



IMI Analyst Briefing 2026 Q2

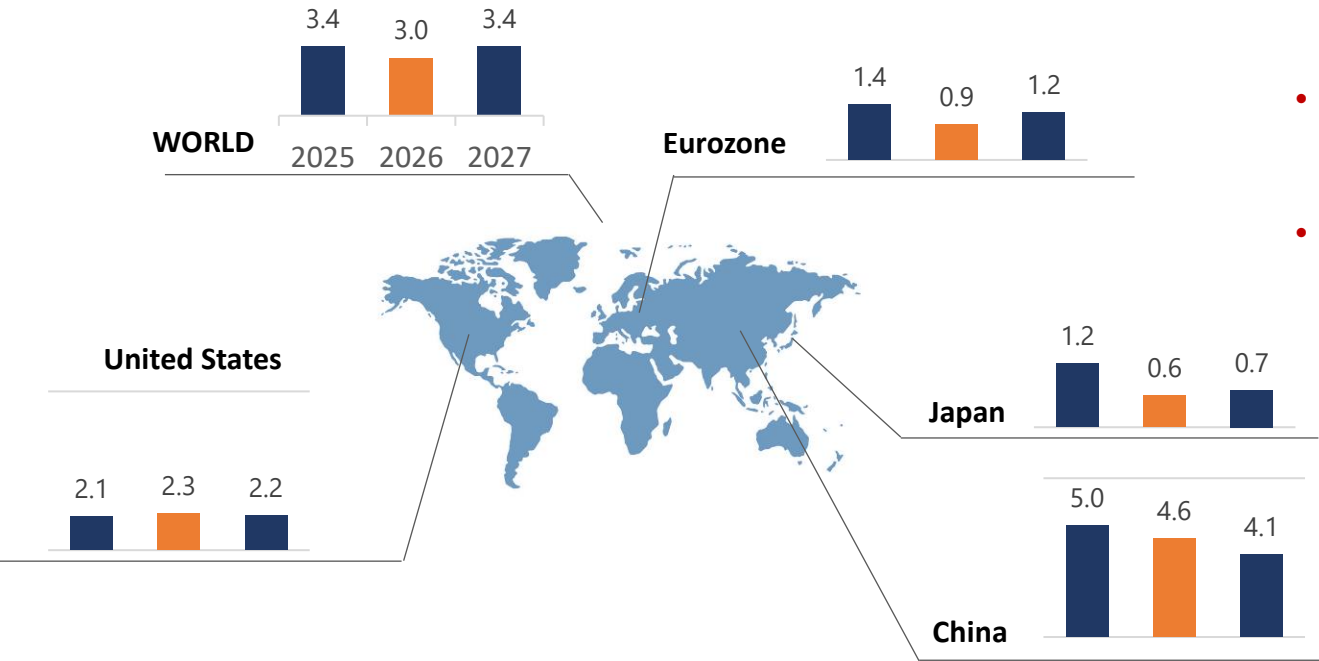
August 12, 2026
Online



Market Outlook



Economic Growth Figures



- Global growth remains resilient despite geopolitical uncertainty, supported by datacenter and tech demand
- Technology-linked economies outperforming traditional manufacturing regions
- Increased investment in digital infrastructure, power electronics, AI ecosystems

	2025	2026	2027
Global Inflation	4.1%	4.7%	3.9%

Source: IMF World Bank Outlook July 2026

CONFIDENTIAL AND PROPRIETARY. Any use or dissemination of this material without the expressed written permission of Integrated Micro-Electronics Inc. and/or AC Industrial Technology Holdings Inc. is strictly prohibited.





