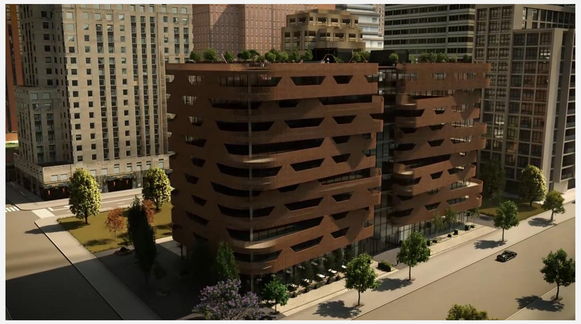
Market Opportunity with NVIDIA per Industry

Industry Overviews

AEC



TAM: 15M users

Segments: Architecture, Engineering (Civil, MEP, Water), Construction

Audiences: Architects, Designers, Engineers, Virtual Design and Construction (VDC) Managers, BIM Managers, Design Technology Managers, Visualization Specialists, CIOs, CTOs, ITDMs.

NVIDIA Solutions: RTX PRO GPUs, Datacenter GPUs, NVIDIA AI Enterprise, Omniverse (Digital Twins), AI Workbench with Blueprints and NIM (for AI development), Metropolis and Cosmos (camera-based AI), fVDB (reality capture), CUDA (general acceleration), CloudXR for raytracing in VR

Key AI Workloads: AI for Design & Construction, Reality Capture, Real Time Raytracing

Market Opportunity:

Together we can optimize AEC workflows with joint solutions and cutting-edge technology that enable architects, designers, engineers, and builders bring innovative products to market faster.

- Professional workflows are becoming more computationally demanding with integration of technologies like Generative AI, real-time ray tracing, reality capture, and immersive XR into AEC workflows.
- Artificial Intelligence (AI): A key growth opportunity exists in applying AI, specifically using LLM RAG for business administration and construction documentation, Diffusion with LoRA for conceptual design, and VLM for construction progress monitoring, predictive maintenance, and facilities management.
- Real Time Raytracing: The demand is high for solutions incorporating RTX with DLSS accelerated high-fidelity raytracing, CloudXR for raytracing in VR, and Omniverse physics-based Digital Twins.
- Reality Capture: Opportunities include the CUDA-acceleration of LIDAR and Photogrammetry, the use of radiance fields (Gaussian Splats), and leveraging AI for segmentation, classification, and object detection.
- Limits of Traditional Computing: Exploding data and complex collaboration demands are exposing the limits of traditional computing for design, engineering simulation, visualization, and AI.
- Technology Leaders' Decision: AEC technology leaders face a flood of tools from legacy vendors and startups, requiring them to decide what to buy, build, or integrate in-house.

Customer Challenges:

- **Waiting:** I have to run my simulations and renderings overnight because they take so long and use up all my computer's power—I can't even work on anything else simultaneously.
- **Crashing:** I constantly put in extra effort trying to optimize file size and reduce complexity just to get reasonable performance, and even then, the file sometimes crashes.
- **Poor Productivity:** I spend more time waiting and doing workarounds than I do creating great work.

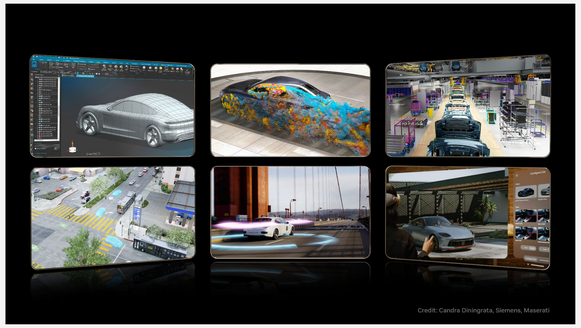
Industry Events

Digital Built World (Mar | Sydney)
Datacenter Dynamics Connect (Mar | New York)
NXTBLD NXTDEV (May | London)
AIA Conference on Architecture & Design (Jun | San Diego)
SIGGRAPH (Jul | LA)
Autodesk University (Sept | Las Vegas)
Esri IMGIS (Oct |Palm Springs)
BST Global AI Summit (Nov | Palm Beach)

Paid Media Publications

AEC Magazine; Architect Magazine; Architectural Record; CG Architect; Civil Engineering Magazine; Construction Today; ENR

Automotive



Segments: Automotive OEMs, Software/Platform providers, Tier 1 Suppliers, AV Ecosystem Partners, CSPs, ISVs

Audiences: Business Leaders / Executives, Software & Hardware System Architects, Researchers, Developers, Data Scientists, Engineers, Consumer/End Users

NVIDIA Solutions:
- NVIDIA DRIVE Hyperion, AGX Orin/Thor, DriveOS
- NVIDIA Halos
- NVIDIA Alpamayo
- MediaTek Dimensity (built on NVIDIA)
- NVIDIA DGX
- NVIDIA RTX 6000 PRO
- NVIDIA OVX with Omniverse and Cosmos

Key AI Workloads:
Product
- Autonomous Vehicles Training, Simulation, Validation, and Deployment
- In-car/Connected Vehicles inc. Monitoring and Intelligent Interactions
- Design, Simulation, & Engineering

Manufacturing
- Factory Planning / Digital Twin
- Factory Operations incl. Robotics

Business Opps (GenAI, Agentic AI, Enterprise AI)
- Supply Chain, Logistics, & Warehousing
- Aftermarket and AI Agents for Customer Service

Market Opportunity

Automotive is undergoing a major shift, creating significant demand for AI, simulation, and accelerated computing. NVIDIA delivers end-to-end platforms—from design and engineering to manufacturing and autonomous driving—that enable the future of AI-defined vehicles.

Customer Challenges:

- Autonomous Driving: Safe, scalable AV deployment requires massive data, simulation, and in-vehicle compute. Developers face rising costs, pressure to deliver advanced features, and strict safety and regulatory demands— while real-world data collection and physical testing remain expensive and risky.
- Design & Engineering: Disconnected toolchains and siloed data slow innovation.
- Manufacturing: Traditional systems lack real-time visibility and flexibility.

