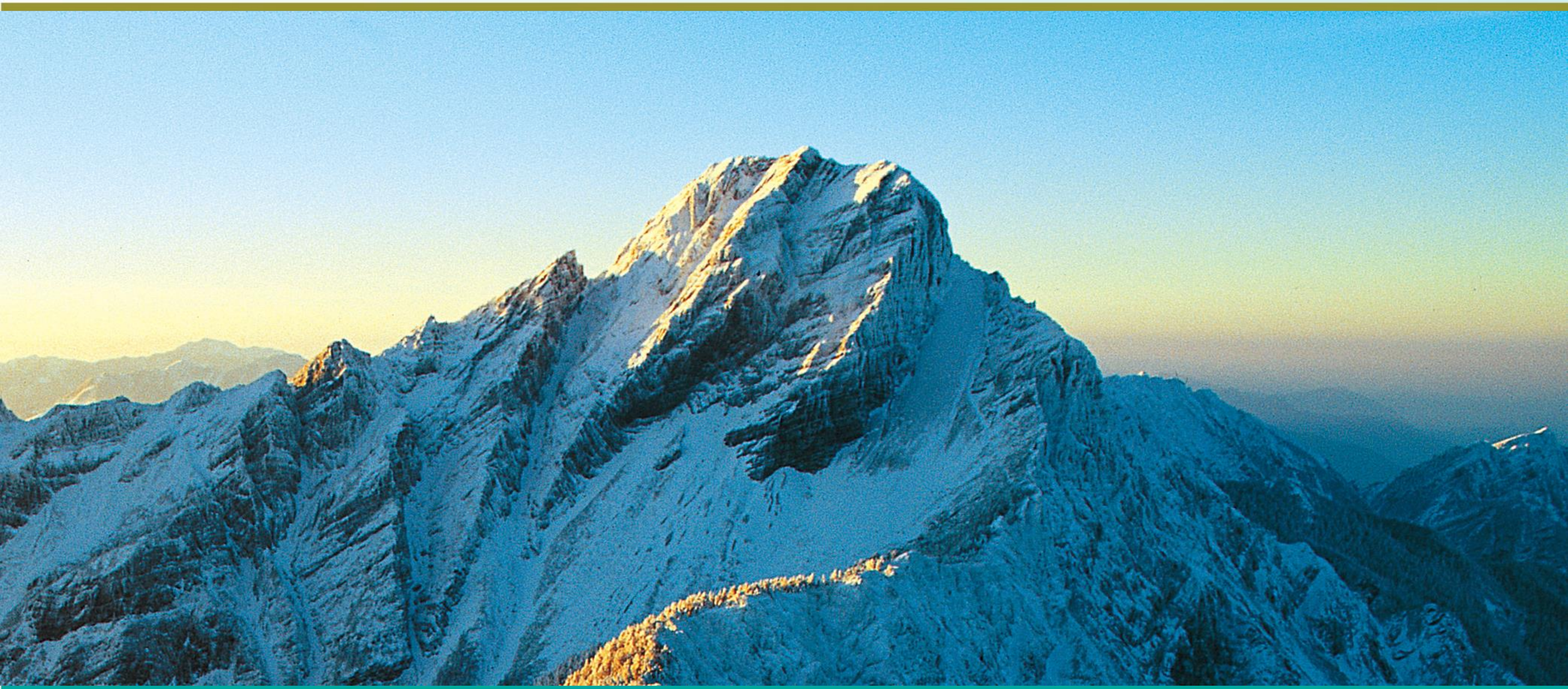
玉山金控 E.SUN FHC



# 玉山金控 2023 年第 2 季法人說明會

August 2023

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# 大綱

- 2023 年第 2 季財務績效表現
- 2023 年第 2 季業務發展概況
- 附件-金控及子公司損益表及資產負債表

# 全球總體經濟概況

## • 全球經濟不確定性仍高

- 歐美銀行危機緩解，加上通膨明顯回落，IMF 7月上修2023年全球經濟成長率至3%，惟去庫存時程延宕、俄烏戰爭持續、金融環境緊縮等因素，經濟前景不確定性高
- 美國經濟溫和成長，Q2經濟成長率2.4%，主因疫後服務業蓬勃，就業市場強勁，雖CPI由去年高點9.1%滑落至7月3.2%，但核心CPI 4.7%仍高，預期利率將維持高檔
- 中國內外需疲弱，H1經濟成長率5.5%。6月全國房產投資年減擴大至7.9%，青年失業率創新高至21.3%，預期將持續寬鬆及強化補貼措施
- 日本央行7月維持負利率政策，但YCC政策略微調，考量日本薪資逐步調漲，自2022/8起CPI皆逾3%，需留意後續貨幣政策動向

## • 台灣經濟倚靠內需支撐

- 主計總處持續下修台灣經濟成長率，2023年成長率下調至1.61%(5月估2.04%)，主因出口不振，加上前景不明導致企業投資趨保守
- 終端需求復甦緩慢，亞洲製造業疲弱，H1出口及外銷訂單各衰退18%及21%，觀察上市櫃電子業整體庫存已開始下降，惟仍較疫情前高，庫存調整將持續抑制出口表現
- 民間消費亮眼。H1零售銷售額年增9%，其中汽機車銷售年增21.1%、百貨公司銷售額年增23.5%，另餐飲業營業額年增27.2%，內需表現強勁
- 物價溫和成長。疫後服務業需求熱絡，人力短缺，服務類物價具支撐，加上電價調漲，7月CPI年增率1.88%，且核心CPI 2.72%尚未明顯下降

# 玉山金控整體概況

Unit : NT$ million

| | | 2023.6/1 | 2022.12/2 |
|---|---|---|---|
| 總資產 | 玉山金控 | 3,559,008 | 3,479,560 |
| | 玉山銀行 | 3,533,317 | 3,458,024 |
| | 玉山證券 | 21,270 | 17,797 |
| | 玉山創投 | 5,558 | 4,979 |
| 主要財務比率 | 金控每股淨值(新台幣元) | 14.76 | 13.80 |
| | 雙重槓桿比率 | 102.87% | 103.15% |
| | 金控資本適足率 | 138.66% | 127.54% |
| 實體通路 | 國內銀行通路 | 139 | 139 |
| | 海外據點 | Branch: HK, LA, Singapore, Vietnam, Myanmar, Tokyo, Fukuoka, Sydney, Brisbane<br>Subsidiary: China and Cambodia (UCB)<br>Rep office in Hanoi, HCM City, and Bangkok<br>31 overseas sites | |
| | 證券分公司 | 17 | 17 |

Note: 1. Preliminary figures of June 2023
2. Audit figures of Dec. 2022
3. Share owned by QFII: 31.57%, as of June 30, 2023

# 2023 年第 2 季財業務概況

## 金控獲利創歷年上半年新高

- 第 2 季金控自結淨收益 313.1 億元，稅後淨利 105.5 億元，較去年同期成長 48.9%，創歷年上半年獲利最高; 金控 EPS 0.72 元、ROE 10.06%、ROA 0.60%。
- 銀行稅後淨利 95.2 億元，年增 51.0%；其中海外分子行獲利大幅提升，占整體獲利33.2%。
- 截至前 7 月，玉山金控自結稅後淨利 122.7 億元，年增 24.3%。

## 各項業務穩健發展

- 淨手續費收入 101.2 億元 (+3.1%)，其中信用卡淨手收 33.8 億元 (+13.0%)，主要受惠於海外旅遊簽帳；財富管理淨手收 44.4 億元 (+9.0%)，AuM 1億元以上的顧客戶數及AuM均成長2成以上 。
- 上半年外匯、固收及其他收入 72.0 億元，大幅成長主因金融操作得宜及來自顧客flow的穩定獲利。
- 上半年調整存放款結構以提升存放利差，總放款成長 4.8%，SME 放款成長 6.2%；ESG永續授信餘額占整體法金放款35% 。(yoy)
- 長期保持優良資產品質，逾期放款比率 0.17%，逾期放款覆蓋率 690.6%。

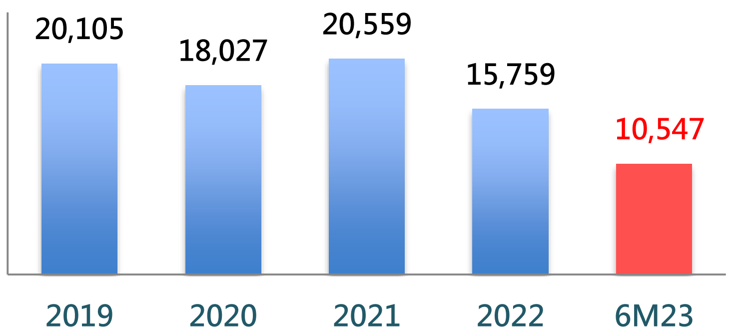
## 近期營運重點

- 海外布局：日本福岡分行成立，為玉山第31個海外據點，也是首家台資銀行在日本九州成立分行。
- 數位科技：首家金控設立「科技諮詢委員會」，延攬多位在人工智慧、數位賦能、電子商務、資訊安全領域專家，提升玉山金融科技競爭力。
- 喜悅與榮光：獲得《亞洲企業商會》「人力投資獎」及「企業永續報告獎」，董事長黃男州更連續6度榮獲「負責任商業領袖獎」，是該獎項設立以來最佳成績。
- ESG：金控 8 度獲「公司治理評鑑」前5%；銀行、證券亦同時榮獲金管會2023年公平待客評核佳績。

