



華泰電子股份有限公司

Orient Semiconductor Electronics ,Ltd.

(股票代號：2329)

2026年法人說明會
INVESTOR CONFERENCE

02 OCT ,2026

Summary

Part 1 Company Profile

Part 2 Manufacture Service & Product

Part 3 2026 Q2 Financial Performance

Part 4 Outlook for 2026 Q4 Onward

Part 5 Q&A



Company Profile



誠正信實
INTEGRITY

主動創新
INNOVATION

積極用心
PROACTIVENESS

異體同心
EMPATHY

3/25

Company History



- Capital : US\$ 208M(NTD6.59B)
- **2026**
55th Anniversary Celebration
- **2015 & 2020**
Strategic Partnership Announcement
- **2014**
1st 16D microSD in the world
- **2005**
Biz Transformation into Memory Market
- **Apr, 1994**
IPO in Taiwan Stock Exchange (TSE: 2329)
- **1971 Established**
Founder : Dr. Eugene C. Y. Duh
Headquarters : Kaohsiung, Taiwan

Operating Locations



Production
Building

6+1
NTIP



Employee

5,800 人



Headquarters
(59,587 M²)



LIC
(35,738 M²)



Facility 1
(11,251 M²)



*Launch Operation
by the 2nd Quarter
of 2027



Facility 3
(15,691 M²)

