Stock Code: **7828**

INNOS 創新服務股份有限公司

Innostar Service Inc.

Q3 2026 Operations Overview & Outlook

2026/11

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INNOS
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1.Company Overview & Philosophy

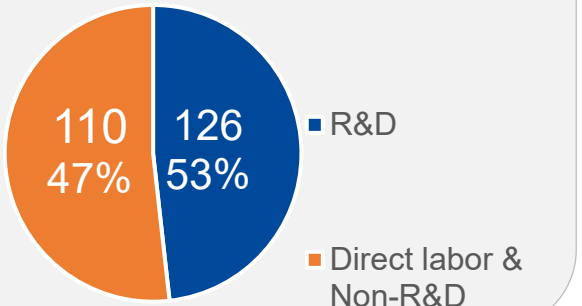
INNOS empowers your manufacturing process and product innovation with expert, end-to-end solutions

Company Overview

INNOS® 創新服務股份有限公司
InnoStar Service, Inc.

- **Established: 2004**
- **Capital:** NTD 405 million
- **Employees:** 236
- (as of October 2026)
- **Locations**
  - Hsinchu Plant
  - Taichung Headquarters
    (Xing'an & Zhongshan plants)
  - Kaohsiung Office
- **Core Businesses**
  - Development, manufacturing, and sales of semiconductor automation equipment
  - Advanced packaging solutions
  - Development, manufacturing, and sales of advanced packaging components
  - Probe card repair services and sales of related materials

R&D talent accounts for **53%** of total headcount.





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Key Milestones

2004
- Company established
- Launched first-gen automatic plastic lens-cutting machine
- **Pioneered automation revolution for optical industry**

2014
- **Expanded into advanced semiconductor testing, developed MEMS Probe Card Assembly Equipment for wafer testing**
- **Pioneered automation revolution for probe card industry**

2016
OEM service of MEMS probe assembly for leading foundries, having processed more than 300 million units

2022
Auto Probe Assembly Machine adopted by leading probe card makers

2024
High-density Cu Pillar applied to WIFI modules with substantial sample shipments

Probe Assembly Machine adopted at scale by probe card makers



2025
High-density Cu Pillar applied to power modules, TGV, and PLP modules

- **Technoprobe became strategic investor**
- **Launched comprehensive MEMS probe card automation solutions**



2026
High-density Cu Pillar modules entered mass production.
Listed on the TPEx on April 22, 2026

- **Expanded the MEMS probe card equipment portfolio with 11 machines.**
- **Completed the setup of an automated probe card repair line.**

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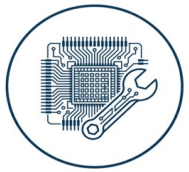
2. Industry & Operations Overview

INNOS: Three Pillars for Operational Growth



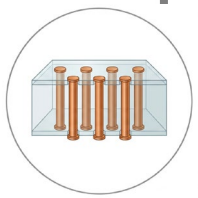
Semiconductor MEMS Probe Card Automation Equipment – Accelerated Growth in 2027

- Strong shipment growth expected for the Dual-arm Probe Assembly Machine and repair equipment
- Mass shipments of other repair equipment to begin in Q2 2027



Probe Card Material Kits & Repair Service – Expanded Output in 2027

- Supporting TP's probe card business expansion to target new ASIC customers
- Expanding the full-scale probe card repair line in Q1 2027 to grow repair services



Cu Pillar Modules & TGV– Growth Momentum Expected in Q4 2028

- Cu pillar module orders expected from late 2026, with mass production beginning for power modules and wearable earbud communication modules
- Target: mass production of TGV-ICP glass substrates by late 2028 for AI chip ABF packaging substrates

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INNOS' Three-Pillar Product Lines in 2026

