

2026 ASIA TECH CONFERENCE

AI super-cycle & supply chain opportunities

Monday-Friday, March 16-20 | Grand Hyatt Hotel Taipei, Taiwan

PLENARY

Wednesday, March 18 | Ballroom II, 3/F

9-9:50 a.m. **When aging demographics meet AI disruption: Keep it REAL**
Chris Oberoi, Head of Asia Pacific Equity Research,
BofA Global Research
Winnie Wu, Co-head of China Equity Research, Head of Asia Pacific
Equity Strategist and APAC Financial Institutions Research, BofA
Global Research

10-10:50 a.m. **Defense: From niche to megatrend**
Tai Ming Cheung, Professor; Director, UC Institute on Global
Conflict and Cooperation, University of California San Diego
KJ Hwang, Korea Auto & Auto Parts Analyst, BofA Global Research
Moderator: Chris Oberoi, Head of Asia Pacific Equity Research,
BofA Global Research

11-11:50 a.m. **Semiconductor expansion: Advancing front-end manufacturing
and back-end packaging roadmap**
Leslie Wu, CEO, Ronghe Consulting (Dalian) Co., Ltd.;
former TSMC Chief Engineer
Moderator: Haas Liu, Asia Semiconductor Analyst,
BofA Global Research
This session will be in Mandarin with English interpretation

Noon- 12:50 p.m.	Lunch panel: BofA Global & APAC Research tech hardware analysts panel Wamsi Mohan, IT Hardware and Technology Supply Chain Research, BofA Global Research Doris Kao, Greater China Technology Hardware Analyst, BofA Global Research Mike Yang, Greater China Semiconductor Analyst, BofA Global Research Simon Woo, Head of Korea Research and APAC Technology Research Co-ordinator, BofA Global Research Moderator: Robert Cheng, Head of Taiwan Research and Head of Asia Tech Hardware Research, BofA Global Research <i>Lunch will be served during the session</i>	Noon- 1:50 p.m.	Networking lunch Ballroom I, 3/F
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1-1:50 p.m. **AI disruption – what’s coming next?**
Timothy Papandreou, Founder & CEO, ETA Advisors*
Moderator: Winnie Wu, Head of APAC Equity Strategy and
Co-head of China Equity Research, BofA Global Research

**Speaker will present virtually*

2-2:50 p.m. **How AI is transforming the gaming industry**
Dr. Serkan Toto, Founder and CEO, Kantan Games
Moderator: Yoshitaka Nagao, Internet and Games Sector Analyst,
BofA Global Research

**Speaker will present virtually*

3-3:50 p.m. **Fireside chat with Arm**
Ian Thornton, Vice President of Investor Relations, Arm*
Moderator: Simon Woo, Head of Korea Research and APAC
Technology Research Co-ordinator, BofA Global Research

**Speaker will present virtually*

4-4:50 p.m. **Data center innovation in the AI era**
Jie Hu, Vice President, Centrin Data Systems*
Moderators:
Winnie Wu, Co-head of China Equity Research, Head of Asia
Pacific Equity Strategist and APAC Financial Institutions
Research, BofA Global Research
Daley Li, Greater China IT Services and Software Analyst,
BofA Global Research*

**Speaker will present virtually*

This session will be in Mandarin with English interpretation