

Semiconductor WEEK:

November 4, 2022

An overview of results and conclusions from recent reports at TechInsights

Chip Market Research Services

The fog is starting to roll in

- Order activity for semiconductor equipment extended its decline, slipping to 66 degrees
- IC Inventory Levels

Semiconductor Analytics

Last Week in the Semiconductor Market:

Semiconductor sales crawled 1% last week, riding 2020 levels. The IC weather warmed 1°F in Cool conditions.

Zooming in on Logic ICs this week, 13-wk MAs growth has been returning to normal, since peaking at +32% the week of November 19 to -36% last week. TechInsights forecasts Logic IC sales will reach \$267B in 2023 with a Y/Y decline of -5%, coming off 10% growth in 2022.

TechInsights' IC Supply/Demand metrics continued to improve for the 5th week in a row, taking overall conditions up a notch from Balanced to Tight, joining Analog & Power. NAND went from Balanced to Tight, while Foundry moved up to Balanced with IDM on the strength of More than Moore. OSAT improved, rising to Loose. But, Electronics' Retail Prices are peaking before the holidays.

Chip History Center

The Chip History Hall of Fame: Check out the CHC's Semiconductor Hall-of-Fame Section.

The Chip Insider

Strategy and Tactics: Foundry Strategy evolving for a chiplet era

Semiconductor Stocks

- *TechInsights' Semiconductor Stock Indices were mixed while the S&P 500 sunk*
- *Semiconductor Stock Index was led up by Panasonic*
 - *Panasonic was this week's top performer*
- *Semiconductor Equipment Stock Index was led up by ASM Pacific Technology*
- *EDA Stock Index plummeted*
- *Electronics Materials Stock Index fell*
 - *DuPont de Nemours bucked the trend and finished as one of the top six performing stocks*
- *Hottest Stocks: Panasonic, ASM Pacific Technology, Onto Innovation, DuPont de Nemours, MediaTek, and Nikon*

Manufacturing Analysis Conferences



Dan is Vice Chair of TechInsights Inc. He is a recognized authority on the semiconductor industry, winning SEMI's Sales and Marketing Excellence Award¹ in 2012 for "empowering executives with tremendous strategic and tactical marketing value" through his e-letter, *The Chip Insider*[®]; his book *Maxims of Hi-Tech*, and his many interviews of executives.

As some industry leaders have said, "He is the marketing voice and expert for the industry." "Dan has methodically captured the essence of the industry and produced it in such a way for all to benefit ... He has been such an integral part of the industry for so long, it is difficult to imagine the industry without his contributions."

Dan's public work on the industry has often focused on challenging predictions of the demise of Moore's Law that date back decades by demonstrating how doomsayers have been outpaced by emergent behavior through the innate ability of technologists to innovate. This has included invited articles for *Scientific American*, the *SIA*, and the Plenary at the *SPIE Advanced Lithography Conference*.

¹ Formerly SEMI's Bob Graham Award

Dan Hutcheson

Keynote

Wednesday, November 16th

9:05 am

**Frontier of Challenge and
Opportunity: Semiconductors
Shortages, Geopolitics & Outlooks
Room 14a**

Moderator

Wednesday, November 16th

11:35 am

**Navigating Through Global
Developments Affecting the Supply
Chain Management
Room 14a**

SEMICON[®] EUROPA

November 15-18th, 2022

Messe München
Munich, Germany

The Chip Insider[®]'s Graphics File



October 2022

The fog is starting to roll in



- Order activity for semiconductor equipment extended its decline, slipping to 66 degrees
- Dipping below the Growth-Decline line for the first time since May 2020
- All segments trended lower with Memory getting hit the hardest, falling to a new low for the year
- TechInsights' Chip Price Performance Index continued to trend lower

