

## 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

**Lenovo (992 HK) : \$15bn**

Hopper & Blackwell Servers

**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

**Isupetasy (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

**Tokyo Electron (8035 JT) : \$67bn**

Deposition / Etch

**Advantest (6857 JT) : \$47bn**

ATE

**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

**Nikon (7731 JT) : \$4bn**

Lithography

**SUMCO (3436 JT) : \$3bn**

Silicon wafers

**Kokusai Elec (6525 JP) : \$3bn**

SPE / Deposition / 60% Memory / 40% Logic

**Ulvac (6728 JP) : \$2bn**

Vacuum & thin film equip. / semi & display

**Rorze (6323 JP) : \$2bn**

Wafer handling robots

**Ushio (6925 JT) : \$1bn**

Light source for SPE