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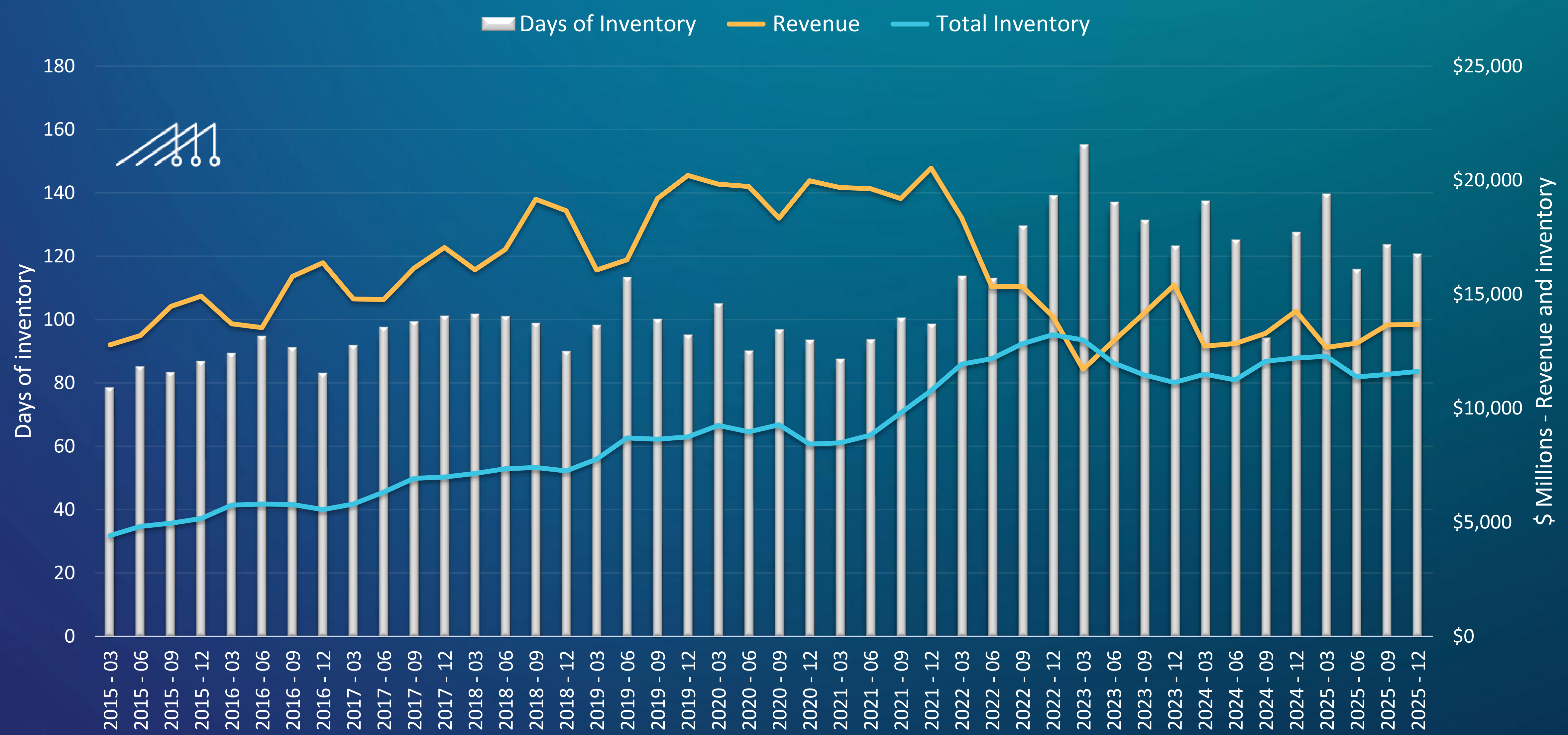
The 1- Minute Brief

Intel Q4’25 & FY 2025 Earnings Summary

Announced on 22, Jan’26

Key Takeaways

- In 2025, Intel's full-year revenue remained flat YoY, as the company navigated restructuring and financial pressures
- Q4'25 revenue came in above guidance at $13.7B, though it declined 4% YoY due to supply constraints
- Gross margin is pressurized by product mix and early Intel 18A ramp costs
- Launched Ultra Series 3 processor family in Q4, the first AI PC platform built on Intel 18A process technology, designed & manufactured in U.S.