Forecast as of October 2022:	2022	2023
Semi Equipment (\$B):	\$ 136.9	\$ 118.2
Sequential Change	7.9%	-13.6%
Capacity Utilization:	95.4%	89.8%
ICs (\$B):	\$ 516.2	\$ 486.3
Sequential Change	4.9%	-5.8%
IC Units (BU):	412.9	405.9
Sequential Change	4.7%	-1.7%
Electronics (\$B) :	\$ 2,534	\$ 2,430
Sequential Change	-1.6%	-4.1%

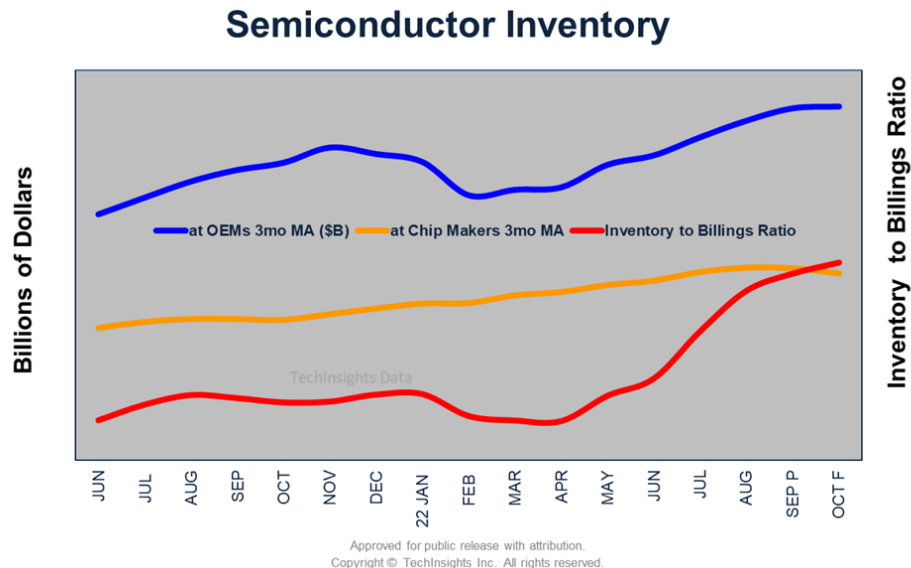
[Contact us to access more details](#)

The Chip Insider[®] Graphics

IC Inventory Levels:

- Inventories are soaring

IC Inventory Levels: chart gives rolling averages for semiconductor integrated circuit inventories held at OEMs, in Die Banks, and the total Inventory-to-Billing Ratio



2022 SIA AWARDS DINNER THURSDAY, NOVEMBER 17, 2022

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

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



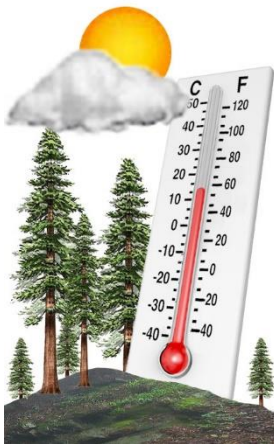
For more information about tickets and
sponsorship opportunities please contact
Sarah Ravi at sravi@semiconductors.org

Semiconductor Analytics

Last Week in the Semiconductor Market:

Semiconductor sales crawled 1% last week, riding 2020 levels. The IC weather warmed 1°F in Cool conditions. Zooming in on Logic ICs this week, 13-wk MAs growth has been returning to normal, since peaking at +32% the week of November 19 to -36% last week. TechInsights forecasts Logic IC sales will reach \$267B in 2023 with a Y/Y decline of -5%, coming off 10% growth in 2022.

TechInsights' IC Supply/Demand metrics continued to improve for the 5th week in a row, taking overall conditions up a notch from Balanced to Tight, joining Analog & Power. NAND went from Balanced to Tight, while Foundry moved up to Balanced with IDM on the strength of More than Moore. OSAT improved, rising to Loose. But, Electronics' Retail Prices are peaking before the holidays.

