

# ASE Inc.

## Q4 2011

### Earnings Release

Presented by

Tien Wu  
Chief Operating Officer  
Feb 10, 2012

# Safe Harbor Notice

This presentation contains "forward-looking statements" within the meaning of Section 27A of the United States Securities Act of 1933, as amended, and Section 21E of the United States Securities Exchange Act of 1934, as amended, including statements regarding our future results of operations and business prospects. Although these forward-looking statements, which may include statements regarding our future results of operations, financial condition or business prospects, are based on our own information and information from other sources we believe to be reliable, you should not place undue reliance on these forward-looking statements, which apply only as of the date of this presentation. The words "anticipate", "believe", "estimate", "expect", "intend", "plan" and similar expressions, as they relate to us, are intended to identify these forward-looking statements in this presentation. Our actual results of operations, financial condition or business prospects may differ materially from those expressed or implied in these forward-looking statements for a variety of reasons, including risks associated with cyclicity and market conditions in the semiconductor industry; demand for the outsourced semiconductor packaging and testing services we offer and for such outsourced services generally; the highly competitive semiconductor industry; our ability to introduce new packaging, interconnect materials and testing technologies in order to remain competitive; our ability to successfully integrate pending and future mergers and acquisitions; international business activities; our business strategy; general economic and political conditions, including the recent global financial crisis; possible disruptions in commercial activities caused by natural or human-induced disasters; our future expansion plans and capital expenditures; the strained relationship between the Republic of China and the People's Republic of China; fluctuations in foreign currency exchange rates; and other factors. For a discussion of these risks and other factors, please see the documents we file from time to time with the Securities and Exchange Commission, including our 2010 Annual Report on Form 20-F filed on June 17, 2011.

# 2011 Accomplishments & Challenges



## Accomplishments

- **Outperformed semiconductor industry and SATS competitors**
- **Copper wirebonding leadership**
- **Low pin and discrete ramp-up**
- **Continued growth in advanced packages**

## Challenges

- **March Tsunami in Japan**
- **July US-debt ceiling crisis**
- **September Euro crisis**
- **October Thailand flooding**
- **IDM in-sourcing, Japan absence**



# 2011 Accomplishments



## Outperformed semiconductor industry and SATS competitors

(US\$ Bn)	2008	2009	2010	2011
<b>Semiconductor Industry</b>	<b>255</b>	<b>229</b>	<b>299</b>	<b>302</b>
Growth	-5.3%	-10.4%	30.9%	0.9%
<b>SATS Industry</b>	<b>20.1</b>	<b>17.1</b>	<b>23.6</b>	<b>24.0</b>
Growth	-2.4%	-14.7%	37.6%	1.8%
<b>ASE IC ATM Revenue</b>	<b>3.02</b>	<b>2.61</b>	<b>3.99</b>	<b>4.35</b>
Growth	-2.3%	-13.5%	52.9%	9.1%
<b>Market Share</b>	<b>15.0%</b>	<b>15.2%</b>	<b>16.9%</b>	<b>18.1%</b>
<b>Combined Revenue of #2, #3, and #4 SATS Companies</b>	<b>6.23</b>	<b>5.23</b>	<b>6.72</b>	<b>6.50</b>
Growth	-2.3%	-16.0%	28.4%	-3.3%
<b>Market Share</b>	<b>31.0%</b>	<b>30.5%</b>	<b>28.5%</b>	<b>27.1%</b>

Source: Gartner, December 2011 and public company filing

Note: Revenues of individual SATS companies are based on public company information and mid-points of official guidance



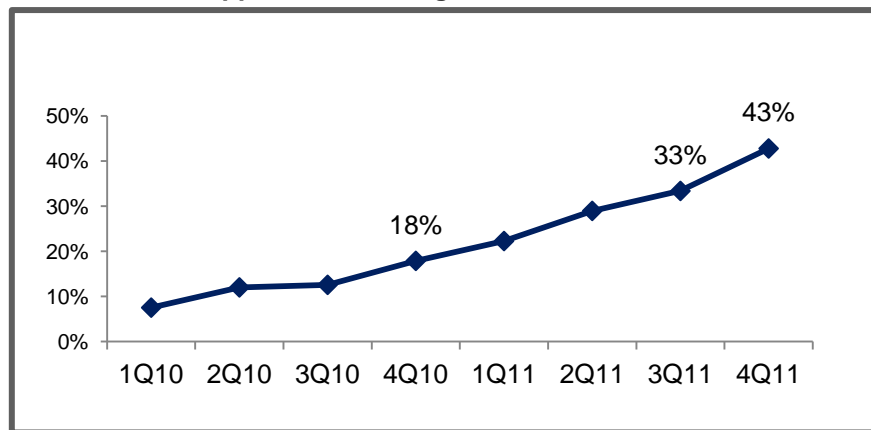
# 2011 Accomplishments

## Copper wirebonding leadership

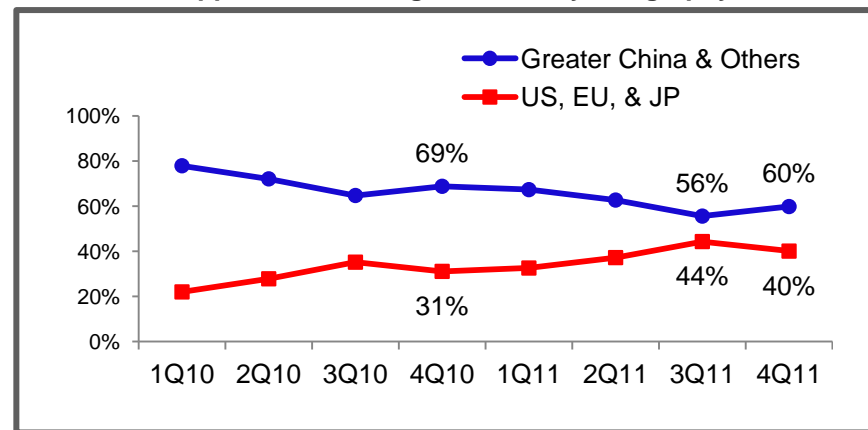
Copper Wirebonding Revenue



Copper Wirebonding Conversion Rate



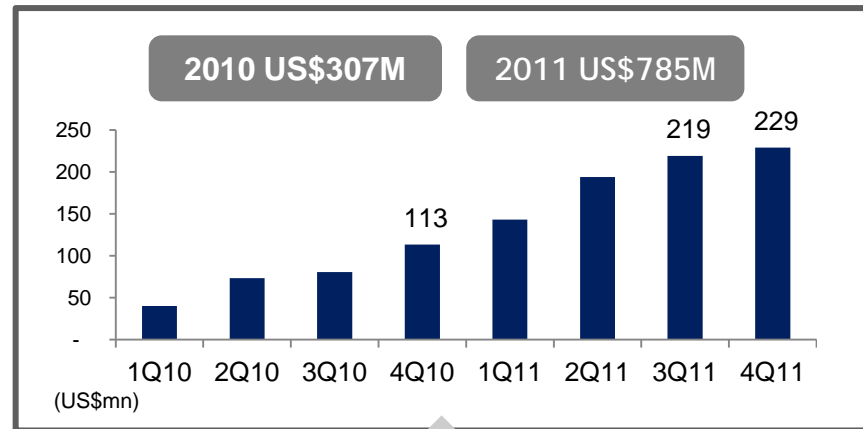
Copper Wirebonding Revenue By Geography



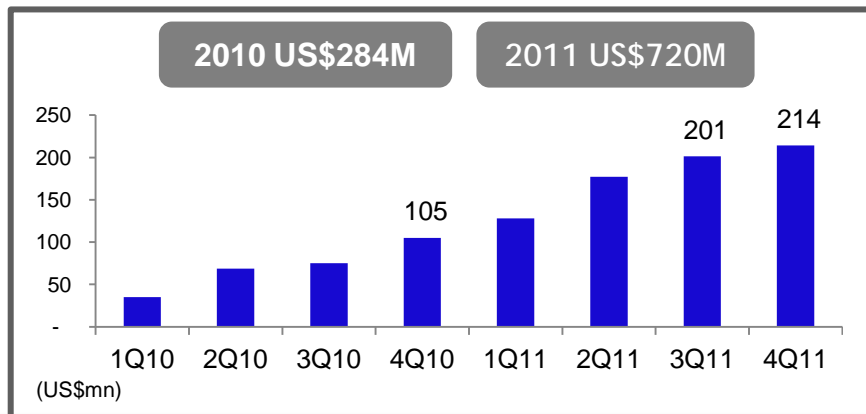
# 2011 Accomplishments

## Copper wirebonding growth with IDM vs. Fabless

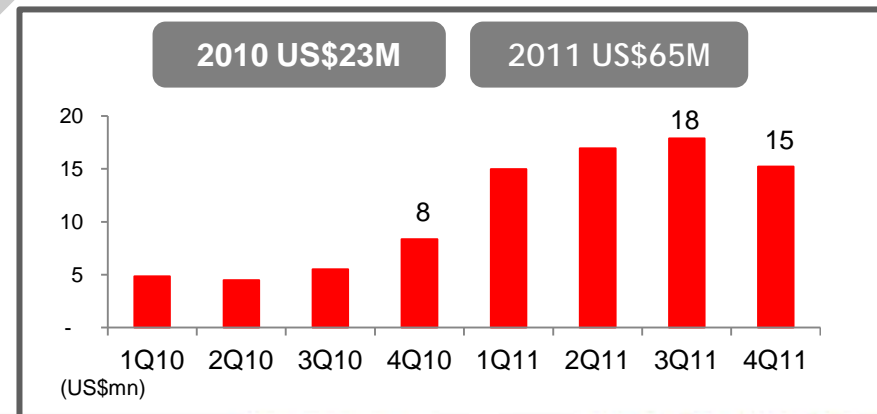
Copper Wirebonding Revenue



Copper Wirebonding Revenue From Fabless Customers



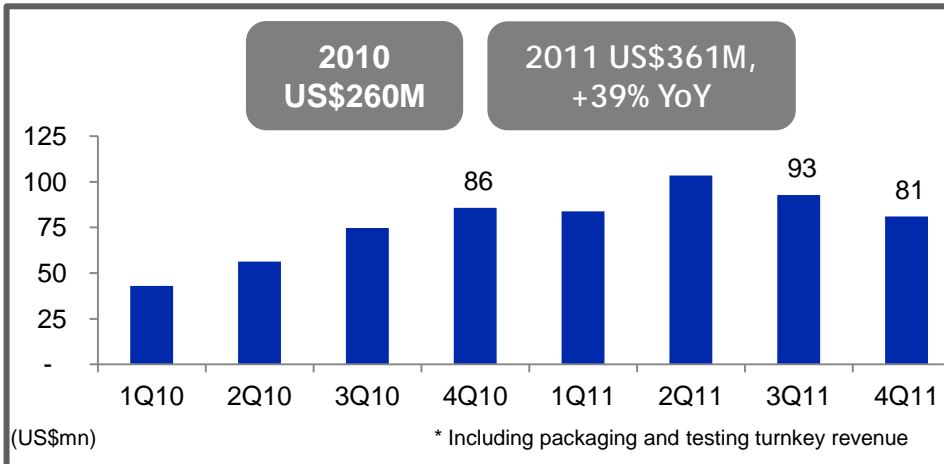
Copper Wirebonding Revenue From IDM Customers



