



Elitegroup Computer Systems (ECS) Investor Conference – Q1 2026



- Introduction to Elitegroup Computer Systems (ECS)
- PC/NB Trends and Outlook for 2026
- Q1 2026 Financial Results
- H1 2026 Outlook
- ECS Future Development Strategy
- Appendix I: Macroeconomic Trends and Risk Management
- Q&A and Discussion



Elitegroup Computer Systems (ECS) –
Established in 1987

Chairman: Mr. Jung-Hua Chang
President: Mr. Yu-Pin Weng



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President: Mr. Yu-Pin Weng

Product Scope



38 Years of history up to the present

Founded in 1987 with a focus on the motherboard business. Through years of deep cultivation, ECS has continuously expanded its PC-related product lines, step-by-step



Establishing a comprehensive and diversified product portfolio

4500 Employees

With a solid foundation in global deployment for many years, we have established operational bases worldwide, forming a comprehensive and competitive international network

PCB	Motherboard	Desktop	Notebook
<ul style="list-style-type: none"> 2~16 ML HDI Board Server Board Automotive Board 	<ul style="list-style-type: none"> Consumer Type Commercial Type Industrial Type Gaming Category Display Card 	<ul style="list-style-type: none"> Commercial Type High-End Type Gaming Category Thin Client PC All-in-One 	<ul style="list-style-type: none"> Commercial Type Education Category 2-in-1 Chromebook



2026 Global PC Market in a Phase of Demand Restructuring and Supply Chain Reshaping

01. Geopolitical & Supply Chain Shifts

Trump Tariff Impact

- Tariff uncertainty forces brand manufacturers to adopt more conservative strategies.
- Tariff-driven retail price increases in the US market will suppress market demand.

Supply Chain Reshaping

- ICT supply chain migration accelerates, though progress needs monitoring.
- Countries focus on technological autonomy and localized critical component development.

02. AI Computing Architecture Competition

AI End-Device Demand Emerges

- AI PCs are maturing, expected to drive replacement and hardware spec competition.
- AI server and data center demand crowds out consumer electronics capital expenditure.

Market Competition Intensifies

- NVIDIA confirms return to Arm-architecture PC market.
- Apple to reshape market with entry-level MacBook Neo.

03. Component Shortages

Memory Supply-Demand Imbalance

- AI server demand crowds out consumer electronics memory capacity; memory shortage extends price increase effects.

