During the course of this presentation we may make forward looking statements based on current expectations. Forward-looking statements pertain to future events and are subject to risks and uncertainties. The Company’s actual results may differ materially from results discussed in any forward-looking statements. For a complete discussion of risk factors that could affect the Company’s present and future financial results please refer to the Company’s Form 10K and Annual Report for the fiscal year ended January 27, 2002 and quarterly reports on Form 10-Q filed with the Securities and Exchange Commission.
World Leader in 3D Graphics & Visual Computing

Over 200 Million Unit Annual Market
Touching the Lives of Millions
The Choice of Leaders

- **COMPAQ PRESARIO DESKTOPS**
  - The #1 Retail PC OEM

- **DELL PRECISION™ WORKSTATIONS**
  - The World’s #1 Workstation OEM

- **DELL**
  - The World’s #1 PC OEM

- **TOSHIBA**
  - The World’s #1 & #2 Laptop OEMs

- **联想**
  - China’s #1 PC OEM

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PC World – Last 6 Months Reviews

Of the 30 systems reviewed, NVIDIA GPUs were in:
NVIDIA’s Execution Advantage

World’s largest 3D talent pool
Multiple world class GPU design teams
Proven record of execution
Broad Product Family

- **Desktop GPUs**
  - nVIDIA gForce4 Ti
  - nVIDIA gForce4 MX
  - nVIDIA gForce2 MX
  - nVIDIA TNT2

- **Desktop IGPs**
  - nForce 2

- **Mobile PC**
  - Quadro 4
  - Quadro 2

- **Workstation**
  - XGL
  - NVS
  - DCC
  - Quadro 2

- **Console**
  - XBOX
  - GPU
  - MCP

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Market Changing Products

- **Xbox**
  The World’s Most Powerful Game Console

- **Satellite**
  1955-S801
  The First True Mobile Desktop

- **iMac**
  The Industry’s Most Revolutionary Design

- **iF Design Award Winner 2002**
  The Industry’s First Mobile Workstations

- **DELL PRECISION M50**
  The evolution of the notebook PC

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Recent Key Design Wins

NVIDIA nForce Now Available in the Compaq D315 Business PC

Profile® 4 SE and 4 X

Apple
The new 17-inch widescreen iMac

NetVista A Series
Largest Fabless Semiconductor Company

- NVIDIA: 1,300
- Qualcomm: 1,180
- Xilinx: 1,135
- Via: 1,010
- Broadcom: 950
- Altera: 840
- Cirrus Logic: 530
- ATI: 465
- QLogic: 360
- PMC-Sierra: 340
- Sandisk: 300
- Lattice Semi: 295

Source – IC Insights 2002
The Beginning of a New Era

Next Generation Cinematic GPUs
100+ million transistors

High-level Shading Languages and DX9 & OGL2.0 APIs

Platform Transition

Stunning New Content

0.13um Process Technology
NV1
1994
400K transistors
50Mhz

SEGA Virtua Fighter
640x480 @ 30fps
1000 polygons/frame
4th Generation – Programmable Shaders

GeForce3
Spring 2001
55M transistors
40M polys/sec

Chameleon
1280x1024 AA @ 60fps
300K polygons/frame
150 operations/pixel
NVIDIA – Moore’s Law

GPU Performance (32 bit AA Fill Rate)

NVIDIA GPU’s

Intel CPU’s

CPU Performance (Megahertz)
Convergence of Film and Real-time Rendering

1991
1993
1999
2001

Film

1995
2001

Real-time
NV30 & Cg
Leading the Programmable Revolution
3D is an Exciting Growth Market

- A very large market
- Tons of headroom
- Large barriers to entry
- Compelling content
- End user passion
Personal Computers

- One size does not fit all
- Rich media requires different architecture
- Semiconductor technology creates discontinuities
- Exciting market dynamics
Traditional PC Architecture –
*Single Powerful Microprocessor*
Modern PC Architecture –
Multiple Specialized Processors
PC is the Center of "Digital Revolution"
Panels Become Pervasive

**Worldwide LCD Monitor Shipments to the PC Market**
(units in K). *Source: Gartner and Stanford Resources, 2001 - 2002*

- **Notebooks**
- **Desktop PCs**

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The Connected Home
The Home of the Future

- living room
- bathroom
- bedroom
- office
- kitchen
- playroom
- garage