Mobility Market Outlook



- Camera-based safety functions, automatic emergency braking, driver monitoring systems and lane-keeping functions becoming standard on more vehicle platforms
- Vehicle electronics content continues to outpace overall vehicle production, benefiting suppliers with expertise in sensing, imaging, and safety electronics
- Industry focus is shifting from standalone sensors toward integrated vehicle platforms
- Power electronics demand remains supported by growth in electric vehicle architectures, inverters, charging systems, and energy management applications



Medical and Connectivity Market Outlook



- AI-driven datacenter investment remains one of the fastest growing electronics end markets, driving demand for power conversion and thermal management
- Medical electronics demand supported by increased adoption of integrated monitoring and diagnostic healthcare devices
- OEMs increasingly prefer strategic EMS partners capable of providing engineering support, compliance expertise, and supply chain resilience



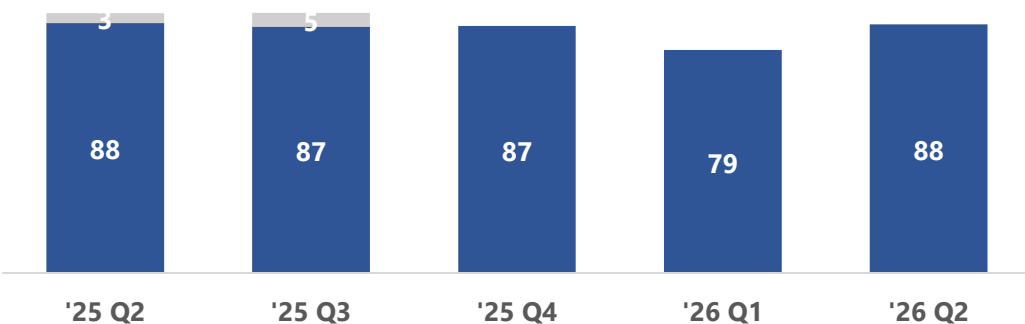
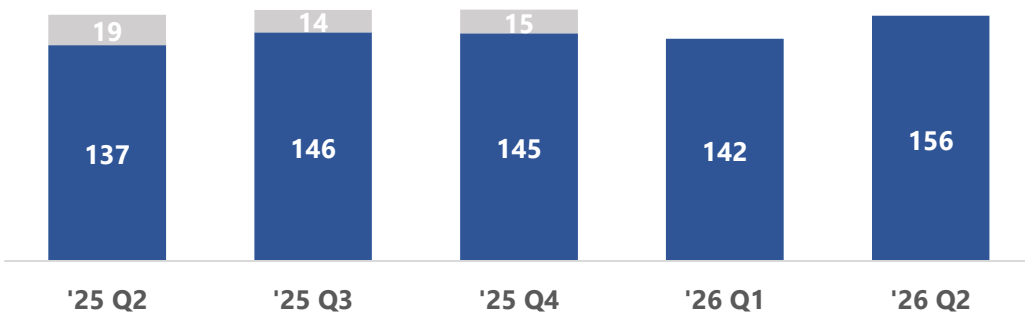
Financials



Segment Updates

CORE

VIA



➤ Mobility:

- Core Q2 Revenues +10% Q/Q ; +14% Y/Y
- Growth driven by camera, lighting, active safety, and mechatronics programs
- Growing electronic content per vehicle is offsetting muted vehicle production growth in selected regions
- ADAS adoption, driver monitoring systems and advanced lighting remain key drivers of long term demand

➤ Non-Mobility:

- Core Q2 Revenues +11% Q/Q ; flat Y/Y
- Start of production for new business in the medical segment
- Power module revenues continue to scale with several customer programs progressing through qualification and ramp phases
- Sales efforts remain focused on data centers, industrial automation, smart infrastructure, medical applications, and power modules

in US\$ Millions

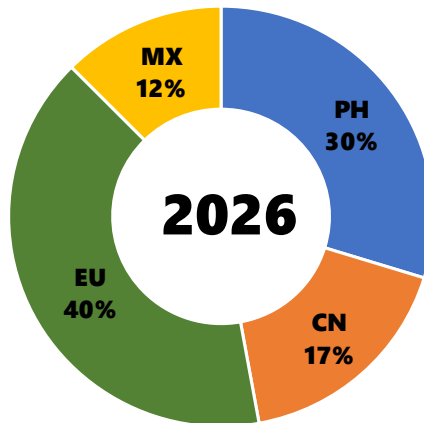
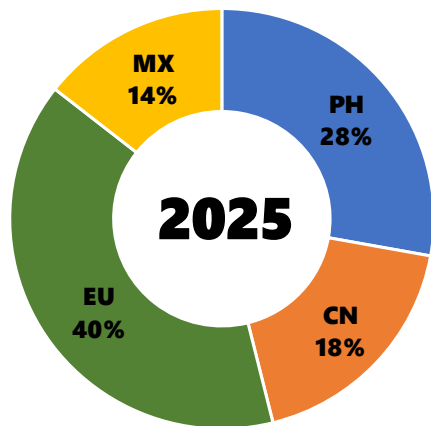
CONFIDENTIAL AND PROPRIETARY. Any use or dissemination of this material without the expressed written permission of Integrated Micro-Electronics Inc. and/or AC Industrial Technology Holdings Inc. is strictly prohibited.





