



# Forward Looking Statement

This presentation contains projections and other “forward-looking” statements regarding our products, business and operations, including but not limited to our views relating to hyperscale and AI environments, our ability to meet hyperscalers’ performance and price requirements, our ability to expand with our current hyperscale customer and to land new hyperscale customers, our ability to meet the needs of hyperscalers for the entire spectrum of their online storage use cases, the timing and magnitude of large orders, including sales to hyperscalers, the timing and amount of revenue from hyperscaler licensing and support services, future period financial and business results, demand for our products and subscription services, including Evergreen//One, the relative mix between our subscription and consumption offerings and traditional capital expenditure sales, our technology and product strategy, specifically ongoing development and customer adoption of new products and the Enterprise Data Cloud architecture (including Pure Fusion), priorities around sustainability and energy saving benefits to our customers of using our products, our ability to perform during current macro conditions and expand market share, our sustainability goals and benefits, the impact of inflation, currency fluctuations, tariffs, economic or supply chain disruptions, our expectations regarding our product and technology differentiation, new technology investments and partnerships, and other statements regarding our products, business, operations and results.

Forward-looking statements include all statements that are not historical facts and can be identified by terms such as “anticipate,” “believe,” “could,” “seek,” “estimate,” “intend,” “may,” “plan,” “potential,” “predict,” “project,” “should,” “will,” “would” or similar expressions and the negatives of those terms.

Forward-looking statements involve known and unknown risks, uncertainties and are based on potentially inaccurate assumptions that could cause actual results to differ materially from those expected or implied by the forward-looking statements. Additional risks, uncertainties and other factors are included under the captions “Risk Factors” and “Management’s Discussion and Analysis of Financial Condition and Results of Operations,” in our reports previously filed with the SEC, which are available on our website at [investor.purestorage.com](http://investor.purestorage.com) and on the SEC’s website at [www.sec.gov](http://www.sec.gov).

Forward-looking statements represent our beliefs and assumptions only as of the date of this presentation. Except as required by law, we assume no obligation to update these forward-looking statements publicly, or to update the reasons actual results could differ materially from those anticipated in the forward-looking statements, even if new information becomes available in the future.

# Paul Ziots

Vice President, Investor Relations

# Agenda

## Pure's Platform Strategy and the Enterprise Data Cloud

Charles Giancarlo, Chairman & Chief Executive Officer

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## Pure's Fundamental Advantages

Rob Lee, Chief Technology Officer

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## Customer Journey to Pure's Cloud Operating Model

Prakash Darji, General Manager, Digital Experience

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## Pure's Hyperscaler Business

Bill Cerreta, General Manager, Hyperscale

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## Q&A Session

Charles Giancarlo, Chairman & Chief Executive Officer

John "Coz" Colgrove, Founder & Chief Visionary Officer

Rob Lee, Chief Technology Officer

Tarek Robbiati, Chief Financial Officer

Prakash Darji, General Manager, Digital Experience

Bill Cerreta, General Manager, Hyperscale

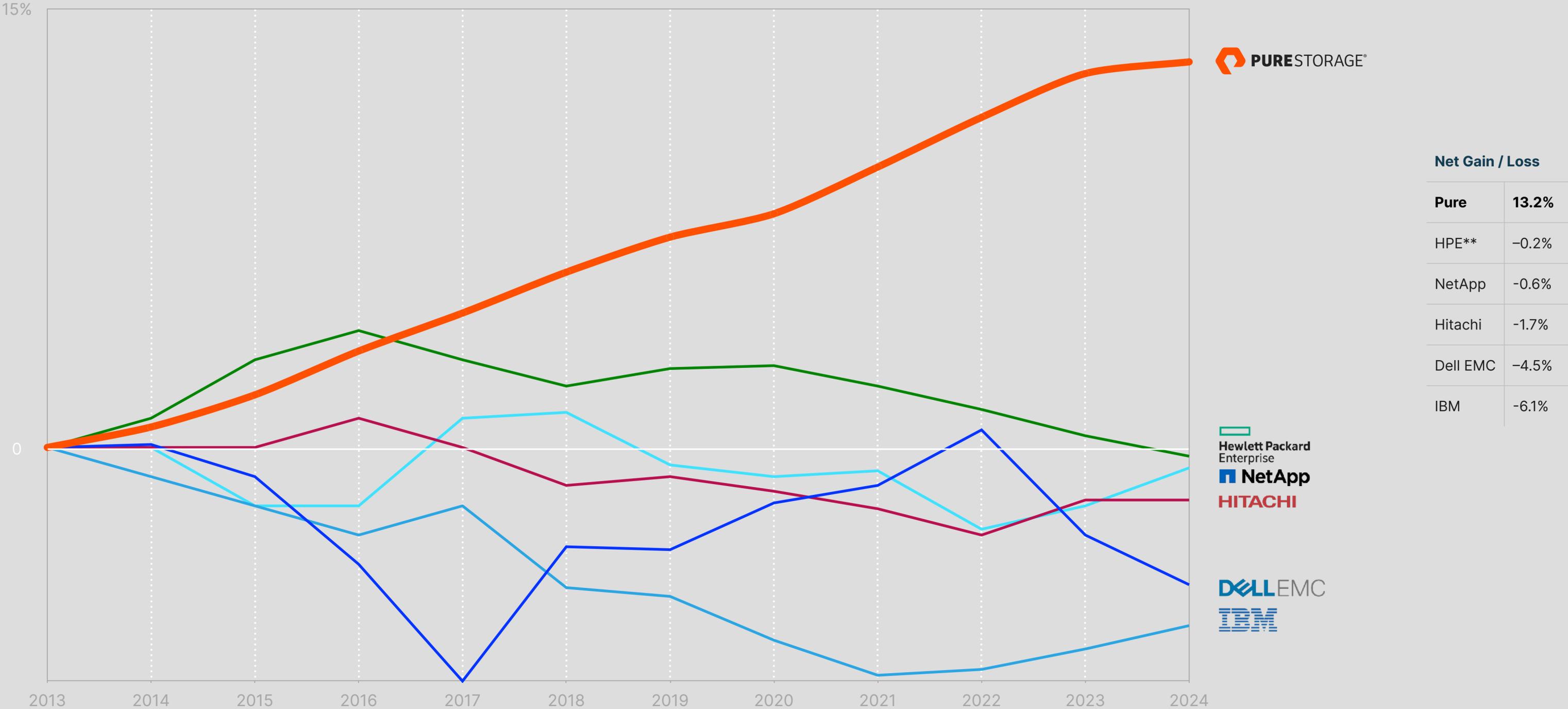
Paul Ziots, Vice President, Investor Relations

# Pure's Platform Strategy and the Enterprise Data Cloud

**Charles Giancarlo**  
Chief Executive Officer



# 11 Year Enterprise Storage Market Share



# Q2

**48%**

of revenue in subscriptions

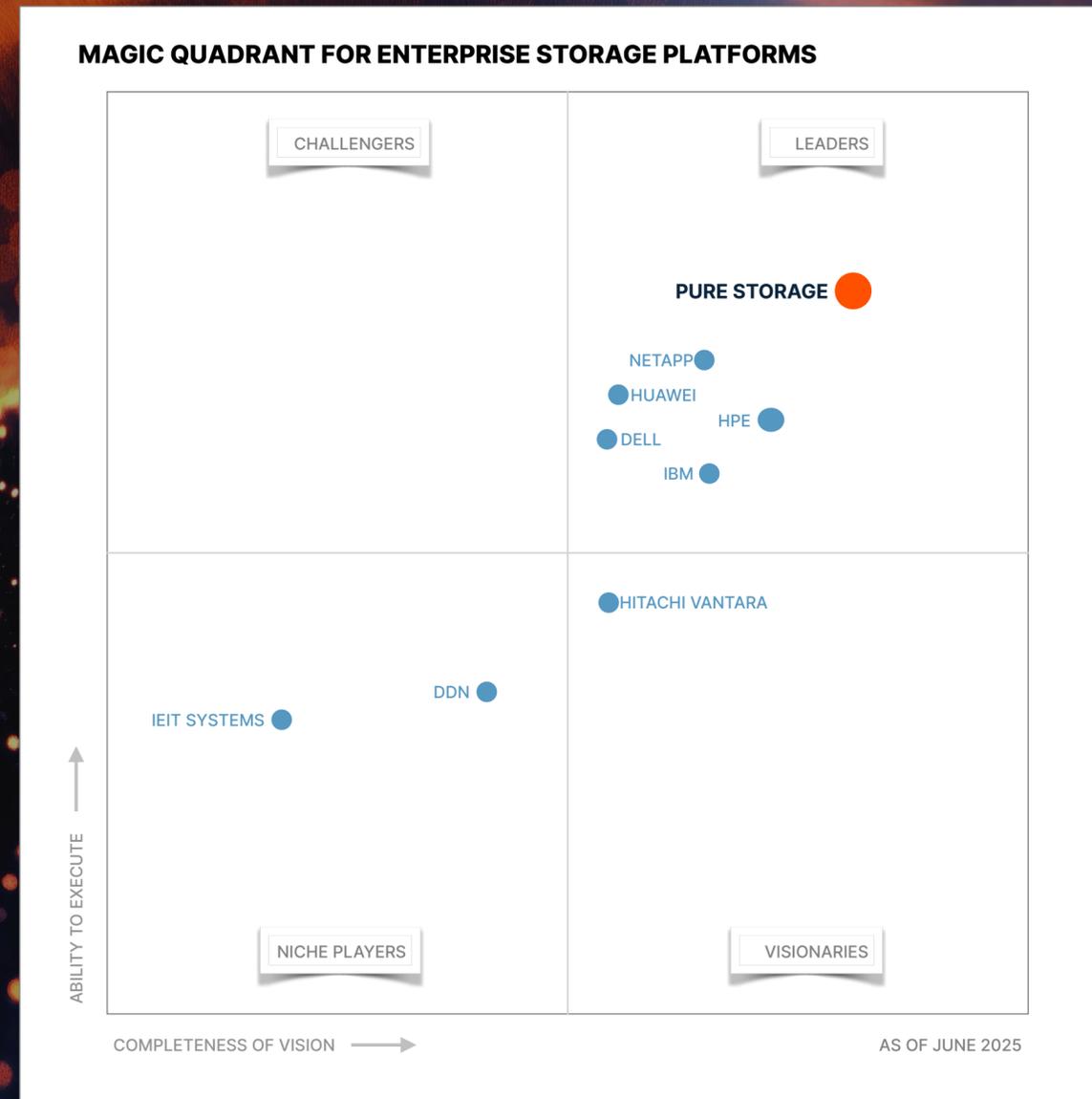
**\$861M**

13% Y/Y growth  
15% operating margin

**20%**

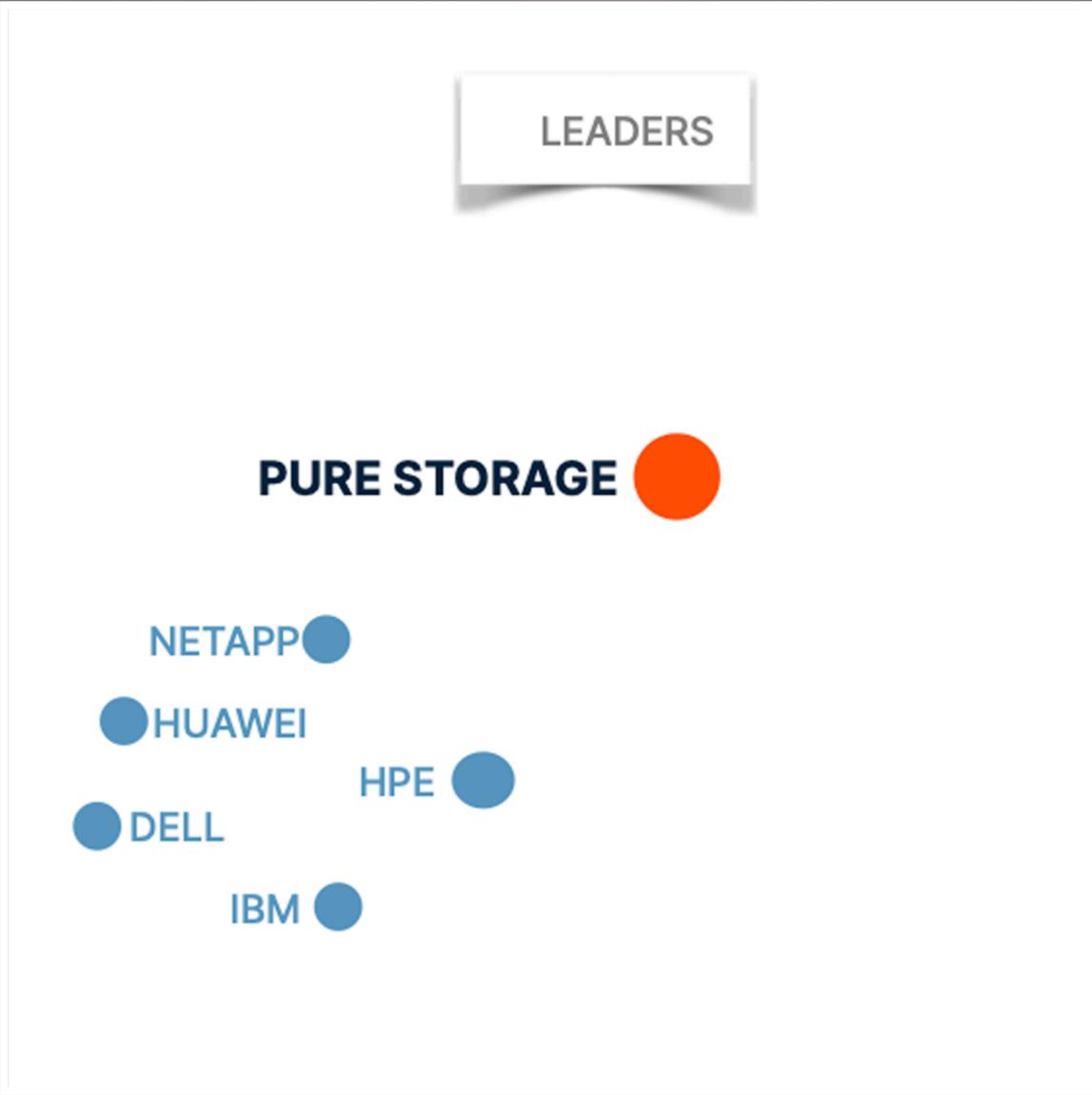
of revenue invested in R&D

# MQ for Enterprise Storage Platforms



Gartner

# MQ for Enterprise Storage Platforms



Gartner

81

Net Promoter Score  
(3rd Party Measured)





