Western Digital's compelling Enterprise portfolio The Ultrastar® Family of Products

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The Universe of Data is Evolving Rapidly

Past few decades ...

From 250,000 years to compute what would take ...

<1% of the generated data deemed useful leading to unused dark data

Data siloed within individual applications

Data privacy not a primary consideration

Next few years ...

... 1 day to compute today

10% + of data generated deemed useful including past dark data (e.g., \$15B in annual value just from dark data healthcare)

Emerging technologies will enable data exchanges

Data privacy becoming increasingly relevant to society

A Data-Centric World

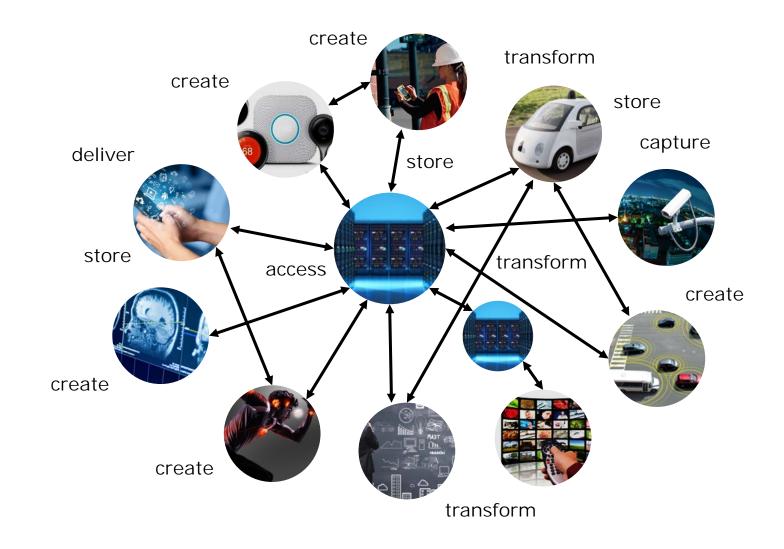
Data Interaction is Changing

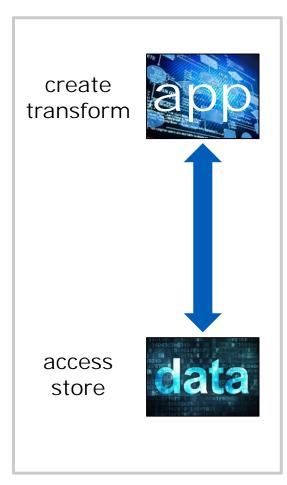
Past

Data Held Captive by Single Application

Current and Future

Data Pooled and Shared by Multiple Applications





The Evolving Role of Data Creating the data-driven economy

Data as a record





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Description		Unit Cost	Qly / Ht Rale	Arourt
Visur Jam Marsa		\$1000		1000

Data as communication







Value

Data as efficiency







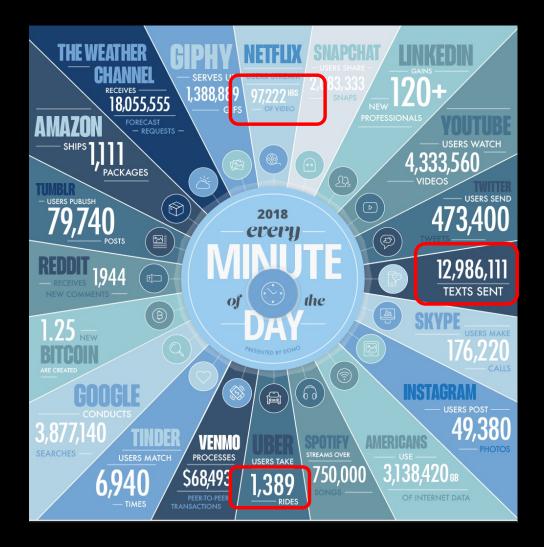
Data as currency

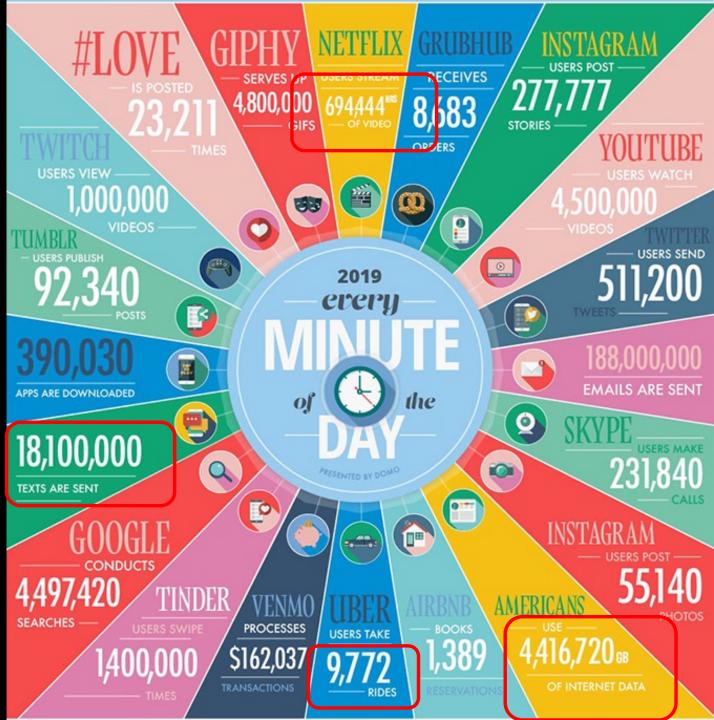




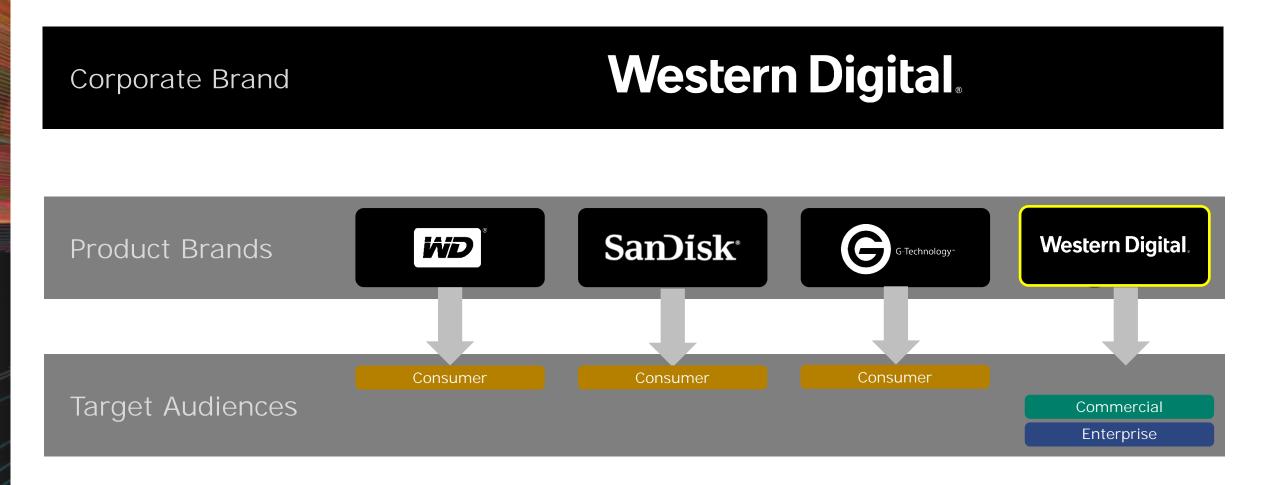
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Richness

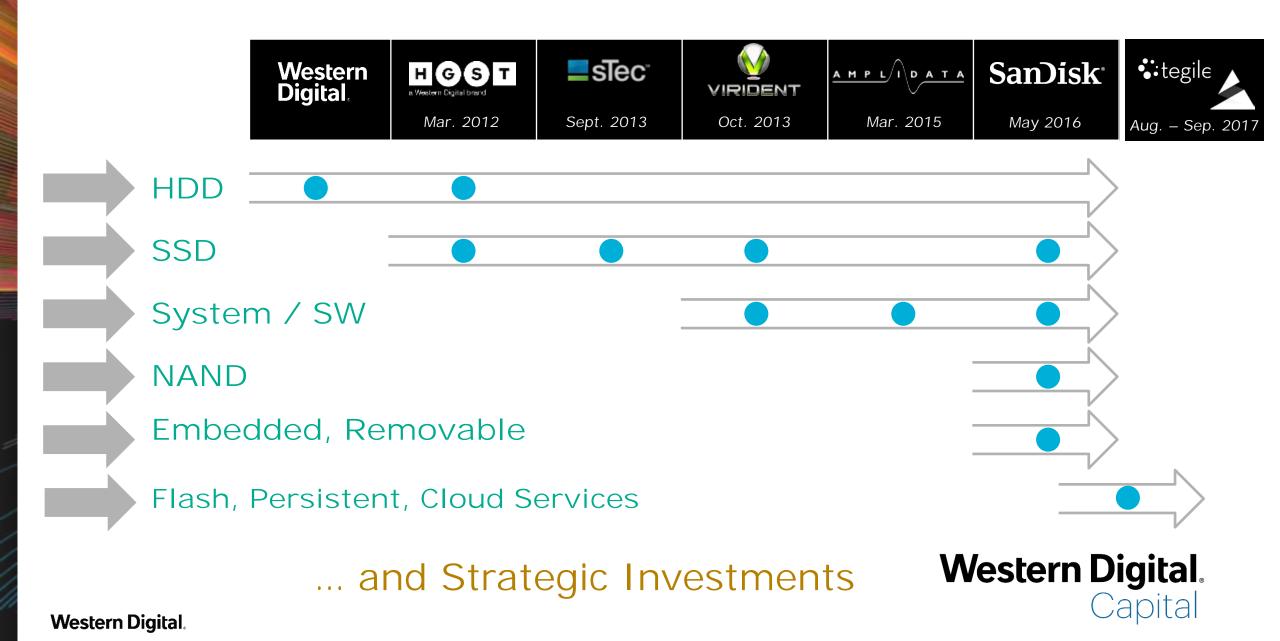




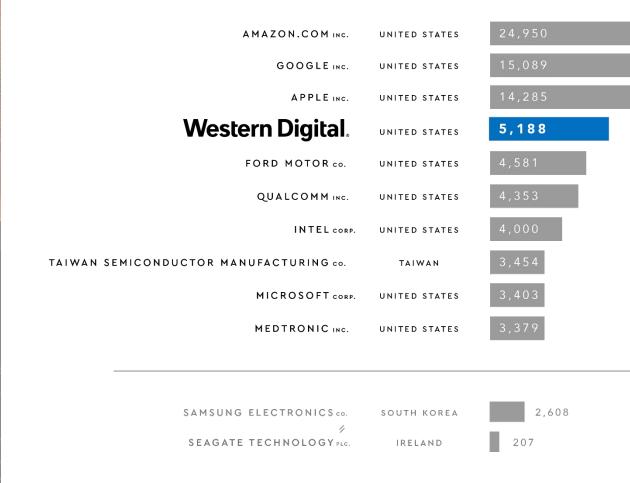
Corporate and Product Brand Structure New: Devices Group Commercial and Enterprise



Acquisitions for Storage Technology Breadth ...



