

Exhibit D

Trial Exhibit 105

From: Alice Ho 何秀玲 <AliceHo@auo.com>
Sent: Wednesday, February 8, 2006 3:56 PM (GMT)
To: Yi An Chen 陳怡安 <yianchen@auo.com>; Richard Bai 白柏龍 <richardbai@auo.com>; Dominic Chen 陳豪智 <dominicchen@auo.com>
Cc: Hubert Lee 李燦榮 <hubertlee@auo.com>; Michael WK Wong 黃永強 <michaelwkwong@auo.com>; Joselyn Liu 劉慧君 <joselynliu@auo.com>
Subject: RE: March price idea from HP.

Dear all,

1) information from QDI--
 # their **Feb. pricing** to HP is about \$3~5 higher than HP's Mar. target. And, they target to meet Junichi's pricing idea in Mar.
 # QDI shipped 150K+ to HP in Jan. with "rebate" proposal.
 # QDI and CMO had a chat this morning, and they are sure AUO's volume is about 200k range from someone in HP GPS.

2) information from FSC--Both Acer and HP's 15.4" sales are quite slow in EU in Jan./Feb.

B.RGDS,
 Alice

-----Original Message-----

From: Yi An Chen 陳怡安
Sent: 2006/2/8 [星期三] 下午 10:06
To: Richard Bai 白柏龍; Dominic Chen 陳豪智; Alice Ho 何秀玲
Cc: Hubert Lee 李燦榮; Michael WK Wong 黃永強; Joselyn Liu 劉慧君
Subject: RE: March price idea from HP.

Dear all,

Herewith some information from competitors and you may see in attachment as well.

BRGDS,
 Joanne

Jan	AUO	SEC	CMO	HP's target to CMO in Feb
14.1"XGA	\$128	\$125	\$132	
14.0"W	\$130	\$130	\$132	\$120
15"XGA	\$130	\$130	\$135	
15.4"W	135~134	\$133	\$132	\$125
17"W	\$180	\$175	Nil	

SEC:

- \$5 gap for 15XGA AG and BV, no gap for 15.4"W AG & BV
- \$7 gap for 17"W AG & BV and shipped to HP 20K+ in Jan
- HP/ Cloudy told him that HP reduce their fct from 1M to 910K for Feb since demand decrease recently

CMO:

- CMO's actual shipment of Jan is 60~70K not 100K
- CMO head an evidence show AUO shipped 200K+ in Jan and I denied it.

UNITED STATES DISTRICT COURT
 NORTHERN DISTRICT OF CALIFORNIA
 CR-09-0110 SI
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 By: _____ (Deputy Clerk)

ALL MDI_02832114

- It seems that CMO can know all suppliers' Jan shipment
* LPL: 350K
* SEC: 100K+
* QDI: 120K

-----Original Message-----

From: Richard Bai 白柏龍
Sent: Wednesday, February 08, 2006 4:29 PM
To: Dominic Chen 陳豪智; Yi An Chen 陳怡安; Alice Ho 何秀玲
Cc: Hubert Lee 李燦榮; Michael WK Wong 黃永強; Joselyn Liu 劉慧君
Subject: RE: March price idea from HP.

Let's have a discussion.

Richard

-----Original Message-----

From: Dominic Chen 陳豪智
Sent: Wednesday, February 08, 2006 2:35 PM
To: Yi An Chen 陳怡安; Alice Ho 何秀玲
Cc: Hubert Lee 李燦榮; Richard Bai 白柏龍; Michael WK Wong 黃永強; Joselyn Liu 劉慧君; Dominic Chen 陳豪智
Subject: March price idea from HP.
Importance: High

Joanne,

In the mail down stairs is Junichi's March price proposal.
Please take a look first.

Let's try to get other competitor's status for reference
before we try to feed back out proposal to HP.

Regards,

Dominic

-----Original Message-----

From: Dominic Chen 陳豪智
Sent: 2006/2/8 [星期三] 上午 12:26
To: Yamashita, Junichi
Cc: Lee, Rita; Dominic Chen 陳豪智
Subject: RE: AUO Paul and Richard's visit at Feb. 22rd ~ 23rd.

Junichi,

Thanks for your hard work to release your preliminary idea to AUO.
We'll base on your idea as a start point to prepare our proposal.

In the mean time, I'm trying to settle down a meeting arrangement
for Tim and Richard in the morning of Feb. 22nd even Jun will not
be available at that week. I'll confirm the attendee with Rita
tomorrow morning.

Thanks for your support as always. We'll get back to you ASAP.

Regards,

Dominic

-----Original Message-----

From: Yamashita, Junichi [<mailto:junichi.yamashita@hp.com>]
 Sent: 2006/2/7 [星期二] 下午 08:46
 To: Dominic Chen 陳豪智
 Cc: Lee, Rita; Yamashita, Junichi
 Subject: RE: AUO Paul and Richard's visit at Feb. 22rd ~ 23rd.

Dominic,

Thanks for your support to HP as always. Appreciated.
 Let me share my "preliminary" price target for Mar. with you as just your reference. Hope this is help for you to draft up AUO's proposal to HP for Mar. business. As Mar. price target is approaching the break-even price, I don't think Apr. price would go down a lot except 17" Wide LCD. I still believe 17"W panel price should be much lower than current level in Q2.

LCD	Feb. HP price (est.)	Mar. HP price (est.)
14" XGA	\$120	\$120
14.0" WXGA AG	\$115	\$110
14.0" WXGA BV	\$115	\$110
15" XGA AG	\$120	\$115
15" XGA BV	—	—
15.4" WXGA AG	\$125	\$120
15.4" WXGA BV	\$125	\$120
17" WXGA+ AG	\$170	\$165
17" WXGA+ BV	\$175	\$170

Per Mar. allocation quantity, we should review and update it through HP's weekly demand forecast to you.

As we talked, HP's business is 819K actual shipment in Jan., around 900K in Feb. and around 1M in Mar. As Q1 is NBPC LCD over supply quarter, it's still a smart idea to secure the Mar. volume within HP ASAP before all of other suppliers rush to us and negotiate special deals. (some are already done.) My personal opinion is I urge you to arrange HP/AUO management meeting in Feb. even Jun and Rita are going to visit you some time in early Mar.

Good evening.

Junichi Yamashita
 LCD Commodity Manager
 Hewlett-Packard Co.

Work: 281-514-5250
 Fax: 281-518-2432
 Cell: 281-727-1799

-----Original Message-----

From: DominicChen@auo.com [<mailto:DominicChen@auo.com>]
 Sent: Tuesday, February 07, 2006 4:42 PM

To: Lee, Rita
Cc: Kim, Jun B (Houston Notebook PC); Tierney, Tim; Yamashita, Junichi;
DominicChen@auo.com
Subject: AUO Paul and Richard's visit at Feb. 22rd ~ 23rd.
Importance: High

Rita,

How are you today !

AUO Paul, VP of ITBG, and Richard is trying to visit Jun at the date of Feb. 22nd or 23rd. We are going to discuss March or even April business, and let Paul take the chance to visit Jun.

At the time when Jun visit Taiwan at the week of Mar. 6th, many people are all in Europe for Cebit show, probably only Kuma will be available at the date of Mar. 10th. I'm still checking for Richard's schedule at the week of March 6th.

But anyway, please help to finilize the meeting date for Paul and Richard's visit this time.

Regards,

Dominic

Trial Exhibit 139

From: Steven Leung 梁兆龍 <StevenLeung@auo.com>
Sent: Wednesday, February 8, 2006 5:25 AM (GMT)
To: Tony Hsu 許晉綸 <TonyHsu@auo.com>
Cc: Nero Hung 洪沼源 <NeroHung@auo.com>; Michael WK Wong 黃永強 <MichaelWKWong@auo.com>; Mandy Chen 陳世偉 <MandyChen@auo.com>
Subject: RE: Feb. Invoice price for HP orders

OK. Thanks.
Steven

-----Original Message-----

From: Tony Hsu 許晉綸
Sent: Tuesday, February 07, 2006 9:15 PM
To: Steven Leung 梁兆龍
Cc: Nero Hung 洪沼源; Michael WK Wong 黃永強; Mandy Chen 陳世偉; Tony Hsu 許晉綸
Subject: RE: Feb. Invoice price for HP orders

Dear Steven,

We update the invoice pricing for 15" and 17" since we referenced:

1. AUO-Dell Feb. pricing: \$125 and \$143.
2. Competitors CPT and CMO update offers: \$125, \$145. CMO: \$145 for 17".
3. Price View and DS avg. price for Feb. update to \$125 and \$145.

To prevent too high prices gap rebate to HP following the Q1 proposal, we modify the 15" and 17" invoice price for Feb. since the changes are within your bottom line prices.

From now on we will check with you in advance for any price update offering.

Tony

-----Original Message-----

From: Steven Leung 梁兆龍
Sent: 2006/2/7 [星期二] 下午 06:10
To: Tony Hsu 許晉綸; Mandy Chen 陳世偉
Cc: Nero Hung 洪沼源; Michael WK Wong 黃永強
Subject: RE: Feb. Invoice price for HP orders

Dear Tony & Nero,

How was the update pricing figures decided? I was not informed. Please talk to me for pricing issues. I will usually provide a bottom-line and price range for account managers to negotiate -- this is not the first time we are working together so you should know my expectations. Do not update pricing (net or invoice) decisions to me after the customer and everyone else is already informed. Effective immediately, I will not support any pricing decisions if I am not properly consulted or informed. Thanks for your cooperation.

P.S. Please explain to me if I had mis-understood the situation. Thanks again.

Steven

UNITED STATES DISTRICT COURT NORTHERN DISTRICT OF CALIFORNIA CR-09-0110 SI	
Government Exhibit #:	<u>139</u>
Date Admitted:	_____
By:	_____ (Deputy Clerk)

To: Jason Ting 丁豪; Mandy Chen 陳世偉; Albert Huang 黃家榮
Cc: Nero Hung 洪沼源; Steven Leung 梁兆龍; Michael WK Wong 黃永強; Tony Hsu 許晉綸
Subject: RE: Feb. Invoice price for HP orders
Importance: High

Dear Team,
Update Invoice Price:
15" \$125
17" \$145.

Please support for the prices update.

Best regards,
Tony

-----Original Message-----

From: Tony Hsu 許晉綸
Sent: Monday, February 06, 2006 11:41 AM
To: Jason Ting 丁豪; Mandy Chen 陳世偉; Albert Huang 黃家榮
Cc: Nero Hung 洪沼源; Steven Leung 梁兆龍; Michael WK Wong 黃永強; Tony Hsu 許晉綸
Subject: Feb. Invoice price for HP orders

Dear All,
Please use the following prices for Feb. Invoice prices:
15" \$127
17" \$147
19" TN \$185
19" TN G \$202
19" VA \$203
19" VA OD \$213

Any update HP accepts prices, I will inform you soon.

Best regards,

Tony Hsu / Senior Sales Engineer
Desktop Display Business Unit Sales Div. I
AU Optronics Corporation 友達光電
e-mail: tonyhsu@auo.com
DDT :+ 886-3-500-8800 ext.7761
Mobile: +886-915-881305
Fax: 03-5797320
www.auo.com

AU-MDL-03496139

From: Shaders Lin 林靜美 <ShadersLin@auo.com>
Sent: Thursday, February 9, 2006 7:22 AM (GMT)
To: James CP Chen 陳建斌 <JamesCPChen@auo.com>; WJ Cheng 鄭文俊 <WJCheng@auo.com>; CM Wung 翁崇銘 <CMWung@auo.com>; Amanda Guo 郭伶玲 <AmandaGuo@auo.com>; Steven Leung 梁兆龍 <StevenLeung@auo.com>
Cc: Paul SL Peng 彭雙浪 <PaulSLPeng@auo.com>
Subject: RE: 市場狀況概說

Dear All,

Please see in line.

-----Original Message-----

From: James CP Chen 陳建斌
Sent: Wednesday, February 08, 2006 11:03 PM
To: WJ Cheng 鄭文俊; CM Wung 翁崇銘; Shaders Lin 林靜美; Amanda Guo 郭伶玲; Steven Leung 梁兆龍
Cc: Paul SL Peng 彭雙浪
Subject: RE: 市場狀況概說

Dear All,

Update some market information as follows.

1. SEC/JK Kim said SEC VD got demand upside from Jan'06 since they cut down \$20 for LCD MNT set. And, they may get \$30M loss for LCD monitor business in Jan'06. So, they ask vendor to understand their situation and support them with aggressive price.
2. SEC/BG said AMLCD offer \$137 for 17" and \$177 for 19", but BG are not satisfied with this price proposal because he think Dell get around \$7~\$8 price support in Feb and expect their vendors to support them with same price reduction.

[Shaders Lin 林靜美]

- SEC's MNT SET Price

17"-->\$349-->\$349
 19"-->\$399-->\$379

- SEC ask AMLCD \$138 for 17" and \$178 for 19". But, AMLCD would like to keep 19" above \$180 at least.
- HSD \$175 for 19", but only for SEC. For others, the price still keeps around \$180-185.

3. SEC/BG said they are buying 200k/m 19" from HSD and SEC VD are trying to reduce AMLCD's portion, so he can support 19" volume upside to 100k or even 130k in Feb if we can support SEC VD with competitive price. As for 17", he mentioned the possibility for demand upside is small relatively. But I think it does not make any sense if HSD and AMLCD can support them with more volume and aggressive price in the upcoming months.

[Shaders Lin 林靜美]

- It's true that SEC took 19" ~200k/m at \$175 from HSD.

4. SEC/BG mentioned LPL's G7.5 is not as smooth as expected and LGE people mentioned their Sales team are requesting 42" LCD TV, but they can not deliver now. And that is quite in line with Tony's information that LPL are cutting their 17" volume in Feb and Mar. (Please check with LPL's move)

[Shaders Lin 林靜美]

- LPL's G7.5: slowly ramping up on schedule. ~10-15K/200602.
- As we mentioned in our Jan's report, LPL have already decided to shift MNT capa to TV by dropping 17" and increasing TV 37"/32" in G6. 17"==>650K/200501,790K/200502.
- LPL is now considering to build G 5.5.

5. I heard that BOE-Hydis are shifting their 17" capacity to TV 20"VGA(100k/m), and now they are 20.1"TV price killer. SVA are also shifting their capacity to small-size TV.(Shaders help to check it!)
[Shaders Lin 林靜美]

- BOE: ~20"VGA \$205 ; volume ~80K /200512.
- 100K/M is expected in Jan'06. They intend to do max. 200K/M later on.
- SVA will MP 20"VGA in Jun'06 as well.

6. LGE people mention their demand in Jan'06 is as same as that in Dec, but they got 1 month inventory for LCD monitor sets in Hubs now. As LGE/Mr. Huang mentioned that they are trying to make 60% outsourcing(from 40% now) happened for LCD monitor panel in 2006. It also does not make any sense now if LPL can support them with volume and price at this moment.

Dear Steven,

Please help to input the market information from your collection, especially for Dell, HP, BenQ, and Philips' demand.

Dear CM, shaders

Please help to check what's the total cost and cash cost for 17" and 19" in 2nd tier vendors, and the bottom line for the 1st tier after all LCD makers declare their FIN result in Q4'05 and Jan'06. We should do the judgement about the bottom line for this down cycle.

[Shaders Lin 林靜美] First Estimation..... see in line

			2005Q4	2006Q1
15"				
1st Tier	G5	TTL Cost	\$110	\$108
1st Tier	G6	Cash Cost	\$92	\$90
2nd Tier	G7	TTL Cost	\$123	\$120
2nd Tier	G8	Cash Cost	\$105	\$102
17"				
1st Tier	G5	TTL Cost	\$141	\$137
1st Tier	G5	Cash Cost	\$118	\$115
1st Tier	G6	TTL Cost	\$144	\$138
1st Tier	G6	Cash Cost	\$124	\$119
2nd Tier	G5	TTL Cost	\$158	\$154
2nd Tier	G5	Cash Cost	\$134	\$131
19"				
1st Tier	G5	TTL Cost	\$176	\$171
1st Tier	G5	Cash Cost	\$146	\$142
1st Tier	G6	TTL Cost	\$192	\$183

1st Tier	G6	Cash Cost	\$163	\$156
2nd Tier	G5	TTL Cost	\$197	\$191
2nd Tier	G5	Cash Cost	\$166	\$161
2nd Tier	G6	TTL Cost	\$228	\$215
2nd Tier	G6	Cash Cost	\$196	\$185

Let's integrate all market information and decide how to move on for next step!

Regards,
James CP Chen

-----Original Message-----

From: WJ Cheng 鄭文俊

Sent: 2006/2/8 [星期三] 上午 11:32

To: CM Wung 翁崇銘; Shaders Lin 林靜美; Amanda Guo 郭伶玲

Cc: James CP Chen 陳建斌; Paul SL Peng 彭雙浪; Steven Leung 梁兆龍

Subject: 市場狀況概說

Dear 崇銘 & Beauties:

幾件市場訊息, 好壞都有, 提供一下參考:

1. 奇美第四季 array/cell全開, 同時也因為折舊攤提降低, 第四季利潤率會很好, 但從一月開始, 他們的主要客戶 (monitor部份)銷售皆不佳, 造成現在的存貨超過 "一個月"以上. 在元月底的時候, 已經對宏碁 17"出價 \$135, 但宏碁的銷售也超爛, 所以, 也拿不動. 另外, 從這點, 也可以瞭解到為什麼奇美幾乎都把所有的cell全部塞在唯冠了.
2. 宏碁元月不但低於 600k, 另一說法是不到 500k, 猜測僅有 450~500k 之間, 二月可見度甚至僅 300k, 跟他們在去年第四季動輒超過 800k簡直算壞透了. 這個訊息, 對於主流市場的尺寸, 恐怕是另一個殺戮的開始.
3. 奇美 17" < \$140 會虧.
4. LPL: 除先前將 19"數量下壓之外, 計劃在第一季再將 17"從原先的 1000k降至三月底時 500~600k/m的水位.
5. 華映的元月銷售中, monitor 記帳 (寄倉) 約 450k (近 40%).
6. 歐洲的一般 channel市場看起來有在恢復, 所以唯冠/代理商的銷售不錯 (或許這也是三星不錯的原因), 但相對的, 品牌銷售爛到可以, FSC第一季不買都還夠用, 宏碁的情況上面說了, 這就讓人很納悶, 平平都是monitor, 為什麼會差那麼多?

