



Americas Summit

NOVEMBER 28, 2012

QUALCOMM®



Anand Chandrasekher



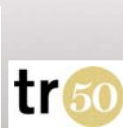


Fortune 500 Company

25+ years of driving the evolution of wireless

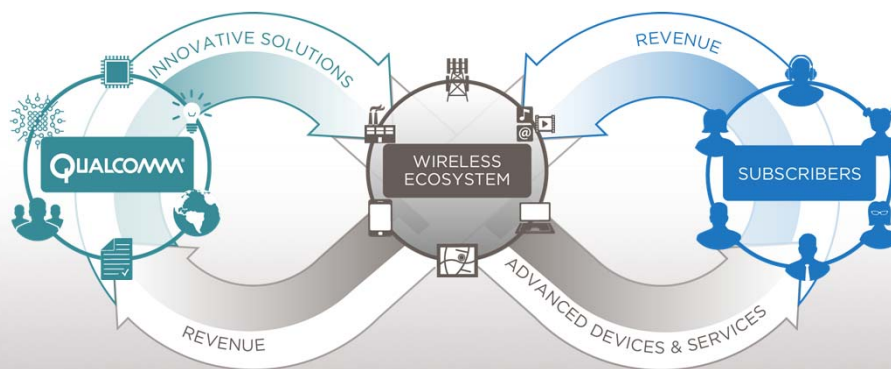
Making wireless more personal, affordable and accessible to people everywhere

