

HALF-YEAR FINANCIAL REPORT 2009

MONTANA
TECH COMPONENTS

MONTANA

TECH COMPONENTS



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AEROSPACE & INDUSTRIAL
COMPONENTS

Development and manufacture of high quality aluminium profiles for the aerospace industry and other industries



MONTANA

METAL TECH

Special machinery for product identification in the metallurgical sector



MONTANA

VARTA MICRO POWER

Niche player in the market for button cell batteries and rechargeable and non-rechargeable batteries for OEMs



Dear Shareholders,
Dear Ladies and Gentlemen,

The 1st half-year of 2009 was marked by the dramatic global recession. Also in the 2nd quarter 2009, the business development of the subsidiaries of Montana Tech Components AG was impacted by these general conditions. Fortunately, Montana Tech Components Group (MTC Group) continued to achieve clearly positive operative results.

Within the first six months of 2009, the gross domestic products of many industrialised countries substantially declined. The negative environment on the sales markets led to a significant reduction of production capacities worldwide. According to our appraisal it is too early to deduce a sustainable economic recovery from these indications, although there have been first signs of a trend reversal recently. Despite all cost saving efforts, profitability of many industrial groups has reached the lowest level for some years. The unchanged restrictive credit policy of the banks represented an unpleasant and continuing side effect in the last quarters. In this economic environment, Montana Tech Components AG managed – despite declining sales – to limit the reduction of the operating result to approximately 20% and to achieve an EBIT margin of 6%.

In spring 2009 Montana Tech Components AG successfully completed an ordinary capital increase with the total volume of 14.0 million Euro which – from a current point of view – will ensure the medium term minimum financing of the Group up to June 2011. Whereas 10.0 million Euro have been paid in cash immediately, a direct payment obligation of the majority shareholder exists for the remaining 4.0 million Euro. The capital increase was registered on May 27, 2009.

As a result of the worldwide economic slump and the weakness in demand that goes hand in hand with it, net sales of the Group declined by 11% compared to the same period of the previous year. Besides the drastic sales reduction of industrial components, the division Aerospace & Industrial Components had to face a flattening of aerospace sales. Due to the ongoing weak demand in several segments (automotive, server), the half-year turnover of the division Varta Micro Power is about 15% lower compared to the same period of the previous year. The division Metal Tech could register an increase in sales of 17% compared to the 1st half-year 2008 because of the available high order backlog.

The completion of the new plant in Romania (UAC Europe S.R.L.) still proceeds as scheduled. The certification process with Airbus is already under way and the first deliveries are scheduled for the beginning of 2010.

At the beginning of 2009, MTC Group has reacted to the bad economic conditions by focussed working capital management and consequent cost saving measures throughout all areas.

Due to the ongoing weak market for industrial components – the demand declined by more than 40% compared to the previous year – further flexibility measures for personnel in Switzerland have become inevitable. As short-time work could not sustainably secure the competitiveness and the liquidity of the company, Alu Menziken Extrusion AG is forced to reduce personnel.

The outlook for the global economic development in the next months of 2009 is still quite uncertain. From a macroeconomic point of view, the bottom seems to be passed through, but many experts anticipate only a stabilisation of the economic performance on a low level.

Therefore, from an operational point of view, Montana Tech Components AG expects the challenging situation to continue for the 2nd half-year of 2009. Besides consequent working capital management and cost optimisation, safeguarding liquidity is the top priority.

Within the next months, strategic chances in line with the mid/long term focus of the Group shall be evaluated.

