

Semiconductor WEEK:

June 17, 2022

An overview of results and conclusions from recent reports at TechInsights

Chip Market Research Services

Temperatures are cooling as more clouds roll in

- Order activity for semiconductor equipment tumbled nearly seven points in the second week of June as caution abounds among chipmakers
- IC Inventory Levels

Semiconductor Analytics

Last Week in the Semiconductor Market:

Semiconductor sales growth clipped 2021 levels last week with 2% W/Q growth. The IC weather cooled 4°F. Zooming in on Auto IC growth this week, the 13-wk MA continues to hold in the mid-20% range. It's the fastest growth market, forecast to finish 2022 at around +23% Y/Y reaching \$35B.

TechInsights' IC Supply/Demand indices loosened for the week, as IDM, Foundry, and Analog & Power slipped out of Tight conditions. More Moore Foundry dipped to Loose, while DRAM held at Saturated levels. NAND, More than Moore Foundry, and OSAT remained Tight. Auto ICs are still in a Shortage.

Electronics' Retail Prices are rolling over

Customer Satisfaction Survey

White Paper: EV Group's Tenth Consecutive Triple Crown Win

Chip History Center

Organizations: Inside Intel's Microprocessor's covers a pictorial and spec history from their first, the 4004, through their Centrino™ P4 with Hyper threading.

How the SIA got started is a video interview with the legendary **Wilf Corrigan** who was there when this soon-to-be-great organization got started.

The Chip Insider

Strategy and Tactics: Memory Lithography and Product Strategy. Consistent Development Cadence results from solid Probability Management.

Semiconductor Stocks

- *TechInsights' Semiconductor Stock Indices all plummeted to new yearly lows along with the market*
- *Semiconductor Stock Index sunk*
- *Semiconductor Equipment Stock Index plunged*
- *EDA Stock Index fell*
- *Electronics Materials Stock Index plummeted*
 - *DNP was this week's biggest winner*
- *Hottest Stocks: DNP, JCET, IBM, CMC Materials, Panasonic, Silicon Laboratories, and Synopsys*

TechInsights



Tenth Consecutive Triple Crown Win

TechInsights Customer Satisfaction Survey 2022



[Click for White Paper](#)

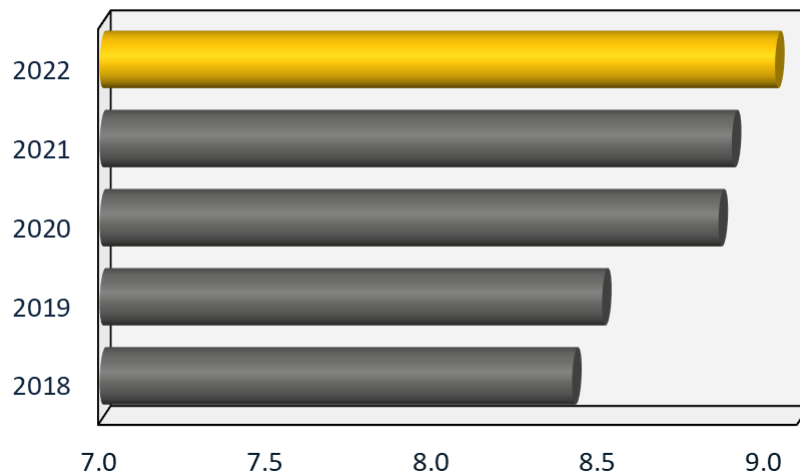
TechInsights



EV Group Awarded 10 BEST Supplier

- EV Group, the industry-leading wafer-bonder supplier, earns its first 5 Star rating for 10 BEST *Focused Suppliers of Chip Making Equipment*
 - with an outstanding score of 9.03
 - wins all 3 awards for the 10th consecutive year
- EV Group improved its rating for the fifth consecutive year
 - their worldwide commitment to customer satisfaction is centered on providing on-demand quality service that customers and partners expect

