

Company presentation

➤ March 2017



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Agenda

- 1 H1'17 highlights
- 2 H1'17 financials
- 3 Business review: promising prospects in Electronics
- 4 Outlook
- 5 Appendix

Agenda

1 H1'17 highlights

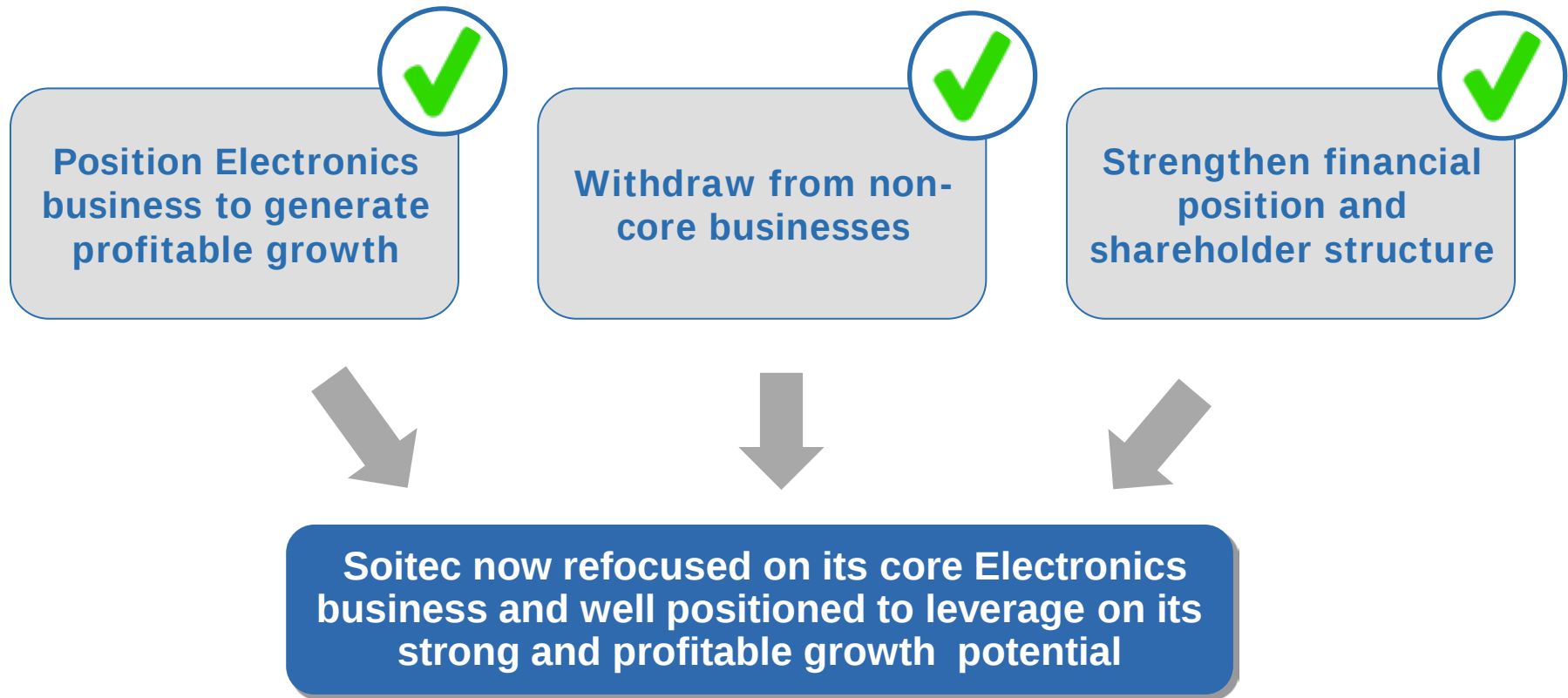
2 H1'17 financials

3 Business review: promising prospects in Electronics

4 Outlook

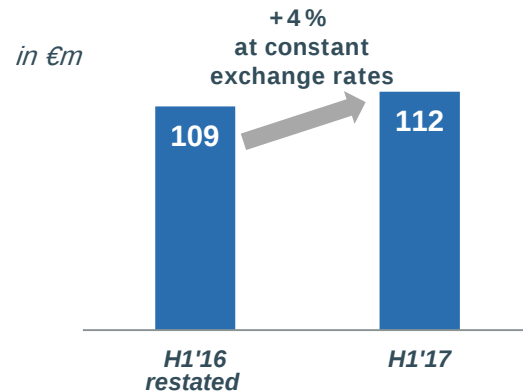
5 Appendix

Successful implementation of the strategy initiated in early 2015

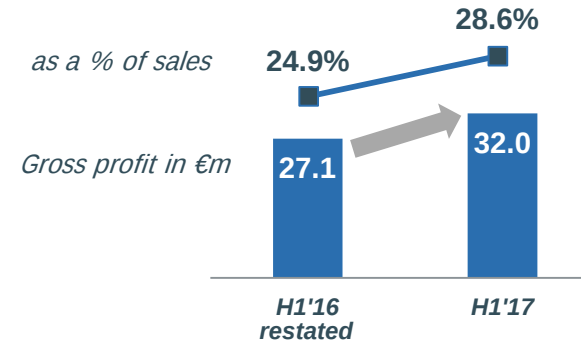


Further substantial improvement in operating profitability in H1'17

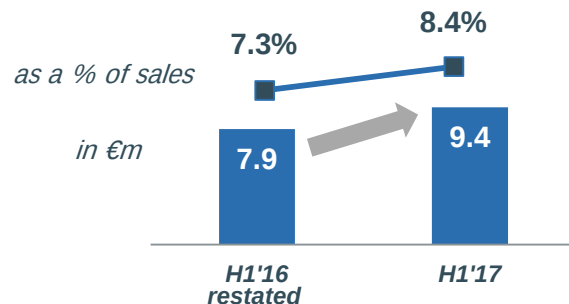
Sales growth (Electronics)



