

Samu Konttinen, CEO

F-SECURE STRATEGY

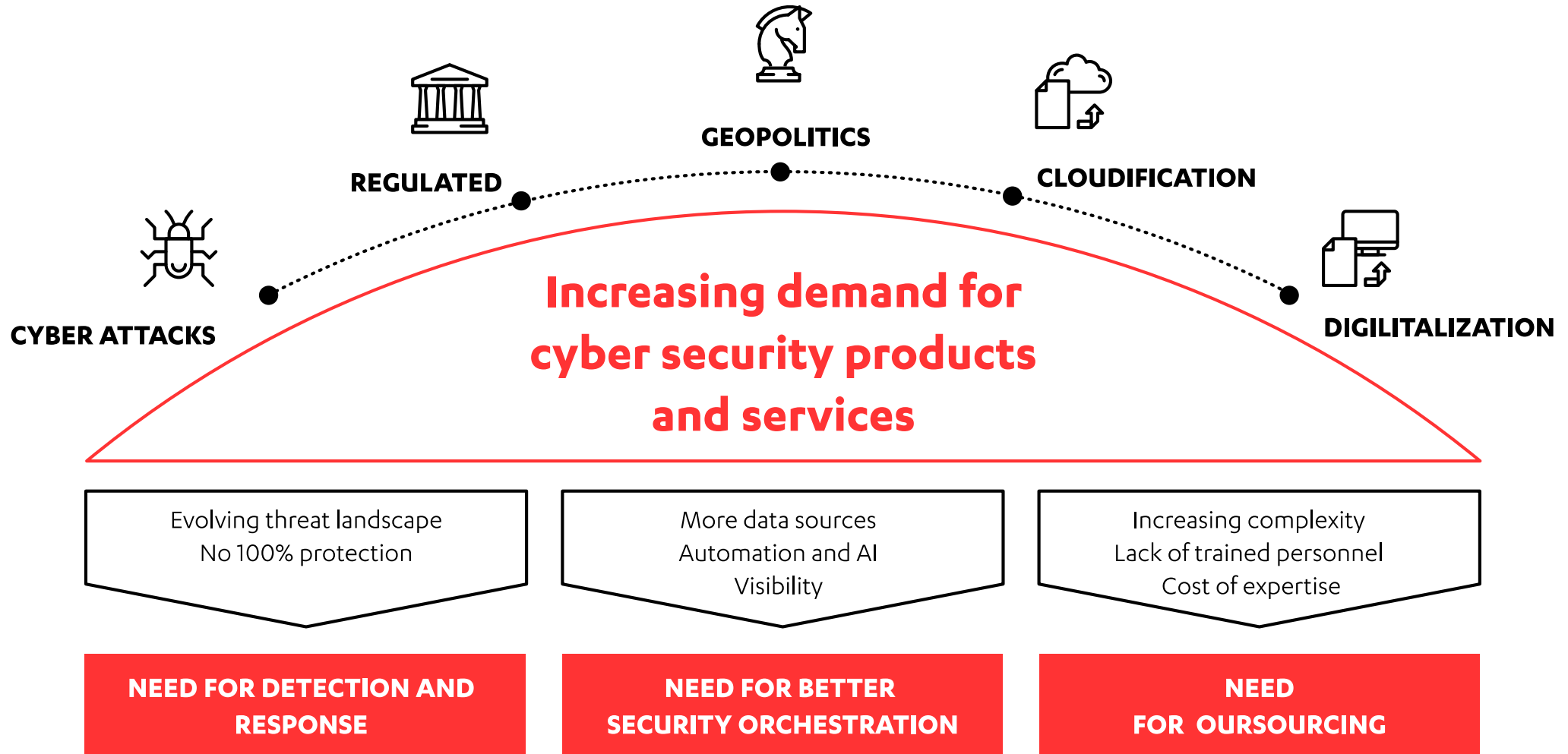
GEARING FOR ACCELERATED GROWTH



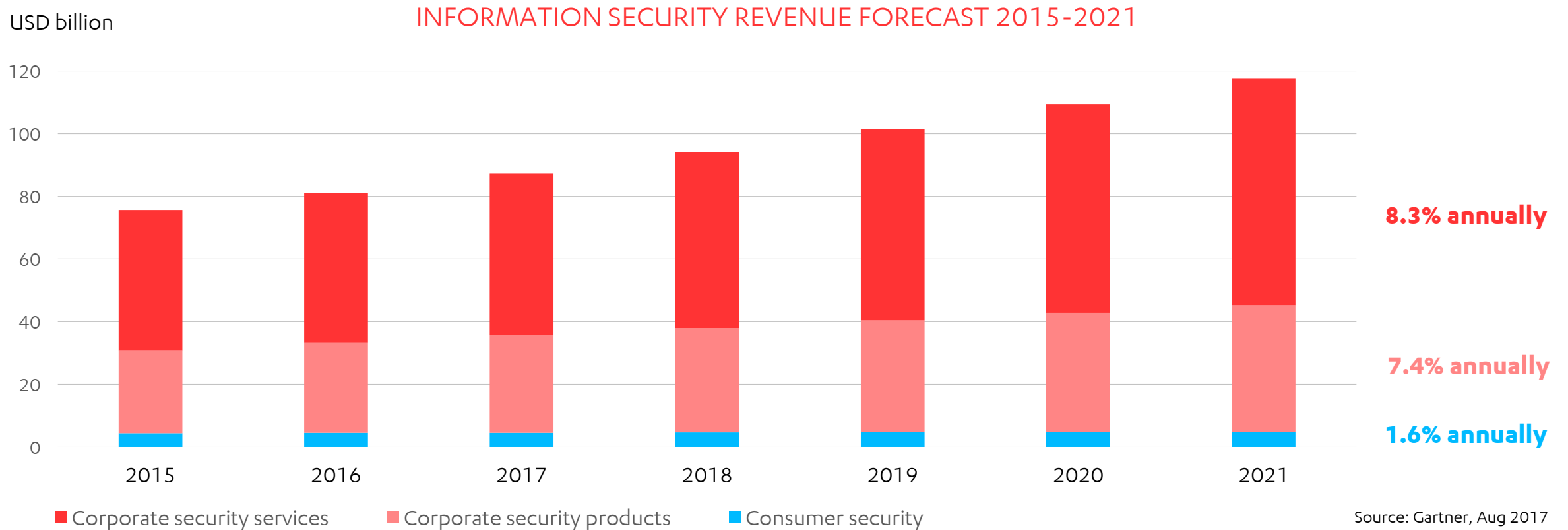
F-SECURE'S TRANSFORMATION CONTINUES



MEGATRENDS



CORPORATE SECURITY CONTINUES TO DRIVE THE GROWTH



DIFFERENCES BETWEEN SEGMENTS

ENDPOINT PROTECTION

“Mature”



3,5
BILLION

CAGR 2015-21
2.4%

Source:
Gartner

ENDPOINT DETECTION & RESPONSE

“Emerging”



0,4
BILLION

CAGR 2015-20
45.3%

Source:
Gartner

VULNERABILITY MANAGEMENT

“Fast growth”



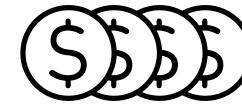
1,0
BILLION

CAGR 2015-20
13.0%

Source:
IDC

CYBER SECURITY SERVICES

“Fast growth”



16,0
BILLION

CAGR 2015-20
10.0%

Source:
Markets&Markets

CONSUMER SECURITY

“Mature”



