



Semiconductor Biz Insight

Your 5 minute monthly e-link digest brought to you by VLSI Consultancy

December 2011 Issue

Your monthly digest which aims to provide you a round up of the semiconductor headlines with a special focus to the Asian arena - direct to your inbox. Simply click on the relevant links provided to get the details.

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Hi,

Snippets from this month

This month saw Korea's SK Telecom bidding for Hynix. A successful offer will give the carrier control of the world's second-largest memory-chip maker and entry into the \$39-billion-a-year market for computer-memory chips dominated by Samsung Electronics.

Ripples from the recent floods in Thailand include a potential acceleration of the transition to SSD, a likely move of investments of the country's biggest foreign investors, Japanese, into Indonesia and Vietnam and seeking of a government grant of 64.12 million worth of funds to help rehabilitate the local HDD industry by the country's Hard Disk Drive Institute (HDDI)

There has been mixed news about the financial state amongst Asian companies – While Spreadtrum's quarterly results beat estimates, MediaTek saw its October revenues slip. TSMC approved a capex bump (about \$1,061.4 million) for advanced fab technology and Samsung became the biggest smartphone vendor in the world during the third quarter.

On a positive note, TSMC and STMicroelectronics, with a caution caveat, see signs of market turning up.

Acquisition of the month – Synopsys to buy Magma. Is it to “expand the R&D talent pool” or leverage on Magma's strength in analog custom IC EDA? Either way, consolidation continues.

Let me end this note with a fab joke picked up from a [blog post](#) by David Manners (of Electronics Weekly).....

Fab heaven is where the machinists are Japanese, the R&D is done by the British, the IC design is done by the Indians, the canteen is run by the French, HR is run by the Swedes, the management is Taiwanese, customer service is done by Italians and the marketing is done by Americans.

Fab hell is where the customer service is done by Germans, marketing is done by Belgians, HR is run by the Chinese, the canteen is run by the British, the machinists are French, the management is Indian, the R&D is done by the Irish and the IC design is done by Australians.

If you have any thoughts on the semiconductor news & would like to share them with me and your industry colleagues through this e-newsletter, please email me at meenu@asic-vlsi.com.

Enjoy the festive month ahead!

Best Regards

Meenu

Ps: If you see a need for

- ✓ *Training for your engineers (pl. visit <http://asic-vlsi.com/training.html> for a list of offerings)*
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LOCAL ASIA-PACIFIC NEWS

[Micron: Thailand causing demand pick-up for SSDs](#)

Source: Brooke Crothers, Cnet – 30th November 2011

Micron Technology, one of the largest flash memory chip manufacturers in the world, said that the solid-state drive industry has seen orders spike.

[Genesis Photonics sets ambitious goal for LED operation in Taiwan](#)

Source: CENS.com – 28th November 2011

Genesis Photonics Chairman K.J. Chong has recently pledged that his company will become “MediaTek Inc.” of Taiwan’s LED industry, suggesting his company’s goal of becoming No.1 supplier of innards of LED lamps in a single package as MediaTek being the No.1 supplier of mobile phone chipsets.

[MyLED invests in LED manufacturing plant in Malaysia](#)

Source: LEDs Magazine – 28th November 2011

MyLED Group, a Malaysia-based solid-state lighting (SSL) manufacturer has signed memorandums of understanding (MoUs) with six OEMs from Germany, Japan, Taiwan and Malaysia. Three of the OEMs – Amprex International Sdn Bhd (Japan), Light-Trend Optoelectronics Technology Co., Ltd (Taiwan) and Osram Opto Semiconductors (Germany) – will also provide MyLED with technology and expertise in research & development.

[HP is the top spender in Taiwan](#)

Source: TechEye – 28th November 2011

Taiwan's Ministry of Economic Affairs has revealed that the top spender for the

KEY TAKE-AWAY

From the Asian arena

Malaysia firms up position as largest solar panel maker, Thailand’s HDDI seeks funds for its HDD biz recovery and Samsung becomes biggest smartphone vendor in Q3.

Quarterly results and financial outlook

Some ups: Spreadtrum, Nvidia, Synopsys
And some downs: MediaTek, AMD, Nokia-Siemens, LTX-C, Applied Materials

Acquisitions

Synopsys to buy Magma, ARM acquires Prolific, Gentex acquires Intersense, Qualcomm buys the HaloIPT team, SK Telecom bids for Hynix and Huawei buys out Symantec out of JV

country's products is inkjet churn-house HP. The ministry also gave a nod and a pat on the back to technology bigwigs like Nvidia and Qualcomm. Taiwan was happy for them to be investing in local semiconductor companies.