Key Themes / Use Cases:

- **L4 robotaxi platform:** NVIDIA DRIVE Hyperion is the reference architecture for Level 4 robotaxi programs, standardizing sensor and compute hardware across vehicle form factors and unlocking fleet-scale data sharing.
- **Full-stack AV development:** Production AV requires a connected pipeline from data to deployment. Alpamayo provides the open reasoning stack for training and distilling on-vehicle models, while Cosmos, NuRec, OmniDreams, AlpaSim, and AlpaGym deliver the closed-loop simulation and validation infrastructure that reduces physical testing.
- **AV safety:** NVIDIA Halos is the full-stack safety system for autonomous vehicles, unifying hardware, software, and AI safety across training, development, and deployment.
- **In-vehicle AI:** OEMs are moving from cloud-only assistants to hybrid edge and cloud experiences across cockpit, connected vehicle, and ADAS. NVIDIA AI Box, CX-1, and Orin/Thor enable multimodal in-cabin AI and low-latency edge inference, with partners including Cerence, SoundHound, and Amazon Alexa+.
- **Design, engineering, and manufacturing:** Disconnected toolchains and manual processes slow vehicle development and factory operations. NVIDIA Omniverse, Isaac, and Metropolis accelerate CAE workflows, enable operational digital twins, and bring AI-driven automation to factory planning, safety inspection, and robotics.

Industry Events

Computex (June | Taiwan)
CVPR (June | Denver)
SIGGRAPH (July | Los Angeles)
ECCV (Sept | Sweden)
Safecomp (Sept | Spain)
IAA Transportation (Sept | Hannover)
GTC (Oct | Berlin)
Digitalize in Stockholm (Nov | Sweden)
GTC (Dec | Washington D.C.)
NeurIPS (Dec | Atlanta)
CES (January | Las Vegas)
GTC (March | San Jose)

Paid Media Publications

AutoBlog, Auto Connected Car News, Auto Futures, Automotive News, Automotive World, Bloomberg, Car & Driver, CNET, Digitimes, EE Times, Electrek, Forbes, Fortune, Gasgoo, Handlsblatt, Just Auto, MotorTrend, Reuters, TechCruch, The Verge, Tom's Hardware, VentureBeat, WardsAuto, WSJ, ZDNet

Analysts: 451 Research, Gartner

NVIDIA

Energy



TAM: Over $17B | Subsurface Operations: $2B+; Power & Utilities: $11.5B+; Surface Operations: $3.5B

Segments: Subsurface (Oil & Gas) Operations, Power & Utilities, Surface Operations

Audiences: **Technical**: Geoscientist/physicist, Petroleum Engineer, Reservoir Engineer, Software Engineer, Data Scientist; **ITDM**: CTO, CIO, Director of IT; **LOB**: SVP/VP of Engineering, SVP/VP of Strategy & Innovation; **Utilities**: Grid Asset Manager, T&D Operations Manager, Public Utility Commissioners

NVIDIA Solutions:
SW: NVIDIA DSX, NVIDIA AI Enterprise (NeMo, PhysicsNeMo, CUDA-X, HPC SDK, Omniverse, cuOpt, cuDSS, Earth-2)
HW: Data Center Platforms (B200, B300, GB200), DGX Spark, DGX Station, RTX PRO GPUs

Key AI Workloads:
Oil & Gas Operations: Seismic Processing, Reservoir Simulation, Geoscience & Engineering AI Agents
Power & Utilities: Grid Interconnection Planning, Outage Management, Distribution Management, Power Trading, Price Forecasting
Surface Operations: AI-Accelerated Licensing & Regulatory Support, Digital Twin-Based Design Optimization & Validation, AI Agents for Operations & Maintenance

Market Opportunity:

The convergence of AI, accelerated computing, and digital twins is reshaping energy operations, unlocking new value across exploration, production, grid management, and emissions reduction while improving efficiency and resilience. At the same time, the rise of AI factories is driving unprecedented demand for reliable, low-carbon power and hybrid compute infrastructure, positioning energy companies and technology providers at the center of a rapidly expanding, interdependent AI–energy ecosystem.

Customer Challenges:

Subsurface (Oil & Gas) Operations:
- Run large-scale seismic imaging and reservoir simulations without cloud latency or vendor lock-in
- Transform massive subsurface datasets into actionable insights with predictive modeling and agentic AI
- Capture tribal knowledge and augment retiring workforce through AI-driven decision support

Power & Utilities:
- Modernize aging grid infrastructure with physics-based digital twins for planning, operations, and predictive maintenance
- Use renewable and demand forecasting to improve grid reliability and enable AI factory energy ecosystems
- Deploy AI at edge for real-time grid optimization, safety monitoring, and compliance in regulated environments

Surface Operations:
- Improve safety and availability through AI-accelerated licensing, regulatory support, and predictive maintenance
- Advance digital twin-based design optimization and validation at scale
- Deploy AI agents for autonomous operations and maintenance support

Industry Events

DISTRIBUTECH (Feb | San Diego)
CERAWeek (Mar | Houston)
Hannover Messe (Apr | Hannover)
EEI (June | Las Vegas)
EAGE Annual (June | Aberdeen)
London Action Climate Week (June | London)
IMAGE (Aug | Houston)
CIGRE (Aug | Paris)
AWS Energy Symposium (Sept | Houston)
GTC Berlin (Oct | Berlin)
ADIPEC (Nov | Abu Dhabi)

Paid Media Publications

Power & Utilities: Canary Media, Energy Digital (utilities section), Grid Forward Chats, Latitude Media, POWER Magazine, Power Engineering, POWERGRID International, Public Power Magazine, Renewable Energy World, Tech Brew, Today in Energy, US Energy Association, Utility Dive

Oil & Gas: Offshore Magazine, Oil & Gas Journal, Oilfield Technology, Rigzone, S&P Global, The American Oil and Gas Reporter, World Pipelines, World Oil