大概就醬子, 還有新的消息再連繫

謝謝囉

Tony Cheng 鄭文俊
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AU optronics
office: +886-3-5653188
e-mail: wjcheng@auo.com
mobile: +886-932-298687

AU-MDL-02829235

From: Evan Huang ¶À§öã <EvanHuang@auo.com>
Sent: Monday, February 20, 2006 2:11 AM (GMT)
To: Alice Ho |ó"q-Â <AliceHo@auo.com>; Joselyn Liu ¼B¼z§g <JoselynLiu@auo.com>;
Jerry Chen ³«B§ø <JerryChen@auo.com>; Hubert Lee §ðÄéª
<HubertLee@auo.com>; Richard Bai ¶Ö-fÀs <RichardBai@auo.com>
Cc: Michael WK Wong ¶À¶Ä±j <MichaelWKWong@auo.com>; SY Tsai ½²²±|Ð
<SYTsai@auo.com>
Subject: RE: M1 Price

Dear Alice,

Their previous commitment to Apple is to follow 14.1" price. Apple is asking CMO to offer \$120 as NTE. CMO is struggling. I'll chat with CMO these days again.

Best regards,

Evan

-----Original Message-----

From: Alice Ho |ó"q-Â
Sent: Saturday, February 18, 2006 2:00 AM
To: Evan Huang ¶À§öã; Joselyn Liu ¼B¼z§g; Jerry Chen ³«B§ø; Hubert Lee §ðÄéª; Richard Bai ¶Ö-fÀs
Cc: Michael WK Wong ¶À¶Ä±j; SY Tsai ½²²±|Ð
Subject: RE: M1 Price

Dear Evan,

We have some conclusion about the pricing to Apple, and I may talk to you tomorrow when U're available. BTW, you mentioned that CMO may quote \$155 for M1 in Mar., how about M42? Pls kindly check it.

B.RGDS,

Alice Ho
Mobile Display Business Unit
AU Optronics Corporation
Tel: +886-3-500-8800 Ext. 7712
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Fax: +886-3-579-7341
Email: aliceho @auo.com

-----Original Message-----

From: Alice Ho |ó"q-Â
Sent: Thursday, February 16, 2006 12:23 PM
To: Evan Huang ¶À§öã; Joselyn Liu ¼B¼z§g; Jerry Chen ³«B§ø; Hubert Lee §ðÄéª; Richard Bai ¶Ö-fÀs
Cc: Michael WK Wong ¶À¶Ä±j; SY Tsai ½²²±|Ð
Subject: RE: M1 Price

Dear Evan,

Thanks for the information and we will discuss here in HQ on 2/18.

B.RGDS,

Alice Ho
Mobile Display Business Unit
AU Optronics Corporation
Tel: +886-3-500-8800 Ext. 7712
Mobile: +886-920-391906
Fax: +886-3-579-7341
Email: aliceho @auo.com

-----Original Message-----

From: Evan Huang 黃煥
Sent: Thursday, February 16, 2006 12:21 PM
To: Alice Ho 何麗娟; Joselyn Liu 劉若蘭; Jerry Chen 陳志強; Hubert Lee 李國榮; Richard Bai 白耀宗
Cc: Michael WK Wong 黃偉基; SY Tsai 蔡錫
Subject: RE: M1 Price
Importance: High

Dear All,

Just got a call from CMO that they are under huge pressure from Apple so they may need to lower their price to \$155 based on 73K shipment in March.

Best regards,

Evan

-----Original Message-----

From: Evan Huang 黃煥
Sent: Wednesday, February 15, 2006 8:02 PM
To: Alice Ho 何麗娟; Joselyn Liu 劉若蘭; Jerry Chen 陳志強; Hubert Lee 李國榮; Richard Bai 白耀宗
Cc: Michael WK Wong 黃偉基; SY Tsai 蔡錫
Subject: RE: M1 Price
Importance: High

Dear all,

Forgot one thing important. LPL will start to ship 15.4" from this June for your reference.

Best regards,

Evan

-----Original Message-----

From: Evan Huang 黃煥
Sent: Wednesday, February 15, 2006 4:58 PM
To: Alice Ho 何麗娟; Joselyn Liu 劉若蘭; Jerry Chen 陳志強; Hubert Lee 李國榮; Richard Bai 白耀宗
Cc: Michael WK Wong 黃偉基; SY Tsai 蔡錫; Evan Huang 黃煥
Subject: RE: M1 Price
Importance: High

Dear all,

I talked to CMO Sales person today. Following are some information from CMO for your reference. Pls let me know if you have any questions.

1. CMO used to support 12.1" and 14.1" for iBook and PowerBook. However, Apple requested to stop shipment suddently from this month.

Currently, 15.4" and 13.3" are the only two projects working with Apple.

2. Apple did stop Samsung's 15.4" shipment at the beginning due to an inverter issue caused from system side. Up to now, Samsung already

shipped around 100K and CMO also started shipping from Feb.

3. Apple is also pushing CMO to increase volume to 100K/M for M1 but CMO doesn't really think 100K per month for one supplier is realistic.

Their target is 50K~70K shipment per month.

4. It is believed that Samusng's Feb. price is around \$165. The Sales person said CMO's Feb. price is \$162. Their current idea is to drop a few

dollars per month over following two or three months. But hope to keep at least \$160 for March at this point. However, it's not a final number

since Priya is still pushing.

5. In CMO's original M1 proposal, they committed to Apple only add up \$20 on conventional 15.4" market price as M1 price; however, they realized

actual cost at the beginning is actually higher than original estimation.

6. In CMO's original M42 proposal, they committed to Apple to follow 14.1" market price as 13.3" quote. Now, Apple is asking \$120 for 13.3" as NTE

in April since 14.1" price is dropping significantly in the market place and LPL seems to be able to offer this price. CMO said LPL makes 13.3"

and 14.1" in G5 fab.

Best regards,

Evan

-----Original Message-----

From: Alice Ho |ó-q-Á

Sent: Tuesday, February 14, 2006 10:53 PM

To: Joselyn Liu ¼B½z§g; Jerry Chen ³-«B§ø; Hubert Lee §ðÀé°a; Richard Bai ¥Ö-fÀs

Cc: Evan Huang ¶A§ðçá; Michael WK Wong ¶A¥A±j

Subject: FW: M1 Price

Dear all,
?????, Priya did not accept our offer.
Let's discuss again.

B.RGDS,

Alice Ho
Mobile Display Business Unit
AU Optronics Corporation
Tel: +886-3-500-8800 Ext. 7712
Mobile: +886-920-391906
Fax: +886-3-579-7341
Email: aliceho @auo.com

-----Original Message-----

From: Priya Balasubramaniam [mailto:priyab@apple.com]
Sent: Wednesday, February 15, 2006 1:59 PM
To: Evan Huang ¶À§õã
Cc: prathore@apple.com; Michael WK Wong ¶À¥Ã±j; Alice Ho |õ`q-Â
Subject: Re: M1 Price

Evan,

As you are aware we are actually buying these panels today from 2 other suppliers. Our price is Feb is far less than \$165. I am surprised at the 430 premium as with all our other suppliers the premium is ~50% of \$30. The fair price for this panel in March is \$145. We understand that customers in Texas are buying this panel from Number 1 and Number 2 LCD suppliers at \$125 this month. We want AUO to be fair.

Regards
Priya

On Feb 14, 2006, at 9:48 PM, EvanHuang@auo.com wrote:

> Hi, Priya and Praveen
>
> We had long discussion with Taiwan tonight on your M1 target price
> \$145 in March. This number actually quite
> surprised our team since it's really too much lower than what
> it should be from our understanding. That's true NB
> display price is coming down from this quarter; however, the pace
> actually is slow and steady. According to other
> business cases we are working, we believe conventional 15.4" should
> be around \$135 in March and around \$30
> premium is necessary for M1 spec upgarde. As a result, we would like
> to propose \$165 for M1 March price. Thanks
> for your confirmation.

>
> Best regards,

>
> Evan Huang

> AUO America Office

> Desk: (408) 239-4038
> Mobile: (408) 636-3985

>
>

Regards
Priya

Trial Exhibit 106T

From: Steven Leung ±ç¥üÅs
Sent: Thursday, April 20, 2006 3:53:49 PM
To: DS00 ~°È±@³B
Subject: URGENT -- NEED Sales 1 Support

Attachments: MAY Bottom Pricing 2005-04-18.ppt

Dear Team,

I will meet with DTBU management team on Monday PM to discuss bottom-line pricing rule for May. Please provide any input you may have for competitor market price quotations to Nero/Mandy for consolidation. Or if you have PowerPoint slide format, please provide to me directly. Thanks.

Dear Jason,

Please work with Promate to give me one (or more) presentation page on market status of down-grade pricing as well as customer requests if any. Not just April as we discussed during Promate dinner but also projection for May. Thanks.

Dear Nero/Mandy,

See Attachment for SAMPLE -- I only need competitor pricing info (in words description or table form are both OK). Please consolidate all available information onto one PowerPoint slide (or as many slides as you need but keep it simple). I hope to receive by Sunday evening. Thanks in advance.

Best Regards,
Steven



MAY Bottom
Pricing
2005-04-18.ppt
(822 kB)

UNITED STATES DISTRICT COURT NORTHERN DISTRICT OF CALIFORNIA CR-09-0110 SI	
Government Exhibit #:	<u>106T</u>
Date Admitted:	_____
By:	_____ (Deputy Clerk)

May Bottom Pricing Strategy

Internal Discussion

Tony WJ Cheng & Steven Leung

Sales Division 1 & 2 – DDBG

April 18, 2005

DDBG April MTD Bottom-Line Status

Revenue Difference Information **DD (2005/4/1 ~ 2005/4/17)**

Owner_Group	Model_Size	Ship_Qty(PCs)	Bottom_Revenue(USD)	Bottom_ASP	YTD Credit
DS00	15	48,300	227,300	4.71	2,468,552
DS00	17	76,979	158,295	2.06	-2,221,296
DS00	19	55,337	14,225	0.26	2,864,228
DS00	20.1	6,221	45,670	-7.34	-639,704
Account Team 1		186,837	354,150	1.9	2,407,991
DT00	15	1,000	5,000	5	66,460
DT00	17	26,791	96,597	3.61	961,505
DT00	19	121,450	4,400,431	36.23	2,620,599
DT00	20.1	1,833	-25,730	-14.04	-114,338
DT00	23	24	-14,785	-616.04	15,693
Account Team 2		151,098	4,461,513	29.53	3,552,419
SB00	20.1	25	-500	-20	-500
Account Team 3		25	-500	-20	-500
Total		337,960	4,815,163	14.25	5,963,227



AUO Proprietary & Confidential

AU-MDL-08416995 (T)

April Pricing Status – Tier 1 Brands

Customer	Size	Model & Version	Jan-05	Feb-05	Mar-05	Apr-05
DELL	15"	XN07.1-Z (BenQ)	137	135	132	132
	17"	EG01.0-Z (Liteon)	157	156	156	160
	17"	EG01.1-Z (BenQ)	157	156	156	160
	19" TN	EN04.2-Z (Philips)	240	230	220	220
	19" VA	EN03.1-Z (Liteon)	250	250	243	240
HP	15"	XN07.1 (BenQ/Liteon)	138	135	132	132
	17"	EG01.1 (BenQ/Liteon)	157	157	159	159
	19" TN	EN04 (TPV/Liteon)	240	231	220	220
	19" VA	EN03.1-Z (BenQ)	258	250	243	240
	19" VA-OD	EN03.0-Z (BenQ)	268	260	253	250
BenQ	20.1"	UN02.3 (Philips)	400	375	365	355
	15"	XN07.1-P	125	120	120	120
	17"	EG01.1/O	152	152	153	155
	17" 8ms	EG01.2	155	152	153	157
	19" TN	EN04.2-P	220	215	215	215

Notes:

1. AUO 17" for DELL APR pricing of \$160 masks NET pricing of \$157 versus \$156-MAR.
2. AUO 17" for Phillips APR pricing increased to \$160 versus \$157-MAR.
3. AUO 17" for BenQ APR pricing increased to \$155 versus \$153-MAR (16/12ms versions).
4. AUO 17" for BenQ APR pricing increased to \$157 versus \$153-MAR (8ms version).
5. Reference 17" competitor APR pricing to DELL:
 - AMLCD maintains \$155-MAR pricing into APR.
 - LPL maintains \$160-MAR (NET \$158) pricing into APR.
 - CPT APR pricing of \$163 (NET \$157 – same as AUO).

AUO Proprietary & Confidential



LPL Pricing Status - TPV View

Size	Type	Price	adder	MP	Thick	Bright	R/T	C/R	Remark
17"	LM170E01-CS/A6	160	+0	∅	17	250	12	500:1	LVDS, Tco'03, PSWG
	LM170E01-TL05/6/7/8	160	+0	Apr	17	250	8	600:1	LVDS, Tco'03, PSWG
	LM170E01-TL08	160	+0	∅	17	300	12	500:1	LVDS, Tco'03, PSWG, Glare
	LM170E01	160	+0	∅	17	400	12	500:1	LVDS, Tco'03, PSWG, Glare
	LM170E02	160	+0	∅	12.8	250	12	500:1	LVDS, Tco'03
	LM170E03	165	+5	Mar	17	250	8	600:1	LVDS, Tco'03, PSWG
	LM170E03	165	+5	May	17	450	8	600:1	LVDS, Tco'03, PSWG
	LM170E04	165	+5	May	12.8	300	8	600:1	LVDS, Tco'03, Slim
	LM171W02	175	+15	∅	11	200	25	400:1	TMDS, WXGA+(1440*900)
	LM190E02-A4	260	+0	∅	20	250	25	500:1	LVDS, SXGA, Tco'03
19"	LM190E02-B4	260	+0	∅	20	270	25	500:1	LVDS, SXGA, Tco'03
	LM190E03(MRVA)	225	+0	∅	20	400	16	500:1	LVDS, SXGA, Tco'03
	LM190E03(glare option)	230	+5	∅	20	250	12	500:1	LVDS, SXGA, Tco'03, Glare
	LM190E03(MEMGlare)	235	+10	∅	20	400	12	500:1	LVDS, SXGA, Tco'03
	LM190E07-TL02	245	+0	May	16.5	300	8	700:1	LVDS, SXGA, Tco'03, Glare
	LM190E07(MEMGlare)	245	+0	Q3	16.5	450	8	700:1	LVDS, SXGA, Tco'03, Glare
	LM190E05-SL01	250	+0	Jan	15.5	250	18	600:1	LVDS, SXGA, Tco'03
	LM190E05-SL02	250	+0	Jan	15.5	280	18	600:1	LVDS, SXGA, Tco'03
	LM201W01	365	+0	∅	23.7	250	16	400:1	TMDS, WSXGA+(1680*1050), Tco'03
	LM201W01-B5	365	+0	∅	23.7	300	16	600:1	LVDS, WSXGA+(1680*1050), Tco'03
20.1W	LM201W01(Upgrade)	380	+15	Jul	23.7	300	12	800:1	LVDS, WSXGA+(1680*1050), Tco'03
	LM201WE2(Glare)	380	+15	Q1	36.9	450	16	600:1	LVDS, WSXGA+(1680*1050), Tco'03
	LM201WE2(Glare)	380	+15	Aug	36.9	450	12	800:1	LVDS, WSXGA+(1680*1050), Tco'03
	LM201WE2(AI)	380	+15	Q2	36.9	450	12	1200:1	LVDS, WSXGA+(1680*1050), Tco'03
	LM230W02-A2	800	+0	∅	41	250	12(GIG)	500:1	TMDS, 1920*1200, Tco'03
	LM230W03	850	+50	Aug	41	500/300	12	800:1	LVDS, 1920*1200, Tco'03



AUO Proprietary & Confidential

AU-MDL-08416997 (T)

AMLCD Pricing Status - TPV View

Size	Type	Price	adder	MP	Thick	Bright	R/T	C/R	Remark
17"	LTM170EU-L11	157	+0	✓	17.5	300	12	500:1	LVDS, Tco'03, PSWG
	LTM170EU-L15	157	+0	✓	17.5	400	12	500:1	LVDS, Tco'03, PSWG, Glare
	LTM170EU-L21	157	+0	✓	17.5	300	8	700:1	LVDS, Tco'03, PSWG
	LTM170EX-I01	157	+0	✓	13.3	270	12	700:1	LVDS, Tco'03 (Mar.:8ms, 700:1)
	LTM170EX-L21	157	+0	Feb/E	13.3	300	8	700:1	LVDS, Tco'03
	LTM170E8-I01	172	+15	✓	13.3	280	25	1000:1	LVDS, Tco'03
	LTM170E8-L02	187	+30	✓	13.3	250	25	1000:1	LVDS, Tco'03
	LTM170E8-L03	202	+45	✓	16.5	280	12(GIG)	1000:1	LVDS, Tco'03
	LTM190E4-I01	245	+15	✓	18	250	20	500:1	LVDS, SXGA, Tco03
	LTM190E4-L02	260	+30	✓	18	250	20	600:1	LVDS, SXGA, Tco03
19"	LTM190E4-L03	275	+45	✓	20.5	280	12(GIG)	1000:1	LVDS, SXGA, Tco03
	LTM190EX-L01	230	+0	✓	17	300	8	700:1	LVDS, SXGA, Tco03
19"W	LTM190M2-L01	245	+15	Apr:	18.5	300	8	700:1	LVDS, WXGA+(1440*900)
20.1"	LTM201U1-L01	380		✓	25	280	12(GIG)	700:1	LVDS, UXGA
	LTM213U4-L01			✓	26	250	25		LVDS, UXGA
21.3"	LTM213U6-L01	550		Q1	22	300	12(GIG)	800:1	LVDS, UXGA
	LTM210M2-L01	365		Q1	22.5	300	16	900:1	WSXGA+(1680*1050)
21"W	LTM240M1-L01	560		Dec/E '04	36.5	500	16	1000:1	LVDS, 1920*1200, Tco'03
24"W	LTM240M2	560		SEP	36.5	500	8	1000:1	LVDS, 1920*1200, Tco'03



CPT Pricing Status - TPV View

Size	Model	Brand	Qty	Price	Remark
15"	XP01	TPV	5,220	\$117	
	XP01 L	DELL	25,090	\$117	DeLL @ 128.- Waiting for CPT sorting
	XP02	TPV	3,040	\$115	
	XP02 HP	HP	3,960	\$115	Specifications waiting for HP confirmation
	XG08	TPV Brazil	3,540 1,500	\$108 \$108	
15" Total			42,350		
17"	EA02 Q	OIPV	12,000	\$155.5	
	EA02	TPV	4,840	\$155.5	
		Brazil	1,600	\$163.5	Transport Fee +8
	EA03 Q	TPVW	11,040	\$153.5	
		SONY	22,080	\$155.5	
	EA07	DELL	7,000	\$155.5	DeLL @ 158.-
		OIPV	14,300	\$155.5	
		TPV	4,000	\$155.5	
		Y	3,040	\$130.5	
	17" Total			79,900	
19"	EA03	Acer	8,820	\$210	
March Total			131,070		



AUO Proprietary & Confidential

AU-MDL-08416999 (T)

DELL-TPV Demand & HUB Status

DELL SHIPMENT & FORECAST in TPV (1H 2005)

- JAN: 15"/106k, 17"/60k, 19"/7k, total 173k
- FEB: 15"/52k, 17"/100k, 19"/58k, total 210k
- MAR: 15"/120k, 17"/152k, 19"/45k, total 317k
- APR(F): 15"/160K, 17"/173K, 19"/100K, total 433k
- MAY(F): 15"/144K, 17"/184K, 19"/81K, total 409k
- JUN(F): 15"/131K, 17"/200K, 19"/120K, total 451k

DELL HUB Stock Status in TPV - April 15th View

- 15"/65k (include sea transit total as 170k)
- 17"/43k (include sea transit total as 196k)
- 19"/33k (include sea transit total as 93k)



AMLCD/LPL Intentions - REAL?