[Short lead time orders from China buoying revenues for IC design firms](#)

Source: Cage Chao, Jessie Shen, Digitimes – 28th November 2011

Taiwan-based fabless IC firms have received an influx of short lead-time orders from clients in China recently, according to industry sources. The pull-in of orders, mainly for smartphones and tablet PCs, will buoy the chip suppliers' revenue performance.

[Panasonic plans 300mw Malaysian solar factory](#)

Source: PV magazine – 25th November 2011

Panasonic Energy Malaysia is set to start work on the new facility, located in Kulim Hi-Tech Park, Kedah, this December. It has said it will manufacture both its HIT modules, and work on integrated production of photovoltaic wafers, cells and modules.

[Qualcomm MEMS display launched in Korean e-readers](#)

Source: Electroiq – 24th November 2011

Qualcomm MEMS Technologies (QMT), a wholly owned subsidiary of Qualcomm and Kyobo Book Centre of Korea launched the first e-reader using mirasol display technology. The Kyobo e-Reader features a 5.7" XGA format mirasol display (screen resolution of 223 ppi) and Qualcomm's 1.0 GHz Snapdragon S2 class processor. Kyobo's custom application interface sits atop an Android 2.3 base.

[Thailand needs \\$64m to restore HDD industry](#)

Source: EE Times – 23rd November 2011

Thailand's Hard Disk Drive Institute (HDDI) is asking the government for \$64.12 million (2 billion baht) worth of funds to help accelerate the rehabilitation of the country's HDD industry, according to a report by the Bangkok Post. The fund the institute is asking is ten times more than what it usually receives.

[Schweizer enters PV market with 4 fab lines in Asia](#)

Source: Electroiq – 22nd November 2011

PCB maker Schweizer Electronic AG has started 4 photovoltaic cell and module manufacturing lines, starting its diversification of business strategy into solar energy products.

[ARM opens Taiwan R&D centre in Hsinchu](#)

Source: Peter Clarke, EE Times – 18th November 2011

The focus of the design centre will be on physical IP development and processor implementation support for Cortex processors and Mali graphics processors. The centre is working on 28-nm and 20-nm technologies for Cortex A-series processors

[Foundries extend reach into packaging fronts](#)

Source: Mark LaPedus, SemiMD – 18th November 2011

Taking another step in the IC-packaging market, TSMC outlined its 2.5D chip interposer strategy, saying it would provide a turnkey solution for customers. Its interposer strategy, dubbed Chip-on-Wafer-on-Substrate (CoWoS), is providing an end-to-end solution including all of the traditional assembly and test steps handled by the IC packaging houses.

[TowerJazz targets India's emerging semiconductor market](#)

Source: Euroasia Semiconductor – 18th November 2011

TowerJazz has announced that it has signed a non-exclusive MoU with a European entity to seek process transfer opportunities and projects in India and Brazil. TowerJazz will supply training, manufacturing know-how, project management and technical support and its partner will supply the intellectual property licenses, supporting services and training.

[Malaysia firming up position as largest solar panel maker](#)

Source: The Star – 16th November 2011

With incentives such as a 15-year tax holiday for solar company profits, low interest rates and good infrastructures like the Kulim Hi-Tech Park, Malaysia has become a favoured destination for foreign direct investments, said Deputy Minister of International Trade and Industry Datuk Mukhriz Mahathir

[Huawei launches world's first cloud phones in India](#)

Source: Rediff.com – 16th November 2011

The telecom equipment maker launched its much-awaited tablet PC 'MediaPad' and two handsets 'Sonic' and 'Ideos X3' offering cloud services to strengthen its product portfolio in India.

[Samsung becomes biggest smartphone vendor, as Android's market share grows](#)

Source: Mikael Ricknas, IDG News – 15th November 2011

As per Gartner's report, Samsung became the biggest smartphone vendor in the world during the third quarter, and Android's market share has surpassed 50 percent for the first time.

[Thai floods may shift Japan investment to Indonesia, Vietnam](#)

Source: Yumi Teso and Daniel Ten Kate, Bloomberg – 15th November 2011

Japanese companies, Thailand's biggest foreign investors, may spend more to build factories in neighbors including Indonesia and Vietnam after the worst flooding in 70 years disrupted global production.

[Thai floods delay Toshiba's facility sale to Amkor](#)

Source: Electroiq – 14th November 2011

Toshiba and Amkor have jointly agreed to postpone discussions regarding the

previously announced proposed acquisition by Amkor of Toshiba's semiconductor assembly operation in Malaysia.

