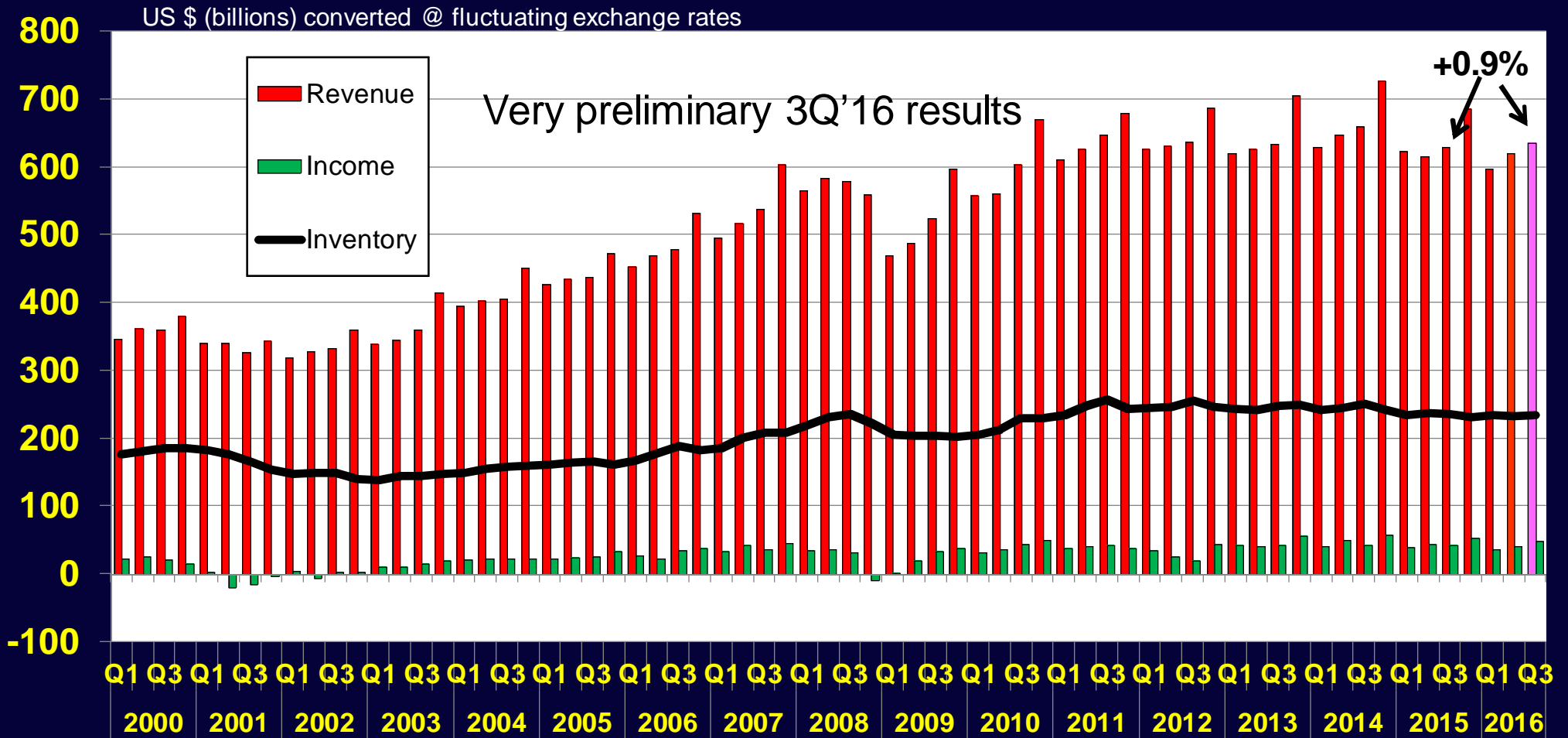


Chart 1

Electronic Equipment Suppliers

Composite of 213 Public Companies

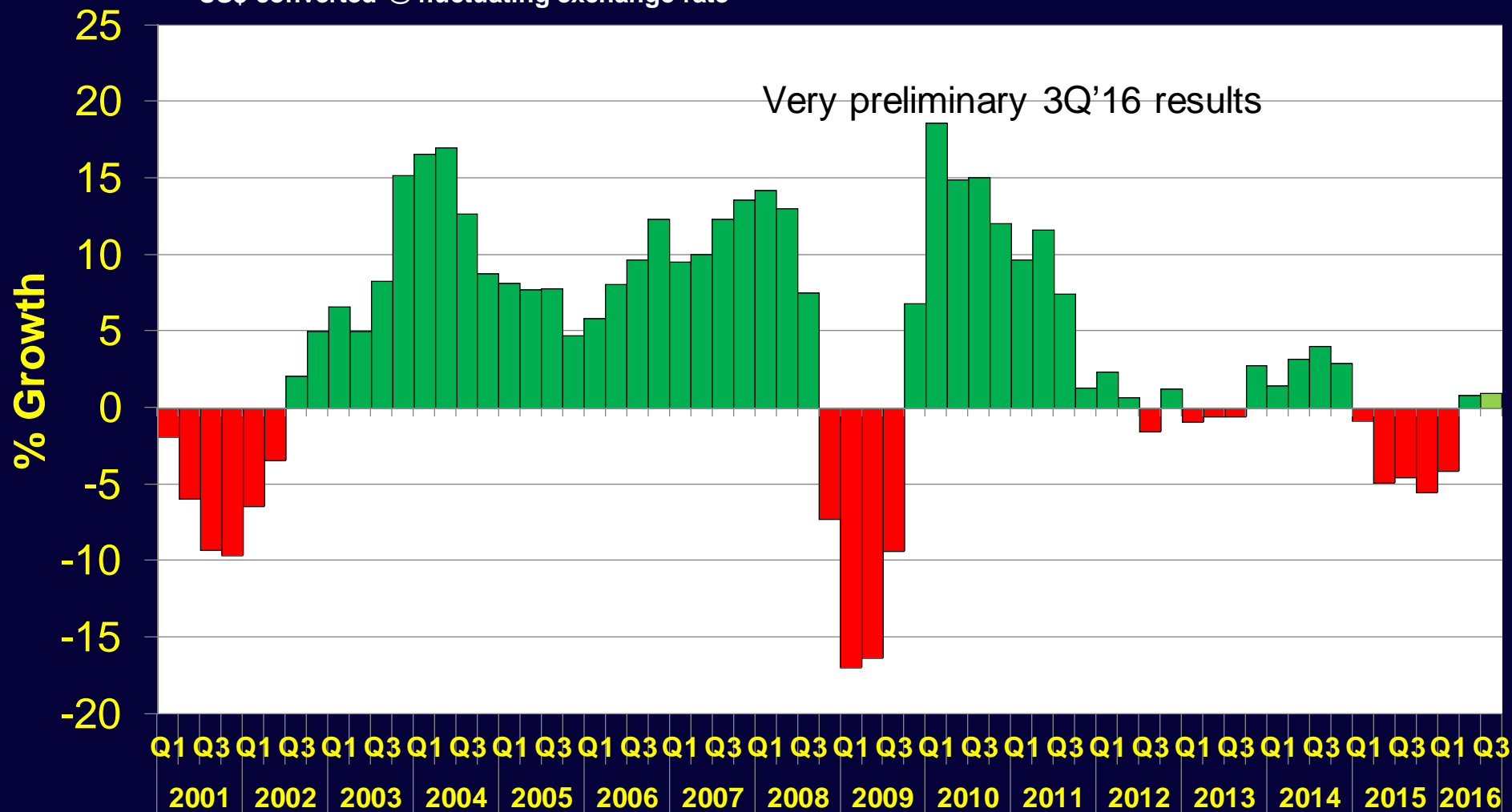
Revenue, Net Income & Inventory



Computer 13, Internet 13, Storage 17, Communication 30, SEMI 40, Medical 21, Instruments 16, Military 21, Business & Office 6, Consumer 21, Automotive 15

Electronic Equipment Suppliers Composite of 213 Public Companies Quarterly Revenue Growth

US\$ converted @ fluctuating exchange rate



World Electronic Equipment Production By Type

+0.9%

Annual Rate \$B (converted @ fluctuating exchange rates)