Financial Services



TAM: $82 Billion

Segments: Trading, Banking, Payments

Audiences: **Line of Business:** President, Head of AI, Head of Data Science, Head of Research, Product Management Lead, Director of AI Research, **IT/Infrastructure Leaders:** CIO, CTO, CISO, VP/Head of AI Infrastructure, VP/Head of DevOps, Head of Engineering, **AI Executives:** Chief AI Officer, VP/Head of AI/Data Science, VP/Head of ML, **AI/IT Teams/Practitioners:** Data Scientist, Developer, Engineer, MLOps, DevOps, IT Architects, Sys Admins, IT Admins, IT Infrastructure, Network Engineers

NVIDIA Solutions: NVIDIA AI Enterprise, NIM, CUDA-X Data Science (RAPIDS, Spark), NVIDIA NeMo, Dynamo-Triton, HPC SDK, Morpheus, TensorRT-LLM, NVFlare, cuDNN, H100, Blackwell, DGX SuperPod, NVIDIA AI Blueprint for Financial Fraud Detection, cuFOLIO (Quantitative Portfolio Optimization developer example), AI Model Distillation for Financial Data developer example, Transaction Fraud Detection developer example

Market Opportunity:

The financial services industry (FSI) is undergoing a rapid transformation driven by technological advancements and evolving customer expectations. In this dynamic landscape, financial institutions are seeking innovative solutions to overcome challenges, enhance operational efficiency, and deliver superior customer experiences.

Customer Challenges:

Banking and Payments

- Scalable Infrastructure: Crucial for training and deploying models to keep up with increasing demands.
- Data Mobility: Transferring large amounts of data between repositories delays responsiveness.
- AI Pipeline Efficiency: Data transformations bottleneck the pipeline, limiting operational flexibility.

Trading

- Data Relevance: Outdated data affects the quality of insights.
- Data Diversity: Datasets exist in various formats and locations.
- AI Pipeline Efficiency: Data transformations bottleneck the pipeline, limiting operational flexibility.

Use Cases:

- **Trading:** Algorithmic trading (research, execution)
- **Banking:** Customer Service (Experience & Personalization), Fraud & Financial Crime (Credit Card, Check, KYC/AML), Equity research assistant, coding assistant, financial advisor assistant, portfolio management
- **Payments:** Transaction fraud detection, agentic commerce, customer service, personalization, Payments Optimization

Industry Events

Money20/20 EU (June | Amsterdam)
SIBOS (Sept | Miami)
Money20/20 US (October | Las Vegas)
NeurIPS (December | Sydney)

Paid Media Publications

Trading: Bloomberg, Risk.net, Waters Technology, Financial Times, The Journal of Finance and Data Science, Portfolio Management Research
Banking: American Banker, Bank Automation News, Banking CIO Outlook, Banking Dive, Bank Tech, Digital Banking Report, The Banker
Payments: FinTech Magazine, PYMNTS, Payments Journal, TechCrunch, Fintech Weekly, Fintech Today, Finovate, Fintech Futures

Global Public Sector / Sovereign AI



TAM: $ Multi Trillion

Audiences: NCPs, Gov't Officials/Heads of State/Head of Technology and Innovation, AI startups/ISVs, Sovereign LLM builders/developers, public AI research centers, GSIs/SDPs targeting this jurisdiction

NVIDIA Solutions: NV AI Enterprise, NVIDIA AI Factory, Data Center GPUs (Blackwell, DGX, A100, HGX, H100, GB300, etc)

Primary focus - Sovereign LLMs | Sovereign AI

Key AI Workloads: Agentic AI/Gen AI, Geospatial, Sustainable Computing, Data Analytics, Signal Processing, Quantum Computing

Market Opportunity:

Over $1 trillion in publicly declared sovereign AI investments are underway globally, with governments across democracies building domestic AI infrastructure to strengthen economic competitiveness and national resilience. NVIDIA and our partners enable governments to develop secure, sovereign, and scalable AI capabilities—from foundational models and data pipelines to AI factories and edge deployments—unlocking citizen services innovation, accelerating decision-making, and establishing technological independence across all government sectors while maintaining data sovereignty and local control.

Customer Challenges:

- **Data sovereignty, residency, and compliance -** Keeping sensitive government and citizen data within national borders while still using scalable cloud or hybrid infrastructures is complex and often the single biggest blocker. Agencies must navigate overlapping privacy, security, and AI regulations (for example GDPR and emerging AI acts), with strict auditability and transparency requirements for LLMs.
- **Cost, scale, and infrastructure for training and serving-** Training and operating large models at sovereign scale requires sustained, large capital outlays for compute, storage, and energy that many governments struggle to fund and coordinate. Deciding between training from scratch versus adapting existing models (build vs. borrow) has major implications for cost, time-to-value, and long-term control.
- **Local language, culture, and data scarcity -** Many countries lack large, high-quality corpora in local languages and dialects, making it difficult to produce accurate, culturally aligned sovereign LLMs. Collecting, cleaning, and labeling domain-specific public sector data (legal, healthcare, citizen services) at scale is slow and resource intensive.
- **Trust, safety, and bias management -** Governments face strong pressure to ensure LLMs are unbiased, explainable, and aligned with local legal and ethical norms, especially in high-risk use cases. Implementing continuous monitoring, red-teaming, and guardrails to manage hallucinations, misinformation, and harmful content is an ongoing operational burden.
- **Talent, operating model, and ecosystem maturity-** There is often a shortage of in-country AI engineers, MLOps talent, and policymakers capable of designing, deploying, and governing sovereign LLM programs at scale. Coordinating across ministries, national labs, cloud providers, and local startups to build a sustainable sovereign AI ecosystem demands new governance and procurement models.

