

Investment Thesis Snapshot

Verdancia's investment thesis arises from the integration of **deep technology understanding, precision-manufacturing insight, and institutional investment discipline.**

Core Thesis Invest in growth-stage companies positioned within, or emerging into, Taiwan's high-tech supply chain — companies with defensible know-how, strong founder leadership, and clear qualification and scaling pathways.

Why This Works

- Taiwan's ecosystem is structurally indispensable
- AI and compute demand are accelerating
- Supply-chain expansion requires capital, governance, and scaling support
- Growth-stage companies are undercapitalized due to limited offshore institutional participation

Verdancia's Advantage

- Senior semiconductor leadership (TSMC + Winbond)
- Proprietary founder access
- Deep-tech diligence capability
- Institutional structuring discipline
- Taiwan-specific regulatory and operational expertise

Outcome A portfolio of 8–12 companies capable of achieving durable supply-chain integration and delivering strong mid- to long-term returns.