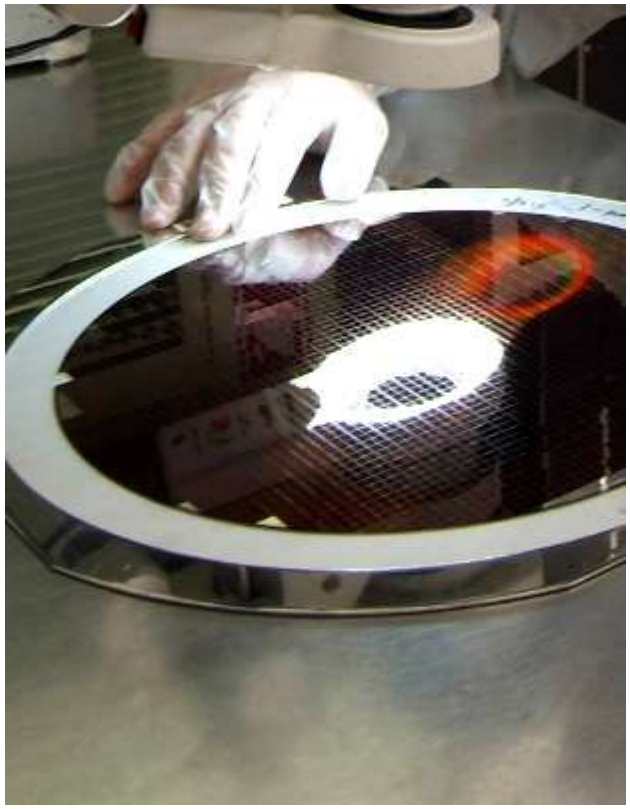
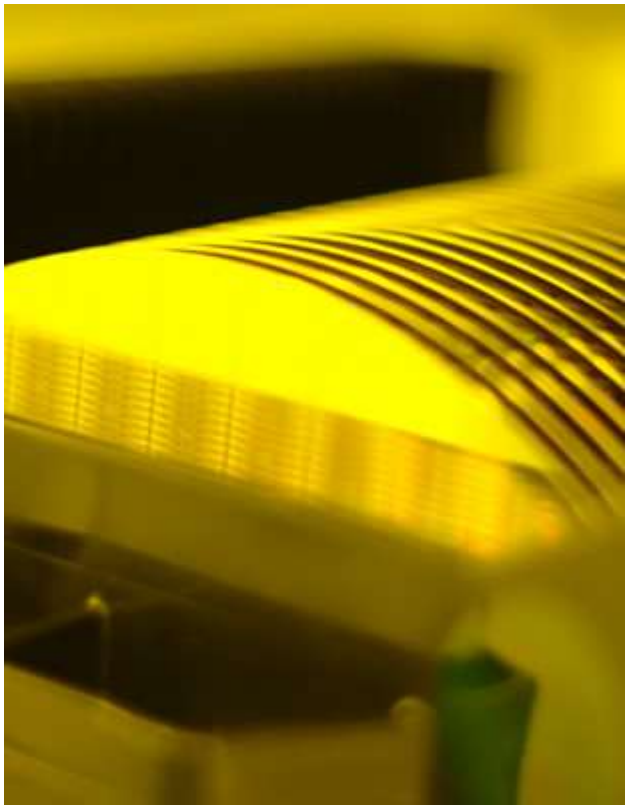




ChipMOS

Industry Leading Provider of Outsourced Semiconductor Assembly, Test & Bumping Services

3Q26 Results

November 2026

Safe Harbor Notice

- This presentation contains certain forward-looking statements. These forward-looking statements may be identified by words such as ‘believes,’ ‘expects,’ ‘anticipates,’ ‘projects,’ ‘intends,’ ‘should,’ ‘seeks,’ ‘estimates,’ ‘future’ or similar expressions or by discussion of, among other things, strategies, goals, plans or intentions. These statements may include financial projections and estimates and their underlying assumptions, statements regarding current macroeconomic conditions, including the impacts of high inflation, foreign exchange rates and risk of recession, on demand for our products, consumer confidence and financial markets generally; changes in trade regulations, policies, and agreements and the imposition of tariffs that affect our products or operations, including potential new tariffs that may be imposed and our ability to mitigate with respect to future operations, products and services, and statements regarding future performance. Actual results may differ materially in the future from those reflected in forward-looking statements contained in this document, based on a number of important factors and risks, which are more specifically identified in the Company’s most recent U.S. Securities and Exchange Commission (the “SEC”) filings. Further information regarding these risks, uncertainties and other factors are included in the Company’s most recent Annual Report on Form 20-F filed with the SEC and in its other filings with the SEC.

