

9 MONTHS ENDED SEPTEMBER 30, 2003



**BARCO**

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## Key figures in IFRS

[ in thousands of euro ]	2003 3 <sup>rd</sup> quarter	2002 3 <sup>rd</sup> quarter	2003 nine months	2002 nine months
Net sales	145,201	145,846	454,268	474,173
Gross profit	61,607	64,744	199,216	207,688
EBITA	10,076	10,451	42,927	43,273
Current result before taxes	10,370	10,842	44,087	44,065
Current result after taxes	7,546	7,359	32,086	32,279
Current result after taxes per share	0.61	0.59	2.59	2.60
Net income	6,684	5,878	27,835	368
Earnings per share	0.54	0.47	2.25	0.03
Diluted earnings per share	0.51	0.45	2.11	0.03
Current cash-flow	21,955	21,912	74,500	77,691
Current cash-flow per share	1.78	1.77	6.01	6.26

## Number of associates

Total	September 30, 2003 4,110	September 30, 2002 4,000
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## Capital & ownership of the company's shares

On September 30, 2003, the capital amounted to euro 53,073,264.76, represented by 12,413,902 shares.  
Ownership of the company's shares was as follows:

		fully diluted
Gimv:	29.60%	27.74%
Public:	70.40%	72.26%

The accounting information taken up in this report has not yet been reviewed by the statutory auditor.  
The auditor's report will be taken up as soon as the review procedures have been fully finalized.

# Barco results 9 months ended September 30, 2003

## Barco meets 3Q03 sales and EBITA targets

Despite continued weak US dollar and economic environment, YoY sales remained unchanged at euro 145.2 million and EBITA reached euro 10.1 million

### Third quarter 2003 financial highlights:

- Sales at euro 145.2 million, in line with management's expectations of euro 140-150 million, and unchanged year-over-year. At constant exchange rates, sales increased 6.2%.
- EBITA down 3.6%, to euro 10.1 million. EBITA margin down to 6.9% from 7.2% in 3Q02. For the nine months, EBITA margin was 9.4%, compared with 9.1% at the end of 3Q02.
- Total negative impact of currency fluctuations on EBITA was euro 5.4 million.
- Net income up to euro 6.7 million, from euro 5.9 million.
- Current earnings per share (operating result before amortization of consolidation goodwill plus interest income/expense, divided by the average number of shares outstanding) of euro 0.61 versus euro 0.59.
- Net earnings per share increased to 0.54, from euro 0.47 the prior year.
- Fully diluted earnings per share up to euro 0.51, from euro 0.45 in 3Q02.

Barco CEO, Martin De Prycker, commented: "Once again we met our quarterly targets for sales and EBITA, although results continued to be impacted by the depreciation of the USD and weak economic environment. Order levels were weak in July and August but picked up in September and have remained strong in October. Excluding the negative impact of currency fluctuations, sales would have increased 6.2% year on year and added euro 5.4 million to EBITA. The total negative impact of currency fluctuations on EBITA year to date thus amounts to euro 14.4 million."

Regarding the outlook for the year, Mr. De Prycker, said: "For 4Q03 we expect orders between euro 175 and 190 million. At constant exchange rates this would mean an increase with at least 18% compared to 4Q02.

We expect sales to range between euro 173 and 183 million, so at constant exchange rates comparable to 4Q02."

"EBITA is expected in the range of euro 23-29 million. This excludes a one-time provision of euro 2.5 million in restructuring charges related to Barco Manufacturing Services, formerly Barco Subcontracting. In order to streamline our operations, we are currently consolidating electronic sub-assembly from four locations in Belgium and

one in the Czech Republic to one in Belgium for small series and one in the Czech Republic for larger series. This will result in cost savings of up to euro 2.5 million per year when the consolidation will be fully effective. These cost savings will be gradually realized during the restructuring process, which will take two to three years. For the full year 2003 we expect EBITA between euro 66 million and euro 72 million, before the provision for restructuring charges," Mr. De Prycker concluded.

