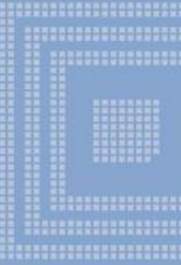




ASE GROUP



日月光半導體 2016第一季法人說明會

董宏思
財務長
日月光半導體
2016年4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.



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)	Q1 / 2016	%	Q4 / 2015	%	季變化
營業收入淨額:					
封裝	28,036	45.0%	29,093	38.5%	-4%
測試	5,995	9.6%	6,356	8.4%	-6%
材料直接銷售	892	1.4%	798	1.1%	12%
電子代工服務	24,749	39.7%	39,301	52.0%	-37%
其它	2,699	4.3%	0	0.0%	
營業收入淨額合計	62,371	100.0%	75,548	100.0%	-17%
營業毛利	11,449	18.4%	13,269	17.6%	-14%
營業淨利 (淨損)	5,206	8.3%	6,801	9.0%	-23%
稅前淨利 (淨損)	5,656	9.1%	6,572	8.7%	-14%
所得稅利益 (費用)	(1,318)	-2.1%	(1,260)	-1.7%	
非控制權益	(175)	-0.3%	(322)	-0.4%	
歸屬於本公司業主之淨利	4,163	6.7%	4,990	6.6%	-17%
基本每股盈餘 (新台幣元)	0.54		0.65		
稀釋每股盈餘 (新台幣元)	0.43		0.63		
EBITDA	13,229	21.2%	14,189	18.8%	-7%



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)	Q1 / 2016	%	Q1 / 2015	%	年變化
營業收入淨額:					
封裝	28,036	45.0%	29,321	45.3%	-4%
測試	5,995	9.6%	6,180	9.6%	-3%
材料直接銷售	892	1.4%	861	1.3%	4%
電子代工服務	24,749	39.7%	28,300	43.8%	-13%
其它	2,699	4.3%	0	0.0%	
營業收入淨額合計	62,371	100.0%	64,662	100.0%	-4%
營業毛利	11,449	18.4%	12,313	19.0%	-7%
營業淨利 (淨損)	5,206	8.3%	6,292	9.7%	-17%
稅前淨利 (淨損)	5,656	9.1%	5,506	8.5%	3%
所得稅利益 (費用)	(1,318)	-2.1%	(856)	-1.3%	
非控制權益	(175)	-0.3%	(181)	-0.3%	
歸屬於本公司業主之淨利	4,163	6.7%	4,469	6.9%	-7%
基本每股盈餘 (新台幣元)	0.54		0.58		
稀釋每股盈餘 (新台幣元)	0.43		0.56		
EBITDA	13,229	21.2%	13,470	20.8%	-2%



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)	Q1 / 2016	%	Q4 / 2015	%	季變化
營業收入淨額:					
封裝	28,597	80.5%	31,121	81.0%	-8%
測試	5,995	16.9%	6,356	16.5%	-6%
材料直接銷售	931	2.6%	910	2.4%	2%
其它	20	0.1%	19	0.0%	5%
營業收入淨額合計	35,543	100.0%	38,406	100.0%	-7%
營業毛利	7,832	22.0%	9,977	26.0%	-21%
營業淨利 (淨損)	3,222	9.1%	5,313	13.8%	-39%
稅前淨利 (淨損)	4,746	13.4%	6,140	16.0%	-23%
所得稅利益 (費用)	(529)	-1.5%	(1,099)	-2.9%	
非控制權益	(54)	-0.2%	(51)	-0.1%	
歸屬於本公司業主之淨利	4,163	11.7%	4,990	13.0%	-17%
EBITDA	10,580	29.8%	12,005	31.3%	-12%



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)

