



可成科技

2023年第一季營運成果說明

2023/05



免責聲明

- This presentation contains “forward-looking statements”- that is, statements related to future, not past, events. In this context, forward-looking statements often address our expected future business and financial performance, and often contain words such as “expects” , “anticipates”, “intends”, “plans”, “believes”, “seeks”, or “will”.
- Forward-looking statements involve inherent risks and uncertainties. We caution you that a number of important factors could cause actual results to differ materially from those contained in any forward-looking statement. Such factors include, but are not limited to: our highly competitive environment; the cyclical nature of our business; our ability to develop new products; and our successful execution in new business developments.

2023年第一季財務摘要

- 營收為新台幣35.42億元，季減46.7%/年減51.0%。營收季減主因市場終端需求疲軟，組裝廠嚴控庫存，影響拉料進度。營收年減則為全球景氣低迷所致。
- 單季毛利率為22.9%，季減11.2pp/年減6.7pp。毛利率下滑，主因營收規模減少，故而抵銷產品組合調整，以及折舊費用降低所帶來的正面效益。
- 單季營業利潤率為-0.4%，季減20.8pp/年減15.5pp，主因毛利率下滑。
- 新台幣兌美元匯價升值，導致單季業外匯兌損失8.49億元。
- 受營收規模減少以及匯兌損失影響，第一季稅前淨利為11.67億元，年減61.7%；季增301.3%主因低基期。第一季稅後淨利(歸屬業主)為8.84億元，季增208.7%/年減57.0%。
- 基本EPS為NT\$ 1.25元 (4Q22：NT\$ 0.40元；1Q22：NT\$ 2.81元)。
- 資本支出為0.73億 (上季NT\$ 88mn；去年同期NT\$ 147mn)。
- 折舊攤銷費用為7.46億元，上季為7.74億元，2022年第一季度為9.31億元。
- EBITDA 為7.30億元，上一季為21.31億元，2022年第一季度為20.25億元。

* EBITDA = Operating Profit + Depreciation + Amortization

合併損益表 1Q23 vs. 4Q22

(In NTD mn)	1Q23		4Q22		qoq
	金額	%	金額	%	
營業收入	3,542	100.0%	6,646	100.0%	-46.7%
營業毛利	812	22.9%	2,267	34.1%	-64.2%
營業費用	828	23.4%	910	13.7%	-9.0%
營業利潤	(16)	-0.4%	1,357	20.4%	-101.2%
營業外收入	1,183	33.4%	(1,066)	-16.0%	N.M.
稅前淨利	1,167	33.0%	291	4.4%	301.3%
稅後淨利 (歸屬業主)	884	25.0%	286	4.3%	208.7%
基本每股盈餘	\$ 1.25		\$ 0.40		\$ 0.85
EBITDA	730	20.6%	2,131	32.1%	-65.7%

