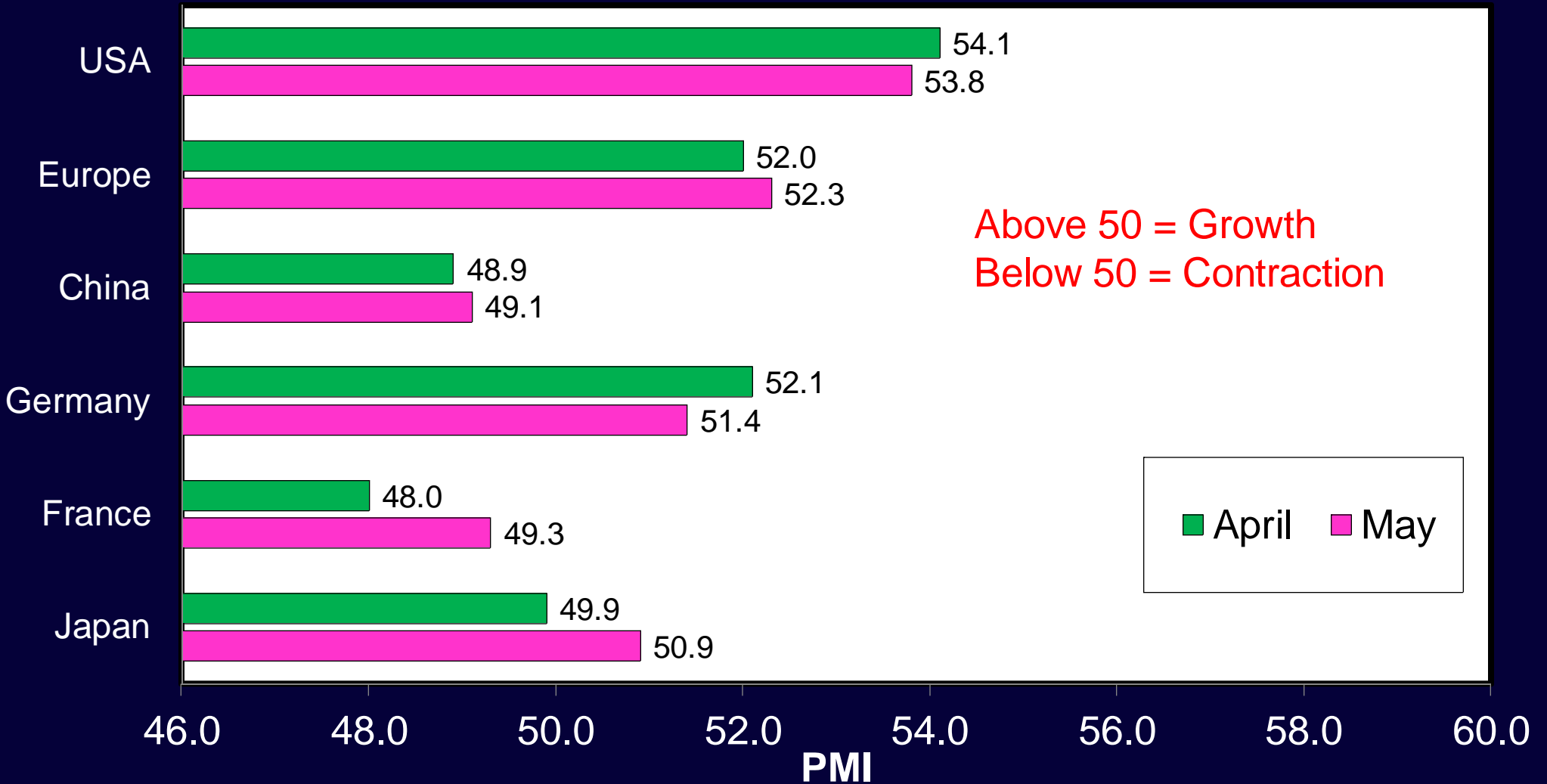


Chart 1

Purchasing Managers' Indices April vs. May 2015 (preliminary)



U.S "Purchasing Managers" Indices

Markit Economics

Diffusion Index, >50 = Growth

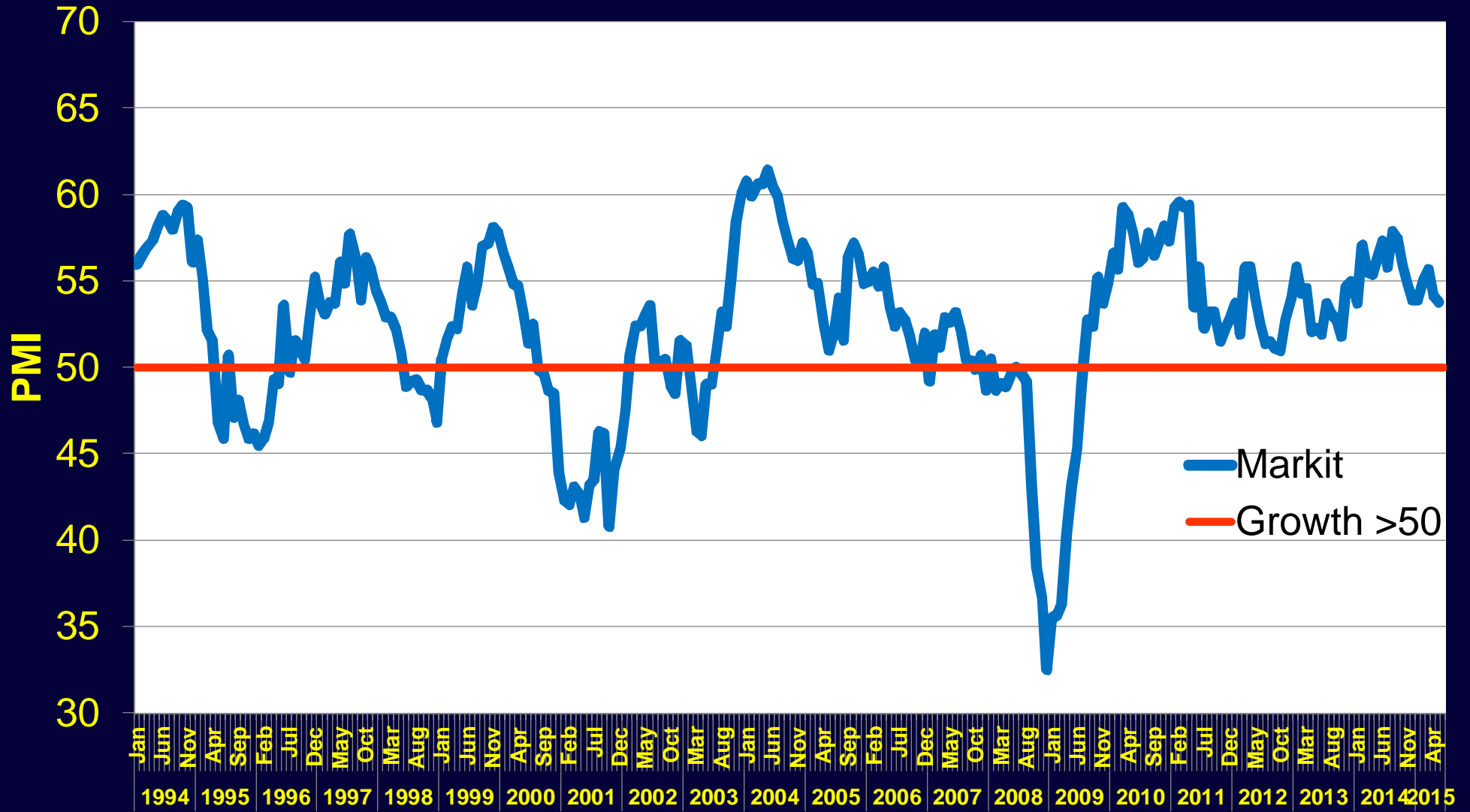
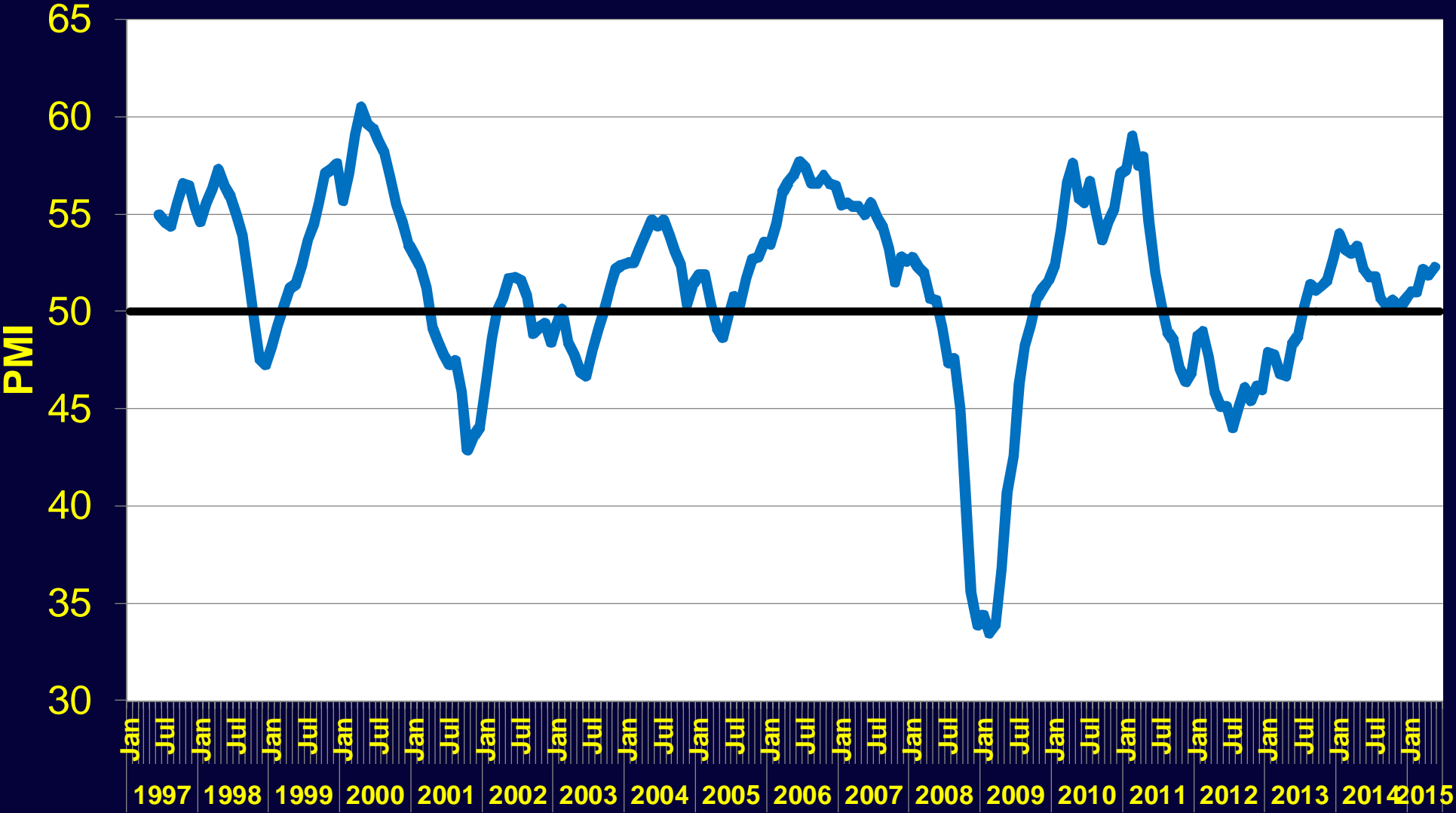


