

Calitech Co., Ltd (6532)

2026 Q3 Investor Conference

2026.08.31



瑞耘科技股份有限公司
Calitech CO., LTD.

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- Quality Engineering, Manufacturing &
Services Are Our Commitments

Outline

- I. Company Overview
- II. Industry Landscape vs. Product Portfolio
- III. Operating Performance
- IV. 2026 Operating Update and Outlook



Company Overview

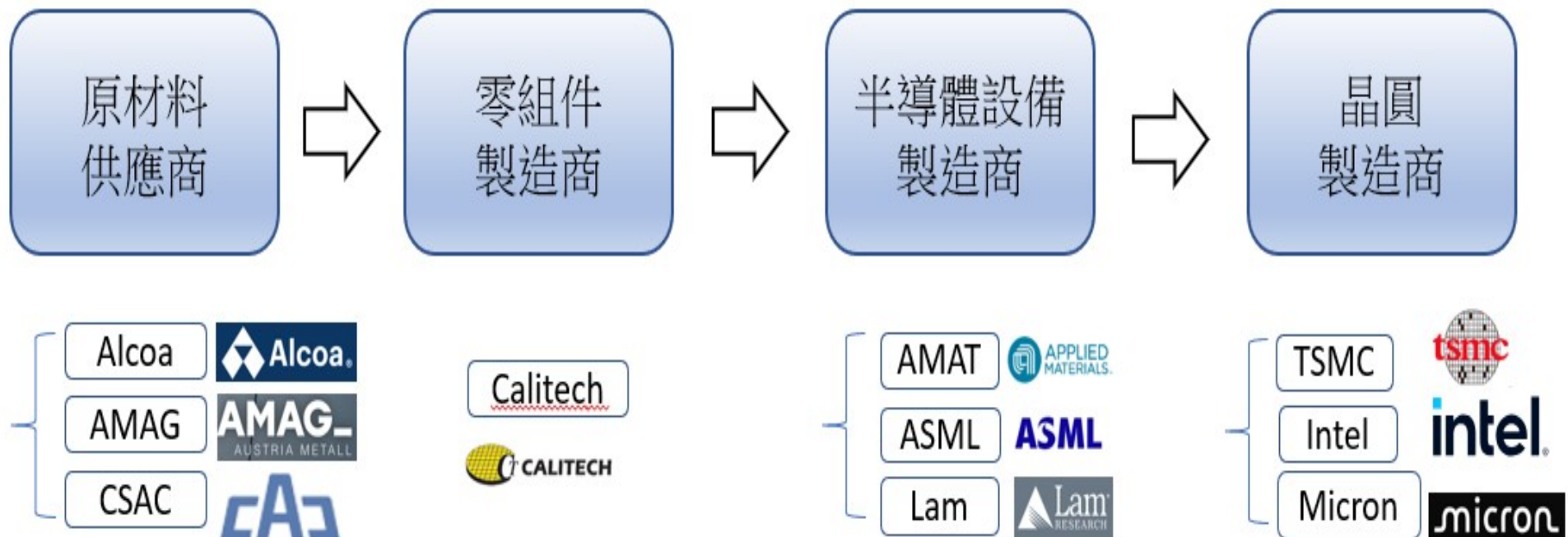
- **Established:** 1998
- **Paid-in Capital:** NT\$374 million
- **Chairman:** Hsueh-Heng Lu
- **President:** Hsueh-Heng Lu
- **Number of Employees:** 150
- **Main Products:**
Components for front-end
semiconductor process equipment



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Industry Structure & Calitech's Market Positioning



Portfolio of Production



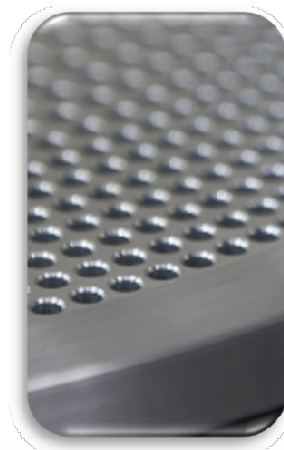
Retainer Ring
Outer Ring
Inner Ring

(CMP Process)



Clamp Ring
Deposition Ring
Focus Ring
Edge Ring

(PVD Process)
(Etching Process)



