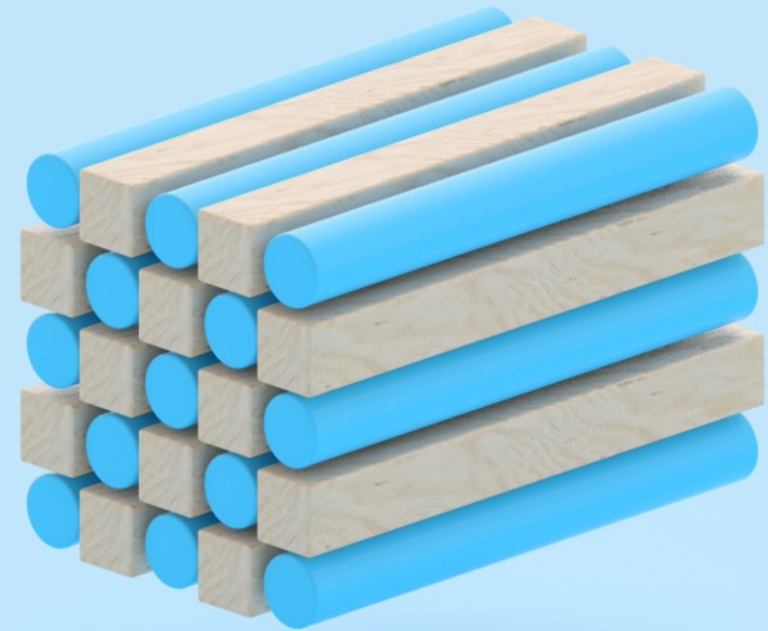


Gaining share in the enterprise data center

Building on the strength of our industry leading portfolio

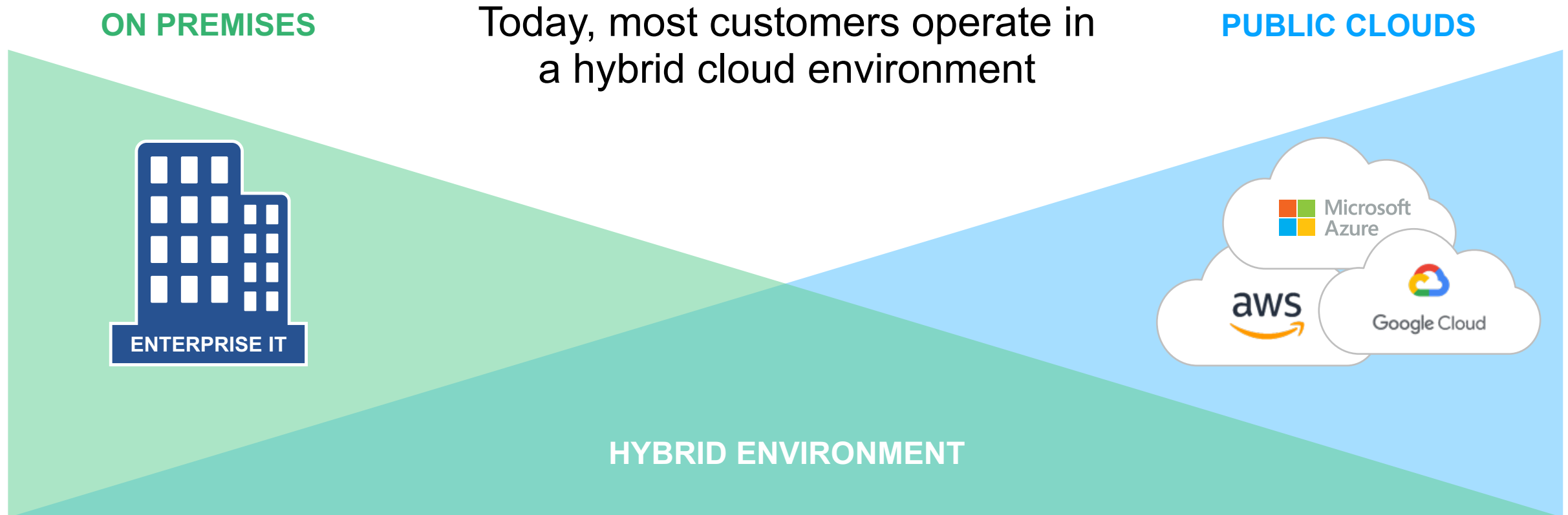


Brad Anderson
EVP and General Manager, Hybrid Cloud Group
September 16, 2020



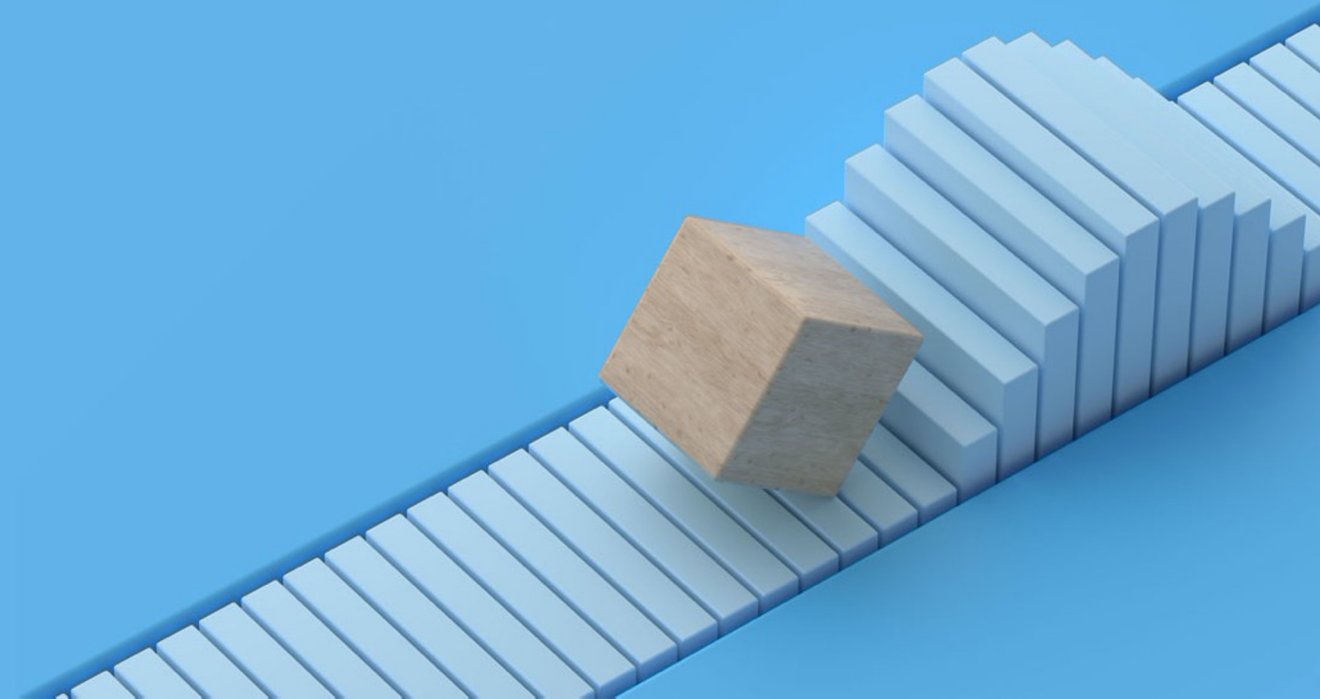
On premises, hybrid clouds or public clouds: better together

