

Announcement of Phison Electronics' May 2026 Revenue Results

Phison Electronics (8299TT), a leading provider of NAND controllers and NAND storage solutions, today (June 4, 2026) announced its operating results for May 2026. Consolidated revenue reached NT\$22.828 billion, representing 13% month-over-month (MoM) growth and 300% year-over-year (YoY) growth, setting a new all-time monthly revenue record. Cumulative revenue for the first five months of 2026 reached NT\$84.002 billion, up 229% YoY, also marking a record high for the same period in the Company's history.

PHISON 8299TT	Sales Revenue	Growth Rate	Remark
May 2026	22.828 (NT\$bn)	13% MoM 300% YoY	Record monthly high
Jan. to May 2026	84.002 (NT\$bn)	229% YoY	Record-high for the same period

K.S. Pua, CEO of Phison Electronics, stated, "The AI industry is gradually transitioning from model training to large-scale AI inference and Agentic AI deployment. Whether in Enterprise AI, Sovereign AI, AI agents, AI PCs, or other edge AI devices, AI applications continue to generate enormous volumes of data that require long-term storage and management. This further validates the industry trend that 'AI Inference is becoming data/storage centric.' As AI inference adoption accelerates, demand for NAND storage remains exceptionally strong, with no signs of slowing. Meanwhile, NAND supply remains relatively constrained as manufacturers continue to take a cautious approach toward capacity expansion, resulting in a persistently tight supply-demand environment."

K.S. Pua further explained, "As the AI ecosystem continues to expand, enterprise SSDs have evolved from traditional storage devices into critical components of AI infrastructure. From AI training, AI inference, Retrieval-Augmented Generation (RAG), and Agentic AI to hyperscale data centers and Sovereign AI deployments, demand for high-capacity, high-performance, and high-endurance enterprise SSDs continues to grow. Over the past several years, Phison has actively invested in its Pascari enterprise SSD portfolio, AI Data Platform, aiDAPTIV solutions, and related AI infrastructure offerings. These strategic investments have enabled Phison to capitalize on the next wave of AI-driven growth while increasing the contribution of high-value AI-related products to the Company's overall revenue and profitability."

In closing, K.S. Pua addressed, "In the edge AI market, the iGPU + aiDAPTIV platform developed in collaboration with Intel is steadily gaining market acceptance. By transforming NAND Flash into an extended memory resource for AI workloads, aiDAPTIV effectively

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overcomes traditional DRAM capacity limitations, enabling AI PCs and edge devices to run larger Mixture-of-Experts (MoE) models and Agentic AI applications. Multiple PC brands and server partners have already introduced products based on Intel platforms integrated with aiDAPTIV technology. Looking ahead, Phison will continue deepening its collaboration with CPU and GPU partners, as well as global AI ecosystem partners, to accelerate AI adoption and further execute its long-term strategy of transforming from a storage technology leader into an AI Storage Infrastructure and Edge AI Compute Platform Provider.”

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[PHISON's Quick Facts]

- Over 25 years experiences in NAND controller IC design and module integration.
- Over 4,500 employees globally, and more than 70% are engineers
- More than 2,000 NAND-related patents globally.
- Target long-term revenue of NT\$100 billion through the 5+5 growth strategy
- The global market share of SSD controllers exceeds 20%
- The global market share of automotive-grade controllers exceeds 40%
- Phison, along with NAND makers such as KIOXIA, Micron, SanDisk, Samsung, SK Hynix, and others, are long-term partners.
- Over 70% of Phison's revenue contribution comes from "non-consumer" NAND storage applications, including servers, automotive systems, embedded systems, industrial applications, gaming consoles, and generative AI, allowing Phison to maintain relatively stable revenue and profitability despite fluctuations in the NAND industry.
- Phison's mastery of the entire NAND industry ecosystem, including its relationships with upstream NAND makers, supply chain partners for NAND controllers and storage modules, and downstream NAND storage application customers, represents invaluable and irreplaceable value that Phison brings to its global clients and partners. It is also a key advantage that enables Phison to stand firm in the NAND industry.

[About PHISON]

Phison Electronics Corp. (TPEX:8299) is a global leader in NAND Flash controller IC and storage solutions. We provide a variety of services from controller design, system integration, IP licensing to total turnkey solutions, covering applications across SSD (PCIe/SATA/PATA), eMMC, UFS, SD and USB interfaces, reaching out to consumer, industrial and enterprise markets. As an active member of industry associations, Phison is on the Board of Directors for SDA, ONFI, UFSA and a contributor for JEDEC, PCI-SIG, MIPI, NVMe and IEEE-SA.

To know more about Phison, please visit [Phison Website](#) or [Phison Q&A](#) for details.

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[Forward-looking Statements]

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