



ASE GROUP



日月光半導體 2016第三季法人說明會

2016年10月27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 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 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 uncertainties as to whether we can complete the acquisition of 100% of Siliconware Precision Industries Co., Ltd. shares not otherwise owned by ASE; 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 2015 Annual Report on Form 20-F filed on April 29, 2016.



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)	Q3 / 2016	%	Q2 / 2016	%	季變化
營業收入淨額:					
封裝	33,449	46.0%	30,178	48.2%	11%
測試	7,231	9.9%	6,503	10.4%	11%
材料直接銷售	805	1.1%	759	1.2%	6%
電子代工服務	31,174	42.8%	24,845	39.7%	25%
其它	125	0.2%	316	0.5%	-60%
營業收入淨額合計	72,784	100.0%	62,601	100.0%	16%
營業毛利	14,113	19.4%	12,255	19.6%	15%
營業淨利 (淨損)	7,438	10.2%	5,931	9.5%	25%
稅前淨利 (淨損)	6,875	9.4%	6,122	9.8%	12%
所得稅利益 (費用)	(976)	-1.3%	(1,523)	-2.4%	
非控制權益	(393)	-0.5%	(271)	-0.4%	
歸屬於本公司業主之淨利	5,506	7.6%	4,328	6.9%	27%
基本每股盈餘 (新台幣元)	0.72		0.57		26%
稀釋每股盈餘 (新台幣元)	0.64		0.47		36%
EBITDA	14,701	20.2%	13,977	22.3%	5%



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 / 2016	%	Q3 / 2015	%	年變化
營業收入淨額:					
封裝	33,449	46.0%	29,575	40.6%	13%
測試	7,231	9.9%	6,426	8.8%	13%
材料直接銷售	805	1.1%	762	1.0%	6%
電子代工服務	31,174	42.8%	36,107	49.5%	-14%
其它	125	0.2%	0	0.0%	
營業收入淨額合計	72,784	100.0%	72,870	100.0%	0%
營業毛利	14,113	19.4%	12,987	17.8%	9%
營業淨利 (淨損)	7,438	10.2%	6,382	8.8%	17%
稅前淨利 (淨損)	6,875	9.4%	7,810	10.7%	-12%
所得稅利益 (費用)	(976)	-1.3%	(1,127)	-1.5%	
非控制權益	(393)	-0.5%	(315)	-0.4%	
歸屬於本公司業主之淨利	5,506	7.6%	6,368	8.7%	-14%
基本每股盈餘 (新台幣元)	0.72		0.83		-13%
稀釋每股盈餘 (新台幣元)	0.64		0.69		-7%
EBITDA	14,701	20.2%	15,903	21.8%	-8%



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 / 2016	%	Q2 / 2016	%	季變化
營業收入淨額:					
封裝	34,832	81.0%	31,180	81.0%	12%
測試	7,232	16.8%	6,502	16.9%	11%
材料直接銷售	920	2.1%	801	2.1%	15%
其它	22	0.1%	21	0.1%	5%
營業收入淨額合計	43,006	100.0%	38,504	100.0%	12%
營業毛利	10,969	25.5%	9,561	24.8%	15%
營業淨利 (淨損)	6,193	14.4%	4,957	12.9%	25%
稅前淨利 (淨損)	6,319	14.7%	5,650	14.7%	12%
所得稅利益 (費用)	(719)	-1.7%	(1,266)	-3.3%	
非控制權益	(94)	-0.2%	(56)	-0.1%	
歸屬於本公司業主之淨利	5,506	12.8%	4,328	11.2%	27%
EBITDA	12,635	29.4%	12,206	31.7%	4%



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)