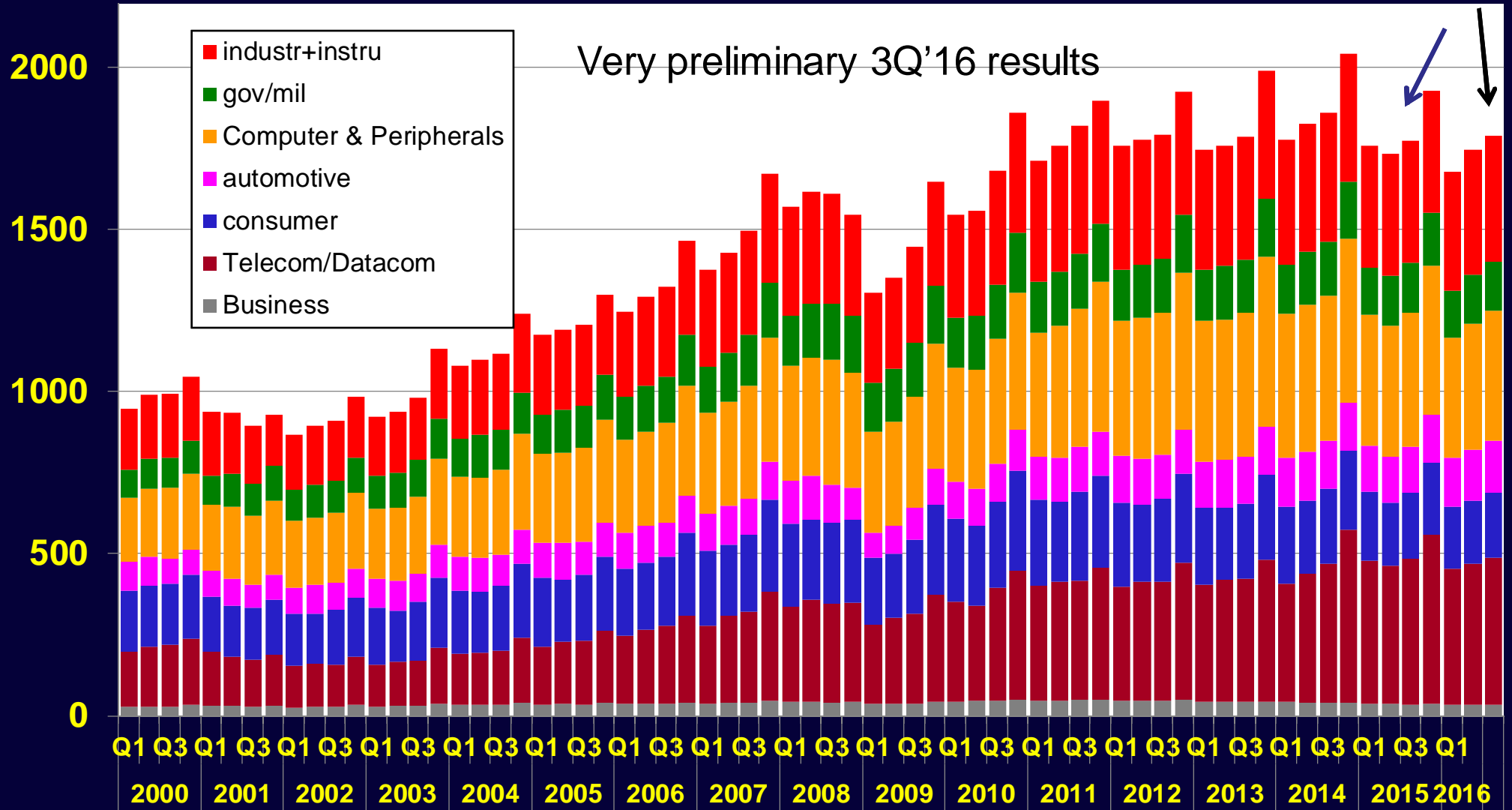
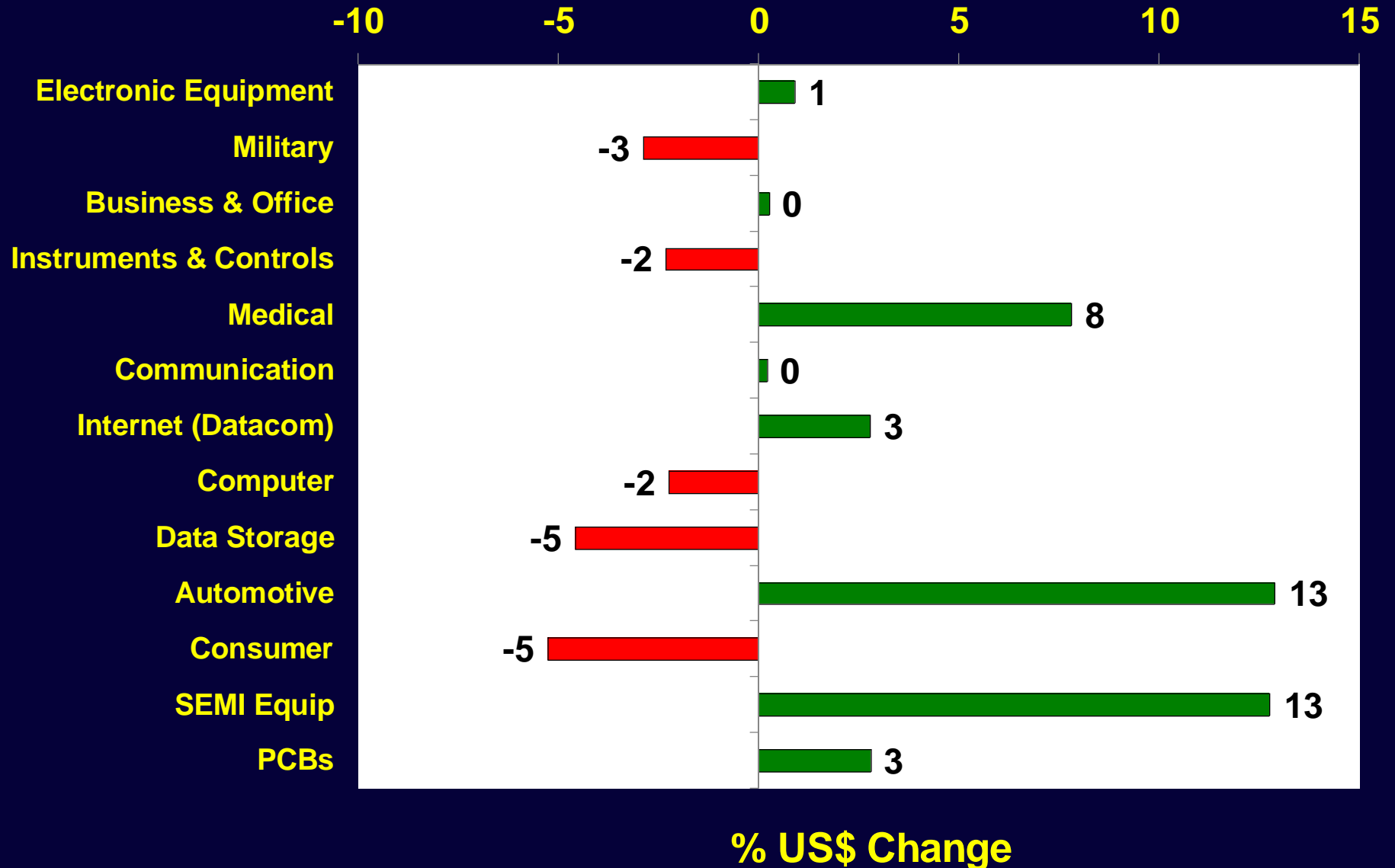


Chart 4

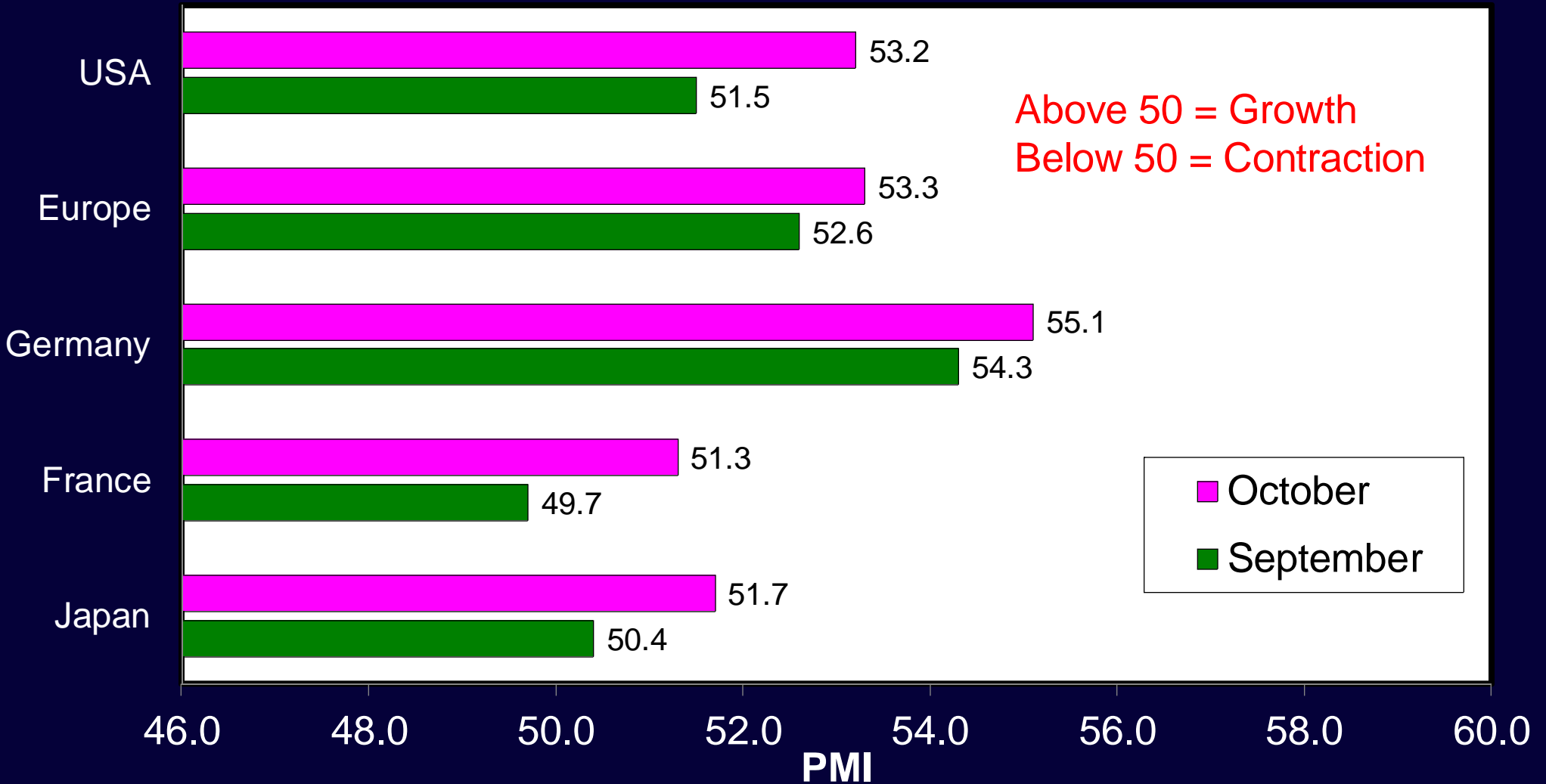
Global Electronic Supply Chain Growth 3Q'16 vs. 3Q'15 (very preliminary estimate)



