ASI Technology Summit Q3 2021
Samsung Solid State Drives – Winning Product Strategy: Today, Tomorrow and Next Year

0:03

Right, Good afternoon everybody, this is Kent Tibbils with ASI. I want to welcome you all to day four of the ASI Technology Summit.

0:11

Today we have a Samsung joining us and we actually have a whole crew from Samsung, including Nick, who's on camera and you guys have probably seen, seen us chatting and having some good time on that.

0:25

On a camera here before we got started might be wondering why do you just see things?

0:29

And you can't hear what's going on, but this is Nick and Nick has with them Tim and Rubin and Chen and a whole crew from, uh, from Samsung. They help us go through the presentation today.

0:40

Before we do that, I do have a couple of things I want to announce.

0:44

Of course, we have prizes that I don't want to announce the winners for that we didn't have a chance to do yesterday, so I've actually got two groups surprises to announce the winners that we have from the micron session that was on Tuesday. And we have from the supermicro session that was yesterday.

0:59

So, first, starting with Micron, we were giving away to Power Beat Pros.

1:07

We also are going to go ahead and give away 5 50 dollars gift cards from Tuesday.

1:12

So, let me go ahead with a 50 dollars gift card winners we have William Richman, Todd Griggs, they do Dawn Young and Kevin Jemal, so you're our $50 gift card winners. Congratulations, I'll be e-mailing you guys after this session to get connected, make arrangements for how to get that card. For the Power BI Pro, we have, from up in Canada, we have Cindy Cow.

1:41

And, down here in the US, we have Eric

1:47

So, if I got your name wrong, Ericka, I apologize for that. But congratulations to both of you.

1:53

Not bar Supermicro Supermicro, we gave away a Nintendo Switch, but we're also doing some $50 gift cards to let me start with the winners of the $50 gift.

2:05

We have here's Shod Ali, Rajiv Coil, Scott, Harvard, and Eli and James Lynch. So congratulations to you. five, and then four.

2:20

The power for the Nintendo.

2:25

I actually didn't write down the Nintendo winners name. So I'm going to go look that up again. Forgive me for not doing that. I had so many people's names you write down.

2:33

I missed that one, but I'll go ahead and write that down, and we'll get that announced to you guys.

2:38

So my mistake today for today's session, at the end, we have Samsung. They're going to be giving away a 32 inch display. Oh, we've got that to give away as well.

2:50

So without further ado, I know what we're really here to hear today is the presentation from Nick, so we want to get that started as soon as we can. Before we do, Nick and I were talking at the beginning, Nick would really like this presentation to be very interactive.

3:07

So I want to encourage you all to send in your questions, so type your questions into the question box.

3:13

And we'll be sure to get those asked of Nick as he goes through his presentation.

3:18

Like I've said, he's got a whole team of people here all under the name of Nick, who are here to help him go through the presentation and answer questions. So we got a full team from Samsung here to help us out with the presentation and make sure you guys get your questions asked and answered.

3:37

So, without further ado, I'm just going to turn everything over to Nick and take it away.

3:44

Thank you, thank you. Can't thank you. ASI for the opportunity here today to to be here and talk with, with our Swiss not like he said the team of Samsung. We're happy to be here and thank you all for your time, for your dedication and loyalty to the business and supporting ASI and Samsung on SSD and so, yes, what, what we want to do today is we do have an hour allotted. I have a few slides for us to to go through, Look at, talk about it. Will not take an hour to go through all of that, I mean, I'm sure we could talk for an hour or chat, but it would, like, he mentioned, I do like to keep the entire team likes to keep these fluid? Feel free. I don't want to, and we don't have to wait till the end for questions, as we talk, ask questions, put them in the chat. What we'll do here is, as as mentioned, there are quite a number of individuals here, there's four of us from Samsung covering different aspects of the business. and we'll touch on that in a minute.

4:41

So again, just thank you for everybody I see the attendee list Keep climbing here. It's very, very impressive Thank you for taking the time away from your day to be here with us and listen so without further ado. Let's jump in and Go here to. so what?

4:57

my team and I did was we put the the channel territory map on the first slide here So we can we can look at this and talk about this for a few minutes before getting into, you know, product and industry and questions and whatnot.

5:10

We have a brand a pretty pretty much of a new structure to our Samsung SSD B2B Go to Market team. There are two individuals on this call, myself and my running mate, Chen, who ultimately, we hone the product line, we're product marketing.

5:31

And as far as roadmap, product launches, life cycle management, you know, promotions, lead, time, supply, pricing, promotions, things like that, We support of, were the backbone to the sales team, who, who works with ASI and yourselves to move the business forward? What Do you build it, when do you need it? What are some forward forecast and things like that?

5:53

So over here, down on the bottom It's, you know, product marketing is myself and Chen again, both of us are on this call today.

6:01

And then as far as managing and supporting ASI, the tier one distributor, it's a new, new team member, happy to have him on board, to Malachi. And again, these people are all, the few that I'm going to name right now are on this call, so they can come off mute and talk and introduce themselves also. So, Tim is a little bit new to Samsung, and he's, he's working very, very closely with, with Jen and the team at. ASI from inventory from what's needed, you know, product weeks of stock, what, how a, supply looking? What's forward forward? Visibility going, to be that's. That's ownership at the ASI level, then All You great resellers out there. The up top here, the region or the country We have a new team.

6:49

Many of you probably remember the names. Adam and Melissa Atom used to manage East Coast and Melissa used to manage West Coast as far as the resellers size, all the VARs and SMBs out there. Melissa is still here and owning this whole map, as you, as you can see up top here. Adam has moved, has moved to a different role. He is now supporting all of the ..., or NSP accounts, CDW use ... zones inside connection. as noted noted here. And then now, working with, and for Melissa, that, the country has been split a little bit. And we have Rubin on the line here who, many of, you probably know from the yellow states here, he manages the west Coast. And it almost looks like, OK, wow. There's a little bit of the west. And most of the disease.