The World's Most "Valuable" Patent Portfolios



14,000+ Total Issued Patents, WW

Source: IEEE includes SanDisk, WDC, and Skyera

90% of the world's data created in the past 2 years

163 ZB data generated by 2025

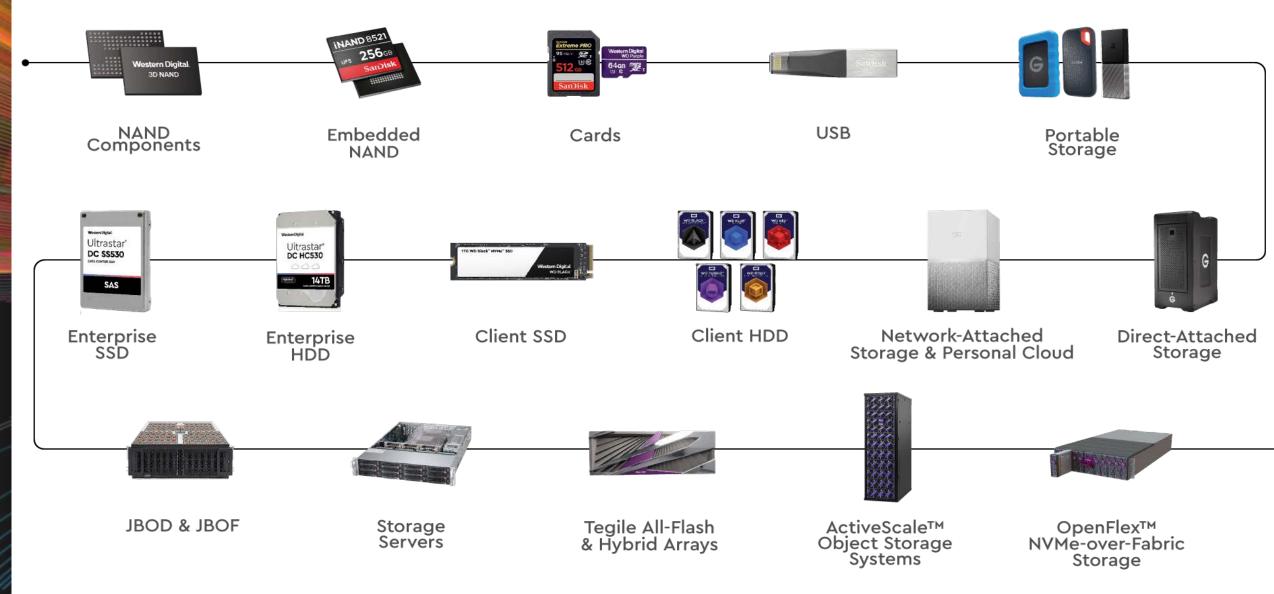


850EB of storage shipped in 2017(HDD and SSD)

65% to 80% of Data Center spend is on storage

Source: "What People Do on the Internet, Every Minute of Every Day", Domo Research, July 25, 2017. "What will we do when the worlds data hits 63 Zettabytes in 2025", Forbes, April 13, 2018 and Western Digital internal market analysis, March 2018

Broadest Portfolio of Storage Solutions



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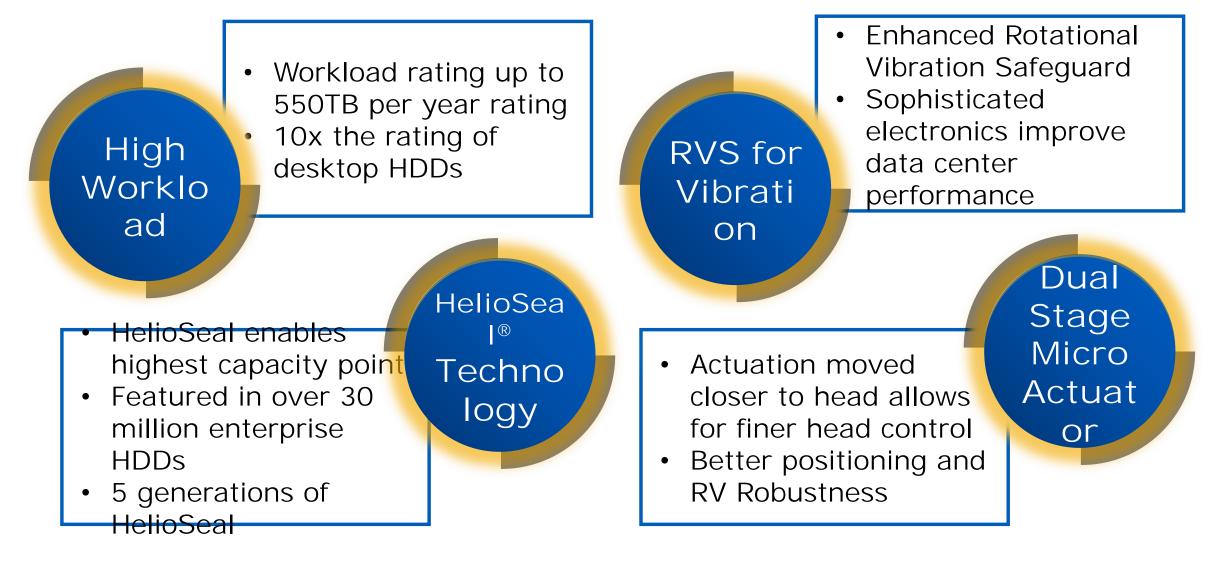
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Ultrastar HDD

