



NETGEAR®

Product Portfolio



STRATEGY FOR GROWTH



Technology Inflections



Create New Categories



Recurring Service Revenue



Orbi Mesh



Content Streaming



5G



WiFi 6



Gaming

Key Technology Inflections

New Categories



PoE+



10 Gig



Pro AV



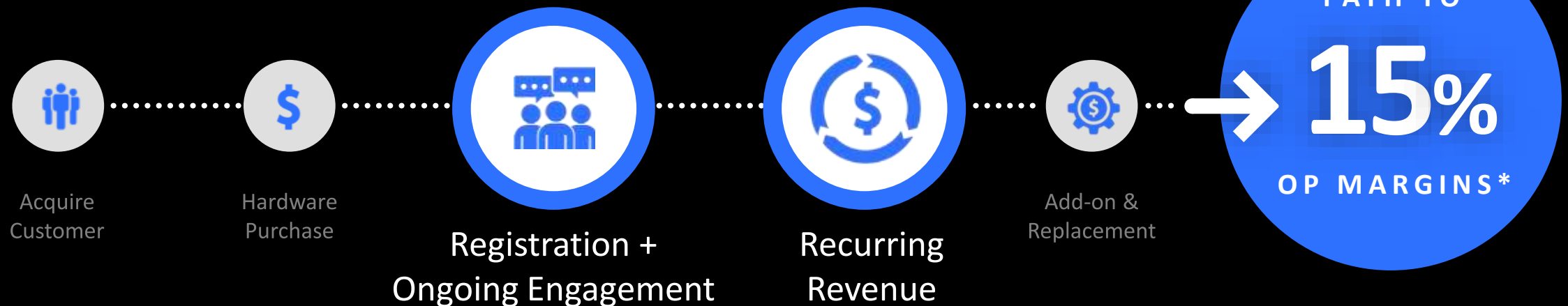
Mesh

The NETGEAR Evolution

FROM A LARGE INSTALLED BASE WITH LIMITED ENGAGEMENT...



...TO A LARGE AND ENGAGED CUSTOMER COMMUNITY



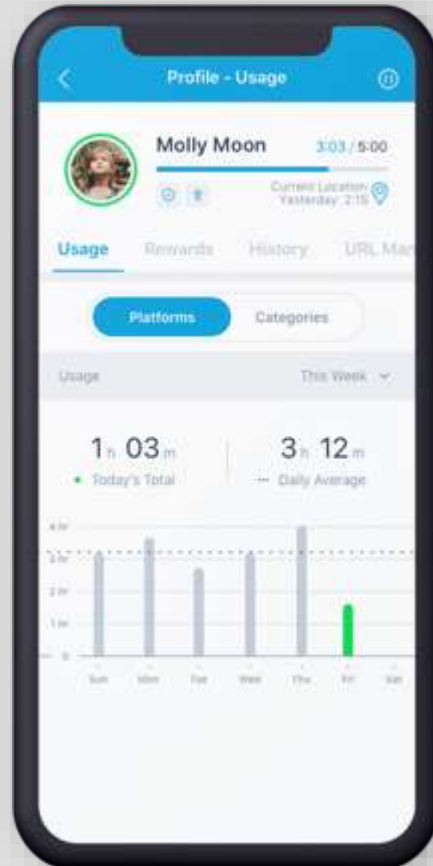
*Non-GAAP

NETGEAR VALUE ADDED SERVICES

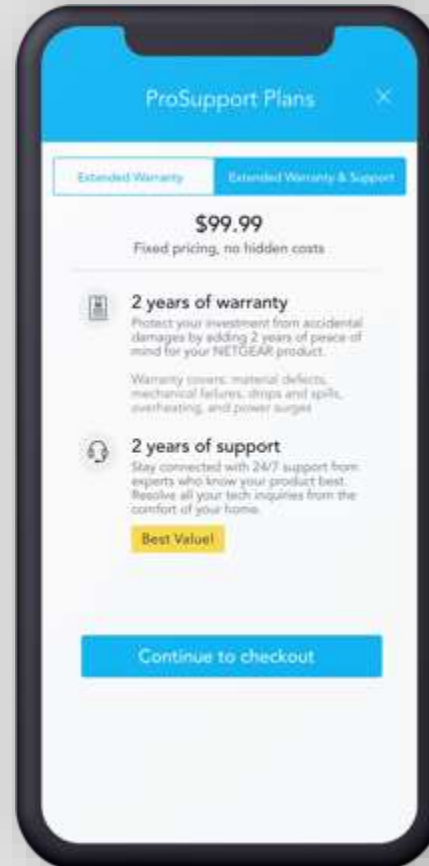
NETGEAR[®]
ARMOR[™]



circle on
NETGEAR[®]