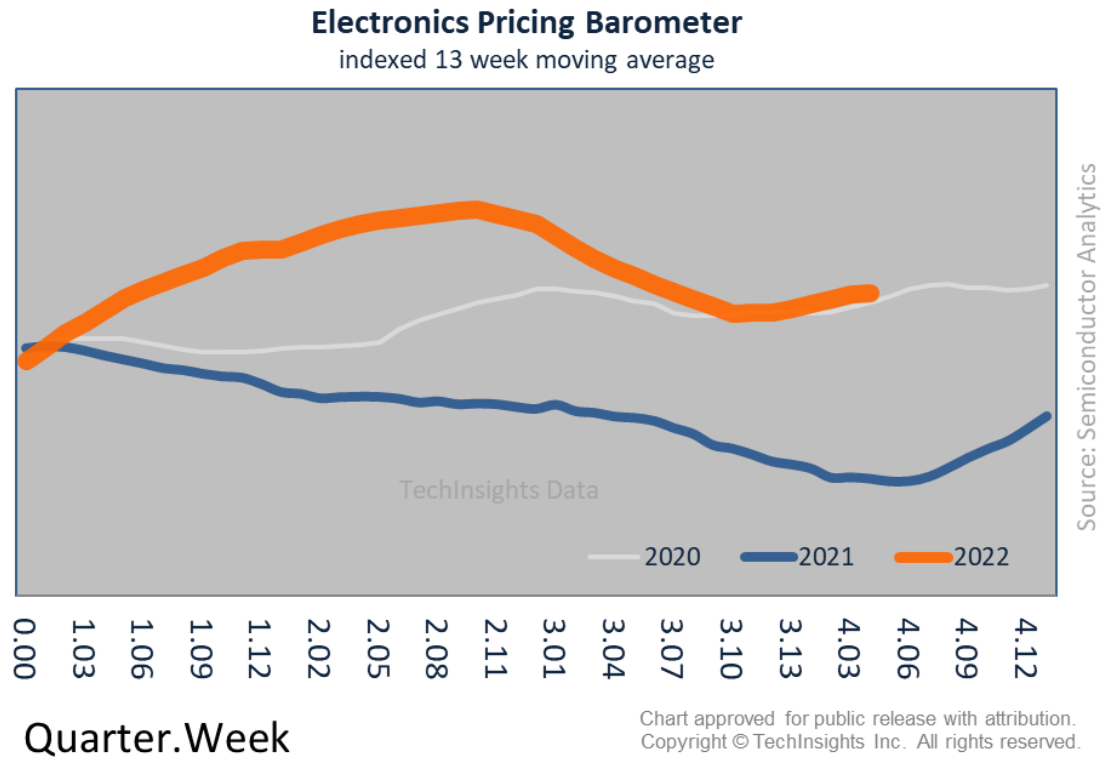


IC Weather Measures Order Activity S/D Measures Pricing Power

Electronics Retail Pricing Trends:

for PC notebooks Tablets Smartphones Cell phones Digital Cameras Appliances TVs

Electronics' Retail
Prices are peaking
before the holidays.



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](#)

Strategy & Tactics



Strategy and Tactics: Foundry Strategy evolving for a chiplet era

Summaries:

Foundry Strategy evolving for a chiplet era: There's been plenty of foundry coming out efforts in recent months that offer new pictures of what they are up to and how their differentiation strategies have evolved over the COVID lockdown. They've been very productive over the last two years in finding ways to carve out specific domains, so I thought it would be good to lay them out. I will start with the big 3 that still focus on More Moore advanced silicon and then cover two More-than-Moore players. These include TSMC, Samsung, Intel, GlobalFoundries, and SkyWater...

"A good plan, violently executed now is better than a perfect plan tomorrow"

— General George S. Patton

Happenings, Comments, Questions & Answers: Why are they called foundries? U.S. and China growth...

Dan's Book Shelf: Danger Zone: The Coming Conflict with China by Hal Brands and Michael Beckley. This book is a must-read for those with critical business interests in China.

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

TechInsights



THE CHIP HISTORY CENTER

The Virtual Museum of Semiconductors

Section

Search...



