Growth Opportunity in Manufacturing

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Safe Harbor

Each of the presentations today will contain forward-looking statements about our strategies, products, future results, performance or achievements, financial, operational and otherwise, including statements about our strategic priorities, business model transition, and guidance for the first fiscal quarter and fiscal year 2020; our long term financial and operational goals; our M&A strategy; our capital allocation initiatives; and our stock repurchase program. These statements reflect management’s current expectations, estimates and assumptions based on the information currently available to us. These forward-looking statements are not guarantees of future performance and involve significant risks, uncertainties and other factors that may cause our actual results, performance or achievements to be materially different from results, performance or achievements expressed or implied by the forward-looking statements contained in these presentations, such as a failure to maintain ARR, ARPS, subscriptions, billings, revenue, deferred revenue, margins and cash flow growth; difficulty in predicting those financial and performance metrics; failure to maintain spend management; failure to successfully integrate acquisitions and manage transitions to new business models and markets, including our efforts to expand in construction and manufacturing, and attract customers to our cloud-based offerings; failure to successfully expand adoption of our products; and negative developments in worldwide economic or political conditions.

A discussion of factors that may affect future results is contained in our most recent Form 10-K and Form 10-Q filings available at www.sec.gov, including descriptions of the risk factors that may impact us and the forward-looking statements made in these presentations. The forward-looking statements made in these presentations are being made as of the time and date of their live presentation. If these presentations are reviewed after the time and date of their live presentation, even if subsequently made available by us, on our website or otherwise, these presentations may not contain current or accurate information. We disclaim any obligation to update or revise any forward-looking statement based on new information, future events or otherwise.

Non-GAAP Financial Measures
These presentations include certain non-GAAP financial measures. Please see the section entitled “Reconciliation of GAAP Financial Measures to non-GAAP Financial Measures” in the Appendices attached to the presentations for an explanation of management’s use of these measures and a reconciliation of the most directly comparable GAAP financial measures.
Manufacturing TAM

$31B

DESIGN & MAKE TAM BY 2023

28M

DESIGN, ANALYST & PRODUCTION ENGINEERING PROFESSIONALS BY 2023

Source: Cambashi FY20 Application TAM. The TAM numbers presented are estimates & are likely understated given the impact of availability of free software, in-house development & other variables.
Manufacturing TAM

$18B
DESIGN TAM BY 2023

+$

$13B
MAKE TAM BY 2023

Source: Cambashi FY20 Application TAM. The TAM numbers presented are estimates & are likely understated given the impact of piracy rates, availability of free software, in-house development & other variables.
Electrification & Smart Products

Demand for Mass Customization

Supply Chain Volatility
27.1B NETWORKED DEVICES BY 2021

50% DEVICES DRIVE MACHINE TO MACHINE CONNECTION

Sources:
Mass Customization
CONSUMERS BY 2025
+1.8B SINCE 2010

INCREASE IN PERSONALIZATION INVESTMENT IN NEXT 3 YEARS

Sources:
 BCG.com June 4, 2019

Next level of personalization in retail
Supply Chain Volatility
DIGITAL PLATFORMS’ IMPACT ON TRADE VIA REDUCTION IN TRANSACTION COSTS BY 2030

$1.3T +

ADVANCED ROBOTICS DRIVES REDUCTION IN GOODS TRADE THROUGH RESHORING/ONSHORING BY 2030

$1.5T +

Unprecedented Value

$495/year Sub + $1500/year Extension
Outcome based pricing for Generative Design

$5,000-$50,000
A partnership combining ANSYS’ technology and engineering strength with Autodesk’s design and manufacturing technology.
“This (*Generative Design*) disruptive technology provides tremendous advancements in how we can design and develop components for our future vehicles to make them lighter and more efficient”

Ken Kelzer  
VP, Global Vehicle Components and Subsystems  
GENERAL MOTORS

“*We can share projects real easy in real time with customers and partners*”

Christian Welch  
CEO, Swisomation

“In my organization, Fusion 360 is used to design our 3D prototypes for make 3D printings and test the products before the final version. We collaborate a lot with the design department because all the electronics have to fit in the prototype perfectly. We make the stuff at the same time all together”

Alejandro Daniel C,  
Electrical Engineer