



Q1 FY25 (Three months ended June 30th, 2025) Financial Briefing

2025年度(2026年3月期) 第1四半期決算説明会

July 29th, 2025 Advantest Corporation
2025年7月29日 株式会社アドバンテスト

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Summary / サマリー

- | | |
|--|---|
| <ul style="list-style-type: none">• Posted highest-ever quarterly sales / operating income / net income in Q1 FY25• Record breaking results reflect the sustained strength of AI-related demand and demonstrate our ability to scale supply capabilities• Raised the full-year guidance for FY25 following stronger-than-expected Q1 results, while expecting a temporary digestion period in 2H of FY25 due to the timing of next-generation device transitions; growth is expected to reaccelerate in FY26 | <ul style="list-style-type: none">• FY25 Q1は、四半期として過去最高の売上高、営業利益、当期利益を計上• 過去最高を更新したことは、AI関連需要の変わらぬ強さを反映していると同時に、当社の製品供給力の高さを実証• Q1実績の上振れを反映し、FY25の通期予想を上方修正。下期は次世代デバイスへの移行タイミングによる一時的な消化期間になると見込む。FY26にテスト需要再加速を見込む |
|--|---|

○ Summary

- Good morning and good afternoon, everyone. Thank you for joining our Financial Briefing for the first quarter of FY2025.
- We delivered an outstanding start to the fiscal year, posting highest-ever quarterly sales, operating income, and net income. Our first quarter performance underscores the sustained strength of AI-related demand and is a testament to our ability and commitment to scale supply capabilities. This result could not have been achieved without the dedication of our production partners and suppliers. I want to extend my sincere appreciation to all of them for their continued support and collaboration.
- We also achieved a notable expansion in both gross and operating profit margins. This performance was made possible by a unique alignment of numerous factors: economies of scale driven by higher sales—including pull-ins, a favorable product mix, disciplined cost management, absence of one-off losses, and the fruits of prior investments, particularly in capacity expansion.
- Looking ahead, we are raising our full-year guidance to reflect the stronger-than-expected performance in the first quarter. I will give details on this later in the presentation. While we anticipate a temporary digestion period in the latter half of the year, we expect growth to reaccelerate in FY2026. This lumpiness is largely driven by the timing of next-generation device transitions. Since customer demand does not flow evenly throughout the year and can shift abruptly, we have been strengthening our operational agility and supply chain resilience to better respond to these fluctuations.
- As we move forward, the central thesis we laid out in the Third Mid-Term Plan of complexity-driven growth remains firmly on track and is expected to unfold for the remainder of the Mid-Term Plan period.
- With that, let me turn the call over to Takada san to provide details on our first quarter results.

Financial Results for Q1 FY25

2025年度第1四半期決算報告

Hisako Takada Senior Executive Officer, CFO
高田 寿子 経営執行役員 CFO

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Q1 FY25 Summary of Results / 四半期業績推移

(JPY B / 10億円)	FY24					FY25			
	Q1	Q2	Q3	Q4	Q1	QoQ / 前四半期比		YoY / 前年同期比	
						Change 増減額	(%)	Change 増減額	(%)
Sales / 売上高	138.7	190.5	218.2	232.3	263.8	+31.4	+13.5%	+125.1	+90.1%
Gross Profit / 売上総利益	76.9	110.1	118.9	139.2	171.6	+32.4	+23.3%	+94.7	+123.2%
Gross Margin / 売上総利益率	55.4%	57.8%	54.5%	59.9%	65.1%	+5.2pts		+9.7pts	
Operating Income / 営業利益	31.3	63.6	69.2	64.1	124.0	+59.9	+93.6%	+92.6	+295.7%
Operating Margin / 営業利益率	22.6%	33.4%	31.8%	27.6%	47.0%	+19.4pts		+24.4 pts	
Income Before Tax / 税引前利益	31.9	60.7	70.6	61.6	121.4	+59.8	+97.1%	+89.4	+280.1%
Net Income / 当期利益	23.9	45.4	51.9	40.0	90.2	+50.2	+125.6%	+66.3	+277.7%
Net Income Margin / 当期利益率	17.2%	23.9%	23.8%	17.2%	34.2%	+17.0 pts		+17.0 pts	
Exchange Rate (JPY) 為替レート (円)	1 US\$ 1米ドル	153	154	149	154	JPY 8 Appreciation 8円 円高		JPY 7 Appreciation 7円 円高	
	1 Euro 1ユーロ	165	168	162	160	JPY 2 Depreciation 2円 円安		JPY 3 Appreciation 3円 円高	
Dividend Per Share (JPY) 1株当たり配当額 (円)	-	19.00	-	20.00	-				

