FY2026 Q2
DISCO's Tidbits

November 2026

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Notes

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Important Points

- **We cannot answer questions regarding specific customers.**

  Please note that we cannot answer questions that may lead to the prediction of a specific customer’s manufacturing process, production capacity, inquiry and investment trends, confidential production information, etc.

  Each semiconductor manufacturer may have different technologies and manufacturing processes, which constitute confidential production information of each company.
  In principle, we do not provide answers regarding specific customers’ orders, equipment specifications, throughput, etc.

- **Responses regarding market conditions are to be based on the outlook at the time of the financial results announcement.**

  Revisions to market condition assessments or related comments will not be made during the applicable period (except for matters subject to timely disclosure).

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Market Situation Overview: Comparison to 3 Months Ago

- ✓ Strong equipment demand continues, mainly for generative AI.
  - Demand for memory and logic-related applications remains strong, despite fluctuations in shipment timing.
  - Demand is expanding into a wider range of applications, such as CPO and power semiconductors.
  - Equipment demand remains steady across a wide range of customers, including OSATs.
- ✓ Consumable shipments remain stronger than expected.
  - Shipments increased for PCs, smartphones, and power semiconductors, in addition to high-value-added products for generative AI.
  - We will closely monitor trends in consumable shipments as well as end demand.
- ✓ Steadily strengthening production capacity to support strong demand.
  - Equipment shipment volumes are also trending upward, mainly for dicers, in addition to high-value-added products.
  - Production capacity is being strengthened through the expansion of manufacturing support and ongoing efforts to reduce workload and improve productivity.
- ✓ Closely monitoring when advanced packaging technologies will transition to full-scale mass production.
- ✓ The impact of the procurement environment and rising costs of components and raw materials is limited at this time.

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Composition Ratio of All Equipment (Shipment Basis)

Composition ratio of all equipment (Shipment Basis) (Actual) (Forecast)

		FY25				FY26		
		Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
Customer	OSAT	30%	Slightly less than 30%	Slightly less than 30%	Slightly more than 30%	35%	Slightly more than 30%	30%
Application	Memory *	Slightly more than 40%	Slightly less than 40%	Slightly less than 20%	Slightly less than 30%	35%	35%	30%
	Power	Slightly less than 10%	Slightly less than 10%	Slightly more than 10%	Slightly less than 10%	Slightly less than 10%	Slightly less than 10%	Slightly less than 10%

* Including generative AI related

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Perspective on GPM and SG&A

Outlook for the October-December quarter

- **GPM** Formulated based on QoQ decrease of approx. 2.0 points.
  (assumed exchange rate: USD/JPY 151)
  For equipment, profit projections are based on past trends, and detailed projections are not calculated for individual projects.
  Actual profitability is expected to vary depending on the product and application.

- **SG&A** The plan assumes approximately flat performance QoQ.
  Perspective on SG&A
  1. The majority of SG&A is personnel expenses (including personnel expenses in R&D costs).
  2. Fluctuates significantly due to provision for bonuses linked to business performance.
  3. As it is mainly linked to the shipment amount, it may fluctuate on a quarterly basis.

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R&D/CAPEX Forecast

F26 Forecast:

■ CAPEX

Approx. 33.0 billion yen Continued expenditures due to facility expansion are expected.

(No change from the previous forecast)

Reference: Plans to Construct Gohara Plant as Part of Hiroshima Works (2025/4/18)

■ DEP

Approx. 16.0 billion yen

(No change from the previous forecast)

■ R&D

Approx. 38.0 billion yen Proactive engagement in R&D will continue.

(No change from the previous forecast)

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To Investors Considering Purchasing DISCO Shares

DISCO believes that striving to increase our Mission-achievability connects to an increase in our Value-exchangeability and competitiveness, enabling us to respond to the expectations of all capital-market stakeholders.

- ✓ Pursuing Quality of Business
- ✓ Utilization of Tangible Net Worth and Purpose
- ✓ Shareholder Return Policy
- ✓ Action to Implement Management that is Conscious of Cost of Capital and Stock Price

Click here for more details on our policy regarding the above.

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Notation
The yearly accounting period from April of the current year to March of the following year is denoted by FY (Fiscal Year), and quarterly accounting periods are denoted by 1Q (April – June), 2Q (July – September), 3Q (October – December), and 4Q (January – March). Depending on the monetary unit, figures lower than the minimum unit may be rounded up or down, as a result of which the total sum may not match.
Percentages are calculated based on the actual figures.

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