

NVIDIA Analyst Day

June 20, 2007

**Michael Rayfield, General Manager
Mobile Business**

Continued Momentum

New devices for 2007



O2 XDA Flame



MOTORAZR
Maxx



iPod Video



MOTORAZR
V3xx



Modeo DVB-H



Kyocera
W52K



Sansa e200

The World is Changing

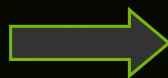
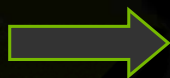


Market Continues Shift Toward User Experience



- **Consumer electronics going mobile (Music, Video, Nav devices)**
- **Phones becoming consumer electronics devices**
- **Market is shifting toward NVIDIA's unique strengths**
 - **Rich user experience**
 - **Fast time to market**

User Experience Drives Market Shifts



Truly Mobile
Experience

Long Battery
Life

True Multimedia
Experience
w/ 3G Data

Rich User
Experience



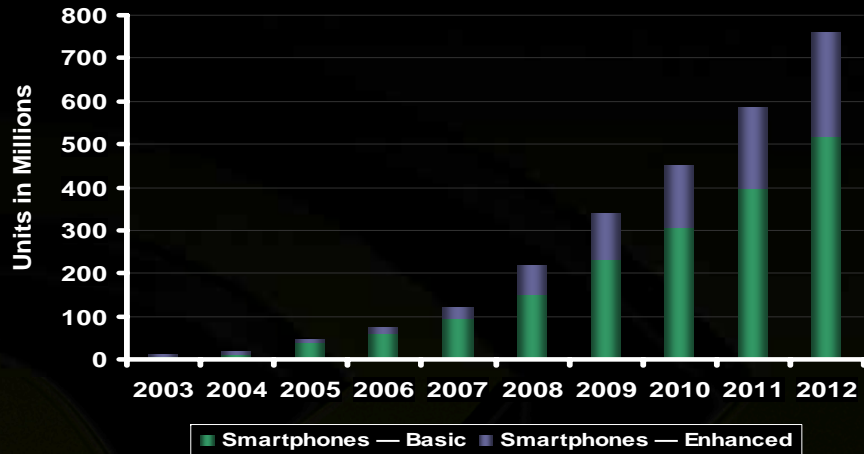
APPLICATION PROCESSORS

“Transforming Your Mobile Phone Into Your Most Personal Computer”