### CONSOLIDATED RESULTS FOR THE QUARTER

#### Sales

Sales for the quarter remained relatively unchanged year on year at euro 145.2 million, and in line with management's expectations of euro 140-150 million. Sales increases of 3.3% at BarcoProjection and 14.1% at BarcoView offset declines of 34.2% at BarcoVision and 12.9% at Barco Manufacturing Services.

At constant exchange rates, sales would have increased year on year by 6.2%.

Sales to Europe, Middle East and Africa represented 49.8% of consolidated sales, while 34.2% of sales

### Book-to-bill ratio

	3Q03	2Q03	1Q03	4Q02
Book-to-bill ratio	1.01	1.07	1.05	0.83

were realized in the Americas and 16% in Asia Pacific.

Orders fell by 10% to euro 147.1 million, from euro 163.5 million in 3Q02. This was a result of the 12% depreciation in the US dollar and related currencies against the euro and the weak economic environment. At constant exchange rates, orders would have declined by only 4.1%. Order levels were weak in July and August, but picked up strongly in September, continuing into the fourth quarter.

The book-to-bill ratio was 1.01, compared with 1.12 for 3Q02 and 1.07 for 2Q03. The higher book-to-bill ratio in 3Q02 reflects significant long-term contracts in the Air Traffic Control and Defense markets.

### Gross profit & margin

Gross profit decreased year on year by 4.8% to euro 61.6 million, with gross margin down to 42.4% from 44.4% principally due to an unfavorable product mix. Year-to-date, gross margin remained unchanged at 43.9%.

### Operating results before amortization of consolidation goodwill (EBITA)

EBITA decreased 3.7% to euro 10.1 million, or 6.9% of sales, in-line with management's expectations of euro 7-12 million. This compares to euro 10.5 million, or 7.2% of sales, for 3Q02. Excluding currency fluctuations, EBITA would have increased year on year by 48% to euro 15.5 million.

General & administration expenses as a percentage of sales declined year on year by 20 basis points to 8%. Sales and marketing costs, however, increased to 16.9% of sales from 15.9% in 3Q02, reflecting higher sales coverage in North America (acquisition of Trans-Lux West) and Asia.

Other operating income improved to euro 1.7 million, from an expense of euro 1.3 million, mainly due to currency fluctuations and provisions.

### Income taxes

Income taxes decreased to euro 2.8 million from euro 3.5 million year-on-year as a result of an effective tax rate of 27.2% for 3Q03 compared with 32.1% for 3Q02.

**Current earnings per share** (operating result before amortization of consolidation goodwill plus interest income/expense divided by the weighted average number of shares outstanding) for the

quarter increased to 0.61 from euro 0.59 for 3Q02.

### Net income

Net income for the quarter improved to euro 6.7 million, or a net margin of 4.6%, from euro 5.9 million for 3Q02. Net income reflects an extraordinary gain of euro 0.7 million from the sale of Machine Vision in July 2003 and a decline in income taxes of euro 0.7 million as a result of a lower effective tax rate for the period.

Net earnings per ordinary share (EPS) improved year on year to euro 0.54, from euro 0.47 in 3Q02. Fully diluted net earnings per share were euro 0.51, compared with euro 0.45.

### Capital expenditures (CAPEX)

Capex for the quarter was euro 4.6 million, including euro 2.4 million for the construction and expansion of BarcoView's plants in Belgium and Georgia, US. For 4Q03, management expects capex of approximately euro 10 million, also including the construction and expansion of these plants.

## CONSOLIDATED RESULTS FOR THE NINE MONTHS

### Sales

Sales declined 4.2% to euro 454.3 million. This was primarily the result of declines of 13% at BarcoProjection and 10.6% at BarcoVision, which more than offset the 24.5% increase at BarcoView.

Excluding currency fluctuations, sales would have increased 4.1%.

### Gross profit & margin

Gross profit declined 4.1% year on year to euro 199.2 million, from euro 207.7 million. Gross margin remained unchanged at 43.9% during the same period.