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

Chart 5

Purchasing Managers' Indices October (Flash) vs. September 2016



U.S "Purchasing Managers" Index

Market Economics

Diffusion Index, >50 = Growth

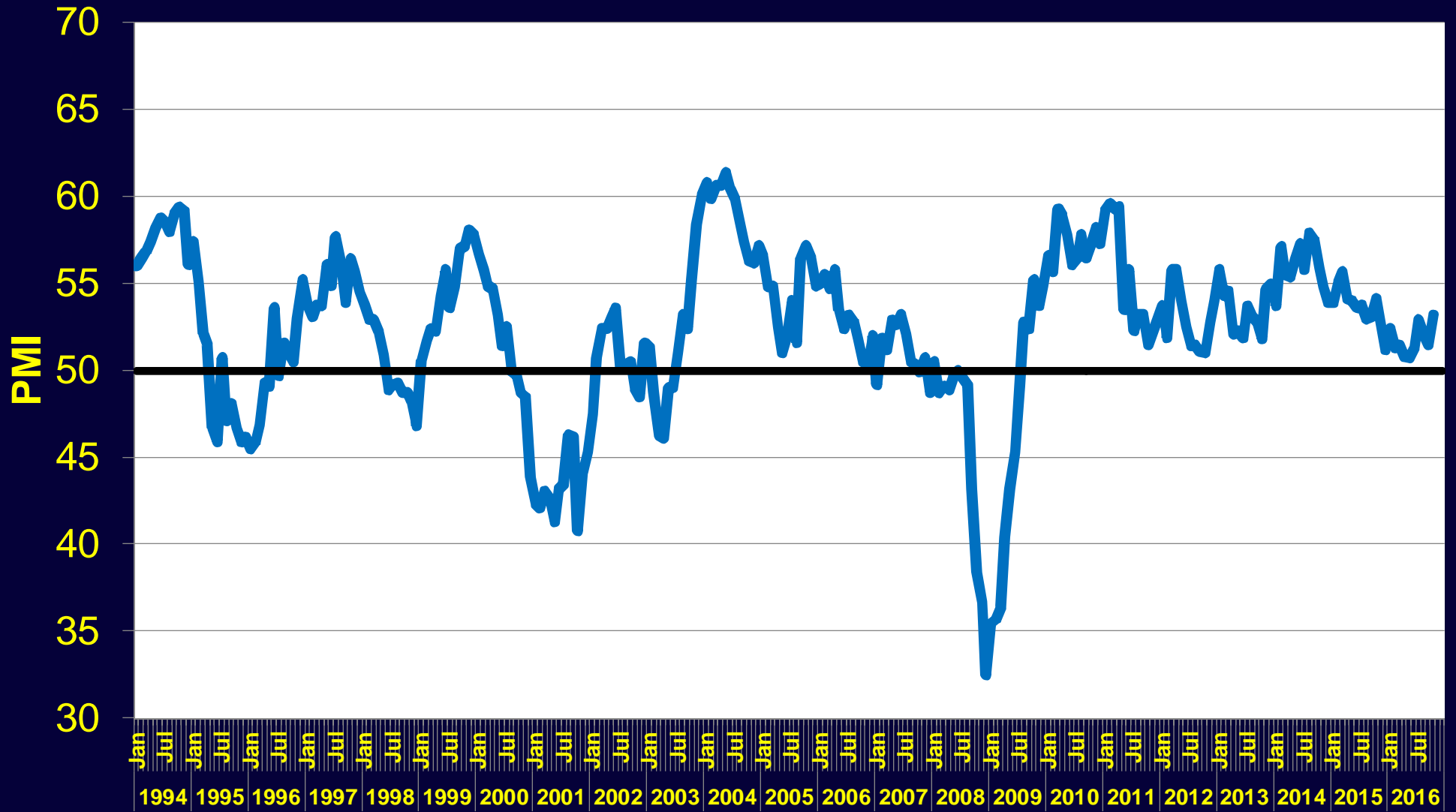
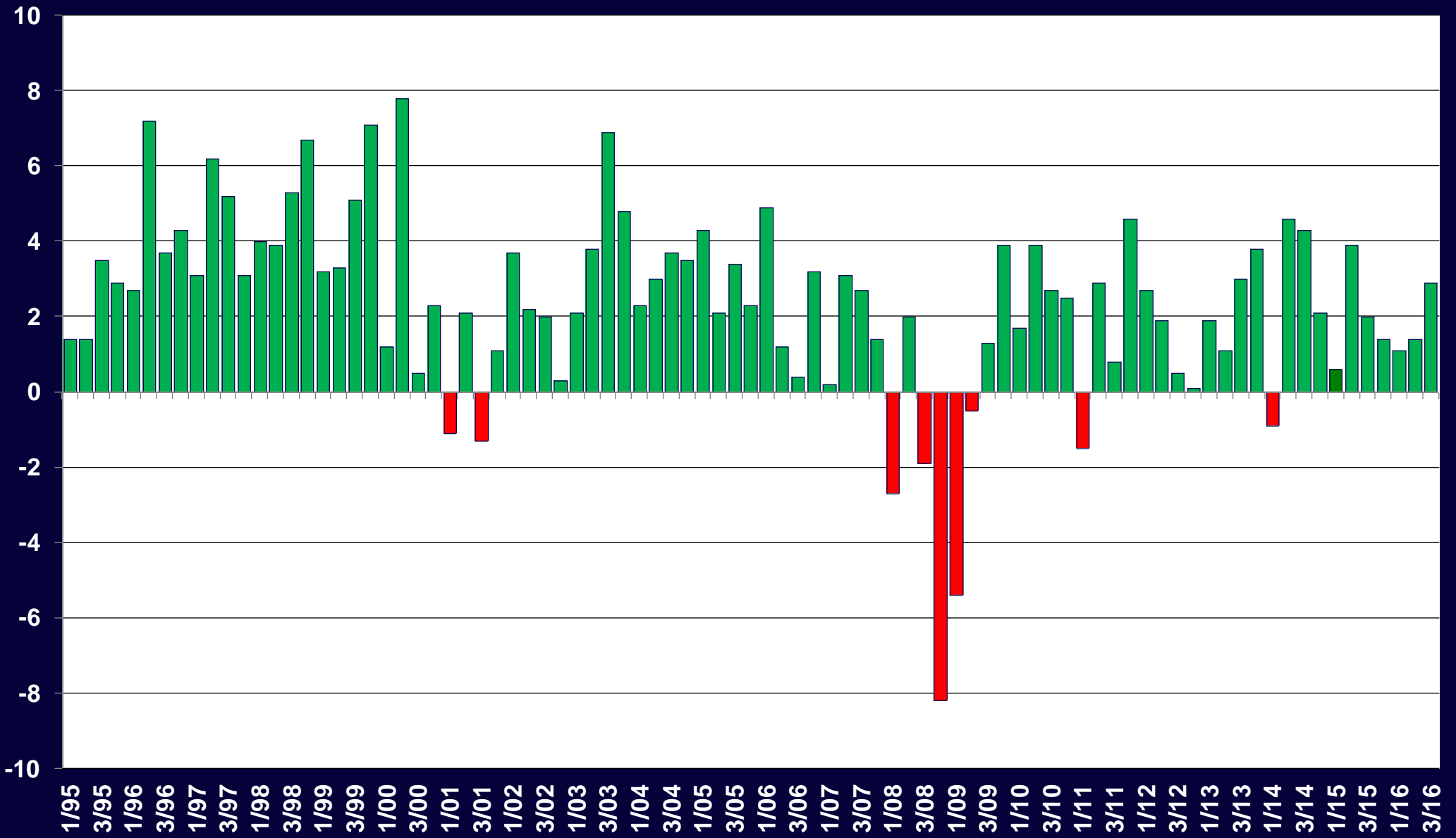


Chart 7

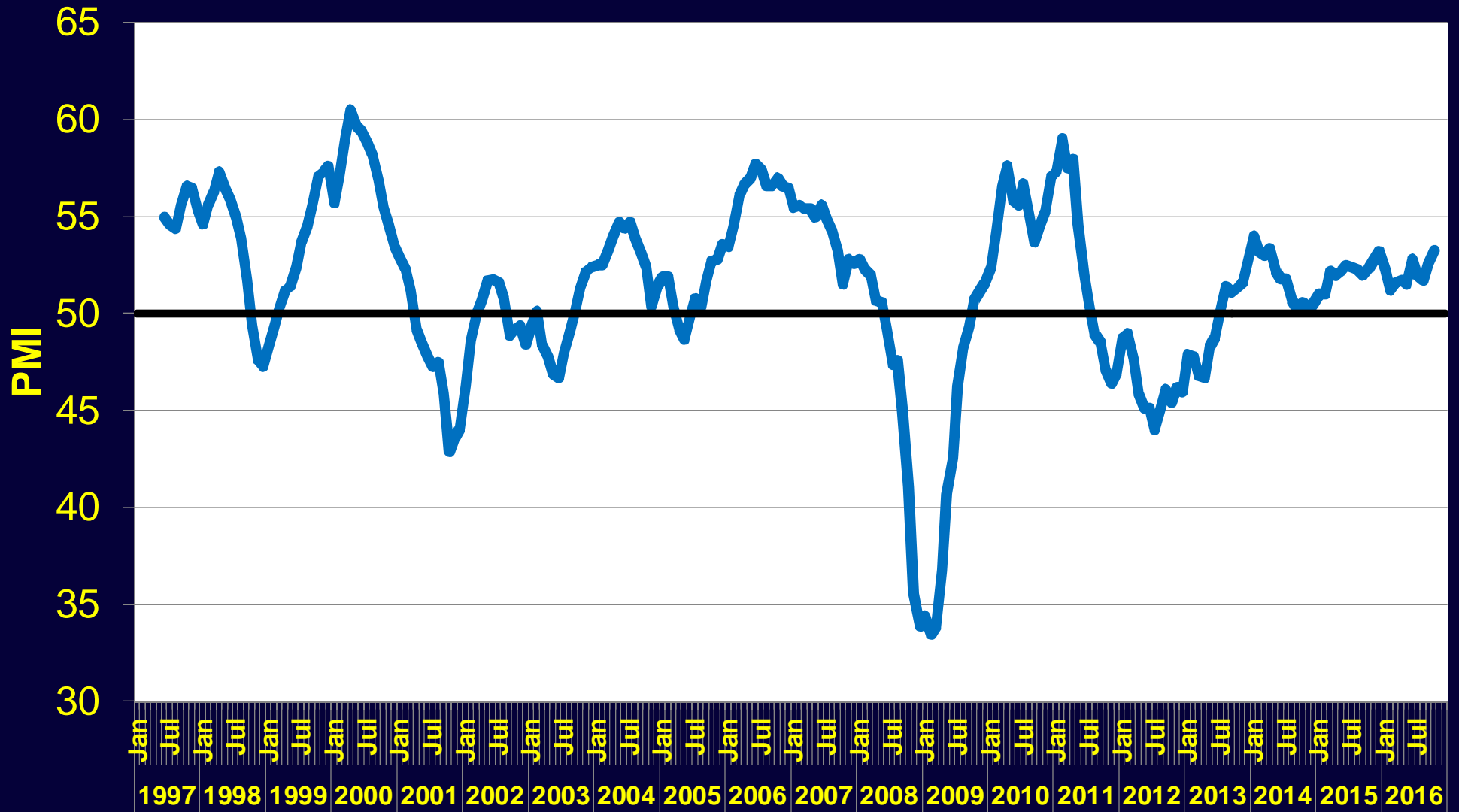
U.S. GDP Growth

% Change vs. Prior Quarter (Chained 2009 \$)



