



The Advanced ASIC Leader

Oct 30, 2025

Global Unichip Corp. (GUC) Reports Financial Results for 3Q25

Hsinchu – Oct 30, 2025 -- Global Unichip Corporation (TAIEX: 3443) today announced consolidated net sales of NT\$8,613 million, income from operations of NT\$ 1,055 million, net income of NT\$ 867 million, and basic earnings per share of NT\$6.47 for the third quarter ended Oct 30, 2025.

Financial Summary

(In NT\$M except EPS and percentage)

	3Q25	2Q25	QoQ	3Q24	YoY
Net Sales	8,613	6,104	41%	6,612	30%
NRE	2,745	1,932	42%	2,421	13%
Turnkey	5,754	4,024	43%	4,015	43%
Others	114	148	-23%	176	-35%
Gross Profit	2,086	2,034	3%	2,366	-12%
Gross Margin	24.2%	33.3%	-9.1PPT	35.8%	-11.6PPT
Operating Expense	1,031	1,091	-5%	1,176	-12%
Income from Operations	1,055	943	12%	1,190	-11%
Operating Margin	12.2%	15.4%	-3.2PPT	18.0%	-5.8PPT
Net Income	867	782	11%	1,034	-16%
Net Profit Margin	10.1%	12.8%	-2.7PPT	15.6%	-5.5PPT
EPS (NT\$)	6.47	5.84	11%	7.71	-16%

Topics in This Report:

- Revenue Analysis
- Gross Margin Analysis
- Expense Analysis
- Net Profit & EPS
- Financial Condition Review
- Cash Flow Analysis

Financial Highlights:

3rd Quarter 2025

- Net Sales was NT\$8,613 million, which increased 41% compared to 2Q25 and also increased 30% from 3Q24.
- In 3Q25, NRE revenue was NT\$ 2,745 million, increasing 42% QoQ and increasing 13% YoY. Turnkey revenue was NT\$5,754 million, increasing 43% QoQ and also increasing 43% YoY.
- Gross Margin was 24.2%, which is 9.1 percentage points lower than 2Q25 and 11.6 percentage points lower than 3Q24, because of lower NRE and Turnkey margin (%) this quarter.
- Operating Margin was 12.2%, decreasing 3.2 percentage points from 2Q25 and also decreasing 5.8 percentage points from 3Q24.
- Net Margin was 10.1%, 2.7 percentage points lower than 2Q25 and 5.5 percentage points lower than 3Q24.
- EPS was NT\$6.47, which increased 11% compared to 2Q25 but decreased 16% from 3Q24.

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Revenue Analysis

● By Segment

NRE by Technology	3Q25	2Q25	3Q24
	%	%	%
3nm & Below	36%	48%	2%
5nm	29%	14%	27%
7nm	24%	22%	47%
16nm & Above	11%	16%	24%
Total	100%	100%	100%

Turnkey by Technology	3Q25	2Q25	3Q24
	%	%	%
3nm & Below	24%	30%	0%
5nm	25%	7%	6%
7nm	9%	4%	13%
16nm & Above	42%	59%	81%
Total	100%	100%	100%

By segment, combined 7nm and below accounted for 89% of total NRE revenue in 3Q25 and 3nm & below accounted for 36%, mainly from "Others" and "AI/ML" applications.

3nm& Below Turnkey revenue contribution started in 4Q24. 5nm& Below accounted for 49% of total Turnkey revenue in 3Q25, mainly from crypto currency and CPU projects. By segment, combined 7 nm and below accounted for 58% of total Turnkey revenue in 3Q25.

● By Technology/Application/Region

Net Sales by Technology	3Q25	2Q25	3Q24
	%	%	%
3nm & Below	29%	35%	1%
5nm	26%	10%	14%
7nm	13%	10%	25%
16nm & Above	32%	45%	60%
Total	100%	100%	100%

Net Sales by Application	3Q25	2Q25	3Q24
	%	%	%
AI/ML	23%	6%	16%
Networking	11%	13%	20%
Digital Consumer	30%	32%	42%
Industry	3%	5%	4%
Others	33%	44%	18%
Total	100%	100%	100%

Net Sales by Reigon	3Q25	2Q25	3Q24
	%	%	%
Taiwan	10%	14%	16%
USA	69%	58%	29%
China	11%	20%	25%
Japan	7%	8%	17%
Korea	2%	0%	11%
Europe	1%	0%	2%
Total	100%	100%	100%

By technology, 7nm and below revenue contribution of total revenue in 3Q25 was 68%. 3nm & below accounted for 29% of total revenue.

By application, major revenue contribution is from "Others" and "AI/ML", which accounted for 33% and 23% respectively, and was mainly from crypto currency and CPU projects.

