



# 可成科技

2020年第四季暨全年度營運成果說明

2021/03



# 免責聲明

- This presentation contains “forward-looking statements”- that is, statements related to future, not past, events. In this context, forward-looking statements often address our expected future business and financial performance, and often contain words such as “expects”, “anticipates”, “intends”, “plans”, “believes”, “seeks”, or “will”.
- Forward-looking statements involve inherent risks and uncertainties. We caution you that a number of important factors could cause actual results to differ materially from those contained in any forward-looking statement. Such factors include, but are not limited to: our highly competitive environment; the cyclical nature of our business; our ability to develop new products; and our successful execution in new business developments.

# 2020年第四季財務摘要

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- 營收新台幣 186.83億，季減 21.1%/年減 41.5%，主因手機舊機在新機上市後需求顯著降溫影響
- 毛利率 30.1%，季增1.2%/年增4.7%，主因產品組合及折舊費用降低
- 營業利潤率 17.9%，季減4.8%/年減0.1%，營業費用增加因泰州子公司出售產生一次性相關費用
- 稅前淨利 273.40億，季增678.0%/年增460.4%，因2020年底完成泰州子公司股權交割，認列處份利益NT\$259.51億
- 稅後淨利(歸屬業主) 138.73億，季增2338.1%/年增302.2%，所得稅費用增加因泰州子公司出售產生一次性相關稅負
- 基本EPS NT\$ 18.16元，上季為 NT\$ 0.75元/2019年第四季為 NT\$ 4.48元
- 第四季CAPEX 4.0億，2019年同期為 8.9億
- 第四季折舊攤銷費用 6.2億，上一季為 26.7億，2019年第四季28.3億
- 第四季EBITDA 39.6億，上一季為 80.5億，2019年第四季為 85.7億

•EBITDA = Operating Profit + Depreciation + Amortization

# 2020年全年財務摘要

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- 營收新台幣 825.06億，年減10%，筆電及平板需求成長，惟手機新舊產品交替期延長，手機舊機在新機上市後需求顯著降溫影響
- 毛利 219.19億，年減1.6%；毛利率 26.6%，年增2.3%，因產品組合及折舊費用降低
- 營業利潤 149.35億，年增5.9%；營業利潤率18.1%，年增2.7%，因毛利提升且營業費用降低
- 稅前淨利 408.47億，年增104.4%，因泰州子公司股權處份利益認列；稅前利潤率49.5%，年增27.7%
- 稅後淨利(歸屬業主) 211.30億，年增87.5%，稅後利潤率25.6%，年增13.3%
- 基本EPS NT\$ 27.65元，2019年為 NT\$ 14.63元
- CAPEX 14.5億，2019年為40.3億
- 折舊攤銷費用 87.9億，2019年為 121.2億
- EBITDA 237.2億，2019年為 262.3億
- EBITDA = Operating Profit + Depreciation + Amortization

# 合併損益表 4Q20 vs. 3Q20

| (In NTD mn) | 4Q20     |        | 3Q20    |        | qoq      |
|-------------|----------|--------|---------|--------|----------|
|             | 金額       | %      | 金額      | %      |          |
| 營業收入        | 18,683   | 100.0% | 23,668  | 100.0% | -21.1%   |
| 營業毛利        | 5,628    | 30.1%  | 6,835   | 28.9%  | -17.7%   |
| 營業費用        | 2,290    | 12.3%  | 1,455   | 6.1%   | 57.4%    |
| 營業利潤        | 3,338    | 17.9%  | 5,380   | 22.7%  | -38.0%   |
| 營業外收入/支出    | 24,002   | 128.5% | - 1,866 | -7.9%  | n.m.     |
| 稅前淨利        | 27,340   | 146.3% | 3,514   | 14.8%  | 678.0%   |
| 稅後淨利 (歸屬業主) | 13,873   | 74.3%  | 569     | 2.4%   | 2338.1%  |
| 基本每股盈餘      | \$ 18.16 |        | \$ 0.75 |        | \$ 17.41 |
| EBITDA      | 3,956    | 21.2%  | 8,054   | 34.0%  | -50.9%   |