# 2011 Accomplishments

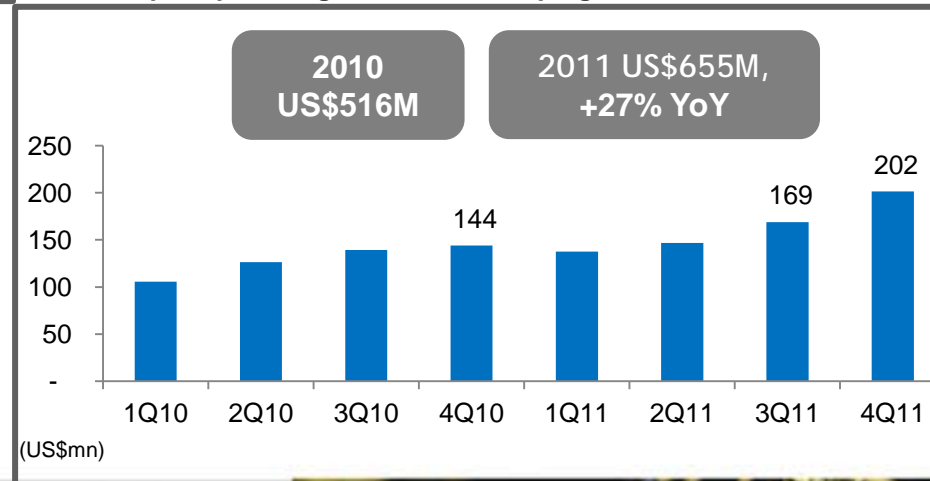
## Low pin and discrete ramp-up

Low pin and Discrete Revenue

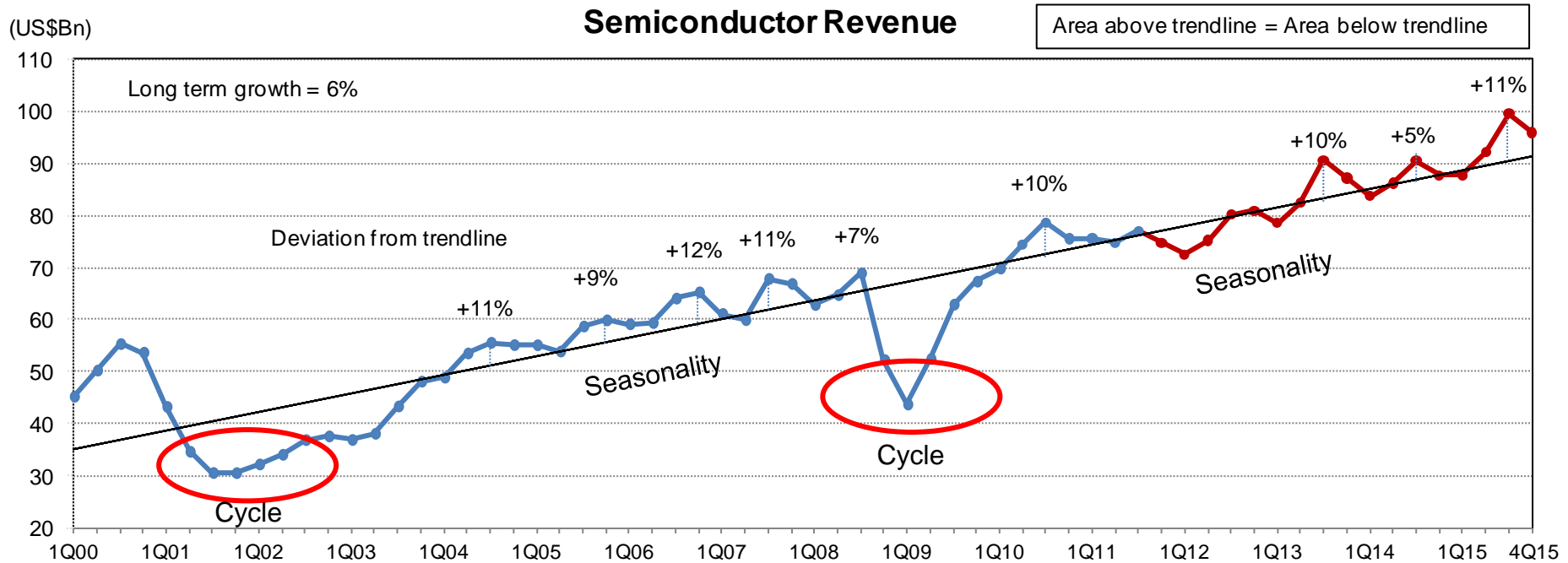


## Growth in advanced packages

Flip Chip Packages & Wafer Bumping Services Revenue



# Semiconductor Cycle vs. Seasonality

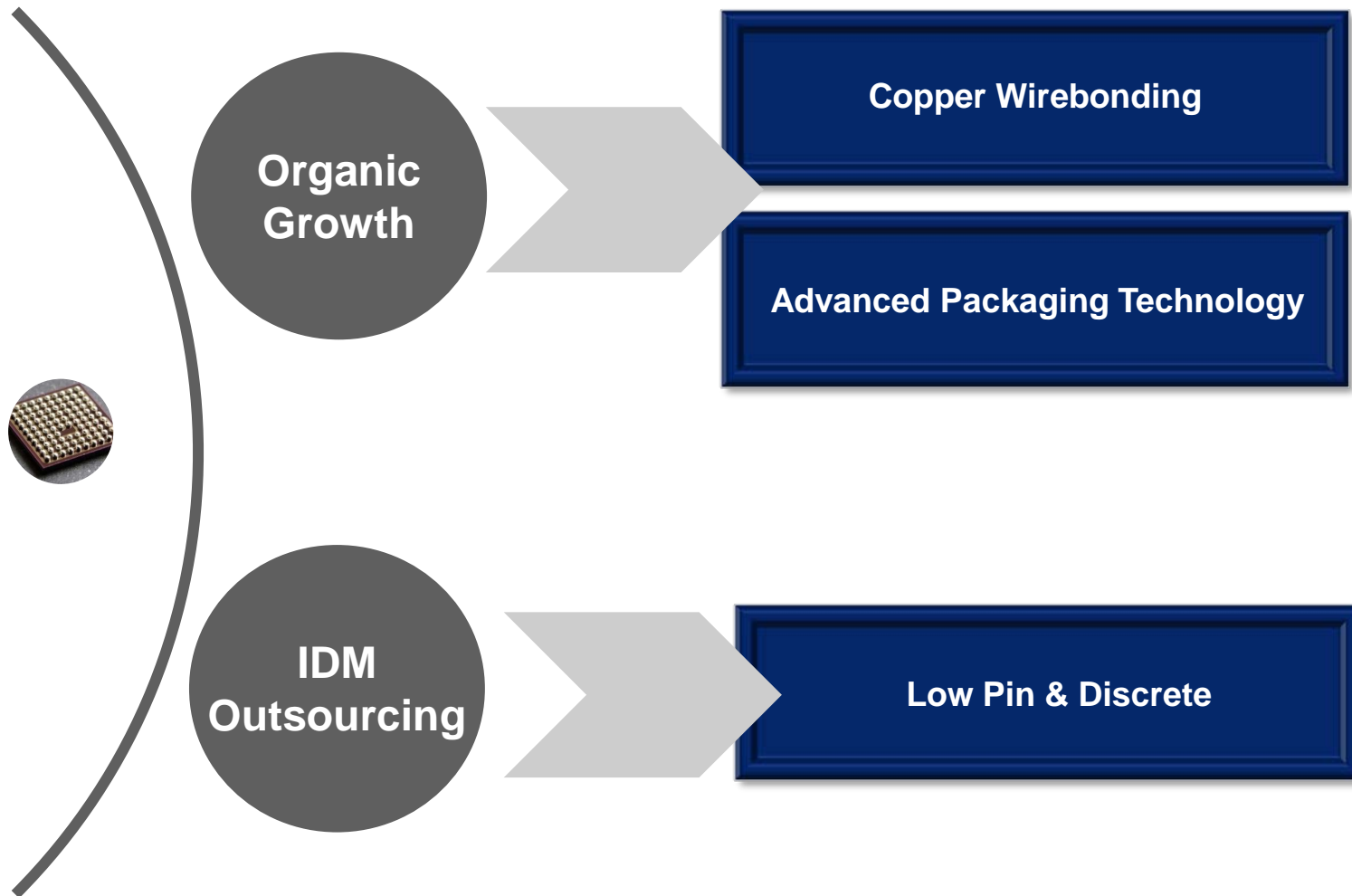


US\$Bn	2011	2012	2013	2014	2015
Semiconductor Revenue	302	309	339	348	375
YoY Growth	0.9%	2.2%	9.7%	2.8%	7.7%

