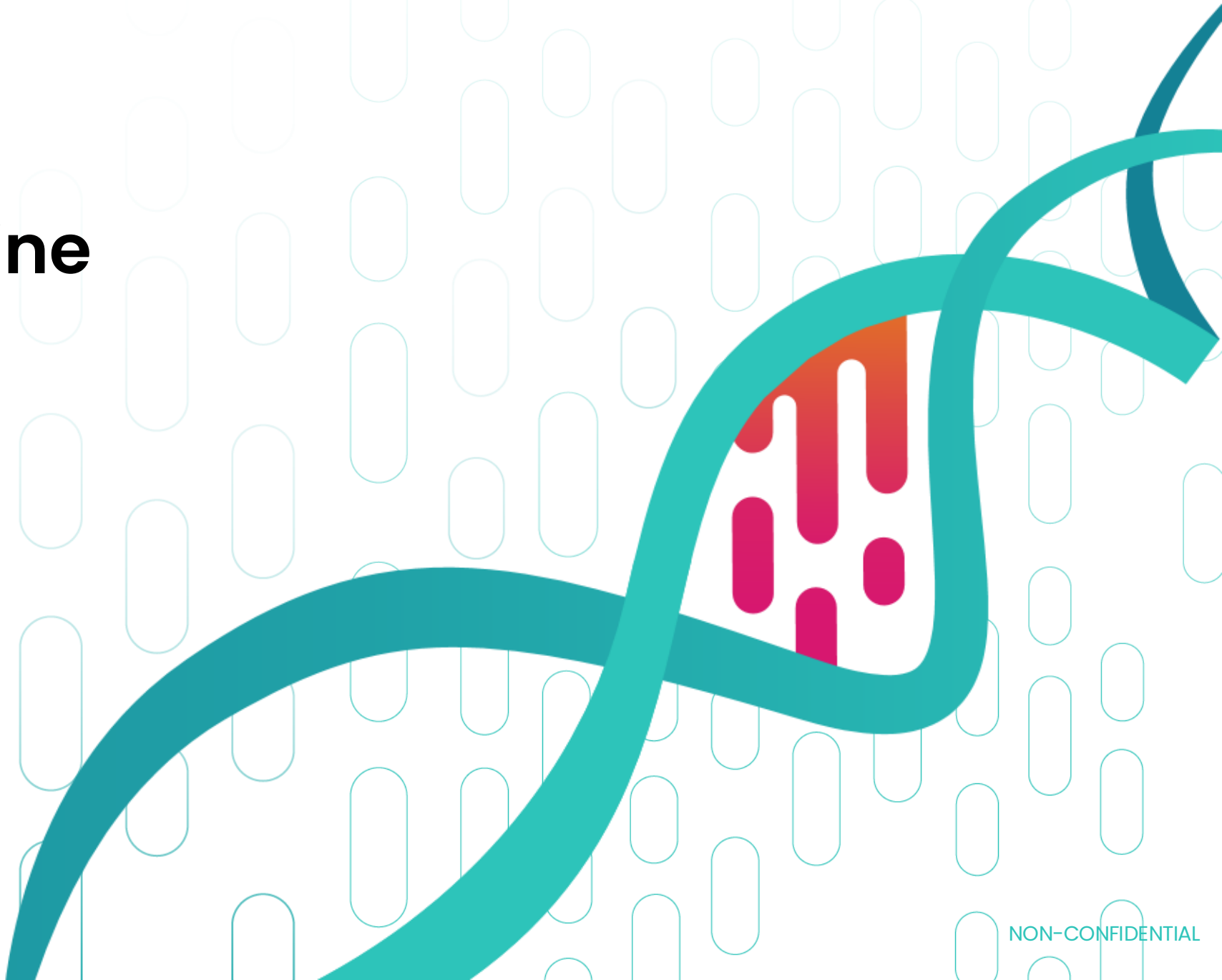
TelesisBio

The Build Engine for AI Labs

DNA synthesis
at the speed of AI



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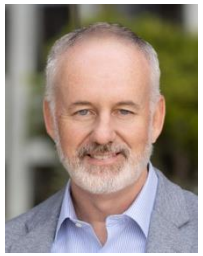
This presentation includes statistical and other industry and market data that we obtained from industry publications and research, surveys and studies conducted by third parties as well as our own estimates of potential market opportunities. Industry publications and third-party research, surveys and studies generally indicate that their information has been obtained from sources believed to be reliable, although they do not guarantee the accuracy or completeness of such information. We believe that these third-party sources and estimates are reliable, but have not independently verified them. Our estimates of the potential market opportunities for our products include several key assumptions based on our industry knowledge, industry publications, third-party research and other surveys, which may be based on a small sample size and may fail to accurately reflect market opportunities. While we believe that our internal assumptions are reasonable, no independent source has verified such assumptions. The industry in which we operate is subject to a high degree of uncertainty and risk due to a variety of important factors that could cause results to differ materially from those expressed in the estimates made by third parties and by us.