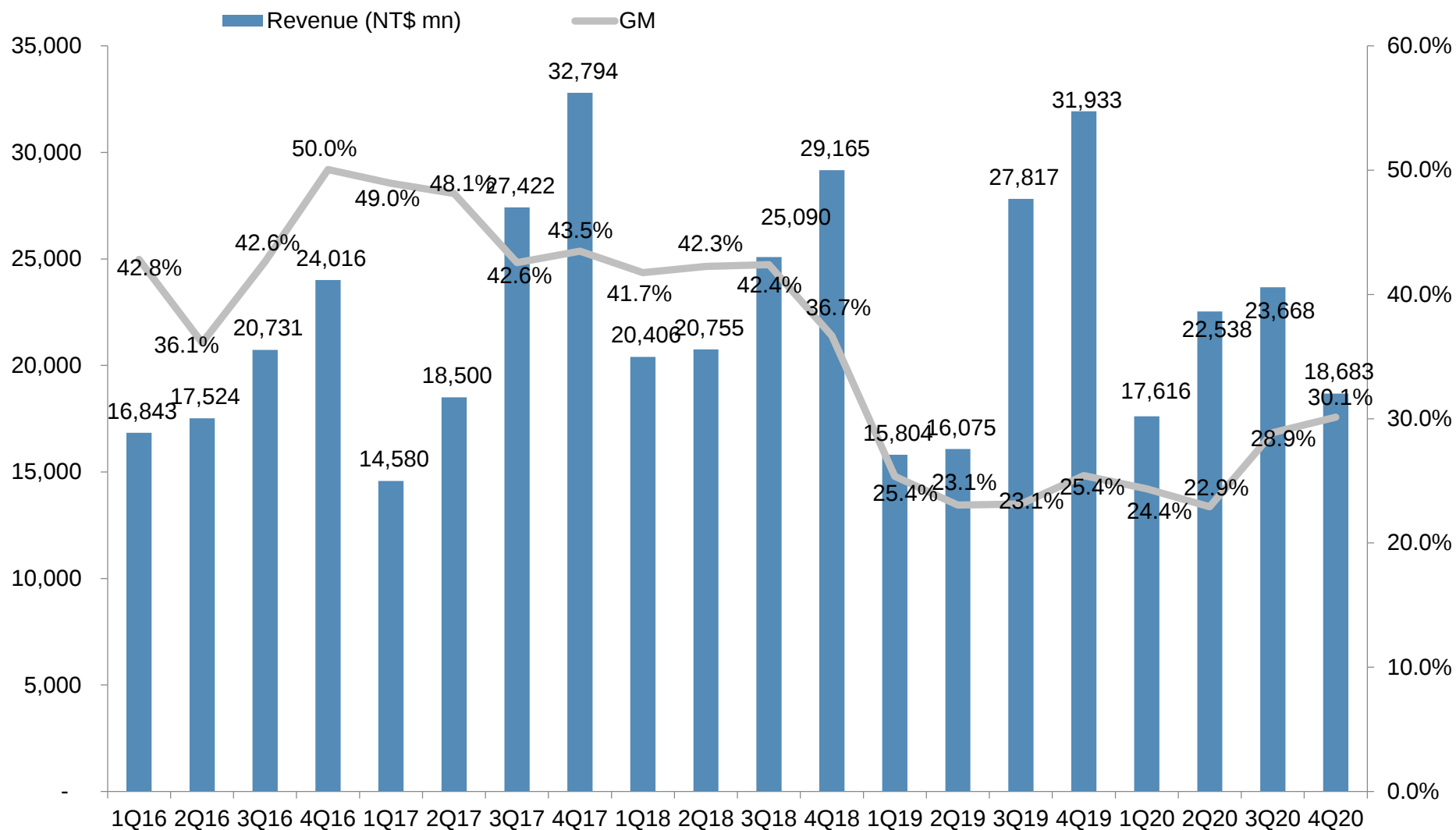
# 合併損益表 4Q20 vs. 4Q19

| (In NTD mn) | 4Q20     |        | 4Q19    |        | yoy      |
|-------------|----------|--------|---------|--------|----------|
|             | 金額       | %      | 金額      | %      |          |
| 營業收入        | 18,683   | 100.0% | 31,933  | 100.0% | -41.5%   |
| 營業毛利        | 5,628    | 30.1%  | 8,118   | 25.4%  | -30.7%   |
| 營業費用        | 2,290    | 12.3%  | 2,374   | 7.4%   | -3.5%    |
| 營業利潤        | 3,338    | 17.9%  | 5,744   | 18.0%  | -41.9%   |
| 營業外收入/支出    | 24,002   | 128.5% | - 865   | -2.7%  | n.m.     |
| 稅前淨利        | 27,340   | 146.3% | 4,879   | 15.3%  | 460.4%   |
| 稅後淨利 (歸屬業主) | 13,873   | 74.3%  | 3,449   | 10.8%  | 302.2%   |
| 基本每股盈餘      | \$ 18.16 |        | \$ 4.48 |        | \$ 13.68 |
| EBITDA      | 3,956    | 21.2%  | 8,572   | 26.8%  | -53.8%   |