Hall of Fame [\(View List\)](#)

about Technisights' Semiconductor Industry All Stars and Hall of Fame

Search

Category

Sub-category

SEARCH

RESET

A-Z



C.C. WEI – HOF



TSMC has become the keystone of the modern semiconductor industry and its separation of design and wafer fabricatio ...

MARK LIU – HOF



TSMC has become the keystone of the modern semiconductor industry and its separation of design and wafer fabricatio ...

SANJAY MEHROTRA – HOF



Sanjay is a memory legend, from both technical and business perspectives. His foundational knowledge was built at p ...

TONY (TOSHIKI) KAWAI – HOF



Great leaders go long and make big bets on a brighter future. That's what Tony did 5 years ago when TEL launched a ...

AART DE GEUS – ALL STAR 2021 ...



The rising cost of design has been a phantom worry-wall put forth by consultants for decades.

BENJAMIN LOH – ALL STAR 2021 ...



Assumed role as ASM International's CEO in 2020 at the beginning of the perfect industry storm. ASMI has held its ...

JOHN E. KELLY III – ALL STAR ...



John is no stranger after a long career of leadership at IBM. Though he retired this year, he was far from inactive ...

JOHN NEUFFER – ALL STAR 2021 ...



It's times like these that industry associations are worth their weight in gold. But this is only true when the lea ...

KEITH WELLS – ALL STAR 2021 ...



Imaging with photons has always been the go-to technology for inspection and metrology because it's faster, cheaper ...

MARTIN VAN DEN BRINK AND WIN ...



ASML



Both industry leaders have been driving the semiconductor manufacturing through EUV development.

MIKE SLESSOR – ALL STAR 2021 ...

MIKE ALLISON – ALL STAR 2021 ...

RICHARD BLICKMAN – ALL STAR ...

FUSEN CHEN – ALL STAR 2021

HITOSHI YOSHIDA – ALL STAR 2 ...

The Chip History Hall of Fame

Check out the CHC's
Semiconductor Hall-of-Fame Section.

www.chiphistory.org

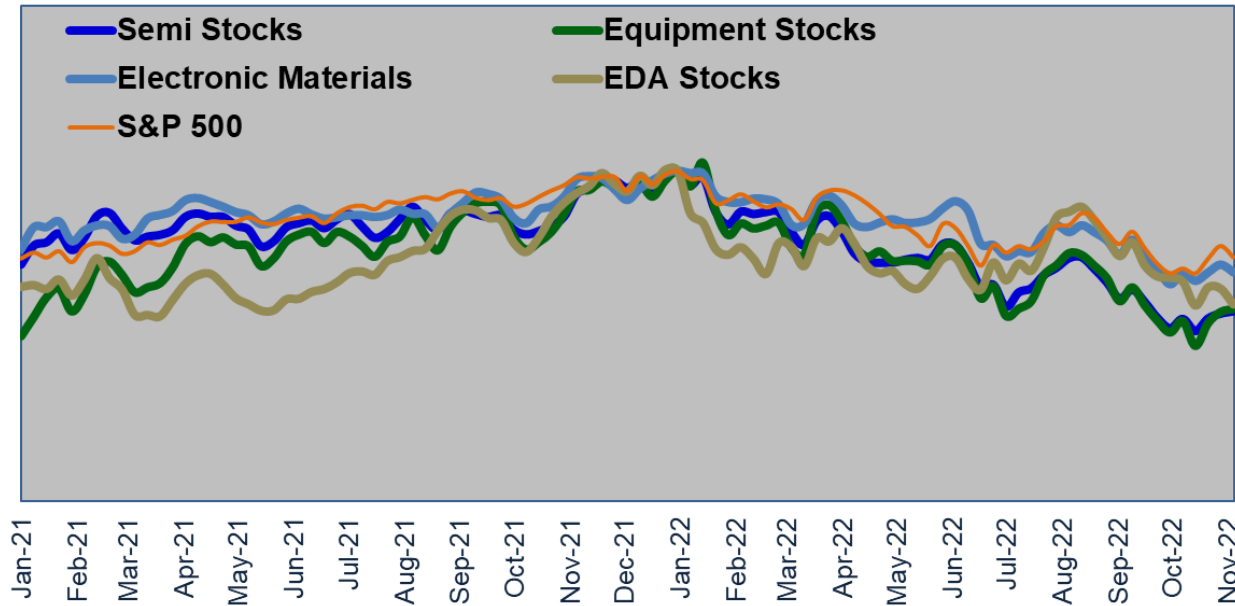
semiStockWEEK:

TechInsights' Semiconductor Stock Indices were mixed while the S&P 500 sunk as investors were disappointed with the jobs report and are wary about the feds decision to raise rates once again.



Semiconductor Industry Stock Performance Indices

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



TechInsights' Stock Indices:

Semiconductors +0.9%
Equipment +1.0%
Electronic Materials -2.4%
EDA -5.3%

Semiconductor Stocks:

Weekly Growth and Forward P/E Ratios by Company

Weekly Gains			11/4/2022		
Semiconductor Stocks	Price Change	Forward P/E	Semiconductor Stocks	Price Change	Forward P/E
IDM			Fab-lite to Fabless		
Intel	-3.2%	12	AMD	0.3%	16
Micron	3.7%	15	Analog Devices	-0.4%	15
ON Semiconductor	-6.7%	14	Broadcom	-1.6%	12
Samsung Electronics	3.7%	–	IBM	-1.2%	14
SK hynix	1.3%		Infineon	1.2%	12
STMicroelectronics	-0.3%	8	MagnaChip Semiconductor	-4.5%	13
Western Digital	-0.4%	9	MaxLinear	0.9%	8
Foundry & OSAT			MediaTek	5.7%	–
Amkor	1.3%	7	NVIDIA	2.2%	32
ASE	1.9%	6	Panasonic	20.3%	10
GLOBALFOUNDRIES	-5.3%	24	Qualcomm	-10.7%	9
JCET	1.7%	14	Silicon Laboratories	1.2%	31
SkyWater Technology	3.4%	–	Skyworks	-0.4%	8
SMIC	2.6%	10	Texas Instruments	0.6%	20
TSMC	0.5%	12			
UMC	3.3%	6			

Above Avg

Top 4-6

Top 1-3

TechInsights' Semiconductor Stock Index was led up by Panasonic followed by MediaTek. Panasonic was this week's top performer buoyed by plans to build a new battery plant in Kansas.

IDM -0.3%
Foundry & OSAT +1.2%
Fabless & Fablite +1.0%

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			11/4/2022		
Equipment Stocks	Price Change	Forward P/E	Equipment Stocks	Price Change	Forward P/E
Wafer Fab:			Test:		
Applied Materials	2.2%	13	Advantest	-1.6%	–
ASM International	-5.0%	20	Teradyne	1.5%	21
ASML	-4.2%	25	FormFactor	-4.1%	18
KLA	1.8%	17			
Lam Research	3.3%	14	Assembly:		
Onto Innovation	7.1%	–	BESI	0.5%	–
Nikon	5.1%	–	Kulicke & Soffa	0.8%	11
TEL	-2.6%	–	ASM Pacific Technology	8.8%	
Veeco Instruments	-3.0%	11			

Above Avg

Top 4-6

Top 1-3

TechInsights' Semiconductor Equipment Stock Index was led up by ASM Pacific Technology followed by Onto Innovation and Nikon. All Assembly Equipment suppliers finished the week above the weekly average.

WFE +4.1%

Test -2.9%

Assembly +2.5%

Applied Materials ^{AMAT} Advantest ^{ATEYY}

ASM International ^{ASMIY}

ASM Lithography ^{ASML} ASM Pacific ^{0522.HK}

BE Semiconductor ^{BESII.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			11/4/2022		
EDA & Electronic Materials Stocks	Price Change	Forward P/E	EDA & Electronic Materials Stocks	Price Change	Forward P/E
EDA			DNP	-2.9%	—
Cadence	-6.1%	33	DuPont de Nemours	6.9%	5
Synopsys	-6.6%	30	JSR	-4.4%	—
Ansys	-3.2%	26	Shin-Etsu	0.7%	—
Electronic Materials			SOITEC	0.2%	—
BASF	1.4%	2	Tokyo Ohka	0.6%	—
Entegris	-21.5%	18			
			Above Avg	Top 4-6	Top 1-3

TechInsights' EDA Stock Index plummeted.