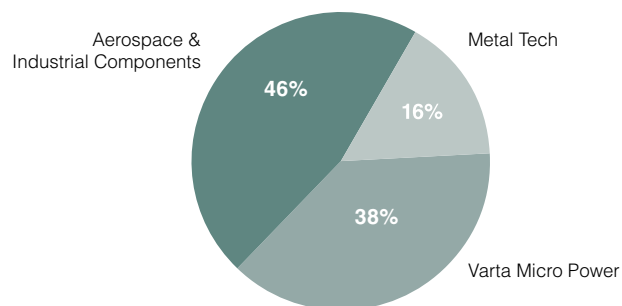
Key financials of MTC Group

(in T€) unaudited according to IFRS	MTC Group		Aerospace & Industrial Components		Metal Tech		Varta Micro Power	
	1-6/2008	1-6/2009	1-6/2008	1-6/2009	1-6/2008	1-6/2009	1-6/2008	1-6/2009
Net sales	179,531	159,862	86,689	73,548	21,357	25,066	71,485	61,248
EBITDA ¹⁾	19,799	17,747	12,115	8,449	2,242	2,519	6,905	7,245
% of net sales	11.0%	11.1%	14.0%	11.5%	10.5%	10.0%	9.7%	11.8%
EBIT ¹⁾	12,676	9,945	9,123	4,252	1,720	2,053	3,324	4,144
% of net sales	7.1%	6.2%	10.5%	5.8%	8.1%	8.2%	4.6%	6.8%
EBT	2,633	4,428	6,114	2,762	803	1,329	557	3,118
Net income for the period	223	562	3,430	-193	340	1,009	1,319	2,613
Employees	2,906	2,590	1,117	959	213	220	1,565	1,399

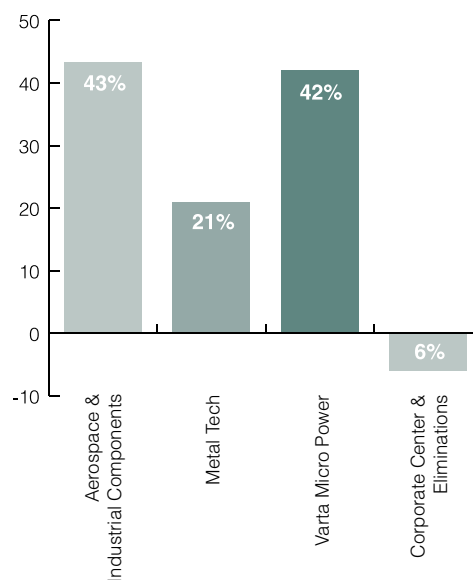
(in T€) unaudited according to IFRS	MTC Group					
	Q1 2008	Q2 2008	Q3 2008	Q4 2008	Q1 2009	Q2 2009
Net sales	87,794	91,737	86,349	84,997	85,131	74,731
EBITDA ¹⁾	10,120	9,679	9,873	-262	9,856	7,891
EBIT ¹⁾	6,610	6,066	6,226	-9,466	5,931	4,014
EBT	805	1,828	3,082	-12,522	4,821	-393
Net income for the period	-953	1,176	1,636	-13,191	2,594	-2,032
Employees	2,781	2,906	2,919	2,814	2,687	2,590

1) EBITDA and EBIT before private equity fund management fees in 2008

NET SALES PER DIVISION 1-6/2009



EBIT PER DIVISION 1-6/2009



Financial review

INTRODUCTION

Beginning with the 2nd quarter 2009, the quarterly report of the MTC Group contains for the first time an overview of key figures and a cash flow section. These enlargements of the report provide a quick overview on the development of the Group in the last 6 quarters and give information on the development of the cash flow.

There have been no changes in the scope of consolidation in this reporting period.

INCOME STATEMENT

General Information

MTC Group's consolidated balance sheet and consolidated income statement for the 1st half-year 2009 (both prepared according to IFRS and not audited) are listed on pages 10 and 11 of this report.

Consolidated net sales of the MTC Group in the 1st half-year of 2009 amounted to T€ 159,862 (1st half-year 2008: T€ 179,531). This represents a decrease of 11% compared to the previous year which resulted mainly from the lower sales of industrial components as well as from reduction in demand for aerospace products and a decline of sales in the division Varta Micro Power.

Since invoicing is primarily done in local currency, the development of the U.S. Dollar and the Swiss Franc has no significant effect on the operating business of the companies. The development of the U.S. Dollar and the Swiss Franc, however, leads to positive or negative impacts when the translation from the functional currency to the reporting currency (Euro) is performed.

Due to a significant reduction of finished and unfinished goods the sum of changes in finished and unfinished goods and other operating income is negative. Other operating income mainly results from the division Varta Micro Power and includes a special positive effect in form of an unexpected cash-in from an insolvency case.

Cost of materials, supplies and services decreased from T€ 82,314 for the 1st half-year of 2008 to T€ 60,631 because of reduced production volumes and lower prices for raw materials.

