



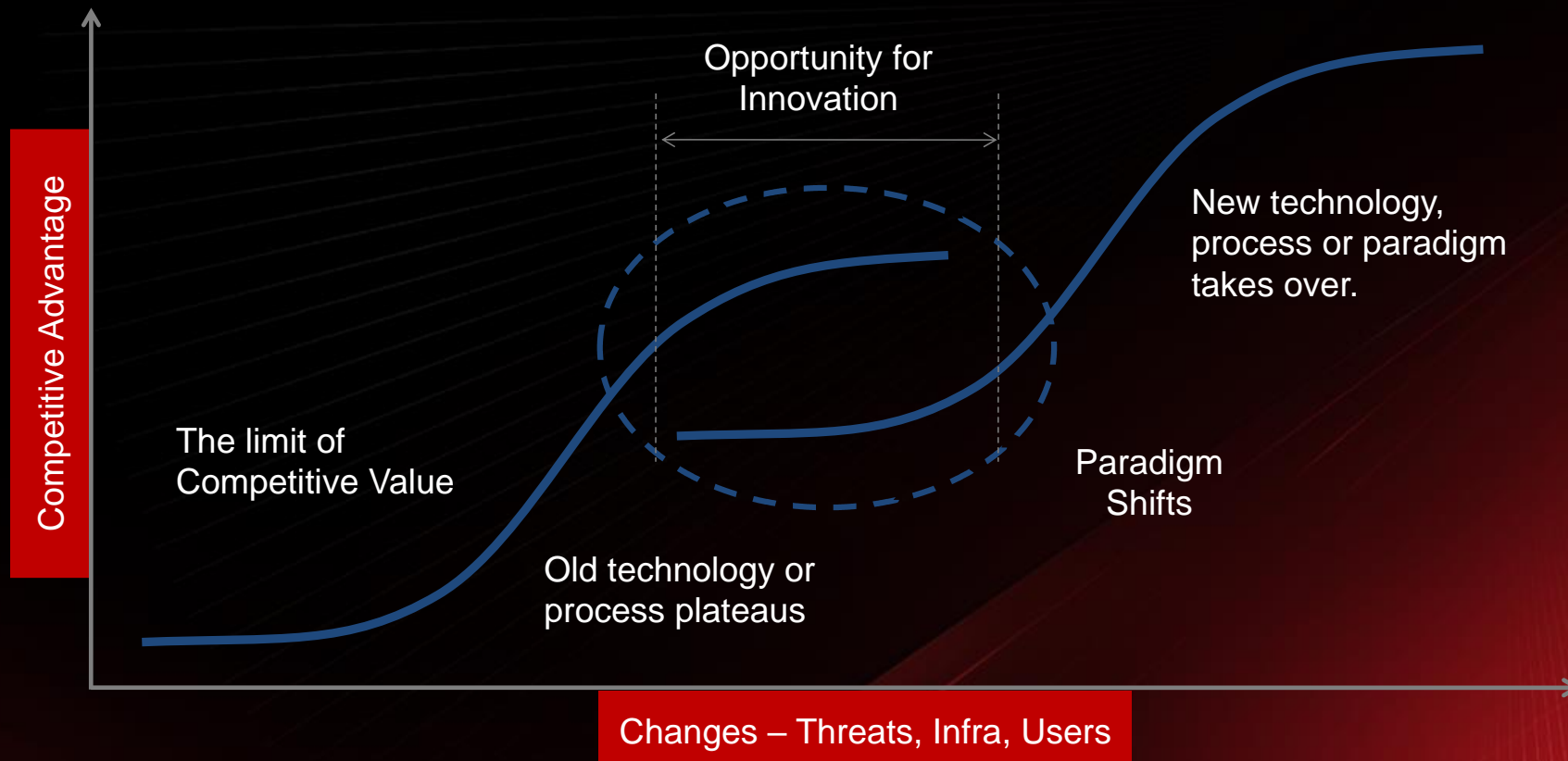
Trend Micro A Platform Company

Eva Chen | 2022 Q4 IR



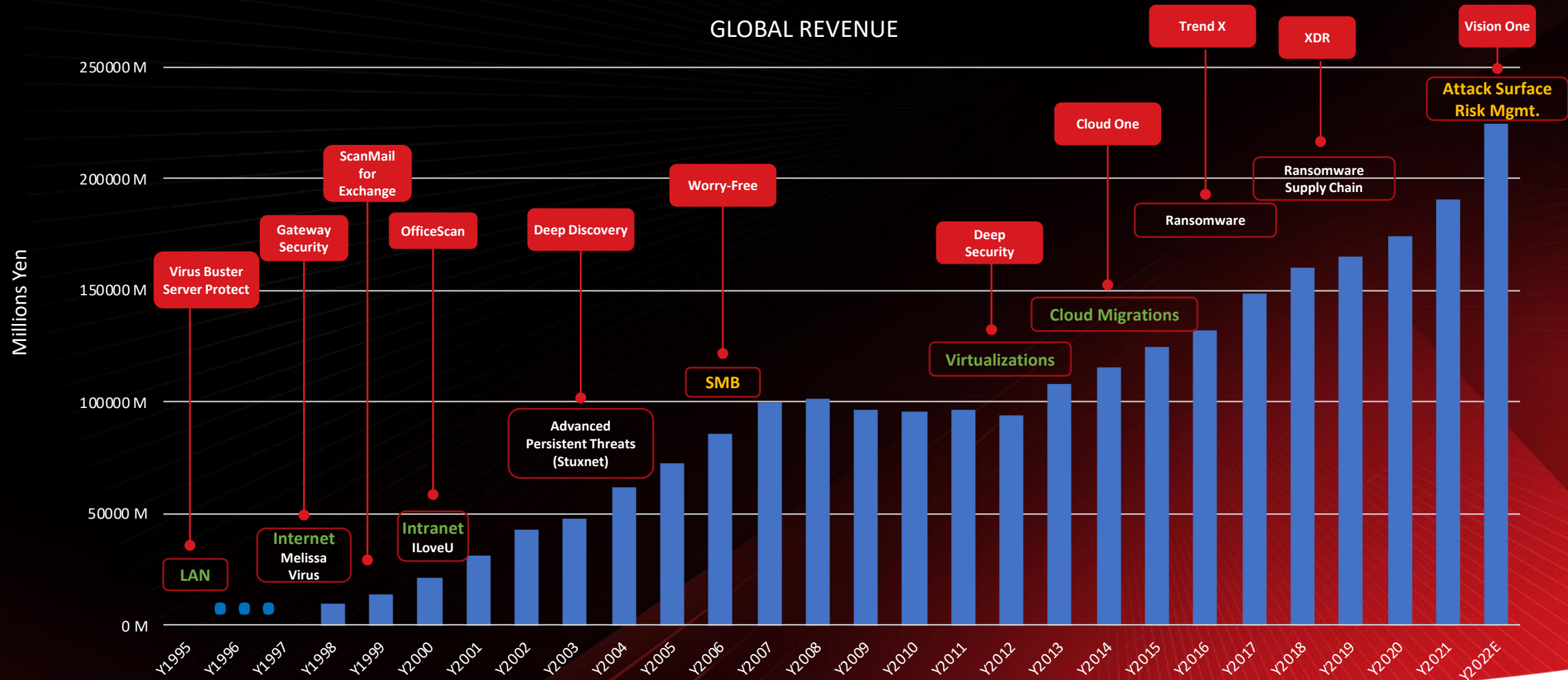
How Cyber Security Grows

- Growth and innovations driving by CHANGES in Threats & Infrastructures



- Technology sunsets/fades and replaced by new approaches.
- We pioneer new technologies to intercept changes.

Sustained Growth & Innovation



Today's Changes: Customer Change

Growth in Connected Devices



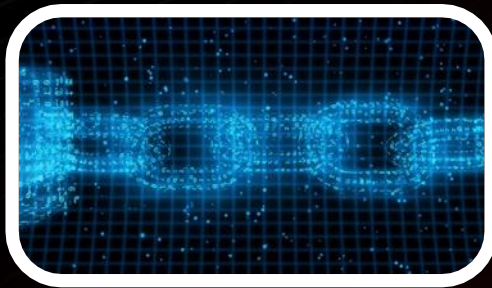
14.4B connected devices in 2022; cyber assets has proliferated, driving up **attack surfaces & risks**