World's largest fabless semiconductor company, #1 in wireless



Qualcomm's Unique Business Model

A Technology Enabler for the Entire Mobile Value Chain



4

Qualcomm: A Communications Systems Company

Innovation Across Entire Wireless Value Chain



Innovative
Technologies



Standardization



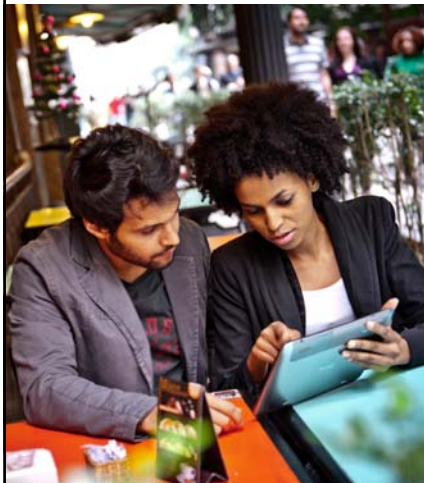
Productization



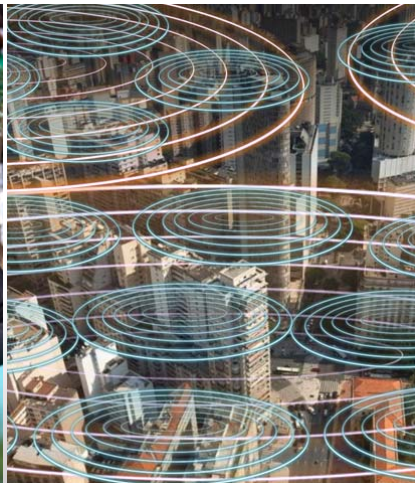
Commercialization

5

Key Industry Trends



Computing Redefined



Unprecedented
Data Demand



Digital 6th Sense

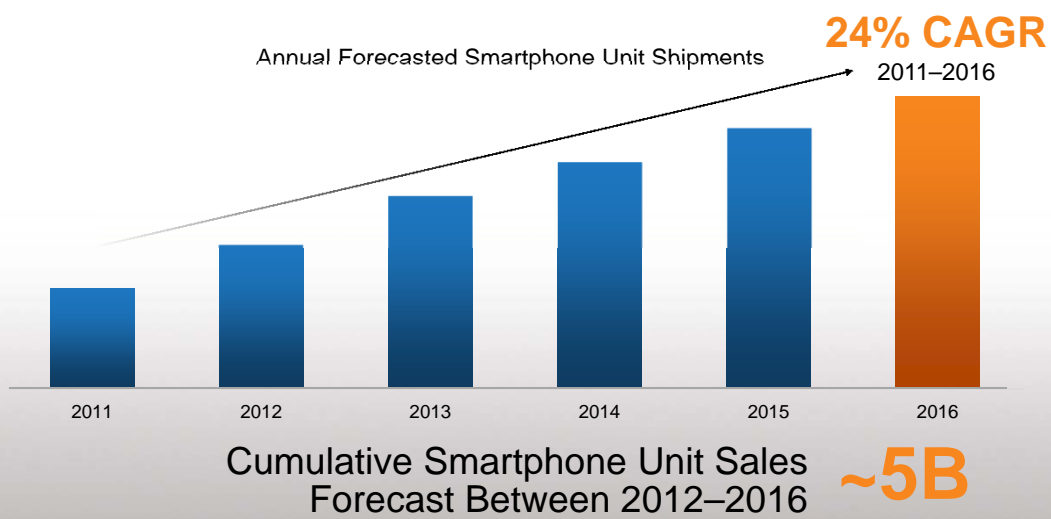
6



Computing Redefined

Continued Smartphone Momentum

Displacing Feature Phones



Source: Average of Gartner, Oct. '12; Strategy Analytics, Aug. '12

8

Our Most Important Device

Immediacy, Portability, Connectedness



1/3+

of daily media interactions
occur on a smartphone

4/5

of all searches on a smartphone
are spontaneous, compared to
52% on PC

~1/2

of smartphone owners use
them while watching TV

Source: Google/Sterling Brands/Ipsos Multi-Screen Research, Aug. '12

9

Mobile is Redefining Computing

High Performance Computing

- ▶ High Resolution Screens
- ▶ Responsive Devices
- ▶ Fast, Always-On Connectivity
- ▶ Rich Multimedia Experience