### Operating results before amortization of consolidation goodwill (EBITA)

EBITA declined by 0.8% to euro 42.9 million, from euro 43.3 million, reflecting the 3.7% decline in EBITA recorded for 3Q03. EBITA margin, however, improved to 9.4% from 9.1% in the first nine months of 2002.

General & administration expenses, as a percentage of sales, remained unchanged at 7.8%. Sales & marketing expenses, however, increased year on year to 16.4% from 15.2%. Research & development costs increased to 11.4% of sales from 11.1% in the year-ago period.

Other operating income, net, improved to a gain of euro 5.4 million from an expense of euro 2.3 million principally due to currency fluctuations and provisions.

### Income taxes

Income taxes increased to euro 12 million from euro 11.8 million year on year.

**Current earnings per share** (operating result before amortization of consolidation goodwill plus interest income/expense divided by the weighted average number of shares outstanding) were at euro 2.59 for the nine months, compared with euro 2.60 in the same period of 2002.

### Net income

Net income improved to euro 27.8 million, from euro 0.3 million in the same period of 2002. Net

earnings per ordinary share (EPS) increased to euro 2.25, from euro 0.03. Fully diluted net earnings per share were euro 2.12, compared with euro 0.03 in the year-ago period.

## OUTLOOK FOR 3Q03 AND REMAINDER OF FISCAL 2003

*The following statements are forward looking and actual results may differ materially*

For the fourth quarter of 2003, Barco expects to achieve sales of between euro 173-183 million. This means at constant exchange rates, sales are at a comparable level with 4Q02.

Orders for 4Q03 are expected to range between euro 175 million and euro 190 million, so at constant exchange rates, at least 18% higher than orders of 4Q02.

Assuming the value of the US dollar does not further depreciate relative to the euro, the company expects to achieve an operating result before amortization of consolidation goodwill in the range of euro 23-29 million. This excludes the provision for the one-time restructuring charges at Barco Manufacturing Services of euro 2.5 million.

## DIVISIONAL RESULTS FOR THE QUARTER

### BarcoProjection

Sales increased by 3.3% year-on-year, with higher sales to the US and European Media markets. Control Rooms sales have been picking-up in Asia, while the Simulation market remains weak, particularly in Civil Aviation.

The book-to-bill ratio was 1.14 driven by strong orders, especially in Control Rooms for broadcast solutions in the U.S. and Japan as well as in Traffic & Surveillance worldwide. Barco's market leadership in Events was further confirmed by increased sales both in Europe and the U.S. The Presentation market also had a good order level.

Gross profit margin decreased to 42% from 45% in the previous quarter, due to an unfavorable product mix. This resulted in an EBITA margin of 5.4%, compared with 10.0% in 3Q02. Management expects that the transition of the manufacturing of large volume LED walls from Belgium to China-based Barco-Leyard by 1Q04 will allow the company to reduce costs as well as sensitivity to fluctuations in the USD exchange rate. A number of new products were introduced during the quarter, including a high resolution LED

wall (3 mm pitch) for media applications, a world-record light output projector for the events market, and MiPIX, a modular intelligent LED pixel block, which measures only 4cm by 4cm and can be used to create intelligent effects on large-scale backdrops of any form, shape or size. During the quarter Barco also introduced prepackaged solutions at its Simulation business unit.

### BarcoView

Sales at BarcoView rose 14.1% year-on-year. On a sequential basis, sales to the Medical Imaging market improved, both in Europe and the U.S. Sales at Air Traffic Control and Defense & Security were strong compared to 3Q02, but somewhat lower versus 2Q03.

Although orders in Air Traffic Control and Defense & Security remain low, management expects increased commercial activity to result in higher order levels for 4Q03. In the Medical market, although order levels remain high, customers are not placing advance orders, reducing the book-to-bill ratio.

Gross profit margin increased to 45% from 44% on a sequential basis. EBITA margin improved to 10.5% from 4.2% in 3Q02.

During the quarter Barco introduced the Coronis 3MP Duralight, a new backlight technology which extends the lifetime of medical LCD displays.

