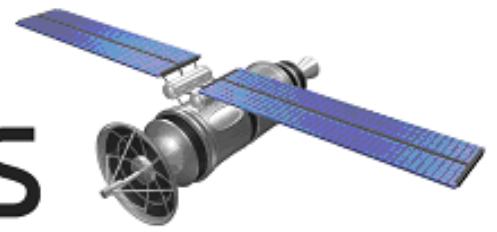


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The Global Semiconductor Industry Analysts

FH MONDAY

11 April 2022

Qualcomm Invests \$100 million for Snapdragon

Qualcomm announced this week its Snapdragon Metaverse Fund, which boasts a total investment of \$100 million meant to support both developers and companies actively producing extended reality (XR) ecosystems as well as the augmented reality (AR) and artificial intelligence (AI) technologies designed to advance the XR experience.

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Syntiant Raises \$55 Million, Ships 20 Million+ Chips

Ultra-low power AI accelerator startup Syntiant has closed a funding round of \$55 million, bringing the company's total raise to \$110 million. The company, which was founded in 2017, was backed by new and existing investors.

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Chinese takeover of Newport Wafer Fab approved

The government has decided not to intervene in the takeover of Newport Wafer Fab by quietly approving the controversial sale of a Welsh microchip factory to a Chinese-owned firm.

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TALK TO US



Micron Navigates Supply Chain Issues, More Than Triples Profit

Micron Technology, the world's third-largest memory chipmaker, avoided supply chain snags with nearly quadruple profits in its latest fiscal quarter, ended on Mar. 3. The chipmaker posted net income of \$2.3 billion during its second quarter compared with \$603 million in the same period a year earlier.

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Intel, Micron, ADI form alliance

Intel, Micron, ADI and MITRE Engenuity have agreed to accelerate semiconductor research, development, and prototyping to build a more robust U.S. semiconductor industry.

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Future Horizons Ltd, • 44 Bethel Road • Sevenoaks • Kent TN13 3UE • England

Tel: +44 1732 740440 • Fax: +44 1732 740442

e-mail: mail@futurehorizons.com • <http://www.futurehorizons.com/>

Affiliates in Europe, India, Israel, Japan, Russian, San Jose California, USA

Qualcomm Invests \$100 Million For Snapdragon Metaverse Fund

Qualcomm announced this week its Snapdragon Metaverse Fund, which boasts a total investment of \$100 million meant to support both developers and companies actively producing extended reality (XR) ecosystems as well as the augmented reality (AR) and artificial intelligence (AI) technologies designed to advance the XR experience.

Qualcomm's Snapdragon chipsets have been meeting with increasing success in the 5G market; during the first quarter of Qualcomm's fiscal 2022 (which ended on Dec. 26, 2021), the Snapdragon line was on a path toward annual revenue growth of 60 percent. The company also reported revenues of \$10.7 billion, which reflects a 30 percent increase year over year. Pair that with the rapidly increasing advancements in virtual reality (VR) over the past year by companies such as Meta and Microsoft, and it's no wonder Qualcomm is eager to grasp the metaverse market.

Syntiant Raises \$55 Million, Ships 20 Million+ Chips

Ultra-low power AI accelerator startup Syntiant has closed a funding round of \$55 million, bringing the company's total raise to \$110 million. The company, which was founded in 2017, was backed by new and existing investors.

Syntiant also announced that it has shipped more than 20 million of its neural decision processor chips to date, making it one of the few edge AI chip startups shipping in substantial volumes today.

Among five new investors this round was Renesas Electronics Corp. Syntiant and Renesas have been collaborating on a "voice-controlled multimodal AI solution" since last summer, which combines Renesas' RZ/V series microprocessors with Syntiant's NDP120. This design uses Syntiant's always-on neural decision processor to enable voice activation for a variety of vision-based AI applications, which are performed on the Renesas chip; all while keeping the standby power very low.

Chinese takeover of Newport Wafer Fab approved

The government has decided not to intervene in the takeover of Newport Wafer Fab by quietly approving the controversial sale of a Welsh microchip factory to a Chinese-owned firm.

Nexperia, the Amsterdam-headquartered spin-off from NXP owned by Wingtech of Shanghai, took a 15% share in Newport Wafer Fab in 2019. Nexperia was a customer of Newport Wafer Fab.

Nexperia got the right to trigger a 100% buy-out option of Newport Wafer Fab and to put two directors on the Newport Wafer Fab board if it fell into financial difficulties.

Micron Navigates Supply Chain Issues, More Than Triples Profit

Micron Technology, the world's third-largest memory chipmaker, avoided supply chain snags with nearly quadruple profits in its latest fiscal quarter, ended on Mar. 3. The chipmaker posted net income of \$2.3 billion during its second quarter compared with \$603 million in the same period a year earlier.

"Execution was outstanding with our industry-leading 1-alpha DRAM and 176-layer NAND technology node ramps delivering strong cost reductions," Micron CEO Sanjay Mehrotra said on a Mar. 29 conference call with analysts. "Our portfolio transformation continues to gain momentum as we lead the industry on the DDR5 transition and grow our mix of NVMe data center SSDs."

The company navigated through both Covid lockdowns in China as well as the Russian war in Ukraine; events that still threaten to constrain its supply chain.

Intel, Micron, ADI form alliance

Intel, Micron, ADI and MITRE Engenuity have agreed to accelerate semiconductor research, development, and prototyping to build a more robust U.S. semiconductor industry.

The engagement establishes a Semiconductor Alliance to propose the foundation for a whole-of-nation approach for a more innovation-focused U.S. semiconductor industry and supply chain.

The Semiconductor Alliance, led by MITRE Engenuity, was developed from working groups in 2021, and its principles were published in a white paper on American Innovation for American Growth summarizing the Alliance's call to action for a fair and objective National Semiconductor Technology Center (NSTC).