

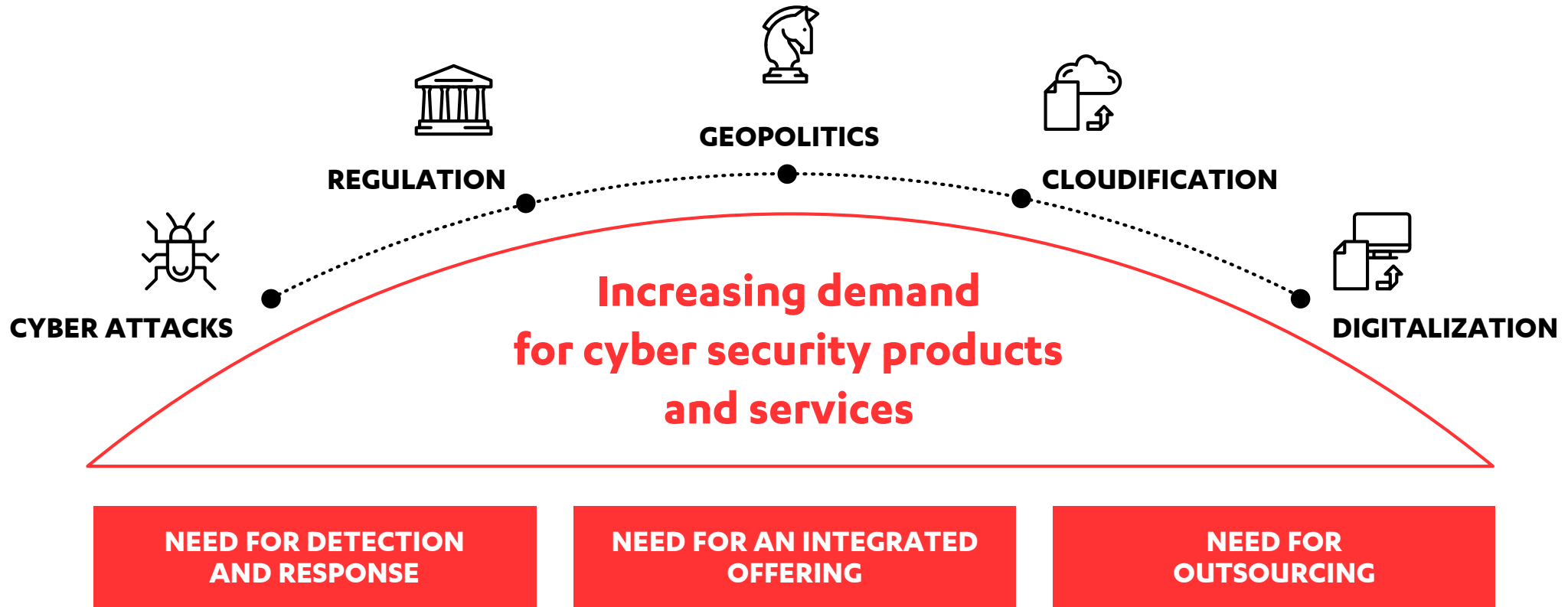
STRATEGY

PEACE OF MIND AS A SERVICE

Samu Konttinen, CEO

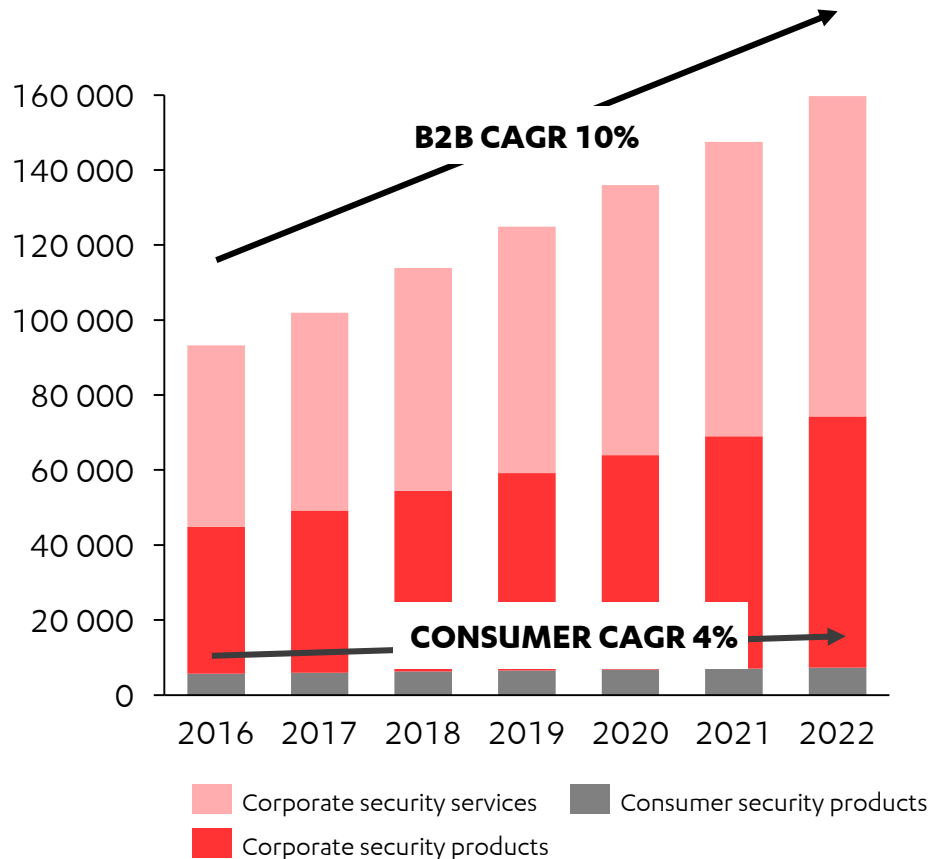


MEGATRENDS CONTINUE TO SUPPORT OUR STRATEGY



CORPORATE SECURITY IS DRIVING THE INDUSTRY

Market size, USD billion



Source: Gartner, Forecast: Information Security and Risk Management, Worldwide, 2016-2022, 3Q18

**MANAGED
DETECTION AND
RESPONSE¹⁾**

**ENDPOINT
PROTECTION &
EDR²⁾**

**VULNERABILITY
MANAGEMENT²⁾**

**SECURITY
CONSULTING²⁾**

“Fast growth”

“Accelerating”

“Growth”

“Growth”