100

Data Center HDD Leadership

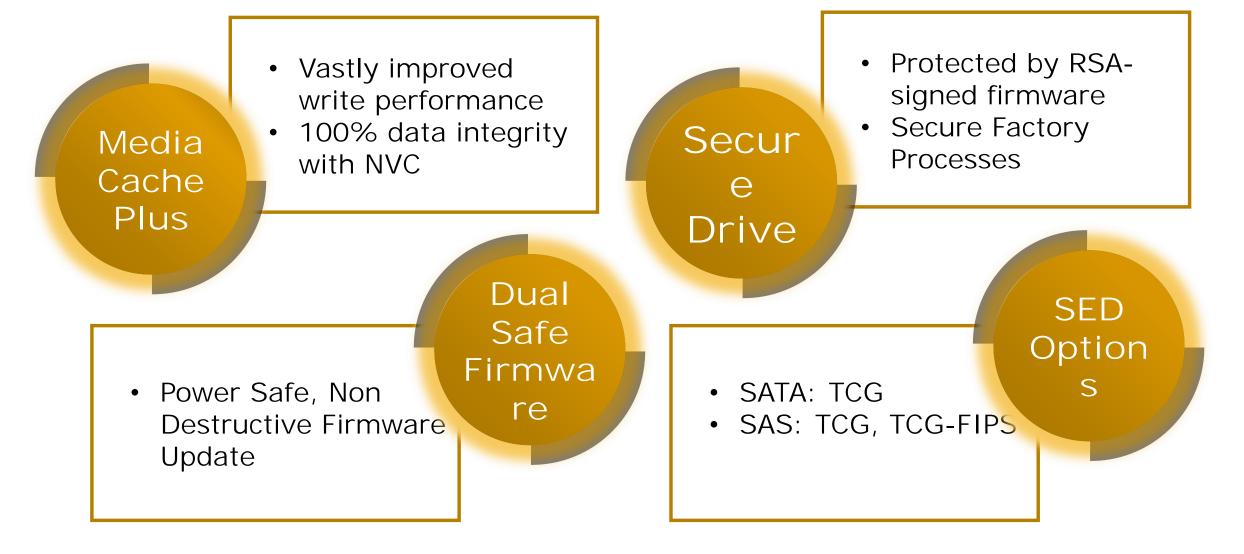
Ultrastar Series Product Benefits



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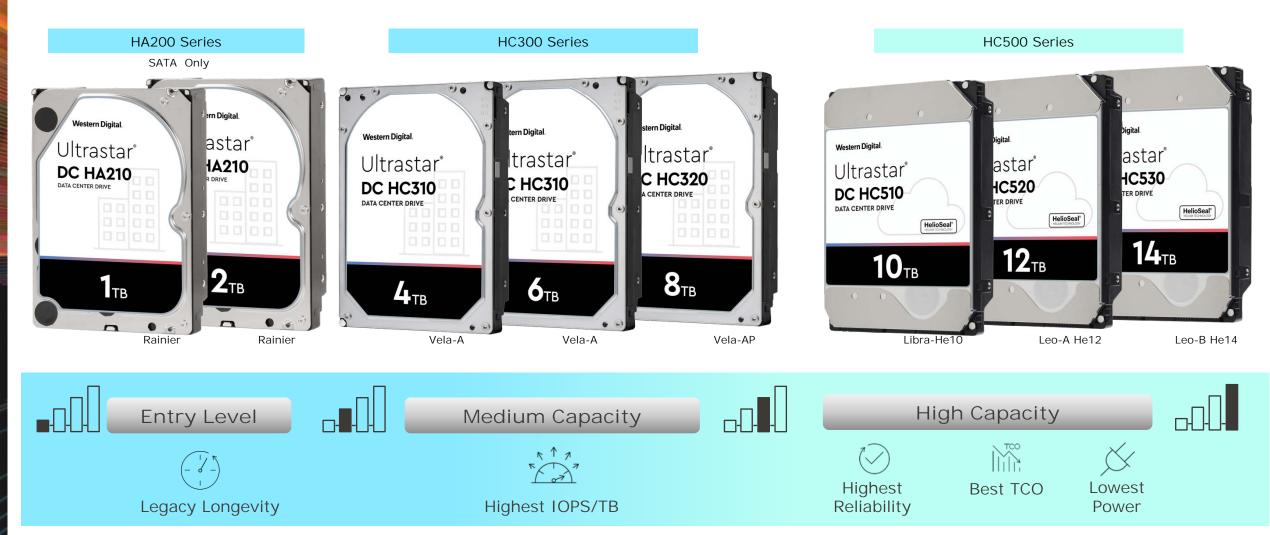
Data Technology Innovations Firmware Architecture

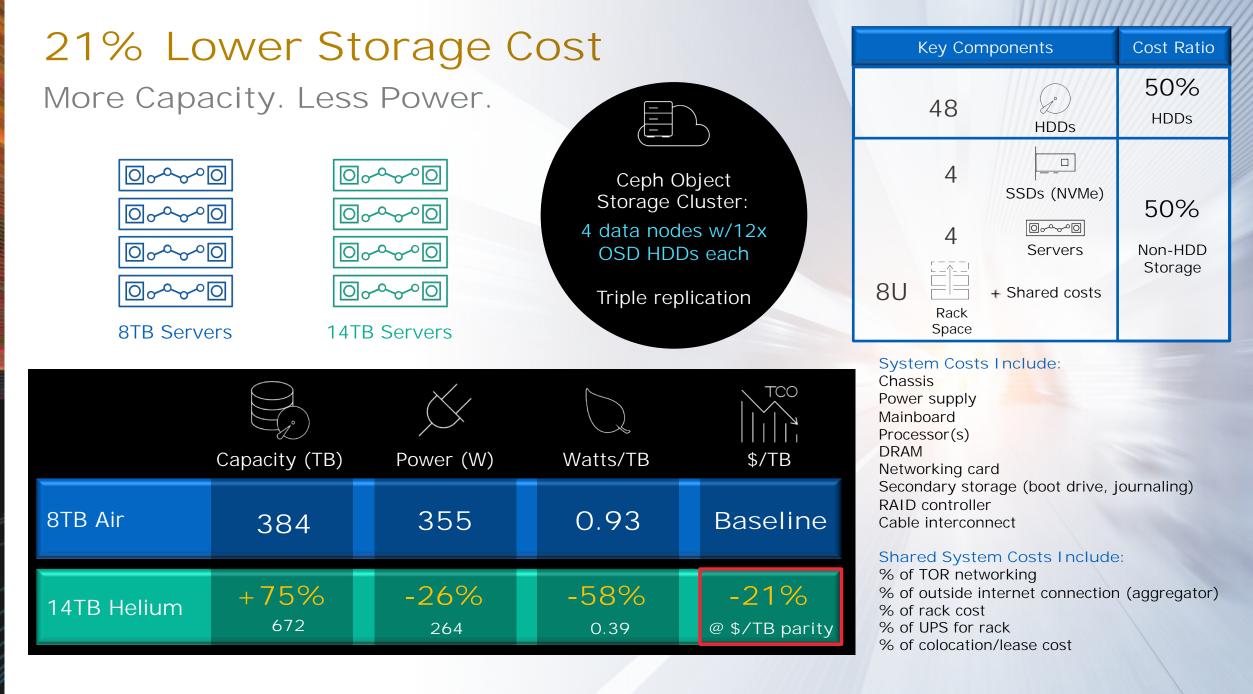


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End-to-End Storage

Data Center Drives





Data Center Leadership to Deliver 18TB CMR and 20TB SMR HDDs*



Western Digital.

Extreme Capacity 18TB CMR HDD for hyperscale, cloud, and enterprise storage 20TB Host-managed SMR HDD

Areal Density 9-disk platform with 6th generation HelioSeal technology and energy assisted recording drives capacity/density leadership

TCO

Cost-optimized configurations for ilability every important capacity point

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Ultrastar SSD

Highest performing SSDs in the market

A Tradition of Technology Leadership

World's first 128 / 96layer and 64-layer 3D NAND; first high volume production of both

technologies

Development of highest capacity, 1.33Tb die on 96-layer QLC World's Smallest 256Gb and 512Gb die based on charge trap technology

Broadest product portfolio built on 64- and 96-layer 3D NAND

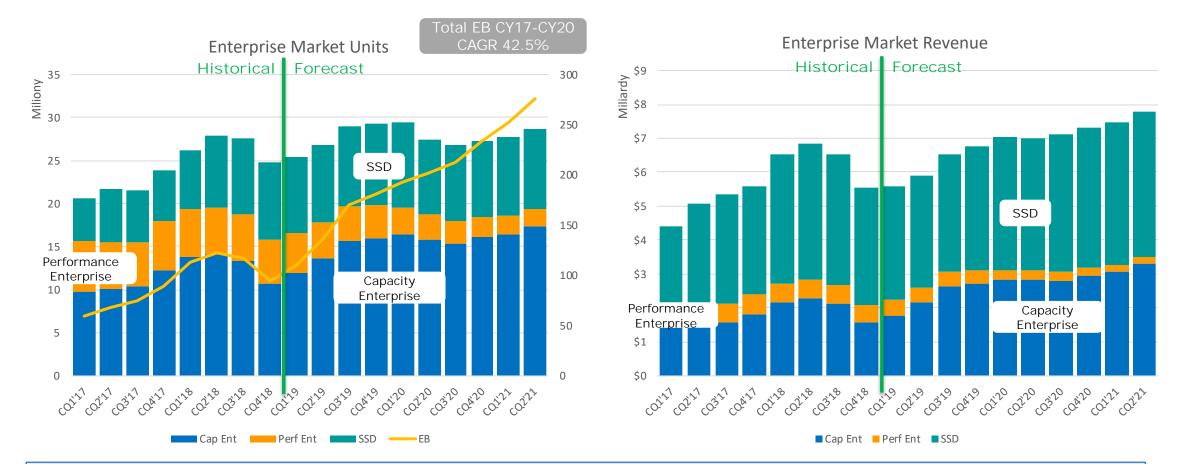


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WDC Enterprise Market View TAM by Units & Revenue



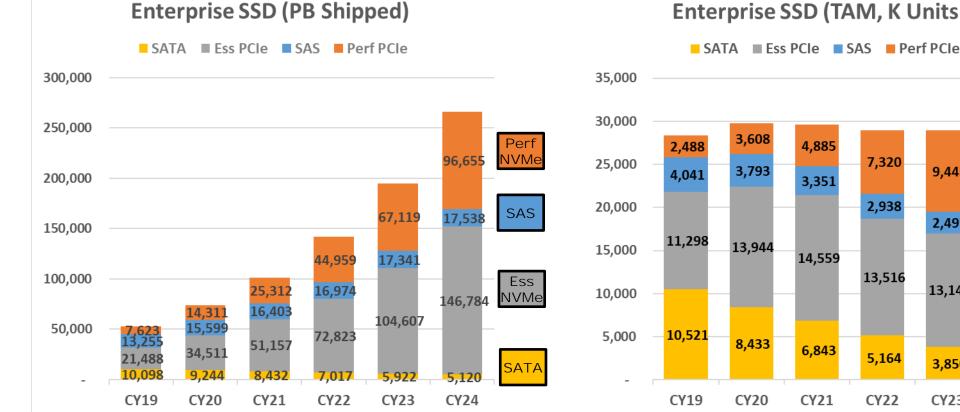
- SSD and HDD Capacity Enterprise are driving revenue expansion
- Performance Enterprise squeezed by SSD for highest IOPs
- Capacity Enterprise defined by both: lowest \$/TB for TCO, and low ASP for traditional IT applications
- HDD Exabyte CAGR driven by Hyperscale and Cloud applications

Source: WDC View, Dec 2018

Version: 4/5/2019

Enterprise NAND SSD Market Outlook (Units/PB)

Enterprise SSD Exabyte Growth without Self-Built - 38% PB CAGR 2019-2024



Enterprise SSD (TAM, K Units)

Perf

NVMe

SAS

Ess

NVMe

SATA

9,445

2,497

13,141

3,850

CY23

11,408

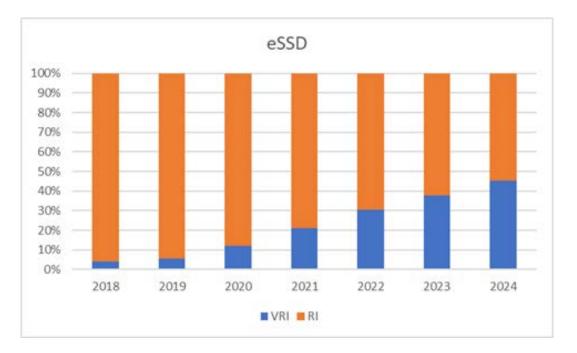
2,125

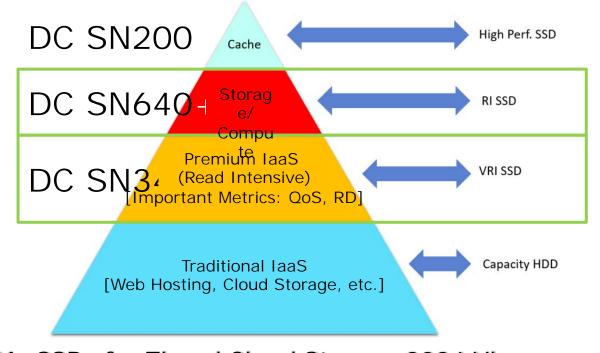
13,154

2,858

CY24

Enterprise NAND SSD Market Outlook (Units/PB) Enterprise SSD Exabyte Growth 38% PB CAGR 2019-2024*





