



BERENBERG EXPERT CALL



BERENBERG
PARTNERSHIP SINCE 1590

Semiconductors 101

An expert discussion on key industry trends

Berenberg is delighted to invite you to an expert call to discuss key topics including:

- Rising chip complexity and the impact on semi equipment demand (opportunity to discuss Moores Law, front-end vs back-end)
- How demand for high-performance computing and AI is shaping semi investment (opportunity to discuss newer solutions such as HBM)
- The competitive landscape across semi suppliers and the hyperscalers

with

Dr Ajay Kumar

(Former Manager at Applied Materials; Advisory Consultant)

Ajay has over 30 years of expertise in the wafer fabrication equipment industry, including 25 years at Applied Materials, where he led various business units. Today he is an Advisory Consultant.

Hosted by

Patrick Laager (Swiss Equities)

Tammy Qiu (Large-Cap Semis & Equipment)

Lucas Glemser (Swiss Equities)

There will be an opportunity for a Q&A.

MONDAY
13 MAY 2024

15:00 BST
16:00 CEST
10:00 EST

To register for the call click [HERE](#). Please fill in the registration form. Joining details shall follow via email.

If you have any questions, please contact Patrick.Laager@berenberg.com

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