

Semiconductor WEEK:

July 22, 2022

An overview of results and conclusions from recent reports at TechInsights

Chip Market Research Services

Temperatures are cooling off, but the path is still clear

- Order activity for semiconductor equipment continued to trend down, slipping to 89 degrees
- The rate of decline has moderated in the last two weeks following a steep drop in June
- Capacity Utilization Rates

Semiconductor Analytics

Last Week in the Semiconductor Market:

Semiconductor sales growth continued its sideways path, but is 17% above 2021 levels. The IC weather cooled 0°F last week. Zooming in on Auto ICs this week, the 13-wk MA returned to the high 20% range after dipping in June. TechInsights forecasts A&P will reach \$35B in 2022, with Y/Y growth of 23%.

TechInsights' IC Supply/Demand indices held last week at Saturated, as conditions were mixed between a buyer's & seller's market. More than Moore dropped into a Glut while OSAT returned to Loose. New lockdowns in China are problematic in ascertaining the true status for OSATs. Chip demand is being cooled by inflation and monetary tightening. Capacity expansion and Just-in-Case are driving up supply and inventory.

Customer Satisfaction Survey

White Paper: HANMI – 10 BEST Korean Chip Equipment Supplier

Chip History Center

People: Lithography Panel 2004: When immersion lithography was still in R&D and about to burst out into production. The four historic video interviews from Halloween 2004 cover what the leading lithography suppliers were thinking at the time and what results they were getting from early prototype tools coming to market.

Semiconductor Stocks

- *TechInsights' Semiconductor Stock Indices soared this week as investors are optimistic about this earnings season*
- *Semiconductor Stock Index was led up by SkyWater Technology*
 - *SkyWater Technology was this week's biggest winner*
- *Semiconductor Equipment Stock Index was led up by ASM International*
 - *ASM International earnings came in within expectations while their orders soared to new records*
- *EDA Stock Index surged*
- *Electronics Materials Stock Index was led up by JSR*
- *Hottest Stocks: SkyWater Technology, ASM International, ASML, Onto Innovation, Nikon, and Veeco Instruments*



10 BEST Korean Chip Equipment Supplier

TechInsights Customer Satisfaction Survey 2022



[Click for White Paper](#)


TechInsights



HANMI is awarded 10 BEST and THE BEST awards



- Customers honor HANMI Semiconductor with 4 Stars in 10 BEST *Focused Suppliers of Chip Making Equipment* and THE BEST of *Assembly Equipment Suppliers*
 - earning an outstanding score of 8.31
- 81% of customers said they will return to HANMI for their assembly equipment needs
- Receives its highest rating in *product performance*
- HANMI continues to provide value to customers' needs through its distinguished products and services

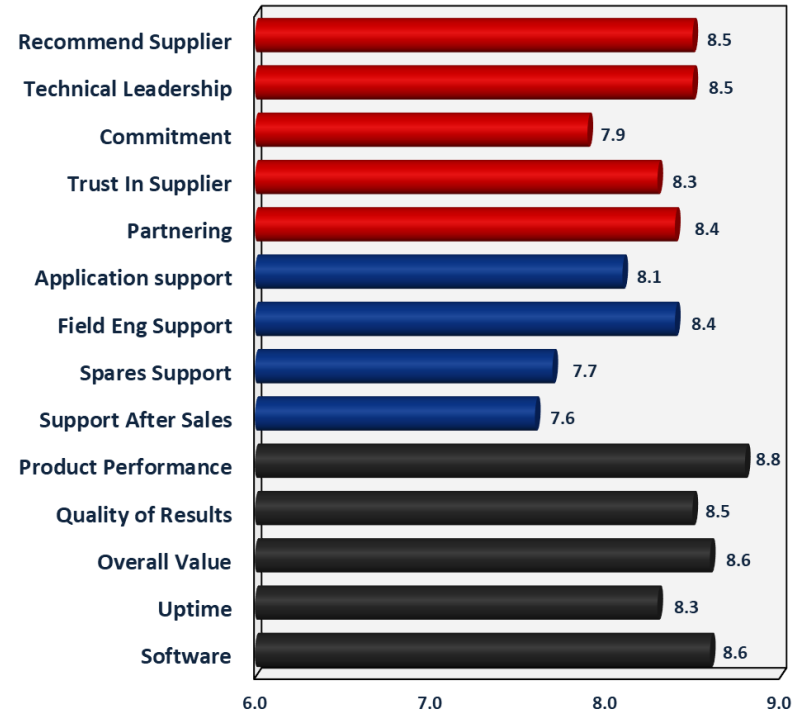
| FOCUSED SUPPLIERS OF CHIP MAKING EQUIPMENT | Rating | TechInsights Stars |
|---|--------|--------------------|
| FormFactor | 9.53 | ★★★★★ |
| Plasma-Therm | 9.35 | ★★★★★ |
| EV Group | 9.03 | ★★★★★ |
| Jiangsu ASIA Electronics | 8.83 | ★★★★★ |
|  | 8.31 | ★★★★ |
| HORIBA | 7.38 | ★★★ |
| VAT | 7.25 | ★★★ |
| Copyright © 2022 TechInsights. All rights reserved. | | |

[Click for White Paper](#)

How Customers Perceive HANMI

- Earns the highest score of all THE BEST *Assembly Equipment Suppliers* in *product performance* and *software*
- Awarded with an average rating of 8.6 in *Product Performance* and 8.3 in *Supplier Performance*
- Highest scores*
 - *Product Performance*
 - *Overall Value*
 - *Software*
 - *Recommend Supplier*
 - *Technical Leadership*
 - *Quality of Results*
 - *Partnering*
 - *Field Engineering Support*

*Listed in order of score, highest to lowest



Copyright © TechInsights Inc. All rights reserved.

