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The 1-Minute Brief

MediaTek CY Q3'25 Earnings

Announced on 31, Oct'25

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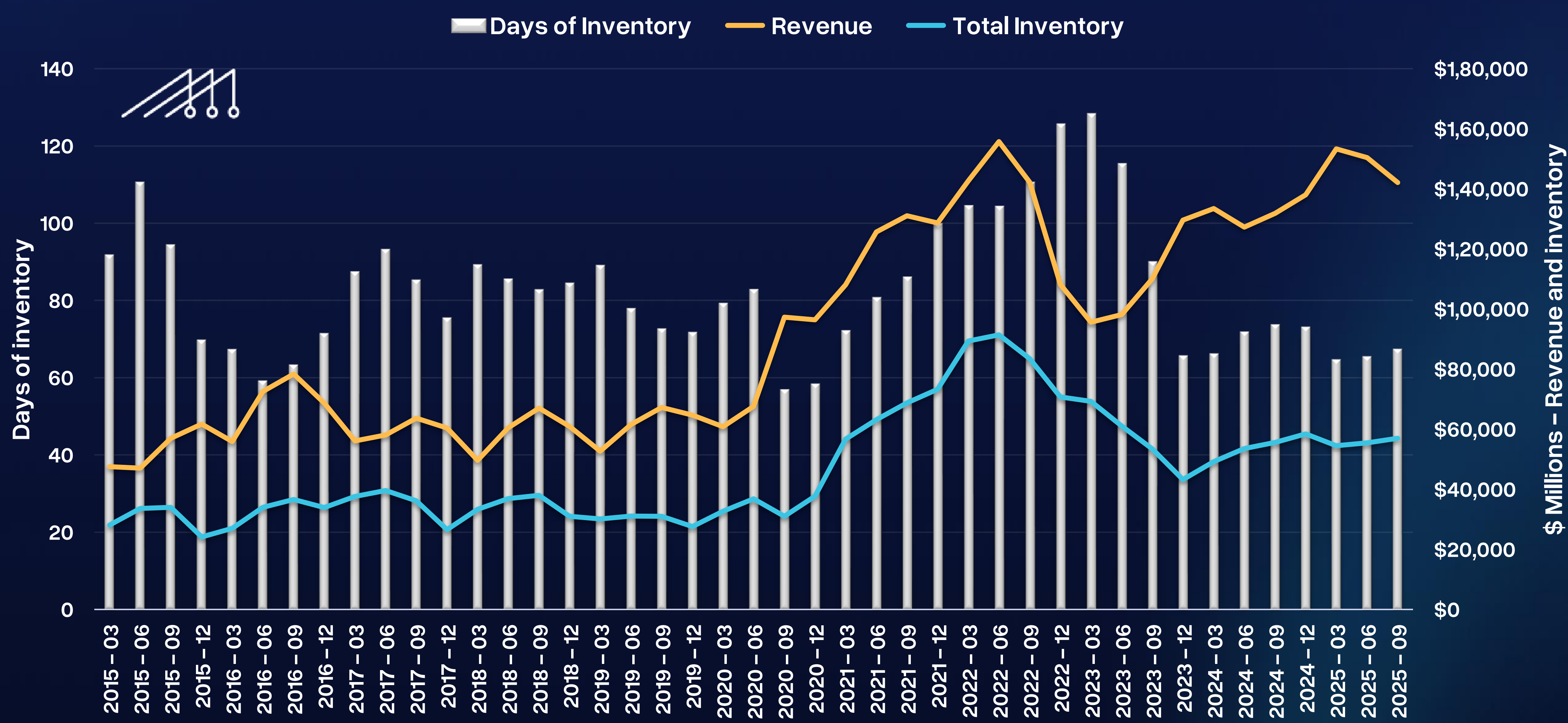
Key Takeaways

- CY Q3'25 revenue was NT$142B, up 7.8% YoY, driven by market share gains in AI flagship smartphone and AI tablet, and down 5.5% QoQ, due to some customers pull-ins into H1'25
- Gross margin declined YoY & QoQ, driven by prior one-time gains in Q2 (1.9% points) and product mix shifts
- Making strides in automotive and innovation, with a new 2nm chip launch planned for 2026