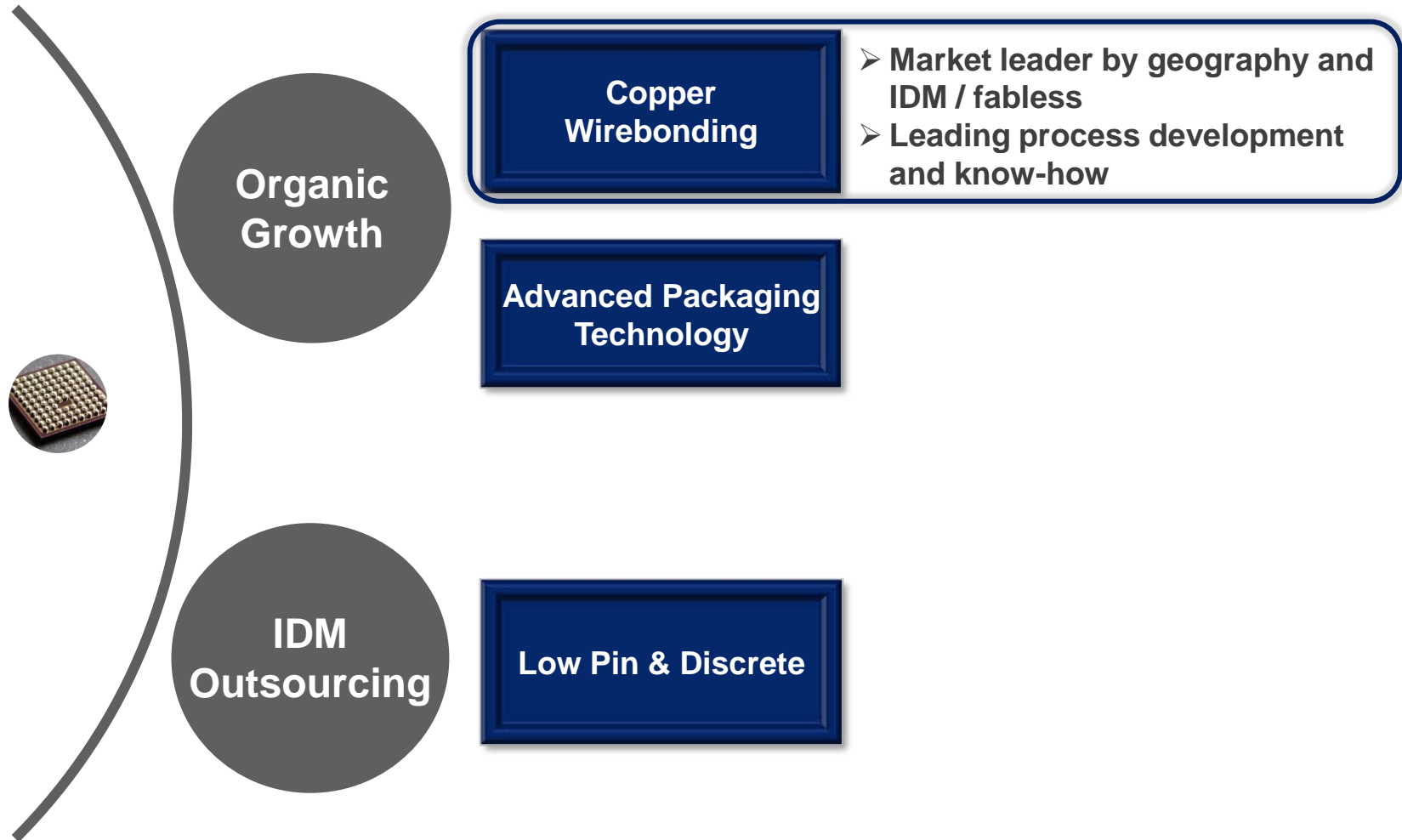
Source: WSTS and Gartner, December 2011



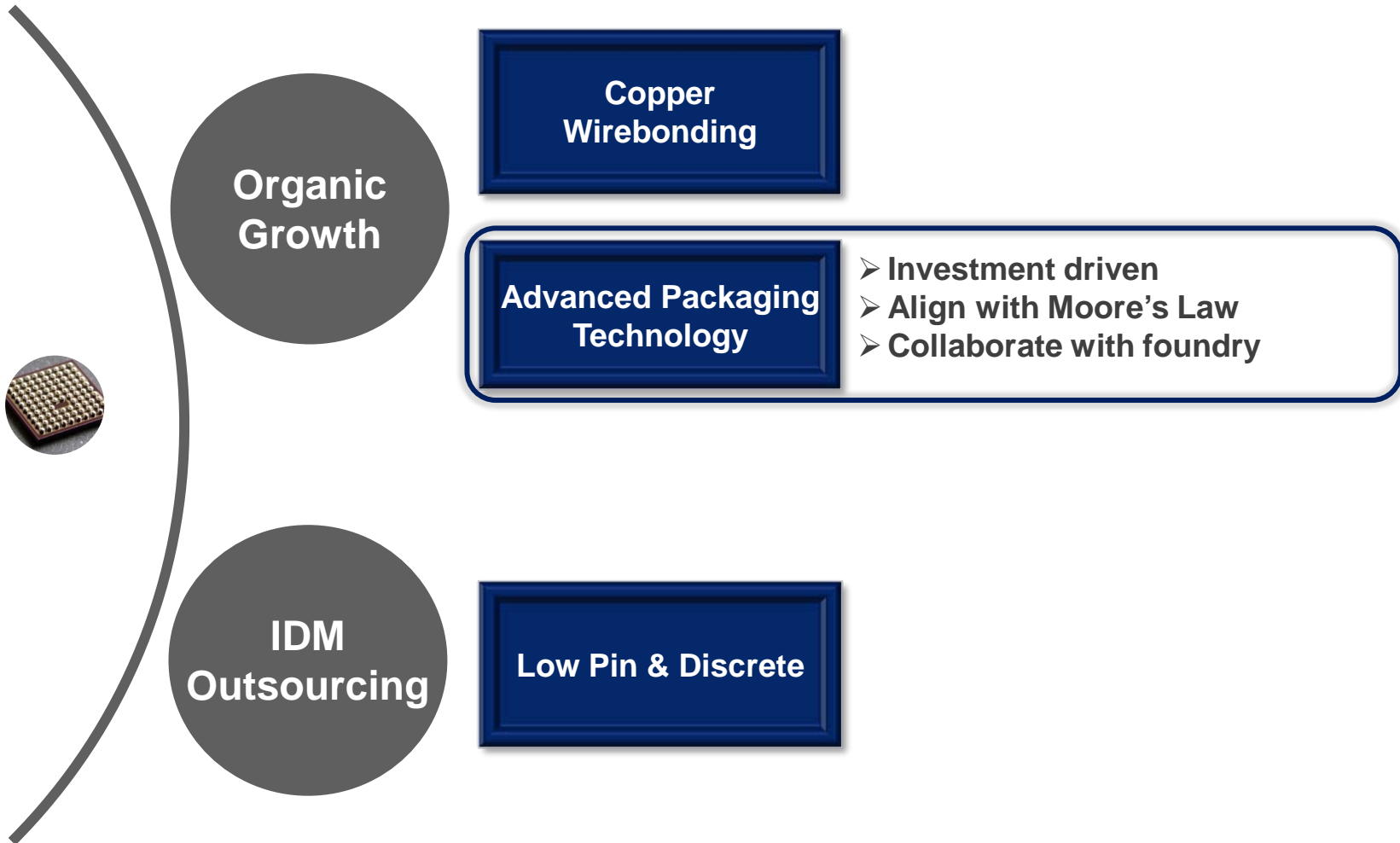
# Key Business Drivers



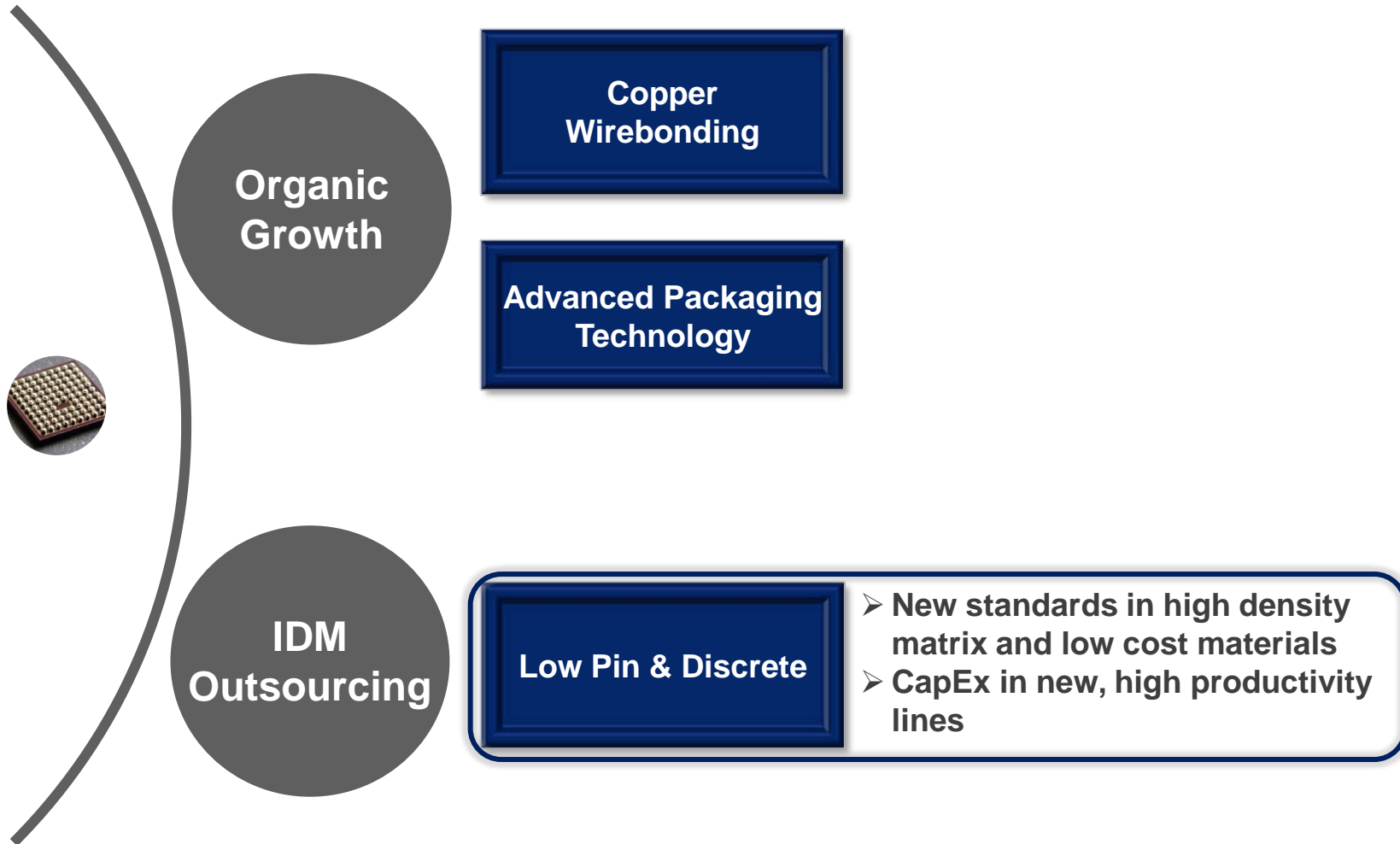
# Key Business Drivers



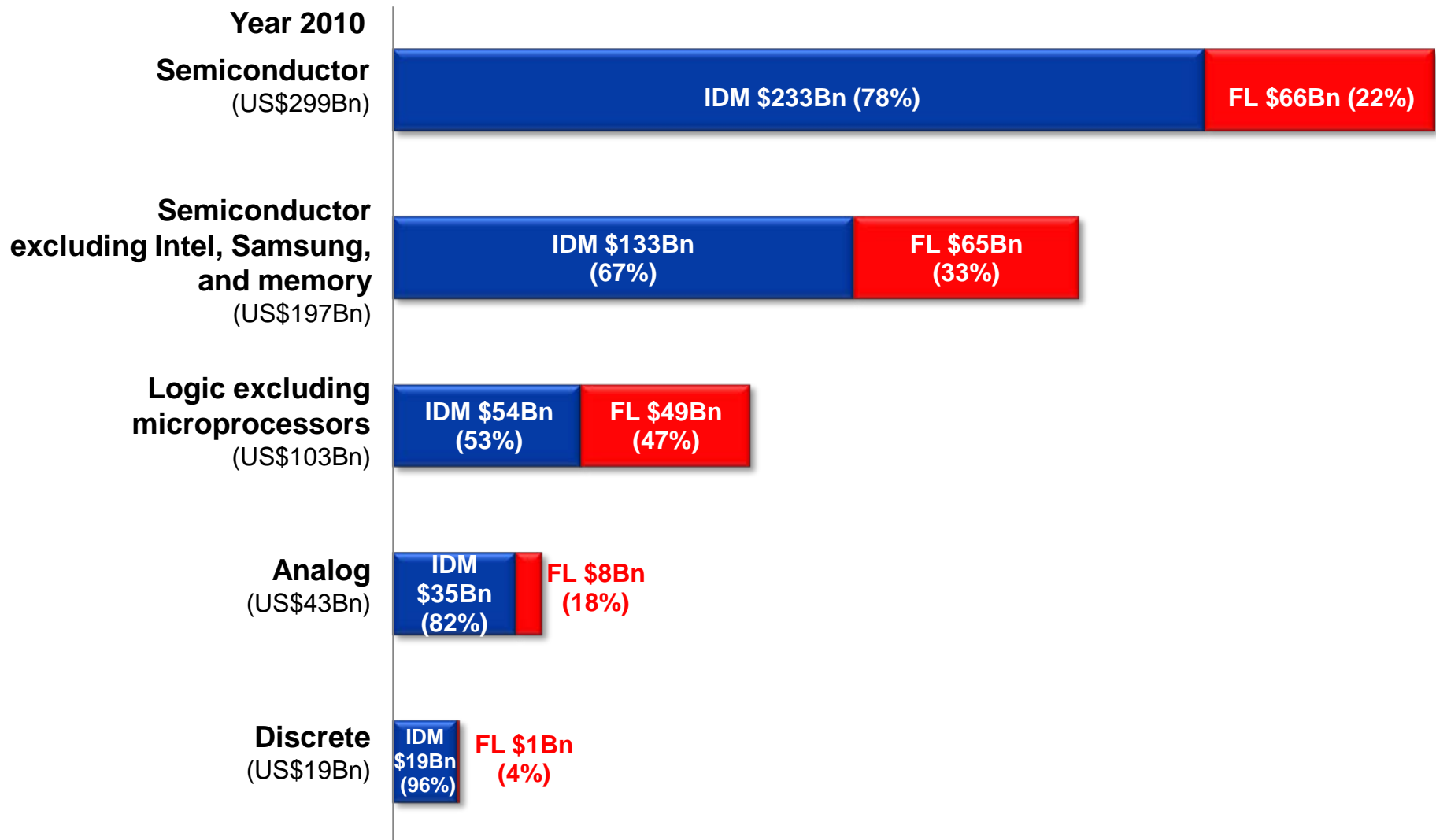
# Key Business Drivers



# Key Business Drivers



# IDM vs. Fabless Landscape



Source: Gartner, June 2011 & NVR, 2011 Edition

Notes: (1) Logic includes general purpose logic, application specific logic, and microcontrollers.

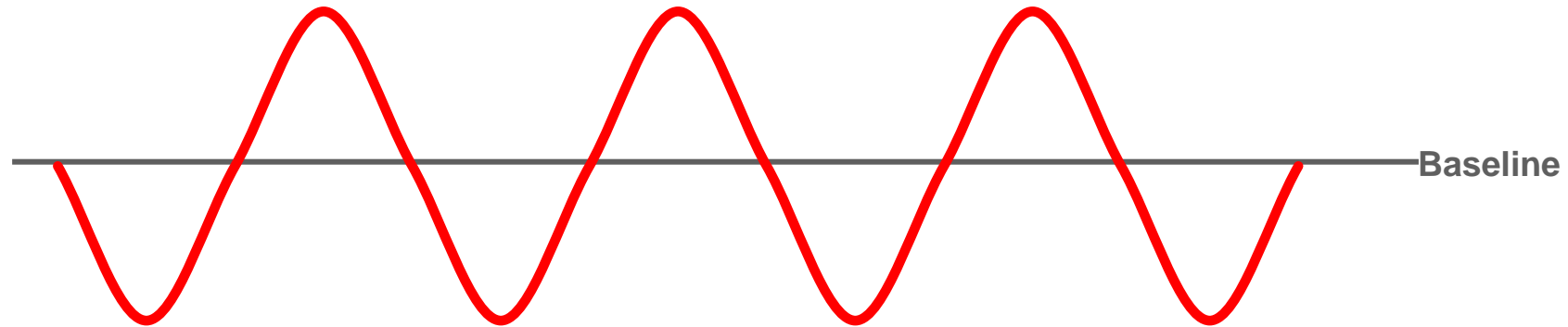
(2) Analog includes general purpose analog and application specific analog.

(3) Discrete includes transistors, diodes, and other discrete.

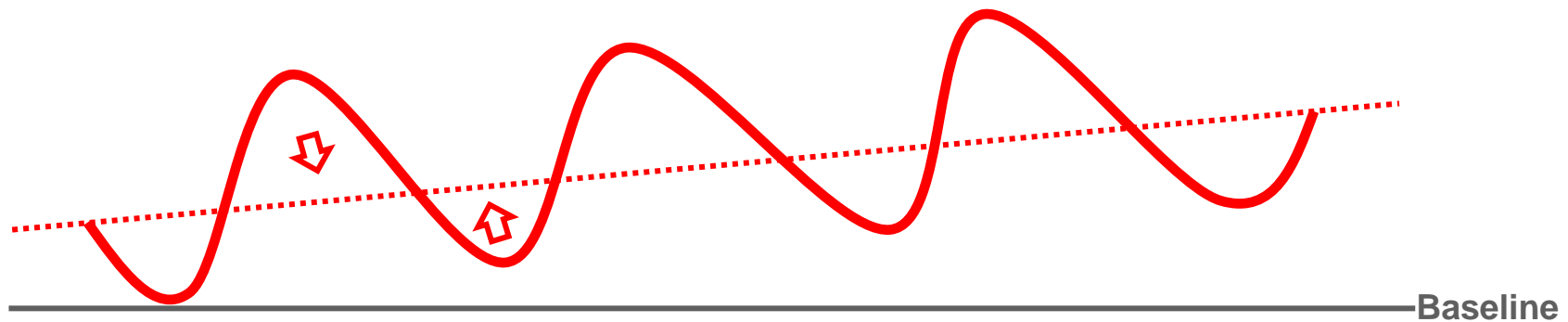


