

Global Semiconductors & Semiconductor Capital Equipment

2026 Semiconductor & Semiconductor Capital Equipment Investor Guide

Please find attached our updated 2026 Investor Guide.

We appreciate your 5-star vote (search "o'malley barclays") in the 2026 Extel All-America Research Survey in the Semiconductors & Semiconductor Capital Equipment category. Vote 5 Stars [Here](#)

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Dear Barclays Client,

In conjunction with our European Technology Hardware team, we are pleased to send you our updated "2026 Semiconductor & Semiconductor Capital Equipment Investor Guide" poster. We would ask that if you appreciated our work this year, like this poster, or listened to "Chipping In", to please vote 5-stars for us in the Extel survey link above!

 **2026 Semiconductor & Semiconductor Capital Equipment Investor Guide**

We are in the process of printing the posters and will get those shipped off as soon as we can for those who would like a physical copy (we find it useful to have as a reference on our desks). Please reach out to cannon.kenney@barclays.com with a mailing address if you'd like for us to

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Please see analyst certifications and important disclosures beginning on page 3.

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ship you a physical copy. With that – cheers to a sunny kickoff to summer and more time spent together in the near future!

Thank you,

Tom, Kyle, Matt, Trip and Cannon