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TELESIS BIO: A LEGACY OF GAME-CHANGING DNA INNOVATION

PROTECTED BY
200+
PATENTS

From Gibson Assembly to intelligent, on-premises DNA synthesis



ERIC ESSER
President & CEO
Telesis Bio



DAN GIBSON
CTO, Telesis Bio
Inventor of
Gibson Assembly

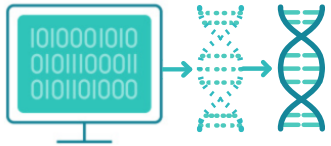
2009

GA GIBSON ASSEMBLY

GIBSON ASSEMBLY

Seamless DNA assembly becomes a foundational method

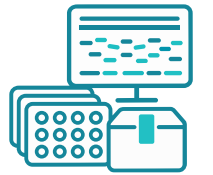
2017



ON-PREMISES DNA SYNTHESIS

On-demand, distributed synthesis of digital sequence driving automated production of biologics

TODAY



GIBSON SOLA

Intelligent DNA synthesis moves into the lab

Today, Telesis Bio is the build engine for the AI laboratory

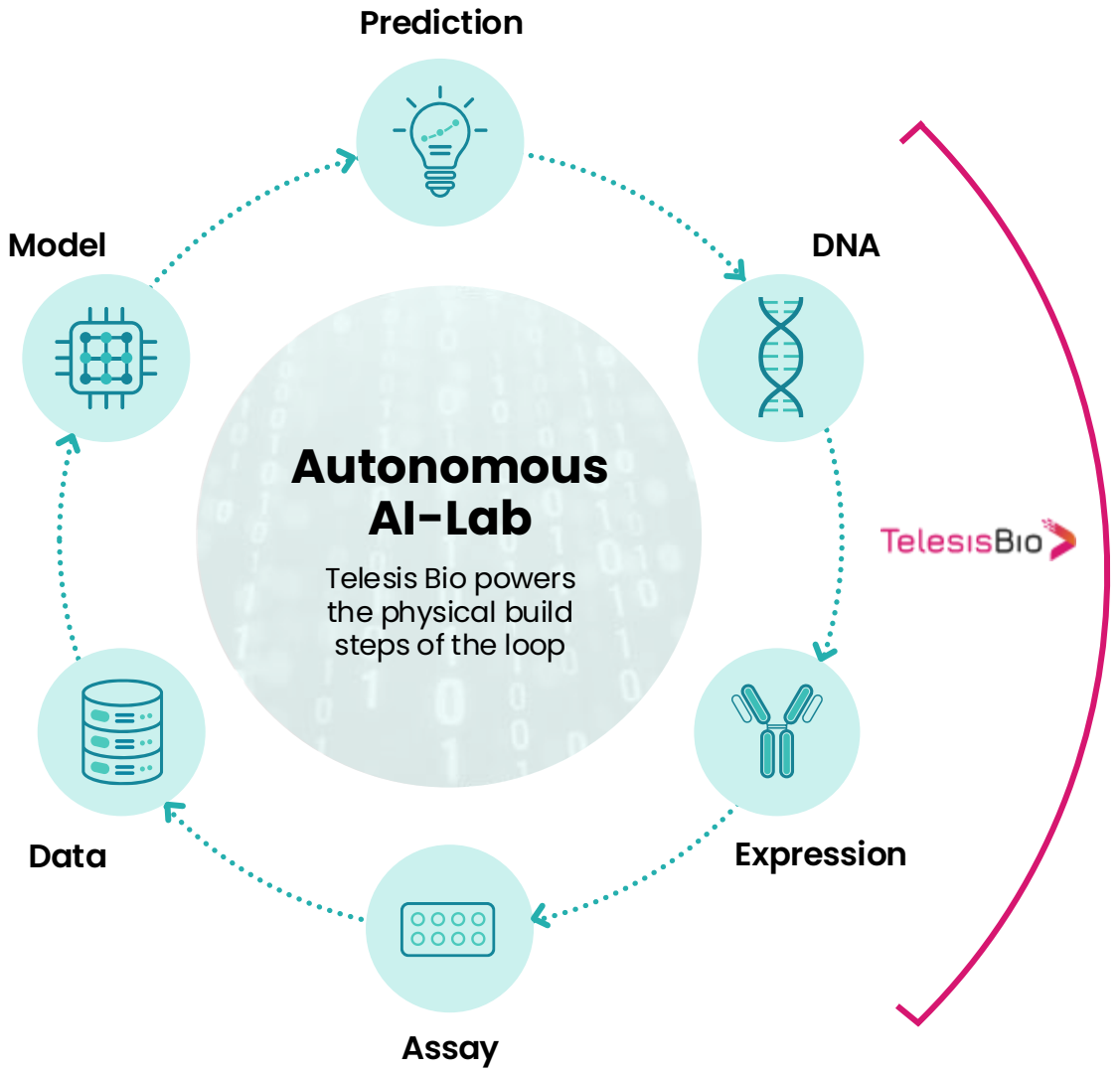
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TELESIS BIO IS AT THE CORE OF THE AI DRUG DISCOVERY REVOLUTION