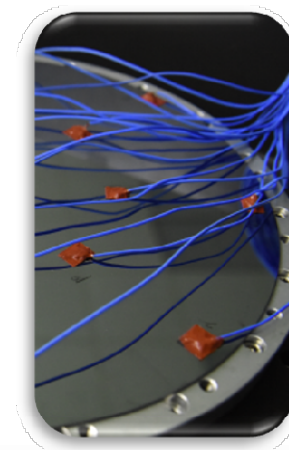
Shower Head
Face Plate
Blocker Plate
GDP

(CVD Process)
(ALD Process)
(Etching Process)



Chamber Coating
Chamber Lid
Chamber Liner
Confinement Ring

(ALD Process)
(PVD Process)
(CVD Process)
(Etching Process)



E-Chuck
Heater
Electrode

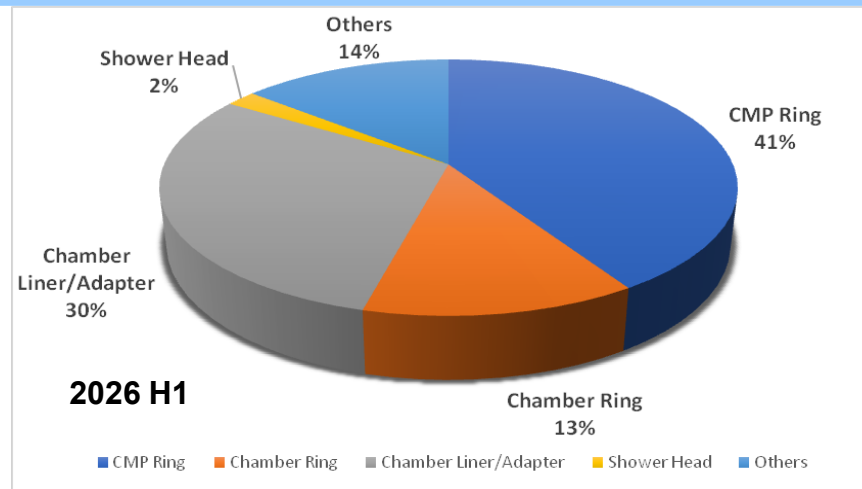
(Vacuum Chamber)



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Product Portfolio – Revenue Mix



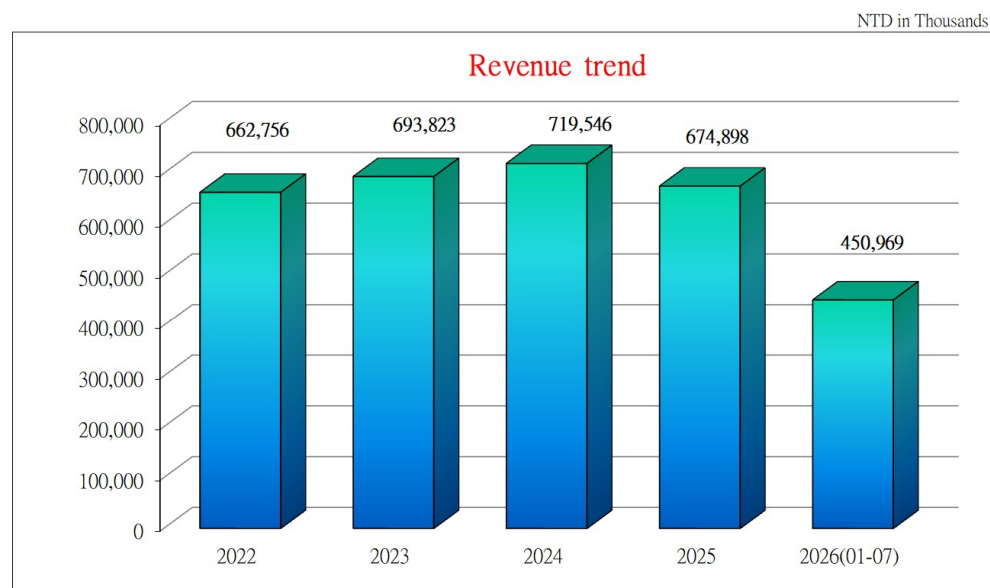
Product Group	Parts
CMP Ring (化學機械平坦化保持環)	• Retainer Ring (保持環) • Inner Ring (內環) / Outer Ring (外環)
Chamber Ring (腔體環)	• Clamp Ring (壓緊環/晶圓固定環) • Focus Ring (聚焦環/集焦環)
Chamber Liner/Adaptor (腔體內襯/轉接器)	• Liner(腔體內襯) • Shield (腔室屏蔽/遮罩)
Shower Head (氣體分配盤/勻氣盤)	• Face Plate (氣體分配盤－面盤) • Blocker Plate (氣體分配盤－阻隔盤)
Others (其它)	• Screw/Cover /Cap/Plug (螺絲、墊片、間格環...等配件) • Washer/Spacer/Shim