The slight decline in personnel expenses (T€ 1,030) compared to the previous year is attributable to the first effects of various human resource measures.

The Group managed to reduce other operating expenses by T€ 1,476 to T€ 27,018 for the 1st half-year 2009.

FINANCIAL REVIEW

A separate presentation of EBITDA and EBIT before and after deduction of Private Equity Fund Management Fees (PEFMF) can be omitted from the 1st quarter 2009 onwards, since the PEFMF were particular expenses in the income statements of 2007 and 2008 respectively. For comparison purposes, EBITDA and EBIT before deduction of PEFMF of the comparable period 2008 are taken into account.

EBITDA for the 1st half-year 2009 was T€ 17,747 (1st half-year 2008: T€ 19,799), representing an EBITDA margin of 11.1%. Compared with the 1st half-year 2008, the EBITDA margin was stable.

EBIT in the amount of T€ 9,945 (1st half-year 2008: T€ 12,676) corresponds to an EBIT margin of 6.2% (1st half-year 2008: 7.1%).

Due to the financing structure of the MTC Group, the balance of interest income and interest expense remains clearly negative. Net interest expenses increased by T€ 487 and amount to T€ 4,890. Other financial income and other financial expenses include foreign currency exchange gains of T€ 3,064 (2008: T€ 1,913) and foreign currency exchange losses of T€ 3,693 (2008: T€ 3,528).

The tax rate of the MTC Group has improved in the 1st half-year 2009 and is now 87% (2008: 92%) which still is an unsatisfying level. Different results of the Group companies in diverse tax jurisdictions still lead to a high income tax burden. Additionally, negative contributions arose again from partially non-deductible interest expenses and from currently not capitalisable tax losses, especially in Switzerland.

Divisional information

Major sales contributor was again the division Aerospace & Industrial Components with T€ 73,548 (46%). The division Varta Micro Power contributed with T€ 61,248 (38%) and the division Metal Tech with T€ 25,066 (16%). The divisional development for the 1st half-year was, however, diverse.

The sharp decline in sales of industrial components in the division Aerospace & Industrial Components marked the first half-year of 2009. This decrease could not be offset by higher sales for aerospace products in the 2nd quarter any longer, since a first decline in sales, compared to the previous year, had to be registered in this area as well.

The division Varta Micro Power also had to report a decline in sales of T€ 10,237 compared to the 1st half-year 2008.

Despite the difficult economic environment and supported by the still existing high order backlog, the division Metal Tech increased net sales by 17% in the 1st half-year compared to the same period of the previous year.

In the 1st half-year 2009, the division Aerospace & Industrial Components remained major contributor to Group EBIT with T€ 4,252 (1st half-year 2008: T€ 9,123), whereas the geographical area USA managed to generate a better result in the 1st half-year 2009 than in the corresponding period of the previous year. Due to the ongoing weak demand for industrial components, the result for the geographical area Switzerland was negative.

The EBIT of the division Varta Micro Power was T€ 4,144 (1st half-year 2008: T€ 3,324), representing an increase of 25%. The resulting EBIT margin was 6.8% (1st half-year 2008: 4.6%). The improvement of the EBIT margin is due to the finalised restructuring programme and to the impact of the exceptional income already explained.

The division Metal Tech contributed T€ 2,053 (1st half-year 2008: T€ 1,720) to the EBIT of the Group. Finally, EBIT in the Corporate Center and eliminations resulted in a consolidated amount of T€ -504 (1st half-year 2008: T€ -1,491).

BALANCE SHEET AND FINANCIAL POSITION

Group equity increased by T€ 8,187 from its level at year-end 2008 to T€ 108,422. This was due to the successful capital increase. Foreign exchange effects had a negative impact on the Group equity in the 1st half-year 2009. The equity ratio at June 30, 2009 amounted to 28.7% (December 31, 2008: 26.3%).

Increase in property, plant and equipment is primarily caused by the “green-field project” in Romania (division Aerospace & Industrial Components). Property, plant and equipment of this entity increased by T€ 8,073 in the 1st half-year 2009.

In the 2nd quarter inventories could be further reduced. In total, the reduction amounts to T€ 8,288 since the year-end 2008. Trade receivables increased, compared to year-end 2008, by T€ 1,888.