Chart 3

Eurozone "Purchasing Managers" Index

Diffusion Index, >50 = Growth



China "Purchasing Managers" Index

Diffusion Index, >50 = Growth

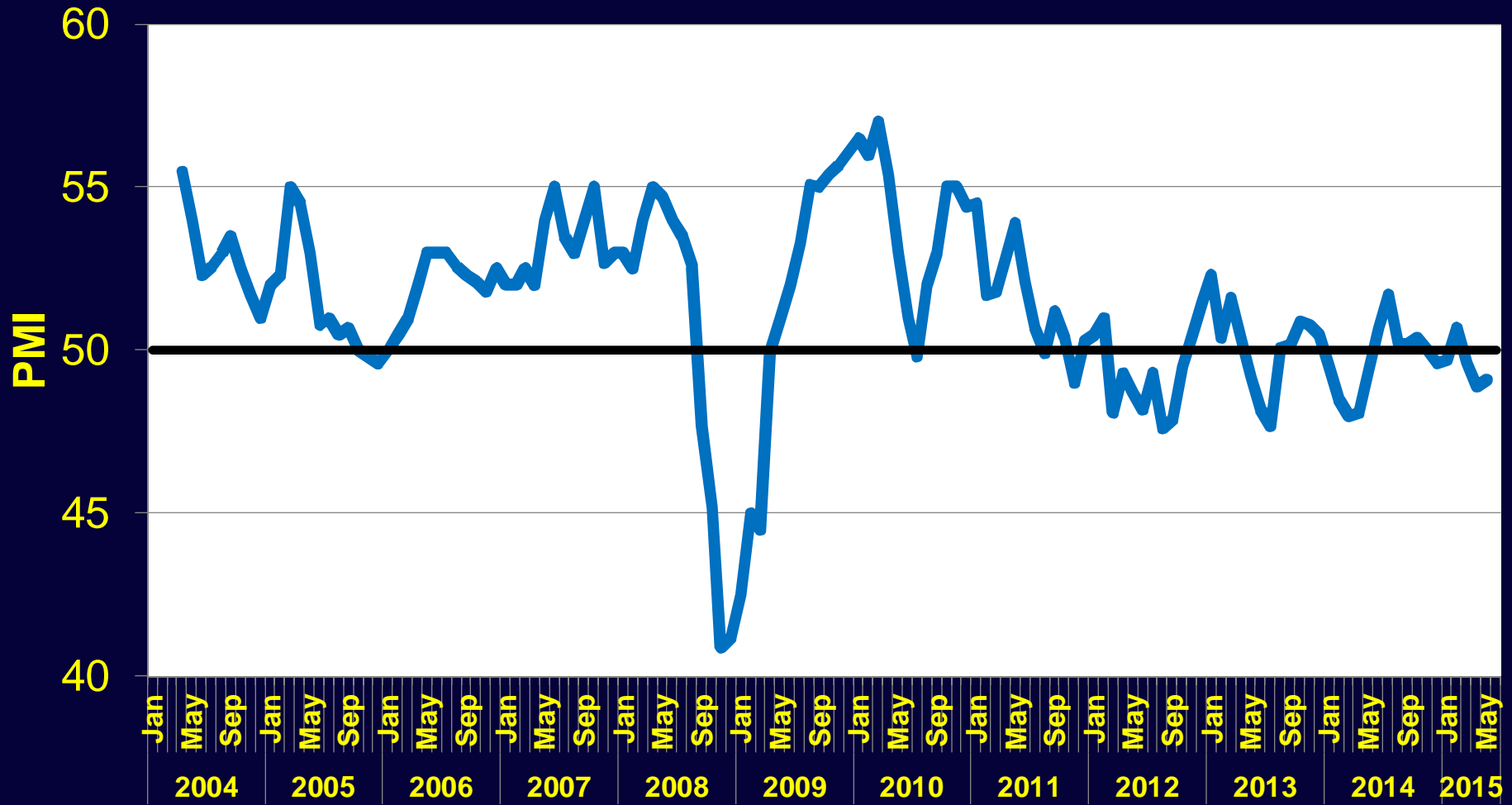


Chart 5

Japan "Purchasing Managers" Index

Diffusion Index, >50 = Growth

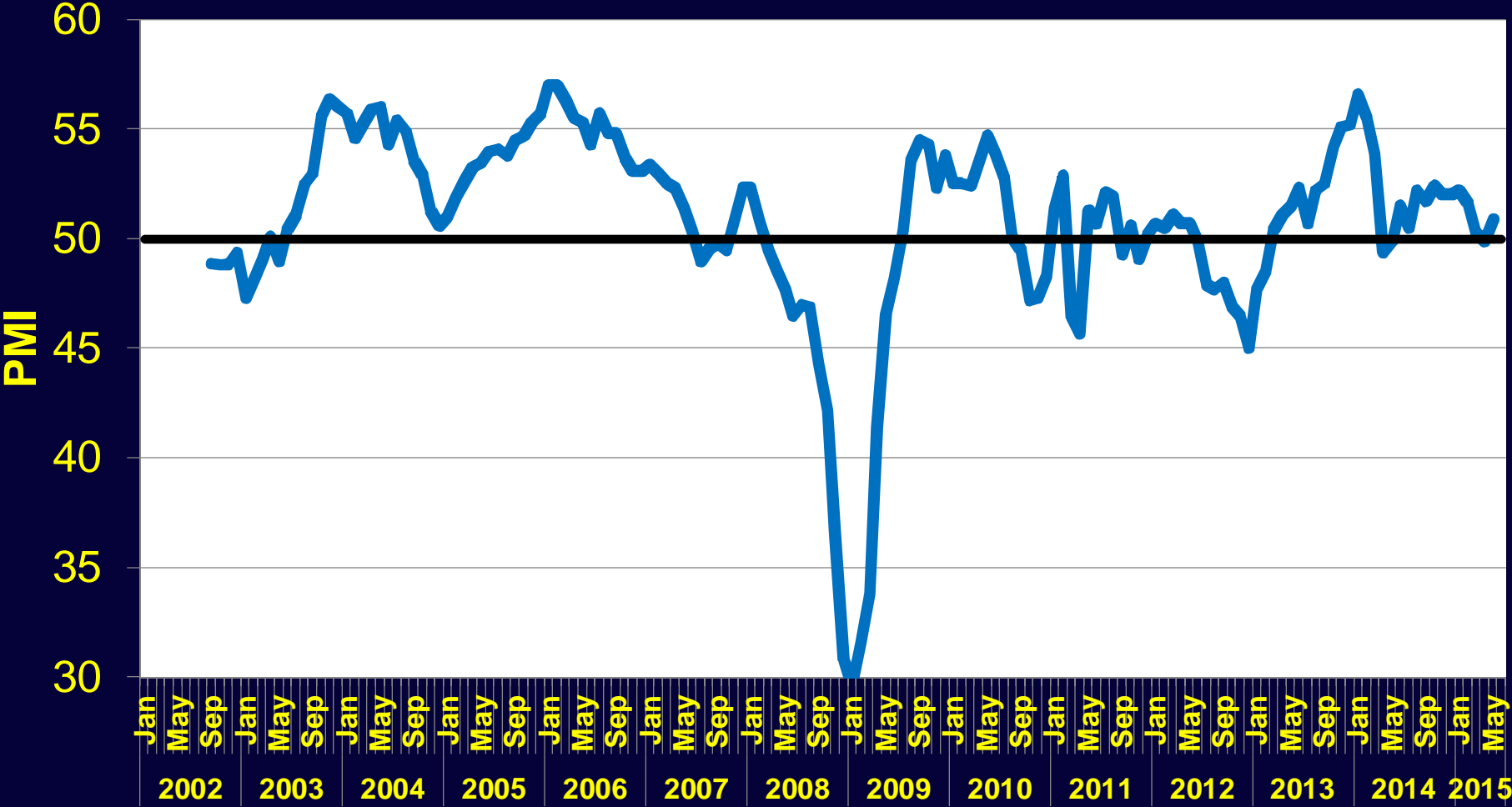
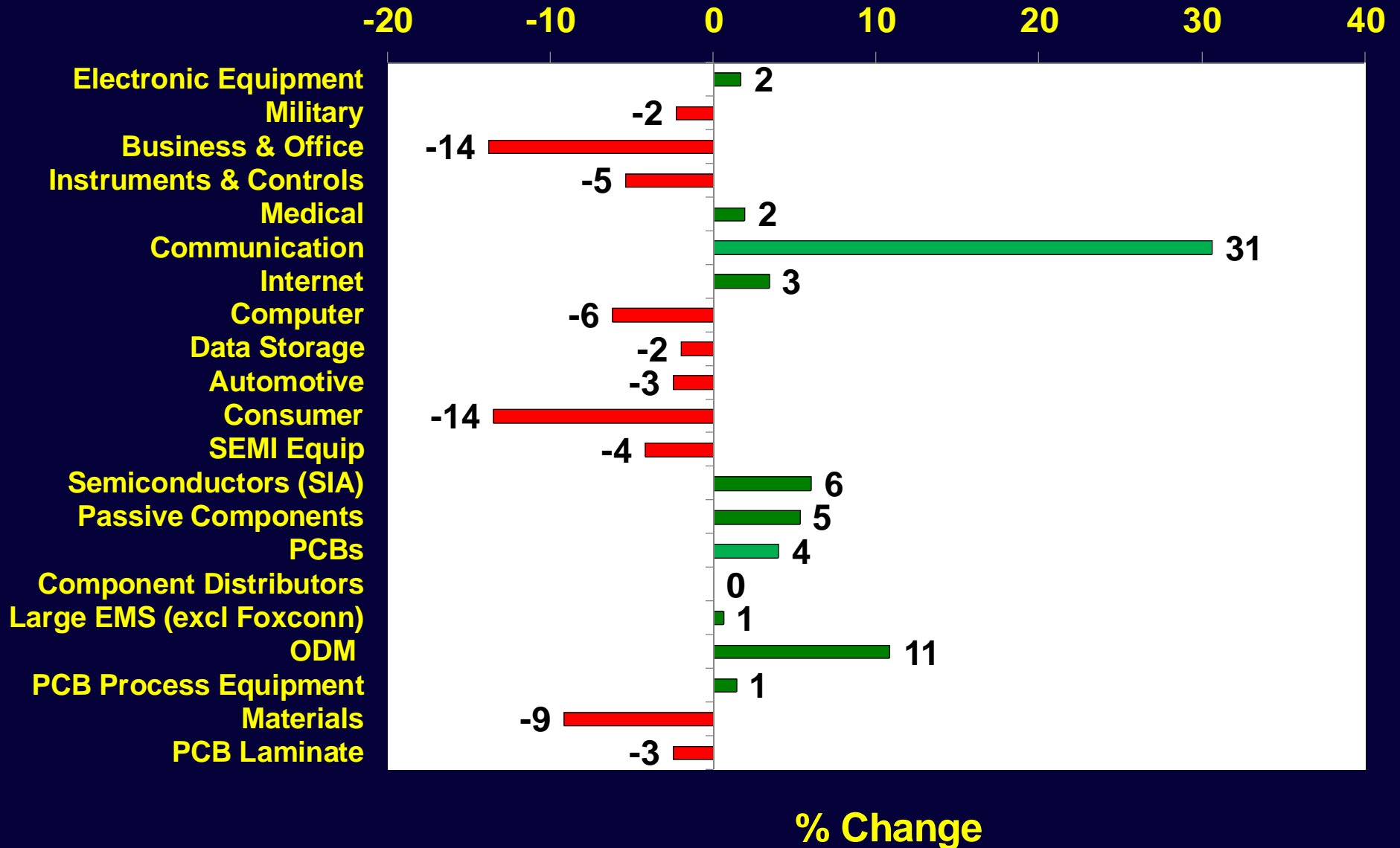