○ Q1 FY2025 Summary of Results

- In the first quarter, we achieved our highest-ever sales and profit on a quarterly basis.
- Continuing from the previous fiscal year, amid growing customer demand for AI-related product deliveries, we worked to expand the procurement of parts and product supply capabilities in order to meet delivery timelines to the greatest extent possible and successfully carried out timely product deliveries.
- Despite the yen appreciating against the US dollar compared to the previous quarter, we achieved record-high quarterly results, driven by a significant increase in SoC tester shipments.

Overview of Changes in Reporting Segment / 報告セグメントの変更概要

In efforts to provide comprehensive test solutions, Advantest has decided to reclassify the sources of revenue in management approach perspectives and to change reportable segments

包括的なテスト・ソリューションの提供を目指す中で、マネジメント・アプローチの視点により当社グループにおける収益の源泉を再分類し、報告セグメントを変更

Original Reporting Segment / 変更前		New Reporting Segment / 変更後	
Reporting Segments 報告セグメント	Business / Products 事業 / 製品	Reporting Segments 報告セグメント	Business / Products 事業 / 製品
Semiconductor & Component Test System Business 半導体・部品テストシステム事業	SoC Testers SoCテスト	Test System Business テストシステム事業	SoC Testers SoCテスト
	Memory Testers メモリ・テスト		Memory Testers メモリ・テスト
Mechatronics System Business メカトロニクス関連事業	Test Handlers テスト・ハンドラ		Other Systems その他システム
	Device Interfaces デバイス・インタフェース		Test Handlers テスト・ハンドラ
	Nano-technology Products ナノテクノロジー製品		Device Interfaces デバイス・インタフェース
Services, Support & Others サービス他事業	Support Services, etc. サポート・サービス等	Services & Others サービス他事業	System Level Test Systems(*) システムレベルテスト・システム(*)
	Others その他		Support Services サポート・サービス
	System Level Test Systems(*) システムレベルテスト		Others その他
	Consumables, others 消耗品、その他		
			Nano-technology Products ナノテクノロジー製品

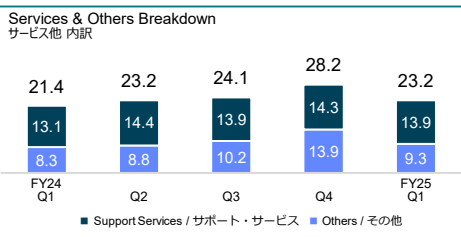
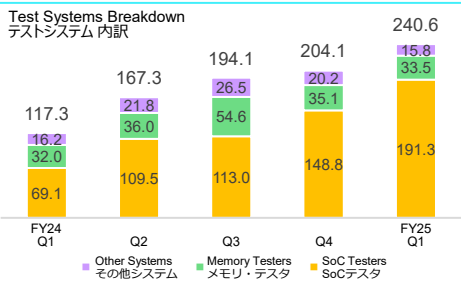
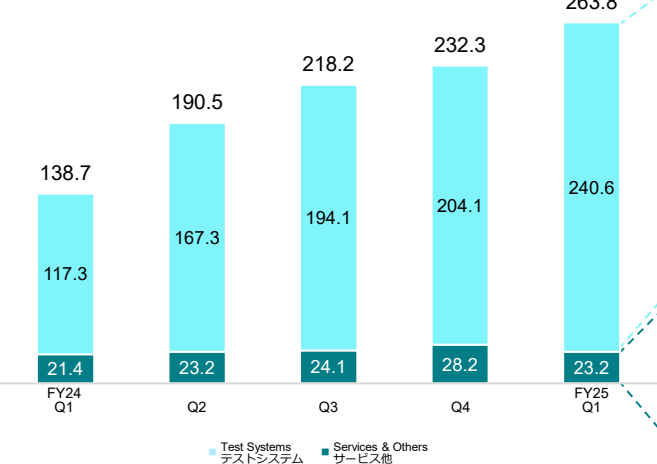
(*) Products related to the system level test business acquired from Astronics Corporation in CY2019 / 2019年にAstronics Corporationより譲受したシステムレベルテスト事業に関連する製品

