



Trustwave

SECURITY FOR DIGITAL TRANSFORMATION

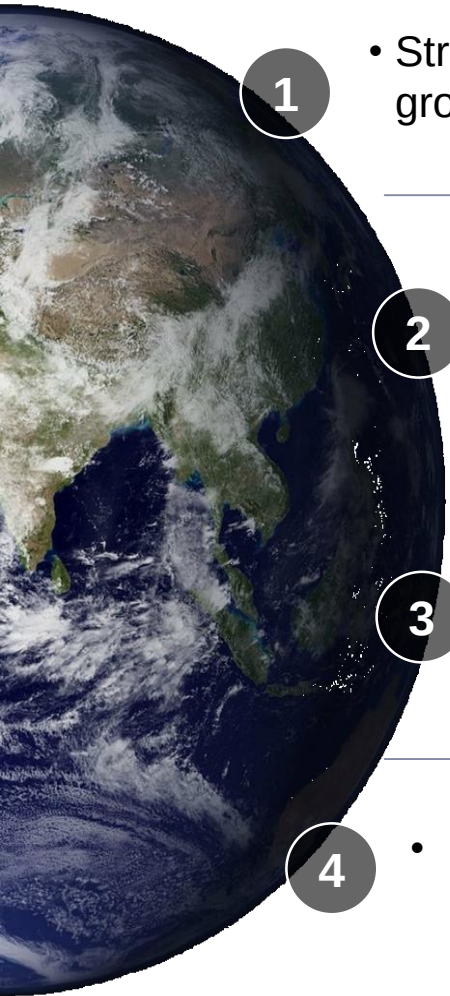
Art Wong
CEO, Trustwave

June 11, 2019

 **Trustwave**[®]
a Singtel company



Cyber Security – Big Market Opportunity, Leading Global Capabilities



1

- Strong market demand for cyber security, market opportunity of >S\$200B, growing at 9%
-

2

- Focus on high-growth and high-margin segments of the market which are growing 2x faster than the overall cyber security market
-

3

- Worldwide scale; local capabilities in all key geographies
-

4

- Well-recognized capabilities in Managed Security Services, Consulting & Professional Services and Data Protection Technology

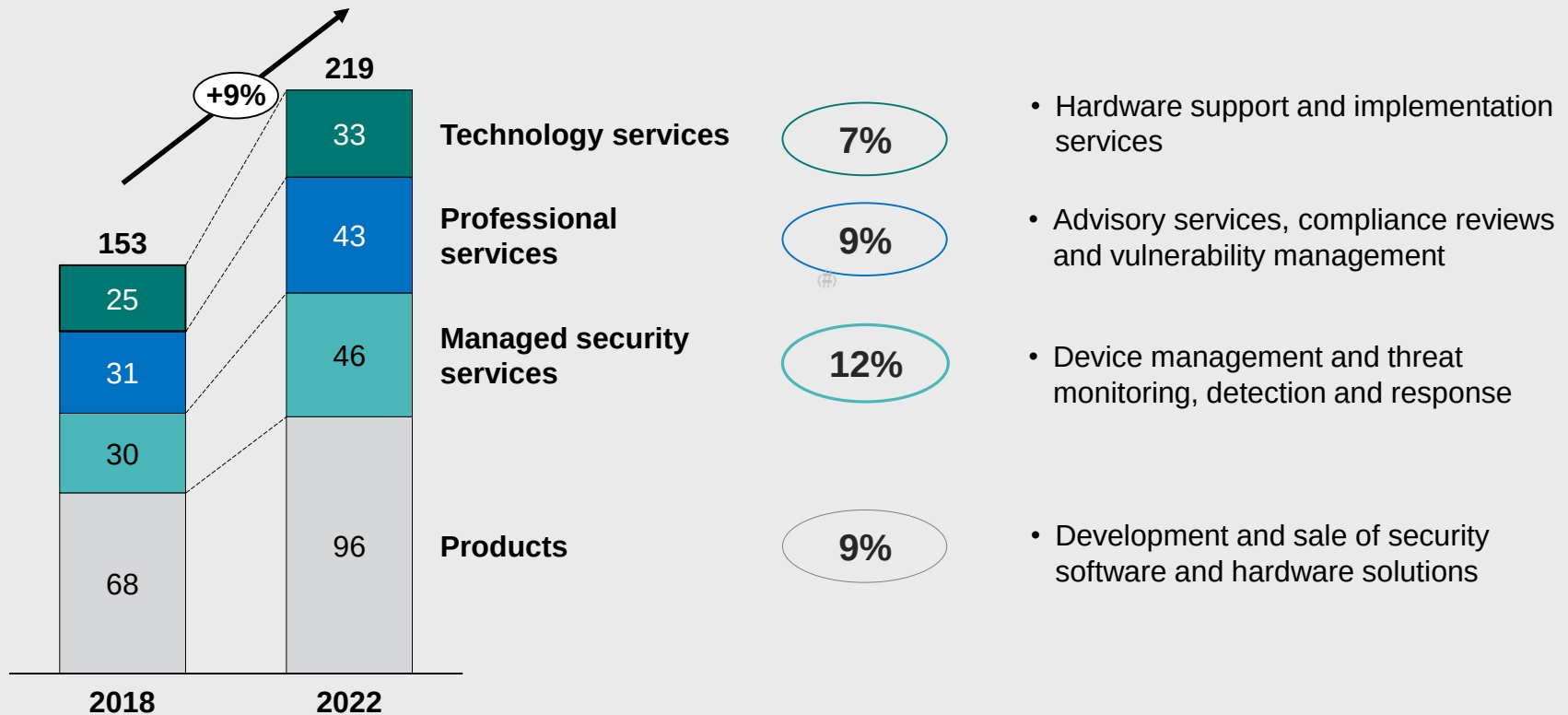


Market Opportunity of >S\$200B

Worldwide cyber security spend⁽¹⁾
(S\$B, 2018-22)

CAGR
(%, 2018-22)

Description



(1) Source: Gartner Forecast Analysis: Information Security and Risk Management, Worldwide, 4Q18, Rustam Malik et al., 29 March 2019