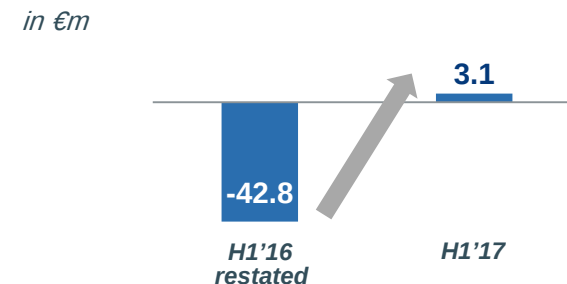
Significant increase in gross margin



Increase in current operating income

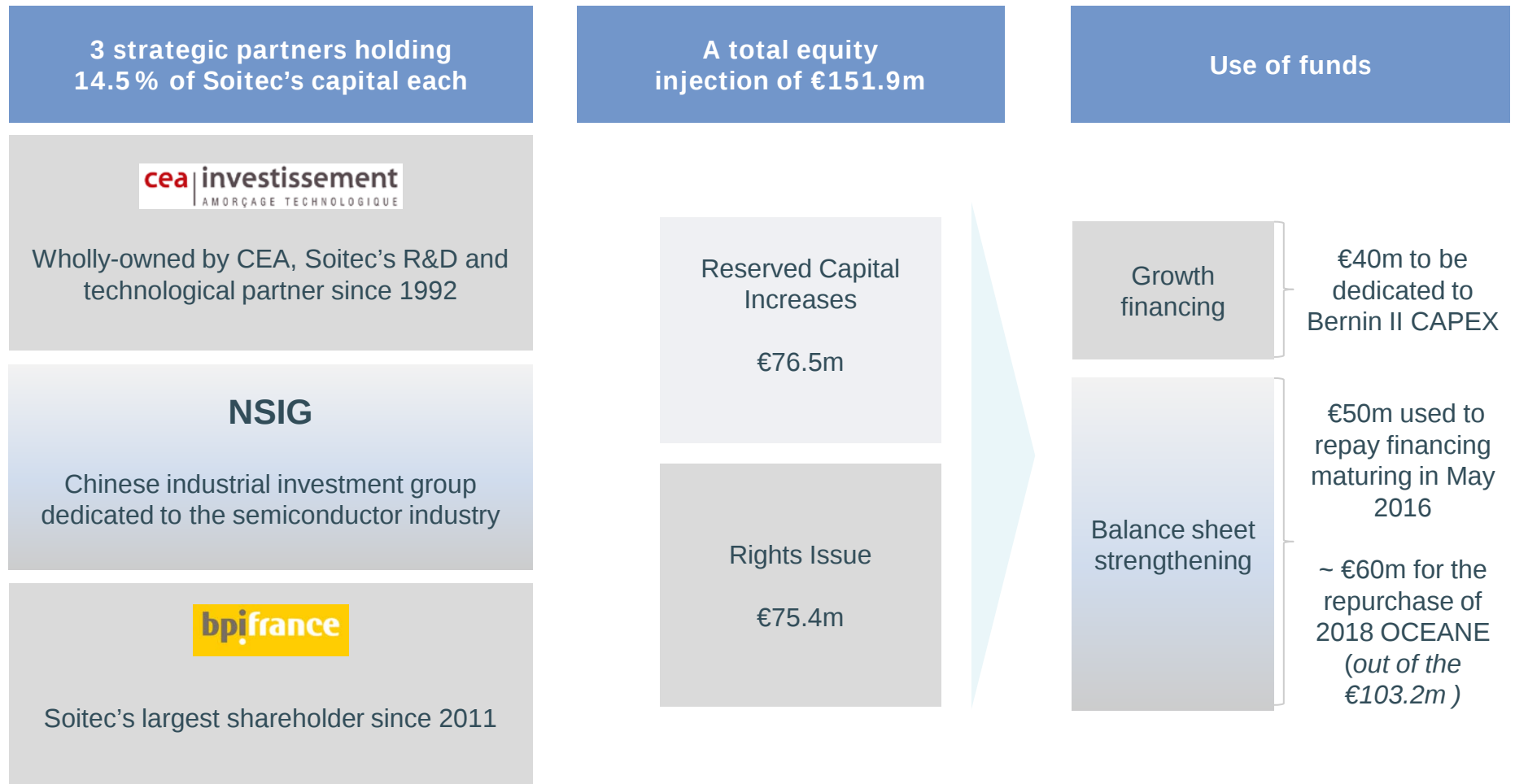


Positive net result



The income and expenses related to discontinued operations are directly reported as "Net result from discontinued operations". Down to the line "Net result after tax from continuing operations", the Group consolidated P&L account now exclusively and fully reflects the Electronics activities as well as corporate expenses. The H1'16 financial statements have been restated to ensure comparability with the H1'17 financial statements.

Key transaction completed in Q1'17 to strengthen balance sheet and support future growth



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2 **H1'17 financials**

3 Business review: promising prospects in Electronics

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H1'17: revenue breakdown

<i>In million euros</i>	Q1'17 April – June	Q2'17 July – Sept.	H1'17	Change ¹ vs H1'16	Change ¹ at constant FX
200mm wafer sales	42.7	44.7	87.4	+4%	+5%
300mm wafer sales	11.4	10.7	22.0	-2%	-1%
Royalties and IP revenues	1.4	1.3	2.7	+8%	+9%
Total sales	55.4	56.7	112.1	+3%	+4%

› 200mm wafer sales up 5% excluding currency impact

- › Bernin I production site operating at full capacity leading to volume increase vs H1'16
- › Sales driven by sustained demand for radio frequency and power electronics applications in the mobile and automotive markets

› 300mm wafer sales down 1% excluding currency impact

- › Slightly lower revenues primarily reflect the ongoing and anticipated decline of the PD-SOI product line
- › Bernin II production site remains vastly under-utilized pending the pick-up in RF-300mm demand and the capex to support the future mass-market production of FD-SOI

› Royalties and IP revenues up 9% excluding currency impact

Following the withdrawal from the Lighting and Equipment businesses at the end of FY'16 and the decision to report their related income and expenses as discontinued operations in FY'16 accounts, H1'16 consolidated revenues have been restated to only reflect sales from the Electronics segment and ensure comparability with H1'17.

Group consolidated P&L (1/2)