# Embracing IDM Outsourcing

## Traditional Business Model of IDM OS

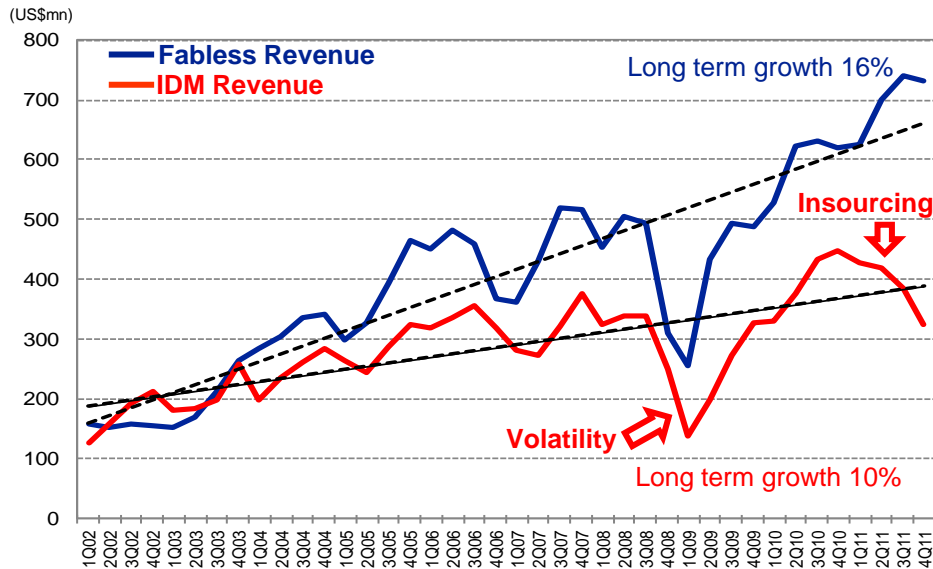


## Ideal Business Model of IDM OS Enabled By Technology, Cost & Service

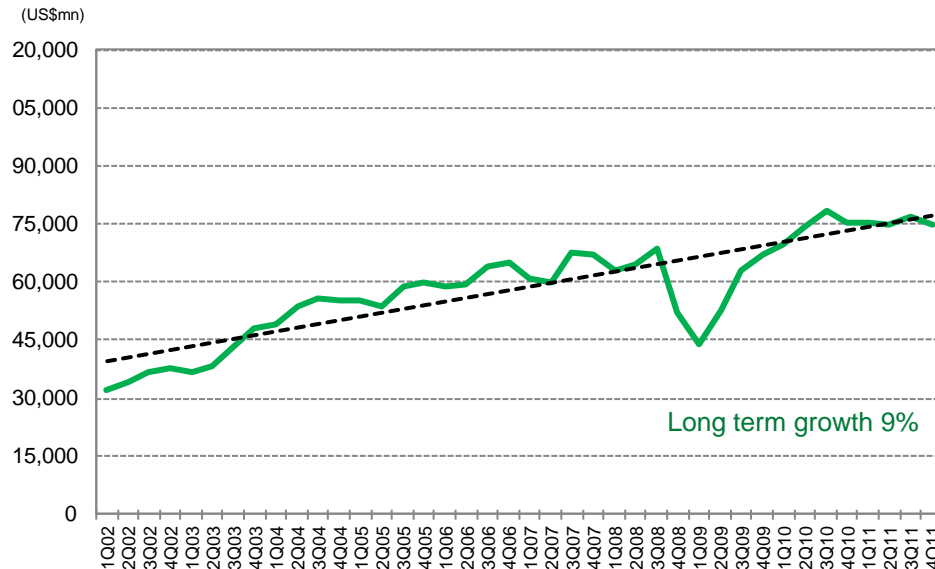


# IDM Revenue

## ASE IC ATM Revenue



## Semiconductor Revenue



**Demand cyclicality**  
**Investment cycle and constraint**  
**JV and M&A possibilities**

**Embracing**  
**IDM**  
**Outsourcing**

**Technology**  
**Cost**  
**Full spectrum services**



For more information regarding ASE Group

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ASE Inc.  
Q4 2011  
Earnings Release

Presented by

Joseph Tung  
CFO/VP  
Feb. 10, 2012



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# IC ATM Consolidated Income Statement

