PHISON

Announcement of Phison Electronics' June 2026 Revenue Results

Phison Electronics (8299 TT), a leading provider of NAND controller ICs and NAND storage solutions, today (July 9, 2026) announced its operating results for June 2026. Consolidated revenue reached NT$24.853 billion, up 9% month-over-month (MoM) and more than 300% year-over-year (YoY), setting a new all-time monthly revenue record. Cumulative revenue for the first six months of 2026 reached NT$108.855 billion, representing more than 240% YoY growth and also setting a record high for the same period in the Company's history. This also marks the first time Phison's cumulative consolidated revenue has exceeded NT$100 billion.

PHISON 8299TT	Sales Revenue	Growth Rate	Remark
June 2026	24.853 (NT$bn)	9% MoM 301% YoY	Record-high monthly revenue
2Q 2026	67.888 (NT$bn)	66% QoQ 280% YoY	Record-high quarterly revenue
Jan. to June 2026	108.855 (NT$bn)	243% YoY	Record-high revenue for the same period

K.S. Pua, CEO of Phison Electronics, stated, "As AI infrastructure continues to expand and generative AI rapidly transitions from model training to large-scale AI inference, global demand for NAND storage remains exceptionally strong. Market supply remains tight, with no clear signs of easing. We continue to see solid order momentum from cloud service providers (CSPs) and AI-related customers, with visibility for certain projects already extending into the first half of 2027. This further reinforces our conviction that the explosive growth of AI-generated data will continue to drive long-term demand for storage, while high-performance, highly reliable enterprise storage infrastructure will remain a critical foundation for the AI ecosystem."

K.S. Pua further explained, "At the same time, Phison continues to strengthen its presence in high-value markets through technology innovation and long-term design-in strategies. In June, our mobile controller shipments increased 47% YoY, demonstrating continued market share gains despite an overall decline in global smartphone shipments. Meanwhile, revenue from our PCIe SSD Boot Drive products surged 5,600% YoY, reflecting robust demand from general-purpose servers, AI servers, and AI networking applications. In contrast, the price-driven retail storage market is no longer a strategic focus for Phison, and we expect retail-related revenue to decline to below 5% of total revenue over time. Supported by the rapid expansion of AI infrastructure, enterprise SSDs and other high-value AI storage solutions are expected to contribute an increasing share of revenue and remain key drivers of Phison's future growth."

Phison Announcement
July 8th 2026

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[PHISON's Quick Facts]

- Over 25 years experiences in NAND controller IC design and module integration.
- Over 5000 employees globally, and more than 70% are engineers
- Nearly 2,000 memory-related patents globally.
- Target long-term revenue of over NT$100 billion through the 5+5 growth strategy
- The global market share of SSD controller exceeds 20%
- The global market share of automotive-grade controller exceeds 40%
- Phison maintains long-term strategic partnerships with leading NAND manufacturers, including KIOXIA, Micron, SanDisk, Samsung, SK hynix, and YMTC.
- More than 80% of Phison's revenue contribution comes from "high-value" NAND storage application markets, including servers, automotive systems, embedded systems, industrial applications, gaming consoles, and generative AI. This enables Phison to maintain relatively stable revenue and profitability despite fluctuations across the NAND industry cycle.
- Phison's deep understanding and integration across the entire NAND ecosystem — including strong bilateral partnerships with upstream NAND manufacturers and close engagement with downstream NAND storage application customers — represent the irreplaceable value Phison brings to global customers and partners, and serve as a key competitive advantage that allows Phison to remain resilient and influential within the NAND industry.

[About PHISON]

Phison Electronics Corp. (TPEX:8299) is a global leading provider of NAND flash controller ICs and storage solutions. As the industry evolves, Phison has transformed from a traditional controller IC design company into an integrated platform service provider combining AI computing and storage technologies, focusing on high-value and customized markets. Leveraging its expertise in firmware algorithms, controller IC design, and system integration, Phison provides one-stop services ranging from IP licensing and chip design to system architecture and turnkey solutions. Its technologies are widely adopted across data centers, AI computing, enterprise storage, industrial PCs, and embedded systems. Through close collaboration with global NAND manufacturers and ecosystem partners, Phison helps customers accelerate design-in processes and deliver high-performance, reliable, and differentiated storage and AI solutions. To know more about Phison, please visit Phison Website or Phison Q&A for details.

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