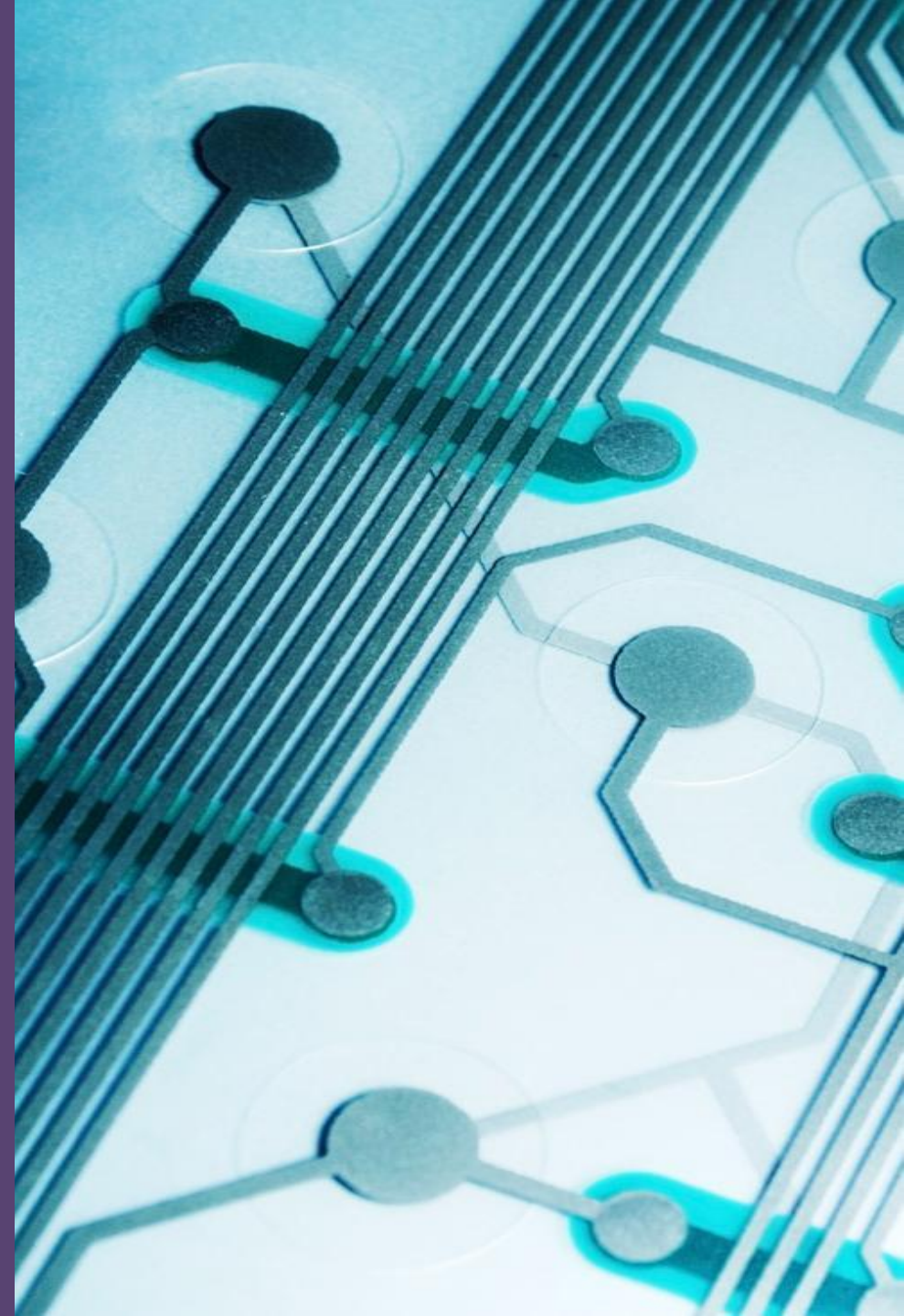




MULTEK

Reinvigorating Product Strategy

Peter Yu
April 2016



Contents

- Introduction
- Market Trends
- Connecting the Dots
- Reinvigorating Your Product Strategy
- Summary

Introduction - Company



- Top 20 PCB Company (Prismark 2016)
- Founded 1978 -- includes acquired businesses with legacy dating to 1950's Apollo missions
- Offices in 15 countries, including factories in China, US & Philippines
- Headquartered in Hong Kong, R&D labs in Silicon Valley & China
- Wholly-owned by Flex (Nasdaq: FLEX), but independently managed



- Flex (formerly Flextronics) is a 26B USD global leader in design, manufacturing, distribution & aftermarket services
- Headquartered in San Jose, California, with 200,000 employees across 30 countries
- Provides downstream intelligence and vertical integration advantages to Multek
- Both companies excel in the development of innovative technologies, sketch to scale thinking, and state-of-the-art manufacturing

Multek Serves All Markets – and the Digitalization of Everything is Driving Growth



