GAMING

Jeff Fisher, Sr. VP GeForce
WORLD LEADER IN PC GAMING

GAMING REVENUE

5 YR CAGR

GLOBAL FOOTPRINT

#1

GPU on Steam - Valve
GPU in iCafe - Shunwang
GPU in Pro Esports - ESL
GPU in VR - Oculus Ref Systems

2015 Mercury Research / Desktop, NVIDIA
PRODUCTION VALUE OF CONTENT INCREASING

CONSOLE PERF IS NEW BASELINE

<table>
<thead>
<tr>
<th>PS4</th>
<th>1080P</th>
<th>60FPS</th>
<th>$199</th>
</tr>
</thead>
<tbody>
<tr>
<td>Xbox One</td>
<td></td>
<td></td>
<td>GEFORCE GTX 960</td>
</tr>
</tbody>
</table>

DEVELOPER RECOMMENDED GPU

GEFORCE GTX 960+

Source: IDC, UN, NVIDIA, CD Project, Square Enix, Bethesda, Rock*
GROWING OPPORTUNITY

EMERGING MARKET OPPORTUNITY

18-40 Yr POPULATION

- Developed
- Emerging

2.8B

Broadband Growth
- 5%

GEFORCE Units CAGR
- 5%

GEFORCE ASP CAGR
- 10%

GEFORCE % of Pop
- 20%

17%

11%

15%

2%

70% of IB ON OLDER GPUs

Maxwell

Older

Source: IDC, UN, NVIDIA, NewZoo 2015, Growth In CAGR
ESPORTS: NEW GENERATION OF GAMERS

ESPORTS INSPIRING NEW GAMERS

MOBA GAMERS

<table>
<thead>
<tr>
<th>Year</th>
<th>2014</th>
<th>2016</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>60M</td>
<td>90M</td>
<td>120M</td>
</tr>
</tbody>
</table>

ENGAGED ESPORTS AUDIENCE

ESPORTS AUDIENCE

<table>
<thead>
<tr>
<th>Region</th>
<th>2015</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROW</td>
<td>100M</td>
<td>120M</td>
</tr>
<tr>
<td>APAC</td>
<td>50M</td>
<td>70M</td>
</tr>
<tr>
<td>NA</td>
<td>30M</td>
<td>35M</td>
</tr>
<tr>
<td>EU</td>
<td>10M</td>
<td>20M</td>
</tr>
</tbody>
</table>

Source: DFC, NVIDIA, NewZoo 2015
GAMER CREATED CONTENT

GAME MODS

VIDEO

PHOTOGRAPHY

Source: NEXUSMods
VR: ALL NEW EXPERIENCES

MANY USE CASES
- GAMING
- PROFESSIONAL
- ENTERTAINMENT

VR OPPORTUNITY
- 2016: 0M
- 2017: 4M
- 2018: 8M
- 2019: 16M
- 2020: 32M

GPU INTENSIVE
- VR NEXT
  - 7x
- 20x

Source: BI Intelligence, NVIDIA
THANK YOU

JOIN THE CONVERSATION

#GTC16