7:38

Well, a lot of the business, and most of the customer, most customers are kind of in these clustered yellow, states here, So kinda even did out between Rubin and Sean Rubin's, running mate who between the two of them they are the two. Go go to individuals for supporting and owning the size you to all of you resellers out there on updating you on product line roadmap. What do you need? You know, when when is product could be available? And you know how to help you grow your business with Samsung?

8:10

So this is that this is the map here very simple, very clean. So rubins Rubin is west Sean is central and East Tim is tied to distribution.

8:23

And then Chen myself mainly is tied to kind of all of it overarching from a product standpoint. So what what does Rubin, if he's resellers yourselves. What do you need and when do you need it? And then what does Tim and ASI need? So the Kinda like the backbone of the product line, on myself, and then anything, anything I know.

8:42

There's probably a bunch of size on here and a bunch a really really techie gurus anything that goes over here, that's where I start chatting, or you could all asked Chen on board, because he speaks a different language. When it comes to technology and stuff, I could hold my own, but then he's another level, OK, And that's where we really compliment and have a great team, and package around, to support the the Business in Totality. Tim? Rubin Chen. You all know, if you don't put a muzzle on me. If you don't just stick yourselves in there, I'll just keep going. So whenever you want, just feel free to jump on it, but we're told me to pause for a second.

9:16

So, that's the, that's the channel territory map that's that's how we're managing from a reseller and and and Samsung SSD Sales as far as well as product, marketing management. How we manage it all.

9:31

So, now we can actually, we can. we can move to and touch on and sit here for a minute. And look at what most of you probably are, all probably are already well aware of. And it's the product portfolio.

9:42

It has evolved. And it has changed. And even quite a bit, I mean, a little background. I've only been with the company for about a year and a half. I started in the beginning part of 2020. And this this product line, this roadmap here looked, a little looked different.

9:57

There, used to be what probably many of you are probably might be looking at is they used to be DCT models on your data center drives models that kinda, was a bridge between our client, sadder, NVME models, and pure, true OEM. It's closer to OEM, enterprise level drives. More expensive, longer lead times. Built and designed to run july 24th seven to be able to handle the rigorous workload of basically never being turned off. If the system is gonna run round the clock, whether it's going to be doing server, data, center backup. Backing up companies, IT in a back room with all these you know, air conditioning and cooling systems in there, just run.

10:42

Run, run to backup data or whether you know hospitals are using it for, for computations of different medical reasons. Universities now are using it. And, there's actually careers coming out of universities for, for data computing and mathematical computations that just run algorithms, that do, you know, if, if an, or when kind of things.

11:06

So, in a nutshell, products that we're going to run, if your system is going to run july 24th seven are DCT models were the ones needed. Now, they're not on here because we've just finished yelling and moving through the last round of our DCT models. But we will we are planning to have and relaunch new or replacement DCT models in the early part of 2022, sooner, the better for all of us we hope. But stay tuned for all of that. The entire collective team

will revise and update, if not, if, when, just got the if is it, what models. There'll be no form factor capacities, things like that when they launch.

11:47

So, what we're left with here in front of us to sell today that's that, that's the future.

11:52

So, we're left with sada, NVME, and portable.

11:57

We try to bucket the, the, the product line. We typically bucket it in four.

12:02

With the JCT being the fourth battle, that'll get inserted back in next year.

12:07

So, on our Sada lineup, that's the that's the unit volume for sure, still is even though Santa is shrinking a little bit quarter over quarter and NVME is growing and taking over pulling Somebody share and more of the business.

12:22

Especially with the big type builds in size, you definitely want NVME at at minimally 3500 megabytes, a second on the gen three but sad, it's still incredibly massive out there for a unit volume perspective and within our saddle lineup we you'll see here we typically have 3 to 4 series per models per series.

12:45

So, in this data, we have 8 72 vote, we have 870 to evolve, and then we have have, I'll explain the coloring system here, 860 Pro as an 860 Evo is an M dot to form factor.

12:58

So we're still one of the only ones who, who have, not, for much, probably, not for too much longer, which is, which is, again, why these are colored red right now, and what we'll touch on. Forward looking visibility to some of these, but usually good, better, best to vote evil probe.

13:16

And the reason for that is Q will see TLC and MLC the type of NAND being used to build these different, these different models series.

13:24

All great quality product or great quality Nhan ships, just really more of a matter of longevity.

13:32

And we'll, we'll touch on that a little bit more, in some, in a slide coming up, but let's just stay here for a few minutes. So in the saddle lineup we we have four currently have four models or series. And again the Evo in this M dot two, it's an M dot to form factor. It's not 2.5 inch were one of the only ones that still has a Santa ... to form factor in a SATA interface, which makes us very viable. And we do a lot but we do we do pretty very good business with the ASI and all of you resellers out there. So thank you for that it The longevity the life cycle of that is is probably coming to an end That's why I'm a color coding these red as a little bit of an alert that don't. Let's not plan on these four models that will. We'll touch on the other ones, too. As we discuss this slide deep into 2022, we weren't sure if it was going to be. If these were going to continue into the first half of 2002.

14:27

Now it's looking like these will probably these will live this year, but highly unlikely to go into 2022, So that's why perfect timing, We just found out about this recently, to have this call and this this opportunity with all of you to share some of this information, so any any opportunities, any, any any builds, or forecast that you would want or need this year there, here we are already ending September, so you really only have Q four. Gosh, it's really that far into the, you're already here. I am thinking like, well, maybe just entering the second half time is just flying these days. Please look at what you would probably what you would potentially need some of these models for. And then roll it back up to your to your contact at ASI.

15:13

Let Rubin know or you know Shawn, if you're if you're east coast and worked with us, we'll help you will help you help you through as best we can with the probably with the limited amount of supply. We will have over the course of Q four.

