MEGATRENDS CONTINUE TO SUPPORT OUR STRATEGY

Increasing demand for cyber security products and services

- Need for Detection and Response
- Need for an Integrated Offering
- Need for Outsourcing
CORPORATE SECURITY IS DRIVING THE INDUSTRY

Market size, USD billion

- B2B CAGR 10%
- CONSUMER CAGR 4%

<table>
<thead>
<tr>
<th>Product Type</th>
<th>CAGR 2017-22</th>
<th>CAGR 2016-22</th>
<th>CAGR 2016-22</th>
<th>CAGR 2016-22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managed Detection and Response</td>
<td>31.6%</td>
<td>6.0%</td>
<td>7.4%</td>
<td>9.9%</td>
</tr>
<tr>
<td>Endpoint Protection &amp; EDR</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Vulnerability Management</td>
<td></td>
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<tr>
<td>Security Consulting</td>
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</tbody>
</table>

Sources:
CORPORATE SECURITY IS NOW OUR LARGEST BUSINESS

F-Secure revenue
EUR million

2015 2016 2017
54 63 72
94 96 98

Corporate security and Consumer security

Corporate security became the largest contributor to revenue in Q3

INCREASING SHARE OF OUR B2B SOLUTIONS ARE ADDRESSING FAST GROWTH MARKETS

Order Intake, % of total

- Endpoint protection (EPP)
- New cyber security solutions

2014: 10%
2015: 18%
2016: 29%
2017: 39%
2018 YTD: 57%
Last 3M: 57%

* Includes cyber security services, detection and response solutions, vulnerability management solutions and other corporate solutions
## OUR UNIQUE MIX OF SOLUTIONS

<table>
<thead>
<tr>
<th>PREDICT</th>
<th>PREVENT</th>
<th>DETECT &amp; RESPOND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vulnerability management</td>
<td>Anti-phishing behavioral management</td>
<td>Endpoint protection</td>
</tr>
<tr>
<td>2016</td>
<td>2018</td>
<td>2018</td>
</tr>
<tr>
<td>Endpoint detection and response</td>
<td>Managed Detection &amp; Response</td>
<td>Managed Threat Hunting</td>
</tr>
<tr>
<td>2018</td>
<td>2016</td>
<td>2018</td>
</tr>
<tr>
<td>Radar</td>
<td>Phishd</td>
<td>Protection Service for Business</td>
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<tr>
<td></td>
<td></td>
<td>Rapid Detection &amp; Response (EDR)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Countercept (MDR)*</td>
</tr>
</tbody>
</table>

* Including RDS
EXAMPLE OF A MIDMARKET CUSTOMER OPPORTUNITIES FOR CROSS-SELL

- Endpoint protection (EPP) only: 1 x
- Integrated suite with EDR (EPP, Vulnerability management, EDR): 2.5-4 x
- Integrated suite with MDR: 5-7 x
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

Human orchestration

- **ADVANCED THREATS**
- **MASS ATTACKS**

Technology drives the scale

Volume of attacks

Detection & response technology

Prevention technology

Human skills and services

Technology drives the scale
EMERGING NEW SOLUTIONS ARE DRIVING GROWTH IN THE CONSUMER SECURITY MARKET

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

USD million

CAGR +4%


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 proving 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