



Interim Financial Briefing for the Fiscal Year Ending March 31, 2026

TOKYO ELECTRON DEVICE

October 30, 2025

Financial Report

Corporate Director, Senior Executive Vice President: Takayoshi Miyamoto

Forecast for the Fiscal Year Ending March 31, 2026

President & Representative Director, CEO: Atsushi Tokushige



Financial Report

Corporate Director

Senior Executive Vice President: Takayoshi Miyamoto

Year-on-Year Comparison: Decrease in sales and income

Net sales	13.8% decrease
Ordinary income	40.3% decrease
Net income attributable to owners of the parent	40.1% decrease

Compared to the interim earnings forecast

Net sales	+ 5.3%
Ordinary income	+ 11.1%
Net income attributable to owners of the parent	+ 12.2%

Summary of Financial Results: Comparison with Prior Year

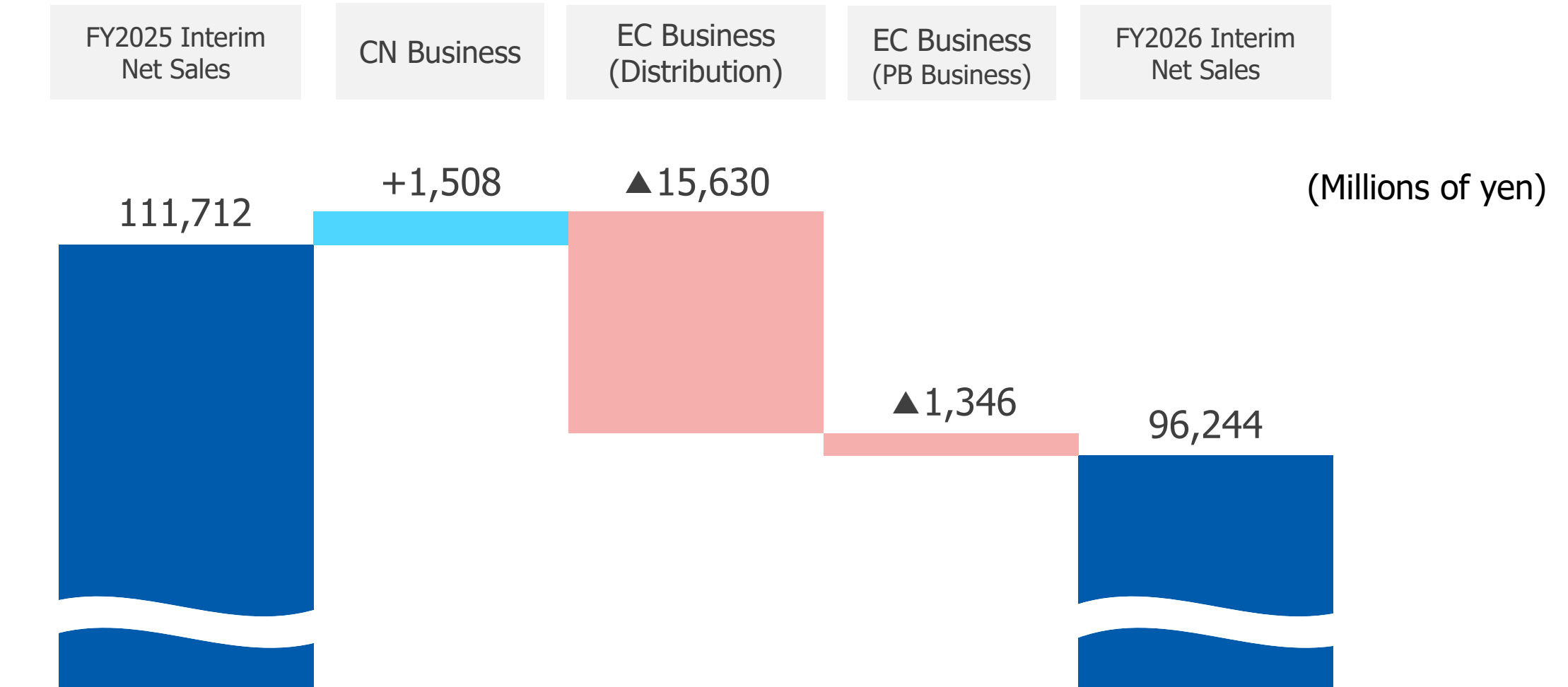


(Millions of yen)

	FY2025 Interim	FY2026 Interim	Change	FY2026 Forecast Announced Apr. 28
Net sales	111,712	96,244	(15,468)	91,400
Cost of sales	95,288	82,398	(12,889)	
Gross profit	16,423	13,845	(2,578)	
Selling, general & administrative expenses	10,131	10,283	152	
Operating income	6,292	3,561	(2,730)	
Non-operating income	203	286	83	
Non-operating expenses	348	180	(167)	
Ordinary income	6,147	3,667	(2,480)	3,300
Interim net income	4,305	2,580	(1,725)	2,300
Number of employees	1,387	1,424	37	

* Interim net income is interim net income attributable to owners of the parent.

Summary of Financial Results: Change in Net Sales



In the segment categories, the PB Business is included in the EC Business.
The PB Business includes Tokyo Electron Device Nagasaki Limited.

Sales and Income by Segment

- CN Business: Sales of storage-related products and security-related products were strong. Sales of maintenance & monitoring services also expanded, driving increased revenue and profits.
- EC Business: Despite expanding customer commercial rights, revenue and profits declined due to the prolonged impact of customer inventory adjustments.

(Millions of yen)

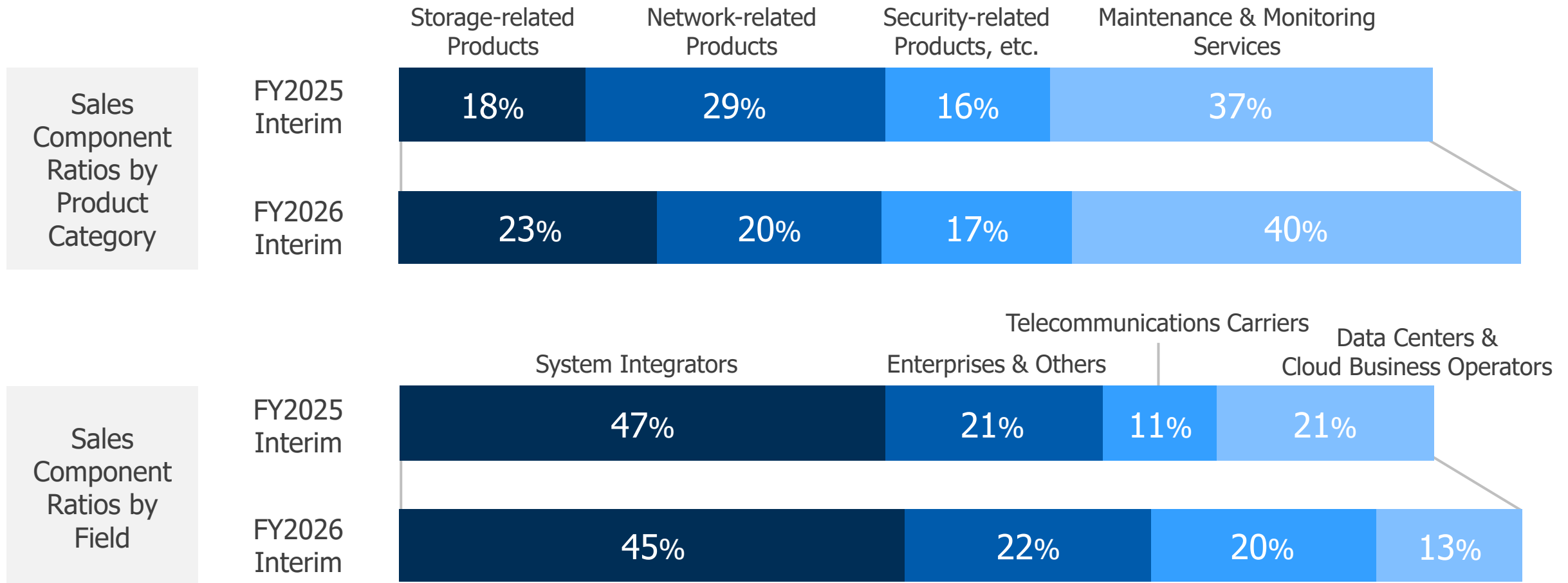
	FY2025 Interim		FY2026 Interim			
	Net Sales	Segment Income	Net Sales	Change (rate of change)	Segment Income	Change (rate of change)
Computer Networks (CN)	17,687	2,168	19,195	1,508 +8.5%	2,608	439 +20.3%
Electronic Components (EC)	94,024	3,978	77,048	(16,976) -18.1%	1,058	(2,920) -73.4%
Total	111,712	6,147	96,244	(15,468) -13.8%	3,667	(2,480) -40.3%