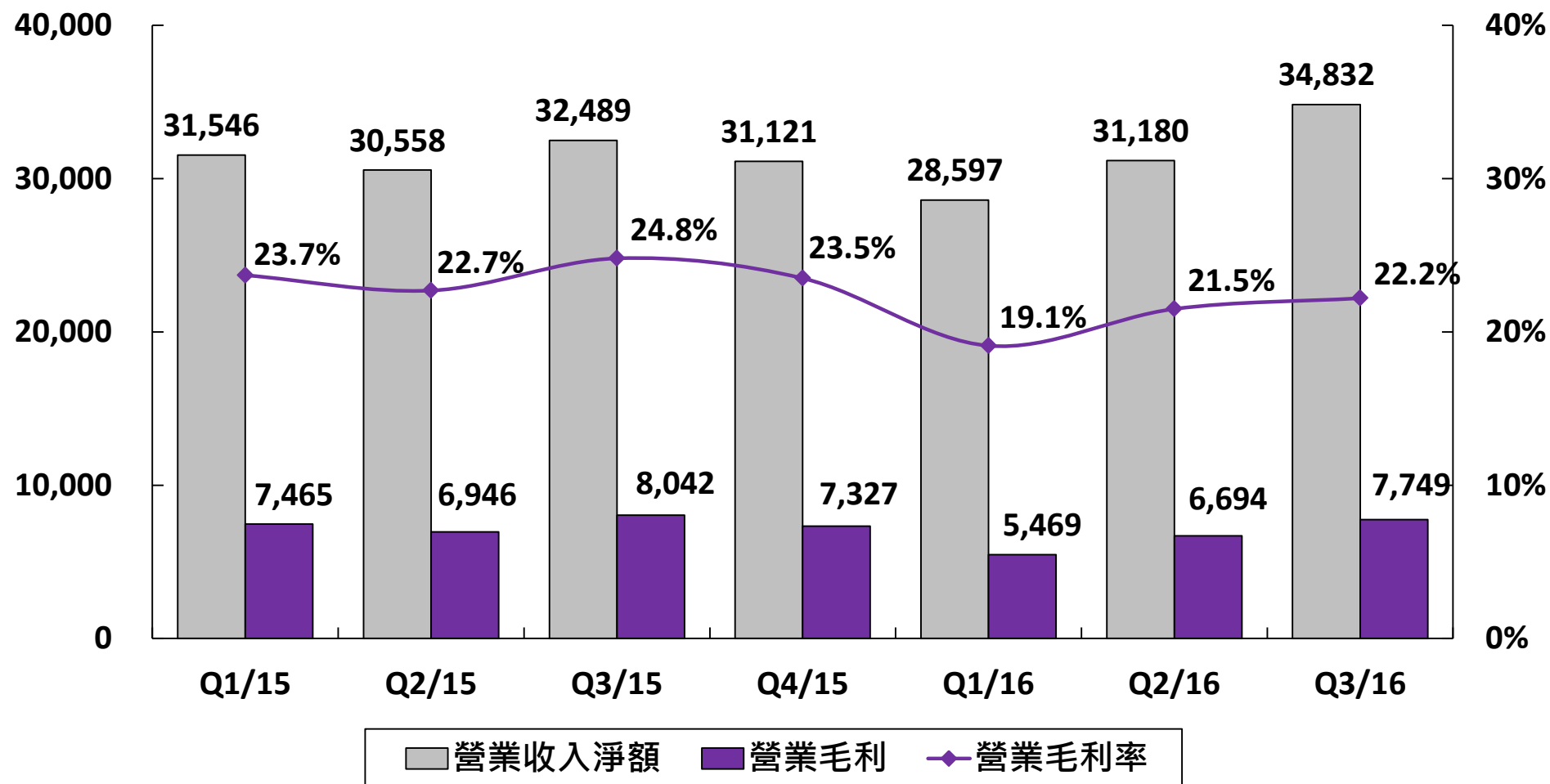


(新台幣百萬元)	Q3 / 2016	%	Q3 / 2015	%	年變化
營業收入淨額:					
封裝	34,832	81.0%	32,489	81.5%	7%
測試	7,232	16.8%	6,426	16.1%	13%
材料直接銷售	920	2.1%	928	2.3%	-1%
其它	22	0.1%	19	0.0%	16%
營業收入淨額合計	43,006	100.0%	39,862	100.0%	8%
營業毛利	10,969	25.5%	10,651	26.7%	3%
營業淨利 (淨損)	6,193	14.4%	5,644	14.2%	10%
稅前淨利 (淨損)	6,319	14.7%	7,433	18.6%	-15%
所得稅利益 (費用)	(719)	-1.7%	(1,016)	-2.5%	
非控制權益	(94)	-0.2%	(49)	-0.1%	
歸屬於本公司業主之淨利	5,506	12.8%	6,368	16.0%	-14%
EBITDA	12,635	29.4%	14,898	37.4%	-15%