Chart 6

Global Electronic Supply Chain Growth 1Q'15 vs. 1Q'14

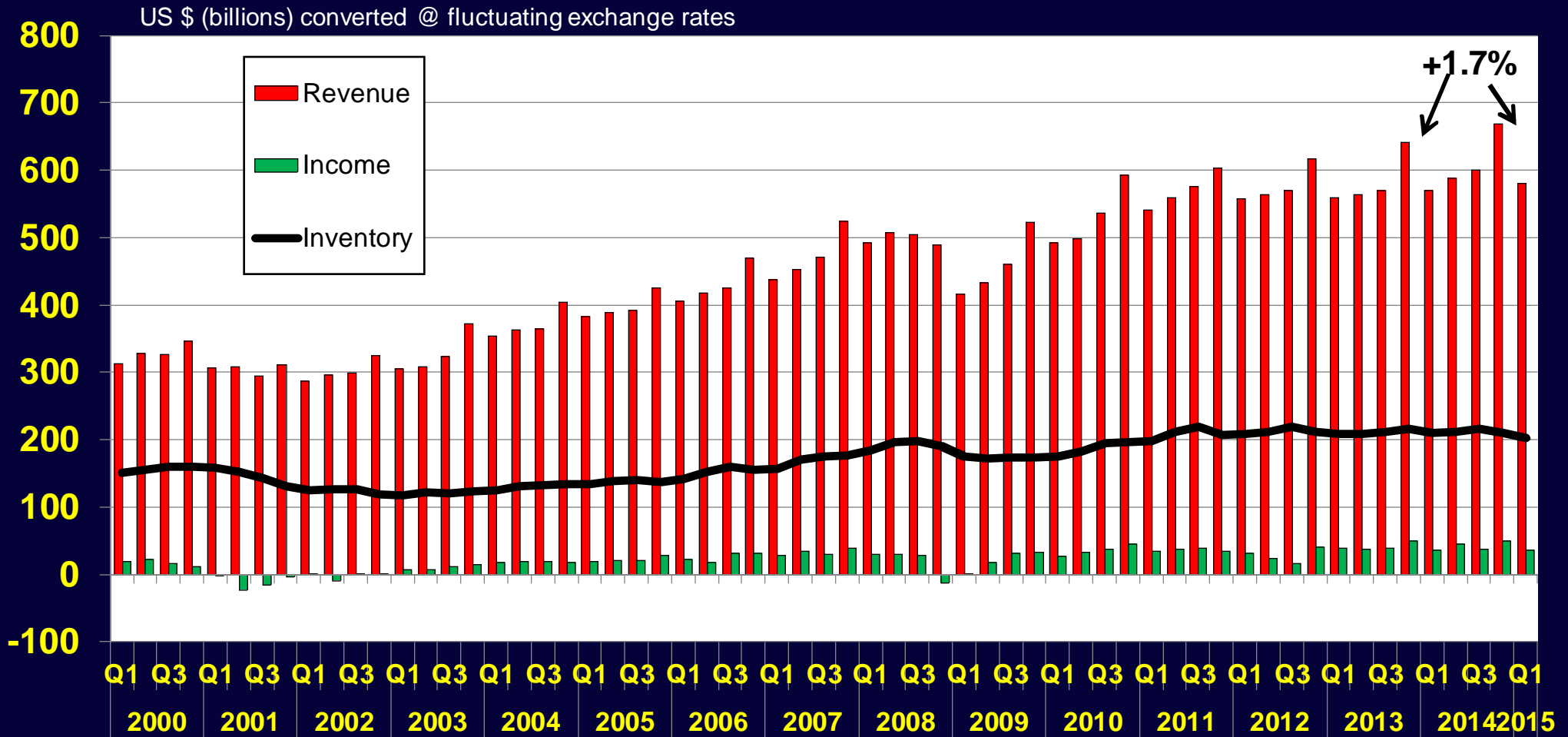


US\$ equivalent at fluctuating exchange; based upon industry composites including acquisitions

Electronic Equipment Suppliers

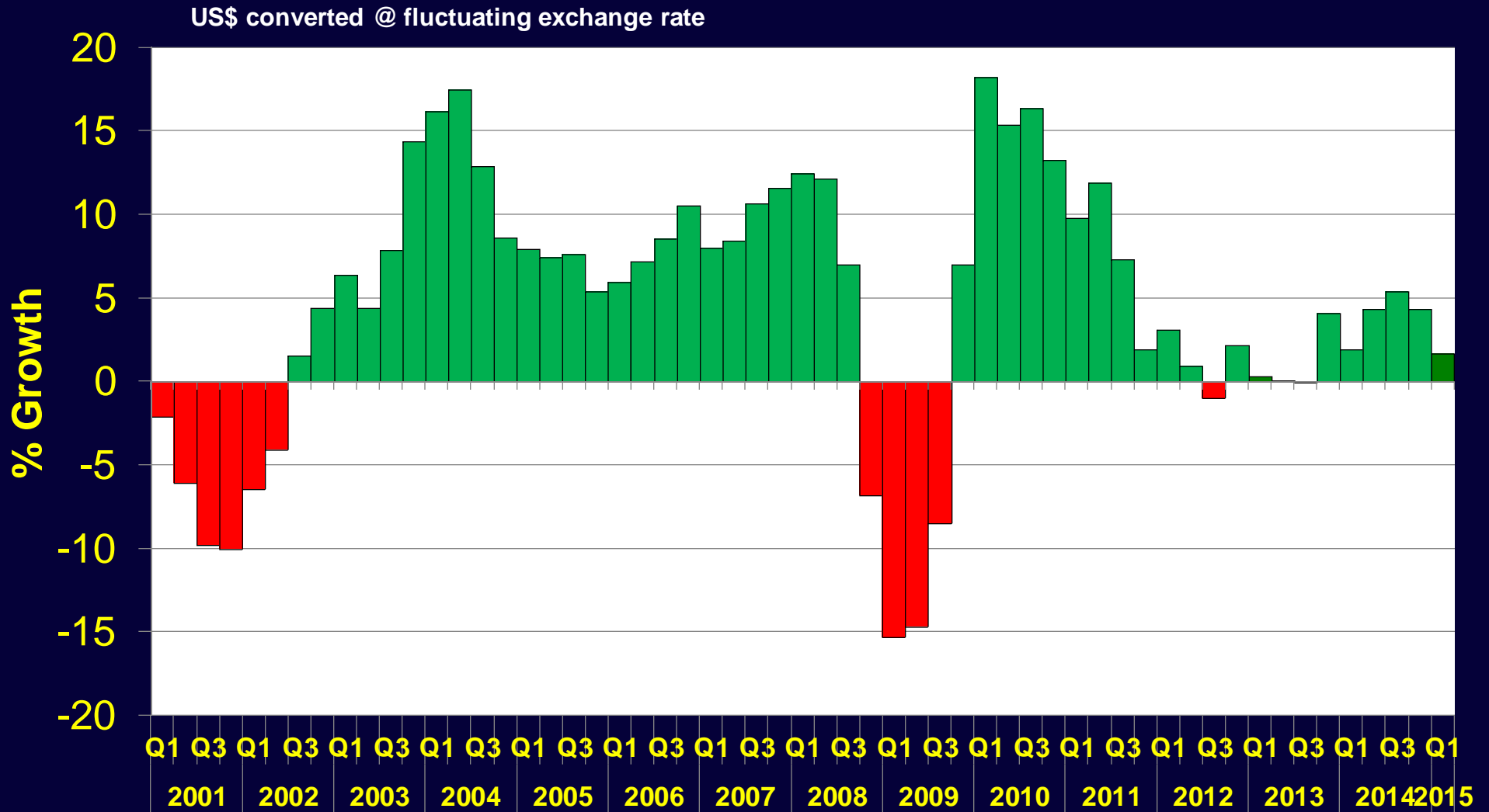
Composite of 161 Public Companies

Revenue, Net Income & Inventory



Computer 13, Internet 9, Storage 10, Communication 20, SEMI 30, Medical 23, Instruments 12, Military 6, Business & Office 3, Consumer 13, Automotive 11

