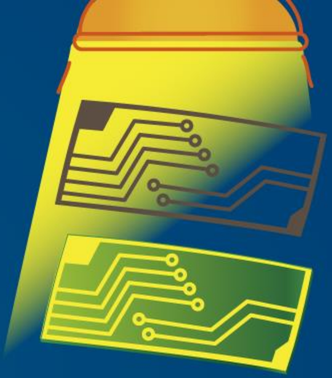
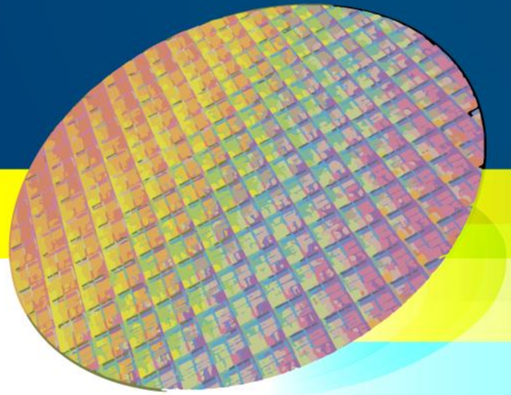


c sun

志聖法人說明會 2467.TT

Investor Conference



Andy Huang, Co-head

Venue: Taiwan Stock Exchange Taipei 101
November 26th, 2020

免責聲明

This presentation contains some forward-looking statements that are subject to substantial risks and uncertainties. Typically, these statements contain words such as “anticipate” , “believe” , “could” , “estimate” , “expect” , “intend” , “plan” , “forecast” ,” project” , “predict” , “potential” , “continue” , “may” , “should” , “will” , and “would” or similar words. You should consider these forward-looking statements carefully because such statements are only our expectations or projections about future events, and actual results may differ materially from those expressed or implied by such statements. The forward-looking statements in this presentation include, but are not limited to, growth rates for various markets estimated by third party sources, future products and technology development, widespread market acceptance of the hosted delivery model, future revenue growth and profitability. You should be cautioned that the forward-looking statements are no guarantee of our future performance. The forward-looking statements contained in this presentation are made only as of the date of this presentation and we undertake no obligation to update the forward-looking statements to reflect subsequent events or circumstances, except as required by law.

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議程

- **Growth Opportunities & Product Development**
- **Q&A**

Growth Opportunities&
Product Development

Growth Opportunities & Product Development

-G2C Alliance(C SUN、GPM、GMM)

Advantages Of Strategic Alliances

-2019-2021 Operating Results Growth Opportunities :

- **Advanced Packaging(SEMI)**
- **Flat Panel Display (FPD)**
- **Printed Circuit Board(PCB)**

