

Global "Purchasing Managers" Index

Diffusion Index, >50 = Growth

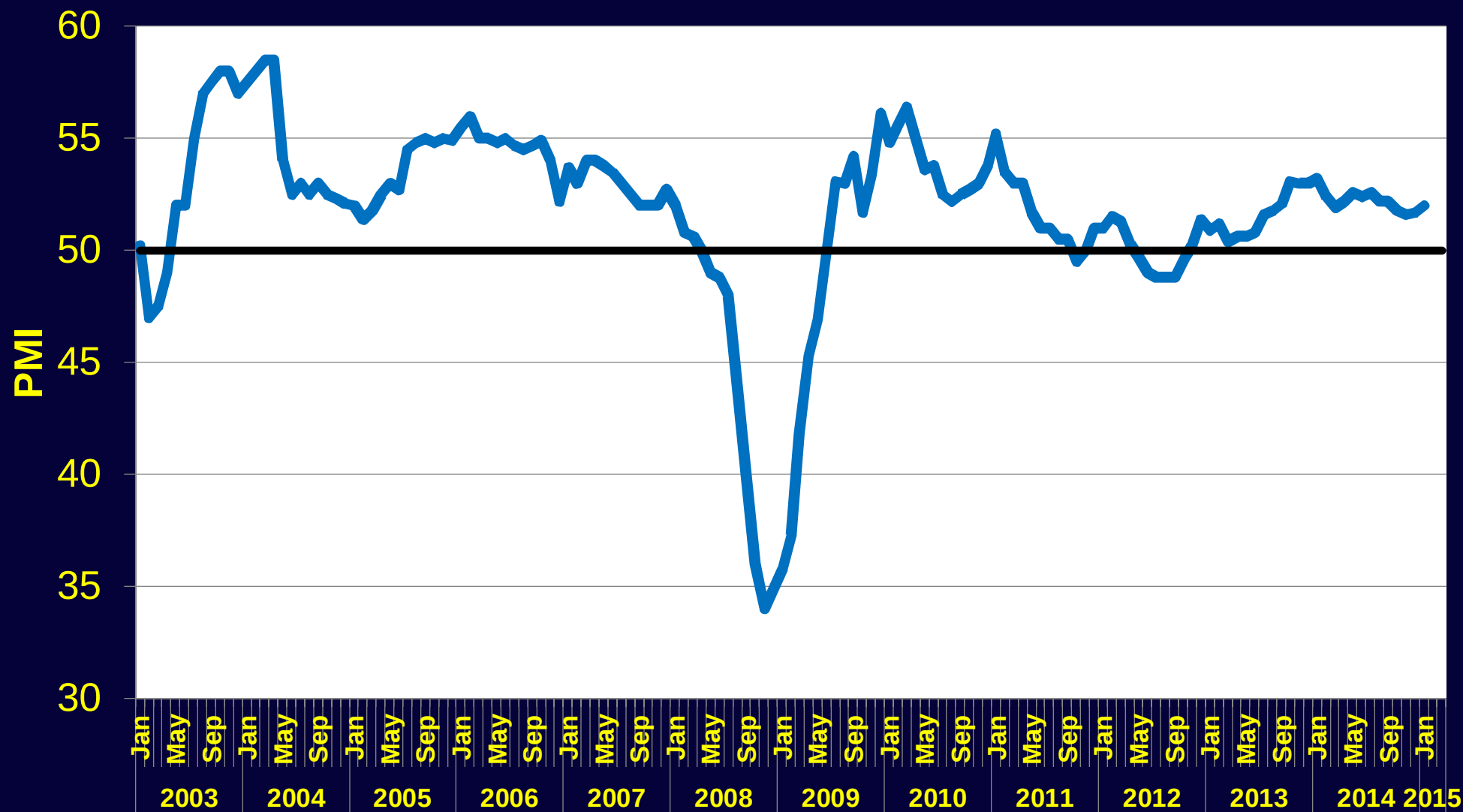
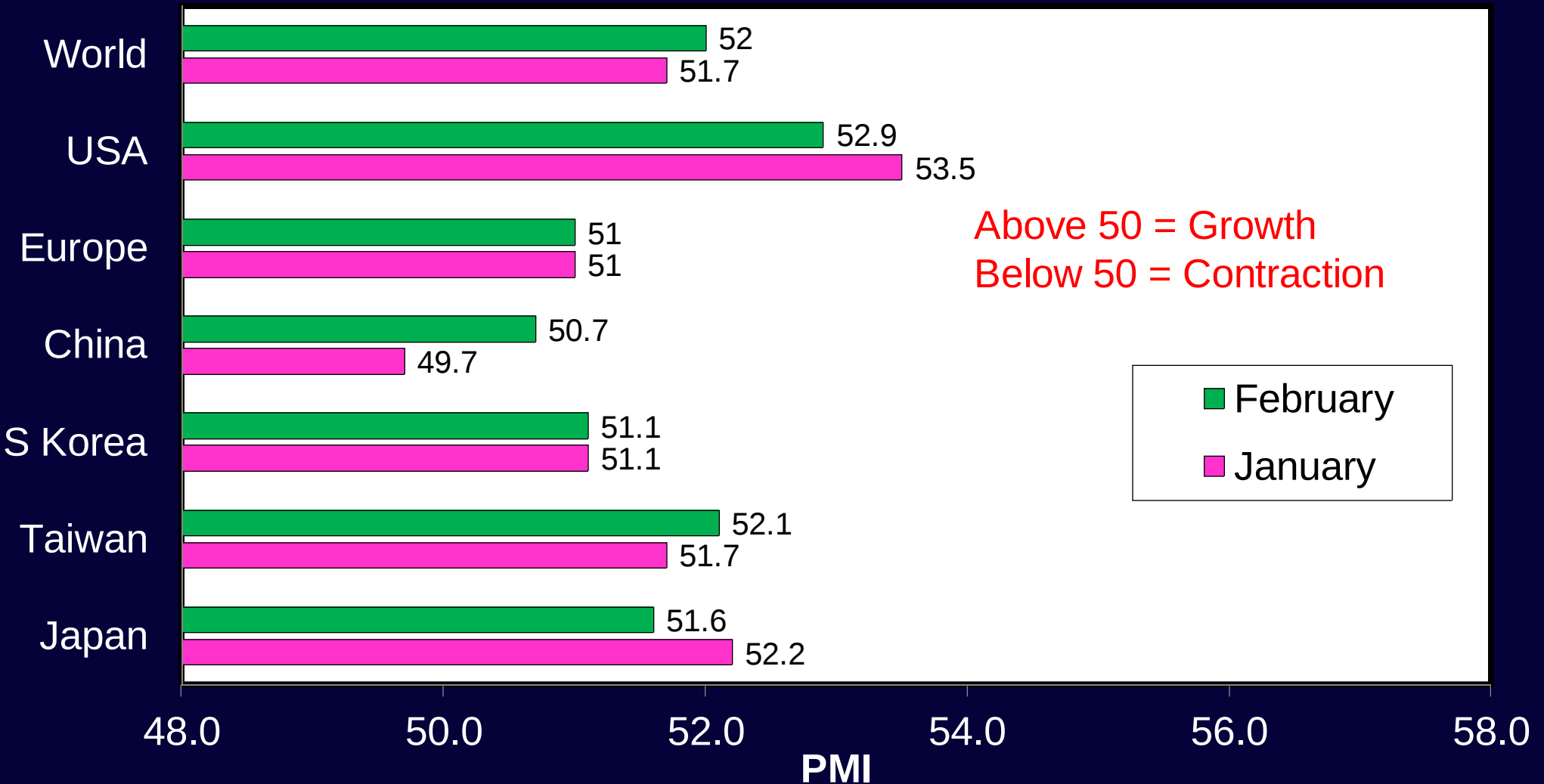


Chart 2

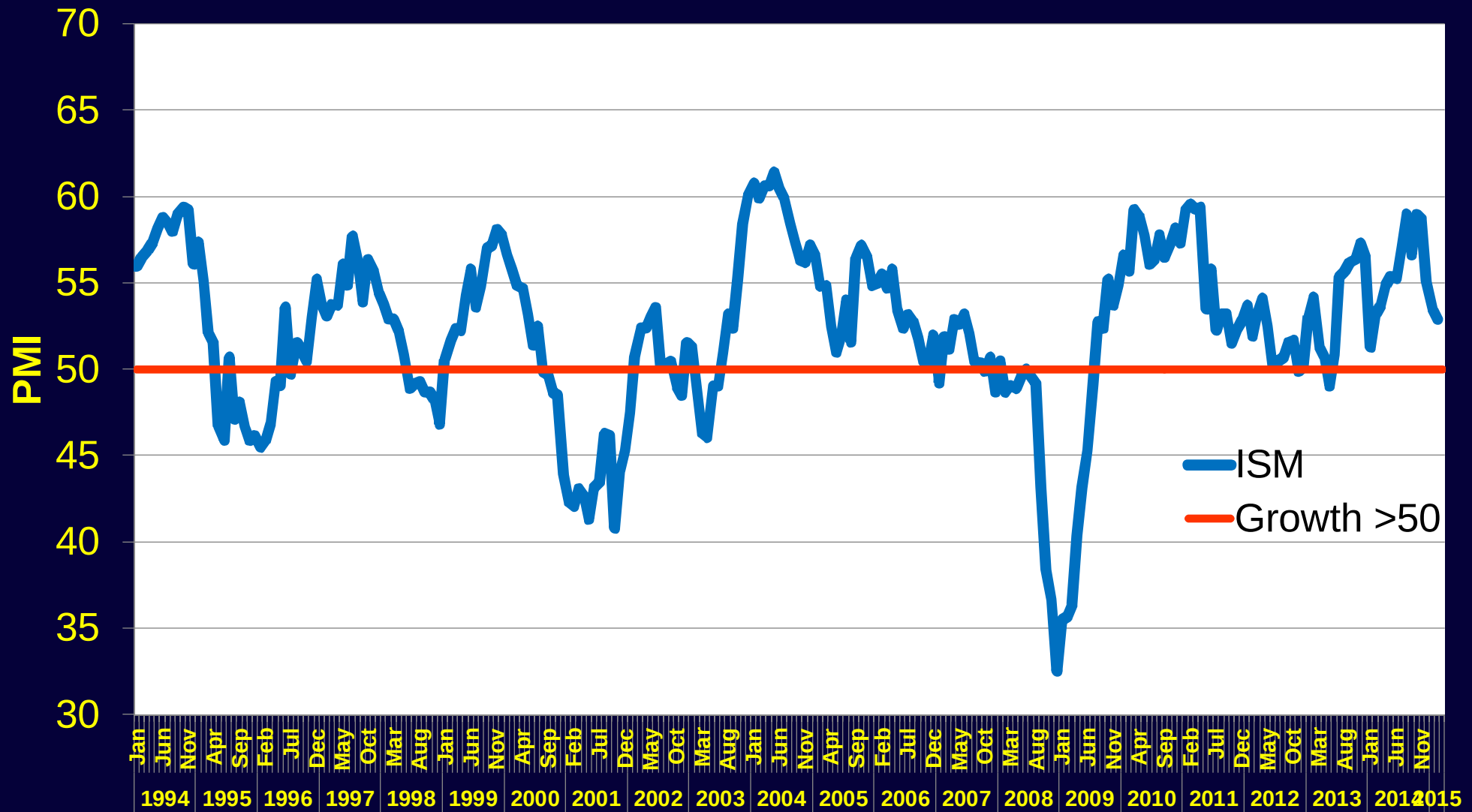
Purchasing Managers' Indices February vs. January 2015



Markit Economics, JPMorgan and ISM

U.S. "Purchasing Managers" Index ISM

Diffusion Index, >50 = Growth



U.S. Electronic Equipment Orders

Monthly Data

\$ Billions (monthly, seasonally adjusted)