[Click for White Paper](#)

TechInsights

The Chip Insider[®]'s Graphics File



July 2022

Temperatures are cooling off, but the path is still clear

- Order activity for semiconductor equipment continued to trend down, slipping to 89 degrees
- The rate of decline has moderated in the last two weeks following a steep drop in June
- The sentiment at SEMICON West was positive
- Equipment manufacturers continue to see a strong demand environment
- TechInsights' Chip Price Performance Index tumbled



This issue contains the latest forecast.

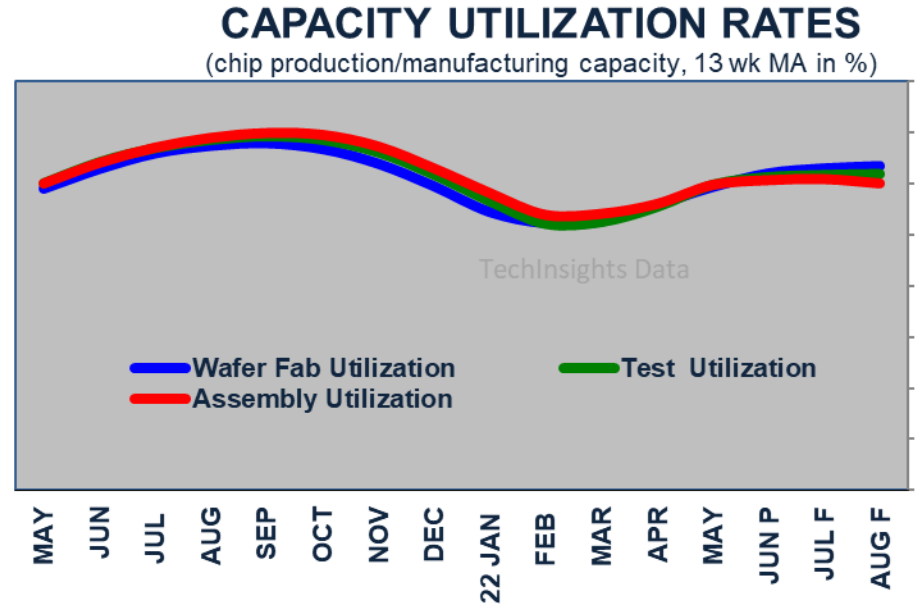
| Forecast as of July 2022: | 2021 | 2022 |
|------------------------------|-----------------|-----------------|
| Semi Equipment (\$B): | \$ 126.6 | \$ 143.1 |
| Sequential Change | 36.6% | 13.0% |
| Capacity Utilization: | 97.2% | 96.5% |
| ICs (\$B): | \$ 492.3 | \$ 555.8 |
| Sequential Change | 27.4% | 12.9% |
| IC Units (BU): | 394.2 | 426.0 |
| Sequential Change | 23.7% | 8.1% |
| Electronics (\$B) : | \$ 2,574 | \$ 2,758 |
| Sequential Change | 18.9% | 7.1% |

The Chip Insider[®] Graphics

Capacity Utilization Rates:

- Utilization rates remain high

Capacity Utilization Rates: chart gives rolling averages for semiconductor wafer fab, test, and assembly



Approved for public release with attribution.
Copyright © TechInsights Inc. All rights reserved.

Insights Interview:

Workforce Development Solutions...

with Ajit Manocha of SEMI



What the conversation is about:

- Labor shortages have become the echo pandemic from the ravages COVID has had on the economy.
- This is no truer than in the semiconductor industry, where Workforce Development has long been on the To-Do lists of many.
- Most industry efforts appear to be more about lobbying others to do something about workforce development.
- It's really hard to do something substantive about it but SEMI is.

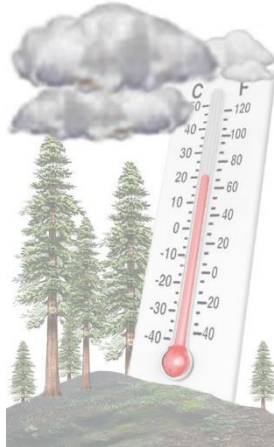
[Click here to watch online](#)

Semiconductor Analytics

Last Week in the Semiconductor Market:

Semiconductor sales growth continued its sideways path, but is 17% above 2021 levels. The IC weather cooled 0°F last week. Zooming in on Auto ICs this week, the 13-wk MA returned to the high 20% range after dipping in June. TechInsights forecasts A&P will reach \$35B in 2022, with Y/Y growth of 23%.

TechInsights' IC Supply/Demand indices held last week at Saturated, as conditions were mixed between a buyer's & seller's market. More than Moore dropped into a Glut while OSAT returned to Loose. New lockdowns in China are problematic in ascertaining the true status for OSATs. Chip demand is being cooled by inflation and monetary tightening. Capacity expansion and Just-in-Case are driving up supply and inventory.