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#			MEMS Probe Card Solutions	Customers	2026 Q1	Q2	Q3	Q4
1.	Automated Probe Card Equipment	1.	1st wave- Dual-arm Probe Assembly Machine	Probe card manufacturers	→	→	→	→
		2.	2nd wave - Probe Card Repair Lineups: Probe Replacement, Probe Reshaping, Probe Inspection, Laser Cleaning, Sorting & Alignment, and Auto Probe Tweaking Machines.	Probe card manufacturers		→	→	→
		3.	3rd wave- Auto Probe Analyzer and Auto Reforming Machine, etc.	Probe card manufacturers			To be shipped in 2027	
	AI Chip Substrate Repair Equipment	4.	Auto ABF Substrate Inspection Machine and Laser Repair Machine	Substrate manufacturers			Tested and Verified →	
2.	Material Kits & Contract Service	1	Probe Card Contract Service: pin insertion/reshaping/sorting & measurement & arrangement	Probe card manufacturers		Contract service continues →		
		2.	Sales of Probe Card Material Kits	Probe card manufacturers			DOE cards shipped →	
3.	Cu Pillar Products	1.	Cu Pillar Modules: AiP, power modules	OSATs Antenna module vendors Power supply IC vendors			Mass Production in late 2026 →	
		2.	TVG-ICP (Cu pillar inserted) core layer substrates	Chipmakers			NTI New Technology Verification →	

1.MEMS Probe Card Manufacturing Equipment: 11 fully automated machines developed, with 3 more in development, bringing the total to 14 advanced machines.

Manufacturing / Inspection / Repair / Analysis Full Line Solution













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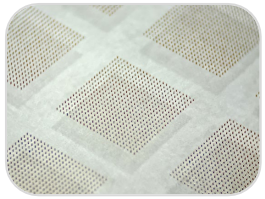
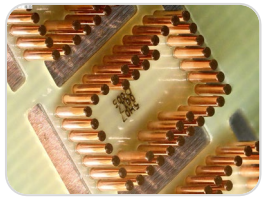
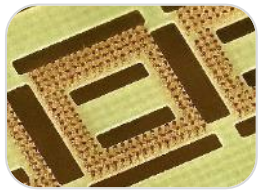
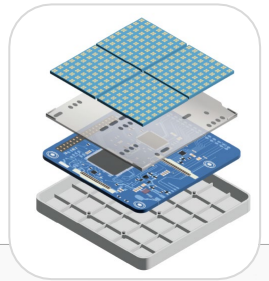
3. High-Density Cu-Pillar TGV & Module Products

Products	Customers	Progress
TGV High-Speed Transmission Module   	Two major IC manufacturers	• **Mass production expected after 3Q28**
AI Power Module   	OSATs Power component providers	• **Mass production by 2027**
RF / Networking and Communications   	European electronics manufacturers Antenna module providers	• **Mass production by 2027**

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3. 3Q26 Performance & Outlook

Operating Performance

Unit: NT$ in Thousands

	September 30, 2026	December 31, 2025
Cash and Cash Equivalents	952,746	413,366
Current Financial Assets at Amortized Cost	2,972,600	294,930
Net Accounts Receivable	534,549	321,460
Inventories	602,737	211,002
Property, Plant and Equipment	1,390,900	404,539
Total Assets	**6,596,440**	**1,742,594**
Current Contract Liabilities	639,267	79,033
Accounts Payable	347,026	103,598
Long-term Borrowings	0	171,291
Total Liabilities	**1,247,220**	**550,679**
Common Stock	405,319	366,859
Total Equity	**5,349,220**	**1,191,915**
Book Value per Share	**131.98**	**32.49**

1. Cash equivalents and time deposits totaled NT$3.925 billion.
2. Debt ratio of only 19%, with no bank borrowings.
3. Significant increase in inventory, primarily due to raw material stockpiling; 79% of inventory consists of raw materials and work-in-process.
4. Contract liabilities totaled NT$639 million as of the end of September.