[Boston Semi Equipment brings fab equipment leasing to Japan](#)

Source: Marketwire – 11th November 2011

Boston Semi Equipment LLC (BSE Group) established Boston Semi K.K. in Tokyo, Japan, for customers of its flexible financing on front-end and back-end semiconductor manufacturing equipment.

[Thai floods to speed up transition to SSD](#)

Source: Sylvie Barak, EE Times – 10th November 2011

The Taiwanese hardware and component channel could be badly hit as a result of the crippling floods in Thailand which have resulted in hard disk drive (HDD) shortages globally, though the move could speed up the transition to solid state drives (SSDs), according to sources

[Micron to develop MRAM in Singapore](#)

Source: Richard Wilson, Electronics Weekly – 8th November 2011

As part of the collaboration, Micron and Singapore's A*STAR Data Storage Institute (DSI) will invest in joint research to develop high-density STT-MRAM devices during the next three years. Researchers from both Micron and DSI will work together to develop high-density STT-MRAM devices.

[China lights up LED roadmap: Taiwan leaders seek similar support](#)

Source: James Montgomery, Electroiq – 7th November 2011

China's National Development and Reform Commission (NDRC) has laid out its plans to phase out incandescent lamps within five years, seen as providing important visibility into the nation's burgeoning market for LEDs

[DuPont AMOLED display maker's interest](#)

Source: Electroiq – 2nd November 2011

DuPont has signed a technology licensing agreement with a leading Asian manufacturer of active matrix organic light emitting diode (AMOLED) display products. The display maker will use DuPont process technology to make large AMOLED television displays at significantly lower cost than alternative technologies.

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INDUSTRY HEADLINES

[Manufacturing bombshell: AMD cancels 28nm APUs, starts from scratch with TSMC](#)

Source: Joel Hruska, ExtremeTech – 22nd November 2011

The implications and financial repercussions could be enormous. Moving 28nm APUs from GlobalFoundries to TSMC means scrapping the existing designs and laying out new parts using gate-last rather than gate-first manufacturing.

[Qualcomm unveils new Snapdragon mobile processors across all tiers of smartphones and tablets](#)

Source: MarketWatch – 16th November 2011

Qualcomm announced the expansion of its Snapdragon S4 class of next-generation mobile processors and the enhancement of its Snapdragon S1 solutions for entry-level smartphones.

[Nvidia's ARM chips power supercomputer](#)

Source: Brooke Crothers, Cnet – 14th November 2011

The company's Tegra chips will for the first time power a supercomputer--more evidence that ARM is moving on up into Intel territory

[Nokia partners with ST-Ericsson for cheaper Windows phones](#)

Source: Sara Yin, PCMag.com – 2nd November 2011

Nokia has added ST-Ericsson to its roster of chipmakers for Windows Phone devices, which currently only includes high-end Snapdragon chipmaker, Qualcomm.

[Silex MEMS TSV tech licensed to Nanoshift](#)

Source: PRNewswire – 2nd November 2011

MEMS foundry Silex Microsystems licensed its Silex Sil-Via through-silicon-via (TSV) packaging platform to Nanoshift for use in early development of complex MEMS products

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FINANCIAL WATCH

[Weak demand, strong yen forces Toshiba to slash chip output](#)

Source: TechEye – 30th November 2011

Toshiba is shutting down chip making facilities in Japan and cut output elsewhere as demand slumps. The chip plants for the chop are for discrete chips. Three of the semiconductor factories are due to be slashed at the start of April 2012.

[Planned job cuts arrive in AMD Singapore](#)

Source: EE Times – 29th November 2011

The semiconductor maker laid off about 70 jobs at its Chai Cheeÿ plant in Singapore, in line with the [restructuring plans](#) announced early this month aimed

at saving more than \$200 million in operational expenses by 2012.

[Nokia Siemens said to seek 1.5bn Euro forward-start loan](#)

Source: Patricia Kuo, Bloomberg – 28th November 2011

The borrowing for the network-equipment venture of Nokia Oyj and Siemens AG becomes effective in June to replace a 2 billion-euro credit line.

