Except for the historical information contained herein, certain matters in this presentation including, but not limited to, statements as to: PC gaming getting stronger; PC gamers growing from a new base; GeForce extending growth; our markets and market opportunities; ray tracing and AI transforming gaming; AI bringing more productivity and new experiences to gaming; and the benefits, impact, and performance of our products and technologies are forward-looking statements. These forward-looking statements and any other forward-looking statements that go beyond historical facts that are made in this presentation are subject to risks and uncertainties that may cause actual results to differ materially. Important factors that could cause actual results to differ materially include: global economic conditions; our reliance on third parties to manufacture, assemble, package and test our products; the impact of technological development and competition; development of new products and technologies or enhancements to our existing product and technologies; market acceptance of our products or our partners’ products; design, manufacturing or software defects; changes in consumer preferences and demands; changes in industry standards and interfaces; unexpected loss of performance of our products or technologies when integrated into systems and other factors.

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PC Gaming is Strong, Getting Stronger

PC Gamers — Growing from a New Base
Source: Newzoo

2X Concurrent Steam Gamers
Source: SteamDB

1.4X GeForce Gaming Sell Thru
Source: Gartner, NVIDIA
GeForce Extends Growth, Large Upgrade Opportunity

More Gamers, Richer Mix

Installed Base Needs Upgrade

Ada: 3x Turing Ramp at $699+

Source: NVIDIA estimates
GeForce RTX — Ray Tracing & AI Transform Gaming

- Battlefield V: 39 Ray Tracing Operations / Pixel
- Cyberpunk 2077: 635 Ray Tracing Operations / Pixel

Timeline:
- 2018
- 2020
- 2023

Graph:
- # OF TRANSISTORS
- RAY TRACING OPERATIONS / PIXEL

Technologies:
- Full Raytracing
- Tensor Cores
- DLSS
Accelerated AI — Game Changer for All Apps

Microsoft Build — May 23, 2023

Accelerated AI for All Apps

Huge Installed Base for Range of Apps

AI Brings New Experiences to Gaming

Source: NVIDIA