0.4
BILLION

CAGR 2017-22
31.6%



5.0
BILLION

CAGR 2016-22
6.0%



0.9
BILLION

CAGR 2016-22
7.4%



19.0
BILLION

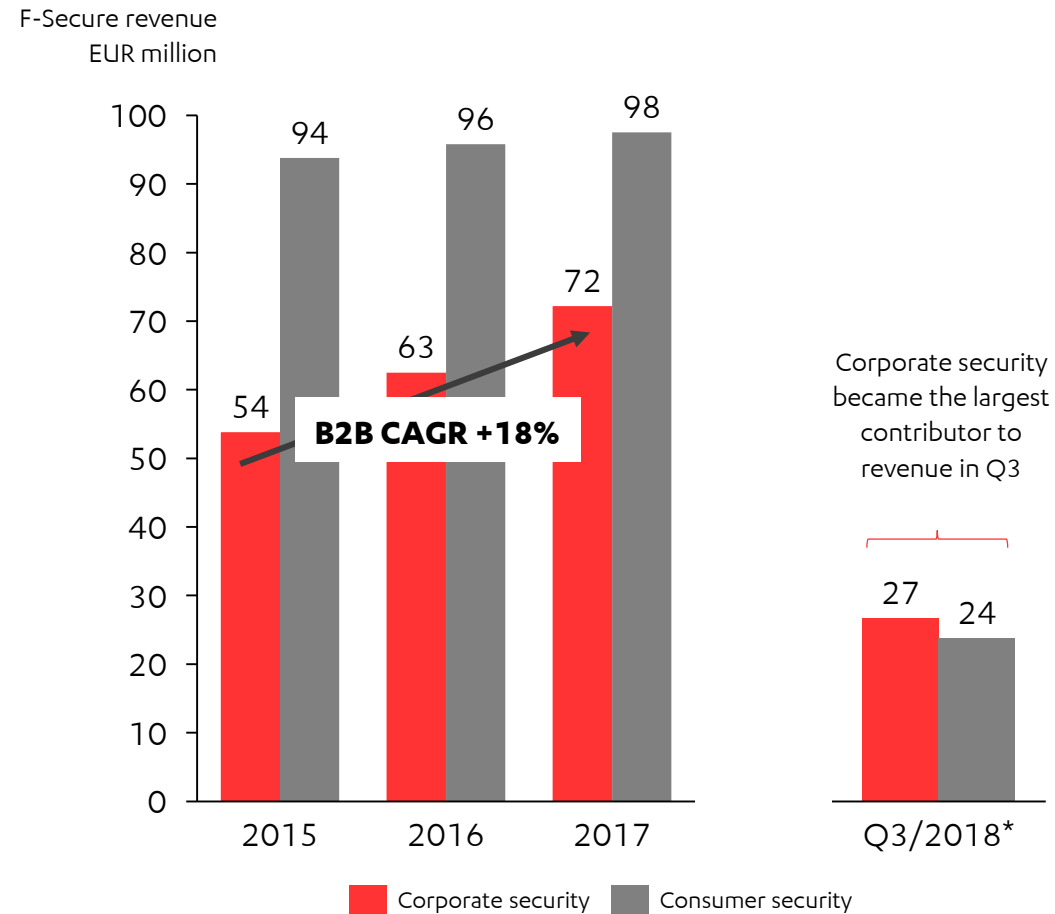
CAGR 2016-22
9.9%

Sources:

1) CAGR 2017-2022 <https://www.marketsandmarkets.com/PressReleases/managed-detection-and-response.asp> (November 2017)

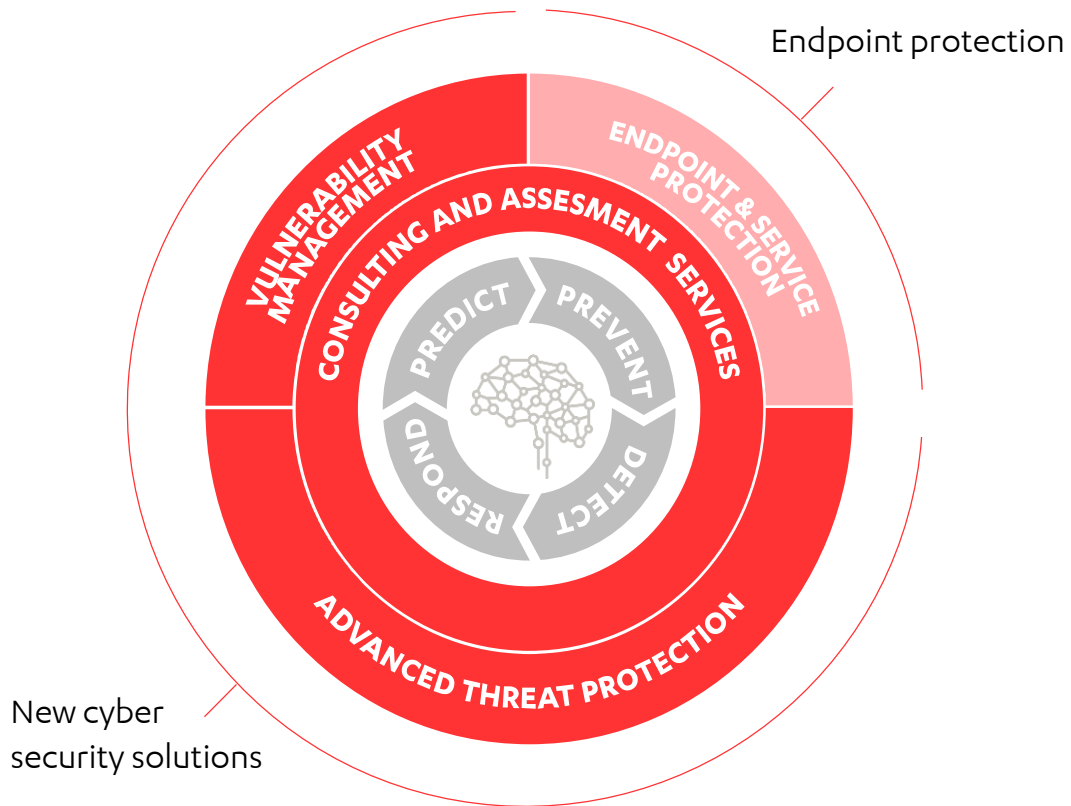
2) CAGR 2016-2022 Gartner, Forecast: Information Security and Risk Management, Worldwide, 2016-2022, 3Q18 (November 2017)