[Elpida to sell unit stake to Taiwan partner](#)

Source: Reuters - 25th November 2011

Japan's biggest maker of DRAM chips agreed to sell preferred stock in its unit EBS to Taiwanese semiconductor company Walton Advanced Engineering for 3.75 billion yen (\$48.27 million), the Nikkei said

[Nokia Siemens Networks to cut 17000 jobs](#)

Source: Reuters – 23rd November 2011

The world's second largest maker of mobile phone network equipment is to axe 17,000 jobs, nearly a quarter of its workforce, to help save about 1 billion euros (\$1.35 billion) a year.

[LTX-C posts a wider than expected quarterly loss](#)

Source: ATE Forum – 22nd November 2011

LTXC posted quarter sales of \$33.75 million, down from \$62.7 million a year ago. Results were worse than expected as the Street was looking for \$37.1 million.

[Applied Materials reports fourth quarter and fiscal year 2011](#)

Source: Thomson Reuters – 16th November 2011

In the fourth quarter, Applied generated orders of \$1.60 billion, net sales of \$2.18 billion and operating income of \$361 million. Fourth-quarter net income was \$456 million or 34 cents per share.

[Buffet makes rare investment in tech sector with IBM](#)

Source: Marlene Satter, AdvisorOne – 16th November 2011

Although he normally shuns tech stocks, Warren Buffett, head of Berkshire Hathaway, veered from his usual policy and sank close to \$11 billion into shares of IBM, picking up a stake of almost 5.5% that makes him potentially its biggest shareholder. Currently that position is held by State Street Global Advisors.

[Chipmaker Nvidia's quarterly results beats Street](#)

Source: Noel Randewich, Reuters – 11th November 2011

Nvidia's third-quarter results beat estimates as the chipmaker refocused on smartphones and tablets in a tepid personal computer market, although its revenue forecast was a bit lower than expected.

[MediaTek's October revenue slips 4.9% MoM](#)

Source: CENS – 11th November 2011

MediaTek raked in consolidated revenue of NT\$7.5 billion (US\$251 million at US\$1: NT\$30) in October, slipping 4.9% from a month earlier and representing another fall in three straight months, according to company sources.

[TSMC's October unconsolidated revenue slips 0.3%](#)

Source: Aries Poon, MarketWatch – 10th November 2011

TSMC said that its unconsolidated revenue in October fell 0.3% to NT\$37.25 billion from NT\$37.37 billion in the same month last year.

[Panasonic to shut chip fab in southwestern Japan](#)

Source: Jiji Press – 10th November 2011

Panasonic plans to close a chip fabrication plant in Hioki, Kagoshima Prefecture, south-western Japan, as part of an effort to downsize its television operations.

[Industrial semiconductor segment grew 35% in 2010: TI holds #1 spot](#)

Source: Jacobo Carrasco Heres, iSuppli – 10th November 2011

The industrial semiconductor sector outgrew wireless, computers and consumer electronics in 2010, TI earned \$1.79 billion in industrial electronics semiconductor revenue, giving it a 6.5% market share

[Emerging semiconductor companies: financial analysis with GSA](#)

Source: Electroiq – 9th November 2011

Global Semiconductor Alliance, GSA presents analysis of the financial status of the top 15 voted emerging companies, including the top three nominees Cavium, NetLogic Microsystems, and Silicon Laboratories.

[TSMC approves capex bump for advanced fab tech](#)

Source: Electroiq – 9th November 2011

TSMC's Board of Directors has approved about \$1,061.4 million in capital expenditures to grow advanced technology process capacity. The funds will also be used to build and expand 12" GigaFab facilities.

[Spreadtrum Q3 beats; sees strong Q4](#)

Source: Reuters – 9th November 2011

Spreadtrum Communications' quarterly results beat estimates, helped by sales to low-cost feature phone and smartphone makers, and the fabless semiconductor maker forecast a strong fourth quarter sending its shares up as much as 6 per cent in extended trade.

[300mm wafers buck soft silicon growth trend](#)

Source: Electroiq – 4th November 2011

Worldwide silicon wafer area shipments decreased 2% quarter-to-quarter in Q3 2011 and dropped 5% year-over-year, according to the SEMI Silicon Manufacturers

Group (SMG) in its quarterly analysis of the silicon wafer industry.

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MERGERS, ACQUISITIONS, JOINT VENTURES, SPIN OFFS AND PEOPLE

[Synopsys to buy Magma Design for \\$7.35/share](#)

Source: Reuters – 30th November 2011

Chip-design software maker Synopsys agreed to buy peer Magma Design Automation for \$7.35 a share in cash, to add complementary technology offerings to its portfolio and forecast a strong first quarter.

