

MOOLY EDEN

Vice President
General Manager, PC Client Group



Human Beings Are Unique
for Their Ability to Create

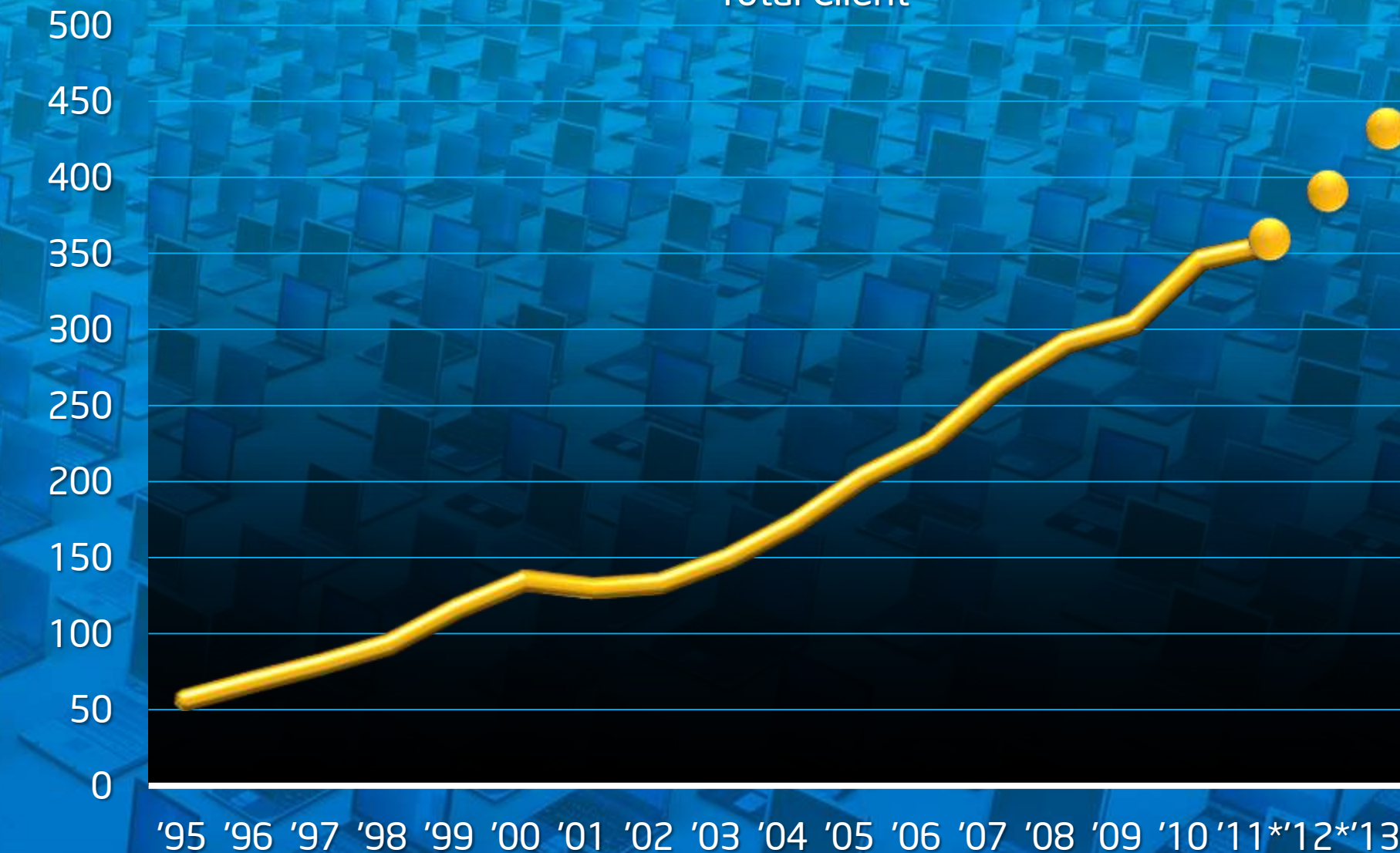
PC Growth

Millions

Total Client

1M

PCs Shipped Everyday



Source: IDC, *Forecast

Emerging Markets Driving Growth

PC TAM Growth*
2010-2011

México
+22%

Colombia
+21%

Perú
+31%

Chile
+26%

Venezuela
+23%

Brasil
+23%

Argentina
+35%

Czech Republic
+26%

Hungary
+36%

South Africa
+23%

Turkey
+21%

Israel
+23%

India
+19%

China
+12%

Russia
+18%

Philippines
+22%

Indonesia
+22%

We Know How to Transform Experiences

Multi-media
CD ROM



1995



We Know How to Transform Experiences

Multi-media
CD ROM



1995

Mobility



2003



Transforming Experiences

Multi-media
CD ROM

Mobility

Ultrabook™



1995

2003

2011+

Entire PC Experience





Today's Usage Models



Other brands and names are the property of their respective owners.