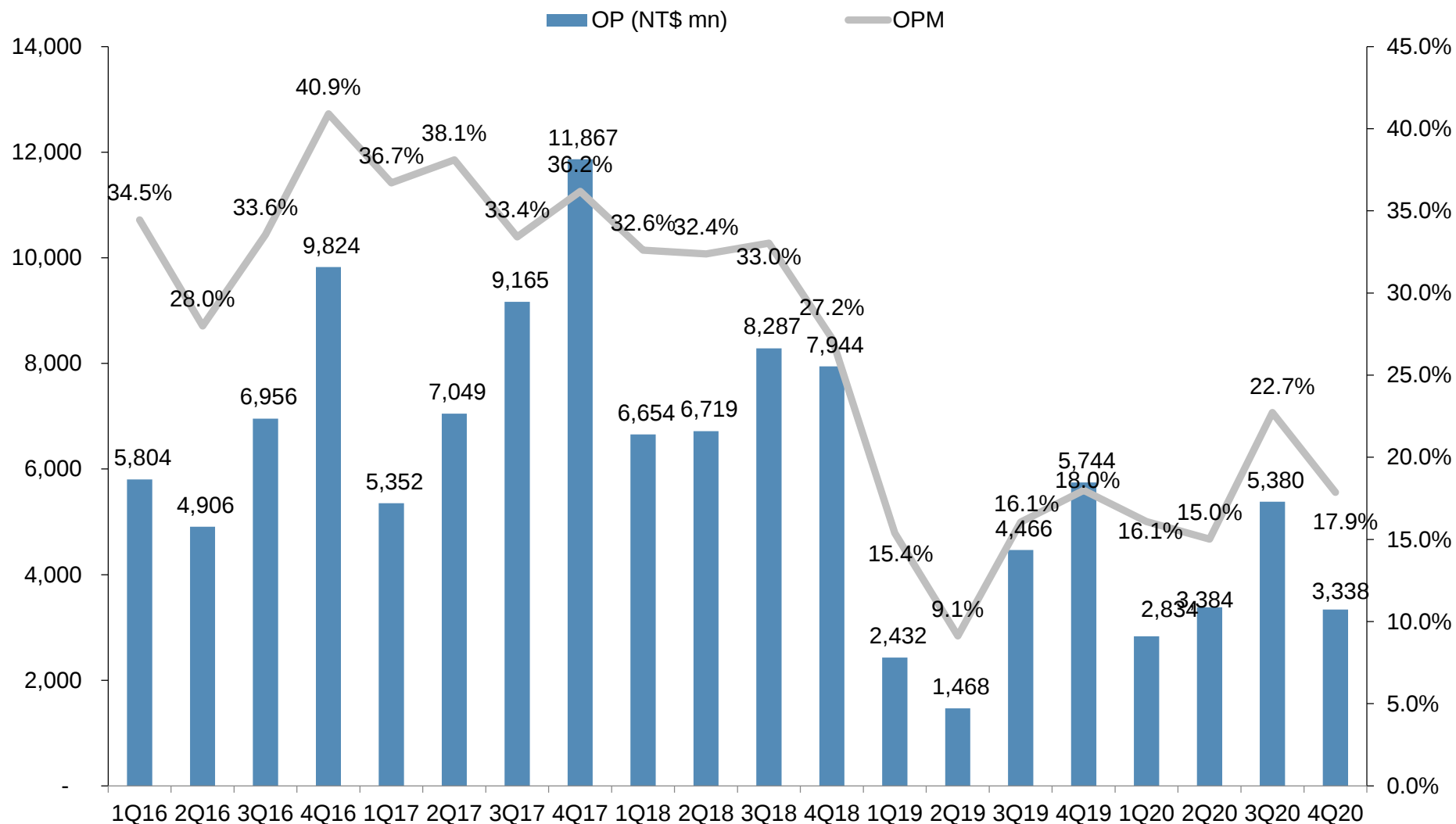
# 合併損益表 2020 vs. 2019

| (In NTD mn) | 2020     |        | 2019     |        | yoy      |
|-------------|----------|--------|----------|--------|----------|
|             | 金額       | %      | 金額       | %      |          |
| 營業收入        | 82,506   | 100.0% | 91,628   | 100.0% | -10.0%   |
| 營業毛利        | 21,919   | 26.6%  | 22,267   | 24.3%  | -1.6%    |
| 營業費用        | 6,984    | 8.5%   | 8,158    | 8.9%   | -14.4%   |
| 營業利潤        | 14,935   | 18.1%  | 14,109   | 15.4%  | 5.9%     |
| 營業外收入       | 25,912   | 31.4%  | 5,874    | 6.4%   | 341.1%   |
| 稅前淨利        | 40,847   | 49.5%  | 19,983   | 21.8%  | 104.4%   |
| 稅後淨利 (歸屬業主) | 21,130   | 25.6%  | 11,272   | 12.3%  | 87.5%    |
| 基本每股盈餘      | \$ 27.65 |        | \$ 14.63 |        | \$ 13.02 |
| EBITDA      | 23,725   | 28.8%  | 26,231   | 28.6%  | -9.6%    |

# 近年營業收入&毛利率



# 近年營業利潤&營業利潤率



# 合併資產負債表

| (In NT\$ mn)  | 4Q20           |             | 3Q20           |             | 4Q19           |             |
|---------------|----------------|-------------|----------------|-------------|----------------|-------------|