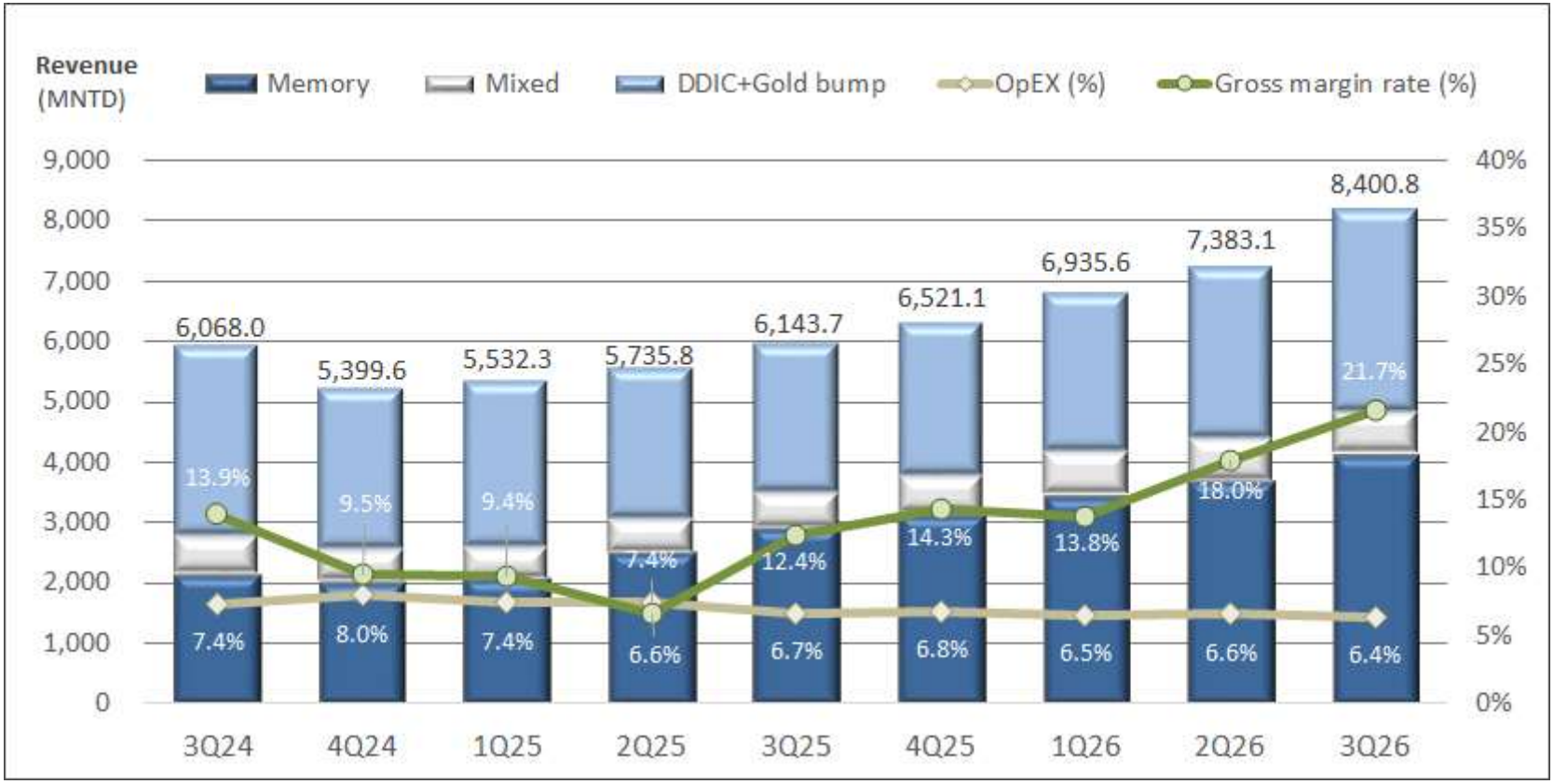
Content

- 3Q26 Operating Results
- 3Q26 Financial Results
- Business Outlook

3Q26 Operating Results

Revenue & Gross Margin

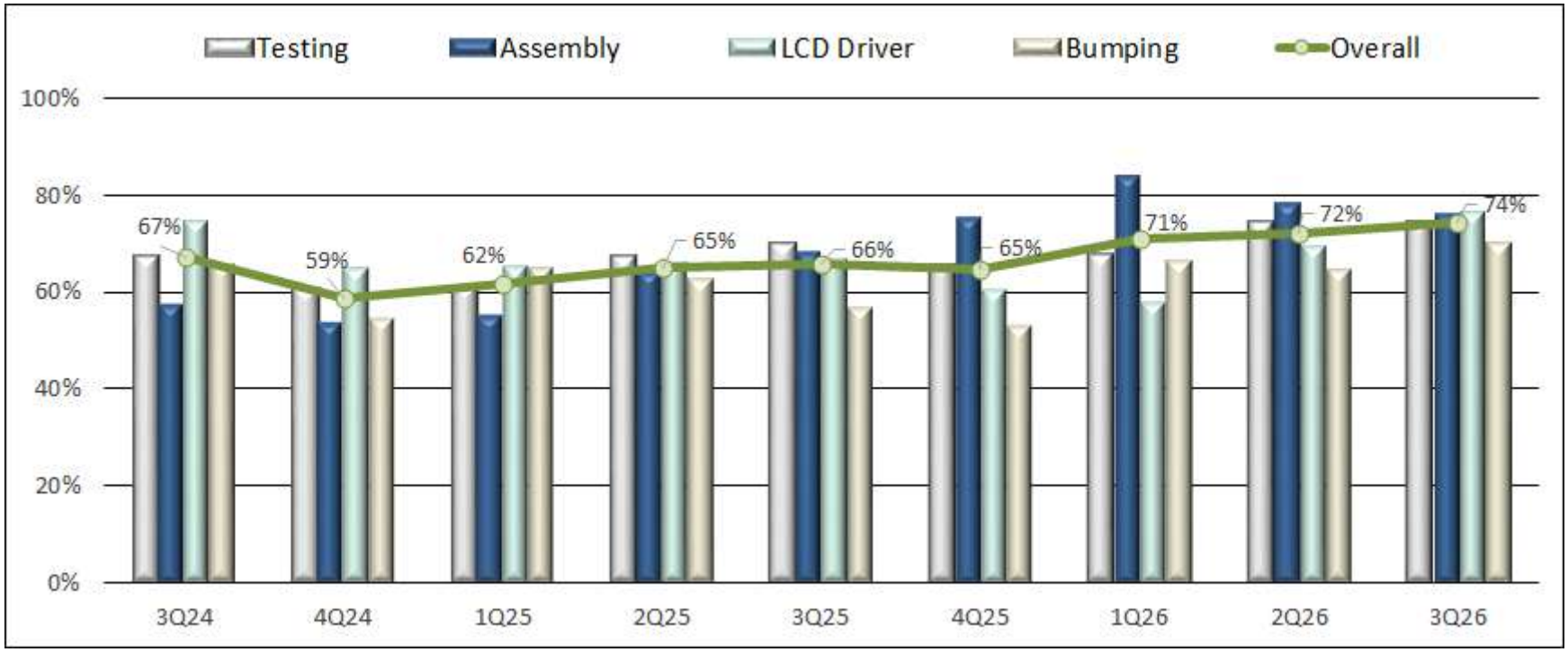
- 3Q26
  - Revenue: NT$8,400.8M (QoQ: +13.8%, YoY: +36.7%)
