



ASE GROUP



# 日月光半導體 2015第三季法人說明會

董宏思  
財務長  
日月光半導體  
2015年10月29日

# 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 press release. 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 press release. 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 or electronic industry; changes in our regulatory environment, including our ability to comply with new or stricter environmental regulations and to resolve environmental liabilities; demand for the outsourced semiconductor packaging, testing and electronic manufacturing services we offer and for such outsourced services generally; the highly competitive semiconductor or manufacturing industry we are involved in; our ability to introduce new technologies in order to remain competitive; international business activities; our business strategy; our future expansion plans and capital expenditures; the strained relationship between the Republic of China and the People's Republic of China; general economic and political conditions; the recent global economic crisis; possible disruptions in commercial activities caused by natural or human-induced disasters; 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 2014 Annual Report on Form 20-F filed on March 18, 2015.**



# 日月光公開收購矽品股份重大事項

- **2015年8月21號: 日月光公告擬收購矽品股份**
  - 日月光公告公開收購矽品公司台灣普通股與美國存託憑證。預定收購最高數量為七億七千九百萬股(包含普通股與其所表彰之存託憑證)，相當於矽品公司已發行普通股股份約24.99%
  - 公開收購時間起始於八月二十四號，以每股新台幣45元作為對價(每單位美國存託憑證表彰矽品公司普通股5股，每單位美國存託憑證之收購對價為相當於新台幣225元之美元現金) 公開收購矽品公司流通在外之普通股及美國存託憑證
- **2015年9月18號: 公開收購之條件成就**
  - 累計參與台灣收購應賣之普通股股數超過預定最低收購數量(相當於矽品公司已發行股份總數約5%)，台灣與美國之公開收購條件均成就
- **2015年9月22號: 公開收購截止**
  - 累計參與台灣及美國公開收購應賣之矽品公司普通股股數佔矽品公司全部已發行股份總數之36.83%，超過預定最高收購上限之24.99%
- **2015年10月1號: 日月光成為矽品公司24.99%的股東**
  - 日月光投資矽品之股份於第三季財務報表認列為權益法投資
  - 日月光將會於今年第四季認列部分矽品獲利為業外收益
  - 日月光將可以獲得矽品公司未來配發之股利



# 合併綜合損益表

與上一季比較

(未經會計師查核)



(新台幣百萬元)

營業收入淨額:

	Q3 / 2015	%	Q2 / 2015	%	季變化
封裝	29,575	40.6%	28,618	40.8%	3%
測試	6,426	8.8%	6,231	8.9%	3%
材料直接銷售	762	1.0%	839	1.2%	-9%
電子代工服務	36,107	49.5%	34,534	49.2%	5%
其它	0	0.0%	0	0.0%	
營業收入淨額合計	72,870	100.0%	70,222	100.0%	4%
營業毛利	12,987	17.8%	11,566	16.5%	12%
營業淨利 (淨損)	6,382	8.8%	5,409	7.7%	18%
稅前淨利 (淨損)	7,810	10.7%	5,400	7.7%	45%
所得稅利益 (費用)	(1,127)	-1.5%	(1,596)	-2.3%	
非控制權益	(315)	-0.4%	(152)	-0.2%	
歸屬於本公司業主之淨利	6,368	8.7%	3,652	5.2%	74%
基本每股盈餘 (新台幣元)	0.83		0.48		
稀釋每股盈餘 (新台幣元)	0.69		0.43		
EBITDA	15,903	21.8%	13,369	19.0%	19%



# 合併綜合損益表

與去年同期比較

(未經會計師查核)



(新台幣百萬元)	Q3 / 2015	%	Q3 / 2014	%	年變化
營業收入淨額:					
封裝	29,575	40.6%	32,031	48.1%	-8%
測試	6,426	8.8%	6,827	10.2%	-6%
材料直接銷售	762	1.0%	1,033	1.6%	-26%
電子代工服務	36,107	49.5%	26,741	40.1%	35%
其它	0	0.0%	0	0.0%	
營業收入淨額合計	72,870	100.0%	66,632	100.0%	9%
營業毛利	12,987	17.8%	14,208	21.3%	-9%
營業淨利 (淨損)	6,382	8.8%	8,099	12.2%	-21%
稅前淨利 (淨損)	7,810	10.7%	8,605	12.9%	-9%
所得稅利益 (費用)	(1,127)	-1.5%	(1,240)	-1.9%	
非控制權益	(315)	-0.4%	(148)	-0.2%	
歸屬於本公司業主之淨利	6,368	8.7%	7,217	10.8%	-12%
基本每股盈餘 (新台幣元)	0.83		0.94		
稀釋每股盈餘 (新台幣元)	0.69		0.82		
EBITDA	15,903	21.8%	15,881	23.8%	0%



# 綜合損益表 – 半導體封裝測試

與上一季比較

(未經會計師查核)