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Operating Performance

Unit: NT$ in Thousands

	July 1–September 30, 2026		First Half of 2026		FY2025	
Operating Revenue	**442,825**		**511,463**		**716,233**	
Operating Costs	95,175		105,141		170,092	
Gross Profit	**347,650**	**79%**	**406,322**	**80%**	**546,141**	**76%**
Selling Expenses	8,481	2%	18,950	4%	21,734	**3%**
Administrative Expenses	49,396	11%	69,960	14%	90,824	13%
R&D Expenses	72,302	16%	115,496	22%	154,341	21%
Expected Credit Impairment Losses (Gains)	10,606		455		917	
Operating Income	**206,865**	**47%**	**201,461**	**39%**	**278,325**	**39%**
Net Income for the Period	166,683	38%	172,564	34%	227,671	32%
Basic Earnings per Share	4.12		4.52		6.33	
EBITDA Margin	49%		46%		43%	

1. Gross profit margin, operating margin, net profit margin, and EBITDA margin remained strong.
2. Continued investment in R&D, with the expense ratio declining as revenue grows.

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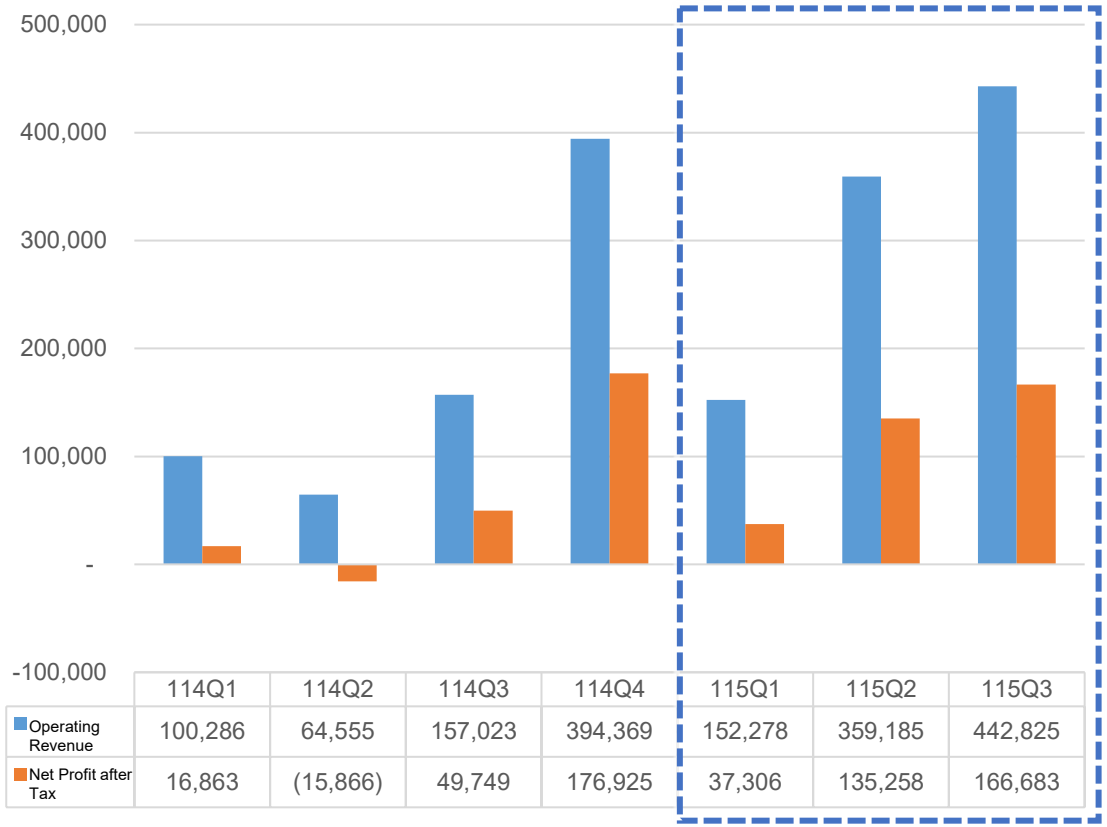
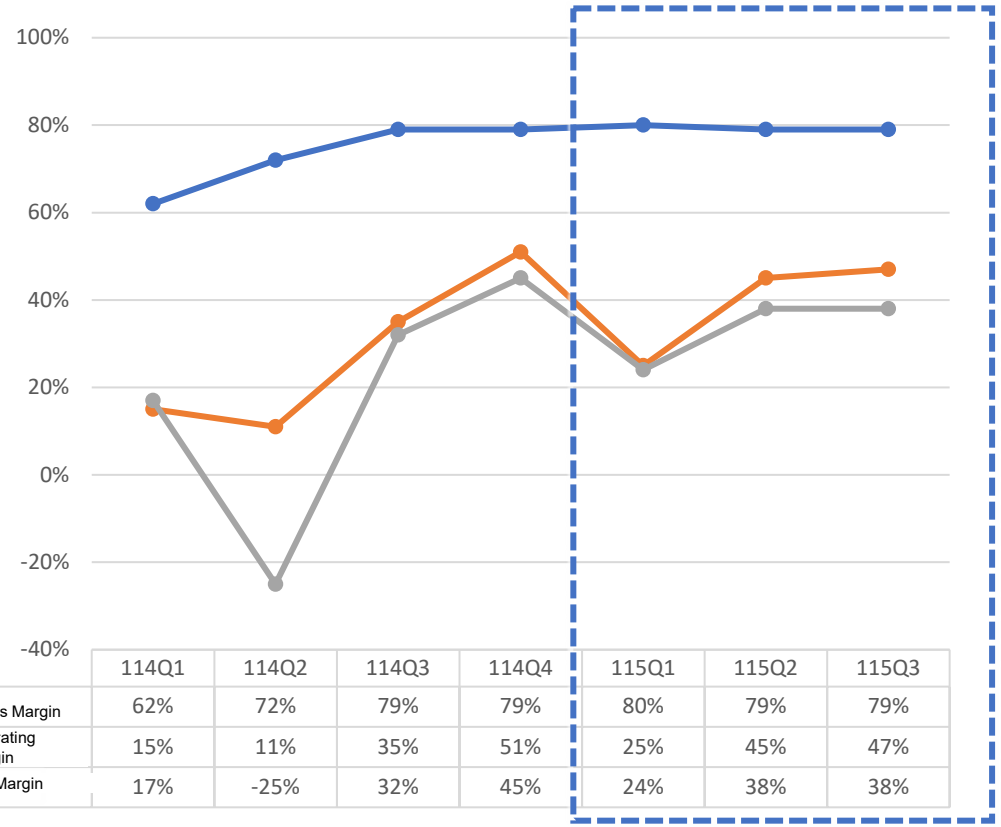
Operating Performance