An investment in NetApp is future ready



On-premises is evolving

The enterprise data center market is evolving favorably for NetApp



Market and competitive forces are driving change and growth

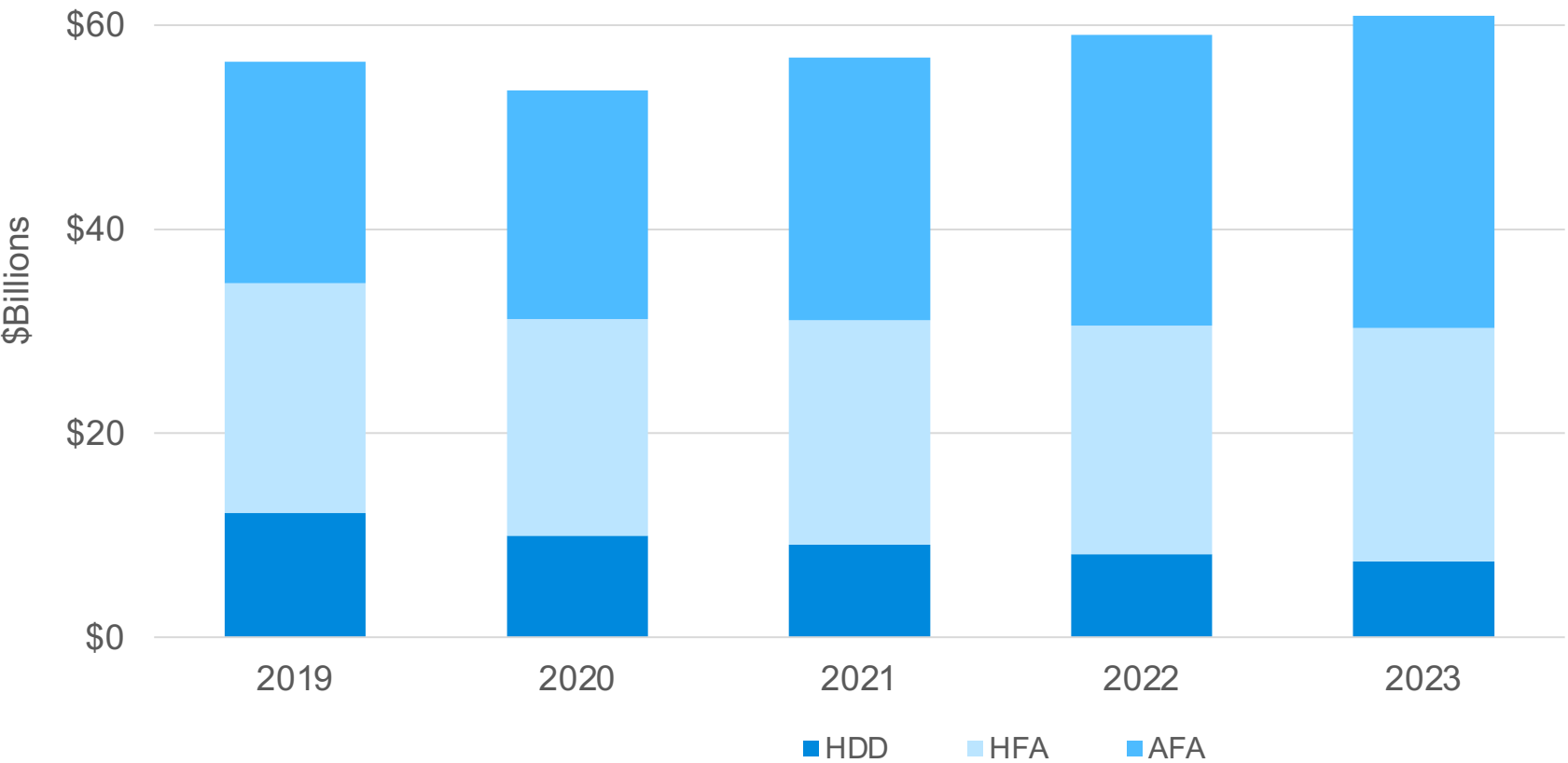
The opportunities are coming to NetApp

Digital transformation
is accelerating

Markets are
in transition

Competitors are
in transition

Over indexed to the fastest growing segment



▲ 9% CAGR

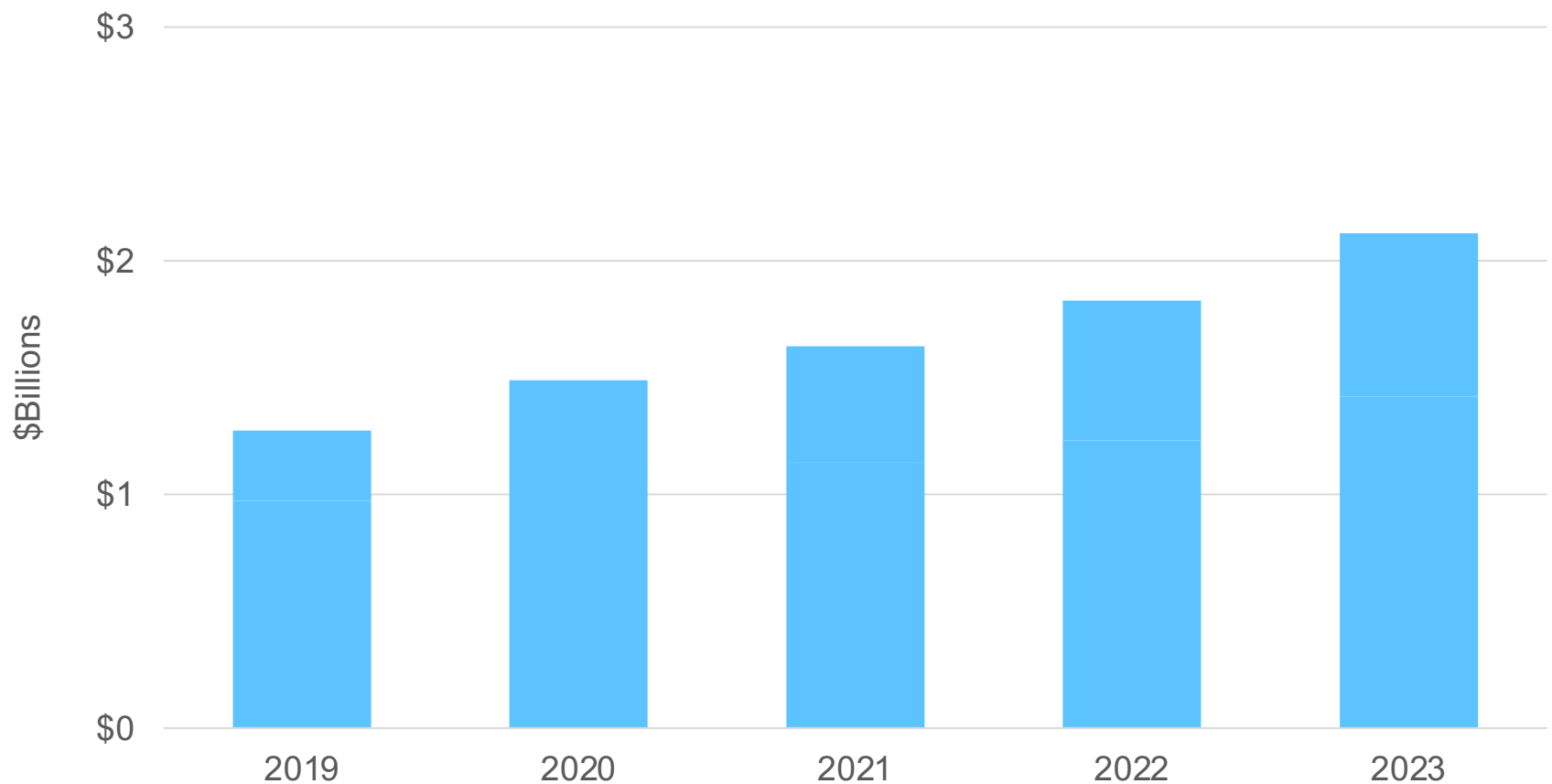
All-flash array market

Growth drivers:

- High performance workloads
- AI, ML, analytics
- Midrange refresh

Source : 2020 Q1 Enterprise system tracker and forecast, NetApp internal estimates
Inclusive of storage in CI and HCI deployments

Uniquely positioned in a rapidly growing market



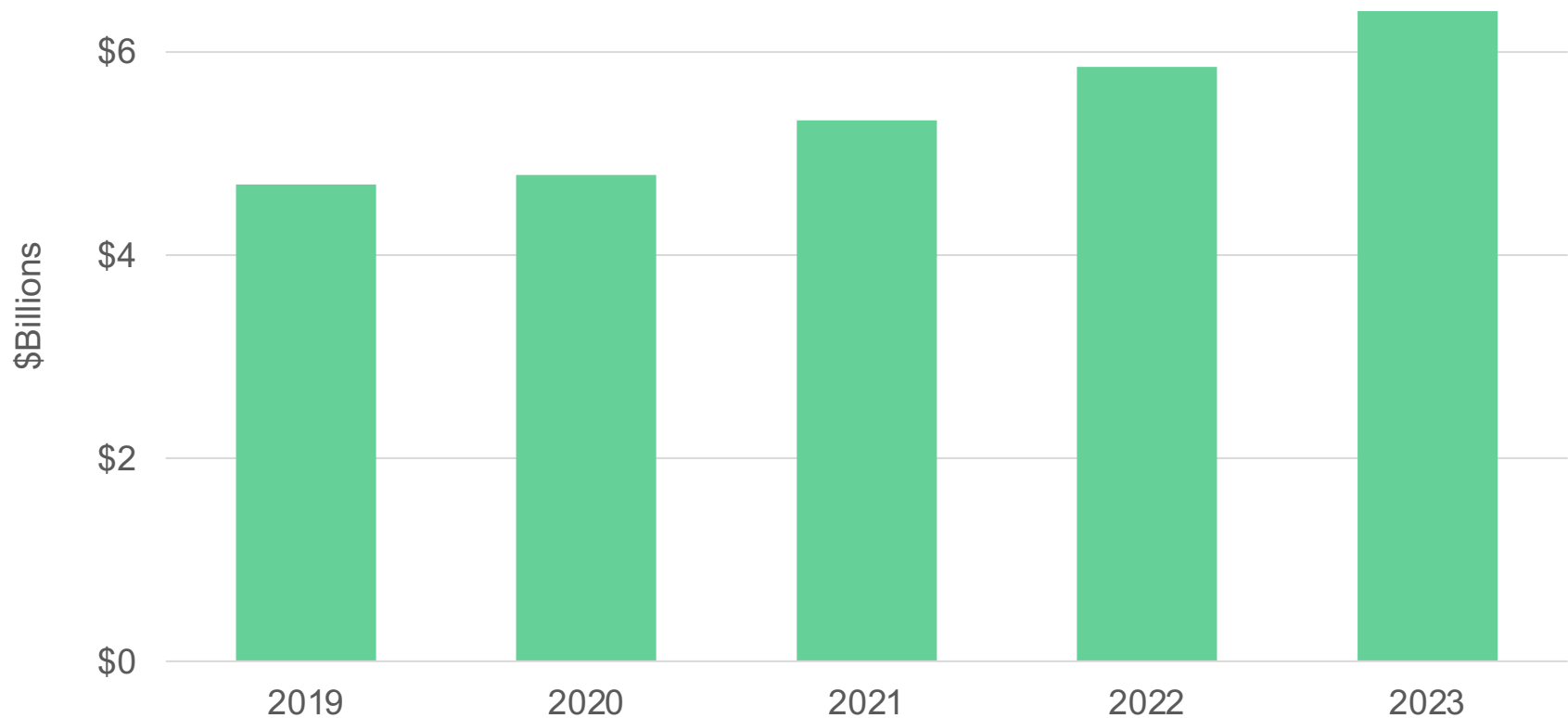
▲ **13%** CAGR
Object storage market

Growth drivers:

- Flash tiering (FabricPool)
- Key industries
 - Media & Entertainment
 - Life Sciences
 - Financials
 - Manufacturing
 - Automotive

Source: IDC Quarterly Enterprise Storage Systems Tracker, Worldwide File- and Object-Based Storage Forecast, 2020–2024

Private cloud completes the enterprise



▲ 8% CAGR

Private cloud market

Growth drivers:

- Cloud-like IT service delivery
- Virtualization/VDI
- Enterprise applications
- Analytics (e.g. Splunk)

Source: Gartner, IDC Enterprise infra. systems tracker forecast, Bus Ops Analytics, NetApp internal estimates

Industry leaders rely on NetApp

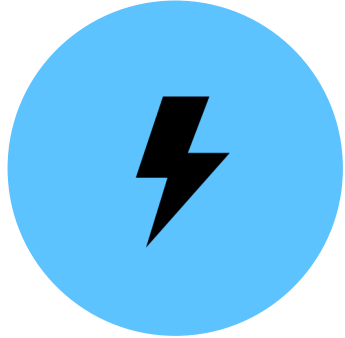
X of the top 10 companies in their industries use NetApp on premises



