



## Semiconductor Biz Insight

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

### May 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,

Last month witnessed a renewed government support in Asia's two major emerging markets (& economies). The China government wants 27.5 percent of IC manufacturing for China's major enterprises to be done domestically and to meet this, it has declared its support to boost the chip sector over the next five years. India too has embarked on a new plan designed to build at least two domestic wafers fabs for which the Indian government has proposed the establishment of a committee to identify technologies and investors to lead the effort. Personally, while I do appreciate this latest fab push, I am a bit sceptic about it [for reasons as outlined here](#).

Talking about support, the Japan quake has turned some Asian firms resort from global to local suppliers -with operations at Shin-Etsu closed, Korean & Taiwan firms had been securing their raw wafer supply locally.

On the acquisition front - TI increased its analog leverage in the market with \$6.5 billion deal to buy National Semiconductor. Wall Street's reaction - NS stock rose 70%, TI fell by 1%. Seagate bought Samsung's HDD biz. Incidentally it came just a month after Western Digital said it would buy Hitachi's HDD unit.

What is happening on the foundry front? Is a glut anticipated or is there a shift in the foundry model? Semico Research's Joanne Itow has an [interesting speculation](#) on TSMC's CEO Morris Chang's recent comment that TSMC is the most likely foundry to have reserve capacity to respond to unexpected surges in the market.

While the US based suppliers took 9 out of the top 10 in fabless IC supplier's rankings, a MEMS ranking showed that it is

increasingly an industry dominated by a limited number of big suppliers – STM, Robert Bosch, TI and HP. Incidentally, 2010 was the first year on record that total fabless IC company sales did not outperform total IC market growth.

The handset market had some interesting news. The blue ocean created by the now number one in handset revenues (yes, Apple displaced Nokia from this position this month. In fact, [look](#) at the sheer difference in the handset shipments between the two in light of the gap in their wholesale ASPs) is turning red. Apple and Samsung sued each other over patents. Apple is also known to have almost single-handedly led to reorganization at Acer to focus more on mobile than on netbooks and budget notebooks.

If you have any thoughts on the above and would like to share them with me and your industry colleagues through this e-newsletter, please email me at [meenu@asic-vlsi.com](mailto:meenu@asic-vlsi.com).

Have a good month ahead!

Best Regards  
Meenu

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## LOCAL ASIA-PACIFIC NEWS

### [Elpida claims it is first with 25nm DRAM](#)

Source: Electroiq – 28<sup>th</sup> April 2011

Elpida said both sampling and volume production of the 25-nm 2-Gbit DDR3 DRAM are expected to begin in July 2011.

### [Samsung, Apple, Nintendo buy most consumer/mobile MEMS sensors in 2010](#)

Source: Electroiq – 28<sup>th</sup> April 2011

The finalized rankings show that Samsung last year bought approximately \$200 million worth of MEMS sensors which went mostly to its mobile handsets; a considerable increase from \$137 million that the company spent in 2009. Also the top spender for consumer and mobile MEMS in 2008, Samsung finished as runner-up in 2009, muscled out by Nintendo.

### [China plans additional props for IC industry](#)

Source: Peter Clarke, EE Times – 25<sup>th</sup> April 2011

The goal is for China-made IC sales to exceed 330 billion Yuan (about \$50 billion) and meet 27.5 per cent of domestic demand in 2015. Relevant government departments would support and coordinate IC production along with links to research, manufacturing and marketing during the country's 12th Five-Year Program to cover the 2011 to 2015 period

### [STATSChipPAC aims TSV expansion in Singapore](#)

## KEY TAKE-AWAY

**Q1 results and financial health**  
Intel, ASML, Qualcomm, Huawei and ZTE posted great Q1 2011 results. However Panasonic and Nokia plan high job cuts.

### Rankings

Intel retained its top spot, Broadcom made an entry and AMD an exit in Gartner's top 10 ranking of semiconductor vendors by revenue. STM, Robert Bosch, TI and HP dominate the MEMS industry.

### Acquisitions

TI buys National Semiconductor, Seagate buys Samsung's HDD, Celestica buys Brook's manufacturing unit and BSE group acquires assets of Asia Tech.

Source: ElPort News – 25<sup>th</sup> April 2011

The company is expanding its 300mm through silicon via (TSV) offering with the addition of mid-end manufacturing capabilities.

