

PANEL: Wall Street Evaluates EDA

Chair: Aart de Geus, Synopsys

Organizers: Sharon Turnoy, Synopsys and Deirdre Hanford, Synopsys

Abstract

The EDA sector is capturing unprecedented attention on Wall Street. With seven IPOs in 2001 alone and strong performance by the EDA “blue chips,” the industry has gained new prominence with the capital markets. In this panel, Aart de Geus will moderate a discussion between representatives of the various constituencies who play a role in shaping Wall Street’s opinion of EDA: financial analysts, portfolio managers, venture capitalists, CEOs, and the press.

Questions discussed will include: How do investors and analysts currently view EDA? What contributes to that perception? What factors drive EDA’s current favor with Wall Street, and why is the sector “hot” compared to two to three years ago? How do we sustain that favor? Given the highly complex nature of our industry, how do investors decipher the strength of a particular EDA firm? Is EDA tied to the semiconductor industry’s performance? What role does the press play in shaping the view?

Panelists

Moshe Gavrielov
Verisity

Richard Goering
EE Times

Lucio Lanza,
Lanza techVentures

Vishal Saluja
Seligman Technology Group

Jay Vleeschhouwer
Merrill Lynch & Company Inc.