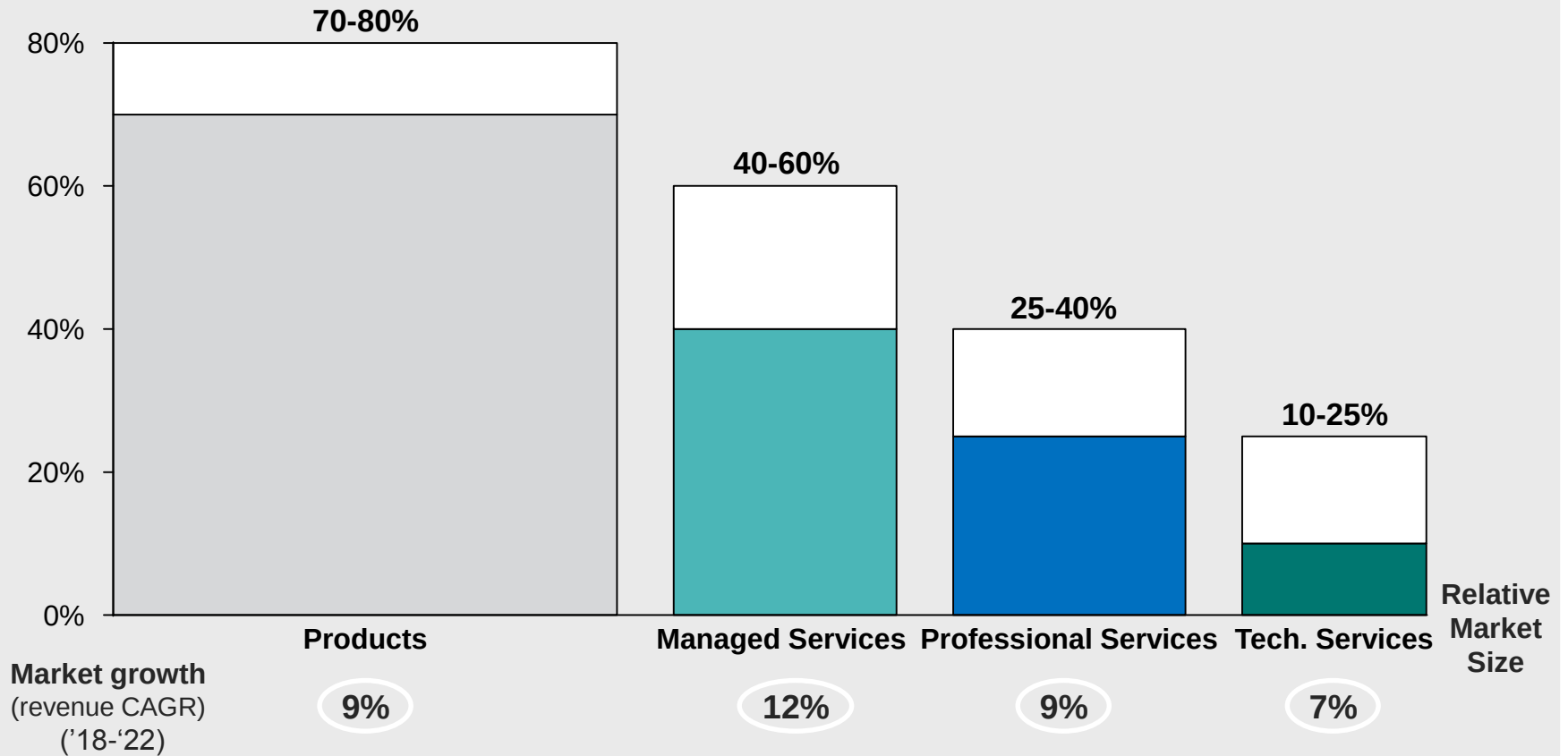
Values are in constant-currency, an exchange rate of 1.304 SGD per USD was applied; Graphs/Charts created by Singtel based on Gartner Research; Classification methodology of Gartner's defined sub-segments into Singtel's categories: Tech. Services comprises of Implementation Security Services, Consulting comprises of Consulting Security Services, MSS comprises of Hardware Support and IT Outsourcing Security Services, Products comprises of all remaining sub-segments;



