transfer of the Warrants in the Register Book, along with the Warrants and other evidence to confirm the correctness and completeness of the Warrants transfer as prescribed by the Warrant Registrar. However, the Warrant Registrar shall be entitled to refuse the request for registering the transfer of the Warrants, if the Warrant Registrar views that such transfer is illegal.



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1.3.2 Transfer of the Warrants kept at the Securities Depository shall be made in accordance with the regulations of the SET, Securities Depository and the relevant agencies.

**1.4 Exercise of the Warrants and Conditions for Exercising the Warrants to Purchase the Newly Issued Ordinary Shares**

**1.4.1 Exercise Date of the Warrants to Purchase the Newly Issued Ordinary Shares**

The Warrant Holders shall be entitled to exercise their rights under the Warrants to purchase the newly issued ordinary shares either in a whole or in part in every quarter (i.e. the last Business Day of March, June, September and December) (the "Exercise Date"). In the event that the Exercise Date is not a Business Day, the Exercise Date shall be postponed to prior Business Day. The Company shall not extend the maturity of the Warrants and there are no provisions allowing the Warrant Holders to exercise their rights before the specified Exercise date.

The Warrants remaining from the exercise of right or not being exercised on the Exercise Date shall be accumulated to be exercised on the next Exercise Date throughout the term of the Warrants. However, upon the end of the term of the Warrants, all the Warrants that have not been exercised shall be cancelled and terminated.

The last Exercise Date will be the date of the 3<sup>rd</sup> anniversary of the ROCTEC-W5 Warrants from the issuance. In this regard, in the event that the last Exercise Date coincides with the holiday of the SET, such exercise date shall be rescheduled to the preceding business day. The details shall be as below:

1<sup>st</sup> Exercise Date: Friday, March 29, 2024 (Last business day of the first quarter of 2024)

2<sup>nd</sup> Exercise Date: Friday, June 28, 2024 (Last business day of the second quarter of 2024)

3<sup>rd</sup> Exercise Date: Monday, September 30, 2024 (Last business day of the third quarter of 2024)

4<sup>th</sup> Exercise Date: Monday, December 30, 2024 (Last business day of the fourth quarter of 2024)

5<sup>th</sup> Exercise Date: Monday, March 31, 2025 (Last business day of the first quarter of 2025)

6<sup>th</sup> Exercise Date: Monday, June 30, 2025 (Last business day of the second quarter of 2025)

7<sup>th</sup> Exercise Date: Tuesday, September 30, 2025 (Last business day of the third quarter of 2025)

8<sup>th</sup> Exercise Date: Tuesday, December 30, 2025 (Last business day of the fourth quarter of 2025)

9<sup>th</sup> Exercise Date: Tuesday, March 31, 2026 (Last business day of the first quarter of 2026)

10<sup>th</sup> Exercise Date: Tuesday, June 30, 2026 (Last business day of the second quarter of 2026)



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11 <sup>th</sup> Exercise Date:	Wednesday, September 30, 2026 (Last business day of the third quarter of 2026)
12 <sup>th</sup> Exercise Date:	Wednesday, December 30, 2026 (Last business day of the fourth quarter of 2026)
13 <sup>th</sup> Exercise Date:	Friday, February 5, 2027 (3 <sup>rd</sup> year anniversary of the Warrants)

1.4.2 Exercise of the Warrants to Purchase the Newly Issued Ordinary Shares

In exercising the rights to purchase the newly issued ordinary shares of the Company, the Warrant Holders may exercise their rights under the Warrants to purchase the newly issued ordinary shares either in whole or in part. For any outstanding Warrants that are not exercised before the Last Exercise Date, the Company will deem that the holders of such outstanding Warrants do not wish to exercise their rights thereunder, and such Warrants shall be deemed as being nullified without having been exercised.

1.4.3 Period for the Notification of Intention to Exercise the Warrants

The Warrant Holders shall deliver a notification of intention pursuant to the procedures specified in 1.4.6 between 9.00 hrs. to 15.30 hrs. within the period of 5 days prior to each Exercise Date (the “**Notification Period**”), save for the last Exercise Date in which the notification of intention to exercise the Warrants shall be submitted within the period of 15 days prior to the last Exercise Date. (the “**Last Notification Period**”).

In this respect, the Company shall not close the Warrant Holders Register Book to suspend the transfer of Warrants, except for the last exercise of the Warrants in which the Warrant Holders Register Book will be closed to suspend the transfer of the Warrants for a period of 21 days prior to the Last Exercise Date. In such case, the SET will post SP sign to suspend the trading of the Warrants for a period of 2 Business Days prior to the book closure. In the case that the first book closure date is not a Business Day, such first book closure date shall be rescheduled to the preceding Business Day.

The Company shall inform the Warrant Holders of additional details (if any) in connection with the Exercise Date, the Notification Period, the Last Notification Period, exercise ratio, exercise price, details of the Company’s bank account for the subscription and exercise of the rights under the Warrants, a person appointed by the Company to receive the notification of intention to exercise the Warrants (if any) (the “**Agent Receiving Exercise Intention**”) and the place to exercise the Warrants, through the electronic information disclosure means of the SET at least 5 Business Days prior to each Notification Period. In case of the Last Exercise Date, the Company will notify the reminding information through the SET at least 14 days prior to the Last Notification Period and will also deliver such details to the Warrant Holders whose names appear in the Warrant Holders Register Book on the book closure date via registered mail.



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#### 1.4.4 Warrant Registrar

**Thailand Securities Depository Co., Ltd.**

93 The Stock Exchange of Thailand Building

Ratchadapisek Road, Dindaeng,

Bangkok 10400, Thailand

Tel: 0-2229-9000

Fax: 0-2009-9991

Website: [www.set.or.th/tsd](http://www.set.or.th/tsd)

The Warrant Registrar shall be responsible for closure of the Register Book. The full name, nationality and address of each Warrant Holder as well as other relevant details, as required by Securities Depository shall be specified in the Register Book. In the case of conflicting information, the Company will deem that the information recorded in the Register Book is correct.

The Warrant Holders are obliged to notify the Warrant Registrar any change or error in their respective details recorded in the Register Book, and the Warrant Registrar shall change or correct such information accordingly.

The Company reserves the right to change the Warrant Registrar by notifying the Warrant Holders in advance for not less than 30 days through the Electronic Listed Companies Information Disclosure of the SET, and the Office of the SEC in advance for not less than 30 days as well. In addition, the Company will also deliver the notice of such change to the Warrant Holders via registered mail.

#### 1.4.5 Agent Receiving Exercise Intention and Place to Exercise the Warrants

The Company has appointed “Beyond Securities Public Company Limited” to act as the agent of the Company in receiving the intention to exercise the Warrants and proceeds from the subscription of newly issued ordinary shares. The Warrant Holders may contact the Agent Receiving Exercise Intention at:

**Securities Operations Department**

46/7 Rungrojthanakul Building 11<sup>th</sup> - 12<sup>th</sup> Floor.

Ratchadaphisek Road, Huaikhwang Sub-district,

Huaikhwang District, Bangkok 10310

Tel: 02-820-010

Fax: 02-820-0208

Website: <https://www.beyondsecurities.co.th/>



In cases that there are any changes in the Agent Receiving Exercise Intention and/or the place to exercise the Warrants, the Company will notify the Warrant Holders of those changes through the electronic information disclosure means of the SET.

#### 1.4.6 Exercise Procedures

The Warrant Holders can obtain the form of notice to exercise the Warrants from the Agent Receiving Exercise Intention or download the form from the Company’s website ([www.roctecglobal.co.th/Investor relations](http://www.roctecglobal.co.th/Investor%20relations)). The Warrant Holders may notify the Agent Receiving Exercise Intention of their intention to exercise the rights to purchase the newly issued ordinary shares, which shall be made within the



Notification Period, pursuant to Clause 1.4.3 above.

In cases that the Warrants are in the scripless system, the Warrant Holders who wish to exercise the Warrants shall notify their intention and fill in the form to withdraw the Warrants from the scripless system as prescribed by the SET.

- (a) In cases that the Warrant Holders have their own securities trading accounts and the Warrants are kept in the account named "Thailand Securities Depository Co., Ltd. for depositors", the Warrant Holders, who wish to exercise the Warrants, shall notify their intention and fill in the form to withdraw the Warrants as prescribed by the SET and submit the same to their respective securities broker. Such securities company will then proceed with notifying the Securities Depository to withdraw the Warrants from the account named "Thailand Securities Depository Co., Ltd. for depositors". The Securities Depository will then issue the Warrant Substitute to be used as a supplemental document in exercising the rights to purchase the Company's newly issued ordinary shares.
- (b) In the case that the Warrant Holders do not have a securities trading account and having the Warrants kept with the Securities Depository in the account named "securities issuing company's account", the Warrant Holders, who wish to exercise the Warrants, shall notify their intention and fill in the form to withdraw the Warrants as prescribed by the SET and submit the same to the Securities Depository requesting for the withdrawal of the Warrants from the account named "securities issuing company's account". The Securities Depository will then issue the Warrant Substitute to be used as a supplemental document in exercising the rights to purchase the Company's newly issued ordinary shares.

The Warrant Holders (including those who hold the Warrants in certificate form and in the scripless system), who wish to exercise their rights to purchase the newly issued ordinary shares, shall comply with the conditions concerning the notification of their intention to exercise the Warrants, by taking necessary actions and submitting the required documents, on the relevant Exercise Date, as follows:

- (a) To submit a correct and completed form of notice to exercise the Warrants, duly signed by the Warrant Holder, to the Agent Receiving Exercise Intention within the Notification Period;
- (b) To deliver the warrant certificate or the Warrant Substitute in the number specified in the form of notice to exercise the Warrants to the Company or the Agent Receiving Exercise Intention (as the case maybe);
- (c) To pay the exercise price according to the amount specified in the form of notice to exercise the Warrants to the Company or the Agent Receiving Exercise Intention (as the case maybe). The Warrant Holders who wish to exercise the rights to purchase the newly issued ordinary shares shall (1) make the payment by cheque, personal cheque, cashier's cheque or draft which is collectible in Bangkok within 1 Business Day and is crossed and made payable to "Beyond Securities Public Company Limited " attached with the transfer evidence issued by the bank, the full name and the phone number, or (2) make payment by the personal cheque, cashier's cheque or draft must be issued 3 Business Days prior to each exercise and is crossed and made payable to "Beyond Securities Public Company Limited " no.911-3-00420-5, current account , Bangkok bank , Wireless Road branch by specifying name-surname and contact number or (3) make the payment by



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other means which may be further determined and notified by the Company and/or the Agent Receiving Exercise Intention.

In this respect, the exercise of rights to purchase the newly issued ordinary shares shall be considered completed only when the Company or the Agent Receiving Exercise Intention has successfully collected the payment of such exercise price. If the Company or the Agent Receiving Exercise Intention could not collect such payment in whatsoever case that is not due to the fault of the Company or the Agent Receiving Exercise Intention, the Company will consider that such Warrant Holder intends to cancel his/her respective intention to exercise the rights to purchase the newly issued ordinary shares at that time. In such case, the Company and/or the Agent Receiving Exercise Intention will return the Warrants together with the cheque, cashier's cheque or draft which could not be collected, to such Warrant Holder within 14 days from the respective Exercise Date. Nevertheless, the Warrant Holders will be able to notify their intention to exercise the rights to purchase the newly issued ordinary shares on the subsequent Exercise Date, except in the case of the Last Exercise Date in which the Company shall consider that such Warrants are nullified without being exercised. In such case, the Company and the Agent Receiving Exercise Intention shall not be responsible for the interest and/or any damages in whatsoever cases.

(d) The Warrant Holders shall be responsible for the stamp duty or any applicable tax (if any) in accordance with the Revenue Code, any regulation or any law governing the exercise of the Warrants.

(e) Supplemental documents required for the exercise of the Warrants:

1) Thai individuals : A certified true copy of a valid identification card or governmental officer identification card / state enterprise officer identification card (in case of any change in name/surname which causes the name/surname to be different from the name/surname appearing on the Warrants, the copy of any document issued by the governmental authority e.g. certificate of name/surname change, etc. must be enclosed).