| 總資產           | <b>255,903</b> | <b>100%</b> | <b>244,114</b> | <b>100%</b> | <b>243,114</b> | <b>100%</b> |
| 現金及約當現金       | 111,883        | 44%         | 91,165         | 38%         | 69,017         | 28%         |
| 流動資產          | 201,877        | 79%         | 174,763        | 72%         | 191,845        | 79%         |
| 固定資產          | 22,568         | 9%          | 34,318         | 14%         | 41,297         | 17%         |
| 總負債           | <b>97,832</b>  | <b>38%</b>  | <b>100,367</b> | <b>41%</b>  | <b>94,526</b>  | <b>39%</b>  |
| 流動負債          | 91,463         | 36%         | 99,151         | 41%         | 93,271         | 38%         |
| 長期負債          | 6,369          | 2%          | 1,216          | 0%          | 1,255          | 1%          |
| 母公司股東權益       | <b>157,975</b> | <b>62%</b>  | <b>143,663</b> | <b>59%</b>  | <b>148,463</b> | <b>61%</b>  |
| 負債及股東權益總計     | <b>255,903</b> | <b>100%</b> | <b>244,114</b> | <b>100%</b> | <b>243,114</b> | <b>100%</b> |
| 每股淨值          | 206.7          |             | 187.8          |             | 192.7          |             |
| 普通股加權平均股數(mn) | 764.102        |             | 764.936        |             | 770.391        |             |

