Delivering a Generation Ahead
Investor Day 2014
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”. 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 Forms 10-K and 10-Q. 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.

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Agenda – *Delivering a Generation Ahead*

- **Market Segment Share Gains and Market Expansion**
  ~ Moshe Gavrielov, *President & CEO*

- **28/20/16nm Strategic Advantages**
  ~ Victor Peng, *SVP & GM of Products*

- **28nm Driving Growth and Market Expansion**
  ~ Krishna Rangasayee, *SVP & GM, Market Segments & Communications Business Unit*

- **Delivering Improved Returns through Technology Leadership**
  ~ Jon Olson, *SVP & CFO*

- **Q & A**

- **Reception with End Market Focus and 20nm Leadership Demo**
Delivering a Generation Ahead
Market Segment Share Gains and Market Expansion

Moshe Gavrielov
President and CEO
Delivering A Generation Ahead

28nm And Beyond

Programmable Logic Devices
Enables Programmable Logic

All Programmable Devices
Enables All Programmable & Smarter Systems
28nm Revenue Momentum

Surpassed $100M in FY13, Target >$250M in FY14

Q2 FY13 | Q3 FY13 | Q4 FY13 | Q1 FY14 | Q2 FY14 | Q3 FY14

~5%

Proto

$100M
Surpassed $100M in FY13, Target >$250M in FY14

New Target FY 2014E >>$350M
Surpassed $100M in FY13, Target >$250M in FY14

28nm Revenue Momentum

FY 2015E >$700M

Q2 FY13 Q3 FY13 Q4 FY13 Q1 FY14 Q2 FY14 Q3 FY14
28nm Market Segment Share Momentum

FY12: 50%
FY13: 60%
FY14E: ~70%

Source: Company Reports
Proven Formula: 5 Strategic Advantages at 28nm

28nm

5 ADVANTAGES
- Foundry
- Architecture
- Circuits
- Total Execution
- Software

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Proven Formula: 5 Strategic Advantages at 28nm

- First to Market
- Meeting All Specs
- Quality of Silicon
- Quality of Software
28nm: Total Execution with Superior Quality

Zero errata

< 2 ppm

Scalability

Quality of Design

Quality of Silicon

Quality of Manufacturing

Quality of Software

VIVADO

UltraFAST

All Programmable

Abstractions

4X

10X

15X
Delivering a Generation Ahead at 20nm

Xilinx Tapes-Out Industry’s First 20nm Kintex All Programmable Product
June 2013

Xilinx Ships Industry’s First 20nm Product
November 2013

Virtex UltraScale Extends Device Density Lead from 2x at 28nm to 4x at 20nm
December 2013

Xilinx 20nm All Programmable UltraScale Portfolio Now Available
December 2013

Xilinx Tapes-out First 20nm Virtex Device
December 2013

A Full Generation Ahead
Proven Formula: 5 Advantages for 20/16nm

20/16nm

Performance, Power, Integration, BOM Cost, Productivity

Total Execution

- Repeat outstanding execution and quality record of 28nm

Software

VIVADO.
SmartCORE™
UltraFAST™
All Programmable
Abstractions

Circuits

3D IC
UltraSCALE™ Architecture

Foundry

MPSoC
UltraSCALE™ Architecture

Architecture

DSP

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Proven Formula: More Share and More Growth

- More Embedded and ASSP Users
- More ASIC Displacements
- Extra Node of Value and Share
- Performance, Power, Integration, BOM Cost, Productivity
- Architecture
- Circuits
- Software

Total Execution

- Repeat outstanding execution and quality record of 28nm
Proven Formula for Share Gains

Strategic Advantages

Driving Consecutive Share Gains

- Foundry
- Architecture
- Circuits
- Total Execution
- Software


28nm

20/16nm
Accelerating Growth

4 MORE
- Growth Markets
- ASIC/ASSPs
- Users
- Products

28nm
Focus on Industry Growth Megatrends

Programmable Imperative

- Smarter Data Centers
- Smarter Vision & Connected Control
- Smarter Wireless HetNets
- Smarter Nx100G Wired Networks