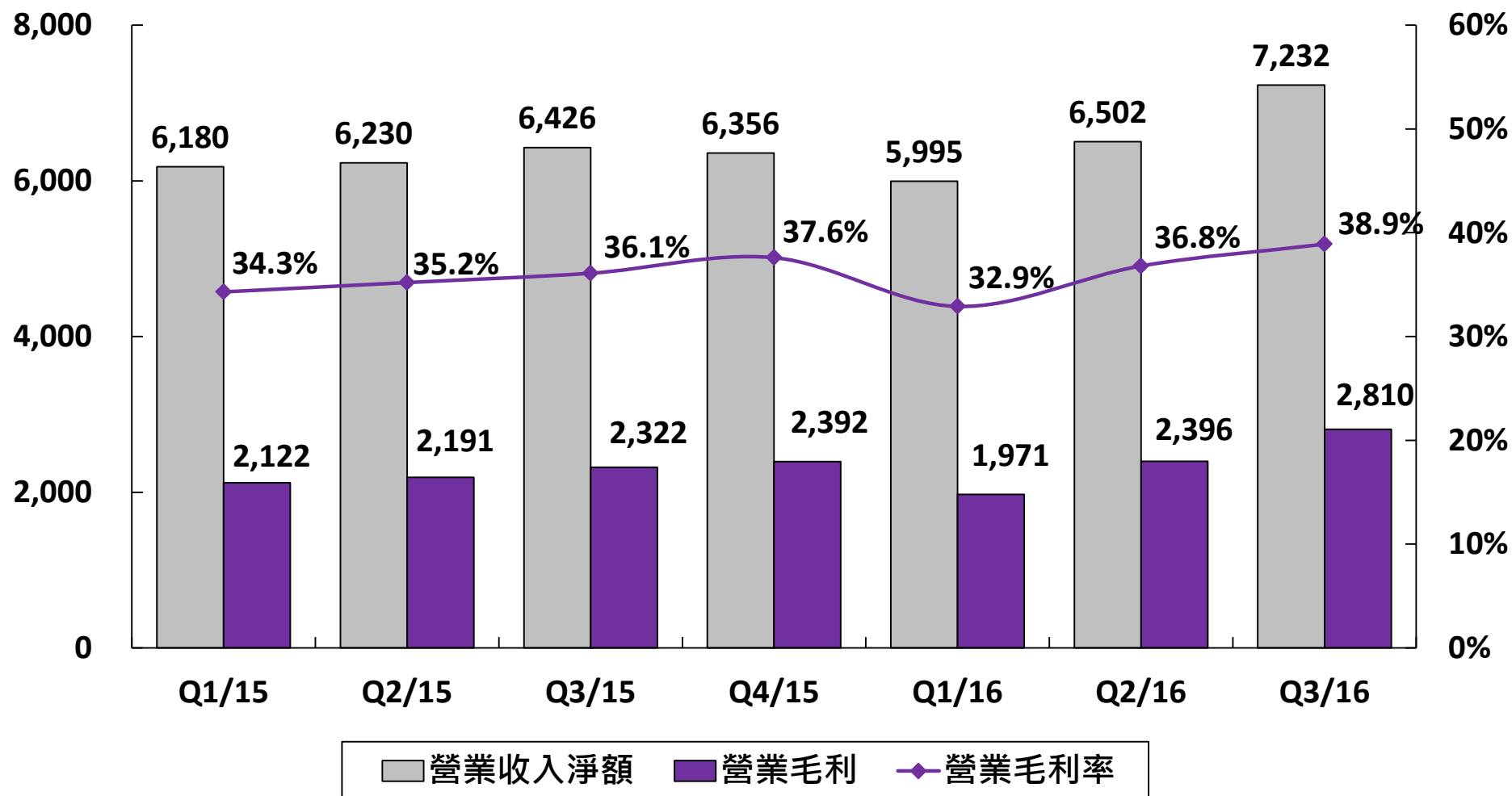
封裝業務

新台幣百萬元