# 玉山金控獲利表現

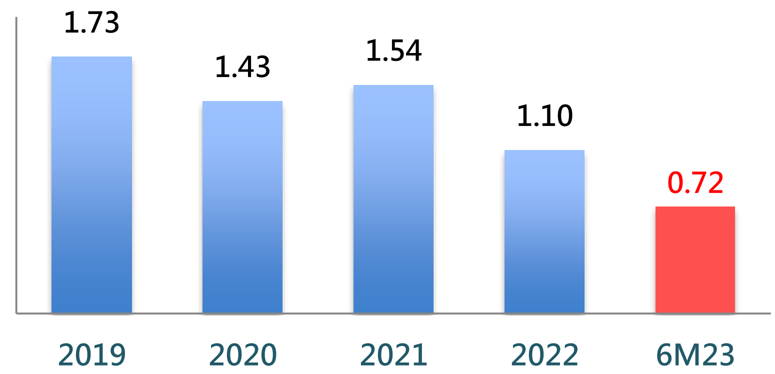
## 稅後淨利

Unit: NT$ million

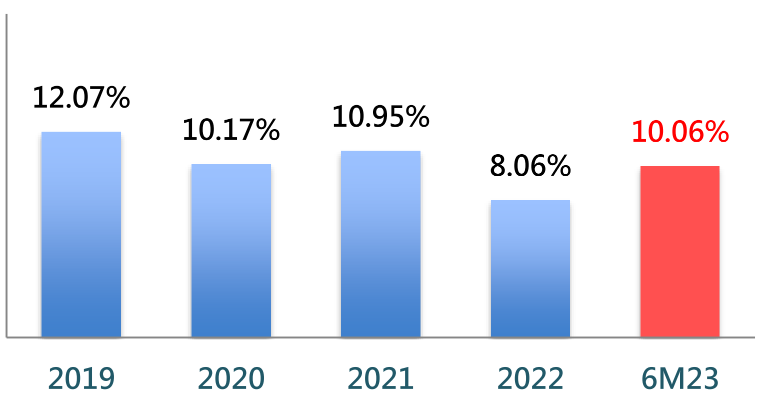



## EPS

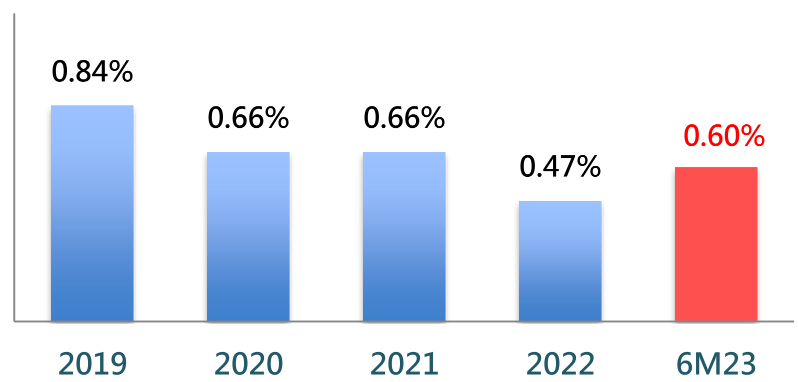
Unit: NT$ dollars




## ROE



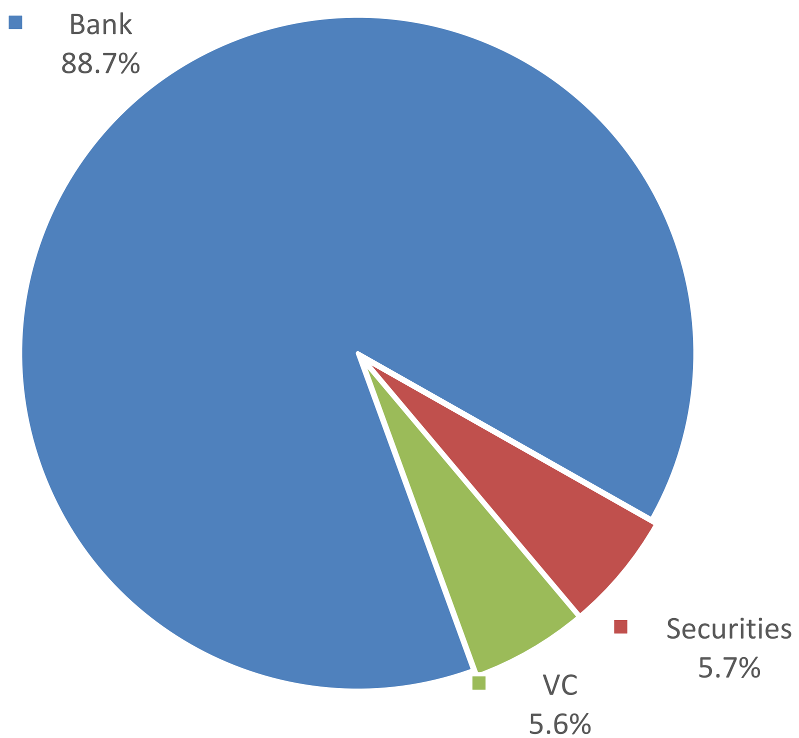

## ROA




Note: Preliminary figures of June 2023

# 玉山金控及子公司獲利結構

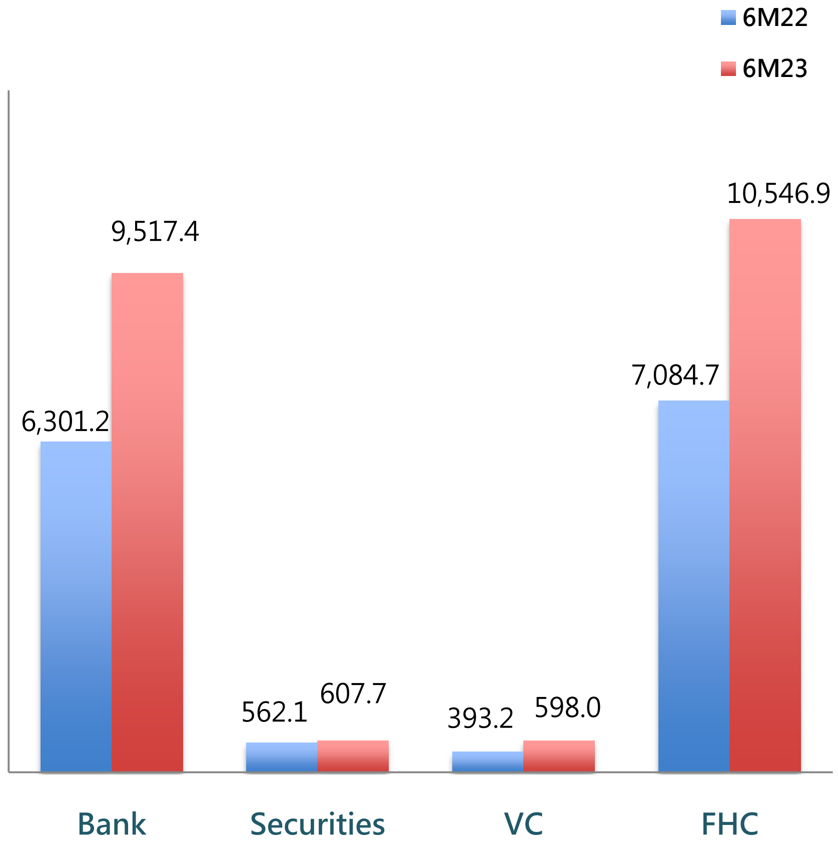
## 各子公司獲利貢獻




Note: Preliminary figures of June 2023

## 金控及子公司稅後淨利比較

Unit: NT$ million

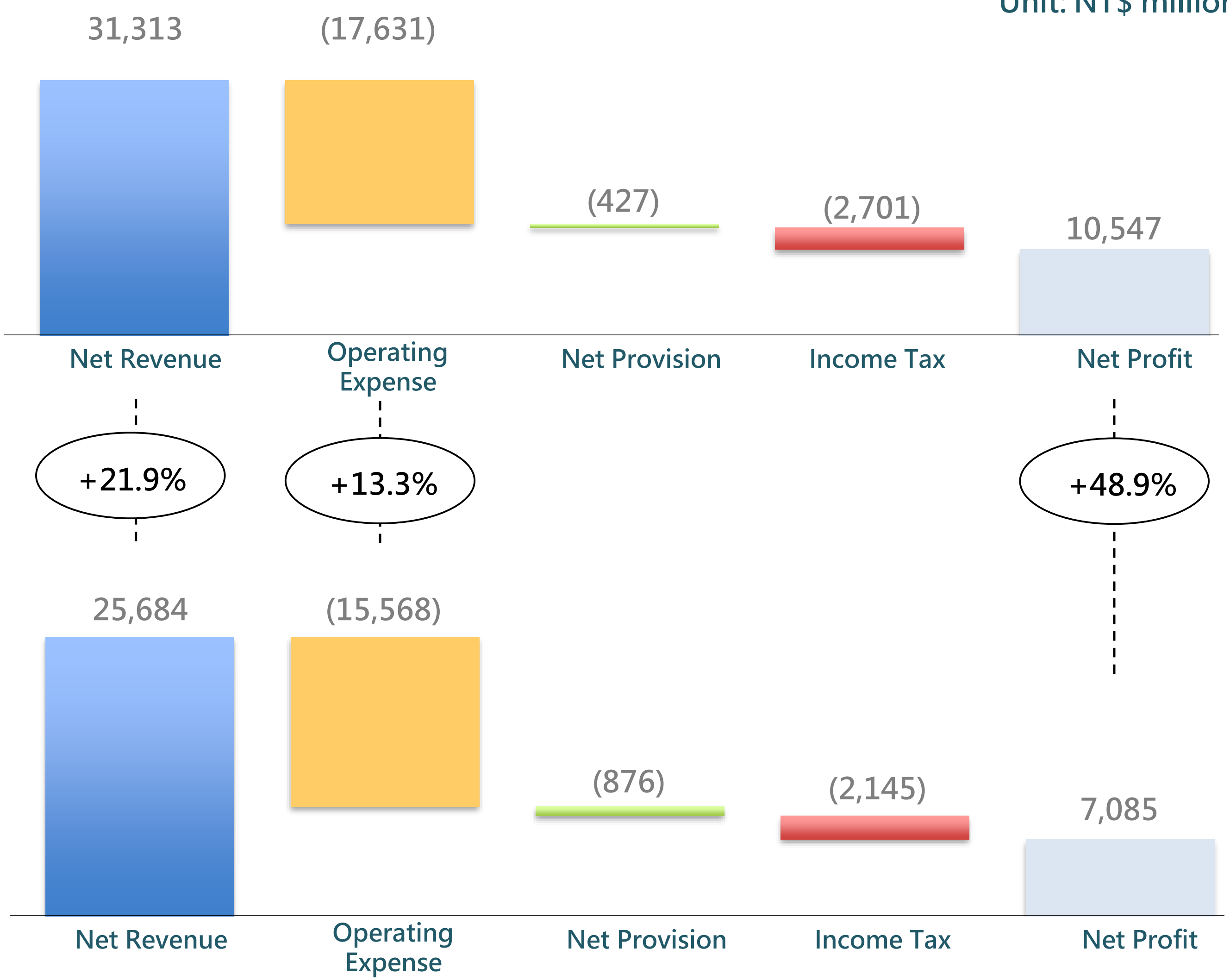


# 與去年同期獲利比較

Unit: NT$ million

6M23 P&L

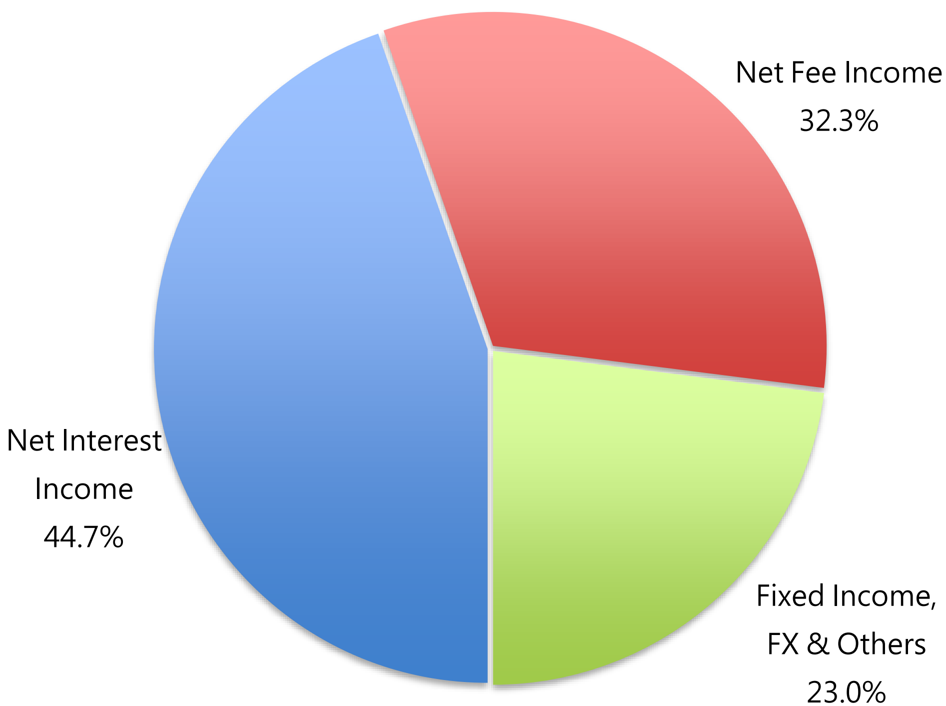
6M22 P&L




Note: Preliminary figures of June 2023

# 玉山金控淨收益結構

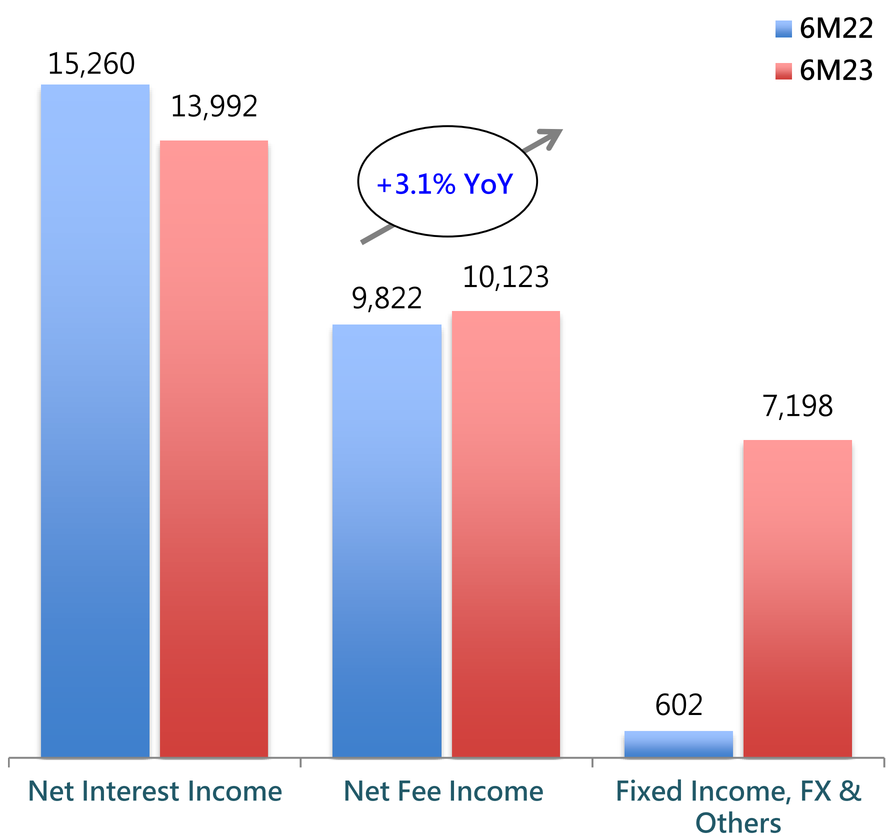
## 淨收益
## 新台幣313.1億元




Note: Preliminary figures of June 2023