4,6
BILLION

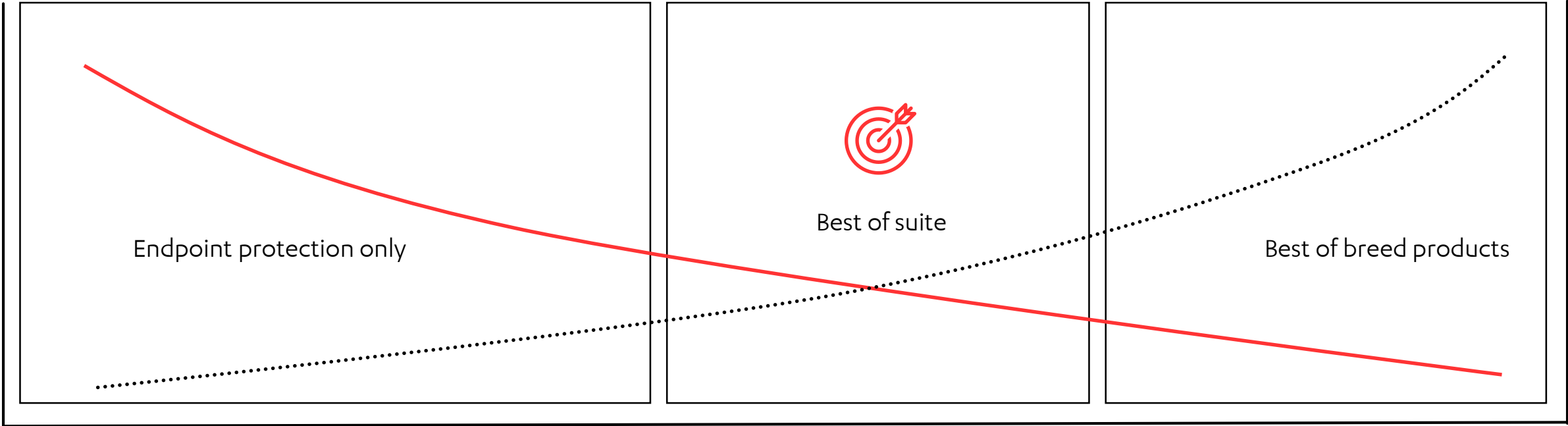
CAGR 2015-21
1.3%

Source:
Gartner

CHANNEL PAYS A BIG ROLE WITH MID-MARKET CUSTOMERS & CONSUMERS

Channel influence

Product differentiation



Customer size



Consumers



Small companies



Mid-market



Enterprise

MID-MARKET HAS BROADER NEEDS & MORE CAPACITY TO SPEND

Company size

Available budget*

Customer focus

| | | | | | |
|---|---|---|---|---------|----------------------------|
|  | SMALL COMPANIES 25–200 seats | |  | 1k–10k | Endpoint protection |
|  | MID-MARKET 200–5000 seats |  |  | 100k–1M | Best of Suite |
|  | ENTERPRISES +5000 seats | |  | 1M–5M | Best of Breed |

