



Agilent Technologies

Electronic Measurement Investor Forum



March 8, 2007



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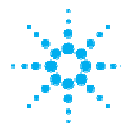


Agilent Technologies

Electronic Measurement Investor Forum

Rodney Gonsalves
Director, Investor Relations

March 8, 2007



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Safe Harbor Statement

These presentations contain forward-looking statements (including, without limitation, statements regarding the enhancement of shareholder value, our reduction of infrastructure costs in connection with our restructuring efforts, our ongoing share repurchase program, and information and future guidance on our goals, priorities, orders, revenues, demand, growth opportunities, customer service and innovation plans, new product introductions, financial condition, earnings, liquidity, capital structure, operating performance, cost structure, cyclicalities, the continued strengths and expected growth of the markets we sell into, operations, operating earnings, balance sheet models and our ability to be free cash flow positive under any normal economic environment) that involve risks and uncertainties that could cause results of Agilent to differ materially from management's current expectations.

In addition, other risks that the company faces in running its operations include the ability to execute successfully through business cycles while it continues to implement cost reductions; the ability to meet and achieve the benefits of its cost-reduction goals and otherwise successfully adapt its cost structures to continuing changes in business conditions; ongoing competitive, pricing and gross margin pressures; the risk that our cost-cutting initiatives will impair our ability to develop products and remain competitive and to operate effectively; the impact of geopolitical uncertainties on our markets and our ability to conduct business; the ability to improve asset performance to adapt to changes in demand; the ability to successfully introduce new products at the right time, price and mix, and other risks detailed in the company's filings with the Securities and Exchange Commission, including our Annual Report on Form 10-K for the twelve-month period ended October 31, 2006.

The company assumes no obligation to update the information in these presentations.

Agenda

7:30 A.M. to 8:30 A.M.	Registration and Continental Breakfast
8:30 A.M. to 9:00 A.M.	Pat Byrne: Electronic Measurement Overview
9:00 A.M. to 9:15 A.M.	Shiela Robertson – Electronic Measurement Financials
9:15 A.M. to 10:00 A.M.	Soon-Chai Gooi – General Purpose Test
10:00 A.M. to 10:15 A.M.	Break
10:15 A.M. to 11:00 A.M.	Ron Nersesian – Wireless Test
11:00 A.M. to 11:45 A.M.	David Churchill – Network and Digital Solutions
11:45 A.M. to 12:00 P.M.	Pat Byrne – Review and Closing Thoughts
12:00 P.M. to 1:00 P.M.	Lunch



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Patrick J. Byrne
President
Electronic Measurement

March 8, 2007



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A Focused Measurement Company

Measurement solutions that address critical customer challenges

Electronic Measurement

2006 Revenue: \$3.4 Billion

Expected Growth: 8%

General Purpose



FY06 Revenue
\$2 Billion

Communications



FY06 Revenue
\$1.4 Billion

Bio-Analytical Measurement

2006 Revenue: \$1.6 Billion

Expected Growth: 12%

Chemical Analysis



FY06 Revenue
\$900 Million

Life Sciences



FY06 Revenue
\$700 Million

Electronic Measurement

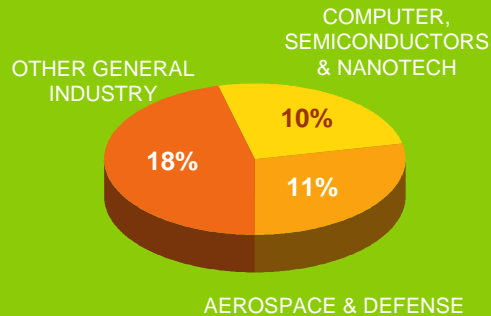
Short-term challenges and growth opportunities

Electronic Measurement
2006 Revenue: \$3.4 Billion
Expected Growth: 8%

General Purpose



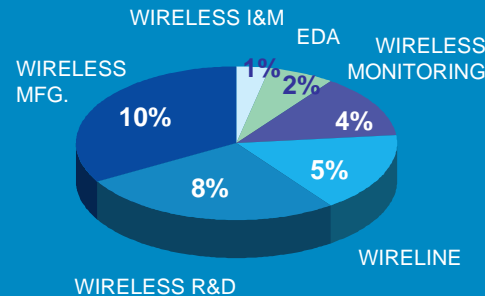
FY06 Revenue
\$2 Billion



Communications



FY06 Revenue
\$1.4 Billion



% of total Agilent Revenue

Short-term Challenges:

- Wireless Manufacturing

Opportunities:

- Low Cost Instruments
- Surveillance
- Wireless R&D
- IP Network Convergence
- Oscilloscopes
- Nanotechnology measurements in Electronics and Life Sciences

Electronic Measurement

\$20B total addressable market – significant opportunity for growth

Communications

Wireless



Wireline &
Network Test



Electronic Design
Automation



Total Addressable Market	\$13B
Market Growth Rate	5%
Agilent Share (FY06)	11%

Key Growth Drivers:

- New Voice, Video, Data Network Services
- Mobile internet drives growth in Protocol Test
- Digital “connected consumer” products
- R&D and design verification spending
- Digital and Radio Frequency (RF) Convergence

General Purpose

Aerospace
& Defense



Computer &
Semiconductor



Consumer
Electronics



Total Addressable Market	\$7.5B
Market Growth Rate	5%
Agilent Share (FY06)	26%

Key Growth Drivers:

- Recapitalization of test equipment systems:
 - Aerospace & Defense moving to LXI standard (Synthetic Instruments)
 - Commercial test systems upgrades
- Homeland Security driving surveillance
- Growing R&D & Electronic manufacturing in Asia

Electronic Measurement

Core business CAGR: 5-6% (2007-2009)

Communications



General Purpose



Core Business Initiatives

- Provide customers with excellent service and applications for new technologies
- Platform and Technology refresh and expansion (RF, LXI, USB Data Acquisition)
- Grow share – specifically in Oscilloscopes and Spectrum Analysis
- Leverage our channel in growing economies such as Asia and Eastern Europe

Key Growth Initiatives

\$4 billion expansion of served addressable market

Electronic Measurement +\$1 billion impact over 3 years

- Low Cost Instrumentation — Soon-Chai Gooi
- Surveillance — Ron Nersesian
- Wireless R&D — Ron Nersesian
- IP Converged Network — David Churchill
- Oscilloscopes — David Churchill

Accelerate growth while leveraging the operating model

Why We Will Win

- 3x the next largest competitor; strong financial foundation
- Leadership in customer satisfaction and loyalty
- Strong new product commercialization engine and portfolio
- Strategic focus on rapidly growing served markets and channels through selected growth initiatives
- Expanded rate of acquisitions





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Shiela Robertson

Vice President and Operational CFO

Electronic Measurement

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Electronic Measurement Operating Results

Q1 business model performed well through mixed end-market performance

	Q106	Q206	Q306	Q406	Q107	Q107, YoY
Orders	799	875	838	935	817	2%
Revenue	794	867	848	910	825	4%
Gross Margin	54.8%	55.5%	58.0%	56.6%	56.8%	1.9 pp
R&D	113	116	118	116	124	10%
as % of revenue	14.2%	13.4%	13.9%	12.8%	15.1%	0.9 pp
SG&A	233	244	249	254	249	6%
as % of revenue	29.4%	28.2%	29.3%	28.0%	30.1%	0.7 pp
Operating Profit	89	120	125	145	95	7%
Operating Margin	11.2%	13.8%	14.8%	15.9%	11.6%	0.3 pp
ROIC	18%	23%	24%	28%	19%	0.3 pp
Inventory Days	125	111	122	108	123	(2)
DSO	47	50	48	44	47	(0)

- Revenue grew 4% despite tough end market in wireless manufacturing test. Excluding that segment business was up 9% year over year.
- Good growth in general purpose test and stability in wireless markets other than manufacturing
- Seasonal business trends exist

Electronic Measurement Business Leadership

Business Unit	FY06 Revenue
Soon-Chai Gooi: Electronic Instruments Business Unit	\$0.8B
Ron Nersesian: Wireless Business Unit	\$1.5B
David Churchill: Network and Digital Solutions Business Unit	\$0.7B
Services/Other	<u>\$0.4B</u>
Electronic Measurement Total	\$3.4B