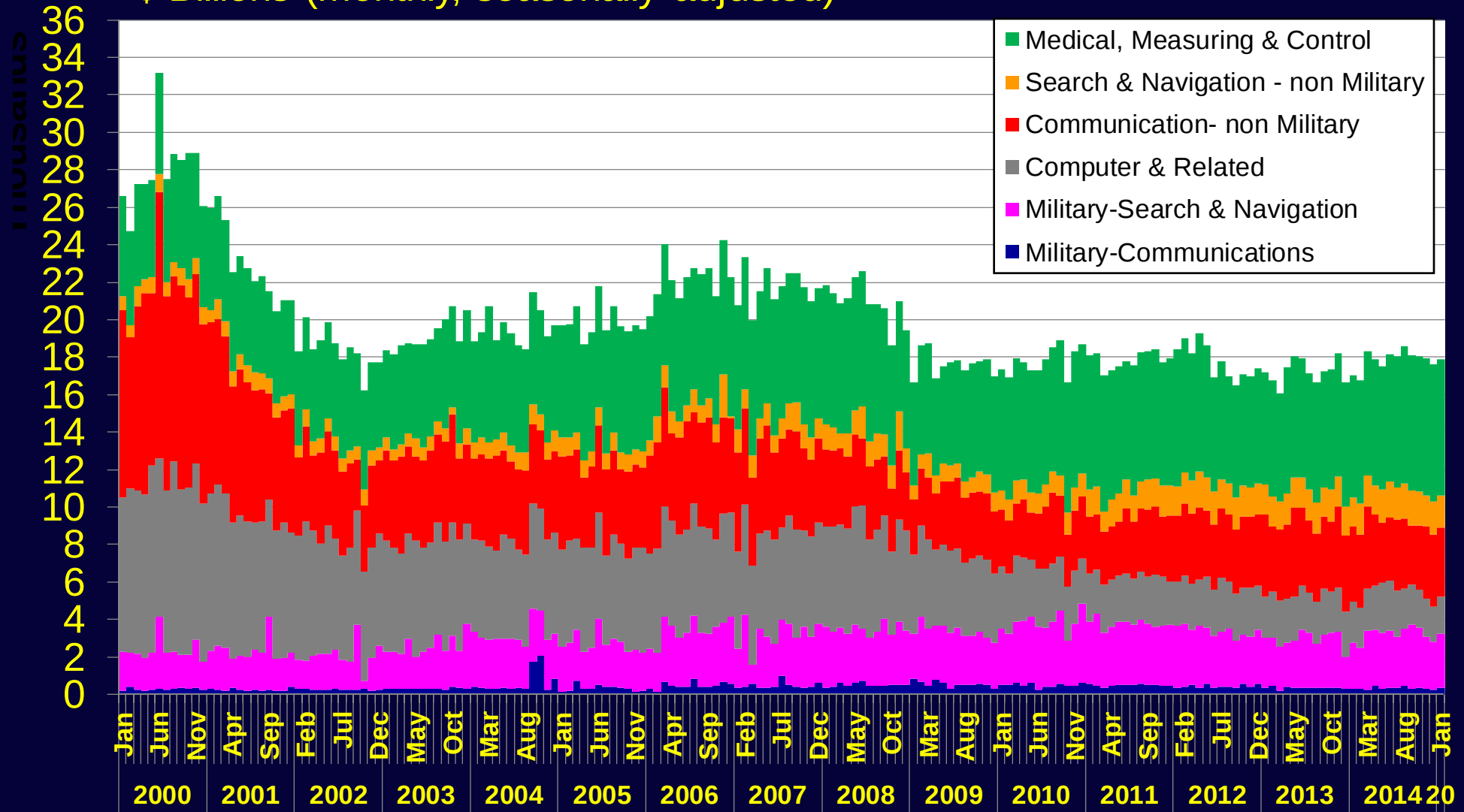
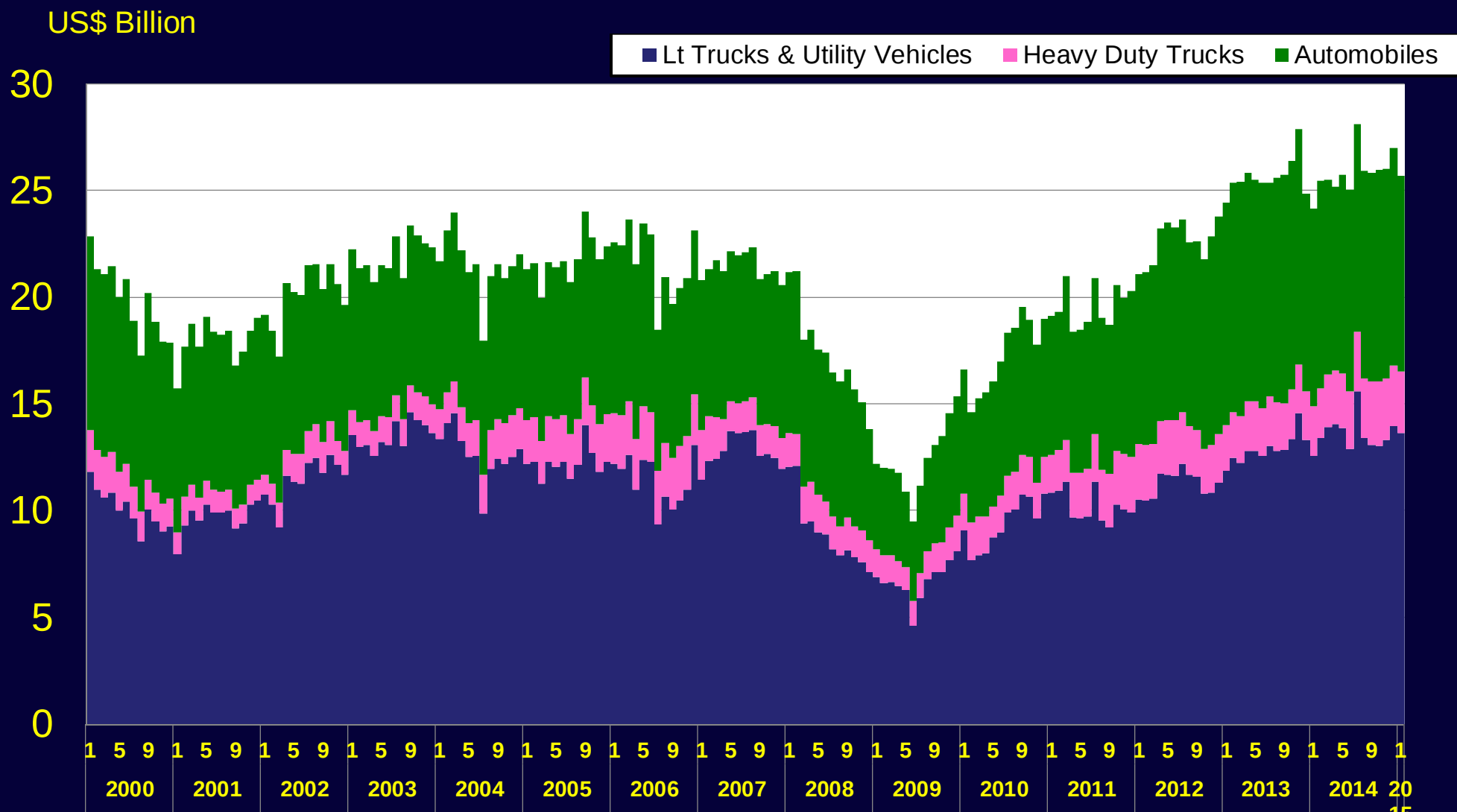


Chart 5

U.S. Vehicle Shipments



U.S. Military Electronics Orders & Shipments

Defense Communication & Search & Navigation Equipment

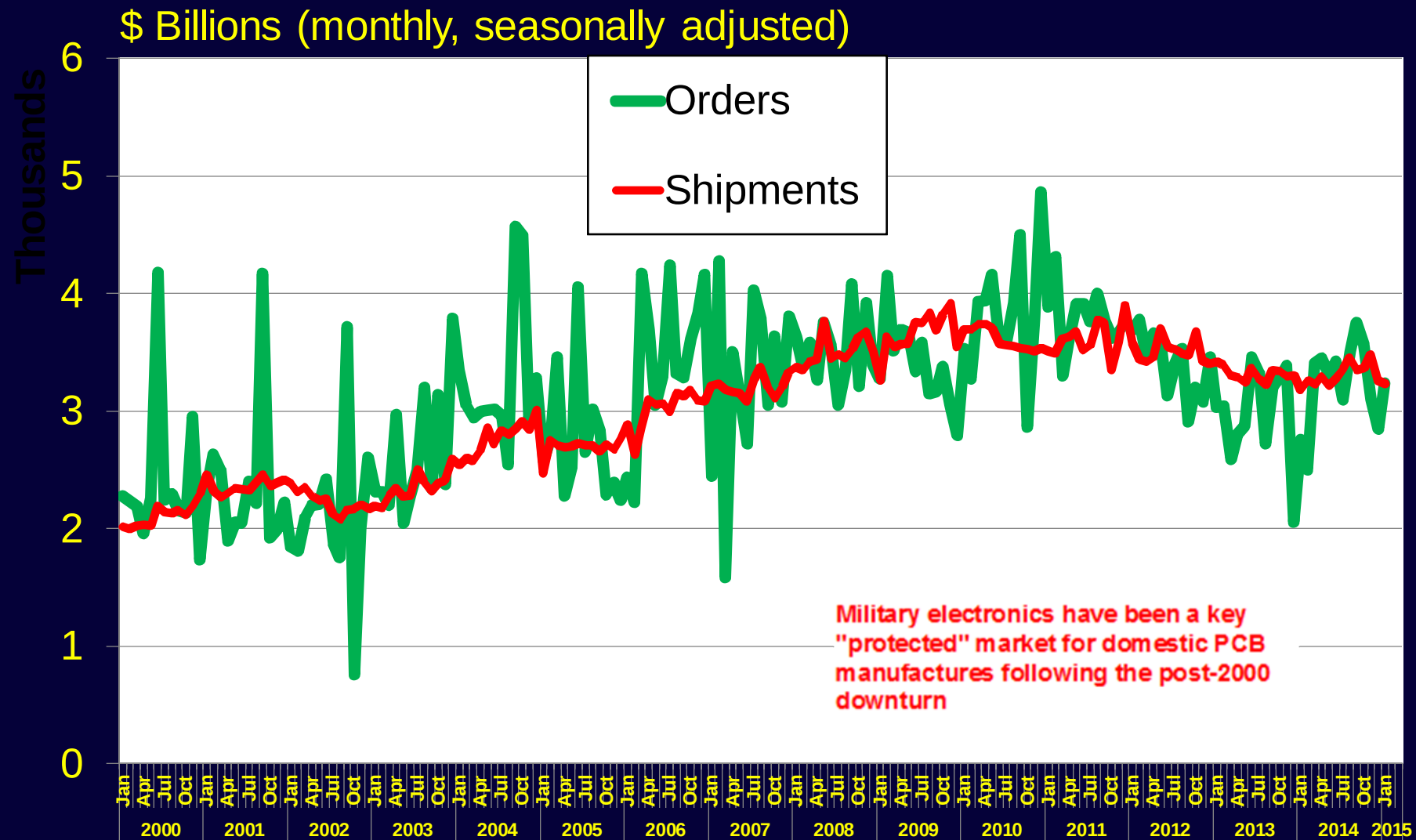


Chart 7

U.S. Electromedical, Measurement & Control Equipment Orders & Shipments

\$ Billions (monthly, seasonally adjusted)

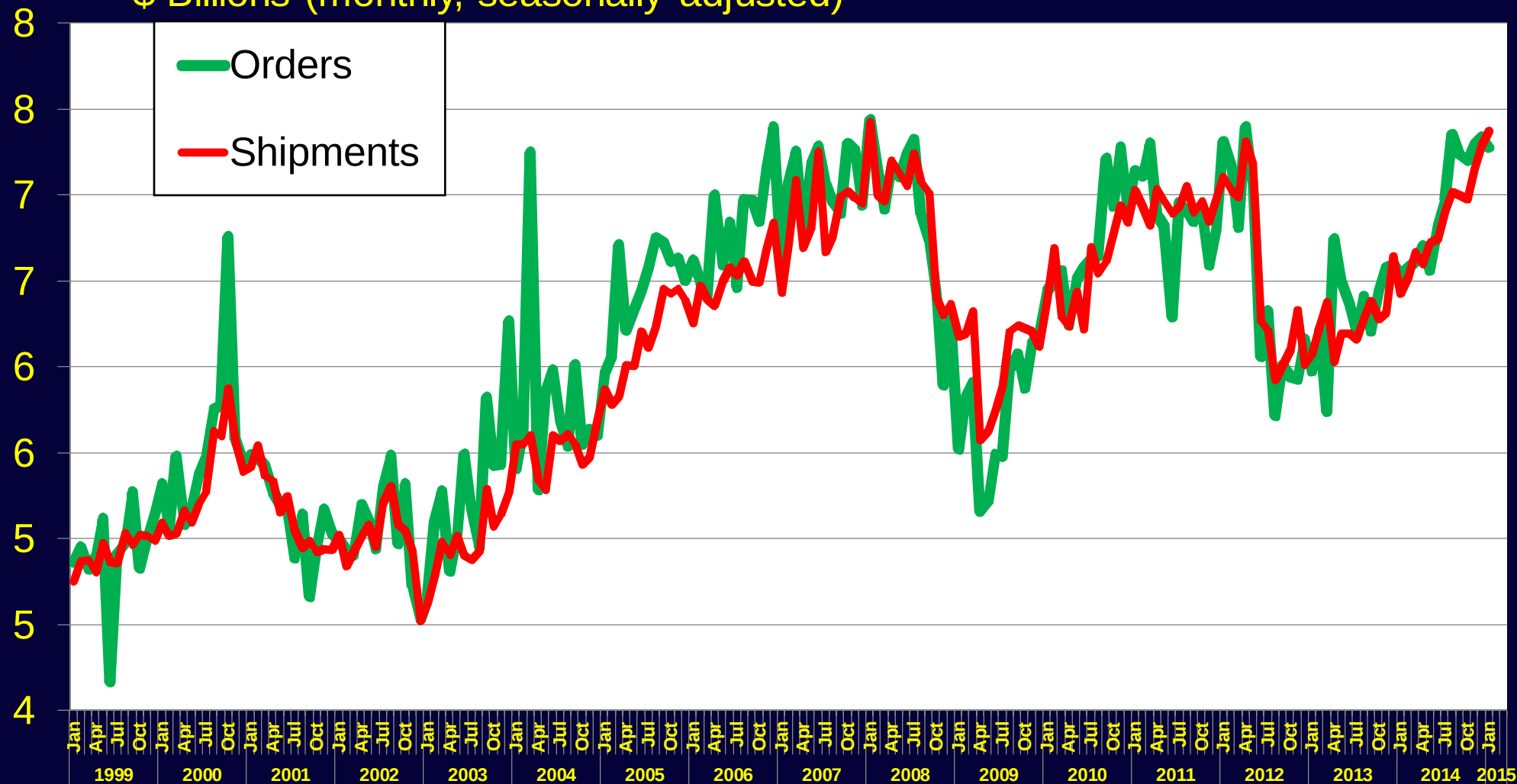
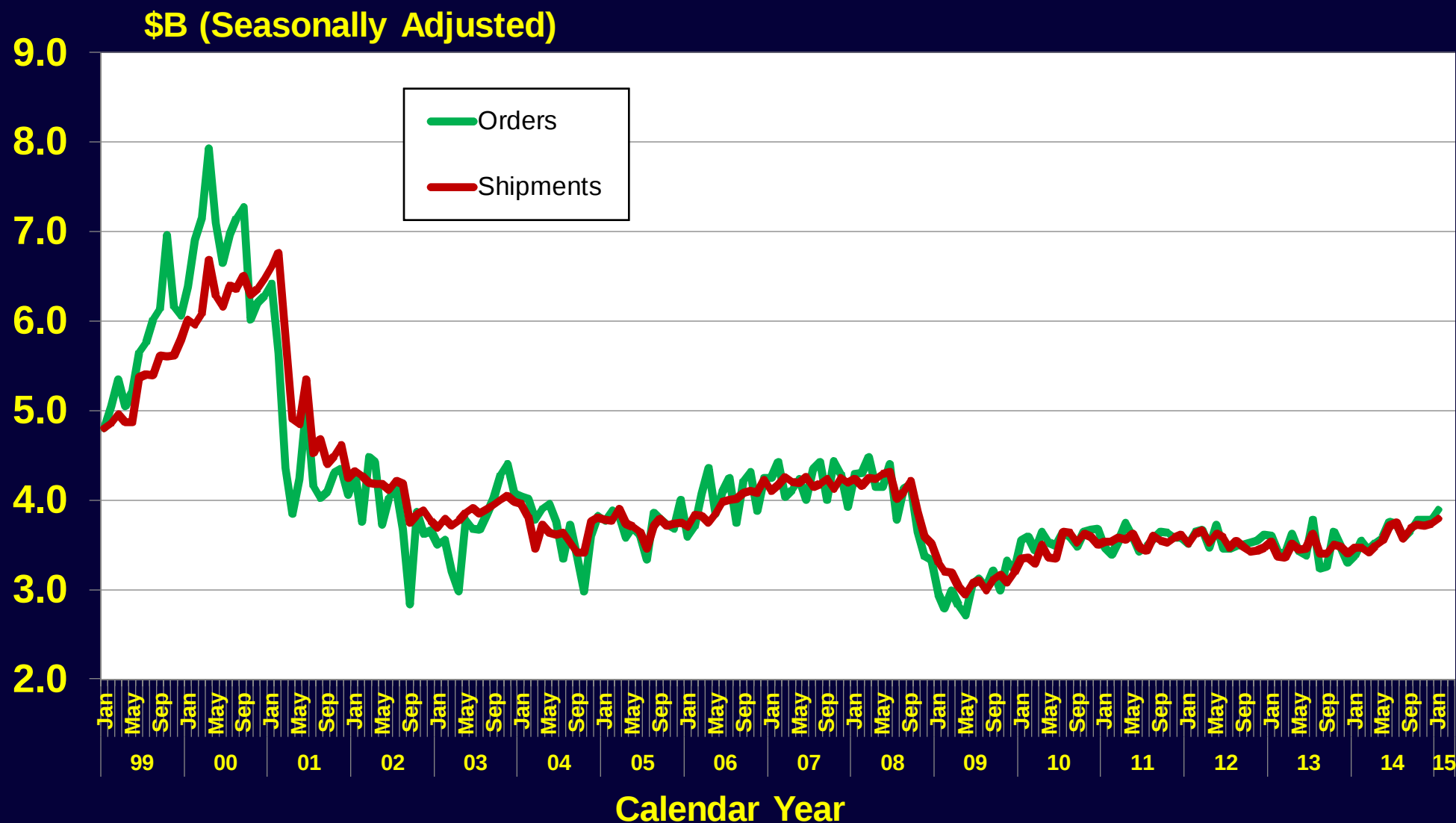