Unit: NT$ in thousands



	114Q1	114Q2	114Q3	114Q4	115Q1	115Q2	115Q3
Operating Revenue	100,286	64,555	157,023	394,369	152,278	359,185	442,825
Net Profit after Tax	16,863	(15,866)	49,749	176,925	37,306	135,258	166,683



	114Q1	114Q2	114Q3	114Q4	115Q1	115Q2	115Q3
Gross Margin	62%	72%	79%	79%	80%	79%	79%
Operating Margin	15%	11%	35%	51%	25%	45%	47%
Net Margin	17%	-25%	32%	45%	24%	38%	38%

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Production Facilities



Zhubei Plant: 27 employees

1. Leased facility; building area: 1,323 m²
2. Probe assembly contract manufacturing and repair services. Equipment, personnel, and facility all ready



Zhongshan Plant: 58 employees

1. Company-owned property. Land area: 5,660 m²
2. Building area: 12,502 m²
3. Equipment assembly line + Automated probe card repair line +TGV-ICP (installed in line with customer demand; annual capacity planned: 1,680,000 PCS)



Xing'an Plant 1: 145 employees

1. Company-owned property; building area: 3,945 m²
2. Equipment assembly line + Cu pillar modules (annual capacity: 10,000,000PCS)+TGV-ICP (annual capacity planned: 120,000 PCS)

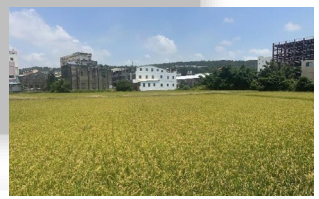
Xing'an Plant 2: Scheduled for completion by the end of 2Q27

1. Planned building area: 3,641 m²
2. TGV-ICP (annual capacity planned: 300,000 PCS)



Yi He Section: Land acquisition approved by the Board on November 10, 2026

1. Land area: 8,598 m²
2. Ownership transfer pending; under planning



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Outlook: Three Core Pillars for Operational Growth

Semiconductor MEMS Probe Card Automation Equipment

- Driven by stronger growth in end-market demand, shipments of Dual-arm Probe Assembly Machines are expected to increase significantly.
- Automated probe card repair equipment is completing validation and shipment in phases, driving a new wave of growth in 2027.
- A new generation of advanced probe card equipment is under development and expected to contribute to revenue in 2027.