Industry Events

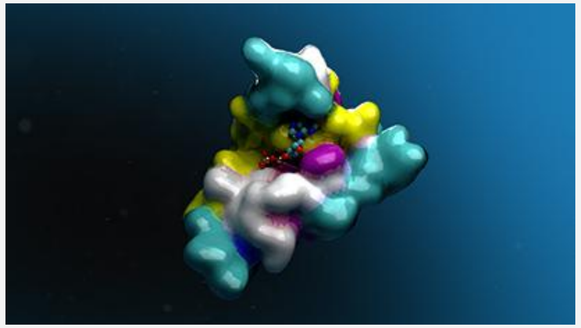
Computex / GTC Taipei (June | Taiwan)
AI For Good (July | Switzerland)
GTC Berlin / Sov AI Forum (Oct | Germany)

Media Publications

Regional - led in EMEA, APAC, LATAM

NVIDIA

HCLS



TAM: $206+ Billion

Segments: BioPharma, Medical Imaging, Medical Devices & Robotics, Genomics, Digital Health

Audiences: AI researchers/foundation model builders, Platform developers, data scientists, Technical & Executive: CxO, VP/GM of Product Lines, R&D Dept. Heads, IT Leads, CTO, CMO (Medical)

NVIDIA Platforms: BioNeMo, Isaac for Healthcare, MONAI, Holoscan, Parabricks, CUDA-X Data Science (RAPIDS), CUDA-X Libraries, IGX, DGX, RTX, Nemotron, NeMo, Dynamo

Key AI Workloads: Bio LLM Training, Bio LLM Inference, Biomedical Imaging, Medical Imaging Reconstruction, Clinical Inference, Healthcare Robotics, Short Read/Long Read Sequencing, Single-Cell Omics, Spatial Omics

Market Opportunity:

Digital Biology - accelerating genomics and biopharma R&D with generative AI, multi-scale biology, molecular simulation, self-driving labs, digital twins and biomanufacturing.

Digital Health - reimagining clinical care and research with AI agents that reduce administrative burden, close care gaps, improve care operations, and optimize clinical trials

Digital Devices - redefining diagnostics and treatment with AI-powered imaging, simulation-trained robotics and real-time surgical guidance.

Customer Challenges:

- **BioPharma:** Need to customize and deploy SOTA large generative AI models over multiple GPUs and nodes that will help them to speed up drug discovery pipelines and reduce cost
- **Imaging:** Need a high-quality, easy-to -use and customizable AI development and deployment framework—with domain optimized support for medical imaging modalities and open models to accelerate innovation while meeting regulatory requirements
- **Devices:** Need low-latency front-end sensors, high-speed interconnects, and flexible, multi-processor system architectures. At the same time, they face high entry barriers—regulatory demands, cost, and adoption—driving demand for strong partner ecosystems.
- **Genomics:** Need to augment on-and near-instrument bioinformatics workflows with faster analytics that come with higher accuracy, lower cost, and improved energy efficiency**.**
- **Digital Health:** Need scalable AI to power remote monitoring and clinical decision support. Key challenges include data integration, privacy compliance, real-time insights, and cost control.

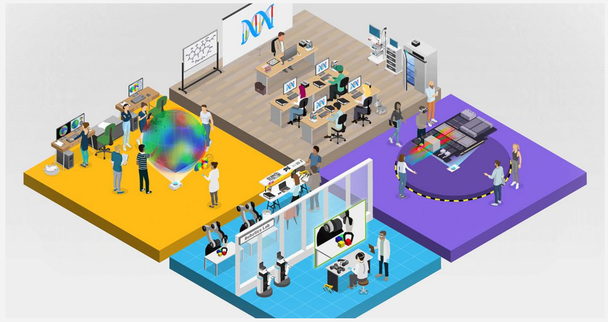
Industry Events

Computex (May | Taiwan)
Hamlyn (June | France)
ISMB (July | D.C)
ACS Fall (August | Chicago)
MICCAI (Sept | South Korea)
Supercomputing (Nov | St. Louis)
NEURIPS (Dec | San Diego)
JPMorgan Health (Jan | San Francisco)

Paid Media Publications

HCLS: Healthcare Business Today, Healthcare Weekly, Forbes, MedCity News, Healthcare Dive, Fierce Healthcare, STAT
Pharma: FiercePharma, Gen News, The Medicine Maker
Imaging: Radiology Business, Imaging Technology News, AuntMinnie
Genomics: GenomeWeb, Nature Biotechnology, NEJM, Bio-IT World
Digital Health: Healthcare IT News, HIT Consultant, HealthTech Magazine

Higher Education



TAM: $1+ Billion

Segments: AI for Science, Gen AI, Simulation & Modeling, Health and Life Sciences, Edge AI, Data Science

Audiences: University Decision Maker, Researcher, Educator, Student

NVIDIA Solutions: DGX Spark, DGX B200, DGX H100 SuperPOD/POD, NGC, NVIDIA AI Enterprise/LaunchPad, NVIDIA RTX, NV AI Enterprise, RTX Pro, Jeston Nano Super, Jetson Thor

Key AI Workloads: BioNeMo, Earth-2, Isaac Lab, Quantum Platform, NVIDIA AI Enterprise, PhysicsNemo

Priority Research Areas: Robotics (Cosmos & Isaac Lab), Weather & Climate (Earth-2), Healthcare & Life Sciences (Structural Biology, Single-Cell), Quantum, Materials Science (ALCHEMI), GenAI (Inference, Foundation Model Training)

Market Opportunity:

Together, we can help build awareness and position NVIDIA #1 solution to accelerate workloads for AI researchers, future proof universities and prepare next gen workforce.

Customer Challenges:

Department leads/Dean AND Directors of new Data Science and AI Institutes:

- **Limited Access to Cutting-Edge Technology:** Current infrastructure lacks the latest AI and data science tools, hindering research.
- **Scalability Issues:** Existing systems struggle to scale with growing user numbers and project complexity.
- **Interdisciplinary Collaboration:** Siloed resources make it hard to collaborate across departments.
- **Compliance and Security:** Meeting strict security and compliance standards for sensitive data.
- **Training and Support:** Ongoing training needed for faculty and students to use advanced computing resources.

Targeted Research Principal Investigator:

- **Time to Results:** Slow processing and limited compute delay research and publication.
- **Funding Competition:** Intense competition for limited research funding.
- **Data Privacy and Security:** Protecting and ensuring compliance for research data.
- **Collaboration with Industry:** Mismatched technology hinders industry collaboration.
- **Resource Allocation:** Balancing compute resources among multiple projects.
- **New Tools/Applications:** Learning and integrating new tools and applications.
- **Memory and Storage:** Increased need for more memory and storage.