CORPORATE SECURITY IS NOW OUR LARGEST BUSINESS

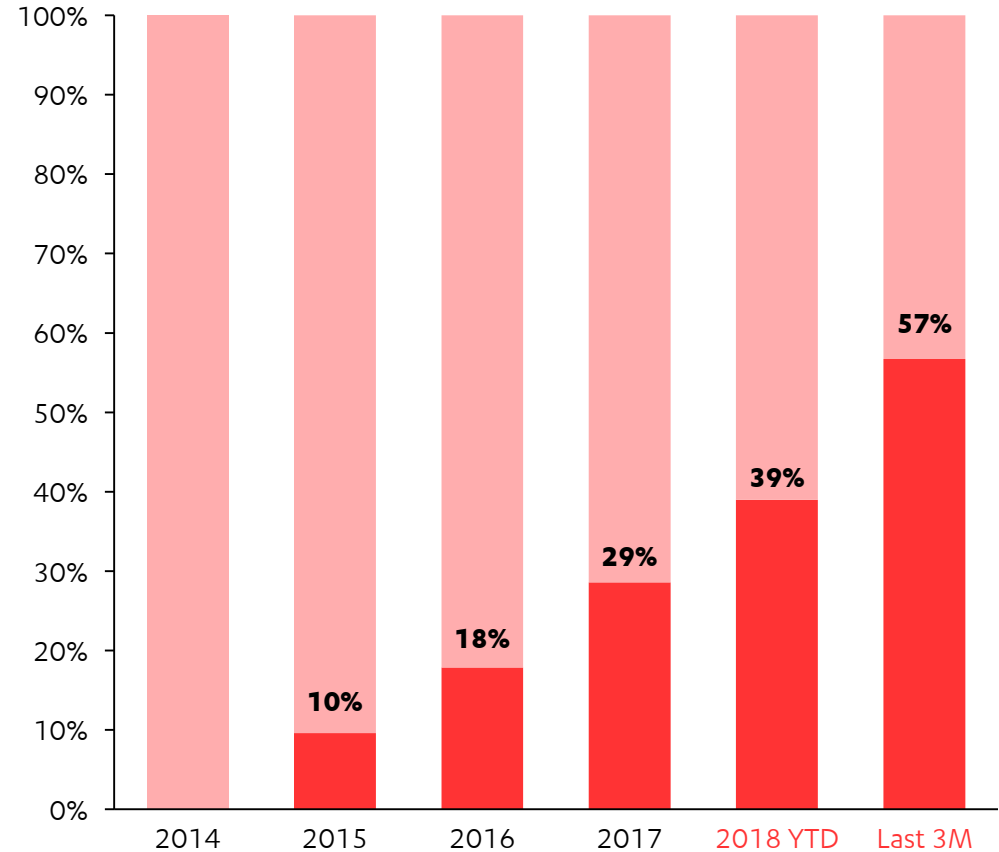


* Including the acquisition of MWR InfoSecurity on 2 July 2018.