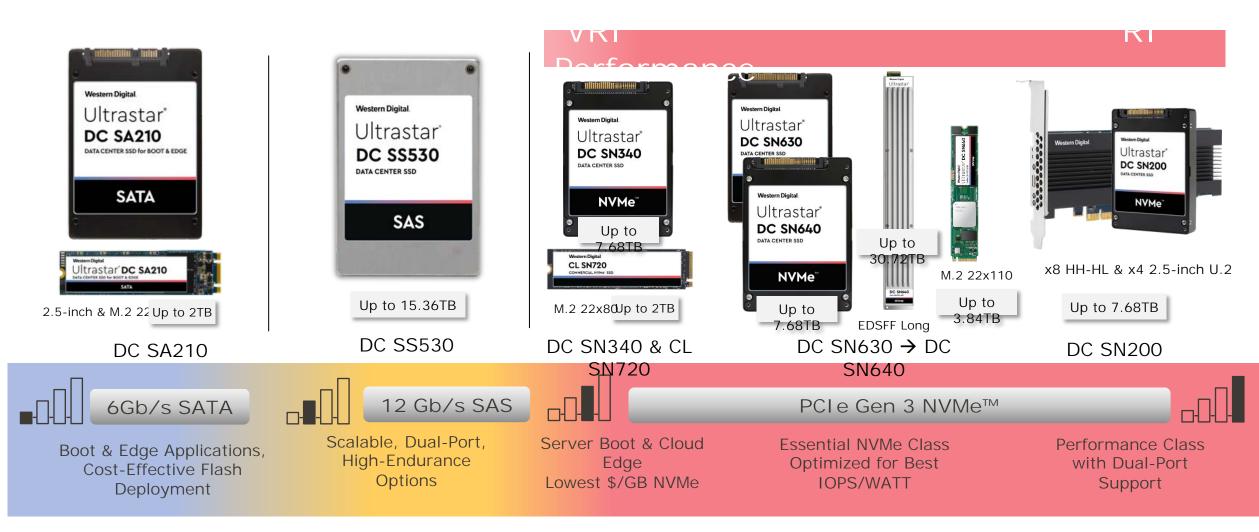
5Y VRI/RI TAM View

NVMe SSDs for Tiered Cloud Storage 2024 View

Go after major growth opportunity in VRI and RI based on dense SSD TAM

*Western Digital Internal Market And

Complete Data Center SSD Portfolio



* One gigabyte (GB) is equal to 1,000,000,000 bytes (one billion bytes) and one terabyte (TB) is equal to 1,000GB one trillion bytes) when referring to storage capacity. Accessible capacity will vary from the stated capacity due to formatting and partitioning of the drive, a computers' operating system, and other factors.

NVMe[™] SSD Segmentation

Ultrastar NVMe SSDs For Data Centers

0.3 or below DW/D	< 1 DW/D	1-3 DW/D	10+ DW/D					
 VRI Storage Very Read-Intensive Workloads 	 RI Storage Read-Intensive Workloads Scale-out Architectures 	 Caching & Compute Mixed Workloads SSD Caching Layer 	 Accelerator Write-Intensive Workloads In Memory Database 					
Content Delivery NetworksCloud Gaming Storage	 Cloud SQL & Object Storage Hyperscale and Cloud Services 	 Hyper Converged & Database Compute-Intensive Workloads: AI/ML, Analytics, E-Commerce 	 ERP, SaaS, Financial Memory Extension 					
Increasing NVMe Performance & Endurance Requirements								
 DC SN340 NVMe SSDs 3.84TB & 7.68TB in 7mm 2.5" U.2 Focused on large block writes (32K/128K/) Delivers best IOPS/WATT and Optimized for Read Q Ultrastar 	 DC SN640 NVMe SSDs 800GB to 7.68TB in 2.5" U.2 4K/8K Writes support Read/Write QoS optimized 	 DC SN200 NVMe SSDs Up to 7.68TB in Choice of HH-HL AIC or 2.5-inch SFF Optimized for 4K Random R/W Workloads -> up to 1.2M IOPS 	 DC ME200 Memory Extension 1-4TB in Choice of HH-HL AIC or 2.5-inch SFF Combines Software + Hardware Solution for Transparent Memory C 					

Western Digital.

Ultrastar™ Memory ME20

- Answer to Need for Large Memor

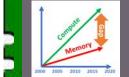
Market Trends & Challenges

User Experience



Superior application performance increasingly necessitates trend towards in-memory computing

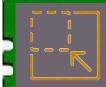
Memory Technology



\$

DIMM module size is not scaling at the same rate as compute power

Server Platforms



Number of DI MMs on newer server platforms is either flat or reduced, requiring scale-out solutions

DRAM Pricing

DRAM cost is high and tight market conditions means price is not declining as expected

Trend towards in-memory computing – but cost is high...

Introducing: Ultrastar DC ME200 Memory Drive

Western Digital's first product to optimize in-memory system capacity and performance for running demanding applications that drive today's real-time analytics and business insights.

- Drop-in for most x86 servers, software creates virtualized memory pools on Ultrastar NVMe devices
- Augments physical DRAM
 - e.g., 1:8 ratio (DRAM: DC ME200)
 - customer cases will vary ratio
- NVMe U.2 and AIC Interfaces
 - Capacity point options:
 - 1TiB, 2TiB, 4TiB
- Prefetch algorithms achieve near-DRAM performance
 - benchmarks to be published at launch:
 - Redis, Memcached, SGEMM, MySQL™
- Go-to-market:
 - global availability, direct and channel sales



Ultrastar DC ME200 Memory Extension Drive NVMe U.2 and AIC HH-HL form factors

Ultrastar™ Memory Drive – Proven Performance

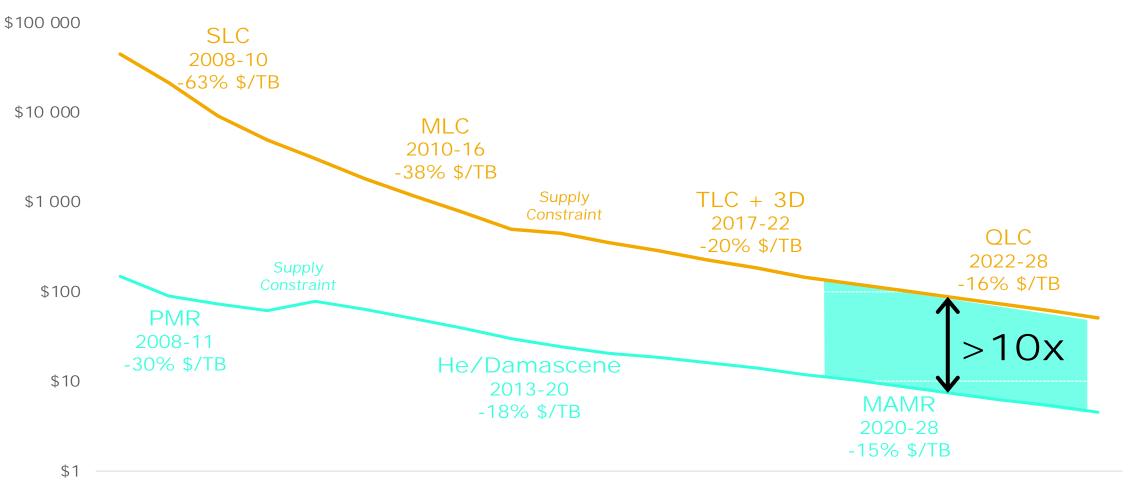
MEMCACHED	vedis	MySQL®	$A \begin{bmatrix} B \\ b_1 & b_2 & b_3 \\ c_1 & c_2 & b_3 \\ c_2 & c_2 & b_4 \\ c_3 & c_4 & c_4 \\ c_4 & c_4 & c_5 \\ c_5 & c_6 & c_6 \\ c_6 & c_6 & c_6 \\ c_$	SAP HANA
Distributed in- memory data cache for web applications	In-memory data structure store and messaging service	Relational DBMS	SGEMM Matrix Multiplication for AI/ML	SAP S/4HANA
85% - 91% DRAM performance	86-94% DRAM performance	74-80% DRAM performance	93% DRAM performance	95% DRAM performance
4x-8x memory expansion	4x memory expansion	4x-8x memory expansion	8x memory expansion	8x memory expansion

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HDD vs SSD battle

And the winner is ...