Better

AI

Software



Data





# Enterprise Data

# Enterprise Data Center Architecture

Switches

Compute

Storage

DATABASE

VIRTUALIZATION

FILE SHARE

BACKUP



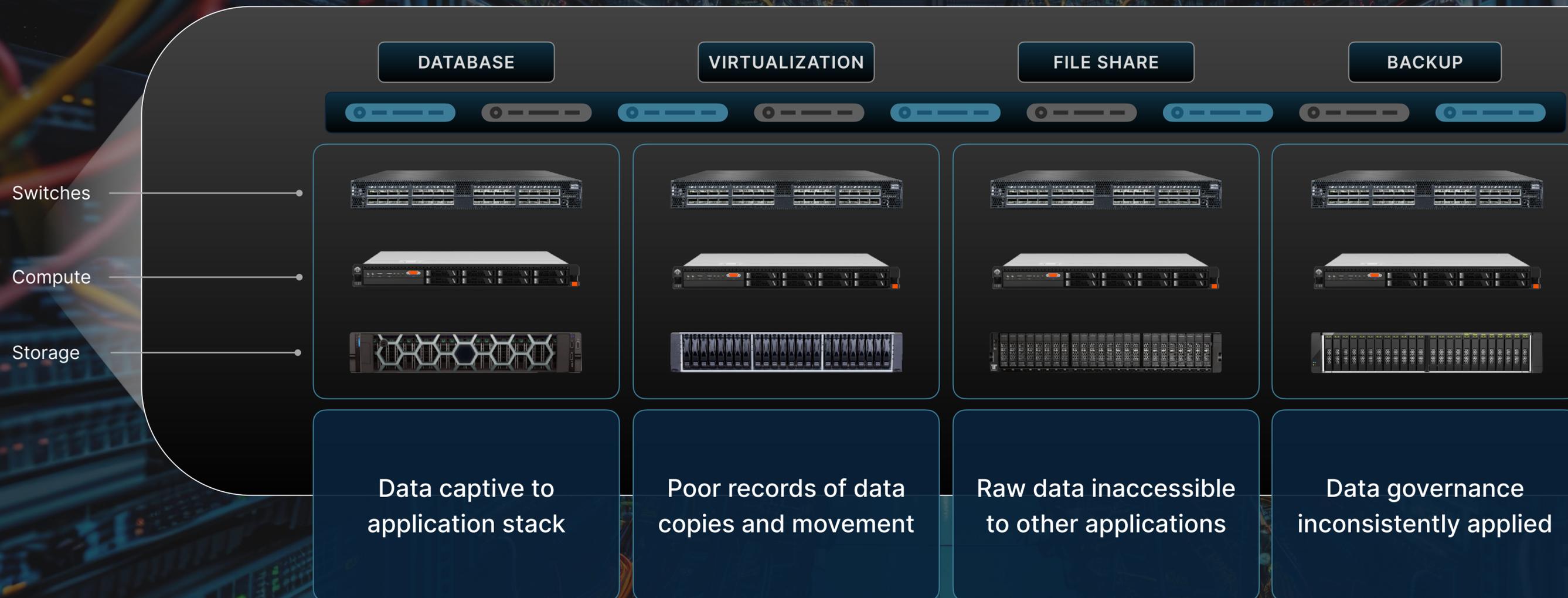
Arrays are managed and provisioned individually

Can't share capacity or performance with other arrays

New services allocated and configured manually

Data governance standards applied manually

# Inconsistent Data Management



**This is not  
the way clouds  
operate**

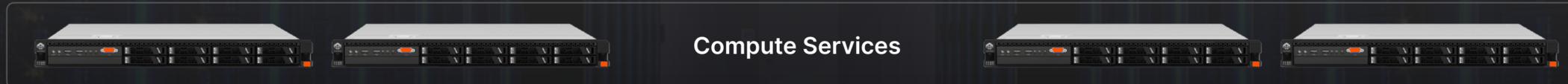
Data Center Management Services

Network Services



Network

Compute Services



Network

Storage Services



HIGH PERFORMANCE

MID PERFORMANCE

LOW COST

ARCHIVE

Software  
Defined

Enterprise Storage Architecture  
is **Vertical**

Cloud Storage Architecture  
is **Horizontal**

**Enterprise Storage Architecture**  
is **Manual**

**Cloud Storage Architecture**  
is **Fully Automated**

**Enterprise Storage Architecture**  
creates **Data Silos**

**Cloud Storage Architecture**  
creates **Accessible Data Pools**

Enterprise Storage Architecture  
is **Physical**

Cloud Storage Architecture  
is **Virtual**



# A Vision for a **New Era of Data**





DATA REDUCTION

RESILIENCY

ENCRYPTION

RECOVERY

SAFEMODE

EVERGREEN



BLOCK

FILE

OBJECT

COMMON OPERATING ENVIRONMENT

EVERGREEN ARCHITECTURE

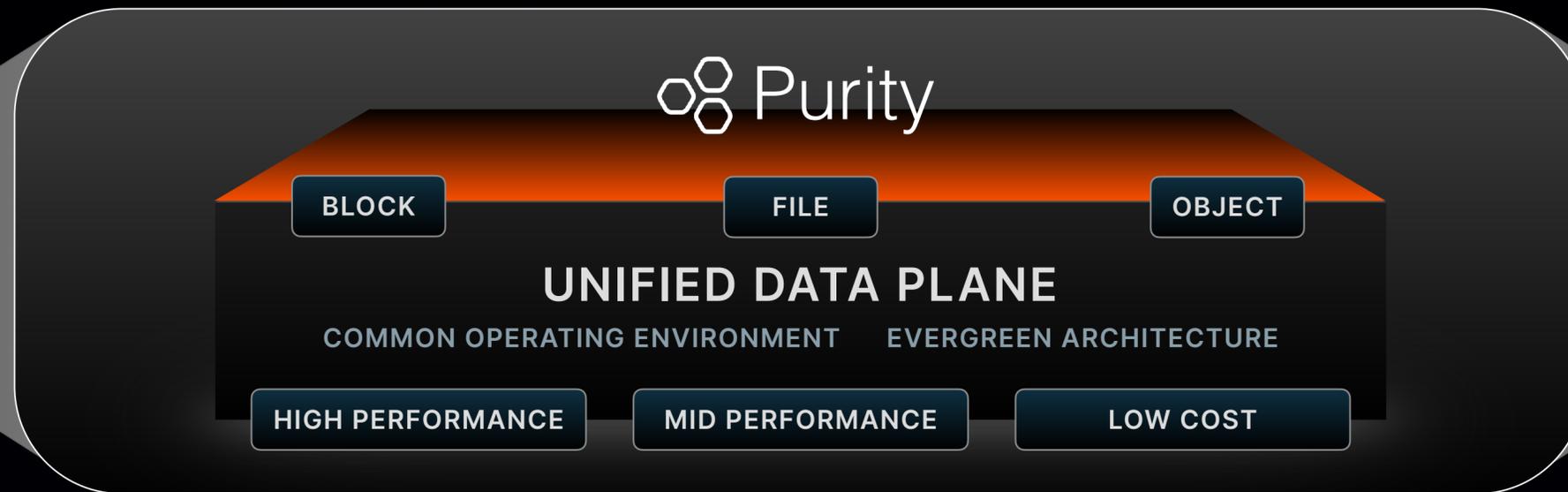
HIGH PERFORMANCE

MID PERFORMANCE

LOW COST



 Evergreen//One™  
Delivered  
As-a-Service



 Pure1®  
Management



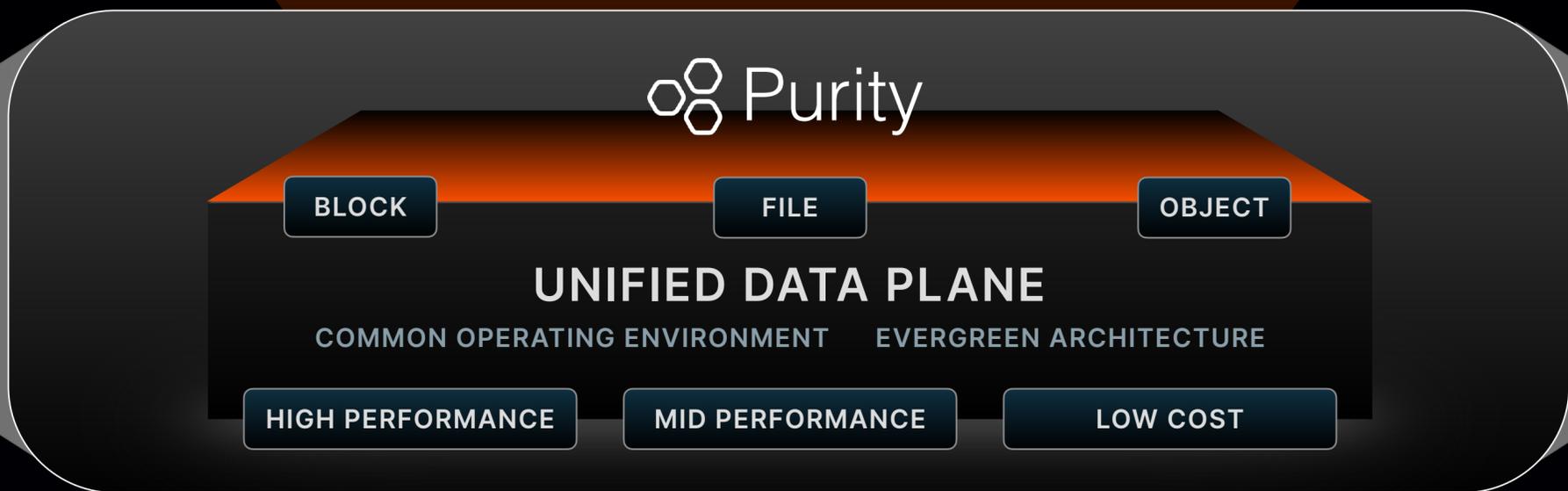
### ENTERPRISE APPS

### MODERN APPS

- DATABASE
- VIRTUALIZATION
- FILE SHARE
- BACKUP
- MODVIRT
- ML/AI
- CONTAINERS

SUPPORTS ALL WORKLOADS/WORKFLOWS

Evergreen//One™  
Delivered  
As-a-Service



Pure1®  
Management



ENTERPRISE APPS

MODERN APPS

- DATABASE
- VIRTUALIZATION
- FILE SHARE
- BACKUP
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- ML/AI
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SUPPORTS ALL WORKLOADS/WORKFLOWS



BLOCK

FILE

OBJECT

UNIFIED DATA PLANE

COMMON OPERATING ENVIRONMENT EVERGREEN ARCHITECTURE

HIGH PERFORMANCE

MID PERFORMANCE

LOW COST

Evergreen//One™  
Delivered  
As-a-Service

Pure1®  
Management



ENTERPRISE APPS

MODERN APPS

- DATABASE
- VIRTUALIZATION
- FILE SHARE
- BACKUP
- MODVIRT
- ML/AI
- CONTAINERS

SUPPORTS ALL WORKLOADS/WORKFLOWS

INTELLIGENT CONTROL PLANE



BLOCK

FILE

OBJECT

UNIFIED DATA PLANE

COMMON OPERATING ENVIRONMENT EVERGREEN ARCHITECTURE

HIGH PERFORMANCE

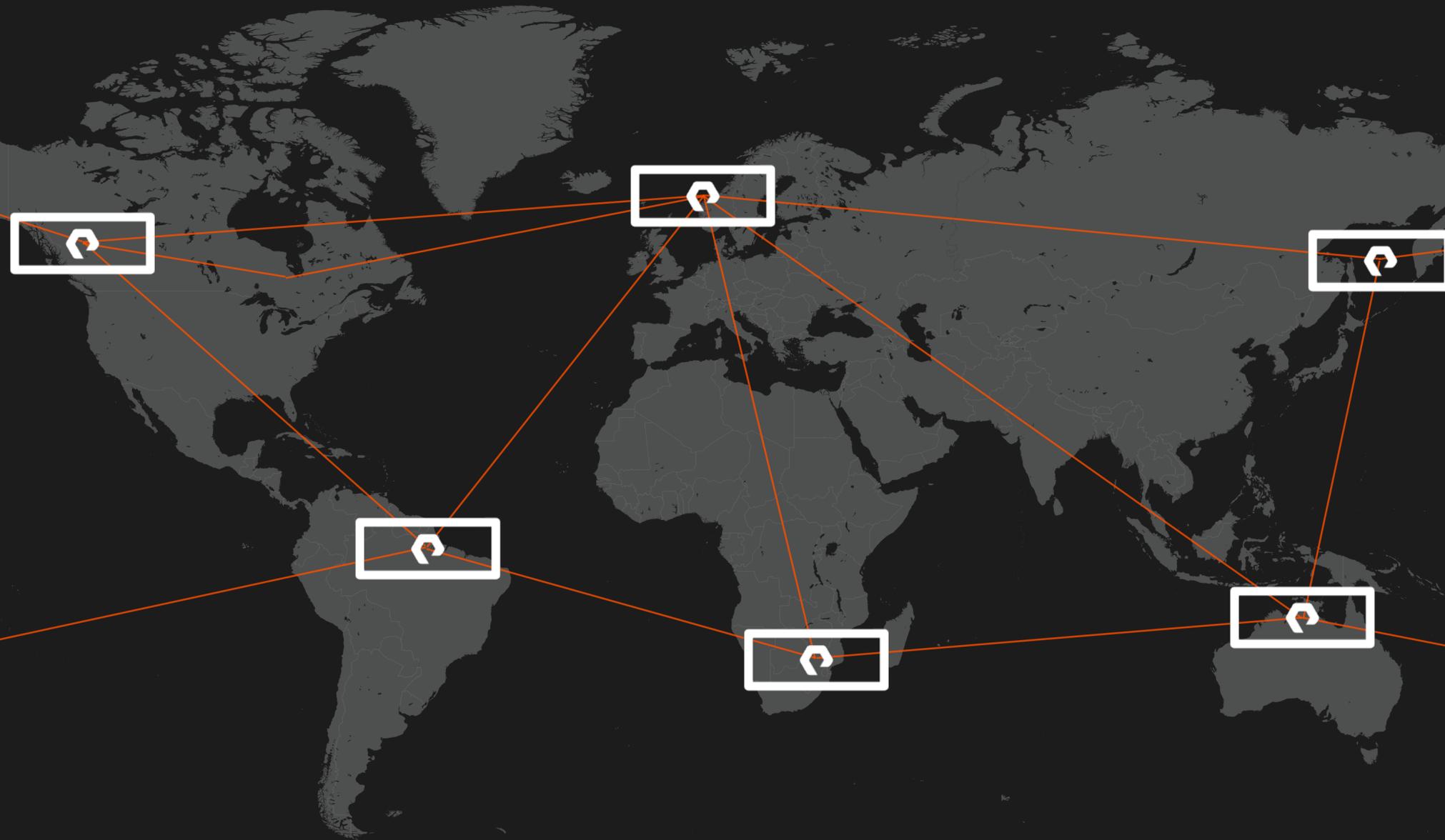
MID PERFORMANCE

LOW COST

Evergreen//One™  
Delivered  
As-a-Service

Pure1®  
Management

# The Pure Storage Platform Enables A Global **Enterprise Data Cloud**





# Enterprise Data Cloud

# Captive Arrays **Manual**

**Manual** Provisioning

Dedicated Capacity and Performance

Governance: **Manual**

Protection: Array by Array

Data Captive to App Stack

# Data Cloud **Automated**

**Auto** Provisioning

**Auto** Load Balancing

Global Governance by Software

Protection by Policy

Raw Data **Globally Accessible**

Make Your Production Data  
Your Data Lake

# Enterprise Data Cloud

Replace Your Siloed Data  
With a Data Cloud



# FY26 Enterprise Launches

## Intelligent Control Plane

### H1

- **Fusion Presets**
- **Workflow Orchestration**
  - Pure AI Copilot
  - Pure Protect for VMware
  - Rubrik threat alerting
  - CrowdStrike LogScale

### H2

- **MCP Server Copilot**
- **Fusion for Portworx**
  - Portworx Pure1 AI Copilot
  - Workflow Automation Recipes

## Unified Data Plane

### H1

- **FlashBlade//EXA**
- FA XL R5
- FlashArray//ST
- FlashBlade//S R2
- FlashArray Object

### H2

- **Pure Storage Cloud**
- **KV Store**
- Nvidia Dynamo
- **Enhanced Data Reduction EDRR**

## SLA Expansions

### H1

- **Evergreen//One Adaptive Tier**
- Evergreen//One Medical Imaging
- Evergreen//One Snapshot Packages
- Evergreen//One Lower UDR Minimum

## Cyber Resilience

### H2

- Identity and Access Management
- TPM and UEFI Secure Boot
- Bring Your Own Key
- Real-Time Threat Evaluation and Response
- CrowdStrike real-time threat intelligence
- Real Time Malware Scanning/Remediation
- Threat Detection
- Resilience as a Service with Veeam
- Application-Level Recovery