1: Measures Order Activity 2: Measures Pricing Power

W/W: Week-over-Week sequential growth W/Q: Week-over-Quarter W/Y: Year-over-Year

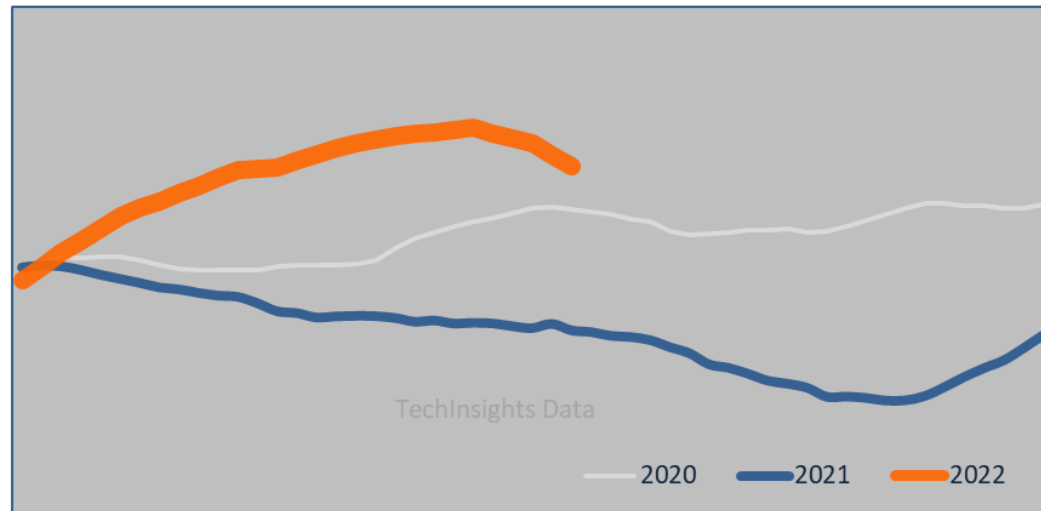
Electronics Retail Pricing Trends:

for PC notebooks Tablets Smartphones Cell phones Digital Cameras Appliances TVs

Electronics' Retail Prices are declining

Electronics Pricing Barometer

indexed 13 week moving average



Source: Semiconductor Analytics

Quarter.Week

Chart approved for public release with attribution.
Copyright © TechInsights Inc. All rights reserved.

Innovation in Memory ...

with Scott DeBoer of Micron
Technology



What the conversation is about:

- Scott DeBoer of Micron Technology has a conversation with Dan Hutcheson about what it takes to innovate in Memory today. Scott leads Micron's global technology development and engineering efforts – from silicon design to high-value system solutions.

[Click here to watch online](#)

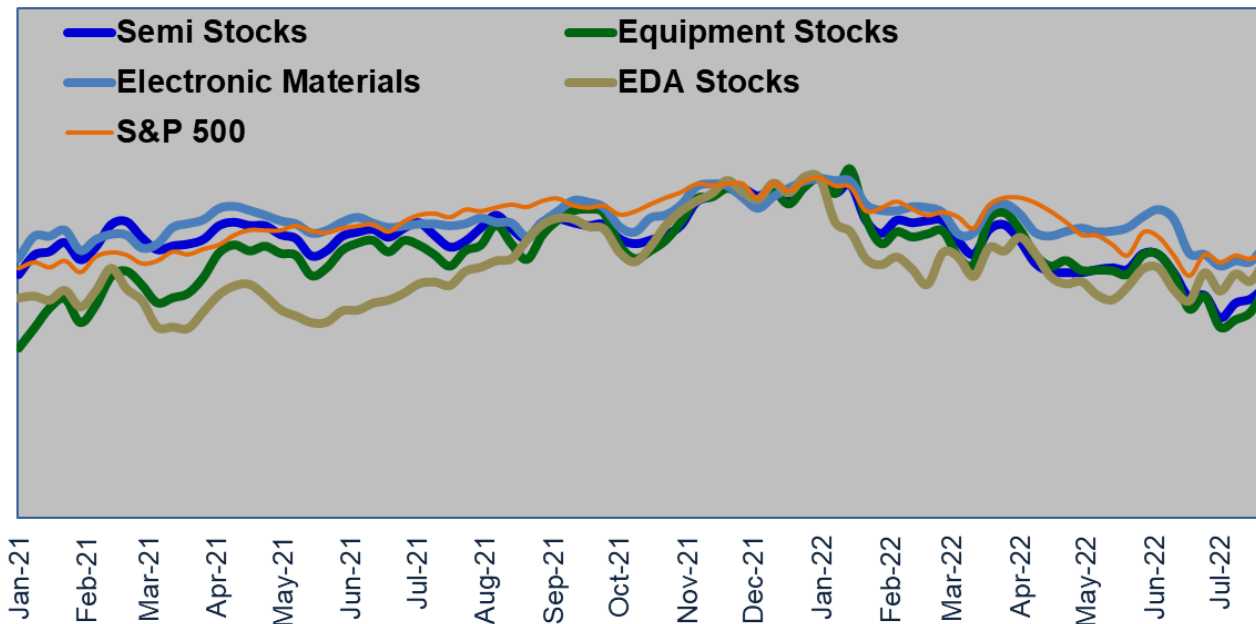
semiStockWEEK:

TechInsights' Semiconductor Stock Indices soared this week as investors are optimistic about this earnings season.



Semiconductor Industry Stock Performance Indices

(Stock Prices Indexed to 100 in last week of 2021)



TechInsights' Stock Indices:

Semiconductors +4.4%
Equipment +9.1%
Electronic Materials +5.7%
EDA +7.5%

Approved for public release with attribution.
Copyright © TechInsights Inc. All rights reserved.



Hans Stork, then Senior Vice President of Silicon Technology Development at Texas Instruments, describes how decision-making processes in a technology development organization yields competitive advantage in this historic 2003 interview. Hans is one of the industry's most transparent visionaries who tells it like it is on multiple topics including the rise of customer involvement in semiconductor technology development, which was a strategic inflection point in its day. Also, covered are rapid ramp strategy, low-power, interaction of process development with design, building of design and system expertise in mobile markets. Issues with copper interconnect and lo-k. Issues of dielectric porosity and device integration. photonics, maskless lithography, and low-k interconnect.

