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Oct 29, 2026

Global Unichip Corp. (GUC) Reports Financial Results for 3Q26

Hsinchu – Oct 29, 2026 -- Global Unichip Corporation (TAIEX: 3443) today announced consolidated net sales of NT$18,755 million, and income from operations of NT$ 2,552 million, net income of NT$ 2,272 million, and basic earnings per share of NT$16.95 for the third quarter ended Sep 30, 2026.

Financial Summary

(In NT$M except EPS and percentage)	3Q26	2Q26	QoQ	3Q25	YoY
Net Sales	18,755	13,896	35%	8,613	118%
NRE & IP	2,084	2,310	-10%	2,859	-27%
Turnkey	16,671	11,586	44%	5,754	190%
Gross Profit	3,861	2,994	29%	2,086	85%
Gross Margin	20.6%	21.5%	-0.9PPT	24.2%	-3.6PPT
Operating Expense	1,309	1,318	-1%	1,031	27%
Income from Operations	2,552	1,676	52%	1,055	142%
Operating Margin	13.6%	12.1%	+1.5PPT	12.2%	+1.4PPT
Net Income	2,272	1,555	46%	867	162%
Net Profit Margin	12.1%	11.2%	+0.9PPT	10.1%	+2.0PPT
EPS (NT$)	16.95	11.61	46%	6.47	162%

Topics in This Report:

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

Financial Highlights:

3rd Quarter 2026

- Net Sales was NT$18,755 million, which increased 35% compared to 2Q26 and also increased 118% from 3Q25.
- In 3Q26, NRE & IP revenue was NT$ 2,084 million, decreasing 10% QoQ and decreasing 27% YoY. Turnkey revenue was NT$16,671 million, which increased 44% QoQ and also increased 190% YoY.
- Gross Margin was 20.6%, which is 0.9 percentage points lower than 2Q26 and 3.6 percentage points lower than 3Q25. A higher proportion of Turnkey in our product mix was the primary factor impacting this quarter's gross margin.
- Operating Margin was 13.6%, increasing 1.5 percentage points from 2Q26 and 1.4 percentage points from 3Q25. Benefited from revenue growth significantly outpacing operating expense growth.
- Net Margin was 12.1%, 0.9 percentage points higher than 2Q26 and 2.0 percentage points higher than 3Q25. Primarily driven by FX gains this quarter compared to FX losses in the prior year's same period.
- EPS was NT$16.95, which increased 46% compared to 2Q26 and increased 162% from 3Q25.

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Revenue Analysis

● By Segment

NRE & IP by Technology	3Q26	2Q26	3Q25
	%	%	%
3nm & Below	20%	13%	37%
5nm	36%	46%	28%
7nm	23%	24%	23%
16nm & Above	21%	17%	12%
Total	100%	100%	100%
Turnkey by Technology	**3Q26**	**2Q26**	**3Q25**
	%	%	%
3nm & Below	59%	59%	24%
5nm	12%	5%	25%
7nm	6%	9%	9%
16nm & Above	23%	27%	42%
Total	100%	100%	100%

We recognize NRE revenue each quarter in accordance with the design milestones achieved for each individual project.
By segment, combined 7nm and below accounted for 79% of total NRE & IR revenue in 3Q26.

3nm& Below Turnkey revenue contribution started in 4Q24.
3nm & Below accounted for 59% of total Turnkey revenue in 3Q26, mainly from Cloud application projects. By segment, combined 7 nm and below accounted for 77% of total Turnkey revenue in 3Q26.

● By Technology/Region

Net Sales by Technology	3Q26	2Q26	3Q25
	%	%	%
3nm & Below	55%	51%	29%
5nm	14%	12%	26%
7nm	8%	12%	13%
16nm & Above	23%	25%	32%
Total	100%	100%	100%
Net Sales by Application	**3Q26**	**2Q26**	**3Q25**
	%	%	%
Cloud	86%	79%	65%
Consumer	7%	8%	20%
Edge AI	3%	7%	10%
Automotive	1%	3%	2%
Others	3%	3%	3%
Total	100%	100%	100%
Net Sales by Reigon	**3Q26**	**2Q26**	**3Q25**
	%	%	%
Taiwan	11%	12%	10%
USA	74%	68%	69%
China	10%	8%	11%
Japan	3%	5%	7%
Korea	2%	4%	2%
Europe	0%	3%	1%
Total	100%	100%	100%

By technology, 7nm and below revenue contribution of total revenue in 3Q26 was 77%. 3nm & below accounted for 55% of total revenue, mainly from Turnkey revenue.

Starting from 4Q25, GUC total revenue is reclassified into Cloud, Consumer, Edge AI, Automotive , and Others. The Cloud category accounted for 86% of total revenue in 3Q26, continuing its upward trend. Revenue in this category in 2026 primarily comes from CPU、AI accelerators、and BMC projects.

