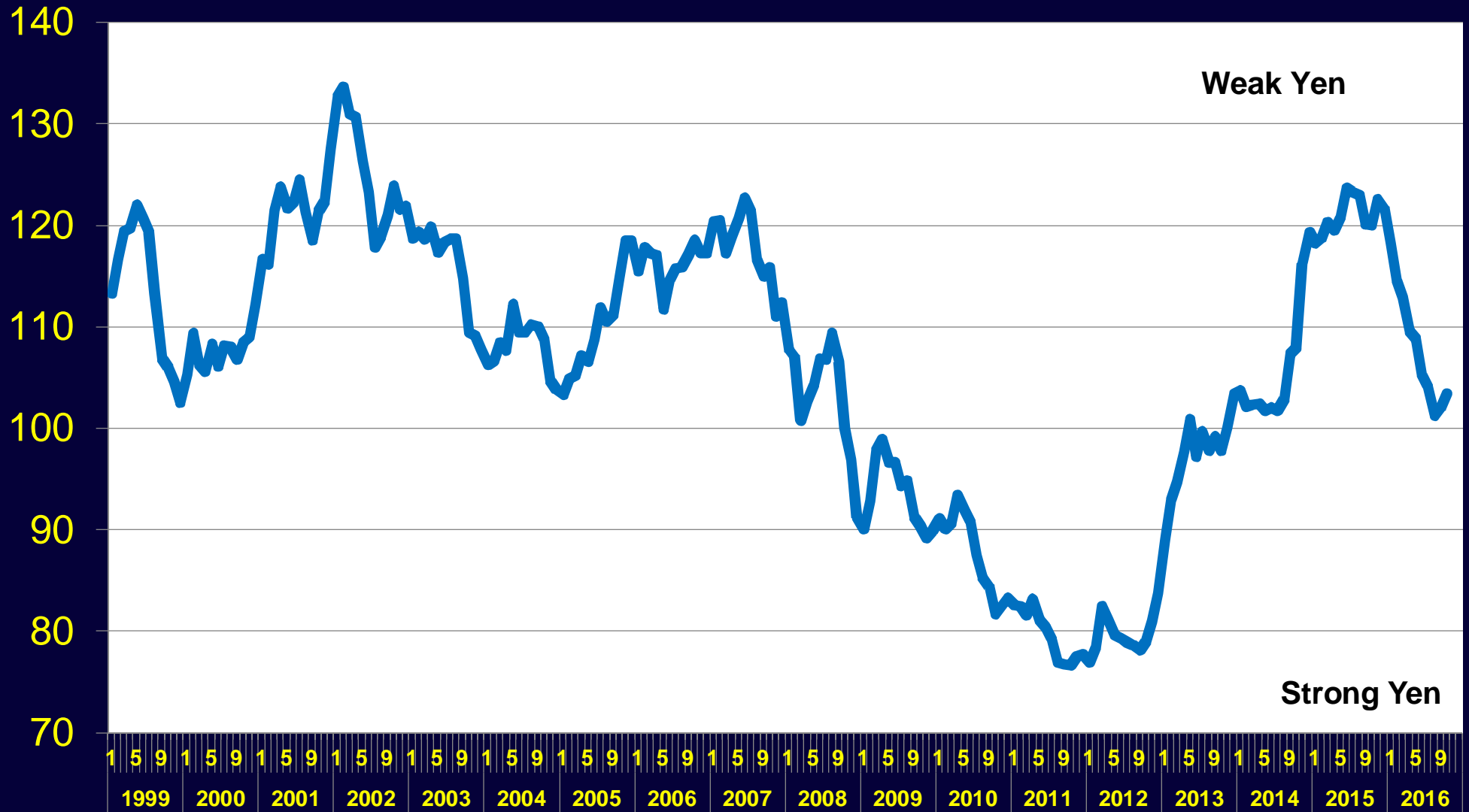


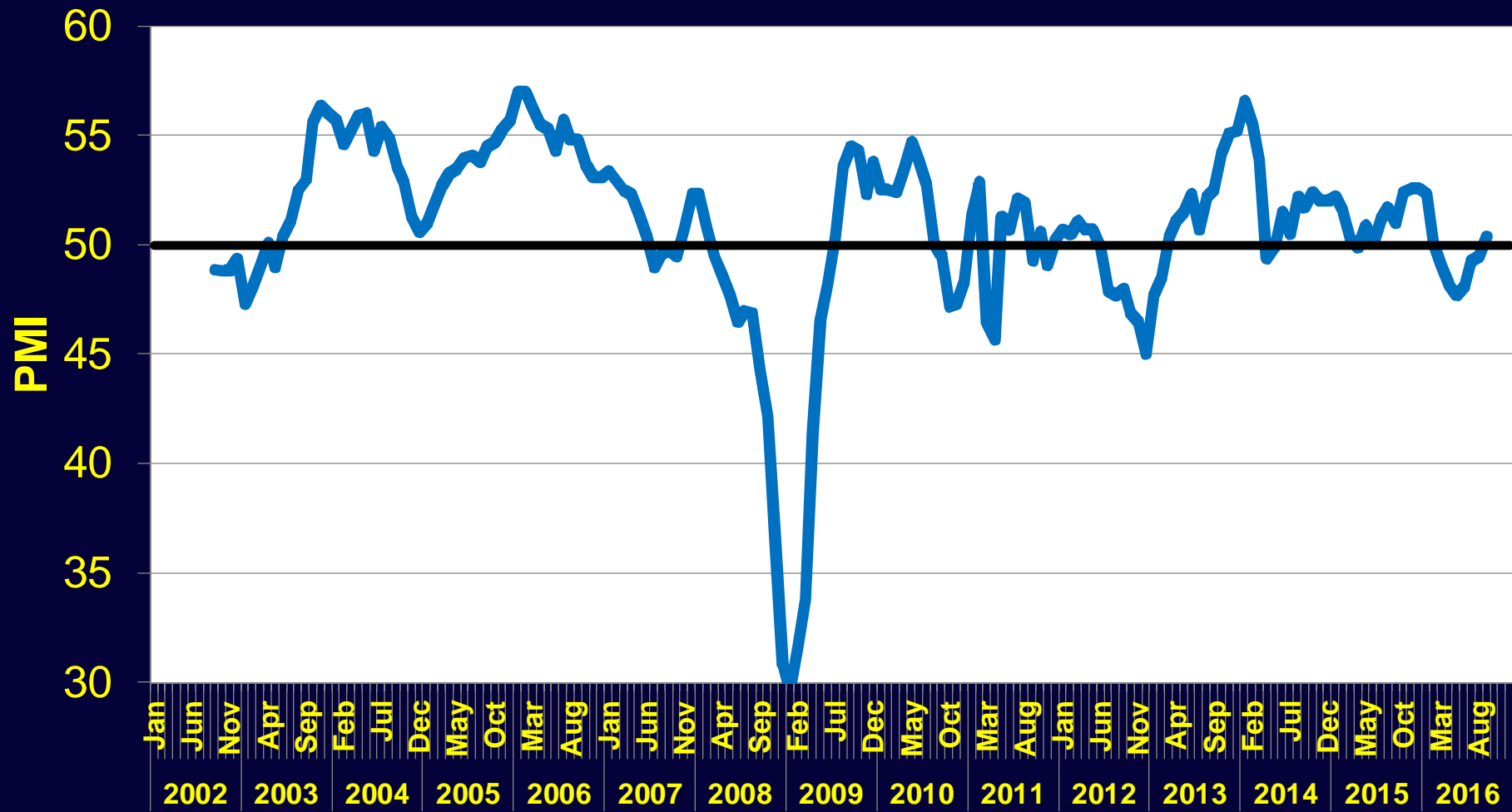
Chart 1

# Japanese Yen vs. U.S. Dollar



# Japan "Purchasing Managers" Index

Diffusion Index, >50 = Growth