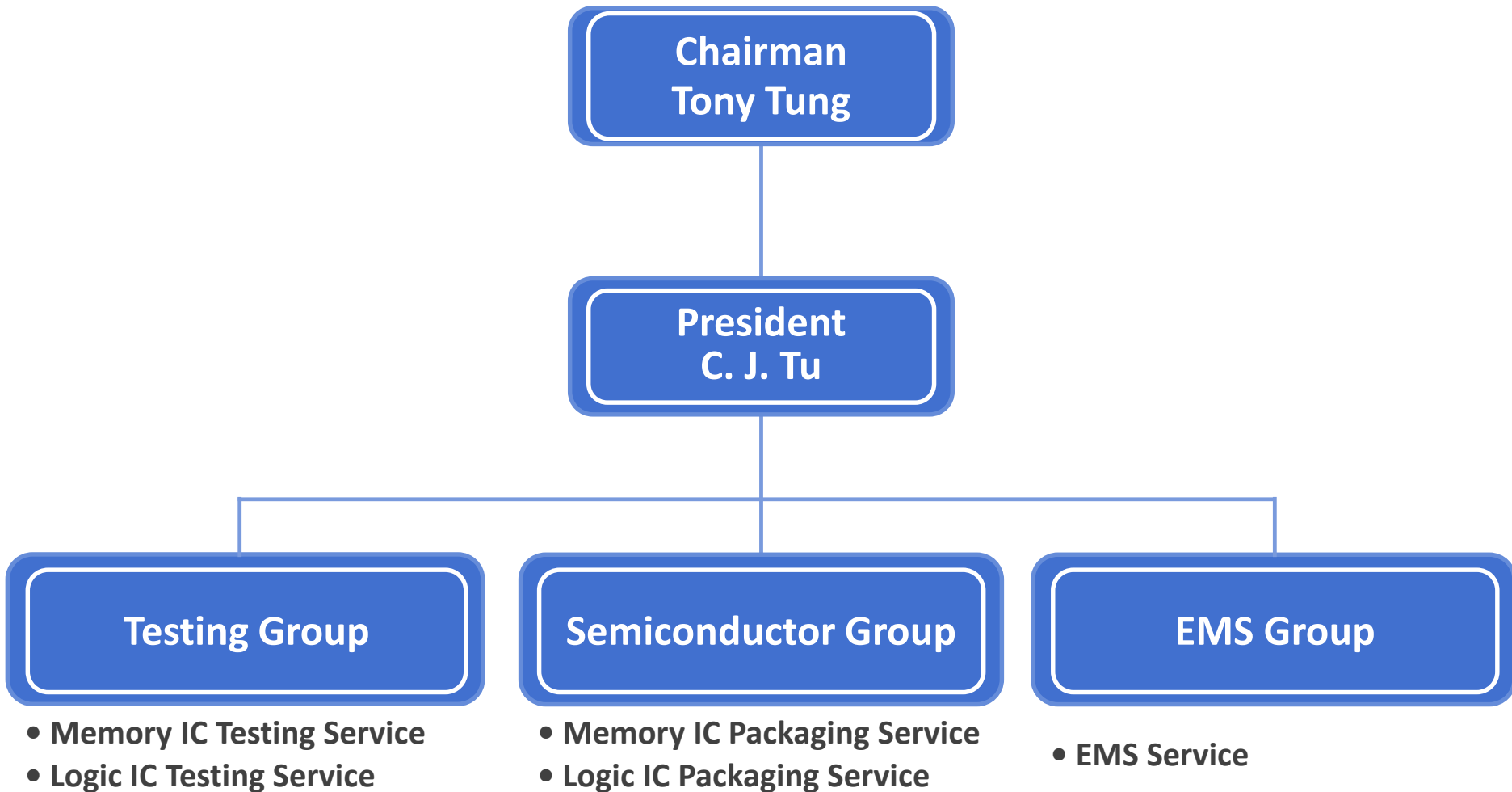


Facility 2
(5,625 M²)

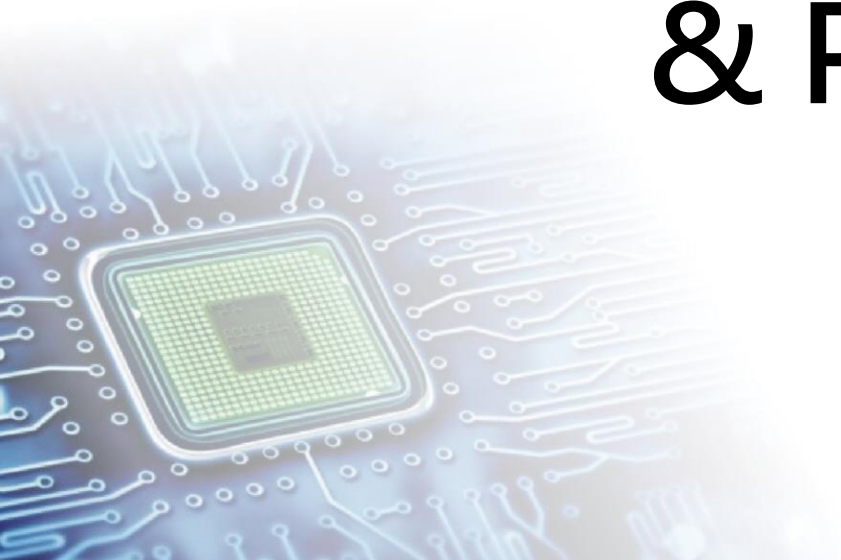


Facility 5 - EMS
(15,705 M²)

