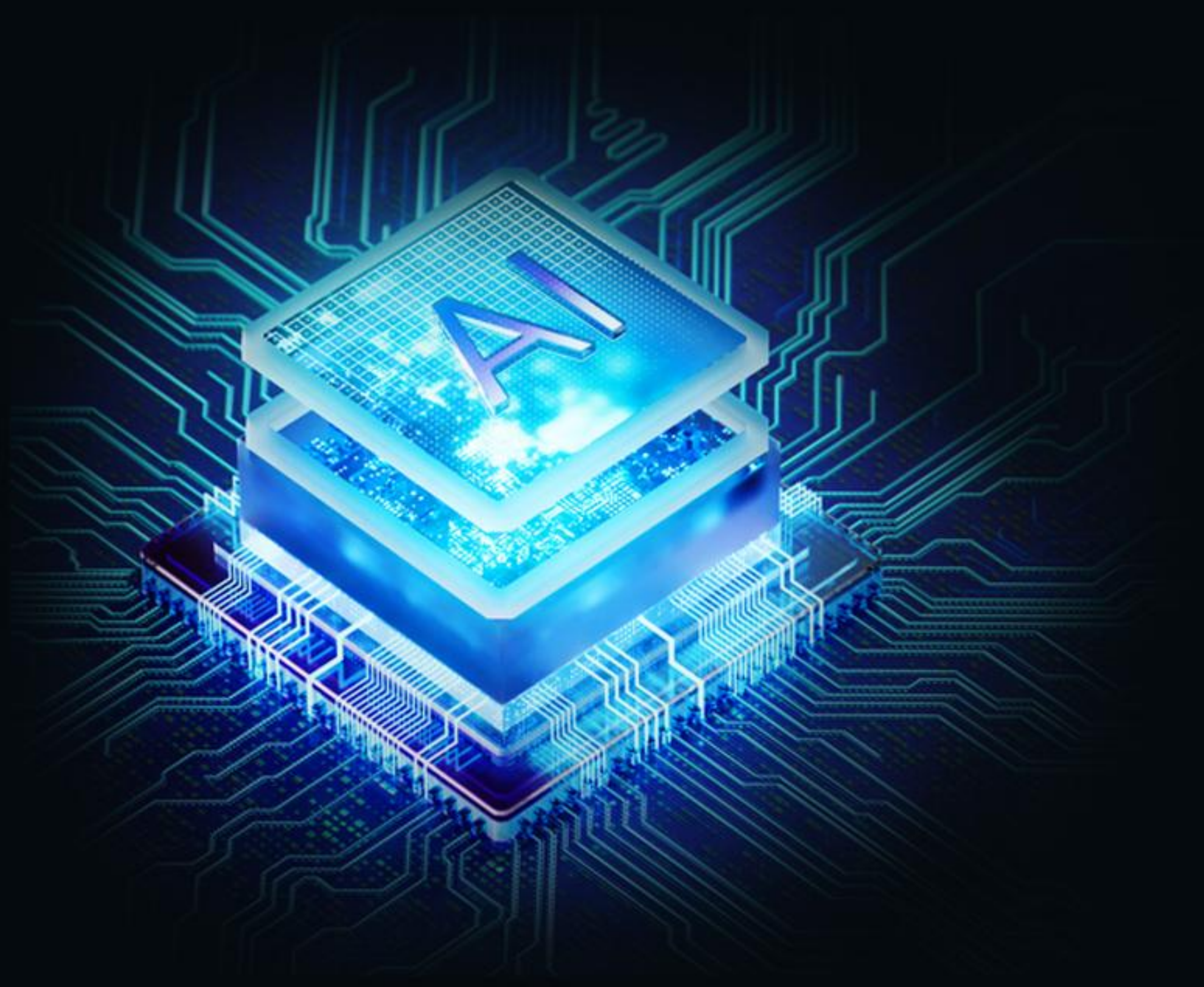
Q2-2026 Results Earnings Call



August 10, 2026

Introducing

Moshe Eisenberg
Chief Financial Officer

Rafi Amit
Chief Executive Officer

Ramy Langer
Chief Operating Officer

Safe Harbor Statement

Certain statements made on this call, constitute "forward-looking statements" within the meaning of the Securities Act of 1933, as amended and the Securities Exchange Act of 1934, as amended, and the safe-harbor provisions of the Private Securities Litigation Reform Act of 1995.