2) Non-Thai individuals : A certified true copy of a valid alien identification card or passport.

3) Thai legal entities : 3.1) A certified true copy of the affidavit issued by the Ministry of Commerce for a period of no longer than 6 (six) months prior to the respective Exercise Date, duly signed by the authorized director(s) whose name appeared on the affidavit and a certified true copy of the documents specified in no. 1) or 2) of the authorized director(s).



3.2) A certified true copy of the documents under no. 1) or 2), as the case may be, of the authorized signatory(ies) who certifies



the documents under no. 3.1)

- 4) Non-Thai legal entities : A certified true copy of the certificate of incorporation and/or affidavit of such legal entity, notarization by a notary public of the country issuing such documentation, duly signed by the authorized director(s) and a certified true copy of the documents specified in no. 1) or 2) of the authorized director(s).
- 5) Custodians : A certified true copy of the certificate of incorporation, notarization by a notary public of the country issuing such documentation, including a letter of custodian appointment and a certified true copy of the documents specified in no. 1) or 2) of the authorized signatory.

If a Warrant Holder fails to submit the aforementioned supplemental documents when exercising the Warrants, the Company and/or the Agent Receiving Exercise Intention reserve the rights to deem that such Warrant Holder does not intend to exercise the rights under the Warrants at the relevant Exercise Date. Nevertheless, the Company and/or the Agent Receiving Exercise Intention may use its discretion to allow such Warrant Holder to exercise the Warrants as deemed appropriate.

- 1.4.7 The number of Warrants to be exercised shall be in non-fractional number only. The exercise ratio shall be every one unit of Warrants for one newly issued ordinary share, except where the exercise ratio is adjusted otherwise pursuant to the conditions concerning the rights adjustment in Clause 1.5.
- 1.4.8 The number of the ordinary shares issued upon the exercise shall be calculated by dividing the amount of money for exercising the Warrants paid by the Warrant Holder by the exercise price at the time for exercising the right. The Company shall issue the ordinary shares in whole numbers not exceeding the number of units of the Warrants multiplies by the exercise ratio. If there is an adjustment of the exercise price and/or exercise ratio causing ordinary shares to be in fractions after the calculation, such fractions shall be disregarded and the Company shall refund the money remaining from such exercise without any interest to the respective Warrant Holder within 14 days after the respective Exercise Date pursuant to the methods and conditions prescribed by the Company or the Agent Receiving Exercise Intention.

Nevertheless, if the cheque of the remainder of the exercise price or the exercise price that is not exercised or not eligible to exercise has been dispatched via registered mail to the address specified in the Warrant Exercise Intention Notification Form, it shall be deemed that the Warrant Holder duly receives such money and the Warrant Holder shall have no rights to claim any interest and/or any other compensation.

- 1.4.9 The Warrant Holders shall exercise their rights to purchase newly issued ordinary shares by an amount of no less than 100 (one hundred) ordinary shares, having the units of the Warrants to be exercised in whole numbers only. Nonetheless, in case the Warrant Holder exercises its right in the amount less than 100 (one hundred) newly issued ordinary shares, such Warrant Holder must fully exercise his/her rights a single time, except in the case of the Last Exercise Date, in which case the Warrant Holder may exercise his/her rights without any limitation on the minimum amount to be



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purchased. The exercise ratio shall be 1 unit of the Warrants for 1 ordinary share, unless the exercise ratio is adjusted otherwise pursuant to the conditions concerning the rights adjustment.

1.4.10 If the Company or the Agent Receiving Exercise Intention receives the documents specified in Clause 1.4.6 e) for notification of the intention to exercise the Warrants that are incomplete or incorrect; or the amount received for payment is not in accordance with the amount specified in the form of notice to exercise the Warrants; or it can be proved that the information which the Warrant Holder filled out therein is incomplete or incorrect; or the stamp duties attached thereto (if any) are not in compliance with the Revenue Code, applicable regulations or laws, the Warrant Holder shall correct such error within the respective Notification Period. If the Warrant Holder fails to correct the error within such period, the Company shall deem that such Warrant Holder intends to cancel the exercise of Warrants at the relevant Exercise Date. In such case, the Company and/or the Agent Receiving Exercise Intention shall return the Warrants together with the money received, without any interest, to such Warrant Holder within 14 days of the relevant Exercise Date subject to the procedures and conditions specified by the Company and/or the Agent Receiving Exercise Intention. Nevertheless, the Warrant Holder will be able to re-notify its intention to exercise the rights to purchase the newly issued ordinary shares on the subsequent Exercise Date, except in the case of the Last Exercise Date in which the Company shall deem that such Warrants are nullified without being exercised. The Company shall not be responsible for the interest and/or any damages in whatsoever cases.


1.4.11 Where the Warrant Holder fails to make a full payment, the Company and/or the Agent Receiving Exercise Intention shall be entitled to take any of the following actions as they deem appropriate:

- (a) To deem that the notification of intention to exercise the Warrants be cancelled without any exercise; or
- (b) To deem that the number of the newly issued ordinary shares being subscribed is equivalent to the amount of money obtained from the exercise in accordance with the exercise price at the time; or
- (c) To require the Warrant Holder to make additional payment in full according to the rights he/she wishes to exercise within the respective Notification Period. If the Company or the Agent Receiving Exercise Intention does not receive the payment in full within such period, it shall be deemed that the notification of intention to exercise the Warrants be cancelled without any exercise.

Remark: The Company shall use the procedure specified in Clause b) above for the last exercise.

Any action caused by the Company or the Agent Receiving Exercise Intention shall be deemed final.

In case of a) and c), the Company and/or the Agent Receiving Exercise Intention shall return the money received, without any interest, subject to the procedures and conditions specified by the Company and/or the Agent Receiving Exercise Intention, together with the Warrants by registered mail, within 14 Business Days from the respective Exercise Date. In this case, it is deemed that the rights are not being exercised.



- 1.4.12 Where the Company or the Agent Receiving Exercise Intention fails to return the money remaining from the exercise to the Warrant Holders within the period of 14 days of the respective Exercise Date, the Warrant Holders shall be entitled to receive the interest at the rate of 7.5 percent per annum, calculated based on the money remaining from the exercise from the date over the period of 14 days to the date on which the Warrant Holders receive the money returned.

Nonetheless, if the Company or the Agent Receiving Exercise Intention duly dispatched cheque, draft, bank's note, bank's payment order, crossed and made payable to the Warrant Holders, via registered mail to the address specified in the form of notice to exercise the Warrants, it shall be deemed that the Warrant Holders duly receive such refund of money and the Warrant Holders shall no longer have rights to claim any interest and/or damages in respect thereof.

- 1.4.13 When the Warrant Holder, who wishes to exercise the rights to purchase ordinary shares, has complied with all conditions concerning the notification of the intention to exercise the Warrants, that is to say, the Warrant Holder had submitted the Warrants, the form of notice to exercise the Warrants, including the supplemental documents pursuant to Clause 1.4.6 e), and the full payment of the exercise price has been duly made, the Warrant Holder shall be unable to revoke the exercise of Warrants, unless prior written consent from the Company or the Agent Receiving Exercise Intention is obtained.
- 1.4.14 When the Warrant Holder has not fulfilled and complied with all conditions concerning the notification of the intention to exercise the Warrants as specified by the Company or the Agent Receiving Exercise Intention after the lapse of the Last Notification Period, it shall be deemed that such Warrants are nullified without being exercised and the Warrant Holder shall no longer be able to exercise the rights under the Warrants.
- 1.4.15 In the event that the Warrant Holder submitted the Warrants in an amount exceeding the intention, the Company or the Agent Receiving Exercise Intention shall deliver the new Warrants having the amount reduced to such Warrant Holder, if such Warrants are on the share scrip system, via registered mail within 14 days from the respective Exercise Date, and the former Warrants shall be canceled.
- 1.4.16 The Company shall register the change in its paid-up capital with the Ministry of Commerce in the amount corresponding with the number of the new ordinary shares issued upon each exercise of the Warrants within 14 days of the date on which the Company receives the payment for each exercise. The Company shall arrange the share registrar of the Company to register the Warrant Holders, who exercise the Warrants, as shareholders of the Company in the shares register book according to the number of new ordinary shares issued upon the relevant exercise of Warrants.

In this regard, the Company shall also submit an application for listing the new ordinary shares issued upon the exercise of Warrants as the listed securities on the SET within 30 days of the respective Exercise Date.

The rights attached to the new ordinary shares issued upon the exercise of the Warrants shall carry the same rights in all respects as the existing ordinary shares of the Company from the date on which the name of the Warrant Holders or the substitute holders are registered as the shareholders of the Company and the Ministry of Commerce accepts the registration of the increase of paid-up capital from the issuance of newly issued shares upon the exercise of Warrants.



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1.4.17 In the event that the number of new ordinary shares issued upon the exercise of Warrants are not sufficient to accommodate the exercise of Warrants; the Company shall pay damages to the Warrant Holders who are unable to exercise their rights under the Warrants pursuant to Clause 1.8. Nonetheless, the Company shall not pay the Warrant Holders who are unable to exercise their rights even if there is sufficient amount of ordinary shares if the Warrant Holders are a Non-Thai individual or Non-Thai legal entity unable to exercise the right as limited by the foreign shareholding restriction as specified in the Company's Articles of Association.

**1.5 Conditions of the Adjustment of Rights under the Warrants**

In order for the adjustment to be made for the purpose of preserving the interests of the Warrant Holders and not to be less favorable than those currently available to them, the Company shall adjust the exercise price and/or the exercise ratio to purchase the Company's newly issued ordinary shares at any time throughout the term of the Warrants, if any of the events set out below occur:

1.5.1 In case of a change in par value of the Company's ordinary share as a result of a combination or split of shares, the adjustment of exercise price and exercise ratio shall become effective immediately once the change in the par value of the Company's ordinary share, provided that the adjustment is made in order for the Warrant Holders to receive the same amount of shares as if there is no change in the par value of the Company's ordinary shares.

(1) The exercise price shall be adjusted in accordance with the following formula:

$$\text{Price 1} = \frac{\text{Price 0} \times (\text{Par 1})}{\text{Par 0}}$$

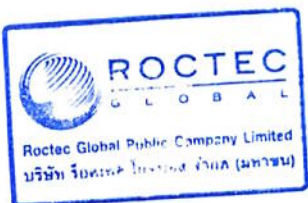
(2) The exercise ratio shall be adjusted in accordance with the following formula:

$$\text{Ratio 1} = \frac{\text{Ratio 0} \times (\text{Par 0})}{\text{Par 1}}$$

In this regard,

- |         |            |   |
|---------|------------|---|
| Price 1 | represents | the new exercise price after the change;                            |
| Price 0 | represents | the former exercise price prior to the change;                      |
| Ratio 1 | represents | the new exercise ratio after the change;                            |
| Ratio 0 | represents | the former exercise ratio prior to the change;                      |
| Par 1   | represents | the par value of the Company's ordinary shares after the change;    |
| Par 0   | represents | the par value of the Company's ordinary shares prior to the change. |

1.5.2 In case the Company issues and offers newly issued ordinary shares to its existing shareholders and/or to the public and/or to specific investors at the **“net price per share of the company's newly issued ordinary shares”** below 90 percent of the **“market price per share of the company's ordinary shares”**. The adjustment of the exercise price and the exercise ratio shall become effective immediately from the first day on which the purchasers of the ordinary shares shall not be entitled to subscribe for the newly issued ordinary shares (the first day on which the SET posts XR sign) in case of the offering to the existing shareholders (Rights Issue), and/or the first day





on which the newly issued ordinary shares are offered to public offering and/or a private placement, as the case may be.

“**Net price per share of the company’s newly issued ordinary shares**” shall be calculated from the total amount of proceeds received from the offering of the ordinary shares less the amount of expenses incurred from the offering of such securities (if any), then divided by the total number of the newly issued ordinary shares at the specific time.

