

# Semiconductor WEEK:

September 9, 2022

*An overview of results and conclusions from recent reports at TechInsights*

## Chip Market Research Services

**Temperatures are cooling amid rising uncertainty...**

- Order activity for semiconductor equipment slipped to 82 degrees
- IC Inventory Levels

## Semiconductor Analytics

**Last Week in the Semiconductor Market:**

Semiconductor sales dipped 6% below 2021 levels last week, as the IC weather cooled 1°F to Chilly conditions. Zooming in on DRAMs this week, the 13-wk growth MA dropped to -13% Y/Y, falling off last year's peak of +54% in October.

TechInsights forecasts it will slide to \$94B in 2022, with Y/Y growth of -2% that falls to -7% in 2023, which may be optimistic.

TechInsights' IC Supply/Demand metrics continued to weaken last week. More than Moore Foundry and OSAT fell to Glut, joining More Moore Foundry, DRAM, and NAND. Additionally, IDM slipped from Loose to Saturated. Analog and Power held at Balanced and Auto ICs are actually showing signs of additional tightness.

The early signs of a bottom in Electronics' Retail Prices have diminished.

## Chip History Center

**People:** Yan Borodovsky discusses what was happening in 2007 with DFM and Computational Lithography at Intel in this historic interview series.

**People:** Craig Barrett discusses how Intel turned manufacturing into the powerhouse it is today, in the first of this series with Dr. Barrett from 2006.

## The Chip Insider

**Strategy and Tactics:** Gelsinger's Systems Foundry Business Model.

## **Semiconductor Stocks**

- *TechInsights' Semiconductor Stock Indices jumped this week*
- *Semiconductor Stock Index was led up by Silicon Laboratories*
- *Semiconductor Equipment Stock Index was led up by BESI*
  - *BESI was this week's top performer*
- *EDA Stock Index was led up by Ansys*
- *Electronics Materials Stock Index was led up by Entegris*
  - *All companies finished in positive territory*
- *Hottest Stocks: BESI, Entegris, Silicon Laboratories, ASM International, STMicroelectronics, and ASML*

**TechInsights**

# 2022 SIA AWARDS DINNER THURSDAY, NOVEMBER 17, 2022

SAN JOSE MARRIOTT  
301 S MARKET ST, SAN JOSE, CA 95113  
SIA Reception: 5-6:30 pm  
Dinner, Awards, Keynote: 6:30-8:30 pm  
After-Dinner Reception: 8:30-10 pm

NOYCE AWARD RECIPIENT

## LIP-BU TAN

Executive Chairman and Former CEO  
Cadence Design Systems,  
Inc. Founder and Chairman  
Walden International  
Founding Managing Partner  
Walden Catalyst Ventures



KEYNOTE SPEAKER

## JIM FARLEY

President and CEO  
of Ford Motor  
Company



For more information about tickets and  
sponsorship opportunities please contact  
Sarah Ravi at [sravi@semiconductors.org](mailto:sravi@semiconductors.org)

# The Chip Insider<sup>®</sup>'s Graphics File



## August 2022

*Temperatures are cooling amid rising uncertainty...*

- Order activity for semiconductor equipment slipped to 82 degrees
- The memory market is now in the midst of a downturn due to a significant supply/demand imbalance
- TechInsights' Chip Price Performance Index extended its slump



Forecast as of August 2022:	2022	2023
<b>Semi Equipment (\$B):</b>	<b>\$ 139.4</b>	<b>\$ 132.3</b>
Sequential Change	9.9%	-5.1%
<b>Capacity Utilization:</b>	96.2%	90.9%
<b>ICs (\$B):</b>	<b>\$ 529.1</b>	<b>\$ 507.7</b>
Sequential Change	7.5%	-4.0%
<b>IC Units (BU):</b>	419.3	415.9
Sequential Change	6.4%	-0.8%
<b>Electronics (\$B) :</b>	<b>\$ 2,622</b>	<b>\$ 2,517</b>
Sequential Change	1.9%	-4.0%

