

Semiconductor WEEK:

July 29, 2022

An overview of results and conclusions from recent reports at TechInsights

Chip Market Research Services

It's still warm and sunny, but there's bifurcation

- Order activity for semiconductor equipment continued to cool off, slipping to 88 degrees
- Despite the recent slowdown, order activity remains in a healthy expansion phase
- Fab Capacity Utilization by Wafer Size

Semiconductor Analytics

Last Week in the Semiconductor Market:

Semiconductor sales growth turned up sequentially and was 17% above 2021 levels last week. The IC weather cooled 0°F. Zooming in on DRAMs this week, the 13-wk MA continues to head towards zero Y/Y growth range after peaking in early March. TechInsights forecasts DRAM will reach \$103B in 2022, with Y/Y growth of 8% that dips to 3% in 2023.

TechInsights' IC Supply/Demand indices held last week at Saturated, as conditions were mostly unchanged in a buyer's market. More than Moore Foundry rose out of a Glut into Saturated levels. Chip demand is being cooled by inflation and monetary tightening. Capacity expansion and Just-in-Case are driving up supply and inventory.

Electronics' Retail Prices are declining.

Customer Satisfaction Survey

White Paper: Nidec SV TCL – Five Star Partner to Customers

Chip History Center

Time Line: Teradyne J259 IC Test System: This was the first truly computer-controlled IC test system.

People: The Rise of ASML: **Martin van den Brink**, employee number 1 at ASML, describes what was like to take on lithography's giants and win in this 2006 interview.

The Chip Insider

Strategy and Tactics: SEMICON West and Forecast perspectives. SMIC's 7nm Chips. EUV changing Fab Economics...

Semiconductor Stocks

- *TechInsights' Semiconductor Stock Indices continued to soar this week along with the market*
- *Semiconductor Stock Index was led up by ON Semiconductor*
- *Semiconductor Equipment Stock Index was led up by ASM International*
- *EDA Stock Index was led up by Cadence*
- *Electronics Materials Stock Index was led up by Entegris*
- *Hottest Stocks: ON Semiconductor, Cadence, ASM International, STMicroelectronics, Texas Instruments, Infineon, and Synopsys*

TechInsights

Nidec SVTCL

Five Star Partner to Customers

TechInsights Customer Satisfaction Survey 2022

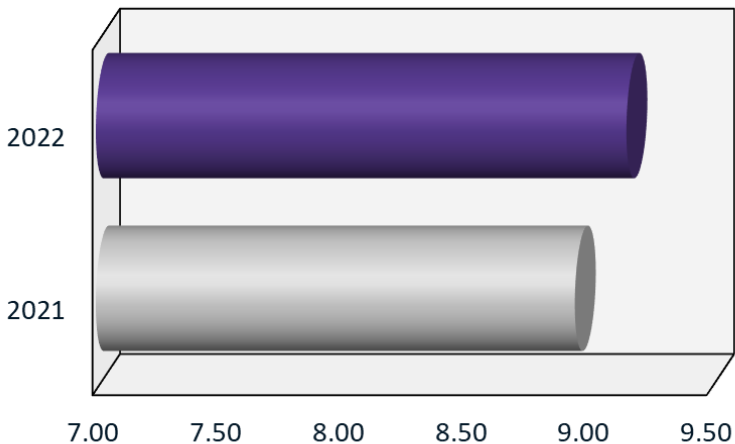




Nidec SV TCL awarded one of THE BEST Suppliers in Test Subsystems

- Nidec SV TCL, a leading global supplier of innovative MEMS probes, high-performance probe cards, and semiconductor test solutions receives THE BEST *Test Subsystems Suppliers* award for 10th consecutive year
- Earns 5 Stars from customers with an excellent 9.16 rating
 - up 21 basis points from last year
- Nidec SV TCL continued commitment to customers provides outstanding five-star customer satisfaction