IDF2011
INTEL DEVELOPER FORUM



CPU



MEDIA



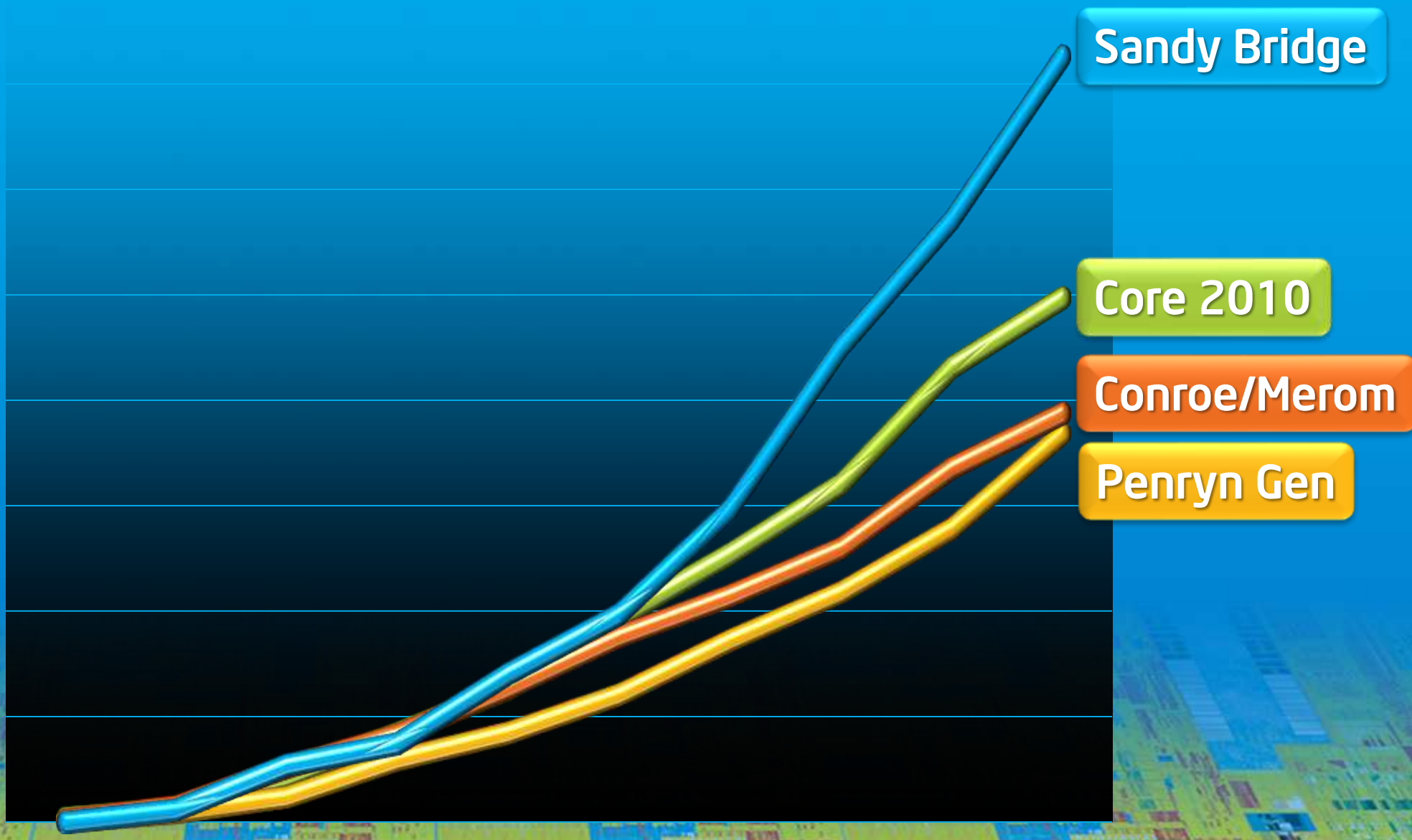
GRAPHICS



75 Mu
Sandy Bridge
Shipped

Client Shipments

MU
80
70