More Growth Markets
Accelerating Growth From ASIC/ASSP Evolution

ASIC/ASSPs
Highest Expense, Superset Designs, Never Quite Right, Always Late

- Broad Use of Logic ASICs and ASSPs
- Differentiated SoC ASICs and ASSPs
- Very Few Multi-application Platform ASICs and ASSPs

Phase 1
90/40nm

Phase 2
28/20nm

Phase 3
28/20/16nm

All Programmable Solutions
Best TCO, Time-to-Market and Flexibility with Both Smarts and Integration
Enabling Embedded and ASSP Programmers

Abstract Programming and Smart IP for:

- Systems Engineers
- Software Engineers
- Traditional ASSP Users

More Users
Expanding the Broadest Portfolio

Concurrent Nodes with FPGAs, SoCs, and 3D ICs

- **28nm**: Long life with optimal price/performance/watt and SoC integrations
- **20nm**: Complements 28nm for new high-performance architectures
- **16nm**: Complements 20nm with FinFET multi-processing, memory
Delivering a Generation Ahead
Market Segment Share Gains and Market Expansion

5 ADVANTAGES
- Foundry
- Architecture
- Circuits
- Total Execution
- Software

4 MORE
- Growth Markets
- ASIC/ASSPs
- Users
- Products
Delivering a Generation Ahead
28/20/16nm Strategic Advantages

Victor Peng
Senior Vice President and
General Manager of Products
Goals of 20/16nm Strategic Advantages

20/16nm

- Leverage only proven foundry in every dimension
- Add extra node of value with ASIC-class 3D IC and MPSoCs
- Extend leadership in SerDes and high performance cores
- Greatly simplify programming for broader set of users
- Repeat outstanding execution and quality record of 28nm

Performance, Power, Integration, BOM Cost, Productivity

Software

Total Execution
Strategic Advantage

- Enablement and Grand Alliance
- Supply
- Services
- SoC and 3D IC
- 20nm SoC and 16nm FinFET

A Significant Strategic Advantage at 20/16nm

Leverage Only Proven Foundry in Every Dimension
TSMC: Significant Strategic Advantage at 20/16nm

TSMC: “4 out of 4”

SoC and 3D IC

Design Enablement

Process Technology

Foundry Services and Lifetime Supply

TSMC

Intel
Add an Extra Node of Value with ASIC-Class 3D ICs and MPSoCs
Building on Density Leadership Foundation

Virtex-7
VX690T
690K LCs

Competition 35%
Larger Die Size on
Similar 28nm Device

Stratix V
5SGXA7
622K LCs

Source: ChipWorks/Xilinx

8-Year Lead in Columnar Architecture, UltraScale Foundation
Building on the SoC Performance Leadership

Xilinx Seeing 30-60% Typical System Performance Advantage

SoC Architecture:
28nm Performance Benchmarks

- Software Performance
- DDR Controller Efficiency
- FPGA to DDR Bandwidth

GAP
- 12% Slower
- 53% Less
- 64% Less

Xilinx Competition
Extra Node of Value with ASIC-Class 3D ICs

Delivering a Generation Ahead

Extra Node of Value

Density and System Integration

Cost

Xilinx

Competition

UltraSCALE™ Architecture

• First ASIC-class architecture
• 2X 2nd generation 3D bandwidth
• Only proven 3D foundry source
Extra Node of Value with ASIC-Class 3D ICs

High-End Leadership

✓ Industry’s only high end portfolio
✓ Largest in the Industry by 4X
✓ Delivering at 20nm more than competitor plans at 14nm
Delivering an Extra Node of Value with MPSoCs

Heterogeneous Multi-Processing (MP)

ZYNQ®
UltraSCALE™ MP

Abstract Programming

Security & Safety

Application Processors

FPGA

ASIC-class Performance

Interconnect

System Management

Graphics/Video/Image

Real-Time Control

Waveforms/Packets

Memory

Power Management

Right Engine for the Right Tasks

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Circuit: Strategic Advantage at 20/16nm