Nidec SV TCL's THE BEST Test Subsystems Award History

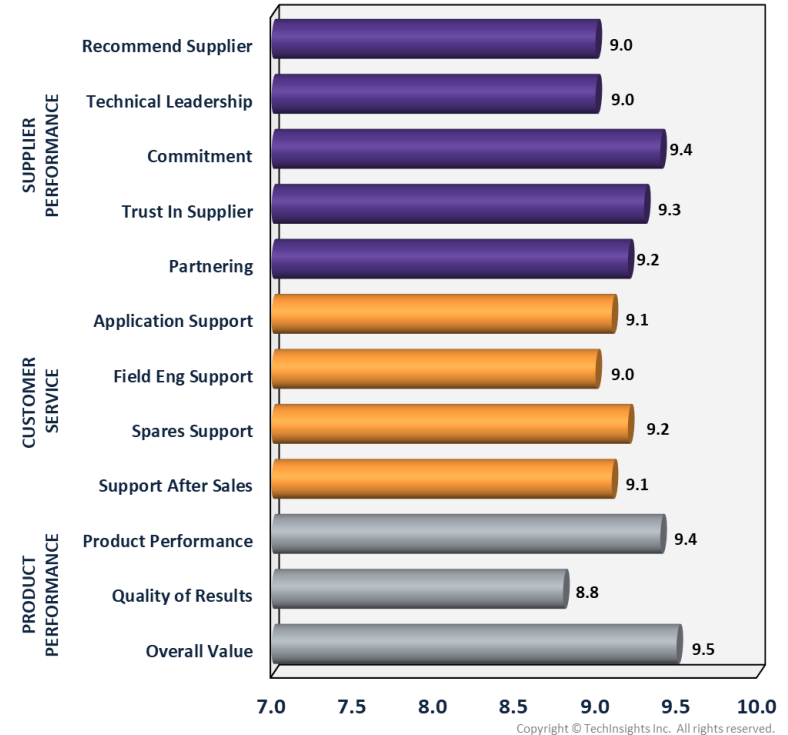


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How Customers Perceive Nidec SV TCL

- Improves ratings in 10 categories
 - *trust in supplier, product performance, and overall value* up 50 basis points
 - *field engineering support* up 30 basis points
 - *recommend supplier, technical leadership, commitment, and application support* up 20 basis points
 - *spares support and support after sales* up 10 basis points
- Customers award Nidec SV TCL with a 9.2 average rating in both *Supplier Performance* and *Product Performance*
- Highest scores*
 - *Overall Value*
 - *Commitment*
 - *Product Performance*
 - *Trust In Supplier*

*Listed in order of score, highest to lowest



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**Tech
Insights**

The Chip Insider[®]'s Graphics File



July 2022

It's still warm and sunny, but there's bifurcation



- Order activity for semiconductor equipment continued to cool off, slipping to 88 degrees
- Despite the recent slowdown, order activity remains in a healthy expansion phase
- Bookings and backlogs are still hovering at record levels, especially for WFE suppliers
- TechInsights' Chip Price Performance Index continued to head south

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	\$ 2,732
Sequential Change	18.9%	6.1%

[Contact us to access more details](#)

