Verdancia Capital - Firm Overview

Verdancia Capital Ltd. - Investing in Taiwan's Technology Supply Chain Infrastructure

Verdancia Capital is a technology-focused investment manager dedicated to the industrial backbone that powers global innovation. Operating at the Taiwan end of the Taiwan–U.S. technology corridor, Verdancia invests in growth-stage companies positioned to become durable contributors to Taiwan's high-tech manufacturing ecosystem — the world's most critical and irreplaceable technology supply chain.

Taiwan's role in the AI era is foundational. As the manufacturing and technological core behind advanced semiconductors, specialty memory, precision components, and compute infrastructure, Taiwan controls a set of structural "choke points" that define the trajectory of global technology. Verdancia was established to give institutional investors access to this ecosystem at the moment when demand for physical manufacturing capacity far exceeds global supply.

Verdancia Capital intends to *serve as a strategic entry point for institutional investors representing countries seeking deeper participation in high-tech, precision manufacturing—the physical layer of technology that is increasingly central to global economic and geopolitical competition*. By operating directly within Taiwan's advanced manufacturing and semiconductor ecosystem, Verdancia provides these investors with disciplined access, technical clarity, and a structured pathway into the industrial capabilities that underpin the AI era and the broader technological landscape.

Our Mission

To identify, support, and scale the specialist companies that will define the next phase of Taiwan's technology ecosystem — companies with defensible know-how, strong founder leadership, and the potential to integrate deeply into the supply chain.

Our Structural Insight

Verdancia was founded to address a long-standing gap in Taiwan's private-equity landscape. Despite Taiwan's centrality to global technology, offshore institutional capital remains largely absent from local growth-stage and pre-IPO technology companies. This absence has led to valuation compression, under-capitalization, and missed cross-border opportunities.

Verdancia's approach integrates:

- **Deep technology understanding** from senior semiconductor leaders
- **Institutional structuring discipline** from Western investment banking
- **Long-standing founder relationships** across Taiwan's high-tech ecosystem

This combination enables Verdancia to source high-quality companies, evaluate complex technologies, and elevate opportunities to institutional standards.

Our Technical Leadership

Verdancia's platform is strengthened by senior advisors who have shaped Taiwan's semiconductor and precision-manufacturing industries.

From the document:

"A defining feature of Verdancia is its Participating Advisors, amongst them is former Chief Technology Officer at TSMC, who is our General Partner of Technology."

Dr. **Konrad Young**, former **Chief Technology Officer at TSMC**, provides Verdancia with unmatched visibility into frontier technologies and advanced-node manufacturing. His leadership at the world's most advanced semiconductor manufacturer materially elevates Verdancia's sourcing and diligence capabilities.

Dr. **Pai Pei-Lin**, former **Chief Technology Officer at Winbond**, adds deep expertise in DRAM, NOR, SLC NAND, and emerging memory technologies. His decades of experience across memory design, production, and commercialization strengthen Verdancia's ability to evaluate specialist companies with technical and commercial rigor.

Together, they give Verdancia a **full-stack semiconductor vantage point** across logic, memory, packaging, and system integration.

Our Investment Platform

Verdancia will build a verified track record through **2–3 SPVs** between Q3 2026 and Q1 2027, each anchored by proprietary founder access and deep-tech diligence. These

SPVs allow investors to engage with Verdancia early, observe execution capability, and participate in high-conviction opportunities.

In January 2027, Verdancia will launch its first institutional vehicle — the **Taiwan Stratum Technology Fund**, targeting:

- **USD 300 million** core fund
- **USD 100–120 million** SPV program
- **10–12 portfolio companies**
- **3–4× net MOIC**
- **25–30% net IRR**

Our Edge

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

Verdancia Capital is positioned to operate at the heart of one of the most consequential technology build-outs of our time.