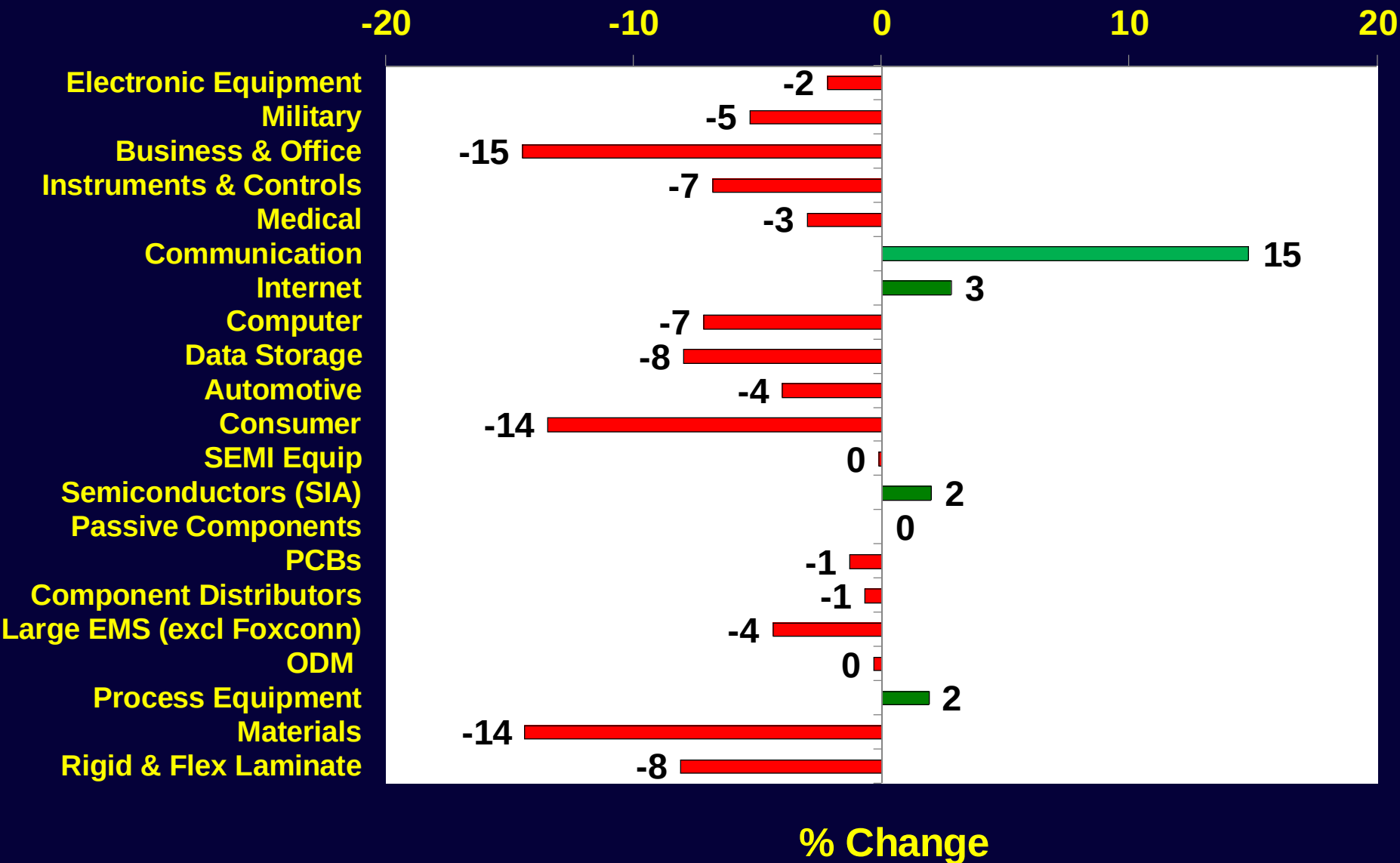


Global Electronic Supply Chain Growth 2Q'15 vs. 2Q'14



US\$ equivalent at fluctuating exchange; based upon industry composites including acquisitions

Chart 2

Global "Purchasing Managers" Index

Diffusion Index, >50 = Growth

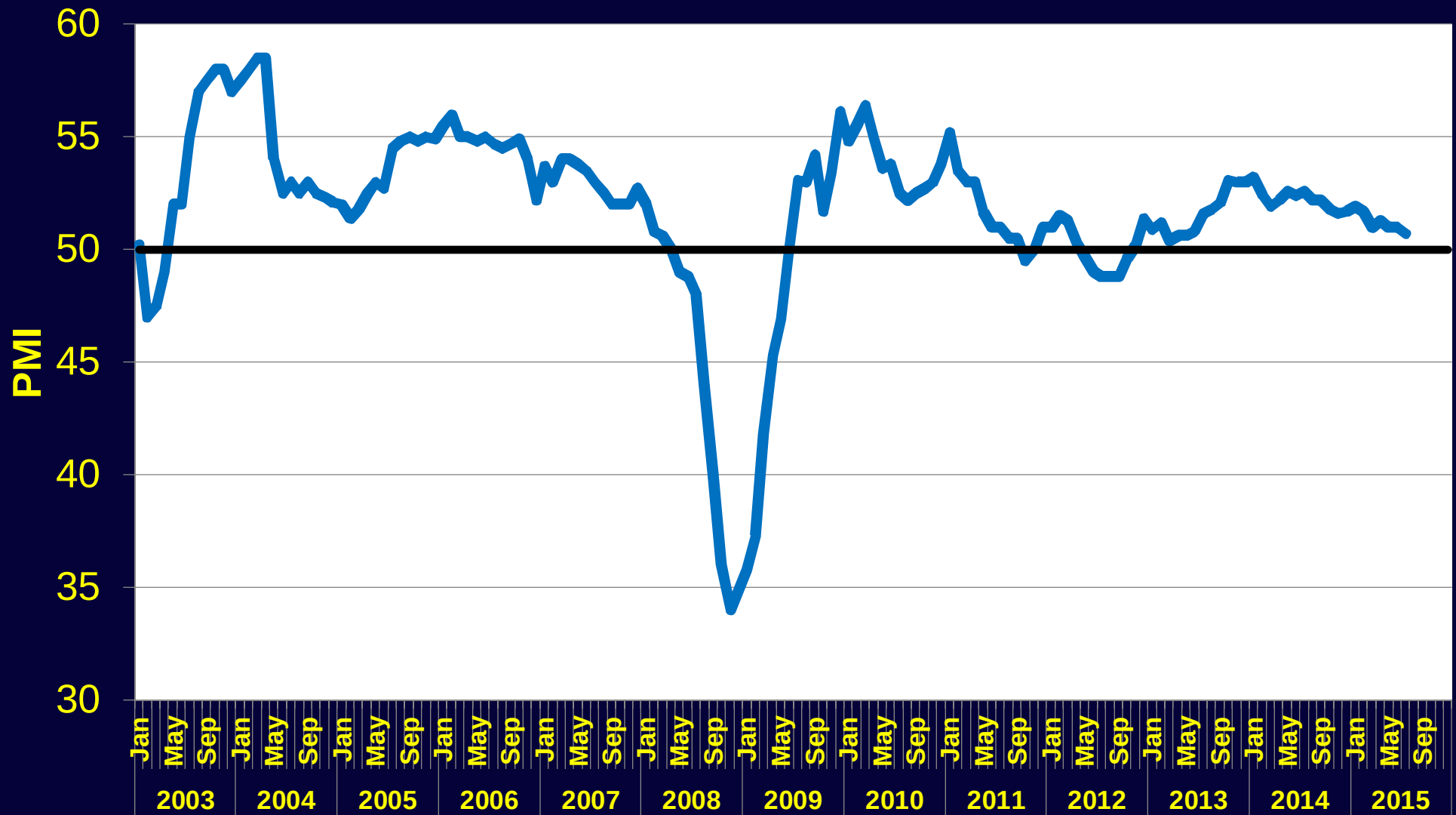
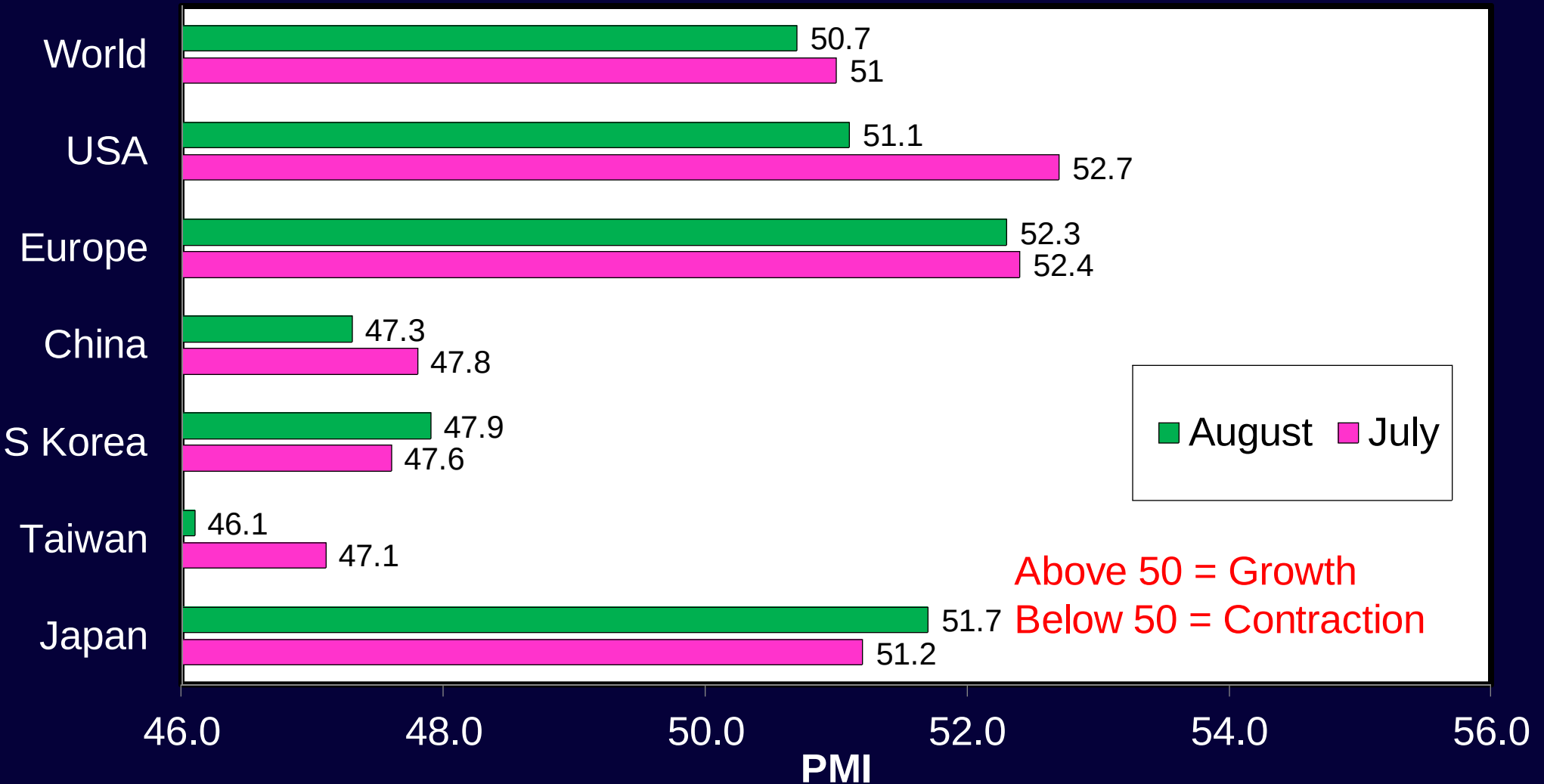


Chart 3

Purchasing Managers' Indices August vs. July 2015



Markit Economics, JPMorgan and ISM

U.S. "Purchasing Managers" Indices

ISM vs. Markit Economics

Diffusion Index, >50 = Growth

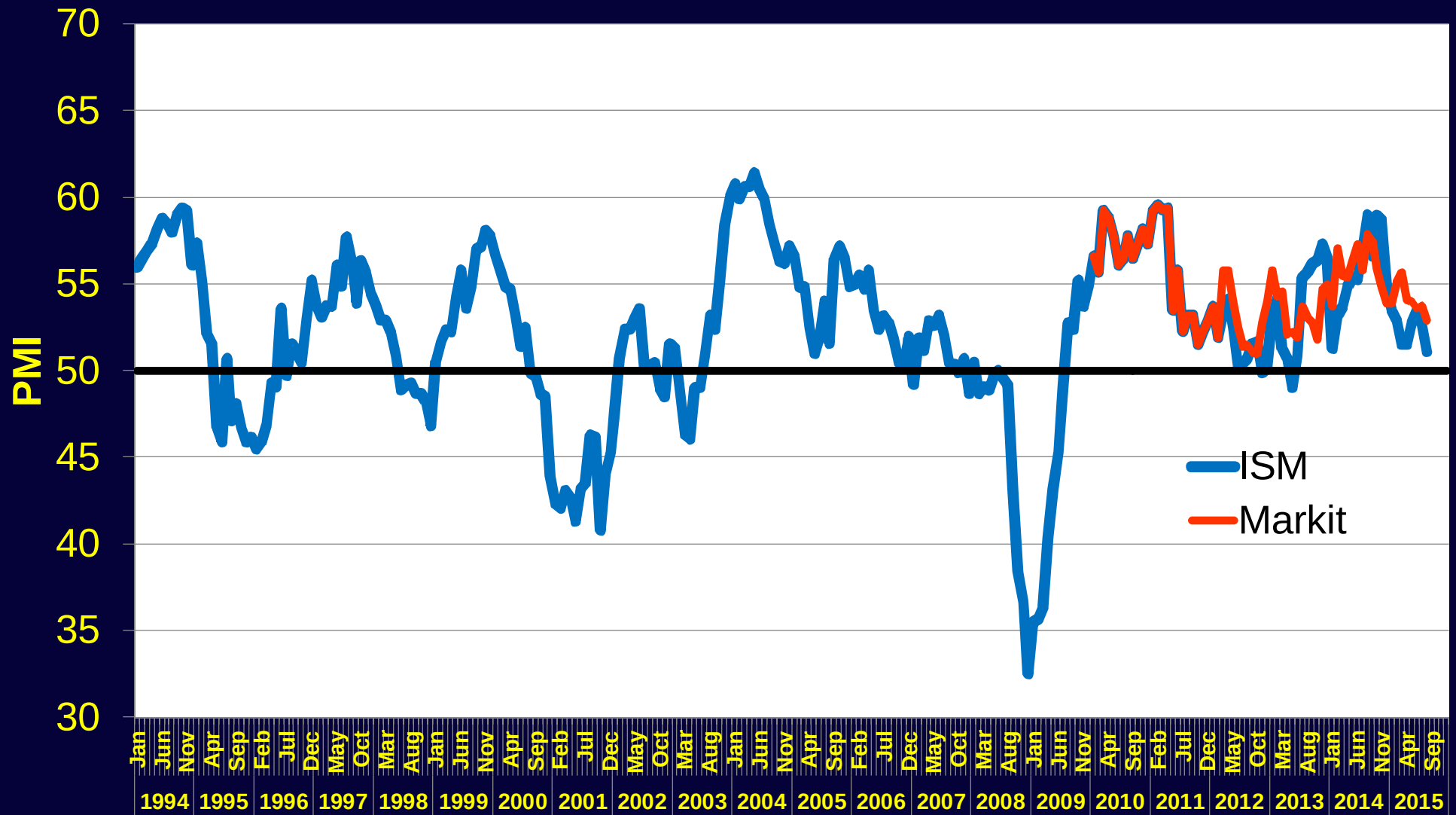
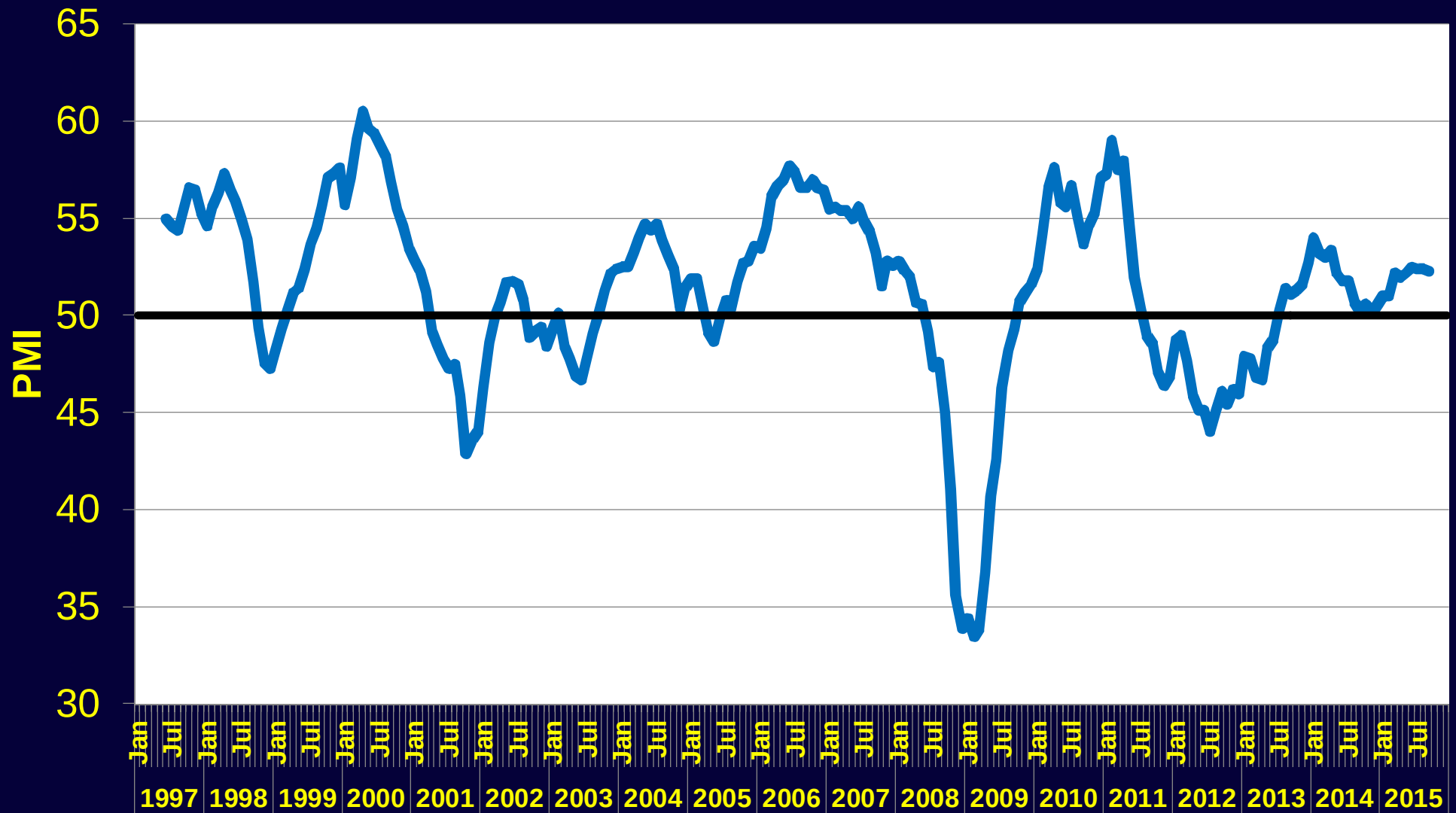


