

DRAFT LETTER TO COMPANIES

Dear XXX

Investor Letter - Tackling conflict mineral content in the semiconductor supply chain

Tantalum, tin, tungsten, gold and cobalt (hereafter referred to collectively as conflict minerals) are vital materials and building blocks of the semiconductor industry. The poor traceability of these minerals along complex supply chains, including smelting and refining, can obscure the provenance of these minerals. This can lead to the inadvertent financing of armed conflict and the abuse of human rights.

We are a group of long-term investors who believe that good sound labour practices and good environmental management go hand in glove with shareholder returns. As regulators and consumers pay increasing attention to the challenges of mineral sourcing within the semiconductor supply chain, there is an opportunity for companies to take a lead in the development of conflict mineral free supply chains.

We are writing to encourage your Company to take a leadership position in the development of best practice around the sourcing of minerals in the semiconductor supply chain, through the following actions:

- Develop and invest in technological solutions to improve traceability, possibly block chain.
- Increase transparency and reporting on minerals from mine to product.
- Encourage and participate in industry wide collaboration to improve industry practices.
- Impose and enforce harsher sanctions on non-compliance.
- Reduce demand for new materials by improving recycling initiatives.

This letter is represented by the following XXX investors whom have collectively XXX assets under management.

XXX – investors to be listed

We look forward to your response and would be delighted to discuss the matter in more detail with you. Please contact jennifer.stephen@stewartinvestors.com and/or chris.mcgoldrick@stewartinvestors.com

Yours sincerely,

XXX on behalf of the signatory investors