Such statements may use terminology, such as believes, expects, may, will, should, anticipates, plans or similar expressions to identify forward-looking statements. Such statements reflect only current beliefs, expectations, and assumptions of Camtek, however actual results, performance, or achievements of Camtek may differ materially, as they are subject to certain risks and uncertainties. Such risks and uncertainties include, but are not limited to, those that are described in Camtek's most recent Annual Report on Form 20-F and as may be supplemented from time to time in Camtek's other filings with the SEC, including today's earlier filing of the earnings PR, all of which are expressly incorporated herein by reference. Camtek undertakes no obligation to update any such forward-looking statements unless required by law.

Camtek's public filings are available on the Securities and Exchange Commission's website at www.sec.gov, and may also be obtained from Camtek's website at www.camtek.com.

Also, today's call will include certain non-GAAP numbers. For a reconciliation between GAAP and non-GAAP results, please see the table attached to the press release that was issued earlier today which is posted on the Investor Relations section of Camtek's website.

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Business Highlights

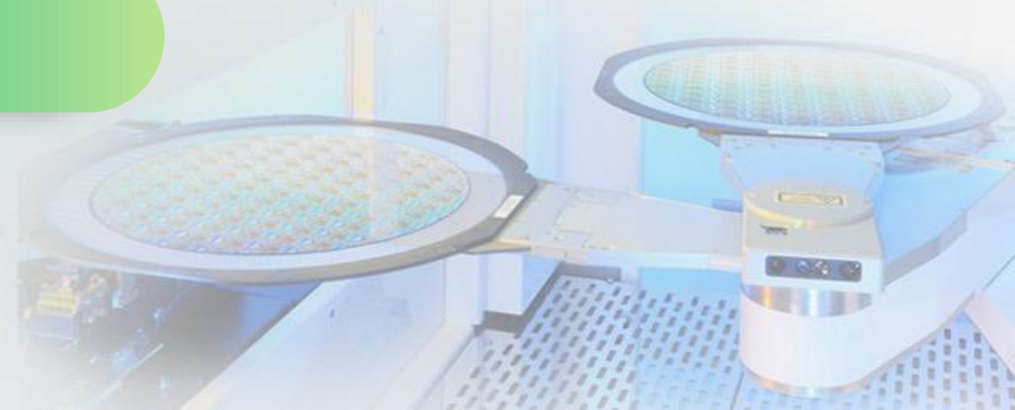
Q2-26 Highlights

Revenue
$133.2M

Operating Income
$36M

Gross Margin
51.4%

Expects strong second half



Q2 2026 Business Highlights

~75% of revenues were for **Advanced Packaging ap**plications – mostly for AI products

- 45% growth in AP sales is expected in H2 2026 compared with H1
- Q4 AP revenues expected to be 70 higher than Q1

Remaining 25%:

- General 2D applications
- Photonics

50% of the revenues came from our new products the Eagle G5 and Hawk

More than $600M in orders received since the beginning of the year

Exceptional Growth: $600M Since the Beginning of the Year

- **80% of these orders** are for **Advanced Packaging** Applications
- **The transition to HBM4** and the associated capacity expansion have driven large orders from multiple HBM customers
- **Rapid 2.5D/3DIC capacity expansion** is driving significant demand for Camtek, already resulting in large multi-system orders from leading foundries, IDMs and OSATs.
  - OSATs accounted for more than 50% of our total order intake
- **Emerging photonics markets,** including silicon photonics and compound semiconductors, are creating a meaningful opportunity for Camtek, with multiple-system orders already received from several customers

Outlook

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- **Revenue guidance for Q3 is between $158M to 160M**
  - An exceptional 20% growth quarter over quarter
- **More than 30% growth in H2-26 vs. H1-26**
  - Strong order momentum and backlog level
- **Continued growth into 2027**

