

Daum Communications

- 2003

2003 7 23

IR

2003

		2003		103.4%	618
					179
		320.8%			1
			146		
				EBITDA	
133.8%	259		2 6		
				113%	325
		127.5%	139		
		70.9%	154		
	2				1
(Seasonality)			2		113%
			가		
		Daum			
		2002			
		127.5%	139		
			22.5%	가	5.7
		Daum			
			70		
	1,191				
		9.1%	11.7%	2.6%	가
	가				140
	19				
	70.9%	154			
	166		101%		

103.4% 가 가
 68% 가 1.5 가

29%, EBITDA 42%
 465 2003 6 680
 36 Daum

2001 5 가
 (6 34) 2002 99%
 72%

1. []

(:)

	2003 1H	2002 1H	%
	61,821,283	30,396,603	103.4
	32,450,041	15,234,379	113.0
	13,925,793	6,122,336	127.5
	15,445,449	9,039,887	70.9
가	24,874,027	17,167,492	44.9
	36,947,256	13,229,111	179.3
	19,066,201	8,979,766	112.3
	17,881,056	4,249,344	320.8
	14,566,724	-112,567	
E B I T D A	25,937,075	11,092,776	133.8

- 2003
- 2002

	2003 2Q	2003 1Q	2002 2Q
	33,591,813	28,229,470	17,572,714
	17,697,191	14,752,850	8,914,144
	7,904,144	6,021,650	3,292,181
	7,990,478	7,454,971	5,319,389
가	13,142,771	11,731,256	9,514,963

3

CRM

가 가 Daum

CRM

Daum ARPU

1

(Daum Point) (Daum Cash) (Daum Cash)
7,100 137

20 가 가 2003

(Daum Cash)

가 (Cash Flow)

3. [](2003 6 ,) (: PVs, ,)

546,078	20,833	2,965
32.9%	10.0%	120.7%

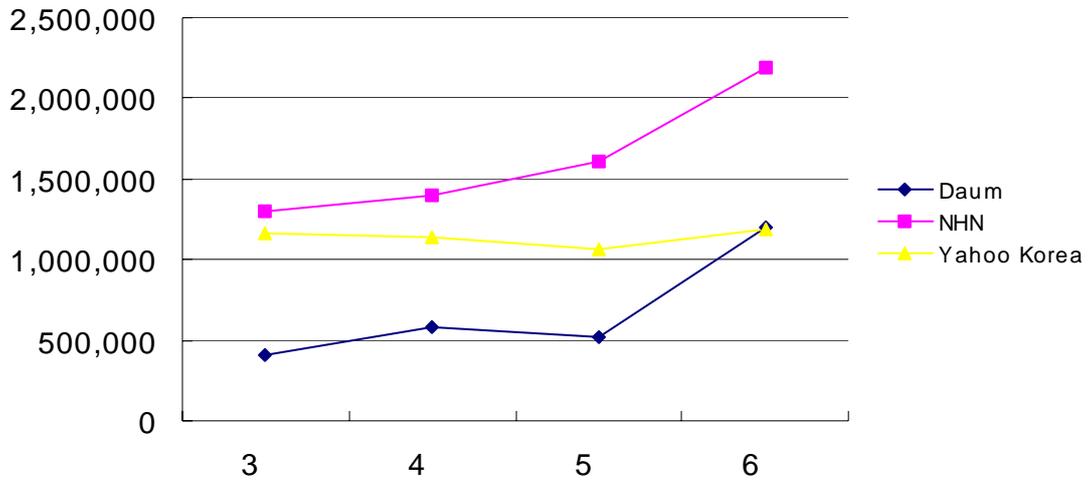
(: 2003 6 ,)

3-1. []

()	(%)	()	()	()
22,841	93.2	20,904,593	14.7	313.4

(: 2003 6 ,)