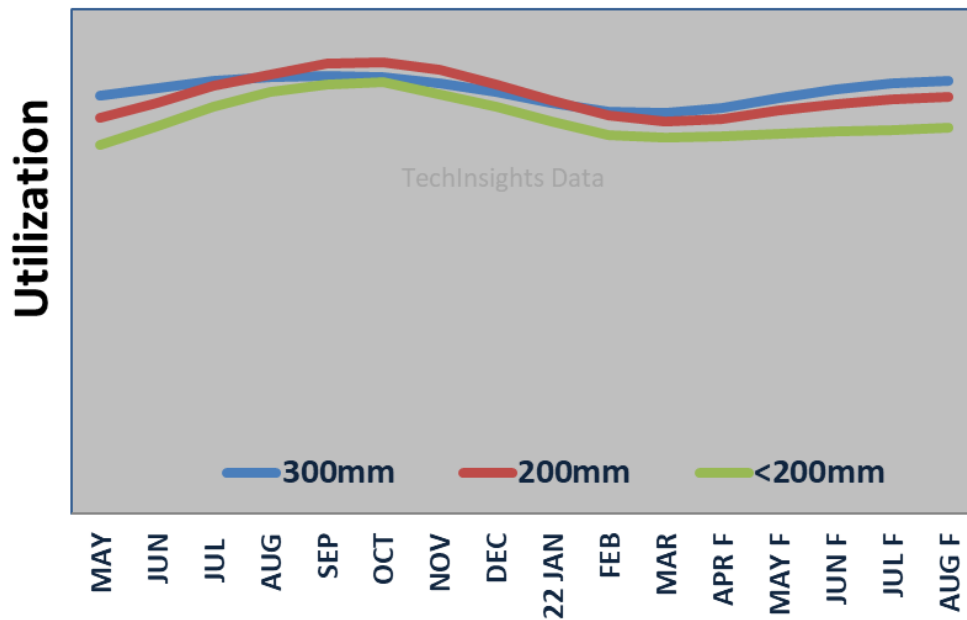
The Chip Insider® Graphics

Capacity Utilization by Wafer Size:

- Utilization rates remain high across the board

Fab Capacity Utilization by Wafer Size: Chart gives rolling averages for 300mm, 200mm, and smaller silicon wafers

Fab Capacity Utilization by Wafer Size
(rolling average)



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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

Last Week in the Semiconductor Market:

Semiconductor sales growth turned up sequentially and was 17% above 2021 levels last week. The IC weather cooled 0°F. Zooming in on DRAMs this week, the 13-wk MA continues to head towards zero Y/Y growth range after peaking in early March. TechInsights forecasts DRAM will reach \$103B in 2022, with Y/Y growth of 8% that dips to 3% in 2023.

TechInsights' IC Supply/Demand indices held last week at Saturated, as conditions were mostly unchanged in a buyer's market. More than Moore Foundry rose out of a Glut into Saturated levels. Chip demand is being cooled by inflation and monetary tightening. Capacity expansion and Just-in-Case are driving up supply and inventory.

Electronics' Retail Prices are declining.



1: Measures Order Activity 2: Measures Pricing Power

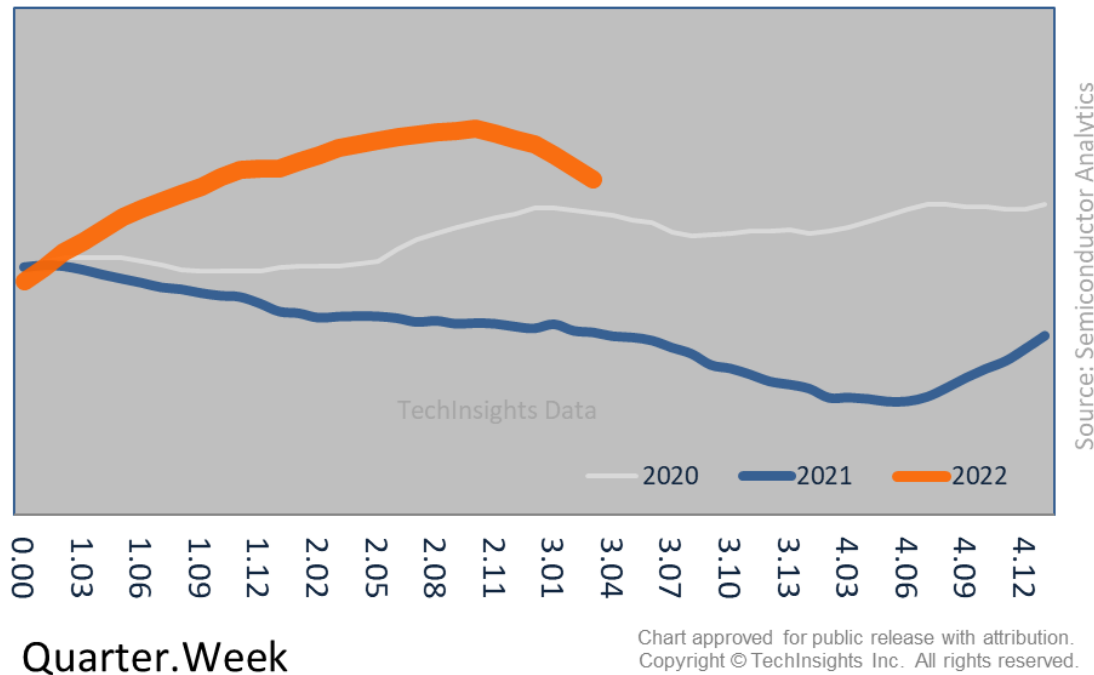
W/Q: Week-over-Week sequential growth W/Q: Week-over-Quarter W/Y: Week-over-Year