Cash and cash equivalents amounted to T€ 32,536 and were well above their value at balance sheet date 2008 (T€ 30,343). The increase is due to payments resulting from the capital increase, which were recognised in the 2nd quarter.

Regarding the development of liabilities to financial institutions, it should be noted that the increase of bank loans is caused by financing the project in Romania and by the partial use of a working capital line in the division Aerospace & Industrial Components. Repayments in the divisions Varta Micro Power and Metal Tech had a countervailing impact.

As of 30 June 2009, net debt in a narrow sense¹ is T€ 83,843 (net gearing in a narrow sense is 77% relative to total equity). Net debt in a wide sense² is T€ 131,771 (net gearing in a wide sense is thus 122% relative to total equity).

Trade payables and advances received were reduced by T€ 10,182 in relation to their unusually high value as of December 31, 2008, mainly because of lower purchasing volumes.

CASH FLOW DEVELOPMENT

Cash flow from operating activities amounted to T€ 10,346 compared to T€ 9,180 in the 1st half-year 2008. This increase was mainly due to the better result.

Cash flow from investing activities changed from T€ - 8,670 to T€ -18,634. This massive increase can be attributed to payments for the acquisition of property, plant and equipment for the construction of the new plant in Romania and purchase price payments in the division Aerospace & Industrial Components.

Cash flow from financing activities improved from T€ -1,385 in the previous year to T€ 10,876. The difference results from payments received in the course of the capital increase. The increase of bank loans in the division Aerospace & Industrial Components (mainly for UAC Europe S.R.L.) amounts to T€ 9.877. However, repayments of T€ 5,503 for bank loans and interest payments of T€ 2,890 have been made.

1) Net debt in a narrow sense - Liabilities to financial institutions minus liquid funds

2) Net debt in a wide sense - Financial liabilities (including convertible bond) minus liquid funds

DEVELOPMENT IN THE SECOND QUARTER

In the 2nd quarter sales of the MTC Group amounted to T€ 74,731 (Q2 2008: 91,737). Thereby, the division Aerospace & Industrial Components contributed T€ 32,325 (43%), the division Metal Tech T€ 13,099 (18%) and the division Varta Micro Power T€ 29,307 (39%).

EBIT for the 2nd quarter was T€ 4,014 (Q2 2008: T€ 6,066), whereby the division Aerospace & Industrial Components contributed T€ 661 (Q2 2008: T€ 4,265), the division Metal Tech T€ 974 (Q2 2008: T€ 973) and the division Varta Micro Power T€ 2,534 (Q2 2008: T€ 1,482) respectively. Finally, EBIT in the Corporate Center and eliminations amounted to T€ -155 (Q2 2008: -654).

EVENTS AFTER THE BALANCE SHEET DATE

There have been no further events between June 30, 2009 and September 4, 2009 (editorial deadline), that have a significant impact on the results of the Group.

OUTLOOK

Order situation in the division Aerospace & Industrial Components and in the division Metal Tech is not satisfactory for the time being. Therefore a less positive development of MTC's business performance is to be expected for the 2nd half-year 2009 compared to the 2nd half-year 2008, which – before restructuring charges - was characterised by a good performance. Consequently, for the time being, we cannot disclose precise result expectations for 2009.

Already initiated cost savings and the restriction of capital expenditure to replacements, necessary improvements and projects with short payback periods will be continued.

Due to the slump in demand of industrial components, further human resource measures in the division Aerospace & Industrial Components in Switzerland have become unavoidable. A consultation procedure with the employee representation council, which includes the termination of short-time work, the reduction of 50 employees and the increase of working hours has already been completed. If necessary, further personnel flexibility measures in all divisions are possible. Positive impacts on the cost structure of the Group will become effective from 2010 onwards.