INCREASING SHARE OF OUR B2B SOLUTIONS ARE ADDRESSING FAST GROWTH MARKETS









Order Intake, % of total



■ Endpoint protection (EPP)
■ New cyber security solutions

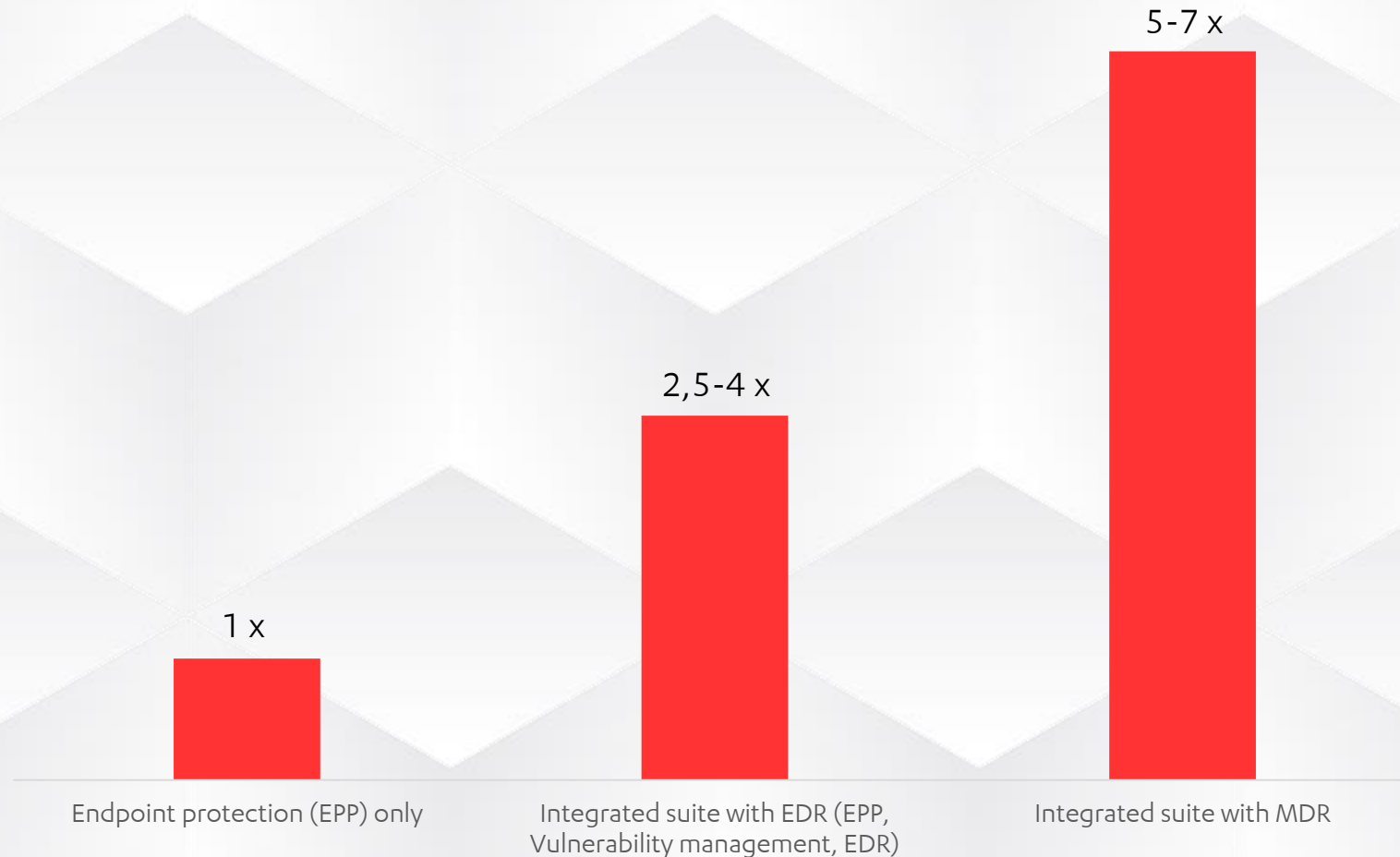
* Includes cyber security services, detection and response solutions, vulnerability management solutions and other corporate solutions