[Decision-making processes in a technology development organization](#)

[The rise of customer involvement in semiconductor technology development](#)

[Photonics and optical interconnects in the early 2000s](#)

[E-beam maskless lithography's role for low-volume semiconductor manufacturing](#)

[Low-k Interconnect Materials in the Early 2000's](#)



Semiconductor Stocks:

Weekly Growth and Forward P/E Ratios by Company

| Weekly Gains | | | 7/22/2022 | | |
|---------------------------|--------------|-------------|----------------------------|--------------|-------------|
| Semiconductor Stocks | Price Change | Forward P/E | Semiconductor Stocks | Price Change | Forward P/E |
| IDM | | | Fab-lite to Fabless | | |
| Intel | 1.5% | 11 | AMD | 8.6% | 16 |
| Micron | -0.4% | 10 | Analog Devices | 3.4% | 16 |
| ON Semiconductor | 6.0% | 11 | Broadcom | 3.7% | 12 |
| Samsung Electronics | 2.2% | - | IBM | -8.3% | 13 |
| SK hynix | 1.3% | | Infineon | 7.1% | 11 |
| STMicroelectronics | 6.1% | 9 | MagnaChip Semiconductor | 5.6% | 11 |
| Western Digital | -0.4% | 5 | MaxLinear | 10.6% | 8 |
| Foundry & OSAT | | | MediaTek | 8.8% | - |
| Amkor | 8.5% | 6 | NVIDIA | 9.9% | 24 |
| ASE | 6.0% | 6 | Panasonic | 2.6% | 9 |
| GLOBALFOUNDRIES | 4.8% | 20 | Qualcomm | 6.5% | 11 |
| JCET | 2.0% | 13 | Silicon Laboratories | 8.1% | 30 |
| SkyWater Technology | 66.7% | - | Skyworks | 5.0% | 8 |
| SMIC | 6.3% | 10 | Texas Instruments | 2.1% | 18 |
| TSMC | 0.8% | 14 | | | |
| UMC | 5.8% | 7 | | | |

Above Avg
Top 4-6
Top 1-3

TechInsights' Semiconductor Stock Index was led up by SkyWater Technology once again. Its stock rocketed up after announcing plans to build a chip facility in Indiana.

IDM +2.3%
Foundry & OSAT +12.6%
Fabless & Fablite +5.3%

AMD^{AMD} Analog Devices^{ADI} Amkor^{AMKR} ASE^{ASX} Broadcom^{AVGO} GLOBALFOUNDRIES^{GFS} IBM^{IBM} Infineon^{IFNNY.PK} Intel^{INTC} JCET^{600584.SS} Micron Technology^{MU} On Semiconductor^{ON} Panasonic^{PC} MagnaChip Semiconductor^{MX} MaxLinear^{MXL} MediaTek^{2454.TW} NVIDIA^{NVDA} Qualcomm^{QCOM} Samsung Electronics^{005930.KS} Silicon Laboratories^{SLAB} SkyWater Technology^{SKYT} Skyworks^{SWKS} SMIC^{SMI} STMicroelectronics^{STM} Texas Instruments^{TXN} TSMC^{TSM} UMC^{UMC} Western Digital^{WDC}

Chip Equipment & Related Stocks:

Weekly Growth and Forward P/E Ratios by Company

| Weekly Gains | | | 7/22/2022 | | |
|-------------------|--------------|-------------|------------------------|--------------|-------------|
| Equipment Stocks | Price Change | Forward P/E | Equipment Stocks | Price Change | Forward P/E |
| Wafer Fab: | | | Test: | | |
| Applied Materials | 7.6% | 11 | Advantest | 5.8% | - |
| ASM International | 19.9% | 17 | Teradyne | 7.2% | 14 |
| ASML | 12.3% | 22 | FormFactor | 5.2% | 18 |
| KLA | 8.5% | 14 | | | |
| Lam Research | 8.6% | 11 | Assembly: | | |
| Onto Innovation | 11.6% | - | BESI | 9.2% | - |
| Nikon | 11.4% | - | Kulicke & Soffa | 7.6% | 7 |
| TEL | 5.1% | - | ASM Pacific Technology | 2.0% | |
| Veeco Instruments | 11.3% | 10 | | | |

Above Avg

Top 4-6

Top 1-3

TechInsights' Semiconductor Equipment Stock Index was led up by ASM International, followed by ASML, Onto Innovation, Nikon, and Veeco Instruments. ASM International earnings came in within expectations while their orders soared to new records.

WFE +10.7%
 Test +6.1%
 Assembly +6.3%

Applied Materials ^{AMAT} Advantest ^{ATEYY}
 ASM International ^{ASMIY}
 ASM Lithography ^{ASML} ASM Pacific ^{0522.HK}
 BE Semiconductor ^{BESIIY.PK}
 FormFactor ^{FORM} KLA ^{KLAC}
 Kulicke & Soffa ^{KLIC} Lam Research ^{LRCX}
 Onto Innovation ^{ONTO} Nikon ⁷⁷³¹ Teradyne
 TER Tokyo Electron Limited ⁸⁰³⁵ Veeco
 VECCO

Electronic Materials Stocks:

Weekly Growth and Forward P/E Ratios by Company

| Weekly Gains | | | 7/22/2022 | | |
|-----------------------------------|--------------|-------------|-----------------------------------|--------------|-------------|
| EDA & Electronic Materials Stocks | Price Change | Forward P/E | EDA & Electronic Materials Stocks | Price Change | Forward P/E |
| EDA | | | DNP | 5.3% | – |
| Cadence | 6.8% | 36 | DuPont de Nemours | 5.0% | 5 |
| Synopsys | 7.6% | 32 | JSR | 10.0% | – |
| Ansys | 8.0% | 28 | Shin-Etsu | 3.9% | – |
| Electronic Materials | | | SOITEC | 4.9% | – |
| BASF | 4.4% | 2 | Tokyo Ohka | 6.2% | – |
| Entegris | 6.2% | 20 | | | |

Above Avg
Top 4-6
Top 1-3

TechInsights' EDA Stock Index surged.