### [Samsung sues Apple on patent infringement claims as legal dispute deepens](#)

Source: Jun Yang, Bloomberg – 22<sup>nd</sup> April 2011

The move deepens a legal dispute that's pitting the maker of the iPhone and iPad against the producer of the Galaxy mobile devices amid surging demand for smartphones and tablet computers.

### [India's latest fab push pegged at \\$5 billion](#)

Source: Kariyatil Krishnadas, Peter Clarke, EE Times – 21<sup>st</sup> April 2011

India has embarked on a new plan designed to build at least two domestic wafer fabs. Key goals of the fab effort include developing policies for encouraging access to Indian-made electronic products along with the creation of an Electronic Development Fund. The fund would provide grant money to build electronic manufacturing clusters

### [SAS approves two division spin-offs](#)

Source: Lisa Wang, Taipei Times – 15<sup>th</sup> April 2011

Solar wafer maker Sino-American Silicon Products (SAS) said that its board had approved spinning off its LED sapphire substrate and analog chip businesses to create two new companies to boost operational efficiency

### [Korea, Taiwan chipmakers turn to local wafer producers for support](#)

Source: Josephine Lien, Jessie Shen, Digitimes– 14<sup>th</sup> April 2011

Korea and Taiwan-based foundry houses and memory IC manufacturers have obtained support from their local producers of blank silicon wafers as failure of supplies from Japan still persists. Samsung and Hynix have both secured supplies of wafers from LG Siltronic. Meanwhile, Formosa Sumco Technology (FST) has moved to give priority support to its Taiwan-based clients.

### [MEMC resumes wafer production in Japan](#)

Source: PRNewswire– 12<sup>th</sup> April 2011

The facility has been shipping unaffected product and has resumed production on qualified process tools, while continuing to inspect, qualify, and ramp additional equipment. Full 300mm production is targeted to be achieved by the middle of May.

### [Samsung delays tool deliveries](#)

Source: Mark LaPedus, EE Times – 11<sup>th</sup> April 2011

Samsung Electronics may be pushing out its fab tool deliveries. 'In the last week, we have heard concerns regarding Samsung potentially pushing out as much as \$1 billion in capex due to reduced spending at both Line 16 and Line 14,' said C.J.

### **Public Training**

Public Training, "[Technical Marketing Essentials – for semiconductor professionals](#)" organized along with NUS in Singapore – 9<sup>th</sup> to 10<sup>th</sup> June 2011

Muse, an analyst with Barclays Capital, in a report.

### [NXP puts up automotive technical centre in China](#)

Source: EIPort.News – 11<sup>th</sup> April 2011

NXP made two major announcements underscoring its commitment to the growing automotive market in China. First, NXP has established a new China Automotive Technical Center to focus on R&D, system innovation and customer application support in China. The second announcement is that the company is moving its automotive sales and marketing headquarters from Hamburg, Germany to Shanghai, China effective April 1.

### [TSMC sees double patterning at 20nm generation](#)

Source: David Lammers, Semiconductor Manufacturing & Design – 11<sup>th</sup> April 2011

TSMC's 20nm design ecosystem will support double patterning, said Ed Wan, senior director of design technology. The place and route tool vendors will incorporate support for double patterning, shielding designers from a need to deal directly with DP in their designs.

### [Tower foundry opens Shanghai office](#)

Source: Peter Clarke, EE Times – 7<sup>th</sup> April 2011

Tower said it wants to increase its business in China in the RF market as well as in power management, CMOS image sensors, MEMS and other applications.

### [Lattice Semiconductor announces expanded presence in India](#)

Source: Yahoo Finance – 4<sup>th</sup> April 2011

Lattice has had a presence in India through distributors for over 15 years, and established a direct sales office in 2006. As a complete sales and support center, however, Lattice India marks both an expanded presence as well as a new level of commitment to the India market.

### [Acer reorganizations focused on mobile, tablet forecasts kept high](#)

Source: Electronista – 1<sup>st</sup> April 2011

Acer outlined a consciously mobile-oriented focus for restructuring and with the emphasis on being profitable rather than on sheer market share. The overall switch away from Acer's traditional computer business would require more spending on research and development.

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## INDUSTRY HEADLINES

[Accellera calls for IP tagging effort](#)

Source: Marketwire – 26<sup>th</sup> April 2011

The electronics industry organization focused on the creation and adoption of EDA and IP standards is kicking off an IP Tagging effort that will track soft IP information which will be automatically added and detectable in the final GDSII database format.