IC Supply Shortage

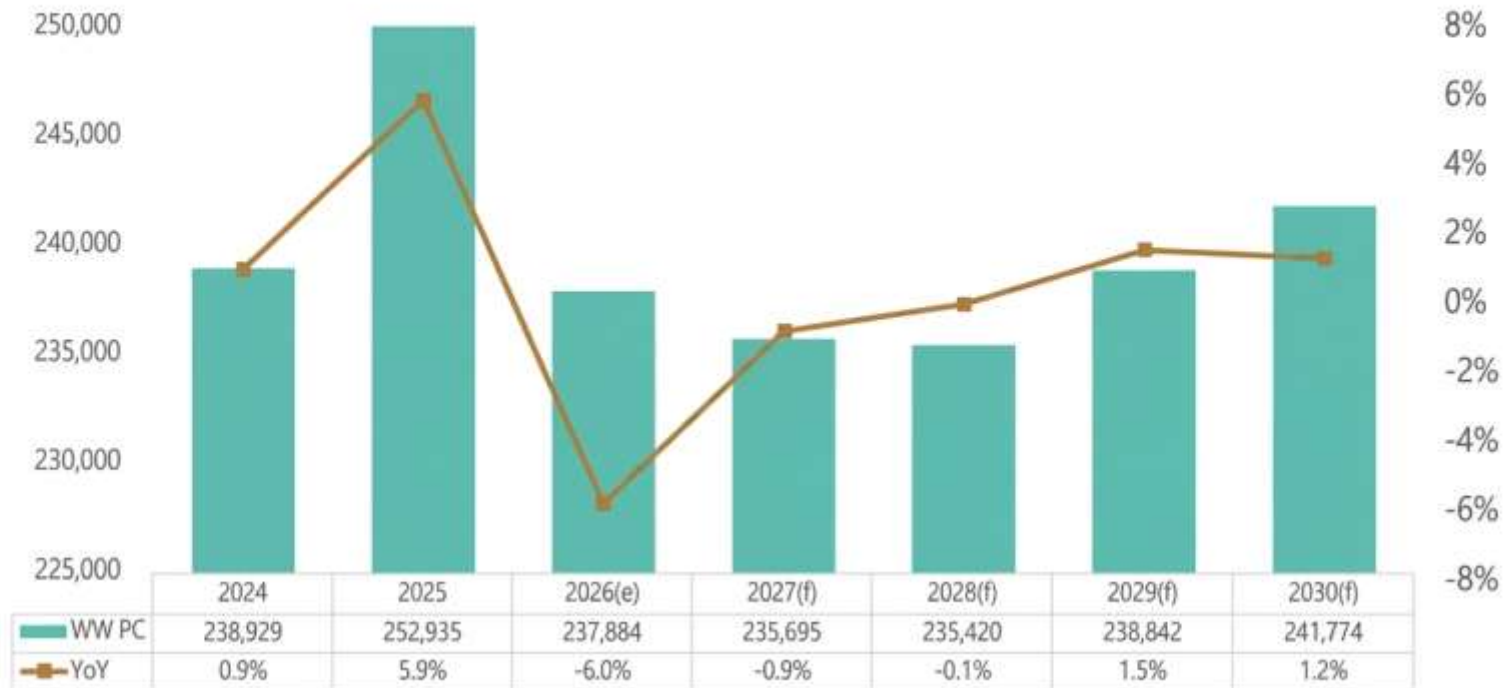
- Entry-level CPU supply is insufficient, facing supply-demand mismatch.
- Resource crowding out appears in some peripheral ICs and PCB substrates, leading to cost increases.



The Global PC Market Faces Dual Pressures of Weak Demand and Rising Costs in 2026

- In 2026, enterprise capital expenditure (CAPEX) is expected to become more conservative. IT budget allocations will focus more on infrastructure like cloud and AI data centers. Furthermore, sustained memory price increases will drive up the final prices of endpoints like laptops and desktops. Consequently, PC shipments are forecast to decline by 6%, reaching approximately 238 million units. Overall revenue is expected to be flat or decline slightly.

Global PC Market Forecast (2024-2030)



資料來源：MIC，2026年3月



Supply and Demand Pressure Causes Global NB Market to Decline 6%

- Global NB market faces price hike pressures for CPUs and memory on the supply side, while the demand side faces uncertainty from conflict-driven inflation. The c NB market is expected to decline 6%, reaching approximately 170 million units.
- 2026 will test brand inventory and supply chain management capabilities. Apple is expected to use Macbook Neo to increase its penetration in the entry-level market.

Global NB Market Forecast (2024-2030)