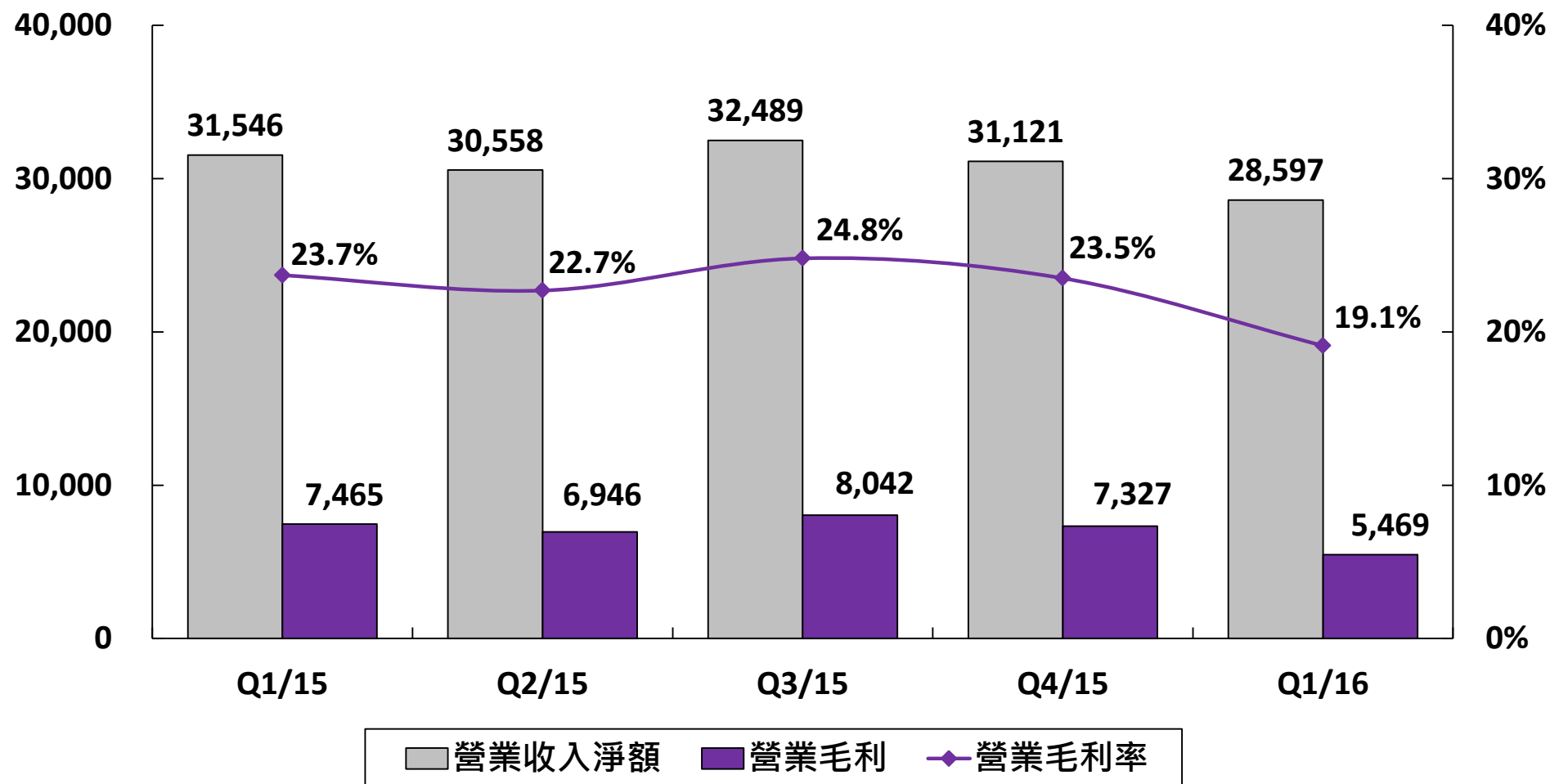


(新台幣百萬元)	Q1 / 2016	%	Q1 / 2015	%	年變化
營業收入淨額:					
封裝	28,597	80.5%	31,546	81.7%	-9%
測試	5,995	16.9%	6,180	16.0%	-3%
材料直接銷售	931	2.6%	861	2.2%	8%
其它	20	0.1%	18	0.0%	11%
營業收入淨額合計	35,543	100.0%	38,605	100.0%	-8%
營業毛利	7,832	22.0%	9,995	25.9%	-22%
營業淨利 (淨損)	3,222	9.1%	5,546	14.4%	-42%
稅前淨利 (淨損)	4,746	13.4%	5,230	13.5%	-9%
所得稅利益 (費用)	(529)	-1.5%	(709)	-1.8%	
非控制權益	(54)	-0.2%	(52)	-0.1%	
歸屬於本公司業主之淨利	4,163	11.7%	4,469	11.6%	-7%
EBITDA	10,580	29.8%	11,937	30.9%	-11%