Data considered for the following products – AFF, EF, FAS Hybrid, E-Series Hybrid, NetApp HCI, NFLEX, ONTAP Select, Host Based Software, StorageGrid, SolidFire AFA

NetApp is the innovation leader

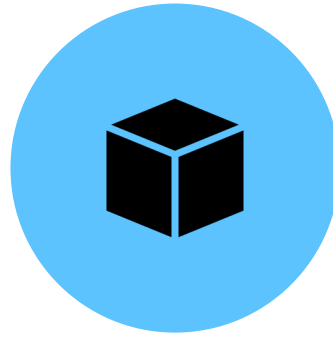
Recognized by industry analysts



**UNIFIED
STORAGE**

LEADER

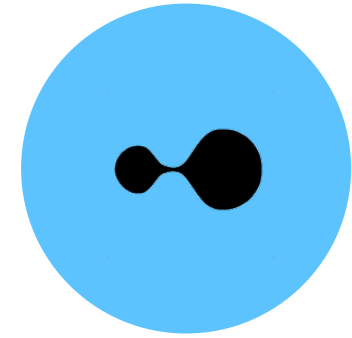
Gartner Magic Quadrant:
2019 GMQ leader in Primary
Storage



**OBJECT
STORAGE**

LEADER

IDC MarketScape: Worldwide
Object-Based Storage 2019
Vendor Assessment



**CONVERGED
INFRASTRUCTURE**

LEADER

Gartner Peer Insights
5-Star Award,
November 2019

Software innovation

Extending our software innovation to help customers thrive in a hybrid cloud world



ONTAP innovation

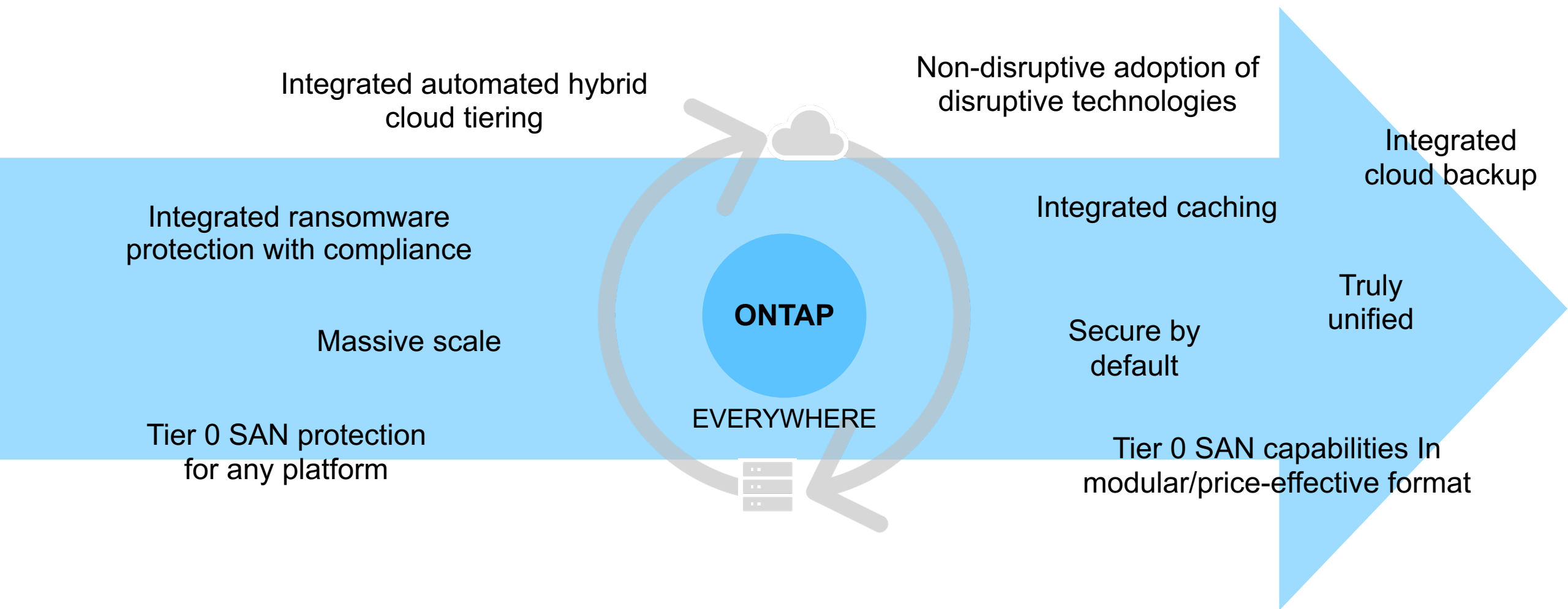
25+ years of software innovation and excellence

ONTAP is...

- The most powerful, most cloud-connected storage operating system
- Most efficient storage operating system on the market
- The foundation of our growth in enterprise data centers and in the clouds
- Built into the biggest public clouds as a native first-party service



ONTAP innovation delivered...