Summary

Maintaining discipline, leverage operating model to sustain growth

- Electronic Measurement enters 2007 with a robust operating model
- Focus now is to leverage our operating model through higher sustainable growth
 - Enhanced customer focus and rich new product pipeline
- Growth initiatives targeted at served market expansion opportunities and segments with rapid technological evolution and end market growth
- Continue operating discipline to maintain/grow margin structure and cash generation while accelerating top line growth



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Soon-Chai Gooi

Vice President and General Manager
Electronics Instruments Business

March 8, 2007



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Electronic Instruments Business Unit

Providing the broadest and most comprehensive portfolio of general purpose measurement products and solutions

Portable



- Robust mobile instruments that offer fast and accurate measurement

Benchtop



- Wide range of basic instruments for general purpose applications

Systems



- Cost effective testers and systems for electronic measurement applications

General Purpose Test Business Overview

World-class products, services and solutions for the electronics industry

Diverse Customer Base

- Electronic Manufacturing
- Installation & Maintenance
- Education Markets

Extensive Product Portfolio

- Cost Competitive Handhelds
- Entry Level to Mid range Bench Top Instruments
- Modular Instruments & DAQ solutions

Broad Spectrum of Applications

- Design Validation & Monitoring
- Field Troubleshooting, Repair & Calibration
- Teaching / Research Labs

Typical End Users

- Engineers / Technicians / Electricians in the electronic industry
- Students, Researchers & Professors in universities / colleges

Vast range of products for diverse customer base and multiple applications!

General Purpose Test Market Overview

Sizeable market with opportunities for growth

- **Total Addressable Market: \$7.5B**
- **Market Growth Rate: 5%**
- **What is driving growth?**
 - Growing Electronic manufacturing in Asia
 - Drive to improve test efficiency and demand for lower cost of ownership
 - High emphasis on education in emerging markets
 - Increased demand for high performance portable products

Market Sub-Segments



Consumer
Electronics



Aerospace &
Defense



Computer &
Semiconductor



Installation &
Maintenance



Education

Low Cost Instruments Growth Initiative

\$1 billion new market space for Agilent's growth

Recent News:

- Portable and affordable handheld spectrum analyzer that provides a balance of price and performance
- Feature-rich handheld digital multi-meters and oscilloscopes for quality-conscious and cost-sensitive customers
 - Handheld DMM recognized by EDN Magazine in their list of the "Hot 100 Products of 2006"
- Cost competitive RF Signal Generator and entry-level RF Spectrum Analyzer that deliver superior quality and lower cost of ownership

HOT
products
100



Market Opportunity

- \$1.0B addressable segment (within the \$7.5B general purpose test market)
- Agilent Share (FY06) : 9%
- Growth driver :
 - Electronic manufacturing growth, particularly in Asia & emerging markets (Latin America, Eastern Europe)

Key Applications

- Design validation
- Troubleshooting
- Installation & Maintenance
- Teaching and research tools

Agilent's Focus

- Develop market driven broad product portfolio to participate in the low cost instrument market
- Utilize distribution channel to reach a broad set of customers

Revenue grew over 20% from FY'05 to FY'06!

Low Cost Instruments: Why We Will Grow

Winning combination to capture the \$1B low cost instrument market

Breadth of Product Portfolio

- Rapid commercialization of Agilent's technology into products & solutions
- Expanding Agilent's leadership with cost competitive products



Extensive Global Coverage

- Capitalizing on Agilent's premier brand name to build a strong global distribution channel
- Harnessing the strength of established global footprint that offers unmatched services and support



Increase Competitiveness

- Leveraging on Asia Centers of Innovation and flexible supply chain to preserve operating margins
- Providing value products bearing the hallmark of Agilent for superior quality and reliability



Winning in Distribution

Major Product Releases

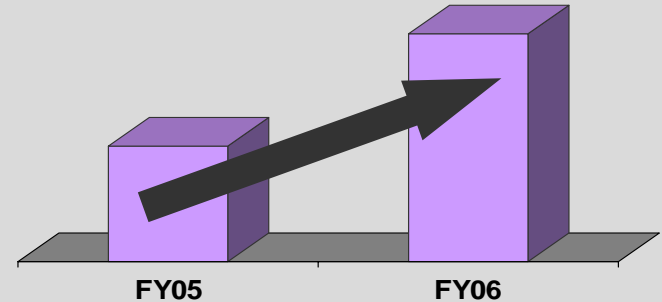
- Great acknowledgment from market!
- High resolution
- Robust & Durable