#### [SanDisk –Toshiba reclaim NAND lead](#)

Source: Mark LaPedus, EE Times – 21<sup>st</sup> April 2011

A week after Intel-Micron duo rolled out a 20nm process for NAND flash, SanDisk and Toshiba claim that they have fabricated NAND flash memories with 19-nm process technology. The two companies have a joint manufacturing venture in Japan.

#### [Altera sets record for most transistors on an IC](#)

Source: Chip Design Magazine – 18<sup>th</sup> April 2011

The FPGA vendor announced it has set an industry milestone in semiconductor technology by delivering the most transistors ever packed onto an integrated circuit. Its 28-nm Stratix<sup>®</sup> V FPGAs are the semiconductor industry's first devices to feature 3.9 billion transistors.

#### [Cisco kills flip camera in first revamp step](#)

Source: Jim Finkle and Paul Thomasch, Reuters – 12<sup>th</sup> April 2011

The move to kill a gadget that won rave reviews for jump-starting low-cost handheld video and was the top-selling camcorder in the United States last year comes less than a week after Chambers said he had to make "tough decisions" about cutting spending on some product areas.

#### [LTE shift brings uncertainty](#)

Source: EE Times – 11<sup>th</sup> April 2011

According to the Global Mobile Suppliers Association, 196 carriers in 75 countries are supporting LTE in various degrees. 140 of those operators will deploy LTE systems in 56 countries; an increase of 118 per cent from year-ago levels, while 56 others are engaged in LTE trials.

#### [TI puts ECG on a chip](#)

Source: PRNewswire – 6<sup>th</sup> April 2011

TI introduced the industry's first fully-integrated AFEs with on-chip respiration impedance measurement in full production. The 24-bit ADS1298R devices simplify the implementation of respiration detection in portable electrocardiogram (ECG) equipment by integrating more than 40 discrete components, reducing component count as much as 97 percent.

#### [GSA survey reports climbing wafer prices](#)

Source: Peter Clarke, EE Times – 4<sup>th</sup> April 2011

The price of wafers fabricated at foundries jumped by 5 per cent in the fourth quarter of 2010, turning round a falling trend seen in the previous two quarters of 2010, according to a survey conducted by the Global Semiconductor Alliance (GSA).

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## FINANCIAL WATCH

### [MediaTek looks 5-12% sequential revenue gains in 2Q11](#)

Source: Cage Chao, Steve Shen, Digitimes – 2<sup>nd</sup> May 2011

Buoyed by seasonal demand and steady ASP, MediaTek expects its revenues to grow 5-12% sequentially to US\$727.82-776.57 million in the second quarter of 2011.

### [Panasonic planning to cut 17000 jobs](#)

Source: BBC News – 28<sup>th</sup> April 2011

Japan's top consumer electronics maker is planning to cut 17,000 jobs in an effort to reduce costs. The reforms also involve wide-ranging restructuring of the firm's global businesses.

### [TSMC Q1 sales down 4.3% on Q410; up 14.3% YoY](#)

Source: David Manners, Electronics Weekly – 28<sup>th</sup> April 2011

TSMC reported Q1 sales of \$3.6bn down 4.3% from the \$3.8bn of Q410 and 14.3% from the \$3.2bn of Q110, for a net profit of \$1.25bn. Gross margin was 49%, down 0.8% from 4Q10 and up 1.1% from 1Q10.

### [Most fabless leaders call US home](#)

Source: Electroiq – 25<sup>th</sup> April 2011

According to a recent report from IC Insights, US-based suppliers captured 9 of the top 10 places and 13 of the top 20 positions in the fabless IC supplier ranking for 2010. 2010 was the first year on record that total fabless IC company sales did not outperform total IC market growth (a 27% increase for fabless IC companies versus a total IC industry growth rate of 31%).

### [Qualcomm rides smartphone wave to higher profits](#)

Source: Phil Goldstein, Fierce Wireless – 21<sup>st</sup> April 2011

Capitalizing on the surging demand for smartphones, Qualcomm posted record quarterly revenues yet again in its fiscal second quarter. It posted net income of \$999 million, up 29 percent from the \$774 million it recorded in the year-ago period. The company's total revenue clocked in at \$3.88 billion, up 46 percent from its \$2.66 billion from the year-ago period.