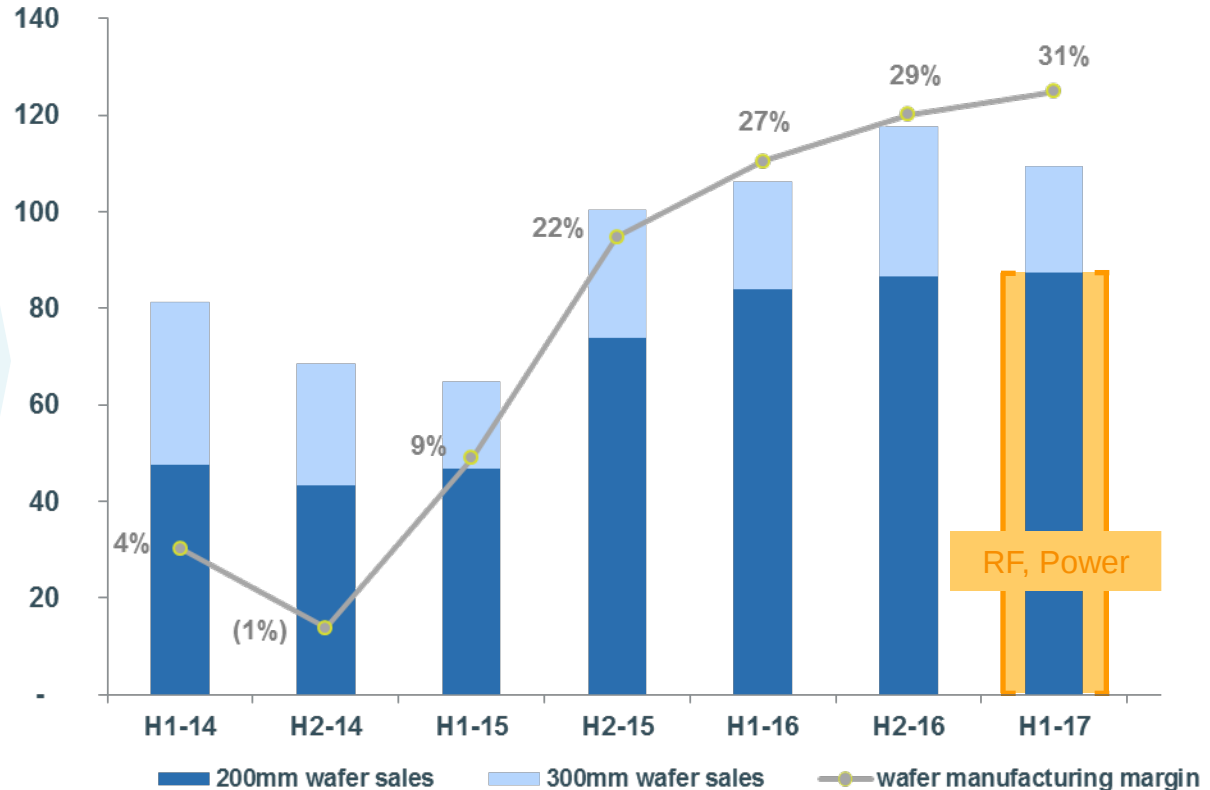
In million euros

	H1'17	H1'16 restated	Change
Sales	112.1	108.9	+3%
Gross profit <i>As a % of sales</i>	32.0 28.6%	27.1 24.9%	+18%
See detail on slide 12 Research and development expenses <i>As a % of sales</i>	(9.7) 8.6%	(8.0) 7.4%	+20%
See detail on slide 12 Selling, general and administrative expenses <i>As a % of sales</i>	(12.9) 11.5%	(11.1) 10.2%	+16%
Current operating income <i>As a % of sales</i>	9.4 8.4%	7.9 7.3%	+19%
EBITDA (Continuing operations) <i>As a % of sales</i>	18.5 16.5%	15.0 13.8%	+23%

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Electronics activity back to profitable growth, with significant operating leverage ahead

- 1 Significant revenue recovery over the last quarters
- 2 First benefits from the cost saving plan
- 3 Wafer manufacturing benefiting from operating leverage
- 4 Secured 200mm backlog offering strong visibility over the next 12 months



H1'17 operating expenses

R&D expenses (in million euros)	H1'17	H1'16 restated
Gross R&D expenses	(21.3)	(19.8)
Prototype sales and other	2.2	2.3
Subsidies and income tax credit	9.4	9.5
Total net R&D expenses	(9.7)	(8.0)
<i>As a % of sales</i>	<i>(8.6%)</i>	<i>(7.4%)</i>

SG&A expenses (in million euros)	H1'17	H1'16 restated
Sales & marketing expenses	(3.4)	(2.6)
General & administrative expenses	(9.5)	(8.5)
Total SG&A expenses	(12.9)	(11.1)
<i>As a % of sales</i>	<i>(11.5%)</i>	<i>(10.2%)</i>

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Group consolidated P&L (2/2)

In million euros

	H1'17	H1'16 restated
Current operating income	9.4	7.9
Other operating income and expenses	(1.2)	(5.3)
Operating income	8.2	2.6
See detail on slide 14 Net financial income/(expense)	(5.9)	(12.7)
Income tax	(0.2)	(0.3)
Net profit / (loss) from continuing operations	2.1	(10.4)
See detail on slide 15 Net profit / (loss) loss from discontinued operations	1.1	(32.4)
Net profit / (loss) (Group share)	3.1	(42.8)

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H1'17 net financial result

In million euros

	H1'17	H1'16 restated
Interest expense on OCEANE 2018	(2.4)	(5.0)
One-off charge related to the repurchase of OCEANE 2018	(2.2)	-
Interest expense on loans and credit lines	(0.4)	(1.1)
Interest expense on leasing	(0.7)	(0.5)
Non recurring financial expense	(0.6)	-
Other financial income / (expense)	(0.5)	(0.8)
Change in valuation of financial assets	0.6	(5.0)
Net financial incomes / (charges)	(6.2)	(12.4)
Net foreign exchange result	0.3	(0.2)
Net financial result	(5.9)	(12.7)

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Net profit from discontinued operations

Directly reported at the bottom of consolidated P&L

In million euros

	H1'17	H1'16 restated
Sales	0.4	11.9
Expenses	(0.6)	(16.6)
Current operating income/(loss)	(0.2)	(4.6)
Other operating income and expenses	(1.8)	(0.3)
Operating income/(loss)	(1.9)	(4.9)
Net financial income/(expense)	2.9	(27.1)
Income tax	-	-
Loss from equity affiliates	-	(0.4)
Net profit / (loss) from discontinued operations	1.1	(32.4)

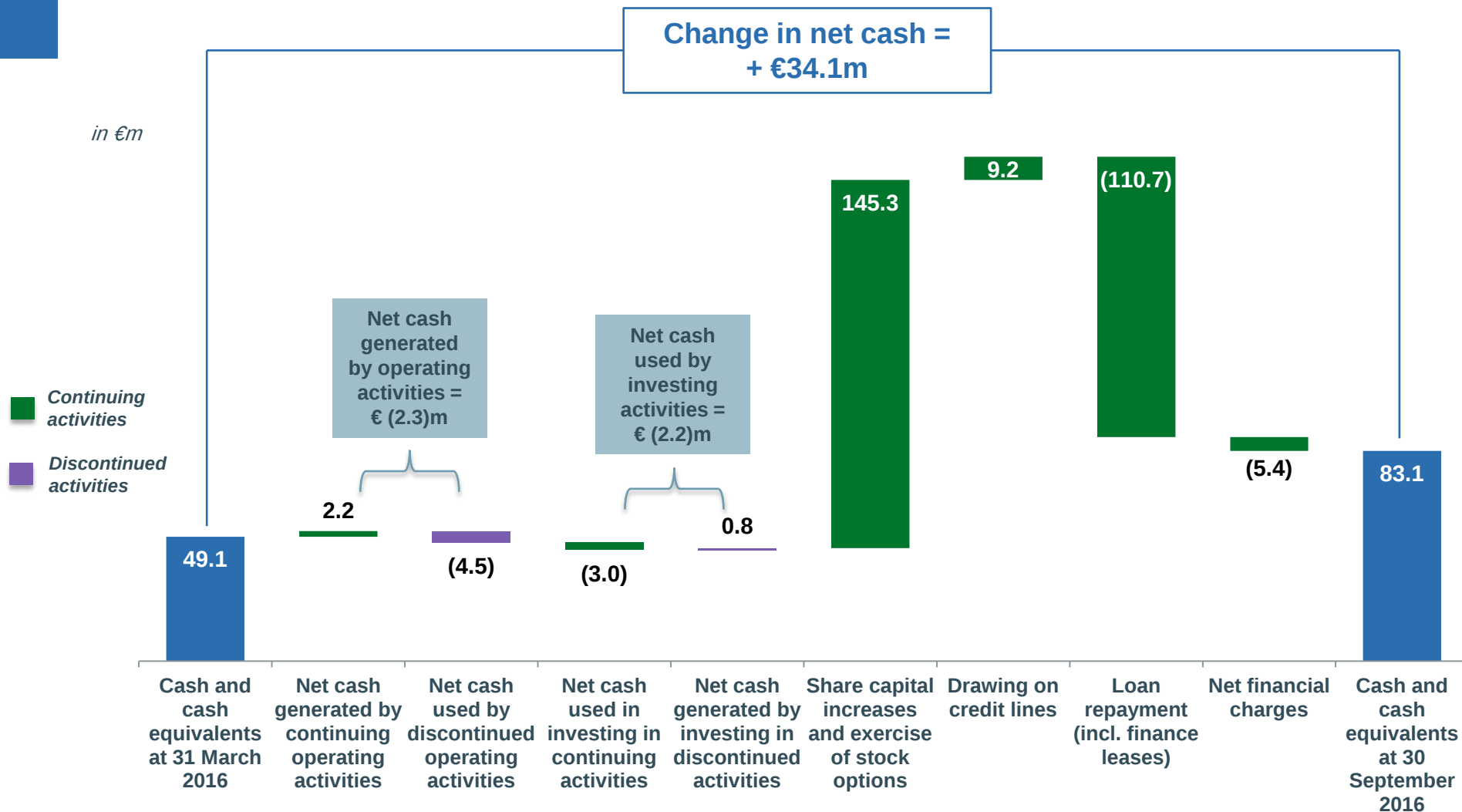
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H1'17 net cash generated by operating activities

