COMPANY UPDATE

2026. 5. 18

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Nextin (348210)

Sales to trend higher

- Nextin's 1Q results were disappointing due to the dearth of equipment sales.
- Earnings should improve gradually on resumption of KROKY sales from 2Q.
- Two things to watch in 2H are whether the firm will restart exports to China and supply new equipment to new clients.

WHAT'S THE STORY?

1Q review: Nextin's 1Q sales tumbled 50% q-q as the company delivered just one AEGIS equipment to a domestic client. Its operating loss of KRW5.5b was larger than consensus due to the reduced sales, heavier fixed-cost burden, and stock-based compensation expense (one-off). Yet, the amount of net loss was smaller than consensus, largely due to the difficulty of estimating corporate taxes following continued losses. On a positive note, the company secured KRW21b in new orders.

2026 earnings outlook: The company's operating results should rebound gradually from 2Q. Sales from the KRW10.6b equipment contract with SK Hynix (signed in March) should be recognized over 2Q and 3Q. The Korean chipmaker is also planning to expand its commodity DRAM production capacity and migrate to 1c technology, which could lead to additional orders. As of end-1Q, Nextin's order backlog totaled KRW25.7b; even after recognizing the SK Hynix contract sales, KRW15.1b in order backlogs remains. That said, meaningful topline growth should hinge on restarting exports to China. No new orders have been announced yet, and given typical lead times, sales from this segment should begin from 3Q, at the earliest. Another thing to watch is upcoming equipment evaluations with potential new clients.

(Continued on the next page)

AT A GLANCE

BUY

Target price	KRW100,000	56%
Current price	KRW64,100	
Market cap	KRW671.58b/USD447.48m	
Shares (float)	10,477,005 (70.8%)	
52-week high/low	KRW98,500/KRW41,000	
Avg daily trading value (60-day)	KRW7.5b/ USD5.0m	

ONE-YEAR PERFORMANCE

	1M	6M	12M
Nextin (%)	-15.2	1.4	13.7
Vs Kosdaq (%pts)	-13.5	-19.4	-26.2

KEY CHANGES

(KRW)	New	Old	Diff
Recommend.	BUY	BUY	
Target price	100,000	100,000	0.0%
2026E EPS	2,153	2,017	6.8%
2027E EPS	3,698	3,677	0.6%

SAMSUNG vs THE STREET

No of estimates	4
Target price	89,000
Recommendation	4.0

※ Rating: 4 < → BUY, 3 = HOLD, 2 > → SELL

SUMMARY 1Q RESULTS

(KRWb)	1Q26	Chg		Diff (%)	
		(% y-y)	(% q-q)	Samsung	Consensus
Sales	7.9	-53.8	-50.4	10.0	-0.3
Operating profit	-5.5	nm	nm	nm	nm
Pre-tax profit	-2.7	nm	nm	nm	nm
Net profit	-2.5	nm	nm	nm	nm
Margins (%)					
Operating profit	-69.6				
Pre-tax profit	-34.2				
Net profit	-31.6				

Source: Company data, Fnguide, Samsung Securities estimates

VALUATION SUMMARY

	2024	2025E	2026E
Valuation (x)			
P/E	13.8	n/a	30.5
P/B	3.3	4.9	3.9
EV/EBITDA	9.9	232.9	21.8
Div yield (%)	1.0	0.7	0.8
EPS growth (% y-y)	21.2	nm	nm
ROE (%)	27.0	-1.6	13.8
Per-share data (KRW)			
EPS	3,708	-235	2,099
BVPS	15,338	14,724	16,538
DPS	500	510	510

All things considered, we forecast Nextin' quarterly sales growth may fluctuate but sales amount will keep expanding. The full-year sales should jump 53% y-y to KRW102.5b, with an operating profit of KRW24.6b (operating margin of 24%).

Maintaining BUY: We maintain BUY rating and KRW100,000 target. Our target price is based on 2027 earnings estimates, which factor in both the resumption of exports to China and the addition of new customers. However, as key assumptions remain largely unchanged, we just finetune our 2027 earnings estimates and keep the target price unchanged at KRW100,000.

