
Stonesoft in the security market: position, competitive advantage and growth outlook

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Capital Markets Day

Juha Kivikoski
COO
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Network Security

Customers
and
markets we serve



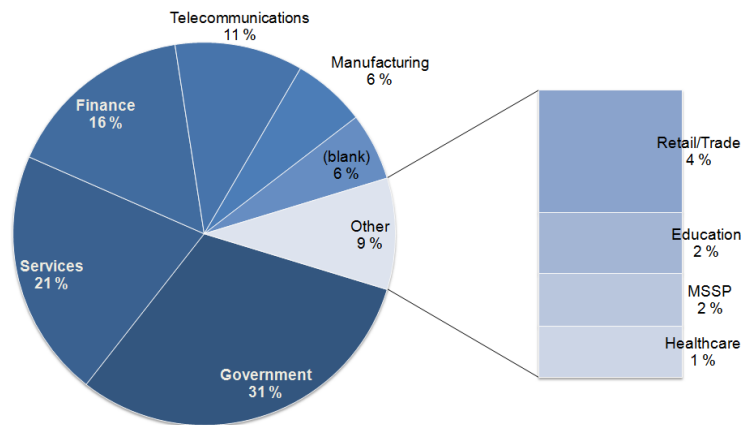
Facts and figures

- Founded in 1990 - celebrating 20 years of enterprise security
- Listed company since 1999 (NASDAQ OMX: SFTIV)
- Headquarters in Helsinki, Finland and Atlanta, US
- Operational offices in 18 countries, 4 continents
- R&D in 3 locations across Europe, Finland, France and Poland
- # 1 European based network security vendor.
- Deployments in more than 90 countries, on 5 continents
- app. 212 employees. Technology R&D 37 %
- Customer base includes 4 000 large and mid sized organizations
- Customer retention rate 95% is the highest in the industry
- Globally working with over 200 active channel partners
- Product sales growing over 50% in Q2 & Q3 /2011.



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Customer Base by Verticals



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Customer References



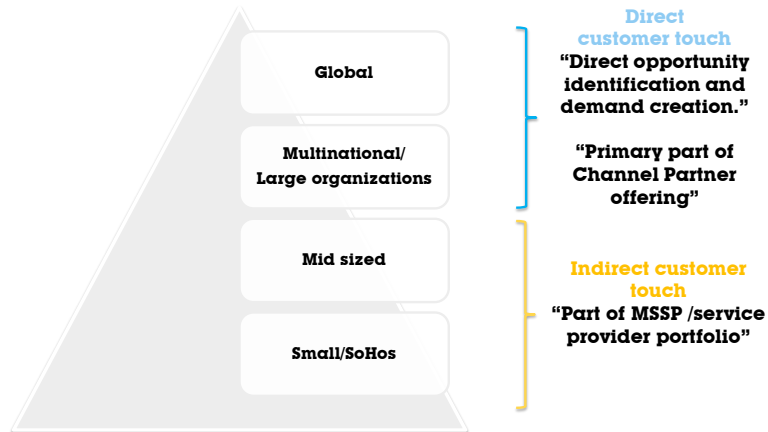
Why choose and stay with us?

- Adaptive and dynamic security
 - Adaptive to virtual, physical or hybrid infrastructure
 - They value proactive and dynamic security
- Low TCO
 - They look for low Operational Expenditure/TCO
 - One contract, zero concern and future included
- We hear customers voice
 - We listen to our customers and develop solutions that solve their real challenges
 - Highest retention rate in the industry
- Management
 - Stay secured cost efficiently, easily, fast and error safely
 - Ultimate management experience
 - High context/situation awareness



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Stonesoft GTM Model



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Product / Technology Excellence

Sourcefire IBM/ISS HP/TP Sophos WatchGuard SonicWALL Paloalto
McAfee Juniper Fortinet Cisco Checkpoint Stonesoft



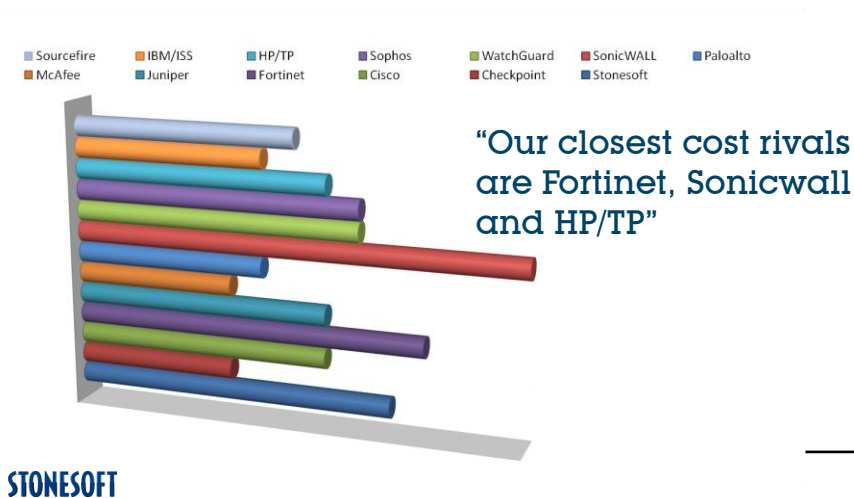
"Our closest Product/Technology rivals are Checkpoint, Fortinet and Sourcefire"

