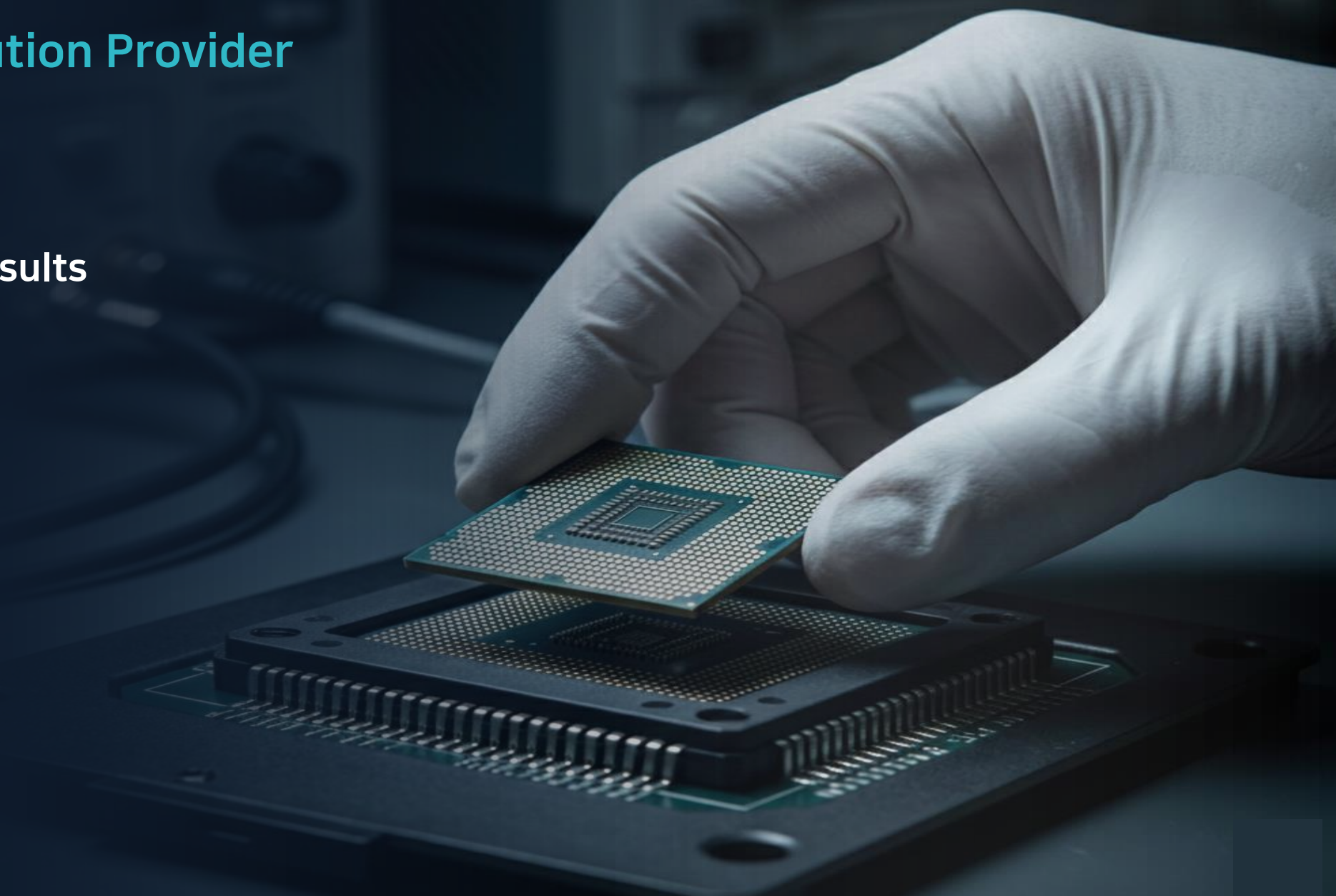


AI Total Test Solution Provider

ISC

2025 Q4 Earnings Results



Contents

1. Financial Results

- FY 2025 Performance Review
- Q4 2025 Financial Performance Review
- 2026 Strategic Outlook and Goals

2. Appendix

- Key Financial Highlights

Disclaimer

This document is for informational purposes only and contains unaudited financial data, which is subject to change following the external audit.

All information regarding the company's financial performance included in this document has been prepared on a consolidated basis in accordance with Korean International Financial Reporting Standards (K-IFRS).

Furthermore, this document contains "forward-looking statements," such as expectations, projections, plans, and outlooks regarding the future.