Gross Margin Trend

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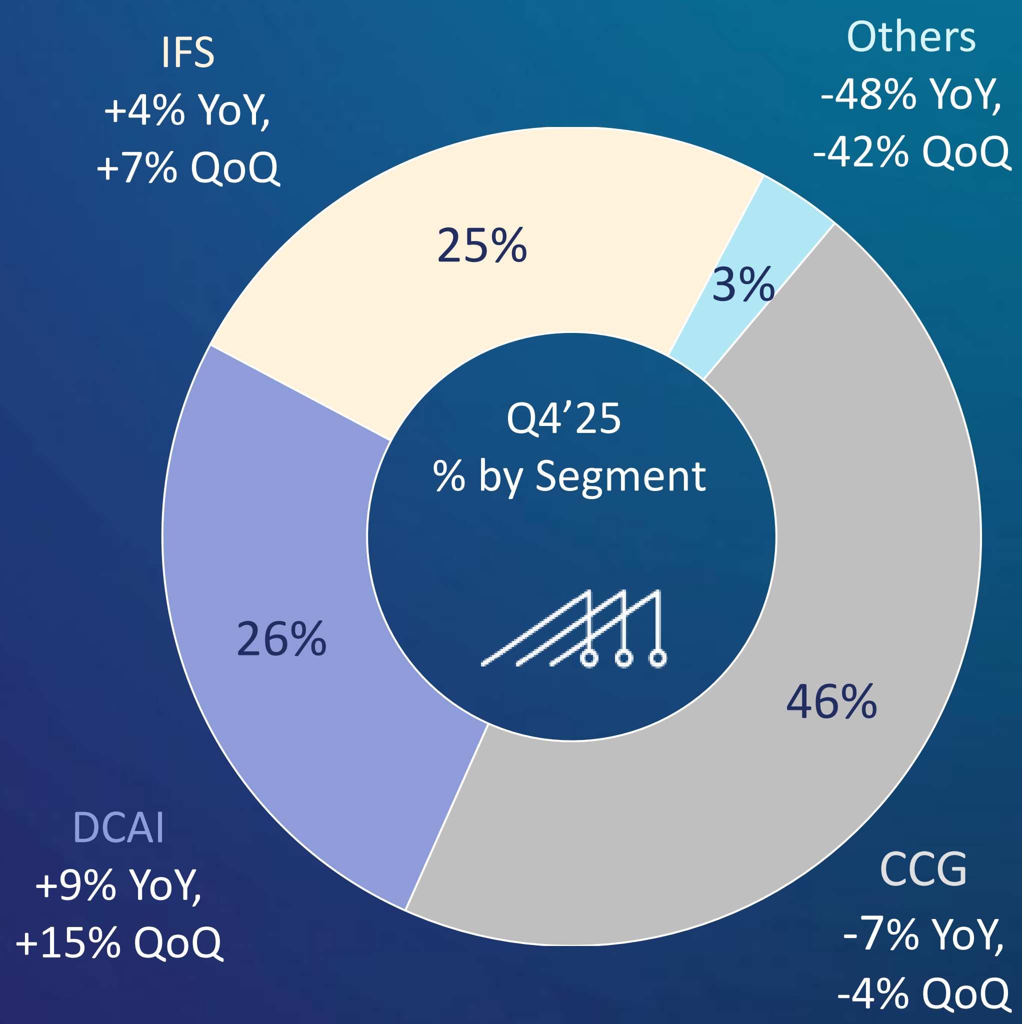
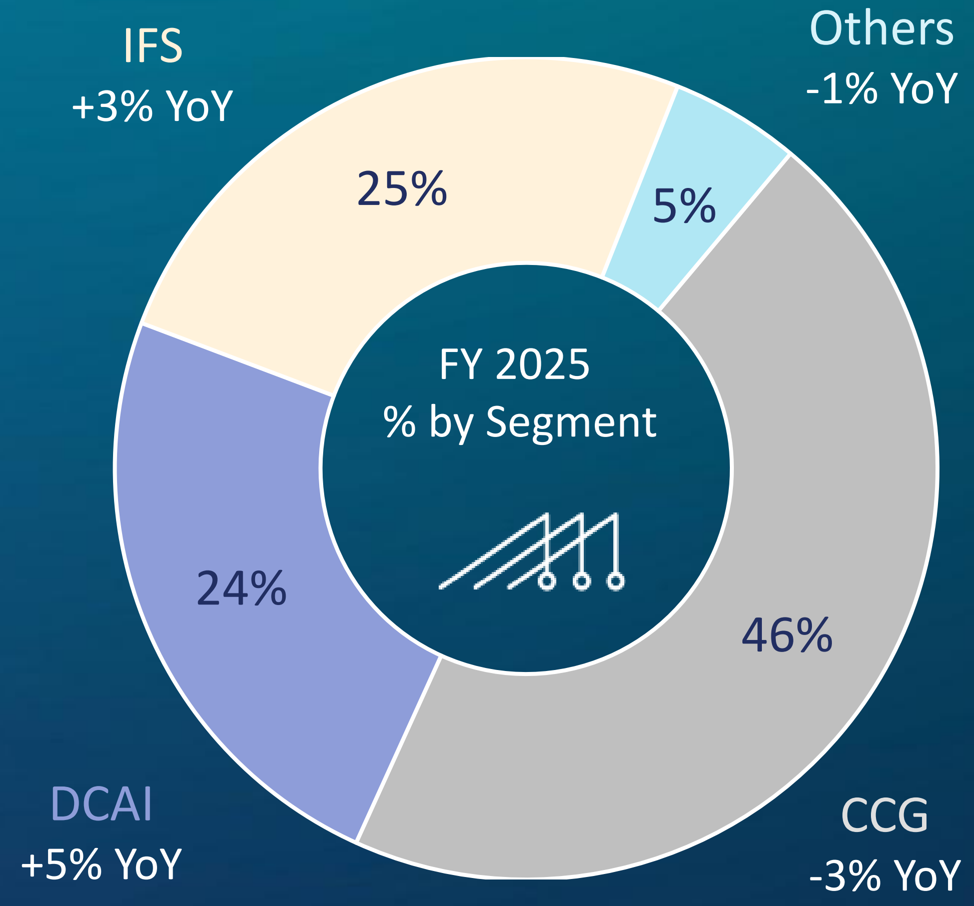
FY 2025 Performance by Segment

