



# 復盛應用(6670.TW) 2026年第二季營運簡報

2026/08/26

# 會議議程

- 2026年第二季營運表現
- Key Messages
- Q&A

# 免責聲明

本簡報及同時發佈之相關訊息所提及之預測性資訊包括營運展望、財務狀況以及業務預測等內容，乃是建立在本公司從內部與外部來源所取得的資訊基礎。

本公司未來實際所可能發生的營運結果、財務狀況以及業務成果，可能與這些明示或暗示的預測性資訊有所差異。其原因可能來自於各種因素，包括但不限於價格波動、競爭情勢、國際經濟狀況、匯率波動、市場需求以及其他本公司無法掌控之風險等因素。

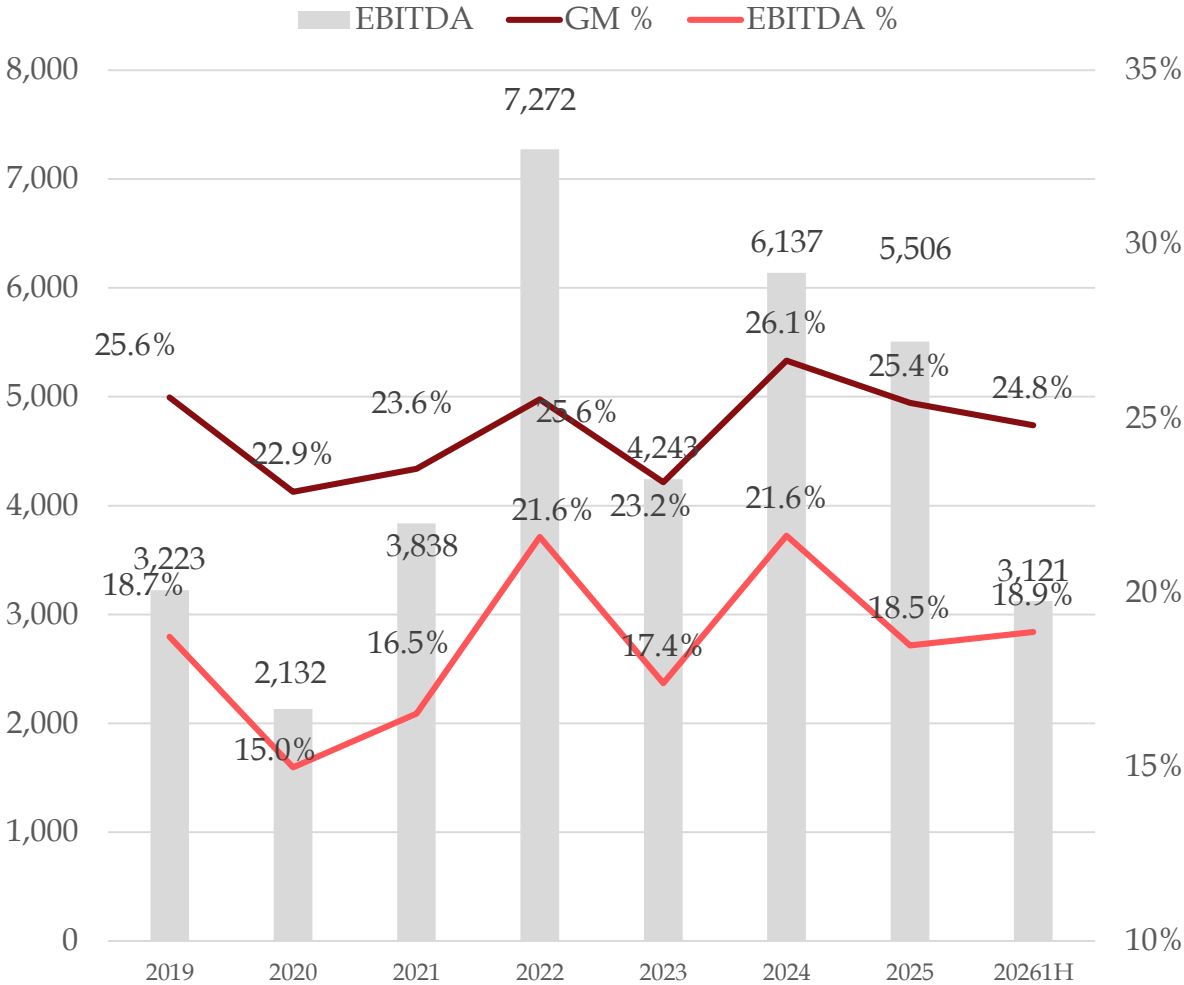
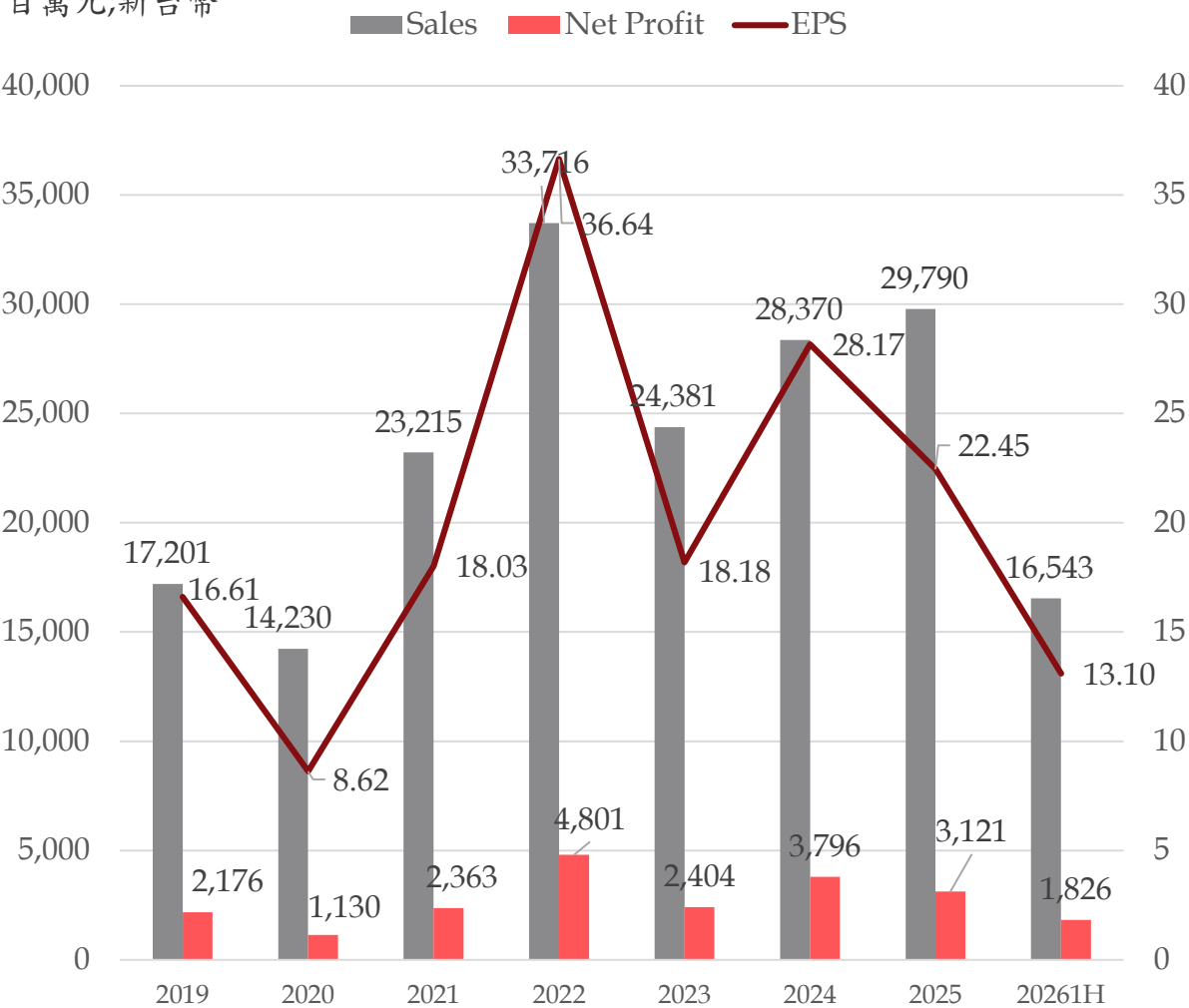
本簡報中對未來的展望，反應本公司截至目前為止對於未來的看法。對於這些看法，未來若有任何變更或調整時，本公司並不負責隨時再度提醒或更新。

