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ELAN Monthly Sales Report – July 2026

ELAN Microelectronics Corp. (the Company), specializing in Edge AI and On-Device AI technologies, announced its consolidated net sales of NT\$ 878 million for July 2026. Sales decreased by 13.21% YoY and 17.09% MoM.

2Q is traditional peak season for consumer electronics, while tightness in the upstream supply chain has led to supply gaps for specific components, impacting some of our product lines. As a result, brand customers have remained cautious in their marketing and procurement strategies, while adopting more flexible approaches to component inventory and cultivating multiple resources. The Company closely monitored customers' inventory levels and adjusted production planning in a timely manner to respond flexibly to demand. Looking ahead, based on customers' current marketing strategies, shipment volumes are expected to remain constrained due to raw material shortages; However, the Company expects its brand customers to address the current shortage of raw materials through more flexible supply chain arrangements, allowing them to mitigate the impact and resolve the issue as quickly as possible.

Nevertheless, the Company has officially begun shipments of its AI image recognition algorithm products since 3Q25, successfully expanding applications into drones and various image recognition fields. Diversified products have driven revenue to remain stable compared with peers and exceed the Company's original expectations. The Company continues to strengthen the relationship with customers and adjust strategies flexibly to ensure stable supply.

Sales for July 2026 --YoY Comparison

Unit: NT\$ Thousand

Year	2026	2025	YoY
Net Sales (Consolidated)	878,267	1,011,978	-13.21%

The sales breakdown for July 2026: Touchpad Module 45%, Touchscreen Controller 14%, Fingerprint Sensor 14%, Pointstick (PST) 11%, AI 13%, and 3% from the sales of Microcontroller and affiliates. Touch applications, including biometric applications, accounted

<<ELAN is one of the globally recognized leaders in Edge AI and On-Device AI technologies, with strong expertise in the development of AI image recognition algorithms and the delivery of comprehensive, integrated AI solutions. For more information, please go to <https://www.emc.com.tw/emc/en>>>



for 73%, non-touch applications accounted for 14% and AI accounted for 13%.

Entering the Q2 peak season, the industry faces component imbalances due to robust AI server demand. However, End -products shipments demand from customers remains intact. Customer inventories are at healthy levels, and procurement momentum continues to show resilience.

In the short term, customers have maintained a high flexibility in their sales and inventory strategies in response to the macroeconomic. The Company has aligned with customers' production requirements, enabling it to respond effectively to potential short orders. Although market uncertainties persist, the Company remains cautiously optimistic about enterprise replacement demand and the development of AI PCs. Commercial models are expected to benefit first, with the proportion of related products continuing to increase steadily.

Looking ahead to 2026, NB market is expected to continue facing multiple challenges amid the impact of components shortage and geopolitical factors. Nevertheless, both the Company and its brand customers share a strong consensus on the long-term development of AI PCs and will continue to invest in relevant technologies and product roadmaps to address future technological evolution and industry trends, while jointly capturing growth opportunities driven by edge computing.

Furthermore, the Company continues to leverage its core technological strengths in AI image recognition algorithms to expand into diversified application areas, including automotive ADAS, smart cockpits, AI CCTV, drones, robotics, and autonomous vehicles. These initiatives support a more diversified operational layout and are expected to inject long-term, stable growth momentum into the Company's overall operations.

Overall, the Company maintains a positive long-term outlook on the growth prospects of AI image recognition and the NB industry. It will continue to deepen strategic partnerships with key customers, respond flexibly to market changes, and work collaboratively to enhance overall market competitiveness and achieve sustainable, long-term value creation.



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