60
50
40
30
20
10
0



Sandy Bridge

Core 2010

Conroe/Merom

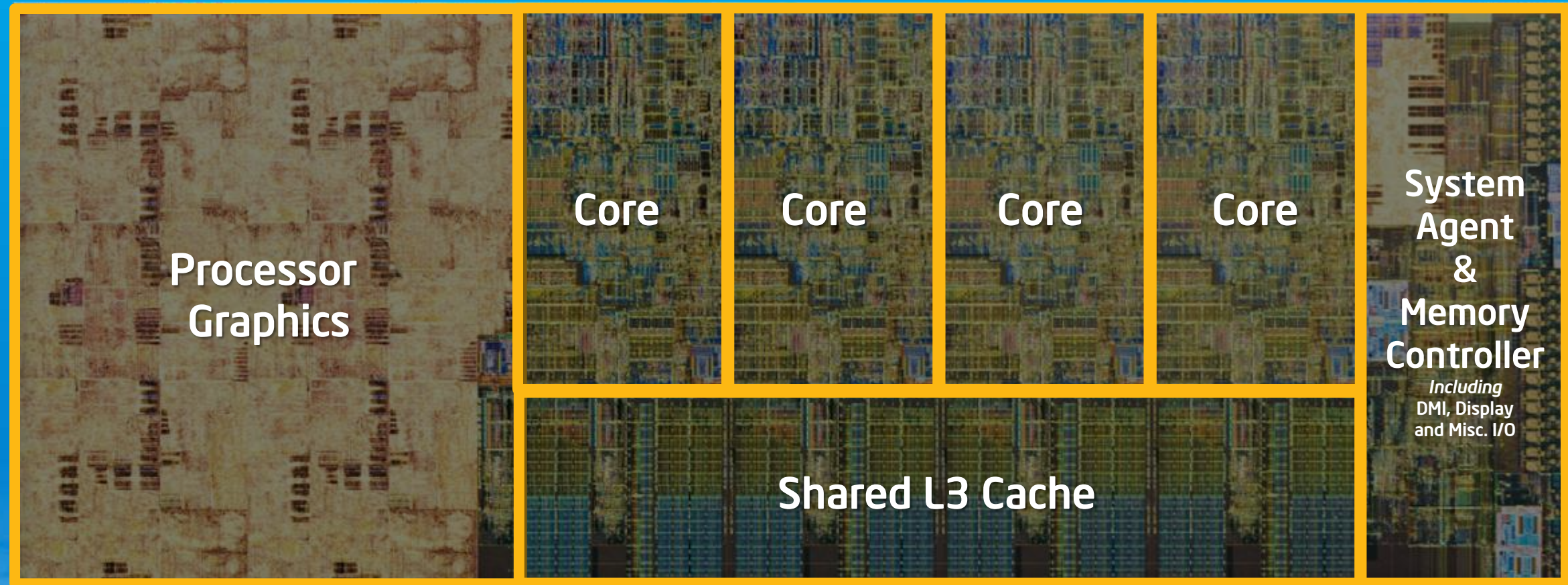
Penryn Gen



Ivy Bridge

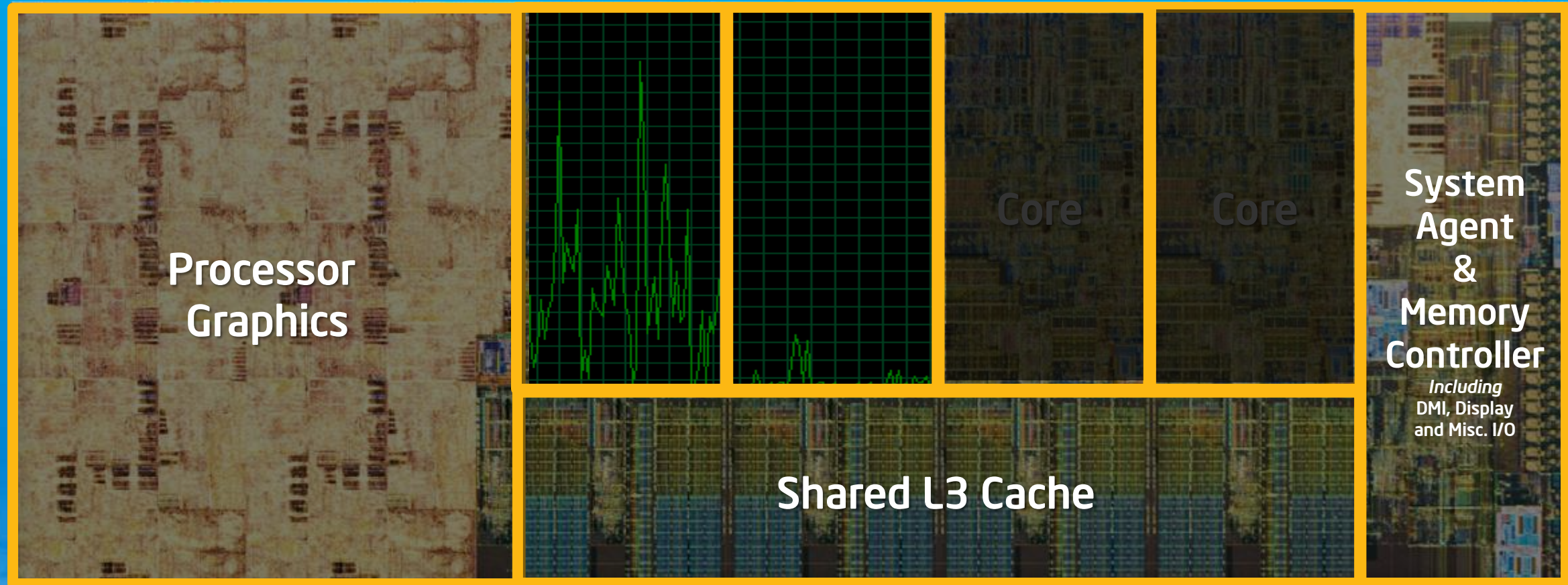
