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Arista Analyst Newsletter, Vol. 02 | Q4 2015

[Products](#) | [Solutions](#) | [Events](#) | [Blogs](#) | [News](#)

Reflections on 2015 Cloud Networking

CEO Update: Jayshree's Blog

Our customers and their IT teams are under pressure to respond to new cloud-based applications more quickly than ever. The daily drumbeat for new technology adoption is in conflict with the ongoing goals of accountability for risk and operational cost reduction. A balanced and thoughtful architecture is essential. This is a top priority, particularly at the CIO and board level, as IT is no longer viewed as a cost center, but as a productivity center.

Read more here.

Arista Extends CloudVision for Secure Cloud Networking

Arista Networks announced a new capability for CloudVision®, Macro-Segmentation Services (MSS™), that allows next-generation firewalls and Application Delivery Controllers to be enabled automatically for specific workloads and workflows across any network topology. This includes Layer-2, Layer-3 and overlay network virtualization frameworks.

Read more here.

Arista Delivers Cloud Connect Solutions Across Data Centers

Arista Networks announced optimized interconnect solutions for public and private cloud data centers. With these new solutions, Arista is leveraging the technology and operational advantages of Arista's EOS and CloudVision™ for inter-data center solutions that reduce both capital and operational costs. **Read more here.**

Arista Announces Media and Entertainment Initiative with Industry Leaders

Arista Networks announced an advisory consortium comprised of visionary customers and partners in the broadcast, file-based theatrical/post-production and streaming media segments. Initial goals are to revolutionize the broadcast industry by enabling uncompressed signal transport and to deliver simplified and agile infrastructure with Ethernet economics. This will be accomplished through Arista's support of industry standards organizations, as well as collaboration between customers and partners.

Read more here.

Arista Wins EY US Entrepreneur of the Year Award

Arista Reaches for the Clouds

Arista's Andy Bechtolsheim and Jayshree Ullal were named overall national winners of the 2015 EY Entrepreneur of the Year® US Award in Palm Springs, CA on November 14th, at the EY US Strategic Growth Forum®. Forbes covers Andy and Jayshree's tale of success. **Read about it here.**

Arista Financial News

Arista Announces 2015 Q3 Results

Arista Networks, Inc. (NYSE: ANET) announced financial results for its third quarter ending September 30, 2015.

Third Quarter Financial Highlights

- Revenue of \$217.5 million, an increase of 40% compared to the third quarter of 2014, and an increase of 11% from the second quarter of 2015.
- Non-GAAP gross margin of 65.5%, compared to non-GAAP gross margin of 65.2% in the third quarter of 2014 and 65.8% in the second quarter of 2015.
- GAAP gross margin of 65.2%, compared to GAAP gross margin of 64.9% in the third quarter of 2014 and 65.4% in the second quarter of 2015.
- Non-GAAP net income of \$42.4 million, or \$0.59 per diluted share, compared to non-GAAP net income of \$28.1 million, or \$0.40 per diluted share, in the third quarter of 2014.
- GAAP net income of \$28.7 million, or \$0.39 per diluted share, compared to GAAP net income of \$21.9 million, or \$0.30 per diluted share, in the third quarter of 2014.

Read more here.

Arista's Market Share

ANET Comparables

Featured Videos

Media and Entertainment

Cloud Interconnect Solution

EY Entrepreneur of the Year Award

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