# Japan Electronic Equipment Production by Month 2000 to Present

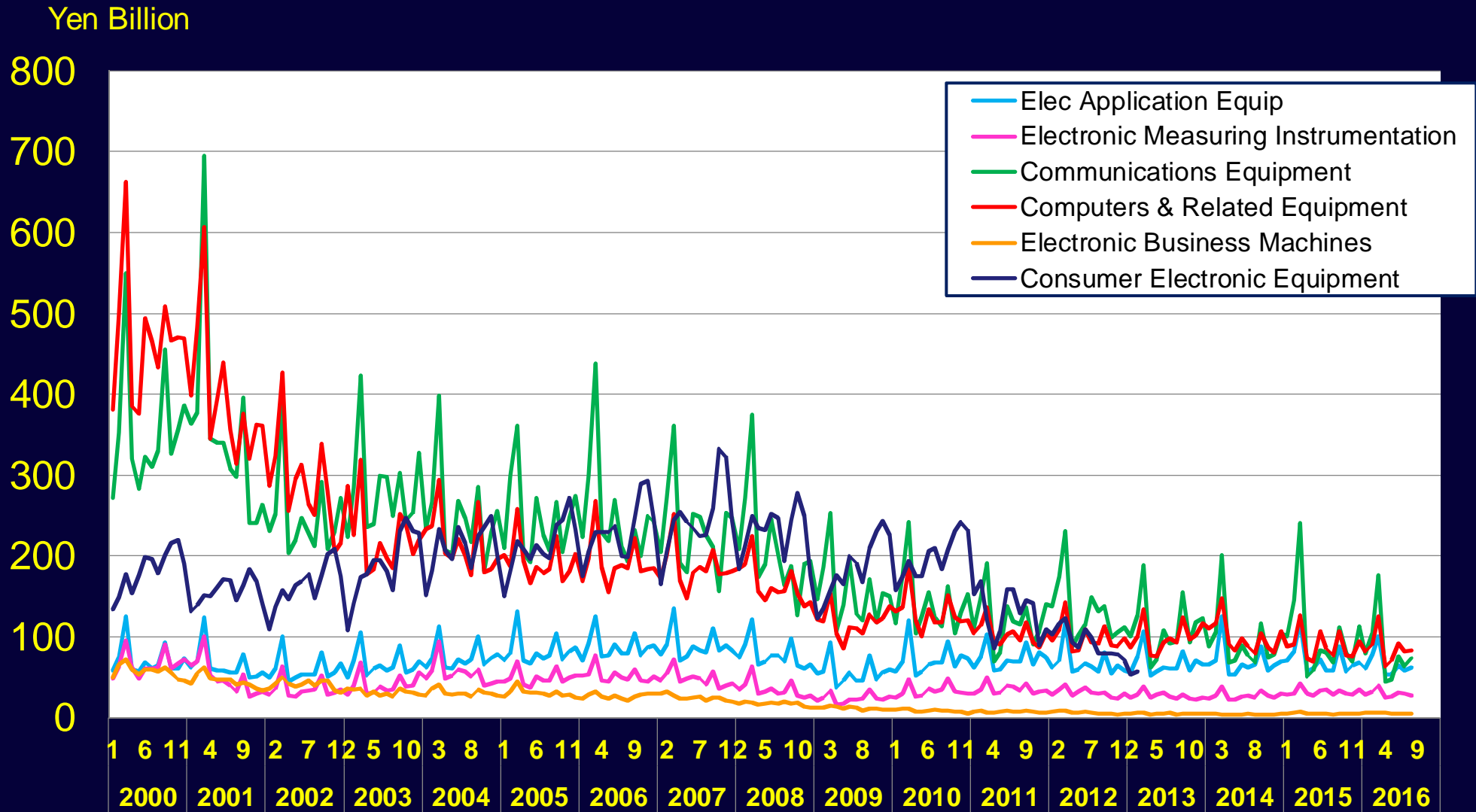
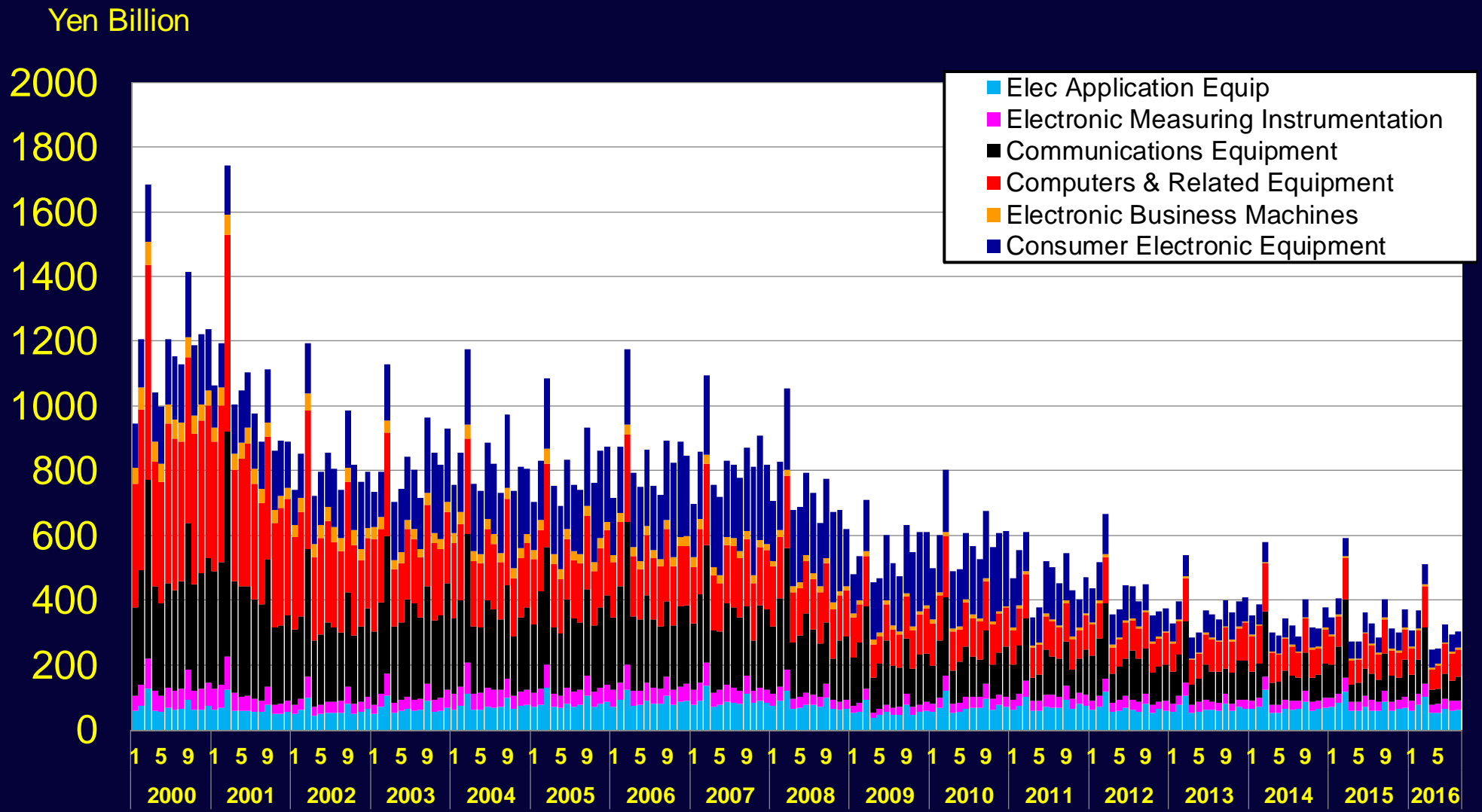