DELL Competitor APR~MAY Pricing Review & AUO Proposal
 Version: 2005-04-18 (VINCENT CHENG - AUO America)

LCD Vendor	Size/Model	APR-05	MAY-05	Remark
LPL	15"	\$ 135	\$ 140	+\$5
	17"	\$160(\$158)	\$ 163	+\$5
	19" TN	\$ 220	\$ 225	+\$5
AMLCD	15"	\$ 133	\$ 138	+\$5
	17"	\$ 155	\$ 160	+\$5
	19" TN	\$ 218	\$220~223	+\$2~5
	19" VA	\$ 248	\$250~253	+\$2~5

- **AMLCD & LPL to raise pricing by US\$5 for all sizes?**
- **GREAT NEWS but may need more information cross alignment.**
- **How real especially in mid-Q2?**
- **Inclusive of DELL masking conditions?**



AU-MDL-08417001 (T)

May Pricing Proposals - DELL

LCD Vendor	Size/Model	APR-05	MAY-05	Remark
LPL	15"	\$ 135	\$ 140	+\$5
	17"	\$160(\$158)	\$ 163	+\$5
	19" TN	\$ 220	\$ 225	+\$5
AMLCD	15"	\$ 133	\$ 138	+\$5
	17"	\$ 155	\$ 160	+\$5
	19" TN	\$ 218	\$220~223	+\$2~5
GPT	19" VA	\$ 248	\$250~253	+\$2~5
	15"	\$ 128	\$ 133	+\$5
CMO	17"	\$163(\$157)	\$ 162	+\$5
	17"	\$ 150	\$ 160	Target +\$10
AUO-MAY PROPOSAL	15"	\$ 132	\$ 137	+\$5
	17"	\$160(\$157)	\$ 162	+\$5
	19" TN	\$ 220	\$ 225	+\$5
	19" VA	\$ 240	\$ 248	+\$8
	20.1" Wide	\$ 335	\$ 335	FLAT

- Aligned towards GENERAL CONSENSUS among competitors for 15"/17"/19" PRICING INCREASES in MAY.
- Proposal for AUO MAY pricing increase for 19" VA in order to narrow gap versus AMLCD targeted \$250~253 but with balanced consideration for TAM volume priority at DELL.
- Proposal for 19" TN pricing alignment with LPL (up to \$225).
- AUO pricing finalization by 4/18 for release of quotation to DELL.
- NEED strategy to recover \$3 masked 17" APR pricing gap.



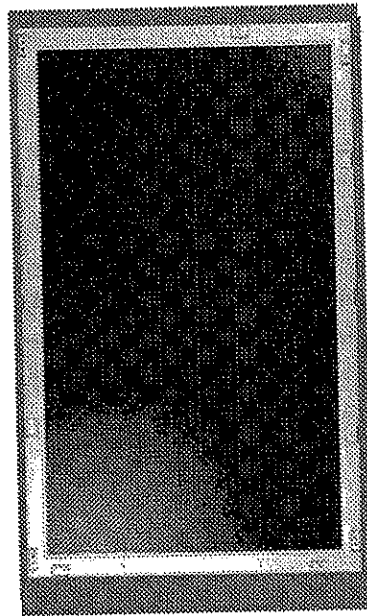
Competitor Pricing - Down-Grade

P/N	AUO	CMO	CPT	Hannstar	QDI	Innolux	Toppoly
15" (N)	105	105	100	105			
15" (V)	96	95	90	85			
17" (N)	146	145	145	143	140	140	140
17" (V)	128		125	122	120	120	125
19" (N)	200	200	195	190			
19" (V)	177	178	170	165			



AU-MDL-08417003 (T)

AUO Proprietary & Confidential



Size	Type	Price	adder	MP	Thick	Bright	R/T	C/R	Remark
17"	LM170E01-GS/A6	160	+0	ν	17	250	12	500:1	LVDS,Tco'03,PSWG
	LM170E01-TL05/6/7/8	160	+0	Apr	17	250	8	600:1	LVDS,Tco'03,PSWG
	LM170E01-TL08	160	+0	ν	17	300	12	500:1	LVDS,Tco'03,PSWG,Glare
	LM170E01	160	+0	ν	17	400	12	500:1	LVDS,Tco'03,PSWG,Glare
	LM170E02	160	+0	ν	12.8	250	12	500:1	LVDS,Tco'03
	LM170E03	165	+5	Mar	17	250	8	600:1	LVDS,Tco'03,PSWG
	LM170E03	165	+5	May	17	450	8	600:1	LVDS,Tco'03,PSWG
	LM170E04	165	+5	May	12.8	300	8	600:1	LVDS,Tco'03,Slim
17"W	LM171W02	175	+15	ν	11	200	25	400:1	TMDS,WXGA+(1440*900)
19"	LM190E02-A4	260	+0	ν	20	250	25	500:1	LVDS,SXGA,Tco'03
	LM190E02-B4	260	+0	ν	20	270	25	500:1	LVDS,SXGA,Tco'03
	LM190E03(MFM)	225	+0	ν	20	400	16	500:1	LVDS,SXGA,Tco'03
	LM190E03(glare option)	230	+5	ν	20	250	12	500:1	LVDS,SXGA,Tco'03
	LM190E03(MFM/Glare)	235	+10	ν	20	400	12	500:1	LVDS,SXGA,Tco'03,Glare
	LM190E07-TL02	245	+0	May	16.5	300	8	700:1	LVDS,SXGA,Tco'03,PSWG
	LM190E07(MFM/Glare)	245	+0	Q3	16.5	450	8	700:1	LVDS,SXGA,Tco'03,Glare
	LM190E05-SL01	250	+0	Jan	15.5	250	18	600:1	LVDS,SXGA,Tco'03
19"	LM190E05-SL02	250	+0	Jan	15.5	280	18	600:1	LVDS,SXGA,Tco'03
20.1W	LM201W01	365	+0	ν	23.7	250	16	400:1	TMDS,WSXGA+(1680*1050),Tco'03
	LM201W01-B5	365	+0	ν	23.7	300	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201W01(Upgrade)	380	+15	Jul	23.7	300	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(Glare)	380	+15	Q1	36.9	450	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(Glare)	380	+15	Aug	36.9	450	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(AD)	380	+15	Q2	36.9	450	12	1200:1	LVDS,WSXGA+(1680*1050),Tco'03
23"W	LM230W02-A2	800	+0	ν	41	250	12(GTG)	500:1	TMDS,1920*1200,Tco'03
	LM230WU3	850	+50	Aug	41	500/300	12	800:1	LVDS,1920*1200,Tco'03

Size	Type	Price	Price Difference	MP	Thickness	Brightness	Response	C/R	Remark
17"	LTM170EU-L11	157	+0	ν	17.5	300	12	500:1	LVDS,Tco'03,PSWG
	LTM170EU-L15	157	+0	ν	17.5	400	12	500:1	LVDS,Tco'03,PSWG,Glare
	LTM170EU-L21	157	+0	ν	17.5	300	8	700:1	LVDS,Tco'03,PSWG
	LTM170EX-L01	157	+0	ν	13.3	270	12	700:1	LVDS,Tco'03(Mar.:8ms,700:1)
	LTM170EX-L21	157	+0	Feb/E	13.3	300	8	700:1	LVDS,Tco'03
	LTM170E8-L01	172	+15	ν	13.3	280	25	1000:1	LVDS,Tco'03
	LTM170E8-L02	187	+30	ν	13.3	250	25	1000:1	LVDS,Tco'03
	LTM170E8-L03	202	+45	ν	16.5	280	12(GTG)	1000:1	LVDS,Tco'03
19"	LTM190E4-L01	245	+15	ν	18	250	20	500:1	LVDS,SXGA,Tco03
	LTM190E4-L02	260	+30	ν	18	250	20	600:1	LVDS,SXGA,Tco03
	LTM190E4-L03	275	+45	ν	20.5	280	12(GTG)	1000:1	LVDS,SXGA,Tco03
	LTM190EX-L01	230	+0	ν	17	300	8	700:1	LVDS,SXGA,Tco03
19"W	LTM190M2-L01	245	+15	Apr.	18.5	300	8	700:1	LVDS,WXGA+(1440*900)
20.1"	LTM201U1-L01	380		ν	25	280	12(GTG)	700:1	LVDS,UXGA
21.3"	LTM213U4-L01			ν	26	250	25		LVDS,UXGA
	LTM213U6-L01	550		Q1	22	300	12(GTG)	800:1	LVDS,UXGA
21"W	LTM210M2-L01	365		Q1	22.5	300	16	900:1	WSXGA+(1680*1050)
24"	LTM240M1-L01	560		Dec/E '04	36.5	500	16	1000:1	LVDS,1920*1200,Tco'03
	LTM240M2	560		SEP	36.5	500	8	1000:1	LVDS,1920*1200,Tco'03

Type	Mar. plan	Total	Price	Remark
15" X6	TPV	5,220	\$117	
15" X6	DELL	25,090	\$117	Dell @ 128.-
15" X6	TPV	3,040	\$115	Waiting for CPT sorting
15" X6	HP	3,960	\$115	Specification waiting for HP confirmation
15" X6	TPV	3,540	\$108	
15" X6	Brazil	1,500	\$108	
15" Total		42,350		

17"EA	OTPV	12,000	\$155.5	
17"EA	TPV	4,840	\$155.5	
17"EA	Brazil	1,600	\$163.5	Transport fee + 8
17"EA	TPVV	11,040	\$153.5	
17"EA	SONY	22,080	\$155.5	
	DELL	7,000	\$155.5	Dell @ 158.-
	OTPV	14,300	\$155.5	
	TPV	4,000	\$155.5	
	Y	3,040	\$130.5	
17" Total		79,900		

19"EA	Acer	8,820	\$210	
March Total		#####		

Size	Type	Price	Price Difference	MP	Thickness	Brightness	Response	C/R	Remark
17"	LM170E01-G5/A6	160	+0	v	17	250	12	500:1	LVDS,Teo'03,PSWG
	LM170E01-TL05/6/7/8	160	+0	Apr	17	250	8	600:1	LVDS,Teo'03,PSWG
	LM170E01-TL08	160	+0	v	17	300	12	500:1	LVDS,Teo'03,PSWG,Glare
	LM170E01	160	+0	v	17	400	12	500:1	LVDS,Teo'03,PSWG,Glare
	LM170E02	160	+0	v	12.8	250	12	500:1	LVDS,Teo'03
	LM170E03	165	+5	Mar	17	250	8	600:1	LVDS,Teo'03,PSWG
	LM170E03	165	+5	May	17	450	8	600:1	LVDS,Teo'03,PSWG
17"W	LM170E04	165	+5	May	12.8	300	8	600:1	LVDS,Teo'03,Slim
17"W	LM171W02	175	+15	v	11	200	25	400:1	TMDS,WXGA+(1440*900)
19"	LM190E02-A4	260	+0	v	20	250	25	500:1	LVDS,SXGA,Teo'03
	LM190E02-B4	260	+0	v	20	270	25	500:1	LVDS,SXGA,Teo'03
	LM190E03(MFM)	225	+0	v	20	400	16	500:1	LVDS,SXGA,Teo'03
	LM190E03(glare option)	230	+5	v	20	250	12	500:1	LVDS,SXGA,Teo'03
	LM190E03(MFM/Glare)	235	+10	v	20	400	12	500:1	LVDS,SXGA,Teo'03,Glare
	LM190E07-TL02	245	+0	May	16.5	300	8	700:1	LVDS,SXGA,Teo'03,PSWG
	LM190E07(MFM/Glare)	245	+0	Q3	16.5	450	8	700:1	LVDS,SXGA,Teo'03,Glare
	LM190E05-SL01	250	+0	Jan	15.5	250	18	600:1	LVDS,SXGA,Teo'03
19"	LM190E05-SL02	250	+0	Jan	15.5	280	18	600:1	LVDS,SXGA,Teo'03
0.1V	LM201W01	365	+0	v	23.7	250	16	400:1	TMDS,WSXGA+(1680*1050),Teo'03
	LM201W01-B5	365	+0	v	23.7	300	16	600:1	LVDS,WSXGA+(1680*1050),Teo'03
	LM201W01(Upgrade)	380	+15	Jul	23.7	300	12	800:1	LVDS,WSXGA+(1680*1050),Teo'03
	LM201WE2(Glare)	380	+15	Q1	36.9	450	16	600:1	LVDS,WSXGA+(1680*1050),Teo'03
	LM201WE2(Glare)	380	+15	Aug	36.9	450	12	800:1	LVDS,WSXGA+(1680*1050),Teo'03
	LM201WE2(AI)	380	+15	Q2	36.9	450	12	1200:1	LVDS,WSXGA+(1680*1050),Teo'03
23"W	LM230W02-A2	800	+0	v	41	250	12(GTG)	500:1	TMDS,1920*1200,Teo'03
	LM230WU3	850	+50	Aug	41	500/300	12	800:1	LVDS,1920*1200,Teo'03

Size	Type	Price	Price Difference	MP	Thickness	Brightness	Response	C/R	Remark
17"	LTM170EU-L11	157	+0	v	17.5	300	12	500:1	LVDS,Teo'03,PSWG
	LTM170EU-L15	157	+0	v	17.5	400	12	500:1	LVDS,Teo'03,PSWG,Glare
	LTM170EU-L21	157	+0	v	17.5	300	8	700:1	LVDS,Teo'03,PSWG
	LTM170EX-L01	157	+0	v	13.3	270	12	700:1	LVDS,Teo'03(Mar.-8ms,700:1)
	LTM170EX-L21	157	+0	Feb/E	13.3	300	8	700:1	LVDS,Teo'03
	LTM170E8-L01	172	+15	v	13.3	280	25	1000:1	LVDS,Teo'03
	LTM170E8-L02	187	+30	v	13.3	250	25	1000:1	LVDS,Teo'03
	LTM170E8-L03	202	+45	v	16.5	280	12(GTG)	1000:1	LVDS,Teo'03
19"	LTM190E4-L01	245	+15	v	18	250	20	500:1	LVDS,SXGA,Teo'03
	LTM190E4-L02	260	+30	v	18	250	20	600:1	LVDS,SXGA,Teo'03
	LTM190E4-L03	275	+45	v	20.5	280	12(GTG)	1000:1	LVDS,SXGA,Teo'03
	LTM190EX-L01	230	+0	v	17	300	8	700:1	LVDS,SXGA,Teo'03
9"W	LTM190M2-L01	245	+15	Apr.	18.5	300	8	700:1	LVDS,WXGA+(1440*900)
20.1"	LTM201U1-L01	380		v	25	280	12(GTG)	700:1	LVDS,UXGA
21"	LTM213U4-L01			v	26	250	25		LVDS,UXGA
3"	LTM213U6-L01			Q1	22	300	12(GTG)	800:1	LVDS,UXGA
21"W	LTM210M2-L01	365		Q1	22.5	300	16	900:1	WSXGA+(1680*1050)
24"	LTM240M1-L01	560		Dec/E '04	36.5	500	16	1000:1	LVDS,1920*1200,Teo'03
W	LTM240M2	560		SEP	36.5	500	8	1000:1	LVDS,1920*1200,Teo'03

Type	Mar. plan	Total	Price	Remark
15" X	TPV	5,220	\$117	
15" X	DELL	25,090	\$117	Dell @ 128.-
15" X	TPV	3,040	\$115	Waiting for CPT sorting
15" X	HP	3,960	\$115	Specification waiting for HP confirmation
15" X	TPV	3,540	\$108	
15" X	Brazil	1,500	\$108	
15" Total		42,350		

0				
17"E	OTPV	12,000	\$155.5	
17"E	TPV	4,840	\$155.5	
17"E	Brazil	1,600	\$163.5	Transport fee + 8
17"E	TPVW	11,040	\$153.5	
17"E	SONY	22,080	\$155.5	
	DELL	7,000	\$155.5	Dell @ 158.-
	OTPV	14,300	\$155.5	
	TPV	4,000	\$155.5	
17"	Y	3,040	\$130.5	
17" Total		79,900		