Without Compromising Mobility

- ▶ Sleek, Ultra-light
- ▶ Longer Battery Life
- ▶ Thermal Efficiency

10

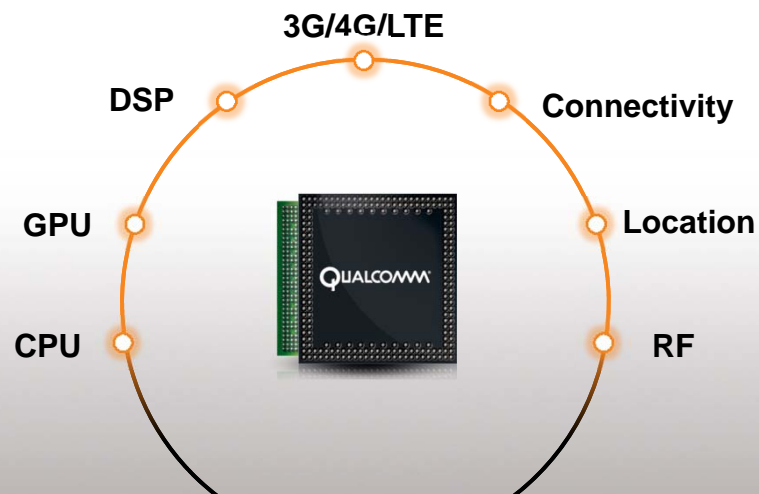
Snapdragon Across a Range of Devices



11

Qualcomm Approach: Own the Key Technology Blocks

Unmatched Portfolio



12

Successful Investments Have Resulted in Leadership

#1

Application
Processor

#1

Graphics
Processor

#1

Digital Signal
Processor

#1

3G/4G/LTE

#1

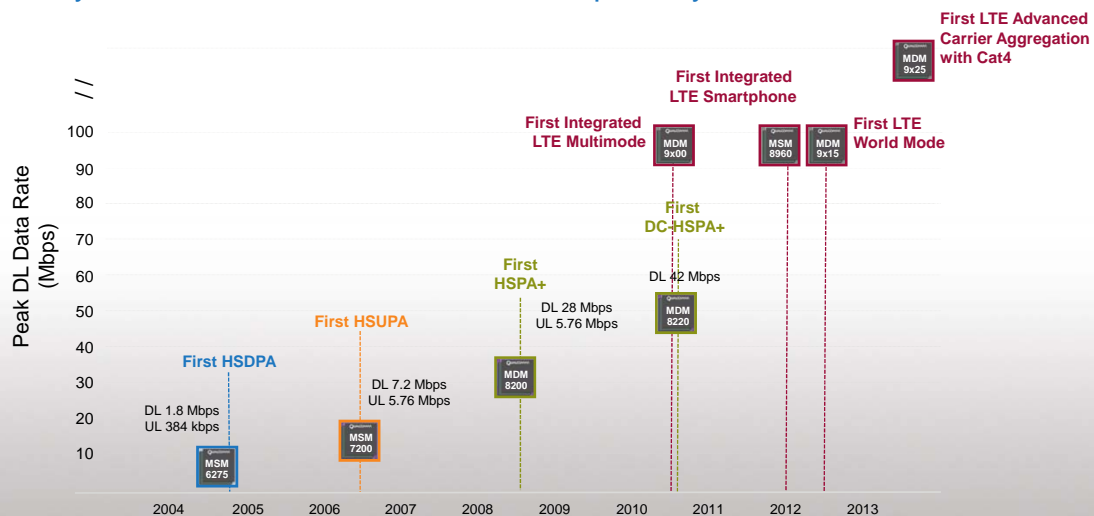
RF

Sources: Mobile AP Unit Shipment - Strategy Analytics; GPU Shipment - Jon Peddie Research; DSP shipment - Forward Concepts; 3G/4G/LTE - Strategy Analytics; RF iSuppli, Q1'12