# Introducing FlashBlade//EXA

FlashBlade **//EXA**



**//EXA**

FlashBlade **EXA**



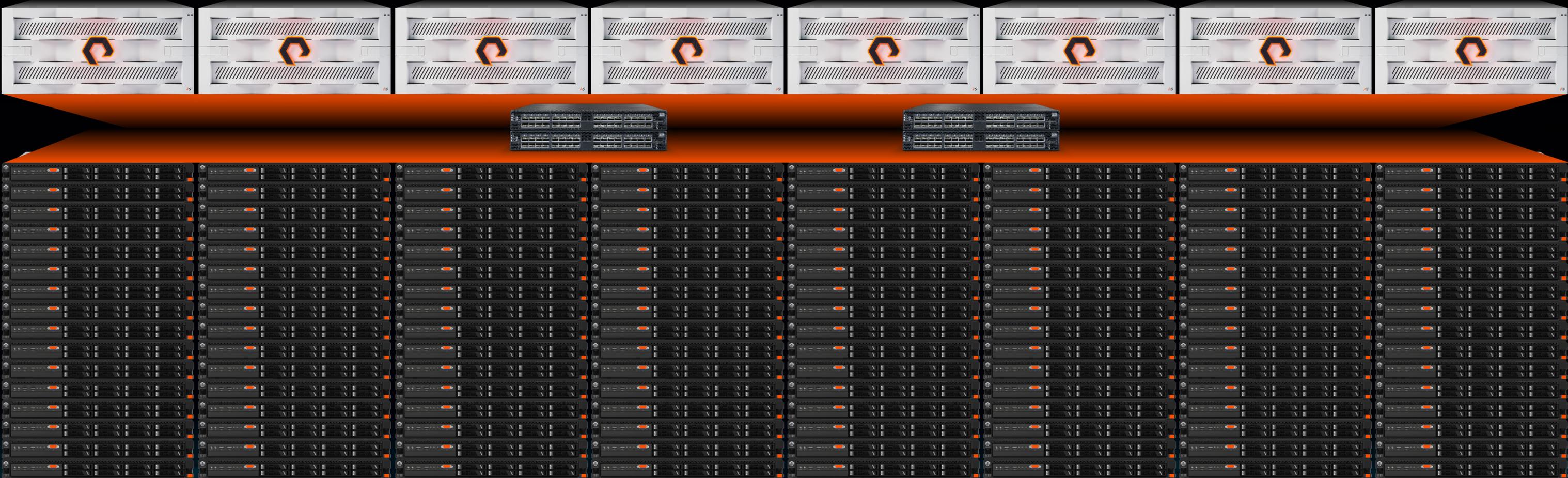
FlashBlade **EXA**



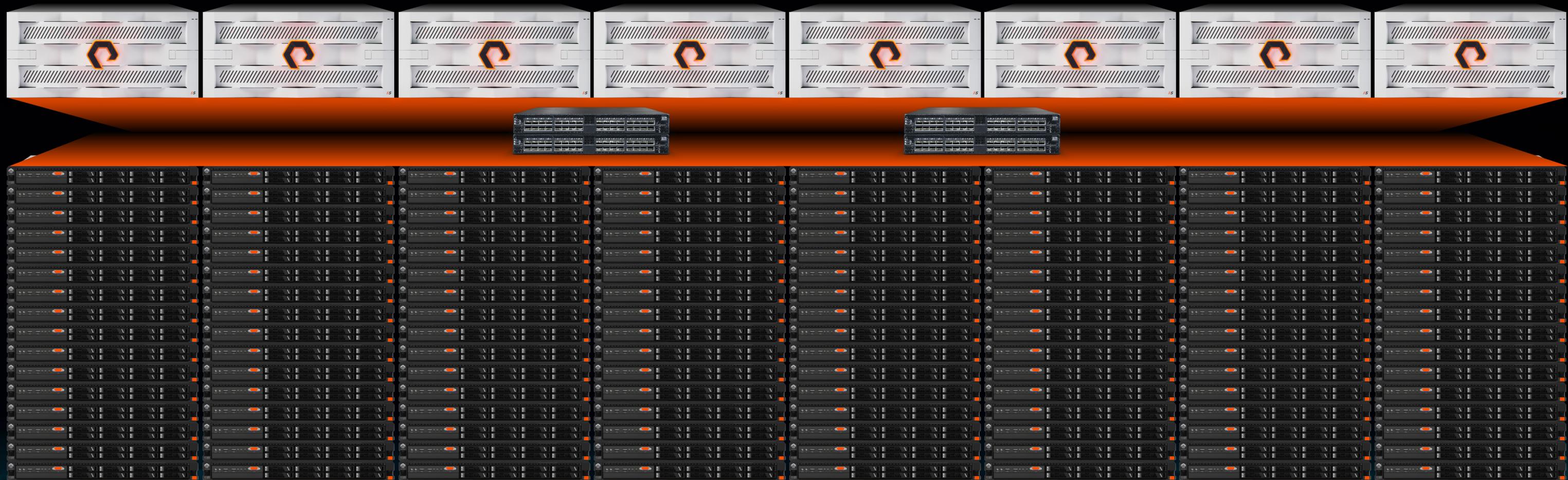
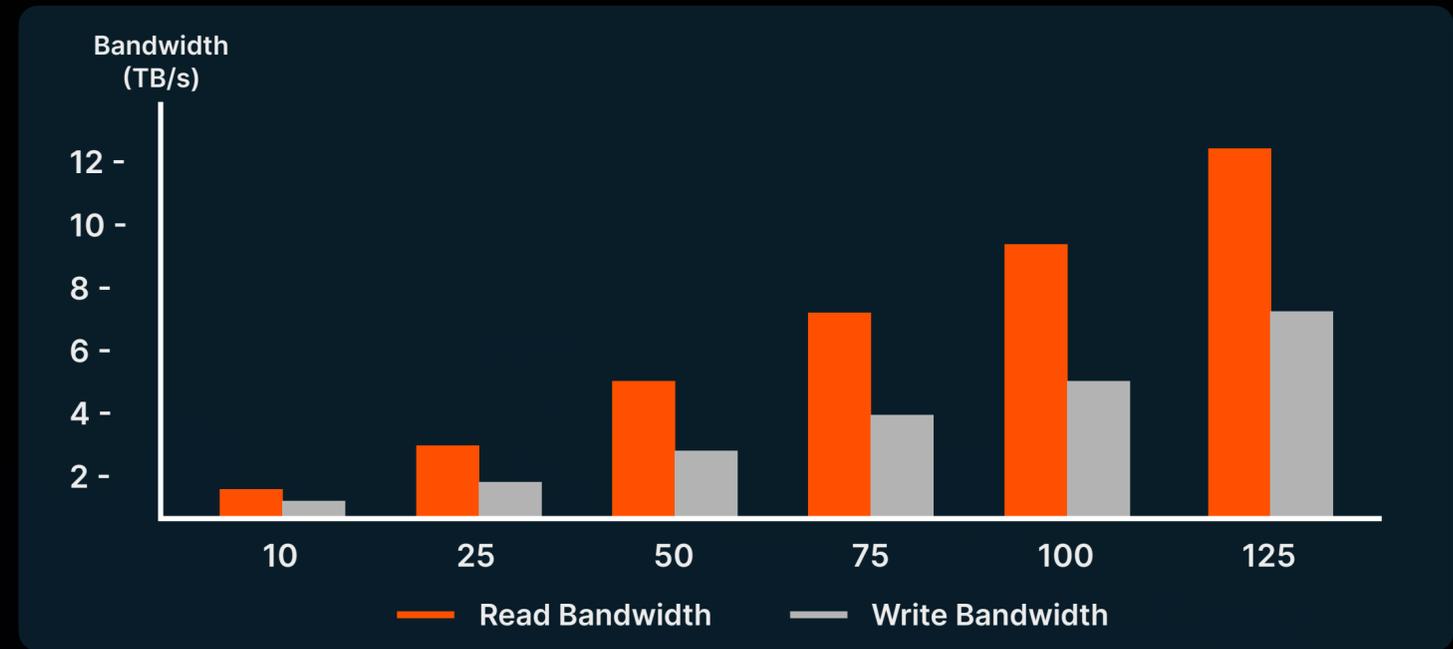
# FlashBlade **EXA**