In million euros

	H1'17	H1'16 restated
Net profit / (loss)	3.1	(42.8)
<i>of which continuing activities</i>	2.1	(10.4)
<i>of which discontinued activities</i>	1.0	(32.4)
Non cash items	10.5	27.9
<i>of which continuing activities</i>	16.4	25.4
<i>of which discontinued activities</i>	(5.9)	2.5
EBITDA	13.6	(14.9)
<i>of which continuing activities</i>	18.5	15.0
<i>of which discontinued activities</i>	(4.8)	(29.9)
Inventories	(3.1)	(6.4)
Trade receivables	6.9	1.9
Other receivables	(1.1)	6.5
Trade payables	(14.2)	(9.8)
Other liabilities	(4.8)	4.1
Change in working capital related to discontinued operations	0.3	19.7
Change in working capital	(15.9)	16.0
<i>of which continuing activities</i>	(16.3)	(3.7)
Net cash generated by operating activities	(2.3)	1.1
<i>of which continuing activities</i>	2.2	11.3
<i>of which discontinued activities</i>	(4.5)	(10.2)

H1'17 cash generation

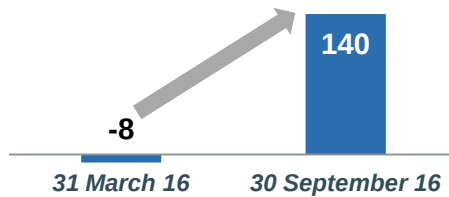


Net Impact of exchange rate fluctuations is negligible

Major strengthening of the balance sheet during H1'17

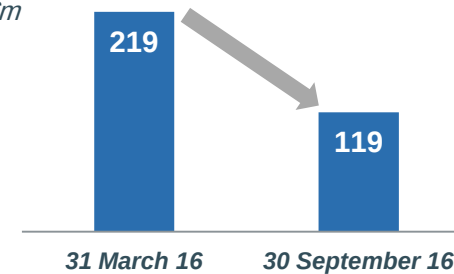
Shareholders' equity

in €m



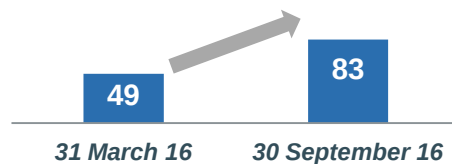
Gross debt

in €m



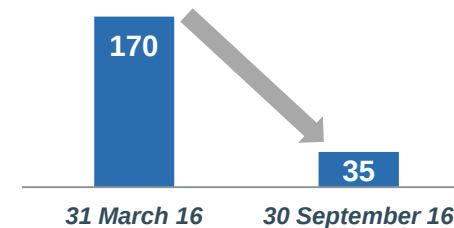
Cash and cash equivalents

in €m



Net debt

in €m



Simplified consolidated balance sheet

30th September 2016

In million euros

	30 th Sept 2016	31 st March 2016
Intangible assets	4.5	5.7
Tangible assets and other non current assets	148.4	154.2
Total non-current assets	152.9	159.9
Current assets	86.2	90.3
Cash and cash equivalents	83.1	49.1
Assets held for sale and discontinued	27.2	25.9
Total current assets	196.6	165.2
Total assets	349.5	325.1

In million euros

	30 th Sept 2016	31 st March 2016
Total equity	139.9	(7.9)
Long-term financial debt	101.9	160.0
Provisions and other non-current liabilities	16.3	14.1
Total non-current liabilities	118.2	174.1
Short-term financial debt	16.7	59.0
Current liabilities	62.0	83.4
Liabilities from discontinued operations	12.8	16.5
Total current liabilities	91.4	158.9
Total liabilities and equity	349.5	325.1

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Who we are and what we do

Engineered substrates at the heart of Electronics

Core Technologies

3,600 active patents

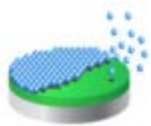
soitec Smart Cut™



soitec Smart Stacking™
layer-transfer technology



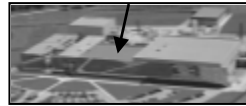
soitec Epitaxy expertise



Manufacturing

Current
production sites

Bernin I



200mm
capacity:
~800k wafers
per year

Bernin II



300mm
capacity:
~650k wafers
per year

Additional & flexible
production capacity

Simgui (China)



Extra flexible
capacity: 150k
wafers per
year (200mm)

Singapore



Extra flexible
capacity:
~1m wafers per
year (300mm)

Top Customers

Direct
customers



Key market
players



Soitec products and technologies portfolio

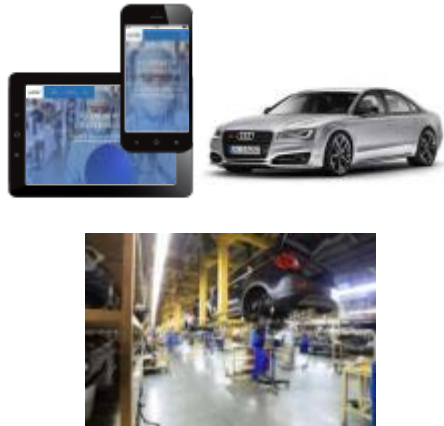
Well positioned to capture new market opportunities

