IN SEARCH OF INCREDIBLE

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2022年第3季投資人說明會

IN SEARCH OF INCREDIBLE

問與答

1. The inventory adjustment progress in Q3 2022 was better than expected. Can you give us some color on the plan and target of inventory management in the next few quarters? When can we return to the normal level?

A: Please refer to webcast 28:58.

2. According to the guidance, there will be 5% QoQ growth for component business in Q4 2022. Will both motherboards and graphics cards business achieve growth momentum?

   It is said that EVGA, a major graphics card manufacturer in the U.S., has withdrawn from the market. What is your view on the change of market landscape for the other brands? Does it help to increase sales and market share for ASUS?

A: Please refer to webcast 31:05.

ASUS

3. What is your view on the overall PC industry in 2023?

A: Please refer to webcast 34:00.

4. It seems that the industry is still challenging. What is your view on the operating margin in Q4 2022?

A: Please refer to webcast 35:56.

5. Can you give us some color on smartphone shipments and financial status?

A: Please refer to webcast 39:14.

6. How much of the inventory is finished goods in Q3 2022? What is the current channel inventory level? What is the difference compared to the normal inventory level?

A: Please refer to webcast 41:44.

7. As mentioned, the PC inventory will return to a healthy level until Q2 next year. Is there any difference in the inventory adjustment trend between system products and component products?

A: Please refer to webcast 45:18.

8. Regarding the PC market outlook for 2023, is it for the whole PC market(desktop PC + NB), or is it only for the NB market? Based on this expectation, what is the target ASUS set to outperform the market?

A: Please refer to webcast 47:06.

9. What is your view on the growth of gaming PC market in 2022 and 2023?

A: Please refer to webcast 48:37.

10. What is the dividend policy for next year?

A: Please refer to webcast 50:29.