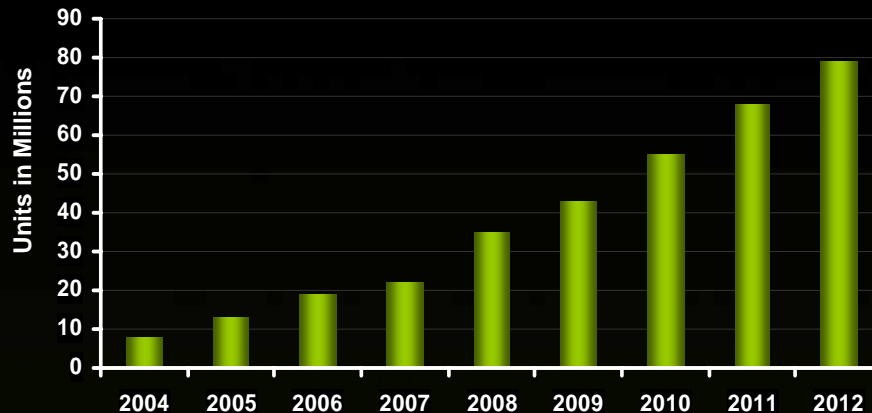
AP Market Opportunity



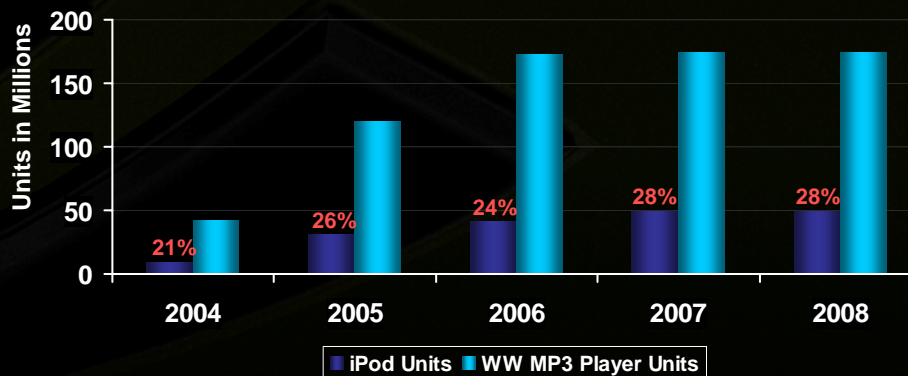
Smartphones



Personal Navigation Devices



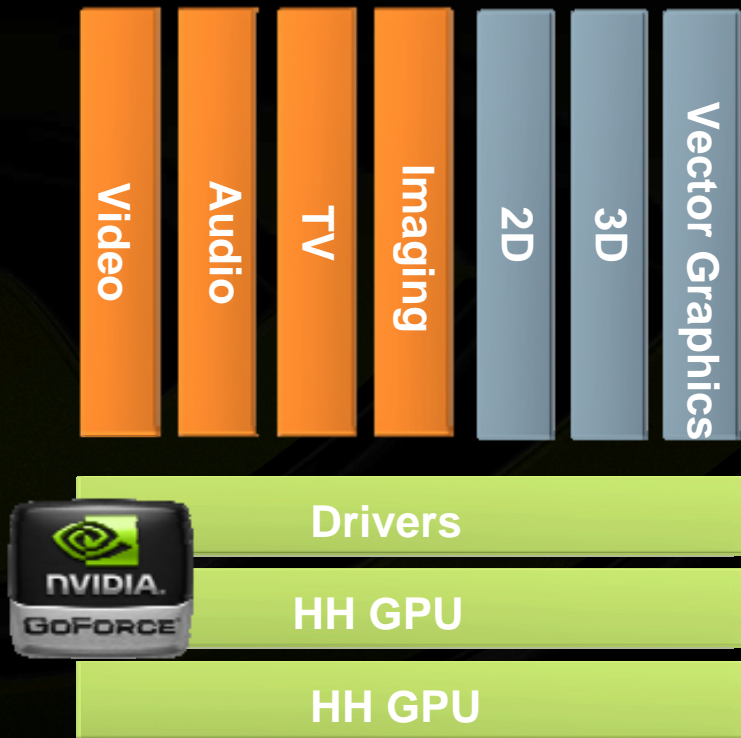
Personal Media Players



Notes

- 1.) 2012 Mobile Phone SAM is \$6 B.
- 2.) 2012 PND SAM is \$1 B.
- 3.) 2012 PMP SAM is \$500 M.