2467
c sun
志聖

tcF
創峰

5443
GPM
均豪

6640
GMM
均華

UTRON
祁昌

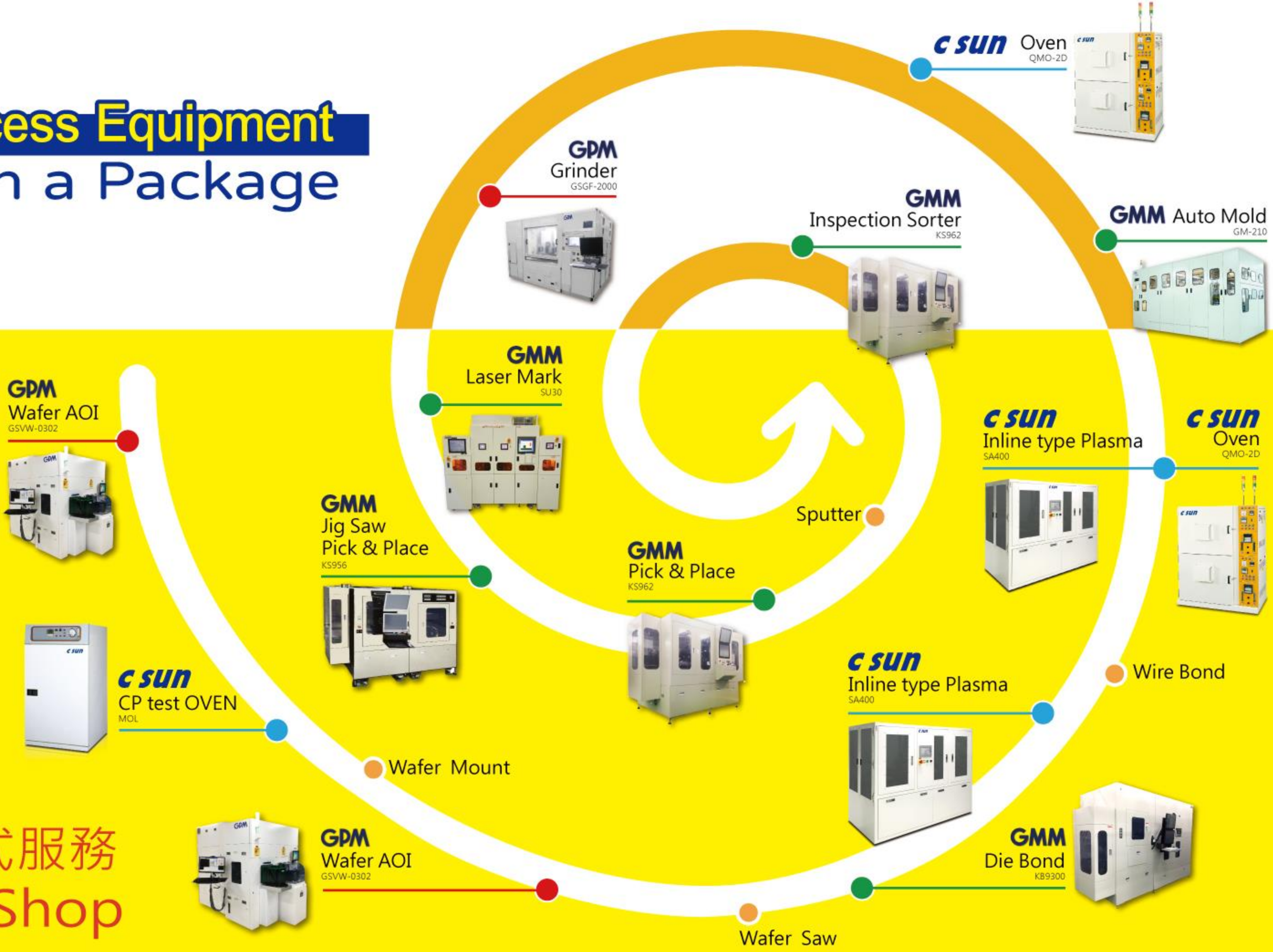
- Each partner own different core technologies and deeply rooted in electronic industry.
- Can integrate partner’s resources to cater customer's need swiftly.
- 33% of Actiance’s employees are R&m.
- **1,618**, RD members **529.** (529/1618)

