King Slide®

PROFESSIONAL MECHANICAL DESIGNER AND MANUFACTURER
PRECISION SLIDE RAIL KITS FOR OFFICE, HOME AND COMPUTER

股票代碼：2059

川湖科技股份有限公司
KING SLIDE WORKS CO., LTD

King Slide®

COMPANY PROFILE

Ticker Symbol: 2059

Company Profile

The Plant / Facility

Current Business Overview

2011/2012 Consolidated Sales Breakdown

Product Markets—Electronics Application

Product Markets—Global Server Market Share

Product Markets—Slide, Hinge, Kitchen

Product Markets—Kitchen Market Share

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- A professional in innovative, ergonomic mechanism/product design
- A total solution provider in mechanical mobility products
- No.1 server rail kits manufacturer in Asia

Company Overview

- Established: 1986
- Headquarters: Kaohsiung, Taiwan
- Capital: US$ 31.7 millions
- Total employees: More than 850 employees

Milestone

- 1986: Conventional slides and hinges
- 2000: Rail and Rail kits
- 2001: Trial order from Compaq
- 2002: Certified by IBM, HP, Sun ….
- 2003: 1U -7U Rail and Rail Kits
- 2005: **IPO with a price of NT$106 in OTC market**
- 2006: Certified by DELL
- 2007: King Slide Technology established
- 2008: Listed in Taiwan Stock Exchange Corporation

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THE PLANTS / FACILITIES

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HEADQUARTER: KING SLIDE WORKS CO., LTD

Total Area: 1.98 Hectare
Location: Kaohsiung, Taiwan

SUBSIDIARY: KING SLIDE TECHNOLOGY CO., LTD

First phase of area: 5.63 Hectare (Total 4 phases)
Total Area: 46.08 Hectare
Location: Kaohsiung Science Park, Taiwan

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CURRENT BUSINESS OVERVIEW

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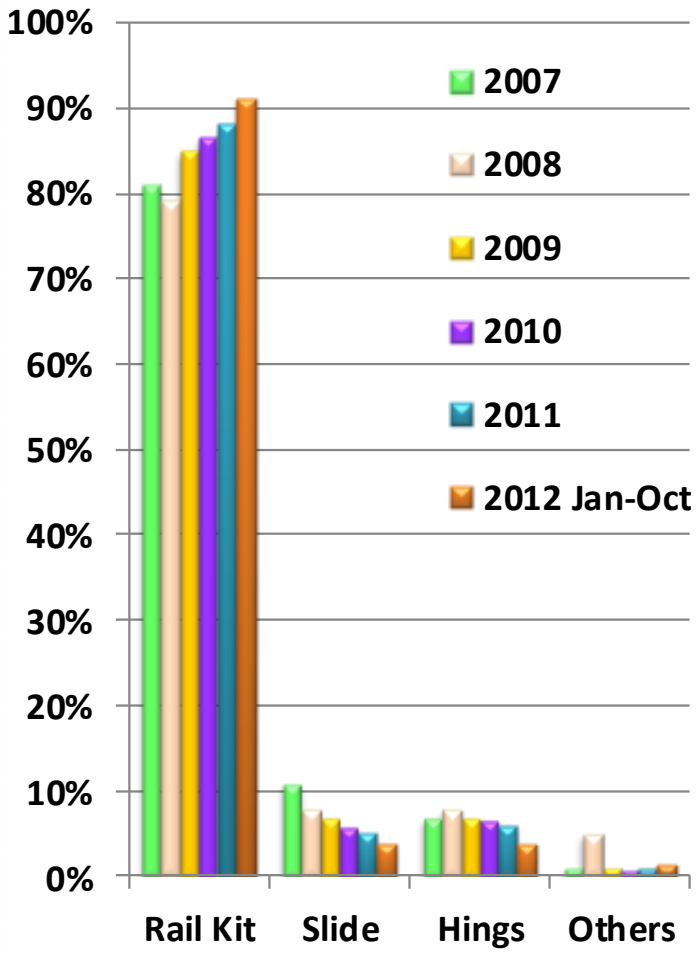
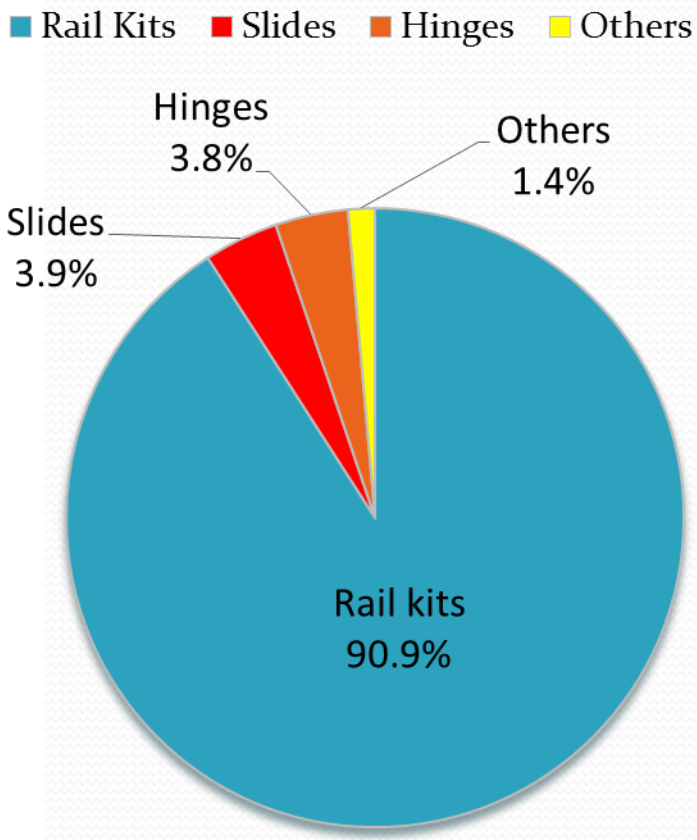
2007 to Jan-Oct of 2012 Sales Breakdown



Jan-Oct 2012 Sales Breakdown



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2011 / 2012 CONSOLIDATED SALES BREAKDOWN