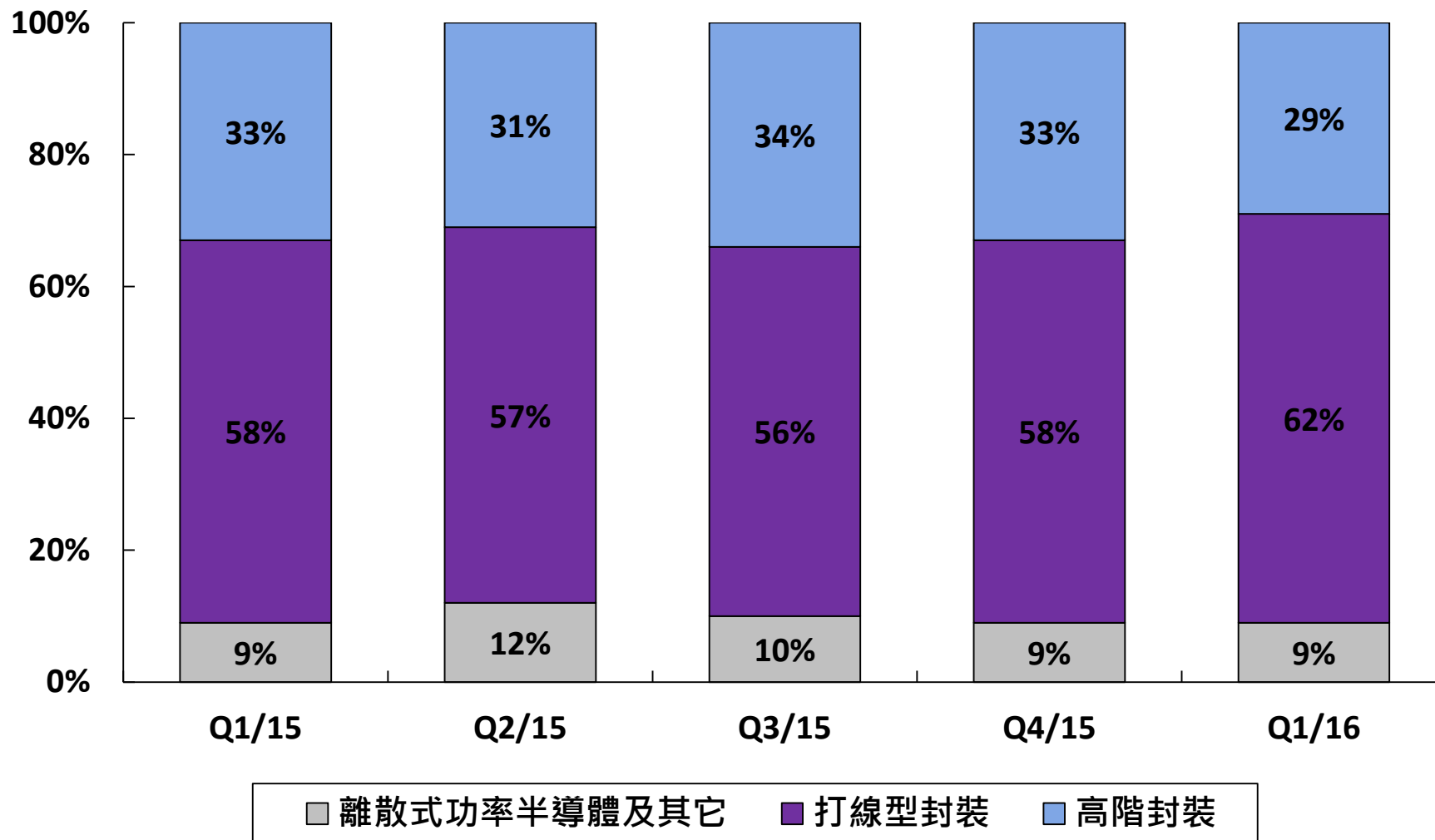
封裝業務

新台幣百萬元



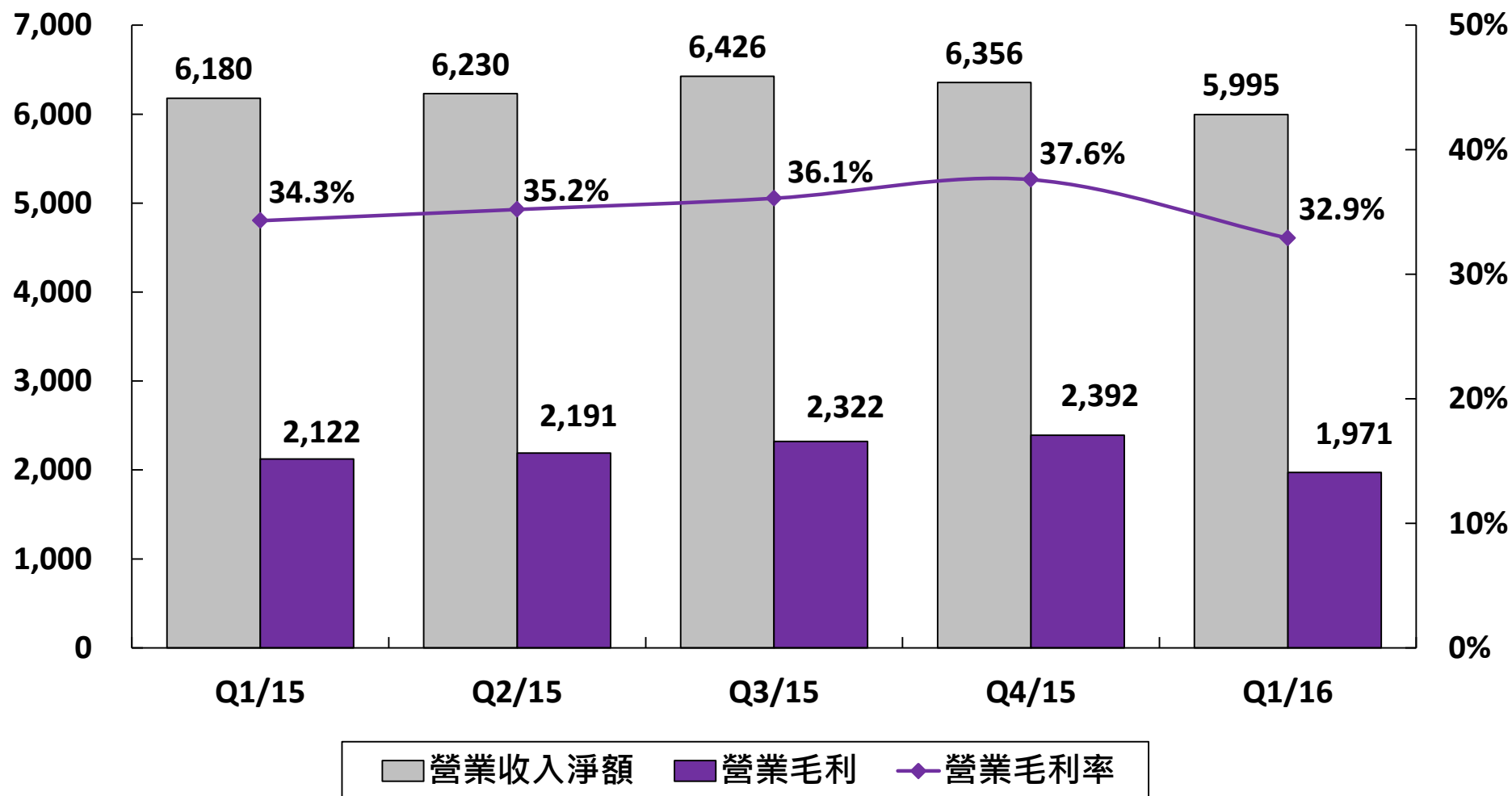