合力共創 同行致遠 G2C Go Go Champion Great to Customers

SiP Process Equipment

System in a Package

系統級封裝



GPM Wafer AOI GSVW-0302

c sun CP test OVEN MOL

Wafer Mount

GPM Wafer AOI GSVW-0302

Wafer Saw

GMM Die Bond KB9300

c sun Inline type Plasma SA400

Wire Bond

c sun Inline type Plasma SA400

c sun Oven QMO-2D

GMM Auto Mold GM-210

c sun Oven QMO-2D

GPM Grinder GSGF-2000

GMM Laser Mark SU30

GMM Jig Saw Pick & Place KS956

GMM Pick & Place KS962

Sputter

GMM Inspection Sorter KS962

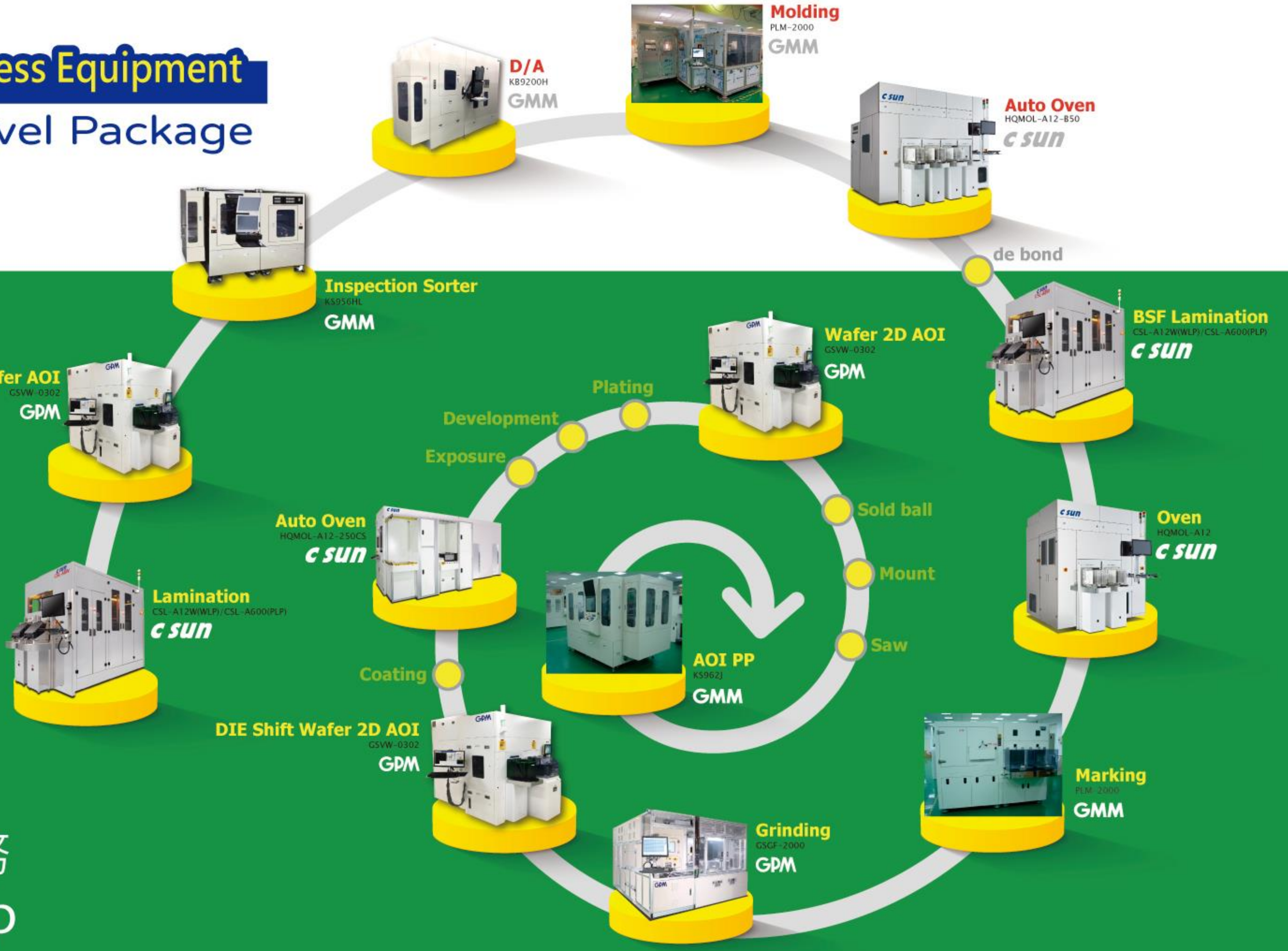
G2C 一站式服務

One Stop Shop

Fan Out Process Equipment

Fan Out Wafer Level Package

扇出型封裝

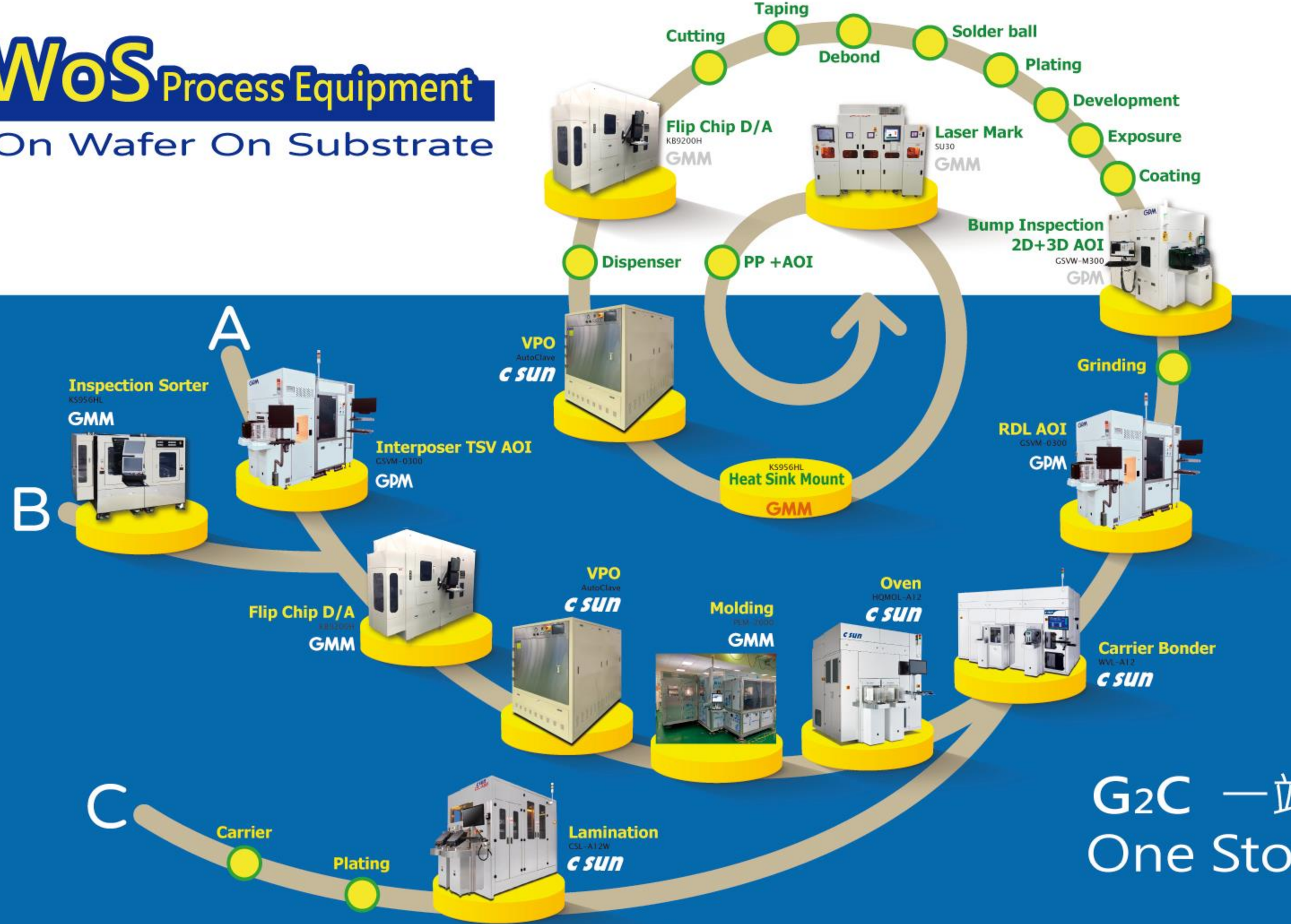


G2C 一站式服務

One Stop Shop

CoWoS Process Equipment