Please note that actual results may differ materially from these forward-looking statements due to inherent risks and uncertainties.

2025 Highlights

Record-High Annual Results

AI Semiconductor Test Sockets : The Engine of Growth

- AI revenue share: 68%; Revenue: KRW 149.4 billion (FY25 cumulative)
- Diversifying client base for AI accelerators and ASICs
- Maximizing synergies with captive clients via integrated turnkey tester & socket solutions

Revenue

KRW 220.2B

+26% YoY

Operating Income

KRW 60.1B

+34% YoY

Profitability Bolstered by High-Value -Added Product Mix

- Expanding sales of high-value-added non-memory test sockets for mass production (Increased share of SLT test¹⁾)
- Boosting margins via O/I²⁾-driven process optimization and cost savings
- Phasing out low-margin product portfolios

1) SLT (System Level Test): Testing conducted under actual end-device operating conditions.

2) O/I (Operation Improvement): Enhancing operational efficiency.

2025 Performance



- AI revenue share: 68% (Exceeded FY 2025 target of 60%)

- Expanding market share within existing VIP clients
- Maximizing synergies via integrated turnkey tester & socket solutions
- Scaling high-end memory¹⁾ sales

- Increasing share of non-memory SLT (System Level Test)
- Cost savings through O/I (Operation Improvement)
- Reducing the proportion of low-margin products

- Completed Phase 2 modernization of manufacturing processes in Vietnam

- Building a global compliance framework: Attained ISO 37001 (Anti-Bribery Management System) and ISO 37301 (Compliance Management System) certifications
- Establishing ESG/SHE²⁾ unit reporting directly to the CEO

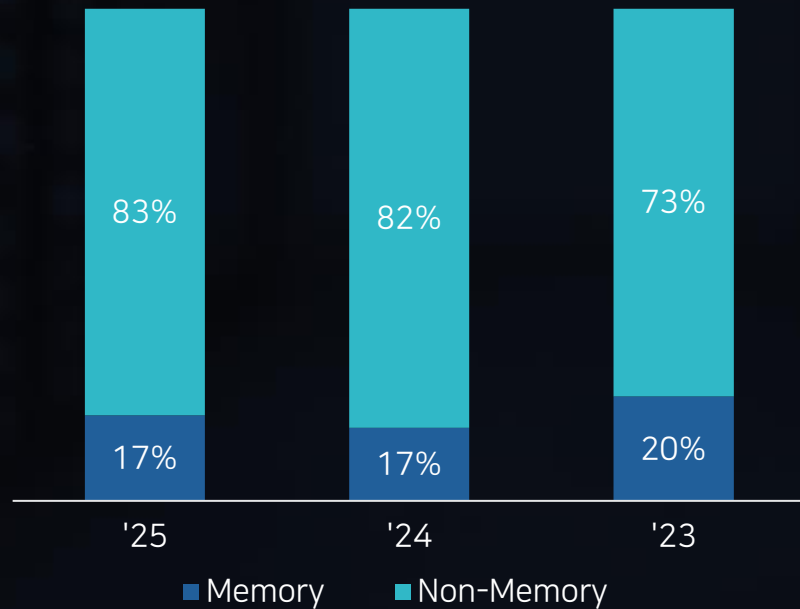
1) High-end memory: Including HBM, DDR5, LPDDR5X, GDDR7, and SOCAMM.

2) SHE: Safety, Health, and Environment; core management priorities for sustainable operations and workplace safety.

2025 Performance

- Revenue Mix (Memory vs. Non-Memory)