TechInsights' Electronic Materials Stock Index was led up by JSR.

Ansys, Inc. ^{ANSS} BASF ^{BASFY}
 Entegris ^{ENTG} Cadence ^{CDNS} DNP ⁷⁹¹²
 DuPont ^{DD} JSR ⁴¹⁸⁵ Shin-Etsu ⁴⁰⁶³
 SOITEC ^{SOI.PA} Synopsys ^{SNPS} Tokyo
 Ohka ⁴¹⁸⁶

| The Prior Week's Close | TechInsights' Indices of Chip Industry Stocks | | | | Weekly Growth | | | | Companies Up | Max Growth | Companies Down | Min Growth | Range of Growth | S&P 500 | S&P 500 Growth |
|------------------------|---|------------------|------------------|------------|---------------|------------------|------------------|------------|--------------|------------|----------------|------------|-----------------|---------|----------------|
| | Semi Stocks | Equipment Stocks | Materials Stocks | EDA Stocks | Semi Stocks | Equipment Stocks | Materials Stocks | EDA Stocks | | | | | | | |
| 17-Dec-21 | 94.7 | 93.8 | 97.7 | 96.5 | -2.9% | -3.2% | 2.1% | -2.3% | 12 | 25.6% | -43 | -15.6% | 41.2% | 96.9 | -1.9% |
| 24-Dec-21 | 98.6 | 97.7 | 99.3 | 100.2 | 4.1% | 4.2% | 1.7% | 3.8% | 50 | 13.8% | -6 | -2.8% | 16.6% | 99.2 | 2.3% |
| 31-Dec-21 | 100.0 | 100.0 | 100.0 | 100.0 | 1.5% | 2.3% | 0.7% | -0.2% | 44 | 8.1% | -11 | -2.7% | 10.8% | 100.0 | 0.9% |
| 07-Jan-22 | 96.6 | 96.3 | 99.4 | 89.7 | -3.4% | -3.7% | -0.6% | -10.3% | 10 | 7.4% | -45 | -17.5% | 24.9% | 98.1 | -1.9% |
| 14-Jan-22 | 98.5 | 102.0 | 99.3 | 87.4 | 2.0% | 5.9% | -0.1% | -2.5% | 36 | 23.7% | -20 | -4.9% | 28.6% | 97.8 | -0.3% |
| 21-Jan-22 | 90.1 | 90.4 | 93.8 | 81.0 | -8.5% | -11.4% | -5.6% | -7.3% | 3 | 5.1% | -53 | -20.3% | 25.4% | 92.3 | -5.7% |
| 28-Jan-22 | 87.1 | 84.5 | 92.4 | 79.7 | -3.4% | -6.6% | -1.5% | -1.7% | 11 | 5.0% | -45 | -21.8% | 26.8% | 93.0 | 0.8% |
| 04-Feb-22 | 90.2 | 87.3 | 92.3 | 81.5 | 3.5% | 3.3% | -0.1% | 2.3% | 41 | 17.5% | -13 | -4.3% | 21.8% | 94.4 | 1.6% |
| 11-Feb-22 | 89.6 | 86.1 | 93.2 | 78.7 | -0.7% | -1.4% | 1.0% | -3.4% | 20 | 10.6% | -33 | -8.9% | 19.5% | 92.7 | -1.8% |
| 18-Feb-22 | 90.1 | 86.8 | 93.0 | 75.0 | 0.6% | 0.8% | -0.2% | -4.7% | 28 | 12.2% | -26 | -7.0% | 19.2% | 91.2 | -1.6% |
| 25-Feb-22 | 90.1 | 87.5 | 91.9 | 82.5 | 0.0% | 0.8% | -1.3% | 9.9% | 30 | 14.7% | -25 | -9.5% | 24.2% | 92.0 | 0.8% |
| 04-Mar-22 | 85.3 | 81.4 | 86.8 | 81.5 | -5.3% | -6.9% | -5.5% | -1.2% | 7 | 6.4% | -48 | -18.6% | 25.0% | 90.8 | -1.3% |
| 11-Mar-22 | 82.1 | 79.7 | 87.1 | 76.9 | -3.7% | -2.2% | 0.3% | -5.7% | 9 | 9.7% | -45 | -11.1% | 20.8% | 88.2 | -2.9% |
| 18-Mar-22 | 87.9 | 90.3 | 92.7 | 83.7 | 7.1% | 13.3% | 6.5% | 8.8% | 53 | 31.3% | -2 | -5.9% | 37.2% | 93.6 | 6.2% |
| 25-Mar-22 | 89.1 | 91.8 | 94.0 | 82.9 | 1.3% | 1.7% | 1.3% | -0.9% | 36 | 9.2% | -16 | -5.5% | 14.7% | 95.3 | 1.8% |
| 01-Apr-22 | 85.4 | 87.8 | 91.5 | 86.1 | -4.2% | -4.3% | -2.6% | 3.9% | 5 | 5.0% | -50 | -23.1% | 28.1% | 95.4 | 0.1% |
| 08-Apr-22 | 80.1 | 81.9 | 87.1 | 82.3 | -6.2% | -6.8% | -4.8% | -4.4% | 2 | 5.5% | -53 | -17.6% | 23.1% | 94.2 | -1.3% |
| 15-Apr-22 | 78.1 | 79.2 | 86.4 | 76.9 | -2.5% | -3.3% | -0.9% | -6.6% | 6 | 4.2% | -49 | -10.9% | 15.1% | 92.2 | -2.1% |
| 22-Apr-22 | 77.8 | 80.5 | 87.4 | 75.2 | -0.3% | 1.6% | 1.3% | -2.2% | 30 | 9.3% | -25 | -18.8% | 28.1% | 89.6 | -2.8% |
| 29-Apr-22 | 77.8 | 78.2 | 88.2 | 75.7 | 0.0% | -2.9% | 0.9% | 0.7% | 22 | 21.1% | -32 | -14.9% | 36.0% | 86.7 | -3.3% |
| 06-May-22 | 78.6 | 78.3 | 87.3 | 72.6 | 0.9% | 0.1% | -1.0% | -4.1% | 30 | 12.0% | -25 | -11.7% | 23.7% | 86.5 | -0.2% |
| 13-May-22 | 79.0 | 78.1 | 87.5 | 71.4 | 0.5% | -0.1% | 0.2% | -1.6% | 28 | 8.2% | -25 | -10.0% | 18.2% | 84.4 | -2.4% |
| 20-May-22 | 78.6 | 77.3 | 88.3 | 74.5 | -0.5% | -1.1% | 1.0% | 4.3% | 22 | 17.9% | -30 | -7.7% | 25.6% | 81.9 | -3.0% |
| 27-May-22 | 82.3 | 81.9 | 90.9 | 78.7 | 4.8% | 6.0% | 2.9% | 5.6% | 48 | 30.3% | -7 | -7.8% | 38.1% | 87.2 | 6.6% |
| 03-Jun-22 | 82.1 | 82.0 | 92.6 | 78.9 | -0.3% | 0.1% | 1.9% | 0.3% | 29 | 7.7% | -26 | -4.6% | 12.3% | 86.2 | -1.2% |
| 10-Jun-22 | 77.8 | 77.3 | 90.3 | 73.8 | -5.2% | -5.7% | -2.5% | -6.5% | 6 | 9.7% | -49 | -11.9% | 21.6% | 81.8 | -5.1% |
| 17-Jun-22 | 72.0 | 69.1 | 82.3 | 71.2 | -7.5% | -10.6% | -8.9% | -3.6% | 2 | 4.0% | -53 | -17.3% | 21.3% | 77.1 | -5.8% |
| 24-Jun-22 | 72.5 | 72.1 | 82.0 | 77.8 | 0.8% | 4.3% | -0.3% | 9.3% | 41 | 12.8% | -14 | -19.4% | 32.2% | 82.1 | 6.4% |
| 01-Jul-22 | 67.2 | 64.9 | 79.3 | 73.5 | -7.3% | -10.1% | -3.3% | -5.6% | 3 | 6.1% | -52 | -20.1% | 26.2% | 80.3 | -2.2% |
| 08-Jul-22 | 70.7 | 66.6 | 80.5 | 77.5 | 5.2% | 2.7% | 1.5% | 5.5% | 47 | 20.5% | -7 | -4.8% | 25.3% | 81.8 | 1.9% |
| 15-Jul-22 | 71.7 | 68.5 | 80.3 | 75.8 | 1.4% | 2.8% | -0.2% | -2.2% | 32 | 10.1% | -21 | -9.1% | 19.2% | 81.1 | -0.9% |
| 22-Jul-22 | 74.9 | 74.7 | 84.9 | 81.5 | 4.4% | 9.1% | 5.7% | 7.5% | 52 | 66.7% | -3 | -8.3% | 75.0% | 83.1 | 2.5% |