Chip On Wafer On Substrate



G2C 一站式服務

One Stop Shop

2020~2021 Semiconductor Opportunities

Trend and market development

- The development of advanced packaging technologies spur the growth of 5G and AIoT silicons.
- The demand of silicons for 5G, AI and Autonomous car.
- The trend of hereto-integration of technologies is undergoing and the growth of the advanced packaging sector is speeding up.
- CSUN and G2C alliance have manufacturing bases cross the Strait and ready to integrate for the new reality

兩岸半導體產業競爭概況

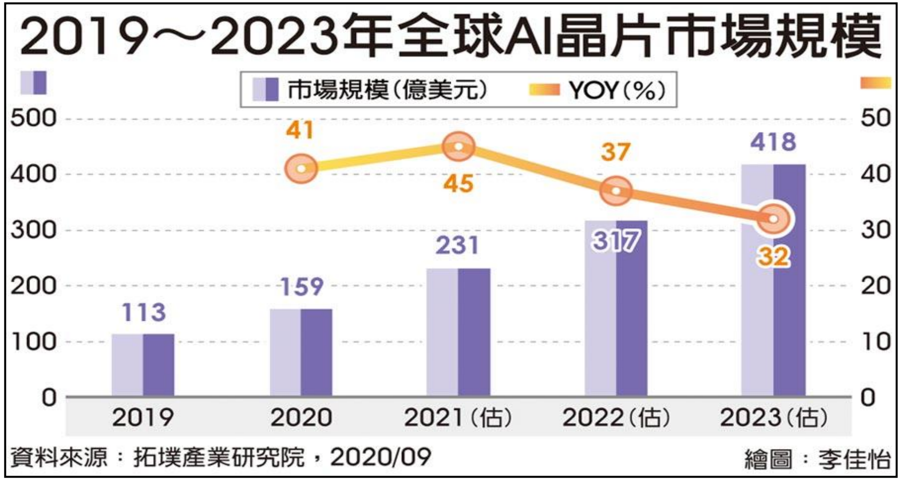
陸廠	產業鏈	台廠
展訊、海思、思立微、銳迪科、中興通訊、瑞芯微、全志、科格、思必科等	IC設計	聯發科、瑞昱、F-敦泰、義隆、聯詠、晶豪科、F-昂寶、F-譜瑞、群聯、立錡等
中芯國際	晶圓代工	台積電、世界先進、聯電
江陰長電、海太半導體、南通富士通微電子、晶方、天水華天	封測	日月光、矽品、京元電、台星科、菱生、矽格、南茂、力成、久元、頎邦