HH DMM

Total Distribution Orders*

- Growing our Distribution Network
- Increasing volume through Distribution



* Includes General Purpose Instruments and Scopes

- Deeper memory
- Color Display
- Faster Sampling Rates

Low Cost RF Signal Generator & Spectrum Analyzer



- Larger screen size & higher resolution
- Multi-language GUI
- Plug and Play with USB Interface

- Higher sampling rate
- Plug-and-Play with USB interface
- Dual play solution

HH Spectrum Analyzer



HH Scope

Digital Multimeter



USB Multifunction DAQ

Continuously Expanding Our Product Offering!

Why We Will Win

Winning combination to increase market share

Handheld Solutions



Modular Solutions



Bench Solutions



Software & Accessories



← **Multiple Platforms** →

- Commercializing Agilent's technology for rapid product generation
- Leveraging on Asia Centers of Innovation and supply chain to maintain competitiveness
- Capitalizing on Agilent's premier brand name to build strong distribution channel



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Break

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Ron Nersesian

Vice President and General Manager

Wireless Test Business

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Wireless Business Unit

World-leading supplier of wireless test products, services and solutions

Sensor Networks



A/D ATE
Milcomms
Surveillance

Electronic Design Automation



High Frequency
EDA

Signal Source



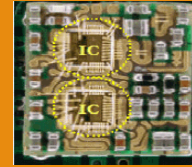
RF & microwave
Signal Sources
Baseband

Signal Analysis



RF & microwave
Spectrum
Analyzers

Component Test



RF & microwave
Network
Analyzers
Device Testers

Mobile Broadband



Radio &
Wireless Device
Testers

NORTHROP GRUMMAN

ERICSSON



Raytheon

NOKIA
Connecting People



SAMSUNG

Demanding Applications – Mobile devices, A/D electronics

SONY



LOCKHEED MARTIN
We never forget who we're working for™

Wireless Test

Test application solutions from EDA test through I&M – broadest solution set offering that addresses entire wireless electronics product life cycle

- #1 in wireless device manufacturing
- #1 in network analysis
- #1 in impedance analyzers
- #1 in signal generation
- #1 in spectrum analysis
- #1 in high frequency EDA software

Wireless Test Market Overview

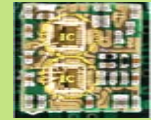
Sizeable market, strong underlying growth prospects

- Overall wireless communications market: **\$6.9 billion**
- Market growth: **4 to 5%**
- Underlying driver is the movement to a converged wireless world of ubiquitous voice, video, data resulting in increasing complexity of design and test
- Mobile manufacturing segment likely soft in Q2 with gradual recovery in 2nd half

Market Sub-Segments



Wireless R&D



Wireless Manufacturing



EDA Tools



Installation & Maintenance



Handset Manufacturing Overview

What's happening in wireless handset manufacturing?

Market Highlights

- 1 billion cell phones produced last year – Agilent tests about 70% of units

5 Wireless Manufacturing Dynamics

1. Majority of growth is in developing regions with mature low margin technology
2. Big players cut prices to compete for market share
3. Seasonality effect with the pause in demand after the holidays
4. Slowdown in short-term growth rates
5. Lowering cost of test

Market Outlook

- Mild manufacturing recovery in the second half of this year

Wireless Business Unit Growth Playbook

1. Ensure financial health to enable focus on growth
2. Launch major new platforms
3. Lead in applications
4. Free up resources from R&D efficiency improvements in existing markets
5. Shift investment and resources to served market expansion
6. Identify and execute on inorganic growth
7. Increase aggressive approach throughout whole organization

Wireless R&D Growth Initiative

Strategic focus on R&D solutions enables growth

Recent News:

- World's First Integrated Mobile WiMAX Test Set – together with Innowireless.
- Agilent Technologies Demonstrates its Commitment to Innovative 3G LTE Measurement Solutions at 3GSM 2007.



