



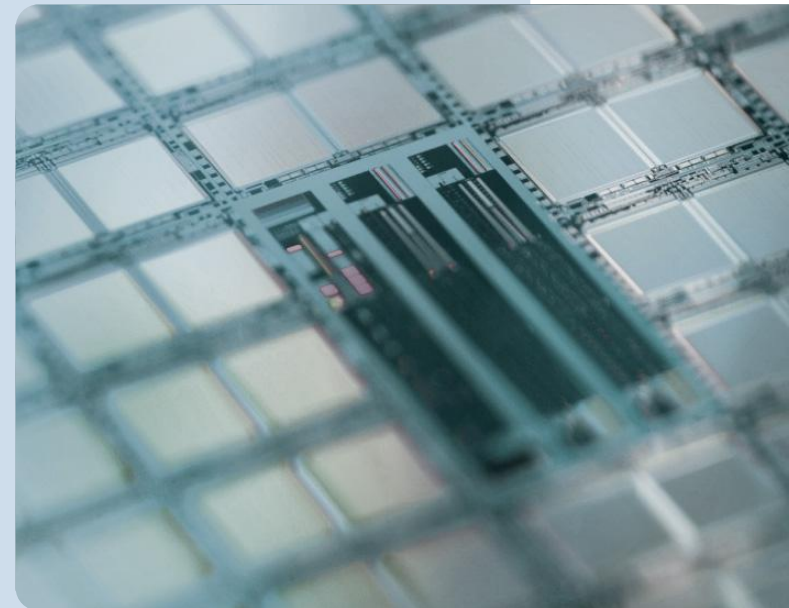
Co-Creating Future...

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Safe Harbor Statement

This presentation may contain forward-looking statements, including those regarding Applied's performance, products, industry outlooks and opportunities. Forward-looking statements are subject to known and unknown risks and uncertainties that could cause actual results to differ materially from those expressed or implied by such statements, including uncertain global economic and industry conditions, demand for electronic products and semiconductors, and customers' new technology and capacity requirements; the concentrated nature of Applied's customer base; and other risks described in Applied's most recent Form 10-Q filed with the SEC. All forward-looking statements are based on management's estimates, projections and assumptions as of May 16, 2013, and Applied undertakes no obligation to update any forward-looking statements.

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AGENDA

Applied Materials Business Overview

Key Trends & Collaboration Opportunities

Next Steps

WHAT WE DO

We make the **equipment** that makes the components that change the world.



Applied's Technology Enabling Tablet PC



Display

Enabled by Applied Materials' PE-CVD, PVD, test, and Roll-to-Roll equipment (>30% of tablet BOM*)

Semiconductor

Enabled by Applied Materials' Silicon Systems equipment - microprocessor
256MB DRAM
16GB MLC NAND Flash
I/O controller
multi-touch controller (>20% of tablet BOM*)

Source: iFixit, UBS, Applied Materials

* Refers to % of Bill of Materials processed by Applied Materials equipment

Enabling and Accelerating Innovation

Applied Materials is the global leader in providing manufacturing solutions for the semiconductor, flat panel display and solar photovoltaic industries

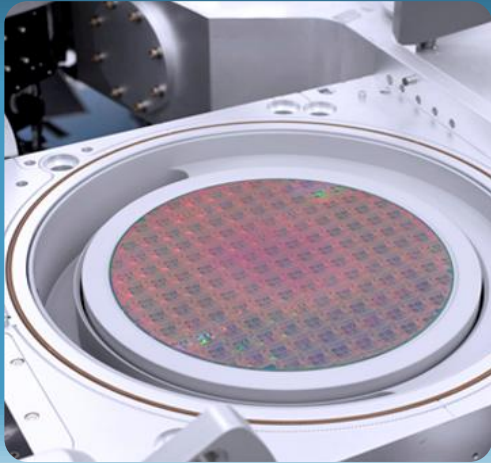
OUR STRENGTHS

- Precision materials engineering
- Commercializing sophisticated systems
- Global reach



