

The Chip Insider[®]

Trusted Advisor for
semiconductor manufacturing

CMRS Product Modules

The Chip Insider® (TCI)

- Strategy and Tactics
- Equipment
- Emerging Markets
- Weather Report
- TCI Graphics File
- Client Support
 - Access to Analysts
 - Advisories
 - Bullet Proofing
 - Inquiries

ForecastPro

- Forecast Databases
- Driving Forces
- TCI Graphics
 - IC supply and demand
 - Monthly Capacity
- Weather Report
- Client Support
 - Assistance

Equipment Databases

- IC Equipment
 - Forecasts
 - Histories
 - Market Shares
 - Yearly & Quarterly
- Regional Equipment Sales
- Emerging Markets
- Client Support
 - Assistance

The Chip Insider[®]

Strategic and tactical insights

- Trusted advisor to senior semiconductor executives
 - Intelligence to make better decisions faster
- E-mail reports on current issues, trends, strategies, and tactics
 - Edgy & blunt on industry issues
 - Essential perspectives
- Analyst access for detailed discussion & advisory
 - Time for personalized inquiries
 - Leadership, strategy & tactics
 - Brainstorming, bullet proofing your work
 - Marketing communications & financial relations support
- Business Maxims
 - Learn from industry leaders

The Chip Insider[®]

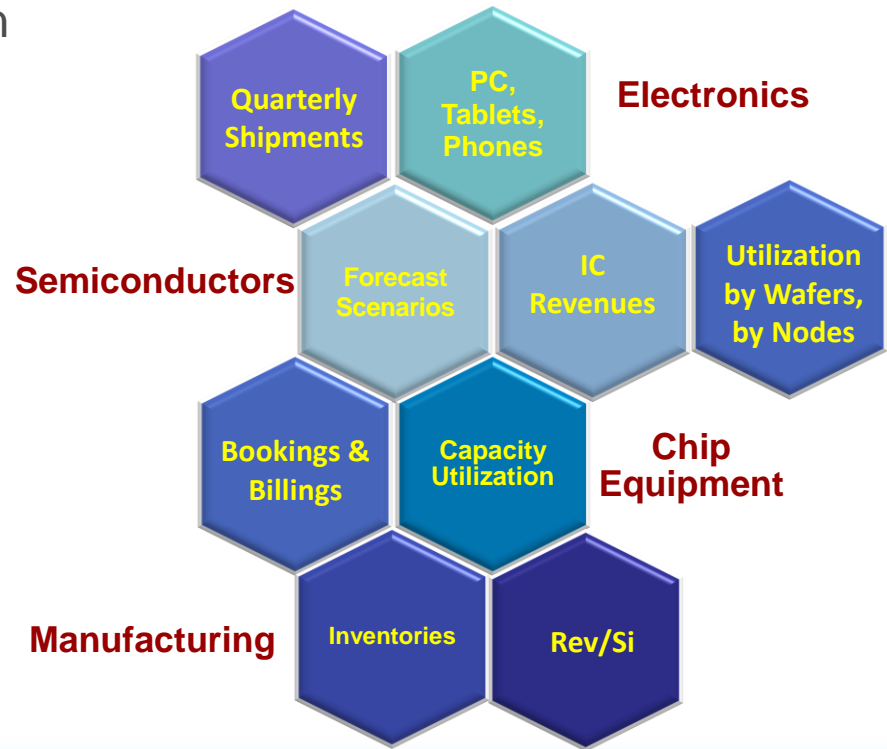
Trusted Advisor for your critical decisions



TCl Graphics

Monthly and weekly snapshot of industry performance

- Main segments affecting the silicon ecosystem
 - Electronics
 - Mobile, PCs
 - Semiconductors
 - Major segments, Capex
 - Equipment
 - Weekly order trends
 - Key Metrics about ecosystem performance
 - Utilization
 - Inventories, Rev/Si



Key Issues & Maxims

- Strategies entering into 450mm manufacturing
- Consolidation:
 - Equipment suppliers
 - Semiconductor suppliers
 - Manufacturing
- Equipment and Semiconductor outlook
- Equipment Trends
 - Market insights
 - Lithography, EUV
 - Competition
- Emerging markets
 - PV Solar, HB-LEDs

- Semiconductor R&D
- Semiconductor Design
- Materials
- Geopolitical views pertaining to semiconductor supply and demand
 - Impact of natural disasters
- Maxims
 - How to apply leadership in high tech business
 - Technology is the fourth dimension of the business
- Maxims applied
 - Practical applications of Maxims

A Preview of The Chip Insider[®]

The Chip Insider
Equipment & Emerging Markets: June 13, 2013



Semiconductor Equipment Outlook

- Business is improving
 - Memory suppliers also expanding capacity
 - ASP-driven upturn, due to capacity constraints in memory
- Foundries continue to invest and add capacity
 - Memory is spending is slowly coming back
- Everything Mobile Drives Demand
- Next Two Year Cycle Starts in 2014
- WFE Trends
- Trends in Test
- Assembly Trends

Supporting Material

- PV Solar Pricing
- LED Pricing
- VLSI Appears Next @

Weather Indicator Instrument Panel

Weather Conditions: Storms Warming Fog Clear Sunny Hot

Climate Trends:

Stocks:

Spot Prices:

IC ASPs:

IC Inventories - OEMs:

Die Banks:

Fab Capacity:

Current:

Planned:

by Node:

by Wafer Size:

Test Capacity:

Assembly Capacity:

Equipment-to-IC Sales

Equipment Orders:

IC Orders:

Equipment Revenues:

CSubs Revenues:

FPD Revenues:

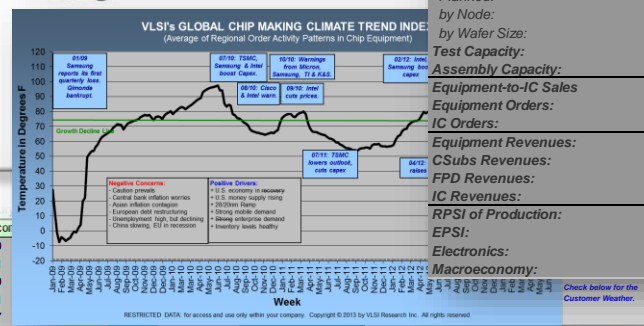
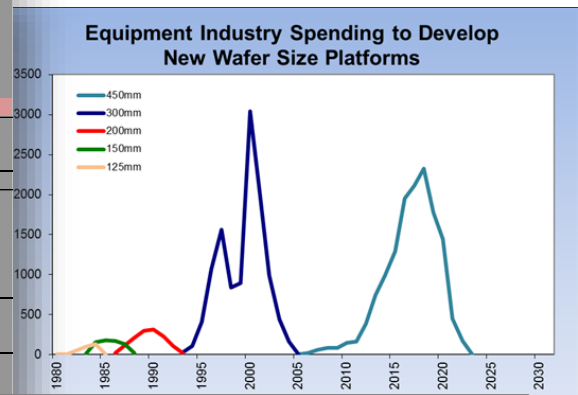
IC Revenues:

RPSI of Production:

EPSt:

Electronics:

Macroeconomy:



Ending	Weather	Cell	Dig Cons	Other	Memory	Subcon															
7/21/2013	57.8	73	55	65	41	70															
7/28/2013	59.2	74	56	67	43	71															
8/4/2013	58.2	72	55	68	41	70															
8/11/2013	58.5	73	54	69	40	71															
8/18/2013	60.7	76	55	70	41	77															
8/25/2013	60.8	75	56	70	42	75	47	0.33	21.6	21.9	1.02	17.3	39.1	2.27	22.21	2.01%	5.69%	10.28%	4.8%	4.8%	4.8%
9/1/2013	63.8	76	56	71	56	74	50	0.33	21.5	21.9	1.02	17.1	39.2	2.29	22.39	2.00%	5.70%	10.03%	4.7%	4.7%	4.7%
9/8/2013	64.2	75	57	71	58	73	51	0.32	22.0	22.1	1.01	17.4	39.7	2.28	23.08	1.88%	5.57%	9.78%	4.4%	4.4%	4.4%
9/15/2013	64.8	75	58	70	60	74	52	0.32	21.6	22.1	1.02	17.1	39.0	2.28	22.09	1.96%	5.54%	9.87%	4.5%	4.5%	4.5%
9/22/2013	65.7	76	59	71	61	74	53	0.32	21.4	21.8	1.02	16.7	38.3	2.28	21.30	2.04%	5.45%	9.80%	4.5%	4.5%	4.5%
9/29/2013	64.5	75	58	69	61	72	52	0.33	21.6	22.4	1.03	16.8	38.3	2.28	21.12	1.94%	5.51%	9.57%	4.6%	4.6%	4.6%
10/6/2013	64.0	74	57	67	60	73	53	0.32	20.7	21.4	1.03	16.3	37.1	2.27	20.23	1.90%	5.57%	9.98%	4.5%	4.5%	4.5%
10/13/2013	63.8	75	56	65	60	74	53	0.32	21.3	21.9	1.03	16.7	37.9	2.27	20.40	1.81%	5.45%	9.50%	4.4%	4.4%	4.4%
10/20/2013	64.5	75	57	63	63	75	54	0.34	20.4	21.1	1.03	15.6	36.7	2.34	19.02	1.79%	5.56%	9.14%	4.4%	4.4%	4.4%
10/27/2013	68.2	79	59	64	72	80	55	0.36	20.9	21.6	1.03	16.3	38.2	2.34	20.01	1.73%	5.47%	8.68%	4.3%	4.3%	4.3%
11/3/2013	71.2	83	60	66	76	83	59	0.38	22.3	22.5	1.01	16.9	38.8	2.29	20.46	1.73%	5.26%	8.47%	4.2%	4.2%	4.2%
11/10/2013	73.5	88	62	67	76	87	61	0.38	22.5	22.9	1.02	17.7	40.0	2.27	20.74	1.70%	5.30%	8.29%	4.1%	4.1%	4.1%
11/17/2013	74.0	88	63	68	75	88	62	0.37	22.7	23.1	1.02	18.2	41.4	2.27	21.35	1.83%	5.19%	8.44%	4.0%	4.0%	4.0%
11/24/2013	74.8	89	64	68	76	89	63	0.37	21.7	22.5	1.04	18.1	41.2	2.28	21.39	1.93%	5.24%	8.49%	4.1%	4.1%	4.1%

The Chip Insider[®] Strategy and Tactics

Moore's Law Golden Anniversary Countdown: Only 107 days left

January 5, 2015 – From the Front Lines: 2014 in Review. WildPhotons: I ask what is the future ...



Focal Points:

- Forecasting is difficult: the pundits *big misses* about 2014

about

Chip Market Research Services (CMRS)

- Marketing, communication, and strategic planning tool for semiconductor industry
- Real-time data on the status of the semiconductor business environment
 - Chip supply & demand, inventories, prices, manufacturing capacity
 - Customer and technical trends in design and manufacturing
- Equipment Markets
 - Market shares, forecasts, demand baselines, emerging market analysis

To order CMRS or get more information, please contact us at
VLSIresearch.com