NETGEAR[®]
PROSUPPORT



Meural



NETGEAR[®]
INSIGHT





Connected Home

PRODUCTS AND TECHNOLOGY



BIGGEST REVOLUTION IN WIFI, EVER

WiFi 6

4X Better Performance than WiFi 5

Capacity: More WiFi for more devices

Speed: Fastest WiFi for the gigabit home

Efficiency: Longer battery life for mobile

Backward compatible with 11AC

WIFI 6 LEADERSHIP

WiFi 6

orbi™

NIGHTHAWK®



MESH

ROUTER

RANGE
EXTENDER

CABLE

ORBI MESH WIFI

Forbes

NETGEAR Orbi WiFi 6 AX6000 Review: The Best Mesh Router

Performance - You Get What You Pay For

"Quite simply, the Orbi 6 was streets ahead and it's the fastest mesh system I've ever used. It also has the widest and highest quality coverage I've seen"

NETGEAR®
ARMOR™

circle on **NETGEAR®**



Unparalleled performance & enhanced security with NETGEAR Armor

MEURAL

"Netgear's Meural Canvas II is a 27-inch screen to turn your home into a gallery"

techradar

"Meural's revamped Canvas II wireless photo frame lets you decorate your wall with priceless works of art"

TechHive

Imagine your best photos, at their best.

Beframe the way you display your photography.

Upload, crop, and filter your own images with the Meural app or website. And with the Canvas II's side door, access to ports for SD card upload is quick and easy.



Launched Meural Canvas II (21.5" and 27") at IFA

Awarded "Best of IFA"

Expanding Retail Placements

POWERED BY
NETGEAR

NIGHTHAWK PRO GAMING

Cloud gaming needs low latency WiFi

Greenfield opportunity to create a category



NETGEAR Differentiation

DumaOS gaming software

Best in class WiFi, transition to WiFi 6

\$4.5B

Cloud Gaming
Spending by 2024*



*"5G and New Services Will Push Cloud Gaming Market to US\$4.5 Billion and 42 Million Active Cloud Gaming Users By 2024," ABI Research, 11/13/2019