Eurozone "Purchasing Managers" Index

Diffusion Index, >50 = Growth



Japan "Purchasing Managers" Index

Diffusion Index, >50 = Growth

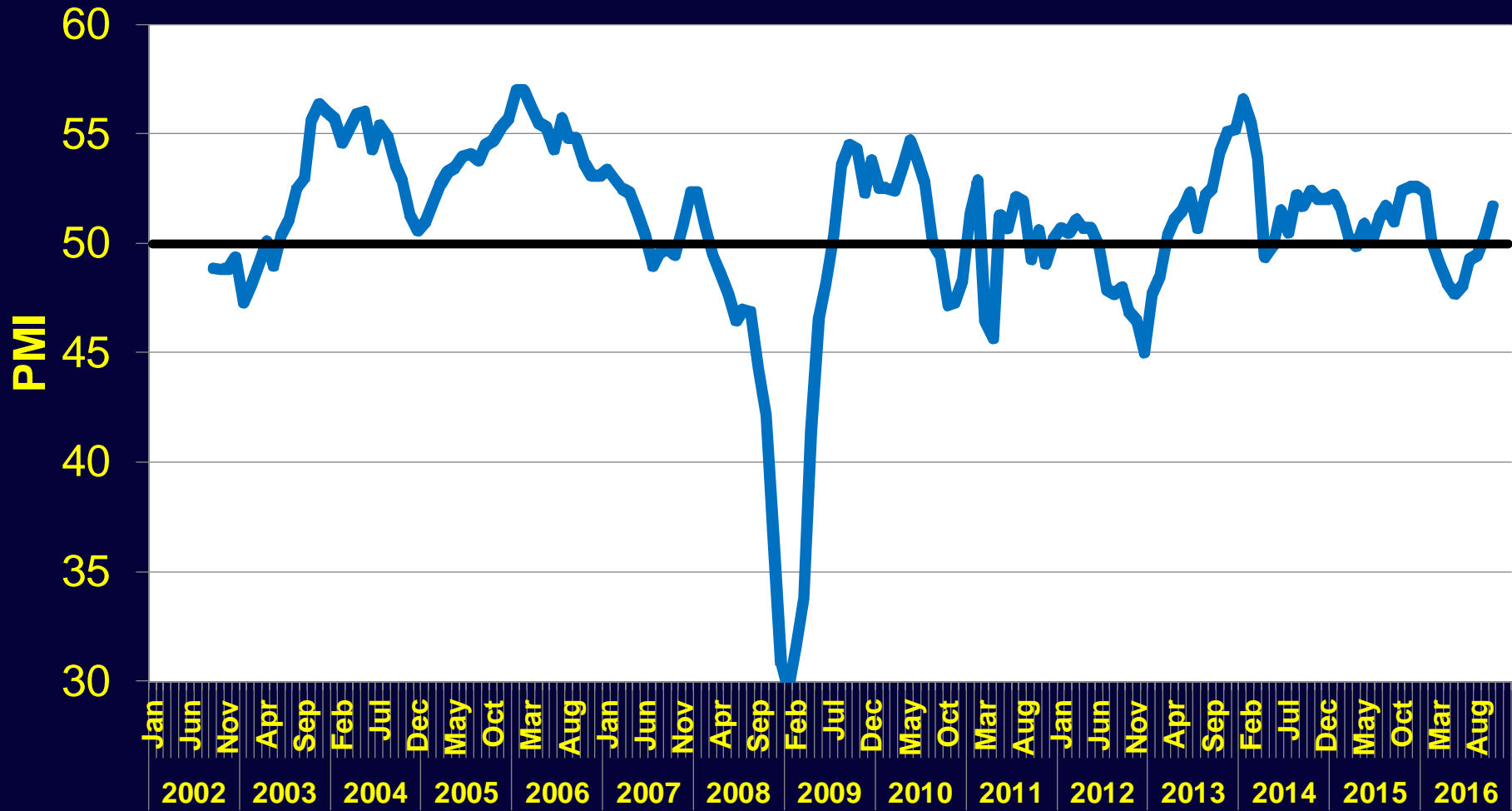
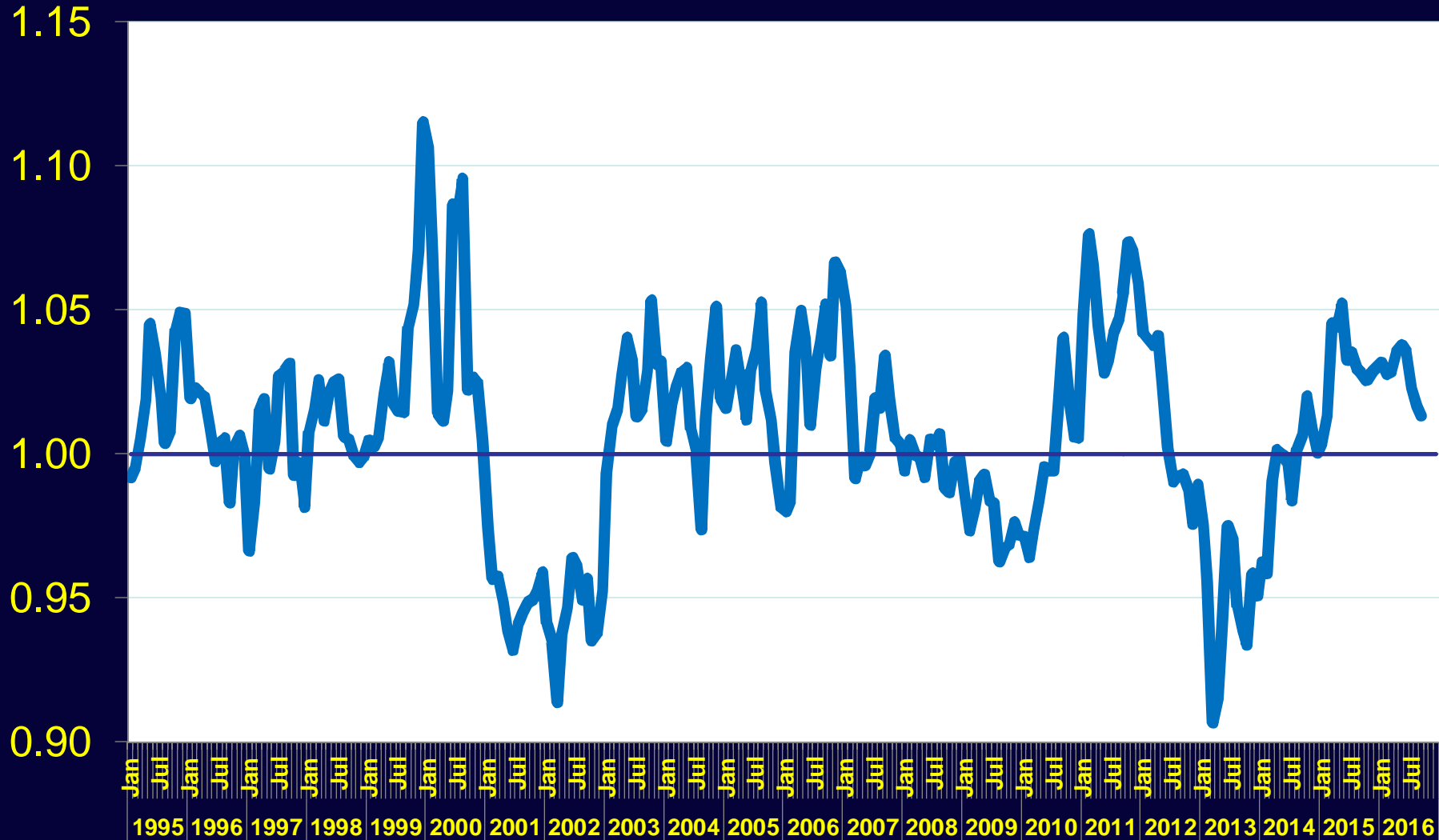


Chart 10

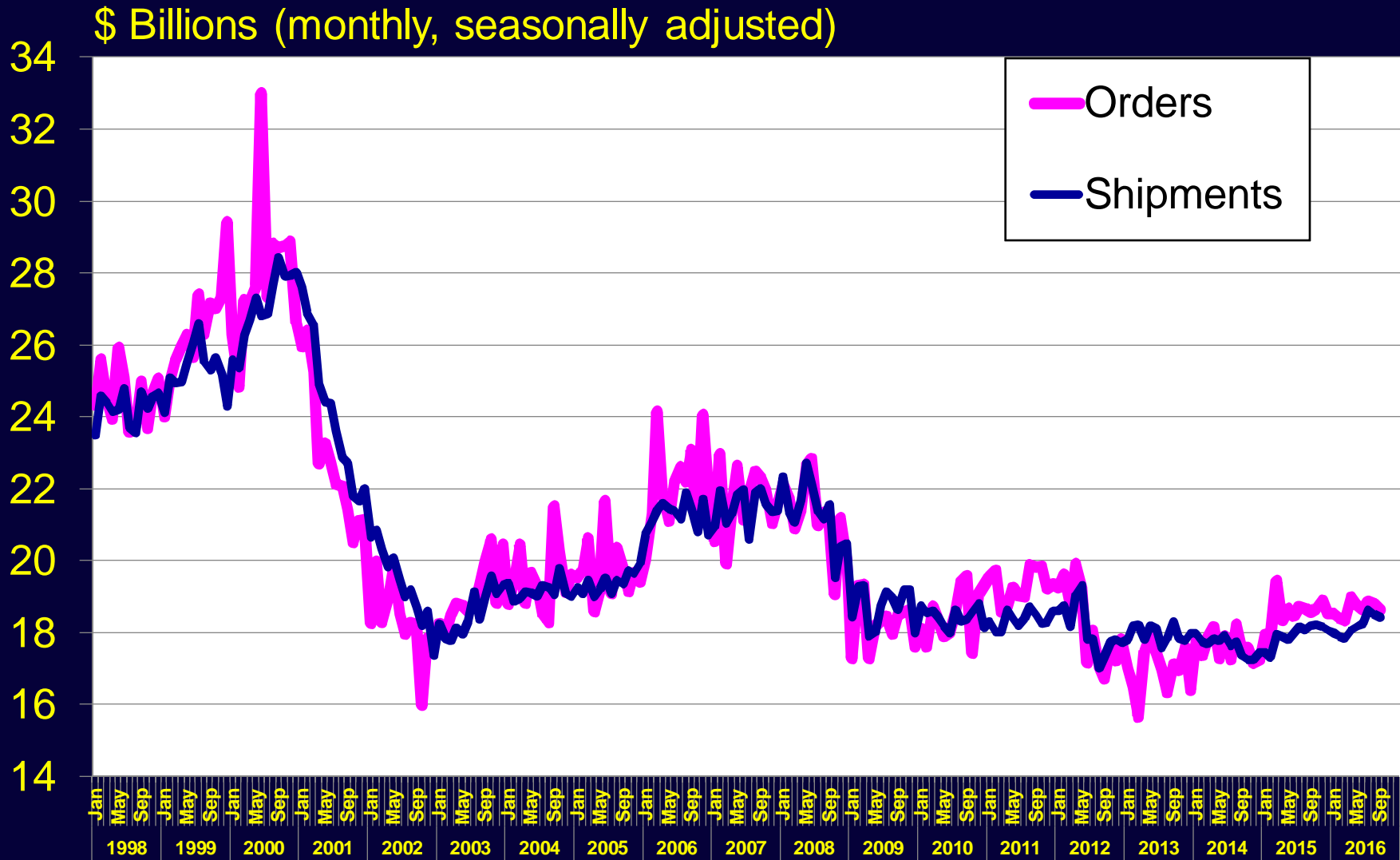
U.S. Electronic Equipment Book/Bill Ratio