Global IT Security Industry Profit Pools

ILLUSTRATIVE

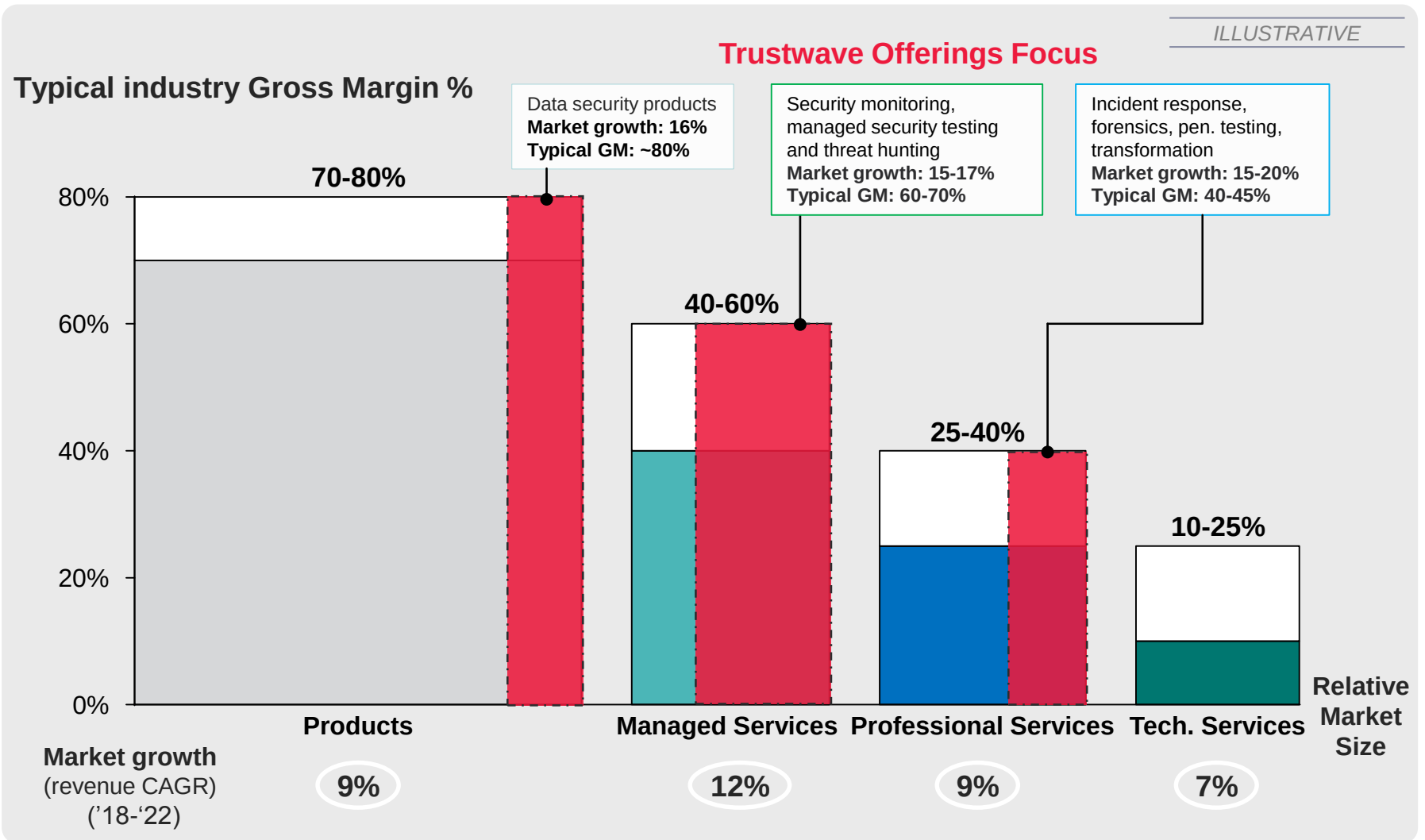
Typical industry Gross Margin %



Source: internal estimates, based on the financial profiles of publicly listed companies in each of the categories



Global IT Security Industry Profit Pools



Source: internal estimates, based on the financial profiles of publicly listed companies in each of the categories

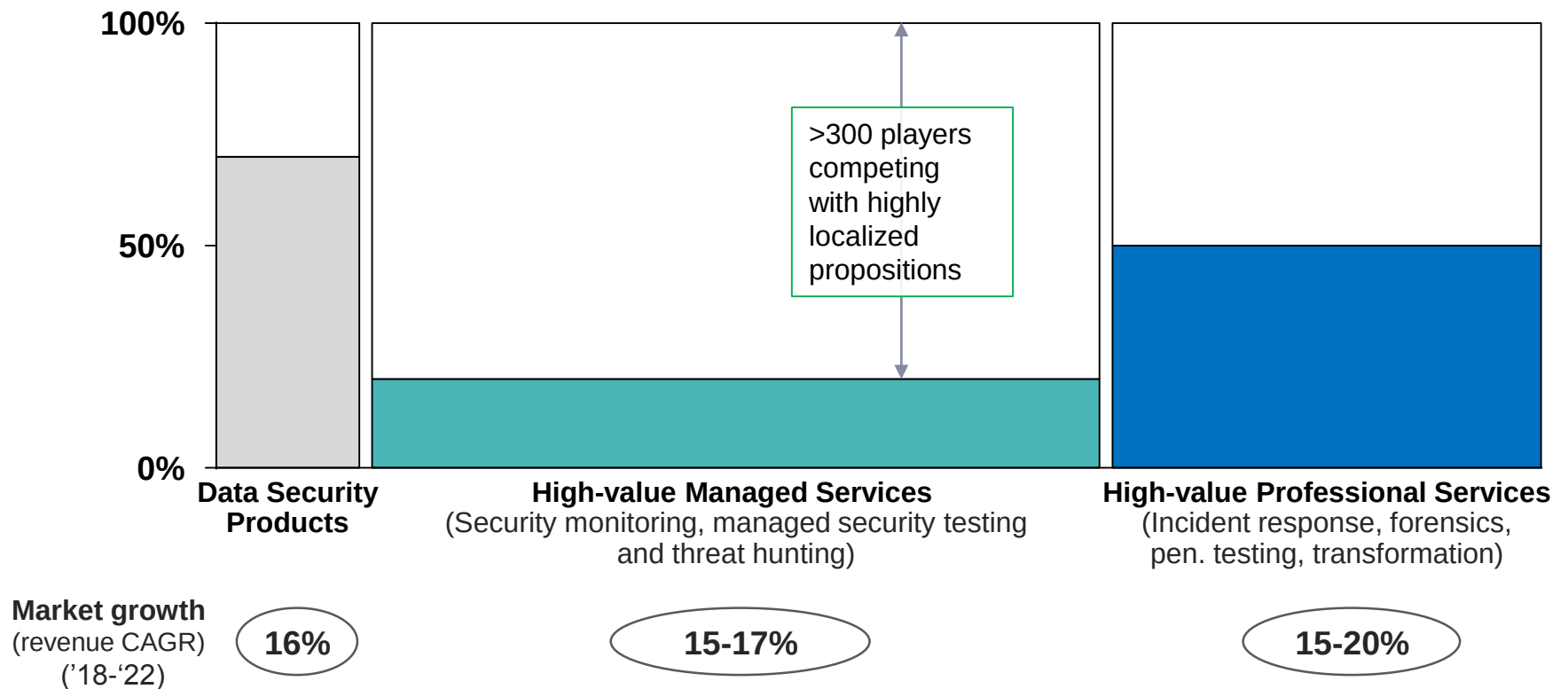


Market Fragmentation

ILLUSTRATIVE

Market share of Top-5 players

Trustwave Offerings Focus



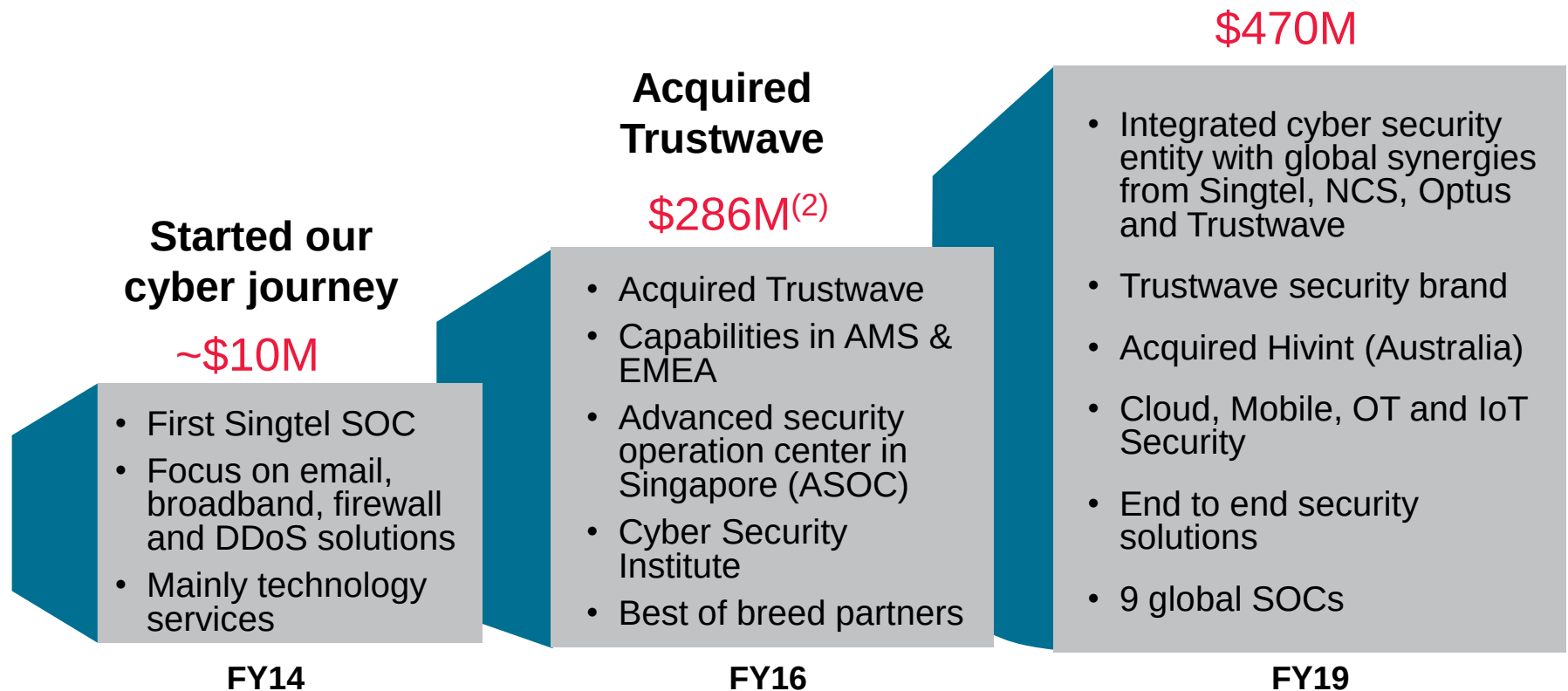
Source: internal estimates, based on the financial profiles of publicly listed companies in each of the categories



