WE BUILD TOGETHER
THE FUNDAMENTS OF THE FUTURE

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Dell Technologies Forum 2019
SCALE

>2B PERSONAL COMPUTERS

14 FABS

107K EMPLOYEES

IN 46 COUNTRIES
OUR HISTORICAL TAM... LIMITED GROWTH OPPORTUNITIES

~$35B
2018 MSS
PC CPU (x86 compute)
>90% MSS

~$17B
SERVER CPU (x86 compute)

TOTAL TAM
~$52B

SOURCE: 2018 INTEL REVENUE IS BASED ON INTEL FINANCIALS. 2018 TAM IS BASED ON AMALGAMATION OF ANALYST DATA AND INTEL ANALYSIS. PC AND SERVER INCLUDE CPU AND CHIPS SETS REVENUE.
2023F TAM is based on an amalgamation of analyst data and Intel analysis, based upon current expectations and available information and is subject to change without notice.

PC-Centric includes CPU & Chipsets, Connectivity (including modems other than 5G smartphone), Gateways, Gaming Consoles, Memory and Discrete Graphics. Data-Centric includes Data Center and Networking Compute, Memory, Storage and Connectivity, and IOT addressable Logic ASIC/ASSP, MPU, MCU, DSP for Industrial, Transportation, Automated Driving, Retail, Video Surveillance, Healthcare, Public Sector, Office Automation, Gaming and Smart Home. IOT also includes MaaS and intelligent transportation enabled data opportunities.
OUR STRATEGY

MAKE THE WORLD’S BEST SEMICONDUCTORS

LEAD THE AI, 5G, AND AUTONOMOUS REVOLUTION

BE THE LEADING END TO END PLATFORM PROVIDER FOR THE NEW DATA WORLD
OUR GAME PLAN... REDEFINING INTEL INSIDE

INTEL INSIDE = CPU INSIDE A PC AND SERVER

INTEL INSIDE = XPU PLATFORMS INSIDE EVERYTHING
CLIENT COMPUTING

THE HUMAN EDGE IN DATA-CENTRIC WORLD
MACRO TRENDS

CREATE

CONNECT

FOCUS

INTEL IS UNIQUELY POSITIONED TO CAPITALIZE ON TRENDS
PROJECT “ATHENA” INNOVATION PROGRAM

LAPTOP INNOVATION ROOTED IN HUMAN UNDERSTANDING

READY TO GO BEFORE YOU ARE
WORRY FREE DAY OF BATTERY LIFE

PERFORMANCE & RESPONSIVENESS
ALWAYS FAST, RELIABLY CONNECTED

ARTIFICIAL INTELLIGENCE
FORM FACTOR & INTERACTION

FOCUS
ALWAYS READY

ADAPTIVE
INCREASED PRODUCTIVITY AND PERFORMANCE SCALING FOR DEMANDING MULTITHREADED WORKLOADS
PLATFORM INNOVATION

OPTANE™
FASTER WI-FI
THUNDERBOLT™ 3
CHASSIS
BATTERY LIFE
INTEL® OPTANE™ MEMORY VISION

TRADITIONAL MEMORY/STORAGE

- Processor ➔ Memory
- Chipset ➔ Storage

INTEL® OPTANE™ MEMORY

- Processor ➔ Memory
- Chipset ➔ Storage
- System Accelerator ➔ Storage

2LM

- Processor ➔ Memory
- Memory Expansion & System Accelerator ➔ Storage

PERSISTENT MEMORY

- Processor ➔ Memory
- Memory Expansion & Persistent Memory ➔ Storage

Accelerated system responsiveness
Optimized productivity

Improved overall system performance/ responsiveness
Zero power instant on
Lower cost memory capacity upgrades

High performance/ responsiveness for system and applications
Near instant reboot
Responsive task switching between all apps in system
Manipulate CC app content with real time responsiveness
INTEL® OPTANE™ MEMORY H10 WITH SOLID STATE STORAGE

WORKING DATA

CLIENT

FAST ACCESS

CAPACITY DATA

LARGE CAPACITY
THE DATA-CENTRIC WORLD
ACCESS THE VALUE OF DATA
THE DATA-CENTRIC WORLD

OVER HALF OF THE WORLD’S DATA

WAS CREATED IN THE LAST 2 YEARS

LESS THAN 20% HAS BEEN ANALYZED

Source: Data Age 2025, sponsored by Seagate with data from IDC Global DataSphere, Nov 2018
INDUSTRY MEGA TRENDS

PROLIFERATION OF CLOUD COMPUTING

GROWTH OF AI & ANALYTICS

CLOUDIFICATION OF THE NETWORK & EDGE
DATA-CENTRIC PORTFOLIO

MOVE FASTER

INTEL® ETHERNET 800 SERIES

INTEL® OPTANE™ DC PERSISTENT MEMORY

INTEL® DC SSDs

2ND GENERATION INTEL® XEON® SCALABLE

PROCESS EVERYTHING

INTEL® XEON® D-1600

INTEL® AGILEX™ FPGA
SECOND GENERATION INTEL® XEON® SCALABLE PROCESSORS

PERFORMANCE TO PROPEL INSIGHTS

95 WORLD RECORDS AND COUNTING...

8+ SOCKETS IN A SYSTEM

UPTO 4.4 GHZ INTEL® TURBO BOOST TECHNOLOGY 2.0

UPTO 36 TB SYSTEM MEMORY IN A EIGHT SOCKET SYSTEM USING INTEL® OPTANE™ DC PERSISTENT MEMORY AND DRAM

UPTO 2X SYSTEM MEMORY CAPACITY COMPARED TO INTEL® XEON® PLATINUM 8180 PROCESSOR

UPTO DDR4 2933 MT/s & 16 Gb DIMMS

2nd Gen Intel® Xeon® Scalable Processor

95 World Records featuring Intel Xeon® processors as of September 14, 2018.
PROVIDING VALUE ON MULTIPLE VECTORS

INTEL OPTANE DC™ PERSISTENT MEMORY

BREAKTHROUGH MEMORY INNOVATION
INFRASTRUCTURE CONSOLIDATION
PERFORMANCE AND PERSISTENCE