Corporate Structure

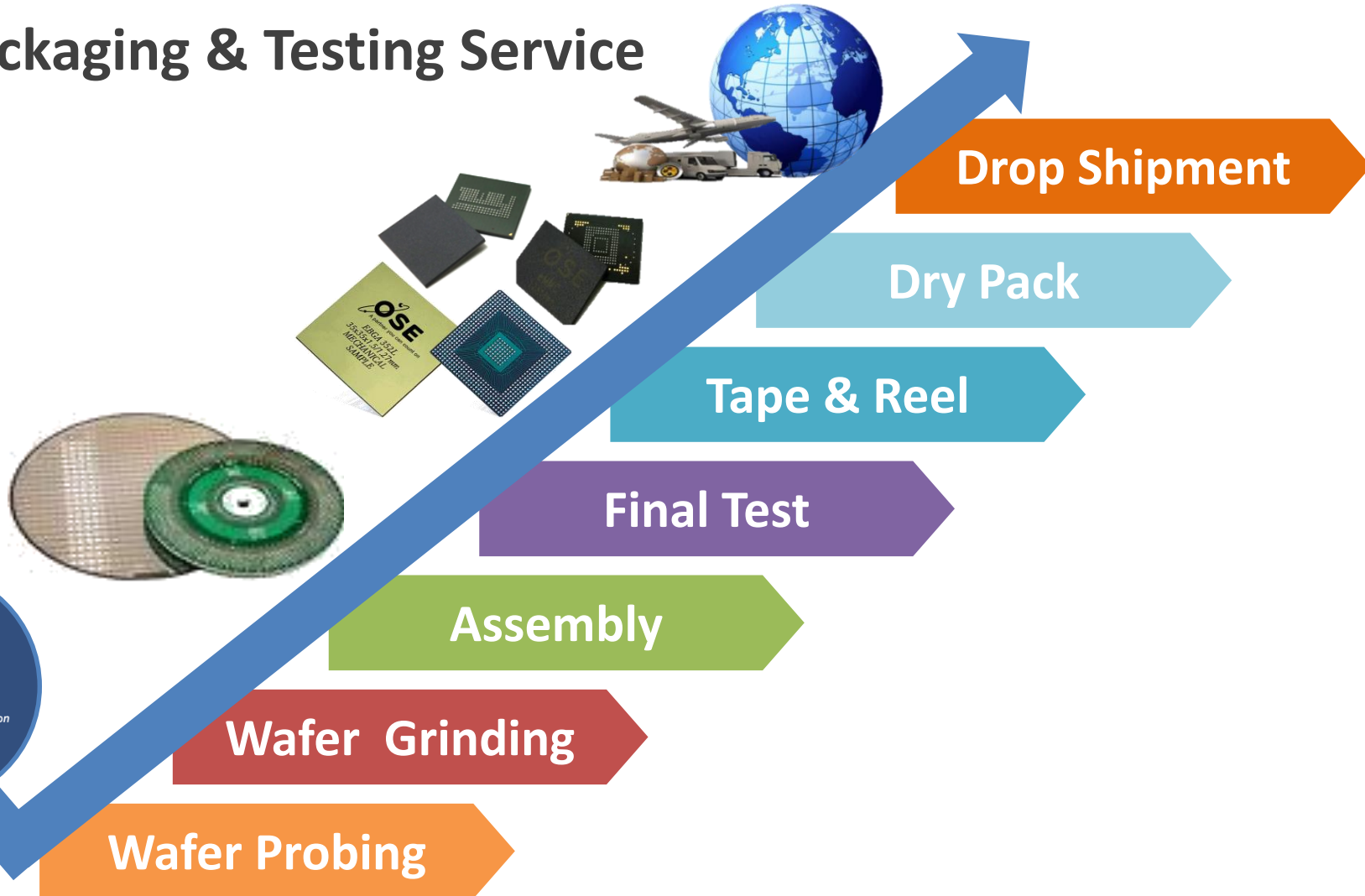


Manufacture Service & Product



Total Solution

>> IC Packaging & Testing Service

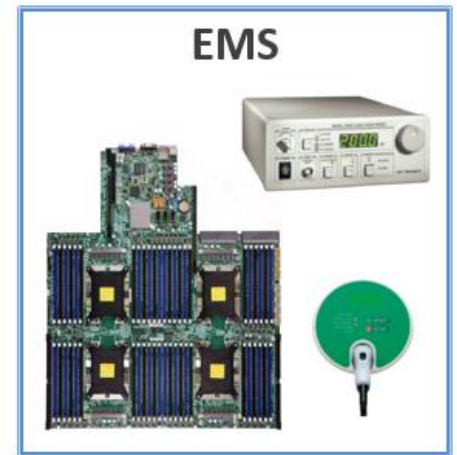
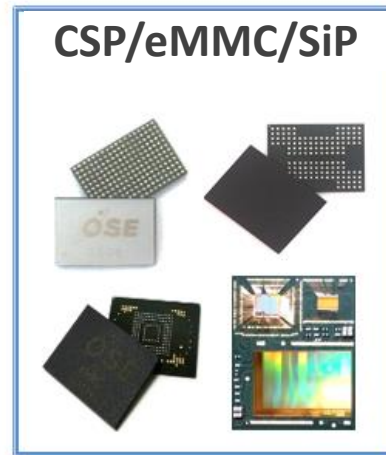
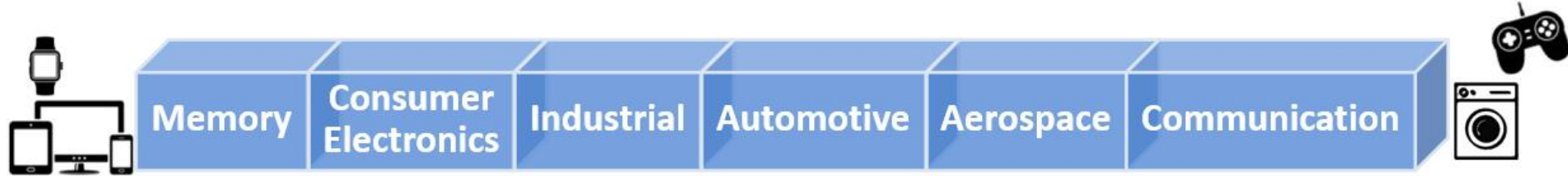