Generative AI is transforming drug discovery

AI models require millions of data points

DNA has become the currency of the autonomous lab



Telesis Bio's Gibson SOLA® platform
Expression-ready DNA synthesis

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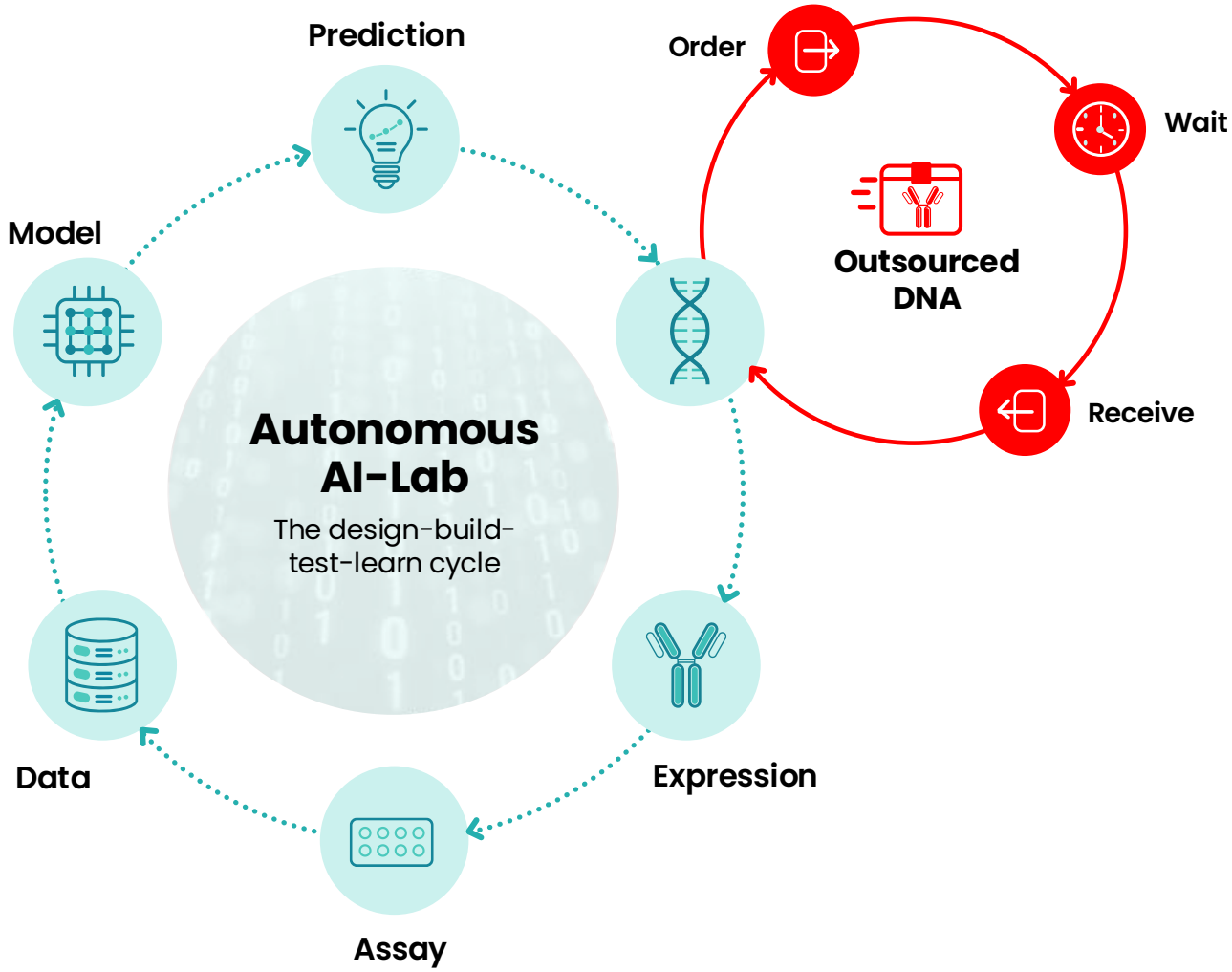
TRADITIONAL OUTSOURCED DNA DOESN'T WORK IN THIS NEW PARADIGM

DNA service providers cannot produce at the scale, speed and cost needed by AI labs