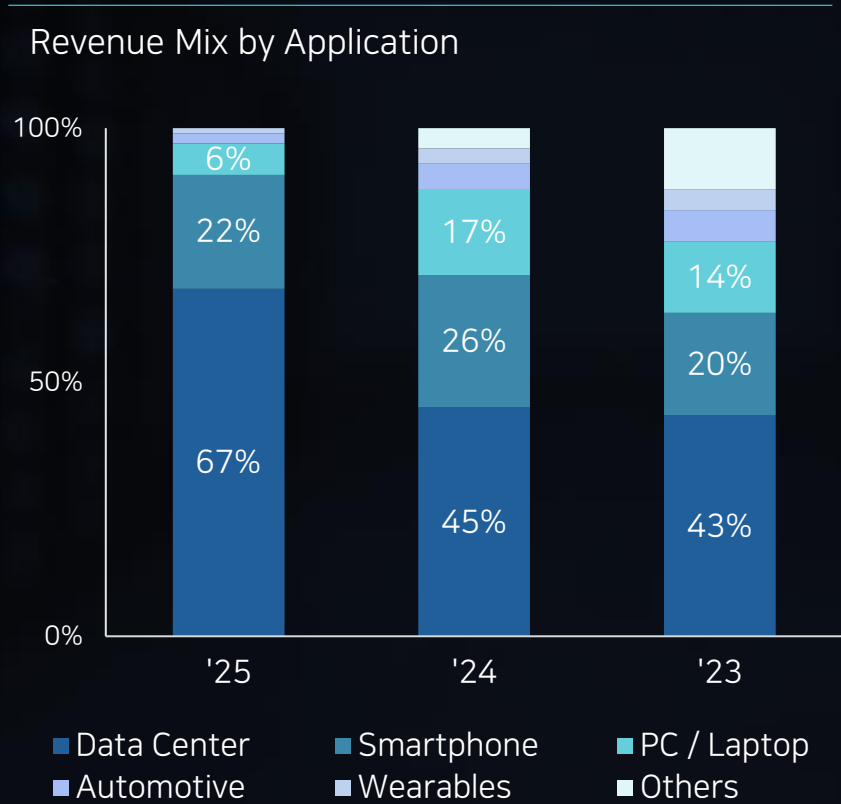
Revenue Mix by Segment



Unit: KRW 100M, %	2025	2024	2023	YoY	CAGR (2023-2025)
Total	2,202	1,745	1,402	26%	25%
Memory	398	256	276	55%	20%
Non-Memory	1,794	1,470	1,024	22%	32%
Others	10	19	101	△47%	△69%

2025 Performance

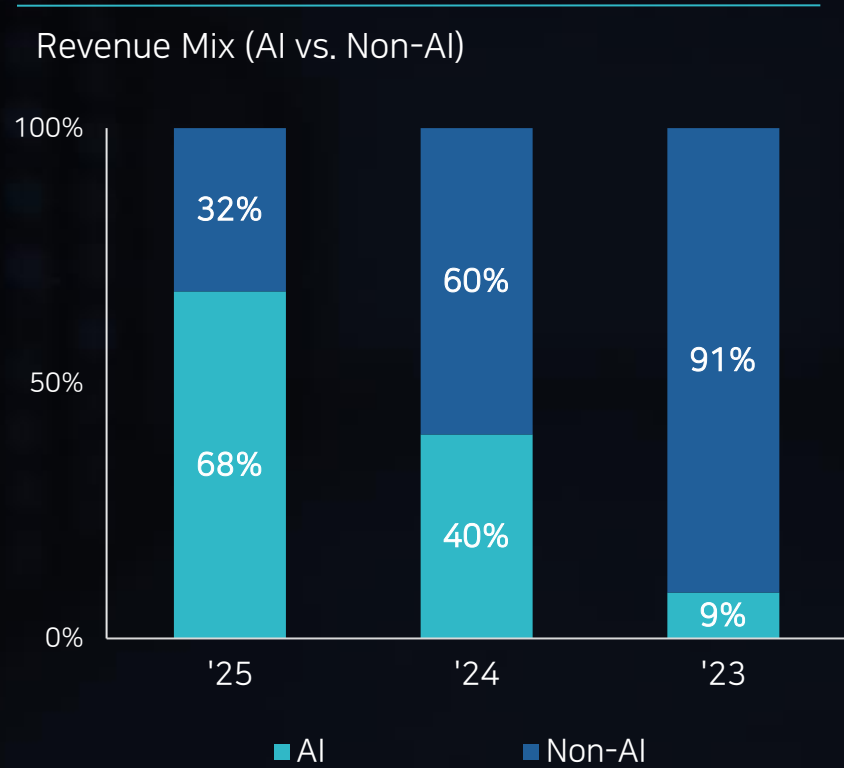
- Revenue Mix by Application



Unit: KRW 100M, %	2025	2024	2023	YoY	CAGR (2023-2025)
Total	2,202	1,745	1,401	26%	25%
Data Center	1,484	788	606	88%	56%
Smartphone	490	460	286	7%	31%
PC / Laptop	137	292	192	△53%	△16%
Automotive	51	82	90	△38%	△25%
Wearables	32	56	56	△43%	△24%
LSI	-	47	70	-	△33%
Others	8	20	101	△60%	△72%