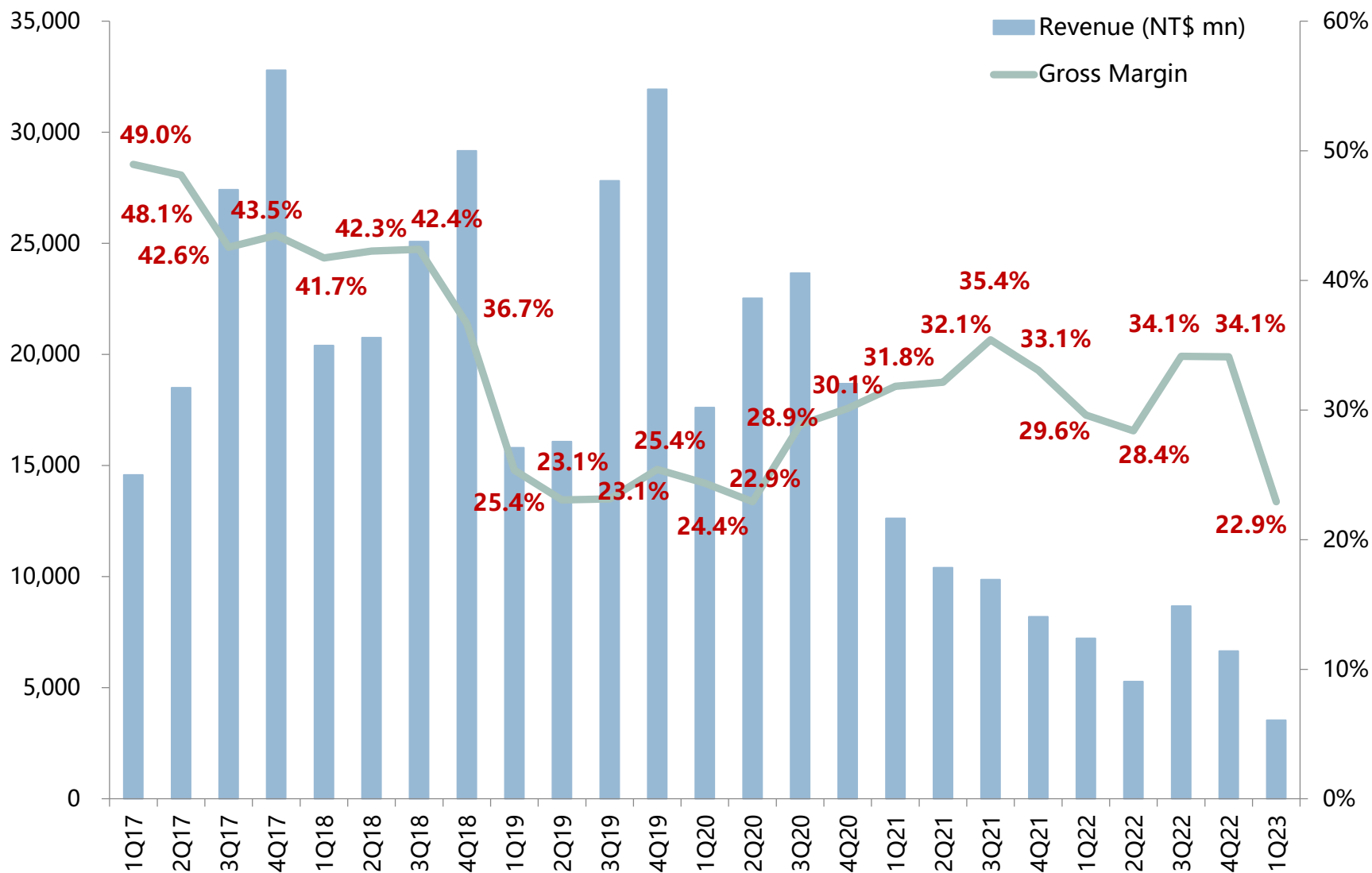
註：1Q23匯兌損失為NT\$ 849mn

合併損益表 1Q23 vs. 1Q22

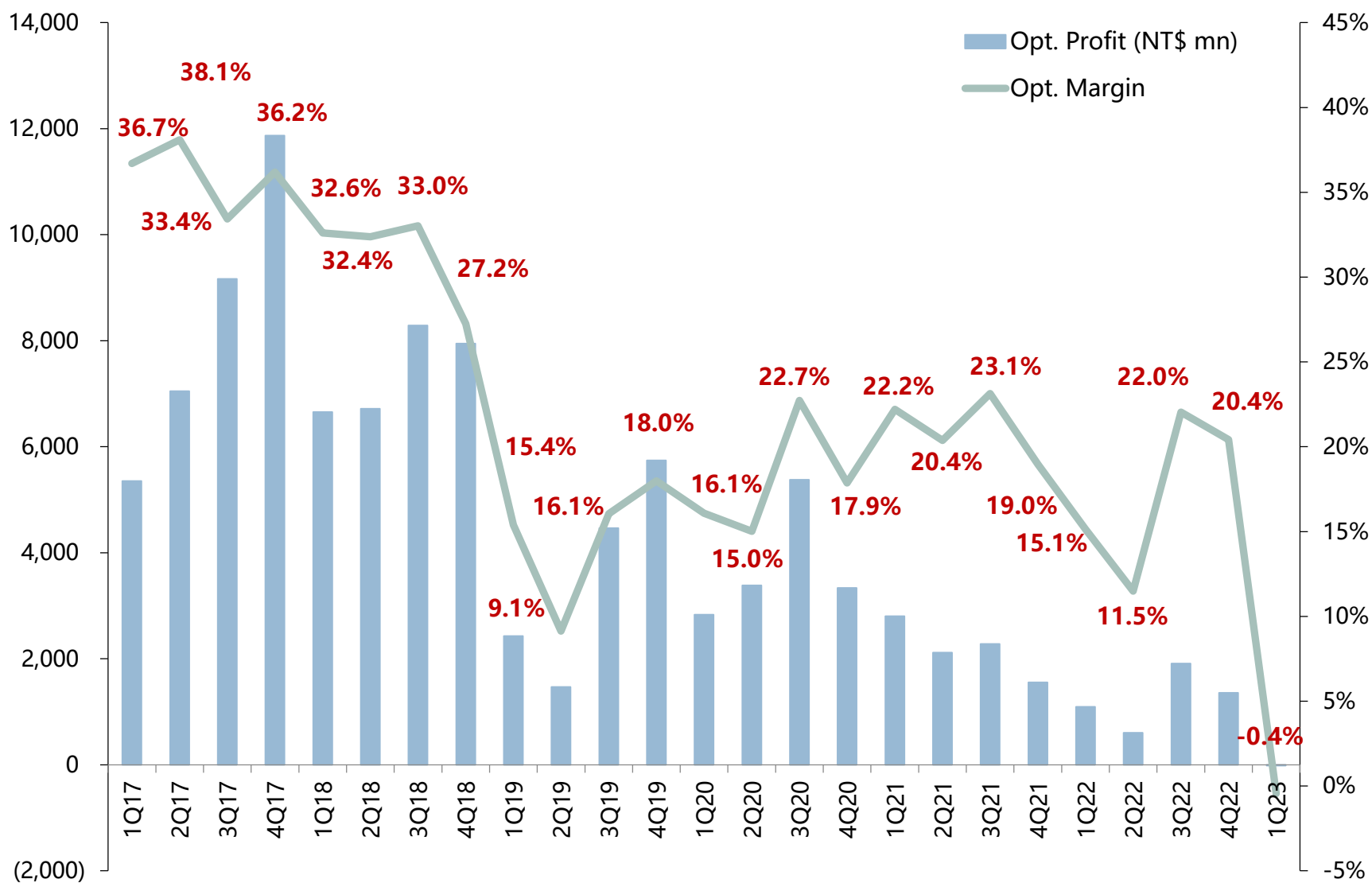
(In NTD mn)	1Q23		1Q22		yoy
	金額	%	金額	%	
營業收入	3,542	100.0%	7,221	100.0%	-51.0%
營業毛利	812	22.9%	2,139	29.6%	-62.0%
營業費用	828	23.4%	1,046	14.5%	-20.9%
營業利潤	(16)	-0.4%	1,093	15.1%	-101.4%
營業外收入	1,183	33.4%	1,951	27.0%	-39.4%
稅前淨利	1,167	33.0%	3,045	42.2%	-61.7%
稅後淨利 (歸屬業主)	884	25.0%	2,057	28.5%	-57.0%
基本每股盈餘	\$ 1.25		\$ 2.81		-\$ 1.56
EBITDA	730	20.6%	2,025	28.0%	-63.9%

註：1Q23匯兌損失為NT\$ 849mn

近年營業收入&毛利率



近年營業利潤&營業利潤率



合併資產負債表

(In NTD mn)	1Q23		4Q22		1Q22	
總資產	242,532	100%	241,563	100%	244,770	100%
現金及約當現金	63,547	26%	57,529	24%	41,424	17%
流動資產	152,657	63%	188,978	78%	193,668	79%
固定資產	13,823	6%	14,338	6%	17,559	7%
總負債	81,671	34%	75,760	31%	87,750	36%
流動負債	75,047	31%	69,192	28%	81,143	33%
長期負債	6,624	3%	6,568	3%	6,607	3%
母公司股東權益	160,850	66%	165,792	69%	157,010	64%
負債及股東權益總計	242,532	100%	241,563	100%	244,770	100%
每股淨值	228.1		230.2		214.4	
Weighted Avg Shares (mn)	705.168		720.239		732.153	