Solving this bottleneck requires in-sourced DNA synthesis capability

Telesis Bio is the only company positioned to capitalize

Outsourcing DNA inserts an external order-and-wait cycle into every round



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TELESIS BIO'S GIBSON SOLA® DELIVERS SPEED, SCALE, & COST FOR THE AI LAB

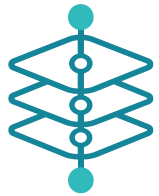


Speed

10x

Faster AI learning rate

Shorten hypothesis-to-answer, accelerate DBTL cycles



Structure

Vertical integration

One controlled system

Turnkey integration from synthesis to data



Cost

-75%

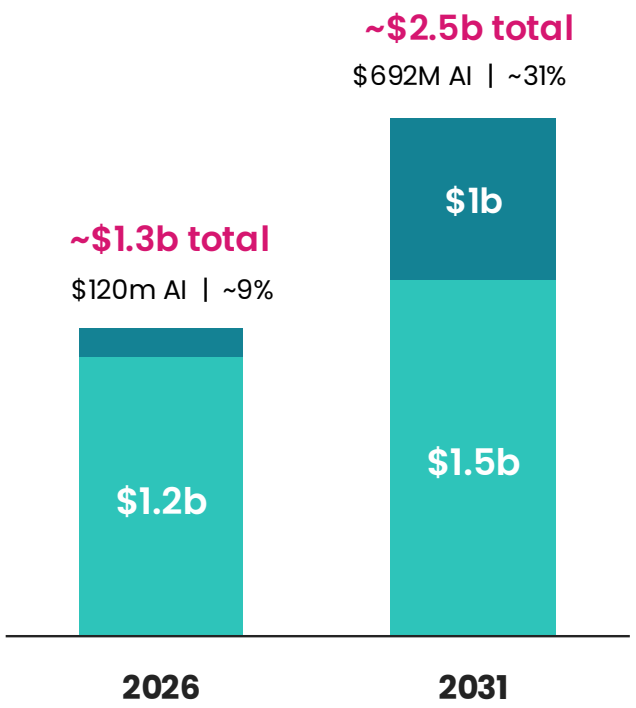
Reduction

Reduced cost per data point to drive throughput scaling

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THE AI ENABLED LAB MARKET IS AT A MASSIVE INFLECTION POINT

Annual synthetic DNA demand ($M)



11%
Overall market CAGR

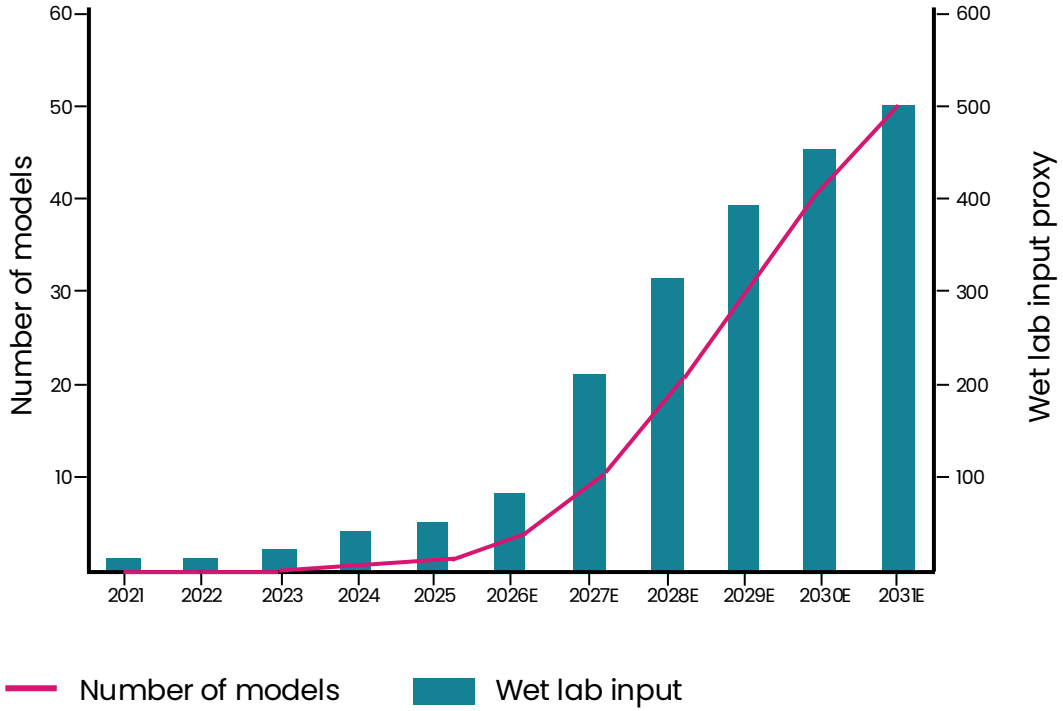
42%
AI-driven demand CAGR

65%
Net market growth from AI

30%
AI share of 2031 demand

Total market extrapolated from Twist's $2.0B 2030 DNA-synthesis estimate using ~11% blended DSPS growth as a directional proxy.