* Segment income is ordinary income

* In the segment categories, the PB Business is included in the EC Business

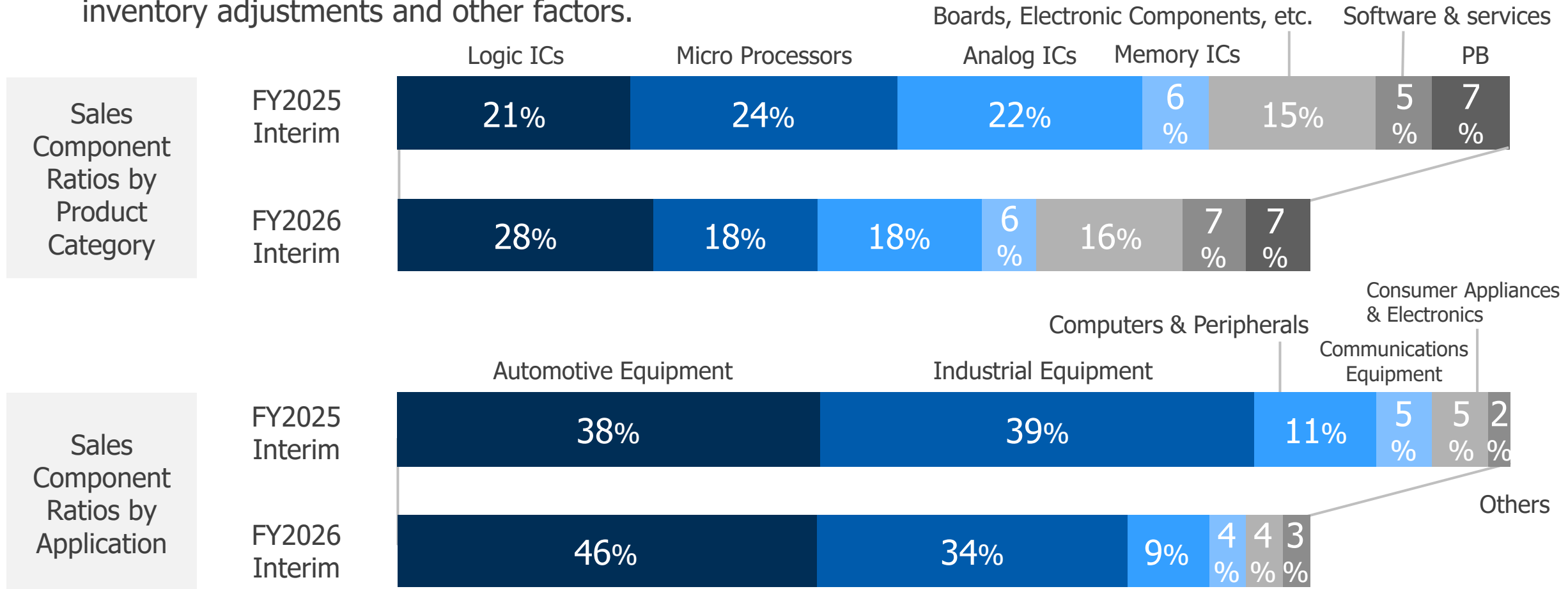
Segment Information: CN Business

- Storage-related products: Sales for telecommunications carriers were strong.
- Network-related products: Sales for data centers & cloud business operators declined.
- Maintenance and monitoring services: Sales for telecommunications carriers and system integrators were strong.



Segment Information: EC Business

- Automotive equipment: Sales of logic ICs increased due to expanded commercial rights. Sales of analog ICs and micro processors decreased due to customer inventory adjustments, resulting in overall sales remaining at the same level as the previous year.
- Industrial equipment: Sales of micro processors and analog ICs declined due to prolonged customer inventory adjustments and other factors.



Consolidated Overseas Subsidiaries: Net Sales

- Sales of computers & peripherals were sluggish.

	FY2025 Interim	FY2026 Interim	Change	Rate of Change
Consolidated overseas subsidiaries net sales (¥ millions)	26,406	20,455	(5,951)	-22.5%
Consolidated overseas subsidiaries net sales ratio	28.1%	26.5%		
Consolidated overseas subsidiaries net sales (\$ millions)	172	140	(32)	-19.0%
Exchange rate (yen)	152.78	146.02		

* The net sales ratio is the ratio to EC Business net sales.

PB Business: Net Sales

- TED: Sales of wafer inspection system business declined due to ongoing inventory adjustments by customers. And sales of design & manufacturing service remained sluggish for industrial equipment.
- TED Nagasaki: In-house developed products of information and communications equipment was performing well.

(Millions of yen)

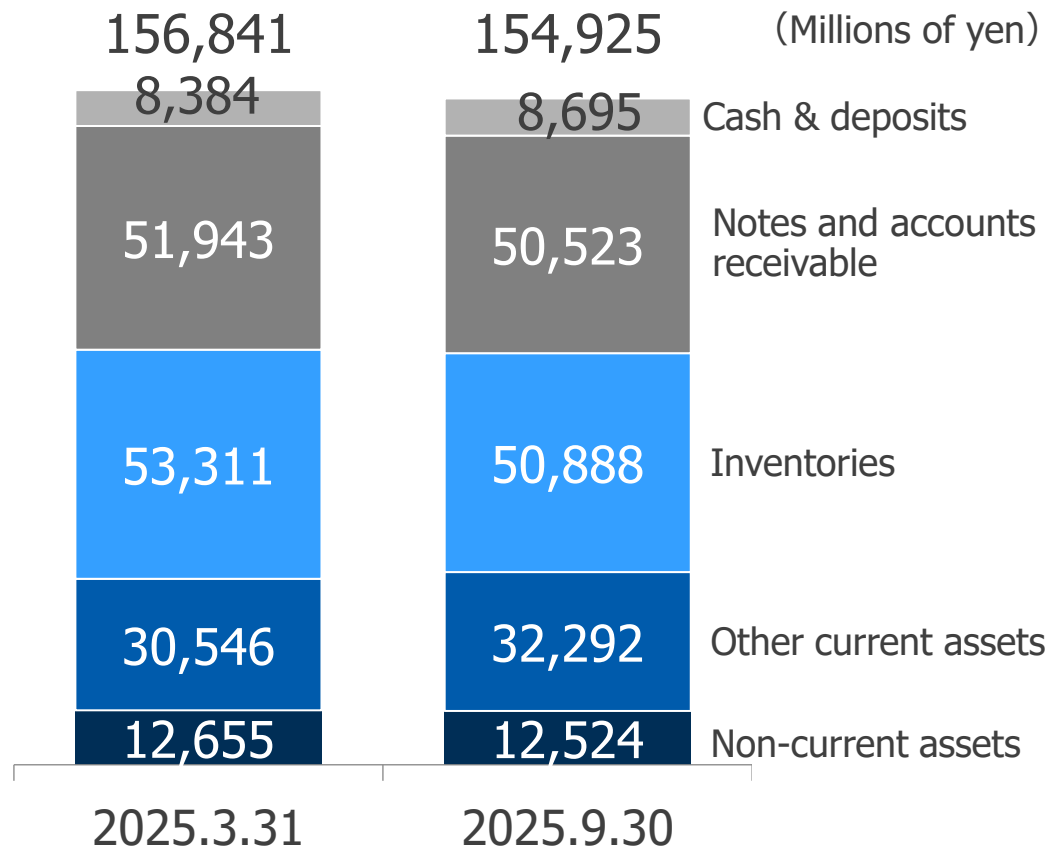
	FY2025 Interim	FY2026 Interim	Change	Rate of Change
PB business net sales	6,986	5,639	(1,346)	-19.3%
Net sales ratio	7.4%	7.3%		

* The net sales ratio is the ratio to EC Business net sales.