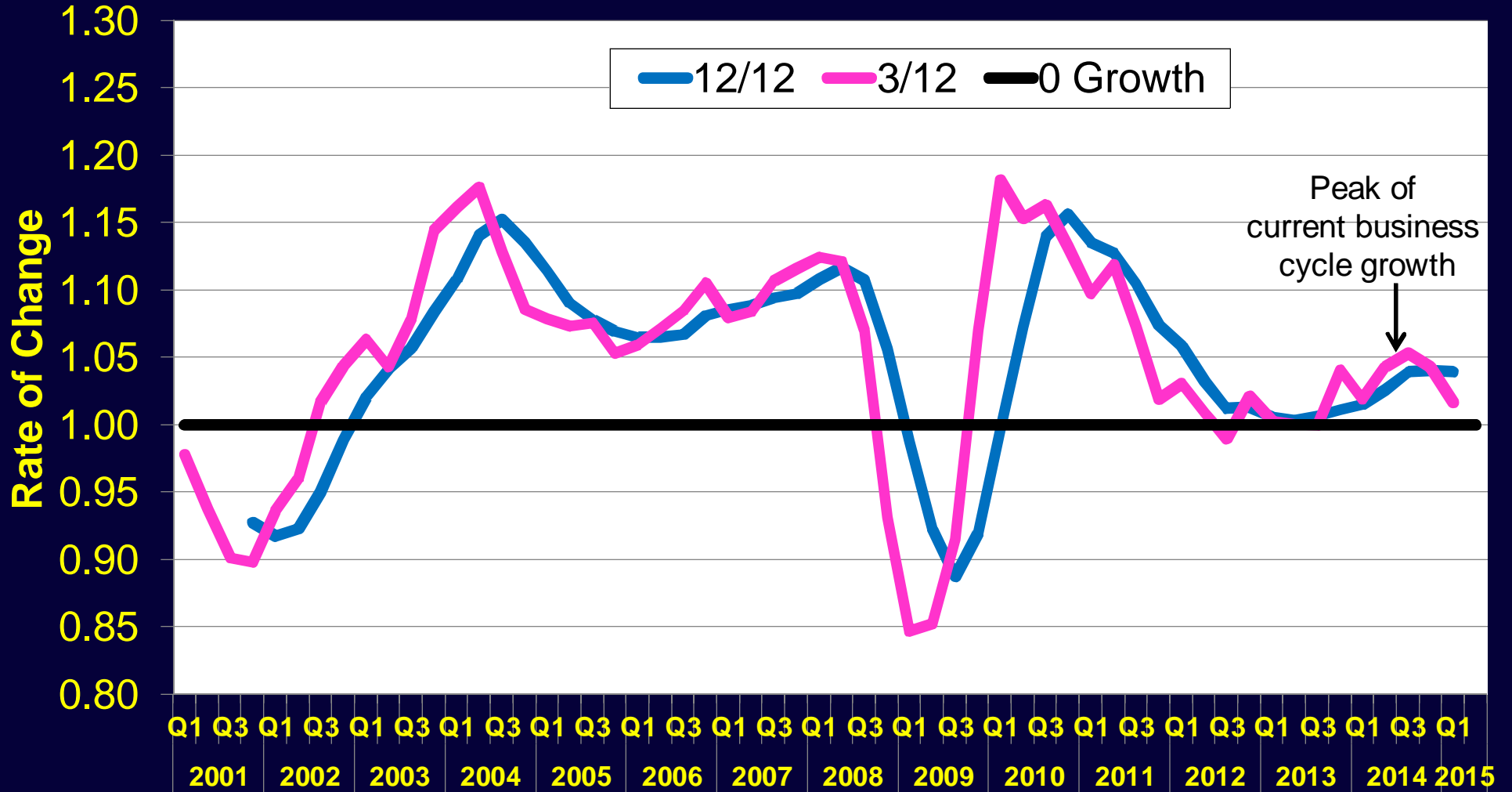
Electronic Equipment Suppliers Composite of 161 Public Companies Quarterly Revenue Growth



Computer 13, Internet 9, Storage 10, Communication 20, SEMI 20, Medical 23, Instruments 12, Military 6, Business & Office 3 + Media tablets from all vendors, Consumer 13, Automotive 11

Chart 9

Global Electronic Equipment Shipment Growth 12/12 & 3/12 Rate of Change



160 OEM company sales composite

World Electronic Equipment Production By Type

Annual Rate \$B

+1.7%

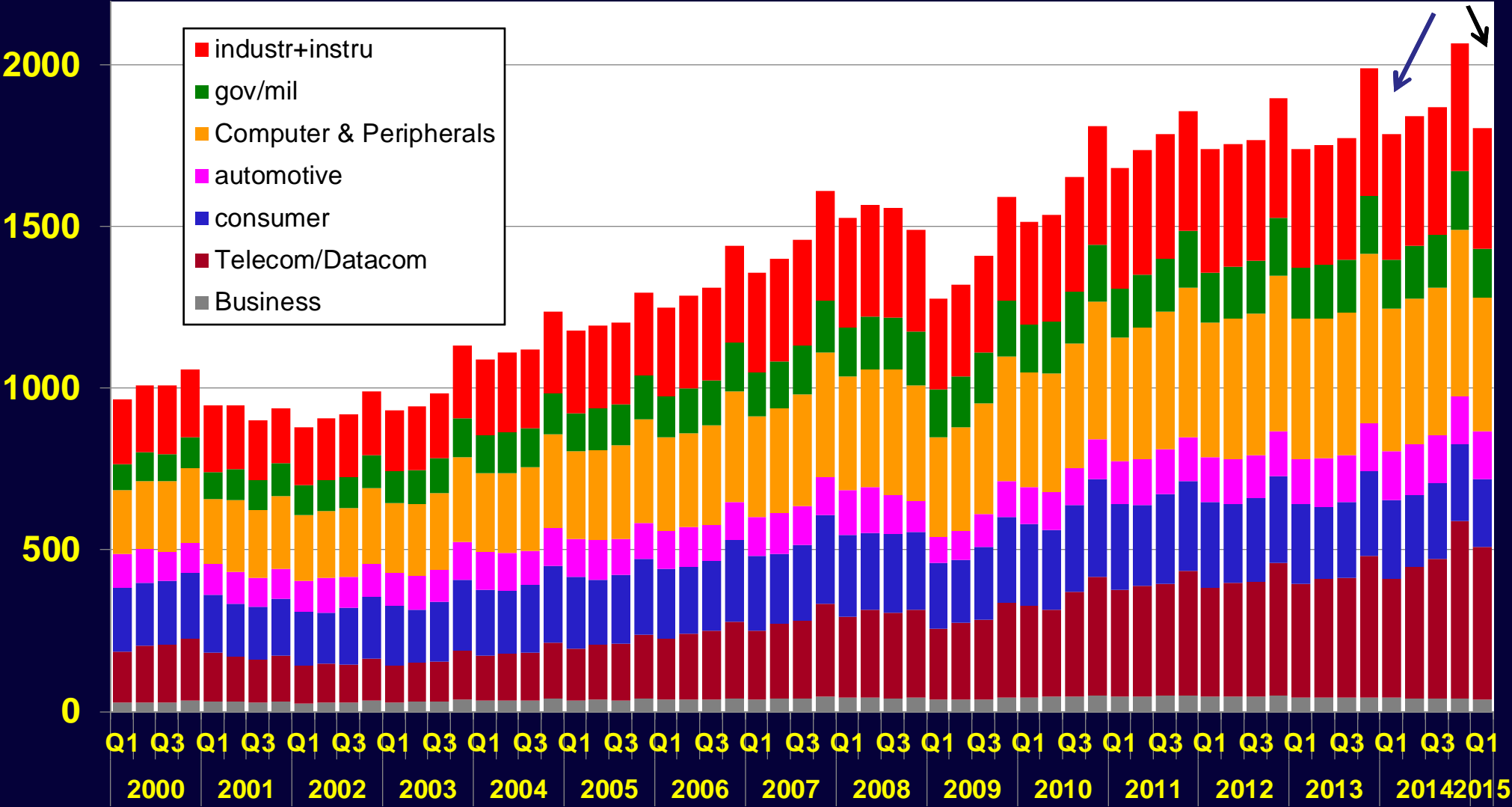
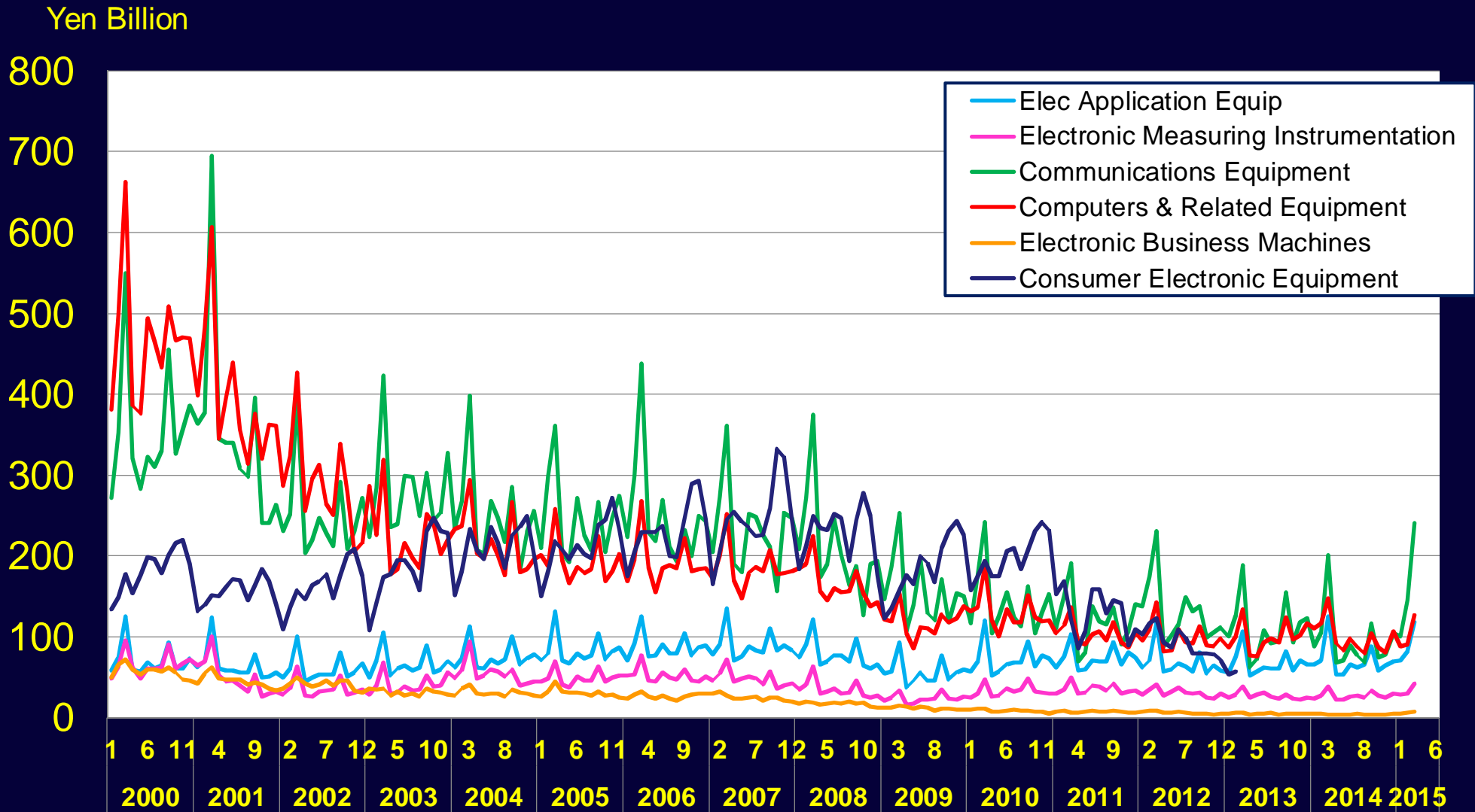