(新台幣百萬元)	Q3 / 2015	%	Q2 / 2015	%	季變化
營業收入淨額:					
封裝	32,489	81.5%	30,558	81.1%	6%
測試	6,426	16.1%	6,230	16.5%	3%
材料直接銷售	928	2.3%	865	2.3%	7%
其它	19	0.0%	18	0.0%	6%
營業收入淨額合計	39,862	100.0%	37,671	100.0%	6%
營業毛利	10,651	26.7%	9,504	25.2%	12%
營業淨利 (淨損)	5,644	14.2%	5,101	13.5%	11%
稅前淨利 (淨損)	7,433	18.6%	5,229	13.9%	42%
所得稅利益 (費用)	(1,016)	-2.5%	(1,537)	-4.1%	
非控制權益	(49)	-0.1%	(40)	-0.1%	
歸屬於本公司業主之淨利	6,368	16.0%	3,652	9.7%	74%
EBITDA	14,898	37.4%	11,620	30.8%	28%



# 綜合損益表 – 半導體封裝測試

與去年同期比較

(未經會計師查核)

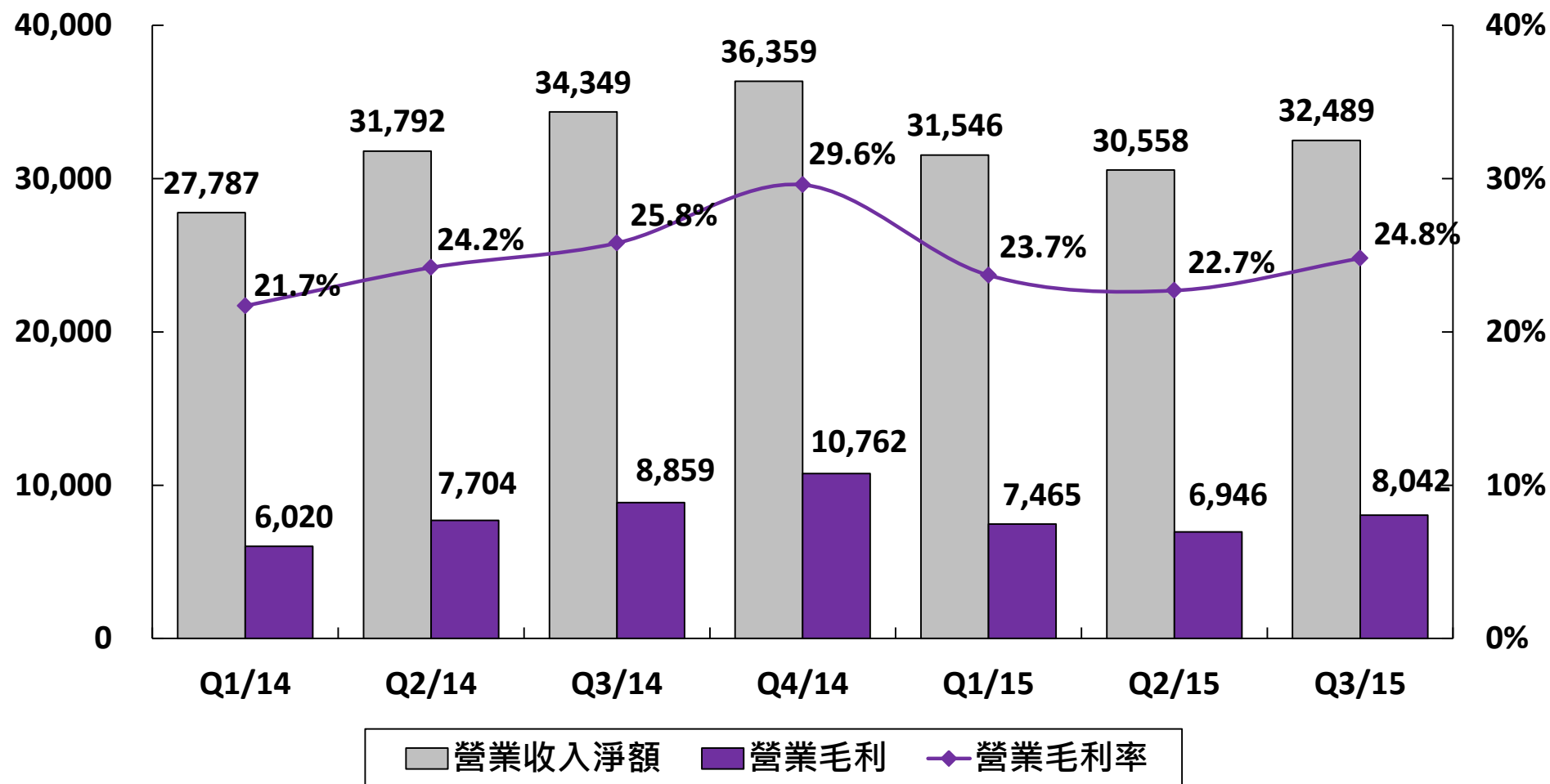


(新台幣百萬元)	Q3 / 2015	%	Q3 / 2014	%	年變化
營業收入淨額:					
封裝	32,489	81.5%	34,349	81.4%	-5%
測試	6,426	16.1%	6,827	16.2%	-6%
材料直接銷售	928	2.3%	1,035	2.5%	-10%
其它	19	0.0%	0	0.0%	
營業收入淨額合計	39,862	100.0%	42,211	100.0%	-6%
營業毛利	10,651	26.7%	12,082	28.6%	-12%
營業淨利 (淨損)	5,644	14.2%	7,361	17.4%	-23%
稅前淨利 (淨損)	7,433	18.6%	8,381	19.9%	-11%
所得稅利益 (費用)	(1,016)	-2.5%	(1,108)	-2.6%	
非控制權益	(49)	-0.1%	(56)	-0.1%	
歸屬於本公司業主之淨利	6,368	16.0%	7,217	17.1%	-12%
EBITDA	14,898	37.4%	14,761	35.0%	1%