Summary income statement

(KRWb)	1Q25	2Q25	3Q25	4Q25	1Q26	2Q26E	3Q26E	4Q26E	2025	2026E	2027E
Sales	**17.1**	**23.2**	**10.7**	**15.9**	**7.9**	**13.6**	**21.0**	**60.0**	**66.9**	**102.5**	**144.9**
Growth (% y-y)	-50.0	64.0	-69.1	-48.1	-53.6	-41.4	95.4	276.9	-41.2	53.2	41.3
Growth (% q-q)	-44.4	35.6	-53.6	48.3	-50.2	71.1	54.7	186.2			
Cost of goods sold	6.4	13.7	5.9	8.5	4.4	7.0	7.3	18.4	34.4	37.2	54.0
Gross profit	**10.7**	**9.5**	**4.9**	**7.5**	**3.5**	**6.5**	**13.6**	**41.6**	**32.6**	**65.3**	**90.9**
Gross margin (%)	62.8	40.9	45.5	46.9	44.5	48.1	65.0	69.3	48.7	63.7	62.7
SG&A expenses	7.3	6.9	8.6	11.0	9.1	8.4	9.8	13.5	33.7	40.7	44.4
Operating profit	**3.4**	**2.6**	**-3.7**	**-3.5**	**-5.5**	**-1.9**	**3.9**	**28.1**	**-1.2**	**24.6**	**46.4**
Operating margin (%)	20.0	11.1	-34.2	-21.8	-69.9	-13.8	18.5	46.9	-1.7	24.0	32.1
Non-operating profit	0.3	-2.8	1.3	-0.7	2.9	0.5	0.6	0.6	-1.8	4.6	3.0
Pre-tax profit	**3.8**	**-0.2**	**-2.4**	**-4.2**	**-2.7**	**-1.3**	**4.5**	**28.8**	**-2.9**	**29.2**	**49.4**
Pre-tax margin (%)	22.0	-0.8	-22.0	-26.1	-33.6	-9.7	21.2	47.9	-4.4	28.5	34.1
Net profit	**2.9**	**-1.0**	**-2.2**	**-2.1**	**-2.1**	**-1.3**	**3.4**	**22.0**	**-2.5**	**22.0**	**37.8**
Net margin (%)	16.8	-4.4	-20.8	-13.1	-26.6	-9.5	16.2	36.6	-3.7	21.5	26.1
EPS (KRW)	**279**	**-99**	**-219**	**-205**	**-206**	**-127**	**333**	**2,153**	**-240**	**2,153**	**3,698**
Growth (% y-y)	-80.7	nm	nm	nm	nm	nm	nm	nm	nm	nm	71.8
Growth (% q-q)	-78.1	nm	nm	nm	nm	nm	nm	546.2			

Source: Company data, Samsung Securities estimates

Sales, by segment

(KRWb)	1Q25	2Q25	3Q25	4Q25	1Q26	2Q26E	3Q26E	4Q26E	2025	2026E	2027E
Product	12.1	19.8	6.1	8.7	2.9	9.2	15.3	51.8	46.6	79.2	117.5
AEGIS	12.1	-0.2	0.0	6.3	2.9	2.9	8.4	38.3	18.2	52.5	72.5
IRIS II	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
KROKY	0.0	20.0	5.9	2.1	0.0	6.3	6.9	9.0	28.0	22.2	36.1
ASPER	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.5	0.0	4.5	9.0
Other	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.0	0.4	0.0	0.0
Service and other	5.0	3.4	4.7	7.2	5.0	4.4	5.7	8.2	20.3	23.3	27.3
Total	17.1	23.2	10.7	15.9	7.9	13.6	21.0	60.0	66.9	102.5	144.9
Growth (% y-y)											
Product	-61.2	80.5	-81.4	-66.3	-76.1	-53.6	152.1	496.3	-53.6	69.8	48.4
Service and other	66.1	6.7	130.7	47.3	0.8	29.6	21.4	13.8	54.7	15.0	17.2
Total	-50.0	64.0	-69.1	-48.1	-53.6	-41.4	95.4	276.9	-41.2	53.2	41.3
Growth (% q-q)											
Product	-53.1	63.7	-69.3	43.0	-66.7	217.7	66.7	238.2			
Service and other	1.7	-32.4	38.2	55.3	-30.5	-13.1	29.5	45.5			
Total	-44.4	35.6	-53.6	48.3	-50.2	71.1	54.7	186.2			