Total Solution

Electronics Manufacturing Service



Product Application



*Includes Wire Bond Type, Flip Chip Type, SiP, etc

2026 Q2

Financial Performance



CONSOLIDATED STATEMENTS OF COMPREHENSIVE INCOME (QoQ)

(Thousands of NTD)	Q2/2026	%	Q1/2026	%	Variance
Net revenue	5,476,218	100.00%	4,860,476	100.00%	12.67%
Gross profit	725,559	13.25%	621,703	12.79%	16.71%
Operating income (loss)	345,365	6.31%	272,602	5.61%	26.69%
Income (loss) before tax	453,261	8.28%	291,646	6.00%	55.41%
Income tax (expense) gains	(45,067)	(0.82%)	(57,016)	(1.17%)	(20.96%)
Non controlling interests	-	-	-	-	-
Net Income	408,194	7.45%	234,630	4.83%	73.97%
Basic EPS (in NTD)	0.62	-	0.33	-	-
EBITDA	756,929	13.82%	592,442	12.19%	27.76%

CONSOLIDATED STATEMENTS OF COMPREHENSIVE INCOME (YoY)

(Thousands of NTD)	Q2/2026	%	Q2/2025	%	Variance
Net revenue	5,476,218	100.00%	5,263,888	100.00%	4.03%
Gross profit	725,559	13.25%	787,827	14.97%	(7.90%)
Operating income (loss)	345,365	6.31%	419,883	7.98%	(17.75%)
Income (loss) before tax	453,261	8.28%	409,022	7.77%	10.82%
Income tax (expense) gains	(45,067)	(0.82%)	(21,829)	(0.41%)	106.45%
Non controlling interests	-	-	-	-	-
Net Income	408,194	7.45%	387,193	7.36%	5.42%
Basic EPS (in NTD)	0.62	-	0.54	-	14.81%
EBITDA	756,929	13.82%	669,705	12.72%	13.02%