0				
19"E	Acer	8,820	\$210	
0				
March Total		#####		

Summary

Size	Type	Price	adder	MP	Thick	Bright	R/T	C/R	Remark
17"	LM170E01-G5/A6	160	+0	ν	17	250	12	500:1	LVDS,Tco'03,PSWG
	LM170E01-TL05/G7/8	160	+0	Apr	17	250	8	600:1	LVDS,Tco'03,PSWG
	LM170E01-TL08	160	+0	ν	17	300	12	500:1	LVDS,Tco'03,PSWG,Glare
	LM170E01	160	+0	ν	17	400	12	500:1	LVDS,Tco'03,PSWG,Glare
	LM170E02	160	+0	ν	12.8	250	12	500:1	LVDS,Tco'03
	LM170E03	165	+5	Mar	17	250	8	600:1	LVDS,Tco'03,PSWG
	LM170E03	165	+5	May	17	450	8	600:1	LVDS,Tco'03,PSWG
17"W	LM171W02	175	+15	ν	11	200	25	400:1	TMDS,WSXGA+(1440*900)
	LM190E02-A4	260	+0	ν	20	250	25	500:1	LVDS,SXGA,Tco'03
19"	LM190E02-B4	260	+0	ν	20	270	25	500:1	LVDS,SXGA,Tco'03
	LM190E03(MFM)	225	+0	ν	20	400	16	500:1	LVDS,SXGA,Tco'03
	LM190E03(glare option)	230	+5	ν	20	250	12	500:1	LVDS,SXGA,Tco'03
	LM190E03(MFM/Glare)	235	+10	ν	20	400	12	500:1	LVDS,SXGA,Tco'03,Glare
	LM190E07-TL02	245	+0	May	16.5	300	8	700:1	LVDS,SXGA,Tco'03,PSWG
	LM190E07(MFM/Glare)	245	+0	Q3	16.5	450	8	700:1	LVDS,SXGA,Tco'03,Glare
	LM190E05-SL01	250	+0	Jan	15.5	250	18	600:1	LVDS,SXGA,Tco'03
	LM190E05-SL02	250	+0	Jan	15.5	280	18	600:1	LVDS,SXGA,Tco'03
20.1W	LM201W01	365	+0	ν	23.7	250	16	400:1	TMDS,WSXGA+(1680*1050),Tco'03
	LM201W01-B5	365	+0	ν	23.7	300	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201W01(Upgrade)	380	+15	Jul	23.7	300	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(Glare)	380	+15	Q1	36.9	450	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(Glare)	380	+15	Aug	36.9	450	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(AD)	380	+15	Q2	36.9	450	12	1200:1	LVDS,WSXGA+(1680*1050),Tco'03
23"W	LM230W02-A2	800	+0	ν	41	250	12(GTG)	500:1	TMDS,1920*1200,Tco'03
	LM230WU3	850	+50	Aug	41	500/300	12	800:1	LVDS,1920*1200,Tco'03

Size	Type	Price	adder	MP	Thick	Bright	R/T	C/R	Remark
17"	LTM170EU-L11	157	+0	ν	17.5	300	12	500:1	LVDS,Tco'03,PSWG
	LTM170EU-L15	157	+0	ν	17.5	400	12	500:1	LVDS,Tco'03,PSWG,Glare
	LTM170EU-L21	157	+0	ν	17.5	300	8	700:1	LVDS,Tco'03,PSWG
	LTM170EX-L01	157	+0	ν	13.3	270	12	700:1	LVDS,Tco'03(Mar.:8ms,700:1)
	LTM170EX-L21	157	+0	Feb/E	13.3	300	8	700:1	LVDS,Tco'03
	LTM170E8-L01	172	+15	ν	13.3	280	25	1000:1	LVDS,Tco'03
	LTM170E8-L02	187	+30	ν	13.3	250	25	1000:1	LVDS,Tco'03
	LTM170E8-L03	202	+45	ν	16.5	280	12(GTG)	1000:1	LVDS,Tco'03
19"	LTM190E4-L01	245	+15	ν	18	250	20	500:1	LVDS,SXGA,Tco'03
	LTM190E4-L02	260	+30	ν	18	250	20	600:1	LVDS,SXGA,Tco'03
	LTM190E4-L03	275	+45	ν	20.5	280	12(GTG)	1000:1	LVDS,SXGA,Tco'03
	LTM190EX-L01	230	+0	ν	17	300	8	700:1	LVDS,SXGA,Tco'03
19"W	LTM190M2-L01	245	+15	Apr.	18.5	300	8	700:1	LVDS,WSXGA+(1440*900)
20.1"	LTM201UI-L01	380		ν	25	280	12(GTG)	700:1	LVDS,UXGA
21.3"	LTM213U4-L01			ν	26	250	25		LVDS,UXGA
	LTM213U6-L01	550		Q1	22	300	12(GTG)	800:1	LVDS,UXGA
21"W	LTM210M2-L01	365		Q1	22.5	300	16	900:1	WSXGA+(1680*1050)
24"W	LTM240M1-L01	560		Dec/E '04	36.5	500	16	1000:1	LVDS,1920*1200,Tco'03
	LTM240M2	560		SEP	36.5	500	8	1000:1	LVDS,1920*1200,Tco'03

Type	Mar. plan	Total	Price	Remark
15" XP01	TPV	5,220	\$117	
15" XP01 L	DELL	25,090	\$117	Dell @ 128.-
15" XP02	TPV	3,040	\$115	Waiting for CPT sorting
15" XP02 F	HP	3,960	\$115	Specification waiting for HP confirmation
15" XG08	TPV	3,640	\$108	
	Brazil	1,600	\$108	
15" Total		42,350		

0				
17"EA02 Q	OTPV	12,000	\$155.5	
17"EA02	TPV	4,840	\$155.5	
	Brazil	1,600	\$163.5	Transport fee + 8
17"EA03 Q	TPVW	11,040	\$153.5	
17"EA07	SONY	22,080	\$155.5	
	DELL	7,000	\$155.5	Dell @ 158.-
	OTPV	14,300	\$155.5	
	TPV	4,000	\$155.5	
	Y	3,040	\$130.5	
17" Total		79,900		

0				
19"EA03	Acer	8,820	\$210	
0				
March Total		#####		

Original

Size	Type	Price	Price Difference	MP	Thickness	Brightness	Response	C/R	Remark
17"	LM170E01-G5/A6	160	+0	ν	17	250	12	500:1	LVDS,Tco'03,PSWG
	LM170E01-TL05/6/7/8	160	+0	Apr	17	250	8	600:1	LVDS,Tco'03,PSWG
	LM170E01-TL08	160	+0	ν	17	300	12	500:1	LVDS,Tco'03,PSWG,Glare
	LM170E01	160	+0	ν	17	400	12	500:1	LVDS,Tco'03,PSWG,Glare
	LM170E02	160	+0	ν	12.8	250	12	500:1	LVDS,Tco'03
	LM170E03	165	+5	Mar	17	250	8	600:1	LVDS,Tco'03,PSWG
	LM170E03	165	+5	May	17	450	8	600:1	LVDS,Tco'03,PSWG
17"W	LM171W02	175	+15	ν	11	200	25	400:1	TMDS,WXGA+(1440*900)
	LM190E02-A4	260	+0	ν	20	250	25	500:1	LVDS,SXGA,Tco'03
19"	LM190E02-B4	260	+0	ν	20	270	25	500:1	LVDS,SXGA,Tco'03
	LM190E03(MFM)	225	+0	ν	20	400	16	500:1	LVDS,SXGA,Tco'03
	LM190E03(glare option)	230	+5	ν	20	250	12	500:1	LVDS,SXGA,Tco'03
	LM190E03(MFM/Glare)	235	+10	ν	20	400	12	500:1	LVDS,SXGA,Tco'03,Glare
	LM190E07-TL02	245	+0	May	16.5	300	8	700:1	LVDS,SXGA,Tco'03,PSWG
	LM190E07(MFM/Glare)	245	+0	Q3	16.5	450	8	700:1	LVDS,SXGA,Tco'03,Glare
	LM190E05-SL01	250	+0	Jan	15.5	250	18	600:1	LVDS,SXGA,Tco'03
	LM190E05-SL02	250	+0	Jan	15.5	280	18	600:1	LVDS,SXGA,Tco'03
20.1W	LM201W01	365	+0	ν	23.7	250	16	400:1	TMDS,WSXGA+(1680*1050),Tco'03
	LM201W01-B5	365	+0	ν	23.7	300	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201W01(Upgrade)	380	+15	Jul	23.7	300	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(Glare)	380	+15	Q1	36.9	450	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(Glare)	380	+15	Aug	36.9	450	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(AD)	380	+15	Q2	36.9	450	12	1200:1	LVDS,WSXGA+(1680*1050),Tco'03
23"W	LM230W02-A2	800	+0	ν	41	250	12(GTG)	500:1	TMDS,1920*1200,Tco'03
	LM230WU3	850	+50	Aug	41	500/300	12	800:1	LVDS,1920*1200,Tco'03

Size	Type	Price	Price Difference	MP	Thickness	Brightness	Response	C/R	Remark
17"	LTM170EU-L11	157	+0	ν	17.5	300	12	500:1	LVDS,Tco'03,PSWG
	LTM170EU-L15	157	+0	ν	17.5	400	12	500:1	LVDS,Tco'03,PSWG,Glare
	LTM170EU-L21	157	+0	ν	17.5	300	8	700:1	LVDS,Tco'03,PSWG
	LTM170EX-L01	157	+0	ν	13.3	270	12	700:1	LVDS,Tco'03(Mar.:8ms,700:1)
	LTM170EX-L21	157	+0	Feb/E	13.3	300	8	700:1	LVDS,Tco'03
	LTM170E8-L01	172	+15	ν	13.3	280	25	1000:1	LVDS,Tco'03
	LTM170E8-L02	187	+30	ν	13.3	250	25	1000:1	LVDS,Tco'03
19"	LTM170E8-L03	202	+45	ν	16.5	280	12(GTG)	1000:1	LVDS,Tco'03
	LTM190E4-L01	245	+15	ν	18	250	20	500:1	LVDS,SXGA,Tco'03
	LTM190E4-L02	260	+30	ν	18	250	20	600:1	LVDS,SXGA,Tco'03
	LTM190E4-L03	275	+45	ν	20.5	280	12(GTG)	1000:1	LVDS,SXGA,Tco'03
19"W	LTM190EX-L01	230	+0	ν	17	300	8	700:1	LVDS,SXGA,Tco'03
	LTM190M2-L01	245	+15	Apr.	18.5	300	8	700:1	LVDS,WXGA+(1440*900)
20.1"	LTM201U1-L01	380		ν	25	280	12(GTG)	700:1	LVDS,UXGA
21.3"	LTM213U4-L01			ν	26	250	25		LVDS,UXGA
	LTM213U6-L01	550		Q1	22	300	12(GTG)	800:1	LVDS,UXGA
21"W	LTM210M2-L01	365		Q1	22.5	300	16	900:1	WSXGA+(1680*1050)
24"W	LTM240M1-L01	560		Dec/E '04	36.5	500	16	1000:1	LVDS,1920*1200,Tco'03
	LTM240M2	560		SEP	36.5	500	8	1000:1	LVDS,1920*1200,Tco'03

Type	Mar. plan	Total	Price	Remark
15" XP01	TPV	5,220	\$117	
15" XP01	DELL	25,090	\$117	Dell @ 128.-
15" XP02	TPV	3,040	\$115	Waiting for CPT sorting
15" XP02	HP	3,960	\$115	Specification waiting for HP confirmation
15" XG08	TPV	3,540	\$108	
	Brazil	1,500	\$108	
15" Total		42,350		

17"EA02	OTPV	12,000	\$155.5	
17"EA02	TPV	4,840	\$155.5	
	Brazil	1,600	\$163.5	Transport fee + 8
17"EA03	TPVW	11,040	\$153.5	
17"EA07	SONY	22,080	\$155.5	
	DELL	7,000	\$155.5	Dell @ 158.-
	OTPV	14,300	\$155.5	
	TPV	4,000	\$155.5	
	Y	3,040	\$130.5	
17" Total		79,900		

19"EA03	Acer	8,820	\$210	
March Total		#####		

Size	Size	Type	Price	adder	MP	Thick	Bright	R/T	C/R	Remark
17"	17"	LM170E01-G5/A6	160	+0	ν	17	250	12	500:1	LVDS,Tco'03,PSWG
		LM170E01-TL09/976	160	+0	Apr	17	250	8	600:1	LVDS,Tco'03,PSWG
		LM170E01-TL08	160	+0	ν	17	300	12	500:1	LVDS,Tco'03,PSWG,Glare
		LM170E01	160	+0	ν	17	400	12	500:1	LVDS,Tco'03,PSWG,Glare
		LM170E02	160	+0	ν	12.8	250	12	500:1	LVDS,Tco'03
		LM170E03	165	+5	Mar	17	250	8	600:1	LVDS,Tco'03,PSWG
		LM170E03	165	+5	May	17	450	8	600:1	LVDS,Tco'03,PSWG
7"V	17"V	LM171W02	175	+15	ν	11	200	25	400:1	TMDS,WXGA+(1440*900)
		LM190E02-A4	260	+0	ν	20	250	25	500:1	LVDS,SXGA,Tco'03
		LM190E02-B4	260	+0	ν	20	270	25	500:1	LVDS,SXGA,Tco'03
		LM190E03(M1F6)	225	+0	ν	20	400	16	500:1	LVDS,SXGA,Tco'03
		LM190E03(plus optim)	230	+5	ν	20	250	12	500:1	LVDS,SXGA,Tco'03
		LM190E03(M1F6)Glare	235	+10	ν	20	400	12	500:1	LVDS,SXGA,Tco'03,Glare
		LM190E07-TL02	245	+0	May	16.5	300	8	700:1	LVDS,SXGA,Tco'03,PSWG
19"	19"	LM190E07-TL02	245	+0	Q3	16.5	450	8	700:1	LVDS,SXGA,Tco'03,Glare
		LM190E07(Glare)	245	+0	ν	16.5	450	8	700:1	LVDS,SXGA,Tco'03,Glare
		LM190E05-SL01	250	+0	Jan	15.5	250	18	600:1	LVDS,SXGA,Tco'03
		LM190E05-SL02	250	+0	Jan	15.5	280	18	600:1	LVDS,SXGA,Tco'03
		LM201W01	365	+0	ν	23.7	250	16	400:1	TMDS,WSXGA+(1680*1050),Tco'03
		LM201W01-B5	365	+0	ν	23.7	300	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
		LM201W01(Upgrade)	380	+15	Jul	23.7	300	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
0.1V	20.1W	LM201WE2(Glare)	380	+15	Q1	36.9	450	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
		LM201WE2(Glare)	380	+15	Aug	36.9	450	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
		LM201WE2(AD)	380	+15	Q2	36.9	450	12	1200:1	LVDS,WSXGA+(1680*1050),Tco'03
		LM230W02-A2	800	+0	ν	41	250	12(GTG)	500:1	TMDS,1920*1200,Tco'03
		LM230WU3	850	+50	Aug	41	500/300	12	800:1	LVDS,1920*1200,Tco'03

Size	Size	Type	Price	adder	MP	Thick	Bright	R/T	C/R	Remark
17"	17"	LTM170EU-L11	157	+0	ν	17.5	300	12	500:1	LVDS,Tco'03,PSWG
		LTM170EU-L15	157	+0	ν	17.5	400	12	500:1	LVDS,Tco'03,PSWG,Glare
		LTM170EU-L21	157	+0	ν	17.5	300	8	700:1	LVDS,Tco'03,PSWG
		LTM170EX-L01	157	+0	ν	13.3	270	12	700:1	LVDS,Tco'03(Mar.:8ms,700:1)
		LTM170EX-L21	157	+0	Feb/E	13.3	300	8	700:1	LVDS,Tco'03
		LTM170E8-L01	172	+15	ν	13.3	280	25	1000:1	LVDS,Tco'03
		LTM170E8-L02	187	+30	ν	13.3	250	25	1000:1	LVDS,Tco'03
		LTM170E8-L03	202	+45	ν	16.5	280	12(GTG)	1000:1	LVDS,Tco'03
19"	19"	LTM190E4-L01	245	+15	ν	18	250	20	500:1	LVDS,SXGA,Tco03
		LTM190E4-L02	260	+30	ν	18	250	20	600:1	LVDS,SXGA,Tco03
		LTM190E4-L03	275	+45	ν	20.5	280	12(GTG)	1000:1	LVDS,SXGA,Tco03
		LTM190EX-L01	230	+0	ν	17	300	8	700:1	LVDS,SXGA,Tco03
9"V	19"V	LTM190M2-L01	245	+15	Apr.	18.5	300	8	700:1	LVDS,WXGA+(1440*900)
20.1"	20.1"	LTM201U1-L01	380		ν	25	280	12(GTG)	700:1	LVDS,UXGA
21.3"	21.3"	LTM213U4-L01			ν	26	250	25		LVDS,UXGA
		LTM213UG-L01	550		Q1	22	300	12(GTG)	800:1	LVDS,UXGA
11"V	21"V	LTM210M2-L01	365		ν	22.5	300	16	900:1	WSXGA+(1680*1050)
24" W	24" W	LTM240M1-L01	560		Dec/E '04	36.5	500	16	1000:1	LVDS,1920*1200,Tco'03
		LTM240M2	560		SEP	36.5	500	8	1000:1	LVDS,1920*1200,Tco'03

Size	Model	Brand	Q'ty	Price	Remark
15"	XP01	TPV	5,220	\$117	
	XP01 L	DELL	25,090	\$117	Dell @ 128.-
	XP02	TPV	3,040	\$115	Waiting for CPT sorting
	XP02 H	HP	3,960	\$115	Specification waiting for HP confirmation
	XG08	TPV	3,540	\$108	
		Brazil	1,500	\$108	
15" Total			42,350		
17"	EA02 Q	OTPV	12,000	\$155.5	
	EA02	TPV	4,840	\$155.5	
		Brazil	1,600	\$163.5	Transport fee + 8
	EA03 Q	TPVW	11,040	\$153.5	
	EA07	SONY	22,080	\$155.5	
		DELL	7,000	\$155.5	Dell @ 158.-
		OTPV	14,300	\$155.5	
TPV		4,000	\$155.5		
	Y	3,040	\$130.5		
17" Total			79,900		
19"	EA03	Acer	8,820	\$210	
March Total			131,070		