- CCG: Core Ultra Series 3 launch & Hybrid-AI momentum strengthens Intel's client roadmap
- DCAI: Strong demand for traditional server CPUs alongside AI workloads, with Granite Rapids, Sapphire Rapids, and Emerald Rapids driving growth
  - Working closely with NVIDIA on Xeon CPUs integrated with NVLink for AI host nodes
- IFS: Launched products on 18A, the most advanced US node, with external wafer and packaging progress
- Others: Mobileye delivered 15% revenue growth, while Altera's Q3 deconsolidation positions it for long-term value creation





Client Computing Group (CCG) | Data Center and AI (DCAI) | Intel Foundry Services (IFS) | Others (Mobileye, IMS)

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Outlook

- Q1’26 quarter midpoint guidance:
  -4% YoY (vs. Q1’25) and -11% QoQ (vs. Q4’25)
- Q1’26 is the trough on supply constraints, with fab output driving recovery from Q2’26 onward
- Gross Margin is expected to be down sequentially due to lower revenue, increased 18A volumes, and product mix

Segment	Q1’26 Outlook (QoQ)	2026 outlook
Client Computing Group (CCG)	Significant decline (seasonal weakness)	Recovery expected (positive momentum from Core Ultra Series 3)
Data centre & AI (DCAI)	Decline (relatively more resilient than CCG)	Strong growth (robust server demand)
Intel Foundry	Up double-digits (higher EUV wafer mix and Intel 18A pricing)	Strong growth (driven by 18A volumes, EUV shift, and better utilization)
Others (Excl. Altera)	-	Gradual improvement (supply recovery and demand stabilization)

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