Source: Company data, Samsung Securities estimates

Income statement

Year-end Dec 31 (KRWb)	2023	2024	2025	2026E	2027E
Sales	**88**	**114**	**67**	**103**	**145**
Cost of goods sold	26	34	34	37	54
Gross profit	**62**	**80**	**33**	**65**	**91**
Gross margin (%)	70.9	69.9	48.7	63.7	62.7
SG&A expenses	26	33	34	41	44
Operating profit	**36**	**47**	**-1**	**25**	**46**
Operating margin (%)	41.1	41.3	-1.7	24.0	32.1
Non-operating gains (losses)	**1**	**2**	**-2**	**5**	**3**
Financial profit	3	4	3	6	4
Financial costs	2	1	1	1	1
Equity-method gains (losses)	-0	-0	-0	-0	0
Other	1	-0	-3	-0	-0
Pre-tax profit	**38**	**49**	**-3**	**29**	**49**
Taxes	7	11	-0	7	11
Effective tax rate (%)	17.7	21.5	10.2	24.4	22.0
Profit from continuing operations	31	38	-3	22	39
Profit from discontinued operations	0	0	0	0	0
Net profit	**31**	**38**	**-3**	**22**	**39**
Net margin (%)	35.2	33.8	-4.0	21.6	26.6
Net profit (controlling interests)	31	38	-2	22	38
Net profit (non-controlling interests)	0	0	-0	0	1
EBITDA	39	51	3	32	54
EBITDA margin (%)	44.8	45.2	5.0	31.4	37.5
EPS (parent-based) (KRW)	3,088	3,748	-240	2,153	3,698
EPS (consolidated) (KRW)	3,088	3,748	-240	2,153	3,698
Adjusted EPS (KRW)*	3,088	3,748	-240	2,153	3,698

Balance sheet

Year-end Dec 31 (KRWb)	2023	2024	2025	2026E	2027E
Current assets	**79**	**111**	**96**	**122**	**153**
Cash & equivalents	8	32	15	32	73
Accounts receivable	9	14	6	19	14
Inventories	52	55	60	51	47
Other current assets	10	10	15	20	19
Fixed assets	**64**	**79**	**127**	**146**	**148**
Investment assets	9	10	10	10	10
Tangible assets	25	36	71	89	91
Intangible assets	1	2	4	3	3
Other long-term assets	29	32	42	44	44
Total assets	**143**	**190**	**223**	**268**	**301**
Current liabilities	**14**	**19**	**50**	**56**	**56**
Accounts payable	4	2	6	8	7
Short-term debt	0	0	21	30	30
Other current liabilities	11	17	23	18	18
Long-term liabilities	**1**	**13**	**23**	**43**	**43**
Bonds & long-term debt	0	10	20	39	39
Other long-term liabilities	1	3	3	3	3
Total liabilities	**16**	**32**	**73**	**99**	**98**
Owners of parent equity	**127**	**158**	**150**	**169**	**202**
Capital stock	5	5	5	5	5
Capital surplus	34	34	34	35	35
Retained earnings	93	125	117	134	166
Other	-5	-7	-6	-5	-5
Non-controlling interests' equity	**0**	**0**	**0**	**0**	**1**
Total equity	**127**	**158**	**150**	**169**	**202**
Net debt	-11	-26	33	30	-10

Cash flow statement

Year-end Dec 31 (KRWb)	2023	2024	2025	2026E	2027E
Cash flow from operations	**0**	**43**	**-11**	**27**	**56**
Net profit	31	38	-3	22	39
Non-cash profit and expenses	11	20	16	8	8
Depreciation	3	4	4	7	8
Amortization	0	0	0	0	0
Other	8	16	11	0	0
Changes in A/L from operating activities	-26	-12	-13	-3	10
Cash flow from investments	**-38**	**-19**	**-33**	**-21**	**-10**
Change in tangible assets	-16	-15	-30	-21	-10
Change in financial assets	-1	-0	-1	0	0
Other	-21	-4	-2	0	0
Cash flow from financing	**-4**	**-0**	**27**	**11**	**-5**
Change in debt	0	9	43	17	0
Change in equity	1	1	0	0	0
Dividends	-5	-5	-5	-5	-5
Other	-1	-4	-10	-1	0
Change in cash	-42	24	-17	17	41
Cash at beginning of year	50	8	32	15	32
Cash at end of year	8	32	15	32	73
Gross cash flow	**42**	**59**	**13**	**30**	**46**
Free cash flow	**-16**	**28**	**-41**	**6**	**46**