EV Group's 10 BEST Award History



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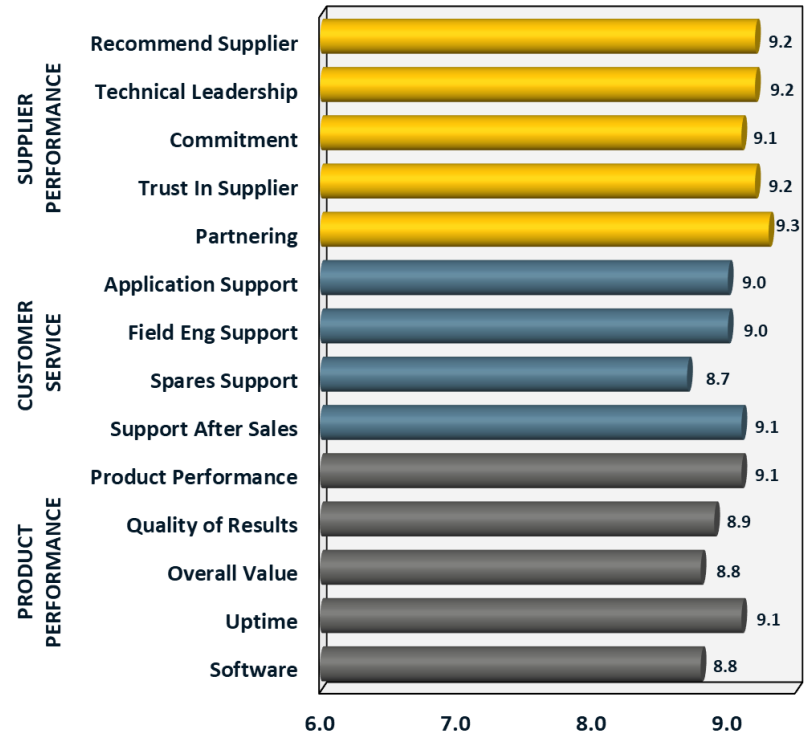
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How Customers Perceive EV Group

- EV Group receives a 9.0 and above in 10 categories
 - earning an excellent average rating of 9.2 in *Supplier Performance*
- Increases ratings in 12 categories
 - *uptime* up 40 basis points
 - *product performance* up 30 basis points
 - *application support, field engineering support, support after sales, and overall value* up 20 basis points
 - *recommend supplier, commitment, trust in supplier, partnering, quality of results, and software* up 10 basis points
- Highest scores*
 - *Partnering*
 - *Recommend Supplier*
 - *Technical Leadership*
 - *Trust In Supplier*

*Listed in order of score, highest to lowest



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The Chip Insider[®]'s Graphics File



May 2022

Temperatures are cooling as more clouds roll in



- Order activity for semiconductor equipment tumbled nearly seven points in the second week of June as caution abounds among chipmakers
- Overall activity is still hot as near-term fundamentals for equipment suppliers remain strong
- TechInsights' Chip Price Performance Index is warning again

Forecast as of May 2022:	2021	2022
Semi Equipment (\$B):	\$ 126.6	\$ 152.4
Sequential Change	36.6%	20.3%
Capacity Utilization:	97.2%	96.9%
ICs (\$B):	\$ 492.3	\$ 571.7
Sequential Change	27.4%	16.1%
IC Units (BU):	394.2	439.0
Sequential Change	23.7%	11.4%
Electronics (\$B) :	\$ 2,574	\$ 2,758
Sequential Change	18.9%	7.1%

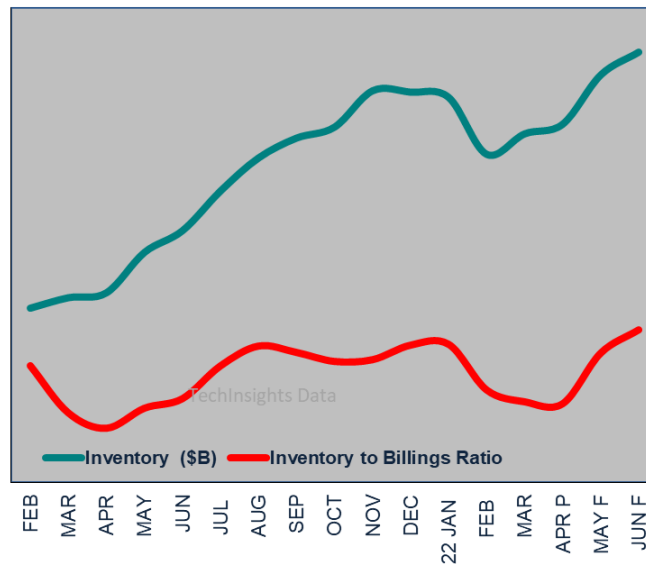
[Contact us to access more details](#)