  - Gross Margin: 21.7% (QoQ: +3.7ppts, YoY: +9.3ppts)



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Utilization Rate

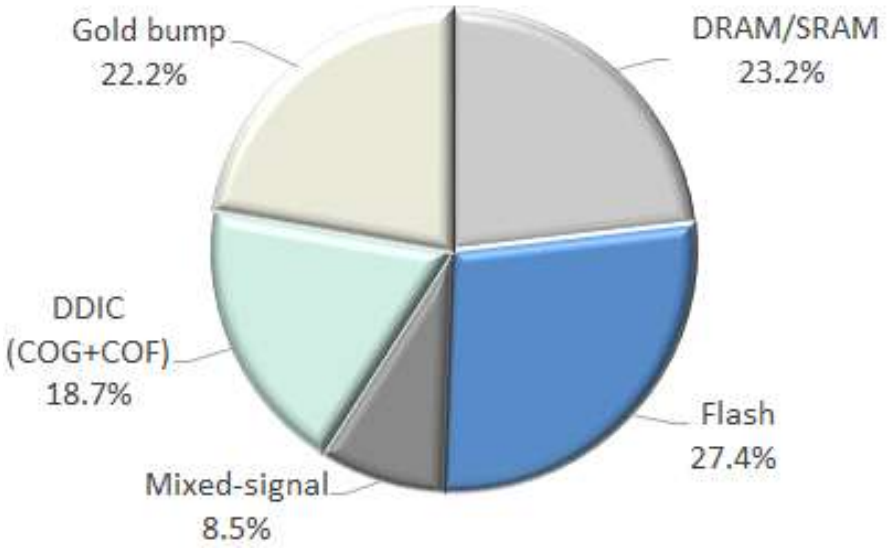
3Q26: 74% 2Q26: 74% 3Q25: 70%	3Q26: 76% 2Q26: 78% 3Q25: 68%	3Q26: 77% 2Q26: 69% 3Q25: 67%	3Q26: 70% 2Q26: 65% 3Q25: 57%	3Q26: 74% 2Q26: 72% 3Q25: 66%