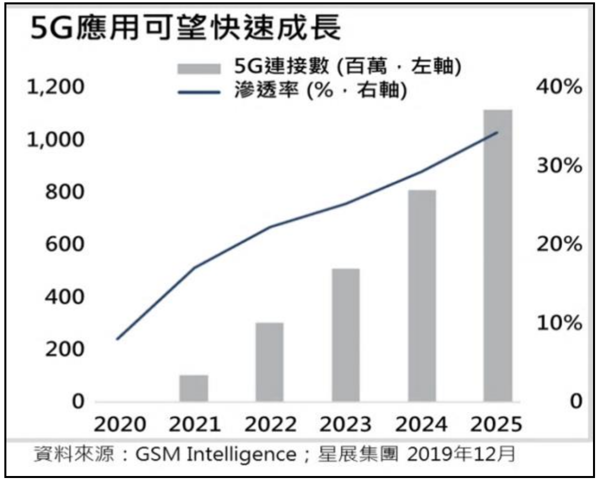
資料來源：採訪整理　謝佳雯／製表　經濟日報

2020~2021 Semiconductor Opportunities

Trends/ market development

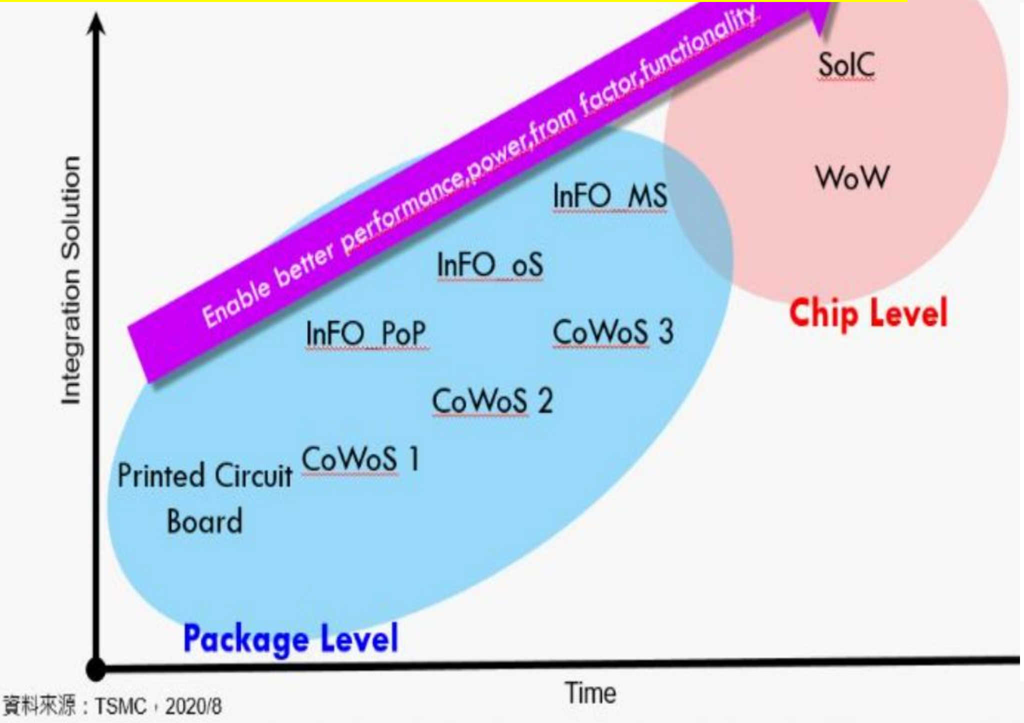
- The development of advanced packaging technologies spur the growth of 5G and AIoT silicons.
- The demand of silicons for 5G, AI and Autonomous cars is clear sky.
- COF packaging is in shortage as driver IC bumps into production bottlenecks.



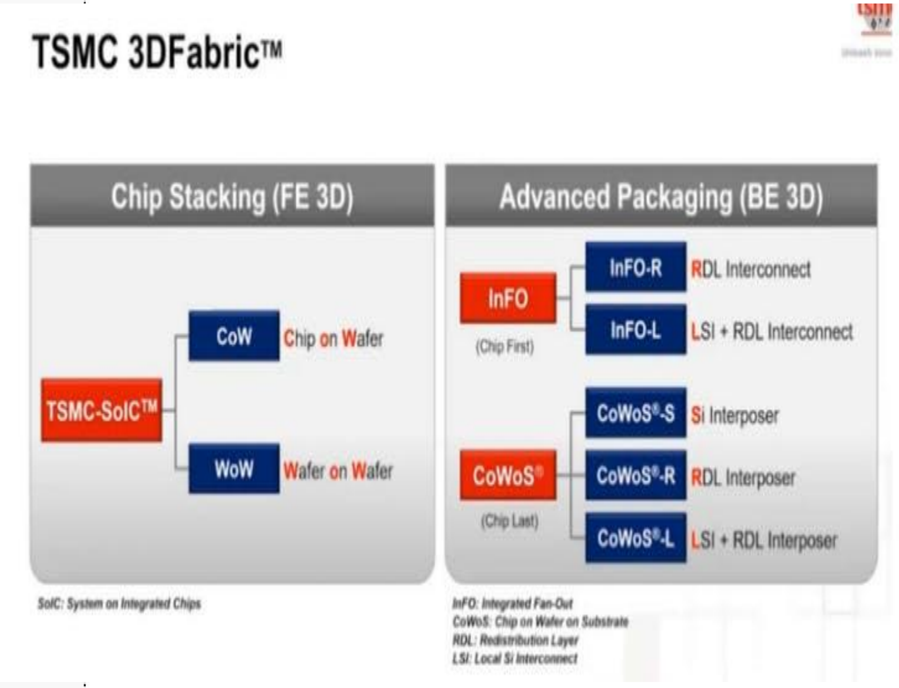


2020~2021 Advanced Packaging Technology Trend.

