華碩電腦

2023年第4季投資人說明會

ASUS IN SEARCH OF INCREDIBLE

問與答

1. Will the increase in component prices impact gross margins?

   A: Please refer to webcast 35:28.

2. Is there a possibility for server revenue to be separated from the Component BU in the future? What were the revenue proportions of General Servers and AI Servers in 2023? What are the targets for 2024?

   A: Please refer to webcast 37:27.

3. What is the company's definition of an AI PC? What is the future outlook for the penetration rate of AI PCs?

A: Please refer to webcast 38:58.

4. Will there be any price difference or premium for AI PCs compared to regular laptops? How will the mass shipment of AI PCs impact the company's gross margin?

   A: Please refer to webcast 43:03.

5. It was mentioned that AI servers accounted for 10% of the total server business in 2022, 35% in 2023, and are expected to reach 70% in 2024. Is this from the perspective of revenue share or shipment share?

A: Please refer to webcast 45:44.

6. What is the company's profit margin outlook for 2024 and the subsequent quarters?

   A: Please refer to webcast 46:50.

7. What are the types of server business customers?

   A: Please refer to webcast 49:07.

8. What is the company's outlook for the overall PC market shipment volume in 2024? What are the growth prospects for the Consumer, Commercial, and Gaming PC markets, respectively? ASUS has always aimed to exceed industry growth as a long-term goal; what direction has the company set for 2024?

A: Please refer to webcast 50:51.