Region Updates

	'25 Q2	'25 Q3	'25 Q4	'26 Q1	'26 Q2	Q/Q %	Y/Y %
PH	61.9	69.5	69.0	65.7	74.6	14%	21%
CN	41.3	47.1	39.0	40.5	41.7	3%	1%
EU	91.0	89.9	94.6	93.2	97.6	5%	7%
MX	36.8	31.2	32.2	24.8	33.9	37%	-8%



➤ Philippines:

- Continued growth in camera and power module programs highlights IMI Philippines' differentiated engineering and manufacturing capabilities
- Continued expansion of plastic injection and machining capabilities supports higher value-add content and vertical integration

➤ China:

- Streamlined footprint continues to support improved profitability and asset utilization

➤ Europe:

- Vehicle sales remain mixed across the region but increasing electronics content supports growth
- Expansion of IMI Serbia has started – collaboration with government resulted in subsidy grants

➤ Mexico:

- Q on Q revenue improvement from ramp up of new projects
- Focus remains on improving capacity utilization and growing higher margin business
- Near-term opportunities remain strong given Mexico's strategic position within North American supply chains

Core business revenues in US\$ Millions

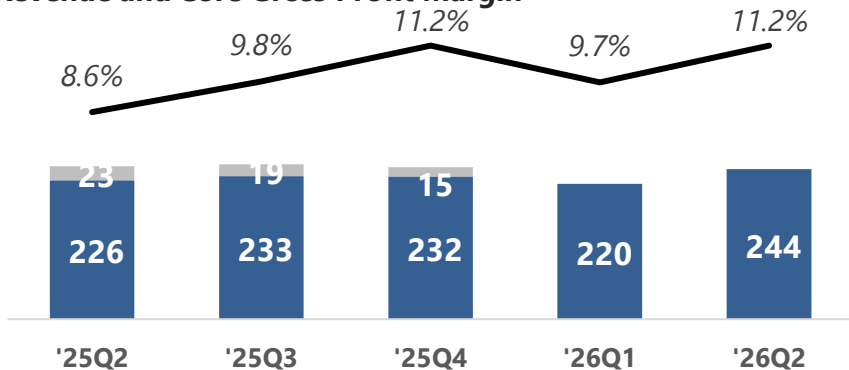
CONFIDENTIAL AND PROPRIETARY. Any use or dissemination of this material without the expressed written permission of Integrated Micro-Electronics Inc. and/or AC Industrial Technology Holdings Inc. is strictly prohibited.



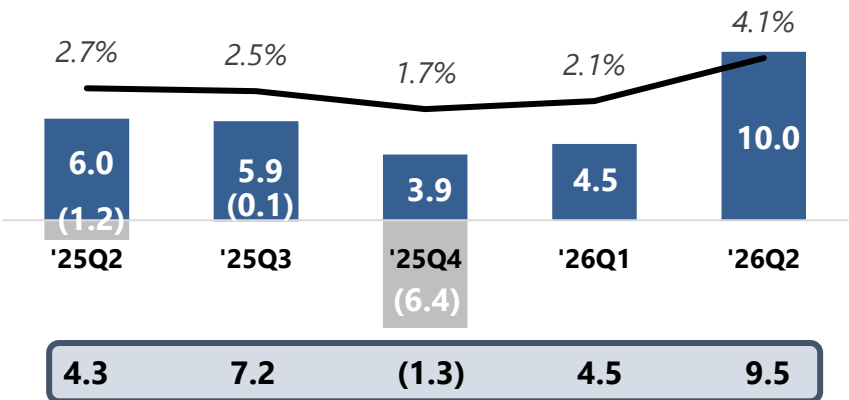


Group Performance (Non-GAAP)