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UNIT: NT$1,000	Sales	Q1	Q2	Q3	Q4	Aug	Sep	Oct	Jan-Oct
2012	Rail Kit	656,965	802,925	860,800		274,985	294,023	314,188	2,634,878
	Slide	26,446	40,677	37,737		10,622	11,529	7,624	112,484
	Hings	30,886	34,593	33,266		12,474	6,964	12,450	111,195
	Others	13,119	11,871	13,967		6,289	4,348	1,968	40,925
	Total	727,416	890,066	945,770		304,370	316,864	336,230	2,899,482
2011	Rail Kit	506,188	537,755	574,765	683,155	196,177	186,129	206,596	1,825,304
	Slide	33,272	33,807	27,986	38,234	9,078	7,877	9,813	104,878
	Hings	39,869	40,543	37,040	38,800	15,588	9,143	13,583	131,035
	Others	4,022	4,917	4,730	12,377	823	2,302	1,962	15,631
	Total	583,351	617,022	644,521	772,566	221,666	205,451	231,954	2,076,848

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PRODUCT MARKETS – ELECTRONICS APPLICATION

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GLOBAL SERVER MARKET SHARE ILLUSTRATION

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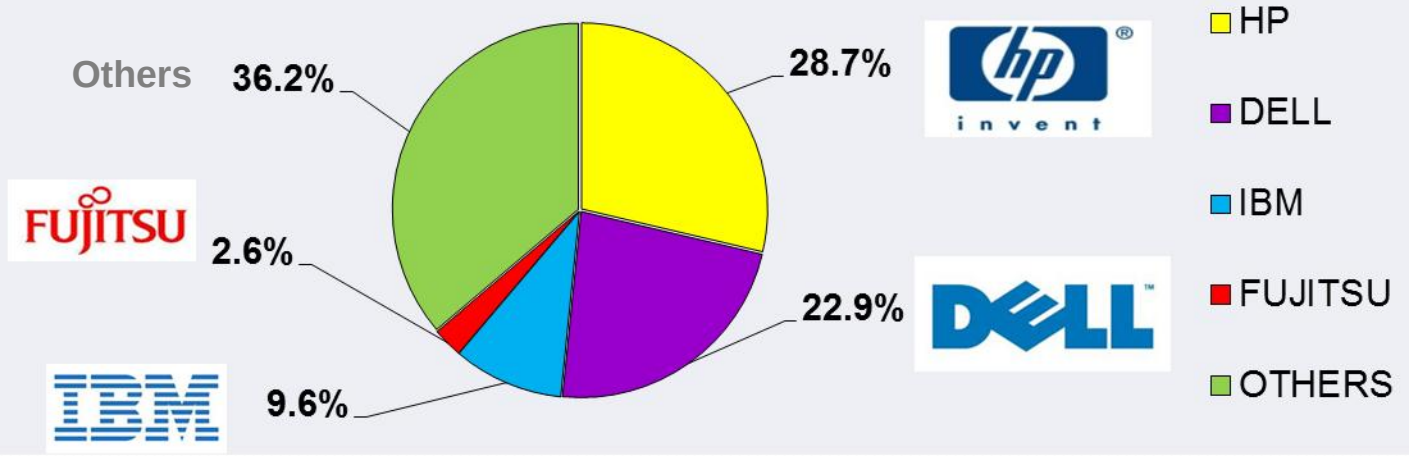
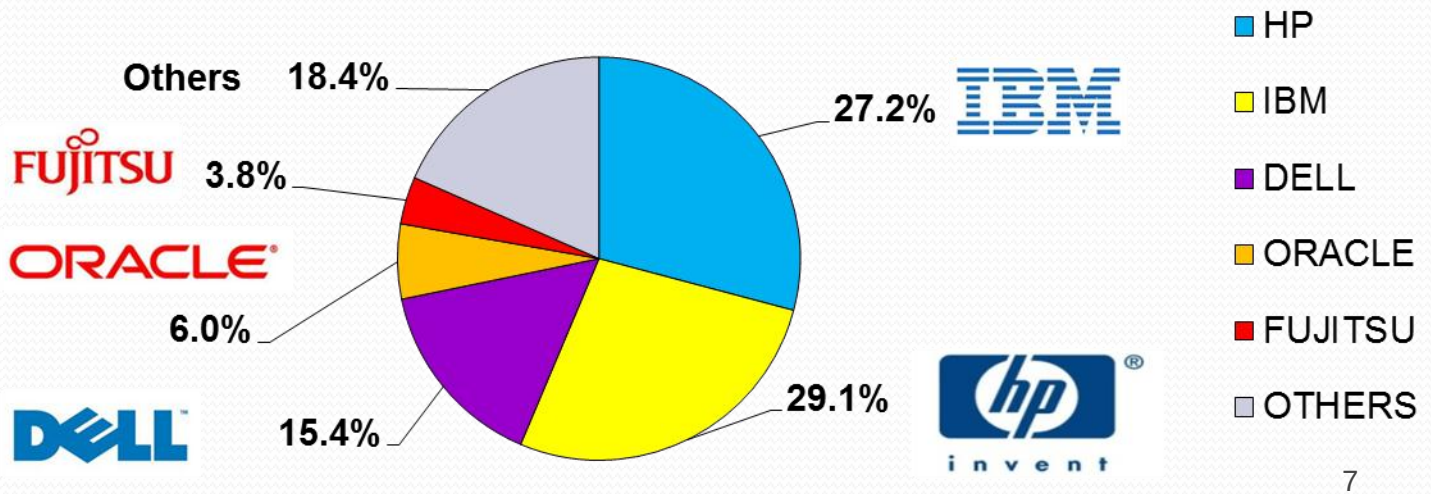
2012 Q2 Global Server Market Share (Units)



Source: Gartner August 2012

2012 Q2 Global Server Market Share (Revenue)



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PRODUCT MARKETS – SLIDE, HINGE, KITCHEN