Singtel Cyber Security Growth

Cyber Security Revenue⁽¹⁾
S\$

Recognized as global cyber security and MSS leader



(1) Cyber Security revenue does not include revenue from PCI Compliance business

(2) The acquisition of Trustwave was completed on 31 August 2015. Revenue stated includes full-year contribution of Trustwave Cyber Security business (excl. PCI compliance), incl. Q1 and Q2 pre-acquisition revenue, for the purpose of like-to-like comparison with FY19



Global Visibility and Scale

Local Presence and Capabilities



200,000+

Business and
government
customers

5,000+

Enterprise
MSS clients

96 countries

Global Trustwave
customer footprint

2,000+

Security
professionals
worldwide

9

Global Security
Operations
Centers

5

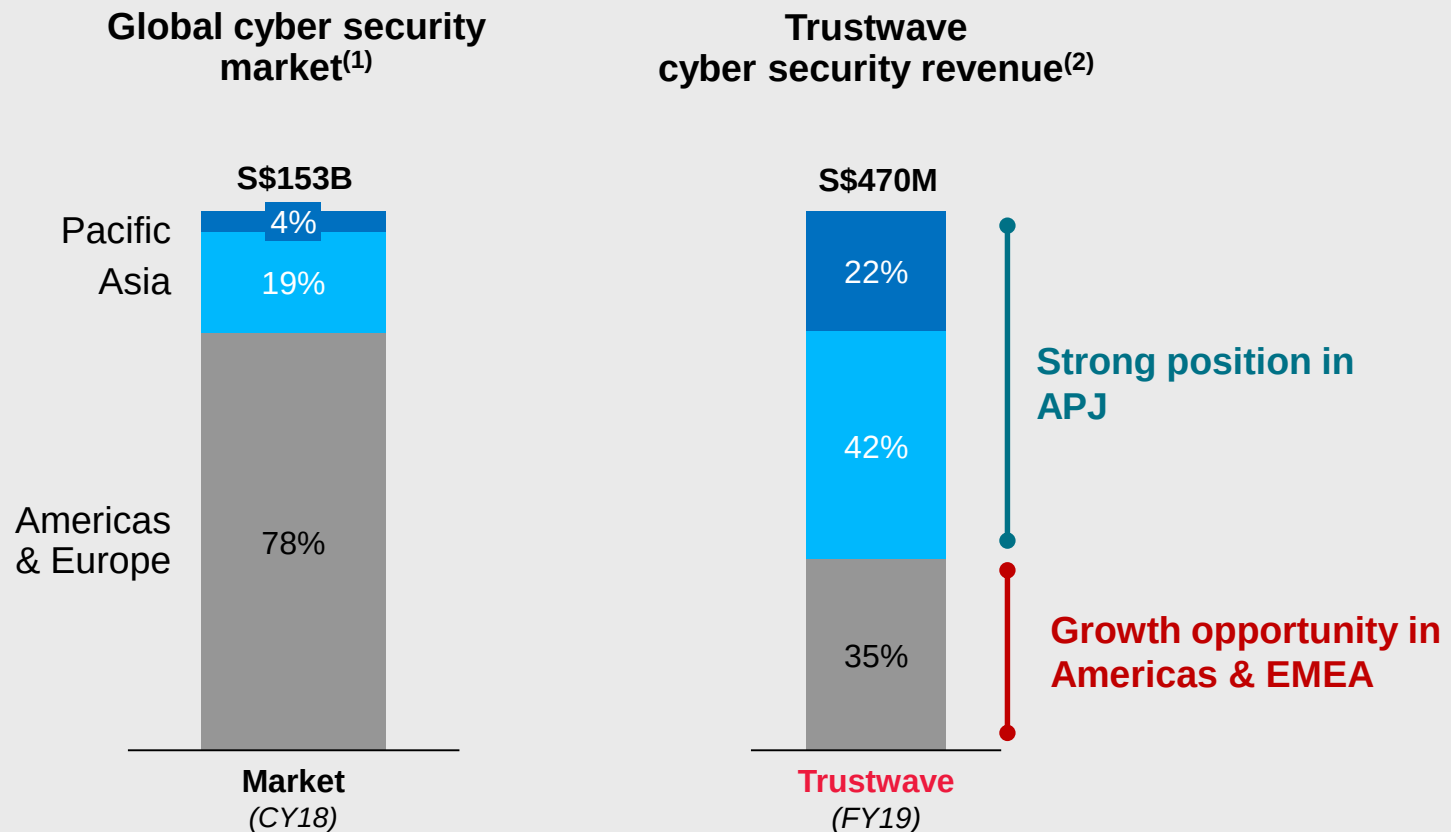
SpiderLabs
Research
Centers

1

Trustwave
Fusion Center



Market and Revenue by Geography



(1): Source: Gartner Forecast Analysis: Information Security and Risk Management, Worldwide, 4Q18, Rustom Malik et al., 29 March 2019; Values are in constant-currency, an exchange rate of 1.304 SGD per USD was applied; Graphs/Charts created by Singtel based on Gartner Research, calculations performed by Singtel; (2) Exchange rates used: 1.304 SGD per USD, 0.991 SGD per AUD, cyber security revenue does not include revenue from PCI Compliance business