Ivy Bridge

3rd Generation Intel® Core™ Processor 22nm

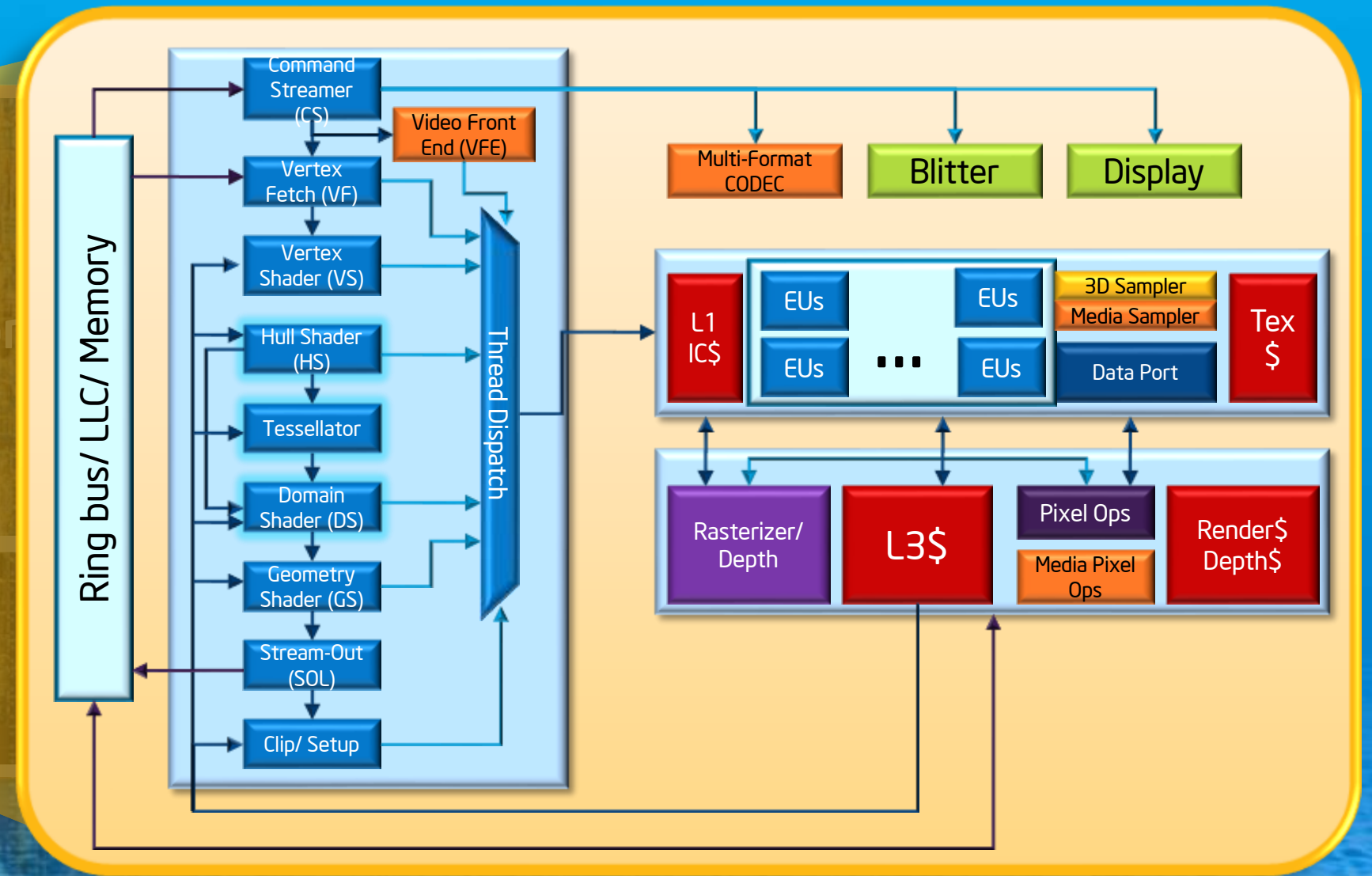
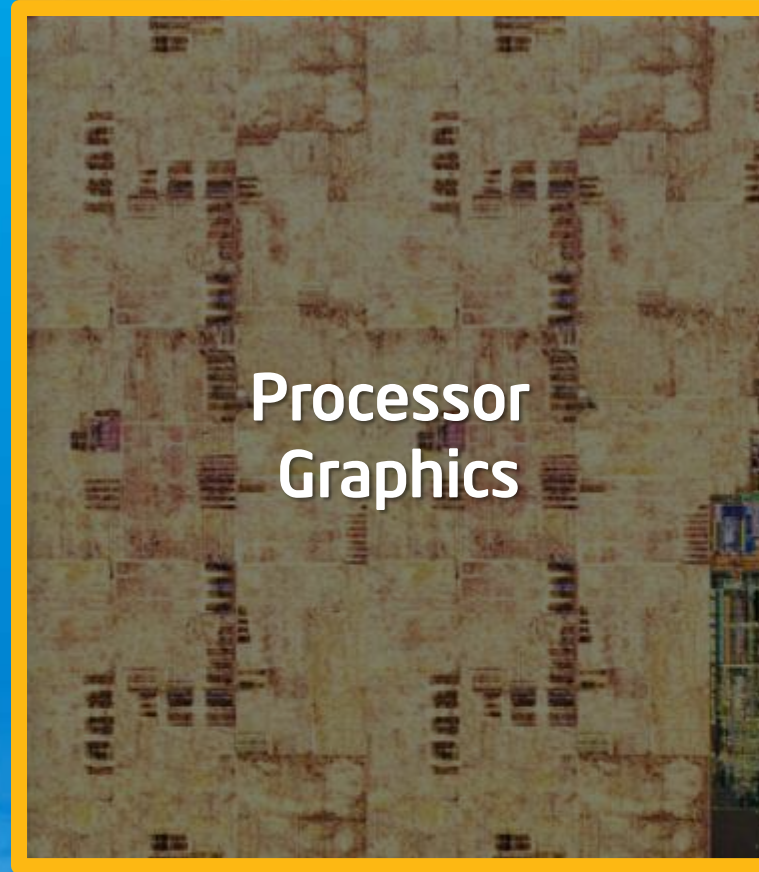