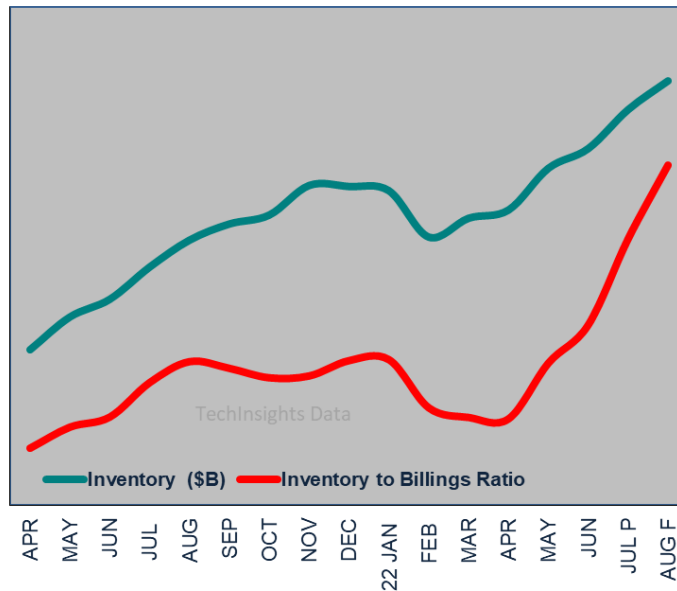
[Contact us to access more details](#)

# The Chip Insider<sup>®</sup> Graphics

Inventories continue to build up

**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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1: Measures Order Activity 2: Measures Pricing Power

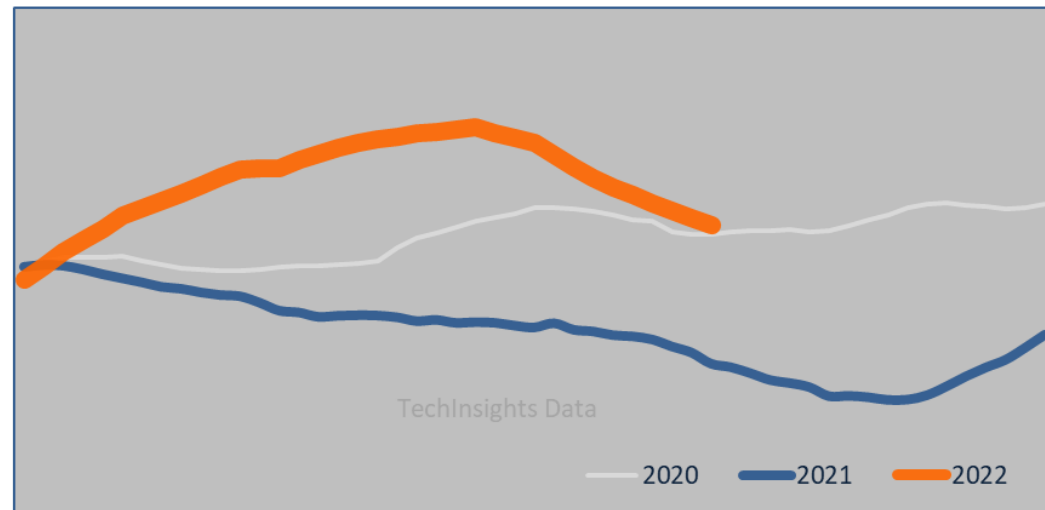
# Electronics Retail Pricing Trends:

for PC notebooks Tablets Smartphones Cell phones Digital Cameras Appliances TVs

The early signs of a bottom in Electronics' Retail Prices have diminished.