Need For Higher ROI



Economic challenges driving the need for **vendor consolidation** and higher ROI

Supply Chain Risks



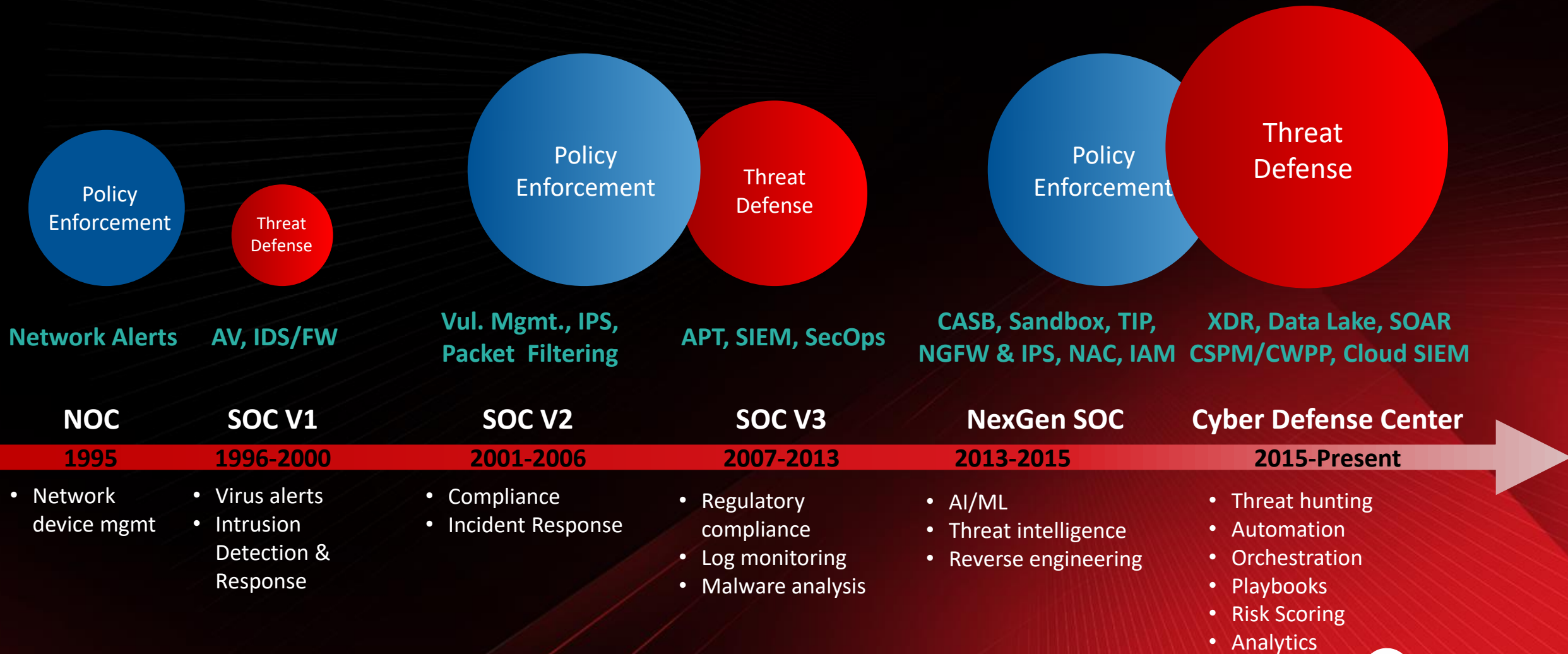
Third-party suppliers and software **supply chain attacks** are on the rise