Telecommunications
& Networking



Mobility



Connected Home



Server/Storage



Automotive



Security/Aerospace



Commercial



Energy



Industrial



Computing

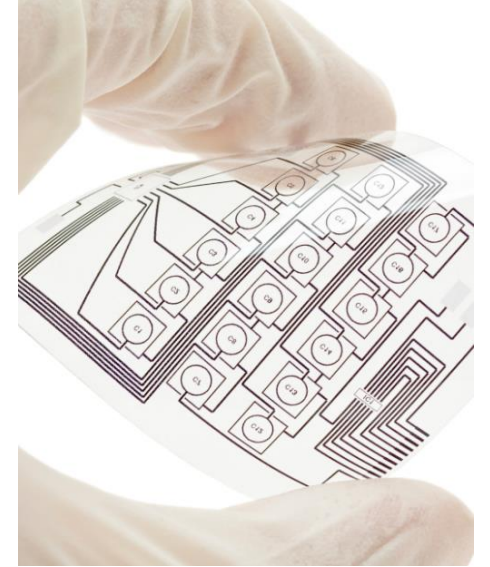
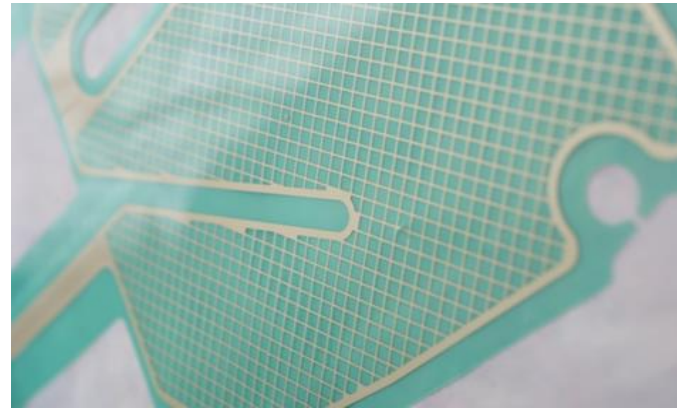
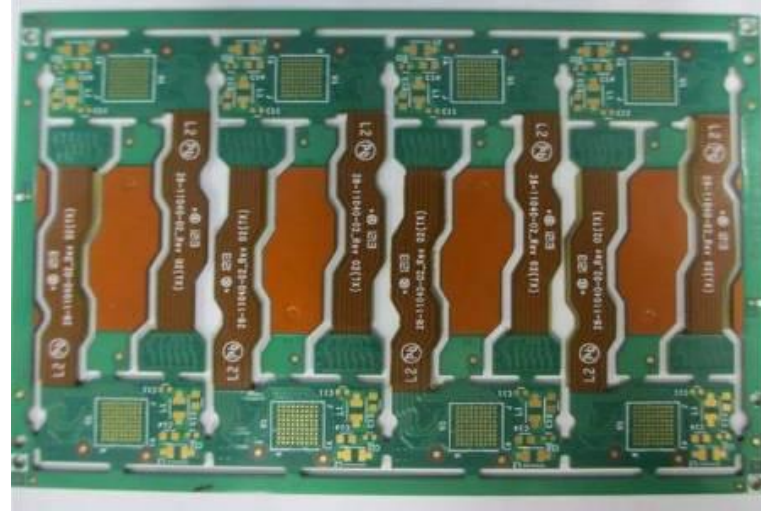
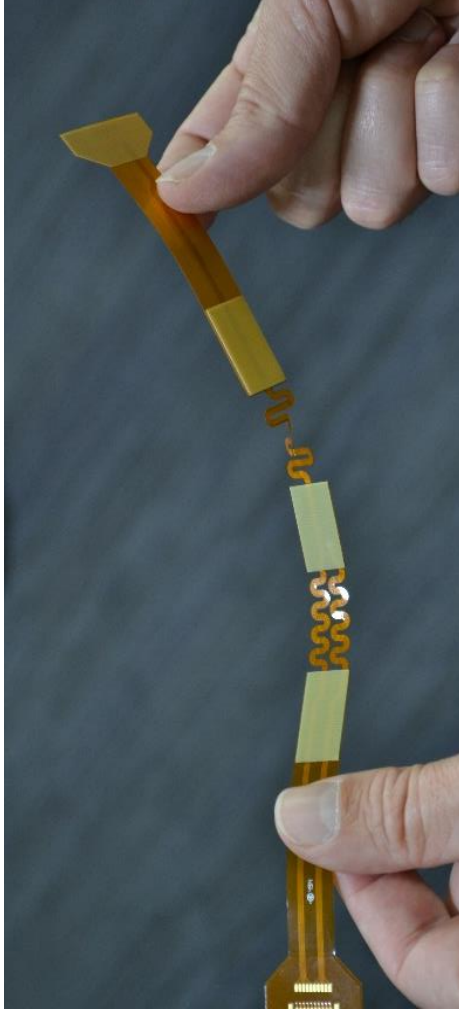
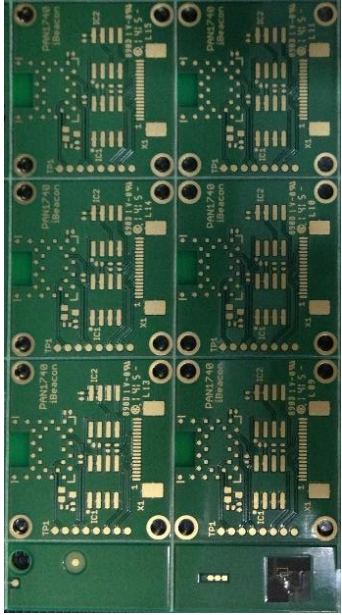


