



Qualcomm

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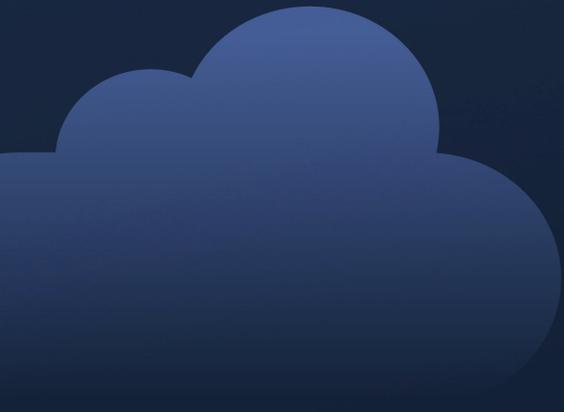
@cristianoamon

Enabling a world where
everyone and everything
can be intelligently
connected





Qualcomm brings data processing and intelligence
to the edge, enabling cloud-edge convergence



Connected intelligent edge

Always-on cloud connectivity

Heterogeneous and
efficient computing

Scalable distributed intelligence



Connected
intelligent edge

~\$700B

Addressable market¹
in the next decade

Mobile Auto IoT

1. TAM: Total addressable opportunity as of November 16, 2021. A combination of internal and third-party estimates

One Technology Roadmap

Leading technologies to scale across virtually every device

Everything wireless

High performance, low power

Edge intelligence

Handsets



Automotive



Consumer IoT



Industrial IoT



IoT Edge Networking



Industry-leading wireless connectivity



5G

World's fastest peak speeds up to 10 Gbps download and 3.5 Gbps upload
mmWave download latency 10X lower than 4G



Wi-Fi

Speeds up to 5.8 Gbps
World's first to support HBS¹ multi-link for global Wi-Fi 7 performance
Leading global Wi-Fi shipments (by volume)²



Bluetooth[®]

First announced audio codec for lossless music streaming over Bluetooth
Pioneered dual Bluetooth for superior performance and reliability



GNSS/Location

Leader in combined GNSS shipments across mobile, automotive and IoT²
Supporting all GNSS constellations; 130+ satellites³

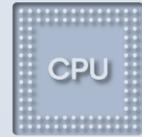


C-V2X

First commercial C-V2X chipset
Commercial deployments underway in China; initial deployments underway in US

1. HBS = high band simultaneous; 2. ABI Research: Wireless Connectivity Technology Segmentation and Addressable Markets (August 2022), #1 in location based on GNSS chipset units shipped; 3. GPS, GLONASS, Galileo, IRNSS, Beidou, and QZSS

A leader in high-performance, low-power systems



CPU

Leadership in sustained performance and battery life¹
Next-gen CPU designed to set the performance benchmark



GPU

Leading performance per watt¹
Multi-display support
Desktop-like performance



Camera

Always-sensing ISP
Leading DXOMARK ratings²
24-bit HDR,
multi-camera concurrency



Computer Vision

Dense optical flow
Analytics-based ISP



Multimedia

8K HDR video playback
8K HDR video record
Top DXOMARK Audio device powered by Snapdragon²