Global Skills Shortage



Over 2.7M **unfilled cybersecurity jobs** combined with retention difficulties

SOC Technology Stack & Role Evolution



- Network device mgmt

- Virus alerts
- Intrusion Detection & Response

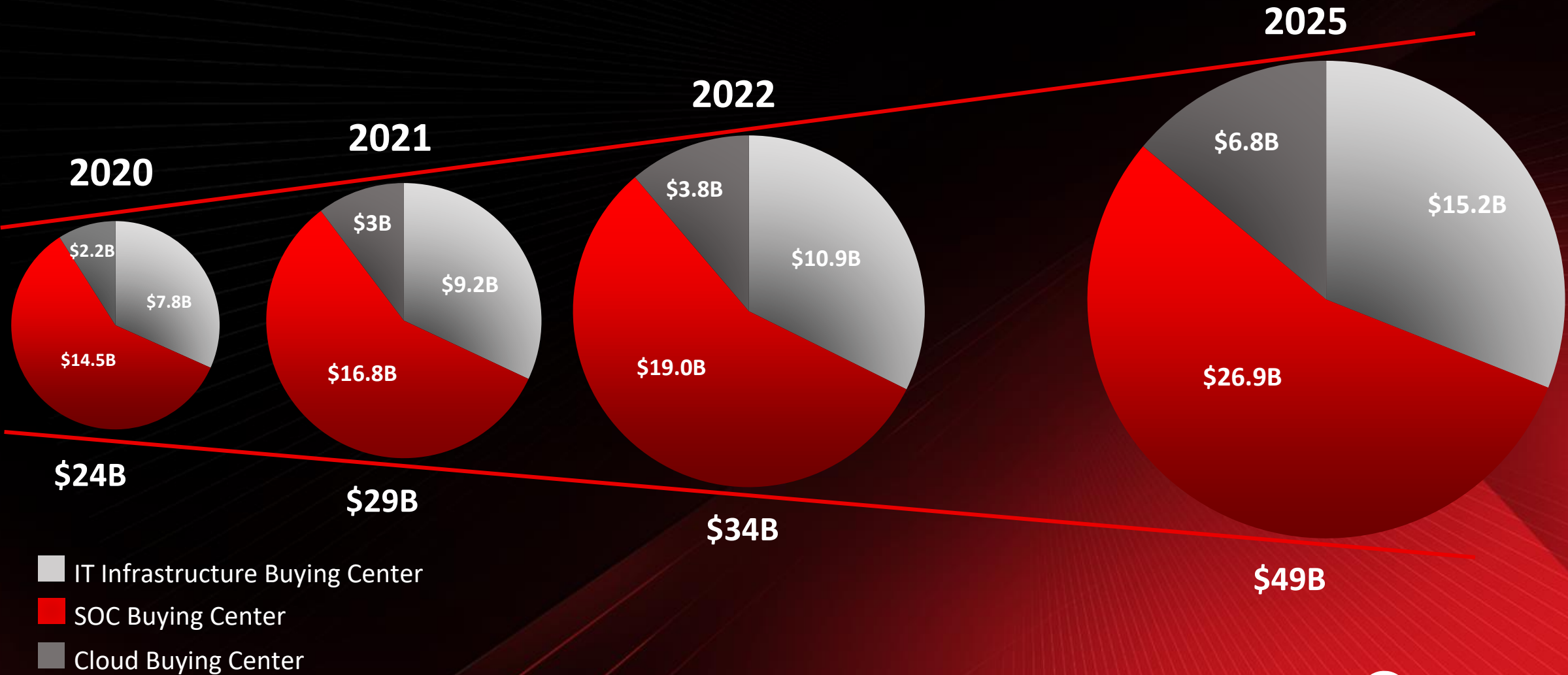
- Compliance
- Incident Response

- Regulatory compliance
- Log monitoring
- Malware analysis

- AI/ML
- Threat intelligence
- Reverse engineering

- Threat hunting
- Automation
- Orchestration
- Playbooks
- Risk Scoring
- Analytics

Total Addressable Market



Source: IDC Worldwide Corporate Endpoint Security Market Shares, 2021, *Worldwide Cybersecurity AIRO and Tier 2 SOC Analytics Forecast, 2021-2025, IDC, Craig Robinson Security Services, Forecast: Information Security and Risk Management, Worldwide, 2020-2026, 2Q22 Update, Gartner.



SOC & CISO Challenges

Attack Surfaces

Exponential growth



Digital transformation, OT/ICS, and WFH have increased attack surfaces exponentially, both internal/external and known/unknown.

Risks & Trust

Boardroom Priority



75% of the CISO reported lack of visibility in cyber assets and full understanding of cyber risks, and potential blast radius of exposed entities.

Alert Overload

Siloed Solutions



Fifty, average number of tools in a security operations center. Siloed tools and vendors slows down visibility, detection, analysis and response

Cloud Security Challenges

Cloud is complicating your attack surface



With the adoption of cloud resources, such as cloud instances, containers, serverless, an enterprise is exposed to more security risks than ever.

Addressing security in runtime is expensive



It costs 60 to 100 times more to fix a security issue in runtime than in build time.

Security & development are two separate teams



Security and development have different goals and objectives. Security should be delivered to them in the fashion that makes sense to their work.

Seamlessly, integrate security into your DevOps

Pre-Runtime Protection



Runtime Protection



Developer IDE

Empower developers to find and fix security flaws as they are created in their toolchain



Build Pipeline

Discover and resolve security issues in infrastructure templates and container images