Medical



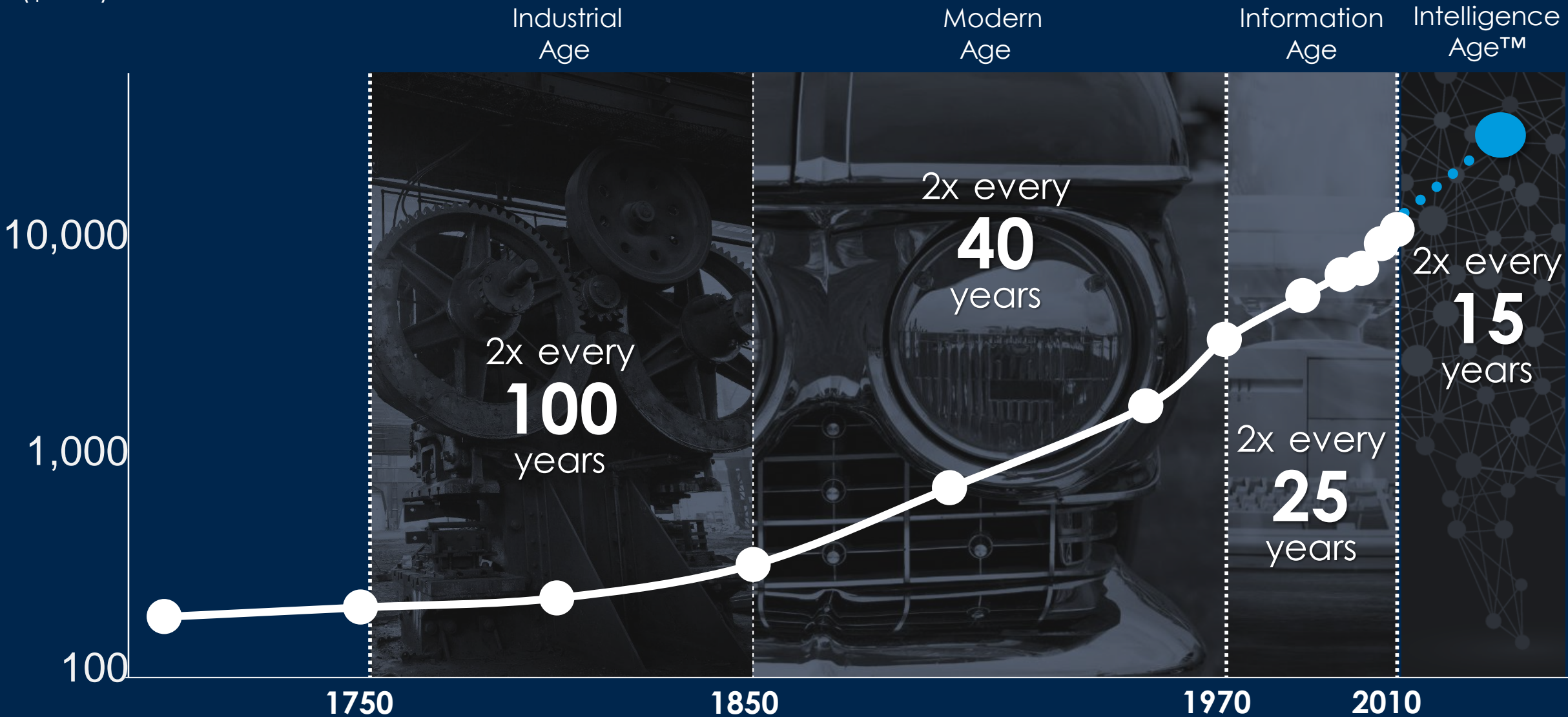
Semiconductor
Equipment

Printed Circuit Boards: a 1-slide Primer



Average World GDP per Capita

(\$ USD)



Connected Cars

Number of vehicles with embedded connectivity*

23M
in 2015

152M
in 2025

21%
CAGR

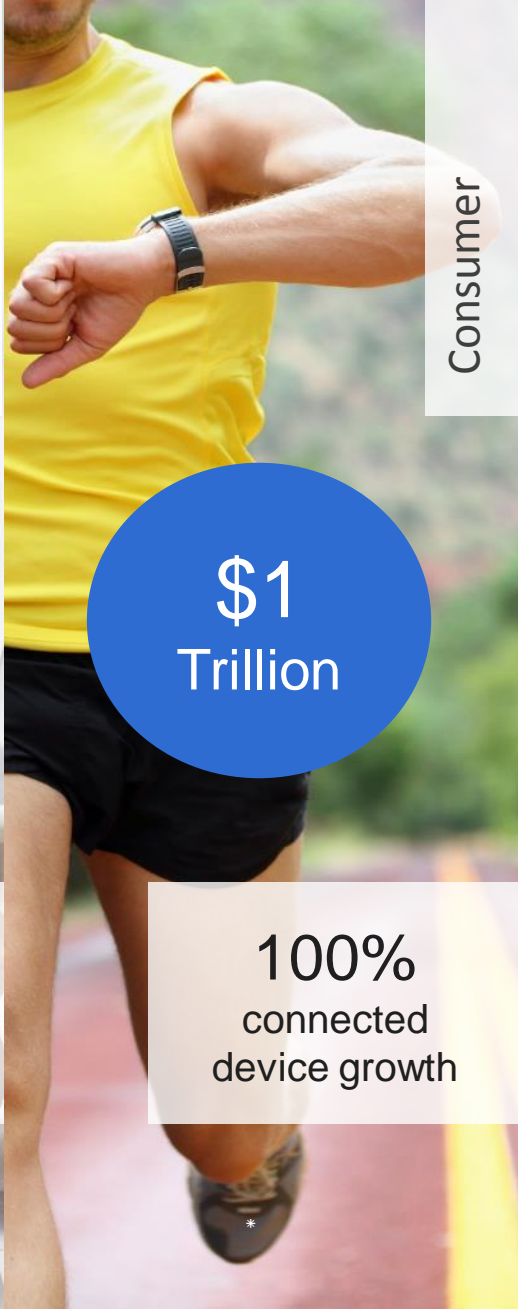
*Source: IHS Automotive Research



Healthcare

\$2
Trillion

10-20%
chronic disease cost
reduction



Consumer

\$1
Trillion

100%
connected
device growth



Energy

\$500
Billion

2.5-5%
operating cost
savings



Transportation

\$200
Billion

25%
vehicle damage cost
reduction



Agriculture

\$100
Billion

10-20%
yield increase
in application

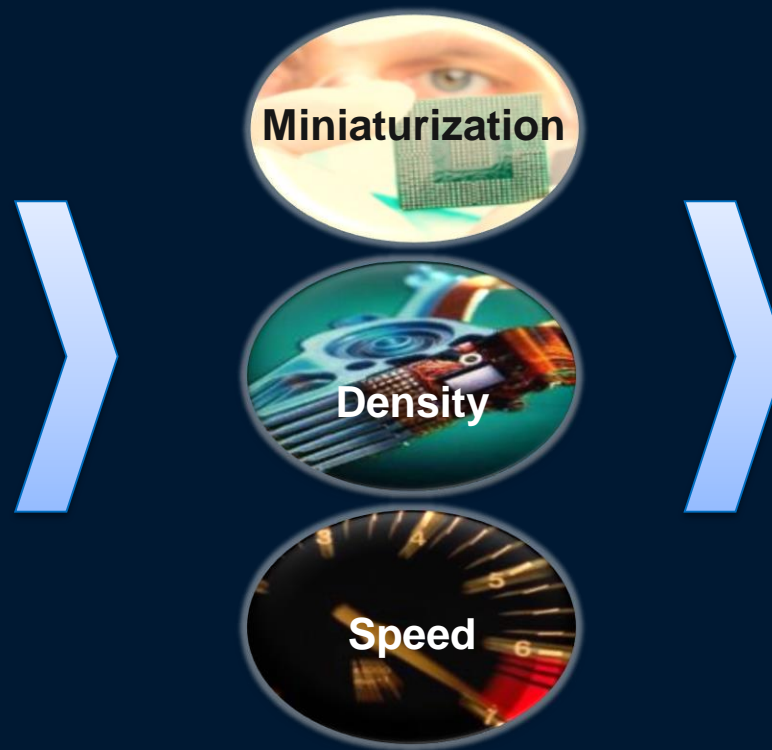
*Potential Economic Impact in 2025
Source: McKinsey Global Institute, Machina Research