Advanced packaging technologies are moving to chip level – TSMC is the bellwether



資料來源：TSMC，2020/8

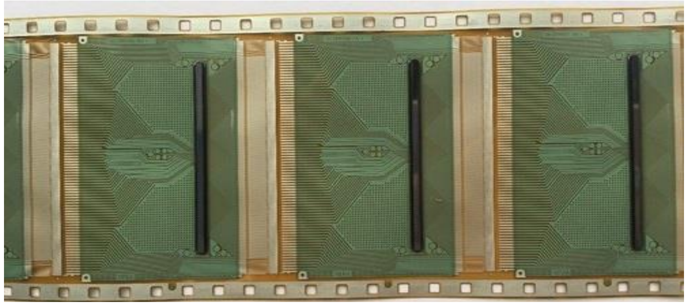


SoIC: System on Integrated Chips

InFO: Integrated Fan-Out
CoWoS: Chip on Wafer on Substrate
RDL: Redistribution Layer
LSI: Local Si Interconnect

COF Industrial Application-Floating R2R (Roll to Roll)Oven

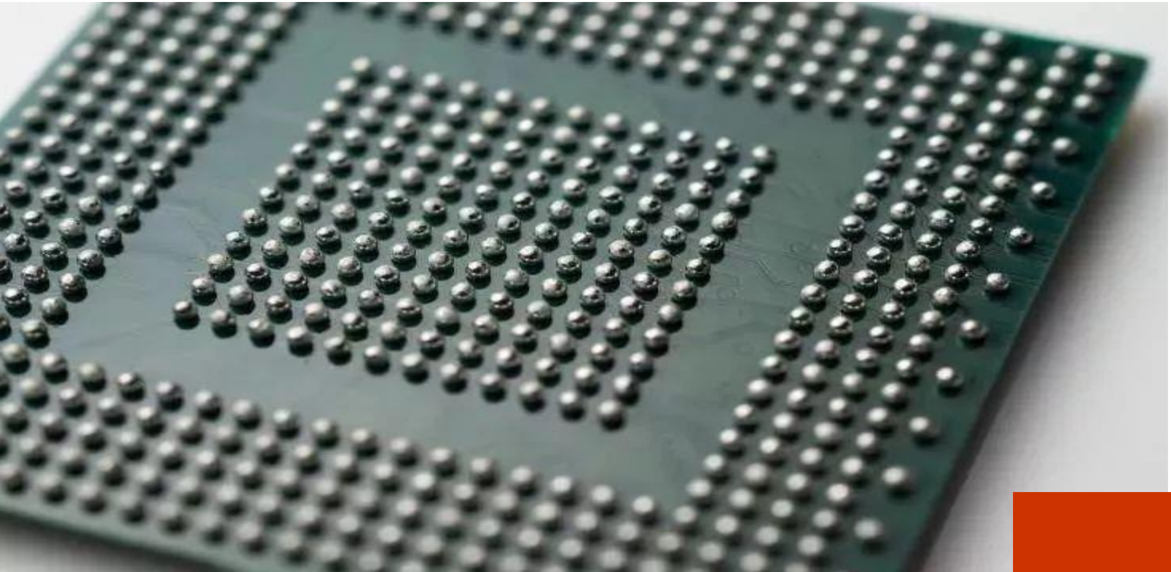
- Fully automated non contact type R2R oven has been moved in customer in China in Q1 2020 and repeat order is received.
- Applications: COF, FPCB, Flex panel display and flex-electronics.



Non-Contacted Roll to Roll Automated Oven

3D Packaging & AutoClave Process- VPO(Vacuum Pressure Oven)

- For chip on wafer and u bump de-bubbling.
- Delivered to packaging big names.
- VPO connecting with OHT is certified by big name DRAM manufacturer in multi stacking process.



Vacuum Pressure Oven

5G RF Module

RF Module Integration Trend: Power Amplifier / Filter Integration.

Wafer-form Auto Roller Laminator

Auto Mylar Peeler

WLP / PLP Advanced Packaging Equipment

- RDL Fan-Out Package process vacuum lamination and Automated Oven Line.
- Wafer vacuum lamination equipment was prepared prior to mass production in T company and started placing repeat orders, for the SoW process base line.
- Burn in Auto Oven has been passed the Mainland DRAM factory verification, and new projects are currently under negotiation.

Wafer –Form Vacuum Laminator

Burn in AUTO OVEN

AI & AIoT Chips

- The production scale of 2.5D TSV advanced packaging expands with the application of AI chips, and continues to increase volume.
- As 3D TSV enters into the mass production stage, the specifications nearing to its requirement and production scale continue to grow. It is estimated to have a double-digit growth in demand for the equipment within 5 years.

Auto oven

High clean ring-spoke furnace tube.

Carrier Bonder

2020~2021 PCB Technology & Opportunity

- Prompt plant construction for IC Carrier and HDI Board
- 5G Servo Board
- Mass Production for Mini LED Base.

