華碩電腦

2018年第4季投資人說明會

IN SEARCH OF INCREDIBLE

問與答

1. Can you quantify the impact of graphic card on 2018 operating margin? What is the situation of graphic card inventories and the write-off plan in 1H 2019?

2. What is Asus's strategy on strengthening the PC products and reversing the decline trend in market share? What's the KPI for new management team?

3. How will the ROG phone be classified in the future? What is the profitability of the ROG business currently?

4. When do you expect CPU shortage to resolve? Can you give us more details on your gaming business in 2019?

5. Could you please elaborate the margin impact from component price decline this year?

6. Why do you intend to keep 2 models in handset business? Without the scale, how do you intend to turn the business profitable?

7. Can you give us more colors on the initiatives of AIOT business and products?

8. How is the demand outlook for nVidia new product?

9. Will Asus engage with the Cloud VR ecosystem announced by Qualcomm? What is the opportunity in that? How do you view the impact of 5G on PC/NB?

10. What is the profitability outlook for Askey in 2019?

11. Will the Zenfone mobile phone be launched in the future? What is the timeline for mobile phone transformation?

12. What is the dividend policy in 2019? Will you consider higher dividend payout for shareholders?

13. Qualcomm and Asus launched the SOC mobile phone in Brazil which is not consistent with the positioning of gamers and power users. Can you explain the purpose and benefit of the cooperation?

14. When can we see the gaming phone start to make profits or at least breakeven?

15. What percentage of Asus NB/PC is AMD-based? Is the AMD share going to increase this year? What is the percentage?