13

Qualcomm Modem Technology Leadership

A History Of Time-To-Market and Product Superiority

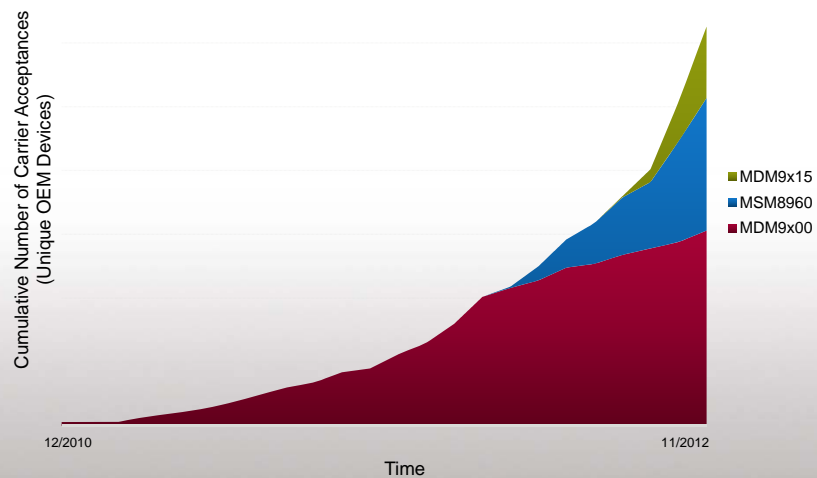


14

Qualcomm LTE Leadership and Scale

First and Second Generation Gobi LTE Launch Velocity

550+
LTE OEM Device
Acceptances on
Qualcomm LTE chips

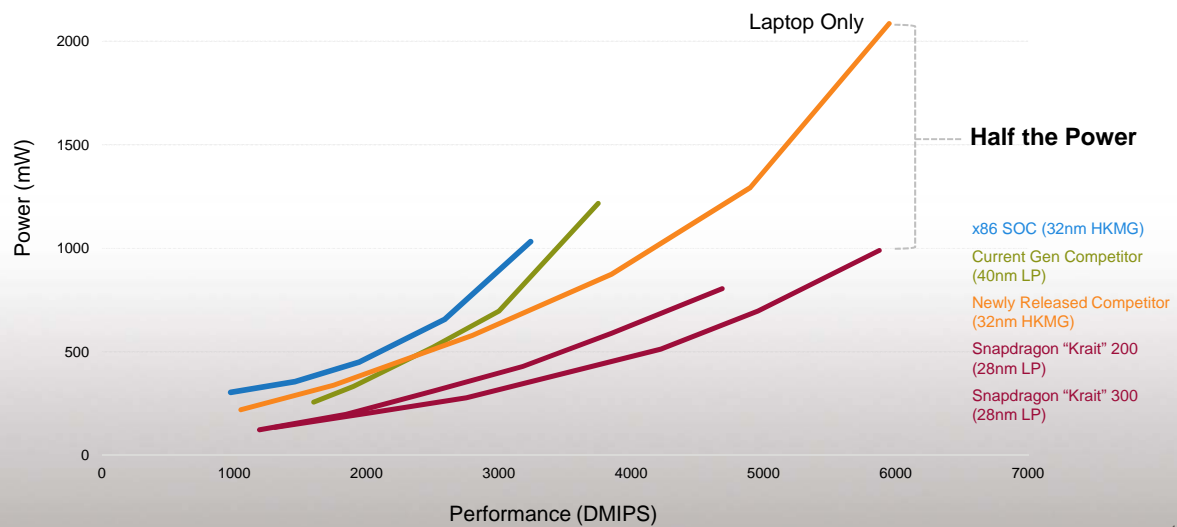


Nov. '12 CAs shown are projected, based on documented OEM products in development; all other figures are actual/historical CAs

15

CPU Leadership Now and into Next Generation

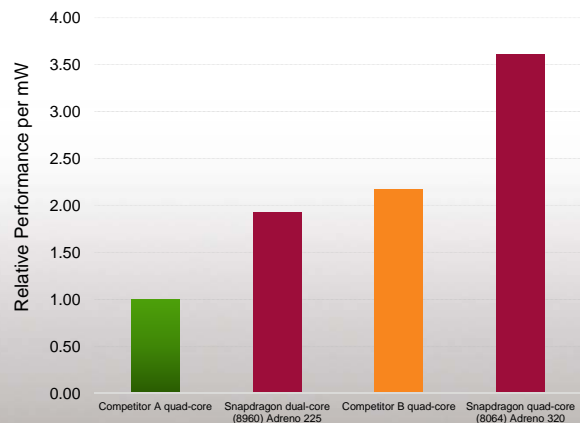
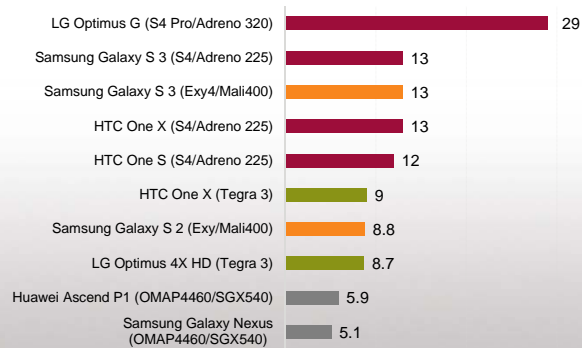
Highest Performance at the Lowest Power