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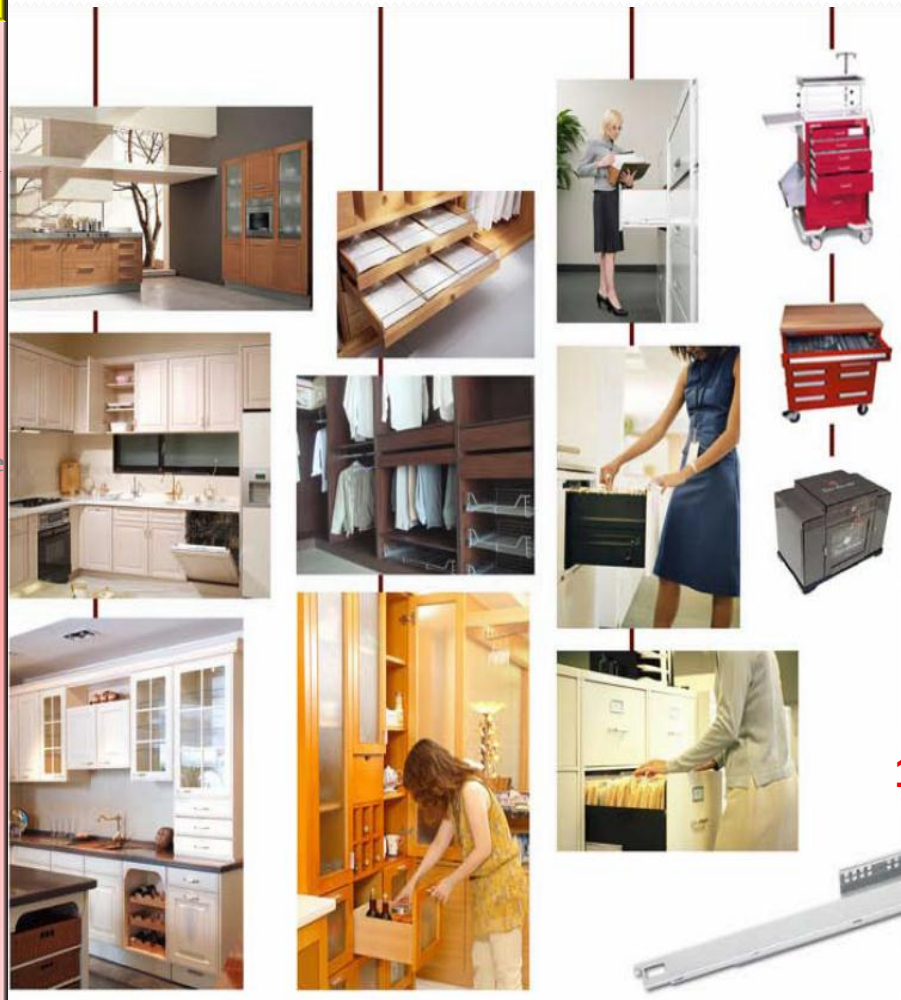
Kitchen Cabinet | Home Furniture | Office Furniture | Others



1A88

New Product
Push Open with
Soft Closing

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HIGH END KITCHEN SLIDE MARKET SHARE ILLUSTRATION

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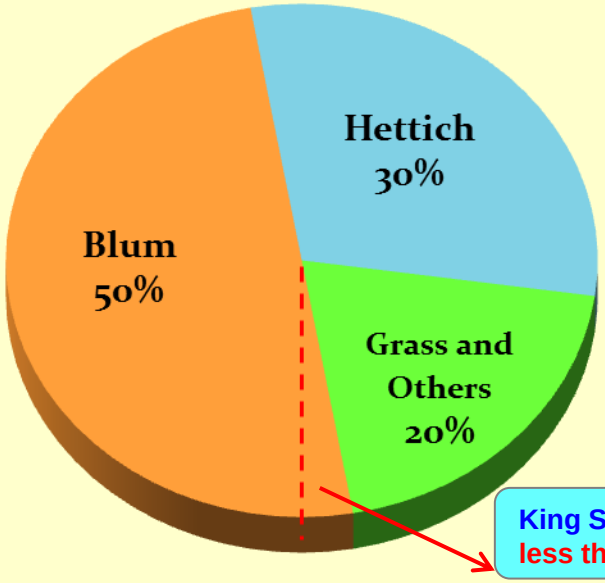
Current Kitchen Slide Market Share

--High sales volume expectation



**** Global Market Value US$3.5 Billion ****

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CREATE ENTRY BARRIER

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King Slide's Leading Top R&D team and Manufacturing capability to the pierce market and meet customer needs.

Leading integrated design and manufacturing technology → Anticipate customer & market needs → Utilize advanced R&D ability to design prospective products → Extensive IP arrangements With golden patents → Integrated Design Capability + Advanced Manufacturing Technology Capability → Total solution OBM Products

