



**ThinkEquity LLC**  
A Pannure Gordon Company

## 1st Annual Semiconductor Conference Thursday, June 3, 2010

The Princeton Club  
15 West 43rd Street  
New York, NY

**7:00 AM REGISTRATION: 4th FLOOR  
BREAKFAST: PROSPECT LOUNGE, 2nd FLOOR**

SESSION I Triangle Pass		SESSION II McCosh	
8:00 AM	<b>Micron Technology Inc. (MU)</b> Kipp Bedard, Vice President, Investor Relations	8:00 AM	<b>CEVA, Inc. (CEVA)</b> Yaniv Arieli, CFO
8:30 AM	<b>SanDisk Corporation (SNDK)</b> Judy Bruner, EVP, Administration & CFO	8:30 AM	<b>Mellanox Technologies, Ltd. (MLNX)</b> Eyal Waldman, CEO Michael Gray, CFO
9:00 AM	<b>Emulex Corp. (ELX)</b> Jeff Benck, COO	9:00 AM	<b>Applied Micro Circuits (AMCC)</b> Bob Gargus, CFO
9:30 AM	<b>Vitesse Semiconductor (VTSS)</b> Christopher Gardner, CEO Rick Yonker, CFO	9:30 AM	<b>Virage Logic (VIRL)</b> Don McCranie, Executive Chairman
10:00 AM	<b>Standard Microsystems Corp (SMSC)</b> Kris Sennesael, CFO	10:00 AM	<b>Diodes Incorporated (DIOD)</b> Carl Wertz, VP Finance & Investor Relations
10:30 AM	<b>Cypress Semiconductor Corporation (CY)</b> Brad Buss, CFO	10:30 AM	<b>NetLogic Microsystems Inc. (NETL)</b> Mike Tate, Vice President & CFO
11:00 AM	<b>Conexant Systems, Inc. (CNXT)</b> Scott Mercer, CEO	11:00 AM	<b>Cirrus Logic Inc. (CRUS)</b> Jason Rhode, CEO Thurman Case, CFO
11:30 AM	<b>Pericom Semiconductor Corp. (PSEM)</b> Aaron Tachibana, CFO	11:30 AM	<b>STEC, Inc. (STEC)</b> Raymond Cook, CFO

**12:00 PM LUNCHEON & NETWORKING SESSION  
PROSPECT LOUNGE, 2nd FLOOR**

SESSION I Triangle Pass		SESSION II McCosh	
1:00 PM	<b>Integrated Silicon Solutions (ISSI)</b> Scott Howarth, President & CEO John Cobb, CFO	1:00 PM	<b>PLX Technology</b> Art Whipple, CFO
1:30 PM	<b>Mindspeed Technologies (MSPD)</b> Kurt Busch, SVP & GM of High-Performance Analog	1:30 PM	<b>MIPS Technologies</b> Sandeep Vij, CEO Maury Austin, CFO
2:00 PM	<b>Cavium Networks, Inc. (CAVM)</b> Rajiv Khemani, VP/GM, Networking Division	2:00 PM	<b>Qlogic Corp. (QLGC)</b> Simon Biddiscombe, CFO
2:30 PM	<b>Entropic Communications (ENTR)</b> Patrick Henry, CEO	2:30 PM	<b>Pixelworks Inc. (PXLW)</b> Steven Moore, CFO
3:00 PM	<b>Power Integrations inc. (POWI)</b> Balu Balakrishnan, President & CEO	3:00 PM	<b>Microsemi Corp (MSCC)</b> John Hohener, CFO Rob Adams, VP, Corporate Development

**PANEL DISCUSSION: Clean Tech - The Next Growth Driver for Semis?**  
Moderated by: Krishna Shankar, ThinkEquity

**PANELISTS:**

Balu Balakrishnan, President & CEO, Power Integrations  
Rod Edgerton, CEO, iWatt  
Rajiv Khemani, VP/GM, Networking Division, Cavium Networks, Inc.  
Bart Schachter, Managing Director, Investments/M&A, National Semiconductor  
Sandeep Vij, CEO, MIPS Technologies

**3:30 PM COCKTAIL RECEPTION  
4:30 PM JAMES MADISON ROOM, 2nd FLOOR**