* SOURCE: SANS institute

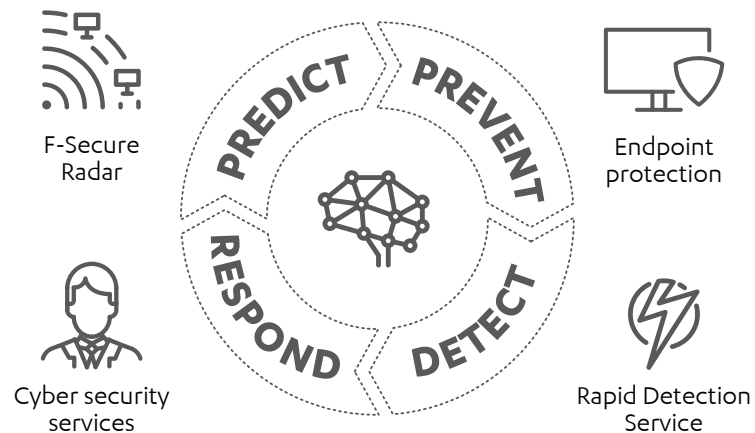
EXPANSION OF F-SECURE'S OFFERING FOR MID-MARKET

ENDPOINT PROTECTION ONLY



– 2015

COMPREHENSIVE CYBER SECURITY OFFERING



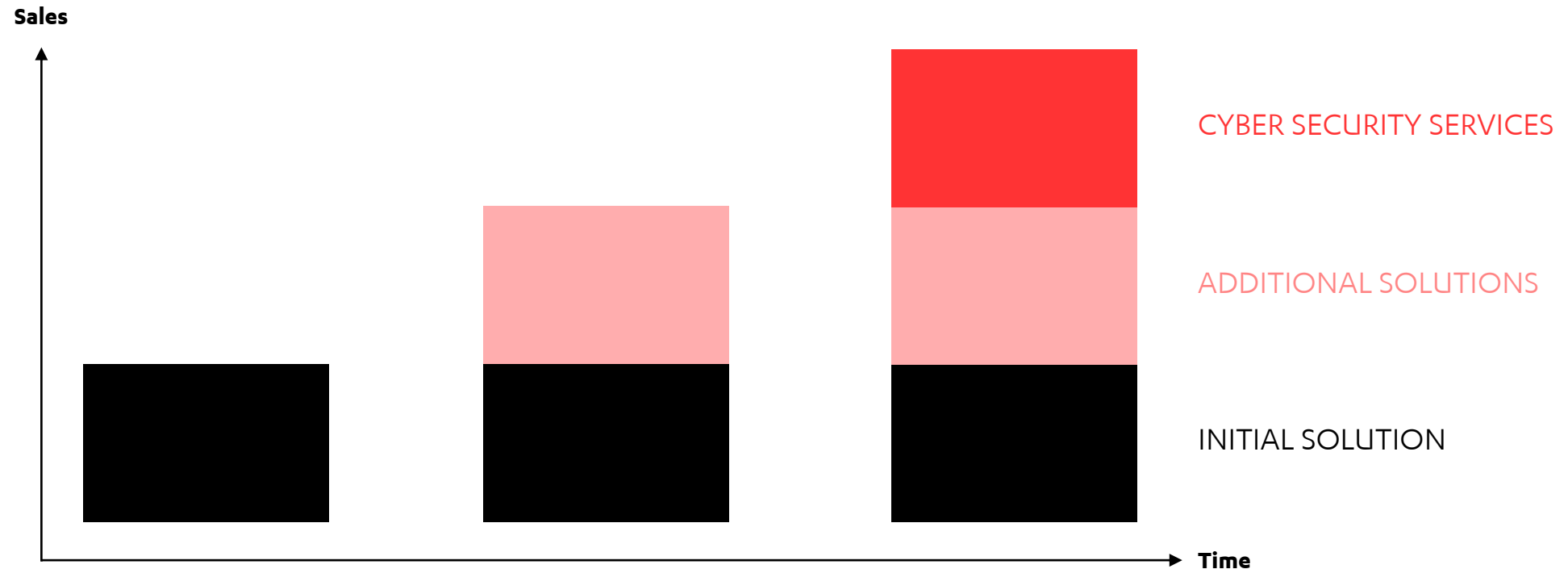
2015–2017