### [Apple becomes world's largest handset vendor by revenue in Q1 2011](#)

Source: Business Wire – 21<sup>st</sup> April 2011

According to the latest research from Strategic Analytics, in revenue terms, Apple is now the world's largest handset vendor, smartphone vendor and tablet vendor

#### [Financial results: Philips, Cree, SemiLEDs](#)

Source: LEDs Magazine – 20<sup>th</sup> April 2011

LED products accounted for 14% of Philips' lighting sales in the last fiscal year. Meanwhile, shares in Cree and SemiLEDs have been hit by poor recent performance.

#### [Broadcom moves on to top 10 list as 2010 semi revenue records more than 30% growth](#)

Source: Suzanne Deffree, EDN – 19<sup>th</sup> April 2011

Broadcom entered Gartner's top 10 ranking of semiconductor vendors by revenue for the first time in 2010, a year that saw total worldwide semiconductor revenue reach \$299.4 billion. Intel retained top spot and AMD moved out.

#### [Intel gets record Q1 2011 results, doubts PC's death](#)

Source: Electronista – 19<sup>th</sup> April 2011

Its revenue was up 25 percent to \$12.8 billion and its net profit up by 29 percent to \$3.3 billion. Most of that growth came from its datacenter chip team, whose revenue was up 32 percent, but it still saw its core PC chip group's revenue up by 17 percent as the second-generation Core (Sandy Bridge) take off.

#### [ZTE posts 16% jump in Q1 profit, bolstered by device sales](#)

Source: Phil Goldstein, FierceWireless – 19<sup>th</sup> April 2011

The Chinese vendor reported first-quarter net profit of \$19.4 million in the quarter, up from \$16.8 million in the year-ago period. ZTE said total operating revenue clocked in at \$2.3 billion, up from \$2.02 billion in the year-ago period.

#### [Huawei posts surging 2010 revenues, discloses board members](#)

Source: Phil Goldstein, FierceWireless – 18<sup>th</sup> April 2011

Huawei reported a 24 percent spike in revenue and a 30 percent jump in net profit for 2010, according to its audited full-year results. The Chinese vendor, which has drawn criticism in the U.S. for not being transparent enough, also disclosed for the first time the names and biographies of those on its board of directors.

#### [Secondary equipment market reaches \\$6b in 2010](#)

Source: Semi – 13<sup>th</sup> April 2011

This is a 77 percent increase over 2009. At 13 percent of the total equipment spending, the SEMI/Semico study confirms that growing importance of secondary equipment and services at both 300 mm and 200 mm fabs.

#### [ASML sees record year, negligible impact from Japan earthquake](#)

Source: Archibald Preuschat, Dow Jones Newswires - 13<sup>th</sup> April 2011

The Dutch maker of lithography systems said first quarter net profit beat expectations, rising to EUR 395 million from EUR107 million a year earlier. Sales almost doubled to EUR1.45 billion from EUR742 million for the three months to March 31, as the company benefited from the strong recovery in the semiconductor industry.

#### [4 companies dominate MEMS top 30](#)

Source: Nicolas Mokhoff, EE Times – 13<sup>th</sup> April 2011

According to market research firm Yole Developpement, in 2010 the largest four MEMS manufacturers—Texas Instruments, Hewlett Packard, Robert Bosch and STMicroelectronics—increased their combined MEMS sales by some 37 per cent, to ~\$2.9 billion due to aggressive volume ramps and die size shrinks.

#### [Micrel slashes Q1 outlook](#)

Source: Reuters – 11<sup>th</sup> April 2011

The analog chipmaker cut its first-quarter revenue outlook as sales to a key mobile handset maker fell short of expectations, sending its shares down 13 per cent in extended trading. Micrel provides power management chips for mobile phones. An analyst has attributed the muted outlook to Samsung Electronics.

#### [LTE 4G chipset company Altair Semiconductor raises \\$26m](#)

Source: Globes – 10<sup>th</sup> April 2011

The LTE 4G chipset designer company has raised \$74 million to date, including the current round of \$26m, since it was founded in 2005.