Balance Sheet

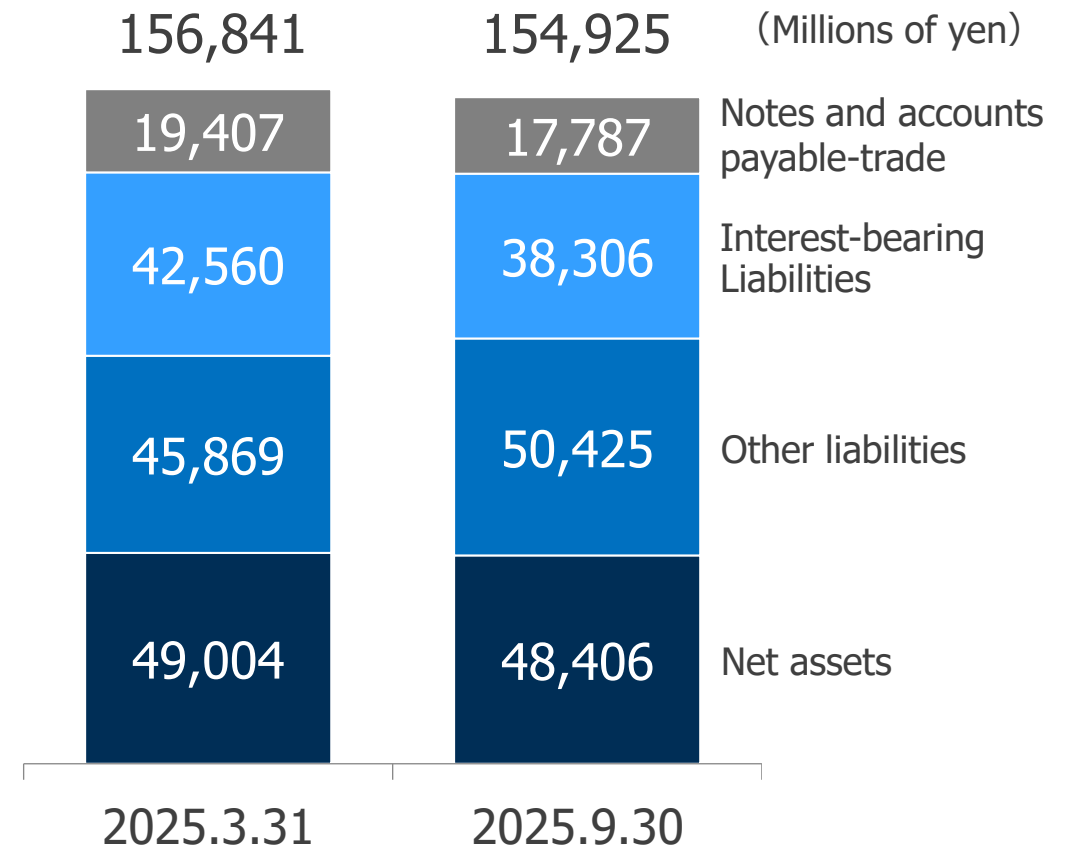
Assets

- Notes and accounts receivable and inventories decreased due to lower sales.
- Prepaid expenses increased due to growth in maintenance service business.

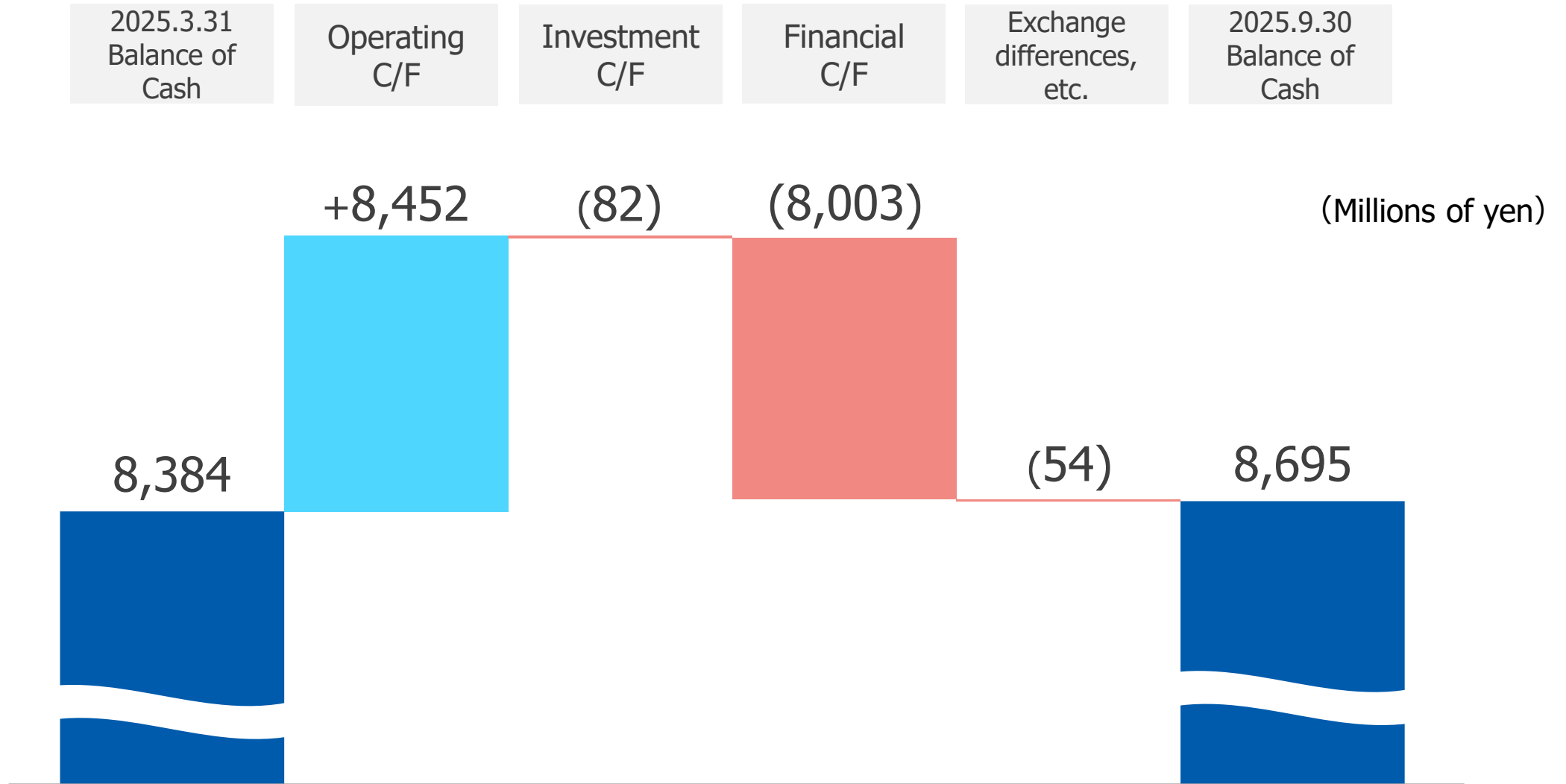


Liabilities & Net Assets

- Interest-bearing liabilities decreased due to decrease in working capital.
- Advance payments increased due to growth in maintenance service business.