Links to Conference Call Transcripts

July 22nd

[Taiwan Semiconductor Manufacturing Company Limited \(TSM\) CEO C. C. Wei on Q2 2022 Results - Earnings Call Transcript](#)

[Telefonaktiebolaget LM Ericsson \(ERIC\) CEO Börje Ekholm on Q2 2022 Results - Earnings Call Transcript](#)

[Aehr Test Systems \(AEHR\) CEO Gayn Erickson on Q4 2022 Results - Earnings Call Transcript](#)

[ASML Holding NV \(ASML\) CEO Peter Wennink on Q2 2022 Results - Earnings Call Transcript](#)

[ASMPT Ltd \(ASMVF\) CEO Robin Ng on Q2 2022 Results - Earnings Call Transcript](#)

[Nokia Oyj \(NOK\) CEO Pekka Lundmark on Q2 2022 Results - Earnings Call Transcript](#)

[ASM International NV \(ASMIY\) CEO Benjamin Loh on Q2 2022 Results - Earnings Call Transcript](#)

[BE Semiconductor Industries N.V. \(BESIJ\) CEO Richard Blickman on Q2 2022 Results - Earnings Call Transcript](#)

July 8th and before

[Micron Technology, Inc. \(MU\) CEO Sanjay Mehrotra on Q3 2022 Results - Earnings Call Transcript](#)

[Honeywell International Inc.'s \(HON\) Management Presents at Leadership Webcast Series - Innovations in Sustainable Buildings \(Transcript\)](#)

[ASML Holding N.V. \(ASML\) Management presents at Goldman Sachs Global Semiconductor Virtual Conference \(Transcript\)](#)

[Cisco Systems, Inc.'s \(CSCO\) Management Presents at Nasdaq Investor Conference \(Transcript\)](#)