OUR **UNIQUE MIX** OF SOLUTIONS

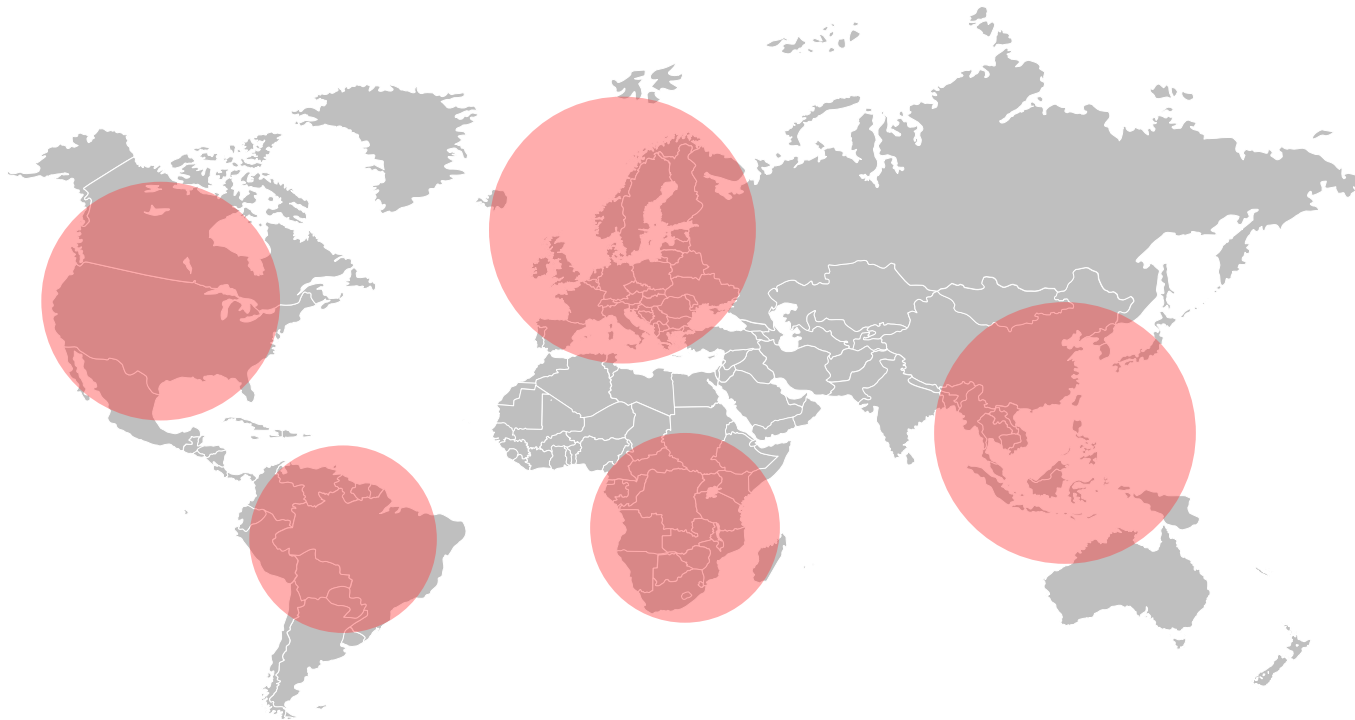
PREDICT		PREVENT		DETECT & RESPOND	
Cyber security consulting					
					