Runtime Posture

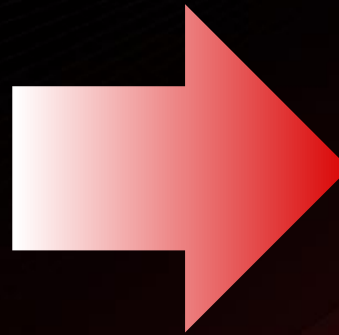
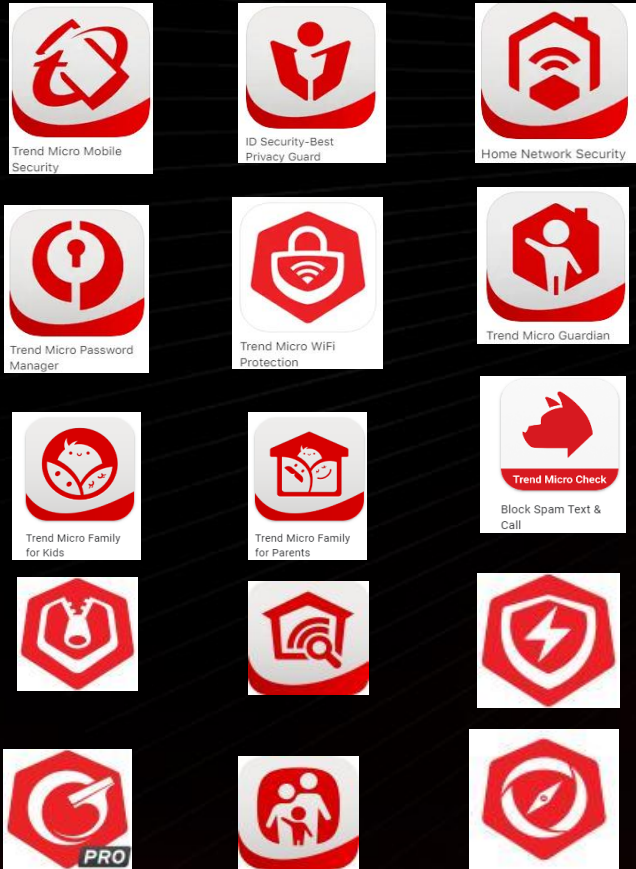
Discover and assess assets across complete application lifecycle at runtime



Runtime Protection

Detect and block file and network-based attacks across compute, storage, and network resources

Pivoting to Consumer Platform



Family
Smart Home
Identity
Device

Modular, Flexible,
Simplified, Synchronized

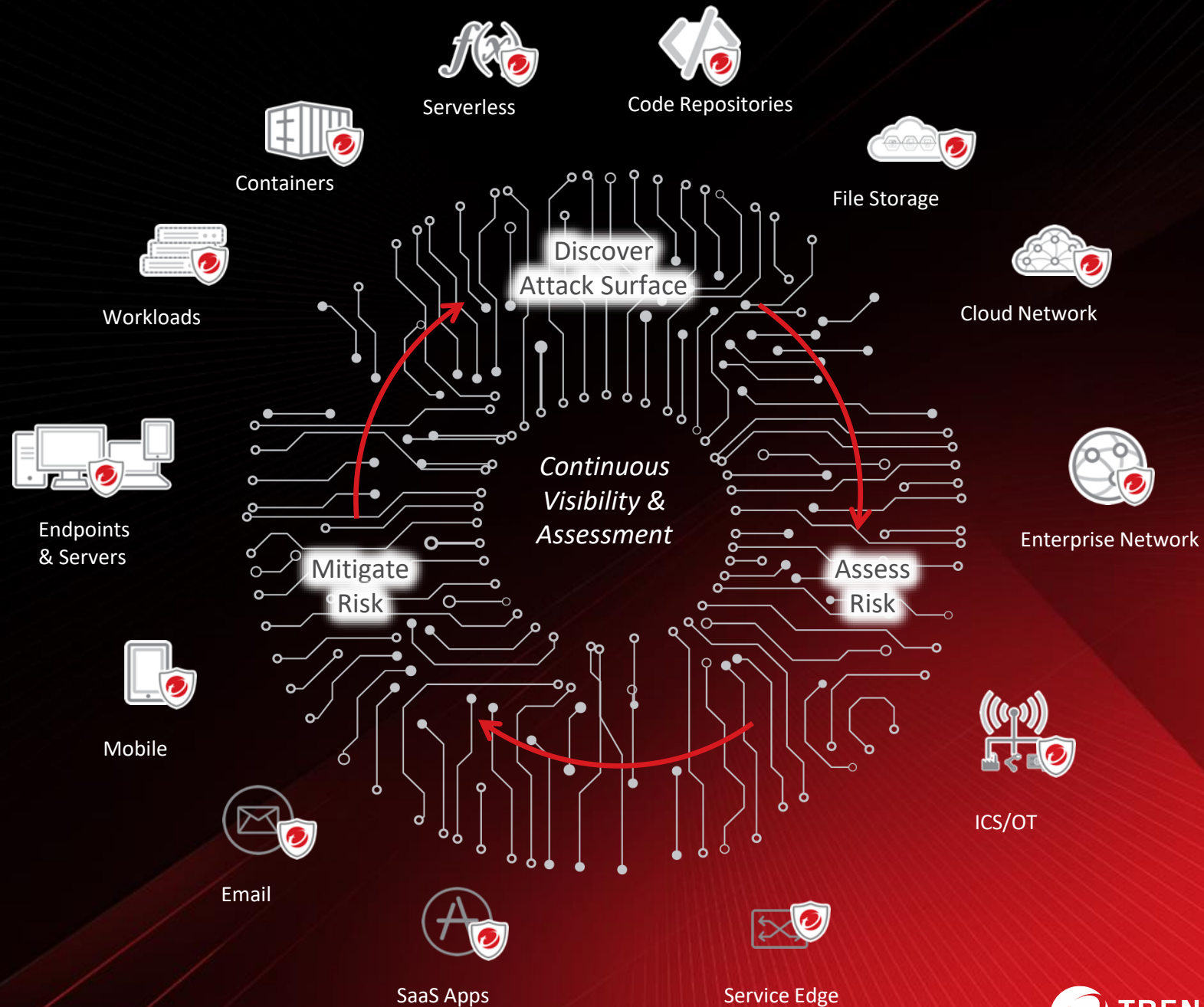
Easy Onboarding, Flexible
Subscription, Partner Integration