Graduate / PhD Student

- **Access to Resources:** Limited high-performance computing hinders research.
- **Learning Curve:** Steep learning curve for new AI and data science tools.
- **Career Readiness:** Ensuring skills are job-market relevant.

Research IT

- New demand requires more compute
- Not enough memory and storage

How NVIDIA Hardware & Software Can Help

- **Accelerated Research & Results:** NVIDIA GPUs, DGX systems, and CUDA-based platforms deliver state-of-the-art compute, drastically reducing time to insights and publication.
- **Scalable Infrastructure:** Flexible deployment options—from cloud-integrated research environments to on-premises DGX clusters—adapt easily as projects and teams grow.
- **Collaboration Tools:** Platforms like NVIDIA Omniverse enable seamless, real-time collaboration across departments, institutes, and even external partners, breaking down silos.
- **Training & Ecosystem Support:** NVIDIA Deep Learning Institute (DLI) and AI education resources empower students and faculty with hands-on courses, certifications, and tutorials, bridging the tech skills gap.

Industry Events

Educause (Oct | Nashville)
GTC DC (Oct | DC)
NEURIPS (Dec | San Diego)
CES (Jan | Las Vegas)
ISC (June | Hamburg)
SIGGRAPH (July | Los Angeles)
Supercomputing (Nov | Illinois)

Paid Media Publications

The Chronicle of Higher Education; IEEE; ACM; TechTarget

NVIDIA

Local Government & Smart Cities



TAM: $100 Billion (Global)

Segments: Cities and Roadways, State and Local Government; Airports; Seaports; Stadiums/Venues; Education and Business Campus, Critical Infrastructure

Audiences: CIO, CTO, CDO, Head of Security, Head of AI, CISO, City Officials, Depts of Transportation, Law Enforcement, Emergency Management, Port Authorities, Urban Planning

NVIDIA Solutions: AI Software (Metropolis, NVIDIA AI Enterprise, Omniverse, RAPIDS, Spark, Merlin, cuOpt, Riva, Isaac, NIMs), A30, L4, A100, Jetson, NVIDIA-Certified Systems, EGX Platform w/ A10, A100 GPUs

Key AI Workloads: Intelligent Video Analytics, LLM, Gen AI, Edge AI, NIMs, Simulation/SDG, HPC + AI, NIMs, RAGs

Market Opportunity:

NVIDIA and our rich ecosystem of software and hardware partners are helping cities and enterprises harness AI to enhance safety, sustainability, citizen experience and operational efficiency

- Cost reduction through automation of key processes
- Enhanced security and safety across operations through Intelligent Video Analytics (IVA)
- Reduced operational downtime through predictive maintenance
- Increased employee efficiency through more informed decision making and better resource allocation
- Accelerate processing of enormous amounts of data

Customer Challenges:

- Time and complexity to deploy AI solutions
- Update legacy infrastructure and existing install base of cameras for AI capabilities
- Ensure public safety and/or security of high-value physical assets
- Reduce operating costs while increasing operational efficiency
- Provide citizens and residents easy access to city data and services through LLM/RAGs

Deployment-Ready/Packaged Vision AI Solutions

NVIDIA is partnering with distributors and solution aggregators to offer validated solutions with key OEMs and AI software partners for common use cases across industries.

- Validated hardware+software bundles enable customers deploying across smart spaces, including cities, roadways, airports, stadiums, campuses, seaports, and more.
- Components include an NVIDIA GPU or discrete GPU embedded into systems, including workstations and servers plus an ISV software application.
- Repeatable solutions that have been validated on different sized hardware platforms to accommodate customer deployments.

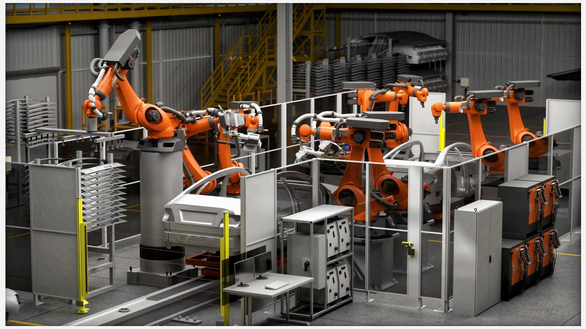
Industry Events

Smart City Expo World Congress (Nov | Barcelona)
ISC West (March | Las Vegas)
Smart City Connect (March | Raleigh)
Tomorrow.City (April | West Palm Beach)

Paid Media Publications

N/A

MFG & Industrial



TAM:
Digital Engineering: > $3B
Smart Manufacturing & Logistics: > $5B
Industrial Operations: >$1B

Segments: Digital Engineering, Smart Manufacturing, Supply Chain & Transportation, Industrial Field Services, Semiconductor Design

Audiences: Executives: CxO, EVPs of Product Lines: Business Unit leads: VPs, Sr Dir (R&D, IT, Engineering) Influencers and End Users (Engineering Managers, Designers, Engineers, CAE Experts, Rendering/Visualization Specialists, Production & Quality Engineers, Supply Chain & Logistics Managers, Developers, AI Practitioner, Data Scientist)

NVIDIA Solutions: CUDA-X Libraries, NVIDIA AI Enterprise, NVIDIA Omniverse, NVIDIA Metropolis, Isaac SIM, NVIDIA Certified Systems - NVIDIA RTX Desktop/ Mobile, Data Center, Jetson, Holoscan

Key Workloads: Factory Planning, Digital Twins, Engineering Simulation, Autonomous Operations, Robotics, Industrial Inspection, Rendering & Visualization, Route Optimization, EDA

Market Opportunity:

Harness AI breakthroughs in design, engineering, simulation, production, remote collaboration, and visualization to revolutionize product development, transform engineering, and power the factory of the future.