King Slide is Leading 2-3 years in advance than its competitors

Create High Entry barrier in the industry

TOP

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MECHANICAL IP

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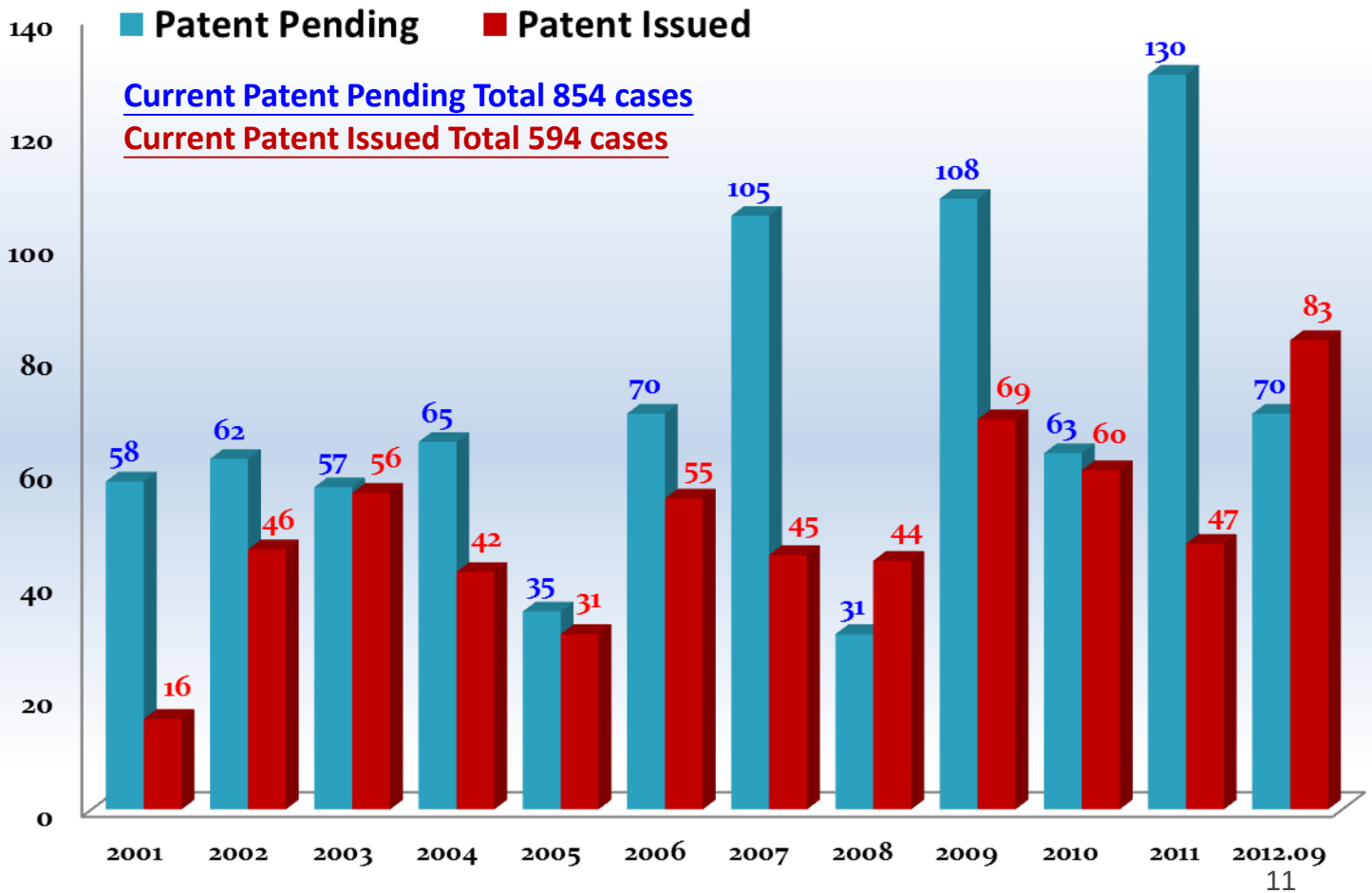
King Slide's IP Growth in Patent are allocated in CANADA, USA, Europe, UK, Germany, Japan, Taiwan, and China

King Slide's ownership of IP patents Growth Chart (Continue to increase)



CORE COMPETENCIES

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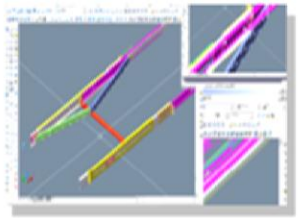
King Slide's Core Competencies

Integrated Design Capability

Integrated product/manufacturing/assembly design capability
- Inclusive in house design from beginning to final product.
- High customization ability
- Fast response to customer demands
- Continuous product innovation.
- Vast golden patents on hand.



Advanced Manufacturing Technology Capability

- Diversified progressive tooling/roll forming design/manufacture
- Diversified environmental coating/electric plating capability
- Highly automated assembly capability
  - — automated fool proof device
  - — operation environment safety compliance

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FURTURE GROWTH MOMENTUM – FOUR LARGE PRODUCT SECTORS APPLIED TO DIFFERENT TYPE OF INDUSTRIES

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Sales Channel Product	Total solutions that are applicable to various industries	New product New market New customer
Conventional Product	New user-friendly series products for kitchen and furniture application	New product Existing market Existing customer
Market Share Aimed Product	New integrated, full range development products for server applications.	New product Existing market Existing/new customer
Consumer Product	New products focusing on consumer electronic application.	New product New market Existing/new customer

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FINANCIAL PERFORMANCE – Q3 2011 TO Q3 2012

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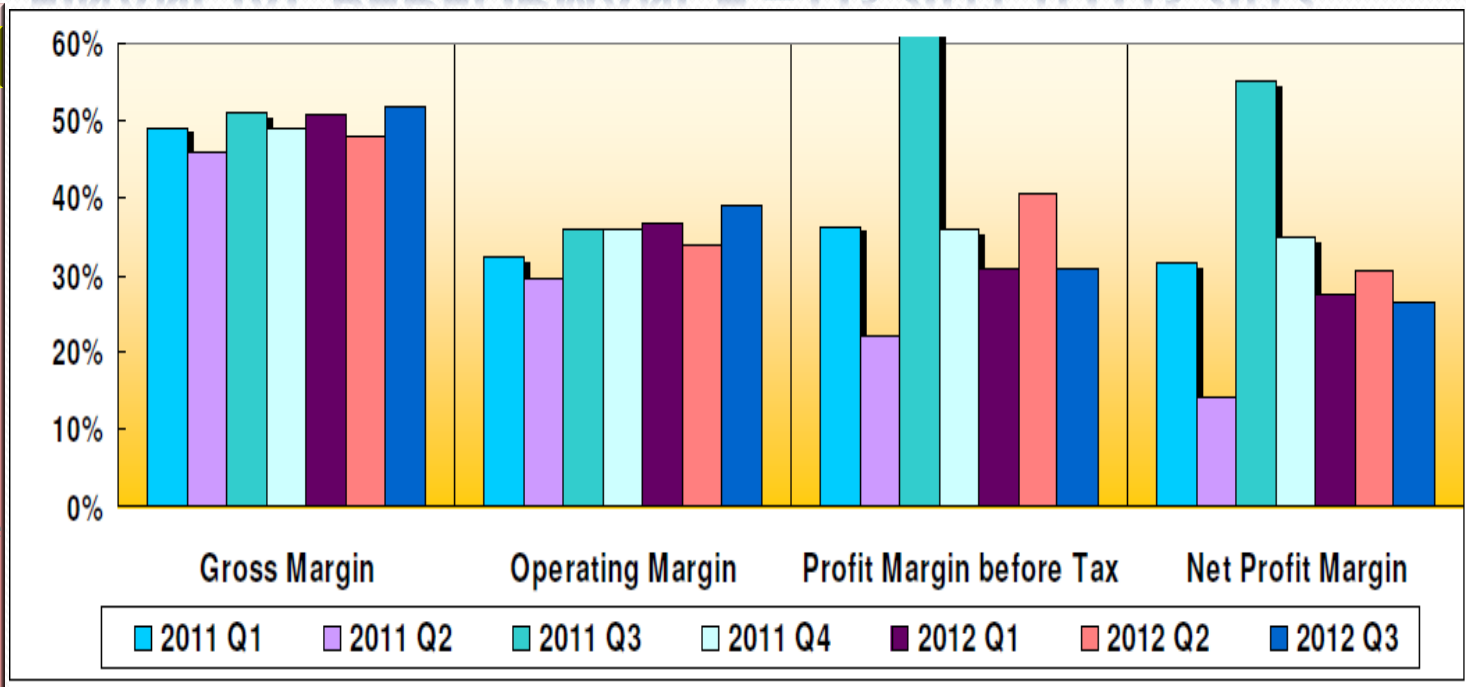

