

# TechNexion Ltd.

16F No. 736 Zhongzheng Road  
Chung Ho District, 23511, New Taipei City,  
Taiwan R.O.C.  
Phone : +886-2-8227 3585  
Fax : +886-2-8227 3590

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Dear valued customers,

We would like to share an important update regarding the current memory and storage supply situation.

In recent weeks, we received sudden notices from our key upstream suppliers – Micron, Kingston, Samsung, SK Hynix and others – that their upcoming deliveries have been postponed and de-committed.

The market is currently experiencing a serious shortage of both DRAM (DDR3, DDR3L, DDR4, LPDDR4, LPDDR5) and NAND Flash (SSD, eMMC, SD, microSD). This situation worsened in recent weeks due to growing demand from large datacenters and AI hyper-scalers driven by the expansion plans of major cloud service providers.

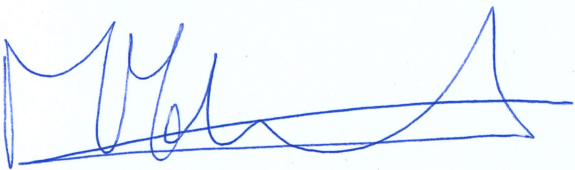
All major chip makers are prioritizing supply to those customers first, and this leads to rising prices and very limited availability in the open market. We have witnessed price increases of 50-100% in the past several weeks. The price uptrend continues in a very fast pace and abnormal percentage.

This situation is expected to continue for the medium to long term.

Please be assured that we are working closely with our suppliers and management teams to secure additional supply and stabilize delivery schedules. We truly appreciate your understanding and patience as we navigate this difficult situation together.

If you have any urgent requirements or ongoing projects that need special attention, please don't hesitate to contact us. We will do our best to coordinate internally and try to support your needs.

Thank you for your continuous trust and partnership.



Marcel vandenHeuvel  
CEO  
TechNexion