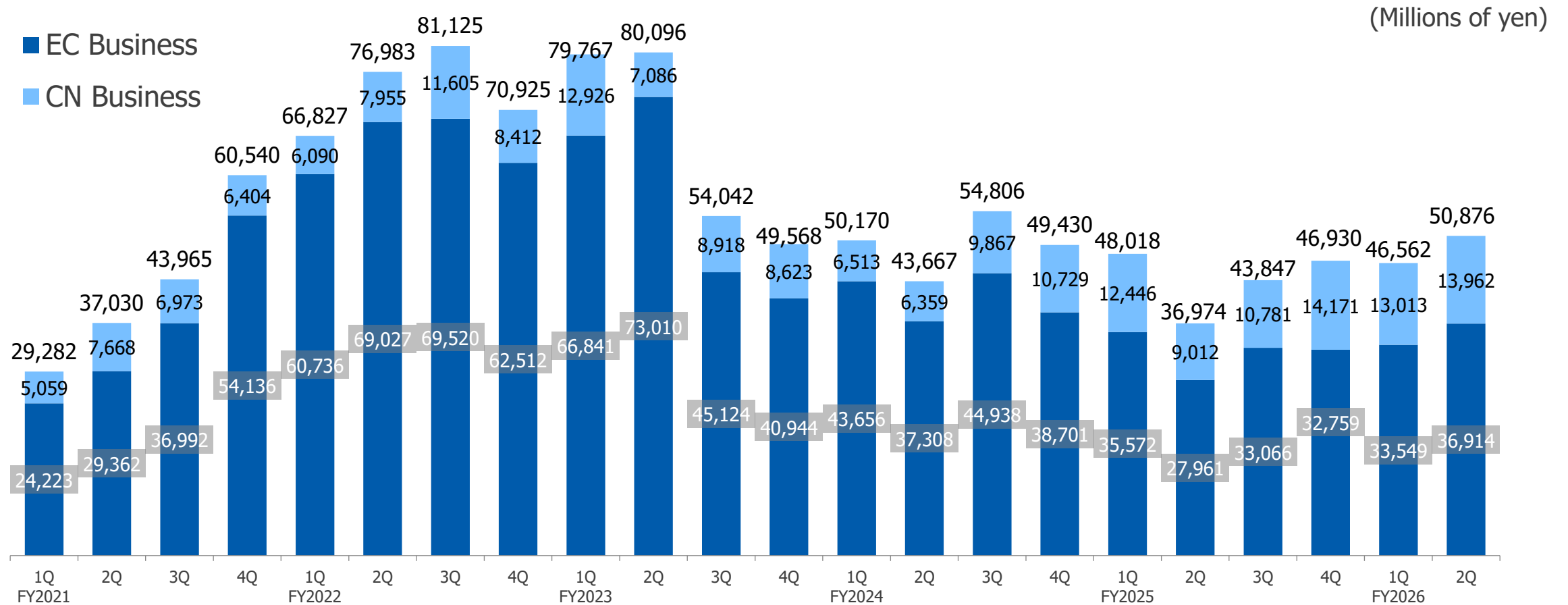


Statement of Cash Flows



Changes in Orders Received

- CN Business: IT investment remains steady. Sales of both products and maintenance & monitoring services were performing well.
- EC Business: Customer inventories are gradually returning to normal levels, but demand has not yet fully recovered.





Forecast for the Fiscal Year Ending March 31, 2026

President & Representative Director, CEO:

Atsushi Tokushige

- Full-Year Consolidated Earnings Forecast Revised
Ordinary income: 9.0% decrease, Net income: 2.9% increase
- EC and PB Business continues to be in a period of adjustment.
- CN Business performed steadily.

Continue to closely monitor the impact of US tariff measures
(Not included in the business plan)

FY2026 Full-Year Consolidated Earnings Forecast



(Millions of yen)

	FY2025	FY2026			
		A: Previous forecast (April 28, 2025)	B: Revised forecast (October 29, 2025)	Change	
				B - A	Rate
Net sales	216,379	200,000	200,000	-	-
Ordinary income	11,415	10,000	9,100	(900)	-9.0%
Net income	8,874	7,000	7,200	200	+2.9%

* Net income is net income attributable to owners of the parent

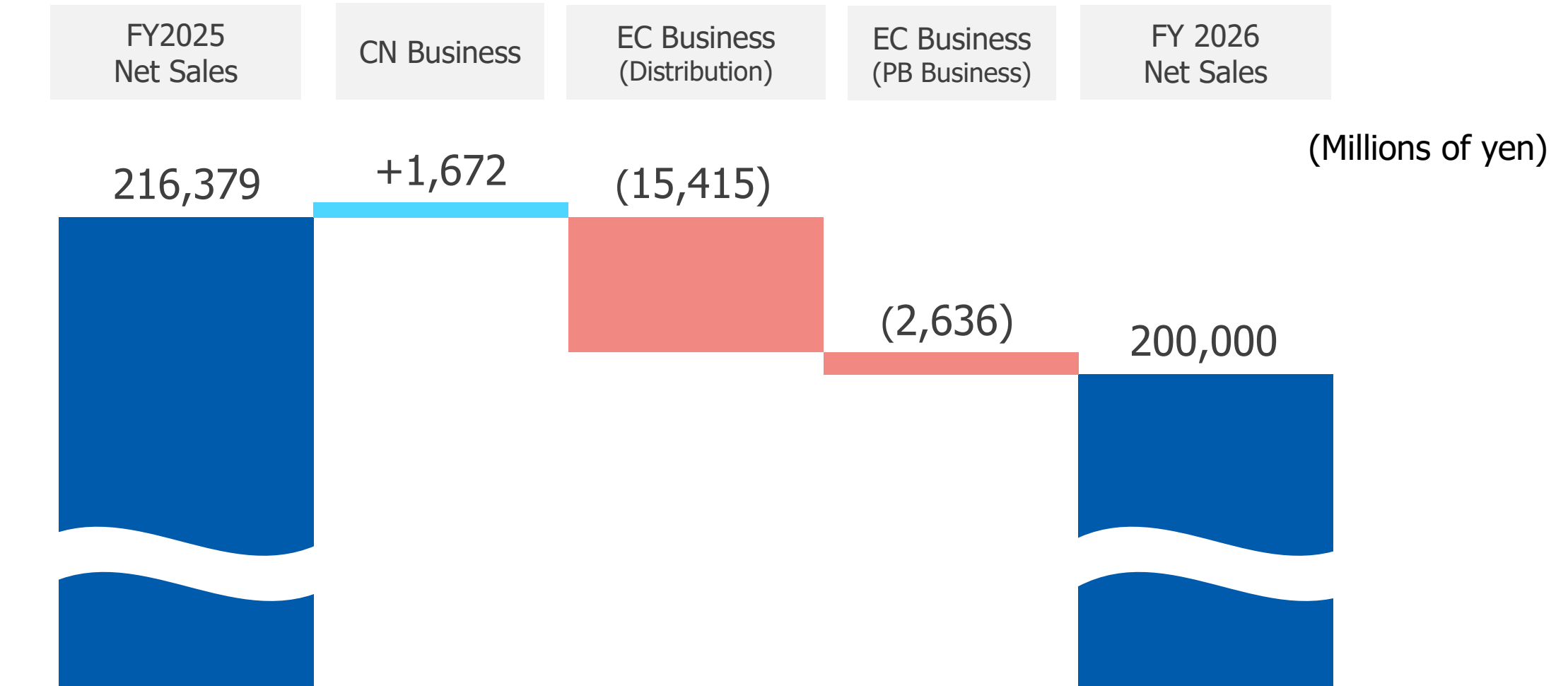
FY2026 Forecast of Financial Results by Segment

(Millions of yen)

	FY2025	FY2026			YoY Change	
	Full year	1st Half Actual	2nd Half Forecast	Full Year Forecast	Change	Rate of Change
Net sales	216,379	96,244	103,755	200,000	(16,379)	-7.6%
CN Business	37,327	19,195	19,804	39,000	1,672	+4.5%
EC Business (consolidated)	179,051	77,048	83,951	161,000	(18,051)	-10.1%
EC Business	164,415	71,408	77,591	149,000	(15,415)	-9.4%
PB Business	14,636	5,639	6,360	12,000	(2,636)	-18.0%
Ordinary income <i>income ratio</i>	11,415 5.3%	3,667 3.8%	5,432 5.2%	9,100 4.6%	(2,315)	-20.3%
Net income <i>income ratio</i>	8,874 4.1%	2,580 2.7%	4,619 4.5%	7,200 3.6%	(1,674)	-18.9%

* Net income is net income attributable to owners of the parent

FY2026 Forecast of Financial Results, Changes in Net Sales



In the segment categories, the PB Business is included in the EC Business.
The PB Business includes Tokyo Electron Device Nagasaki Limited.