Market & Technology Trends are Intersecting to Create New Opportunities

Shifting Markets



Technology Trends

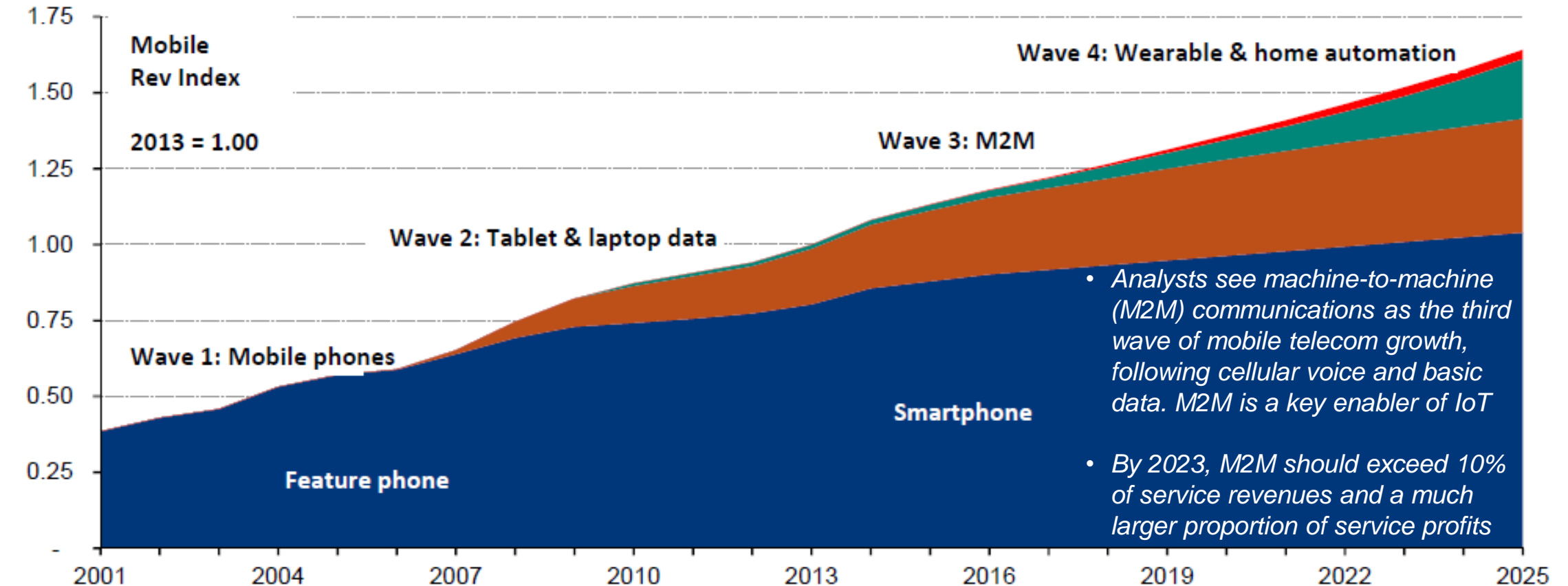


Break-through Products

- Smart motorcycle helmets
- Fitness watches
- Self-driving, electric vehicles
- Wearable metronomes
- Diagnostic toothbrushes
- Smart contact lenses
- and more...

M2M Communications is Seen as the 3rd Wave of Mobile Telecom Growth

Chart 1: Mobile operator top-line – four waves of growth



- Analysts see machine-to-machine (M2M) communications as the third wave of mobile telecom growth, following cellular voice and basic data. M2M is a key enabler of IoT
- By 2023, M2M should exceed 10% of service revenues and a much larger proportion of service profits