Enterprise HDD vs. Flash SSD \$/TB Annual Takedown Trend MAMR will enable continued \$/TB advantage over Flash SSDs

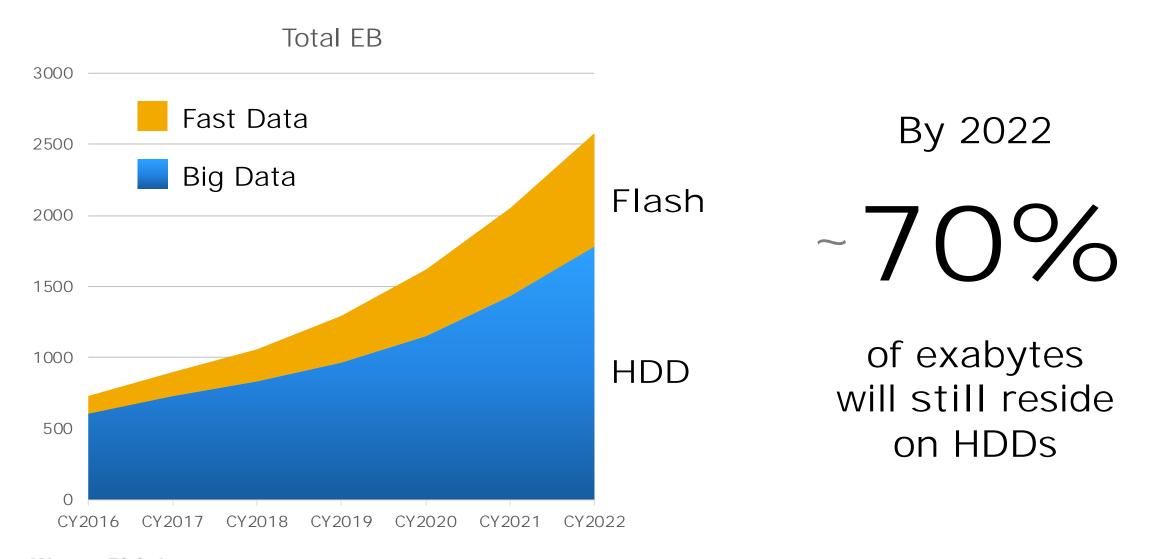


2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028

Calendar Year

Insatiable Growth in Data

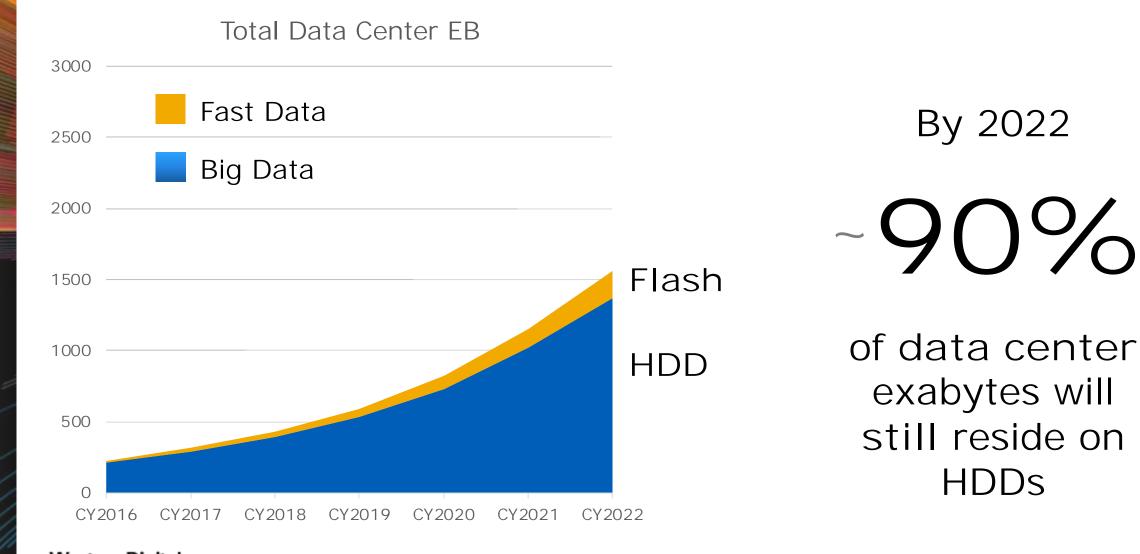
HDDs continue to play an important role in the future of data storage



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Insatiable Growth in Data

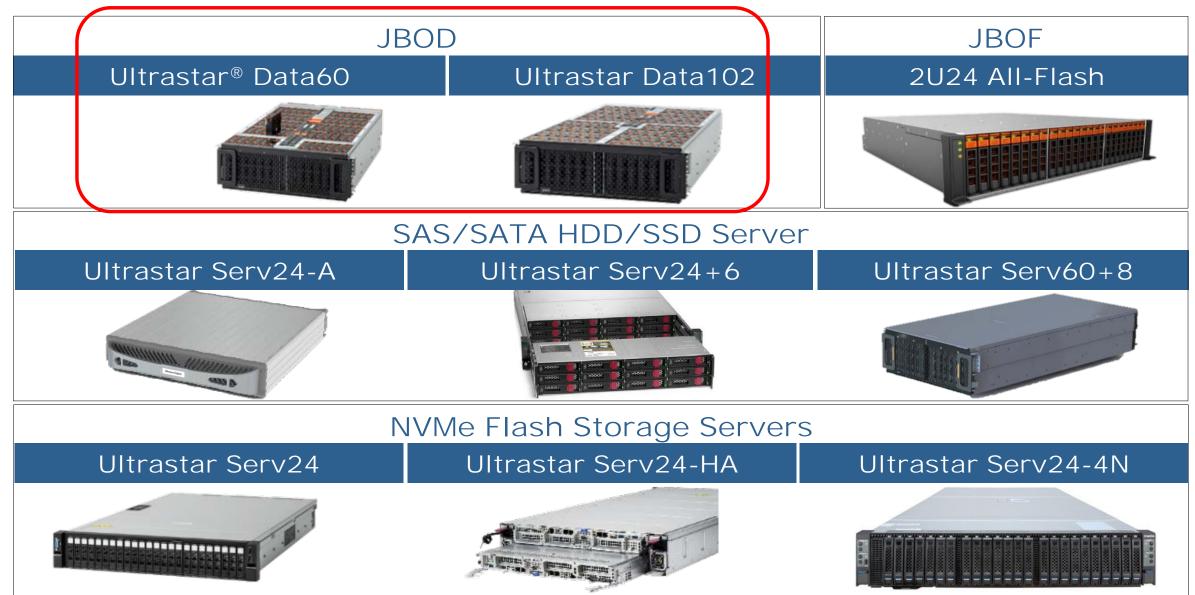
In the data center, HDDs continue to play an even bigger role



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Platforms

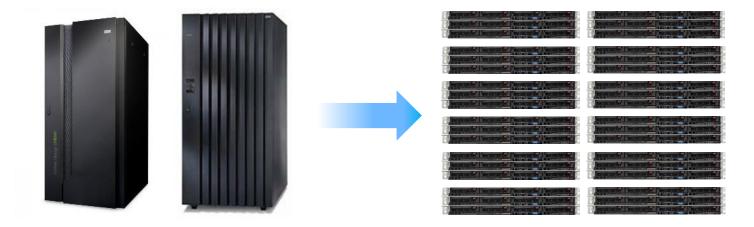
Platform Portfolio - Western Digital Ultrastar



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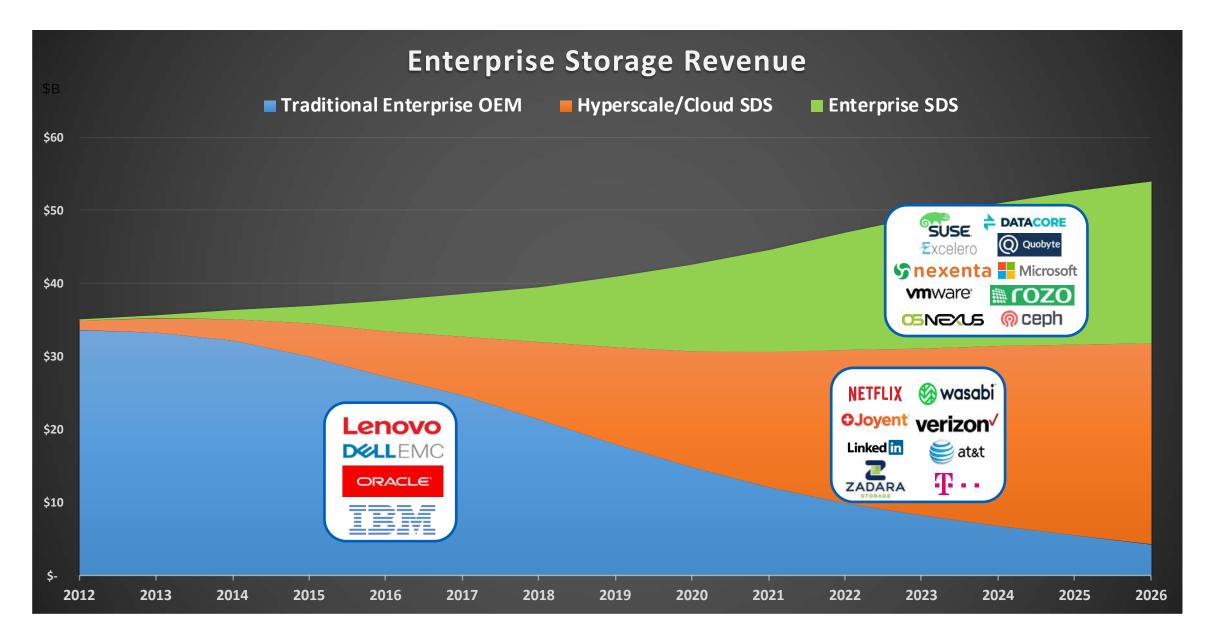
The IT World is Changing

 The way IT managers are purchasing and building their infrastructure is changing rapidly. The days of general purpose mainframes for all computing tasks are slowly dwindling, and the days of "softwaredefined everything" are rising.

