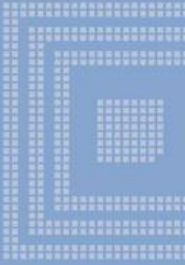




ASE GROUP



日月光半導體 2017第三季法人說明會

2017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. 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 uncertainties as to whether we can complete the share exchange contemplated by a joint share exchange agreement between Siliconware Precision Industries Co., Ltd. and us; 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 2016 Annual Report on Form 20-F filed on April 21, 2017.



日月光及矽品共同轉換股份協議最新消息

- 台灣公平交易委員會已於2016年11月16日核准通過日月光與矽品結合案。
- 日月光於2017年5月16日收到美國聯邦貿易委員會之正式確認函，表示就本結合案所展開之非公開調查程序已告終止，且美國聯邦貿易委員會目前亦認為無需採取任何後續作為。
- 日月光與矽品於2016年8月25日向中國商務部遞交文件，並經過第一、二、三階段審查。鑑於商務部尚需更多時間審查本結合案，本公司遂遞件向商務部撤回原申請並再行遞件申請進行本結合案（下稱「再申請案」）。本公司於2017年6月6日分別接獲商務部准予本公司撤回原申請以及就再申請案准予立案之通知。日月光與矽品於2017年9月30日接獲商務部通知本案進入第三階段審查。本公司與矽品將持續依共同轉換股份協議約定以及相關法令規定，推動本結合案之進行。

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 / 2017	%	Q2 / 2017	%	季變化
營業收入淨額:					
封裝	32,880	44.5%	30,494	46.2%	8%
測試	6,889	9.3%	6,350	9.6%	8%
材料直接銷售	948	1.3%	928	1.4%	2%
電子代工服務	33,098	44.8%	28,210	42.7%	17%
其它	63	0.1%	44	0.1%	43%
營業收入淨額合計	73,878	100.0%	66,026	100.0%	12%
營業毛利	13,848	18.7%	12,116	18.4%	14%
營業淨利 (淨損)	7,068	9.6%	5,219	7.9%	35%
稅前淨利 (淨損)	7,815	10.6%	11,390	17.3%	-31%
所得稅利益 (費用)	(1,083)	-1.5%	(3,207)	-4.9%	
非控制權益	(396)	-0.5%	(336)	-0.5%	
歸屬於本公司業主之淨利	6,336	8.6%	7,847	11.9%	-19%
基本每股盈餘 (新台幣元)	0.76		0.97		-22%
稀釋每股盈餘 (新台幣元)	0.69		0.89		-22%
EBITDA	15,243	20.6%	19,085	28.9%	-20%



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 / 2017	%	Q3 / 2016	%	年變化
營業收入淨額:					
封裝	32,880	44.5%	33,449	46.0%	-2%
測試	6,889	9.3%	7,231	9.9%	-5%
材料直接銷售	948	1.3%	805	1.1%	18%
電子代工服務	33,098	44.8%	31,174	42.8%	6%
其它	63	0.1%	125	0.2%	-50%
營業收入淨額合計	73,878	100.0%	72,784	100.0%	2%
營業毛利	13,848	18.7%	14,111	19.4%	-2%
營業淨利 (淨損)	7,068	9.6%	7,436	10.2%	-5%
稅前淨利 (淨損)	7,815	10.6%	6,870	9.4%	14%
所得稅利益 (費用)	(1,083)	-1.5%	(976)	-1.3%	
非控制權益	(396)	-0.5%	(392)	-0.5%	
歸屬於本公司業主之淨利	6,336	8.6%	5,502	7.6%	15%
基本每股盈餘 (新台幣元)	0.76		0.72		6%
稀釋每股盈餘 (新台幣元)	0.69		0.64		8%
EBITDA	15,243	20.6%	14,701	20.2%	4%



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 / 2017	%	Q2 / 2017	%	季變化
營業收入淨額:					
封裝	33,897	81.0%	31,718	81.2%	7%
測試	6,889	16.5%	6,350	16.3%	8%
材料直接銷售	1,048	2.5%	960	2.5%	9%
其它	20	0.0%	20	0.1%	0%
營業收入淨額合計	41,854	100.0%	39,048	100.0%	7%
營業毛利	10,486	25.1%	9,027	23.1%	16%
營業淨利 (淨損)	5,724	13.7%	4,102	10.5%	40%
稅前淨利 (淨損)	7,205	17.2%	9,462	24.2%	-24%
所得稅利益 (費用)	(784)	-1.9%	(1,541)	-3.9%	
非控制權益	(85)	-0.2%	(74)	-0.2%	
歸屬於本公司業主之淨利	6,336	15.1%	7,847	20.1%	-19%
EBITDA	13,175	31.5%	11,522	29.5%	14%