- Smart and connected products leading to more computationally demanding workflows with larger datasets
- Digital Transformation brought on by the aggregation of disparate datasets to create a unified pipeline from design to simulation to sales and marketing (Industry 4.0,, Industrial Metaverse)
- High-fidelity, multi-physics/multi-disciplinary engineering simulations
- HPC+AI for
  - Accelerating design, engineering and operations simulation
  - Automating advanced manufacturing inspection & control
  - Optimizing supply chain logistics & transportation
- “AI Factory” infrastructure to support R&D
- AI opens new doors to process automation, safety and yard operations with enhanced security

Customer Challenges:

Business Leader:
- Rising capital cost of equipment. Rising equipment servicing costs.
- Lowering overheard of infrastructure & balancing expectations of the business
- Driving top line growth through innovation and new product introduction.
- Global supply chain
- Energy efficiency and sustainability
- Incorporate AI tools to improve efficiency, safety, logistics, etc

Buyer/Decision Maker:
- Managing department budget while providing best possible experience and tools to user base.
- Supporting compute performance needs of distributed, remote
- Remotely maintaining and deploying software applications.

Technical Influencer:
- Best hardware and software for efficient workflows.
- Pressure to reduce cost of manufactured systems and products.

Industry Events

CES (Jan | Las Vegas)
3DEXPERIENCE World (Feb | Houston)
Synopsys Converge (March | San Jose)
Hannover Messe (Apr | Hannover)
Automate (May | Detroit)
CadenceLIVE (May | San Jose)
Computex (May | Taipei)
NAFEMS World Congress (May | Salzburg)
DAC (June | San Francisco)
Siemens Realize Live (June | Detroit)
ISC (June | Hamburg)
Autodesk University (Sept | Nashville)
Supercomputing (Nov | St. Louis)
SEMICON (West, Japan, Korea)

Paid Media Publications

Develop3D; Engineering.com; Digital Engineering (Peerless Media); Industry Week; Designnews.com; Automation World; Manufacturing Weekly

NVIDIA

Media & Entertainment



TAM: $1T+

Segments: Intelligent Content Creation, Live Media / Sports, Ad Tech / Martech

Audiences: VP-Level Technology Decision Makers; IT Implementers; C-Level Decision makers; Researchers/ Developers; Artists/Editors/Practitioners/ Influencers

Solutions: NVIDIA AI Enterprise, NVIDIA AI for Media, NVIDIA Holoscan for Media, NVIDIA RTX PRO, NVIDIA Networking, NVIDIA Certified, Virtualization, RAPIDS, NIMs, Blueprints, Rivermax, DGX Spark, TensorRT, Riva, OpenUSD

Key Workloads: Data Science, Search and Summarization, Speech AI / NLP, Generative AI, Data Analytics, Recommenders, Personalization, Virtual Production, Video Post-Production, Video Captioning / Subtitling, Live Broadcast and Streaming, Real Time Content creation, Distribution, Enhanced Graphics, Character/dialog generation, AI-assisted Programming

Market Opportunity:

New technologies are transforming the media and entertainment industry— AI-accelerated production pipelines deliver higher quality content faster, data analytics provide deeper insights, distribution and monetization are optimized, and software-defined infrastructure is enhancing live entertainment.

Customer Challenges:

Intelligent Content Creation:

- Build sovereign AI and cloud frameworks, to create a more equitable and accessible media landscape
- Seeking deeper viewer insights for critical business decision-making, higher audience engagement and optimized streaming services

Live Media / Sports:

- Streaming platforms must process terabytes of video, audio, user interaction, analytics, and content metadata in real time—demanding high-throughput, low-latency data pipelines.

Ad Tech / MarTech

- Understand an exploding volume of video, image, and text content across the open web, apps, and streaming environments with multimodal media intelligence.
- Personalized and adaptive ad and web content, driven by real-time signals
- Evolution of agentic and programmatic workflows that can reason, plan, and execute

Game Development:

- Accelerating game development pipeline, using GPUs, AI, and hosted solutions

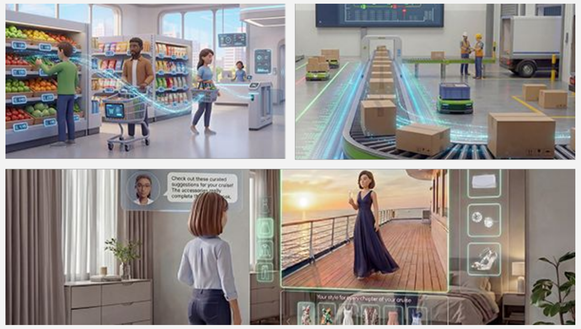
Industry Events

GDC (Mar | San Francisco)
NAB (April | Las Vegas)
Cannes Lions (June | Cannes)
SIGGRAPH (July | Los Angeles)
IBC (Sept | Amsterdam)
GTC Berlin (October| Berlin)
Adobe MAX (Oct | Los Angeles)
CES (Jan | Las Vegas)

Paid Media Opportunities

80LV, Ad Age, AdExchanger, CGW, CSI Magazine, Deadline, Digiday, Digital Media World, GraphicSpeak, Hollywood Reporter, IBC 360, IBC TV, MarTech Today, NAB Amplify, postPerspective, Post Magazine, SBJ Tech, Sports Video Group, SportsPro, SVG Europe, TechCrunch, The Atlantic, The Drum, The Verge, The Wrap, TVBEurope, Variety, Wired

Retail, CPG & QSR



TAM: $25B+ Total

Segments: Digital Commerce, Intelligent Supply Chain, Intelligent Stores

Audiences: **CxO** (CEO, CMO, CFO, CDO) **IT Execs** (CIO, CTO, VP/Head of Infrastructure) **AI Executives** (VP/Head of AI/Innovation, AI Team Director, Sr Directors and Managers), **AI Practitioners** (developers, data scientists, engineers)

NVIDIA Solutions: NVIDIA AI Enterprise, NVIDIA Retail Shopping Assistant Blueprint, NVIDIA Retail Catalog Enrichment Blueprint, NVIDIA Multi-Agent Intelligent Warehouse Blueprint, NVIDIA Retail Agentic Commerce Blueprint, NeMo, Nemotron, NIMs, CentML, Dynamo, TensorRT, Omniverse, Metropolis, RAPIDS, Riva, Isaac Sim, cuOpt

Key AI Workloads: Agentic Commerce and AI Agents, Computer Vision and Physical AI, Recommendation Systems, Digital Twins and Simulation, Data Science and Analytics

Retail Market Opportunity:

NVIDIA and our ecosystem of ISVs, system integrators, and cloud partners enable retailers, CPGs, and QSRs to harness agentic AI, accelerated inference, and physical AI to transform digital commerce, optimize supply chains, and power the intelligent store of the future.