NetApp simplifies customer environments

Only NetApp



Single architecture

for tier 0 enterprise
applications and massive
file storage



Move data automatically

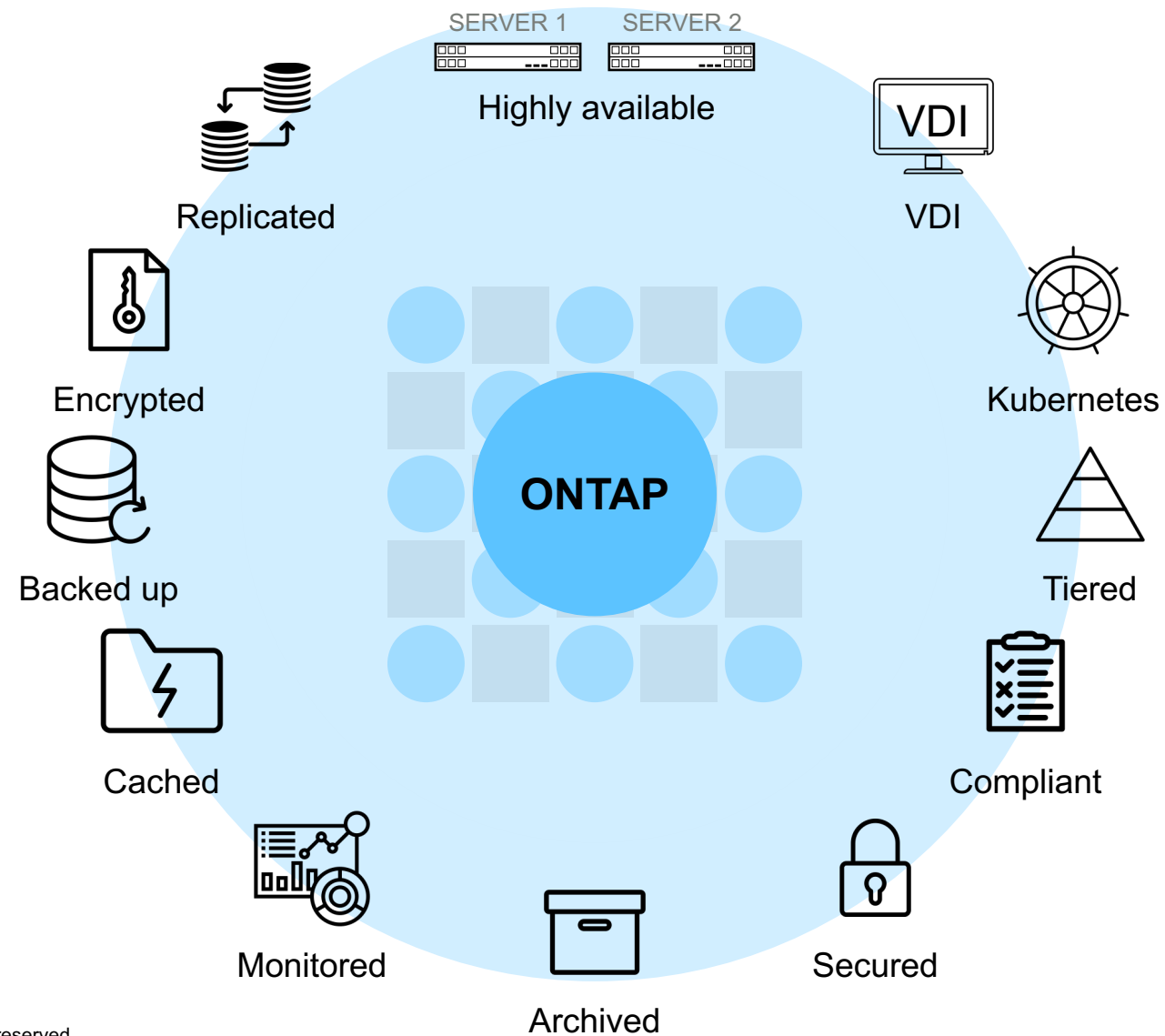
into any cloud or on premises:
the right data in the right place
at the right time



