

華碩電腦

2016年第3季投資人說明會

問與答

Arthur Hsieh, UBS-Analyst

- Can you share the sales contribution and profitability from gaming PC and ZenBook?
- If the gaming industry is growing at 30%, and we are growing at 60%, whom are we taking shares from?
- Can you comment on the growth of gaming market for next year?
- What's the profitability contribution from gaming? Can it offset more than the declines from the other segments?
- 4Q OPM, where is the improvement coming from?
- What's your expectation from Zenbo? What's the synergy? In regards to deep-learning, is this a value-added from ASUS or partnership with others?
- Any plans with the excess cash?

Wei Chen, Goldman Sachs-Analyst

- Can you share the roadmap and the timeline you have planned for VR/AR products? ASUS' positioning here?
- How about the profitability on these?
- Can you comment on your view on the overall PC market for 2017 or 2018 and the changes on the ASP trends?
- With already accumulated cash position, are you considering anything to enhance values for investors? Investments in M&A?

Robert Cheng, Merrill Lynch-Analyst

- What's the smartphone shipment for 3Q and shipment guidance for 4Q? And your views for 2017 expectations?
- Give us an idea on the overall 2016 smartphone shipment? Any expectations you may have for the next year?
- What's your thought on the new business model on AR?

Arthur Liao, Fubon-Analyst

- Previous goal for mobile is having mobile revenue to exceed PC revenue. How do you view this for the next two years?
- In the next 2~3 years, can we assume that the Company is a potential smartphone vendor?

Webcast users

- Winnie Tao, Citi-RA: Can you share your views of the regional PC channel inventory?
- Angela Hsiang, KGI-Analyst: Any thoughts on the opportunities from commercial PC? Do you see potential growth from the consumer PC market?