Key Items & Index of Balance Sheet

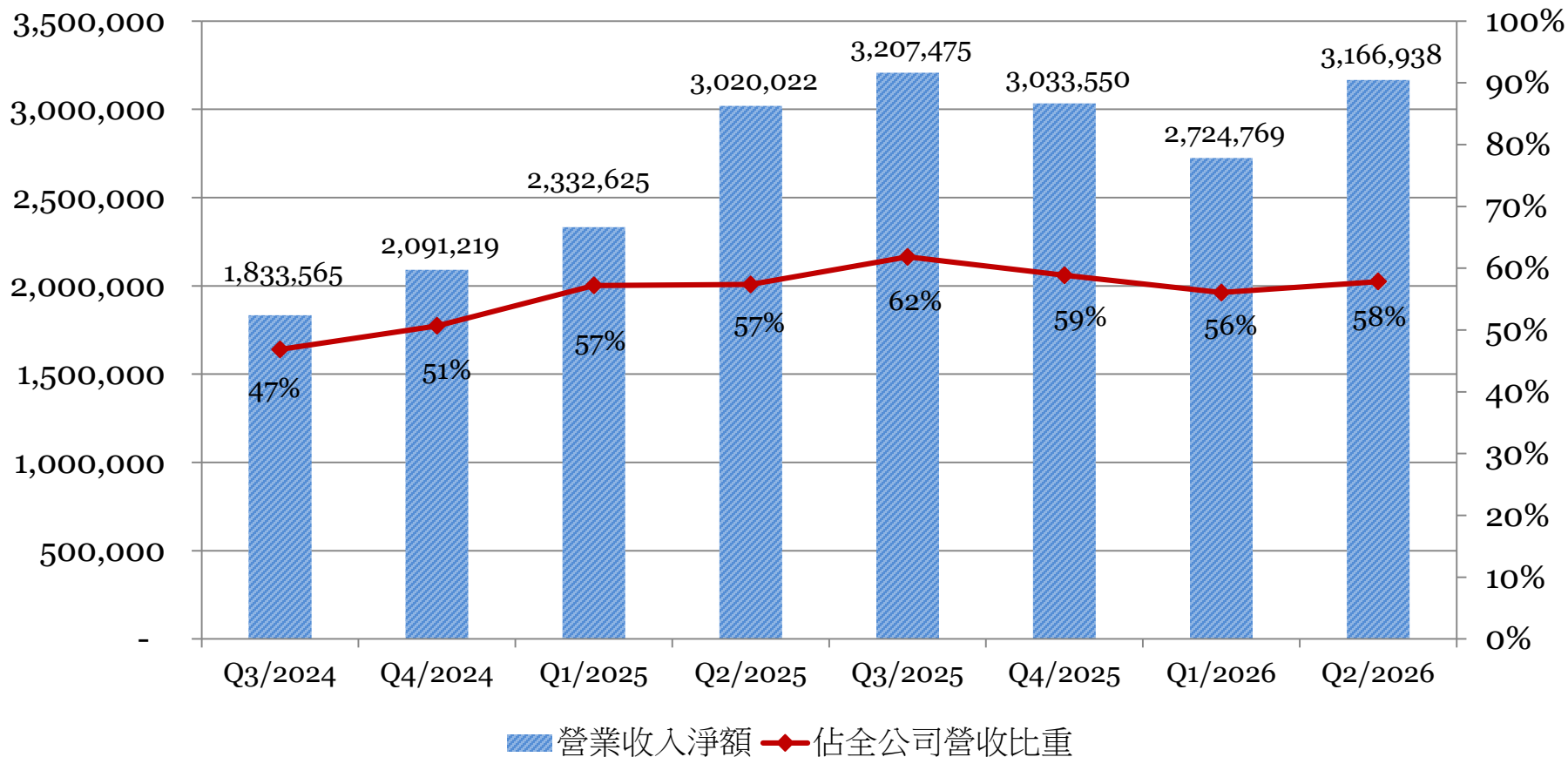
(Thousands of NTD)	Q2/2026	Q1/2026	Variance
Cash and cash equivalents	3,029,326	3,066,961	(1.23%)
Financial assets-Noncurrent & Investments-equity method	6,630,744	2,346,166	182.62%
Property, plant, and equipment	8,961,961	8,432,023	6.28%
Total assets	26,654,758	22,594,916	17.97%
Short-term loans & Short-term notes payable	281,052	224,000	25.47%
Long-Term Liabilities-Current Portion	147,336	184,002	(19.93%)
Bonds Payable	2,363,704	2,351,000	0.54%
Long-term loans	241,427	228,203	5.79%
Total liabilities	10,245,168	11,149,882	(8.11%)
Total stockholders' equity	16,409,590	11,445,034	43.38%
Quarterly EBITDA	756,929	592,442	27.76%
Index			
Debt ratio	38.44%	49.35%	
Accounts receivable turnover days(Q1)	74 Days	87 Days	
Inventory turnover days(Q1)	48 Days	59 Days	

Key Items & Index of Balance Sheet

(Thousands of NTD)	Q2/2026	Q2/2025	Variance
Cash and cash equivalents	3,029,326	3,437,751	(11.88%)
Financial assets-Noncurrent & Investments-equity method	6,630,744	1,441,800	359.89%
Property, plant, and equipment	8,961,961	6,982,388	28.35%
Total assets	26,654,758	20,317,276	31.19%
Short-term loans & Short-term notes payable	281,052	-	100.00%
Long-Term Liabilities-Current Portion	147,336	465,872	(68.37%)
Bonds Payable	2,363,704	0	-
Long-term loans	241,427	897,925	(73.11%)
Total liabilities	10,245,168	9,163,846	11.80%
Total stockholders' equity	16,409,590	11,153,430	47.13%
	-	-	-
Quarterly EBITDA	756,929	669,705	13.02%
Index			
Debt ratio	38.44%	45.10%	
Accounts receivable turnover days(Q1)	78 Days	91 Days	
Inventory turnover days(Q1)	51 Days	39 Days	