The Most Exciting Industries on Earth

Semiconductor



20,000,000x

reduction in
COST PER TRANSISTOR
in 30 years¹

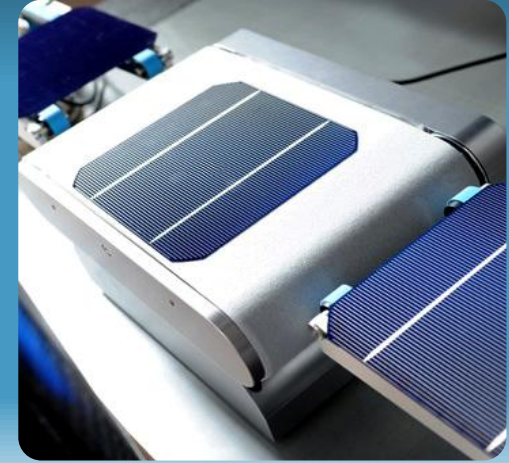
Display



20x

reduction in
COST PER AREA
in 15 years²

Solar



5x

reduction in
COST PER WATT
in 4 years³



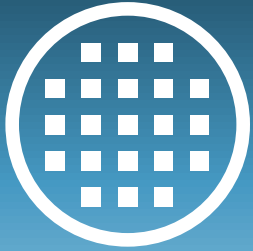
In 1976, a 32GB smartphone
would have cost more than
4 BILLION DOLLARS

1 Source: SIA, IC Knowledge LLC

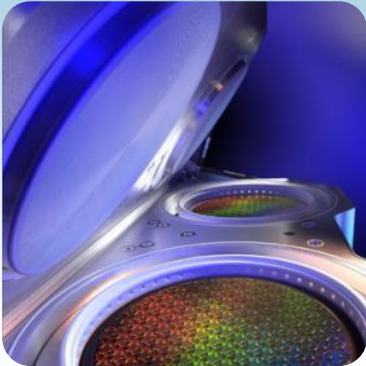
2 Source: Display Search, Nikkei BP, Applied Materials

3 Source: Photon Consulting 2012

Business Segments



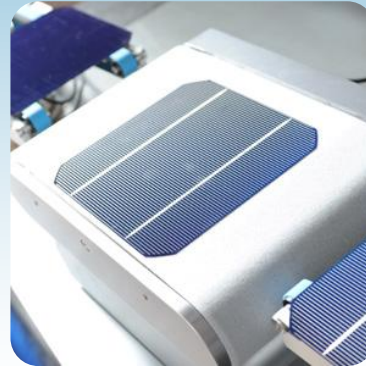
**Silicon Systems
Group**



Display



**Energy and
Environmental
Solutions**



**Applied Global
Services**



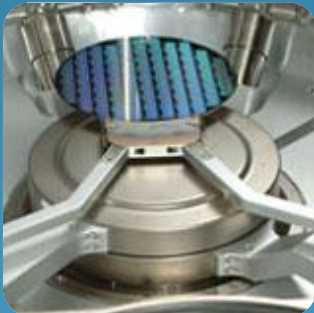
Co-creating future in India

2300 employees, IIT Bby Industry partnership ...& more



Trusted Semiconductor Chip Manufacture

Semiconductor chips integral to electronics vision
Local prototype fab & innovation fab critical for India's fabless sector
Technology sovereignty thru trusted chip manufacture



Solar

Partnering eco-system of R&D, equipment mfg and industry
Define roadmaps, not just follow it, avoiding costly mistakes
Joint advocacy for enabling solar manufacturing sector



Future Products

Super-conducting Fault Current Limiters/ local EPC-indigenization partnership
Solid State Batteries/Li Ion Batteries

Delivering Essential Technology for a Competitive Advantage

Next Steps:

- PSUs to define engagement option in their strategic plans
- F-thru meeting to start developing strategic options
- Joint task force to power collaboration development engine
- DPR/Management buy-ins and rollout plans

We're ready for incredible things.

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