### BarcoVision

Sales at BarcoVision declined year on year by 34.2%. Results for 3Q03 exclude sales and orders of Machine Vision, the Company's former food sorting business unit as it was divested and deconsolidated as of July 1. Results for 2Q03, however, include sales of euro 6.0 million and EBITA of euro 1.1 million for Machine Vision. Sales volumes to the textile market were weak reflecting the down part of the cycle, which is expected to continue well into 2004. However, at ITMA 2003, the cutting edge show for the global textile machinery industry, interest in new Barco products such as the on-loom inspection system Cyclops, was very high.

EBITA margin, however, increased at 12.4%, compared with 9.7% for 3Q02, due to a better product mix.

The divestiture of Machine Vision generated a non-operating result of euro 0.7 million.

## PARTICIPATIONS

As previously announced, Barco is currently talking to interested parties with the intention of deconsolidating dotrix nv. This is the only subsidiary in the Graphics market in which Barco still has majority participation.

In addition to the participation in dotrix nv, Barco still has a total exposure of euro 17 million in the Graphics market. This market is still negatively impacted by the unfavorable economic environment.

# Income statement in IFRS

	2003	2002	2003	2002
[ in thousands of euro ]	3 <sup>rd</sup> quarter	3 <sup>rd</sup> quarter	nine months	nine months
Net sales	145,201	145,846	454,268	474,173
Cost of goods sold	-83,593	-81,102	-255,052	-266,484
<b>Gross profit</b>	<b>61,607</b>	<b>64,744</b>	<b>199,216</b>	<b>207,688</b>
Research and development expenses	-17,103	-17,901	-51,810	-52,797
Sales and marketing	-24,525	-23,153	-74,464	-72,269
General and administration expenses	-11,649	-11,913	-35,372	-37,027
Other operating income (expense) - net	1,745	-1,326	5,357	-2,322
<b>EBITA</b>	<b>10,076</b>	<b>10,451</b>	<b>42,927</b>	<b>43,273</b>
Goodwill amortization	-1,463	-1,482	-4,794	-3,893
<b>Operating result</b>	<b>8,613</b>	<b>8,969</b>	<b>38,133</b>	<b>39,380</b>
Interest income (expense) - net	294	392	1,160	792
Other non-operating income (expense) - net	656		656	-28,092
<b>Non-operating result</b>	<b>950</b>	<b>392</b>	<b>1,817</b>	<b>-27,301</b>
<b>Income taxes</b>	<b>-2,824</b>	<b>-3,483</b>	<b>-12,001</b>	<b>-11,785</b>
<b>Net income of consolidated companies</b>	<b>6,740</b>	<b>5,878</b>	<b>27,949</b>	<b>294</b>
Minority interest	56		113	-74
<b>Net income</b>	<b>6,684</b>	<b>5,878</b>	<b>27,835</b>	<b>368</b>
Earnings per share	0.54	0.47	2.25	0.03
Diluted earnings per share	0.51	0.45	2.11	0.03

# Balance sheet in IFRS

Sept 30, 2003 Dec 31, 2002

[ in thousands of euro ]

## Assets

Goodwill	33,821	30,538
Capitalized development cost	53,818	54,921
Other intangible fixed assets	1,760	1,923
Land and buildings	60,299	58,150
Assets under construction and advance payments	3,621	456
Other tangible fixed assets	37,040	42,517
Investments	10,236	5,050
Deferred tax assets	7,285	8,633
Other non-current assets	12,387	14,609
<b>Non-current assets</b>	<b>220,268</b>	<b>216,797</b>
Inventory	115,620	117,995
Trade debtors (accounts receivable)	138,729	158,497
Other amounts receivable	16,255	31,846
Deposits and cash at bank and in hand	119,971	122,529
Prepaid expenses and accrued income	8,161	4,680
<b>Current assets</b>	<b>398,736</b>	<b>435,547</b>
<b>Total Assets</b>	<b>619,004</b>	<b>652,344</b>