In addition, in case there are more than one offering prices at the same offering of the Company’s ordinary shares under the condition that the shares subscription must be made altogether, all of the offering prices shall be used to calculate the net per share of the newly issued ordinary shares. However, in case such condition is not applied, only the offering prices that are lower than 90 percent of the “**market price per share of the company’s ordinary shares**” shall be used for the calculation.

“**Market price per share of the company’s ordinary shares**” means the trade value of the Company’s ordinary shares, divided by the number of the Company’s total issued ordinary shares, which have been traded on the SET during the period of 15 consecutive Business Days prior to the date of the calculation.

“**Date of the calculation**” means the first day on which the purchasers of the ordinary shares shall not be entitled to subscribe for the newly issued ordinary shares (the first day on which the SET posts XR sign) in the case of the offering to the existing shareholders (Rights Issue) and/or the first day on which the newly issued ordinary shares are offered to public offering and/or a private placement, as the case may be.

In case that the “Market Price per Share of the Company’s Ordinary Shares” cannot be determined because there is no trading of the ordinary shares during such period of time, the Company shall determine the Fair Value of the Company’s ordinary shares to be used, as a substitute, for the calculation.

“**Fair value**” means the price evaluated by the financial advisor which has been approved by the Office of the SEC .

- (1) The exercise price shall be adjusted in accordance with the following formula:

$$\text{Price 1} = \frac{\text{Price 0} \times [(A \times \text{MP}) + \text{BX}]}{[\text{MP} \times (A + B)]}$$

- (2) The exercise ratio shall be adjusted in accordance with the following formula:

$$\text{Ratio 1} = \frac{\text{Ratio 0} \times [\text{MP} \times (A + B)]}{[(A \times \text{MP}) + \text{BX}]}$$

In this regard,

Price 1	represents	the new exercise price after the change;
Price 0	represents	the former exercise price prior to the change;
Ratio 1	represents	the new exercise ratio after the change;
Ratio 0	represents	the former exercise ratio prior to the change;
MP	represents	the market price of the Company’s ordinary shares;



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- A represents the number of the ordinary shares which are fully paid as at the date prior to the closure of the share register book of the Company to determine persons entitled to subscribe for the newly issued ordinary shares in the case of the offering to the existing shareholders and/or the date prior to the first day on which the newly issued ordinary shares are offered to a public offering or a private placement, as the case may be;
- B represents the number of the newly issued ordinary shares offered to the existing shareholders and/or a public offering and/or a private placement;
- BX represents the amount of proceeds received less the amount of expenses incurred from the issuance of the securities (if any) to the existing shareholders and/or a public offering and/or a private placement.

1.5.3 In case the Company offers any new securities to its existing shareholders and/or to the public offering and/or to specific investors through private placement and such securities are entitled to convert/change to ordinary shares or the rights to purchase the ordinary shares (the “**newly issued securities with convertible rights**”), such as convertible debentures or warrants to purchase the ordinary shares, at the “**net price per share of the newly issued ordinary shares reserved for the exercise**” of such rights below 90 percent of the “**market price per share of the company’s ordinary shares**”.

The adjustment of the exercise price and the exercise ratio shall become effective immediately from the first day on which the purchasers of the ordinary shares shall not be entitled to subscribe for the newly issued securities with the rights to convert/change to the ordinary shares or the rights to purchase the ordinary shares (the first day on which the SET posts XR or XW sign) in the case of the offering to the existing shareholders (Right Issue), and/or the first day on which any newly issued securities with the rights to convert/change to the ordinary shares or the rights to purchase the ordinary shares are offered in case of a public offering or a private placement, as the case may be.

“**Net price per share of the newly issued ordinary shares reserved for the exercise of rights**” shall be calculated from the total amount of proceeds received from the offering of securities having the rights to convert/change to the ordinary shares or the rights to purchase the ordinary shares less the amount of expenses incurred from the issuance of such securities (if any) and the sum of the proceeds received from the exercise of the rights to convert/change to the ordinary shares or the exercise of the rights to purchase the ordinary shares, then divided by the total number of the newly issued ordinary shares reserved for the exercise of the rights of such securities.

In addition, in case there is more than one offering price at the same offering of the Company’s ordinary shares under the condition that the share subscription must be made altogether, all of the offering prices shall be used to calculate the net per share of the newly issued ordinary shares. However, in case such a condition is not applied, only the offering prices that are lower than 90 percent of the market price per share of the “**market price per share of the company’s ordinary shares**” shall be used for the calculation.



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“Market price per share of the company’s ordinary shares” means the same as detailed in Clause 1.5.2.

“Date of the calculation” means the first day on which the purchasers of the ordinary shares shall not be entitled to subscribe for the newly issued securities having the rights to convert/change to the ordinary shares or the rights to purchase the ordinary shares in the case of the offering to the existing shareholders (Right Issue), and/or the first day on which the securities having the rights to convert/change to the ordinary shares or the rights to purchase of the ordinary shares are offered in the case of a public offering or a private placement, as the case may be.

- (1) The exercise price shall be adjusted in accordance with the following formula:

$$\text{Price 1} = \frac{\text{Price 0} \times [(A \times \text{MP}) + \text{BX}]}{[\text{MP} \times (A + B)]}$$

- (2) The exercise ratio shall be adjusted in accordance with the following formula:

$$\text{Ratio 1} = \frac{\text{Ratio 0} \times [\text{MP} \times (A + B)]}{[(A \times \text{MP}) + \text{BX}]}$$

In this regard,

- |         |            |  |
|---------|------------|--|
| Price 1 | represents | the new exercise price after the change;   |
| Price 0 | represents | the former exercise price prior to the change;   |
| Ratio 1 | represents | the new exercise ratio after the change;   |
| Ratio 0 | represents | the former exercise ratio prior to the change;   |
| MP      | represents | the market price of the Company’s ordinary shares;   |
| A       | represents | the number of the ordinary shares which are fully-paid as at the date prior to the closure date of the share register book of the Company to determine persons entitled to subscribe for the newly issued securities having the rights to convert/change to the ordinary shares or the rights to purchase ordinary shares in the case of the offering to the existing shareholders and/or the date prior to the first day on which the newly issued securities having the rights to convert/change to the ordinary shares or the rights to purchase the ordinary shares are offered in the case of a public offering or a private placement, as the case may be; |
| B       | represents | the number of the newly issued ordinary shares reserved for the exercise of the having the rights to convert or change to the ordinary shares or the rights to purchase the ordinary shares as offered to the existing shareholders and/or a public offering and/or a private placement;   |



*[Handwritten signatures]*

BX represents the total amount of proceeds received less the amount of expenses incurred from the issuance of the securities having the rights to convert/change to the ordinary shares or the rights to purchase the ordinary shares issued and offered to the existing shareholders and/or a public offering and/or a private placement (if any) together with amount of proceeds received from the exercise of rights under such securities to convert/change to ordinary shares or the right to subscribe for the ordinary shares.

1.5.4 In case the Company declares dividend payment, in the form of stock dividend, whether in whole or in part, to its shareholders, the adjustment of the exercise price and the exercise ratio shall become effective immediately from the first day on which the purchasers of the ordinary shares shall not be entitled to receive such stock dividends (the first day on which the SET posts XD sign).

(1) The exercise price shall be adjusted in accordance with the following formula:

$$\text{Price 1} = \frac{\text{Price 0} \times A}{(A + B)}$$

(2) The exercise ratio shall be adjusted in accordance with the following formula:

$$\text{Ratio 1} = \frac{\text{Ratio 0} \times (A + B)}{A}$$

In this regard,

Price 1 represents the new exercise price after the change;  
 Price 0 represents the former exercise price prior to the change;  
 Ratio 1 represents the new exercise ratio after the change;  
 Ratio 0 represents the former exercise ratio prior to the change;  
 A represents the number of the ordinary shares which are fully paid as at the date prior to the date of closure of the share register book to determine the person entitled to the stock dividend;  
 B represents the number of the newly issued ordinary shares in form of the stock dividends.

1.5.5 In the event that the Company distributes dividends in cash in excess of 90 percent of the Company's net profit according to the consolidated financial statements of the Company (which has been reviewed) after the deduction of the net loss, legal reserve, minority shareholders' equity and income tax from the operating results in any relevant fiscal year during the term of the Warrants. The adjustment of the exercise price and the exercise ratio shall become effective immediately from the first day on which the purchasers of the ordinary shares shall not be entitled to receive such dividend distribution (the first day on which the SET posts XD sign).



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In this regard, the percentage of the dividend to be distributed to the shareholders shall be calculated based on the actual dividend paid from the operating results in each fiscal year, divided by net profit according to the consolidated financial statements of the Company (which has been reviewed), after the deduction of the net loss, legal reserve, minority shareholders' equity and income tax from the operating results of the respective fiscal period of the same year. The actual dividend payment shall include the interim dividend payment of such fiscal period.

Date of the calculation means the first day on which the purchasers of the ordinary shares shall not be entitled to receive the dividends (the first day on which the SET posts XD sign).

- (1) The exercise price shall be adjusted in accordance with the following formula:

$$\text{Price 1} = \frac{\text{Price 0} \times [\text{MP} - (\text{D} - \text{R})]}{\text{MP}}$$

- (2) The exercise ratio shall be adjusted in accordance with the following formula:

$$\text{Ratio 1} = \frac{\text{Ratio 0} \times \text{MP}}{[\text{MP} - (\text{D} - \text{R})]}$$

In this regard,

Price 1	represents	the new exercise price after the change;
Price 0	represents	the former exercise price prior to the change;
Ratio 1	represents	the new exercise ratio after the change;
Ratio 0	represents	the former exercise ratio prior to the change;
MP	represents	the market price of the Company's ordinary shares;
D	represents	actual dividends per share paid to the shareholders;
R	represents	the payment of the dividends per share at the rate of 90 (ninety) percent of the consolidated financial statements of the Company (which has been reviewed) after deduction of the net loss and legal reserve, divided by the total number of the shares entitled to receive the dividend.

- 1.5.6 In any event causing the Warrant Holders to lose their acquirable rights and interest other than those stated in Clauses 1.5.1 – 1.5.5, the Company may consider the adjustment of the new exercise price and/or the exercise ratio (or adjustment of the number of the units of the Warrants in lieu of the exercise ratio) in a fair manner and not to be less favorable than those currently available to them. In such case, the Company's decision on such matter shall be deemed as final. The Company shall notify the Office of the SEC and the Warrant Registrar such details within the period of 15 days of the date on which the adjustment is required to be made.



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1.5.7 The calculation of the adjustment of the exercise price and the exercise ratio pursuant to Clauses 1.5.1– 1.5.6 shall be independent from one another and the calculation shall be made in respective order of change. In the event that any two events or more occur at the same time, the calculation must be made in the following orders: Clause 1.5.1, Clause 1.5.5, Clause 1.5.4, Clause 1.5.2, Clause 1.5.3 and Clause 1.5.6., respectively. In calculating the adjustment in sequential order set forth, the exercise price and the exercise ratio shall be maintained in the maximum 3 digits of decimal.

1.5.8 The calculation of the adjustment of the exercise price and the exercise ratio pursuant to Clauses 1.5.1 – 1.5.6 shall not be changed in a way that will cause the exercise price to increase and/or the exercise ratio to decrease, except for the case of combining shares. In calculating the amount of money payable upon the exercise of the Warrants, such amount shall be calculated from the new exercise price after the adjustment (with maximum three digits of decimal) multiplied by the number of the ordinary shares (the number of the ordinary shares shall be calculated from the adjusted exercise ratio (with maximum three digits of decimal) multiplied by the number of the units of Warrants being exercised, any fraction of shares resulting from such calculation shall be rounded off). If there is a remainder less than THB 1, it shall be rounded off.

In this regard, if the adjustment made on the exercise price causes the new exercise price calculated based on the formula to be lower than the Company’s share par value the Company reserves the rights to only use the Company’s share par value as the new exercise price, unless the Company has accumulated loss. The adjusted exercise ratio shall be based on the result calculated based on 1.5.1 – 1.5.6.

