MERIDIAN TECHNOLOGIES PORTFOLIO · WEEKLY MILESTONE TRENDS

Portfolio Trends: Where to deep-dive

Milestones losing ground in a sustained pattern — the trend, what the team says is causing it, and who leadership needs in the room

Data as of refresh: Oct 2, 2026

Focus rule: slipped in 2+ of the last 4 refreshes AND lost 14d or more over them
Grouped by program, worst-affected program first

4
milestones in a sustained slip pattern

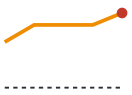
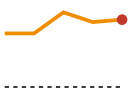
+67 d
largest 4-wk net slip (Altair 1)

14
overdue actions across the shortlist

1
with no owner named in the workbook

SUSTAINED SLIP PATTERN — ROOT CAUSE AND WHO TO CONVENE

One bad refresh is an event; two in four is a trend. Only the trend rewards a deep dive — single large moves and smaller drifts are listed underneath, not dropped.

Program · standardized milestone	Gap · 4-week pattern	Root cause (verbatim, this refresh)	Deep-dive review: who to convene · what to establish
 ALTAIR 1 **Altair POR1,4 Module Qualified** RED Target Mar 15, 2027	**146 d late** slipped 2 of last 4 refreshes +67 d over 4 wks	*"Slip due to alignment that Fab A is working on functional wafers now and will start qual wafers in early November."*	In the room: Marcus · Marcus/Elena · Yuki **Ask: 3 actions overdue (oldest Jul 31)**
 **POR1: MP release (OSAT A + OSAT B)** RED Target Mar 31, 2027	**144 d late** slipped 2 of last 4 refreshes +56 d over 4 wks	*"Slip due to alignment that Fab A is working on functional wafers now and will start qual wafers in early November. Sep 25 - No change. Qual is the gating item."*	In the room: Marcus/Elena · Elena · Marcus **Ask: 2 actions overdue (oldest Aug 15)**
 **Altair Oct 232K samples** RED Target Oct 14, 2026	**98 d late** slipped 3 of last 4 refreshes +42 d over 4 wks	*"Slip due to delay in starting all embedded substrates at OSAT A."*	In the room: Elena · Owen · Dev **Ask: 9 actions overdue (oldest Jun 22)**
 VEGA **Vega MP released** RED Target Jun 30, 2027	**83 d late** slipped 2 of last 4 refreshes +17 d over 4 wks	*"Slip due to Altair simulation and DOE"*	NO OWNER NAMED in this milestone's action log **Ask: no cause for the 26d move (Sep 16)**

OUTSIDE THE PATTERN — EVENTS, DRIFT AND RECOVERIES

One large move, no pattern (watch for a second): Procyon Next Sample WS +17 d
Slipping but under a band over four weeks: none
Held, no net movement over four weeks: Procyon POR 4 Qual complete · Procyon POR 4 Production Release
Moving the right way: Lyra POR1 Production Release ·112 d · Lyra POR 1 B0 Qual Complete ·101 d · Vega POR4 Qual Complete (Pattern/OSAT A) ·20 d · Lyra Next Sample WS ·20 d
Completed: Vega Next samples (100 piece alpha samples)

Root causes quoted verbatim from the workbook Dashboard sheet. Owners and overdue actions read from each milestone's own action log. Pattern and net slip computed from the weekly forecast series.

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