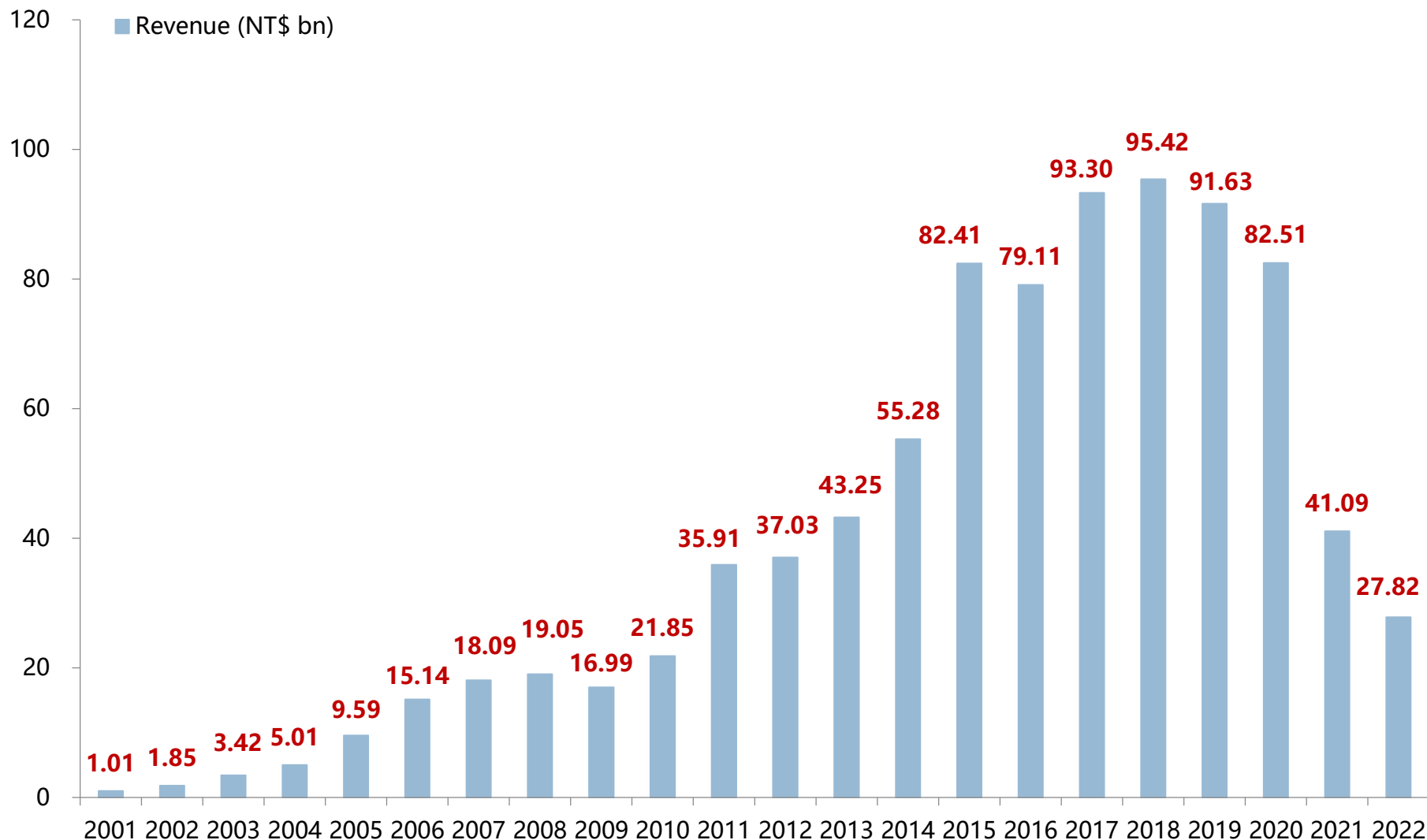
合併現金流量表

(In NTD mn)	1Q23	1Q22
期初現金	57,529	53,115
營運活動之現金流入(出)	2,765	2,992
折舊&攤銷	746	931
投資活動之現金流入(出)	2,216	(7,019)
資本支出	(73)	(147)
融資活動之現金流入(出)	1,299	(8,854)
長短期借款	7,680	(7,009)
匯率影響數	(263)	1,190
現金水位變化	6,017	(11,691)
期末現金	63,547	41,424
EBITDA	730	2,025
自由現金流量	2,693	2,844