1.5.9 In adjusting the exercise price and/or the exercise ratio pursuant to Clauses 1.5.1 – 1.5.6, the Company shall inform the SET through the Electronic Listed Companies Information Disclosure of the SET, the Office of the SEC, and the Warrants Registrar, the details on adjustment by stating the reasons for the adjustment, the details of the calculation of adjustment, adjusted exercise price, adjusted exercise ratio, the date on which the adjustment become effective and the number of warrants issued in place of the adjustment on exercise ratio, on the next day after the adjustment is in effect. In addition, the Company shall dispatch the amended Terms and Conditions to the Warrant Holders upon request within 15 days of the date on which the Company received such a request in writing from the Warrant Holders. The Company shall make available copies of the amended Terms and Conditions at the principal office of the Company and the principal office of the Agent Receiving Exercise Intention so that the Warrant Holders can inspect such copies of the amended Terms and Conditions on Business Days and during the business hours of the respective place.

## 1.6 Amendment to the Rights and Conditions of the Warrants

1.6.1 Adjustment specified in Clause 1.5 in the part that does lessen the rights of the Warrant Holders or to be in accordance with the provisions or criteria under the laws governing securities and exchange or any other applicable laws, rules, regulations or general orders as well as the relevant notifications and regulations of the Office of the SEC, the Company can make such an amendment without the consent of a meeting of the Warrant Holders after notified the Office of the SEC.

1.6.2 Any amendment of the Terms and Conditions other than those specified in Clause 1.6.1 requires the consent from the Company and a meeting of the Warrant Holders.

The amendment of these Terms and Conditions pursuant to this Clause 1.6.2, except the adjustment of rights specified in Clause 1.5, shall require the consent from a



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meeting of the Warrant Holders which shall be passed by the affirmative votes of not less than half of the total votes of the Warrant Holders attending the meeting and casting their votes.

In this respect, the Company shall notify the Office of the SEC, the SET and the Warrant Registrar of such an amendment to the Terms and Conditions and shall submit the amended Terms and Conditions within 15 days of the date on which these Terms and Conditions have been amended pursuant to Clauses 1.6.1 or 1.6.2, as the case may be.

- 1.6.3 Any amendment made to the Terms and Conditions shall not be in conflict or in consistent with the rules under the Notification No. TorChor. 34/2551 or any other relevant regulations, including any regulations added after the Company obtained approval from the Office of the SEC to issue and offer the Warrants, unless it is exemption.

### 1.7 Meeting of the Warrant Holders

Convening and/or holding the meeting of the Warrant Holders shall be carried out in accordance with the following provisions:

- 1.7.1 The Company shall be entitled to convene a meeting of the Warrant Holders at any time. However, the Company shall convene a meeting of the Warrant Holders, without delay, in order to obtain resolutions from the meeting for any further proceeding within 30 days of the date on which the Company becomes aware of an occurrence of any of the following events:

- (a) In the event that there is any proposal for amending any material part of these Terms and Conditions either by the Company or the Warrant Holders pursuant to Clause 1.6; or
- (b) In the event of a significant event is taking place which could materially affect the Warrant Holders or the ability of the Company in complying with their obligations under these Terms and Conditions.

In the event that the Company fails to convene the meeting within 30 days of the date on which the Company becomes aware of an occurrence of the event in (a) or (b) above, the Warrant Holders, holding in aggregate number of not less than 25 percent of the total units of Warrants that have not been exercised at that time, may request for the convening of the meeting of the Warrant Holders in which the letter must clearly specify the reason for requesting to convene such meeting. The Company shall then convene the meeting of the Warrant Holders within 30 days of the date on which the Company receives such a request from the Warrant Holders. If the Company does not convene the meeting within the specified period, the Warrant Holders shall be entitled to convene a meeting of the Warrant Holders themselves.

In convening a meeting of the Warrant Holders, the Company shall proceed the closure of the Register Book, for a period of no longer than 21 days prior to the date of the Warrant Holders' meeting, to determine the Warrant Holders entitled to attend and vote at the meeting.

- 1.7.2 In convening the meeting of the Warrant Holders, whether the meeting is convened by the request of the Warrant Holders (who have not yet exercised their rights or partly exercised their rights) or the resolution of the Board of Directors of the Company, the Company shall prepare notice of the meeting specifying the meeting venue, date, time and the name of the person requesting to convene such meeting as



well as the agenda being proposed to consider at the meeting, and dispatch such notice to each Warrant Holder (who have not yet exercised their rights or partly exercised their rights) according to the names and addresses appearing on the Register Book and disclose such information through the Electronic Listed Companies Information Disclosure of the SET, at least 7 days prior to the respective date of meeting.

- 1.7.3 At a meeting of the Warrant Holders, the Warrant Holders (who have not yet exercised their rights or partly exercised their rights) entitled to attend and vote at the meeting may appoint a proxy to attend and vote at the meeting on their behalf, by preparing a proxy form in accordance with the form specified by the Company and submitting such proxy to the chairman of the meeting or a person designated by the chairman of the meeting prior to the commencement of the meeting.

A Warrant Holder who is entitled to vote at a meeting of the Warrant Holders means a Warrant Holder who have not yet exercised their rights or partly exercised their rights, having their name appears in the Register Book on the closure date of the Register Book to determine the Warrant Holders entitled to attend the meeting, excluding any Warrant Holder who has a conflict of interest in any agenda to be considered and resolved at the meeting.

A Warrant Holder who has a conflict of interest under this Clause means a Warrant Holder who has a conflict of interest in the agenda to be considered and resolved at the meeting.

- 1.7.4 In voting, a Warrant Holder shall have votes in the number equivalent to the number of units of the Warrants held by him/her and one unit of Warrant shall carry one vote.
- 1.7.5 In carrying out a meeting of the Warrant Holders held by the Company, the Chairman of the Board of Directors of the Company or a person designated by the Chairman of the Board of Directors of the Company shall preside over a meeting of the Warrant Holders. If the Chairman of the Board of Directors or a person designated by the Chairman of the Board of Directors does not attend the meeting, the chairman of the meeting may be any person elected by the Warrant Holders attending the meeting. In both cases, the chairman of the meeting shall not have a casting vote in a case of tie vote.
- 1.7.6 The quorum of a meeting of the Warrant Holders shall be constituted upon the Warrant Holders who have not yet exercised their rights or partly exercised their rights and/or their proxies holding not less than 25 (twenty-five) Warrant Holders or not less than half of the total number of the Warrant Holders and the aggregate of the Warrants shall not be less than one-third of the total units of the Warrants not yet exercised their rights or partly exercised their rights.
- 1.7.7 At any meeting, if a quorum of the meeting does not constitute after 60 minutes passed the time scheduled for the meeting; it shall be deemed that the quorum of such meeting cannot be constituted and the meeting shall be suspended. In such case, if the meeting of the Warrant Holders is convened by the resolution of the Board of Directors, such meeting shall be re-convened within the period of no less than 7 days but no more than 14 days after the first convened meeting of the Warrant Holders. The Company shall dispatch the notice of the meeting to all Warrant Holders and disclose it to the SET in accordance with the details and methods specified above. In the latter meeting, the quorum is not required to be constituted.



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However, if the meeting of the Warrant Holders is convened upon request of the Warrant Holders and the quorum of such meeting cannot be constituted, the meeting shall be cancelled and there will be no re-convened meeting.

- 1.7.8 A resolution of a meeting of the Warrant Holders shall be passed by the affirmative votes of no less than half of the total votes of the Warrant Holders attending the meeting and eligible to vote.
- 1.7.9 Any resolution passed by a meeting of the Warrant Holders shall bind all Warrant Holders whether or not such Warrant Holders attended the meeting.
- 1.7.10 After the Company holds a meeting of the Warrant Holders, the Company shall disclose resolutions of the meeting to the Warrant Holders through Electronic Listed Companies Information Disclosure of the SET without delay.
- 1.7.11 The Company shall prepare and record minutes of a meeting of the Warrants Holders and keep such records at the principal office of the Company. The minutes of the meeting that were duly signed by the chairman of the meeting shall be deemed the valid evidence of all agenda discussed at the meeting, and it shall also be deemed that the meeting and all resolutions have been duly made. The Company shall submit the minutes of such meeting to the SET and the Office of the SEC within 14 days of the date of the meeting of the Warrant Holders.
- 1.7.12 At a meeting of the Warrant Holders, the Company or any person authorized by the Company and the legal advisor of the Company shall be entitled to attend the meeting to provide an opinion or give an explanation to the meeting of the Warrant Holders.
- 1.7.13 The Company shall be responsible for all expenses incurred from convening the meeting of the Warrant Holders.
- 1.7.14 The Company shall amend the Terms and Conditions in accordance with the resolutions of the meeting of the Warrant Holders with the effect from the date of the meeting passing the respective resolutions. The Company shall notify the Office of the SEC, the SET and the Warrant Registrar of such amendment of the Terms and Conditions in writing within 15 days of the date of such amendment, provided that the Company shall notify the Warrant Holders through the electronic information disclosure of the SET on the same day when the Company notifies the SEC, the SET and the Warrant Registrar.
- 1.7.15 In case the meeting cannot be convened within the term of the Warrant, it shall be deemed that such meeting is terminated and has never been held.

**1.8 Compensation where the Company is unable to provide the newly issued ordinary shares upon the exercise of Warrants**

The Company shall make compensation to the Warrant Holders as follows:

- 1.8.1 The Company will make compensation to the Warrant Holders who notify their intention to exercise the Warrants on each Exercise Date but the Company is unable to provide them with sufficient number of the Underlying Shares to accommodate the exercise of rights under the Warrants. The compensation payable by the Company to such Warrant Holders shall be calculated in accordance with the formula set forth in Clause 1.8.3, save for the cases of the Company is unable to issue the ordinary shares to the Warrant Holders due to the limitation on the foreign shareholding set out in Clause 2 below, the Company shall not be liable to make compensation to the Warrant Holders.



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1.8.2 With respect to the compensation set out in Clause 1.8.1, the Company will make compensation to the Warrant Holders within 30 days from the respective Exercise Date in accordance with the procedures and conditions prescribed by the Company and/or the Agent Receiving Exercise Intention. Where the Company fails to make compensation to the Warrant Holders within such period, the Warrant Holders shall be entitled to receive the interest at the rate of 7.5 percent per annum, calculated from the date over the period of 30 days to the date on which the Warrant Holders receive compensation.

However, in any case, if the cheque, draft, bank's note or bank's payment order which has been crossed and made payable to the Warrant Holder and have been duly dispatched to the Warrant Holder via the registered mail to the address specified in the Warrant Exercise Intention Notification, it shall be deemed that the Warrant Holder has duly received such compensation and shall no longer be entitled to claim any interest and/or damages whatsoever.

1.8.3 The compensation that the Company will pay to the Warrant Holders pursuant to Clause 1.8.1 shall be calculated in accordance with the following formula:

$$\text{Compensation per 1 (one) unit of Warrant} = B \times [MP - EP]$$

Whereas,

B	represents	the number of the ordinary shares which the Company cannot provide and/or increase in corresponding with the adjustment of the exercise ratio calculated per 1 (one) unit of Warrant;
MP	represents	the market price of the Company's ordinary shares which is calculated from the total trading price of the Company's ordinary shares divided by the number of the Company's ordinary shares traded on the SET during the period of 5 consecutive Business Days prior to the respective Exercise Date on which the Warrant Holder notifies the intention to exercise the Warrants;
EP	represents	the exercise price in accordance with the Warrants or the exercise price which has been adjusted in accordance with the conditions concerning the rights adjustment (if any).