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 / 2017	%	Q3 / 2016	%	年變化
營業收入淨額:					
封裝	33,897	81.0%	34,832	81.0%	-3%
測試	6,889	16.5%	7,232	16.8%	-5%
材料直接銷售	1,048	2.5%	920	2.1%	14%
其它	20	0.0%	22	0.1%	-9%
營業收入淨額合計	41,854	100.0%	43,006	100.0%	-3%
營業毛利	10,486	25.1%	10,966	25.5%	-4%
營業淨利 (淨損)	5,724	13.7%	6,190	14.4%	-8%
稅前淨利 (淨損)	7,205	17.2%	6,314	14.7%	14%
所得稅利益 (費用)	(784)	-1.9%	(719)	-1.7%	
非控制權益	(85)	-0.2%	(93)	-0.2%	
歸屬於本公司業主之淨利	6,336	15.1%	5,502	12.8%	15%
EBITDA	13,175	31.5%	12,635	29.4%	4%

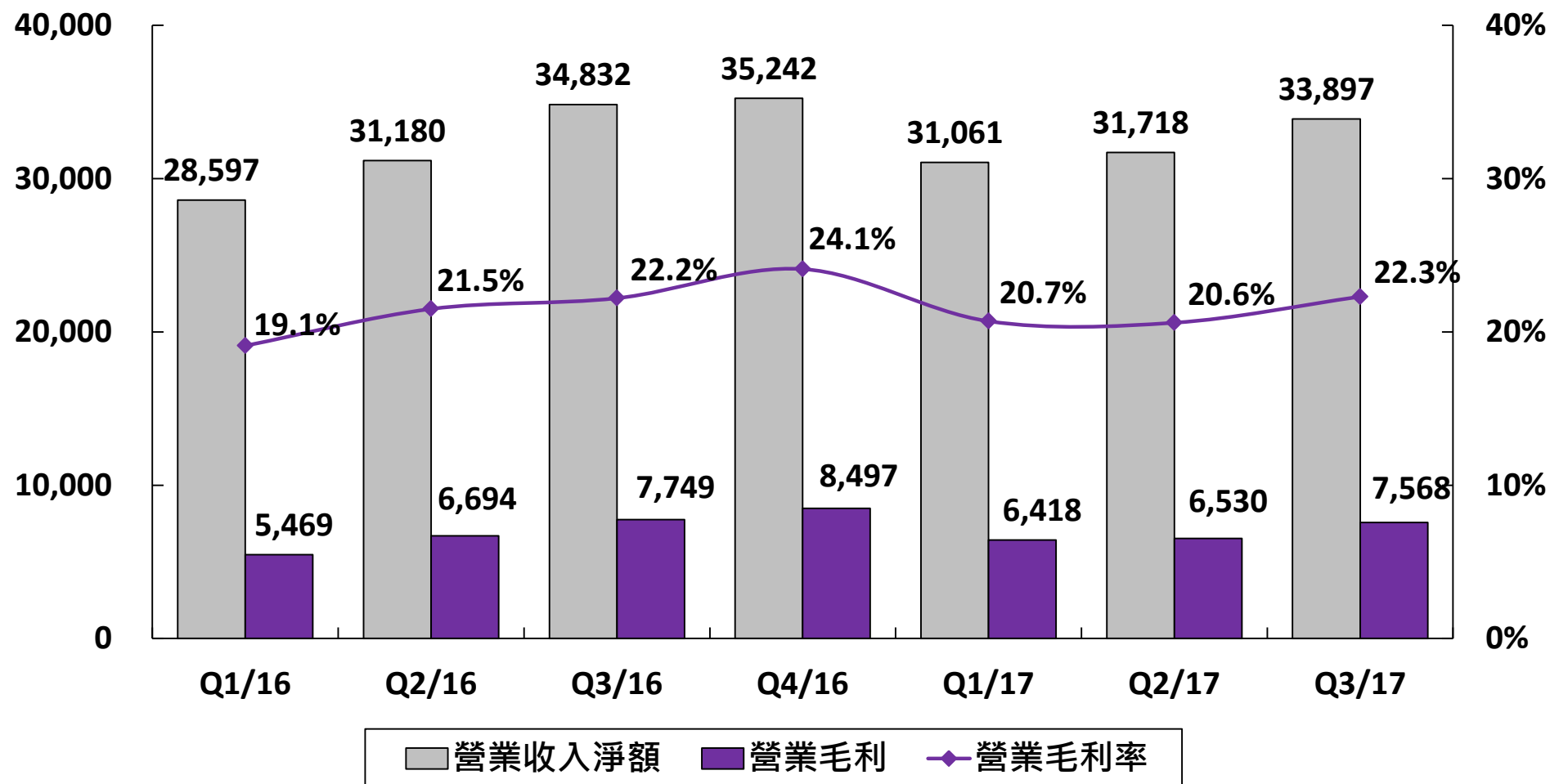


封裝業務

(未經會計師查核)



新台幣百萬元

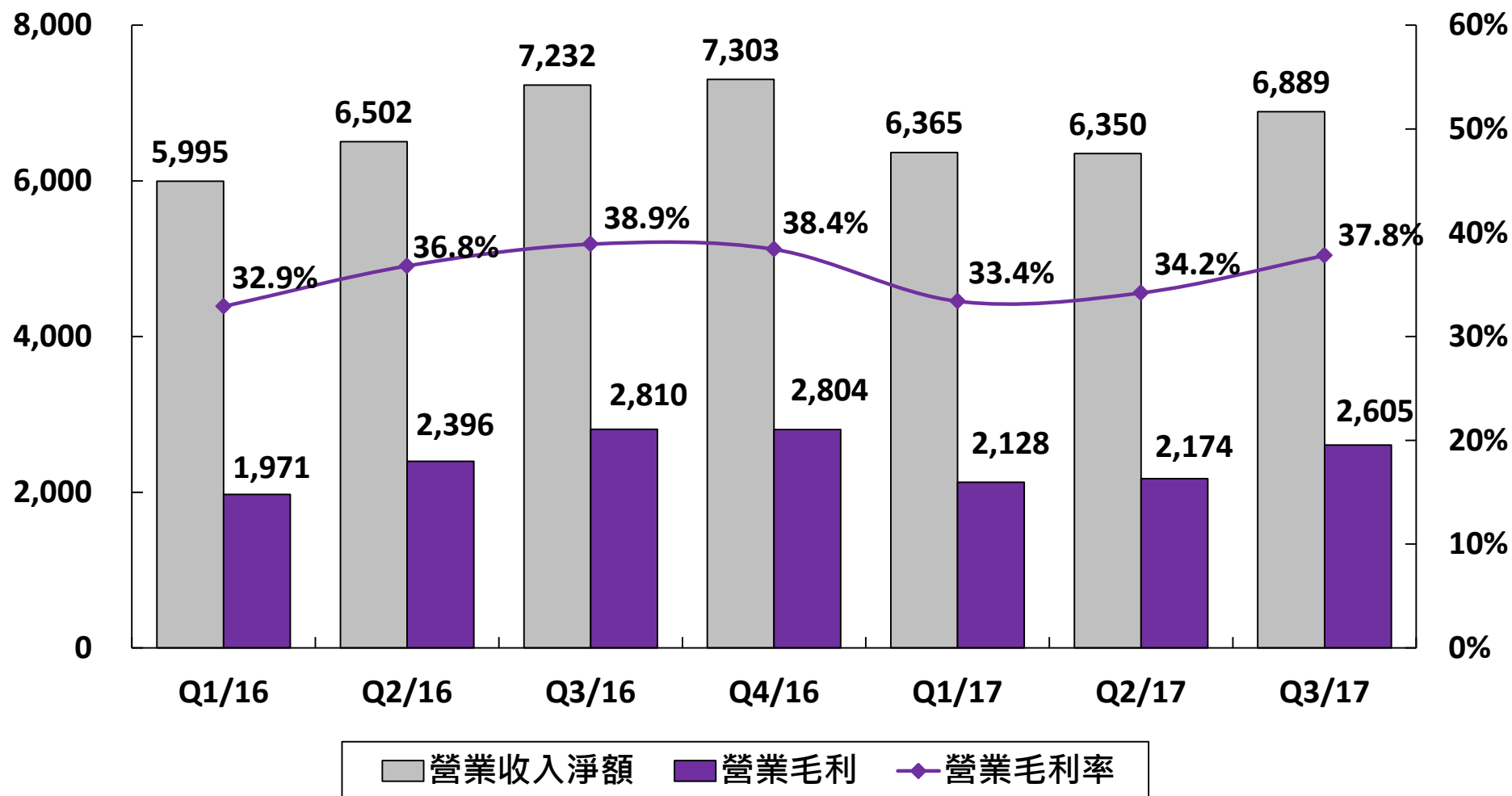


測試業務

(未經會計師查核)