封裝業務

產品組合



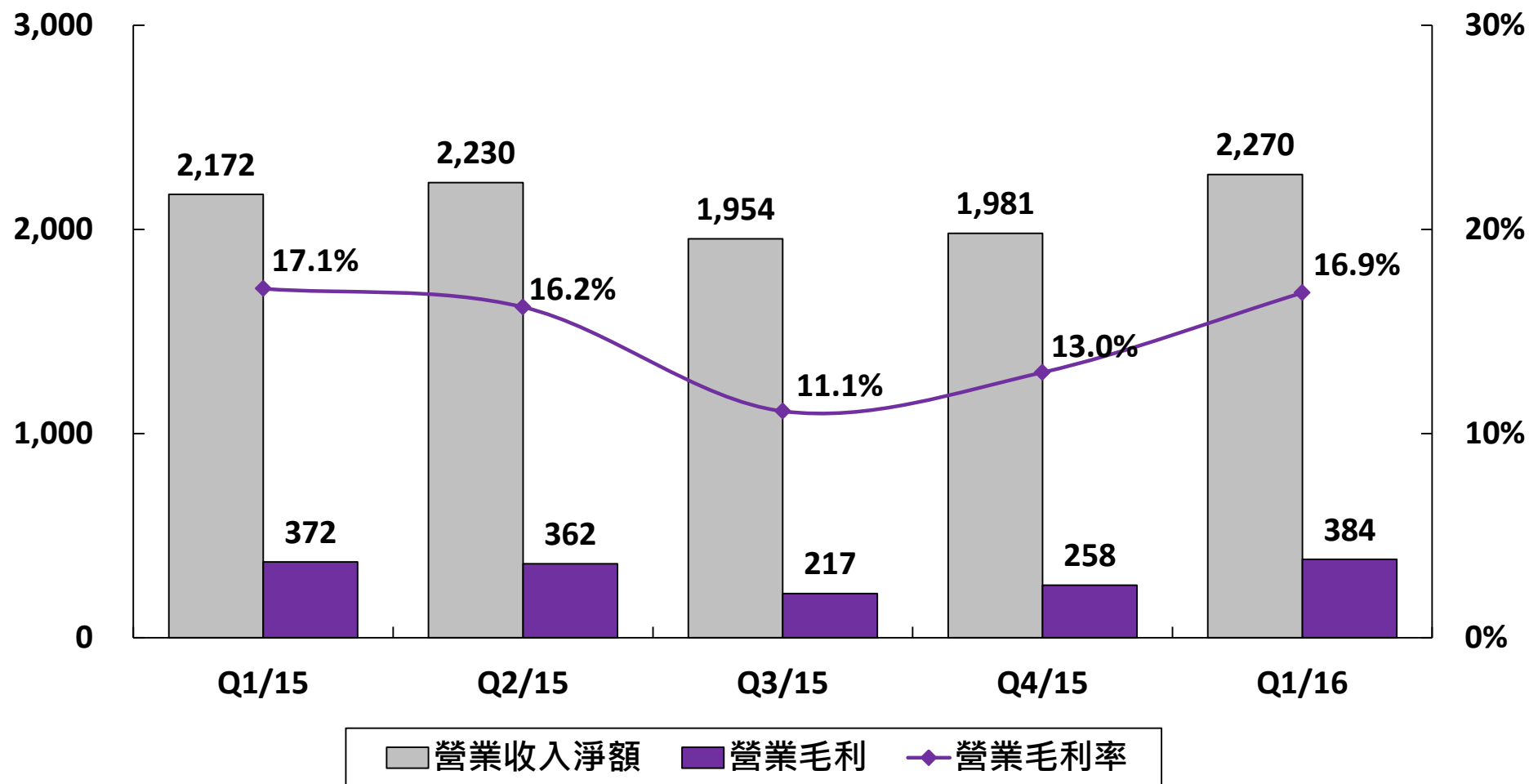
測試業務