○ Overview of Changes in Reporting Segments

- Before going into the details of our performance, I would first like to explain the changes made to our reportable segments.
- In efforts to provide comprehensive test solutions that include not only test equipment but also peripherals, Advantest revised its reportable segments, starting from FY2025, based on a management approach perspective.
- Specifically, the previous three segments have reorganized into two segments: “Test Systems Business” and “Services & Others”.
- The “Test Systems Business” segment includes SoC testers and memory testers, as well as ‘Other Systems’ - products that are highly correlated with tester demand, such as test handlers and device interfaces. In addition, products related to the system-level test business acquired from Astronics Corporation in the U.S. in CY2019 are also included in ‘Other Systems’.
- “Services & Others” segment includes support services, nano-technology products, and consumables businesses such as test sockets and interface boards for testing, which were acquired in the past through acquisitions.
- Now, let me move on to the details of our financial performance.

Quarterly Sales by Segment / 四半期売上高 事業セグメント別

(JPY B / 10億円)



Note: Intersegment transactions have been eliminated from total / 合計にはセグメント間の内部取引の消去分が含まれます

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○ Q1 FY2025 Quarterly Sales by Segment

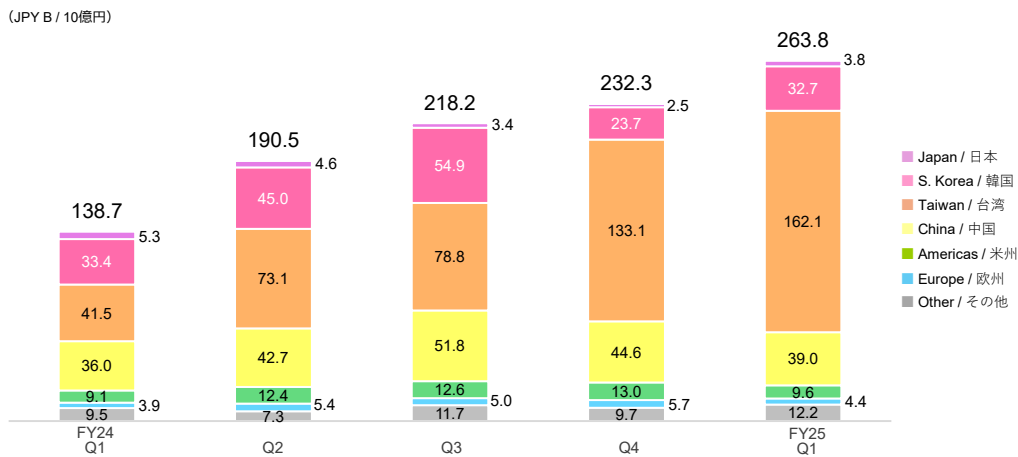
○ Test System Business

- SoC tester sales were JPY 191.3 billion, an increase of JPY 42.4 billion QoQ. We were able to increase product deliveries compared to the previous quarter, mainly for HPC (High Performance Computing)/AI-related semiconductors which continue to grow in complexity and performance.
- Memory tester sales were JPY 33.5 billion, maintaining a high level comparable to the previous quarter, mainly driven by high-performance DRAM.

○ Service & Others

- While sales for support services maintained a steady level, sales for nano-technology products declined compared to the previous quarter.

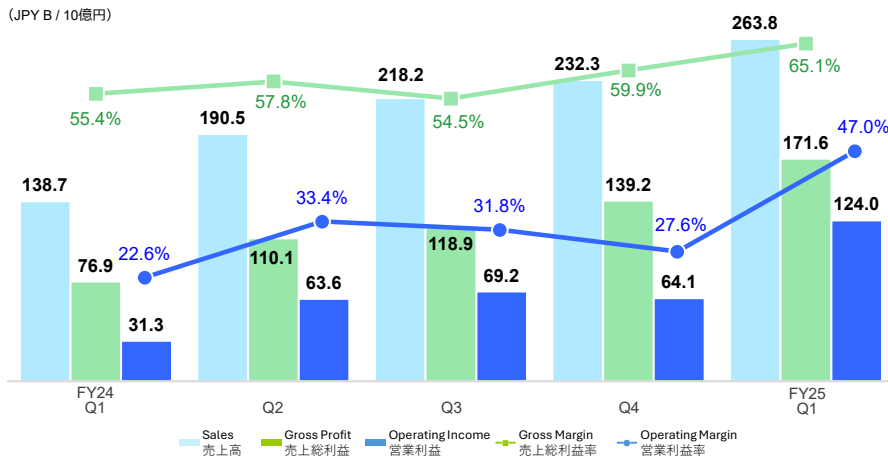
Quarterly Sales by Region (Ship to Region) / 四半期売上高 地域(出荷先)別