CONSOLIDATED BALANCE SHEET AS OF JUNE 30, 2009

ASSETS (in T€) unaudited according to IFRS	Dec. 31, 2008	June 30, 2009
Intangible assets	80,595	79,685
Property, plant and equipment	131,810	134,065
Other non-current assets and receivables	10,662	10,560
Non-current assets	223,067	224,310
Inventories	71,496	63,208
Trade receivables	40,492	42,380
Other current assets and receivables	15,325	15,446
Cash and cash equivalents	30,343	32,536
Current assets	157,656	153,570
Total assets	380,723	377,880

LIABILITIES AND SHAREHOLDERS' EQUITY (in T€) unaudited according to IFRS	Dec. 31, 2008	June 30, 2009
Shareholders' equity MTC AG	61,580	72,457
Minority interests	38,655	35,965
Shareholders' equity	100,235	108,422
Liabilities to financial institutions	55,571	63,704
Other non-current financial liabilities	39,210	40,405
Deferred tax liabilities	22,738	22,316
Post employment benefits and other employee benefits	13,354	13,747
Other non-current liabilities and provisions	5,351	4,599
Non-current liabilities	136,224	144,771
Liabilities to financial institutions	57,092	52,675
Other current financial liabilities	6,668	7,523
Provisions	19,027	19,663
Trade payables and advances received	30,602	20,420
Accruals	16,179	16,878
Other current liabilities	14,696	7,528
Current liabilities	144,264	124,687
TOTAL LIABILITIES	280,488	269,458
Total liabilities and shareholders' equity	380,723	377,880

CONSOLIDATED INCOME STATEMENT AS OF JUNE 30, 2009

(in T€) unaudited according to IFRS	1-6/2008	1-6/2009
Net sales	179,531	159,862
Change in finished and unfinished goods and other operating income	4,511	-2,061
Cost of materials, supplies and services	-82,314	-60,631
Personnel expenses	-53,435	-52,405
Depreciation and amortisation	-7,123	-7,802
Other operating expenses	-28,494	-27,018
Operating result before private equity fund management fees	12,676	9,945
Private equity fund management fees	-3,478	0
Operating result after private equity fund management fees	9,198	9,945
Interest income and expenses	-4,403	-4,890
Other financial result - net	-2,162	-627
Income before tax	2,633	4,428
Income tax expense	-2,410	-3,866
NET INCOME FOR THE YEAR	223	562
Thereof:		
Shareholders' MTC AG	-984	2,030
Minority interests	1,207	-1,468
Net income for the period	223	562

CONSOLIDATED CASH FLOW STATEMENT AS OF JUNE 30, 2009

(in T€) unaudited according to IFRS	1-6/2008	1-6/2009
Cash flow from operating activities	9,180	10,346
Cash flow from investing activities	-8,670	-18,634
Cash flow from financing activities	-1,385	10,876
Net change in cash and cash equivalents	-875	2,588
Cash and cash equivalents as of January 1	23,922	30,343
Effect of exchange rate changes	-529	-395
Cash and cash equivalents as of June 30	22,518	32,536

Divisional Presentation



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AEROSPACE AND INDUSTRIAL COMPONENTS

In the 2nd quarter 2009, the division Aerospace & Industrial Components had to face a further decline in sales. The decline in sales of industrial components could no longer be compensated by aerospace products. In total, this led to a decline in net sales of 15% compared to the corresponding period of 2008.

Due to the continuing weak demand for industrial components, a reduction of personnel in Switzerland has become unavoidable to sustainably secure the competitiveness and the liquidity of the entity. The start of the production in the Romanian plant and the certification process led to start-up losses in the 1st half-year, which will continue in the remainder of the year. The break-even is expected for the year 2010.

Aerospace

In the 2nd quarter, the aerospace sector registered first reductions in market demand; due to the ongoing weakness of the market no increase in demand is expected in the second half-year of 2009. The build rates of the most important aircraft manufacturers are the single most significant factor for the profitability of this sector, a reduction below the actual level would have negative impacts on the result quality.

Beside the necessary investments for the construction of the new plant in Romania, the presses of UAC in the US locations will gradually be converted from the direct to the indirect technology in the coming years. This will result in an expected productivity increase of up to 25%. Furthermore, in the medium term the construction of a billet casting house in Romania, an investment in a heavy press in the USA as well as the extension of production to new business areas will be examined. This shall strengthen the strategic focus of this area.

Industrial Components

The ongoing weak economy led to a slump in market demand of up to 45%. This situation continued in the 2nd quarter 2009. The sales decreased by 50% which led to a considerable negative result. A capacity utilisation of less than 9,000 tonnes in 2009 is still expected.