Assumptions of Business Plan (Business Environment)

		FY2026		FY2027
		1 st Half	2 nd Half	Full Year
		Adjustment Period		Recovery Period
EC · PB	Semiconductor	High level of inventory in customer site	Gradual inventory normalization, steady recovery trend	
	Semiconductor wafer	Inventory adjustments remain sluggish		Gradually recovering
	Industrial equipment	Weak		
	Automotive equipment			Gradually recovering
	Chinese market	Prolonged stagnation		Gradually recovering
	Commercial rights	Contribution of new customer commercial rights		
CN	IT market	IT market, especially security, remains steady		
Exchange rate trends		Average rate: 146.02 yen	Assumed range: 145~150 yen	—

- **Expansion of solution areas**

Agreement with new overseas vendors and commencement of sales

	 Security	 AI	
Company name			
Head Office	New Jersey, USA	California, USA	California, USA
Key Point	First entry into Japan	First entry into Japan	AI platform of integrated corporate knowledge utilization
Overview	Detect, defend against, and recover from threats to Active Directory (AD)	Enhance the safety of generative AI and improve operational efficiency	Rapid and secure implementation of generative AI for enterprises

Addressing diverse customer needs across various fields, with a focus on security and AI

- **Expanding the product lineup of inspection system and customer base**

First unit of SiC (silicon carbide) wafer inspection system shipped to an overseas manufacturer



SiC Wafer Inspection System

- Commencement of global sales
- Achieving comprehensive inspection (front/back surfaces and edge surfaces) of SiC wafers
- Enhanced speed and automation capabilities by increased processing capacity

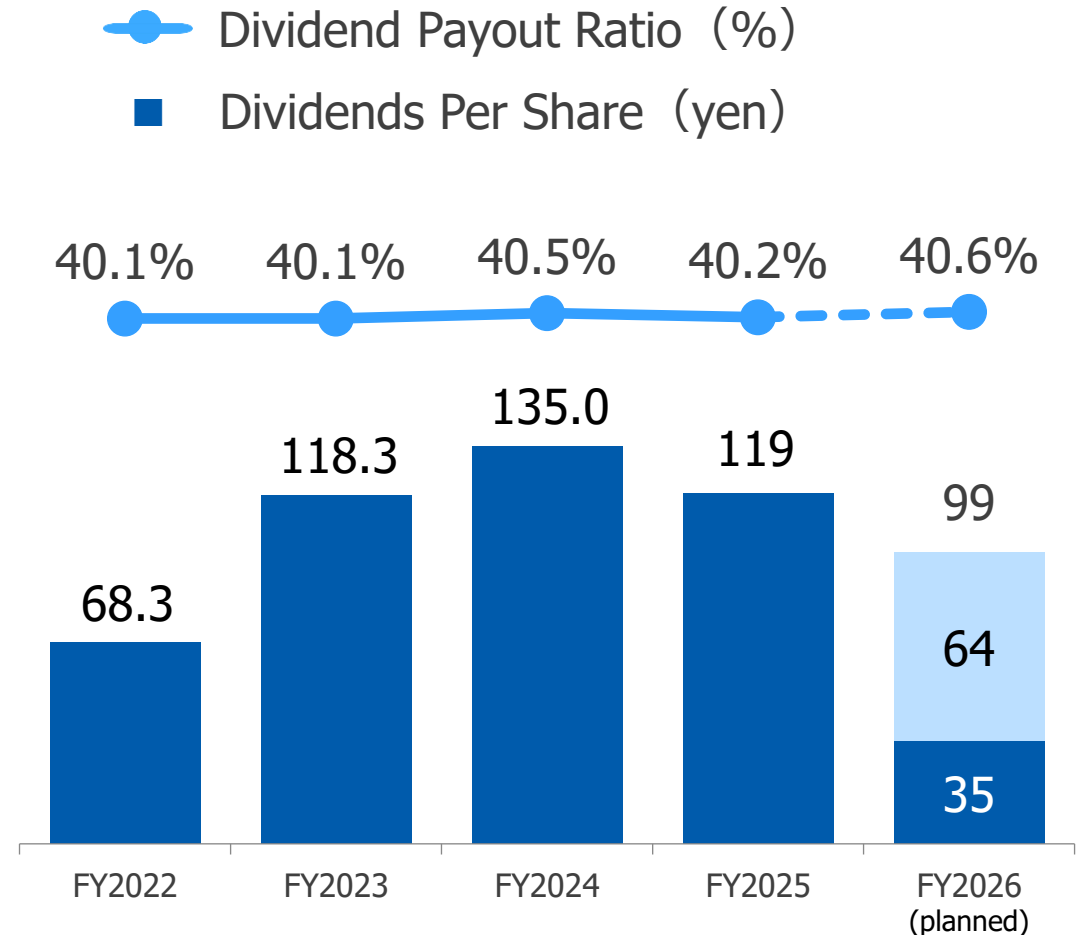
Expanding sales channels for inspection system of compound semiconductor wafers

Dividends Per Share

(yen)

	FY2025	FY2026	
		Beginning of term	10/29 Revised
Interim	52	32	35
Year-End	67	64	(planned) 64
Full-year	119	96	(planned) 99

Dividends / Dividend Payout Ratio



Dividend policy

- Long-term high returns through profit growth
- Performance-based shareholder returns
Dividend payout ratio: approximate 40%

* 3-for-1 stock split of common stock as of October 1, 2023 (Dividend amounts prior to September 2023 are presented assuming the stock split had taken place)



Connect Beyond

Cautionary Notes Regarding this Document

The forward-looking projections in this document were developed based on information available at this time. Please note that the Company's actual future results may differ from those indicated in this document due to various factors that have direct and indirect impacts on the Company's results.

If any material changes are made, the Company will announce them at that time.

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Note : This document has been translated from the Japanese original for reference purposes only. In the event of any discrepancy between this translated document and the Japanese original, the original shall prevail.