Market Opportunity

- \$720M addressable segment, 6% Growth
- Agilent Share (FY06): 18%
- Key growth drivers:
 - New technologies and increased protocol complexity
 - Converged devices and interoperability challenges

Key Users

- Cellular phone manufacturers, operators and the related chip and software supply chain
- Equipment manufacturers and service providers who deliver the “triple play” of voice, video and high-speed Internet over a single wireless access point

Agilent's Focus

- New R&D solutions including:
 - 3G real world test,
 - wireless convergence,
 - application development

Revenue grew over 20% from FY'05 to FY'06!

Wireless R&D: Why We Will Grow

Addressing the growing complexity in wireless communications

Strong Market Need — Large Market Opportunity

- Complex wireless devices drive increasing design, verification, interoperability, and acceptance challenges.
- Demand increasing for network emulation and abilities to validate total phone performance throughout development and deployment lifecycle

High-Value Lower Volatility Business

- Growing software contribution allows strong gross margins
- Relatively low cyclicalality of R&D as compared to manufacturing

Focused Organization to Deliver Results

- New Mobile Broadband Division
- Early engagement with market-makers around new technologies
- Pursuit of new sub-segments

Surveillance & A/D Automated Test Growth Initiative

Solutions for the new defense paradigm

Recent News:

- Agilent Technologies Completes Acquisition of Acqiris, a Leading Provider of High-Speed Digitizers and Analyzers
- Agilent inks \$12.6 million contract with Raytheon



Market Opportunity

- \$800M addressable segment, 6-7% Growth
- Agilent Share (FY06): 4%
- Key growth drivers:
 - Homeland security
 - Recapitalization of electronics test systems

Key Users

- Government defense/security departments and prime contractors

Agilent's Focus

- Leverage our technology and capabilities into SIGINT (Signals Intelligence – process of capturing electrical impulses and processing to derive intelligence information) and other Surveillance applications for domestic and international markets
- Subsystem supplier into key programs

Surveillance & A/D Automated Test: Why We Will Grow

Solutions for the new defense paradigm

Strong Market Need — Large Market Opportunity

- Homeland security driving new needs for surveillance
- Massive recapitalization of electronic instrument test systems

High-Value Surveillance Business

- Heavy software contribution allows strong gross margins
- Delivering high value subsystems into programs with government defense/security agencies and prime contractors
- Synergistic synthetic instruments business leverages existing products and technologies

Focused Organization to Deliver Results

- New Division focus
- Investing to Win — Agilent will invest significantly in both organic growth and M&A to achieve this goal

Why We Will Win

#1 in Wireless Test Solutions

- Growing leadership in applications for new technologies and will be first to market with new enabling solutions (e.g. LTE, WiMAX, UMB...)
- Shifting investment towards target areas of market expansion
- Expanding use of partnering and acquisitions to rapidly broaden our sales
- Working collaboratively with market leaders to innovate new solutions early in technology lifecycles



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David Churchill

Vice President and General Manager
Network and Digital Solutions Business






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Network and Digital Solutions Business Unit

“World leader in network and digital solutions”

<p>Design Validation</p>  <p>Real-Time Oscilloscope Solutions</p>	<p>Digital Verification</p>  <p>High-Speed Debug, Characterization, and Validation Solutions</p>	<p>Data Network Test</p>  <p>Protocol & Services Testing</p>	<p>Broadband Infrastructure Test</p>  <p>Installation & Maintenance Tools</p>	<p>Assurance Solutions</p>  <p>Automated Probe-Based Measurement Solutions</p>
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- Network test market: **\$6.1B**
- Market growth: **5 to 6%**
- Driven by:
 - Increased protocol complexity and converged devices
 - Triple play and mobile services over a converged IP network