Financial ratios

Year-end Dec 31	2023	2024	2025	2026E	2027E
Growth (%)					
Sales	-23.5	29.3	-41.2	53.2	41.3
Operating profit	-36.0	29.9	nm	nm	88.8
Net profit	-28.7	24.2	nm	nm	74.3
Adjusted EPS**	-30.3	21.4	nm	nm	71.8
Per-share data (KRW)					
EPS (parent-based)	3,088	3,748	-240	2,153	3,698
EPS (consolidated)	3,088	3,748	-240	2,153	3,698
Adjusted EPS**	3,088	3,748	-240	2,153	3,698
BVPS	12,676	15,388	14,666	16,538	19,726
DPS (common)	500	500	510	510	510
Valuations (x)					
P/E***	22.5	13.6	n/a	29.8	17.3
P/B***	5.5	3.3	4.9	3.9	3.2
EV/EBITDA	17.5	9.8	232.0	21.7	12.1
Ratios (%)					
ROE	27.3	27.0	-1.6	13.8	20.4
ROA	23.4	23.1	-1.3	9.0	13.6
ROIC	50.9	41.8	-0.9	12.3	23.2
Payout ratio	16.5	13.4	-211.3	23.7	13.8
Dividend yield (common)	0.7	1.0	0.7	0.8	0.8
Net debt to equity	-8.6	-16.8	21.8	17.7	-4.9
Interest coverage (x)	3,139.6	1,123.7	-15.3	180.4	340.6

Note: *Excluding one-off items
**Fully diluted, excluding one-off items
***From companies subject to equity-method valuation

Source: Company data, Samsung Securities estimates

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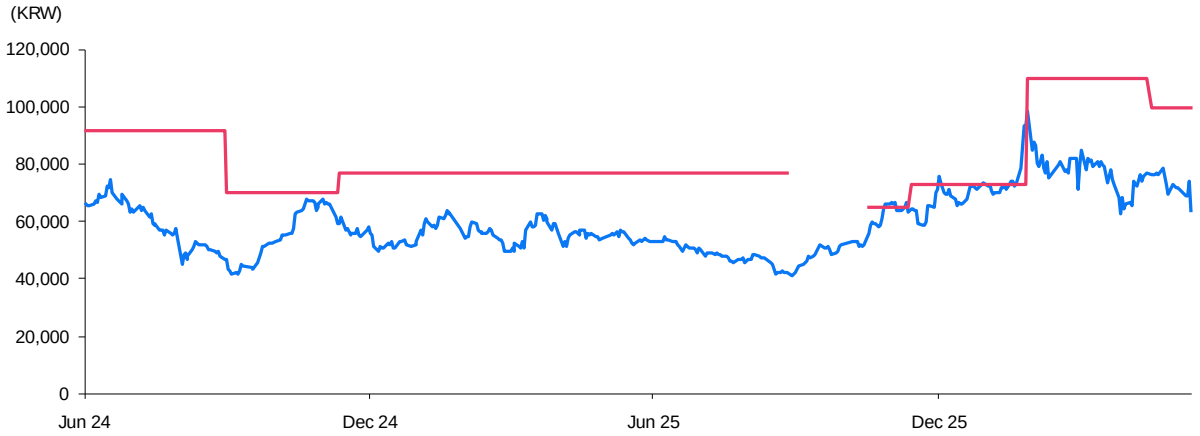
Target price changes in past two years



Rating changes over past two years (adjusted share prices)

Date	2024/3/13	9/3	11/14	2025/10/20	11/17	2026/1/30	4/20
Recommendation	BUY	BUY	BUY	BUY	BUY	BUY	BUY
Target price (KRW)	92000	70000	77000	65000	73000	110000	100000
Gap* (average)	-31.90	-19.80	-30.64	-2.83	-6.90	-29.94	
(max or min)**	-18.91	-3.29	-17.01	3.08	4.11	-20.36	

Note: * [(average, maximum, or minimum share price over duration of target price minus target price) / target price] x 100%
** Maximum/minimum share price if new target is higher/lower than market close on the business day prior to target price change

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Percentage of ratings in 12 months prior to 2026.03.31

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