15:27

So, but ..., do we typically like to have, like I said 3, 3, 3 models? Or series of good, better best Kubo evil pro heading and it was the QT and the M for the type of what that really does is the that keeps the queue will see NAND is the least expensive. So it keeps costs down and allows us to sell to ASI and allows A, is either sell to you at a very attractive price point.

15:54

Know, we all have budgets, and I'm sure, you know, you have budgets. Your end users have budgets, so that allowed us, by launching this kubo in 20 20, we launched that last year.

16:05

I was very proud to launch that at with an eight terabyte capacity. We did that to have something, you know, great quality, good, really viable read rights basically at parity rewrites and login, and we'll talk about that in a few minutes to the evil.

16:19

But keep costs down. Keep costs down, and also try to get up high capacity product.

16:25

And we accomplished it. We have it, we have the only eight terabyte, 2.5 inch data out there in the marketplace, so, a terabyte everybody, people don't want to force. A lot of times they want 1, 8, and we've been doing a lot, a lot of good business with that, with all of you and ASI soap.

16:42

Let's keep it up and keep that role, so thank you for that. So, you have Kubo and we just, we, we all know that 870 Evo just launched this year 20 21. And we just started getting, you know, good supply a few months back. And yes, now the supply isn't incredibly healthy at the moment. We had a Q three kinda initiative or drive to really push than demand or supply or production to the ever growing NVME segment hearing from most size out there. That's what's needed And wanted, anyway. More desired is the NVME. So you gotta remember to Samsung.

17:24

We, our team here, or as part of the branded team, and then the result. Then there's a separate division, which is the OEM with the enterprise team. And all of our name comes really from one kind of bucket. And when and if one division is just skyrocketing and taking, taking off which our OEM division, happy to say, very proud to say they are doing the demand out there from those big humongous tier one. Conglomerates and brands, you know, are growing.

They, they get a little preferential treatment when it comes to NAND allocation. So then when we have to make decisions, we say, OK, We have X number, X, X chips of NAND. We're gonna, we're gonna focus on where the market is growing and where the new the new more strategic builds and customers need which is Most of the time NVME ever seen that continue to really grow at a certain point. Next year is going to be because there's going to be a crossing point where, you know, where, where does NVME actually crossover and and actually exceed.

18:25

And take over the market overshadow that. that remains to be seen, but, but it's, it's coming.

18:31

So, back to Zeta.

18:33

So, Q boniva, we have, and these M dot two, and the pros we do.

18:37

But, again, keep an eye out for, and, look. Look very detailed fashion at your business, and your opportunities that are upcoming for the ..., and the pro to supply will be limited in Q four. And then, we do not know yet what is going to happen in Q 1 to 22.

18:53

I, my gut reaction might my feel, is by the end of this year, these these are gone. These will not enter 2022, so just wanted to color code these and give a heads up, like I said, so, that Santa NVME.

19:08

Now, that's probably very near and dear to all of you and all of us right now. We have this, looks quite a bit different than it did last year in 20 20 and last year. They are inducted early, mid part of last year. The 980 Pro did not exist. The 980 only launched this year, so that didn't exist. And there was a 970 evo in here. So this 970 Pro, similar to these over here, will, also be exiting the portfolio, because, mainly the 860 Pro and the 970 probe, because the MLC MLC is just getting more and more challenging and difficult to, to, to procure, to build. So, we're going to be focusing very heavily and more heavily on TLC, which we can get and build very, very freely and have good volume and support.

19:57

So, the NVME lineup will be 980, 970 evil plus and the 980 pro, OK. two of them these these these two series here are Gen three NVME. So, your standard 3500 megabytes a second Friday finding Any newcomers out there. Any any customers who maybe aren't entrenched in in this in the SSD world and specifications. Sat up is roughly 560 megabytes a second CAHPS out. It can't get more than 600 megabytes a second So that's really what that's the difference between sat and NVME. You're you're stepping six X, the speed and performance by going through Saturday NVME. Again, you probably all know that, but if there's any one person out there that didn't, that now you now you know.

20:42

So there's 600 megabytes a second cap you hit a ceiling And then NVME is 3500 megabytes a second cap stealing for gen three. OK, so that's these these two here. So we are 980 probes and it was long anticipated to get this. It's a gen X gen four.

21:01

What that Gen four allows and enables is up to 7000 megabytes a second. It doubles the gen three speed and essentially gets 12 times the speed of sad. Because if you have 600, then you got 3500.

21:15

And this guy, 7000, it's double that it's, it's almost 12 X zeta. So our nine AD probe, which we're very we're very healthy, were very healthy by the way, on all NVME series right now the 980 definitely the 170 evil plus 1 and 2 have been breadwinners for all of us for a long, long time. Keep that common. Bring your opportunities into ASI to rubin to team, to all of us. We have a lot of what a lot of product to support As we go into Q four and even into next year. And the 980 probe. Thank you for your patience. Everybody By the NVME was a bit challenged for awhile.

21:52

The evil plus and the 980 Pro, we were a little hand to mouth. We were trying to get the, the production in ramping going, because we use our team, we support both B2B and B2C as far as our R NAND and our production with the factory and headquarters.

22:08

It is now flowing. It is now flowing healthy upsides, you know, what do you need? Let's get it in the system and and plan for it so that you could secure the, the, the product for your builds and for your customers. So, 980 Pro, is 7000 megabytes a second because of Gen four. But, again, most of you are probably aware of this, but if there's even one person who's not.

22:29

You have to plug that nine AB Pro into a gen for mother board.

22:34

If you will appreciate and experience the 7000 megabytes a second, it is absolutely backwards compatible to a gen three motherboard. But if you plug a gen four product into a gen three motherboard, it will a bottlenecks at the compatible at the specification of the the the the motherboard of what you're plugging it into. So they've got to be common denominators. They both need to be gen four to reach for R 1 and 2 terabyte models to hit 7000 megabytes. If you put it into a gen three motherboard, it will work beautifully.

