

## Q&A Session

### Speaker

- J.T. Wang (CEO & Chairman)
- Jim Wong (Corporate President)
- Lilia Wang (CFO)

#### 1. Where did Acer's strong 3Q11 sales growth (+10% QoQ) come from?

Acer achieved 3Q11 revenue above expectations due to stronger PC shipments, especially in the September month, and better ASP recovery in the EMEA market.

#### 2. What was Acer's tablet PC shipment in 3Q11?

3Q11 tablet shipments were slightly lower than the 800K in 2Q11. However, Acer maintains its 2011 full-year tablet PC shipment guidance of 2 – 2.5mn units.

#### 3. Why did OPEX increase in 3Q11?

OPEX increased due to A) higher marketing costs related to the business model restructuring and B) a more conservative principle on legal and patent reserve.

#### 4. How severe is the impact to Acer from the flood in Thailand?

The situation is severe, but the exact time table for a full recovery is unknown at the current time being. However, it is clear that the impact would not only be near-term. There will definitely be price hikes for HDD storage, but the magnitude is uncertain for now and would most likely be transferred to end users.

#### 5. What is Acer's 4Q11 guidance?

Acer expects PC shipments to decline 5% to 10% QoQ. As for the operating margin, Acer will strive for 0% to 1%.

#### 6. What is Acer's full-year guidance for 2012?

Acer expects mobile device shipments to grow +10% YoY, in-line with industry expectations (excluding Apple).

#### 7. What are Acer's expectations on Ultrabooks in the near future?

Acer expects the penetration rate for Ultrabooks in 2012 to reach around 25 - 35%.

Acer plans to launch its next generation Ultrabooks in early 2012.

**8. What are Acer's thoughts on further tablet developments?**

Acer will continue to produce Android tablets with better integration to the Acer Cloud and the launch of Windows 8 will provide a great opportunity to develop tablet devices with higher productivity.