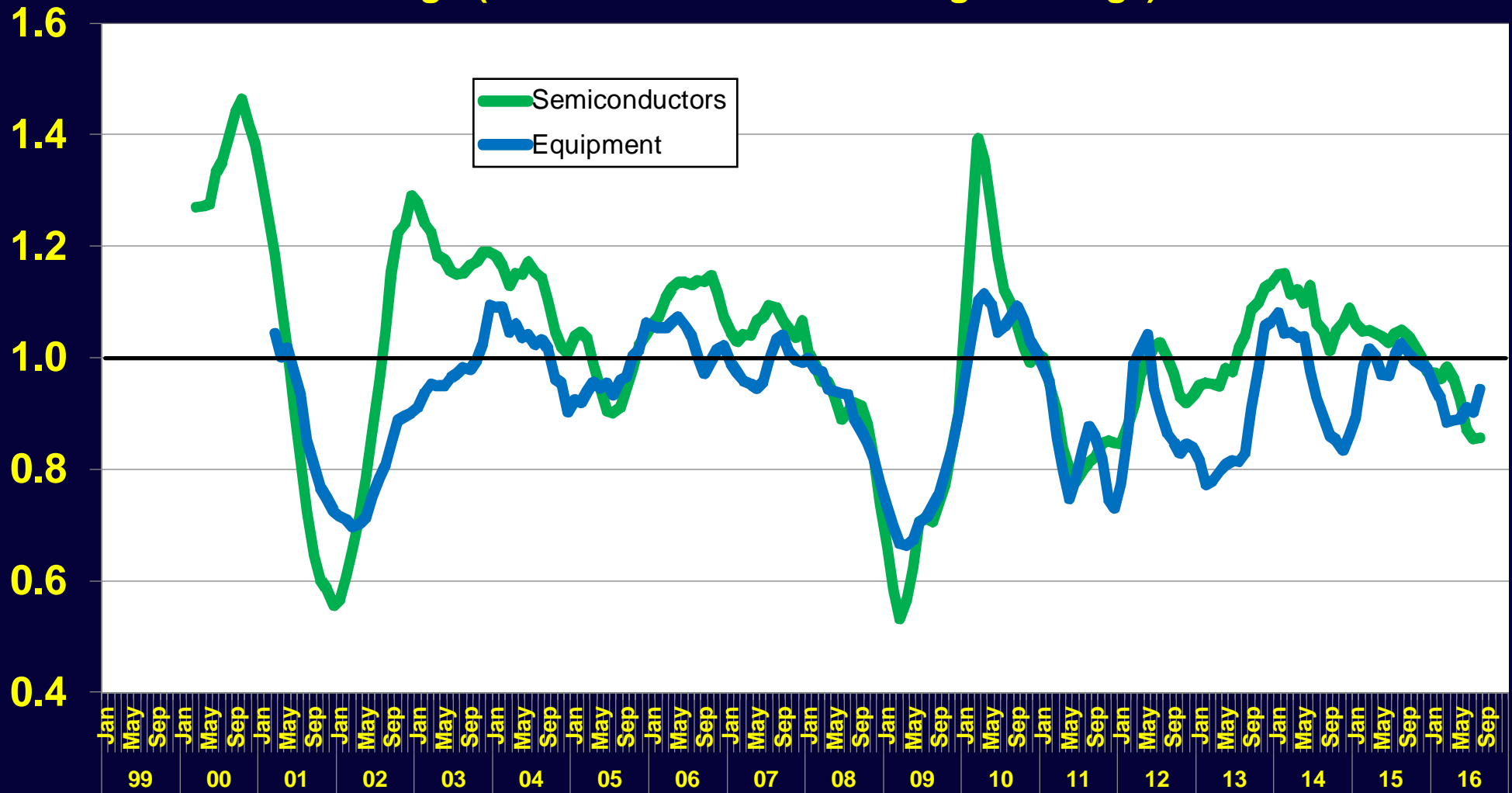
Chart 4

# Japan Electronic Equipment Production by Month 2000 to Present



# Semiconductor Shipments to Japan vs. Japanese Electronic Equipment Production

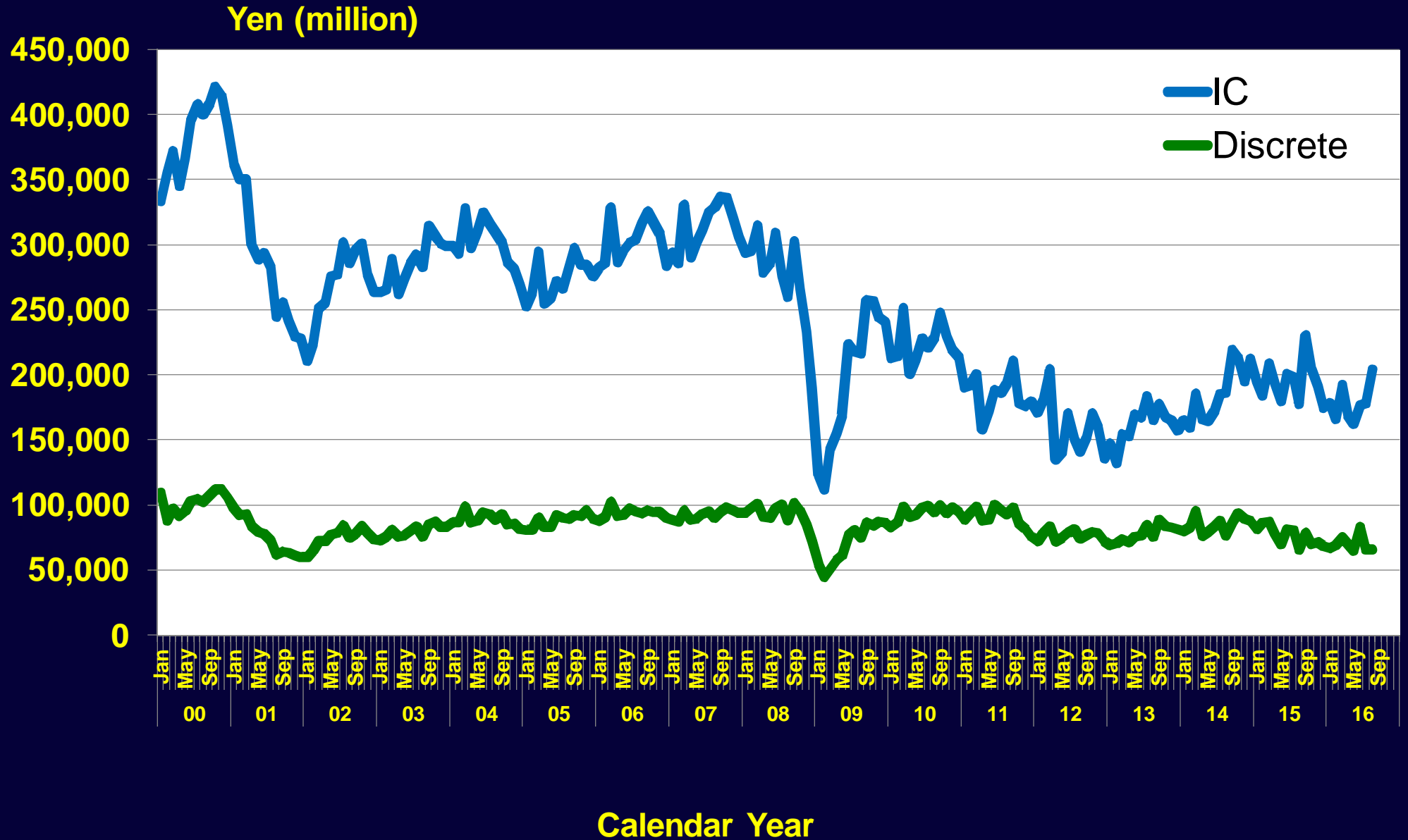
3/12 Rate of Change (Yen converted at fluctuating exchange)