Strategic Advantage at 20/16nm

Massive Transceiver Bandwidth

Massive Signal Processing Performance

Massive Memory Bandwidth

Extend Leadership in SerDes and High-Performance Cores
Greatly Simplify Programming for a Broader Set of Users

- Built for ASIC and SoC class designs
- Up to 15x front to back productivity gains
- Pairing with UltraFast for best practices
Co-optimizing Architecture with Software

4x Runtime Advantage

Up to 90% Utilization

Same Design

Competition

40-60% Utilization

Same Design Requires >30% Larger Device

Source – Xilinx estimates
Co-optimizing Tools With Methodology

Design Methodology

Old Design Schedule

New Design Schedule

10x Time Savings with UltraFast

✅ Best Practices Manual, Videos, Training

✅ Design Checklists

✅ Automated Enforcement
Expanding the User Base, Improving Productivity

System/Software

All Programmable Abstractions

Accelerated Development for Hardware Engineer

Enabling Software Engineers with Hardware Performance

Algorithm Deployment for Systems Engineers
Summary

Delivering a Generation Ahead

Extra Node of Value

Xilinx

Competition

Value

Cost
Delivering a Generation Ahead
28nm Driving Growth and Market Expansion

Krishna Rangasayee
SVP & GM, Market Segments & Communications Business Unit
Focus on Industry Growth Megatrends

Programmable Imperative

- Smarter Vision & Connected Control
- Smarter Data Centers
- Smarter Wireless HetNets
- Smarter Nx100G Wired Networks
### Expanding Growth Matrix with 28nm

#### More Growth Markets

<table>
<thead>
<tr>
<th>Smarter Solutions</th>
<th>More ASIC/ASSP Displacements</th>
<th>More Growth Markets</th>
<th>More Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smarter NX100G Wired Networks</td>
<td></td>
<td>Smarter Wireless HetNets</td>
<td></td>
</tr>
<tr>
<td>Smarter Wireless HetNets</td>
<td></td>
<td>Smarter Data Centers</td>
<td></td>
</tr>
<tr>
<td>Smarter Data Centers</td>
<td></td>
<td>Smarter Vision &amp; Connected Control</td>
<td></td>
</tr>
</tbody>
</table>

#### More Products

- **FPGA**
  - Smarter NX100G Wired Networks
  - Smarter Wireless HetNets
  - Smarter Data Centers
  - Smarter Vision & Connected Control

- **SoC**
  - Smarter NX100G Wired Networks
  - Smarter Wireless HetNets
  - Smarter Data Centers
  - Smarter Vision & Connected Control

- **3D IC**
  - Smarter NX100G Wired Networks
  - Smarter Wireless HetNets
  - Smarter Data Centers
  - Smarter Vision & Connected Control

**Abstract Programming**

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**FPGA SoC 3D IC**

**More ASIC/ASSP Displacements**

**More Growth Markets**

**More Users**

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## Broadest Applications with Broadest Portfolio

<table>
<thead>
<tr>
<th>Smarter NX100G Wired Networks</th>
<th>Smarter Wireless HetNets</th>
<th>Smarter Data Center</th>
<th>Smarter Vision &amp; Connected Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nx100G OTN, 400G OTN, MuxSAR</td>
<td>Top of Rack Switch, I/O Virtualization</td>
<td></td>
<td>Cable Head End Test &amp; Measurement</td>
</tr>
</tbody>
</table>
**Communications and Data Center SAM CY2017**

**Communications and Data Center**

<table>
<thead>
<tr>
<th>Category</th>
<th>SAM</th>
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</thead>
<tbody>
<tr>
<td>Wireless Communications</td>
<td>$2.4B</td>
</tr>
<tr>
<td>Wired Communications</td>
<td>$4.4B</td>
</tr>
<tr>
<td>Data Center</td>
<td>$2.2B</td>
</tr>
</tbody>
</table>