Summary

Size	Type	Price	Price Difference	MP	Thickness	Brightness	Response	C/R	Remark
17"	LM170E01-GS/A6	160	+0	ν	17	250	12	500:1	LVDS,Tco'03,PSWG
	LM170E01-TL04/V10	160	+0	Apr	17	250	8	600:1	LVDS,Tco'03,PSWG
	LM170E01-TL08	160	+0	ν	17	300	12	500:1	LVDS,Tco'03,PSWG,Glare
	LM170E01	160	+0	ν	17	400	12	500:1	LVDS,Tco'03,PSWG,Glare
	LM170E02	160	+0	ν	12.8	250	12	500:1	LVDS,Tco'03
	LM170E03	165	+5	Mar	17	250	8	600:1	LVDS,Tco'03,PSWG
	LM170E03	165	+5	May	17	450	8	600:1	LVDS,Tco'03,PSWG
17"W	LM170E04	165	+5	May	12.8	300	8	600:1	LVDS,Tco'03,Slim
	LM171W02	175	+15	ν	11	200	25	400:1	TMDS,WXGA+(1440*900)
19"	LM190E02-A4	260	+0	ν	20	250	25	500:1	LVDS,SXGA,Tco'03
	LM190E02-B4	260	+0	ν	20	270	25	500:1	LVDS,SXGA,Tco'03
	LM190E03(MF/M)	225	+0	ν	20	400	16	500:1	LVDS,SXGA,Tco'03
	LM190E03(per 440)	230	+5	ν	20	250	12	500:1	LVDS,SXGA,Tco'03
	LM190E03(2000)	235	+10	ν	20	400	12	500:1	LVDS,SXGA,Tco'03,Glare
	LM190E07-TL02	245	+0	May	16.5	300	8	700:1	LVDS,SXGA,Tco'03,PSWG
	LM190E07-TL02	245	+0	Q3	16.5	450	8	700:1	LVDS,SXGA,Tco'03,Glare
	LM190E05-SL01	250	+0	Jan	15.5	250	18	600:1	LVDS,SXGA,Tco'03
	LM190E05-SL02	250	+0	Jan	15.5	280	18	600:1	LVDS,SXGA,Tco'03
20.1W	LM201W01	365	+0	ν	23.7	250	16	400:1	TMDS,WSXGA+(1680*1050),Tco'03
	LM201W01-B5	365	+0	ν	23.7	300	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201W01(3999)	380	+15	Jul	23.7	300	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(G1e+)	380	+15	Q1	36.9	450	16	600:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(G1e+)	380	+15	Aug	36.9	450	12	800:1	LVDS,WSXGA+(1680*1050),Tco'03
	LM201WE2(A5)	380	+15	Q2	36.9	450	12	1200:1	LVDS,WSXGA+(1680*1050),Tco'03
23"W	LM230W02-A2	800	+0	ν	41	250	12(GTG)	500:1	TMDS,1920*1200,Tco'03
	LM230WU3	850	+50	Aug	41	500/300	12	800:1	LVDS,1920*1200,Tco'03

Size	Type	Price	Price Difference	MP	Thickness	Brightness	Response	C/R	Remark
17"	LTM170E0-L11	157	+0	ν	17.5	300	12	500:1	LVDS,Tco'03,PSWG
	LTM170E0-L15	157	+0	ν	17.5	400	12	500:1	LVDS,Tco'03,PSWG,Glare
	LTM170E0-L21	157	+0	ν	17.5	300	8	700:1	LVDS,Tco'03,PSWG
	LTM170EX-L01	157	+0	ν	13.3	270	12	700:1	LVDS,Tco'03(Mar.:8ms,700:1)
	LTM170EX-L21	157	+0	Feb/E	13.3	300	8	700:1	LVDS,Tco'03
	LTM170E8-L01	172	+15	ν	13.3	280	25	1000:1	LVDS,Tco'03
	LTM170E8-L02	187	+30	ν	13.3	250	25	1000:1	LVDS,Tco'03
19"	LTM170E8-L03	202	+45	ν	16.5	280	12(GTG)	1000:1	LVDS,Tco'03
	LTM190E4-L01	245	+15	ν	18	250	20	500:1	LVDS,SXGA,Tco'03
	LTM190E4-L02	260	+30	ν	18	250	20	600:1	LVDS,SXGA,Tco'03
	LTM190E4-L03	275	+45	ν	20.5	280	12(GTG)	1000:1	LVDS,SXGA,Tco'03
19"W	LTM190EX-L01	230	+0	ν	17	300	8	700:1	LVDS,SXGA,Tco'03
	LTM190M2-L01	245	+15	Apr.	18.5	300	8	700:1	LVDS,WXGA+(1440*900)
20.1"	LTM201U1-L01	380		ν	25	280	12(GTG)	700:1	LVDS,UXGA
21.3"	LTM213U4-L01			ν	26	250	25		LVDS,UXGA
	LTM213U6-L01	550		Q1	22	300	12(GTG)	800:1	LVDS,UXGA
21"W	LTM210M2-L01	365		Q1	22.5	300	16	900:1	WSXGA+(1680*1050)
24"W	LTM240M1-L01	560		Dec/E '04	36.5	500	16	1000:1	LVDS,1920*1200,Tco'03
	LTM240M2	560		SEP	36.5	500	8	1000:1	LVDS,1920*1200,Tco'03

Type	Mar. plan	Total	Price	Remark
15" XP01	TPV	5,220	\$117	
15" XP01 L	DELL	25,090	\$117	Dell @ 128.-
15" XP02	TPV	3,040	\$115	Waiting for CPT sorting
15" XP02 HP	HP	3,960	\$115	Specification waiting for HP confirmation
15" XG08	TPV	3,540	\$108	
	Brazil	1,500	\$108	
15" Total		42,350		

0				
17"EA02 Q	OTPV	12,000	\$155.5	
17"EA02	TPV	4,840	\$155.5	
	Brazil	1,600	\$163.5	Transport fee + 8
17"EA03 Q	TPVW	11,040	\$153.5	
17"EA07	SONY	22,080	\$155.5	
	DELL	7,000	\$155.5	Dell @ 158.-
	OTPV	14,300	\$155.5	
	TPV	4,000	\$155.5	
	Y	3,040	\$130.5	
17" Total		79,900		

0				
19"EA03	Acer	8,820	\$210	

0				
March Total		131,070		

Original

Trial Exhibit 107

MAY Bottom Pricing Strategy

Internal Discussion

Steven Leung

Sales Division 1

April 24, 2006

UNITED STATES DISTRICT COURT
NORTHERN DISTRICT OF CALIFORNIA
CR-09-0110 SI

Government Exhibit #: 107

Date Admitted: _____

By: _____ (Deputy Clerk)

AU-MDL-03351072

Major Tier-1 Brands APR Quote Status

Sales 1 APRIL Pricing Negotiation Status

Updated By: Steven Leung 2006-04-07

Customer	Size	JAN Pricing	FEB Pricing	MAR Pricing	APR Quotation	Customer Status
	15"	\$135 (-3)	\$125 (-10)	\$118 (-7)	\$108 (-10)	Closed
	17"	\$152 (-8)	\$143 (-9)	\$135 (-8)	\$119 (-16)	Closed
	19"TN	\$192 (-8)	\$183 (-9)	\$173 (-10)	\$157 (-16)	Closed
	15"	\$128.05	\$121.64	\$114.26	\$112	Invoice Price
	17"	\$146.27	\$138.88	\$131.99	\$129	Invoice Price
	19"TN 8ms	\$190 (-10)	\$180 (-10)	\$172 (-8)	\$165	Invoice Price
	19"VA	\$208 (-7)	\$200 (-8)	EOL	EOL	EOL
	19"VA OD	\$218 (-8)	\$210 (-8)	\$200 (-10)	\$189	Invoice Price
	15"	\$115 (-10)	\$108 (-7)	\$103 (-5)	\$103	Invoice Price
	17" 8ms	\$144 (-10)	\$135 (-9)	\$126 (-9)	\$126	Invoice Price
	19"TN 8ms	\$183 (-11)	\$175 (-8)	\$165 (-10)	\$165	Invoice Price
	15"	\$125 (-12)	\$120 (-5)	114(-6)	\$110	Open
	17"	\$145 (-15)	\$138 (-7)	130(-8)	\$128	Open
	19"TN 8ms	\$186 (-15)	\$178 (-8)	170(-8)	\$168	Open
	20"W	\$250 (Flat)	\$250 (Flat)	245(-5)	\$240	Open

Final Q1 HP Price Adjustment Confirmed:

- Net Price Closure with 1.25% advantage based on HP-AUO agreement.
- Volume Target Not Achieved for 1.5% (351K Actual vs. 378K Target 15"/17").

Competitor Pricing Trend Status

Panel Maker	Size	Jan	Feb	Mar	Apr	May
SEC	15"	\$ 150	\$ 140	\$ 133	\$ 117	\$ 112
	17"		\$ 178	\$ 170	\$ 155	\$ 153
	19"		\$ 166	\$ 162	\$ 158	\$ 148
	19"W	\$ 172	\$ 280	\$ 275		
	20.1		\$ 281	\$ 280		
	21W		\$ 510	\$ 500		
	24W		\$ 890			
LPL	15"		\$ 138	\$ 128	\$ 118	
	17"	\$ 151	\$ 180		\$ 155	
	19"	\$ 190	\$ 280	\$ 280		
	20.1"	\$ 285	\$ 270	\$ 270		
	20W	\$ 285				
	22W					
	24W					
HYDIS	30W	\$ 950	\$ 925			
	15"	\$ 145	\$ 136	\$ 168	\$ 124	
	17"	\$ 180	\$ 172		\$ 155	
	19"					
	19W					
	15"	\$ 146	\$ 132	\$ 127	\$ 120	
	17"	\$ 184	\$ 175	\$ 165	\$ 160	
CMO	19"	\$ 176	\$ 168	\$ 162	\$ 155	
	19W		\$ 230			
	20.1			\$ 240		
	20W					
	22W		\$ 275			
	24W		\$ 465			
	15"	\$ 115	\$ 110	\$ 105	\$ 102	
CPT	17"	\$ 142	\$ 132	\$ 128	\$ 120	
	19"					
	20W					
	15"	\$ 115	\$ 110	\$ 105	\$ 103	
	17"	\$ 141	\$ 137	\$ 130		
	19"	\$ 178	\$ 170	\$ 160		
	19W	\$ 175	\$ 166	\$ 158		
QDI	15"	\$ 150	\$ 140			
	17"					
	19"		\$ 235	\$ 230		
	20W		\$ 107	\$ 102		
	15"	\$ 112	\$ 132			
	17"	\$ 140				
	19"					
SVA	15"	\$ 112	\$ 107	\$ 102		
	17"	\$ 140	\$ 132			
	19"					
	15"	\$ 112	\$ 107	\$ 102		
	17"	\$ 140	\$ 132			
	19"					
	20W					

Competitor Pricing Status for HP

Panel Maker	Size	Jan	Feb	Mar	Apr
AMLCD	15"	\$ 125	\$ 115	\$ 133	\$ 119.81
	17"TN	\$ 150	\$ 140.7	\$ 143	\$ 129.81
	17" PVA	\$ 160	\$ 150.7	\$ 171	\$ 159.42
	19"TN	\$ 193	\$ 181	\$ 191	\$ 259.42
	19" PVA	\$ 213	\$ 201	\$ 271	\$ 505
	21"	\$ 293	\$ 281	\$ 505	\$ 108
	24"W	\$ 520	\$ 510	\$ 113	\$ 120
LPL	15"	\$ 133	\$ 118	\$ 133	\$ 160
	17"	\$ 150	\$ 143	\$ 171	\$ 290
	19"TN	\$ 190	\$ 182	\$ 300	
	19"IPS	\$ 210	\$ 205	\$ 500	
	20"	\$ 310	\$ 310		
	23"	\$ 500	\$ 500		
HYDIS	15"				
	17"				
	19"TN				
AUO	15"	\$ 130	\$ 123.5	\$ 116	\$ 108
	17"	\$ 148.5	\$ 141	\$ 134	\$ 125
	19"TN	\$ 190	\$ 180	\$ 172	\$ 165
	19"TN-G	\$ 207	\$ 195	\$ 186	\$ 179
	19"VA	\$ 208	\$ 200		
	19"OD	\$ 218	\$ 210	\$ 200	\$ 189
CMO	15"	\$ 150	\$ 145	\$ 133	\$ 121
	17"	\$ 195	\$ 182	\$ 172	\$ 160
	19"TN	\$ 131	\$ 124	\$ 112	\$ 108
CPT	15"	\$ 150	\$ 142	\$ 134	\$ 121
	17"	\$ 190	\$ 182	\$ 173	\$ 165
	19"TN	\$ 122	\$ 117	\$ 105	
HANNSTAR	15"	\$ 180	\$ 178		
	17"				

Competitor Pricing Trend Overview

May 17" Pricing Strategy:

AMLCD Potentially \$110 (High Inventory & Weak VD Set Sales)
LPL TBD

Samsung Already Offered to Strategic Customers Now:

17" \$112
19" \$153
PP Offered

Other Competitors' Pricing:

CMO quoted \$115/17" A grade in the market in APR
LPL 17" bottom line will be est. \$105 by MAY~JUN.
CPT <\$200 for HP new 20"W project at Tatung.

DELL MAY Target Pricing Overview

MAY Target Pricing (DELL 2006-04-20)

15": \$85 (-\$23 versus AUO April \$108, -\$10 AUO MAR~APR)

17": \$95 (-\$24 versus AUO April \$119, -\$16 AUO MAR~APR)

19"TN: \$135 (-\$22 versus AUO April \$157, -\$10 AUO MAR~APR)

20.1"W: \$225

24"W: \$415

Competitor Pricing in PHILIPS

	JAN	FEB	MAR	APR	MAY	
AUO	15"	\$ 125	\$ 120	\$ 114	\$ 105	\$ 103
	17"	\$ 145	\$ 138	\$ 130	\$ 121	\$ 118
	19"	\$ 186	\$ 178	\$ 170	\$ 159	\$ 158
	20"W	\$ 250	\$ 250	\$ 245	\$ 240	\$ 235

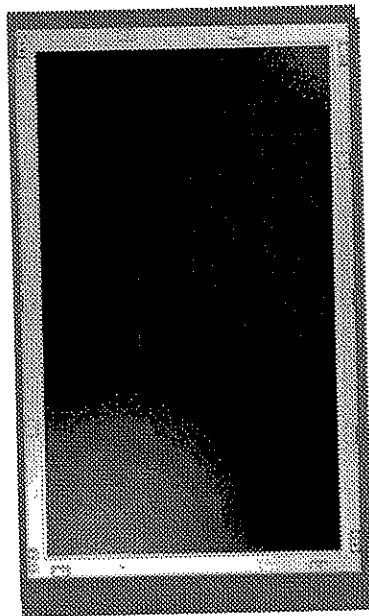
CPT	15"				\$ 102	\$ 101
	17"				\$ 120	\$ 118

LPL	15"				\$ 100	\$ 97
	17"				\$ 118	\$ 115
	19"				\$ 158	\$ 155
	20"W					

APR Down-Grade Pricing Status

P/N	Promate Request	AUO	CMO	CPT	Hannstar	GDI	Toppoly	Innox	SVA	Hydis	LPL	SEC
15" (N)	90	97		90	90	90			90			
15" (V)				80	80	75			75			
17" (N)	100	112	100	101	102	100	100	101	100	100	110	110
17" (V)			85	87	85	87	85	90	85	85	100	100
19" (N)	130	148	140	138	135						143	145
19" (V)			125	125	120						130	130
19" Wide (P)			145		143							
19" Wide (N)			130		130							
19" Wide (V)			120		115							

Source: Promate (2006-04-24)



Panel Maker	Size	Jan	Feb	Mar	Apr	May
SEC	15"					
	17"	\$ 150	\$ 140	\$ 133	\$ 117	\$ 112
	19"		\$ 178	\$ 170	\$ 155	\$ 153
	19"W	\$ 172	\$ 166	\$ 162	\$ 158	\$ 148
	20.1		\$ 280	\$ 280		
	21W		\$ 281	\$ 275		
	24W		\$ 510	\$ 500		
	30W		\$ 890			
LPL	15"					
	17"	\$ 151	\$ 138	\$ 128	\$ 118	
	19"	\$ 190	\$ 180		\$ 155	
	20.1"	\$ 285	\$ 280	\$ 280		
	20W	\$ 285	\$ 270	\$ 270		
	22W					
	24W					
	30W	\$ 950	\$ 925			
HYDIS	15"					
	17"	\$ 145	\$ 136		\$ 124	
	19"	\$ 180	\$ 172	\$ 168	\$ 155	
	19W					
CMO	15"					
	17"	\$ 146	\$ 132	\$ 127	\$ 120	
	19"	\$ 184	\$ 175	\$ 165	\$ 160	
	19W	\$ 176	\$ 168	\$ 162	\$ 155	
	20.1		\$ 230			
	20W			\$ 240		
	22W		\$ 275			
	24W		\$ 465			
CPT	15"	\$ 115	\$ 110	\$ 105	\$ 102	
	17"	\$ 142	\$ 132	\$ 128	\$ 120	
	19"					
	20W					
HAN	15"	\$ 115	\$ 110	\$ 105	\$ 103	
	17"	\$ 141	\$ 137	\$ 130		
	19"	\$ 178	\$ 170	\$ 160		
	19W	\$ 175	\$ 166	\$ 158		
QDI	15"					
	17"	\$ 150	\$ 140			
	19"					
	20W		\$ 235	\$ 230		
SVA	15"	\$ 112	\$ 107	\$ 102		
	17"	\$ 140	\$ 132			
	19"					

Panel Maker	Size	Jan	Feb	Mar	Apr
AMLCD	15"	\$ 125	\$ 115		
	17"TN	\$ 150	\$140.7	\$ 133	
	17"PVA	\$ 160	\$150.7	\$ 143	
	19"TN	\$ 193	\$ 181	\$ 171	
	19"PVA	\$ 213	\$ 201	\$ 191	
	21"	\$ 293	\$ 281	\$ 271	
	24"W	\$ 520	\$ 510	\$ 505	
LPL	15"	\$ 133	\$ 118	\$ 113	\$ 108
	17"	\$ 150	\$ 143	\$ 133	\$ 120
	19"TN	\$ 190	\$ 182	\$ 171	\$ 160
	19"IPS	\$ 210	\$ 205		
	20"	\$ 310	\$ 310	\$ 300	\$ 290
	23"	\$ 500	\$ 500	\$ 500	
HYDIS	15"				
	17"				
	19"TN				
AUO	15"	\$ 130	\$123.5	\$ 116	\$ 108
	17"	\$148.5	\$ 141	\$ 134	\$ 125
	19"TN	\$ 190	\$ 180	\$ 172	\$ 165
	19"TN-G	\$ 207	\$ 195	\$ 186	\$ 179
	19"VA	\$ 208	\$ 200		
	19"OD	\$ 218	\$ 210	\$ 200	\$ 189
CMO	15"				
	17"	\$ 150	\$ 145	\$ 133	\$ 121
	19"TN	\$ 195	\$ 182	\$ 172	\$ 160
CPT	15"	\$ 131	\$ 124	\$ 112	\$ 108
	17"	\$ 150	\$ 142	\$ 134	\$ 121
	19"TN	\$ 190	\$ 182	\$ 173	\$ 165
HANNSTAR	15"	\$ 122	\$ 117	\$ 105	
	17"				
	19"TN	\$ 180	\$ 178		