AI foundation model wet lab inputs



Sources: William Blair Equity Research, Company websites

AI LABS DRIVE >$3.5B INCREMENTAL INCREASE IN DNA DEMAND OVER THE NEXT 5 YEARS

MARKET SEGMENTED BY BUYER TYPE AND DEMAND DRIVER

Adjacent — not targeted today

Dry lab model builders

- BioMap
- Boltz
- cradle
- OpenAI
- Tamarind Bio

Marketplaces

- amazon
- Tamarind Bio

Telesis Bio's addressable segment

Pharma model builders

- AstraZeneca
- Lilly
- Genentech
- sanofi
- Bristol Myers Squibb

Cloud labs

- A-ALPHA BIO
- Adaptyv
- GINKGO BIOWORKS
- SUBSTRATE
- VALEN

Wet lab full stack model builders

- absci
- ANTHROP\C
- BigHat Biosciences
- LILA
- Generate:Biomedicines
- xaira

The addressable segment:
Buyers running their own AI-driven wet-lab loop

THE PATH TO >$3.5B IN INCREMENTAL DNA DEMAND

MODEL BUILDERS
focused on "improving the model"

Foundation model initial training

Samples needed per round

100k → 1m+ Ab

The math

10 companies
× 10 rounds
× 200k samples

= 20m Abs to screen

Foundation model generational improvement

Samples needed per round

1,000s → 100k+ Ab

The math

10 companies
× 100 rounds
× 20k samples

= 20m Abs to screen

USERS
focused on "finding a molecule"

Model fine tuning

Samples needed per run

1,000 → 10k+ Ab

The math

1,000 users
× 10 rounds
× 2k samples

= 20m Abs to screen

Iterative design

Samples needed per run

1,00s → 1,000s+ Ab

The math

10,000 users
× 10 rounds
× 100 samples

= 10m Abs to screen

70M Abs to screen x ~$50 per construct ≈ **>$3.5b** incremental DNA demand over 5 years

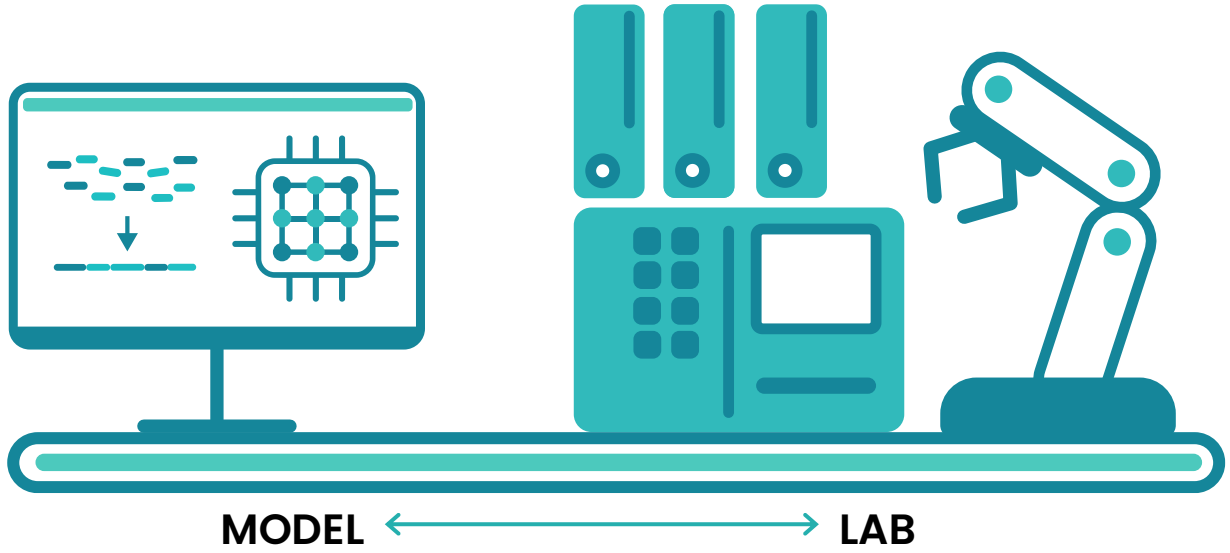
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AI + WET LAB IS THE NEW PARADIGM

AI models are tightly integrated with wet lab capabilities

Lightning-fast DBTL cycles are driving development of AI models

Outsourced DNA is a massive bottleneck at scale



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CUSTOMER EXAMPLE: HYPERSCALE CLOUD LAB