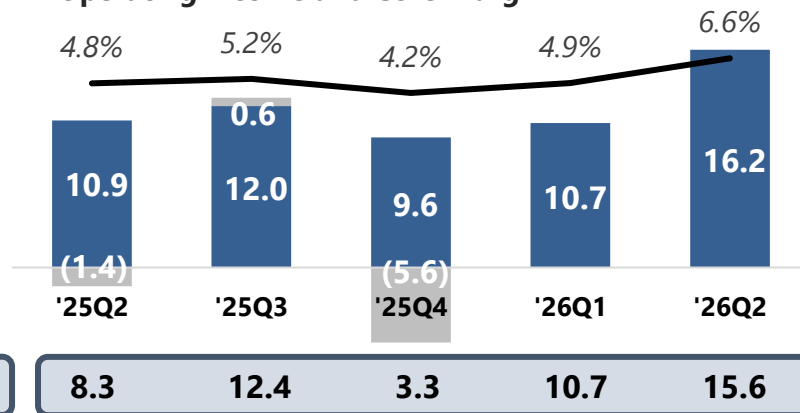
Revenue and Core Gross Profit Margin



Net Income and Core Margin



Operating Income and Core Margin



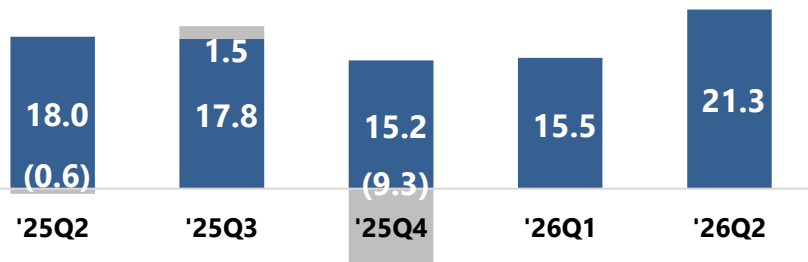
- Revenue increased 11% Q/Q and 8% Y/Y reflecting stronger demand
- Gross margin exceeded 11% as operational improvements are maintained at a larger scale
- Overhead expenses remain controlled as revenues expand



Adjusted EBITDA

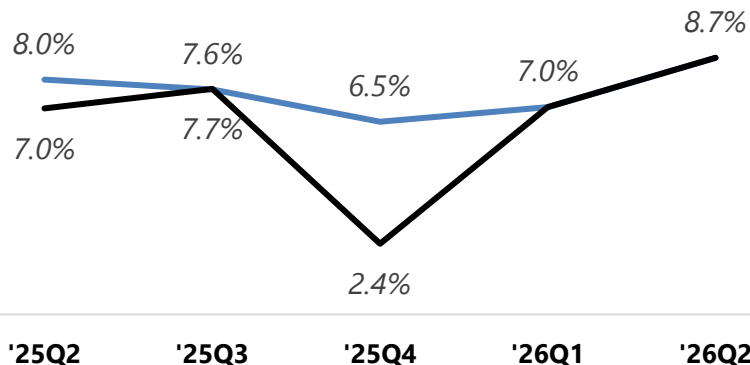
CORE

VIA



Group Reported

Adj. EBITDA%



CORE

GROUP

- Quarterly EBITDA at its highest level since 2020
- Core Q2 EBITDA +37% Q/Q ; +18% Y/Y
- Benefits from factory footprint optimization, sourcing initiatives and productivity improvements
- New business growth will be focused on programs with attractive long-term profitability and strategic value
- Improved margin profile achieved alongside revenue growth, demonstrating scalability of current operating model