INTEGRATED SECURITY SUITE FOR MID-MARKET

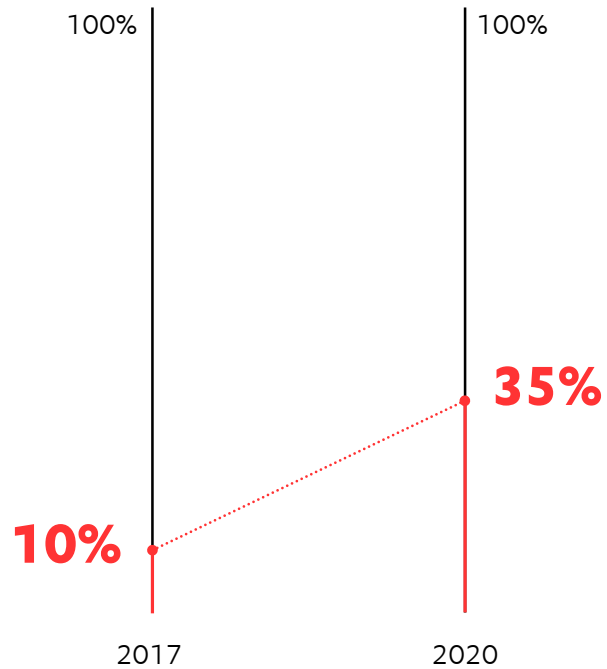


2018 –

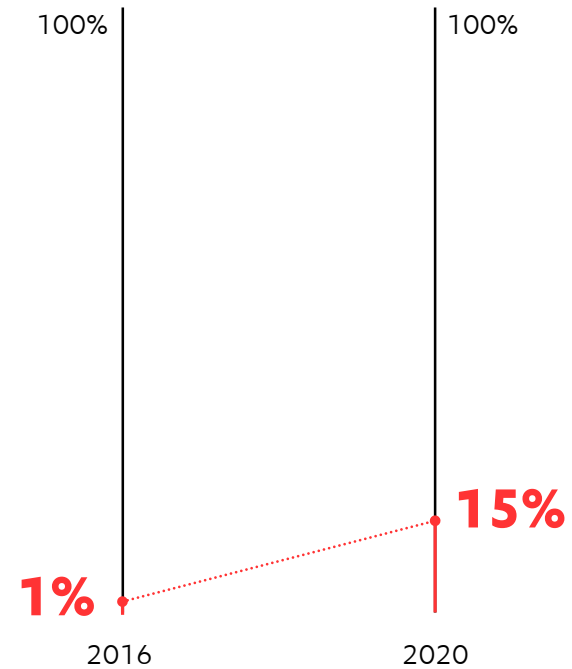
BROADER OFFERING EXPANDS BUSINESS OPPORTUNITIES



DETECTION CAPABILITIES OFFER TWO FAST GROWTH MARKETS



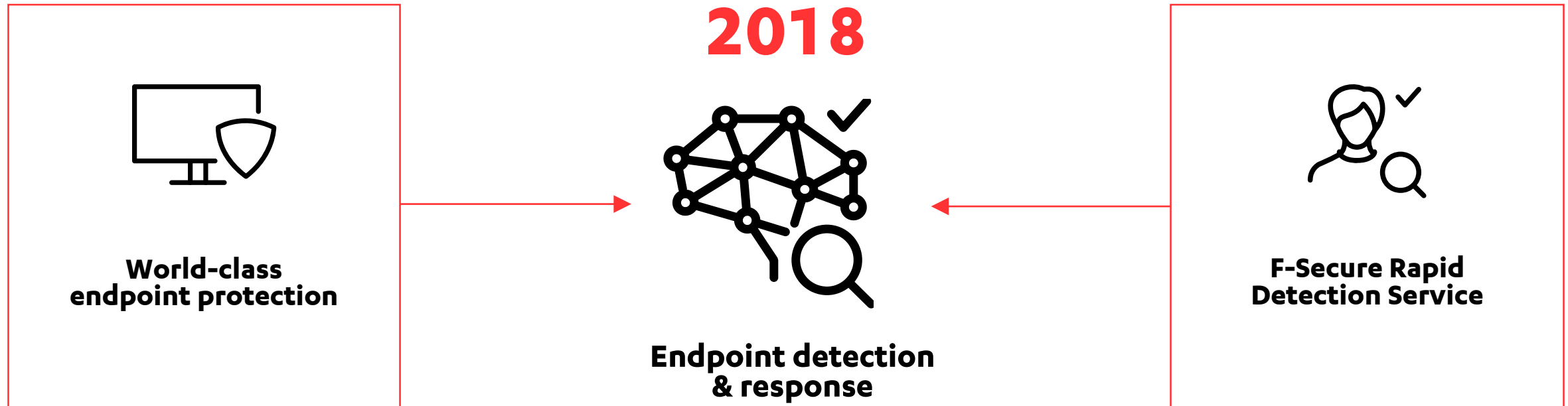