## Electronics Pricing Barometer

indexed 13 week moving average



Source: Semiconductor Analytics

Quarter.Week

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TechInsights



**Strategy and Tactics:** Gelsinger's Systems Foundry Business Model.

### Summaries:

**Gelsinger's Systems Foundry Business Model:** The Foundry/IDM model is dead. Long live the Foundry model... In the beginning, there was the IDM model. The world didn't call it that at the time because there was no foundry model to contrast it with. To understand Pat's strategy, a refresher on the history of semiconductor business models may be helpful... So the industry shifts gear from Systems on Chip to Systems in Package, or Heterogeneous Integration, or Chiplets, or Disaggregated Design, or some other branding that depends more on who you're talking to than what they are actually doing. It's all the same destination, it's just that the industry has yet to settle on a common name. Whatever it's called, there is a decadal cadence to these business models that are causally driven by the cadence of Moore's Law and the 2-node cadence of fab costs... Herein lies a new semiconductor business model challenge that Pat Gelsinger sees: not only are the technologies different, the companies that make them have different core strengths that can't be easily duplicated. The fracturing of the industry's business model was originally driven by dual challenges of the rising density and the cost of a fab... So is this

*truly a process of decadal cadence? I'll let you can make that judgement. What I do know is the causal nature of its driving forces is the same... As for Intel... the term 'systems foundry' is far clearer, as it implies a foundry to make systems, which can be easily laid out as done above...*

**Maxims:** Problems are markets and solutions are products. One of the biggest mistakes companies make in product development is in not understanding this principle. You see it all the time, with marketing professionals foolishly referring to their product as a solution, when there is no problem that it comes close to solving. When they fail, the cliché used is often, "it was a solution in search of a market." But this misses mark. Obviously the developers must have thought ...

**For Your Reference:** Now you have a chance to see me. I have accepted an invitation to speak at the NIST colloquium series Friday, September 16th, 2022, 8 AM PT/11 AM ET.

*"If you don't like what's being said, change the conversation"  
— Don Draper, Mad Men*

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

**TechInsights**





**People:** Yan Borodovsky discusses what was happening

in 2007 with DFM and Computational Lithography at Intel in this historic interview series. Intel had made quite a splash with its announcement that it had developed a new form of computational lithography. At the time, Dr. Borodovsky was a Senior Intel Fellow and Director of Advanced Lithography there. In the first video, he describes the technology. In the second, he demonstrates how it works. In the third, details how innovation really happens at companies like Intel.



[DFM and Computational Lithography](#)

[Yan Borodovsky demonstrates it](#)

[Breaking the Limits, Solving the Unsolvable](#)

**People:** Craig Barrett discusses how Intel turned

manufacturing into the powerhouse it is today, in the first of this series with Dr. Barrett from 2006. He describes the origins of manufacturing lore such as Copy Exactly, Intel U, and refsnart in this interview. Then he also discusses the future of American competitiveness and the importance of math and science. At the time, he was Chairman of Intel.



[How Intel Rebuilt Manufacturing in the mid-80's](#)

[American Competitiveness](#)

[Math, Science, and Your Future](#)