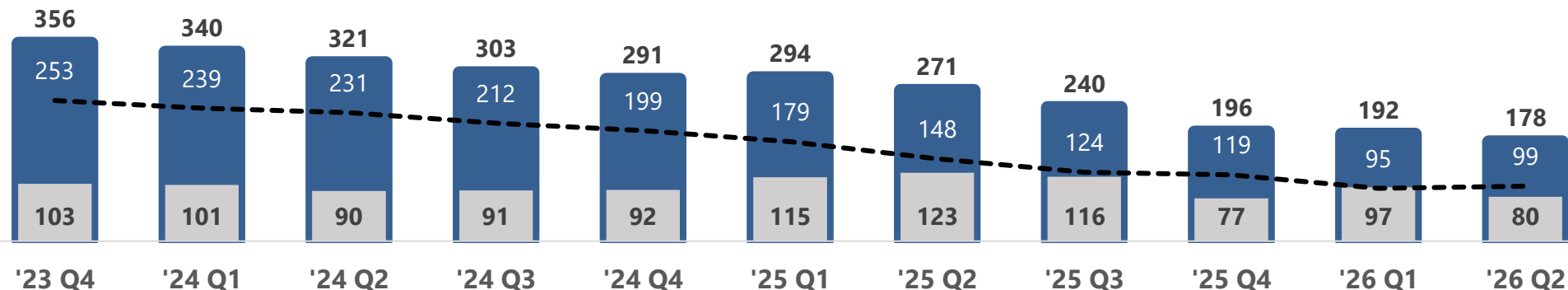


Balance Sheet

DEBT

CASH

----- Net Debt



(US\$ Millions)	Dec 2025	Jun 2026
Short-Term Debt	96.9	81.7
Long-Term Debt	99.1	96.8
Total Bank Debts	196.0	178.5
Cash and Investments	76.5	79.6
Net Debt	119.4	98.9
Common Equity Attributable to Parent	256.0	264.9

Key Financial Ratios	Dec 2025	Jun 2026
Current ratio	1.32	1.36
Bank Debt/ Total Equity	0.77	0.67
Net Debt / Total Equity	0.47	0.37
Book value/share (\$)	\$0.12	\$0.12
Book value/share (PHP)	₱6.77	₱7.36

- Net Debt remains below \$100M
- Lower leverage continues to reduce financing costs and improve financial flexibility
- Balance sheet positioned to support strategic investments and future growth initiatives
- All key financial ratios within target ranges