Chart 5

Eurozone "Purchasing Managers" Index

Diffusion Index, >50 = Growth



European Purchasing Managers' Indices August vs. July 2015

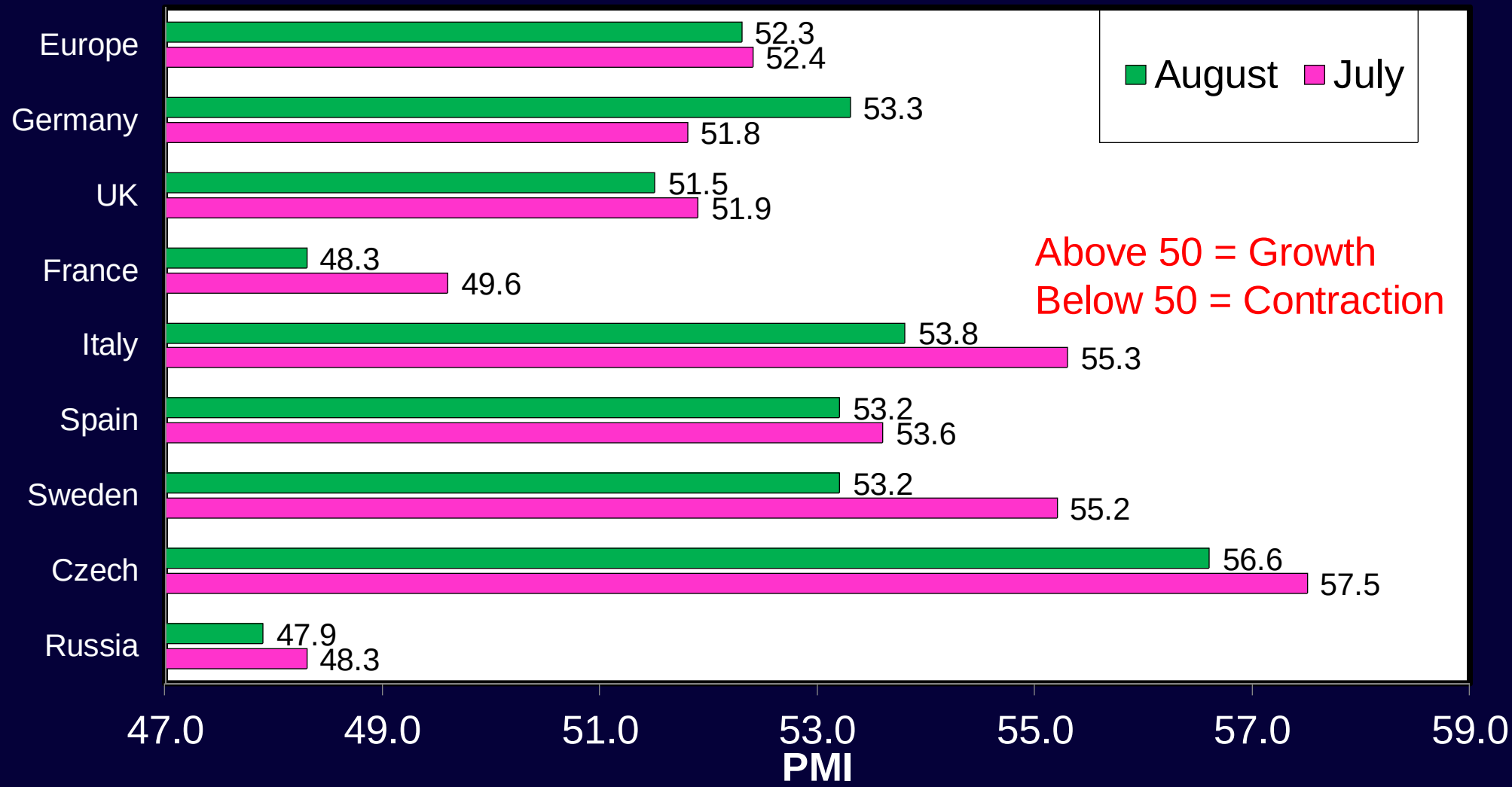
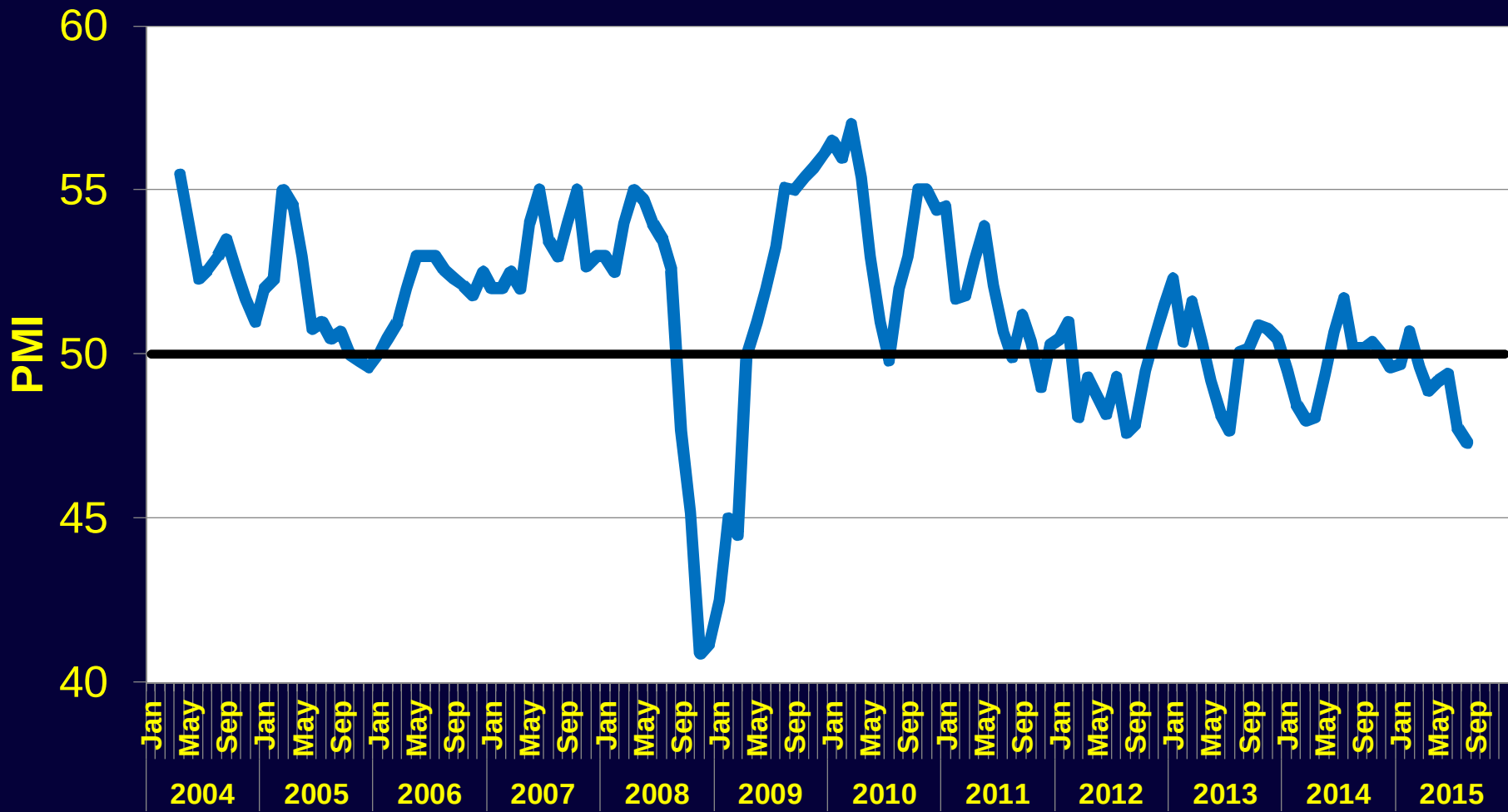