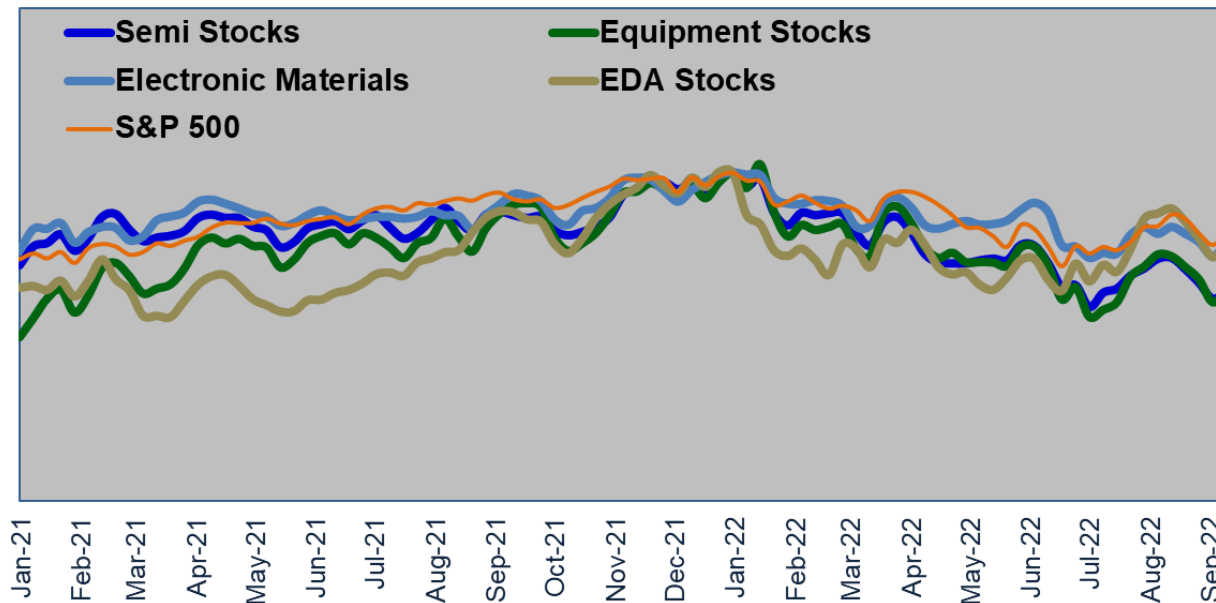
# semiStockWEEK:

TechInsights' Semiconductor Stock Indices and the S&P 500 jumped this week after falling the previous three weeks.



## Semiconductor Industry Stock Performance Indices

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



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### TechInsights' Stock Indices:

Semiconductors +3.2%  
Equipment +4.9%  
Electronic Materials +4.6%  
EDA +4.2%

# Semiconductor Stocks:

## Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			9/9/2022		
Semiconductor Stocks	Price Change	Forward P/E	Semiconductor Stocks	Price Change	Forward P/E
<b>IDM</b>			<b>Fab-lite to Fables</b>		
Intel	0.8%	12	AMD	6.5%	16
Micron	2.0%	14	Analog Devices	3.7%	16
ON Semiconductor	6.2%	14	Broadcom	4.4%	12
Samsung Electronics	-3.3%	-	IBM	1.1%	13
SK hynix	-1.4%		Infineon	6.3%	11
STMicroelectronics	7.3%	10	MagnaChip Semiconductor	0.3%	15
Western Digital	5.2%	7	MaxLinear	5.7%	8
<b>Foundry &amp; OSAT</b>			MediaTek	0.5%	-
Amkor	2.2%	6	NVIDIA	5.4%	22
ASE	4.2%	6	Panasonic	-0.8%	11
GLOBALFOUNDRIES	4.0%	24	Qualcomm	2.8%	10
JCET	0.8%	14	Silicon Laboratories	10.2%	28
SkyWater Technology	-9.5%	-	Skyworks	4.3%	8
SMIC	6.3%	10	Texas Instruments	4.7%	18
TSMC	0.8%	13			
UMC	0.2%	7			

Above Avg  
Top 4-6  
Top 1-3

**TechInsights' Semiconductor Stock Index** was led up by Silicon Laboratories, getting a boost from the optimistic outlook for their 3Q22 earnings, STMicroelectronics was also a top performer this week.