2000-2010
PC, Gaming &
Automobile



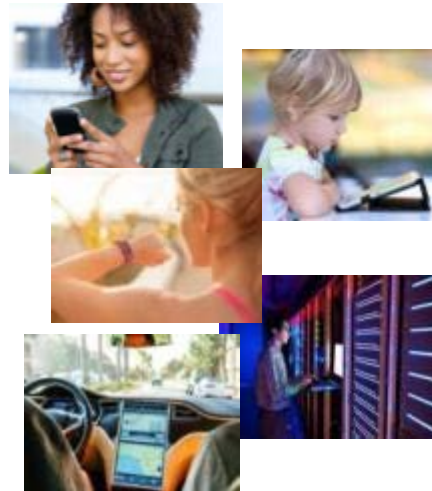
Main Soitec product: PD-SOI

SINCE 2010
Mobile, Automobile
& Industry



Main Soitec products: RF-SOI, Power-SOI

2017 +
Electronics for Everyday
Use

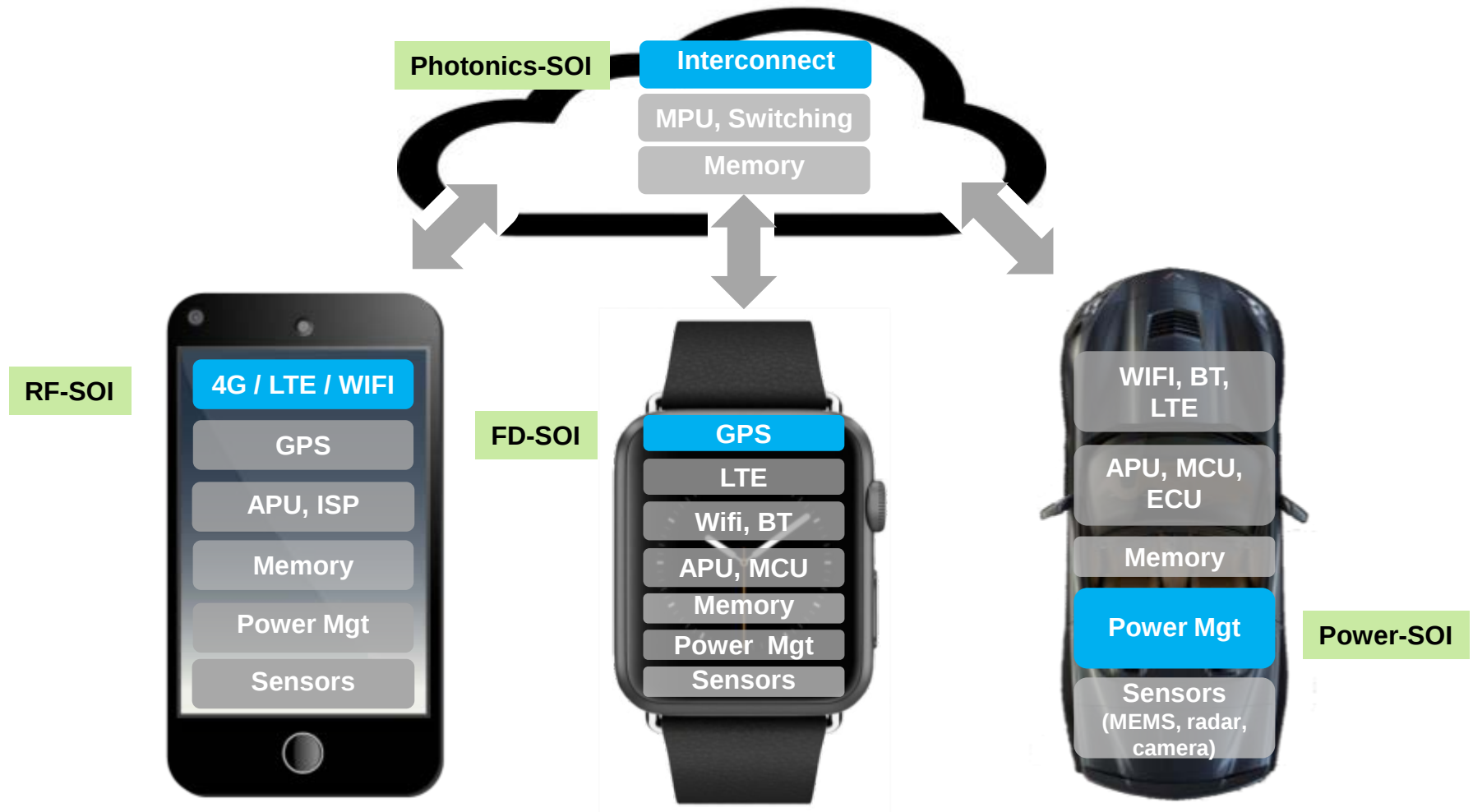


Main Soitec products: FD-SOI, RF-SOI, Power-SOI and other products to come

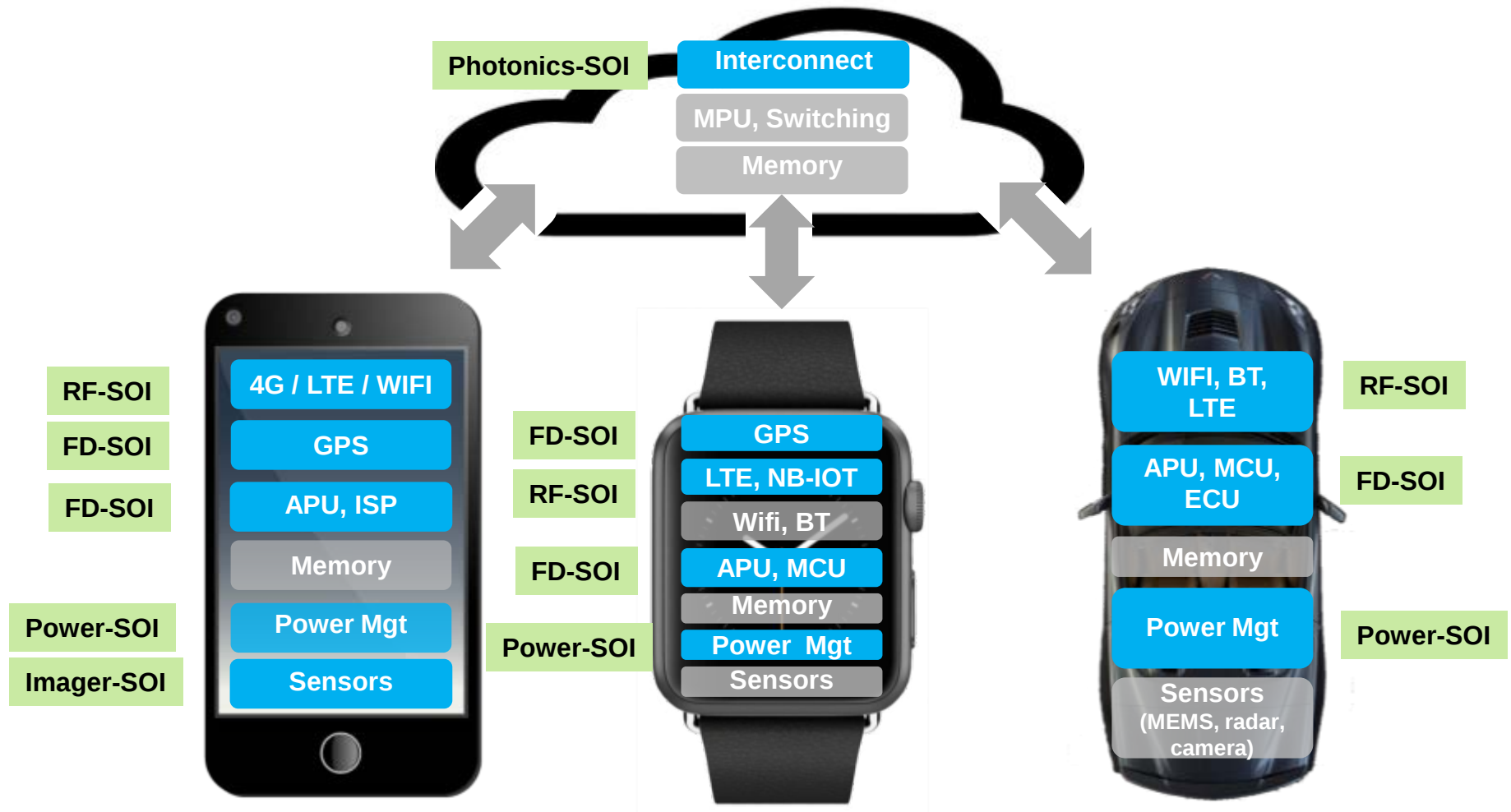
2020 +
5G World



Soitec footprint FY17



Soitec footprint FY22



RF-SOI solid market fundamentals

A fast-growing market thanks to smartphone increasing complexity

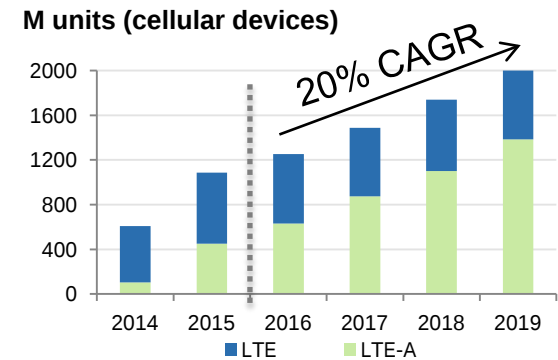
Increasing RF-SOI content

- 100% of smartphones use RF-SOI technology
- SOI content continues to grow within smartphones due to increased complexity: rising number of frequency bands and higher data-speed requirements



9 mm² ~18 mm² 25 mm² >27 mm²

LTE-A: market growth driver



RF-SOI market

Soitec estimated market by 2020

>2m wafers per year

Current addressable market in 2015

900k wafers per year

A green arrow points from the 2015 market size to the 2020 market size, indicating growth.

Soitec estimates / 200mm equivalent

Power-SOI for Automotive

Strong legacy business, growing SOI footprint in Auto

+10 years
of proven track
record in automotive
integrated circuits

NXP is a #1 Global Auto Semi supplier



Customers count **every single failure**, PPM/PPB is irrelevant

12 EXTERNAL LOG



~80mm²
of SOI average content
in every car produced
in 2015



6 billion
chips in automobiles based
on Soitec Power-SOI wafers

Power-SOI market

Soitec estimated
market by 2020
**>500K
wafers per
year**

Current
addressable
market in 2015
**350K wafers
per year**

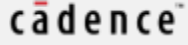
Soitec estimates / 200mm

FD-SOI ecosystem getting stronger

Further important milestones reached during last 6 months

A rapidly growing
FD-SOI ecosystem

Industrial readiness
and product launches

Research Technology & IP	Substrates	Foundries	Fabless & OEMs	Consumer Products
    	 & Licensees Tools & EDA    	   IP & Design Services       	        +50 fabless under development	  



GLOBALFOUNDRIES
22FDX industrial readiness
and roadmap extension