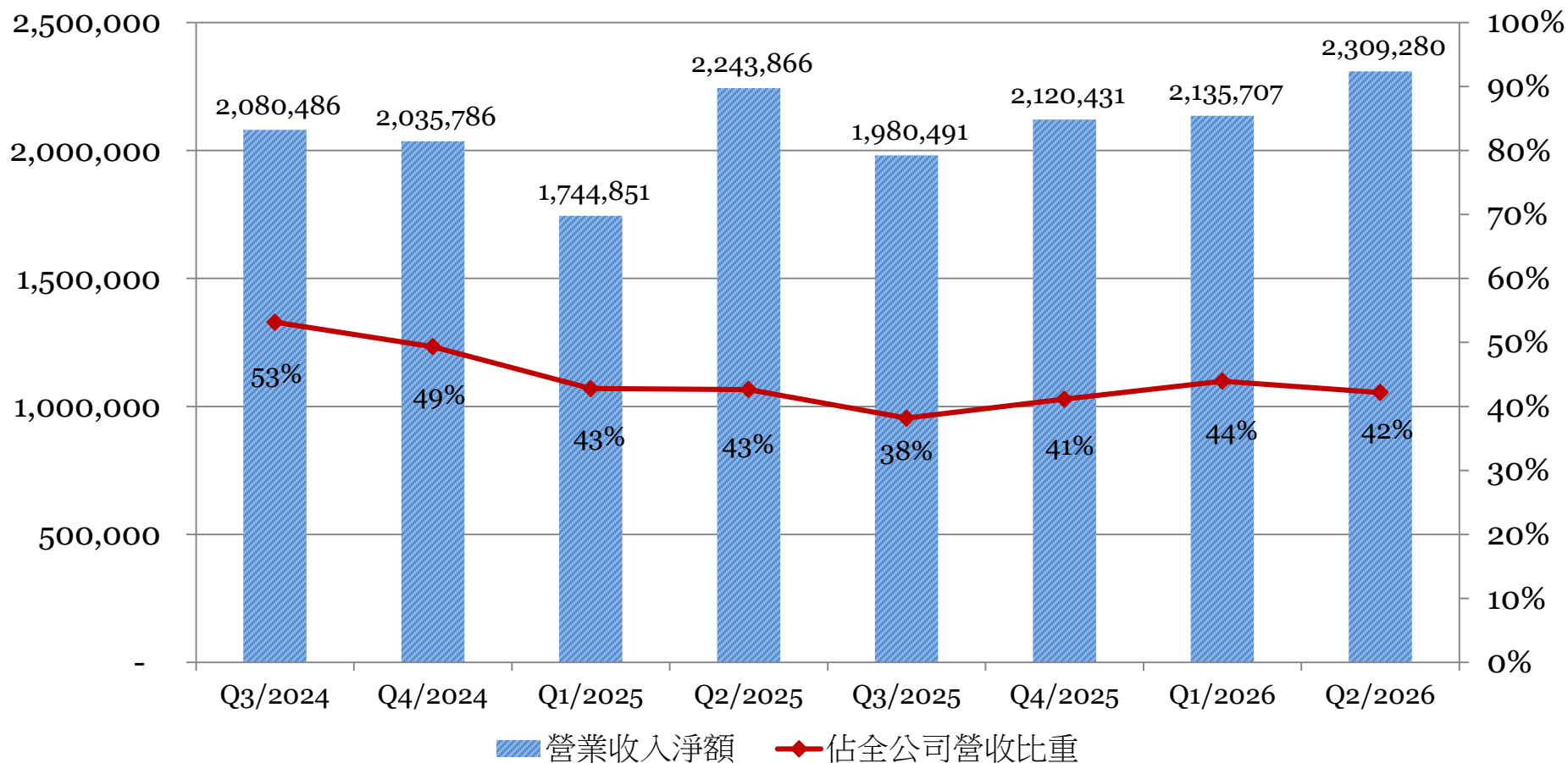
IC Packaging and Testing Services

(Thousands of NTD)