○ Q1 FY2025 Sales by Region (Ship to Region)

- Taiwan**
 Sales increased significantly QoQ, primarily driven by SoC testers. This is mainly due to higher quality assurance requirements for high-end semiconductors at several U.S. fabless companies. This resulted in an increase in sales to the related foundries and OSATs.
- South Korea**
 Sales of memory testers and related device interfaces increased.

Sales, Gross Profit, Operating Income / 売上高、売上総利益、営業利益



Note: Operating income includes an impairment loss of approximately JPY 21.4 billion on goodwill and intangible assets in Q4 FY24, and a gain of approximately JPY 2.5 billion from the partial divestiture of a business in Q1 FY25 / FY24 Q4の営業利益にはのれんおよび無形資産の減損損失約214億円、FY25 Q1の営業利益には事業の一部譲渡による譲渡益約25億円を含みます

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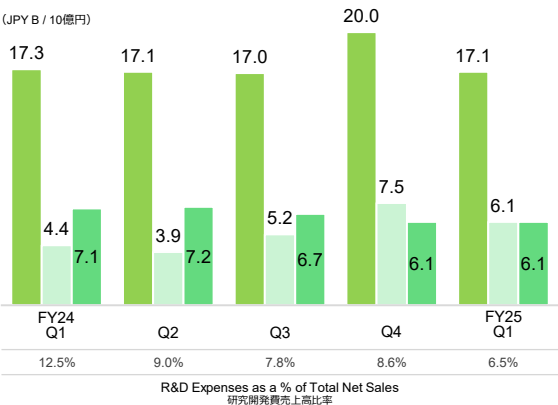
○ Q1 FY2025 Sales, Gross Profit, Operating Income

- Gross margin increased QoQ, primarily driven by the growth in sales of high-end SoC testers with high profitability.
- SG&A, including the total of “other income and expenses,” decreased by JPY 27.5 billion QoQ. In the previous quarter, an impairment loss of approximately JPY 21.4 billion was recorded for goodwill and intangible assets. In the first quarter, we recorded a gain of approximately JPY 2.5 billion from the partial transfer of a business.
- As a result, the operating profit margin for the first quarter reached 47%, marking a record high.

Investments, Cash Flow / 投資等、キャッシュ・フロー

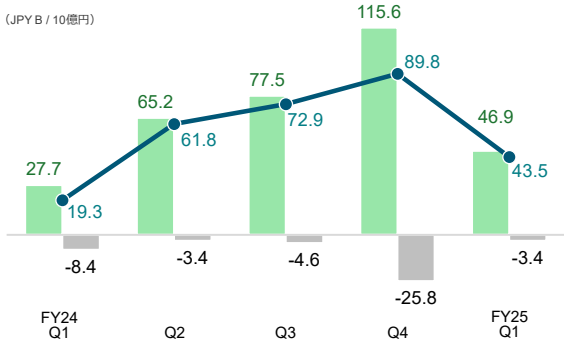
<Investments / 投資等>

- R&D Expenses / 研究開発費
- Capital Expenditure / 設備投資
- Depreciation & Amortization / 減価償却費



<Cash Flow / キャッシュ・フロー>

- Cash flows from operating activities / 営業キャッシュ・フロー
- Cash flows from investing activities / 投資キャッシュ・フロー
- Free Cash Flows / フリー・キャッシュ・フロー



* Free Cash Flows = Cash flows from operating activities + Cash flows from investing activities
フリー・キャッシュ・フロー = 営業キャッシュ・フロー + 投資キャッシュ・フロー