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

Chart approved for public release with attribution.
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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 & Tactics



Strategy and Tactics: SEMICON West and Forecast perspectives. SMIC's 7nm Chips. EUV changing Fab Economics...

Summaries:

SEMICON West was packed as the world's silicon-birds came back to their migratory path, after two years of various COVID forced lockdowns, in an attempt to regain their bearings on where the industry was going. SEMI did better than their normal excellent job of running things. Its speaker series has really come along and this year's star-studded cast of keynote speakers was a treat, though as usual I was too busy meeting people to attend most. There were some notable ones. There was the Director of NIST. It was the first time ever a NIST Director came to SEMICON. There was the perennial Gary Dickerson from Applied Materials, who said equipment intensity will remain constant as semiconductors rise, while business leaders have become convinced they can't be successful without chips. Seeing the fireside chat with IBM's Arvind Krishna and Mukesh Khare was a real treat as well. Moreover, San Francisco appeared much healthier than the crack-head infested city we'd experienced late last year. Everyone generally enjoyed themselves ... especially those who were coming

into town from heat-wave regions. Probably the most important reason people came was to get a gauge on where the industry was going into the second half and 2023 as well. At the start of the year, everyone assumed we had another two-year run of growth.

SMIC's 7nm Chips: Tom's Hardware report of a Minerva bitcoin miner teardown by TechInsights uncovered early results of "initial images suggest it is a close copy of TSMC 7nm process technology," according to TechInsights. The real fact TechInsights uncovered it here is that it exists. SMIC was working on 7nm back in 2018-19 and announced its availability in 1Q2020 with risk production scheduled for 4Q2020, which is when the first tape-out was announced...

However, SMIC long struggled with ... so many, including myself, didn't believe it was commercially feasible for anything other than ... The other issue is power, for which ... The common wisdom – not mine – would also argue ... This is where the geopolitics of Technology Sovereignty hits a potential inflection point.

"Forecasting is difficult... Especially when it's about the future"

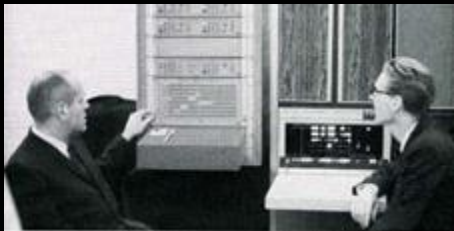
– Yogi Berra

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



Time Line: Teradyne J259 IC Test System: This was the first truly computer-controlled IC test system. Introduced in 1966 it sported a DEC mini-computer. With a paper-tape reader and teletype as I/O it went for the astounding price of \$58,500. It was a runaway best seller and established Teradyne's position as a leader in the emergent IC testing market following a long-time leadership position in discrete testing.

Click on the link to find the true story behind the curious naming of the J259.



People: The Rise of ASML: Martin van den Brink, employee number 1 at ASML, describes what was like to take on lithography's giants and win in this 2006 interview. At the time ASML was at the forefront of the productivity revolution and Europe's Hi-Tech turnaround.

Find out what the critical decisions were and how they were made as this once small company, from a small country below sea level, climbed the highest peaks of Hi-Tech....