*Excluding Minority Interest

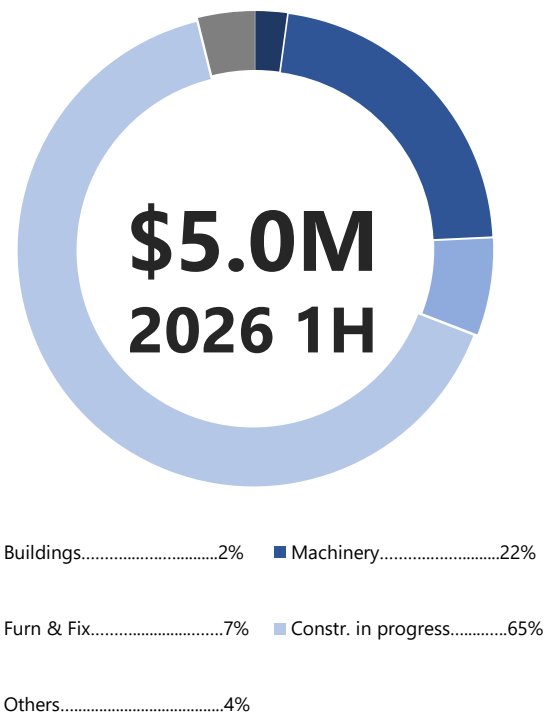
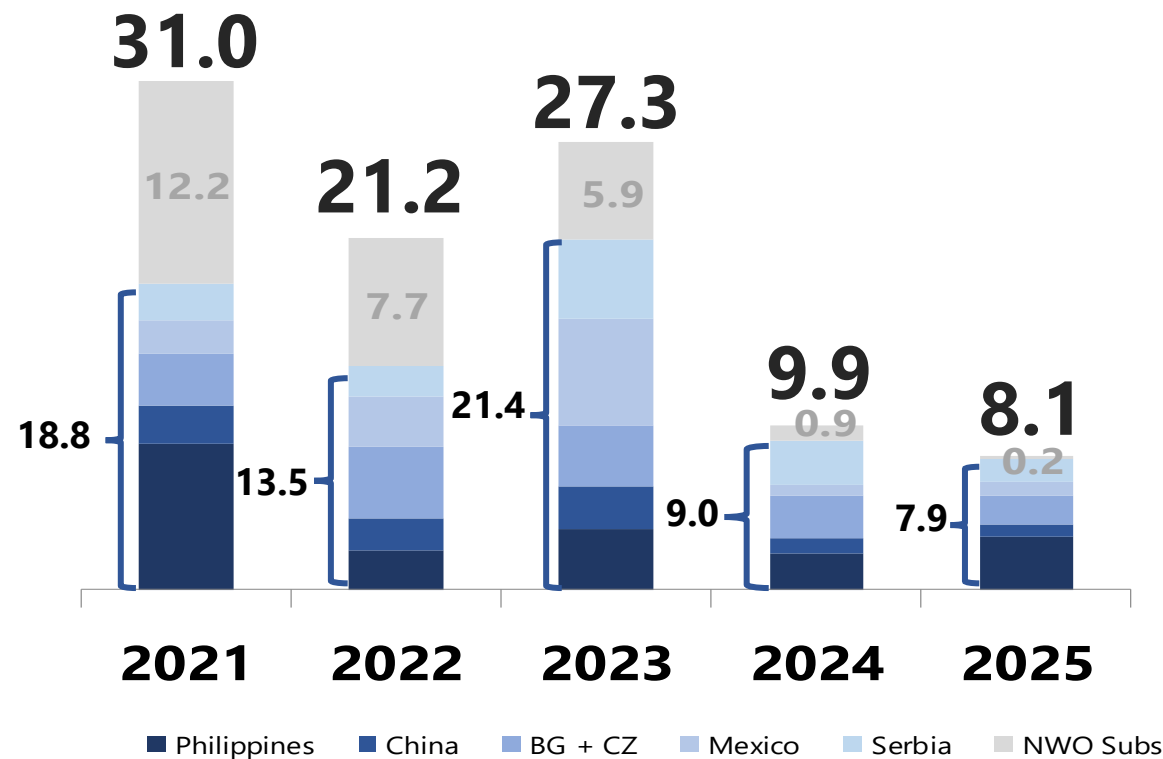
** Forex Rates at respective period close

CONFIDENTIAL AND PROPRIETARY. Any use or dissemination of this material without the expressed written permission of Integrated Micro-Electronics Inc. and/or AC Industrial Technology Holdings Inc. is strictly prohibited.





Disciplined Capital Investments



in US\$ Millions

CONFIDENTIAL AND PROPRIETARY. Any use or dissemination of this material without the expressed written permission of Integrated Micro-Electronics Inc. and/or AC Industrial Technology Holdings Inc. is strictly prohibited.





Key Takeaways

➤ Revenue Growth and Margin Expansion

- Revenue increased both quarter-on-quarter and year-on-year
- Gross profit, operating income, EBITDA and net income margins all showed significant improvement
- Profitability growth continues to outpace revenue growth as operational initiatives prove scalability

➤ Growth Markets

- Camera systems, advanced lighting, and mechatronics remain attractive long-term automotive opportunities
- Industrial automation, smart infrastructure, medical technologies, and data-center applications to support diversification into higher margin segments
- Power module packaging continues to develop into an increasingly meaningful growth platform
- Cornerstone plastic injection projects have been secured, showcasing vertical integration and improving operational value-add across all regions

➤ Simpler and More Robust Business

- Streamlined footprint and greater commercial discipline continue to enhance resilience
- Net debt remains below \$100M with consistently strong cashflow generation
- Balance sheet well positioned to support future growth and expansion beginning with Serbia extension



Q&A



**YOUR GLOBAL
TECHNOLOGY
SOLUTIONS PARTNER**



connect with us