2025 Performance

- AI Revenue Share



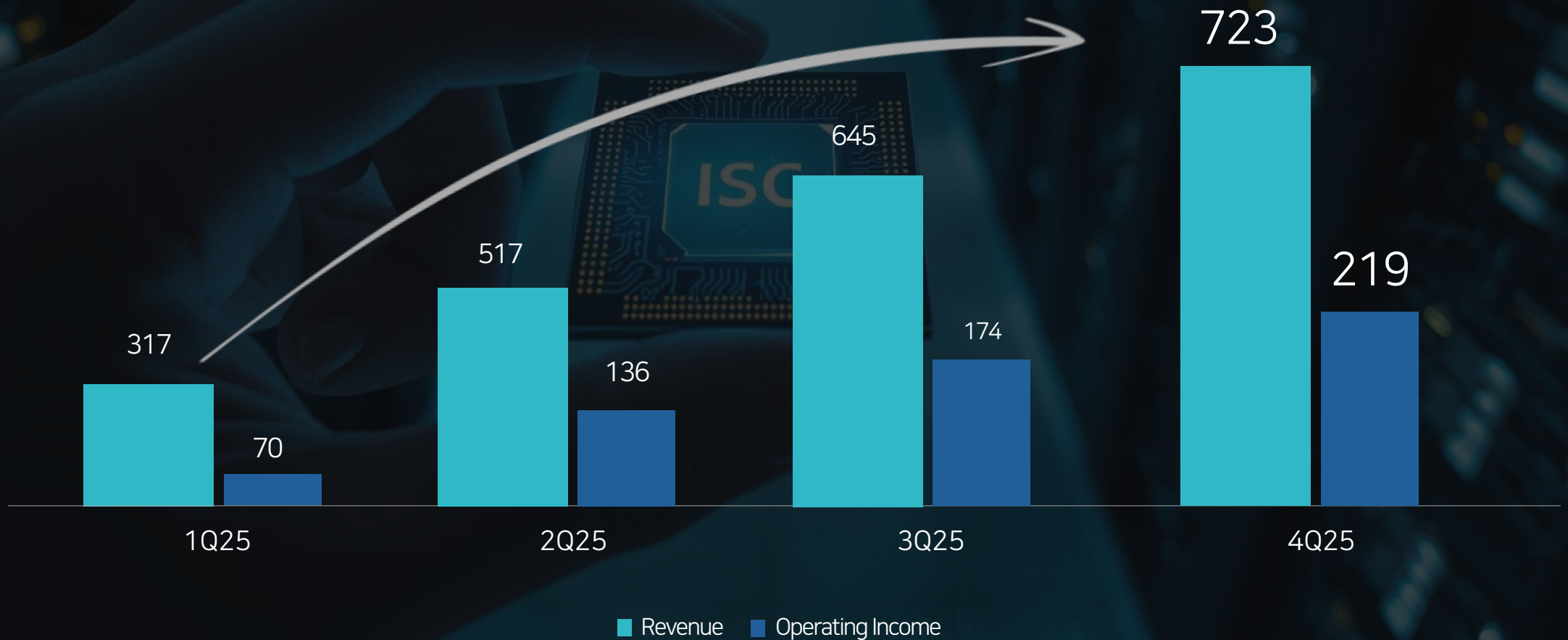
Unit: KRW 100M, %

	2025	2024	2023	YoY	CAGR (2023-2025)
Total	2,202	1,745	1,401	26%	25%
AI	1,494	694	128	115%	242%
Non-AI	708	1,051	1,273	△33%	△25%