2025~2026 Global Laptop Brand Manufacturer Market Share





DEMONSTRATING RESILIENCE AMIDST HEADWINDS, DRIVING GROWTH WITH DISCIPLINE

Elite Computer Systems (ECS)
June 26, 2026

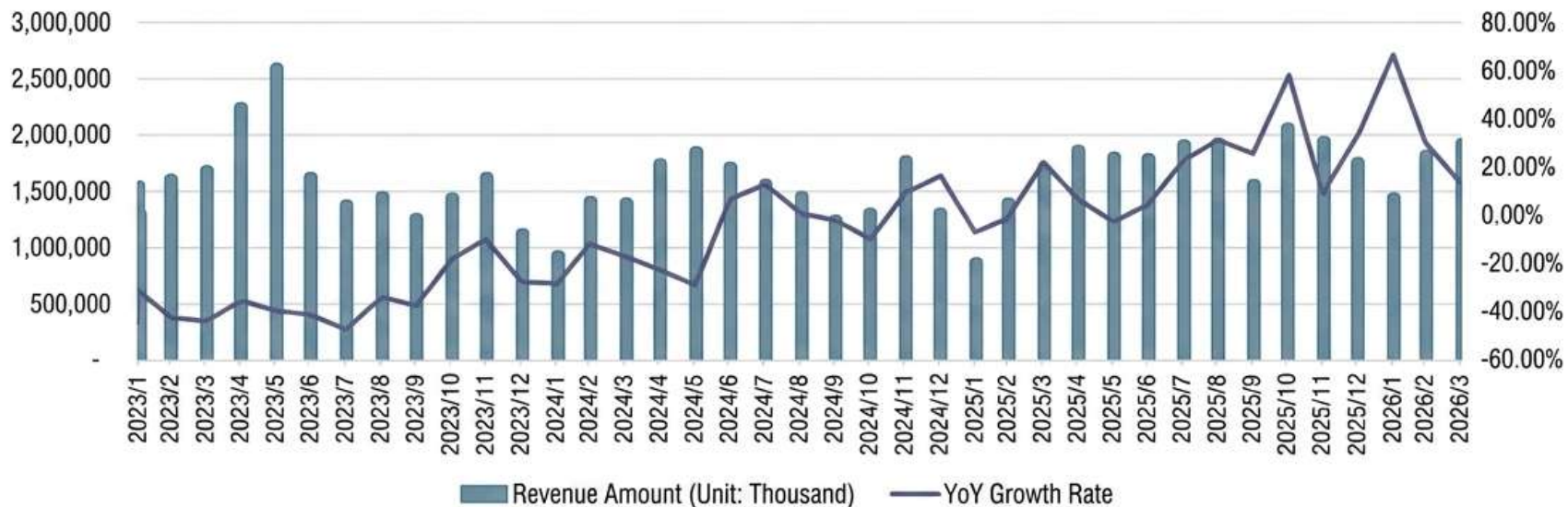




Consolidated Revenue Trend

Unit: NTD Thousand

ECS Consolidated Monthly Revenue



Year / Month	Revenue			
	Current Revenue	MoM %	Same Month Last Year Revenue	YoY %
2026/04	1,925,310	6.05	1,703,170	13.04
2026/03	1,815,423	26.39	1,387,561	30.83
2026/02	1,436,346	-17.97	860,663	66.96
2026/01	1,751,101	-9.57	1,306,652	34.01



CONSOLIDATED STATEMENT OF COMPREHENSIVE INCOME

Unit: NTD in Thousands

	Q1 2026		Q1 2025		Growth Rate
	Actual		Actual		
	Amount	%	Amount	%	
Sales Revenue	5,002,870	100.00%	3,554,476	100.00%	40.75%
Cost of Goods Sold	4,568,063	91.31%	3,036,729	85.43%	50.43%
Gross Profit	434,807	8.69%	517,747	14.57%	(-16.02%)
Operating Expenses	413,297	8.26%	561,585	15.80%	-26.41%
Operating Income	21,510	0.43%	(43,838)	-1.23%	149.07%
Non-Operating Income (Expenses)	66,687	1.33%	848,248	23.86%	-92.14%
Income (Loss) Before Tax	88,197	1.76%	804,410	22.66%	-89.04%
Non-Controlling Interests	(4)	0.00%	(143)	0.00%	97.04%
Income Tax Expense	25,640	0.51%	233,362	6.57%	-89.01%
Net Income (Loss)	62,561	1.25%	571,191	16.06%	-89.05%
EPS	0.11		1.02		



Financial Ratios

Period	2026.1.1~ 2026.3.31	2025.1.1~ 2025.12.31	2025.1.1~ 2025.3.31
Debt Ratio	52.30%	52.85%	50.42%
Current Ratio	138.69%	136.81%	129.31%
Quick Ratio	111.71%	114.06%	108.29%
A/R Turnover Days(1)	46.49	51.04	63.48
Inventory Days(2)	58.40	51.19	72.56
A/P Turnover Days(3)	70.33	67.10	92.64
Cash Conversion Cycle(1)+(2)-(3)	34.56	35.13	43.40
Return on Equity (Ann.)	2.31%	6.99%	19.56%
Earnings Per Share	0.11	1.41	1.02
Book Value Per Share	19.55	19.31	20.80



Q1 2026 FINANCIAL SUMMARY



■ Core Growth Memtum : Desktop & Mini PC Dual Engine

Desktop : Benefiting from to rising component cosised selling price and unit shipment growth, contributing to NT\$ 0.57 billion revenue increase.