3-Month Average



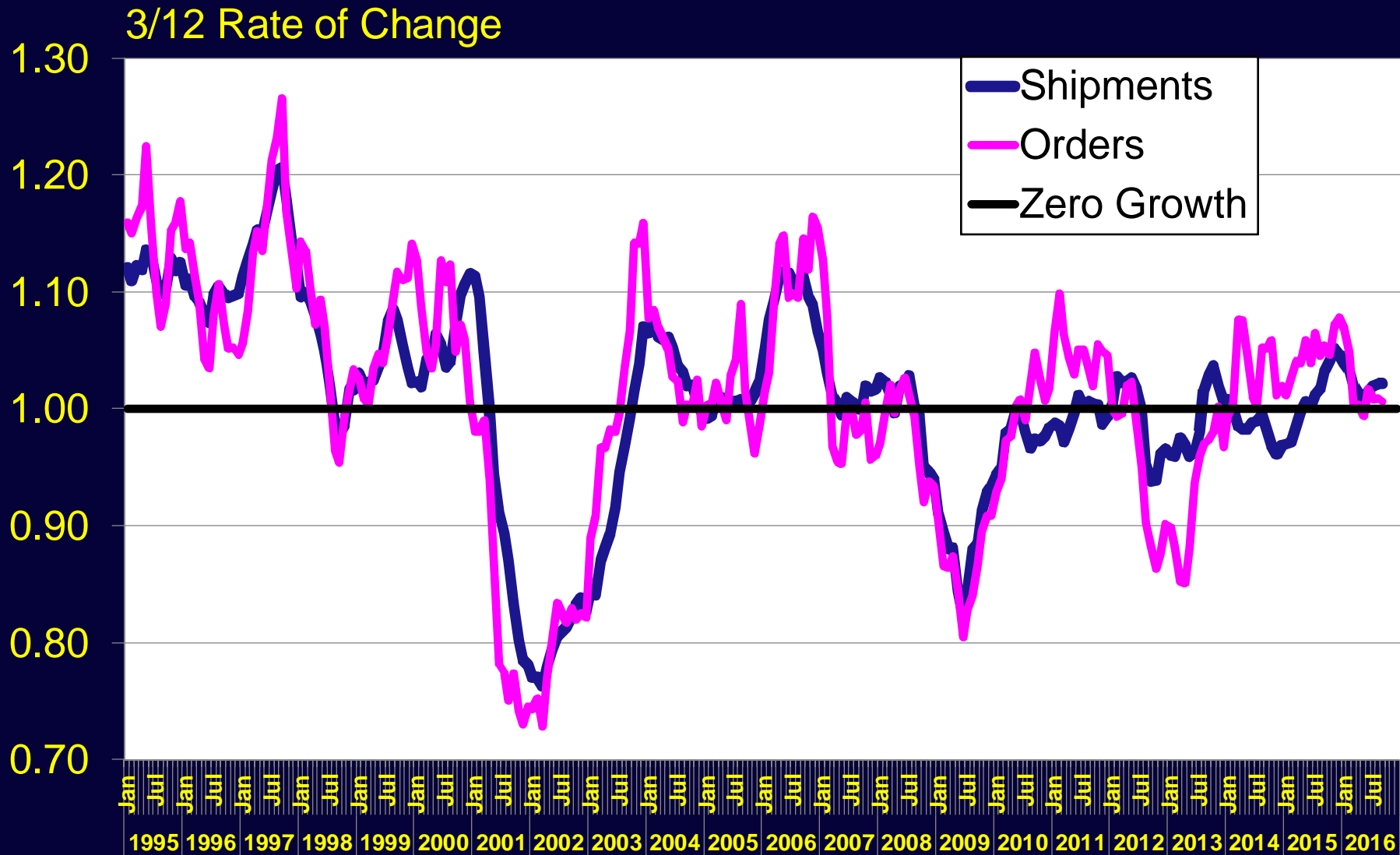
U.S. Electronic Equipment Orders & Shipments

Computer, Communications, Measurement & Control and Military

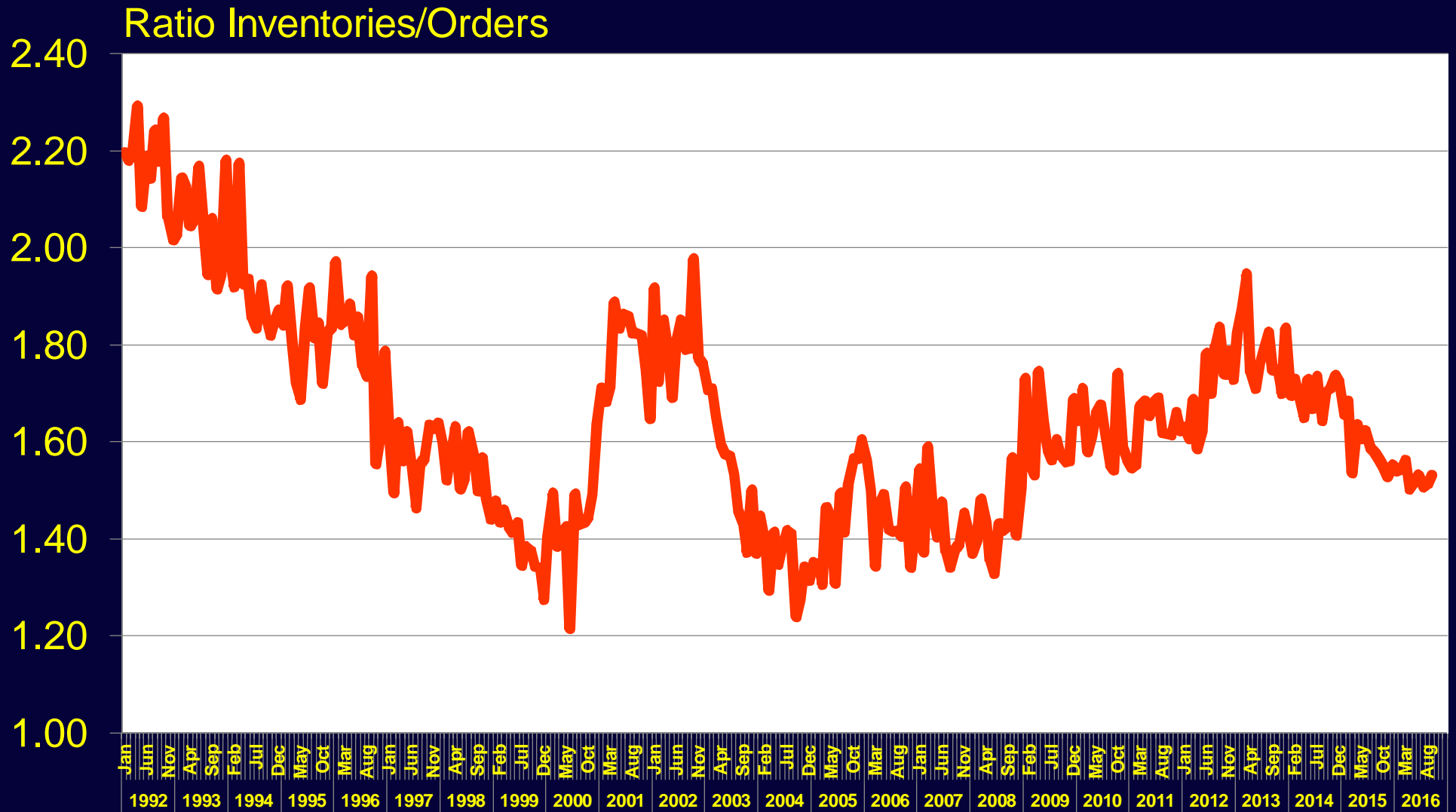


U.S. Electronic Equipment Order & Shipment Growth

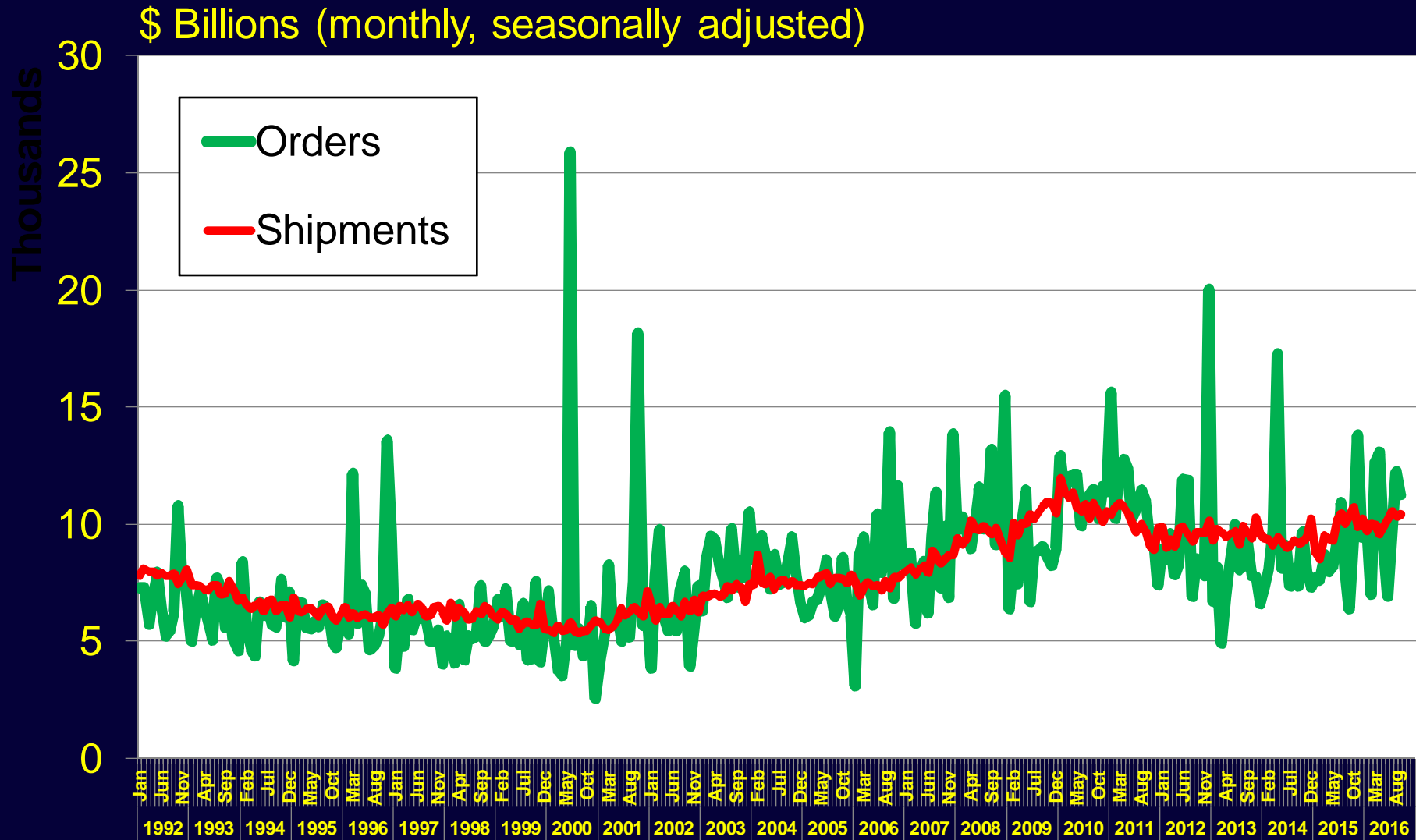
Computer, Communications, Measurement & Control and Military