Total \$ Semiconductor Shipments from All Countries to Japan [www.sia-online.org/](http://www.sia-online.org/),  
 JEITA [www.jeita.or.jp/](http://www.jeita.or.jp/)

Chart 6

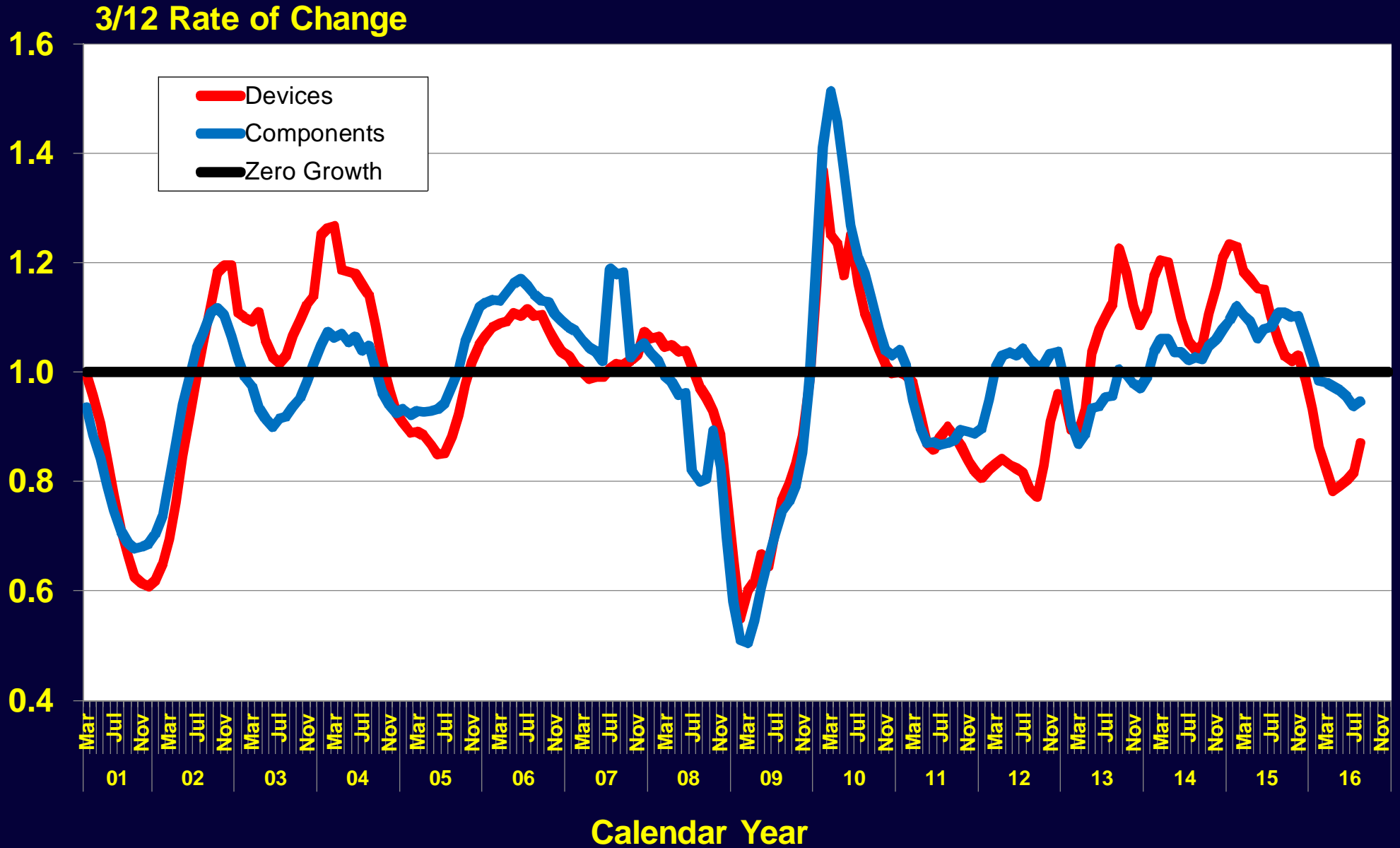
# Japan Integrated Circuit & Discrete Semiconductor Domestic Production