1.8.4 Compensation made under this Clause shall be deemed final.

1.8.5 Nonetheless, in case the foreign Warrant Holders (both individuals and legal entities) are unable to exercise the Warrants due to the foreign shareholding restrictions under which the Company's Articles of Association provides that "the Company's shares can be freely transferred without any restriction, unless such transfer will result in foreigner(s) holding shares in the Company exceeding 49 percent of the total issued shares of the Company. The Company reserves the right to refuse to register any transfer of shares that would result in foreigner(s) holding shares in the Company exceeding such foreign shareholding limit". In such case, the Company shall neither compensate nor take any remedy action to such foreign Warrant Holders, and such foreign Warrant Holders shall not be entitled to claim for any damages or compensation from the Company.



*[Handwritten signature]*



**1.9 Status of the Warrant Holders during the notification of the intention to exercise the Warrants and the registration date of the paid-up capital increase**

During the date on which the Warrant Holders having notified the intention to exercise the Warrants and the date before the Ministry of Commerce accepting the registration of the paid-up capital increase in corresponding to the exercise of the Warrants, the status of the Warrants shall remain the same as that of the non-exercised Warrants and such status will be terminated on the date that the Ministry of Commerce accepts the registration of the paid-up capital increase in corresponding to the exercise of the Warrants. In the event that the Company adjusts the exercise price and/or the exercise ratio during the period that the Company has not yet registered the newly issued ordinary shares upon the exercise of the Warrants with the Ministry of Commerce, the Warrant Holders who have already exercised the rights shall receive retroactive rights adjustment. The Company will, as soon as possible, issue additional newly issued ordinary shares to the Warrant Holders in the number that such Warrant Holders shall be entitled to receive where the adjusted exercise price is in effect. However, the Warrant Holders may receive the additional ordinary shares later than those ordinary shares which were previously allotted but, in any cases, no later than 45 days of the date of the rights adjustment.

**1.10 Status of the new ordinary shares issued from the exercise of Warrants**

The Company shall apply for the registration to change its paid-up capital with the Ministry of Commerce in accordance with the number of newly issued ordinary shares from each exercise within 14 days of the date on which the Company receives the payment of shares pursuant to each exercise. In addition, the Company shall proceed with the registration of the Warrant Holders who exercise their Warrants as the shareholders of the Company in the Register Book in accordance with the number of ordinary shares calculated from such exercise.

Ordinary shares issued from the exercise of the Warrants shall carry the same rights in all respects as the existing ordinary shares of the Company from the date on which the registration of the name of the Warrant Holders and the substitute holders as the shareholders of the Company and the Ministry of Commerce accepts the registration of the increase of paid-up capital from the issuance of newly issued shares upon the exercise of Warrants.

**1.11 Resolution of the shareholders' meeting approving the issuance of the newly issued ordinary shares to accommodate the exercise of Warrants**

The Extraordinary General Meeting of Shareholders No.1/2023 which was held on December 21, 2023, resolved to approve the allocation of not exceeding 2,029,494,045 shares, with a par value of 0.10 THB per share, or equivalent to 46.57 percent of the number of the total newly issued and paid-up ordinary shares, reserved to accommodate the exercise of Warrants.

**1.12 Details of the newly issued ordinary shares reserved to accommodate the exercise of Warrants**

Number of the newly issued ordinary shares reserved to accommodate the exercise of Warrants	Not exceeding 2,029,494,045	shares
Par value	0.10	THB
Exercise price per share	1.50	THB
Total value of shares (in case of fully exercise)	3,044,241,067.50	THB



**1.13 Procedures in case of remaining reserved ordinary shares from the exercise of Warrants**

In case there are ordinary shares remaining from the exercise of Warrants, the Board of Directors or the Executive Committee shall propose that the shareholders' meeting consider and further allocate the remaining shares from the exercise of Warrants or undertake any other actions pursuant to the criteria, conditions and procedures prescribed in the Public Limited Companies Act, the relevant notifications of the SET and the relevant notifications of the Office of the Securities and Exchange Commission.

**1.14 Secondary market of the offered Warrants**

The Company shall submit an application for listing the Warrants as the securities on the SET within 30 days of the date on which the Company completes the allocation of the Warrants.

**1.15 Secondary market of the new ordinary shares issued from the exercise of Warrants**

The Company shall apply for the listing of the ordinary shares issued from the exercise of Warrants on the SET within 30 days of each Exercise Date, provided that in order for the ordinary shares to be tradable on the SET as the existing ordinary shares of the Company.

**2 Restrictions on the transfer of Warrants**

**2.1 Restrictions on the transfer of Warrants**

The Company has no restriction on the transfer of the Warrants, except for the case which the transfer is made during the closure of the Register Book, provided that the Company shall close the Register Book for the period of 21 days before the Last Exercise Date and the SET shall pose SP sign (suspension for sales and purchase) for the period of 2 Business Days prior to the date of closure of Register Book.

Where the Last Exercise Date falls on the date on which the SET is closed for business, the Register Book shall be closed by 21 days prior to the last Business Day before the Last Exercise Date.

**2.2 Non-Thai Entities**

The Company has a restriction on shareholding ratio of non-Thai person as described in the Company's Articles of Association concerning the shareholding ratio of non-Thai person. The Company shall not issue the newly issued ordinary shares to non-Thai warrant holders, if such exercise will cause the shareholding ratio of non-Thai individuals or non-Thai legal entities to exceed 49 percent of the total issued and paid-up shares of the Company as stipulated in the Company's current Articles of Association or in any ratio which may be adjusted in the future. In this regard, the Company shall issue ordinary shares in an amount which will not violate the restriction, whereby the Warrant Holders may have the Company to take any of the following actions:

- 2.2.1 The Company to return to such non-Thai Warrant Holders the Warrants and the money remaining from the exercise price of the Warrants, in the part that cannot be exercised, without any interest, by cheque, crossed and made payable to the receiver, via registered mail within 14 Business Days of the respective Exercise Date.





- 2.2.2 The Company to act as the holder of the notification of the intention to exercise the Warrants and the money pursuant to the exercise of Warrants which the non-Thai Warrant Holders notify intention to exercise the Warrants in the unexercised part in sequential order, in order for unexercised Warrants upon the issuance of shares for the Warrant to such non-Thai Warrant Holders to be exercised without any violation to the restriction.

In this regard, the non-Thai Warrant Holders shall notify their intention to have the Company proceed on the actions set out in Clause 2.2.2 above, by specifying the intention in the notification of the intention to exercise the Warrants as at each Exercise Date.

The Company shall allow the exercise of Warrants in the part which have not been exercised or partly exercise on the first Exercise Date to the extent that it does not violate such restriction. Nevertheless, if the number of Warrants pending for exercise as at the first Exercise Date is more than the number of ordinary shares issuable from the Company without violating the restriction, the Company shall proceed on exercise of Warrants in place of the non-Thai Warrant Holders in a sequential order as set out in this Clause 2.2.2. At the Last Exercise Date, if the Warrant Holder is unable to exercise the Warrant due to the limitation on foreign shareholding, it shall be deemed that such Warrants are expired and the Warrant Holder shall have no rights to claim any interest and/or damages, and the Company is not obligated to any damages in respect thereof.

- 2.2.3 In any cases, the non-Thai Warrant Holders shall not receive any compensation howsoever, in case their Warrants cannot be exercised due to the limitation on the foreign shareholding.

### 3 Delivery procedure of securities issued from the exercise of Warrants

With respect to the exercise of Warrants to purchase the newly issued shares of the Company, the Warrant Holders may have the Company to carry out any of the following delivery procedures:

- 3.1 If the Warrant Holder intends to receive the share certificates as his/her name, the Securities Depository shall deliver to the Warrant Holder the share certificates pursuant to the number of shares exercised via registered mail according to the names and addresses appearing on the Register Book, within 15 Business Days of the date of each Exercise Date. In such case, the Warrant Holder may not sell any ordinary shares issued from the exercise on the SET until he/she receives the share certificates, whereas the Warrant Holder may receive the share certificate after the ordinary shares issued from the exercise are listed on the SET.
- 3.2 If the Warrant Holder does not intend to receive the shares in the form of share certificates, but intend to use the service of the Securities Depository by depositing the ordinary shares issued from the exercise to the account of the securities company of which he/she had the securities trading account opened. In such case, the Securities Depository shall deposit the ordinary shares issued from the exercise with "Thailand Securities Depository Co., Ltd. for the Depositor" and the Securities Depository shall record the balance of number of ordinary shares deposited by such securities company within 7 Business Days of each Exercise Date, provided that the Warrant Holder can sell the ordinary shares issued from the exercise on the SET as soon as the SET grants an approval to trade on the SET.



*[Handwritten signature]*

In this case, the name of the Warrant Holders must be the same as the owner of the securities trading account who wishes to deposit the ordinary shares in such account, otherwise the Company shall reserve the rights to issue the share certificates to the Warrant Holders in a manner of Clause 3.1 instead.

- 3.3** If the Warrant Holder does not intend to receive the shares in the form of share certificates, but intend to use the service of the Securities Depository by depositing the ordinary shares issued from the exercise to the securities issuer account No. 600, the Company shall deposit the ordinary shares issued from the exercise with the Securities Depository and the Securities Depository shall record the balance of number of ordinary shares in the securities issuer account No. 600 and issue the deposit evidence to the Warrant Holders within 7 Business Days of each Exercise Date. If the Warrant Holder who receive the shares issued from the exercise, wishes to sell the shares, he/she shall withdraw the shares from the account No. 600 by contacting to the general securities company, whereby this may incur transaction fee as specified by the Securities Depository and/or the securities company, provided that the Warrant Holder can sell the ordinary shares issued from the exercise on the SET as soon as the SET grants an approval to trade on the SET and the shares are withdrawn from the account No. 600.

#### **4 Effectiveness of the Terms and Conditions and applicable law**

The Terms and Conditions shall be in full force and effective from the issuance date of the Warrants until the Last Exercise Date. These Terms and Conditions shall be governed and construed in accordance with the laws of Thailand, and if any content in these Terms and Conditions is in conflict with any applicable law or any notification, the content in such law or notification shall prevail only in place of the conflicting content.



Warrants Issuer

**Roctec Global Public Company Limited**

(Mrs. Suparanan Tanviruch) (Mr. Warawut Natpradith)

Authorized Directors



**รายงานการปฏิบัติตามเงื่อนไขการอนุญาต (checklist)**  
**สำหรับการเสนอขายใบสำคัญแสดงสิทธิที่จะซื้อหุ้น (“warrant”)**  
**และหุ้นที่ออกใหม่เพื่อรองรับ warrant (“หุ้นรองรับ”)**

บริษัทที่ออกหลักทรัพย์ (“บริษัท”) บริษัท ร็อกเทค โกลบอล จำกัด (มหาชน)

- เป็นบริษัทจดทะเบียนในตลาดหลักทรัพย์แห่งประเทศไทย (“บจ.”)
- เป็นบริษัทมหาชนจำกัดที่จัดตั้งตามกฎหมายไทยและมีหน้าที่ตามมาตรา 56 (ที่ไม่ใช่ บจ.)