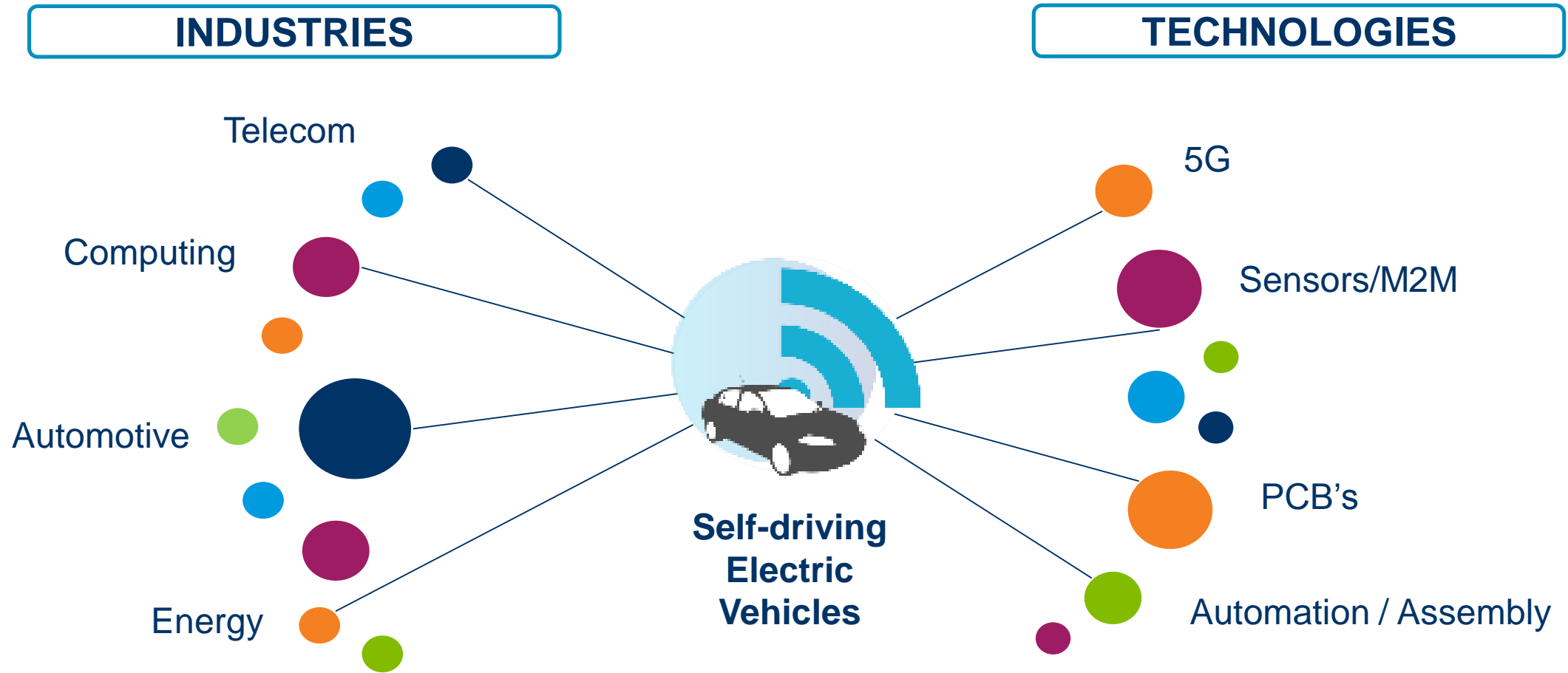
Source: BofAML Global Research estimates