IDM +2.4%  
Foundry & OSAT +1.1%  
Fables & Fablite +3.9%

AMD<sup>AMD</sup> Analog Devices<sup>ADI</sup> Amkor<sup>AMKR</sup> ASE<sup>ASE</sup>  
ASX<sup>ASX</sup> Broadcom<sup>AVGO</sup> GLOBALFOUNDRIES<sup>GFS</sup>  
IBM<sup>IBM</sup> Infineon<sup>IFNNY.PK</sup> Intel<sup>INTC</sup>  
JCET<sup>T600584.SS</sup> Micron Technology<sup>MU</sup> On  
Semiconductor<sup>ON</sup> Panasonic<sup>PC</sup> MagnaChip  
Semiconductor<sup>MX</sup> MaxLinear<sup>MXL</sup>  
MediaTek<sup>2454.TW</sup> NVIDIA<sup>NVDA</sup> Qualcomm<sup>QCOM</sup>  
Samsung Electronics<sup>005930.KS</sup> Silicon  
Laboratories<sup>SLAB</sup> SkyWater Technology<sup>SKYT</sup>  
Skyworks<sup>SWKS</sup> SMIC<sup>SMI</sup> STMicroelectronics<sup>STM</sup>  
Texas Instruments<sup>TXN</sup> TSMC<sup>TSM</sup> UMC<sup>UMC</sup>  
Western Digital<sup>WDC</sup>

# Chip Equipment & Related Stocks:

## Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			9/9/2022		
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
<b>Wafer Fab:</b>			<b>Test:</b>		
Applied Materials	5.8%	11	Advantest	1.4%	-
ASM International	9.0%	20	Teradyne	7.0%	13
ASML	7.2%	23	FormFactor	2.8%	16
KLA	7.0%	14			
Lam Research	4.8%	12	<b>Assembly:</b>		
Onto Innovation	5.8%	-	BESI	13.1%	-
Nikon	-1.8%	-	Kulicke & Soffa	1.7%	11
TEL	0.9%	-	ASM Pacific Technology	0.6%	
Veeco Instruments	5.9%	10			

Above Avg   Top 4-6   Top 1-3

**TechInsights' Semiconductor Equipment Stock Index** was led up by BESI, who was also this week's top performer. ASM International and ASML were top performing stocks as well.

WFE +5.0%  
 Test +3.7%  
 Assembly +5.1%

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

# Electronic Materials Stocks:

## Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			9/9/2022		
EDA & Electronic Materials Stocks	Price Change	Forward P/E	EDA & Electronic Materials Stocks	Price Change	Forward P/E
<b>EDA</b>			DNP	2.9%	–
Cadence	3.9%	37	DuPont de Nemours	6.6%	5
Synopsys	2.9%	34	JSR	1.6%	–
Ansys	5.8%	29	Shin-Etsu	2.4%	–
<b>Electronic Materials</b>			SOITEC	3.8%	–
BASF	5.3%	2	Tokyo Ohka	1.7%	–
Entegris	12.2%	19			

Above Avg
Top 4-6
Top 1-3

TechInsights' EDA Stock Index was led up by Ansys.

TechInsights' Electronic Materials Stock Index was led up by Entegris, all companies finished the week in positive territory.

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

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							
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	-0.6%
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	1.8%
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%
05-Aug-22	79.0	80.1	85.1	90.1	3.1%	3.8%	-1.9%	1.5%	47	33.8%	-8	-17.1%	50.9%	87.0	0.4%
12-Aug-22	79.2	79.6	86.8	91.2	0.3%	-0.6%	1.9%	1.3%	33	22.3%	-22	-17.4%	39.7%	89.8	3.3%
19-Aug-22	76.4	77.0	85.1	88.0	-3.6%	-3.3%	-1.9%	-3.6%	9	17.4%	-46	-8.1%	25.5%	88.7	-1.2%
26-Aug-22	73.1	74.0	83.1	83.9	-4.3%	-3.9%	-2.3%	-4.7%	2	1.1%	-53	-17.8%	18.9%	85.1	-4.0%
02-Sep-22	69.2	68.4	79.6	79.4	-5.4%	-7.5%	-4.1%	-5.4%	1	2.1%	-54	-16.1%	18.2%	82.3	-3.3%
09-Sep-22	71.4	71.8	83.3	82.7	3.2%	4.9%	4.6%	4.2%	50	13.1%	-5	-9.5%	22.6%	85.3	3.6%

# Links to Conference Call Transcripts

September 9<sup>th</sup>

[Western Digital Corporation \(WDC\) Presents at Evercore ISI 2nd Annual TMT Conference \(Transcript\)](#)

