

002475

2023-001

	<input checked="" type="checkbox"/> _____
	2023 2 24 14:00-18:30
	313
	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>Lidya</p> <p>Jun</p> </div> <div style="text-align: center;"> <p>Gary</p> <p>Felix</p> </div> <div style="text-align: center;"> <p>Echo</p> </div> <div style="text-align: right;"> <p>Stella Ricky</p> <p>Ying Sky</p> </div> </div>
	<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>1</p> <p>2</p> <p>3</p> </div> <div style="text-align: center;"> <p>MR</p> <p>AR</p> </div> </div>

	TAG	VR
4		
5		IO
6		CPE
7		
8		
		+
1		
2		
1		
2		
3		



SBTi1.5

2050

145

2022 1

50

ISO14064

2022 1

SBTi 1.5

2022

2021

2023

IOE

2022

10%



	<p>2008</p> <p>100</p> <p>100</p>	<p>Tier1</p> <p>SuK Tier1</p> <p>BCS 2022</p> <p>2018</p> <p>Tier1</p> <p>AR-HUD</p>	<p>USB</p> <p>2012</p> <p>2013</p> <p>Tier1</p> <p>2018</p> <p>2022</p> <p>2022</p>
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**Ricky**

1

2

3

1

2

3

24

18

12





	USB			
	3	2030		5
		3%		10%
			<b>Ying</b>	
	AR			
			NXP	
			8155	
	2023	64%		
			W HUD AR HUD	AR HUD
				AR HUD



2030

1

L2

L2+  
L2+ADAS

70

110 120

AI

L2+

2

soc

100 500Tops

1





3

Nano Filter

4

**Jun**

AI 5G

2022

1

X86

2

3



Q2

To-B

Q3

Q4

3%

OEM



Q9 VR/AR

Q10

Q11

ROIC

Capex

Q12

Q13

Wei Wei

Karen Huang Andre Lin

Angus Lin

Edwin Li

Cherry Ma



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Alpine  
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J.P.Morgan Kadensa Ann Chung Keywise Lazard  
Fisher Xi LMR Francis Millennium Cher Chen Henry Wang Mirae  
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