綜合損益表

| (In NT\$ millions)                               | 2Q26    | 1Q26    | QoQ    | 1H26     | 1H25     | YoY   |
|--------------------------------------------------|---------|---------|--------|----------|----------|-------|
| Net Revenue                                      | 8,074.3 | 8,468.9 | -4.7%  | 16,543.1 | 15,051.5 | 9.9%  |
| Gross Profit                                     | 2,072.3 | 2,032.7 | 1.9%   | 4,105.0  | 3,794.1  | 8.2%  |
| Operating Profit                                 | 1,257.2 | 1,265.1 | -0.6%  | 2,522.3  | 2,334.1  | 8.1%  |
| Profit before Tax                                | 1,219.1 | 1,332.5 | -8.5%  | 2,551.6  | 2,160.6  | 18.1% |
| Net income to Shareholders of the Parent Company | 856.0   | 970.4   | -11.8% | 1,826.4  | 1,535.7  | 18.9% |
| EPS                                              | 6.1     | 6.96    | -11.8% | 13.1     | 11.07    | 18.3% |
| EBITDA                                           | 1,504.8 | 1,616.5 | -6.9%  | 3,121.4  | 2,659.7  | 17.4% |
|                                                  |         |         |        |          |          |       |
| GM (%)                                           | 25.7%   | 24.0%   | 1.7%   | 24.8%    | 25.2%    | -0.4% |
| OPM (%)                                          | 15.6%   | 14.9%   | 0.6%   | 15.2%    | 15.5%    | -0.3% |
| PBT (%)                                          | 15.1%   | 15.7%   | -0.6%  | 15.4%    | 14.4%    | 1.1%  |
| EBITDA (%)                                       | 18.6%   | 19.1%   | -0.5%  | 18.9%    | 17.7%    | 1.2%  |