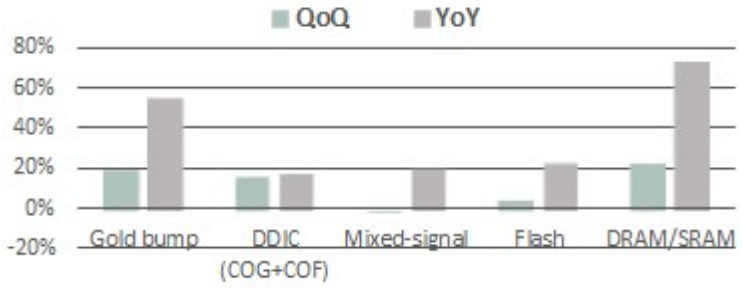


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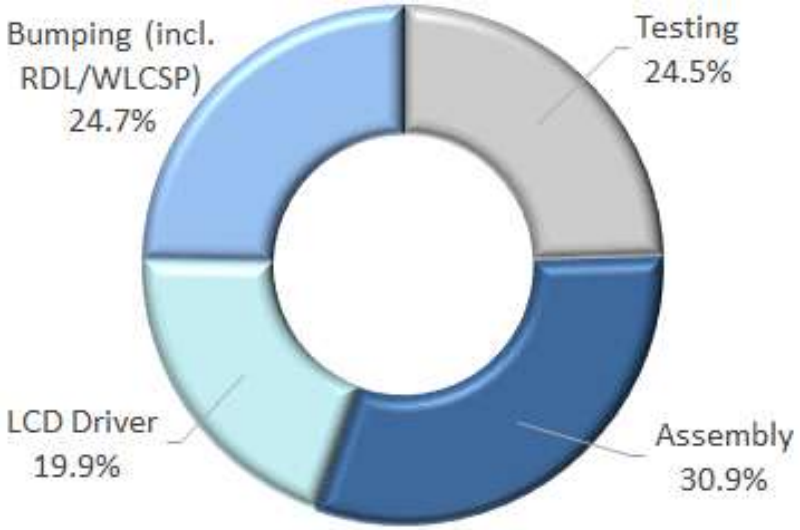
3Q26 Revenue Breakdown