新台幣百萬元

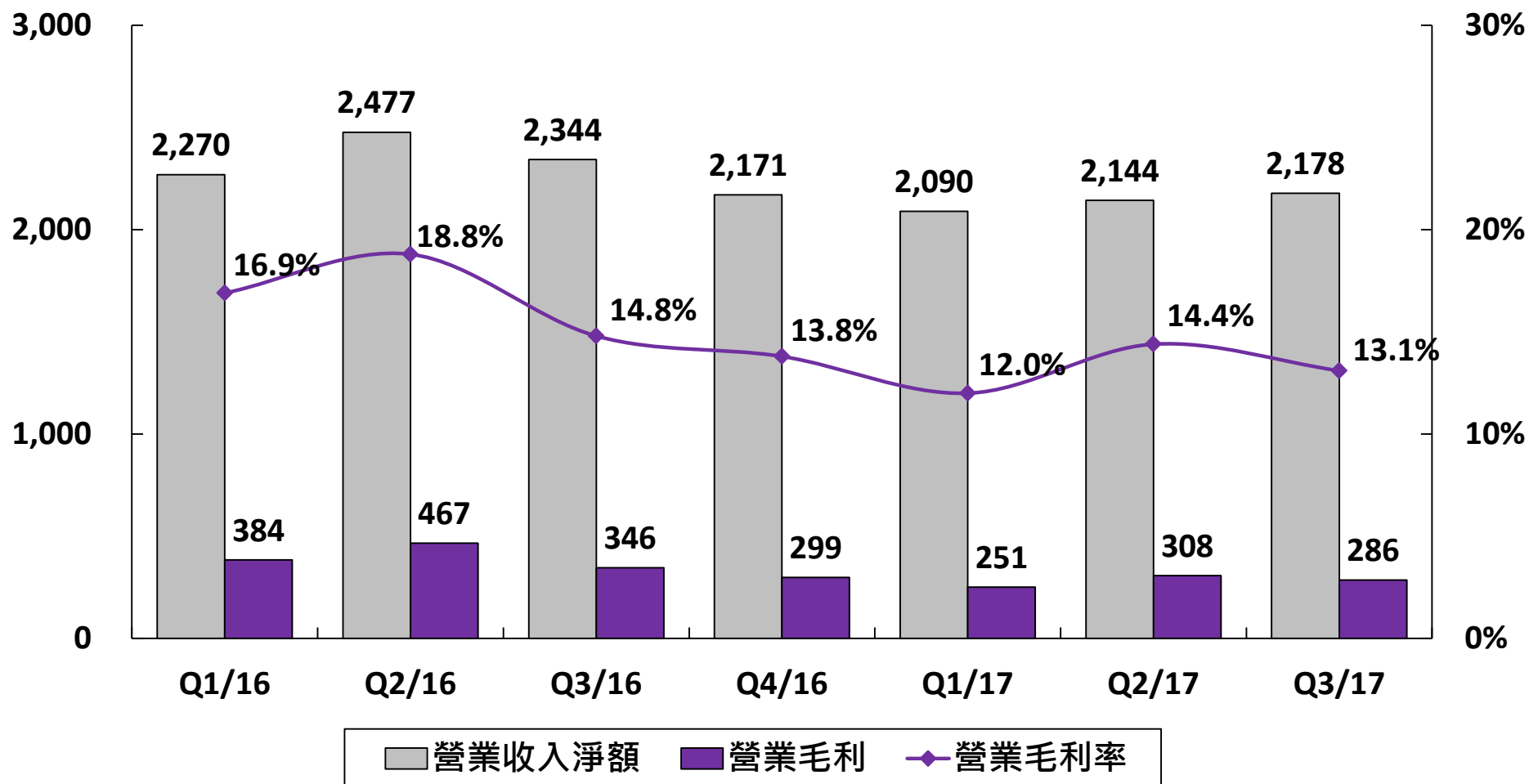


材料業務

(未經會計師查核)