Profitability%	2011 Q1	2011 Q2	2011 Q3	2011 1-9	2011 Q4	2012 Q1	2012 Q2	2012 Q3	2012 1-9
Gross Margin	49.0%	45.9%	51.1%	48.7%	49.3%	50.5%	47.9%	51.7%	50.1%
Operating Margin	32.3%	29.4%	35.8%	32.6%	35.8%	36.5%	34.0%	38.8%	36.5%
Profit Margin before Tax	36.1%	22.3%	64.8%	41.5%	35.5%	30.8%	40.5%	30.7%	34.1%
Net Profit Margin	31.5%	14.2%	55.4%	34.0%	34.9%	27.6%	30.5%	26.5%	28.2%

FINANCIAL PERFORMANCE – GROWTH % YOY Q3 2011 TO Q3 2012

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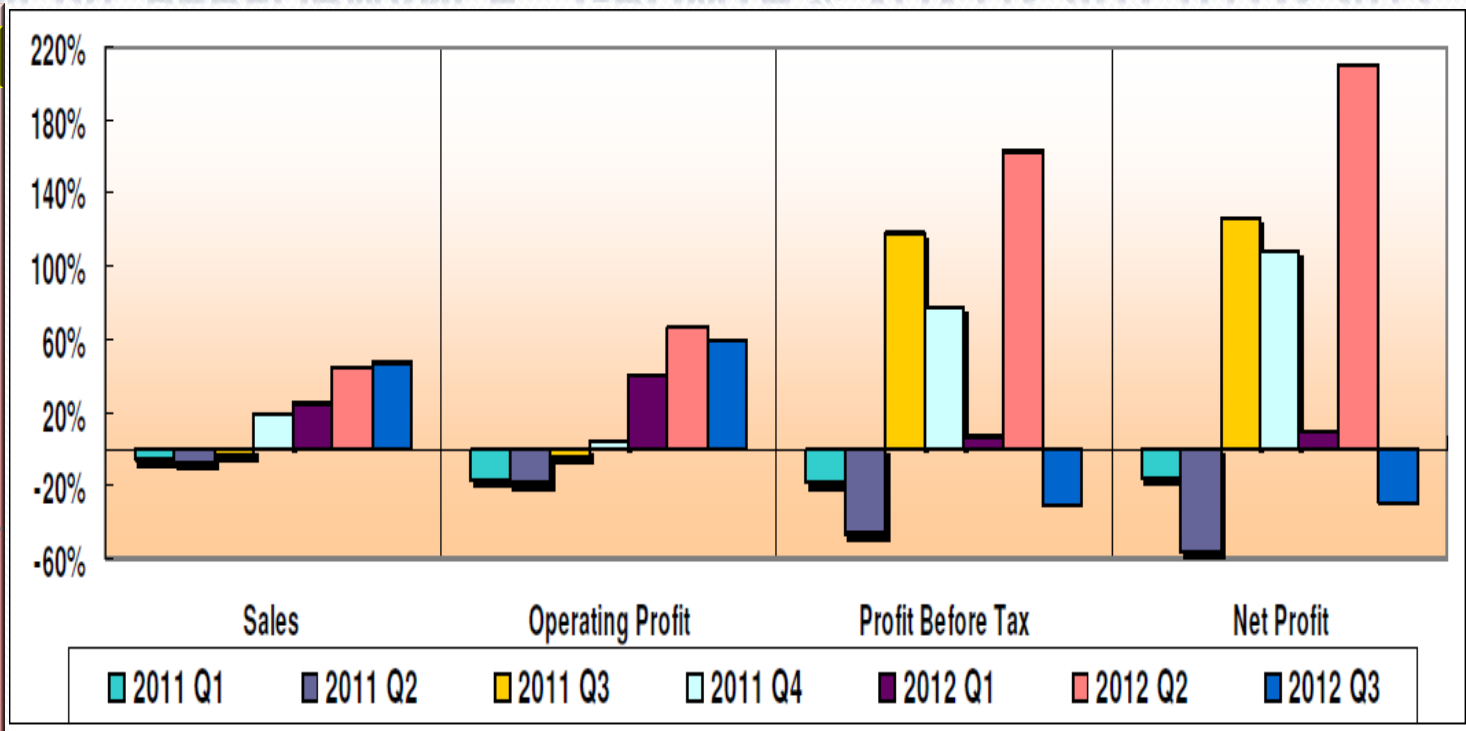

Growth% YoY	2011 Q1	2011 Q2	2011 Q3	2011 1-9	2011 Q4	2012 Q1	2012 Q2	2012 Q3	2012 1-9
Sale Turnover	-5.1%	-7.5%	3.0%	-3.3%	20.0%	24.7%	44.2%	46.7%	38.9%
Operating Profit	-17.1%	-17.9%	-3.7%	-12.7%	4.2%	40.9%	66.5%	59.3%	55.7%
Profit before Tax	-17.6%	-45.9%	118.0%	9.1%	77.4%	6.5%	162.6%	-30.5%	14.3%
Net Profit	-15.8%	-56.1%	125.7%	9.2%	108.9%	9.4%	210.8%	-29.8%	15.1%