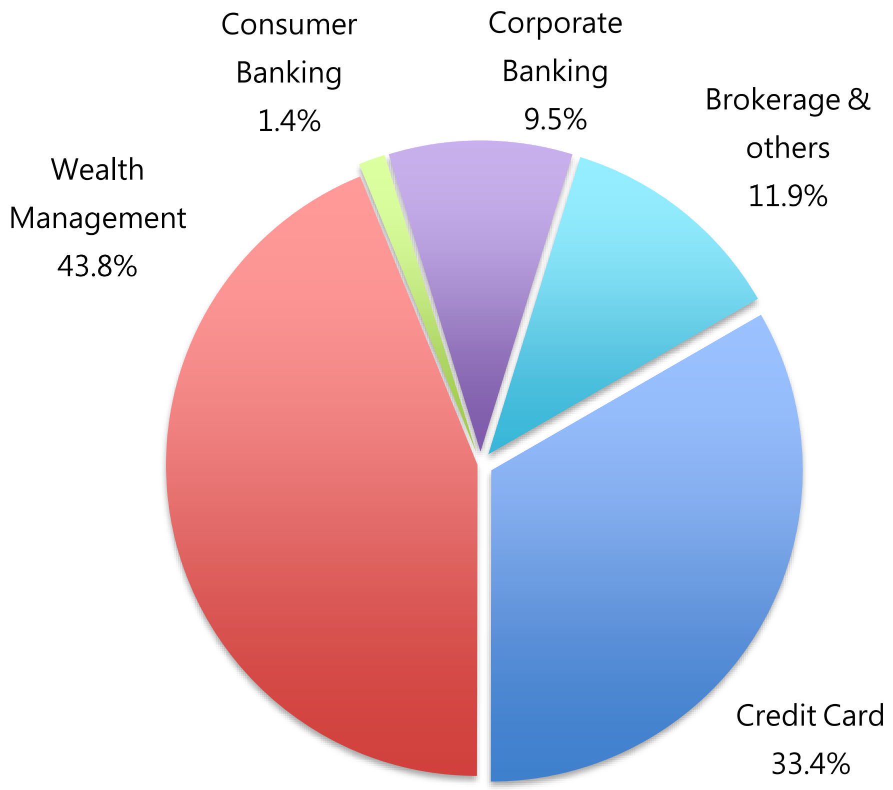
## 與去年同期比較

Unit: NT$ million



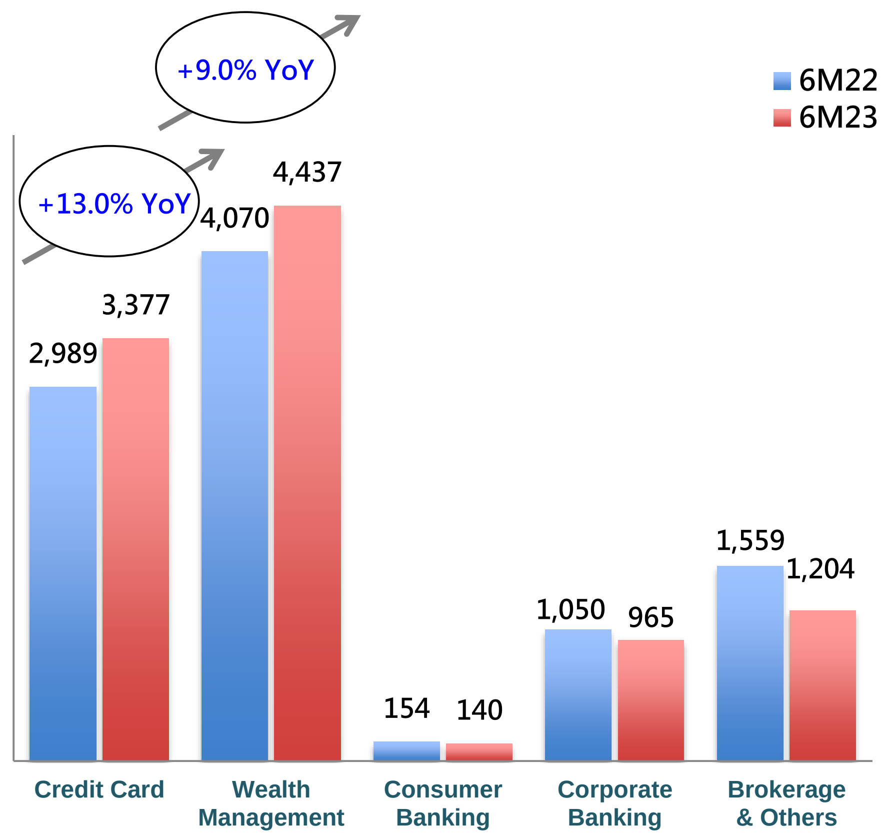
# 玉山金控淨手續費結構

**淨手續費收入**
**新台幣$ 101.2億元**




**與去年同期比較**

Unit: NT$ million

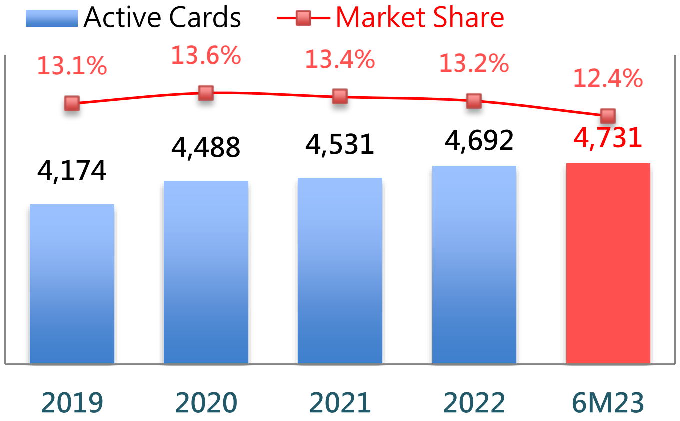



Note: Preliminary figures of June 2023

# 信用卡業務相關指標

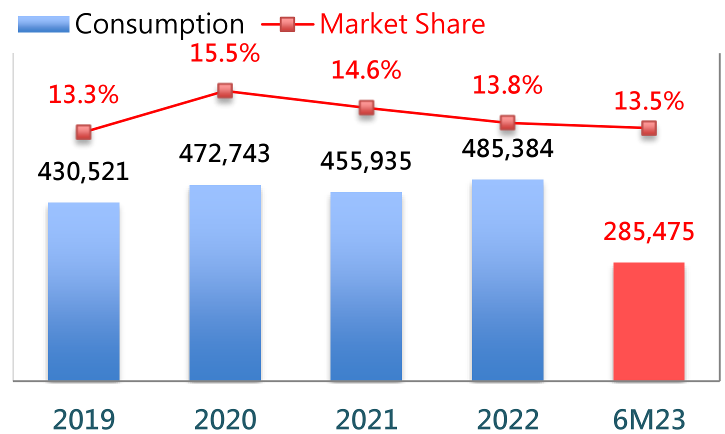
## Active Cards

Unit: Thousand Cards, %



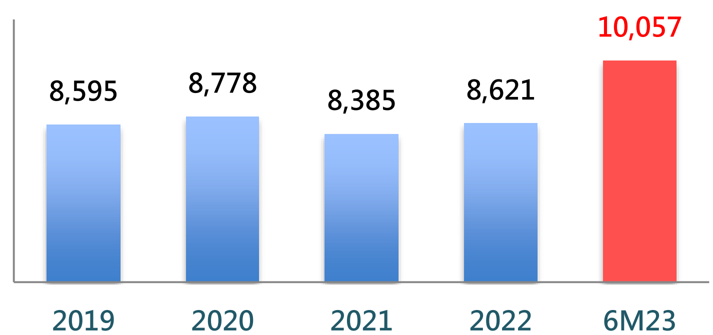

## Card Consumption

Unit: NT$ million



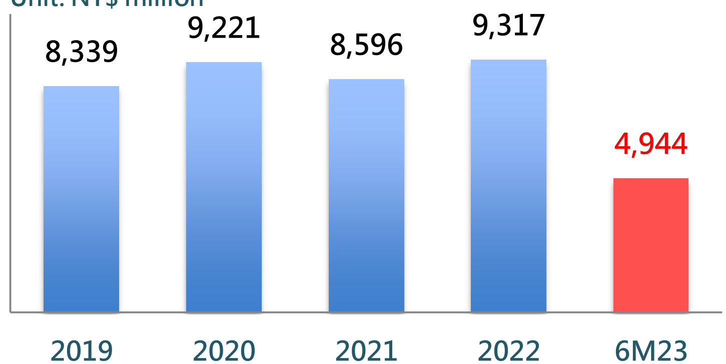

## Per Card Spending (Monthly)

Unit: NT$ dollar




## Gross Fee Income

Unit: NT$ million



# 主要存放款業務比較

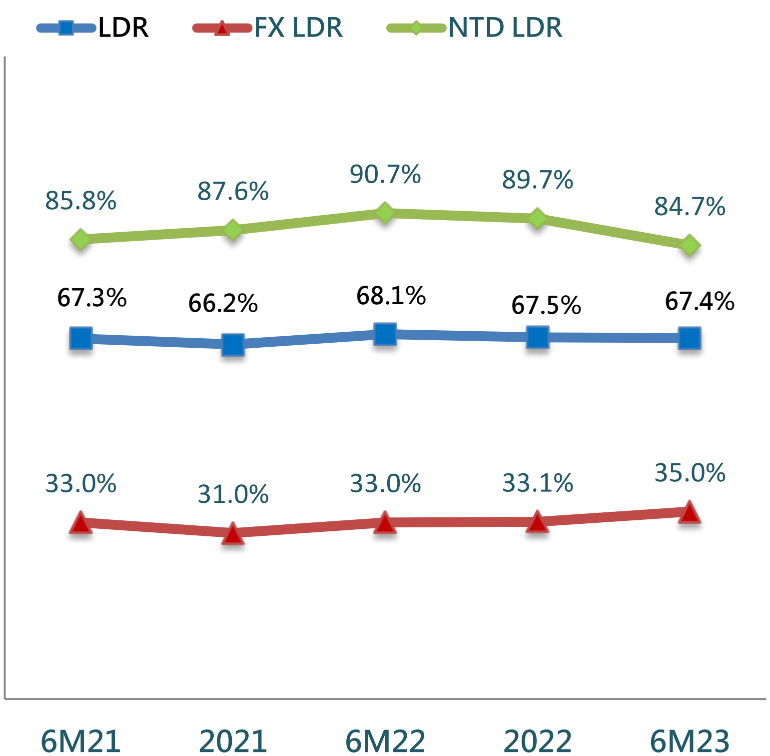
Unit: NT$ Bn

| Category | 2023.6 | QoQ Growth % | 2023.3 | Ytd Growth % | 2022.12 |