Panel Mak	Size	Jan	Feb	Mar	Apr	May
SEC	15"					
	17"	150	140	133	117	112
	19"		178	170	155	153
	19"W	172	166	162	158	148
	20.1		280(D)	280		
	21W		281(H)	275		
	24W		510	500		
	30W		890(D)			
LPL	15"					
	17"	151	138	128	118	
	19"	190	180		155	
	20.1"	85~300	80~290	280		
	20W	85~300	70~280	270		
	22W					
	30W	950	925			
HYDIS	15"					
	17"	145	136		123.5	
	19"	180	172	168	155	
	19W					
AUO	15"					
	17"	146	38/136	130	120	
	19"	180	176	170	160	
	19W					
	20.1	280	265	260	245	
	20W		235	230	215	
	22W					
	24W		515	500	495	495
CMO	15"					
	17"	146	132	127	120	
	19"	184	175	165	160	
	19W	176	168	162	155	
	20.1		230			
	20W			240		
	22W		275			
	24W		465~485			
CPT	15"	115	110	105	102	
	17"	142	132	128	120	
	19"					
	20W					
HAN	15"	115	110	105	103	
	17"	141	137	130		
	19"	178	170	160		
	19W	175	166	158		
QDI	15"					
	17"	150	140			
	19"					
	20W		235	230		
SVA	15"	112	107	102		
	17"	140	132			
	19"					

Panel Maker	Size	Jan	Feb	Mar	Apr
AMLCD	15"	\$ 125	\$ 115		
	17"TN	\$ 150	\$140.7	\$ 133	
	17"PVA	\$ 160	\$150.7	\$ 143	
	19"TN	\$ 193	\$ 181	\$ 171	
	19"PVA	\$ 213	\$ 201	\$ 191	
	21"	\$ 293	\$ 281	\$ 271	
	24"W	\$ 520	\$ 510	\$ 505	
LPL	15"	\$ 133	\$ 118	\$ 113	\$ 108
	17"	\$ 150	\$ 143	\$ 133	\$ 120
	19"TN	\$ 190	\$ 182	\$ 171	\$ 160
	19"IPS	\$ 210	\$ 205		
	20"	\$ 310	\$ 310	\$ 300	\$ 290
	23"	\$ 500	\$ 500	\$ 500	
HYDIS	15"				
	17"				
	19"TN				
AUO	15"	\$ 130	\$123.5	\$ 116	\$ 108
	17"	\$148.5	\$ 141	\$ 134	\$ 125
	19"TN	\$ 190	\$ 180	\$ 172	\$ 165
	19"TN-G	\$ 207	\$ 195	\$ 186	\$ 179
	19"VA	\$ 208	\$ 200		
	19"OD	\$ 218	\$ 210	\$ 200	\$ 189
CMO	15"				
	17"	\$ 150	\$ 145	\$ 133	\$ 121
	19"TN	\$ 195	\$ 182	\$ 172	\$ 160
CPT	15"	\$ 131	\$ 124	\$ 112	\$ 108
	17"	\$ 150	\$ 142	\$ 134	\$ 121
	19"TN	\$ 190	\$ 182	\$ 173	\$ 165
HANNSTAR	15"	\$ 122	\$ 117	\$ 105	
	17"				
	19"TN	\$ 180	\$ 178		

Panel Make	Size	Jan	Feb	Mar	Apr	May
SEC	15"					
	17"	\$ 150	\$ 140	\$ 133	\$ 117	\$ 112
	19"		\$ 178	\$ 170	\$ 155	\$ 153
	19"W	\$ 172	\$ 166	\$ 162	\$ 158	\$ 148
	20.1		\$ 280	\$ 280		
	21W		\$ 281	\$ 275		
	24W		\$ 510	\$ 500		
	30W		\$ 890			
LPL	15"					
	17"	\$ 151	\$ 138	\$ 128	\$ 118	
	19"	\$ 190	\$ 180		\$ 155	
	20.1"	\$ 285	\$ 280	\$ 280		
	20W	\$ 285	\$ 270	\$ 270		
	22W					
	24W					
	30W	\$ 950	\$ 925			
HYDIS	15"					
	17"	\$ 145	\$ 136		\$ 124	
	19"	\$ 180	\$ 172	\$ 168	\$ 155	
	19W					
CMO	15"					
	17"	\$ 146	\$ 132	\$ 127	\$ 120	
	19"	\$ 184	\$ 175	\$ 165	\$ 160	
	19W	\$ 176	\$ 168	\$ 162	\$ 155	
	20.1		\$ 230			
	20W			\$ 240		
	22W		\$ 275			
	24W		\$ 465			
CPT	15"	\$ 115	\$ 110	\$ 105	\$ 102	
	17"	\$ 142	\$ 132	\$ 128	\$ 120	
	19"					
	20W					
HAN	15"	\$ 115	\$ 110	\$ 105	\$ 103	
	17"	\$ 141	\$ 137	\$ 130		
	19"	\$ 178	\$ 170	\$ 160		
	19W	\$ 175	\$ 166	\$ 158		
QDI	15"					
	17"	\$ 150	\$ 140			
	19"					
	20W		\$ 235	\$ 230		
SVA	15"	\$ 112	\$ 107	\$ 102		
	17"	\$ 140	\$ 132			
	19"					

Panel Maker	Size	Jan	Feb	Mar	Apr
AMLCD	15"	\$ 125	\$ 115		
	17"TN	\$ 150	\$140.7	\$ 133	
	17"PVA	\$ 160	\$150.7	\$ 143	
	19"TN	\$ 193	\$ 181	\$ 171	
	19"PVA	\$ 213	\$ 201	\$ 191	
	21"	\$ 293	\$ 281	\$ 271	
	24"W	\$ 520	\$ 510	\$ 505	
LPL	15"	\$ 133	\$ 118	\$ 113	\$ 108
	17"	\$ 150	\$ 143	\$ 133	\$ 120
	19"TN	\$ 190	\$ 182	\$ 171	\$ 160
	19"IPS	\$ 210	\$ 205		
	20"	\$ 310	\$ 310	\$ 300	\$ 290
	23"	\$ 500	\$ 500	\$ 500	
HYDIS	15"				
	17"				
	19"TN				
AUO	15"	\$ 130	\$123.5	\$ 116	\$ 108
	17"	\$148.5	\$ 141	\$ 134	\$ 125
	19"TN	\$ 190	\$ 180	\$ 172	\$ 165
	19"TN-G	\$ 207	\$ 195	\$ 186	\$ 179
	19"VA	\$ 208	\$ 200		
	19"OD	\$ 218	\$ 210	\$ 200	\$ 189
CMO	15"				
	17"	\$ 150	\$ 145	\$ 133	\$ 121
	19"TN	\$ 195	\$ 182	\$ 172	\$ 160
CPT	15"	\$ 131	\$ 124	\$ 112	\$ 108
	17"	\$ 150	\$ 142	\$ 134	\$ 121
	19"TN	\$ 190	\$ 182	\$ 173	\$ 165
HANNSTAR	15"	\$ 122	\$ 117	\$ 105	
	17"				
	19"TN	\$ 180	\$ 178		

Panel Mak	Size	Jan	Feb	Mar	Apr	May
SEC	15"					
	17"	150	140	133	117	112
	19"		178	170	155	153
	19"W	172	166	162	158	148
	20.1		280(D)	280		
	21W		281(H)	275		
	24W		510	500		
	30W		890(D)			
LPL	15"					
	17"	151	138	128	118	
	19"	190	180		155	
	20.1"	85~300	80~290	280		
	20W	85~300	70~280	270		
	22W					
	24W					
	30W	950	925			
HYDIS	15"					
	17"	145	136		123.5	
	19"	180	172	168	155	
	19W					
AUO	15"					
	17"	146	38/136	130	120	
	19"	180	176	170	160	
	19W					
	20.1	280	265	260	245	
	20W		235	230	215	
	22W					
	24W		515	500	495	495
CMO	15"					
	17"	146	132	127	120	
	19"	184	175	165	160	
	19W	176	168	162	155	
	20.1		230			
	20W			240		
	22W		275			
	24W		465~485			
CPT	15"	115	110	105	102	
	17"	142	132	128	120	
	19"					
	20W					
HAN	15"	115	110	105	103	
	17"	141	137	130		
	19"	178	170	160		
	19W	175	166	158		
QDI	15"					
	17"	150	140			
	19"					
	20W		235	230		
SVA	15"	112	107	102		
	17"	140	132			
	19"					

Panel Maker	Size	Jan	Feb	Mar	Apr
AMLCD	15"	\$ 125	\$ 115		
	17"TN	\$ 150	\$140.7	\$ 133	\$119.81
	17"PVA	\$ 160	\$150.7	\$ 143	\$129.81
	19"TN	\$ 193	\$ 181	\$ 171	\$159.42
	19"PVA	\$ 213	\$ 201	\$ 191	
	21"	\$ 293	\$ 281	\$ 271	\$259.42
	24"W	\$ 520	\$ 510	\$ 505	\$ 505
LPL	15"	\$ 133	\$ 118	\$ 113	\$ 108
	17"	\$ 150	\$ 143	\$ 133	\$ 120
	19"TN	\$ 190	\$ 182	\$ 171	\$ 160
	19"IPS	\$ 210	\$ 205		
	20"	\$ 310	\$ 310	\$ 300	\$ 290
	23"	\$ 500	\$ 500	\$ 500	
HYDIS	15"				
	17"				
	19"TN				
AUO	15"	\$ 130	\$123.5	\$ 116	\$ 108
	17"	\$148.5	\$ 141	\$ 134	\$ 125
	19"TN	\$ 190	\$ 180	\$ 172	\$ 165
	19"TN-G	\$ 207	\$ 195	\$ 186	\$ 179
	19"VA	\$ 208	\$ 200		
	19"OD	\$ 218	\$ 210	\$ 200	\$ 189
CMO	15"				
	17"	\$ 150	\$ 145	\$ 133	\$ 121
	19"TN	\$ 195	\$ 182	\$ 172	\$ 160
CPT	15"	\$ 131	\$ 124	\$ 112	\$ 108
	17"	\$ 150	\$ 142	\$ 134	\$ 121
	19"TN	\$ 190	\$ 182	\$ 173	\$ 165
HANNSTAR	15"	\$ 122	\$ 117	\$ 105	
	17"				
	19"TN	\$ 180	\$ 178		

Trial Exhibit 108

From: Steven Leung 梁兆龍
Sent: Wednesday, April 26, 2006 1:43:44 AM
To: Nero Hung 洪沼源; Mandy Chen 陳世偉
CC: Roger Hu 胡永鵬; Michael WK Wong 黃永強
Subject: HP May I/V price

Dear All,

Basically the numbers seem OK. But do align with other TFT vendors to ensure we are not quoting too low or much too high. Thanks and do confirm to me the team decision and supporting reasons (as needed for any proposal you make).

Best Regards,
Steven

-----Original Message-----

From: Nero Hung 洪沼源
Sent: Wednesday, April 26, 2006 5:33 AM
To: Mandy Chen 陳世偉
Cc: Steven Leung 梁兆龍; Roger Hu 胡永鵬; Michael WK Wong 黃永強
Subject: May I/V price

Mandy:
May I/V price idea:
15" \$103
17" \$117
19" \$155

Please study it and let me know.
Tks,

Best Regards,
Nero

UNITED STATES DISTRICT COURT
NORTHERN DISTRICT OF CALIFORNIA
CR-09-0110 SI
Government Exhibit #: 108
Date Admitted: _____
By: _____ (Deputy Clerk)

ALL MDL 02730357

Trial Exhibit 109

From: Alice Ho 何秀玲 <AliceHo@auo.com>
Sent: Wednesday, April 26, 2006 3:19 AM (GMT)
To: Dominic Chen 陳豪智 <DominicChen@auo.com>; Yi An Chen 陳怡安 <YiAnChen@auo.com>
Cc: Joselyn Liu 劉慧君 <JoselynLiu@auo.com>; Hubert Lee 李燦榮 <HubertLee@auo.com>; Michael WK Wong 黃永強 <MichaelWKWong@auo.com>; Dominic Chen 陳豪智 <DominicChen@auo.com>; Richard Bai 白柏龍 <RichardBai@auo.com>
Subject: RE: Line up HP NB status to CMO !

Dear Dominic,

Thanks for the information.

Pls send us HP's offer to CMO when you are available.

B.RGEDS,

Alice Ho
Mobile Display Business Unit
AU Optronics Corporation
Tel: +886-3-500-8800 Ext. 7712
Mobile: +886-920-391906
Fax: +886-3-579-7341
Email: aliceho@auo.com

-----Original Message-----

From: Dominic Chen 陳豪智
Sent: Wednesday, April 26, 2006 6:59 AM
To: Yi An Chen 陳怡安; Alice Ho 何秀玲
Cc: Joselyn Liu 劉慧君; Hubert Lee 李燦榮; Michael WK Wong 黃永強; Dominic Chen 陳豪智; Richard Bai 白柏龍
Subject: Line up HP NB status to CMO !
Importance: High

Joanne and Alice,

This afternoon CMO Houston people was checking with me for HP May to August deal. I told them that:

1. I had a discussion with Junichi this morning and little chat with Jun Kim. HP's price target is very stiff, not a big chance to negotiate a lot. HP want me to consider about their very low price offer in exchange for some volume.
2. But I'm still trying to negotiate for few more times to see which model will have better chance to increase the price.
3. Junichi's price target for AUO is the same with CMO. Later I'll summarize HP's offer to CMO for your reference! We have to use that as HP's price target for AUO.

If CMO Taiwan's people try to double check with you, this is what I told them in Houston. We need to line up our information!

Regards,

UNITED STATES DISTRICT COURT NORTHERN DISTRICT OF CALIFORNIA CR-09-0110 SI	
Government Exhibit #:	<u>109</u>
Date Admitted:	_____
By:	_____ (Deputy Clerk)

Dominic

AU-MDL-02738597

From: Richard Bai 白柏龍 <RichardBai@auo.com>
Sent: Friday, April 28, 2006 12:52 AM (GMT)
To: Paul Peng 彭^Àù@ö <PaulPeng@auo.com>; Hui Hsiung 胡·u <HuiHsiung@auo.com>
Cc: Evan Huang 黃À§öã <EvanHuang@auo.com>; Alice Ho 何ó"q-Â <AliceHo@auo.com>;
Michael WK Wong 黃Ä±j <MichaelWKWong@auo.com>; Kevin TT Huang
黃ÀÑ¼w <KevinTTHuang@auo.com>; Hubert Lee 李§öÄé°a <HubertLee@auo.com>;
Joselyn Liu ¼B¼z§g <JoselynLiu@auo.com>; Jerry Chen ³«B§ø
<JerryChen@auo.com>; SY Tsai ½²²±|Đ <SYTsai@auo.com>
Subject: RE: NY project information update

Dear Paul and Kuma,

The final price we negotiated with NY is \$136 which is \$1 more than their bottom line.

From Evan and our sources, NY did put AUO as a major supplier in both 15.4" and 13.3" projects. But we will watch their demand pattern and manage the risk of sudden change. Thanks for your comments.

Regards,

Richard

From: Evan Huang 黃杏文
Sent: Friday, April 28, 2006 8:46 AM
To: Alice Ho 何秀玲; Michael WK Wong 黃永強; Kevin TT Huang 黃天德; Hubert Lee 李燦榮; Joselyn Liu 劉慧君; Jerry Chen 陳雨村; SY Tsai 蔡盛羽; Richard Bai 白柏龍
Subject: NY project information update

Dear All,

Some information from CMO.

玉山 (15.4):

1. CMO will ship 10K at \$130 today.
2. Not close May price and volume yet. Expect May price should be max. \$125 in order to move their inventory.

福山 (13.3):

1. Current offer is \$115. Intend to ship some shipment today @ \$110 in April but not done yet.
2. May forecast is 45K dropped from 100K in previous forecast.
3. LPL probably will not start to ship until June due to some quality issues. However, we need to watch for Samsung since Samsung already shipped PVT samples.

Best regards,

Evan Huang
AUO America Office
(408) 636-3985

AU-MDL-02736682

From: Evan Huang 黄杏文 <EvanHuang@auo.com>
Sent: Friday, May 5, 2006 11:43 PM (GMT)
To: Michael WK Wong ¶À¥Ã±j <MichaelWKWong@auo.com>
Cc: SY Tsai ½²²±|Ð <SYTsai@auo.com>
Subject: RE: HP, Apple, GD weekly report.
Attach: Apple NB & MNT Business Update_20060505.doc

Dear Michael,

Enclosed is the report for this week. Pls let us know if you have any questions.

Best regards,

Evan

-----Original Message-----

From: Michael WK Wong 黄永强

Sent: Friday, May 05, 2006 12:57 PM

To: Michael WK Wong 黄永强; Dominic Chen 陈豪智; Evan Huang 黄杏文; Evelyn Sun 傅璦雯; Nero Hung 洪沼源; Roger Hu 胡永鹏; SY Tsai 蔡盛羽; Shih Hung Yang 杨士弘

Subject: HP, Apple, GD weekly report.

My Dear Favorite Team, please remember to send in one's weekly report. By the way, I am taking this afternoon off. However I am still access-able by phone or email.

Have A Restful Weekend Where One Is,

Michael

-----Original Message-----

From: Michael WK Wong 黄永强

Sent: Tuesday, May 02, 2006 8:33 AM

To: Dominic Chen 陈豪智; Evan Huang 黄杏文; Evelyn Sun 傅璦雯; Nero Hung 洪沼源; Roger Hu 胡永鹏

Subject: HP, Apple, GD weekly report.

Guys, Richard made a comment to categorize our contents fitting into subjects such as:

- Forecast/price
- Issue list/Follow up item with ownership
- Project Status/Opportunity
- Market Intelligent (customers and Competitors)

Tell me what you think of them.

Best,

Michael

Apple NB & MNT Business Update

April 30 ~ May 6, 2006

Notebook

◆ Pricing

		March	April	May
M1 15.4" AG	AUO Offer	\$155	\$136 (\$145)	\$128
	Apple Target			\$110
M1 15.4" Glossy	AUO Offer			\$132.5
	Apple Target			\$112
M42 13.3"	AUO Offer		\$113	\$108.5
	Apple Target			\$100

◆ Shipment and Forecast (Up to 5/5)

		April	May	June	July	August	Sep
M1 15.4" AG	Apple Forecast	40K	10K	20K	30K	30K	30K
	AUO Supply	40K	25K				
M1 15.4" Glossy	Apple Forecast		16K	10K	7.5K	6K	6K
	AUO Supply		25K				
M42 13.3"	Apple Forecast	70K	115K	100K	50K	50K	50K
	AUO Supply	55K	80K				

◆ Highlight & Issue

■ M1 15.4"

✓ Apple revised forecast 15K and 9K downward for AG and Glossy display respectively causing inventory in May.

✓ A quality review meeting will be hold in Suzhou to reduce quality fallout and improve overall quality level.

■ M42 13.3"

✓ Apple claimed 35K shortfall in April and May is a disaster to M42 ramp. Request AUO to increase volume as much as possible.