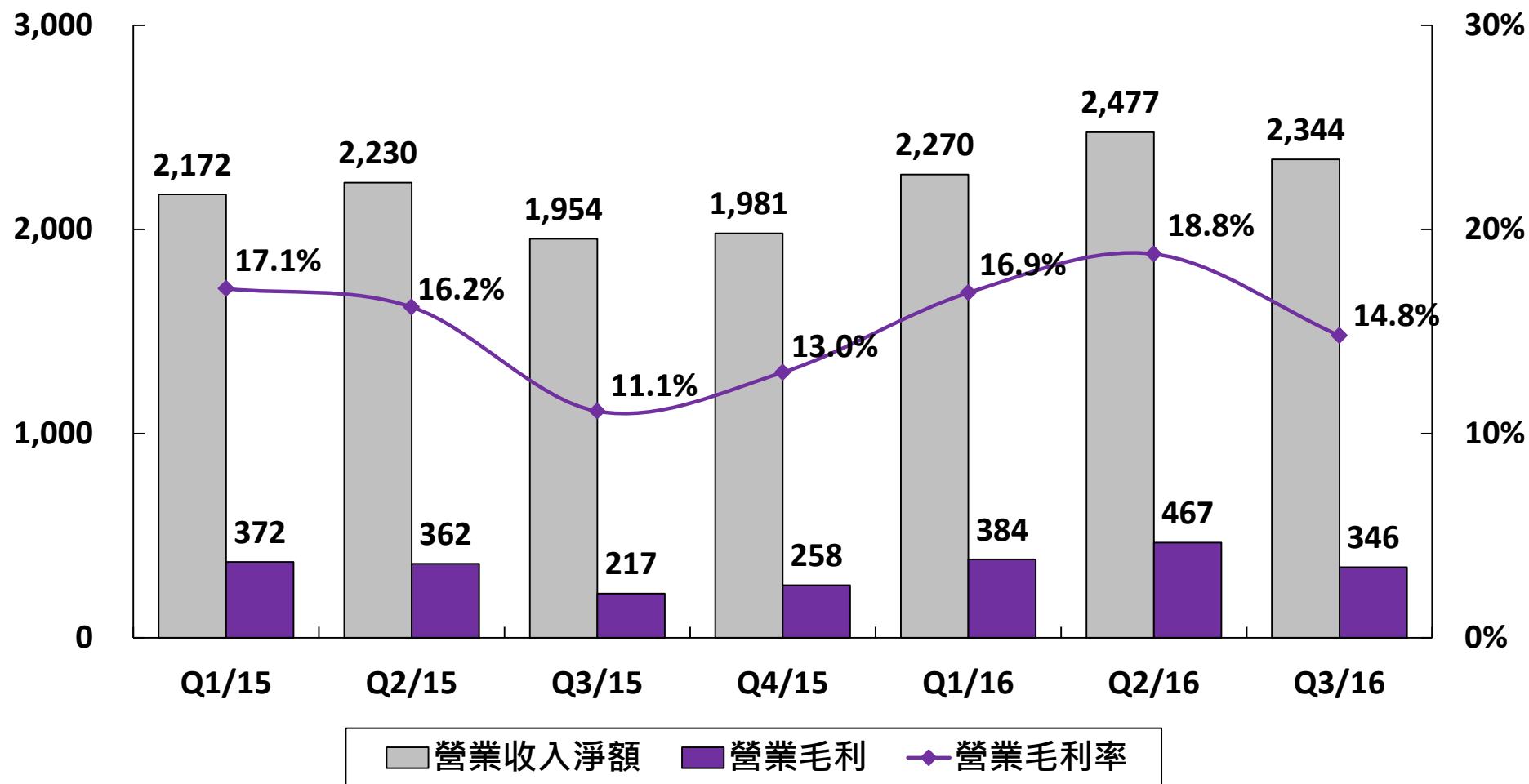
測試業務

新台幣百萬元



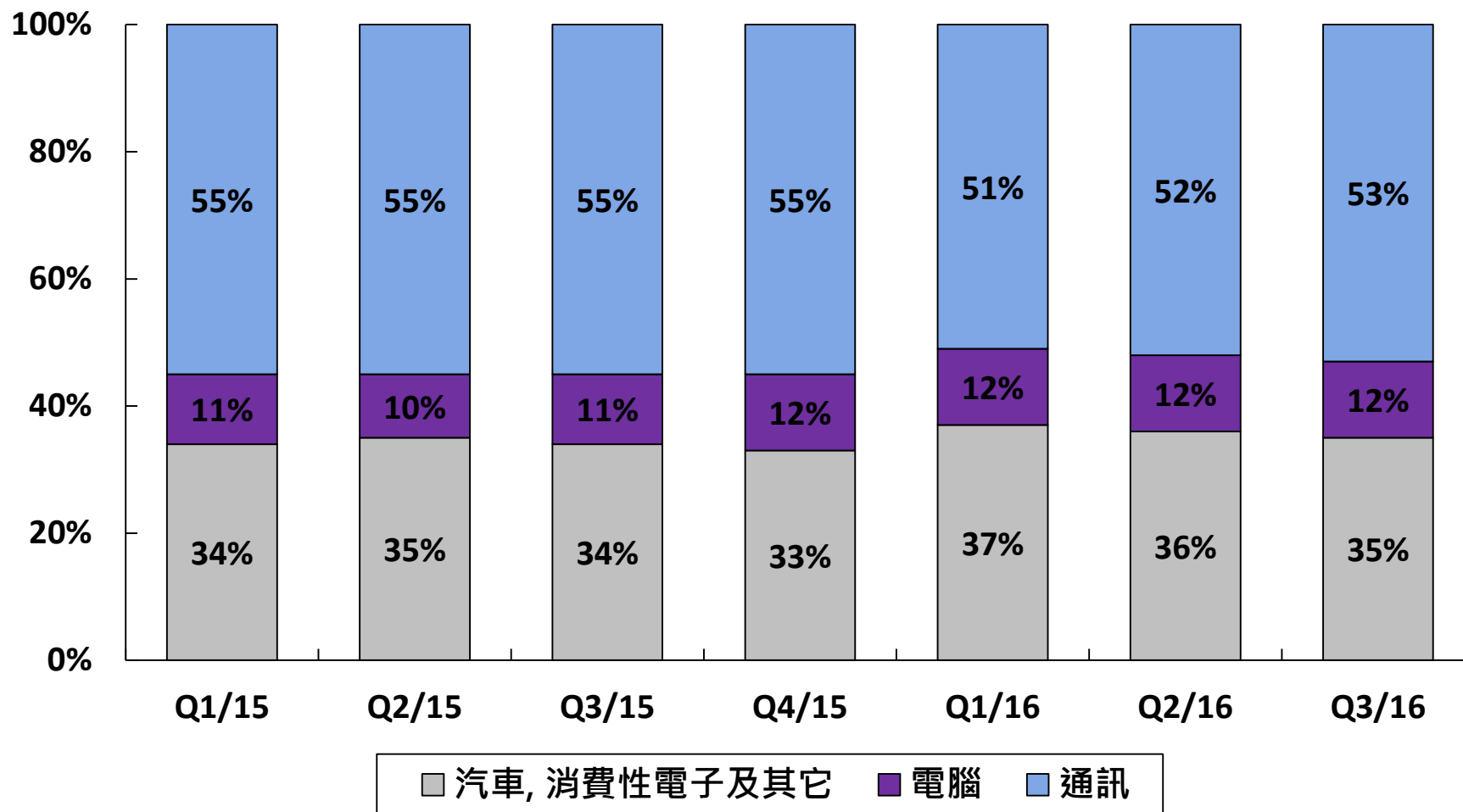