Sequential Comparison



(NT\$ Million except EPS)	Q4 / 2011	%	Q3 / 2011	%	Change
<b>Net Revenues:</b>					
IC Packaging	25,557	80.1%	26,344	80.9%	-3%
Testing	5,603	17.6%	5,498	16.9%	2%
Direct Material	668	2.1%	645	2.0%	4%
EMS	80	0.3%	94	0.3%	-15%
<b>Total Net Revenues</b>	<b>31,908</b>	<b>100.0%</b>	<b>32,581</b>	<b>100.0%</b>	<b>-2%</b>
<b>Gross Profit</b>	<b>6,790</b>	<b>21.3%</b>	<b>7,319</b>	<b>22.5%</b>	<b>-7%</b>
<b>Operating Income(Loss)</b>	<b>3,156</b>	<b>9.9%</b>	<b>3,866</b>	<b>11.9%</b>	<b>-18%</b>
<b>Pretax Income(Loss)</b>	<b>2,937</b>	<b>9.2%</b>	<b>4,004</b>	<b>12.3%</b>	<b>-27%</b>
<b>Income Tax Benefit(Expense)</b>	<b>(329)</b>	<b>-1.0%</b>	<b>(523)</b>	<b>-1.6%</b>	
<b>Minority Interest</b>	<b>31</b>	<b>0.1%</b>	<b>(13)</b>	<b>0.0%</b>	
<b>Net Income(Loss)</b>	<b>2,639</b>	<b>8.3%</b>	<b>3,468</b>	<b>10.6%</b>	<b>-24%</b>
<b>EPS<sup>1</sup></b>	<b>0.40</b>		<b>0.52</b>		
<b>EBITDA</b>	<b>8,861</b>	<b>27.8%</b>	<b>9,437</b>	<b>29.0%</b>	<b>-6%</b>

<sup>1</sup> All EPS figures are based on fully diluted number of shares



# IC ATM Consolidated Income Statement



YoY Comparison

(NT\$ Million except EPS)	Q4 / 2011	%	Q4 / 2010	%	Change
<b>Net Revenues:</b>					
IC Packaging	25,557	80.1%	26,025	79.8%	-2%
Testing	5,603	17.6%	5,994	18.4%	-7%
Direct Material	668	2.1%	583	1.8%	15%
EMS	80	0.3%	0	0.0%	
<b>Total Net Revenues</b>	<b>31,908</b>	<b>100.0%</b>	<b>32,602</b>	<b>100.0%</b>	<b>-2%</b>
<b>Gross Profit</b>	<b>6,790</b>	<b>21.3%</b>	<b>8,211</b>	<b>25.2%</b>	<b>-17%</b>
<b>Operating Income(Loss)</b>	<b>3,156</b>	<b>9.9%</b>	<b>4,979</b>	<b>15.3%</b>	<b>-37%</b>
<b>Pretax Income(Loss)</b>	<b>2,937</b>	<b>9.2%</b>	<b>5,652</b>	<b>17.3%</b>	<b>-48%</b>
<b>Income Tax Benefit(Expense)</b>	<b>(329)</b>	<b>-1.0%</b>	<b>(655)</b>	<b>-2.0%</b>	
<b>Minority Interest</b>	<b>31</b>	<b>0.1%</b>	<b>(127)</b>	<b>-0.4%</b>	
<b>Net Income(Loss)</b>	<b>2,639</b>	<b>8.3%</b>	<b>4,870</b>	<b>14.9%</b>	<b>-46%</b>
<b>EPS<sup>1</sup></b>	<b>0.40</b>		<b>0.72</b>		
<b>EBITDA</b>	<b>8,861</b>	<b>27.8%</b>	<b>10,061</b>	<b>30.9%</b>	<b>-12%</b>

<sup>1</sup> All EPS figures are based on fully diluted number of shares



# IC ATM Consolidated Income Statement



Full Year Comparison  
NT\$ Million

(NT\$ Million except EPS)	Full Year / 2011	%	Full Year / 2010	%	Change
<b>Net Revenues:</b>					
IC Packaging	102,747	80.5%	101,119	80.4%	2%
Testing	21,946	17.2%	21,962	17.5%	0%
Direct Material	2,678	2.1%	2,656	2.1%	1%
EMS	252	0.2%	0	0.0%	
<b>Total Net Revenues</b>	<b>127,623</b>	<b>100.0%</b>	<b>125,737</b>	<b>100.0%</b>	<b>1%</b>
<b>Gross Profit</b>	<b>28,738</b>	<b>22.5%</b>	<b>32,064</b>	<b>25.5%</b>	<b>-10%</b>
<b>Operating Income(Loss)</b>	<b>15,328</b>	<b>12.0%</b>	<b>20,054</b>	<b>15.9%</b>	<b>-24%</b>
<b>Pretax Income(Loss)</b>	<b>16,297</b>	<b>12.8%</b>	<b>20,971</b>	<b>16.7%</b>	<b>-22%</b>
<b>Income Tax Benefit(Expense)</b>	<b>(2,330)</b>	<b>-1.8%</b>	<b>(2,171)</b>	<b>-1.7%</b>	
<b>Minority Interest</b>	<b>(241)</b>	<b>-0.2%</b>	<b>(462)</b>	<b>-0.4%</b>	
<b>Net Income(Loss)</b>	<b>13,726</b>	<b>10.8%</b>	<b>18,338</b>	<b>14.6%</b>	<b>-25%</b>
<b>EPS<sup>1</sup> (NT\$)</b>	<b>2.03</b>		<b>2.73</b>		
<b>EBITDA</b>	<b>38,377</b>	<b>30.1%</b>	<b>38,379</b>	<b>30.5%</b>	<b>0%</b>

<sup>1</sup> All EPS figures are based on fully diluted number of shares



# IC ATM Consolidated Income Statement



Full Year Comparison

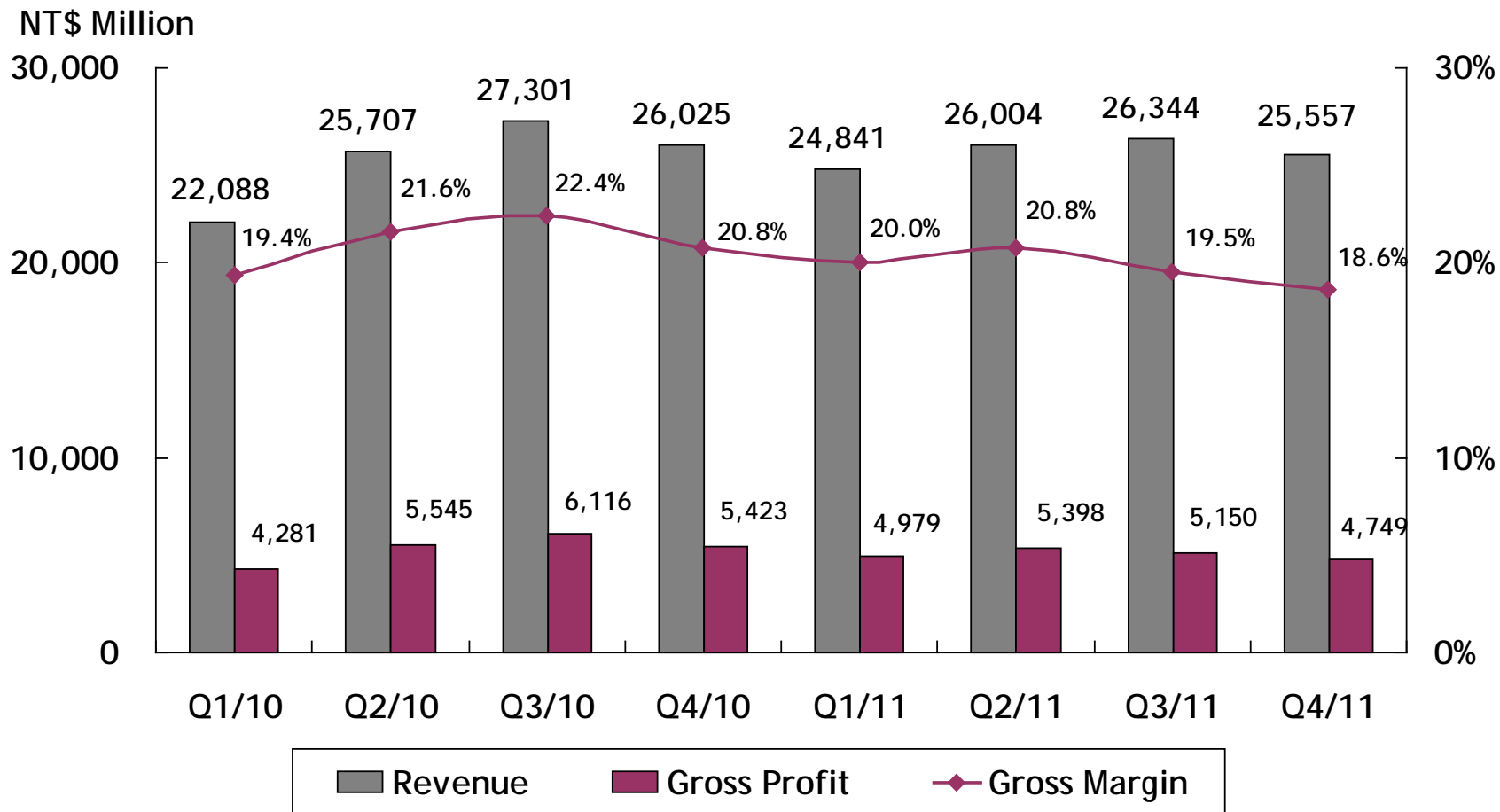
US\$ Million

(US\$ Million except EPS)	Full Year / 2011	%	Full Year / 2010	%	Change
<b>Net Revenues:</b>					
IC Packaging	3,504	80.5%	3,207	80.4%	9%
Testing	748	17.2%	697	17.5%	7%
Direct Material	91	2.1%	84	2.1%	8%
EMS	9	0.2%	0	0.0%	
<b>Total Net Revenues</b>	<b>4,352</b>	<b>100.0%</b>	<b>3,988</b>	<b>100.0%</b>	<b>9%</b>
<b>Gross Profit</b>	<b>980</b>	<b>22.5%</b>	<b>1,017</b>	<b>25.5%</b>	<b>-4%</b>
<b>Operating Income(Loss)</b>	<b>524</b>	<b>12.0%</b>	<b>636</b>	<b>15.9%</b>	<b>-18%</b>
<b>Pretax Income(Loss)</b>	<b>557</b>	<b>12.8%</b>	<b>665</b>	<b>16.7%</b>	<b>-16%</b>
<b>Income Tax Benefit(Expense)</b>	<b>(80)</b>	<b>-1.8%</b>	<b>(69)</b>	<b>-1.7%</b>	
<b>Minority Interest</b>	<b>(8)</b>	<b>-0.2%</b>	<b>(14)</b>	<b>-0.4%</b>	
<b>Net Income(Loss)</b>	<b>469</b>	<b>10.8%</b>	<b>582</b>	<b>14.6%</b>	<b>-19%</b>
<b>EPS<sup>1</sup> (NT\$)</b>	<b>2.03</b>		<b>2.73</b>		
<b>EBITDA</b>	<b>1,310</b>	<b>30.1%</b>	<b>1,217</b>	<b>30.5%</b>	<b>8%</b>