# Japan Passive Component Domestic Production

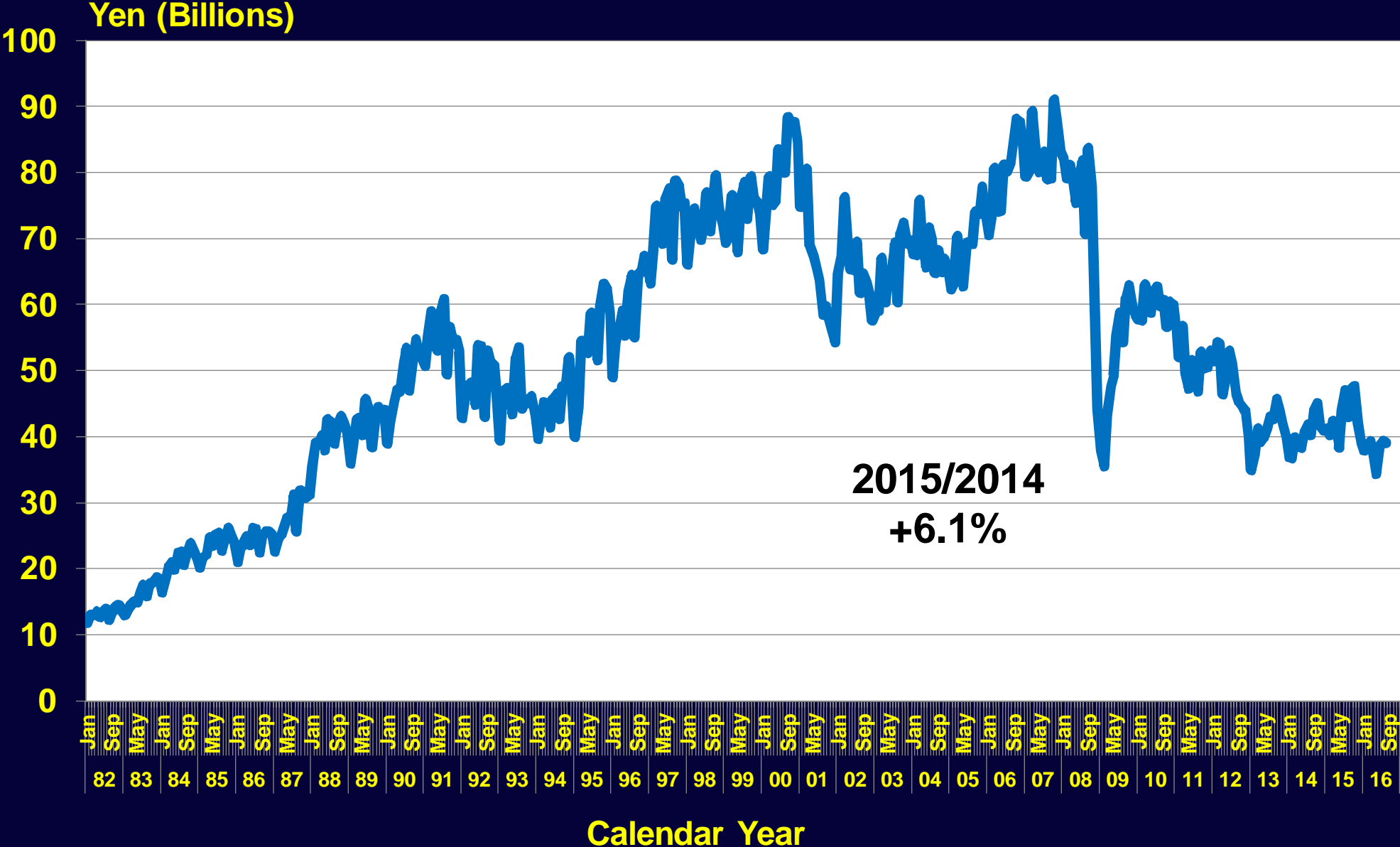


# Japanese Electronic Component & Device Production

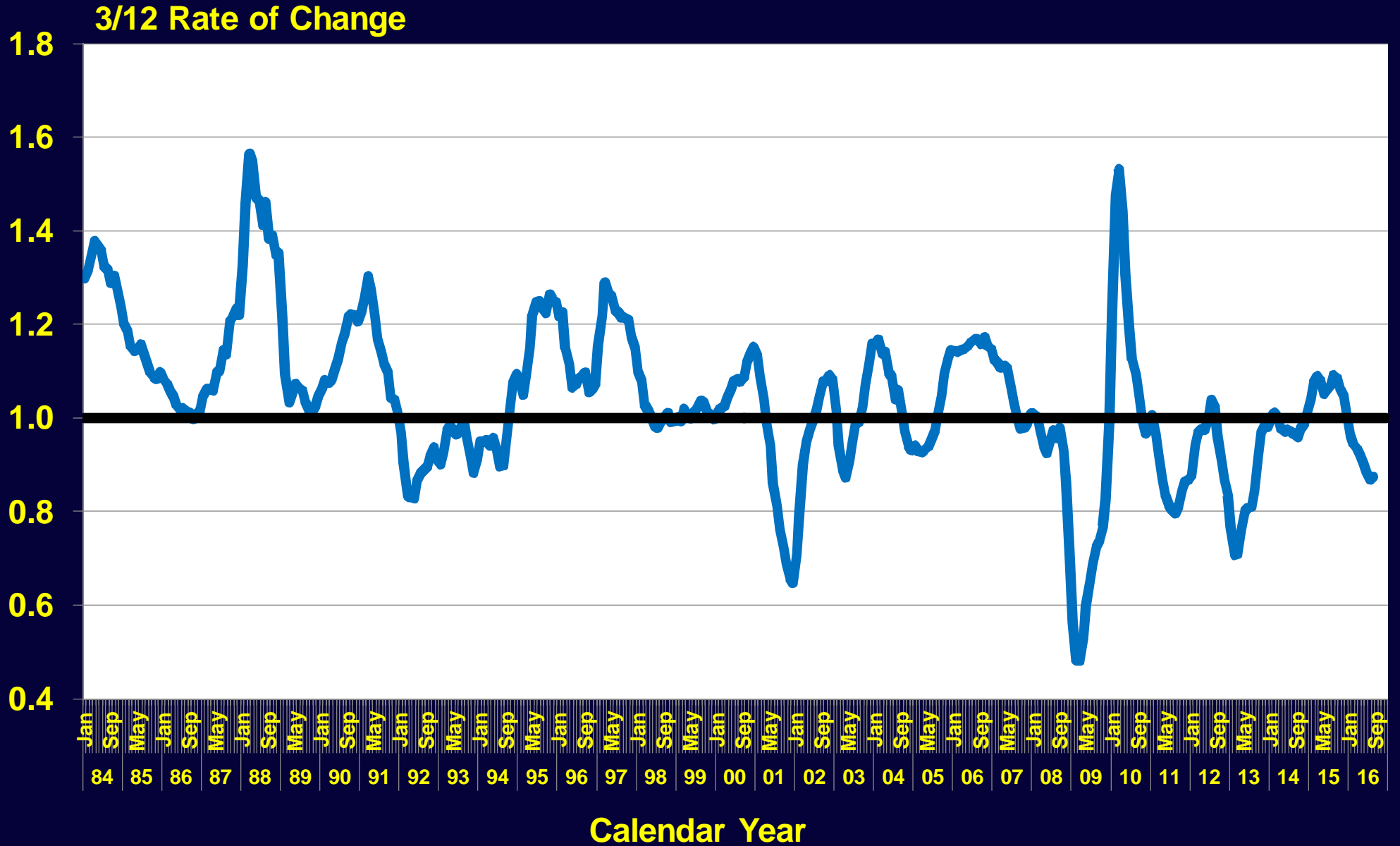




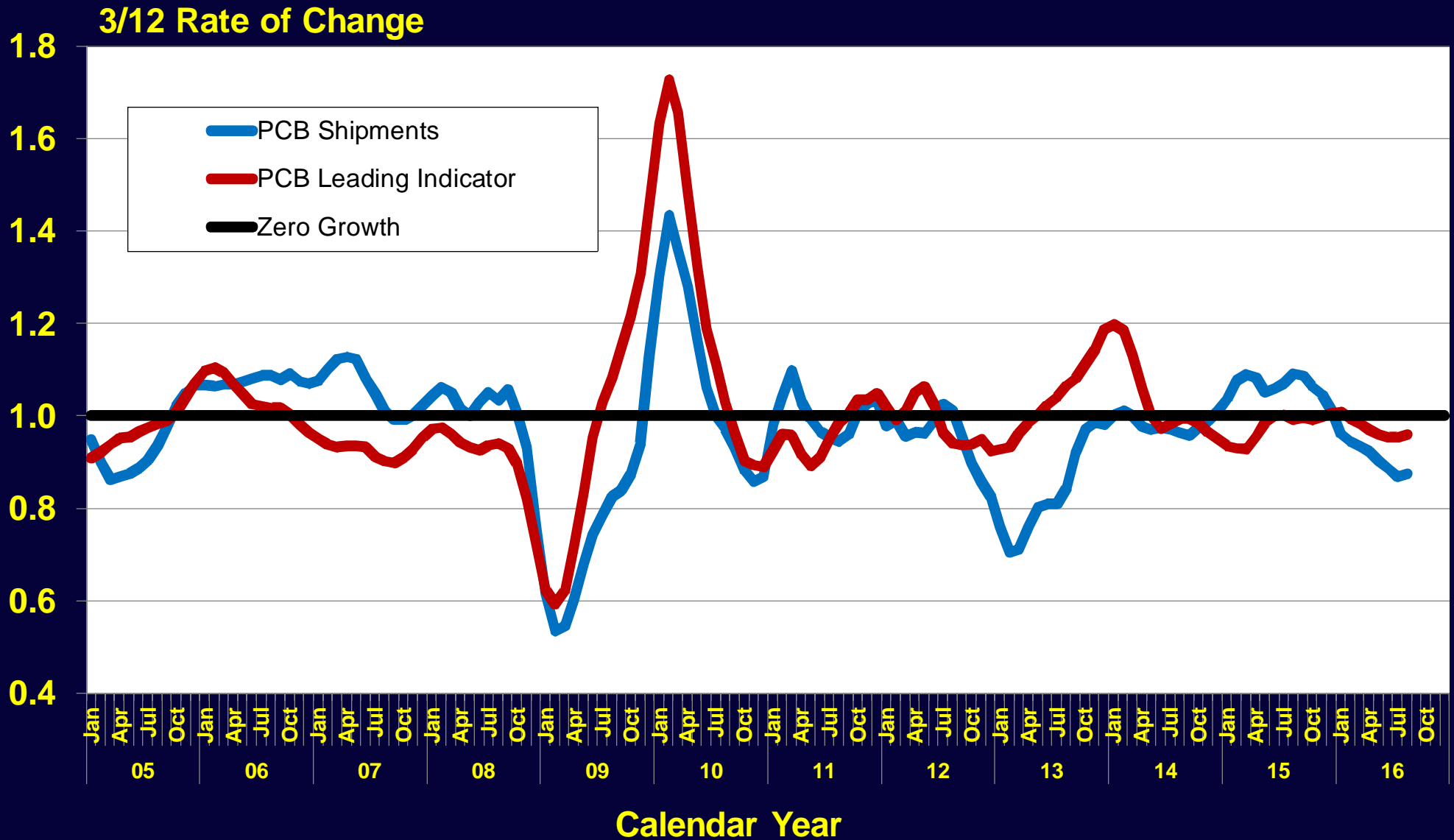
# Japan PCB Production



# Japan PCB Production



# Japan PMI PCB Leading Indicator vs. Japan PCB Shipments



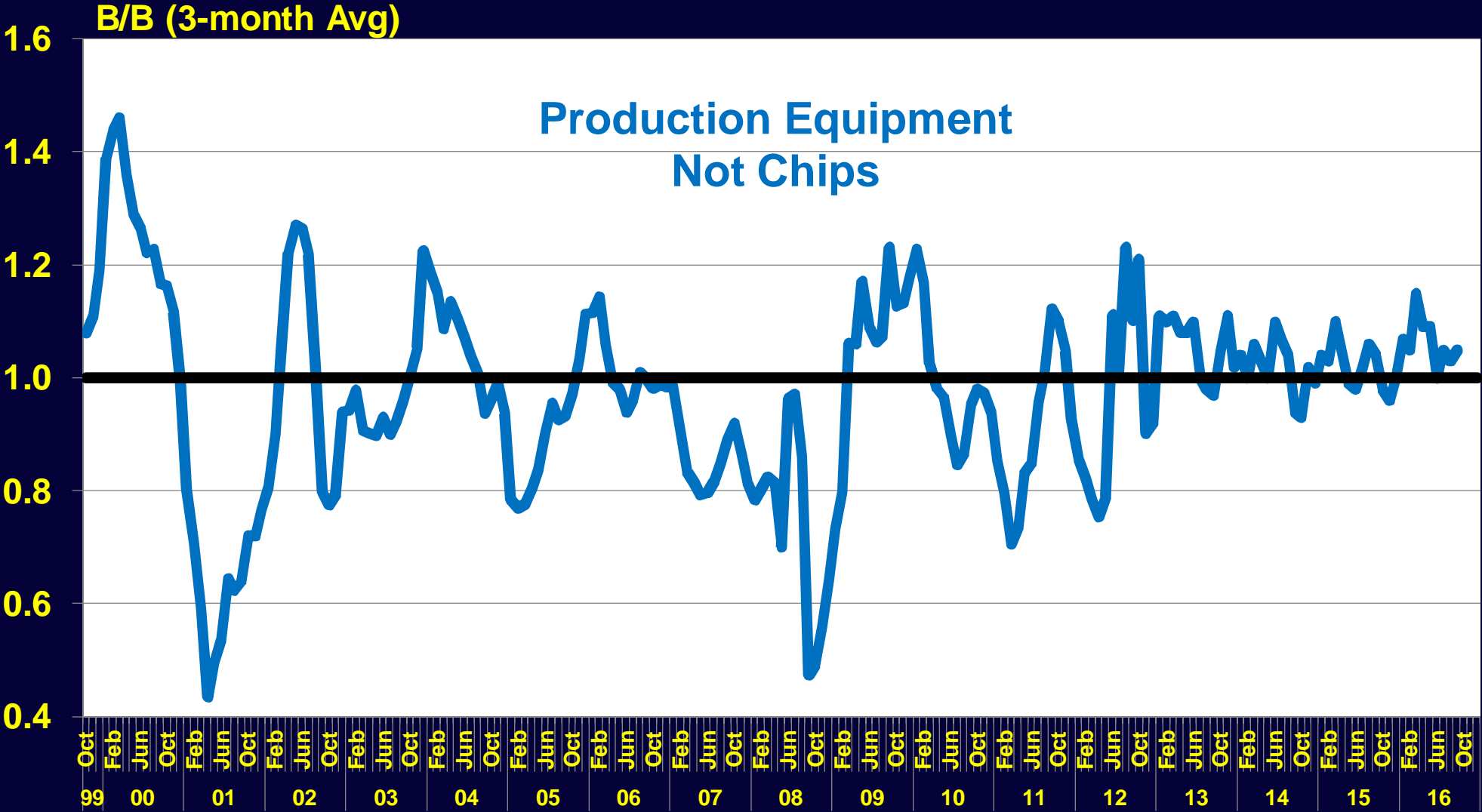
Source: Custer Consulting Group

# 26-Year History of 2H/1H IC Market Growth

Year	2H/1H % Change
1990	11.1%
1991	1.9%
1992	14.6%
1993	17.2%
1994	19.9%
1995	15.7%
1996	-6.3%
1997	3.5%
1998	7.5%
1999	22.4%
2000	13.9%
2001	-20.7%
2002	12.2%
2003	23.2%
2004	8.4%
2005	9.2%
2006	9.8%
2007	12.4%
2008	-6.0%
2009	33.0%
2010	6.6%
2011	-1.9%
2012	3.6%
2013	8.3%
2014	10.2%
2015	-1.2%
2016F	12.3%