✓ Have done 1K sorting in MainTek for pooling issue due to unseated PET.

■ General

✓ Top management meeting is set on 5/18 8:00 AM in Cupertino.

✓ QBR is set on 5/23 in AUO Hsinchu. Will include NB display technology review in the agenda. 5/25 dinner with AUO executives is still under confirmation.

✓ Apple will survey new NB display technology during the QBR trip for next generation display definition.

◆ **Customer information and market intelligence**

✓ JJ Park used to be in Samsung US Sales operation in charge of memory product line but left Samsung unhappily due to no job promotion internally. JJ is expected to be more rational than Priya but tough to deal as well. (Display search)

✓ Samsung shipped 132K @ \$168 in March, 40K @ \$135 and plan 20K @ \$120 (Display search)

✓ Apple plan for M1 and M42 in Q2 are 250K and 427K respectively. (Display search)

✓ CMO shipped 10K @ \$135 in April and already offered \$125 for May shipment but not accepted by Apple. CMO has no glossy display ship plan. (CMO)

✓ CMO already received 45K PO @ \$110 for May shipment. (CMO)

✓ LPL will not ship M42 until beginning of June. (CMO, Apple engineering)

✓ Samsung M42 display is still in post PVT stage about the same status as LPL. (Apple engineering)

✓ Apple will announce M42 next Tuesday. (Apple engineering)

Monitor

◆ **Engineering and quality Highlight**

✓ 24" W (slim type backlight): Design discussion is continuing back and forth on inverter and EE spec.

✓ Not much progress.

AU-MDL-06071729

From: James CP Chen 陳建斌
Sent: Saturday, May 13, 2006 6:48 PM
To: Nero Hung 洪沼源 <herohung@auo.com>; Steven Leung 梁兆龍 <stevenleung@auo.com>; Belinda Mao 毛本琳 <belindamao@auo.com>; Roger Hu 胡永鵬 <rogerhu@auo.com>
Cc: Kevin Lin 林建和 <kevinlin@auo.com>; Vincent Cheng 鄭水金 <vincentcheng@auo.com>; CM Wung 翁崇銘 <cmwung@auo.com>; Paul Peng 彭雙浪 <paulpeng@auo.com>
Subject: RE: May FPM LCD MPP - AUO

Dear team,

Please help to check Dell's demand change for all size in May including total TAM, 17", 19", and wide. By the way, please help to collect what's AUO and competitors' share change in Dell. Here are some price info about 17" in Dell for your reference.

1. Lxx : \$104 without any rebate.
 2. Sxx : \$105 with rebate
 3. CxT : \$107 (I am not sure if there is any rebate)
- Please help to verify the above info.

Thanks!
James CP Chen

-----Original Message-----

From: Nero Hung 洪沼源
Sent: 2006/5/12 [星期五] 下午 10:40
To: Steven Leung 梁兆龍; Belinda Mao 毛本琳; Roger Hu 胡永鵬
Cc: Kevin Lin 林建和; Vincent Cheng 鄭水金; James CP Chen 陳建斌; CM Wung 翁崇銘
Subject: FW: May FPM LCD MPP - AUO

Dear Team,
Tks for your best efforts to support DELL business.
As we got the file, DELL CUT 15" TAM a lot.
It's a signal that we should pay more attention at 15".
What strategy will DELL take in next months ?
Please co-work to dig it out and help us to make RIGHT decision.

My info for your reference:

1. 15": Will be decreased from 200K to 100K for total volumes in May.
 2. 17": Will have big promotion to enlarge DELL 17" market share.
- If you have any information, please feel free for discussion.

The MPP we received, should be considered the reality, expect May.

best regards,
nero

-----Original Message-----

From: Belinda Mao 毛本琳
Sent: 2006-05-12 [星期五] 下午 07:25

To: Owen_Chen@dell.com
Cc: JessicaLZ_Chen@Dell.com; Steven Leung 梁兆龍; Roger Hu 胡永鵬; Kevin Lin 林建和; Vincent Cheng 鄭水金;
 Nero Hung 洪沼源; Yin Wei Chang 張吟薇; Woon_Chin_Kok@Dell.com; Michelle_Chua@dell.com
Subject: Re: May FPM LCD MPP - AUO

Dear Owen & Jessica,

We're very sorry for we've already made following 15" shipments to BENQ & TPV before your MPP come to AUO.
 As per verbal discussion with Jessica just now, we'll remove the rest from TPV next week.

BENQ shipment as of 5/14 is 24K.

TPV shipment as of 5/14 is 5K, will cancel the rest 2K as per Jessica's request.

LCD Supplier	Panel Type	Segment	Integrator	Sum of May-06	Sum of Jun-06	Sum of Jul-06
AUO	15" TN	15E	BenQ	19	24	15
			TPV	7	20	55

Thanks very much for your kind understanding.

Best Regards,

Belinda Mao

Desktop Display Business Unit, Sales Div. 1

AU Optronics Corporation

Tel: +886-3-500-8800 Ext. 1456

Fax: +886-3-579-7320

E-Mail: belindamao@auo.com

From: Owen_Chen@dell.com [mailto:Owen_Chen@dell.com]

Sent: Friday, May 12, 2006 6:46 PM

To: JessicaLZ_Chen@Dell.com; Steven Leung 梁兆龍; Roger Hu 胡永鵬; Kevin Lin 林建和; Vincent Cheng 鄭水金; Belinda Mao 毛本琳; Nero Hung 洪沼源; Yin Wei Chang 張吟薇

Cc: Woon_Chin_Kok@Dell.com; Michelle_Chua@dell.com

Subject: RE: May FPM LCD MPP - AUO

AUO team

Here is updated on MPP to reflect latest demand change

Dell Confidential

Owen Chen

Dell Inc , Global Supply Manager

Office: 86-21-22030335

Cell : 86-13764531777

From: Chen, Owen

Sent: Wednesday, May 10, 2006 6:29 PM

To: Chen, Owen; Chen, JessicaLZ; 'StevenLeung@auo.com'; 'RogerHu@auo.com'; 'KevinLin@auo.com';

'VincentCheng@auo.com'

AU-MDL-06071730

Cc: Kim, Namjun; Kok, Woon Chin; Chua, Michelle; Asdhir, Vinay; Chang, Kee
Subject: May FPM LCD MPP - AUO

Dear AUO team,

Please refer to the attached Mar MPP. Please note there are 2 sheets, one is the integrators split for May-Jul, the other one is the MPP covers May, 06 - Jan, 07.

Please reply your support plan by COB May.17

Thank you

Dell Confidential

Owen Chen
Dell Inc, Global Supply Manager
Office: 86-21-22030335
Cell : 86-13764531777

Trial Exhibit 188

From Hubert Lee 李燦榮 <Hubert.Lee@auo.com>

:

Sent: Thursday, June 29, 2006 2:21 AM (GMT)

To: MSA0 業務一部 <MSA0@auo.com>; MSB0 業務二部 <MSB0@auo.com>;
Joselyn Liu 劉慧君 <Joselyn.Liu@auo.com>; Howard Lee 李皓宇
<Howard.Lee@auo.com>; Michael WK Wong 黃永強
<Michael.WK.Wong@auo.com>; Dominic Chen 陳豪智
<Dominic.Chen@auo.com>

Cc: Paul SL Peng 彭雙浪 <Paul.SL.Peng@auo.com>; Richard Bai 白柏龍
<Richard.Bai@auo.com>

Subj FW: AMLCD policy for NB
ect:

Dear All

FYI. It seems have chance to keep the price flat in July and might increase from Aug., Let's try to delivery to our customers that it have been the bottom of market now.

Hubert

From: Paul SL Peng 彭雙浪

Sent: Thursday, June 29, 2006 9:47 AM

To: Richard Bai 白柏龍; James CP Chen 陳建斌; Hubert Lee 李燦榮

Subject: FW: AMLCD policy for NB

FYI

From: SI Jeong 鄭盛日

Sent: Thursday, June 29, 2006 9:40 AM

To: Hui Hsiung 熊暉; Paul SL Peng 彭雙浪

Cc: David Su 蘇峰正

UNITED STATES DISTRICT COURT
NORTHERN DISTRICT OF CALIFORNIA
CR-09-0110 SI

Government Exhibit #: 188
Date Admitted: _____
By: _____ (Deputy Clerk)

Subject: AMLCD policy for NB

Dear Kuma,

Yesterday, I visited AMLCD to know the AMLCD NB policy.

Basically, AMLCD NB price is reached to cash cost already. Especially, both 14.1"W and 15.4"W are already under cash cost now.

Therefore, AMLCD decided to maintain June price to July and due to keep the price, if customer reduce the demand, he shall reduce the production.

AMLCD intentionally does like this to make his customer surely know that this is bottom price of both sizes.

Actually, i met Harry Cho who was working for SEC Taiwan branch office before, after he came back he is charging HP, Lenova, Apple accounts.

As i reported before, Harry got only 10K 15.4"W order from HP even though he quoted U\$ 85 last week.

According to his mentioned, HP got 6 weeks panel inventory now. Because of long term biz agreement with LPL, HP purchased 400k from LPL in this month.

He supposed that if HP requests LPL to drop 15.4"W price to U\$ 80, LPL may follow this price again. But AMLCD will not follow this price and just reduce the production according to demand reducing.

It may impact to 70% production for NB only in July. But AMLCD will indure this situation to maintain the current price.

In contrary , he will try to raise the price with strong demand products from July slightly.

He hopes AUO also follow AMLCD's strategy and make customer know our painful situation.

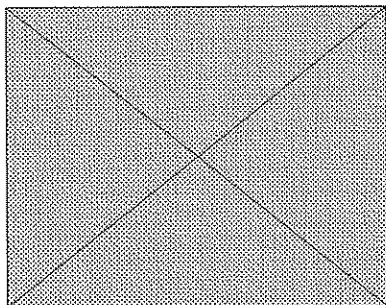
Someone told me that from '06 Q4, NB demand will pick up due to new Window OS is coming. But MNT will not be impacted by this event. Therefore, MNT may be shown the dropping curve in '07 but NB demand may possible revive.

In May LPL sold 1.45M panels of NB, but AMLCD only sold 1.4M.

In June, AMLCD expects to sell 1.5M and Monitor : 2M, TV : 1M.

Best regards,

smith



Smith Jeong

Director

**Global Sales & Marketing
AU Optronics Korea
3F, MJL B/D, 204-5, NonHyeon-1Dong,**

GangNam-Gu, Seoul, Korea

Tel: +82-2-515-8092

Fax: +82-2-515-8366

sijeong@auo.com

Trial Exhibit 111

From: Alice Ho 何秀玲 <Alice.Ho@auo.com>
Sent: Friday, August 11, 2006 6:58 AM (GMT)
To: Evan Huang 黃杏文 <Evan.Huang@auo.com>; Ben Huang 黃興邦 <Ben.Huang@auo.com>
Cc: Jerry Chen 陳雨村 <Jerry.Chen@auo.com>; Michael WK Wong 黃永強 <Michael.WK.Wong@auo.com>; Hubert Lee 李燦榮 <Hubert.Lee@auo.com>; Joselyn Liu 劉慧君 <Joselyn.Liu@auo.com>; Richard Bai 白柏龍 <Richard.Bai@auo.com>
Subject: RE: Pls call me....at 408-8738408...

Dear Evan,
 Has discussed with Richard, and we still hope to keep \$5(at least) for Sep. for both M42 and M1.
 FYI.

Pls fell free ot call us if any question.

b.rgds,

Alice Ho
 NB Business Unit
 AU Optronics Corporation
 Tel: +886-3-500-8800 Ext. 7712
 Mobile: +886-920-391906
 Fax: +886-3-579-7341
 Email: aliceho@auo.com

-----Original Message-----

From: Evan Huang 黃杏文
Sent: Friday, August 11, 2006 8:35 AM
To: Alice Ho 何秀玲; Ben Huang 黃興邦
Cc: Jerry Chen 陳雨村; Michael WK Wong 黃永強; Hubert Lee 李燦榮; Joselyn Liu 劉慧君; Evan Huang 黃杏文; Richard Bai 白柏龍
Subject: Pls call me....at 408-8738408...
Importance: High

Dear Alice and Ben,

Let's have discussion on below items.

1. M75 15.4"LED
 - JJ requested us to quote both absolute price and standard 15.4" base price by tonight.
 - CMO quoted "M1 price + \$44" (including additional warranty cost and etc). Dr. Zhong and Praveen called CMO to complain their offer today.
 - LPL and Samsung quoted based on starnd 15.4" market price. LPS quoted "starnd 15.4" market price + \$50)
 - JJ commented AUO quote is worse than two Koreans if base on starnd 15.4" market price but better if base on M1 price.

2. M42 / M42 A
 - NYer will update forecast to 40K in Sep. but final demand will depend on pricing. They hope us can offer less than \$110 if we still need to raise price.
 - NYer proposed 60K for 13.3" and 50K for 15.4" each month to CMO from Sep. if CMO agrees to keep \$105 for 13.3" and \$110 for 15.4".
 - CMO is thinking only to raise a few dollars (less than \$110) to bundle M1/M59 proposal.
 - LPL proposed flat prices to the end of this year: \$105 for 70K each month; \$100 for additional 60K each month. Apple didn't commit qty.

UNITED STATES DISTRICT COURT NORTHERN DISTRICT OF CALIFORNIA CR-09-0110 SI	
Government Exhibit #:	<u>111</u>
Date Admitted:	_____
By:	_____ (Deputy Clerk)

3. M1 / M59

- NYer can increase forecast to 40K if we can keep AG price @ \$115.
- CMO's preliminary proposal for 15.4" AG that bundles with 13.3" is \$125 in Sep. and \$135 from Oct.

Best regards,

Evan Huang
AUO America Office
(408) 636-3985

Trial Exhibit 112

From: Evan Huang 黃杏文 <Evan.Huang@auo.com>
Sent: Friday, August 11, 2006 11:55 PM (GMT)
To: Michael WK Wong 黃永強 <Michael.WK.Wong@auo.com>
Cc: SY Tsai 蔡盛羽 <SY.Tsai@auo.com>
Subject: Apple weekly report
Attach: Apple NB & MNT Business Update_20060811.doc

Dear Michael,

Pls refer to Apple weekly report and let me know if you have any questions.

Best regards,

Evan Huang
AUO America Office
(408) 636-3985

UNITED STATES DISTRICT COURT
NORTHERN DISTRICT OF CALIFORNIA
CR-09-0110 SI
Government Exhibit #: 112
Date Admitted: _____
By: _____ (Deputy Clerk)

Δ11LMD1_02982703

Apple NB & MNT Business Update

Aug 6 ~ Aug 12, 2006

Notebook

◆ Pricing

		June	July	Aug	Sep
M1 15.4" AG	AUO Offer	\$115	\$115	\$115	\$120
	Apple Target	\$115	\$110	\$105	\$115
M1 15.4" Glossy	AUO Offer	\$119.5	\$119.5	\$119.5	\$124.5
	Apple Target	\$119.5	\$114.5	\$109.5	\$119.5
M42 13.3"	AUO Offer	\$108.5 (35K) \$105 (35K)	\$105	\$105	\$110
	Apple Target	\$108.5 (35K) \$105 (35K)	\$105	\$100	\$105

◆ Shipment and Forecast (Up to 8/11)

		July	August	Sep
M1 15.4" AG	Apple Forecast	0K	0K	0K
	AUO Supply			
M1 15.4" Glossy	Apple Forecast	10K	4K	3K
	AUO Supply	10K	4K	
M42 / M42A 13.3"	Apple Forecast	80K	30K=>70K	20K=>16K
	AUO Supply	80K	40K	
M59 AG	Apple Forecast			11K=>16K
	AUO Supply			
M59 Glossy	Apple Forecast			1K=>2K
	AUO Supply			

		Oct	Nov	Dec
M1 15.4" AG	Apple Forecast	0	0	0
	AUO Supply			
M1 15.4" Glossy	Apple Forecast	0	0	0
	AUO Supply			
M59 15.4" AG	Apple Forecast	30K	15K	10K=>15K
	AUO Supply			
M59 15.4" Glossy	Apple Forecast	7K=>5K	3K	2K
	AUO Supply			
M42/M42"A 13.3"	Apple Forecast	40K	40K	40K
	AUO Supply			

◆ Highlight & Issue

■ M42 / M42A 13.3"

✓ Apple is asking supply increase up to 70K in Aug. AUO confirmed 40K supply in total.

✓ AUO has proposed \$110 as Sep. price. Apple is willing to increase Sep. qty from 16K to 40K but price should be less than \$110.

✓ Apple will increase forecast qty from 16K to 40K, but final demand will depend on pricing.

■ **M59 15.4"**

✓ AUO proposed \$120 and \$124.5 as AG and Glossy price respectively in Sep. Apple is willing to increase qty from 18K to 40K but price should keep flat.

■ **Next Generation Display for 2007**

✓ AUO re-quoted 15.4" LED model (M75) at "M1/M59 price + \$28" or "standard 15.4" market price + \$49" from March, 07'.

✓ Apple has suspended 13.3" LED project to end of this year.

■ **Others**

✓ Paul, James and Hubert will have lunch appointment with Apple on 8/15 for general business discussion.

◆ **Customer information and market intelligence**

✓ LPL is discussing a package proposal with Apple for M42 / M42A: \$105 for first 70K each month to 2006/E; \$100 for additional 60K each month to 2006/E. Apple hasn't committed qty. (CMO)

✓ CMO is talking 15.4" / 13.3" pricing and qty package with Apple. CMO can agree only raise a few dollars on 13.3" for 60K but need to raise 15.4" price to \$125 for 50K in Sep. (CMO)

✓ Four suppliers are bidding M75 project (15.4" LED). Only three will be in and one of the threes will plan back up role. (Apple Engineering team)

✓ CMO quoted M75 at "standard 15.4" market price + \$54" or "M59 price + \$34"; LPL quoted at "standard 15.4" market price + \$50". (CMO)

Monitor

◆ **Engineering and quality Highlight**

✓ AUO quoted 20"W TN at \$160 in Q2, 07' based on 18 month warranty and \$171 based on 36 month warranty.

AU-MDL-06430178

From: Jerry Chen ³~«B§ø <Jerry.Chen@auo.com>
Sent: Friday, August 11, 2006 1:13 AM (GMT)
To: Alice Ho |ó`q-Â <Alice.Ho@auo.com>; Evan Huang ¶À§öðå
 <Evan.Huang@auo.com>; Ben Huang ¶Ä¿³¹¹ <Ben.Huang@auo.com>
Cc: Michael WK Wong ¶À¶Ä±j <Michael.WK.Wong@auo.com>; Hubert Lee §öÄé°a
 <Hubert.Lee@auo.com>; Joselyn Liu ¼B¼z§g <Joselyn.Liu@auo.com>; Richard Bai
 ¥Õ-fÀs <Richard.Bai@auo.com>; Matt Ke ³_«H|W <Matt.Ke@auo.com>
Subject: RE: Pls call me....at 408-8738408...