Chart 8

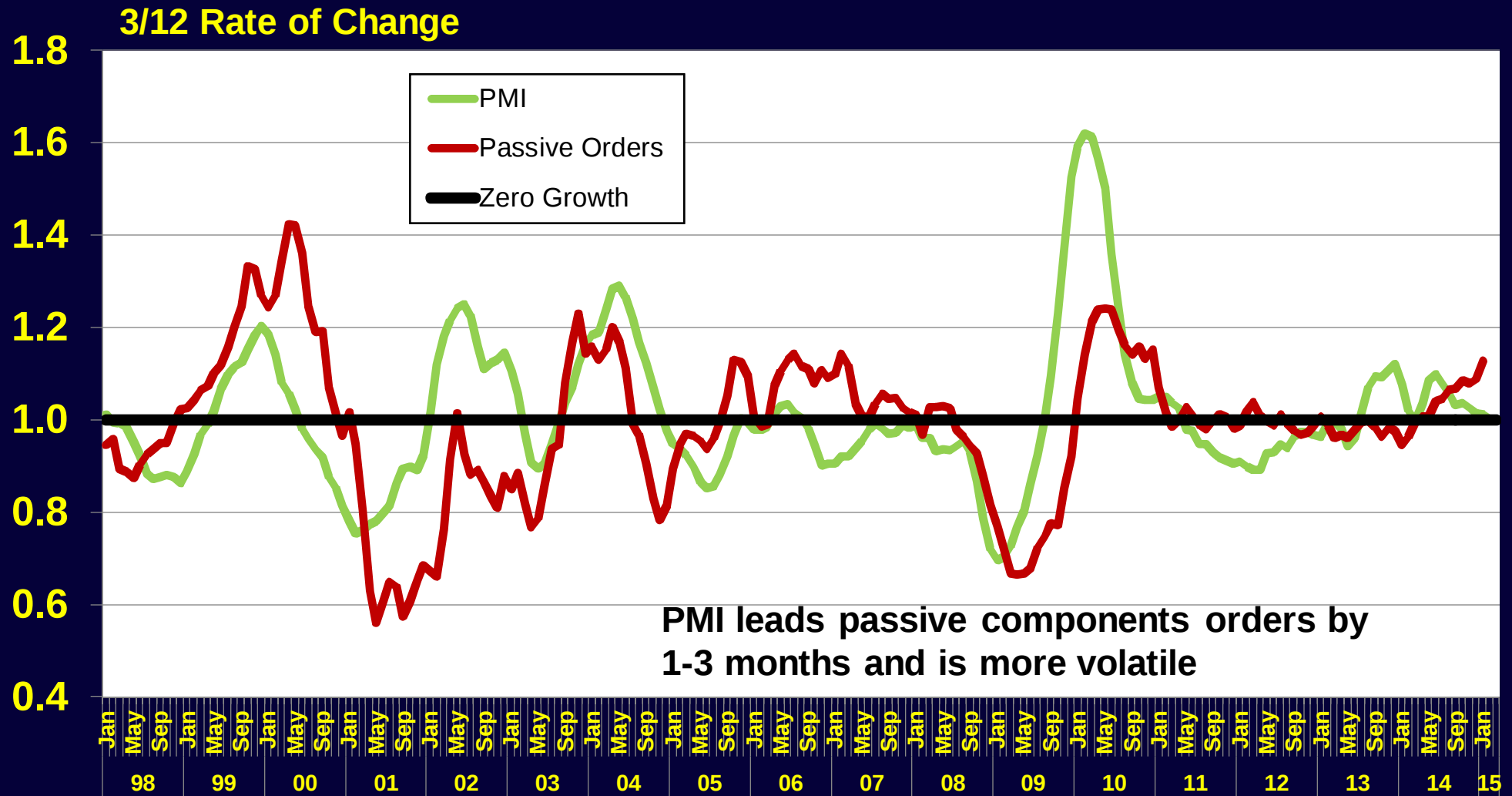
U.S. Production: "Other" Electronic Components (excludes semiconductors) Orders & Shipments



U.S. Passive Component Orders & Shipments



U.S. Passive Component Orders vs. U.S. PMI



Present Growth Rates (%)

U.S. Economy & Electronics Industry

	Latest Month	Annual Growth	3-Month Growth
Electronic Component \$			
Rigid & Flex PCB Orders (N Amer)	1/15	100.3	105.4
Rigid & Flex PCB Shipments (N Amer)	1/15	99.6	99.4
Electronic Component Orders	1/15	106.6	112.8
Electronic Component Shipments	1/15	105.2	108.6
Semiconductor Shipments to N America	1/15	113.1	116.4
U.S. Electronic Equipment Orders \$			
Computer & Related	1/15	95.9	85.2
Communication	1/15	93.1	91.9
Medical, Measurement & Control	1/15	109.7	111.2
Search & Navigation	1/15	110.9	112.1
Defense Capital Goods	1/15	110.8	109.3
Military Electronics	1/15	110.4	112.0
Total Electronic Equipment	1/15	104.0	102.9
U.S. Industrial Production	1/15	104.3	104.7

NOTE: 3 month growth rates compare most recent 3 months to same 3 months one year earlier

Monthly Semiconductor Shipments \$ Billions (3-month average)

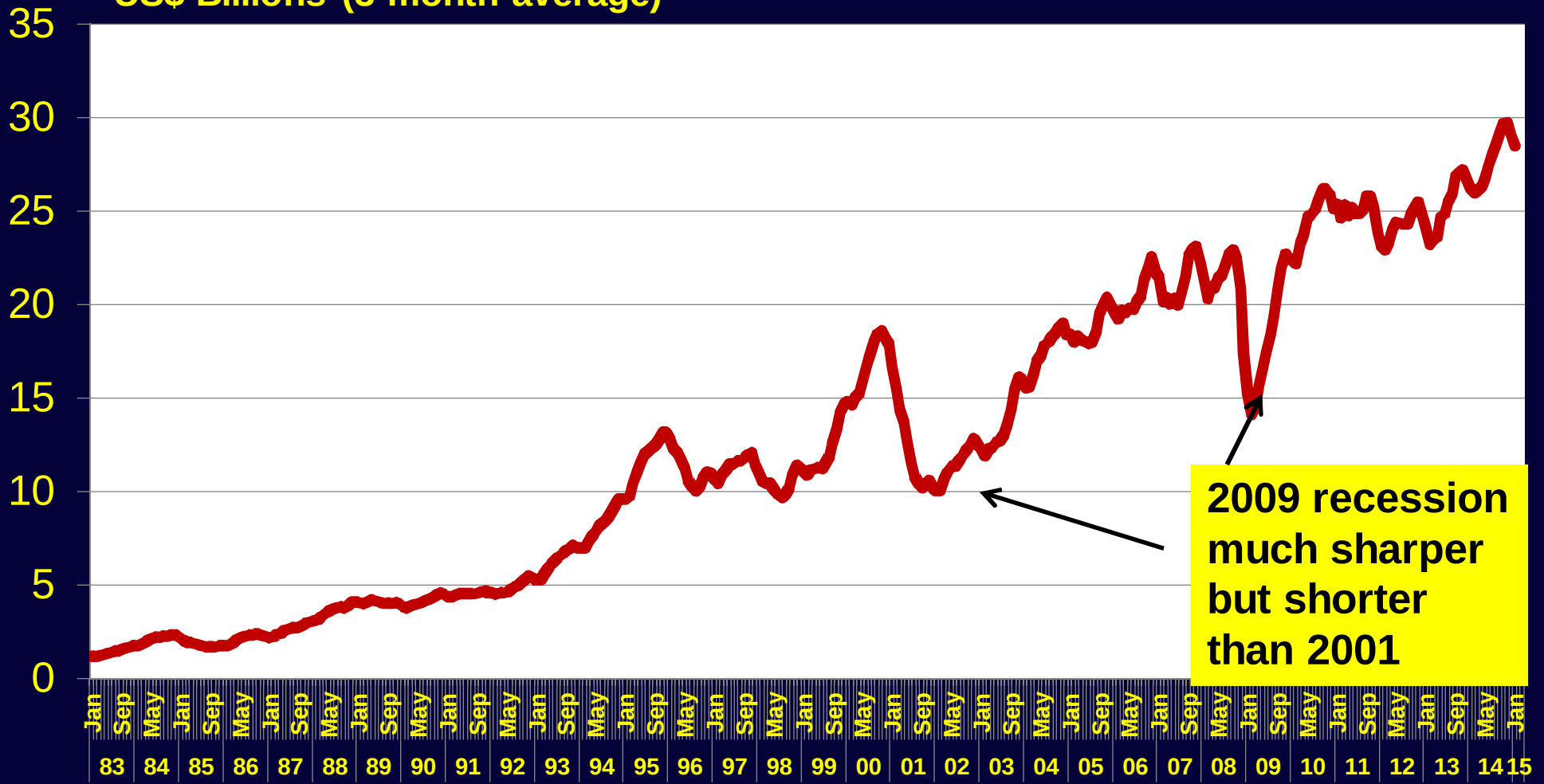
	<u>1/14</u>	<u>1/15</u>	<u>% CH</u>
Americas	5.59	6.51	+ 16.4%
Europe	2.95	2.94	- 0.2%
Japan	2.84	2.62	- 8.0%
Asia Pacific	14.87	16.46	+10.7%
Total	26.25	28.53	+ 8.7%

World Semiconductor Shipments

Monthly US\$

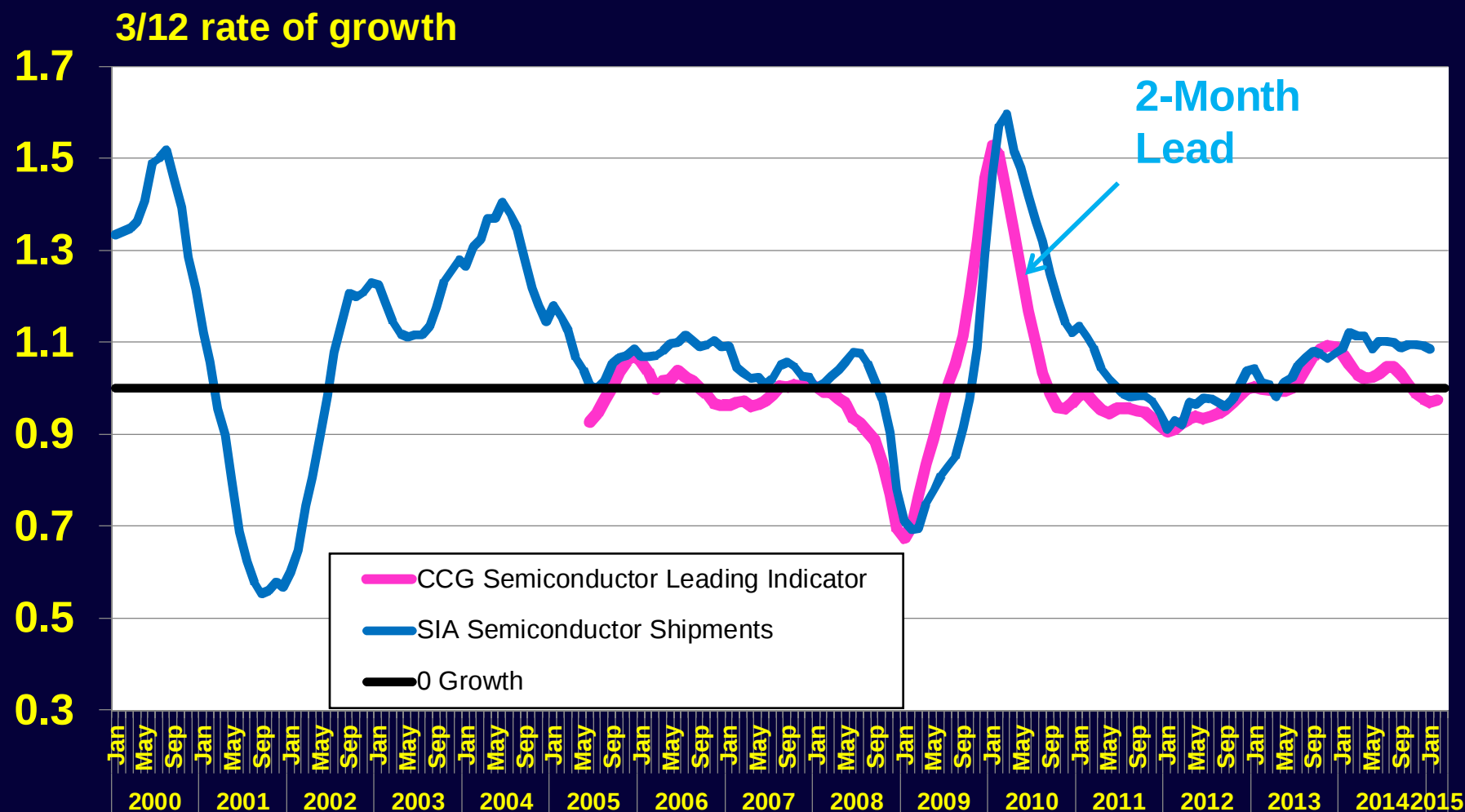
3-Month Avg

US\$ Billions (3-month average)