TechInsights' Electronic Materials Stock Index fell, DuPont de Nemours bucked the trend and finished as one of the top six performing stocks.

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							
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%
16-Sep-22	68.3	67.3	78.8	77.0	-4.3%	-6.2%	-5.4%	-6.9%	4	2.3%	-50	-24.2%	26.5%	81.3	-4.8%
23-Sep-22	64.5	63.7	76.0	74.4	-5.5%	-5.5%	-3.5%	-3.4%	3	1.6%	-52	-15.8%	17.4%	77.5	-4.6%
30-Sep-22	62.0	60.8	72.5	74.1	-3.9%	-4.4%	-4.7%	-0.4%	5	4.7%	-49	-11.7%	16.4%	75.2	-2.9%
07-Oct-22	64.3	63.6	75.3	73.2	3.7%	4.6%	3.9%	-1.3%	46	9.8%	-7	-7.8%	17.6%	76.4	1.5%
14-Oct-22	61.4	57.6	73.3	67.4	-4.6%	-9.5%	-2.6%	-7.9%	8	5.8%	-47	-16.1%	21.9%	75.2	-1.6%
21-Oct-22	64.4	63.1	75.3	71.8	4.9%	9.6%	2.8%	6.5%	45	21.9%	-10	-5.2%	27.1%	78.7	4.7%
28-Oct-22	65.6	65.8	77.2	71.4	1.8%	4.3%	2.5%	-0.5%	42	11.5%	-13	-24.7%	36.2%	81.8	4.0%
04-Nov-22	66.1	66.5	75.4	67.7	0.9%	1.0%	-2.4%	-5.3%	32	20.3%	-23	-21.5%	41.8%	79.1	-3.3%

Links to Conference Call Transcripts

November 4th

[Microchip Technology Inc. \(MCHP\) Q2 2023 Earnings Call Transcript](#)

[Skyworks Solutions, Inc. \(SWKS\) Q4 2022 Earnings Call Transcript](#)

[Axcelis Technologies, Inc. \(ACLS\) Q3 2022 Earnings Call Transcript](#)

[MKS Instruments, Inc. \(MKS\) Q3 2022 Earnings Call Transcript](#)

[Qualcomm Inc. \(QCOM\) Q4 2022 Earnings Call Transcript](#)

[Qorvo, Inc. \(QRVO\) Q2 2023 Earnings Call Transcript](#)

[Magnachip Semiconductor Corporation \(MX\) Q3 2022 Earnings Call Transcript](#)

[Vishay Intertechnology, Inc. \(VSH\) Q3 2022 Earnings Call Transcript](#)

[Entegris, Inc. \(ENTG\) Q3 2022 Earnings Call Transcript](#)

[Advanced Energy Industries, Inc. \(AEIS\) Q3 2022 Earnings Call Transcript](#)

[Advanced Micro Devices, Inc. \(AMD\) Q3 2022 Earnings Call Transcript](#)

[Cirrus Logic, Inc. \(CRUS\) Q2 2023 Earnings Call Transcript](#)

[Sony Group Corporation \(SONY\) Q2 2022 Earnings Call Transcript](#)

[NXP Semiconductors N.V. \(NXPI\) Q3 2022 Earnings Call Transcript](#)

[Lattice Semiconductor Corporation \(LSCC\) Q3 2022 Earnings Call Transcript](#)

[Amkor Technology, Inc. \(AMKR\) Q3 2022 Earnings Call Transcript](#)

Links to Conference Call Transcripts

[Panasonic Holdings Corporation \(PCRFY\) Q2 2023 Earnings Call Transcript](#)