>2,000
genes/day

Throughput service providers can't reach
delivered on-premise with Telesis Bio

How we got there



Cloud lab hyper-scalers require massive DNA quantities with rapid delivery to produce data for AI validation



Entrenched service providers competing in the same market segment are an issue



On-premise design, synthesis, and automation will deliver the scale, speed, and cost this program needed

Massively scaling Ab production faster at lower cost than service providers

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CUSTOMER EXAMPLE: FULL STACK AI NATIVE DRUG DISCOVERY

36 hrs
Sequence-to-DBTL

vs. 15-day TAT with service provider
delivered 10X faster on-premise with Telesis Bio

How we got there



Gut-stable antibody program needed a 36-hour TAT to keep pace with DBTL hypotheses



On-premise design, synthesis, and automation hit 36 hours — 5x faster than Twist



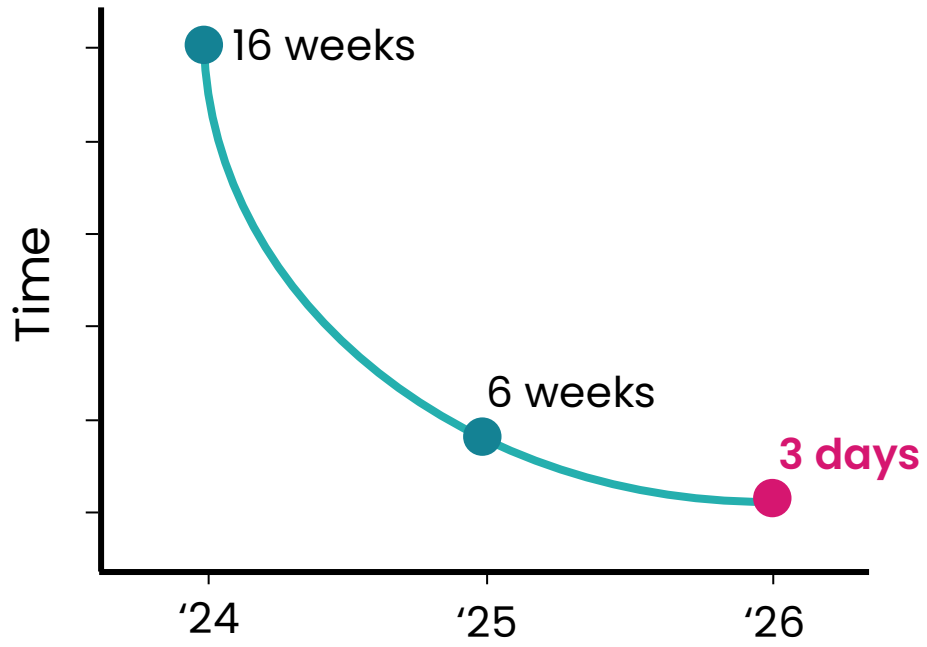
Service provider could only deliver a 15-day TAT

Delivering the fastest hypothesis-to-answer cycle possible

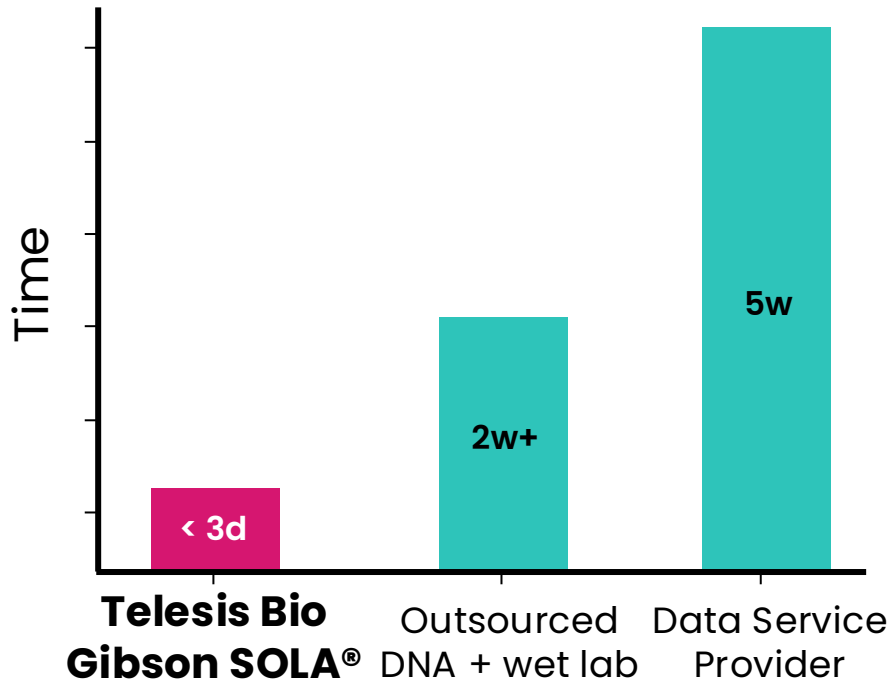
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THE COMPANY WITH THE FASTEST LEARNING RATE WILL WIN THE AI DRUG DISCOVERY RACE