材料業務

新台幣百萬元



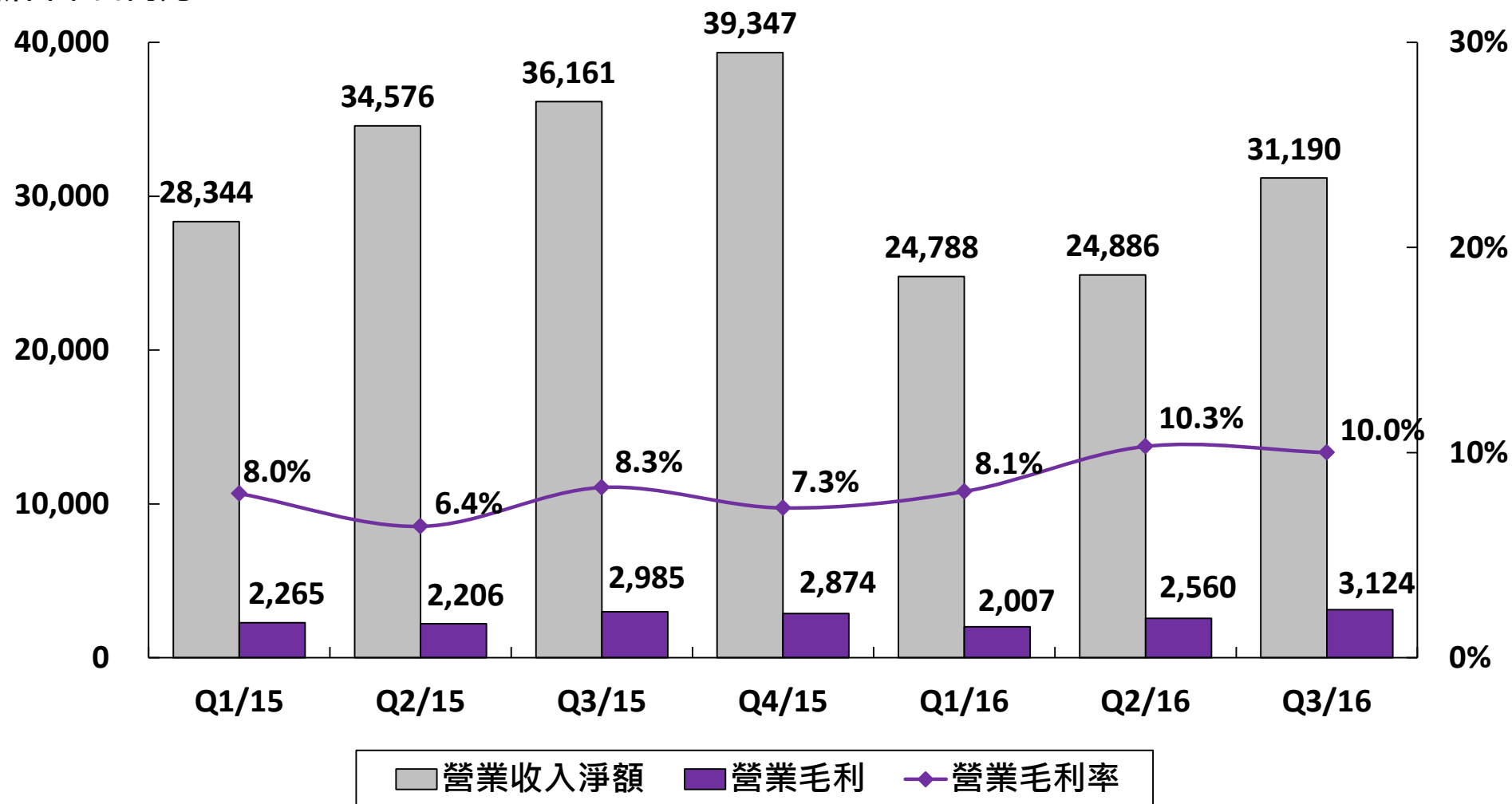