[ON Semiconductor Corporation \(ON\) Q3 2022 Earnings Call Transcript](#)

[SK hynix \(HXSCF\) Q3 2022 Earnings Call Transcript](#)

[AIXTRON SE \(AIXXF\) Q3 2022 Earnings Call Transcript](#)

[MediaTek Inc. \(MDTKF\) CEO Rick Tsai on Q3 2022 Results - Earnings Call Transcript](#)

October 28th and before

[STMicroelectronics N.V. \(STM\) Q3 2022 Earnings Call Transcript](#)

[Advantest Corporation \(ATEYY\) Q2 2022 Earnings Call Transcript](#)

[Onto Innovation Inc. \(ONTO\) Q3 2022 Earnings Call Transcript](#)

[Cohu, Inc. \(COHU\) Q3 2022 Earnings Call Transcript](#)

[Intel Corporation \(INTC\) Q3 2022 Earnings Call Transcript](#)

[ASE Technology Holding Co., Ltd. \(ASX\) Q3 2022 Earnings Call Transcript](#)

[Western Digital Corporation \(WDC\) Q1 2023 Earnings Call Transcript](#)

[Samsung Electronics Co., Ltd. \(SSNLF\) Q3 2022 Results - Earnings Call Transcript](#)

[FormFactor, Inc. \(FORM\) Q3 2022 Earnings Call Transcript](#)

[KLA Corporation \(KLAC\) Q1 2023 Earnings Call Transcript](#)

Links to Conference Call Transcripts

[Teradyne, Inc. \(TER\) Q3 2022 Earnings Call Transcript](#)

[MaxLinear, Inc. \(MXL\) Q3 2022 Earnings Call Transcript](#)

[Texas Instruments Incorporated \(TXN\) Q3 2022 Earnings Call Transcript](#)

[BE Semiconductor Industries N.V. \(BESIIY\) Q3 2022 Earnings Call Transcript](#)

[Lam Research Corporation \(LRCX\) Q1 2023 Earnings Call Transcript](#)

[Taiwan Semiconductor Manufacturing Company Limited \(TSM\) Q3 2022 Earnings Call Transcript](#)

[Aehr Test Systems \(AEHR\) Q1 2023 Earnings Call Transcript](#)

[Micron Technology, Inc. \(MU\) Q4 2022 Earnings Call Transcript](#)

[Analog Devices Inc. \(ADI\) 13th Annual U.S. All Stars Conference \(Transcript\)](#)

[Advanced Micro Devices, Inc. \(AMD\) Goldman Sachs Communacopia + Technology Conference \(Transcript\)](#)

[QUALCOMM Incorporated \(QCOM\) Goldman Sachs 2022 Communacopia + Technology Conference \(Transcript\)](#)

[NVIDIA Corporation \(NVDA\) Presents at Goldman Sachs 2022 Communacopia + Technology Conference \(Transcript\)](#)

[NXP Semiconductors N.V. \(NXPI\) Goldman Sachs 2022 Communacopia + Technology Conference \(Transcript\)](#)

[Western Digital Corporation \(WDC\) Goldman Sachs Communacopia + Technology Conference Transcript](#)

[Applied Materials, Inc. \(AMAT\) Presents at Goldman Sachs Communacopia + Technology Conference \(Transcript\)](#)

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

TechInsights recent uploads

Chip Market Research Services Uploads:

ForecastPro Module:

- TCI Graphics – V22.10
- Electronics & Macroeconomy – V22.10
- Diffusion Rates and Utilization – V22.10
- Long-Term Semi and Eqpt Forecast – V22.09
- Silicon Demand – V22.09
- CapEx Distribution – V22.09
- Semiconductor Forecast – V22.09
- Advanced Packaging – V22.07
- Packaging Demand – V22.06

Equipment Database Module:

- IC Equipment Forecast:
 - Yearly – V22.08
- WFE Equipment Market Shares:
 - Yearly – V22.05
 - Quarterly – V22.09
- Scanner & Stepper Shipments – V22.09
- WFE by Applications – V22.09

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.