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## Liabilities

<b>Equity</b>	<b>373,306</b>	<b>382,759</b>
<b>Minority interest</b>	<b>1,258</b>	<b>10</b>
Long term debts interest-bearing liabilities	17,960	13,275
Deferred tax liabilities	8,522	9,125
Other long term liabilities	2,849	3,223
<b>Non-current liabilities</b>	<b>29,332</b>	<b>25,623</b>
Current portion of long term debts	1,095	1,472
Short term debts	9,477	19,656
Trade payables	56,469	60,388
Advances received on contracts in progress	25,031	26,125
Tax payables	18,619	27,020
Liabilities personnel commitments	39,660	39,932
Other current liabilities	8,417	6,583
Accrued charges and deferred income	19,319	22,708
Provisions for liabilities and charges	37,021	40,069
<b>Current liabilities</b>	<b>215,108</b>	<b>243,952</b>
<b>Total liabilities</b>	<b>619,004</b>	<b>652,344</b>

## Comments

IFRS 34 was applied to the balance sheet and income statement. 2003 is the first year in which the publication of results is in conformity with these rules. The IFRS accounting principles are followed, and they will also be used for the annual statement of accounts for the financial year 2003. IFRS has also been applied to the figures for the financial year 2002, so that they can be used as a relevant basis for comparison. In a separate annex, you will find the valuation rules and explanatory notes making the comparison with the annual accounts that were published in conformity with Belgian GAAP.

The acquisition of the full-color LED activity of the Chinese Leyard Electronics Technology Co Ltd took place in the beginning of September 2003. This

company's balance sheet was included in the Barco consolidation on September 1, 2003. Results have been incorporated into the income statement for the month of September.

In October 2003, Barco started the restructuring of Barco Manufacturing Services, formerly Barco Subcontracting. A one time provision of euro 2.5 million will be included in the 4th quarter, 2003.

In July 2003, Barco sold the Machine Vision Business Unit, a part of the BarcoVision division, to BEST n.v. The Machine Vision Business Unit was excluded from the Barco consolidation from the first of July onwards. This transaction has a positive effect of euro 0.7 million on the non-operating result of the third quarter.

The total exposure of Barco in the graphics sector (with the exception, however, of dotrix) is euro 17 million. Barco does not have a recent business plan at its disposal, on the basis of which it can assess the value of its participation and loans. Recent results however, and the unfavorable climate the graphics market is still in, illustrate the risks that will remain as long as the economy in general and the graphics market in particular are not improving.

When looking at the quarterly results of Barco, it should be noted that the first and third quarter of the year normally generate lower sales than the second and fourth quarter.

## Changes in equity

[ in thousands of euro ]	2003 3 <sup>rd</sup> quarter	2002 3 <sup>rd</sup> quarter	[ in thousands of euro ]	2003 nine months	2002 nine months
Equity June 30	372,463	364,998	Equity December 31	382,759	404,473
Net income	6,684	5,878	Net income	27,835	368
Dividend			Dividend	-23,831	-23,335
Translation adjustment	-1,466	334	Translation adjustment	-8,750	-10,298
Derivatives	221	-50	Derivatives	182	-49
Capital increase			Capital increase	89	
Acquisition of own shares	-4,596		Acquisition of own shares	-4,978	
Equity September 30	373,306	371,159	Equity September 30	373,306	371,159