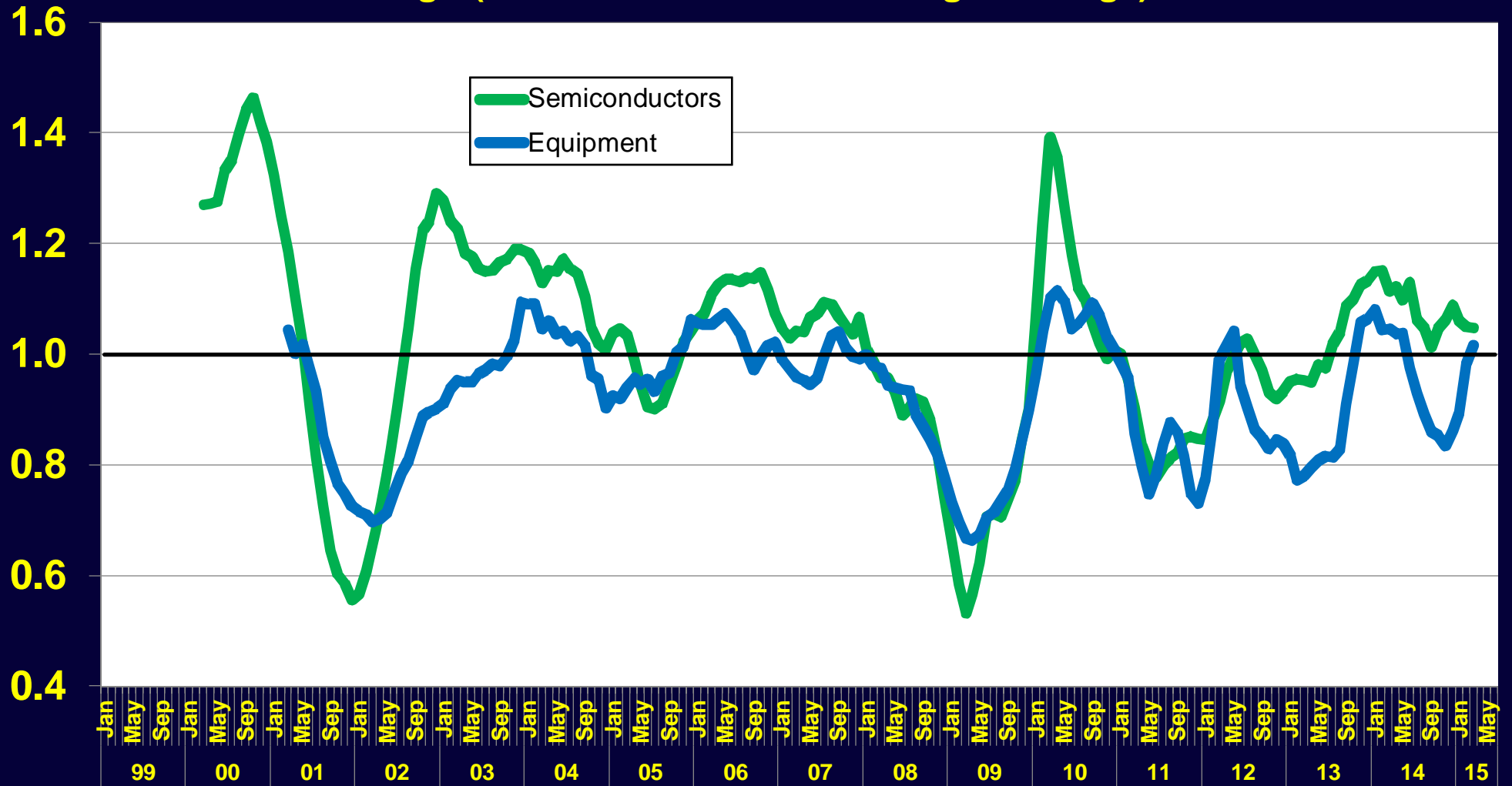
Chart 11

Japan Electronic Equipment Production by Month 2000 to Present



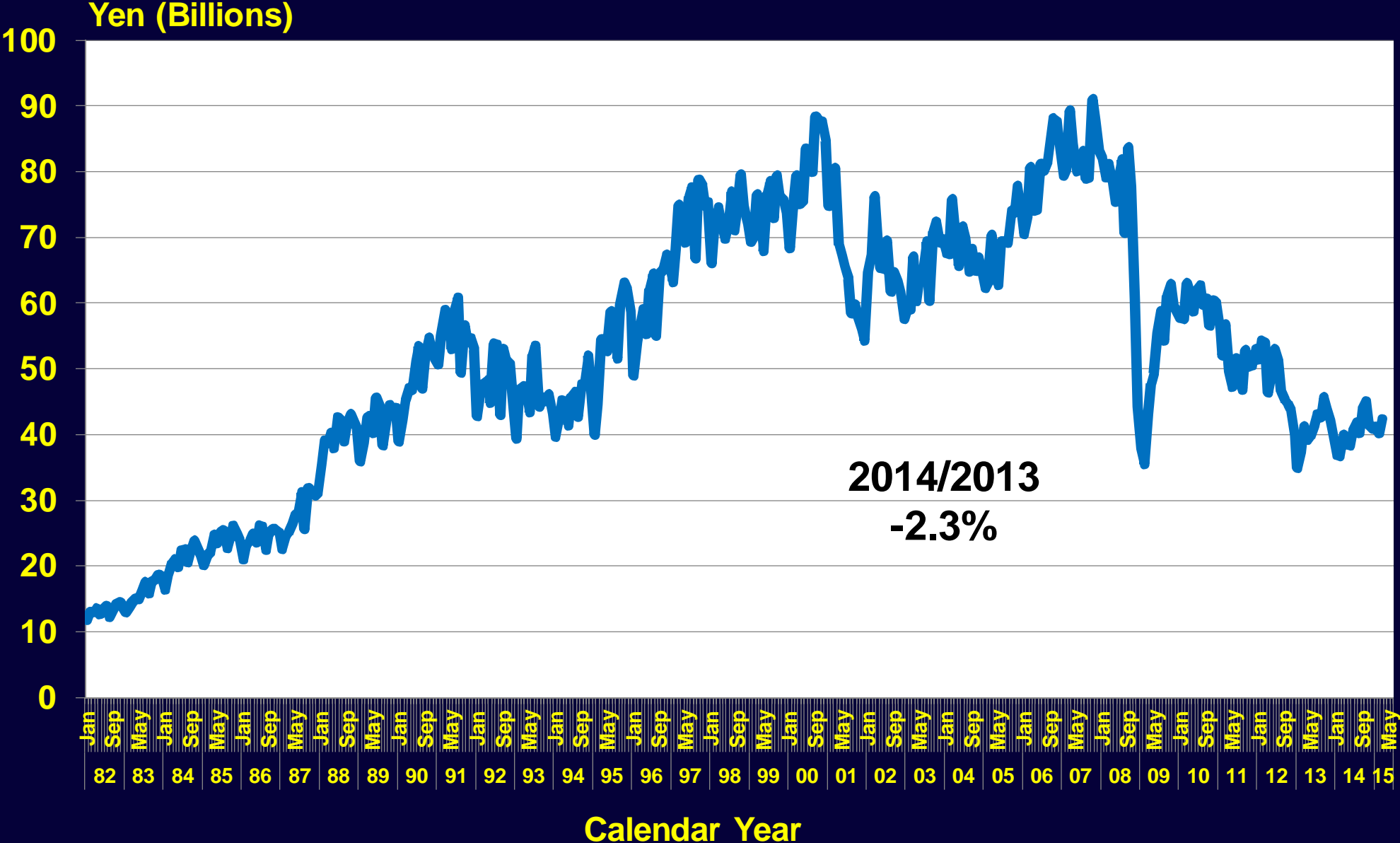
Semiconductor Shipments to Japan vs. Japanese Electronic Equipment Production