The Chip Insider[®] Graphics

Overall inventories continue to rise

IC Inventory Levels: chart gives rolling averages for semiconductor integrated circuit inventories held at OEMs and in Die Banks

Semiconductor Inventory



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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](#)

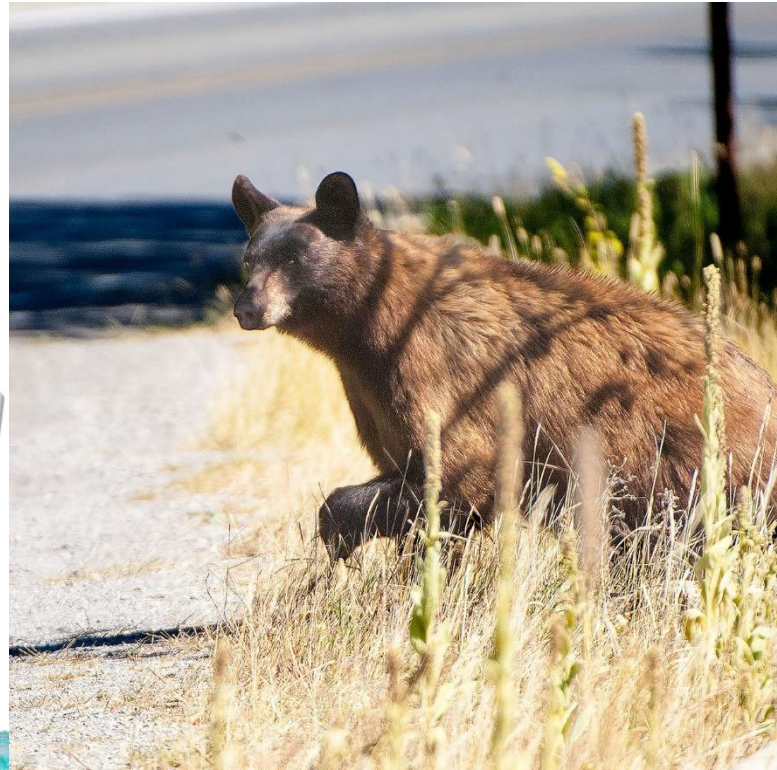
Semiconductor Analytics

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Electronics' Retail Prices are rolling over



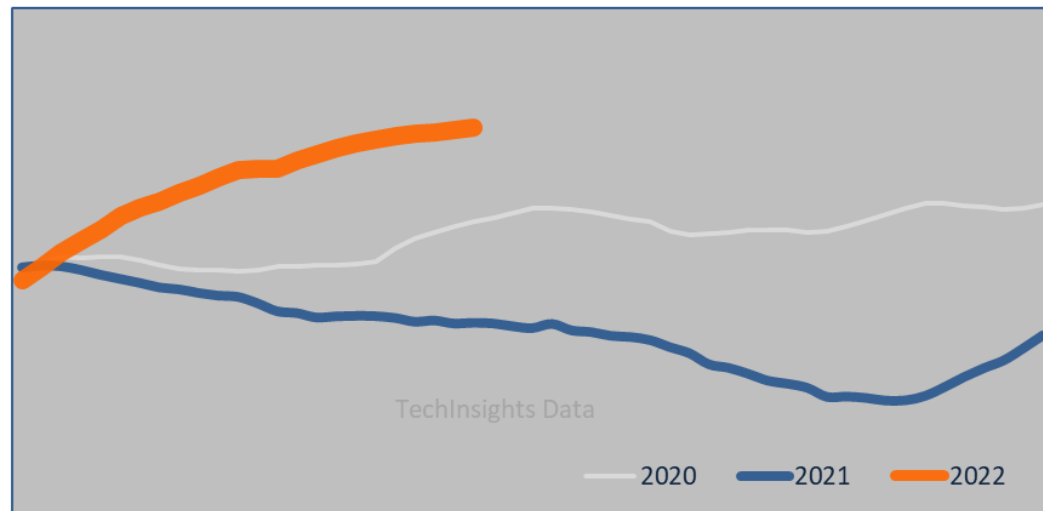
1: Measures Order Activity 2: Measures Pricing Power

