

## Urgent Update – Escalation of Global Supply Constraints and Lead Times

Dear Valued Partner,

Following our previous communications regarding global supply-chain pressures, pricing adjustments, and recent product line evolution updates, we are writing to provide a further and more urgent update on rapidly deteriorating market conditions affecting hardware availability across the ISAAC product portfolio.

### Global Market Context – Escalation

Since our last update, supply-chain constraints across the technology sector have significantly intensified beyond prior expectations.

The continued expansion of AI infrastructure, combined with sustained demand for critical components such as memory, storage, and server platforms, has now created a compounding supply disruption affecting both availability and production timelines at a global scale. These pressures are being further exacerbated by reduced component allocation, longer manufacturing cycles, and increased competition for limited supply.

While these conditions remain outside the control of individual manufacturers and solution providers, their speed and magnitude have accelerated sharply in recent weeks, requiring immediate and transparent communication.

### Impact on Lead Times

Based on the most recent guidance from our supply-chain partners, we must advise that lead times have materially extended beyond previously communicated ranges.

- Revised typical lead times are now estimated at approximately 20 to 22 weeks for all ISAAC Hosting Platform systems
- Availability for certain configurations may extend beyond this range depending on component allocation and system requirements
- These timelines are subject to continued volatility and may evolve further as conditions develop

This represents a substantial shift from the previously communicated ranges of 12–16 weeks and reflects the rapid deterioration of supply conditions across the industry.

### Product Availability Position

We would like to highlight the following important distinction within the ISAAC product portfolio:

- **ISAAC Embedded Platform (ISAAC Foundation):** Systems currently remain in stock and available for immediate shipment, based on existing inventory levels
- **ISAAC Hosting Platform and related hardware systems:** Continue to be directly impacted by extended lead times and component constraints

This differentiation remains consistent with our prior efforts to manage inventory strategically and maintain availability where feasible.

### Pricing Outlook

- Additional pricing adjustments may become necessary in the near term
- Pricing volatility is expected to remain elevated as supply conditions fluctuate

In parallel with these availability constraints, ongoing cost escalation at the component level continues to place upward pressure on pricing.

Despite continued efforts to absorb increases where possible, current market conditions indicate: We will continue to communicate any changes as early and transparently as possible.

### What We Recommend – Immediate Action

Given the current environment, we strongly recommend that partners take the following actions:

- Engage immediately with Smart Monkeys teams on all upcoming or active opportunities
- Advance procurement timelines wherever possible to secure production allocation
- Revalidate project schedules and client expectations to reflect extended lead times
- Consider available in-stock alternatives, including ISAAC Foundation systems where applicable

Early planning and proactive coordination are now critical to maintaining project viability.

### Our Commitment

We recognize that the current situation presents significant challenges to planning, budgeting, and client commitments.

- Maintaining transparent and frequent communication
- Working collaboratively to identify viable alternatives and solutions
- Supporting project-specific discussions and commercial flexibility where feasible
- Actively managing sourcing strategies and supplier coordination

Our objective remains to provide clarity and continuity in an exceptionally volatile environment, while preserving the long-term reliability of the ISAAC platform ecosystem. We sincerely appreciate your continued partnership and understanding as we navigate this rapidly evolving situation together.

For any active opportunity or project requiring immediate review, we strongly encourage you to contact your Smart Monkeys sales representative directly.

Sincerely,

**The ISAAC Team**