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Asian tech stocks bounce back after Trump tariff exemptions

By Reuters

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A Foxconn electric two-wheeler powertrain system is displayed at Foxconn's annual tech day in Taipei, Taiwan October 8, 2024. REUTERS/Ann Wang/File Photo Purchase Licensing Rights [7]

Companies Summary

- Shares in Apple suppliers such as Foxconn, Goertek and Lens Tech rise
- Trump says he will announce tariff rate on chipmakers next week with some flexibility
- TSMC and SK Hynix shares fall on chipmaker tariff news

TAIPEI/SHANGHAI, April 14 (Reuters) - Shares in Asian tech companies that are major suppliers to companies like Apple rose on Monday after the U.S. government granted temporary exclusions from steep tariffs on smartphones, computers and some other electronics imported largely from China.

Shares in Foxconn (2317.TW) [2], Apple's (AAPL.O) [2] largest iPhone assembler, rose as much as 7.8% before trimming gains to close 3% higher. Contract laptop maker Quanta (2382.TW) 2 closed up 5.8% and Inventec (2356.TW) 2 - which also makes artificial intelligence servers - rose 4.1%.

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The broad index (.TWII) ☐ closed 0.1% lower

China's Goertek (002241.SZ) and Lens Tech (300433.SZ) both rose by more than 7% before also trimming gains. Both firms are Apple suppliers.

Shares in South Korea's Samsung Electronics (005930.KS) \Box , which supplies Apple and is also the second-ranked smartphone vendor in the U.S. market, were up 1.5%.

"We view the dizzying weekend tariff news as a step forward net positive for Apple as well as other tech names as it gives some flexibility and allows for China negotiations to hopefully take place in the coming months," Wedbush Securities analyst Dan Ives said in a note.

Analysts have warned that U.S. prices of iPhones could surge, given Apple's high reliance on imports from China. Apple chartered <u>cargo flights</u> to ferry 600 tons of iPhones, or as many as 1.5 million, to the U.S. from India, Reuters reported last week.

U.S. President <u>Donald Trump</u> said on social media on Sunday the electronics products excluded from his reciprocal tariffs "are just moving to a different Tariff 'bucket," and would be reviewed along with semiconductors in a national security trade investigation into the sector.

Executives in the electronics sector lamented the Trump administration's regular policy shifts.

Renaud Anjoran, a partner of Agilian, a contract manufacturer of electronics in the southern Chinese manufacturing hub of Dongguan, said keeping up with the changes was "exhausting".

"All the customers are basically in panic mode and everybody's busy just following up and reading the news, and contacting and talking to people but no decisions, a lot of things are on hold, that's the situation now," he said.

A Taiwanese electronic company executive said the uncertainty was unsettling and it was unclear if the tariff exemptions announced by the U.S. were real or "just talk".

The executive declined to be named as he was not permitted to speak to media.

Shares of some chipmakers bucked the trend, after <u>Trump</u> said on Air Force One that he would announce a <u>tariff</u> rate on imported semiconductors <u>over the next week</u>, though he added there would be flexibility on some companies in the sector.

Alex Huang, vice president of Mega International Investment Services, said the market on Monday morning was reacting to Trump's exemption announcement, but the reaction may be too early as details are still to come out.

"It's impossible that semiconductors will be exempt from the tariffs, as that would eliminate the need for any bargaining chips in talks with the United States," he added.

TSMC is due to report first-quarter earnings on Thursday.

Reporting by Ben Blanchard and Wen-Yee Lee in Taipei and Brenda Goh in Shanghai; Additional reporting by Emily Chan; Writing by Miyoung Kim; Editing by Jamie Freed

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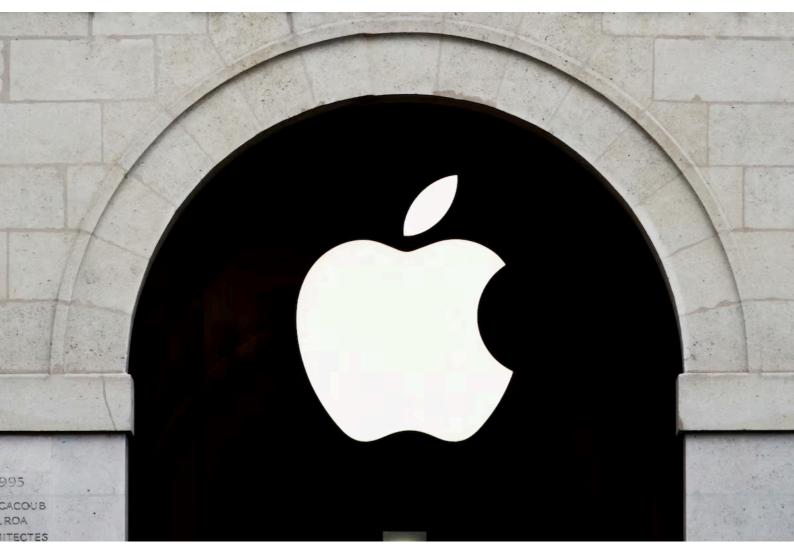
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