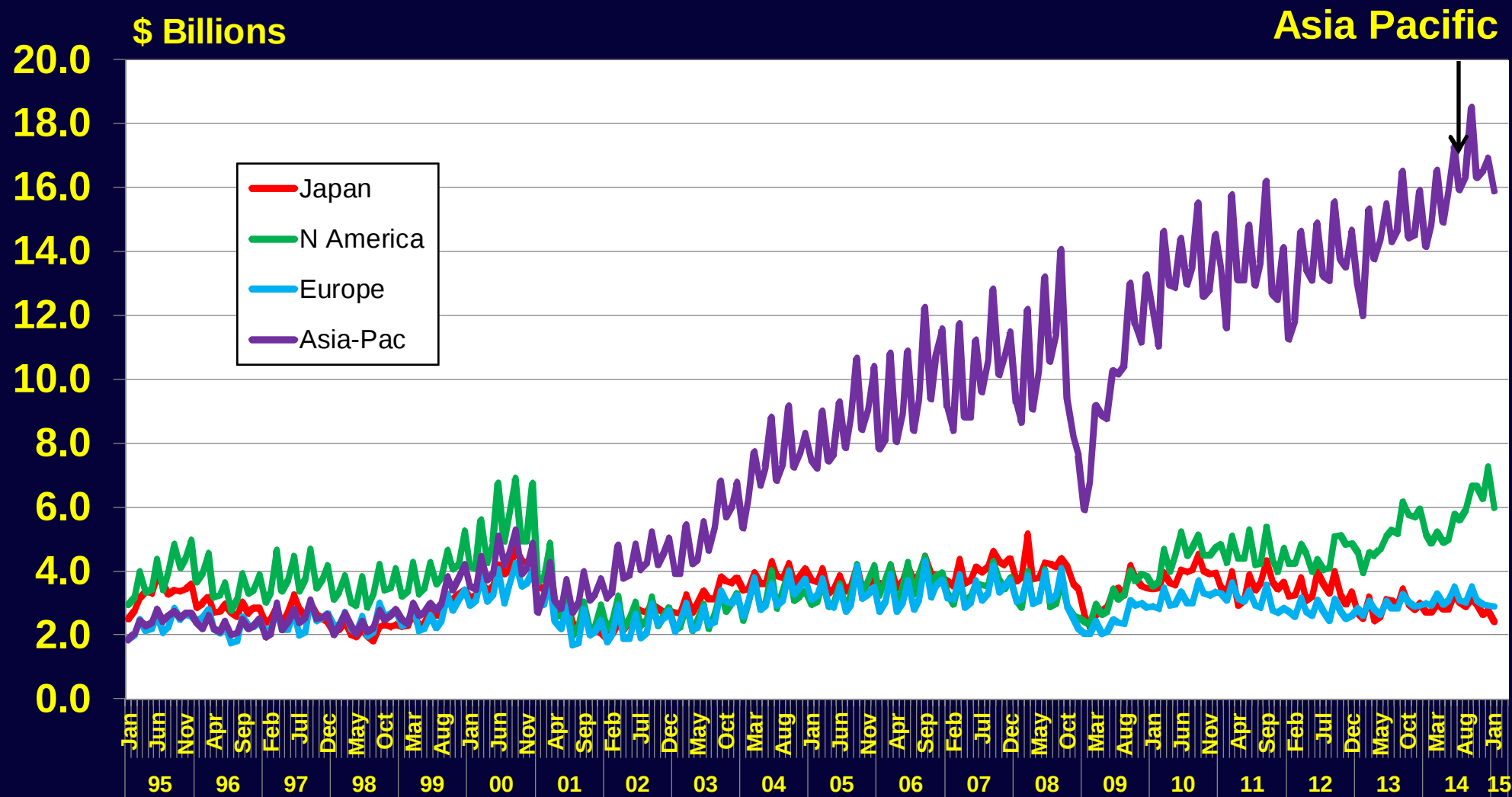
SIA

CCG Semiconductor Leading Indicator vs. Global Semiconductor Shipments



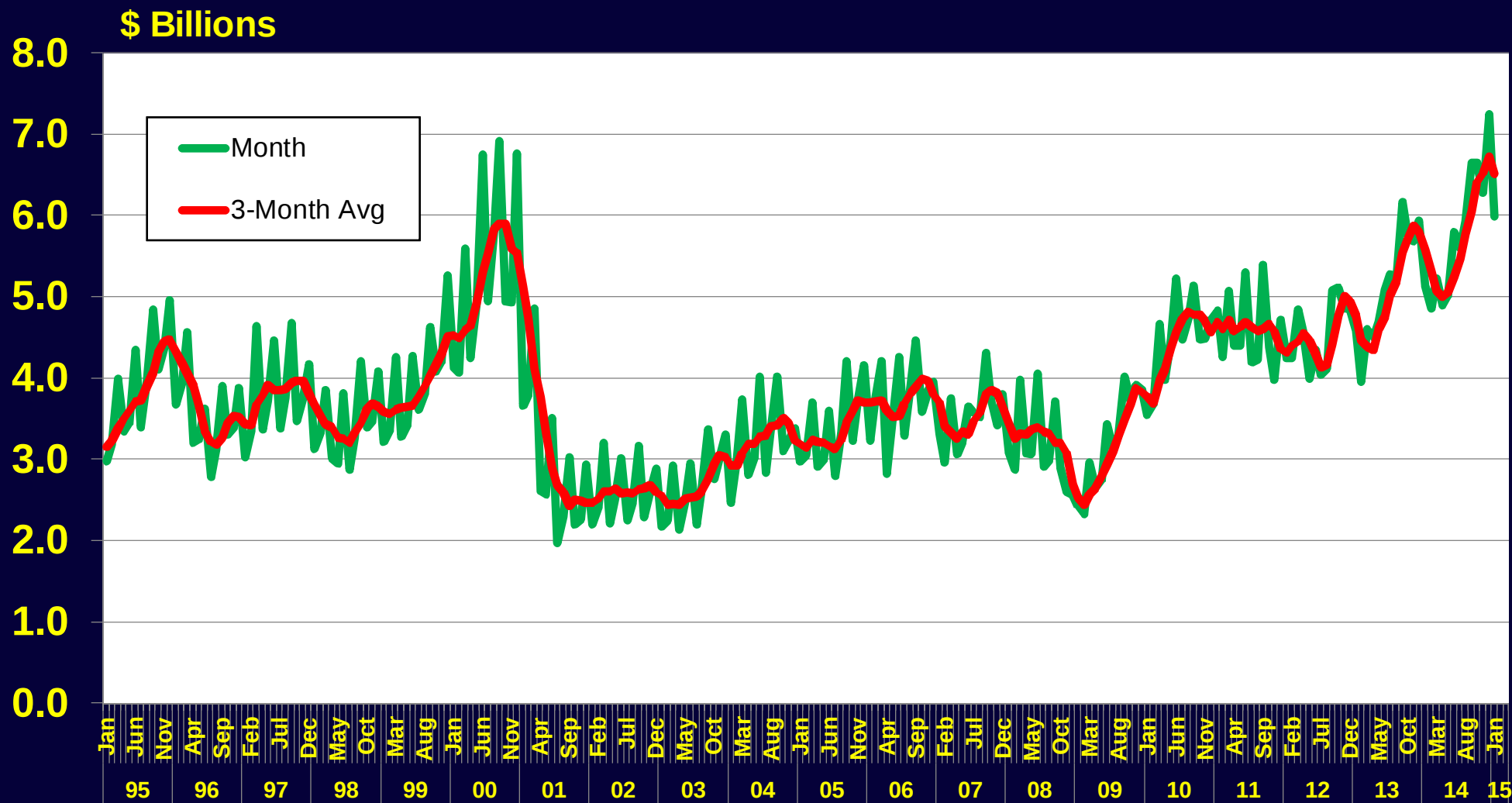
Total Semiconductor Shipments to an Area