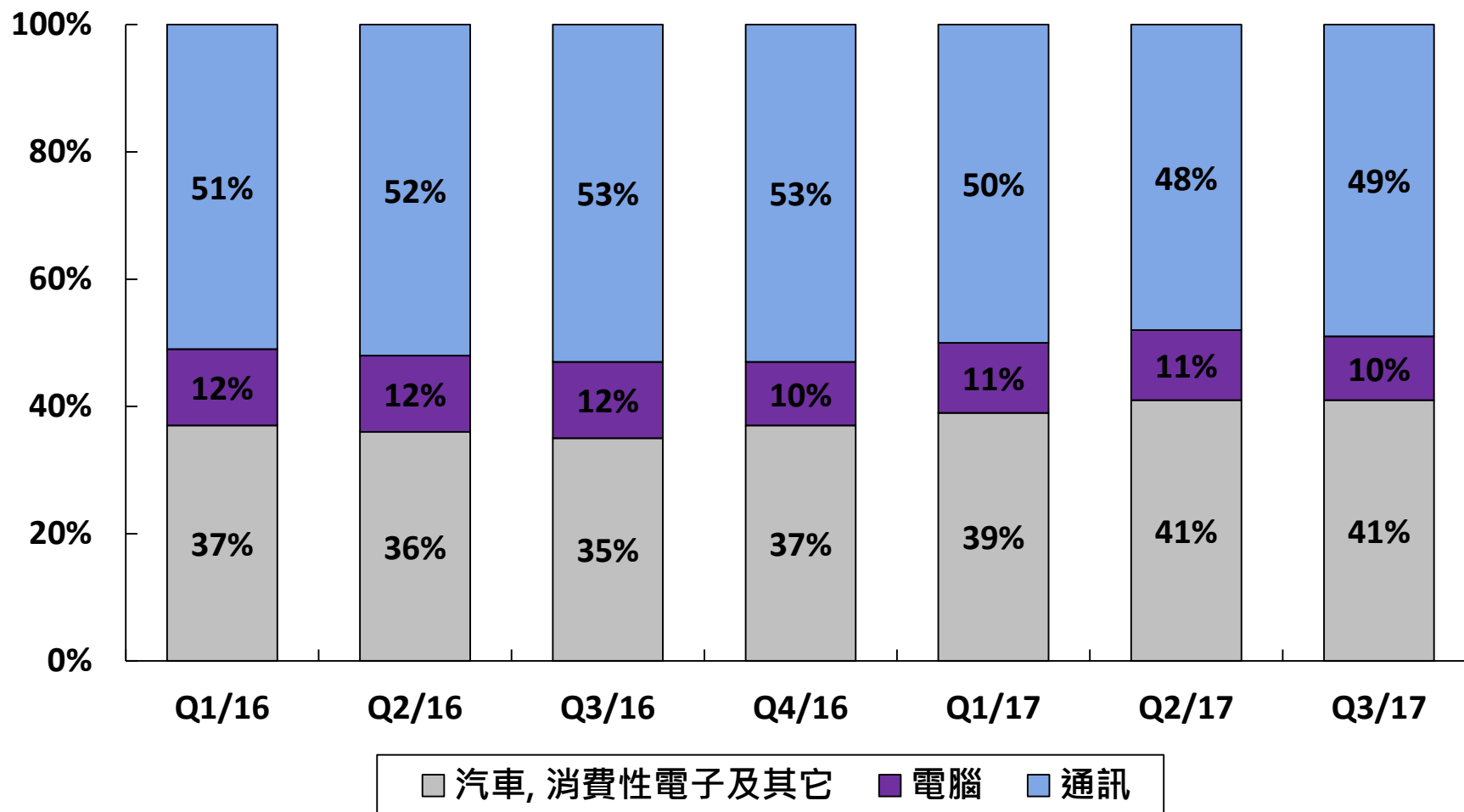
新台幣百萬元



半導體封測營收

產品應用別佔比

(未經會計師查核)