Operating Performance

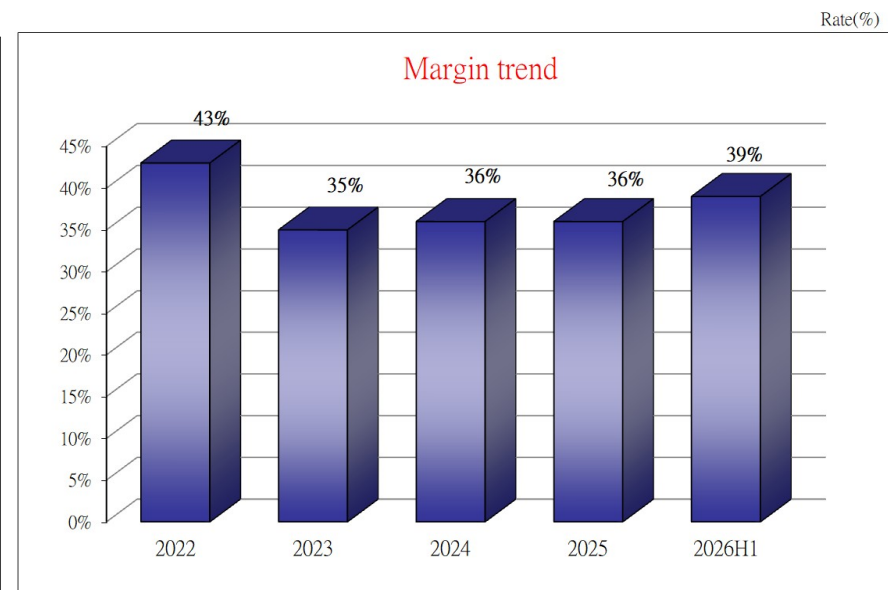
Consolidated Revenue and Gross Margin in Recent Years

2022 ~ 202601~07 Revenue



	2022	2023	2024	2025	2026(01-07)
Revenue	662,756	693,823	719,546	674,898	450,969
YOY(%)	31%	5%	4%	-6%	9%

2022 ~ 2026H1 Gross Margin



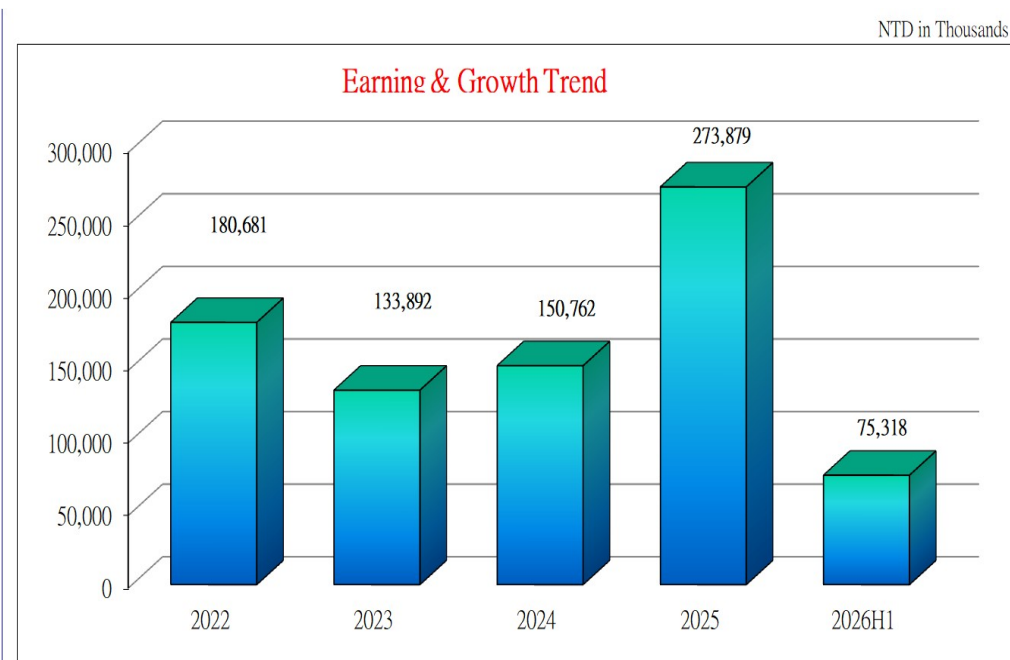
	2022	2023	2024	2025	2026H1
GP(%)	43%	35%	36%	36%	39%