AI Labs need <1 week sequence to data



Only Gibson SOLA can get them there

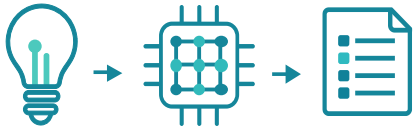


GIBSON SOLA PLATFORM UNLOCKS ONE INTEGRATED WORKFLOW

Design, synthesis, and configured automation as a comprehensive solution

GIBSON SOLA

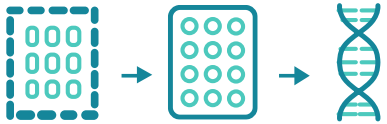
Design



- AI-guided sequence design feeds directly into enzymatic synthesis
- Intelligent synthesis facilitates more re-use and less cost

AI-Enhanced Software Stack

Synthesis



- Gibson SOLA enzymatic ligation drives inherent error-correction
- Produce full-length Linear Expression Cassettes (LECs) — no cloning for simpler, faster workflows

Stock Reagents

Customer Configured Automation



- Compatible with standard lab automation, the workflow operates at customizable throughput
- Deploys on-premise at the speed and scale the AI lab needs to produce data

Validated, Streamlined Automation Protocols

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CONFIGURATIONS OF TELESIS BIO SOLUTIONS

Two packaged offerings for AI-native labs, priced for how they scale.

TELESIS BIO

Gibson SOLA AI-Design SW

Complexity analysis

Intelligent synthesis

Integrated design

Gibson SOLA Reagent Kit

Stock building blocks

Efficient hierarchical assembly

Implementation Expertise

Hardware design

Software integration

License
One time

License &
Milestones
One time

BASE CONFIGURATION

Standard – 100kb/day

- Expression-ready dsDNA
- Pre-designed automation config
- Defined implementation

Annual recurring pull-through

ENTERPRISE CONFIGURATION

Enterprise – 500kb – 8000kb/day

- Customizable endpoint
- Purpose-designed automation config
- Flexible implementation

Annual recurring pull-through

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EVERY COMPETING APPROACH HITS A STRUCTURAL CEILING SOLA IS BUILT TO CLEAR

Hardware makers

DNASCRIPT ELEGEN

Where they fall short

- No path to vertical integration
- No throughput data at required AI-lab scale
- No route to ready-to-express LECs

Why Gibson SOLA wins

SOLA integrates AI-enabled sequence design through expression-ready construct, seamlessly

Reagent makers

Ribbon BIO camena

Where they fall short

- Shipping reagents only
- No integrated automation solution
- Unable to deliver fully on-premise capability

Why Gibson SOLA wins

SOLA ships as pre-qualified, stock reagent kits for a defined hardware configuration — no integration risk, no shipping delay

Service providers

TWIST BIOSCIENCE GenScript Make Research Easy IDT INTEGRATED DNA TECHNOLOGIES

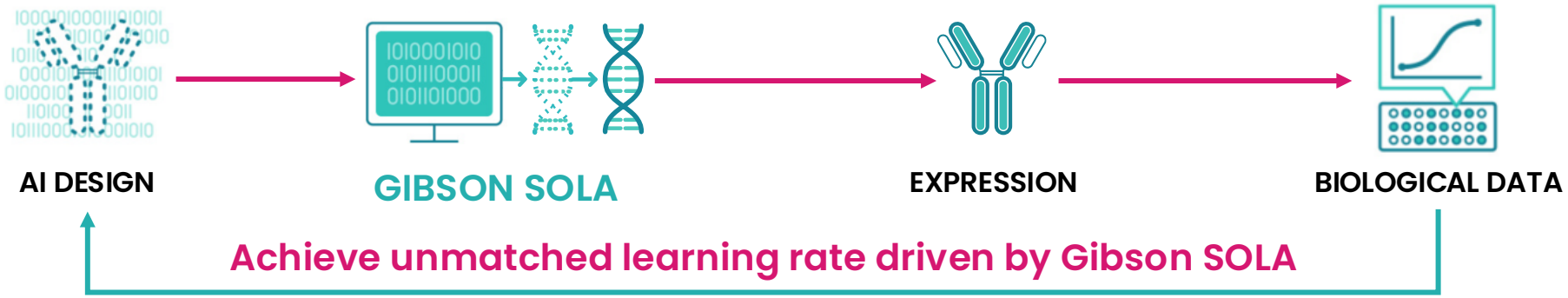
Where they fall short

- No on-premise capability
- Scaling through centralized manufacturing only
- Decades-old technology unable to achieve needed cost/speed