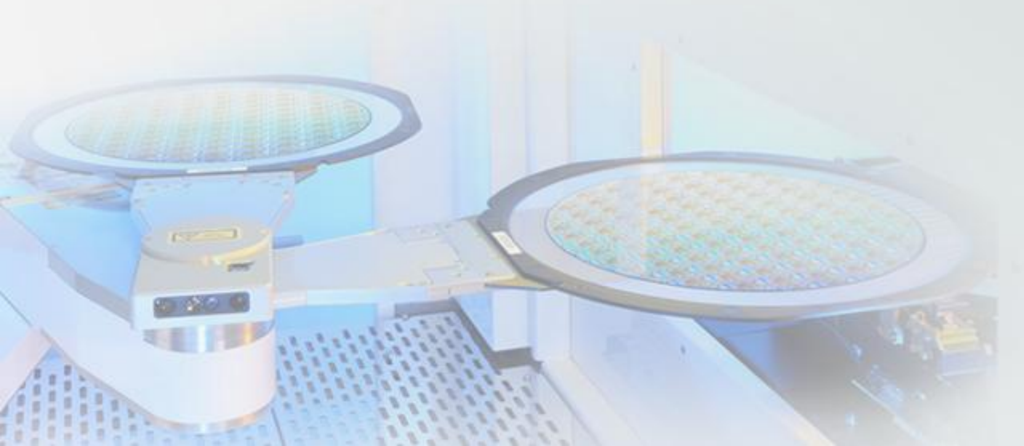
Strong outlook for both 2026 and into 2027

New Products & Capabilities Expand TAM

- **New platform configurations and application-specific modules address new markets, e.g.:**
  - High resolution backside inspection
  - Fluorescence illumination
- **New metrology platform: NanoProf**
- **The Hawk coupled with our breakthrough AI technology penetrate additional process steps, including Hybrid Bonding**
- **Operations are scaled to support continued growth**
  - Supply chain and manufacturing have been proactively expanded to meet customer demand, with further scaling underway
  - Preparing the organization for the next stage of growth (integration, sales, customer support)

Summary

- AI adoption is driving sustained investment in data center and advanced semiconductor manufacturing
- Camtek is strongly positioned with an established footprint at leading semiconductor manufacturers
- Deep customer collaboration aligns our inspection and metrology roadmap with next-generation technology needs
- Strong customer engagement, product portfolio expansion and proven execution support long-term sustainable growth



Financial Highlights

Quarterly Performance (NON-GAAP)