# FlashBlade **EXA**



# FlashBlade **EXA**



# Complete AI Scale Coverage

100,000+ GPUs

Hyperscalers

AI Natives

Tech Titans

GPU Clouds

Research Clusters

1000 GPUs

Enterprise

Commercial

# Complete AI Scale Coverage

100,000+ GPUs Hyperscalers

 DirectFlash

AI Natives

Tech Titans

GPU Clouds

Research Clusters

FlashBlade *//EXA*

1000 GPUs Enterprise

FlashBlade *//S*™

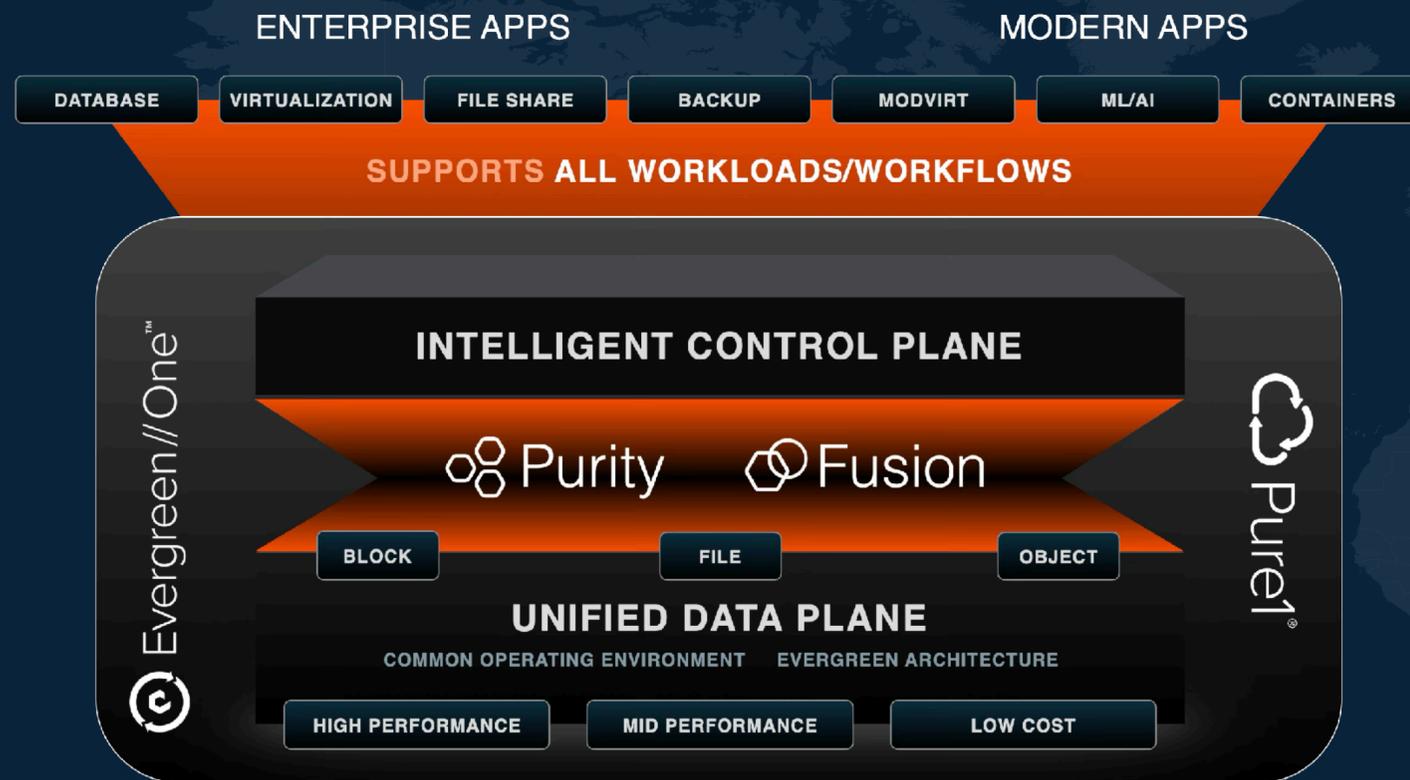
Commercial

 Purity

 Evergreen™

# Your **Scalable** Enterprise Data Cloud

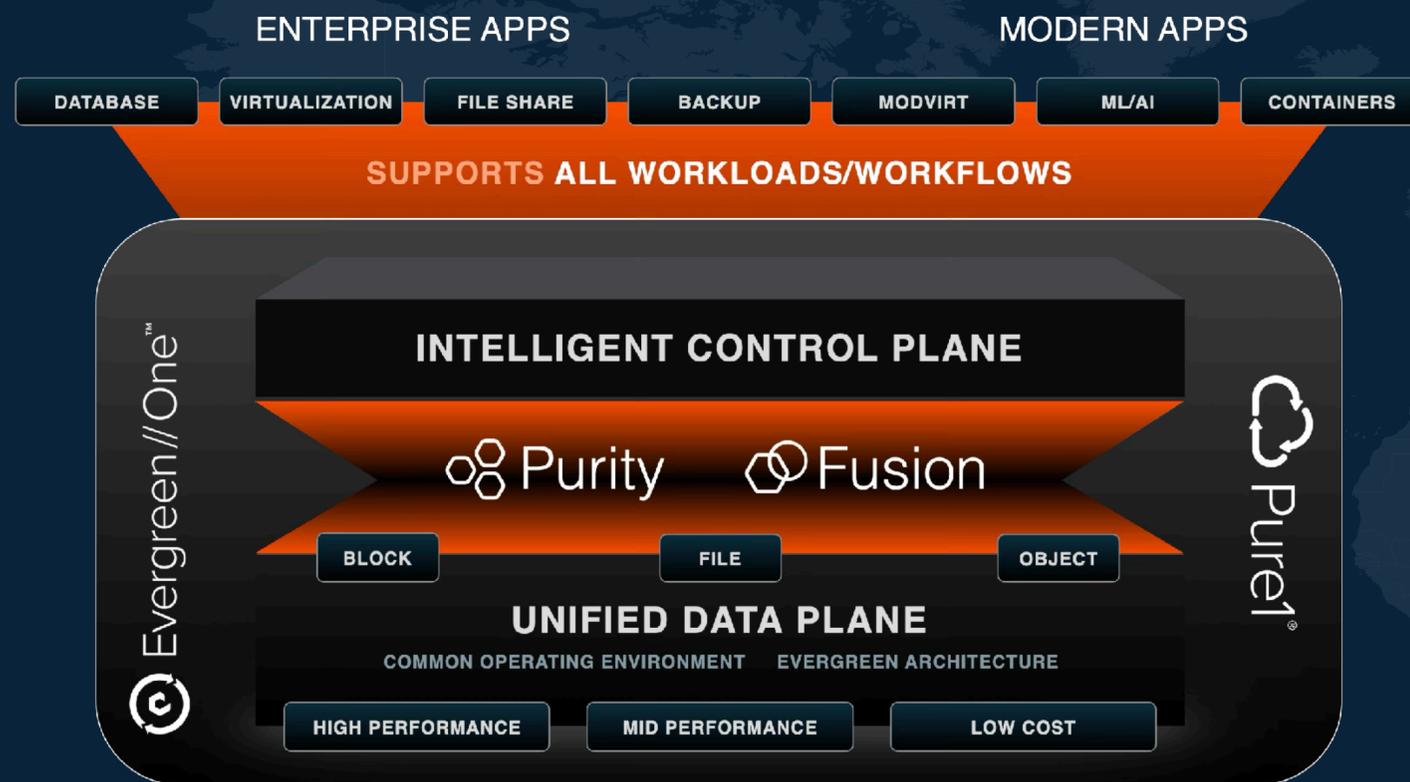
Delivered by the Pure Storage Platform



Virtualized Cloud of Data

# Your **Consistent** Enterprise Data Cloud

Delivered by the Pure Storage Platform

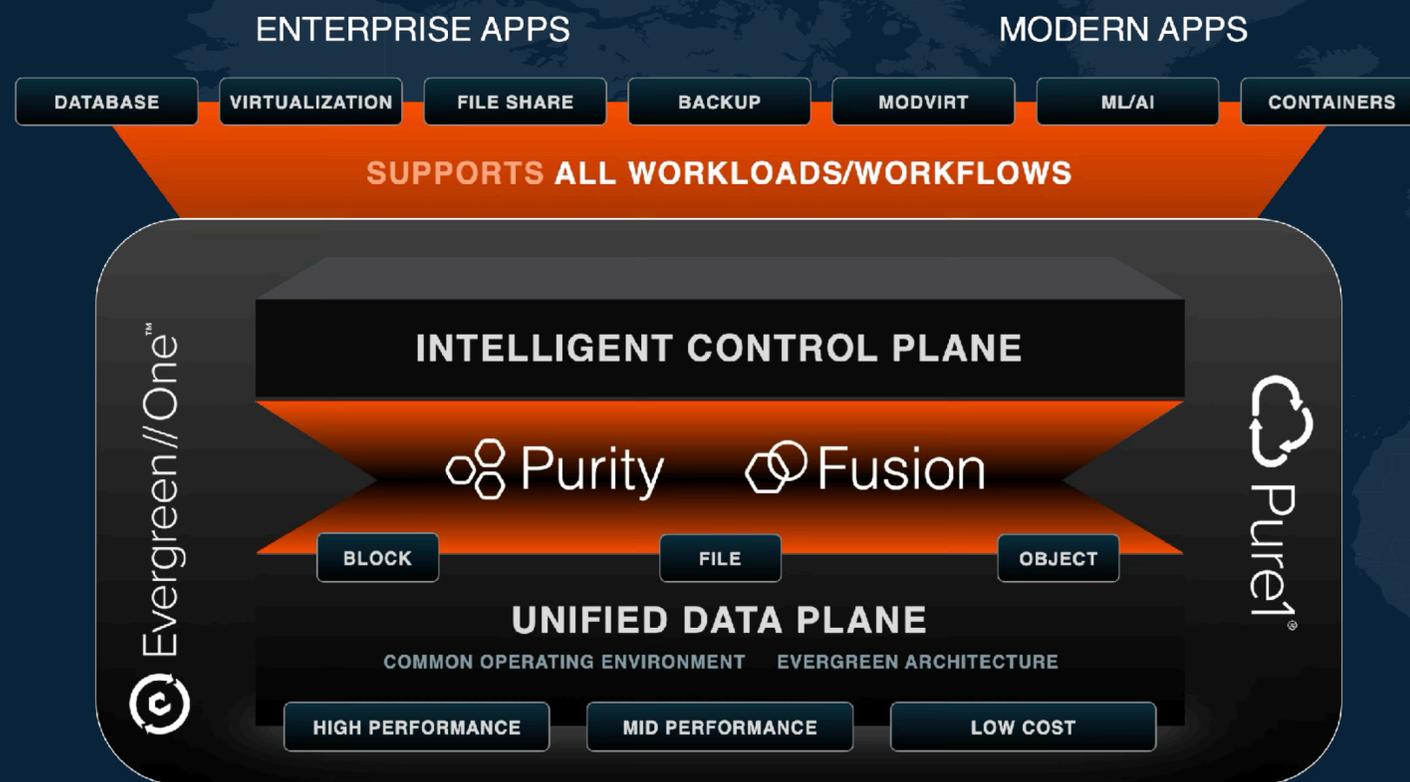


Virtualized Cloud of Data

Consistent Environment - All Workloads

# Your **Reliable** Enterprise Data Cloud

Delivered by the Pure Storage Platform



Virtualized Cloud of Data

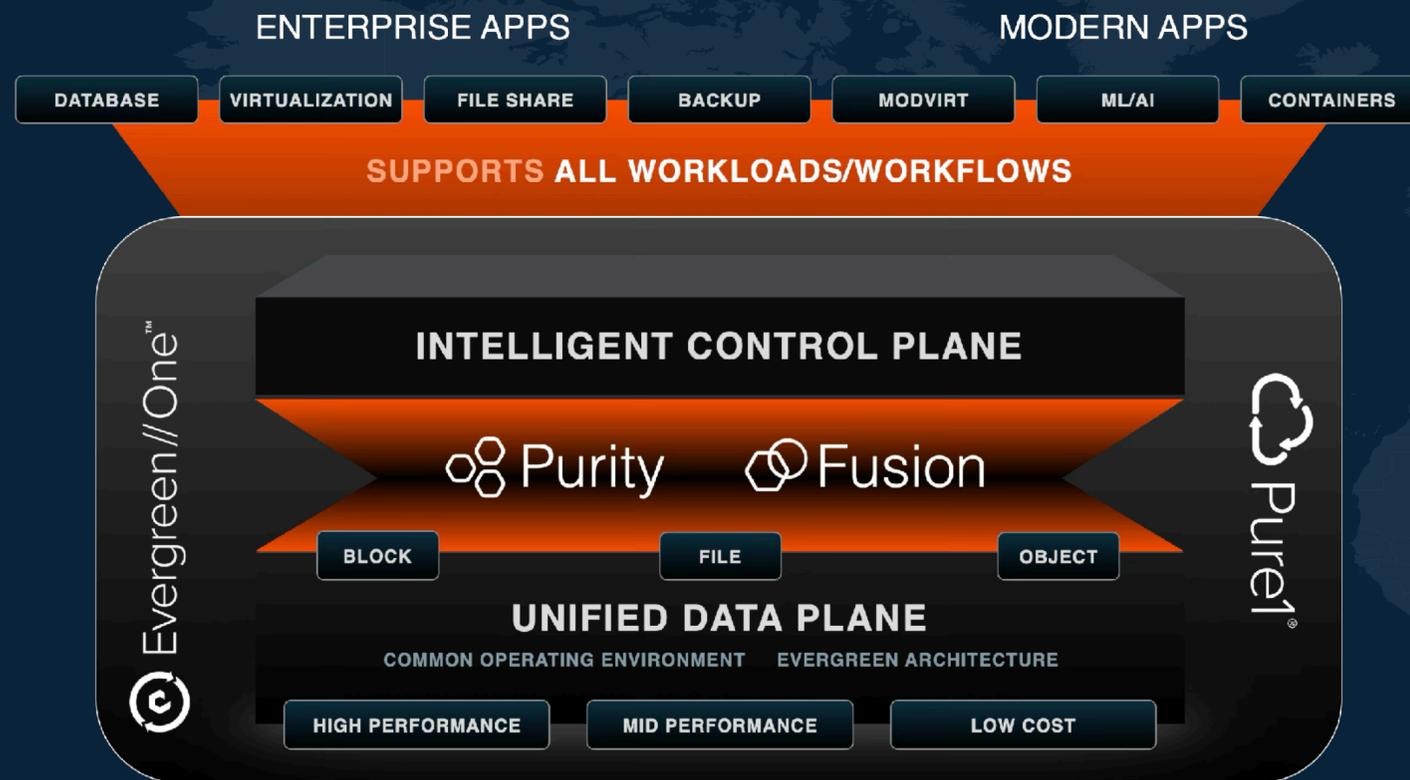
Consistent Environment - All Workloads

Autonomous Data Governance

Built-In Cyber Resilience

# Your **Evergreen** Enterprise Data Cloud

Delivered by the Pure Storage Platform



Virtualized Cloud of Data

Consistent Environment - All Workloads

Autonomous Data Governance

Built-In Cyber Resilience

Software Defined, Global Scalability

# Thank You



# Pure's Fundamental Advantages

**Rob Lee**

Chief Technology Officer

# Agenda

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Differentiated IP Across Storage

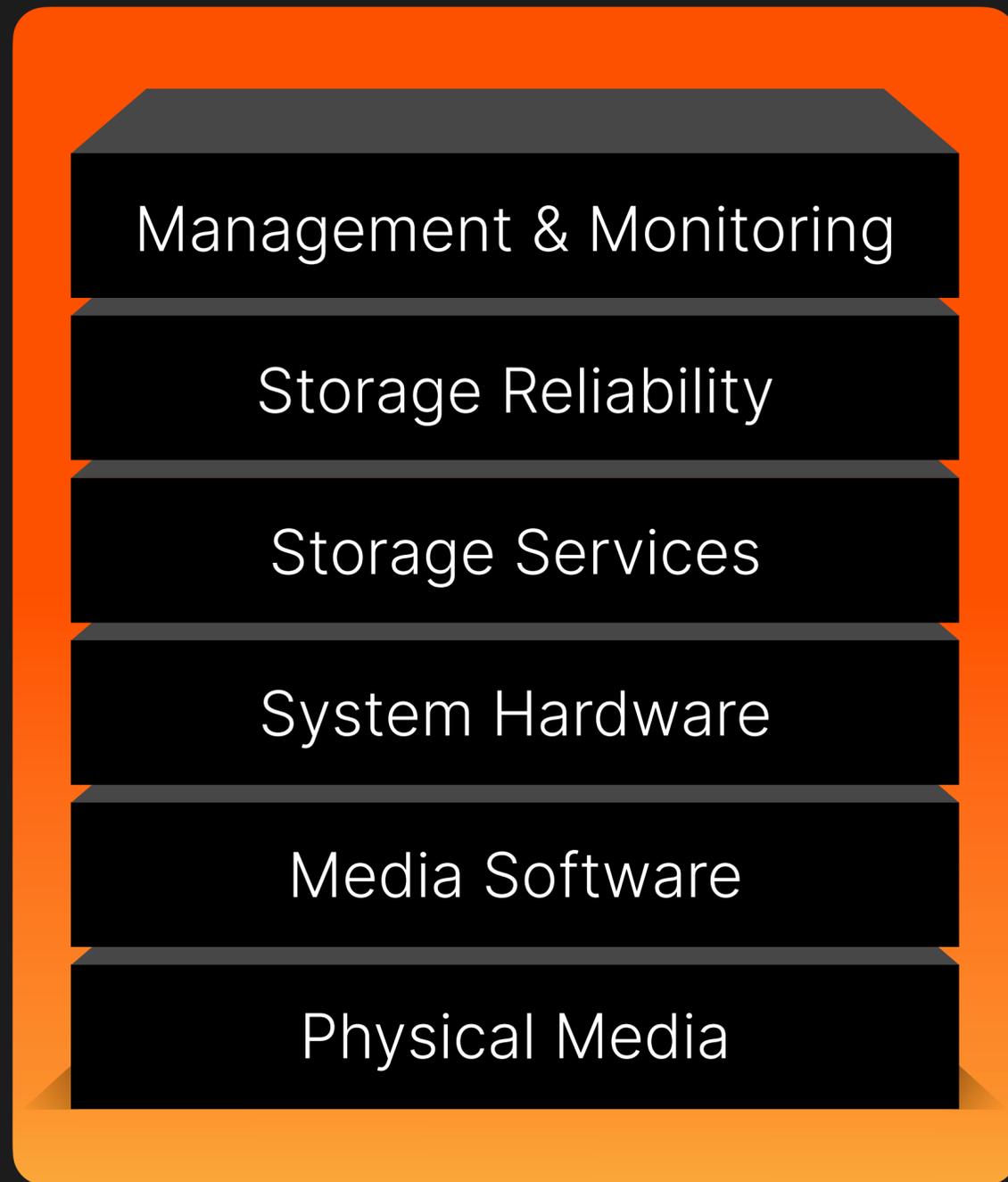
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Packaged Uniquely Across Markets

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Scalable Metadata Powering AI

# Anatomy of a Storage System



## **Manage, Monitor, and Administrate**

How is the system managed? How is access administered?

## **Protect Data and Access From Faults**

Availability and resiliency. Data protection, snapshots, replication etc.

## **Organize, Store, and Retrieve Data**

Core storage capabilities – block, file, object.  
Performance and protocols

## **Surrounding Hardware**

Hardware systems that the storage and the software that controls it is delivered in

## **Ability to Control the Physical Media**

SW to work with the physical media components.  
e.g. drivers, SSD firmware

## **Something to Store the Data On**

Physical components where data is stored.  
e.g. HDD, NAND Flash

# Pure's Differentiated IP, at Every Layer

Software Designed to Manage Flash, as Flash

## Others

- SSDs present NAND flash as an HDD
- Complex, inefficient and unreliable drive-side firmware to manage flash
- SSD architecture limits ability to scale, and introduces significant performance, reliability and efficiency tradeoffs
- Firmware and hardware validation required for each drive from each vendor



## Pure's Approach

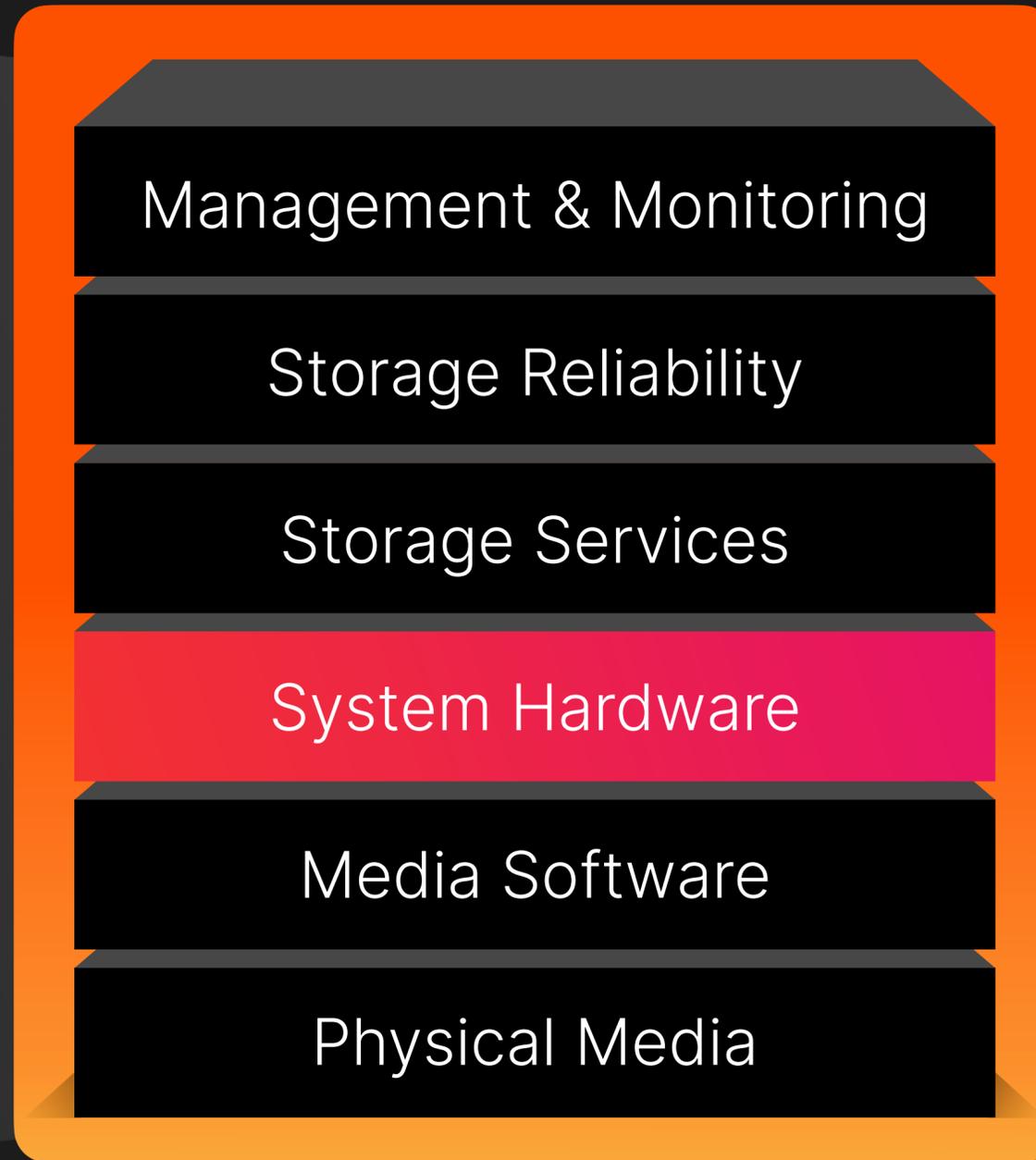
- Purpose-built to natively access NAND Flash
- Host-side flash-management and flash-translation software
- Simplifies drives and enables massive density without tradeoffs
- Host-side software allows multi-vendor freedom and fungibility