Today's Security Challenges

Sophisticated threat actors

\$8T

cost of cybercrime to global business by 2020

1,425%

ROI for exploit kits and ransomware schemes

55 days

median time between intrusion and detection

Cybersecurity skills gap

3.5M

estimated number of unfilled cybersecurity jobs worldwide by 2021

53%

respondents who said their organization had a shortage of cybersecurity skills

350,000

open cybersecurity positions in the United States

Attackers target data

3B

number of accounts with personal information compromised in Yahoo breach

500M

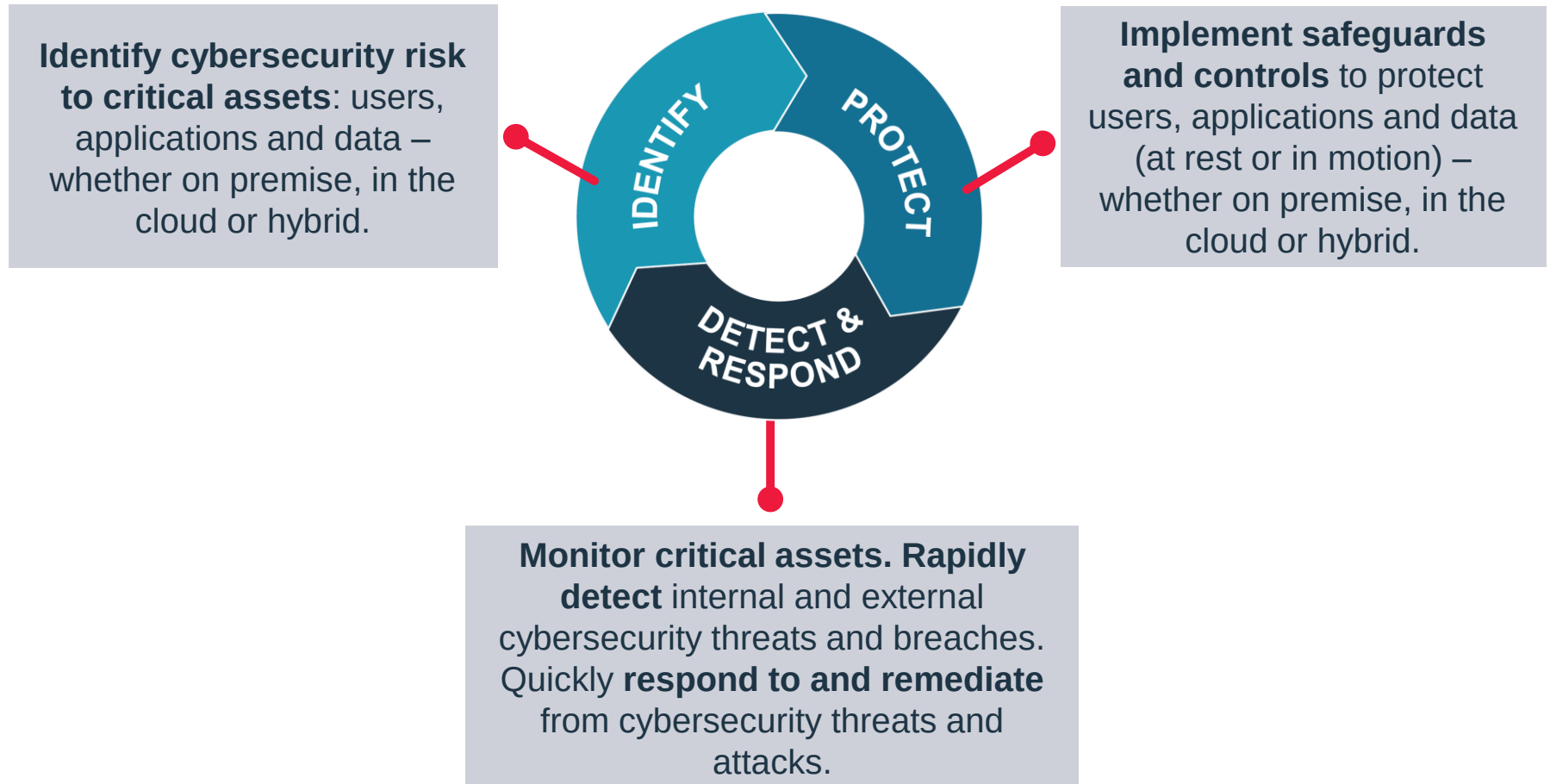
guest records compromised in Starwood database breach

21.5M

data records lost after attackers targeted databases in U.S. Office of Personnel Management