<sup>1</sup> All EPS figures are based on fully diluted number of shares

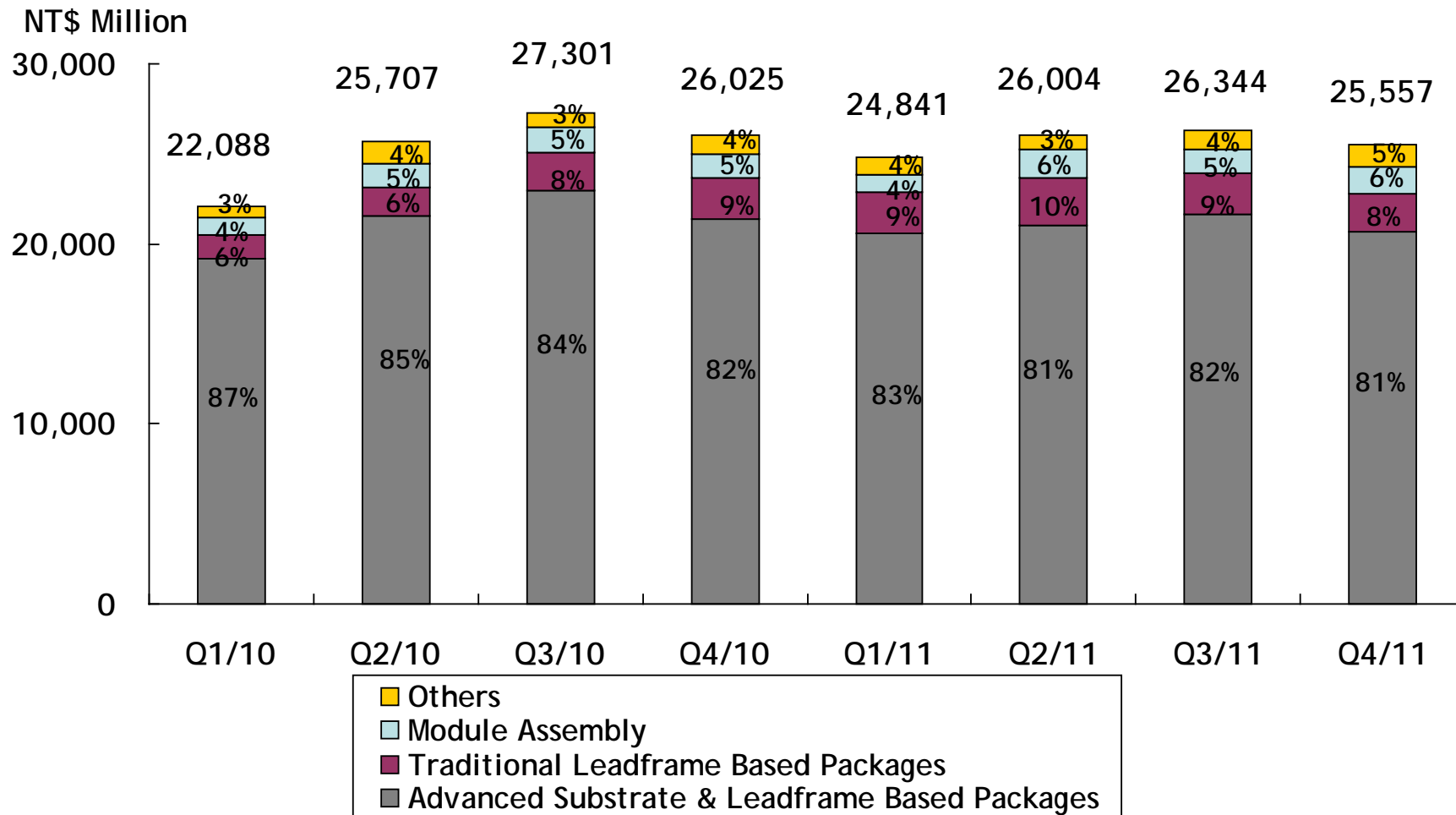


# IC Packaging Operations



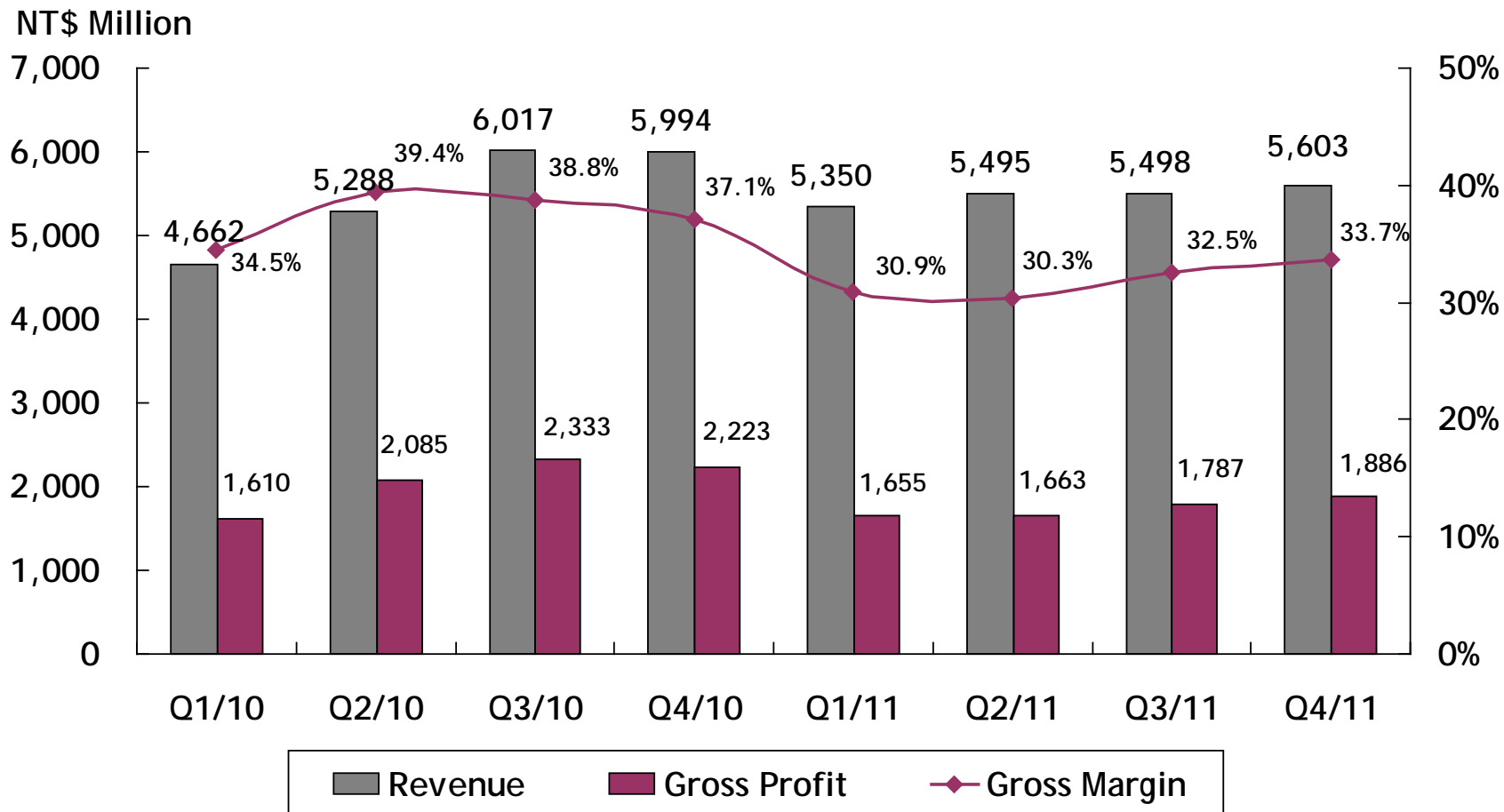
# IC Packaging Operations

## Package Revenue Breakdown



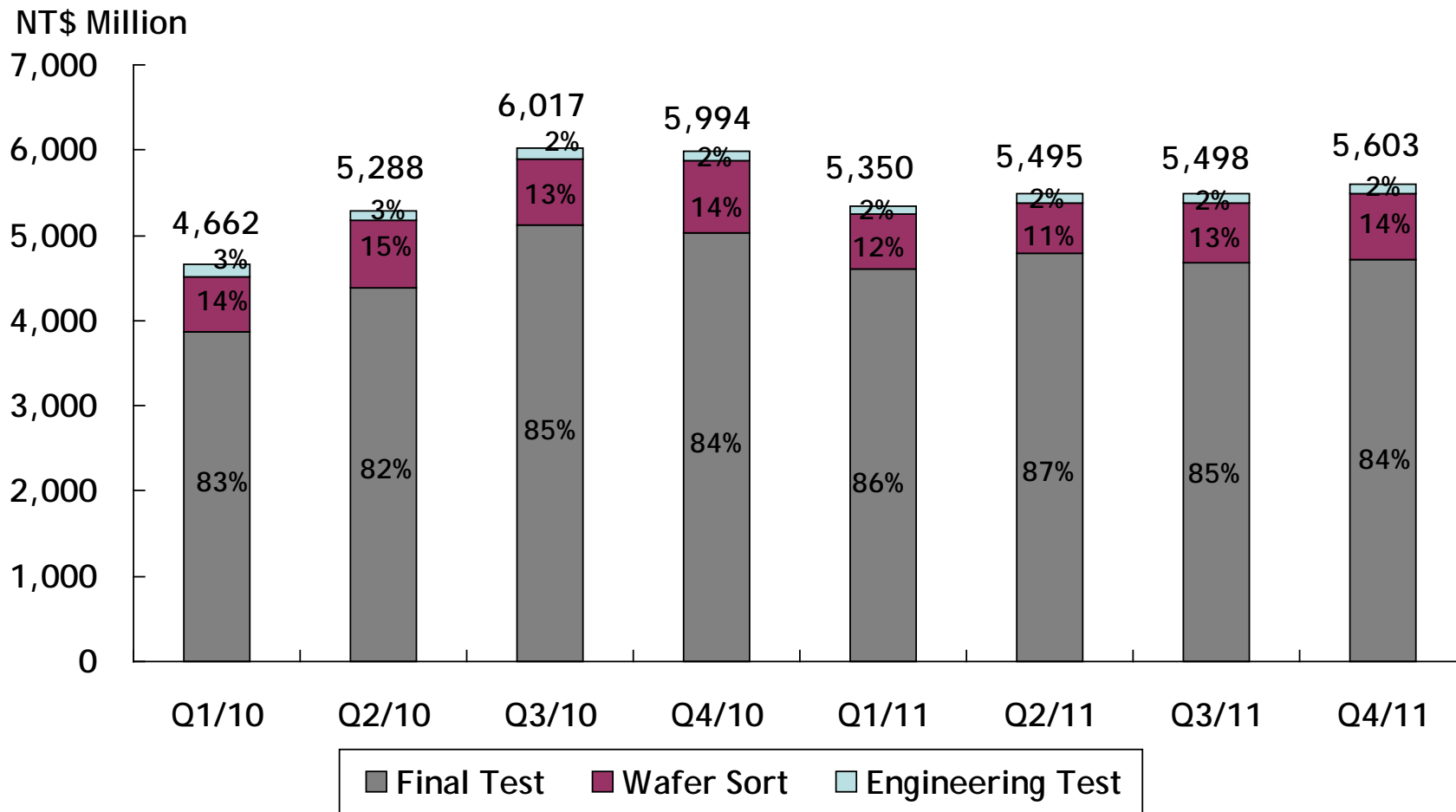


# IC Testing Operations

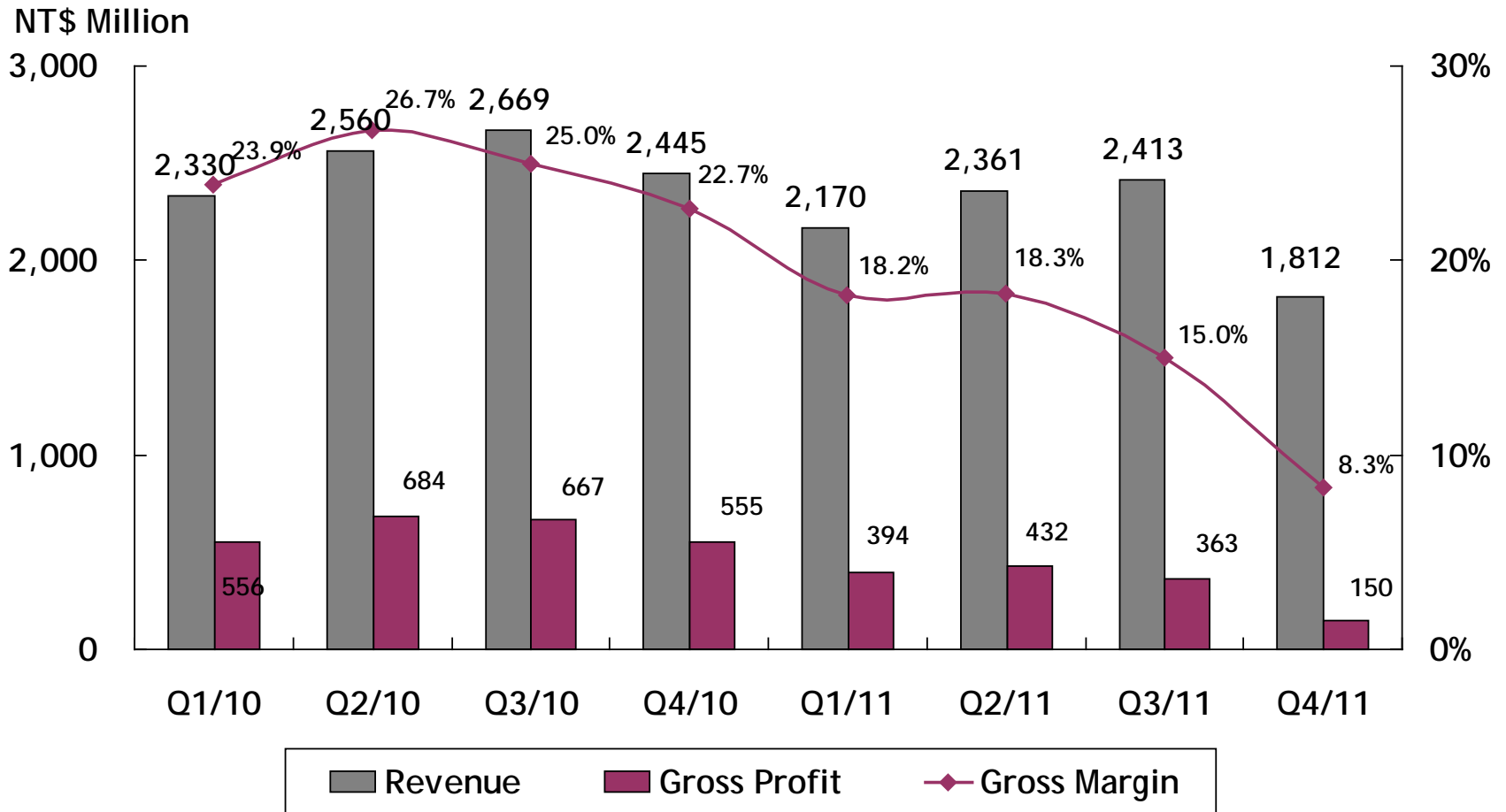


# IC Testing Operations

## Test Revenue Breakdown



# Material Operations



# USI Consolidated Income Statement

Sequential Comparison



(NT\$ Million)	Q4 / 2011	%	Q3 / 2011	%	Change
<b>Net Revenues:</b>					
Total Net Revenues	14,447	100.0%	14,116	100.0%	2%
Gross Profit	1,780	12.3%	1,718	12.2%	4%
Operating Income(Loss)	485	3.4%	605	4.3%	-20%
Pretax Income(Loss)	600	4.2%	690	4.9%	-13%
Income Tax Benefit(Expense)	(7)	0.0%	(194)	-1.4%	
Minority Interest	(6)	0.0%	(5)	0.0%	
Net Income(Loss)	587	4.1%	491	3.5%	20%
EBITDA	964	6.7%	992	7.0%	-3%



# USI Consolidated Income Statement

YoY Comparison



(NT\$ Million)	Q4 / 2011	%	Q4 / 2010	%	Change
<b>Net Revenues:</b>					
Total Net Revenues	14,447	100.0%	17,228	100.0%	-16%
Gross Profit	1,780	12.3%	1,804	10.5%	-1%
Operating Income(Loss)	485	3.4%	671	3.9%	-28%
Pretax Income(Loss)	600	4.2%	632	3.7%	-5%
Income Tax Benefit(Expense)	(7)	0.0%	(219)	-1.3%	
Minority Interest	(6)	0.0%	(2)	0.0%	
Net Income(Loss)	587	4.1%	411	2.4%	43%
EBITDA	964	6.7%	912	5.3%	6%



# USI Consolidated Income Statement

Full Year Comparison



(NT\$ Million)	FY / 2011	%	FY / 2010	%	Change
<b>Net Revenues:</b>					
Total Net Revenues	57,645	100.0%	63,946	100.0%	-10%
Gross Profit	6,662	11.6%	7,279	11.4%	-8%
Operating Income(Loss)	2,052	3.6%	2,811	4.4%	-27%
Pretax Income(Loss)	2,411	4.2%	2,956	4.6%	-18%
Income Tax Benefit(Expense)	(651)	-1.1%	(552)	-0.9%	
Minority Interest	(17)	0.0%	(8)	0.0%	
Net Income(Loss)	1,743	3.0%	2,396	3.7%	-27%
EBITDA	3,646	6.3%	4,144	6.5%	-12%



# Consolidated Income Statement

## Sequential Comparison



(NT\$ Million except EPS)	Q4 / 2011	%	Q3 / 2011	%	Change
<b>Net Revenues:</b>					
