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ELAN Monthly Sales Report – September 2025

ELAN Microelectronics Corp. (the Company), a leading touch controller solution provider in global NB market, announced its consolidated net sales of NT\$ 1,133 million for September 2025. Sales increased 1.7% YoY, decreased 3.2% MoM.

3Q25 benefited from a rebound in end-market demand, with stronger pull-in momentum and an increase in short orders. Although overall market demand remains moderated compared with previous years due to uncertainties in tariff policies, signs of recovery are gradually emerging. The Company continues to strengthen the relationship with customers and adjust strategies flexibly to ensure stable supply.

Sales for September 2025 --YoY Comparison

Unit: NT\$ Thousand

Year	2025	2024	YoY
Net Sales (Consolidated)	1,133,440	1,114,868	1.67%

The sales breakdown for September 2025: Touchpad Module 49%, Touchscreen Controller 18%, Fingerprint Sensor 13%, Pointstick (PST) 16%, Microcontroller 2%, and 2% from the sales of affiliates. Touch applications, including biometric applications, accounted for 80% and non-touch applications accounted for 20%.

In 3Q25, the consumer electronics industry entered its traditional hot season. Although changes in tariff policies continue to pose macroeconomic uncertainties, overall orders and shipments have remained stable, supported by inventory levels returning to a healthy range. In the short term, customers remain conservative due to macroeconomic uncertainties. The Company is flexibly adjusting shipment pacing and aligning production planning to accommodate potential short orders. The Company remains confident in the replacement cycle, with commercial models expected to benefit first, and the proportion of commercial models in our product mix continues to increase steadily.



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Additionally, the Company is actively collaborating with customers to expand AI applications, integrating AI features into new product lines and jointly planning the development of future AI PCs. The Company maintains a positive long-term outlook for the NB industry and will continue strengthening partnerships with its customers, leading a win-win situation.

Impacted by tariff policies and geopolitical risk, NB market in 2025 faces numerous challenges. Nevertheless, brand customers and the company remain committed to advancing AI PC development in response to evolving technologies and future trends. As the penetration rate of AI PCs continues to rise, we are confident that the Company's operations will grow accordingly. By incorporating more AI features, we aim to capture the growth opportunities brought by Edge AI together with our customers.

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