Ivy Bridge Power Aware Interrupt Routing

Power Save Mode



Ivy Bridge Graphics Architecture

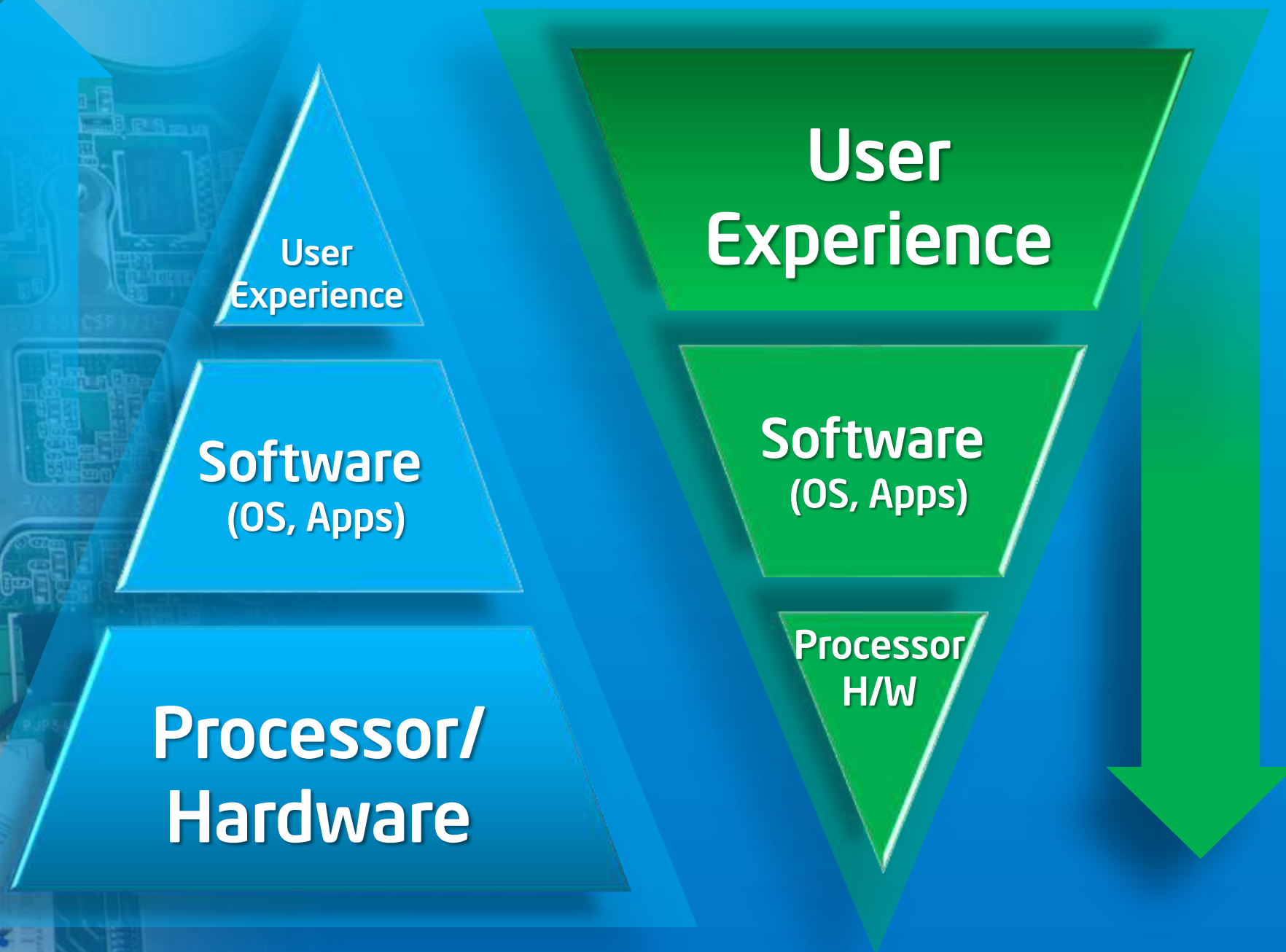


Mainstream Gaming

GRAPHICS



USER EXPERIENCE



What Do People Want Out of Their Computing?