From a geographic perspective, revenue from Taiwan, China and USA totally accounted for 90% in 3Q25. Revenue from USA accounted for 69% this quarter, mainly from crypto currency and CPU projects.

Gross Margin Analysis

	3Q25		2Q25		3Q24	
	Amount	% of net sales	Amount	% of net sales	Amount	% of net sales
(In NT\$M except percentages)						
Cost of sales	6,527	75.8%	4,070	66.7%	4,246	64.2%
Gross profit	2,086	24.2%	2,034	33.3%	2,366	35.8%

Gross margin rate was 24.2% in 3Q25, lower than 33.3% in 2Q25 and 35.8% in 3Q24, which is due to lower NRE and Turnkey margin (%) this quarter.

Expenses Analysis

	3Q25		2Q25		3Q24	
	Amount	% of net sales	Amount	% of net sales	Amount	% of net sales
(In NT\$M except percentages)						
SG&A Exp	218	2.5%	254	4.2%	316	4.8%
R&D Exp	813	9.5%	837	13.7%	860	13.0%
Total operating expenses	1,031	12.0%	1,091	17.9%	1,176	17.8%

Total operating expenses in 2Q25 represented 12.0% of net sales, lower than 17.9% in 2Q25 and 17.8% in 3Q24 because of higher revenue this quarter.

From the perspective of dollar amount, operating expenses decreased both on QoQ and YoY basis, which is contributed to higher base in 3Q24 because of bad debt provision.

Net Profit & EPS

	3Q25		2Q25		3Q24	
	Net Income	EPS (NT\$)	Net Income	EPS (NT\$)	Net Income	EPS (NT\$)
(In NT\$M except EPS)						
	867	6.47	782	5.84	1,034	7.71

Net income in 3Q25 was NT\$867 million and EPS was NT\$6.47, increasing 11% compared with 2Q25 but decreasing 16% on YoY basis.

Financial Condition Review

● Liquidity Analysis

	Unit: NT\$M		
	9,30,2025	6,30,2025	9,30,2024
Assets			
Cash and cash equivalents	8,043	6,695	9,257
Accounts receivable, net	2,035	1,602	2,145
Inventories	9,422	6,116	3,214
Other current assets	6,978	11,459	5,814
Total current assets	26,478	25,872	20,430
Property, plant and equipment	1,077	986	465
Other non-current assets	1,262	1,172	954
Total assets	28,817	28,030	21,849
Liabilities			
Current liabilities	16,508	16,698	10,928
Non-current liabilities	601	529	474
Total liabilities	17,109	17,227	11,402
Equity			
Total equity	11,708	10,803	10,447
Total liabilities and equity	28,817	28,030	21,849
Net working capital (NT\$M)	9,970	9,174	9,502
Current ratio(%)	160	155	187

At the end of 3Q25, total assets were NT\$28,817 million, and total liabilities were NT\$17,109 million. Inventory increased significantly to prepare for subsequent shipments, and contract liability remains at around the same level as the previous quarter end. Cash and cash equivalents increased so both net working capital and current ratio increased compared to previous quarter.

Days of A/R turnover and Inv. turnover in 3Q25 were 19 days and 109 days, respectively. Attributed to higher revenue, both ratio improved on QoQ and YoY basis, except inv.turnover days compared with 3Q24 because of significant inventory increase.

● Receivable and Inventory

	3Q25	2Q25	3Q24
A/R turnover days	19	24	28
Inv. turnover days	109	118	80

Cash flow analysis

	Unit: NT\$M		
	3Q25	2Q25	3Q24
Cash flows from operating activities:	(576)	187	2,626
Cash flows from investing activities:	1,905	(718)	(670)
Cash flows from financing activities:	(19)	(2,164)	(21)
Effect of exchange rate changes on cash and cash equivalents	38	(109)	15
Net increase (decrease) in cash and cash equivalents	1,348	(2,804)	1,950
Cash and cash equivalents, beginning of period	6,695	9,499	7,307
Cash and cash equivalents, end of period	8,043	6,695	9,257

Most of revenue in 3Q25 are prepaid in advance so operating activities were cash outflow in this quarter.

Investment activities this quarter were net cash inflows, primarily due to the disposal of Taiwan dollar money market funds.



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GLOBAL UNICHIP CORP. (GUC) is the Advanced ASIC Leader™ whose customers target IC devices to leading edge computing, communications, and consumer applications. Based in Hsin-chu, Taiwan GUC has developed a global reputation with a presence in China, Europe, Japan, Korea, Vietnam and North America. GUC is publicly traded on the Taiwan Stock Exchange under the symbol 3443. For more information, please visit GUC's company website ([http:// www.guc-asic.com](http://www.guc-asic.com)) for details.

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