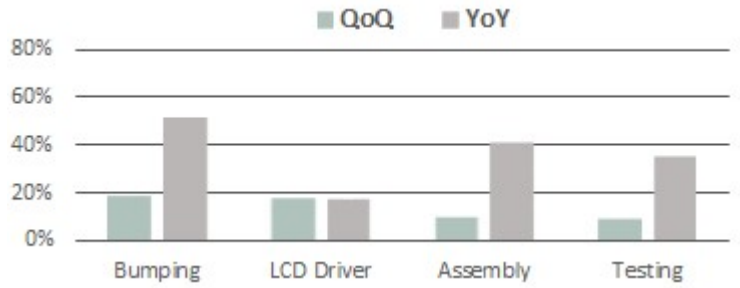
Product





Manufacturing Site

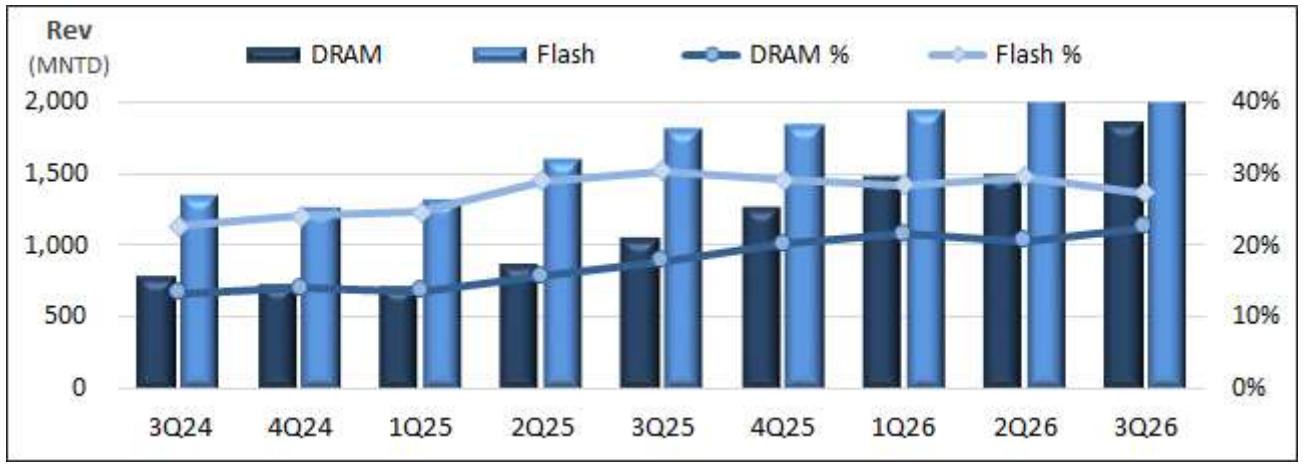




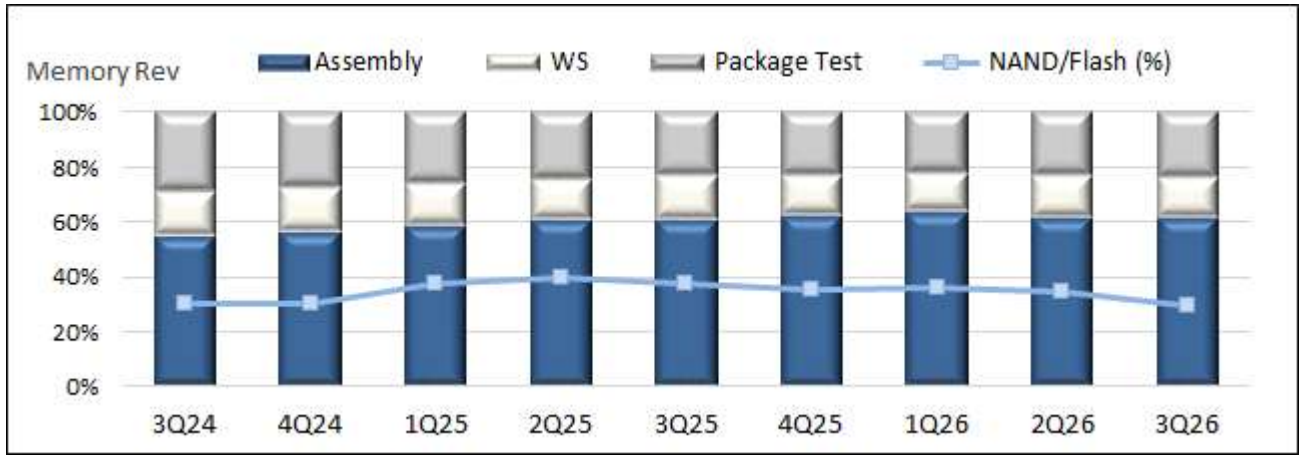
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Revenue Breakdown – Memory

☐ 3Q26: 50.6% (QoQ: +12.2%, YoY: +42.0%)