FINANCIAL PERFORMANCE – EPS 2008 TO 2011

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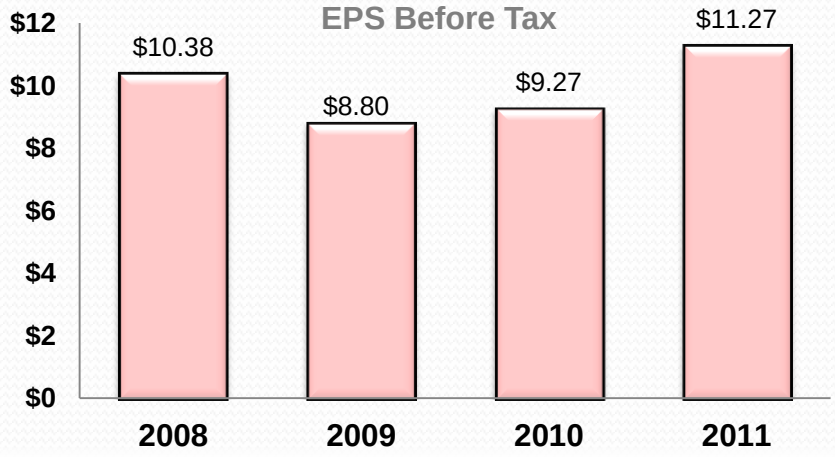
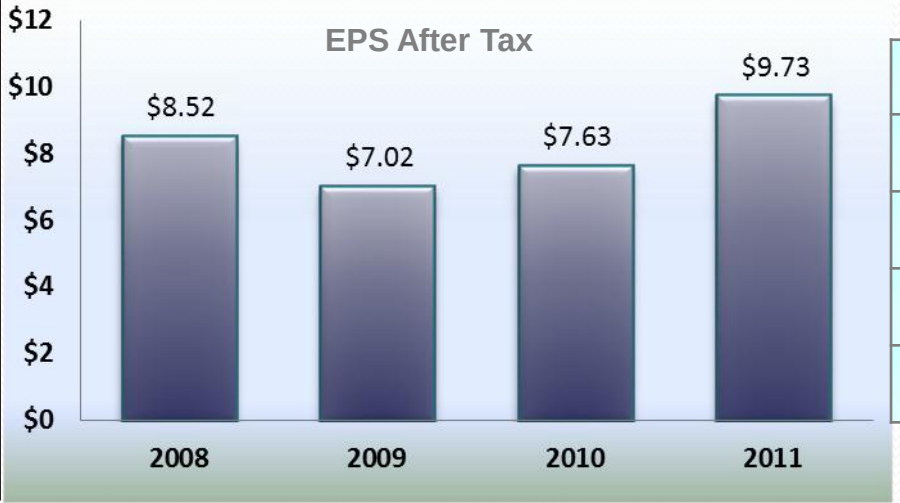
** EPS according to shares outstanding (92,307,000shares) **



	EPS Before Tax(NTD)
2008	10.38
2009	8.80
2010	9.27
2011	11.27

** EPS according to shares outstanding (92,307,000 shares)**



	EPS After Tax(NTD)
2008	8.52
2009	7.02
2010	7.63
2011	9.73

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FINANCIAL PERFORMANCE – EPS Q3 2011 – Q3 2012

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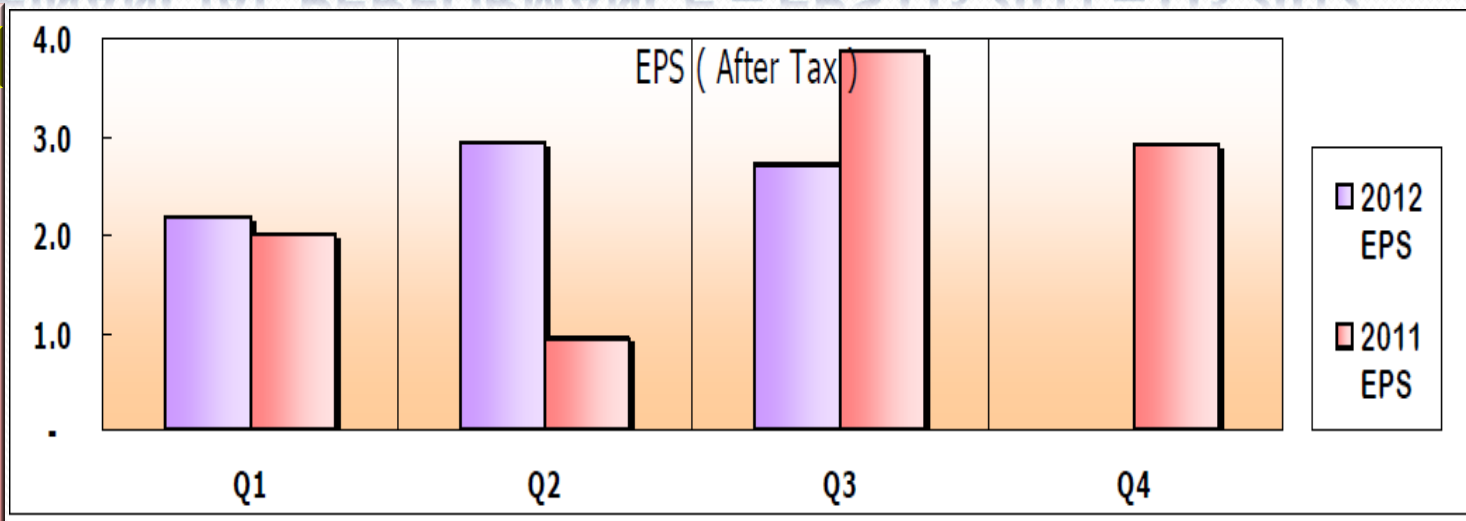

EPS before Tax (NT$)	Q1	Q2	1H	Q3	1-9	Q4	Jan-Dec
2012 EPS	2.43	3.91	6.34	3.14	9.48		
2011 EPS	2.28	1.49	3.77	4.52	8.29	2.98	11.27
EPS after Tax (NT$)							
2012 EPS	**2.18**	**2.94**	5.12	**2.71**	7.83		
2011 EPS	**1.99**	**0.94**	2.93	**3.88**	6.81	**2.92**	**9.73**
EPS after Tax (NT$)	(Employee bonus and director compensations not included)						
2012 EPS	2.31	3.04	5.35	2.87	8.22		
2011 EPS	2.12	1.04	3.16	4.00	7.16	3.07	10.23