|---|---|---|---|---|---|
| 總存款 /1 | 2,948.0 | 2.9% | 2,865.0 | 1.6% | 2,902.7 |
| 台幣活期存款 | 1,109.9 | 1.8% | 1,090.5 | 0.7% | 1,102.1 |
| 台幣定期存款 | 809.2 | 10.6% | 731.8 | 22.0% | 663.1 |
| 外幣存款 | 1,028.9 | -1.3% | 1,042.6 | -9.5% | 1,137.5 |
| 總放款 /1, 2 | 1,986.3 | 1.7% | 1,953.3 | 1.4% | 1,959.1 |
| 企業放款 | 938.4 | 1.7% | 923.1 | 0.8% | 931.1 |
| 中小企業放款 | 516.7 | 1.7% | 507.9 | 2.1% | 506.0 |
| 外幣放款 /1, 2 | 360.4 | 1.3% | 355.6 | -4.2% | 376.3 |
| 個人放款 | 987.2 | 1.8% | 969.7 | 2.1% | 967.0 |
| 房屋貸款 | 490.4 | 1.8% | 481.8 | 2.1% | 480.1 |
| 小額信貸 | 122.8 | -1.9% | 125.2 | -5.9% | 130.5 |
| 信用卡循環額 | 12.7 | 0.0% | 12.7 | -4.5% | 13.3 |

Note: 1. E.SUN Bank Consolidated
2. Loan balance of subsidiaries NT$ 60.5 billion