**ลักษณะการเสนอขาย**

- การเสนอขายต่อผู้ถือหุ้นของบริษัทตามสัดส่วนการถือหุ้น (Right Offering – “RO”) โดยผู้ที่จะใช้สิทธิอาจไม่ใช่ผู้ถือหุ้นของบริษัท
- การเสนอขายต่อผู้ถือหุ้นของบริษัทตามสัดส่วนการถือหุ้น โดยไม่เสนอขายให้แก่ผู้ถือหุ้นที่ทำให้บริษัทมีหน้าที่ตามกฎหมายต่างประเทศ (Preferential Public Offering – “PPO”) และผู้ที่จะใช้สิทธิอาจไม่ใช่ผู้ถือหุ้นของบริษัท

**รายละเอียดของ warrant**

- ชื่อ warrant ใบสำคัญแสดงสิทธิที่จะซื้อหุ้นสามัญของบริษัท ร็อกเทค โกลบอล จำกัด (มหาชน) ครั้งที่ 5 (ROCTEC-W5)
- เสนอขายให้แก่ผู้ถือหุ้นของบริษัทที่มีรายชื่อ ณ วันที่ 4 มกราคม 2567
- วันที่เสนอขาย warrant 6 กุมภาพันธ์ 2567
- วันสิ้นสุดอายุ warrant 5 กุมภาพันธ์ 2570
- จำนวน warrant ที่เสนอขาย ไม่เกิน 2,029,494,045 หน่วย
- วันใช้สิทธิครั้งสุดท้าย 5 กุมภาพันธ์ 2570
- ราคาที่เสนอขาย 0 บาทต่อหน่วย (ไม่คิดมูลค่า)
- จำนวนหุ้นรองรับ ไม่เกิน 2,029,494,045 หุ้น
- อัตราการใช้สิทธิ ใบสำคัญแสดงสิทธิ 1 หน่วย มีสิทธิซื้อหุ้นสามัญเพิ่มทุนได้ 1 หุ้น
- ราคาใช้สิทธิ 1.50 บาท

Checklist	ครบถ้วน ตามเกณฑ์ <sup>1</sup>	เอกสารอ้างอิง (ชื่อ/หน้า)
<b>1. ลักษณะของ warrant</b>		
<p>1.1 สัดส่วนจำนวนหุ้นรองรับต่อจำนวนหุ้นที่จำหน่ายได้ แล้วทั้งหมดของบริษัท<sup>2</sup> เท่ากับ</p> <p><input checked="" type="checkbox"/> <math>\leq 50\%</math></p> <p><input type="checkbox"/> <math>&gt; 50\%</math> เฉพาะเป็นการออก warrant ในกรณีใดกรณี หนึ่งต่อไปนี้ ที่ได้รับผ่อนผันจากสำนักงานก่อนการเสนอขายตาม หนังสือที่ _____ ลงวันที่ _____</p> <p>(1) บริษัทอยู่ในภาวะที่มีความจำเป็นต้องได้รับความ ช่วยเหลือทางการเงิน</p> <p>(2) เพื่อประโยชน์ในการปรับโครงสร้างหนี้ของบริษัท</p> <p>(3) กรณีที่มีเหตุจำเป็นและสมควร และเป็นไปเพื่อ ประโยชน์ของบริษัทและผู้ถือหุ้นโดยรวม</p>	✓	ข้อกำหนดสิทธิ (หน้าที่ 5 ข้อ 1.1 ลักษณะสำคัญของ ใบสำคัญแสดงสิทธิ - จำนวนหุ้นสามัญที่ จัดสรรไว้เพื่อ รองรับ)
<p>1.2 มีอายุแน่นอน ซึ่ง <math>\leq 10</math> ปี นับแต่วันที่ออก warrant (วันที่ <u>6 กุมภาพันธ์ 2567</u>)</p>	✓	ข้อกำหนดสิทธิ (หน้าที่ 4 ข้อ 1.1 ลักษณะสำคัญของ ใบสำคัญแสดงสิทธิ - อายุของใบสำคัญ แสดงสิทธิ)
<p>1.3 กำหนดราคา และอัตราการใช้สิทธิไว้แน่นอน เว้น แต่มีการปรับสิทธิตามข้อกำหนดสิทธิ</p>	✓	ข้อกำหนดสิทธิ (หน้าที่ 4 ข้อ 1.1 ลักษณะสำคัญของ ใบสำคัญแสดงสิทธิ)

<sup>1</sup> ให้ระบุ N/A หากเกณฑ์ในข้อใดไม่สามารถ apply กับกรณีของบริษัทได้

<sup>2</sup> วิธีการคำนวณสัดส่วนจำนวนหุ้นรองรับ :

$$\text{((จำนวนหุ้นรองรับ warrant ที่เสนอขายในครั้งนี) + (จำนวนหุ้นรองรับ CD หรือ warrant ที่เสนอขายในครั้งอื่น*} \\ \text{ซึ่งไม่รวมหุ้นที่จัดไว้รองรับ ESOP-CD หรือ ESOP-warrant))}$$

(จำนวนหุ้นที่จำหน่ายได้แล้วทั้งหมดของบริษัท ซึ่งรวมจำนวนหุ้นที่จะออกใหม่อื่นที่บริษัทจะเสนอขายควบคู่กับ warrant ในครั้งนี้)

\* เฉพาะจำนวนหุ้นรองรับที่ outstanding หนึ่ง หากในการประชุมผู้ถือหุ้นเพื่อมีมติออก warrant ในครั้งนี้ ผู้ถือหุ้นมีมติให้  
เพิ่มจำนวนหุ้นรองรับการปรับสิทธิในหลักทรัพย์แปลงสภาพที่เสนอขายในครั้งอื่น หรือผู้ถือหุ้นมีมติในวาระอื่นใดที่อาจทำให้จำนวนหุ้น  
รองรับ outstanding ที่จะต้องนำมาคำนวณเพิ่มขึ้น เช่น การจ่ายเงินปันผลเกินกว่าที่กำหนด ซึ่งเป็นผลให้ต้องมีการปรับสิทธิในหลักทรัพย์  
แปลงสภาพที่เสนอขายในครั้งอื่น เป็นต้น บริษัทต้องนำหุ้นรองรับที่อาจเพิ่มขึ้นดังกล่าวมารวมคำนวณด้วย

ทั้งนี้ CD = หุ้นกู้แปลงสภาพ ESOP = การเสนอขายหลักทรัพย์แก่กรรมการหรือพนักงานตามประกาศคณะกรรมการกำกับตลาดทุน  
เกี่ยวกับการเสนอขายหลักทรัพย์ที่ออกใหม่ต่อกรรมการหรือพนักงาน



Checklist	ครบถ้วน ตามเกณฑ์ <sup>1</sup>	เอกสารอ้างอิง (ชื่อ/หน้า)
		ที่ออก - อัตราการใช้สิทธิ และราคาการใช้สิทธิ)
1.4 มีระยะเวลาให้แสดงความจำนงในการใช้สิทธิครั้งสุดท้าย $\geq 15$ วันก่อนวันใช้สิทธิ <sup>3</sup> (เว้นแต่แปลงสภาพตามข้อกำหนดบังคับใช้สิทธิ)	✓	ข้อกำหนดสิทธิ (หน้าที่ 5 ข้อ 1.1 ลักษณะสำคัญของใบสำคัญแสดงสิทธิที่ออก - ระยะเวลาการแจ้งความจำนงในการใช้สิทธิ และหน้าที่ 11 ข้อ 1.4.3 - ระยะเวลาการแจ้งความจำนงในการใช้สิทธิ)
1.5 กำหนดให้มีการใช้สิทธิซื้อหุ้นรองรับให้แล้วเสร็จภายในอายุ warrant	✓	ข้อกำหนดสิทธิ (หน้าที่ 11 ข้อ 1.4.2 - การใช้สิทธิซื้อหุ้นสามัญเพิ่มทุน)
<b>2. หนังสือนัดประชุมผู้ถือหุ้น ได้แสดงข้อมูลอย่างน้อย ดังนี้</b>		
2.1 ข้อมูลเบื้องต้นเกี่ยวกับ warrant เช่น		
- ราคาหรืออัตราที่คาดว่าจะเป็นราคาหรืออัตราการใช้สิทธิ	✓	หนังสือเชิญประชุมผู้ถือหุ้น : สิ่งที่ส่งมาด้วย 2 (หน้าที่ 2 หัวข้อ - อัตราการใช้สิทธิ และราคาการใช้สิทธิ)
- ระยะเวลาการใช้สิทธิ	✓	หนังสือเชิญประชุมผู้ถือหุ้น : สิ่งที่ส่งมาด้วย 2 (หน้าที่ 2 หัวข้อ - ระยะเวลาการใช้สิทธิ)

<sup>1</sup> ไม่รวมวันใช้สิทธิ

Checklist	ครบถ้วน ตามเกณฑ์ <sup>1</sup>	เอกสารอ้างอิง (ชื่อ/หน้า)
- วันสิ้นสุดของการใช้สิทธิ	✓	หนังสือเชิญประชุม ผู้ถือหุ้น : สิ่งที่ส่งมา ด้วย 2 (หน้าที่ 2 หัวข้อ - ระยะเวลา การใช้สิทธิ)
- เหตุให้ต้องออกหุ้นใหม่เพื่อรองรับการปรับสิทธิ	✓	หนังสือเชิญประชุม ผู้ถือหุ้น : สิ่งที่ส่งมา ด้วย 2 (หน้าที่ 2-3 หัวข้อ - เหตุในการ ต้องออกหุ้นใหม่เพื่อ รองรับการ เปลี่ยนแปลงการใช้ สิทธิ)
- อื่น ๆ (ถ้ามี) ระบุ _____		
2.2 ผลกระทบต่อผู้ถือหุ้น (dilution effect) หากมีการใช้สิทธิ ครบถ้วน โดยได้ระบุ		
(1) price dilution <sup>4</sup>	✓	หนังสือเชิญประชุม ผู้ถือหุ้น : สิ่งที่ส่งมา ด้วย 2 (หน้าที่ 5 หัวข้อ - ผลกระทบ ต่อผู้ถือหุ้น)
(2) earning per share dilution <sup>5</sup> หรือ control dilution <sup>6</sup>	✓	หนังสือเชิญประชุม ผู้ถือหุ้น : สิ่งที่ส่งมา

$$^4 \text{ Price dilution} = \frac{\text{ราคาตลาดก่อนเสนอขาย} - \text{ราคาตลาดหลังเสนอขาย}}{\text{ราคาตลาดก่อนเสนอขาย}}$$

$$\text{โดยราคาตลาดหลังเสนอขาย} = \frac{(\text{ราคาตลาดก่อนเสนอขาย} \times \text{จำนวนหุ้น paid-up}) + (\text{ราคาใช้สิทธิ} \times \text{จำนวนหุ้นรองรับที่เสนอขายครั้งนี้})}{\text{จำนวนหุ้น paid-up} + \text{จำนวนหุ้นรองรับที่เสนอขายครั้งนี้}}$$

$$^5 \text{ Earnings per share dilution} = \frac{\text{Earning per share ก่อนเสนอขาย} - \text{Earning per share หลังเสนอขาย}}{\text{Earning per share ก่อนเสนอขาย}}$$

$$\text{โดย Earning per share ก่อนเสนอขาย} = \frac{\text{กำไรสุทธิ}}{\text{จำนวนหุ้น paid-up}}$$

$$\text{Earnings per share หลังเสนอขาย} = \frac{\text{กำไรสุทธิ}}{(\text{จำนวนหุ้น paid-up} + \text{จำนวนหุ้นรองรับที่เสนอขายครั้งนี้})}$$

$$^6 \text{ Control dilution} = \frac{\text{จำนวนหุ้นรองรับที่เสนอขายครั้งนี้}}{\text{จำนวนหุ้น paid-up} + \text{จำนวนหุ้นรองรับที่เสนอขายครั้งนี้}}$$