# Pure's Differentiated IP, at Every Layer

End-to-end Simplicity Drives Reliability and Longevity

## Others

- 3rd party OEM or repurposed server hardware
- Designed to be ripped and replaced every 3-5 years
- Complexity, unreliability and inefficiency bloat operating costs



## Pure's Approach

- Fully integrated systems designed to optimize reliability, power, space, and performance
- Designed for Evergreen lifecycle – fully non-disruptively modernizable
- Integrated appliances reduce networking and scale-out complexity

Integrated  
Systems



# Pure's Differentiated IP, at Every Layer

Software Designed for Modern Media and Performance

## Others

- Numerous disparate SW stacks
- Retrofit architectures from the HDD era built for 10x slower CPUs and 1,000x slower networking
- Brittle and unreliable



## Pure's Approach

- Single Purity Operating Environment
- Designed from ground-up for Flash-era for speed and scale
- Seamless transition across protocols, capacity & performance levels
- Adaptive and autonomic – no tuning or custom optimizations



# Pure's Differentiated IP, at Every Layer

Built to Enable the Cloud Operating Model

## Others

- Bolt-on observability
- Arrays are managed and provisioned individually
- Can't share capacity or performance with other arrays
- New services allocated and configured manually



## Pure's Approach

- Built-in observability & Intelligence
- Managed as Cloud-infrastructure
- SLA Optimized and designed for STaaS
- Intelligent Automation
- Managing Data Sets, not just Storage



# Differentiated Solutions for Unique Market Opportunities

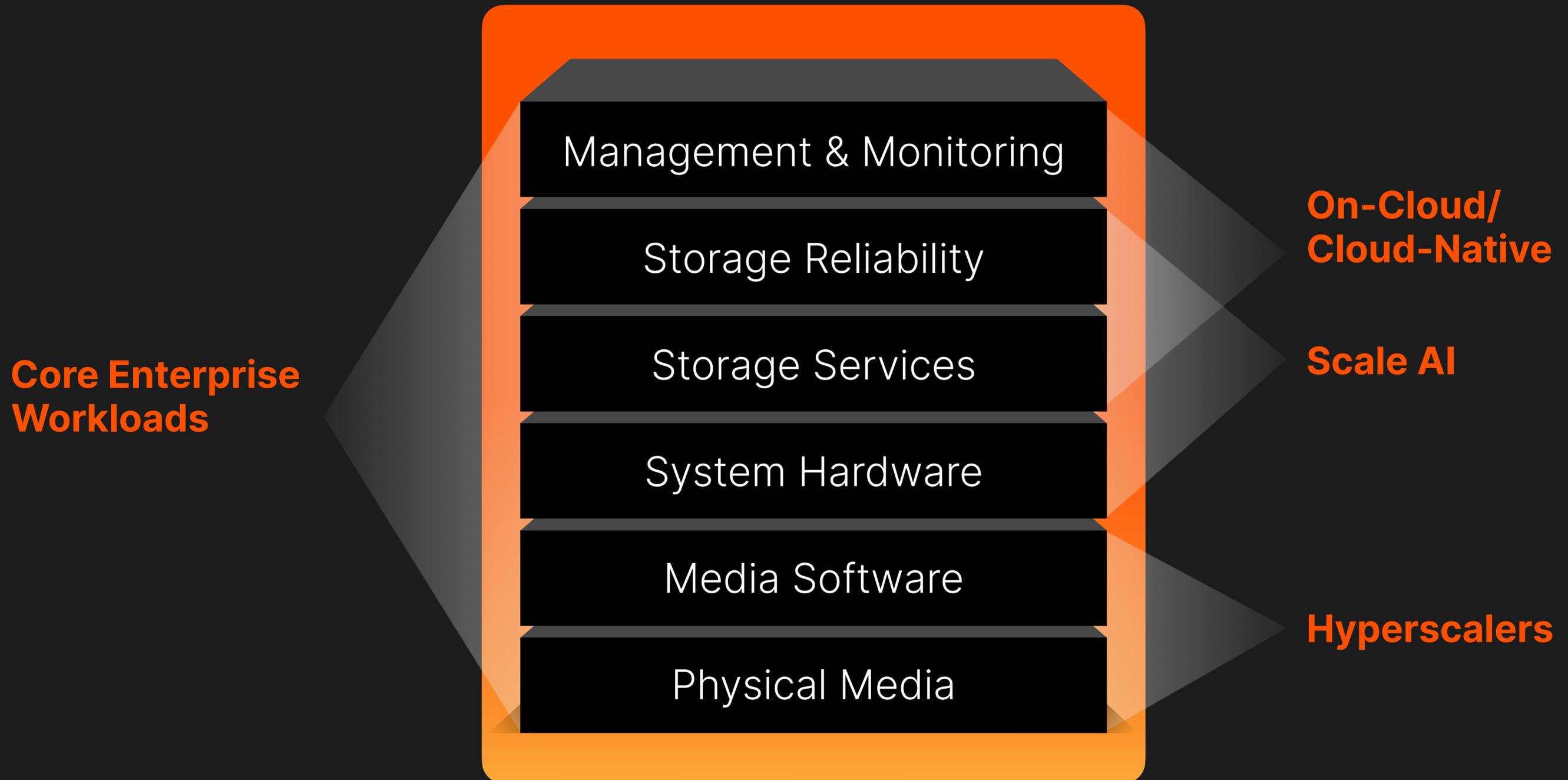
**Core Enterprise Workloads**

**On-Cloud/Cloud-Native**

**Scale AI**

**Hyperscalers**

# Differentiated Solutions for Unique Market Opportunities



# Differentiated Solutions for Unique Market Opportunities

Engineered systems (**FlashArray, FlashBlade**) provide full benefits of all layers of the stack. Tight integration provides the best simplicity and reliability, and seamless flexibility across all storage types and tiers



## Core Enterprise Workloads

Traditional enterprise data center storage supporting infrastructure ranging from databases to virtualization, to technical computing to other enterprise software workloads. These systems span block, file, and object protocols and across all performance tiers from AI to archive.

# Differentiated Solutions for Unique Market Opportunities

## On-Cloud/ Cloud-Native

Solutions generally running on public-cloud or third-party physical infrastructure services. Pure provides a **consistent layer of storage services, capabilities and data mobility** across **on-prem, hybrid and multi-cloud** environments.



**CloudBlockStore** and **Portworx** address both traditional and cloud-native applications. Increasingly, both enabling alternative virtualization options.

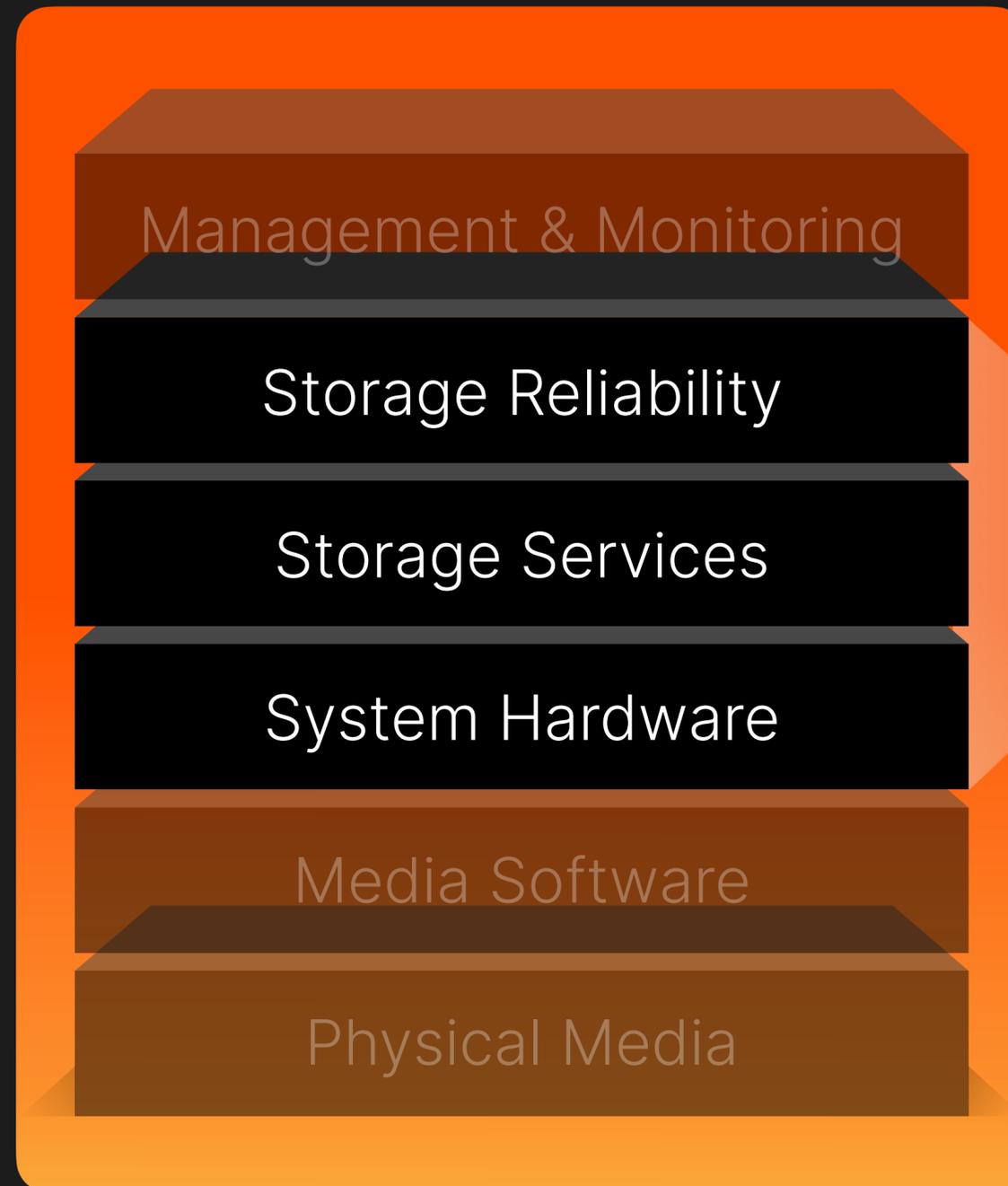
Full integration with **Pure1** and **Pure Fusion** allows customers to seamlessly run and extend their data footprint across on-prem and cloud.

**Pure Storage Cloud** further expands in-cloud options with a fully-managed 1st-party service.

# Differentiated Solutions for Unique Market Opportunities

## Scale-AI

Largest and highest-performance demanding AI environments benefit from **highly scalable file and object performance** enabled by Pure's software. Paired with an **open hardware architecture**, this allows the largest-scale environments to drive the highest levels of performance achievable.



**FlashBlade//EXA** builds on the scalability of file and object services proven by FlashBlade//S in the Enterprise. Decoupled architecture allows for 10x performance and capacity scale for the world's largest AI environments.

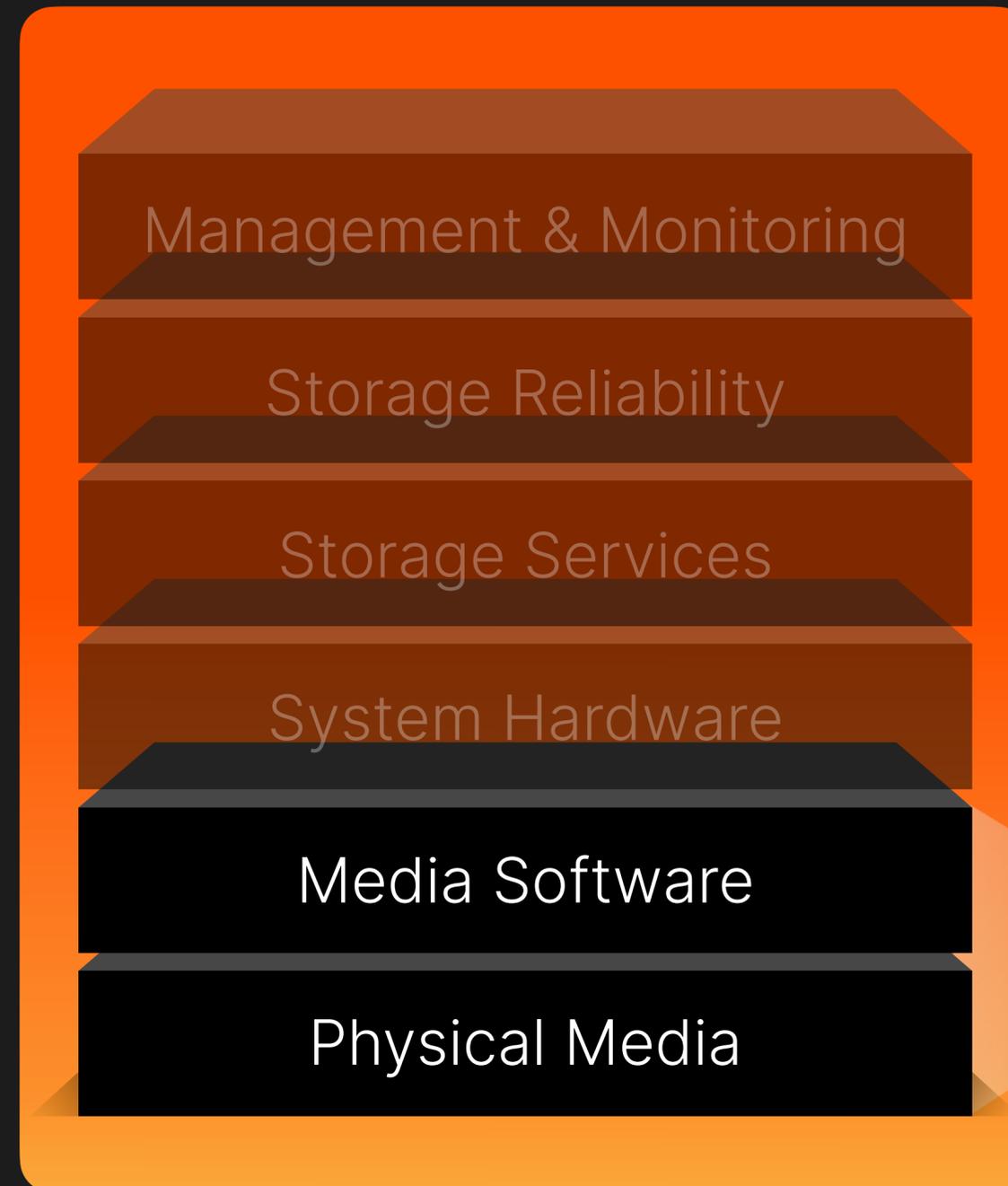
Full integration with **Pure1** brings enterprise-level proactive monitoring and support to these bleeding-edge environments.

# Differentiated Solutions for Unique Market Opportunities

## Hyperscalers

Horizontally-designed storage architectures for the largest cloud storage environments.