Chart 7

China "Purchasing Managers" Index

Diffusion Index, >50 = Growth



Taiwan "Purchasing Managers" Index

Diffusion Index, >50 = Growth

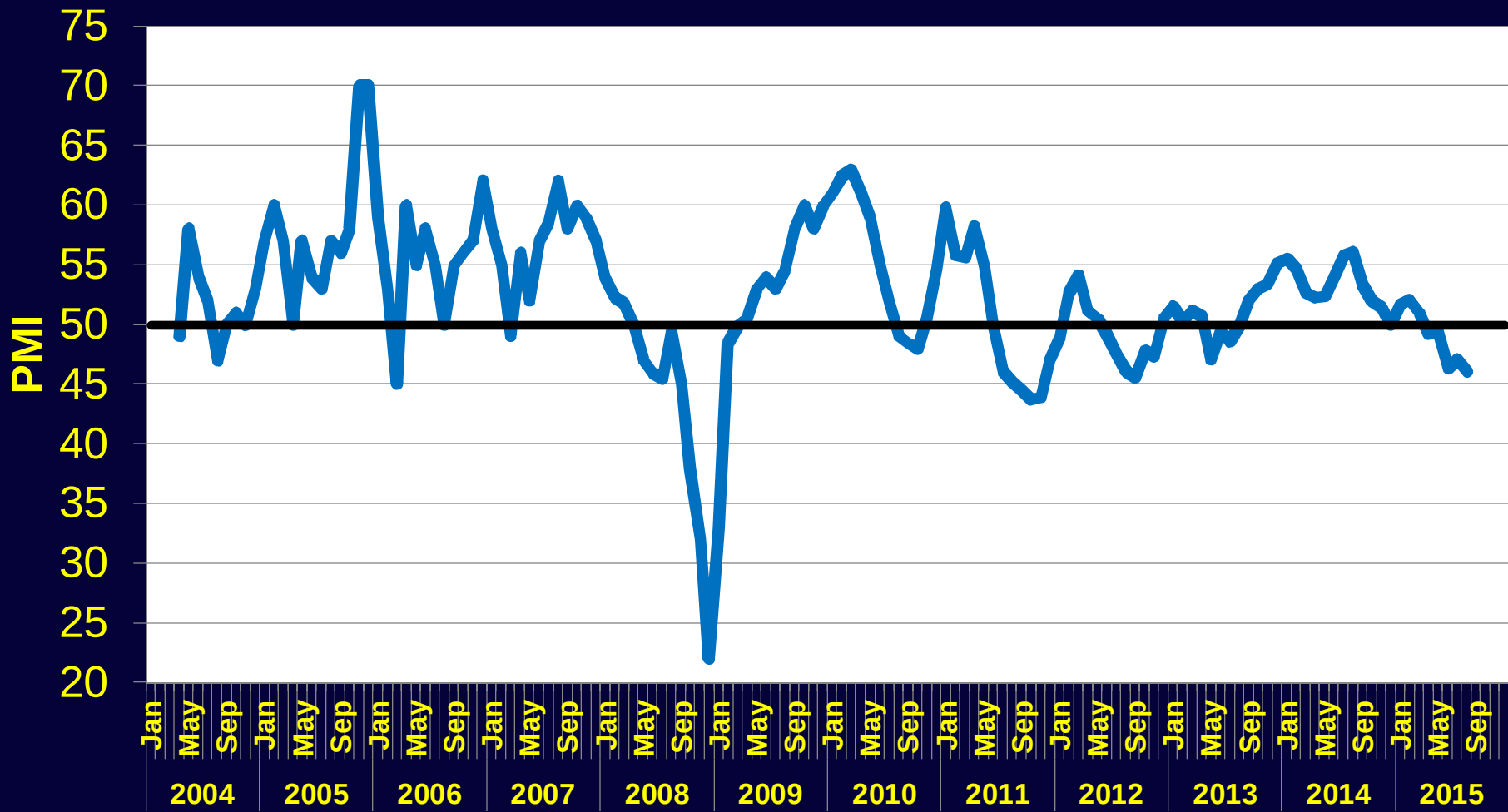


Chart 9

S Korea "Purchasing Managers" Index

Diffusion Index, >50 = Growth

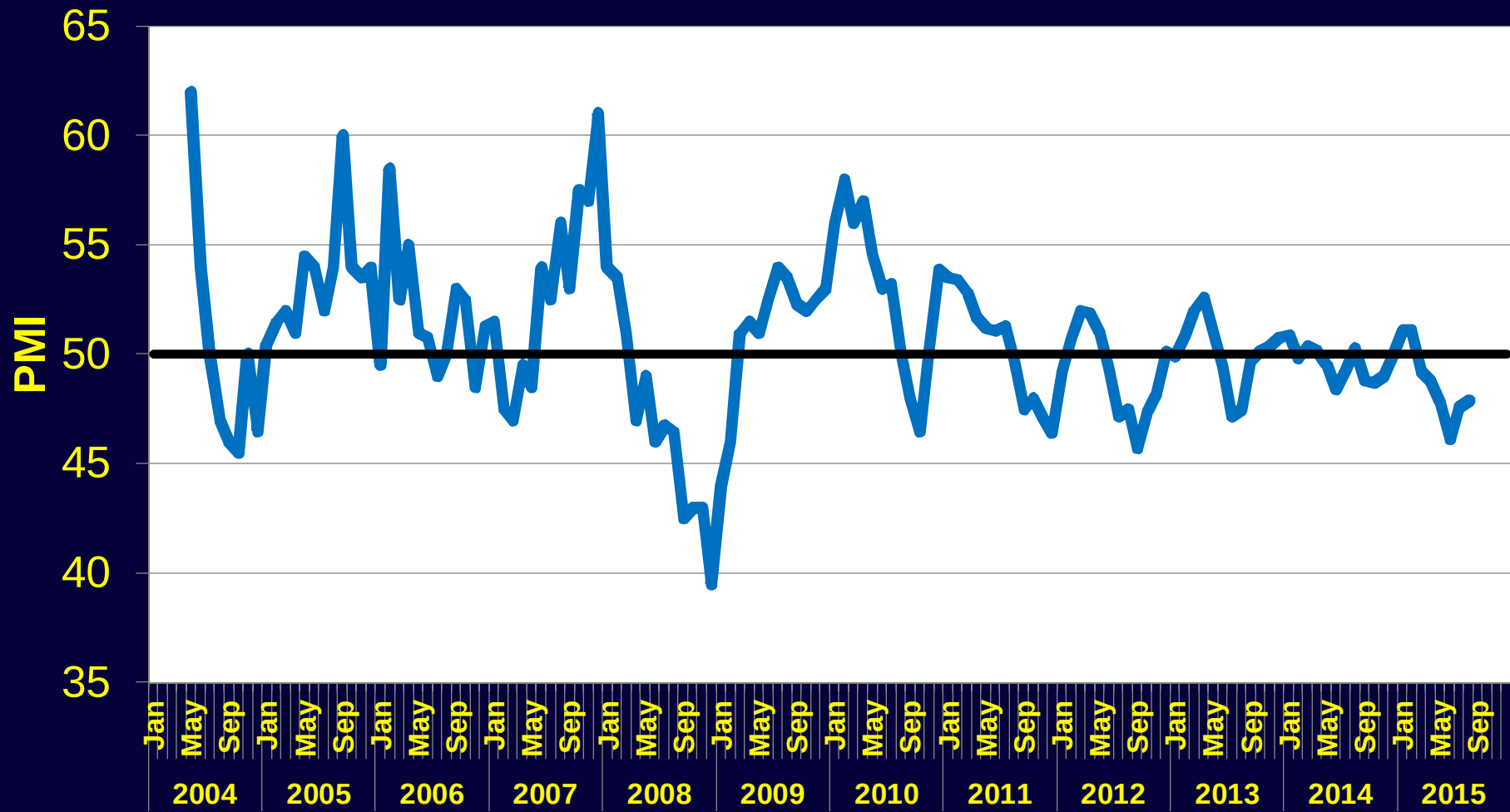


Chart 10

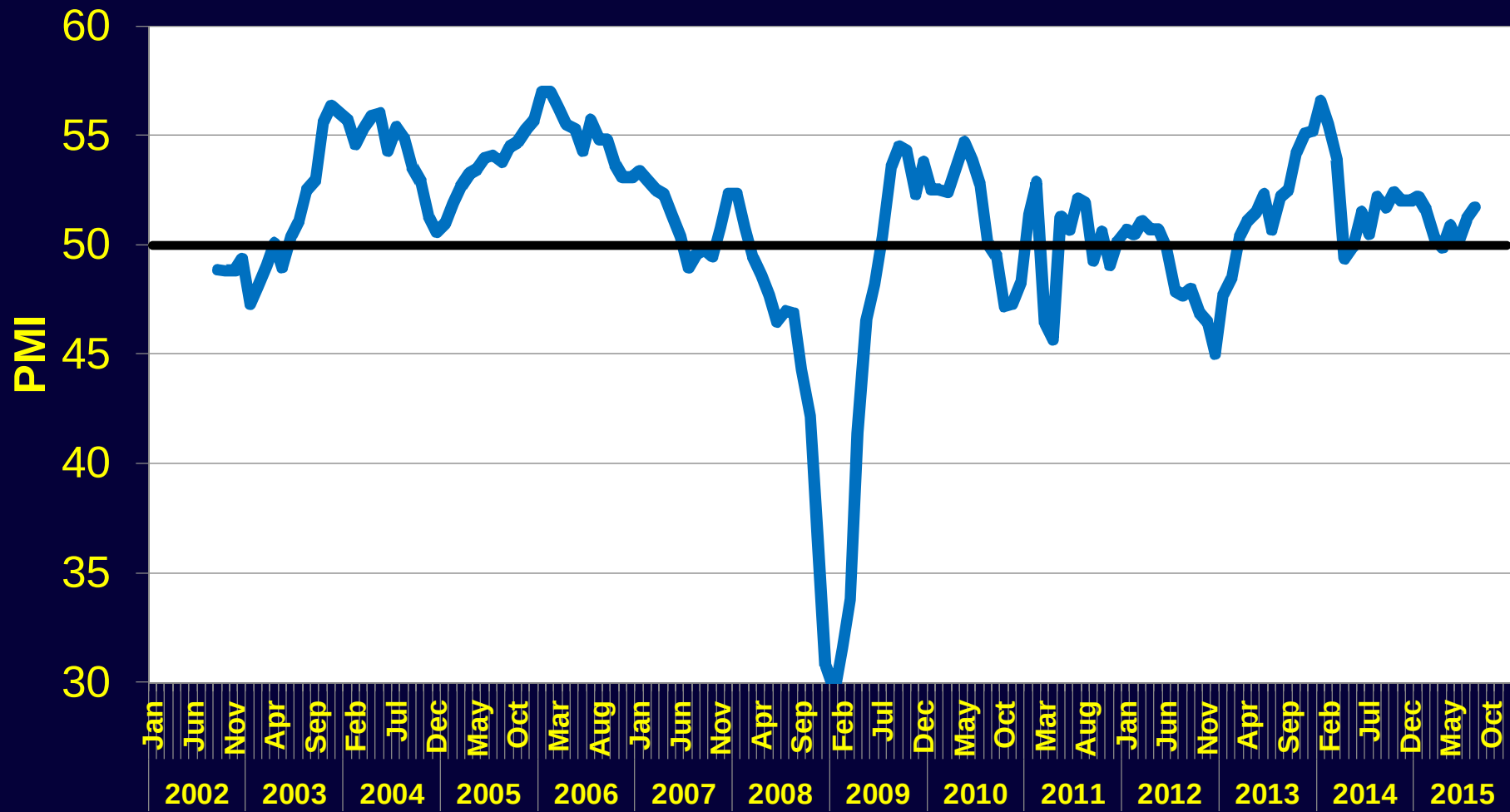


Chart 11

Asian Purchasing Managers' Indices June vs. July 2015

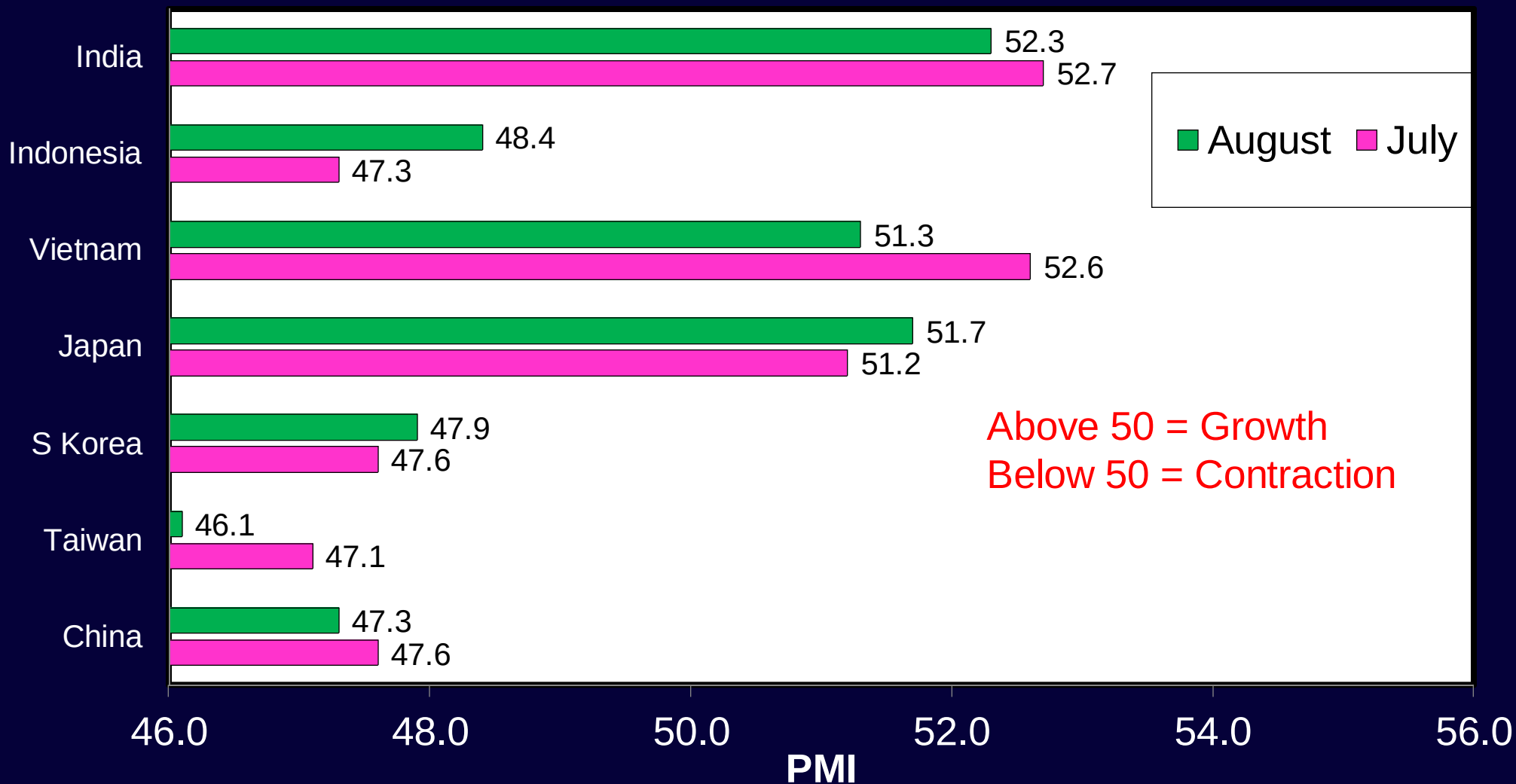
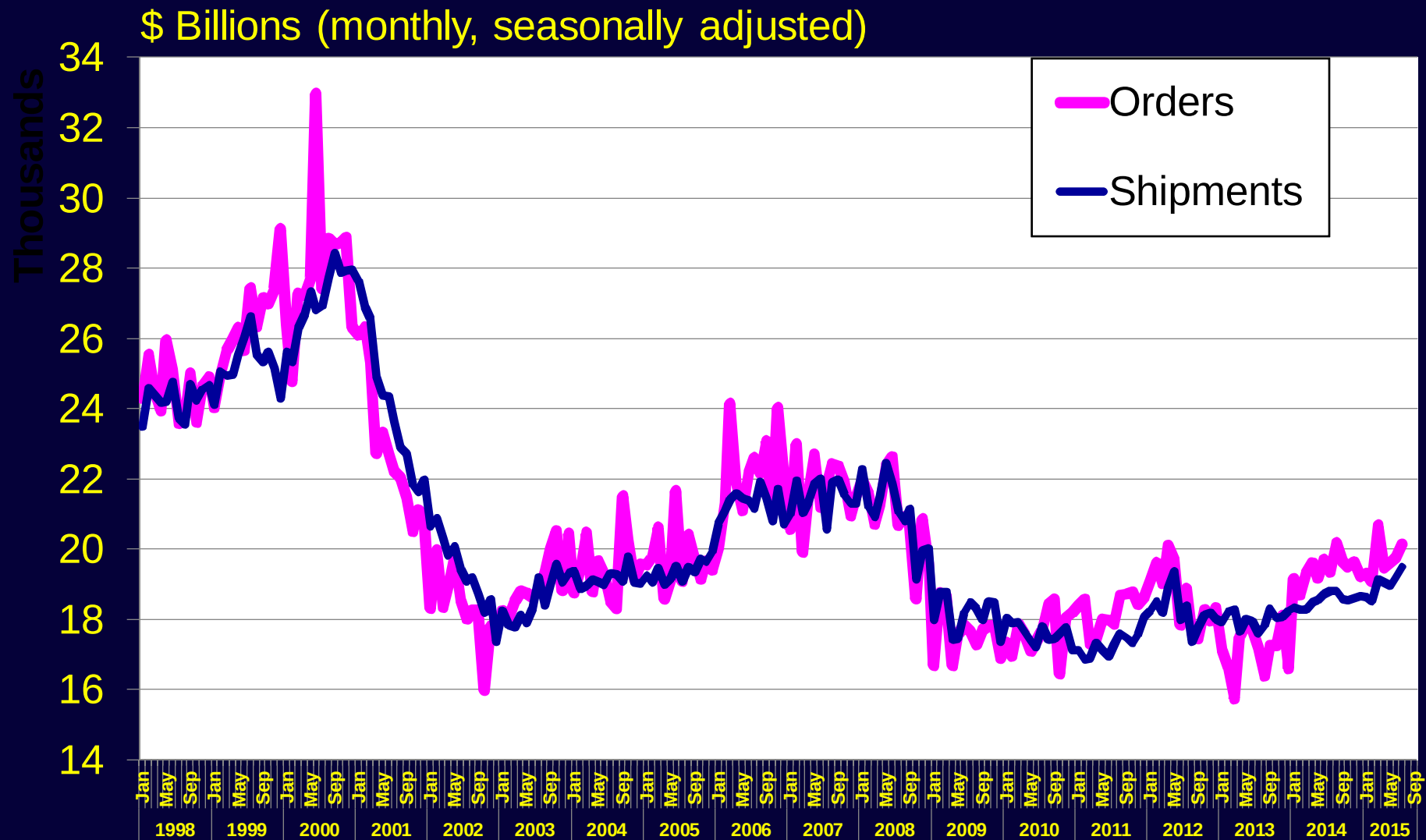


Chart 12

U.S. Electronic Equipment Orders & Shipments

Computer, Communications, Measurement & Control and Military



U.S. Electronic Equipment Orders

Monthly Data

\$ Billions (monthly, seasonally adjusted)

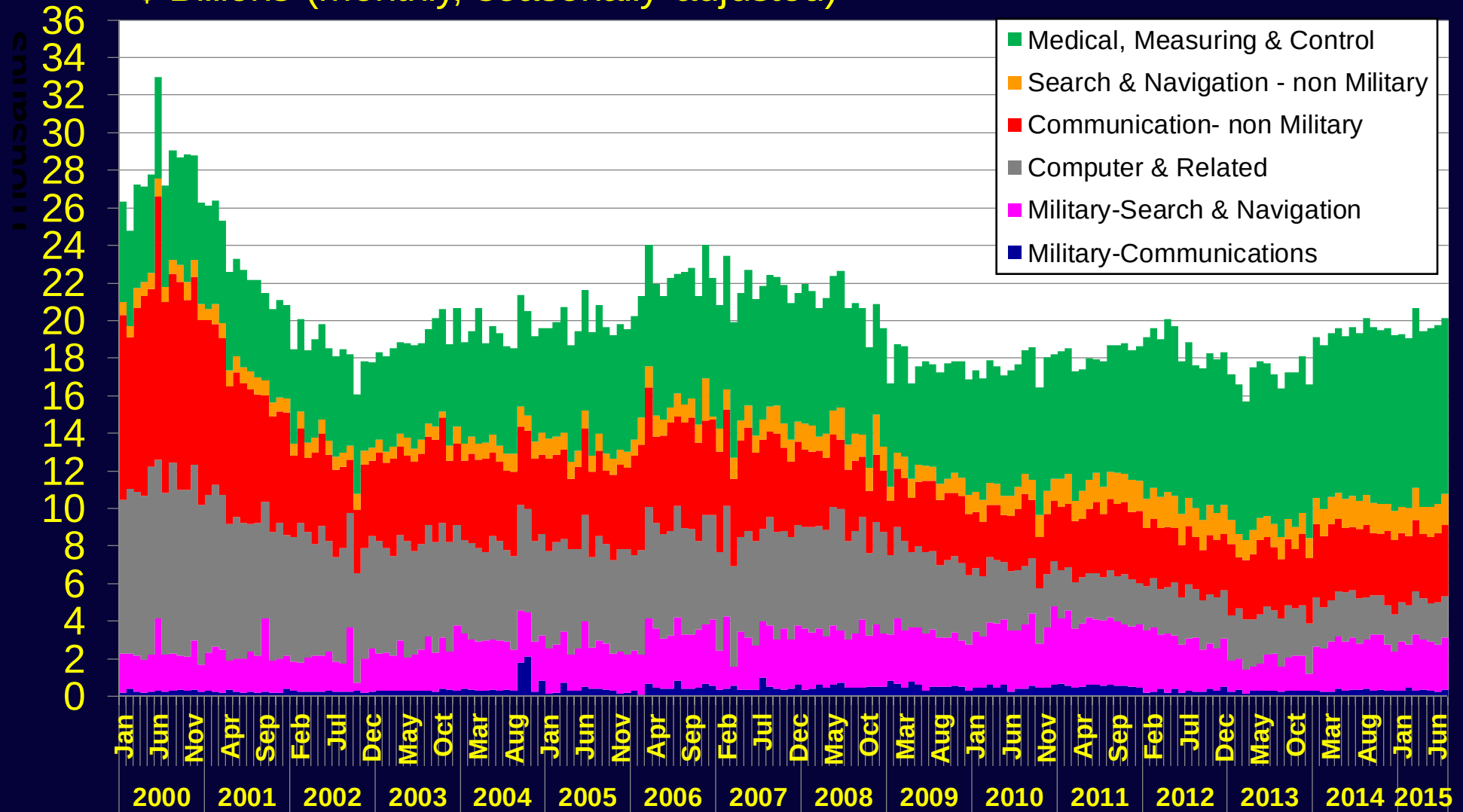
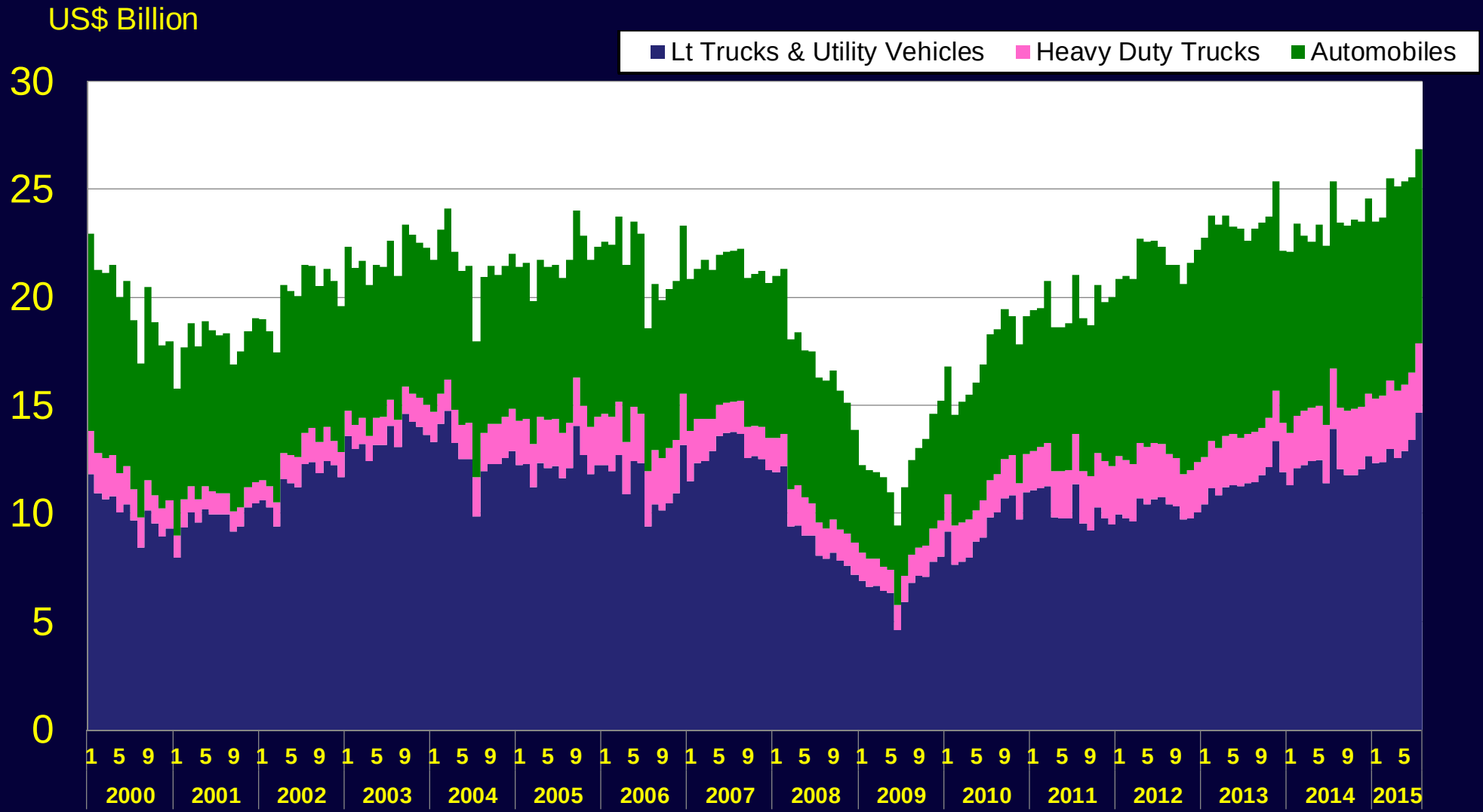