	3Q26	QoQ	YoY
DRAM	22.6%	23.9%	74.7%
Flash	27.4%	5.0%	23.5%



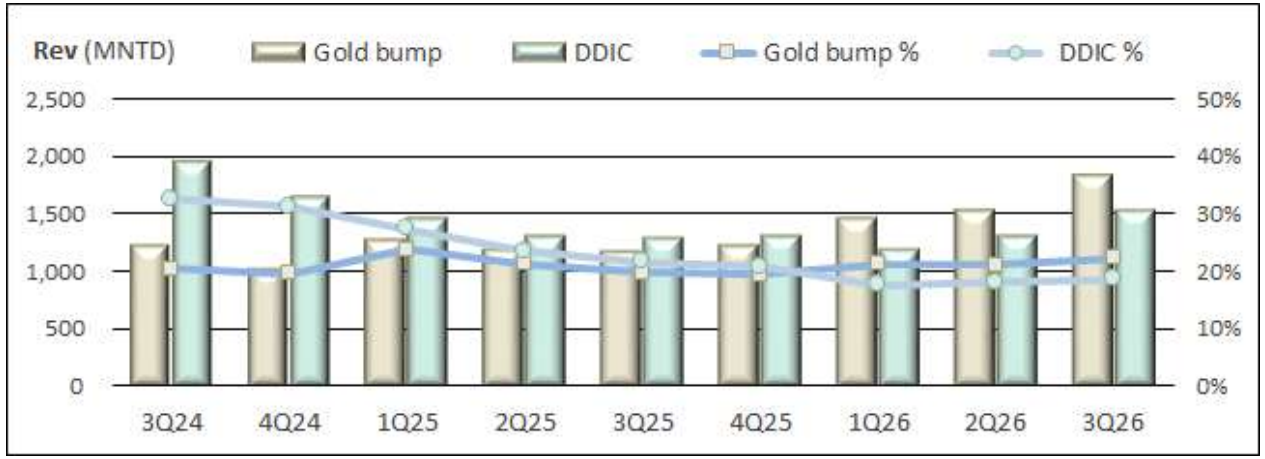
	3Q26	QoQ	YoY
NAND	29.3%*	-11.1%	-4.0%

** % of Flash revenue*

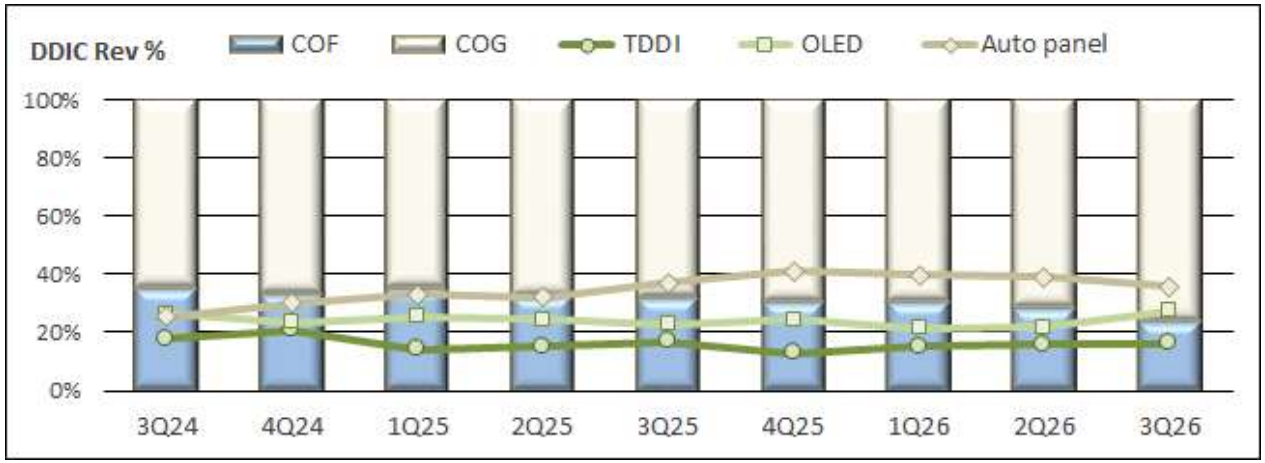
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Revenue Breakdown – DDIC + Gold Bump

☐ 3Q26: 40.9% (QoQ: +18.2%, YoY: +35.7%)



	3Q26	QoQ	YoY
Gold bump	22.2%	19.6%	54.8%
DDIC	18.7%	16.6%	18.2%



	3Q26	QoQ	YoY
TDDI	16.1%*	19.6%	13.7%
OLED	27.4%*	46.0%	41.4%
Auto panel	35.6%*	5.8%	13.7%

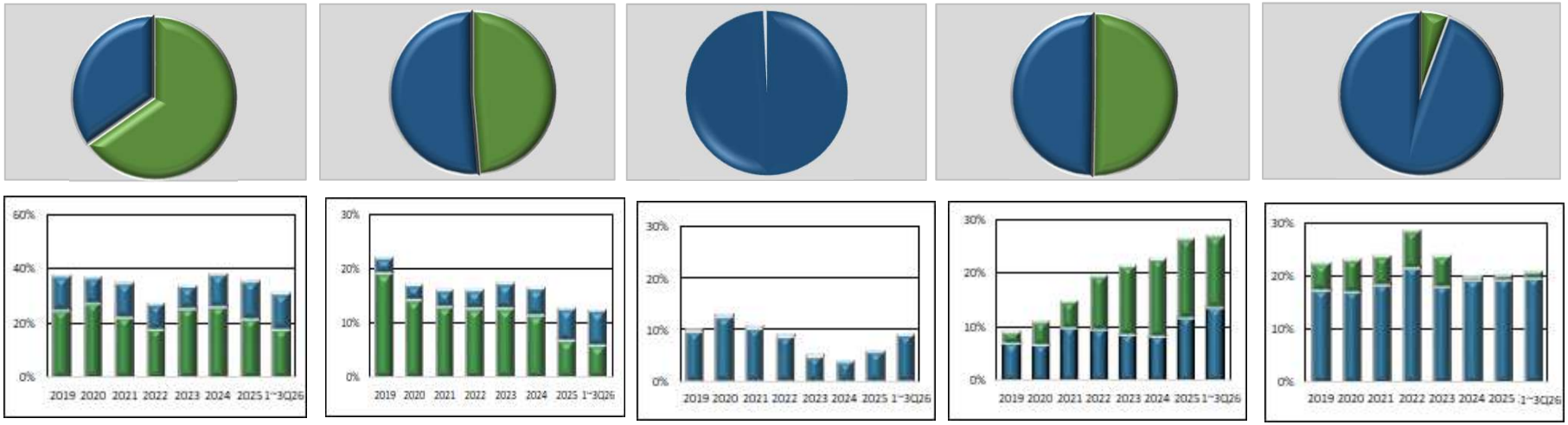
** % of DDIC revenue*

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Revenue Breakdown – End Market

Content Performance of 3Q26

Smart Mobile	TV	Computing	Auto/Industrial	Consumer
31.2%	11.1%	8.6%	27.7%	21.4%
(QoQ +18.2%)	(QoQ +0.4%)	(QoQ +52.1%)	(QoQ +8.1%)	(QoQ +9.2%)
▪ Smart phone ▪ Wearable ▪ Watch, TWS	▪ UHD/4K/8K TV ▪ OLED TV ▪ NB/Tablet	▪ PC / Server ▪ SSD	▪ In-car infotainment ▪ ADAS / sensor	▪ Game, DSC, STB ▪ Smart speaker ▪ E-paper, Internet