**Source** – Xilinx estimates
The Wind Behind Our Sails in Communications

Strong CAPEX Spend Projected

ASIC/ASSP ROI Challenge

Telecom Crash | Investment Cycle | Financial Crisis | New Invest Cycle

Source: Infonetics


Design Starts (First Five Years)

Source: IBS

65nm | 40nm | 28nm | 20nm

Renewed Investment in Wired and Wireless; Incumbent ASIC/ASSPs Challenged

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Wireless Market Growth Opportunities

More Market Growth
- Video Drives Mobile Traffic and LTE Deployments
- LTE Deployments in Early Stage: 25% to Date

More Products
- **Kintex Mid-Range**: De-facto Wireless FPGA
- **Zynq SoC**: Highest Integration Radio Solution

More ASIC/ASSPs
- Displacing ASICs in Next Generation Radio
- Displacing ASSPs in Backhaul
Why Xilinx in Wireless at 28nm

Performance, Power, Integration, BOM Cost, Productivity

- Best Low/Mid Range
- Leading Radio SoC
- >30% Power/Performance/Watt Advantage

Circuits
- 12 Gbps SerDes
- 491 MHz DSP Performance

Software
- Vivado HLS
- SmartCORE Radio IP

Foundry
- ASIC/ASSP

Total Execution
First to Market and Production Without Errata – Kintex & Zynq
Market Success with 28nm in Wireless Comms

- #1 Wireless Infrastructure Logic IC supplier
- Best LTE footprint in industry
- 80% design win rate at 28nm vs. FPGAs
- 1/3 of 28nm design wins vs. ASICs/ASSPs

Xilinx 28nm Design Wins Drive Revenue Growth for Next 5 Years
Wired & Data Center Market Growth Opportunities

More Market Growth
- Bandwidth Needs Drives Growth in OTN, Metro, & Access
- Cloud and SDN Breaks Traditional Network Architectures

More Products
- **Virtex-7**: Leadership Across All Wired Comms/Data Center
- **Virtex 3D IC** for OTN 4x100G; ToR switches; NIC

More ASIC/ASSPs
- Displacing Nx100G Traffic Manager/Framer/Mapper ASSPs
- Displacing ASIC/ASSP SSD Controllers and GPUs in HPC
Why Xilinx in Wired and Data Center at 28nm

- Foundry: Virtex/Zynq Security, NX100G Performance
- Architecture: >30% Power Advantage, >15% Performance Advantage
- Circuits: 13G SerDes with Adaptive Eq., 10G Backplane Support
- Software: Highest QoR, SmartCORE IP, Vivado HLS, OpenCL
- Total Execution: Highest Quality, Time to Production with Virtex, Industry Pioneer in 3D IC

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Market Success with 28nm in Wired & Data Center

Leadership in enterprise, data center, access and service provider markets

70% design win rate at 28nm vs. FPGAs

1/3 of 28nm design wins vs. ASICs/ASSPs

Xilinx 28nm Design Wins Drive Revenue Growth for Next 5 Years
ASIC/ASSP Displacements in Communications

Customer A 80%

Customer B 35%

Customer C 30%

Customer D 20%

28nm Driving Market Expansion at Major Accounts Displacing ASICs & ASSPs
## Logic IC Ranking at Top 10 Comms Customers

<table>
<thead>
<tr>
<th>Customer</th>
<th>3 Years Ago</th>
<th>Today</th>
<th>3 Years Later</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer A</td>
<td>#5</td>
<td>#3</td>
<td>#1</td>
</tr>
<tr>
<td>Customer B</td>
<td>#5</td>
<td>#2</td>
<td>#2</td>
</tr>
<tr>
<td>Customer C</td>
<td>#6</td>
<td>#5</td>
<td>#2</td>
</tr>
<tr>
<td>Customer D</td>
<td>#7</td>
<td>#5</td>
<td>#2</td>
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<tr>
<td>Customer E</td>
<td>#7</td>
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<tr>
<td>Customer F</td>
<td>#1</td>
<td>#3</td>
<td>#3</td>
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<tr>
<td>Customer G</td>
<td>#5</td>
<td>#4</td>
<td>#3</td>
</tr>
<tr>
<td>Customer H</td>
<td>#5</td>
<td>#4</td>
<td>#3</td>
</tr>
<tr>
<td>Customer I</td>
<td>&gt;#10</td>
<td>#7</td>
<td>#3</td>
</tr>
<tr>
<td>Customer J</td>
<td>#6</td>
<td>#5</td>
<td>#3</td>
</tr>
</tbody>
</table>