ARMOR ON ORBI PLATFORM

NETGEAR®
ARMOR

POWERED BY
Bitdefender®



COSTCO
WHOLESALE

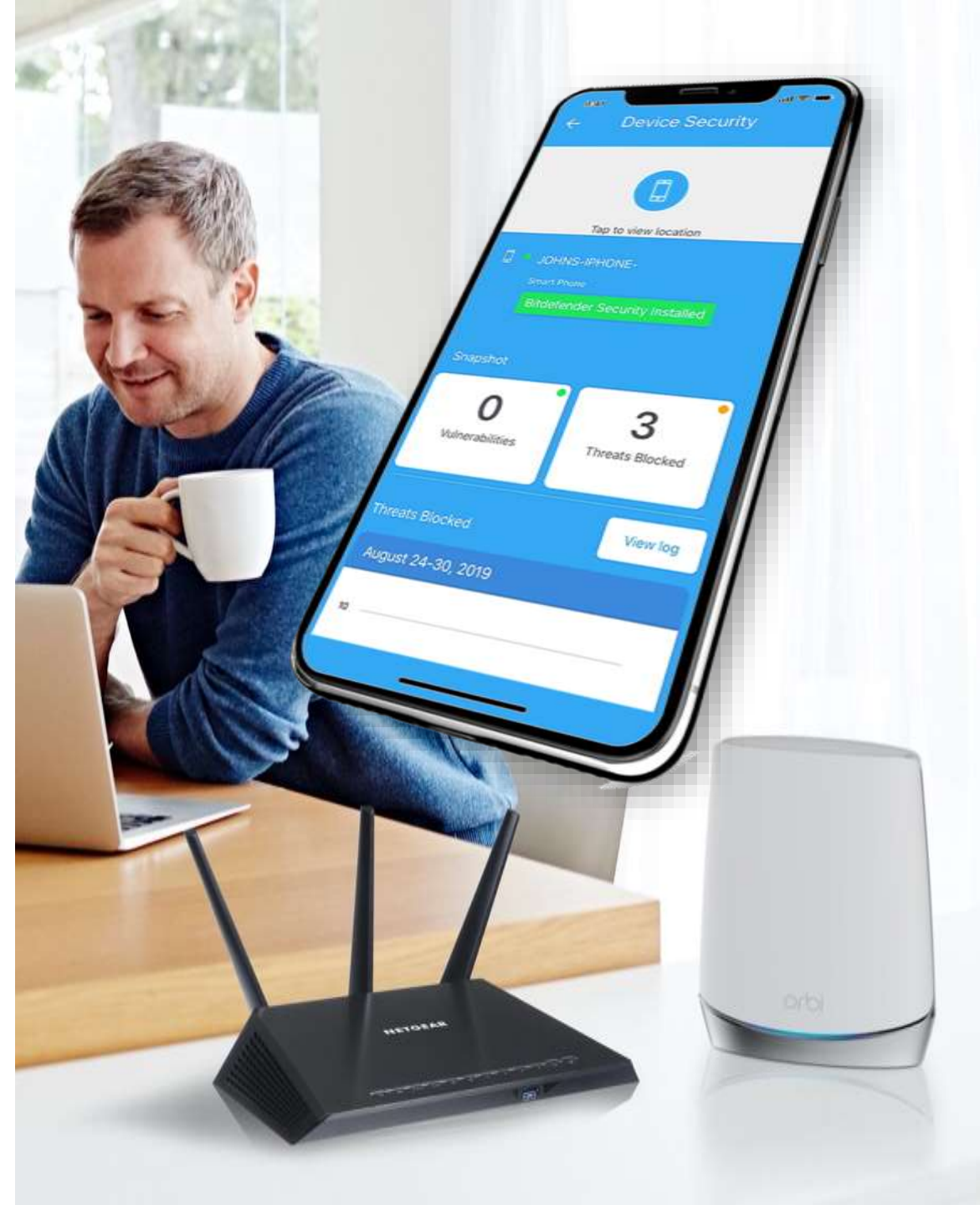


NETGEAR[®]

ARMOR[™]

POWERED BY
Bitdefender[®]

- Subscription \$69.95/year
- Advanced Security on your NETGEAR Router
- Detect and block cyber threats such as phishing, malicious URLs and privacy attacks
- Unlimited device protection
- Notifications to Orbi or Nighthawk App