23:05

But then it also just keep in mind if you're not seeing 7000, 6500, 5000 if it's, why is it only 3500? What's wrong? Nothing's wrong. It'll just speak to the language of that motherboard. So just very, very simply put.

23:20

So, that kinda kinda outlines quickly, our NVME portfolio, 970 prowl the exiting, and then we'll have 1, 2, 3 good, better, best. Let's let's touch on 980 for a second, because 19 eighties is brand-new even newer than the pro. So, 970 evil plus has been around for awhile a couple of years. It's still very, very strong, going all through next year is the Plan 9 80. We just launched this in March of 2021.

23:48

The goal here was very similar to the goal of the 70 kubo.

23:53

Let's come up with a down and dirty price point.

23:56

attractive no budget conch its budget conscious series that you could use for entry level NVME.

24:05

Which is why we offer it in one, in 250, 501 1 terabyte, and the plan is down the road to also launch a two terabyte. Keep that in mind, so that'll be good.

24:15

When we did this, we built this in a certain way, where we knew it was going to be a good quality, but we wanted to keep costs down, as low as we could, while still delivering a good or great performing product. There was a 970 evo.

24:32

In place there, prior to the 90, just dropped the word Plus, and there was a night 70 evo, and then a plus. So we knew that this 9 8 he was going to come in much better priced than the Evo.

24:44

And that there was going to be a performance gap as a result of how we were building it. How we were engineering it and with the with the software with the firmware and the controller and all that kind of stuff. But that was, we went into it, eyes wide open, knowing it. OK, don't be a performance gap, but it's doing what we need to do is just it's an entry level product. So when someone just simply has to plugin something that's NVME, but here's my budget and I can't afford the evil plus I got something that not even the evo, what do you have while we offer this?

25:14

Happy to say when all was said and done. And the dust settled and when we got this product from our engineers, our factory and when we launched it, the reviews were great because the cost did exactly what we wanted to do, keep, stay down as low as it could be.

25:28

But the Performance, the gap that we were originally were initially anticipated between the 980 here and the 970 Evo here that was we thought, OK, maybe it would be X It ended up being only, it would only a portion of X, It almost came out the final product almost at parity to what to the 970 evil that it replaced. So, we were really thrilled and happy with that.

25:54

So, and that's why we see this is doing really, really well, all three capacities because, because of that reason, entry level price point.

26:01

Actual product, so many use applications for it out there and Product is in, It's, it's, it's our in our barn.

26:08

It's in a size warehouse and just does whatever you need, just, Let's, uh, let's, let's keep those conversations going.

26:15

That kinda rounds out NVME portable.

26:19

So we have a line of portable SSDS. There was a fourth one, here, last year, in prior years, called an X five, Thunderbolt connectivity. Just for anyone who remembers that are sought, they're no longer part of our B2B lineup on, it just didn't do, it, was just the speed, the Performance. The price, It just didn't perform, didn't, do well well, there was no real need for that in the B2B world.

26:43

So, we're, we narrowed it down to these three, which will very soon be narrowed down to just those two The T sevens. So T five has been around for a long time. Great product. The volume was, was through the roof, especially on the B2C side. But, even on our B2B side, do pretty well on that. It's approximately 540 megabytes a second on that T five, utilizing USB 3.1, Connectivity to laptops or devices, are more mobile portable devices.

27:15

We launched the T sevens in 20 20, almost doubling the speed of that T five.

27:20

So, they're 10 50 megabytes a second, and there's two of them, because one of them is just simple, simplistic little plug, and play. Device.

27:29

The T seven has, you know, what, Now, that I'm getting into some granularity is taken away, let me just quickly jump down to, I said sit here for a second. This gives you some of the specification, and some of the things I'm remembering and talking about. So now you can see the wildlife while I speak to them, Should have apologize. You should have done that over here.

27:47

This was the, this is, this is the detailed slide for all of the solder products, Q volt Evo, and then the two that are kind of exiting.

27:56

And this was the NVME showing the 7000 megabytes, a second for the Gen 3 and 9 a pro at the Gen four with the speed of 7000 megabytes a second again when plunked into a compatible gen four motherboard. So here down here at the portable. So it'll be just those two moving forward, G 727 touch.

28:17

The only difference between those two is the Word Touch.

28:21

So it's this little backlit, LED, blue square, Bud, it's like a smartphone touch buttons, not a fully depressed, manual, depressing type of button. That's that's fingerprint recognition. So, really, really cool for, for some high-end encryption and security. If, you know, there might be, you know, law firms or doctor's offices who need and want to use this kind of moving around on the go. And, if they leave it, leave it down somewhere, and they forget it, somebody else can't walk over quickly, connect, Grab that, are bringing connected, and access the data on the inside.

28:57

And the great thing about that is that fingerprint that button. That's this is programmed to recognize up to four fingerprints, different fingerprints.

29:07

So, for team members, for family members, whatever the case might be can share and utilize that product.

29:16

So, again, the differences 540 was great, but 10 50 is much better. So, and these are already these had picked up tremendously over the past, I'd say, 3 to 9 months here.

Volume is certainly here, because not everyone needs or wants that a fingerprint recognition feature. And with that, of course, comes additional dollars, right? So, the cost of your prices is more mm Excuse me, one second.

29:52

Reminds me of comedians when you watch a month onstage and then they take they take a pause it tastes at the water and they come back OK.

29:59

So, that's that's our portable lineup there so the it'll be it'll be the T sevens moving moving forward T five will live through the through Q four similar to those other ones and Highly likely to not live in carry over into Q 1, 2020.

30:17

Alright. Let's go back up here for a second. Now that we've touched on all of that. So we touched on that, we touched on the portfolio, are the up It's 30 minutes. And like I said, if I don't even sometimes consciously take a break, I'll just keep going.

30:30

Are there any questions before I touch on, I go to another kind of talking subject, or Rubin and Tim, you want it introduce yourselves, talk, say something, feel free.