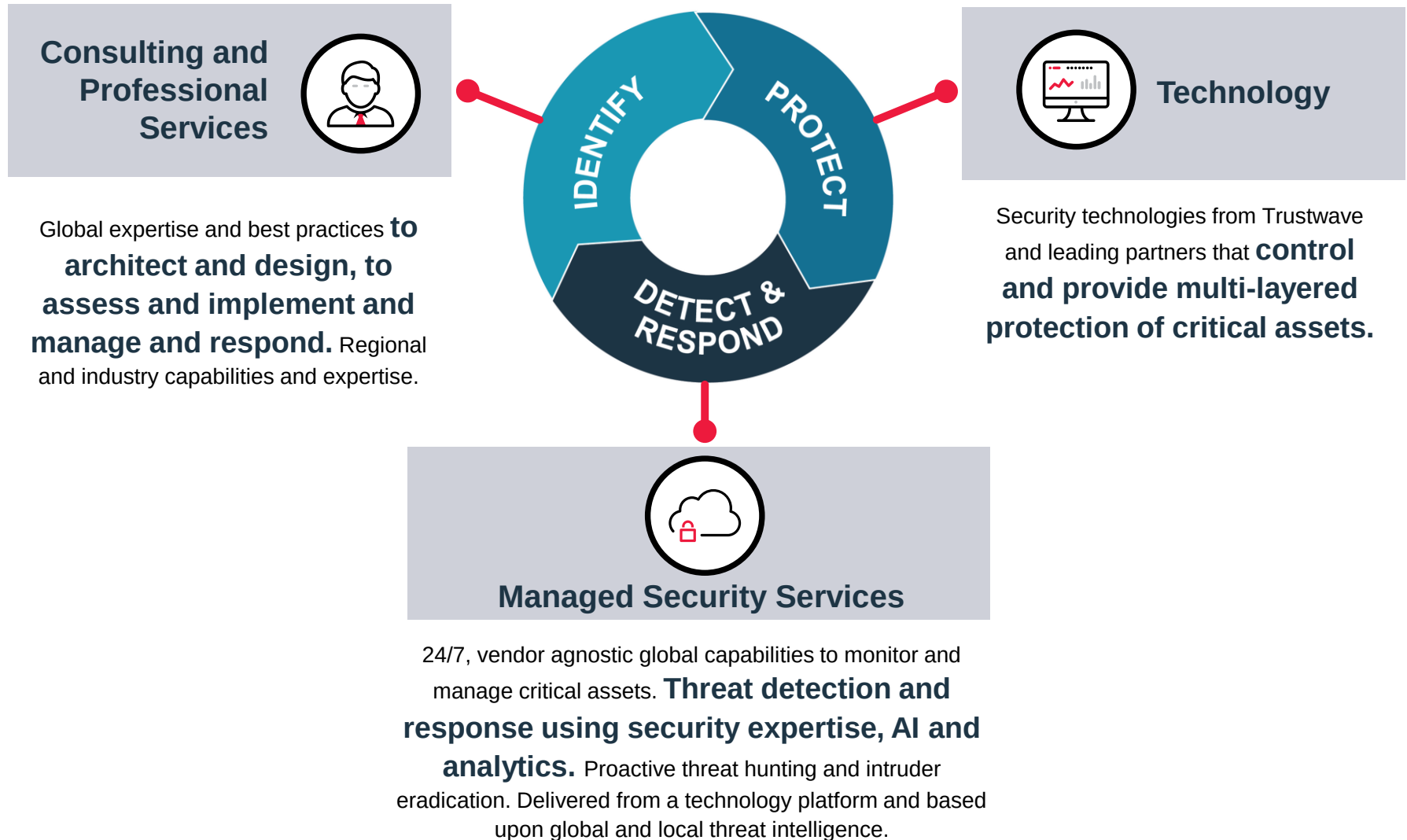


Build a Comprehensive Security Model





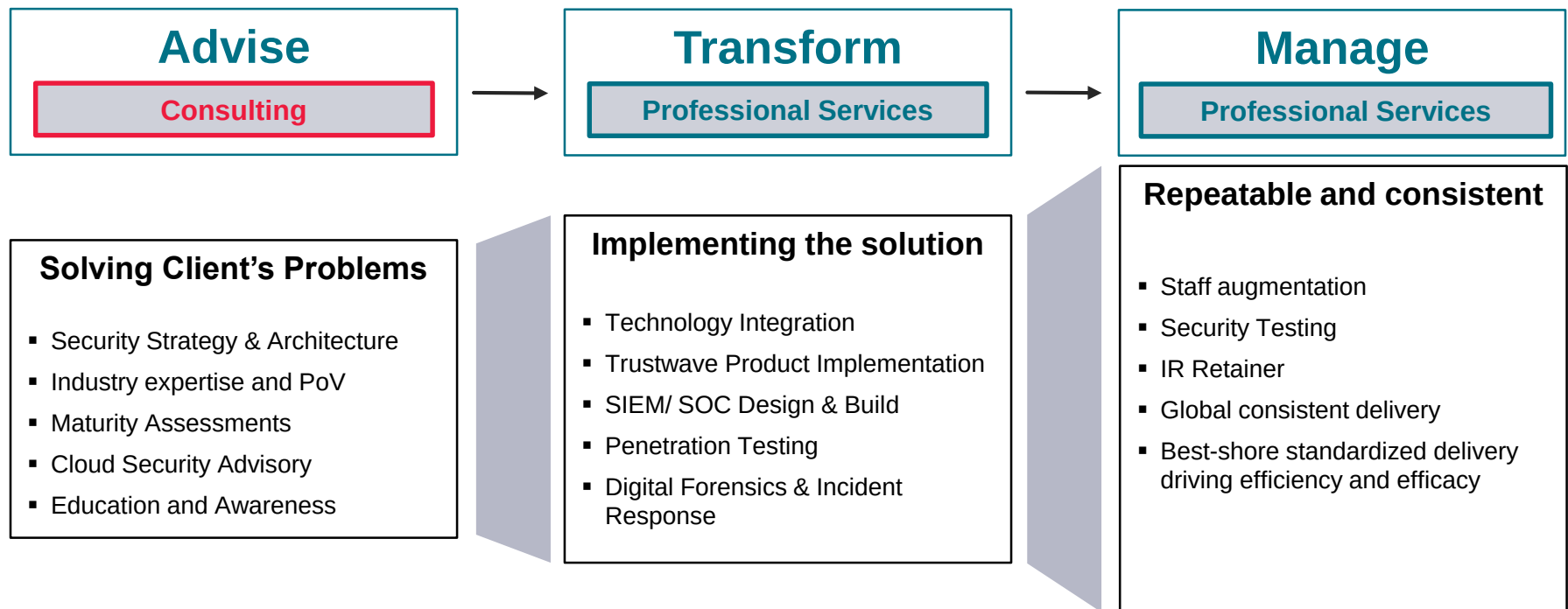
Build a Comprehensive Security Model





Global Consulting and Professional Services

Trustwave Consulting and Professional Services drive cybersecurity across the complete lifecycle