Fast Plant construction for IC Carrier and HDI Board

- IC Substrate/Substrate Type and HDI High-End Packaging Equipment.
- Demand for ABF process equipment continues to increase.

Ultra-thin board high-end laminating machine

Multi-chamber vacuum laminating line (ABF)

ABF Mylar Peeler Machine

5G Servo Board

- Significant increase in demand for 5G base stations and cloud server servo boards .
- Actively expanding the market for LCP

Fully Auto Exposure System

RTR Auto Exposure Machine

Roll to Roll Auto Laminator

Mini LED Circuit Base Mass Production

- The massive backlighting conversion of smart phones to mini LEDs, has tremendously increase the demand.

Auto Vacuum Laminating Line

Auto Roller Laminating Machine

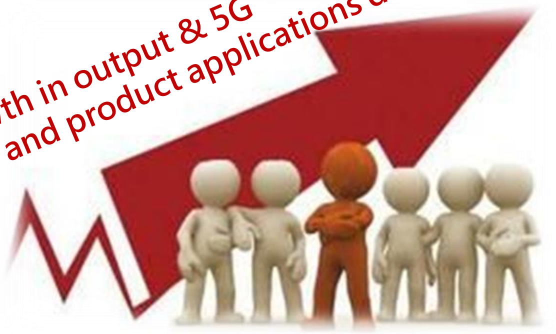
Auto Single-Sided Peeling machine

TCF 創峰

TOP CREATION

Prime Proven Technology in the industry covering

- High Frequency and Speed for 5G Communication
- High reliable automotive electronics
- Market for thin and compact FPC
- Expansion and Transformation of Industry 4.0



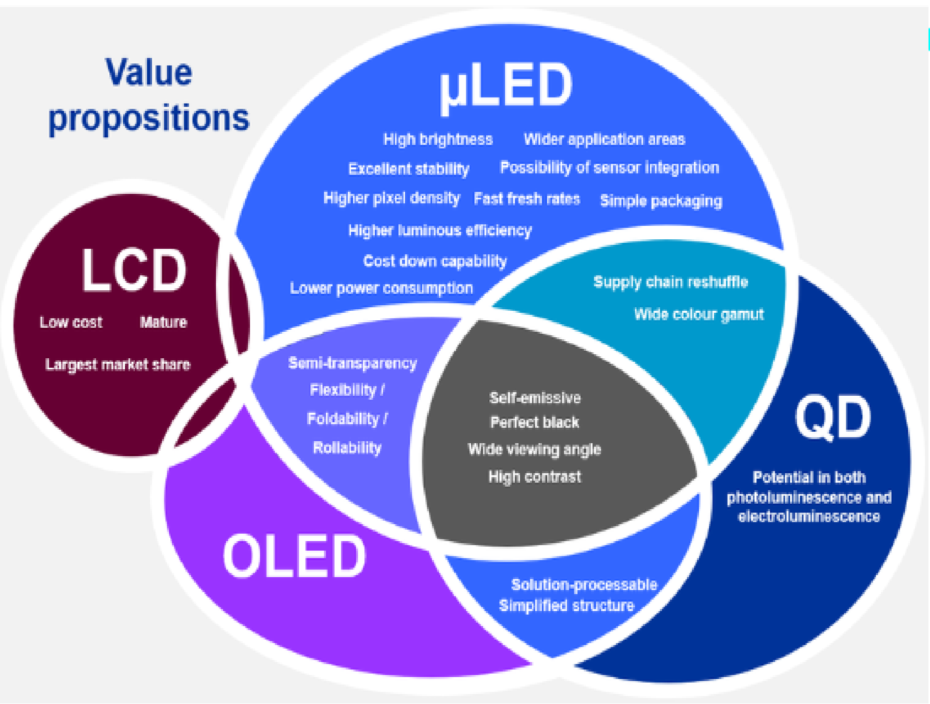
Multiple growth in output & 5G construction and product applications drive.

IC Substrate Ultra-Thin Board Equipment Promotion

- Optimize equipment and commercial market promotion

2020~2021 FPD Industry overview and opportunities

- Mainland Customer G10.5、G8.6 TFT/OLED slows down in plant construction.
- Large-scale applications of high-end automotive modules (3D)
- Mini LED/Micro LED manufacturing process.
- Gaming Panel Monitor demand promotes requirement of high-end processes.



Value propositions of various display technologies. Source: IDTechEx

Car Panel Oven, Curing & Lamination

- Demand for Taiwan's automotive panels expand and modification of Taiwan's automotive panels continues to increase.
- There are special line order from cars manufacturers. Q2, orders from I-company on car panel module automation line and Q3 H-company car panel aging line.
- 2020/Q4 lamination technology is introduced into the automotive panel laminating process.