Chart 14

U.S. Vehicle Shipments



U.S. Military Electronics Orders & Shipments

Defense Communication & Search & Navigation Equipment

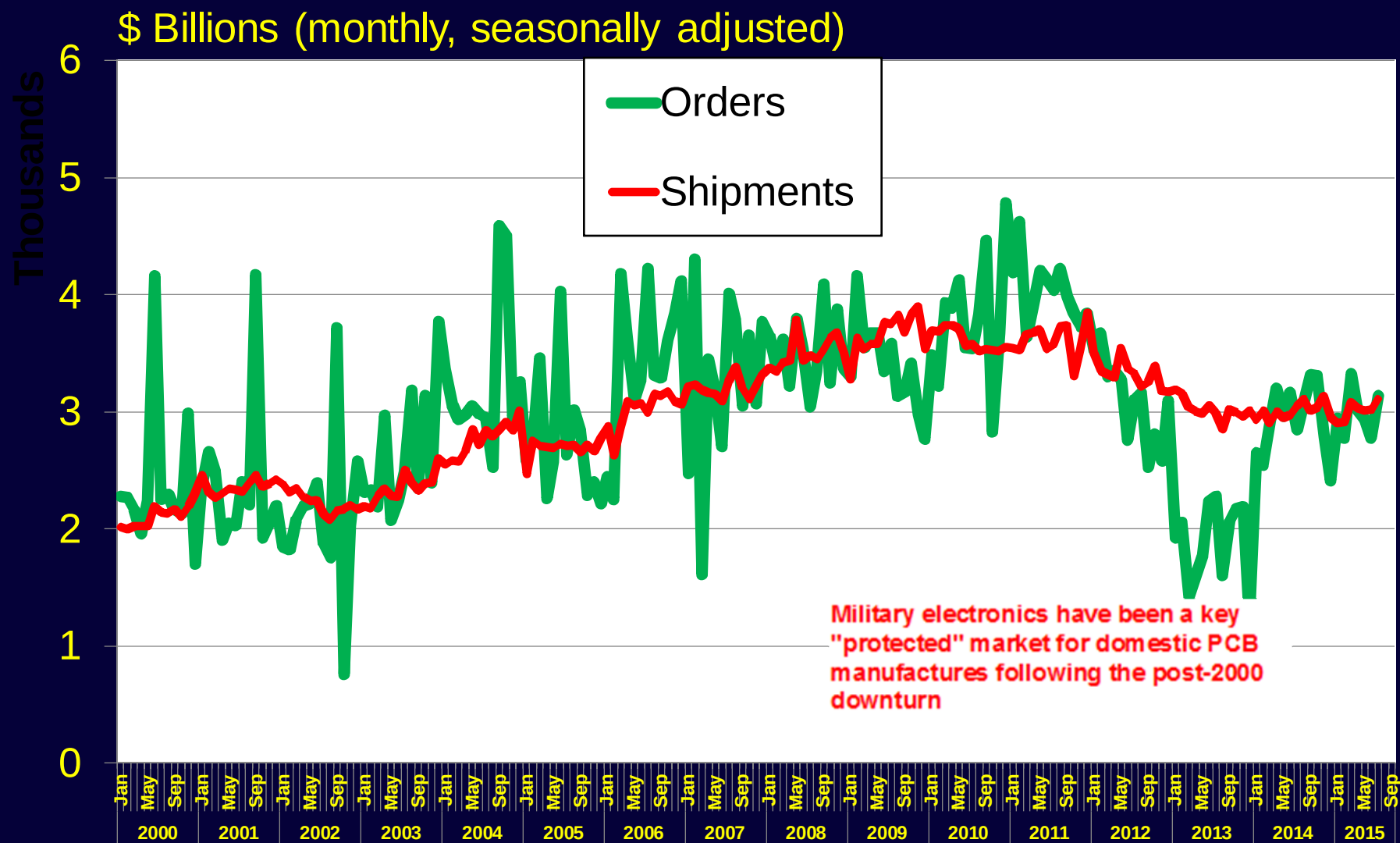


Chart 16

U.S. Electromedical, Measurement & Control Equipment Orders & Shipments

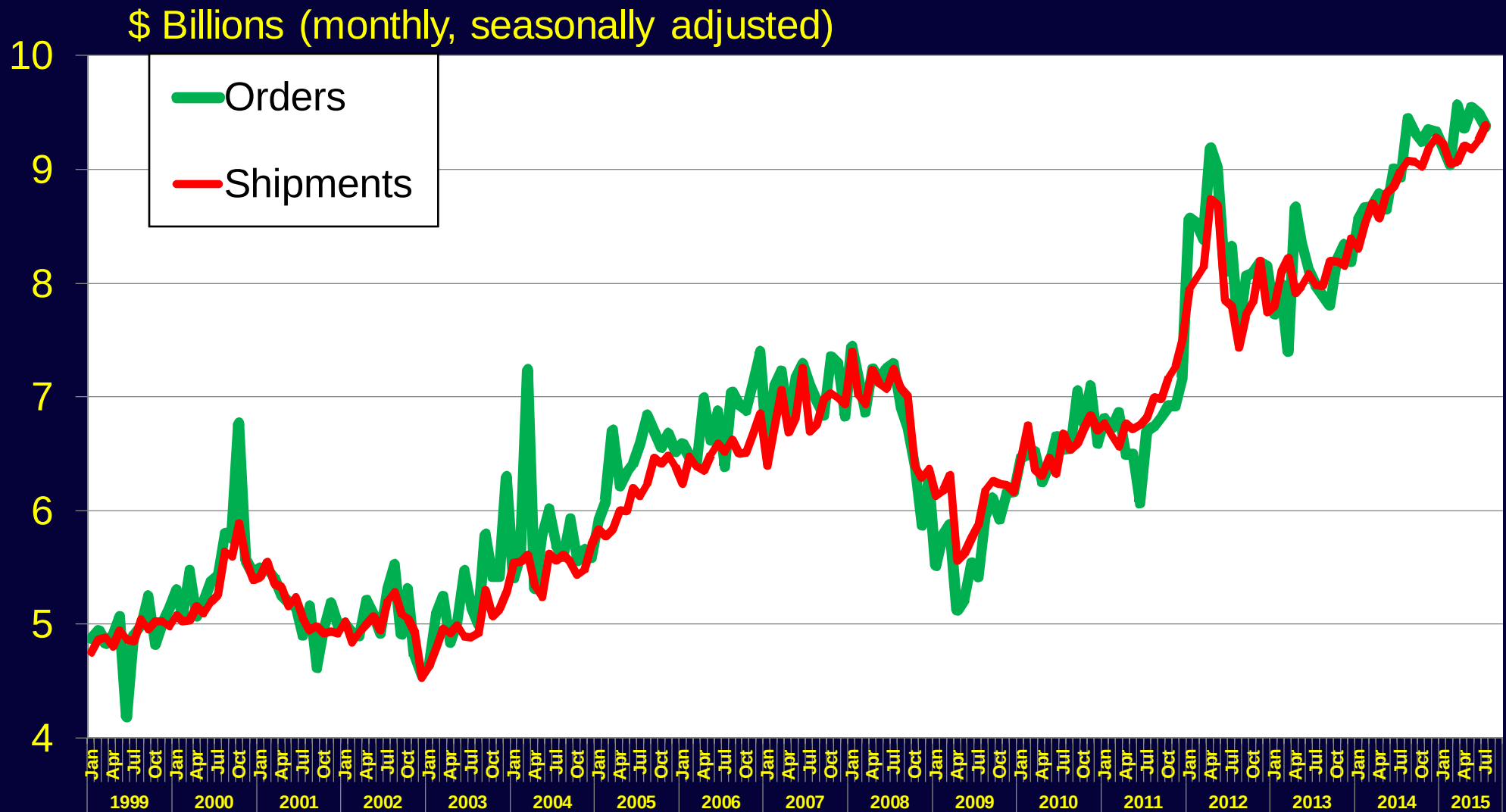
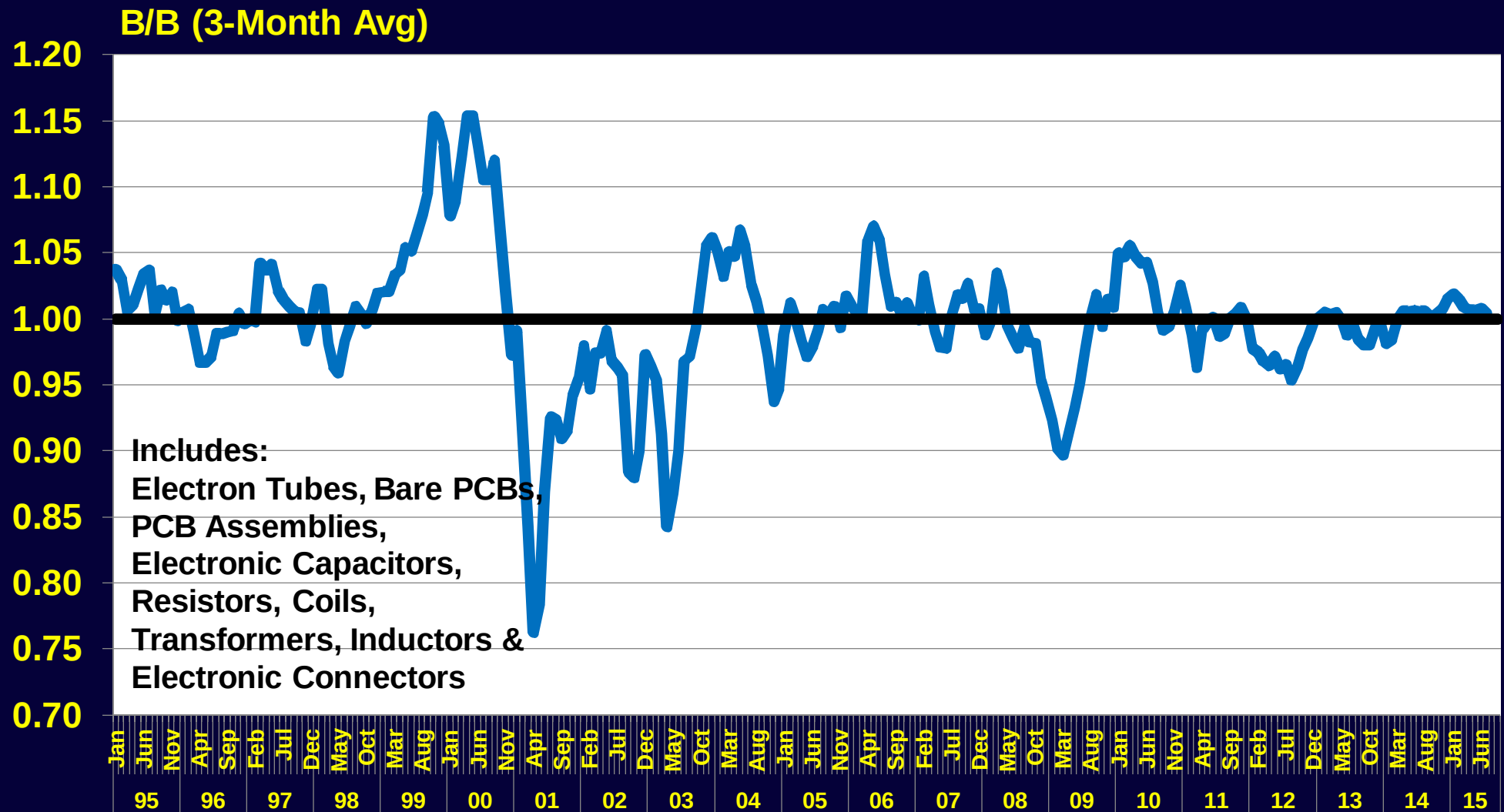


Chart 17

U.S. "Other Electronic Component" Book/Bill Ratio 3-Month Average



<http://www.census.gov/indicator/www/m3/>

U.S. Passive Component Orders & Shipments



Present Growth Rates (%)

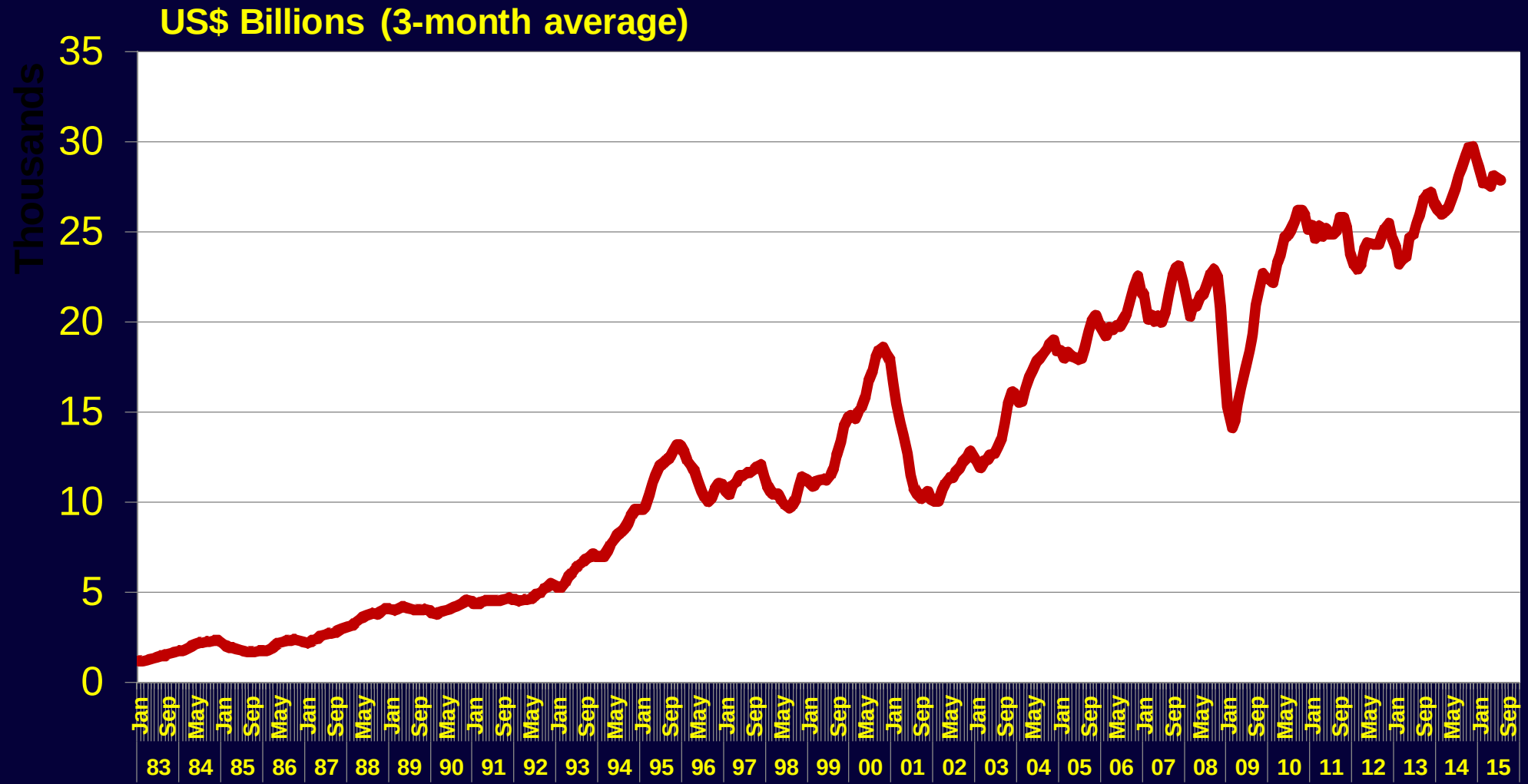
U.S. Economy & Electronics Industry

	Latest Month	Annual Growth	3-Month Growth
Electronic Component \$			
Rigid & Flex PCB Orders (N Amer)	7/15	106.8	110.2
Rigid & Flex PCB Shipments (N Amer)	7/15	99.4	100.9
Electronic Component Orders	7/15	117.3	127.0
Electronic Component Shipments	7/15	115.6	127.3
Semiconductor Shipments to N America	7/15	111.3	105.5
U.S. Electronic Equipment Orders \$			
Computer & Related	7/15	84.7	85.7
Communication	7/15	102.4	105.1
Medical, Measurement & Control	7/15	110.4	106.9
Search & Navigation	7/15	120.6	100.1
Defense Capital Goods	7/15	93.9	108.0
Military Electronics	7/15	121.2	98.6
Total Electronic Equipment	7/15	107.1	102.3
U.S. Industrial Production	7/15	103.1	101.3