Displacing ASICs, ASSPs, Processors, and DSPs
Market Segments SAM CY2017

Market Segments
Market Expansion Opportunity Fueled by 28nm Success

Test and Measurement  $0.5B  
ISM  $2.0B  
Aerospace and Defense  $2.3B  
Consumer  $1.0B  
Broadcast  $1.5B  
Auto  $0.7B

Source – Xilinx estimates
Smarter Vision and Connected Control
Market Growth Opportunities

More Market Growth
- Real-time Video Analytics – Improved Safety and Security
- 4K UHD: Driving Broadcast and Consumer Growth

More Products
- Zynq SoC for Advanced Driver Assist Systems
- Artix & Kintex FPGAs for ISM and A&D

More ASIC/ASSPs
- Displacing ASSPs in Driver Assistance
- Displacing Processors in Industrial Factory Automation
Why Xilinx in Smarter Vision & Connected Control

- **Foundry**
  - ZYNQ
  - ARTIX-7
  - No ASIC/ASSP

- **Architecture**
  - SoC Enables Real-time Processing and Analytics
  - >30% Power Advantage

- **Circuits**
  - ARM Sub-system
  - Leading I/O Connectivity

- **Software**
  - Vivado HLS, OpenCV
  - IP Integrator
  - SmartCORE IP

**Total Execution**
- First To Market SoC with Highest Quality

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Market Success with 28nm in Market Segments

- Multiple multi-generation industrial automation platforms with Zynq
- >2/3rd of advanced driver assistance platforms based on Zynq
- Only 28nm defense-grade FPGAs and SoCs further strengthen A&D leadership

Xilinx 28nm Design Wins Drive Revenue Growth for Next 5 Years
Proven Formula: 5 Strategic Advantages at 28nm

- Foundry
- Architecture
- Circuits
- Total Execution
- Software

28nm
28nm Driving Higher Value

Top 50 Design Wins Value (E) >2x

Source – Xilinx
UltraScale: ASIC Class Advantage for Smarter Systems

Current Generation | Next Generation | Future Requirements

7 Series

- Smarter
  - Nx100G Wired Networks and Data Center
  - 100Gbps
  - 400Gbps

UltraSCALE™ Architecture

- 1Tbps
- 8K/4K
- LTE Advanced
- NxN LTE Advanced

Next Generation

- Smarter
  - Vision and Connected Control
  - 1080P
  - 4K/2K

Future Requirements

- Massive Packet Processing
  - 1 Tbps wire-speed
- Massive Data Flow, I/O and Memory Bandwidth
  - > 5Tbps
- Massive DSP Performance
  - > 8 TMACs

First at 28 & 20nm, 4+ Months Ahead with Silicon
Driving Leadership Across All Markets

Deliver on 8-12% CAGR
- Driven by Megatrends and Programmable Imperative

Drive PLD Leadership
- 70% at 28nm and >$700M in FY15E

Drive Logic IC Leadership
- Grow Market Share vs. ASICs/ASSPs/DSPs/MPUs

Leveraging Xilinx Strengths to Win vs. ASIC/ASSPs
Delivering Improved Returns through Technology Leadership

Jon Olson
Senior VP and CFO
Why PLDs Will Outperform Semi Market

Programmable Imperative Strengthening

ALL PROGRAMMABLE™
Market Penetration Expanding Rapidly with Each Generation

End Market Growth Continues to Improve
Xilinx Leadership at 28nm and 20/16nm

Positioned to Capitalize on Industry Megatrends
- Key player in WW LTE deployments and Nx100G wired infrastructure
- Core position in driver assist, machine vision, surveillance, displays