Supplementary Materials

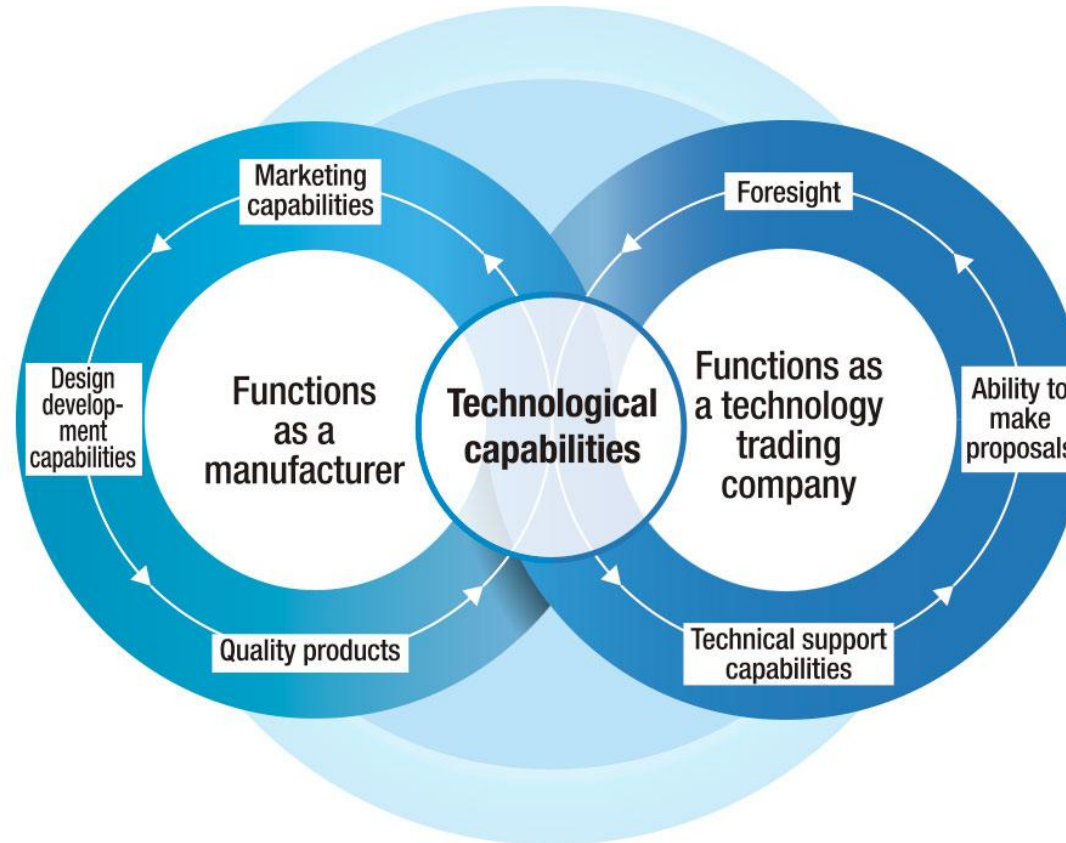
List of Supplementary Materials

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To address social issues through leading-edge technology, primarily semiconductors and IT, and to contribute to the sustainable development of society by offering solutions to those issues that have value beyond expectations



**A company that solves latent social issues
with the capabilities of a manufacturer and
a technology trading company**



VISION 2030: Companywide Policy

1

Aim to solve latent social issues (customer issues) with the capability of being a manufacturer and technology trading company

- All business units will work on in-house products (services) development and create Group synergies to propose solutions to problems with value that exceeds expectations
- The Technology Trading Company Department will acquire new distributor agreements and customer commercial rights to strengthen marketing to address potential issues
- Actively utilize M&A to quickly establish a business foundation that enables problem-solving



2

Take actions that contribute to sustainable profit growth

- Actively invest in in-house products (services) development that can differentiate the Company's products
- Transition from a flow-type to a stock-type service business
- Invest to increase medium- to long-term profit (research and development, human resources recruitment, employee training, etc.)



Management Policy by Business

CN Business

- Understand customer needs and offer solutions and services that support customer's DX
- Support customer's use of digital technology and increase customer satisfaction

EC Business

- Focus on growth markets such as industrial equipment, automotive-related equipment, cloud services, and the OT security field
- Leverage specialized semiconductor knowledge and develop a solutions-based business

PB Business

- Provide products centered on wafer inspection systems globally with measurement and inspection technology at the core
- Strengthen medical ODM and board OEM services by leveraging semiconductor-related technology and high-quality development and manufacturing infrastructure

VISION 2030 Financial Model (Target Management Indicators)



Pursuing Sustainable Profit Growth with Profit and Revenue Growth
(Profit Growth Outpacing Revenue Growth)

Fiscal 2030

- Net sales $\text{¥}300.0 \sim \text{¥}350.0$ billion
- Ordinary income ratio $\geq 8\%$
- ROE $\geq 20\%$

	Percentage of total sales	Ordinary income ratio
CN Business	15 %	12 %
EC Business	75 %	7 %
PB Business	10 %	10 %

Further improvement of enterprise value through sustainable profit growth

Growth Investment

Investment for sustainable growth

- Aggressive investment for technology development and business expansion (including M&A)
- Investment in internal and external DX to strengthen competitiveness
- Actively invest in human resource development

Shareholder Return

Long-term high returns due to profit growth

- Achieve sustainable profit growth and improve enterprise value
- Shareholder returns according to financial results (dividend payout ratio: 40% target)

Financial Soundness

Strengthen financial structure and appropriate financial leverage

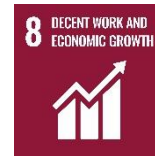
- Equity ratio: 40% or more
- ROE: 20% or more
- Maintain appropriate inventory levels

Fundamental Policy

- Contribute to the sustainable development of a more prosperous society by providing a variety of solutions through our business activities.
- Aim for the sustainable development of the Group and the enhancement of corporate value by engaging in solutions to material issues

Material issues

1. Leverage the resources that the Company has accumulated with a focus on electronics and IT to contribute to the realization of a sustainable society
2. With respect for fundamental human rights at the core, create work environments and personnel systems that facilitate work and provide meaningful work and pursue the sustainable development of the Company
3. Mitigate environmental burdens (environmental risks) that occur as a result of business activities and strive to maintain a sustainable relationship between society and the Company



Human Capital / Diversity

- Develop human resources who can pursue customer satisfaction from a global perspective
- Create an environment that supports employees' desire to improve and develops their individual abilities
- Focus on developing next generation leaders

Climate Change

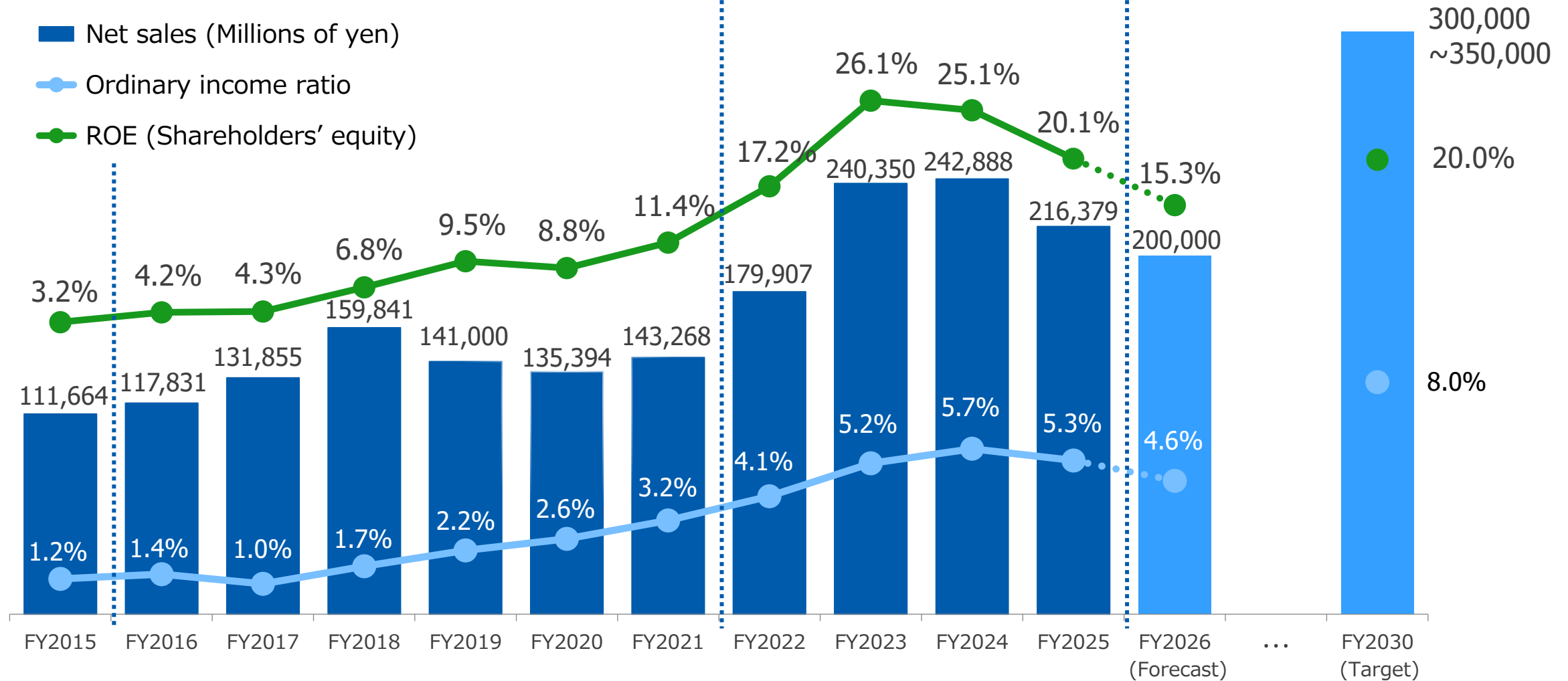
- Aim for carbon neutrality in FY2050 and set target for FY2030 (50% reduction compared to FY2021)
- From October 2023, the Engineering Center (Tsuzuki, Yokohama) will switch to electricity derived from virtually renewable energy.

