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## Sanmina-SCI Corporation F2Q09 (Qtr End 3/28/09) Earnings Call Transcript

### Question-and-Answer Session

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#### Operator

(Operator Instructions). Your first question comes from the line of William Stein with Credit Suisse.

#### William Stein – Credit Suisse

Hi Todd, Jure.

#### Jure Sola

Good. How are you?

#### William Stein – Credit Suisse

Good. Just a couple of quick ones, you had mentioned that in March you saw signs of stabilization and I think you mentioned a book-to-bill of over 1.0. Can you talk about, which end markets are strong on the booking side in March and then also you mentioned you're investing in some new technologies for the future. Can you give us some details there? Thank you.

#### Jure Sola

Yeah. As I mentioned one of the, in any environment especially in the recession that we are experiencing, you always find out that customers are looking, upgrading their existing product and investing in the new technology. And with our new strategy, we are really well positioned with our key customers that we had for many, many years and I think that's one of the reasons that our new bookings was at least in this new projects are looking positive. Our traditional businesses I think are performing little bit better, yes they're down I will say communication infrastructure in which with us that includes networking, wirelines and wireless I think it's holding reasonably well, while medical is holding reasonably well, industrial is holding reasonably well and the defense and aerospace, yeah we have some, few programs that got delayed, but even – but when it comes to the – the some of the little consumer that we are doing and the semiconductor equipment and automotive that was it's really – its really weak. The technologies that we are really investing looking at the areas, as we look at the futures alternative energy, defense and aerospace and industrial and medical side I will say that's the area that we've been lot more focused than our traditional telecommunication infrastructure. Can you hear me?

#### Operator

Your next question comes from the line of Jim Suva with Citigroup.

**Jim Suva – Citigroup**

Great, thanks.

**Jure Sola**

Hello Jim.

**Jim Suva – Citigroup**

Hey great. Can you maybe talk a little bit about on your sales outlook how much of it is acquisitive from the JDSU acquisition, I believe you acquired some assets there and what was the purchase price and run rate of sales?

**Jure Sola**

Well first of all that business, I don't want to give, too much detail strategically that was we went after that we had strong R&D capabilities here in North America and we were looking for expansion in a low cost region. So, when this opportunity came up, it was very exciting especially the assets that we partner with JDSU are one of the leading in our industry. And so the revenue potential and that is a couple of hundred million plus a year, we are bringing new customers to the area. So, we are really trying to make the business out of their long term, they could be a billion dollar business as you look at the three, five years down that line and that's one of the reasons we went after that business, it's a really expansion into some of the latest technology in optical and also start for the future. We believe that optical technology especially if you look at out three to five years is going to be a technology that's going to have a nice growth and may be I'll turn it over to you Hari if you want to add up to and talk a little bit more about our position so.

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