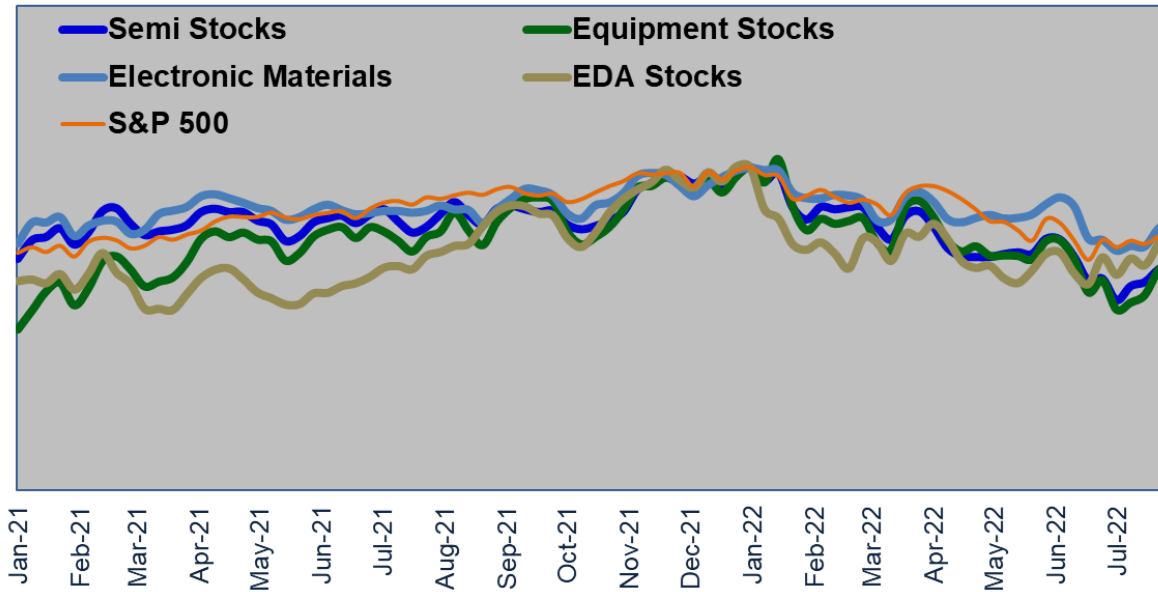
semiStockWEEK:

TechInsights' Semiconductor Stock Indices continued to soar this week along with the market as solid quarter earnings reports are being released.



Semiconductor Industry Stock Performance Indices

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



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TechInsights' Stock Indices:

Semiconductors +2.4%
Equipment +3.3%
Electronic Materials +2.2%
EDA +9.0%

Semiconductor Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			7/29/2022		
Semiconductor Stocks	Price Change	Forward P/E	Semiconductor Stocks	Price Change	Forward P/E
IDM			Fab-lite to Fabless		
Intel	-7.4%	11	AMD	7.2%	18
Micron	0.9%	9	Analog Devices	5.3%	17
ON Semiconductor	12.4%	12	Broadcom	4.5%	13
Samsung Electronics	0.2%	-	IBM	1.9%	13
SK hynix	-2.1%		Infineon	8.7%	12
STMicroelectronics	9.3%	10	MagnaChip Semiconductor	-5.5%	12
Western Digital	4.0%	6	MaxLinear	4.1%	9
Foundry & OSAT			MediaTek	-3.1%	-
Amkor	7.1%	7	NVIDIA	4.9%	28
ASE	3.7%	6	Panasonic	-0.4%	11
GLOBALFOUNDRIES	6.9%	21	Qualcomm	-5.6%	12
JCET	1.4%	13	Silicon Laboratories	5.1%	33
SkyWater Technology	5.0%	-	Skyworks	2.6%	9
SMIC	-3.1%	11	Texas Instruments	9.1%	18
TSMC	2.5%	13			
UMC	-3.7%	7			

Above Avg

Top 4-6

Top 1-3

TechInsights' Semiconductor Stock Index was led up by ON Semiconductor, who was this week's biggest winner. STMicroelectronics, Texas Instruments, and Infineon were also top performers this week.