Adreno 320 GPU Leads in Power-Efficient Performance

Latest GPU Architecture — Higher Performance, Lower Power

GLBenchmark 2.5—Egypt HD (Offscreen 1080p)
Frames per Second—Higher Is Better



Sources: AnandTech '12, Qualcomm data

17

Qualcomm Maturing Turnkey Model

Investing for Growth



Superior
Technology

Competitive
Price

Complete
Reference
Design

Ecosystem,
Channel
Support

Brand

40+
OEMs

100+
Launches

100+
in Design

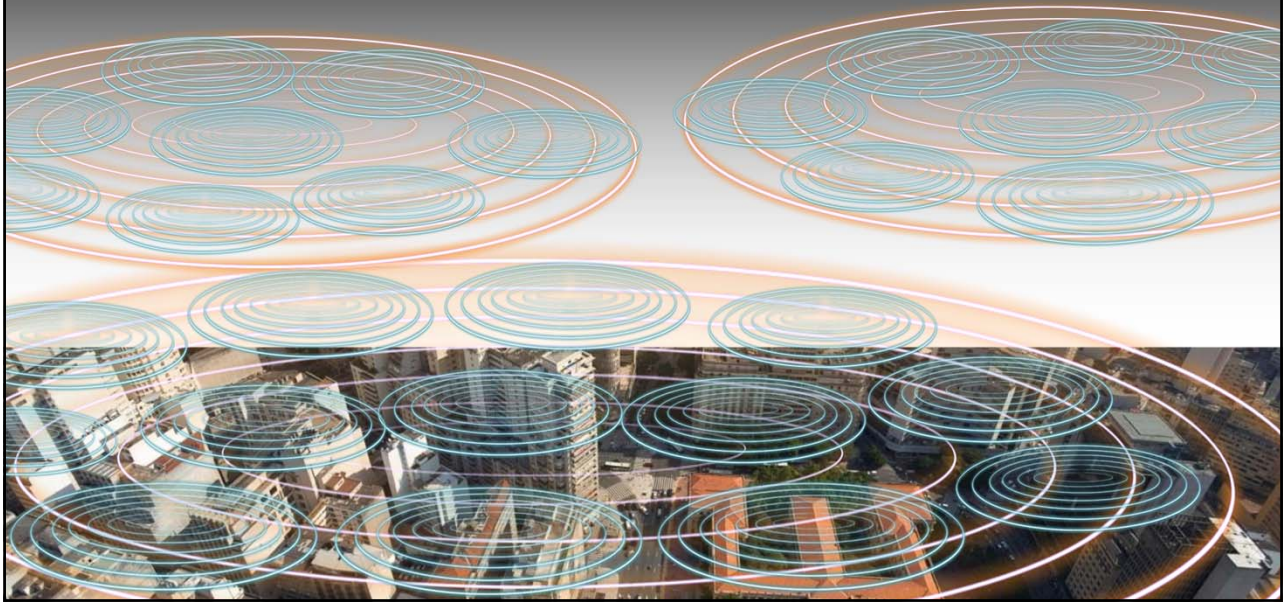
<60 Days
Launch Time-to-Market

18



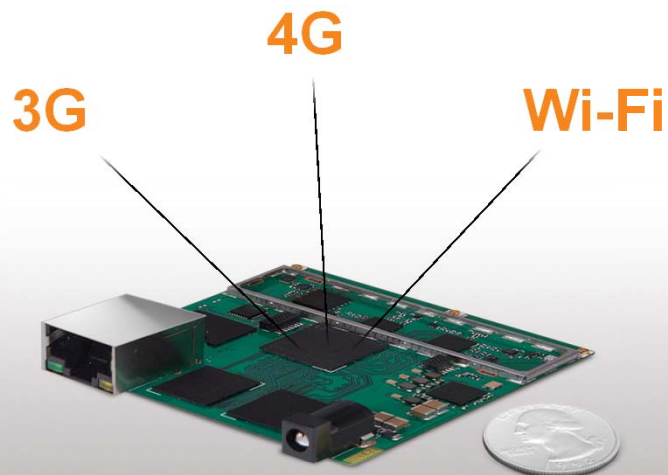
Enabling 1000x Capacity

Demand Driving Extreme Densification



Small Cells Everywhere

Low Cost, Small Size and Ease of Deployment



21

Digital 6th Sense



Internet of Everything

Everything Around us Is Becoming Intelligent and Connected



24

Thank You

© 2012 Qualcomm Technologies, Inc. All rights reserved. Qualcomm, Snapdragon, Trepp, and Gobi are trademarks of Qualcomm Incorporated, registered in the United States and other countries. Trademarks of Qualcomm Incorporated are used with permission. AllJoyn is a trademark of Qualcomm Innovation Center, Inc., registered in the United States and other countries. Other products and brand names may be trademarks or registered trademarks of their respective owners.

Qualcomm Technologies, Inc
5775 Morehouse Drive
San Diego, CA 92121-1714