新台幣百萬元



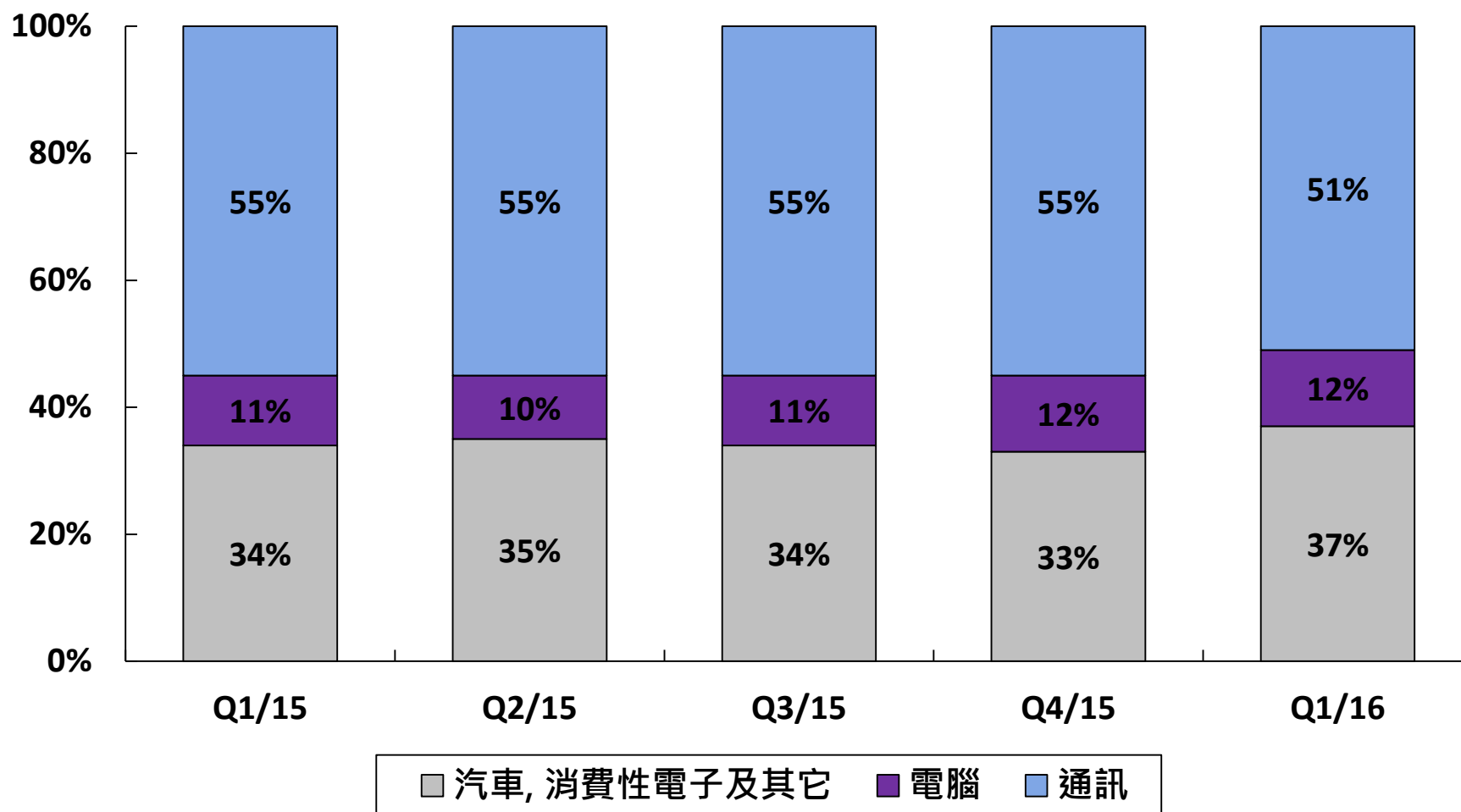
材料業務

新台幣百萬元