A leader in edge AI



Highest performance

Highest peak performance¹
Up to 2.5X better performance per watt²



Massively scalable

From <1 to 400 TOPS to meet diverse requirements of the edge



AI-enhanced SoCs

Architecture supports AI distributed across entire platform

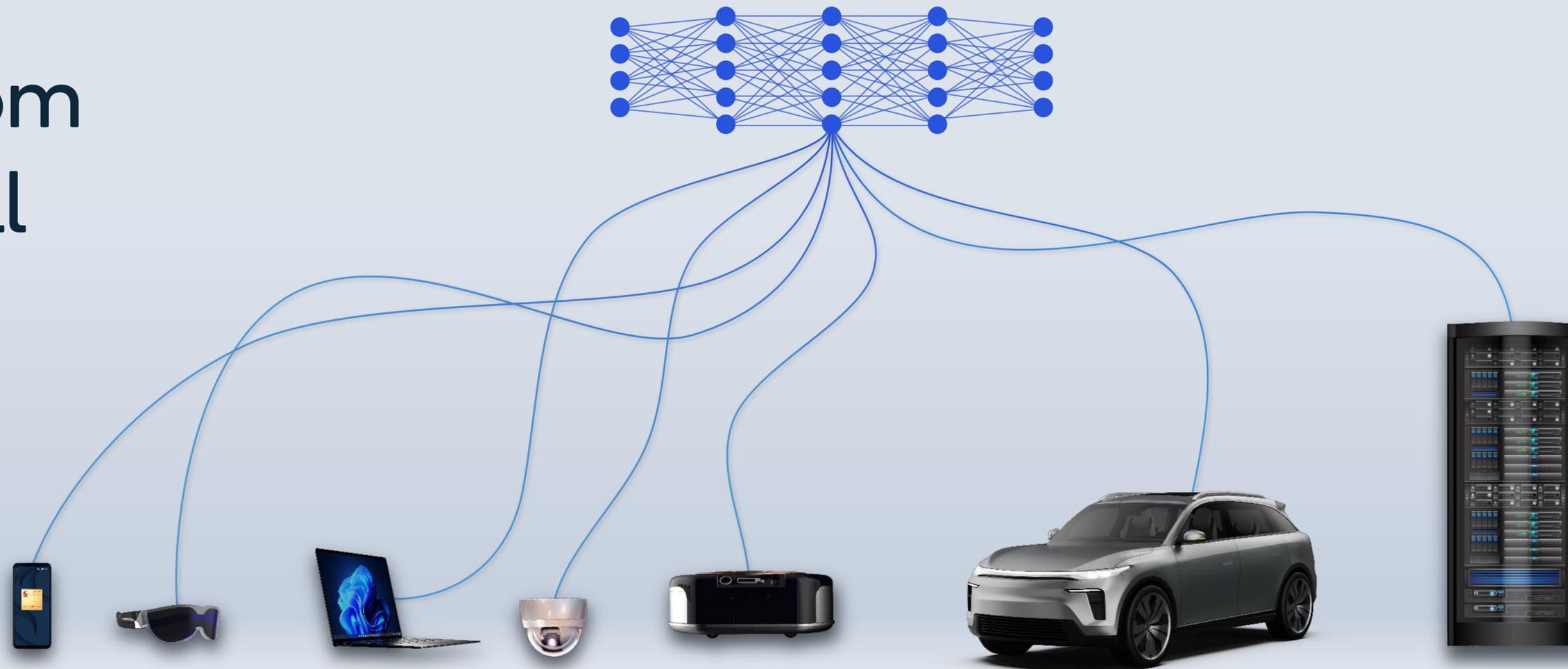


Qualcomm AI Stack

AI Stack

A revolutionary, unified AI software for the edge

Develop once, with freedom
to move across virtually all
our products and tiers





A leader in essential technologies for the
connected intelligent edge

The digital transformation of
automotive is accelerating

The digital transformation of automotive is accelerating

Always connected

Automated driving at scale

Transition to electric vehicles

Car as a platform for new services

New vehicle architectures

Direct relationship with customers

Intelligent transportation systems

Merging of physical and digital spaces



Enabling the car of the future

Always connected

4G/5G cloud connectivity
Wi-Fi, Bluetooth® and GNSS connectivity

Automated driving at scale

Scalable and multi-tier ADAS/AD
Computer vision and sensor fusion
Power efficient on-device AI

Transition to electric vehicles

Powerline communications
Power and thermal-efficient electronics

Car as a platform for new services

New applications and content
OEM and 3rd party services

New vehicle architectures

Software Defined Vehicles
High-performance, low-power central computing
Streamlined product development

Direct relationship with customers

Redefined cockpit experiences
New/enhanced personalized applications
Diagnostics, OTA hardware and software updates

Intelligent transportation systems

Real-time contextual data
Vehicle-to-everything communications
Efficient route planning for reduced emissions