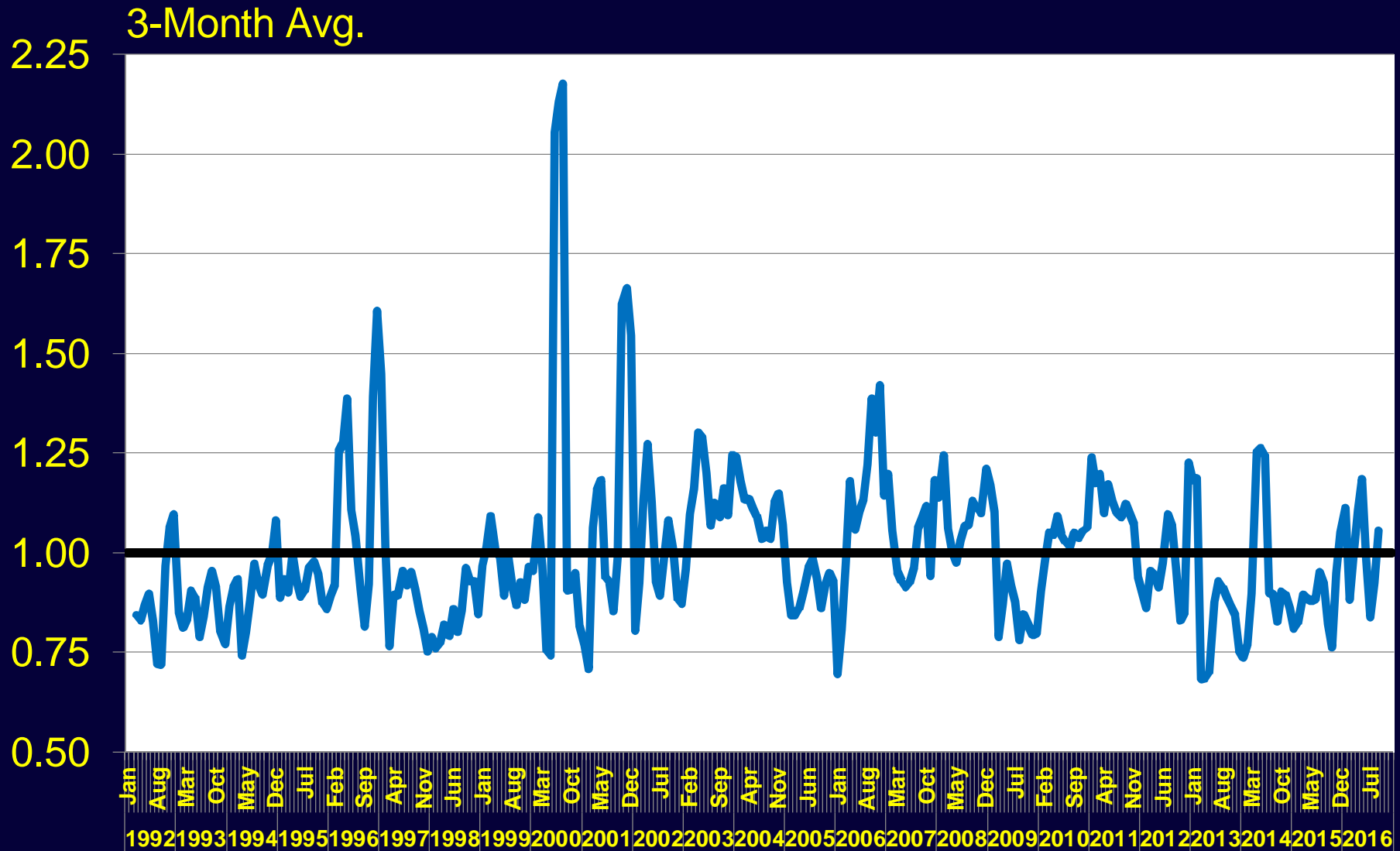
U.S. Electronic Equipment Inventories vs. Orders



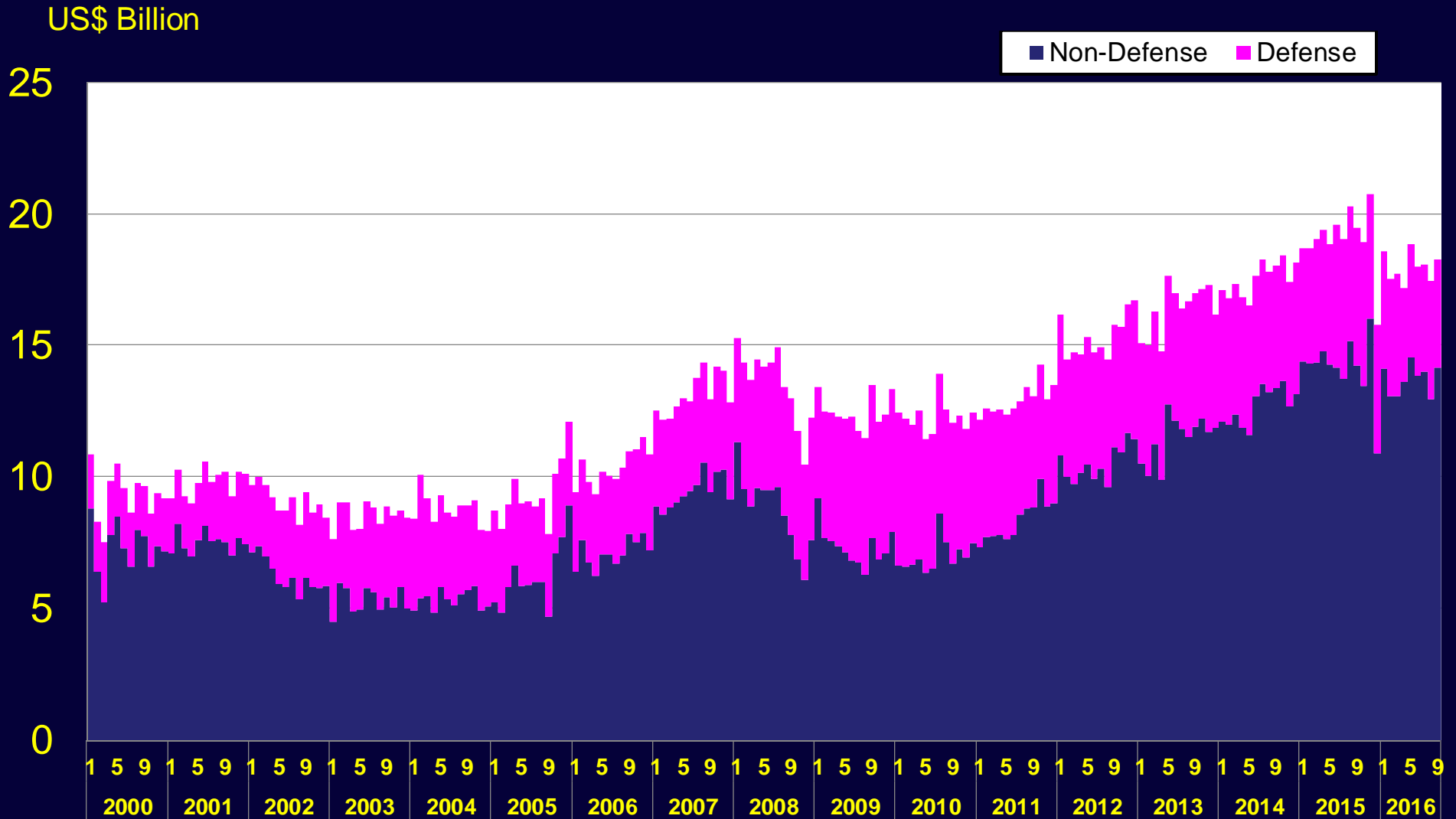
U.S. Defense Capital Goods Orders & Shipments



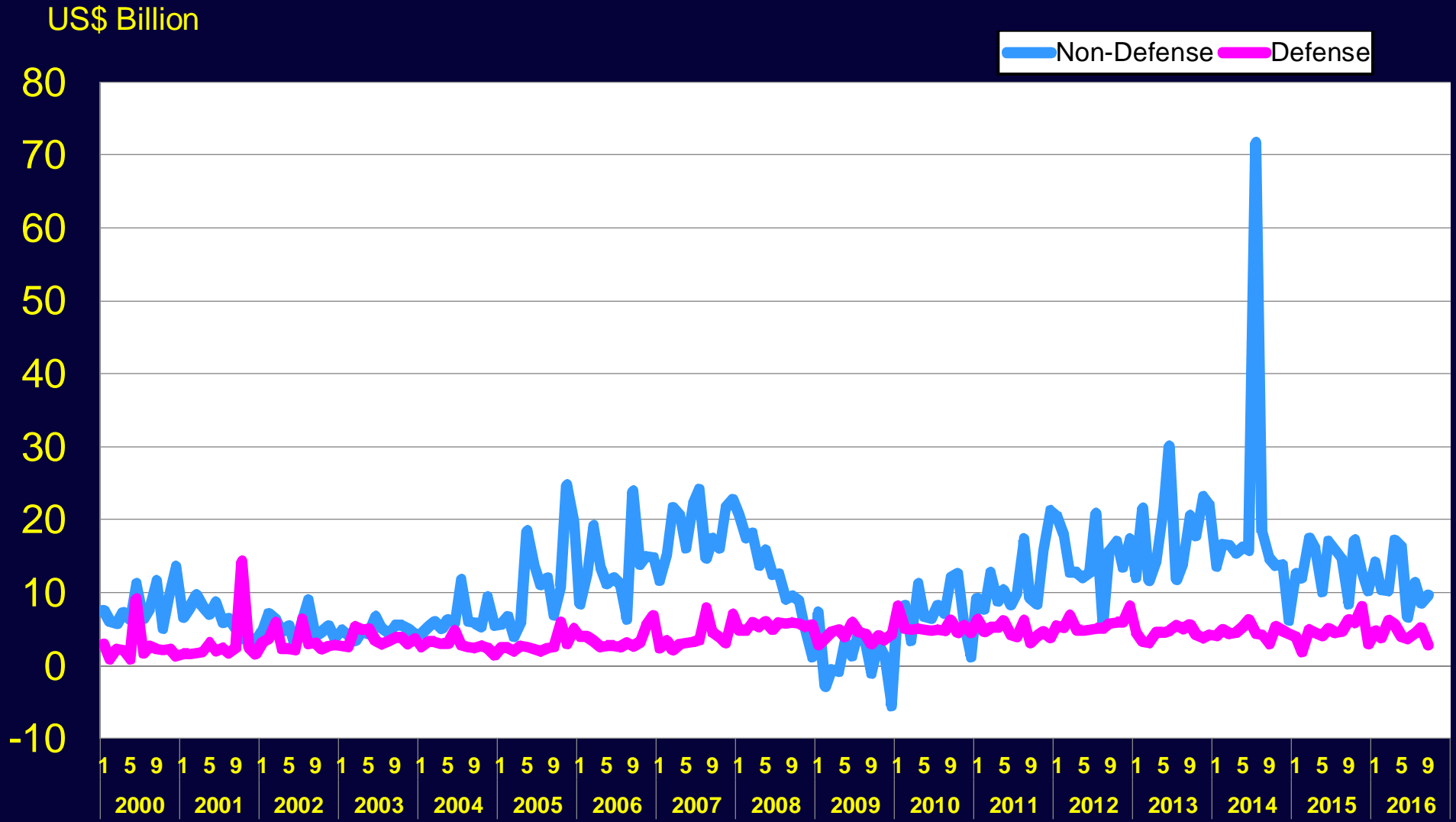
U.S. Defense Capital Goods Book/Bill Ratio