Monthly Shipments - Reporting Firms



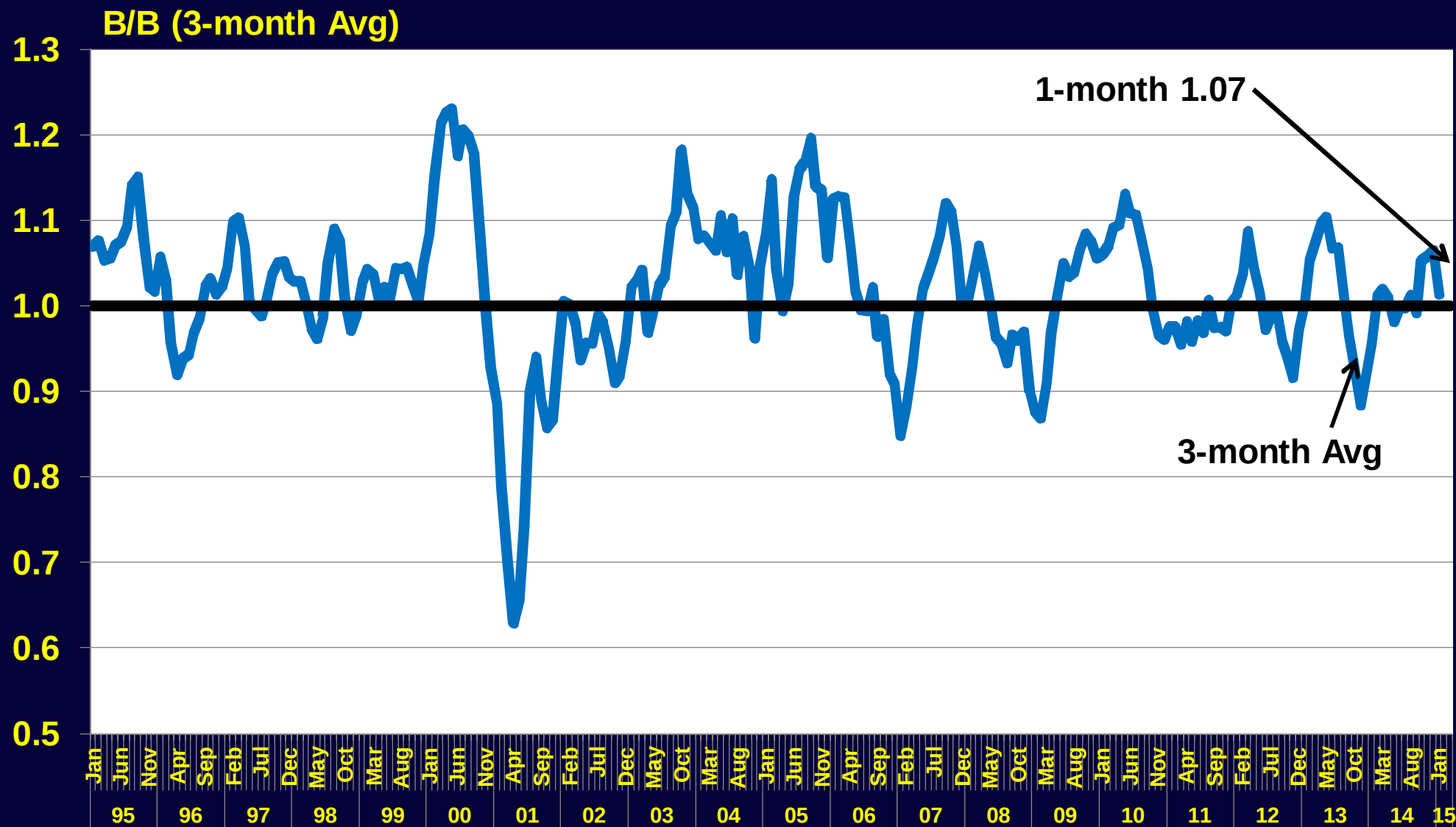
N American Semiconductor Shipments

Monthly & 3-Month Average Shipments

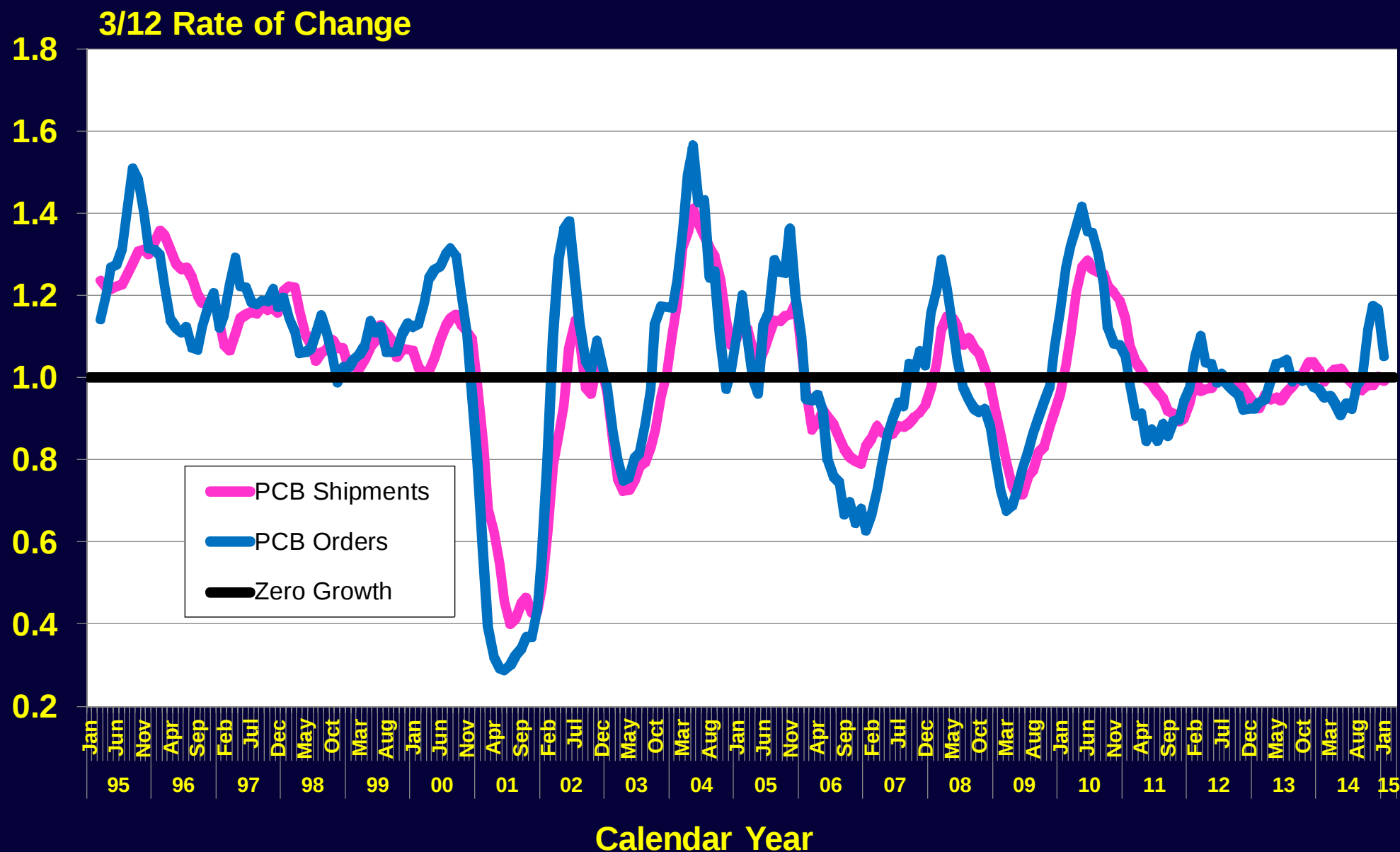


Rigid & Flexible PCB Book/Bill

N. America



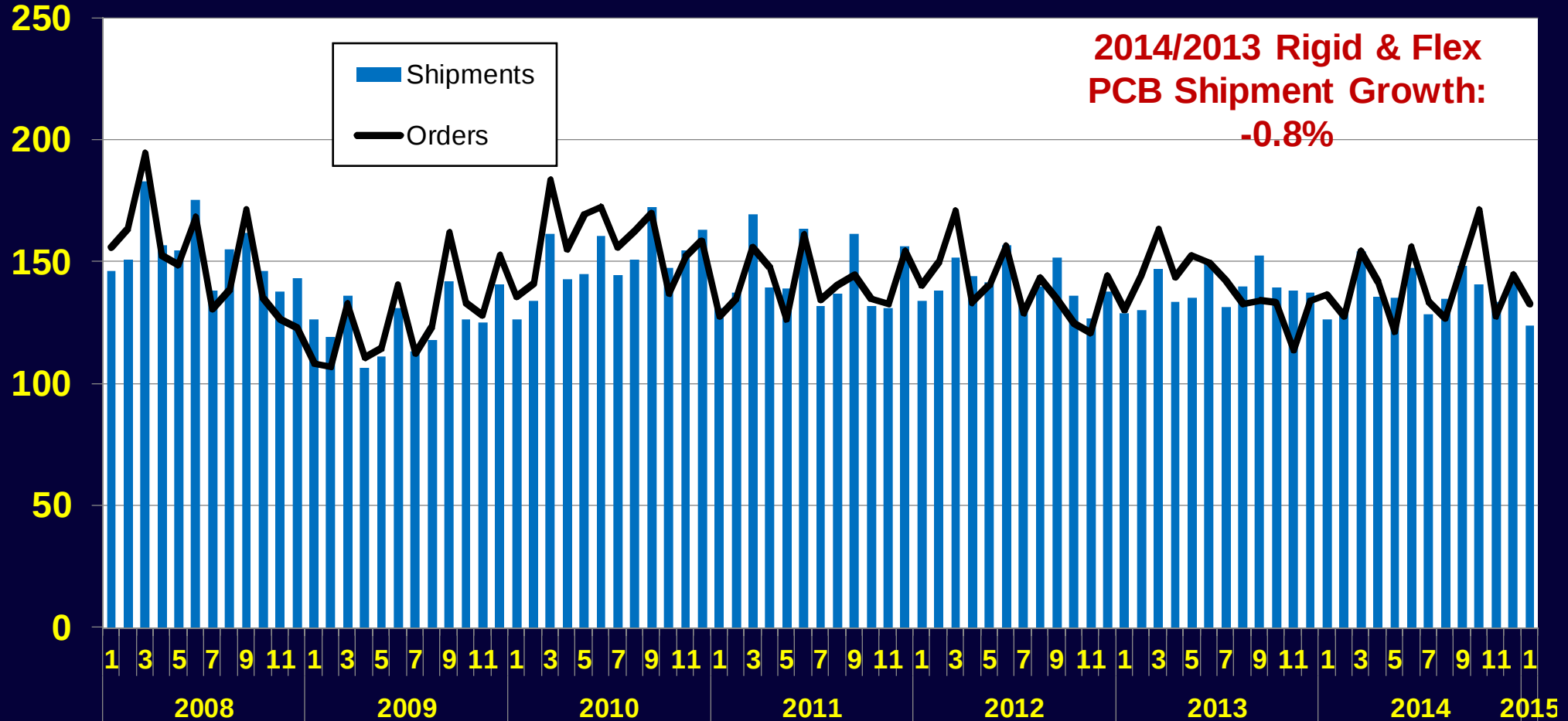
N. America Rigid & Flexible PCB Orders & Shipments



Data: IPC T/MRC & <http://www.census.gov/indicator/www/m3/>

N American Rigid & Flexible PCB Shipments & Orders

\$M (statistical sample of about 50% of producers)



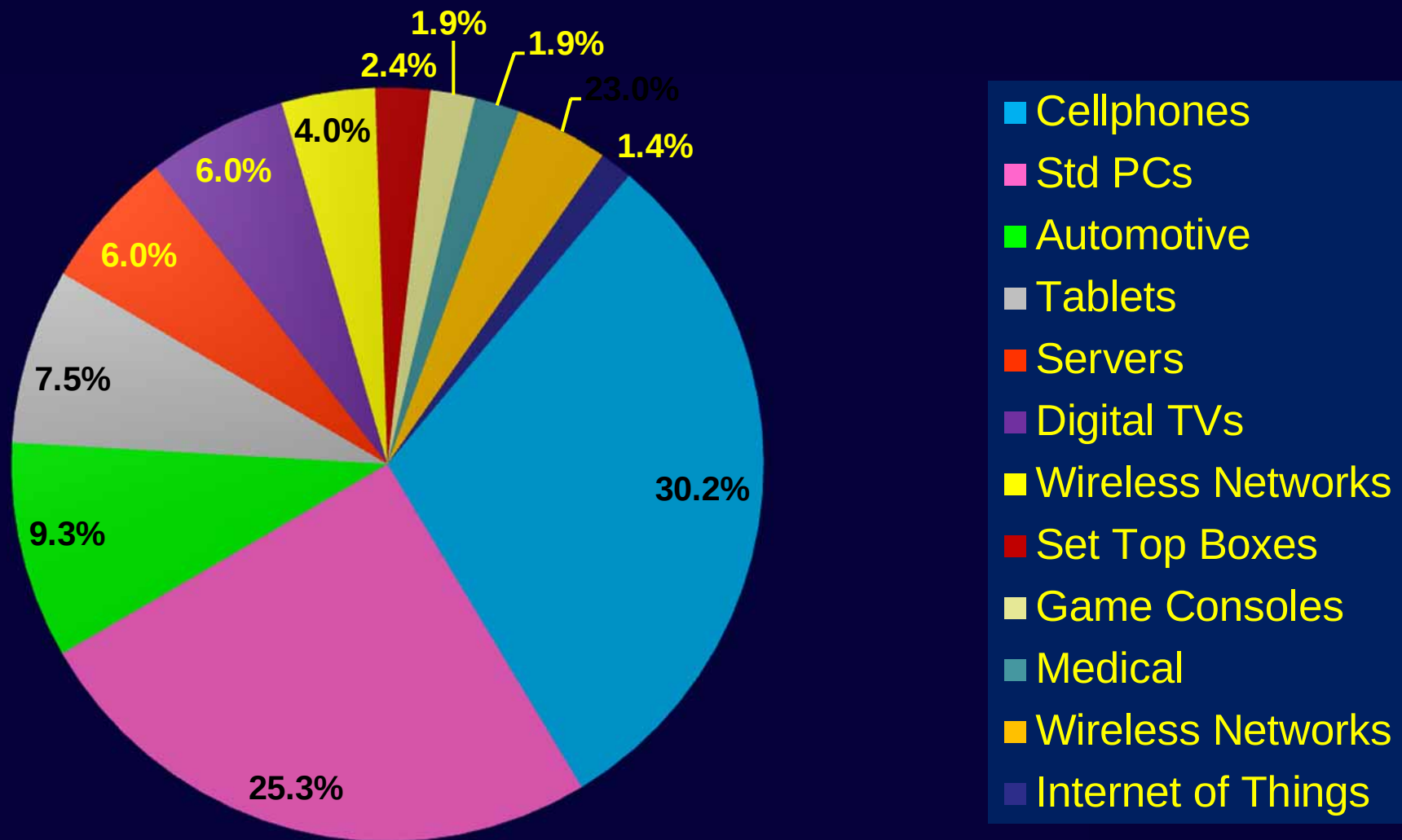
Note: IPC survey captures "market" not domestic production. About 15% of the above represents imported boards resold by N American PCB producers in survey.

Key End Use Markets Size (\$B) & Growth Rates

Product	2014 Revenue	2013-2018 CAGR %
Cellphones	265.2	5.6
Standard PCs	196	-1.1
Automotive	125	8
Tablets	85.1	10.5
Servers	52.2	1.5
Digital TVs	166	3.5
Wireless Networks	9.4	16
Game Consoles	10.5	1.5
Medical Electronics	51.1	8
Internet of Things	48.3	20

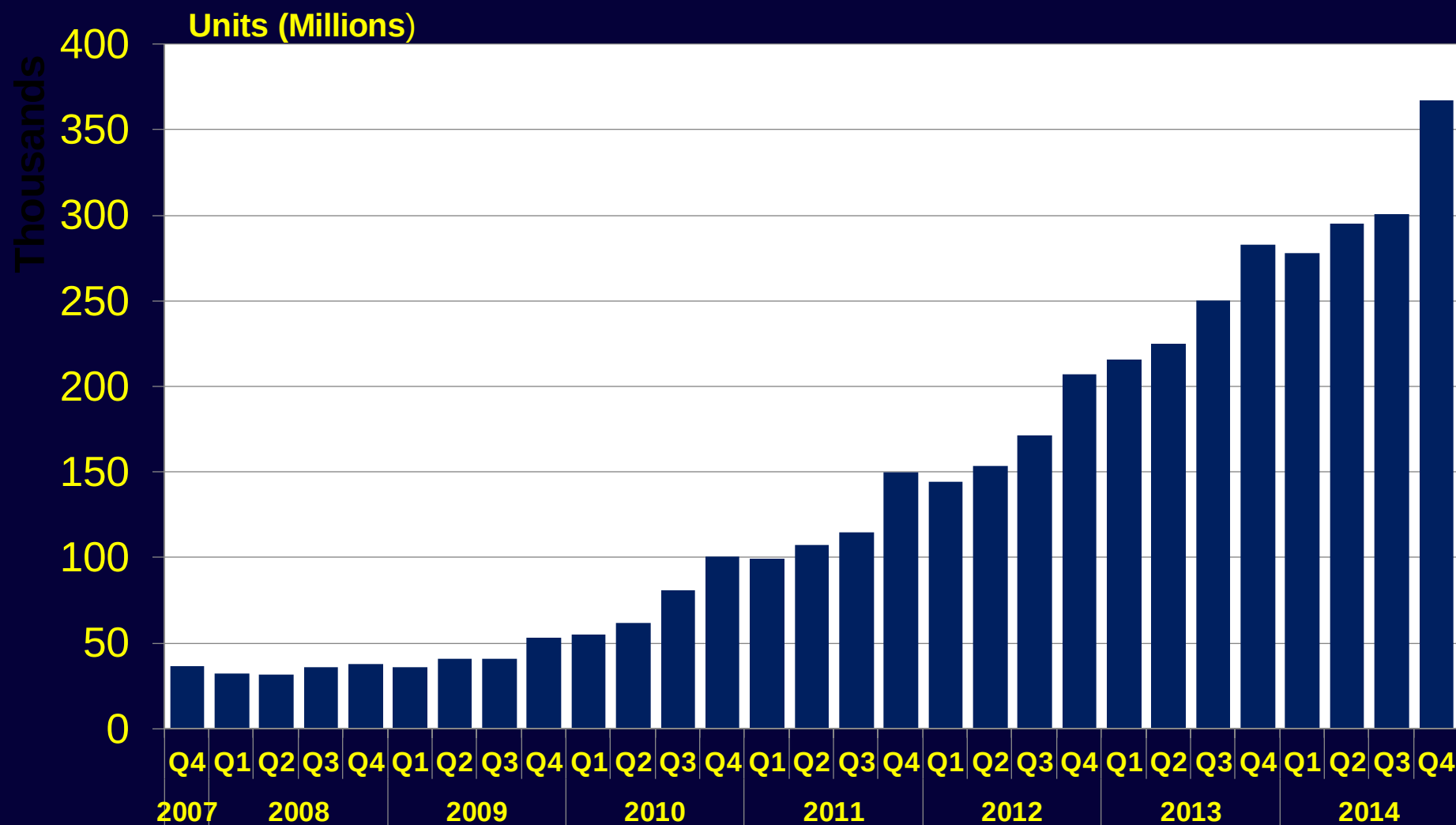
Electronic systems production value expected to grow at a 5.2% CAGR from 2013-2018 from \$1,488 billion in 2014 to about \$1.82 trillion in 2018