September 2016



SAMSUNG
28 FDS commercial
production
April 2016



SMARTWATCH
First FD-SOI based consumer
product - GPS chipset
August 2016



NXP
Multi-market i.MX 7/ i.MX 8
product family offering
(Auto, Consumer)
September 2016

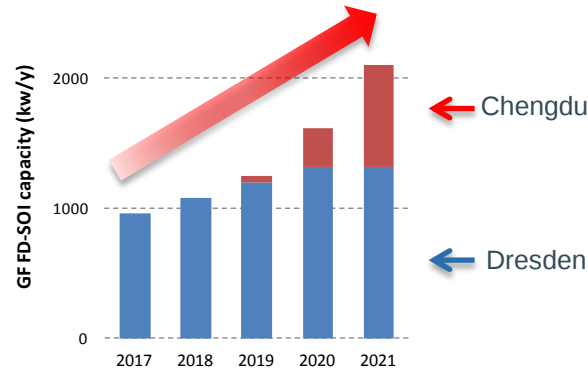
GlobalFoundries: traction from FD-SOI is increasing

Dresden: increasing FD capacity & focus on 12nm development



- › 22nm FD-SOI capacity increase in Dresden to meet demand for IoT, smartphone processors, and automotive
- › Overall capacity up by 40 percent reaching 1.3Mw by 2020
- › Strong focus on 12FDX technology development, with customer product tape-outs expected to begin in 2018.

Chengdu fab: a masterpiece to meet accelerating 22nm demand



Source: GlobalFoundries

- › Accelerating global customer demand for 22FDX requires additional capacity
- › GF and the Chinese municipality of Chengdu have formed a partnership to build a fab → capacity up to 800Mw/y
- › Volume production is expected to start in 2019
- › The announce was welcomed by Rockchip, Mediatek, and Qualcomm

Dream Chip: the first 22nm FD-SOI chip with outstanding features



- › First use of 22 nm chip based on FD-SOI technology targeted at automotive Tiers 1 in ADAS/Autonomous driving applications to meet needs of cost, high performance and power-optimized SoCs
- › Result of an extensive cooperation with ARM, Arteris, Cadence, and GF
- › Supports complex automotive object detection and processing (neural network vision workloads)

FD-SOI technology roadmap

GlobalFoundries: industry's first multi-node FD-SOI roadmap

- Integration for connected and interactive systems
- Unparalleled energy efficiency
 - Minimum energy point operation (<0.4V)
 - Enhanced body-biasing
 - Full Vt mixing
 - 50% lower power than 16/14nm FinFET
- Connectivity across wireless protocols
 - Superior RF/Analog: high $f_{T/fMAX}$
 - Planar devices with lower parasitics
 - Optimized for 1/f Noise and RTS
- Smart scaling: no triple- and quad-patterning
 - Full node shrink vs. 22FDX
 - 40% fewer masks than 10nm FinFET
 - Flexible layouts for analog designs

22FDX
TM

(2017)

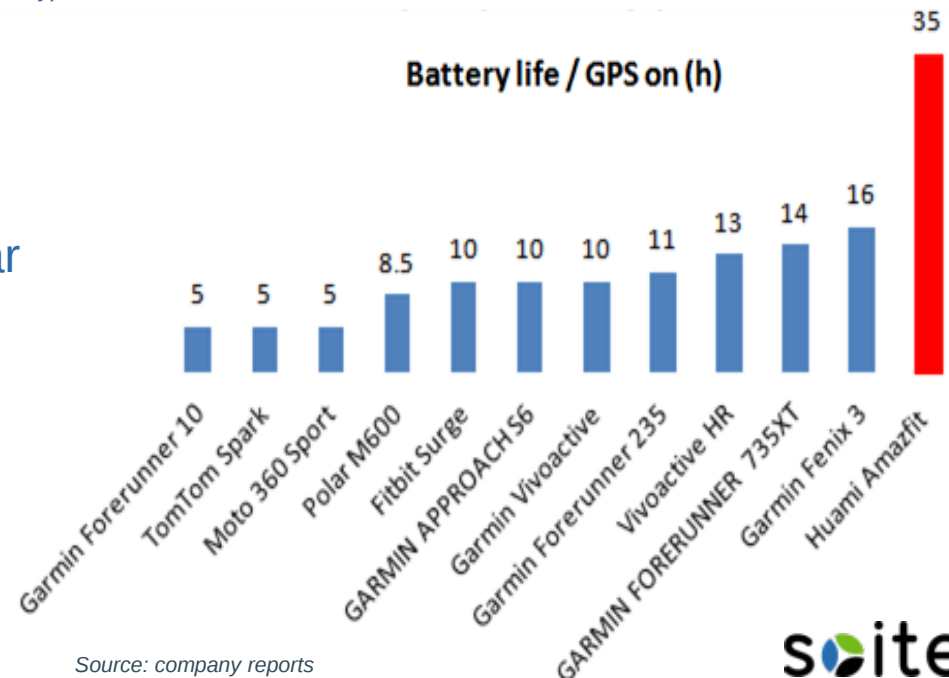
12FDXTM
(2019)