# 封裝業務

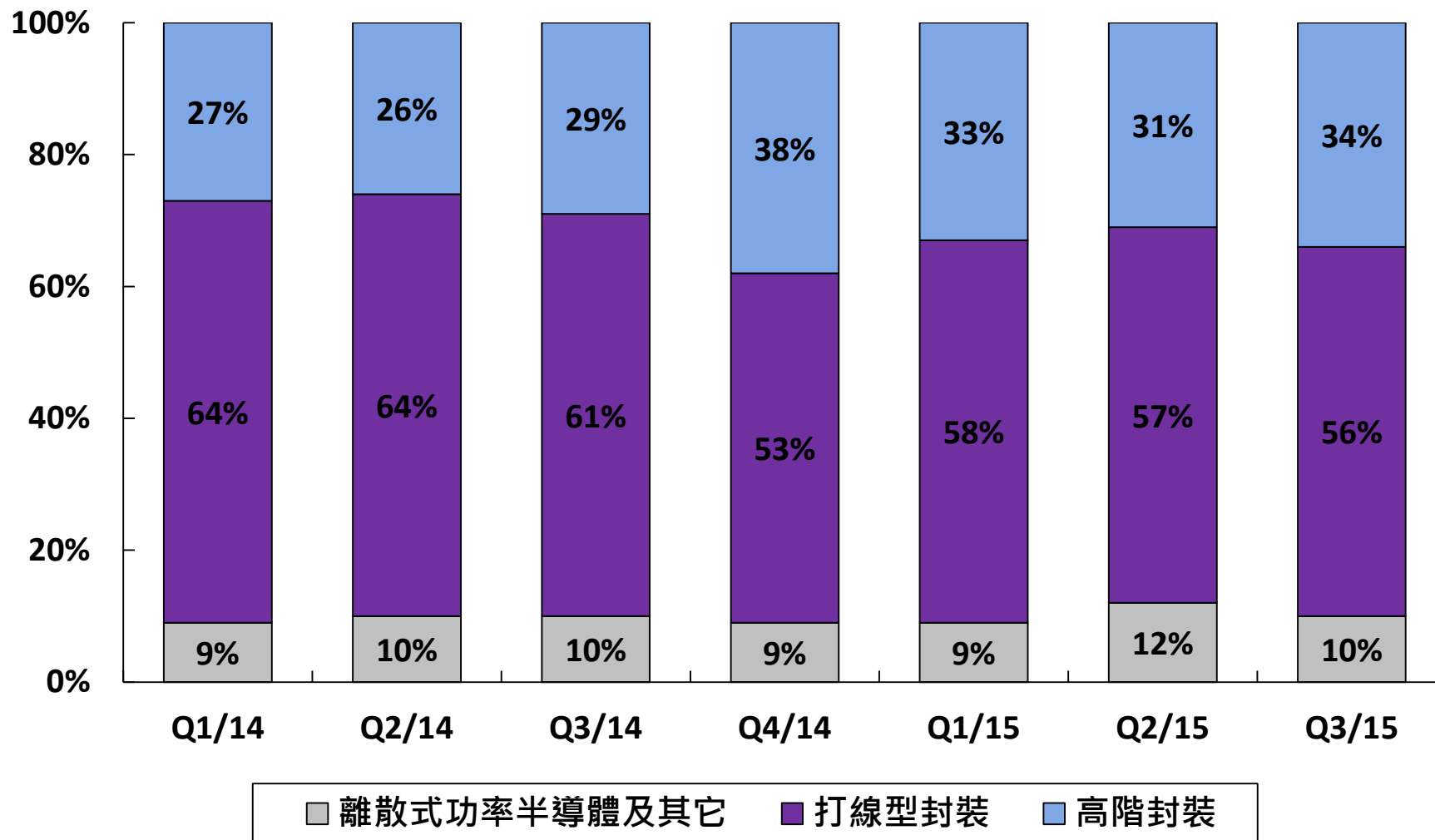
新台幣百萬元





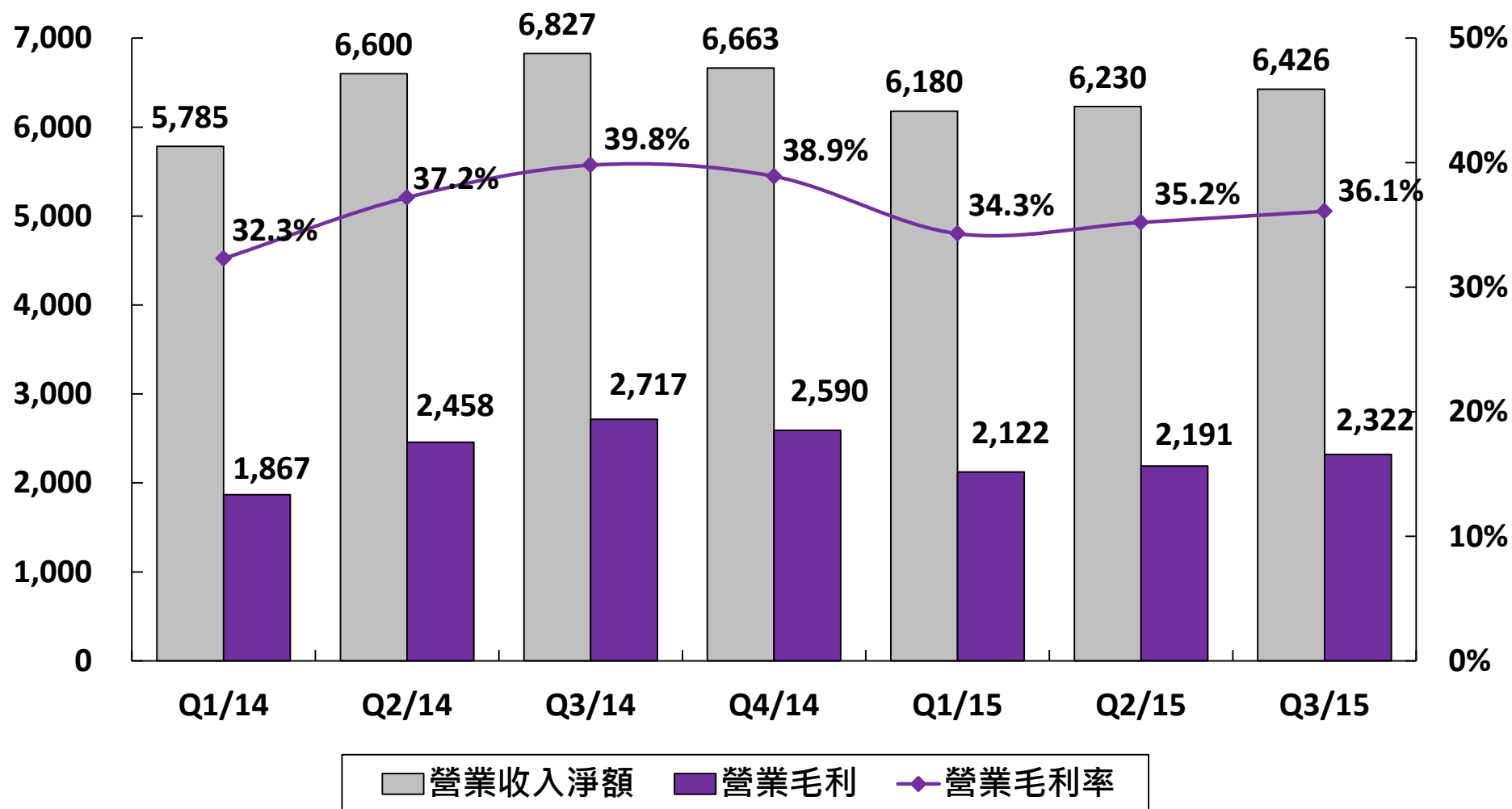