Q4 2025 Highlights

Record-High Quarterly Performance for Two Consecutive Quarters

Unit: KRW 100M

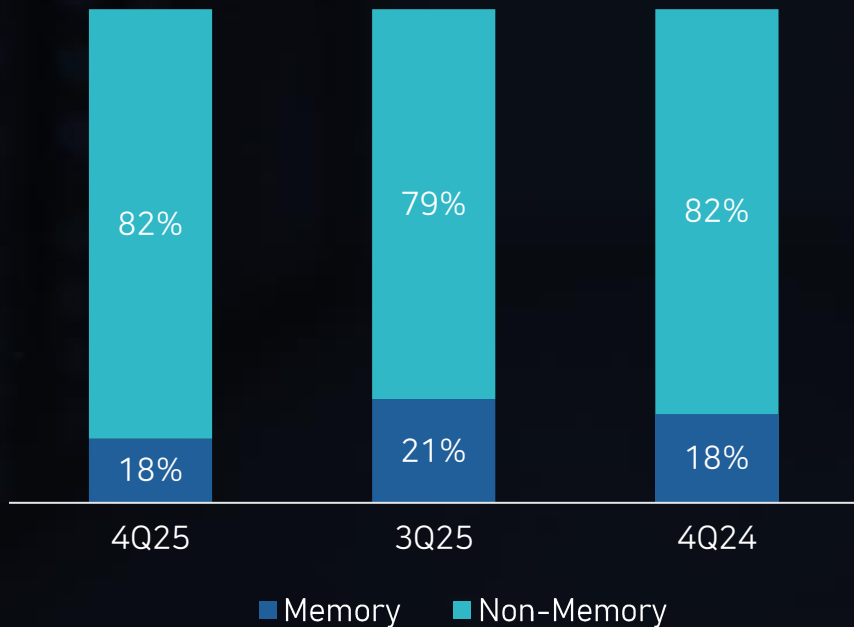


Q4 2025 Performance

- Revenue Mix (Memory vs. Non-Memory)

Expanded non-memory SLT¹⁾ revenue share to over 50%.
 High-end memory²⁾-driven orders kept memory revenue in the KRW 10B range since Q3.

Revenue Mix (Memory vs. Non-Memory)



Unit: KRW 100M, %	4Q25	3Q25	4Q24	QoQ	YoY
Total	723	645	393	12%	84%
Memory	129	133	51	△3%	153%
Non-Memory	592	510	337	16%	76%
Others	2	2	5	-	△60%

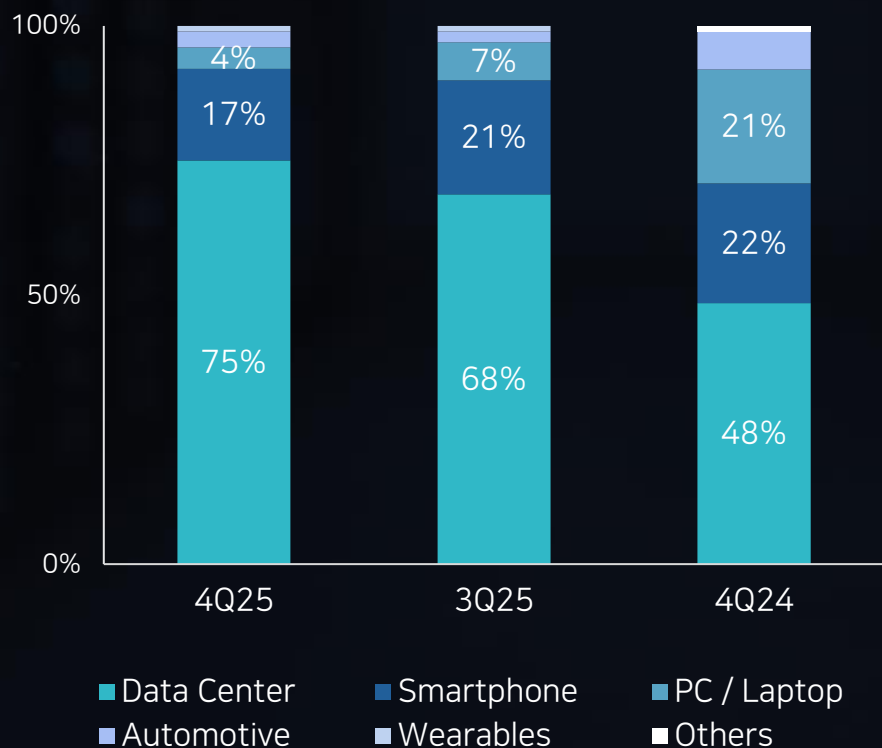
1) SLT (System Level Test): Testing conducted under actual system-level operational environments.
 2) High-end memory: Including HBM, DDR5, LPDDR5X, GDDR7, and SOCAMM.