Mini PC : Showing explosive growth, Q1 contributed to NT\$ 1.07 billion revenue increase preparing for mass shipment in 5ay, and momentuy, and mom continues.

■ Gross Margin Pressure, Optimization

Gross margin declined by coss margin by 16.02% (NT\$ 0.08 billion) YoY.

External factors material costs and RMB appreciatedy ufor unianrentobe differences.

Q1 Expense Change: Through strongl control, expensed by 26.4% (NT\$ 0.15 billion) YoY.



Outlook & Guidance: Laying the Foundation for H1 2026 Profitability

- **Summary:** Despite facing significant pressure from year-over-year profitability declines in certain product lines, the entire company was still able to maintain steady profitability in H1, mindting profitability the success of our core business transformation and bottom-line resilience.
- **Revenue Expectations:** We expect Q2 revenue to trend relatively flat compared to Q1, primarily reflecting our agile adjustments to the product mix.



ECS Future Development Strategy - Edge AI

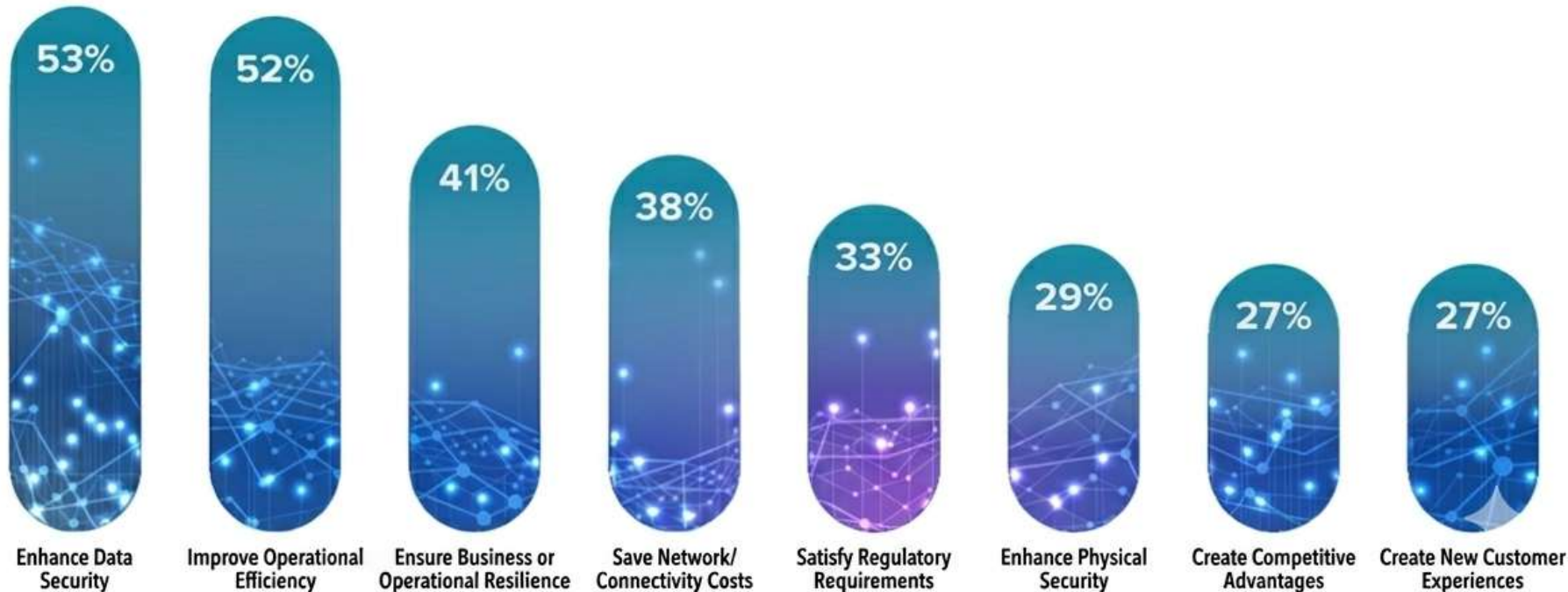
ECS (ECS) | Precision Management ~ Resilient Growth