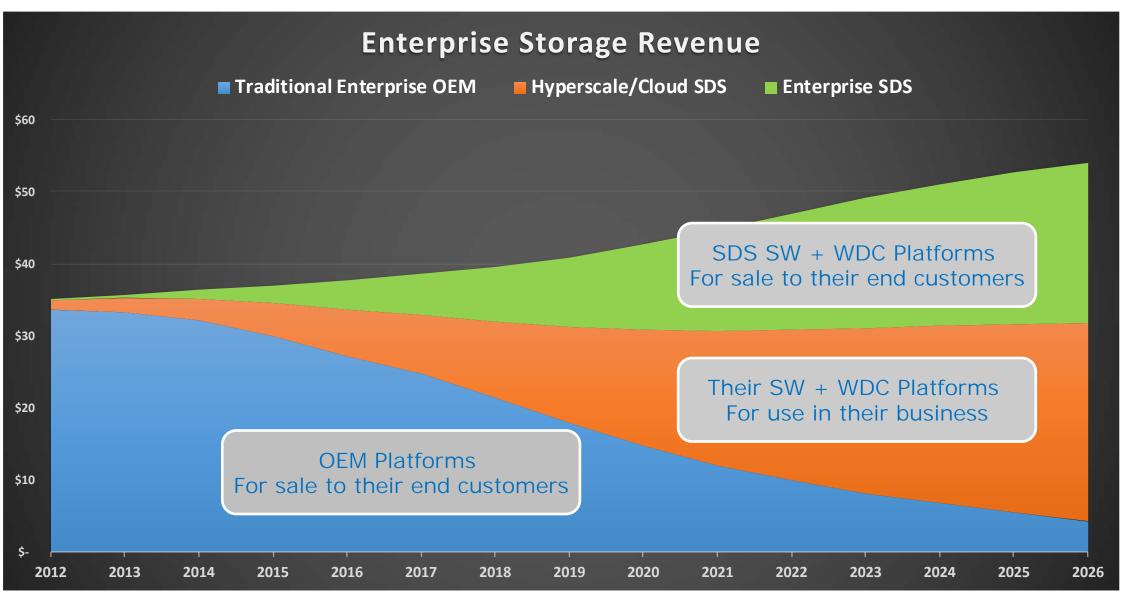


 They are buying off-the-shelf components or systems and install them together with the management software of their choice. This enables purchasing flexibility, reduces cost, and dependence on a single HW vendor.

Shifting Enterprise Storage Market

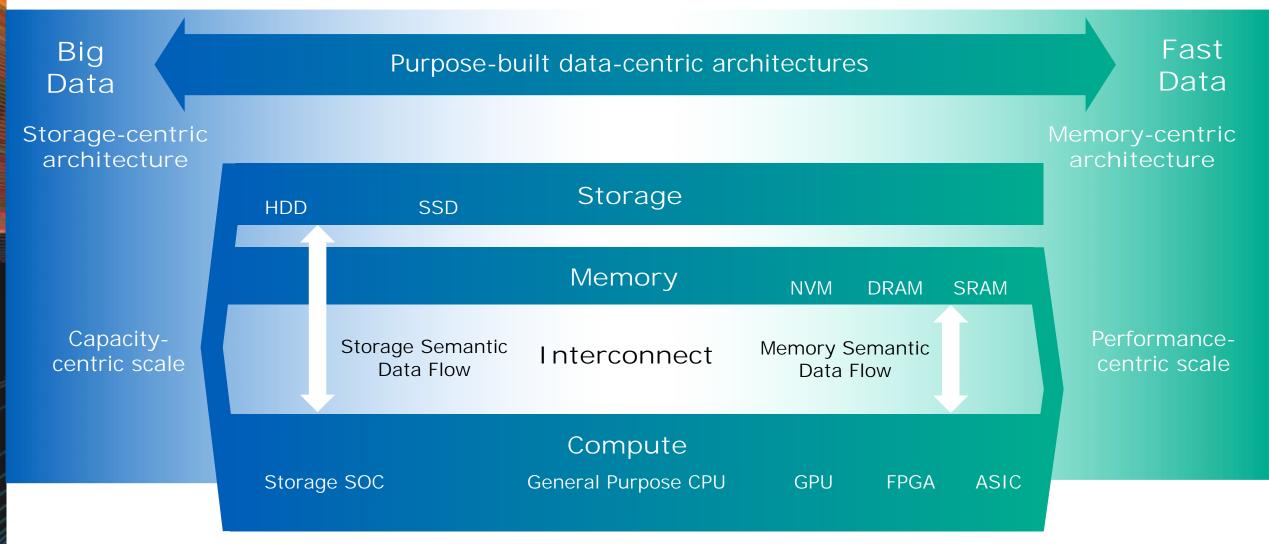


Shifting Enterprise Storage Market



Source: Wikibon, Hyperscale and Hyperconverged Server SAN Project 2017

Workload Diversity Demands Diverse Technologies and Architectures



Data Center Systems Business Unit



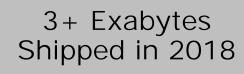
Platforms Deployed





Adding 150+ New Customers Every Quarter









400+ R&D Engineers

Western Digital. Source: WDC Investor Day January 2019

Why Platforms from Western Digital?



- Rich Experience 60+ years of designing storage
- Vertical integration
- Patents in our Platforms Built on patents in our Devices
- Fastest Time to Market



Quality, Reliability & Energy Efficiency

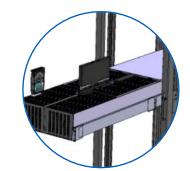
- First in the industry to offer a 5-yr warranty on HDDs
- First in the industry to offer a 5-yr warranty on storage and server platforms

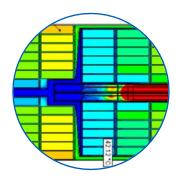
Ultrastar[®] Data Family – Patented Innovations

IsoVibe[™] Patented Vibration Isolation Technology

ArcticFlow[™] patented thermal zone cooling technology

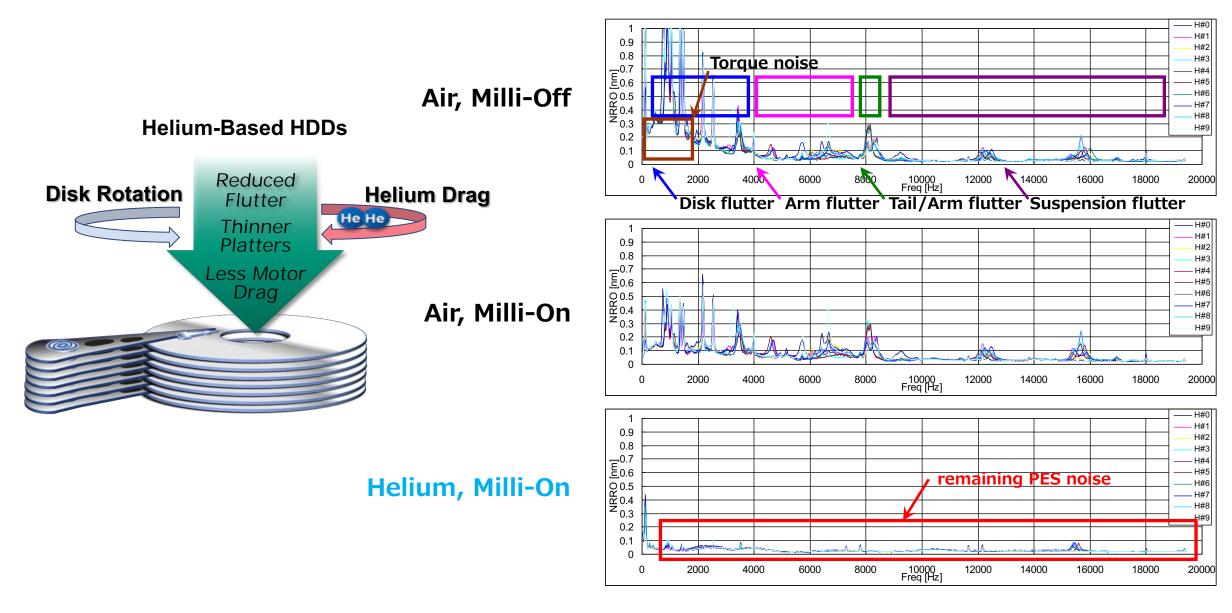
Serviceability – maximizing "cold aisle" access







We've got Helium and Helium comes with less vibration



Patented Innovation - IsoVibe™

We understand how our drives vibrate better than any other platform supplier!

- Precise cuts in the baseboard provide "suspension" for the HDDs
- Reduces the vibration transmitted from one drive to another
- Performance is maintained across the platform, even when all the drives are working hard



IsoVibe™

- Less Vibration Crosstalk
- Stable Performance

Drive Suspension Cuts

The Problem with Dense HDD Shelves Air is heated by successive rows of drives

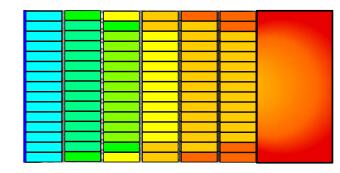


- ✓ Higher energy cost
- ✓ Higher noise levels
- ✓ Higher vibration
 - ... leading to performance degradation

✓ Higher temperatures

... likely affecting reliability and data retention

Blowers

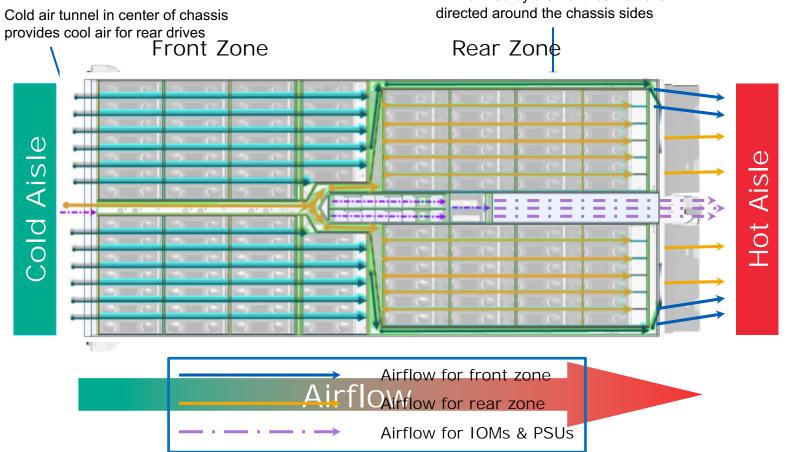


Fans

Hot Aisle

Patented Innovation - ArcticFlow[™] Dividing the enclosure into 2 thermal zones for HDDs