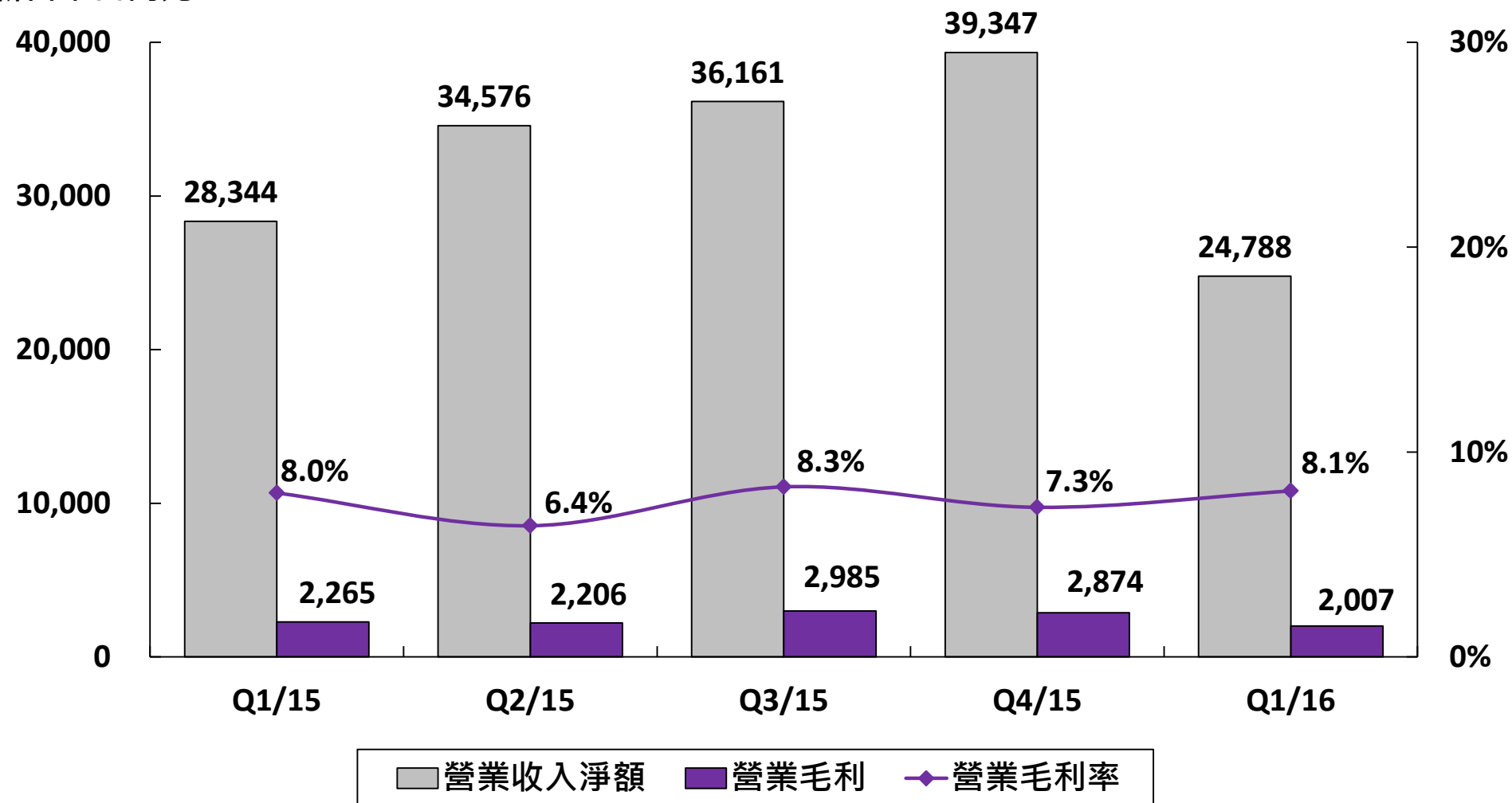
半導體封測營收

產品應用別佔比



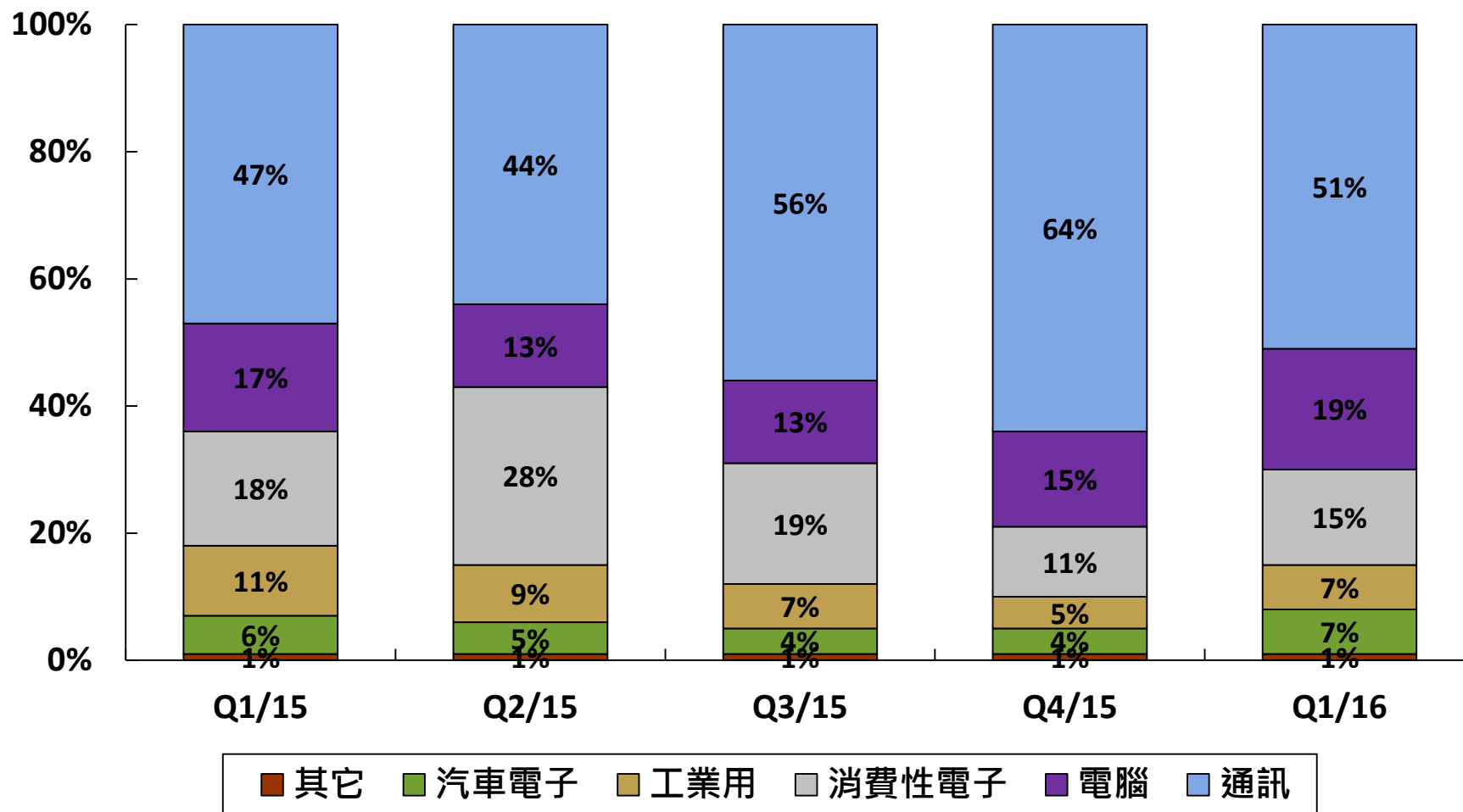
電子代工服務業務

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)