Device and Identity Protection
Support Services

Trigger Pilot Program – Life Stages and Events

Life Phase	Self	Marriage	Buy a Home	Start a Family	Children leave home
	Independent adult	Merging of lives	More devices to protect (Smart Home)	Protect kids from inappropriate content	Transition to independence
What's at risk?	Own basic devices (laptop, smart phone)	More devices, two identities to monitor instead of one.	Security cameras, smart lighting, smart thermostats, etc	Even more devices to manage, filtering for inappropriate content. More online accounts. More worries about identity theft	Managing their own devices and identity for the first time. Maybe some smart devices like smart tvs or game consoles
How Trend can help	Device Protection, Identity Protection	Additional Device Protection, Additional Identity Protection	Smart Home Protection	Family Safety	Device and identity protection, turn off Family Safety, fewer devices

The Attack Surface Risk Management Lifecycle



Attack Surface Risk Management Difference

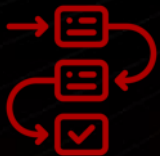
SOC Users | Operational Efficiency



Broad & continuous visibility across org's attack surface



Proactively mitigate high priority gaps



Automated risk mitigation workflow

CISO | Cyber Risk Mgmt.



Overall cyber risk posture insight for boardroom discussions

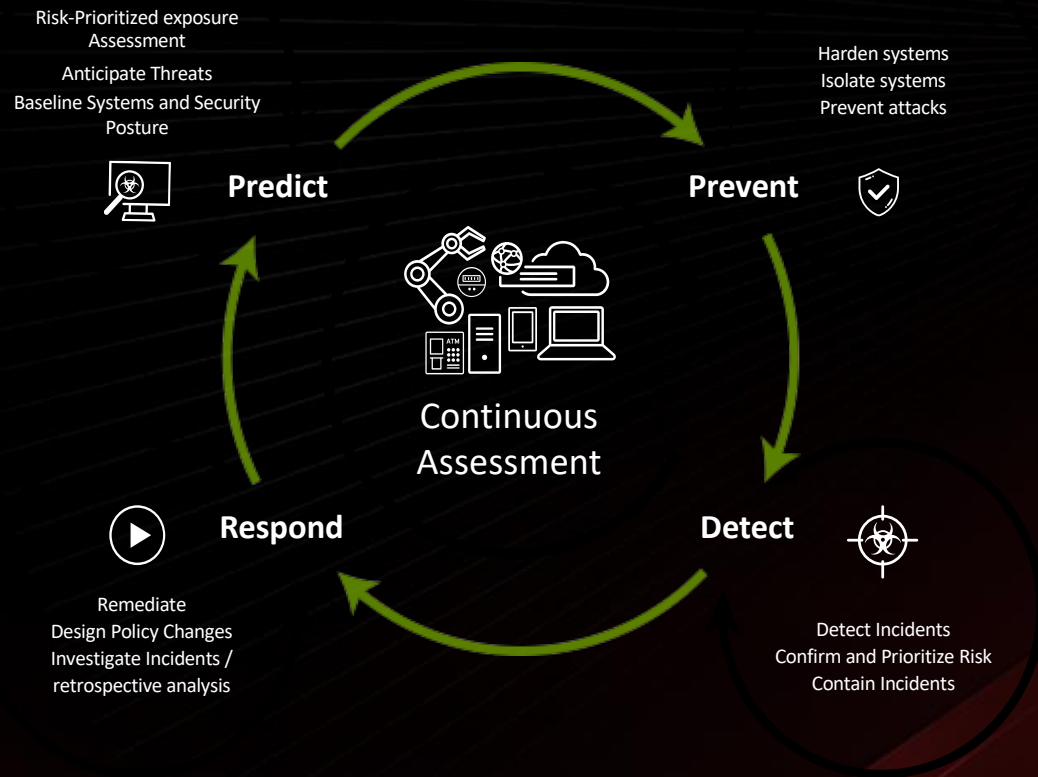


Prioritization of security investments



Facilitate risk decisions with business leaders

Beyond Threat Defense: *PREDICT & ANTICIPATE*



- Pivot from “protect & prevent” to “detect & respond”.

We’re Helping Customers:
PREDICT & ANTICIPATE

Managed Services

Ecosystem Integration

Attack Surface Risk Management

Discover Attack Surface • Assess Risk • Mitigate Risk



Zero Trust Architecture

User & Identity	Endpoints & Servers	Email	Cloud Infra	Applications	Code Repo	Data	Network	5G	ICS/OT

IT Infra Operations

Endpoint & Email Security	Network Security
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SOC Operations

XDR	ASM
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Cloud Operations

CNAPP	Hybrid Cloud Security
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Core Services

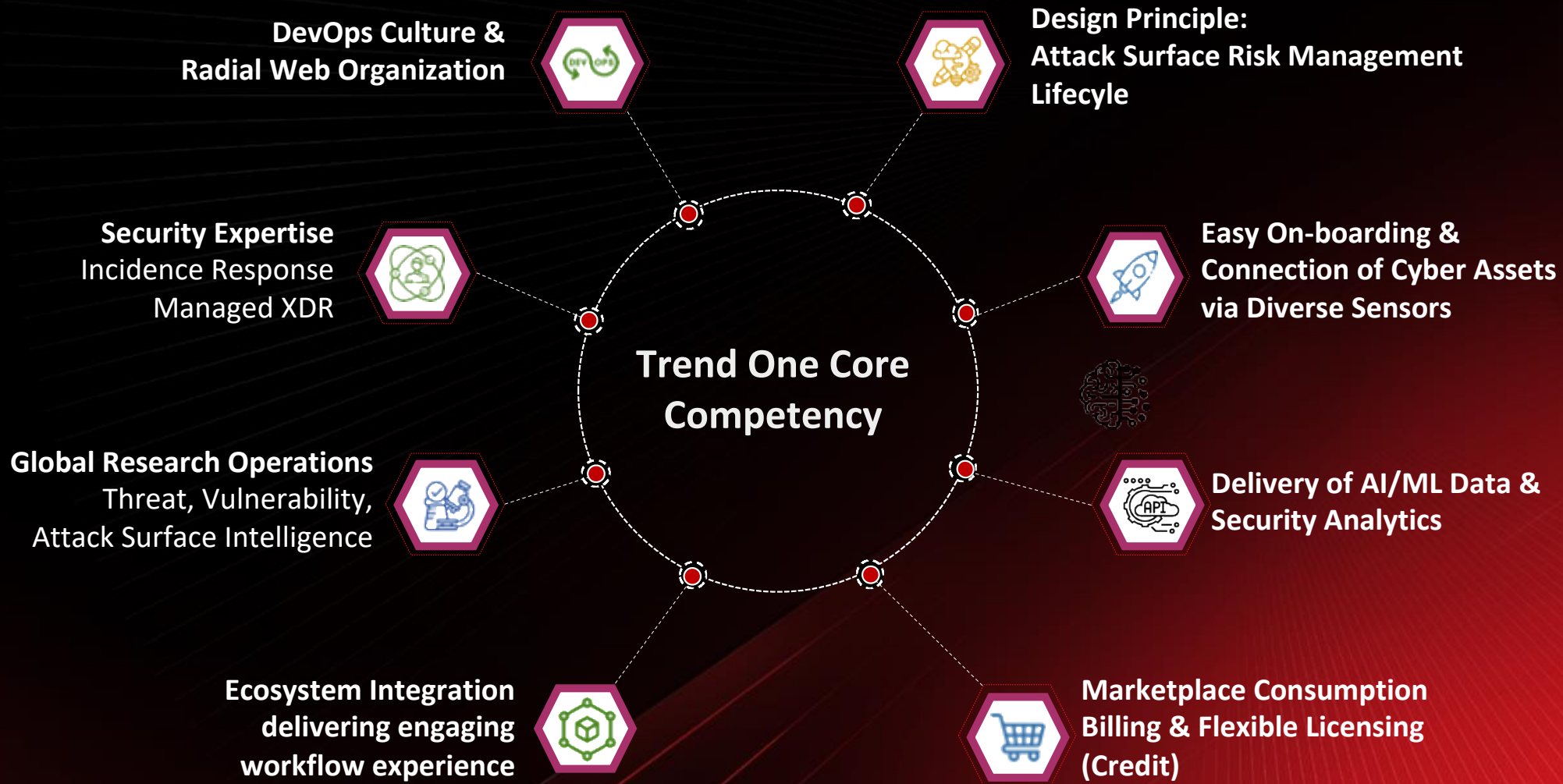
Security Engines | Open API | AI/ML | Big Data Analytics