Note: Move “Watch” & “TWS” to “ Smart Mobile” from “Consumer” since 1Q24

3Q26 Financial Results

Consolidated Operating Results Summary

(NT$ Millions)	3Q26	2Q26	3Q25
Revenue	**8,400.8**	**7,383.1**	**6,143.7**
Profit Attributable to the Company	1,323.3	891.7	352.2
EPS Attributable to the Company - Basic (NT$)	**1.89**	**1.28**	**0.50**
Earnings per ADS equivalent - Basic (US$)(1)	1.19	0.80	0.31
Depreciation & Amortization	**1,228.4**	**1,218.1**	**1,266.5**
CapEx	1,455.4	2,380.2	796.7
Return on Equity (%)(2)	**20.8%**	**14.4%**	**6.0%**

Notes:
(1) The exchange rate was NT$31.85 against to US$1.00
(2) Annualized return on equity to the Company for the quarter

Consolidated Statements of Comprehensive Income

(NT$ Millions)	3Q26	2Q26	QoQ	3Q25	YoY
Revenue	8,400.8	7,383.1	13.8%	6,143.7	36.7%
Gross Profit	1,820.5	1,325.6	37.3%	759.7	139.6%
Gross Margin	**21.7%**	**18.0%**	**3.7ppts**	**12.4%**	**9.3ppts**
Operating Expenses	(536.6)	(486.5)	10.3%	(410.2)	30.8%
Operating Profit	1,657.3	948.0	74.8%	369.9	348.0%
Operating Profit Margin	**19.7%**	**12.8%**	**6.9ppts**	**6.0%**	**13.7ppts**
Non-operating Income (Expenses) (1)	(29.7)	78.9	-137.6%	68.5	-143.4%
Profit Attributable to the Company	1,323.3	891.7	48.4%	352.2	275.7%
EPS Attributable to the Company - Basic (NT$)	**1.89**	**1.28**	**47.7%**	**0.50**	**278.0%**
Weighted Average Shares Outstanding (in thousands) - Basic	699,983	699,983		706,736	
EPS Attributable to the Company - Diluted (NT$)	1.89	1.27	48.8%	0.50	278.0%
Weighted Average Shares Outstanding (in thousands) - Diluted	701,566	701,131		706,736	

Note (1) :
QoQ: Difference mainly due to the adverse impact on valuation of financial assets at fair value through profit or loss of NT$89M from the gain on valuation of financial assets at fair value through profit or loss of NT$78M in 2Q26 to loss on valuation of financial assets at fair value through profit or loss of NT$11M in 3Q26 and the gain on disposal of investments accounted for using equity method of NT$14M in 2Q26.
YoY: Difference mainly due to the adverse impact on foreign exchange of NT$102M from foreign exchange gains of NT$84M in 3Q25 to foreign exchange losses of NT$18M in 3Q26.

Consolidated Statements of Financial Position & Key Indices

(NT$ Millions)	3Q26 Amount	3Q26 %	2Q26 Amount	2Q26 %	3Q25 Amount	3Q25 %
Current Assets	24,277.4	53.2%	25,573.0	54.5%	23,067.2	53.7%
Non-current Assets	21,352.7	46.8%	21,391.2	45.5%	19,878.4	46.3%
Total Assets	**45,630.1**	**100.0%**	**46,964.2**	**100.0%**	**42,945.6**	**100.0%**
Current Liabilities	8,747.3	19.2%	10,716.5	22.8%	9,324.2	21.7%
Non-current Liabilities	10,765.6	23.6%	11,397.6	24.3%	10,250.2	23.9%
Total Liabilities	**19,512.9**	**42.8%**	**22,114.1**	**47.1%**	**19,574.4**	**45.6%**
Total Equity	26,117.2	57.2%	24,850.1	52.9%	23,371.2	54.4%
Total Liabilities and Equity	**45,630.1**	**100.0%**	**46,964.2**	**100.0%**	**42,945.6**	**100.0%**
Key Indices						
A/R Turnover Days	81		85		88	
Inventory Turnover Days	69		70		55	

Consolidated Statements of Cash Flows

(NT$ Millions)	1Q-3Q26	1Q-3Q25
Cash and Cash Equivalents at Beginning of Period	**14,858.9**	**15,219.0**
Net Cash Generated from (used in) Operating Activities	2,718.3	2,105.7
Net Cash Generated from (used in) Investing Activities	(4,139.2)	(2,961.7)
Net Cash Generated from (used in) Financing Activities	(3,516.4)	(1,368.5)
Effect of Exchange Rate Change on Cash	4.1	(17.5)
Cash and Cash Equivalents at End of Period	**9,925.7**	**12,977.0**
Free Cash Flow[(1)(2)]	**975.6**	**1,520.5**