# 封裝業務

產品組合



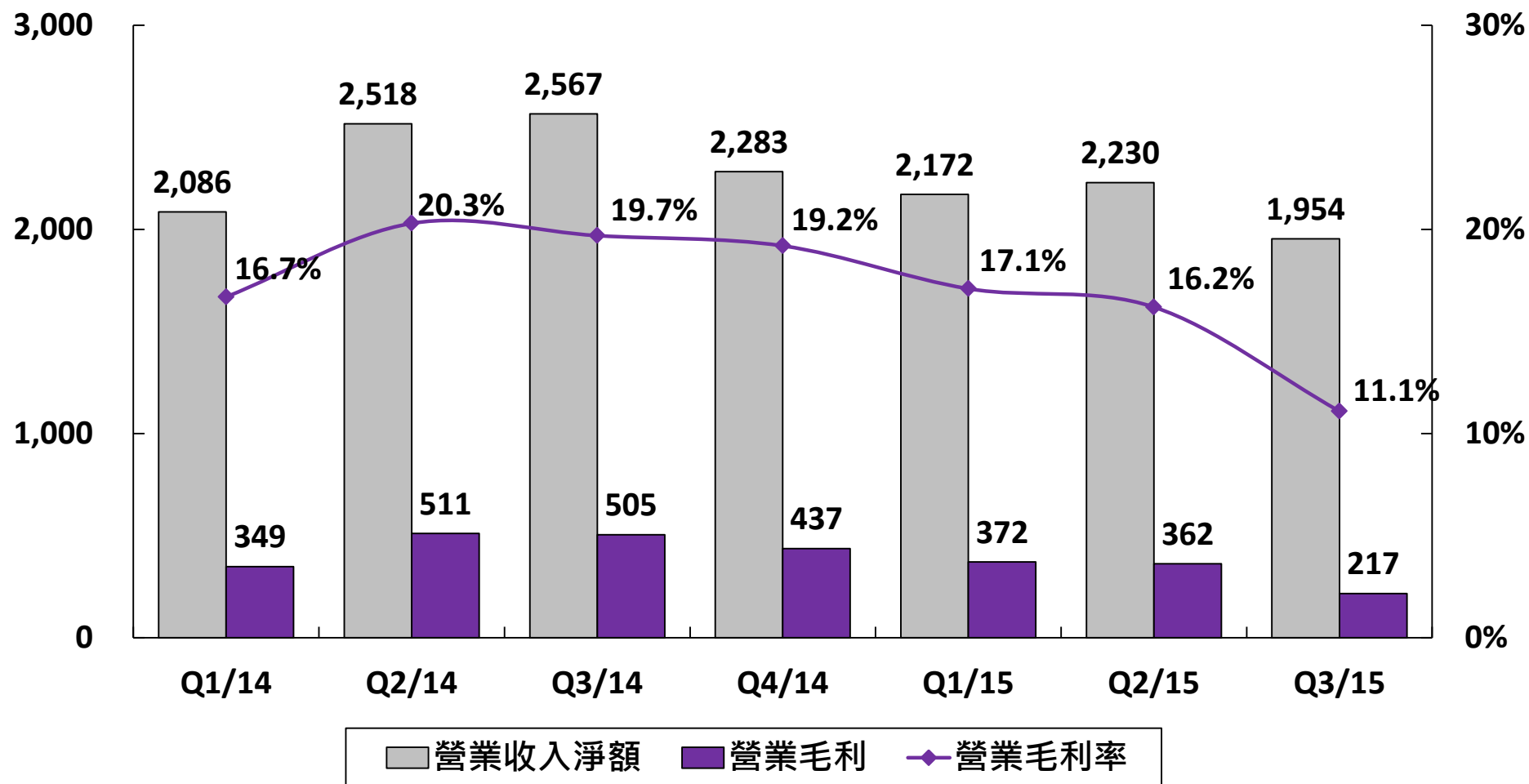