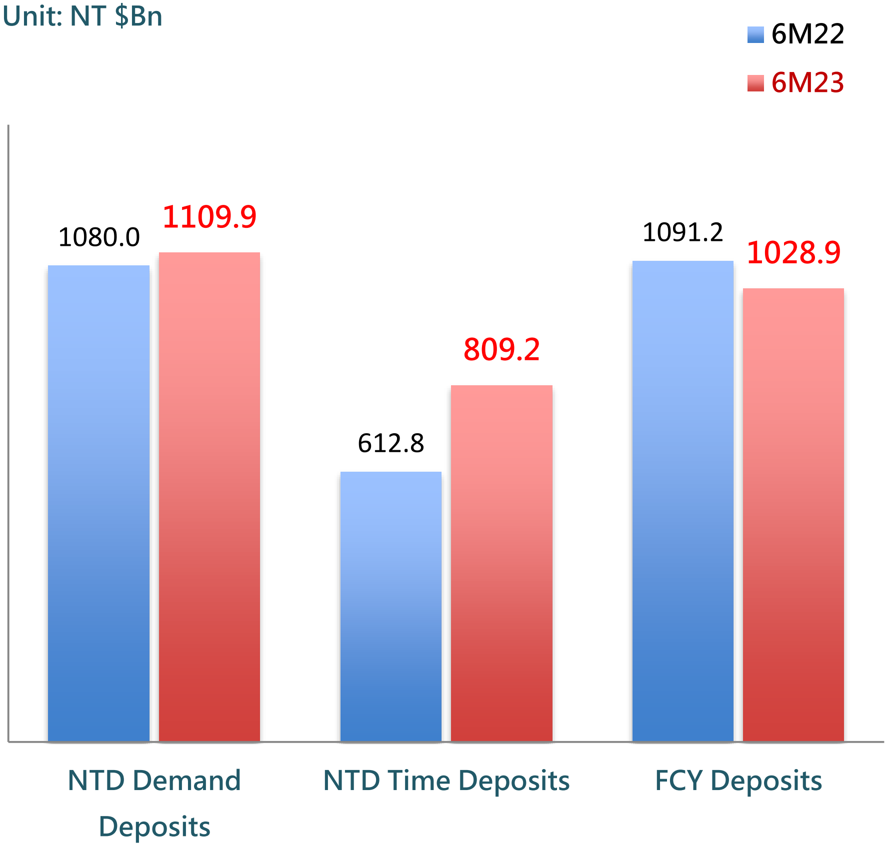
# 存款結構分析

## 存放比率



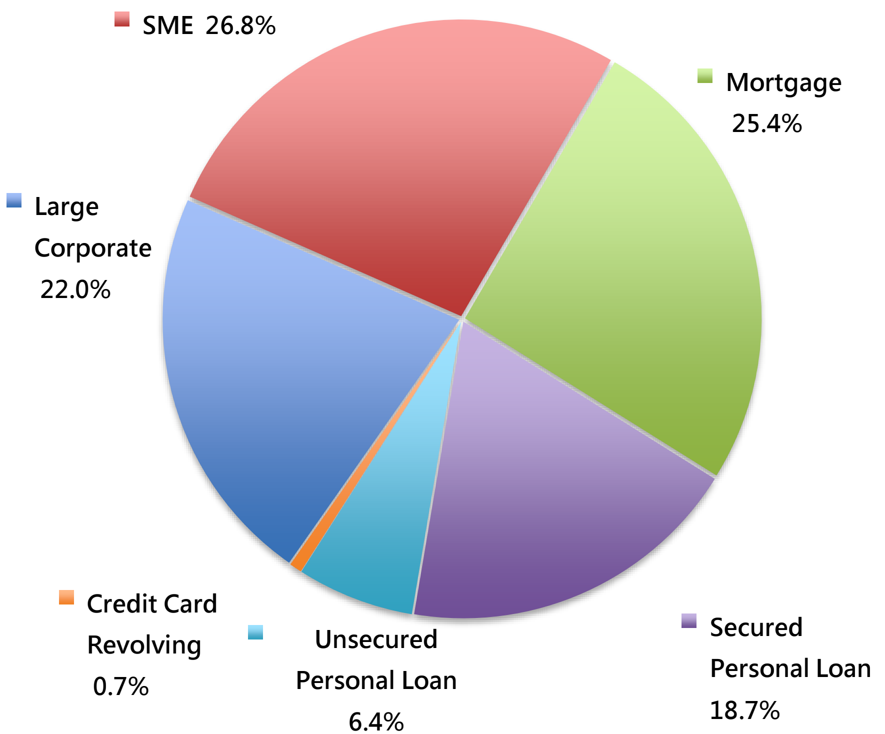

## 存款結構比較

Unit: NT $Bn



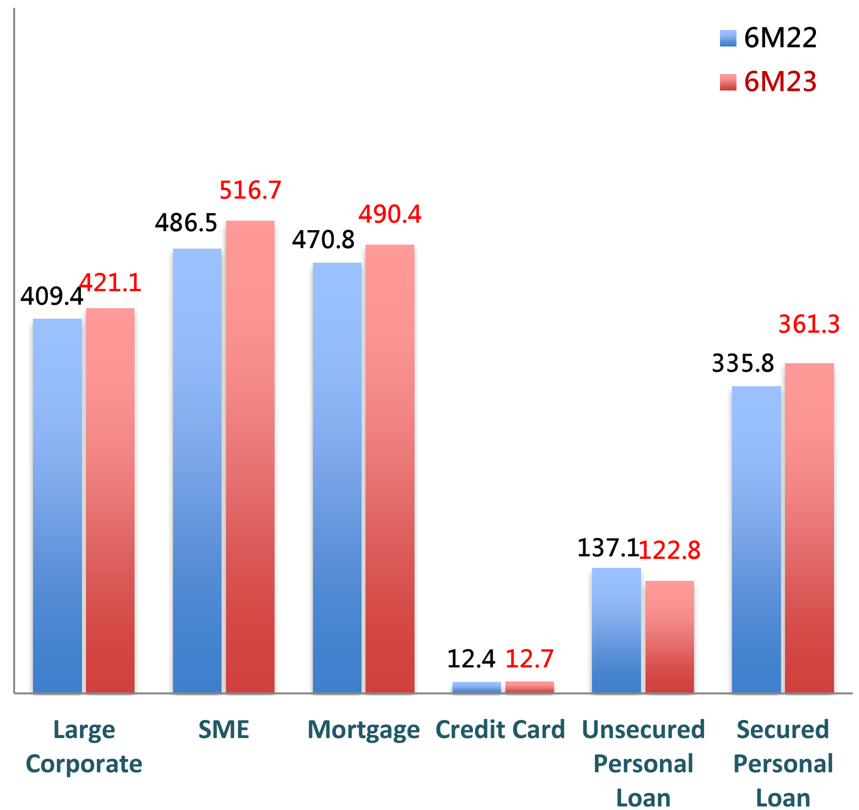
# 放款結構分析

## 放款總額
## 新台幣$ 1兆9,256億元




## YoY Comparison

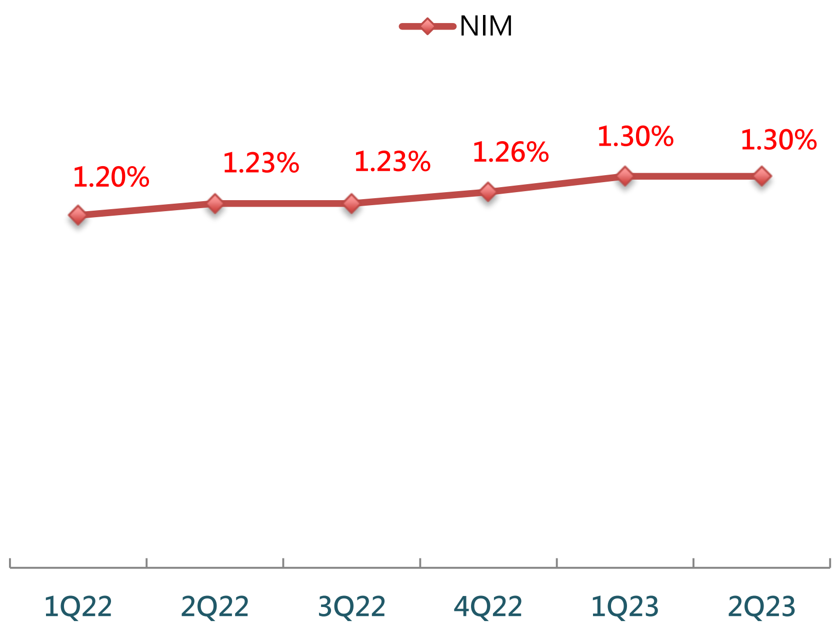
Unit: NT$ Bn



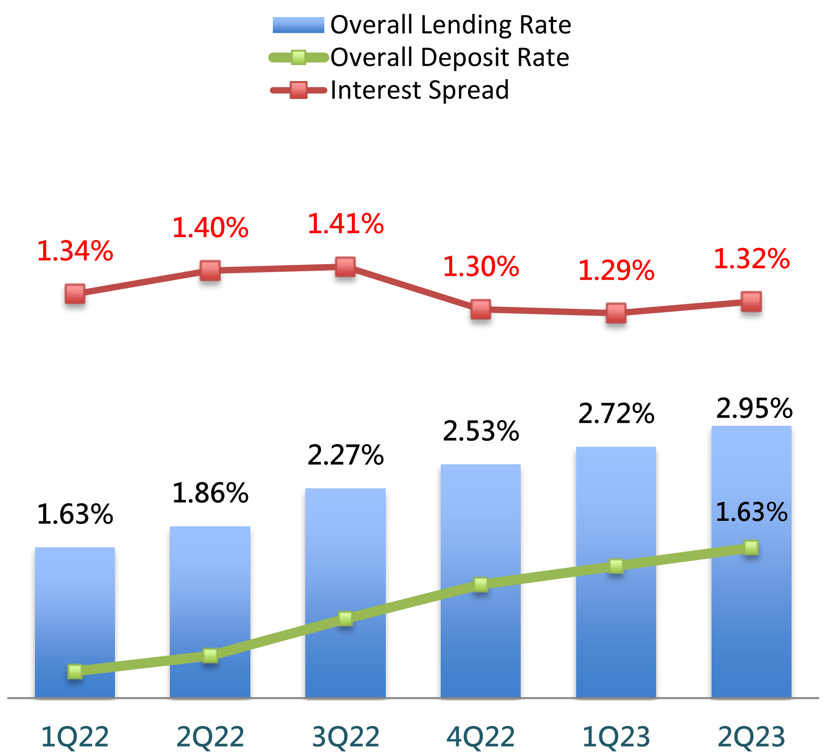

Note: 1. Secured Personal Loan is fully collateralized by fixed asset
2. Data of E.SUN Bank standalone