Electronics Retail Pricing Trends:

for PC notebooks Tablets Smartphones Cell phones Digital Cameras Appliances TVs

Electronics' Retail Prices are rolling over

Electronics Pricing Barometer
indexed 13 week moving average



Source: Semiconductor Analytics

Quarter.Week

0.00 1.03 1.06 1.09 1.12 2.02 2.05 2.08 2.11 3.01 3.04 3.07 3.10 3.13 4.03 4.06 4.09 4.12

Legend: 2020 (grey line), 2021 (blue line), 2022 (orange line)

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Insights Interview:

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](#)



Strategy and Tactics: Memory Lithography and Product Strategy. Consistent Development Cadence results from solid Probability Management.

Summaries:

Memory Lithography and Product Strategy: Micron recently announced it was jumping back into EUV with plans to install a tool into its DRAM fab in Taiwan. Samsung had long been a proponent of EUV, but both Micron and SK hynix had been reluctant to adopt the technology. This was most notable when Micron canceled its EUV tool order ... let the Logic boys do the learning. Last year, TechInsights Senior Technical Fellow Dr. Jeongdong Choe answered the question brilliantly: If you really believed 3D-DRAM was ... this roadblock to EUV adoption has been cleared.

Consistent Development Cadence results from solid Probability Management. It is a general feature of technology development that there is always a probability of failure along any single path to success. Most of the time, these failures are not fatal, just setbacks – like losing a hand at the poker table. What makes the development of technology so fraught with failure is its inherent reliance on the ‘we’ll think of something’ strategy. Failure to think of something results in

failure to bring a new product to market. Investing heavily in R&D is the classic business model for addressing the ‘failure to think of something’ failure mode. Enough money in and eventually something monetizable should come out, right? But not always. Hence the failure of so many technology giants over the decades due to not directing the money into the right projects. **IBM** broke this mold, reinventing many times over its 100+ year history ... Instead of Research AND Development, **IBM** pioneered a Research ... THEN ... Or as Theodore von Karman put it: “Scientists describe what is. Engineers create what never was.” ... In the early days of the semiconductor industry, R&D was mostly a silicon sandbox for PhDs to play in. This was especially true at Fairchild Semiconductor which would eventually drop out, in no small part, due to this. As Andy Grove emphatically told me years later, “NOTHING got out of R&D into manufacturing at Fairchild.” ... Intel would go from a node-missing basket-case in the 80s ... to the giant the world would come to see it as in the 90s. Key to that would be the development of the ... Using this probability management model, **Intel** was able to extend its lead throughout the 2000s with technology it had been working on for 10 or more years before.

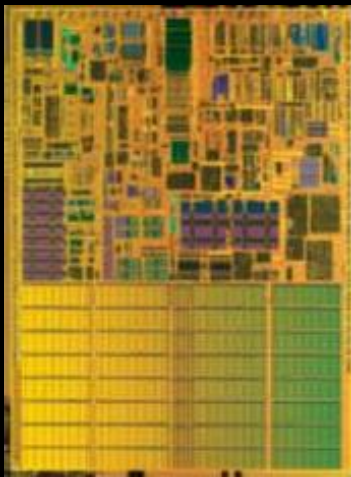
“Execution is Everything” — John Doerr

[Contact us to get the full report and more](#)



Organizations: [Inside Intel's Microprocessor's](#) covers a pictorial and spec history from their first, the 4004, through their Centrino™ P4 with Hyper threading. Along the way, it takes you from transistor counts of 2300 and CDs of 10000nm in 1971 to 77 million transistors at true half-pitch linewidths of 130nm.