Non-disruptive adoption

of new technologies
with transparent
application migration

The same rich data services – in the enterprise and in the cloud



ONTAP innovation continues



**Software-defined
solutions**

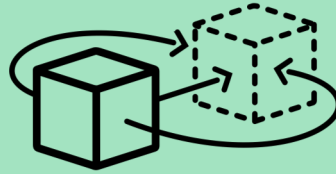


Kubernetes

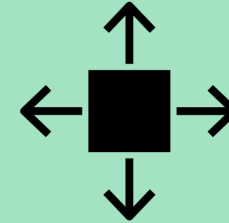


Virtual machines

**Kubernetes
and VM parity**



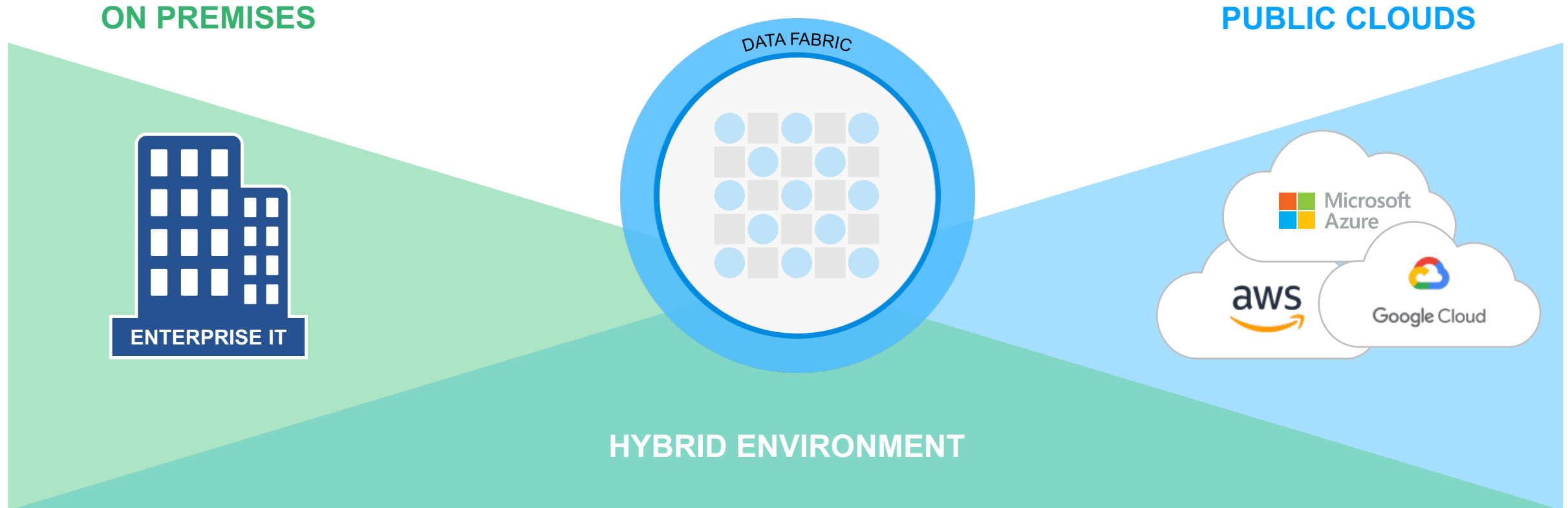
**Data persistence +
application mobility**