Source: GlobalFoundries

FD-SOI applications

First consumer electronic product launched in 2016

- Amazfit Watch launched in August in China by Huami (part-owned by Xiaomi)
- First **28nm FD-SOI** GPS sensor
- **5 days** of battery life (source: manufacturing company)
- **35 hours** of battery with the GPS mode turned ON
- **2X to 5X** more battery life than similar watches already on the market



FD-SOI

i.MX 7 & i.MX 8, FD-SOI based product family, now available in NXP offering



- › i.MX Platform using 28FDS Samsung process
- › Only technology allowing such a large range of applications on a single platform



Enabling power-efficient, secure IoT applications

i.MX 7 Series Applications Processors

The i.MX 7 series is a highly integrated multi-market applications processor designed to enable secure and portable applications within the Internet of Things.

TARGET APPLICATIONS

- › Building automation
- › Wearables
- › Point-of-sale
- › Enterprise scanners and printers
- › E-Readers
- › Smart home controls
- › Patient monitoring
- › IoT solutions



Transforming interactions in ways you've never imagined

i.MX 8 Family of Applications Processors

Built with advanced media processing, secure domain partitioning and innovative vision processing, the i.MX 8 applications processor family will revolutionize multiple display automotive applications, industrial systems, vision, HMI and single-board computers.

TARGET APPLICATIONS

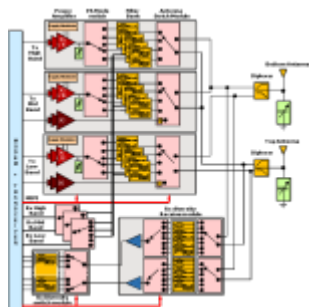
- › Automotive infotainment—instrument cluster, head unit, heads-up display (HUD), rear seat entertainment and full digital electronic cockpit (eCockpit)
- › Advanced industrial human machine interface (HMI) and control
- › Single-board computers
- › Home/Building

5G market opportunities

Unique range of RF engineered substrates

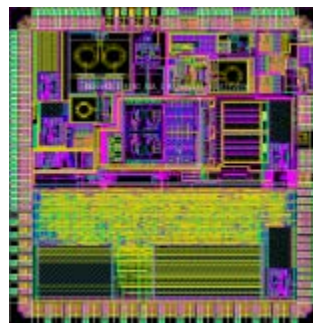
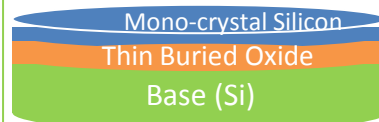
RF Front-End Module 4G

RF-SOI (and layer transfer)



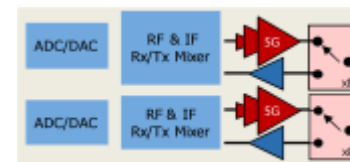
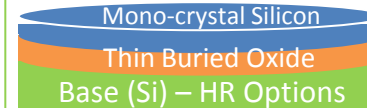
Transceivers & SoC - IoT

FD-SOI



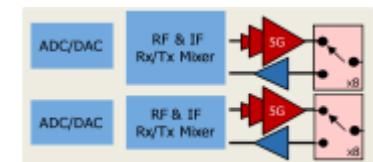
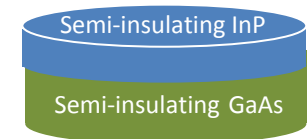
RF Front-End Module 5G

FD/PD-SOI



RF Front-End Module 5G

InPoGaAs



H1'17 Business trends

Robust demand for RF/Power, bottom reached in 300mm

› Communication & Power

- › Demand remains robust for RF-SOI products in Mobile applications and for Power-SOI products in Automotive
- › Customers successfully developing products based on 300mm wafers for RF – multiple foundries and their fabless customers are engaged – volume ramp-up is now expected in CY 2017

› Digital

- › As expected, activity for PD-SOI products steadily continues to contract
- › FD-SOI ecosystem continues to strengthen: as expected, first product launched in CY 2016 and further products to be launched in the coming months (Internet of Things, infrastructure, automotive)
- › Production of FD-SOI-based chips to serve tier-1 fabless customers has started in CY 2016 for 28nm and is expected in 2017 for 22nm

› Bernin 200mm wafer fab continues to run at full capacity

- › Demand is already strong for CY 2017
- › Simgui (Chinese foundry) achieved first customer qualifications for 200mm SOI wafers in October 2016

› Low-point reached in fiscal Q2'17 for the 300mm business

Agenda

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- 2 H1'17 financials
- 3 Business review: promising prospects in Electronics
- 4 Outlook**
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Outlook

FY'17 Guidance

- › FY'17 Electronics sales expected at low single digit growth at constant exchange rates
 - › Further growth in 200mm thanks to solid demand in RF-SOI and Power-SOI
 - › 300mm business is expected to start recovering from the low point reached in Q2'17 with new products offsetting the anticipated slowdown of PD-SOI
- › H2'17 Electronics EBITDA margin⁽¹⁾ expected in the same order of magnitude as in H1'17 (16.5%)
 - › Sustained operating profitability thanks in particular to 200mm capacity fully utilized and improved gross margin