Gross Margin Trend

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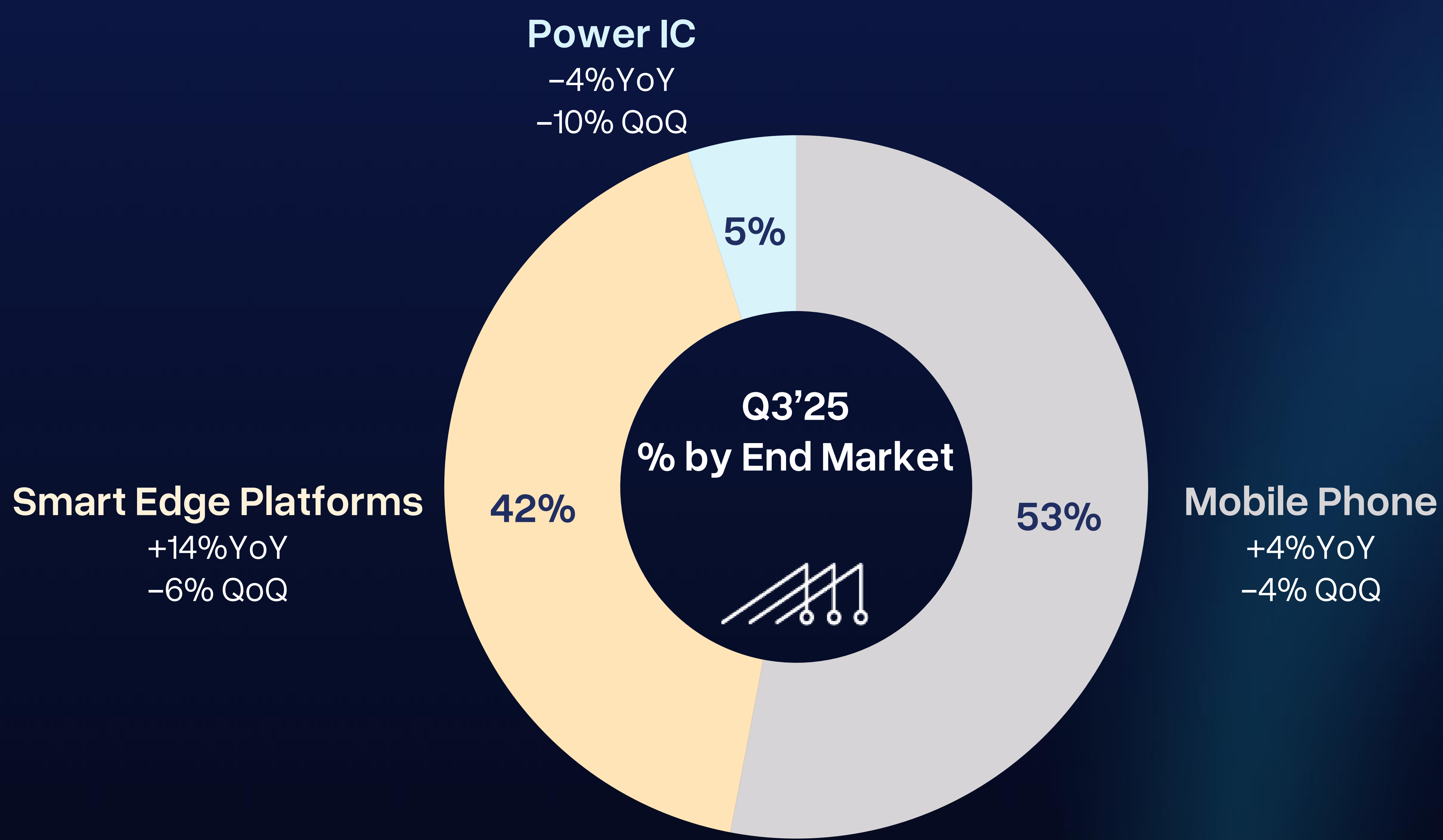
Performance by Segment

- **Mobile Phones**: Record demand for Dimensity 9500 driven flagship launches in China, with global expansion underway
- **Smart Edge Platforms**: YoY growth driven by tablets with AI & connectivity and global share gains; sequential decline was mainly due to the certain demand being moved forward to the first half of the year
- **Power ICs**: Saw a 10% sequential decline amid seasonal downturn



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Outlook

- **Q4'25 quarter midpoint guidance (NT$):**
  +6% YoY (vs. Q4'24) and +3% QoQ (vs. Q3'25)
- In Q4, sequential gains in flagship smartphone GB10 and auto are expected to offset seasonal weakness in consumer electronics

Segment	Q4'25 QoQ outlook	Highlights
Mobile Phones	↑ **Strong growth** expected due to Dimensity 9500 ramp	Flagship smartphone revenue expected to be >US$3B in 2025 (+40% YoY)
Smart Edge Platforms	↓ **Decline** seasonally	Despite seasonal softness, auto revenue will more than double YoY in Q4 and continue rising into 2026
Power ICs	↓ **Decline** seasonally	–

Long-Term Growth:

- Key growth engines including flagship SoC, automotive, computing and data centers will continue to drive sustained long-term growth
- MediaTek's first ASIC project is on track, with revenue set to hit US$1B by 2026 and scale further through 2027, with more complex project contributions from 2028

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