2016	2018		2018	2016	2018
Vulnerability management	Anti-phishing behavioral management	Endpoint protection	Endpoint detection and response	Managed Detection & Response	Managed Threat Hunting
Radar	Phishd	Protection Service for Business	Rapid Detection & Response (EDR)	Countercept (MDR)*	

* Including RDS

EXAMPLE OF A MIDMARKET CUSTOMER OPPORTUNITIES FOR CROSS-SELL



WE HAVE UNIQUE VISIBILITY INTO **REAL-LIFE ATTACKS** IN ALL MARKETS



**Data from millions
of endpoint
worldwide**

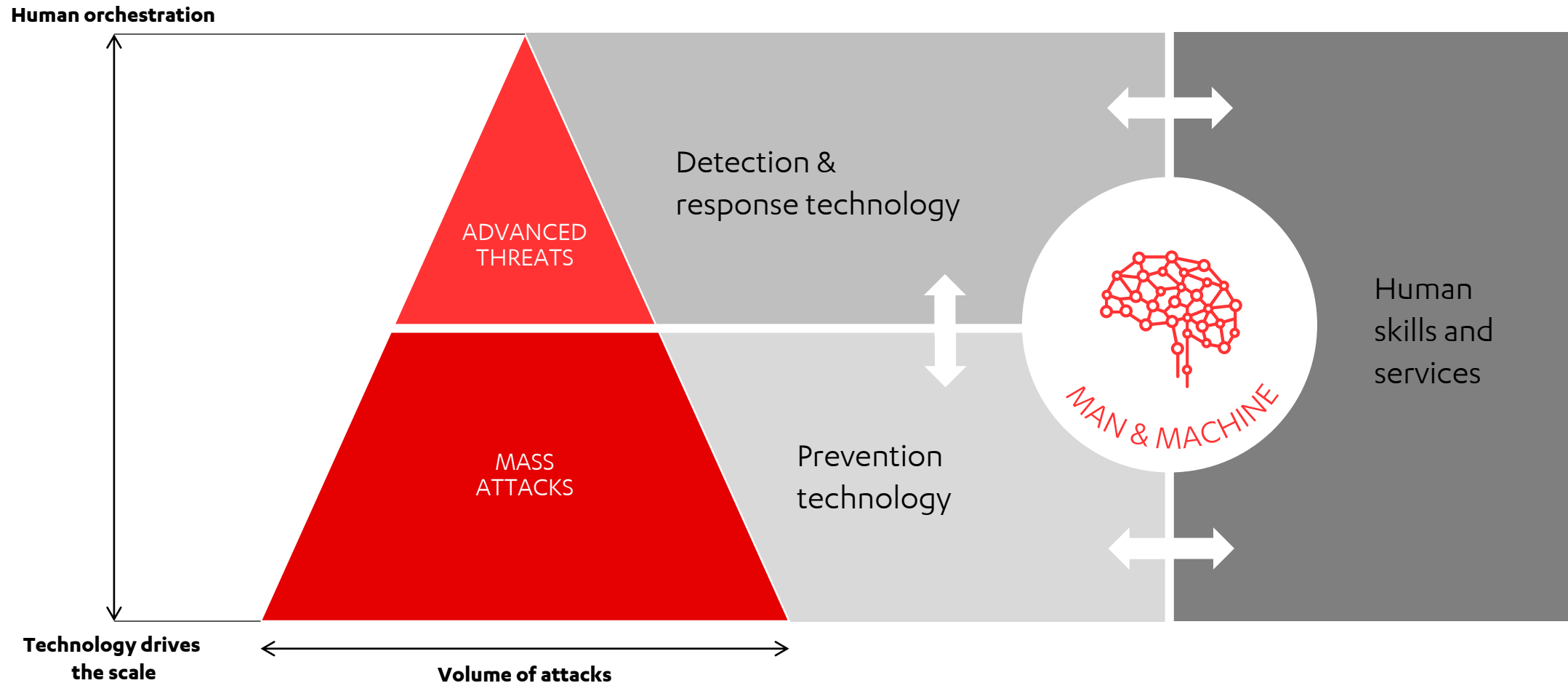


**World-renowned
F-Secure Labs**

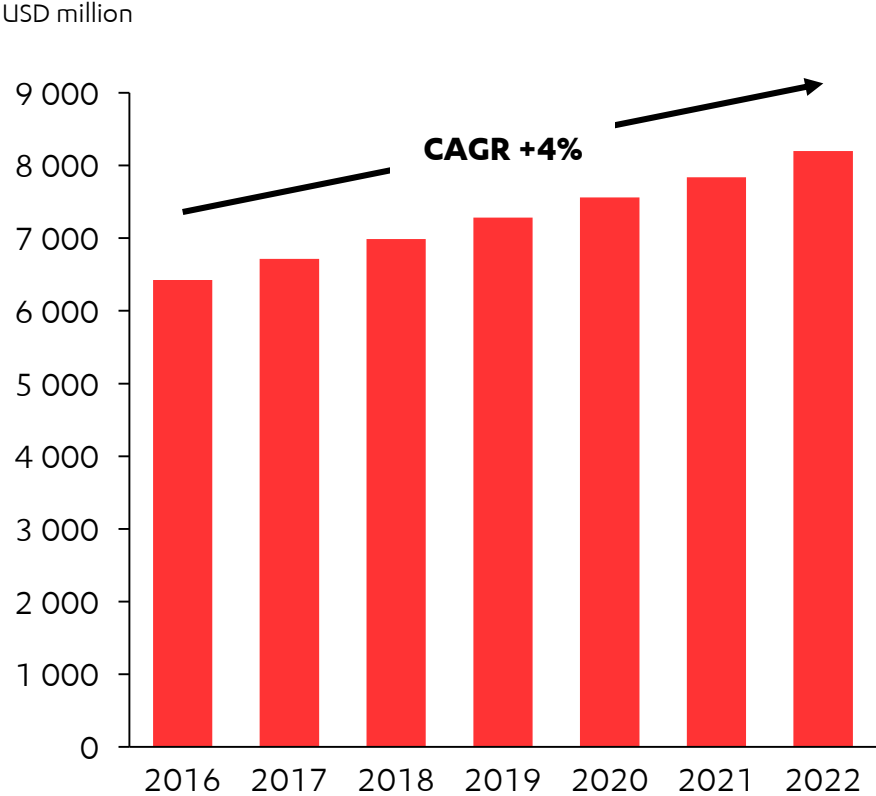


**24/7/365
Incident Response**

OUR **MAN & MACHINE** APPROACH OFFERS UNIQUE COMPETITIVE ADVANTAGE



EMERGING NEW SOLUTIONS ARE DRIVING GROWTH IN THE CONSUMER SECURITY MARKET



 VPN & Privacy	 Connected Home Security
 Multi-device Security	 Password Management

Source: Gartner, Forecast: Information Security and Risk Management, Worldwide, 2016-2022, 3Q18

STRENGTHS OF F-SECURE'S CONSUMER SECURITY BUSINESS

EFFICIENT GO-TO-MARKET GLOBALLY

Global market leader in providing security via around 200 operators

NEW MARKET OPPORTUNITIES

A front runner digital home security solutions

CROSS-SELL AND UPSELL OPPORTUNITIES

Complete security & privacy offering addressing consumers' needs

IMPROVING BUSINESS METRICS

Strong and sustainable business model (AARPU, activations, renewals)

FOCUS AREAS

Enterprise-grade cyber security

- Market leadership in advanced detection and response solutions
- Increase share of wallet by cross-selling and upselling with the integrated cyber security suite
- Continued growth and excellence in cyber security consulting
- Addressing new opportunities in consumer security