...simply connect the dots



IDC 2015

Strategy helps Connect the Dots Across Industries & Technologies

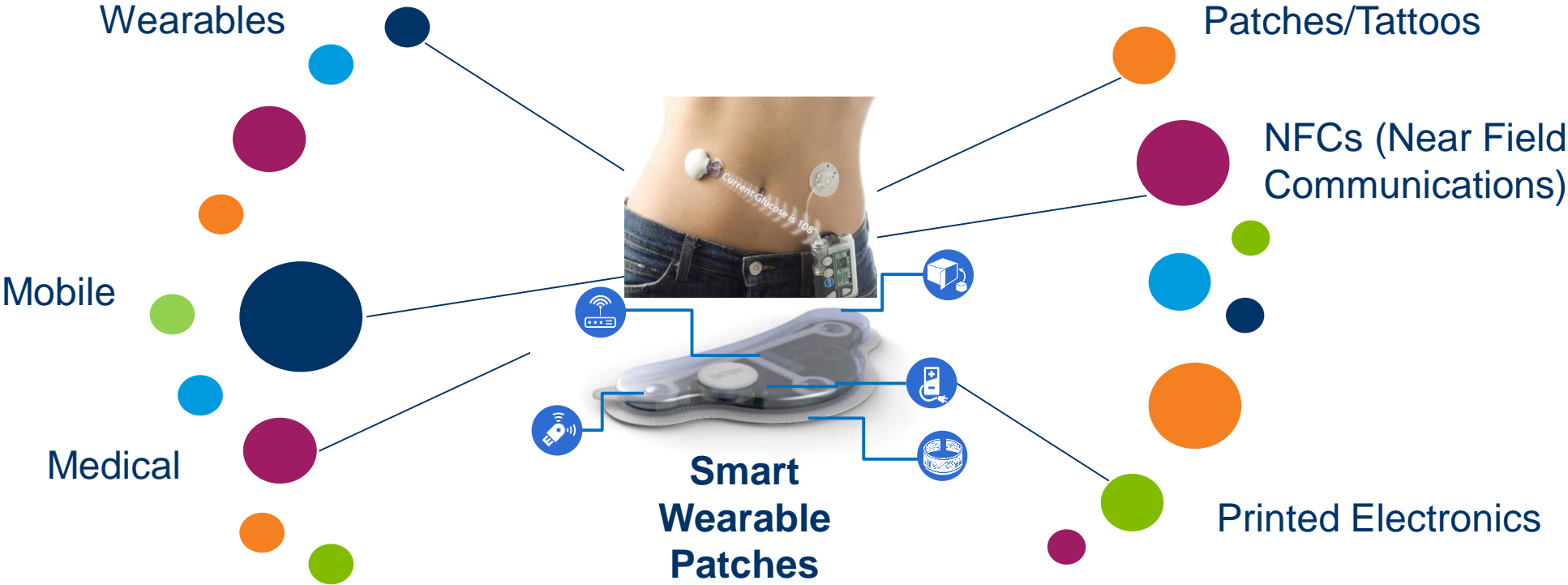


Connecting the Dots in Digital Health



INDUSTRIES

TECHNOLOGIES



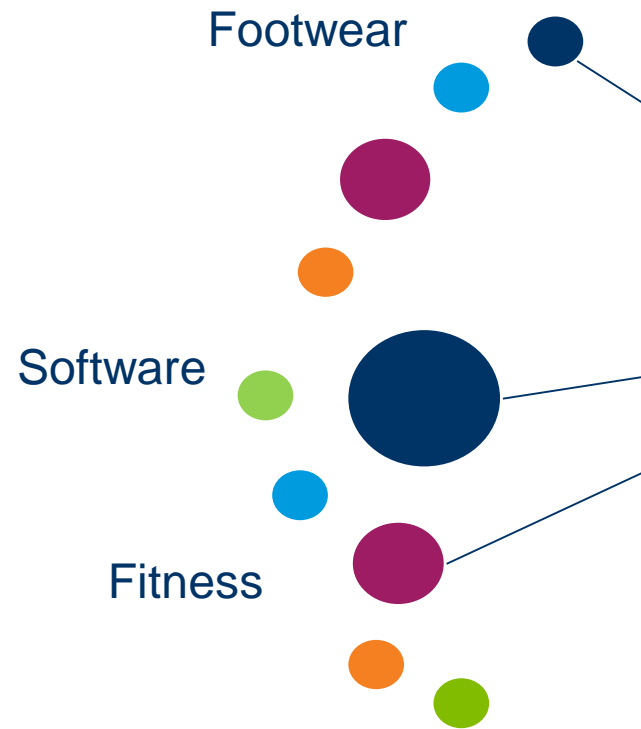
Connecting the Dots in Wearables

72M
in 2015

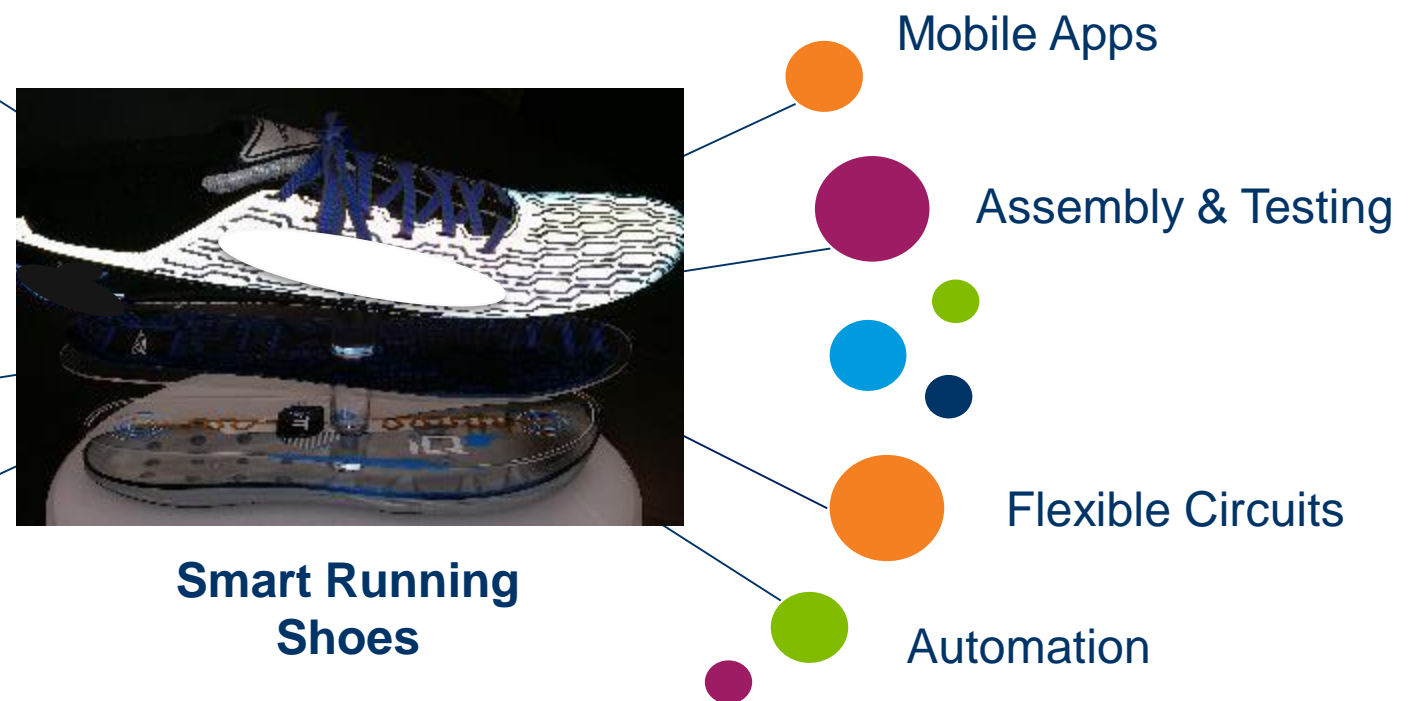
156M
in 2019

42%
CAGR

INDUSTRIES



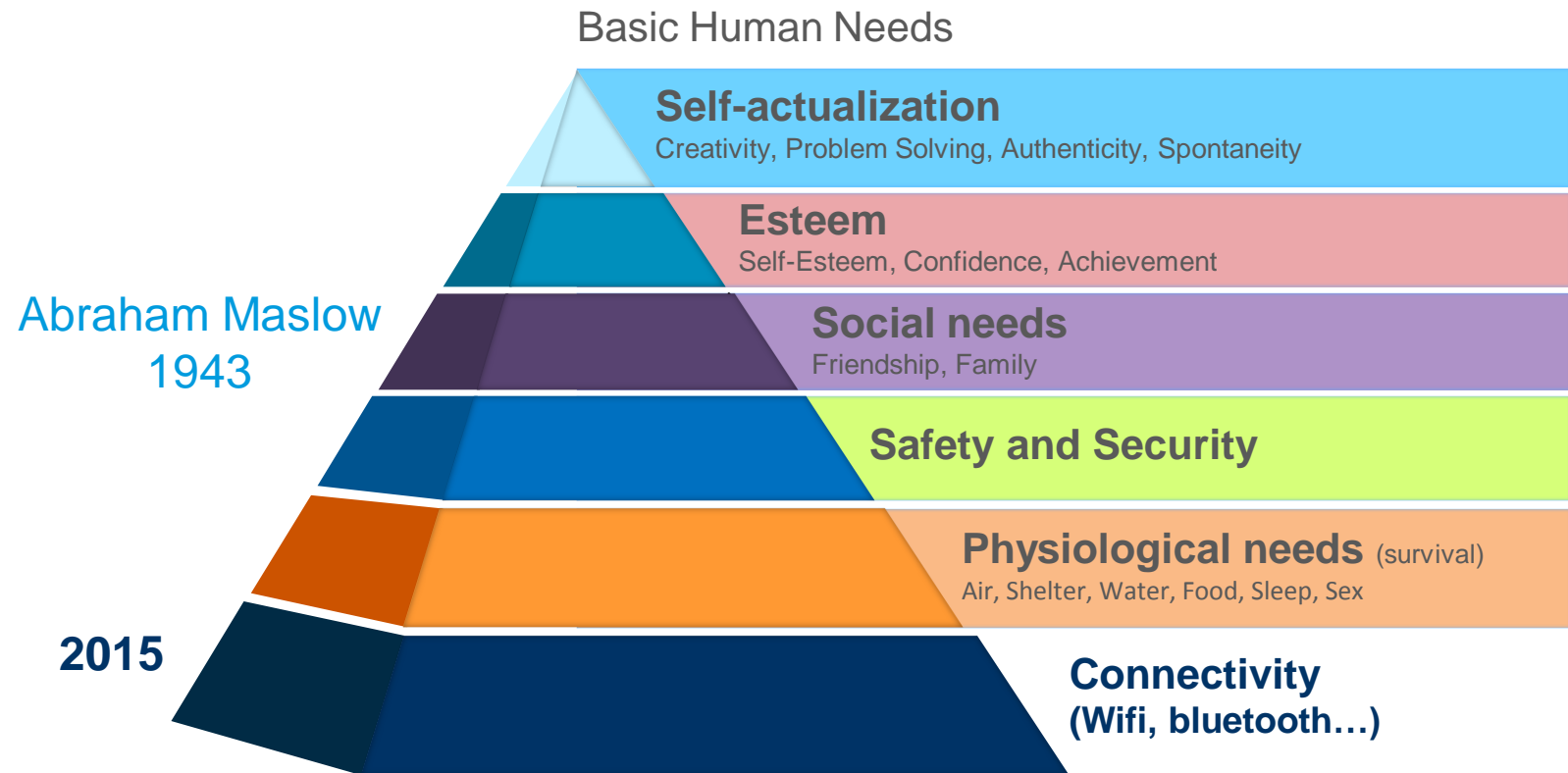
TECHNOLOGIES



Source: IDC Worldwide Quarterly Wearable Device Tracker 2015

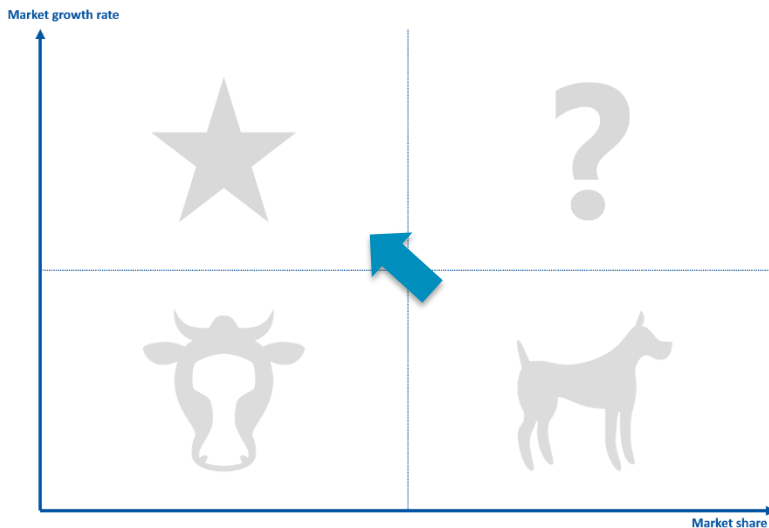
The Digitalization Era – Time to Reinvigorate Your Product Strategy

Connectivity is an enabler to win...



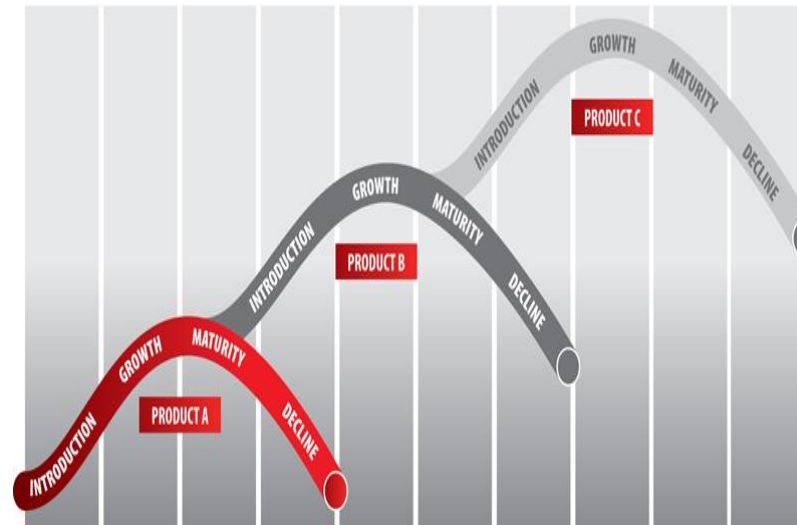
Benefits of Digitalizing Products

Turn Bad Products into Good Products



BCG Matrix

Extend Existing Products