○ Q1 FY2025 R&D Expenses/ CapEx/ D&A

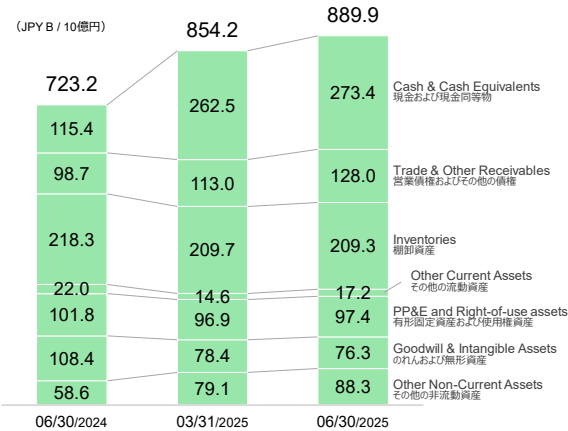
- R&D expenses were JPY 17.1 billion, and CapEx was JPY 6.1 billion.

○ Q1 FY2025 Cash Flow

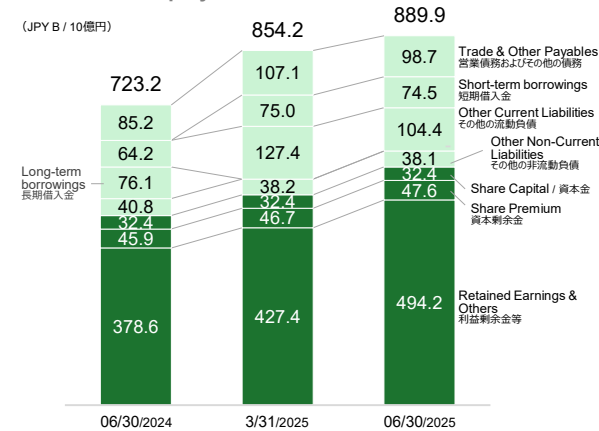
- In the first quarter, there was a decline in operating cash flow QoQ, due to an outflow associated with corporate tax, bonus payments, and other items.

Financial Position / 連結財政状態

<Assets / 資産の部>



<Liabilities & Equity / 負債・資本の部>



Equity Attributable to Owners of the Parent 親会社の所有者に帰属する持分	456.9	506.5	574.2
Ratio of Equity Attributable to Owners of the Parent / 親会社所有者帰属持分比率	63.2%	59.3%	64.5%

○ Balance Sheet for the Period Ended June 30th, 2025

- Cash and cash equivalents were JPY 273.4 billion, and inventories were JPY 209.3 billion, as of the end of June.
- Ratio of Equity Attributable to Owners of the Parent was 64.5%.
- As our business continues to perform strongly, we will continue to work on cash allocation and balance sheet management while optimally balancing growth investment and capital efficiency.
- This concludes my presentation. Now I will hand it over to Doug.



FY25 Outlook

2025年度の見通し

Douglas Lefever Representative Director, Senior Executive Officer, Group CEO
ダグラス ラフィーバ 代表取締役 兼 経営執行役員 グループCEO

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Tester Market Trends: July 2025 Outlook / テスタ市場の動向 <25年7月時点の見方>

Business Environment

- The semiconductor market demand is expected to continue to be driven mainly by AI-related applications
- Elements of uncertainty persist due to potential and ongoing geopolitical risks and the possible risk of sharp exchange rate fluctuations

Tester Market Forecast

- Raised CY25 SoC tester market size forecast as previously pervasive macroeconomic uncertainties have eased, and AI-related demand drives the market more than initially expected
- Maintained the CY25 memory tester market size forecast

事業環境

- 半導体市場の需要は、引き続き、主にAI関連アプリケーションがけん引すると予想
- 地政学的リスクの継続や急激な為替変動リスクなど、不確実性の要素は依然として残存

テスタ市場

- 広範に及んでいたマクロ経済の不確実性が緩和されたことに加え、AI関連向けの需要が当初の予想を超えており、CY25のSoCテスタ市場規模予測を上方修正
- CY25のメモリ・テスタ市場規模予想を据え置き

Source: Advantest

Market Size / 市場規模	CY24 Actual / 実績	CY25 Estimate / 推定
SoC Testers / SoCテスタ (Approx. / 約)	\$4.1B / 41億ドル	\$5.7 - 6.3B / 57-63億ドル (\$4.2 - 4.8B / 42 - 48億ドル *)
Memory Testers / メモリ・テスタ (Approx. / 約)	\$1.9B / 19億ドル	\$1.7 - 2.2B / 17-22億ドル (\$1.7 - 2.2B / 17 - 22億ドル *)