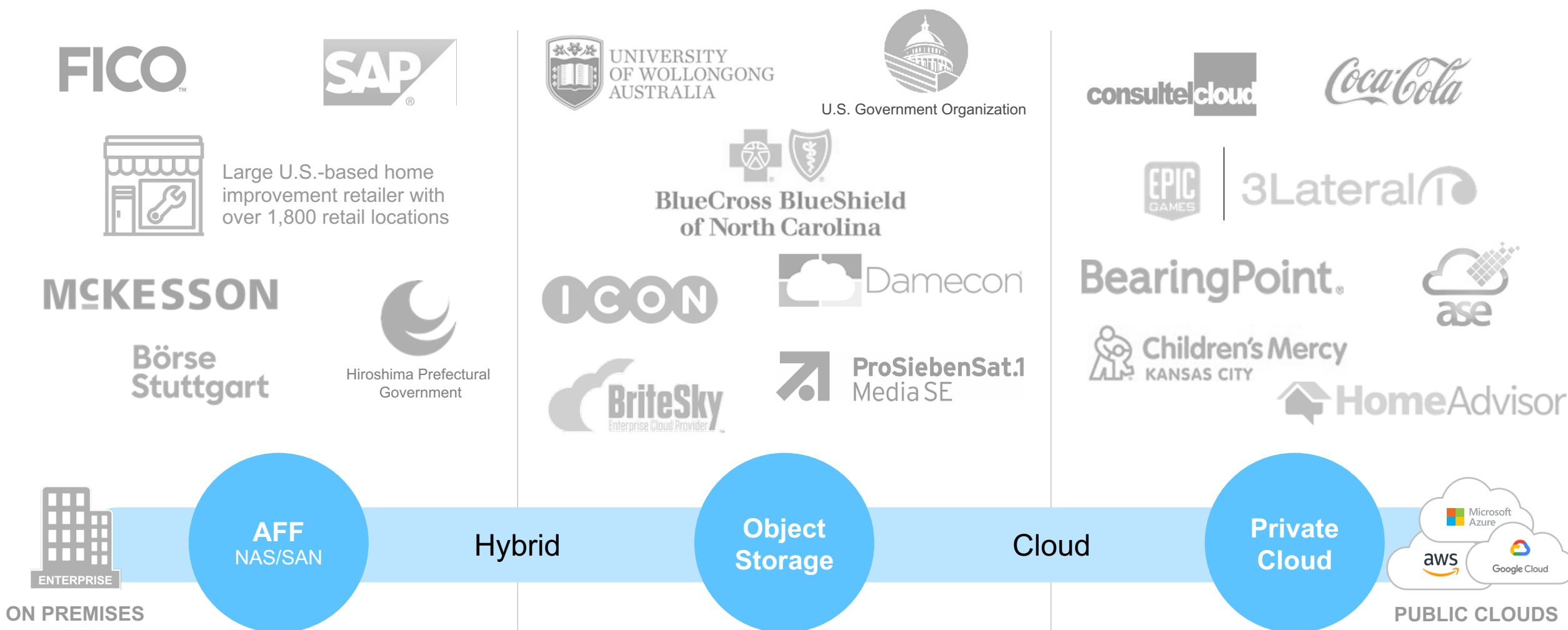
**Scale-out modular
architecture**



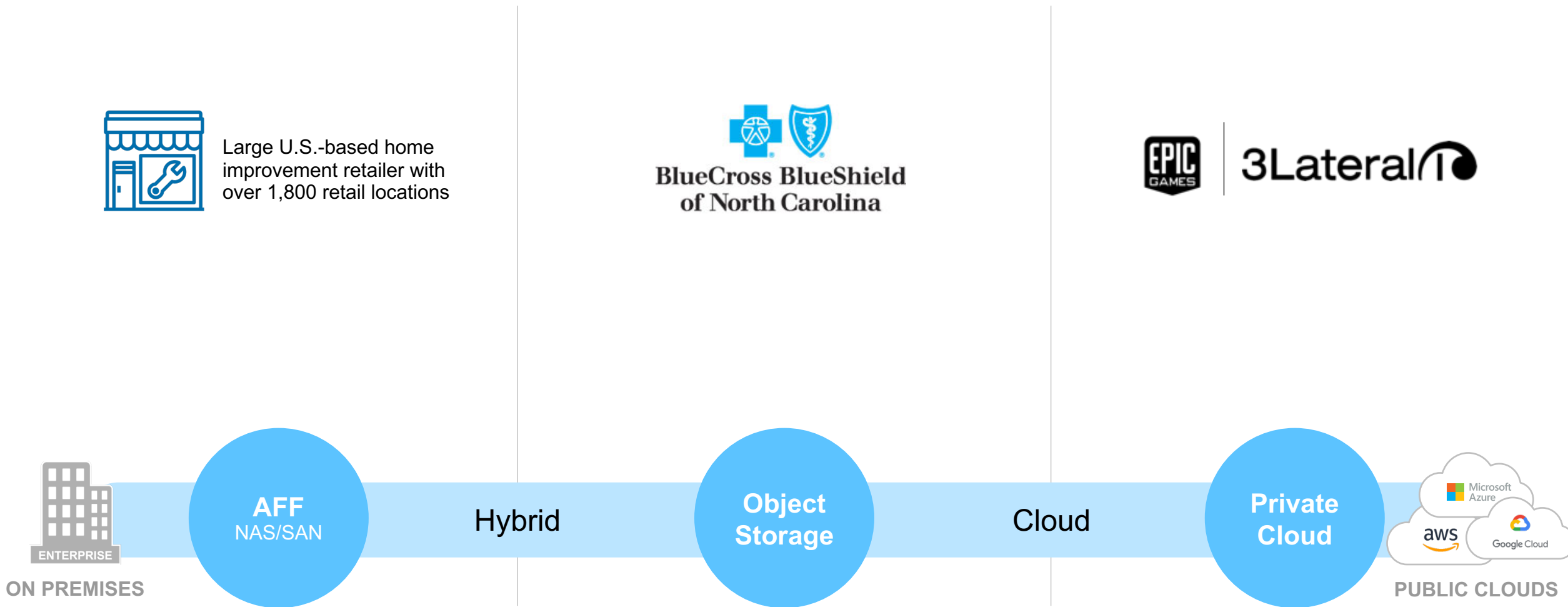
The data fabric makes hybrid cloud work



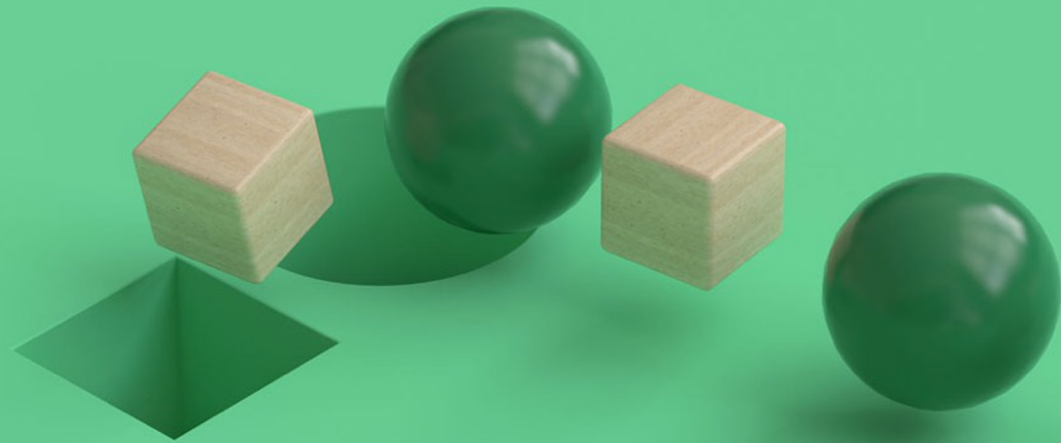
Leading organizations expanding with NetApp



Leading organizations expanding with NetApp



Why we win



Market and competitive
transitions are driving growth...

... growth that plays
to NetApp strengths.

Customers choose NetApp
because we have the best technology
for the enterprise data center...
... and the cloud.

NetApp is leading the future...

... driving software innovation excellence
for customer digital transformation journeys.

NetApp will grow by
expanding flash adoption,
delivering a simple and powerful
cloud-like experience, and empowering
customers to thrive in a hybrid world.

Our data fabric strategy offers customers
seamless investment-protected hybrid cloud.

NetApp unlocks the best of cloud.

**NetApp unlocks
the best of cloud**