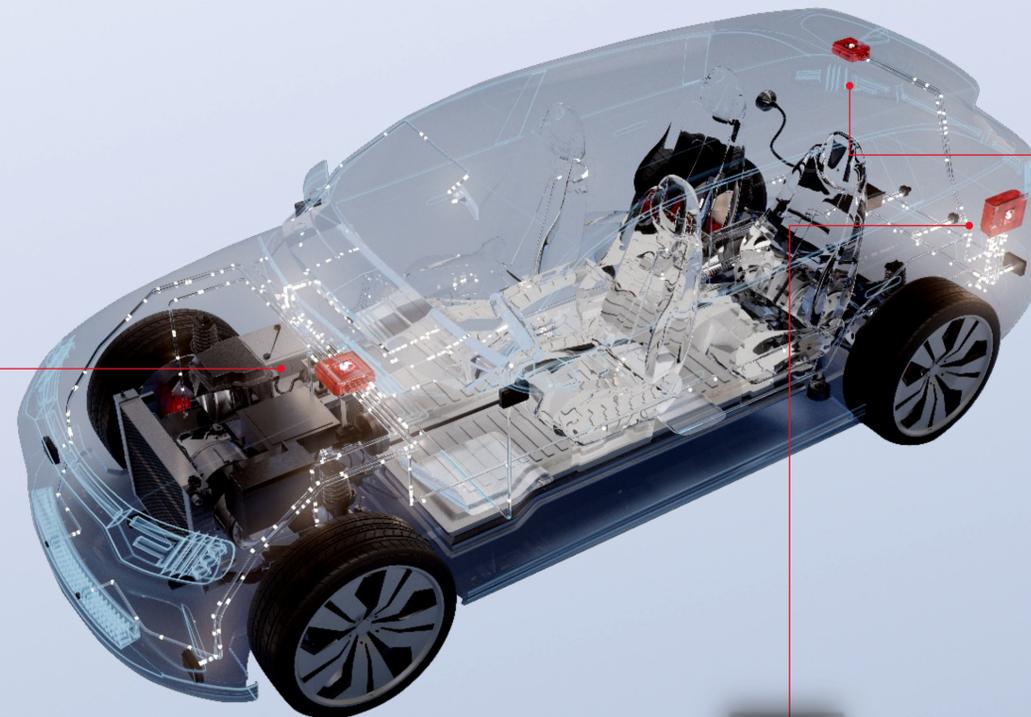
Merging of physical and digital spaces

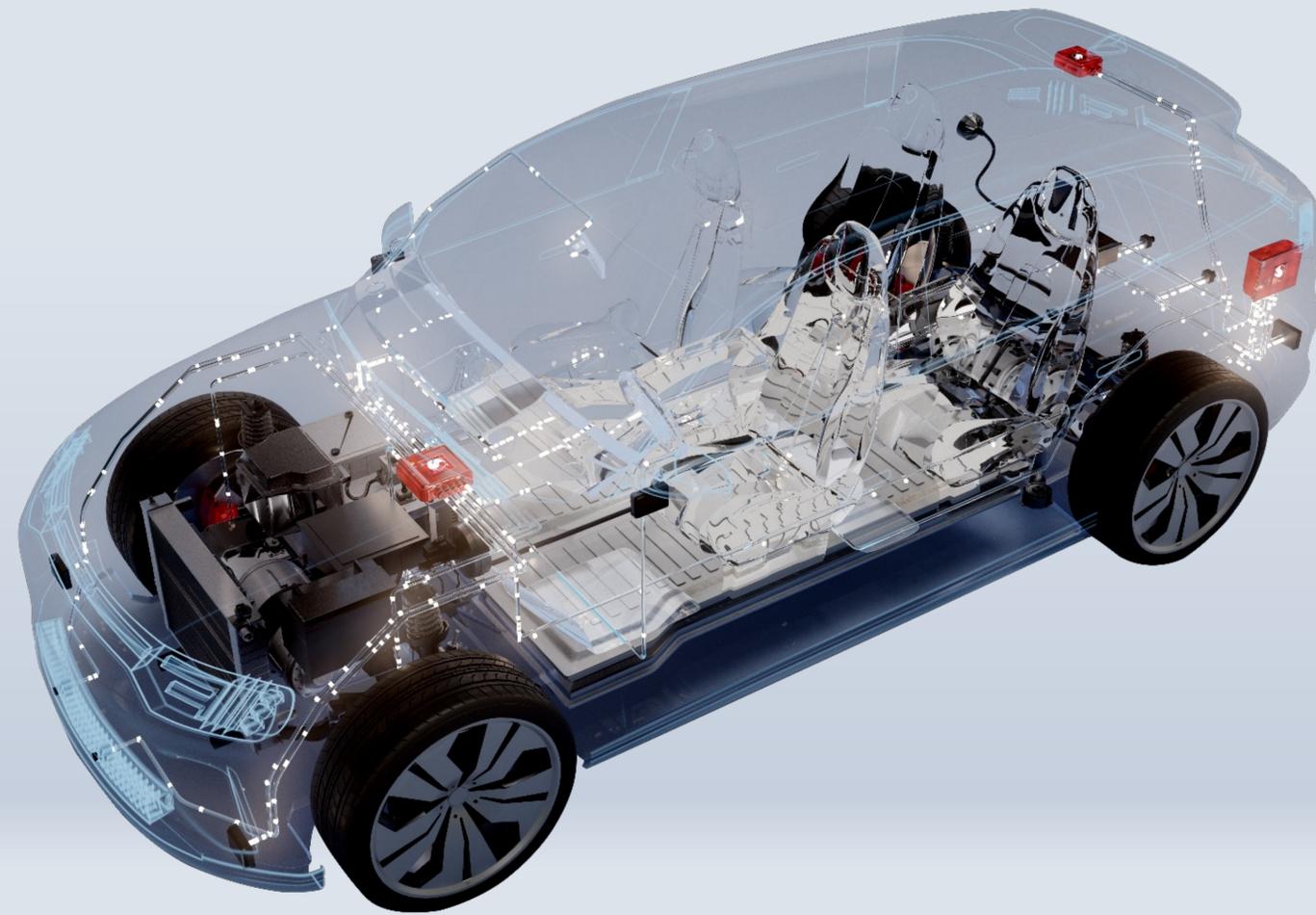
Digital twin of the car
HD maps with precise positioning
AR-enhanced digital clusters
Heads-up displays