[How the SIA got started](#) is a video interview with the legendary Wilf Corrigan who was there when this soon-to-be-great organization got started. He Wilf offers the firsthand account of someone who was literally at table for the founding of the Semiconductor Industry Association. Find out why it got started, how it got started, what they hoped to accomplish, and what they did accomplish. Here you had a group of super-competitive entrepreneurs going to Washington for help against unfair trade practices. Did they ask for a handout like most industry's? Find out the SIA's unique approach to the problem and how it was instrumental in keeping America's Semiconductor industry competitive.



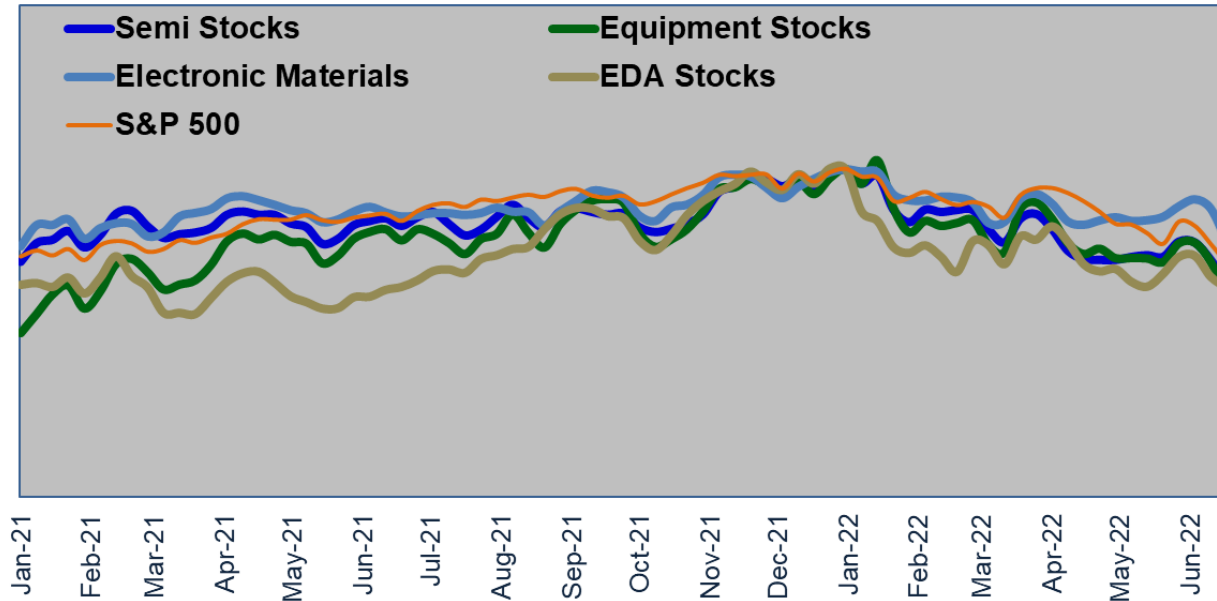
semiStockWEEK:

TechInsights' Semiconductor Stock Indices all plummeted to new yearly lows along with the S&P 500 as investors are concerned about the prospects of a recession coming.



Semiconductor Industry Stock Performance Indices

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



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TechInsights' Stock Indices:

Semiconductors -7.5%
Equipment -10.6%
Electronic Materials -8.9%
EDA -3.6%

Semiconductor Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			6/17/2022		
Semiconductor Stocks	Price Change	Forward P/E	Semiconductor Stocks	Price Change	Forward P/E
IDM			Fab-lite to Fabless		
Intel	-5.6%	11	AMD	-14.0%	19
Micron	-11.0%	5	Analog Devices	-7.8%	16
ON Semiconductor	-12.8%	12	Broadcom	-7.9%	13
Samsung Electronics	-6.3%	-	IBM	-0.9%	13
SK hynix	-6.9%	-	Infineon	-11.4%	13
STMicroelectronics	-8.6%	10	MagnaChip Semiconductor	-9.7%	13
Western Digital	-14.2%	6	MaxLinear	-11.4%	9
Foundry & OSAT			MediaTek	-10.7%	-
Amkor	-11.6%	7	NVIDIA	-6.4%	26
ASE	-5.8%	8	Panasonic	-2.1%	10
GLOBALFOUNDRIES	-13.3%	21	Qualcomm	-9.2%	10
JCET	3.9%	13	Silicon Laboratories	-3.0%	32
SkyWater Technology	-8.3%	-	Skyworks	-10.1%	8
SMIC	-4.1%	12	Texas Instruments	-4.8%	18
TSMC	-4.2%	14			
UMC	-6.6%	9			