Dear Evan,

Our suggestion is follow LPL->" Standard+50"
Base on WritsView, 15.4W standard is USD 96.

According to this baseline, "M1+28" should be the better offer in terms of NY's position.

B/R

Jerry

From: Alice Ho 何秀玲
Sent: Friday, August 11, 2006 8:54 AM
To: Evan Huang 黃杏文; Ben Huang 黃興邦
Cc: Jerry Chen 陳雨村; Michael WK Wong 黃永強; Hubert Lee 李燦榮; Joselyn Liu 劉慧君; Richard Bai 白柏龍
Subject: RE: Pls call me....at 408-8738408...

Dear Evan,
We(PM/ Sales)開農會中。。

Call U later ~

B. RGDS ,

Alice Ho
 NB Business Unit
 AU Optronics Corporation
 Tel: +886-3-500-8800 Ext. 7712
 Mobile: +886-920-391906
 Fax: +886-3-579-7341
 Email: aliceho@auo.com

-----Original Message-----

From: Evan Huang 黃杏文
Sent: Friday, August 11, 2006 8:35 AM
To: Alice Ho 何秀玲; Ben Huang 黃興邦
Cc: Jerry Chen 陳雨村; Michael WK Wong 黃永強; Hubert Lee 李燦榮; Joselyn Liu 劉慧君; Evan Huang 黃杏文;
 Richard Bai 白柏龍
Subject: Pls call me....at 408-8738408...
Importance: High

Dear Alice and Ben,

Let's have discussion on below items.

1. M75 15.4"LED

- JJ requested us to quote both absolute price and standard 15.4" base price by tonight.
- CMO quoted "M1 price + \$44" (including additional warranty cost and etc). Dr. Zhong and Praveen called CMO to complain their offer today.
- LPL and Samsung quoted based on standard 15.4" market price. LPS quoted "standard 15.4" market price + \$50)
- JJ commented AUO quote is worse than two Koreans if base on standard 15.4" market price but better if base on M1 price.

2. M42 / M42 A

- NYer will update forecast to 40K in Sep. but final demand will depend on pricing. They hope us can offer less than \$110 if we still need to raise price.
 - NYer proposed 60K for 13.3" and 50K for 15.4" each month to CMO from Sep. if CMO agrees to keep \$105 for 13.3" and \$110 for 15.4".
 - CMO is thinking only to raise a few dollars (less than \$110) to bundle M1/M59 proposal.
 - LPL proposed flat prices to the end of this year: \$105 for 70K each month; \$100 for additional 60K each month.
- Apple didn't commit qty.

3. M1 / M59

- NYer can increase forecast to 40K if we can keep AG price @ \$115.
- CMO's preliminary proposal for 15.4" AG that bundles with 13.3" is \$125 in Sep. and \$135 from Oct.

Best regards,

Evan Huang
AUO America Office
(408) 636-3985

AU-MDL-02981356

From: Evan Huang 黄杏文 <Evan.Huang@auo.com>
Sent: Friday, August 18, 2006 11:11 PM (GMT)
To: Michael WK Wong 黄永强 <Michael.WK.Wong@auo.com>
Cc: SY Tsai 蔡盛羽 <SY.Tsai@auo.com>
Subject: Apple weekly report
Attach: Apple NB & MNT Business Update_20060818.doc

Dear Michael,

Pls refer to my weekly report and let me know if you have any questions.

Best regards,

Evan Huang
AUO America Office
(408) 636-3985

Apple NB & MNT Business Update

Aug 6 ~ Aug 12, 2006

Notebook

◆ Pricing

		June	July	Aug	Sep
M1 15.4" AG	AUO Offer	\$115	\$115	\$115	\$120
	Apple Target	\$115	\$110	\$105	\$115
M1 15.4" Glossy	AUO Offer	\$119.5	\$119.5	\$119.5	\$124.5
	Apple Target	\$119.5	\$114.5	\$109.5	\$119.5
M42 13.3"	AUO Offer	\$108.5 (35K) \$105 (35K)	\$105	\$105	\$110
	Apple Target	\$108.5 (35K) \$105 (35K)	\$105	\$100	\$107

◆ Shipment and Forecast (Up to 8/18)

		July	August	Sep
M1 15.4" AG	Apple Forecast	0K	0K	0K
	AUO Supply			
M1 15.4" Glossy	Apple Forecast	10K	4K	3K=>4K
	AUO Supply	10K	4K	
M42 / M42A 13.3"	Apple Forecast	80K	70K=>40K	16K=>40K
	AUO Supply	80K	40K	21K
M59 AG	Apple Forecast			16K=>46K
	AUO Supply			21K
M59 Glossy	Apple Forecast			2K
	AUO Supply			2K

		Oct	Nov	Dec
M1 15.4" AG	Apple Forecast	0	0	0
	AUO Supply			
M1 15.4" Glossy	Apple Forecast	0	0	0
	AUO Supply			
M59 15.4" AG	Apple Forecast	30K=>60K	15K=>40K	15K=>40K
	AUO Supply			
M59 15.4" Glossy	Apple Forecast	5K=>14K	3K=>9K	2K=>9K
	AUO Supply			
M42/M42"A 13.3"	Apple Forecast	40K	40K	40K
	AUO Supply			

◆ Highlight & Issue

■ M42 / M42A 13.3"

✓ Apple only can accept \$2 price up in Sep. They are arguing M42 panel price is too much higher than standard 14"W which is against original agreement.

✓ AUO only committed 21K supply in Sep. which is 19K shortfall to forecast.

✓ Engineering team is working on M42A antenna noise issue. This issue might impact AUO delivery to M42A.

■ **M59 15.4"**

✓ AUO proposed \$120 and \$124.5 as AG and Glossy price respectively in Sep. Apple is willing to increase qty from 18K to 40K but price should keep flat.

■ **Next Generation Display for 2007**

✓ AUO re-quoted 15.4" LED model (M75) at "M1/M59 price + \$28" or "standard 15.4" market price + \$49" from March, 07".

✓ Apple claimed that AUO offer for M75 is the 3rd highest among four suppliers. JJ requested AUO provide cost delta breakdown between standard 15.4" and M75.

■ **Others**

✓ Dan and JJ are planning to visit AUO on 9/8 for market survey.

✓ Next QBR is going to be hold in Cupertino is the week of 9/11.

◆ **Customer information and market intelligence**

✓ CMO closed 13.3" deal at \$107 for 60K in Sep. (CMO)

✓ CMO proposed \$120 for 15K in Sep. (CMO)

✓ LPL will ship total 180K in Aug. (JJ)

Monitor

◆ **Highlight & Issue**

■ **20"W TN**

✓ Apple is asking AUO to confirm \$160 NTE price upon 36 months warranty.

✓ JJ said AUO definitely will be awarded in this project since 20"W is an optimized cut in AUO G6.

Trial Exhibit 172

From: Evan Huang 黄杏文 <Evan.Huang@auo.com>
Sent: Friday, August 25, 2006 11:22 PM (GMT)
To: Hubert Lee 李燦榮 <Hubert.Lee@auo.com>; Alice Ho 何秀玲 <Alice.Ho@auo.com>;
Jerry Chen 陳雨村 <Jerry.Chen@auo.com>; Joselyn Liu 劉慧君
<Joselyn.Liu@auo.com>; Ben Huang 黃興邦 <Ben.Huang@auo.com>; Michael WK
Wong 黃永強 <Michael.WK.Wong@auo.com>; Richard Bai 白柏龍
<Richard.Bai@auo.com>
Subject: Watchful!

Dear All,

NYer is suspecting suppliers are exchanging price information. This is illegal, especially in the states. We need to be watchful!

Best regards,

Evan Huang
AUO America Office
(408) 636-3985

UNITED STATES DISTRICT COURT NORTHERN DISTRICT OF CALIFORNIA CR-09-0110 SI Government Exhibit #: <u>172</u> Date Admitted: _____ By: _____ (Deputy Clerk)
--

Trial Exhibit 113

From: Yi An Chen 陳怡安 <YiAn.Chen@auo.com>
Sent: Wednesday, October 25, 2006 8:07 AM
To: Richard Bai 白柏龍 <Richard.Bai@auo.com>; Hubert Lee 李燦榮
 <Hubert.Lee@auo.com>; Alice Ho 何秀玲 <Alice.Ho@auo.com>; Joselyn Liu 劉慧君
 <Joselyn.Liu@auo.com>; Dominic Chen 陳豪智 <Dominic.Chen@auo.com>
Subject: Information from CMO for HP's Oct price discussion

Dear all,

CMO just phoned me for HP's Oct price discussion. HP told CMO that AUO already accept \$4 up and is pushing CMO to accept as well.

CMO current status:

1. CMO quote \$14 up for Oct.
2. CMO's target for Oct is to reach \$100 for both 14.1"W and 15.4"W
3. CMO's targeting for Oct
 - 14.1"W \$95~100
 - 15.4"W \$95~100
 - 17"W \$150 (Sep: \$135)
 - 17"W DL \$195 (Sep: \$180)

AUO's status that I told to CMO:

1. AUO still insist \$12~15 price up in Oct
2. AUO is not urgent to finalize Oct price as HP still not visit Korea yet.
3. HP already offered 2nd target to AUO and that is \$7 up
4. AUO's targeting for Oct
 - 14.1"W \$100
 - 15.4"W \$100
 - 17"W \$155
 - 17"W DL \$200

Regards,

Yi An Chen (Joanne)
 Notebook PC Display Business Unit
 AU Optronics Corporation
 1 Li-Hsin Rd. 2
 Science-Based Industrial Park
 Hsinchu 300, Taiwan, R.O.C.
 Tel: +886-3-565-55716
 Mobile: +886-939-939-839
 Fax: +886-3-579-7341
 Email: YiAn.Chen@auo.com



UNITED STATES DISTRICT COURT NORTHERN DISTRICT OF CALIFORNIA CR-09-0110 SI	
Government Exhibit #:	<u>113</u>
Date Admitted:	_____
By:	_____ (Deputy Clerk)

AU-MDL-02805592

From: Dominic Chen 陳豪智 <Dominic.Chen@auo.com>
Sent: Monday, October 9, 2006 2:25 PM (GMT)
To: Richard Bai 白柏龍 <richardbai@auo.com>; Yi An Chen 陳怡安 <yianchen@auo.com>
Cc: Michael WK Wong 黃永強 <michaelwkwong@auo.com>; Dominic Chen 陳豪智 <dominicchen@auo.com>
Subject: RE: Price trend in Oct'06-1H
Attach: 10thsignatures.jpg

Richard,

Understood.

I already deliver the information of material supply statu, consumer hot season issue, under capacity..... to Rita and Jun Kim.

Now they are asking for some upside and I'm telling them that it's very difficult based on "current situation".

I'll keep painting the picture before you come to Houston.

Let's check our competitor's situation for reference also.

Regards,

Dominic

-----Original Message-----

From: Richard Bai 白柏龍
Sent: 2006/10/9 [星期一] 上午 05:05
To: Dominic Chen 陳豪智; Yi An Chen 陳怡安
Cc:
Subject: FW: Price trend in Oct'06-1H

Dominic,

According to Witsview and DS, the price of NB panel still raised in Oct.. And the reference price is much higher than the price we offered to HP. Let's try to upside price with HP in Oct.. Thanks.

By the way, please watch Tim's impact.

Richard

-----Original Message-----

From: Ining Lai 賴逸寧
Sent: 2006/10/5 [星期四] 下午 07:56
To: Paul SL Peng 彭雙浪; Richard Bai 白柏龍; Joselyn Liu 劉慧君; Hubert Lee 李燦榮; Alice Ilo 何秀玲; Alex Wang 王俊祥; Angus Chen 陳國祥; Albert IH Lai 賴宜鴻; Kai Chang 張凱翔; Yi An Chen 陳怡安; Jill Chen 陳韻雯; Sean Lin 林順宏; Stella Wu 吳嫻樺; Amy Tu 杜怡靜; Ben Huang 黃興邦; Briant Lee 李勇立; Selena Chen 陳淑君; Michael WK Wong 黃永強; Jeremy Chen 陳建良; Ling Huang 黃惠玲; Kevin Guo 郭可風; Howard Lee 李皓宇; Jerry Chen 陳雨村; Beyond Yang 楊榮欽; Emerson Huang 黃信愷; Ivy GP Lee 李金萍; Kay Liu 劉孟軒; Matt Ke 柯信名; Maxine Lee 李涵郁; Sy Hsiao 蕭士宇; Toledo Wang 王寶寬; Zephyr

Hsu 徐千惠; Alfonso Chang 張碩峰; CH Lin 林家弘; Stefan Chen 陳玠廷

Cc:
Subject: Price trend in Oct'06-1H

Dear all,

IT panel price continues the uptrend while TV panel price also performs firm at the beginning of the fourth quarter. Seasonal demand and supply constraint are the key factors pushing price higher. TV panel price is expected to perform dull in the 1H of Oct'06 with 32"W panel price remaining stable.

WitsView		Aug'06-2H		Sep'06-1H			Sep'06-2H		Oct'06-1H	Chg.
				Low	Avg.	High				
	12.1"	118	118	118	112	118	120	-		
	12.1"W	120	120	120	115	120	122	-		
	13.3"W	119	120	120	118	120	125	-		
	14.1"	99	101	101	98	101	102	-		
NB	14"W	96	99	99	99	101	103	2		
	15"	98	99	99	97	99	101	-		
	15P	145	145	145	140	145	147	-		
	15.4"W	99	102	102	100	103	105	1		
	17"W	175	175	175	165	170	175	-5		
	15"	100	107	107	108	110	113	3		
MNT	17"	113	125	125	128	130	133	5		
	19"	139	145	145	148	150	153	5		
	20.1"	165	168	168	165	168	175	-		
TV	32"	365	365	365	345	365	370	-		
	37"	555	545	540	530	535	550	-5		

Displaysearch		Aug'06-2H		Sep'06-1H			Sep'06-2H		Oct'06-2H	Chg.
				Low	Avg.	High				
	14.1"	93	93	93	93	95	98	2		
NB	14"W	94	94	97	98	100	101	3		
	15"	94	94	94	94	97	100	3		
	15.4"W	95	95	99	100	103	105	4		
	15"	96	98	103	105	108	112	5		
MNT	17"	110	115	122	125	128	130	6		
	19"	135	138	145	146	150	152	5		
	20"	170	170	171	165	170	177	-1		
TV	32"W	360	360	360	345	360	380	-		
	37"W	570	560	545	520	545	550	-		
	42"W	750	730	700	660	680	700	-20		

Last update:2006/10/05

Any questions, please let me know.

Thanks!

Best regards,

Iris

Iris Lai
Notebook PC Display Business Unit
Marketing Division
AU Optronics Corporation
Tel: +886-3-500-8800 Ext. 1806
Fax: +886-3-579-7341
ininglai@auo.com

Trial Exhibit 189

From: Steven Leung 梁兆龍 <Steven.Leung@auo.com>
Sent: Thursday, November 23, 2006 1:15 AM (GMT)
To: Roger Hu 胡永鵬 <Roger.Hu@auo.com>
Subject: For Your Reference #2

Hi Team,

As market info. sharing,

For Dec. pricing, in general, some of major suppliers would like to keep flat for first quotation, but prepare for \$2-3 down for 17" and 19".

Based on different Nov. price level, I would like to sample "A" company for internal reference of our Dec. pricing ideas.

They were aggressive to grab 17" vol. with \$125 (w/o rebate) and dropped 19" price from \$153-\$155 around to \$148 (w/o rebate, vol. recovery from 100K to 200K) under DELL's pressure in Nov..

So I would like to provide the ideas as below regarding the above.

1st quotation is to Keep flat.

2nd :

\$2-3 reduction

3rd : Bottom prices

15" : \$100

17" : \$122

19" : \$145

By the way, DELL Dec. demand is 2.4M around, 45-50% is for 17" as before and they're planning a big promotion for 19"TN so I think there is no big concern about demand wise, but most suppliers are still worrying about future market demand so the price would be dropped away from feasible trend.

I will keep all of you updated if any.

Best Regards,
Kevin 11/21

From: Kevin Lin 林建和
Sent: Sunday, November 19, 2006 12:44 PM
To: Steven Leung 梁兆龍; Nero Hung 洪沼源; CM Wung 翁崇銘
Cc: James CP Chen 陳建斌; Vincent Cheng 鄭水金; Peter CH Tien 田志豪
Subject: FW: FPM LCD Cost Target (AUO - December)
Importance: High
Sensitivity: Confidential

Hi Team,

FYI, and we need to submit Dec. pricing by Nov. 22.

Thanks,
Kevin 11/19

-----Original Message-----

From: Gena_Ong@Dell.com [mailto:Gena_Ong@Dell.com]
Sent: 2006/11/17 [星期五] 下午 04:27
To: Vinay_Asdhir@Dell.com; Kevin Lin 林建和; Vincent Cheng 鄭水金

UNITED STATES DISTRICT COURT NORTHERN DISTRICT OF CALIFORNIA CR-09-0110 SI Government Exhibit #: <u>189</u> Date Admitted: _____ By: _____ (Deputy Clerk)
--

Cc: kee_chang@dell.com
Subject: FPM LCD Cost Target (AUO - December)

Hi Kevin,

Please provide the quote for December06

Following is Dell's target cost for December. Please submit your most-favor-nation pricing to Dell by COB Nov 22, 2006.

AUO	
Panel	Dec-06
15"TN	\$66
17"TN	\$72
19"TN	\$109
19"VA	\$124
20"W VA	\$155
24"W	\$335

Pls provide:

- 1) Your best and firm quote to these panels
- 2) Data that shows Dell advantage pricing (MFN) relative to the market. (please fill in the attached file)
- 3) Budgetary quote for Dec'06

PLEASE NOTE THAT DEPSITE PROMISES IN THE LAST QBR AUO HAS NOT BEEN PROVIDING THE MFN PRICING DATA TO DELL AS PER THE ATTACHED FILE. PLEASE MAKE SURE TO DO SO.

Regards,
Gena Ong

<<AUO quote sheet -July 20 2006.zip>>
Global Commodity Manager-FPM LCD Panels
Dell Inc., Singapore Design Center.

DELL Confidential.