Electronics Manufacturing Services

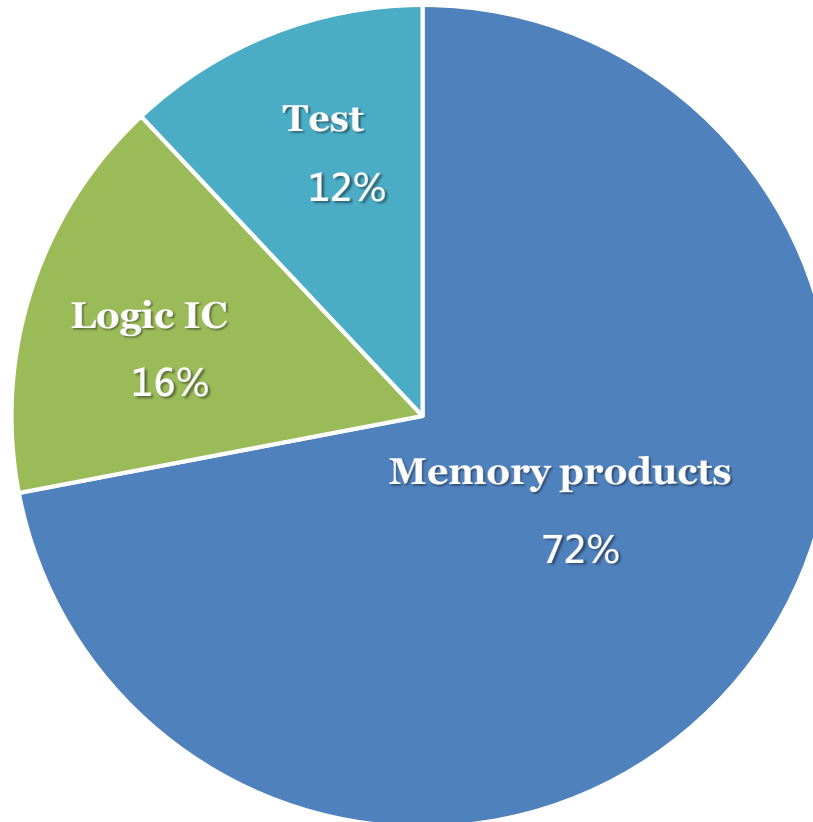
(Thousands of NTD)



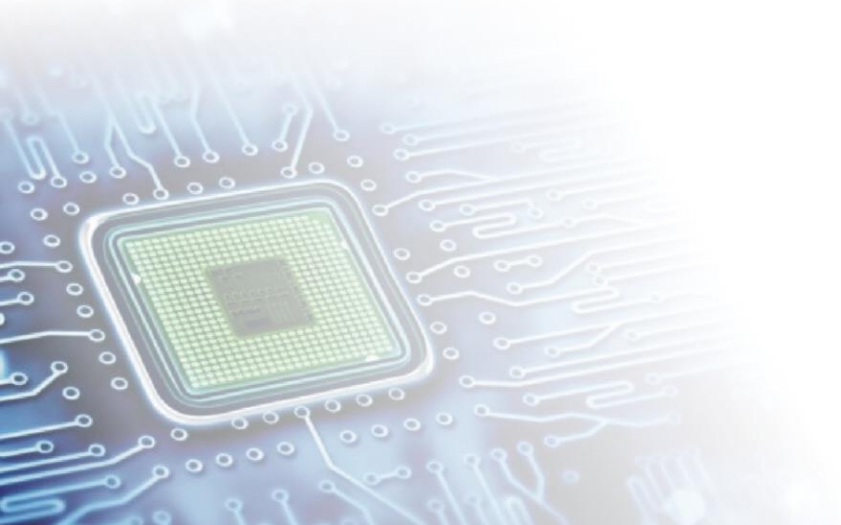
Semiconductor Group

-Percentage of revenue by product application

Q2/2026



Outlook of 2026 Q4 Onward



2026 Update to date

- **Memory Industry: Supply-Demand Imbalance**
 - AI-driven demand has re-shaped the memory market, impacting demand for consumer electronics.
 - NAND demand is rapidly shifting from consumer electronics toward AI Data Center, enterprise SSDs, and high-capacity storage solutions.
 - The memory market continues to favor suppliers.
- **IC BU:**
 - Memory IDMs become our TOP 10 customers.
 - As memory IDMs phase out low-capacity eMMC products(End of life.) Demand from domestic memory customers keeps strong.
 - Q2 capacity utilization was approximately 70%.
- **EMS BU:**
 - AI investment by CSP remains robust. AI Customer' s orders remains positive.