SHARE OF ENDPOINTS
WITH AUTOMATED DETECTION
CAPABILITIES



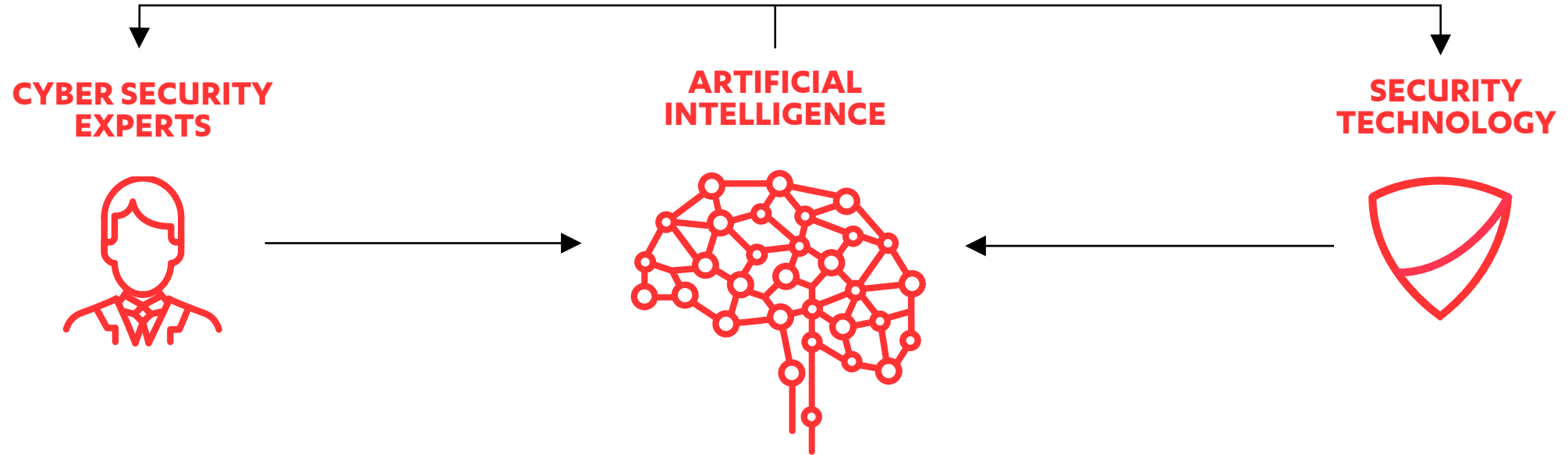
SHARE OF COMPANIES
WITH DETECTION
AS A SERVICE

Sources: "Forecast Snapshot:
EDR" 3/2017, "Market Guide for
MDR Services" 5/2017, Gartner