- Agentic commerce platforms powering product discovery, shopping assistants, and retail media at scale
- Physical AI, digital twins, and optimization transforming warehouse operations and supply chain planning
- Computer vision and AI-powered associate assistants improving store operations and reducing shrinkage
- AI-driven employee productivity across ~750M workers globally (22% of workforce) with ~60% average turnover
- Accelerated computing — from agentic systems to simulation — enabling retailers to scale AI across the entire value chain

Customer Challenges:

- Lack of easy to understand and explainable AI tools, underscoring a greater need for software and solutions — specifically around turnkey AI and AI agent solutions
- Poor data quality: inaccurate, inconsistent or incomplete data makes it difficult to train models
- Limited budget means lowest upfront cost possible
- Recruiting and retaining AI experts and data scientists
- Scalable infrastructure for model training and deployment

Use Cases:

- **Digital Commerce:** Catalog enrichment, agentic commerce, shopping assistant, retail media networks
- **Intelligent Supply Chain:** Digital twins and simulation, employee productivity, warehouse analytics, route optimization, last-mile delivery, demand forecasting, warehouse operational assistant
- **Intelligent Stores:** Associate assistants, advertisement, loss prevention & asset protection, automated order taking

Industry Events

NRF Paris (Sept | Paris)
NRF NYC (Jan | New York)
ShopTalk EMEA (June | Barcelona)
Consumer Goods Forum (June | Austria)

Paid Media Publications

Retail: Wall Street Journal, Forbes, Chain Store Age, NRF, Progressive Grocer, Omni Talk, Retail Dive, Retail Touchpoints, Retail Week, Retail Wire, The Spoon, Supply Chain Dive

QSR: QSR Magazine, Fast Casual, QSR Web, Restaurant Dive

Robotics



TAM: $50 Billion
2M+ Developer, 10K+ customers, 1K+partners

Segments: Industrial (Manufacturing and Logistics), Agriculture, Smart Spaces & Retail, Construction, Transportation, Public Safety, Healthcare

Audiences: Business Leaders / Executives, Team Leaders, Software & Hardware System Architects, Researchers, Roboticists, Software Developers.

NVIDIA Solutions: NVIDIA Isaac ROS, Isaac Lab, Isaac Sim, Isaac GR00T, Cosmos, Jetson Orin, Jetson Thor, IGX Orin, IGX Thor, Metropolis (VSS Blueprint, Deepstream, TAO), Holoscan Platform, HALOS

Key AI Workloads:
AI-powered Robotics: robotic perception and manipulation, localization and mapping, robot simulation, humanoids, quadrupeds, mobile robots, robot arms, AMRs, outdoor equipment, autonomous machines
Generative AI: reinforcement learning, teleoperation, synthetic data, robotics programing,
Intelligent Video Analytics: traffic analytics, transportation, visual inspection, defect detection, retail occupancy, warehouse automation, multi-camera tracking

Market Opportunity:

Together with top partners, establish a leadership position in robotics and edge AI by creating customer demand for NVIDIA Robotics solutions that will drive revenue growth annually.

- Amplify Robotics ecosystem solutions and support their go-to-market with NVIDIA AI expertise and influence
- Level up big customer success and application-specific use cases for key strategic industries – Manufacturing, Industrial, Logistics, Agriculture, Smart Spaces and Healthcare
- Evangelize the Robotics Developer Community with the best AI capabilities and software frameworks.

Customer Challenges:

- **Industrial (Manufacturing & Logistics):** Shortage of skilled workers, increasing requirement for industrial safety, operational efficiency, warehouse logistics, supply chain management via better planning and scheduling, defect detection for higher quality production.
- **Smart Spaces & Retail:** Desire for better customer experience (wayfinding, personalization, cleanliness), reduce operational costs and redundancy, enhance security.
- **Healthcare:** Labor shortages for routine tasks or helping with patient rehabilitation / physical therapy, enhancing precision and control for surgical procedures.
- **Agriculture:** Labor Shortage and inflation, carbon neutralization initiative and sustainability, growing population, boost yields, consistency of products, slash emissions and mitigate waste, not tied to regulations to autonomous robots (vs auto)
- **Construction:** Automation of repetitive and dangerous tasks, vastly reduce material waste for sustainable construction and cost management, automate quality control and precision to speed up tasks, unsafe and inaccessible areas can be served remotely.

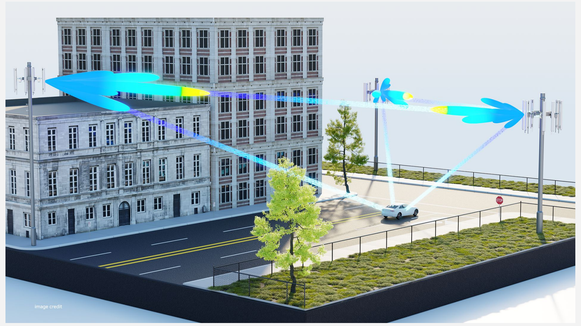
Industry Events

CES (Jan | USA)
ISC West (March| USA)
Hannover Messe (Apr | Germany)
Automatica (May | Germany)
Computex (June | Taiwan)
Automate (June | USA)
World Robotics Conference (June| China)
ROSCon (Sept I Toronto)
Smart City Expo World Congress (Nov I Spain)

