Qualcomm press conference

Cristiano Amon
President, Qualcomm Incorporated

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Barcelona, Spain
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President, Qualcomm Incorporated
In addition to the historical information contained herein, this presentation and the conference call that accompanies it contain forward-looking statements that are inherently subject to risks and uncertainties, including but not limited to statements regarding our strategy for continued growth; the size of our future serviceable addressable opportunities; leading the industry to 5G; our being well positioned with our product and technology leadership to continue our expansion into new product categories; our business, product and technology strategies; business and growth opportunities and priorities, including 5G, RF front end and adjacent businesses such as automotive, IoT, security, networking and datacenter, and our investments therein and positioning to take advantage of opportunities in these areas; our technologies and technology leadership, products and product leadership, and product roadmap; and our business trends, as well as industry trends and their potential impact on our business, and our positioning to take advantage thereof. Forward-looking statements are generally identified by words such as “estimates,” “guidance,” “expects,” “anticipates,” “intends,” “plans,” “believes,” “seeks” and similar expressions. Actual results may differ materially from those referred to in the forward-looking statements due to a number of important factors, including but not limited to risks associated with the disruptive takeover proposal to which we are subject; our proposed acquisition of NXP; commercial network deployments, expansions and upgrades of CDMA, OFDMA and other communications technologies, our customers’ and licensees’ sales of products and services based on these technologies, and our customers’ demand for our products and services; competition in an environment of rapid technological change; our dependence on a small number of customers and licensees; our dependence on the premium-tier device segment; attacks on our licensing business model, including current and future legal proceedings and governmental investigations and proceedings, or actions of quasi-governmental bodies or standards or industry organizations; potential changes in our patent licensing practices, whether due to governmental investigations, private legal proceedings challenging those practices, or otherwise; the enforcement and protection of our intellectual property rights; our ability to extend our technologies, products and services into new and expanded product areas and adjacent industry segments; risks associated with operation and control of manufacturing facilities acquired through the formation of our joint venture, RF360 Holdings; the continued and future success of our licensing programs, which requires us to continue to evolve our patent portfolio, and which may be impacted by the proliferation of devices in new industry segments such as automotive and IoT, and the need to extend license agreements that are expiring; our dependence on a limited number of third-party suppliers; claims by third parties that we infringe their intellectual property; strategic acquisitions, transactions and investments; our cost reduction plan; our compliance with laws, regulations, policies and standards; our use of open source software; our stock price and earnings volatility; our indebtedness; our ability to attract and retain qualified employees; foreign currency fluctuations; and failures in our products or services or in the products or services of our customers or licensees, including those resulting from security vulnerabilities, defects or errors. These and other risks are set forth in our Quarterly Report on Form 10-Q for the fiscal quarter ended December 24, 2017 filed with the SEC. Our reports filed with the SEC are available on our website at www.qualcomm.com. We undertake no obligation to update, or continue to provide information with respect to, any forward-looking statement or risk factor, whether as a result of new information, future events or otherwise.

We refer to “Qualcomm” for ease of reference. However, in connection with our October 2012 reorganization, Qualcomm Incorporated continues to operate QTL and own the vast majority of our patent portfolio, while Qualcomm Technologies, Inc., its wholly-owned subsidiary, now operates, along with its subsidiaries, substantially all of our products and services businesses, including QCT, and substantially all of our research and development functions.
A strategy for continued growth
Extending the reach of mobile technology

Serviceable addressable opportunity in 2020

Core mobile
$32 Billion

RF Front End
$20 Billion

Datacenter
$19 Billion

Mobile compute
$7 Billion

Networking
$11 Billion

IoT and security
$43 Billion

Automotive
$16 Billion

Source: combination of third party and internal estimates. Includes SAM for pending NXP acquisition. Note: SAM excludes QTL.
Making 5G NR a commercial reality in 2019

18 Operators
20 OEMs

Qualcomm Snapdragon is a product of Qualcomm Technologies, Inc. and/or its subsidiaries.
Industry-first evaluation of real world performance reveals immense 5G user experience gains over 4G