Operating Performance

Consolidated Net Income After Tax and EPS in Recent Years

2022 ~ 2026H1 Net Income



	2022	2023	2024	2025	2026H1
Net Profit	180,681	133,892	150,762	273,879	75,318
YOY(%)	90%	-26%	13%	82%	57%

2022 ~ 2026H1 EPS



	2022	2023	2024	2025	2026H1
EPS	5.00	3.59	4.03	7.31	2.01



Statement of Comprehensive Income

Item	NTD in Thousands									
	Q2'26		Q1'26		QoQ		Q2'25		YoY	
	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%
Operating revenue	207,257	100	155,737	100	51,520	33	163,313	100	43,944	27
Gross profit	85,436	41	57,514	37	27,922	49	49,144	30	36,292	74
Operating profit	58,579	28	32,790	21	25,789	79	32,502	20	26,077	80
Non-operating income and expenses	1,955	1	6,403	4	(4,448)	(69)	(30,922)	(19)	32,877	106
Profit before income tax	60,534	29	39,193	25	21,341	54	1,580	1	58,954	3,731
Net income	43,966	21	31,352	20	12,614	40	(245)	0	44,211	18,045
EPS (NT\$)	1.17		0.84		0.33	39	(0.01)		1.18	11,800



Statement of Financial Position (BS)

Balance Sheets

Item	NTD in Thousands					
	Jun30'26		Dec31'25		Jun30'25	
	Amount	%	Amount	%	Amount	%
Cash and cash equivalents	445,938	27	162,797	10	287,594	22
Accounts receivable, net	150,312	9	130,759	8	116,397	9
Other receivables	4,827	0	288,940	19	2,208	0
Inventories, net	197,115	12	135,098	9	122,647	9
Property, plant and equipment, net	770,833	47	754,515	48	724,032	56
Others	83,934	5	95,277	6	47,544	4
Total assets	1,652,959	100	1,567,386	100	1,300,422	100
Current liabilities	412,611	25	291,305	19	270,094	21
Non-current liabilities	4,419	0	2,895	0	1,004	0
Total liabilities	417,030	25	294,200	19	271,098	21
Total equity	1,235,929	75	1,273,186	81	1,029,324	79
Total liabilities and equity	1,652,959	100	1,567,386	100	1,300,422	100



Statement of Cash Flows

Statements of Cash Flows

Item	NTD in Thousands	
	YTD Q2'26	YTD Q2'25
Cash flows from operating	69,173	92,311
Cash flows from investing	265,604	(19,667)
Cash flows from financing	(50,596)	(533)
Effect of Exchange Rates on Cash	(1,040)	(10,719)
Net increase (decrease) in Cash	283,141	61,392
Cash and cash equivalents	445,938	287,594



2026 H1 Operating Overview

■ Business Performance

202601~07 Revenue YoY Growth 9%

Global semiconductor manufacturing equipment sales are projected to reach **US\$165.9 billion** in 2026, representing 23.2% growth from 2025 and a record high. Growth is primarily driven by capacity-expansion projects in Japan, Europe, and Taiwan.