# NIM and Spread

## Quarterly Net Interest Margin



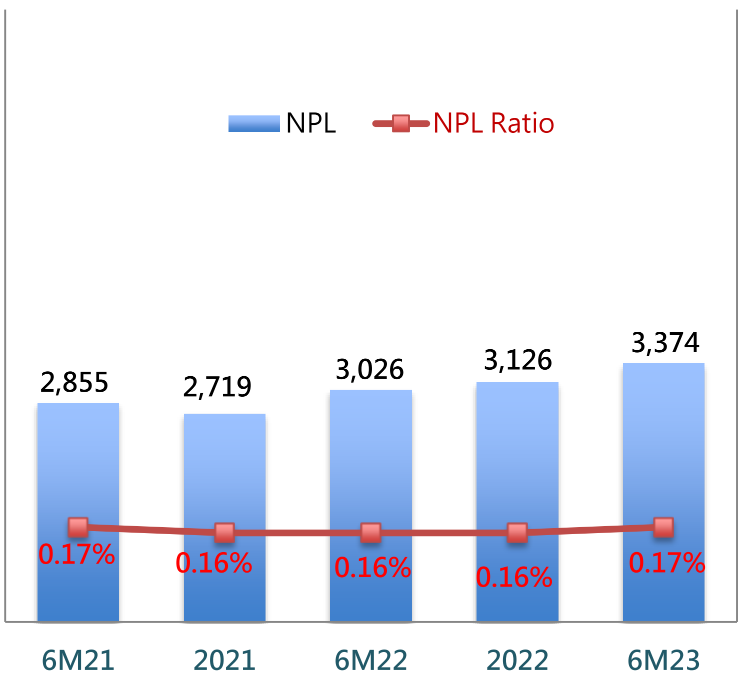

## Quarterly Interest Spread



# 優異的資產品質1/3

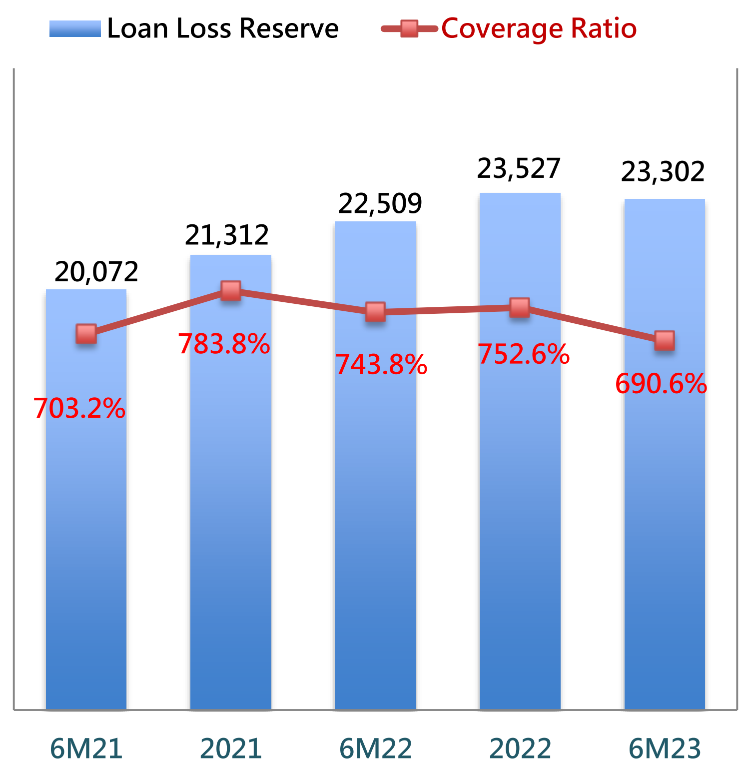
## NPL Ratio

Unit: NT$ million



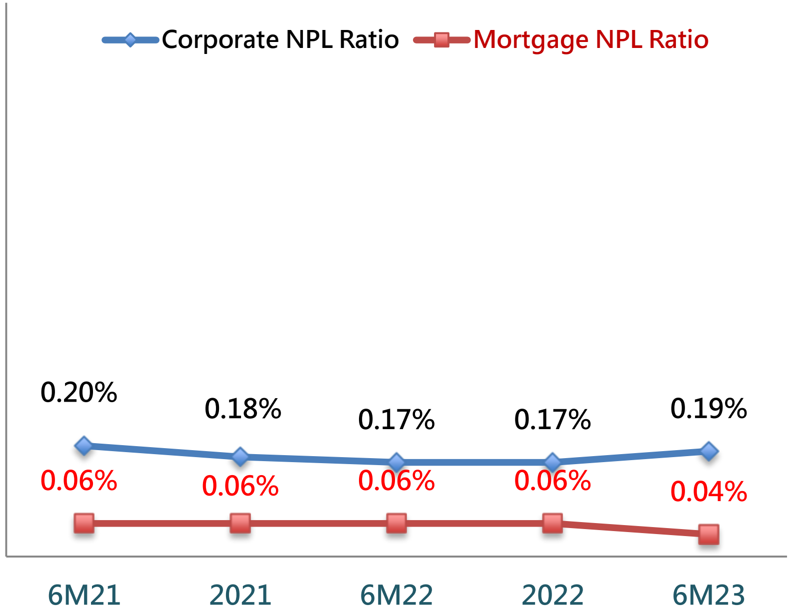

## Coverage Ratio

Unit: NT$ million



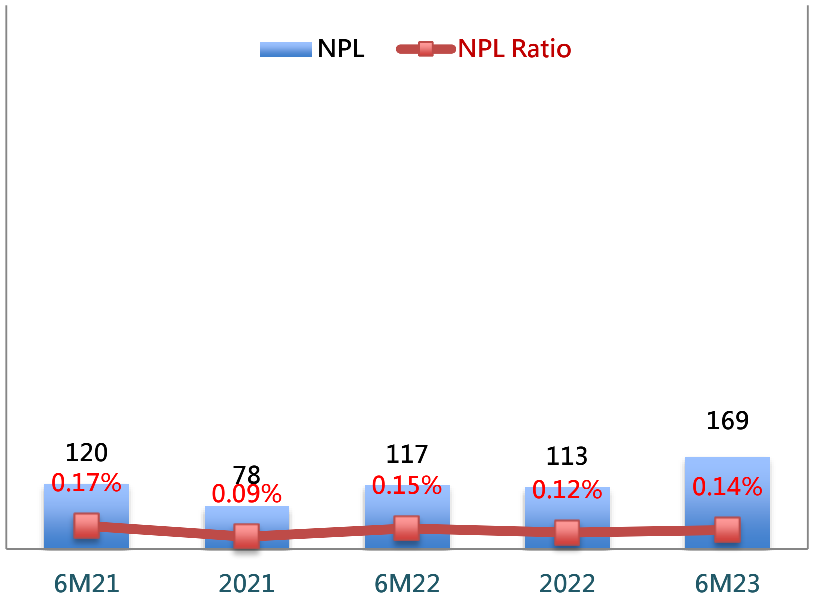

Note: Data of E.SUN Bank standalone

## NPL Ratio for Major Products




## NPL Ratio for Credit Card

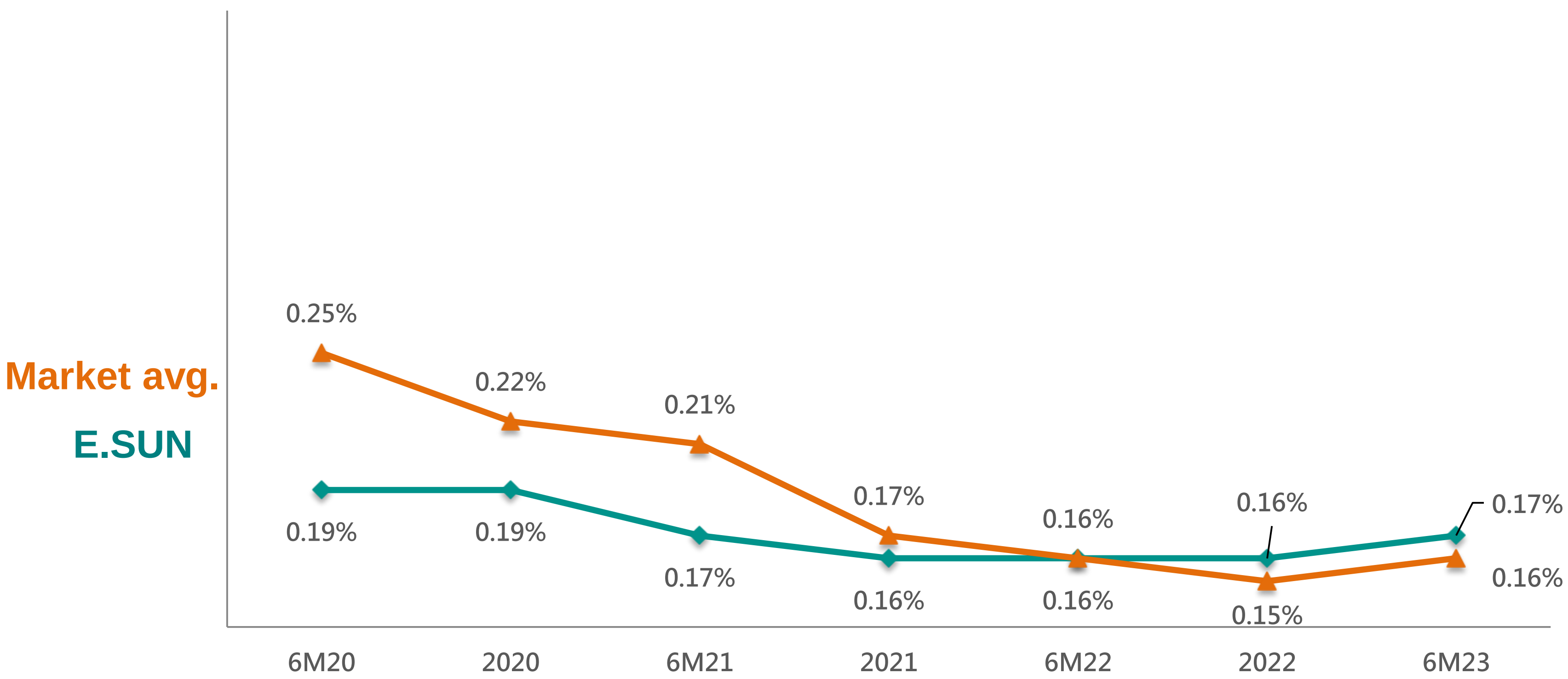
Unit: NT$ million




Note: Data of E.SUN Bank standalone

# 優異的資產品質3/3

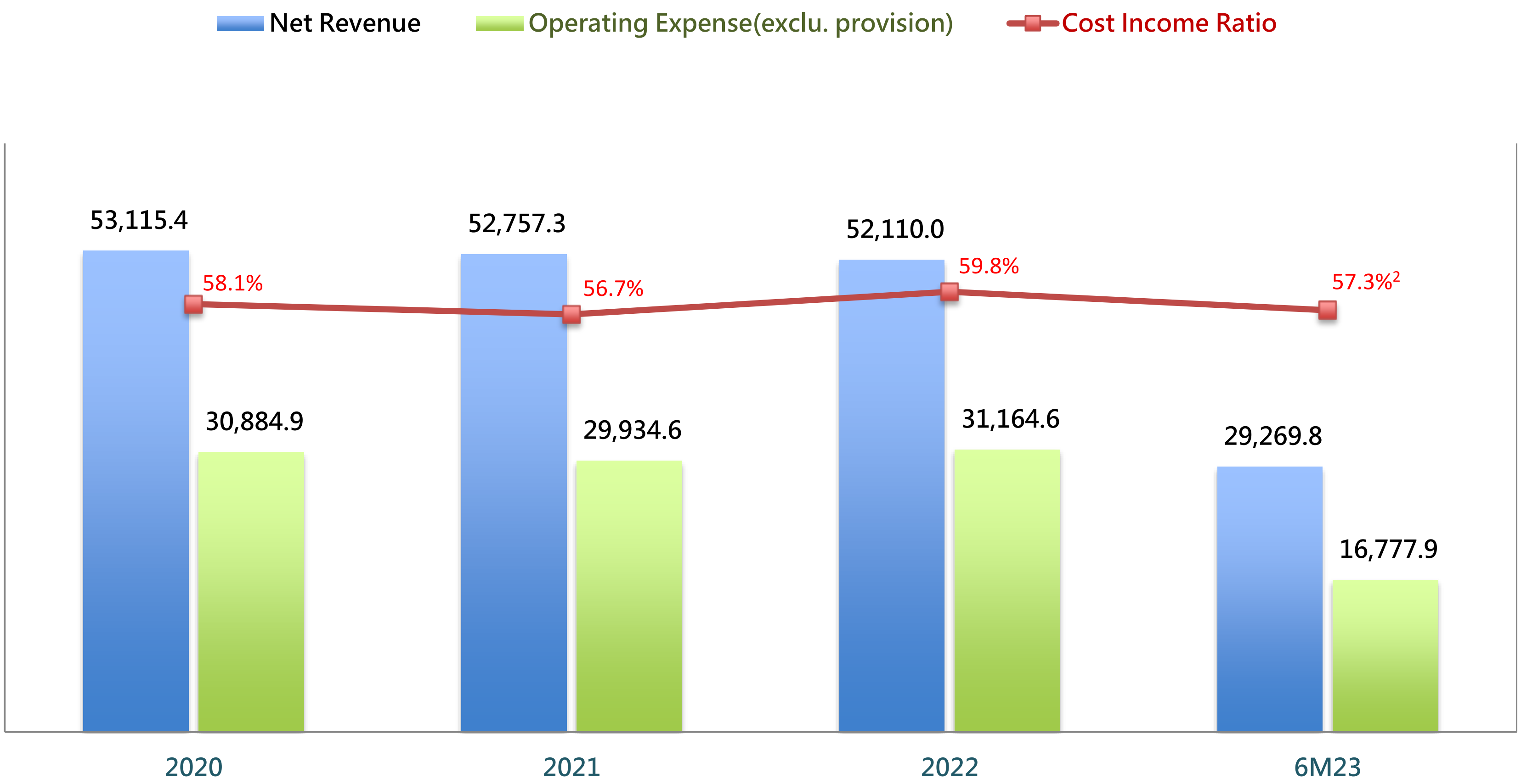
## NPL Comparison with Market




Source: FSC

# 成本效率比

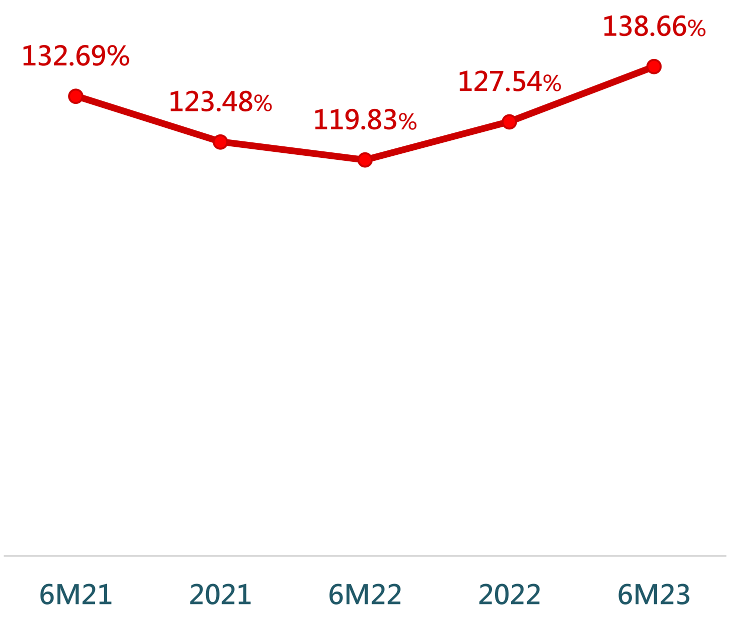
Unit: NT$ million



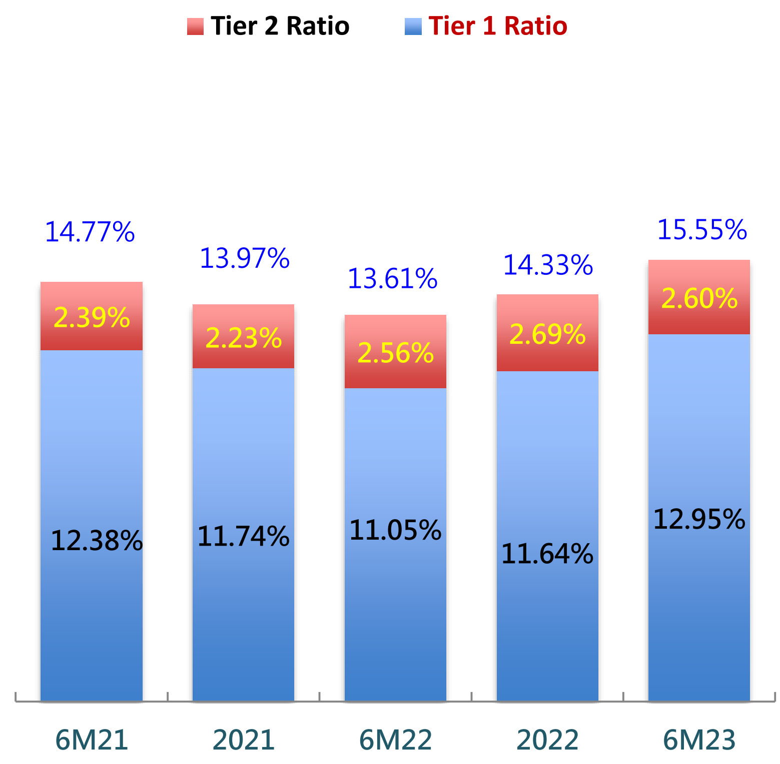

Note: 1. Data of E.SUN Bank
2. Preliminary figures of June 2023

# 資本適足率

## FHC CAR Ratio




## Bank BIS Ratio




Note: 1. Preliminary figures of June 2023
2. BIS of E.SUN Bank standalone

# 深化ESG價值 積極接軌國際標竿

**E**

- 金融業首家 零碳ATM 通過ISO 14067碳足跡認證
- 支持生物多樣性 贊助《消失的紫斑蝶》生態紀錄片
- 首創便利商店加盟主永續績效連結貸款

**S**

- 入選2023彭博性別平等指數 深獲國際肯定

**G**

- 8度榮獲「公司治理評鑑」前5%佳績

# 擴大 ESG 關注範疇 積極接軌國際標竿

## Honors and Recognitions

**DJSI**
2014-2022

**MSCI ESG Ratings**
2018-2022

**Coalition of Movers and Shakers**
2022

**Sustainalytics ESG Risk Ratings**
2022

**FTSE4Good**
2017-2023

## International ESG Standards

# Thank You

- If you wish to know more about E.SUN, please visit our website site (www.esunfhc.com.tw) for more information.

- If you have further questions, please feel free to contact us through email or conference call

- For more information, please contact
  Investor Relations Department
  +8862 2175 1313 Ext 9347, 9302
  ir@email.esunbank.com.tw

# Balance Sheet of E.SUN FHC and its subsidiaries as of June 30, 2023

| NT$ million | E.SUN Bank (Consolidated) | E.SUN Securities (Consolidated) | E.SUN Venture Capital | E.SUN FHC (Standalone) | E.SUN FHC (Consolidated) |
|---|---|---|---|---|---|
| Assets： | | | | | |