WiFi 6

CHP Strategy



5G



NETGEAR
ARMOR

circle

Meural

Up ASP with New Technology

Drive New Lifestyle Categories

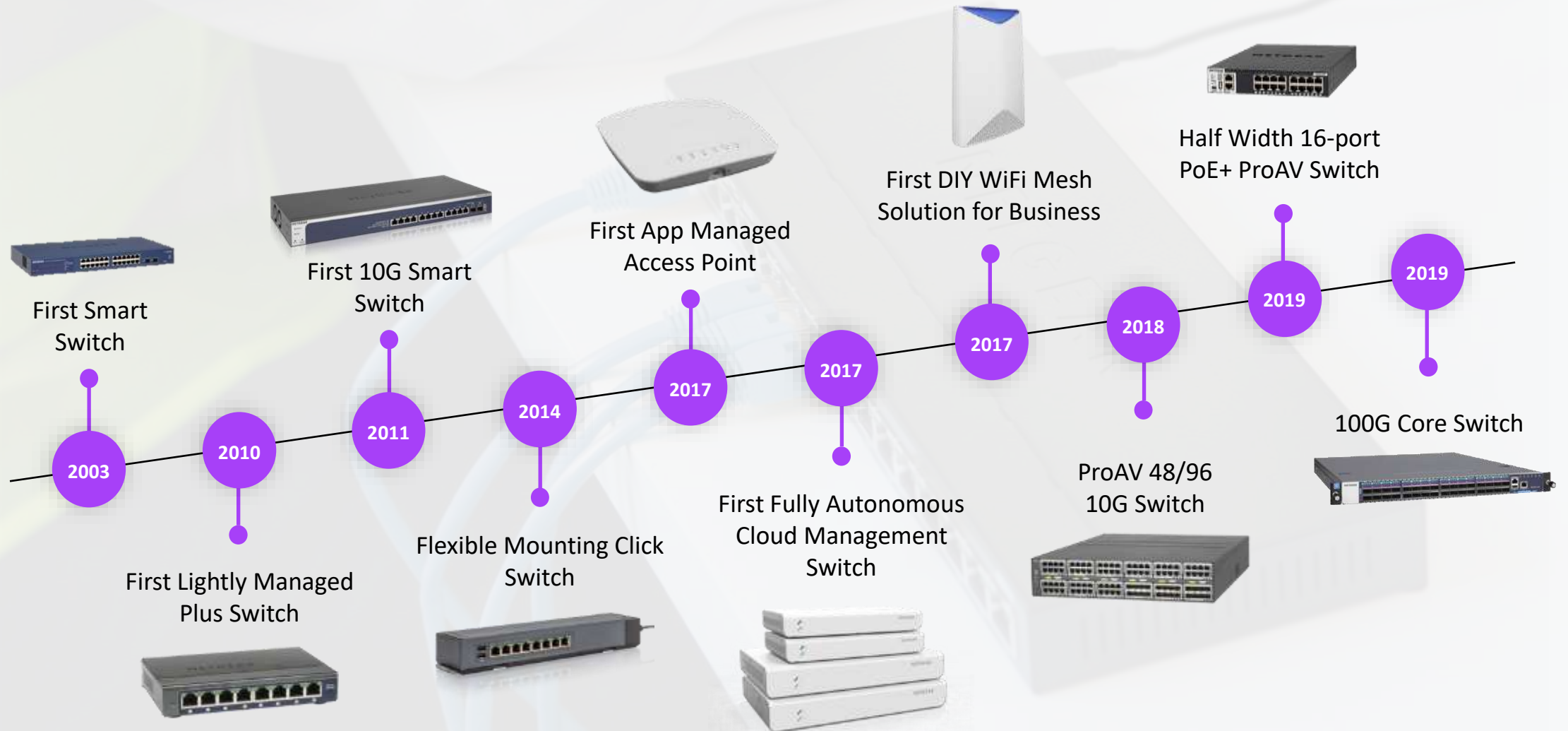
Sell Services



