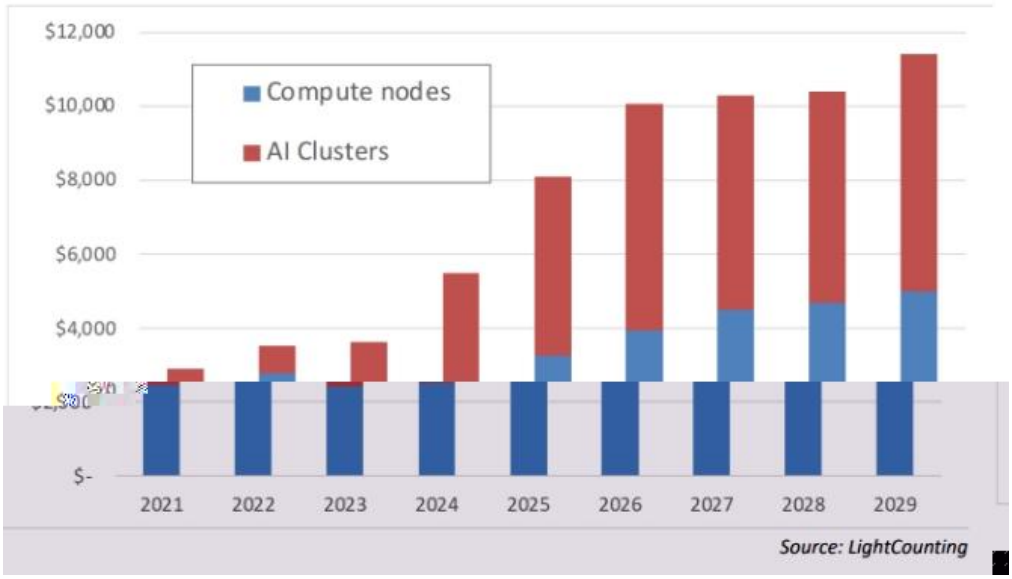
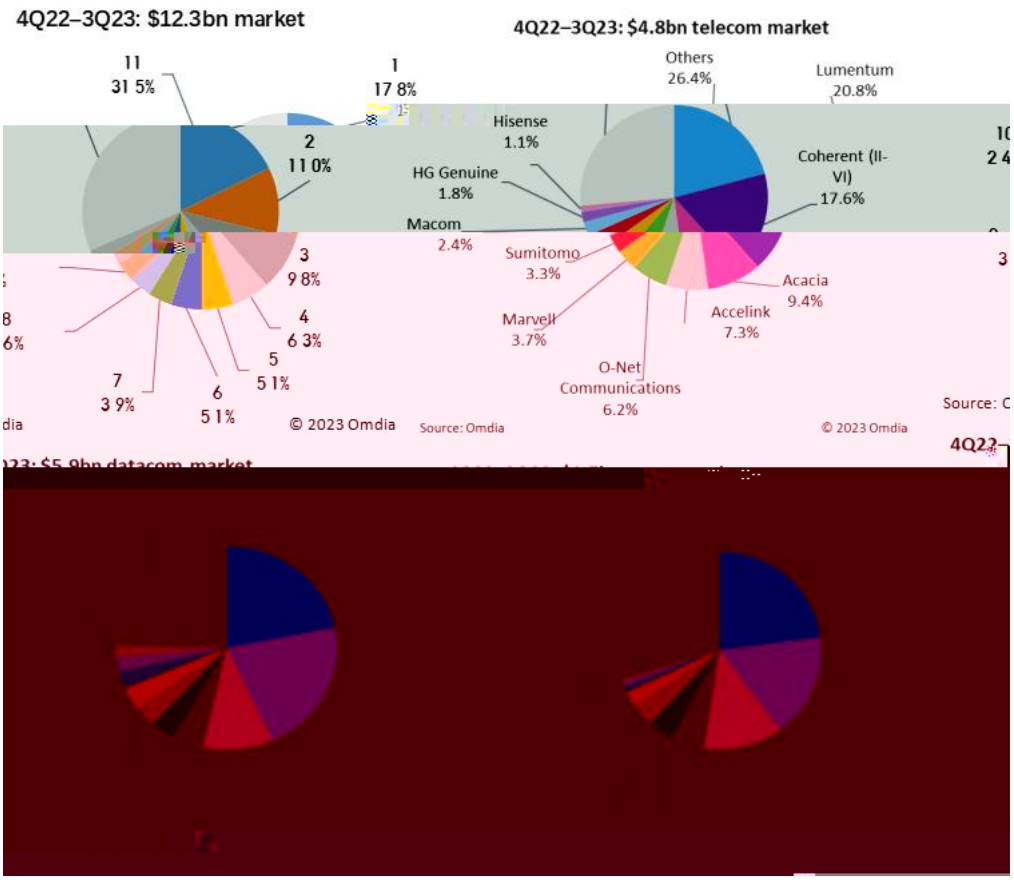
Accelink


$12,000
$10,000
$8,000
$6,000
$4,000
$-
Compute nodes
AI Clusters
2021
2022
2023
2024
2025
2026
2027
2028
2029
Source: LightCounting


4Q22–3Q23: $12.3bn market
11
31 5%
1
17 8%
2
11 0%
3
9 8%
4
6 3%
5
5 1%
6
5 1%
7
3 9%
© 2023 Omdia
Source: Omdia
4Q22–3Q23: $4.8bn telecom market
Others
26.4%
Lumentum
20.8%
Hisense
1.1%
HG Genuine
1.8%
Macom
2.4%
Sumitomo
3.3%
Coherent (II-VI)
17.6%
Acacia
9.4%
Accelink
7.3%
Marvell
3.7%
O-Net Communications
6.2%
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Source: O

C+L 400G

200G 400G 800G 1.6T

5G-A 6G 25G PON/50G PON

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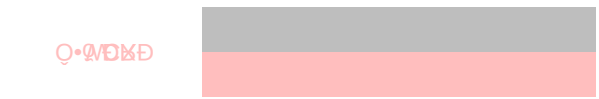

	2,550,482,500.00						18.53%	18.53%				
	80,000,000.00											
	3,000,000.00											
	800,000.00											

	2,634,282,500.00											