IC End-Use Markets - 2014



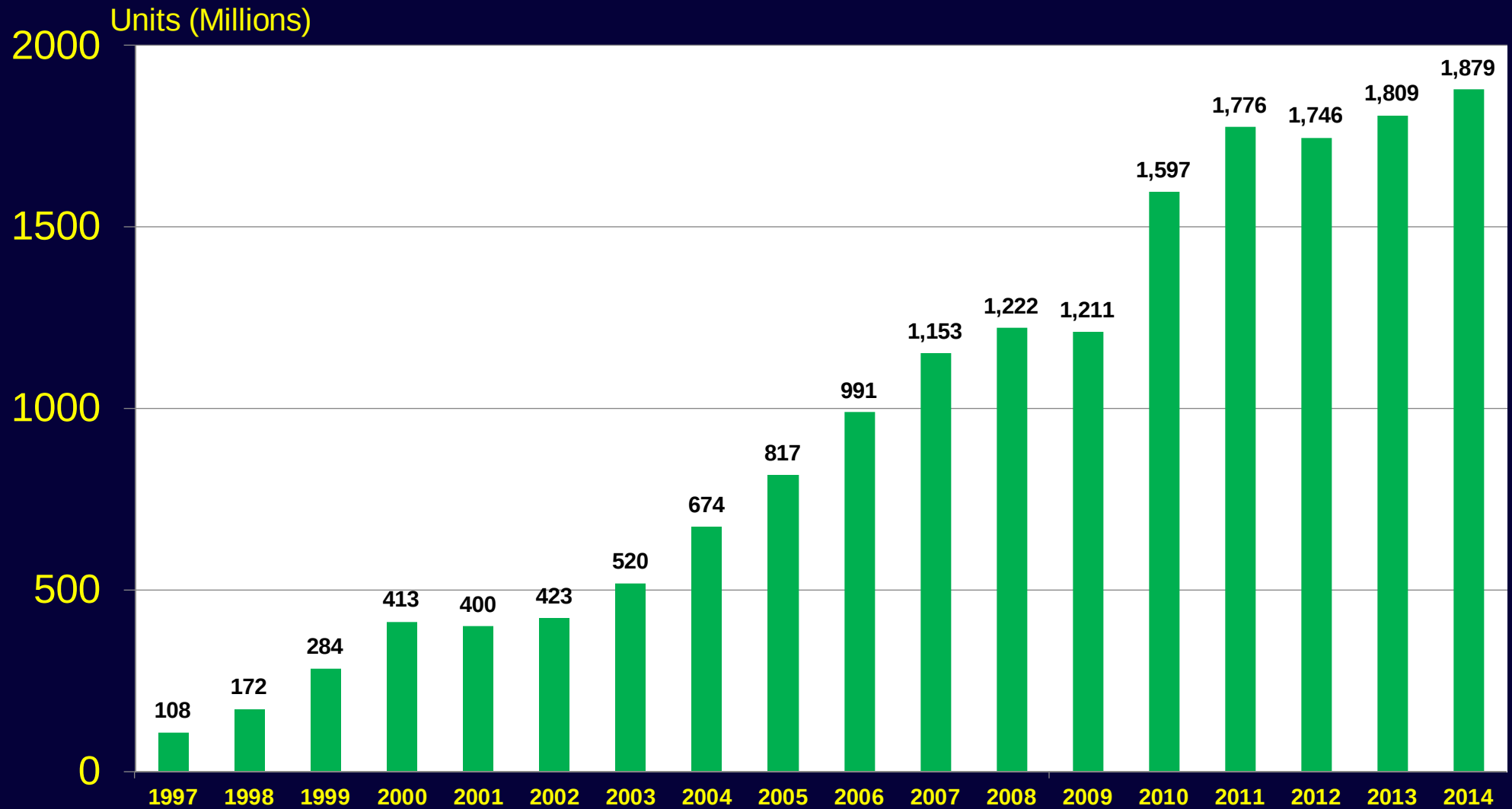
Smartphone Unit Shipments to End Users

World

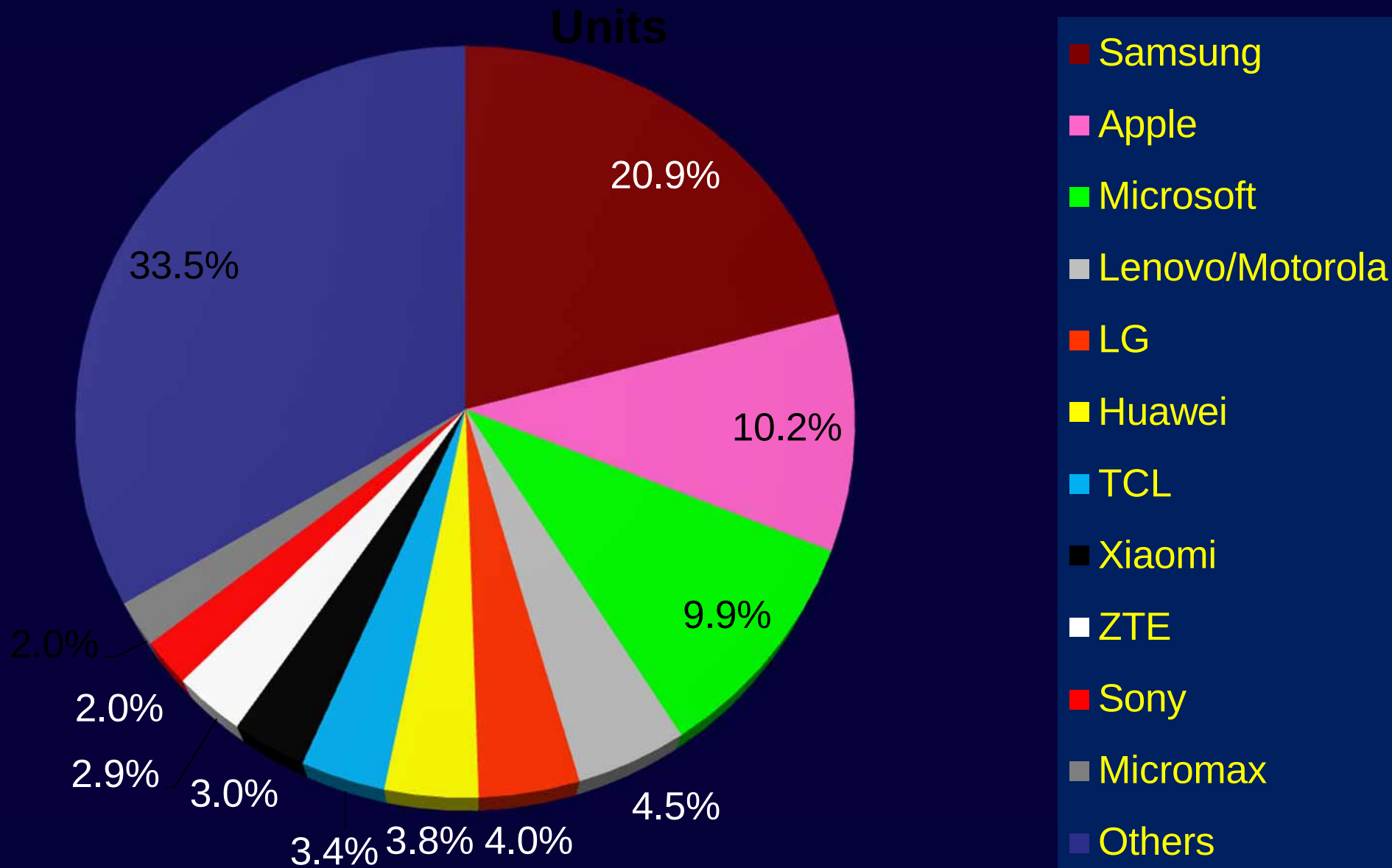


World Mobile Phone Unit Shipments

Total: Analog & Digital

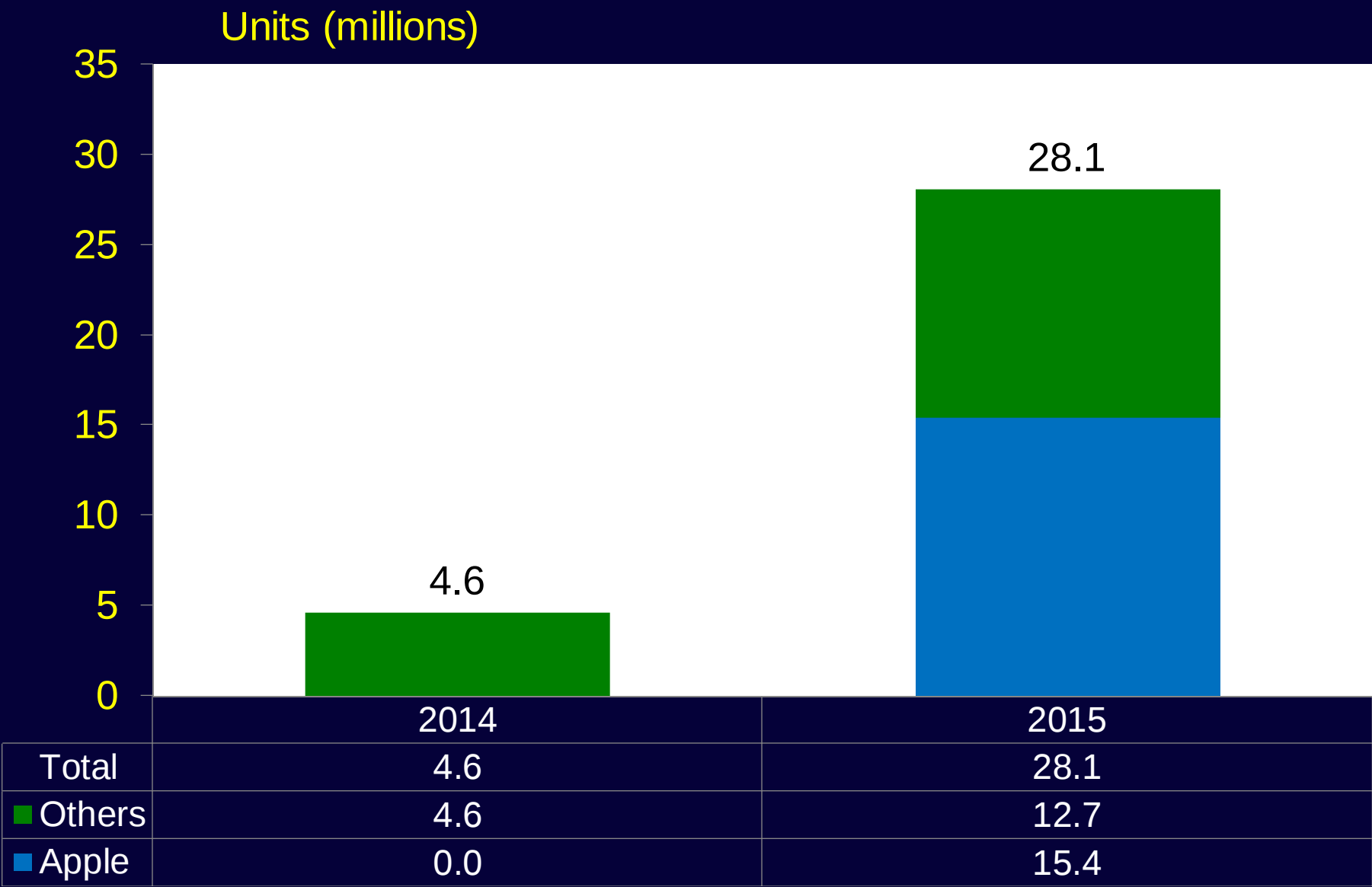


World Mobile Phone Sales to End Users 2014

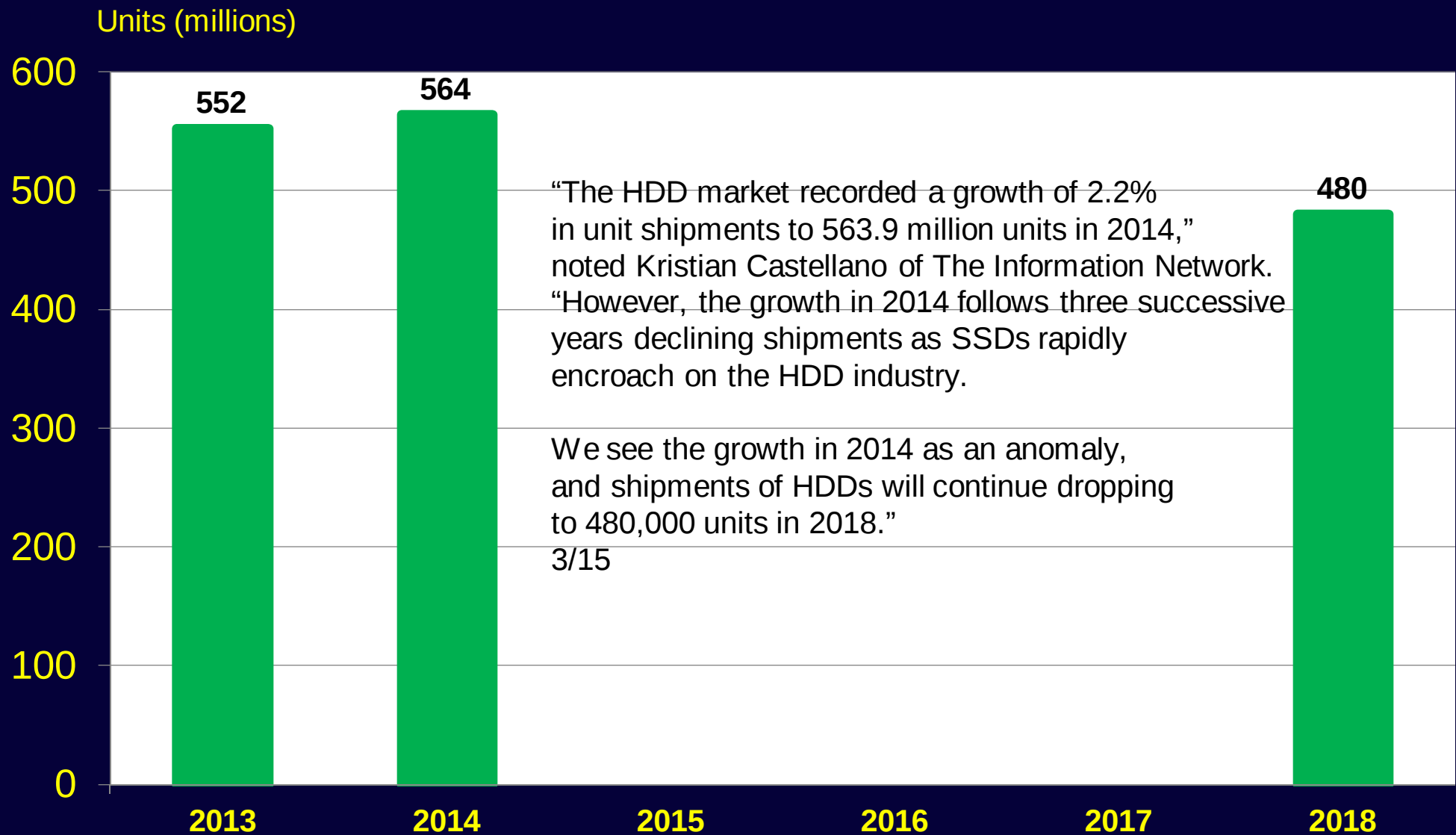


TOTAL: 1,879 Million Units

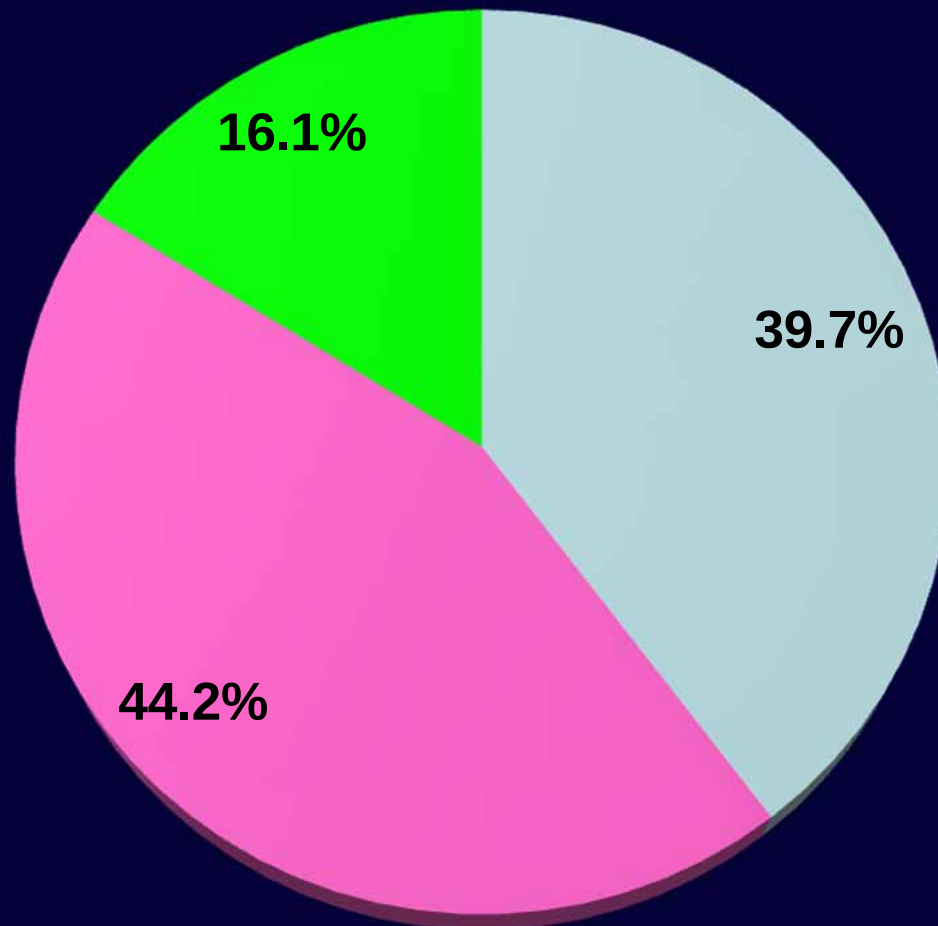
Global Smartwatch Shipments by Vendor



World Hard Disk Forecast



Hard Disk Drive Global Market Share 2014



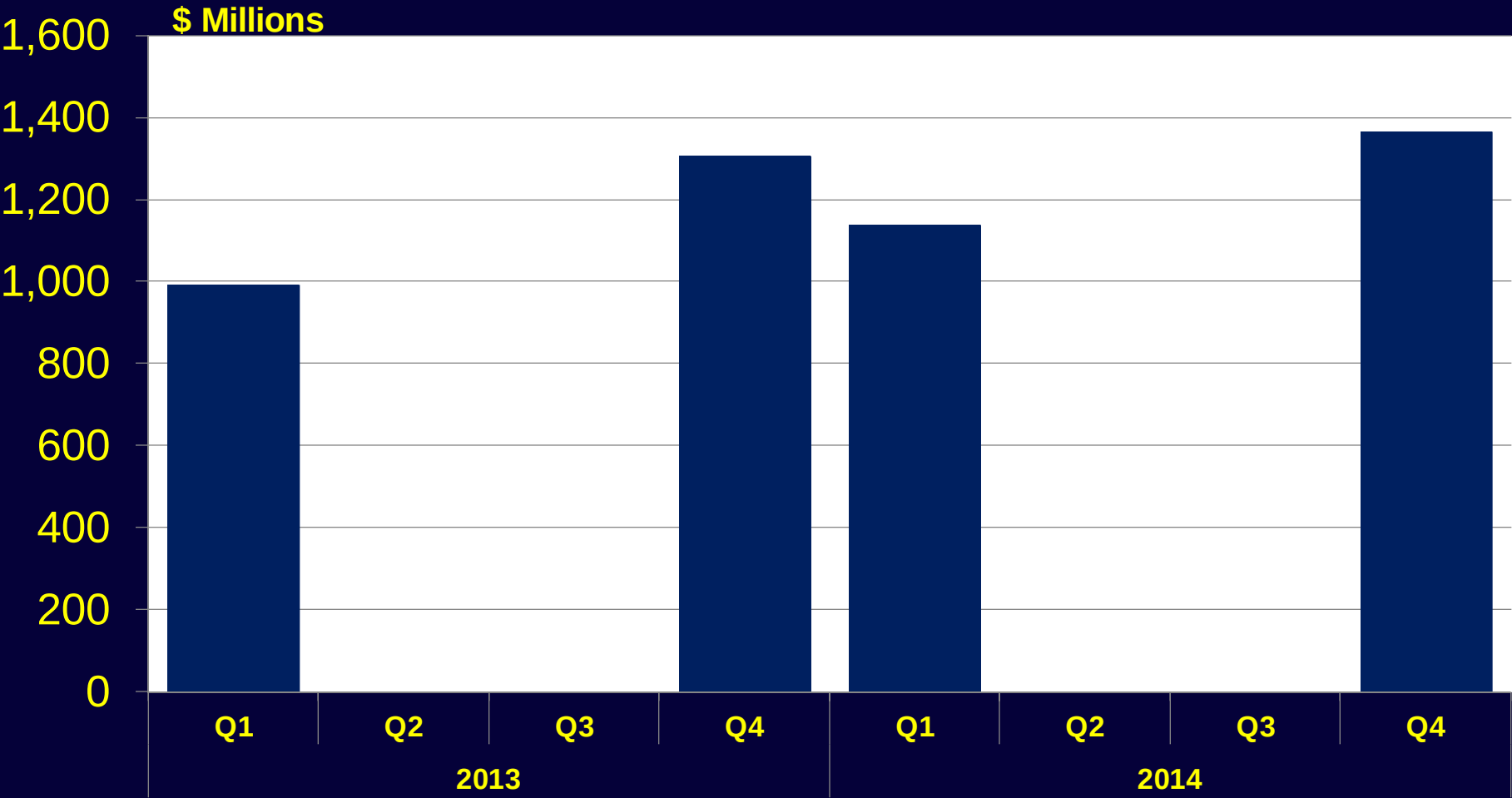
TOTAL: 564 Million Units