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## MERGERS, ACQUISITIONS, JOINT VENTURES, SPIN OFFS AND PEOPLE

#### [Celestica acquires Brook's manufacturing unit](#)

Source: PRNewswire – 21<sup>st</sup> April 2011

Celestica will acquire the semiconductor equipment contract manufacturing operations of Brooks Automation. The operations, based in Portland, Oregon and Wuxi, China specialize in manufacturing complex mechanical equipment and providing systems integration services for some of the world's largest semiconductor equipment manufacturers.

#### [BSE acquires secondary semiconductor equipment assets](#)

Source: Electroiq – 21<sup>st</sup> April 2011

Boston Semi Equipment LLC (BSE Group) acquired the assets of Asia Tech Corporation, launching BSE Tech LLC. BSE Tech will facilitate the lease, sale, repositioning and servicing of all makes and models of new and pre-owned front end semiconductor equipment worldwide.

### [Seagate buys Samsung hard disk unit](#)

Source: Reuters – 19<sup>th</sup> April 2011

Seagate's \$1.4 billion acquisition of Samsung Electronics' loss-making hard disk drive (HDD) business pits it head-to-head with Western Digital Corp in an industry that has been dogged by price wars. The deal will give Seagate access to Samsung's NAND-type flash chips for its solid state drive products.

### [Sigma designs and Vietnam Multimedia Corp. establish joint venture](#)

Source: Marketwire – 18<sup>th</sup> April 2011

The joint venture, VietSilicon Technology Joint Stock Company (VSilicon, JSC), will enable the two companies to accelerate their growth in the Vietnamese market by combining proven IPTV semiconductor technology with VTCs local content and network in Vietnam.

### [IIT Bombay and Applied Materials launch laboratory](#)

Source: EFY Times – 14<sup>th</sup> April 2011

This new laboratory expands the scope of collaboration between IIT Bombay and Applied Materials to include the development of new materials that can potentially be used in a variety of electronic and renewable energy-focused applications, including the fabrication of next-generation solar cells.

### [Pro-Lite acquires SphereOptics](#)

Source: LEDs Magazine – 11<sup>th</sup> April 2011

British photonics and light measurement equipment distributor Pro-Lite Technology has acquired a majority shareholding in German company SphereOptics. The combined company is aiming to be the leading provider of light-measurement equipment and optical instrumentation to the European market.

### [Texas Instruments to buy National Semiconductor for \\$6.5billion](#)

Source: Reuters – 4<sup>th</sup> April 2011

TI is paying a rich 78 per cent premium to merge two of the industry's oldest firms into a dominant force in analog microchips. TI will pay \$25 for each NatSemi common share, lifting the stock 74 per cent to \$24.45 in afterhours trading. TI shares fell 1.5 per cent to \$34.11

### [Omnivision purchases CMOS image sensor patents from Kodak](#)

Source: Vision Systems Design – 4<sup>th</sup> April 2011

The purchased patent portfolio comprises approximately 850 US and foreign patents and patent applications. The intellectual property includes numerous granted patents of key CMOS technologies covering early and fundamental CMOS image sensor work; improvements on foundational architectures, including new features and functions; and next generation performance improvements, miniaturization and cost reduction technologies.

### [Osram and Cree sign LED patent license agreement](#)

Source: LEDs Magazine – 4<sup>h</sup> April 2011

The cross-license agreement covers patents from both parties in the fields of blue LED chip technology, white LEDs and phosphors, packaging, LED luminaires and lamps, and LED lighting control systems.

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## MARKET OUTLOOK

### [Taiwan's semiconductor industry may top \\$69b by 2014](#)

Source: Aaron Hsu, Taiwan Today – 22<sup>nd</sup> April 2011

According to the Taipei-headquartered Market Intelligence and Consulting Institute, this is based on forecast growth of 13.09 per cent and 11.64 per cent year on year for Taiwan's wafer foundries and integrated circuit packaging firms, respectively

### [WLAN enabled product shipments to top 1 billion in 2011](#)

Source: EIPort News – 21<sup>st</sup> April 2011

IHS iSuppli expects shipments of electronic products with embedded WLAN to exceed one billion units this year and reach more than two billion in 2015. The devices that are getting enhanced with embedded WLAN include: PCs, cellphones, digital cameras and camcorders, home and handheld video game consoles, televisions, STBs and portable navigation devices.

### [Foundry glut looms ahead](#)

Source: Mark LaPedus, EE Times – 18<sup>th</sup> April 2011

After weeks of worrying about the chip supply chain, some quarters are now anticipating a leading-edge-foundry oversupply.