# 合併現金流量表

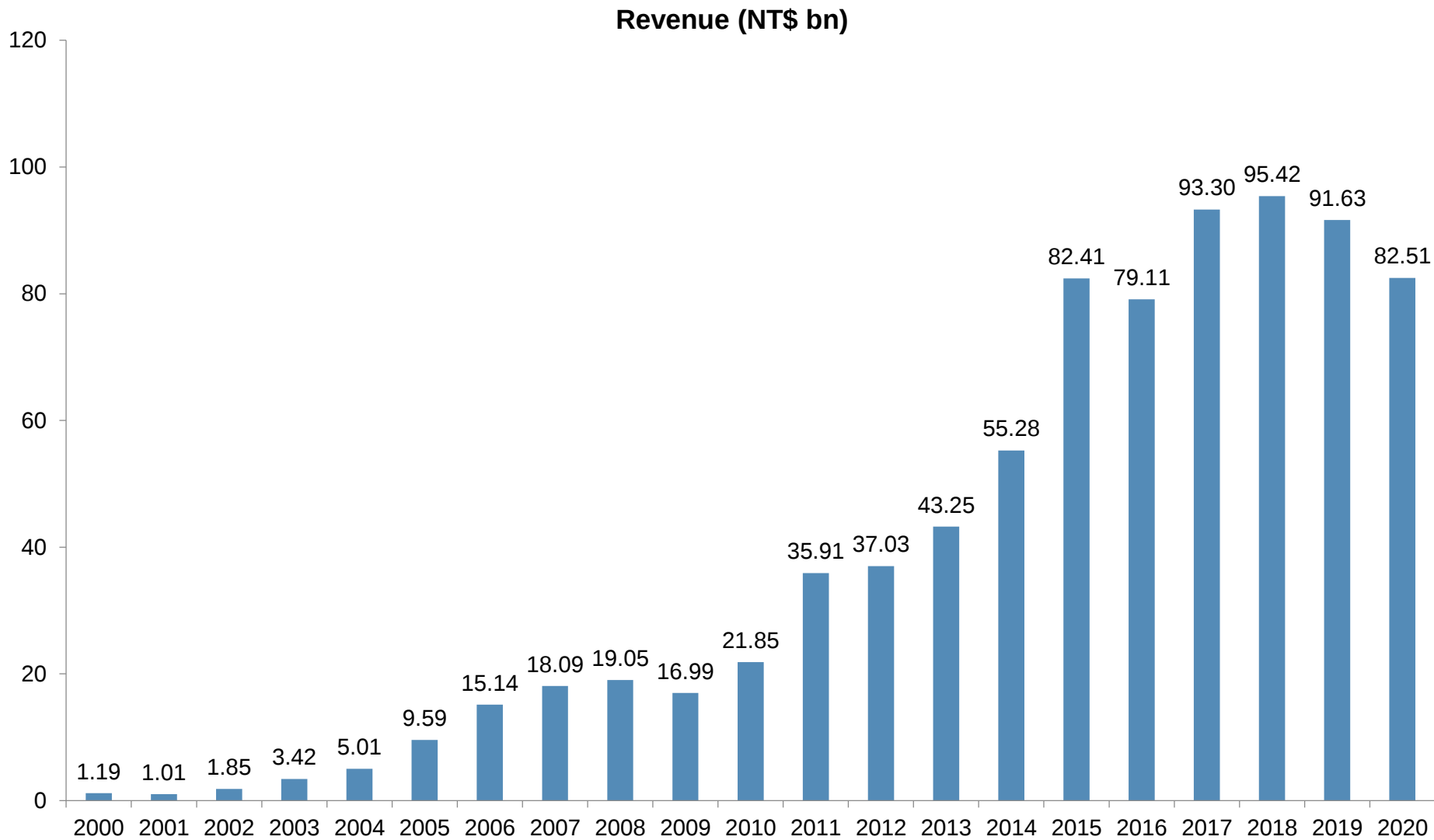
| (NT\$ mn)    | 2020    | 2019     |
|--------------|---------|----------|
| 期初現金         | 69,017  | 29,304   |
| 營運活動之現金流入(出) | 20,304  | 25,802   |
| 折舊&攤銷        | 8,790   | 12,121   |
| 投資活動之現金流入(出) | 30,959  | 28,651   |
| 資本支出         | - 1,452 | - 4,030  |
| 融資活動之現金流入(出) | - 6,120 | - 13,377 |
| 長短期借款        | 4,018   | - 3,104  |
| 匯率影響數        | - 2,277 | - 1,363  |
| 現金水位變化       | 42,866  | 39,713   |
| 期末現金         | 111,883 | 69,017   |
| EBITDA       | 23,725  | 26,231   |
| 自由現金流量       | 18,853  | 21,772   |