PS:EPS (NT$) according to shares outstanding (92,307,000 shares)

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APPENDIX – CONSOLIDATED BALANCE SHEET

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(Unit:NT$1000)	2008	2009	2010	2011	Q1/11	1H/11	1-9/11	Q1/12	1H/12	1-9/12
Total Assets	4,126,081	5,198,753	5,400,666	5,847,422	5,545,246	5,633,688	5,541,811	5,392,756	6,146,432	6,034,334
Current Assets	2,732,580	3,570,759	3,745,014	4,163,068	3,891,858	3,965,359	3,860,590	3,729,095	4,476,840	4,370,482
Cash & ST Investment	1,842,103	2,658,232	2,856,905	3,104,880	3,010,108	3,055,061	2,924,721	2,639,905	3,257,888	3,037,915
Inventories	341,564	270,493	309,858	319,124	318,383	321,712	312,429	357,340	366,734	424,303
Accounts Receivable	485,082	562,424	504,030	686,261	506,821	531,021	580,498	651,492	786,989	830,340
Others	63,831	79,610	74,221	52,803	56,546	57,565	42,942	80,358	65,229	77,924
Other Assets	1,393,501	1,627,994	1,655,652	1,684,354	1,653,388	1,668,329	1,681,221	1,663,661	1,669,592	1,663,852
Net fixed Assets	1,384,091	1,617,565	1,643,342	1,665,915	1,639,924	1,649,526	1,661,765	1,640,473	1,646,919	1,639,612
Others	9,410	10,429	12,310	18,439	13,464	18,803	19,456	23,188	22,673	24,240
Total Liabilities	1,469,177	1,967,879	1,826,501	1,871,427	1,785,425	2,295,326	1,833,662	1,195,962	2,092,482	1,732,426
Current Liabilities	554,682	1,479,708	520,325	1,808,121	1,278,838	1,785,527	1,320,653	982,656	1,589,176	1,259,120
Accounts Payable	166,619	194,697	165,906	214,376	166,358	175,706	177,763	207,663	258,950	288,062
ST Convertible Bonds	0	872,617	0	1,280,914	808,596	814,447	820,298	464,054	467,357	470,661
ST Borrowings	50,000	75,000	0	0	0	0	50,000	0	90,000	90,000
Others	338,063	337,394	354,419	312,831	303,884	795,374	272,592	310,939	772,869	410,397
Long-term Liabilities	914,495	488,171	1,306,176	63,306	506,587	509,799	513,009	213,306	503,306	473,306
LT Debts	0	0	0	0	0	0	0	150,000	440,000	410,000
LT Convertible Bonds	865,528	435,337	1,250,663	0	451,074	454,286	457,496	0	0	0
Others	48,967	52,834	55,513	63,306	55,513	55,513	55,513	63,306	63,306	63,306
Shareholders' Equity	2,656,904	3,230,874	3,574,165	3,975,995	3,759,821	3,338,362	3,708,149	4,196,794	4,053,950	4,301,908
Paid-in Capital	785,041	871,386	921,202	921,613	921,202	921,202	921,202	923,219	923,219	923,219
Retained Earnings	1,735,711	2,070,137	2,292,053	2,683,561	2,475,611	2,056,293	2,413,560	2,884,367	2,740,391	2,991,312
Others	136,152	289,351	360,910	370,821	363,008	360,867	373,387	389,208	390,340	387,377

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APPENDIX – CONSOLIDATE FINANCIAL PERFORMANCE INCOME STATEMENT

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(Unit:NT$1000)	2008	2009	2010	2011	Q1 /11	Q2/11	Q3/11	1-9/11	Q4 /11	Q1 /12	Q2 /12	Q3/12	1-9 /12
Sales	2561,467	2174,573	2550,520	2617,467	583,350	617,031	644,498	1844,879	772,588	727,448	890,063	945,785	2563,296
Cost of Goods Sold	1323,164	1051,418	1223,605	1337,964	297,503	333,545	315,418	946,466	391,498	359,804	463,318	456,801	1279,923
Gross Profit	1238,303	1123,155	1326,915	1279,503	285,847	283,486	329,080	898,413	381,090	367,644	426,745	488,984	1283,373
Operation expenses	322,594	348,621	373,667	402,254	97,380	101,874	98,649	297,903	104,351	102,007	124,386	121,916	348,309
Operating Profit	915,709	774,534	953,248	877,249	188,467	181,612	230,431	600,510	276,739	265,637	302,359	367,068	935,064
Net Interest	6,825	-15,591	-25,824	-22,971	-6,495	-6,491	-5,175	-18,161	-4,810	-1,227	-1,295	-3,241	-5,763
Interest Income	31,884	10,922	10,139	13,479	2,512	2,572	3,978	9,062	4,417	4,240	3,420	2,183	9,843
Interest Expense	25,059	26,513	35,963	36,450	9,007	9,063	9,153	27,223	9,227	5,467	4,715	5,424	15,606
Net Exchange Income/(Loss)	10,856	-14,211	-124,597	117,689	16,555	-49,265	172,444	139,734	-22,045	-84,665	46,000	-70,960	-109,625
Net financial debt/assets appraisal Income/(Loss)	-5,843	15,059	-8,050	14,845	-2,550	-1,045	6,230	2,635	12,210	18,040	-5,070	-9,660	3,310
Net other Non-op. Income/(Loss)	30,203	52,470	61,155	53,124	14,523	12,610	13,440	40,573	12,551	26,295	18,818	6,862	51,975
Pretax Income	957,750	812,261	855,932	1039,936	210,500	137,421	417,370	765,291	274,645	224,080	360,812	290,069	874,961
Income Taxes	171,615	163,819	151,482	141,767	26,942	50,078	60,103	137,123	4,644	23,274	89,339	39,148	151,761
Net Profit	786,135	648,442	704,450	898,169	183,558	87,343	357,267	628,168	270,001	200,806	271,473	250,921	723,200
EPS (NT$) before tax	10.38	8.80	9.27	11.27	2.28	1.49	4.52	8.29	2.98	2.43	3.91	3.14	9.48
EPS (NT$) after tax	8.52	7.02	7.63	9.73	1.99	0.94	3.88	6.81	2.92	2.18	2.94	2.71	7.83