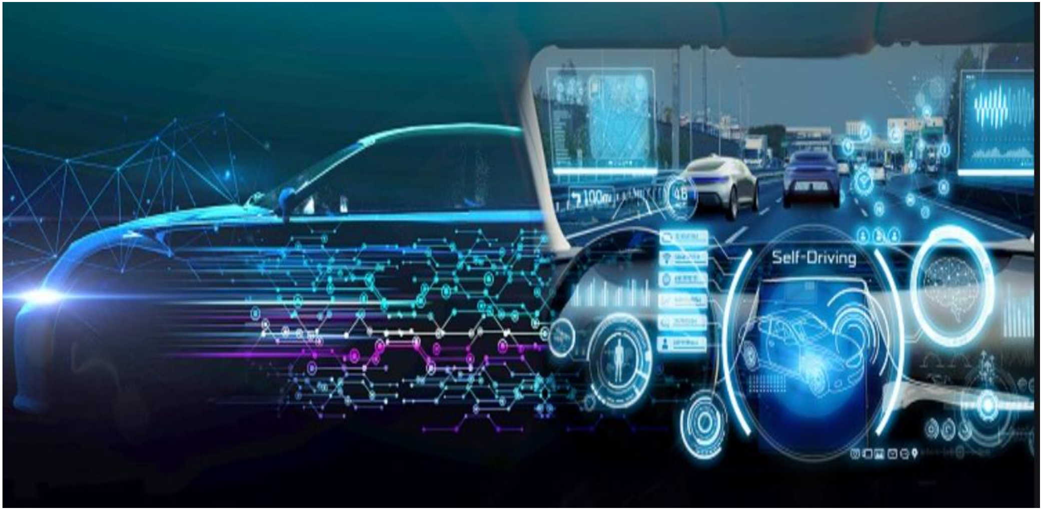
Panel Curing Process Line

Panel Film Line

3D Curved Protective Glass for car

- High-End Protective Glass Anti-glare and Anti-fingerprint layer baking line for car panel.
- Delivered to Japanese glass factory A company.

  Mass production for verification in Q3
- Negotiating co-operation with major China manufactures



Mini /Micro LED Application

- Mini LED backlight applications will gradually be used in high-end panels
- Micro LED experimental lines are successively being introduced to gear up for mass production.
- The glass backplane process has managed to introduce Oven, UV, and Plasma equipment for production line applications.
- Have received an order from a major company in Q2, for applying plasma to mini LED cleaning and glue removal equipment.
- Q4 Micro LED RD line

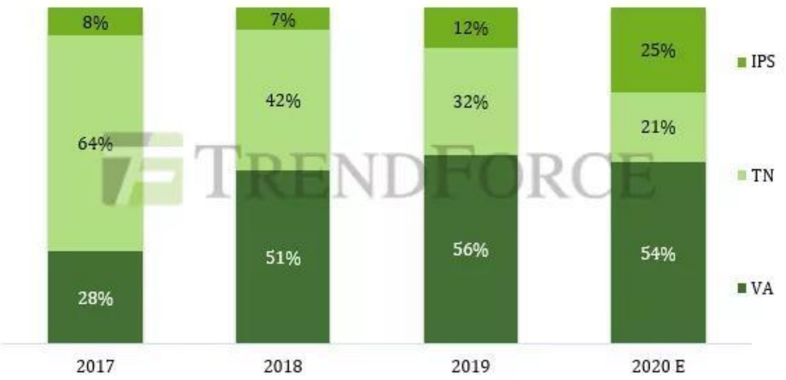
Continuous Demand in Gaming Monitor

- In Y2020, Gaming LCD shipments is forecasted to be 12.2 million units.
- There is a 37% growth compared with Y2019.
- The continuous increase in IPS and VA Technologies, as result a demand for new equipment.

年度	2020年		2024年		年複合成長率（%）
產品	出貨量（萬台）	ASP（美元）	出貨量（萬台）	ASP（美元）	
電競桌機	1,480	699	1,580	671	1.6
電競螢幕	1,240	348	1,600	341	6.4
電競筆電	2,230	967	3,020	955	7.9
總量	4,960	–	6,190	–	5.7

資料來源：IDC，2020/9　整理：翁毓嵐

图一、2017年~2020年电竞液晶显示器面板类型比例



Source: TrendForce, Jul. 2020

Q4/2020 Outlook

- The G2C platform creates and provides equipment integration advantages.
- Follow up on advanced packaging capital expenditures with the foundry company T.
- Keeping up with the capital expenditures with advanced packaging of OEM T company.
- System-in-package applications are widely used and continue to cultivate the capital expenditures of major packaging in A and C Company.
- IC substrates and mini LED applications continues to expand, and heavy investment from Taiwan-funded factories.
- Increase servo boards in HDI and capital expenditures on equipments are high.
- The Mainland G10.5 and G8.6 plants continues to build.
- The large size high-end vehicle modules has led to the demand for dedicated production process from car manufacturers.

Thank You