SMB Segment

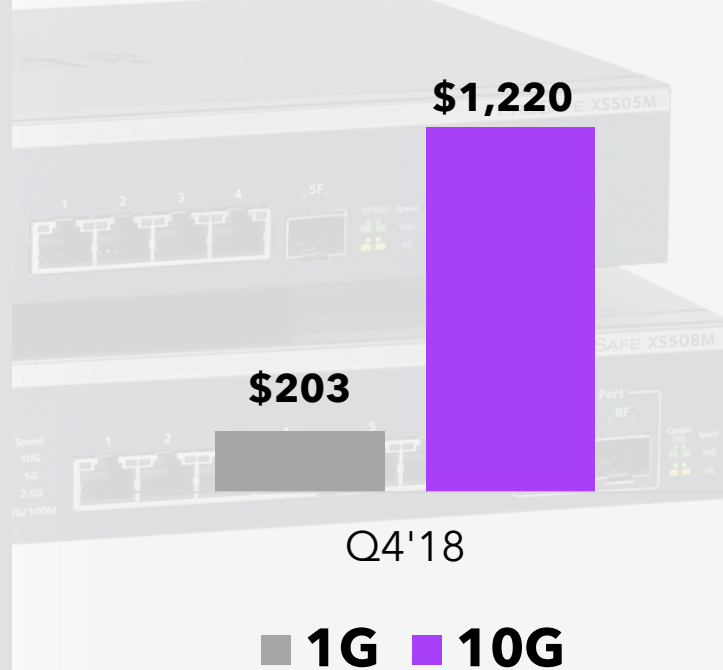
PRODUCTS AND TECHNOLOGY

HISTORY OF INNOVATION IN SMB



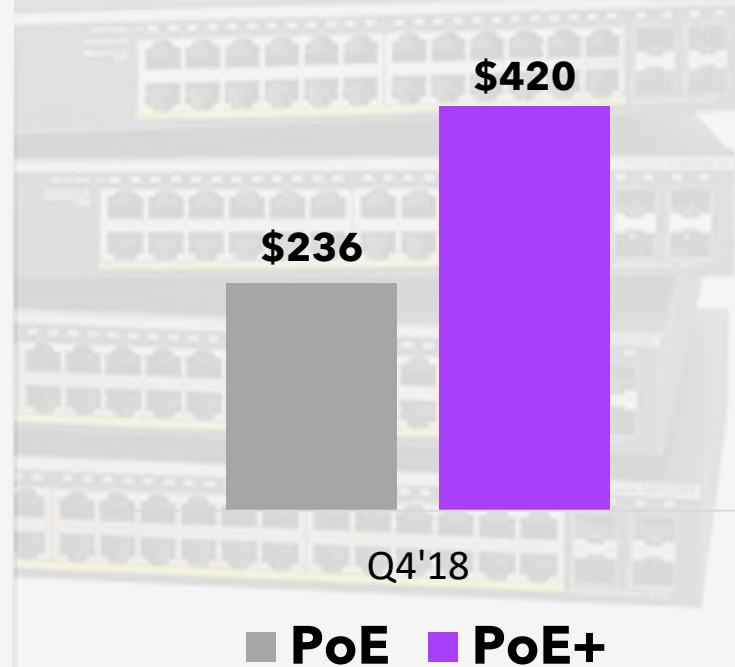
Upgraded Technology > 2x ASP...