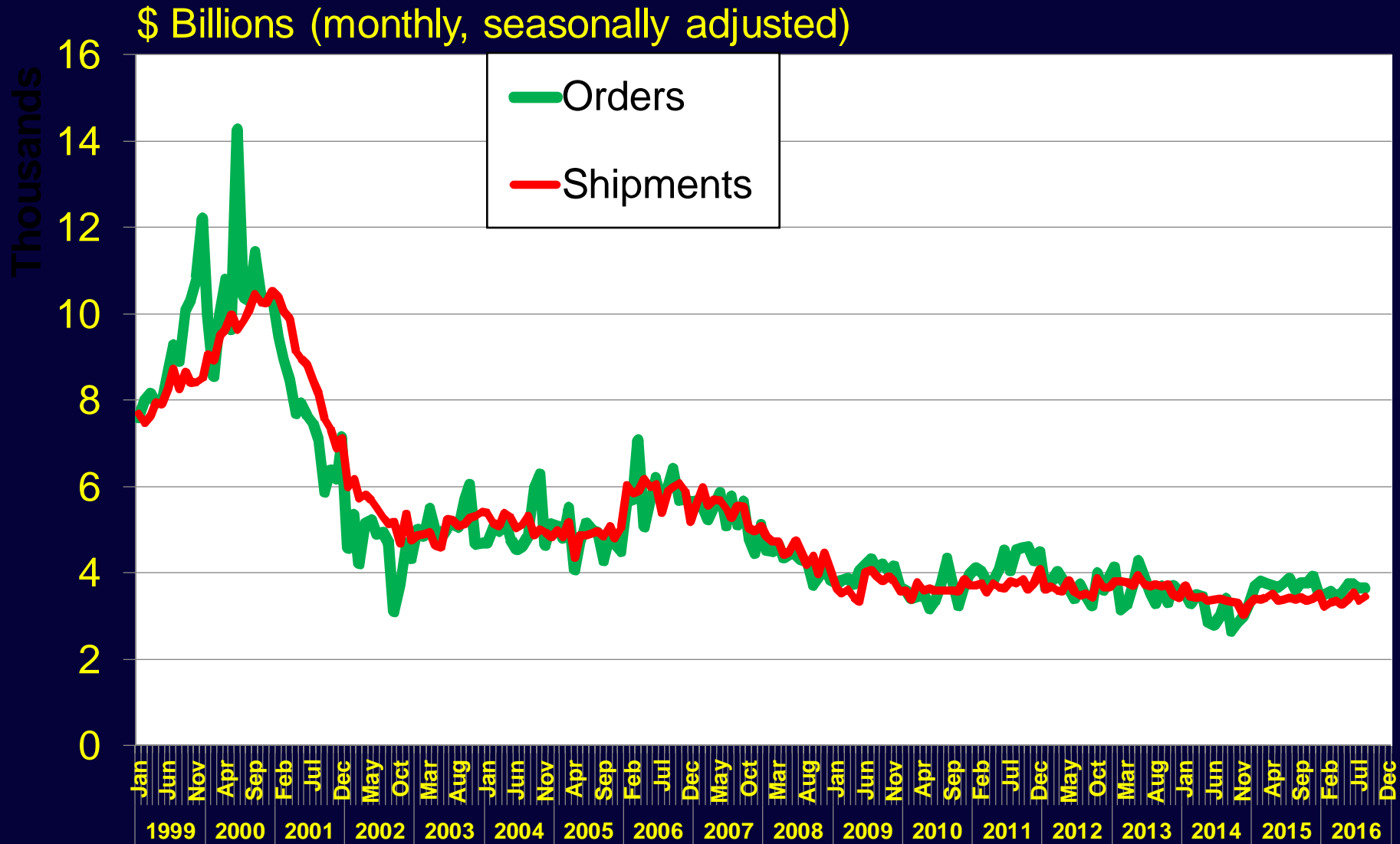
U.S. Aircraft & Parts Shipments



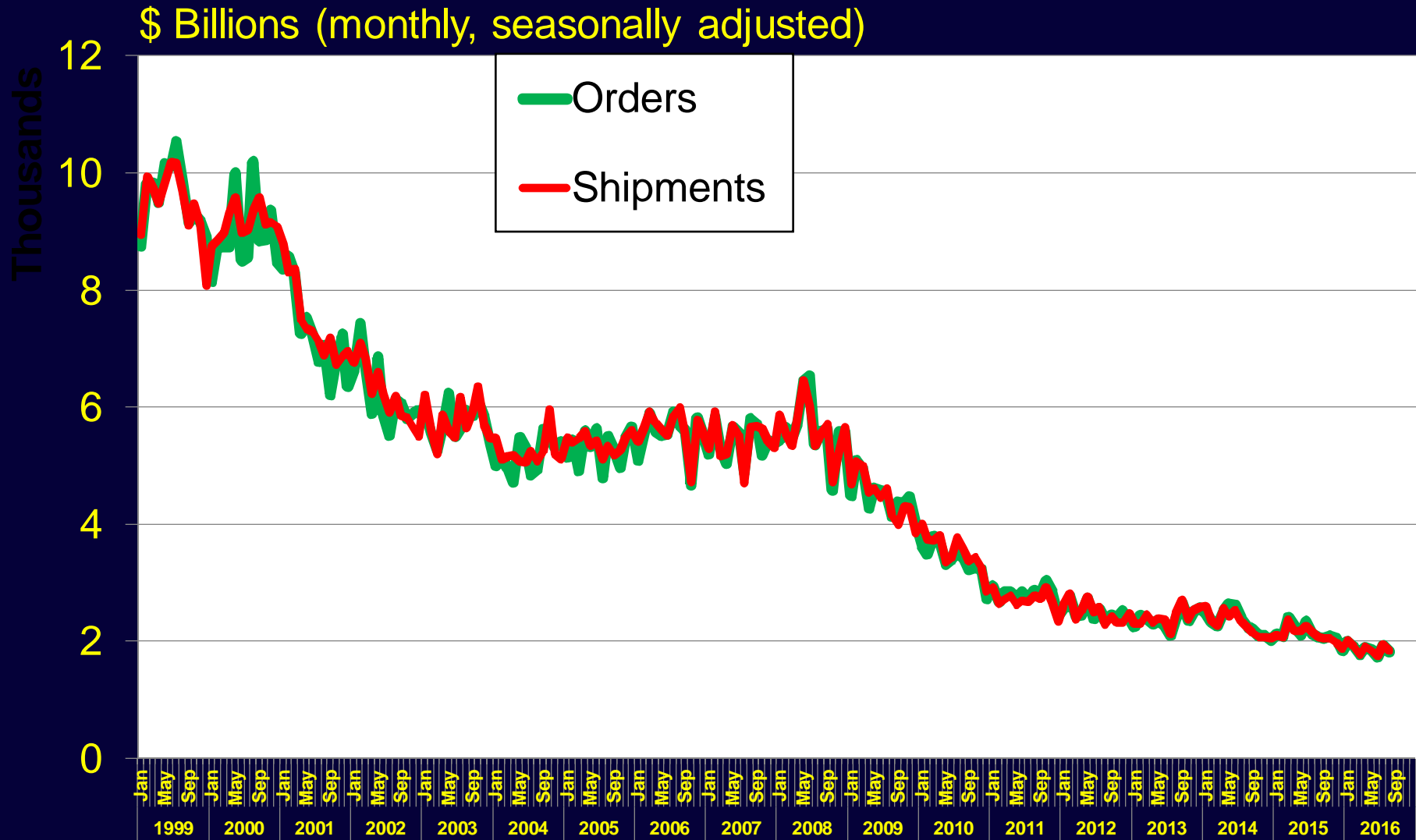
U.S. Aircraft & Parts Orders



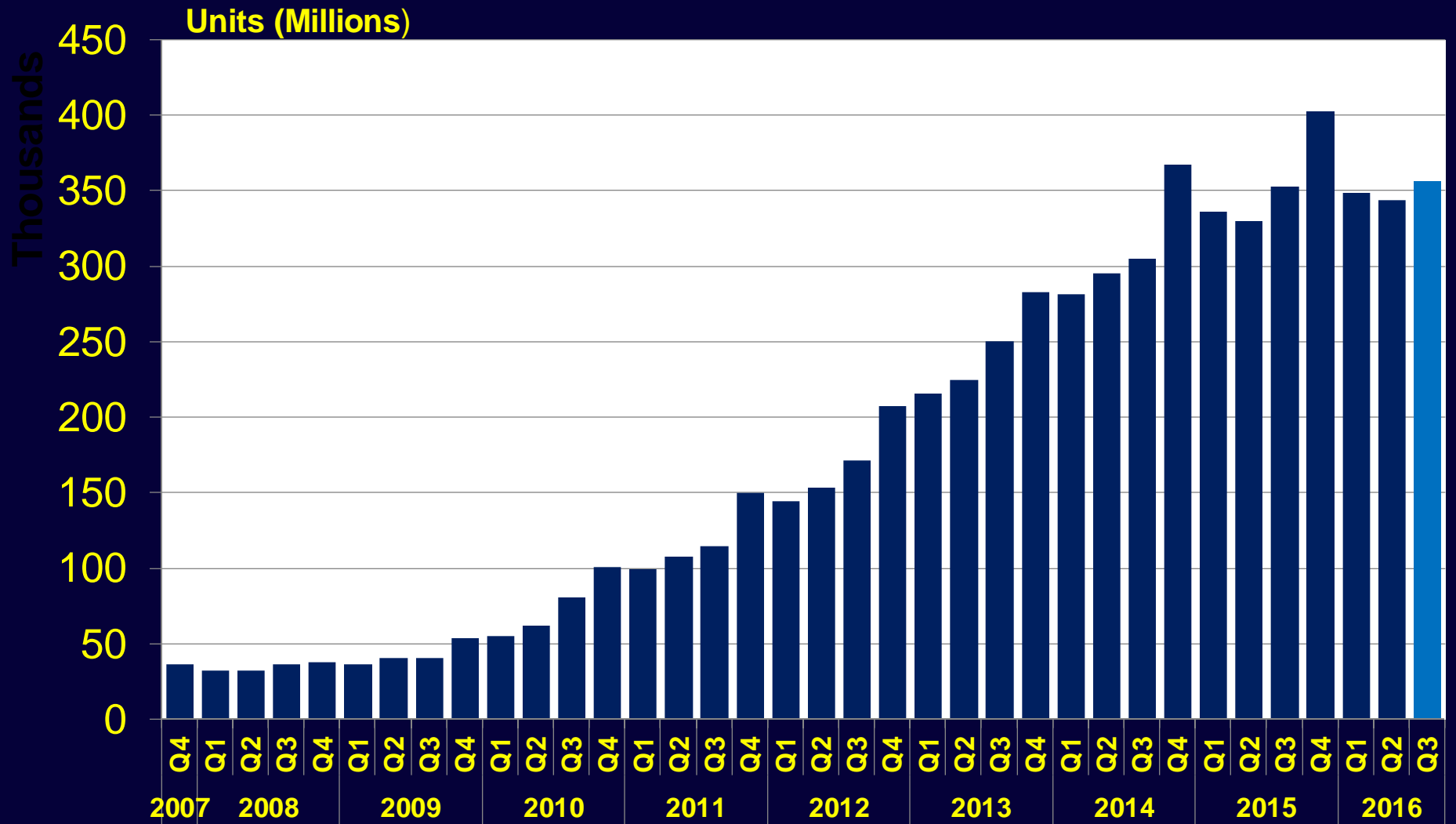
U.S. Communication Equipment Orders & Shipments