IC Packaging	25,543	55.1%	26,331	56.4%	-3%
Testing	5,603	12.1%	5,498	11.8%	2%
Direct Material	668	1.4%	645	1.4%	4%
EMS	14,527	31.3%	14,210	30.4%	2%
Others	49	0.1%	14	-0.1%	250%
<b>Total Net Revenues</b>	<b>46,390</b>	<b>100.0%</b>	<b>46,698</b>	<b>100.0%</b>	<b>-1%</b>
<b>Gross Profit</b>	<b>8,475</b>	<b>18.3%</b>	<b>8,912</b>	<b>19.1%</b>	<b>-5%</b>
<b>Operating Income(Loss)</b>	<b>3,501</b>	<b>7.5%</b>	<b>4,312</b>	<b>9.2%</b>	<b>-19%</b>
<b>Pretax Income(Loss)</b>	<b>2,952</b>	<b>6.4%</b>	<b>4,200</b>	<b>9.0%</b>	<b>-30%</b>
<b>Income Tax Benefit(Expense)</b>	<b>(340)</b>	<b>-0.7%</b>	<b>(717)</b>	<b>-1.5%</b>	
<b>Minority Interest</b>	<b>27</b>	<b>0.1%</b>	<b>(15)</b>	<b>0.0%</b>	
<b>Net Income(Loss)</b>	<b>2,639</b>	<b>5.7%</b>	<b>3,468</b>	<b>7.4%</b>	<b>-24%</b>
<b>EPS<sup>1</sup></b>	<b>0.40</b>		<b>0.52</b>		
<b>EBITDA</b>	<b>9,782</b>	<b>21.1%</b>	<b>10,382</b>	<b>22.2%</b>	<b>-6%</b>

<sup>1</sup> All EPS figures are based on fully diluted number of shares



# Consolidated Income Statement

YoY Comparison



(NT\$ Million except EPS)	Q4 / 2011	%	Q4 / 2010	%	Change
<b>Net Revenues:</b>					
IC Packaging	25,543	55.1%	26,003	48.8%	-2%
Testing	5,603	12.1%	5,989	11.2%	-6%
Direct Material	668	1.4%	583	1.1%	15%
EMS	14,527	31.3%	17,226	32.3%	-16%
Others	49	0.1%	3,482	6.4%	-99%
<b>Total Net Revenues</b>	<b>46,390</b>	<b>100.0%</b>	<b>53,283</b>	<b>100.0%</b>	<b>-13%</b>
<b>Gross Profit</b>	<b>8,475</b>	<b>18.3%</b>	<b>11,967</b>	<b>22.5%</b>	<b>-29%</b>
<b>Operating Income(Loss)</b>	<b>3,501</b>	<b>7.5%</b>	<b>7,392</b>	<b>13.9%</b>	<b>-53%</b>
<b>Pretax Income(Loss)</b>	<b>2,952</b>	<b>6.4%</b>	<b>6,892</b>	<b>12.9%</b>	<b>-57%</b>
<b>Income Tax Benefit(Expense)</b>	<b>(340)</b>	<b>-0.7%</b>	<b>(1,791)</b>	<b>-3.4%</b>	
<b>Minority Interest</b>	<b>27</b>	<b>0.1%</b>	<b>(231)</b>	<b>-0.4%</b>	
<b>Net Income(Loss)</b>	<b>2,639</b>	<b>5.7%</b>	<b>4,870</b>	<b>9.1%</b>	<b>-46%</b>
<b>EPS<sup>1</sup></b>	<b>0.40</b>		<b>0.72</b>		
<b>EBITDA</b>	<b>9,782</b>	<b>21.1%</b>	<b>12,938</b>	<b>24.3%</b>	<b>-24%</b>