Market Sub-Segments

- Wireline
- Operations Support Systems
- Mobile Networks

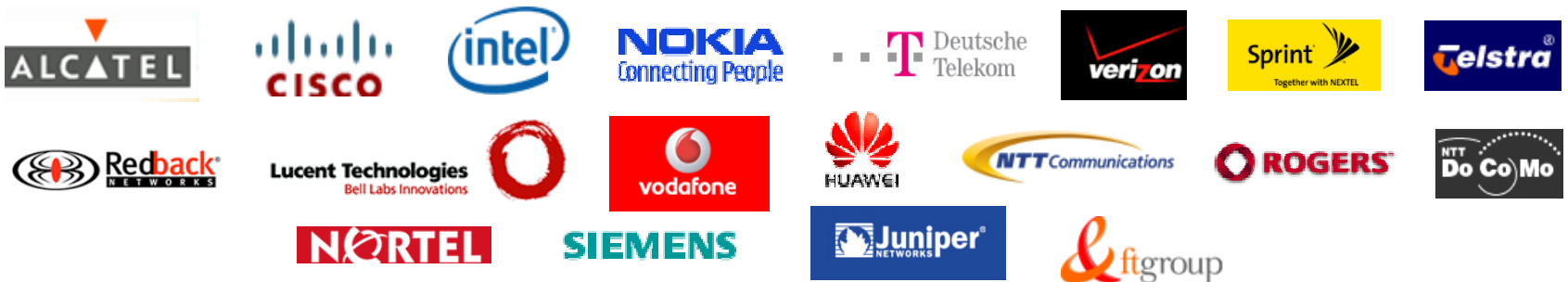
Network Solutions

Market Trends:

- The convergence of legacy voice, video, and data networks onto a common IP architecture, Ethernet transport and IMS
- Worldwide broadband subscribers hit 176 Million in 2005, projected to grow to 350M by 2009
- Worldwide mobile subscribers reached 2.0 Billion in 2005, projected to grow to 2.9B in 2009
- New IP network convergence (IPNC) services such as IPTV and high-speed mobile data drive the build-out of enterprise and metro optical networks. Heavily influenced by Ethernet trends: 10G E & metro Ethernet

Test Needs:

- Manage quality of service and quality of customer experience on the new IPNC network
- Test the increasing complexity of the IP-based network infrastructure and services



Digital Solutions

Market Trends:

- Proliferation of consumer products with High-Speed digital interfaces such as HDTV, Set Top Boxes, video game consoles
- Increased adoption of serial buses and FPGA's. Storage market transition to 4Gb/s Fibre Channel and beyond

Test Needs:

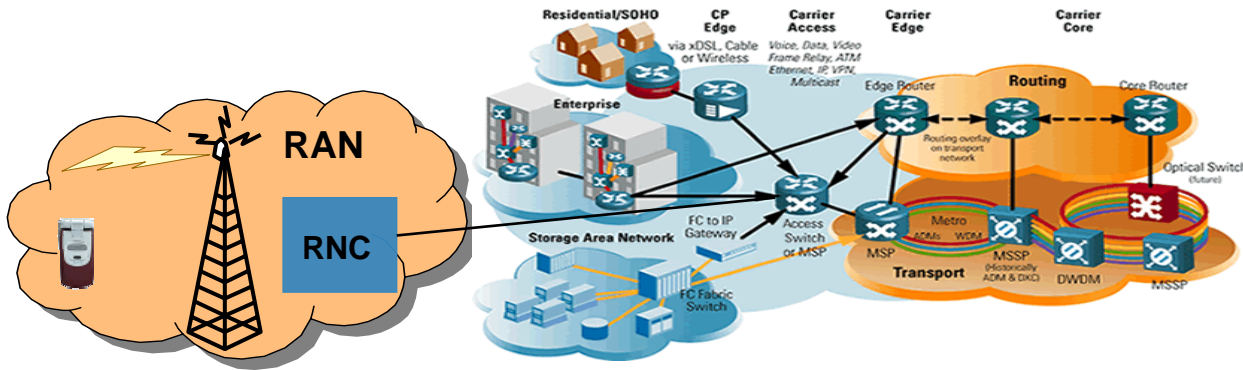
- Compliance, complexity, signal integrity, and jitter testing
- Lower cost of test
- More embedded logic analysis and increasing adoption of high speed serial protocols



Finisar



Broadest Solutions vs. Competitors



- Agilent offers the most comprehensive solutions portfolio to the industry
- While there are many niche competitors, even Agilent's larger competitors have strength in limited market segments.