半導體封測營收

產品應用別佔比



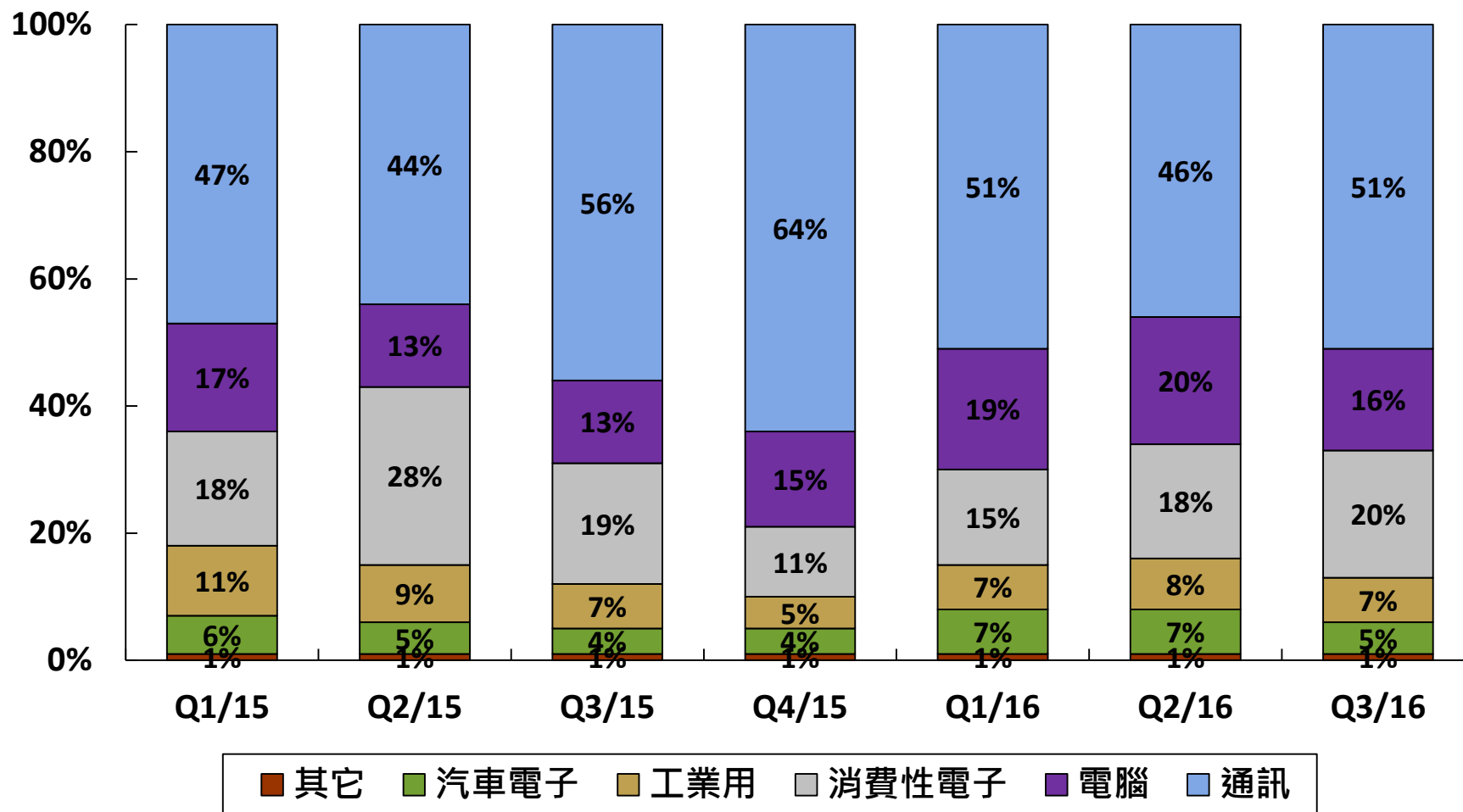
電子代工服務業務

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)