30:44

So, Nick, we do have a couple of questions and, and don't worry, we'll, we'll cut you off. If it gets too close to the cubic. Yeah. Just to ask a couple of the questions that we have coming in, first one is, I saw on some of the slide, you kinda showed a differentiation for market segment where these drives might fit or best fit.

31:07

But you have some drives specifically for security surveillance and specifically for now, what will be the best drive for those two applications?

31:17

OK, so, Chen Chen is on the call. I mean, he could also chime in.

31:22

But, as far as, I mean, number one is, it comes down to first and foremost what, what type of system is Are you is, are you running? What interface does the system require? Sometimes, systems are either SATA or or NVME. So then at that point, you would, number one, you would know, OK, I gotta go SATA, where I gotta go NVME. And then it's a matter of how, what is, what software, how long are you running it? Do you, is it running kinda consistently where you may need to hit a speed or have some launch sustainability in what you're doing and a lot of times?

32:03

And I know it doesn't behoove us right now. MLC products are more models are great for doing something. It's kinda like, run, and then carry over. Maybe like like I heard surveillance or security, maybe it's, you know, depending on is it high def type of high REZ and high def security footage, then possibly something like that? But I mean, it all depends. I mean, that's that to me, it seems like a very high level question would love to have a little bit more detail around that. And then we can come back to you with some with some suggestions. I mean, really it boils down to in, in each of these you have.

32:42

Speed speeds, know kind of good member back to the good, better best. So 9, 80. Like, if you look down here, i-ops, no input, output speeds, and stuff like that.

32:52

You'll see here 980, And then the Evil plus jumps pretty significantly to 3160, and then forget about the 9 80 you, and you look at those jumps to a thousand each, so it's really a matter of price point and what kind of speed you need for that particular, whatever application it is you're running.

33:14

So, you were kind of showing some of the, the database drives and I'm a bit curious as to how long do you think this data drives, especially the ones that are the, the 2.5 inch form factor.

33:28

I know you mentioned that the ones in red there the 860 Evo and 8 60 pro are are phasing out.

33:36

That's why they're in red but how long do you think the the 870 QBO and 8 70 Evo will be in market for data.

33:45

Lot of times, a, very long time. This, this, that's what I've mentioned earlier, touched on this 2.5 inch sat at. Market is absolutely massive.

33:53

I mean, it's still the volume is still I mean it, it trumps multiple multiple times what NVME does from a unit perspective, you know, ASPs decline, obviously quarter over quarter, year after year. But let's cue of own evo. I mean these are 860 evoke that was just replaced with. Julie just ..., the 2.5 inch and launched 7960, eva was the number one best-selling SSD in the world across any, any anything. And once this, once our supply this 8 70 evil catches back, up to where we had hoped it would be, and it will be again in 20 22, possibly even Q four of this year. It'll take his place.

34:34

So 2.5 inch sada isn't going anywhere, I'll, I'll confidently say, for years.

34:42

And those, those, we just launched these, so you can, you'll, we will be seeing these two series probably into 2023.

34:51

Great. So maybe, now, it's also a good time to kinda take a look at some of the supply issues. A lot of supply issues throughout, throughout the channel on a variety of products.

35:03

So, can you kinda talk a little bit about availability for the channel specifically for the NVME 970 and the 980 products?

35:14

Yes, absolutely. and I end up and fraud and that's what I touched on that earlier. I'm happy to say supply is great on 970 evil plus and 979 AD Pro. And the 9 80 has been improving month over month and it is finally catching up to where we, we we want it and need it to be.

35:36

So, for Q four NVME is very strong and very healthy.

35:41

All three of those years.

35:43

Great. So, I know, earlier, you were kind of talking about your enterprise driver, DCT Drive, but maybe you can kinda refresh on that.

35:52

But as that, is that drive in that drive in limbo?

35:57

Or is that drive still continuing? What's the status with that one?

36:01

Sure, sure, So, DCT, right now, there is there are no DCT models. We just finished kind of us phasing out the 883 DCT, 2.5 inch data into 40 up to 3.8 terabytes to 40 gig up to 3.8 or 4 4 ish terabytes, that is the volume driver in our, in DCT. Absolutely.

36:27

The 2.5 inch sat in, in DCT it that the plan is to replace that and the the ETA is at some point in the first half of 2022.

36:43

Don't know, I don't know the model yet, whether it's going to be an 893, or completely, something different, like a 950, don't know. But, stay tuned as soon. As soon as, I had my, my product, marketing team gets information, and knows, will, relate to the, to our sales team, and it'll come right out to all of you with some updates.

37:02

Great. So let me ask a couple more questions, and then we'll go ahead and move on. But for everybody on the line, if you do have questions, go ahead and submit those in.

37:12

I'm gonna go ahead and hit hit Nick up here with a couple others, but do go ahead, keep sending in your questions.

37:19

So, would you say that drives, that we're looking at here on, on this slide, that we're talking about?

37:25

That these are consumer class drives. Or, any of these are rated for july 24th seven use, or heavier kinda applications, and maybe other drives within the stack.

37:37

Sure, sure, absolutely. That ties directly back into DCT, I mentioned earlier, when I started discussing DCT, one of the most simplistic ways to understand and when to know when to use your knee DCT. is that phrase 24 separate server rooms, data center, or any system that is just gonna run round the clock. These on the screen here are sad or NVME, and even at Our Poor Portables definitely consumer or, you know, B2B use. But just, but it's an external drive. The sat and the NVME here on this screen, these are client level, everyday use drives. They are not built or designed to handle 24 7 will sada, which is 2.5 inch. Like very similar to our 883 from an interface and form factor perspective. If you plug in an 870 evo.

38:32

two terabyte in a system that really should maybe have the 883 D C T two terabyte will this work? Yeah, of course it will. It's the same interface. It's the same for factor, and it's an SSD, But, over to Will it last, is the question highly unlikely that it will, because, again, these are just built inmates.