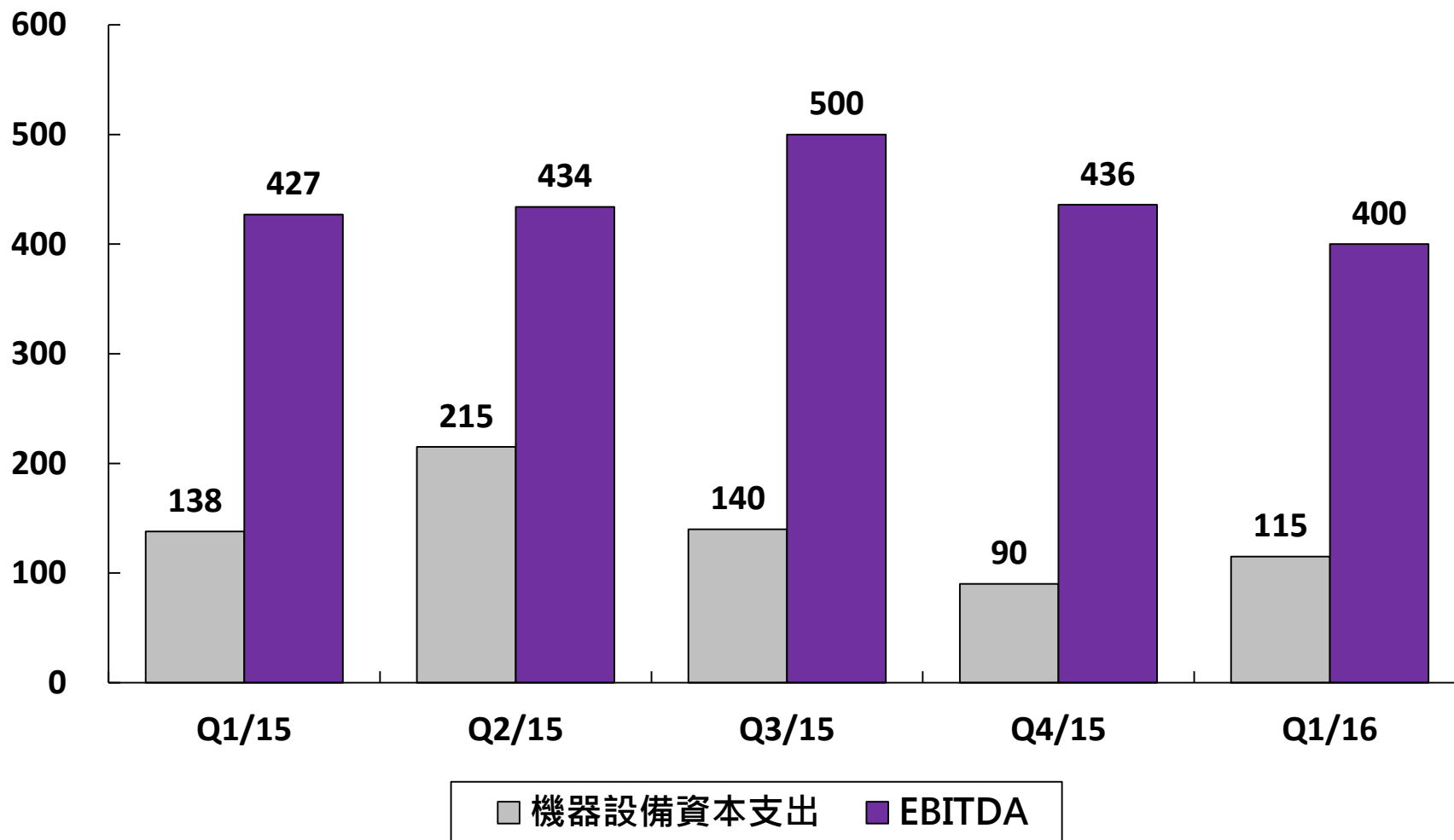
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(新台幣百萬元)	2016年3月31日	2015年12月31日	季變化
現金及約當現金	45,070	55,251	-18.4%
金融資產 - 流動	3,971	3,864	2.8%
金融資產 - 非流動及採用權益法之投資	51,985	38,347	35.6%
不動產、廠房及設備	147,234	149,997	-1.8%
資產總計	356,490	365,288	-2.4%
短期借款及應付短期票券	34,154	36,983	-7.6%
一年內到期之應付公司債	14,482	14,686	-1.4%
一年內到期之長期借款及應付租賃款	1,356	2,157	-37.1%
應付公司債	32,582	23,740	37.2%
長期借款及應付租賃款	36,089	42,795	-15.7%
權益總計 (含非控制權益)	168,737	168,420	0.2%
當季 EBITDA	13,229	14,189	-6.8%
流動比率	1.25	1.30	
負債權益比率	0.41	0.36	



機器設備資本支出及EBITDA

美金百萬元



2016年第二季業績展望



根據對當前業務狀況的評估及匯率的假設，日月光公司2016年第二季的業績展望如下：

- 整體半導體封測事業將接近去年第四季水準，但其中系統級封裝事業將持續季節性疲弱；
- 半導體封測事業毛利率將較前季增長，但應略低於去年第四季水準；
- 電子代工服務生意量將會略低於前季水準；
- 電子代工服務毛利率應與前季水準相仿。



Thank You

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