* Estimate as of April 2025 / 2025年4月時点の当社推定

○ Business Environment and Tester Market Trends

- Let me now share our perspective on the business environment and our outlook for the tester market in CY2025. The fundamental dynamics of the semiconductor industry remain largely unchanged. Growth continues to be driven primarily by AI-related applications, while demand in other segments—such as automotive and industrial—remains relatively subdued.
- Although the overall level of uncertainty has eased somewhat compared to three months ago, some risks persist. These include potential and ongoing geopolitical tensions and the possibilities of sharp fluctuations in foreign exchange rates.
- With these factors in mind, I will now update our market size forecast as follows:
- For the SoC tester market in CY2025, we are raising the market size estimate range to USD 5.7 B - 6.3 B, up from our April estimate of USD 4.2 B - 4.8 B. Back in April, although we had observed robust demand, we maintained our January TAM estimate due to prevailing macroeconomic uncertainties. Now, three months later, visibility has improved, and we have revised our forecast to reflect stronger-than-expected AI-related demand and our enhanced supply capabilities.
- For the memory tester market in CY2025, we are maintaining the market size estimate range of USD 1.7 B - 2.2 B - a relatively high level by historical standards.
- Taking all these factors into account, we now expect the semiconductor tester market to grow by about 33% YoY at the mid-point in CY2025.

FY25 Forecast / FY25業績予想

(JPY B / 10億円)	FY24	FY25 Forecast 予想					vs. FY24		Forecast as of April 4月時点予想	Change 修正額
	Results 実績	Q1 Results 実績	Q2	1H 上期	2H 下期		Change 増減額	(%)		
Sales / 売上高	779.7	263.8	237.2	501.0	334.0	835.0	+55.3	+7.1%	755.0	+80.0
Operating Income / 営業利益	228.2	124.0	96.3	220.3	79.7	300.0	+71.8	+31.5%	242.0	+58.0
Operating Margin / 営業利益率	29.3%	47.0%	40.6%	44.0%	23.9%	35.9%	+6.6pts		32.1%	+3.8pts
Income Before Tax / 税引前利益	224.8	121.4	96.1	217.5	79.5	297.0	+72.2	+32.1%	240.0	+57.0
Net Income / 当期利益	161.2	90.2	71.8	162.0	59.5	221.5	+60.3	+37.4%	179.0	+42.5
Net Income Margin / 当期利益率	20.7%	34.2%	30.3%	32.3%	17.8%	26.5%	+5.8pts		23.7%	+2.8pts
Basic EPS (JPY) / 基本一株当たり利益(円) *1	218.67	123.14	98.15	221.40	81.32	302.71	+84.04	+38.4%	243.96	+58.75
R&D Expenses / 研究開発費	71.4	17.1	19.4	36.5	40.0	76.5	+5.1	+7.1%	75.0	+1.5
Capital Expenditure / 設備投資	21.0	6.1	10.0	16.1	9.9	26.0	+5.0	+23.8%	22.0	+4.0
Depreciation & Amortization / 減価償却費	27.1	6.1	6.6	12.7	13.3	26.0	-1.1	-4.1%	25.0	+1.0
Exchange Rate (JPY) *2 為替レート(円)	1 US\$ 1米ドル	153	146	140	143	140	142	JPY 11 Appreciation 11円 円高	140	JPY 2 Depreciation 2円 円安
	1 Euro 1ユーロ	164	162	155	159	155	157	JPY 7 Appreciation 7円 円高	155	JPY 2 Depreciation 2円 円安

*1: Basic earnings per share in forecast is calculated deeming the average number of outstanding shares as the number of issued and outstanding shares as of June 30th, 2025 excluding the number of treasury shares as of June 30th, 2025 / 予想における「基本的EPS」は、2025年6月30日現在の「期末発行済株式数(自己株式を含む)」から「期末自己株式数」を除いた株式数を、期中平均株式数とみなして算定しております

*2: Our latest forecast for the impact of exchange rate fluctuations on FY25 operating income is plus JPY 2.4 billion per 1 yen of JPY depreciation vs USD, and minus JPY 0.3 billion per 1 yen of JPY depreciation vs. the Euro
為替レート変動がFY25の営業利益に与える影響の最新見通しは、対米ドルが1円安時+24億円です。対ユーロは-3億円です

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FY2025 Forecast

- In light of the first quarter results and the outlook for the remainder of the fiscal year, we are raising our full year forecast as shown on the slide, with the numbers stated all in Japanese yen.