Edge AI Development: An Inevitability

- Introducing AI applications increases awareness of data transmission costs and data privacy challenges. In general, processing and storing data at the edge, where data is generated, is more cost-effective. Many new AI-assisted use cases demand high performance, low latency, and nearly real-time execution speeds, which can only be achieved through edge infrastructure.
- Edge computing enhances data security, operational efficiency, and business resilience.

What have your organizations gained from edge investments?





Building Affordable Edge AI, with Hardwergration and Domain Landing Strategy

Pioneering On-Premise AI Transformation Solutions

ECS is committed to breaking out of the contract manufacturing red targeting corporate-owned “Edge Sovereign AI” as a rigid demand. We reshape corporate value through three core strategies.

01

Form Factor Innovation

Tower-style Host with Server-Grade Architecture.
Server-room-free, plug-and-play.
Breaks traditional server deployment limitations.

02

Hardwergration

Deeply integrated software and hardware, connecting industrial ecos. Introduced advanced flash memory collaborative computing, flexible computing power optimization. Showcases high-level LLM efficiency with entry-to-mid-level hardware. Significantly reduces the barrier to entry, with hardware procurement cost potentially reduced by over 70%.

03

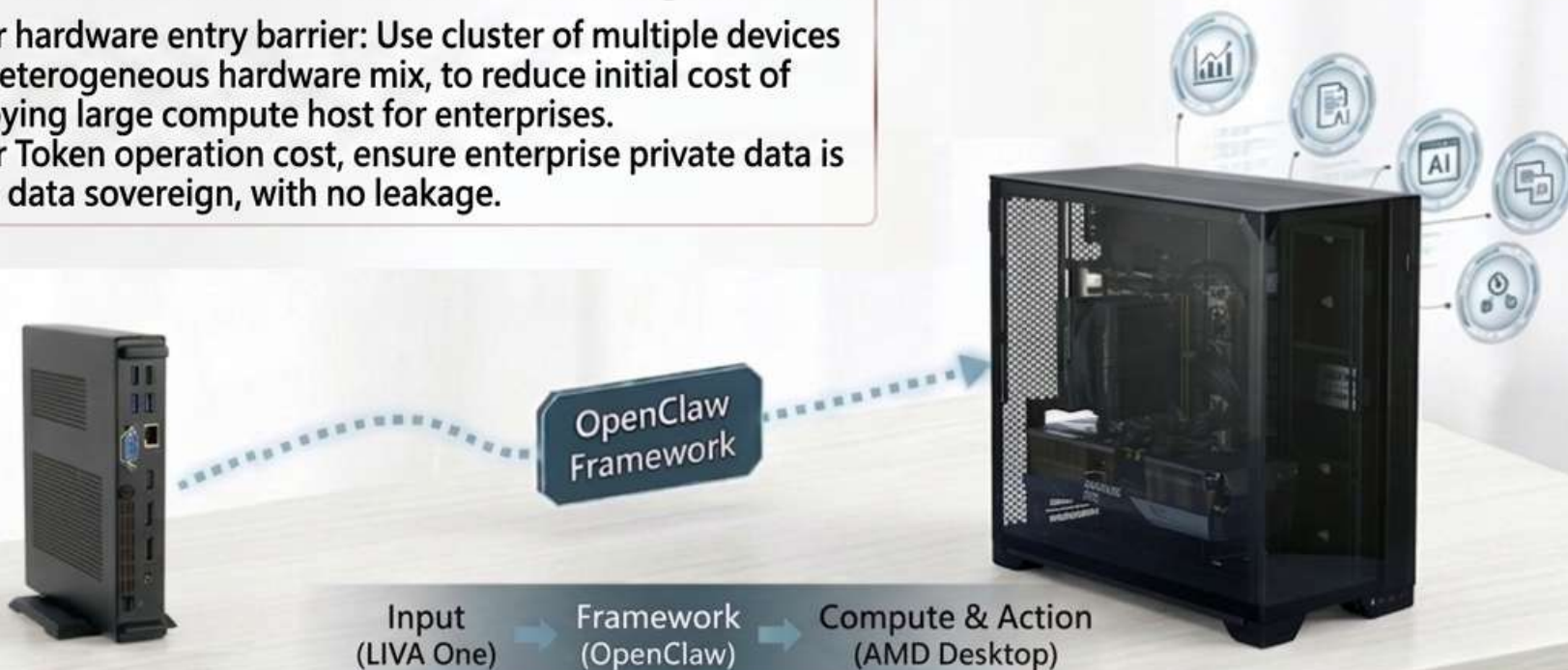
Domain Landing

Integrates group ecosystem circles, directly targeting vertical niche markets.
Combines Datong Medical and Tatung Sceitech channels.
Promotes solutions-based sales and rapid monetization.



Hybrid Claw Hardware-Software Co-design Architecture

- Lower hardware entry barrier: Use cluster of multiple devices and heterogeneous hardware mix, to reduce initial cost of deploying large compute host for enterprises.
- Lower Token operation cost, ensure enterprise private data is 100% data sovereign, with no leakage.



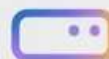
Edge Compute Cluster-based 分工, low-cost enterprise-grade AI Agent Solution



Edge AI Processing (Mini PC - LIVA ONE)

- Responsible for Natural Language input & initial data processing
- Fast response, saves bandwidth
- Edge-level primary compute capability