Q4 2025 Performance

- Revenue Mix by Application

Quarterly data center revenue exceeded KRW 50B, fueled by market share expansion with global clients

Revenue Mix by Application



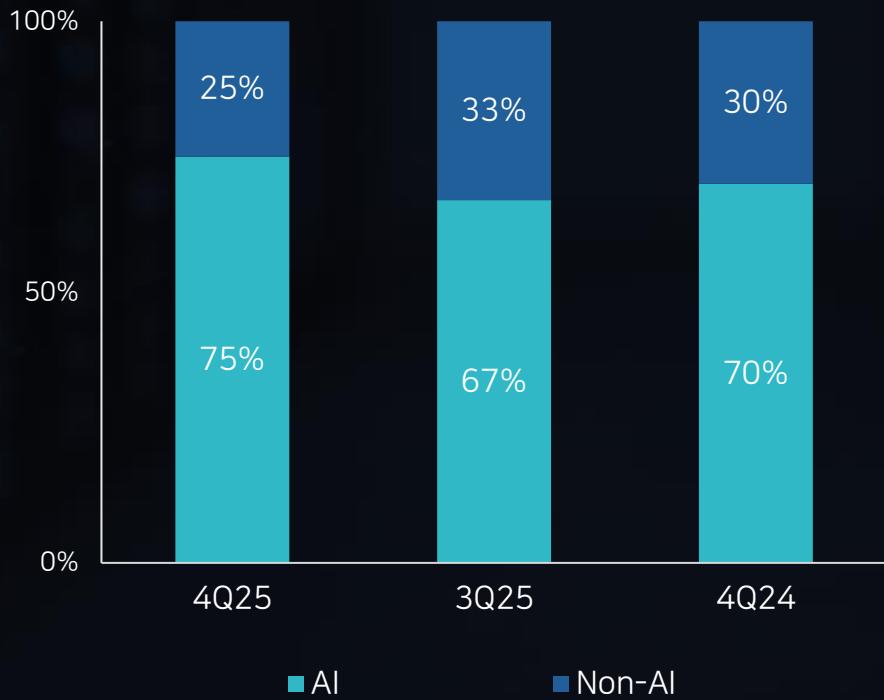
Unit: KRW 100M, %	4Q25	3Q25	4Q24	QoQ	YoY
Total	723	645	393	12%	84%
Data Center	544	440	280	24%	94%
Smartphone	120	135	63	△11%	90%
PC / Laptop	30	45	35	△33%	△14%
Automotive	19	15	10	27%	90%
Wearables	10	8	-	25%	-
Others	-	2	5	-	-

Q4 2025 Performance

- AI Revenue Share

Record-high quarterly AI revenue achieved through AI accelerator (GPU) and ASIC client diversification

Revenue Mix (AI vs. Non-AI)



Unit: KRW 100M, %	4Q25	3Q25	4Q24	QoQ	YoY
Total	723	645	393	12%	84%
AI	540	430	275	26%	96%
Non-AI	183	215	118	△15%	55%