| Cash and due from banks | 243,548 | 1,358 | 417 | 2,340 | 244,362 |
| Securities, net | 1,053,381 | 2,624 | 5,113 | 121 | 1,061,230 |
| Loans, net | 1,961,986 | - | - | - | 1,961,986 |
| A/R, net | 143,223 | 13,455 | 3 | 833 | 156,386 |
| Land, premises and equipments, net | 34,082 | 383 | 2 | 2 | 34,808 |
| Others | 97,097 | 3,450 | 23 | 230,814 | 100,236 |
| Total assets | 3,533,317 | 21,270 | 5,558 | 234,110 | 3,559,008 |
| | | | | | |
| Liabilities: | | | | | |
| Deposits | 2,947,969 | - | - | - | 2,944,635 |
| Other liabilities | 368,740 | 14,400 | 114 | 11,624 | 391,713 |
| Total liabilities | 3,316,709 | 14,400 | 114 | 11,624 | 3,336,348 |
| Total stockholders' equity | 216,608 | 6,870 | 5,444 | 222,486 | 222,660 |
| Total equity attributable to owners of the company | 216,423 | 6,870 | 5,444 | 222,486 | 222,486 |
| Non-Controlling interests | 185 | - | - | - | 174 |
| Total liabilities andstockholders' equity | 3,533,317 | 21,270 | 5,558 | 234,110 | 3,559,008 |

Note: Preliminary figures of June 2023

# Appendix 2/6

## P&L of E.SUN FHC and its subsidiaries for 6M2023

| NT$ million | E.SUN Bank (Consolidated) | E.SUN Securities (Consolidated) | E.SUN Venture Capital | E.SUN FHC (Standalone) | E.SUN FHC (consolidated) |
|---|---|---|---|---|---|
| Operating income | | | | | |
| Net interest income | 13,823 | 183 | 1 | (16) | 13,992 |
| Net fee income | 9,026 | 1,100 | - | - | 10,123 |
| Net trading income/(loss) & Derivatives & FX | 6,331 | 152 | 633 | 0 | 7,116 |
| Others | 90 | 87 | 1 | 10,767 | 82 |
| Total Net Revenues | 29,270 | 1,522 | 635 | 10,751 | 31,313 |
| Allowance for bad-debt expenses | (428) | 1 | 0 | 0 | (427) |
| Operating expenses | (16,778) | (808) | (20) | (167) | (17,631) |
| Income before income tax | 12,064 | 715 | 615 | 10,584 | 13,255 |
| Income tax expenses | (2,539) | (107) | (17) | (37) | (2,701) |
| Net Income | 9,525 | 608 | 598 | 10,547 | 10,554 |
| Attributable to owners of the company | 9,517 | 608 | 598 | 10,547 | 10,547 |
| Non-controlling interests | 8 | 0 | 0 | 0 | 7 |