IDM +2.5%
Foundry & OSAT +2.5%
Fabless & Fablite +2.8%

AMD^{AMD} Analog Devices^{ADI} Amkor^{AMKR} ASE^{ASE}
ASX^{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			7/29/2022		
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
Wafer Fab:			Test:		
Applied Materials	4.2%	12	Advantest	4.1%	-
ASM International	10.4%	21	Teradyne	0.4%	16
ASML	7.5%	25	FormFactor	-9.9%	19
KLA	8.3%	15			
Lam Research	7.9%	12	Assembly:		
Onto Innovation	5.2%	-	BESI	-0.8%	-
Nikon	-4.2%	-	Kulicke & Soffa	-1.6%	8
TEL	1.7%	-	ASM Pacific Technology	-2.0%	
Veeco Instruments	5.1%	11			

Above Avg Top 4-6 Top 1-3

TechInsights' Semiconductor Equipment Stock Index was again led up by ASM International who reported record high orders in Q2, followed by KLA, Lam Research, and ASML.

WFE +5.1%
 Test -1.8%
 Assembly -1.5%

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 ^{VECO}

Electronic Materials Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			7/29/2022		
EDA & Electronic Materials Stocks	Price Change	Forward P/E	EDA & Electronic Materials Stocks	Price Change	Forward P/E
EDA			DNP	-0.6%	–
Cadence	11.0%	38	DuPont de Nemours	6.9%	5
Synopsys	8.7%	35	JSR	-0.8%	–
Ansys	7.2%	30	Shin-Etsu	1.9%	–
Electronic Materials			SOITEC	2.6%	–
BASF	2.0%	2	Tokyo Ohka	-2.3%	–
Entegris	7.5%	21			

Above Avg
Top 4-6
Top 1-3

TechInsights' EDA Stock Index was led up by Cadence and Synopsys.

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

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							
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%
29-Jul-22	76.6	77.2	86.7	88.8	2.4%	3.3%	2.2%	9.0%	39	12.4%	-16	-9.9%	22.3%	86.7	4.3%

Links to Conference Call Transcripts

July 29th

[STMicroelectronics N.V. \(STM\) CEO Jean-Marc Chery on Q2 2022 Results - Earnings Call Transcript](#)

[ASE Technology Holding Co., Ltd. \(ASX\) Q2 2022 Results - Earnings Call Transcript](#)

[Cohu, Inc. \(COHU\) CEO Luis Müller on Q2 2022 Results - Earnings Call Transcript](#)

[KLA Corporation \(KLAC\) CEO Rick Wallace on Q4 2022 Results - Earnings Call Transcript](#)

[MKS Instruments, Inc. \(MKSI\) CEO John Lee on Q2 2022 Results - Earnings Call Transcript](#)

[Samsung Electronics Co., Ltd. \(SSNLF\) Q2 2022 Results - Earnings Call Transcript](#)

[FormFactor, Inc. \(FORM\) CEO Michael Slessor on Q2 2022 Results - Earnings Call Transcript](#)

[Lam Research Corporation \(LRCX\) CEO Tim Archer on Q4 2022 Results - Earnings Call Transcript](#)

[QUALCOMM Incorporated \(QCOM\) CEO Cristiano Amon on Q3 2022 Results - Earnings Call Transcript](#)

[MaxLinear, Inc. \(MXL\) CEO Kishore Seendripu on Q2 2022 Results - Earnings Call Transcript](#)

[Camtek Ltd \(CAMT\) CEO Rafi Amit on Q2 2022 Results - Earnings Call Transcript](#)

[Teradyne, Inc. \(TER\) CEO Mark Jagiela on Q2 2022 Results - Earnings Call Transcript](#)

[United Microelectronics Corporation \(UMC\) Management on Q2 2022 Results - Earnings Call Transcript](#)

[NXP Semiconductors N.V.'s \(NXPI\) CEO Kurt Sievers on Q2 2022 Results - Earnings Call Transcript](#)

July 22nd and before

[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](#)

Links to Conference Call Transcripts

[ASMPT Ltd \(ASMFV\) 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](#)

[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 \(Transcript\)](#)

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