2026 Strategic Goals

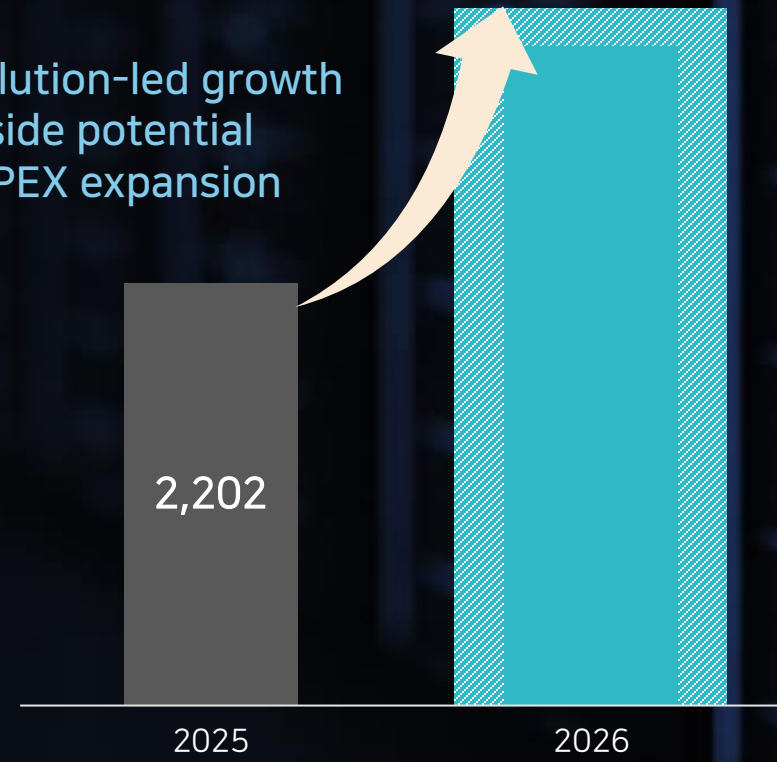
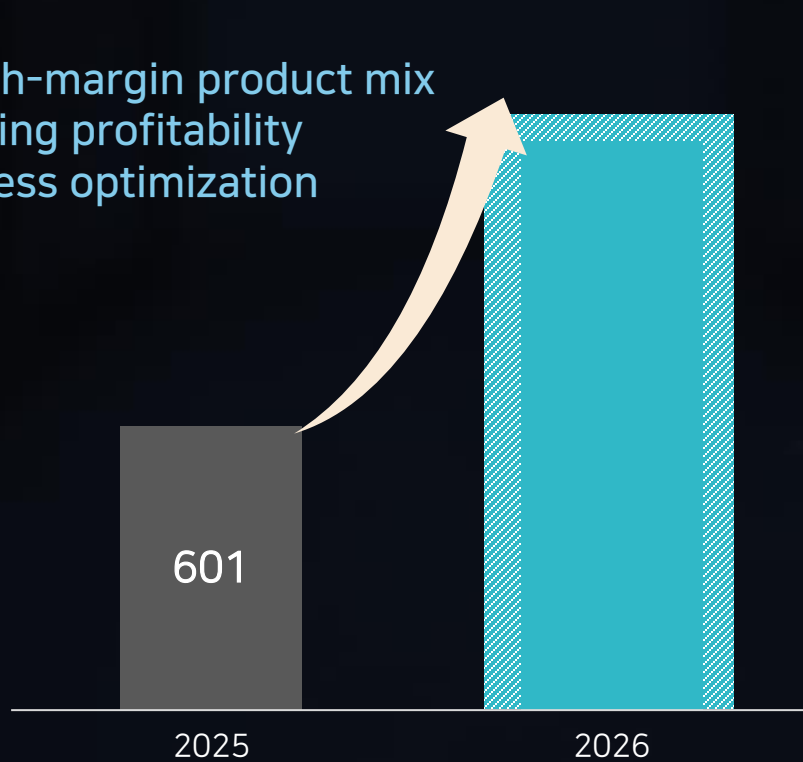
20%+ YoY growth as baseline; preemptive CAPEX deployment following AI/HBM test order surge

[Operating Income]

[Revenue]

Expanding high-margin product mix
Enhancing profitability
via process optimization

AI/HBM test solution-led growth
Future upside potential
through CAPEX expansion



2026 Momentum Drive ON



- AI revenue share target: 70%+
- Supplying HBM test solutions to the Big 3 memory manufacturers
- Increasing market share in AI accelerator and ASIC mass production test sockets
- Diversifying ASIC client portfolio

- Expanding high-end memory test socket market share (75% in '25 → 85% in '26)
- VIP client base expansion (8 in '25 → 12 in '26)
- Maximizing synergies in the equipment and materials business (HBM Test Solutions, Burn-in Testers, HBM Chemicals, SOCAMM)

- Increasing market share of test sockets for HBF / CPO¹⁾ R&D
- Supplying test sockets for autonomous and automotive semiconductor mass production
- Supplying new TPU and GPU mass production test sockets

- Planned large-scale CAPEX investment
 - Vietnam
 - Phase 1 fab expansion (Target: 2Q26)
 - Phase 2 fab construction (Target: 3Q26)
 - Domestic production sites integration & process optimization via manufacturing AX (Target: 4Q26)

- Strengthening board independence
 - Appointing an independent director as Board Chairman
 - Increasing the proportion of independent directors (2 in '25 → 3 in '26)
- Enhancing shareholder returns
 - 2026 dividend per share: KRW 850 (vs. KRW 810 in '25)

1) CPO (Co-Packaged Optics): Integrated optical packaging.

Q&A



Appendix



Consolidated Income Summary

(Unit: KRW 100M)	2025	2024	2023	YoY	CAGR (‘23~’25)
Revenue	2,202	1,745	1,402	26%	25%
Gross Profit	977	744	552	31%	33%
Operating Income	601	448	107	34%	137%
EBITDA	701	546	194	28%	90%
Net Income	563	549	136	3%	103%
Earnings Per Share (Unit: KRW)	2,656	2,589	642	3%	103%