A comprehensive digital platform for automotive





Snapdragon
digital chassis

\$30B

Design-win pipeline¹

1. As of September 22, 2022. Does not include \$900 million of RF Front-End design-win pipeline. The design-win pipeline reflects the current estimated future size of awarded automaker programs, based on forecasts provided directly by automakers and Tier-1 suppliers

ASUS AT&T A1 Telekom Austria Group BLACK SHARK Bluetooth BT 中国电信 CHINA TELECOM 中国移动 China Mobile China unicom 中国联通 Deutsche Telekom DOLBY

NTT docomo ellipticlabs ERICSSON ESL FUJITSU Flipkart Google hmd. hp HTC IEEE Advancing Technology for Humanity

JD.COM Jio KDDI kt Lenovo LG Electronics LGU+ MEIZU METARSE Microsoft Motorola

NOKIA 1+ ONEPLUS oppo OPTUS orange Panasonic pixelworks Rakuten REDMAGIC REPUBLIC OF GAMERS

SAMSUNG SHARP Singtel SK telecom SoftBank SONY swisscom Telefonica Telit Telstra

Tencent 腾讯 TIM TMALL T-Mobile verizon vivo vodafone WiFi ALLIANCE ZTE 3GPP A GLOBAL INITIATIVE



Qualcomm

A creator of ecosystems



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Winning the digital future of automotive

Industry trends are increasing demand for our **One Technology Roadmap**

Rapid adoption of our solutions is driving gains across global ecosystem

\$30B design-win pipeline provides confidence in revenue growth forecast

Automotive is generating predictable, long-term earnings **growth and diversification**

Safe harbor

In addition to historical information, this presentation contains forward-looking statements that are inherently subject to risks and uncertainties, including but not limited to statements regarding: our business, product, technology, financial and acquisition strategies, priorities, plans, drivers, opportunities, outlook, estimates, targets and expectations; our growth opportunities, including in automotive, and our being well positioned to take advantage of those opportunities; our diversification strategy; our addressable market and addressable market expansion; our automotive design-win pipeline and revenue forecast; the digital transformation of automotive, automakers becoming technology companies, the car becoming software defined and similar statements; our technologies, technology leadership and technology roadmap; our products, product performance, product leadership, product pipeline and product roadmap; new product releases, announcements and design wins; the benefits of our technologies and products; our business and share trends, as well as market and industry trends and their potential impact on our business and our positioning to take advantage thereof; anticipated demand for our products and technologies; and our estimates, forecasts and guidance related to our financial results. Forward-looking statements are often identified by words such as “estimates,” “forecast,” “guidance,” “future,” “target,” “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: the impact of the COVID-19 pandemic, and government policies and other measures designed to limit its spread; our dependence on a small number of customers and licensees, and particularly from their sale of premium-tier devices; our customers vertically integrating; a significant portion of our business being concentrated in China, which is exacerbated by U.S./China trade and national security tensions; our ability to extend our technologies and products into new and expanded product areas, and industries and applications beyond mobile handsets; our strategic acquisitions, transactions and investments, and our ability to consummate strategic acquisitions; our dependence on a limited number of third-party suppliers; risks associated with the operation and control of our manufacturing facilities; security breaches of our information technology systems, or other misappropriation of our technology, intellectual property or other proprietary or confidential information; our ability to attract and retain qualified employees, and to successfully operate under a hybrid working environment; the continued and future success of our licensing programs, which requires us to continue to evolve our patent portfolio and to renew or renegotiate license agreements that are expiring; efforts by some OEMs to avoid paying fair and reasonable royalties for the use of our intellectual property, and other attacks on our licensing business model; potential changes in our patent licensing practices, whether due to governmental investigations, legal challenges or otherwise; adverse rulings in governmental investigations or proceedings; our customers’ and licensees’ sales of products and services based on CDMA, OFDMA and other communications technologies, including 5G, and our customers’ demand for our products based on these technologies; competition in an environment of rapid technological change, and our ability to adapt to such change and compete effectively; failures in our products or in the products of our customers or licensees, including those resulting from security vulnerabilities, defects or errors; difficulties in enforcing and protecting our intellectual property rights; claims by third parties that we infringe their intellectual property; our use of open source software; the cyclical nature of the semiconductor industry, declines in global, regional or local economic conditions, or our stock price and earnings volatility; our ability to comply with laws, regulations, policies and standards; our indebtedness; and potential tax liabilities. These and other risks are set forth in our Quarterly Report on Form 10-Q for the fiscal quarter ended June 26, 2022 filed with the Securities and Exchange Commission (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.

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Thank you

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