Booz Product Lifecycle

Launch New Products



Bain Adjacency Map

Digitalization offers differentiation, can be game-changing, and keeps you at the forefront of innovation

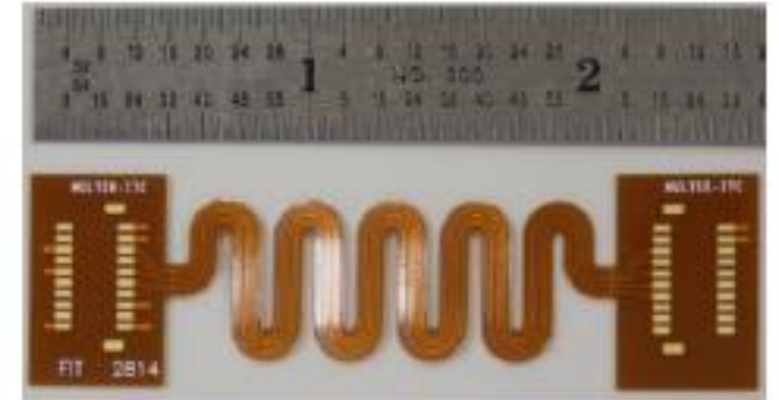
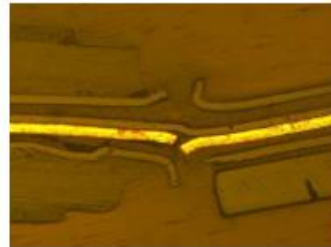
Technologies Enabling Digitalization – RipStop™ Flexible Circuits



dropping
compression
twisting
flexing



electrical
failure



Stretchable/Twist Circuit



Technologies Enabling Digitalization – Novaclad™ Technology



VIVALINK

eSkin™ - enabling
electronic communication



Leverage Partners who Understand Technology Trends Across Verticals

Markets



Trends



Density



Speed



Miniaturization

Multek Solutions

Talent & Interconnect Technology Centers:

Technology Platform

New Characteristics / Featuring

HDI, Signal Integrity, ELIC, Rigid-flex, etc.