Top Arms Producing Companies 2013

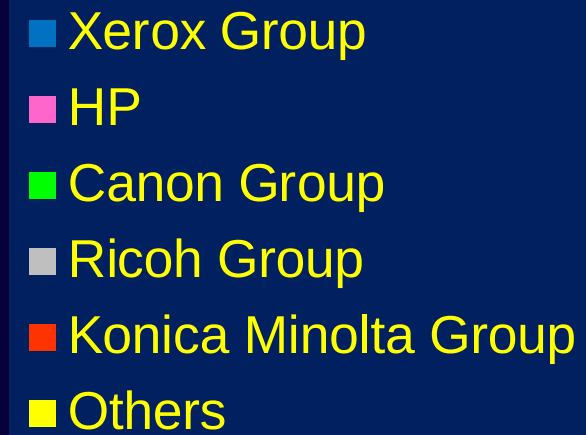
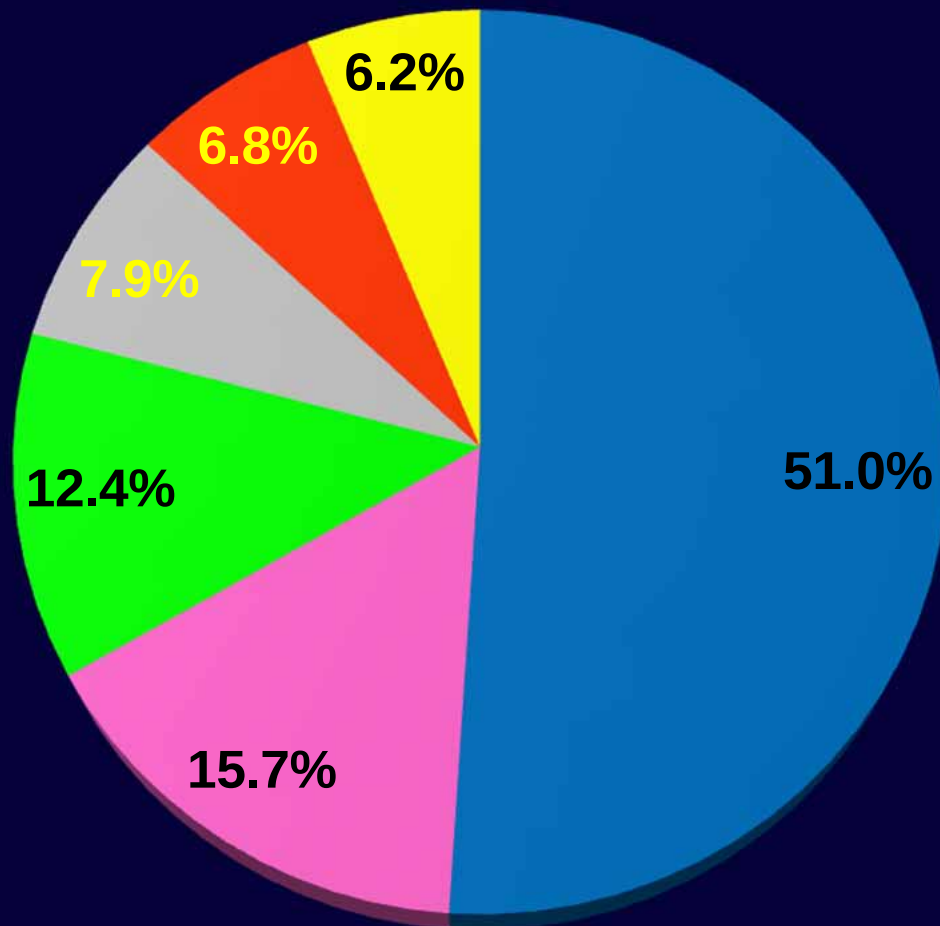
Company	Country	Arms Sales \$M	Total Sales \$M
Lockheed Martin	USA	35,490	45,500
Boeing	USA	30,700	86,623
BAE Systems	UK	26,820	28,406
Raytheon	USA	21,950	23,706
Northrop Grumman	USA	20,200	24,661
General Dynamics	USA	18,660	31,218
EADS	Trans European	15,740	78,693
United Technologies	USA	11,900	62,626
Finmeccanica	Italy	10,560	21,291
Thales	France	10,370	18,850
L-3 Communications	USA	10,340	12,629
Almaz-Antey	Russia	8,030	8,547
Huntington Ingalls	USA	6,550	6,820