	Mobile	Access	Metro	Core
Assure	Tektronix Enabling Innovation			Anritsu
Optimize				
Deploy		EXFO EXPERTISE REACHING OUT FLUKE	ACTERNA	
R&D		IXIA	SPIRENT Inspired innovation	
Supply Chain				Anritsu

- Network-wide monitoring & troubleshooting
- Optimization across multiple technologies
- Installation, service quality test & troubleshooting
- Infrastructure validation across core, edge and broadband access
- Comprehensive solutions for optical and electrical device & component test

Internet Protocol Network Convergence Initiative

Consolidation of voice, video and data over a single access point

Recent News:

- Industry-First Triple Play Analyzer Helps Increase Market Share With Single Test Solution for IPTV, VoIP, and Data Services.
- Enable IP network transition with Agilent's large installed base Industry's Most Comprehensive Solution for Monitoring, Troubleshooting SIGTRAN for Converged Networks-- the assureME Applications Help Operators Accelerate Deployment of SS7 over IP Networks to Manage Customer, Service and Network Quality



Market Opportunity

- \$2.3B addressable segment (within total \$13B comms market)
- Agilent Share (FY06): 16%
- Growth drivers:
 - Increased protocol complexity and converged devices
 - Triple play service delivery over a converged IP network

Key Applications

- Protocol and conformance test for equipment manufacturers and service providers who deliver the “triple play” of voice, video and high-speed Internet services
- Network monitoring, verification, and troubleshooting for service providers and equipment manufacturers

Agilent's Focus

- Provide network measurement and service assurance solutions to enable the transition to the converged all IP-based network

IP Network Convergence: Why We Will Grow

Exploiting growth in next generation networks and services

Technical Leadership

- Exploiting Agilent's technical leadership and measurement knowledge across the network to grow with targeted market opportunities.
- Catch the new technology waves
- High growth segments undergoing dramatic change



Customer Intimacy with Market Makers

- Develop and nurture close working relations with market makers in the telecom industry to expand with next-gen technology rollout
- Wireless, IPTV, IMS, Video.
- Best- in-Class customer experience



Accelerate Growth

- Accelerate growth through portfolio and channel expansion
- Technology development acceleration
- Use M&A to complement growth strategy and enhance leadership position



Oscilloscope Growth Initiative

Recent News:

- Agilent Technologies leads in high performance oscilloscopes: the 80000B series of real-time oscilloscopes has been selected as the 2007 Test Product of the Year by a vote of *Test & Measurement World* readers
- Agilent continues to lead in application specific solutions, now offering over forty solutions for oscilloscopes. New Q107 solutions include DDR2, Ultra Wideband and FlexRay



Market Opportunity

- \$1B market, 5% Growth
- Agilent Share (FY06): 24%
- Key growth drivers:
 - Proliferation of multi-Gb/s high speed digital links
 - Increasing digital content and smarter electronic devices
 - Growth of electronics in Asia

Key Applications

- R&D pushing performance of new high speed devices in the computer, communications and component industries.
- R&D design of increasingly sophisticated, low cost, embedded systems.

Agilent's Focus

- Emerging high-speed digital standards that are revolutionizing the performance of information technology and communication systems.
- Advanced devices such as FPGAs, systems on a chip, and microcontrollers for state of the art embedded systems.

Revenue grew over 20% from FY'05 to FY'06!

Oscilloscopes: Why We Will Grow

Expanding addressable market, technology leadership, applications focus

Expand Addressable Market

- Agilent is expanding its oscilloscope offerings across all six market sub-segments:
 - sampling
 - high-performance real-time
 - general purpose lab
 - high-performance portable
 - general purpose portable
 - economy and hand-held



Leverage Technology Expertise

- Leverage technology expertise of the world's #1 test & measurement company (Agilent Labs)
 - RF technology enables industries lowest noise oscilloscopes (DSO80000 Series).
 - Unparalleled integration led to unique 1U high LXI scope.



Customer Focused Applications

- Leader in customer focused solutions in high growth application areas such as:
 - PCI-Express, FBD, DDR, GigE, FC, SATA, SAS, DVI, HDMI, Flex-Ray, CAN, LIN, and FPGA Dynamic Probes.
- In the last six months, Agilent has introduced 8 new or updated solutions



Why We Will Win

- Largest portfolio of digital tools
- Rebuilding communications test business for profitable growth
- Agilent's measurement portfolio breadth across the network
- Distribution channel access to customers expands market





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Patrick J. Byrne
President
Electronic Measurement

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Why We Will Win

- 3x the next largest competitor; strong financial foundation
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