營運績效

百萬元;新台幣

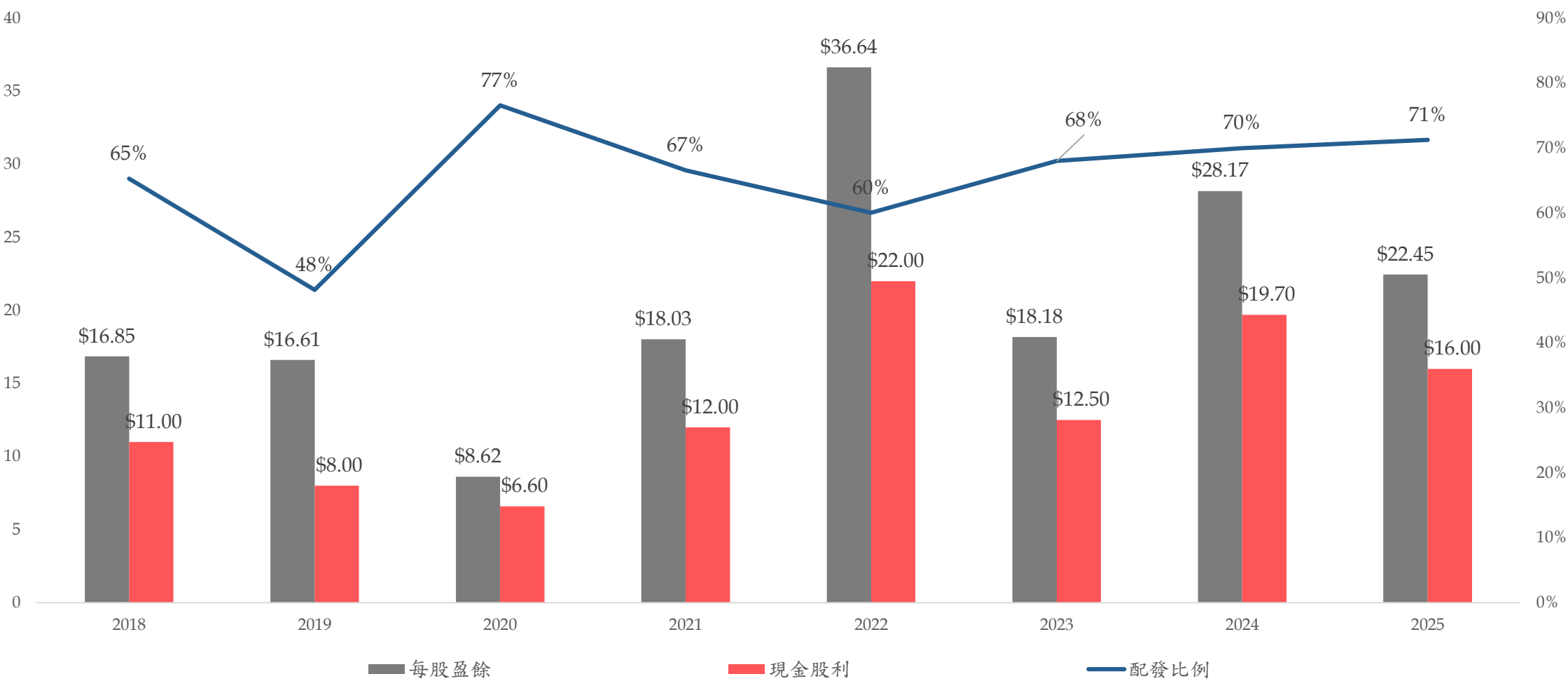


# 資產負債表

| (In NT\$ millions)        | 2Q26          | %             | 4Q25          | %             | 2Q25          | %             |
|---------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Cash                      | 10,089        | 32.3%         | 7,837         | 25.9%         | 8,384         | 31.6%         |
| AR                        | 4,905         | 15.7%         | 5,993         | 19.8%         | 3,999         | 15.1%         |
| Inventory                 | 4,156         | 13.3%         | 4,573         | 15.1%         | 2,981         | 11.2%         |
| <b>Current Assets</b>     | <b>20,592</b> | <b>65.9%</b>  | <b>19,778</b> | <b>65.3%</b>  | <b>16,633</b> | <b>62.7%</b>  |
| PP&E                      | 7,122         | 22.8%         | 7,097         | 23.4%         | 6,884         | 26.0%         |
| Intangible assets         | 1,848         | 5.9%          | 1,736         | 5.7%          | 1,747         | 6.6%          |
| <b>Non-current Assets</b> | <b>10,637</b> | <b>34.1%</b>  | <b>10,509</b> | <b>34.7%</b>  | <b>9,887</b>  | <b>37.3%</b>  |
| <b>Total Assets</b>       | <b>31,229</b> | <b>100.0%</b> | <b>30,287</b> | <b>100.0%</b> | <b>26,520</b> | <b>100.0%</b> |
| Bank Loan                 | 976           | 3.1%          | 1,920         | 6.3%          | 1,228         | 4.6%          |
| AP                        | 2,970         | 9.5%          | 3,550         | 11.7%         | 2,427         | 9.2%          |
| Dividend Payable          | 2,341         | 7.5%          | -             | 0.0%          | 3,201         | 12.1%         |
| Other Payables            | 1,762         | 5.6%          | 2,041         | 6.7%          | 1,525         | 5.8%          |
| <b>Current Lia.</b>       | <b>10,273</b> | <b>32.9%</b>  | <b>9,312</b>  | <b>30.7%</b>  | <b>9,783</b>  | <b>36.9%</b>  |
| Bonds payables            | 1,561         | 5.0%          | 1,543         | 5.1%          | -             | 0.0%          |
| Lease liabilities         | 298           | 1.0%          | 302           | 1.0%          | 312           | 1.2%          |
| Defined benefit lia.      | 84            | 0.3%          | 88            | 0.3%          | 80            | 0.3%          |
| <b>Non-current Lia.</b>   | <b>2,272</b>  | <b>7.3%</b>   | <b>2,274</b>  | <b>7.5%</b>   | <b>905</b>    | <b>3.4%</b>   |
| <b>Total Lia.</b>         | <b>12,545</b> | <b>40.2%</b>  | <b>11,586</b> | <b>38.3%</b>  | <b>10,688</b> | <b>40.3%</b>  |
| Capital                   | 1,394         | 4.5%          | 1,394         | 4.6%          | 1,394         | 5.3%          |
| Other equity              | 17,290        | 55.4%         | 17,307        | 57.1%         | 14,438        | 54.4%         |
| <b>Total Equity</b>       | <b>18,684</b> | <b>59.8%</b>  | <b>18,701</b> | <b>61.7%</b>  | <b>15,832</b> | <b>59.7%</b>  |