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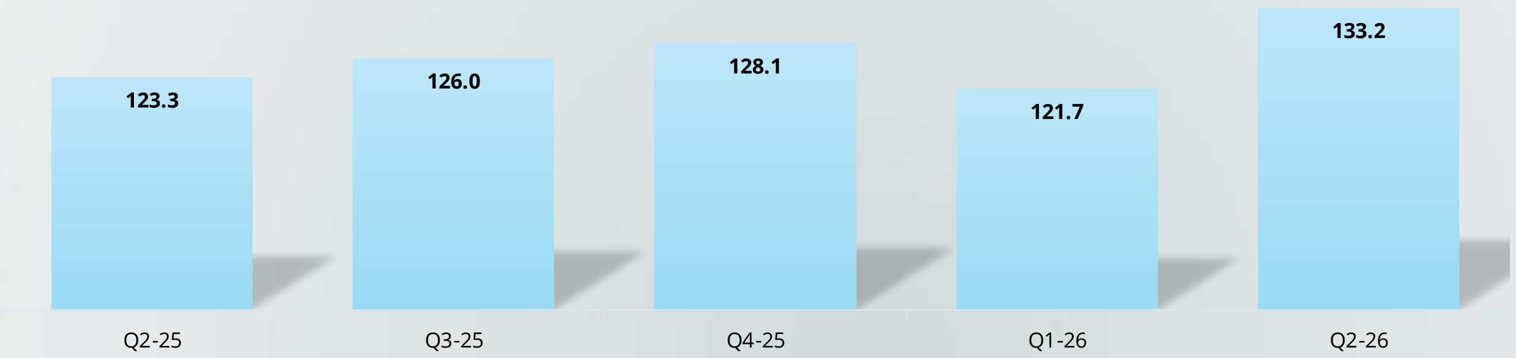
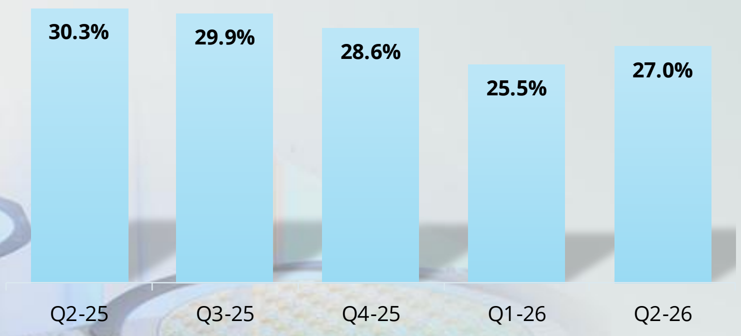
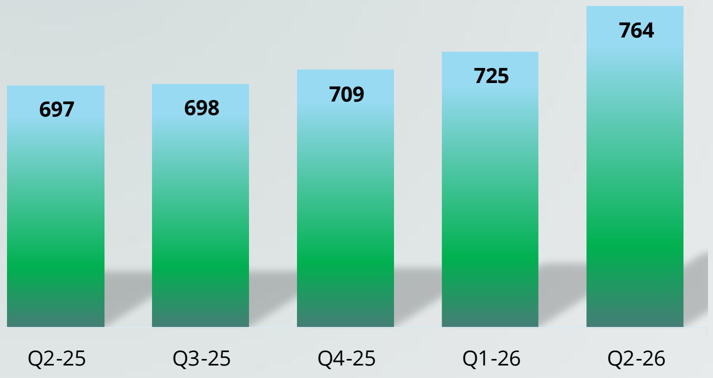
Revenue ($M)



Operating Margin



Headcount



Selected Balance Sheet Data

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($ in millions)	**6/30/26 (Unaudited)**	**12/31/25 (Audited)**
Cash & Deposits [(1)]	$816	$851
Trade Account Receivables, net	154	91
Inventory	117	128
Fixed Assets	69	65
Intangible Assets + Goodwill	129	84
Current Liabilities	125	107
Convertible Notes, Net	488	520
Total Balance Sheet	1,339	1,260

(1) Includes cash and cash equivalents, short-term and long-term deposits and marketable securities


SAVE THE DATE
Camtek
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OCTOBER 14, 2026
7:00 – 8:45 AM
INVESTOR BREAKFAST
PRESENTATION
2026
AT SEMICON WEST
GRAND HYATT SAN FRANCISCO
UNION SQUARE SAN FRANCISCO, CA

Q&A

Moshe Eisenberg
Chief Financial Officer

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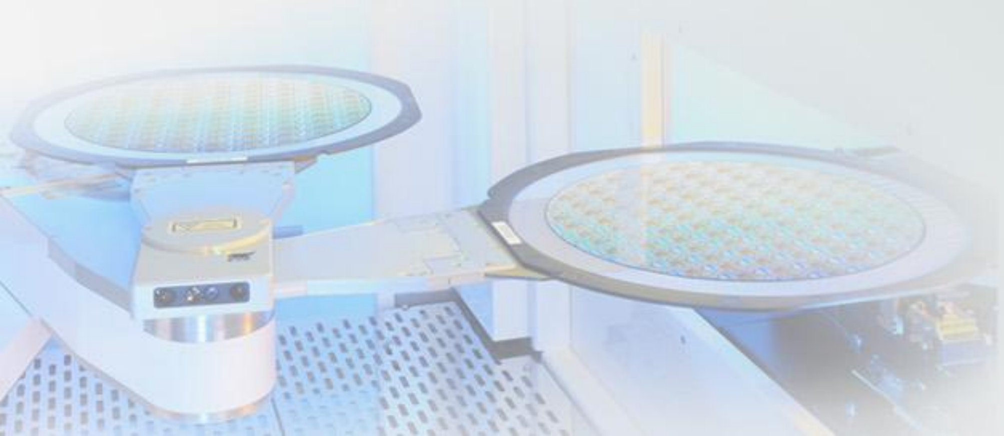
Chief Operating Officer