[ON Semiconductor Corporation \(ON\) Presents at Citi 2022 Global Technology Conference \(Transcript\)](#)

[ASML Holding NV \(ASML\) Citi 2022 Global Technology Conference \(Transcript\)](#)

[International Business Machines Corporation \(IBM\) Evercore ISI 2nd Annual Technology, Media & Telcom Conference 2022 Call Transcript](#)

[Analog Devices Inc. \(ADI\) 2022 Evercore ISI 2nd Annual Technology, Media & Telcom Conference \(Transcript\)](#)

[Applied Materials, Inc. \(AMAT\) Presents at Citi 2022 Global Technology Conference \(Transcript\)](#)

[Western Digital Corporation \(WDC\) Citi 2022 Global Technology Conference](#)

[NXP Semiconductors N.V. \(NXPI\) Presents at 2022 Citi's 2022 Global Technology Conference \(Transcript\)](#)

[Lam Research Corporation \(LRCX\) Management Presents at Evercore ISI 2nd Annual Technology, Media & Telcom Conference 2022 \(Transcript\)](#)

[Texas Instruments \(TXN\) Presents at Citigroup 2022 Global Technology Conference - Conference Call Transcript](#)

September 2<sup>nd</sup> and before

[Broadcom Inc. \(AVGO\) Q3 2022 Earnings Call Transcript](#)

[Micron Technology, Inc. \(MU\) Presents at Deutsche Bank 2022 Technology Conference \(Transcript\)](#)

[ON Semiconductor Corporation \(ON\) Deutsche Bank 2022 Technology Conference \(Transcript\)](#)

[Intel Corp \(INTC\) Deutsche Bank Technology Conference Transcript](#)

[Western Digital Corporation \(WDC\) Deutsche Bank 2022 Technology Conference \(Transcript\)](#)

[NVIDIA Corporation \(NVDA\) CEO Jensen Huang on Q2 2023 Results - Earnings Call Transcript](#)

# Links to Conference Call Transcripts

[Applied Materials, Inc.'s \(AMAT\) CEO Gary Dickerson on Q3 2022 Results - Earnings Call Transcript](#)

[Synopsys, Inc. \(SNPS\) CEO Aart de Geus on Q3 2022 Results - Earnings Call Transcript](#)

[Analog Devices Inc. \(ADI\) CEO Vincent Roche on Q3 2022 Results - Earnings Call Transcript](#)

[Agilent Technologies, Inc. \(A\) CEO Mike McMullen on Q3 2022 Results - Earnings Call Transcript](#)

[SkyWater Technology, Inc. \(SKYT\) CEO Thomas Sonderman on Q2 2022 Results - Earnings Call Transcript](#)

[Magnachip Semiconductor Corporation \(MX\) CEO YJ Kim on Q2 2022 Results - Earnings Call Transcript](#)

[ACM Research, Inc. \(ACMR\) CEO David Wang on Q2 2022 Results - Earnings Call Transcript](#)

[Western Digital Corporation \(WDC\) CEO David Goeckeler on Q4 2022 Results - Earnings Call Transcript](#)

[Skyworks Solutions, Inc.'s \(SWKS\) CEO Liam Griffin on Q3 2022 Results - Earnings Call Transcript](#)

[Kulicke and Soffa Industries, Inc. \(KLIC\) CEO Fusen Chen on Q3 2022 Results - Earnings Call Transcript](#)

[Infineon Technologies AG \(IFNNY\) CEO Jochen Hanebeck on Q3 2022 Results - Earnings Call Transcript](#) [Advanced Energy Industries, Inc. \(AEIS\) CEO Stephen Kelley on Q2 2022 Results - Earnings Call Transcript](#)

[Qorvo, Inc.'s \(QRVO\) CEO Bob Bruggeworth on Q1 2023 Results - Earnings Call Transcript](#)

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