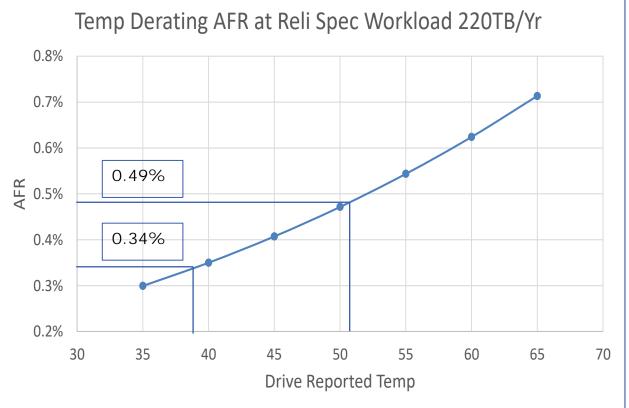
- Patented airflow management
- ✓ Warmed air from the front zone is ducted away from the rear drives
- ✓ Cool air is drawn into the center of the enclosure for the rear zone



Air warmed by the front four rows is

ArcticFlow[™] Reliability Difference Calculation

HDD AFR Follows Arrhenius Model on Temperature



Calculation:

- 70% of the drives run at comparable temperatures
- 30% of the drives in the competitive boxes run an average of 13°C hotter
- Using the temperature derating chart, AFR is increased from 0.34% to 0.49%
- 30% of the drives in the competitive box will have a 44% higher likelihood of failure

Conclusion:

 On average, systems without ArcticFlow are likely to have 13% more drive failures over time caused by operating at elevated temperatures

ArcticFlow[™] Power Savings Calculation

ArcticFlow Energy Savings

Life savings per enclosure	\$	1,563.30 Over 5-year lifecy	vcle
Typical lifecycle		5 Years	
Total data center savings	\$	312.66 Per year	
PUE		1.8	Ranges from 2.2 (typical) to 1.2 (most efficient)
Cost saving/enclosure	\$	173.70 per year	
Cost /kWh	\$	0.12 <mark>\$/kWh</mark>	Varies by state and by country
Power savings per year		1448 kWh per year	
Power saving per enclosure		165.24 W per enclosure	
Number of drives		102 HDDs	
Per slot power savings		1.62 W per HDD Slot	
Ultrastar Data102 power		1.64 W per HDD Slot	
Competitors average power		3.26 W per HDD Slot	

Rack Mounting & Serviceability

Cold Aisle Service

- Industry-leading, cable-free
- Hot-swap IOM & Fans
 - Blowers can be changed individually
- Easy-swap, high-availability HDDs & SSDs
 - Disk Drives can be changed in operation

Hot Aisle Service

Rear View Hot Isle

•PSUs

- •CMA pivots away for easy access
- •Cables fixed to rack and held by CMA
- •Vibration Isolated Fans

Rack Mounting & Serviceability

Lid remains in rack

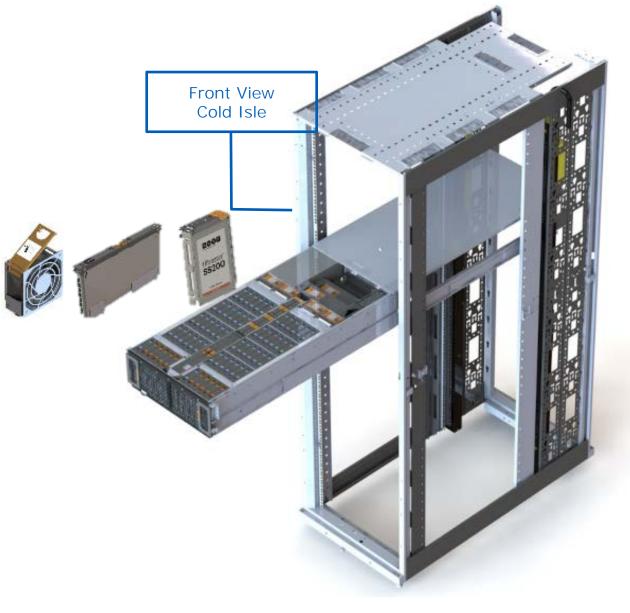
• Ease of use, prevents loss/damage

Easy operation

• No tools required at all

Data60/102 FRUs





Ultrastar Data60 Designed for Extreme Density



IsoVibe[™] ArcticFlow[™]

60-Bay Hybrid Storage Platform with up to 24 SSDs

HDD up to 14 TB SAS or SATA SSD up to 15.36 TB Available Capacities

2x 6x 4x-12Gb/s SAS3 Host Ports

57.6 GB/s Bandwidth

96TB - 840TB Capacity

Ultrastar Data102 Designed for Extreme Density



IsoVibe[™] ArcticFlow[™]

102 – Bay Hybrid Storage Platform with up to 24 SSDs

Dual-Port SAS or Single-Port SATA HDDs Options

2x 6x 4x-12Gb/s SAS3 Host Ports

57.6 GB/s Bandwidth

360TB – 1.428PB

Capacity

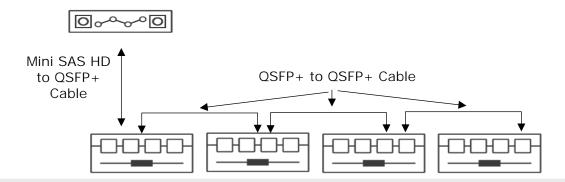
High Availability Hybrid Platform

- 60/102 dual ported HDDs and SSDs (max. 24#) individually hot swappable
- 12Gb/s SAS-3 or 6Gb/s SATA-3 drives supported
 512n/4Kn/512e, SE/ISE/TCG
- 6# 4-lane powered and managed mini-SAS HD ports per IO Module (2 IOM)
- Hot swap of all FRUs including individual drives
- Dual redundant 80+ Platinum rated 1600W CRPS PSUs



Storage Enclosure special features

- In-band and Out Of Band enclosure management
 - Out Of Band management via Redfish
 - In-band via SES-3
- -Firmware upgrade
- -T10 Zoning
 - with up to 6 servers
 - Drive power off using T10 Power Disable (Pin 3)
- -Daisy Chain Expansion



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Ultrastar Data60 & Data102



Data102 System Length 1037 mm (1160 w/CMA) System Weight w/o railkit - ~ 32 kg w/o drives - ~ 109 kg w/ drives

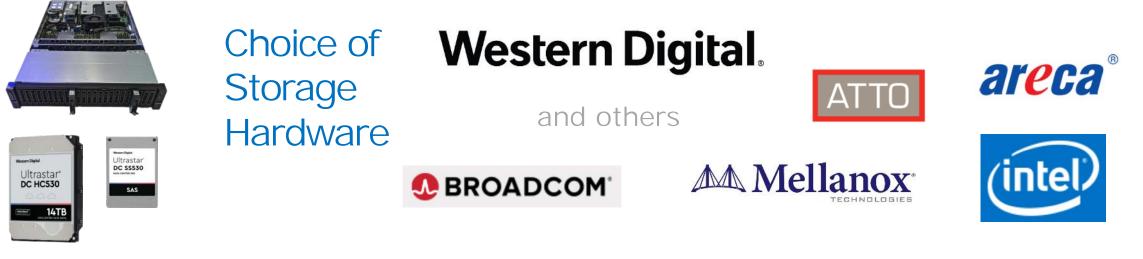


Data60 System Length 705 mm (850 mm w/CMA) System Weight w/o railkit - ~ 27 kg w/o drives - ~ 79 kg w/ drives



Software Defined Solutions Customer Freedom to define and build their Solution



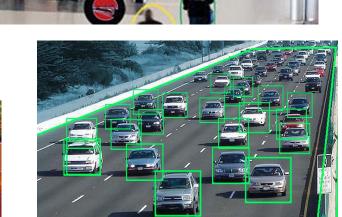


Surveillance Recording with real time analysis

- Application demands the most robust storage available
- High workload

- Heavy reads & writes
- Random reads, sequential writes
- Very high storage demand
 - High capacity and high performance
 - Metadata & reference images ideal for flash tier
 - Multiple HDDs induce high vibration
- Durability & long term availability
 - Data center server environment
 - Expect highly reliable operation
 - High availability and redundancy