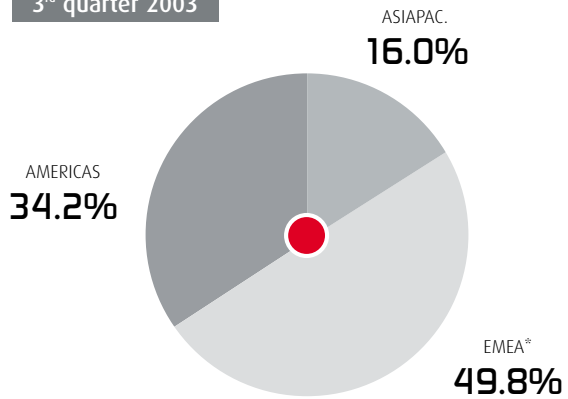
# Cash-flow statement in IFRS

[ in thousands of euro ]	2003	2002	2003	2002
	3 <sup>rd</sup> quarter	3 <sup>rd</sup> quarter	nine months	nine months
<b>Cash-flow from operating activities</b>				
EBITA	10,076	10,451	42,927	43,273
Amortization capitalized development cost	8,676	8,808	26,416	26,281
Depreciation of tangible and intangible fixed assets	4,581	5,314	15,251	16,791
<b>Gross operating cash-flow</b>	<b>23,333</b>	<b>24,573</b>	<b>84,595</b>	<b>86,344</b>
Decrease in trade receivables	7,015	17,573	17,661	33,664
Decrease in inventory	10,171	-1,429	-1,703	13,345
Increase in trade payables	-7,394	-1,750	-2,528	5,392
Other changes in net working capital	2,327	-1,807	-4,477	1,892
<b>Change in net working capital</b>	<b>12,119</b>	<b>12,587</b>	<b>8,954</b>	<b>54,293</b>
<b>Net operating cash-flow</b>	<b>35,452</b>	<b>37,160</b>	<b>93,549</b>	<b>140,637</b>
Interest income/expense	294	392	1,160	792
Income taxes paid	-1,672	-3,052	-11,255	-9,445
<b>Cash-flow from operating activities</b>	<b>34,073</b>	<b>34,499</b>	<b>83,454</b>	<b>131,984</b>
<b>Cash-flow from investing activities</b>				
Expenditure on product development	-7,712	-7,924	-27,534	-26,684
Purchases of tangible and intangible fixed assets	-4,629	-2,713	-9,428	-13,151
Acquisition of Group companies, net of acquired cash	-8,014	-10,672	-11,462	-10,672
Disposal of Group companies, net of disposed cash	6,148		6,148	4,756
Other investing activities		2	9	952
<b>Cash-flow from investing activities</b>	<b>-14,207</b>	<b>-21,307</b>	<b>-42,267</b>	<b>-44,799</b>
<b>Cash-flow from financing activities</b>				
Dividends paid			-23,831	-23,335
Share issue			89	
Acquisition of own shares	-4,596		-4,978	
Proceeds from (+), payments of (-) long term liabilities	2,970	70	871	-2,185
Proceeds from (+), payments of (-) short term liabilities	336	-23,840	-10,556	-59,841
Foreign exchange adjustment	-517	334	-5,341	-6,139
<b>Cash-flow from financing activities</b>	<b>-1,807</b>	<b>-23,436</b>	<b>-43,746</b>	<b>-91,500</b>
<b>Net decrease/increase in cash and cash equivalents</b>	<b>18,060</b>	<b>-10,244</b>	<b>-2,559</b>	<b>-4,316</b>
<b>Cash and cash equivalents at beginning of period</b>	<b>101,911</b>	<b>112,639</b>	<b>122,529</b>	<b>106,711</b>
<b>Cash and cash equivalents at end of period</b>	<b>119,971</b>	<b>102,395</b>	<b>119,971</b>	<b>102,395</b>