2026 Q4 Onward(IC BU)

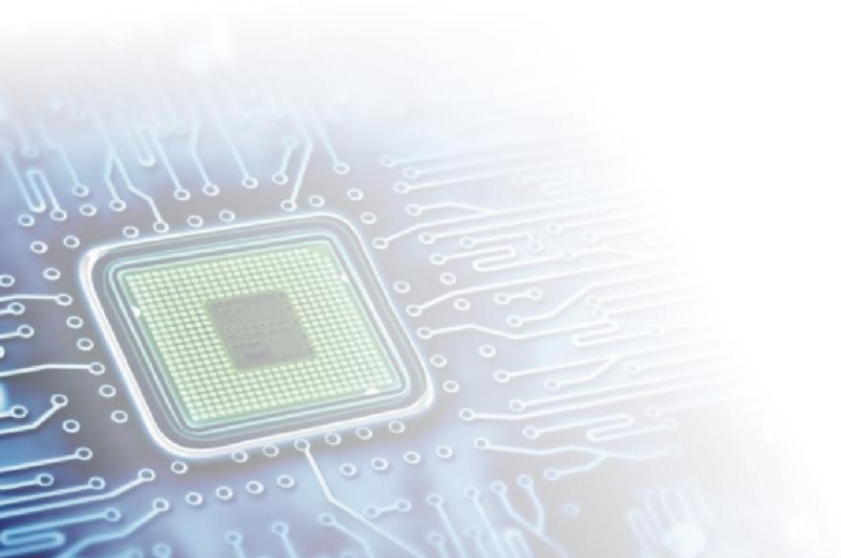
● IC BU: A Memory Manufacturing Platform

- The revenue from **memory IDM customers** continues to increase, supporting steady business growth.
- Enterprise SSD (eSSD for AI server, Data Center etc.) launch shipments, to provide AI customers One-stop shopping: from Wafer CP, packaging, testing, and SMT.
- Demand for **eMMC** from customers **keeps strong**.
- The **spillover effect** from logic IC packaging and testing.
- **Hybrid Bonding(w/b+ FC)** : To address growing high-speed data transmission requirements, (e.g. microSD 7.0 、eUFS 4.x 、μSSD etc.) · are expected to become future growth drivers (Memory+Controller System-in-Package, SiP)
- Future Development:
 - **Fan-Out FCCSP** advanced packaging (currently under joint development with customers.)

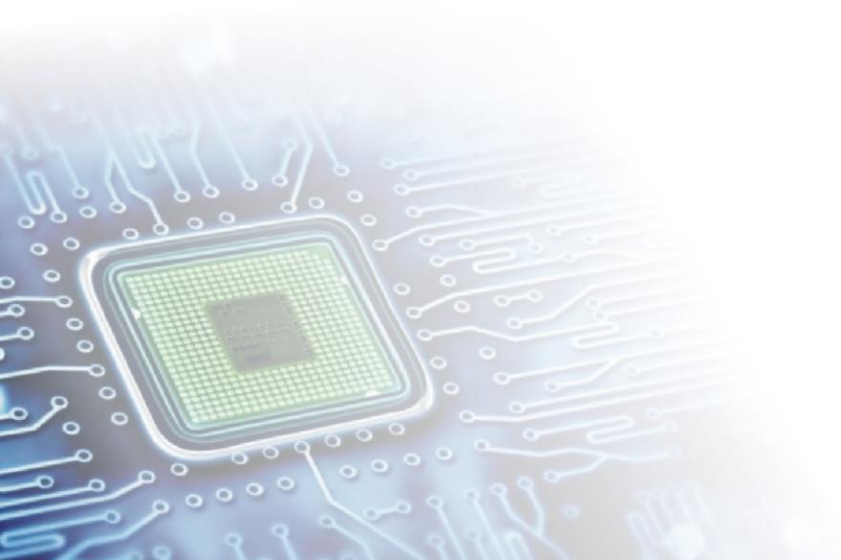
2026 Q4 Onward(EMS BU)

- EMS BU: A Key Supply Chain Partner for AI Customers
 - The outlook for AI customer orders remains positive.
 - Enterprise SSD memory modules have begun shipments to AI customers and are expected to become a growth driver next year.

Q&A



Thank you



Disclaimer

The presentation and the relevant information mentioned in this material have been compiled from both internal and external resources.

These forward looking statements involve known and unknown risks, uncertainties and other factors, including price variation, competition, global economy, exchange rate movement and market demand, which may cause actual results to differ materially from those implied by such forward-looking statements.

The forward looking statements expressed in this material reflect the Company's current view about the future as of today. The Company is not responsible for any updates if there are any changes in the future.