Wired and Wireless Momentum

Liam Madden, EVP and GM
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.
Market Forces Driving Communications Growth

Forecast: Global content delivery network internet traffic 2018–2022

Exabytes Per Month

- 2018: 75
- 2019*: 104
- 2020*: 140
- 2021*: 190
- 2022*: 252

Source: Cisco Systems; ID 267184 * indicates forecast

Content explosion
Complexity of networks increasing
Security and Analytics drive more Intelligence
Multiple Drivers Expanding WWG SAM

- SAM expansion in the 5G era
- Emergence of Mobile Edge Compute and Telco DCs
- Wired network infrastructure upgrades required
- ML/AI improves security and optimizes network performance

Source: IHS & Xilinx Estimates

FY20: $5.7B, FY24: $10.4B, 16% CAGR

$5.7B

$10.4B

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Enabling End-to-End Communications Infrastructure Upgrades
Lower Cost per GB Driving Operator Deployment of 5G

5G’s wide band spectrum increases throughput (more Gb/$)

Massive-MIMO (mMIMO) makes much more efficient use of the allocated spectrum (more Gb/Hz)

Cost per GB

<table>
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<tr>
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<th>Spectrum</th>
<th>Network Equipment</th>
<th>Site Lease</th>
<th>Backhaul</th>
<th>Power</th>
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</table>

Source: Mobile Experts
Why Xilinx Wins at 5G

- Spectrum diversity
- Technology complexity

- More silicon content
- More base stations

- Global OEM footprint
- Broad product offering
Growth Driver: Spectrum Complexity

More allocated bands means more base stations

Higher spectrum frequency (which limits range) means more base stations

Source: Mobile Experts
Growth Driver: Spectrum Complexity

- Large scale events: thousands of users
- Vehicle communications: transport infrastructure
- Environmental monitor & smart cities
- Transport & infrastructure
- Improved residential connections, smart energy

Low Bands: <1GHz
Mid Bands: 1-6GHz
High Bands: >24 GHz

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Growth Driver: ~50% More Base Stations

Deployment will occur in waves

Each geography has different requirements

5G NR vs 4G Base Station Ramp

Years

5G NR BTS (Xilinx)  4G BTS (Mobile Experts)
Growth Driver: ~2x Silicon Content

(1) Xilinx Estimates
Growth Driver: More Market Share

Technology leadership across 28nm, 20nm, 16nm

Footprint in Every 5G Deployment Across the Globe

Versal Device Enabling Beamforming

Specialized and Industry Changing RFSoC Family

Potential for ~30% More Market Share in 5G for Xilinx
Xilinx Capitalizing on Massive 5G Opportunity

WWG Normalized Revenue Opportunity\(^{(1)}\)

- ~50% more Base Stations
- ~2x more Socket Content
- ~30% more Market Share

\[=\]

3 to 4X more $$ Opportunity

\(^{(1)}\) Xilinx Estimates
Problem
Software cannot keep up with line rates

Solution
Xilinx UltraScale+ with integrated HBM

Benefit
>10x gains vs. software
Case Study DOCSIS 3.1 Remote PHY

Problem
Changing specifications

Solution
Xilinx Zynq UltraScale + RFSoC with integrated DAC/ADCs

Benefit
RFSoC only device today to support deployments of DOCSIS3.1 with Full Duplex (FDX)
Problem
Much higher compute needed in radio head

Solution
Xilinx Versal AI Core Series

Benefit
4x more performance for traditional beamforming
20x more performance for ML/AI based beamforming
40% less power
Summary

3-4x Revenue Opportunity