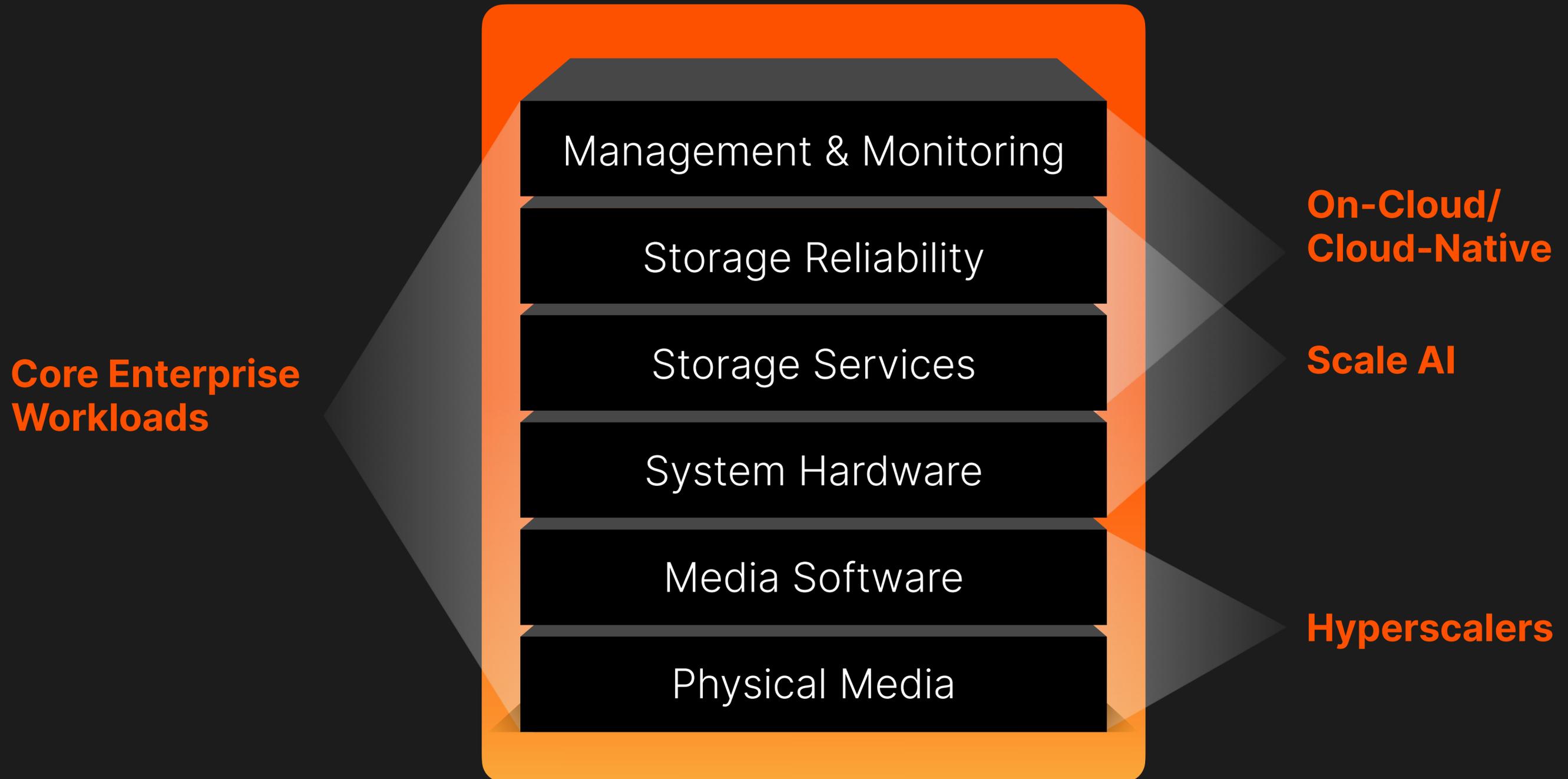
Highly engineered and customized by the hyperscalers (with their own management, storage software and system hardware), these environments benefit from a **far more consistent, efficient, reliable, predictable and performant path to NAND Flash.**



**DirectFlash software** provides Hyperscalers an easy-to-integrate way to deploy NAND flash consistently and cost-effectively.

Minimal application integration allows hyperscalers to expand deployment of this solution across multiple price-performance tiers in time and preserve optionality to lesser-performing HDD or SSD-based alternatives.

# Differentiated Solutions for Unique Market Opportunities



# Key Purity Differentiator – Scalable Metadata

## Key Challenges

### **Scaling metadata as performance and capacity scales**

Much focus is placed on data transfer rates, but metadata performance is just as important and harder to scale.

### **Organizing metadata for parallel access**

Traditional methods for organizing metadata are too serialized – designed in the era of HDD. Parallel access to data starts with Parallel access to metadata.

### **Optimizing coordination and performance scalability**

Running in parallel requires coordination. Minimizing the coordination costs maximizes scalability.

# Key Purity Differentiator – Scalable Metadata

## Pure's Approach

### Scaling metadata as performance and capacity scales

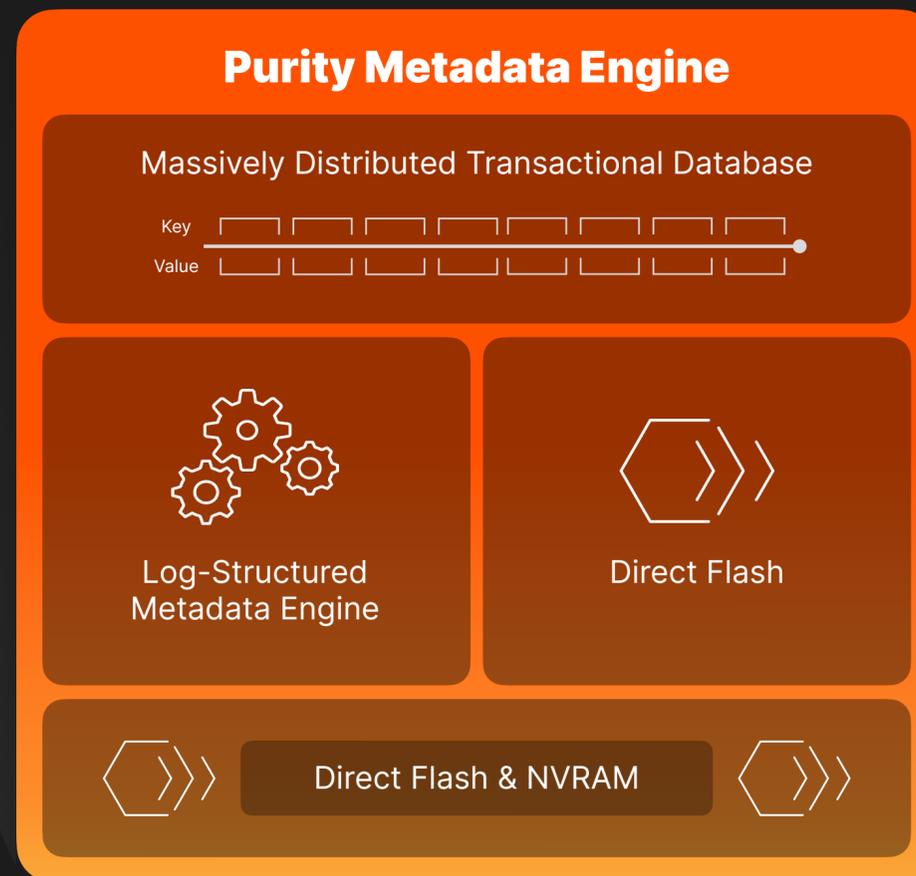
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### Optimizing coordination and performance scalability

Running in parallel requires coordination. Minimizing the coordination costs maximizes scalability.



### KV-Store Based Metadata

Optimized for maximum parallelism and properties of Flash. Key-Value based metadata allows for massive scalability and parallel performance, without introducing bottlenecks.

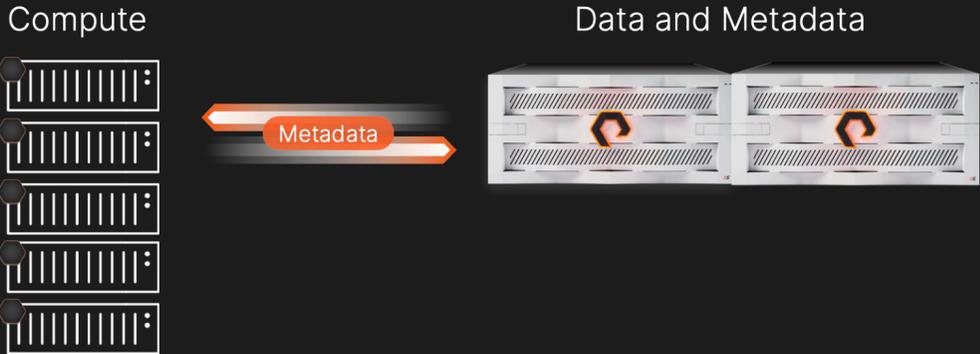
### Distributed Architecture

Highly-optimized distributed transaction-engine allows highly concurrent access, unlocking parallelism and scalable performance by reducing coordination costs.

# All-Around Performance Drives AI Platforms

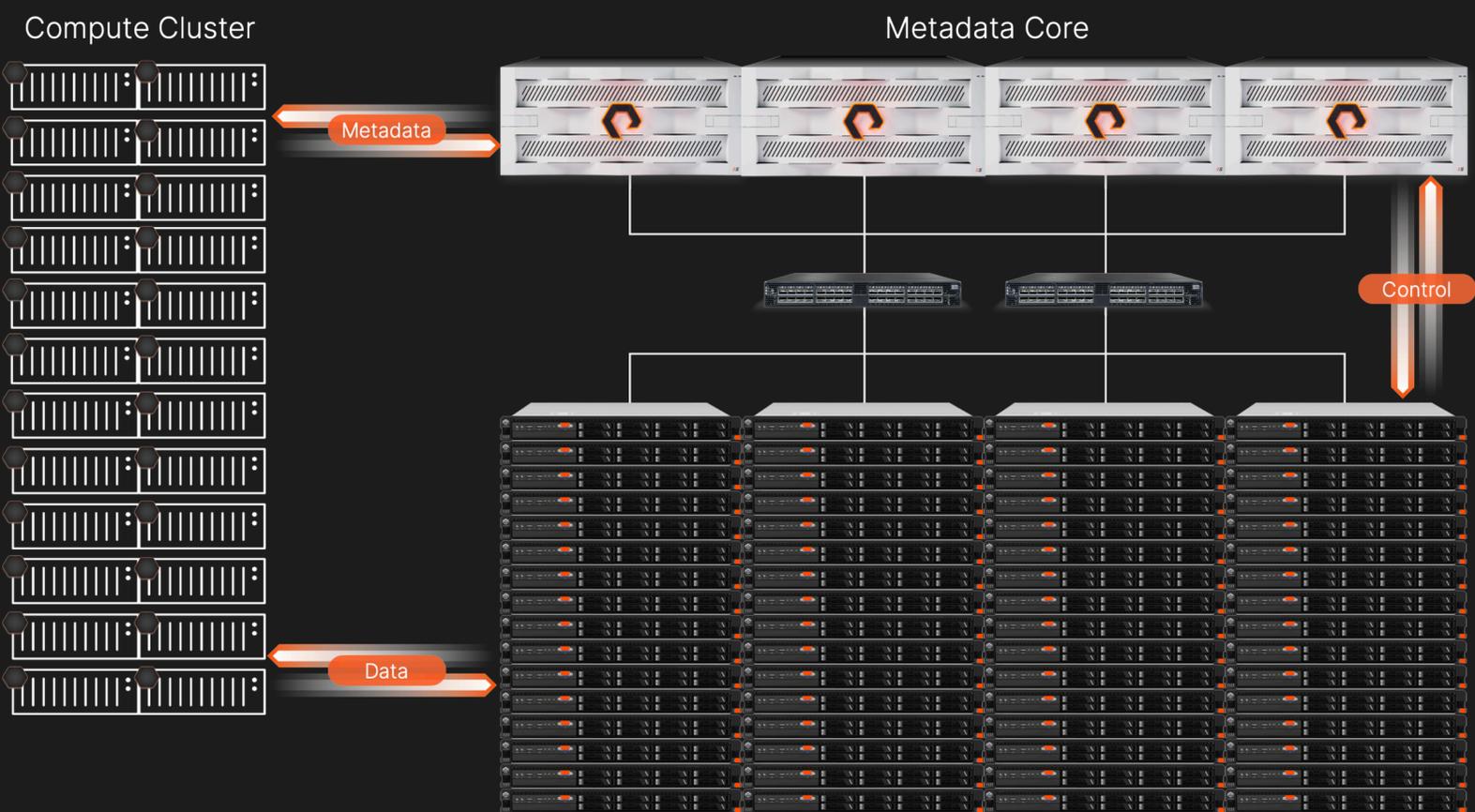
## FlashBlade//S

High-Performance Storage for Enterprise AI  
Proven AI Leadership, serving 100's of AI customers

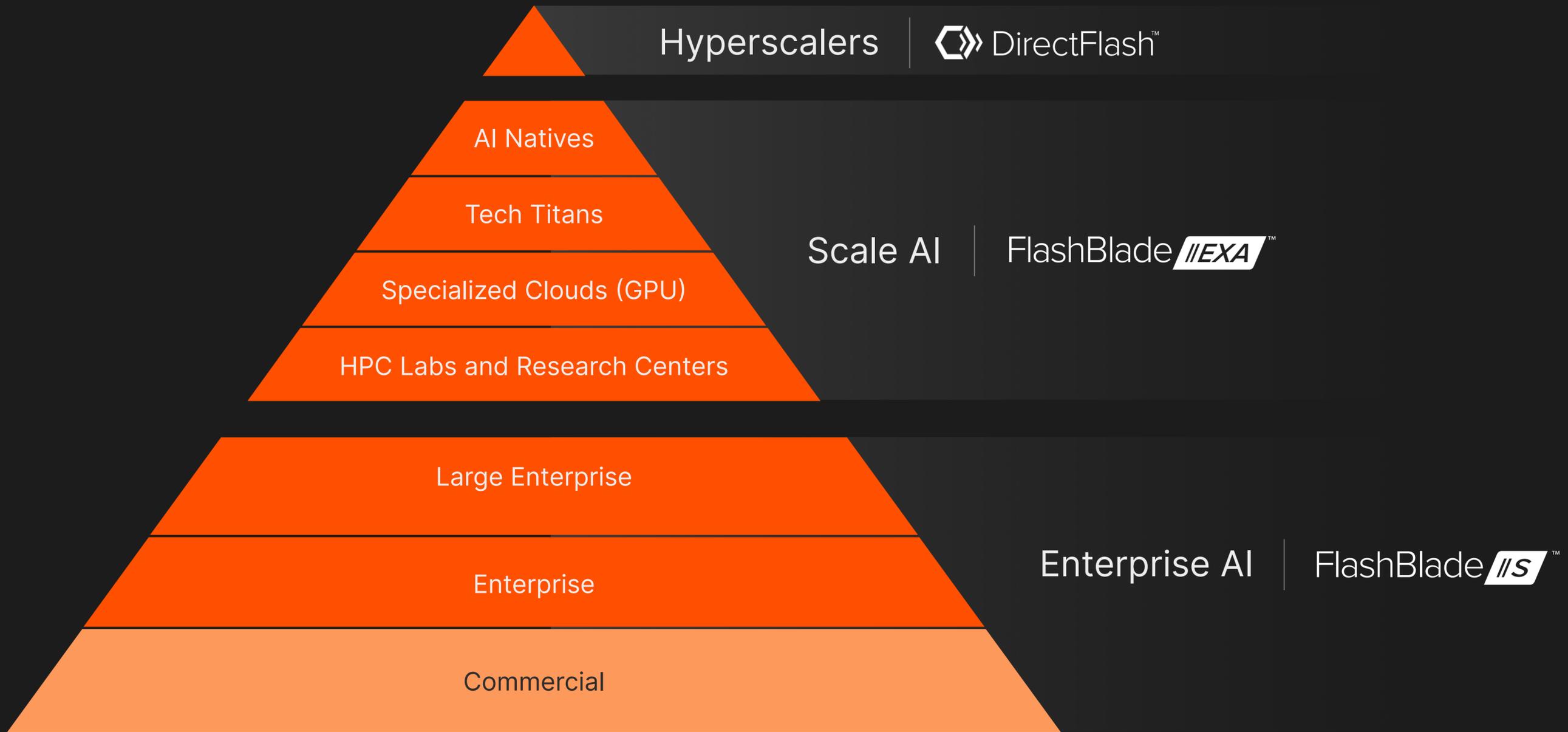


## FlashBlade//EXA

Extends FlashBlade//S to Highest-Scale AI Training  
FlashBlade SW, on Massive Scale-Out Open Architecture