[NXP Semiconductors N.V. \(NXPI\) CEO Kurt Sievers Presents at Jefferies and Nasdaq Conference Presentation \(Transcript\)](#)

[ON Semiconductor Corporation's \(ON\) Management Presents at BofA Securities 2022 Global Technology Conference \(Transcript\)](#)

[Qualcomm, Inc. \(QCOM\) Presents at Bank of America 2022 Global Technology Conference](#)

[Western Digital Corp. \(WDC\) Presents at BofA Securities 2022 Global Technology Conference \(Transcript\)](#)

[DuPont de Nemours, Inc. \(DD\) CEO Ed Breen Presents at Deutsche Bank's 13th Annual Global Materials Conference \(Transcript\)](#)

Links to Conference Call Transcripts

[Intel Corporation's \(INTC\) Management Presents at Bank of America Securities Global Technology Brokers Conference \(Transcript\)](#)

[HP Inc's \(HPQ\) CEO Enrique Lores on Cowen 50th Annual Technology, Media & Telecom Conference \(Transcript\)](#)

[International Business Machines Corporation's \(IBM\) CEO Arvind Krishna Presents at Bernstein 38th Annual Strategic Decisions Conference \(Transcript\)](#)

[American Superconductor Corporation \(AMSC\) CEO Daniel McGahn on Q4 2021 Results - Earnings Call Transcript](#)

[Texas Instruments Incorporated's \(TXN\) CEO Rich Templeton Presents at Bernstein 38th Annual Strategic Decisions Conference \(Transcript\)](#)

[HP Inc.'s \(HPQ\) CEO Enrique Lores at Bernstein's 38th Annual Strategic Decisions Conference \(Transcript\)](#)

[QUALCOMM Incorporated's \(QCOM\) CEO Cristiano Amon Presents at Bernstein 38th Annual Strategic Decisions Brokers Conference \(Transcript\)](#)

[Lam Research Corporation \(LRCX\) CEO Tim Archer Presents at Bernstein 38th Annual Strategic Decisions Conference \(Transcript\)](#)

[Broadcom Inc. \(AVGO\) CEO Hock Tan on Q2 2022 Results and VMware Acquisition \(Transcript\)](#)

[HP Inc. \(HPQ\) CEO Enrique Lores on Q2 2022 Results - Earnings Call Transcript](#)

[NVIDIA Corporation \(NVDA\) CEO Jensen Huang On Q1 2023 Results - Earnings Call Transcript](#)

[Applied Materials, Inc. \(AMAT\) CEO Gary Dickerson on Q2 2022 Results - Earnings Call Transcript](#)

[Synopsys, Inc. \(SNPS\) CEO Aart de Geus on Q2 2022 Results - Earnings Call Transcript](#)

[Analog Devices, Inc. \(ADI\) CEO Vincent Roche on Q2 2022 Results - Earnings Call Transcript](#)

[Camtek Ltd. \(CAMT\) CEO Rafi Amit on Q1 2022 Results - Earnings Call Transcript](#)

[GlobalFoundries Inc.'s \(GFS\) CEO Thomas Caulfield on Q1 2022 Results - Earnings Call Transcript](#)

Links to Conference Call Transcripts

[Microchip Technology Incorporated \(MCHP\) CEO Ganesh Moorthy on Q4 2022 Results - Earnings Call Transcript](#)

[Veeco Instruments Inc. \(VECO\) CEO Bill Miller on Q1 2022 Results - Earnings Call Transcript](#)

[Kulicke and Soffa Industries' \(KLIC\) CEO Fusen Chen on Q2 2022 Results - Earnings Call Transcript](#)

[Axcelis Technologies, Inc. \(ACLS\) CEO Mary Puma on Q1 2022 Results - Earnings Call Transcript](#)

[Advanced Energy Industries, Inc. \(AEIS\) CEO Stephen Kelley on Q1 2022 Results - Earnings Call Transcript](#)

[Qorvo, Inc. \(QRVO\) CEO Bob Bruggeworth on Q4 2022 Results - Earnings Call Transcript](#)

[Magnachip Semiconductor Corporation \(MX\) CEO YJ Kim on Q1 2022 Results - Earnings Call Transcript](#)

[SkyWater Technology, Inc. \(SKYT\) CEO Thomas Sonderman on Q1 2022 Results - Earnings Call Transcript](#)

[Lattice Semiconductor Corporation \(LSCC\) CEO Jim Anderson on Q1 2022 Results - Earnings Call Transcript](#)

[Onto Innovation's \(ONTO\) CEO Michael Plisinski on Q1 2022 Results - Earnings Call Transcript](#)

[Advanced Micro Devices, Inc.'s \(AMD\) CEO Dr. Lisa Su on Q1 2022 Results - Earnings Call Transcript](#)

[Skyworks Solutions, Inc. \(SWKS\) CEO Liam Griffin on Q2 2022 Results - Earnings Call Transcript](#)

[Cirrus Logic, Inc. \(CRUS\) CEO John Forsyth on Q4 2022 Results - Earnings Call Transcript](#)

[ams-OSRAM AG \(AMSSY\) CEO Alex Everke on Q1 2022 Results - Earnings Call Transcript](#)

[Vishay Intertechnology, Inc. \(VSH\) CEO Gerald Paul on Q1 2022 Results - Earnings Call Transcript](#)

[NXP Semiconductors N.V. \(NXPI\) CEO Kurt Sievers on Q1 2022 Results - Earnings Call Transcript](#)

[DuPont de Nemours, Inc. \(DD\) CEO Ed Breen on Q1 2022 Results - Earnings Call Transcript](#)

[Cabot Corporation \(CBT\) CEO Sean Keohane on Q2 2022 Results - Earnings Call Transcript](#)