Medium-Term Management Plan: Results and Plan

VISION 2020

VISION 2025

VISION 2030



Financial Highlight (1/2)



(Millions of yen)

	FY2024				FY2025				FY2026			
	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q
Net sales	59,012	60,685	60,049	63,140	56,607	55,105	50,383	54,283	45,136	51,107		
CN Business	7,099	7,253	6,587	12,037	8,741	8,946	8,460	11,179	8,741	10,453		
EC Business	51,912	53,431	53,462	51,102	47,865	46,158	41,923	43,103	36,394	40,653		
Cost of sales	50,091	51,594	51,049	52,984	47,411	47,876	42,131	45,226	38,681	43,716		
Gross profit	8,921	9,090	8,999	10,156	9,195	7,228	8,252	9,056	6,454	7,391		
Profit rate	15.1%	15.0%	15.0%	16.1%	16.2%	13.1%	16.4%	16.7%	14.3%	14.5%		
Selling, general and administrative expenses	5,292	5,565	5,292	5,588	4,942	5,188	5,686	5,456	4,999	5,284		
Operating income	3,628	3,524	3,707	4,568	4,252	2,040	2,565	3,599	1,455	2,106		
Profit rate	6.1%	5.8%	6.2%	7.2%	7.5%	3.7%	5.1%	6.6%	3.2%	4.1%		
Non-operating income	69	116	164	64	72	130	54	214	356	-70		
Non-operating expenses	554	530	408	427	711	-363	831	333	95	85		
Ordinary income	3,143	3,110	3,463	4,204	3,614	2,533	1,787	3,480	1,715	1,951		
Profit rate	5.3%	5.1%	5.8%	6.7%	6.4%	4.6%	3.5%	6.4%	3.8%	3.8%		
CN Business	579	683	712	1,487	1,153	1,015	1,017	2,079	1,488	1,120		
EC Business	2,563	2,426	2,750	2,717	2,460	1,517	770	1,400	227	831		
Extraordinary income	4	—	—	—	0	—	—	0	0	0		
Extraordinary losses	0	1	32	4	0	1	0	4	0	1		
Net income before income taxes	3,147	3,109	3,430	4,200	3,614	2,531	1,786	3,475	1,715	1,949		
Profit rate	5.3%	5.1%	5.7%	6.7%	6.4%	4.6%	3.5%	6.4%	3.8%	3.8%		
Net income	2,210	2,390	2,544	2,935	2,506	1,811	1,278	3,306	1,240	1,368		
Profit rate	3.7%	3.9%	4.2%	4.6%	4.4%	3.3%	2.5%	6.1%	2.7%	2.7%		
Net income attributable to owners of parent	2,186	2,364	2,519	2,915	2,494	1,810	1,269	3,300	1,217	1,362		
Profit rate	3.7%	3.9%	4.2%	4.6%	4.4%	3.3%	2.5%	6.1%	2.7%	2.7%		

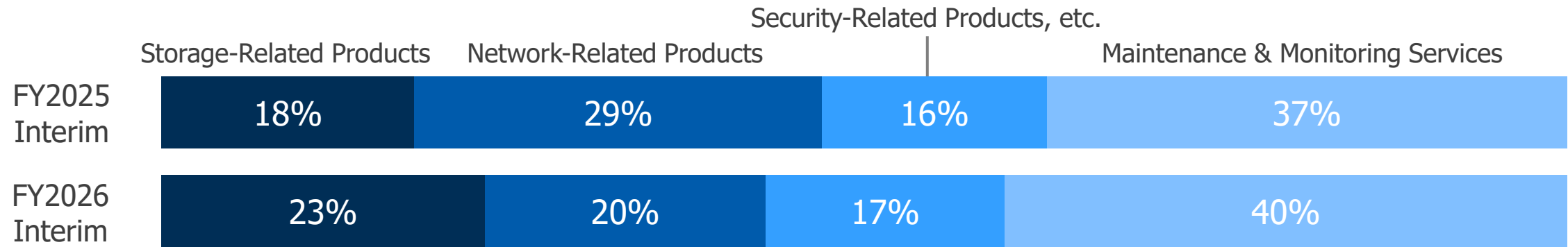
Financial Highlight (2/2)

(Millions of yen)  Connect Beyond

	FY2025													
	1Q		2Q		1 st Half		3Q		4Q		2 nd Half		Full Year	
		Change		Change		Change		Change		Change		Change		Change
Net sales	56,607	-4.1%	55,105	-9.2%	111,712	-6.7%	50,383	-16.1%	54,283	-14.0%	104,666	-15.0%	216,379	-10.9%
CN Business	8,741	23.1%	8,946	23.3%	17,687	23.2%	8,460	28.4%	11,179	-7.1%	19,640	5.4%	37,327	13.2%
EC Business	47,865	-7.8%	46,158	-13.6%	94,024	-10.7%	41,923	-21.6%	43,103	-15.7%	85,026	-18.7%	179,051	-14.7%
Cost of sales	47,411	-5.3%	47,876	-7.2%	95,288	-6.3%	42,131	-17.5%	45,226	-14.6%	87,358	-16.0%	182,646	-11.2%
Gross profit	9,195	3.1%	7,228	-20.5%	16,423	-8.8%	8,252	-8.3%	9,056	-10.8%	17,308	-9.6%	33,732	-9.2%
Selling, general and administrative expenses	4,942	-6.6%	5,188	-6.8%	10,131	-6.7%	5,686	7.4%	5,456	-2.4%	11,143	2.4%	21,274	-2.1%
Operating income	4,252	17.2%	2,040	-42.1%	6,292	-12.0%	2,565	-30.8%	3,599	-21.2%	6,164	-25.5%	12,457	-19.3%
Ordinary income	3,614	15.0%	2,533	-18.5%	6,147	-1.7%	1,787	-48.4%	3,480	-17.2%	5,267	-31.3%	11,415	-18.0%
CN Business	1,153	99.0%	1,015	48.5%	2,168	71.7%	1,017	42.7%	2,079	39.8%	3,097	40.8%	5,266	52.0%
EC Business	2,460	-4.0%	1,517	-37.5%	3,978	-20.3%	770	-72.0%	1,400	-48.5%	2,170	-60.3%	6,149	-41.2%
Net income before income taxes	3,614	14.8%	2,531	-18.6%	6,146	-1.8%	1,786	-47.9%	3,475	-17.2%	5,262	-31.0%	11,408	-17.9%
Net income	2,506	13.4%	1,811	-24.2%	4,318	-6.1%	1,278	-49.8%	3,306	12.6%	4,585	-16.3%	8,904	-11.7%
Net income attributable to owners of parent	2,494	14.1%	1,810	-23.4%	4,305	-5.4%	1,269	-49.6%	3,300	13.2%	4,569	-15.9%	8,874	-11.1%