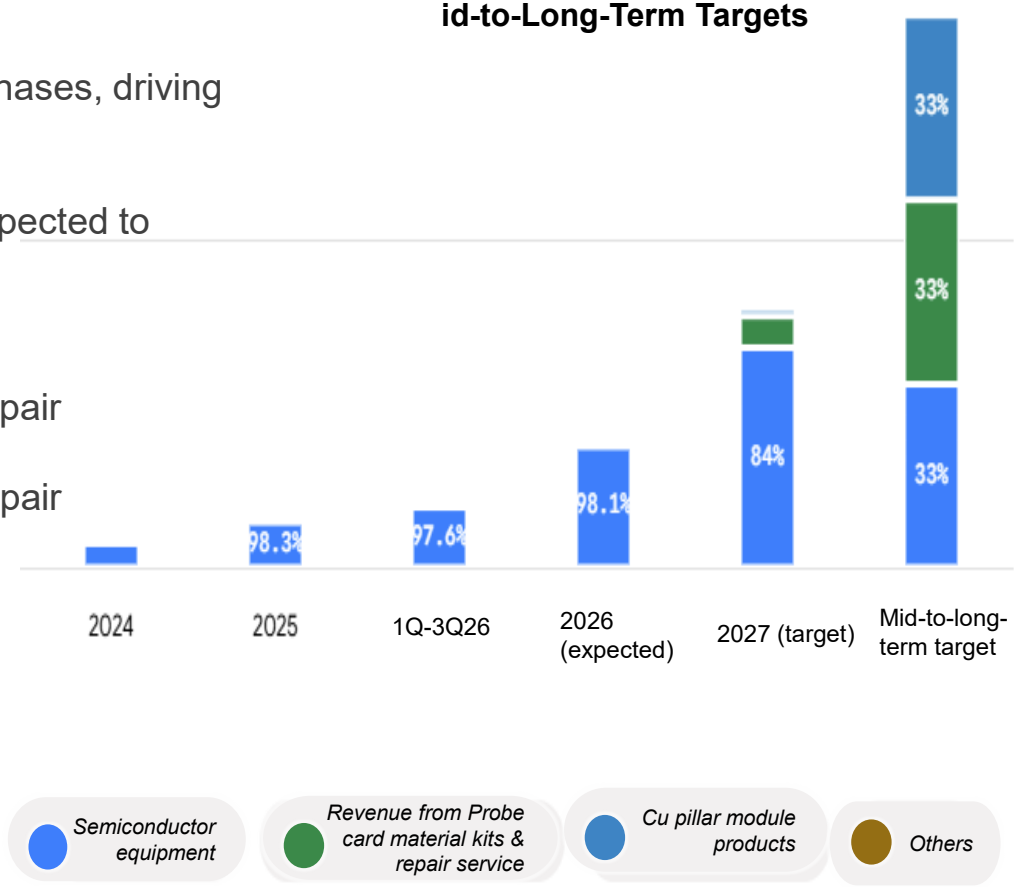
Probe Card Material Kits and Repair Service

- New IC probe card projects are gradually adopting MEMS probes, with ongoing repair services to follow.
- Expanding automated repair line capacity to provide faster, more efficient repair services and significantly reduce lead time.

Cu Pillar Module & TGV

- Innovative copper pillar solutions targeting power modules and TGV-based CoWoS packaging markets.
- Cu-pillar modules are expected to enter mass production in late 2026, serving applications such as antenna-in-package (AiP), power modules, and wearable earbud communication modules.
- Targeting mass production of TGV-ICP glass substrate products by late 2028 for high-speed transmission chip packaging.

Revenue Mix by Period and Mid-to-Long-Term Targets



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