Note: Preliminary figures of June 2023

# E.SUN FHC's Balance Sheet (Consolidated)

| NT$ million | Yearly Results 2020 | 2021 | 2022 | Quarterly Results Mar 22 | Jun 22 | Sep 22 | Dec 22 | Mar 23 | Jun 23 |
|---|---|---|---|---|---|---|---|---|---|
| Assets : | | | | | | | | | |
| Cash and due from banks | 175,722 | 210,608 | 229,134 | 208,307 | 198,487 | 255,725 | 229,134 | 210,227 | 244,362 |
| Securities, net | 998,478 | 1,037,395 | 1,055,846 | 1,028,826 | 1,013,388 | 990,267 | 1,055,846 | 1,050,956 | 1,061,230 |
| Loans, net | 1,620,374 | 1,768,641 | 1,934,792 | 1,826,344 | 1,872,442 | 1,917,410 | 1,934,792 | 1,929,348 | 1,961,986 |
| A/R, net | 116,686 | 124,412 | 125,989 | 119,207 | 116,586 | 129,843 | 125,989 | 118,966 | 156,386 |
| Land, premises and equipments, net | 33,291 | 33,881 | 34,709 | 34,078 | 34,036 | 34,325 | 34,709 | 34,598 | 34,808 |
| Others | 27,194 | 55,971 | 99,090 | 75,752 | 108,375 | 164,094 | 99,090 | 83,176 | 100,236 |
| Total assets | 2,971,745 | 3,230,908 | 3,479,560 | 3,292,514 | 3,343,314 | 3,491,664 | 3,479,560 | 3,427,271 | 3,559,008 |
| Liabilities: | | | | | | | | | |
| Deposits | 2,484,605 | 2,693,343 | 2,900,914 | 2,711,688 | 2,774,699 | 2,852,345 | 2,900,914 | 2,863,518 | 2,944,635 |
| Other liabilities | 305,539 | 343,180 | 381,555 | 384,372 | 384,892 | 453,741 | 381,555 | 358,870 | 391,713 |
| Total liabilities | 2,790,144 | 3,036,523 | 3,282,469 | 3,096,060 | 3,159,591 | 3,306,086 | 3,282,469 | 3,222,388 | 3,336,348 |
| Total stockholders' equity | 181,601 | 194,385 | 197,091 | 196,454 | 183,723 | 185,578 | 197,091 | 204,883 | 222,660 |
| Total equity attributable to owners of the company | 181,469 | 194,226 | 196,926 | 196,294 | 183,572 | 185,424 | 196,926 | 204,714 | 222,486 |
| Non-Controlling interests | 132 | 159 | 165 | 160 | 151 | 154 | 165 | 169 | 174 |
| Total liabilities andstockholders' equity | 2,971,745 | 3,230,908 | 3,479,560 | 3,292,514 | 3,343,314 | 3,491,664 | 3,479,560 | 3,427,271 | 3,559,008 |

Note: Preliminary figures of June 2023

# Appendix 4/6

## E.SUN FHC's P&L account (Consolidated)

| NT$ million | Yearly Results 2020 | 2021 | 2022 | Quarterly Results 1Q22 | 2Q22 | 3Q22 | 4Q22 | 1Q23 | 2Q23 |
|---|---|---|---|---|---|---|---|---|---|
| Operating income | | | | | | | | | |
| Net interest income | 21,339 | 25,984 | 29,618 | 7,384 | 7,876 | 7,756 | 6,602 | 6,624 | 7,368 |
| Fee income | 19,831 | 21,324 | 19,280 | 5,173 | 4,649 | 4,728 | 4,730 | 4,943 | 5,180 |
| Net trading income/(loss) & Derivatives & FX | 14,707 | 10,366 | 5,743 | 936 | (477) | 1,800 | 3,484 | 4,200 | 2,916 |
| Others | 372 | 223 | 165 | 58 | 85 | 64 | (42) | 33 | 49 |
| Total Net Revenues | 56,249 | 57,897 | 54,806 | 13,551 | 12,133 | 14,348 | 14,774 | 15,800 | 15,513 |
| Allowance for bad-debt expenses | (3,226) | (2,130) | (2,077) | (344) | (532) | (615) | (586) | 2 | (429) |
| Operating expenses | (32,494) | (31,808) | (32,826) | (7,868) | (7,700) | (8,131) | (9,127) | (8,266) | (9,365) |
| Income before income tax | 20,529 | 23,959 | 19,903 | 5,339 | 3,901 | 5,602 | 5,061 | 7,536 | 5,719 |
| Income tax expenses | (2,481) | (3,373) | (4,122) | (1,012) | (1,133) | (1,037) | (940) | (1,489) | (1,212) |
| Net Income | 18,048 | 20,586 | 15,781 | 4,327 | 2,768 | 4,565 | 4,121 | 6,047 | 4,507 |
| Income Attributable to owners of the company | 18,027 | 20,559 | 15,759 | 4,325 | 2,760 | 4,563 | 4,111 | 6,042 | 4,505 |
| Non-Controlling interests | 21 | 27 | 22 | 2 | 8 | 2 | 10 | 5 | 2 |

Note: Preliminary figures of June 2023

# Appendix 5/6

## E.SUN Bank's Balance Sheet (Consolidated)

| | Yearly Results | | | Quarterly Results | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| NT$ million | 2020 | 2021 | 2022 | Mar 22 | Jun 22 | Sep 22 | Dec 22 | Mar 23 | Jun 23 |
| Assets： | | | | | | | | | |
| Cash and due from banks | 175,678 | 210,382 | 228,865 | 207,909 | 198,314 | 255,395 | 228,865 | 209,960 | 243,548 |
| Securities, net | 970,129 | 1,030,673 | 1,049,340 | 1,021,388 | 1,006,447 | 983,563 | 1,049,340 | 1,043,731 | 1,053,381 |
| Loans, net | 1,620,374 | 1,768,641 | 1,934,792 | 1,826,344 | 1,872,442 | 1,917,410 | 1,934,792 | 1,929,348 | 1,961,986 |
| A/R, net | 102,012 | 108,589 | 115,768 | 102,984 | 103,001 | 117,389 | 115,768 | 106,993 | 143,223 |
| Land, premises and equipments, net | 32,689 | 33,266 | 34,067 | 33,475 | 33,431 | 33,699 | 34,067 | 33,961 | 34,082 |
| Others | 46,097 | 44,566 | 95,192 | 71,903 | 104,888 | 160,200 | 95,192 | 79,815 | 97,097 |
| Total assets | 2,946,979 | 3,196,117 | 3,458,024 | 3,264,003 | 3,318,523 | 3,467,656 | 3,458,024 | 3,403,808 | 3,533,317 |
| Liabilities: | | | | | | | | | |
| Deposits | 2,486,232 | 2,696,351 | 2,902,696 | 2,713,813 | 2,784,022 | 2,854,324 | 2,902,696 | 2,864,964 | 2,947,969 |
| Other liabilities | 282,949 | 311,650 | 363,783 | 361,155 | 356,452 | 433,404 | 363,783 | 340,406 | 368,740 |
| Total liabilities | 2,769,181 | 3,008,001 | 3,266,479 | 3,074,968 | 3,140,474 | 3,287,728 | 3,266,479 | 3,205,370 | 3,316,709 |
| Total stockholders' equity | 177,798 | 188,116 | 191,545 | 189,035 | 178,049 | 179,928 | 191,545 | 198,438 | 216,608 |
| Total equity attributable to owners of the company | 177,657 | 187,947 | 191,370 | 188,864 | 177,888 | 179,765 | 191,370 | 198,258 | 216,423 |
| Non-Controlling interests | 141 | 169 | 175 | 171 | 161 | 163 | 175 | 180 | 185 |
| Total liabilities andstockholders' equity | 2,946,979 | 3,196,117 | 3,458,024 | 3,264,003 | 3,318,523 | 3,467,656 | 3,458,024 | 3,403,808 | 3,533,317 |

Note: Preliminary figures of June 2023

# Appendix 6/6

## E.SUN Bank's P&L account (Consolidated)

| NT$ million | Yearly Results 2020 | Yearly Results 2021 | Yearly Results 2022 | Quarterly Results 1Q22 | Quarterly Results 2Q22 | Quarterly Results 3Q22 | Quarterly Results 4Q22 | Quarterly Results 1Q23 | Quarterly Results 2Q23 |
|---|---|---|---|---|---|---|---|---|---|
| Operating income | | | | | | | | | |
| Net interest income | 21,095 | 25,591 | 29,239 | 7,278 | 7,772 | 7,670 | 6,519 | 6,547 | 7,276 |
| Fee income | 18,044 | 18,289 | 17,135 | 4,567 | 4,073 | 4,216 | 4,279 | 4,425 | 4,601 |
| Net trading income/(loss) & Derivatives & FX | 13,593 | 8,647 | 5,564 | 485 | (529) | 1,958 | 3,650 | 3,800 | 2,531 |
| Others | 383 | 230 | 172 | 60 | 88 | 66 | (42) | 35 | 55 |
| Total Net Revenues | 53,115 | 52,757 | 52,110 | 12,390 | 11,404 | 13,910 | 14,406 | 14,807 | 14,463 |
| Allowance for bad-debt expenses | (3,241) | (2,134) | (2,081) | (345) | (532) | (617) | (587) | 1 | (429) |
| Operating expenses | (30,885) | (29,935) | (31,164) | (7,421) | (7,303) | (7,694) | (8,746) | (7,869) | (8,909) |
| Income before income tax | 18,989 | 20,688 | 18,865 | 4,625 | 3,568 | 5,599 | 5,073 | 6,939 | 5,125 |
| Income tax expenses | (2,501) | (3,101) | (4,032) | (950) | (931) | (1,151) | (1,000) | (1,436) | (1,103) |
| Net Income | 16,488 | 17,587 | 14,833 | 3,675 | 2,637 | 4,448 | 4,073 | 5,503 | 4,022 |
| Attributable to owners of the company | 16,465 | 17,559 | 14,809 | 3,674 | 2,627 | 4,445 | 4,063 | 5,498 | 4,019 |
| Non-controlling interests | 23 | 28 | 24 | 1 | 10 | 3 | 10 | 5 | 3 |

Note: Preliminary figures of June 2023