38:51

You need a break, simply put, run it, run the system all day, all day and night.

38:57

Turn it off, give it a break, next day, turn it back on. But, so 20, 47, these are not correct.

39:04

OK, great. So looking at the portable drive, are there any plans for that drive to have a Thunderbolt option available for external drive?

39:15

Possibly, we have something in the works for 2022. All the specific specifications and features are not yet.

39:28

Finalized, Could be, could be a Thunderbolt, or it could be something greater than the USB 3.2. But that remains to be seen, I don't have that information as we sit here today.

39:40

All right, why don't we go ahead and press forward. And again, guys, if you have questions, go ahead and type those in and and get them in.

39:48

And we'll be sure to get them asked to Nick.

39:51

So, Nick, we'll go ahead and pick back up with the presentation.

39:55

Great, OK. So, where we left off was this year. So we talked about the entire portfolio and it was situated Sada NVME and portable now, a shuffled these around a little bit. To give some focus to give some guidance and direction on how and where is our supply And what should we be kind of focusing on As we end Q three and move into Q four? So this is the, almost like the primary focus for us. When I say us, Samsung and ASI together as far as what, which series will have healthy supply, good, good campaigns initiatives behind them? and where, you know, upsides builds where your needs are could be supported very easily. Primary are these four models right here.

40:41

These series the hundred 70 kubo, the and then, all three NVME is as I mentioned on the prior slide that will be healthy in Q four or NVME which is great for all of us.

40:53

Secondary focus may be a little bit tighter supply.

40:57

That's really what this boils down to was supply based and where we should be focusing our efforts knowing that we will have availability and be able to support them to build the needs and even upsides or opportunities that come out of nowhere on, for, on forecasted.

41:12

Secondary is And I moved it 870 evo was about a month to go over to the far right because we were very, very, very tight. This is loosening up now and that's what we were hoping and hoping as we as we ended Q three and moved into Q four: that the 870 Evo, which is the main bread and butter, again, in the satisfy series, was going to free up and be much more healthier. It starting to look that way.

41:38

It's not where we it's not at the level or point where we needed to be or want it to be where it was maybe a year ago where the 860 was where any capac any quantity you need ISI has it. We have it to ship. It's going to be it's going to take us some time to rent, continue ramping, get get that back up to snuff. but 870 evoke 2.5 inch getting better. And then our portables while the, while the chief five lasts, it's healthy.

42:07

And then the 277 touch, G 77 touch, are a little tight right now, which is why I grade them out. In the middle there, They're just the demand we build, and it's the demand is very big, and, as quickly as We build it, it's gone. So, we're trying to kinda get that back up and running.

42:26

Then, over here, on the, you know, when I say low, it's very low.

42:29

These are the three models that I highlighted in red previously, because they are exited the portfolio. So, it's gonna be tighter supply, as we finished the year, and as we go into Q four, there will be some, some availability. So I really implore all of you as I mentioned earlier. Look at those models. Look at builds, or any end users, or whatever the case might have been, where you have used those in the past.

43:01

If you foresee a need to use them again, in Q four or even Q one or Q two, you know, by now, what you may, what you would possibly need in Q one or Q two, because they're not going to be here, most likely, OK.

43:18

So that's kinda gives you the 1, 2, 3, the green, most of the business, other than this one right here, which is volume, it's all right here, so it's it's a good thing OK.

43:31

So let's, let's drop down to this here, So the Kubo so while this 870 Evo is still catching up and and a little, a little tight supply wise.

43:46

I think, and Samsung could be a little We almost kind of did this to ourselves a little bit of people or some of the perception out there as all know that the evil is better Ottawa to Cuba.

43:57

Better, know. That's a relative word, like what's. What's what's better. Why if you, if you have two things, and if this, if they're not absolutely identical, then yes. Technically one has to be better than the other. So technically on paper and if you look spec spec, where does it change? If you look down here and this is what we want to really, really educate and really get out there. And almost, in a sense, change, a perception that might exist out there with some. All the kubo is not as good.

44:25

Hugo, is every bit as good as that 8 70 evo.

44:29

From a day-to-day specification.

44:32

Put it in the system. What is it going to do?

44:35

565 35, 6530 I ops 90, AKA a.d.k.

44:41

over here 98 anas and what does that the ever so slight uptick in, in the in the write i-ops. Almost negligible you'll never even see your experience or notice.

44:54

So in a nutshell the Kubo and Evo R are nearly identical, OK, comparable specs.

45:01

The differences, because we're using ... on the kubo, as I mentioned and educated earlier, to keep costs down and to get the eight terabyte capacity, the longevity of the product or the life cycle of the product.

45:14

You know terabytes written if you were to put both of them the kubo and evolve in a system ran the same thing for the same amount of hours every day and let them go, which would last longer how many years or tariff.

45:27

Yes, based on how they're built and how they're designed The evil, the evil would last longer.

45:34

But for from a day to day budget cost application and right now almost like a band-aid when you can't if you don't have the evo.

45:45

What if, where there's a 1, 2, or a four terabyte evolve opportunity.

45:51

We have a 1 to 1 a 4, and a Kubo.

45:53

Like I said, it's every bit as good as the kubo that is every bit as good as the evo at a much more attractive price point, too.

46:00

So the the gap, unfortunately, is at the 250 of the 500 gigabyte capacity.

46:06

There is no kubo there to backfill any demand or need on the Evo.

46:12

So but 5700 on the eve of just quickly getting much, much better. So you're not going to almost need that in a kubo very soon because we're getting remember, we're getting this evil back up and running. So just really wanted to put this out there and put it in this type of way to, say, almost identical.

46:31

And the one difference is the longevity or that terrible, how many terabytes each of these would write to. And that's why the warranty is less on the kubo because its lifespan is technically on paper less than that of the e-book. That's all.

46:48

All right, so let's this week we talked about all of these sada drives.

46:55

Talked about all the VMAs talked about the portable.