# Serving AI at all Scales





# Customer Journey to Pure's Cloud Operating Model

**Prakash Darji**

General Manager, Digital Experience

# Pure's Journey to Enterprise Data Cloud Streamlines Customer Outcomes



## **Standardize @ Scale**

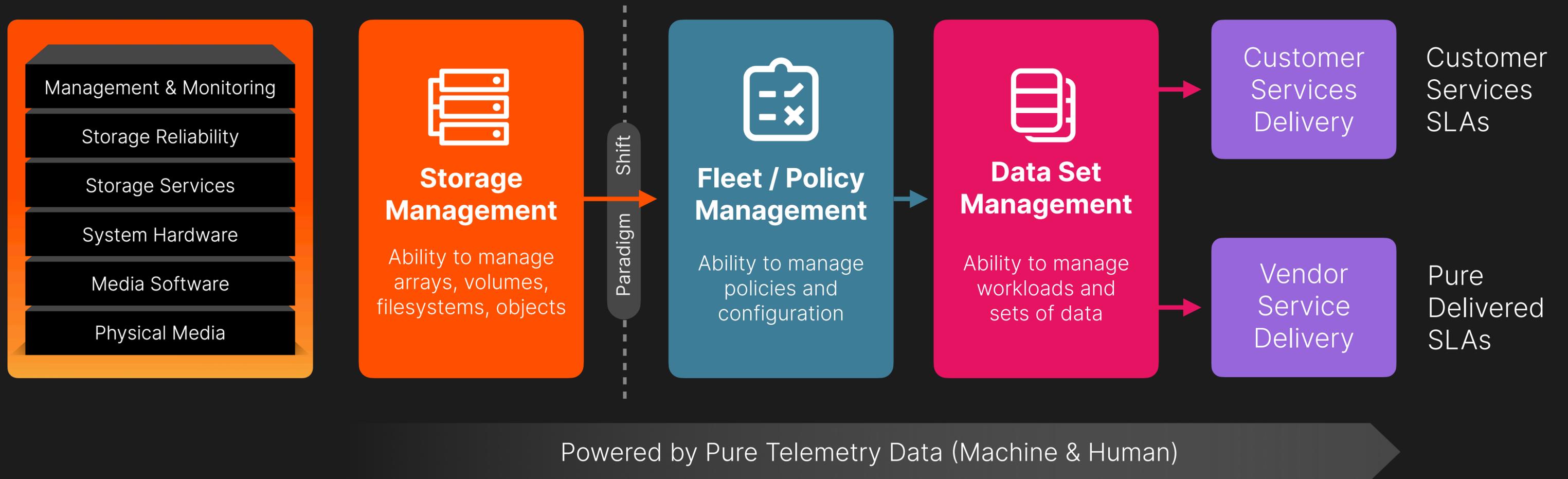
Streamline customer  
operating environments



## **Provide Instantaneous Value**

at the speed of business need

# Maturity Model to SLAs Driven By Fusion



# Evergreen//One as Vendor Managed SLAs

Whatever  
Storage  
You Need

Block

File

Object

Deployed  
Wherever  
You Need It

On-premises

Cloud

Co-Lo

32 Available  
Countries

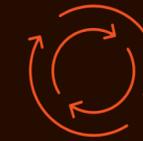
Based on SLAs & Guarantees



Performance



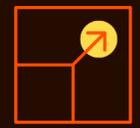
Uptime



Zero  
Data Loss



Buffer  
Capacity



Site  
Relocation



Zero  
Planned  
Downtime



No Data  
Migration



Energy  
Efficiency



Cyber  
Recovery



Resilience

Paid Power & Rack Commitment

# Evergreen//One Built on Pure's Uniqueness

ENTERPRISE APPS

SAP

ORACLE

SQL

CUSTOM

MODERN APPS

SaaS

ML / AI

vmware®

SUPPORTING ALL WORKLOADS



DELIVERED AS A SERVICE



INTELLIGENT CONTROL PLANE



VIRTUALIZED CLOUD OF STORAGE



BUILT ON AN EVERGREEN ARCHITECTURE

ON-PREMISES

CLOUD

HOSTED

## Intelligent Control Plane

Pure's observability over the last decade gives us the the data foundation of telemetry (both human and machine) to optimize customer operating environments

## Evergreen Architecture

Always current, always upgradeable Hardware

# A Paradigm Shift

Managing 100s of Storage Systems, Like One

## INTELLIGENT CONTROL PLANE



Distributed access for simplified resource Discovery, provisioning, management



### Federate

Organize your cloud resources into a virtualized of storage



### Remote Storage Management

Execute CLI & API commands remotely between systems



### Maximize Utilization

Non-disruptively move workloads to balance capacity and performance



### Dynamic Rebalancing

Recommendations on how to rebalance the platform for optimum performance

# Intelligent Policy-Driven Management and Automation

One API Across all Clouds to Intelligently Manage Workloads and Datasets



INTELLIGENT CONTROL PLANE



## Fleet and Dataset Management



Fleet Management



AZ / Region Multi-Tenancy Management



Policy-Driven Workload Deployment



Compliance Reporting and Remediation



Self Service Deployment



Intelligent Recommendation Engine



Workload Mobility



Performance / Capacity Rebalance

## Intelligent Deployment and Automation

# Evergreen//One

Delivers Vendor Managed Storage SLAs to Simplify Storage Operations



# Evergreen//One vs. Other 'On-Demand' Mod

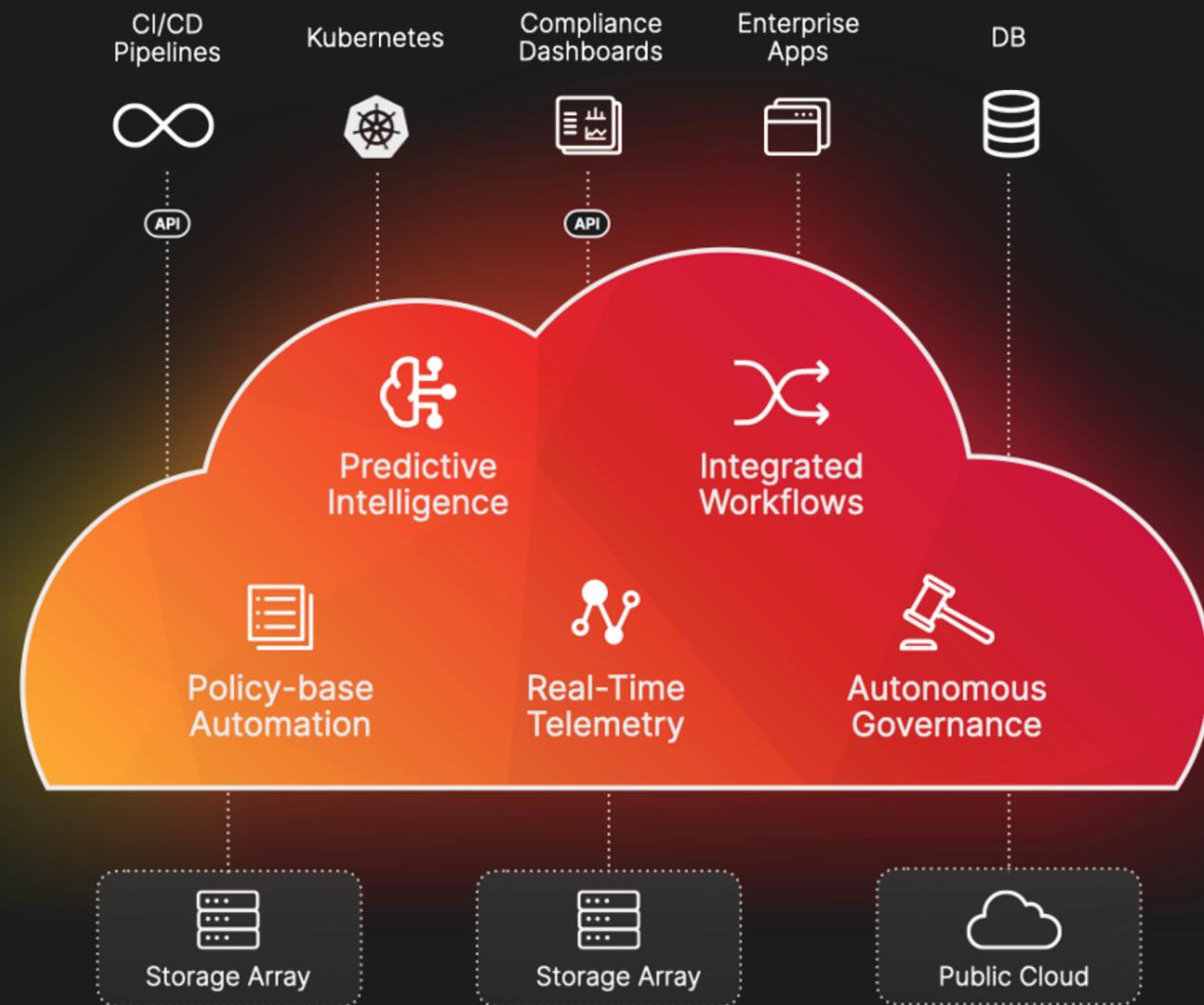
	 Evergreen//One™	Other 'capacity on demand' models
Always improving Architecture	 Evergreen	 Potential data migration at renewal
Service definition	 Subscription service by site	 "Box-on" subscription or lease
Simple contract	 3 pages	 100s of pages
Transparent SLAs & guarantees for performance, capacity, efficiency, & resiliency	 Transparent SLAs	 Weak service level objectives
Guaranteed efficient space, power, & cooling	 Paid power and rack commitment	 N/A

Customers Increasingly  
Prefer Evergreen//One

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**1000+**  
CUSTOMERS

# Enterprise Data Cloud Creates a Network Effect and Drives Expansion



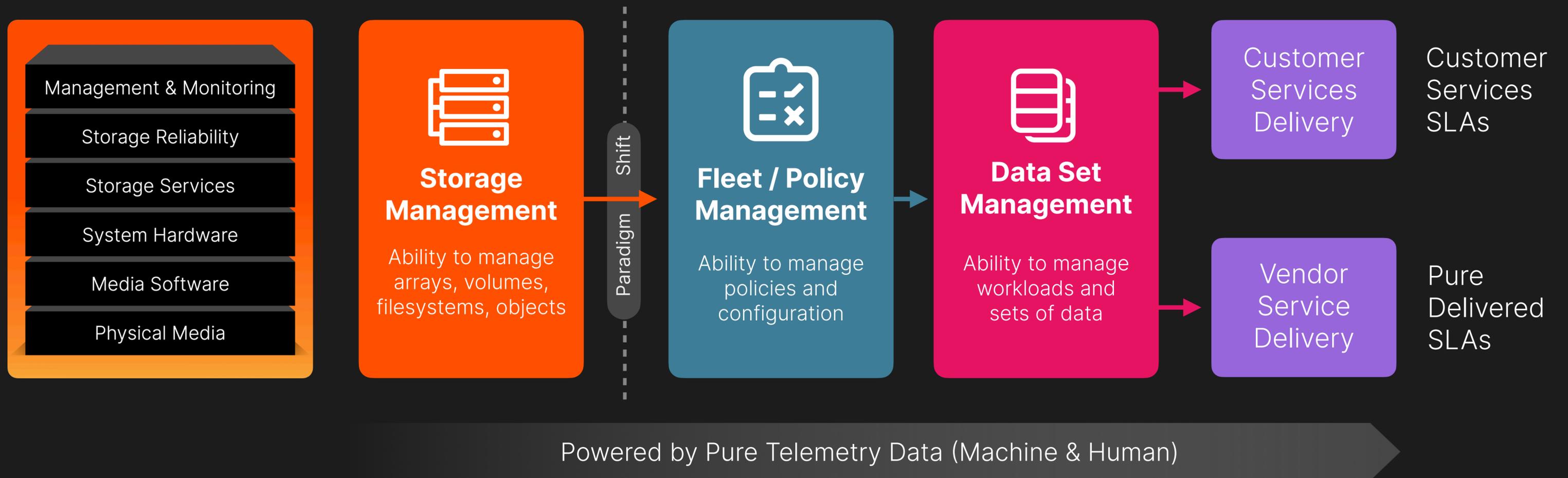
Unified Data Plane

Intelligent Control Plane

Simple self-service, scalable consumption model

Supports all workloads & workflows

# Maturity Model to SLAs Driven By Fusion





# Pure's Hyperscaler Business

**Bill Cerreta**

General Manager, Hyperscale

# Pure Differentiators



## Technical Advantage

- Highest capacity, density, and power efficiency
- Flexible software-driven solution
- Single solution for multiple NAND vendors
- Systems know-how, expert at co-development
- Highest reliability



## Supply Chain Advantage

- Strategic supply relationships with 3 vendors



## Structural Advantage

- NAND costs falling twice as fast as HDD
- HDDs hitting performance wall
- Flash fundamentally more power efficient and reliable
- Structural cost advantage

# Built for the Cloud

 DirectFlash™



Our software plus DirectFlash® Module solution has been released to production

It offers unique value to hyperscalers for their entire cloud environment, not just for specific projects.

This is not a standard enterprise product, it has been tailor made for hyperscalers.

# Market Conditions Creating Tailwinds

## Industry Analyst's View

...AI-driven data explosion causes structural changes in data center storage. HDD shortage accelerates QLC SSD demand, especially high-capacity products.

Supply Chain Bottleneck: ...conservative capacity expansion leads to extended lead times, failing to meet cloud service providers' rapid deployment needs.

...unresolved HDD issues will lead to explosive growth in QLC SSD demand.

