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## Super Micro Computer, Inc. F3Q09 (Qtr End 03/31/09) Earnings Call Transcript

### Question-and-Answer Session

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**Operator**

Thank you. (Operator instructions) And we will first go to Alex Kurtz with Merriman Curhan Ford.

**Alex Kurtz – Merriman Curhan Ford**

Good evening, gentlemen. Can you hear me okay?

**Charles Liang**

Yes.

**Howard Hideshima**

Yes.

**Alex Kurtz – Merriman Curhan Ford**

Okay. So, Howard, just real quick on the housekeeping item. Did you give the unit volume for server components and servers in the quarter?

**Howard Hideshima**

We did not.

**Alex Kurtz – Merriman Curhan Ford**

Could you share that with us? You have it on you?

**Howard Hideshima**

Yes, let me come back to that question.

**Alex Kurtz – Merriman Curhan Ford**

Okay. And then the ASP of the server components would be great too. So, just looking at your guidance, expecting sequential growth into June, could you just go into detail what gives you guys that visibility and that confidence because last couple of quarters have been challenging for you guys. Do you have a real sense that a good chunk of business has been pushed out because of Nehalem and you really expect it to fall in the June quarter?

**Charles Liang**

Yes. Because Nehalem, a big product line, just updated on March 30th, right? So, only true data available to us for last quarter. So, now we have a complete Nehalem product line available with the brand new architecture I just mentioned, 2U Twin2, which has been very attractive to all customers. So, we strongly believe that business in this quarter will surely be better than last quarter.

**Alex Kurtz – Merriman Curhan Ford**

Okay. And Howard, on the OpEx line, are you guys taking any actions there to lower your OpEx going into the June quarter?

**Howard Hideshima**

Yes, I think as we talked about on the call, we have lowered OpEx expense by about \$1 million sequentially and we are not stopping there. We are taking further actions to reduce our costs while continuing to invest in the technology that's setting us apart from the market.

**Alex Kurtz – Merriman Curhan Ford**

So, would that come out of G&A or marketing, like where would you find it?

**Howard Hideshima**

I think you are going to see it all the way across the board.

**Alex Kurtz – Merriman Curhan Ford**

Okay. And guys, what have you seen in the first couple of weeks here or in the first month of April? How has activity been compared to March?

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