Frankfurt
5G NR multimode
3.5GHz (sub-6GHz)

- 5x increase in capacity
- >490 Mbps median browsing speed
- ~7x faster responsiveness

San Francisco
5G NR multimode
28GHz mmWave

- 5x increase in capacity
- 1.4 Gbps median browsing speed
- ~23x faster responsiveness

Source: Company data and internal analysis
Frankfurt: 3.5 GHz 5G NR + Gigabit LTE multimode vs. Gigabit LTE • San Francisco: 28 GHz 5G NR + Gigabit LTE multimode vs. Gigabit LTE

Median streaming video quality
8K at 120 FPS with 10-bit color and beyond
from 2K at 30 FPS with 8-bit color for LTE users
Highly integrated, turn-key 5G modules to accelerate deployments and lower barriers to entry

Sampling expected in 2019

Snapdragon

5G Module Solutions

Empowering the 5G ecosystem to scale

* Compared to designs using discrete components.
World’s first announced 2 Gbps LTE modem

World’s first announced 7nm chip

World’s first announced 14nm RF chip

World’s first announced 7x carrier aggregation

Strengthening the Gigabit LTE foundation of 5G NR multimode networks
Qualcomm Snapdragon 845 mobile platform

- 2nd gen Gigabit LTE
- New architectures for AI and immersive experiences

Samsung Galaxy S9/S9+
Sony Xperia XZ2
New architectures for AI, power, and performance

- Mix of premium and practical features
- Ultra-high quality user experiences
- Premium tech in more affordable devices, sooner
- Designed to meet consumer demands

2X AI performance*  
+30% Power efficiency*

* Compared to the Qualcomm Snapdragon 660 Mobile Platform.

Commercial sampling expected in 1H 2018
Qualcomm®
RF Front End

Qualcomm RF Front End is a product of Qualcomm Technologies, Inc. and/or its subsidiaries.
Continued
RF Front End
momentum

Strong traction for rich
portfolio of unique
modem-to-antenna
solutions
Qualcomm Technologies leading connectivity and RFFE

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SAW and BAW technologies driving premium designs

Key building block for duplexer evolution to Gigabit

Qualcomm Technologies BAW and SAW competitive to FBAR in mid and high bands

Source: Qualcomm Technologies lab testing; example based on B66 Tx path of quadplexer
First to announce RF Front End Hexaplexer with SAW & BAW
Optimized carrier aggregation solution

Addressing growing complexity
and accelerating time to commercialization

Source for performance data: Qualcomm Technologies lab testing; North American carrier aggregation examples using bands 66, 25, and 30 (Tx/Rx)
Multimode 3G/4G/5G poses immense challenge

End-to-end approach needed to address growing complexity

Qualcomm Technologies end-to-end system uniquely positions us to lead in 5G multimode RFFE

Next gen end-to-end system dynamically tunes RFFE performance using modem intelligence and network information
Transforming new industries
Always Connected PC*
Up to Gigabit LTE today, with 5G in 2019

Making the Always Connected PC a reality

 Operators

Retailers

* Requires network connection and will support up to 20 hours of battery life
Qualcomm® Mesh Networking is redefining the industry

#1 Retail mesh networking

ASUS  belkin  D-Link  eero  Google  LINKSYS  NETGEAR  SAMSUNG  tp-link  UBIQUITI  and others...
Industry’s first integrated 2x2 802.11ax-ready client device solution
Qualcomm Technologies WCN3998 solution, sampling expected in Q2 2018

- **Up to 2X capacity**¹
- **Up to 67% reduction in power consumption**²
- **1st to support WPA3 security protocol**
- Advanced Bluetooth with audiophile-quality features

¹ Compared to devices supporting only 4x4 sounding
² Compared to previous generation 11ac Wave-2

Highly integrated solution designed to deliver unparalleled performance, security, and time-to-commercialization advantages
Q&A