The Ultrabook™

Beyond Thin and Light

CREATION TO EXPRESS



NOT NEEDING TO WAIT



PEACE OF MIND



REFLECTION OF ME



ALWAYS AVAILABLE



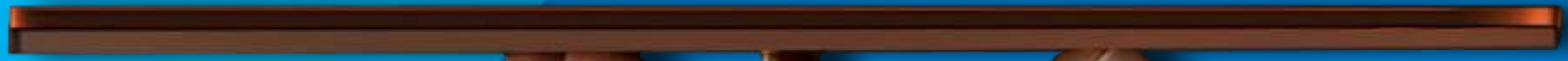
AT A PRICE THAT WORKS



Ultrabook™

The Ultrabook™

Beyond Thin and Light



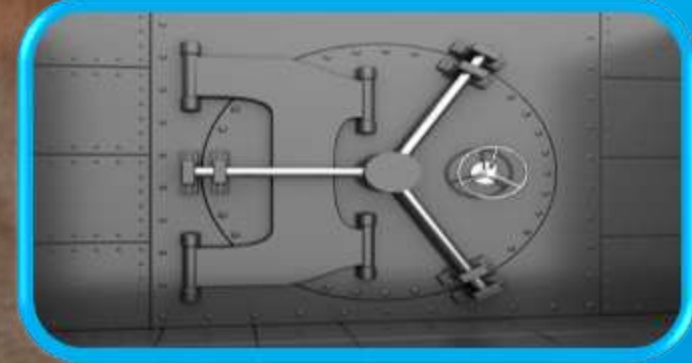
PERFORMANCE



RESPONSIVE



PROTECTION



FORM FACTOR



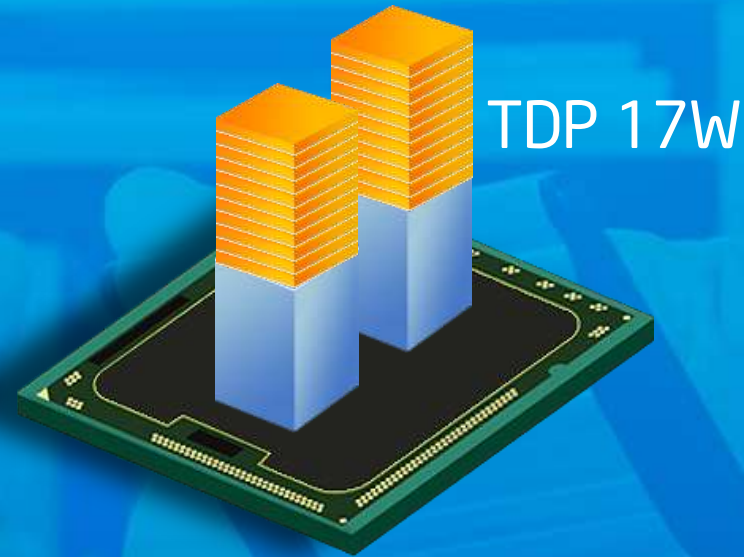
POWER / BATTERY LIFE



ECOSYSTEM & COST

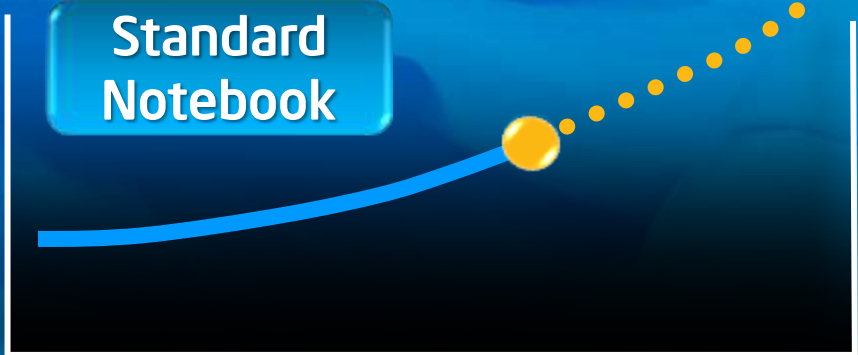
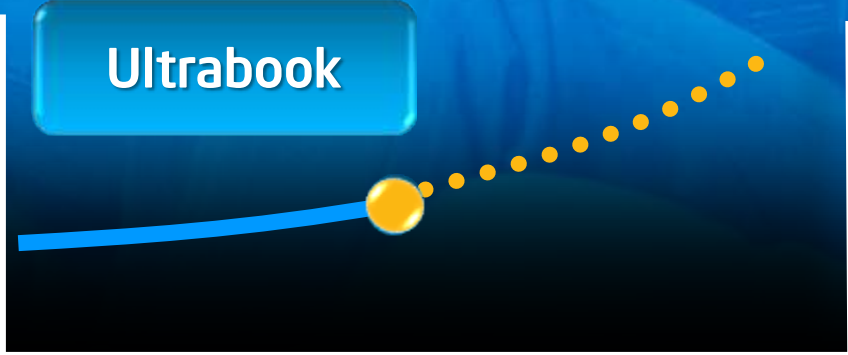
Ultrabook™ Turbo

RESPONSIVE



Turbo

Turbo



Intel® Rapid Start Technology



RESPONSIVE



Intel® Smart Connect Technology

Content continuously updated while the notebook is asleep!



Intel® Smart Response Technology

Enabling SSD-like performance with HDD capacity



Protection and Trust Built In

Intel® Identity Protection Technology

PROTECTION



Intel® Anti-Theft Technology



Announcing Anti-Theft Solution for Consumers with Ultrabooks™



intel ANTI-THEFT
TECHNOLOGY



McAfee®

Todd Gebhart

Co-President,
Executive Vice President & General Manager,
Consumer, Mobile & Small Business
McAfee

A silver laptop is shown from a three-quarter perspective, open. The screen displays a large, glowing blue dollar sign (\$) centered within a grid of small squares. The background of the entire image is a vibrant blue with abstract, geometric patterns of light and shadow, suggesting a digital or network environment. The text 'Secure' is positioned in the upper right, and 'Online Transactions' is below it, both in white with a slight shadow effect. A thin yellow and green horizontal line separates the two text elements.