46:59

This here is just getting away from a specification slide. This is really our kind of our core focus and our model highlight here. So, this is a nice little just, you know, kind of a fun slide. You have across the top.

47:11

You have those three NVME models, left to right. It's right now, it's better.

47:17

Better, best, better, good. It's the best one here. So, it's 980 pro on rivaled, 7000 megabytes a second. Great. For gaming builds and for all the high-end systems out there, 970 evil plus just sits, just sits that sweet spot of price and performance. That's why we just call it. It's like the best of our gen three. It's like that's that's where everybody seems to want that 970 evil plus 1 and 2 terabyte. I mean, for the past month or two I'd say you're not even three months. When we were a little bit tighter on NVME there was man when you get the 1 terabyte 2 terabyte naive up to 970 evil plus. Well, we have them now. We have it, we have them in great supply.

47:58

So, bring on your your demand and your need. And S, I could support you. And we could support ASI for you.

48:07

And then we got our new brand new entry level NVME 980 hits that 3500 megabytes that the gentry needs of its budget. It's cost, it's great. So that's why that's really start to just know snowball.

48:20

And then at the bottom, you got our two main Our main go choose on the side of 2.5 inch the vote, and the evil, again, up to eight terabytes. And we're seeing that a terrible received our forecast, and our demand, and our builds really start to ramp. It just grow, I mean, like, week, over week, and month, over month, it's just doing it really well. So that a 70 evo, as we get that back up and running. And a real. Real? Real good fashion, That's just extremely versatile. I mean, everybody just seems to really want that and that's great. It could do, It can do just about anything for any, any systems. So, that's why, we're just going to use that phrase there.

48:57

I'm not going to sit here on the back of this. These are the four newest models, the kubo, to evoke the 9 80 entry level, and the 980 pro, detailed information, facts, kinda charts and what it all has in it, just for extra extra information. You can see here by all its colorful little badges here. how great and how well received all of these products were and are from the review sites, from the market, the industry out there. Really, really proud. Why did that one have no 980, We make, When we built this, we probably didn't yet have those badges yet, back from those said sites. But it would look similar to all of these. But the really great accolades by all of the credible sites out there that the consumers, the B2B customers, the end users, are looking at and reading.

49:43

So just really what we, we were very, very proud of that.

49:47

I mean, anything we put our Samsung logo on and Ship has to be of the utmost Quality and to know that we're going to stand behind it. 110%, which, I mean, if you look up here, it's on it's on every slide of every presentation I do.

50:04

And most of most of the team does number one flash memory brand almost 20 years to decades straight of being the number-one flash memory brand in the world.

50:14

That's because of everybody collectively on this call, not just because, know, we, we build a great product, but because you will support it. You buy it, you build, you put it out there, it gets talked about, it gets reviewed, and it gets repurchased and word of mouth. So all of that collectively goes into that, so we're proud of it. Thank you again. Let me jump back up here as it is now. Good timing, 250.

50:38

I said I wouldn't talk for an hour. I almost did. Let's put it right here back on this, and I'll pause again. Are there questions, comments? Anything, anyone wants to chime in on mm?

50:51

Yeah, We've got some questions, so we'll go ahead and finish up our session with the questions here.

50:57

So let me go ahead and And get these asked to you first.

51:04

Are there any tools or anything that Samsung has for kind of measuring how much life is left on the drive or measuring performance of the drive? You know, is that overheating isn't running properly?

51:17

Do you have any kind of tools like that, that that come with the Drive or that you also want to mention?

51:23

I believe, that's our Samsung magicians, Samsung logician Software Chev is, Is that accurate right that could do what was just asked or requested?

51:34

Yeah, we have the same sandwiches and software and also the SAMHSA migration software.

51:40

If you need a clone, your current hard disk or SSD over to Sam Sciences to, those two software's are free on the website.

51:50

Thank you, check. Yes. see so there you go. Yes, we do.

51:53

So, Chen, can you actually repeat that?

51:55

Because we do have a customer that asks specifically about they have a lot of customers that they want to upgrade their notebooks to either a larger capacity or go from a hard drive to a sada SSP on the notebooks Died.

52:09

And they were looking for solution for copying the data or moving the data. So, can you mention that again one more time.

52:18

Yeah, that to copy the data is called the same some migration software, and it's, it's very user friendly. Literally. It's, you click through things and I'll call your entire hard drive over to the new SSD, but it only works on Samsung SSD, so just keep that, good as good.

52:38

Great.

52:40

I know you kinda talked earlier about our, you have up, actually, up on this slide we've had a couple of questions on the enterprise side and kinda, forgive me for not knowing that, that product lineup and hope lead on Aska appending question here.

52:54

But for customers that need an enterprise class, SATA drive, What are their options? Do they, do they need to use, like a 7670 SATA drive?

53:07

Or is there something in the enterprise class that we didn't actually show here that you would recommend?

53:13

Because we have quite a few customers asking about that.

53:17

So, we could take that offline. We don't have anything. When I say we myself, Chen, team rubin. We don't have any enterprise or OEM level or DCT level drives currently today to sell what, But because of our other division, if a customer is in is an absolute need of that. Samsung does still have obviously OEM and DCT level drives so we could, we could try and direct them or get them some assistance. So after you know after this you know if you reach out to flow the flow, the questions up to you know to your ASI rep or reach out to Reboot or Sean based on where you are in, on the map. And we could try to guide you in direct you if we, as best we can.

54:05

Great. Looking at the 870 series specifically the kubo and the Evo do those have Power loss protection?

54:18

Gen.

54:19

Now those those doesn't though, that's the three. Like given our 50 DCT didn't have access to a three DCT data center.

54:31

Thank you, thank you.

54:34

OK, let me just take a quick look here and make sure that we don't have any other questions. There are a couple more that I'm gonna go ahead and ask.