- Sales:	835.0 billion
- Operating income:	300.0 billion
- Income before taxes:	297.0 billion
- Net income:	221.5 billion
- Basic EPS:	302.71

- The upward revision of JPY 80 billion in sales is primarily driven by SoC testers, with better-than-expected progress particularly in the first quarter of the fiscal year. We expect a temporary digestion phase in the second half of the fiscal year for SoC testers, due to the timing of next-generation device transitions, with growth projected to reaccelerate in FY2026.
- We now expect FY2025 full-year gross margins to reach approximately 60% and operating margins to reach approximately 36%, marking a historical high on an annual basis. As mentioned in my opening remarks, the strong margin profile in the first quarter was driven by a combination of factors: economies of scale, a favorable product mix, disciplined cost management, and the benefits of past investments. Among these, economies of scale were particularly amplified, supported by demand pull-ins that boosted sales. While these factors are likely to be less pronounced in the remainder of the fiscal year, we will continue to invest in further capacity expansion and in other key areas, as the anticipated ramp of next generation devices from FY2026 is expected to reaccelerate our growth trajectory following the temporary digestion period in the second half of FY2025.
- The exchange rate assumptions from the 2nd quarter onward are JPY 140 for the US dollar and JPY 155 for the euro.
- Please refer to footnote #2 which shows the effect of exchange rate fluctuations on our operating income.

Securing Our Production Capacity for the Future Demand

将来を見据えた生産能力の増強

- ✓ Advantest expanded its production capacity by approx. three times in the last several years
当社は、過去数年間でテストの生産能力を約3倍に拡大



- ✓ Continue scaling both our SoC and memory tester capacities to meet the demand of the growing semiconductor market
拡大を続ける半導体市場に対応すべく、SoCテストおよびメモリ・テストの供給能力を引き続き強化



- ✓ Advantest plans to add more production capacity with our partners, and will be securing strategic inventories to maintain quick response times
当社は、パートナーとの協力により生産能力をさらに増強。さらに、迅速な出荷に向け戦略的に在庫を保有

○ Securing Our Production Capacity for the Future Demand

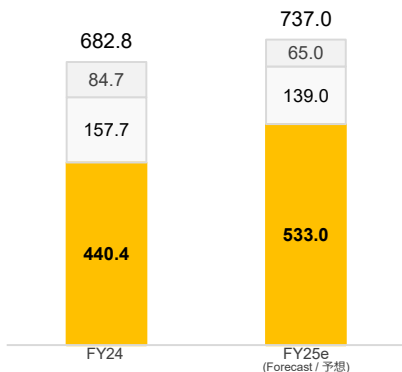
- Now, I'd like to specifically speak about our ongoing efforts to expand production capacity in anticipation of further growth in tester demand.
- Over the past several years, we have increased our production capacity by approximately three times. This has enabled us to shorten lead times and respond effectively to rising demand.
- As we look ahead to a USD 1 trillion semiconductor market, we will continue scaling our capacity — both in SoC and memory testers. Going forward, we plan to expand capacity by more than 70% compared to FY2024.
- To support this, we will be adding production capacity with our partners. Furthermore, we will be investing in strategic inventories to maintain quick response times.
- Next, I will explain the details of our sales forecast.

FY25 Outlook by Segment / FY25 事業別見通し

Sales Trends / 売上推移

(JPY B / 10億円)

■ Other Systems / その他システム
■ Memory Testers / メモリ・テスト
■ SoC Testers / SoCテスト



Test Systems / テストシステム事業

< SoC Testers / SoCテスト >

- Sales growth is expected primarily from AI-related applications, while recovery in automotive/industrial/consumer applications is expected to take time

AI関連向けを中心に、売上の伸長を予想。一方、車載・産業機器・民生品向けの回復には、なお時間を要する見込み

Applications / アプリケーション	FY22	FY23	FY24	FY25e
Computing / Communications コンピューティング・通信	65%	60%	90%	90%
Automotive / Industrial / Consumer / DDIC* 車載・産業機器・民生・DDIC*	35%	40%	10%	10%