With the personnel measures described above the company is prepared to regain profitability and will be able to participate in a general economic upturn. Medium to long term however, aluminium components are expected to continue their successful development in virtually all industrial sectors. Additionally, the focus on six strategic business areas for the sector Industrial Components will show positive results.

(in T€) unaudited according to IFRS	1-6/2008	1-6/2009
Net sales	86.689	73.548
EBITDA	12.115	8.449
EBIT	9.123	4.252





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METAL TECH

METAL TECH

Also in the 1st half-year 2009, the division Metal Tech was able to increase its earnings compared to the 1st half-year of the previous year. This development was supported by the substantial order backlog from 2008. Because of the strong position in the world market, profit margins could be kept stable.

The incoming orders in 2009 for both, new machines as well as „Life Cycle Business“, are still low. Therefore, a significant decrease in earnings is expected in the 2nd half-year.

Because of the ongoing weak demand, management reserves the possibility of human resource measures and restructuring steps to compensate the lower capacity utilisation and secure the profitability of the division.

(in T€) unaudited according to IFRS	1-6/2008	1-6/2009
Net sales	21.357	25.066
EBITDA	2.242	2.519
EBIT	1.720	2.053





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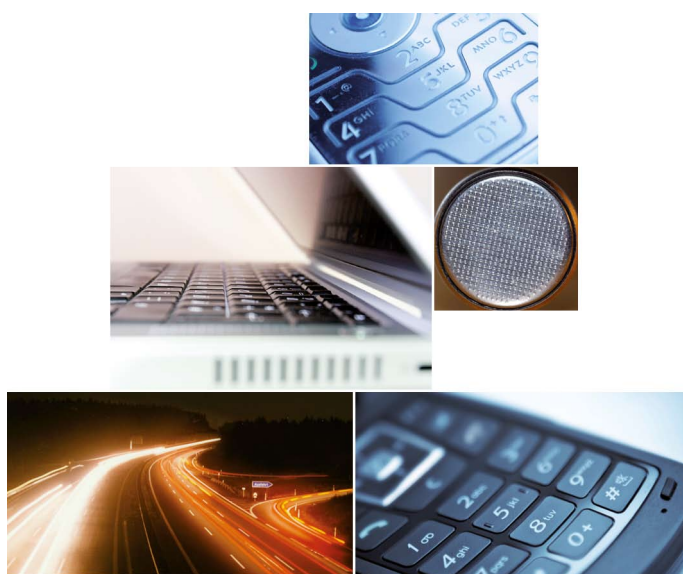
As already became apparent in the 1st quarter 2009, sales declined compared to the 1st half-year 2008. However, the EBIT margin increased to 6.8% (Q2 2008: 4.6%) due the successful finalisation of the restructuring programme and due to a already mentioned income from an insolvency case.

The restructuring program due to the closure of the Lithium Polymer (LP) plant was fully implemented and finalised in the 1st half-year of 2009. All significant cash flows from these measures have also been recognised in this period.

The closure of the LP plant strategically leads the division away from a cell producer towards a solution provider with its own research & development. Now LP cells are externally purchased and tailored engineering and packaging in the LP sector are enhanced. The development of LP in the core area will be continued. In this regard, a Varta internal technology group was established which will provide development capacity for both the solution provider as well as defined external research projects.

In this context, negotiations regarding the participation in a joint venture with the goal to further expand the technological competence of the division are in the final stage.

(in T€) unaudited according to IFRS	1-6/2008	1-6/2009
Net sales	71.485	61.248
EBITDA	6.905	7.245
EBIT	3.324	4.144



Information about the Company

FINANCIAL CALENDAR 2009/2010

Dezember 11, 2009	Report on the 3rd quarter of 2009
April 20, 2010	Report on the 4th quarter of 2009
June 8, 2010	Report on the 1 st quarter of 2010

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The terms 'Montana Aerospace & Industrial Components', 'Montana Metal Tech' and 'Montana Varta Micro Power' are used respectively for Alu Menziken Holding AG respective UAC respective UAC Europe, MNI Holding GmbH and Varta Microbattery GmbH.

IMPRESSUM

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MNI Holding GmbH, VARTA Microbattery GmbH



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