TechInsights recent uploads

Chip Market Research Services Uploads:

ForecastPro Module:

- TCI Graphics – V22.07
- Advanced Packaging – V22.07
- Electronics & Macroeconomy – V22.07
- Diffusion Rates and Utilization – V22.07
- Silicon Demand – V22.07
- Long-Term Semi and Eqpt Forecast – V22.06
- Packaging Demand – V22.06
- CapEx Distribution – V22.06
- Semiconductor Forecast – V22.06

Equipment Database Module:

- Scanner & Stepper Shipments – V22.06
- IC Equipment Forecast:
 - Yearly – V22.05
- WFE by Applications – V22.05
- WFE Equipment Market Shares:
 - Yearly – V22.05
 - Quarterly – V22.05

Customer Satisfaction Survey Uploads:

- [2022 CSS Databases](#)
- 2022 Survey Documents

Critical Subsystems Uploads:

- Critical Subsystems Forecasts – V22.05
- Device Forecast Summary – V22.05
- Manufacturing Equipment Forecasts – V22.05
- Substrate Processing Equipment Shipments – V22.05
- Substrate Processing Equipment Installed Base – V22.05
- Chamber Shipments – V22.05
- Supplier Shares – V22.03

Test Connectivity Reports:

- Test and Burn-In Socket Report : V21.04
- Probe Card Report: V21.04
- Device Interface Board Report: V20.05

Terms and Conditions, Notices, and Disclaimers, etc.

By accepting this report, opening it, or using it you are agreeing to these terms. This report contains valuable data, intellectual property, and trade secrets developed or acquired by TechInsights. You have a limited license to hold these materials but do not become the owner of any material. The materials provided are protected by copyright, trade secret, and trademark law. This presentation has been approved by TechInsights for public release with attribution. The information in the materials may be used by you on a limited basis in your own documents provided that those documents are not-for-sale; TechInsights' name, brand, or trademarks are not used to endorse a product or company for sales purposes; TechInsights is clearly referred to as the source of such information; and you obtain written approval prior to use.

This report is provided on an "AS IS," "WHERE IS," "WHERE AVAILABLE," "WITH ALL FAULTS" basis. TechInsights does not warrant these materials or the information provided therein, either expressly or impliedly, for any particular purpose and TechInsights specifically disclaims any express or implied warranties, including but not limited to, any express or implied warranties of TITLE, ACCURACY, NON-INFRINGEMENT, MERCHANTABILITY or FITNESS FOR ANY PARTICULAR PURPOSE OR USE.

The sources of the information in this report include numerous individual reports, memos and bulletins from various segments of the industry, annual reports, financial reports, interviews, questionnaires, surveys, technical symposia, trade journals, technical journals and individual assessments by knowledgeable company or industry representatives as well as our own analysis and judgment. Some companies are more cooperative about providing information than others and some companies decline to provide or validate the accuracy of any information. Although the information provided is obtained or compiled from sources TechInsights believes to be reliable given the oftentimes difficult circumstances under which it is collected, TechInsights cannot and does not warrant or guarantee the accuracy, validity, truthfulness, timeliness, or completeness of any information or data made available to you for any particular purpose. In no event will TechInsights be liable to you or any third party, whether in contract, tort or under any other legal theory, for any direct, indirect, special, consequential or incidental damages, or any other damages of any kind even if TechInsights has been advised of the possibility thereof.

We receive letters and e-mails on current topics covered in our services and/or reports that are of interest to our subscribers, as well as comments on our reports. We value that subscriber input and like to use it. By submitting such material to us, unless you tell us specifically not to publish it, or except to the extent that you give us an embargo date before which you instruct us not to publish it, you authorize us to publish and republish it in any form or medium, to edit it for style and length, and to comment upon or criticize it and to publish others' comments or criticisms concerning it, as the case may be.

This report may contain information concerning stocks that is obtained from the opinions of industry analysts. Quoted past results are not necessarily indicative of future performance. None of the information should be seen as a recommendation to buy or sell any securities. We are not stock analysts or investment advisors. You should contact a registered investment advisor as to the nature, potential, value or suitability of any particular investment action. No information provided is investment advice and any such information is just an opinion and is not tailored to the investment needs of any specific person. Certain statements in this report, other than statements of historical fact, and other written or oral statements made by TechInsights may be forward-looking. In some cases, you can identify forward-looking statements by terminology such as "may", "will", "should", "expects", "intends", "plans", "anticipates", "believes", "thinks", "estimates", "seeks", "predicts", "potential", and similar expressions. Although TechInsights believes that these statements are based on reasonable assumptions, they are subject to numerous factors, risks and uncertainties that could cause actual results and outcomes to be materially different from those stated or projected. Those factors, among others, could cause actual results and outcomes to differ materially from the results and outcomes stated or projected in, or implied by, the forward-looking statements. You should understand that forward-looking statements are not guarantees of results or outcomes. New risks and uncertainties arise from time to time, and TechInsights can not predict those events or how they may affect you, the reader. TechInsights Inc does not have any intention or obligation to update forward-looking statements after the date of this report.

No part of this report may be used in any legal proceedings nor may any of these materials or the information contained therein be disclosed to any third party, including investors or affiliated firms belonging to investors, outside directors or to your affiliated companies, or reproduced or transmitted to any third party, in any form or by any means – mechanical, electronic, photocopying, duplication, microfilming, videotape, verbally or otherwise – without the prior written permission of TechInsights.

The Chip Insider® and the CSS 10 BEST logo are registered trademarks of TechInsights Inc. All other trademarks, service marks, and logos are the property of their respective owners.