Why Gibson SOLA wins

SOLA deploys on-premise - reducing overall synthesis costs, streamlining workflows, and accelerating time-to-results

TELESIS BIO IS THE BUILD ENGINE FOR AI LABS



INTEGRATED ON-PREM WORKFLOW

AI-enabled design through expression-ready constructs on standard automation

EXPRESSION-READY DNA IN A DAY

Remove the multi-day outsourced order-and-wait cycle

STRUCTURAL ECONOMICS + IP

Industry leading cost per construct on standard automation protected by 200+ patent

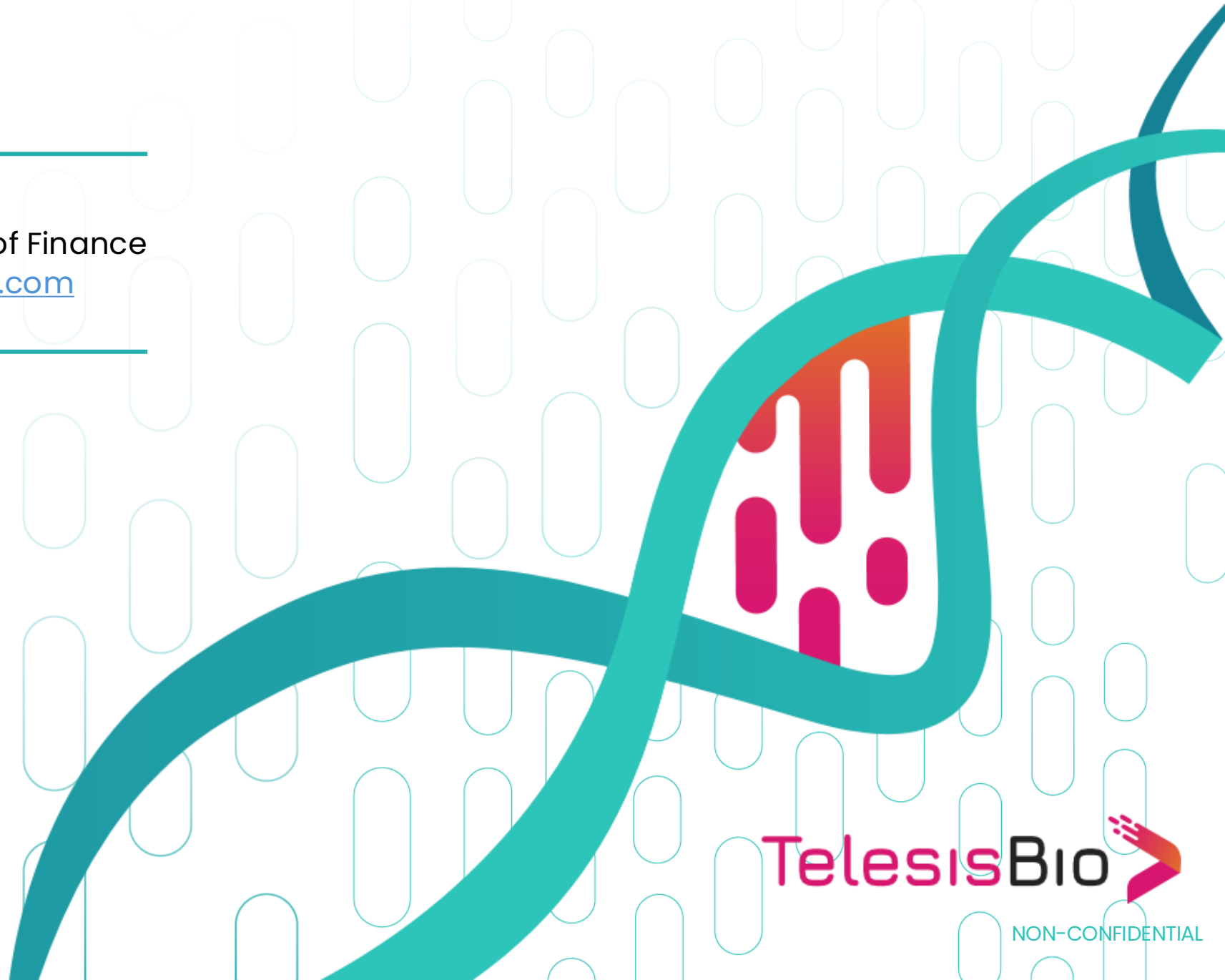
TELESIS BIO'S GIBSON SOLA UNLOCKS DNA AT THE SPEED OF AI

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Thank You

CONTACT

Rocky McDonald, Senior VP of Finance
Rocky.McDonald@telesisbio.com
(619) 518-9270



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