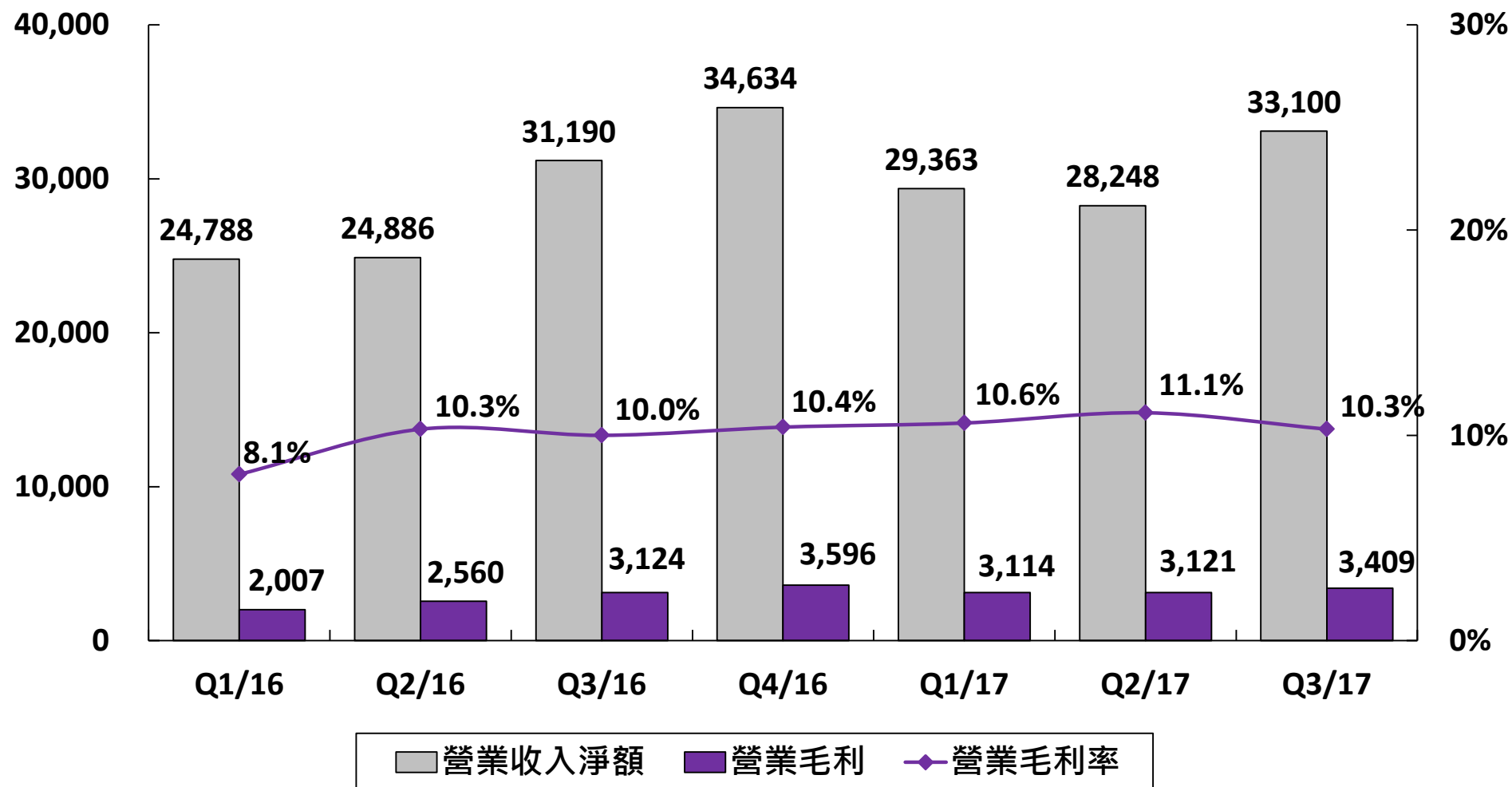


電子代工服務業務

(未經會計師查核)