NOTE: 3 month growth rates compare most recent 3 months to same 3 months one year earlier

World Semiconductor Shipments

Monthly US\$



CCG Semiconductor Leading Indicator vs. Global Semiconductor Shipments

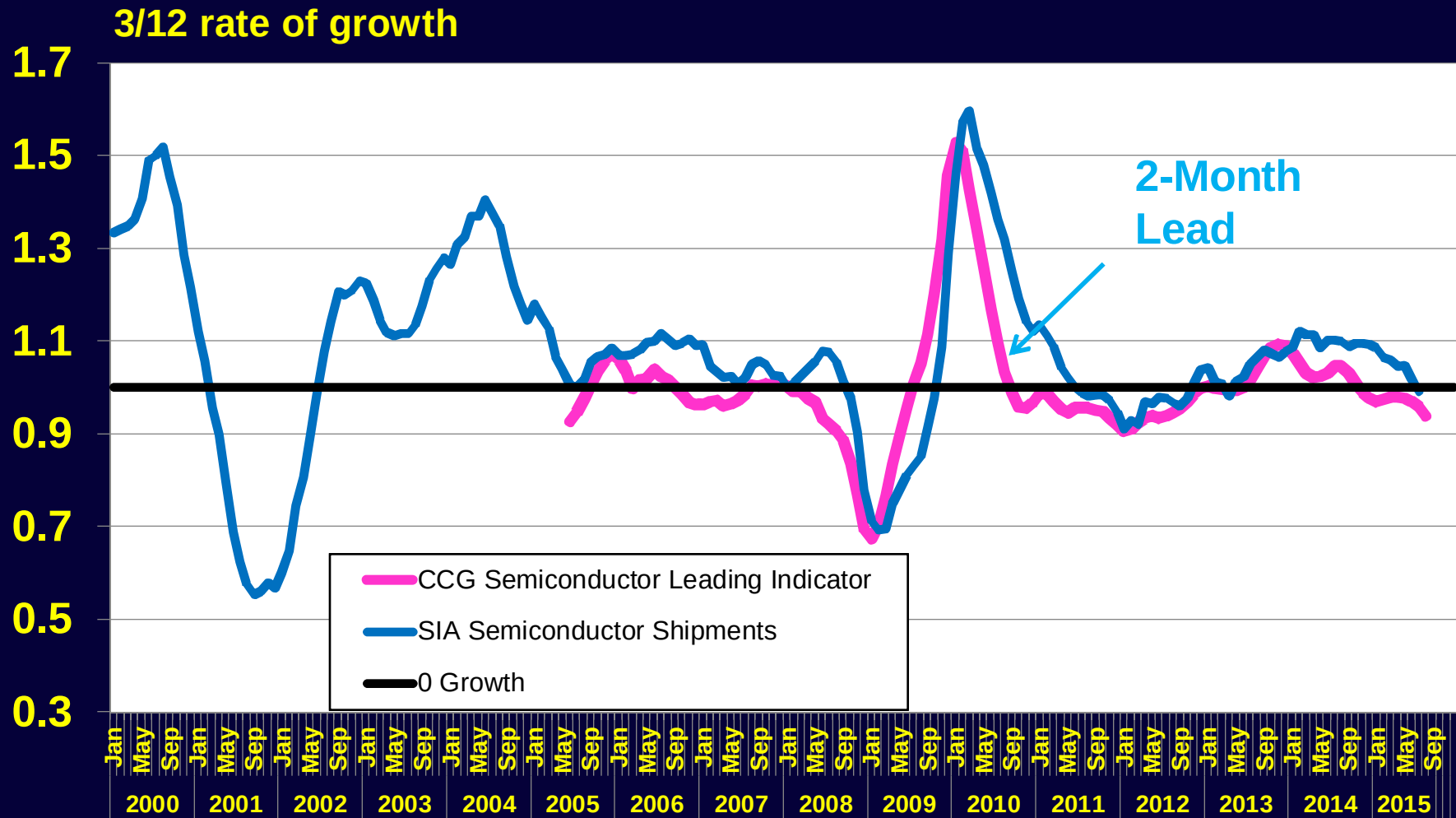
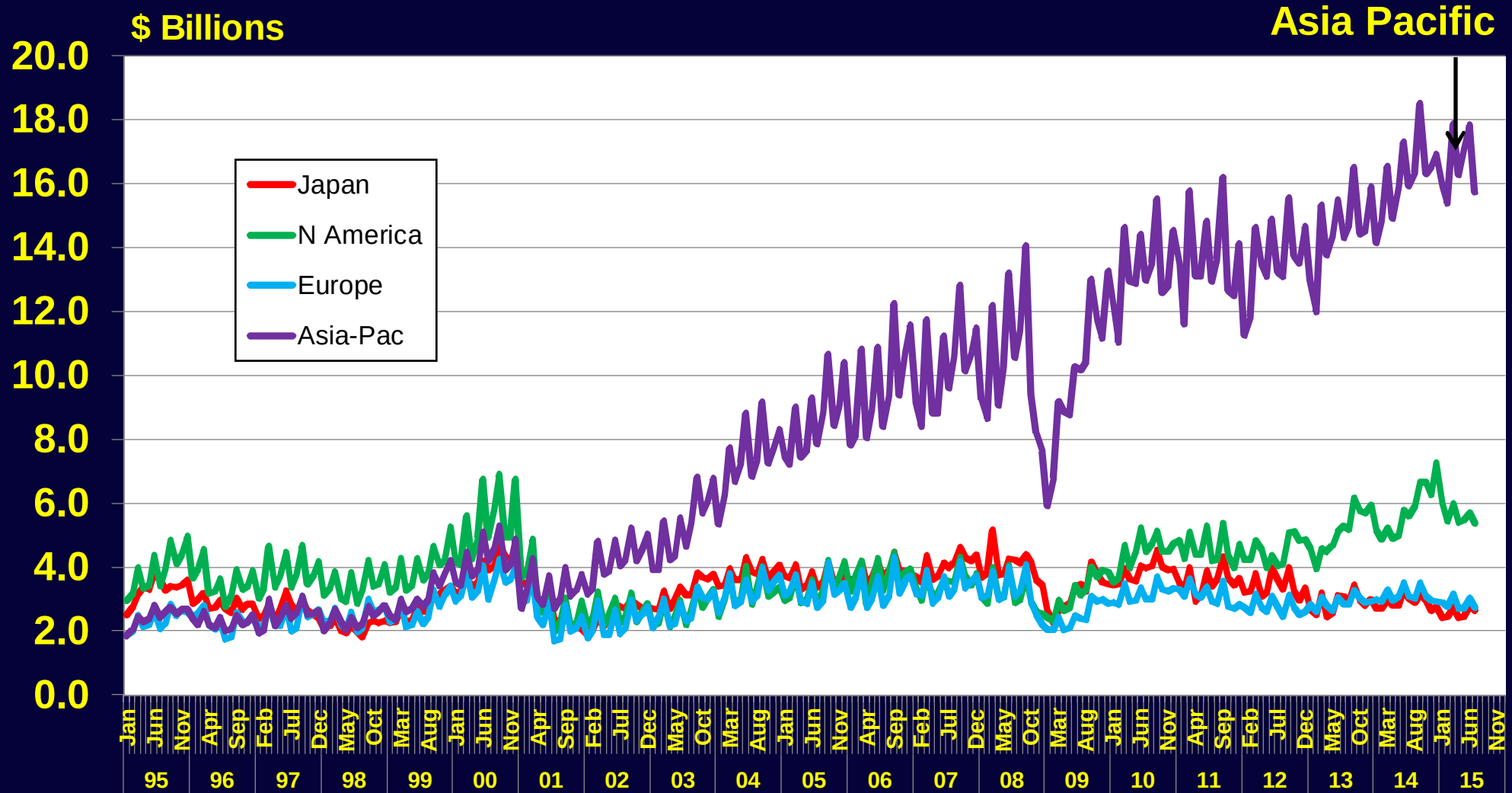


Chart 22

Total Semiconductor Shipments to an Area

Monthly Shipments - Reporting Firms

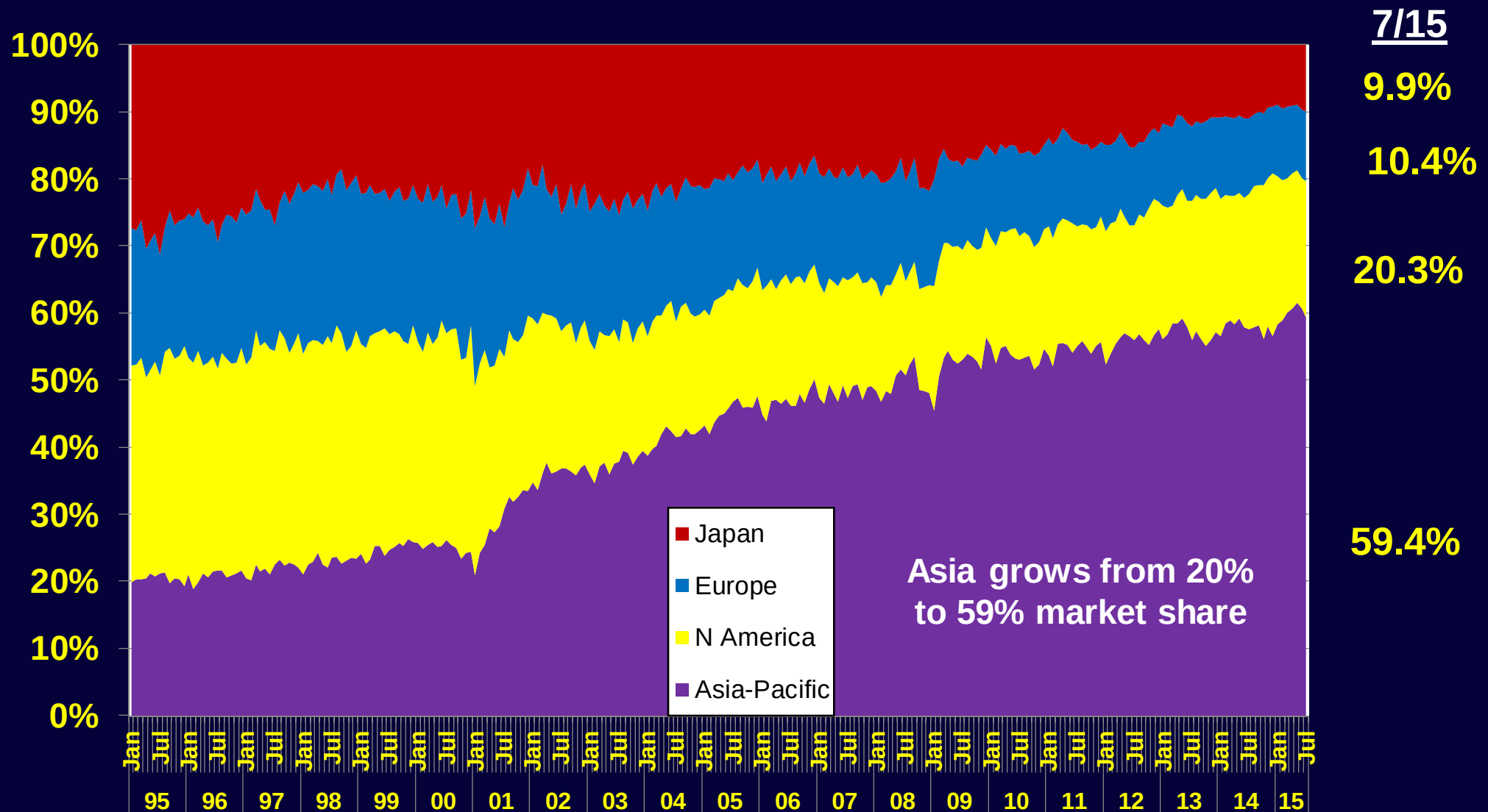


SIA website: www.sia-online.org/

Chart 23

Total Semiconductor Shipments to an Area

Monthly Shipments - Reporting Firms



Monthly Semiconductor Shipments

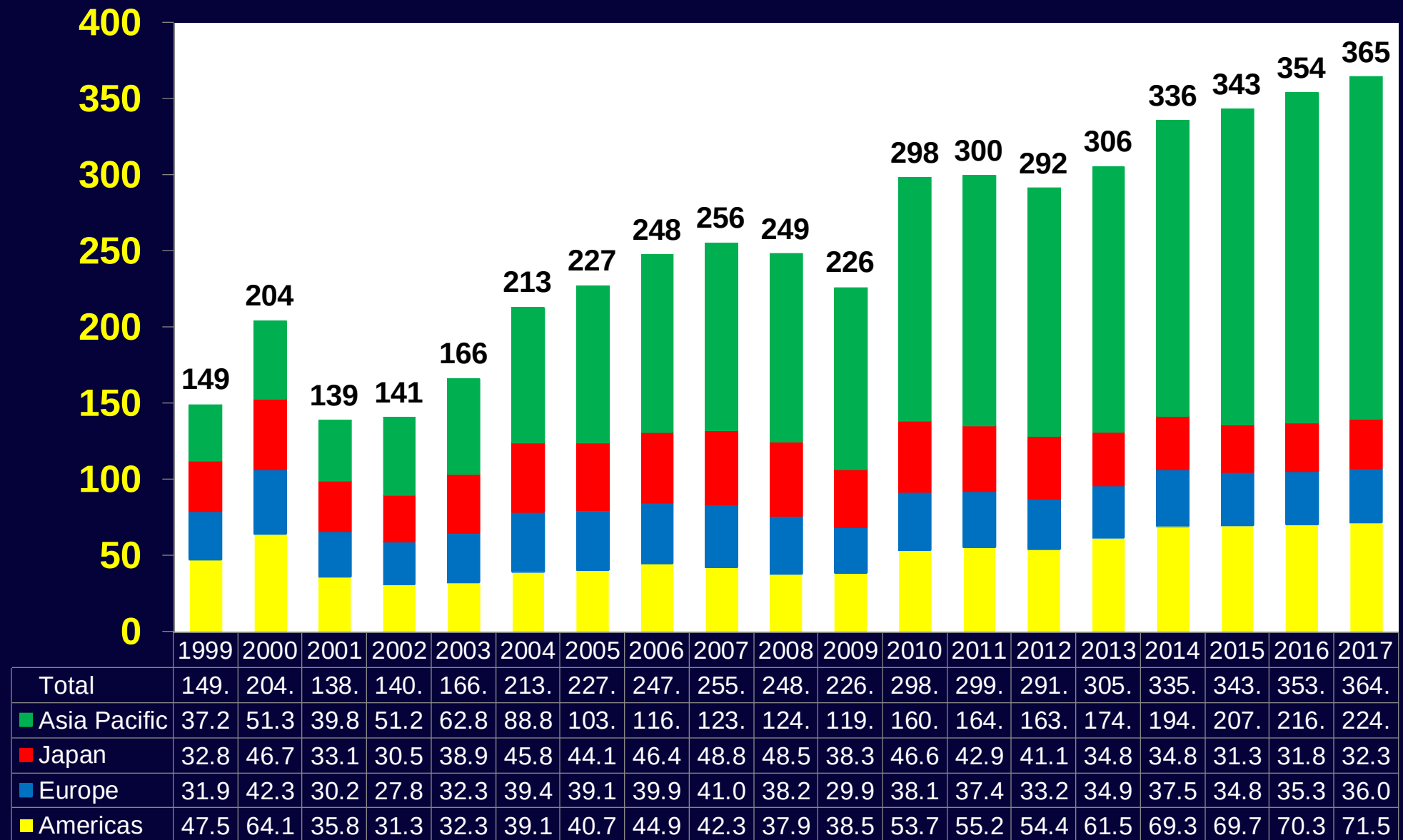
\$ Billions (3-month avg in US\$)

	<u>7/14</u>	<u>7/15</u>	<u>% CH</u>
Americas	5.47	5.52	+ 0.8%
Europe	3.24	2.84	- 12.5%
Japan	3.04	2.64	-13.3%
China	7.75	8.18	+ 5.6%
Asia Pacific / All Other	8.63	8.71	+ 1.0%
Total	28.13	27.88	- 0.9%

