

Asia Tech

Navigating The Noise

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Taiwan: 2nd to 4th December

Hon Hai (2317 TT) : \$92bn

EMS: AAPL/Consumer Elec / Server / Auto

Delta Elec (2308 TT) : \$33bn

Power Supply

ASE Tech (3711 TT) : \$22bn

OSAT

Wistron (3231 TT) : \$10bn

NB / Server ODM

Accton (2345 TT) : \$10bn

Comm Networking: Switch / NIC

Unimicron (3037 TT) : \$8bn

IC Substrate & PCB's: ABF / BT / HDI

Aspeed (5274 TT) : \$5bn

Fabless IC: Server Management

Chroma (2360 TT) : \$6bn

ATE: Semi / EV / Power Elec

King Yuan (2449 TT) : \$5bn

IC Test: AP / GPU

WT Micro (3036 TT) : \$4bn

IC Distribution

Grand Process (3131 TT) : \$2bn

CoWoS Packaging Equip. / Interposers

Korea: 5th - 6th December

Samsung (005930 KS) : \$255bn

DRAM / NAND / SP / TV

SK Hynix (000660 KS) : \$103bn

DRAM / NAND

SKC (011790 KS) : \$4bn

EV Battery / Glass Substrates / Chemicals

Lg Innotek Co Ltd (011070 K) : \$3bn

Camera Module

Isupetasys (007660 KS) : \$2bn

PCB

Wonik (240810 KS) : \$1bn

SPE: ALD / CVD / Etch

ISC (095340 KS) : \$1bn

IC Test Sockets for Memory / Logic

KoMiCo (183300 KS) : \$300m

SPE: Cleaning for ALD / CVD / Etch

Japan 9th to 12th December

Sony (6758 JT) : \$119bn

Consumer Elec / Image Sensors / Gaming

Shin-Etsu (4063 JT) : \$74bn

Silicon wafers

Tokyo Electron (8035 JT) : \$67bn

Deposition / Etch

Advantest (6857 JT) : \$47bn

ATE

Disco (6146 JP) : \$30bn

Wafer cutting / grinding / polishing

Ajinomoto (2802 JP) : \$21bn

Films for advanced substrates

Lasertec (6920 JT) : \$11bn

EUV mask inspection

Shinko Electric (6967 JP) : \$5bn

IC Substrates

Ibiden Co Ltd (4062 JP) : \$4bn

IC Substrates

SUMCO (3436 JT) : \$3bn

Silicon wafers

Ulvac (6728 JP) : \$2bn

Vacuum & thin film equip. / semi & display

Rorze (6323 JP) : \$2bn

Wafer handling robots