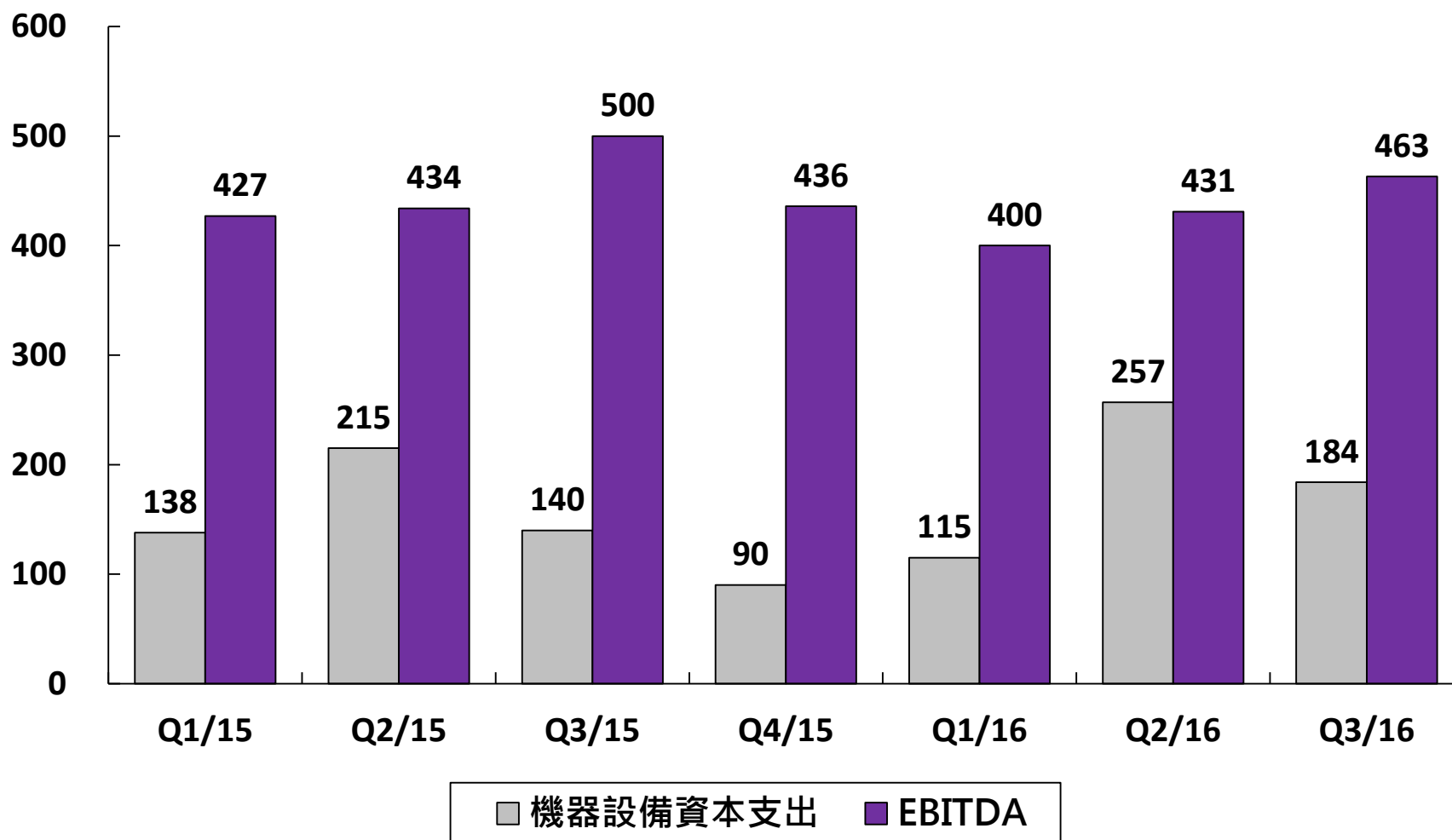
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(新台幣百萬元)	2016年9月30日	2016年6月30日	季變化
現金及約當現金	37,661	36,873	2.1%
金融資產 - 流動	1,931	3,588	-46.2%
金融資產 - 非流動及採用權益法之投資	51,975	49,543	4.9%
不動產、廠房及設備	145,209	147,650	-1.7%
資產總計	360,628	354,029	1.9%
短期借款及應付短期票券	33,007	18,319	80.2%
一年內到期之應付公司債	9,385	22,550	-58.4%
一年內到期之長期借款及應付租賃款	6,384	5,229	22.1%
應付公司債	26,872	24,652	9.0%
長期借款及應付租賃款	44,255	39,664	11.6%
權益總計 (含非控制權益)	161,218	159,316	1.2%
當季 EBITDA	14,701	13,977	5.2%
流動比率	1.21	1.13	
負債權益比率	0.50	0.44	



機器設備資本支出及EBITDA

美金百萬元



2016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2016年第四季的業績展望如下：

- 半導體封測事業產能將較前季持平
- 半導體封測事業利用率將較前季下滑零到百分之五
- 半導體封測事業毛利率將與前季相仿
- 電子代工服務產能將較前季持平
- 電子代工服務產能利用率將較前季成長百分之十到百分之十五
- 電子代工服務毛利率將與2016年前半年之毛利率相仿



Thank You

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