Monetizing SAM expansion
- Exceptional 28nm growth with more products
- Significant value enabling more ASIC/ASSP displacements
New Product Sales Driving Growth

New Product CAGR FY12 – FY14E: >80%

Source: Xilinx
28nm: Industry’s Most Successful Node

Higher quarterly peak and longer life than previous node

Normalized to quarter of first revenue

$100M/qtr
3 Years

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End Market Growth Drivers FY13 – FY16E

Communications
- Multi-year global TD/FD-LTE wireless rollout expanding Xilinx leadership
- NX100G line cards (core, metro, enterprise, and data center) + access

Industrial and A&D
- Industrial automation, machine vision, and surveillance drive growth
- A&D adoption at 28nm outstanding; military grade is a differentiator

Broadcast, Consumer and Automotive
- 4K2K UHD driving upgrades across video chain from AVB to consumer
- Zynq leading the driver assistance revolution
## Projected Growth

<table>
<thead>
<tr>
<th>Segment</th>
<th>FY13 – FY16E CAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications and Data Center</td>
<td>9% - 13%</td>
</tr>
<tr>
<td>Industrial and A&amp;D</td>
<td>7% - 11%</td>
</tr>
<tr>
<td>Broadcast, Consumer, and Automotive</td>
<td>6% - 10%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>8% - 12%</strong></td>
</tr>
</tbody>
</table>
Progress in Delivering 8 – 12% Growth Rate

Revenue

- FY13: $2.2B
- FY14E: 8% growth
- FY15E: $3.0B
- FY16E: 12% growth

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Financial Guidance
FY15E: Positioned for Growth

Macro Environment
- Fundamentals improving
- Infrastructure spending in primary markets

Xilinx - Specific
- Three consecutive years of PLD market share gains
- “New products” positioned for accelerated growth
Gross Margin Trend

- All time high @ 69% driven by price and cost execution
- Pricing strategies and better discipline paying off
- Cost focus on ramping new products AND driving volume products
Creating Operating Leverage

FY14E Operating Margin >30%
- Estimated 10% revenue growth over FY13
- Significant gross margin expansion and spending discipline

FY15E Expectations
- Maintain intense focus on gross margin
- Operating expense growth of ~6%

FY15E Top Line Growth Expectations Outpace Spending Growth
## Financial Guidance

<table>
<thead>
<tr>
<th>FY15E</th>
<th>~68-70%</th>
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<tbody>
<tr>
<td>Gross Margin</td>
<td>~$530 - $550M</td>
</tr>
<tr>
<td>R&amp;D</td>
<td>~$380 - $400M</td>
</tr>
<tr>
<td>Amortization of Intangibles</td>
<td>~$10M</td>
</tr>
<tr>
<td>Other Income</td>
<td>~(34M)</td>
</tr>
<tr>
<td>Tax Rate</td>
<td>13 - 14%</td>
</tr>
<tr>
<td>Capex</td>
<td>$30 - $35M</td>
</tr>
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</table>
Commitment to Dividend

Today’s Announcement
- Dividend Increase of 16% or $0.04/Share
- Continuous Commitment to Shareholder Return

<table>
<thead>
<tr>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14E</th>
<th>FY15E</th>
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<tbody>
<tr>
<td>$300M</td>
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Model Continues to Drive Strong Cash Flow

<table>
<thead>
<tr>
<th></th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating Cash Flow</td>
<td>$1000</td>
<td>$800</td>
<td>$650</td>
<td>$400</td>
<td>$200</td>
</tr>
<tr>
<td>Cash Returned to Shareholders</td>
<td>$0</td>
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Delivering a Generation Ahead

Xilinx has All Five Elements for Technology Leadership

All Programmable Devices Expand Portfolio and Markets

Accelerated Monetization of SAM Expansion

Delivering Improved Returns Through Technology Leadership
Q & A

5 ADVANTAGES
- Foundry
- Architecture
- Circuits
- Total Execution
- Software

4 MORE
- Growth Markets
- ASIC/ASSPs
- Users
- Products