Low power, energy-saving advantage, 24-hour maintenance of OpenClaw Agent in a resident state.



High-Performance Core Compute (Workstation)

- Responsible for complex AI inference & generation tasks
- Big Data processing, model execution
- OpenClaw accelerated computing

Deployment of Core Large Language Model (LLM) at the edge, using local orchestration tools for deep data processing, final final output for commercial results.

Creating Private On-Premise AI Knowledge Bases for All Industries

- **100% Data Security Protection** - Targets highly sensitive, high-asset industries, providing an on-premise secure search environment where data completely does not go to the cloud and is not leaked.
- **Reduces 80% Enterprise Entry Barrier** - Uses aiDAPTIV+ technology to eliminate the burden of purchasing expensive AI servers, greatly accelerating willingness for multi-node flexible deployment and full-machine conversion by enterprises.

aiDAPTIV+ Compute Acceleration



Universally Applicable Across all Industries - Fast implementation for industries with high confidentiality requirements such as finance, legal, human resources (HR), advanced manufacturing, retail, etc.



Partner with Tatung Medical to Build Medical Edge Monitoring & FHIR Transformation Platform 18

- **Dialysis Machine Peripheral Monitoring Module:** Uses LIVA Z11 PLUS mini PC as the edge device in the medical field to perform dialysis machine monitoring and real-time data flow processing, and through edge-end models, performs real-time status monitoring for peripheral device operation.
- **FHIR BOX Data Format Transformation:** Uses LIVA Z11 PLUS mini PC on the edge land side to directly transform to the international standard FHIR format, effectively breaking through closed walls between different care institutions and management systems, acid data integration.



- Layout in healthcare, long-term care and medical peripheral monitoring market, accelerates implementation of Edge AI care products.
- FHIR is a global medical care data interoperability trend; ECS solution has high cross-domain replicability and overseas healthcare market opportunities.



Q&A

Thank you for your participation, and please feel free to share your feedback!

Elitegroup Computer Systems (ECS) IR Team