Global Threat Intelligence

Attack Surface Intelligence | Zero Day Initiative | Threat Research



Trend One Competencies



Security That Fits



SOC, IT & Cloud Personas **2021**



Cloud One for Cloud Infra **2012**



Smart Protection Network **2008**



Customer Segmentation **2005**



VSAPI Engine **1992**

A Platform Company: Scalable & Customizable

Account-based
Activation

Trend Credits

Hybrid Management

Software-as-a-Service

Regional Data Centers

License Keys
Product Purchases
Siloed Consoles
Perpetual
On-premise



2023 Key Investments

1. Product Development:

Compliance and certifications driven by data sovereignty for VLE & government, such as FedRamp, ISMAP, & EAL4+

Giga Deals via Azure Stack

Cloud Cost Optimization

2. Marketing:

Platform-focused vs. product suites

3. Channel:

Develop new partner ecosystem - marketplaces, cloud distributors, and MSSP

4. Field Sales Organizations:

Expand direct customers engagements & account planning in Japan and U.S. sellers.



Three Operating Principles of Radial Web

智 **Wisdom** from Data

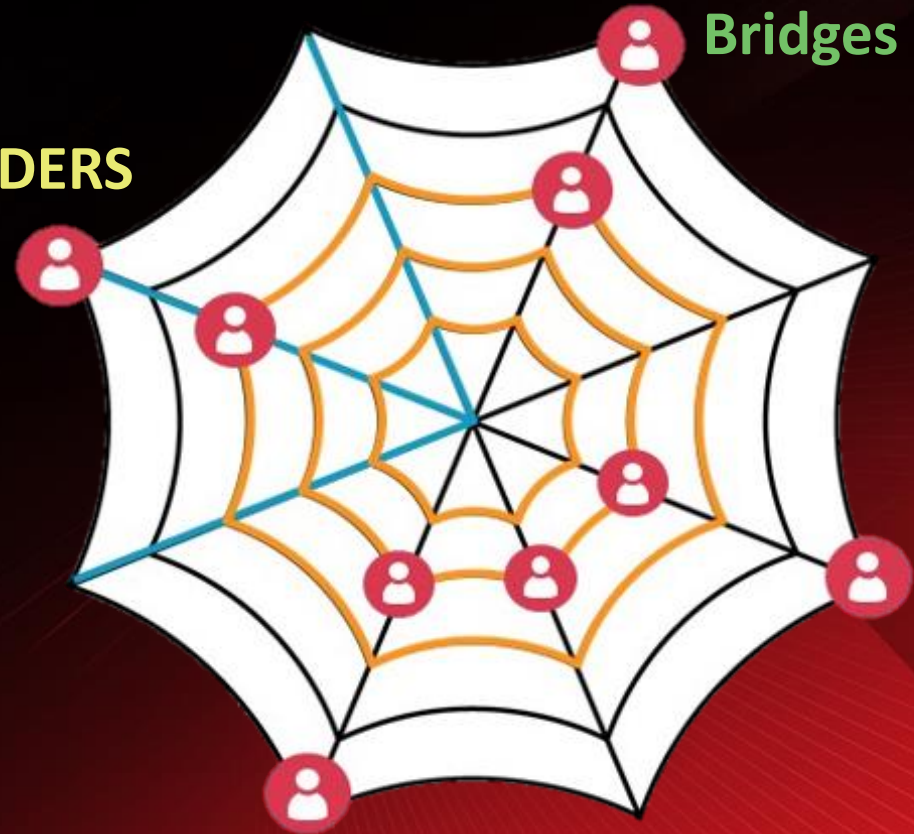
仁 **Empathy** for Customer

勇 **Bravery** with Accountability

BUILDERS

Bridges

Teachers



A PLATFORM COMPANY

Trenders Connected Together