Smart Switch Port Speed ASPs



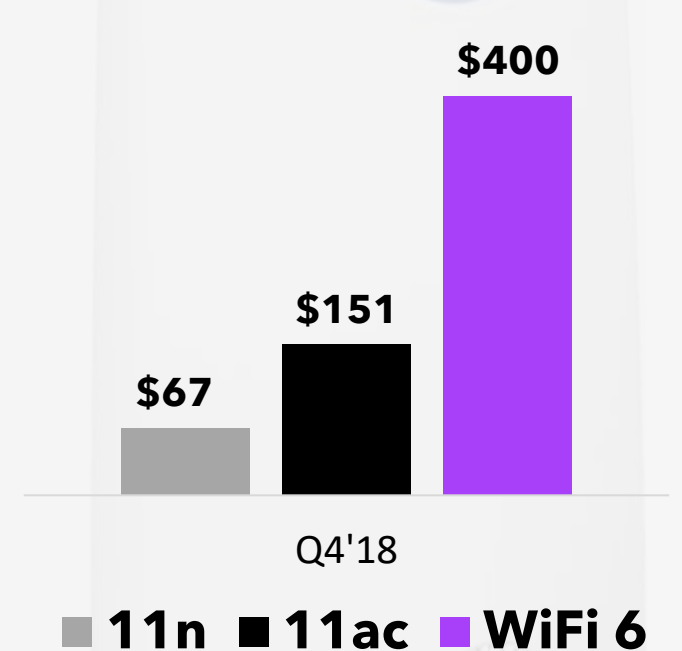
1Gbps → 10Gbps

Smart Switch PoE ASPs



PoE → PoE+

NETGEAR SMB Access Point ASPs



11ac → WiFi 6

PRO AV APPLICATIONS



SPORTS



LARGE EVENT VENUES



EDUCATION



MEDICAL SURGERIES



HIGH-END HOMES



RETAIL SIGNAGE



SMALL & MOBILE EVENT VENUES

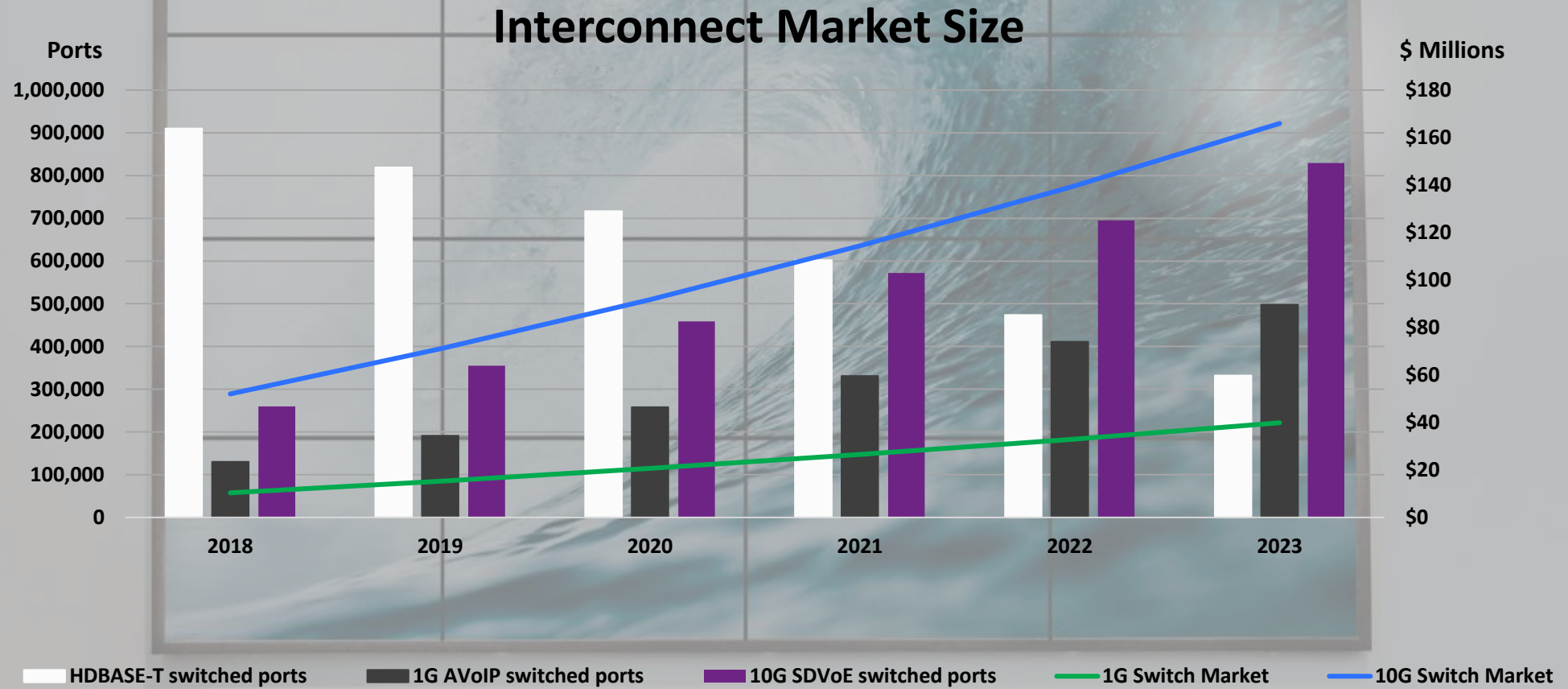


CORPORATE OFFICES



COMMAND & CONTROL CENTERS

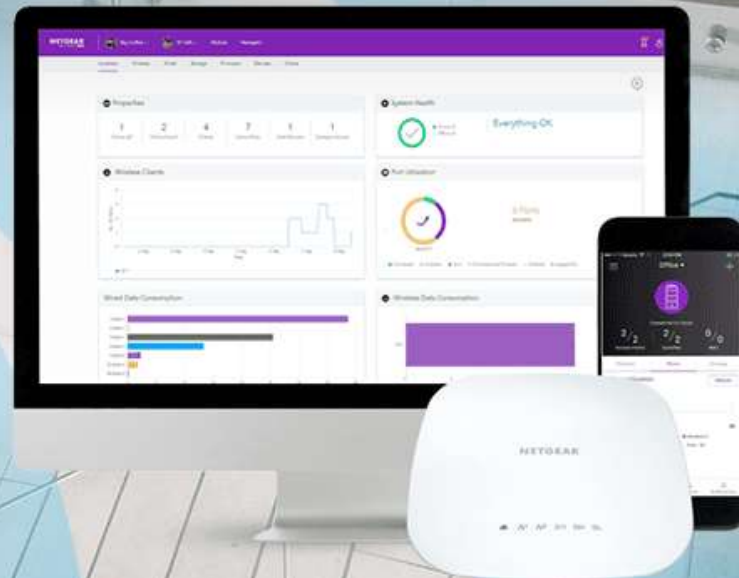
VAST MARKET OPPORTUNITY



Source: SDVoE Alliance market sizing based on FutureSource Consulting's "HDBase-T in AV signal distribution" and AVIXA's IOTA reports.