# 測試業務

新台幣百萬元



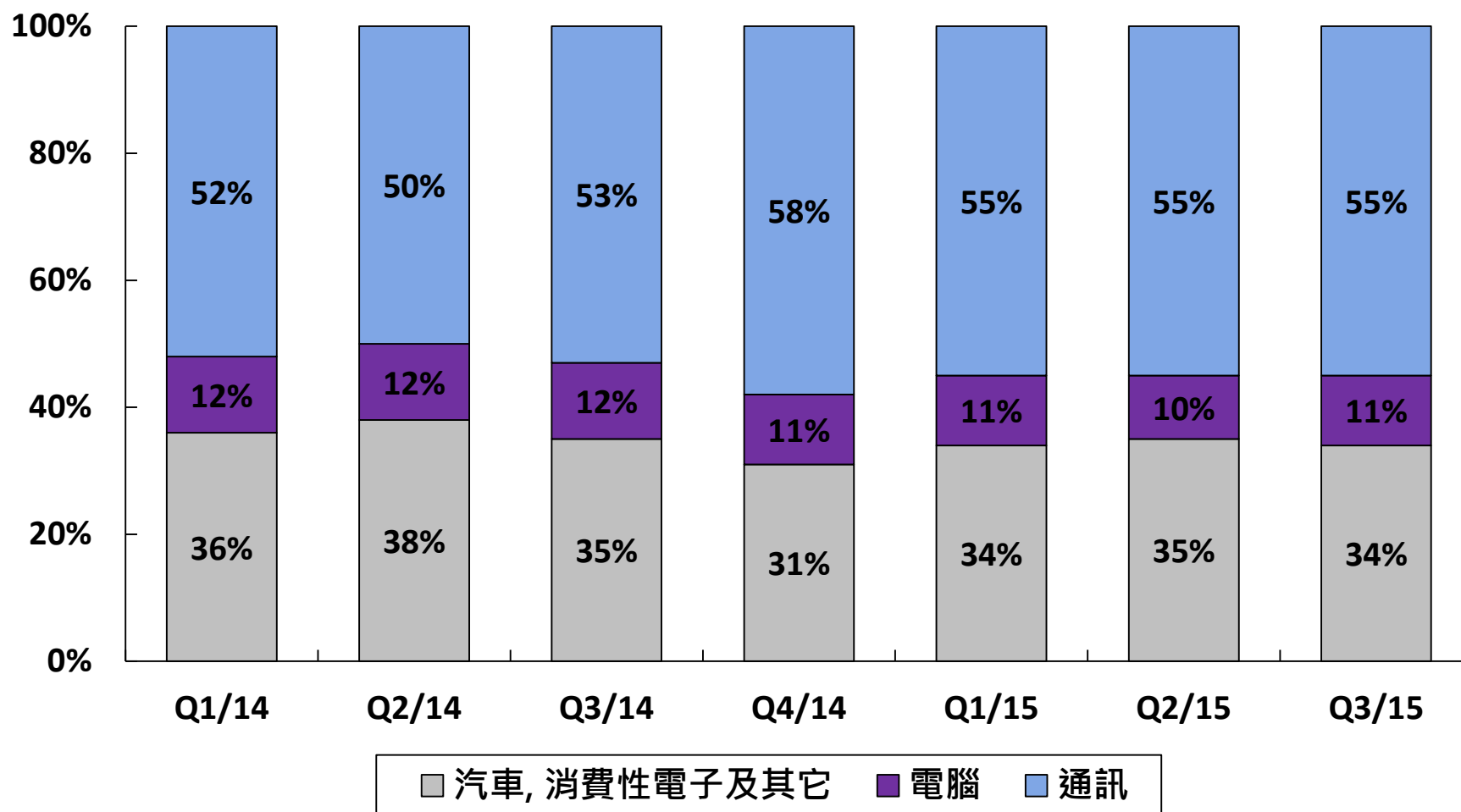
# 材料業務

新台幣百萬元



# 半導體封測營收