Multiple new wafer fabs worldwide are expected to enter the equipment-installation phase in the second half of the year, supporting equipment-order visibility through 2028. Semiconductor-equipment customers are accelerating and increasing procurement of critical component materials.

■ Operating Overview

Taiwan Headquarters

Production capacity is fully utilized. To meet substantially higher customer inventory-preparation demand and accelerate order fulfillment, the Company has been recruiting additional personnel and purchasing new production equipment.

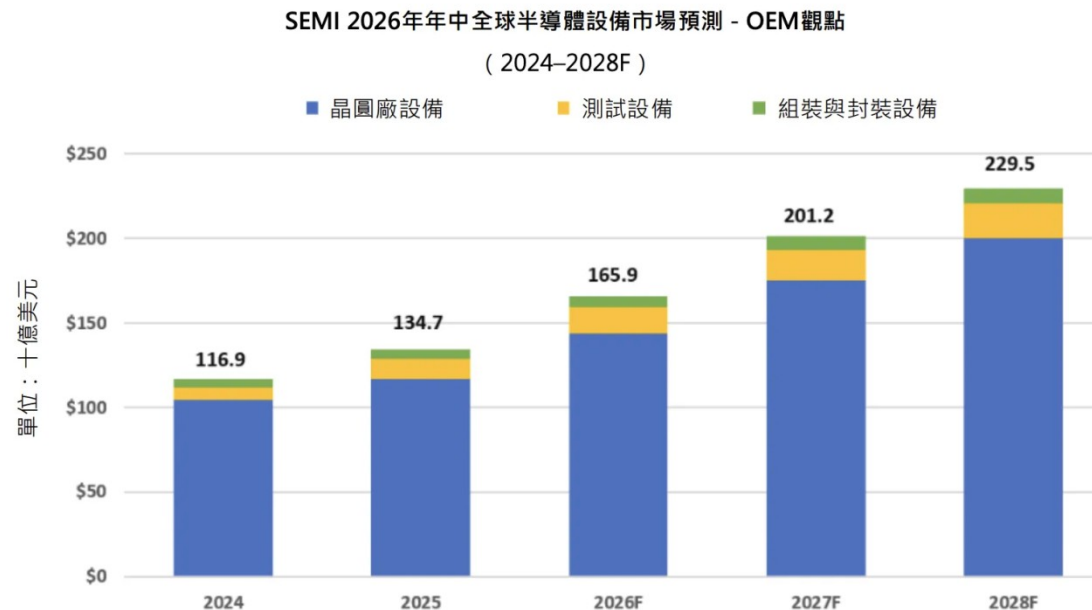
Based on current orders on hand and customer-provided demand forecasts, the Company expects to achieve its 2026 performance targets and exceed 2025 results.

Malaysia Facility

■ Equipment for the machining and chemical-cleaning lines has been installed as scheduled. On-site audits by U.S. customers are ongoing and are expected to be completed in Q4 2026. Upon obtaining qualified-supplier status, the Malaysia subsidiary will be able to accept orders and ship products directly to customers. After obtaining independent order-taking, manufacturing, and shipping qualifications, the Malaysia facility will progressively build local new-product-development capabilities. As global semiconductor-equipment manufacturers continue to expand their presence in Southeast Asia, the facility is positioned to leverage its proximity to customers and pursue additional business opportunities.



Market Growth Drivers – Global Chipmakers Continue to Increase Capital Expenditures on Equipment