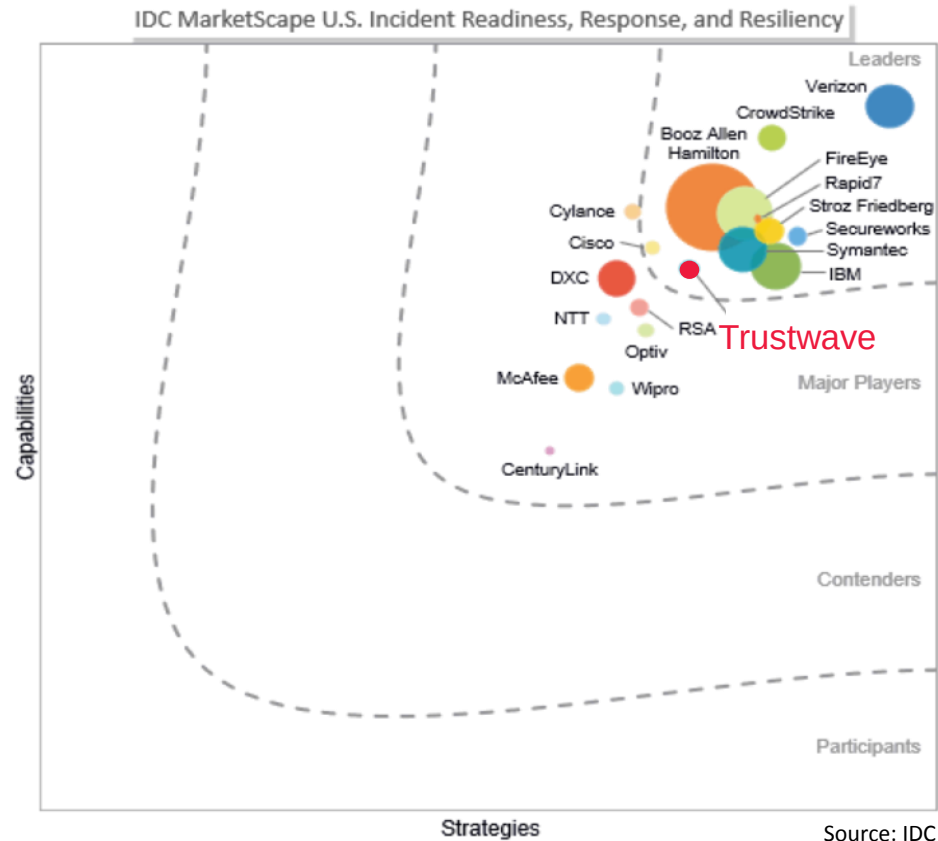




Industry-Leading Consulting & Professional Services

Trustwave: An IDC MarketScape Leader

Vendor Assessment



2018 IDC MarketScape U.S. Incident Readiness, Response, and Resiliency Vendor Assessment

Source: IDC MarketScape: U.S. Incident Readiness, Response, and Resiliency Services 2019 Vendor Assessment – Beyond the Big 5 Consultancies, #US44257117, September 2018



Protect Your Data



Trustwave DbProtect

Highly scalable database security platform that **enables organizations to secure their relational databases and big data stores, both on premises and in the cloud**, with a distributed architecture and enterprise-level analytics.

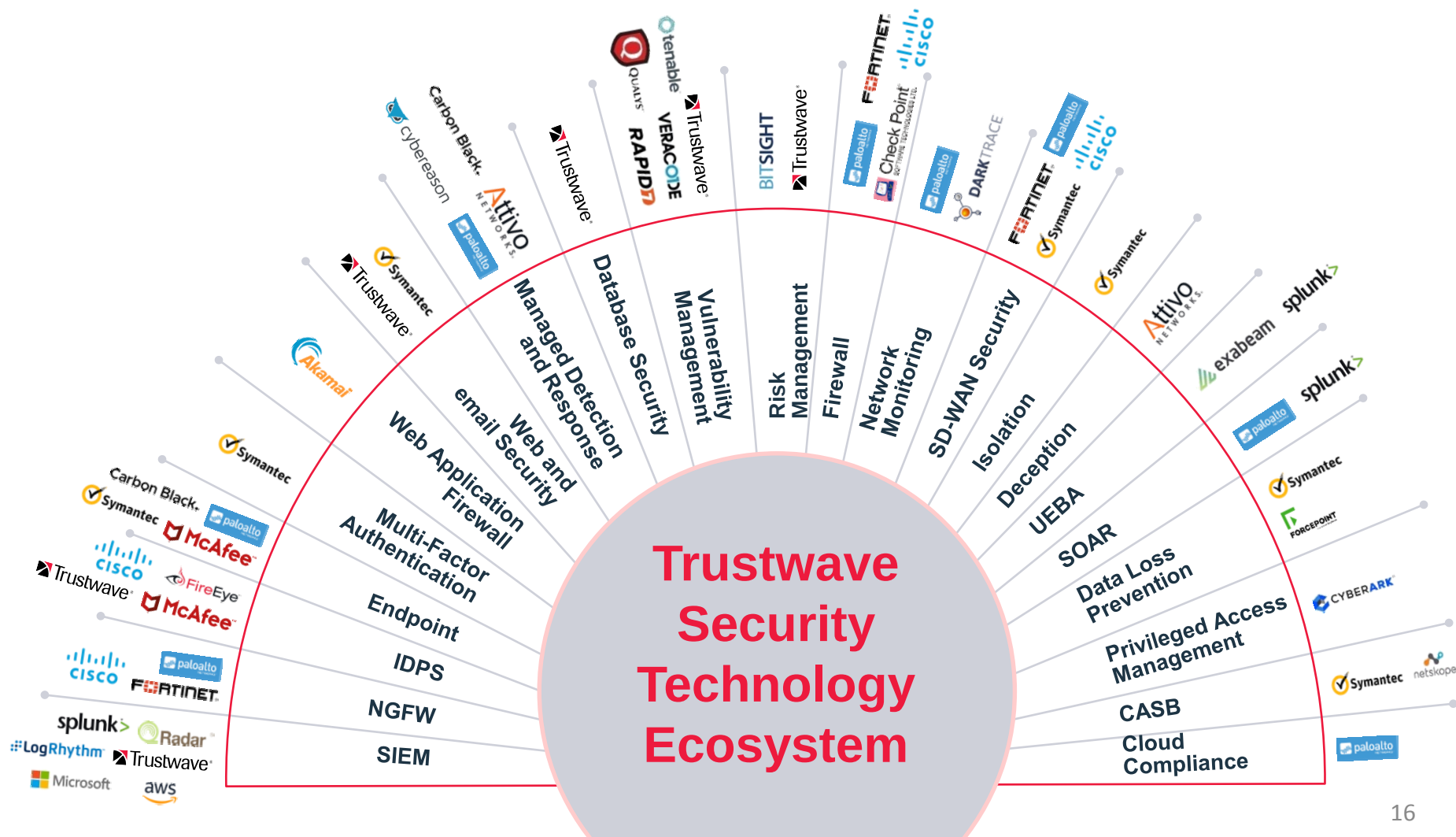


Trustwave Secure Email Gateway (SEG)

Delivers **a single email gateway solution that provides advanced protection against today's email-based threats**, extensive policy controls, and in-depth data security and compliance management.