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Customer Excellence



Cost/operational excellence



Technology partnerships



Security collaboration



Solution partners



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PROVEN TO BE GOOD... Certifications



Validating the strengths of the Stonesoft security solutions.

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INDUSTRY SHIFTING NEXT GEAR...

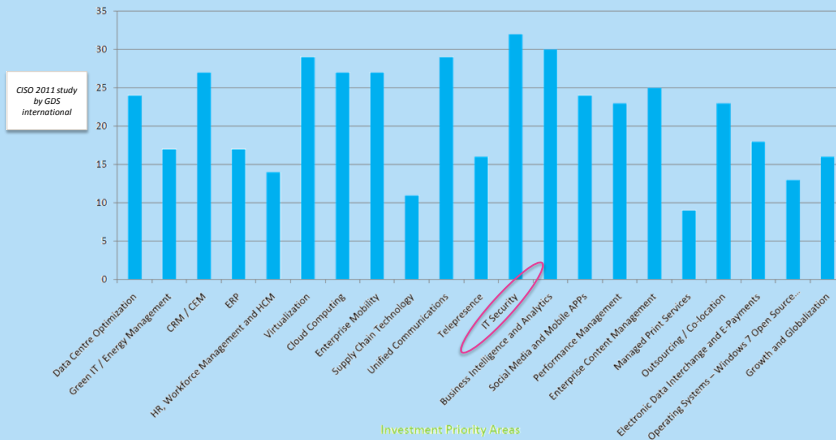
Industry Growth Drivers

- Top management view:
 - Security risk = business risk
- C-level and board interest increasing
- Cloud computing, Virtualization and Consumerization include security risks
- Raise of advanced cyber criminality
- Cyber Security budgets increasing
- High profile hacks add visibility and interest
- Room for new security technology innovations

**Security
paradigm is
shifting fast –
So is business
outlook.**

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Security is priority # 1.



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Industry trends.

R&D Innovation.

Own primary research work and security innovations become key success criteria.

Dynamic security.

Dynamic / software based technology will win.

Consolidation

More consolidation will happen.

From point to managed security

Era of isolated and standalone security is ending. Situation awareness and manageability become priority #1.

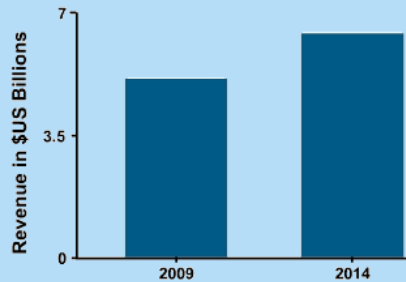
Security As A Service

Security becomes more an OPEX than CAPEX issue.

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By 2014. It will be 6.4 billion USD market.

**Network Security Appliances and Software
Worldwide Revenue Forecast**



© Infonetics Research, Network Security Appliances and Software
Quarterly Market Share, Size, and Forecasts, Feb. 2010

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**A Growth Company.
A Future Company.**

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Our strongholds.

Customer base.

Strong and respectful customer portfolio.
Highest retention rate in the industry. >95%

Dynamic security.

We fit into future scenario of
dynamic, adaptive and easy to manage security.

R&D

Competent R&D in house,
innovative and disruptive way of developing technologies

Thought leadership

Improving footprint in media and analyst reports,
collaboration with test labs, certifiers, academics

Customer excellence

We hear customers.
Adaptive and Agile to meet customer's
changing business needs

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WE ARE A GROWTH COMPANY.

What is actually growing...?

- New product sales
- Industry
- Customer size
- Deal size
- Channel partner quality
- Face time with key decision makers in larger organizations

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WE ARE A FUTURE COMPANY

Why do we fit into future security ...?

- Dynamic security design
- Ultimate management experience
- Control and situational awareness
- Low OPEX
- Agile and adaptive
- Strong in-house R&D
- Technological integrity and compatibility
- Independence

"As I research into the future of adaptive security infrastructure, I am convinced that the future of information security lies in software, not hardware"

Neil MacDonald
VP & Gartner Fellow
15 years at Gartner
25 years IT industry

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