[Broadcom, NXP, Freescale and Harman join forces to establish in-car ethernet](#)

Source: Christoph Hammerschmidt, EE Times – EDN – 28th November 2011

The trend towards the deployment of Ethernet for IVN (in-vehicle networking) is gaining further momentum: After recent announcements from chip vendor Freescale and automotive supplier Continental, four technology companies launched the OPEN Special Interest Group aiming at establishing the technology in automotive applications.

[Gentex announces acquisition of Intersense](#)

Source: Marketwire – 23rd November 2011

The agreement to acquire InterSense, a leading developer of MEMS-based hybrid motion tracking systems, advances GENTEX's growth strategy and expands the company's capabilities to address the growing demand for precision motion tracking and situational awareness capabilities in military and non-military markets.

[Huawei buys out Symantec for control of joint venture](#)

Source: Jack Clark, ZDNet – 15th November 2011

Huawei will purchase Symantec's 49-percent share of the Huawei Symantec business for \$530m (£335m). Once the deal closes, Huawei plans to rename the company and expects to hire more employees.

[ASU and U. of Hong Kong work jointly on flexible electronics](#)

Source: Industrial Printing – 15th November 2011

In this alliance, ASU provides expertise and unique pilot line manufacturing capability in flexible microelectronics based on state-of-the-art amorphous silicon thin film transistor (TFT) technology and also emerging metal oxide TFT technology. CityU offers expertise in flexible nanowires, a potential high-performance TFT technology.

[SK Telecom bids for Hynix as authorities investigate whether funds misused](#)

Source: Jun Yang, Bloomberg – 11th November 2011

South Korea's biggest mobile-phone company, offered to buy 20 per cent of Hynix Semiconductor even as prosecutors investigate whether the chairman of the carrier's controlling group misused funds

[MediaTek announces global partnership to bring Facebook to "smart-feature phones"](#)

Source: PRNewswire-Asia – 8th November 2011

MediaTek and Facebook announced a global partnership that will see Facebook embedded into MediaTek's mobile platform solutions, enabling users in emerging markets to access Facebook, many for the first time, via affordable mobile devices.

[Qualcomm acquires HaloIPT team and its wireless electric vehicle charging technology](#)

Source: PRNewswire – 8th November 2011

Qualcomm has acquired substantially all of the technology and other assets of HaloIPT, a leading provider of wireless charging technology for electric road vehicles.

[UMC takes majority stake in Chinese foundry](#)

Source: Semiconductor Manufacturing & Design Community – 5th November 2011

The Taiwan foundry vendor has finally taken a majority stake in China's He Jian Technology Suzhou Co. Ltd. UMC already owns a 15 percent share in the Chinese foundry vendor and has been trying to gain a 100 percent stake in that company.

[ARM acquires Prolific](#)

Source: Reuters – 1st November 2011

ARM has acquired Prolific, a privately owned US based company which develops leading-edge IC design optimization software tools that significantly reduce development time and improve the performance of cell-based designs.

[IAC group and Malaysia based APM Automotive Holdings establish JV](#)

Source: PRNewswire – 1st November 2011

The joint ventures will offer design, engineering and manufacturing for a wide range of vehicle interior components and systems. IAC Group and APM see potential opportunities to support both multinational and domestic OEMs operating in the region.

[Toshiba, Hitachi, Sony LCD Alliance to buy Panasonic plant](#)

Source: Reuters – 1st November 2011

A public-private fund that will acquire the small- and midsize LCD operations of Toshiba, Hitachi and Sony will also buy a Panasonic factory for about 20 billion yen (\$255.5 million), Japanese business daily The Nikkei said.

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MARKET OUTLOOK

[Databeans: Medical chip market shows 9% CAGR through 2016](#)

Source: EE times – 29th November 2011

While there is a strong trend towards incorporating medical monitoring applications and equipment into the consumer segment, with increasing number of devices that provide patients with valuable data for their physicians or personal use, Databeans also notes a shift to integrate wireless capabilities to many existing applications so that they can be used with the increasing number of smartphones.

[WSTS drops 2012 chip market growth to 2.6%](#)

Source: Peter Clarke, EE Times – 29th November 2011

The World Semiconductor Trade Statistics organization has lowered its prediction for the 2012 global chip market to 2.6 per cent annual growth but raised its view of 2013 to 5.8 per cent annual growth. The previous 2012 forecast from WSTS was for 7.6 per cent growth.

[Gartner: Chip prices to stabilize in 2H12](#)

Source: EE times – 17th November 2011

With an inventory correction well under way, semiconductor sales will remain tepid for the rest of the year before returning to sequential growth sometime in the second half of 2012, according to market research firm Gartner.