Chart 25

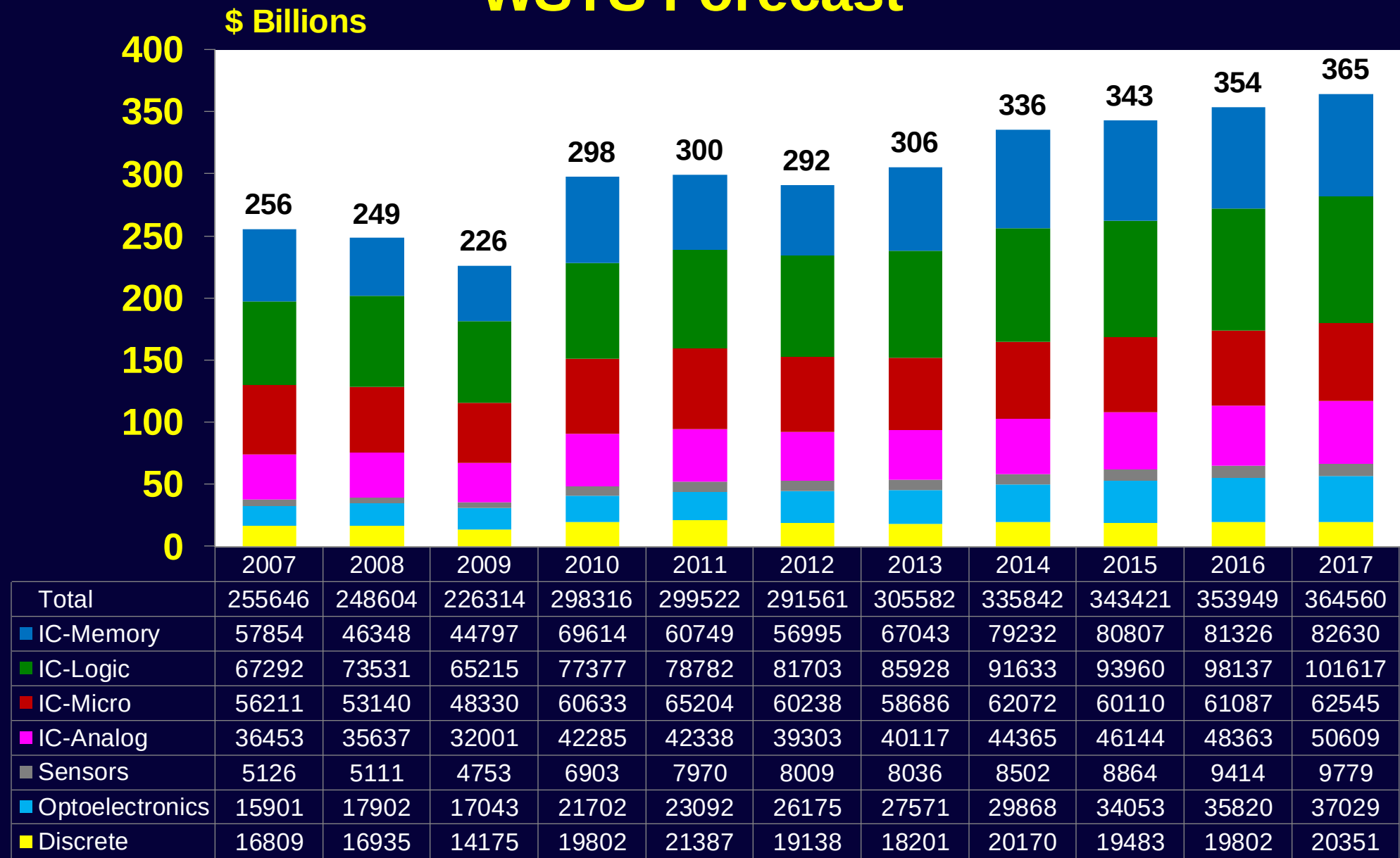
Worldwide Semiconductor Market by Geography

WSTS Forecast



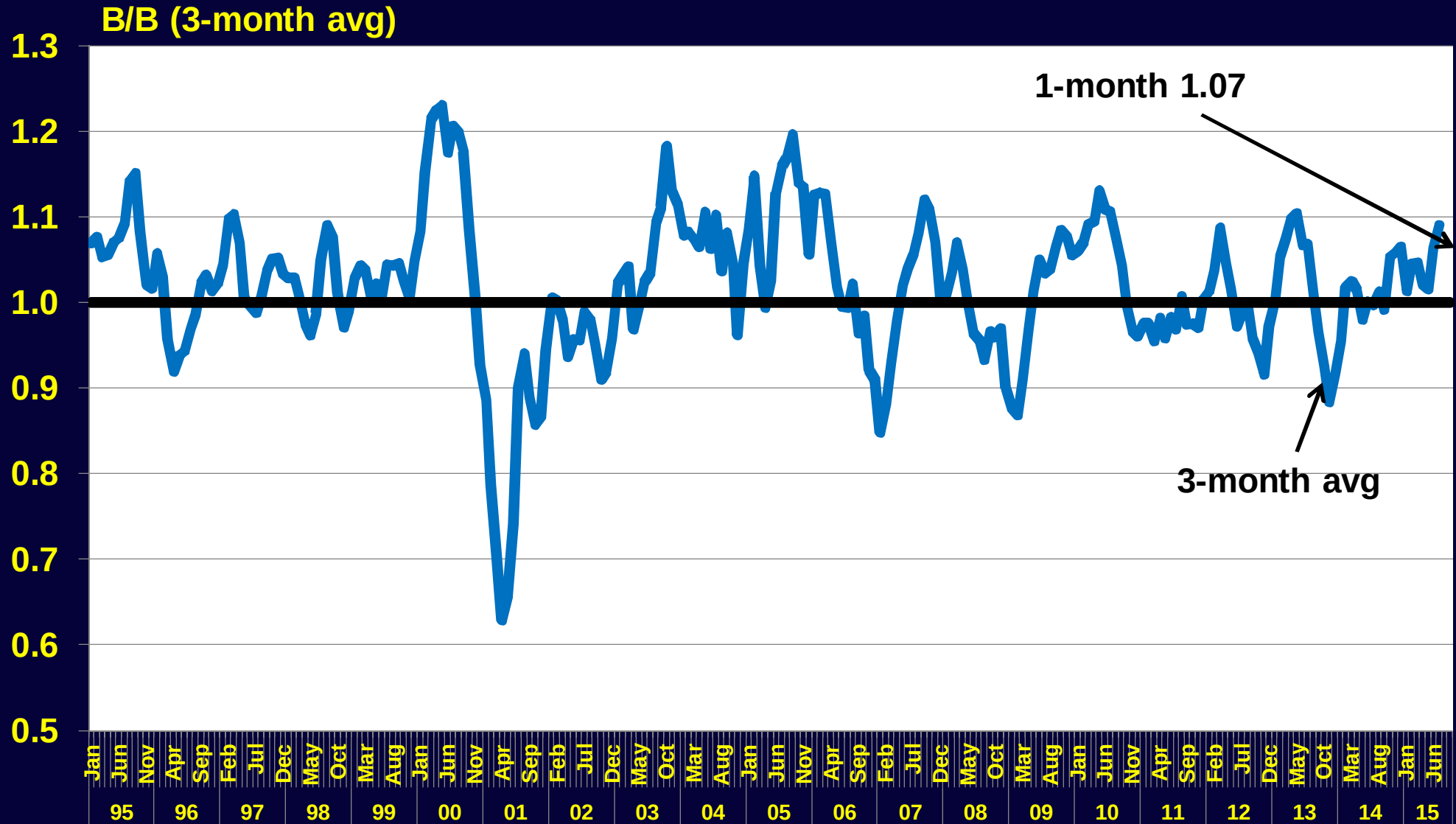
Worldwide Semiconductor Market by Type

WSTS Forecast

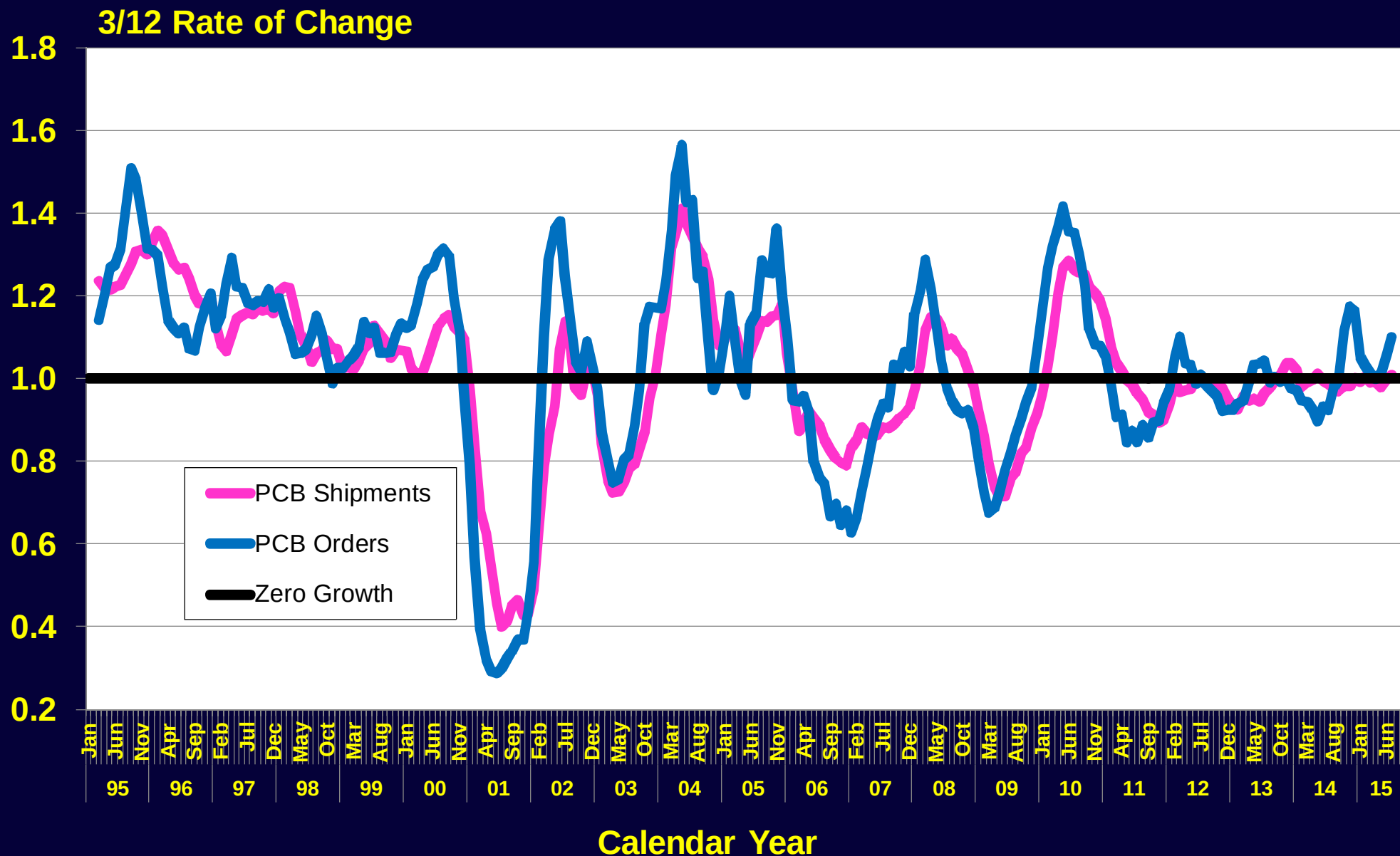


Rigid & Flexible PCB Book/Bill

N. America

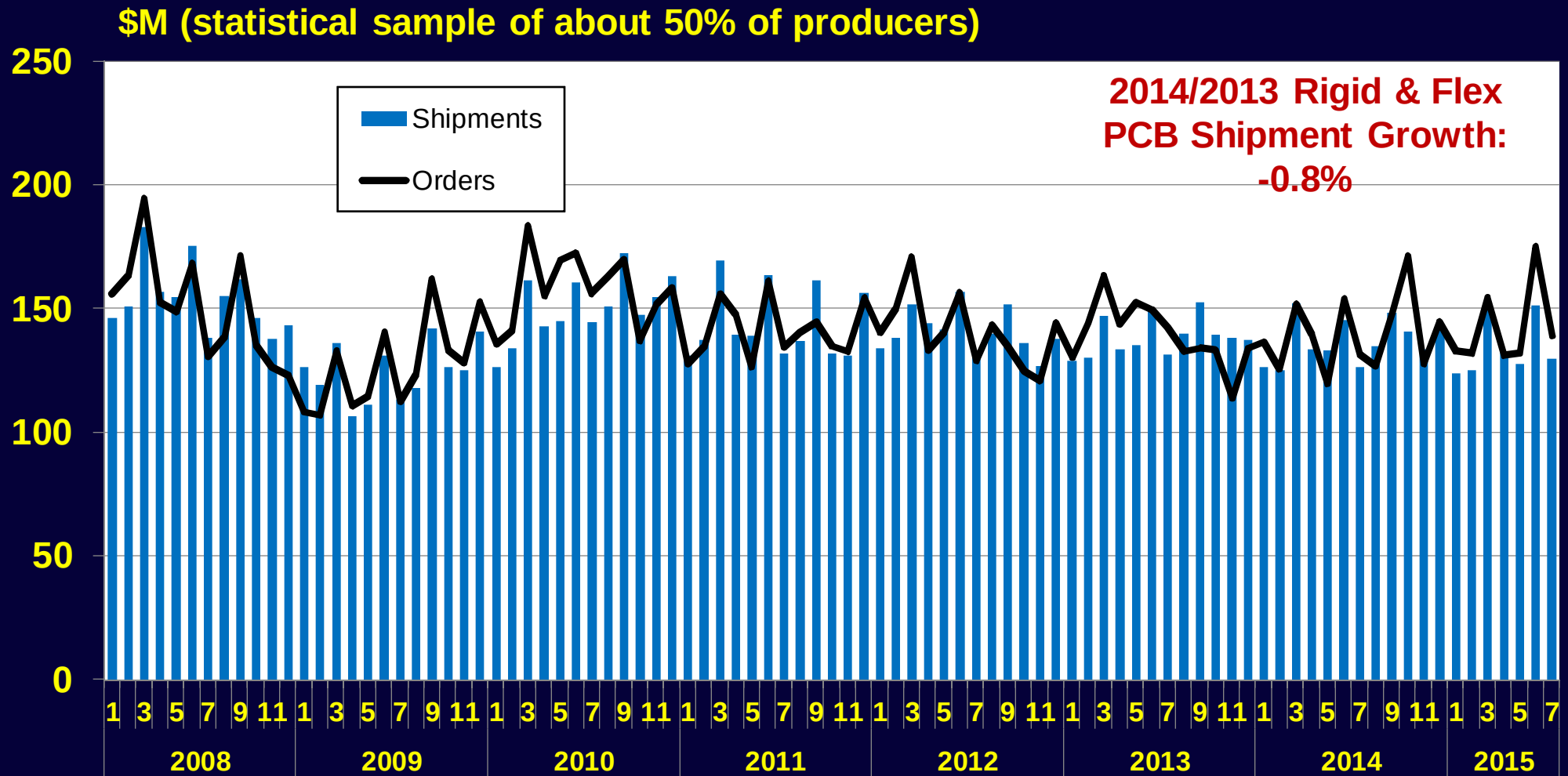


N. America Rigid & Flexible PCB Orders & Shipments



Data: IPC T/MRC & <http://www.census.gov/indicator/www/m3/>

N American Rigid & Flexible PCB Shipments & Orders

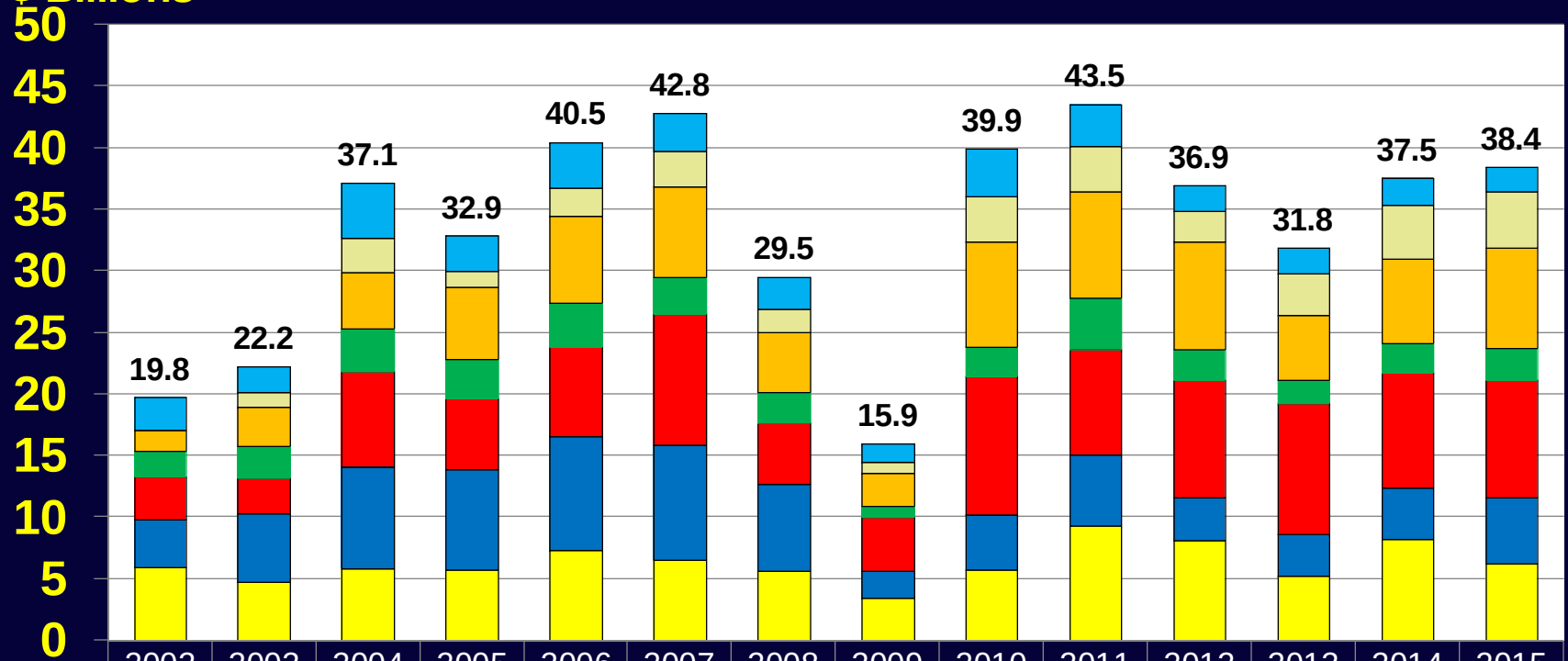


Note: IPC survey captures "market" not domestic production. About 15% of the above represents imported boards resold by N American PCB producers in survey.