Numbers are rounded to the nearest 5% / 内訳比率は実数ではなく、5%近似値で丸めて表示しています

* DDIC: Display Driver IC / ディスプレイ・ドライバIC

☐ FY2025 Test Systems Outlook

☐ SoC testers

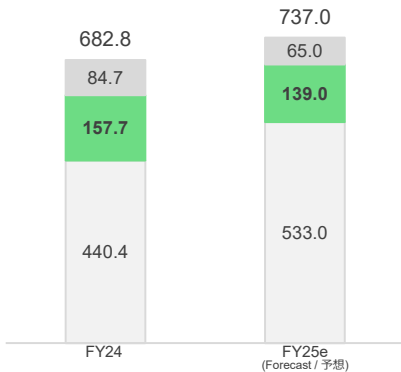
- We have revised our FY2025 SoC tester sales forecast upward by JPY 88.0 billion from the April projection.
- In the first three months of this fiscal year, we successfully capitalized on the sustained demand of AI-related demand by scaling our supply capabilities. While we expect lumpiness in sales and deliveries in the second half, we are also preparing for what we expect to be a reacceleration of complexity-driven growth in FY2026, as new devices currently under development go into volume production.
- Meanwhile, demand in non-AI segments remains soft.

FY25 Outlook by Segment / FY25 事業別見通し

Sales Trends / 売上推移

(JPY B / 10億円)

■ Other Systems / その他システム
■ Memory Testers / メモリ・テスト
■ SoC Testers / SoCテスト



Test Systems / テストシステム事業

< Memory Testers / メモリ・テスト >

- Sales are expected to remain elevated particularly for AI-related high-performance DRAM

AI関連の高性能DRAM向けを中心に高水準な売上を維持すると予想

Applications / アプリケーション	FY22	FY23	FY24	FY25e
DRAM	60%	90%	95%	90%
Non-Volatile Memory / 不揮発性メモリ	40%	10%	5%	10%

Numbers are rounded to the nearest 5% / 内訳比率は実数ではなく、5%近似値で丸めて表示しています

☐ FY2025 Test Systems Outlook

☐ Memory testers

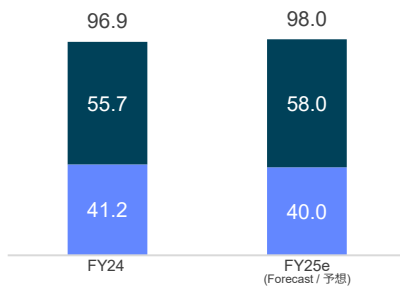
- Our FY2025 memory tester sales outlook remains largely unchanged from the April forecast. As our customers continue to advance their technology roadmaps, we are placing the highest priority on expanding our supply capabilities in this segment as well, ensuring that we are well-positioned to support their evolving needs.

FY25 Outlook by Segment / FY25 事業別見通し

Sales Trends / 売上推移

(JPY B / 10億円)

■ Support Services / サポート・サービス
■ Others / その他



Services & Others / サービス他

< Support Services / サポート・サービス >

- Demand for maintenance service is firm due to steady growth of our installed base
当社製品の設置台数の着実な伸びにより、サポート・サービスの需要は堅調

< Others / その他 >

- Sales of test interface boards and test sockets remain on plan, while nano-technology business is experiencing some delays in demand
ナノテクノロジー製品は一部需要の後ろ倒しがあるものの、テスト用インターフェイスボードやテストソケットの売上は、引き続き想定通り進捗する見通し

☐ FY2025 Outlook for Services & Others

☐ Support Services

- For support services, we expect steady demand due to the continued growth of our installed base.

☐ Others

- Sales of test interface boards and test sockets remain on plan, while the nano-technology business is experiencing some delays in demand.



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- Finally, I would like to close with the following remarks.
- We are pleased with a strong start to FY2025. While the second half of the fiscal year may see a temporary digestion, we expect growth to reaccelerate in FY2026.
- Therefore, scaling our capabilities in our supply chains remains our highest priority.
- At the same time, we remain fully focused on executing our four key strategies of “Outpace the Growth in our Market,” “Expand Adjacently/New Businesses,” “Drive Operational Excellence,” and “Enhance Sustainability.”
- As we look ahead, we are encouraged by the evolving industry dynamics and confident in the position we are in.
- At our Q2 FY2025 Financial Briefing, scheduled for the end of October, we plan to elaborate further on these topics, as The Third Mid-Term Plan is well-due for an update.
- This concludes my presentation. Thank you for your attention.