Checklist	ครบถ้วน ตามเกณฑ์ <sup>1</sup>	เอกสารอ้างอิง (ข้อ/หน้า)
		ด้วย 2 (หน้าที่ 5-6 หัวข้อ - ผลกระทบ ต่อผู้ถือหุ้น)
2.3 วิธีการจัดสรร warrant	✓	หนังสือเชิญประชุม ผู้ถือหุ้น สิ่งส่งมา ด้วย 2 (หน้าที่ 1-2 หัวข้อ - วิธีการ จัดสรร)
2.4 ข้อมูลอื่น ๆ (ถ้ามี) ระบุ _____		
<b>3. มติที่ประชุมผู้ถือหุ้นและอายุมติ</b>		
3.1 บริษัทได้รับมติที่ประชุมผู้ถือหุ้น ให้ออกหุ้นรองรับอย่าง เพียงพอ	✓	รายงานการประชุม วิสามัญผู้ถือหุ้น ครั้ง ที่ 1/2566 เมื่อวันที่ 21 ธันวาคม 2566 (วาระที่ 8 หน้า 18- 19 และ วาระที่ 10 หน้า 21-23)
3.2 บริษัทได้เสนอขาย warrant แล้วเสร็จภายใน 1 ปีนับแต่ วันที่ที่ประชุมผู้ถือหุ้นมีมติอนุมัติให้เสนอขายแบบ RO หรือ ภายใน 6 เดือนนับแต่วันที่ที่ประชุมผู้ถือหุ้นอนุมัติให้เสนอขาย แบบ PPO (ผู้ถือหุ้นอนุมัติเมื่อวันที่ 21 ธันวาคม 2566 และ บริษัทฯ ออกไปสำคัญแสดงสิทธิในวันที่ 6 กุมภาพันธ์ 2567)	✓	ข้อกำหนดสิทธิ (หน้าที่ 4 ข้อ 1.1 ลักษณะสำคัญของ ใบสำคัญแสดงสิทธิ ที่ออก - วัน ออก ใบสำคัญแสดงสิทธิ)
<b>4. ข้อกำหนดสิทธิของ warrant มีรายการอย่างน้อย ดังนี้</b>		
4.1 รายละเอียดของ warrant โดยมีรายละเอียดดังต่อไปนี้		
(1) อายุของ warrant ระบุ _____ 3 _____ ปี	✓	ข้อกำหนดสิทธิ (หน้าที่ 4 ข้อ 1.1 ลักษณะของ ใบสำคัญแสดงสิทธิ ที่ออก - อายุของ ใบสำคัญแสดงสิทธิ)
(2) ราคาเสนอขาย warrant และราคาใช้สิทธิซื้อหุ้น	✓	ข้อกำหนดสิทธิ (หน้าที่ 4 ข้อ 1.1 ลักษณะของ

Checklist	ครบถ้วน ตามเกณฑ์	เอกสารอ้างอิง (ข้อ/หน้า)
		ใบสำคัญแสดงสิทธิ ที่ออก - ราคาเสนอ ขายต่อหน่วย และ ราคาการใช้สิทธิ)
(3) อัตราการใช้สิทธิ	✓	ข้อกำหนดสิทธิ (หน้าที่ 4 ข้อ 1.1 ลักษณะของ ใบสำคัญแสดงสิทธิ ที่ออก - อัตราการใช้ สิทธิ)
(4) วิธีการใช้สิทธิของ warrant เช่น ใช้สิทธิได้ทุก วันสุดท้ายของแต่ละไตรมาส	✓	ข้อกำหนดสิทธิ (หน้าที่ 9-11 ข้อ 1.4.1 - วัน กำหนดการใช้สิทธิ ซื้อหุ้นสามัญเพิ่มทุน /หน้าที่ 11 ข้อ 1.4.2 - การใช้สิทธิซื้อหุ้น สามัญเพิ่มทุน / และ หน้าที่ 11-12 ข้อ 1.4.3 - ระยะเวลา การแจ้งความจำนง ในการใช้สิทธิ)
(5) รายละเอียดสำคัญอื่น (ถ้ามี) ระบุ _____		
4.2 เหตุ เงื่อนไข และกระบวนการในการแก้ไขเพิ่มเติม ข้อกำหนดตาม warrant	✓	ข้อกำหนดสิทธิ (หน้าที่ 20-27 ข้อ 1.5 - เงื่อนไขการ ปรับสิทธิของ ใบสำคัญแสดงสิทธิ / และหน้าที่ 27-28 ข้อ 1.6 - การแก้ไข เพิ่มเติมสิทธิและ เงื่อนไขของ



Checklist	ครบถ้วน ตามเกณฑ์ <sup>1</sup>	เอกสารอ้างอิง (ชื่อ/หน้า)
		ใบสำคัญแสดงสิทธิ)
4.3 ค่าเสียหายที่ผู้ถือ warrant จะได้รับในกรณีที่บริษัทไม่สามารถจัดให้มีหุ้นรองรับได้ ซึ่งต้องไม่ต่ำกว่าส่วนต่างระหว่างราคาตลาดของหุ้นของบริษัทกับราคาใช้สิทธิ	✓	ข้อกำหนดสิทธิ (หน้าที่ 31-32 ข้อ 1.8 - การชดเชยค่าเสียหาย กรณีที่บริษัทฯ ไม่สามารถจัดให้มีหุ้นเพื่อรองรับการใช้สิทธิ)
4.4 มาตรการคุ้มครองผู้ถือ warrant ซึ่งมีข้อกำหนดดังนี้		
(1) กรณีมีข้อกำหนดให้บริษัทสามารถเรียกให้ผู้ถือ warrant ใช้สิทธิก่อนกำหนด บริษัทรับรองว่า ข้อกำหนดดังกล่าว	บริษัทฯ ไม่มีกำหนดให้ผู้ถือใบสำคัญแสดงสิทธิใช้สิทธิก่อนกำหนด	
(ก) มีความเป็นธรรม ชัดเจน และเหตุแห่งการเรียกให้ใช้สิทธิก่อนกำหนดดังกล่าวต้องอ้างอิงเหตุการณ์หรือการกระทำที่ไม่อยู่ในอำนาจควบคุมของบุคคลใด ๆ		
(ข) กำหนดให้บริษัท ต้องเรียกให้มีการใช้สิทธิเมื่อมีเหตุการณ์ที่กำหนดไว้		
(ค) มีมาตรการที่เพียงพอซึ่งทำให้ผู้ถือ warrant ในทอดต่อ ๆ ไปทราบถึงข้อกำหนดดังกล่าว		
(2) กำหนดเหตุและเงื่อนไขในการปรับสิทธิในกรณีดังต่อไปนี้พร้อมทั้งระบุวิธีการคำนวณ	✓	ข้อกำหนดสิทธิ (หน้าที่ 20-27 ข้อ 1.5 - เงื่อนไขการปรับสิทธิของใบสำคัญแสดงสิทธิ)
(ก) เมื่อมีการเปลี่ยนแปลง par value หุ้นของบริษัท อันเป็นผลมาจากการรวมหุ้นหรือแบ่งแยกหุ้น		

Checklist	ครบถ้วน ตามเกณฑ์ <sup>7</sup>	เอกสารอ้างอิง (ข้อ/หน้า)
(ข) เมื่อบริษัทเสนอขายหุ้นที่ออกใหม่ในราคาต่ำกว่าราคาตลาด <sup>7</sup>		
(ค) เมื่อบริษัทเสนอขาย CD หรือ warrant ในราคาต่ำกว่าราคาตลาด <sup>7</sup>		
(ง) เมื่อบริษัทจ่ายเงินปันผลทั้งหมดหรือบางส่วนเป็นหุ้นที่ออกใหม่ให้แก่ผู้ถือหุ้น		
(จ) เมื่อบริษัทจ่ายเงินปันผลเป็นเงินซึ่งเกินกว่าอัตราที่ระบุไว้ในข้อกำหนดสิทธิ		
(ฉ) เมื่อมีกรณีอื่นใดในลักษณะเดียวกับ (ก) ถึง (จ) ที่ทำให้ผลประโยชน์ตอบแทนใด ๆ ที่ผู้ถือ warrant จะได้รับเมื่อมีการใช้สิทธิค่อยไปกว่าเดิม		
<p>กรณีการปรับสิทธิตามข้อ (ข) และ (ค) บริษัทได้ระบุส่วนลดจากราคาตลาด พร้อมกับวิธีการคำนวณราคาเสนอขายและราคาตลาดในข้อกำหนดสิทธิแล้ว</p> <p>ทั้งนี้ หากบริษัทจะไม่ดำเนินการปรับสิทธิเมื่อเกิดเหตุการณ์ตาม (ก)-(ฉ) บริษัทได้รับผ่อนผันจากสำนักงานก่อนการเสนอขายแล้ว ตามหนังสือที่ _____ ลงวันที่ _____</p>		
<b>5. การดำเนินการภายหลังการเสนอขาย warrant</b>		
<p>5.1 บริษัทระบุไว้ในการเสนอขาย warrant ว่า จะปรับสิทธิโดยวิธีใดวิธีหนึ่งดังนี้</p> <p>(1) ปรับราคาและอัตราการใช้สิทธิ หรือ</p> <p>(2) ปรับราคาใช้สิทธิ ควบคู่กับการออก warrant ใหม่ทดแทนการปรับอัตราการใช้สิทธิ</p> <p>ทั้งนี้ หากบริษัทต้องออกหุ้นรองรับเพิ่มเติม บริษัทต้องยื่นมติที่ประชุมผู้ถือหุ้นที่อนุมัติให้ออกหุ้นรองรับการปรับสิทธิ นั้นอย่างเพียงพอต่อสำนักงานก่อนการปรับสิทธิ จึงจะถือว่าบริษัทได้รับอนุญาตให้เสนอขายหุ้นรองรับ</p>	✓	ข้อกำหนดสิทธิ (หน้าที่ 20-27 ข้อ 1.5 - เงื่อนไขการปรับสิทธิของใบสำคัญแสดงสิทธิ)

<sup>7</sup> คือ การเสนอขายหลักทรัพย์โดยมีราคาเสนอขายต่ำกว่าราคาตลาดเกิน 10% โดยมีวิธีการคำนวณราคาเสนอขายและราคาตลาดตามหมายเหตุ



Checklist	ครบถ้วน ตามเกณฑ์ <sup>1</sup>	เอกสารอ้างอิง (ชื่อ/หน้า)
5.2 บริษัทระบุไว้ในการเสนอขาย warrant ว่าจะไม่ขยายอายุ warrant และไม่แก้ไขเปลี่ยนแปลงราคาและอัตราการใช้สิทธิ เว้นแต่จะเป็นการปรับสิทธิตามที่กำหนดในข้อ 4.4 (2)	✓	ข้อกำหนดสิทธิ (หน้าที่ 4 ข้อ 1.1 ลักษณะของใบสำคัญแสดงสิทธิที่ออก - อัตราการใช้สิทธิ ราคาการใช้สิทธิ และอายุของใบสำคัญแสดงสิทธิ)

บริษัทขอเรียนว่า บริษัทรับทราบและเข้าใจเงื่อนไขที่ต้องปฏิบัติตามที่ประกาศคณะกรรมการกำกับตลาดทุนเกี่ยวกับการขออนุญาตและการอนุญาตให้เสนอขาย warrant และหุ้นรองรับทุกประการ ทั้งนี้ ในการแก้ไขเพิ่มเติมข้อกำหนดตาม warrant ภายหลังการเสนอขาย บริษัทจะดำเนินการให้เป็นไปตามที่กำหนดไว้ในข้อกำหนดสิทธิ และจะไม่ดำเนินการให้ขัดหรือแย้งกับข้อกำหนดตามประกาศคณะกรรมการกำกับตลาดทุนดังกล่าว โดยบริษัทจะแจ้งการแก้ไขเพิ่มเติมนั้นเป็นลายลักษณ์อักษรให้สำนักงานทราบภายใน 15 วันนับแต่วันที่มีการแก้ไขเพิ่มเติม และขอรับรองว่าข้อมูลที่ระบุไว้ในรายการข้างต้นและเอกสารที่แนบมาพร้อม checklist นี้ถูกต้องและตรงต่อความจริงทุกประการ



ลงชื่อ

(นางสุกรานันท์ ตันวิรัช)

ลงชื่อ

(นายวรารุช นาถประดิษฐ์)

ในฐานะกรรมการผู้มีอำนาจลงนามผูกพันบริษัท พร้อมประทับตราบริษัท (ถ้ามี)

**หมายเหตุ**

การเสนอขายหลักทรัพย์ที่ออกใหม่ในราคาต่ำ หมายถึง การเสนอขายหลักทรัพย์ในกรณีใดกรณีหนึ่งดังต่อไปนี้

1. การเสนอขายหุ้นที่ออกใหม่ในราคาต่ำ หมายถึง การเสนอขายหุ้น โดยกำหนดราคาเสนอขายตาม 1 ให้มีส่วนลดจากราคาตลาดเกินกว่า 10%
2. การเสนอขาย warrant ในราคาต่ำ หมายถึง การเสนอขาย warrant และหุ้นรองรับ โดยกำหนดราคาเสนอขายตาม 1 ให้มีส่วนลดจากราคาตลาดเกินกว่า 10%
3. การเสนอขายหุ้นกู้แปลงสภาพ ("CD") ในราคาต่ำ หมายถึง การเสนอขาย CD โดยกำหนดราคาเสนอขายตาม 1 ให้มีส่วนลดจากราคาตลาดเกินกว่า 10%