54:43

And we didn't talk too much about no partner programs or anything like that, but if customers are interested in demo units or anything along those lines, do you guys have options for that or product?

54:58

Sure, sure. So, so that's a good question. Good topic and question in general. So the for everybody auditing for everybody here who is hopefully and probably already unauthorized reseller, but if you're if you're not yet for whatever reason, if you are new, let's say two ASI into Samsung.

55:17

in order to to get a quote and to purchase Samsung SST need to be an authorized resellers, theirs and the sales team will provide the link to our form to fill out the form. We quickly review, most of the time approve to sign you want so you can get quotes and build Bob.

55:34

We drew a line last year. We changed it a little bit to make it a little bit easier. Anything 512 gig and lower, you can get you can get a quote and purchase product. You get up and running enrolling before your fully authorized one to anything one terabyte, and higher, you need to be fully vetted and authorized reseller, which takes, like I said, very, very quick. It takes probably 10, 15 minutes to fill out the form. You send it in, and we review it. And approve

usually, within a day, but 512 and lower. While you're in the process of filling out the form and submitting it, you can immediately start getting quotes and makes the purchases of 5700 Because those are lower. lower. Cost capacity, transactional, as far as demo units and things like that, well, once you're signed on and you're an authorized resellers, you have the conversation with your rep at at, at at a psi.

56:27

And or with Rubin and Sean, what your need is You know what you're looking to do with it. And we do have a program that usually caps out at about two units of 50% off our everyday map price to allow you to purchase for for for demos. But it is with approval, so it has to be kind of communicated back to your Samsung contact and then flows over through product marketing. We review, we look at it, and that is the that's the program that exists with with proper approvals.

56:59

OK, All right, so I have one more question. And I don't know, actually, if anybody online can actually answer this.

57:06

Because I don't know if we have anybody from this group, but we do have a customer who had a question or has an issue with a Samsung curved display and they were asking if there was anybody on the call that could answer that question.

57:20

If there's not that I have, that's individuals' e-mail and we will get that over to you.

57:26

Nick, and if you could pass it onto the right person, that would be great, but just taken a total stab in the dark.

57:32

Is there anybody on the call that could handle that type of question, or no?

57:37

Well, well, there's I mean, there's only one who would be equipped to, I don't know if it's proper for us to do it. I wouldn't want to kind of steer give the wrong answer. I mean, as I said, you don't Chen is technology, but his eyes closed, but I don't want to put him on the spot. And it's really about the proper thing, because we run and we work on the SST Department Division so send over the question, and we'll get it, will get it into the proper hands.

58:01

Great. That's, that's perfect, that'll. that'll work. Outstanding fellow, will go ahead and do that. So, with that final question, I'm gonna go ahead and wrap things up here.

58:11

I want to ask everybody to hang on, just for a couple of minutes, while we kinda close things out.

58:17

Really quick. So I wanted to make a couple of announcements. First.

58:21

Uh, as we kinda talked earlier on in the sessions, we went ahead and added a fifth day tomorrow, which is just kind of an ASI day to talk about some of the things that are happening in the market.

58:34

We're going to spend some time talking about, you know, the shortages and what kind of things have been impacting supply throughout the past year and kind of continue to pull on the stirrings of of supply constraint. Because we move forward in the next coming quarters here. So, we're going to talk a little bit about that tomorrow.

58:53

We're going to talk about any tells 12 gen processor launch.

58:58

Intel did kind of hit on that topic, but there's other things around the motherboard and memory and and different types of components that we wanted to make sure that you guys were aware of an up to date on. So, we'll cover that a little bit tomorrow, as well.

59:13

We have a couple of programs that we have going on at ASI, that I also wanted to mention.

59:18

So if you're available to join us, I'll send out the invite again, because you have to register for this, because we didn't plan for it. So, send it out, again, if you're already registered. Ignore the e-mail. If you haven't, and you would like to join, or you'd like to register, please go ahead and do that. I'll send the invite out.

59:35

You can, you can complete it.

59:37

and join us for tomorrow for today, since this is our final session, we do have the Samsung LCD which will give away, you know, we'll probably announce that winter tomorrow. But I'll also send it out by e-mail, but so that everybody knows, you know, who won and you know, that we gave away the prize.

59:58

In addition to that, we still have the LP 2385 all in one system.

1:00:05

That will be giving away as the grand prize, So we'll also announce the winner of that through, through e-mails.

1:00:11

So, for the things that we're giving away today, from this session and for our grand prize, we'll announce those through e-mail.

1:00:18

So, do you look for, you know, continuous e-mails from me for the next week or so, as you know, new information comes out. I try to get that out to you guys.

1:00:28

So, you know, look for some e-mails for me in the coming coming weeks, just about different things, technology wise, and prizes, and events and other stuff like that. So, I will be sending you e-mails. I try not to bother you guys, but if it's important, I'm definitely going to send it out.

1:00:45

So, with that, you know, I want to thank everyone for joining us for this week, and attending our Technology Summit.

1:00:51

The next one that we have will be for Q four, and that will be on November first, or it will be kicking off on November first.

1:01:00

Wink, wink. Very close to the launch day for Intel 12, Jen.

1:01:05

If not, be, launch day, So, you know, kind of take that for what it's worth, but that'll be our next session. So look for the invites for that as well. But on behalf of that, I really want to thank all of our customers for joining us. And Teal, Samsung.

1:01:22

Thank you so much for for sitting in and for being here with us today to go over this information with our customers.

1:01:28

Nick, is there anything you wanted to say in closing before we give everybody back the rest of their day?

1:01:34

Just just just thank you again for all the support and let's, let's have a great end of Q three. and let's really end 20, 21 strong with the great Q for and looking forward to, you know, more and more opportunities of builds. And business with everyone. Thank you. Stay well.

1:01:50

All right. Great. With that, we'll go ahead and end the session. Thanks again, everyone, and look for e-mails from me in the next coming coming days. So thanks, everyone.

1:02:00

Bye, everyone.