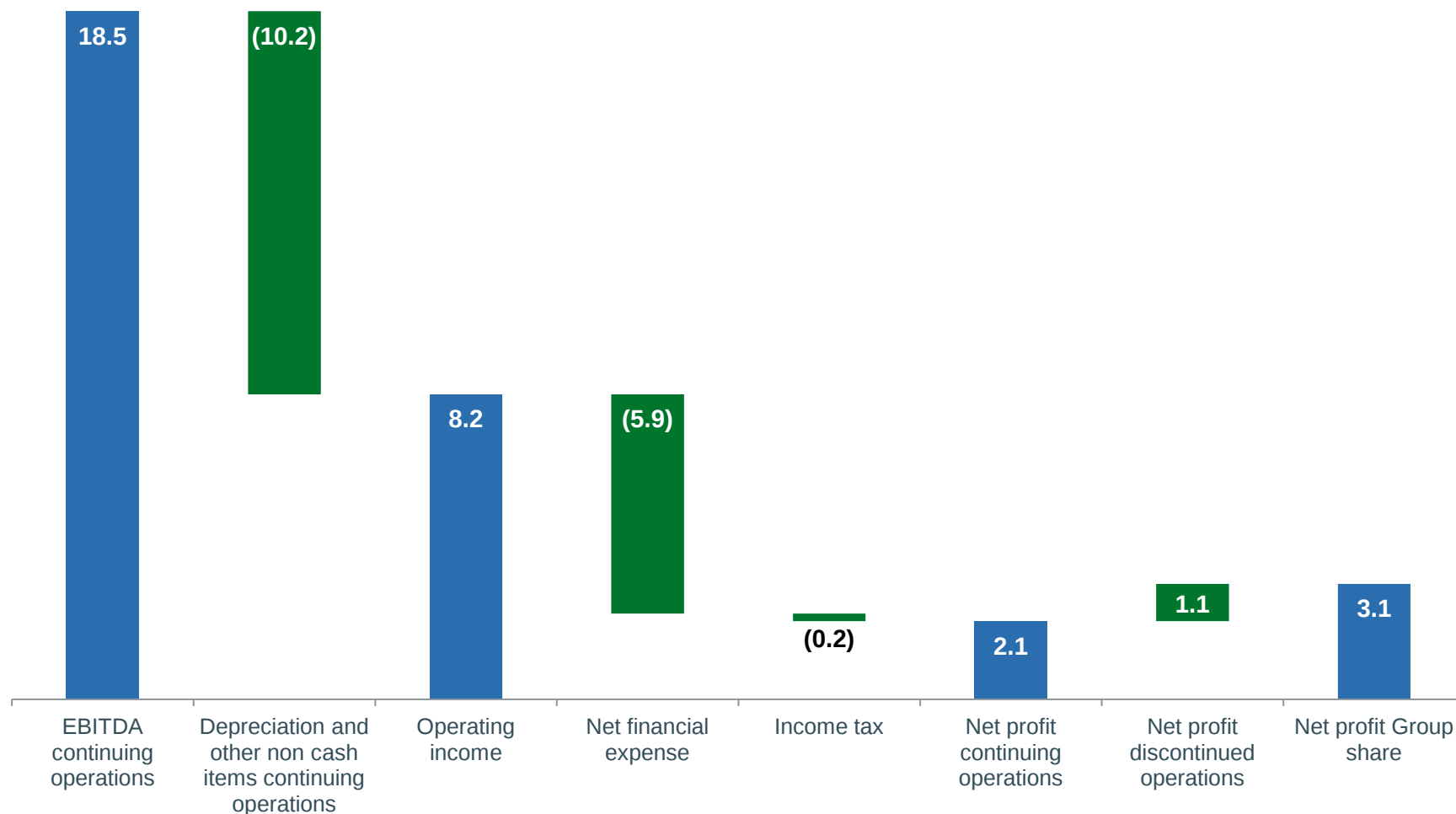
Beyond FY'17: gradual sales and EBITDA increase expected

- › Opportunity to benefit from continuous growth in RF-SOI
 - › Simgui partnership: additional capacity of 150,000 wafers by 2018 (200mm)
 - › Internal capacity to support expected growth in 300mm RF-SOI
- › Significant production capability to support the early stages of FD-SOI adoption
 - › Contemplated investment (€40m) in Bernin II to progressively boost FD-SOI production capacity from 100,000 to 400,000 wafers per year (300mm FD-SOI)

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H1'17 – from Electronics EBITDA to net profit



H1'17 cash flow statement

In million euros

	H1'17	H1'16 restated
Net cash generated by operating activities	(2.3)	1.1
<i>of which continuing activities</i>	<i>2.2</i>	<i>11.3</i>
Net cash generated by / (used in) investing activities	(2.2)	24.8
<i>of which continuing activities</i>	<i>(3.0)</i>	<i>(3.8)</i>
Share capital increases and exercise of stock options	145.3	-
ABSAAR buyback (warrant cancellation)	-	(0.7)
Issuance of debt (new loans)	-	65.4
Drawing on credit lines	9.2	-
Loan repayment (incl. finance leases)	(110.7)	(19.7)
Net financial charges	(5.4)	(4.7)
Financing flows from discontinued operations	-	(18.2)
Net cash generated by / (used in) financing activities	38.5	22.2
<i>of which continuing activities</i>	<i>38.5</i>	<i>40.3</i>
Impact of exchange rate fluctuations	0.1	-
Change in net cash	34.1	48.1
<i>of which continuing activities</i>	<i>37.8</i>	<i>59.4</i>
Cash & cash equivalents - opening	49,1	22,9
Cash & cash equivalents - closing	83,1	71,1

Consolidated balance sheet

30th September 2016

<i>In million euros</i>	30 th Sept 2016	31 st March 2016
Goodwill and intangible assets	2.8	3.8
Capitalized development projects	1.7	1.9
Property, plant and equipment	116.5	120.6
Non-current financial assets	9.9	8.9
Other non-current assets	22.1	24.7
Total non-current assets	152.9	159.9
Inventories	32.1	30.9
Trade receivables	33.6	40.4
Other current assets	20.3	17.5
Current financial assets	0.2	1.4
Cash and cash equivalents	83.1	49.1
Assets held for sale and discontinued	27.2	25.9
Total current assets	196.6	165.2
Total assets	349.5	325.1

<i>In million euros</i>	30 th Sept 2016	31 st March 2016
Share capital	60.6	23.1
Share premium	888.1	780.4
Reserves	(808.8)	(811.4)
Total equity	139.9	(7.9)
Long-term financial debt	101.9	160.0
Provisions and other non-current liabilities	16.3	14.1
Total non-current liabilities	118.2	174.1
Short-term financial debt	16.7	59.0
Trade payables	27.4	42.6
Provisions and other current liabilities	34.6	40.9
Liabilities from discontinued operations	12.8	16.5
Total current liabilities	91.4	158.9
Total liabilities and equity	349.5	325.1

Soitec technologies address large and growing markets

	Communication & Power		Digital	
	RF-SOI	Power-SOI	FD-SOI	Emerging SOI
End-markets	Smartphones	Automotive, industrial	Mobile & consumer electronics, automotive, Internet of Things	Data centers, cloud computing, image sensors
Applications	Radio-frequency front-end modules	High-voltage integrated circuits	Digital processing system on chip	Optical links (Photonics SOI), image sensors (imager SOI)
Soitec market share	SOI Smart Cut™ Market: ~70%			
Wafer size	300mm (RF-SOI production ramp-up) / 200mm		300mm (production ramp-up)	200mm and 300mm (production ramp-up)
Current Soitec revenue exposure	~60%	~20%	~15% (PD-SOI today)	~5%
Market adoption	✓	✓	Ecosystem is ready	Ecosystem is ready
Current addressable market in 2015	900k wafers per year (200mm equivalent)	350k wafers per year (200mm)	-	-
High penetration level for RF-SOI and Power-SOI and high growth potential with FD-SOI				
Soitec estimated market by 2020 ⁽¹⁾	>2m wafers per year (200mm equivalent)	>500k wafers per year (200mm)	1m to 3m wafers per year (300mm)	100k to 300k wafers per year (300mm)

Sources: Soitec, Navian, Yole, NXP Analysts Day, Cisco

(1) Company estimates based on market data, purely indicative

Thank you



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soitec