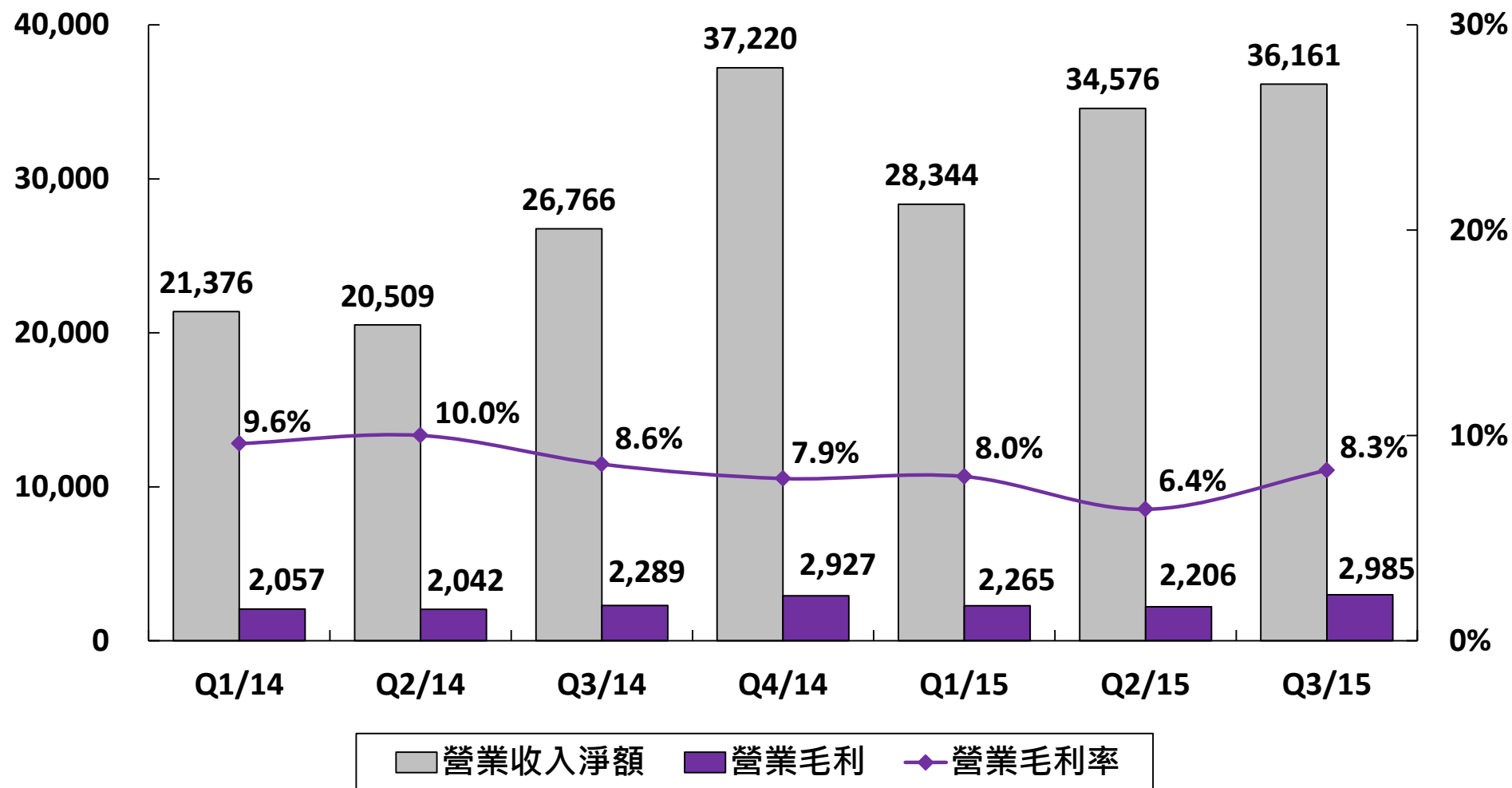
產品應用別佔比



# 電子代工服務業務

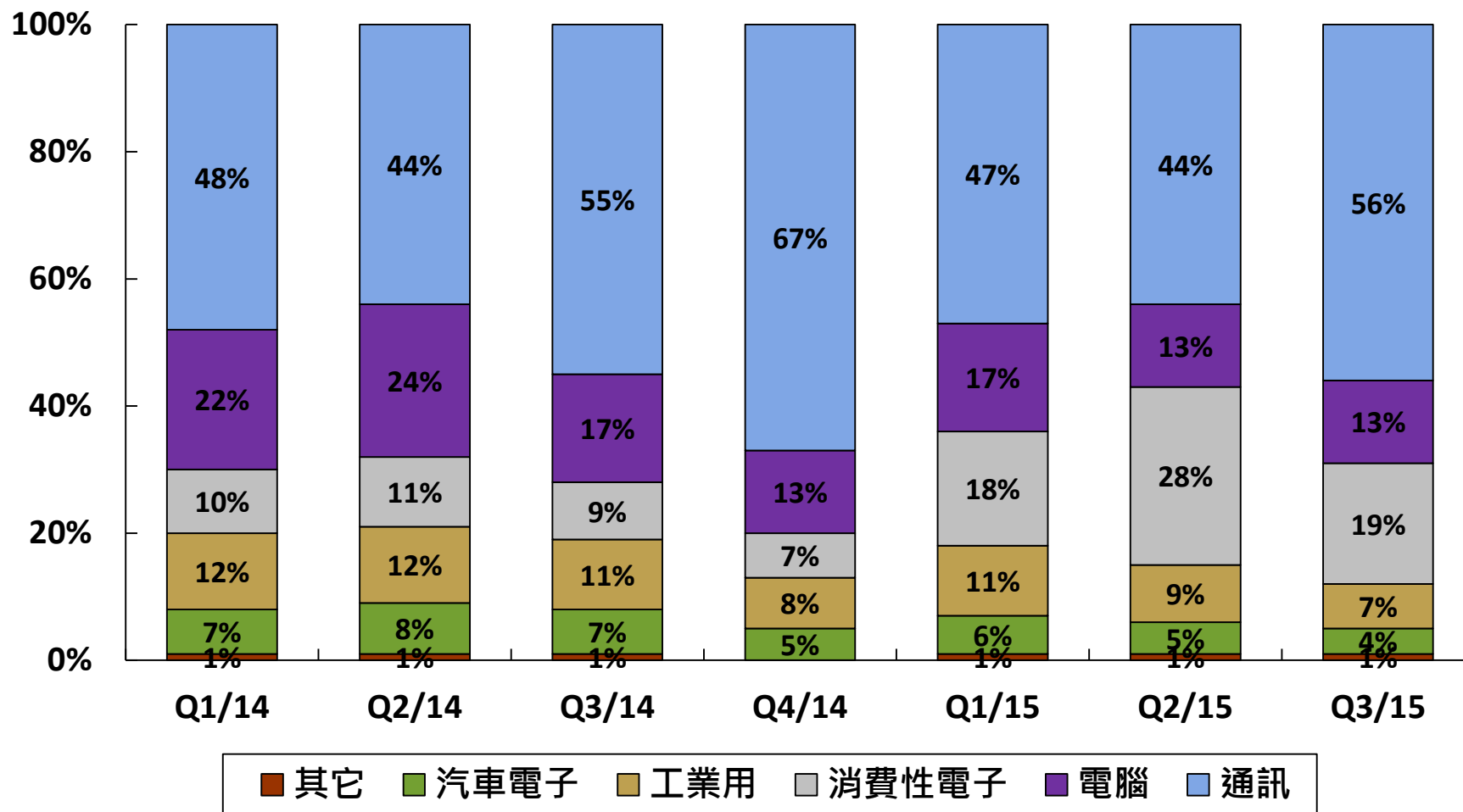


新台幣百萬元



# 電子代工服務業務

產品應用別



# 重要資產負債表項目及財務指標

(未經會計師查核)