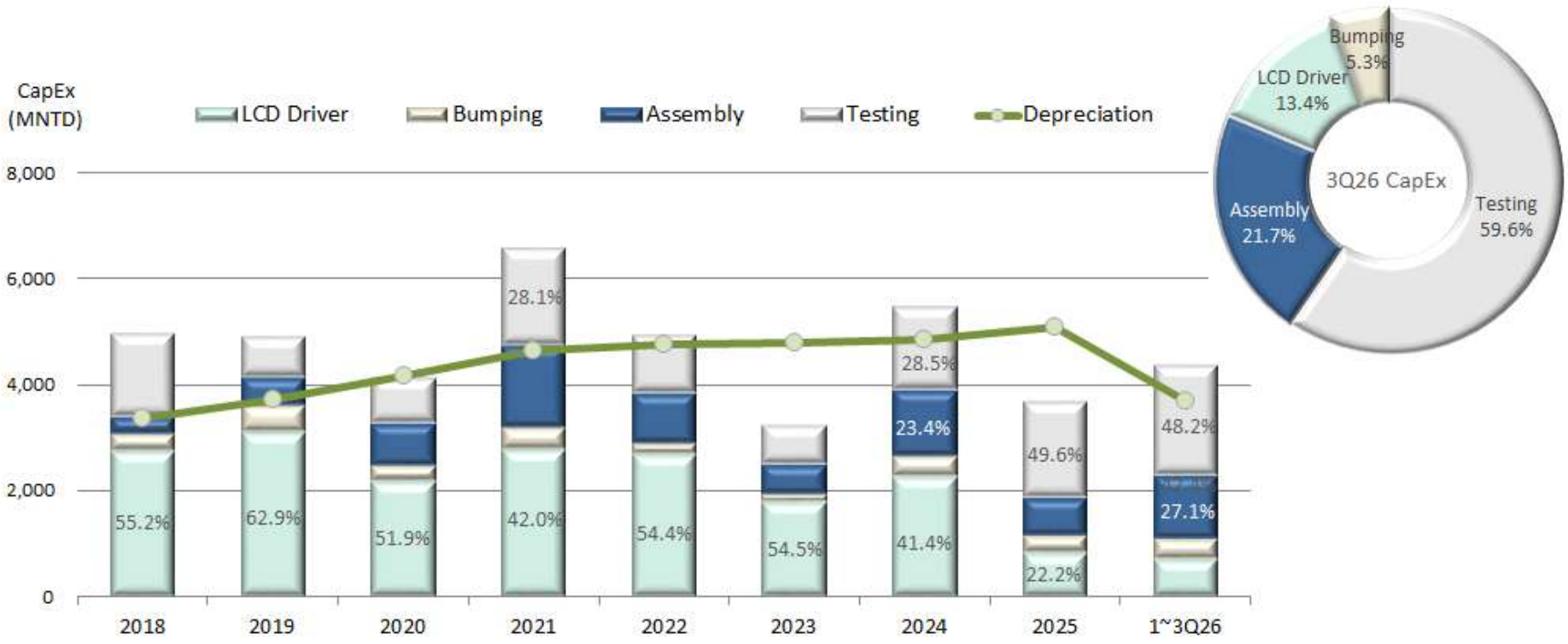
Notes :

(1) Free cash flow was calculated by adding depreciation, amortization, interest income together with operating profit and then subtracting CapEx, interest expense, income tax expense and dividend from the sum.

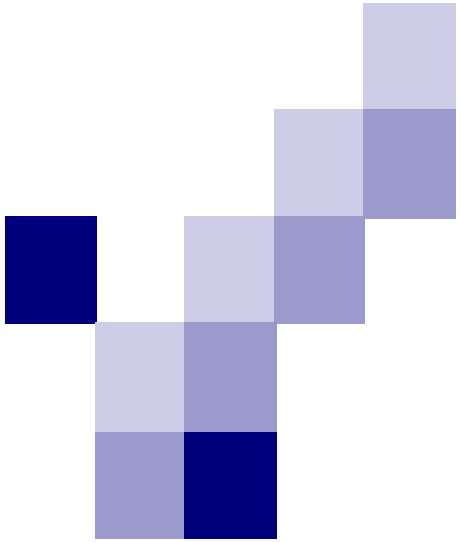
(2) Difference mainly due to the increase of CapEx of NT$2,415M, the income tax change of NT$553M from the income tax benefit of NT$20M in 1Q-3Q25 to income tax expense of NT$533M in 1Q-3Q26, the decrease of depreciation expenses of NT$163M and partially offset by the increase of operating profit of NT$2,618M.

Capital Expenditures & Depreciation

- 3Q26
  - CapEx: NT$1,455.4M
  - Depreciation: NT$1,228.4M



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Business Outlook

Market & Business Outlook

- Solid Memory demand and momentum driving revenue growth, and profitability
- Strategically focus on higher mix improvement, operating cost controls and monetizing lower UT assets
  - Memory: Momentum expected to be better than DDIC led by customers' re-stocking and solid demand
    - ✓ DRAM demand continues to exceed supply
    - ✓ Flash momentum rebound
  - DDIC: Momentum balanced led by seasonal re-stocking
    - ✓ OLED momentum benefiting from seasonal re-stocking
- Prioritizing customer program support in the rapidly expanding silicon photonics supply chain as a potentially significant long-term catalyst
- Expand Mixed-signal product portfolio to optimize product mix