Chart 30

Worldwide Semiconductor Capital Equipment Market by Geography (with forecast)

\$ Billions

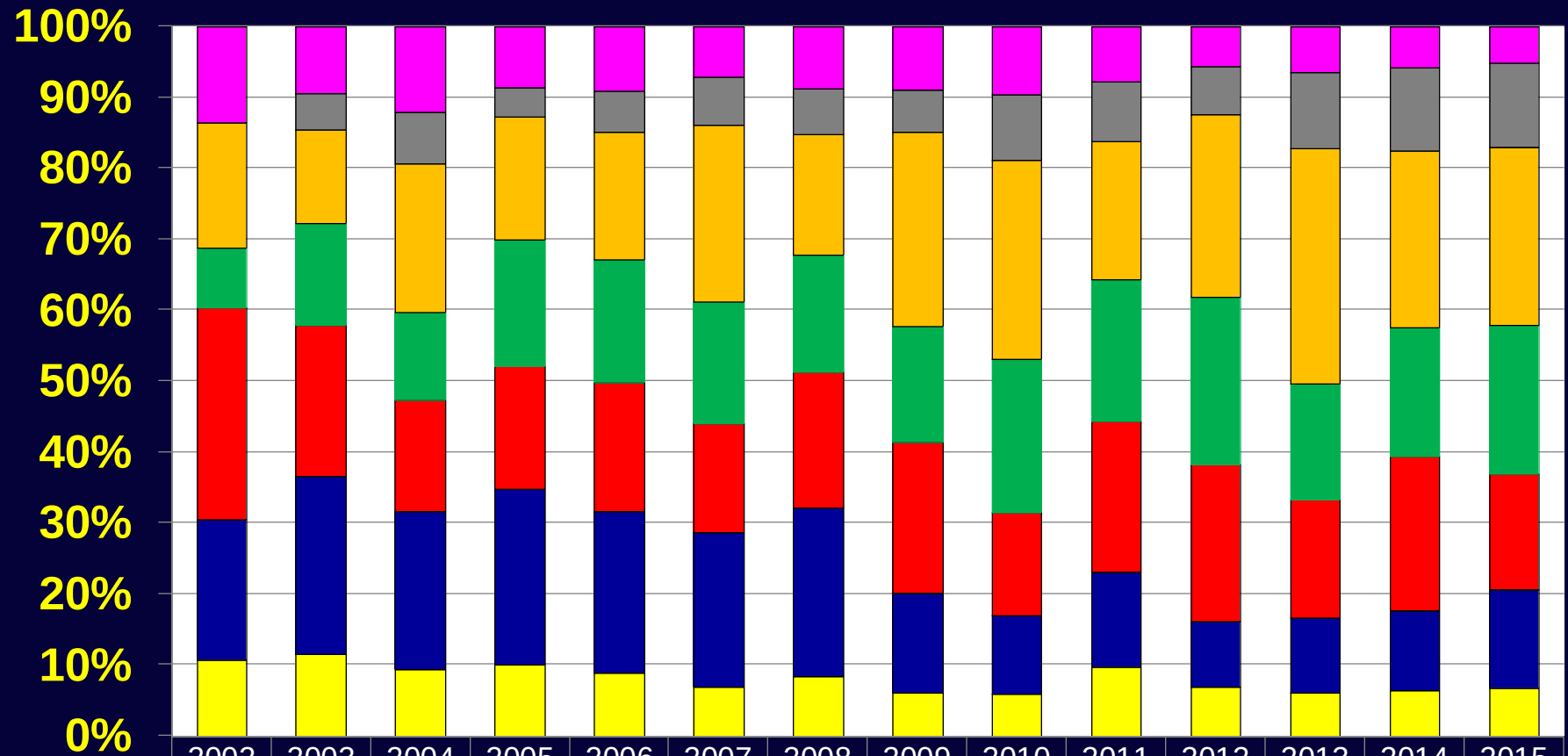


	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total	19.8	22.2	37.1	32.9	40.5	42.8	29.5	15.9	39.9	43.5	36.9	31.8	37.5	38.4
SE Asia	2.7	2.1	4.5	2.9	3.7	3.1	2.6	1.4	3.8	3.4	2.1	2.1	2.2	2.0
China		1.2	2.7	1.3	2.3	2.9	1.9	0.9	3.7	3.7	2.5	3.4	4.4	4.6
S Korea	1.7	3.2	4.6	5.8	7.0	7.4	4.9	2.6	8.6	8.7	8.7	5.2	6.8	8.1
Europe & Mideast	2.1	2.6	3.4	3.3	3.6	2.9	2.5	1.0	2.3	4.2	2.6	1.9	2.4	2.6
Taiwan	3.5	2.9	7.8	5.7	7.3	10.7	5.0	4.4	11.3	8.5	9.5	10.6	9.4	9.6
Japan	3.9	5.6	8.3	8.2	9.2	9.3	7.0	2.2	4.4	5.8	3.4	3.4	4.2	5.3
Americas	5.9	4.7	5.8	5.7	7.3	6.6	5.6	3.4	5.8	9.3	8.2	5.3	8.2	6.3

SEMI 9/15 (and prior reports) – Custer estimates for SE Asia & Europe

Chart 31

Semiconductor Equipment Manufacturing Market

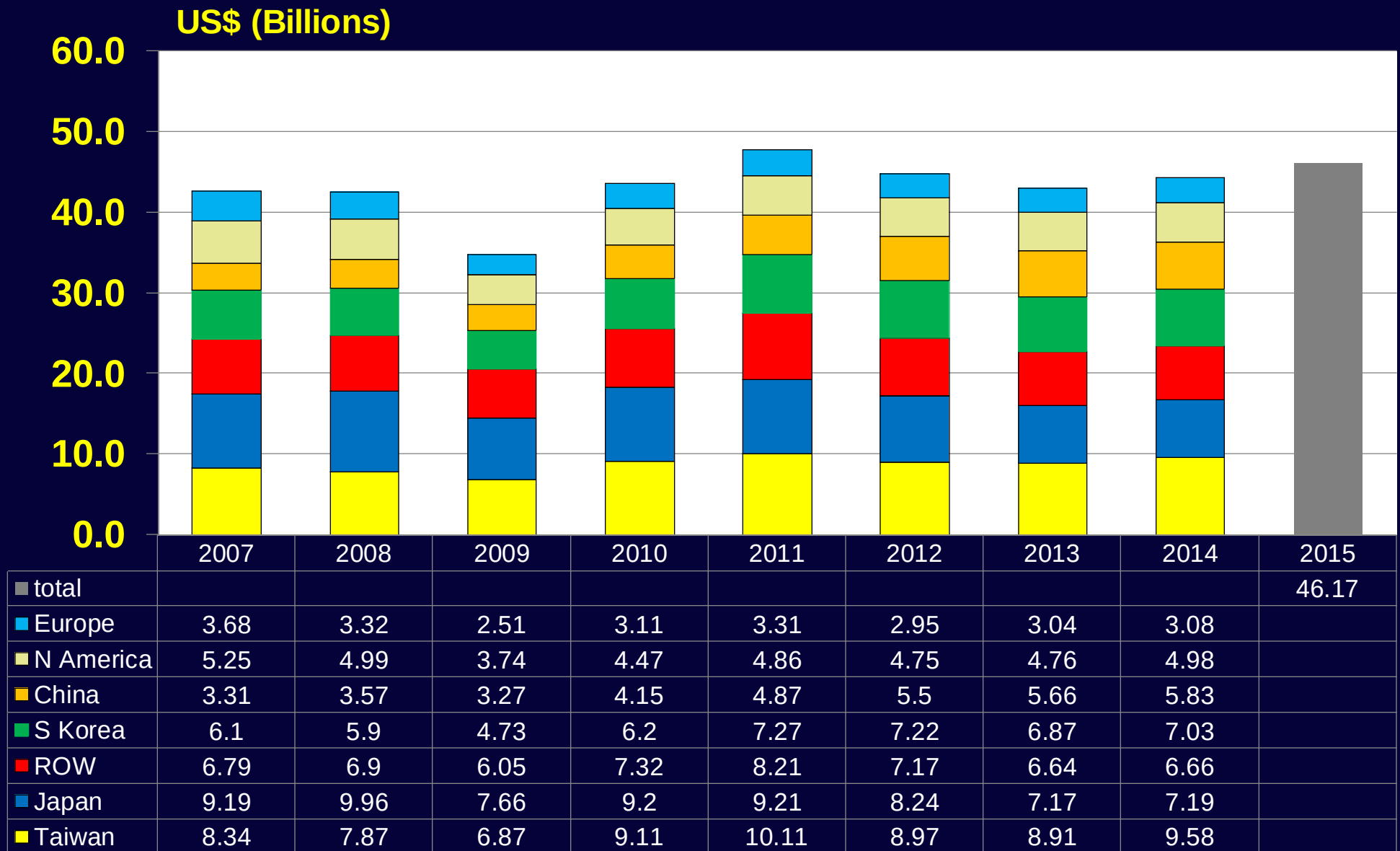


SE Asia	2.7	2.1	4.5	2.9	3.7	3.1	2.6	1.4	3.8	3.4	2.1	2.1	2.2	2.0
China		1.2	2.7	1.3	2.3	2.9	1.9	0.9	3.7	3.7	2.5	3.4	4.4	4.6
Taiwan	3.5	2.9	7.8	5.7	7.3	10.7	5.0	4.4	11.3	8.5	9.5	10.6	9.4	9.6
S Korea	1.7	3.2	4.6	5.8	7.0	7.4	4.9	2.6	8.6	8.7	8.7	5.2	6.8	8.1
Americas	5.9	4.7	5.8	5.7	7.3	6.6	5.6	3.4	5.8	9.3	8.2	5.3	8.2	6.3
Japan	3.9	5.6	8.3	8.2	9.2	9.3	7.0	2.2	4.4	5.8	3.4	3.4	4.2	5.3
Europe & Mideast	2.1	2.6	3.4	3.3	3.6	2.9	2.5	1.0	2.3	4.2	2.6	1.9	2.4	2.6