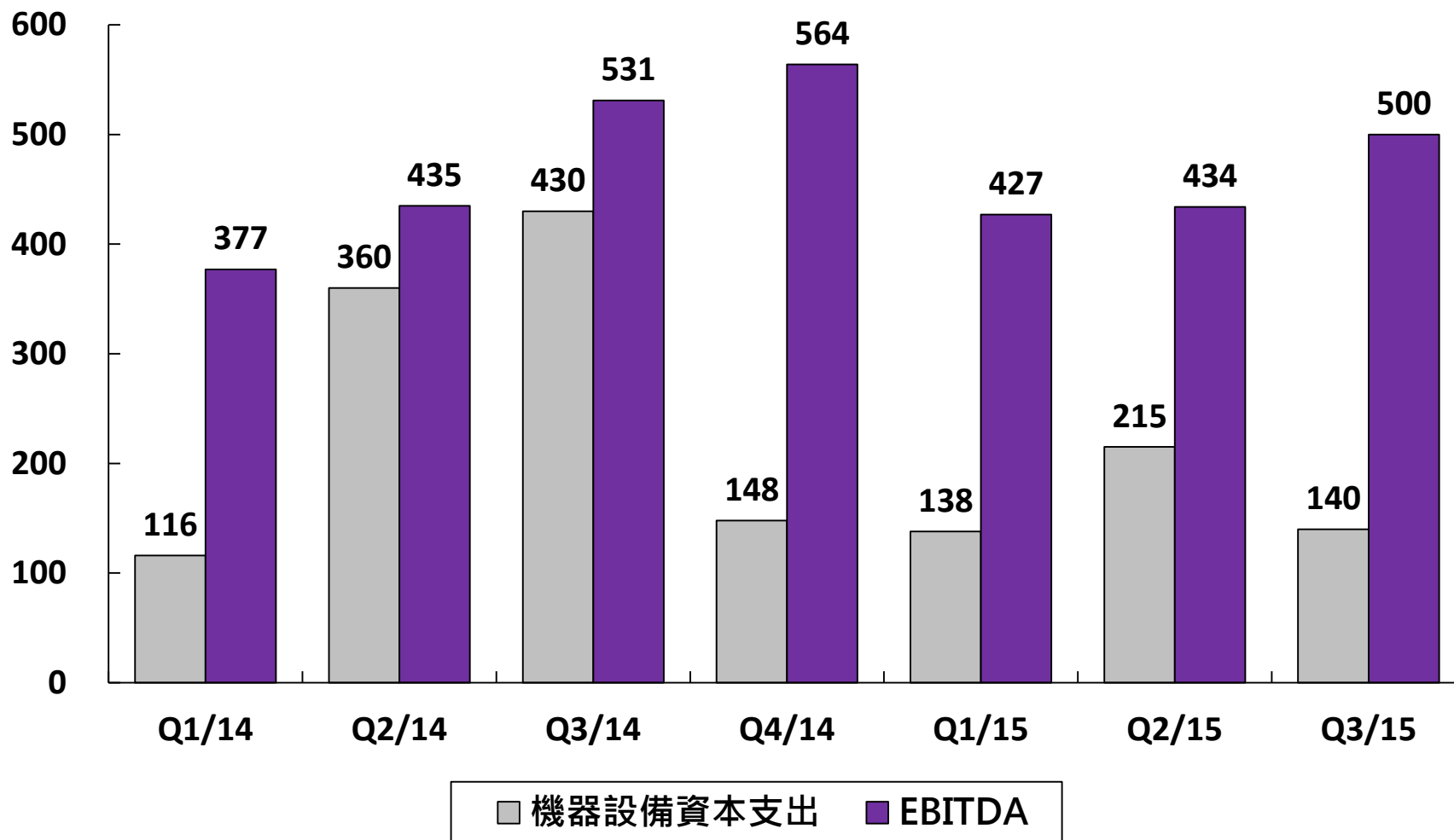
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(新台幣百萬元)	2015年9月30日	2015年6月30日	季變化
現金及約當現金	42,410	54,175	-21.7%
金融資產 - 流動	3,158	4,690	-32.7%
金融資產 - 非流動及採用權益法之投資	37,887	2,280	1561.7%
不動產、廠房及設備	152,981	152,755	0.1%
資產總計	368,452	335,161	9.9%
短期借款	45,747	37,193	23.0%
一年內到期之應付公司債	2,578	0	
一年內到期之長期借款及應付租賃款	2,028	1,554	30.5%
應付公司債	35,804	30,867	16.0%
長期借款及應付租賃款	38,389	22,290	72.2%
權益總計 (含非控制權益)	164,283	152,688	7.6%
當季 EBITDA	15,903	13,369	19.0%
流動比率	1.31	1.34	
負債權益比率	0.48	0.22	



# 機器設備資本支出及EBITDA

美金百萬元





# 2015年第四季業績展望

根據對當前業務狀況的評估及匯率的假設，日月光公司2015年第四季的業績展望如下：

- 半導體封測事業之產能持平而產能利用率下滑4%到6%;
- 半導體封測事業之毛利率應與1Q15水準相近;
- 電子代工服務之產能持平而產能利用率應上升14%到16%;
- 電子代工服務毛利率應接近2Q15水準。



# Thank You

[www.aseglobal.com](http://www.aseglobal.com)  
[ir@aseglobal.com](mailto:ir@aseglobal.com)