From a geographic perspective, revenue from Taiwan, China and USA totally accounted for 95% in 3Q26. Revenue from USA accounted for 74% this quarter, mainly from TK revenue of Cloud application.

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Gross Margin Analysis

(In NT$M except percentages)	3Q26 Amount	3Q26 % of net sales	2Q26 Amount	2Q26 % of net sales	3Q25 Amount	3Q25 % of net sales
Cost of sales	14,894	79.4%	10,902	78.5%	6,527	75.8%
Gross profit	3,861	20.6%	2,994	21.5%	2,086	24.2%

Gross margin rate was 20.6% in 3Q26, lower than 21.5% in 2Q26 and also lower than 24.2% in 3Q25.
A higher proportion of Turnkey in our product mix was the primary factor impacting this quarter's gross margin.
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Expenses Analysis

(In NT$M except percentages)	3Q26 Amount	3Q26 % of net sales	2Q26 Amount	2Q26 % of net sales	3Q25 Amount	3Q25 % of net sales
SG&A Exp	271	1.5%	271	2.0%	218	2.5%
R&D Exp	1,038	5.5%	1,047	7.6%	813	9.5%
Total operating expenses	1,309	7.0%	1,318	9.6%	1,031	12.0%

Total operating expenses in 3Q26 represented 7.0% of net sales.
From the perspective of dollar amount, operating expense remained roughly flat compared to the previous quarter.
Because of Turing Center depreciation expense, 2026 operating expenses are projected to increase significantly compared to 2025.

Net Profit & EPS

(In NT$M except EPS)	3Q26 Net Income	3Q26 EPS (NT$)	2Q26 Net Income	2Q26 EPS (NT$)	3Q25 Net Income	3Q25 EPS (NT$)
	2,272	16.95	1,555	11.61	867	6.47

Net income in 3Q26 was NT$2,272 million and EPS was NT$16.95, which increasing 46% from 2Q26 and increasing 162% on YoY basis.

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Financial Condition Review

● Liquidity Analysis

Unit: NT$M

	9,30,2026	6,30,2026	9,30,2025
Assets			
Cash and cash equivalents	8,947	10,034	8,043
Accounts receivable, net	7,731	3,933	2,035
Inventories	20,542	14,540	9,422
Other current assets	5,676	5,366	6,978
Total current assets	42,896	33,873	26,478
Property, plant and equipment	2,178	2,216	1,077
Other non-current assets	1,194	1,296	1,262
Total assets	46,268	37,385	28,817
Liabilities			
Current liabilities	30,144	23,386	16,508
Non-current liabilities	393	534	601
Total liabilities	30,537	23,920	17,109
Equity			
Total equity	15,731	13,465	11,708
Total liabilities and equity	46,268	37,385	28,817
Net working capital	12,752	10,487	9,970
Current ratio(%)	142	145	160

As of September 30, 2026, total assets stood at NT$46,268 million and total liabilities were NT$30,537 million. Notably, both inventory and contract liabilities increased compared to the previous quarter, maintaining an upward trend throughout 2026. The continuous accumulation of inventory is primarily to support subsequent shipments, while the average days sales of inventory decreased quarter-over-quarter.

● Receivable and Inventory

	3Q26	2Q26	3Q25
A/R turnover days	28	29	19
Inv. turnover days	107	119	109

Days of A/R turnover and Inv. turnover in 3Q26 were 28 days and 107 days, respectively. Both decreased compared to the previous quarter.

Cash flow analysis

Unit: NT$M

	3Q26	2Q26	3Q25
Cash flows from operating activities:	(972)	3,477	(576)
Cash flows from investing activities:	(229)	1,582	1,905
Cash flows from financing activities:	123	(2,705)	(19)
Effect of exchange rate changes on cash and cash equivalents	(9)	8	38
Net increase (decrease) in cash and cash equivalents	(1,087)	2,362	1,348
Cash and cash equivalents, beginning of period	10,034	7,672	6,695
Cash and cash equivalents, end of period	8,947	10,034	8,043

During the quarter, operating activities resulted in a net cash outflow of NT$971 million, primarily driven by a significant increase in inventory. Net cash outflow from investing activities was NT$229 million, mainly due to the acquisition of money market funds. Net cash inflow from financing activities totaled NT$122 million, primarily reflecting an increase in short-term borrowings to meet operational needs.

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GLOBAL UNICHIP CORP. (GUC) is the Advanced ASIC Leader™ whose customers target IC devices to HPC(High Performance Computing), Communication Connectivity, Automotive and Consumer applications. Based in Hsin-chu, branch in Taipei 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) for details.

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