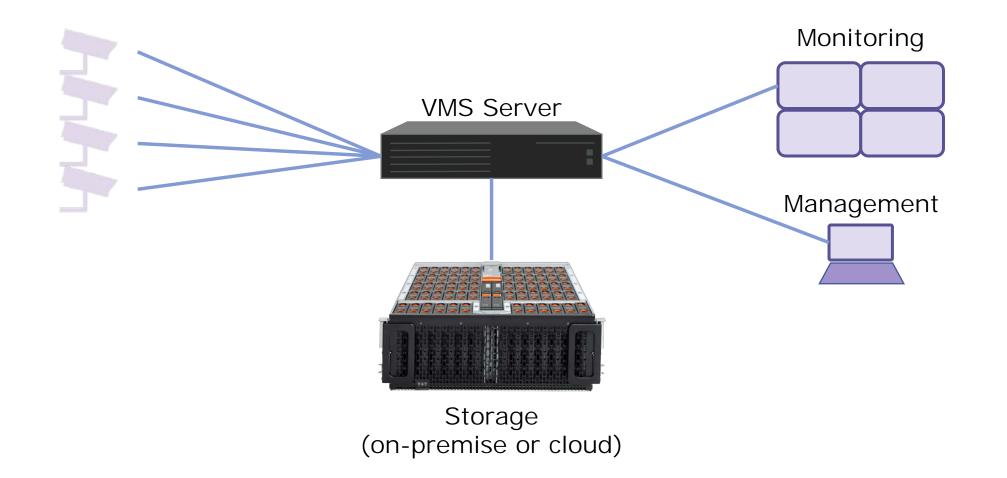


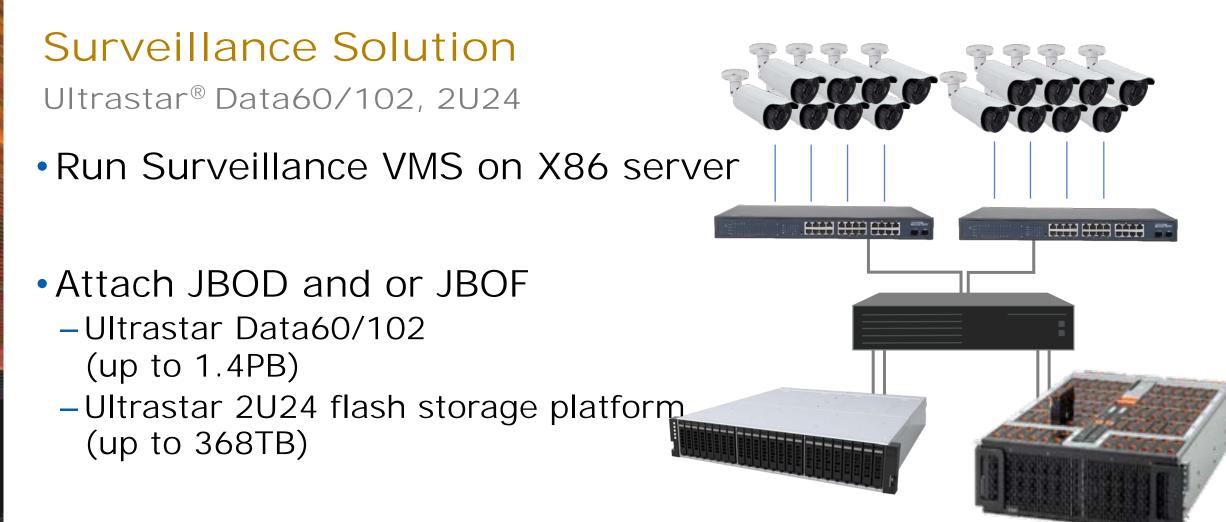






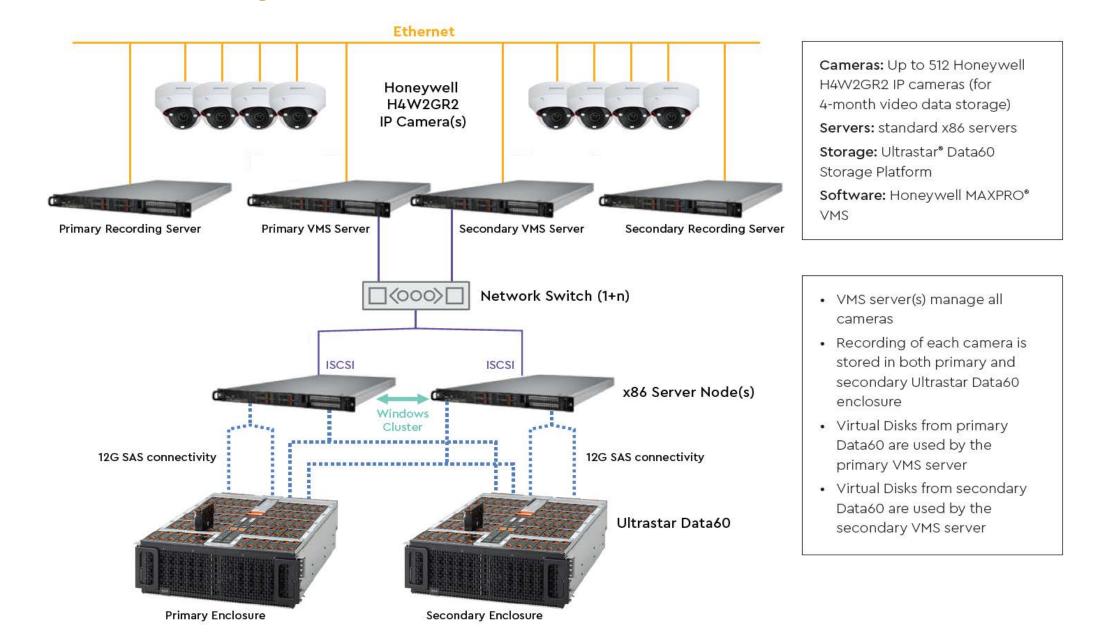
Typical Video Management System (VMS)





SSD, hybrid or HDD storage
 Balance capacity / performance / cost

High-Availability VMS Reference Architecture



Winning with Ultrastar® Storage Platforms



Multi-PB eCommerce Website

- 100M+ online transactions per day
- Doubled annual ecommerce sales with no service interruption

KEY VALUE

High performance, reliability, and resiliency



Multi-Cloud Gaming

- Tournament-quality gaming experience for 1000s of users
- Freedom to play any content on almost any device

KEY VALUE

Low-latency platform delivering high frame rates



Massive Scale Data Backup

 High Performance data protection with enterprise backup and recovery software

KEY VALUE

Simple, efficient, and consolidated compute and storage



Flexible, High-Performance Platform for Custom Applications

Application Matrix

	Data60 Data102	2U24-AF	Serv60+8	Serv60+8 Serv24+6	Serv24	Serv24-HA Serv24-4N
Backup / Archive	+ + +		+ + +	+		
Surveillance	+ + +	+ +	+ + +	+ +	+	
Video on Demand		+ +			+ + +	
File Storage (NAS)	+	+ +	+ + +	+ +	+	
Block Storage (SAN)	+ +	+ +	+ +	+ + +	+ +	+
Parallel File Systems	+	+ +	+	+ +	+++	+ +
Object Storage	+			+ +	+ + +	+ +
Flash over Fabric					+ +	+ + +

Warranty and Support

	Data60 / Data102	2U24 All-Flash Platform	Serv24, Serv24-HA
Warranty SSD HDD Enclosure	Earlier of 5 years or ≤1% endurance remaining 5 years 5 years	Earlier of 5 years or ≤1% endurance remaining 5 years	Earlier of 5 years or ≤1% endurance remaining 5 years
Support FRU/CRU RMA Replacement on Receipt Mo-Fr Business Hours	Yes Yes	Yes Yes	Yes Yes
Fee-based Services Advance Replacement Option No Return Option StorChoice Silver StorChoice Gold StorChoice GoldPlus	Yes Yes 1yr, 3yr, 5yr 1yr, 3yr, 5yr 1yr, 3yr, 5yr	Yes Yes 1yr, 3yr, 5yr 1yr, 3yr, 5yr 1yr, 3yr, 5yr	Yes Yes 1yr, 3yr, 5yr 1yr, 3yr, 5yr 1yr, 3yr, 5yr

StorChoice SLA Definitions

Support Services¹

Features	Basic Silver	Enterprise Gold	Enterprise Gold Plus ⁵	
Support Operations	24 × 7	24 × 7	24 × 7	
Response Targets (severity 1)	1 hour	30 minutes	30 minutes	
Hardware Service Terms ³	1, 3 & 5 yrs	1, 3 & 5 yrs	1, 3 & 5 yrs	
RMA/FRU Replacement	Next Business Day	4 hour⁴	4 hour ⁴	
Access	Phone/email	Phone/email	Phone/email	
Response	Phone/email	Phone/email	Phone/email	
On-site Field Technician	No	No	Yes	
Access to SW & Firmware Updates ⁶	Yes	Yes	Yes	
No-Return Option ⁷⁸	Available for purchase	Available for purchase	Available for purchase	

¹ All product units purchased by a customer must be under the same purchased support level, and all upgrades and/or expanded capacity for a product unit must be under the same purchased support level. May require a lead time of up to 90 days to set up service. May not be available in all locations. Contact your sales representative for availability of Next Business Day and Same Day parts replacement delivery services. Support Services must be purchased at the same time as the corresponding hardware purchase.

² Please see product warranty terms and conditions for details.

³ Support service commences on the date of shipment for hardware, and on the date of transmission for software.

* RMA/FRU replacement service level time starts upon manufacturer determination that a FRU replacement is required. No-return options are available for Silver and Gold customers as an additional option to be charged separately.

⁵ Gold Plus must be separately purchased in order to receive On-site Field Technician.

⁶ Provides bug fixes, patches and software updates (minor versions) as available.

⁷ Option only covers drives or flash and not other components of the system/platform. Available for purchase with Silver and Gold options.

⁸ No-return option availability is subject to certain conditions and eligibility requirements.

Reference Architectures:

- High Performance, High Capacity Scalable Storage Solutions with Western Digital storage and DataCore SANsymphony software
- All-Flash Storage Solution with Ultrastar Serv24 NVMe and DataCore SANsymphony
- <u>Tiered Storage Solution with Ultrastar Serv24 NVMe server</u>, <u>Data60 storage and DataCore SANsymphony</u> <u>software</u>
- <u>Tiered All-Flash Storage Solution with Ultrastar Serv24 NVMe server, 2U24 Flash Storage Platform and</u> <u>DataCore SANsymphony software</u>
- Performance Tiered Storage Solution with Serv24 NVMe server, 2U24 storage, Data60 storage and DataCore SANsymphony software
- Honeywell with Ultrastar Data60 High Capacity, Fail-over Surveillance Solution
- High Capacity, Fail-over Surveillance Solution using MileStone VMS and Ultrastar Data60

Cases Studies, Solution Briefs and Whitepapers:

- High-Performance Storage for Media & Entertainment Based on Western Digital Ultrastar Data60 and Rozo Systems Software
- Faster, More Reliable and Lower Cost Backups with Ultrastar Data60 and Veeam Backup & Replication Software
- Modernize your Storage with Ultrastar Data60 and Rozo Systems Software
- WDC, Quobyte and NEC Work Together to Deliver Powerful, Flexible Research Platform
- <u>White Paper Ultrastar Serv24, Fast and Flexible Storage for Windows Storage Spaces</u>