Do-It-Yourself SMB Networks

orbiTM PRO

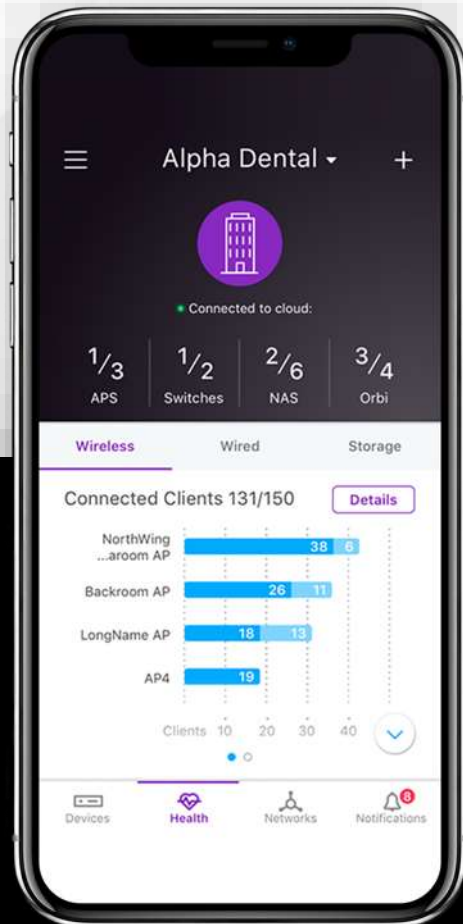


Instant Mesh

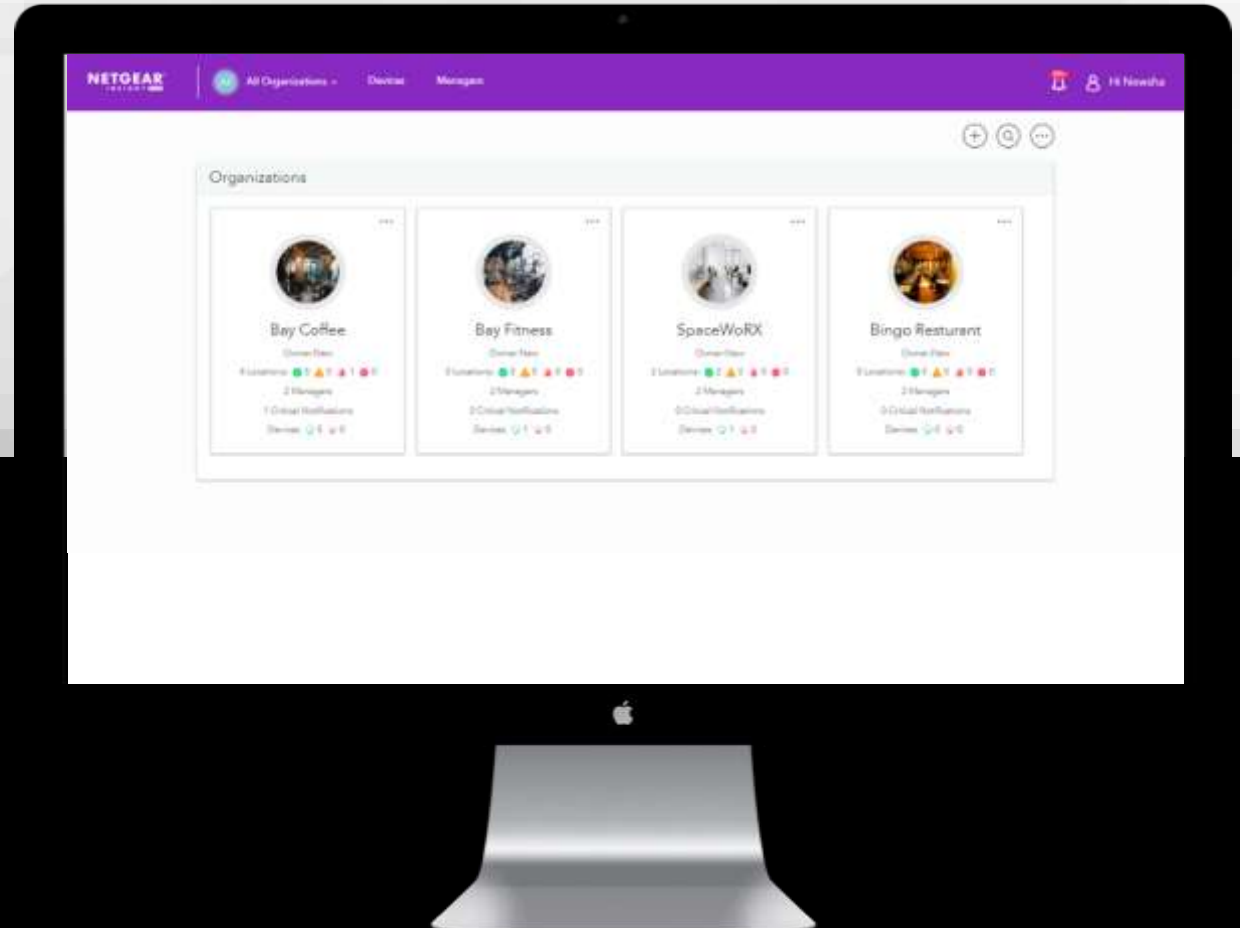
Instant WiFi

Instant Captive Portal

DIY