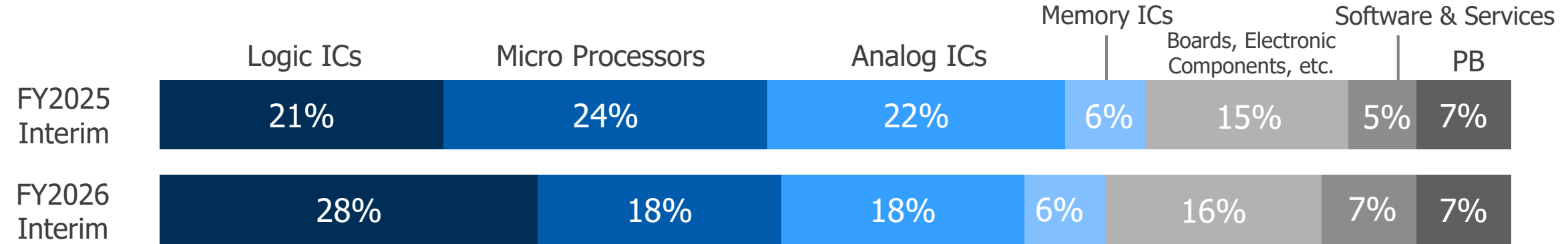
	FY2026													
	1Q		2Q		1 st Half		3Q		4Q		2 nd Half		Full Year	
		Change		Change		Change		Change		Change		Change		Change
Net sales	45,136	-20.3%	51,107	-7.3%	96,244	-13.8%								
CN Business	8,741	0.0%	10,453	16.9%	19,195	8.5%								
EC Business	36,394	-24.0%	40,653	-11.9%	77,048	-18.1%								
Cost of sales	38,681	-18.4%	43,716	-8.7%	82,398	-13.5%								
Gross profit	6,454	-29.8%	7,391	2.2%	13,845	-15.7%								
Selling, general and administrative expenses	4,999	1.1%	5,284	1.8%	10,283	1.5%								
Operating income	1,455	-65.8%	2,106	3.3%	3,561	-43.4%								
Ordinary income	1,715	-52.5%	1,951	-23.0%	3,667	-40.3%								
CN Business	1,488	29.0%	1,120	10.3%	2,608	20.3%								
EC Business	227	-90.8%	831	-45.2%	1,058	-73.4%								
Net income before income taxes	1,715	-52.5%	1,949	-23.0%	3,665	-40.4%								
Net income	1,240	-50.5%	1,368	-24.5%	2,608	-39.6%								
Net income attributable to owners of parent	1,217	-51.2%	1,362	-24.8%	2,580	-40.1%								

CN Business: Sales Component Ratios by Product Category



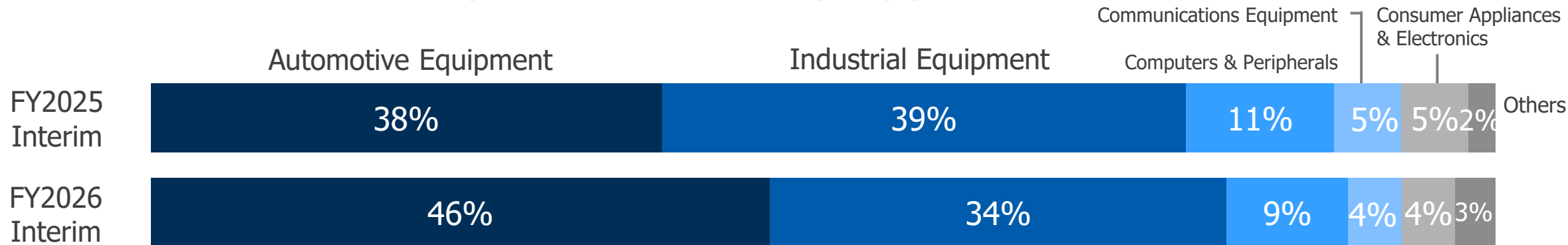
Product	Rate of Change	Main Causes	Main Suppliers
Storage-related products	+40.9%	Sales were strong, including large-scale projects.	Pure Storage
Network-related products	-25.3%	Sales for data centers & cloud business operators decreased.	F5 / Arista Networks Infoblox / Extreme Networks
Security-related products, etc.	+14.3%	Sales for enterprises were performing well.	Netskope SentinelOne Nutanix
Maintenance & monitoring services	+16.9%	Sales of maintenance and monitoring services for storage-related products for telecommunications carriers were strong. Sales of maintenance and monitoring services for network-related products for data center and cloud providers and system integrators were also strong.	TED

EC Business: Sales Component Ratios by Product Category



Product	Rate of Change	Main Causes	Main Suppliers
Logic ICs	+7.6%	Despite impacts such as customer inventory adjustments and reduced demand, sales for automotive equipment increased due to expanded commercial right.	Infineon / NXP / TI / Lattice / ams-OSRAM
Micro processors	-36.7%	Sales declined for industrial equipment, automotive equipment, and computers & peripherals due to customer inventory adjustments and shrinking demand.	Infineon / NXP / TI / Intel
Analog ICs	-31.5%	Sales for automotive equipment and industrial equipment declined due to factors such as customer inventory adjustments and reduced demand.	TI / ams-OSRAM / NXP
Memory ICs	-19.5%	Demand for automotive equipment declined.	Infineon / Everspin
Boards, electronic components, etc.	-13.1%	Sales for automotive equipment increased due to expanded commercial rights. And sales for industrial equipment and computer peripherals decreased.	NXP / ams-OSRAM / Sandisk / Intel
Software & services	+8.2%	Sales of security products for industrial equipment were increasing.	Microsoft / Trellix / DELL
PB	-19.3%	Sales of wafer inspection system and design & manufacturing services declined.	TED / TED Nagasaki

EC Business: Sales Component Ratios by Application



Application	Rate of Change	Main Uses	Sales Trends
Automotive Equipment	-1.0%	Car navigation systems, Automobile instruments, Advanced Driving Assistant systems, Displays, Automobile electronic control units (ECUs), Lithium ion batteries, Automobile inverters	Sales of micro processors and analog ICs declined due to customer inventory adjustments. Sales of logic ICs and electronic components increased due to expanded commercial rights.
Industrial Equipment	-29.9%	Medical and analyzing equipment, Semiconductor production equipment, FA equipment, Industrial robots, Fabricating equipment, Measuring equipment, Control systems, Electrical component mounting equipment, Inverters	Sales of micro processors and analog ICs for industrial equipment such as factory automation and robotics and others declined due to factors including customer inventory adjustments.
Computers & Peripherals	-28.9%	Multifunctional printers, POS systems, Storage / Server, Projectors, PCs and peripheral devices	Sales of micro processors for PC/POS declined. Sales of inspection equipment for printers declined.
Communications Equipment	-28.8%	5G base stations, Optical transmission equipment, Satellite communications equipment, Wireless IP network equipment	Sales of micro processors and logic ICs for communication base stations declined.
Consumer Appliances & Electronics	-23.2%	Electronic musical instruments, Home gaming consoles, Digital cameras, Air conditioners, TVs and HDD recorders, Residential fuel cells	Sales of logic ICs for electronic musical instruments and home appliances declined.

Product Categories

	Category	Main Products	Functions
CN Business	Storage-related products	Flash storage	Connect to and store large volumes of data at high speed
	Network-related products	Network load distribution devices Ethernet switches	Distribute Internet connection loads Switching hubs
	Security-related products, etc.	End points, networks, cloud	Protect computer systems, networks, data, etc. from attacks, damage, and unauthorized access
	Maintenance & monitoring services	Device maintenance services and security monitoring services	
EC Business	Logic ICs	Image processing ICs Communications and network applications ICs ASIC, PLD	ICs with packaged logic circuits, special-purpose ICs made for particular applications, special ICs made according to customer specifications
	Micro processors	CPUs, DSPs	Brains of electronic devices, calculation and control functions
	Analog ICs	Analog ICs	ICs used in common in various applications
	Memory ICs	SRAM, FRAM, MRAM Flash memory	Memory ICs, readable/writable memory products, read-only products
	Boards, electronic components, etc.	Boards, power supplies, optical components	ICs on printed circuit boards, power supplies, products with mounted connectors and other components (boards)
	Software & services	Software, cloud services	Software embedded in industrial equipment for enterprises Provision of subscription services
	PB	Design and mass production contract services, private brand products	Design, development and mass production of boards according to customer specifications Devices for manufacturing industries

Change in Balance of Orders Received