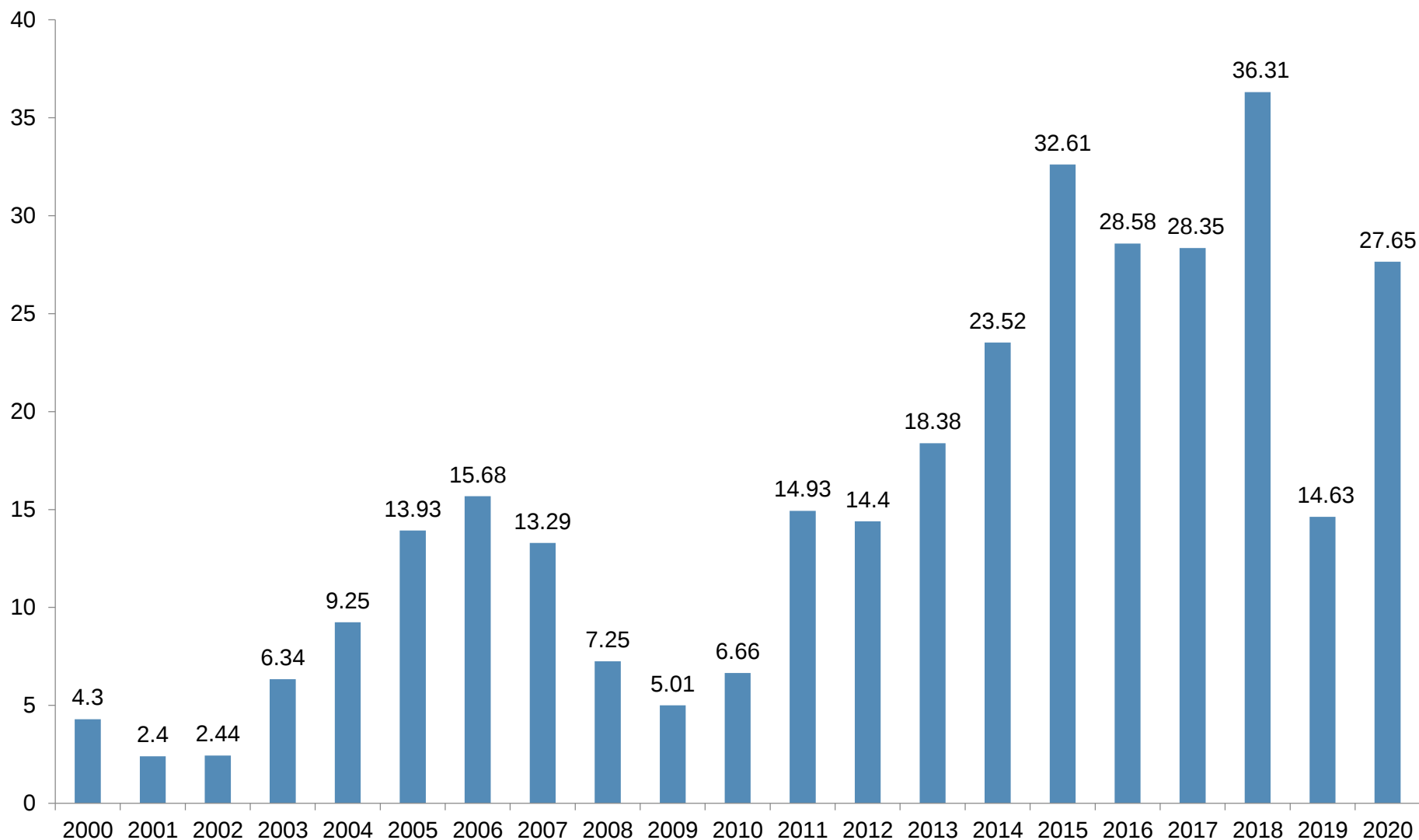
## 參考附錄

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# 營收趨勢 (2000 - 2020)



# 基本每股盈餘趨勢 (2000 - 2020)





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