SEMI/SEAJ 9/15 – Custer estimates for Europe & SE Asia

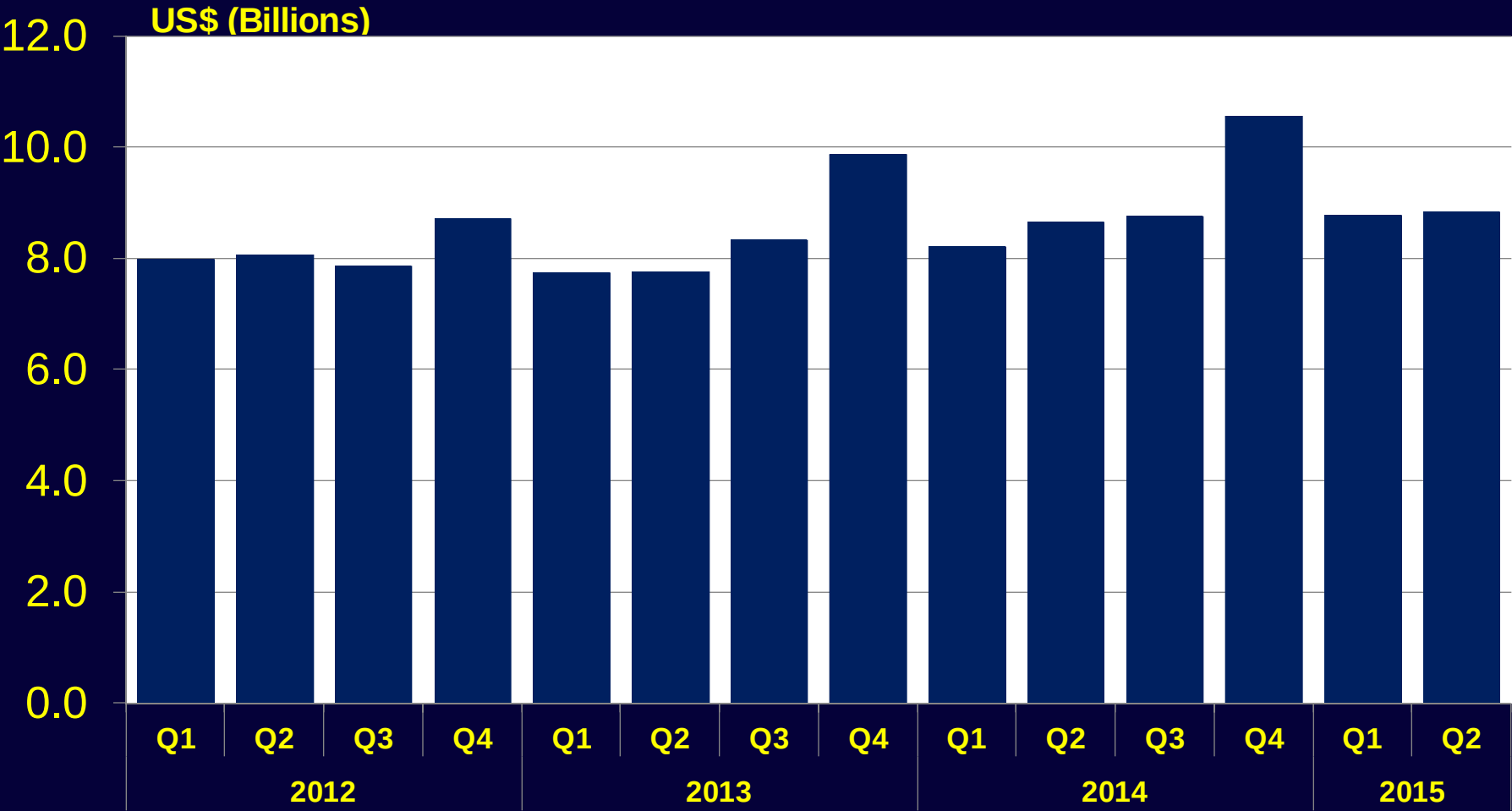
Chart 32

Semiconductor Materials Sales by Region

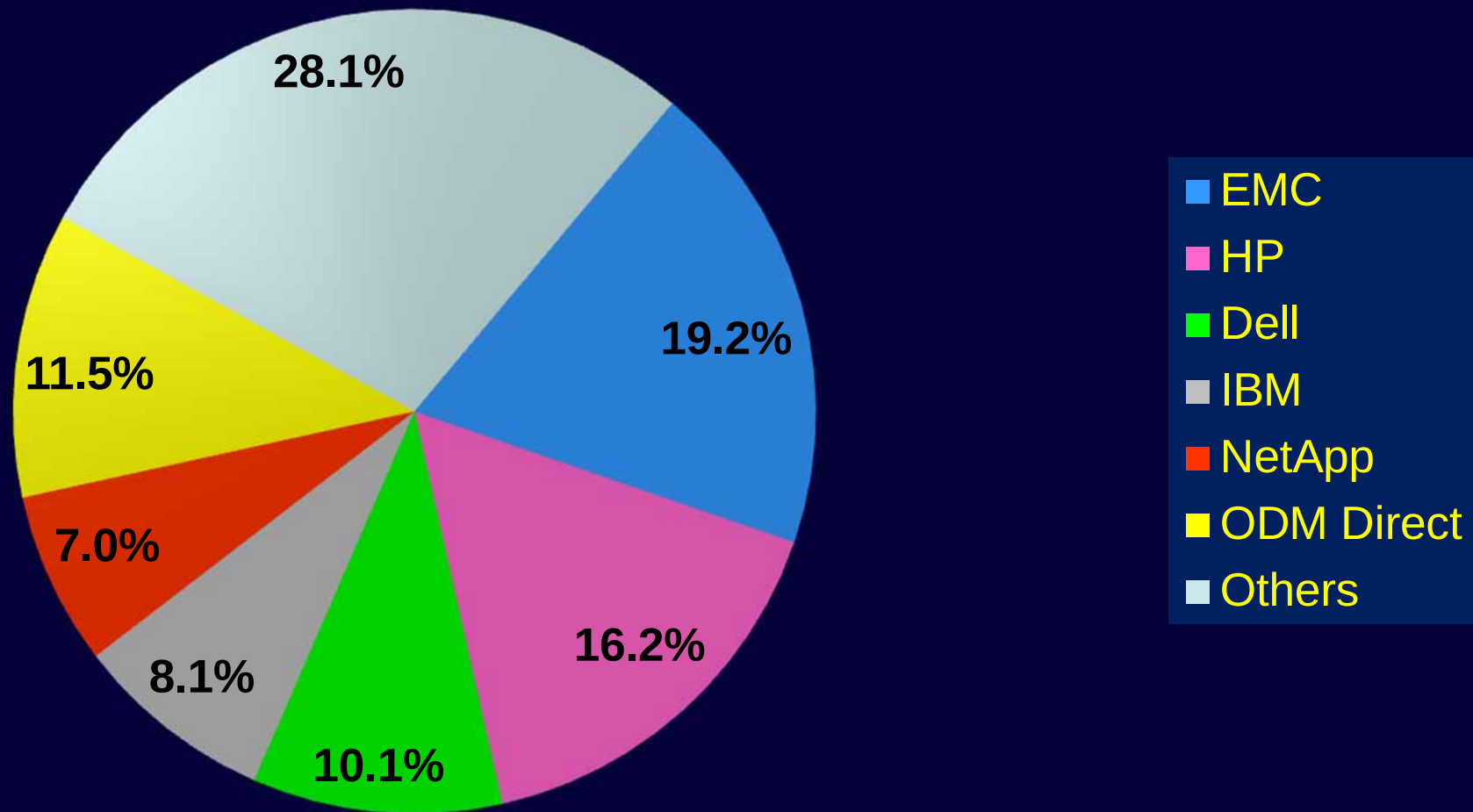


SEMI 9/15 & prior reports

World Total Disk Storage Revenue

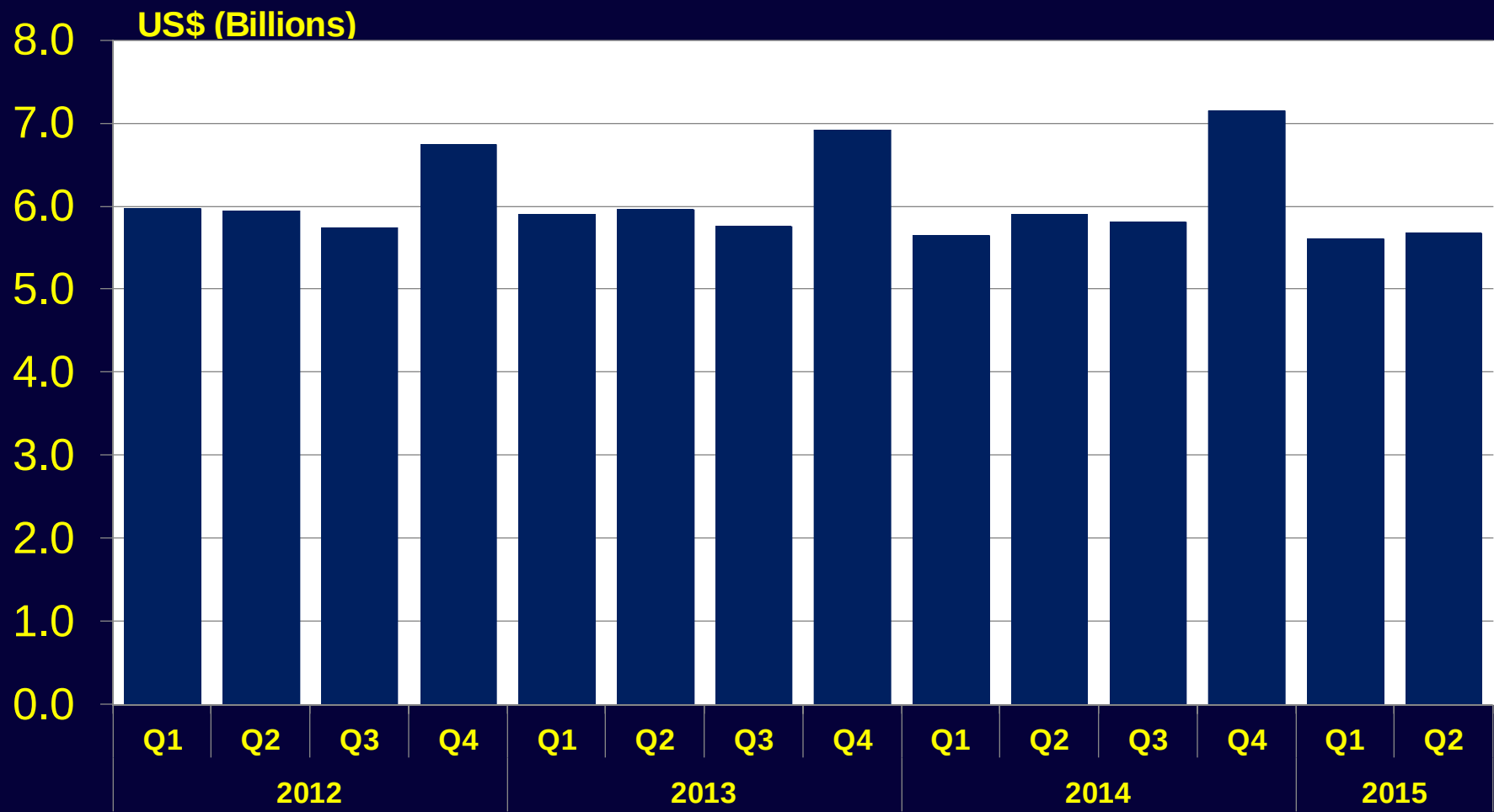


World Total Disk Storage Systems Revenue 2Q'15

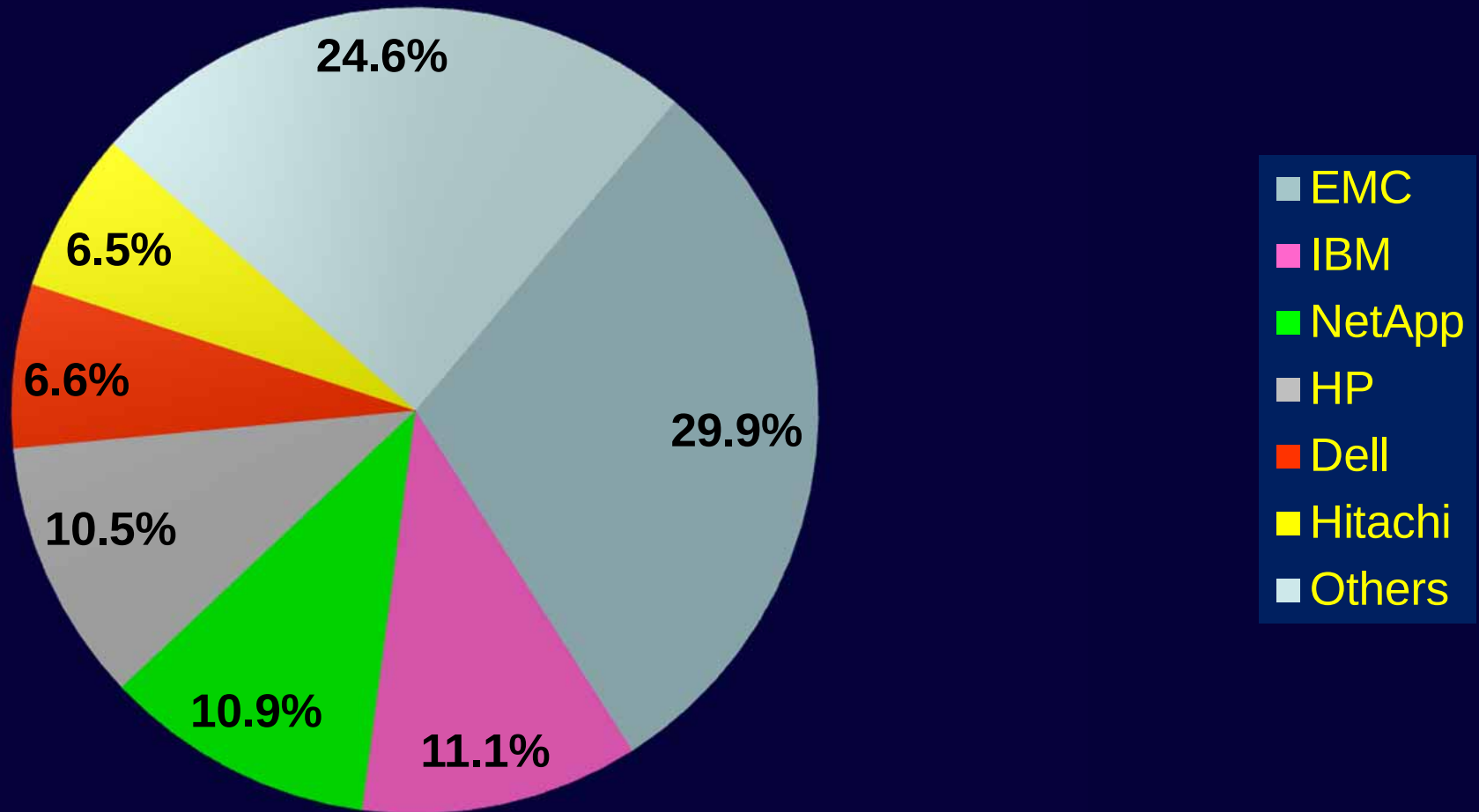


TOTAL: \$8,835 Million

World External Disk Storage Revenue

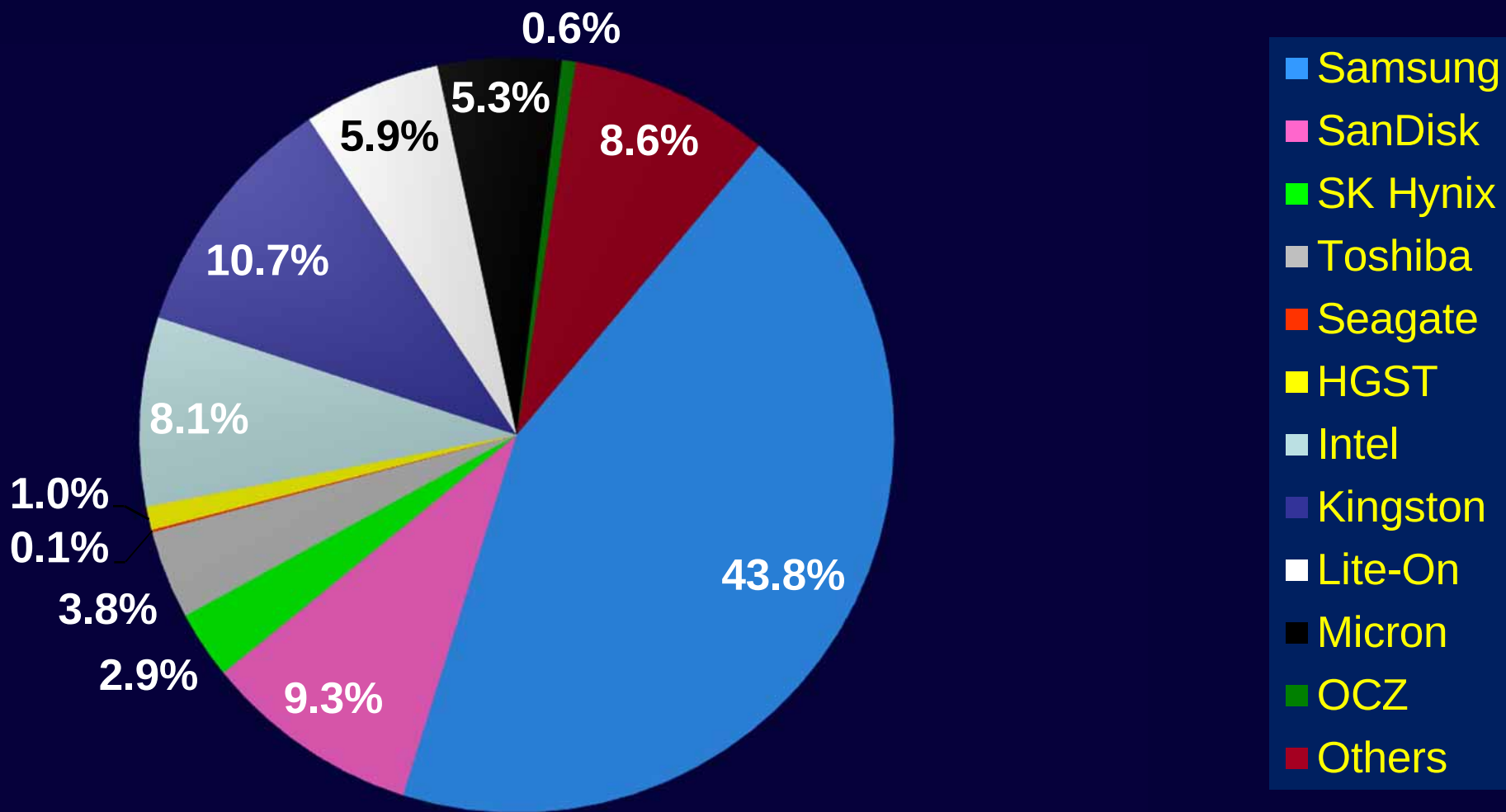


World External Disk Storage Systems Market Revenue 2Q'15



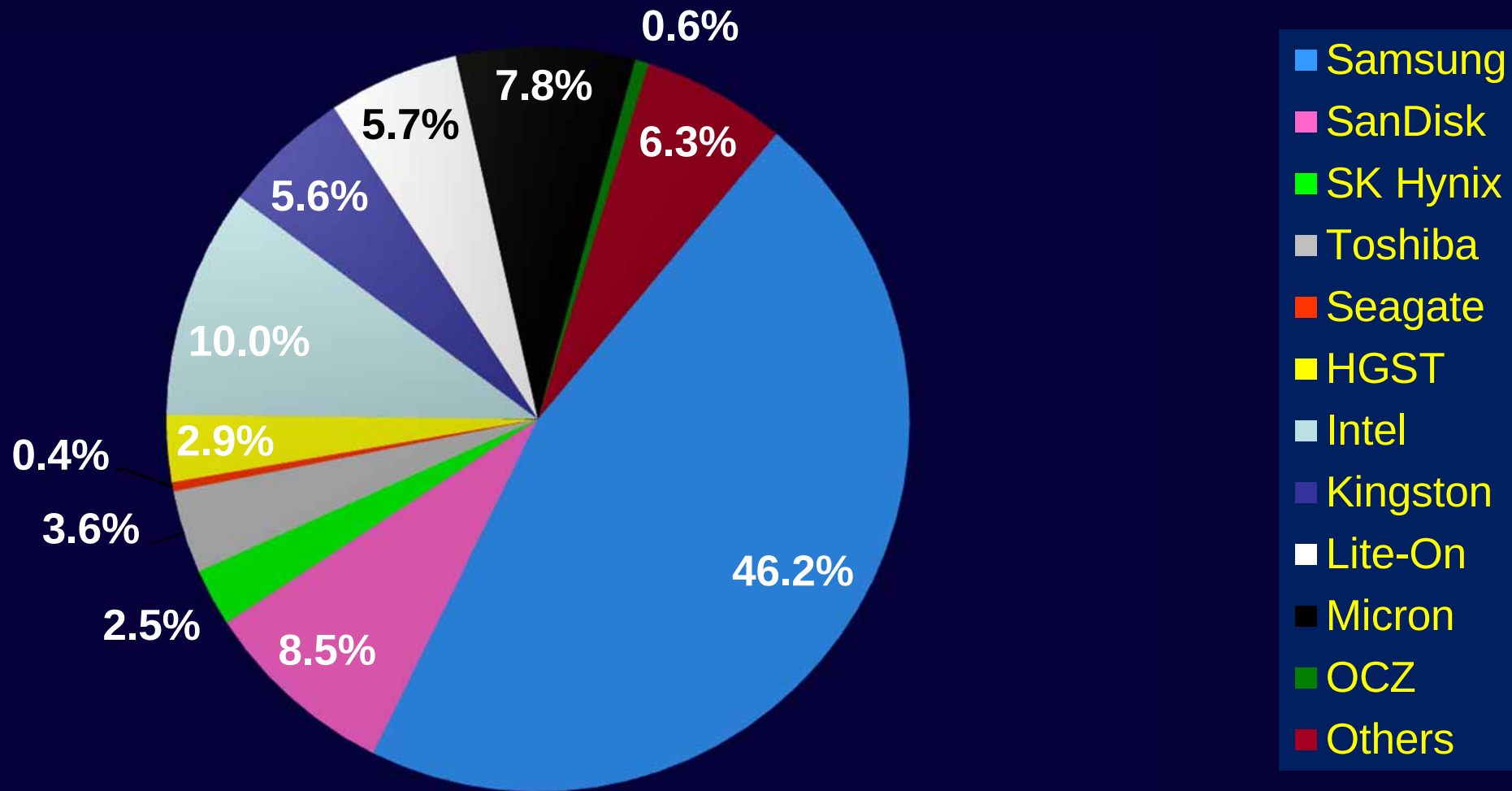
TOTAL: \$5,669 Million

Total SSD Storage Market Share by Supplier Units 2Q'15



Total: 23.9 Million Units

Total SSD Storage Market Share by Supplier Exabytes 2Q'15



Total: 6.4 Exabytes