Paid Media Publications

Open Systems Media: Embedded; Computing Design; Automation.com; Robotics Tomorrow; StartupHub.ai; Robotics 24/7; iTechnology Series; Founder Courier; The Robot Report; IEEE

Telecom



TAM: $200B

Segments: AI-Native 5G/6G Networks, AI Infrastructure, AI for Operations, Networking for AI

Audiences: CDO, CISO, CIO, CTO, COO, CPO, Product Teams, Business/Enterprise Teams, Data Science Teams, Operations Teams, RAN Teams, R&D Teams

NVIDIA Solutions:
AI-Native 5G/6G Networks: NVIDIA AI Aerial, AODT, GH200, GB200, RTX PRO, BlueField-3, SpectrumX, NVIDIA AI Enterprise, NeMo, NIM, NVIDIA Cloud Functions
AI Infrastructure: GB300, RTX PRO 6000, HGX, MGX, DGX, Quantum/SpectrumX, BlueField, NVIDIA AI Enterprise, NVIDIA Cloud Functions, Dynamo, Metropolis, Cosmos
AI for Operations: Nemotron, NeMo Agent Toolkit, NIM, NVIDIA AI Enterprise, AODT, DGX Cloud/Pod, AI Foundry, AI Blueprints
Networking for AI: CX7, BlueField, Spectrum, DOCA, DPF, Dynamo, Grace

Key AI Workloads: 5G/6G RAN Optimization, Spectral Efficiency, Network Utilization, Distributed AI Infrastructure (AI grids), Sovereign AI Factories, Autonomous Networks, Customer Care/Billing, IT Modernization, IT and Infra Acceleration, Programmable and Secure Network.

Market Opportunity:

Leading telcos are working with NVIDIA and our partners to enhance customer experiences and improve network operations with generative and agentic AI, transform radio access networks (RANs), offer distributed infrastructure for AI, and re-architect their networks into sovereign AI factories.

Customer Challenges:

- Stagnating revenue from traditional business areas
- Increased costs as voice/video/data traffic increases
- Increasing network complexity
- Customer experience issues

Key Themes:

- **AI-Native 5G/6G Networks:** AI-RAN and 6G research to monetize AI services, improve performance and reduce TCO.
- **AI Infrastructure:** Telcos as providers of distributed AI infrastructure for inference via AI grids. Telcos as enablers of trusted sovereign AI infrastructure/platform to government, enterprises, startups.
- **AI for Operations:** Autonomous Networks. Enhanced customer experiences. Employee productivity.
- **Networking for AI:** Maximize efficiency and utilization of infrastructure and applications.

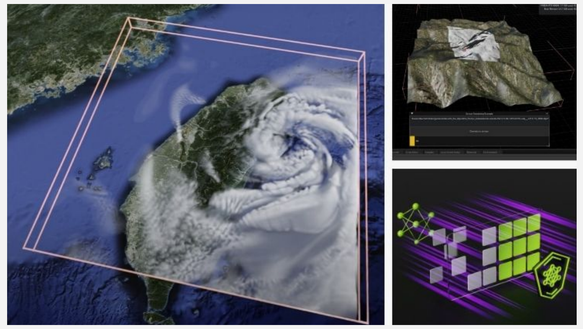
Industry Events

MWC Barcelona (Mar | Barcelona)
DTW Ignite TM Forum (June | Copenhagen)
Fyuz (Nov | Dublin)

Paid Media Publications

Light Reading, Heavy Reading, Telecom TV, RCR Wireless, Fierce Wireless, Mobile World Live

U.S. Federal



TAM: $3+ Billion

Segments: ISV/Developer, Federal System Integrators (FSIs), Cloud, DoD, Intelligence

Audiences: Developers within ISVs, System Integrators; Executives within federal agencies (CDO, CIO, IT leadership) & FFRDCs (research and development community)

NVIDIA Solutions: NV AI Enterprise, NVIDIA AI Factory, Data Center GPUs (Blackwell, DGX, A100, HGX, H100), Omniverse Enterprise, Isaac Sim

Key AI Workloads: Geospatial, Radar and Signal Processing, Agentic AI, Training and Simulation, Autonomous Machines

Market Opportunity:

60% of federal agencies are using AI, highlighting significant room for growth. With next-gen AI infrastructure, NVIDIA and our partners enable the development of secure, and scalable AI capabilities for use by the federal government. The NVIDIA AI platform empowers the government and its integrator community to unlock their data, accelerate decision-making at the edge and in the data center, and strengthen national security across all missions.

Customer Challenges:

- **Data and infrastructure**- Poor data quality, limited access to mission data, difficulty integrating siloed systems. Many environments on legacy IT systems, limited high performance compute, limited access to secure gov cloud environments, making it hard to host, secure, and scale AI workloads.
- **Cyber** - keep PII and top-secret information safe from unwanted actors and foreign adversaries. Identify threat actors in near- real time. Undocumented data and opaque models raise concerns about supply chain risk and alignment with zero trust requirements, especially for DoD programs. Gaps in encryption, monitoring and governance frameworks.
- **Experimentation and testing -** many agencies are stuck in pilot mode and lack secure sandboxes to test, iterate and then scale AI into production environments.
- **Tactical edge (DoD)**: data processing issue, hard to ping back home when deployed in remote locations. Ever growing need to make sense of higher volumes of data, all while needing to make decisions faster.
- **Automation** - Significant time and money is spent on administrative tasks, predictive maintenance, manual logging, report generation, RFI generation, etc- This is where **Agentic AI** can help save time and money.
- **HPC modernization / secure cloud access** - Data centers are running out of space and power, this is primarily a problem for the Federal SI community who manage majority of the government's workloads. Gov Clouds are running out of available space giving way for a shift back to on-prem systems or hybrid environments.

Industry Events

GTC, GTC DC
GeoINT (May | Aurora, CO)
I/ITSEC (Nov-Dec | Orlando, FL)

\+ all major cloud shows (AWS, MSFT, GCP, Oracle)

Paid Media Publications

Meritalk; GEMG: GovExec, NextGov, Federal Computer Week (FCW); FedScoop; Federal News Network; Federal Times; Axios; Washington Post