

The Chip Insider[®]

Trusted Advisor for
semiconductor manufacturing

CMRS Product Modules

The Chip Insider® (TCI)

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

ForecastPro

- Forecasts
 - Macro & Electronics
 - Semis
- Driving Forces
 - Capex
 - Silicon demand
 - Packaging demand
- TCI Graphics - monthly
- Client Support
 - Assistance

Equipment Databases

- IC Equipment
 - Forecasts
 - Histories
 - Market Shares
 - Yearly & Quarterly
- WFE, Test, & Assembly
- Regional sales
- Captive sales
- Client Support
 - Assistance

TCI Graphics

- Weather Report
- Monthly and weekly industry performance
 - Electronics
 - Semi
 - Equipment
- Key Metrics

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



Key Issues & Maxims

- Strategies entering into advanced manufacturing
- Consolidation:
 - Equipment suppliers
 - Semiconductor suppliers
 - Manufacturing
- Equipment and Semiconductor outlook
- Equipment Trends
 - Market insights
 - Lithography, EUV
 - Competition
- New markets and applications

- 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

TCI On Demand

Chip Market Research Services: The Chip Insider®

TCI	The Chip Insider's Graphics File			
Strategy & Tactics 2018 (YTD)	Read Later	01-23-18	Order activity is up and the visibility clear	xlsx pdf Read Later
Strategy & Tactics 2017 (archive)	Read Later	01-09-18	Moving forward...	xlsx pdf Read Later
Strategy & Tactics 2017 (archive, pres.)	Read Later	12-19-17	The ducks are lining up for the New Year	xlsx pdf Read Later
Strategy & Tactics 2016 (archive)	Read Later	12-11-17	Flying into the New Year	xlsx pdf Read Later
Strategy & Tactics 2015 (archive)	Read Later	12-05-17	Thank you for the great memories	xlsx pdf Read Later
Strategy & Tactics 2014 (archive)	Read Later	11-27-17	Christmas is a powerful attractant to business	xlsx pdf Read Later
Equipment Emerging Markets 2018 (YTD)	Read Later			
Equipment Emerging Markets 2017 (archive)	Read Later			
Equipment Emerging Markets 2016 (archive)	Read Later			
Equipment Emerging Markets 2015 (archive)	Read Later			
Equipment Emerging Markets 2014 (archive)	Read Later			

For Questions or Comments please click [here](#).

A Preview of The Chip Insider®

Weather Report: November 20, 20xx



There is plenty to be thankful for this Thanksgiving

- Order activity h
- It's looking very where the visibili
- Despite the Chri largely abated as
- Memory remain tidal wave of rec capital spending
- The CPPI turned drop of the year
 - DRAM flat
 - NAND tun
 - MPUs ros

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Equipment & Emerging Markets: December 14, 20xx



3Q 20xx Equipment Supplier Performance

- Top WFE supp
- WFE grew
- Large supp
- Assembly equi
- Overall bus
- Solid test dem
- Both SOC

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January 12, 20xx – Strategy and Tactics: 20xx in Review.

WildPhotons: Perfection is achieved ...



Focal Points:

Forecasting is difficult

- Everything went right in 20xx
 - o Everything beat, amplifying growth
- The supply chain stack growth curve's tilt
- The memory bubble
 - o The case for believing it's a bubble
 - o The case for believing it's NOT a bubble
- Surprises with a Better than Even Chance of Occurring
 - o As for my 20xx predictions:
 - 4 of 6 came through
 - 1 was mixed
 - 1 wrong

Weekly Gains					
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
Wafer Process:			Test:		
Applied Materials	58.4%	12	Advantest	6.3%	-
ASM International	53.8%	16	Teradyne	64.8%	18
ASML	54.9%	28	Xoerra	28.1%	15
KLA-Tencor	33.5%	14	FormFactor	39.7%	11
Lam Research					
Nanometrics					
Nikon					
Rudolph Technologies					
TEL					
Veeco Instruments					

What Will Carry the Industry Beyond the Tradition of Moore's Law?

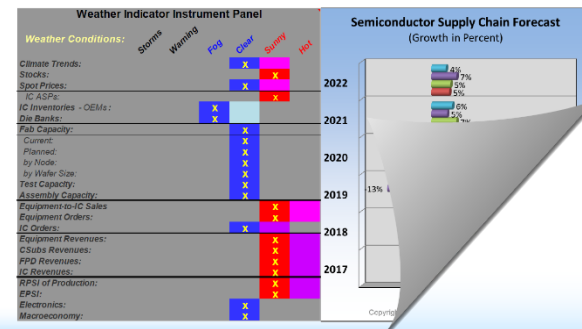


g dan hutcheson

This report has been produced for IEEE 2017 Predicting Computing Industry Summit. It is approved for public release with attribution to VLSI Research.

VLSIresearch ... intelligence to make better decisions faster

It's cooling, but still pointing to the right.



Chip Market Research Services (CMRS)

- Marketing, communication, and strategic planning tool for the 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

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