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ELAN Monthly Sales Report – January 2025

ELAN Microelectronics Corp. (the Company), a leading touch controller solution provider in global NB market, announced its consolidated net sales of NT\$ 1,043 million for January 2025. Despite the traditional slow season, the company benefited from increased orders as customers anticipate the imposition of additional tariffs. Revenue grew 7.38% MoM and 4.64% YoY. We are fully committed to planning the production schedule in advance to meet the orders.

Sales for January 2025 --YoY Comparison

Unit: NT\$ Thousand

Year	2025	2024	YoY
Net Sales (Consolidated)	1,043,107	996,881	4.64%

The sales breakdown in January 2025: Touchpad Module 48%, Touchscreen Controller 26%, Fingerprint Sensor 11%, Pointstick (PST) 11%, Microcontroller 3%, and 1% from the sales of affiliates. Touch applications, including biometric applications, accounted for 85% and non-touch applications accounted for 15%.

Although macroeconomic uncertainty continues to have an impact in 1Q25, supply chain inventory levels have returned to normal, which will help strengthen visibility into restocking momentum in the long term. In the short term, to mitigate the risks associated with tariff policies, customers have been stocking up in advance, leading to an inflow of NB related orders.

In alignment with the market expansion of AI applications, the company is actively collaborating and promoting AI features for application in new models, preparing to embrace the coming AI PC era. The replacement cycle following Microsoft Windows10 stop supporting update is bound to drive the trend of equipping devices with cybersecurity management features, such as Fingerprint Sensor, to protect organizational data and assets from hacker threats. We are working closely with customers to expand in the AI market, striving to create

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Looking ahead to the NB market in 2025, we anticipate a NB replacement cycle due to 1) Microsoft's Windows 10 will no longer receive support updates or free software updates, starting in 2025'Q4, and 2) a well-prepared AI PC supply chain. In fact, such replacement cycle already started in the Japanese market in 2024, and the growth trend of the demand is expected to continue. General market research institutions view the market positively, predict moderate market growth. With this, we are confident in driving an increase in operational efficiency.

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