3/12 Rate of Change (Yen converted at fluctuating exchange)

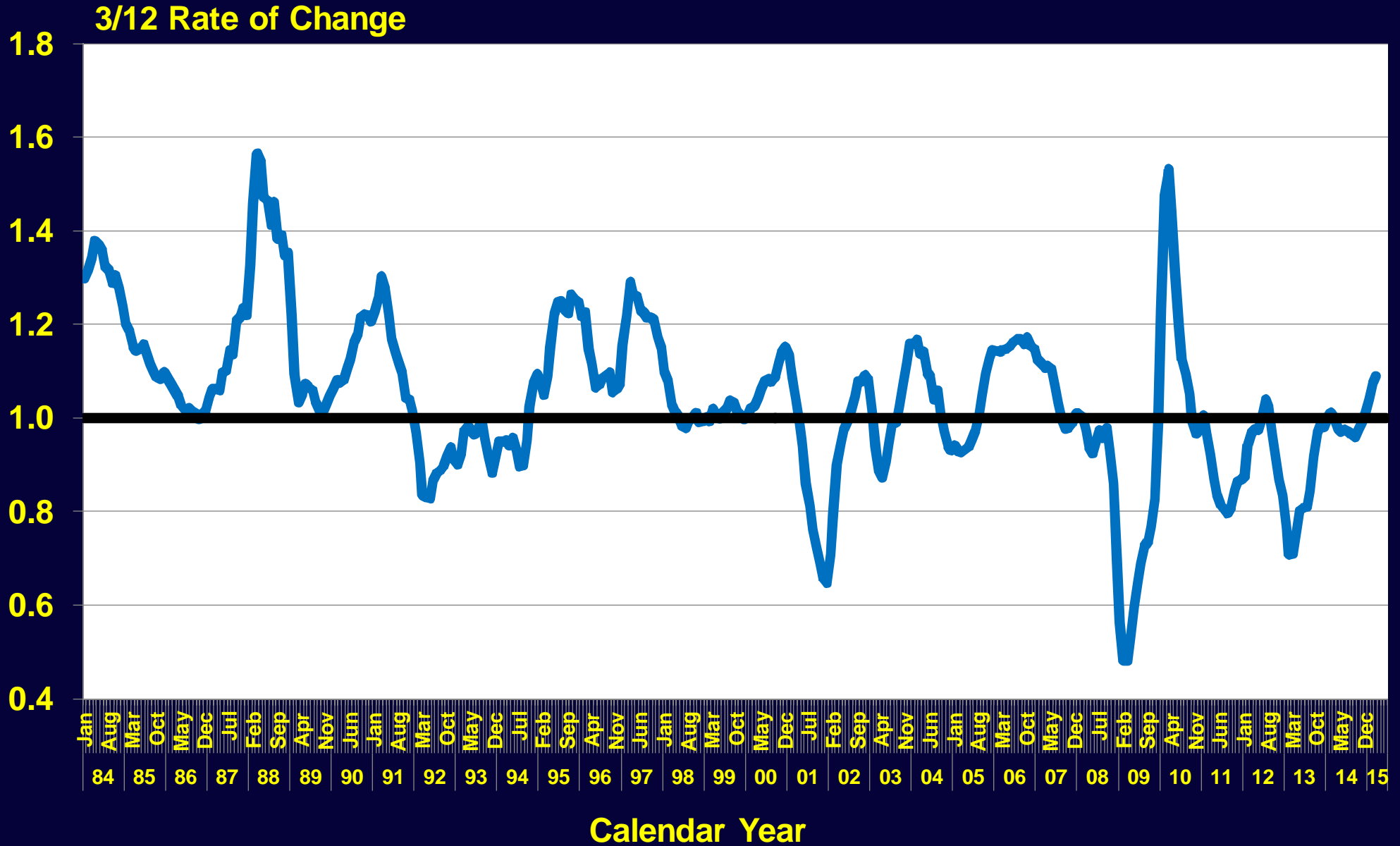


Total \$ Semiconductor Shipments from All Countries to Japan www.sia-online.org/,
JEITA www.jeita.or.jp/