<sup>1</sup> All EPS figures are based on fully diluted number of shares





# Consolidated Income Statement

Full Year Comparison



(NT\$ Million except EPS)	FY / 2011	%	FY / 2010	%	Change
<b>Net Revenues:</b>					
IC Packaging	102,677	55.4%	101,071	53.5%	2%
Testing	21,932	11.8%	21,957	11.6%	0%
Direct Material	2,678	1.4%	2,656	1.4%	1%
EMS	57,850	31.2%	59,577	31.6%	-3%
Others	210	0.1%	3,482	1.7%	-94%
<b>Total Net Revenues</b>	<b>185,347</b>	<b>100.0%</b>	<b>188,743</b>	<b>100.0%</b>	<b>-2%</b>
<b>Gross Profit</b>	<b>35,009</b>	<b>18.9%</b>	<b>40,545</b>	<b>21.5%</b>	<b>-14%</b>
<b>Operating Income(Loss)</b>	<b>16,821</b>	<b>9.1%</b>	<b>24,099</b>	<b>12.8%</b>	<b>-30%</b>
<b>Pretax Income(Loss)</b>	<b>16,997</b>	<b>9.2%</b>	<b>22,824</b>	<b>12.1%</b>	<b>-26%</b>
<b>Income Tax Benefit(Expense)</b>	<b>(3,018)</b>	<b>-1.6%</b>	<b>(3,629)</b>	<b>-1.9%</b>	
<b>Minority Interest</b>	<b>(253)</b>	<b>-0.1%</b>	<b>(857)</b>	<b>-0.5%</b>	
<b>Net Income(Loss)</b>	<b>13,726</b>	<b>7.4%</b>	<b>18,338</b>	<b>9.7%</b>	<b>-25%</b>
<b>EPS<sup>1</sup></b>	<b>2.03</b>		<b>2.73</b>		
<b>EBITDA</b>	<b>41,925</b>	<b>22.6%</b>	<b>44,235</b>	<b>23.4%</b>	<b>-5%</b>

<sup>1</sup> All EPS figures are based on fully diluted number of shares



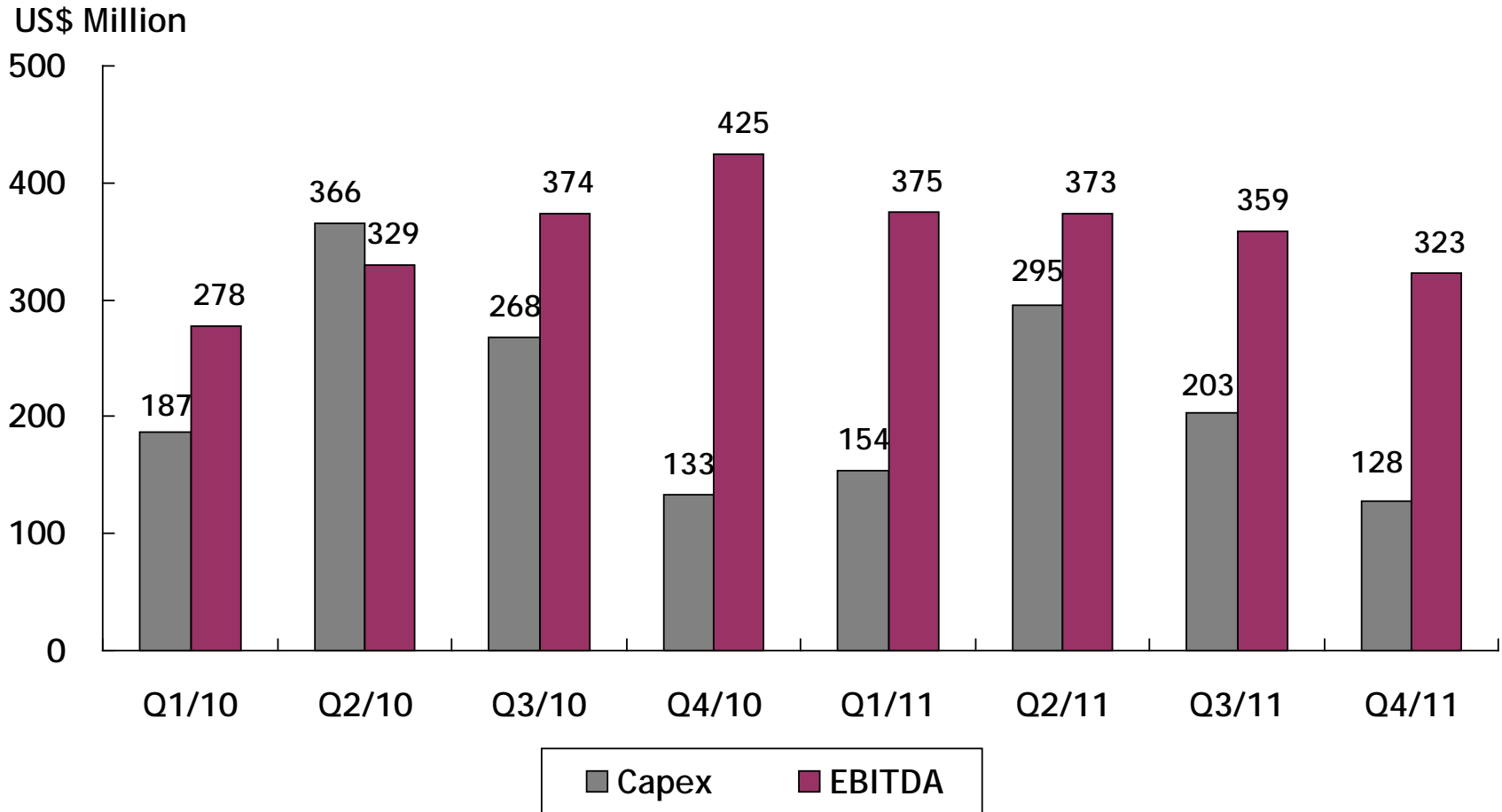
# Selective Balance Sheet Information



(NT\$ Million)	Dec. 31, 2011	Sep. 30, 2011	Change
Cash and Cash Equivalent	24,422	32,089	-23.9%
Financial Assets - current	846	1,091	-22.5%
Financial Assets - non current	2,221	2,640	-15.9%
<b>Total Assets</b>	<b>223,878</b>	<b>233,701</b>	<b>-4.2%</b>
ST Bank Debt - Revolving Credit	22,965	31,334	-26.7%
- Current Portion of LT Debt	3,461	3,542	-2.3%
LT Bank Debt	50,167	51,028	-1.7%
<b>Total Net Worth</b> (Including minority interest)	<b>102,283</b>	<b>102,108</b>	<b>0.2%</b>
Quarterly EBITDA	9,782	10,382	-5.8%
Current Ratio	1.35	1.32	
Net Debt to Equity	0.50	0.52	



# Capital Expenditure v.s. EBITDA



# Top 10 Customers

Q4 / 2011



## IC ATM

ATMEL  
AVAGO  
BROADCOM  
CAMBRIDGE  
MARVELL  
MEDIATEK  
MSTAR  
QUALCOMM  
RENESAS  
STM

## USI

AEE  
AUO  
CMO  
HONEYWELL  
IBM  
IEE  
LENOVO  
MOTOROLA  
SUPERMICRO  
VALEO

Top 5

Top 10

37% of Total Sales

51% of Total Sales

Top 5

Top 10

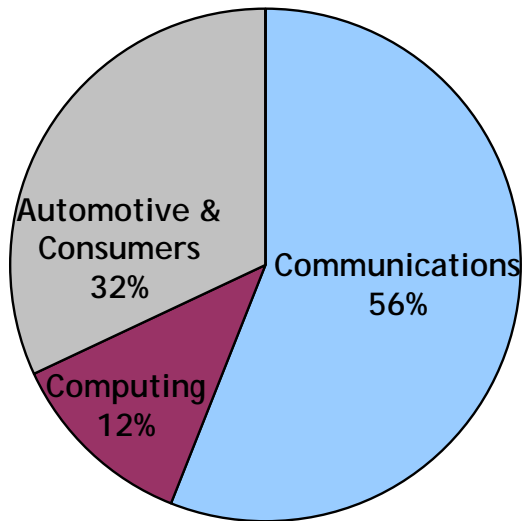
57% of Total Sales

80% of Total Sales

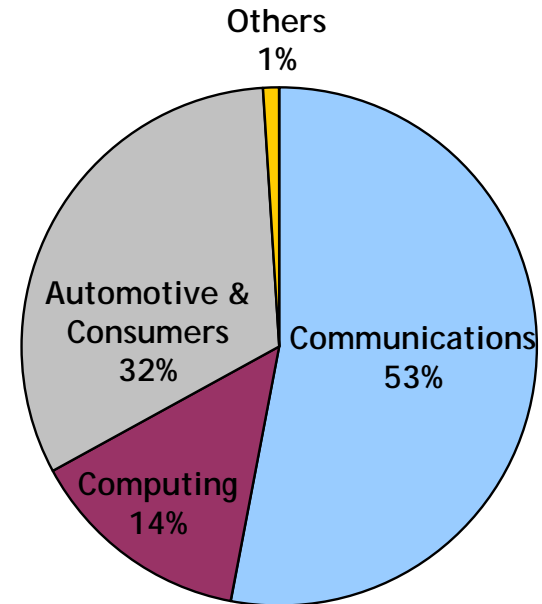


# IC ATM Market Segment Exposure

Q4 / 2011

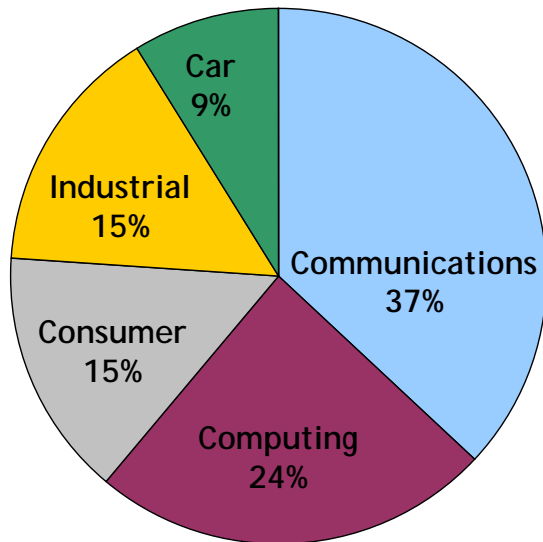


Q3 / 2011

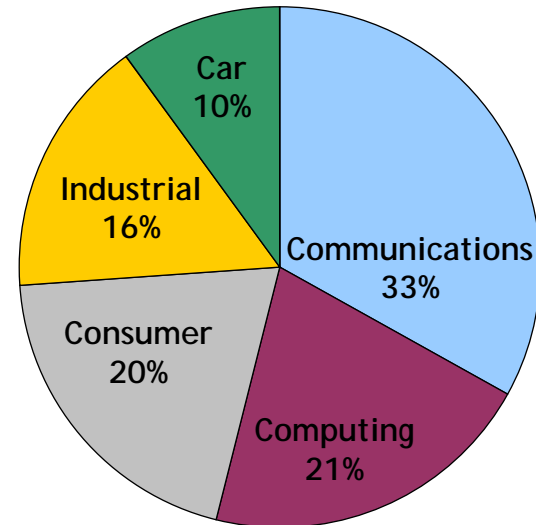


# USI Revenue Breakdown

Q4 / 2011



Q3 / 2011



For more information regarding ASE Group

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