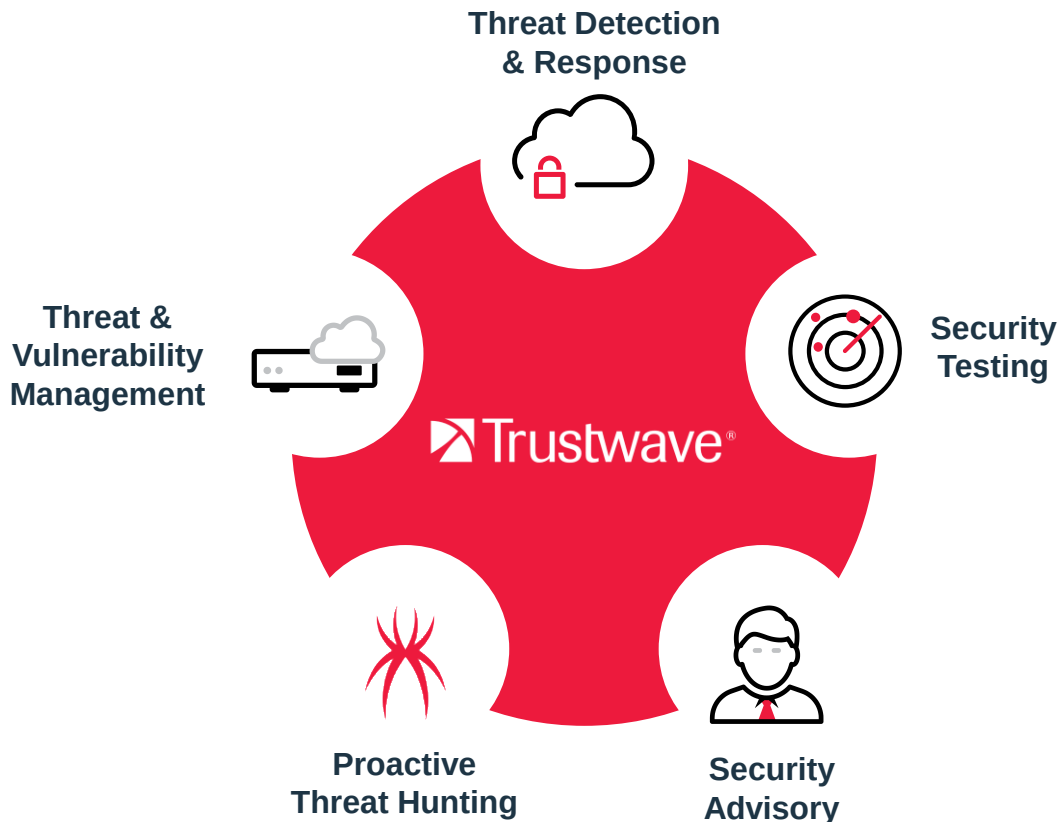


Protect Critical Assets with Technology Solutions





Trustwave Next-Gen Managed Security Services



Today's sophisticated threats require next-generation managed security services.

Trustwave offers a comprehensive portfolio of managed security services: threat detection and response, security testing, security advisory, proactive threat hunting and threat and vulnerability management.

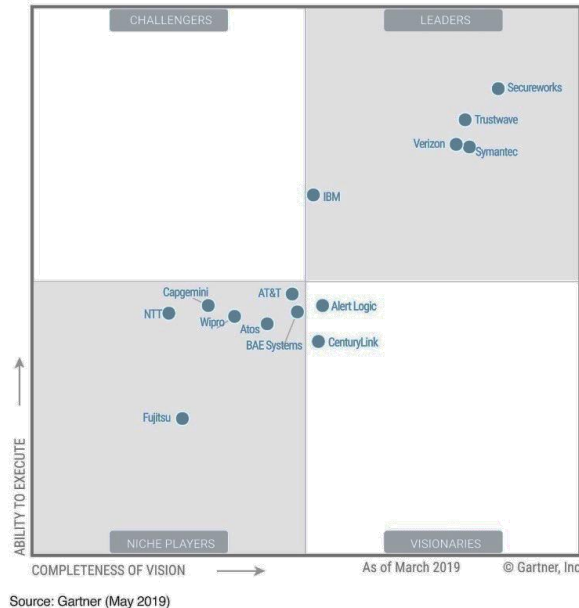
Security operations in multiple form factors:

- MSS as a full service
- Customer premise SOC
- Hybrid SOC



Industry-Leading Managed Security Services

Figure 1. Magic Quadrant for Managed Security Services, Worldwide



2019 Winner

Best Managed Security Services Provider



2018 Singapore and Southeast Asia

Managed Security Service Provider of the Year

FROST & SULLIVAN

2019 - A Leader

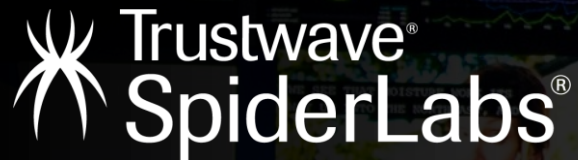
Magic Quadrant - Managed Security Services, Worldwide

Gartner

Gartner, Magic Quadrant for Managed Security Services, Worldwide, Toby Bussa et al., 02 May 2019. This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from Trustwave.

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Deep Expertise

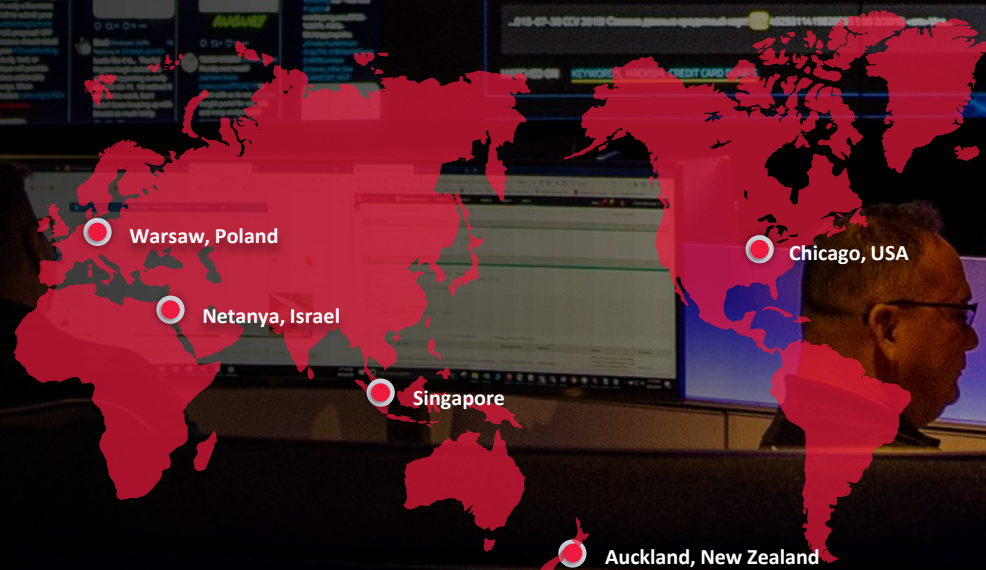
Threat hunting, ethical hacking, forensic investigations, incident response and research

Unrivalled Intelligence

Real world intelligence from forensics investigations and advanced threat research

Globally Recognized

Recognized globally by enterprises, cybersecurity analysts and research community



SpiderLabs Research Centers



Our Journey Forward