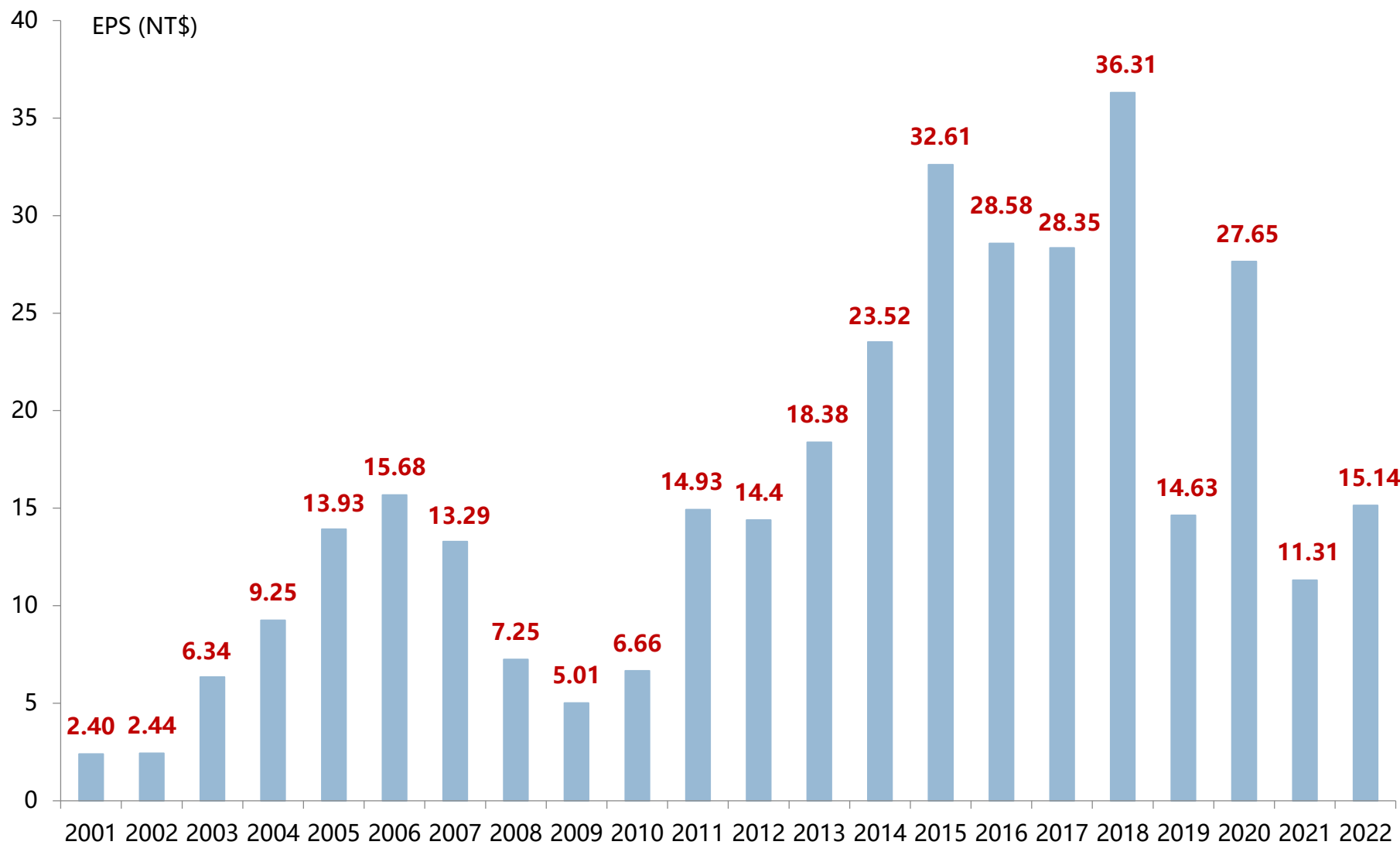


參考附錄

營收趨勢 (2001 – 2022)



基本每股盈餘趨勢 (2001 – 2022)





Catcher Technology

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Investor Relations

Nora Hou (侯乃鳳)

nora.hou@catcher-group.com

+886-2-2701-5900 # 2811

IR@catcher-group.com

<http://www.catcher-group.com>

Abby Chu (朱芷萱)

abby.chu@catcher-group.com

+886-2-2701-5900 # 2812