### [Market for new types of MEMS booms in 2011](#)

Source: Jeremie Bouchaud, iSuppli – 11<sup>th</sup> April 2011

Revenue this year for new CE and mobile MEMS devices will reach \$457.3 million, up by more than a factor of 2.5 from \$177.6 million in 2010. A category including devices such as 3-axis gyroscopes and Pico projectors, the new MEMS segment did not even exist in 2006.

### [Android to claim nearly half of smartphone OS share by 2012](#)

Source: Suzanne Deffree, EDN – 11<sup>th</sup> April 2011

Gartner reported that by the end of 2011 Android will own 38.5% of smartphone market share, compared to Symbian's 37.2%. It expects the Android market share to be at more than 49% by the end of 2012.

### [LTE capex to reach \\$28b in 2014](#)

Source: David Manners, Electronics Weekly – 11<sup>th</sup> April 2011

According to iSuppli, LTE capex will grow at 107.5% CAGR from 2010's \$1.5bn to \$27.9bn in 2014. With spending expected to increase in regions other than US, US' proportion of global capex will drop to 20% (from 50% in 2010 and 92% in 2009)

### [Top 10 capex spenders to up spend 25% this year, says IC Insights](#)

Source: David Manners, Electronics Weekly – 7<sup>th</sup> April 2011

IC Insights reckons semiconductor industry capital spending in 2011 will reach \$60.4bn - a 17% increase over the \$51.8bn spent in 2010 and all time high of \$63.3bn 2012. While the top 10 semiconductor industry spenders are forecast to increase their outlays by 25% this year, the remaining semiconductor industry companies are expected to cut their capital expenditures by 1% in 2011.

### [Semiconductor photo mask market: \\$3.2b in 2012, says Semi](#)

Source: Lara Chamness, SEMI – 5<sup>th</sup> April 2011

After contracting for two consecutive years in 2008 and 2009, the semiconductor photo mask market grew 10 percent in 2010. The mask market is expected to grow 7 percent and 2 percent over the next two years with key drivers continuing to be advanced technology feature sizes (less than 65 nm) and increase manufacturing in Asia-Pacific.

### [Aggressive LED fab investment to drive 40% growth in equipment spending in 2011](#)

Source: Clarke Tseng, SEMI – 5<sup>th</sup> April 2011

Semi recorded an explosive growth on equipment spending from LED fabs, jumping from \$606 million in 2009 to \$1.78 billion in 2010. It expects this to continue this year to reach about \$2.5 billion, a 40 percent increase year-over-year.

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## VIEWS AND OPINIONS

### [Foundries flex with customers via reserve capacity](#)

Source: Ann Steffora Mutschler, Semiconductor Manufacturing & Design Community – 14<sup>th</sup> April 2011

Digging into TSMC's Morris Chang's comment during the recent TSMC technology symposium.

### [Cadence seeks stronger presence in Asia-Pacific](#)

Source: EE Times – 11<sup>th</sup> April 2011

Charlie Huang, senior vice president and chief strategy officer at Cadence, discussed the current semiconductor landscape in China, what Cadence is finding through its R&D facilities in the nation, the company's latest efforts, key industry trends and developments, and how these will affect the [semiconductor industry](#) at large.

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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



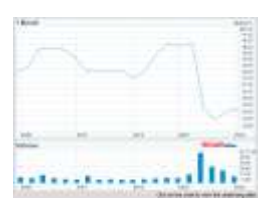
INTEL



TSMC



TI



BROADCOM



STM



XILINX



KLA-TENCOR



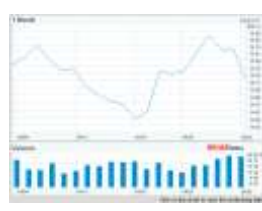
QUALCOMM



LSI



UMC



APPLIED MATERIALS



TERADYNE



TOSHIBA



INFINEON

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## **VLSI Consultancy**

*Providing techno-commercial value-addition*

17 Jalan Tenggiri, Singapore 428263

Tel: +65 98629814, Email: [meenu@asic-vlsi.com](mailto:meenu@asic-vlsi.com)

Web: [www.asic-vlsi.com](http://www.asic-vlsi.com), Blog: [www.asic-vlsi.com/blog](http://www.asic-vlsi.com/blog)

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