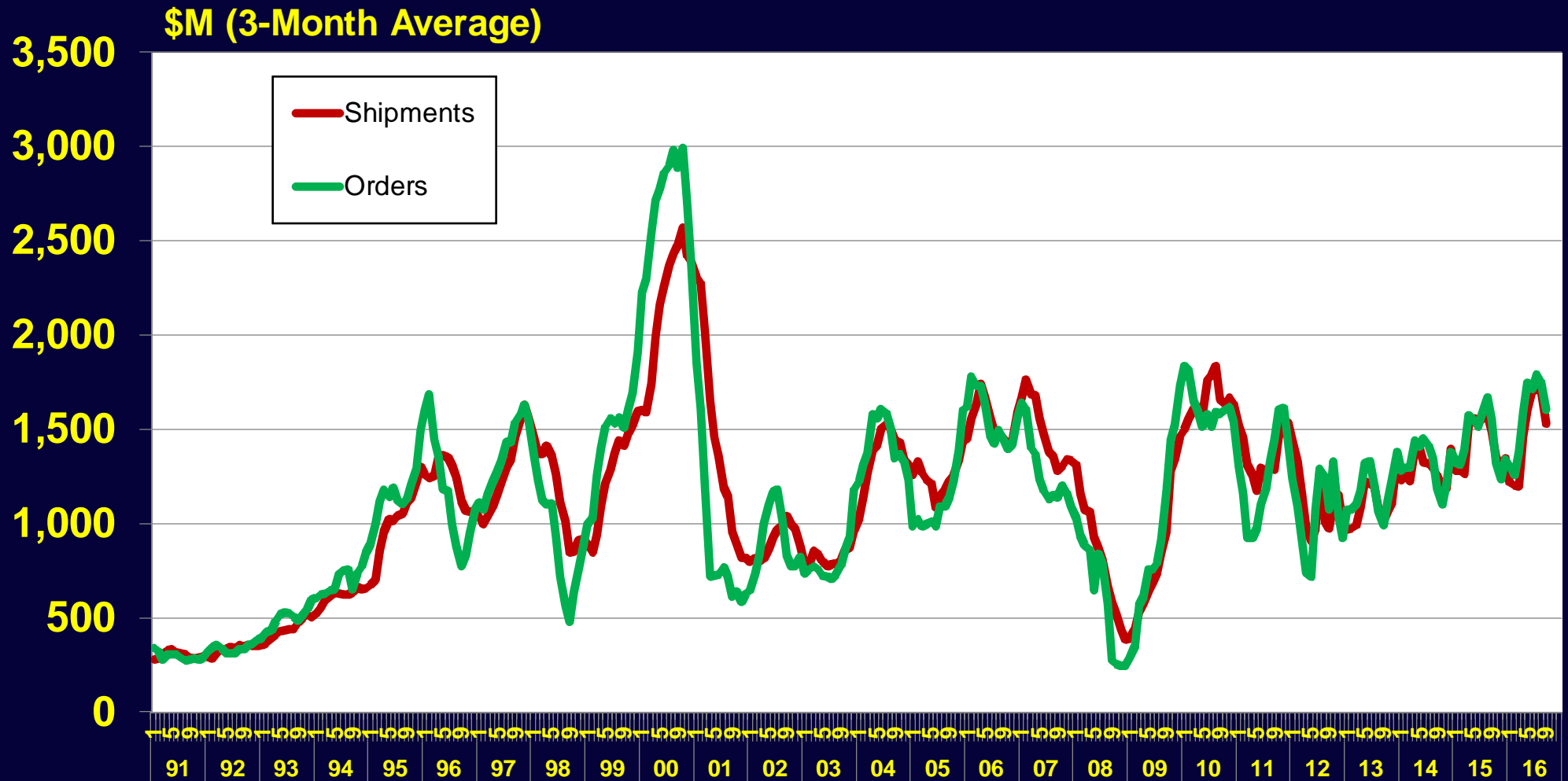
1990-2016F  
Average 8.9%

# N American Semiconductor Equipment Industry Book/Bill Ratio



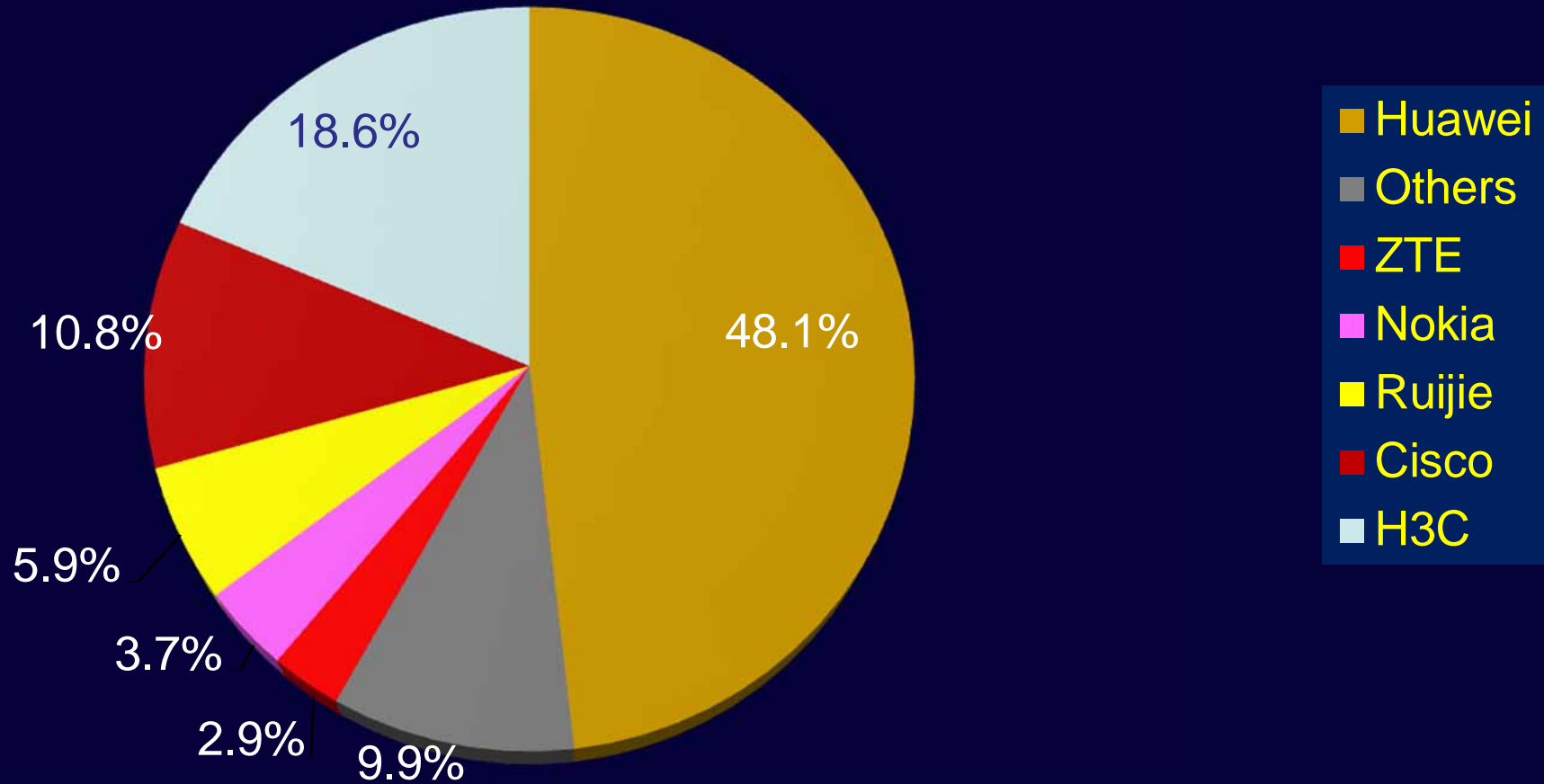
**SOURCE Semiconductor Equipment and Materials International**  
<http://www.semi.org>