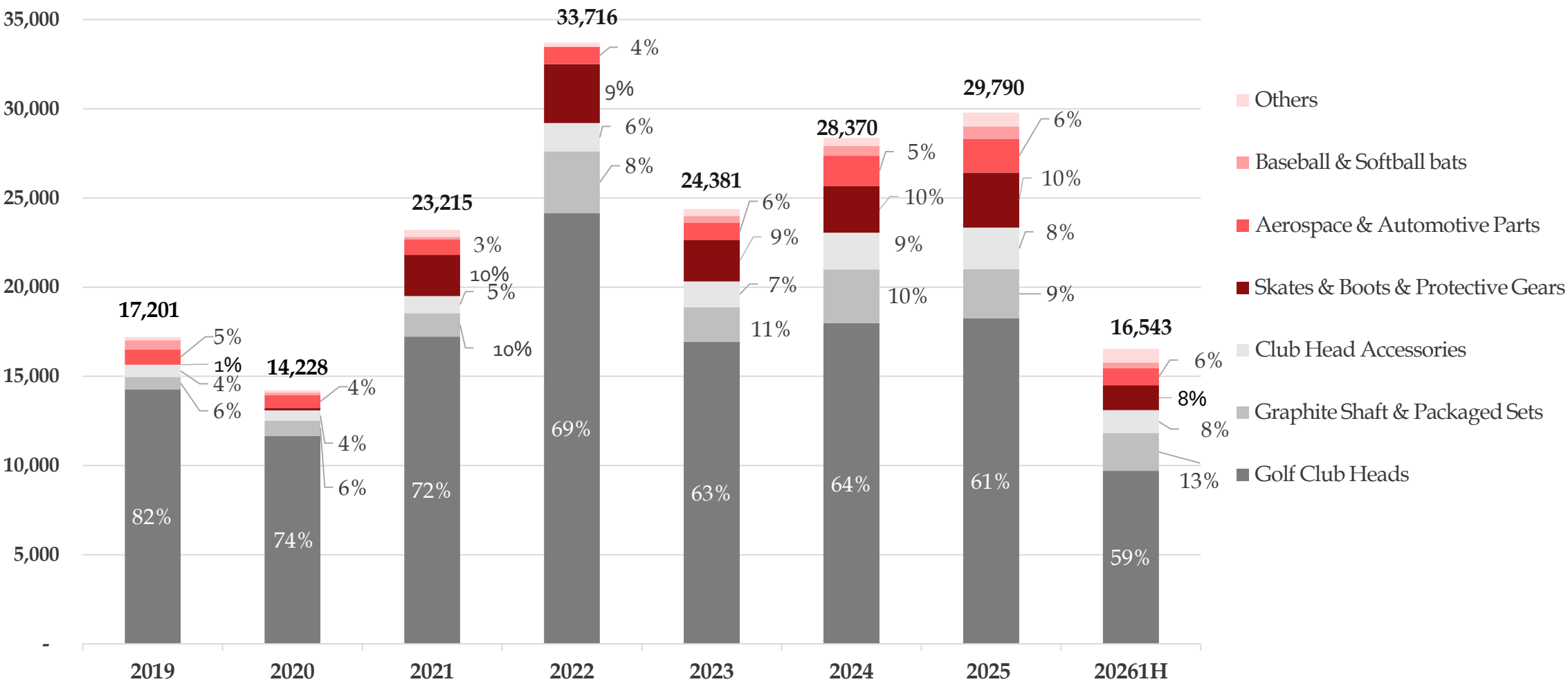
# 每股盈餘 \ 現金股利 \ 配發比例

新台幣



# 產品占比

百萬元;新台幣



## 重點訊息-高爾夫產業狀況

- 美國高爾夫球具零售市場表現 ::