BRINGING TOGETHER ENDPOINT PROTECTION AND DETECTION & RESPONSE



COMBINATION OF MAN & MACHINE OFFERS UNIQUE COMPETITIVE ADVANTAGE



SCALABILITY THROUGH A GLOBAL NETWORK OF PARTNERS

**CORPORATE SECURITY
PRODUCTS & SERVICES**

RESELLERS
6000+

**CYBER SECURITY
SERVICES**

100,000+ COMPANIES

**HUNDREDS OF LARGE
ENTERPRISES**

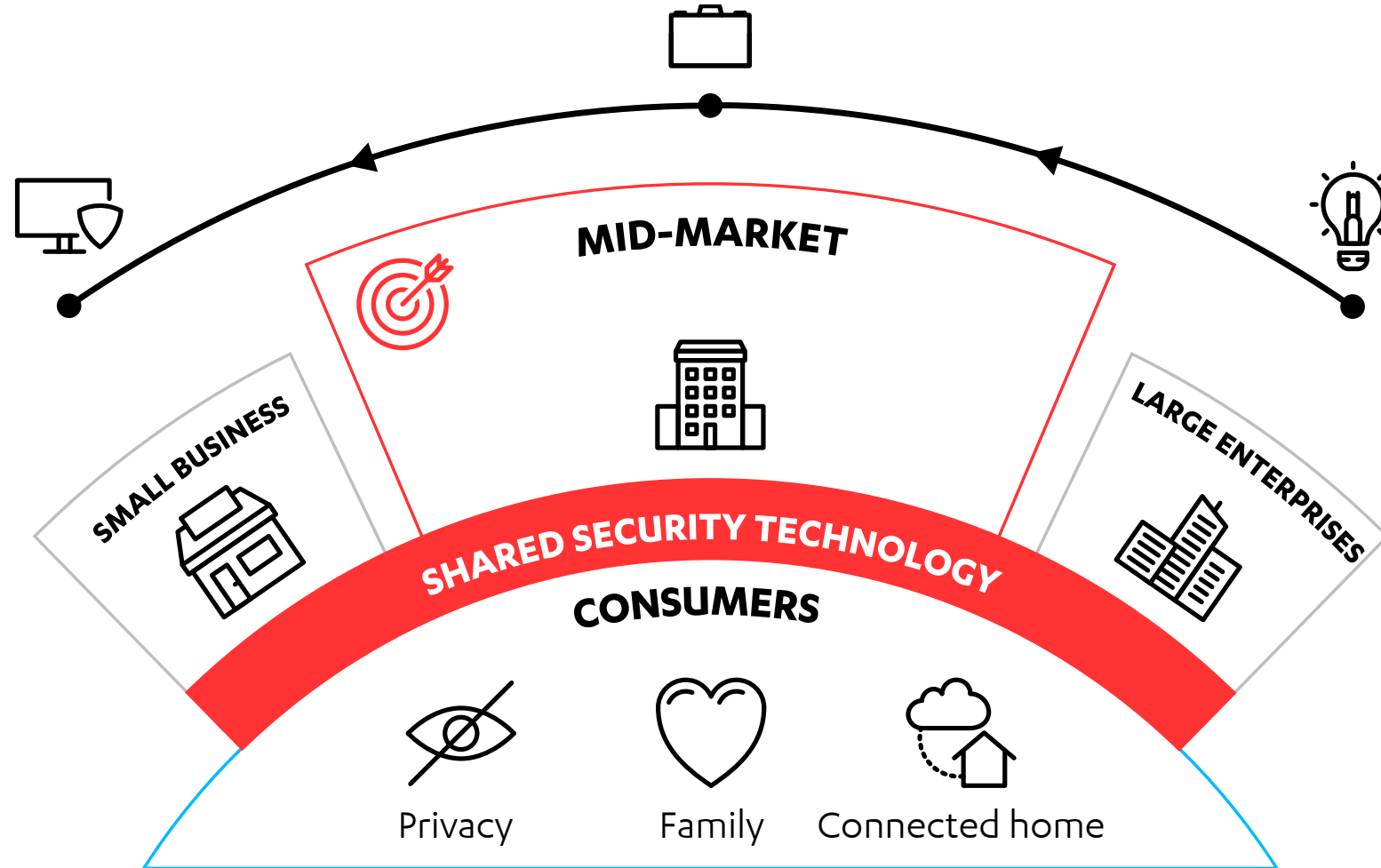
**CONSUMER SECURITY
PRODUCTS**

OPERATORS
200+ globally

RETAIL & ETAIL

TENS OF MILLIONS OF CONSUMERS

SYNERGIES ACROSS SEGMENTS



F-SECURE GROWTH DRIVERS



- Wider and better integrated portfolio
- Increase in share of wallet by cross-selling and upselling
- Adding new customers in focus geographies
- Best in class renewal rates
- Active M&A