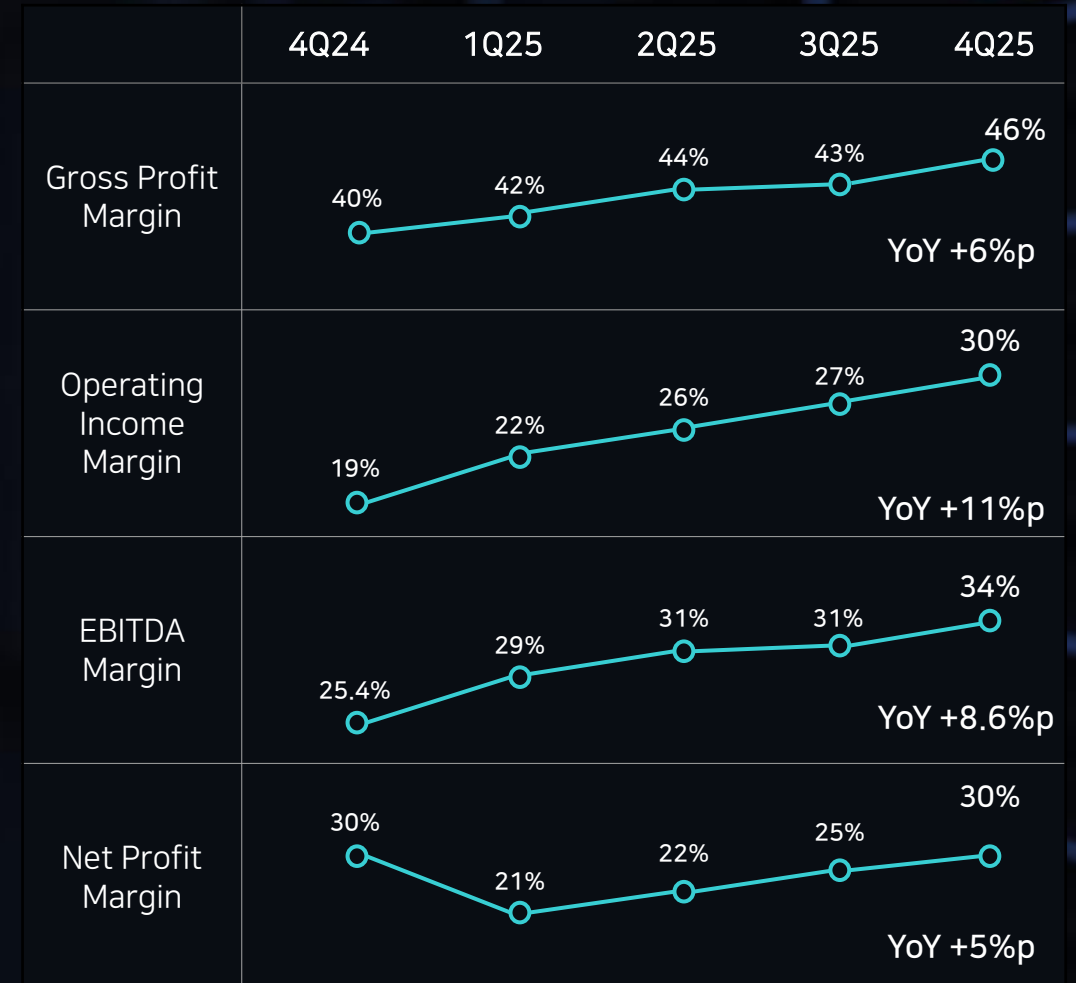
Quarterly Earnings Summary

(Unit: KRW 100M)	4Q25	3Q25	4Q24	QoQ	YoY
Revenue	723	645	393	12%	84%
Gross Profit	333	276	159	17%	159%
Operating Income	219	174	75	26%	192%
EBITDA	247	198	99	25%	149%
Net Income	217	162	119	34%	82%
Earnings Per Share (Unit: KRW)	1,023	765	566	34%	81%

Consolidated Financial Statements

(Unit: KRW 100M)	2025	2024	2023
Assets			
Current Assets	4,467	4,051	3,618
Non-Current Assets	1,757	1,778	1,800
Total Assets	6,224	5,829	5,418
Liabilities			
Current Liabilities	829	522	583
Non-Current Liabilities	23	75	101
Total Liabilities	852	597	684
Shareholders' Equity			
Share Capital	106	106	106
Retained Earnings	2,608	2,220	1,733
Total Equity	5,373	5,231	4,735

Profitability Metrics



The background is a dark blue, almost black, surface with a grid of glowing, semi-transparent circuit board components and microchips. The components are arranged in a regular pattern, with some appearing more prominent than others. The lighting is soft and focused, creating a sense of depth and highlighting the intricate details of the circuitry.

End of Document