**1. การคำนวณราคาเสนอขาย**

- 1.1 กรณีเสนอขายหุ้น ให้ใช้ราคาเสนอขายต่อผู้ลงทุน
- 1.2 กรณีเสนอขาย warrant ให้ใช้ราคาเสนอขาย warrant บวกราคาใช้สิทธิที่จะซื้อหุ้น
- 1.3 กรณีเสนอขายหุ้นควบคู่ไปกับใบสำคัญแสดงสิทธิที่จะซื้อหุ้น ให้คำนวณดังนี้

$$\frac{((Ps)(Qs)) + ((Pw)(Qw)) + ((Ep)(Qx))}{Qs + Qx}$$

$$Qs + Qx$$

ทั้งนี้ โดยที่

Ps = ราคาเสนอขายหุ้น

Qs = จำนวนหุ้นที่เสนอขายควบคู่ไปกับ warrant

Pw = ราคาเสนอขาย warrant

Qw = จำนวน warrant ที่เสนอขายควบคู่ไปกับหุ้น

Ep = ราคาใช้สิทธิที่จะซื้อหุ้นตาม warrant

Qx = จำนวนหุ้นที่จะได้รับจากการใช้สิทธิที่จะซื้อหุ้นตาม Qw

- 1.4 กรณีเสนอขาย CD ให้ใช้ราคาเสนอขาย CD หาดด้วยอัตราแปลงสภาพ

**2. การคำนวณราคาตลาด ให้ใช้ราคาหนึ่งราคาใดดังต่อไปนี้**

- 2.1 ราคาตลาดถัวเฉลี่ยถ่วงน้ำหนักของหุ้นย้อนหลังไม่น้อยกว่า 7 วันทำการติดต่อกัน แต่ไม่เกิน 15 วันทำการติดต่อกัน ก่อนวันกำหนดราคาเสนอขาย

(1) ราคาที่นำมาถัวเฉลี่ยสามารถใช้ราคาปิดหรือราคาเฉลี่ยของการซื้อขายหุ้นในแต่ละวันก็ได้



- (2) วันกำหนดราคาเสนอขาย ให้เป็นวันใดวันหนึ่งดังต่อไปนี้
- (ก) วันที่คณะกรรมการมีมติให้เสนอวาระต่อที่ประชุมผู้ถือหุ้นเพื่อขออนุมัติให้บริษัทเสนอขาย warrant และหุ้นรองรับในราคาต่ำ
  - (ข) วันที่ที่ประชุมผู้ถือหุ้นมีมติอนุมัติให้บริษัทเสนอขายหุ้นที่ออกใหม่ในราคาต่ำ
  - (ค) วันแรกที่เสนอขายต่อผู้ลงทุน
  - (ง) วันที่ผู้ลงทุนมีสิทธิซื้อหุ้นตาม warrant

ทั้งนี้ หากไม่ใช่ราคาตลาดถัวเฉลี่ยถ่วงน้ำหนักของหุ้นตลาดตามข้อ 2.1 ให้ระบุความเหมาะสมและเหตุผลของการไม่เลือกใช้ราคาตลาดดังกล่าวให้ชัดเจนด้วย

2.2 ราคาที่กำหนด โดยผ่านการวิเคราะห์เปรียบเทียบกับความต้องการซื้อและความต้องการขายหุ้นที่ออกใหม่ของบริษัท เช่น การสำรวจความต้องการซื้อหลักทรัพย์ (book building) เป็นต้น

2.3 ราคายุติธรรมที่ประเมินโดยที่ปรึกษาทางการเงินที่อยู่ในบัญชีรายชื่อที่สำนักงานให้ความเห็นชอบ ทั้งนี้ ให้เปิดเผยสมมติฐานสำคัญที่ใช้ประกอบการคำนวณราคาตลาดให้เพียงพอและชัดเจนด้วย

เอกสารที่ต้องจัดส่งพร้อมกับ checklist การเสนอขายใบสำคัญแสดงสิทธิที่จะซื้อหุ้น (“warrant”) และหุ้นที่ออกใหม่เพื่อรองรับ warrant (“หุ้นรองรับ”) แบบ RO หรือ PPO แต่ผู้ที่จะใช้สิทธิอาจไม่ใช่ผู้ถือหุ้นของบริษัท

เอกสารที่ต้องจัดส่งพร้อมกับ checklist	มี	ไม่มี	หมายเหตุ
1. รายงานผลการเสนอขาย warrant และหุ้นรองรับ	✓		
2. หนังสือนัดประชุมผู้ถือหุ้นที่ขออนุมัติให้ออกและเสนอขาย warrant และหุ้นรองรับ	✓		
3. มติที่ประชุมผู้ถือหุ้นที่อนุมัติให้ออกและเสนอขาย warrant และหุ้นรองรับ	✓		
4. ข้อกำหนดสิทธิ warrant	✓		
5. รายละเอียดการคำนวณจำนวนหุ้นรองรับ	✓		
6. รายละเอียดการคำนวณ dilution effect	✓		
7. หนังสือสำนักงานแจ้งการผ่อนผันการออก warrant ในสัดส่วนที่มากกว่า 50% (ถ้ามี)		✓	
8. หนังสือสำนักงานแจ้งการผ่อนผันให้บริษัทไม่ต้องดำเนินการปรับสิทธิเมื่อเกิดเหตุการณ์ตามที่ประกาศกำหนด (ถ้ามี)		✓	

#### หมายเหตุ

เอกสารข้างต้นต้องให้กรรมการผู้มีอำนาจลงนามผูกพันบริษัทเป็นผู้ลงนามรับรองความถูกต้องของเอกสารทุกหน้า พร้อมประทับตราบริษัท (ถ้ามี)



## รายละเอียดการคำนวณผลกระทบต่อผู้ถือหุ้น (Dilution Effect)

### 1. การลดลงของสัดส่วนการถือหุ้น (Control Dilution)

ในกรณีที่มีการใช้สิทธิซื้อหุ้นสามัญเพิ่มทุนตามใบสำคัญแสดงสิทธิจนครบทั้งจำนวน แต่ผู้ใช้สิทธิมิใช่ผู้ถือหุ้นของบริษัทฯ จะเกิดผลกระทบต่อสัดส่วนการถือหุ้นของผู้ถือหุ้นโดยผู้ถือหุ้นจะมีสัดส่วนการถือหุ้นลดลงเมื่อเทียบกับสัดส่วนการถือหุ้นก่อนการออกและจัดสรรใบสำคัญแสดงสิทธิ ดังนี้

ผลกระทบต่อสัดส่วนการถือหุ้น (Control Dilution)

$$\begin{aligned} &= \text{จำนวนหุ้นรองรับใบสำคัญแสดงสิทธิที่ออกในครั้งนี้} / (\text{จำนวนหุ้นที่ชำระแล้ว} + \text{จำนวนหุ้นรองรับใบสำคัญแสดงสิทธิที่ออกในครั้งนี้}) \\ &= 2,029,494,045 / (8,117,976,177 + 2,029,494,045) * 100 \\ &= \text{ประมาณร้อยละ 20} \end{aligned}$$

หมายเหตุ ในกรณีที่มีการใช้สิทธิตามใบสำคัญแสดงสิทธิ ROCTEC-W5 เต็มจำนวน บริษัทฯ จะมีหุ้นที่จำหน่ายได้แล้วทั้งหมดเพิ่มขึ้นเป็น 10,147,470,222 หุ้น ซึ่งจะทำให้สัดส่วนการถือหุ้นของผู้ถือหุ้นเดิมลดลงเท่ากับประมาณร้อยละ 20

### 2. ผลกระทบต่อราคาตลาดของหุ้น (Price Dilution)

ภายหลังการออกและจัดสรรใบสำคัญแสดงสิทธิให้แก่ผู้ถือหุ้นตามสัดส่วนการถือหุ้นในครั้งนี้ และผู้ถือใบสำคัญแสดงสิทธิดังกล่าวมีการใช้สิทธิตามใบสำคัญแสดงสิทธิทั้งจำนวน จะไม่เกิดผลกระทบด้านการลดลงของราคาหุ้น (Price Dilution) เนื่องจากราคาใช้สิทธิสูงกว่าราคาตลาดก่อนการจัดสรร โดยราคาตลาดก่อนการจัดสรรเป็นราคาปิดของหุ้นสามัญของบริษัทฯ ที่ทำการซื้อขายในตลาดหลักทรัพย์ย้อนหลัง 7 วันทำการติดต่อกันก่อนวันประชุมคณะกรรมการบริษัท เมื่อวันที่ 18 ตุลาคม 2566 ซึ่งมีมติให้เสนอวาระเรื่องการออกใบสำคัญแสดงสิทธิ ROCTEC-W5 ต่อที่ประชุมวิสามัญผู้ถือหุ้น ครั้งที่ 1/2566 (ราคาระหว่างวันที่ 6 ตุลาคม 2566 ถึง 17 ตุลาคม 2566 ซึ่งเท่ากับ 0.52 บาทต่อหุ้น)

### 3. ผลกระทบต่อส่วนแบ่งของกำไร (Earnings per Share Dilution)

ภายหลังการออกใบสำคัญแสดงสิทธิให้แก่ผู้ถือหุ้นตามสัดส่วนการถือหุ้นในครั้งนี้และผู้ถือใบสำคัญแสดงสิทธิ ROCTEC-W5 มีการใช้สิทธิตามใบสำคัญแสดงสิทธิทั้งจำนวน จะเกิดผลกระทบต่อส่วนแบ่งกำไร ประมาณร้อยละ 20 เมื่อเทียบกับสัดส่วนการถือหุ้นก่อนการออกใบสำคัญแสดงสิทธิ โดยคำนวณจากสูตรดังต่อไปนี้



*(Handwritten signature)*

Earning Per Share Dilution

= (Earning Per Share ก่อนจัดสรร\* - Earning Per Share หลังจัดสรร\*\*) / Earning Per Share ก่อนจัดสรร

= (0.0175 - 0.0140) / 0.0175\*100

= ร้อยละ 20

\*Earning Per Share ก่อนจัดสรร

= กำไรสุทธิ / จำนวนหุ้นที่ชำระแล้ว หรือเท่ากับ 0.0175

\*\*Earning Per Share หลังจัดสรร

= กำไรสุทธิ / (จำนวนหุ้นที่ชำระแล้ว + จำนวนหุ้นรองรับใบสำคัญแสดงสิทธิที่ออกในครั้งนั้น) หรือเท่ากับ 0.0140



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### รายละเอียดการคำนวณจำนวนหุ้นรองรับ

บริษัทฯ มีหุ้นสามัญที่ออกใหม่เพื่อรองรับการใช้สิทธิตามใบสำคัญแสดงสิทธิจำนวนไม่เกิน 2,029,494,045 หุ้น มูลค่าหุ้นที่ตราไว้หุ้นละ 0.10 บาท ซึ่งคิดเป็นสัดส่วนหุ้นรองรับต่อจำนวนหุ้นที่จำหน่ายได้แล้วทั้งหมดของบริษัทฯ เท่ากับประมาณร้อยละ 46.57\*

วิธีการคำนวณสัดส่วนหุ้นรองรับ:

$$\begin{aligned} &= \frac{(\text{จำนวนหุ้นรองรับใบสำคัญแสดงสิทธิ ROCTEC-W5}) + (\text{จำนวนหุ้นคงเหลือเพื่อรองรับใบสำคัญแสดงสิทธิ ROCTEC -W3})}{(\text{จำนวนหุ้นจดทะเบียนชำระแล้ว})} \\ &= \frac{(2,029,494,045 + 1,750,743,750) \times 100}{(8,117,976,177)} \\ &= \frac{3,780,237,795.00 \times 100}{(8,117,976,177)} \\ &= \text{ร้อยละ } 46.57 \end{aligned}$$