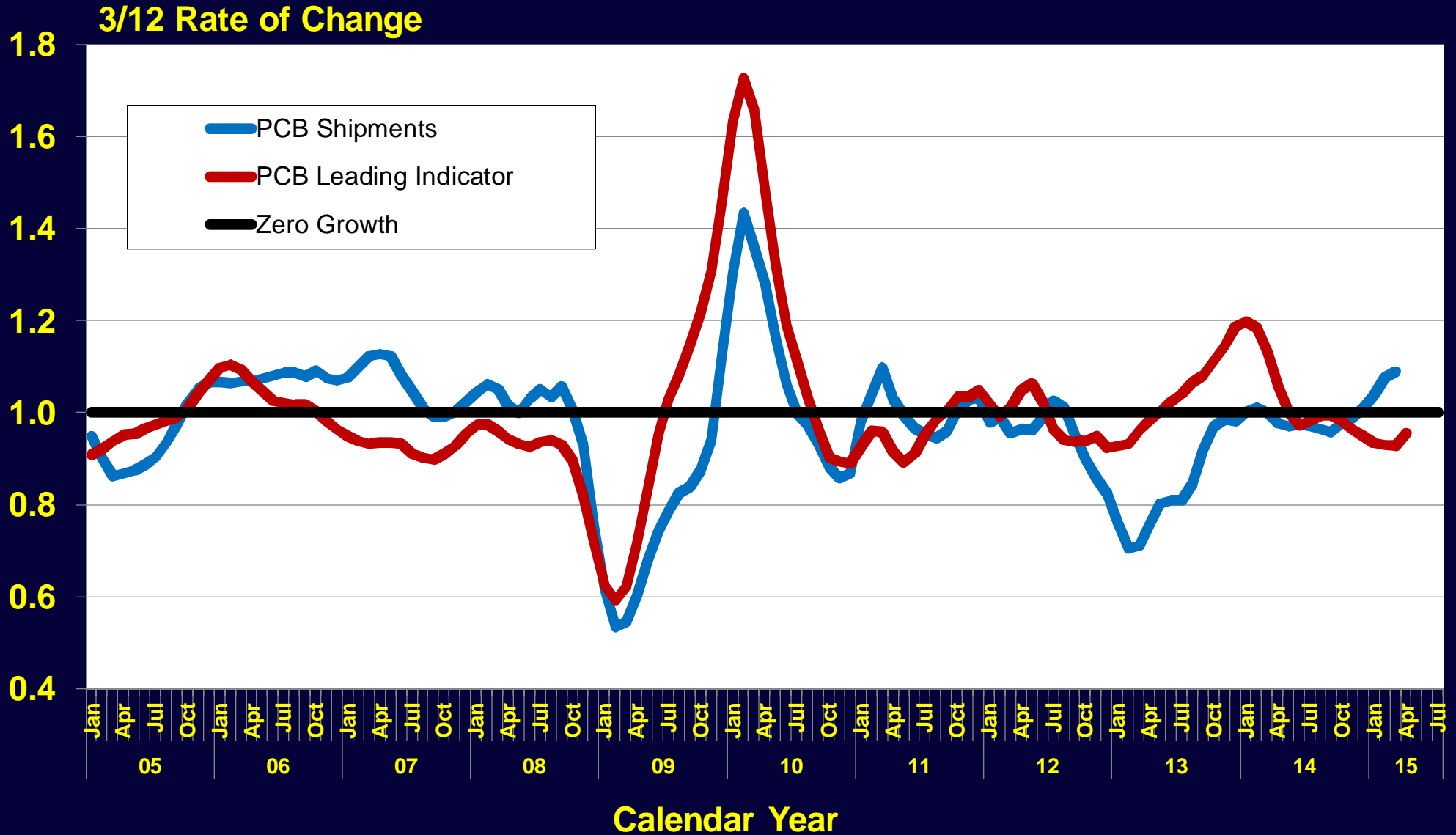
Japan PCB Shipments



Japan PCB Production

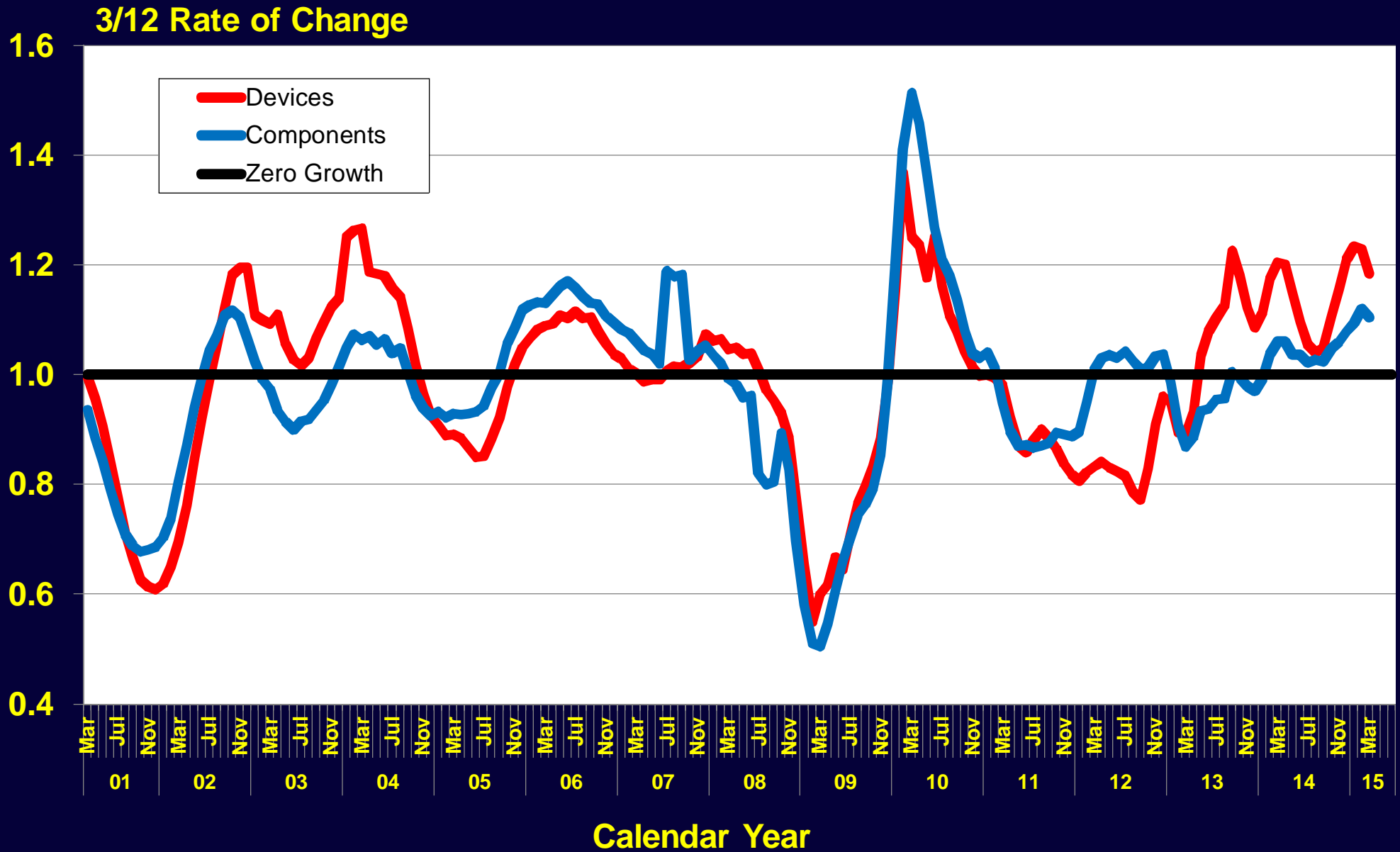


Japan PMI PCB Leading Indicator vs. Japan PCB Production

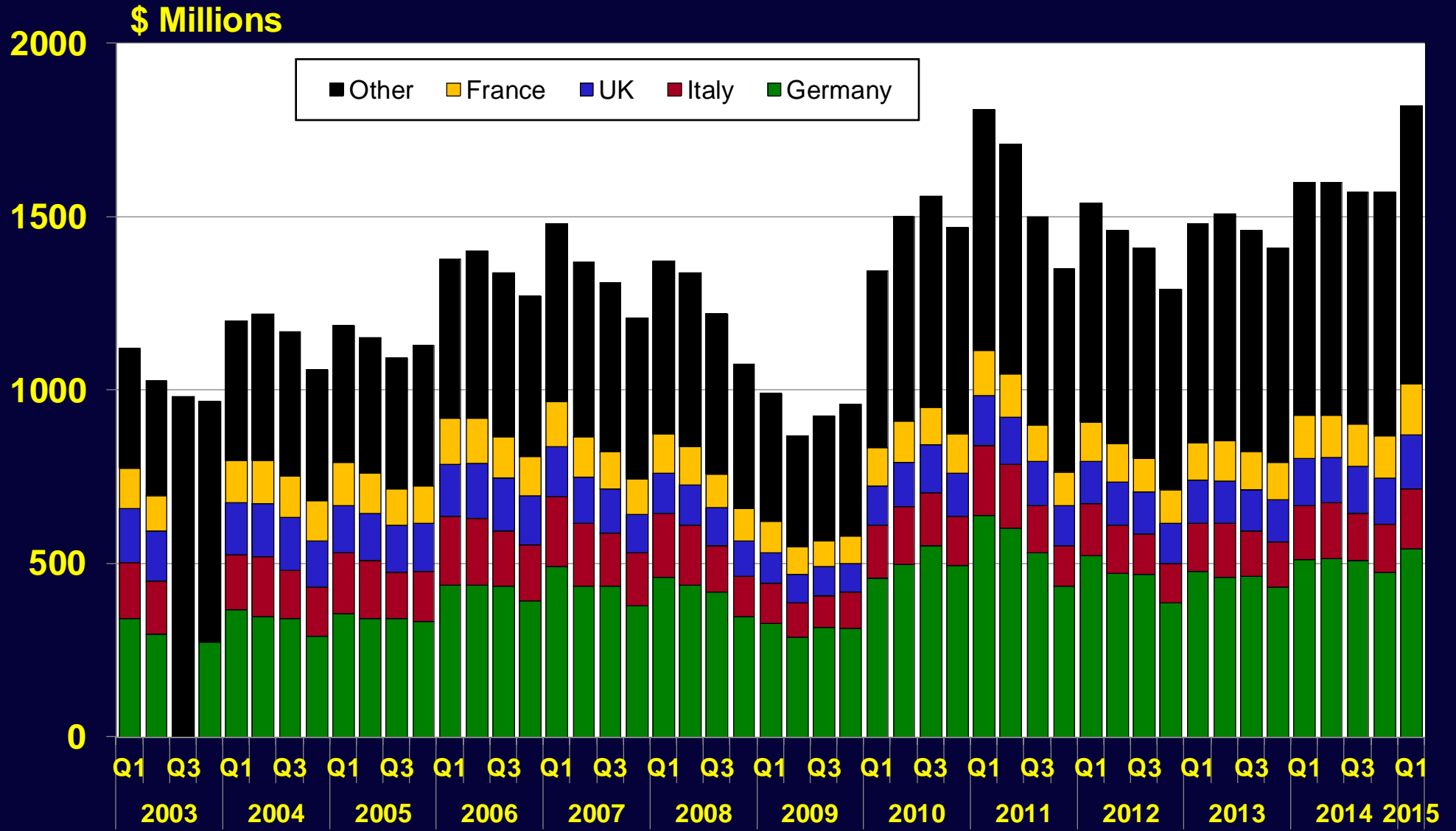


Source: Custer Consulting Group

Japanese Electronic Component & Device Production



DMASS - European Semiconductor Distribution Industry

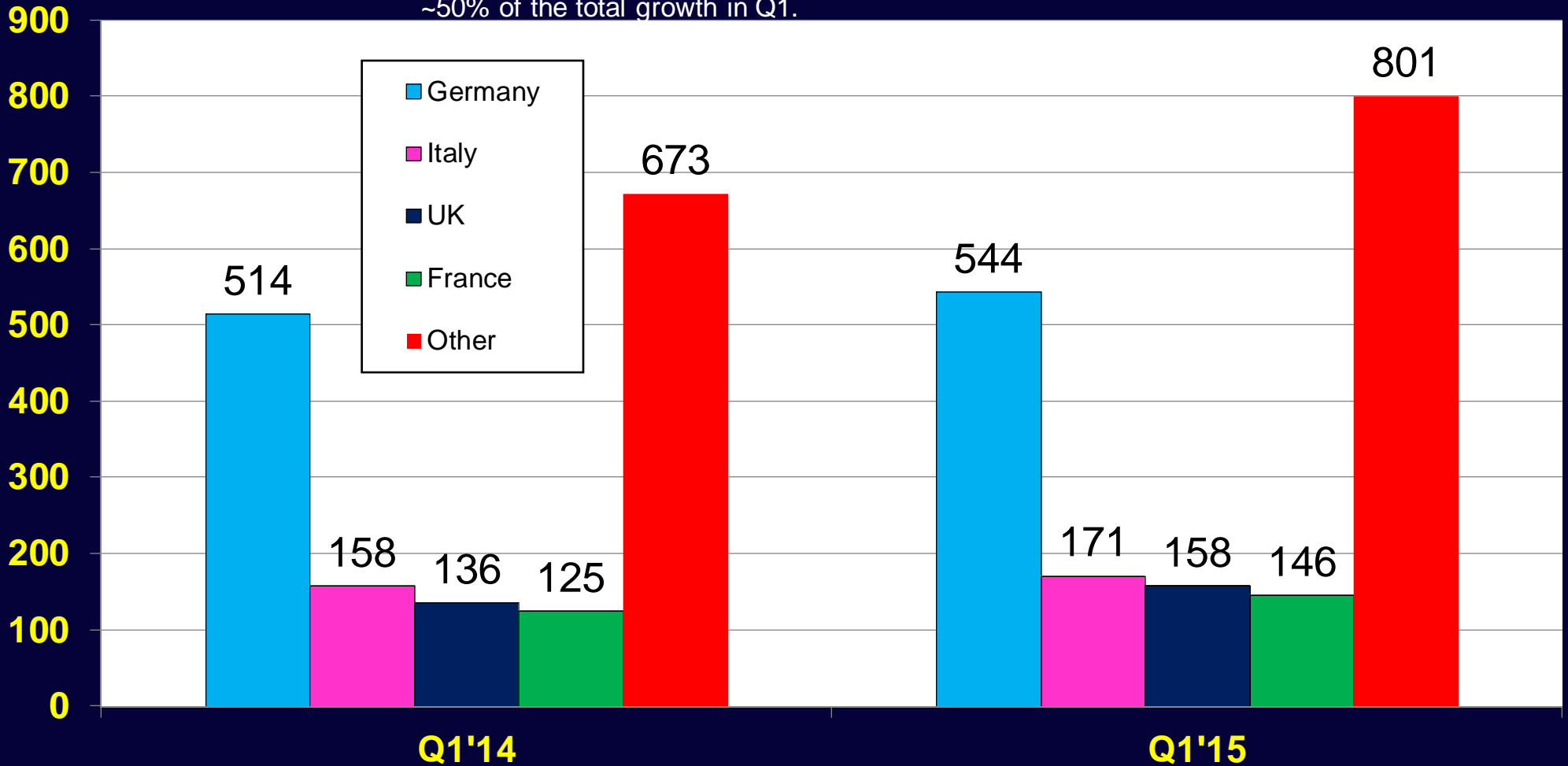


DMASS

European Semiconductor Distribution Industry

The majority of the Q1'15 increase is due to a massive swing in the Euro/US-Dollar exchange rate, with the Euro losing 17% of its value, compared to Q1/CY14. As a significant part of billings to European customers are done in US Dollars, there is an artificial growth effect of ~50% of the total growth in Q1.