\$5 per year per device



Managed Service Providers
\$15 per year per device



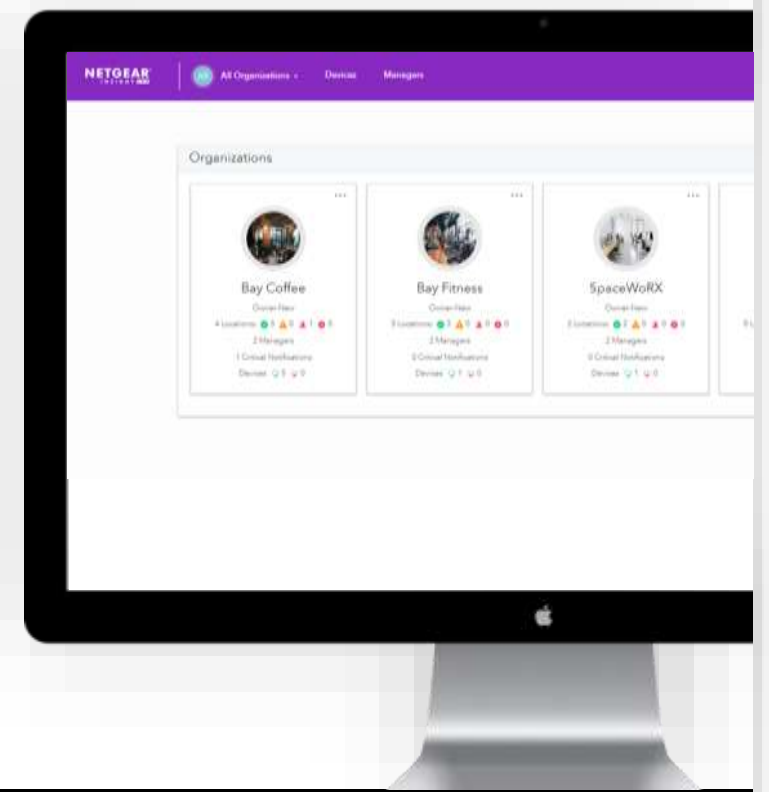
SMB Summary



Up ASP with New Technology



ProAV, Insight Mesh



Insight Services