# N American Semiconductor Equipment Industry Shipments & Orders



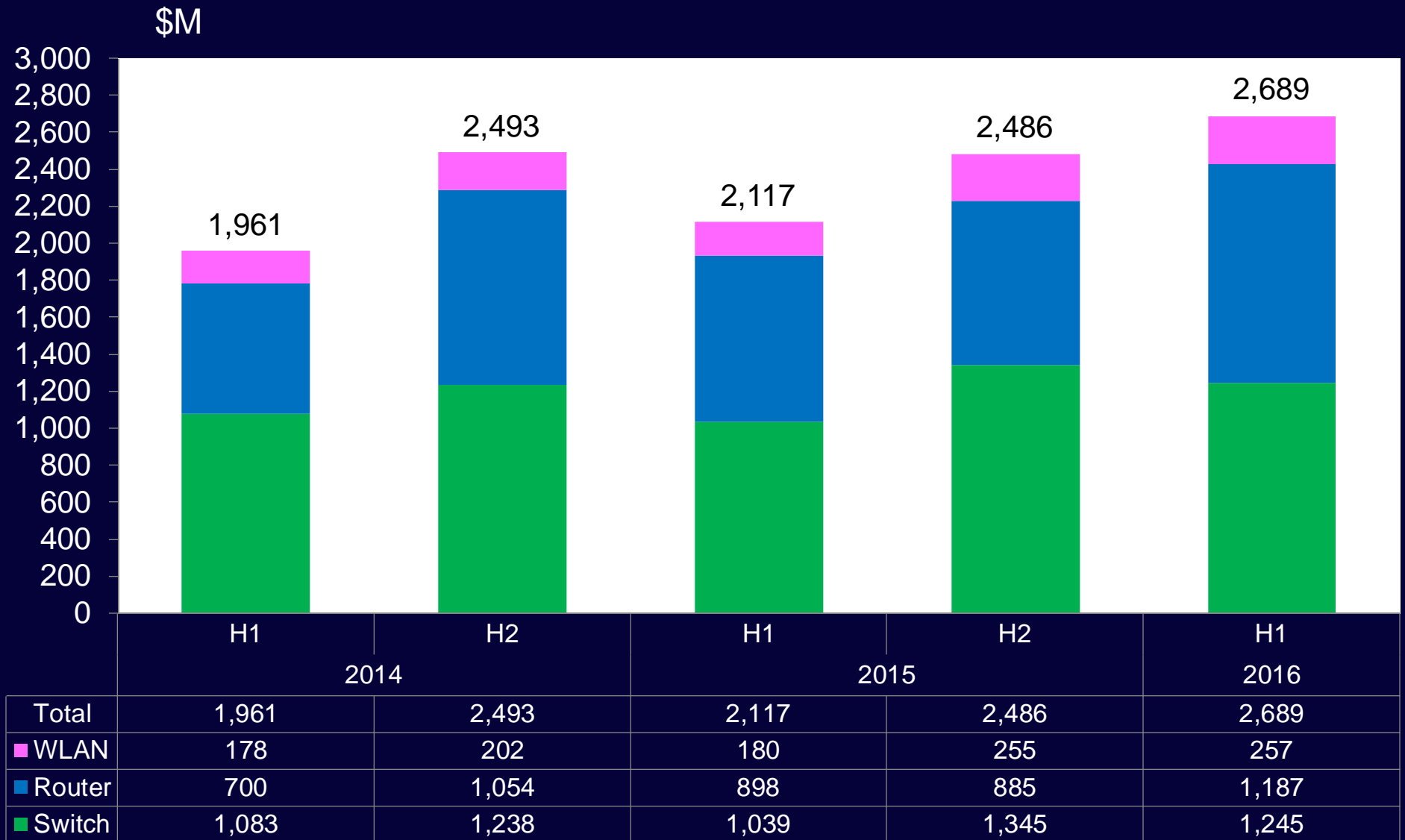
SOURCE Semiconductor Equipment and Materials International  
<http://www.semi.org>

# China Networking Market Share Q2'16



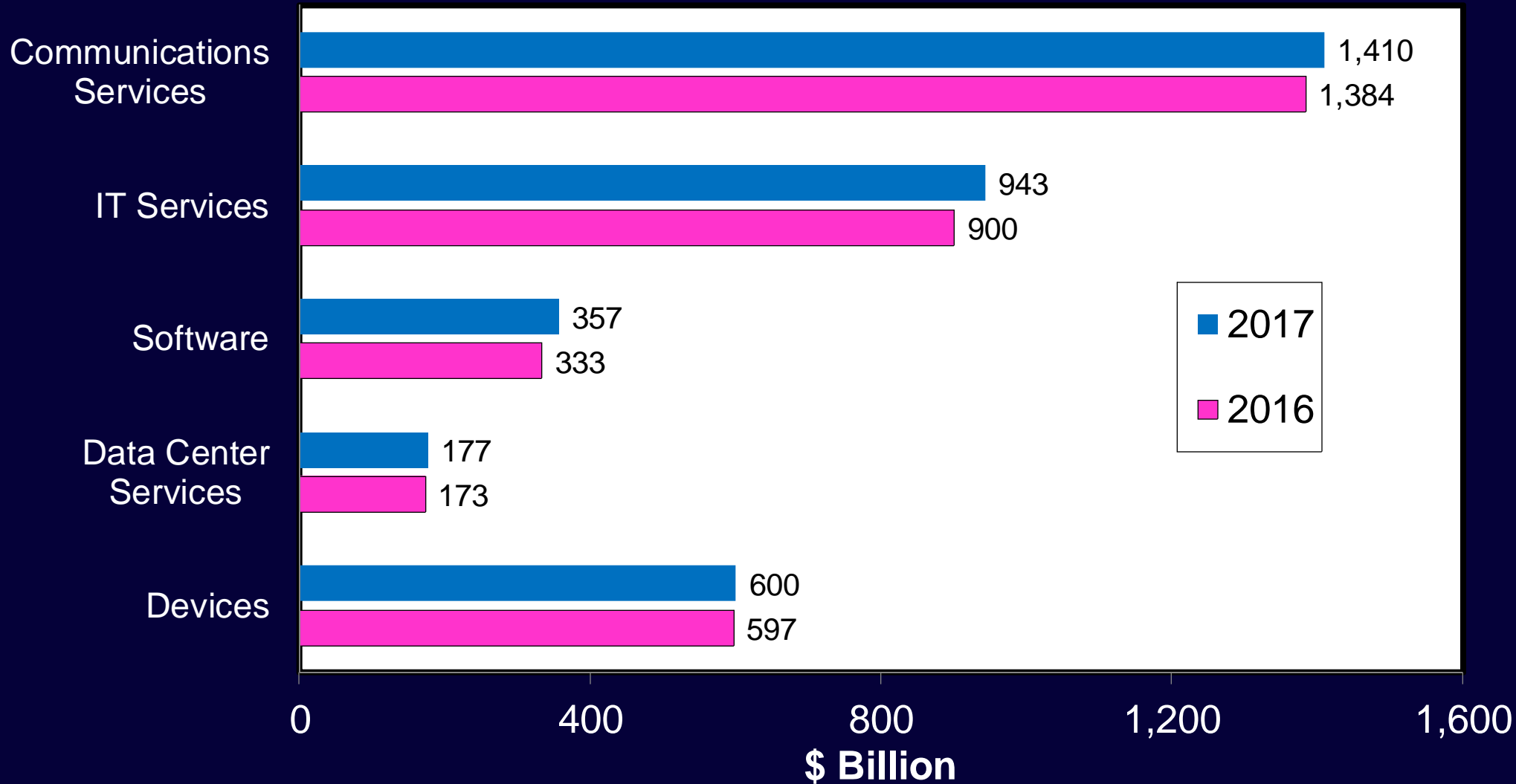
Q2'16 Total \$2,689 M

# China Networking Market Size





# IT Spending, World



# U.S. Industrial Production

Index (2012=100)



# Industrial Production – World

## % Change vs. One Year Earlier

Britain	+ 0.8 Aug
Czech Republic	+13.1 Aug
France	+ 0.5 Aug
Germany	+ 2.0 Aug
Italy	+ 4.1 Aug
Netherlands	+ 2.2 Aug
Russia	+ 0.7 Aug
Spain	+ 6.8 Aug
Euro Area	+ 1.8 Aug
Canada	- 0.7 Jul
USA	- 1.0 Sep
China	+ 6.1 Sep
India	- 0.7 Aug
Malaysia	+4.9 Aug
Vietnam	+ 7.6 Sep
Singapore	+ 0.1 Aug
S Korea	+ 2.3 Aug
Taiwan	+ 7.7 Aug
Thailand	+ 3.1 Aug
Japan	+ 4.5 Aug