Euros (Millions)

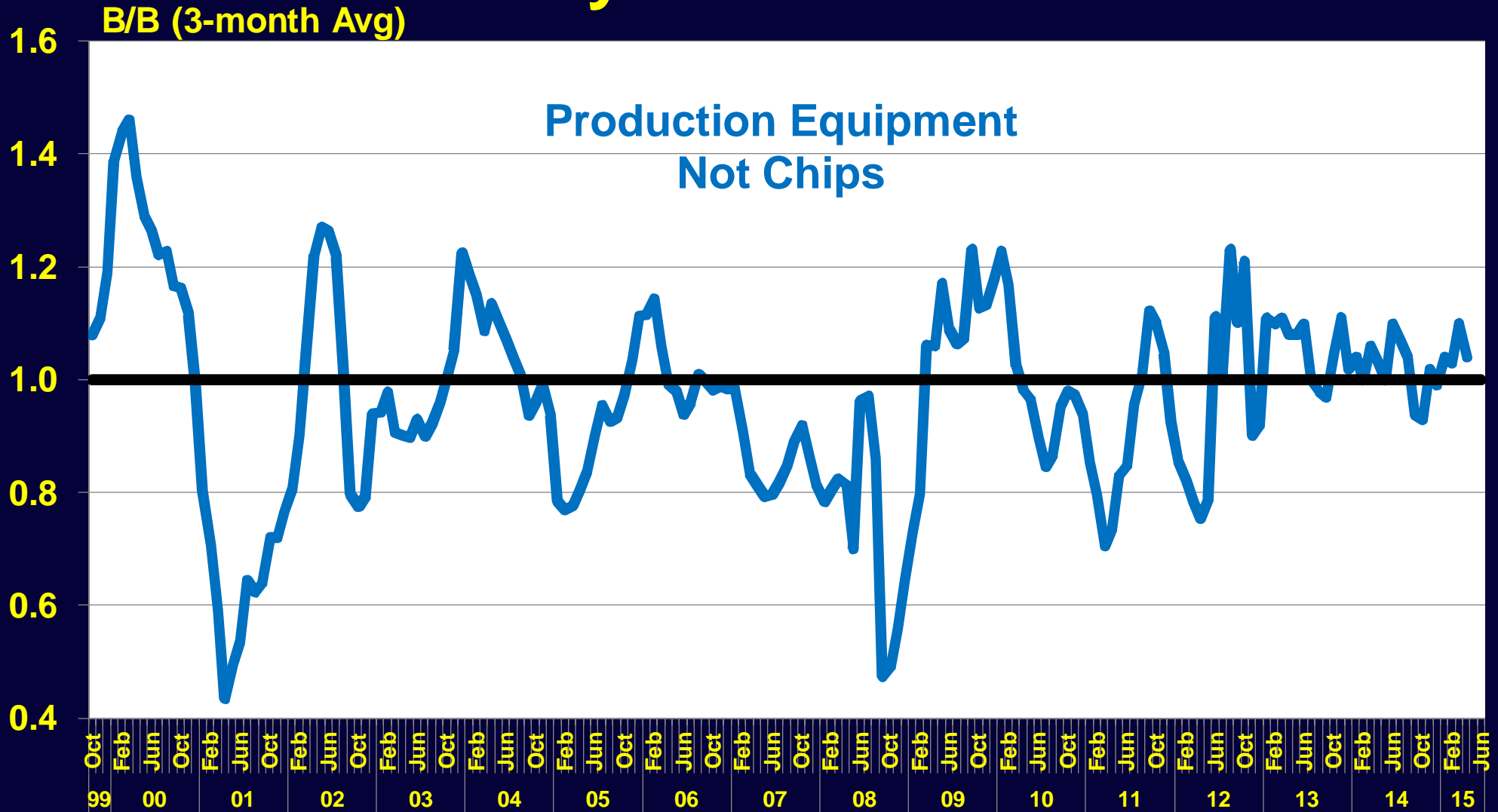


The growth leaders in Q1 were to be found in the Eastern Regions – Israel, Turkey, Eastern European countries – and the Nordic countries. While Israel and Turkey grew over 30%, Eastern Europe in total grew by 29% (exception Russia with minus 15%), Nordic by 23%. Of the major regions, UK (16.3%) and France (17.2%) grew above average, while Germany (5.8%) and Italy (8.4%) trailed the trend.

1'15 Semiconductor Sales Leaders (US\$ millions, including Foundries)

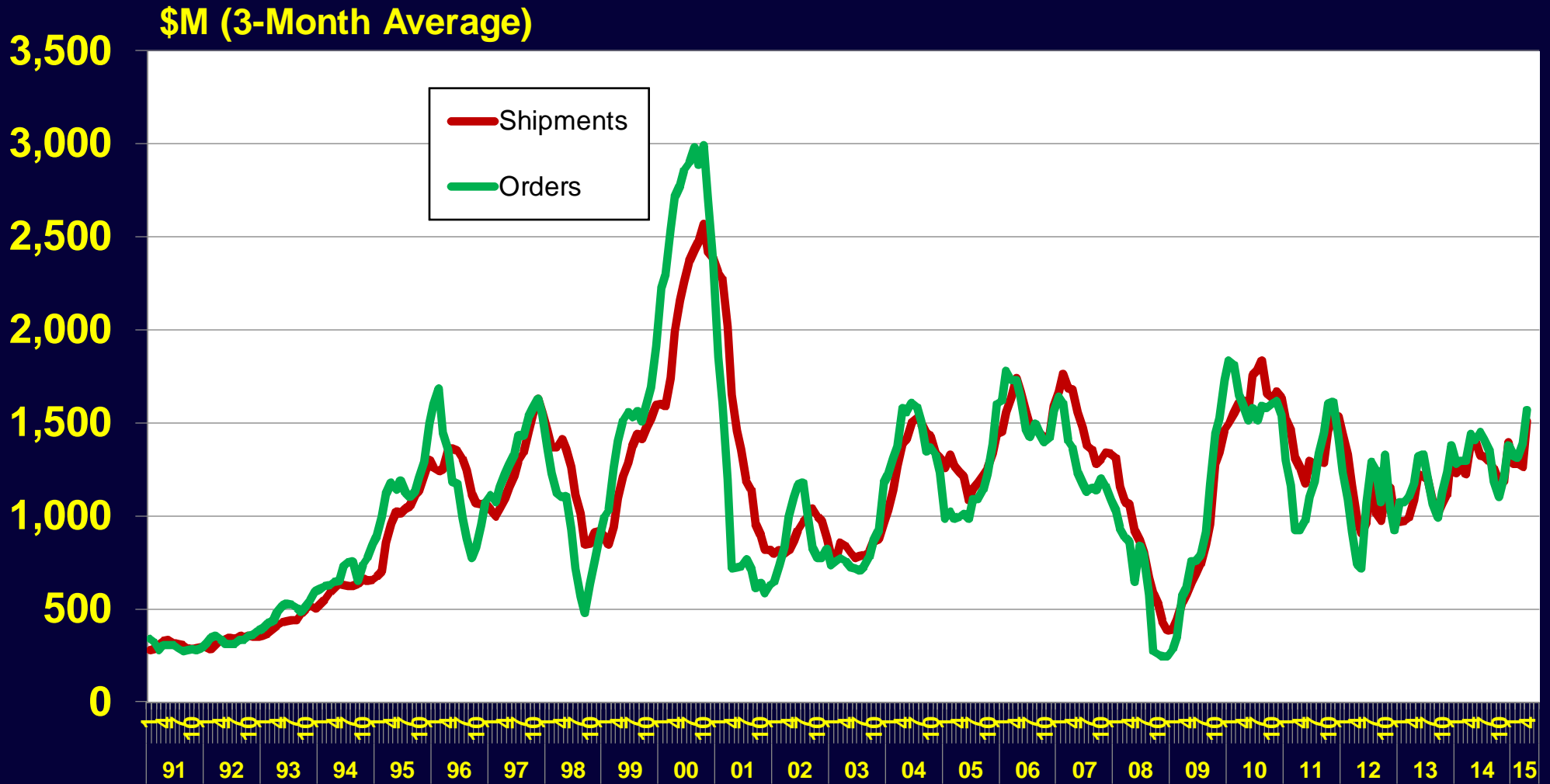
<u>Rank</u>	<u>Maker</u>	<u>1Q'15</u>	<u>1Q'15/1Q'14</u>
1	Intel	11,632	0%
2	Samsung Electronics	9,336	6%
3	TSMC	6,995	44%
4	Qualcomm	4,434	5%
5	SK Hynix	4,380	25%
6	Micron	4,070	1%
7	Texas Instruments	2,939	5%
8	Toshiba	2,750	-2%
9	Broadcom	2,058	4%
10	MediaTek	1,799	12%
11	STMicroelectronics	1,700	-7%
12	Infineon	1,672	16%
13	Avago	1,615	24%
14	Renesas	1,470	-21%
15	NXP	1,467	18%
16	Sony	1,272	26%
17	GlobalFoundries	1,190	21%
18	Freescale	1,169	7%
19	Sharp	1,137	62%
20	UMC	1,133	13%
	Total Top 20	64,218	9%

N American Semiconductor Equipment Industry Book/Bill Ratio



SOURCE Semiconductor Equipment and Materials International
<http://www.semi.org>

N American Semiconductor Equipment Industry Shipments & Orders



SOURCE Semiconductor Equipment and Materials International
<http://www.semi.org>

Global Silicon Wafer vs. Semiconductor Shipments (excluding solar applications for wafers)