Above Avg
Top 4-6
Top 1-3

TechInsights' Semiconductor Stock Index sunk, JCET was the only company to finish the week in positive territory. IBM, Panasonic, and Silicon Laboratories decreased the least, making them some of the top performers this week.

IDM -9.3%
Foundry & OSAT -6.2%
Fabless & Fablite -7.8%

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			6/17/2022		
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
Wafer Fab:			Test:		
Applied Materials	-11.8%	12	Advantest	-11.4%	-
ASM International	-15.0%	20	Teradyne	-8.2%	15
ASML	-9.2%	25	FormFactor	-6.8%	18
KLA	-6.5%	14			
Lam Research	-11.7%	12	Assembly:		
Onto Innovation	-10.0%	-	BESI	-17.3%	-
Nikon	-3.1%	-	Kulicke & Soffa	-11.9%	8
TEL	-13.7%	-	ASM Pacific Technology	-10.1%	
Veeco Instruments	-8.2%	11			

Above Avg
Top 4-6
Top 1-3

TechInsights' Semiconductor Equipment Stock Index plunged this week, only five companies finished above the weekly average. Assembly had an especially rough week. BESI is being brought down, in part, by their share repurchase program.

WFE -9.9%
 Test -8.8%
 Assembly -13.1%

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

Electronic Materials Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			6/17/2022		
EDA & Electronic Materials Stocks	Price Change	Forward P/E	EDA & Electronic Materials Stocks	Price Change	Forward P/E
EDA			DNP	4.0%	–
Cadence	-4.0%	34	DuPont de Nemours	-11.4%	5
Synopsys	-3.0%	31	JSR	-16.2%	–
Ansys	-3.8%	28	Shin-Etsu	-10.2%	–
Electronic Materials			SOITEC	-16.0%	–
BASF	-8.5%	2	Tokyo Ohka	-11.1%	–
CMC Materials	-2.1%	22			
			Above Avg	Top 4-6	Top 1-3

TechInsights' EDA Stock Index fell, Synopsys was one of the companies that decreased the least this week.

TechInsights' Electronic Materials Stock Index plummeted, DNP was this week's top performer, followed by CMC Materials.

Ansys, Inc. ^{ANSS} BASF ^{BASFY}
 CMC Materials ^{CCMP} 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							
12-Nov-21	95.9	95.5	98.7	96.4	1.5%	0.4%	0.7%	1.9%	31	8.5%	-16	-12.1%	20.6%	98.3	-0.3%
19-Nov-21	98.3	97.5	98.2	99.4	2.6%	2.1%	-0.4%	3.2%	39	12.2%	-16	-16.8%	29.0%	98.6	0.3%
26-Nov-21	97.7	96.0	95.5	96.8	-0.6%	-1.6%	-2.8%	-2.7%	16	11.8%	-39	-9.6%	21.4%	98.6	0.1%
03-Dec-21	95.9	94.5	92.9	95.0	-1.9%	-1.6%	-2.7%	-1.9%	12	6.0%	-44	-11.1%	17.1%	95.2	-3.5%
10-Dec-21	97.5	96.9	95.7	98.8	1.6%	2.6%	3.0%	4.0%	40	13.2%	-15	-7.5%	20.7%	98.9	3.8%
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%

Links to Conference Call Transcripts

June 17th

[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 \(Transcript\)](#)

June 10th and before

[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 \(Transcript\)](#)

[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 \(Transcript\)](#)

Links to Conference Call Transcripts

[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 \(Transcript\)](#)

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