Strategic Investment



Aug 2003

- Low Power graphics devices



Mar 2006

- Embedded multimedia SW



Mar 2006

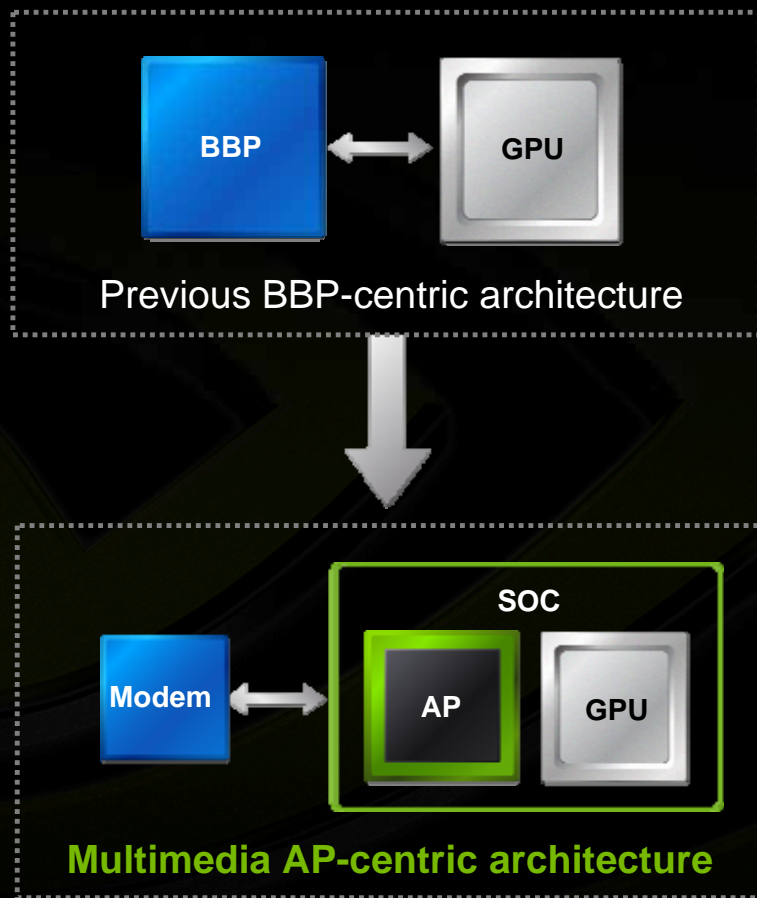
- Embedded graphics SW



Jan 2007

- Personal media devices

The Mobile Platform Becomes a Computer



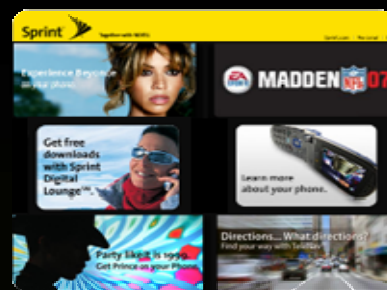
- True computing architecture
- Hold comms stack constant – modem is commodity
- Full-feature OS allows complex MM apps

Application Processors at NVIDIA



- GPU has filled holes left by SOC's
 - Shorter design in
 - Frequent design cycle
 - Latest digital media algorithm development
- Merge SOC and GPU into one chip
- Maintain pace of GPU
- A new breed of Processor

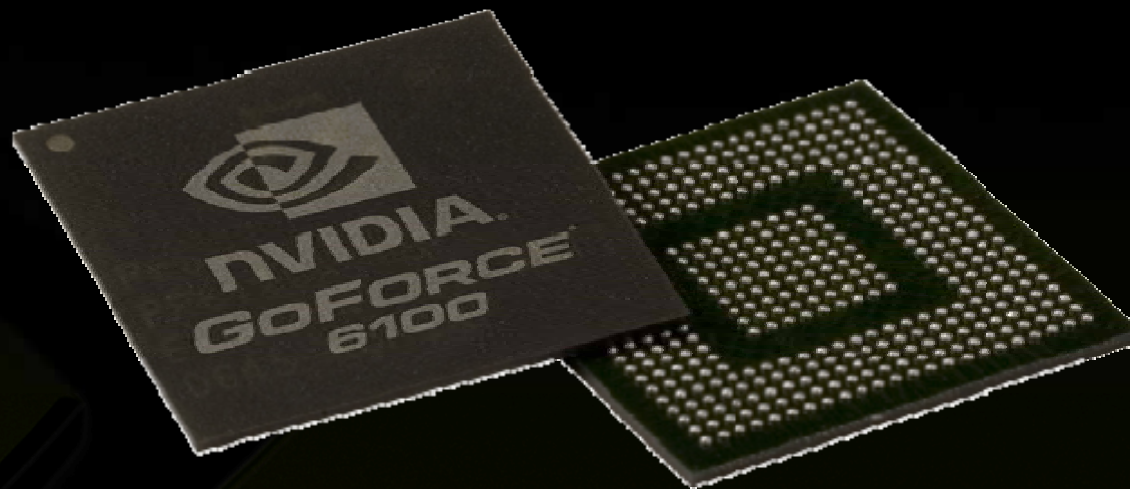
Mainstream Multimedia Content



Consumers Require Compelling Experiences



GoForce 6100 NVIDIA's First AP



- Industry's Lowest Power
- Mobile Entertainment
- Volume Ramping Now



APPLICATION PROCESSORS

“Transforming Your Mobile Phone Into Your Most Personal Computer”