TrendForce Bulletin, Sept. 12 & 18, 2025

## Pure Observations

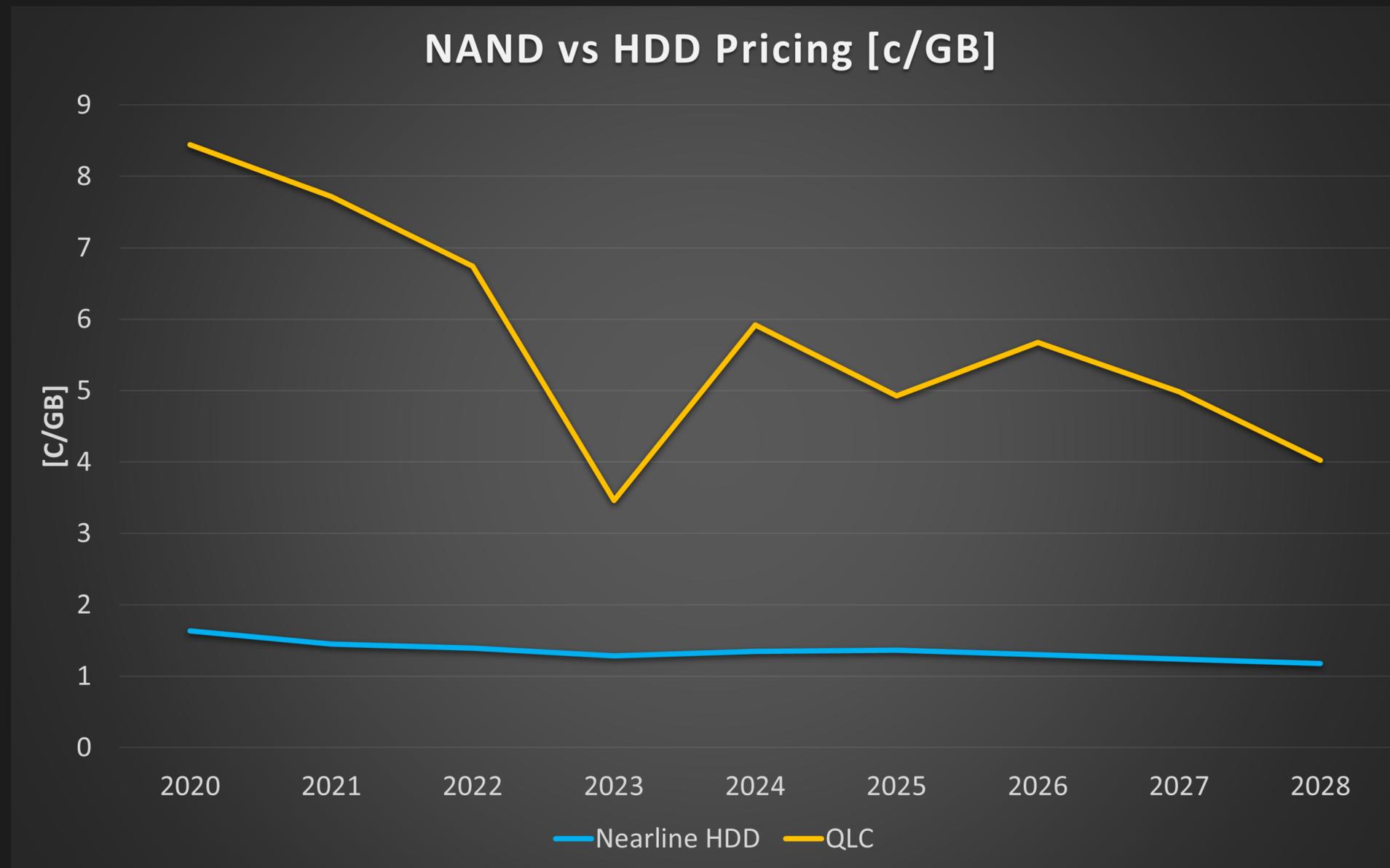
**HDD vendors** made **limited capacity investments**. Build-to-order, multi-year supply agreements, **extended lead times**

**AI surge driving a significant shortage of HDDs**. Hyperscalers are aggressively pursuing flash solutions – especially QLC

NAND vendors are evaluating further **capacity expansion in response**

Hyperscalers see these issues and are looking for new storage solutions to meet their demand.

# NAND Price Declines Twice as Fast as HDDs



Sources: Averages of Forward Insights, TrendFocus, TechInsights 2Q 2025 market reports

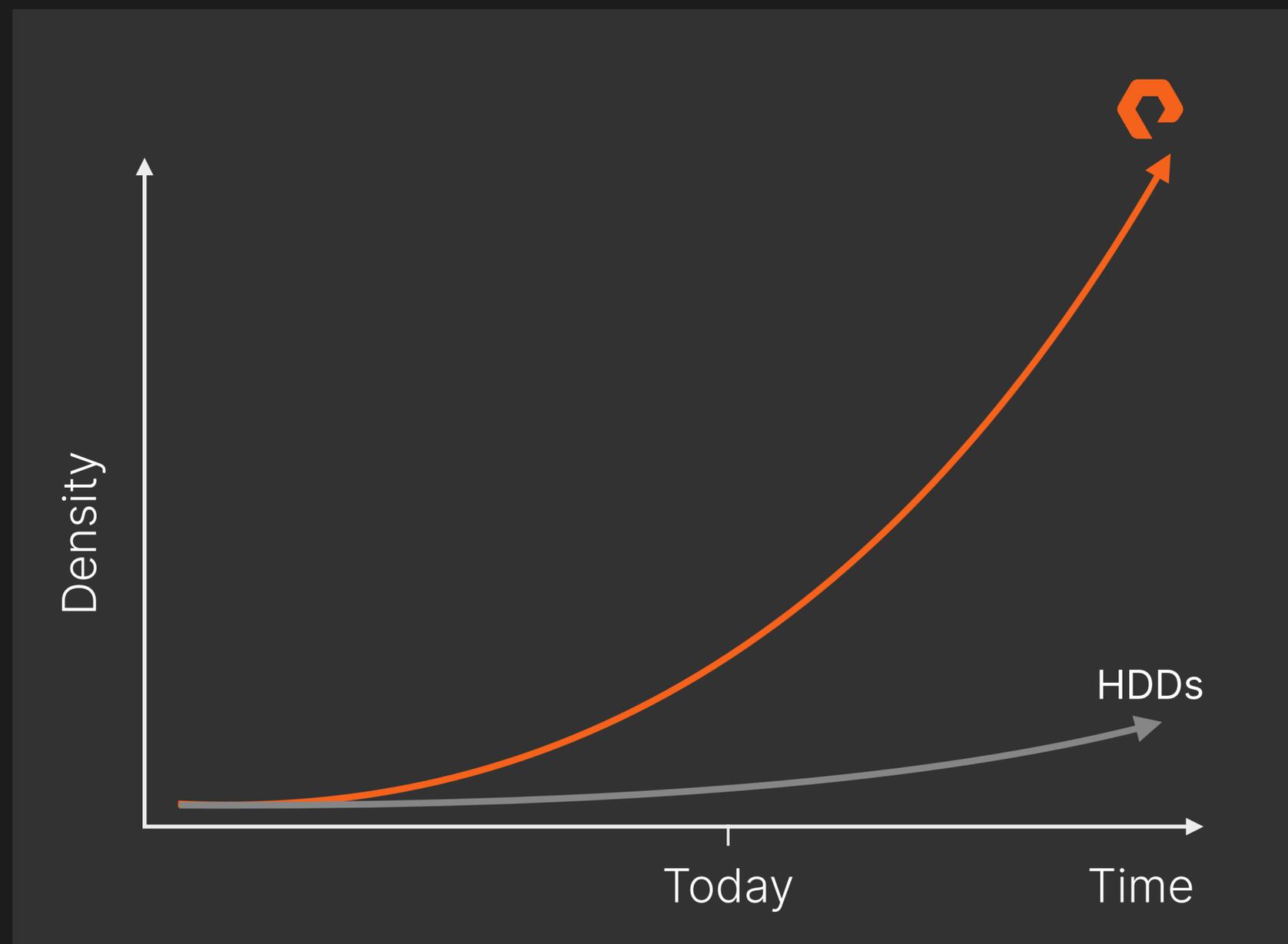
# Enabling Hyperscale HDD Replacement

Flash for warm and cold hyperscale workloads has arrived

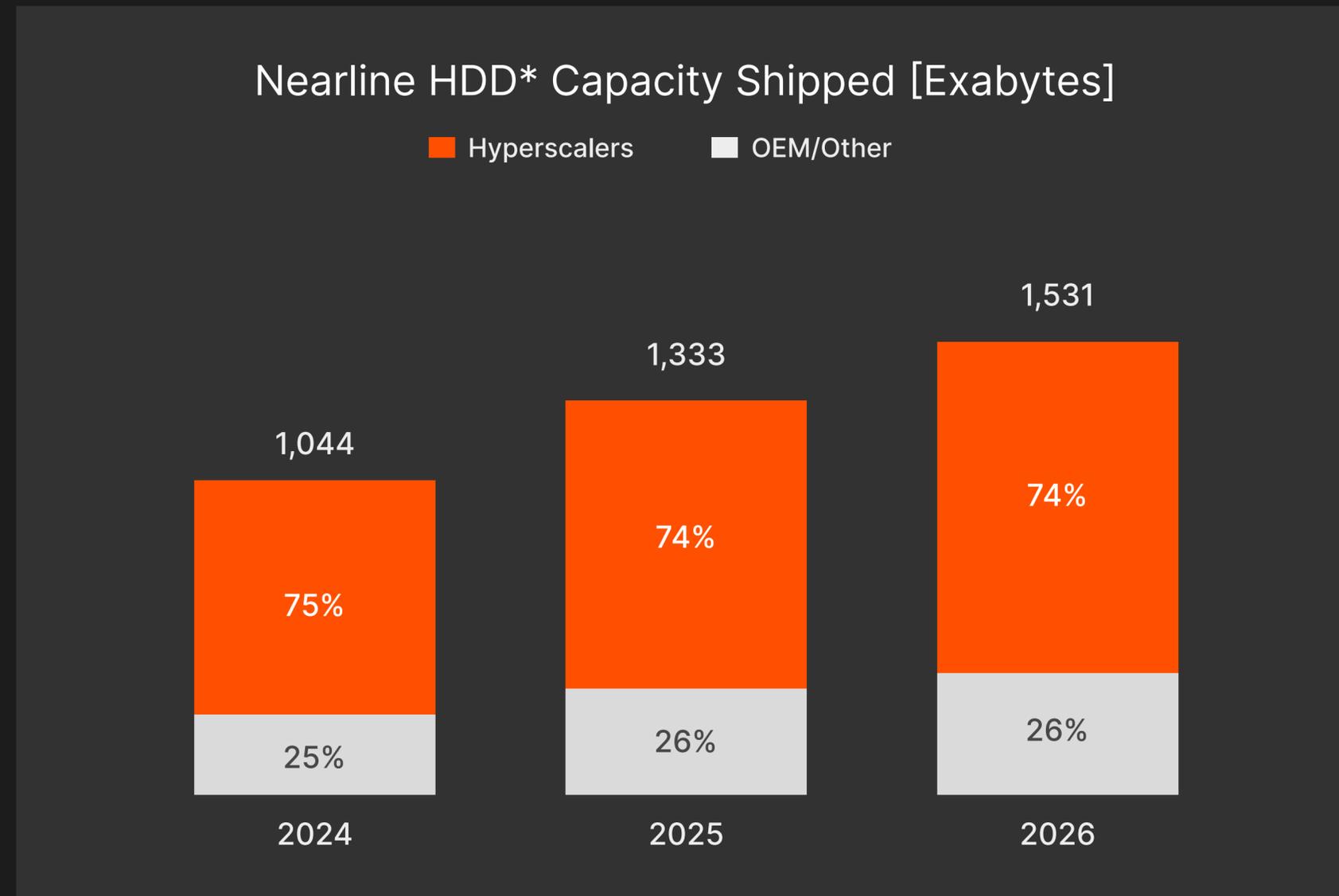
- > 10X more density\*
- > 5X less space\*
- > 5X less power\*
- > 40X better reliability\*
- > 2x the longevity\*
- 85% lower operating costs\*

\*Assumes no data reduction, which is used in our enterprise comparisons

## DirectFlash® Module Scaling



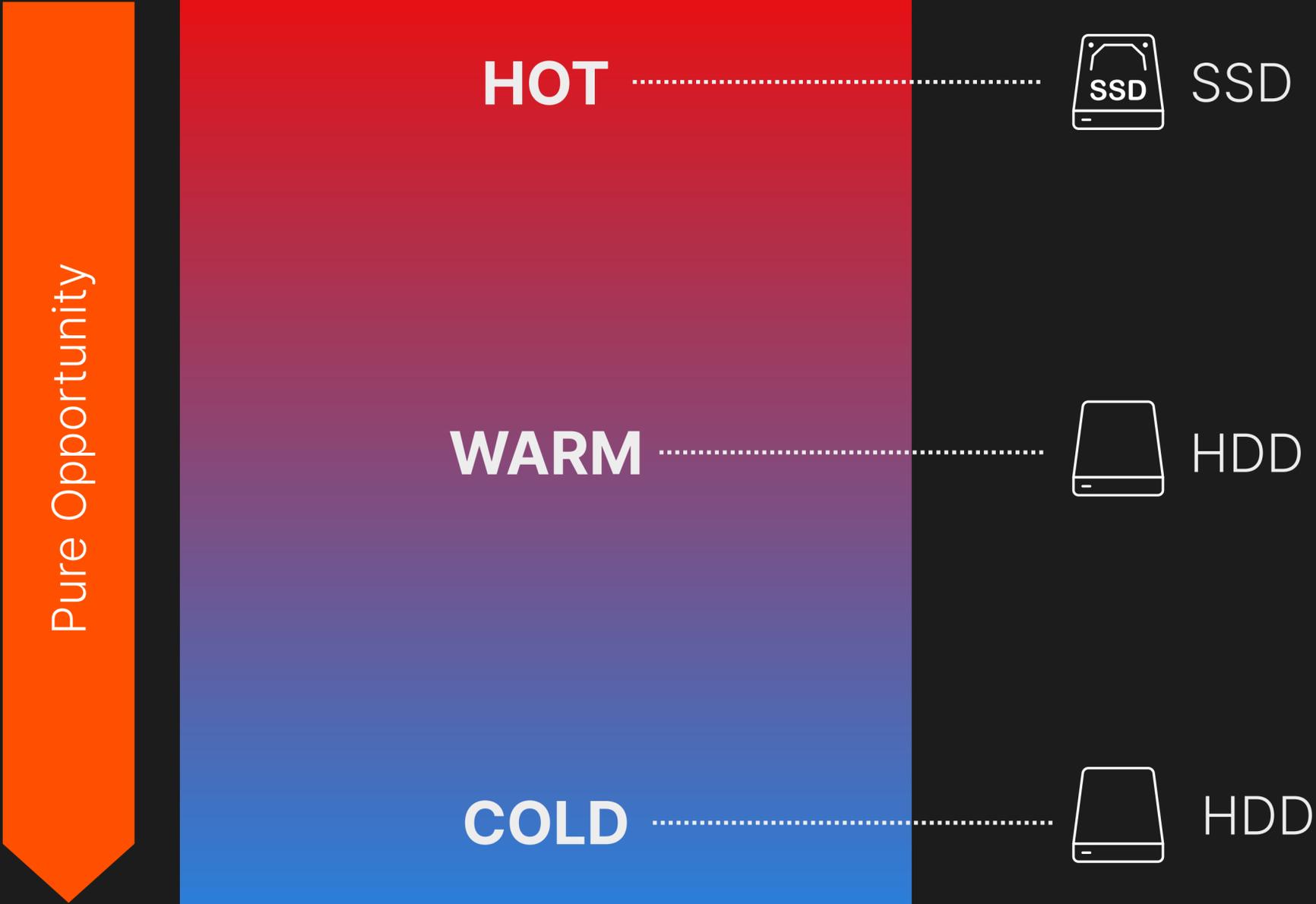
# Hyperscalers Buy Most of the Hard Drives



\* Nearline Hard disk drives (>98% of HDD capacity shipped)

Source: TrendFocus CHES CQ4-24 Quarterly Update - Long Term Forecast

# Hyperscale Storage Infrastructure Tiers



# Technical Advantages Over SSDs

 DirectFlash™



- SSD architecture limits capacity, while Pure scales efficiently beyond 300TB
- Greater density drives power and cost efficiency
- Structural cost advantage – DirectFlash® exposes more capacity
- Multiple NAND vendors under single consistent solution increases supply
- Systems expertise valuable to customers facing rapidly evolving needs
- Simplified architecture significantly increases reliability

**Software-based solution delivers optimal flexibility and agility**

# Pure Differentiators



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# Strategic NAND Suppliers

**KIOXIA**

**15.0%**

**micron**

**13.4%**

  
**SK hynix**

**20.4%**

NAND  
Market  
Share\*

\* CQ2 2025 NAND Market Share, Trend Focus Sep 2025

# With Pure, a Hyperscale Customer Will be Able to Access ...

KIOXIA

micron®

 SK hynix

49%

of the global NAND Flash capacity

Only offering in the world that has  
this much supply in one solution.



# Q&A Session

## **Charles Giancarlo**

Chairman & Chief Executive Officer

## **John “Coz” Colgrove**

Founder & Chief Visionary Officer

## **Rob Lee**

Chief Technology Officer

## **Tarek Robbiati**

Chief Financial Officer

## **Prakash Darji**

General Manager, Digital Experience

## **Bill Cerreta**

General Manager, Hyperscale

## **Paul Ziots**

Vice President, Investor Relations