資料來源：SEMI 設備市場資料庫 (EMDS) · 2026年7月

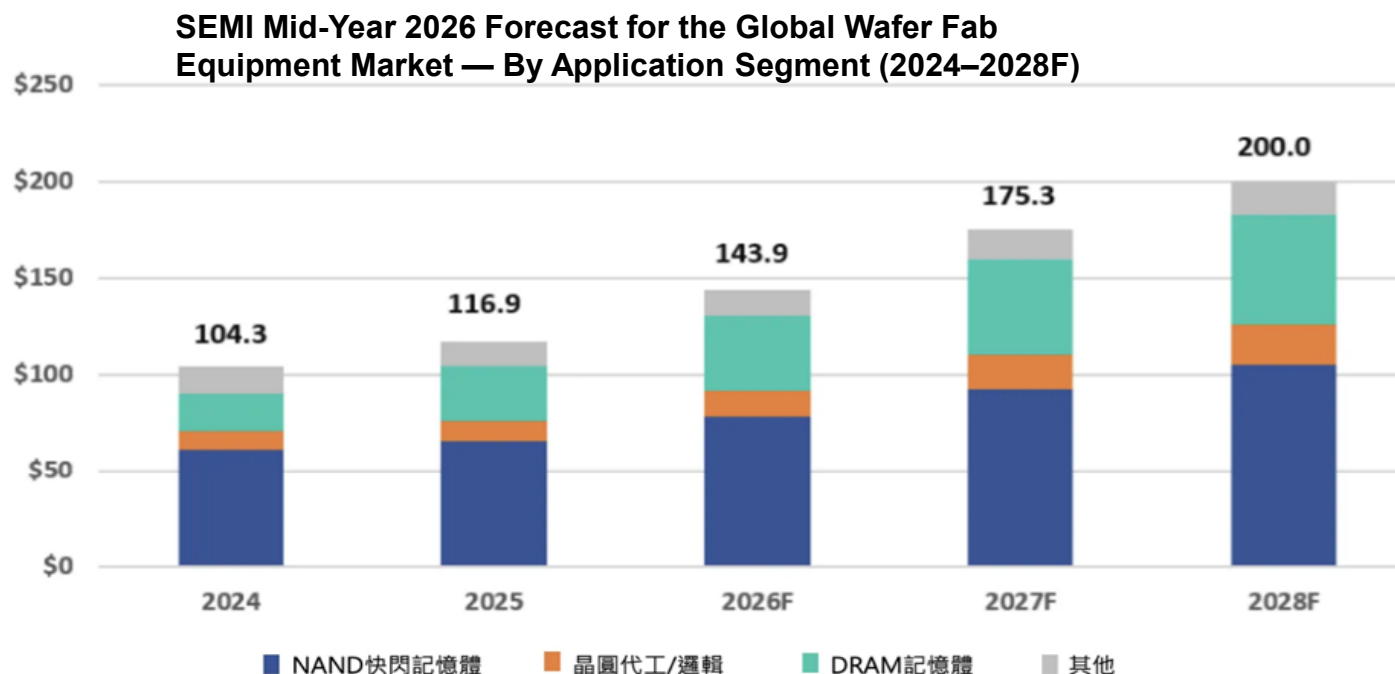
* 總設備市場包含新晶圓廠設備、測試設備及組裝與封裝設備，但不包含晶圓製造設備。

Global semiconductor manufacturing equipment sales are projected to reach **US\$165.9 billion in 2026**, up 23.2% from 2025 and setting a new record high. Driven by sustained AI demand, global semiconductor manufacturing investment momentum is expected to continue through 2028, with equipment sales projected to rise to **US\$229.5 billion**, marking an unprecedented five consecutive years of growth.



Market Growth Drivers

Advances in GAA and HBM Processes Drive WFE Demand



資料來源：SEMI 設備市場資料庫 (EMDS) · 2026年7月

Global **Wafer Fab Equipment (WFE)**—including wafer-processing equipment, mask/reticle equipment, and fab facility equipment—reached a record US\$116.9 billion in sales in 2025. The market is projected to grow a further 23.1% in 2026 to US\$143.9 billion, driven primarily by continued investment in advanced memory, particularly HBM-related DRAM technologies, and advanced logic applications.

As manufacturers accelerate capacity expansion and technology upgrades to address AI-driven demand, the WFE market is forecast to grow by 21.8% and 14.1% in 2027 and 2028, respectively, with the market expected to exceed US\$200 billion by 2028.