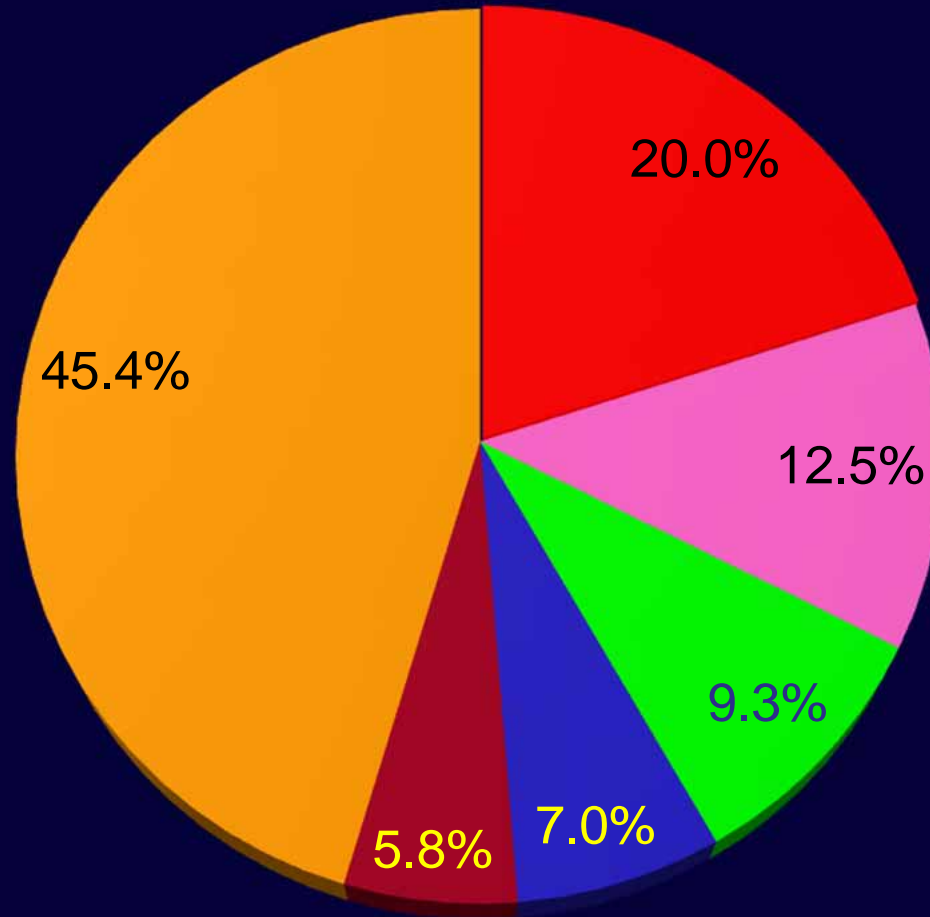
U.S. Computers & Related Products Orders & Shipments



Smartphone Unit Shipments to End Users World

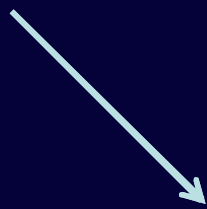


World Smartphone Sales 3Q'16



- Samsung
- Apple
- Huawei
- OPPO
- vivo
- Others

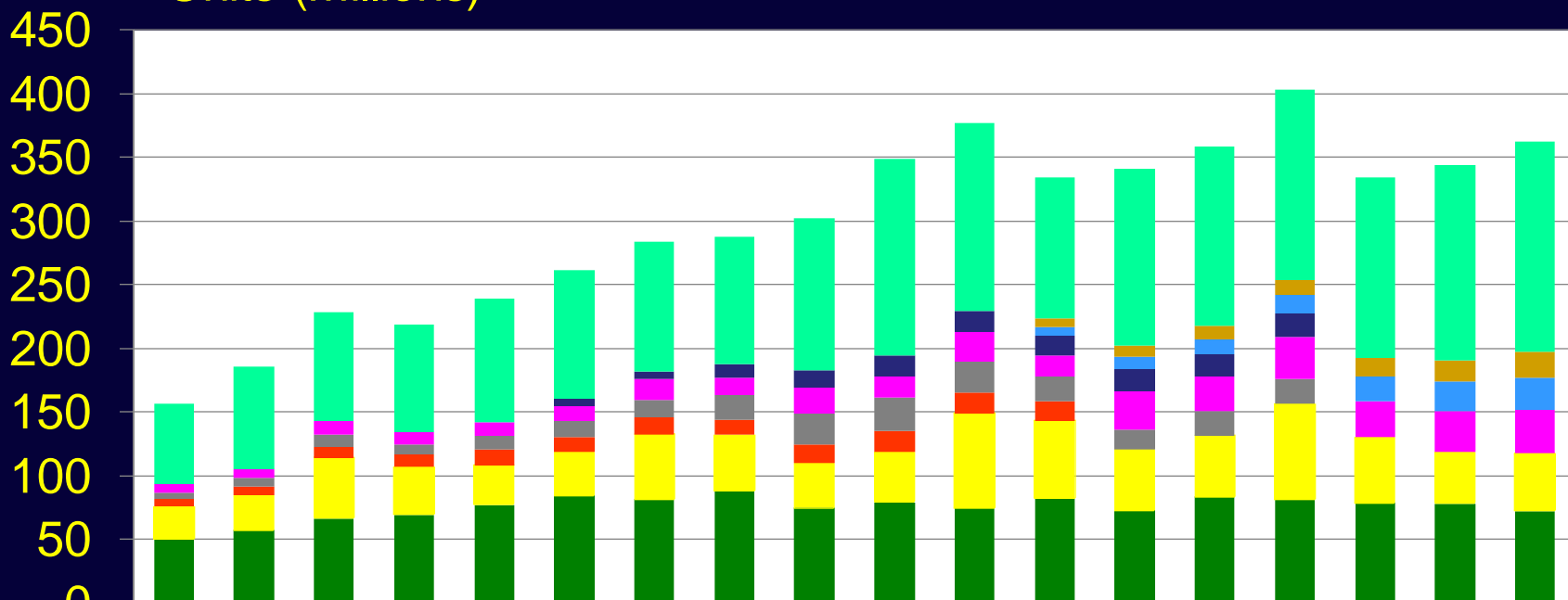
3Q'15
359.3 M



3Q'16 TOTAL: 362.9 Units

Smartphones World Top Vendors

Units (millions)

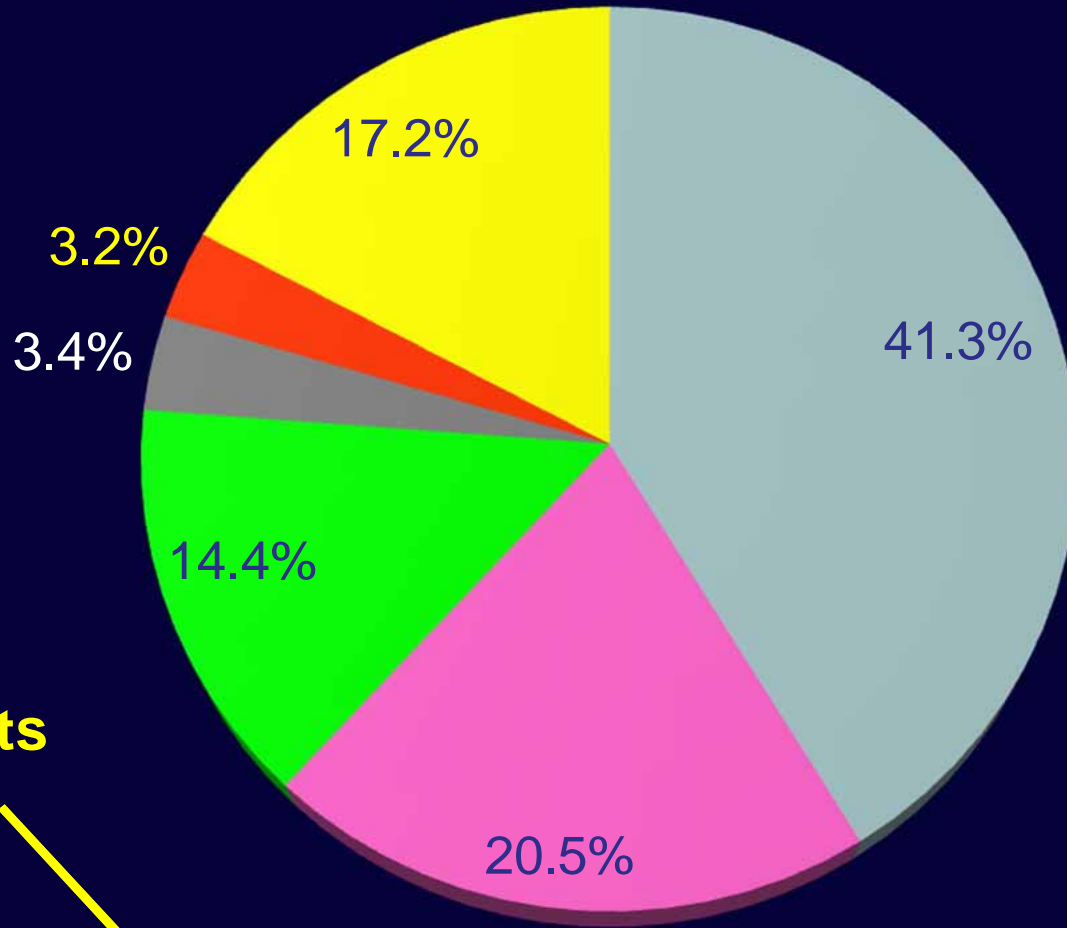


	2012 Q2	2012 Q3	2012 Q4	2013 Q1	2013 Q2	2013 Q3	2013 Q4	2014 Q1	2014 Q2	2014 Q3	2014 Q4	2015 Q1	2015 Q2	2015 Q3	2015 Q4	2016 Q1	2016 Q2	2016 Q3
Others	63.0	80.6	85.9	84.2	97.5	101.0	102.0	100.4	119.2	154.2	147.4	110.6	138.5	140.4	149.0	141.5	154.3	164.8
VIVO												6.4	9.1	10.5	12.1	14.6	16.5	21.2
OPPO												7.3	9.5	11.4	14.4	19.7	22.7	25.3
Xiaomi						5.6	5.9	11.0	13.8	17.3	16.6	15.0	17.9	18.3	18.2			
Huawei	6.5	7.1	10.5	9.3	10.4	12.0	16.4	13.5	20.2	16.5	23.6	17.4	29.6	27.3	32.7	28.1	32.2	33.6
Lenovo+Motorola	4.9	6.9	9.4	7.9	11.4	12.3	13.9	18.9	24.3	25.7	24.7	18.8	16.2	18.8	20.2			
LG	5.8	7.0	8.6	10.3	12.1	12.0	13.2	12.3	14.5	16.8	15.6	15.4						
Apple	26.0	26.9	47.8	37.4	31.2	33.8	51.0	43.7	35.2	39.3	74.5	61.2	47.5	48.0	74.8	51.2	40.4	45.5
Samsung	50.3	57.8	66.7	69.7	77.3	85.0	82.0	88.5	74.9	79.6	75.1	82.4	73.0	83.8	81.7	79.2	78.6	72.5

Smartwatch Vendors

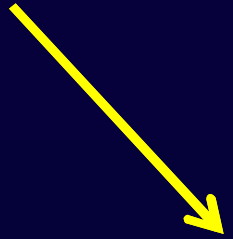
3Q'16

Units



- Apple
- Garmin
- Samsung
- Lenovo
- Pebble
- Others

3Q'15 Total
5.6 Million Units



3Q'16 Total: 2.7 Million Units

World Top 5 Smartwatch Vendors

