Core Markets: Diversity with Significant Long-term Growth

Victor Peng, President and CEO
Forward-Looking Statements

During the course of this presentation, we may provide projections or other forward-looking statements regarding future events and/or future financial performance. Forward-looking statements and projections can be identified by the use of words such as “expect”, “anticipate”, “believe”, and “estimate” and specifically include, without limitation, information pertaining to Fiscal 2020 performance, longer-term revenue and profitability performance, and future market developments, such as total available or total serviceable markets. Undue reliance should not be placed on such forward-looking statements and projections, which speak only as of the date they are made. We undertake no duty to update such forward-looking statements. Actual events and results may differ materially from those in the forward looking statements and are subject to risks and uncertainties. We refer you to the documents the Company files from time to time with the Securities and Exchange Commission, specifically, the Company’s last filed Form 10-K. These documents identify important risk factors that could cause actual results to differ materially from those contained in our projections and other forward-looking statements.

Use of Non-GAAP Financial Information

This presentation contains both non-GAAP and GAAP numbers. We provide a reconciliation between non-GAAP and GAAP numbers in the appendix to this presentation, as well as on our website at investor.xilinx.com.
Our Core Markets

Strong commitment to Core Vertical Markets

Solid growth across nearly all end markets

Records set in A&D, Industrial, Automotive and Broadcast
Core Markets SAM = Solid Growth Foundation

Source: IHS & Xilinx estimates

FY20-24 CAGR

ABC SAM
11%

AIT SAM
9%

$7.8B to $11.3B over 4 years at 10% CAGR
Acquisition significantly strengthens ML inference capabilities from edge to cloud on multiple platforms.

World-class AI talent and IP

Zynq-based platforms w/ ML is compelling for Edge Apps

1: Barclays Research, Company Reports May 2018
Zynq Based Platforms a Key Growth Driver

Note: Total Xilinx Zynq Revenue

FY19 Xilinx Total Revenue

- 17% SoC
- 83% FPGA

FY19 Design Win Value

- 37% SoC
- 64% FPGA

Zynq share of total revenue is growing rapidly

FY18

- $325

FY19

- $515

58% growth
Automotive SAM and Growth Drivers

**SAM Expansion:**
ADAS
In-cabin systems
TaaS / Autonomous Driving

**Xilinx Unique Value:**
Scalability, future-proofing, and ability to differentiate

*Today:* Zynq platforms & ML
*Future:* Versal platforms & ML

Source: IHS & Xilinx Estimates

<table>
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<tr>
<th>FY20</th>
<th>FY24</th>
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<tr>
<td>$1.2B</td>
<td>$2.2B</td>
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16% CAGR

CAGR: Compound Annual Growth Rate

FY: Fiscal Year

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Zynq Scalability: From Edge to Central Module

- Forward-Looking Camera
- Driver Monitor Camera
- ADAS/AD Central Module
- Long-Range Lidar
- Surround-View Camera Front
- Short-Range Radar
FY19 Typical Content and Average Value

ADAS system (the majority of FY19 auto revenue)

- Camera Sensors (4)
- Radar Sensors (4)
- Data Aggregation, Pre-processing & Distribution Device(s) (DAPD)
- Compute Accelerator(s)
- Safety Processor(s)
- High Performance Serial Processor(s)
- Vehicle Control & Status
- HMI

FY19 Average Content - $10-15
FY24 Expanded Content in Autonomous Driving

Projected FY24 Average Content - $40-60
The Redefinition of Cars is a Multi-Billion Dollar Opportunity for Xilinx

- **ADAS**
  - 60+ millions of automotive grade units shipped for ADAS – to date

- **In-Cabin Experience**
  - MBUX Interior Assistant in Mercedes Benz GLE & CLA
  - AI-based gesture input system, powered by Zynq® UltraScale+™ MPSoC

- **Automated Driving**
  - Xilinx selected to power the ZF AI-based control unit, ProAI for automated driving
Megatrends, Growing Diverse SAM, and Share Gains Drive Sustained High Growth

- 5G: 3-4X versus 4G
- Data Center: $1B+ by FY23
- Automotive: 4X content by FY24

Core Markets SAM FY20-24 CAGR of 10%