가 , ,

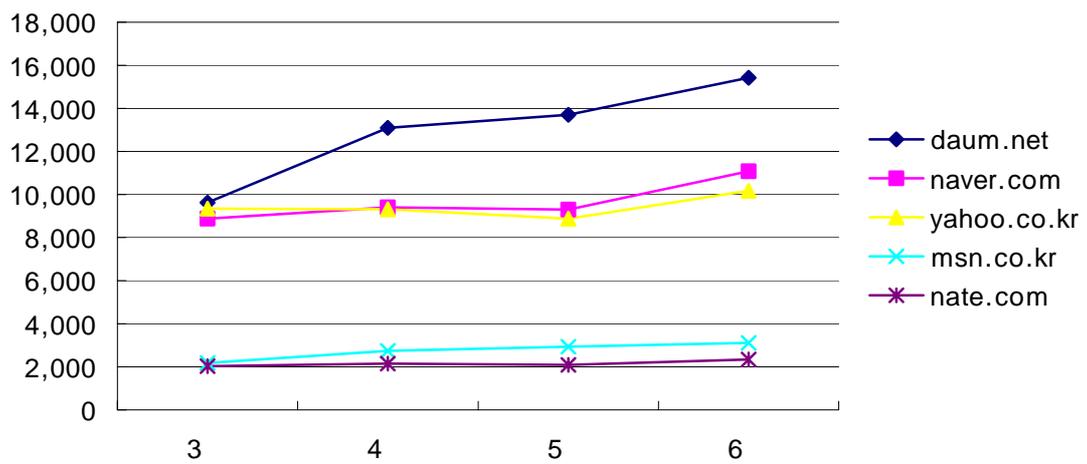


(: 2003.06)

22

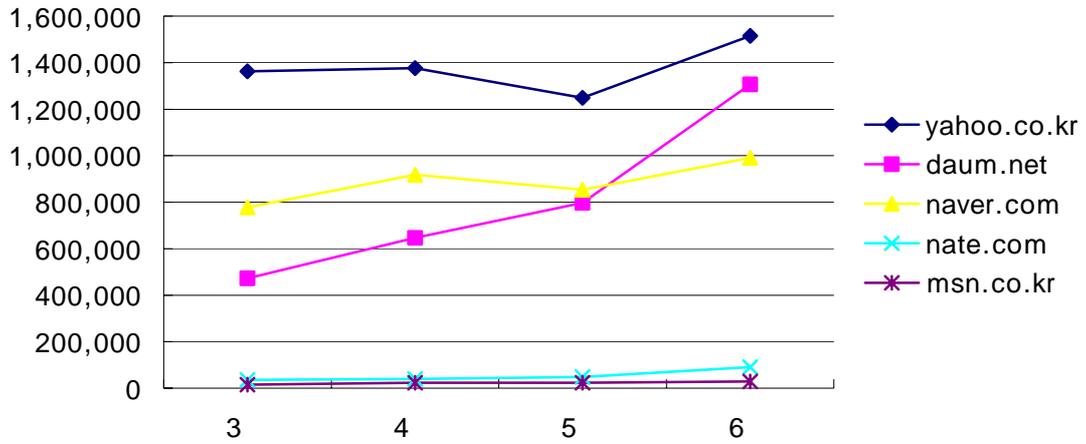
4. []

(:)



5. []

(: PVs)



가

가

가

1

(Seasonality)

2

4

100%

가

가

1

(Branding)

가

가

(E-branding)

/

가

가

11.7% 가 9.1%

(Theme Shop) (Commerce)가 (Digital Camera Shop) (Community)

가 가 CSN (TPL)

“ ”
가 가
CRM

4. []

	2002 2Q	2003 1Q	2003 2Q
	6,864,699	8,386,970	11,532,067
가 ()	41,247	46,167	48,339
	232,123	338,000	370,491
	113,499	124,700	117,014
	250	439	474
	164,369	193,117	210,089
/	9.81%	10.3%	12.9%

2003

가 . 가

, LG ‘ ’ 가

LG가

가

가

9 (Web To Phone)

가

가

가 5

3 가 15 (Pool)

(<http://job.daum.net>)

(CAPEX)

가 2003 54

가 2003 150

가

2003 3

가

(,)

(, ,) (, ,)

가

가

1