Secure

Online Transactions

What It Takes To Get Thin

FORM FACTOR



Intel Establishes \$300 Million Investment Fund

ECOSYSTEM & COST



New and Enhanced User Experience
New Slim Components
Innovative Platform Technologies



Ultrabooks Set to Adopt Lots of Cutting-edge Laptop Technology Features



Intel to put \$300M fund into 'Ultrabook'

Holiday 2011 Ultrabooks™



Asus UX31



Acer S3/Aspire 3951



LG



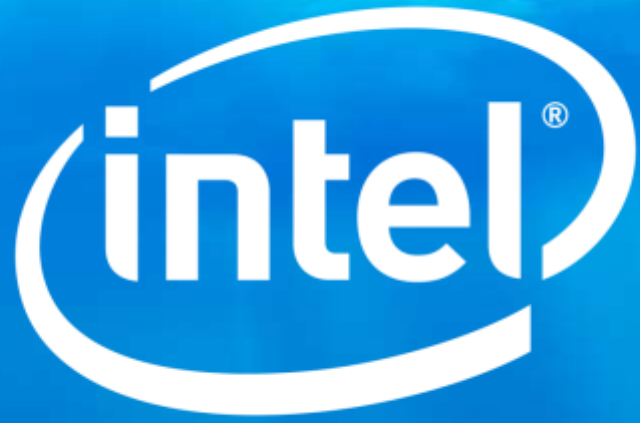
Lenovo IdeaPad
U300s



Toshiba Portege
Z830 Series



Samsung Series 9



Microsoft[®]



Future Ultrabook™ Designs from ODMs



Compal - 13.3"



Foxconn - 13.3"



Inventec - 13.3"



Pegatron - 13.3"



Pegatron - 14.1"



Quanta - 13.3"

Panel Self Refresh Technology



Shuriken Panel



Thunderbolt™ - On Windows!



Innovation ACCELERATED

Retargeted Silicon Design

New Power
Management Framework

Efficient System Design

Mainstream Notebook
Connected Standby Power



2011



>20X!