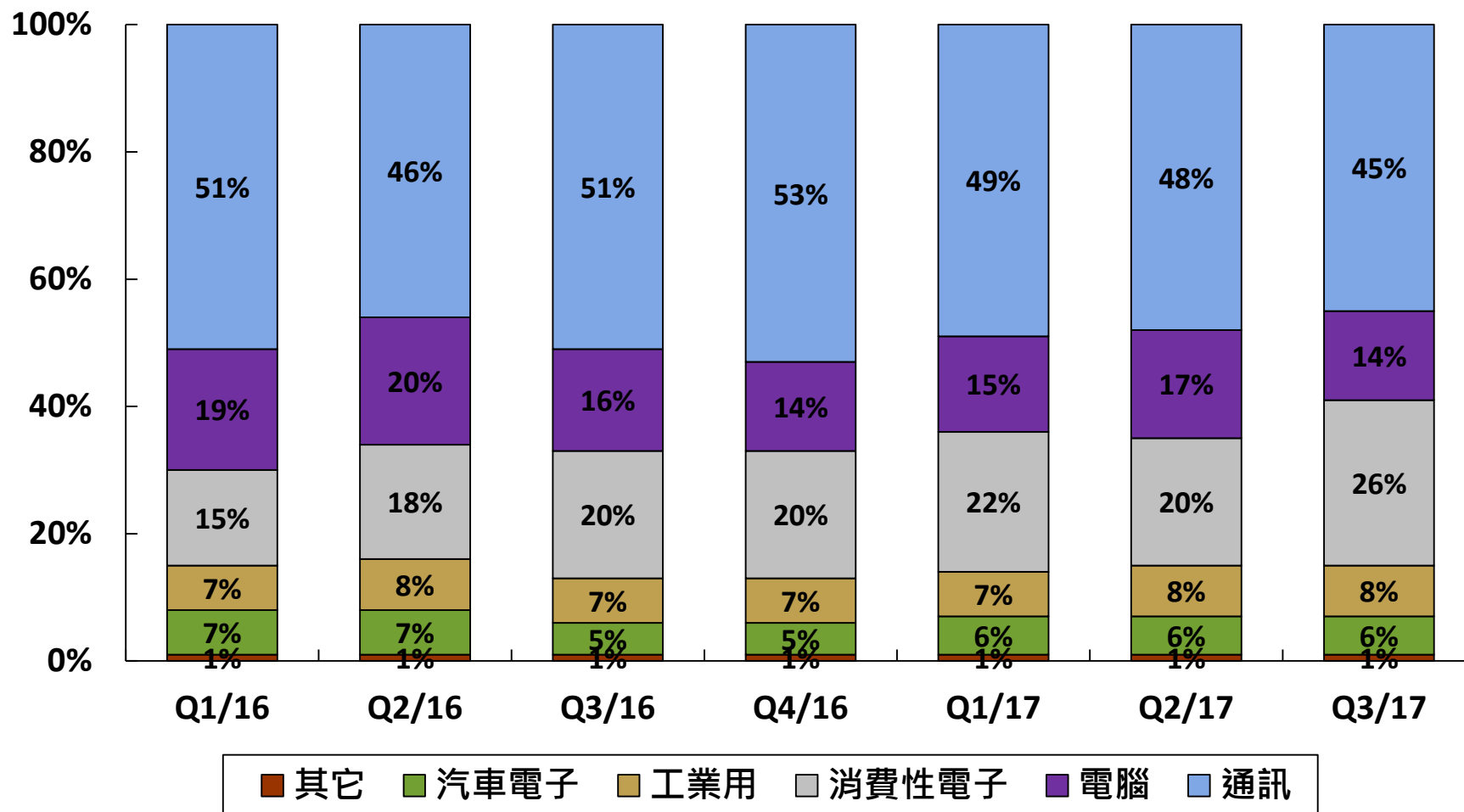
新台幣百萬元



電子代工服務業務

產品應用別

(未經會計師查核)



重要資產負債表項目及財務指標

(未經會計師查核)



(新台幣百萬元)	2017年9月30日	2017年6月30日	季變化
現金及約當現金	38,975	43,891	-11.2%
金融資產 - 流動	3,989	4,138	-3.6%
金融資產 - 非流動及採用權益法之投資	51,107	50,878	0.5%
不動產、廠房及設備	136,982	140,378	-2.4%
資產總計	359,999	356,623	0.9%
短期借款及應付短期票券	19,638	14,209	38.2%
一年內到期之應付公司債	6,137	15,236	-59.7%
一年內到期之長期借款及應付租賃款	6,882	7,454	-7.7%
應付公司債	16,981	25,845	-34.3%
長期借款及應付租賃款	32,908	28,823	14.2%
權益總計 (含非控制權益)	197,956	179,063	10.6%
當季 EBITDA	15,243	19,085	-20.1%
流動比率	1.37	1.30	
負債權益比率	0.20	0.24	