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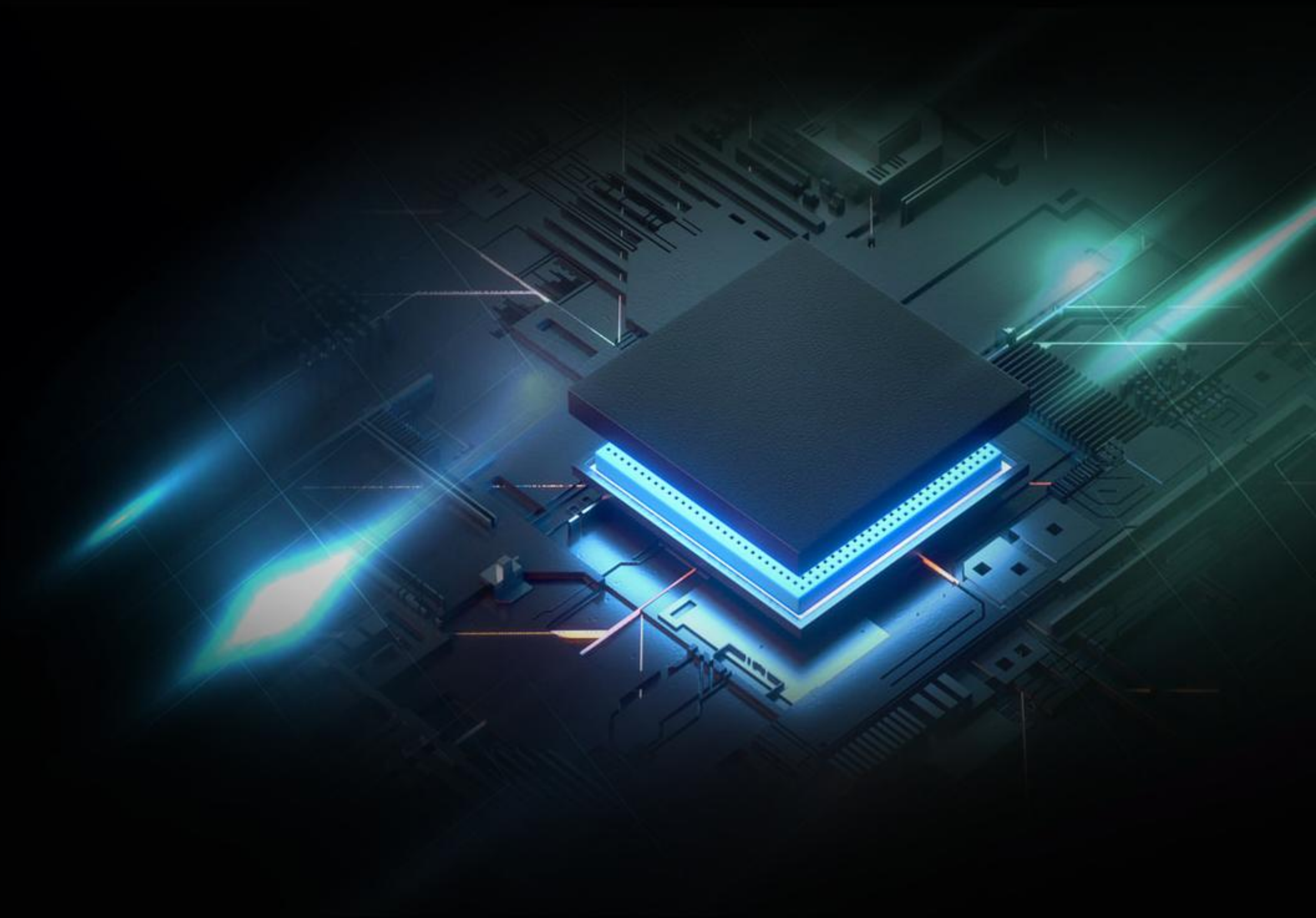
Thank You



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