YoY 2Q26 vs 2Q25: Dollars **+3.9%**

2Q26 vs 1Q26 **+72.1%**

2Q26 vs 2Q19 : Dollars **+47.0%**

YTD '26 vs '25: Dollars **+1.4%**

YTD '26 vs '19: Dollars **+45.1%**

- 美國地區主要品牌商球具存貨金額

YoY 2Q26 vs 2Q25 **+3.9%**

2Q26 vs 1Q26 **+12.9%**

2Q26 vs 2Q19 **+47.8%**

- 美國主要品牌商球具存貨金額/ 當季銷貨比值

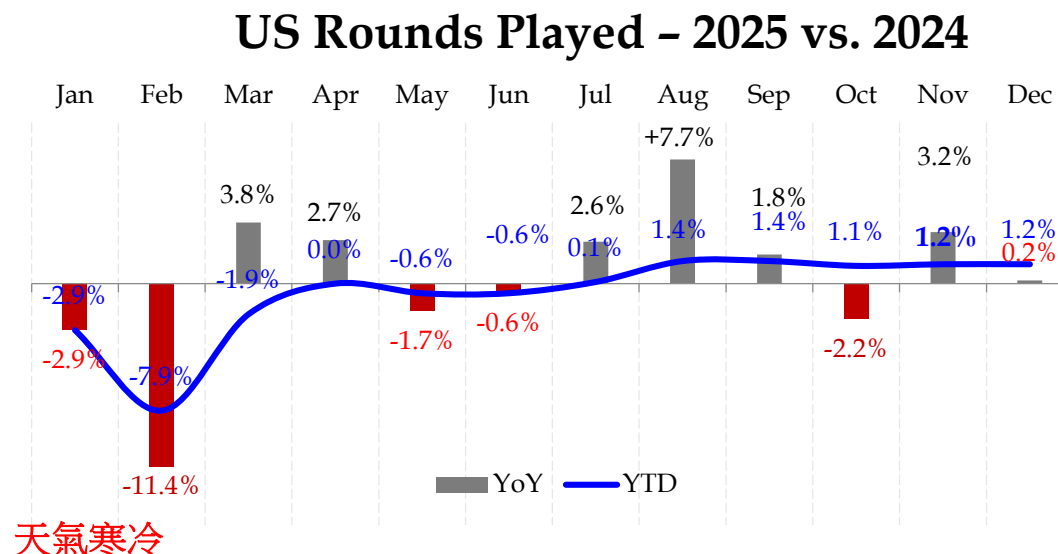
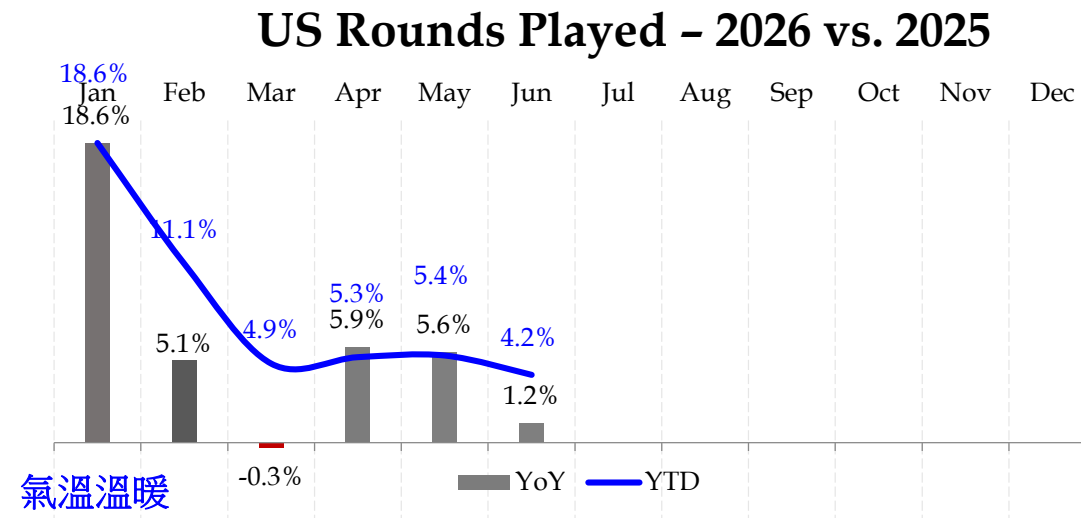
2Q26 **1.24X**

1Q26 **1.89X**

4Q25 **1.71X**

3Q25 **1.35X**

2Q25 **1.26X**



## 近期重點事項摘要

2026/08/12 公告：

- 公告本公司董事會通過115年第二季合併財務報表
- 公告本公司資安長異動

2026/07/08 公告：

- 公告Vision International Co.,Ltd新建廠房案(補充1150507公告)

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