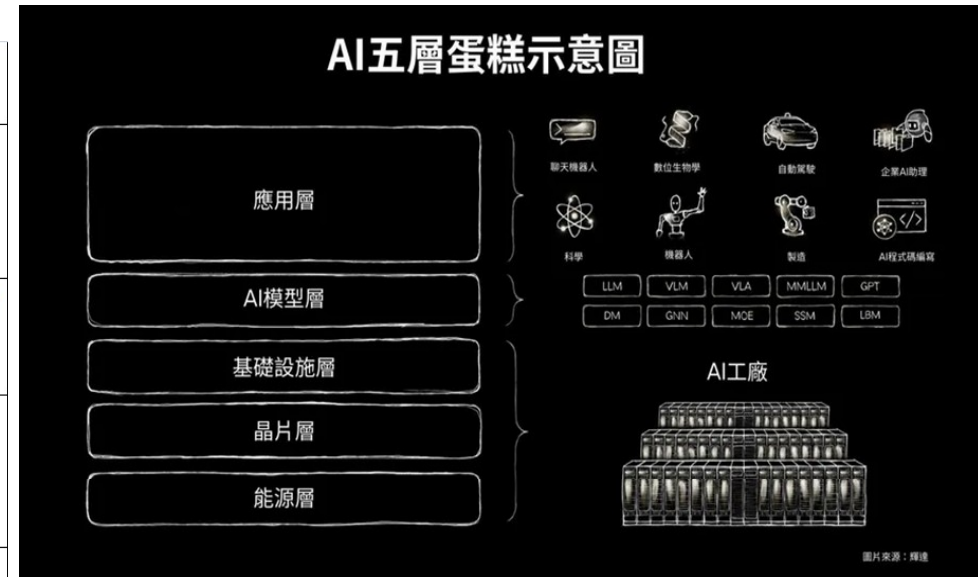


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Market Growth Drivers – “AI Is a Five-Layer Cake” — NVIDIA

NVIDIA AI Five-Layer Cake	Scope	NVIDIA AI Ecosystem Investment Overview
Layer 1: Energy	Data center power supply and energy-storage systems	SB Energy: US\$1.5 billion; NVIDIA provided US\$105 billion in credit support, directly backing AI power generation facilities
Layer 2: Chips	GPUs, ASICs, HBM, and related components	Lumentum / Coherent: US\$4 billion combined; Marvell: US\$2 billion; Enfabrica: over US\$900 million
Layer 3: Infrastructure	Servers, data center construction, cooling systems, high-speed networking, and power transmission systems	CoreWeave: US\$5 billion equity investment; Nebius: US\$2 billion
Layer 4: Models	Development and open-source models for language, biology, chemistry, physics, healthcare, and other	OpenAI: US\$30 billion; xAI: strategic equity investment; investments in Anthropic, Cohere, Perplexity, Mistral, Runway, and
Layer 5: Applications	Software, smart healthcare, drug discovery, autonomous driving, industrial robotics, and enterprise AI assistants	Bright Machines: US\$126 million; Weka: US\$140 million



Source: Nvidia

NVIDIA has committed more than **US\$45 billion** to the AI ecosystem, along with **US\$105 billion** in credit and residual-value guarantees to support the construction of AI power plants.



2026 H2 Operating Outlook

1. Market and Technology Growth Drivers

1-1. AI-Driven Semiconductor Demand

Global semiconductor market development is increasingly centered on AI-related applications. Demand is rapidly evolving from generative AI toward agentic AI, edge AI, and physical AI, driving continued growth in demand for high-performance computing (HPC), advanced-node logic chips, and HBM memory.

1-2. Sustained Equipment Investment

Driven by continued AI demand, global semiconductor manufacturing investment momentum is expected to extend through 2028. Equipment sales are projected to rise to **US\$229.5 billion**, marking a record five consecutive years of growth.

2. Opportunities and Risks

2-1. Supply Chain Lead-Time Delays

The Middle East conflict has significantly extended lead times for certain materials, potentially affecting equipment manufacturers' delivery schedules and directly creating a risk of delays in the start-up of new fab facilities.

2-2. Geopolitical Tensions and Tightening Export Controls

Risks from technology competition and export restrictions persist. In particular, policy uncertainty surrounding advanced extreme ultraviolet (EUV) lithography and advanced deposition/etch equipment continues to affect the proportion of sales by European and U.S. semiconductor-equipment suppliers in China, as well as global supply-chain deployment strategies.

2-3. Power and Energy Infrastructure Constraints

The rapid expansion of global AI data centers is straining electricity supply and power-grid capacity in many countries and regions. If power infrastructure cannot keep pace with AI server deployment, it could indirectly slow the expansion of AI-related investments.



Thanks You!



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