2013
TARGETS

Uncompromised
Performance

All Day Use

>10 Days of
Connected Standby

Enabled By

Intel Power Optimizer

The 2013 Ultrabook™ **PC** CREATIVITY PERSONAL



Summary

PC Market is Growing

Ivy Bridge is More Than a TICK with Stunning Visuals

Performance That Delivers User Experience

Ultrabook™ Will Transform the PC Category

Haswell Will Complete the Ultrabook Revolution

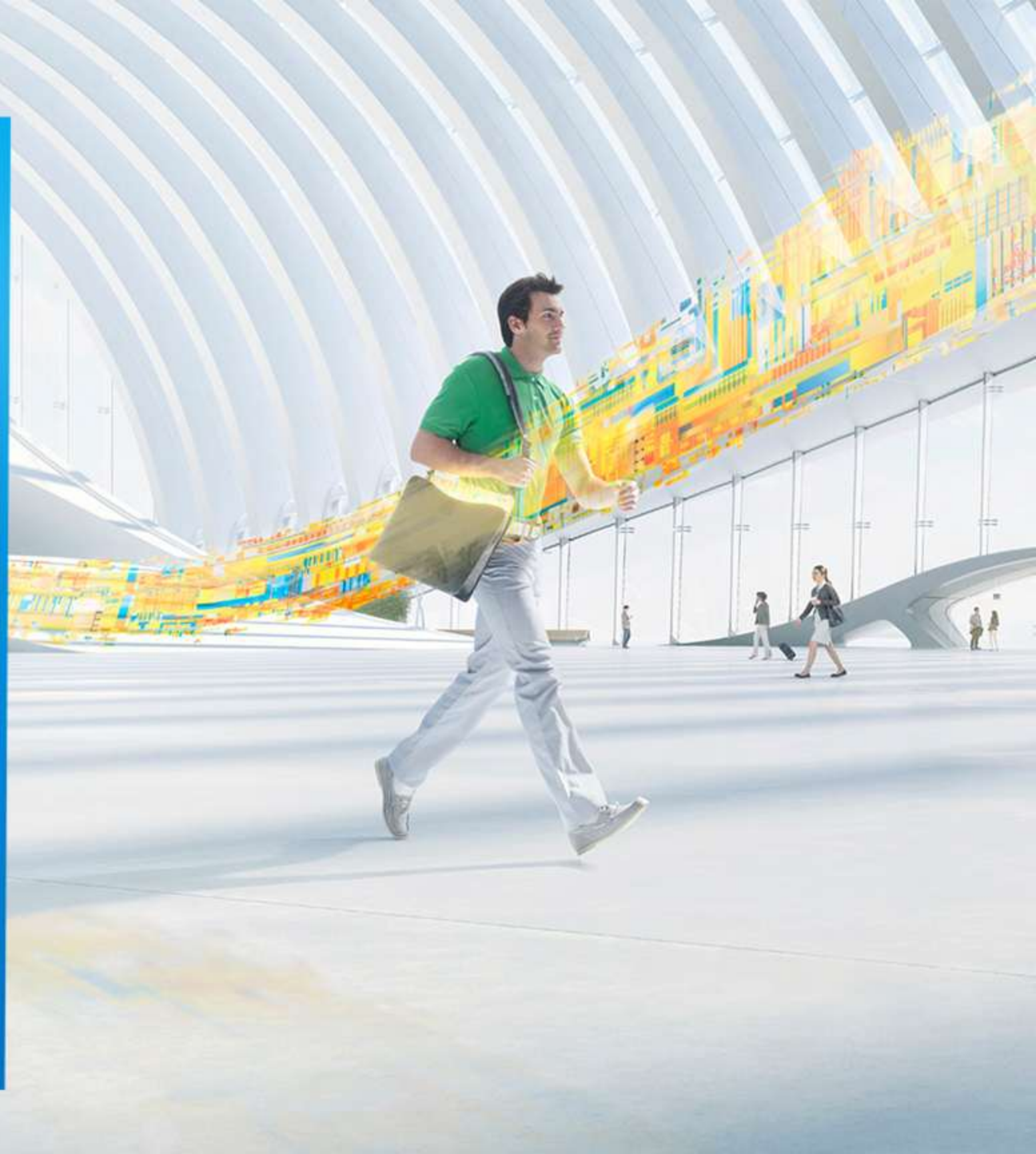


IDF2011

INTEL DEVELOPER FORUM



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Risk Factors

The above statements and any others in this document that refer to plans and expectations for the third quarter, the year and the future are forward-looking statements that involve a number of risks and uncertainties. Words such as “anticipates,” “expects,” “intends,” “plans,” “believes,” “seeks,” “estimates,” “may,” “will,” “should,” and their variations identify forward-looking statements. Statements that refer to or are based on projections, uncertain events or assumptions also identify forward-looking statements. Many factors could affect Intel’s actual results, and variances from Intel’s current expectations regarding such factors could cause actual results to differ materially from those expressed in these forward-looking statements. Intel presently considers the following to be the important factors that could cause actual results to differ materially from the company’s expectations. Demand could be different from Intel’s expectations due to factors including changes in business and economic conditions, including supply constraints and other disruptions affecting customers; customer acceptance of Intel’s and competitors’ products; changes in customer order patterns including order cancellations; and changes in the level of inventory at customers. Intel operates in intensely competitive industries that are characterized by a high percentage of costs that are fixed or difficult to reduce in the short term and product demand that is highly variable and difficult to forecast. Revenue and the gross margin percentage are affected by the timing of Intel product introductions and the demand for and market acceptance of Intel’s products; actions taken by Intel’s competitors, including product offerings and introductions, marketing programs and pricing pressures and Intel’s response to such actions; and Intel’s ability to respond quickly to technological developments and to incorporate new features into its products. The gross margin percentage could vary significantly from expectations based on capacity utilization; variations in inventory valuation, including variations related to the timing of qualifying products for sale; changes in revenue levels; product mix and pricing; the timing and execution of the manufacturing ramp and associated costs; start-up costs; excess or obsolete inventory; changes in unit costs; defects or disruptions in the supply of materials or resources; product manufacturing quality/yields; and impairments of long-lived assets, including manufacturing, assembly/test and intangible assets. Expenses, particularly certain marketing and compensation expenses, as well as restructuring and asset impairment charges, vary depending on the level of demand for Intel’s products and the level of revenue and profits. The tax rate expectation is based on current tax law and current expected income. The tax rate may be affected by the jurisdictions in which profits are determined to be earned and taxed; changes in the estimates of credits, benefits and deductions; the resolution of issues arising from tax audits with various tax authorities, including payment of interest and penalties; and the ability to realize deferred tax assets. Gains or losses from equity securities and interest and other could vary from expectations depending on gains or losses on the sale, exchange, change in the fair value or impairments of debt and equity investments; interest rates; cash balances; and changes in fair value of derivative instruments. The majority of Intel’s non-marketable equity investment portfolio balance is concentrated in companies in the flash memory market segment, and declines in this market segment or changes in management’s plans with respect to Intel’s investments in this market segment could result in significant impairment charges, impacting restructuring charges as well as gains/losses on equity investments and interest and other. Intel’s results could be affected by adverse economic, social, political and physical/infrastructure conditions in countries where Intel, its customers or its suppliers operate, including military conflict and other security risks, natural disasters, infrastructure disruptions, health concerns and fluctuations in currency exchange rates. Intel’s results could be affected by the timing of closing of acquisitions and divestitures. Intel’s results could be affected by adverse effects associated with product defects and errata (deviations from published specifications), and by litigation or regulatory matters involving intellectual property, stockholder, consumer, antitrust and other issues, such as the litigation and regulatory matters described in Intel’s SEC reports. An unfavorable ruling could include monetary damages or an injunction prohibiting us from manufacturing or selling one or more products, precluding particular business practices, impacting Intel’s ability to design its products, or requiring other remedies such as compulsory licensing of intellectual property. A detailed discussion of these and other factors that could affect Intel’s results is included in Intel’s SEC filings, including the report on Form 10-Q for the quarter ended April 2, 2011.