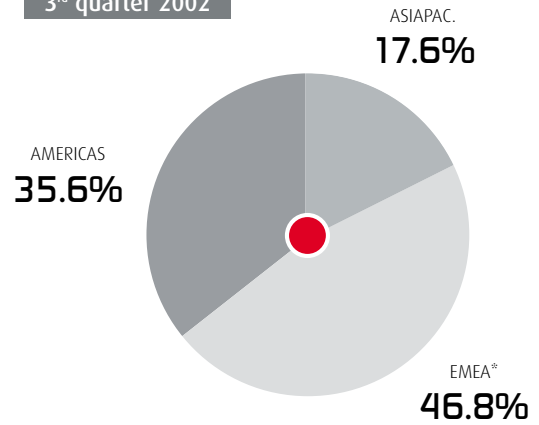
# Geographical breakdown of sales



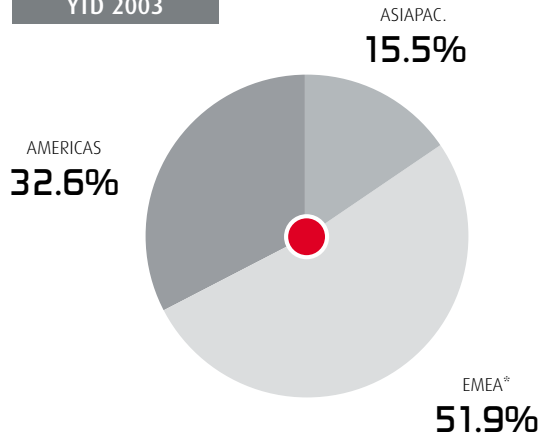
3<sup>rd</sup> quarter 2003



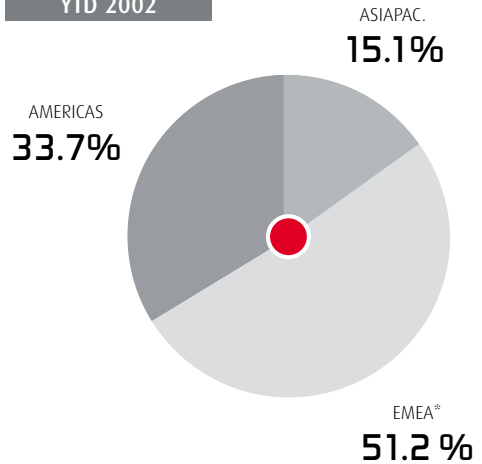
3<sup>rd</sup> quarter 2002



YTD 2003



YTD 2002



\* Europe, Middle East, Africa

## Results per division

Sales in '000 euro and current EBITA in IFRS

Third quarter	2003 3 <sup>rd</sup> quarter			2002 3 <sup>rd</sup> quarter		
	Sales	EBITA	%EBITA	Sales	EBITA	%EBITA
BarcoProjection	74,658	4,044	5.4%	72,259	7,261	10.0%
BarcoView	46,848	4,904	10.5%	41,067	1,728	4.2%
BarcoVision	15,702	1,941	12.4%	23,850	2,312	9.7%
dotrix	1,608	-1,090	-67.8%	1,429	-1,147	-80.3%
Barco Manufacturing Services	14,537	278	1.9%	16,693	296	1.8%
Eliminations	-8,152			-9,451		
<b>Total</b>	<b>145,201</b>	<b>10,076</b>	<b>6.9%</b>	<b>145,846</b>	<b>10,451</b>	<b>7.2%</b>

September Year to Date	2003 Sept YTD			2002 Sept YTD		
	Sales	EBITA	%EBITA	Sales	EBITA	%EBITA
BarcoProjection	213,789	12,032	5.6%	245,707	27,410	11.2%
BarcoView	152,763	21,869	14.3%	122,674	8,453	6.9%
BarcoVision	61,937	10,347	16.7%	69,306	7,622	11.0%
dotrix	3,291	-4,134	-125.6%	5,299	-2,966	-56.0%
Barco Manufacturing Services	50,940	2,812	5.5%	60,874	2,755	4.5%
Eliminations	-28,451			-29,686		
<b>Total</b>	<b>454,268</b>	<b>42,927</b>	<b>9.4%</b>	<b>474,173</b>	<b>43,273</b>	<b>9.1%</b>

### **Registered office and Group management**

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### **Stock Exchange**

Euronext Brussels  
Euronext: BAR  
Reuters: BARbt.BR  
Bloomberg: BAR BB

### **Financial information**

More information can be obtained at the  
Investor Relations Department of the group  
management

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or e-mail: [sigrid.desanghere@barco.com](mailto:sigrid.desanghere@barco.com)

### **Report**

This report "9 months ended September 30,  
2003" is also available in Dutch and can be  
consulted on the website [www.barco.com](http://www.barco.com)