World Production Printer Shipments

Revenue

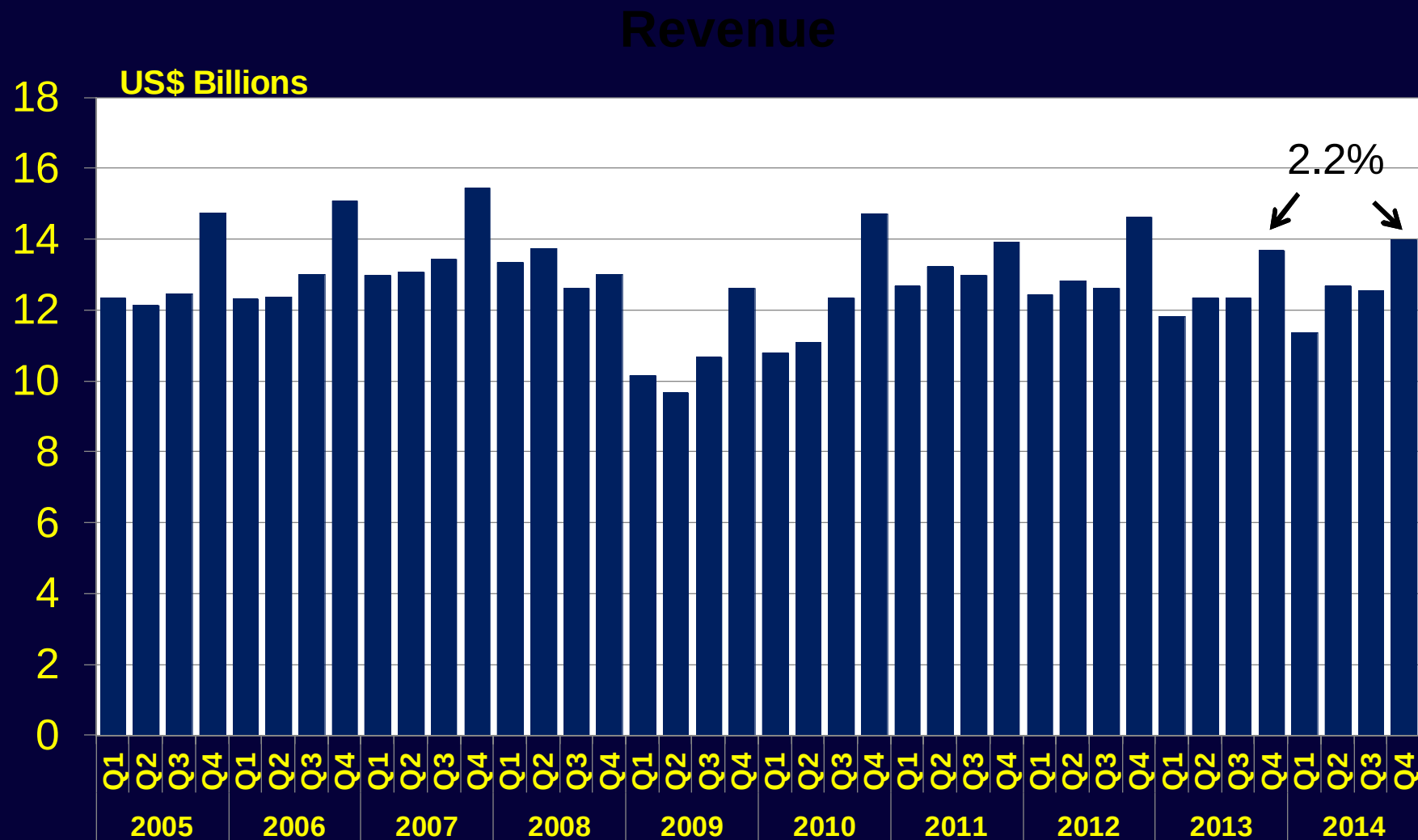


World Production Printer Shipments 4Q'14

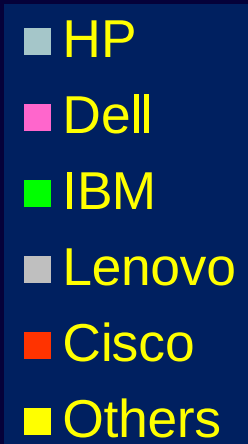
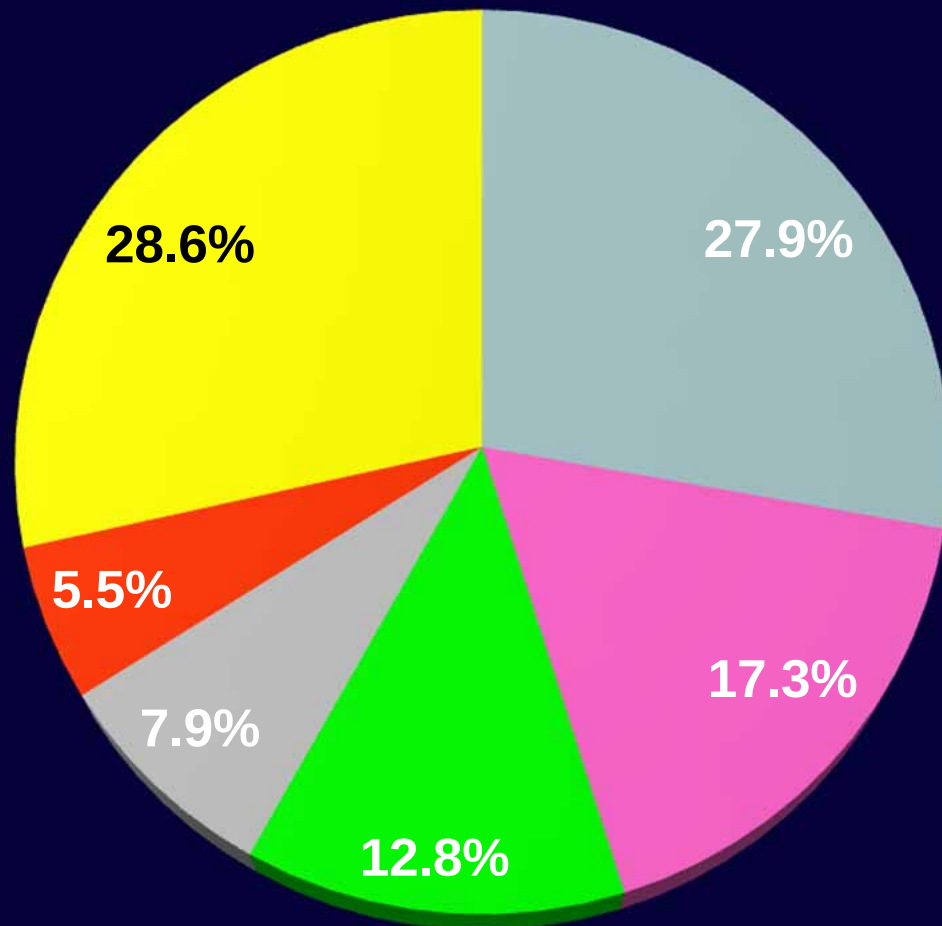


TOTAL: \$1,135 Million

World Server Shipment Revenue

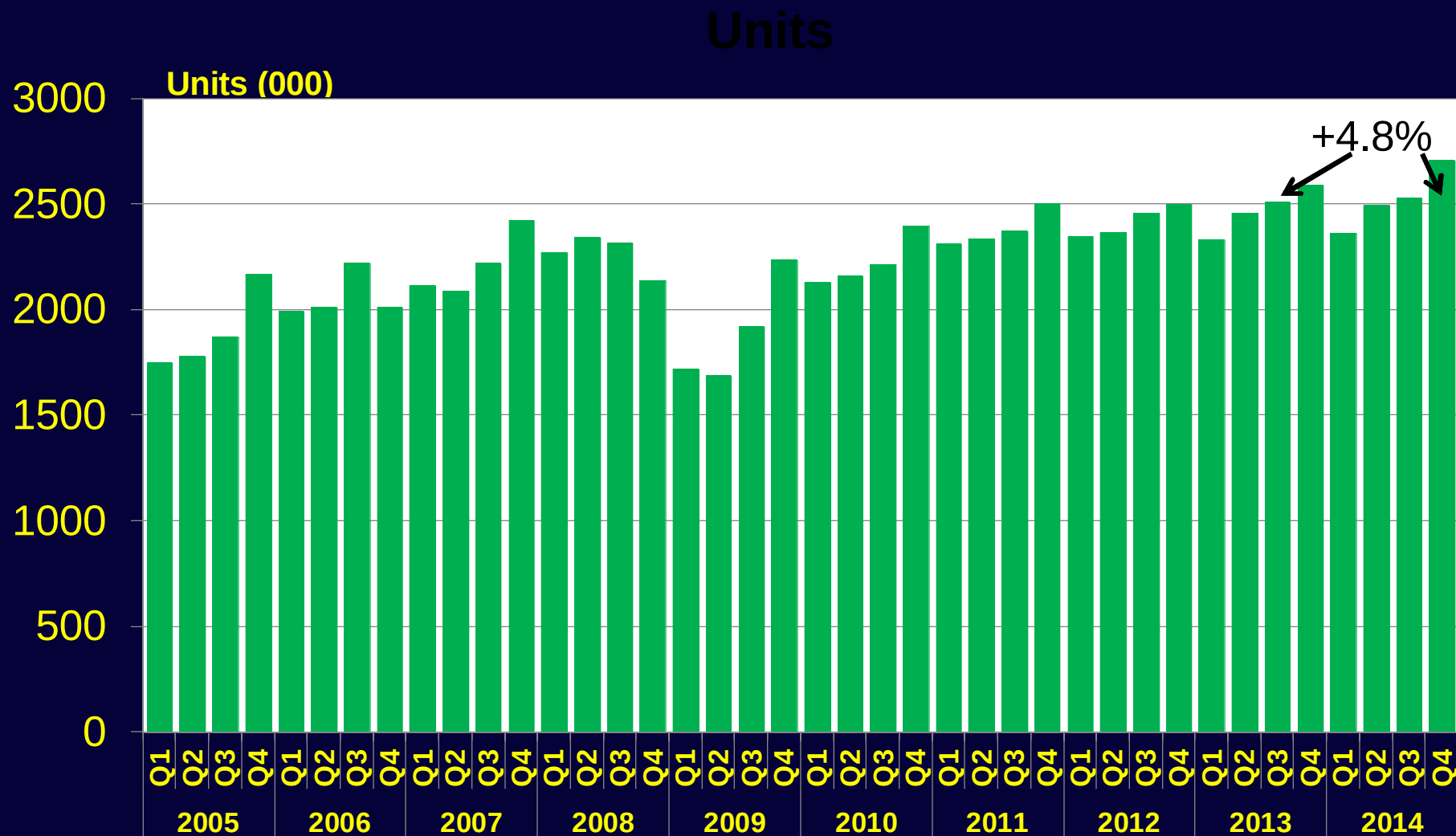


World Server Shipments 4Q'14



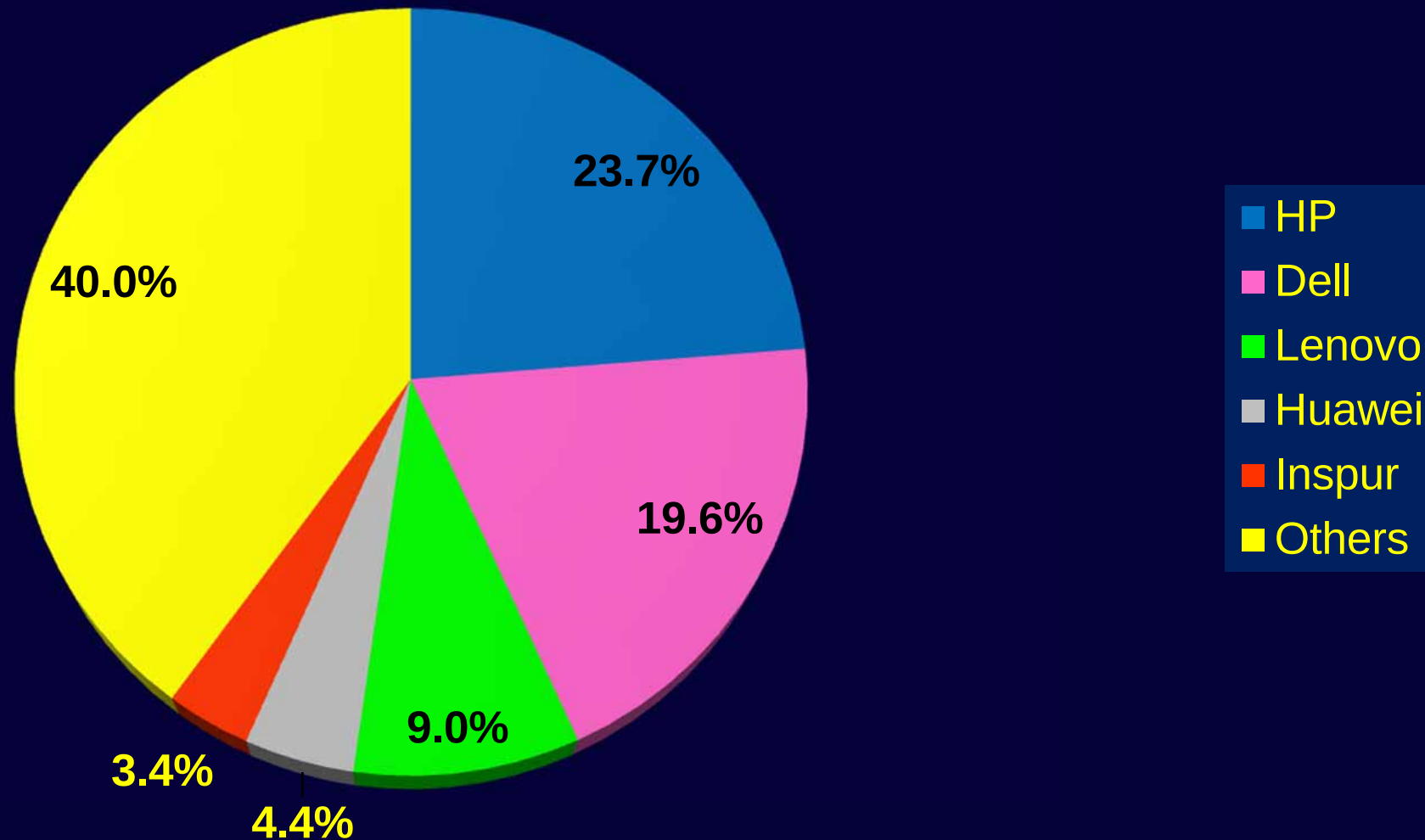
TOTAL: \$13.98 Billion

World Server Shipment Units



Gartner Dataquest 3/15 & prior reports

World Server Shipments 4Q'14



TOTAL: 2.71 Million Units