[IHS reduces 2011 semiconductor forecast](#)

Source: Ian Mansfield, Cellular-News – 17th November 2011

IHS has reduced its global semiconductor market forecast for 2011 -- but still predicts a slight rise in revenue compared to 2010 because of continued growth in the third quarter. Global semiconductor revenue in 2011 now is expected to rise by 1.2 percent compared to 2010.

[Will LCD TV panel shipments decrease in 2011?](#)

Source: Electroiq – 15th November 2011

According to DisplaySearch estimates based on panel makers' shipment targets in Q4'11, 209 million LCD TV panels will be shipped in 2011, 5% less than the 220.8 million shipped during 2010. This would make 2011 the first year that LCD TV panel shipments decreased.

[Set-top box market bounces back](#)

Source: Richard Wilson, Electronics Weekly – 10th November 2011

In-Stat forecasts that digital satellite STB unit shipments will grow by nearly 14% in 2012.

[Global automotive sensors market to reach \\$20.6b by 2017: GIA](#)

Source: PRWeb – 8th November 2011

Demand for automotive sensors will be driven by recovery in GDP growth, employment rates, incomes levels and discretionary incomes, improving consumer confidence and rise in automotive production levels.

[STMicro sees chip market likely bottoming](#)

Source: MarketWatch – 7th November 2011

STMicro CEO Carlo Bozotti said the company has seen bookings recover over the past few weeks, something that indicates a bottom, but he cautioned it's still premature to say whether the improvement is sustainable.

[Shifting market share in mobile semiconductor market](#)

Source: Ian Mansfield, Cellular-News – 7th November 2011

Predicting wide shifts in market share for mobile chip vendors, The Linley Group is predicting growth of nearly 40 percent through 2015, with revenue rising from \$21.4 billion in 2010 to \$29.9 billion.

[TSMC sees signs of market turning up](#)

Source: Peter Clarke, EE Times – 7th November 2011

This is partly because concerns about the global economic situation during 2011 has caused electronic equipment and chip companies to strive to burn off inventory, and that process has now reached close to a minimum, according to Maria Marced, European president of TSMC.

[2011 IC sales 2%: Who's overachieving, who's tanking](#)

Source: James Montgomery, Electroiq – 4th November 2011

Six companies will actually enjoy double-digit growth, and three will actually surpass ≥25% growth. The winners in 2011 IC sales: Qualcomm +33%, Infineon +30%, Intel +26%, Sony +16%, Fujitsu +11%, TSMC +10%. The losers: Elpida -39%, Hynix -10%, NXP -7%, STMicro -6%, Micron -5%, UMC -5%, Renesas -3%, TI -2%. – notes IC Insights.

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IEWS AND OPINIONS

[Nvidia CEO: Supercomputing gated by power](#)

Source: Martin LaMonica, Cnet– 15th November 2011

When it comes to imagining the future of computing, the biggest constraint is electrical power rather than raw computing horsepower.

LEDs and a MOCVD bubble: We've only just begun

Source: James Montgomery, Electroiq – 9th November 2011

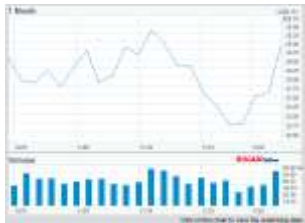
Scanning the latest reports from a quartet of Wall Street analysts, a number of key themes emerge explaining what's driving a MOCVD slump in 2011-2012 (and maybe beyond), and how and when the situation might improve

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STOCK WATCH

Source: NASDAQ

1 month chart for Intel, TSMC, TI, Broadcom, STM, Xilinx, KLA-Tencor, Qualcomm, LSI, UMC, Applied Materials, Teradyne, Toshiba and Infineon



INTEL



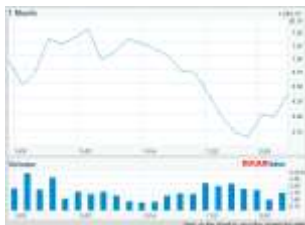
TSMC



TI



BROADCOM



STM



XILINX



KLA-TENCOR



QUALCOMM



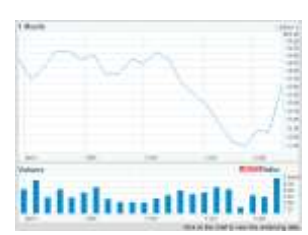
LSI



UMC



APPLIED MATERIALS



TERADYNE



TOSHIBA



INFINEON

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