New Materials

Thermal Management, High-speed Materials, etc.

New Processes

Printed Electronics, Direct Metallization

Tools & Methods:

- Materials Development & Evaluation
- IP Generation
- Early Engagement Model
- Advanced Measurement and Reliability
- Predictive Modeling

- Worldwide Network of Field Application Engineers
- Interconnect Technology Centers in Silicon Valley & China

- Technology Roadmap
- Predictive Modeling

Companies

Americas

Asia

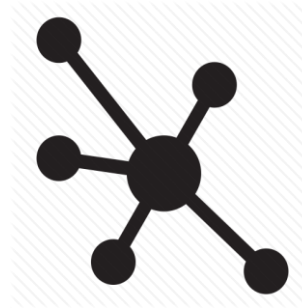
Europe

Rest of World

Summary



The Intelligence of Things is changing the way we live, work and play



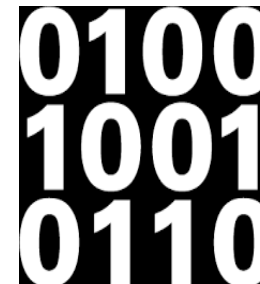
Those who “connect the dots” can gain break-through strategies



Using enabler technologies and experienced partners can make the difference



New market and technology trends are opening doors to many opportunities



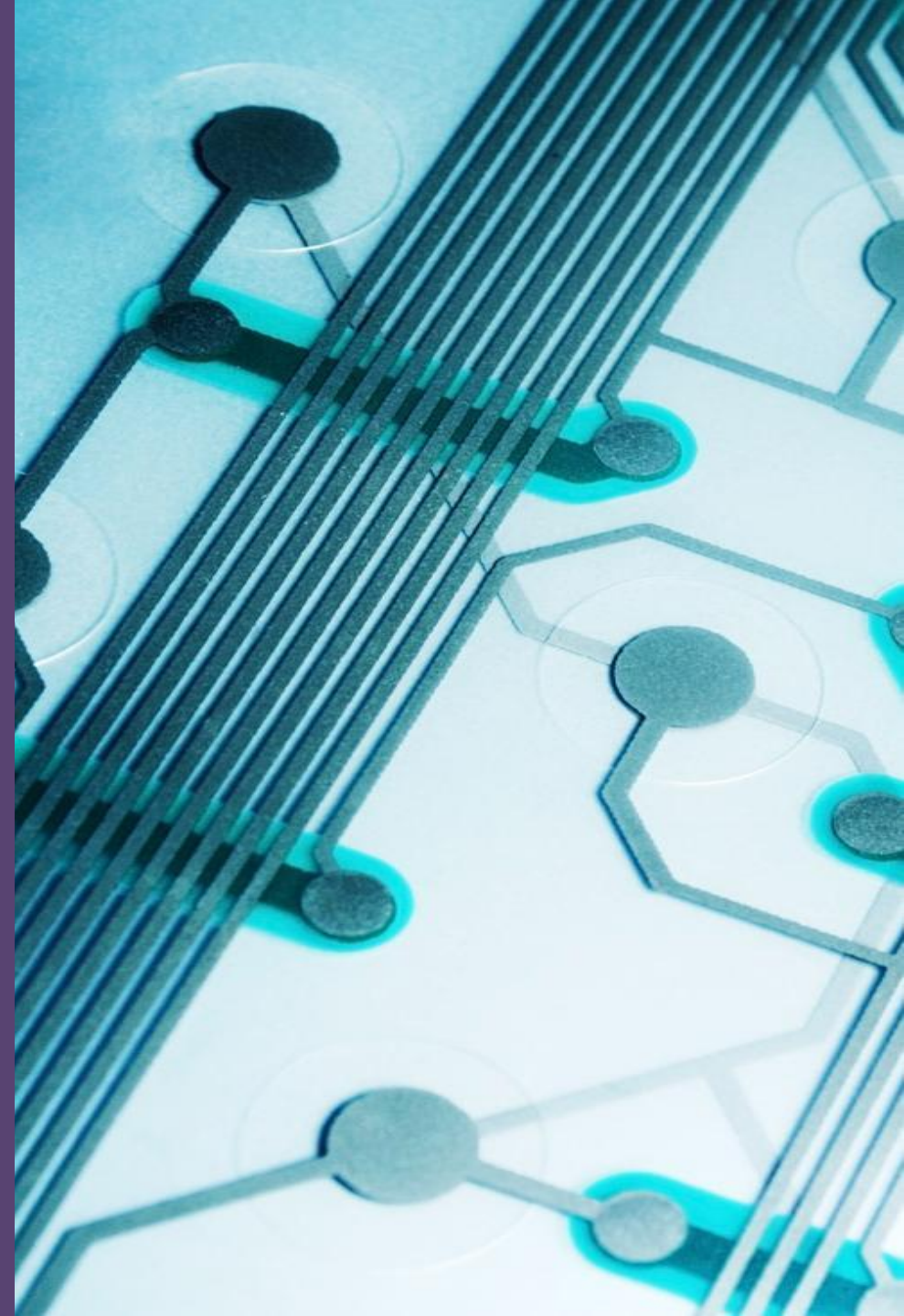
Digitalization reinvigorates products but requires creativity and know-how



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Video

http://running.competitor.com/2015/08/video/first-look-altra-iq-the-high-tech-shoe_133068





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Thank You!