PS: EPS (NT$) according to shares outstanding (92,307,000 shares)

employee bonuses and director compensations	2008	2009	2010	2011	Q1/11	Q2/11	Q3/11	1-9/11	Q4/11	Q1/12	Q2/12	Q3/12	1-9/12
Pretax Income (UNIT:NT$1000)	80,802	53,000	41,416	53,000	13,250	13,250	13,250	39,750	13,250	13,250	13,250	16,638	43,138
Net Profit (UNIT:NT$1000)	66,323	42,311	34,086	45,775	11,554	9,080	11,994	32,628	13,147	11,874	9,524	14,258	35,656

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APPENDIX – CONSOLIDATED CASH FLOW

Ticker Symbol: 2059

Company Profile

The Plant / Facility

Current Business Overview

2011/2012 Consolidated Sales Breakdown

Product Markets— Electronics Application

Product Markets— Global Server Market Share

Product Markets— Slide, Hinge, Kitchen

Product Markets— Kitchen Market Share

Entry Barrier

Mechanical IP Support

Core Competencies

Future Growth Momentum

Financial Performance

Appendix

(Unit:NT$1000)	2008	2009	2010	2011	Q1 /11	1H /11	1-9 /11	Q1 /12	1H /12	1-9 /12
Operating Cash Flow	1027,512	800,704	914,216	904,744	176,041	268,767	628,179	214,294	453,235	723,117
Net Profit	786,135	648,442	704,450	898,169	183,558	270,901	628,168	200,806	472,279	723,200
Depreciation & Amortization	99,837	102,497	143,152	166,568	39,197	80,269	122,022	38,757	76,713	117,384
Change in Non-cash Working Capital	141,540	49,765	66,614	-159,993	-46,714	-82,403	-122,011	-25,269	-95,757	-117,467
Others	0	0	0	0	0	0	0	0	0	0
Investment Cash Flow	-531,197	-273,267	-198,444	-152,201	-23,290	-70,478	-105,756	-29,957	-31,107	-75,900
Net CAPEX	-531,156	-278,327	-198,387	-143,044	-21,713	-63,048	-96,790	-27,229	-27,824	-70,466
Change in Other Assets	-41	5,060	-57	-9,157	-1,577	-7,430	-8,966	-2,728	-3,283	-5,434
Free Cash Flow	496,315	527,437	715,772	752,543	152,751	198,289	522,423	184,337	422,128	647,217
Financing Cash Flow	-294,379	289,448	-513,667	-506,661	0	0	-456,661	-648,600	-268,600	-714,049
Change in Share Capital	-321,330	-235,512	-438,667	-506,661	0	0	-506,661	0	0	-415,449
Net Change in Debt	50,000	25,000	-75,000	0	0	0	50,000	150,000	530,000	500,000
Change in Other LT Liab.	-23,049	500,000	0	0	0	0	0	-798,600	-798,600	-798,600
Others	0	-40	0	0	0	0	0	0	0	0
Others	5,779	-756	-3,432	2,093	452	-133	2,054	-712	-520	-133
Net Cash Flow	207,715	816,129	198,673	247,975	153,203	198,156	67,816	-464,975	153,008	-66,965

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APPENDIX – CONSOLIDATED KEY RATIOS

Ticker Symbol: 2059

Company Profile

The Plant / Facility

Current Business Overview

2011/2012 Consolidated Sales Breakdown

Product Markets—Electronics Application

Product Markets—Global Server Market Share

Product Markets—Slide, Hinge, Kitchen

Product Markets—Kitchen Market Share

Entry Barrier

Mechanical IP Support

Core Competencies

Future Growth Momentum

Financial Performance

Appendix

ITEM / YEAR	2008	2009	2010	2011	Q1 /11	1H /11	1-9 /11	Q1 /12	1H /12	1-9 /12
Growth (%YoY)										
Sales	28.0	-15.1	17.3	2.6	-5.1	-6.3	-3.3	24.7	34.7	38.9
OP	26.0	-15.4	23.1	-8.0	-17.1	-17.5	-12.7	40.9	53.5	55.7
EPS (after tax)	24.2	-17.5	8.6	27.5	-16.0	-35.1	-9.3	9.5	74.1	15.0
Profitability (%)										
Gross Margin	48.3	51.6	52.0	48.9	49.0	47.4	48.7	50.5	49.1	50.1
Operating Margin	35.7	35.6	37.4	33.5	32.3	30.8	32.6	36.5	35.1	36.5
Net Profit Margin	30.7	29.8	27.6	34.3	31.5	22.6	34.0	27.6	29.2	28.2
ROA	20.3	13.9	13.3	16.0	13.4	9.8	15.3	14.3	15.8	16.2
ROE	32.5	22.0	20.7	23.8	20.0	15.7	23.0	19.7	23.5	23.3
Stability										
Gross Debt/Equity (%)	37.8	47.0	36.8	33.9	34.4	36.7	36.5	15.0	24.8	23.5
Net Debt/Equity (%)	Net cash	Net cash	Net cash	Net cash	Net cash	Net cash	Net cash	Net cash	Net cash	Net cash
Current Ratio (X)	4.9	2.4	7.2	2.3	3.0	2.2	2.9	3.8	2.8	3.5
Quick Ratio (X)	4.2	2.2	6.5	2.1	2.8	2.0	2.7	3.4	2.6	3.1
Per Share Data (NT$)										
EPS (after tax)	8.52	7.02	7.63	9.73	1.99	2.93	6.81	2.18	5.12	7.83
BVPS	28.78	35.00	38.72	43.07	40.73	36.17	40.17	45.47	43.92	46.60
DPS	3.00	5.00	5.50	4.50						

PS:EPS & BVPS (NT$) according to Shares outstanding (92,307,000 shares)

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THANK YOU!