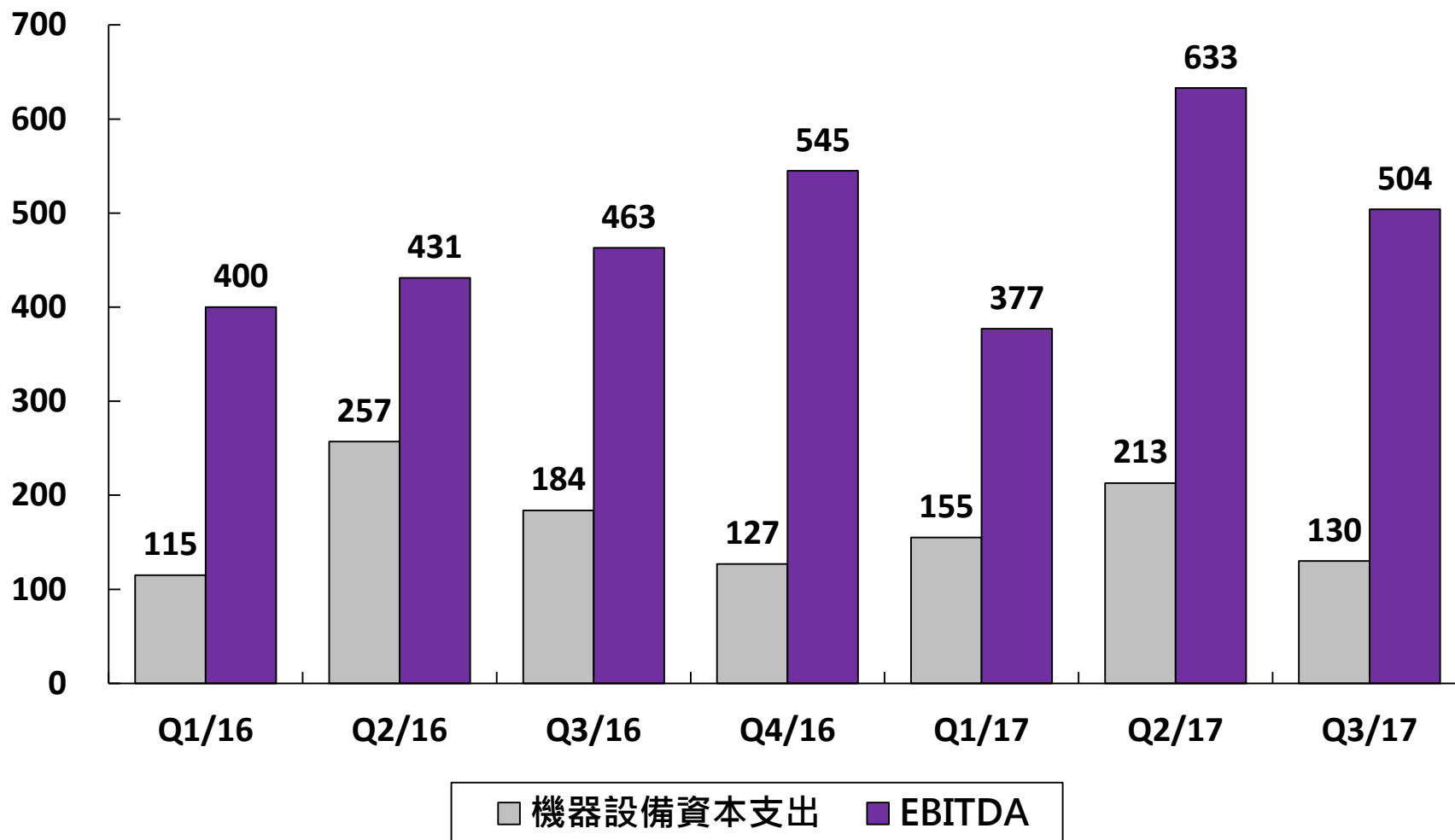


機器設備資本支出及EBITDA

(未經會計師查核)



美金百萬元



2017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2017年第四季的業績展望如下：

- 半導體封測事業第四季生意量與毛利率將相當於今年第三季水準；
- 電子代工服務第四季生意量將相當於半導體封測事業今年第四季生意量；
- 電子代工服務第四季毛利率將略高於去年第一季水準。



Thank You

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